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7

HI TRANS
THE HIGHLANDS AND ISLANDS TRANSPORT PARTNERSHIP

Report to Partnership Meeting 7th November 2025

RESEARCH AND STRATEGY DELIVERY

Your Bus Journey Survey

Purpose of Report

The purpose of this report is to inform Members of the interim findings from the *Your Bus Journey (YBJ) Survey 2025*, undertaken by Transport Focus, which gathered evidence from passengers across Scotland on their experiences of bus travel. The report summarises the emerging Scotland-wide results and sets out their implications for policy and delivery.

Detailed results for the Highlands and Islands have been compiled separately and are provided as an Appendix for Members' consideration.

Background

The *Your Bus Journey* survey provides one of the most comprehensive insights into passenger satisfaction available in Scotland. By capturing the views of people while they are actively making journeys, the survey offers robust and immediate feedback on bus services. It forms a valuable tool for operators, transport authorities, and national policymakers who seek to monitor performance, identify priorities for improvement, and understand the lived experience of bus travel.

Fieldwork for the 2025 survey began in February and has continued through the year, with data collected systematically across different times of day and journey purposes. Interim results, covering the first five months, are now available and provide an early indication of how passengers perceive the service environment. As with previous years, responses have been weighted to ensure they are representative of the travelling public, enabling valid comparisons across regions.

The interim report confirms that satisfaction remains high overall but reveals areas where performance is more variable. Of particular relevance to HITRANS, the survey includes a regional breakdown that allows us to understand how bus services in the Highlands and Islands are perceived in comparison to the Scottish average. These insights are vital to the development of our Regional Bus Strategy and our wider work on tackling transport poverty and supporting a just transition to more sustainable and inclusive mobility.

Scotland-wide Findings

Across Scotland as a whole, passenger satisfaction levels remain strong, with nine in ten respondents reporting that they were satisfied with their bus journey. The most significant drivers of this satisfaction were the punctuality of services, the professionalism of drivers, and the

overall length of journey time. These elements consistently stood out as aspects of the bus experience most likely to generate positive feedback.

Despite these encouraging results, concerns about value for money continue to temper overall perceptions. Among fare-payers, only three-quarters indicated they were satisfied with the price paid for their journey, with comments frequently pointing to the cost of longer trips, comparisons with other modes, and the affordability of fares relative to everyday expenses. By contrast, passengers using concessionary passes tended to report higher levels of satisfaction. Waiting times and the passenger experience at bus stops also attracted more mixed assessments. While a large majority of passengers expressed satisfaction with the facilities and information available, a notable minority identified long waits and the absence of real-time information as barriers to confidence in the network. These issues were compounded by variations in provision between urban centres and more peripheral areas.

On board the bus, satisfaction with cleanliness, comfort, and personal security remained high, although challenges relating to seat availability and the behaviour of fellow passengers were still reported. Concerns ranged from overcrowding on certain services to disruptive behaviour such as rowdiness, smoking, and loud music. These issues, though experienced by a minority of passengers, have a disproportionate impact on perceptions of safety and comfort.

Journey purpose also influenced satisfaction levels. Commuters tended to be more critical than those travelling for shopping, leisure, or social reasons, with reliability and punctuality weighing heavily on their assessments. Disabled passengers were more likely to highlight difficulties in accessibility, particularly at the boarding stage or when attempting to plan complex journeys. This group reported lower overall satisfaction than non-disabled passengers, reinforcing the importance of ensuring inclusive design and delivery across the network.

Taken together, these findings paint a picture of a bus sector that performs well in terms of core service delivery but still faces structural challenges around affordability, reliability, and integration. Addressing these concerns will be central to achieving national ambitions for greater mode shift from private cars to bus, and to delivering on Scotland’s wider policy objectives for equity, accessibility, and climate responsibility.

Implications for HITRANS

For the Highlands and Islands, the survey provides evidence of both commonalities with the rest of Scotland and unique challenges rooted in geography and settlement patterns. Overall satisfaction in the region is slightly lower than the national average, reflecting the reality that dispersed populations, long distances, and fewer alternatives make shortcomings in service provision more keenly felt.

Passengers in the HITRANS area reported particular difficulties with evening and weekend services, which were consistently described as insufficient to meet social, educational, and employment needs. Reliability concerns, such as delays and cancellations, were also reported more frequently in rural and island communities where alternatives are limited. For those living in island settings, the coordination of bus services with ferry and rail timetables emerged as a critical issue.

Affordability was another recurring theme. While concessionary travel has reduced costs for younger people and older residents, those paying standard fares for longer-distance journeys were more likely to express dissatisfaction with value for money. This points to the importance of addressing not only ticket prices but also the perceived fairness and integration of the system.

Despite these challenges, the findings also reveal opportunities. There is strong support for piloting more flexible, demand-responsive models of bus provision, particularly in areas where conventional fixed routes cannot realistically meet the needs of small or dispersed populations. The appetite for better integration between bus, rail, ferry, and active travel modes is also clear, with passengers keen to see more seamless journeys and improved ticketing options.

For HITRANS, these results reinforce the strategic direction already being pursued through the Regional Bus Strategy. They highlight the importance of combining conventional services with innovative delivery models, embedding community engagement in service design, and continuing to advocate nationally for policies such as minimum mobility guarantees that recognise the distinct needs of rural and island populations.

Next Steps

The interim findings will now be used to inform the next stage of the Regional Bus Strategy, ensuring that passenger perspectives are embedded within the framework of delivery. HITRANS will also explore opportunities to develop pilot projects that test hybrid service models, combining demand-responsive transport with conventional fixed routes. Engagement with local authorities, operators, and community groups will be essential in designing and delivering these initiatives. At the national level, HITRANS will continue to work with Transport Scotland to advocate for the adoption of minimum mobility guarantees as part of Scotland's just transition agenda. This will ensure that all communities, regardless of geography, have access to a baseline standard of reliable and affordable public transport provision.

Risk Register

RTS Delivery
Impact – Positive
Comment: Strengthens the evidence base for regional strategy delivery, supporting equitable and sustainable mobility.

Policy
Impact – Positive
Comment: Reinforces just transition objectives and national transport priorities around inclusion and mode shift.

Financial
Impact – Neutral/Positive
Comment: Early actions can be delivered within existing budgets, though pilot projects may require joint resourcing with partners.

Equality
Impact – Positive
Comment: Particularly benefits disadvantaged groups, including young people, disabled passengers, and rural or island residents.

Recommendations
Members are invited to:

1. Note the interim findings of the *Transport Focus Your Bus Journey Survey 2025*.

2. Consider the detailed HITRANS results contained in the Appendix.
3. Endorse the integration of this evidence into the Regional Bus Strategy and related policy areas.
4. Support continued engagement with Transport Scotland and operators to advocate for equitable, reliable, and affordable bus services across the Highlands and Islands.

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