

# The route ahead: getting passengers back on buses

Qualitative research findings

April 2021



# Summary

**Transport Focus carried out in-depth research in December 2020 and January 2021 into current and lapsed bus passenger experiences. This looked at perceptions and expectations of travelling during and after the Covid-19 pandemic.**

We found that the public is following guidance to travel less but, beyond this, people have real concern that buses present a risk of infection for themselves or others.

Although only a minority of passengers are not following protection measures such as wearing face coverings and social distancing, there is a belief that non-compliance is a serious issue, particularly at times when buses are busiest.

Current users are aware of measures that operators have taken to ensure their safety. However, lapsed users are much less aware of these measures and are influenced predominantly by negative content through word of mouth or the media which directly feeds concerns around non-compliance.

There is a key need for reassurance around safety on buses. This should be communicated on the bus and in advance, with both Government and operators using media to convey clear messages, along with other trusted voices such as the NHS.



## **Learning points and recommendations**

Many passengers will be returning to the bus on 12 April after months of lockdown in which they have not travelled by bus. We believe our findings, learning points and recommendations, which build on what most operators are already doing, provide a solid basis on which the bus industry can restore passenger confidence.

## **Priorities for improvement**

Passengers' priorities prior to the emergence of the Covid-19 pandemic have not gone away. The bus industry still needs to focus on getting the basics right: frequent, punctual services and value for money fares.

## **Flexible fares**

Operators should introduce, and promote the availability of, more flexible tickets which reflect new patterns of demand. These should provide

attractive deals for those who are travelling two or three times a week and those wishing to make multiple trips over an extended period. Operators should also consider increasing their promotions, such as reduced/discounted fares for a fixed period or deals for travelling to visitor attractions.

### **Longer term**

In the long-term, operators should consider incorporating a second set of doors into the design of new low-emission buses to enhance passenger safety and punctuality. Local authorities and bus operators should commit to the introduction of new facilities and measures to improve the punctuality of services and speed up bus journeys. Performance should also be reported by operators in their Bus Service Improvement Plans.

### **Promoting safety**

More immediately, operators should ensure that in addition to expecting all passengers to wear a face covering (unless exempt), they protect passengers by:

- promoting social distancing by running a sufficiently frequent service, using floor

markings and making it clear if any seats are not to be used

- reducing the risk of airborne infection by using disinfectant sprays, good ventilation and temperature control and/or advanced air-conditioning systems which remove stale air
- reducing the risk of infected surfaces through cleaning regimes and by providing hand sanitiser
- providing contactless facilities for those wishing to pay by this method (although a cash option should be retained)
- drivers opening all windows before the start of each journey.

### **Communicating safety**

Operators should identify key safety messages for current and lapsed users around:

- the action taken to maintain social distancing
- the action taken to reduce airborne infection
- cleaning regimes
- the provision of facilities for contactless payments.

They should provide clear messaging around

how passengers can minimise the spread of infection while on the bus, including when getting on and off. Requirements for wearing face coverings should be clearly stated.

They should use trusted and effective channels to communicate these key messages on and off the bus to existing and potential users. This includes bus shelters, the sides of buses and onboard audio-visual announcements.

Operators are encouraged to promote 'when to travel' or crowding tools, to display signature sheets documenting when the bus was last cleaned, and to ask cleaning teams to board buses at major stops to demonstrate that cleaning continues throughout the day.

Government should publish prominently, as soon as possible, advice on the safety of non-essential travel on buses and other forms of public transport.

Operators should help to develop a culture where all disembarking passengers are given time to leave the bus before new passengers are invited to board.



# Introduction



**Transport Focus has been investigating public attitudes towards the impact of Covid-19 on bus services since the pandemic began. We have captured the views of both passengers and non-bus users. Alongside this, we have been continually talking to the bus industry about passengers' experiences and needs.**



We want to help the bus industry gear up for the relaxation of restrictions by understanding the anxieties of those who may be returning to the bus after a lengthy absence

This latest piece of research, carried out during December 2020 and January 2021, is our most in-depth investigation of the subject yet.

We are following it up with a major survey of people who have carried on using buses during the pandemic, those who have stopped doing so and those who rarely use buses. This will put numbers against our initial findings. We will be publishing the results of this follow-up research soon.

However, given the fast-moving nature of the pandemic and our developing response to it, we feel it is important to publish our initial findings at the earliest opportunity. As set out in the Government's roadmap for England a significant relaxation of the national lockdown rules will take place on 12 April, with the opening up of non-essential shops, gyms and hairdressers, and the outdoor areas of pubs, cafes and restaurants. We want to help the bus industry gear up for this development by understanding the anxieties of those who may be returning to the bus after a lengthy absence, putting in place the measures would-be passengers expect and communicating effectively what the industry has done to make people feel safe.

While the vaccination roll-out in England has been going well up to now, and there is hope of a further loosening of restrictions through the spring and summer, there is no guarantee that the pandemic will be quickly and decisively defeated. Measures that keep passengers safe and maintain their confidence in the service are likely to be needed for some time to come.

Running a successful bus operation has always been first and foremost about getting the basics right – value for money, frequency and punctuality – and this continues to be the case. However, passenger confidence in safety on board the bus has never been more important, and we want to help the bus industry restore that confidence.



# Methodology



The research was carried out for Transport Focus by market research agency Define. It consisted of lengthy one-to-one interviews and discussions with groups of two or three people conducted on Zoom. A minority were conducted by telephone to accommodate access issues.



In total 230 people participated in this research, including 32 from London, 130 from the rest of England, 34 from Scotland and 34 from Wales

All respondents were asked to do a pre-task and post-task exercise, detailing their journey habits and changes. Most uploaded content to the platform used by our research agency (questionnaire, images, vox pops). Some used alternative methods, again to accommodate access issues.

Participants were also shown a three-minute video on safety measures introduced by Oxford Bus which the company kindly supplied to us for use in the research.

Fieldwork was carried out between 14 and 18 December 2020 and then 11 January to 2 February 2021.

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 after wave one fieldwork). Glasgow was at level 3 and Bridgend at alert level 3.


Post-Christmas fieldwork was carried out within national lockdown conditions in England and the highest level alerts in Scotland and Wales. It was also before the vaccine roll-out had reached many

respondents (though most were enthusiastic about its imminent availability).

In total 230 people participated in this research, including 32 from London, 130 from the rest of England, 34 from Scotland and 34 from Wales, making it a large-scale qualitative survey. Participants were drawn from a spread of ages (from age 14 upwards), genders and socio-economic backgrounds, and included those with a variety of disabilities.



# Safety measures

A man wearing a blue long-sleeved shirt, a high-visibility yellow safety vest, and clear safety glasses is cleaning the interior of a bus. He is holding a blue cloth and wiping a vertical metal pole. The bus interior features orange seats, a red and purple overhead banner with text like "10 min", and a security camera mounted on the ceiling. A sign on the window reads "airline" and "NELSON".

**The introduction of appropriate safety measures is the starting point for getting people back on buses. These measures should help passengers keep a safe distance and offset airborne and tactile infection.**





## Findings

- Worries about the pandemic are not going to end with the decline of Covid-19 – there is an expectation that vigilance will be needed to ensure there are no further outbreaks. Some respondents also mention the benefits of wearing face coverings to reduce cold and flu transmission and therefore expect this to be continued post-pandemic.
- Participants' suggestions included:
  - all openable windows to be open/better ventilation
  - heating to allow windows to be open through the winter
  - stop buttons that can be activated without being physically touched
  - hand sanitisers and wipe dispensers to be available on all buses and regularly checked/refilled.
- Proof of deep cleaning of the buses/new hygiene measures would have a significant effect on lapsed users if it can be evidenced credibly.
- People want more opportunity to use contactless payment, passes and advance purchase, although this tends to be more about speed of boarding/time at stops rather than being driven solely by hygiene/cash handling concerns.



## Learning points

- Operators should ensure that, in addition to expecting that all passengers wear a face covering (unless exempt), they protect passengers by:
- promoting social distancing by running a sufficiently frequent service, using floor markings and making it clear if any seats are not to be used
  - reducing the risk of airborne infection by using disinfectant sprays, good ventilation and temperature control and/or advanced air-conditioning systems which remove stale air
  - reducing the risk of infected surfaces through cleaning regimes and by providing hand sanitiser
  - providing contactless facilities for those wishing to pay by this method (cash option should be retained)
  - drivers opening all windows before the start of each journey.



## Transport Focus comment

- We recognise that many operators have already implemented many of these measures and that the principle of enhanced cleaning regimes is widely accepted.
- Some people find it strange that hand sanitiser is available at the entrance to many shops but not routinely on buses. Providing hand sanitiser on board buses is likely to reduce the frequency with which surfaces become infected and then need disinfecting.
- Some passengers are suspicious of air-conditioning systems, fearing that they may simply re-circulate stale air, so effective communication is essential.

# Communicating about safety

Take a seat



It is important that bus operators ensure passengers and potential passengers are aware of measures taken to keep them safe and that they understand what is expected of them when travelling by bus.





## Findings

- Participants said that knowing they won't be travelling on a full bus is attractive. Participants shown the crowding app felt that it clearly displays when the busiest periods are and addresses the key concern about whether there is likely to be available capacity to board the bus. They said they would want to see something similar in their area and that it could be integrated further into real-time planning tools. The app was considered to be most useful for those who are more flexible about when they can travel.
- Current users are aware of measures that have been taken by operators to ensure their safety. They want to see general rules on behaviour – though these are frequently not read because passengers are 'keeping their heads down'. There were comments that notices are typically displayed near the driver or that users noticed nothing else other than tape that cordoned off individual seats.
- Lapsed users are much less aware of safety measures (a finding which reinforces findings from our Travel during Covid-19 omnibus research) and are influenced by predominantly

negative content by word of mouth or from the media that heightens concern around non-compliance. There is a key need for reassurance around safety on buses to be communicated during the journey. It should also be communicated beforehand through clear messaging from both Government and operators as well as other trusted voices such as the NHS.

- Some claim to have seen materials from their local operator and councils. 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. A few claimed to have seen social media posts from operators about the safety measures being adopted in the last year.
- There is a sense that there has been less communication since summer 2020 and some desire to see what the situation is now. Passengers are not going directly to bus operator websites or social media pages in the normal course of their day, so even though they are interested they need messages to be 'pushed' to them. 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. A lot of information is being circulated on community websites and by face-to-face conversations. This includes much hearsay, particularly around poor behaviour on the buses from passengers and about overloading. This is believed because lapsed passengers have no benchmark to measure it against.

- Participants' suggestions included:
  - signs giving permission to open windows
  - clear communication of rules and expectations around behaviour
  - more obvious cleaning of the bus at major stops throughout the day
  - buses smelling of disinfectant to promote that cleaning is happening regularly
  - information about the rules and safety practices that have been adopted by operators to be displayed on the side of the buses to catch the eye of lapsed passers-by.
- As the gateway to usage, bus stops play an important role in setting expectations about the service. Display of Covid-19 rules for bus use is useful and most think this should be standard at bus stops for clarity and reassurance.



### Learning points

- This message needs to be multi-channel 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 their homes. There also needs to be visible proof of cleaning – including signature sheets, the smell of disinfectant on buses, and cleaning parties at major bus stops.
  - Participants viewing the Oxford Bus video on what is being done to keep passengers safe said they would be unlikely to visit YouTube to see it and would prefer to see snippets on social media, or as posters at bus stops. They felt it needs to be punchier and shorter so it can be shared widely on social media. A message from their local bus company saying, for example, ‘we take your safety seriously and this is what we’re doing about it’ may be more effective.
  - Because the Government itself 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. Working together on messaging could help to boost trust.
- Operators should identify key safety messages for current and lapsed users around:
    - the action taken to maintain social distancing
    - the action taken to reduce airborne infection
    - cleaning regimes
    - the provision of facilities for contactless payments.
  - Operators should provide clear messaging around how passengers can minimise the spread of infection while on the bus, including when getting on and off. Requirements for wearing face coverings should be clearly stated.
  - Operators should use trusted and effective channels to communicate these key messages on and off the bus to existing and potential users. This includes bus shelters, the sides of buses and onboard audio-visual announcements.
  - Operators are encouraged to promote tools for showing how busy their services are, to display signature sheets documenting when the bus was last cleaned and to ask cleaning teams to board buses at major stops to demonstrate that cleaning continues throughout the day.

- Government should publish prominently, as soon as possible, advice on the safety of non-essential travel on buses and other forms of public transport.



### Transport Focus comment

- We accept that operators are doing their best to get their safety messages across. Our research suggests that ‘seeing is believing’ and that physically demonstrating that action has been taken can be a more powerful communication tool than words.
- Persuading lapsed users to give the bus another try requires short, punchy reassurance displayed on the sides of buses, on social media and at bus stops.



# Enforcement of rules



**Enforcing the rules on passengers maintaining social distancing and wearing face coverings (unless exempt) reduces the risk of airborne infection and increases passenger confidence.**



## Findings

- It is a frequent complaint from both users and lapsed users across all locations that passengers board the bus wearing their face coverings and then pull them down once they have sat down – contributing to a sense that safety is being compromised. While there is a feeling that only a minority do this, it is clear some users feel this non-compliance makes a big impact. 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. This comes from a perceived lack of respect for bus drivers from rule-breakers and the sense that they would be in a difficult position.
- It is generally clear which seats may/may not be sat on. However urban users are more likely to suggest that this is not always enforced which is another source of concern.
- Participants' suggestions included conductors/ second staff to enforce compliance among passengers.
- Even after the pandemic there is likely to be continued wariness about the behaviour of others so knowing there is a zero-tolerance approach to not following the rules would be reassuring.



## Learning points

- Operators should help to develop a culture where all disembarking passengers are given time to leave the bus before new passengers are invited to board.



## Transport Focus comment

- Passengers are realistic about the challenges around enforcement.
- Drivers may be reluctant to ask passengers to wear a face covering (unless they are covered by one of the exempt categories) and to wear it correctly over their nose and mouth for the entire journey for fear of confrontation and delay.
- While not strictly necessary to prevent infection, drivers opting to wear face coverings may encourage compliance among some passengers. But even so, some drivers may choose not to wear one, so explanations of why drivers do not need to wear face coverings may be helpful to some passengers.
- Our recommendation here is linked to our longer term recommendation about considering the addition of a second set of doors on new buses to enhance the safety and reliability of buses.



# Ticketing



**Flexible tickets and introductory ticketing offers may encourage more people to travel by bus, particularly commuters working more from home than previously and lapsed users.**



## Findings

- Cheaper bus travel and the availability of different types of tickets would be likely to encourage bus use – there is particular interest in flexible bus use.
- Among things within the bus industry's control, ticketing has the most potential to encourage people to use buses more after the pandemic, along with frequency and reliability.
- Participants demonstrated a clear interest in getting money off when buying multiple tickets. However the key element is the fact that there is no expiry date. This fits with the expectation that bus use might be more flexible in the future (because they may be working from home more) so the open ended weekly or monthly pass might not be such a good deal for some. Multiple ticket discounts would be unlikely to appeal to those with concessionary passes, although if they could purchase discounted tickets at the busiest times then it would be more attractive. There was little view on what an acceptable level of saving is, though the 20 per cent mentioned in the examples we provided felt right to many.



## Learning points

- Operators should introduce, and promote the availability of, more flexible tickets which reflect new patterns of demand by providing attractive deals for those who are travelling two or three times a week and those wishing to make multiple trips over an extended period.
- Operators should consider increasing promotions such as reduced/discounted fares for a fixed period or deals for travelling to visitor attractions.



## Transport Focus comment

- Some flexible tickets already exist – the problem may partly be low passenger awareness. Our research with young people indicates a generally low awareness of a complex range of fares/deals.
- Removing expiry dates from tickets may be impractical as it would effectively freeze ticket prices indefinitely for those benefiting from them, while others would be bound by fare increases. An extended, specified expiry date may be more realistic.
- Our work in Liverpool suggests discounted fares and unified branding on tickets can boost promotions.
- Our 'Give Bus A Go' campaign in the West Midlands immediately prior to the pandemic demonstrated the potential of getting non-users to try out buses.
- We appreciate that care needs to be taken when using deals that seek to increase patronage. If take-up were high it may cost operators too much and may make buses too busy. This could undermine efforts to demonstrate that passengers are safe on buses while social distancing rules persist.



# Longer term



**In addition to short-term measures, our research points to certain measures which have a longer lead time.**



# Redesigned vehicles

**Modifications to the design of vehicles may help passengers to keep a safe distance from each other when seated and while getting on and off. They may also contribute to reduced journey times and improved punctuality performance.**



## Findings

- Respondents from more urban areas (both current and lapsed users) report having travelled on buses that they felt were over capacity. This has been the trigger for some to stop using buses. They don't like having to pass closely by people while boarding and leaving.
- Most think it is difficult to see how getting on and off 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.



## Recommendation

- Operators should consider incorporating a second set of doors into the design of new low-emission buses to enhance passenger safety and punctuality.



## Transport Focus comment

- Our 2014 report *What's the Hold-Up?* indicated that adding a second set of doors would speed up boarding.
- Some operators outside of London, for example Brighton & Hove Buses, have introduced buses with two sets of doors on certain routes.
- We accept that there are trade-offs. For example, adding a second set of doors reduces capacity so it may only be suitable on certain routes.

# Improving punctuality

As the Government’s National Bus Strategy acknowledges, improved bus punctuality is a key passenger priority.



### Findings

- Key factors in less satisfactory journeys include the bus being late or not turning up at all.
- Along with ticketing, reliability has the most potential to encourage people to use buses more after the pandemic.
- *What’s the hold-up?* catalogued reasons for delays and was supported by focus group research reported in *Bus punctuality and timetables*.



### Recommendation

- Local authorities and bus operators should commit to the introduction of new facilities and measures to improve the punctuality of services and speed up bus journeys, and report on their performance in their Bus Service Improvement Plans.



### Transport Focus comment

- Traffic congestion is a massive subject and tackling it extends well beyond the scope of this research to the relative cost of different modes. This includes parking charges and enforcement and control of roadworks which are acknowledged in the National Bus Strategy.
- Levelling-out travel peaks across the day could help, but school opening hours and the scheduling of hospital appointments are unlikely to change significantly.
- Local authority investment in bus priority measures can help to give buses a competitive advantage in negotiating the congestion.
- Operators can play their part, for example through better scheduling of available drivers, building ‘recovery time’ into schedules and introducing measures to speed up boarding and alighting (this links with our double doors recommendation above, which may result in speedier as well as safer boarding).



# Conclusions

**Passengers' priorities prior to the emergence of the Covid-19 pandemic have not gone away. The bus industry still needs to focus on getting the basics right: frequent, punctual services and value for money fares.**

Many passengers will be returning to the bus after months of lockdown in which they have not travelled by bus. Operators may find it hard to imagine how little these passengers know about what to expect and how much information and reassurance they may need. Their expectations may be negative having been influenced by word of mouth and social media. Our omnibus research confirms this gap between perception and reality. Significant communications efforts are needed prior to key milestones in the Government's roadmap in order to rebuild passenger confidence.

Flexible tickets which reflect new patterns of working and travelling should be promoted. Traditional weekly, monthly and annual passes may no longer be attractive to passengers who are working more from home.

A clean bus was always a basic demand from passengers, but the pandemic has increased its importance. Some of the short-term

safety measures introduced to tackle the risk of infection should be retained after the immediate pandemic has passed. Clean buses are here to stay.

New buses are attractive to passengers. Where possible they should be designed to reflect the lessons learned during the pandemic, with passenger consultation built into the process.

Bus operators and local authorities must redouble their efforts to tackle traffic congestion and make bus services more reliable. They must also build on the commitments in the Government's new National Bus Strategy.

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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.**