Surface Transport Panel

Date: **15 July 2015**

Item: **Bus Customer Satisfaction**

1 Purpose

1.1 The purpose of this paper is to set out how bus customer satisfaction is measured; recent trends in bus customer satisfaction; the factors driving these trends; and forecast bus customer satisfaction targets.

2 Recommendation

2.1 **The Panel is asked to note the paper.**

3 London's Bus Network

3.1 London has one of the world's largest urban bus networks, with over 8,000 buses operating across almost 700 routes and carrying more than 2.4 billion passengers every year.

3.2 Since Transport for London (TfL) was formed in 2000, it has invested strongly in London's bus network, resulting in a 69 per cent increase in passenger numbers. Customer satisfaction remains high and customer research is an integral part of our performance monitoring regime. TfL regularly surveys customers on a range of aspects related to their bus journey. Satisfaction scores are published quarterly to the TfL Board as part of TfL's Operational and Financial Reviews, are included in the TfL Annual Report and targets set in the TfL Business Plan. Satisfaction scores across 11 specific aspects (see figure 2 below) are also published on a quarterly basis on the TfL website.

3.3 A detailed understanding of what customers think helps TfL to identify the key issues and business priorities and informs decision making and the investment plan.

4 Measuring Bus Customer Satisfaction

4.1 Face-to-face interviews are carried out with passengers alighting at a pre-determined sample of bus stops throughout Greater London. Surveys are conducted from 0730 until 2100 to ensure service expectations of customers travelling at different times of day are represented.

4.2 Passengers are asked to rate over 20 different attributes related to their most recent bus journey on a scale of 0-10, where 10 is extremely satisfied and 0 is extremely dissatisfied. Mean scores are indexed to provide a score out of 100 (e.g. 7.4 becomes 74).

4.3 Approximately 1,000 interviews are carried out each financial period (13,000 interviews a year). The current sample size allows for network level data to be reported on a quarterly basis, and operator level data (for most operators) to be reported on an annual basis. The sample includes a wide range of bus routes, geographically spread to include both urban and suburban locations throughout the Greater London area.

4.4 There are over 18,000 bus stops within Greater London. The cost of covering all of these in the survey would be prohibitive. It is necessary, therefore, to select a sample of stops for the survey, considering:

(a) Variation in customers' travel patterns and their use of stops by time of day (e.g. on weekday mornings, the majority of customers travel to office centres, bus stations, train or Underground stations, and shopping centres);

(b) Location characteristics (e.g. major suburban centre, rail/underground station, residential area);

(c) Demographic profile of the area; and

(d) Number of bus routes serving the location by each operator.

4.5 The number of sampling points in the survey was increased from 82 to 100 in March 2009. The sample of passengers interviewed is representative of bus passengers aged 16 or over in terms of demographic profile, frequency of, and reasons for, bus usage. Respondents do not necessarily have to live within the defined survey area.

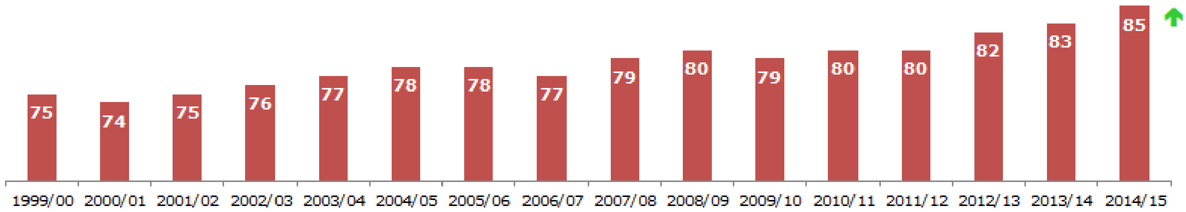
4.6 An extensive study (the Bus User Survey) was carried out during 1999, 2003, 2007 and 2014 to determine the demographic and journey profiles of bus users in London. Data from the 2014 Bus User Survey is used to correct for any imbalances in the random sampling process of the customer satisfaction survey, ensuring that the scores reflect the profile of bus customers.

4.7 The survey results are reported to the business on a periodic, quarterly and annual basis. The results include tables with the scores for the various aspects of the service, a full interpretive report covering topics that are relevant to the business, and the quality assurance reports which analyse the quality related elements of the survey.

5 Trends in Bus Customer Satisfaction

5.1 Overall satisfaction with bus services has increased significantly over the last ten years, with scores reaching an all-time high of 85 in 2014/15 (Figure 1), a two point improvement from 2013/14.

Figure 1: overall satisfaction over time



5.2 Trends in specific aspects of customer satisfaction since 2010/11 are set out in figure 2 below. All bus service and bus stop measures increased by one to two points from last year.

Figure 2: Trends in the specific aspects of customer satisfaction

Customer Satisfaction (score out of 100)	2010/11	2011/12	2012/13	2013/14	2014/15
Overall satisfaction	80	80	82	83	85
Specific Aspects:					
1. Personal safety & security	85	85	87	88	89
2. Crowding	78	79	81	81	82
3. Reliability	80	80	83	83	86
4. Information	79	79	81	80	81
5. State of repair of bus	82	82	84	85	86
6. Cleanliness	80	80	82	83	84
7. Bus stations	74	74	76	77	78
8. Bus stops & shelters	80	80	83	82	84
9. Smoothness of ride	78	80	81	81	83
10. Staff behaviour	85	85	86	86	88
11. Value for money	70	67	69	71	72

5.3 Further analysis into the distribution of overall customer satisfaction shows that more customers are scoring nine and ten for overall satisfaction, compared to three years ago, and fewer scoring seven to eight. The proportion scoring 0-6 has decreased slightly (See Appendix 1, figure 1.1).

6 Key Drivers of Bus Customer Satisfaction

6.1 Research conducted in 2014 shows four main drivers behind the recent trend of increasing satisfaction:

(a) reliability;

(b) information;

(c) ambience / design of buses; and

(d) bus driver performance.

6.2 Each of these factors has seen transformational improvements over the past decade in London.

6.3 Reliability, as measured by Excess Wait Time, has improved significantly and remained relatively stable in recent years (see Appendix 1, figure 2); firstly through the introduction of incentivisation in bus contracts; secondly through the availability of real time service control, enabled by TfL's automatic vehicle location system, iBus. Best ever reliability of one minute was reached in 2012, although this deteriorated slightly to 1.1 minutes in 2014/15.

6.4 Information available to customers has been transformed, mainly through live bus arrival information on the countdown screens at 2,500 bus stops across London, mobile applications and the TfL website. 54 per cent of journeys are now supported by live bus information, compared to 25 per cent in 2010. Bus location data is freely and openly available to apps developers which helps power numerous products on the market. This significantly extends the reach of the information we provide directly.

6.5 Bus ambience and design was improved throughout the 2000s, including by reducing the age of the bus fleet and setting standards of quality in operational contracts. More recently, the roll-out of the iconic New Routemaster bus has driven further improvements in satisfaction. Customers on New Routemasters score their journey on average three points higher than standard buses for overall satisfaction, four points higher for satisfaction with the vehicle and five points higher for cleanliness.

6.6 Bus driver performance plays a prominent role in customer satisfaction. In addition to the Driver CPC (Certificate of Professional Competence) training, bus drivers in London undertake a mandatory five days of training for the 'BTEC Intermediate Award in Professional London Bus Service Delivery'. TfL has input into the content delivered as part of this award, and, following a review of the qualification (first introduced in 2003), the training places a stronger emphasis on professionalism and customer service, with the unit on delivering an inclusive service at its core. The AA Driver Quality Monitoring programme combined with satisfaction surveys provides a mechanism for TfL to continually evaluate the effectiveness of bus driver training.

7 Forecasts in Bus Customer Satisfaction

7.1 The TfL Business Plan forecast bus customer satisfaction at 84 points in 2014/15, returning to 83 for the remainder of the plan.

Business Plan 2014	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21
Bus Customer Satisfaction	84	83	83	83	83	83	83

Figure 3: 2014 Business Plan forecast of Bus Customer Satisfaction

7.2 The outturn for overall bus customer satisfaction in 2014/15 was in fact 85, one point higher than forecast.

7.3 London's population and economy continues to grow – with a consequent increase in traffic. TfL is investing £4bn through the Roads Modernisation Plan to improve the Capital's roads, streets and town centres. This significant on going development and utility renewal works will impact the operation of the road network. The forecast decline in satisfaction in 2015/16 reflects the anticipated deterioration in bus reliability from congestion.

7.4 There has been no noticeable decline in satisfaction with bus services to date, suggesting either a lag effect delaying customer response, or ‘protection’ of satisfaction through improvements in other drivers, most notably information. Live bus arrival information is known to impact upon perceptions of time, and may be holding up satisfaction in the short term.

7.5 TfL is working to incentivise reliability improvements, notably in outer London, and to mitigate the impact of roadworks in central London through scheduling alterations and curtailments. Further work is ongoing to protect the bus network from the extensive roads modernisation programme and other highway and development works, primarily through the implementation of targeted bus priority measures. Bus reliability is therefore forecast to return to best ever levels by 2016/17.

7.6 During this period of deteriorating reliability, TfL is focusing its efforts on a range of measures to maintain customer satisfaction:

(a) £25m is allocated in the TfL Business Plan for additional driver training between 2016 and 2023. Although the nature of training has not yet been established, the following areas are being considered:

   (a) Reducing pain points (customer service, real time info, bus not stopping);
   (b) Accessibility (hidden and learning disabilities);
   (c) Further improving awareness of vulnerable road users; and
   (d) Provide direct bus driver incentives.

(b) Delivery of a bus ‘Customer Experience’ strategy, to define the ideal experience and identify initiatives to improve customer experience;

(c) Introducing a further 200 New Routemasters into service by 2016, increasing the size of the fleet to 800, helping to drive satisfaction in ambience and design.

7.7 Considering the recent deterioration in reliability, and the expected resultant impact on bus customer satisfaction, maintaining today’s record high customer satisfaction will be a considerable challenge. Further, research shows that customer expectations of services increase over time. Service enhancements are expected in order to maintain the same levels of satisfaction.

7.8 Targets for customer satisfaction will be reviewed as part of the 2015 Business Planning process, and will take into consideration the stronger than expected satisfaction in 2014/15, the deterioration in reliability and the measures TfL is planning to implement to mitigate this decline.

List of Appendices to This Report:

Appendix 1; Figure1.1: Distribution of Overall Evaluation Scores Over Time
Figure 1.2: Excess Wait Time since 2000/01

List of Background Papers:

None

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Appendix 1

Figure 1.1: Distribution of Overall Evaluation Scores Over Time

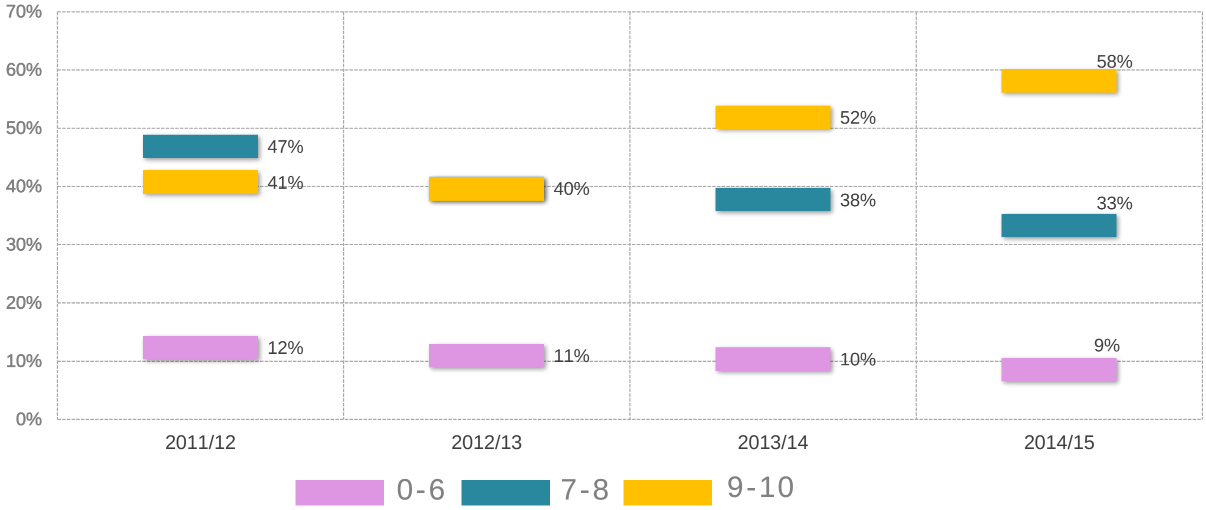

Figure 1.2: Excess Wait Time since 2000/01