

## Summary of Risks and Opportunities for Transport Policy from Covid-19

### The picture from our research

#### Travel during Covid-19 weekly survey<sup>1</sup>

- Use of public transport is increasing slowly; although train travel lags behind bus
- The proportion of those who used buses or trains regularly before lockdown who say that they will be using these modes in the next month is increasing over time, but volumes are still considerably lower than prior to lockdown
- More people are making journeys for leisure reasons
- Those who have used public transport in the last seven days remain more likely than those that have not to think that doing so is more safe, or equally safe as compared to going to shops and restaurants

#### *For those in Wales:*

- Two-thirds (67 per cent) **agree** that they will feel safer using public transport if passengers wear face coverings
- Almost half (45 per cent) **disagree** that they have few concerns about using public transport, which has increased from 40 per cent in June
- Around half (51 per cent) say they will walk more for journeys where public transport was used previously and three-in-ten (30 per cent) will cycle more. In June, Wales had the lowest proportion of people saying they will be happy to use public transport again at 15 per cent, compared with 22 per cent across Britain and 33 per cent among 18-24 year olds
- Almost half (47 per cent) expect to work from home more in future.

#### Analysis of Travel During Covid-19 report<sup>2</sup> – key points

- Still a significant number of people who are avoiding public transport or don't feel it is safe at the moment
- Several key reasons why people are avoiding public transport or don't feel that it is safe at the moment including concerns around face masks, feeling that public transport is 'unclean' and a general distrust in others to follow the rules
- There is a sense of having less control on public transport than in other places making it feel less safe, such as not being able to get 'off' easily.

#### Transport User Community<sup>3</sup> views

- Respondents have never seen their trains as particularly clean, Passengers will not return to rail if they feel they are paying extra for a standard of cleanliness and capacity they felt entitled to long before Covid-19. Previous research has shown that commuters feel 'hostage' to rail.

<sup>1</sup> A weekly survey of over 2000 people, asking them about the travel behaviours and their attitudes towards travelling.

<sup>2</sup> Analysis of the feedback comments from the weekly survey, [4 September 2020](#).

<sup>3</sup> Community of 60 people who were regular rail users, who we use as a sounding board to discuss issues and concerns.

- There is an opportunity to promote public transport as opposed to car use for a more sustainable transport system. Passengers want rail to succeed, and to some extent recognise things ‘must’ return to normal, but need their concerns addressed.
- A mixed approach of home working and office working is seen as ideal for most; our community argue that home working allows for a greater work life balance and better wellbeing overall. Many wonder why they hadn’t adopted a home or mixed working approach long ago. Those who have been made redundant will actively search for jobs that do not require a rail commute.
- Passengers see crowding as unmanaged and unpredictable and solving the issue is seen as a shared responsibility. Employers must implement flexible working policies to end the ‘peak/off peak’ situation that leads to crowding. Passengers must plan ahead to travel in less congested periods where possible, respect social distancing and respect staff who enforce the rules. Operators must arm passengers and employers with the information necessary to plan around the crowding – passengers expect an on-demand, technical solution to indicate how crowded their train or bus will be.
- Leisure journeys by rail have declined sharply among our community members. While most recognise that the rules allow for discretionary rail travel, concerns remain. Images in the media of overcrowded beaches and parks have led to a renewed fear of making day trips. Our community does not want to contribute to overcrowding or the spread of the virus and are therefore keeping their leisure trips local and small scale.
- Bus travel has more space, so has become more pleasant, but with an underlying anxiety about potential lapses in social distancing.
- Those who are not taking the bus take a very pessimistic view of its safety during the pandemic. Many assume that non-wearing of face masks will be rife. Others assume that the atmosphere would be even more tense than active passengers reported – as with our rail users, stories about young people ignoring the regulations have spread far.

## Issues arising

### Continuing perceptions gap – people want reassurance

Our surveys have highlighted the gap between the views and experience of those people actually using public transport and the perceptions of those who are not. There are signs that attitudes may be slowly shifting. However, a significant number still say they have been avoiding public transport and they don’t feel safe using it, particularly making comparisons with restaurants and pubs, with specific measures and the attention paid to customers when eating out in recent weeks. Changing perceptions will be very hard for bus and train operators, but it is vital for concerns to be addressed with measures such as active management of face coverings, staff visibility and higher profile of cleaning regimes.

We have called for incentives – including better value rail fares and a ‘Head Out to Help Out’ offer – to remove barriers to giving public transport another try. However, people want

firm assurances about safety measures and a sense of accountability and commitment they will be delivered, giving confidence to travel. Alongside this it is crucial to concentrate on essentials of punctuality, reliability, value for money and inclusive accessibility. Our priorities for improvement work<sup>4</sup> demonstrates the continuing need to focus on the core product and the importance of not losing sight of this when looking at the future.

**Fares:** The prospect of a price increase in January sends the wrong message. With the industry struggling with how to get people back on rail, there is the need to tap into new working practices and a key opportunity to do things differently

- Carnets and flexible tickets: work from home has given previously captive commuters more choice of whether to travel or not. Rail has to adapt. Transport for Wales Rail's multiflex is a good example – but is this available across all routes? What is interoperability with other train companies' versions?
- Simplify the structure: many passengers see the fares structure as complicated, confusing, illogical and expensive – and split ticketing erodes trust. Single leg pricing, simpler ticket ranges and addressing anomalies will help to give passengers confidence they have bought the best value ticket for their journey
- Rail fares and ticketing reform: prior to the pandemic fares and retailing reform was high on the agenda as part of the Rail Review recommendations. Transport Focus is urging that reform of the complex rail fares system is urgently accelerated, to deliver a better value for money fares system for passengers.

**Performance:** During lockdown punctuality has been around 95 per cent – almost unheard of from a few months earlier. As timetables ramp up and as more people return again, there is a need to look at timetables and fix any pinch-points. So the lessons can be learnt to maintain these levels of performance and the timetable rebuilt with reliability.

**Building confidence:** it is vital for both the perception and experience of public transport to build trust. Focus must be given to core elements of reliability, frequency, value for money and visibility of staff. However our research shows these must be supported by further measures:

- Real time information: Providing digital information gives the ability to personalise, giving better value to passengers. A lot of work has been going into real-time loading and crowding information, which coupled with real time running details, provides a good package for passengers. Adding automatic *Delay-Repay* and digital ticketing into that mix makes it much more of a seamless bundle – ticket, personalised information and compensation in one package.
- Wi-Fi: A potential future shift towards more leisure travel rather than commuting highlights the need to look at making the journey itself a more valuable experience. Wi-Fi is the aspect that brings people in and enables them to engage in activities while travelling. Recent research<sup>5</sup> by us on behalf of the Department for Transport

<sup>4</sup> People ranked the things that would most improve their journeys – [Rail passengers' priorities](#) July 2020 and [Bus passengers' priorities](#), September 2020, which also looks at both youth and non-user priorities.

<sup>5</sup> [Keeping connected: rail passengers' experience of internet connectivity](#), July 2020

suggests there is plenty of room for improvement before passengers receive the usable bandwidth that gives the positive journey experience they want.

**Co-ordination with England:** Virus restrictions and cross-border differences have added to confusion of who can travel and when. Are there lessons to be learnt that point to a need for better arrangements for when Transport for Wales Rail services cross the border?

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