

West Yorkshire Combined Authority: BSIP Bus Network Enhancements and Superbus Survey



**West
Yorkshire
Combined
Authority**

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BUS STOP



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Background and Methodology

Background

Background

West Yorkshire Combined Authority have recently completed some major investment in bus services within West Yorkshire, with two schemes 'Network Enhancements' and 'Superbus'.

After Mayor's Fares these initiatives combined make up the second biggest investment in bus services within the West Yorkshire Bus Service Improvement Plan package. Network Enhancements and Superbus involve the introduction of some new services and some services with enhanced daytime and / or evening frequency, to improve passenger experience and boost patronage. This fieldwork has been undertaken after the introduction of Phases 1 and 1.5 of these service enhancements in 2024 and is intended to provide insights into the impact of this significant investment on buses in West Yorkshire.

The key objectives of this research are to answer the following questions:

1. Has the scheme delivered a more accessible, more inclusive, and safer bus network for all? Have any groups with protected characteristics particularly benefited?
2. Has the scheme increased bus usage in West Yorkshire? Has modal shift occurred as a result?
3. Has the scheme increased accessibility to economic, leisure, cultural and/or service hubs? Has the scheme provided links to new growth opportunities?
4. How has the scheme impacted on bus passengers? How has the scheme improved passenger perceptions of and confidence in bus services?

Background context

Bus usage changes

Please note that in measuring bus use changes, we are only speaking to current bus users – so we anticipate that actual change in use will be less than reported, as we would not speak to anyone who no longer travels by bus.

Additionally, we anticipate that some change in bus usage will have taken place in the past year unrelated to the service changes, as a result of changes in working from home policies and less concern about covid compared to late 2023.

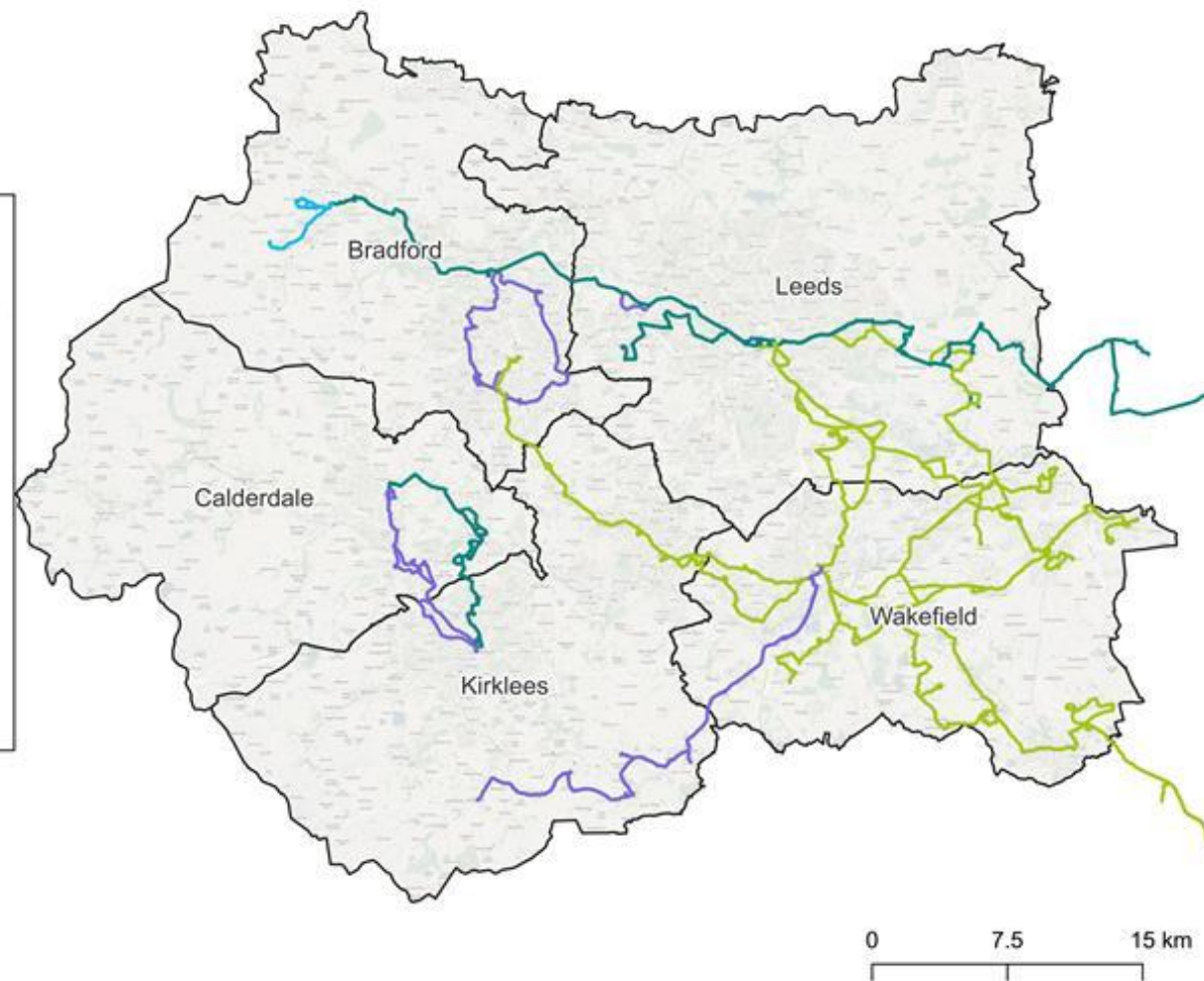
Approach

- 1 This Report is based on fieldwork conducted from 30th September to 17th December 2024
- 2 Face to face interviews conducted by PRS (the fieldwork arm of BDRC Group), with a QR code option available
- 3 Interviewers approach passengers at random on the bus to complete the survey, aiming to speak to all passengers during their journeys
- 4 1915 interviews in total conducted during the fieldwork period (872 face to face and 1,043 via QR code)
- 5 After the completion of fieldwork, the profile of passengers was examined, and it was determined that weighting was not required.
- 6 Significance testing shows sample size gives a 95% confidence interval of +/-0.98%.

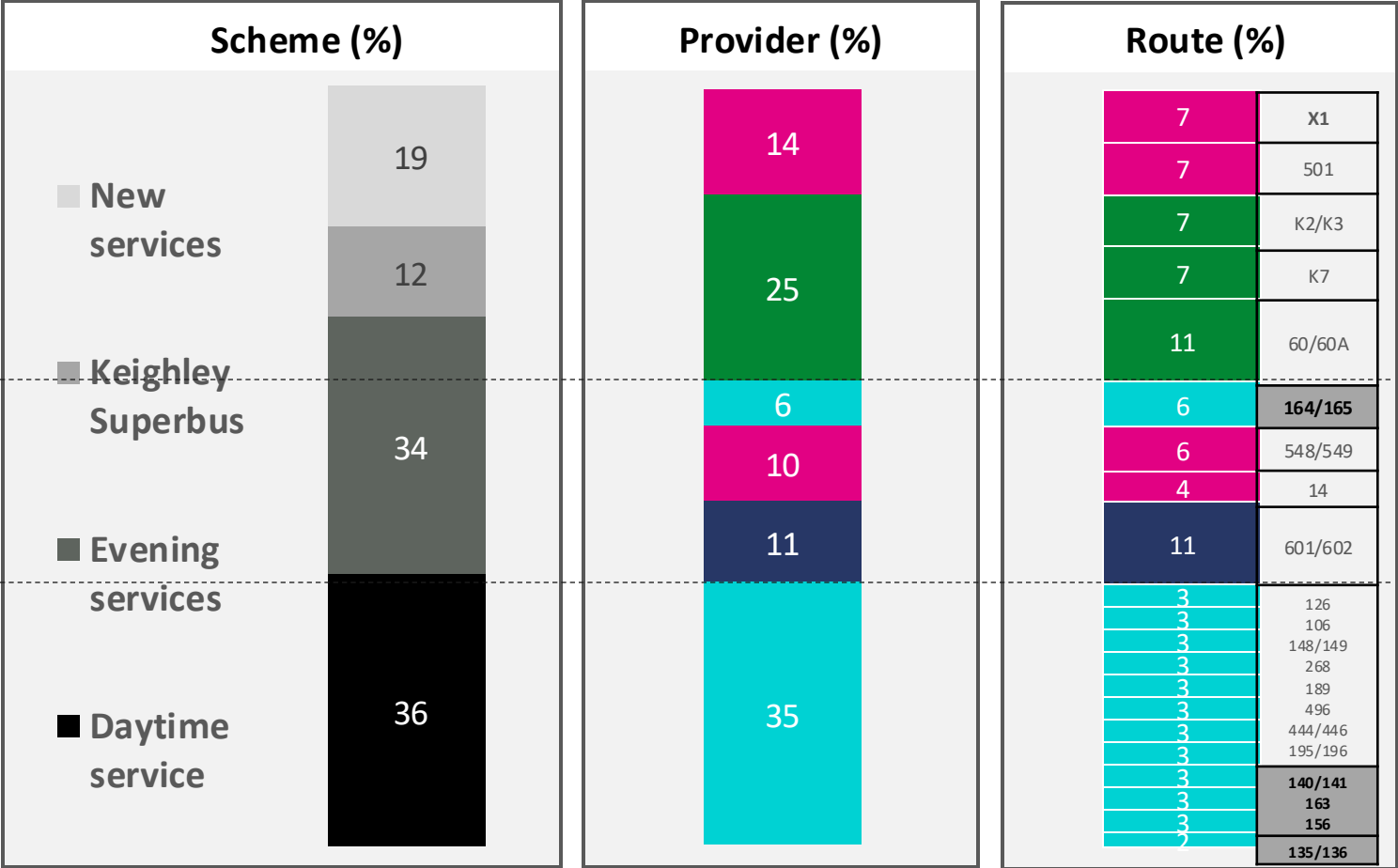
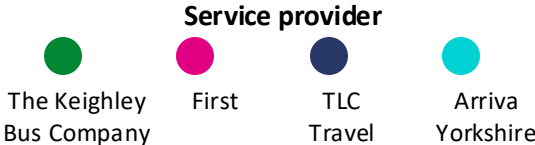
A key limitation of the methodology is the absence of a true baseline for comparison, as the 'Network Enhancements' and 'Superbus' schemes were already in place at the time of the research. Consequently, we relied on respondents' self-reported recollections of their behavior from 12 months ago, which may introduce recall bias.

Scheme Bus Services Map

Bus Network Enhancements and Superbus



Sample Summary



Target sample sizes were set for each service receiving investment to ensure an even spread across all these services, with more survey responses targeted on services with higher frequency.

Some of the enhancements were introduced more than 12 months before the survey period:

- K2/3, K7, 60/60A (3rd September 2023)
- other service uplifts were introduced in February 2024 or July 2024 (Phases 1 and 1.5)



Key findings

Key findings

Change in bus usage

- A third (34%) of passengers are now using buses more, with 15% of these having not used buses on the route surveyed on at all previously. 16% are using the bus less than 12 months ago.
- Of those using buses more, a third of these had previously travelled by car. This is 27% for those who report a change in circumstances as a reason for using bus more – suggesting the change has not impacted on car access.
- In terms of frequency of use, the main shift is moving to more people using the bus 3-5 days a week (presumably for work)
- Change in circumstances are the main reason for increased use, but 29% mention improved service reasons as a major factor, 13% mentioning improved bus times. For those mentioning a change in circumstances, for 66% these are new journeys.

Passenger perceptions

- Journey start ratings are generally reasonably positive, although a little lower for frequency and timing of buses. This is particularly the case for frequent users – who are most likely to be frustrated by this as they are likely travelling for work or education.
- Those travelling during the evening also tend to give poorer ratings – likely as bus frequency is a little lower for many routes in the evenings.
- Arriva Yorkshire (evening services) tend to be rated lower, while Keighley services tend to receive higher ratings.
- On board ratings are generally positive, particularly for ease of ticket purchase, length of journey and personal safety. Again, ratings are lower for the evening Arriva services.
- Frequency of buses – in the daytime, and in the evening, are most important to passengers.

Demographic differences

- Younger passengers (aged 16-25) and ethnic minorities are the most likely to have increased their bus usage – with 62% aged 16-34 mentioning a change in circumstances
- Older passengers are more likely to travel less frequently, and during off peak times, for leisure purposes. Their ratings are therefore more positive, presumably as punctuality is less of a concern for this group.
- Those with disabilities still rate services as accessible, and in fact rate slightly higher than those without disabilities, suggesting this does not impact their usage of buses on these routes.

Key findings

Daytime service changes

- 36% of passengers are using buses more on the routes with daytime service changes – with 17% of these making new journeys. 17% are using the bus less than 12 months ago.
- Daytime services are all rated middling (above evening services) for journey start ratings and length of journey, but a little above average for value for money.

Evening service changes

- 28% of passengers are using buses more on routes with evening service changes – with 13% of these making new journeys. 14% are using the bus less than 12 months ago.
- Evening services are rated lowest for all journey start ratings, but particularly punctuality. Evening services are also the lowest rated for length of journey and value for money, but by less of a margin.

Keighley Superbus service changes

- 29% of passengers are using buses more on Keighley Superbus services with changes, with 13% of these making new journeys. 21% are using the bus less than 12 months ago, so overall change in use is less than for other service changes.
- Keighley Superbus receives the highest ratings for journey start metrics, particularly strong on frequency during the daytime. These services also rate highest for length of journey and value for money, with 49% saying they are very satisfied with the value for money of their journey.

New services

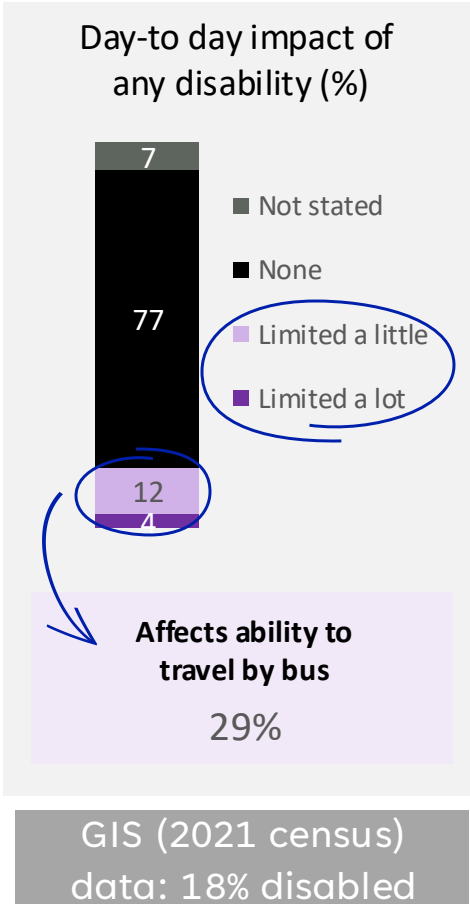
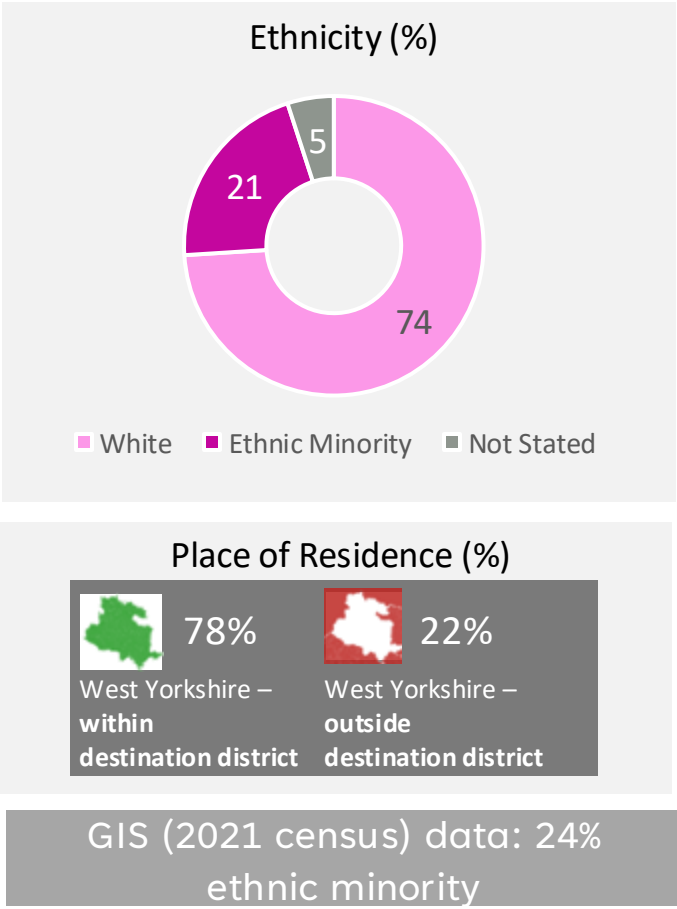
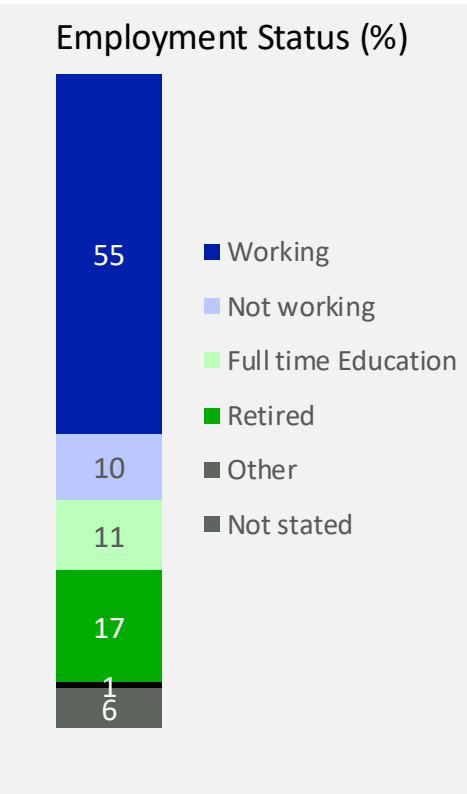
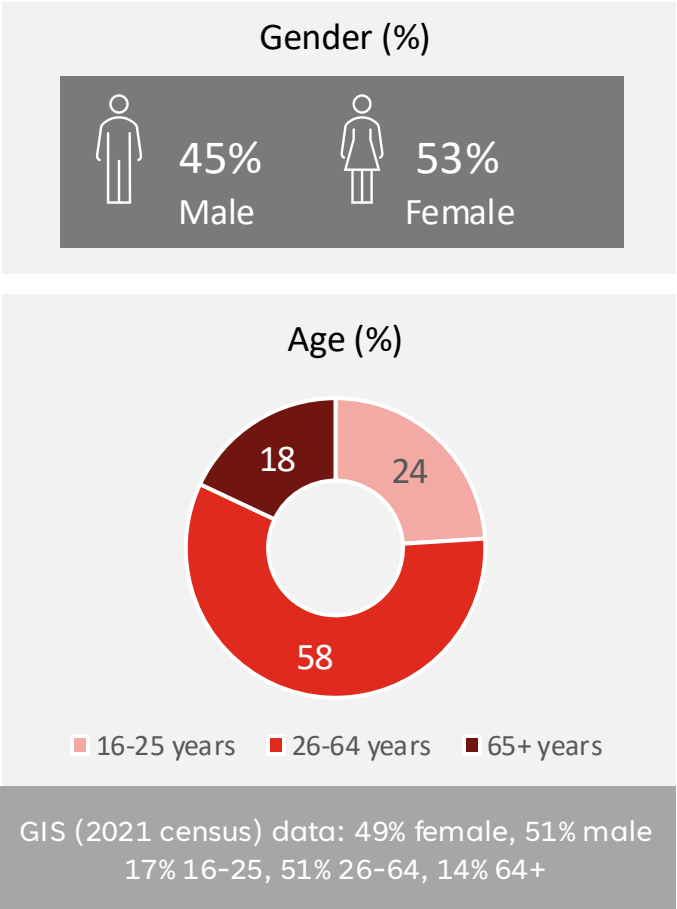
- 43% of passengers are using buses more on new services, with 19% of these making new journeys. 18% are using the bus less than 12 months ago.
- New services receive middling ratings, slightly above daytime services for journey start metrics, as well as length of journey. As with daytime services, new services are a little ahead compared to average for value for money.



Main findings – User profile

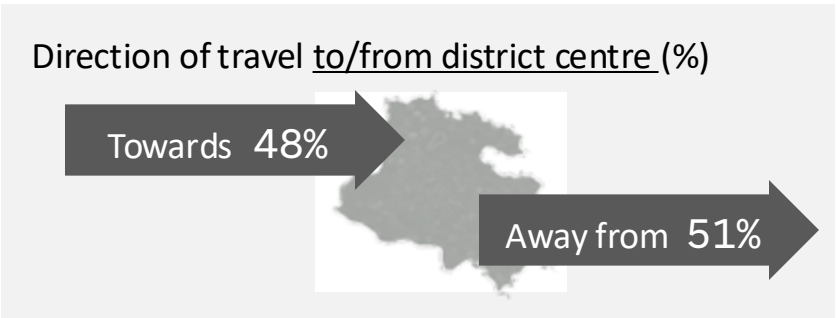
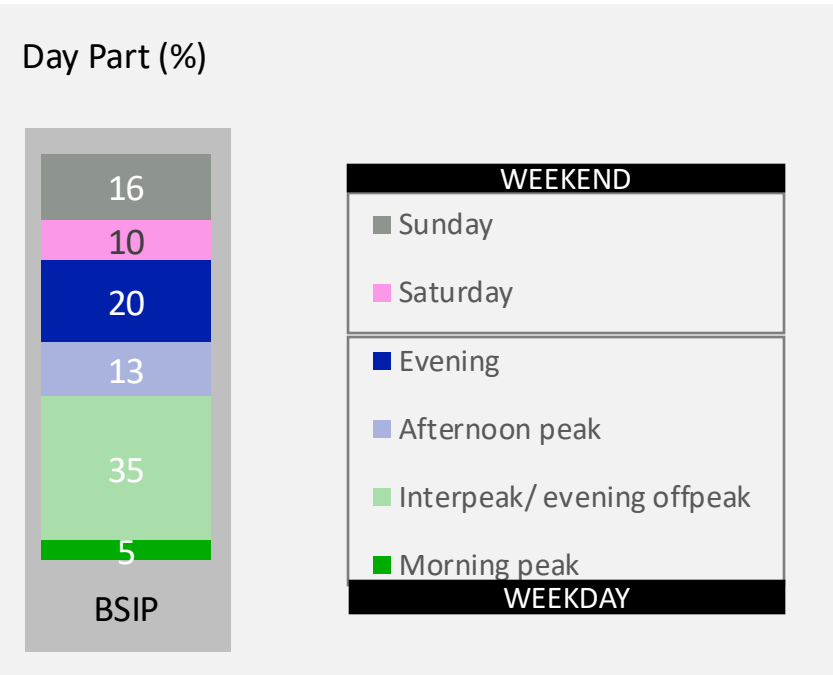
Bus passengers tended to be working, predominantly travelling within their home district and White.

User profile – summary



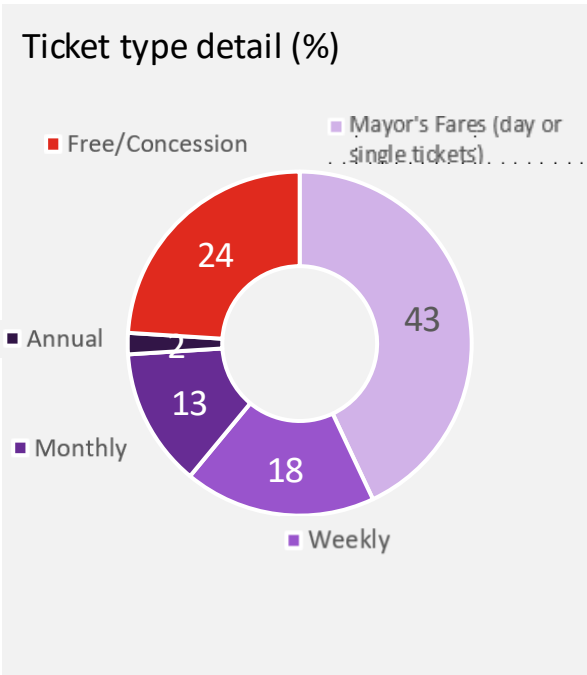
Day tickets were the most prevalent ticket type, with all areas of West Yorkshire represented.

Journey detail - summary



Place of Residence (%)

	BSIP
Wakefield	30%
Bradford	25%
Leeds	24%
Calderdale	13%
Kirklees	9%



Journey Start Time

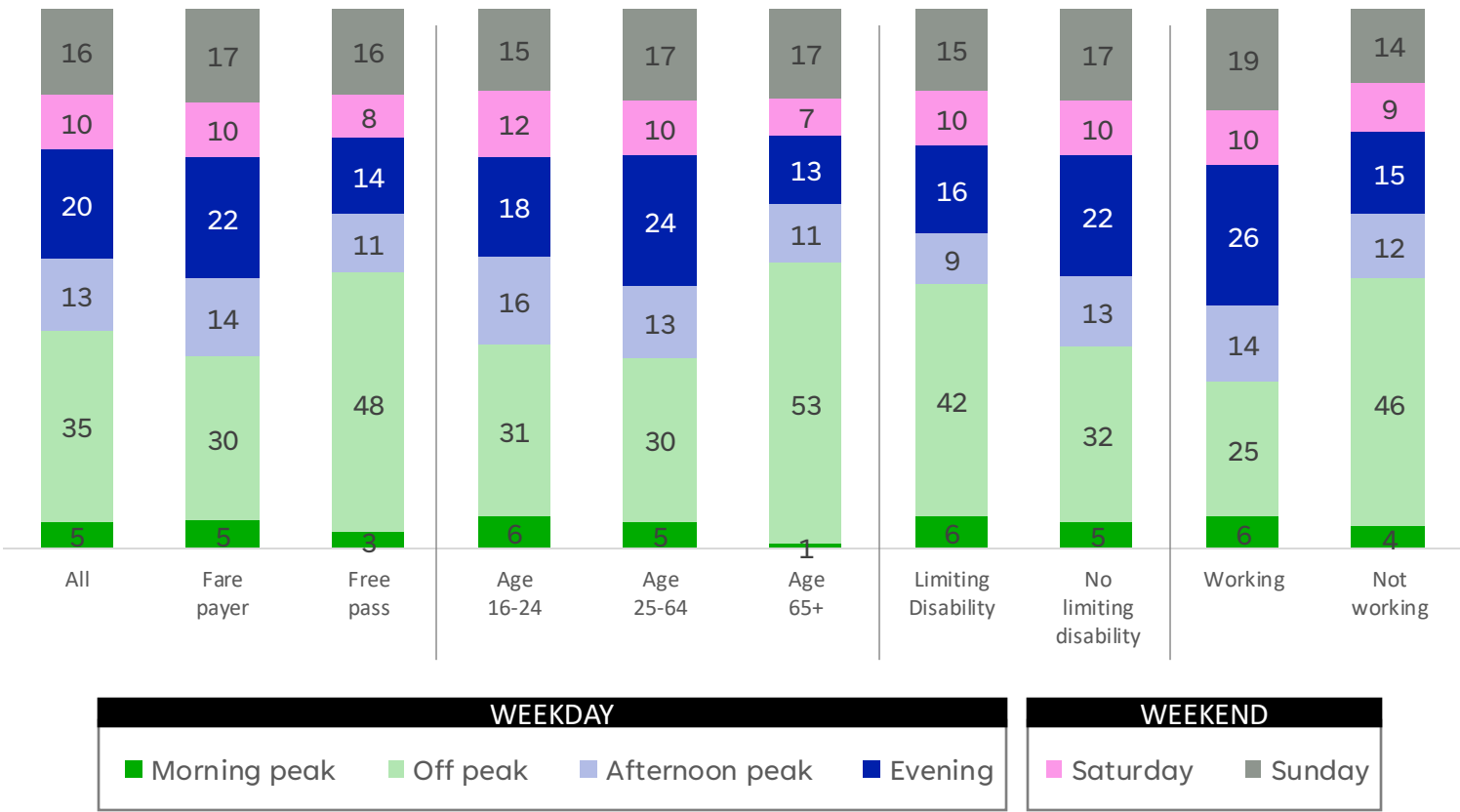
Demographic Detail (%)

Older passengers are more likely to be travelling off peak, correlating with the fact these passengers are more likely to not be working, have a free pass, and may have a limiting disability.

Passengers who are working are more likely to be travelling in the evening, and also on a Sunday.

Saturday travelling is fairly consistent by different demographics.

Daypart (%)



Q3b: On which date were you approached to complete this survey. Q4: Service Number. Q6. At roughly what time did you get on this bus?
Base: all: Fare payer: 1370 Free pass:431 Age 16-24:451 Age 25-64: 1076 Age 65+:326 Limiting disability: 306 No limiting disability: 226 Working: 1050 Not working: 738

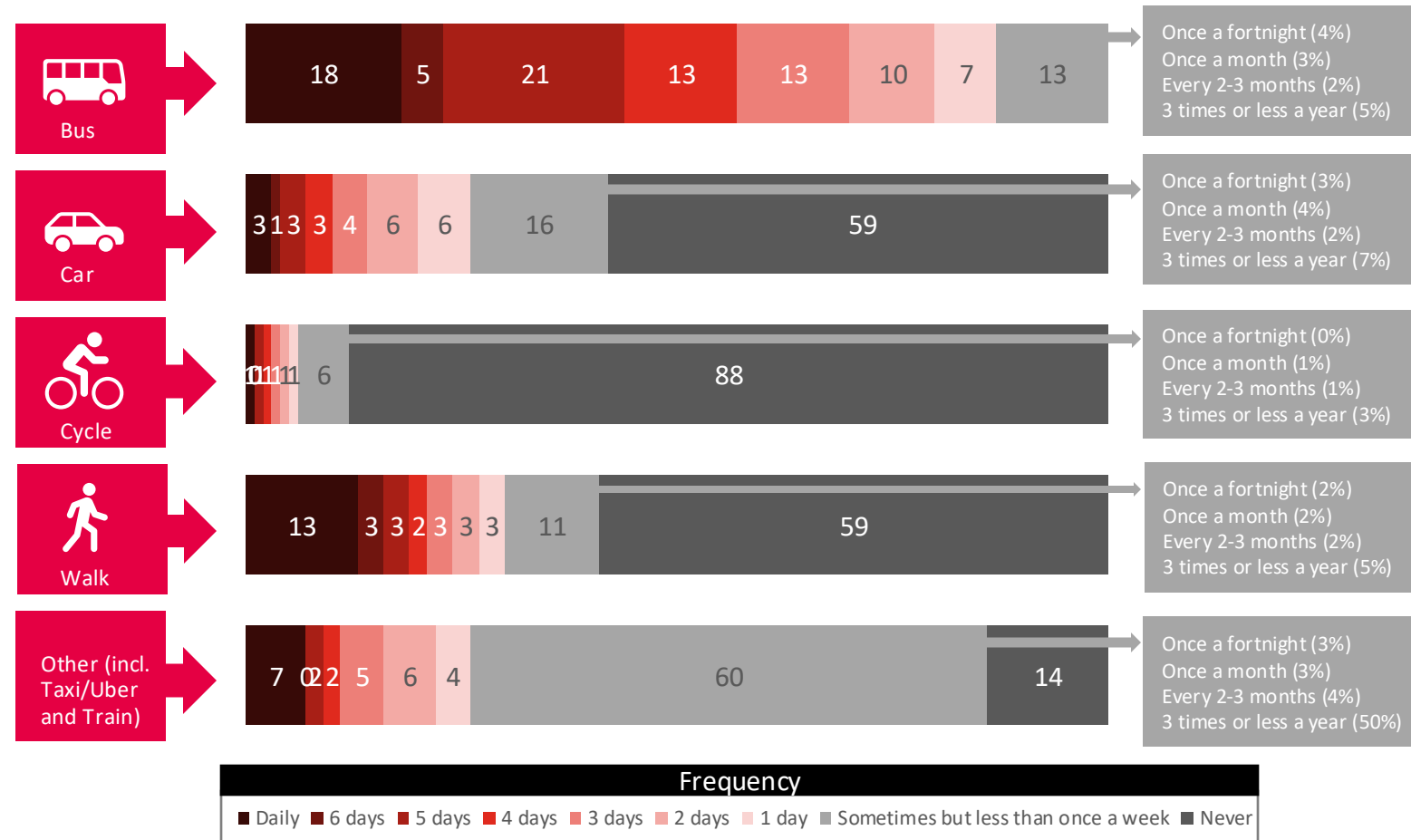
Transport mode usage on this route

By transport type (%)

The majority of passengers are regular bus users, although only 35% EXCLUSIVELY use bus. Nearly a fifth use the bus daily. The majority never use a car, and few cycle.

From GIS data: 40% of properties have no car or van

Frequency of transport mode use on this route (%)



Q8: How often do you travel on this route for each of the following forms of transport? Please tick one per type of transport
 Base: 1915 – Other accounts for 3% (n=224)



Bus usage on this route - detail

Key group comparison

Those who travel for free are more likely to be travelling less frequently (1-3 days per week).

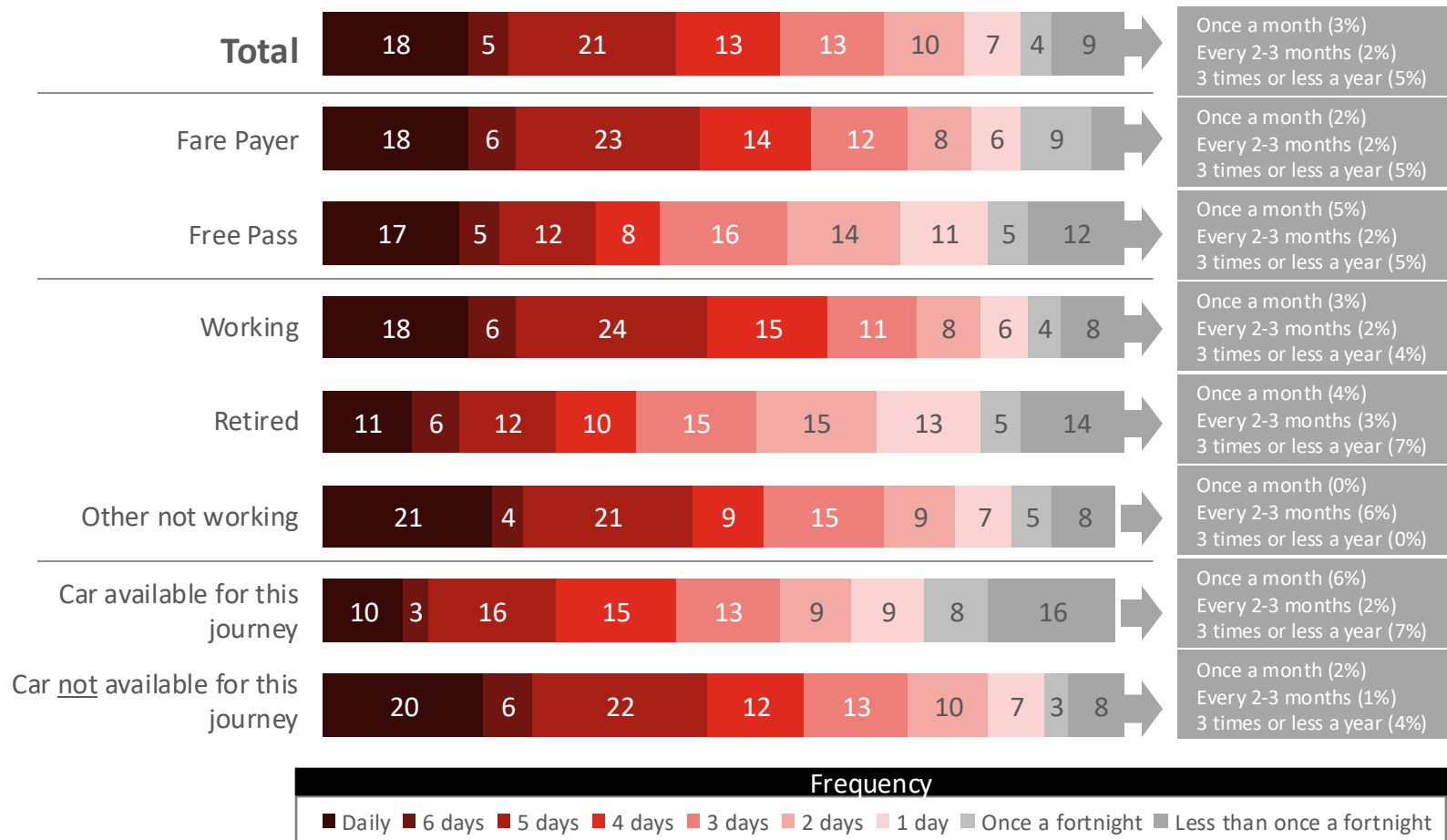
Those working are most likely to use the bus a week – presumably for commuting.

Those without access to a car also tend to travel by bus more frequently.

Even among those with access to a car, two-thirds (66%) still rely on the bus along this route more than once a week, demonstrating that many choose the bus despite having alternative transportation options.



Frequency of bus use on this route (%)



Q8: How often do you travel on this route for each of the following forms of transport? Please tick one per type of transport
 Base: 1915 Fare payer: 1379 non payer: 431 Working: 1050, Retired: 319 Not working: 401 Car available: 375 Car not available: 1540

Additional transport use for this journey

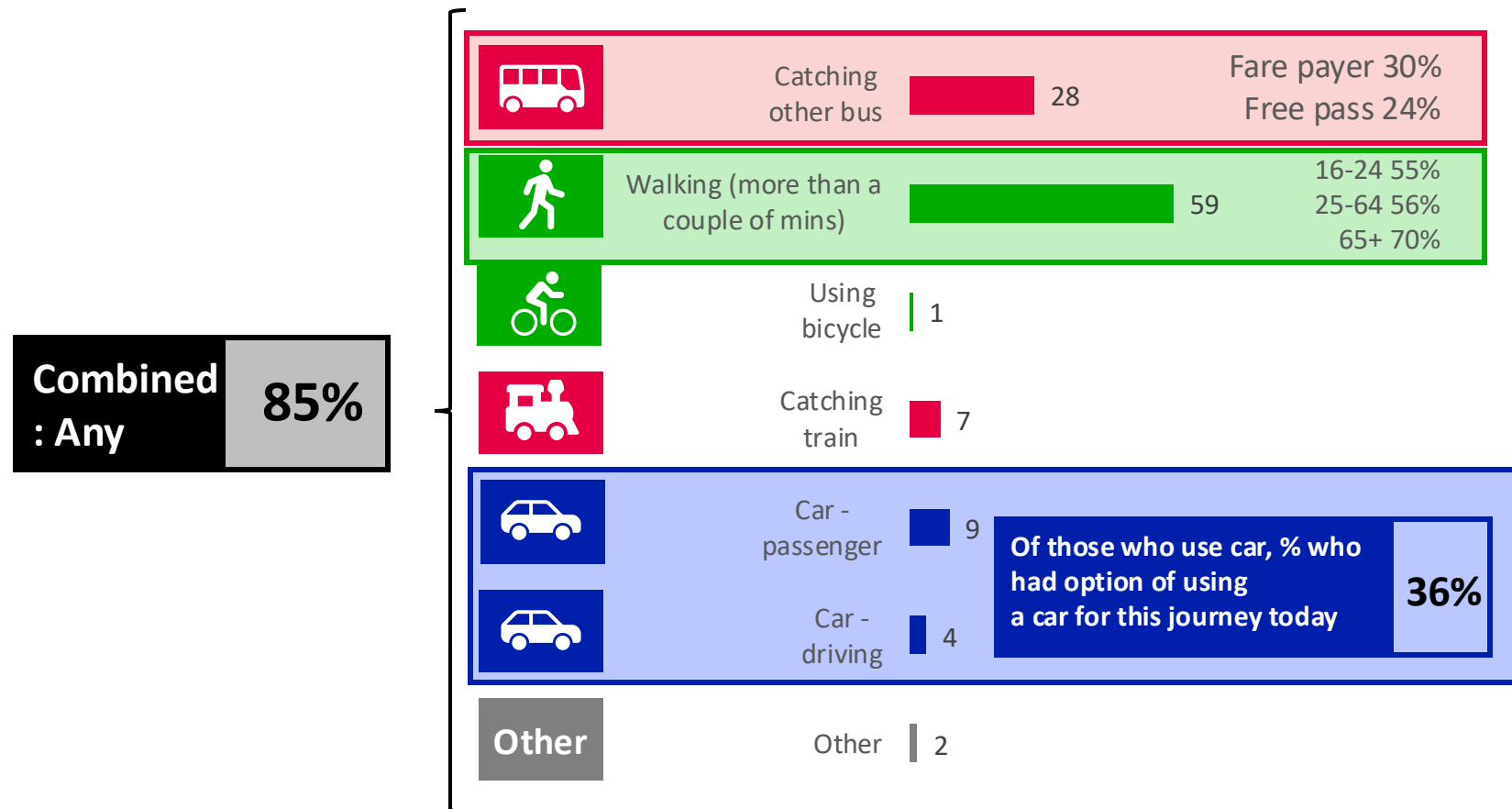
By....

Nearly three in ten caught another bus as part of their journey

The majority of passengers walked in addition to travelling by bus to complete their journey – and this is higher among older passengers.

Those who had the option of driving are more likely to have driven for some of their journey

Proportion using other modes of transport for this journey (%)



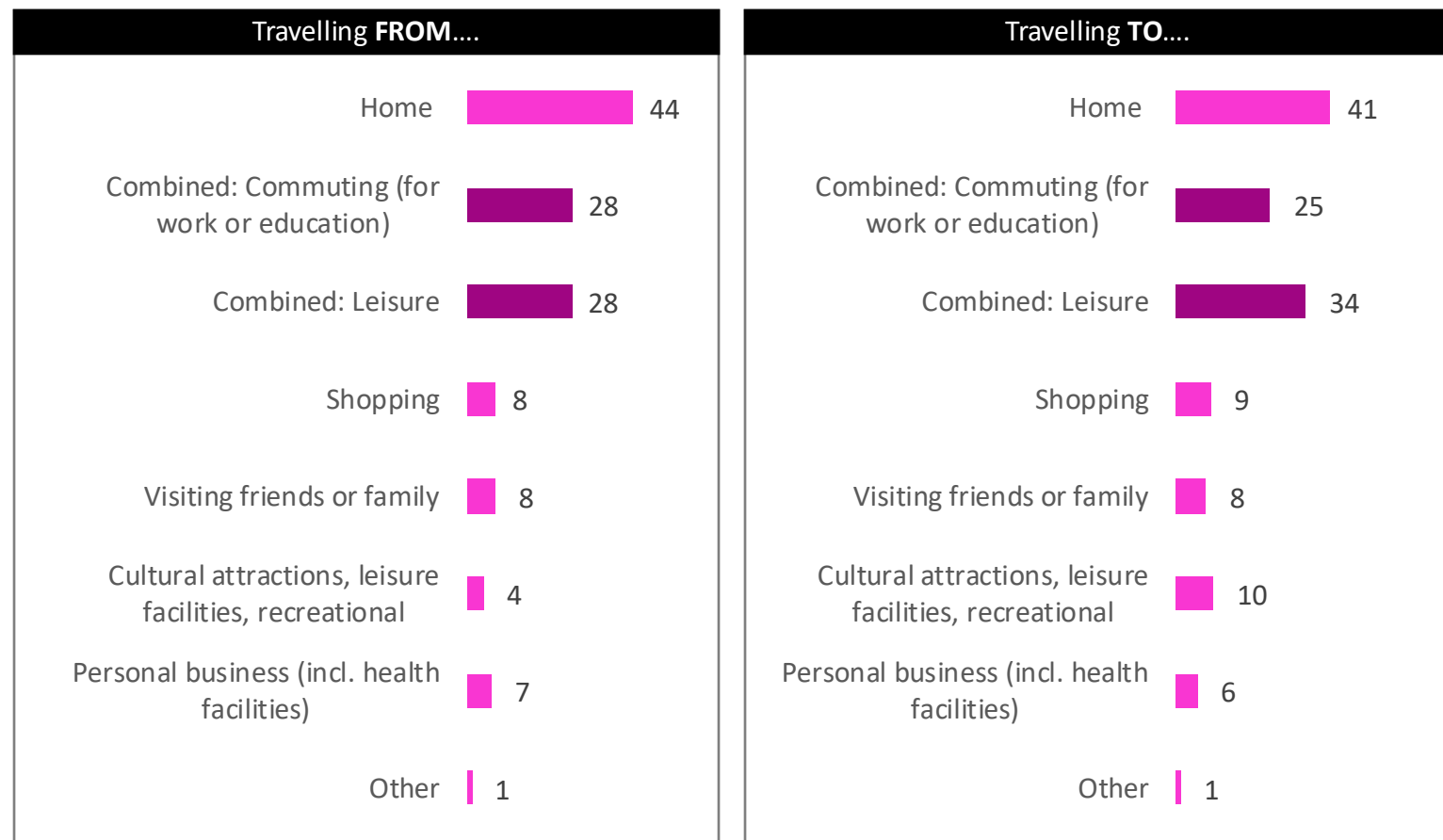
Q9: Apart from taking this bus, which of the following are you using/did you use to make this journey (select all that apply)? Base: 1915
 Q11: Did you have the option of using a car for this journey? Base: 375

Journey Purpose

Summary

Travelling to or from home is most common, with work the main other travel point.

Travelling from, Travelling to... (%)

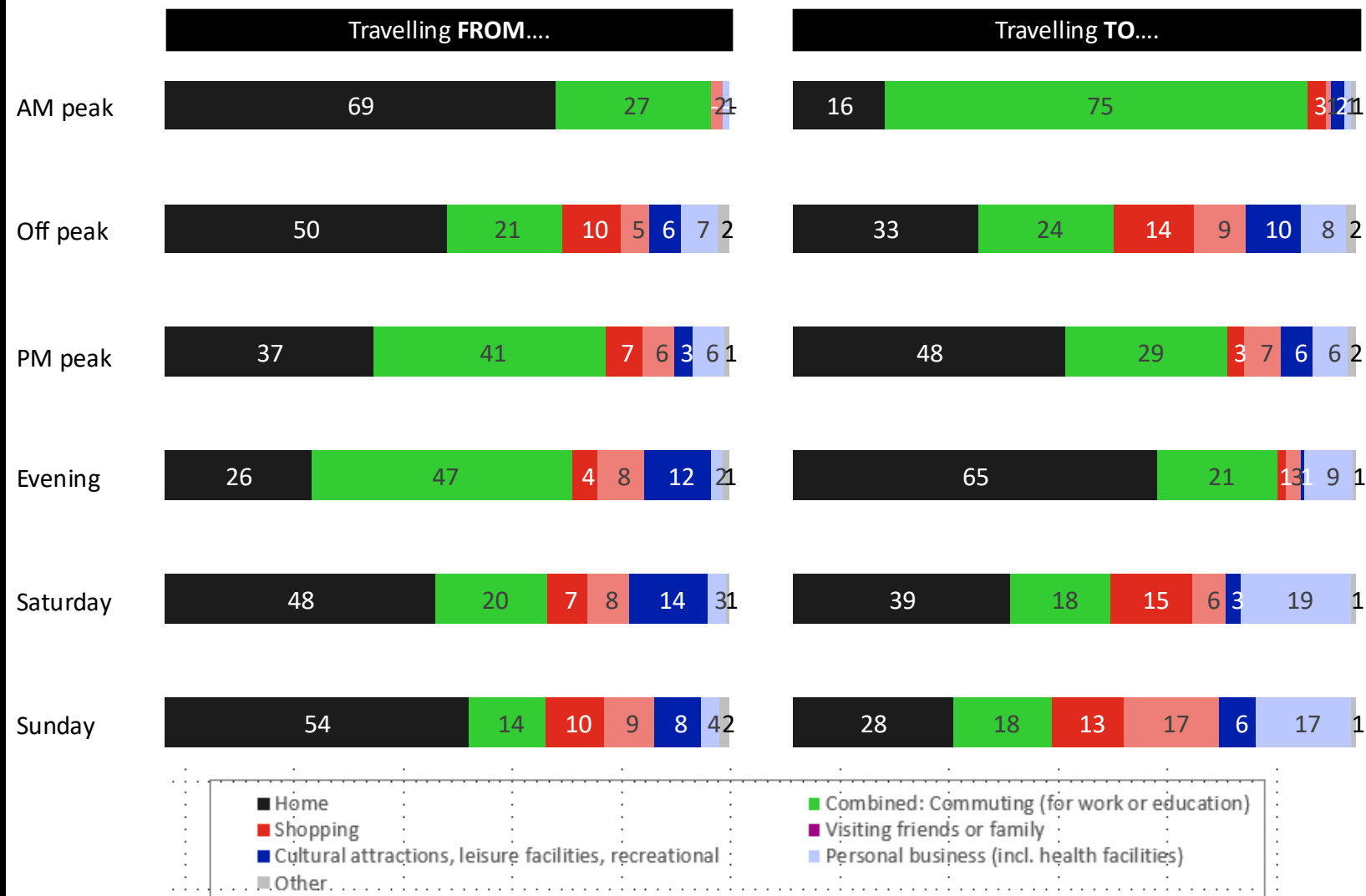


Q10: What is the **main** purpose of your current journey? Please tick the relevant boxes and select **only one** option in each column.
Base: 1915

Journey Purpose

Detail – by journey time

Commuting from home to work is most frequent in the morning, while evening journeys are primarily from work to home. On weekends, commuting remains significant, although leisure trips become more prominent. Notably, travel to work still accounts for a substantial share of afternoon peak and evening trips, reaching three in ten during PM peak.



Q10: What is the **main** purpose of your current journey? Please tick the relevant boxes and select **only one** option in each column.
 Base: Morning Peak: 91 Off peak: 667 Afternoon peak: 246 Evening: 387 Saturday: 186 Sunday: 313

Journey Purpose

Top 10 origin-destination pairs

The home-to-work commute is the most common travel pattern, with home featuring in every origin-destination pairing. People generally don't use the bus for multiple trips to various locations throughout the day, such as visiting friends, shopping, and then heading to work.

Top 10 origin-destination pairs (%) - ranked

From	To	(%)
Work	Home	15%
Home	Work	12%
Home	Shopping	7%
Work	Work	7%
Shopping	Home	6%
Home	Visiting friends/family	5%
Home	Other leisure facility	5%
Home	Home	5%
Visiting friends/ family	Home	4%
Home	Education/training	4%

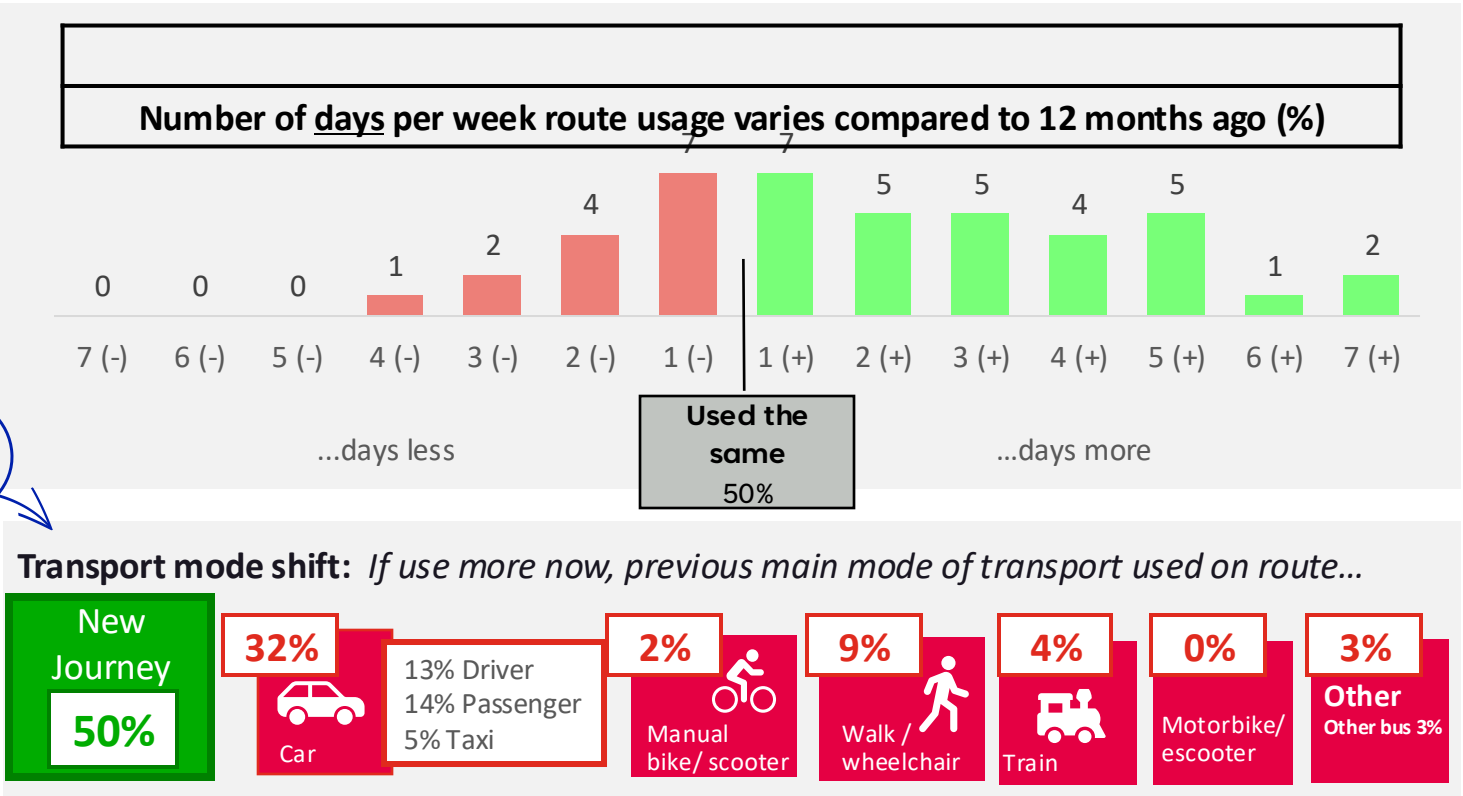
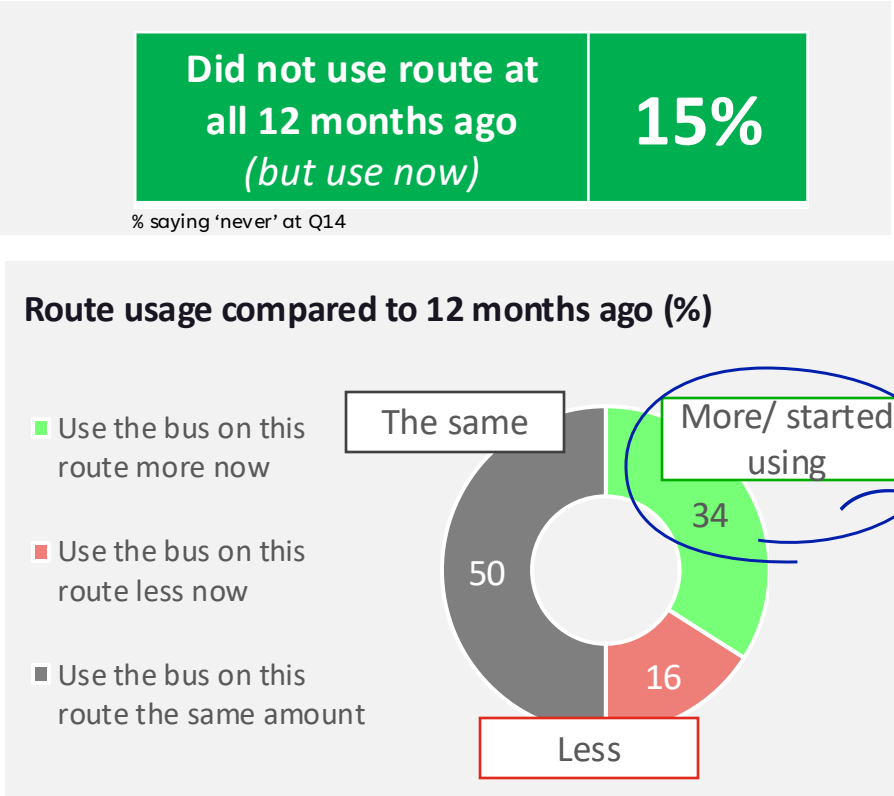
Q10: What is the **main** purpose of your current journey? Please tick the relevant boxes and select **only one** option in each column.
Base: 1915



Main findings – Change in bus usage

Just over a third are using the bus more now than 12 months ago, with 15% having not used the bus previously. In the main, bus usage replaces cars.

Route Usage - summary

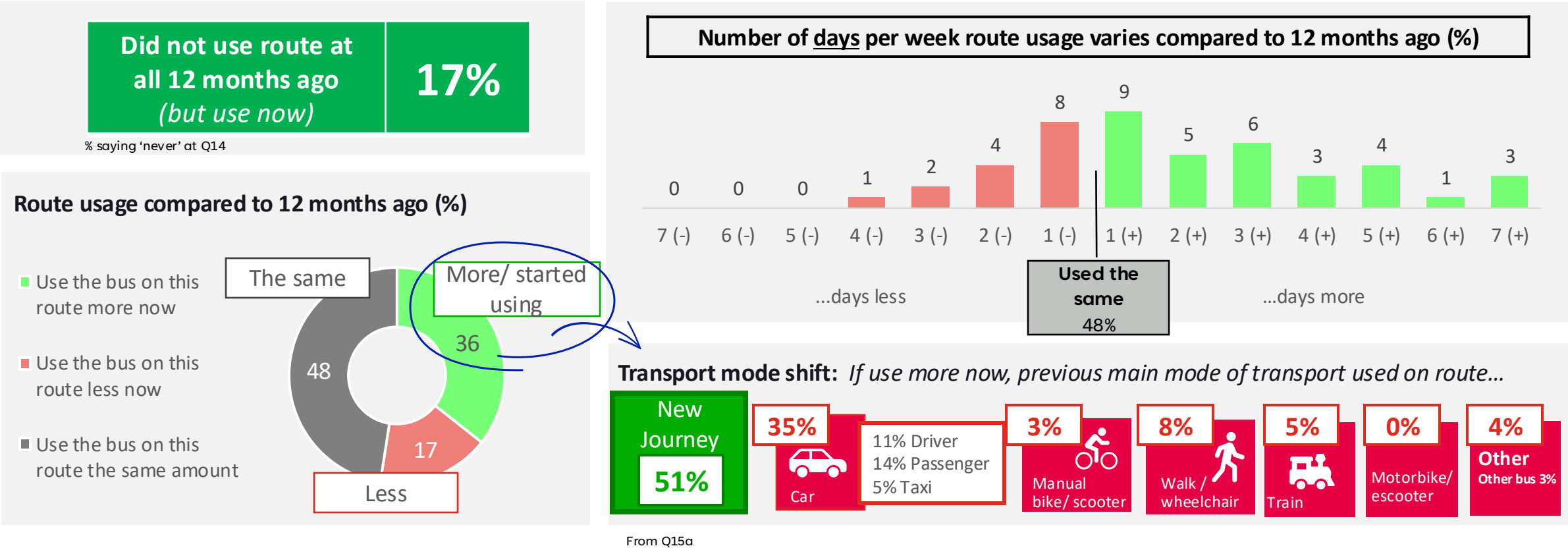


From Q15a

Base: 1915 All using bus more: 645
Q8: How often do you travel on this route for each of the following forms of transport?
Q14: 12 months ago, how often did you use the bus on this route?
Q15a: If you have started using the bus on this route or used it more frequently now than 12 months ago, what was the main mode of transport you used for journeys along this route?

For those travelling on daytime services, 17% are travelling on this route when they did not previously use a bus – with this replacing the car for 35%

Route Usage – DAYTIME SERVICES



Base: 684 All using bus more: 213
Q8: How often do you travel on this route for each of the following forms of transport?
Q14: 12 months ago, how often did you use the bus on this route?
Q15a: If you have started using the bus on this route or used it more frequently now than 12 months ago, what was the main mode of transport you used for journeys along this route?

On evening services, more are using buses the same amount – but 28% are using buses more, and again in the main, this replaces car usage.

Route Usage –EVENING SERVICES

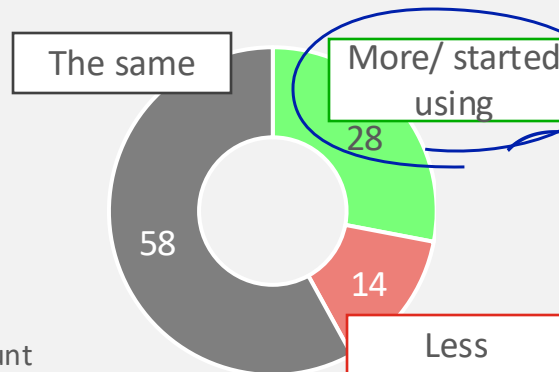
Did not use route at all 12 months ago
(but use now)

13%

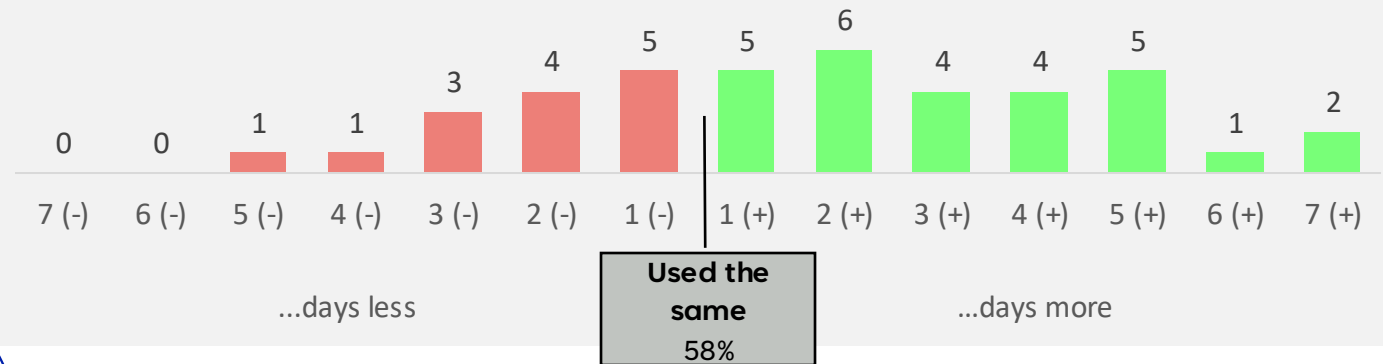
% saying 'never' at Q14

Route usage compared to 12 months ago (%)

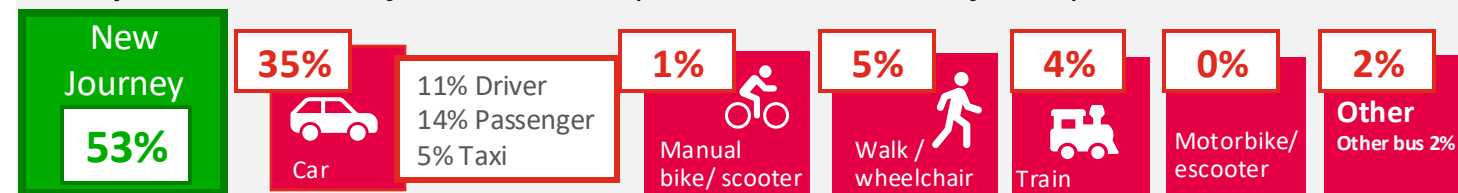
- Use the bus on this route more now
- Use the bus on this route less now
- Use the bus on this route the same amount



Number of days per week route usage varies compared to 12 months ago (%)



Transport mode shift: If use more now, previous main mode of transport used on route...



From Q15a

Base: 647 All using bus more: 298

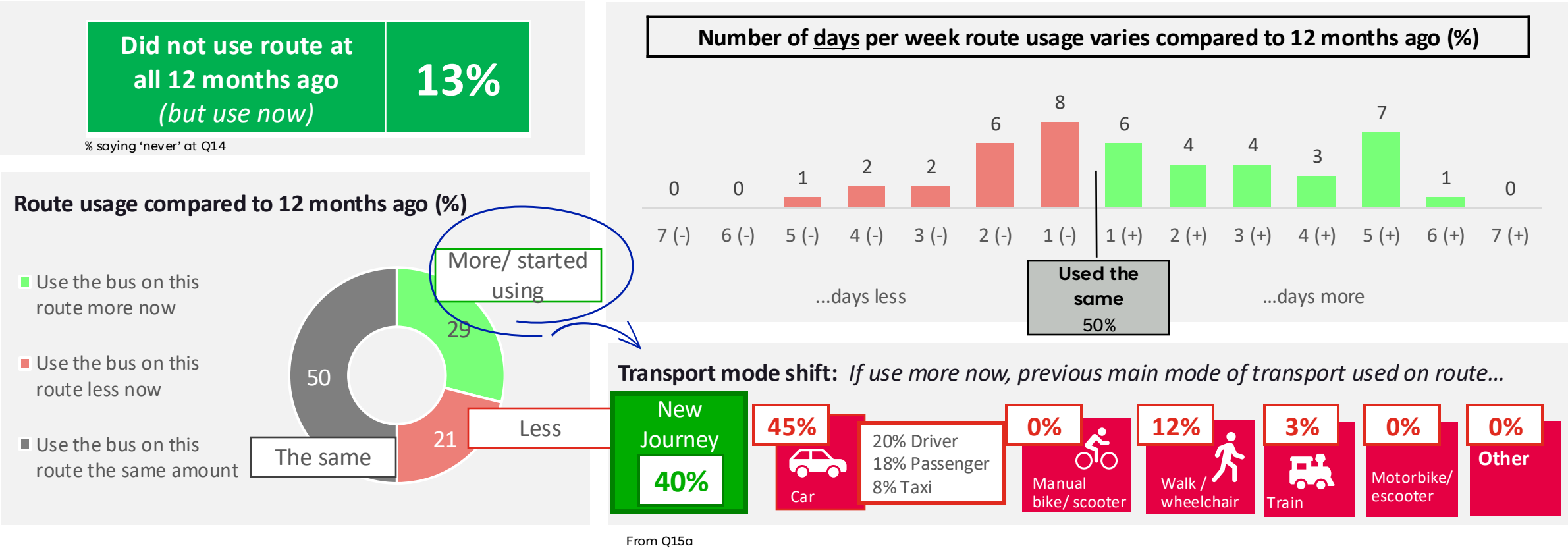
Q8: How often do you travel on this route for each of the following forms of transport?

Q14: 12 months ago, how often did you use the bus on this route?

Q15a: If you have started using the bus on this route or used it more frequently now than 12 months ago, what was the main mode of transport you used for journeys along this route?

Three in ten (29%) are using Keighley Superbus routes more, with this replacing car usage for 45%, as well as walking for 12%.

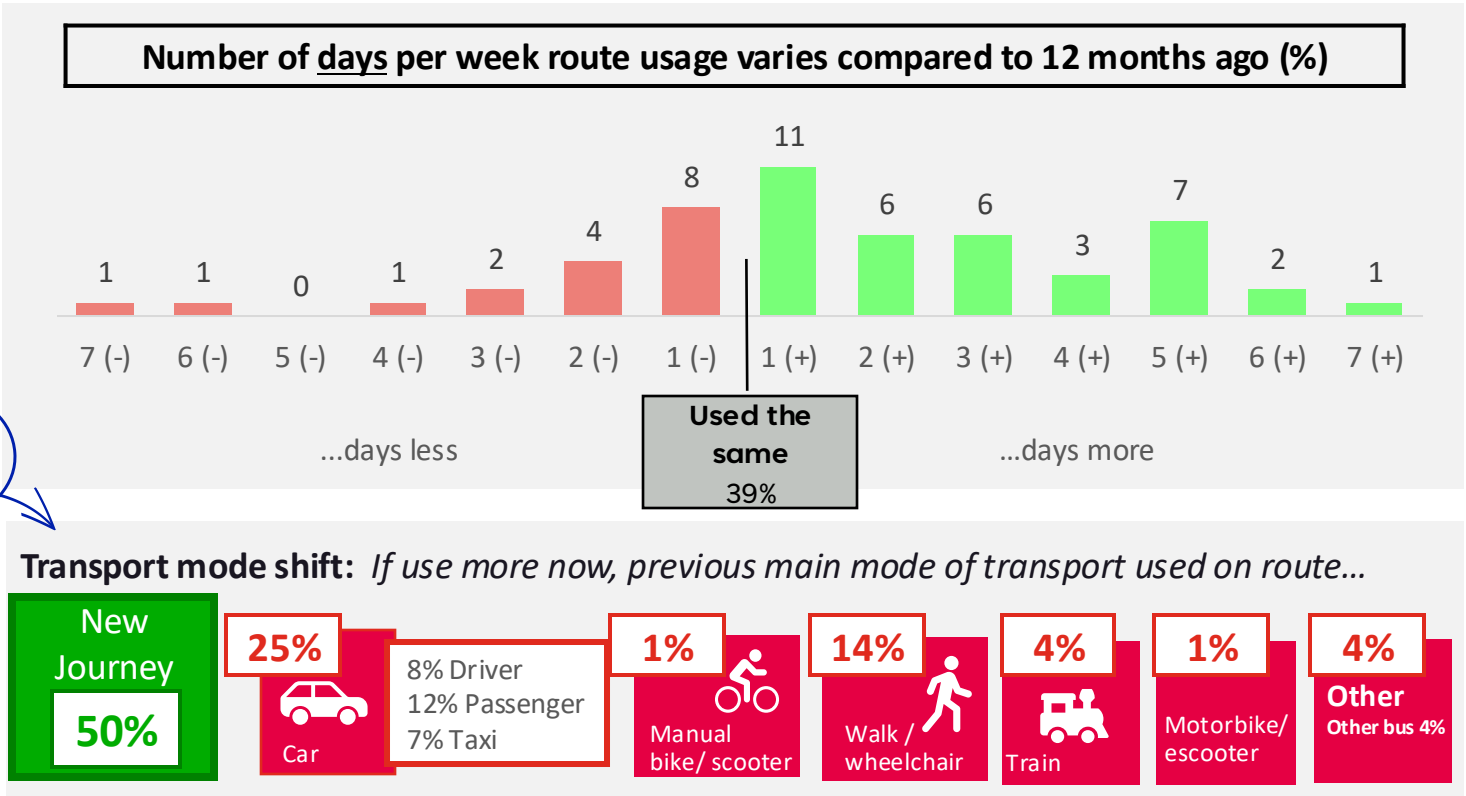
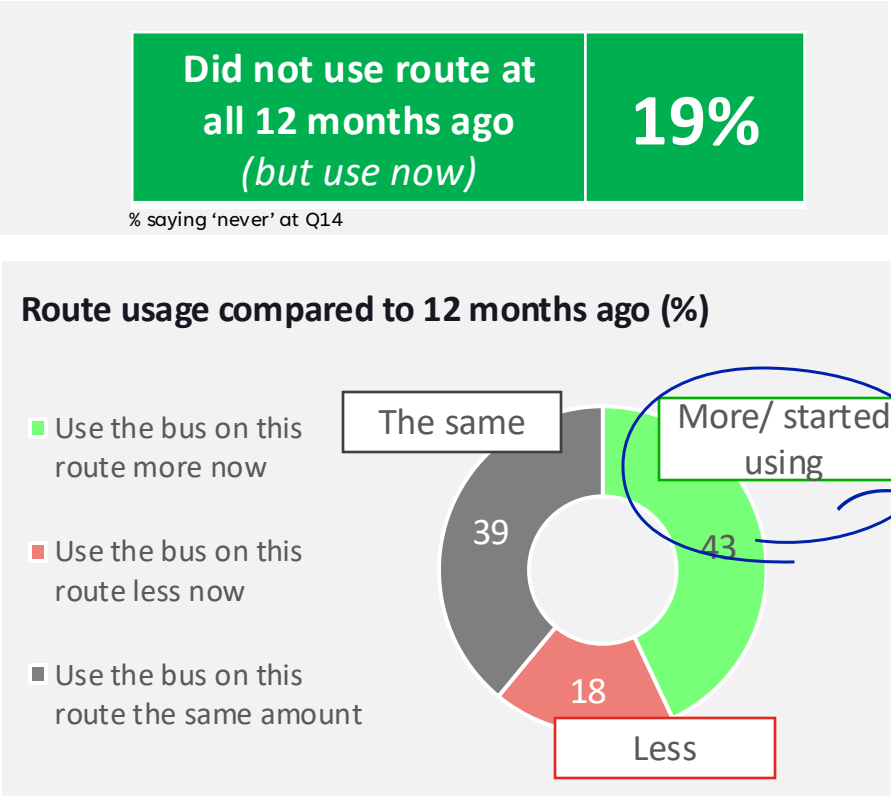
Route Usage – KEIGHLEY SUPERBUS



Base: 227 All using bus more: 41 NOTE LOW BASE
Q8: How often do you travel on this route for each of the following forms of transport?
Q14: 12 months ago, how often did you use the bus on this route?
Q15a: If you have started using the bus on this route or used it more frequently now than 12 months ago, what was the main mode of transport you used for journeys along this route?

The new services are the most likely to trigger more usage, with 43% using buses more now – although this replaces car usage less than other services.

Route Usage – NEW SERVICES



From Q15a

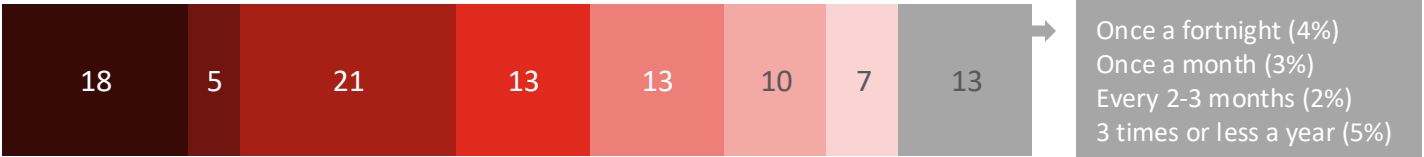
Base: 357 All using bus more: 97
Q8: How often do you travel on this route for each of the following forms of transport?
Q14: 12 months ago, how often did you use the bus on this route?
Q15a: If you have started using the bus on this route or used it more frequently now than 12 months ago, what was the main mode of transport you used for journeys along this route?

Route use comparison -detail

The proportion using the bus daily remains consistent compared to 12 months ago – with the main increase in those using the bus 3-5 days per week.

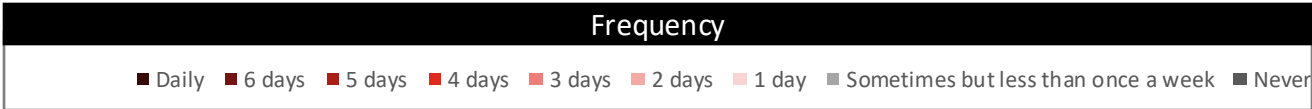
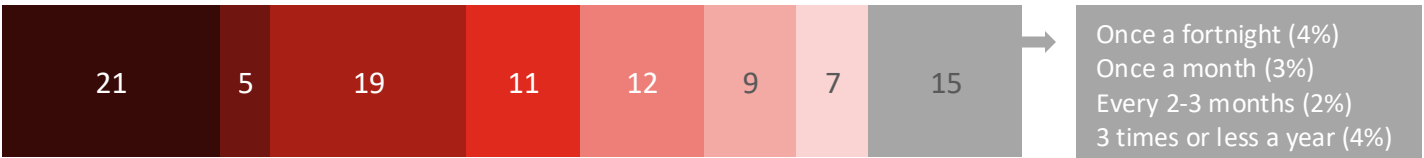
Route usage comparison (%)

Usage level (of route): **Current**



Usage level (of route): **12-months ago from current passengers**

15% never travelled by bus

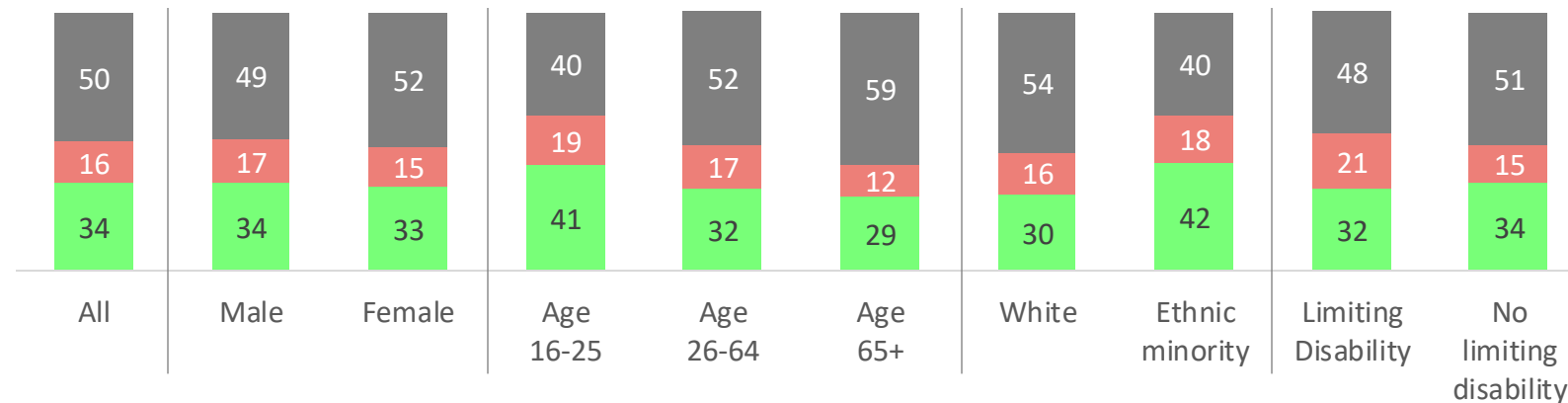


Route use comparison -detail

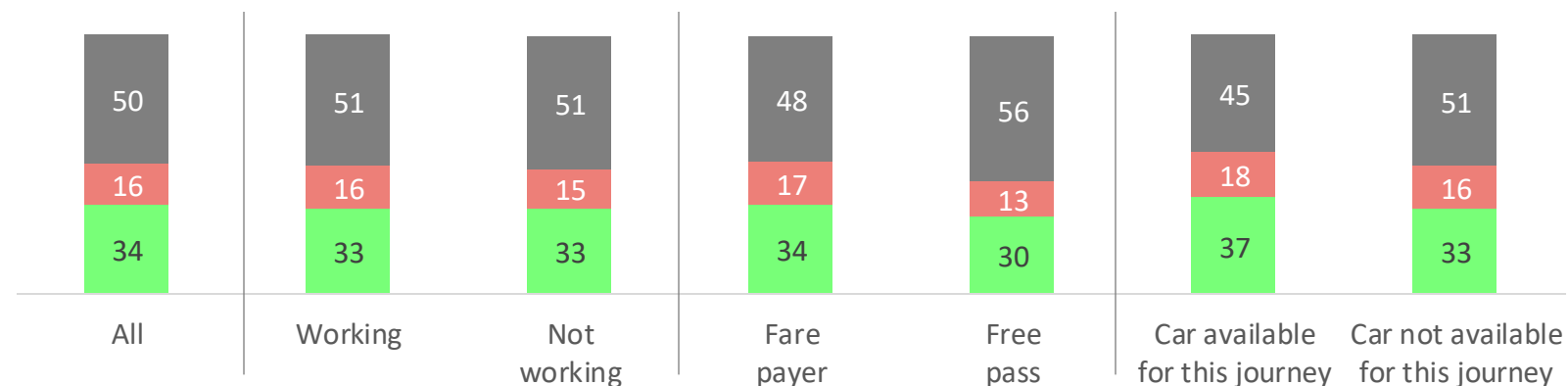
Changes in route usage over the past 12 months reveal that decreases in bus usage are relatively consistent across all demographic groups.

On the other hand, certain groups, such as younger passengers, ethnic minorities, fare-paying workers, and to a lesser extent, individuals with access to a car, are more likely to increase their bus usage.

Route usage compared to 12 months ago (%)



■ Use the bus on this route more now
 ■ Use the bus on this route less now
 ■ Use the bus on this route the same amount



Q8: How often do you travel on this route for each of the following forms of transport? Please tick one per type of transport

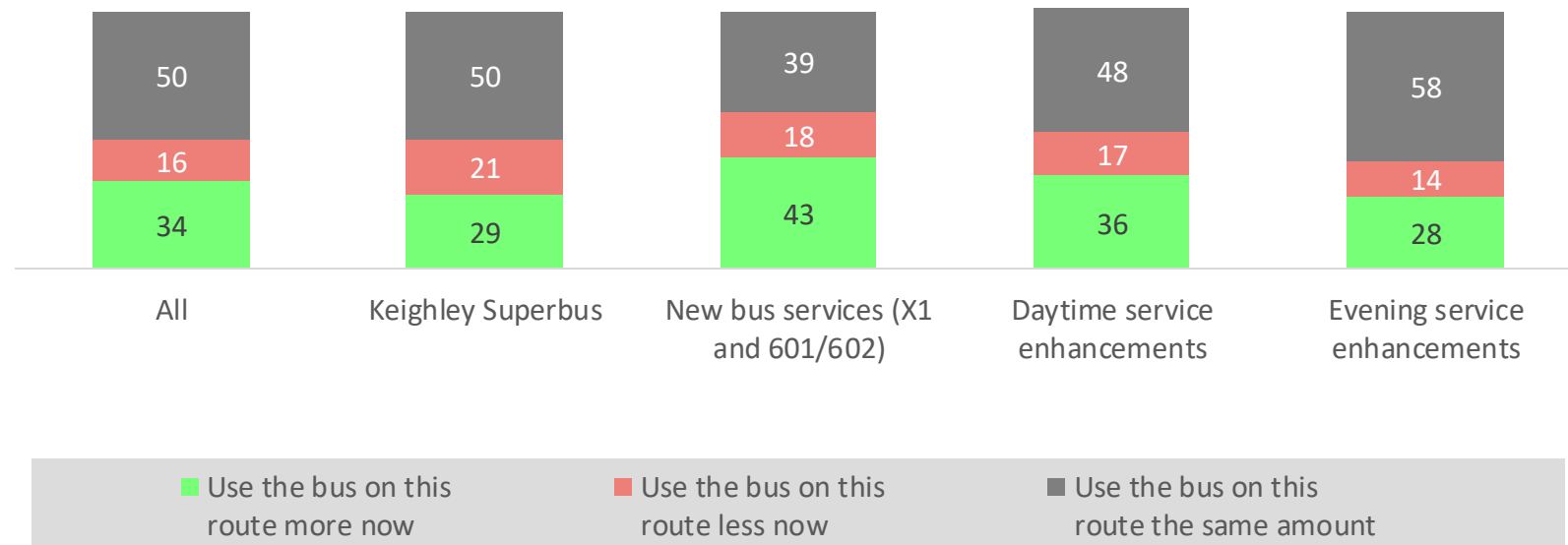
Q14: 12 months ago, how often did you use the bus on this route? Base: Female: 970 Male: 823 White: 1411 BME: 393 Limiting disability: 306 No limiting disability: 1455

White: 1441 BME: 393 Working: 1050 Not working: 738 Fare payer: 1370 Free pass: 431 Car available: 375 no car: 1540

Route use comparison -detail

Additional new bus services have had the biggest impact on bus usage. Daytime services have also resulted in more bus use for over a third of users, while change in use due to Keighley Superbus and evening services has been more muted, with around three in ten using these services more.

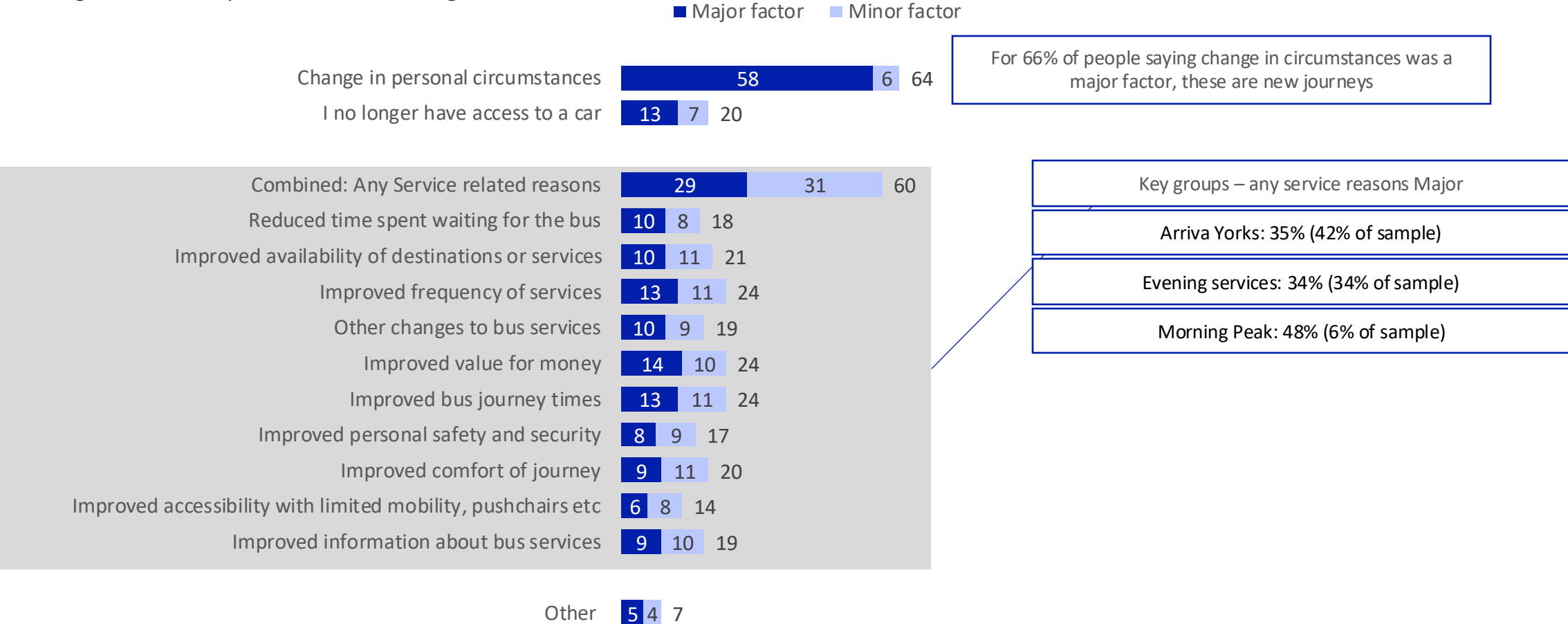
Route usage compared to 12 months ago (%)



Motivations for increased route use compared to 12 months ago

Reasons for more frequent route use compared to 12 months ago (%)

Among those who reported increased usage



Q15b: If you have started using the bus on this route or use it more frequently now than 12 months ago, why is this?
Base: if reported increased frequency of bus use in Q8 vs Q14 161

The primary reason for increased route usage is changes in personal circumstances. Better value for money and improved service frequency follow, particularly among those aged 26 and older.

Motivations for increased route use compared to 12 months ago

Among those who reported increased usage

MAJOR FACTOR	All	Age			Route use 12 months ago...	
		16-25	26-64	65+	...did not use route at all	...used route but I use it more now
Combined: Any Service related reasons	29%	30%	30%	26%	24%	30%
Improved value for money	14%	12%	17%	7%	12%	14%
Improved frequency of services	13%	10%	15%	15%	8%	13%
Improved bus journey times	13%	12%	15%	10%	12%	14%
Improved availability of destinations or services	10%	8%	12%	11%	7%	11%
Reduced time spent waiting for the bus	10%	10%	11%	7%	7%	8%
Improved comfort of journey	9%	8%	11%	5%	9%	10%
Improved information about bus services	9%	6%	11%	6%	6%	9%
Improved personal safety and security	8%	4%	11%	5%	7%	8%
Improved accessibility with limited mobility, pushchairs etc	6%	4%	7%	3%	4%	6%
<i>Other changes to bus services</i>	10%	9%	11%	9%	7%	8%
Change in personal circumstances	58%	62%	60%	40%	69%	58%
I no longer have access to a car	13%	6%	16%	16%	14%	14%
<i>Other</i>	5%	3%	5%	8%	9%	3%

Q15b: If you have started using the bus on this route or use it more frequently now than 12 months ago, why is this?
Base: if reported increased frequency of bus use in Q8 vs Q14 161

Reasons for reduced route use compared to 12 months ago

Reasons for less frequent route use compared to 12 months ago (%)

Among those who reported reduced usage

■ Major factor ■ Minor factor

Change in personal circumstances	26	11	37
I now have improved access to a car	11	9	20

Combined: Any Service related reasons	32	34	66
I have to wait longer for a bus	20	12	32
Fewer destinations or services	14	7	21
Reduced frequency of services	20	11	31
Other changes to bus services	13	13	26
Reduced value for money	13	10	24
Longer bus journey times	12	10	22
Personal safety and security concerns	8	8	16
Reduced comfort of journey	9	9	17
Concerns with accessibility around limited mobility, pushchairs or luggage.	7	7	14
Difficulty accessing information about bus services	9	7	16
Other	19	2	21

- Key groups – any service reasons Major
- Evening services 34% (34% of sample)
- Arriva Yorks: 50% (42% of sample)
- Evening peak: 52% (23% of sample)

Q15 c: If you use the bus less frequently now than 12 months ago, why is this?
Base: If reported reduced frequency of bus use in Q8 vs Q14 122



Main findings – key ratings

Frequent users were less positive about journey start ratings – in particular frequency of buses and punctuality (more likely to be travelling for work/education)

Journey Start Experience ratings – detail (1) (Route usage)

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

Frequent User	Not frequent User
Use bus route at least once a week	Use bus route less than once a week

	Frequent User			Not frequent User		
	All frequent users	Weekday	Weekend	All not frequent users	Weekday	Weekend
Its punctuality at the stop you caught the bus	0.7	0.6	0.8	1.3	1.2	1.4
The frequency of buses in the daytime	0.5	0.4	0.5	0.9	0.9	0.8
The frequency of buses in the evening	-0.1	-0.1	-0.1	0.3	0.3	0.3
The timing of the first and last bus of the day	0.2	0.2	0.2	0.6	0.5	0.6
Availability of destinations or services	0.6	0.6	0.7	0.9	1.0	0.7

Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
Base: All frequent 1215 (weekday, 920, weekend 295) All not frequent 126 (weekday, 74, weekend 52).

Evening passengers are least satisfied overall, particularly with punctuality, frequency and timings of first and last buses.

Journey Start Experience average ratings – detail (2) DAY PART

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

	All	Time of Day				
		Peak	Off Peak	Evening	Saturday	Sunday
Its punctuality at the stop you caught the bus	0.7	0.6	1.0	0.1	0.8	1.0
The frequency of buses in the daytime	0.5	0.4	0.8	0.0	0.5	0.6
The frequency of buses in the evening	-0.1	-0.1	0.2	-0.4	-0.2	0.0
The timing of the first and last bus of the day	0.3	0.3	0.5	-0.1	0.3	0.3
Availability of destinations or services	0.6	0.6	0.9	0.2	0.6	0.7

Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
Base: Morning Peak: 73 Off peak: 422 Afternoon peak: 185 Evening: 293 Saturday: 127 Sunday: 220

Older passengers tend to give better ratings, linked to being less likely to be travelling in the evening. There are no big differences by gender or disability status.

Journey Start Experience average ratings – detail (3) DEMOGRAPHICS

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

		Demographics						
		All	16-24	25-64	65+	Male	Female	Limited a little/lot
Its punctuality at the stop you caught the bus	0.7	0.6	0.7	1.0	0.7	0.8	0.9	0.7
The frequency of buses in the daytime	0.5	0.4	0.4	1.0	0.5	0.5	0.7	0.5
The frequency of buses in the evening	-0.1	-0.1	-0.1	0.2	0.0	-0.1	0.0	-0.1
The timing of the first and last bus of the day	0.3	0.3	0.2	0.5	0.2	0.3	0.3	0.3
Availability of destinations or services	0.6	0.7	0.5	0.8	0.6	0.6	0.7	0.6

Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
Base: 16-24: 378 25-64: 808 65+: 126 Male:589 Female:672 Limited a little/lot: 205 No limitations: 1037

The frequency of buses in the evening has a consistently low rating on each day of the week. Mondays, Fridays, and Sundays journey start experience ratings are on average higher than other days of the week.

Journey Start Experience average ratings – detail (4) DAY OF THE WEEK

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

	WEEKDAYS							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	NET
Its punctuality at the stop you caught the bus	0.8	0.7	0.4	0.6	0.6	0.6	0.9	0.7
The frequency of buses in the daytime	0.6	0.3	0.3	0.5	0.6	0.3	0.5	0.5
The frequency of buses in the evening	0.1	-0.2	-0.3	0.0	0.1	-0.3	0.0	-0.1
The timing of the first and last bus of the day	0.4	0.2	0.1	0.3	0.3	0.1	0.2	0.2
Availability of destinations or services	0.8	0.7	0.4	0.6	0.6	0.6	0.9	0.7

Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
Base: Monday: 191 Tuesday: 211 Wednesday: 138 Thursday:222 Friday:182 Saturday:87 Sunday:184

Journey Start Experience average ratings – ranked (by route)

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

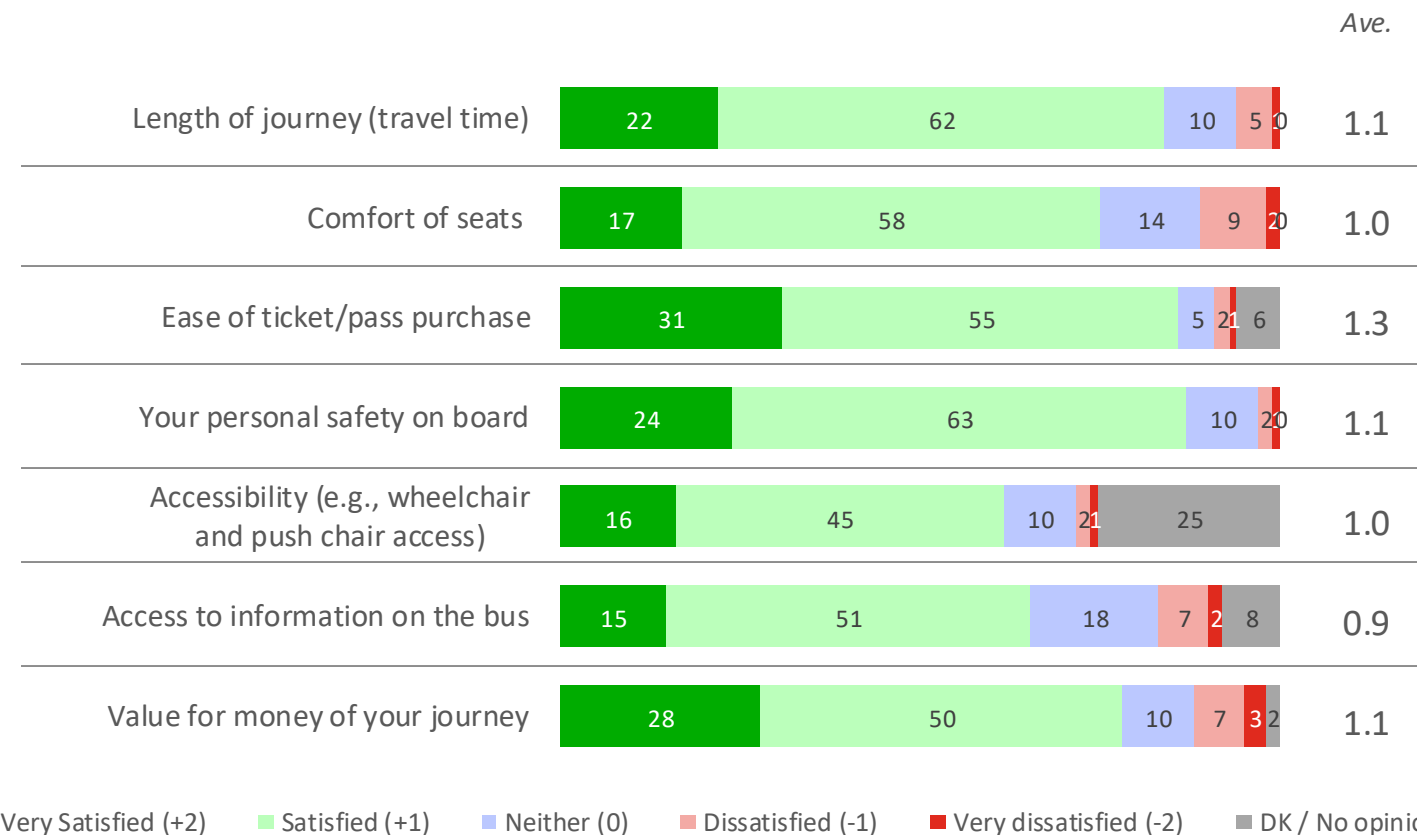
LOWEST		HIGHEST	
Its punctuality at the stop you caught the bus/stop		TOTAL AVE: 0.7	
0.1	1.0	1.1	1.2
Evening services	Daytime service	New services	Keighley Superbus
The frequency of buses in the daytime		TOTAL AVE: 0.5	
0	0.6	0.8	1.3
Evening services	Daytime service	New services	Keighley Superbus
The frequency of buses in the evening		TOTAL AVE: -0.1	
-0.5	0.1	0.3	0.3
Evening services	Daytime service	New services	Keighley Superbus
The timing of the first and last bus of the day		TOTAL AVE: 0.6	
-0.1	0.4	0.6	0.7
Evening services	Daytime service	New services	Keighley Superbus
Availability of destinations or services		TOTAL AVE: 0.6	
0.2	0.8	0.9	1.1
Evening services	Daytime service	New services	Keighley Superbus

On board bus- ratings

Journey aspects on board bus

Ratings are highest for ease of ticket purchase and personal safety, with lower ratings for access to information and comfort of seats

Experience ratings – on board the bus (%)



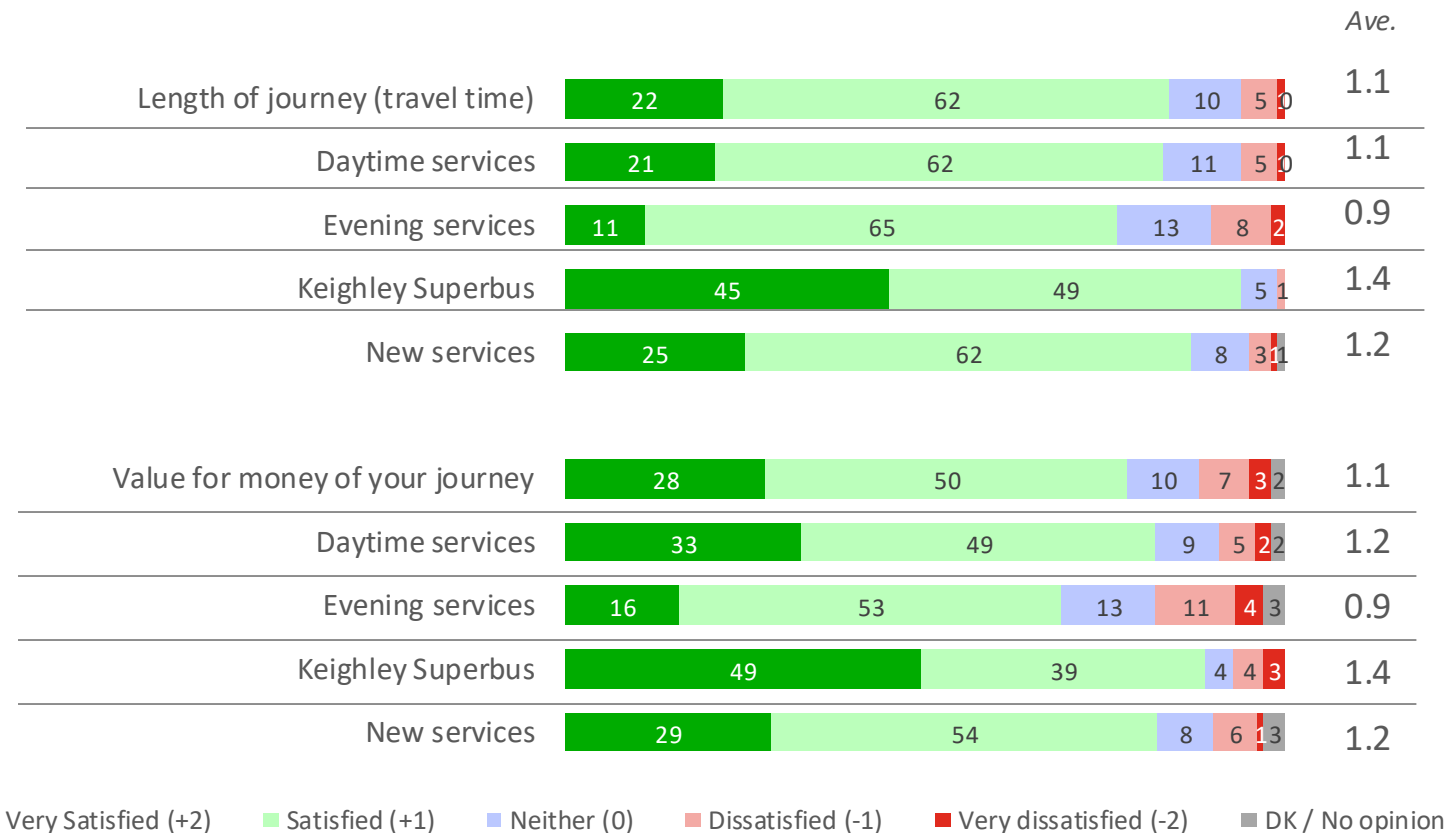
Q13: The following are parts of your journey when you're **on the bus**. Please rate on the scale how satisfied you were.
Base: 1,915

On board bus- ratings

Journey aspects on board bus

Ratings are highest for ease of ticket purchase and personal safety, with lower ratings for access to information and comfort of seats

Experience ratings – on board the bus (%)



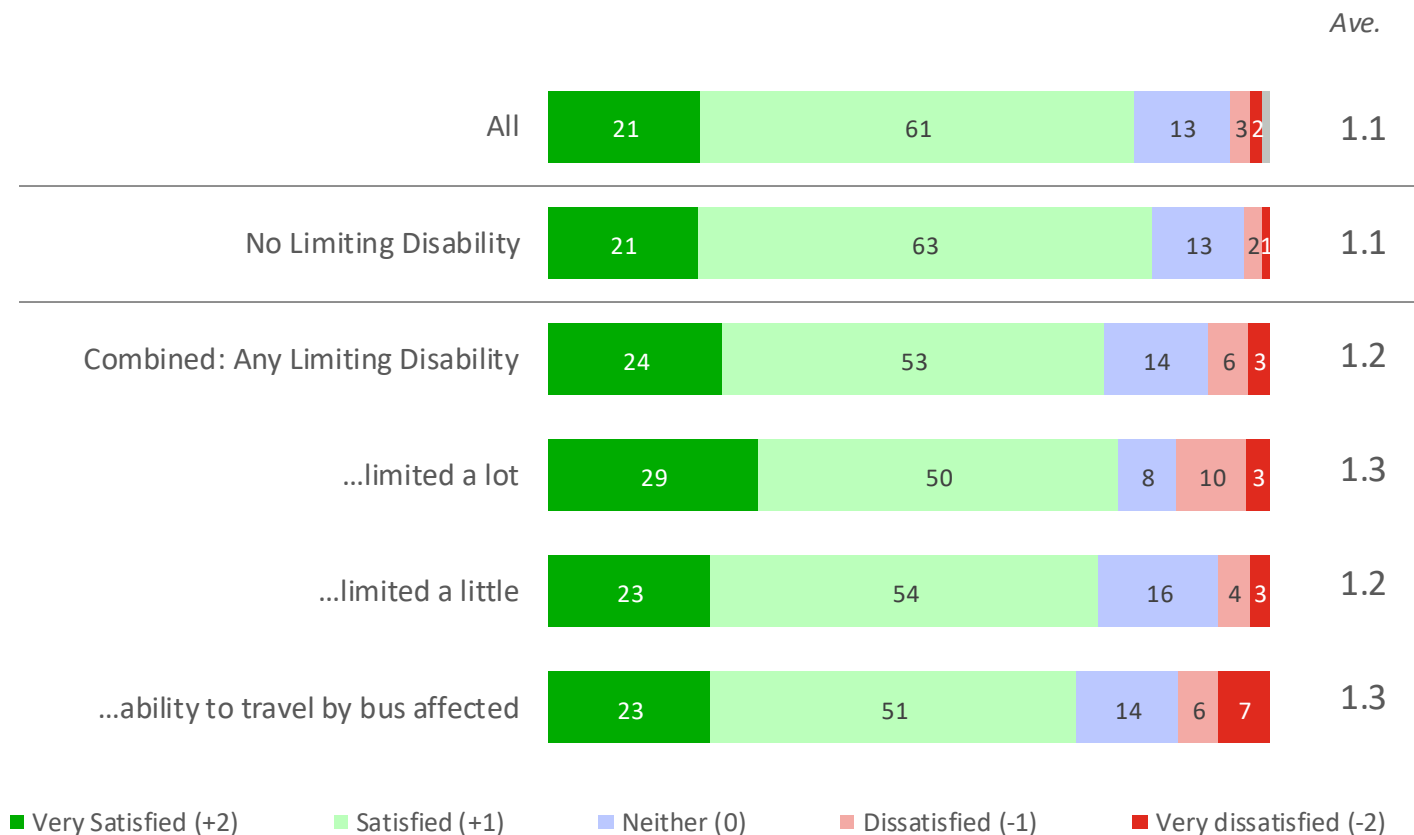
Q13: The following are parts of your journey when you're **on the bus**. Please rate on the scale how satisfied you were.
Base: 1,915

Accessibility Focus

By Key Subgroups

Those with more limited accessibility actually rate their satisfaction with the accessibility of their journey higher than those with less issues – a result of them being able to travel on this journey

Satisfaction ratings for accessibility*



Q13: The following are parts of your journey when you're **on the bus**. Please rate on the scale how satisfied you were.

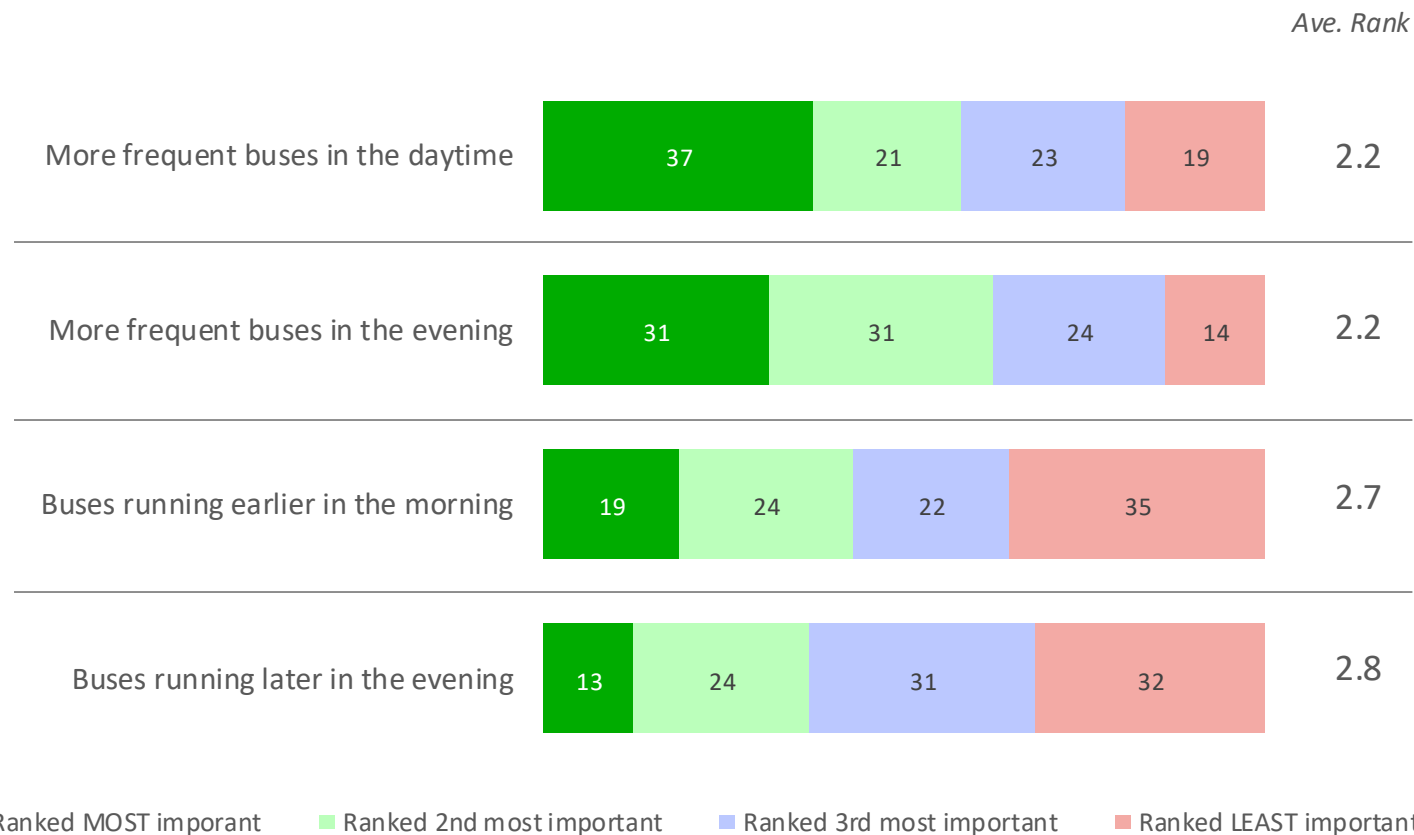
Base: All: 1915 Limiting disability: 306 Limited a lot: 80 Limited a little: 226 affects ability to travel: 88

*DK answers were removed to read the results on those who are concerned /have an opinion on accessibility

Importance of service factors

Most respondents consider it more crucial to have more frequent buses during both daytime and evening hours.

Service factors – ranked by importance



Q15d: Which is more important to you on this route? Please rank from 1-4.
Base: 1915

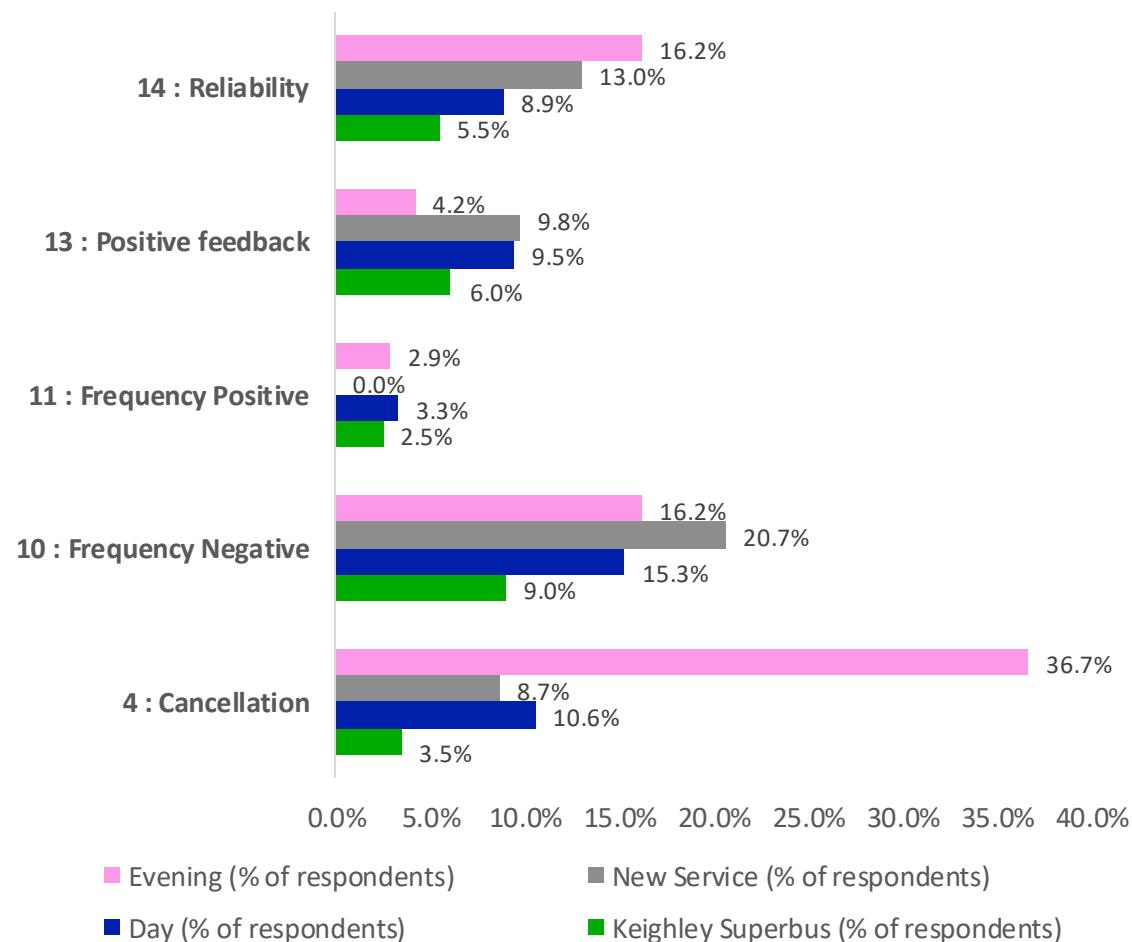
The following refers to 'free text' feedback from passengers asking about their views of any changes to bus services

Qualitative Analysis

- Cancellations, poor reliability, and service frequency were the most common topics of complaints. 39 respondents said frequency enhancements were little use if services are cancelled.
- 36.7% of respondents complained about levels of cancellations on evening services, vs only 10.6% of respondents with daytime enhancements and only 3.5% on the Keighley Superbus.
- 11.16% more passengers overall gave negative comments on frequency of services than positive. Keighley Superbus passengers were much less likely to provide negative comments on frequency.

30594/BSIP Bus Network Enhancements and Superbus
Report/v1/12.11.24/confidential

Responses by service enhancement type



Q16: Is there anything else you want to feed back about the recent changes to bus services on this route, such as the frequency improvements?. Base: 958

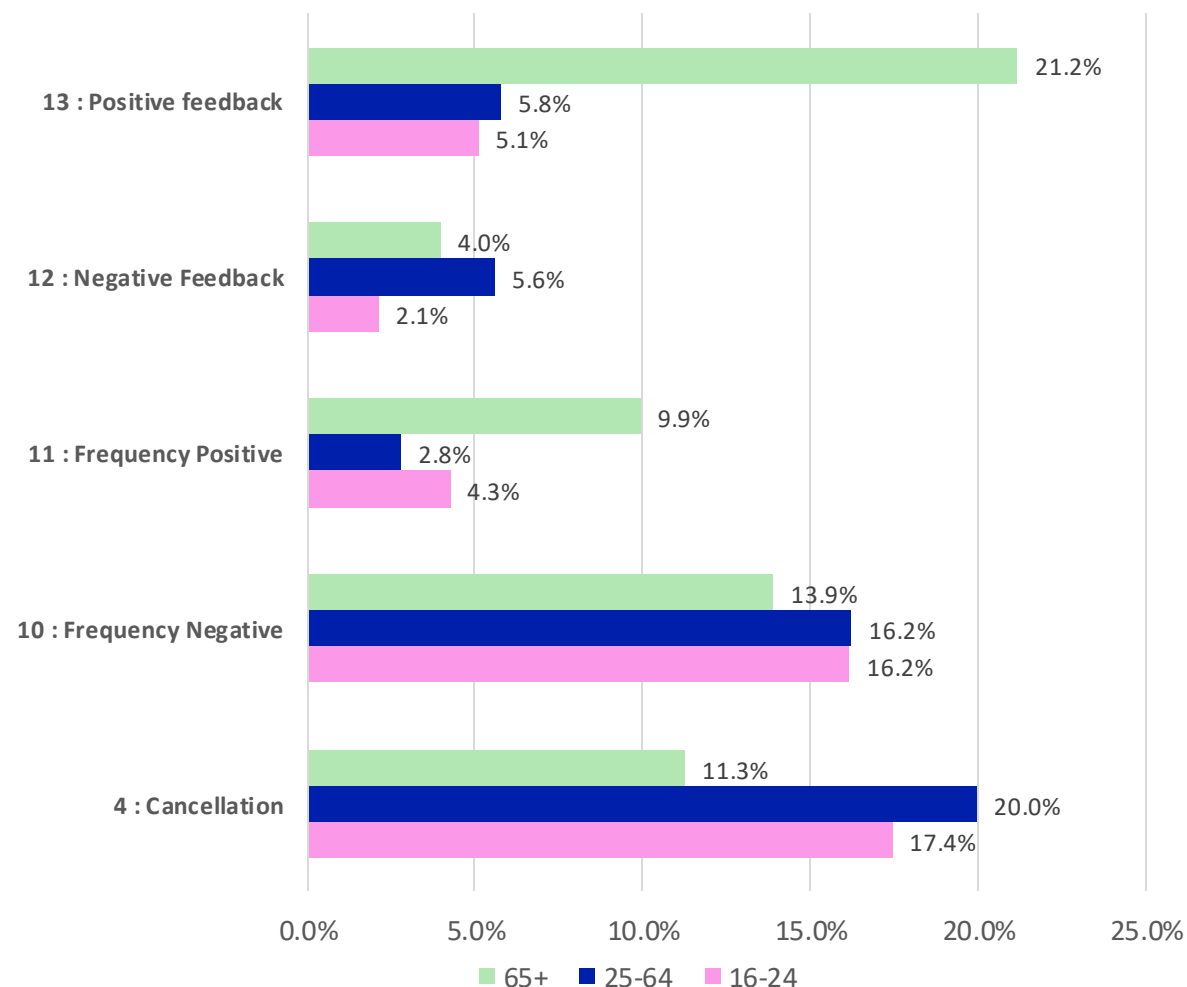
The following refers to 'free text' feedback from passengers asking about their views on changes to bus services

Qualitative Analysis

By enhancement type

- Older passengers were most likely to provide positive feedback and less likely to complain about cancellations.
- A similar proportion of middle aged and young people provided negative responses about frequency and cancellations.
- Negative feedback was highest amongst 25-64 yr olds when compared to other age categories.

Responses by age group



Q16: Is there anything else you want to feed back about the recent changes to bus services on this route, such as the frequency improvements?. Base: 958

Qualitative Feedback

For those who were positive about the changes, most mentioned improved frequency, and how this made it easier for them to catch the bus.

For those with more negative feedback, this centred around complaints about bus cancellations, meaning the buses often weren't as frequent as they were meant to be.

VERBATIMS

Qualitative feed back about the recent changes to bus services on this route, such as the frequency improvements

Positive feedback



Always clean and comfy

I am satisfied with the bus times now

The frequency has improved A LOT

As I work at a hospital the more frequent buses around the time, I finish has improved my journey home greatly as it means I don't have to take the 20-minute walk to the bus station after I've finished my shift.

I like how the local company increased the volume and frequency of the busses during daylight hours and how they lowered the price of a usual single to a pound for the local area.

I am more satisfied now as there is more opportunity for me to get this bus rather than me taking the walk which takes double the time



Buses are running frequently late, not on the bus route and even more concerning cancellation Just like last night all buses after 18.30 were all cancelled.

Cancellations are rampant, the delays are crazy.

The cancellation of 189 buses, especially evening time is quite alarming and unsatisfactory which results in getting to work late as well as taking cab which wasn't in planned.

Buses are still unreliable and don't arrive or leave at the scheduled times.

Needs to be more frequent Many cancellations leaving people stranded.

Buses have not become more frequent as often 15 mins late or they don't turn up at all



Quality standards and other details

BVA BDRC is certified to ISO 20252:2019 and 27001:2013, the recognised international quality standards for market research and information security, thus the project has been carried out in accordance with these standards.

- Adherence to the standard is independently audited once per year
- This project has also been carried out in conformity to the MRS Code of Conduct, GDPR, the UK's Data Protection Act, and all other relevant industry codes, legal and ethical requirements.
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence with these same standards.

Full methodological details relevant to the project are available upon request.

Images within this report have been sourced via Getty Images through subscription



Statistical Difference

This research has been designed to ensure robust sample sizes for analysis.

As this research has been conducted with a sample of the target audience, we cannot be 100% certain that a census of the whole population would yield the same results.

However, we can be 95% certain that the actual figure (in the population as a whole) falls within a certain range of the survey figure.

The percentages within the table represent the error variance for the achieved sample. So for example, if we were saying that 50% gave Keighley Superbus services a rating of ‘Very/fairly good’, we can be 95% sure that if we spoke to the whole population of Keighley Superbus users, the rating would be between 44.8% and 55.2%.

	Survey finding of...		
Base	5 / 95%	20 / 80%	50 / 50%
Total Sample (1915)	+/- 0.98%	+/- 1.79%	+/- 2.24%
<i>Keighley Superbus (227)</i>	+/- 2.84%	+/- 5.20%	+/- 6.50%
<i>New bus services (357)</i>	+/- 2.26%	+/- 4.15%	+/- 5.19%
<i>Daytime services (684)</i>	+/- 1.63%	+/- 3.00%	+/- 3.75%
<i>Evening services (647)</i>	+/- 1.68%	+/- 3.08%	+/- 3.85%

Reflections for future research

Cancellations

- Future waves of the survey should address potential links between cancellations and frequency improvements. This survey provided insights on the impact of the scheme frequency improvements, but high levels of cancellations were mentioned in open ended responses, particularly on evening services. This indicates that we cannot look at effects on frequency enhancements in isolation.

Bus User Focus Only

- This survey targets bus users on BSIP enhanced services. This neglects bus users who have shifted mode from bus to other modes between scheme implementation and the survey consultation being conducted. Therefore, mode shift to bus may be overstated and we are unable to understand motivations for this change in behaviour.

Actual Change in Patronage

- The survey deduces changes in usage based on survey responses. However, once a Data Sharing Agreement is finalised with bus operators, we will be able to report on actual changes in bus patronage for individual services, with survey responses providing further context on reasons for any observed changes.

Change in Circumstances

- “Change in Circumstances” was mentioned as a major factor for increased bus use amongst bus users. Future waves of research may want to consider what type of change in circumstance occurred. This could include a combination of economic circumstances, life changes such as jobs or change of educational institutions or internal migration.



Appendix

Classifications/ sample size – Day & Evening Schemes

SCHEME: (SUPERBUS)	P	PHASE	SERVICE	ROUTE DETAIL	SAMPLE
Keighley		1	K2 and K3	(Keighley – Braithwaite)	XX
Keighley		1	K7	(Keighley – Oakworth)	XX
Calderdale / Kirklees		1	X1 (formerly 503)	(Huddersfield – one stop in Elland – Halifax)	XX*
Calderdale / Kirklees		1	501	(Huddersfield – Lindley – Huddersfield Royal Infirmary – Elland – West Vale – Calderdale Royal Hospital – Halifax)	XX*
Leeds – Shipley		1	60 and 60A	(Keighley – Shipley – Leeds)	XX*

SCHEME: (Other DAY/EVE)	P	PHASE	SERVICE	ROUTE DETAIL	SAMPLE
		1	548/549	Halifax - Brighouse - Huddersfield	XX
		1	14	Leeds - Pudsey	XX*
		1	601 and 602	Bradford Outer Ring Road	XX
		1.5	164 and 165	Leeds-Selby	XX

P = service provider



The Keighley Bus Company



First



TLC Travel



Arriva Yorkshire

Routes where changes focused on Sunday timetable alterations are denoted above by an asterix *

Classifications/ sample size – Evening Schemes

SCHEME: (EVENING SERVICE)	P	PHASE	SERVICE	ROUTE DETAIL	SAMPLE SIZE
		1	126	Wakefield - Dewsbury	XX
		1	106	Wakefield - Hall Green via Kettlethorpe	XX
		1	148 and 149	Wakefield - Knottingley via Pontefract	XX
		1	268	Bradford - Wakefield via Cleckheaton	XX
		1	189	Wakefield - Castleford via Normanton	XX
		1	496	Wakefield - Upton via South Elmsall	XX
		1	444 and 446	Leeds - Wakefield via Rothwell	XX
		1	195 and 196	Wakefield - Hemsworth via Walton & Ryhill	XX
		1.5	140 and 141	Leeds - Pontefract (Leeds/Wakefield)	XX
		1.5	163	Leeds – Castlefield (Leeds/Wakefield)	XX
		1.5	156	Castleford - Ferry Fryston (Wakefield)	XX
		1.5	135 and 136	Pontefract – Chequerfield (Wakefield)	XX

P = service provider



The Keighley Bus Company



First



TLC Travel



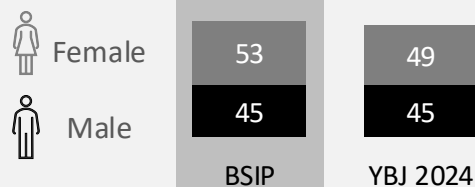
Arriva Yorkshire

Compared to the profile from YBJ, this audience tend to be younger, and there are fewer with disabilities

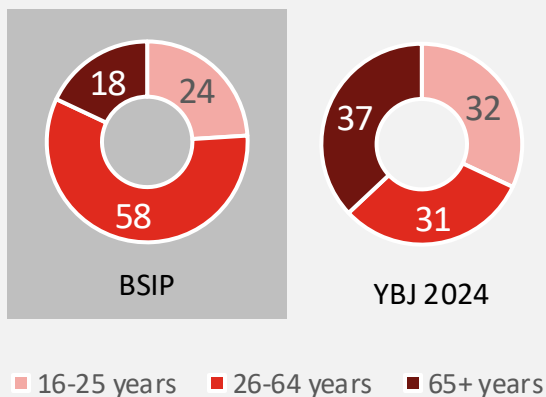
User profile – comparison with YBJ mid year 2024 - West Yorkshire

YBJ 2024 comparisons below are for the West Yorkshire area

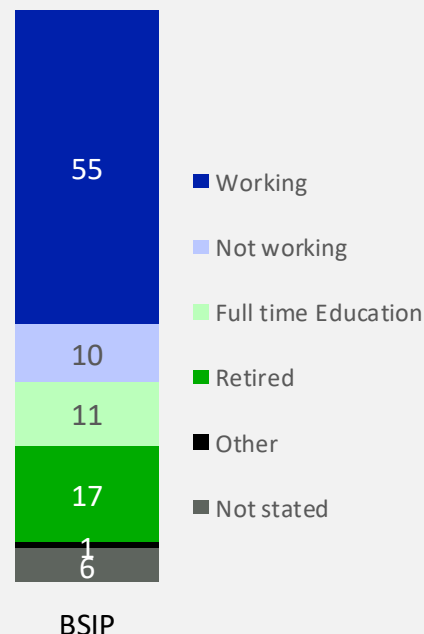
Gender (%)



Age (%)

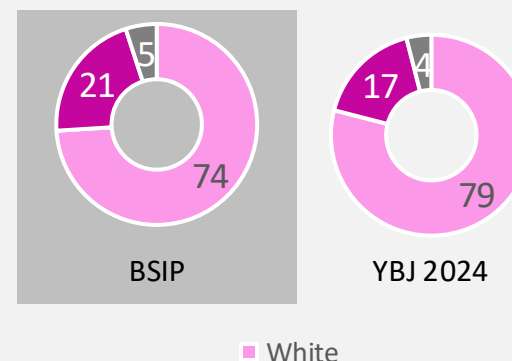


Employment Status (%)

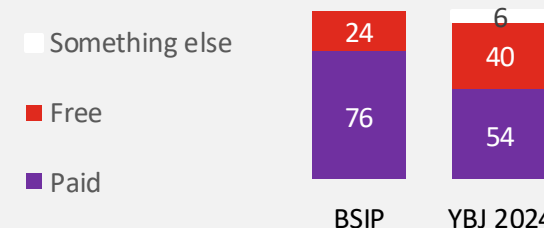


Data not collected for YBJ

Ethnicity (%)

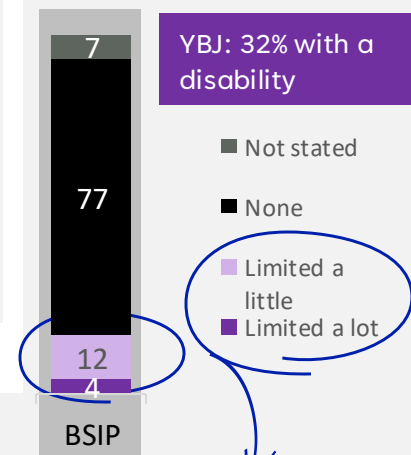


Concessionary free pass (%)



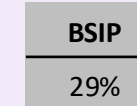
By 'concession' the questionnaire means 'senior person, disabled person or school card' - not discounted concessionary fare schemes like under 19s, 19-25

Day-to day impact of any disability (%)



YBJ: 32% with a disability

Affects ability to travel by bus



Data not collected for YBJ

Bus Stop Detail

Detail by route

Top bus stops used (those above 10% shown)

Superbus (day+eve)		
Route	First bus stop	Final bus stop
K2 and K3	Keighley Bus Station (34%)	Keighley Bus Station (36%) Braithwaite Whinfield Drive (10%)
K7	Keighley Bus Station (41%)	Keighley Bus Station (40%)
X1*	Huddersfield Bus Station (33%) Halifax Bus Station (22%)	Huddersfield Bus Station (21%)
501*	Huddersfield Bus Station (20%) Halifax Bus Station (16%)	Huddersfield Bus Station (27%)
60/60A*	Keighley Bus Station (16%) Leeds Bus Station (10%)	Keighley Bus Station (16%) Leeds Bus Station (12%)
Other (day+eve)		
548/549	Brighouse Bus Station (44%) Halifax Bus Station (28%)	Halifax Bus Station (28%)
14*	Leeds City Square (16%)	Leeds City Square (24%)
601/602	Shipley Market Square (34%) Bradford Royal Infirmary (16%)	Shipley Market Square (37%) Shipley Briggate (10%)
164/165	Leeds Bus Station (19%)	Leeds Bus Station (33%)

Service provider

- The Keighley Bus Company
- First
- TLC Travel
- Arriva Yorkshire

Q7a: Which bus stop did you use to get on this bus? Q7b. Which bus stop will you/did you get off this bus?
 Base:: X1: (202,) 501: (132) 60/60A: (184)548/549: (105) 14: (108) 164/165: (155) 126: (51) 106: (53) 148/149: (58) 268: (53) 189: (58) 496: (65) 444/446:: (50) 195/196: (55) 140/141: (50) 163: (47) 156: (56) K2/K3: (106) K7: (111) 601/602: (131) 135/136: (51)

Bus Stop Detail

Detail by route

Top bus stops used (those above 9% shown) All services run by Arriva Yorkshire

Evening Only		
Route	First bus stop	Final bus stop
126	Wakefield Bus Station (40%) Dewsbury Bus Station (22%)	Wakefield Bus Station (19%)
106	Wakefield Bus Station (40%) Sandal at Asda, Wakefield (10%)	Wakefield Bus Station (19%)
148/149	Wakefield Bus Station (43%) Pontefract Bus Station (13%)	Wakefield Bus Station (12%)
268	Bradford Nelson Street (20%) Wakefield Bus Station (20%) Dewsbury Bus Station (10%)	Bradford Nelson Street (12%)
189	Wakefield Bus Station (44%) Castleford Bus Station (18%)	Wakefield Bus Station (19%) Castleford Bus Station (18%)
496	Wakefield Bus Station (32%)	Wakefield Bus Station (17%) Hemsworth Bus station (12%)
444/446	Wakefield Bus Station (20%) Leeds Cultural C (18%)	Wakefield Bus Station (10%)
195/196	Wakefield Bus Station (51%) Hemsworth Bus Station (11%)	Wakefield Bus Station (22%)
140/141	Leeds Bus Station (24%) Castleford Bus Station (18%) Pontefract Bus Station (14%)	Castleford Bus Station (19%) Leeds Bus Station (17%) Pontefract Bus Station (13%)
163	Castleford Bus Station (20%)	None over 9%
156	Castleford Bus Station (43%) Airedale The Square Stop B 14% Airedale The Square Stop A 13%	Castleford Bus Station (23%) Airedale The Square Stop A (13%)
135/136	Pontefract Bus Station (78%)	Pontefract Bus Station (18%)

Journey Purpose

Top 10 origin-destination pairs Detail

Journey Purpose: Top Origin – Destination pair detail

44% FROM home TO...

- 12% Work
- 5% Other leisure
- 5% Home
- 4% Education or training

23% FROM work/work related TO...

- 15% Home
- 7% Work

41% TO home FROM...

- 15% Work
- 6% Shopping
- 5% Home
- 4% Visiting friends/family
- 4% Other leisure

20% TO work/work related FROM...

- 12% Home
- 7% Work

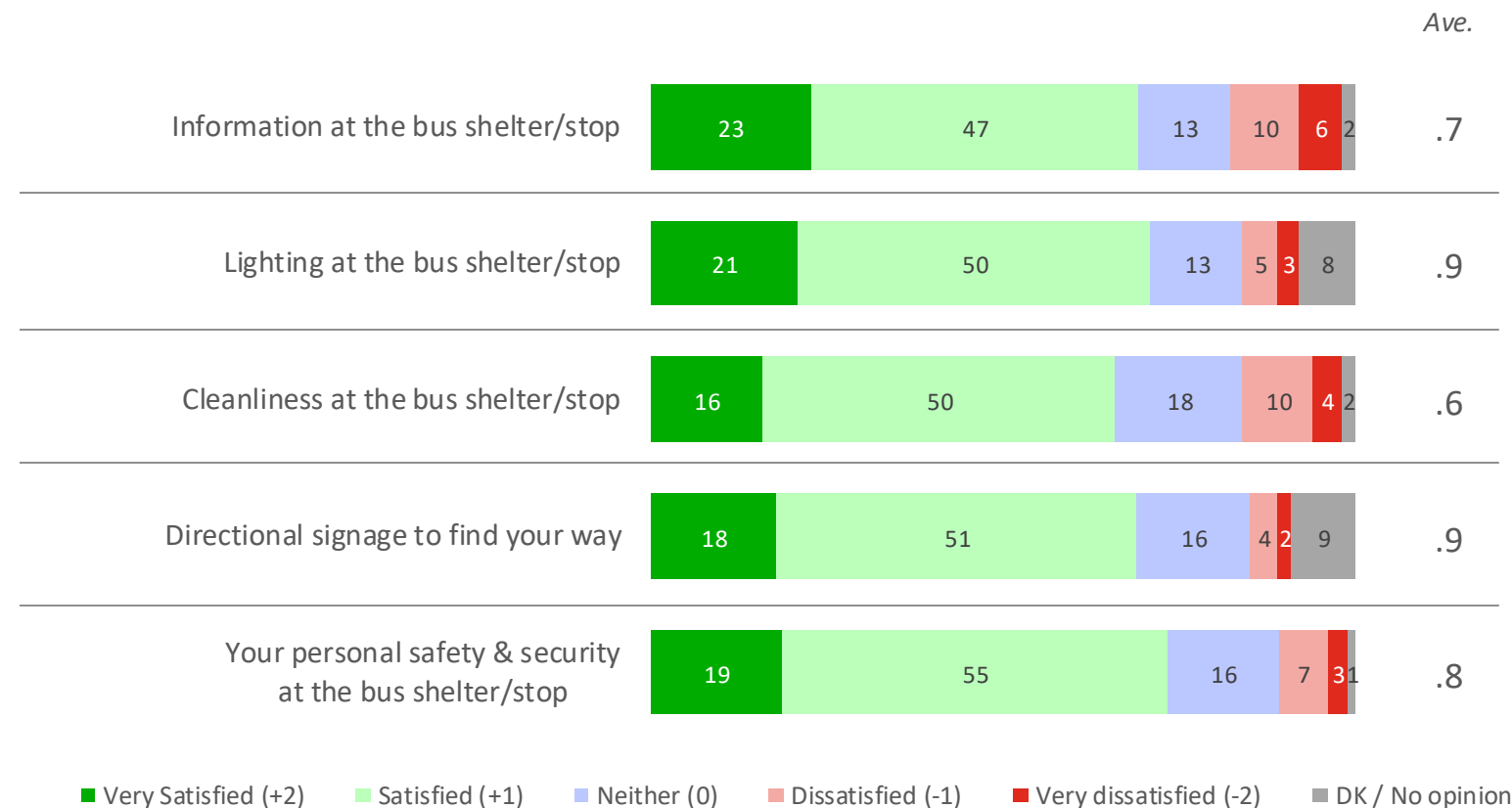
Q10: What is the **main** purpose of your current journey? Please tick the relevant boxes and select **only one** option in each column.
Base: 1915

Journey Start - ratings

Journey aspects before boarding bus

Passenger ratings for experiences before boarding the bus are positive, especially for signage and lighting at bus shelters (though most respondents likely travelled during daylight hours). However, cleanliness and information were the aspects with the lowest satisfaction levels.

Experience ratings - before boarding bus (%)



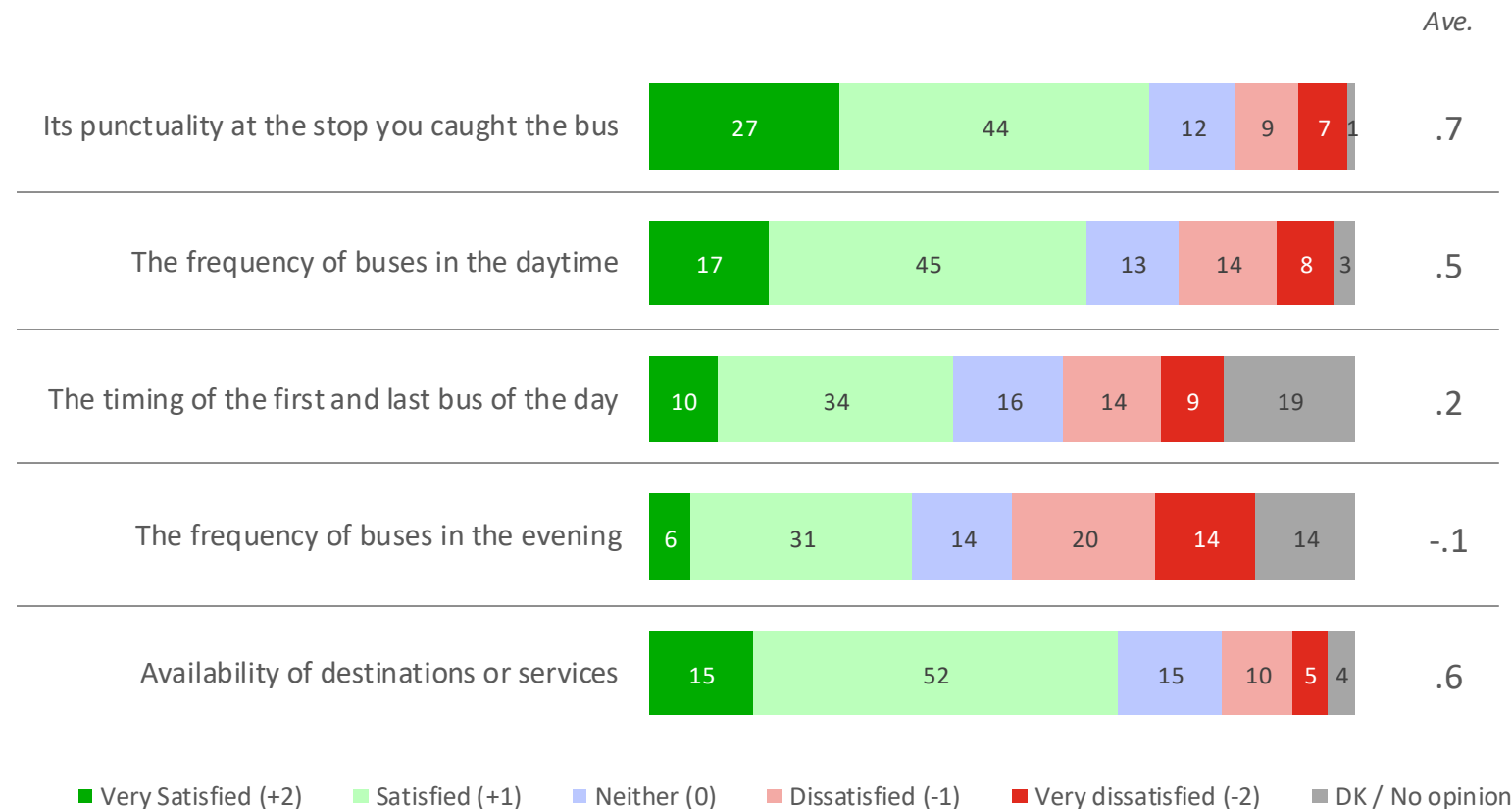
Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
Base: 1915

Journey Start - ratings

Journey aspects before boarding bus

Ratings for the frequency of buses in the evenings are lower compared to other experience ratings

Experience ratings - before boarding bus (%)



Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
 Base: 1915

Once on board, satisfaction ratings with the bus are reasonably stable across different dayparts

On Board Experience average ratings – detail (2) DAY PART

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

		Time of Day					
	All	Morning Peak	Off Peak	Afternoon peak	Evening	Saturday	Sunday
Length of journey (travel time)	1.1	0.9	1.2	1.0	0.9	1.1	1.1
Comfort of seats	1.0	0.8	1.1	0.9	0.9	0.9	1.1
Ease of ticket/pass purchase	1.3	1.3	1.3	1.3	1.1	1.3	1.3
Your personal safety on board	1.1	1.0	1.2	1.1	1.0	1.1	1.2
Accessibility (e.g., wheelchair and push chair access)	1.0	1.0	1.1	1.0	1.0	1.0	1.1
Access to information on the bus	0.9	0.9	0.9	0.9	0.8	0.8	1.0
Value for money of your journey	1.1	1.1	1.2	1.1	0.9	1.1	1.1

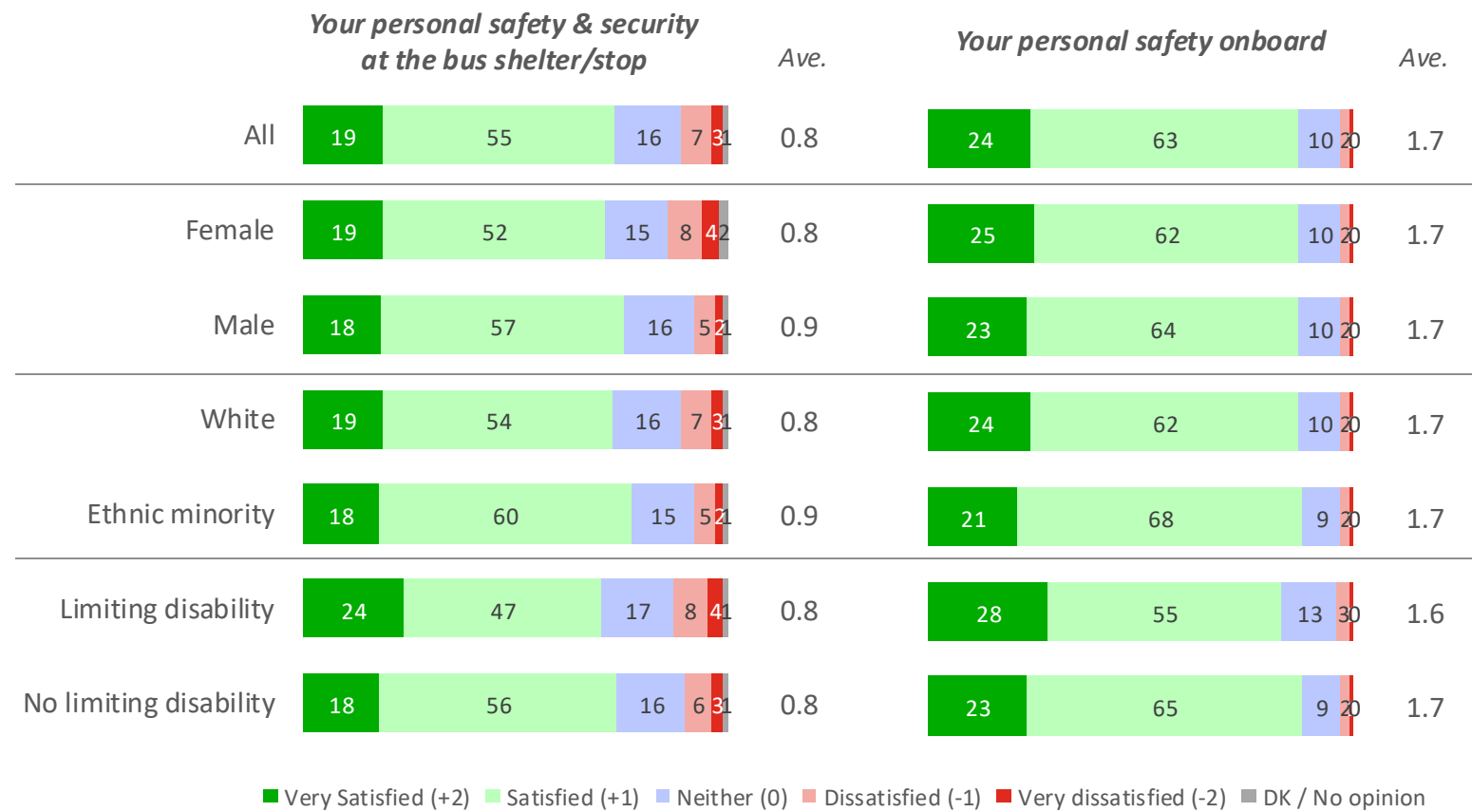
Q13: The following are parts of your journey when you're **on the bus**. Please rate on the scale how satisfied you were.
 Base: Morning Peak: 73 Off peak: 422 Afternoon peak: 185 Evening: 293 Saturday: 127 Sunday: 220

Personal Safety Focus

'Journey start' and 'onboard bus' ratings by key groups

There is little difference by demographics on views of personal safety, however passengers feel safer overall on the bus rather than at the bus stop

Satisfaction ratings for personal safety



Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were. Base: 1,915

Q13: The following are parts of your journey when you're **on the bus**. Please rate on the scale how satisfied you were.

Base: Female: 970 Male: 823 White: 1411 BME: 393 Limiting disability: 306 No limiting disability: 1455

VERBATIMS

Qualitative Feedback

Most respondents mentioned issues related to bus cancellations, frequency of buses, reliability and delays.

Qualitative feed back about the recent changes to bus services on this route, such as the frequency improvements



Q16: Is there anything else you want to feed back about the recent changes to bus services on this route, such as the frequency improvements?
Base: 1915

Frequent users were less positive about journey start ratings – in particular information at the bus stop, frequency of buses and cleanliness of the stop (more likely to be travelling for work/education)

Journey Start Experience ratings – detail (1) (Route usage)

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

Frequent User	Not frequent User
Use bus route at least once a week	Use bus route less than once a week

	Frequent User			Not frequent User		
	All frequent users	Weekday	Weekend	All not frequent users	Weekday	Weekend
Information at the bus shelter/stop	0.7	0.6	0.8	1.1	1.0	1.1
Lighting at the bus shelter/stop	0.9	0.8	0.9	1.1	1.1	1.0
Cleanliness at the bus shelter/stop	0.6	0.6	0.6	0.9	0.9	0.8
Directional signage to find your way	0.9	0.9	0.8	1.0	1.1	0.9
Your personal safety & security at the bus shelter/stop	0.8	0.8	0.8	1.0	1.0	1.1
Its punctuality at the stop you caught the bus	0.7	0.6	0.8	1.3	1.2	1.4
The frequency of buses in the daytime	0.5	0.4	0.5	0.9	0.9	0.8
The frequency of buses in the evening	-0.1	-0.1	-0.1	0.3	0.3	0.3
The timing of the first and last bus of the day	0.2	0.2	0.2	0.6	0.5	0.6
Availability of destinations or services	0.6	0.6	0.7	0.9	1.0	0.7

Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
Base: All frequent 1215 (weekday, 920, weekend 295) All not frequent 126 (weekday, 74, weekend 52).

Evening passengers are least satisfied overall, particularly with punctuality, frequency and timings of first and last buses.

Journey Start Experience average ratings – detail (2) DAY PART

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

	All	Time of Day				
		Peak	Off Peak	Evening	Saturday	Sunday
Information at the bus shelter/stop	0.7	0.7	0.9	0.2	0.8	0.9
Lighting at the bus shelter/stop	0.9	0.8	1.0	0.8	0.9	0.9
Cleanliness at the bus shelter/stop	0.7	0.6	0.8	0.5	0.6	0.7
Directional signage to find your way	0.9	0.8	1.0	0.7	0.9	0.8
Your personal safety & security at the bus shelter/stop	0.8	0.8	0.9	0.6	0.7	0.9
Its punctuality at the stop you caught the bus	0.7	0.6	1.0	0.1	0.8	1.0
The frequency of buses in the daytime	0.5	0.4	0.8	0.0	0.5	0.6
The frequency of buses in the evening	-0.1	-0.1	0.2	-0.4	-0.2	0.0
The timing of the first and last bus of the day	0.3	0.3	0.5	-0.1	0.3	0.3
Availability of destinations or services	0.6	0.6	0.9	0.2	0.6	0.7

Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
 Base: Morning Peak: 73 Off peak: 422 Afternoon peak: 185 Evening: 293 Saturday: 127 Sunday: 220

Older passengers tend to give better ratings, linked to being less likely to be travelling in the evening. There are no big differences by gender or disability status.

Journey Start Experience average ratings – detail (3) DEMOGRAPHICS

Scale (+2 Very Satisfied to -2 Very Dissatisfied, excl DK)

		Demographics						
		All	16-24	25-64	65+	Male	Female	Limited a little/lot
Information at the bus shelter/stop	0.7	0.7	0.7	0.9	0.7	0.7	0.9	0.7
Lighting at the bus shelter/stop	0.9	0.8	0.9	1.0	0.9	0.9	0.9	0.9
Cleanliness at the bus shelter/stop	0.7	0.4	0.7	1.0	0.6	0.7	0.7	0.7
Directional signage to find your way	0.9	0.8	0.9	1.1	0.9	0.9	0.9	0.9
Your personal safety & security at the bus shelter/stop	0.8	0.6	0.8	1.1	0.9	0.8	0.8	0.8
Its punctuality at the stop you caught the bus	0.7	0.6	0.7	1.0	0.7	0.8	0.9	0.7
The frequency of buses in the daytime	0.5	0.4	0.4	1.0	0.5	0.5	0.7	0.5
The frequency of buses in the evening	-0.1	-0.1	-0.1	0.2	0.0	-0.1	0.0	-0.1
The timing of the first and last bus of the day	0.3	0.3	0.2	0.5	0.2	0.3	0.3	0.3
Availability of destinations or services	0.6	0.7	0.5	0.8	0.6	0.6	0.7	0.6

Q12: The following are parts of your journey **before** getting on the bus. Please rate each on the scale of how satisfied you were
Base: 16-24: 378 25-64: 808 65+: 126 Male:589 Female:672 Limited a little/lot: 205 No limitations: 1037