

Essex Bus Passenger Survey 2025

Results

August 2025 - Revision 2

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Demographics

2025 Survey & Bus £3 Promotion

Essex Bus Survey - Context

Essex Bus User Survey – June 2025

In June 2025, Essex County Council conducted its own Bus User Survey to capture a snapshot of public sentiment regarding the local bus network. This initiative builds on the surveys carried out in 2023 and 2024, enabling the Council to track changes in public perception over time and compare current feedback with previous findings. The survey included both face-to-face interviews and online responses, offering a comprehensive view of user experiences across Essex.

Face-to-Face Surveys

As in previous years, face-to-face interviews were conducted at three of the original four key bus stations: **Basildon, Colchester, and Chelmsford**. Due to redevelopment at Harlow Bus Station, interviews in Harlow were carried out in the town centre and near the railway station. For 2025 additional survey locations included **Basildon Hospital** and **Billericay Train Station**. These were selected to gather insights ahead of the planned electrification of bus services in Basildon. The face-to-face survey was conducted between **16th and 28th June 2025** by independent research agency **Lake Market Research**.

- **Bus users** were asked 24 questions covering journey experience and demographics.
- **Non-bus users** responded to 10 questions focused on travel habits and barriers to bus use.

Online Surveys

In response to public feedback from the 2024 survey, the online survey period was extended from two to four weeks, running from **2nd to 30th June 2025**. This allowed more time for residents to participate.

- **Bus users** answered 29 questions, including detailed feedback on service quality and travel patterns.
- **Non-bus users** completed 10 questions, including 4 demographic items.

Benchmarking Against National Data

In addition to the Essex-specific survey, the Council compares its findings with national benchmarks provided by **Transport Focus**, which publishes annual reports on bus user satisfaction across the UK. Due to changes in national data collection methods and associated costs, Essex County Council opted to commission its own survey to better reflect the views of local residents.

The most recent Transport Focus results, published in **March 2025**, offer a broader context for understanding how Essex's bus services compare nationally.

2,625 responses were received during the 2025 Essex bus survey, between 2nd June - 30th June 2025



Essex Bus Survey - Overview

The **2025 Essex Bus Survey** was conducted in two parts during June 2025 to gather insights into public perceptions of the local bus network. The survey builds on previous years’ efforts and supports Essex County Council’s ongoing commitment to improving public transport services.

Face-to-Face Surveys

Between **17th and 28th June 2025**, face-to-face interviews were carried out at key locations across Essex:

Primary locations: Basildon, Chelmsford, Colchester, and Harlow.

Additional locations: Basildon Hospital and Billericay Train Station were selected to gather feedback ahead of the planned electrification of Basildon’s bus services.

The face-to-face survey was conducted by **Lake Market Research**, with questions designed to be completed in under 10 minutes. A total of **845 responses** were collected:

- **689 bus users**
- **156 non-bus users**

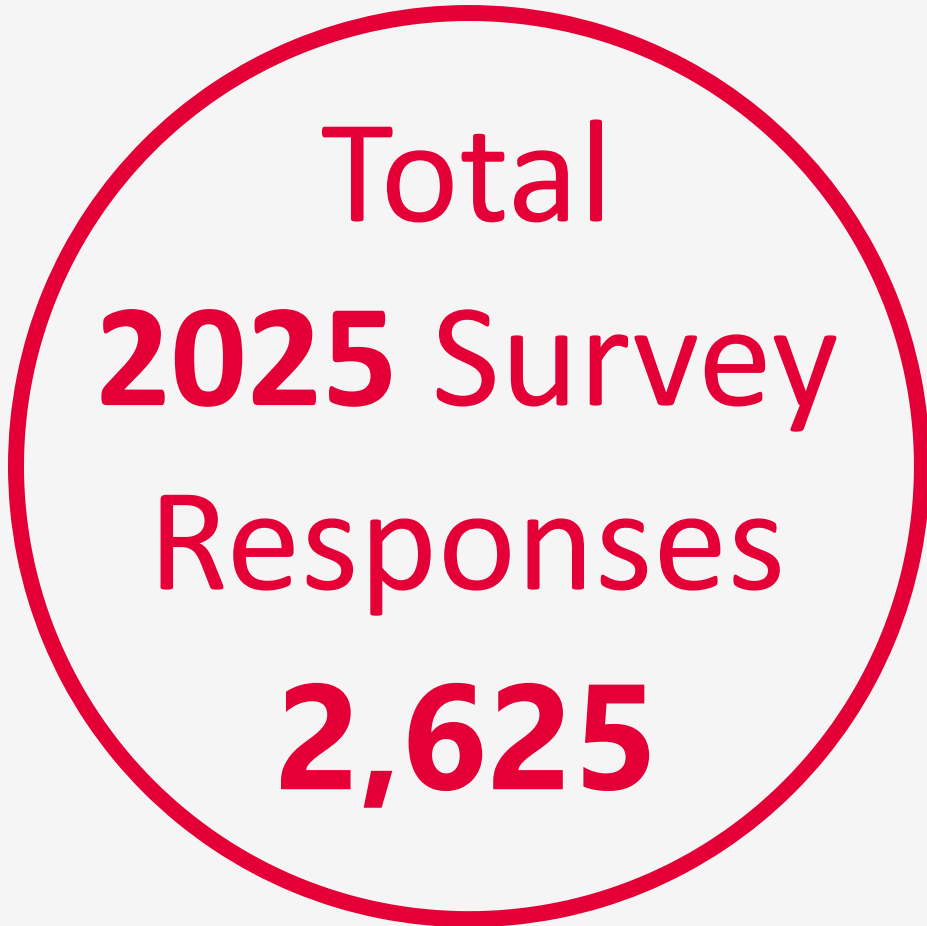
Online Survey

The online survey was launched on Citizen Space on **2nd June** and ran through to **31st June 2025**, extended from previous years in response to participant feedback. The online format allowed for more detailed questions, particularly around service quality and travel behaviour. A total of **1,780 responses** were received:

- **1,522 bus users**
- **258 non-bus users**

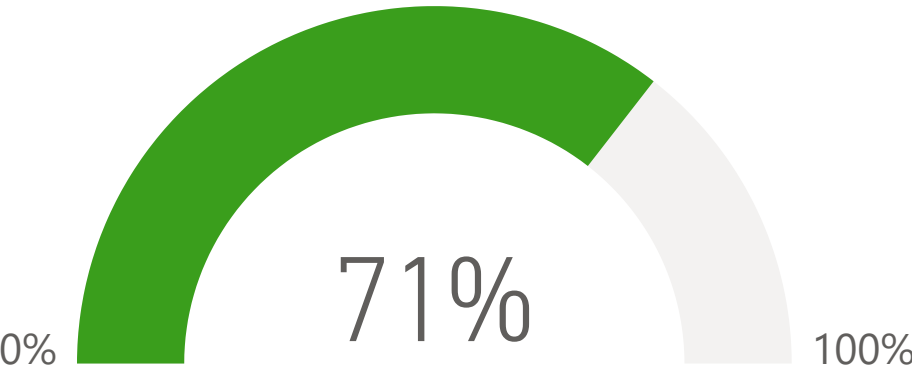
Total Participation

In total, **2,625 responses** were received for the 2025 Essex Bus User Survey, providing a robust dataset for understanding both user and non-user perspectives on bus services across the county.

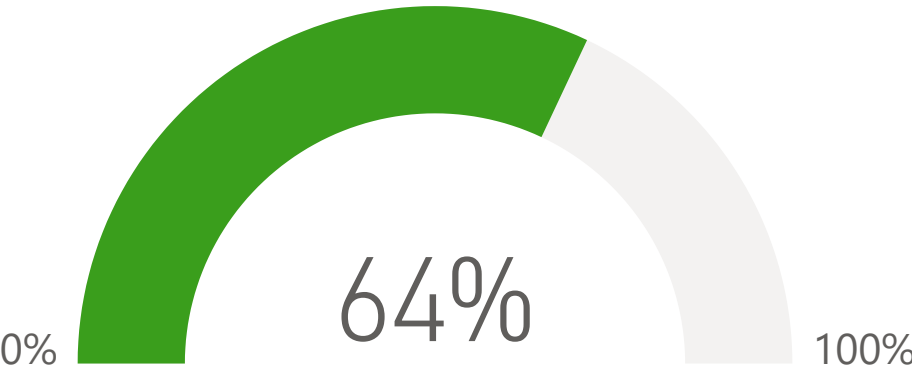


Essex Bus Survey Headline Satisfaction Results 2025

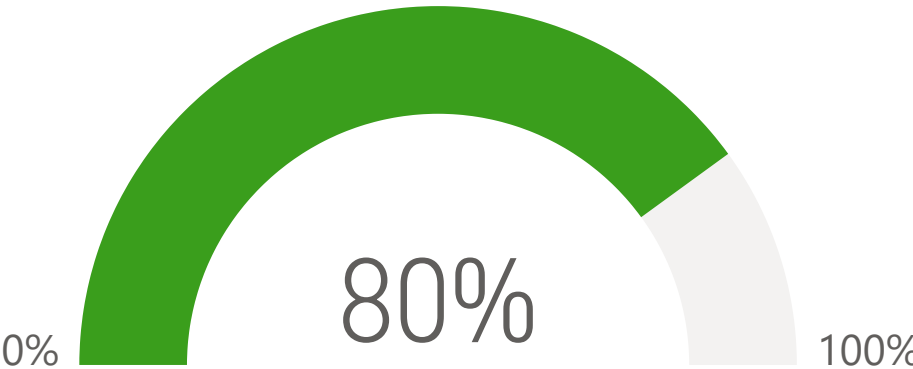
2025 Overall Satisfaction



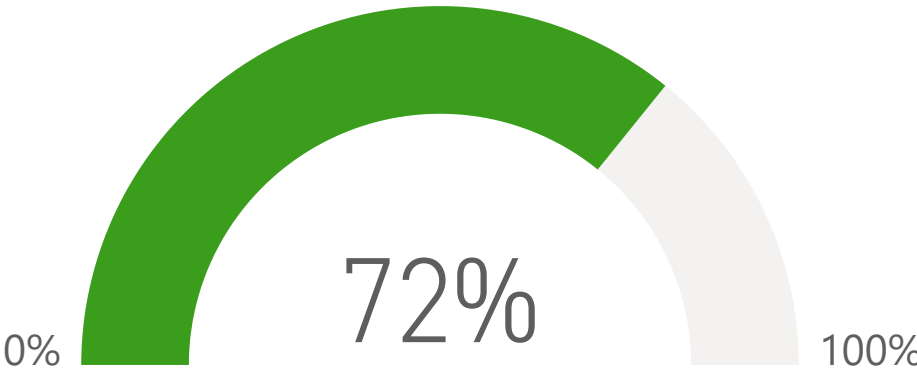
2025 Punctuality Satisfaction



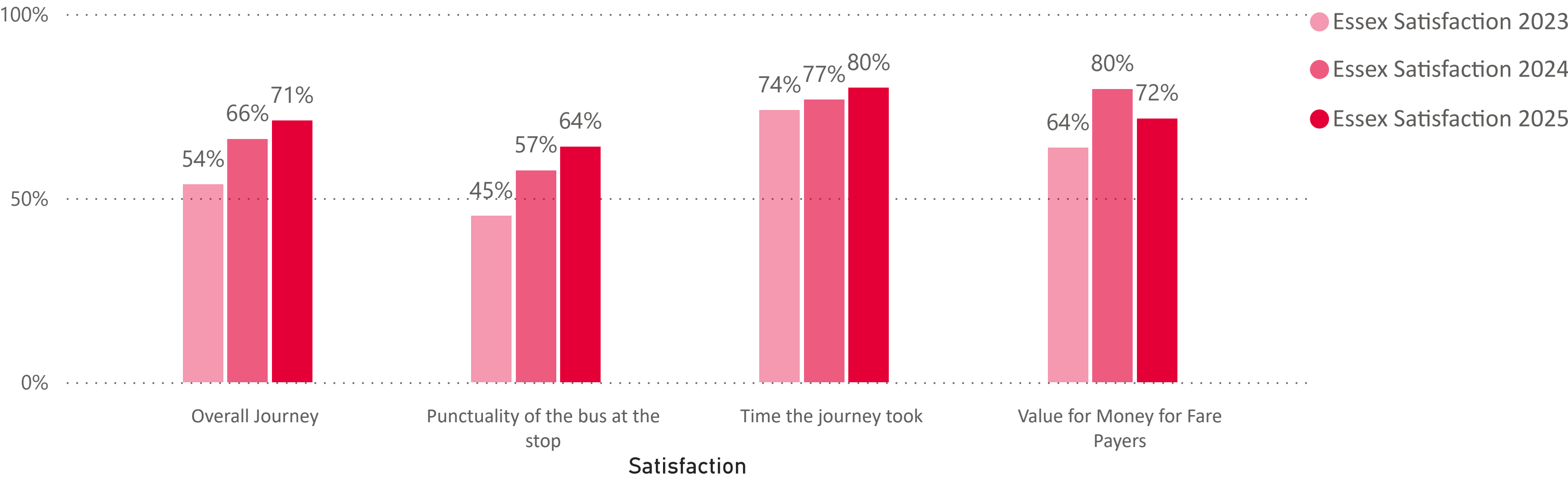
2025 Journey Time Satisfaction



2025 Value for Money Satisfaction



Essex Bus Satisfaction Survey Results - 2023-2025



5% Increase
Essex Overall
Journey
Satisfaction
2024-25

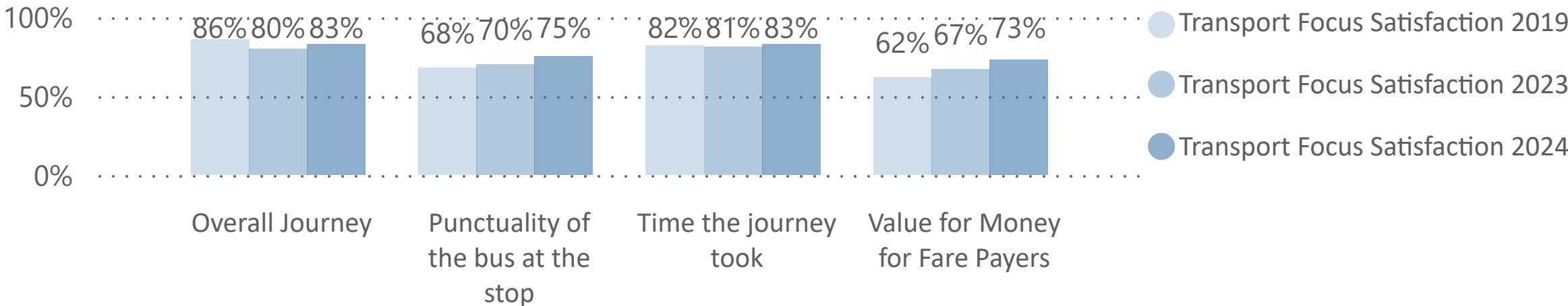
3% Increase
Essex Journey
time Satisfaction
2024-25

7% Increase
Essex Punctuality
Satisfaction
2024-25

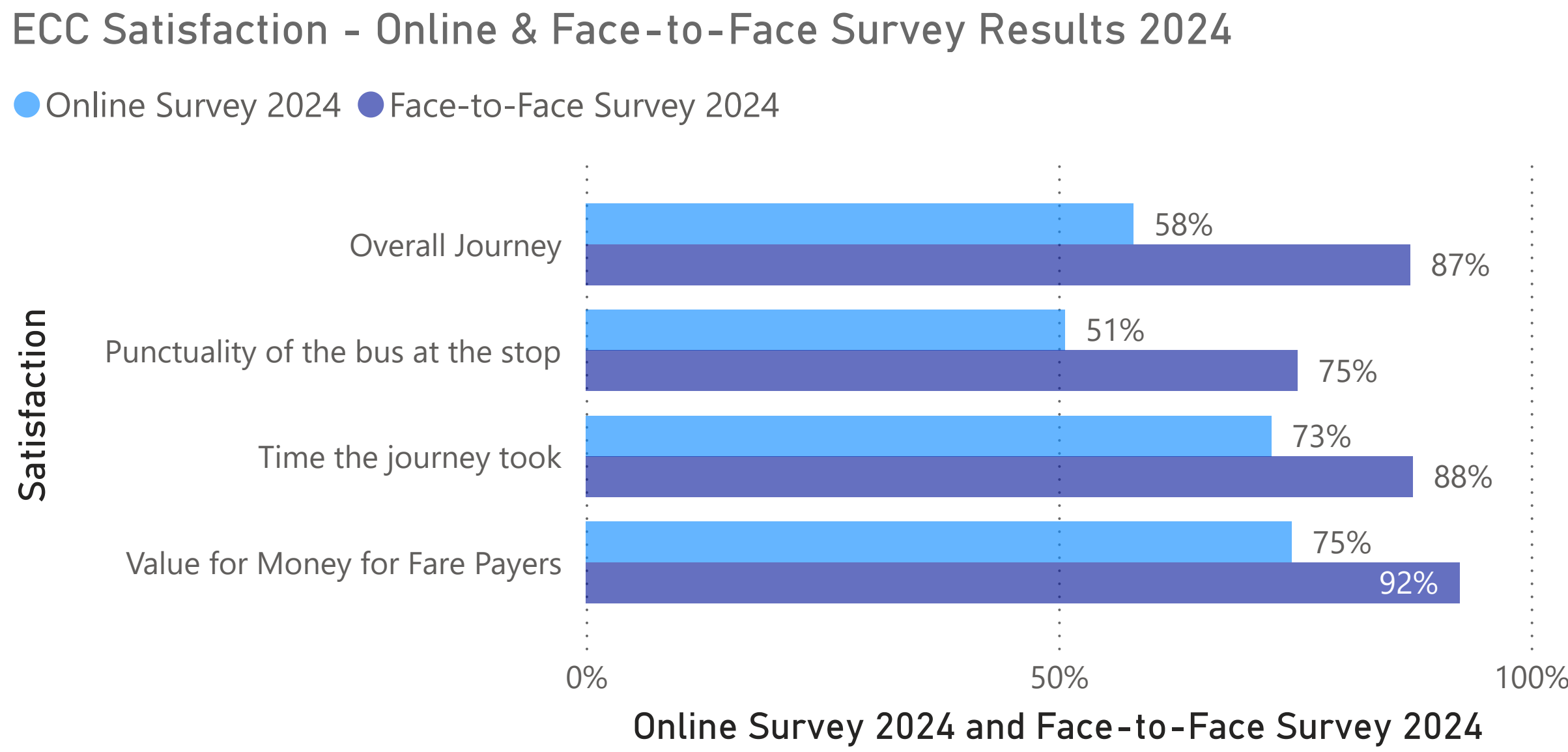
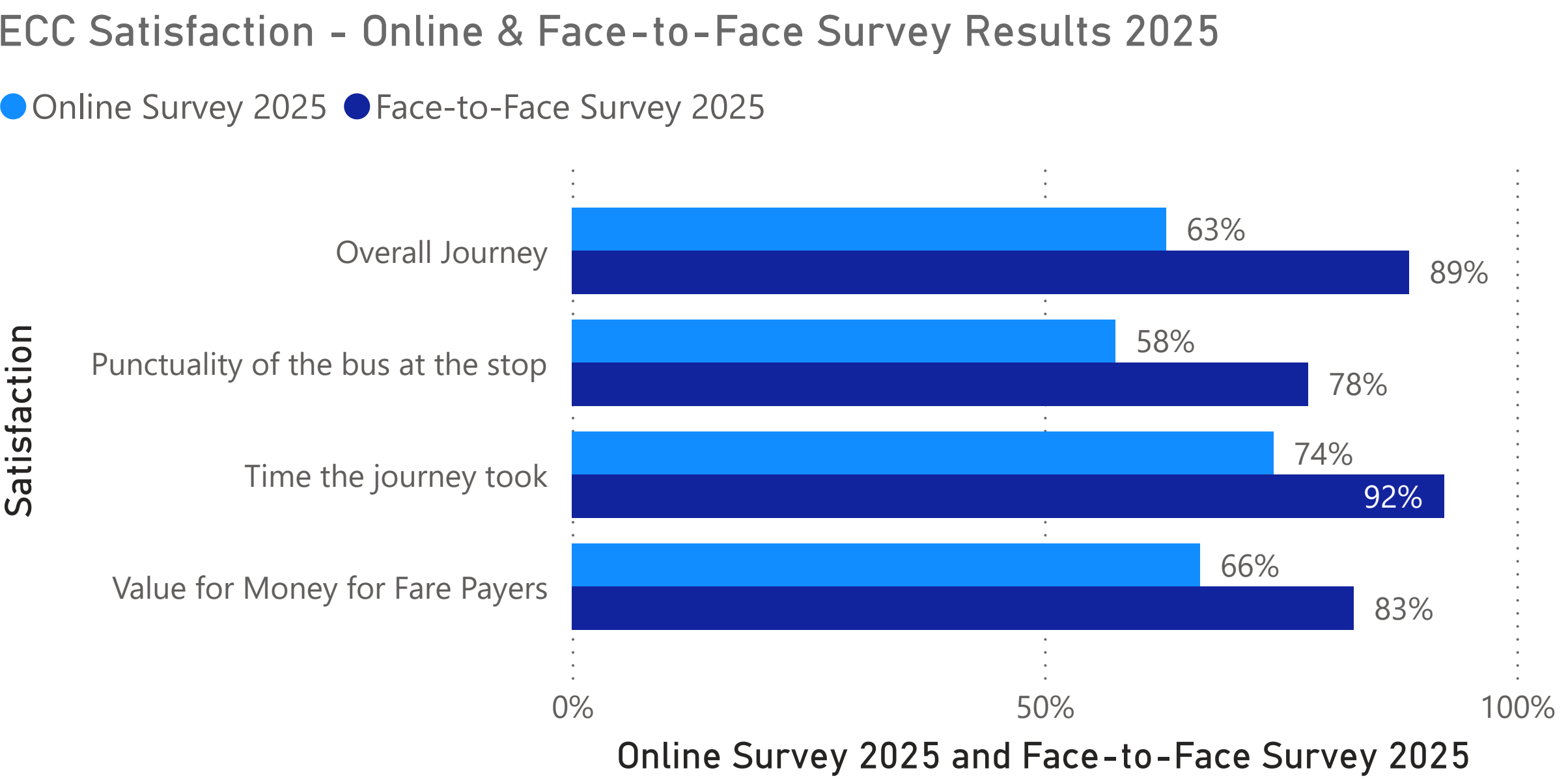
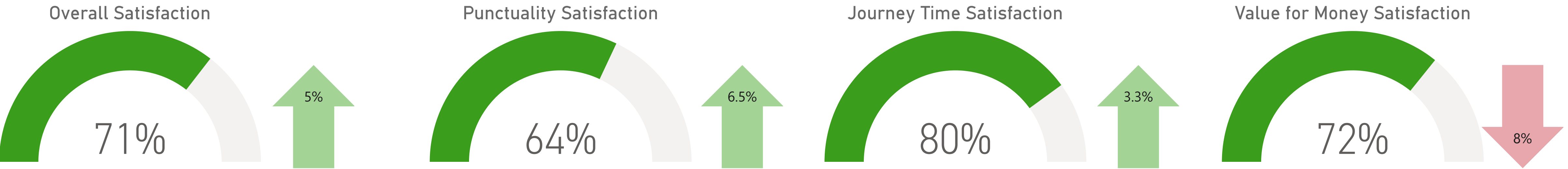
Total Responses
2,625

Bus Users - 2,211
Non-Bus Users - 414

Transport Focus Bus Satisfaction Survey Results - 2019 & 2023-2024

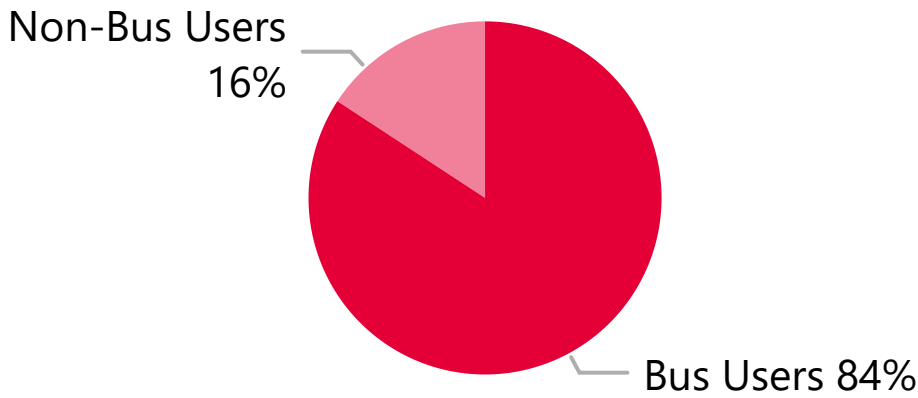


Essex Bus Survey Satisfaction 2025 - Online & Face-to-face Results

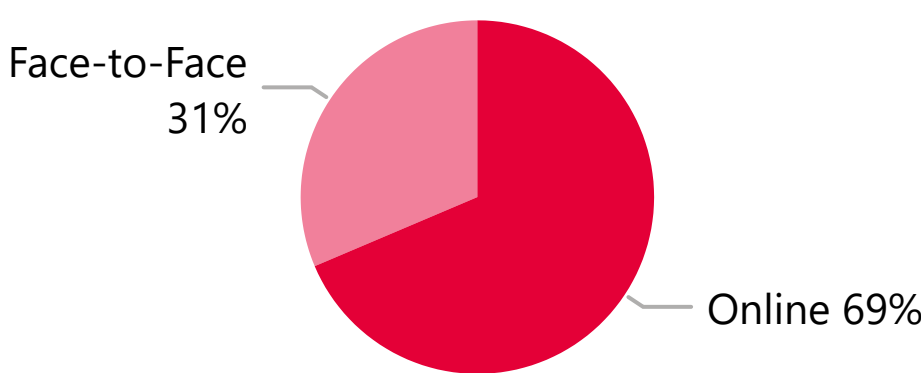


District Responses

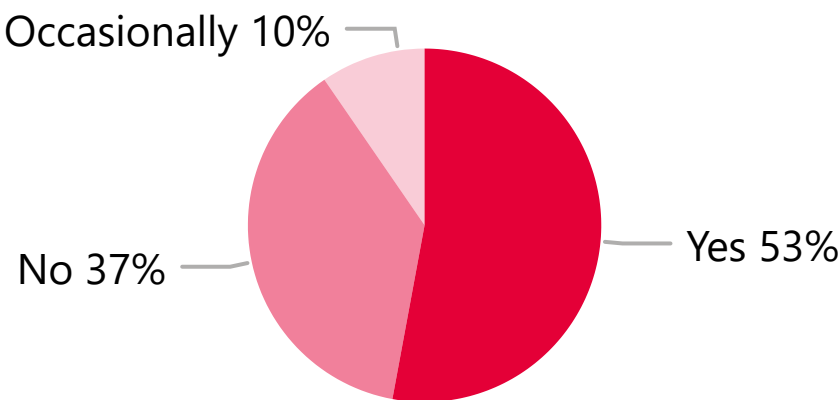
Bus Users



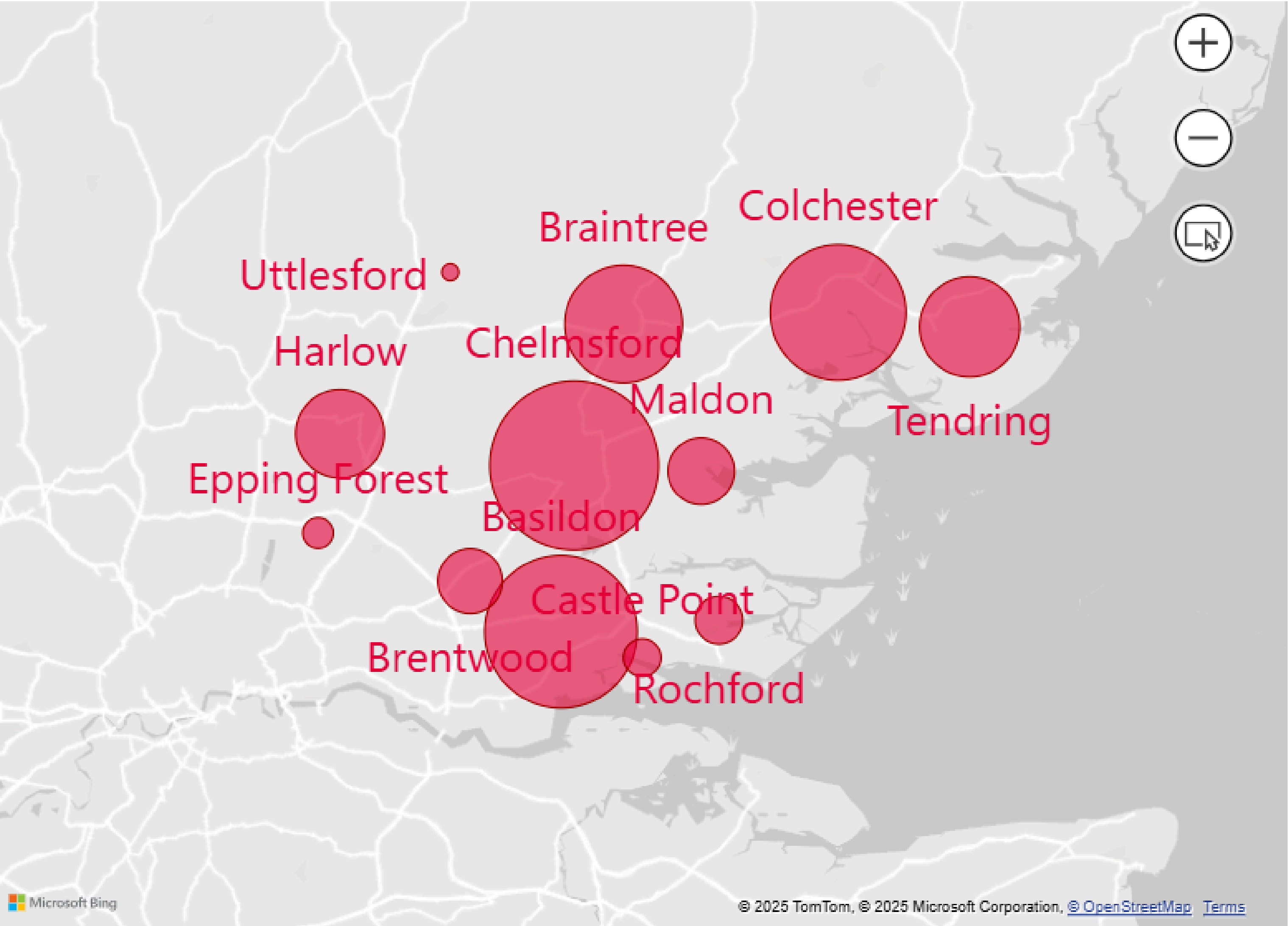
Survey Type



Access to a Car?



2625
Responses



Bus Journey Satisfaction

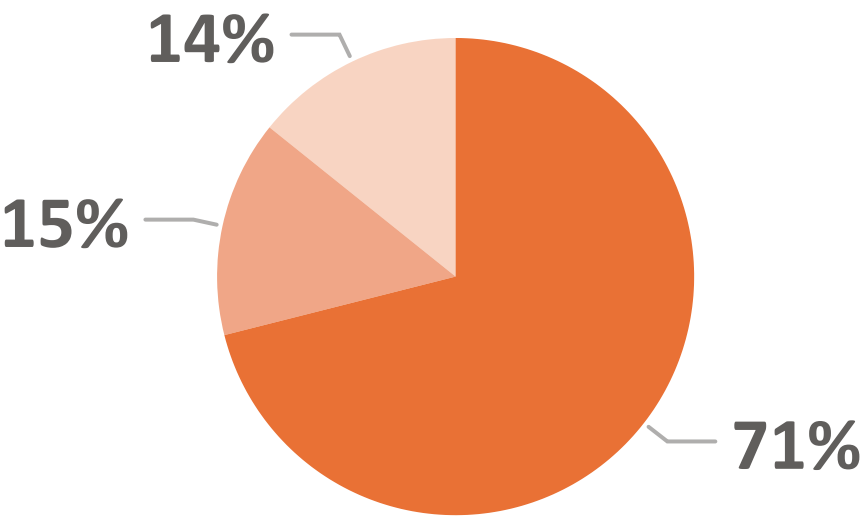
1801

Online Survey Responses 2025

824

Face-to-Face Survey Responses 2025

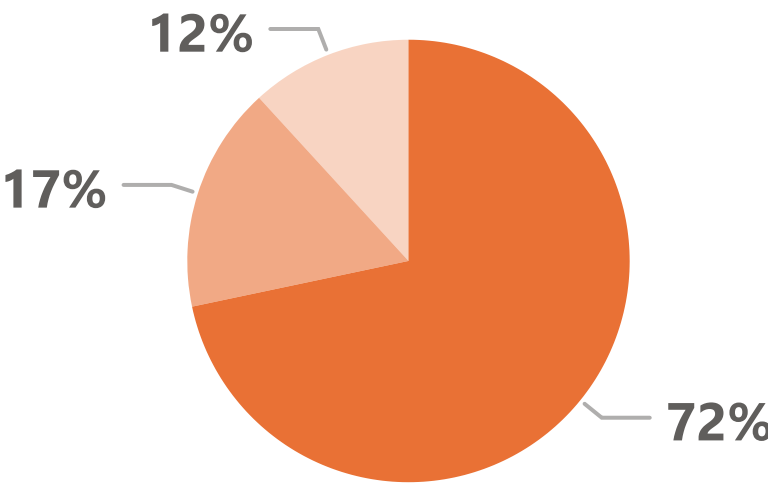
Overall Journey Satisfaction



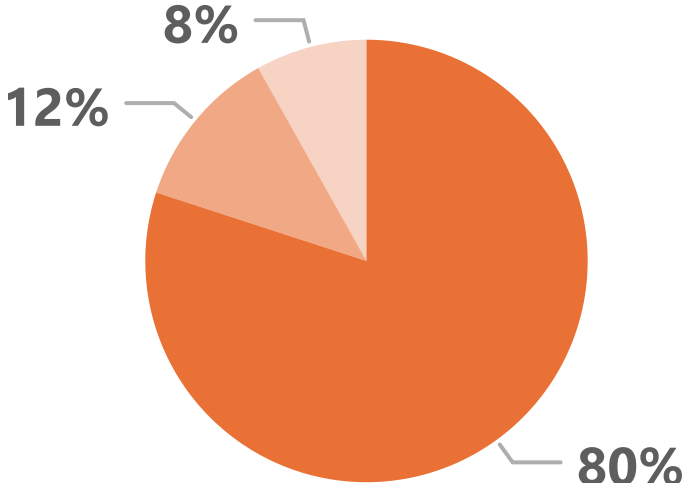
Satisfaction - Overall Journey

- Very Satisfied & Satisfied
- Neither Satisfied nor Dissatisfied
- Very Dissatisfied & Dissatisfied

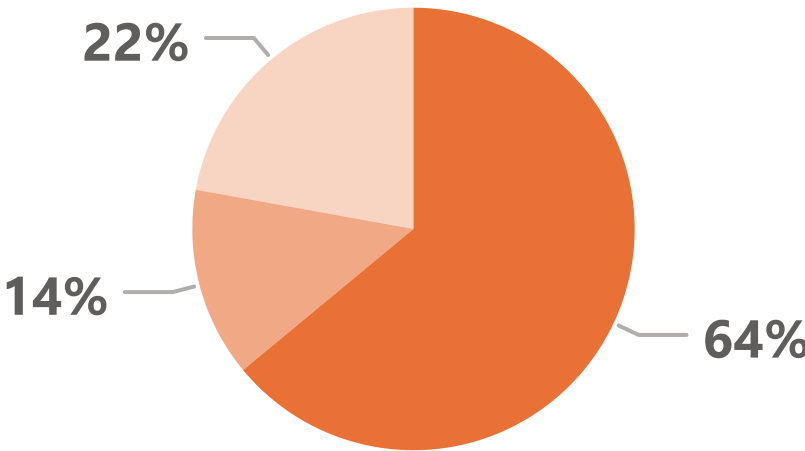
Value of Money



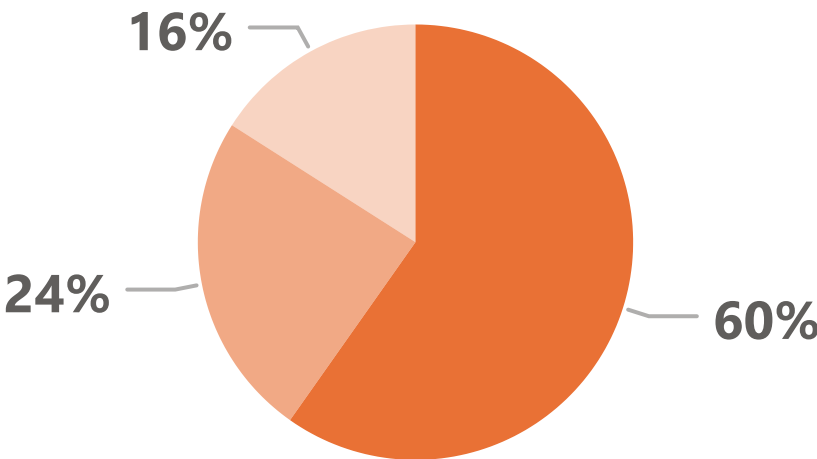
Journey Time



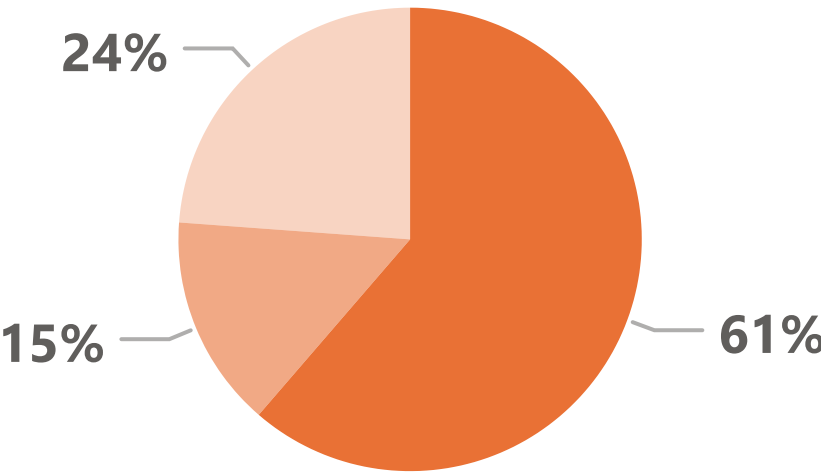
Punctuality



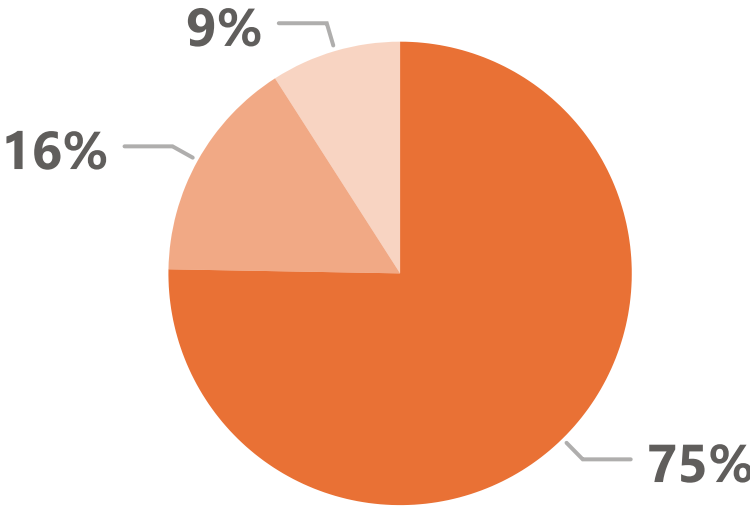
Bus Cleanliness



Waiting Time for the bus



Bus Capacity

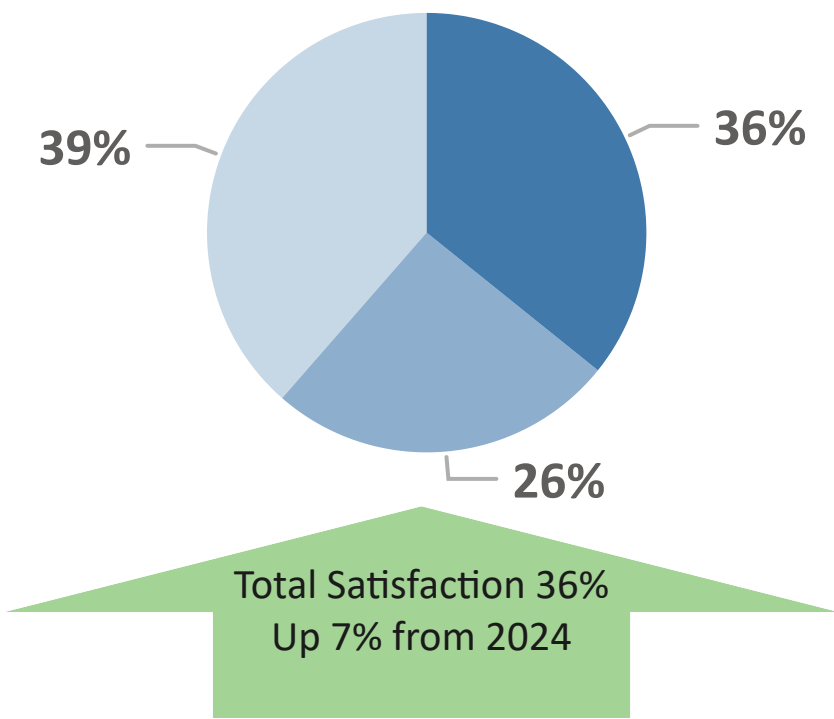


Total of 2,625 Responses received

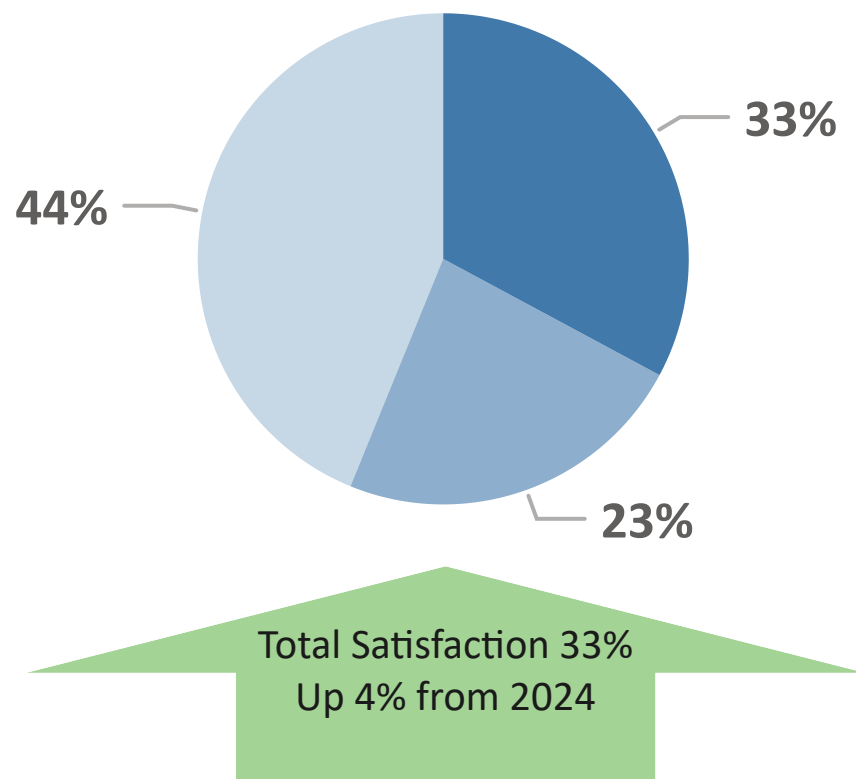
Bus Users 2,211 (84%)
Non-Bus Users 414 (16%)

Local Bus Service Rating

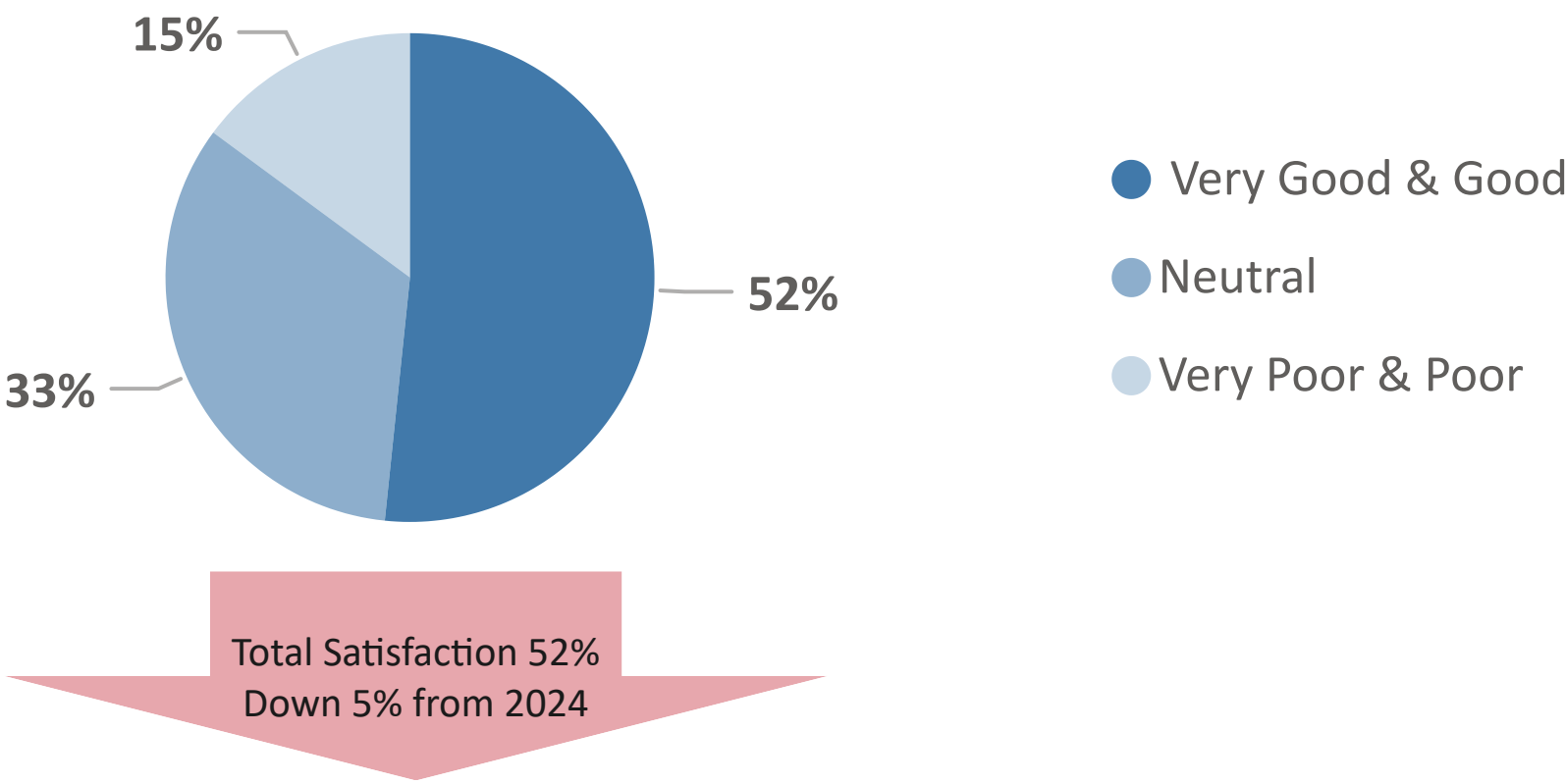
Rating of local bus services - Reliability of services in your area



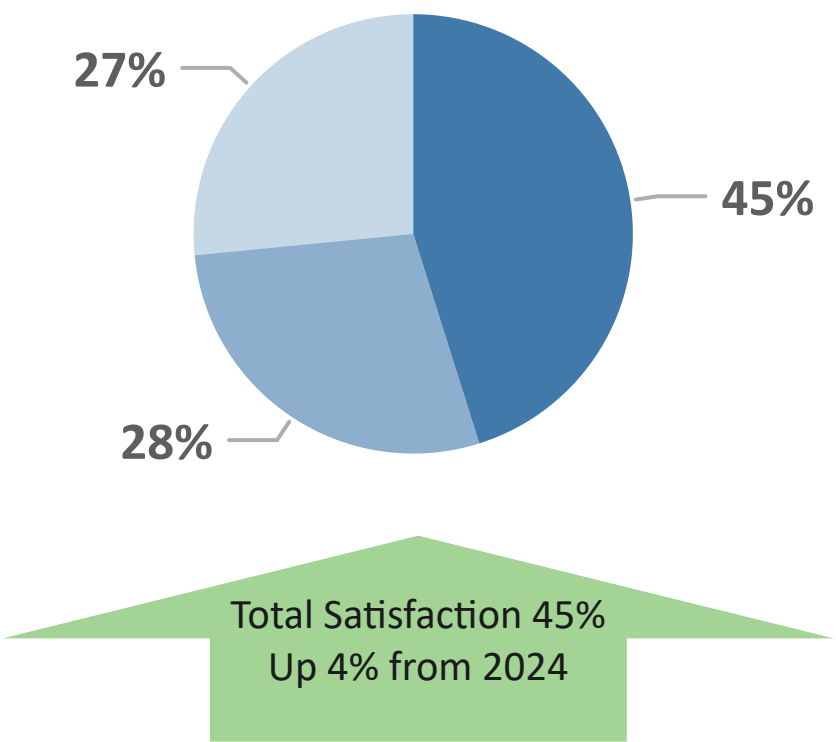
Frequency of Services in your area



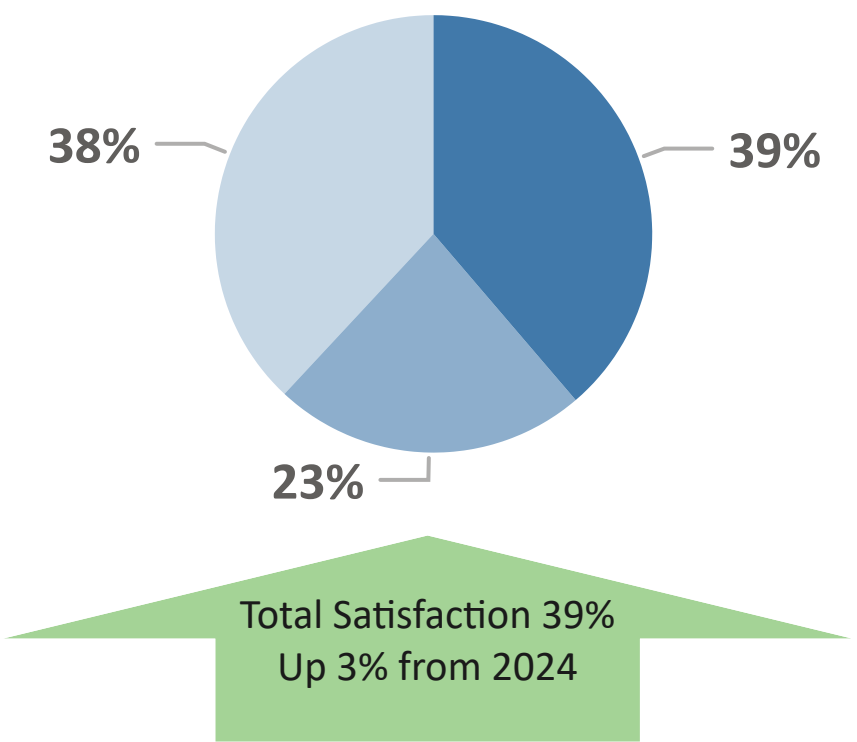
Affordability of services in your area



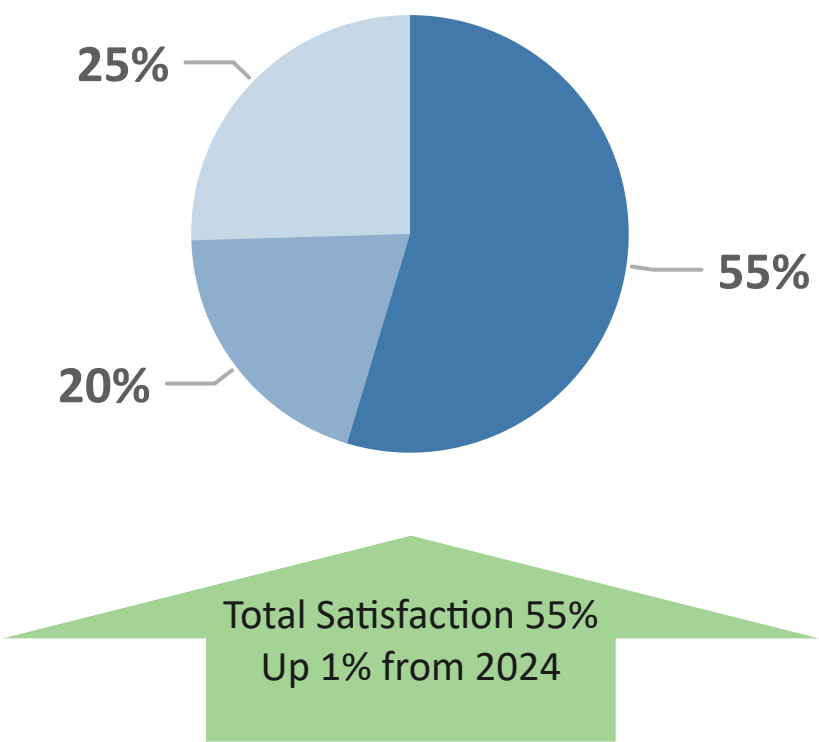
Connections with other transport (trains/other busses)



Ease of getting to hospitals and health related appointments



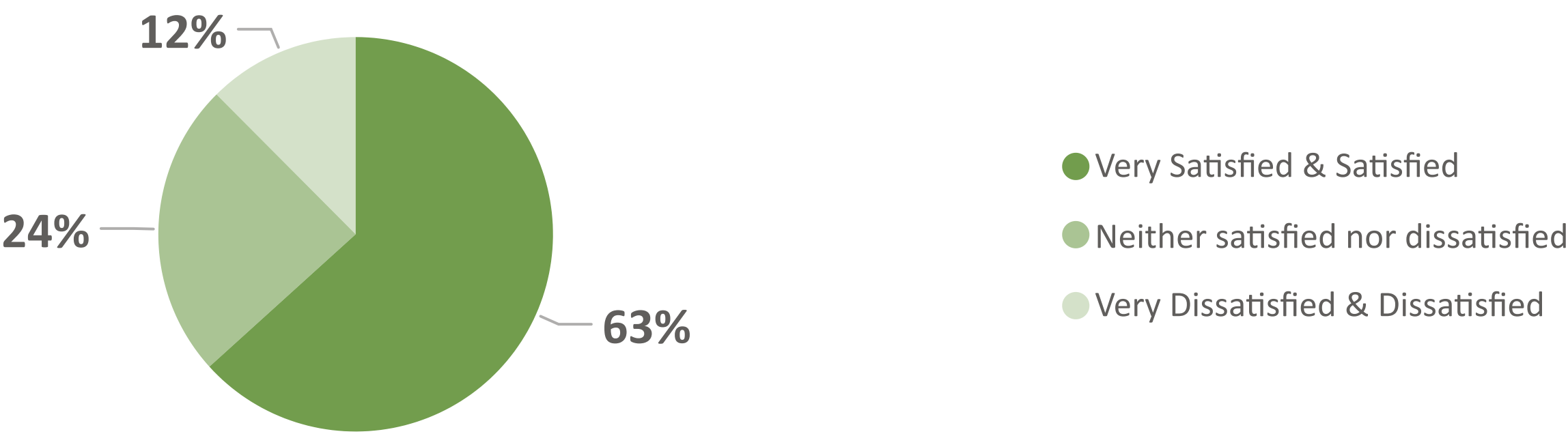
Ease of getting to local amenities (shops/leisure centres)



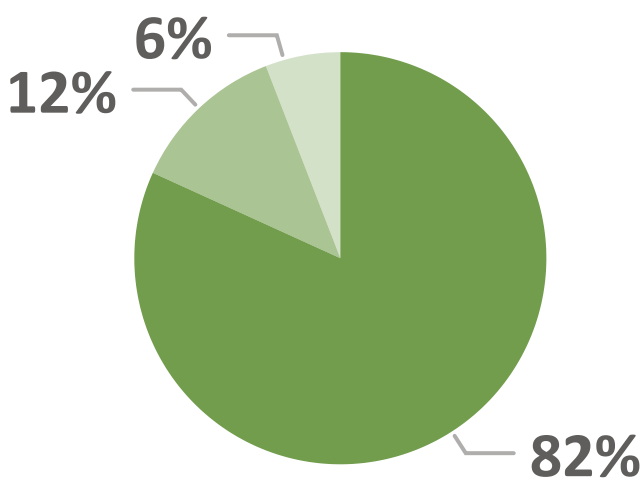
Satisfaction at the Bus Stop

Bus stop satisfaction is on the rise! In **2025**, **overall satisfaction** increased to **63%** (56% in 2023 - 60% in 2024), with notable improvements in convenience (up 4%), cleanliness (up 4%), and personal safety (up 6%). These positive trends reflect ongoing efforts to enhance the passenger experience at bus stops

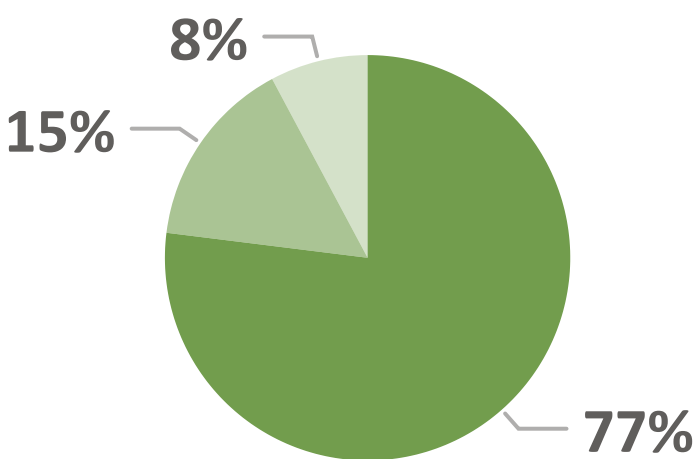
Overall satisfaction with the bus stop



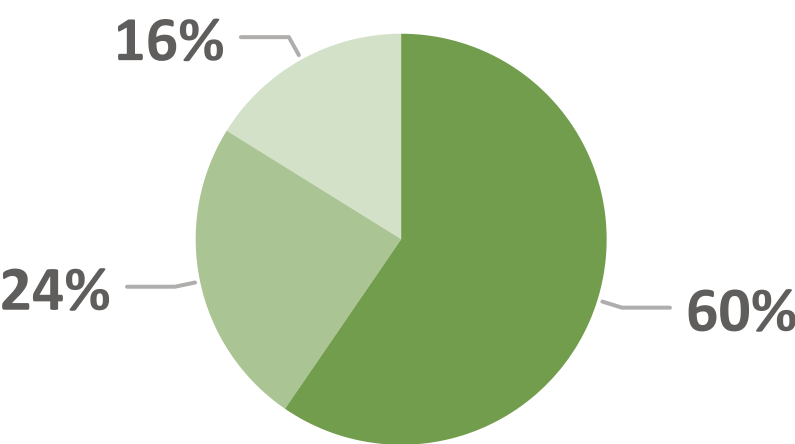
Bus Stop Convenience/accessibility of location on the road



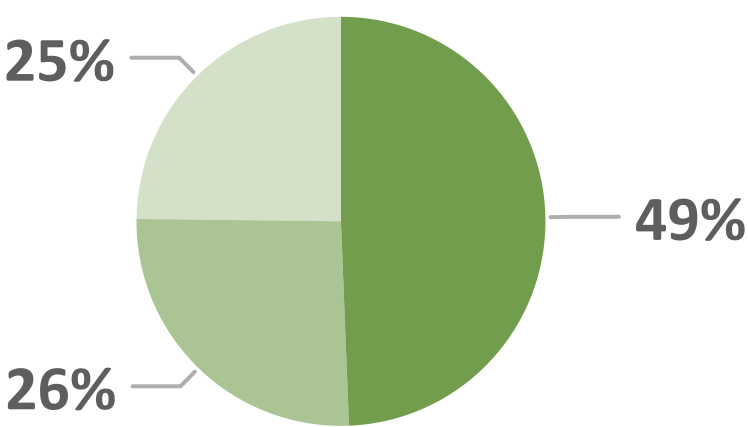
Distance of stop from start of your journey



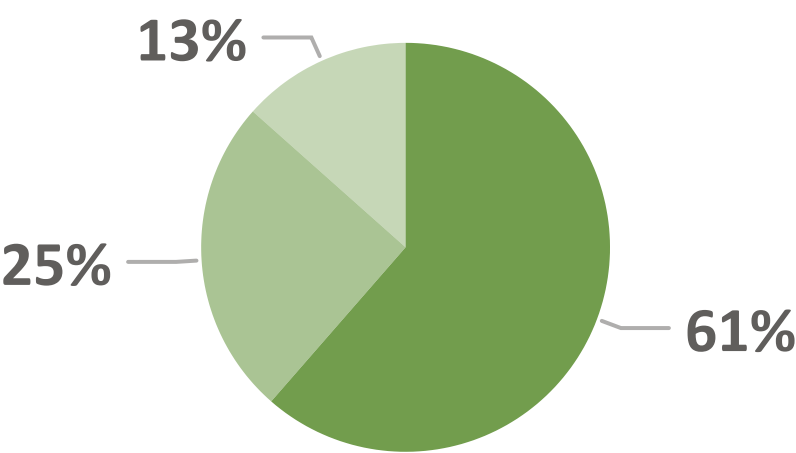
Cleanliness from litter/vandalism by Bus Stop -
Cleanliness from litter / vandalism



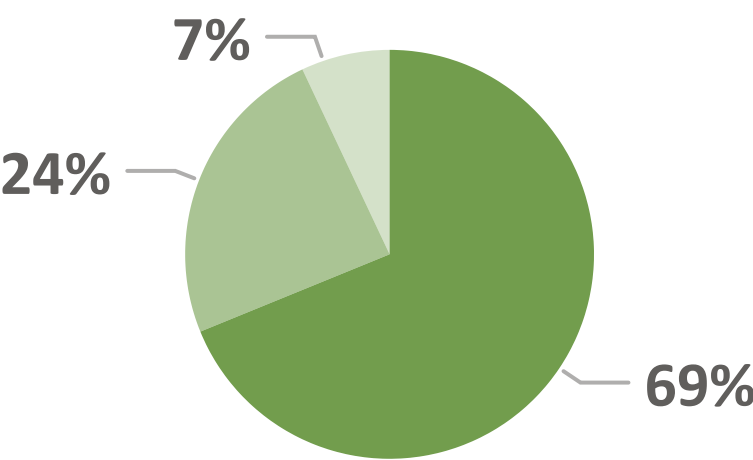
Information available at the stop



General condition and Standard of Maintenance

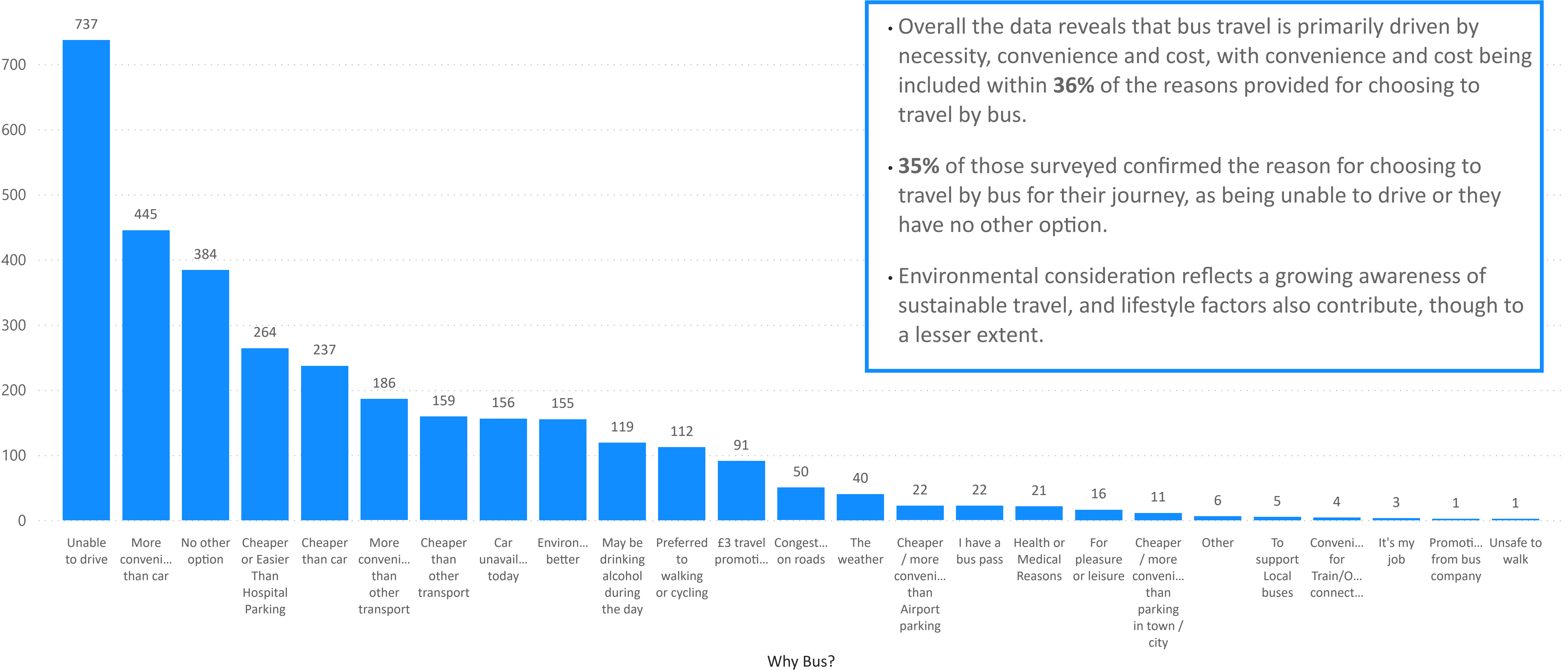


Personal safety while at the stop



Journey Information - Why Bus

Bus Users - Why Did you travel by bus for your journey?

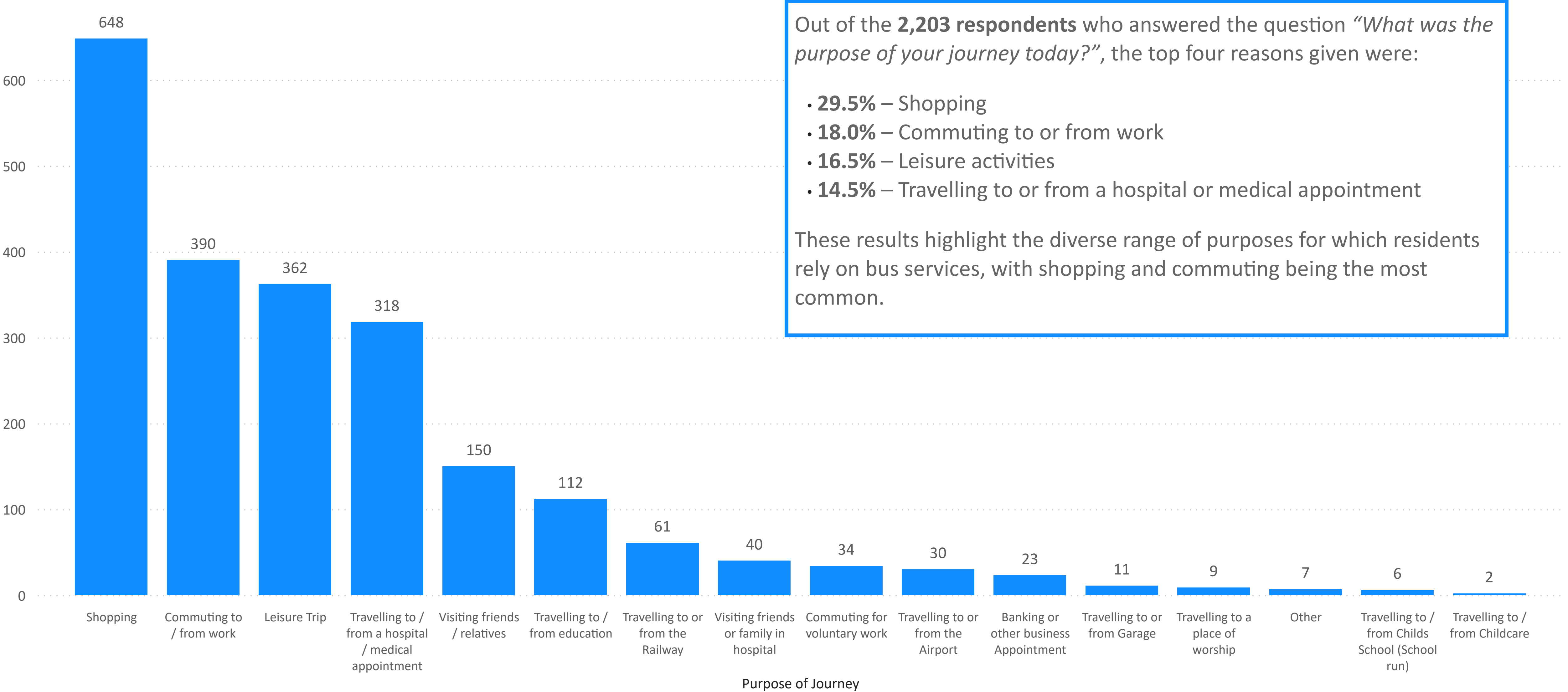


- Overall the data reveals that bus travel is primarily driven by necessity, convenience and cost, with convenience and cost being included within **36%** of the reasons provided for choosing to travel by bus.
- **35%** of those surveyed confirmed the reason for choosing to travel by bus for their journey, as being unable to drive or they have no other option.
- Environmental consideration reflects a growing awareness of sustainable travel, and lifestyle factors also contribute, though to a lesser extent.

Multiple options were available for each respondent.

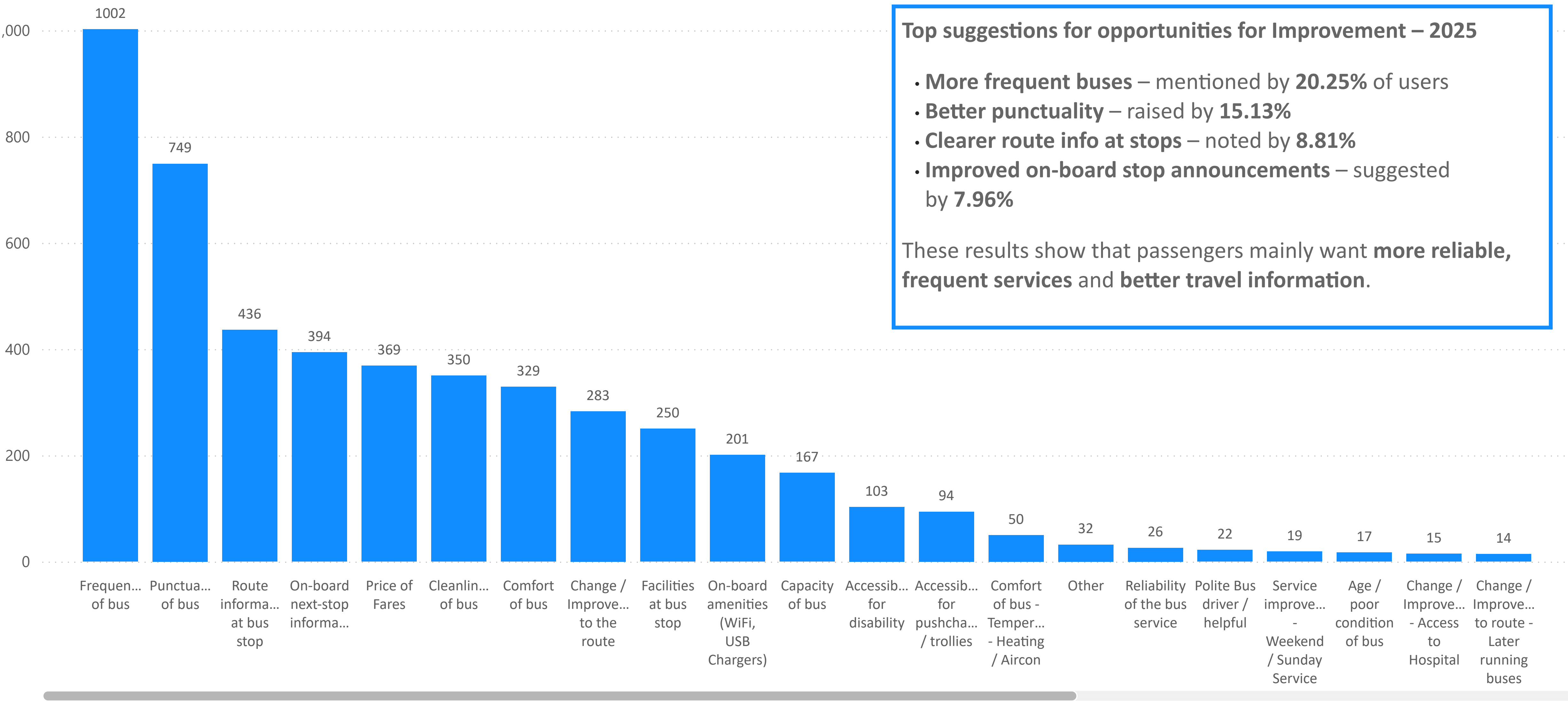
Journey Information - Purpose of your Journey

Bus Users - What was the Purpose of your latest journey?



Journey Information - Opportunities for Improvements

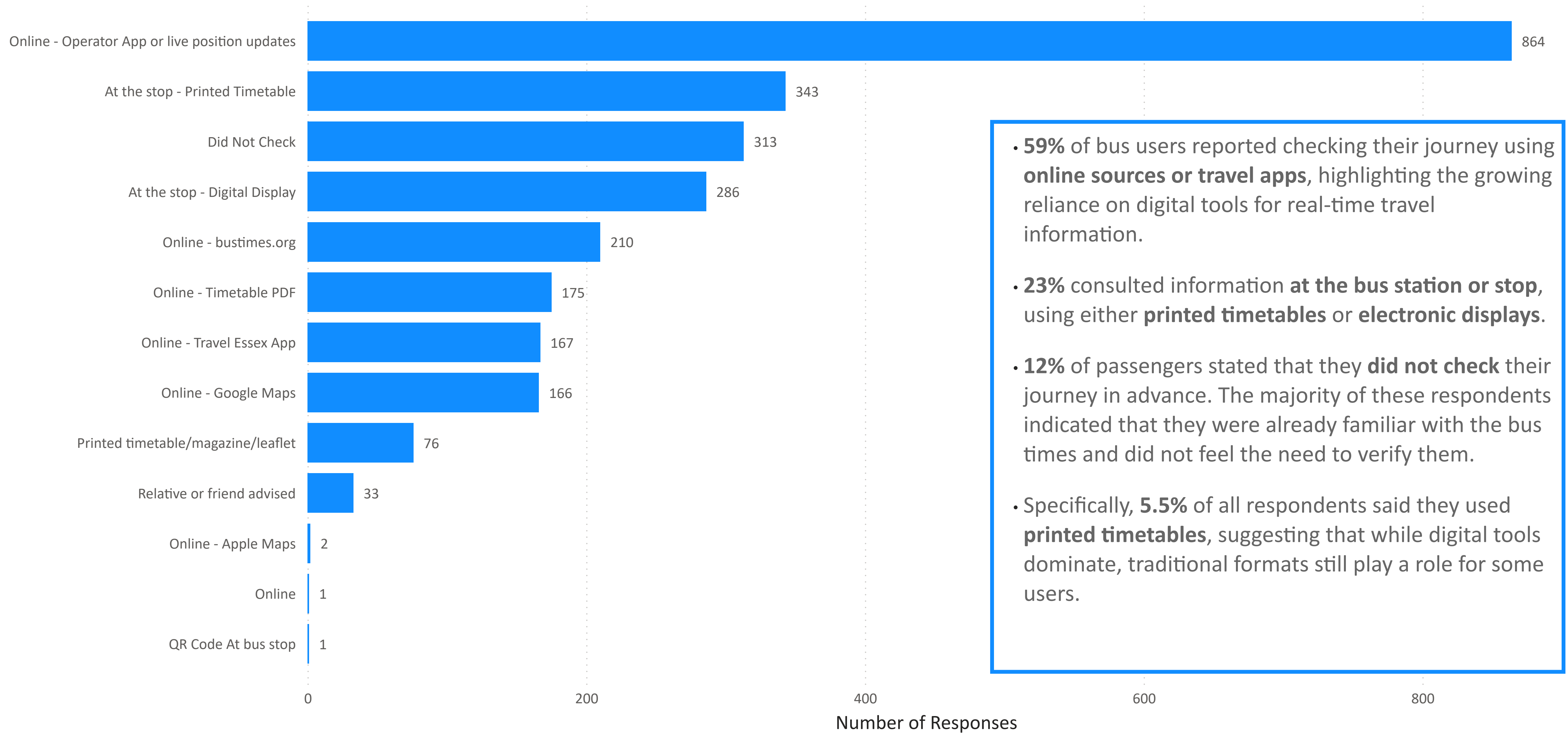
Bus Users - If something could be improved on your journey what would it be?



Multiple options were available for each respondent.

Journey Information - Journey Planning

Journey Planning - How did you check the bus times / plan your last bus journey?

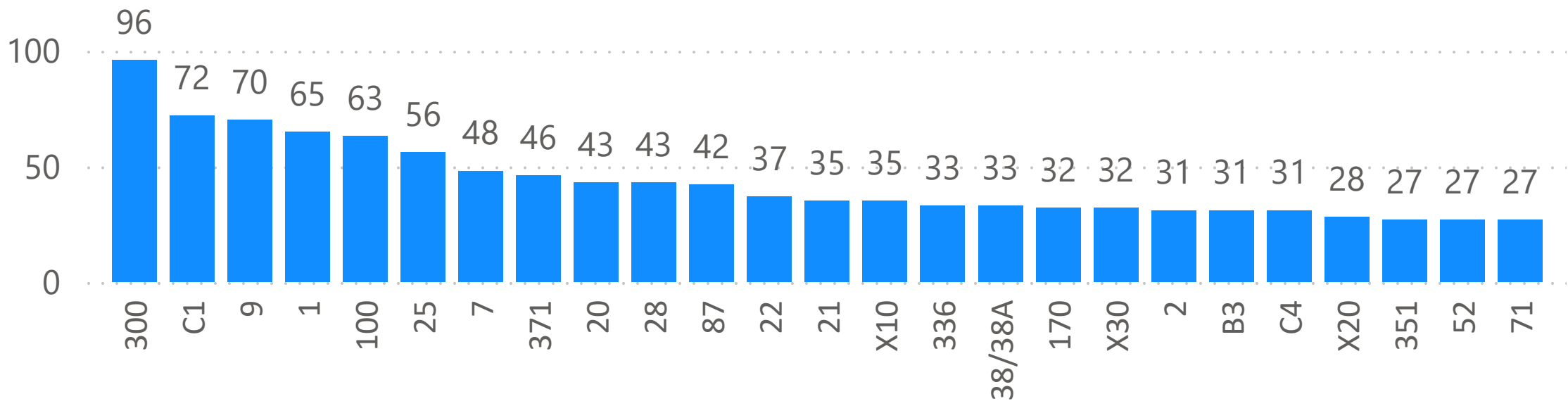


Journey Information - Usage Frequency, Bus Service Details & Ticket Types

• **40%** of responses confirmed travelling Monday - Friday off peak and **29%** Monday - Friday peak time.

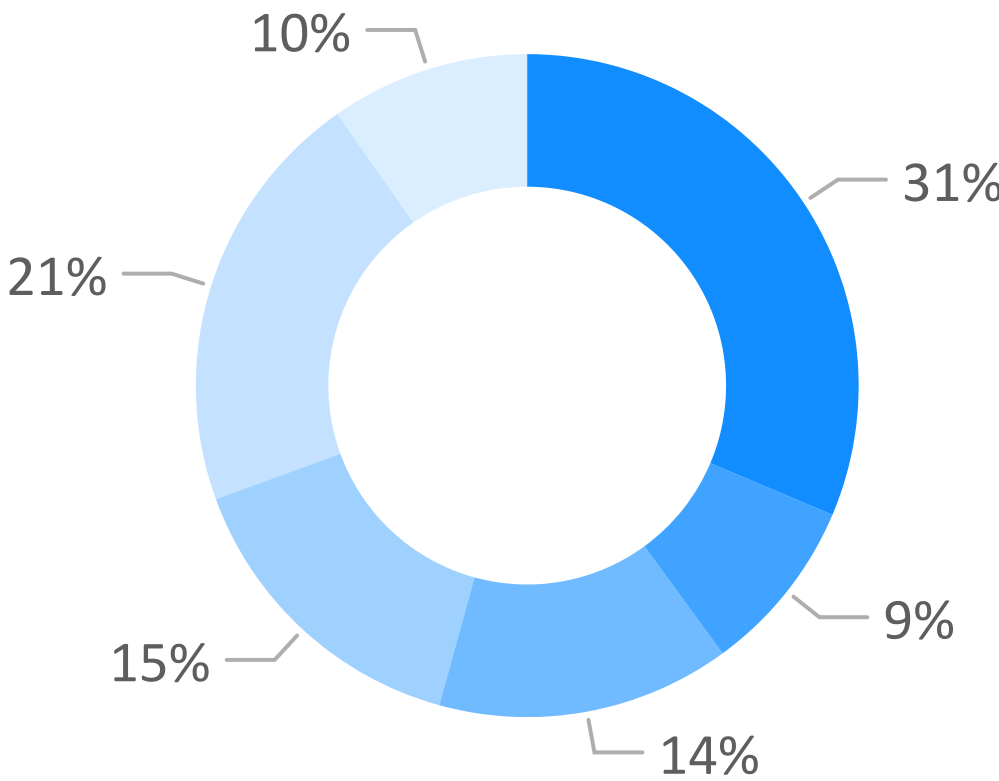
• Response for Off peak travel Monday - Friday just shows just over **21%** of these were using **concessionary pass** tickets.

Route No



Route Number

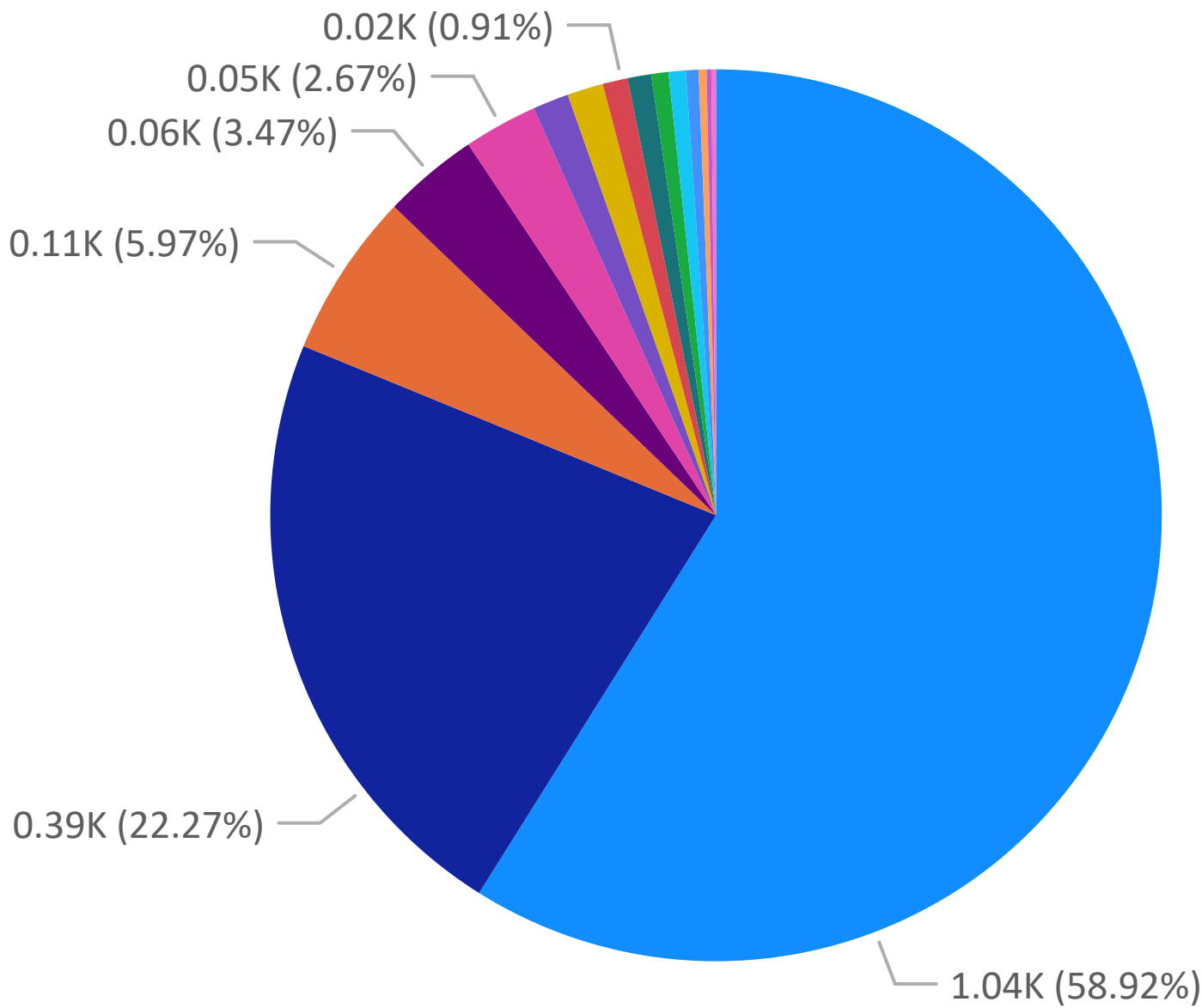
What time of the day do you usually use the bus?



Journey Info -Time of Travel (groups)

- Monday-Friday - Off Peak (09:30 - 15:30)
- Monday-Friday - Off Peak (18:30 - 07:00)
- Monday-Friday - Peak (07:00-09:30)
- Monday-Friday - Peak (15:30-18:30)
- Saturday
- Sunday

Bus Journey - What type of ticket did you use for your latest bus journey?

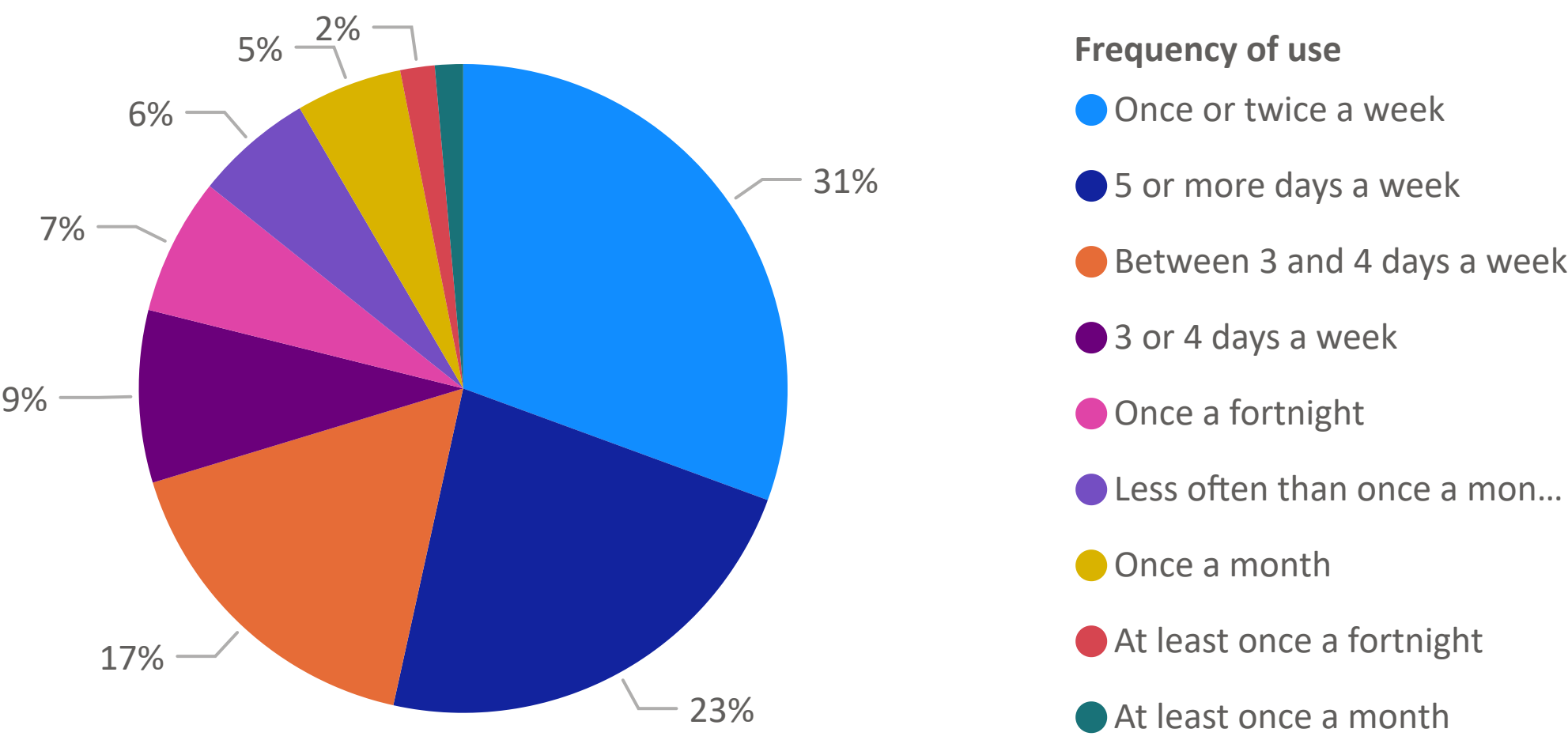


Ticket Type

- Concessionary Pass
- Single Journey Ticket
- Return Journey Ticket
- Other
- Tap&Cap (only in Basildon, Chelms...)
- Day Ticket (single-operator)
- Monthly Ticket
- Weekly Ticket
- Retired staff pass
- Essex Saver (multi-operator day tic...)
- Student Ticket
- Annual Ticket
- Family day ticket
- Airport Travel Pass
- NHS Travel pass

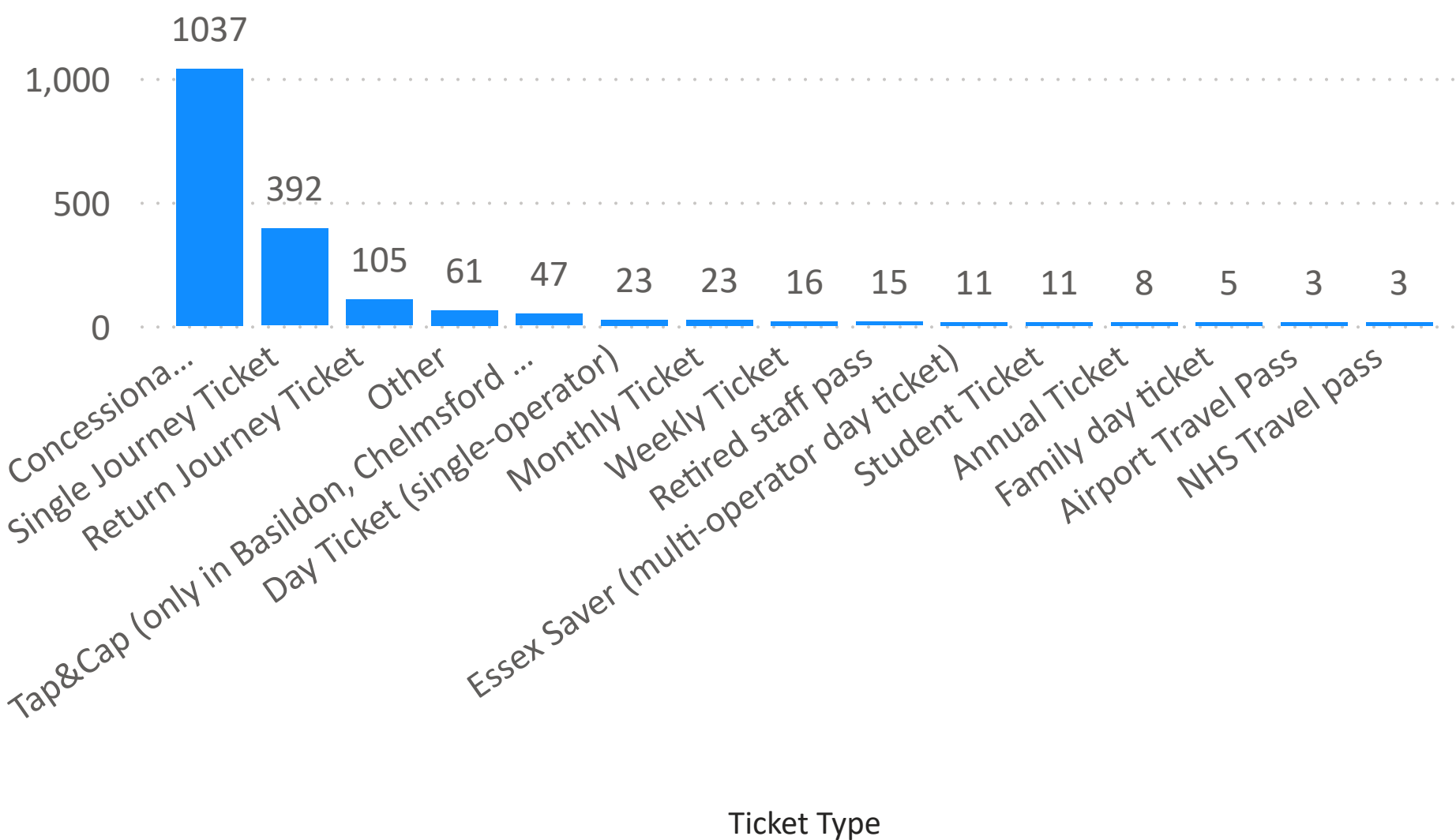
Journey Information - Usage Frequency & Ticket Types

Journey Info - Frequency of use

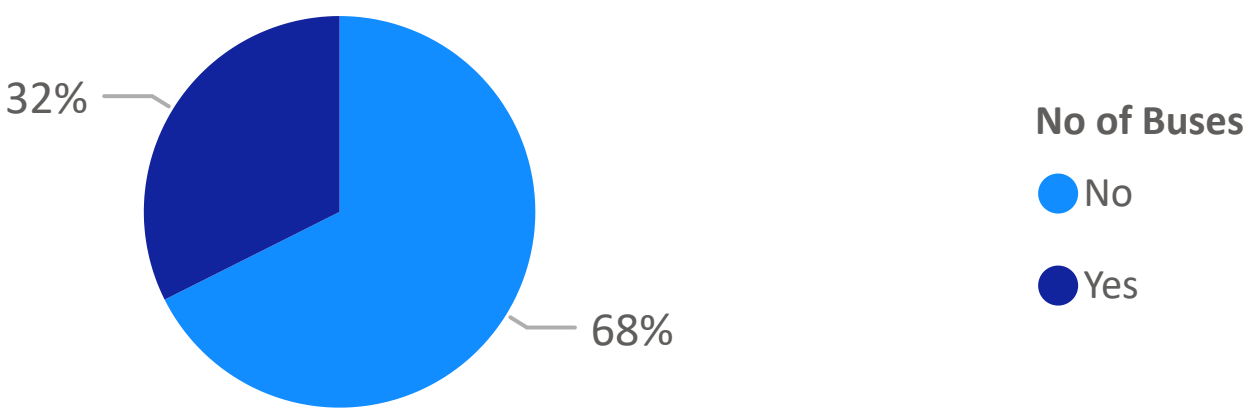


- A significant **81%** of bus users reported using bus services more than once or twice per week, indicating regular and frequent reliance on public transport for their travel needs.
- Among all respondents, **59%** indicated that they typically travel using a Concessionary Pass, highlighting the importance of accessible and subsidised travel options for eligible groups such as older adults and individuals with disabilities.

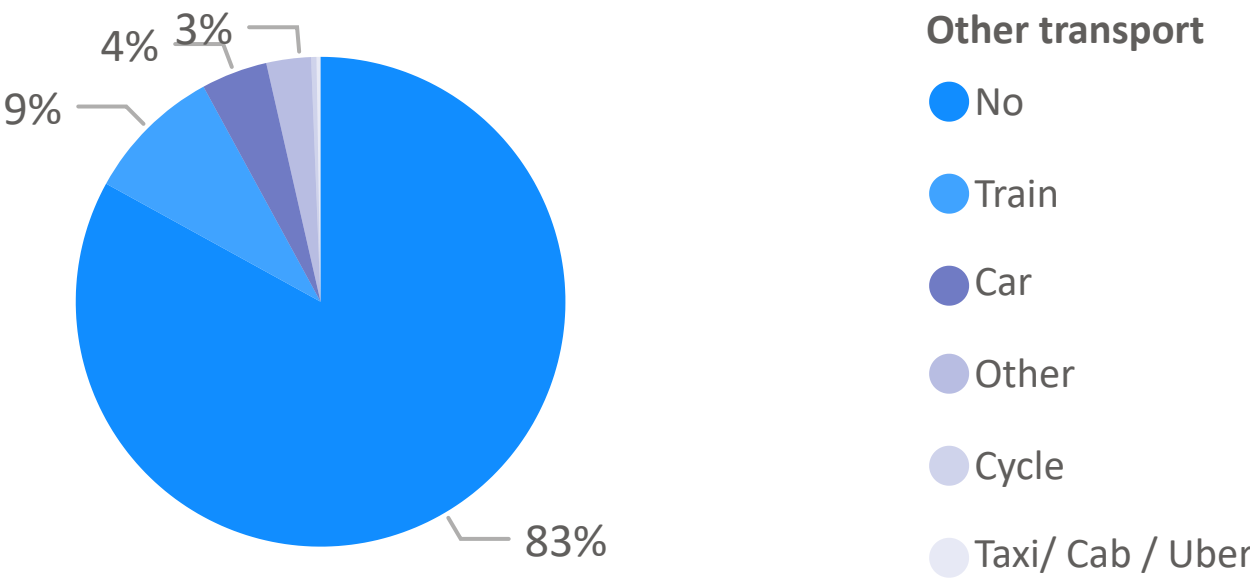
Bus Journey - What type of ticket did you use for your latest bus journey?



Did you use more than 1 bus for your latest journey?



Bus Journey - Did you use any other transport as part of your journey?

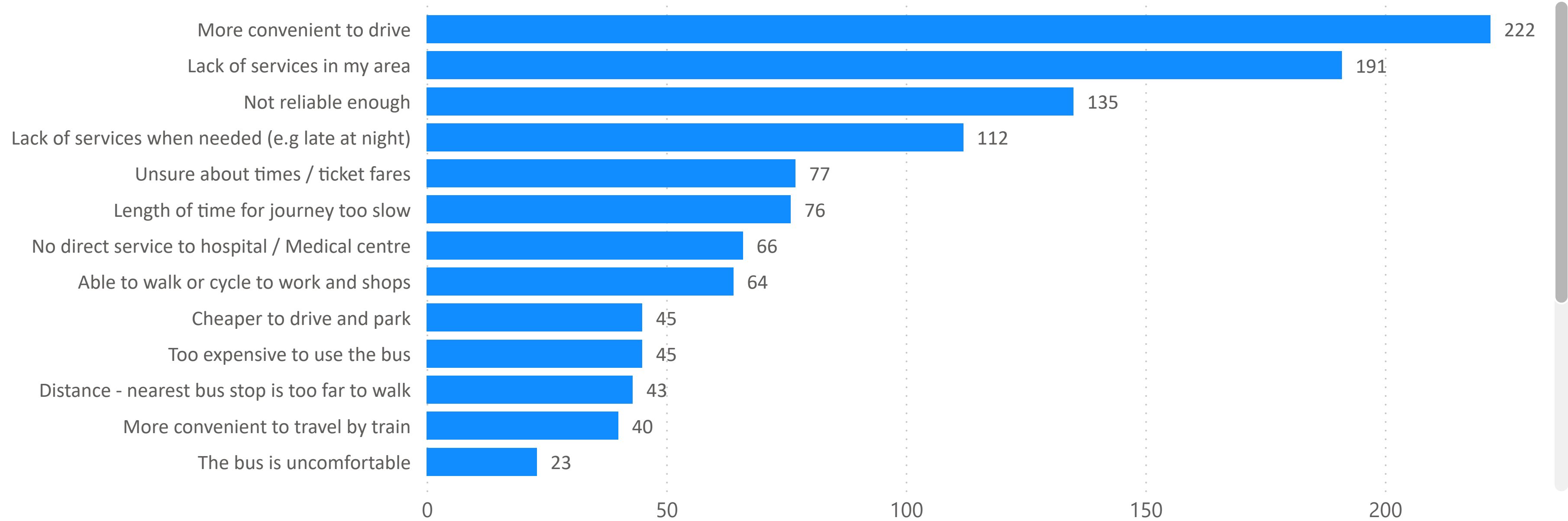


Non-Bus Users - Why Not Use the Bus and Suggestions to Encourage Bus Use

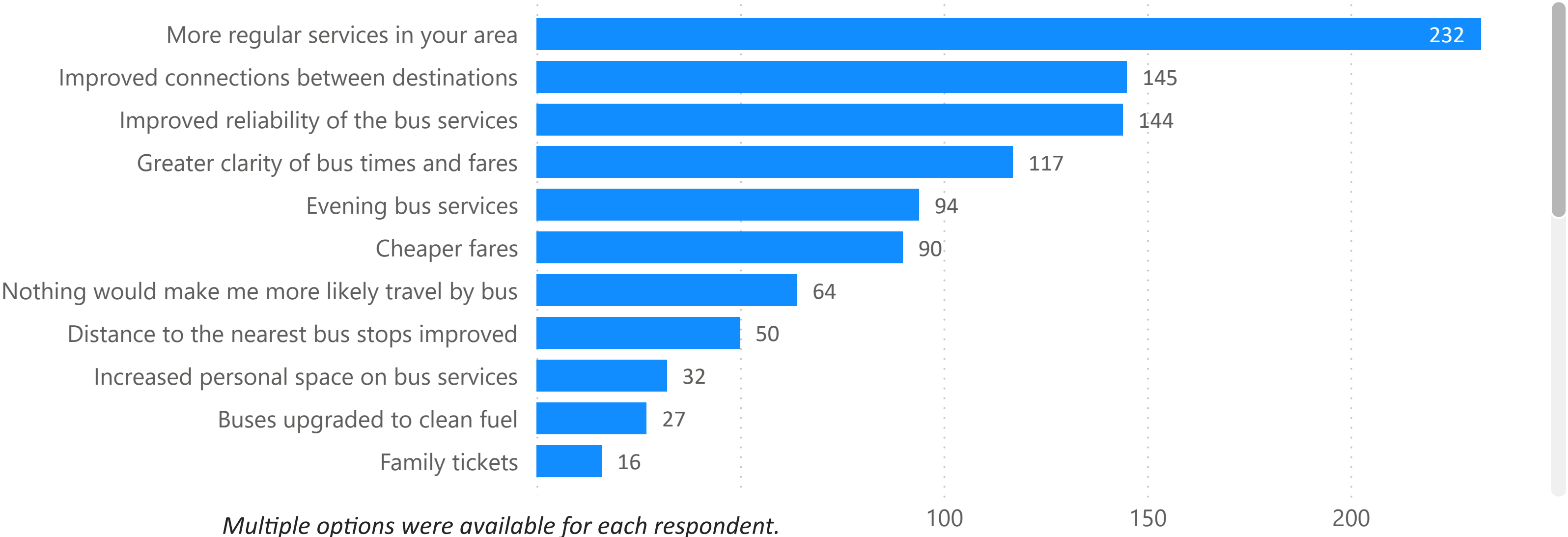
As part of the 2025 Essex Bus User Survey, a total of **414 non-bus users** completed the questionnaire:

- **18%** of respondents indicated that driving was a more convenient option, which influenced their decision not to use bus services.
- **16%** cited a lack of available bus services in their area as the primary reason for not using public transport.

Non Bus User - Why not bus?



Non Bus User - Are there any changes that would encourage you to use the bus?

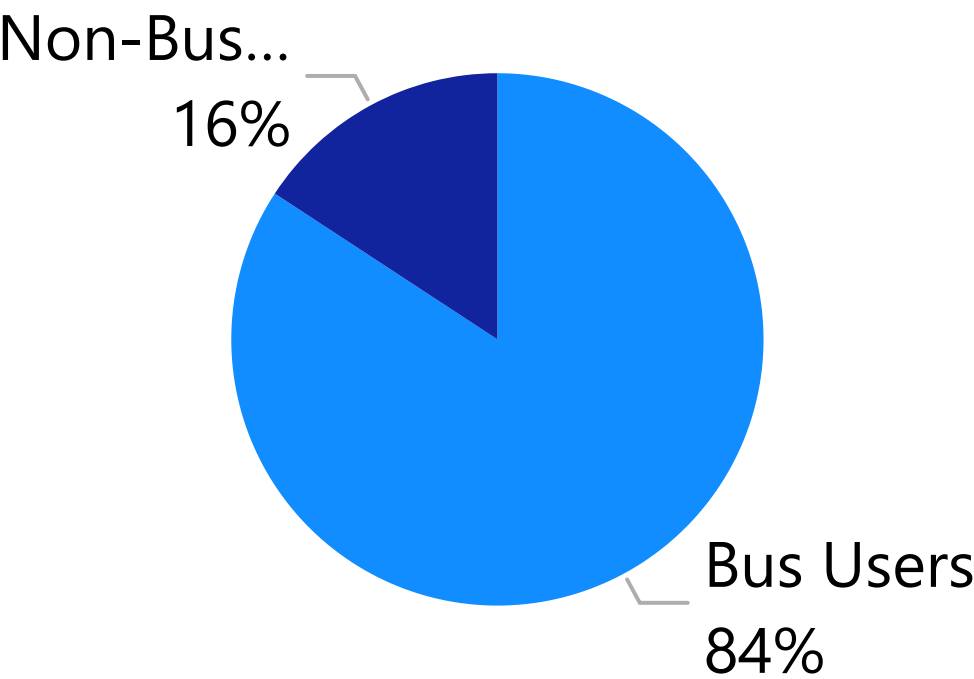


Among **non-bus users** surveyed:

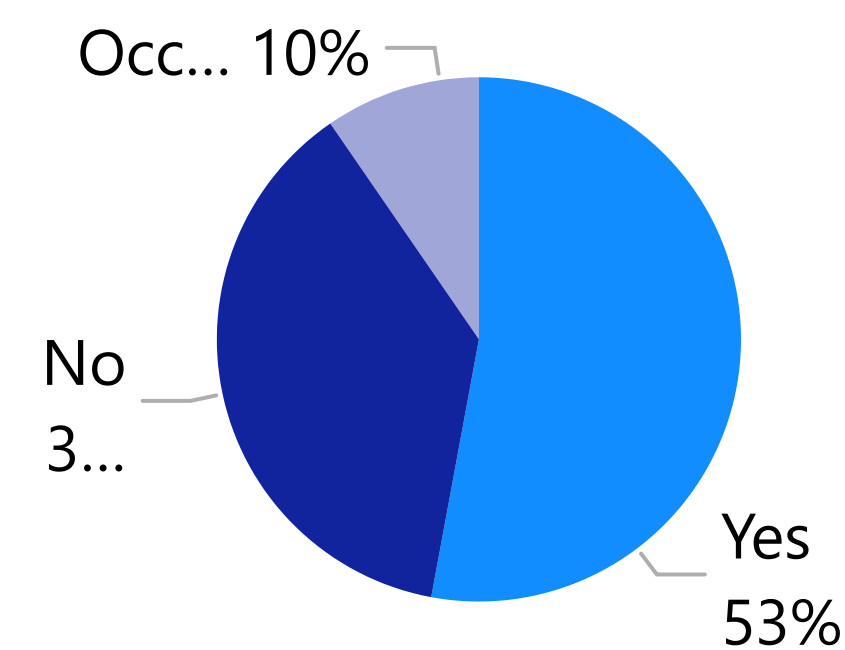
- **22%** indicated that the introduction of more frequent services in their area would encourage them to use buses.
- **14%** suggested that better connections between destinations would make bus travel a more viable option for them.

Demographics

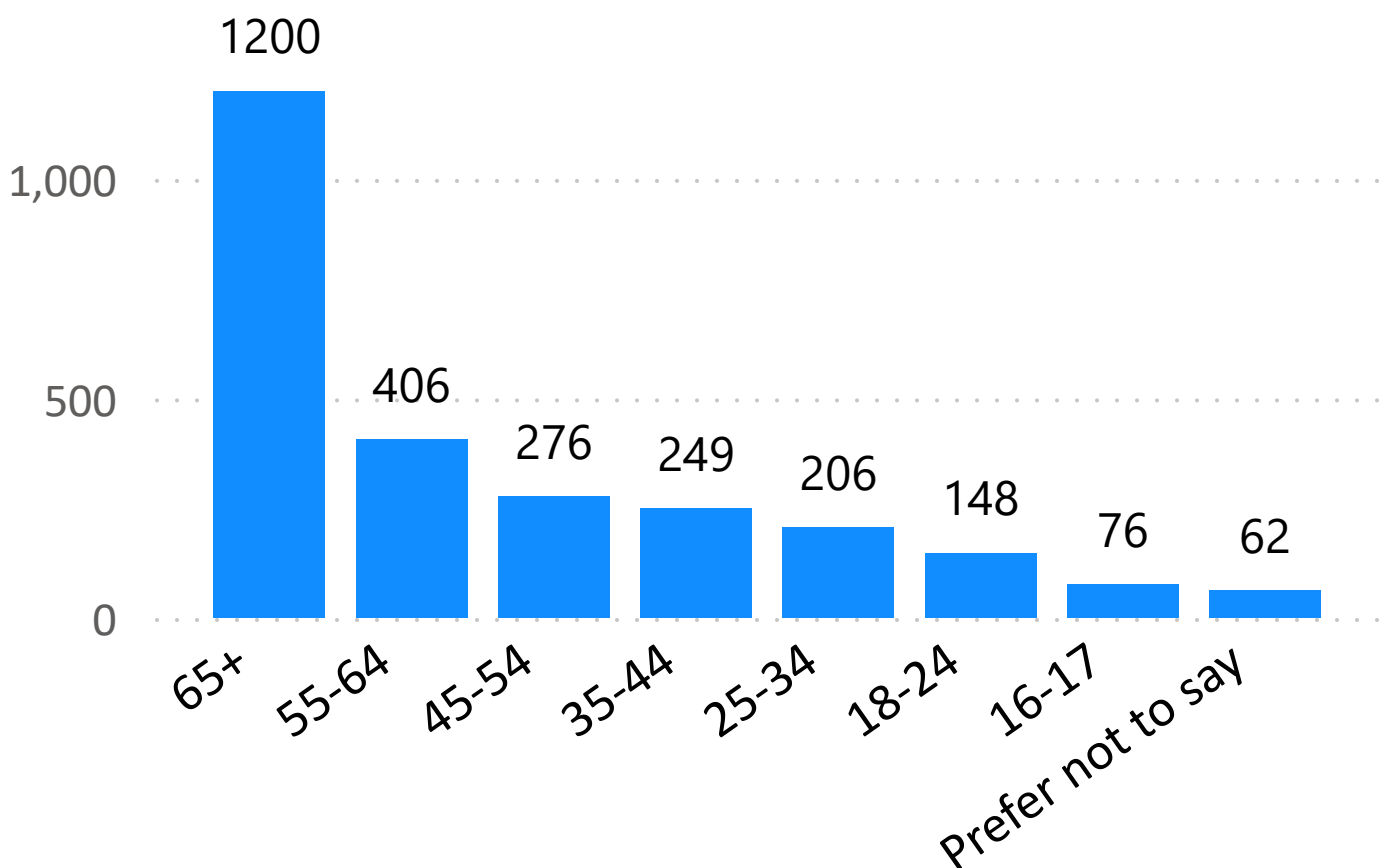
Bus Users



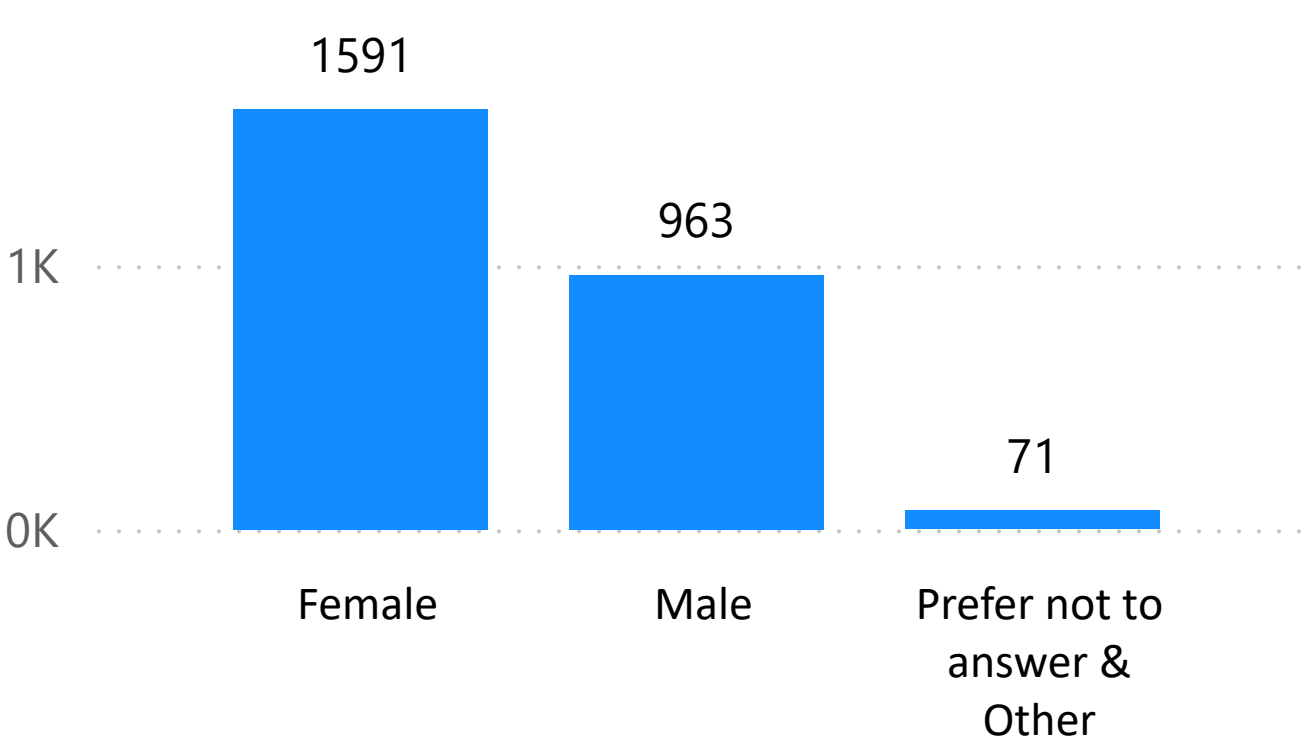
Access to a Car?



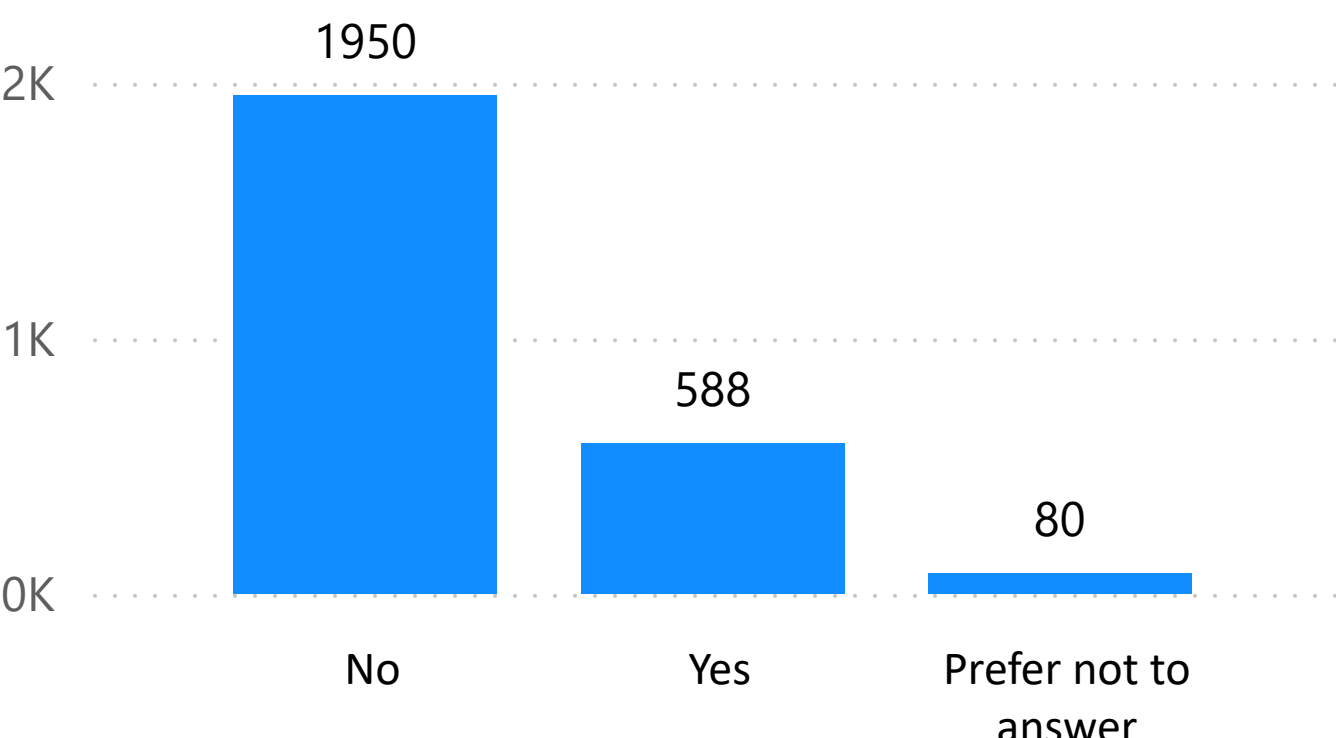
Age Group



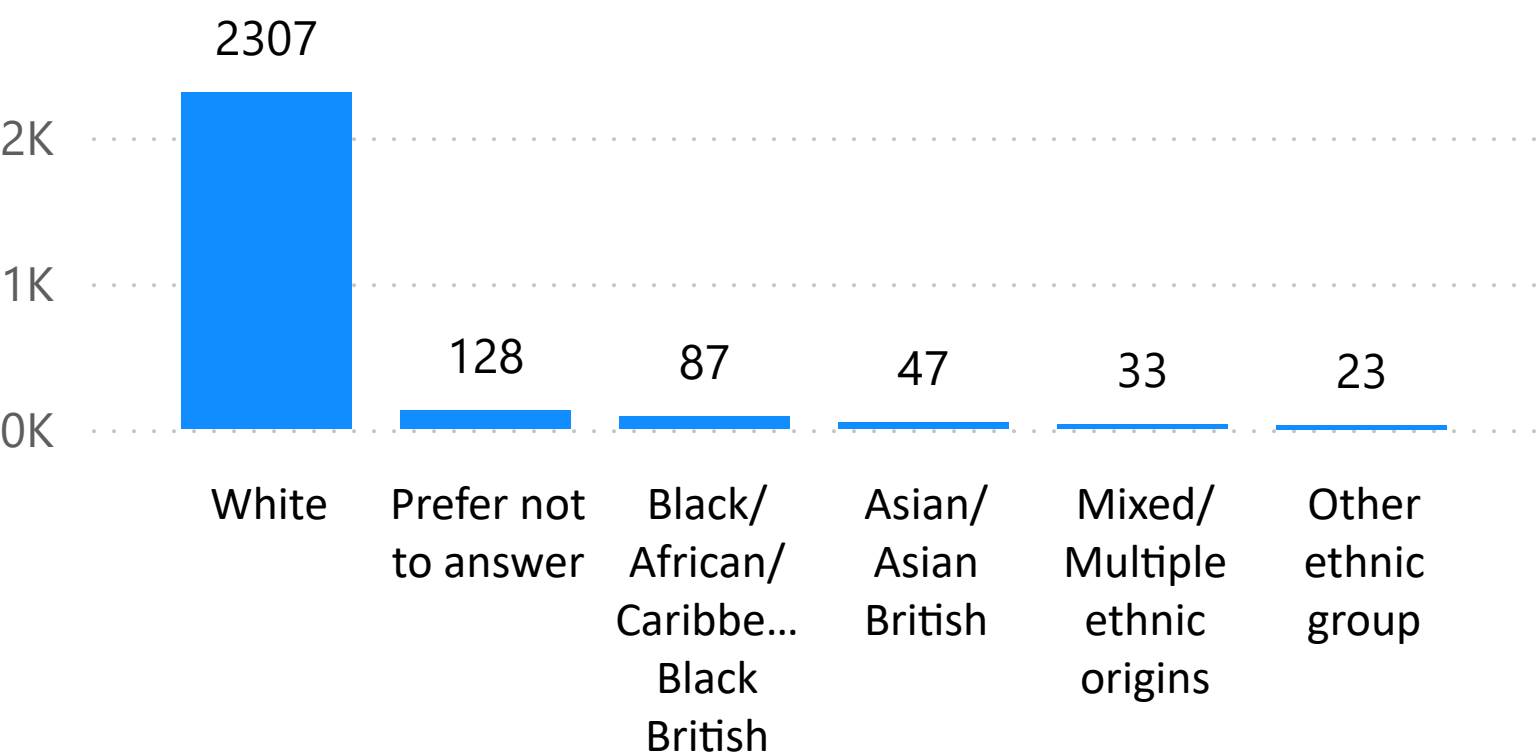
Gender



Disability

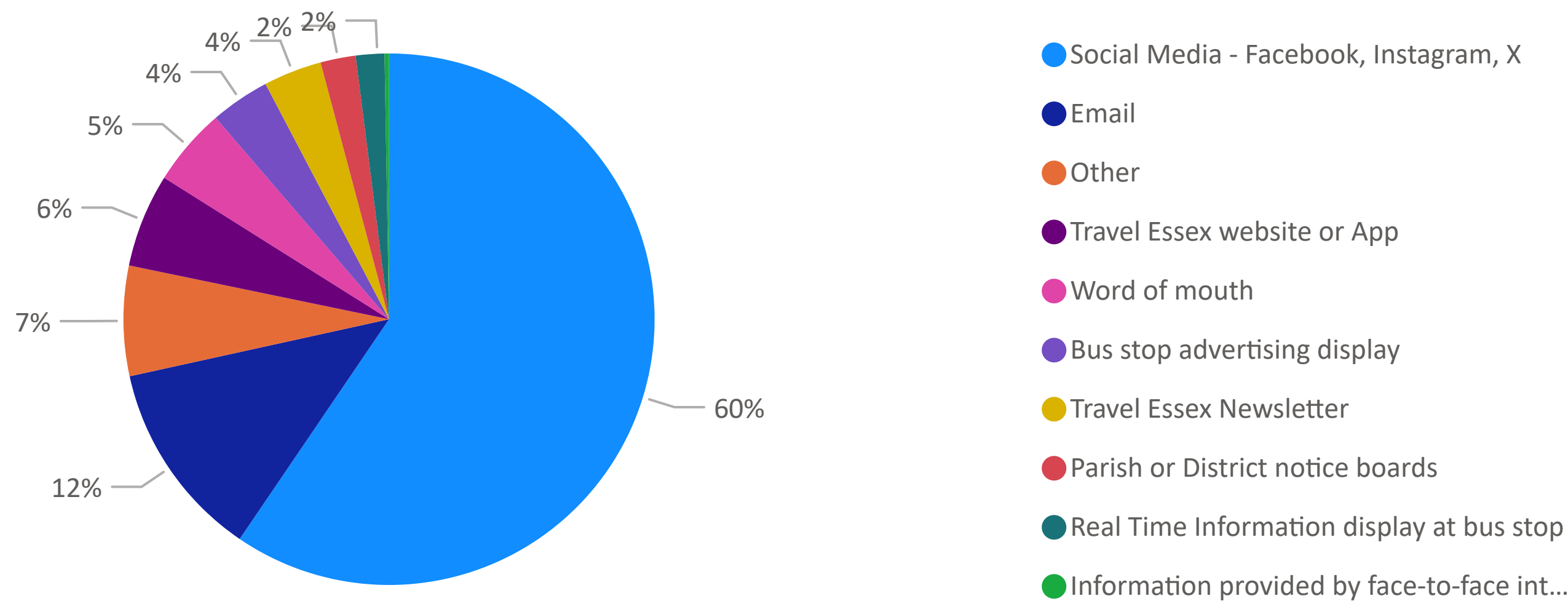


Ethnicity

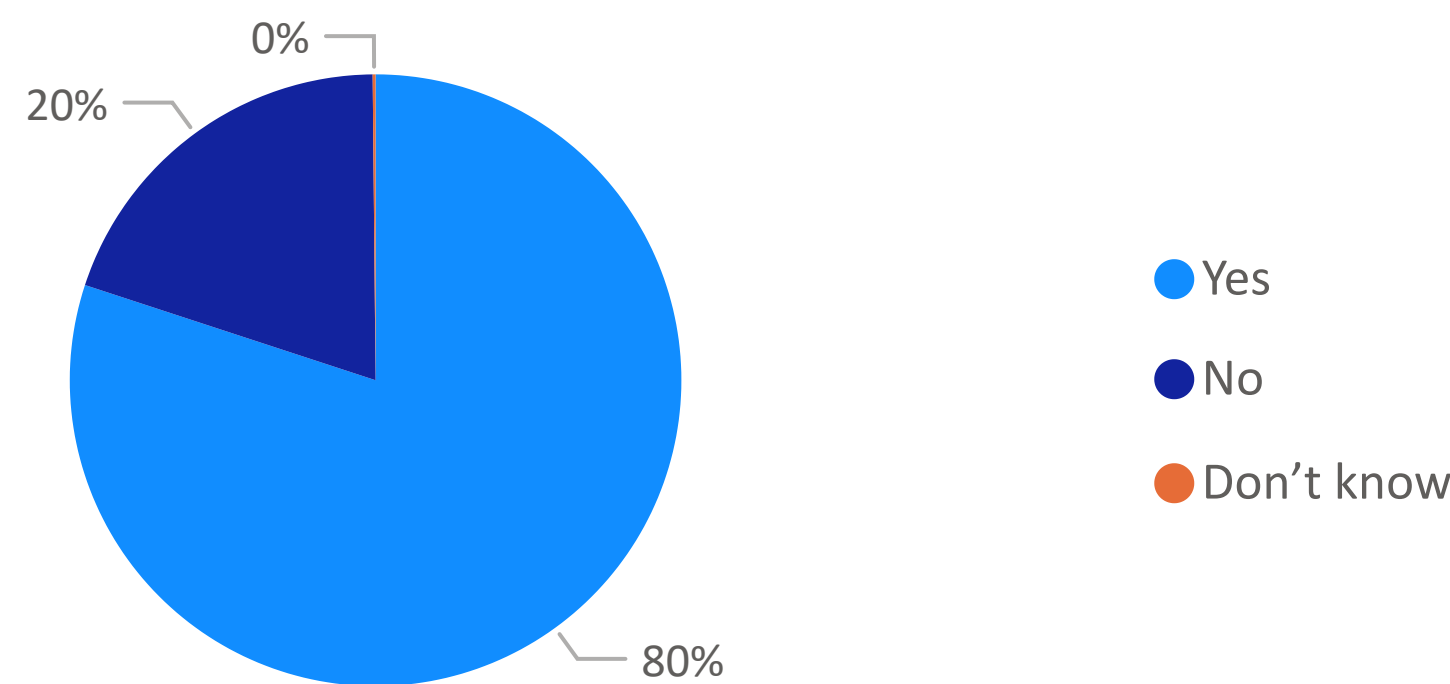


2025 Survey Information

How did you hear about the Essex Bus Survey 2025? *



Are you aware of the £3 bus promotion scheme by £3 bus scheme?



Awareness of the **£3 bus promotion** is strong, with **84% of bus users** confirming they were aware of the offer. Encouragingly, the campaign also reached beyond regular passengers, with **57% of non-bus users** also reporting awareness

* Online survey only

This information is issued by:
Essex County Council

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