** SURVEY RESULTS 2019**

The annual on-board survey of **Moorsbus** passengers was undertaken from May to September 2019.

Results represent 708 passengers in 446 groups.

Many written comments were also made and are published separately on www.moorsbus.org

 **2019** *2018**2017 2016 2015*

**1. Average number of journeys** per passenger

**3.04** 2.91 3.08 2.63 2.89

**2. Purpose(s) of journey \***

Walk **65%** 59% 65% 64% 60%

*Avg walk duration (hrs)* **3.8** 4.0 4.1 3.4 3.5

Ride in the countryside **47%** 46% 45% 61% 49%

Visit a specific attraction **12%** 21% 23% 22% 19%

Meal **13%** 13% 14% 19% 10%

Shopping  **7%** 8% 6% 15% 6%

Special event  **4%** 5% 4% 3% 0%

Visit friends  **6%** 5% 4% 1% 5% Work / volunteering  **2%** 2% 1% 1% 0%

**3. Places visited \***

28% Pickering 6% Malton

37% Danby 10% Thornton le Dale

32% Helmsley 6% Thirsk

18% Hutton le Hole 4% Dalby Forest

15% Castleton 6% Rievaulx

15% Kirkbymoorside 3% Great Ayton

17% Sutton Bank 3% Stokesley

12% Rosedale Abbey 1% Byland

10% Guisborough 1% Coxwold

**4. Day visits or holiday trips** *compared with 2018*

91% visited from home (90%)

 9% were on holiday (10%), staying an average of 2.2 nights (4.93)

62% were staying with friends and relatives (33)

 9% were staying in a cottage or chalet (22)

15% were staying in hotels and guest houses (13)

 6% were camping (9)

 15% were staying in bed and breakfast (7)

 Holidaymakers spent £40.65 per day in the area (35.35)

**5. Sources of information about Moorsbus \***

Used it before **92%** 89% 74% 53% 75%

Timetable **16%** 21% 21% 26% 19%

Poster  **5%** 6% 8% 8% 8%

Internet  **1%** 5% 9% 9% 6%

Friends / family  **3%** 3% 12% 11% 14%

Bus advertising **2%** 2% 3% 7% 5%

Info centre **2%** 2% 3% 7% 6%

**6. Surveyed passengers receiving Moorsbus information** (by post, online or in person) in last year

***90%***86% 87% 64% 84%

 **2019** *2018**2017 2016 2015*

**7. Quality assessment**

Amount of information **95.0%** 92.5% 92.1% 87.9% 86.6%

Clarity of information **92.8%** 92.7% 92.8% 90.0% 84.0%

Accuracy of info **95.6%** 92.7% 95.0% 93.7% 91.0%

Routes taken **94.8%** 90.9% 90.9% 87.5% 96.6%

Frequency of buses **90.9%** 88.4% 84.9% 81.3% 69.2%

Value for money **98.9%** 98.9% 97.9% 97.9% 95.0%

Reliability **99.3%** 98.3% 97.6% 97.6% 89.6%

Comfort **97.0%** 95.0% 93.7% 94.5% 87.8%

Drivers **99.4%** 99.2% 98.5% 99.0% 95.6%

*Average assessment* ***96.0%*** *94.3% 94.5% 92.2% 88.3%*

**8. Average spend per day** per group

Food and drink **£ 8.23** £ 9.84 £ 9.72 £ 8.85 £ 8.22

Recreation **£ 7.63** £ 6.71 £ 2.34 £ 0.81 £ 1.15

Shopping **£ 9.45** £12.65 £ 5.35 £ 4.79 £ 4.63

Transport **£ 10.20** £ 9.00 £ 7.12 £ 2.53 £ 5.25

Other spending **£ 3.68** £ 6.38 £ 1.68 £ 0.58 £ 0.42

**Total spend / group £39.19** £44.57 £26.21 £17.57 £19.67

***Average spend per passenger 2019: £24.69 (****2018: £24.49)*

**9. Age** of passengercompleting the survey

Under 24  **3%** 1% 2% 2% 4%

24 – 40  **2%** 2% 2% 2% 5%

41 – 59 **5%** 4% 8% 14% 6%

60 – 70 **38%** 52% 59% 52% 51%

Over 71 **53%** 42% 29% 39% 35%

**10. Car ownership and accessibility** *(2018 in brackets)*

**33%** (38%) of passengers were from a car-owning household.

**24%** (25%) of them could have used it on the day of travel

*(making a positive choice to abandon the car for the bus)*

**66%** (62%) of passengers were from a household without a car

**11. Average size of party**

**1.59** 1.75 2.07 2.17 1.78

**13. Number of journeys starting by train** *compared with 2018*

**4%** 4%

**12. Future plans** *compared with 2018 and 2017*

Services should start earlier in the day **9%** 13% 24%

Services should start later in the day **3%** 3% 4%

Overall times are OK **67%** 66% -

More routes should be provided **28%** 31% 48%

Should operate for longer season **41%** 48% 38%

**14. Places Moorsbus should serve**

Passengers listed over 20 locations they would like Moorsbus to serve. The most frequently requested route was Osmotherley & Hawnby via Square Corner, followed by Lastingham, further into Dalby Forest (Bridestones, Staindale, Hackness) and Esk Valley villages (inc Lealholm, Grosmont), and Gillamoor.

*\* Totals may add to more than 100% due to multiple answers*

Moorsbus Community Interest Company 2019

**Commentary on the Moorsbus 2019 Survey**

The overall results were very much in line with previous years. Many of those who completed survey forms were regular passengers (92% of respondents had used Moorsbus before). As the survey is a self-completion form available from the Moorsbus InfoBox on each bus, occasional users including overseas visitors were less likely to pick up, complete and return a form. This may distort the overall picture. Although the CIC Directors travel on most buses on most days, handing out and collecting survey forms, we would like to carry out more comprehensive survey work, albeit with miniscule resources and relying on a handful of volunteers, there are severe limitations on what can be undertaken.

The **Quality Assessment** helps us judge whether we are achieving our aims. It shows improvement in all categories with an average satisfaction rating of 96%. This is an excellent score compared with any other bus operation, and our drivers scored an outstanding score of 99.4%. There were variations in scores, with those who paid fares (as opposed to using a National Concessionary Travel Pass) tending to score us lower in several categories.

**Purposes of journeys** were varied and much travel was multi-purpose. The percentage undertaking a walk as part of their Moorsbus day increased to 65%. This includes those for whom the focus of their day was a walk of 5 or 6 hours (often dictated by Moorsbus timetables), as well as those who just went for a half hour stroll as part of a visit. At the more functional end, passengers listed *‘going to the bank’*, *‘volunteering’* and even *‘attending a wedding’* as a reason for their journey.

91% of passengers were **visiting from home**, mainly in the North East and Yorkshire. 4% of Moorsbus journeys started with a **rail journey**, including from places as distant as Reading, London, Colchester and Edinburgh, although more from Tyneside, Wearside, and West Yorkshire.

The **average spend** per passenger was £24.69, equating to a total Moorsbus-generated sum for the local economy of over £270,000. Individual spending patterns varied immensely, with some passengers noting on the survey form their detailed spending on items such as an individual coffee.

The **age profile** of Moorsbus passengers has shown the inevitable – we are all getting older. Over half the passengers are over 71, with many saying that Moorsbus brings social benefits, friendship and health opportunities otherwise denied them if they do not have access to a car. At a time of increasing isolation for older people, we feel this is very important and factors such as our reliability and friendly drivers are part of the equation. Health also features with our younger users including runners as individuals or as a group and for whom Moorsbus provides a facility to get them to the start of their run.

Lack of **car ownership** is an important feature, with 66% of passengers coming from a household without a car. Moorsbus offers the only public transport access to places such as the two National Park Centres (at Danby and Sutton Bank), Rievaulx Abbey, Bilsdale and much of the central moorland.

The **aspirations** of passengers are substantial and unfortunately most are beyond the CIC’s reach. Due to road width and other physical issues, many **destinations** on these ‘wish lists’ can only be served by minibus. These are not financially viable as the unit cost per day is almost as much as a full-sized bus, but can only seat 16 whereas a full sized vehicle may have over 40 seats and the legal capacity for 20 or 30 standing if required. Fewer passengers wanted ‘more routes’ in 2019 (28%, compared to 48% in 2017), which may reflect an appreciation that Moorsbus is already under extreme pressure to fund current operations and adding more routes is unlikely to generate greater income as most passengers use either a Moors Rover ticket or a bus pass. As for **departure times**, 67% thought they were ‘OK.’ Most of the 3% requesting ‘later’ start times were living where long journeys commence (such as the 08:05 start from Darlington), whilst the 9% asking for an ‘earlier’ start were in places such as Pickering or Helmsley which are some way into the journey for longer routes and therefore departing at 09:30 or 10:30. We would like to operate over **‘a longer season’** as requested by 41% of respondents, but once again, finance is limited.

Over 78% of our passengers use *English National Concessionary Travel Scheme* passes giving them ‘free’ travel on Moorsbus. We really welcome these users, although it comes at a significant cost to us. Compared with last year, the reimbursement rate from some local authorities has decreased, resulting in us getting less than £1 per passenger for a journey of over 54 miles. This is about 10% of what a fare-paying passenger would pay and underlines the real problems of trying to run a quality bus service in a rural area with little support from the public sector.

*Moorsbus is a network of local bus services designed and operated by a not-for-profit Community Interest Company, run entirely by volunteers.*

[**www.moorsbus.org**](http://www.moorsbus.org)November 2019