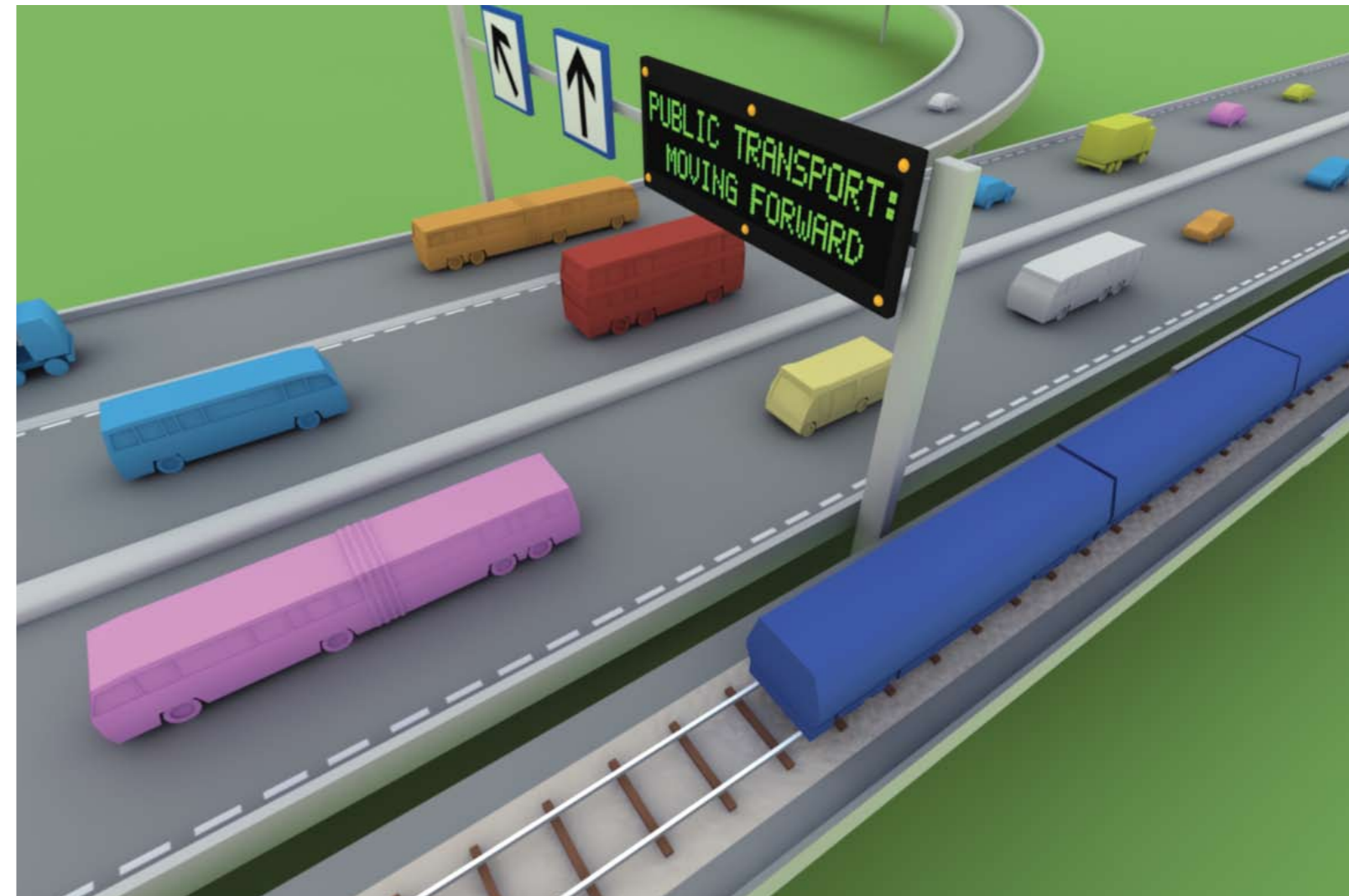




The Consumer Council

Public Transport – on the right track?



A Consumer Council Summary Report into attitudes to public transport in Northern Ireland



The Consumer Council

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Contents

| | Page |
|---|------|
| 1. Introduction | |
| Aims and objectives | 3 |
| Methodology | 4 |
| 2. Key findings | |
| Attitudes and views to public transport | 5 |
| Progress with public transport since 2002 | 9 |
| Encouraging public transport use | 12 |
| Future priorities for public transport | 15 |
| Other services | 17 |
| 3. The Future | |
| Key challenges | 20 |
| Recommendations | 21 |
| 4. Conclusion | 23 |
| Annex A | 24 |



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1. Introduction

The Consumer Council commissioned research to find out how public transport is viewed by those who use it regularly and by those who rarely, if ever, travel by public transport.

Understanding the views of passengers and non-passengers will help identify how much progress has been made in improving public transport over the last number of years. The views and feedback provided in this report will be used to help inform how public transport develops in the future.

Transport Strategy

The Regional Transportation Strategy (RTS) for Northern Ireland (2002-2012) set out a framework for the future planning, funding and delivery of transportation in Northern Ireland. It aimed to tackle deficiencies in the public transport system, improve infrastructure and promote sustainable transport with key outcomes for 2012.

The “Transportation Vision” within the RTS is: “To have a modern, sustainable, safe transportation system which benefits society, the economy and the environment and which actively contributes to social inclusion and everyone’s quality of life.”

As the statutory representative body for public transport passengers, the Consumer Council commissioned research to hear how the RTS has impacted on passenger views about public transport provision in Northern Ireland.

Aim

To ask a range of stakeholders including passengers, non-passengers, school children, public transport providers, airports, ports and other interested parties what developments, good or bad, there have been in public transport since the implementation of the RTS in 2002 and to identify what more needs to be done.

Objectives

- Identify current attitudes to public transport in Northern Ireland;
- Identify perceived improvements in public transport over the last five years;
- Identify barriers which prevent people using public transport;
- Identify the factors which would encourage people to use public transport in the future; and
- Identify future public transport priorities for the next five years.

Methodology

The approach adopted a number of research methodologies to ensure representative results were obtained. These are summarised below in Table 1.

Table 1

| Approach | Date | Participants |
|---|---------------------|----------------------|
| Five focus groups with passengers and non passengers* | January 2008 | 40 (age range 18-60) |
| Quantitative Survey (Ipsos Mori Omnibus Survey) | February 2008 | 993 adults |
| Four focus groups with school children | March 2008 | 16 (age range 12-16) |
| In depth interview with key stakeholder organisations** | February – May 2008 | 18 |

* Passengers were defined as those who use the bus or train at least once a month, while non-passengers were those who used public transport less than once a year.

** A full list organisations who participated in the depth interview can be found in Annex A

2. Key Findings

Attitudes and views to public transport

The research findings show people in Northern Ireland still largely depend on the car. Three-quarters travel by car at least three times a week.

Despite our dependency on the car, there has been a positive shift in the number of people using public transport:

- In the last five years the total number of journeys passengers have made using public transport has grown by almost 7 million to 79.4 million in 2007/2008.
- Buses are used by more than half (55 per cent) of the population, while trains by more than a third (37 per cent).

Buses and trains are used more frequently in urban areas; this reflects the greater availability of public transport and network coverage in these areas.

In rural areas there is greater dissatisfaction with choice, convenience, and frequency of service.

Value for Money

Value for money was identified as the top concern for passengers. Providing a low cost fare was viewed as essential to encourage more people to use public transport. A number of fare promotions have been introduced on bus and rail services, for example Multi-Journey tickets in October 2002 and Travel Cards in April 2003 which have helped passengers save money by reducing the cost compared to a full fare ticket.

Knowledge and awareness of these offers is generally low. Smartlink cards¹, weekly tickets or monthly tickets are cheaper than buying the equivalent single or return ticket. Smartlink cards can provide up to 25 per cent saving on the normal cash fare². However, only 30 per cent of people had heard of multi-journey cards and only 3 per cent use a multi-journey card regularly. Even among frequent bus and train passengers fewer than 10 per cent regularly use multi-journey cards.

Service Design and Quality

There is a perception that the age of buses and trains, frequency, convenience and geographical coverage of public transport is better in other countries compared to Northern Ireland. Examples given include London, Glasgow, Liverpool and Dublin

¹ Smartlink is a plastic card which can be loaded in one of two ways allowing a passenger to buy either a certain number of journeys in advance (Multi-Journey or MJ) or to buy a week or a month's worth of travel (Travel Card).

² Smartlink savings, February 2008

“There needs to be greater coverage in Northern Ireland. In England, Scotland and Dublin there are buses night and day.”

(Ballymena, female, age 25 to 40)

“In Yorkshire there is a regular service. You are never standing waiting.”

(Derry Passenger)

Customer service

Customer service was rated the top aspect of bus services, with 57 per cent believing this to be very or fairly good. In rural areas this rating dropped to 47 per cent.

For train services 33 per cent of all respondents rated customer service as good. However regular train users view customer service more positively, with 92 per cent rating it as good.

Customer service was found to be an area of concern for people with disabilities and older people. This put them off using public transport.

Examples of the issues are:

- Drivers not recognising disabilities such as blindness and not offering the appropriate help to blind people when buying tickets;
- Drivers not stopping for people who are blind or have other disabilities;
- No enforcement of priority seats for the elderly and disabled; and
- Staff not trained in the operation of equipment that is meant to make buses more accessible.

“Some drivers and other staff in the station can be very impatient, rude and lack understanding.”

(Royal National Institute for Deaf People (RNID) Representative)

“More can be done in terms of staff being more sensitive to the needs of older people.”

(Help the Aged Representative)



Information provision

Passengers felt that the provision of information could be improved. Suggestions on ways to improve how information is provided to passengers include:

- Up-to-date timetables at all bus stops;
- Verbal and electronic updates at bus and train stations for those with visual and hearing difficulties;
- An out-of-hours telephone line for timetable information for people who do not have internet access;
- Better promotion of multi-journey tickets; and
- More information available in languages other than English.

Condition of facilities

The condition of bus stops and shelters was a concern for all bus users, in particular rural passengers who rate bus stops less favourably. This is due to the fact many have no physical structure which results in people having to stand in the cold or rain with no shelter.

The main issues with bus stops and shelters were:

- No bus shelters in place so passengers and school children have to stand in the rain;
- Vandalism;
- Lack of lighting in places;
- Bus shelters that are located out of sight from oncoming traffic were viewed as a hazard for passengers;
- Distance, especially for rural passengers, from their home to the bus stop.

“In the country there is no post (marking the bus stop) or lighting.”

(Ballymena, Passenger)

“There is no bus stop anywhere near my house. I have to walk 25 minutes.”

(Derry, Passenger)

“There is never any glass. It is all perspex and even that is bust. They replace it and then it is kicked in again.”

(Limavady, school passenger, age 15 to 16)

“There is no shelter at all.”

(Limavady, school passenger, age 12 to 13)

Children criticised the condition of bus stops, in particular the amount of graffiti, vandalism and lack of shelter. Children generally felt measures to prevent vandalism and damage, such as the installation of cameras has not been successful.

The main issue for bus users in Belfast was the constant vandalism of glass bus shelters. However, there was recognition that this is not the fault of transport providers and that repairs are often made quickly.

“Round the corner from where I live there is a bus-stop, and nine times out of ten it is smashed to bits.”

(Belfast, Non-passenger)

Children also thought that more could be done to improve the condition of buses.

“They just don’t clean it until the end of the night.”

(Limavady, school passenger, age 12 to 13)

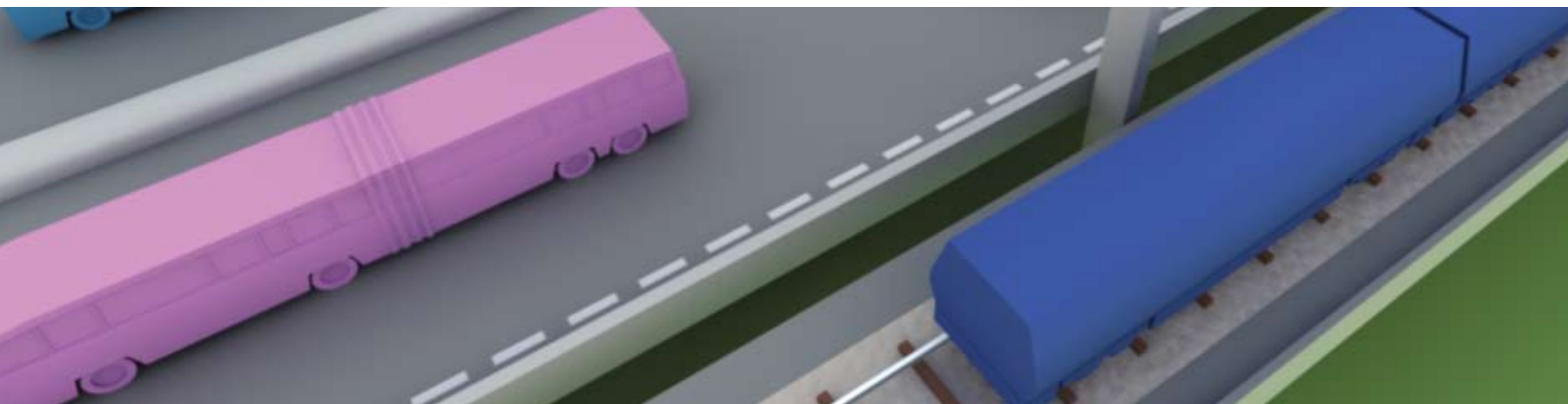
Integration of bus and train services

Bus and train services need to be better integrated to make it easier and more convenient for passengers to use more than one service or form of transport. This is important to support passengers who depend on more than one service to get to their final destination. For example, a commuter who uses a train and Metro bus service to get to and from work.

In towns and cities where both buses and trains operate, better timetabling of services was suggested. Just over a third (37 per cent) of those surveyed were satisfied with links between different modes of public transport. Ensuring timetables and services complement one another so people can easily move from one form of transport to another was viewed as an important feature.

“Is there any co-ordination? Doesn’t seem to be any co-ordination between buses and trains. In Castlerock the buses and trains leave at similar times rather than complementing each other.”

(RNIB Representative)



Progress with public transport since 2002

A mixed view emerged about the standard of public transport in Northern Ireland. Improvements to public transport highlighted since the launch of the RTS in 2002 include:

- An improved public transport system (Metro) in Belfast;
- Regular bus services between major towns;
- Investment in new trains;
- Free travel for the over 60s; and
- Good bus service from Belfast to Belfast International Airport and George Best Belfast City Airport.

Areas where problems were identified include:

- Rural coverage;
- Frequency of off-peak services;
- A limited rail network;
- Customer service for elderly and disabled people;
- The condition of bus stops and shelters; and
- Expensive fares.

What progress do people feel there has been?

The new buses and trains were acknowledged by both those who use public transport and those who do not. The new vehicles are thought to be more comfortable and also provide better access to those with mobility problems.

“Buses and trains are a lot better. Especially the trains. There are not as many breakdowns in the past year compared to old trains.”

(Derry, Passenger)

“I think the public transport has got better, especially as the buses are now up-to-date.”

(Belfast, Passenger)

For many transport users, bus and train services provide an alternative to the car for social excursions like shopping.

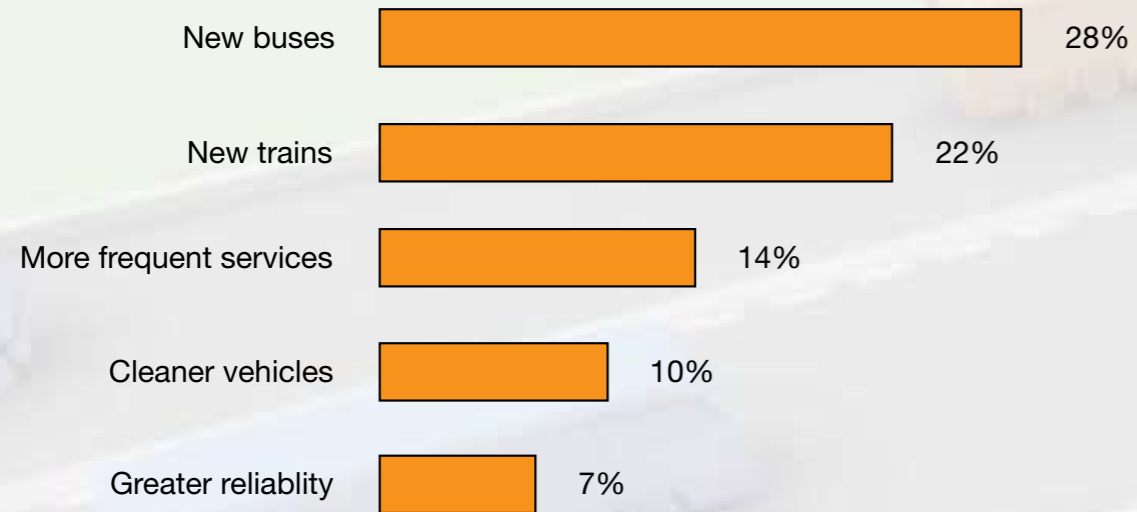
“I’m not a great driver, so I like using the bus. I can relax and get where I need to go without being stressed.”

(Belfast, Passenger)

Figure 1

Top five improvements in public transport over the last 5 years

Q: What improvements, if any, have there been in public transport in Northern Ireland over the last five years?



Base: All respondents (994)

What progress has there been from a transport providers view?

I. Patronage

In five years Translink has increased passenger numbers by 43 per cent and believe it is on its way to meeting the RTS target of increasing passenger numbers by 60 per cent over ten years.

II. Accessibility

Translink state all new buses and trains are fully accessible and there are plans to make all railway stations and halts accessible.

The research found that many stakeholders felt more work was needed to improve wheelchair access onto buses and trains. Where ramps are provided it is important they are in good working order and there should be more promotion of disability spaces available on buses for wheelchair users.

Stakeholders acknowledged improvements have been made in terms of the information provided to passengers. This included better timetable information at bus stops and train stations and live timetable updates at some of the bus stops in Belfast.

III. Frequency

According to transport providers, road congestion must be reduced to allow services to run on time. Increased road congestion means bus services take longer to complete their route. This results in additional buses being required on each route to maintain the scheduled number of services which limits opportunities to expand or develop additional services.

“I think Translink has been doing very well. It definitely is trying to meet objectives. But it can only go so far in what it does. If we don’t have bus priorities the buses have to sit in congestion like everyone else.”

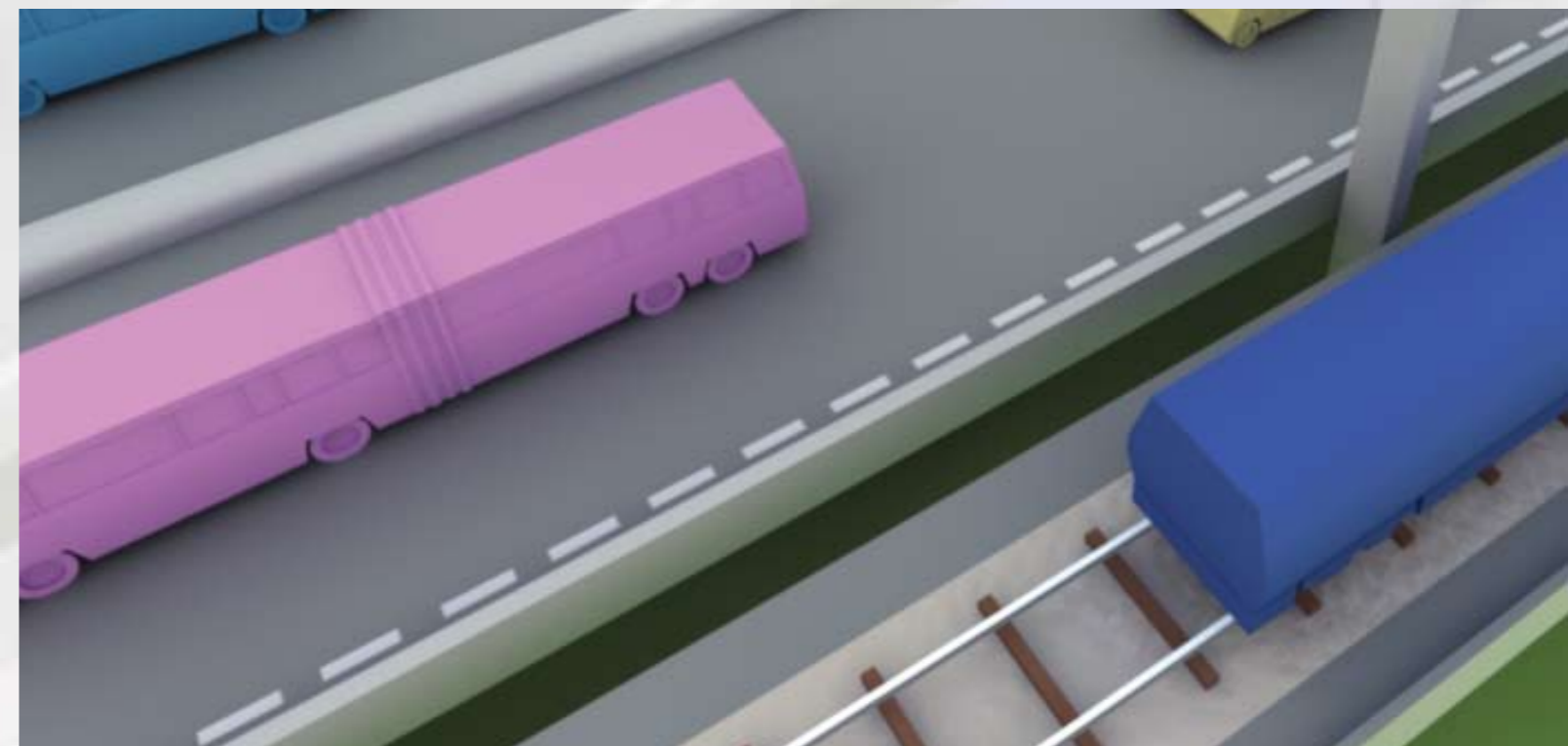
(Federation of Passenger Transport Representative. FPT)

Rural transport provision

More work is needed to meet the needs of rural and isolated communities. People living in rural areas were dissatisfied with choice, convenience and frequency of services.

“We just seem to have been forgotten about.”

(Enniskillen, Non-passenger)



Encouraging public transport usage

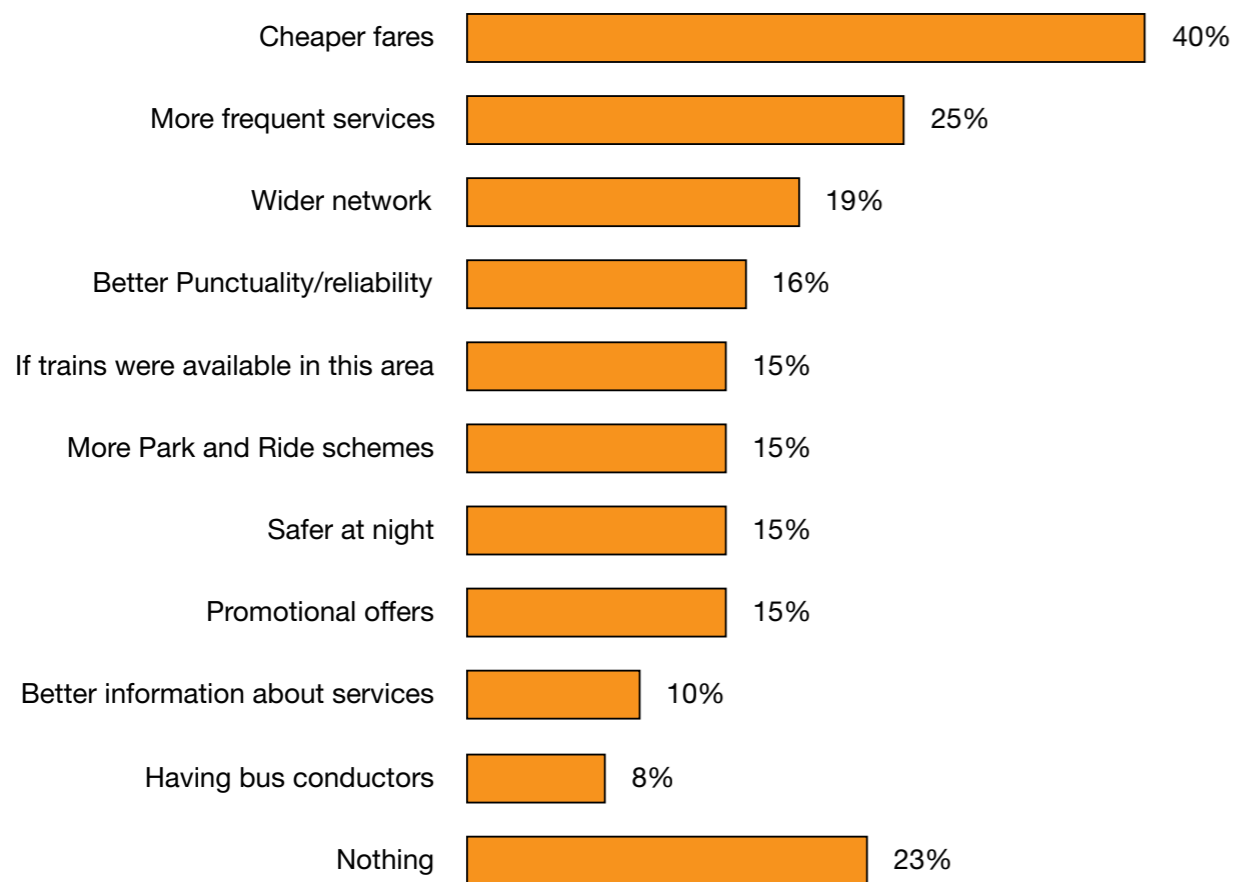
Cheaper fares, increased fare promotions and greater discounts, for example on multi-journey tickets, are the greatest factors to encourage more use of public transport. Increased service frequency is the second biggest factor which would encourage more people to use public transport followed by improved coverage especially in rural areas.

Figure 2.3 below gives a breakdown of the top factors to encourage the use of public transport.

Figure 2

Top ten factors that would encourage greater use of public transport

Q: Which of these would encourage you to use public transport more/at all?



Base: All respondents (994)

There are some differences between what would encourage greater use of public transport among people in rural and urban areas. Table 2 highlights these differences.

Inadequate service provision is perceived to be a major factor for the limited use of public transport in rural areas. Together with long distances to the nearest bus stop, it makes the use of private cars more appealing.

Table 2

| Factors that would encourage greater use of public transport | People in rural areas | People in urban areas |
|--|-----------------------|-----------------------|
| More frequent services | 34% | 22% |
| Availability of trains in the area | 27% | 11% |
| More Park and Ride schemes | 21% | 13% |
| Better information about services | 14% | 8% |
| Greater promotion of services | 14% | 8% |
| Better punctuality / reliability | 10% | 18% |



Current non-users

For some non-users (36 per cent) nothing would encourage them to use the bus or train.

“I don’t think any improvement could coax me away from the car.”

(Belfast, Non-passenger)

But for other non-users the greatest factor to encourage them to use public transport is cheaper fares (27 per cent), followed by more frequent services (23 per cent). Table 3 provides a full breakdown of users and non-users views.

Table 3

| Factors that would encourage greater use of public transport | | |
|--|-------|-------------|
| | Users | Non - Users |
| Cheaper fares | 48% | 27% |
| More frequent services | 26% | 23% |
| Wider network | 19% | 19% |
| Better punctuality/reliability | 20% | 7% |
| If trains were available | 15% | 16% |
| Park and Ride | 14% | 17% |
| Safer at night | 17% | 11% |
| Promotional offers | 19% | 7% |
| Better information | 11% | 8% |
| Bus conductors | 11% | 4% |
| Nothing | 14% | 36% |

Future priorities for public transport

The main priorities for the future of public transport are to make the services better value for money, more frequent and a wider network coverage.

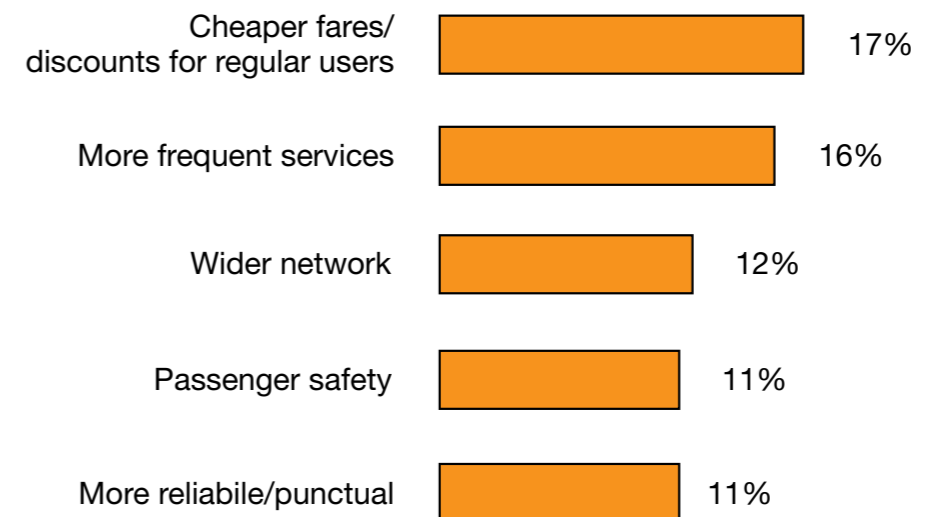
Public transport should be an easy option. Integrated ticketing and online booking systems are viewed as important to ensure travelling by public transport is hassle free.

People need to be able to book journeys, take advantage of fare offers and promotions easily no matter if they use a call centre, station or online website. All systems should provide the same information and advice to passengers.

Figure 3

Top five priorities for public transport in Northern Ireland

Q: What should be the top priorities be for public transport in Northern Ireland in the future?



Base: All respondents (994)

New Initiatives for future public transport in Northern Ireland

Respondents provided views on a number of potential initiatives for public transport, the findings can be found below in Table 4.

Table 4

| Initiative | Pros | Cons |
|---------------------------|--|---|
| Integrated ticketing | <ul style="list-style-type: none"> • Make travel easier • Make journey costs cheaper | <ul style="list-style-type: none"> • Where bus and train services are not well co-ordinated, integrated ticketing would not benefit passengers |
| Automatic ticket machines | <ul style="list-style-type: none"> • Reduced queuing times | <ul style="list-style-type: none"> • Passengers are keen to ensure automatic ticket machines do not replace staffed kiosks • Vandalism |
| Online booking | <ul style="list-style-type: none"> • Cost benefits • Journey planning • Quicker ticket purchase | <ul style="list-style-type: none"> • Those without access to the internet are excluded from the benefits of an online booking system |
| Congestion charging | <ul style="list-style-type: none"> • Long term environmental benefits if people shift from their cars • Road improvements through money raised | <ul style="list-style-type: none"> • Measure would force people on to public transport rather than encourage them • Current public transport system is not good enough to justify a congestion charge • People would need clear information on where the money raised by congestion charging is invested. • Impact to small businesses in the city centre through charges |
| Rapid Transit System | <ul style="list-style-type: none"> • Would help encourage public transport use in Belfast | <ul style="list-style-type: none"> • Reduced queuing times • Limited benefit to those living outside Belfast • Money could be better spent improving transport in rural areas |

Other services

Airports and Ports

Travellers to and from Northern Ireland often travel by sea or air, therefore access to our airports and ports is important not just for consumers but the economy.

One-third of people (35 per cent) are satisfied with the current public transport links to the airports and ports.

More direct links from outside Belfast to the ports and airports was viewed as an important development especially for people from outside Belfast. For example, having to travel into Belfast to go out again for Belfast International Airport was unacceptable for some people.

The bus service to Belfast International Airport was identified as being less value for money when compared to other travel options, for example, a group travelling together in a taxi.

“It’s not very good value for money. If there are a number of passengers, for example a family, it would be cheaper to get a taxi.”
(Belfast International Airport Airline Representative)

The development of train services to airports was viewed as offering passengers more choice but further development of bus services is recognised as being important at present.

Access to ports are considered reasonably good, though some specific changes or improvements were suggested:

- a faster train link between Belfast and the Port of Larne;
- better co-ordination of bus and train services with ferry sailing times; and
- improved promotion of bus and rail services to Northern Ireland ports and how they connect with sailing times.

School Age Children and Public Transport

Some children use public transport to travel to and from school. Understanding what would encourage them to use buses, beyond their school years is important for the future design of public transport.

“If they are not bought in early enough, their experiences aren’t positive enough to want to use public transport... there is an opportunity missed here.”

(Northern Ireland Commissioner for Children and Young People
(NICCY) Representative)

It is concerning that among older children the general consensus was that once they had learnt how to drive they did not expect to make regular use of public transport.

Apart from travelling to and from school, public transport was not used by any of the participants. Lifts from parents or travelling with parents in cars was the main way for children getting around outside of school.

I. Travel to school

Adults and children are unhappy with the current bus pass system for school buses and believe free travel should be provided to all school children, not just those who live outside three miles of their school.

“In local authority areas in England and Wales, travelling to school is free of charge. We have this dreadful, disparate system here.”

(NICCY Representative)

II. New school buses

Children seem to respect the new buses more and are more likely to keep them in good condition:

“The old buses were terrible.”

(Newry group, age 15 to 16)

“Children are very positive about new school buses with wider aisles, more space, greater comfort and seatbelts.”

(NICCY Representative)

III. Safety on School buses

Children had concerns about overcrowding on school buses. There were issues around safety when getting on and off buses as well as more regular evening schedules to suit children who have to stay at school late in the evening.

“My bus is packed in the morning. We could do with a double-decker.”

(Newry, age 15 to 16)

IV. Customer Service on school buses

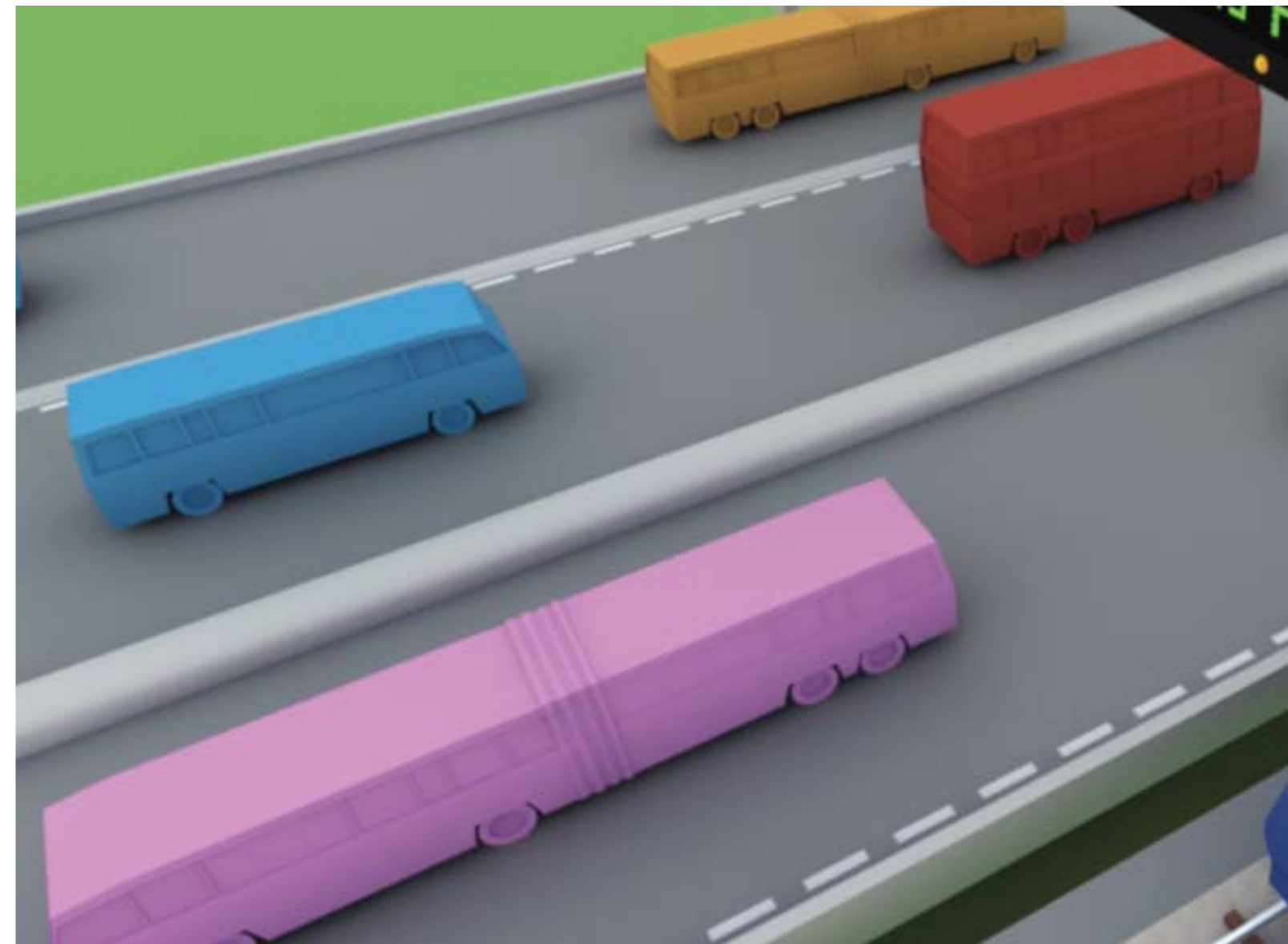
As with other stakeholders, children have mixed experiences and views of bus drivers. School children had a more positive view of school bus drivers. One of the reasons for the good relationships with the school bus drivers is because many drivers get to know the children.

“School bus drivers are friendlier because they know you more. But the other ones [public bus drivers] just say nothing.”

(Limavady, age 12 to 13)

“We have the same bus driver every morning and he would wait on me and my friend. They can be nice in that way.”

(Limavady, age 15 to 16)



3. The Future

Consumers and stakeholders both recognise progress has been made in how public transport is delivered across Northern Ireland. Passenger numbers have increased through investment in new buses and trains and improved frequency of services since 2002.

Public transport providers and Government must focus on improving the coverage and frequency of services. Value for money, reliability and punctuality are key performance measures passengers consider when choosing to travel by public transport and must remain a focus for transport providers.

Key challenges

Increasing passenger numbers and moving people away from car dependency

Increasing passenger numbers and reducing Northern Ireland's dependence on the car is an aim shared widely across society. From the research undertaken it is clear to achieve this aim a number of challenges remain:

- Ensuring services provide value for money;
- Seeking to understand why nothing would encourage 36 per cent of non-users to use public transport and taking action to tackle this;
- Encouraging children to continue to use public transport. A particular focus must be upon older children as many believed once they had learned how to drive they did not expect to make regular use of public transport; and
- Continued financial investment to grow the rail network and improve bus priority programmes, such as quality bus corridors and bus prioritisation.

Improving network and frequency of services

Develop a public transport system that is linked together. Making sure bus services complement one another, that bus and rail services are co-ordinated and provide ticket options that can be used across all modes and services.

Recommendations

Value for money

Transport providers must provide the lowest cost fare to encourage public transport use. The emphasis needs to be on low fares to increase passenger numbers and retain current passengers.

There needs to be further promotion of multi-journey cards and other fare promotions. The cheaper fares offered by multi-journey cards could help address issues the public have around the value for money of public transport. Many people are not aware of the savings which are available. Increasing awareness of these offers and encouraging people to make use of them will encourage greater use of bus and train services.

Anyone who is eligible should be encouraged to make use of the concessionary fares scheme, which provides free or reduced fare travel across trains and buses. For example free travel is available for senior citizens, 60+ and registered blind passengers while half fares are available for children, those in receipt of Disability Living Allowance and anyone refused a driving licence on medical grounds.

Those representing people with disabilities would like to see subsidies for taxi fares given their heavier reliance on these services and also because sometimes accessible taxis can be more expensive.

Wider network and more frequent services

Public transport services should complement each other to serve the needs of the public. People living in rural areas are most dissatisfied with choice, convenience and frequency of services. All organisations involved in public transport provision need to consider these issues in order to improve the network and services.

Choice and Convenience

The current levels of satisfaction with bus and train services need to be developed to ensure choice and frequency is adequate for all consumers. Better co-ordination of services by different providers, particularly in rural areas, is required to ensure a public transport system that meets passengers' needs.

Condition of Stops

The condition of bus and train stops and shelters was rated most poorly by passengers. Access to and the condition of bus stops and train halts is an important factor to improve public transport in Northern Ireland.

Examining access to and condition of bus stops needs to be a priority among Government and transport providers to make public transport a viable option in rural areas.

Investment

Further investment in roads and prioritising bus routes and lanes will help to increase frequency of bus services and reduce congestion.

Government should consider more investment in the railway network to provide faster and more regular services on existing routes, for example, from Belfast to Derry and Lisburn and to establish new routes to service parts of Northern Ireland that currently do not have any access to trains.

Customer Service

Staff training is essential to ensure services are effective for all passengers. Older people and people with disabilities referred to issues and attitudes they faced when using public transport. Any training should be implemented and evaluated in line with the Accessible Transport Strategy.

Other Issues

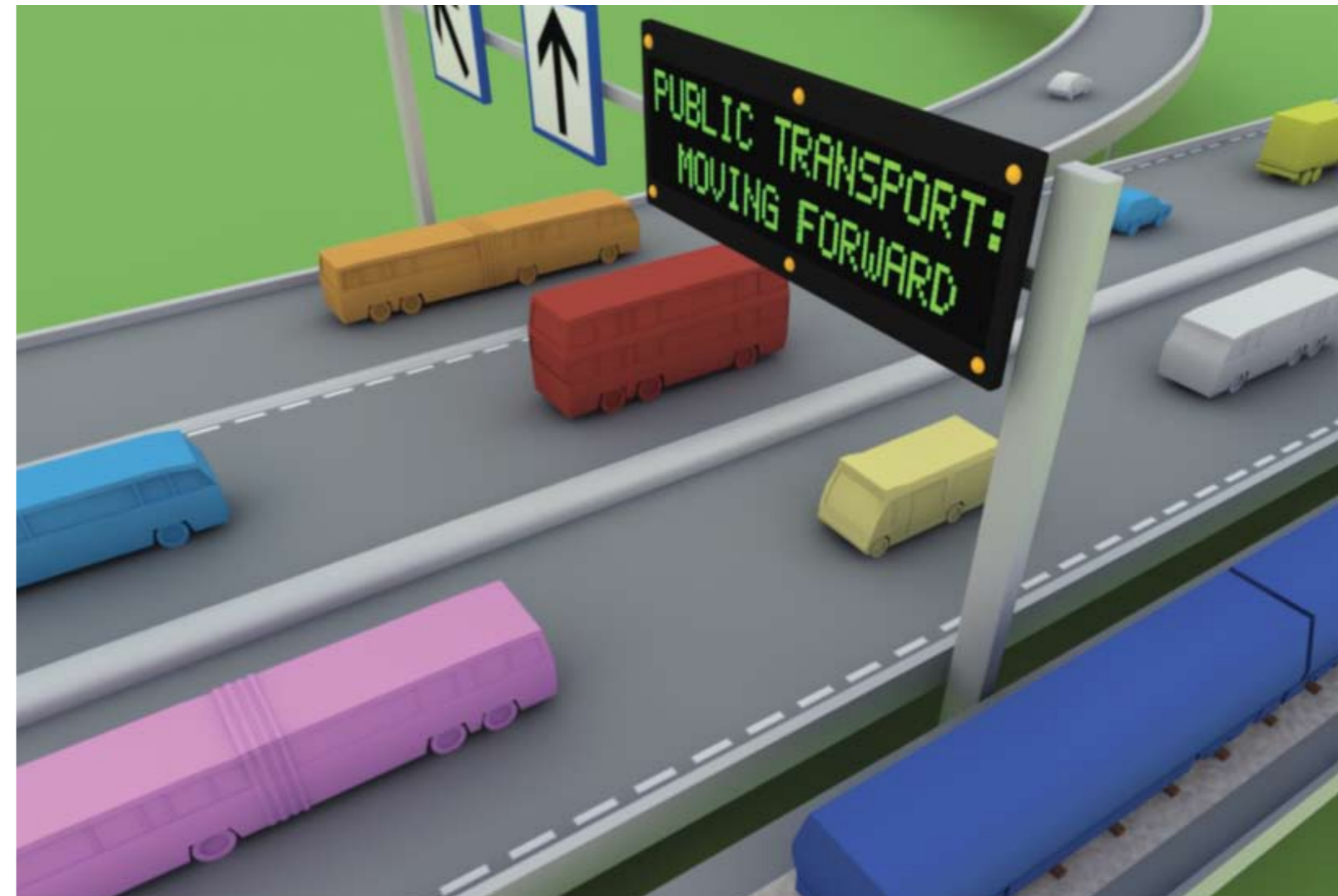
Bus routes from other parts of Northern Ireland to airports should be developed. Ferry sailing times and bus and train services should be better co-ordinated.

4. Conclusion

Significant progress has been made since the RTS was launched in 2002. There has been large scale investment in bus and trains, in infrastructure and passengers numbers have increased.

But more needs to be done; Northern Ireland still depends on the car. The shift onto buses and trains has commenced but the challenge is to sustain and build on this. Government, transport providers and consumers all have a role and responsibility in developing the public transport system in Northern Ireland and reverse the current trend of dependence upon private vehicles.

Public transport must offer passengers a quality experience, a point of difference that allows them to retain and gain customers even when belts are being tightened. Our society, economy, expectations and standards have moved forward since 2002 – we need to reset our sights for what we want from public transport.



ANNEX A

Organisations that undertook in-depth Interviews

- NICCY (Northern Ireland Commissioner for Children & Young People)
- Help the Aged
- Disability Action
- STEP (South Tyrone Empowerment Programme)
- RNIB (Royal National Institute of Blind People)
- RNID (Royal National Institute for Deaf People)
- IMTAC (Inclusive Mobility and Transport Advisory Committee)
- NILGA (Northern Ireland Local Government Association)
- Translink
- Federation of Passenger Transport (FPT)
- Down Community Transport
- George Best Belfast City Airport
- Belfast International Airport
- Port of Larne
- Stenaline
- Belfast International Airport Airline Representative
- George Best Belfast City Airport Airline Representative
- Federation of Small Businesses