



The Route Ahead: Getting Passengers Back on Buses

Qualitative research



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Introduction

Project context

- Every year, Transport Focus undertakes its Bus Passenger Survey (BPS) to establish satisfaction with bus passenger journey experiences
- However, the impact of Covid on travel and transport has reduced passenger volumes and limited opportunities for operators to make changes in response the last BPS
- This has created practical issues for running the BPS but also means the learning gained from it is likely to be less valuable to the industry than ad hoc insight work which can take into account both the changed environment and a raft of new questions that can shape how the industry can respond to passenger needs
- With this in mind, Transport Focus required highly exploratory qualitative work that provides a deep understanding of experiences, attitudes, perceptions and rational and emotional needs that influence whether people are willing to travel by bus currently and in the future
- This will be followed by quantitative work, to understand (amongst other things) the strength and prevalence of factors and solutions that will influence bus use and can potentially be leveraged by the bus industry



Research objectives

Overall, to gain a deeper understanding of bus passenger (current and lapsed) experiences, perceptions, and expectations of travelling during and after the Covid pandemic .

More specifically within that, the research objectives are to:

- Understand the experience of bus passengers during the Covid pandemic
- Understand the reasons why passengers that used to use buses are not currently doing so (lapsed passengers)
- Understand changes in passengers' attitudes to bus travel as a result of the Covid pandemic
- Identify the key actions and messages that will be required to encourage lapsed passengers to return to using buses
- Provide an indication of any anticipated changes to travel behaviour amongst bus passengers in the short, medium and long term



Overview of method and sample

- **Trios, pairs and depth interviews conducted via Zoom**
 - Minority conducted by telephone to accommodate access issues
- **All respondents asked to do a pre-task and post-task, detailing their journey habits and changes**
 - Most uploaded content to the Recollective platform (questionnaire, images, vox pops)
 - Some used alternative methods, again to accommodate access issues

Locations	Sessions	Representing overall	Including
Scotland (n = 34)	7 trios 5 pairs 3 depths	15 men, 19 women Spread of age categories: 14 -16, 17-19, 20-45, 46 -69, 70+ Spread of Socio Economic Group (SEG)	4 with disability (hearing, mobility impairment x 2, learning difficulties)
Wales (n = 34)	6 trios 6 pairs 4 depths	17 men, 17women Spread of age categories: 14 -16, 17-19, 20-45, 46 -69, 70+ Spread of SEG	3 with disability (visual, mobility x 2) 3 sessions in Welsh language covering 5 Welsh language speakers
England (n = 130)	24 trios 19 pairs 20 depths	63 men, 67 women Spread of age categories 14 -16, 17-19, 20-35, 36 -50 , 51-69, 70+ Spread of SEG	22 with disability (visual , hearing, learning difficulties, mobility and mental health, epilepsy, autism)
London (n = 32)	7 trios 4 pairs 3 depths	14 men, 18 women Spread of age categories: 14 -16, 17-19, 20-45, 46 -69, 70+ Spread of SEG	6 with disability (4 mobility, 2 mental health)

Locations	North	Mid	South
Scotland	Aberdeen	Stirling	Glasgow
Wales	Bangor, Colwyn Bay, Wrexham	Machynlleth, Aberystwyth	Swansea, Bridgend, Newport/Rhondda
England	Newcastle, Sheffield, Manchester, Liverpool	Birmingham/Black Country, Nottinghamshire, Leicestershire	Southampton/Portsmouth, Oxfordshire, Gloucestershire, Cornwall
London	Battersea, Brent, Brixton, Catford, Clapham, Chiswick, Deptford, Elephant & Castle, Feltham, Forest Hill, Fulham, Hammersmith, Harrow, Hayes, Lewisham, Peckham, Sidcup, Swiss Cottage, Thamesmead, West Hampstead, Whitton/Twickenham		

Fieldwork dates and locations

- Fieldwork was carried out between 14th and 18th December and then 11th January to 2nd February
- Pre Christmas locations were: Manchester, Liverpool, Newcastle, Birmingham, Bridgend, Glasgow, Oxfordshire, Cornwall and London, representing a spread of tiers 1 -3 (tier 4 was introduced post wave 1 fieldwork). Glasgow was at level 3 and Bridgend at alert level 3
- Post Christmas fieldwork was carried out in conditions of national lockdown within England and the highest level alerts/warnings in Scotland and Wales. It was also before the vaccine roll -out had reached many respondents (though most were enthusiastic about its imminent availability)

Tier	Broad overview/reminder of rules
1	Mixing with up to 6 people indoors and outdoors; hospitality open to 11pm (last orders 10pm), overnight stays allowed out of home
2	Indoor mixing only with own household or bubble; hospitality open but alcohol needs to be with a substantial meal
3	Meeting with other only outdoors in public places; hospitality closed
4	Stay at home unless essential; can only meet, in public, with one other person



Headlines

Headline take outs

Infection risk management is a dominant consideration affecting travel behaviours

- The public are following guidance to travel less but, beyond this, there is real concern that buses (as a public transport option) are a point of risk of infection for self or others
- Although only a minority of passengers are not following protection measures, there is a belief that non-compliance is a serious issue, particularly at times when buses are busiest

Knowledge of operator efforts is very mixed

- Current users are aware of measures that have been taken by operators to ensure their safety
- However, lapsed users are much less aware, and are influenced by predominantly negative content by word of mouth or from social / general media – directly feeding concern around non-compliance
- There is a key need for reassurance around safety on buses – communicated within the experience and via information in media spaces, from both government and operators plus other trusted voices, e.g. NHS

Taking into account all factors affecting travel behaviour, there are emerging clusters

- While current and lapsed users talk about similar motivations and barriers to bus travel, different typological clusters are emerging
- These clusters reflect different levels of impact on current travel and different propensity to use buses in future (in terms of speed of return and volume of resumed journeys) as well as different needs for reassurance

Age and rural vs urban are linked to some further nuances in audience consideration/needs

- The factors influencing current and lapsed behaviour were largely consistent between areas
- There are, as might be expected, sensitivities around age and risk
- Beyond this, rural areas do seem different from more urban/suburban in terms of how people feel about their services, and the alternatives that they might have to bus travel

Key findings

**Overarching observations of this bus
passenger audience**

Overall, passengers are not rejecting bus as a mode of travel

Most are waiting for a change of conditions to adapt their travel habits again

Very few think that they have changed their choice of travel forever

- A minority in this sample had purchased cars or adopted a new mode of travel such as walking/cycling
- However, most were waiting for 'things to get back to normal' at which point they expect to resume bus usage at a higher level
 - However, for some passengers, there are some indications of more permanent lifestyle changes that will change the shape and volume of their bus travel

I think I will go back to using after the pandemic. Though my mind -set and my shopping habits have changed a bit. I don't see myself being fully office based again.

[Female Trio, Lapsed, 20-35, C2D, Leicester]

Buses continue to represent a good option

- The advantages of bus travel are such that most want to 'go back to normal' when they can
- There are suggestions for how the service (and the buses themselves) need to adapt into the future for most comfort and confidence
- With some sense that behavioural changes (social distancing, sanitising) will persist after the pandemic

Once I've had the second dose I'll be going back out and back on the bus.

[Female Trio, Lapsed, 46-69, C2D, Stirling]

Yeah definitely I'll go back to uses the buses again... we get free bus rides anyway so what's the point in paying for fuel .

[Male Depth, Lapsed, 70+, C2, Manchester]

However, passengers have found it relatively hard to project to the future

Marked difference between pre-lockdown and lockdown fieldwork in ease of thinking ahead

Prior to Christmas 2020
(First phase of research)

- Some hope around returning to 'normality' at some point in 2021
- This helped respondents envisage a change in habits and behaviours, including travel

Hopefully with the vaccine it should be back to normal in half a year I'd say.

[Male Depth, Current, 17-19, C1, Hearing disability, Glasgow]

January 2021
(Second phase of research)

- The arrival of nationwide restrictions in England, Wales and Scotland altered the ability of respondents to visualise a return to 'normality' any time soon
- They found it harder to project how their own lives might pan out
- There were also increased beliefs that social distancing, face covering wearing and sanitising might become permanent requirements
- More worries about different strains and mutations than they have had in the past
- However, some more elderly and vulnerable lapsed users were also more likely to talk about potentially 'never being able to use public transport again' than they were before Christmas

I actually don't think I was taking it seriously enough, but now we've got this new wave and this new strain it's making wonder if I just need to try and sit the whole thing out until it's over

[Male Depth, Mobility, Lapsed, 51-69, D, Sheffield]

Note: At the point of fieldwork vaccine roll out was underway but scale, speed and confidence in programme not known

Much consistency in opinions of current and lapsed users

In this sample and at these points in time, impact of tier/level seemed marginal

Beliefs and attitudes appear to not be linked *strongly* to tier/level

- Both current and lapsed users had similar feelings towards the buses regardless of their area's situation
 - Most are trying to limit risk, and therefore travel
- Local tier does appear to impact overall attitudes but only slightly
 - Some users are more confident about their own safety when in a lower tier/level
 - However, this is a marginal benefit rather than reason to use buses more immediately for many
 - Some indication that a minority of lapsed users experimented with bus travel again over the summer when tiers were lower, but then lapsed again in the autumn
- For most in this sample, responses appeared largely driven by the national picture
 - If Covid prevalence is low in their area but increasing nationally, there is a tendency to think 'it's only a matter of time' before they have to worry, therefore sensible to act as though risk is more serious than it might actually be

I think in general people have been being more careful about the rules in winter, since we've been in higher tiers. I think in summer sometimes people took their masks off during the journey.

[Male Pair, Current, 14-16, BC1, Manchester]

Amongst both current and lapsed users, more differentiation on two demographic factors (but otherwise strong consistency)

Some differences show by age and urban versus rural

No real differences by ethnicity, gender or SEG, but attitude can vary across age

- Male and female respondents in this sample shared the same opinions and concerns regardless of their gender or ethnicity
- Higher Socio Economic Group (SEG) respondents were more likely to have other options to bus travel, but at the same time the push and pull factors for their use were similar to lower SEGs
- Age is more of a divider – the older are more likely to be worried for their own safety, while the younger feel safe but worry about infecting the vulnerable
- Those with mobility or other impairments in this sample did not appear different in attitude to the rest of the population – however, in some cases an underlying conditions have caused them to lapse

I initially didn't use the bus after lockdown happened, but when college started up I started to use it as much as I had done during the pandemic. I'm used to it again now.

[Male Mobility/Impairment Depth, Current, 17-19, C1, Glasgow]

Rural/urban is also a divide

- Overall attitudes to Covid are very similar, but respondents in the more rural areas were:
 - More likely to mention a specific additional benefit to using the bus – social aspects involving passengers and driver which they don't want to lose
 - This is a particularly strong driver to use and makes consideration around risk slightly different
 - More likely to be more relaxed about risk given remoteness from urban hubs / density
- In urban areas the buses are seen more as purely transport, and the fears of Covid are much more elevated

In Powys, I haven't felt terribly anxious about Covid, rates were really low during September to December. They are higher now, but I think I am more likely to get Covid from the children going into school than on the bus

[Female Trio, Current, 20-45, C1C2, Machynlleth]

In rural areas, social aspect to bus use is a specific reason to use

Bus usage is more than travel

- More likely to know the other passengers on the bus
- More likely to know the driver
- Both create a sense and experience of community sense which is currently being damaged because of social distancing and inability to talk easily with others on the bus This is ideally something that they don't want to lose in the future
- In remoter areas, for example Cornwall and West Wales, this leads to a more relaxed attitude to Covid as something that is unlikely to affect them personally
- However, the counter point is that rural passengers were more aware of strangers, and likely to be disproportionately concerned when they do see 'tourists' or 'strangers' that they might be a source of infection
- By contrast, urban and suburban passengers, unless specifically travelling with friends or relatives, likely to view the bus journey more exclusively as transport, and not want to engage with others on the bus



Mobility and other impairment respondents aligned closely with other passengers

Overall similarity to the wider current and lapsed user samples

- Respondents with mobility or other impairments generally were not different in attitude to the rest of the population
- Those with underlying conditions that could be affected by Covid more likely to have lapsed, and therefore to need strong reassurances before considering starting to use buses again

I don't use the bus at all now. I have home carers coming in, and I didn't want to mix with people who weren't following safety guidelines. I did have to use the bus once in an emergency, and people weren't using masks or social distancing, and I feared becoming a carrier

[Female Mobility/Impairment Depth, Lapsed 36-50, C2, Cornwall]

Some continuing users have actually seen improvements to their experience because of the pandemic

- Reduced bus usage has meant that some mobility impaired users have found it easier to move around inside the bus, and their common worries about being able to find a seat have reduced

As someone with a mobility issue which isn't that visible, because I don't have a wheelchair or anything...people used to crowd around be a bit too much before the pandemic...with the buses now less full, I feel like I've got more room to manoeuvre

[Female Mobility/Impairment Depth, Current, 51-69, E, Newcastle]

Overall, respondents with mobility and other impairments were attitudinally aligned to the wider sample.

Concessionary travellers were generally keen to return

Concessionary users value the freedom buses bring to them

Want to use the buses as before, but only when safe

- Concessionary users think that the buses give them freedom of movement and make journeys more affordable (and free)
- Before Covid this played a big role in getting them out of the house (particularly older concessionary users)
- Ideally, most would want to see buses continue to play this role in their lives post pandemic, and can't see any other way of getting the same advantages of convenience and affordability
- However, at the moment concessionary users are disproportionately affected by concerns over Covid's threats to their health, which means many are not going to travel more until they have been reassured that it is safe to do so – this has implications for how quickly they will return

Some older respondents have become more concerned as time has passed

- Some older concessionary respondents lapsed with the first lockdown, and were concerned for their safety from the start
- Others have lapsed later in the year, particularly as winter 2020 approached and they saw friends suffering from the new strain – this has brought the seriousness home more and made them more concerned/less likely to feel safe on a bus

I want to get back on the buses again, it was a big part of my life being able to leave my area, go and see my son, go to the seaside. But it's not safe at the moment and until it is I can't see myself doing any of those things at all, never mind on the bus

[Male mobility/Impairment Depth, Lapsed, 46-69, D, Swansea]



*It's not social any more.
Before we'd talk with friends,
but now we sit separately and
would have to shout across
the bus*

Female Trio, Current 20 -45, Machynlleth

Changes in user journeys

Journeys of current users have reduced in a number of ways

With each of these ways applying to most current users in the sample

Essential journeys are taking place but often with lower frequency than previously

- Travelling to work has remained constant for some and reduced for others if working pattern has changed
- Travelling to deliver items to elderly relatives or members of support bubbles
- Going shopping

I only use it for work now...I used to visit people on it and do shopping, but now I only use it for work.

[Mixed Trio, Current, 51-69, C1C2, Leicester/Nottingham]

Journeys for social and leisure purposes have ceased

- Need for journeys has stopped in lockdown
- Pre lockdown most claim to have been largely 'following the rules'
- There was some more social/ discretionary usage in the high summer but in general they have been avoiding public transport if they don't need to use it

I don't travel about aimlessly now. I'll just use them twice a week to visit my brother who's in my social bubble. I can't park my car in the area he live .

[Male Depth, Current, 70+, C1, Walsall]

Most are travelling alone most of the time, which is a new habit

- Generally travelling alone most of the time, i.e. not with family or friends where they might have done this previously
- Driven by a belief that this is helping to limit potential exposure and keep their families safe
- When travelling on a bus with spouse or children generally keep this to short and unavoidable journeys, e.g. to medical centres, etc..

I have nowhere to go now everything's shut.

[Mixed Trio, Current, 20-45, C1C2D, Aberdeen]

Although there is some variation by age, for current users in general there is an aspiration to getting back to using buses as they used to. Given the current state of the pandemic, they see little change in the short-term. However, with falls in infection rates and perceived risk they expect their use to increase as more of the discretionary journeys become possible again.



We're just not using the buses as much now because the need has gone

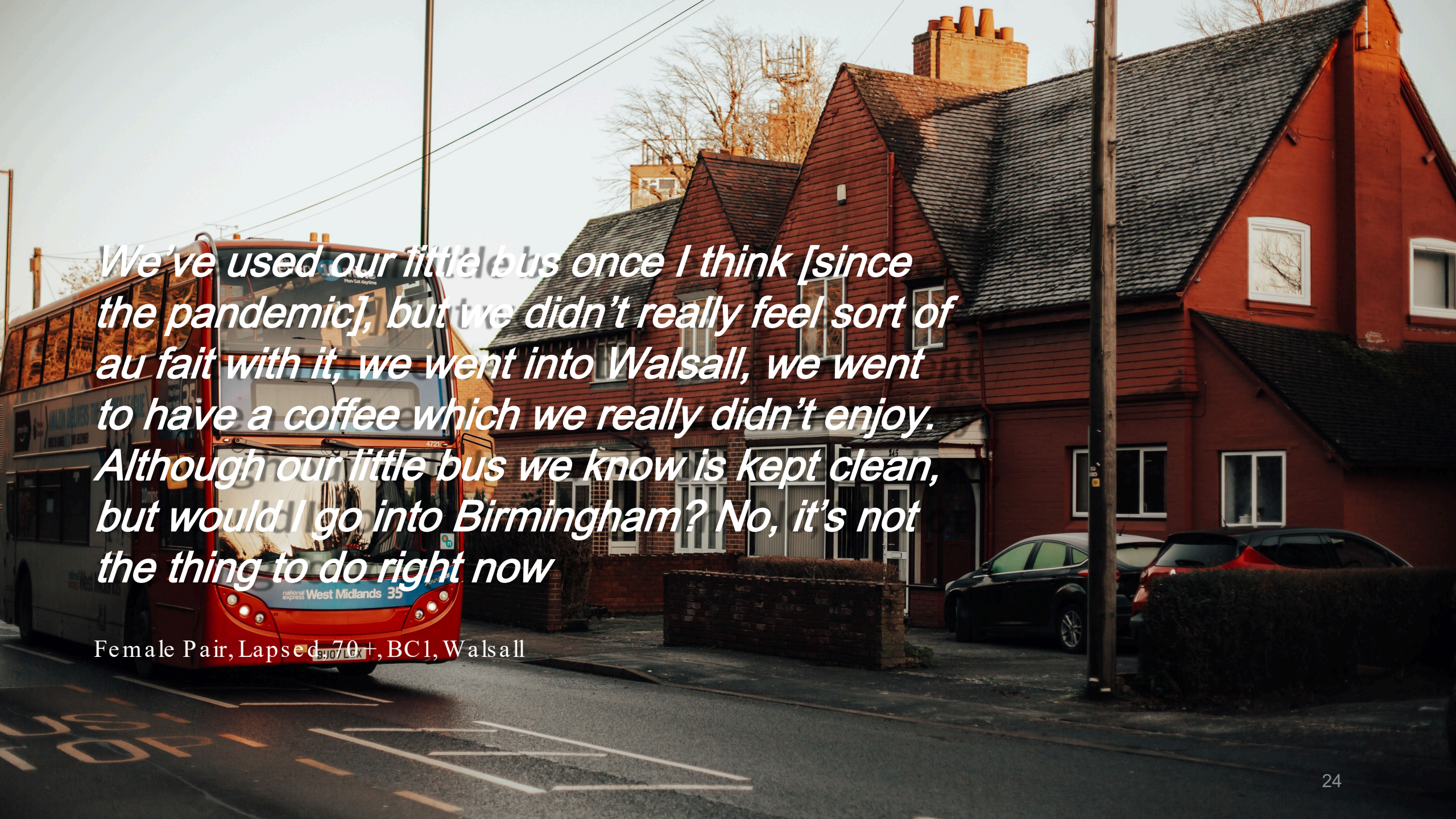
Male depth, Current, 70+, D, Sheffield

Lapsed users varied between those who have stopped completely and those who have 'stopped and started'

There is wide variation in terms of whether usage will restart

Essential journeys no longer exist	<ul style="list-style-type: none">• For some, key previous journeys have ceased through circumstantial changes (e.g. working from home, furlough, loss of employment)• Others have removed previous journeys from their lives by finding an alternative solution (e.g. delivery rather than shopping)• Both <i>could</i> change / revert in future but this will vary and is uncertain	<p><i>I stopped mainly because school and the gym closed. Everything's online nowadays...there's nowhere to go.</i></p> <p>[Male Pair, Lapsed, 14-16, C1, Leicester]</p>
Non-essential journeys temporarily halted	<ul style="list-style-type: none">• As with current users, journeys for social or leisure purposes are not happening currently• Some lapsed users did reinstate their usage (briefly) in the summer months but ceased again as infection rates rose and the weather worsened into the winter	<p><i>My sister drives so sometimes she gives me a lift</i></p> <p>[Female Mobility/Impairment Depth, Current 17-19, C1, Current, Gloucestershire]</p>
Found alternative transport method	<ul style="list-style-type: none">• A range of lapsed users have changed their mode of transport to something which currently meets needs better (taxi, own car, bike, walking, getting a lift)	<p><i>I've been scared for my health. Also as a support worker I'm scared for the health of the people I work with. I don't want to infect them</i></p> <p>[Female Trio, Lapsed, 20-45, C1C2D, Aberdeen]</p>
Fear using public transport	<ul style="list-style-type: none">• Many lapsed users have ceased primarily because of health fears – they do not think travel on public transport is worth the risk to themselves or vulnerable loved ones who they live with.• Some in this group are unlikely to return until the pandemic is essentially over, even with the vaccine, and are worried about the new strains	

There is a contingent of lapsed users who expect to resume bus use as soon as their need to make the journey exists again. However others have made what they believe to be more permanent changes

A red double-decker bus is parked on a street in front of a row of red brick houses. The bus has "national express West Midlands 35" written on its side. The houses have dark roofs and white window frames. A utility pole is visible on the right side of the street. The scene is captured in a cinematic style with soft lighting.

We've used our little bus once I think [since the pandemic], but we didn't really feel sort of au fait with it, we went into Walsall, we went to have a coffee which we really didn't enjoy. Although our little bus we know is kept clean, but would I go into Birmingham? No, it's not the thing to do right now

Female Pair, Lapsed, 70+, BC1, Walsall

Awareness of what has been done to ensure safety on the buses varies

Knowledge gap between current and lapsed users

All aware that guidance is 'essential journeys only'

- Regardless of other measures, both current and lapsed users feel that they should only be making journeys if it is necessary
- Consequently their main responsibility is to limit use
- Because the government has said 'don't make unnecessary journeys' there is a role for government to emphasise that buses are safe – and for operators to show what they're doing to make this the case – combined this may boost trust

If you don't need to travel then you shouldn't be on the bus

[Male Pair, Lapsed, 14-16, London]

Current users more aware of additional measures around safety

- Current users see changes / measures both on and off the buses, and have adapted to the new requirements

You do see the signs on the buses – it's clear enough what you should do

[Male Trio, Current, 17-19, C2D, Portsmouth/Southampton]

Some lapsed users have awareness of these additional measures

- Have experienced the new measures during rare bus travel
- Believe that they aren't up to date on latest requirements and would want to have communication from the bus companies (via advertising) to tell them what safety steps have been taken

I've seen on Facebook. Someone gets on and shuts all the windows. They're ignorant.

[Female Trio, Lapsed, 46-69, C2D, Stirling]

Other lapsed know little safety measures

- Some who have not been on a bus since March 2020 don't know what steps have been taken and their opinions are coloured by word of mouth from friends and social media - likely to be negative towards buses and as a result, the risks are assumed to be very great

Current users are generally aware of what they need to be doing (and aware when others aren't complying). Some lapsed users are much more likely to have a very negative (and uninformed) view of current bus safety, because the reality has not been communicated to them

Sources of information for lapsed users' views of bus travel vary

Strongly influenced by word of mouth for most in this sample

Some claim to have seen materials from their local bus operator and councils	<ul style="list-style-type: none">• Notices at bus stops• Adverts on the side of the buses themselves• Mailshots to their homes• However, once people have stopped using buses they also stop taking so much of an interest, so information isn't taken in from vehicles/stops
Some have seen social media from operators	<ul style="list-style-type: none">• A few claimed to have seen social media posts from operators about the safety measures being adopted in the last year• Sense that there has been less communication since summer 2020 and some desire to see what the situation is now• Not going direct to bus operator websites or social media pages in the normal course of their day so though interested they need comms to be pushed to them
Evidence of own eyes	<ul style="list-style-type: none">• Those who haven't seen anything official think that they've seen buses 'looking full' or busy bus stops, which sets expectations that things are going to be busy/unsafe on the buses themselves
Third party social media and word of mouth	<ul style="list-style-type: none">• A lot of information being circulated in community websites and by face to face conversations• Includes much hearsay particularly around poor behaviour on the buses from passengers, overloading, etc., which is believed because lapsed passengers have no benchmark to measure it against

I saw an advert of them on a bus doing social distancing and you have to wear a mask... I'm sure it was on the TV or it might have been on social media, it was ages ago in August or something

[Female Mobility/Impairment Depth, Lapsed, 20-35, D, Manchester]

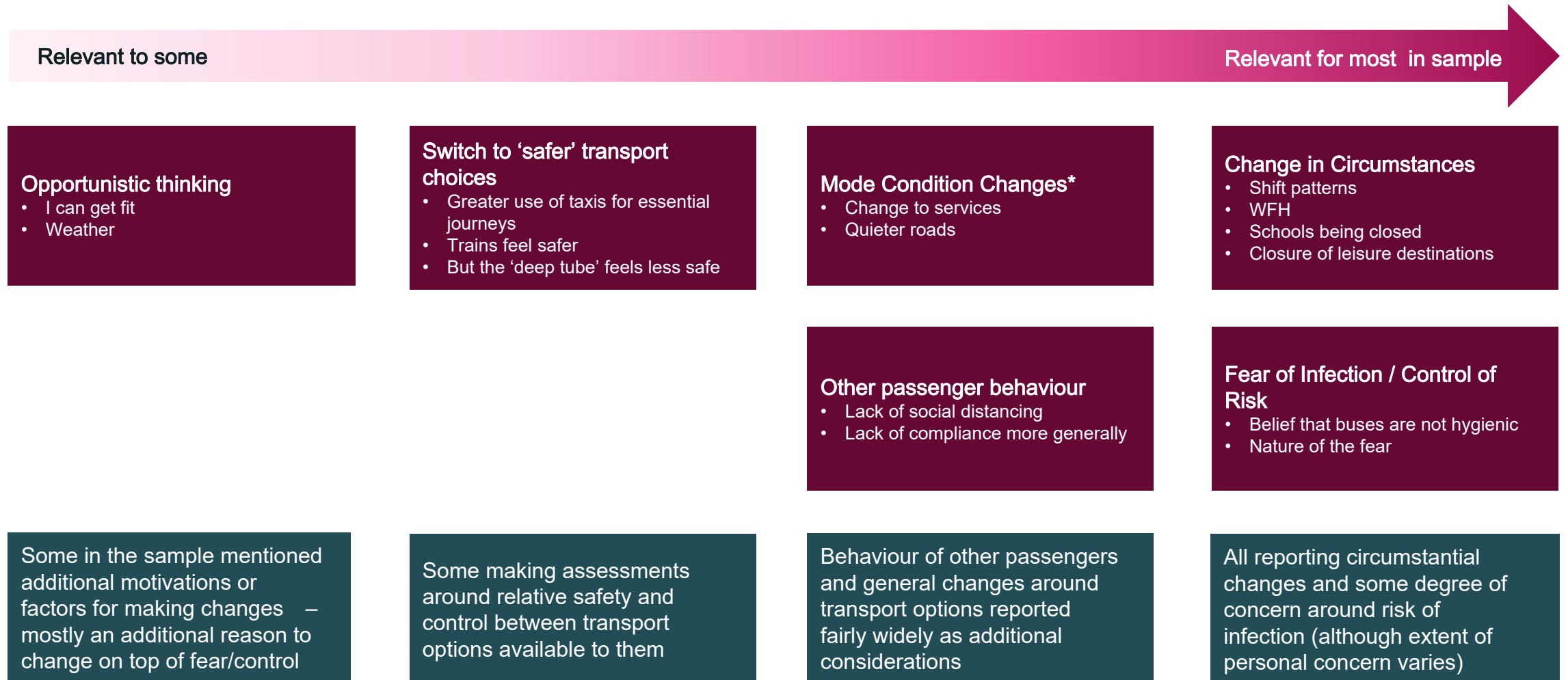
Most of my information I should say comes from friends who have to take a bus...there are usually complaints about people not wearing masks and sometimes they're worried about the fact that the driver isn't wearing a mask...people don't pass on optimistic comments

[Male Pair, Lapsed, 70+, London]

Some official information around safety measures is cutting through to lapsed passengers, but there are unofficial sources which paint a more negative picture and alter perceptions of risk and safety for those with no personal experience to check it against

The main drivers for change are shared across current and lapsed users

There is a clear hierarchy of factors in terms of impact on the individual



Change in circumstance

The most significant factor is whether the journey needs to be made at all

Shift patterns

- Change in shift patterns which no longer fit in with bus times (particularly in rural areas) so removing buses as an option
- Can mean travel now needs to be at a different time, or makes other transport choices viable

Working from home

- Removes the need to commute every day
- Likely to persist in some form as there is a belief that Monday-Friday workplace attendance may now be a thing of the past
- More impact on BCl sample or those whose jobs mean they can work from home , some expect this to continue

Schools being closed

- Removes need for children to travel (and for parents of younger children to accompany them)
- Likely to change naturally as schools reopen

Closure of leisure destinations and non essential retail

- Closure of pubs, bars, sports grounds, leisure destinations and non essential retail has meant that this form of discretionary travel has ceased
- Potential to change as these destinations reopen
- Greater use (by some) of delivery options and home shopping – in-store browsing is valued and people are keen to return to it, but volumes of home shopping likely to remain higher post pandemic than before

From 27th of February, I was sent home, so I've been working from home. It's only been the last three months that I've been going into the office once or twice a week. I like going into the office. (...) I've picked the times when I want to go into the office, so evenings and weekends when it's not so busy.

[Male trio, Current, 5 1-69, C2, Liverpool]

It's just the fact that, now things are closed, you've got less and less point of going to places like Cardiff. You won't be able to go for a few drinks because pubs are closed .

[Mixed Trio, Current, 17-19, C2DE, Bridgend]

Circumstantial change has had an impact across the sample, though different segments have been affected by different elements. It's likely that the first resumptions will be those around work and education, with discretionary travel resuming as perceptions of safety (both of buses and of the wider pandemic situation) improve.

Fear of infection/control of risk

For lapsed users, this is the primary driver for many to stop using the bus

Belief that buses are not hygienic

- Both current and lapsed users saw buses pre pandemic as 'grubby'
- This has caused the most fearful to lapse completely and some users to limit their usage to necessary travel only

Nature of the fear

- Initially this was about surfaces (when face coverings weren't mandatory) – expectation is that buses should provide sanitiser, but many bringing their own because they don't want to touch the communal dispensers
- As face coverings became compulsory this cued airborne transmission – causing a further cohort of travellers to lapse (because risk seems higher than just surfaces)
- Precise nature of the fear splits by age:
 - Older passengers (and the vulnerable more broadly) tend to be concerned for their own safety
 - Under 50s less concerned for their own safety but don't want to spread the virus
 - Under 30s much less likely to be concerned for their own safety but don't want to pass it on to vulnerable elderly relatives

One of the biggest ways to get Covid is by being on a bus. You're at more risk.

[Male pair, Current, 20-45, C1, Aberdeen]

When it's quiet, it's a relief. When it's busier I'm a bit anxious – you can't control your environment when it's busy

[Mixed gender trio, Current, 36-50, BDE, Cornwall]

I've stopped using them because I'm scared. They're not clean, the ventilations poor, you don't know what you're breathing. I don't like wearing my mask because my glasses steam up

[Male Mobility/Impairment Depth, Lapsed, 51-69, E, Sheffield]

Perceptions of risk, and the fear that such risk creates, have caused two waves of lapsing – when the pandemic first started and then when face coverings became compulsory. While many lapsed users claim that they won't resume bus travel until they feel that the general danger from Covid is lower, others can be influenced positively by communications around steps operators are taking to keep bus passengers safe. Current fear is more about airborne threat, but respondents have been conditioned by early adoption of sanitizer to still be worried about surfaces as well so need reassurance on both cleanliness and enforcement of social distancing and ventilation.

Other passenger behaviour

A strong factor in the decision of many to lapse from bus use and a frustration for current users

Lack of social distancing

- Respondents from more urban areas (both user and lapsed) report having travelled on buses that they felt were over capacity – this has been the trigger for some to lapse
- Don't like having to pass closely by people while boarding and leaving

I got on a bus and it was full. It kept getting fuller and I thought there were too many people on to be safe

[Male Mobility/Impairment Depth, Lapsed, 51-69, E, Sheffield]

Lack of compliance

- Frequent complaint from both users and lapsed across locations that passengers board wearing their face coverings and then pull them down when they have sat down – contributing to a sense that safety is being compromised
- Some sense that this is a minority of people, but also that if you are impacted then the fact that this is a minority is not reassuring
- Added to this is a belief that the drivers can't enforce the rules anyway – all would like to see it, but don't believe it would happen (perceived lack of respect for bus drivers from rule-breakers and sense that they would be in a difficult position)

A lot of people don't care...just kind of sit wherever. People don't care to clean their hands, it almost makes me feel resentful about doing it because no one else...

[Female Trio, Lapsed, 20-45, C1C2D, Aberdeen]

This is an area where lapsed passengers require more reassurance, and current have some concerns



*You want to stay away from
people more...but some
people don't follow the rules*

Female Pair, 14 -16, C2D, London

Mode condition changes

Changes in how transport options perform can affect how bus services are perceived vs the alternatives

Change to services

- No longer convenient to travel
- Perception that some services are even busier (because of reduced capacity) driving unwillingness to wait for the bus and discover that they cant get on (all demographics)

Currently the buses aren't very regular...that's a big downside.

[Mixed Trio, Lapsed, 20-35, C1C2D, Newcastle]

Quieter roads

- As traffic reduced this made it possible to use cars for driving on some routes – feels safer, fewer traffic jams and easier than pre pandemic to find a parking space
- Respondents in this category are resigned to switching back to the bus when traffic levels (or their perception of them) return to pre-pandemic norms

My workplace is much emptier now, so there are free car parking spaces available. Covid gave me the excuse not to get the bus

[Male Trio, Lapsed, 20-35, BC1, Gloucestershire]

Mode condition changes are likely to be a key driver to push previous bus users back onto the buses

Switch to 'safer' transport choices

Perceived lower risk levels of other transport modes vary vs buses but are often a reason to use

Greater use of taxis and lifts for essential journeys

- Particularly for shopping and visits to health appointments
- Risk feels easier to control – because only have to worry about compliance from self and driver, and can keep the windows open
- Taxis more expensive but fewer journeys overall means can be afforded

I feel safer in a black cab because there's nobody else in and no -body is touching you

[Female Trio, Lapsed, 46-69, C2D, Stirling]

Trains feel safer than bus

- Some belief that trains are safer – because higher capacity spread over a longer space, and have a member of staff on board to enforce compliance
- Some substitution of train for bus by those with the option, e.g. the overground in London

I'd feel safer in a train than in a bus because buses are confined, whereas the train has more carriages and people tend to spread out a bit more.

[Mixed trio, Lapsed, 36-50, C1, Liverpool]

But the deep tube feels less safe

- Some London respondents have switched from deep tube lines to Overground or bus because it feels safer than the 'stale air' below ground

The tubes are really packed with passengers – it's not a good experience

[Male Mobility/Impairment Depth, Current, 14-16, E, London]

Walking and cycling

- Although somewhat dependent on journey type, journeys that are possible by walking or bike adopted as an alternative

I walked to the centre of Stockport at lunchtime for 30 minutes rather than get on the bus which was very crowded, I didn't want to get on with all those people [Trio, Lapsed, Mixed, 17-19s, C1C2, Cheshire East]

These transport choices are likely to revert back to the pre-pandemic norms as Covid subsides, but at the moment are clear drivers for changed behaviour across the sample.

Opportunistic thinking

Has an impact for some, but both a push and pull factor for bus use

I can get fit

- Replacement of bus travel by walking or cycling for the perceived health benefits
- Reduction in perceived risk of travelling on public transport

I got used to just walking or cycling for the shorter journeys

[Mixed gender trio, Current, 20-35, BC1, London]

Weather

- Strongly liked to the above
- Some made changes to their travel in the good weather which they then dropped as we went into Autumn winter
- Others actually upped their bus usage over the summer because they felt safer in the better weather – less Covid around, fewer people coughing etc.. with seasonal viruses, generally better impression of the overall health of people - these people tended to lapse again into Autumn and winter

I think the summer would be better because I think people will be at a window so whereas I seem to think in the winter people would have the windows closed because they'd be cold and I'd feel that, yeah, it wasn't circulating. I feel more comfortable at non rush hour times when the best would be less busy.

[Female Pair, Lapsed, 51-69; C1, Oxford]

There is a feeling that this pattern might repeat over 2021, with some winter users lapsing again with the better summer weather making walking/cycling more attractive, and winter lapsed starting to use again as their perception of risk diminishes

Attitude trajectories

Overall, multiple forces are driving current behaviour change and future choices for individuals



Basically I'm not getting on a bus unless I have to

[Male Mobility/Impairment Depth, Lapsed, 51-69, E, Sheffield]

I'm not worried about myself, but I don't want to give it to someone else

[Trio, Current, 17-19, Portsmouth/Southampton]

I think it's probably ok if you're careful, but my parents won't let me

[Male Pair, Lapsed, 14-16, London]

Inevitably, individuals' choices and what they expect to happen in the shorter and longer term is 'unique'; however, this sample fell into broad clusters based on the strength of their drivers (motivations and barriers) to readopting bus travel at a higher level in the future

Clusters are emerging within current and lapsed passengers

Given link to overall concern, speed for resuming travel and needs for reassurance vary

	Current Users			Lapsed Users			
Cluster	Waiting to resume normality	High concern and ongoing caution	Will use but permanent reduction in bus	Waiting to resume normality	High concern, need reassurance for change	Highest concern, reassurance unlikely	Permanent changes made to mode
Demographic in this sample	Any, but in good health	Any but especially C2DE with no other transport options	Any but especially BC1	Any, but in good health	Older, Mobility, C2DE, also children of worried parents – who take on some of those worries	Older, more vulnerable any age	Any, but especially BC1
Location in this sample	Any	Any	Any but particularly suburban and rural where bus transport already more limited	Any	Any	Any	Any
Current change in bus usage	Have stopped making journeys that have ceased to exist but otherwise unchanged	Making bus journeys because they have no other option – substitute where they can	Have replaced some bus journeys with other options – cycling, have purchased a car	Have stopped making bus journeys simply because the need has gone	Have lapsed (or been told to stop bus usage by parents)	Have completely stopped and trying to limit any travel at all	Have lapsed and replaced with other transport options (e.g. purchased a car)
Attitudes re Covid	Pragmatic, concerned but don't let it stop them	Very concerned, and keen on all safety measures	Pragmatic – think some journeys are worth the risk	Pragmatic, concerned but don't let it stop them	Pragmatic, expect vaccination to help	Very concerned about their personal health and safety	Pragmatic but have replaced bus journeys with WFH or other transport
Anticipated change in the future	Expect to resume all previous journeys as restrictions lift – will be the first returners	Won't return to full use until reassured on safety, do n't expect a quick return to old usage patterns	Believe they have permanently replaced some bus journeys but will use bus as needed in the future	Expect to resume all previous journeys as restrictions lift – will be the first returners	Want to return and value bus services but need reassurance on safety before willing to resume	Think it is unlikely to ever be safe enough to return to public transport, have either replaced bus or believe their future travel is limited to the local area	Think return to buses unlikely as they have changed their behaviours and routines – not anti bus but have moved on from them



Anticipated changes to behaviour in the short, medium and long term

	Current Users			Lapsed Users			
Cluster	Waiting to resume normality	High concern and ongoing caution	Will use but permanent reduction in bus	Waiting to resume normality	High concern, need reassurance for change	Highest concern, reassurance unlikely	Permanent changes made to mode
Short Term	Will resume other journeys as soon as allowed	Likely to continue with essential journeys only	No change to behaviour	Will resume their journeys as soon as those journeys exist again	No change to behaviour	No change to behaviour	No change to behaviour
Medium Term	Return to full usage as soon as allowed	Will assess any resumption on safety grounds	Potential to return to bus if other options become less attractive (e.g. traffic levels make parking private cars difficult again)	Return to full usage as soon as allowed	Will assess any resumption on safety grounds	No change to behaviour	Potential to return to bus if other options become less attractive (e.g. traffic levels make parking private cars difficult again)
Long Term	Return to full usage as soon as allowed	Likely to get back to full bus usage but only when it is safe to do so		Return to full usage as soon as allowed	Likely to get back to full bus usage but only when it is safe to do so	Could be persuaded to return if the risk of Covid is removed	

There are potential behavioural changes for some segments over the short, medium and long term but most impact will be driven by the overall situation regarding the pandemic

As we return to normality

Irrespective of cluster, there is alignment on expectations around the experience of bus travel in the relatively near future

Bus capacity

- Current users have become accustomed to the levels of distancing and capacity on buses (and see some benefits like being able to get a seat)
- Likely to be concerned by gradual increases in capacity but just from a sense of overall numbers rather than any concern that returners won't know how to behave
- Lapsed users similarly likely to need reassurance that capacity increases are safe before seeing this as anything other than another reason not to use the bus

That's a difficult one, because you get used to your own space, and that being what keeps you safe

[Male Trio, Lapsed, 46-69, BC2, Swansea]

Sitting next to strangers

- Linked to the capacity point, but the idea of not having to distance from other passengers at the moment is alarming across regions and tiers
- Demand for more single seats on buses into the future so that this can't happen

I don't know how I'm going to feel when you can sit next to someone again because you don't know if they've been doing the right things

[Female Depth, 70+, C1, Wrexham]

Although all want the situation to return to 'normal', most respondents currently find it difficult to envisage a time when they will be happy with increased capacities and having to sit next to strangers. Rationally they know that the point will come when these changes are safe and have to happen, but they have become acclimatized to the safety cues of not sharing space with others.

Current user experiences and needs

The current user experience and wants

At the bus stop

Planning in advance

- More urban users have more choice of services and more likely to have shelter at the bus stop – can afford to turn up and wait
- Rural users have fewer options and (in this sample) less shelter – so only go to the stop when they know a specific bus is due

At the bus stop - information

- Preference in urban areas for stops with screens showing when the next bus is due and how many minutes away
- Timetables are useful - many now checking those on their phone
- Display of Covid rules for bus use is useful, and most think should be standard at bus stops for clarity and reassurance

Social distancing

- Generally observed by waiting passengers, but can be difficult when there is limited shelter, or when multiple bus stops are in the same place

I know that I need to get a certain bus – it's a 20 minute walk to the stop and there's only one an hour so I'm not going to go there just to hang around – it's freezing in the winter

[Male Trio, Current, 17-19, Portsmouth/Southampton]

The queuing could be a bit more ordered. Like the supermarkets where you're called in one by one.

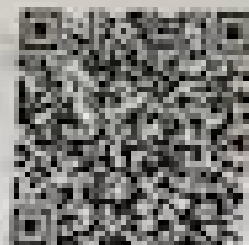
[Female Trio, Current, 17-19, DE, London]

As the gateway to usage, bus stops play an important role in setting expectations about the service. This seems to work well in urban areas, but bus stops with poor shelter and infrequent services set barriers to making the bus an attractive option.

Some bus timetables are being regularly updated in response to the current pandemic; we are therefore unable to show timetables for all services as they are subject to change

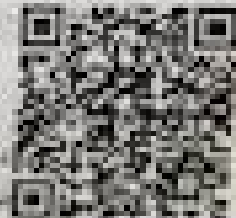
For up-to-date timetable information please visit Traveline (traveline.info) or Travelwest (travelwest.info).

Alternatively, you can scan the QR code to access the live arrivals for this bus stop - inserting the name of the stop when prompted.



Where available please also refer to the bus stop Real Time Information boards.

For more information please scan the QR code, select which level you need and search for the service required. The timetable can be found under the "View options" tab.



I feel relatively safe as everyone is following the rules

Female Pair, Lapsed, 14 -16, C1, Gloucestershire

WEST OF

To report damage at this stop, please contact the relevant council:
South Gloucestershire 01275 298001 council_connect@gloucesters.gov.uk
Bristol 0117 922 4454 council@bristoltransport.gov.uk
South Gloucestershire 01454 848004 council@bristoltransport.gov.uk

travelwest **traveline south west**

Kimberley Road

*"I like the ones where there's
a display so you know how
long you'll be waiting"*

Male Trio, Current, 17 -19, C2D, Portsmouth and
Southampton



We've got a new electronic display in Machynlleth – it's good but when the timetable changed it didn't keep up with the changes

Female Trio, Current, 20 -45, C1C2, Machynlleth

2709 0106

BUS STOP
Kilney Health Centre

Route	Time
1	2
2	17

Route	Time
2	2
1	13
2	19
1	33

“If you’ve got to be waiting there for a while, and it’s raining, and the glass is missing, then you’re going to start thinking about other options”

Male Lapsed Pair, 14 -16, D, London

The current user experience and wants

On the bus

Ticket purchase

- More and more use of contactless payment, passes and preference to buy in advance across ages and SEG – but this tends to be more about speed of boarding/time at stops rather than being driven solely by hygiene/cash handling concerns
- Some younger respondents would also like to be able to book/reserve seats as on trains – though most think this wouldn't be practical
- However, the most disadvantaged and some others with personal preferences want cash to remain an option, and others want this for older people who they think are more likely to use cash

With the card machines not working...it makes it worse for Covid risk because then you have to go into a corner shop to do it. That's why I started paying on my phone.

[Female Trio, Current, 17-19, DE, London]

Interaction with the driver

- Limited to thanking them when disembarking

I'd like separate entrances and exits I think. Before I stopped last summer I was worried by all the people standing around the doorway at the same time

[Male Mobility/Impairment Depth, Lapsed, 46-69, C2 Swansea]

Getting on and off

- Most think it is difficult to see how this could be improved, although the ideal would be for separate entry and exit doors so that passengers were not flowing past each other at each stop

Entry to and exit from services is generally working well through the pandemic

The current user experience and wants

During the journey

Passing the time

- As before the pandemic, this is an option to read, listen to music, and think
- There can be concerns about the behaviour/levels of compliance of fellow passengers, which can make the journey induce anxiety

You just relax don't you ? Switch off, or try to, and hope everyone else behaves

[Male Pair, Lapsed, 14-16, D, London]

Information on display

- General rules on behaviour – though these are frequently not read because passengers are 'keeping our heads down'
- Typically displayed near the driver
- Noting else noticed other than tape, etc., cordoning off individual seats


I've seen some posters and warning as you get on the bus. Just reminding you why you need to wear a face mask.

[Mixed Trio, Current, 5 1-69, C1C2, Leicester/Nottingham]

Passenger distribution

- Generally clear which seats may/may not be sat on, however urban users more likely to suggest that this is not always enforced, which is another source of worry/concern

During the journey most are reassured by the behaviour and rules on the bus, but at busy times and on evening services there is more of a feeling that rules aren't always being enforced



I feel frustrated if people sit too close to me, and I always wear a mask and sanitise afterwards

Female Trio, Current, 20 -45, C1C2, Machynlleth

*There can be too many
people on board at busy
times*

Male Pair, Lapsed, 14 -16, D, London

What constitutes more satisfactory journeys during the pandemic?

In general (within pandemic and otherwise):

- The bus being on time
- The journey being affordable
- Beating the traffic / not having to sit in traffic jams in a private vehicle
- Getting closer to the destination than can in a private vehicle
- Don't need to worry about parking
- Can get a seat

Additionally for the pandemic:

- Will get a seat (no standing currently)
- Good ventilation
- Less crowded
- Obvious signs of cleanliness
- Observance of Covid regulations (face covering wearing)

At present, many of the more 'normal' advantages of bus travel remain – there are four other key attributes which have emerged over the pandemic and which, for the less risk averse / worried, actually can make journeys more satisfactory than before

What constitutes less satisfactory journeys during the pandemic?

In general (within pandemic and otherwise):

- The bus being late
- The bus not turning up at all
- Not being able to get a seat / having to stand
- Very crowded at rush hour (worse than just having to stand because all crammed together)
- Other passengers being disruptive – especially on late evening and night services

Additionally for the pandemic:

- The buses being already at capacity (so can't / don't stop)
- Not being able to catch the desired bus at the desired time
- Lack of hygiene
- Lack of observance of the Covid regulations
- People not sitting where they're supposed to
- Bus being fuller than it's supposed to be
- Not wearing face coverings / not wearing face coverings correctly
- Bus being cold because all the windows are open

The pandemic has added additional factors which can make a journey unsatisfactory, all related to real or perceived safety issues

Potential measures that might encourage bus use

Overall, current and lapsed users shared a view of the future

in terms of what is wanted and needed and how external factors might influence choices

Improvements to the buses themselves

- During the pandemic this is primarily about enforcing the rules and maintaining hygiene
- Post pandemic there is an expectation that some of these improvements will need to be maintained

Getting the message out

- Lapsed users want the same improvements as current users, but they don't currently see them – need to clearly communicate what is being done via local and social media

Tiers / levels and vaccination will have the most impact on mindset

- When tiers / levels rise in an area that is a cue to be more careful – tiers / levels lowering does not cause relaxation as quickly
- Vaccination is seen as a big step forward, but worries about transmission mean that many don't think their mind-set will change until both they and most other people have had the jab

Post pandemic, there are key expectations from a bus service

- Punctuality / timekeeping seen as more important than simply more services
- Little interest in any positive health benefits to bus travel
- Low/zero emissions buses are important to some people but most are more concerned with timekeeping and availability

Improving the current journey for current users

Range of suggestions spanning provision, behaviour and information

On bus – customer

- Customers to be reminded of the rules and challenged by staff if they do not comply

On bus – furniture

- All openable windows to be open / better ventilation
- Better heaters to allow windows to be open through the winter
- Stop buttons that can be activated without being physically touched
- Hand sanitiser and wipe dispensers to be available on all buses and regularly checked / re filled

On bus - signage

- Signs giving permission to open windows
- Clear communication of rules and expectations around behaviour

Recently the bus driver had a bit of a fight with someone, he told her to shut the window and she wouldn't. She said was a key worker and needed it open.

[Mixed Trio, Current, 5 1-69, C1C2, Leicester/Nottingham]

There's sanitiser on some of the buses, but not for both companies.

[Mixed Trio, Current, 20-45, C1C2D, Aberdeen]

There are suggested improvements to bus layout, what is provided on the bus, and reminders of what the customer can do to keep themselves and other passengers safe

Improving the current journey for current users

Range of suggestions spanning provision, behaviour and information

On bus – staff

- More obvious cleaning of the bus at major stops throughout the day
- Suggestion that the smell of disinfectant is a powerful cue to suggest that cleaning is happening regularly
- Conductors / second staff to enforce compliance amongst passengers

Maybe the bus drivers should be supported by someone when policing the rules? It must be hard a lot of people can be confrontational

[Female Trio, Current, 46-69, C1DE, Bangor]

Off bus – information

- Information about the rules and safety practices that have been adopted by operators to be displayed at bus stops and on the side of the buses themselves

I don't think it's about having more services, with the reduced capacity it's about having more buses on the service

[Trio Lapsed, 46-69, Swansea]

Off bus – service provision

- More buses at peak times so that they are sure of getting on at a time that they want to travel
- Use of Oxford Buses style planner either on the web or an app to show when services might be less busy and help make decisions around what time to travel

Demand for demonstrable proof of cleaning to reassure that it's happening. Clear statements of procedures displayed at bus stops to catch the eye of lapsed passers by, and adoption of technology where possible to make it easy to plan a safe journey and keep risks minimised

Improving the current journey for lapsed users

Similar requirement to current users, but need it to be communicated

All current user points are relevant

- While they can see the sense in many of the improvements suggested by current users, many lapsed think that they will not return until the pandemic has passed

I'm not getting on a bus until all this is over. My wife and I are too vulnerable. I think we might never use public transport again

[Male Trio Lapsed, 46-69, BC2, Swansea]

Need for a communications campaign

- Some have lapsed because of their own experiences of overcrowded services or lack of enforcement in the early part of the pandemic.
- Others have had their views reinforced by word of mouth from friends or social media
- Stories of bus drivers dying had traction at the beginning of the pandemic and have set attitudes for some lapsed customers

I've heard nothing about how people should be using public transport – if there are rules, or they're doing something to keep you safe then it should be on the TV or the local newspapers

[Male Mobility/Impairment Depth, Lapsed, 51-69, E, Sheffield]

There is demand from some of the more persuadable lapsed users to know what safety steps and measures operators are taking – they would expect to see this in the local print and radio outlets.

Area tier/level changes have an impact on usage

However, there is more effect in a negative direction

Likely to make a significant positive difference	Likely to make a negative difference	Little effect on most
A large number of people in the country had been vaccinated	Change in tier/level status for your area which meant higher restrictions more generally	There was a change in tier/level status for your area which meant lower restrictions more generally
Covid was generally no longer a significant risk	You were aware that the Covid infection rate on your area was higher than average	You were aware that the Covid infection rate in your area was lower than average
	You were aware that the Covid infection rate in your area was rising	You were aware that the Covid infection rate in your area was falling

Area changes are more likely to have no effect, or a negative effect for most until the perceived threat from Covid has receded/been reduced

Tiers/levels and infection rates

Rising incidence or tier level is a cue to limit travel, but there is a lag in terms of how quickly declining incidence/tier level leads to travel starting again

Tiers/levels/rates rising are a clear red flag

- As areas and rates rise there is an imperative for those who can to reduce/cease their bus usage. Even users will cease in the toughest conditions

Tiers/levels/rates falling do not have the same effect in the opposite direction

- Falling rates/levels/tiers are the signal for some users to start using the bus again
- However, most claim they would still take a view on what the actual rates/levels were regardless of fact they're falling before using the bus to 'normal' patterns again

Removal of the threat is the only 'silver bullet'

- The only element which united both users and lapsed in thinking they would feel happy to return to their previous usage patterns was Covid generally no longer being a significant risk

At the moment the rate of infection is so high my parents don't want me travelling on the bus and if rates were rising they wouldn't let me use the bus. If the restrictions are high you are advised not to use public transport anyway and to stay at home for your own safety and the safety of others so I would do that

[Trio Lapsed Males, 17-19, D, London]

Elements around area changes (tier/level and rate) are in general likely to be more powerful negatives than positives.

Vaccination is reassuring, but is seen as only part of the solution

A positive step forward but a range of unknowns dilute perceptions of gain

Broadly positive response to emergence of the vaccine

- Most are keen to have it, and see it as a key part of the return to normality

Knowing many people have been vaccinated is not as powerful as having been vaccinated themselves

- While it is unknown if the vaccine can prevent transmission, a high vaccination rate does not in itself reassure about the safety of bus travel – there's no way of knowing if fellow passengers have been vaccinated or not

If the cases were getting lower, more people had been vaccinated and the buses were still running I'd think well public transport is still a thing so it must be safe, but I still probably wouldn't use them as much [as before], just a bit more [

[Female Pair, Lapsed, 14-16, C1C2, Glasgow]

Vaccination is positive, but will only be fully reassuring when most people have been vaccinated, the rates of infection have been observed to fall and there is information that suggests risk of infection in public places has lowered

Communicating what is being done has a powerful impact

The Oxford Buses film has strengths, but lapsed users unclear where they would see it



- ✓ Does speak to a sense that the buses must be being cleaned more than they were in the past – for both users and lapsed users
- ✓ Shows a compelling thoroughness, which works to encourage some lapsed users to think again about if it safe to use the bus
- ✓ Particular interest in the depth of cleaning shown, and the steps taken to ensure that all surfaces are clean when the bus leaves the depot in the morning
- ? Question the extent to which this can be refreshed over the course of the day – are buses safest first thing in the morning?
- ? Unlikely to visit YouTube to see it – would prefer to see snippets on social media, or as posters at bus stops
- ✗ Overly long, and too slow paced – detracts from what is being shown
- ✗ Some (user and lapsed) question whether the thoroughness is kept up everyday, or when the cameras aren't there

The Oxford film is doing some work to show how things are being made safe for the customer, and taken individually the elements do have the power to reassure. When put together into one film it raises questions about how credible it is for such levels of cleanliness to be maintained day in day out

Future bus services post pandemic

Some potential measures likely to encourage bus use

Likely to make a significant positive difference	Little effect on most
Services were more frequent	You were reminded of the general health benefits of using the bus – seen as an advantage by some, but not a key driver
Bus travel was cheaper	You were reminded of the environmental benefits of using the bus/zero emissions buses – will have some effect, but not a key driver
Different types of ticket were available	If more people using the bus was essential for services to remain in your area – would encourage some, but others either would remain happy with their alternative choices or respond negatively to a suggestion of ‘use it or lose it’
New rules about how many people can be on board and where they can sit – positive, but significant resistance to having to sit next to unknown people in the future; preference for more single seats	New buses with better features – charging points and Wi-Fi desired, but beyond that most struggled to articulate what other new features they would want to see that could make a difference to them
Enforcement activity for those who don’t follow safety guidelines – attractive for both users and lapsed, but thought to be difficult in reality	
Proof of deep cleaning of the buses/new hygiene measures – significant effect on lapsed users if it can be evidenced credibly	

Improvements for future bus services are rooted in both physical changes to the buses themselves, and an expected continued insistence on hygiene and distancing into the future. There is a sense that time and affordability are still really important to respondents, but at the moment the safety concerns are key

Future bus services post pandemic

Likely to make a significant positive difference

What if ...

Services were more frequent

- Especially in suburban and more rural areas – increasing ability to be flexible when out and about
- Most would rather have reliable services at the times they are already supposed to have buses however
- More services desired between spokes, rather than hub and spoke routes

Bus travel was cheaper

- Would have an impact on many (although already seen as competitive vs other forms of transport)
- Those with concession passes would like to see additional money off peak time travel where their cards currently only let them travel off peak

Different types of ticket were available

- Particular interest in flexible use – e.g. no expiry date
- Belief from some that they are unlikely to go back to daily use (because their travel patterns have permanently changed) so traditional any time season tickets might now be less compelling

It's always a gamble if the bus will turn up, because they are hourly. If they don't then it messes up your whole plan, because they're not frequent enough to rely on

[Female Pair, Lapsed, 14-16, C1, Gloucestershire]

I look at it like this, I'm not going to be on a bus 5 days a week anymore so if there's a way of bringing the cost down that isn't a season ticket then that's going to work for me

[Male Trio, Lapsed, 46-69, BC2, Swansea]

Timing and ticketing have the most potential to encourage people to use buses more post the pandemic

Future bus services post pandemic

Hygiene is going to remain a significant factor

What if ...

New rules about how many people can be on board and where they can sit

- Even post the pandemic, people have become conditioned to not be comfortable sitting next to strangers, and expect this feeling to continue
- Knowing that they won't be travelling on a full bus is attractive

I'd feel safer if the bus drivers had more authority to make sure people put a mask on. They can do it in shops – it should be the same for public transport

[Female Pair, Lapsed, 14-16, C1, Gloucestershire]

Enforcement activity for those who do not follow safety guidelines

- Enforcement activity is thought to be difficult to envisage, but at the same time even post the pandemic there is likely to be continued wariness about the behaviour of others
- Knowing that there is a zero tolerance approach to not following the rules would be reassuring

I think for future it'd still be handy for them to keep the hand sanitizer there...it's never really going to be properly over, it's just going to be part of life. Like when winter comes, you could get flu or you could get Covid

[Female Depth, Current, 5 1-69, C2, Leicester]

Proof of deep cleaning of the buses / new hygiene measures

- Worries about the pandemic are not going to cease with Covid – expectation that vigilance will be needed to ensure there are no further outbreaks
- Also, some mention benefits of face covering wearing to reducing cold and flu transmission so expect this to be continued post pandemic

Covid has heightened awareness of the importance of hygiene (especially as a proxy for wider safety) and both current and lapsed passengers think that this change will continue even as the pandemic recedes into the past

Future bus services post pandemic

Less impact on bus usage

What if ...

You were reminded of the health benefits of using a bus

- Some appeal to those who are concerned about their health
- Currently difficult to square with worries about Covid health risk
- Unlikely to have as much impact on most as price and convenience advantages

You were reminded of the environmental benefits of using a bus / zero emissions buses

- Important to some younger users, and most think this is something that is going to be more important in the future
- However, doesn't impact as a driver for most, and not for males in particular

If more people using the bus was essential for services to remain in your area

- Some inclined to dismiss this possibility because they expect to get back to normal post the pandemic
- Older users (with no other transport choice) likely to want to save their services but most don't see the threat as credible because 'things will go back to normal'

New buses with better features

- None thought it was credible that the bus fleet would be renewed immediately post Covid
- Longer term aspirations for Wi-Fi and charging points, better seats, etc. but not likely to have a short term impact
- **Some demand from mobility users for reduction in raised back seats so they can use more of the seats themselves and more wheelchair accessibility and spaces**

I would think people would ignore all of this completely, it's easy and cheap, that's what matters to people

[Male Pair, Lapsed, 70+, B, London]

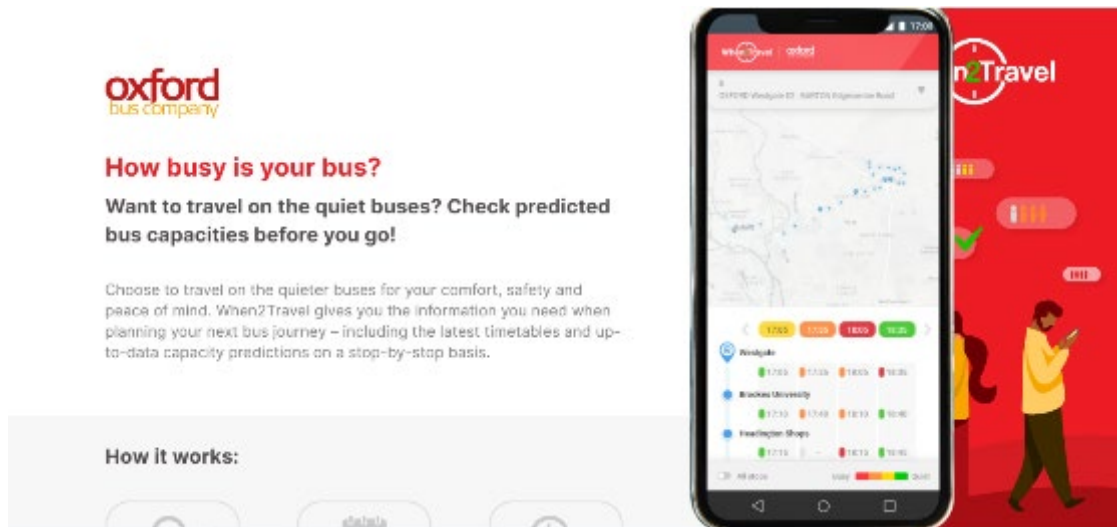
Environmental issues I consider massively in my choices

[Male Pair, Lapsed, 14-16, C1, Gloucestershire]

The focus is on frequency regularity and hygiene of services as priorities, with more 'peripheral' concerns less important in enticing back the majority

Showing when it's safe to travel

There is interest in the 'when 2 travel' tool



- ✓ Shows clearly when the busiest periods are and addresses the key concern about whether there is likely to be available capacity to board the bus
- ✓ Could be integrated further into a real-time planning app
- ✓ None had seen a tool like this before (including in Oxford) and would want to see something similar in their area
- ✗ However, of less use to those who have to travel at a certain time except in potentially helping them to *rule out* bus use as an option

Predictive capability is useful (in terms of using past data to estimate demand/capacity for a future date) - could be enhanced by integration with real-time data in the future to make for a more compelling tool.

Different pricing strategies

The Reading Buses examples provoked debate



- ✓ Clear interest in getting money off when buying multiple tickets
- ✓ No option was more compelling than the others, however the key element is the fact that there is no expiry date
- ✓ Fits with expectation that bus use might be more flexible in the future (e.g. because WFH more) so the open ended weekly or monthly pass might not be such a good deal for some
- ? Unlikely to appeal to those with concessionary passes, although if they could purchase discounted tickets at the busiest times then it would have cut through
- ? Little view on what an acceptable level of saving is, though the 20% mentioned in these examples felt ok

While some expect to continue to be daily bus users in the future (or to resume that pattern when it's safe) there is a belief from many that more flexible ticketing solutions might be attractive in the future as usage patterns change.

Conclusions

Usage has changed, but most in this sample claim this is not permanent

Current and lapsed users see the advantages of bus travel and are largely keen to return to normal

The experience of bus passengers during the pandemic has been varied

- Some advantages – being able to get a seat, buses being less crowded
- But also new worries – social distancing, compliance with rules, being able to get on the desired bus at the desired time (capacity)
- Overall driving a desire from current users for more buses and more enforcement of the rules

Passengers have lapsed for two key reasons

- Concern about risk from Covid – not wanting to be infected themselves or to infect others
- The journey itself no longer exists, so they have no need to travel as they did before the pandemic

There is a desire to return

- Most current and lapsed users want to return to their old patterns of bus usage as soon as they are able:
- When the virus has been brought under control
- (for lapsed) when they are sure that the buses themselves are safe
- When the reasons for making journeys come back (e.g. pubs and non essential destinations reopening)

Only a minority of this sample believed that they have permanently stopped using buses – because they don't believe the virus will ever make it safe enough or they have permanently changed their travel habits. Most expect to return, when their need to make journeys return.

Some lapsed users will be quicker to return than others

A contingent of lapsed users need to be reassured on current safety measures, and could return soon

Knowledge of safety precautions on buses is poor, or they have had a bad experience

- The Oxford film was working well to reassure lapsed users, but it needs to be punchier and shorter so it can be shared widely on social media
- A message from their local bus company, saying e.g. 'we take your safety seriously and this is what we're doing about it' may cut through for the more reachable

This message needs to be multichannel and reinforced by actions

- Alongside social media, eye catching posters at bus stops and on the side of the buses themselves will help to spread the message wider while people are out of home
- Visible proof of cleaning – including signature sheets, smell of disinfectant on buses, and cleaning parties at major bus stops

But some will continue to disbelieve the bus really is safe

- Some lapsed passengers are harder to reach – not leaving their homes and unlikely to trust that buses are being made safe at all times
- Will return as their perceptions of the wider risks of Covid improve, and unlikely to be reached by current actions of the operators (although seeing the steps above would be a positive step for them)

To reach the more persuadable lapsed passengers and encourage them to return there is a need for clear messaging around safety and the steps that operators are taking to ensure this. Those who have simply lapsed because their journey no longer exists expect to return as soon as possible.

Appendix

Perceptions of bus usage prior to the pandemic were largely consistent across the sample

Consistent set of positives and negatives across audiences

POSITIVES

Cheap / affordable

Convenient

Frequent (in urban areas)

Social (more rural)

Don't have to concentrate on driving

Can read / listen to something / think

Don't have to worry about parking

Get you closer to your destination than private vehicles are allowed

More environmentally friendly

NEGATIVES

Can be crowded at the busiest times

Can't always get a seat

Routes are not as direct as they could be

Poor time keeping

Dirty

Can be poorly ventilated in the winter ('muggy/damp')

Rural services infrequent and finish early in the day

The primary benefits are around convenience and removing the need for own transport. The negatives are more about the experience of being on the bus itself, which can be crowded, dirty and uncomfortable.

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