

Bus User Profile

May 2014

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Synopsis

Respondent profile:

Main journey Purpose:

- Two main reasons for travel dominated bus use namely work (37%) and shopping (31%).
- 13% travelled for education and 19% leisure.
- The proportion of commuters and scholars increased compared to 2009, while the proportion of leisure users and shoppers decreased.

Age:

- Bus users continued to come from the younger and older age groups within the conurbation.
- There was an increase in the proportion of users from the 16-24 age group (from 22% to 26%).
- At the same time the proportion of over 60's declined (from 27% to 23%).
- 51% were aged 25-59, similar to 2009 figures.
- Commuters and scholars were most youthful, while shoppers were largely aged 60+ (49%).

Gender:

- Typically bus users were more likely to be female (65%) rather than male (35%).
- The female bias was noted amongst all groups peaking at 72% amongst shoppers.

Occupation/socio-economic group:

- Manual work continues to be the most dominant occupation with 24% in semi-skilled/unskilled manual work and 15% in skilled manual work.
- 18% were in clerical/administrative work.
- There was an increase in the proportion of students (from 11% to 14%).
- The proportion working full time went up from 41% to 44%. 18% worked part time, while 16% stated they were not in paid work.
- There was a dip in retired respondents (21%).
- Bus users continue to be disproportionately from the less affluent C2DE backgrounds (60%).
- The Mosaic profile of bus users also suggests a less affluent market with a disproportionate number coming from Ex Council Community (15%), Suburban Mindsets (12%) and Claimant Culture (11%).

Ethnicity:

- 83% of bus users were White a figure fractionally higher than that of the conurbation.
- 17% were from BME backgrounds.
- At 35% scholars were most likely to come from BME backgrounds, shoppers were least likely (91%, White).

Car ownership and availability:

- Bus users continue to be more likely than the conurbation to live in a household without a car (52%), just 48% lived in a car owning household.
- Bus users were increasingly likely to state that they did not have a car available to travel in for the journey they were making by bus (77%).
- At 79% commuters were least likely to have a car available to use.
- Scholars were most likely to have a car available – albeit at 74% a lack of car was still common.

Travel habits:

Frequency of Bus use:

- There was an increase in the proportion stating they travelled 5 days+ per week (60%, 2014; 51% 2009), a further 28% travelled 2-4 days a week.
- User's reliance on buses is indicated by only 7% travelling by bus less than once a month.
- Commuters travelled the most frequently (83% daily) followed by scholars (74%, daily). 43% of leisure users also travelled daily.
- Shoppers were more likely to travel 2-4 days per week (45%).

Usual Travel Times

- There was an increase in users who made outward bus journeys at both peak/off peak times (39% 2009; 50% 2014).
- The proportion who stated they travelled at off peak times only dipped to 27%, peak travel remained little changed (23%).
- Similarly there was an increase in return journeys made at both peak/off peak times (41%, 2009; 55% 2014), with a decline in off peak travel (40%, 2009; 25% 2014).
- 20% made return journeys during the peak.

Ticket Type Purchased:

- The proportion using a season ticket increased (40%), while there was a decline in the use of cash fares (37%) and concessionary passes (23%).
- In terms of cash fares there was a significant increase in the proportion using a NX Daysaver (22%) and a decline in single/return purchase (13%).
- When looking at season ticket use in more detail it can be seen that the NX Faresaver was the most commonly used season ticket overall (13%), followed by the NX Regional Travelcard (11%).
- 4% each purchased either a Student Faresaver or an nbus.
- 65% of commuters used a season ticket; however a third used a cash fare with the Daysaver being most popular (20%).
- 72% of students used a season ticket with the Student Faresaver being most popular (26%), an additional 16% used an nnetwork student while 17% used a Daysaver.

- In terms of season ticket purchase points there was an increase in the use of newsagents (39%) and Direct Debit (13%).
- The proportion using TIC's declined (28%) as did use of workplace schemes (3%).
- Use of school travel schemes remained high at 11%, accounting for 40% of student purchases.

Mode of travel to outward stop:

- 98% of bus users walked to their outward bus stop, just 2% travelled as a car passenger.

Shelter provision at outward stop:

- There was an increase in shelter provision at outward stops from 81% to 86%.
- Bus users in Birmingham were most likely to have a shelter provided (90%) while users in Coventry and Sandwell were least likely (81%).

Length of time taken to travel to outward bus

- The average journey time to outward stops was 7 min and 12 secs, similar to that recorded in 2009.
- Bus users in Sandwell (7 mins 27 secs) and Walsall (7 mins 39 secs) had the longest journey time to stop.
- Users in Coventry (5 mins 56 secs) had by far the shortest journey to stop.

Usual wait time at outward bus stop:

- The average wait times at outward stops was 8 min 41 sec, a similar response to that recorded in 2009 (8 min 44 sec).
- Scholars (8 min 27 secs) and commuters (8 mins 43 secs) had the shortest wait times, while leisure uses (9 min 4 secs) had the longest.

Mode of travel to return bus stop:

- 99% of users walked to the stop where they made their return journey.

Presence of bus shelters at return stops:

- Shelter provision remained more likely at return stops than at outward stops (92%) improving on 2009 figures (88%).
- Provision was high in all districts – above 90% - with the exception of Coventry where shelter provision dipped to (87%).

Length of Time Travelling On The Bus:

- Average bus journey times increased significantly - from 23 mins 17secs to 27 mins 19 secs.
- Commuters (30 mins 57 secs) and scholars (29 mins 47 secs) had the longest travel times, seeing the biggest increases from 2009.
- Shoppers had the shortest journey time (21 mins 56 secs).
- Journey times increase in all districts with bus users in Coventry (29 mins : 46 secs) and Solihull (29 mins 42 secs) recorded the longest average journey time.

- At 22 mins 46 secs users in Sandwell had the shortest journey time.

Number of buses used to get to destination:

- The majority of users could reach their destination catching only one bus (66%).
- However there has been a significant increase in the proportion needing to catch multiple buses to reach their destination (34% 2014; 22% 2009).
- Commuters (44%) and scholars (41%) were most likely to have to catch multiple buses.
- Users in Coventry were most likely to catch multiple buses (37%), closely followed by respondents in Birmingham and Wolverhampton (36%).

Bus Company Competition Along Bus Route

- On their usual bus journey just over half of users (51%) said they had a choice of bus operator on their route.
- Respondents in Solihull were most likely to have a choice of operator (60%) as did 54% of bus users in Birmingham.
- Choice of operator dipped to 41% in Wolverhampton and to 46% in Coventry.

Proportion of NX Bus Journeys

- Respondents were making more of their bus journeys by NX buses with 51% making all of their last 10 bus journeys by NX buses (46%, 2009).
- A further 29% had made between 80-90% of their last 10 journeys by NX buses.
- Only 2% of respondents had used services other than NX for all of their last 10 bus journeys.

Level of Rail/Metro use on Usual Bus Journey:

- 90% of respondents did not travel by rail or Metro as part of their usual bus journey, a slight decrease on the 96% reported in 2009.
- 8% used local rail while 4% travelled by Metro.

Main reason for travelling by bus:

- The main reasons for bus use involved a lack of car/car availability, with 71% stating *no car/don't drive* and 5% *no car available/being used*.
- 7% felt they had no *choice/only method available*.

Changes in Bus travel over last 12 months:

- 75% noted no difference in bus use compared to 12 months ago, however 19% noted they were using buses more often and just 5% less often.

Opinion of the Bus service over last 12 months:

- 19% thought that bus service had got better a dip on the 27% recorded in 2009.
- 15% thought services had got worse (10% 2009).
- 65% thought they had stayed the same.

Sources Of Bus Information:

- To find bus information 33% would check the timetable at stop, 29% would check the internet, while 18% would use a TIC/Travel shop. 9% would use Apps and 5% would phone for information.
- The proportion who would check timetables and use the internet had increased since 2009, the proportion using travel shops and phone lines had declined.
- Use of the internet was most common amongst commuters (38%) and scholars (37%) as was use of Apps (scholars, 18%; commuters, 12%).
- Timetable use was most common amongst shoppers (37%) and leisure users (36%).
- The most commonly used website was www.networkwestmidlands (14%).
- At 6% the most commonly used App was NX West Midlands, use of this App rose to 13% amongst the more youthful scholar market.

Use Of Social Media:

- 55% of bus users had a Smartphone, a figure lower than the national average. 38% owned a mobile phone (but not a Smartphone) while 6% did not own a mobile phone.
- Smartphone ownership peaked at 90% amongst scholars and at 67% amongst commuters.
- At 48% Facebook was the widest used social network site, followed by Twitter at 17%. Half of bus users (50%) used neither Facebook nor Twitter.
- Scholars were the biggest users of social media with 77% using Facebook and 43% Twitter.
- 56% of commuters also used Facebook and 19% Twitter.
- Shoppers were least likely to use Social Media (71%).

1.0 INTRODUCTION

1.1 BACKGROUND TO RESEARCH

1.1.1 The West Midlands bus network carried 376.3 million passengers in 2012/13 and accounts for 84% of all public transport journeys. There are over 50 bus operators in the West Midlands county who are part of the 'Network West Midlands' umbrella. By far the largest operator running 77% of all bus service kms is National Express West Midlands. Centro works in partnership with Bus Operators largely through its Transforming Bus Travel Strategy (TBT), which sets out to improve the quality of bus travel in the West Midlands by putting the needs of passengers first. Positively over the last year there appears to have been an increase in bus patronage, bucking the trend of the last few years.

1.1.2 As far back as 1998 Centro has conducted a comprehensive Bus User Profile survey with the last survey commissioned in 2009. New research was commissioned in 2014 to monitor any changes in bus use over the last five years and to provide a comprehensive picture of the current bus market.

1.2 RESEARCH OBJECTIVES

1.2.1 The survey was designed to capture a representative profile of travel habits and socio-economic characteristics of bus users throughout the West Midlands:

- i) The profile of bus users in terms of journey purpose, age, gender, occupation, working status, socio economic group, ethnicity, car ownership, car availability and Mosaic profile.
- ii) Travel characteristics in terms of frequency, usual travel times, ticket type purchased and longevity of use.
- iii) Details of bus journeys in terms of mode of travel to stop, travel times to stop, journey length and presence of bus shelters at stops.
- iv) Number of buses used to get to destination.
- v) Choice of bus operators on route and proportion of trips made on NX buses
- vi) Level of Metro and rail use on usual journey.
- vii) Main reasons for bus use.

- viii) Changes in bus travel over the last 12 months and whether improvements noted.
- ix) Sources of bus information.
- x) Frequency of travel by other modes.
- xi) Use of Social Media and Smartphone access.

2.0 THE SURVEY

2.1 SURVEY METHODOLOGY

2.1.1 The survey was conducted via face to face interview amongst bus users. Interviews were conducted on street at 49 key points across the West Midlands conurbation. Surveys were conducted on weekdays between 0730-1830hh and on Saturdays between 1000-1600hh. For a copy of the questionnaire see **Appendix 1a**. In order to ensure the data was comparable to previous years quotas were set on the basis of time of day and district. See **Table 1**.

2.2 SURVEY TIMES AND DATES

2.2.1 The survey was conducted between March- May 2014, the fieldwork and data entry for this study were conducted by AECOM through Centro's Market Research Framework Agreements.

Table 1 : Number Of Required Interviews By Time Of Day/Day Of Week/District

District	No. Interviews			Total
	Weekday peak Before 0930 & 1531-1800	Weekday off peak 0931-1530 & After 1800	Saturday	
Birmingham	600	600	180	1380
Coventry	150	150	70	370
Dudley	150	150	70	370
Sandwell	150	150	70	370
Solihull	150	150	70	370
Walsall	150	150	70	370
Wolverhampton	150	150	70	370
Total	1500	1500	600	3600

3.0 RESULTS I : RESPONDENT PROFILE

3.1 SURVEY SAMPLE SIZE BY LOCATION

3.1.1 3744 interviews were conducted over the survey period, more than the 3600 required. A sample of this size has a low margin of error of 1.3% at a 95% confidence level; one can therefore be confident that the true answer lies within 1.3% of the survey findings.

3.1.2 **Table 2** illustrates that quotas were broadly met in terms of district and time/day of travel. For more details on survey location see **Appendix 2**.

Table 2 : Interview Achieved By Time And District

	Total	Weekday Peak	Weekday Off Peak	Saturday
Birmingham	1421	606	635	180
%	38	39	40	29
Coventry	384	156	153	75
%	10	10	10	12
Dudley	378	153	150	75
%	10	10	10	12
Sandwell	397	157	165	75
%	11	10	10	12
Solihull	389	156	161	72
%	10	10	10	12
Walsall	387	153	160	74
%	10	10	10	12
Wolverhampton	388	159	154	75
%	10	10	10	12
Base	3744	1540	1578	626
%		41	42	17

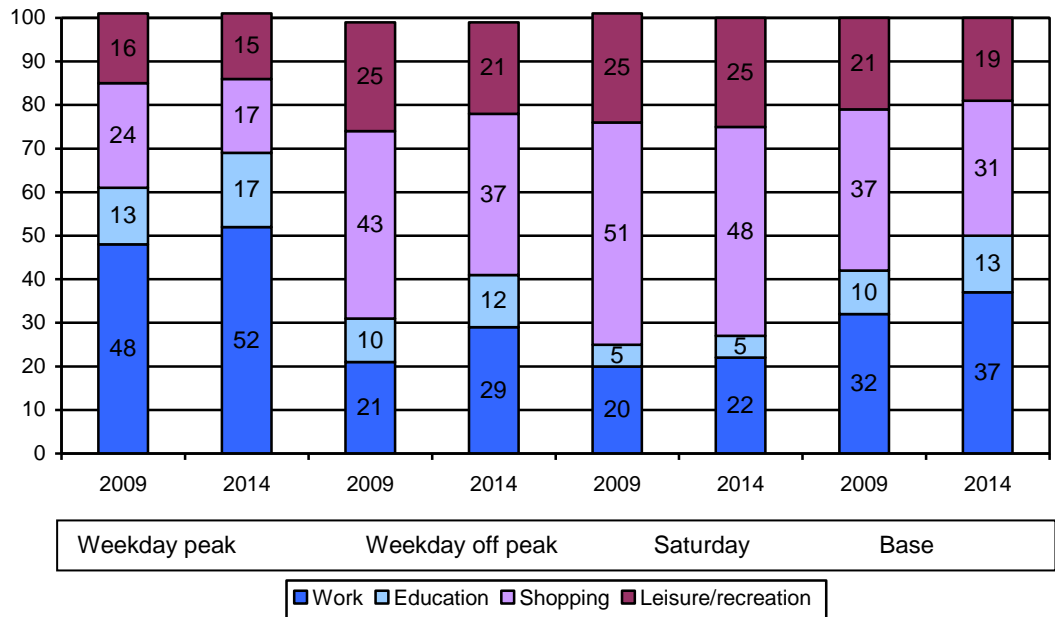
3.2 JOURNEY PURPOSE

3.2.1 Respondents were asked to give the main purpose for bus use. As with previous years two main reasons dominated namely work (37%) and shopping (31%). An additional 13% travelled for education and 19% for leisure. The proportion of workers has increased significantly from 2009 (32%) as had the proportion of scholars (10%). At the same time there was a decline in the proportion of shoppers and leisure users. **See Figure 1 and Appendices 3a and 3b.**

- Commuters (52%) and Scholars (17%) made up an increasing proportion of the peak time market.

- The decline in shoppers was noted during peak and off peak times, despite this they continued to make use significant proportions of the off peak (37%) and Saturday market (48%).
- Similarly the decline of leisure travel was also noted at peak and off peak times, however leisure use continues to account for a quarter of travel on Saturday and a fifth of off peak travel.

Figure 1 : Main Journey Purpose By Time And Day Of Travel 2009/2014 Compared

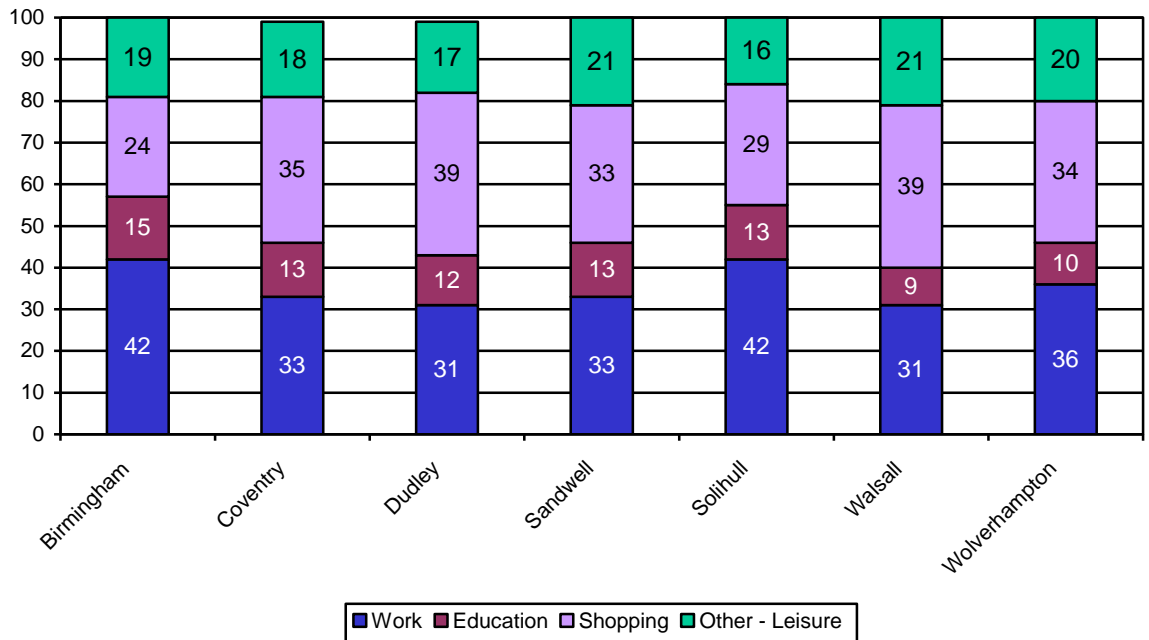


3.2.2

Figure 2 looks at journey purpose by district.

- Bus users in Solihull, Birmingham (42% each) and Wolverhampton (36%) were most likely to be commuting by bus.
- In contrast respondents in Dudley (39%), Coventry (35%) and Walsall (39%) were more likely to be travelling for shopping.
- Bus users in Sandwell were evenly split between commuters and shoppers (33% each).
- At 15% Birmingham had the highest proportion of scholars, while Sandwell and Walsall had the highest proportion of leisure users (21% each).

Figure 2 : Journey Purpose By District



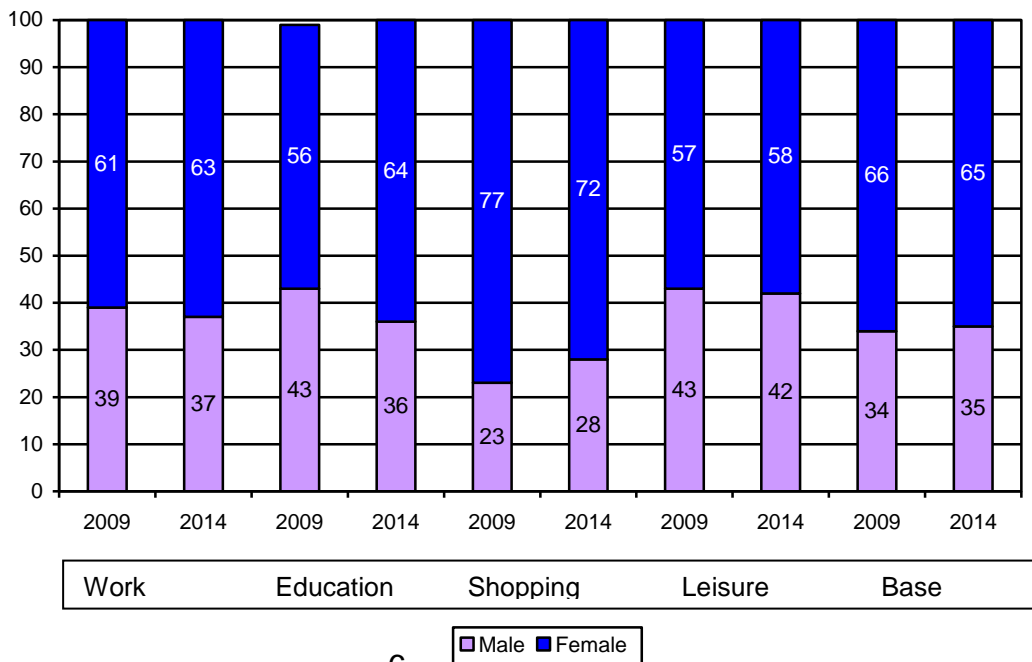
3.3

RESPONDENTS GENDER

3.3.1

Typically bus users tend to be female rather than male; this continues to be the case in 2014. 65% of respondents were female a figure significantly higher than that of the West Midlands conurbation (51%). Just 35% of respondents were male. **Figure 3 and Appendices 4a and 4b.**

Figure 3 : Respondents' Gender By Journey Purpose 2014/2009 Compared

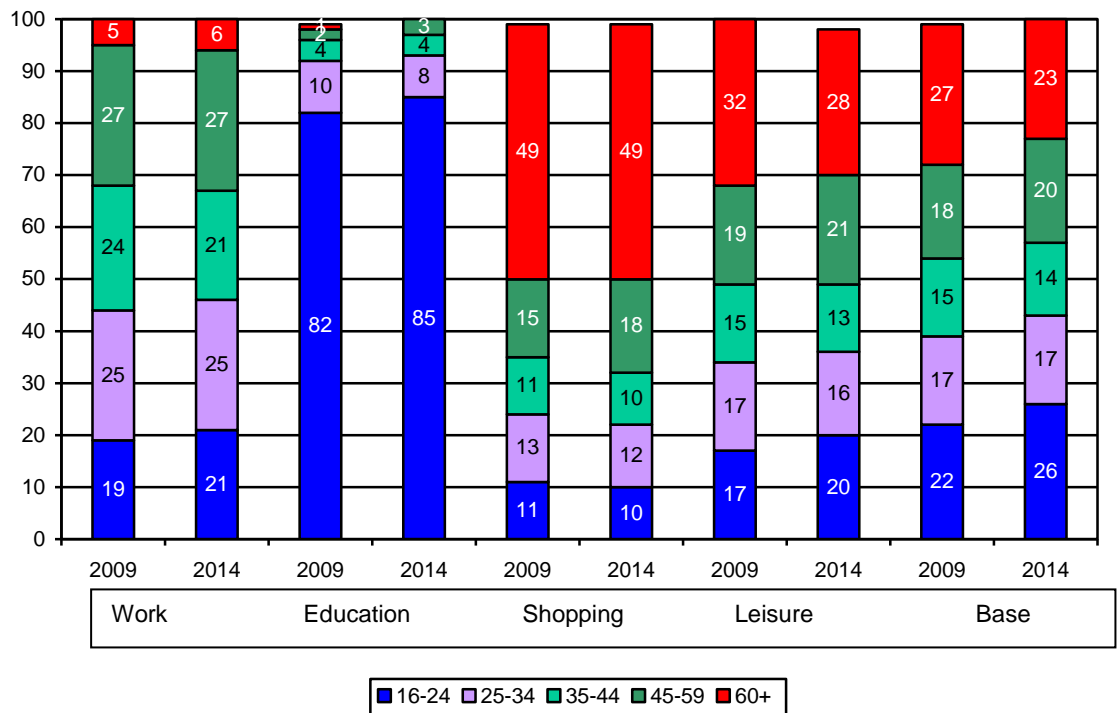


- 3.3.2 When looking at gender by journey purpose it can be seen that:
- The female bias was apparent amongst all groups peaking at 72% amongst shoppers.
 - Females accounted for 63% of commuters and 64% of scholars.
 - Leisure users had the most even gender split (58% female, 42% male).

3.4 RESPONDENT AGE

3.4.1 The 2009 survey suggested bus users come from younger and older age groups within the conurbation, this continues to be the case. However there was an increasing proportion of users from the 16-24 age group (26%), perhaps reflecting the increase in commuters and scholars. At the same time the proportion of over 60's declined to 23% from 27%. 51% were aged between 25-59, a similar proportion to the 50% recorded in 2009. **See Figure 4 and Appendices 5a and 5b.**

Figure 4 : Respondent Age 2009/2014 Compared



- 3.4.2 In terms of journey purpose it can be seen that:
- Commuters were most likely to be aged between 25-59 (73%), albeit there was a slight increase in those aged 16-24 (21%).
 - Scholars were increasingly aged 24 and under (85%).
 - Shoppers (49%) continued to largely be aged 60+.

- There was an increase in leisure users aged 16-24 (20%), albeit the majority continued to be aged 25-59 (50%) or 60+ (27%).

3.5 OCCUPATION, WORKING STATUS AND SOCIO-ECONOMIC GROUP

3.5.1 **Occupation:** Respondents were asked to give their occupation/previous occupation if retired.

- Manual work continues to be the most dominant occupation with 24% semi-skilled/unskilled manual and 15% skilled manual workers.
- 18% were in clerical/administrative work, marking a decline on 2009 figures (21%).
- Unsurprisingly giving the youthful profile of respondents 14% were students, an increase from 2009 (11%).
- Just 10% were in the most affluent professional/managerial occupations, however this marks an increase on 2009 figures (7%).
- 11% were unemployed while 7% were housewives – a decline from 14%. **See Figure 5 Appendices 6a and 6b.**

Figure 5: Bus User Occupation 2009/2014 Compared

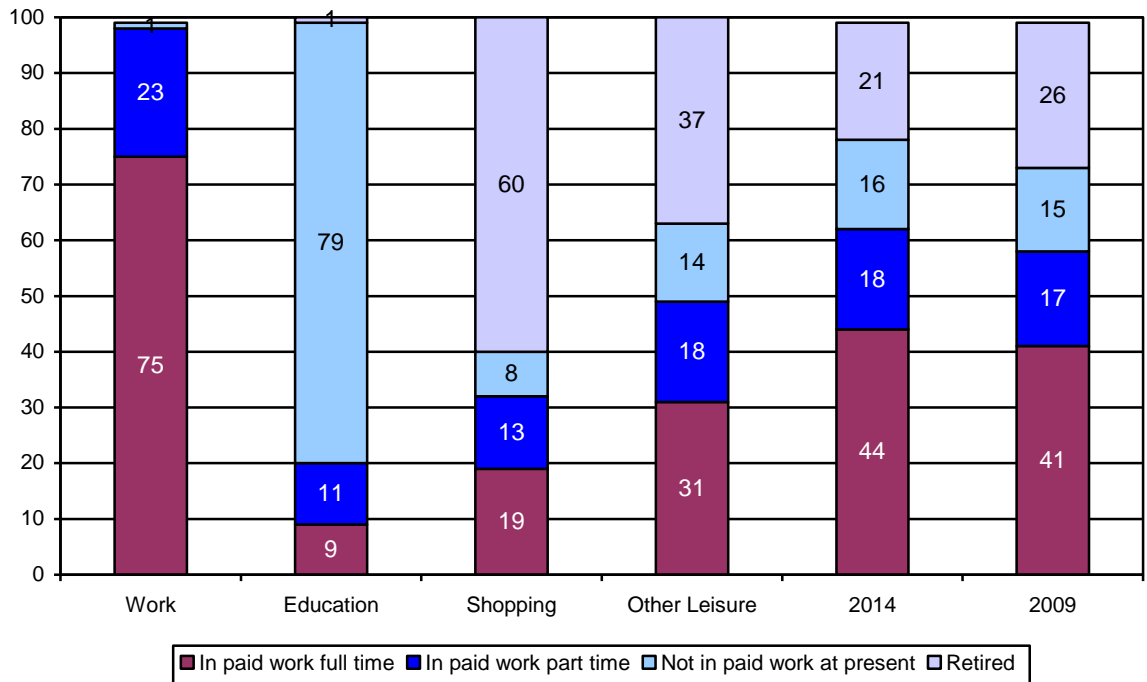


3.5.2 **Working status:** Respondents who had not previously stated they were unemployed or housemakers were asked to give their current working status. Overall there had been an increase in those working full time (44%). 18% worked part time with a further 16% stating they were not in paid work at present. 21%

were retired a decrease from 2009 figures. **See Figure 6 and Appendices 6c to 6e.**

Figure 6 : Respondents' Working Status 2009/2014
Compared

Excludes unemployed/housewives

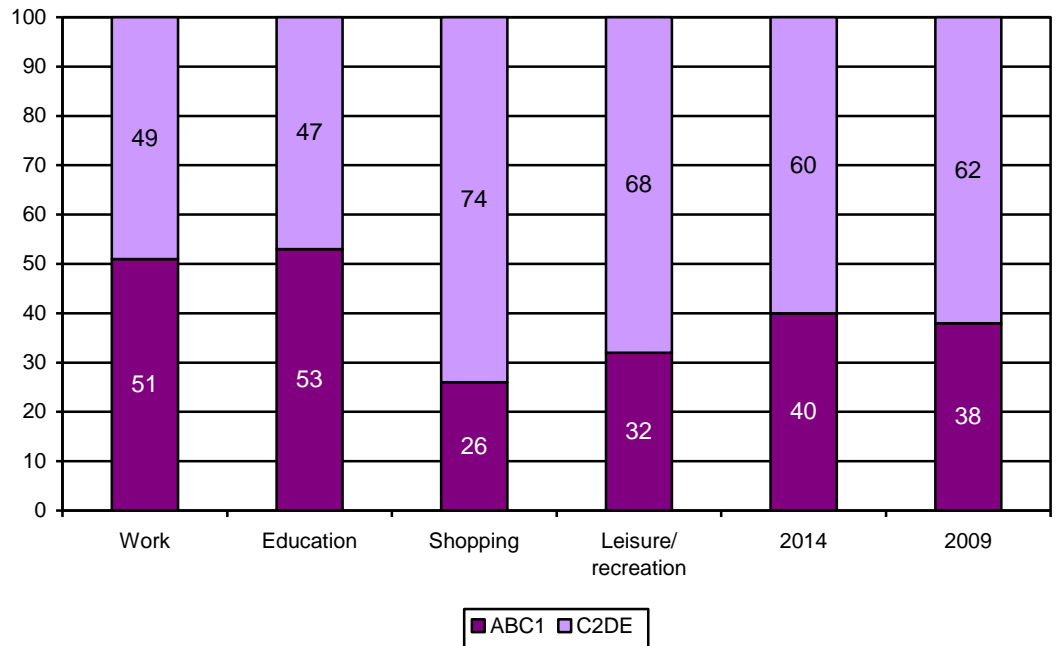


- Logically at 75% commuters were most likely to be in full time work with a further 23% in part time work.
- Scholars were largely not in paid work at present; albeit 11% worked part time and 9% full time.
- 60% of shoppers were retired.
- Significant proportions of leisure users were also retired (37%), however a further 31% were in full time work.

3.5.3

Socio-economic group: In light of respondents given occupation, it is perhaps unsurprising to find that bus users continue to be more likely than the conurbation as a whole to emanate from the least affluent, C2DE social groups made up of semi skilled/unskilled manual workers and those claiming benefits (60% C2DE, 54% in the conurbation). ABC1 membership, largely made up of professional/white collar professions, stood at 40% (46% conurbation). Socio Economic Groups was similar to 2009. **See Figure 7 and Appendices 6f and 6g**

Figure 7 : Socio-Economic Group 2009/2014 Compared



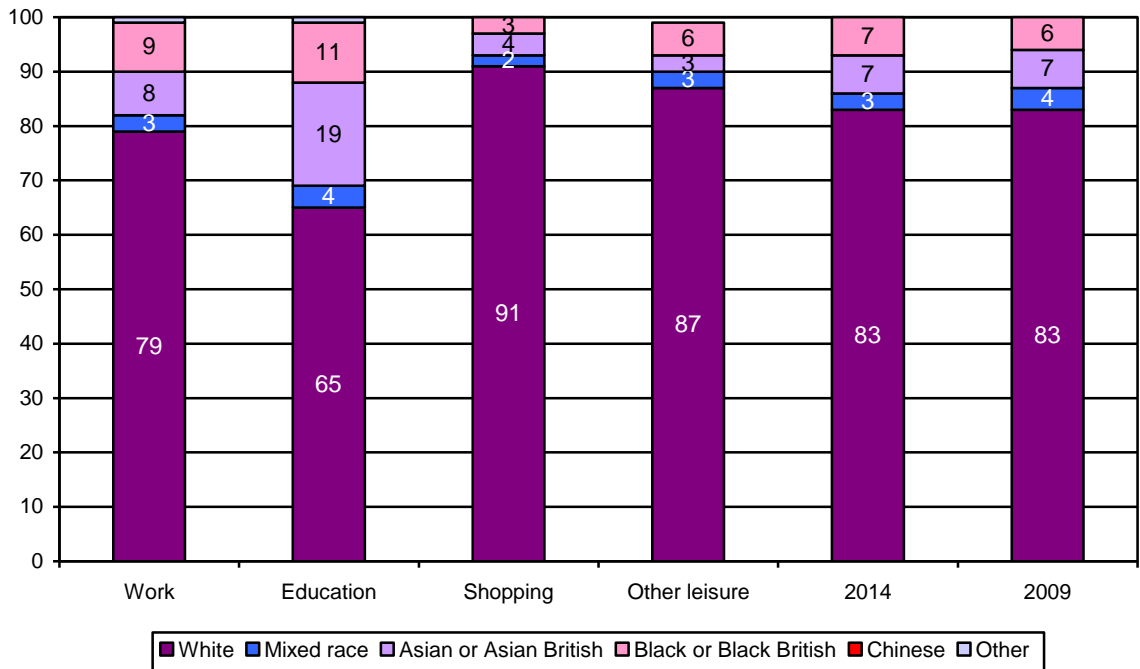
- Commuters (51%) and scholars (53%) were most likely to come from ABC1 households.
- Shoppers (74%) and leisure users (68%) were more likely to be classified as C2DE.

3.6 ETHNICITY

3.6.1 There was little change in the ethnicity of bus users with the majority (83%) being White a figure higher than that of the conurbation (70%). Just 17% came from BME backgrounds, 7% each were either Asian or Black and 3% were mixed race. **See Figure 8 and Appendices 7a to 7b.**

- Scholars at 35% were most likely to come from BME backgrounds, with just 65% being White and 19% being Black and 11% Asian.
- Commuters also had a slightly higher proportion of ethnic minority users (21%), albeit over three quarters were White.
- At 91% shoppers were most likely to be White.
- Leisure users (87%) were also largely White with just 13% from BME backgrounds.

Figure 8: Ethnic Group By Main Journey Purpose 2009/14 Compared



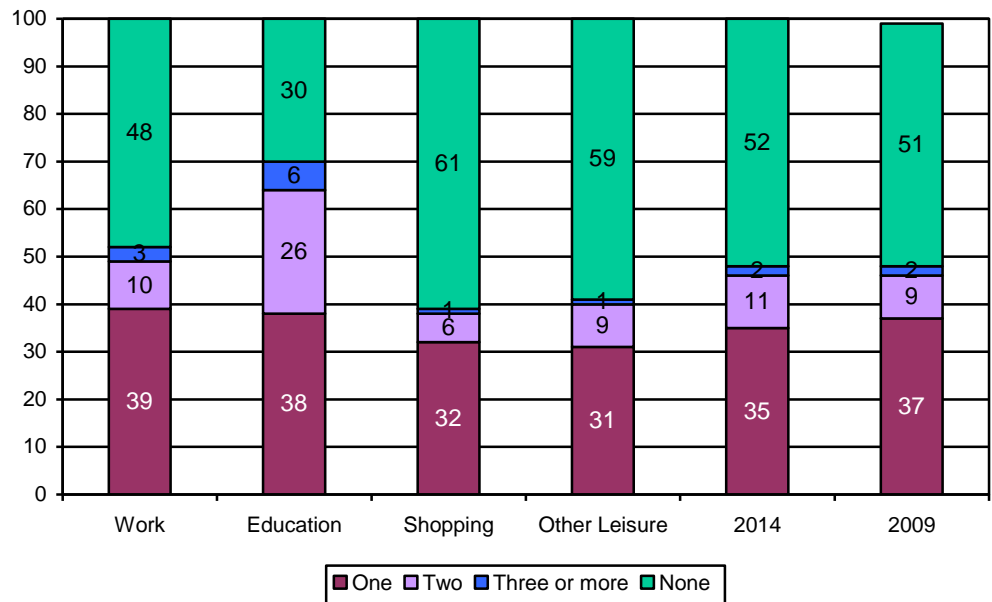
3.7

CAR OWNERSHIP AND CAR AVAILABILITY

3.7.1

Bus users continue to be more likely than the conurbation as a whole to live in a household without a car (52%, bus user; 31% conurbation), this figure is largely unchanged from 2009 (51%). Just 48% lived in a car owning household. **See Figure 9 and Appendices 8a to 8b.**

Figure 9 : Car Ownership 2009/2014 Compared



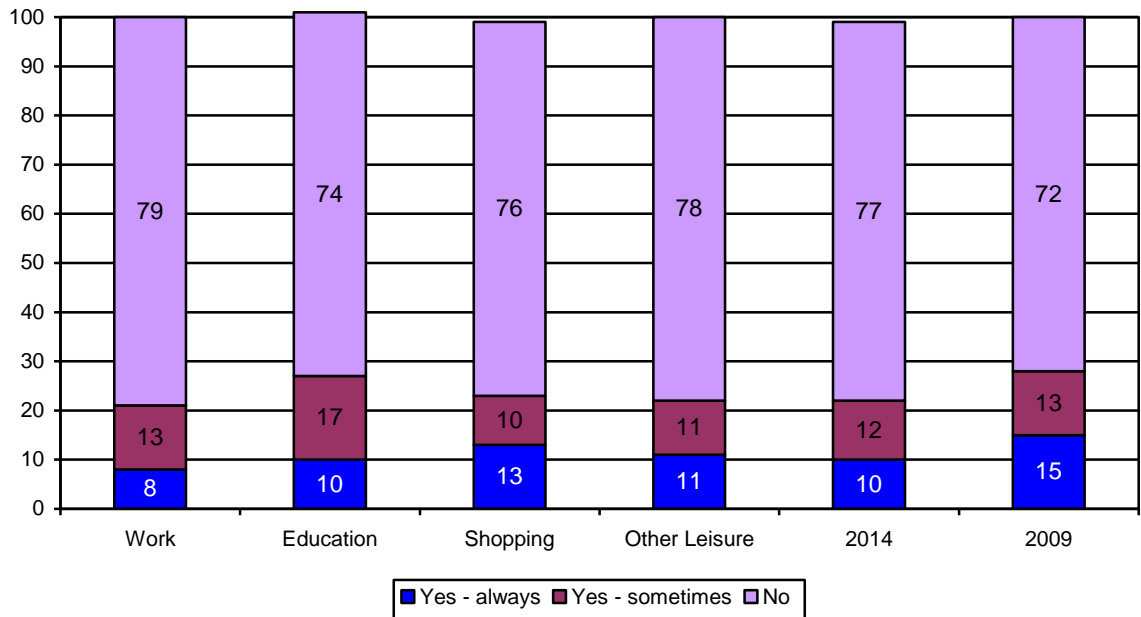
- Scholars at 70% were most likely to live in a household with a car – with car ownership amongst this group being similar to that of the conurbation.
- Around half of commuters (48%) lived in a non car owning household.
- At 61% shoppers were least likely to own a car, while 59% of leisure users also lived in households without a car.

3.7.2

Car Availability for travel: Bus users not only had low levels of car ownership, but few had a car available to use for the journey they made by bus. Indeed compared to 2009 there was an increase in respondents who stated a car was unavailable (77% an increase on the 72% reported in 2009). Only 10% stating that they *always had a car available* (15%, 2009) **See Figure 10 Appendices 8c to 8d.**

- Not having a car available was the norm amongst all groups of users.
- At 79% commuters were least likely to have a car available to use.
- Scholars were most likely to have a car available – albeit at 74% a lack of car was still common.

Figure 10 : Car Availability By Main Journey Purpose



3.8 **MOSAIC PROFILE OF BUS USERS**

3.8.1 The latest version of Mosaic UK classifies consumers in the United Kingdom into one of 67 types and 15 groups on the basis of their home postcode. It provides an understanding of the demographics, life styles and behaviours of all individuals and households in the UK. **Table 3** looks at the Mosaic grouping of Bus users.

3.8.2 The key Mosaic grouping amongst bus users are:

- *Ex council community* accounts for 15% of bus users. This was the dominate group across all users and is made up of households with low levels of education but sufficient incomes to live in better right to buy council houses.
- 12% were from *Suburban Mindsets* – a group made up of maturing families on mid range incomes living a moderate lifestyle in suburban semis.
- 11% each were from *Claimant Culture* (families reliant on benefits living in low-rise council housing where there is widespread disadvantage) or *Terraced Melting Pot* (Lower income workers, mostly young living in tightly packed inner urban terraces, including some areas of high diversity).
- 8% emanated from *Industrial Heritage*, families and couples owning affordable older style housing in communities historically dependent on manufacturing.

- 3.8.3 There were also some significant pockets of users in different user groups:
- Significant proportions of commuters (5%) and scholars (7%) came from *Liberal Opinions* – young, well educated city dwellers enjoying the vibrancy of urban life.
 - 7% of shoppers came from *Elderly Needs* – elderly people who are reliant on support either through specialised accommodation or the basic state pension.
 - 7% of leisure users came from *Upper Floor living* (young mostly single people reliant on limited incomes renting flats from local councils).

3.8.4 **Appendices 9a to 9d** map the Mosaic group of respondents by each key user group.

Table : 3 Mosaic Grouping of Bus Users By Main Journey Purpose

Mosaic group			Work	leisure	Shopping	Education	All Bus users	WM conurbation
A	Alpha Territory	People with substantial wealth who live in the most sought after neighbourhoods	1	2	1	2	2	3
B	Professional rewards	Experienced professionals in successful careers enjoying financial comfort in suburban or semi-rural homes	2	2	3	2	2	5
C	Rural Solitude	Residents of small villages and isolated homes where farming and tourism are economic mainstays	0	0	0	0	0	0
D	Small Town Diversity	Residents of small and medium-sized towns who have strong roots in their local community	3	3	3	2	3	4
E	Active retirement	Elders who have sufficient pensions and savings to choose pleasant locations in which to enjoy their retirement	2	2	3	1	2	3
F	suburban mindsets	Maturing families on mid-range incomes living a moderate lifestyle in suburban semis	11	13	12	14	12	14
G	Career and kids	Families with young children where both parents are likely to earn solid incomes providing for a comfortable modern home	1	2	1	2	1	3
H	New homemakers	Young singles and couples in small modern starter homes	5	5	3	3	4	5
I	Ex council community	Residents with low levels of education but sufficient incomes who live in the better right-to-buy council houses	15	14	16	14	15	12
J	Claimant culture	Families reliant on benefits living in low-rise council housing where there is widespread disadvantage	11	11	12	14	11	10
K	Upper floor living	Young, mostly single people on limited incomes renting small flats from local councils	5	7	5	3	5	6
L	Elderly needs	Elderly people who are reliant on support either through specialised accommodation or the basic state pension	4	6	7	4	5	6
M	Industrial Heritage	Families and couples owning affordable older style housing in communities historically dependent on manufacturing	8	6	9	9	8	11
N	Terraced melting pot	Lower income workers, mostly young, living in tightly packed inner urban terraces, including some areas of high diversity	13	11	9	11	11	13
O	Liberal Opinions -	Young, well-educated city dwellers enjoying the vibrancy and diversity of urban life	5	4	3	7	4	6

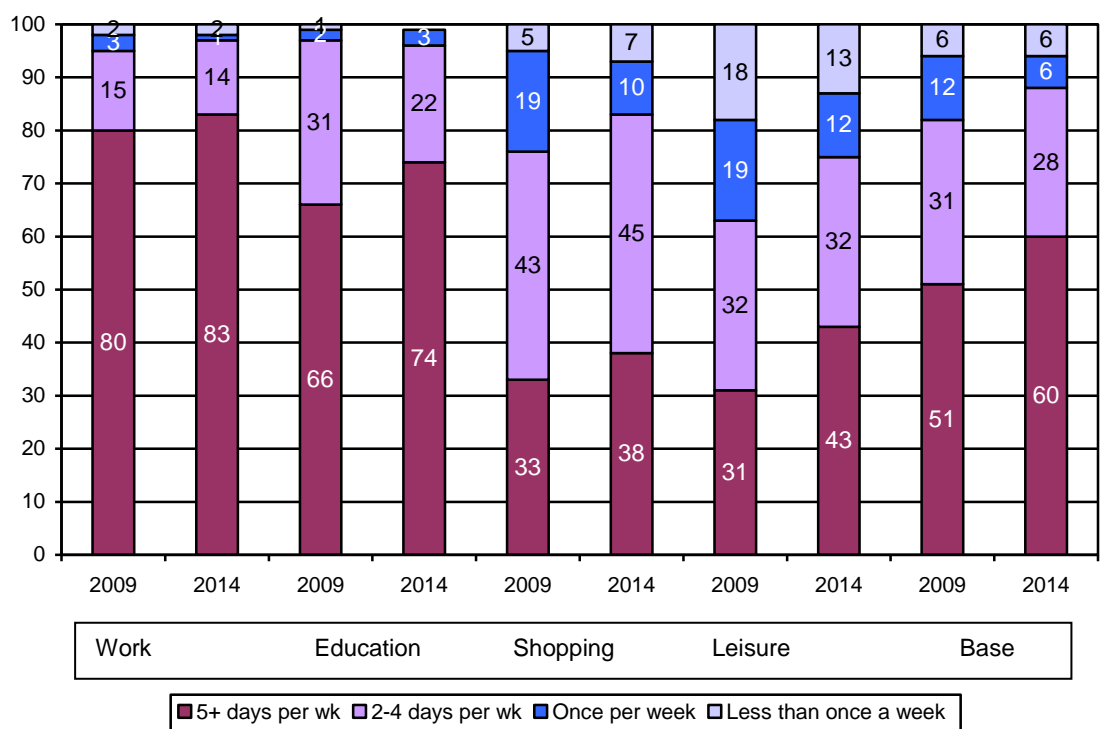
Highlights indicate significant user groups

4.0 RESULTS II : TRAVEL PATTERNS

4.1 FREQUENCY OF BUS USE

4.1.1 **Frequency of local bus use:** Respondents were asked how frequently they travelled by local bus. Daily travel rose to 60% (51% 2009), probably as a result of the increase in commuters and scholars. Fewer users were travelling 2-4 days per week (31%, 2009; 28%, 2014) and once a week (12%, 2009; 6%, 2014). User's reliance on bus travel is illustrated by the fact that just 7% travelled by bus less than once a month. See Figure 11 and Appendices 10a to 10c.

Figure 11 : Frequency Of Use By Main Journey Purpose



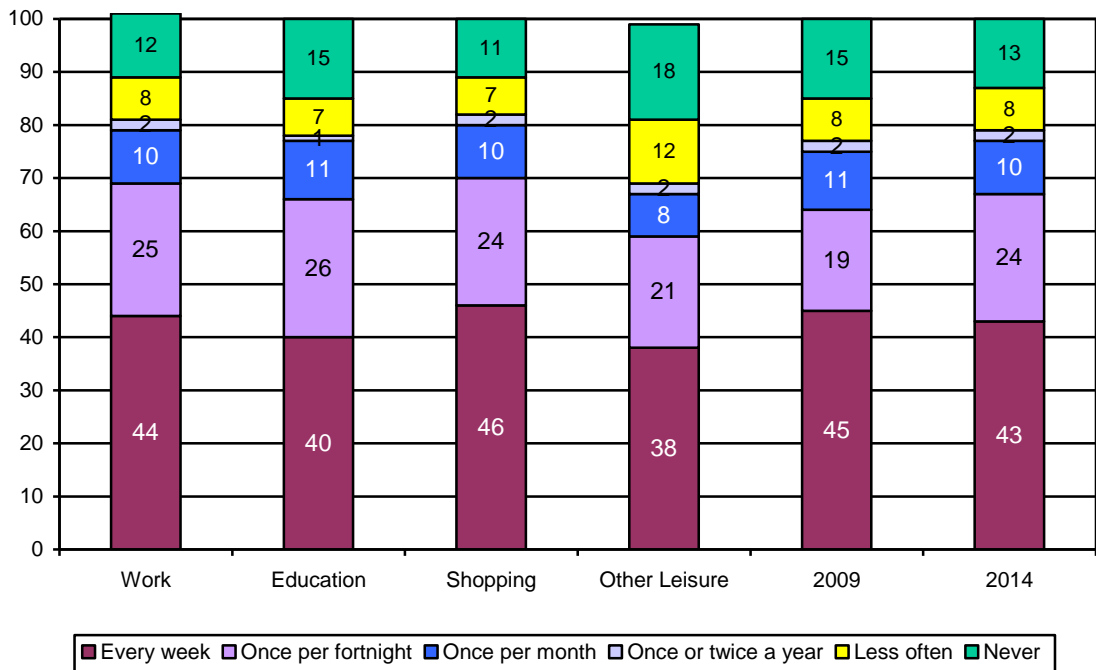
- Increases in daily travel were noted across all journey types.
- Commuters travelled the most frequently at 83% daily, followed by scholars (74%).
- Shoppers (38%) and leisure users (31%) were less likely to travel daily, with shoppers more likely to travel 2-4 days per week (45%). Leisure users were the group most likely to travel less than once a week (18%).

4.1.2 **Frequency of bus use on a Saturday:** Respondents were frequent Saturday bus users with 77% using bus services at least one Saturday a month, an increase on the 75% recorded in 2009. Indeed 43% travelled by bus every Saturday. Only 13%

of respondents stated that they never travelled by bus on a Saturday. See Figure 12 and Appendices 10d and 10f.

- Shoppers (46%) and commuters (44%) were most likely to travel every Saturday, as did 40% of scholars.
- Leisure users were least likely to travel every Saturday (38%) albeit 67% travelled at least one Saturday a month.

Figure 12 : Frequency Of Saturday Travel 2009/2014 Compared

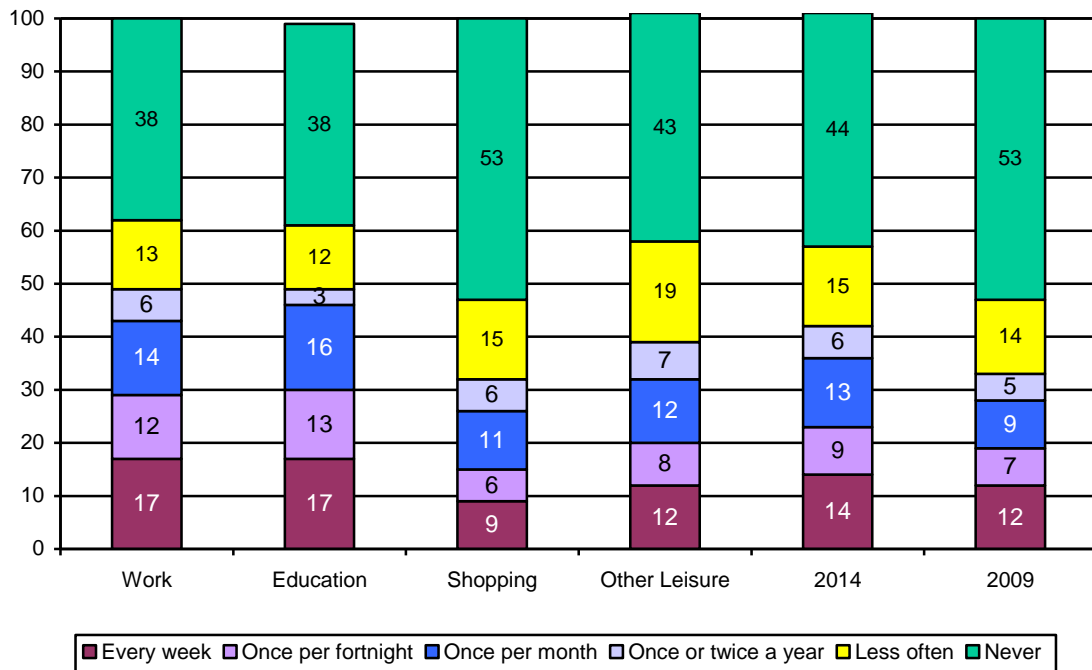


4.1.3

Frequency of bus use on a Sunday: Bus use on a Sunday was less common, however 36% travelled by bus at least one Sunday a month – a significant increase on the 28% reported in 2009. 44% never travelled on a Sunday. See Figure 13 and Appendices 10g and 10i.

- Scholars (46%) and Commuters (44%) were most likely to travel at least one Sunday per month.
- Leisure users (31%) and shoppers (26%) were least likely to travel at least one Sunday per month.
- Sunday bus use varied significantly by District being most common in Birmingham (47%) and Solihull (43%).
- Sunday bus use was much less common in Walsall (18%), Wolverhampton (22%) and Dudley (29%). Whether this is due to a lack of Sunday services in this area or a lack of demand is outside the remit of this report.

Figure 13 – Frequency of Bus Use on Sunday 2009/14 Compared



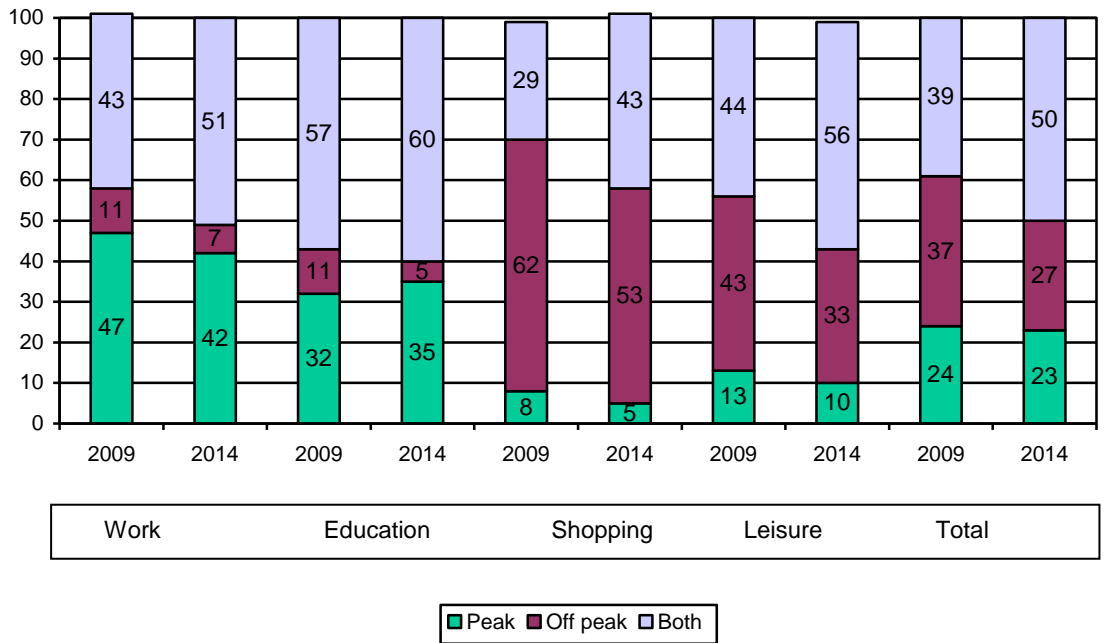
4.1.4 **Frequency of bus use outside the West Midlands:** Travel by bus outside the West Midlands was low with 80% of respondents never using such services. 8% used services outside the West Midlands on a monthly basis, a figure similar to the 9% recorded in 2009, and 10% did so less than once a month.

4.1.5 Perhaps unsurprisingly respondents aged 65+, who can use their free travel concession pass to travel outside the region were most likely to travel outside of the West Midlands with 11% doing so monthly. **See Appendices 10k to 10m.**

4.2 USUAL TRAVEL TIMES

4.2.1 **Outward Journeys:** Overall there was an increase in those who stated that they made outward bus journeys at both peak/off peak times (39% 2009; 50% 2014). At the same time the proportion who stated they travelled at off peak times only dipped to 27%. The proportion who made outward journeys at peak times only remained little changed (23%). **See Figure 14 and Appendices 11a and 11b.**

Figure 14 : Usual Travel Time From Outward Stop By Main Journey Purpose 2009/14 Compared

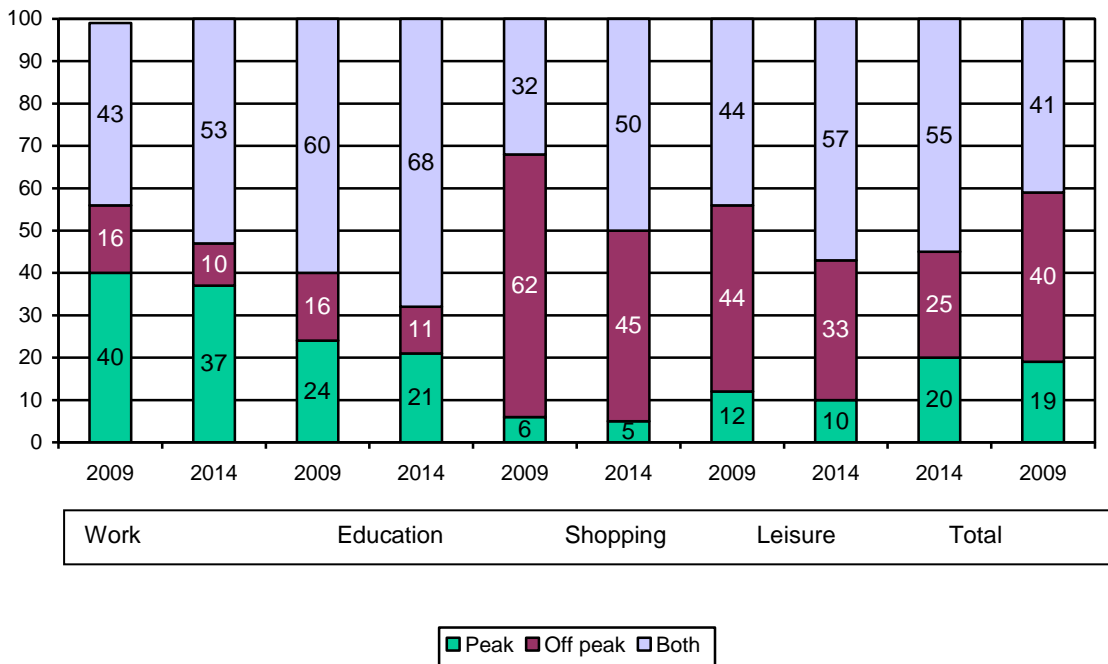


- Increases in both peak/off peak travel were noted amongst all groups.
- Commuters were most likely to travel during the peak (42%), albeit this dipped slightly from 47% recorded in 2009 while peak/off peak use increased to 51%.
- Scholars were also more likely to travel at both peak/off peak times (60%). There was an increase in peak use (35%) and a decline in off peak use (5%).
- Shoppers were most likely to travel in the off peak, albeit this figure declined to 53%, with peak/off peak use increasing to 43%.
- Leisure users also saw peak/off peak use increase to 56% albeit 33% travelled during the off peak alone.

4.2.2

Return journey: Similarly there was an increase in return journeys made at both peak/off peak times (55% 2014; 41%, 2009), with a decline in off peak travel (40%, 2009; 25% 2014). There was little change in the proportion travelling in the peak alone (20%). **Figure 15 and Appendices 11c and 11d.**

Figure 15 : Usual Time Of Return Journey 2009/2014



- The increase in peak/off peak return travel was noted amongst all user groups.
- Commuters at 37% were most likely to return in the peak, albeit this had dipped compared to 2009. Peak/off peak travel increased to 53%.
- Scholars were most likely to make return trips at both peak/off peak times (68%). Peak travel declined to 21% and off peak travel to 11%.
- Travel during peak/off peak times increased to 50% amongst shoppers, albeit 45% travelled during off peak times only.
- The proportion of Leisure users travelling during peak/off peak also increased to 57%. Off peak travel declined to a third (33%).

4.3 **TICKET TYPE PURCHASED**

4.3.1 Respondents were asked what type of ticket they purchased for travel on the bus network. In summary and perhaps as a result of the increase in Commuters and Scholars there was an increase in the proportion using a season ticket (40% 2014; compared to 34% 2009). The proportion using cash fares (37% 2014 compared to 39% 2009) concessionary passes (23% 2014 compared to 26% 2009) declined. **See Table 4 and Appendices 12a to 12c.**

Table 4 - Ticket Type Tendered By Journey Purpose And Day Of Travel

	2014	Commuters	Scholars	Other Weekday	Saturday	2009
Single/return	13	11	8	16	16	24
NX Daysaver	22	20	17	27	20	11
Bus/Metro day ticket	1	1	0	1	3	0
nDaytripper	0	0	0	0	0	3
Other Cash Fare	0	0	0	1	0	0
Cash Fare Total	37	32	27	45	39	39
NX Faresaver	13	27	8	5	4	17
Student Faresaver NX	4	1	26	1	2	4
NX Regional Travelcard	11	20	10	3	7	2
NX Off Peak Travelcard	1	1	0	1	0	2
nbus (multit operator)	4	8	3	1	2	2
nnetwork (multi modal)	3	4	4	1	1	3
nnetwork off peak	0	0	0	0	0	1
nnetwork student	3	0	16	1	2	3
Swift	0	1	0	0	0	0
Other season ticket	1	1	1	0	0	0
Season ticket total	40	65	72	14	19	34
Concessionary pass	23	4	2	41	42	26
Total	3639	1325	461	1396	457	

4.3.2 **Cash Fares:** In terms of cash fares purchased there was a significant increase in the proportion using a NX Daysaver (22%, 2014; 11%, 2009) and a decline in single/return ticket purchase (13% 2014; 24% 2009). There was also a decrease in nDaytripper use (0%, 2014; 3% 2009).

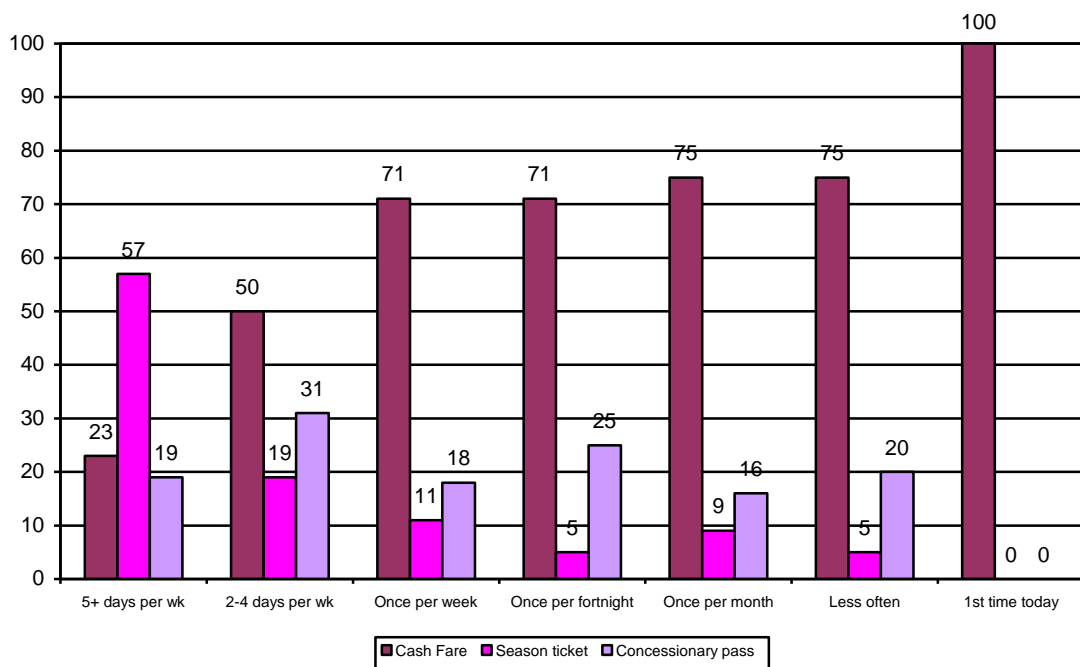
4.3.3 **Season Tickets :** When looking at season ticket use in more detail it can be seen that tickets valid purely on NXWM services were increasingly dominant (29%, 2014%; 25% 2009). The NX Faresaver was the most commonly used season ticket overall (13%), albeit use decreased slightly compared to 2009. At the same time there was an increase in use of the NX Regional Travelcard (11%). 4% each purchased either a Student Faresaver or an nbus. There was a decrease in the purchase of off peak tickets - which is understandable considering the dip in travel at this time.

- 65% of commuters used a season ticket with Faresavers (27%) and Regional Travelcards (11%) being most popular, an additional 8% used an nbus ticket. A third of commuters travelled using a cash fare, with 20% purchasing a Daysaver and 11% a single/return.
- 72% of scholars used a season ticket with the Student Faresaver (26%) being most popular, an additional 16% using nnetwork Student. 27% used a cash fare with the Daysaver (17%) being most popular.

- Travel for other weekday purposes tended to be made by some form of cash fare (45%) or concessionary pass (41%). In terms of cash fare used, 27% used a Daysaver, however 16% used a single fare.
- Saturday travel was largely made by those using a concessionary pass (42%) or a cash fare (39%). 20% used a Daysaver and 16% a single/return.

4.3.4 When looking at ticket type purchased by frequency of travel it is positive to see that those travelling most regularly tended to take advantage of season tickets (57%, daily users), although 23% relied on a cash fare, 16% of these took advantage of the discounts offer by using a Daysaver. Season ticket use dipped to 19% amongst those travelling 2-4 days per week with half reliant on a cash fare – again in particular the Daysaver ticket (29%). See Appendix 24b and Figure 16.

Figure 16 : Ticket Type Purchased By Frequency Of Travel



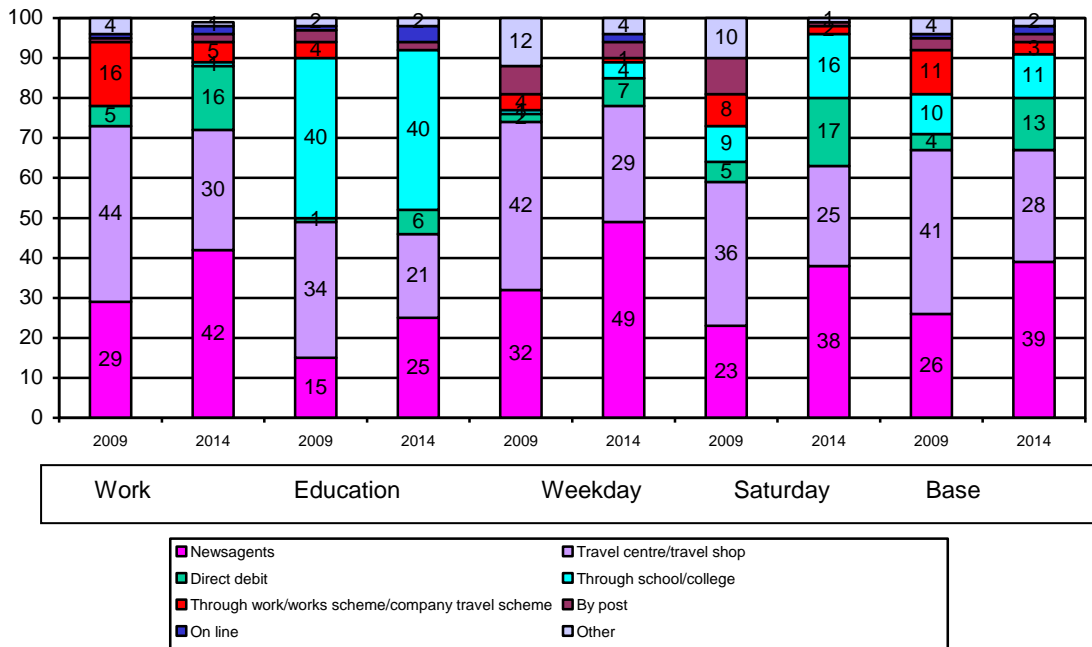
4.4 OUTLETS USED TO PURCHASE TICKETS

4.4.1 Season ticket holders were asked where they purchased their passes. As Figure 17 illustrates there are significant changes compared to 2009. See Appendices 13a and 13b.

4.4.2 There was an increase in the use of newsagents (39%, 2014; 26%, 2009) with this method now being the most popular way to purchase tickets. Direct debit use increased to 13% (4% 2009). The proportion using TIC’s declined (28% 2014; 41% 2009) as did the proportion using workplace schemes which only

accounted for 3%. Use of school travel schemes remained high at 11%.

Figure 17 : Outlet Used To Purchase Tickets 2009/14 Compared

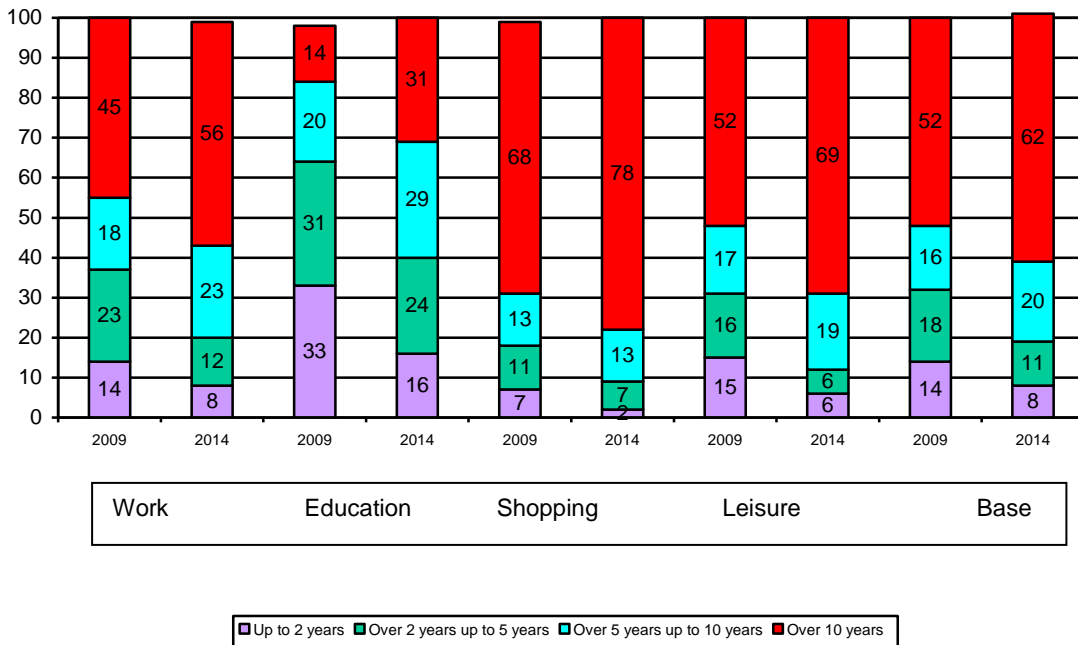


- Commuters saw an increase in the use of newsagents (42%) and in Direct Debit (16%). At the same time there was a decrease in the use of TIC's (30%) and in work place schemes (from 16% 2009 to 5% 2014).
- Purchasing tickets through college continued to be the most common way for scholars to buy tickets (40%). Scholars also saw an increase in the use of newsagents (25%) with a decrease in the use of TIC's (21%).
- Other weekday users were increasingly likely to purchase tickets at newsagents (49%) with a decrease in TIC use (29%).

4.5 LONGEVITY OF BUS USE

4.5.1 Respondents were asked how long they had been travelling by bus in the West Midlands. In summary there was a significant increase in the proportion that had been using the bus for over 10 years (62%) and in those who had been using the bus between 5 and 10 year (20%). There was a decrease in those using bus services for less than 2 years (8%, 2014 compared to 14% 2009). **See Figure 18 and Appendices 14a and 14c.**

Figure 18 : Longevity Of Use By Journey Purpose 2009/14



- The increase in longevity of use was noted across all user groups.
- Scholars were most likely to be more recent users at 16% - albeit this figure stood at 33% in 2009, 31% of scholars stating they had used bus services for over 10 year (14%, 2009).
- 56% of commuters had also been travelling by bus for over 10 years, with just 8% newer users (14%, 2009).
- Shoppers continued to have the largest proportion of long term users with this increasing to 78%. Only 2% of shoppers had been travelling by bus for less than 2 years.
- Other leisure users were also long term bus users (69%, over 10 years). With just 6% more recent users to the market.

4.6 **MODE OF TRAVEL TO OUTWARD BUS STOP**

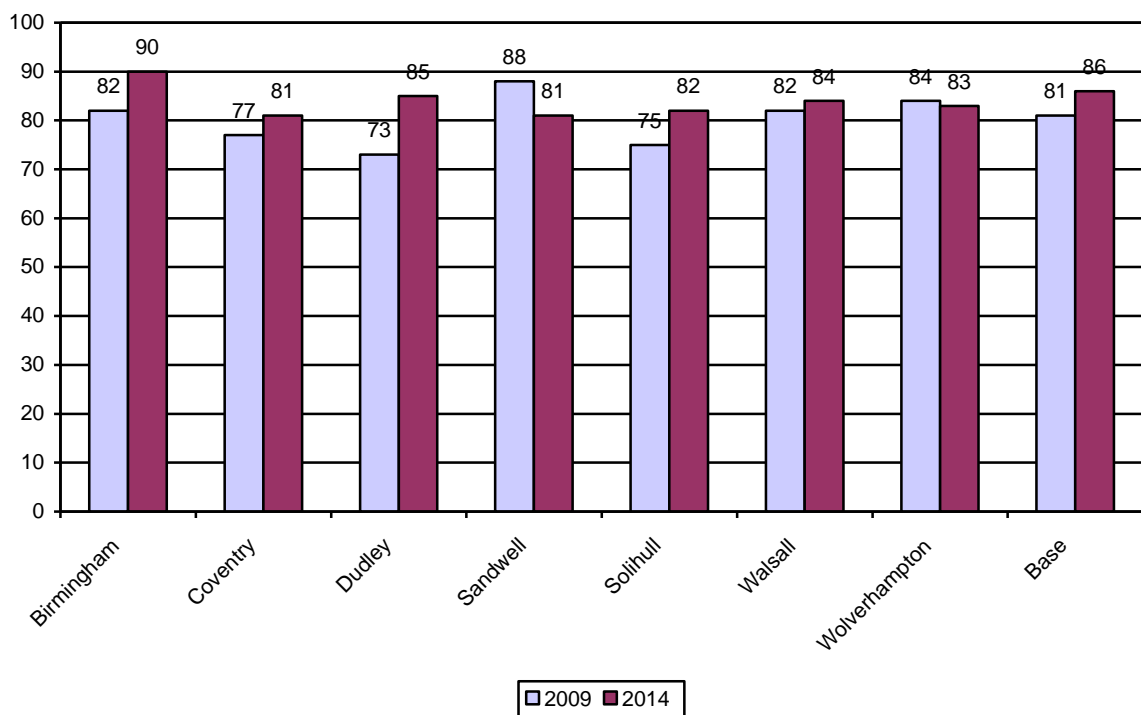
4.6.1 Respondents were asked how they travelled to their outward bus stop. There was little change from 2009 with the overwhelming majority of users walking to their bus stop (98%). Walking was the main mode of travel amongst all users regardless of district or journey purpose. Just 2% travelled as a car passenger, travel by other modes accounted for less than 1%. **See Appendices 15a and 15b.**

4.7 **SHELTER PROVISION AT BOARDING LOCATION**

4.7.1 Positively there has been an increase in shelter provision at outward stops with 86% of stops having a shelter (81%, 2009).

- Commuters (87%) and scholars (89%) were most likely to have a shelter provided at their outward stop, this dipped to 83% amongst shoppers.
- Bus users in Birmingham were more likely to use a stop with a shelter (90%), while users in Coventry and Sandwell were least likely to have a shelter (81%).
- Shelter provision increased in the majority of districts – with the exception of Sandwell and Wolverhampton. **See Figure 19 and Appendices 16a and 16b.**

Figure 19 : Shelter Provision At Outward Stop By District 2009/2014 Compared



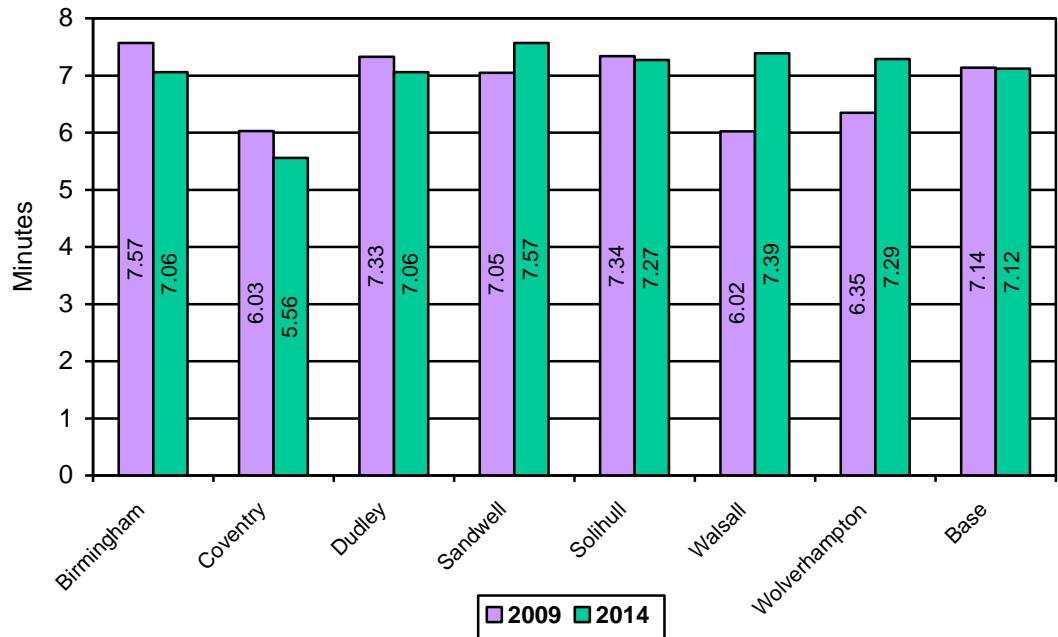
4.8

LENGTH OF TIME TAKEN TO TRAVEL TO OUTWARD STOP

4.8.1

The average journey time to outwards stops was 7 min and 12 sec, similar to that recorded in 2009 (7 min 14 secs). Walkers who make up the bulk of users had the shortest journey time (7 mins 07 sec). The small proportion of car passengers (9 min and 27 sec and rail users (16 mins) had longer journey times. **See Figure 20 and Appendices 17a to 17c.**

Figure 20 : Average Length Of Time Taken To Travel To Stop By District 2009/14 Compared



4.8.2

Figure 20 looks at average journey time to stop by district.

- Bus users in Coventry (5 mins 56 secs) had by far the shortest journey times, the only district to record a journey time of under 7 minutes.
- Bus users in Sandwell (7 mins 27 secs) and Walsall (7 mins 39 secs) had the longest journey time to stop.

4.9

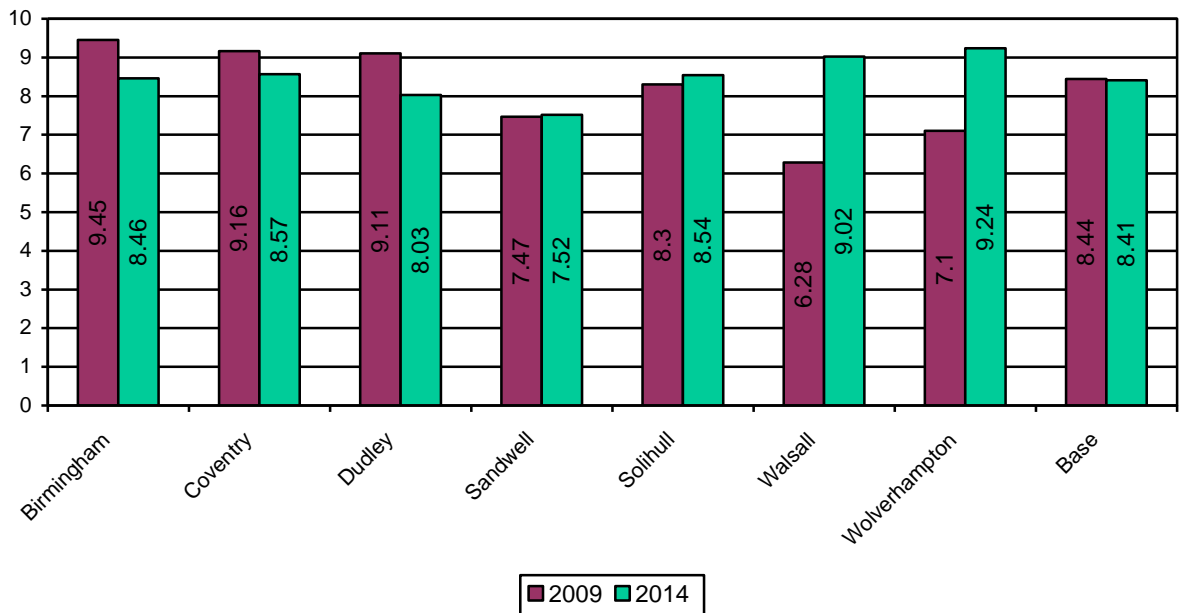
USUAL WAIT TIME AT OUTWARD STOP

4.9.1

The average wait times at outward stops was 8 min 41 sec, a similar response to that give in 2009 (8 min 44 sec). **See Figure 21 and Appendices 18a and 18b.**

- Scholars (8 min 27 secs) and commuters (8 mins 43 secs) who travel in the peak where buses are more regular had the shortest wait times, while leisure uses (9 min 4 secs) had the longest.
- In terms of district users in Sandwell had the shortest at stop wait time (7 min 52 secs) followed by users in Dudley (8 mins 3 secs).
- Bus users in Wolverhampton (9 mins 24 secs) and Walsall (9 mins 2 secs) had the longest wait times.
- There were decreases in wait times for bus users in Birmingham, Coventry and Dudley.
- In contrast there were significant increases in wait times for bus users in Walsall and Wolverhampton.

Figure 21 : Usual Wait Time By District



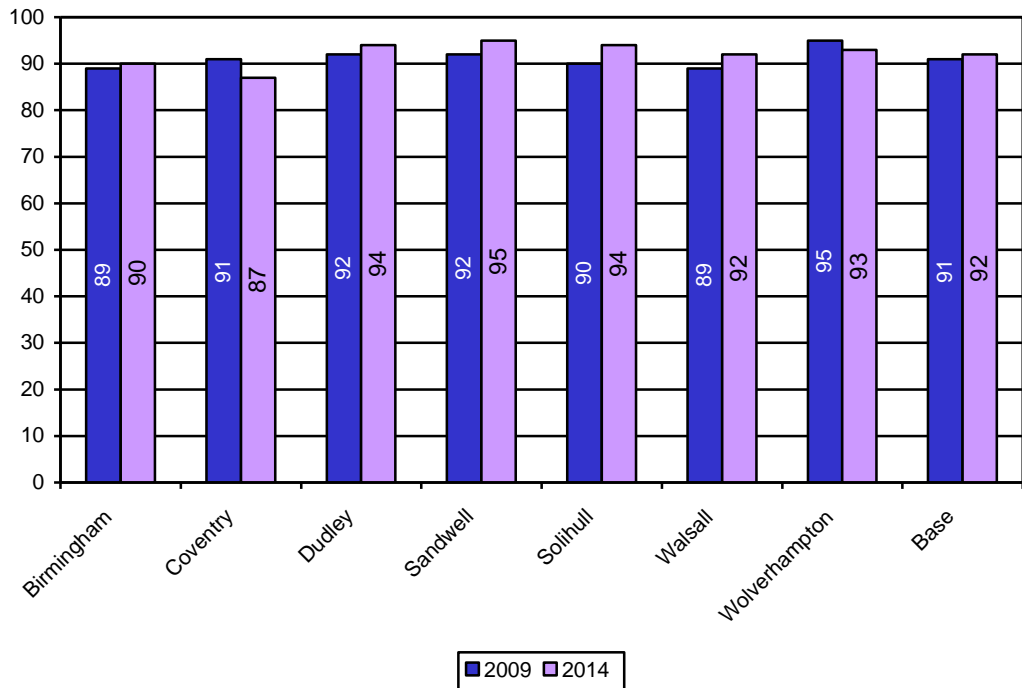
4.10 MODE OF TRAVEL TO RETURN STOP

4.10.1 The sub group of users who made a return trip by bus were asked how they usually travelled to their return stop. At 99% the overwhelming response was to walk. Understandably walking was the most common mode of travel regardless of journey purpose or district. **See Appendices 19a and 19b.**

4.11 PRESENCE OF SHELTER AT RETURN STOPS

4.11.1 Shelter provision remained more likely at return stops than at outward stops (92%) and had indeed increased since 2009 (88%). This is potentially due to these journeys being more likely to start in town/city centres with higher level of shelter provision than in residential areas. Shelter provision was high in all areas – above 90% - with the exception of Coventry where shelter provision dipped to (87%). **See Figure 22 and Appendices 20a and 20b.**

**Figure 22 - Shelter Provision At Return Stop By District
2009/2014 Compared**



4.12

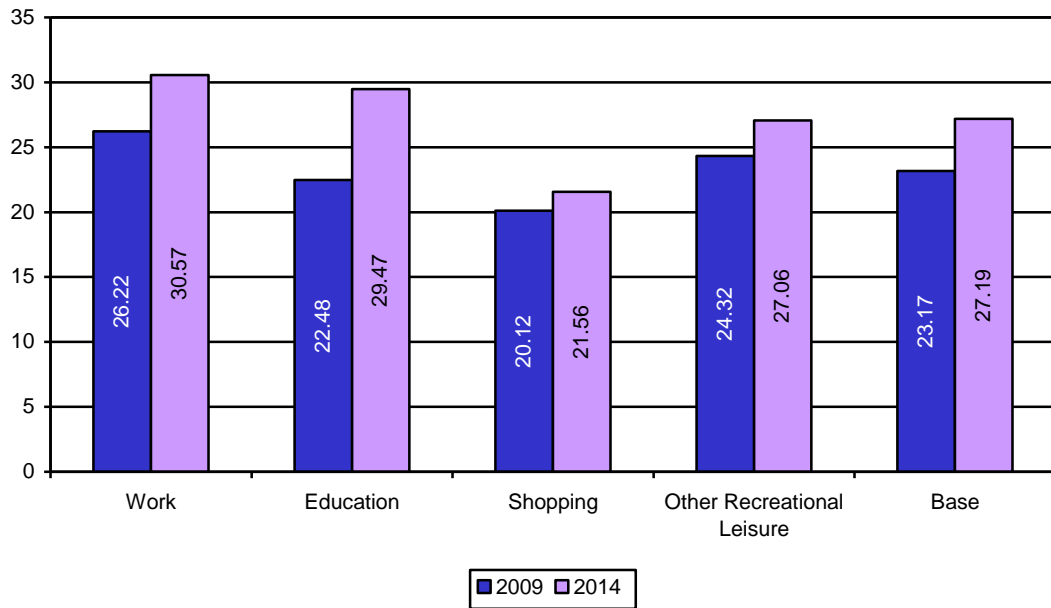
LENGTH OF TIME TAKEN TO TRAVEL BY BUS

4.12.1

Respondents were asked how long they travelled on the bus itself when making their usual journey (NB respondents using more than one bus were asked to think of the total time spent travelling). The average bus journey time had increased significantly since 2009 - from 23 mins 17secs to 27 mins 19 secs. Journey times increased across all journey purposes and in all districts. **See Figure 23 and Appendices 21a and 21b.**

- Commuters (30 mins 57 secs) and scholars (29 mins 47 secs), who are more likely to travel in the peak where roads are more congested, had the longest travel times seeing the most significant increases on 2009.
- Shoppers had the shortest journey time (21 mins 56 secs) and the lowest increase compared to 2009.
- In terms of district average journey times were longest in Coventry (29 mins : 46 secs) and Solihull (29 mins 42 secs). Indeed bus users in Solihull saw the biggest increase in journey times of over 10 minutes.
- At 22 mins 46 secs Sandwell had the shortest journey time.

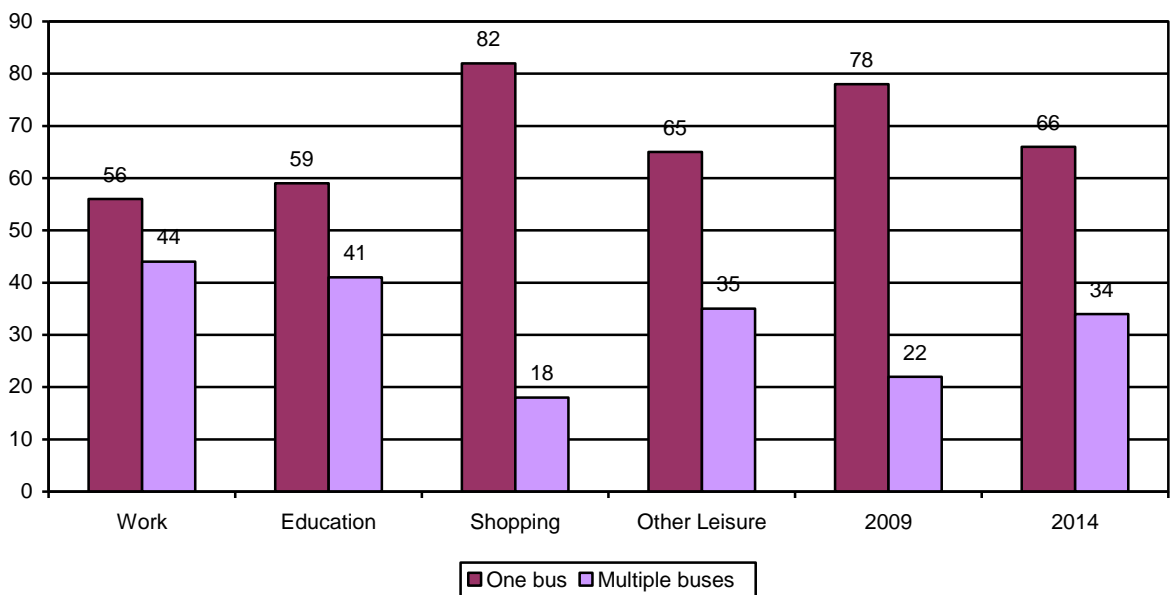
Figure 23 – Usual Journey Time By Main Journey Purpose 2009/14



4.13 NUMBER OF BUSES USED TO GET TO DESTINATION

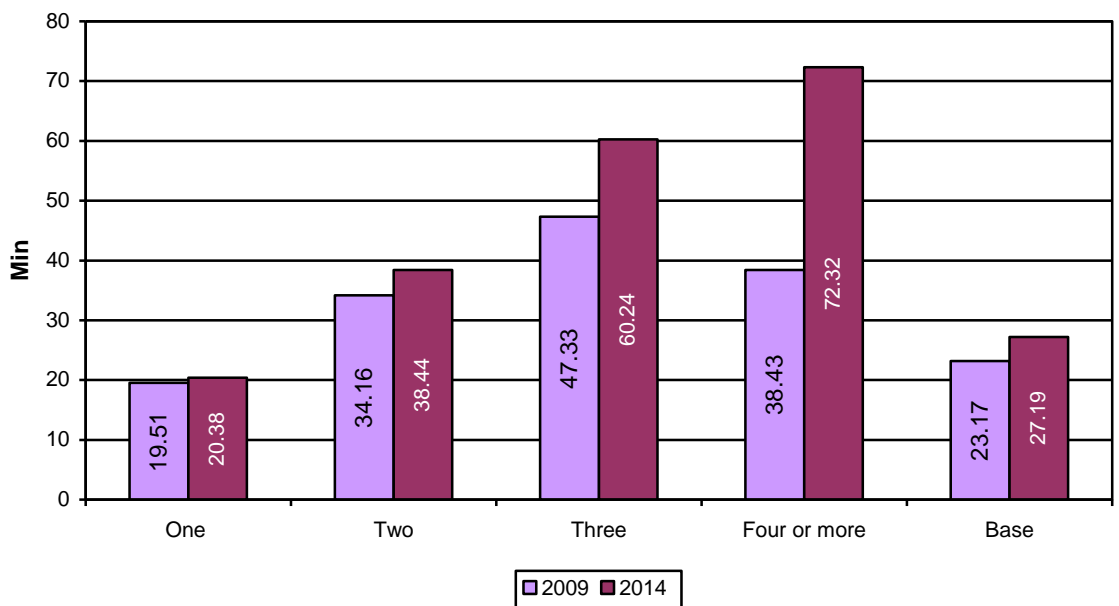
4.13.1 As well as congestion some of the increases in journey times can partly be explained when looking at the number of buses respondents use to reach their final destination. Although the majority could reach their destination catching only one bus (66%) there has been a significant increase in the proportion needing to catch more than one bus (34% 2014; 22% 2009). See Figure 24 and Appendix 22a to 22c.

Figure 24 : Percentage Using One Bus To Reach Destination 2009/2014 Compared



- The increase in the amount of buses used to reach a destination was noted amongst all users groups.
- Commuters (44%) and scholars (41%) were most likely to have to catch multiple buses to reach their destination.
- 34% of leisure users also had to catch more than one bus.
- Shoppers were most likely to only have to use one bus (82%) – just 18% used multiple buses.
- Users in Coventry were most likely to have to catch more than one bus (37%), closely followed by respondents in Birmingham and Wolverhampton (36%).

Figure 25 : Average Bus Journey Times By Amount Of Buses Caught 2009/2014 Compared



4.13.2 **Figure 25** compares average journey times by the number of buses caught to make a journey. Understandably journey time's increase with the amount of buses caught to reach a destination rising from 20 mins 38 secs for those that caught one bus to 60 mins 24 secs for those that caught 3 or more buses (NB only 13 respondents caught 4 buses or more). There were significant increases in journey times for those that had to catch multiple bus services to reach their final destination compared to 2009. In comparison there was only a marginal increase in journey times amongst those who caught one bus.

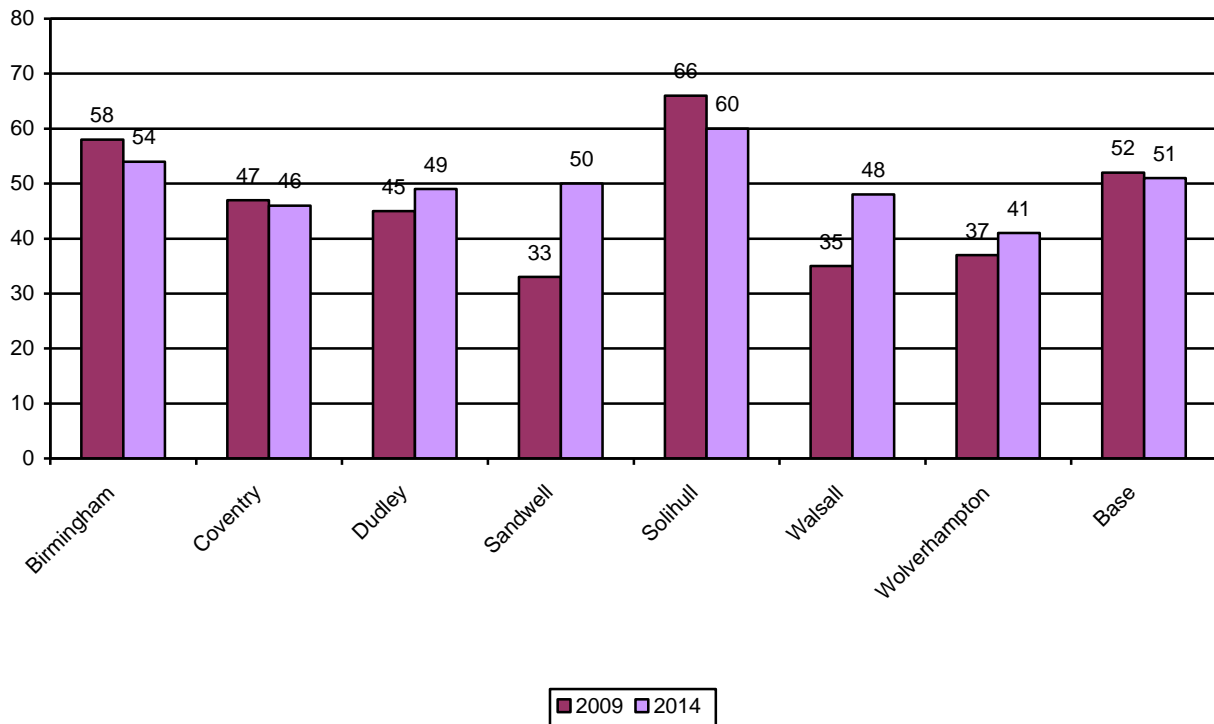
4.14 **BUS COMPANY COMPETITION**

4.14.1 Respondents were asked if they had a choice of bus operator on their usual bus route. On their usual bus journey just over half of users (51%) said they had a choice of operators, little significant difference to the 49% recorded in 2009. 41% stated

that only one company operated along their usual bus route, while 8% were unsure. **See Figure 26 and Appendices 23a and 23b.**

- Choice of bus operators varied little by journey purpose, varying more by district.
- Respondents in Solihull were most likely to have a choice of bus operators (60%) as did 54% of bus users in Birmingham. However there was a decline in multiple bus operators noted in both areas.
- Users in Coventry (46%) and Wolverhampton (41%) were least likely to have a choice of operators.

Figure 26 : Percentage Of Routes With Multiple Bus Operator 2009/2014 Compared

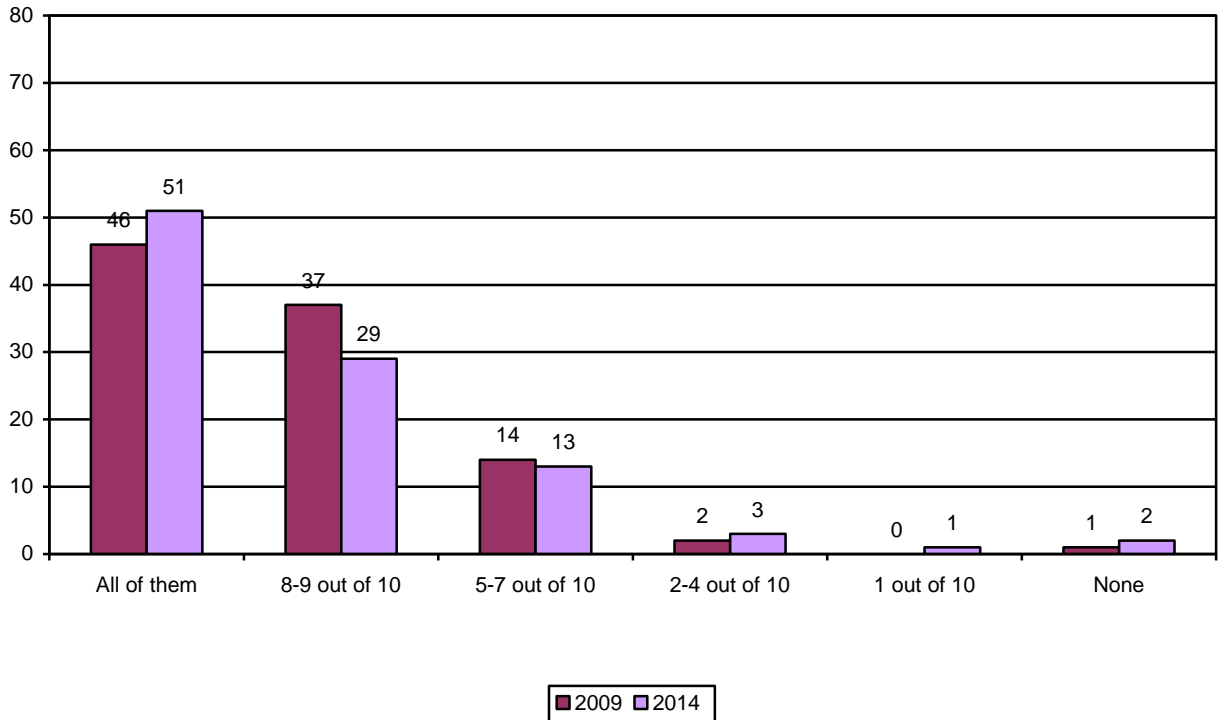


4.15 **PROPORTION OF NXWM BUS JOURNEYS**

4.15.1 Respondents whose usual route had multiple bus operators were asked to give the proportion of NXWM bus journeys they made (out of the last 10 journeys). As **Figure 27** illustrates there was an increase in the proportion who had made all their journeys by NXWM service (51%, 2014 compared to 46% 2009). 29% had made 80-90% of their last 10 trips by NXWM services and 13% 50-70%. The dominance of NXWM buses is further noted by only 2% of respondents stating they made none

of their last 10 journeys by NXWM. . See Appendices 24a and 24b.

Figure 27: Proportion Of NXWM Bus Trips Out Of The Last Ten



- Scholars (62%) and commuters (57%) were most likely to have made all of their last 10 journeys by NX services.
- Shoppers (42%) and Leisure users (46%) were less reliant on NX services.
- In terms of district users in Coventry (67%) and Solihull (60%) were most reliant on NX services, this despite the fact that Solihull bus users were most likely to state they had a choice of bus operators.
- Over half of users in Birmingham (53%) and Wolverhampton (53%) were also reliant on NX services for all of their journeys.
- Respondents in Dudley (40%), Sandwell (41%) and Walsall (41%) were less reliant on NX services.

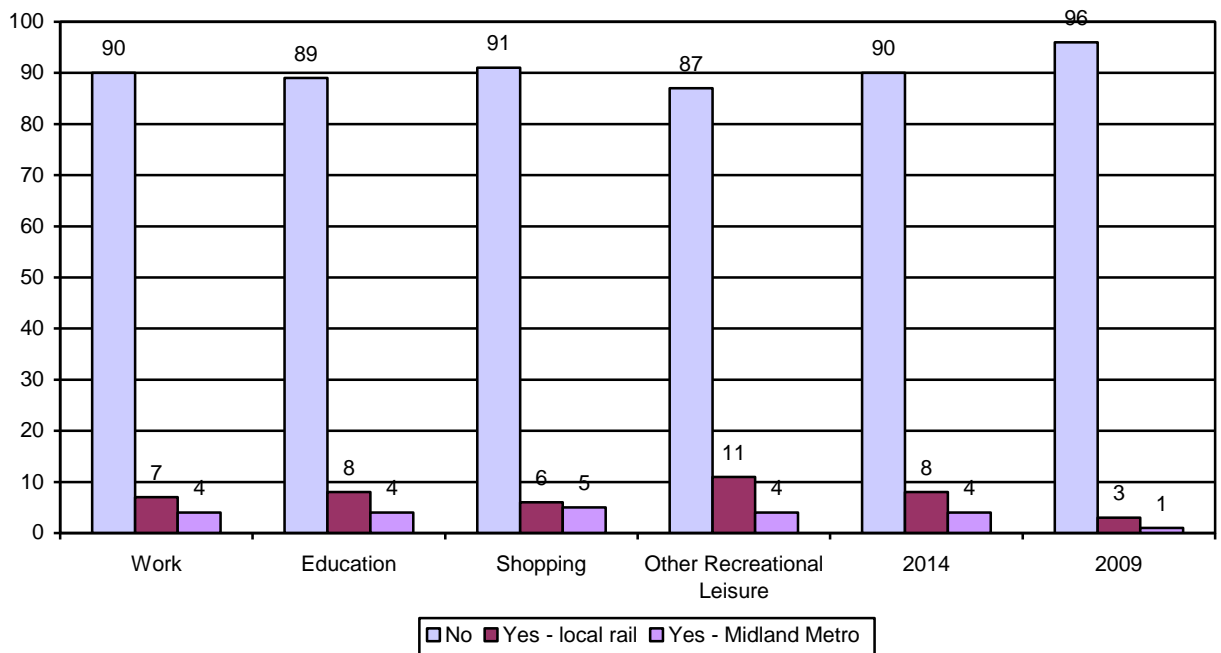
4.15.2

The increase in NX buses use can also partly be explained by the increase in purchases of NX only season tickets. NX only season tickets are far likely to use NX buses all the time/most of the time (92% Faresaver users) than holders of nbus tickets (55%, nbus). See Appendix 24c.

4.16 LEVEL OF RAIL/METRO USE ON USUAL BUS JOURNEY

4.16.1 The vast majority of respondents did not travel by rail or Metro as part of their usual bus journey (90%), this is a slight decrease on the 96% reported in 2009. 8% travelled by local rail (3% , 2009) while 4% travelled by Metro (1%, 2009). **See Figure 28 and Appendices 25a and 25b.**

Figure 28 : Travel By Other Modes On Usual Bus Journey By Main Journey Purpose 2009/14



- Leisure users were most likely to use another mode of travel when making their usual bus journey (13%), followed by Scholars (11%).
- In terms of district respondents in Wolverhampton were most likely to travel by other modes with 16% travelling by Metro, this was followed by respondents in Sandwell with 12% travelling by Metro.
- Respondents in Solihull (3%) and Coventry (4%) were least likely to travel by other modes.

4.17 MAIN REASONS FOR BUS USE

4.17.1 Respondents were asked why they travelled by bus rather than any other mode. As in 2009 the main reason was *no car/don't drive* (71%), a further 5% said *no car was available/being used by another member of the household*. 7% felt that they had *no choice it was the only method available*. 4% each felt they *don't like driving/don't have to worry about driving* or felt they *didn't*

have to worry about parking costs. See Appendix 26a and 26b.

- 4.17.2 *Having no car/don't drive was the main reason for travel amongst respondents in all districts and across all journey purposes rising to 76% amongst scholars and accounting for 77% of users in Birmingham.*

Table 5 : Main Reasons For Bus Use By Car Availability

	2009	2014
No car/don't drive	50	71
No choice/only method available	9	7
Car not available/being used by other member of household	9	5
Don't have to worry about/pay costs of parking	6	4
Bus is cheaper than other methods	5	4
Have a bus pass	9	2
Bus is quicker than other methods	4	2
Convenience/Easier	2	2
Don't like driving/don't have to worry about driving	2	1
Don't know	1	0
Other	1	0
Bus service is frequent	2	0
Base	3667	3741

4.18 CHANGES IN BUS TRAVEL OVER THE LAST 12 MONTHS

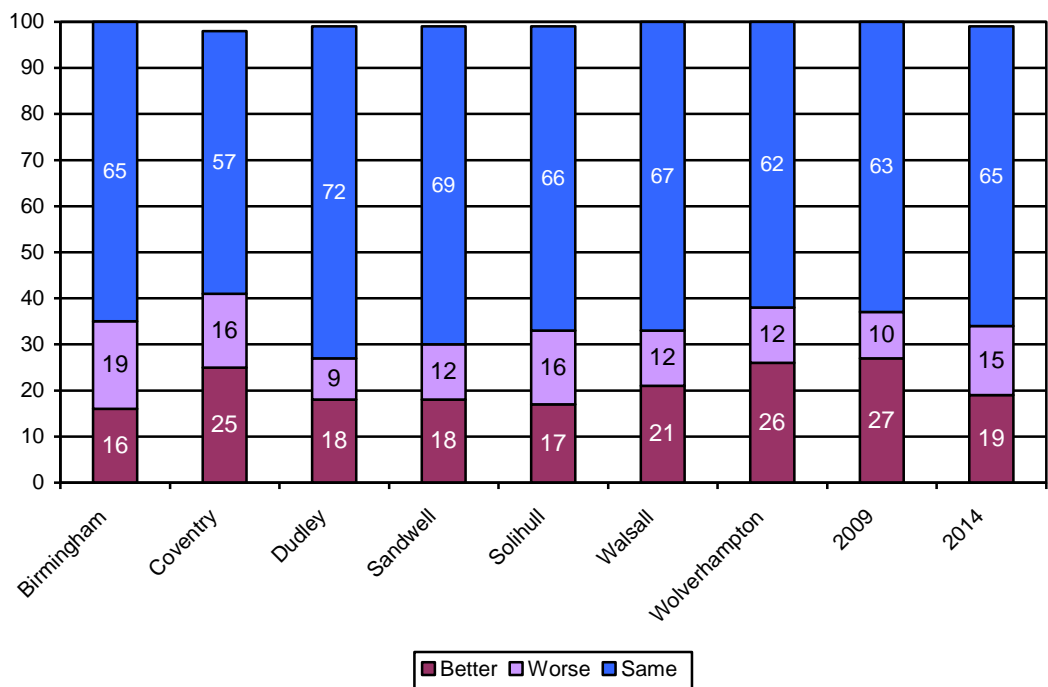
- 4.18.1 Users who had been travelling by bus for over 12 months were asked if they were using bus services more, less or the same amount as 12 months ago. The majority (75%) stated that there was no difference in use, however 19% noted they were using buses more often and just 5% that they were using buses less often. These figure mark little change to those recorded in 2009. Increased bus use was most common in Dudley (27%) and Walsall (25%) and amongst Scholars (33%). **See Appendices 27a and 27b.**

4.19 OPINION ON BUS TRAVEL OVER LAST 12 MONTHS

- 4.19.1 Users travelling by bus for over 12 months were also asked if they thought that the bus service had improved, got worse or stayed the same over the last year. 65% noted no change in bus services, however 19% thought they had got better while 15% thought they had got worse. Compared to 2009 there was an increase in the proportion who thought the service had got worse and a decrease in those who thought they had got better.

4.19.2 Opinion on bus services varied most by district with users in Wolverhampton (26%) and Coventry (25%) most likely to think services had got better. Respondents in Birmingham (19%) were most likely to think that the service had got worse. See **Figure 29 and Appendices 28a and 28b.**

Figure 29 : Opinion On Bus Services Over Last 12 Months



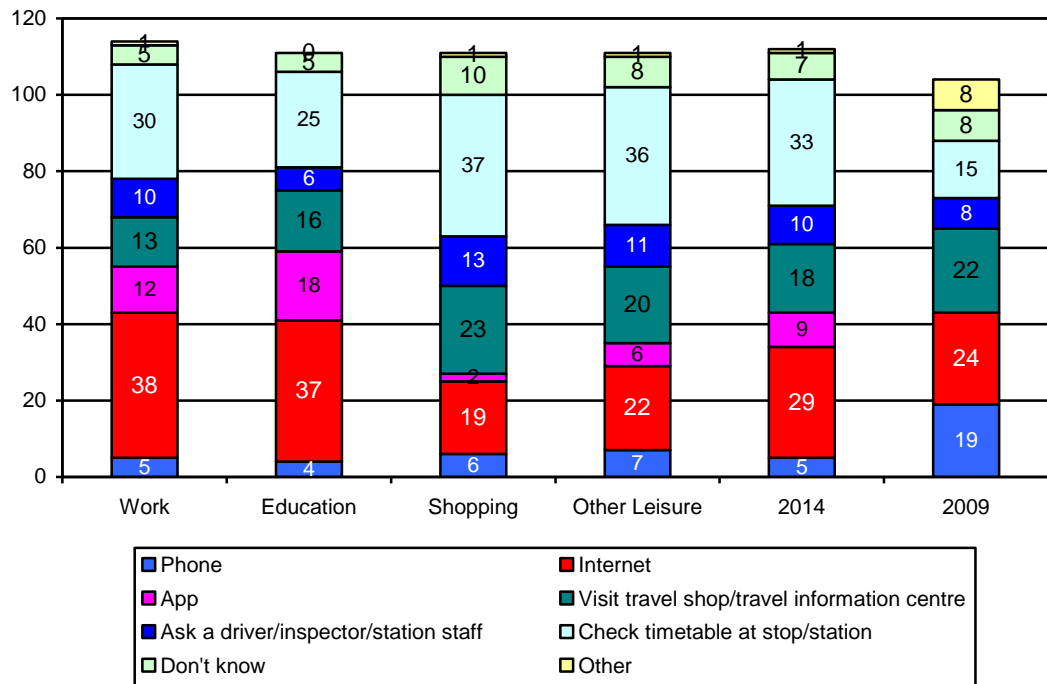
4.20 SOURCES OF BUS INFORMATION

4.20.1 Respondents were asked how they would obtain information on bus services. In summary 33% would check the timetable at stop, 29% would check the internet, while 18% would use a TIC/Travel shop. 10% would ask the driver while 9% would use Apps and 5% would phone a travel line. The proportion who would check timetables and use the internet had increased since 2009, while the proportion using travel shops and the phone lines had declined. See **Figure 30 and Appendices 29a and 29b.**

- Use of the internet was most common amongst commuters (38%) and scholars (37%).
- App use was also higher amongst Scholars (18%) and commuters (12%).
- Use of the timetable at stop was most common amongst shoppers (37%) and other leisure users (36%).
- Visiting the Travel shop was most common amongst shoppers (23%) and other leisure users (20%).

Figure 30 : Main Sources Of Information

% exceed 100 due to multiple responses



4.20.2 **Website use:** At 14% the most commonly used website was www.networkwestmidlands.com followed by [www.nxbuses](http://www.nxbuses.com) (4%) There was an increase in the use of the Network West Midlands website (10% 2009) with a slight decrease in the use on NX web site (6% 2009).

4.20.3 **Mobile App use:** 9% of bus users used mobile Apps. At 6% the widest used App was NX West Midlands, indeed use of this App rose to 13% amongst the more youthful scholar market. 2% made use of the Network West Midlands App. The high level of use of the NX app could explain the dip in use of the NX website.

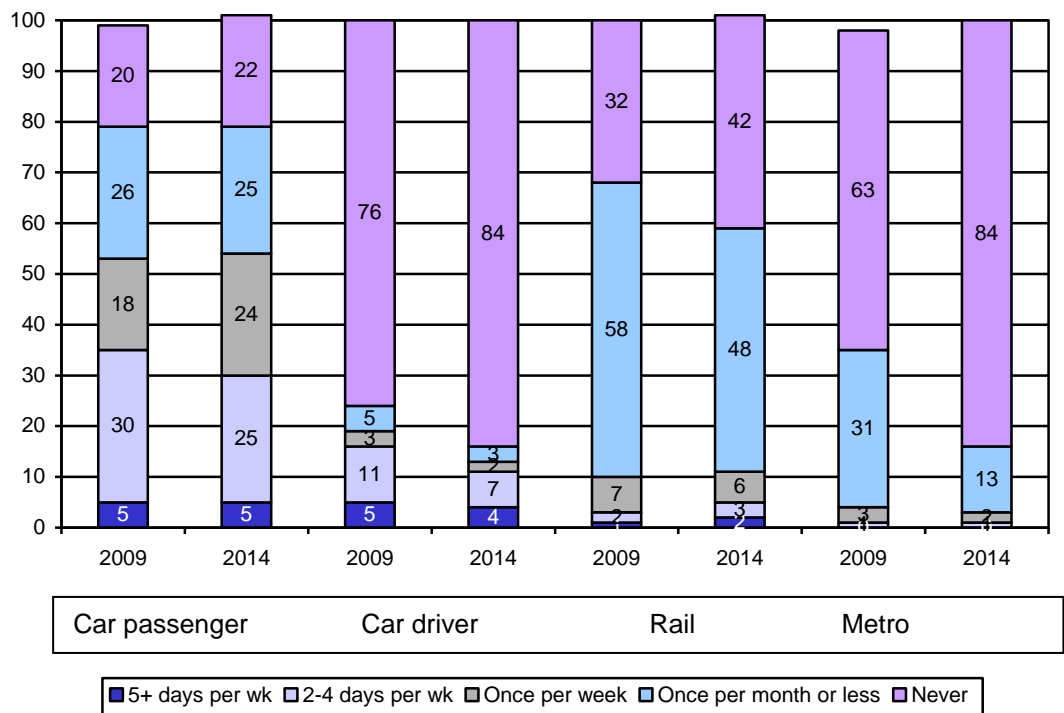
4.21 FREQUENCY OF TRAVEL BY OTHER MODES

- 4.21.1 Bus users were asked how frequently they travelled by other modes. **See Figure 31 and Appendices 30a to 30o.**
- Travel as a car passenger was the next most common mode of travel with 54% travelling this way weekly, a similar proportion to that recorded in 2009.
 - Weekly travel as a car passenger was highest amongst scholars (70%) dipping to 46% amongst shoppers.
 - Travel as a car driver stood at 13% weekly; a slight decline from the 18% recorded in 2009 and reflecting the lower

levels of car availability. 84% never travelled as a car driver an increase on the 76% recorded in 2009.

- Weekly car driving was low amongst all groups peaking at 15% amongst leisure users and to 14% amongst shoppers.
- Only 10% of bus users travelled weekly by rail, a figure similar to that recorded in 2009. 42% stated that they never travelled by rail.
- Scholars (14%) and other leisure users (13%) were most likely to travel weekly by rail.
- Only 3% of bus users stated that they travelled weekly by Metro with 84% stating they never travelled by this mode.
- Weekly Metro use peaked at 10% in Wolverhampton and 8% in Sandwell. It varied little by journey purpose.
- Only 2% of respondents cycled weekly (no comparable data to 2009). With 96% stating that they never travelled in this way.

Figure 31 : Frequency Of Travel By Other Modes



4.22

USE OF SOCIAL MEDIA

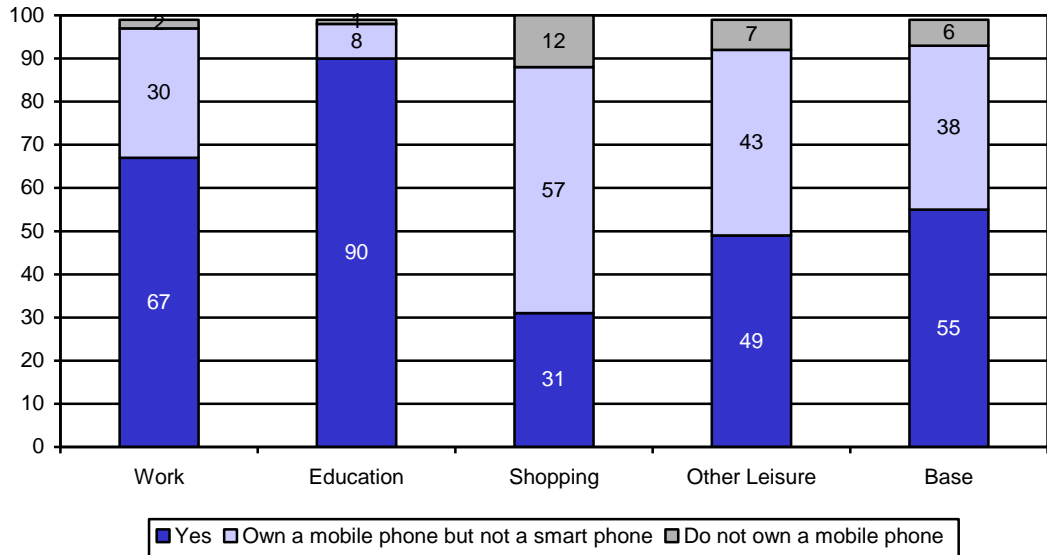
4.22.1

Bus users were asked about their access to and use of social media. 55% of bus users had a Smartphone, a figure lower than the national average of 62% (Source Ofcom 2014). 38% owned a mobile phone (but not a Smartphone) while 6% did not own a mobile phone. **See Figure 32 and Appendices 31a and 31b.**

- Smartphone ownership peaked at 90% amongst scholars and was higher amongst commuters (67%).

- Only 31% of shoppers owned a Smartphone, Smartphone ownership dipped to 6% amongst the over 65's.

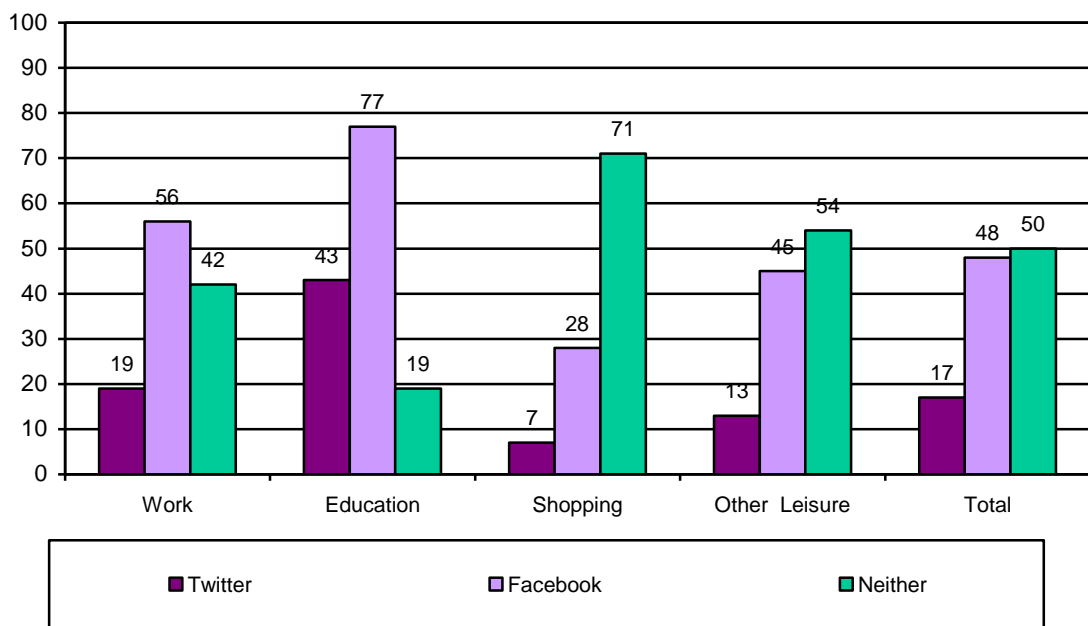
Figure 32 : Smartphone Ownership By Journey Type



4.22.2

Bus users were also asked about their use of social media. At 48% Facebook was the widest user base, followed by Twitter at 17%. However half of bus users (50%) used neither Facebook or Twitter. See Figure 33 and Appendices 31c and 32d.

Figure 33 : Use Of Social Media



- As one might expect scholars were the biggest users of social media with 77% using Facebook and 43% Twitter. Only 19% of scholars used neither social network site.
- 56% of commuters also used Facebook and 19% Twitter; however 46% used neither form of social media.
- Shoppers were least likely to use social media (71%), with just 28% using Facebook and 7% Twitter.

5.0 **CONCLUSION**

- 5.1 In terms of user profile there were a few changes from 2009. Users continued to be largely female with significant proportions being youthful (under 25) or elderly (over 60), however the proportion of youthful respondents had increased since 2009, while there were fewer elderly users. Bus users remained less affluent than the conurbation as a whole and came from homes with low levels of car ownership. Non car ownership and car availability continue to be the most decisive elements of the bus market with the overwhelming majority reliant on bus for travel, indeed since 2009 there was an increase in users who stated a car was unavailable for travel. Reasons for bus use continued to be centred on not having a car and having no other option, with bus continuing to be the mode of last resort.
- 5.2 Work and shopping remained the main reasons for bus use, however compared to 2009 there was an increase in commuters and scholars, perhaps as a result of an improvement in the economy which was still in recession in 2009, this was further reflected by more bus users being in full time work. The increase in commuter and scholars has also resulted in an increase in daily bus use. Leisure use and shopping had declined since 2009 reflecting the fact that although employment figures are increasing; wages and the level of disposal income people have are on the decline. In terms of travel time it was interesting to note the increasing flexibility of the bus market with more users travelling at both peak/off peak times, as a result of this the proportion of users stating they travelled in the off peak alone decreased significantly.
- 5.3 Perhaps as a result of the increase in the commuting and scholar market there was an increase in the proportion using season tickets. In terms of ticket type those provided by NXWM were by far the most commonly purchased, with the proportion increasing since 2009. There was a decrease in the purchase of off peak tickets, perhaps as a result of the decline in off peak travel. There were significant changes in the proportion of respondents using Daysaver tickets rather than single cash fares, with NX price strategy meaning there is little advantage in buying a single ticket and bus users being sensible enough to opt for a cost effective way of travelling using cash fares.
- 5.4 There was a change in the locations where users purchased their season tickets with an increase in the use of newsagents and direct debit and a decrease in the use of TIC's and workplace schemes. Purchasing tickets through schools and colleges continued to be very popular amongst scholars.

- 5.5 In terms of infrastructure there is much positive data to be commented on. Most users could walk to a bus stop in around 7 minutes and could access their stop on foot. Average wait times were less than 9 minutes, while at stop increasing proportions of users had a bus shelter provided. However users had significantly longer journey times compared to 2009, this is partly as a result of the increase in the proportion of users who have to use multiple buses to reach their destination, but it should be also noted that trips using multiple buses were taking significantly longer than in 2009. The increases in multiple bus use could be due to changes in bus services made under various Network Reviews over the last few years, or simply because bus users are more reliant on the bus to make all their journeys – regardless of distance they need to travel.
- 5.6 There was little change in term of the proportion of users who had a choice of bus operators on their journey, with just over half having a choice. However the proportion who stated they used multiple operators had dipped with the use of NX buses being increasingly prevalent, especially amongst commuters and scholars – reflecting the increase in use of NX only tickets.
- 5.7 In terms of use of information, timetables at stops and the internet proved to be the most popular information sources, followed by TIC's. The proportion who would check timetables and use the internet had increased while the proportion who would use TICs and phone lines had decreased. The use of mobile apps proved popular, especially amongst the young with the NX app being most popular. In terms of website networkwestmidland.com was used most.
- 5.8 The figure for Smartphone ownership amongst bus users was lower than that nationally with just over half of bus users owning a smartphone, echoing the elderly more economically deprived nature of the market, however Smartphone ownership peaked amongst scholars to 90%. In terms of use of social media half of bus users engaged with Facebook or Twitter, with this rising amongst scholars and commuters.
- 5.9 In summary the bus market remains very much the realm of the young, retired and less affluent – those without a car available to travel in. Positively there had been an increase in the proportion of commuters and scholars using services and in line with this an increase in season ticket use. Some groups of bus users, namely scholars and commuters, seem to be embracing new technology in terms of information with increases in use of the internet and mobile Apps, however it should be noted that due to the elderly less affluent nature of the bus market as a whole there are groups who are unable to access information in this way and rely on more traditional formats. Bus stops were more

likely to have a shelter provided, with travel times to stop and wait times of under 10 minutes. However journey times had increased significantly, whether this is a result of users needing to travel further to access jobs/education, increased congestion on the road or as a result to changes in bus route is outside the remit of this report. The challenge therefore remains to make bus a more attractive option to car users and indeed to maintain the youthful market as they enter employment and a potential future of car ownership. The latest customer satisfaction figures for bus have largely been positive, but these results are from existing users who largely have little choice but to use bus services, with the message seemingly being lost on car owners who largely continue to stay away from the bus market.