

Travel during Covid-19: key lessons for 2021 and beyond

January 2021



Summary

Throughout the Covid-19 crisis Transport Focus has published insight to ensure that transport users' voices are heard.

We have found the majority of passengers using public transport have felt safe, in relation to Covid-19, when travelling. However, less than half of people who have not used public transport say they would feel safe if they made a journey.

This gap between experience and perceptions reflects the efforts public transport operators have made to help their passengers travel with confidence and feel safe. This also highlights the shift in some people's attitudes and the challenge operators may face when trying to attract people to return to public transport in future.

Transport Focus insight confirms we should not expect a quick return to the 'old normal' for public transport, with hopes that more space onboard, improved cleanliness and sanitation will remain even post-Covid. Meanwhile the pandemic has prompted changes to how people work, with our insight confirming many people expect to work from home more and commute to workplaces less often in future.



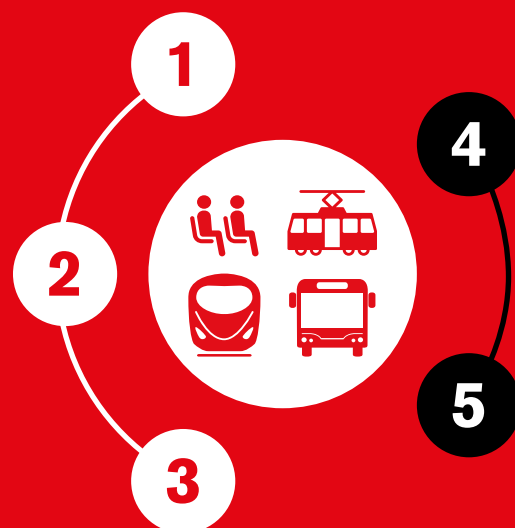
Our insight points to five key areas where transport operators should focus their efforts.

**Ensuring
passengers
can make
essential
journeys with
confidence
now**

Provide capacity and improve information to support social distancing onboard

Maintain improved cleanliness and communicate this effectively

Drive up compliance with the rules, especially face coverings (if not exempt)

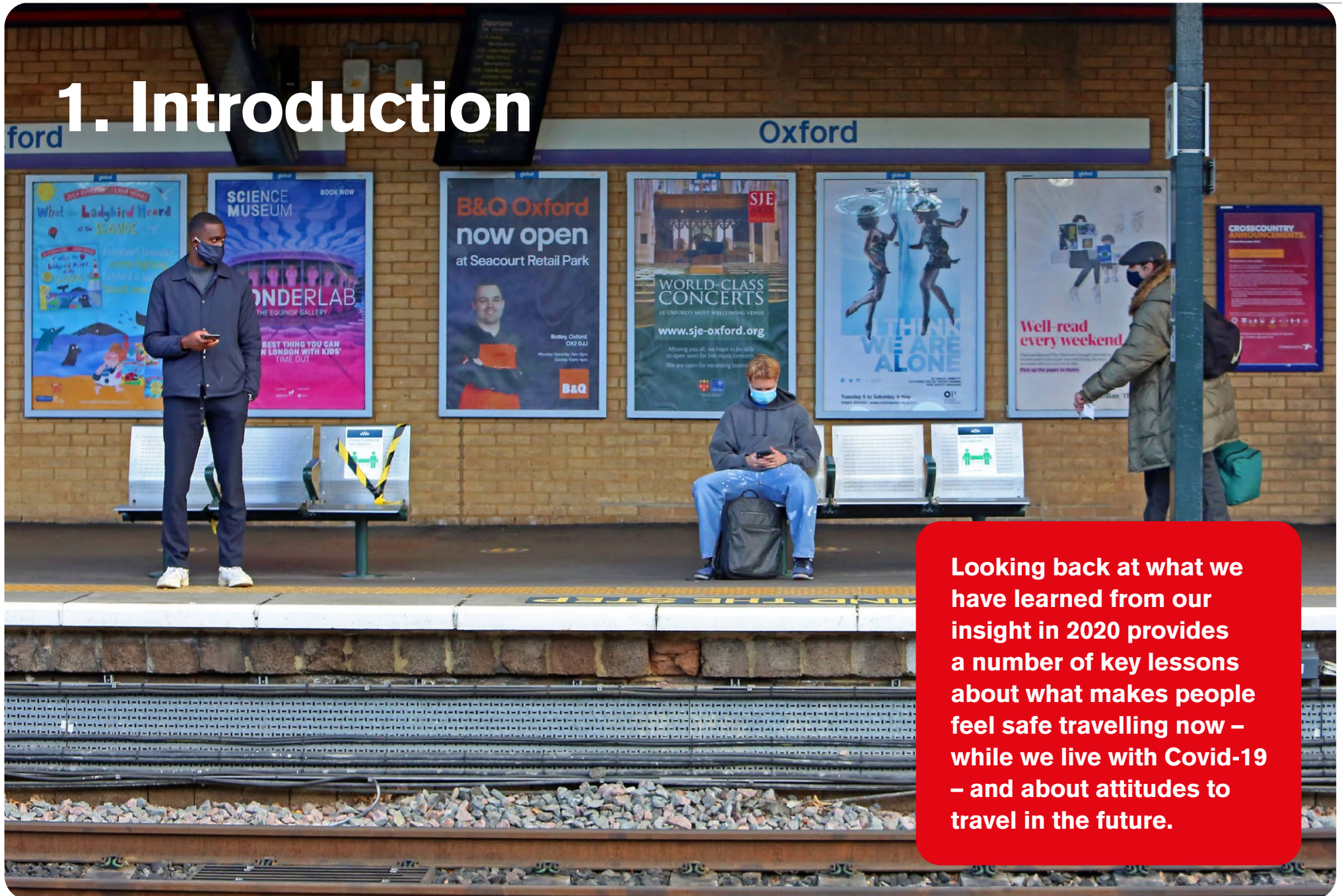


More flexible fares for less frequent commuters

Offers and promotions to encourage lapsed users to return

**Attracting
passengers
back when the
time is right**

1. Introduction



Looking back at what we have learned from our insight in 2020 provides a number of key lessons about what makes people feel safe travelling now – while we live with Covid-19 – and about attitudes to travel in the future.



Use of public transport has been very low, while journeys by road have been less impacted by concerns about the virus. 2021 has been marked by a return to strict lockdowns and ‘stay at home’ messages in England, Scotland and Wales. It’s clear from this that it will still be some time before more people can return to public transport and the process of recovery can begin. Meanwhile, it remains vital people who need to use public transport for essential journeys feel as safe and confident travelling as possible.

This report highlights some of the key findings from our insight and draws out the lessons governments and transport operators can apply to help passengers that need to travel now feel more confident, and when the time is right, help more people return to public transport.

2. Transport Focus insight



Throughout the Covid-19 crisis Transport Focus has been publishing insight to ensure that transport users' voices are heard by transport providers and governments.

Regular reports have provided invaluable, independent evidence on transport users' views.

This ensures decision makers can understand the views of transport users – and often as importantly lapsed users – and respond to their needs.

Our key insight has included:



Travel during Covid-19 tracker survey – with more than 60,000 responses across 33 weeks in 2020. This work has robustly tracked people's use of transport, their perceptions and concerns, their satisfaction with their journeys and how safe they have felt when travelling. All the results are available for further analysis on the Transport Focus [Data Hub](#).



Transport User Community – with 160 participants across rail, bus and road providing in-depth qualitative feedback on a diverse range of issues from cleanliness of public transport, vaccines and Christmas travel. This has allowed us to test complex ideas and provide timely and actionable feedback to transport providers.

Transport User Panel – with thousands of transport users on our panel this allowed us to react quickly at the beginning of the pandemic and ensure transport users' voices were heard on ticket refunds. Further insight is due to be published on changes to working patterns and ticket needs.

3. Perceptions of safety

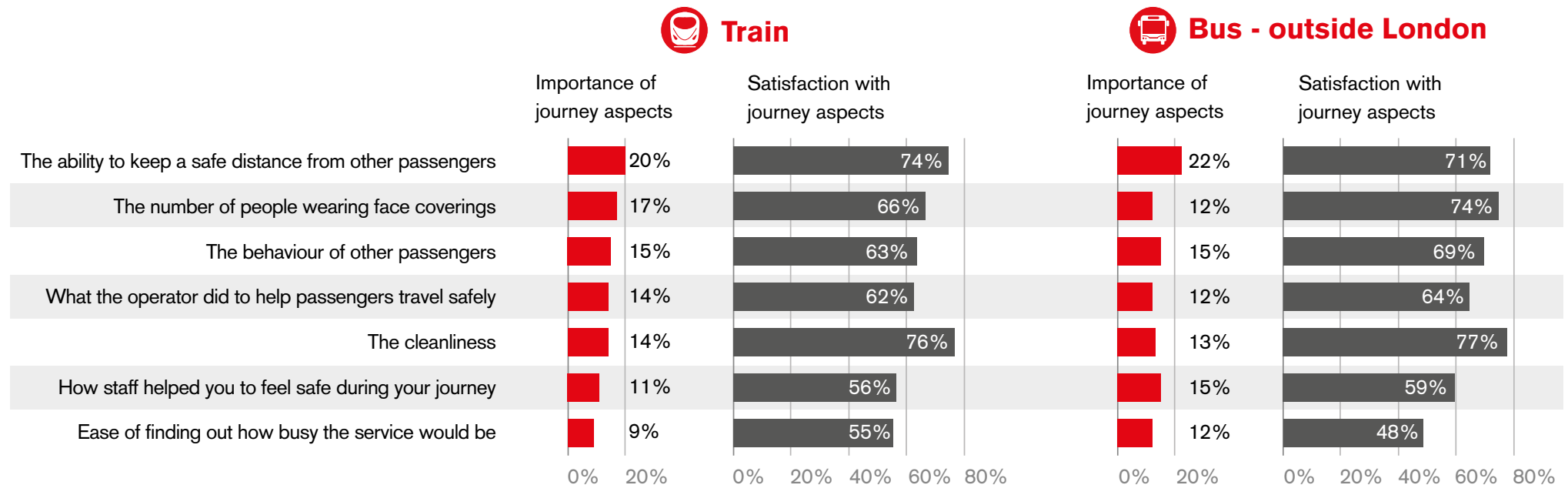
The majority of passengers feel safe

Our insight has shown the majority of passengers using public transport have felt safe, in relation to the Covid-19, when travelling. Our Travel during Covid-19 survey has consistently found:

- almost nine in 10 who had used a train in the last seven days said they felt very or fairly safe

- around four in five who used a bus in the last seven days said they felt very or fairly safe.

So, what makes passengers feel safe? Statistical analysis allows us to provide insight on how important each aspect of the journey experience – which we have been tracking satisfaction with every week – is in driving passengers' perceptions of safety while using public transport.





The ability to keep a safe distance from other passengers is the most important driver of passengers' perceptions of safety across both bus and rail travel.

This analysis shows all aspects of the journey experience measured in the Travel during Covid-19 survey are important for passengers and their perceptions of safety, but some key insights emerge:

- The ability to keep a safe distance from other passengers is the most important driver of passengers' perceptions of safety across both bus and rail travel. Operators should continue to provide sufficient capacity to allow passengers to social distance and seek to improve information about busy/quieter services so passengers can plan.
- The behaviour of other passengers and the number of passengers wearing face coverings are both important. They are closely linked and should remain a focus for improvement, especially on trains, where satisfaction is lower than on buses.
- Cleanliness is important, but passenger satisfaction is higher than for other aspects of the journey – operators should focus on consistently maintaining higher standards and further raising awareness of their efforts.

Many people not using public transport say they wouldn't feel safe

While our insight shows the majority of those using public transport have felt safe, we have found those not using public transport often have a different view. Our Travel during Covid-19 survey has consistently found less than half of those who haven't used public transport in the last 7 days say they would feel safe if they made a journey.

In our first 2021 survey, as the new Covid-19 'variant' has emerged and the pandemic has worsened, perceptions of safety for those not using public transport have fallen further:

- just one in three people that hadn't made a recent journey by train thought they would feel safe
- less than three in 10 people who hadn't made a journey by bus thought they would feel safe.

This gap between experience and perceptions is one of the most significant issues highlighted by our Travel during Covid-19 survey and suggests it will be a challenge for public transport operators to attract passengers back in the longer term.

People...are in a very enclosed space without fresh air and often can't maintain a good distance. Ventilation on public transport is poor and vehicles are not cleaned regularly/ properly.

Because there's no escaping public transport once you're on and it's moving. In shops, restaurants & pubs you can assess the risk according to how busy it is and how many are breaching the rules by not wearing a face covering & you are then able to walk away if the risk feels high.

Why did people say they wouldn't feel safe? In the summer in depth analysis of our Travel during Covid-19 survey found that among the substantial minority with concerns about public transport, key concerns and perceptions included that:

- other passengers can't be trusted to follow 'the rules' on wearing face coverings and social distancing and not enough is being done to ensure compliance
- passengers have no control once onboard a bus or train, being 'trapped' in an enclosed space with limited ventilation or realistic opportunity to leave if they feel unsafe
- based on their previous experience public transport just isn't clean enough, contrasted unfavourably with places such as restaurants where they see visible, frequent cleaning by staff.

These key messages were echoed by our [Travel during Covid-19 survey in October](#) which found that of those people saying they were avoiding using public transport:

- more than half said 'I don't think it's possible to keep a safe distance from other passengers'
- two in five said 'I don't think it's clean enough'

- two in five said 'I don't think enough passengers are wearing face coverings'.

Of course people's perceptions of transport don't exist in a vacuum. When restrictions were relaxed in 2020 everyone had to make judgements about what they felt safe to do or preferred to avoid. Between August and October, we consistently found around two in five people who hadn't used public transport in the last seven days thought it was less safe than other places like shops, restaurants and pubs. This compared to less than one in five of those who had used public transport that felt the same way.

[Insight from rail passengers in our Transport User Community](#) confirmed many saw public transport as 'riskier' than going to a pub or restaurant or visiting friends or family at home, though less risky than travelling by plane.

3. Perceptions of safety

4. A 'new normal' – changing attitudes to travel and work in future



Has the pandemic fundamentally changed people's views of and needs from public transport?

As well as understanding experiences and perceptions of travelling during the pandemic we have also gathered insight on passengers' view on the future, including how they think they will travel, how often and what will be important to them.

"I was pleased to hear about the various vaccines, but it seems will take some time for everyone to have the vaccine, so there will still be a risk on public transport for another year, I think. I don't think I will be doing anything different or taking public transport yet for sometime to come.

Male, 49, East of England, bus passenger

I'm not sure there will be a 'normal' again. However I think the implementation of the vaccine will make the wider public feel more confident about going back to a usual way of living.

Female, 28, North West, bus passenger

Travel choices in a 'post-Covid' future

Towards the end of 2020 our [Travel during Covid-19 survey](#) allowed us to gain an insight into what people say about their future travel choices:

- One in three agreed 'when Covid-19 no longer poses a significant risk (when there is a vaccine), I will drive more for journeys where I would have used public transport before the pandemic'
- Less than three in five of those who previously used public transport regularly agreed 'if there is an effective vaccine for Covid-19 then I expect to use public transport as much, or more, as I did before March this year'. And almost half of those who disagreed said the reason was 'because I will still have concerns about using public transport'

These findings confirm we shouldn't expect a quick return to the 'old normal' for transport. Again, we dug deeper with the [Transport User Community in December](#). We asked them what life will look like once the vaccine is rolled out and how they feel about the prospect of using public transport once a vaccine is in place? We found:

- There is significant work to do to ensure that public transport does not feel in some way 'different' to other activities once the 'new normal' sets in and a hope that social distancing and strong sanitation habits will remain the norm.
- There is some fear that hygiene standards will fall back to pre-Covid levels and social norms such as shaking hands and standing close to strangers on public transport will likely be a source of anxiety for the foreseeable future.
- A continuing perception for some that public transport felt 'less safe' compared to other activities such as going to the pub or shops, meaning an expectation that everything else needs to feel normal before they will return.

I would like to continue a mixture of working from home and travelling into the office as I feel interaction is important however busy working life means working from home a few days a week will ensure more family time. We have shown that my business can function from home as a result of the pandemic.

Male, 35, Wales, rail passenger

The future of commuting

As important as people's attitudes to public transport is whether they have a need to travel. It's now clear that for many people where we work and how often we commute has changed. The pandemic meant a sudden stop to commuting for millions of people and, a year on, many will still not have returned to their workplace.

Even in the summer of 2020, when we published [Fairer fares – future of rail commuting](#), it was clear from our insight that changes in how and where many of us work will be long-lasting. Our Travel during Covid-19 survey found many now thought it was unlikely they would return to a typical Monday-Friday commute in the future. Of those people who commuted by train prior to the pandemic around two in three expected to continue to work from home more often in future and almost one in two thought their job will be homebased with limited travel to their workplace.

More recently, in October, we used our weekly [Covid-19 tracker survey to ask about future commuting habits when Covid-19 no longer poses a significant risk](#). Our survey confirmed that while many former commuters expected to return to

regular commuting, we can expect a significant shift towards more flexible working practices and greater working from home. We found even when Covid-19 no longer poses a significant risk:

- only around a third of former rail commuters expected to commute five days a week, compared to around six in 10 before March 2020
- the proportion of former rail commuters expecting to commute two days a week or less had doubled to three in 10.

The consistent feedback from our Transport User Community has been that for many former commuters Covid-19 has demonstrated home working is possible and effective and that home working allows for a greater work-life balance and better wellbeing overall. It remains unclear when and exactly how often people will commute, but there's no doubt the pandemic will lead to some fundamental changes to the way people think about travel and their need to do so.

5. Lessons for 2021 and beyond - what should transport providers do?





Immediate priorities

While the basic need for a good, reliable service remains, our insight points to three key areas where transport operators should continue to focus their efforts to ensure passengers making essential journeys can do so with confidence.

Social distancing – capacity and improved information

Our insight has shown having space to social distance onboard public transport is the key factor in passengers feeling safe when travelling now. While passenger numbers remain low, operators must of course continue to ensure they provide enough capacity and space onboard for passengers to maintain a safe distance.

To boost passenger confidence and to help passengers plan and avoid busier services operators should also improve the quality and availability of information about how busy services are expected to be. Our [Transport User Community told us in September](#) about their strong desire for more widely available, specific and up-to-date information on how busy trains are and how easy it will be to maintain social distancing. Then in November [some on the community told us](#) they

will have heightened concern about maintaining a distance from other passengers for some time to come.

Clear and up-to-date information about space onboard is vital in helping passengers feel safe now and will be valuable later in attracting hesitant former passengers to return. We will be sharing more passenger feedback soon and working with transport operators to help them improve the information they provide.

Maintain improved cleanliness and communicate this effectively

Our insight has shown that efforts made by operators to enhance cleanliness during the pandemic have not gone unnoticed by passengers. It's important this continues to help passengers making essential journeys feel safe.

It's clear from our insight, including from our [Transport User Community on future priorities](#), that people are likely to remain more concerned about cleanliness and hygiene beyond the pandemic. Assurances on and evidence of enhanced cleanliness could be important in convincing people to get back on board in future too. Even before Covid-19 our [National Rail Passenger Survey](#)



showed cleanliness was one of the key drivers of passenger satisfaction with their journey.

Operators should maintain the higher standards they have shown they can reach and ensure cleaning efforts are visible and effectively communicated to those lapsed users that maintain doubts in future.

Face coverings - drive up compliance

In recent weeks there has been renewed focus on compliance with Covid-19 rules, for example with supermarkets committing to additional efforts to try to ensure all customers, unless exempt, wear face coverings. Our insight has shown consistently that transport users feel more needs to be done to make sure passengers are complying with the rules, especially on face coverings.

Our Travel during Covid-19 survey has shown clear room for improvement in passengers' satisfaction with the number of passengers wearing face coverings, especially on rail. Our [Transport User Community has argued](#) transport operators and their staff should do more to manage the behaviour of other passengers.

It remains critical those who are exempt from wearing a face covering are not disadvantaged by

any ramp up in enforcement or feel 'under attack'. But many passengers want to see more action to challenge the small minority who aren't exempt and are not sticking to the rules.

Further ahead – boosting the recovery

When the pandemic is behind us, public transport will need to attract passengers to return and try to change the new habits people have adopted. Confidence can be rebuilt by reducing barriers and encouraging passengers to experience for themselves the benefits of traveling by public transport again.

More flexible fares for less frequent commuters

There is a need for new fares and tickets that will suit the way passengers expect to travel in future and, when the time is right, help to rebuild passenger numbers and revenue. Our insight on changes to commuting patterns confirms the growing body of evidence that many commuters, especially office workers that make up rail's core market, will no longer be 'captive'. Increasingly



they will have some discretion about how often, or even if, they travel to work or stay at home.

It's clear there is a growing market for 'flexi-season' products to encourage these passengers to return to regular, albeit less frequent, commuting by public transport two or three days a week. Our [Fairer fares – future of rail commuting](#) report set out the case for these new products and we'll be publishing new insight soon providing more evidence of the need for and attractiveness of these options to commuters.

Offers and promotions to encourage lapsed users to return

Our insight has consistently shown that those people not using public transport perceive it to be worse, and strikingly less safe, than those who have been using it during the pandemic. Tackling the perceptions of these 'non-users', especially those who used to be regular public transport users, will be vital.

Positive communications, messaging and 'word of mouth' from trusted friends and family will all play a role, but the best way to change perceptions will be to draw people back onboard public transport so they can see for themselves. This means, when

the time is right, targeted offers and promotions to incentivise people to give public transport a try once again. This promotional push, coupled with clear information and plenty of support from staff to make sure their first journey is a good one, should help speed up the process of rebuilding passenger numbers and revenue.

Contact Transport Focus

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Transport Focus is the operating name of the Passengers' Council

Transport Focus is the independent consumer organisation representing the interests of:

- Bus, coach and tram users across England outside London.
- Rail passengers in Great Britain
- All users of England's motorways and major 'A' roads (the Strategic Road Network)

We work to make a difference for all transport users