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Background and objectives



Overall objectives

- As a result of the COVID-19 pandemic, almost no research was conducted in 2020 to understand passengers' views on travelling during and after the COVID-19 pandemic. This research is aimed to achieve that by providing some robust data following some qualitative work Transport Focus carried out early 2021.
- Specifically the research wanted to understand the experiences of bus passengers and their perceptions of the sector as a result of the pandemic and what the longer term impact may be with regard to bus usage.

Key objectives per user groups

Current users

- Understand the experience of bus usage during the COVID-19 pandemic
- Understand changes in attitudes to bus travel as a result of the COVID-19 pandemic
- Provide an indication of any anticipated changes to travel behaviour amongst current users in the short, medium and long term

Lapsed users

- Understand the reasons why those that used to use buses are not currently doing so
- Understand changes in attitudes to bus travel as a result of the COVID-19 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 lapsed users in the short, medium and long term

Non / future users

- Understand the barriers to using the bus
- Understand changes in attitudes to bus travel as a result of the COVID-19 pandemic
- Identify the key actions and messages that will be required to encourage non-users to consider using buses in future





Methodology



Methodology

- Online survey targeting a nationally representative panel (14+ years old) base and achieving 10,335 completes. Data was weighted on age, gender, region and user type to ensure it is nationally representative.
- Fieldwork ran from 22nd March to 12th April 2021.
- To qualify, respondents had to live in Great Britain (England, Scotland or Wales).
- Robust sample sizes were achieved for each subgroup:

Current users (n=5,547)

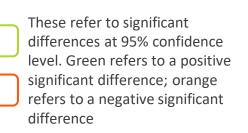
Any respondent who used the bus since the restrictions related to the COVID-19 pandemic started in March 2020 Fully lapsed users (n=2,792)

Any respondent who used the bus once every 3 months or more often before the pandemic, but not since, and is not a rejecter

Non users (n=1996)

Any respondent who used the bus less than once every 3 months or not at all before the pandemic, and not since, and is not a rejecter

- Specific sample sizes were achieved for each nation/region:
 - London: n=502
 - England (excluding London): n=7,663
 - Scotland: n=981
 - Wales: n=1,189







Key summary (1)

Bus usage incidence

Bus use in GB since the first restrictions in March 2020 varies between nations, with Wales recording the lowest levels of current users, while in Scotland and England (outside London) levels are similar. There are multiple factors that explain these differences; Wales for example, is the region with the highest number of respondents having access to a car, with 56% having access to a car all the time, while in Scotland the figure is 49% and in London it falls to 33%. As such Wales has a higher share of fully lapsed and non users compared to the other nations.

The split of the different travel segments in Wales is largely in line with the what is observed in Great Britain, but with a higher proportion of Cautious Car Choosers, consistent with the higher levels of access to a car. While current users are significantly less likely to be Cautious Car Choosers, this segment is more prevalent in the fully lapsed and non-user groups.

The experience

In Wales, the vast majority (84%) of current users felt safe taking the bus during the pandemic. There was a strong relationship between the sense of safety and how busy the bus was; overall, most current users experienced quiet buses on their journeys, but this was less likely to be the case in urban areas (where 60% said they were not able to catch the first bus all the time). This capacity factor in urban areas emerged across the rest of Britain with London recording the busiest buses.

At an overall GB level, satisfaction with taking the bus during the pandemic was high at 81%. Wales, despite the lowest bus use, recorded the highest satisfaction with 84% satisfied. Once again, London was the lowest performing region with 71% - because satisfaction is closely linked with how safe passengers felt, how quiet the buses were and how easy it was to catch the first bus, all of which scored lower in London.

Currently in Wales, passengers from rural areas would expect a bus service to be every 30 minutes on average and 15 minutes when they are from urban areas.

When users were worried or uncomfortable about other passengers' behaviour on the bus or at the bus stop, it was primarily because of their non-compliance with COVID rules and regulations. Enforcement of those rules and regulations is what current users most commonly want to see for improving their journey experience.

Other satisfaction metrics highlight that being able to social distance on buses is a key influencer on satisfaction – the highest satisfaction was recorded for the availability of seating (78%) and the lowest satisfaction for being able to find out how busy the bus is (44%).





Key summary (2)

Evolution of bus travel

In Wales, the number of bus users picked up in the summer of 2020 but never reached the levels of use from other regions in Britain.

Since the COVID-19 crisis started, bus use decreased (63% of current users have reduced usage). These are most likely to be the Anxious and Affected and leisure passengers.

The Anxious and Affected were the most frequent users pre pandemic and are those who have reduced their use the most (by almost 8 trips per month). The Rethinking Reducers followed closely behind with around 6 fewer trips a month.

The COVID restrictions in place regulating what people can and cannot do (from the roadmap), have an impact on bus use, so the lifting of those restrictions encourages passengers to use the bus more.

The Spring Back Socialisers are those most ready to increase their use of the bus as society reopens but they are less likely to travel more frequently than before March 2020.

The Cautious Car Choosers are the least impacted by those restrictions in terms of their bus use and only a few of them will increase their current bus usage.

By the end of the pandemic, bus use is predicted to pick up to almost its prepandemic levels (0.7 fewer trips per month on average) with nearly all fully lapsed users back on the bus.

The Anxious and Affected and the Rethinking Reducers are those that need targeting (e.g. reassurance or encouragement) as they record the largest deficit between pre and post frequency of bus use.





Key summary (3)

Opportunities

Despite the COVID pandemic, some users (14%) have increased their bus use. This was primarily for commuting reasons.

While the most frequent users pre pandemic are planning on decreasing their use post Covid, others are planning on slightly increasing their frequency. These accounted for 18% of users. Their reasons for planning more frequent trips is primarily for leisure purposes rather than commuting.

Threats

Similar to Great Britain, in Wales 39% of respondents went from using the bus regularly to not at all after the restrictions in March 2020 (fully lapsed users). This user group is over-represented by Spring-Back Socialisers but under-represented by the Carefree and Carrying on.

63% of current users have used the bus less often since the first lockdown in March 2020, driven by the Anxious and Affected, mainly from North and South East Wales and predominantly leisure travellers.

Also, just under 60% of users (current or lapsed) used another transport mode instead of the bus for some of their journeys. At a GB level, the use of alternative transport modes included cycling and walking for commuting and business journeys and using the car for longer leisure journeys.

The easing of social distancing measures on board buses will have a negative impact on passengers' comfort level and frequency of use.





Key summary (4)

Ways to increase usage

Understanding the experience of **those who have reduced their use during Covid** is crucial to finding solutions to mitigate the threats:

- Provision of information is one key element. The ability to find out how busy the bus is likely to be (or if it is full) is something that only 37% of those travelling less frequently were satisfied with.
- While the majority felt safe during their journeys (81%) those who hadn't reduced their bus travel are more likely to feel safer still. Those least likely to feel safe were from the more cautious segment (Anxious and Affected).
- Concerns about the behaviour of other passengers were also higher for those
 who have travelled less by bus, with 40% being worried at the bus stop and 69%
 on the bus (about other passengers). This was driven by COVID-related reasons,
 where keeping a safe distance, face coverings and not being considerate when
 getting on or off were the top reasons for feeling worried or uncomfortable.

For **fully lapsed users** concerns surrounding COVID-19 are a key reason for not travelling at the moment, but summer is expected to see a slight rise in the number who would feel more relaxed to travel. For **non users**, other modes of transport are more convenient, particularly in terms of journey length and service availability. That being said, non users are looking more likely to travel on a bus post-pandemic, while current users and fully lapsed will reduce their usage which provides a great opportunity.

For these two groups (**fully lapsed and non users**) it's important the provision of information covers ventilation, crowd control and sanitising. While enforcement of the rules is generally important, this is something these segments see a lot of information on and are aware of so communication of these is less pressing.

Rethinking ticket options and offering discounts will help increase bus use for about half of **current reducers** – especially in urban areas amongst younger passengers.

Users who have reduced their frequency of bus travel want to see clean and well-maintained buses, measures to help passengers keep a safe distance and enforcement of face coverings on board.

The availability of hand sanitizers, and improved punctuality and reliability to would also encourage them to use the bus more often.





Summary Findings – Carefree and Carrying on





Current users – 50%

Fully Lapsed users – 24%

Non-users – 26%

Currently travelling more often -6% About the same -16% Less often -29%

Focusing on Wales:

- 87% of all current users are satisfied with their bus journeys since March 2020 and 89% felt they were generally safe during their journeys.
- Despite this, they were slightly less satisfied with experiences on the bus compared to the other segments; as such 65% were satisfied with the enforcement of face coverings versus 73% seen at an overall Wales level.

For those who have reduced their use, are fully lapsed or non-users:

Top 3 COVID-19 reasons for reduced use of the bus:

- 1. Fewer leisure occasions 21%;
- 2. Following Government guidelines 19%;
- 3. Concerned about catching COVID-19 18%

Top 3 bus related reasons for reduced use of the bus:

- 1. Travelling by another mode is more convenient 28%
- 2. No bus related reasons (None of the above) 20%
- 3. Poor frequency of bus 16%

83% have a car or motorbike available to them and **51%** have made use of a different type of transport instead of bus since COVID-19 restrictions were first imposed.

MaxDiff Priorities to use the bus more often:

Punctuality and reliability - 138

Better value for money - 126

Buses running more often than they do now -126





Summary Findings – Cautious Car Choosers





Current users – 26%

Fully Lapsed users – 40%

Non-users – 34%

Currently travelling more often -7% About the same - 5% Less often - 15%

Focusing on Wales:

- 80% of all current users are satisfied with their bus journeys since March 2020 and 86% felt they were generally safe during their journeys.
- They were generally more satisfied with experiences on the bus compared to the other segments; as such 85% were satisfied with the enforcement of passengers to wear face coverings versus 73% for Wales overall.

For those who have reduced their use, are fully lapsed or non-users:

Top 3 COVID-19 reasons for reduced use of the bus:

- 1. Concerned about catching COVID-19 56%;
- 2. Concerned about other passengers not following COVID-19 measures 47% Both of which are significantly higher than the overall Wales figures
- 3. Following government guidelines 37%

Top 3 bus related reasons for reduced use of the bus:

- 1. Travelling by another mode of transport is more convenient 40%;
- 2. Poor frequency of bus 24%;
- 3. No bus related reasons (None of the above) 20%

90% have a car or motorbike available to them and **55%** have made use of a different type of transport instead of bus since COVID-19 restrictions were first imposed.

MaxDiff Priorities to use the bus more often:

Hand sanitiser is readily available on buses - 164

Measures in place on board buses to help passengers keep a safe distance – **161**

The inside of the bus is maintained and cleaned to a high standard - 158





Summary Findings – Anxious and Affected





Current users – 47%

Fully Lapsed users – 40%

Non-users – 13%

Currently travelling more often – 5% About the same – 7% Less often – 36%

Focusing on Wales:

- 75% of all current users are satisfied with their bus journeys since March 2020 and 68% felt they were generally safe during their journeys.
- They were significantly less satisfied with experiences on the bus compared to the other segments.
 The lowest satisfaction was for being able to find out how busy/full the bus is likely to be – 28%.

For those who have reduced their use, are fully lapsed or non-users:

Top 3 COVID-19 reasons for reduced use of the bus:

- 1. Concerned about catching COVID-19 54%;
- 2. Concerned about other passengers not following COVID-19 measures 43%;
- 3. Following government guidelines 41%

Top 3 bus related reasons for reduced use of the bus:

- 1. Poor frequency of bus 29%;
- 2. Travelling by another mode is more convenient 24%;
- 3. No bus related reasons (None of the above) 23%

72% have a car or motorbike available to them and **64%** have made use of a different type of transport instead of the bus since COVID-19 restrictions were first imposed.

MaxDiff Priorities to use the bus more often:

Measures in place on board buses to help passengers keep a safe distance – **185**

The inside of the bus is maintained and cleaned to a high standard – **170**

Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly -162





Summary Findings – Spring-Back Socialisers





Current users – 37%

Fully Lapsed users – 44%

Non-users – **19%**

Currently travelling more often – 3% About the same – 11% Less often – 24%

Focusing on Wales:

- 92% of all current users are satisfied with their bus journeys since March 2020 and 92% felt they were generally safe during their journeys.
- They were significantly more satisfied with experiences on the bus compared to the other segments for majority of the experiences. The highest satisfaction was for the helpfulness and attitude of the driver – 90%.

For those who have reduced their use, are fully lapsed or non-users:

Top 3 COVID-19 reasons for reduced use of the bus:

- 1. Concerned about catching COVID-19 43%;
- 2. Following government guidelines 41%;
- 3. Because there are fewer leisure occasions 34%

Top 3 bus related reasons for reduced use of the bus:

- 1. No bus related reasons (None of the above) 37%;
- 2. Travelling by another mode is more convenient 30%;
- 3. Poor frequency of bus 22%

87% have a car or motorbike available to them and **57%** have made use of a different type of transport instead of the bus since COVID-19 restrictions were first imposed.

MaxDiff Priorities to use the bus more often:

The inside of the bus is maintained and cleaned to a high standard -179

Measures in place on board buses to help passengers keep a safe distance — $\bf 158$

Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly - **153**





Summary Findings – Rethinking Reducers





Current users – 35%

Fully Lapsed users – 45%

Non-users – 20%

Currently travelling more often – 9% About the same – 6% Less often – 20%

Focusing on Wales:

- 79% of all current users are satisfied with their bus journeys since March 2020 and 79% felt they were generally safe during their journeys.
- They were generally satisfied with experiences on the bus, and were significantly more likely to be satisfied with being able to find out how busy or full the bus is likely to be relative to the other segments – 64%.

For those who have reduced their use, are fully lapsed or non-users:

Top 3 COVID-19 reasons for reduced use of the bus:

- 1. Concerned about catching COVID-19 57%;
- 2. Concerned about other passengers not following COVID-19 measures 39%;
- 3. Concerned about spreading COVID-19 32%

Top 3 bus related reasons for reduced use of the bus:

- 1. Travelling by another mode is more convenient 33%;
- 2. Poor frequency of bus 22%;
- 3. Too crowded/difficult to get a seat 21%

93% have a car or motorbike available to them and **72**% have made use of a different type of transport instead of the bus since COVID-19 restrictions were first imposed.

MaxDiff Priorities to use the bus more often:

The inside of the bus is maintained and cleaned to a high standard – **162**

Measures in place on board buses to help passengers keep a safe distance – **159**

Hand sanitiser is readily available on buses - 145

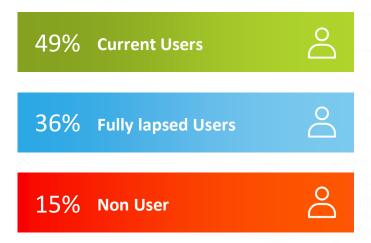






About half of all respondents to the survey used the bus during the first year of the COVID-19 pandemic. Bus use in London was the highest, and Wales was the nation with the lowest incidence rate



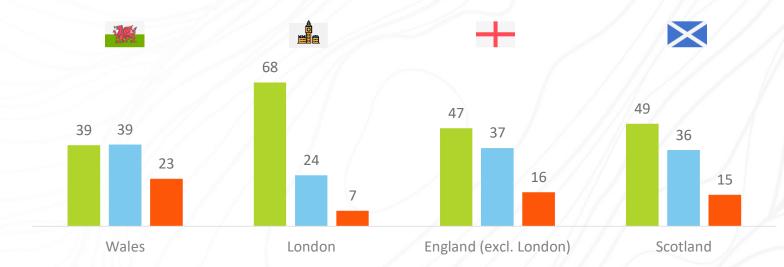


Any respondent who used the bus since the restrictions related to the COVID-19 pandemic started in March 2020

Any respondent who used the bus once every 3 months or more often before the pandemic, but not since, and is not a bus rejecter

Any respondent who used the bus less than once every 3 months or not at all before the pandemic, and not since, and is not a bus rejecter

In order to calculate the natural fall out of current users, fully lapsed and non-users we allowed all respondents to enter the survey but ensured the sample to be nationally representative based on ONS figures

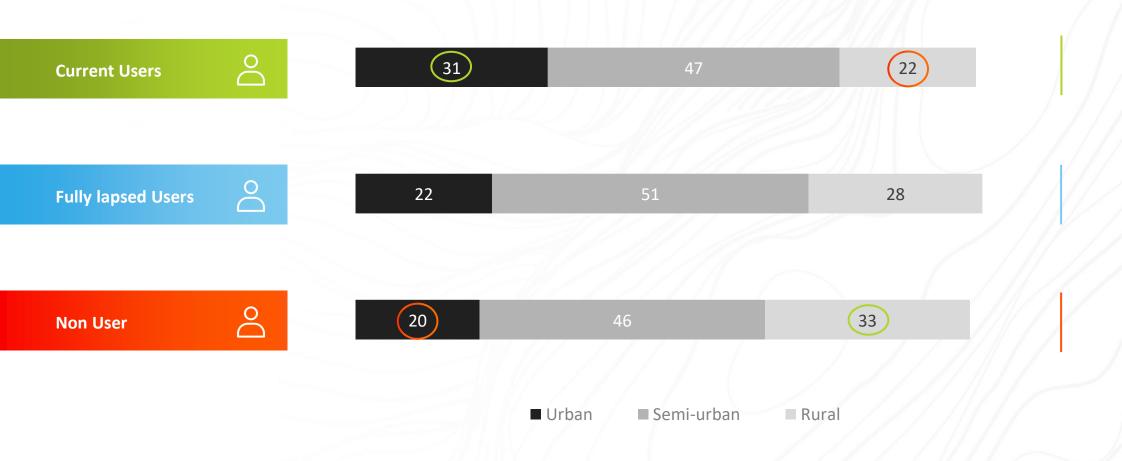






In Wales, current users are more likely to be from urban areas and non users from rural areas

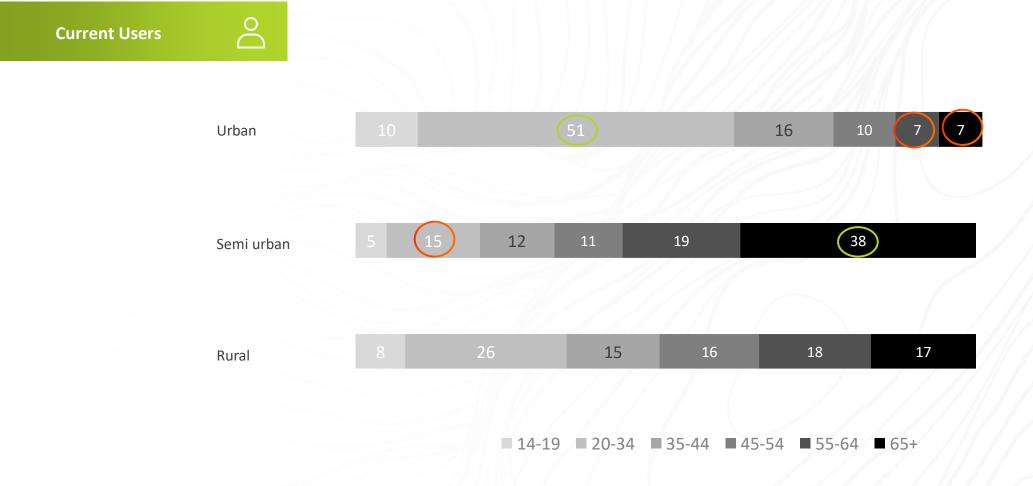






Current users in urban areas are considerably more likely to be younger while in semi urban areas almost 2 in 5 are 65 years or older







Meet the Transport Focus travel segments



		Transport Focus Omnibus April results*	Are more likely than others to have used public activities, which they are likely to do soon after
Carefree and Carrying on	20	21	They are the least anxious about using public transport.
			Are more likely to own a car and already used others to think that public transport is not for s
Cautious Car Choosers	19	27	They are anxious about using all modes of p transport in the future. They also say that the They are less likely than others to want to re- have reopened
	20		Are more likely to be reliant on public transpo to be using it as much in the future.
Anxious and Affected		16	Tend to feel more anxious than others about trensure safety on public transport.
Spring-Back Socialisers	29	27	Are more likely to be previous public transportations, which they are likely to do soon after
			They are less anxious than others about using safety on public transport.
Rethinking Reducers		9	Are more likely to have used public transport h
Hetmiking Reducers	11		Are more likely to have used public transport b They are more likely to say that they will nev more likely to be rethinking their future use of

Are more likely than others to have used public transport recently. They expect to use public transport again for their regular activities, which they are likely to do soon after places re-open.

They are the least anxious about using public transport and more likely to believe enough is done to ensure safety on public transport.

Are more likely to own a car and already used it rather than public transport before March 2020. They are more likely than others to think that public transport is not for someone like them.

They are anxious about using all modes of public transport. COVID-19 has made them rethink how they will use public transport in the future. They also say that they will never again feel completely comfortable travelling on public transport. They are less likely than others to want to return to places, such as non-essential shops, pubs and restaurants, once they have reopened

Are more likely to be reliant on public transport. They used public transport regularly before March 2020 but do not expect to be using it as much in the future.

Tend to feel more anxious than others about travelling on all modes of public transport and don't feel that enough is done to ensure safety on public transport.

Are more likely to be previous public transport users. Are more likely to use public transport to return to their regular activities, which they are likely to do soon after places re-open.

They are less anxious than others about using public transport and more likely to feel that enough is being done to ensure safety on public transport.

Are more likely to have used public transport before March 2020, but they don't expect to use it as much in the future.

They are more likely to say that they will never again feel completely comfortable travelling on public transport. They are more likely to be rethinking their future use of public transport.





Wales, which recorded the lowest share of current users of all nations, had a significantly higher proportion of Cautious Car Choosers. Because of its younger demographic, London recorded the highest proportion of Carefree and Carrying on.



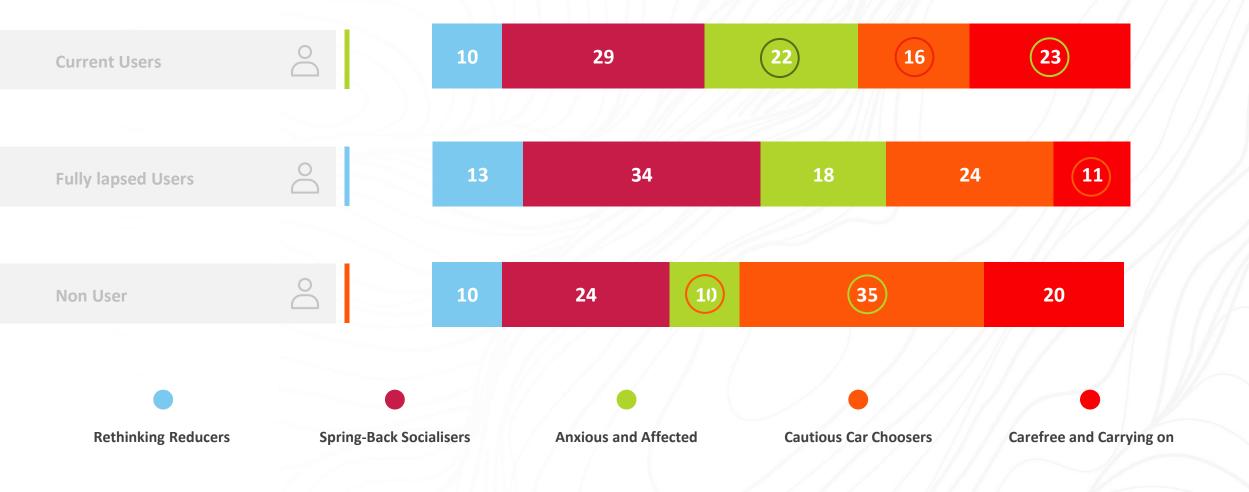






In Wales, 3 segments dominate current users, Spring Back Socialisers, the Anxious and Affected and the Carefree and Carrying on. Cautious Car Choosers are more likely to be non users

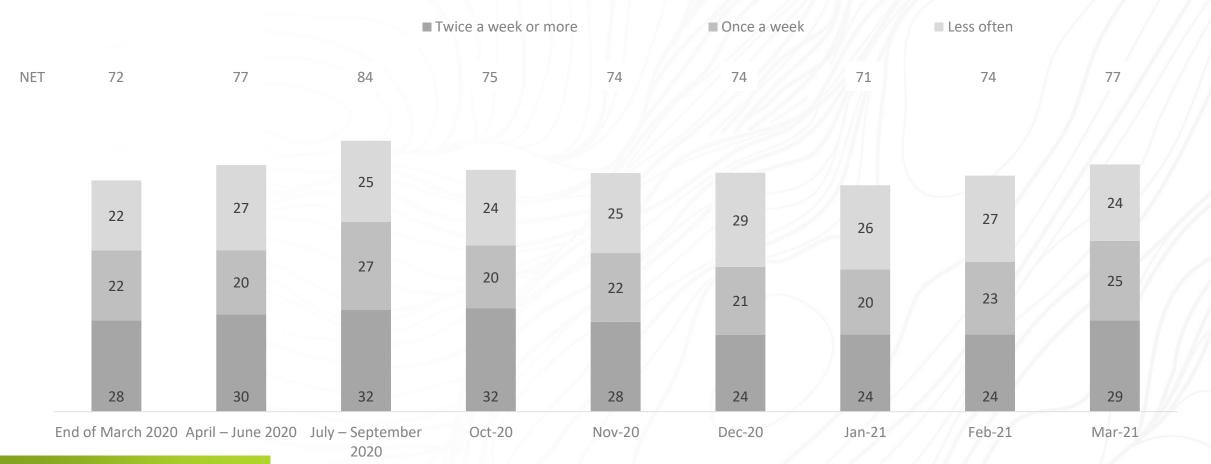






Bus use in Wales picked up during the summer of 2020 with 84% of those who have used buses in the past year travelling during July to September. This increase in the proportion of users travelling during the summer was driven by those using the bus once a week





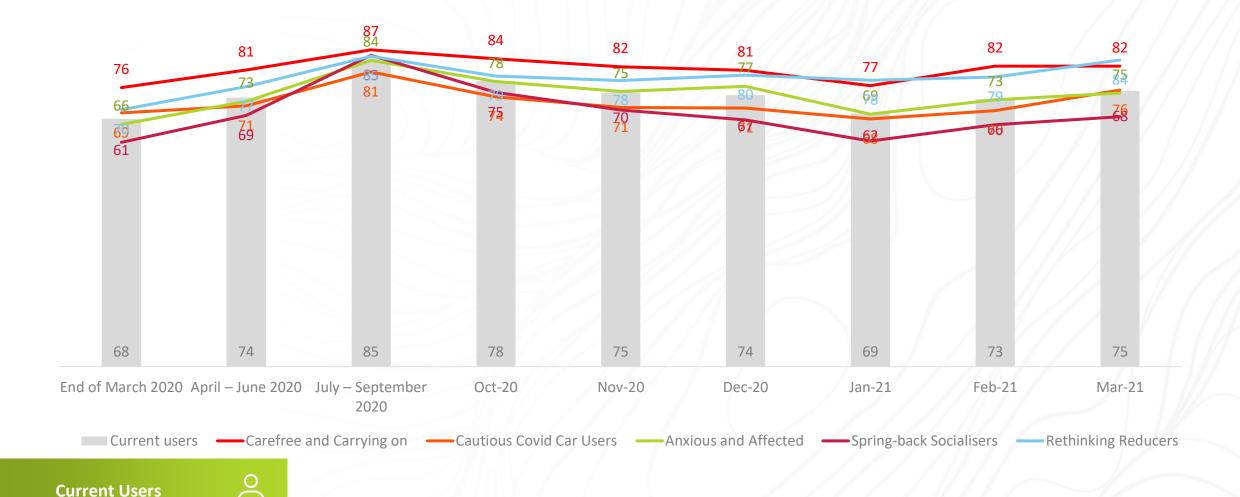
Current Users





A similar pattern can be seen across GB. Spring-Back Socialisers pushed the trend up more than others during those months when most restrictions were lifted, but their levels of use dropped back the most afterwards









Out of all current users, 3 in 5 have reduced their bus use frequency since the first lockdown in March 2020. These reducers are most likely to be from the Anxious and Affected segment and leisure passengers



Frequency of bus use change since the first lockdown in March 2020 (%)

24 63 More often ■ About the same Less often

Proportion of those who have used the bus less often (%)



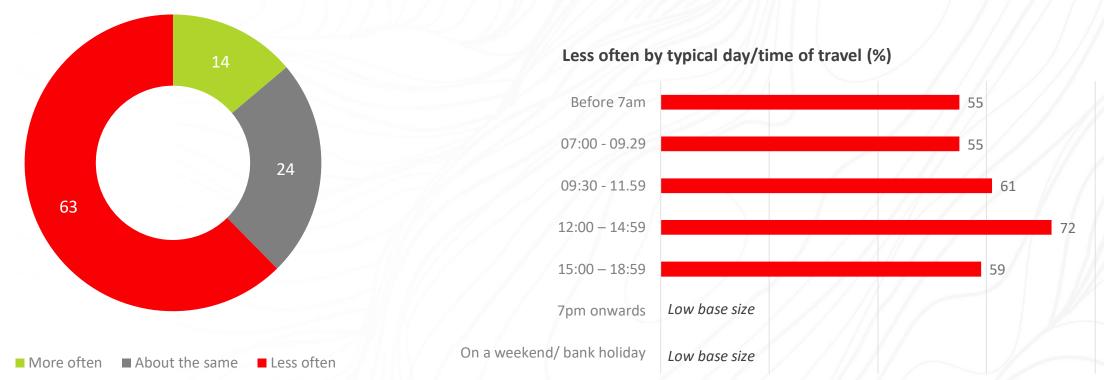




The highest proportion of reducers most typically travel between 12:00 and 14:59 hours



Frequency of bus use change since the first lockdown in March 2020 (%)



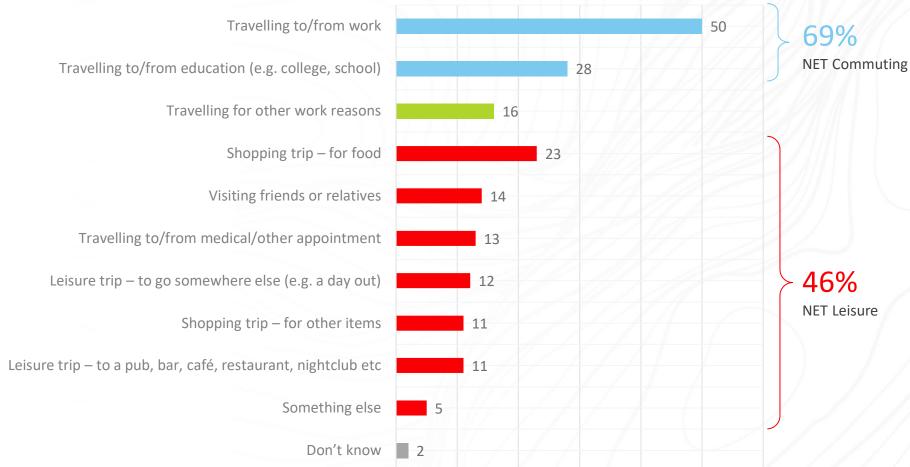




For the 14% who have increased their bus use the main reason is commuting



Types of journey amongst those that increased bus use (%)

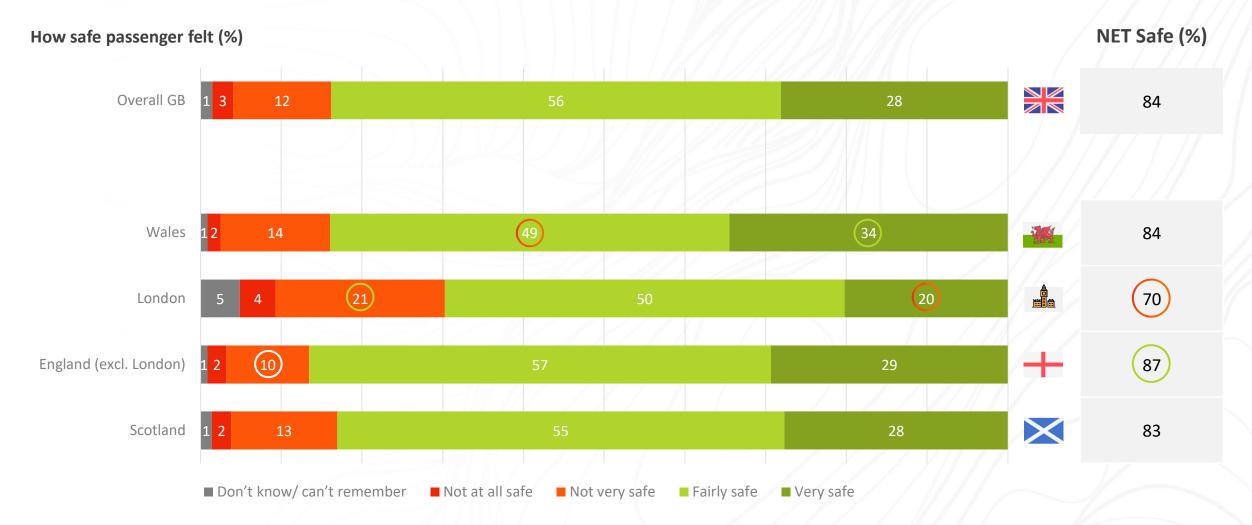






Most passengers who used the bus during the pandemic felt safe across the different nations. Wales record the highest share of passengers feeling very safe



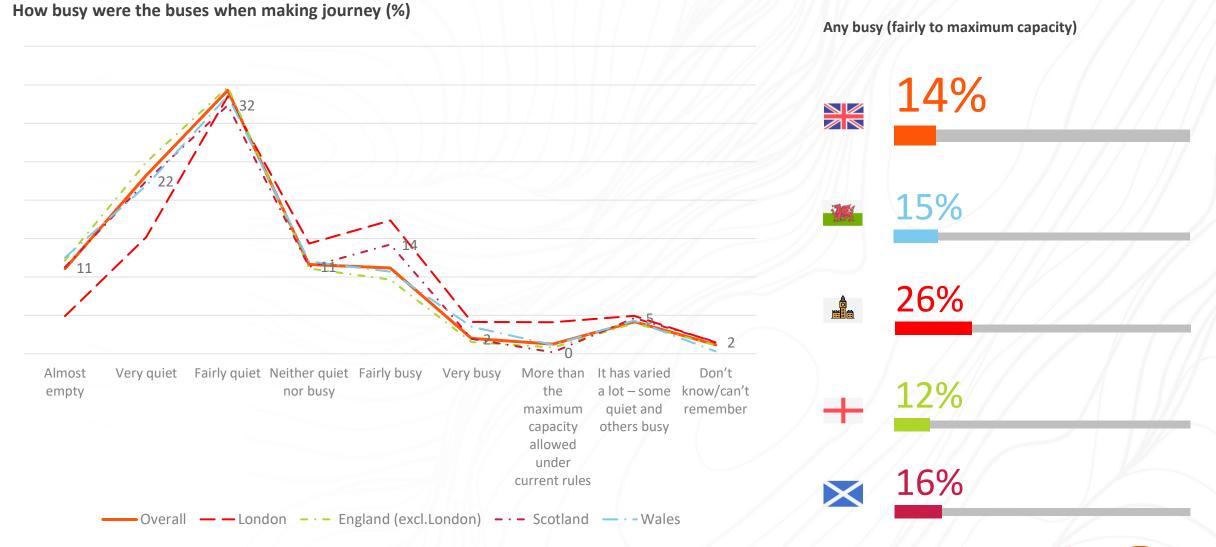






Passengers' feeling of safety is closely related to how full buses were. In London, which recorded the lowest safety feeling, 1 in 4 passengers travelled on busy buses



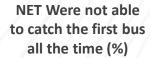


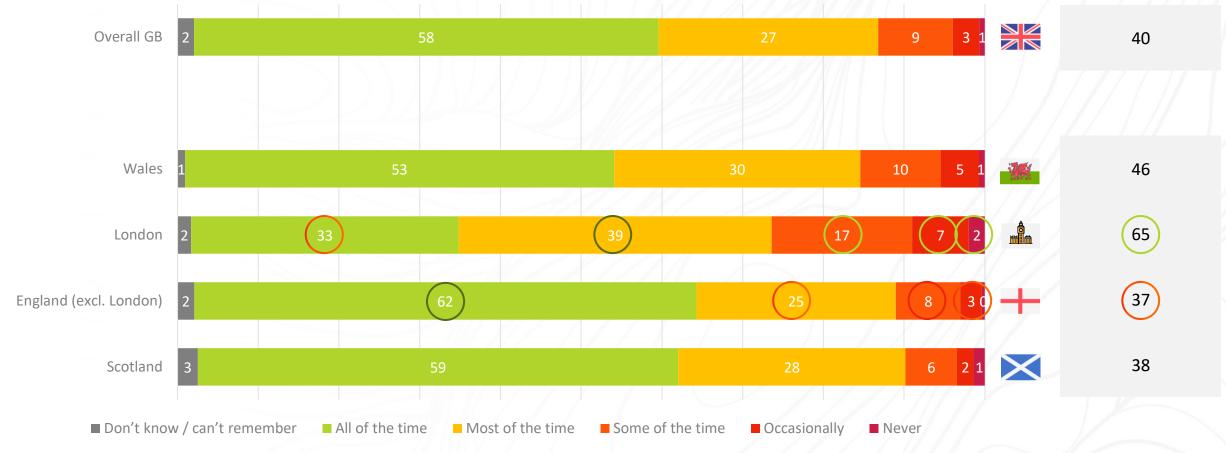


Overall, just under 3 in 5 current users never had an issue with missing their bus because of capacity. Wales records the second highest share of those who were not able to catch their first bus



Able to catch the first bus (%)







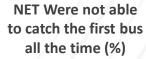


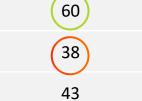
Being unable to catch the first bus was more likely to happen in urban areas of Wales

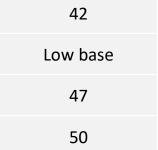


Able to catch the first bus (%)







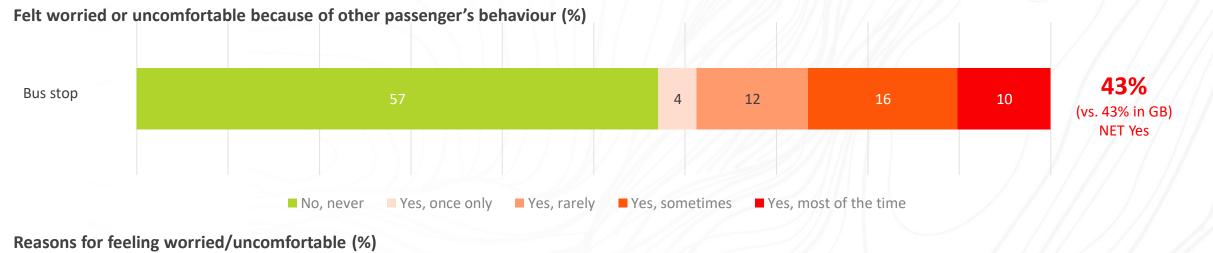




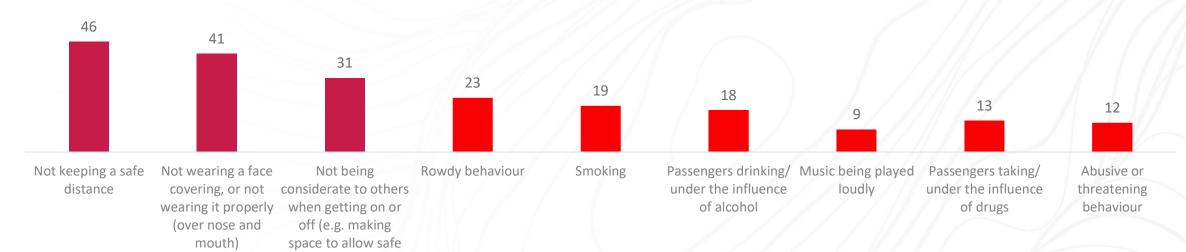


In Wales, two in five passengers felt worried or uncomfortable at the bus stop at some stage over the past year, mainly because of other passengers not complying with COVID-19 rules and regulations









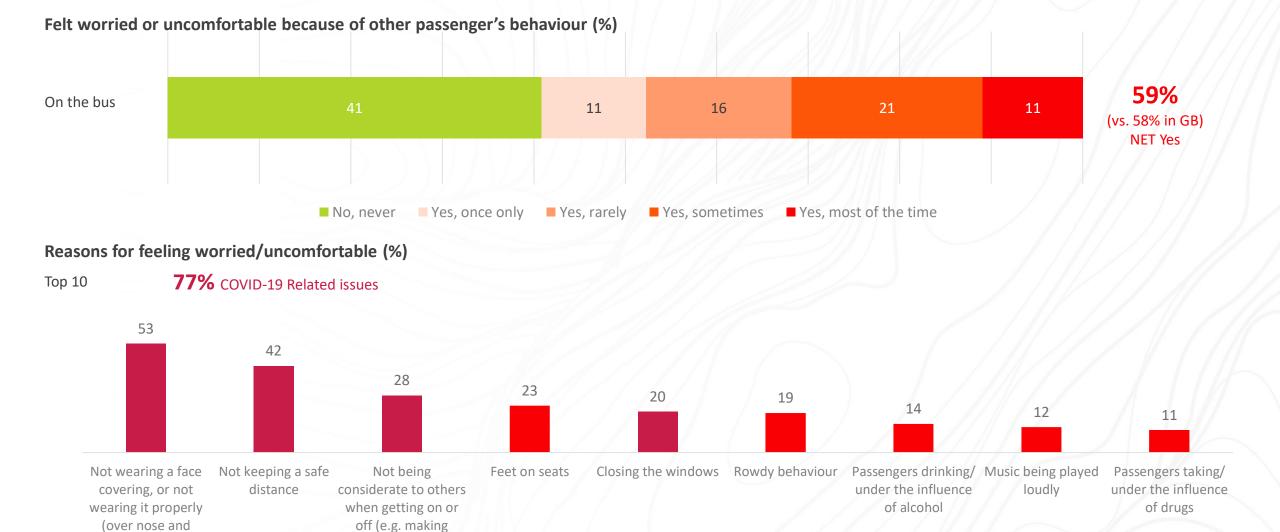




distancing)

On board the bus around 3 in 5 passengers felt uneasy in Wales, with 77% of those attributing it to COVID-19 related behaviour









space to allow safe

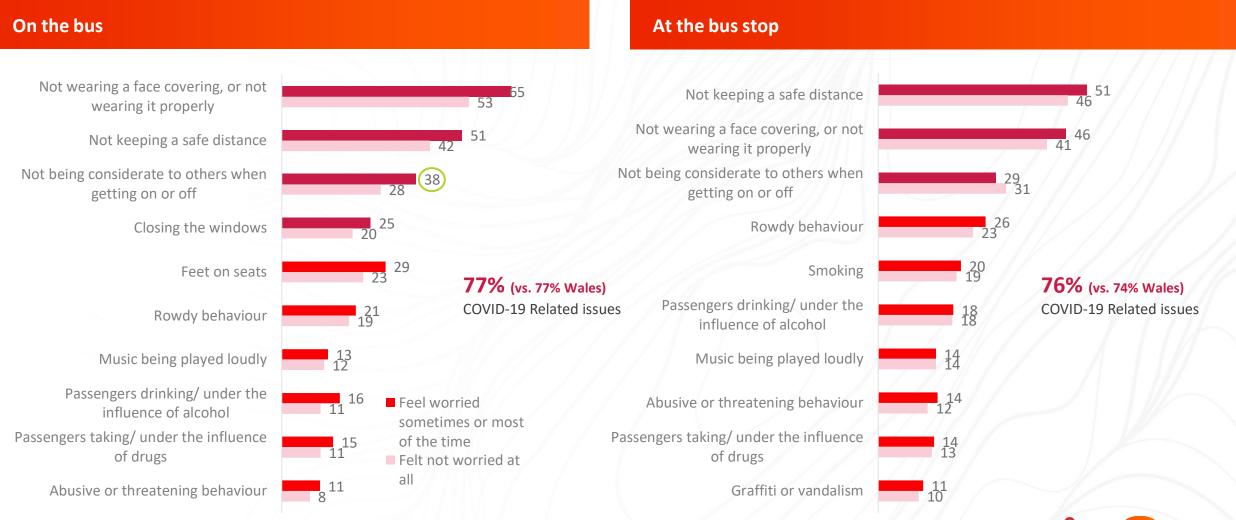
distancing)

mouth)

For those who felt worried <u>sometimes or most of the time</u> either on the bus or at the bus stop the same COVID-19 issues emerge implying these are recurring issues



Top 10







Overall satisfaction with bus journeys during the pandemic is high. Wales scores 84% which makes it the strongest nation. London records the lowest satisfaction but 71% of users are still satisfied



Satisfaction with travelling by bus since COVID-19 (%)



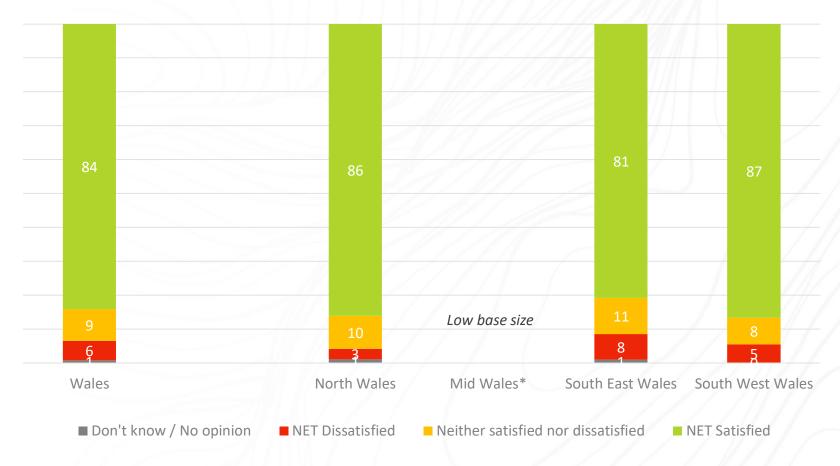




Within Wales, the South West and the North West record the highest satisfaction, while in the South East fewer were satisfied



Satisfaction with travelling by bus since COVID-19 (%)



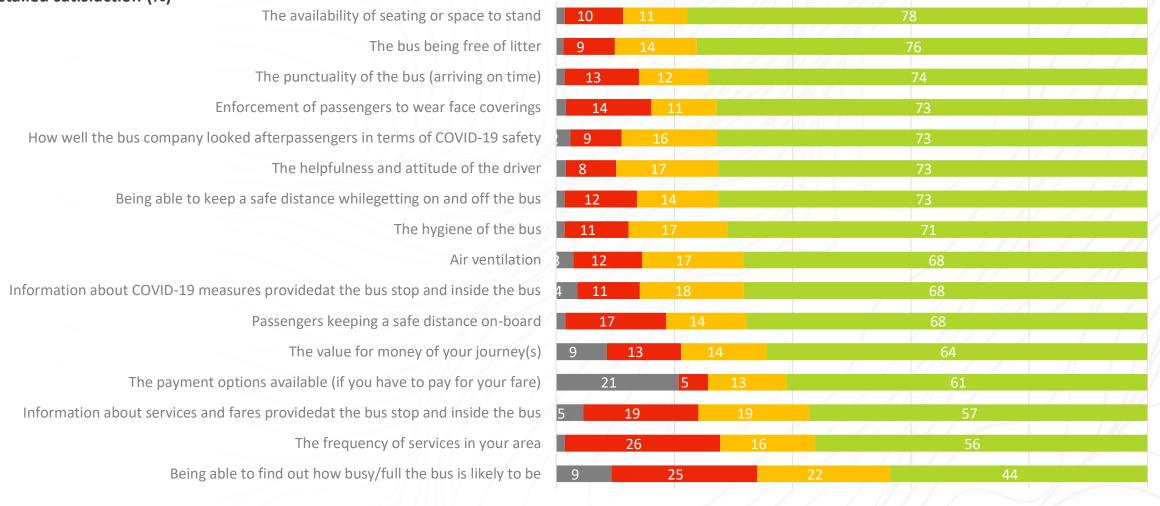




Availability of seating tops the satisfaction metrics in Wales. Similar to Britain, overall passengers want to know in advance how busy the bus is likely to be and this is ranked bottom for satisfaction



Detailed satisfaction (%)



Neither satisfied nor dissatisfied



NET Satisfied



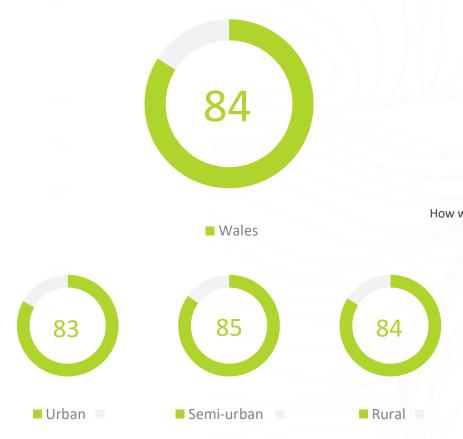
■ NET Dissatisfied

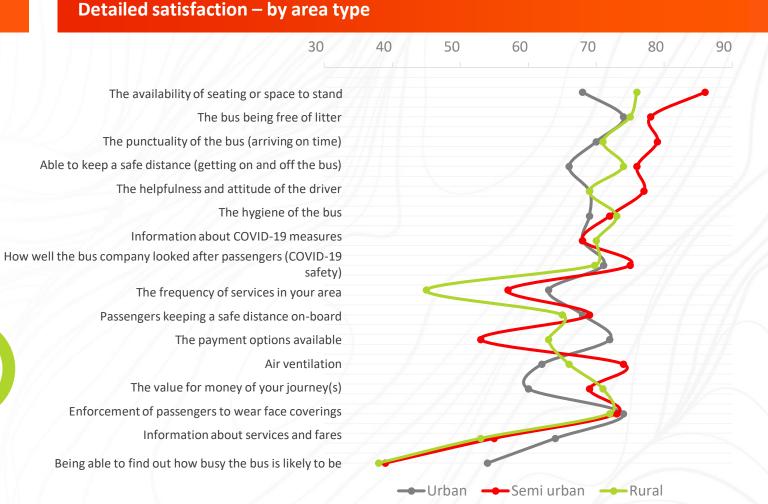
■ Don't know/ no opinion

While overall satisfaction is stable across areas, specific satisfaction metrics vary notably between urban, semi urban and rural



Overall satisfaction – by area type









When asked what could be improved, most passengers highlighted stronger enforcement of COVID-19 rules on the bus and at the bus stop



Improvement to current situation



Stricter controls to ensure that all passengers wore masks unless they were able to prove they were medically exempt

Legal requirement for masks to be worn and powers to enforce

Drivers telling people to wear masks

More information on how busy the services were with live information on an app of how busy the buses were

Anticipation of buses being full - sometimes I could not board the bus and had to wait (raining!). Cancellation of buses at short notice is not too good. Otherwise apps information first class.

Better ventilation as it was a very warm day and with wearing masks it was hard to breathe.





Passengers in semi urban areas were the most satisfied and experienced the quietest buses



How busy the were the buses (%)



	Almost empty	Very quiet	Fairly quiet	Neither quiet nor busy	Fairly busy	Very busy to maximum capacity
Urban	12	18	35	13	9	8
Semi Urban	15	22	34	13	10	2
Rural	9	26	29	9	14	5

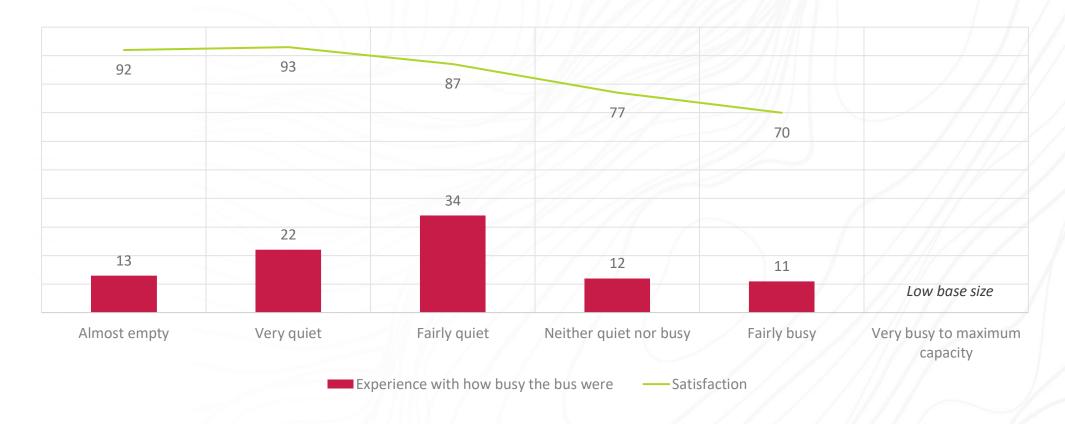




This is because there is a clear correlation between satisfaction and how busy the bus was, as a very busy bus causes satisfaction to drop



Satisfaction based on experience with how busy the bus were (%)



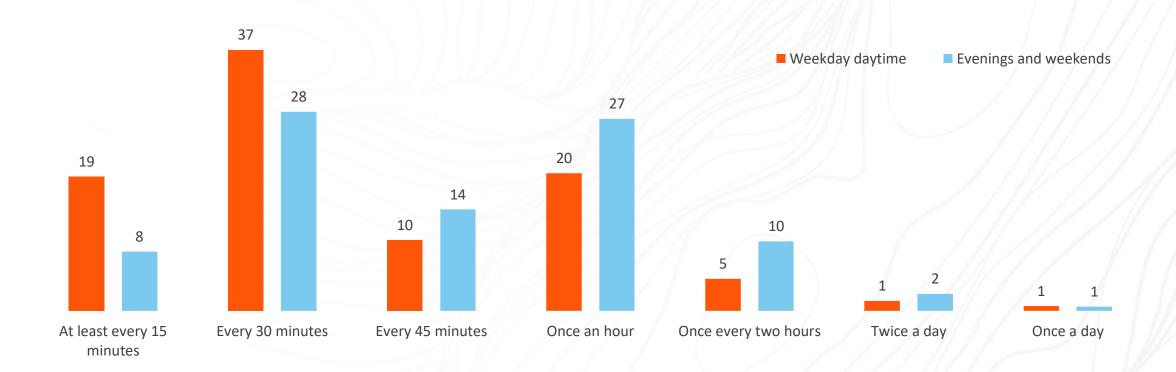




In rural areas, bus users in Wales would typically expect bus services to be every 30 minutes



What would you say is a reasonable frequency of services for bus routes in <u>rural</u> areas of Wales

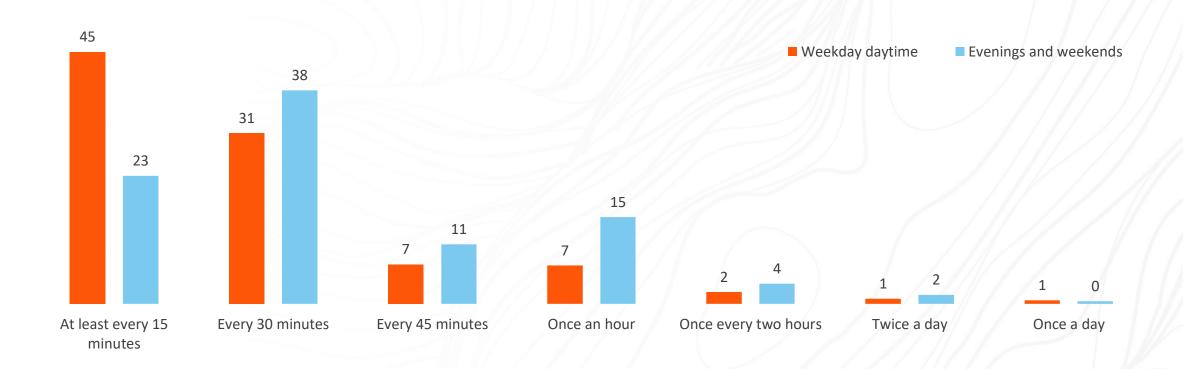




While in urban areas they are likely to expect a bus every 15 minutes, though 30 minutes in the evening or at weekends



What would you say is a reasonable frequency of services for bus routes in <u>urban</u> areas of Wales

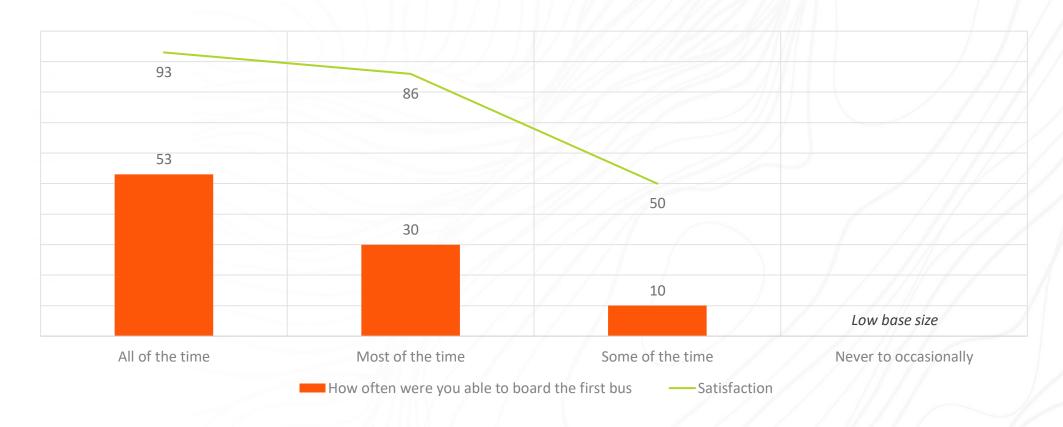




Satisfaction is also closely linked with passengers' ability to board their first bus. For those who never had an issue satisfaction is at 93%



Satisfaction based on experience with being able to board the first bus (%)



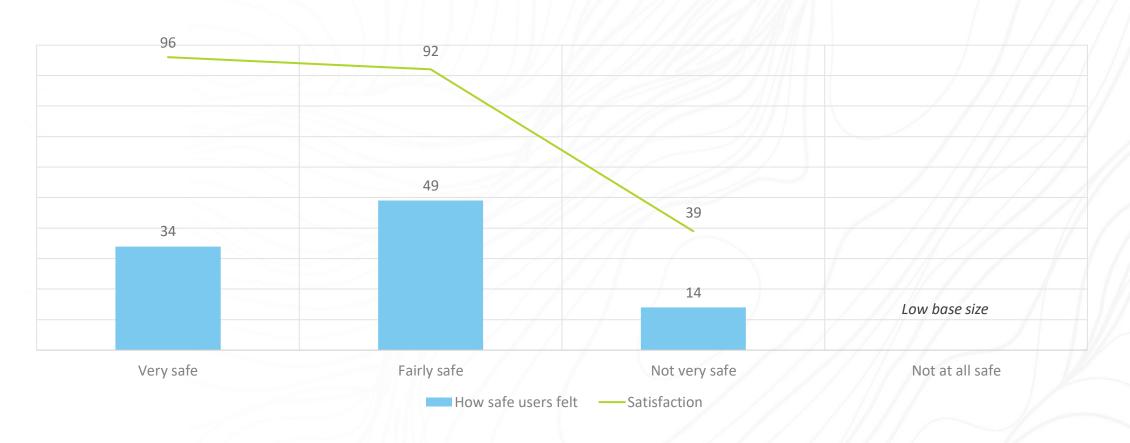




During the pandemic, feeling safe almost equals high satisfaction as both metrics are closely linked



Satisfaction based on how safe passengers felt (%)



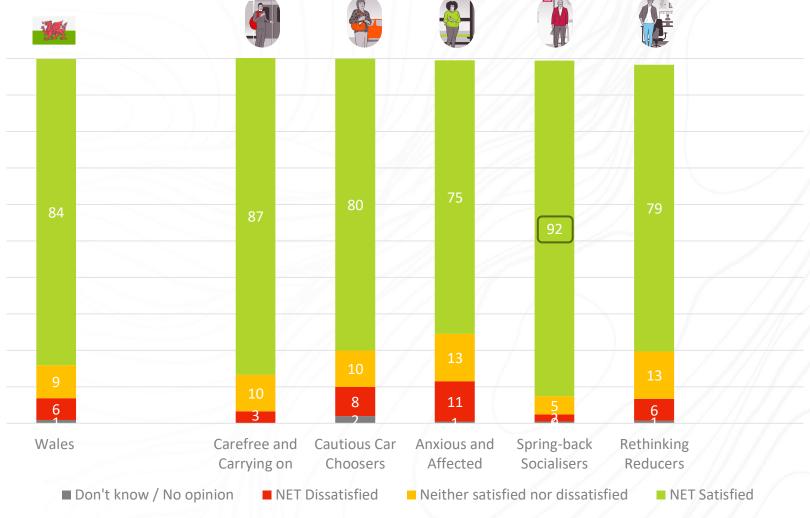




Satisfaction across segments also varies; here Spring-Back Socialisers top the list with 92% satisfied, the Anxious and Affected sit at the bottom with 75% satisfied



Satisfaction with travelling by bus since COVID-19 (%)







The Anxious and Affected are significantly less likely to be satisfied on most metrics. Interestingly, this is also the case for the Carefree and Carrying on while Spring-Back socialisers are generally very satisfied with their experience on the bus



Detailed satisfaction (%)		Carefree and Carrying on	Cautious Car Choosers	Anxious and Affected	Spring-Back Socialisers	Rethinking Reducers
The availability of seating or space to stand	78	69	80	71	88	80
The bus being free of litter	76	68	79	68	89	72
Being able to keep a safe distance	73	70	73	56	84	81
The punctuality of the bus (arriving on time)	74	65	79	65	88	69
The hygiene of the bus	71	67	70	55	88	67
The helpfulness and attitude of the driver	73	65	76	57	90	68
How well the bus company looked	73	67	81	56	89	63
Information about COVID-19 measures	68	68	65	64	72	73
Passengers keeping a safe distance on-board	68	68	72	44	84	66
The frequency of services in your area	56	55	66	43	61	61
Air ventilation	68	64	68	61	82	55
The payment options available (if you have	61	54	71	67	52	75
The value for money of your journey(s)	64	60	72	55	71	63
Enforcement of passengers to wear face	73	65	85	56	84	74
Information about services and fares	57	57	72	45	56	65
Being able to find out how busy/full the bus	44	47	52	28	41	64

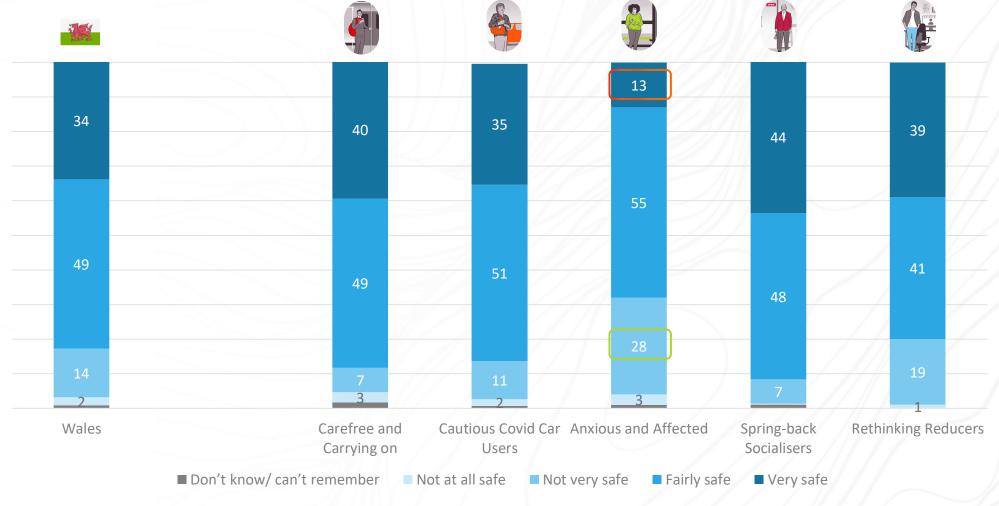




Significantly fewer of the Anxious and Affected have felt very safe on their bus journey during COVID-19







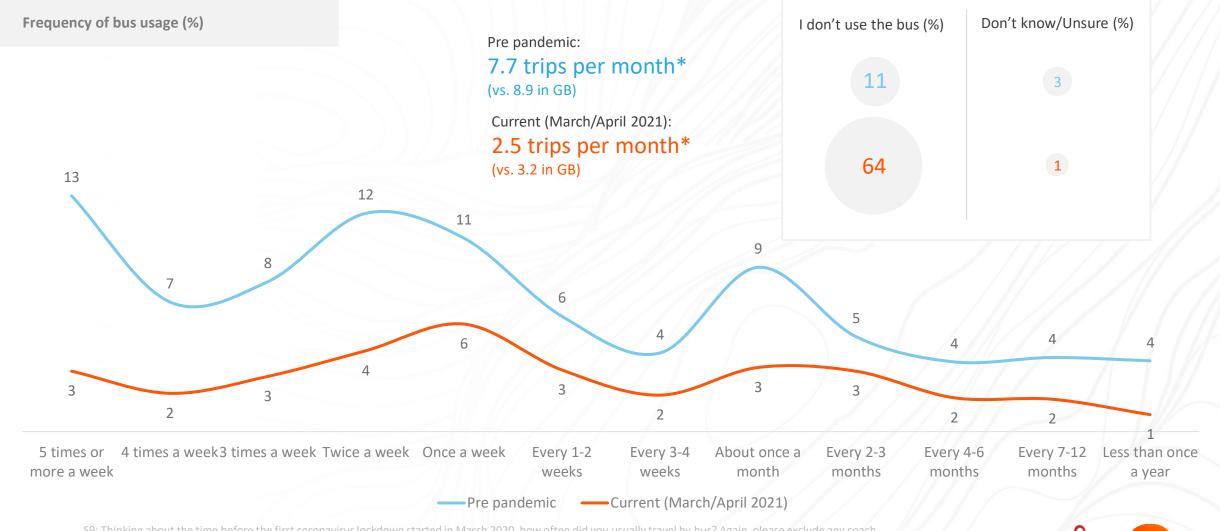






At an overall level, the use of buses has decreased by nearly two thirds since the beginning of the COVID-19 crisis. Travel 5 times or more a week was most impacted by the pandemic





S9: Thinking about the time before the first coronavirus lockdown started in March 2020, how often did you usually travel by bus? Again, please exclude any coach services. S11: How often do you currently use the bus? Base All respondents = 1189

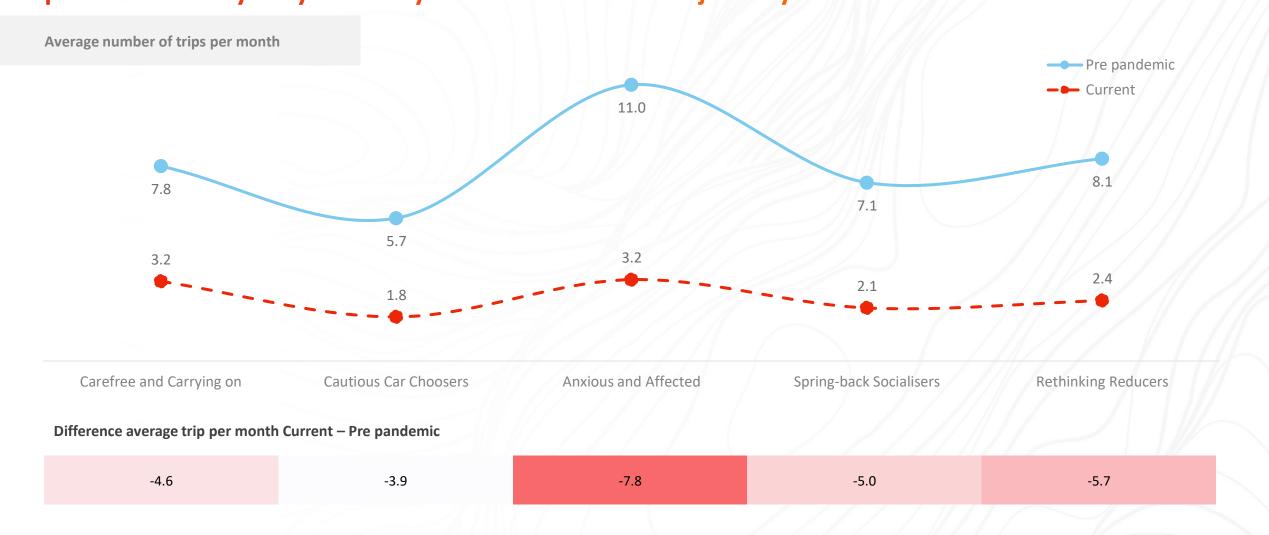
^{*}Average number of trips per month is calculated by assigning a value to each of the time values which reflects their overall value relative to a month. Then an average is taken of these.





The Anxious and Affected were the most frequent users pre pandemic and have reduced their use the most (by nearly 8 journeys a month). Rethinking Reducers show a similar pattern whereby they currently make around 6 fewer journeys a month





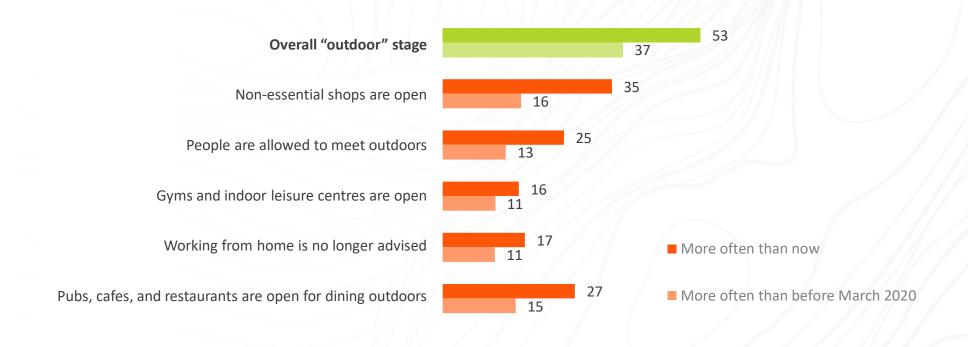




From the various, primarily outdoor, relaxations of restrictions out of the lockdown, the opening of non-essential shops is the strongest driver to increase bus use in Wales



Will travel more than now (%)



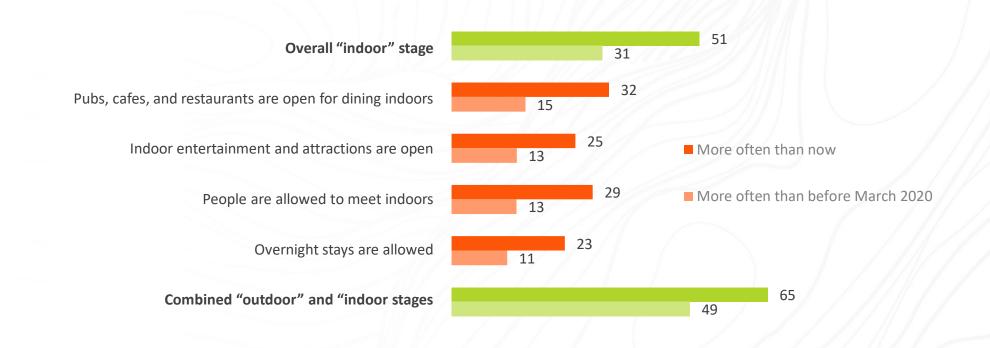




From the various, primarily indoor, relaxations of restrictions out lockdown, the opening of indoor dining and drinking and being able to meet people indoors are the two main factors for increasing bus use in Wales



Will travel more than now (%)



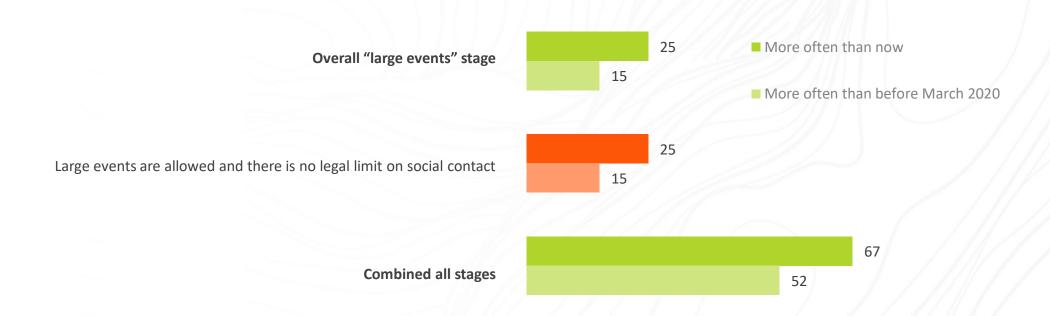




The final release out of lockdown, with large events being allowed and no legal limit on social contact, is not a particularly strong incentive for Welsh passengers to use the bus a lot more



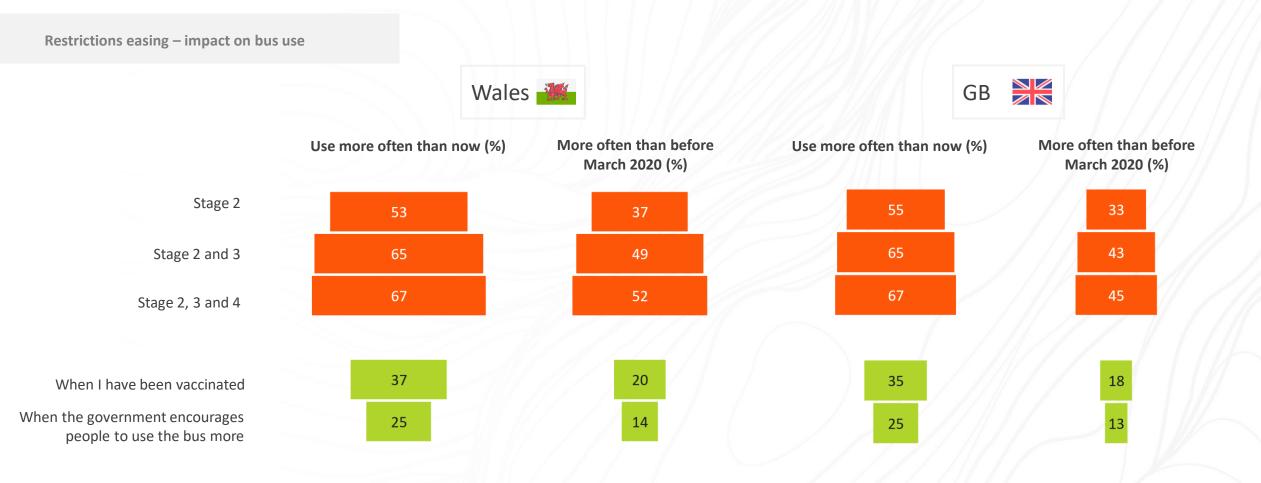
Will travel more than now (%)







In Wales, as more widely across Great Britain, the easing of restrictions has a considerable impact on bus use, even when compared to pre-pandemic

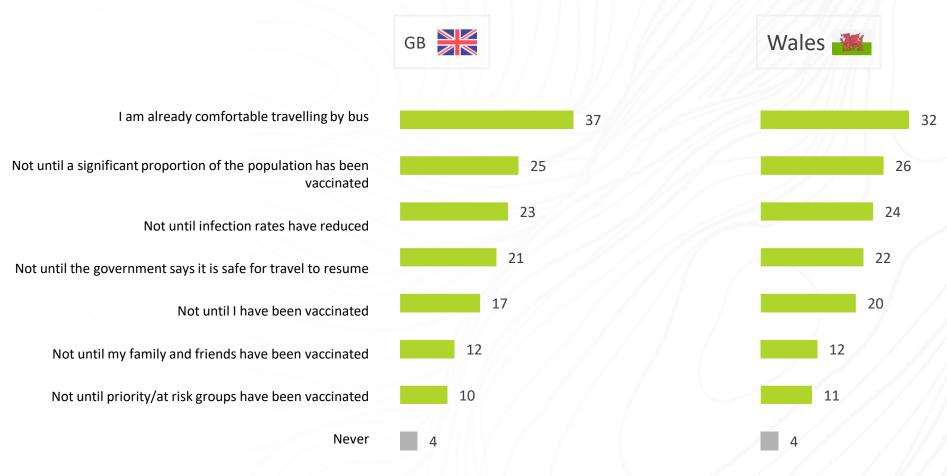




While a third of respondents are already comfortable travelling by bus, vaccinations will play a part in making others feel comfortable too



Vaccinations – impact on bus use

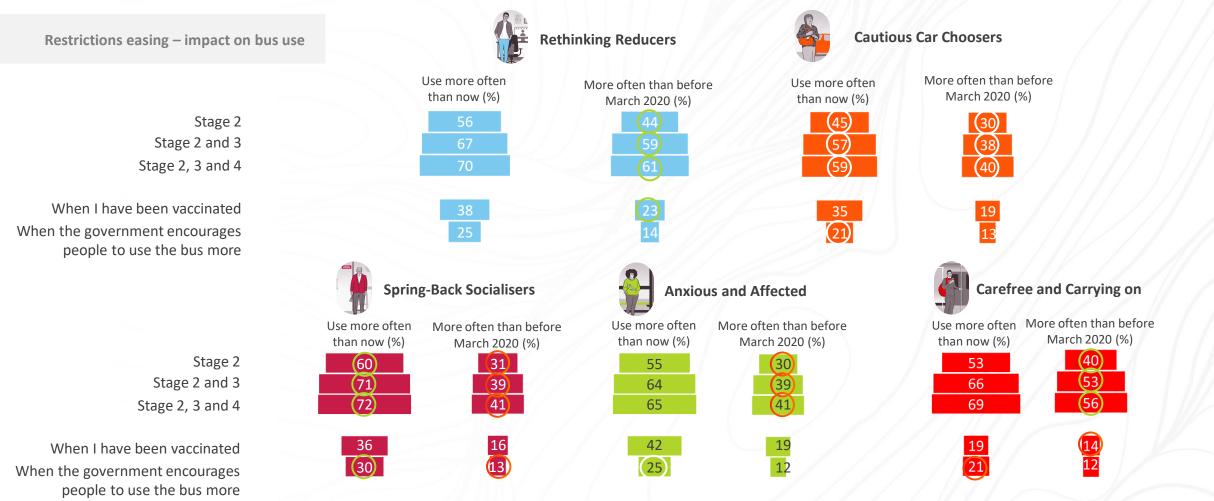






The Spring Back Socialisers will increase their bus use the most across the various stages out of lockdown. Rethinking Reducers show the strongest recovery compared to their usage before March 2020 while for the other segments it is likely to take longer to return to pre-pandemic usage levels



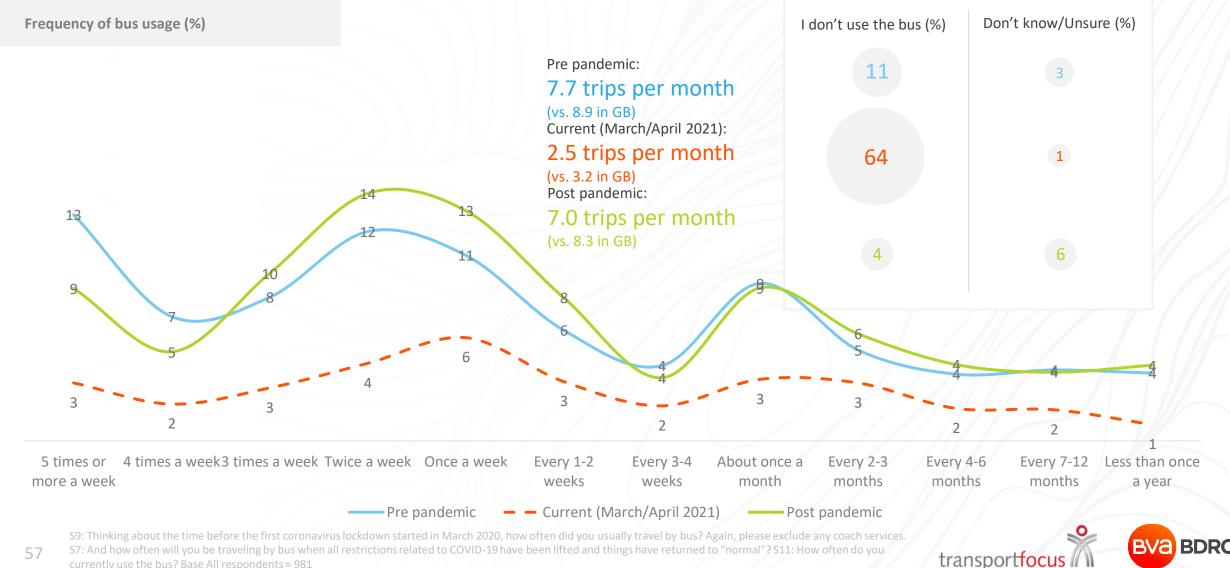






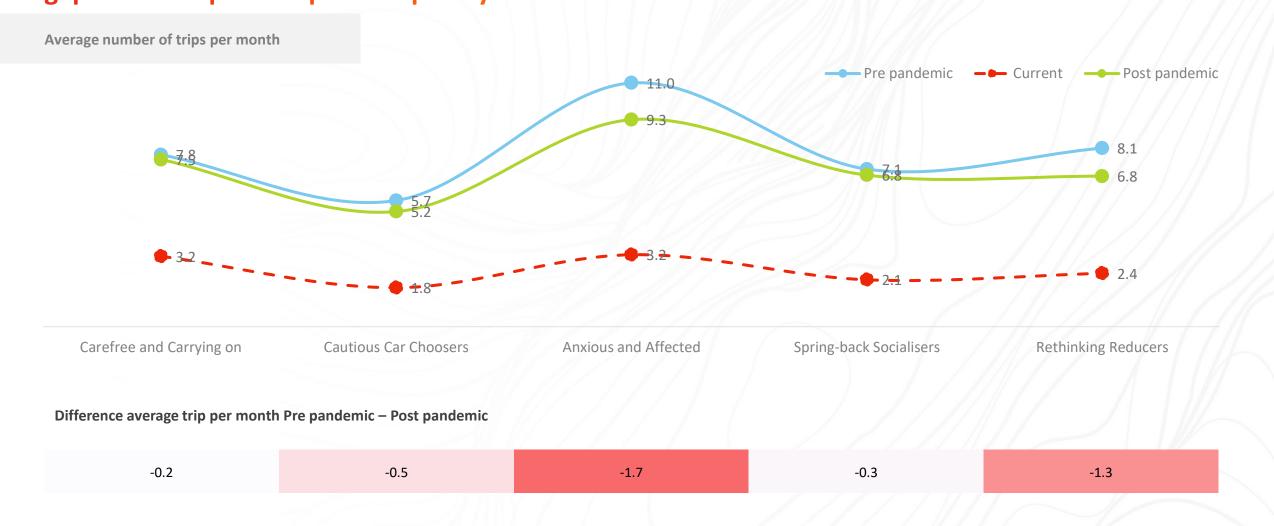
By the end of the pandemic, bus use is predicted to pick up to almost prepandemic levels with nearly all fully lapsed users back on the bus





Among the different segments, the Anxious and Affected and the Rethinking Reducers are those that need more reassurance and encouragement as they record the largest gap between pre and post frequency of bus use





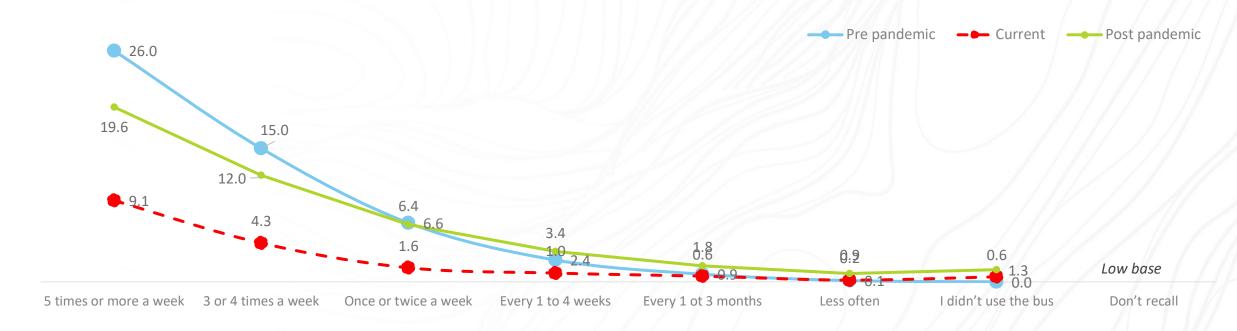




While frequent pre pandemic users are planning on decreasing their use post pandemic, others are actually expecting to increase their use slightly



Average number of trip per month per user frequency (pre pandemic)



Difference average trip per month Pre pandemic – Post pandemic



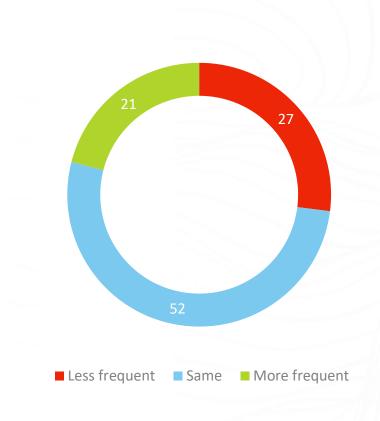




Around a quarter of respondents in Wales intend to decrease their frequency of bus travel post pandemic. Pre COVID-19, these passengers most commonly used single/return tickets or a day pass



Future bus use compared to pre pandemic (%)



Ticket type pre COVID (%)

	England (excl. London	Less frequent	Same	More frequen
A free pass or free journey		26	46	34
A single/return/hopper ticket	31	34	29	32
A day pass	26	33	21	34)
A pass/season ticket for a week or longer period		14	7	16
Not sure or something else	4	6	3	7





The Anxious and Affected and the Spring Back Socialisers are the least likely to plan on increasing their frequency of using the bus compared to pre-pandemic levels



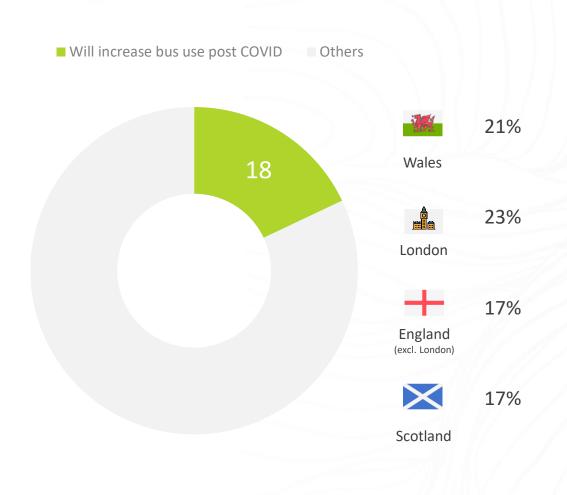
Trip type for increasing bus use post COVID-19 (%) Planning on increasing frequency of bus use **Carefree and Carrying on** 80 10 **Cautious Car Choosers** 16 88 37 11 75 **Anxious and Affected** 82 **Spring-Back Socialisers** 2 33 82 **Rethinking Reducers** ■ Commuting ■ Business ■ Leisure

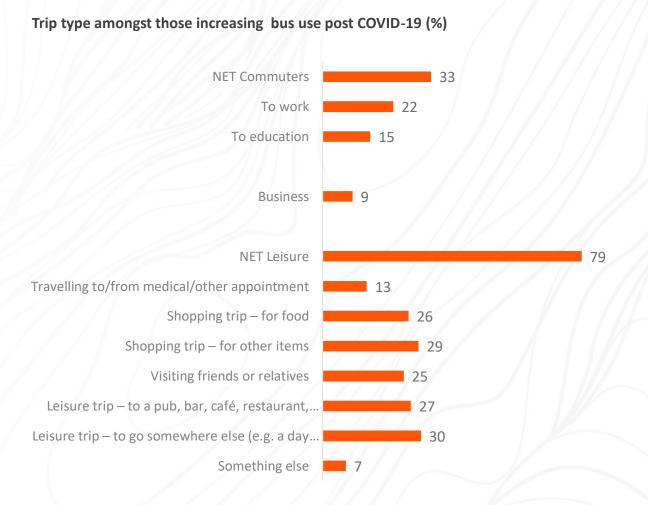




Leisure trips are by some margin the main reason for using the bus more often once the pandemic is over. The challenge for the industry is therefore to understand how to ensure this is maintained in the longer term







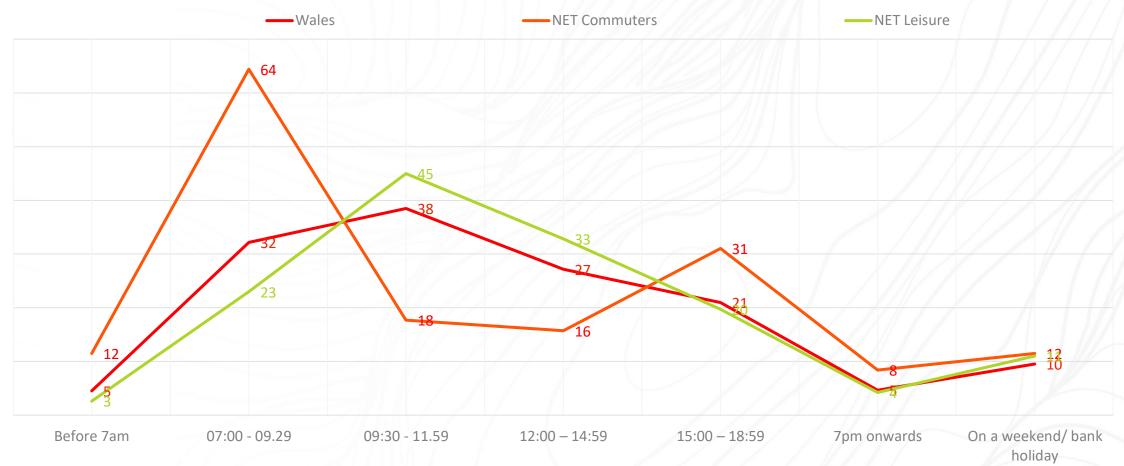




The most popular time slot for additional journeys is between 09:30-11:59, driven by leisure travellers, while additional commuter journeys will be heavily concentrated on the morning peak



Time of trip amongst those increasing bus use post COVID-19 (%)

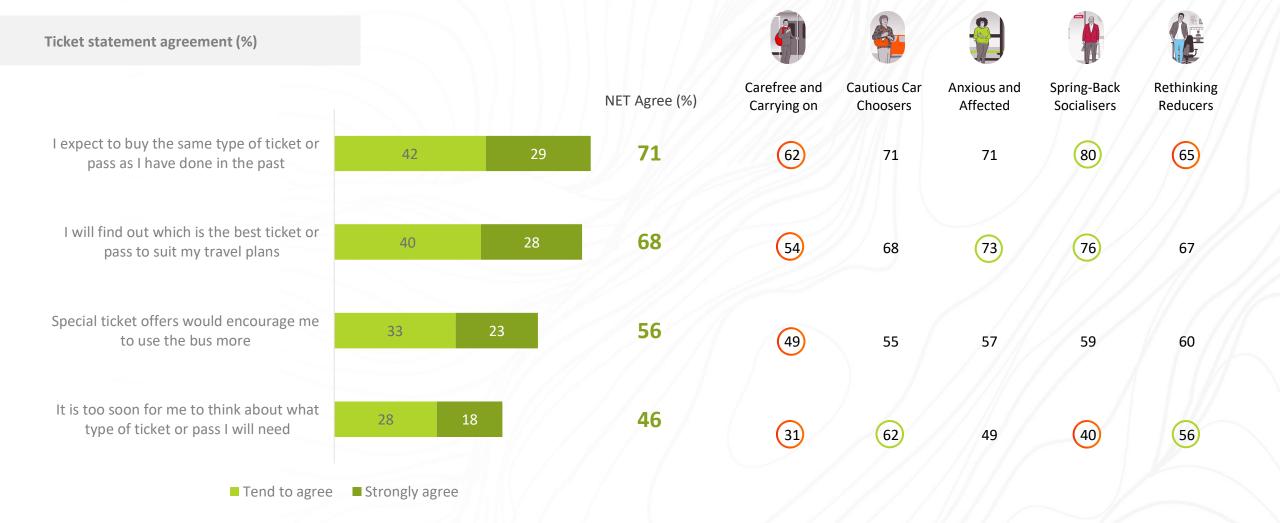






Many lapsed users when they return will be reviewing which ticket to buy or will be looking for special offers for their future bus use





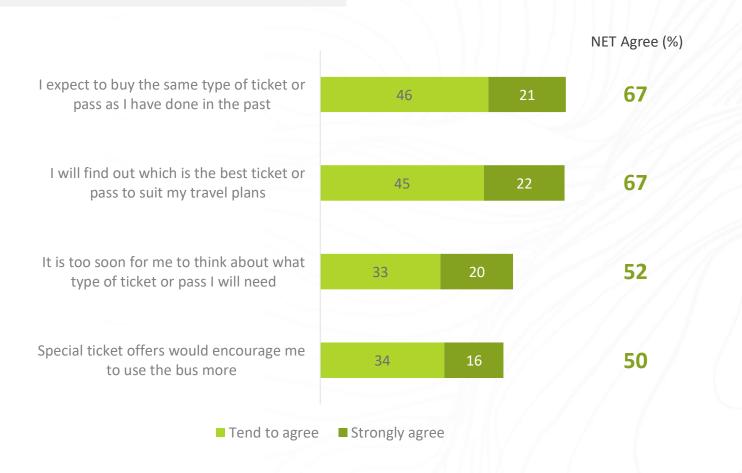




The same is true for Wales, where buying the same ticket or finding the best ticket to suit travel plans are the main ways bus users will buy tickets in the future



Ticket statement agreement (%)



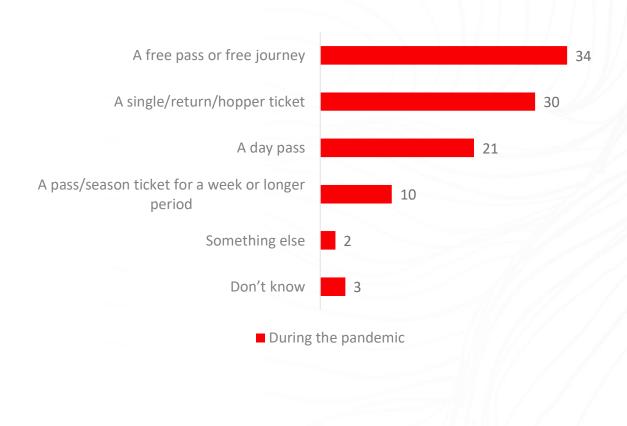


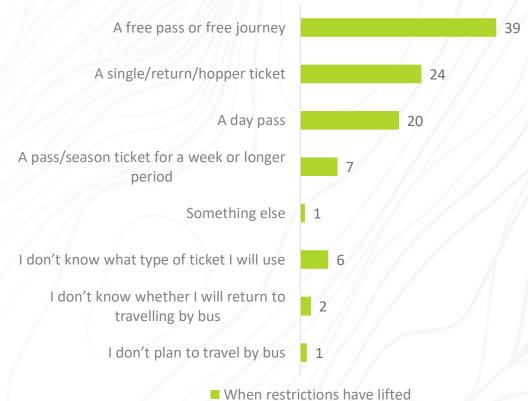


Free pass or free journey tickets will account for the same or a bigger share than they currently do whilst single/return/hopper tickets look set to decline in their share of use



Ticket type for travel in the future (%)



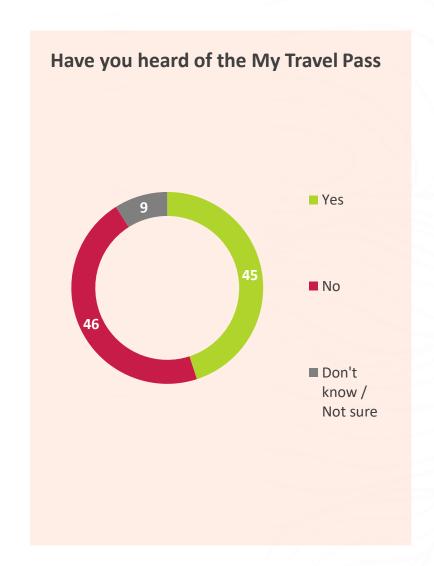


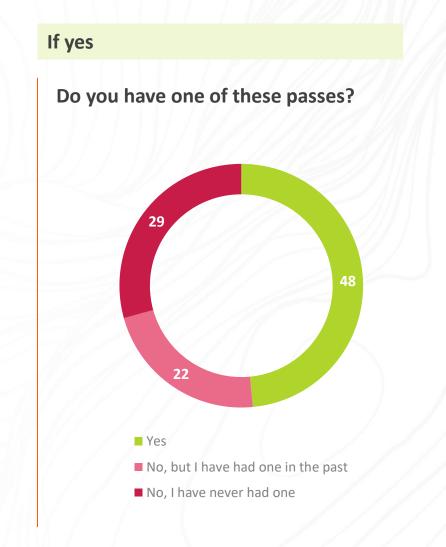




Nearly half of bus users aged 16 to 21 have heard of the My Travel Pass and of these just shy of 7 in 10 used to have or currently have one for their bus travel









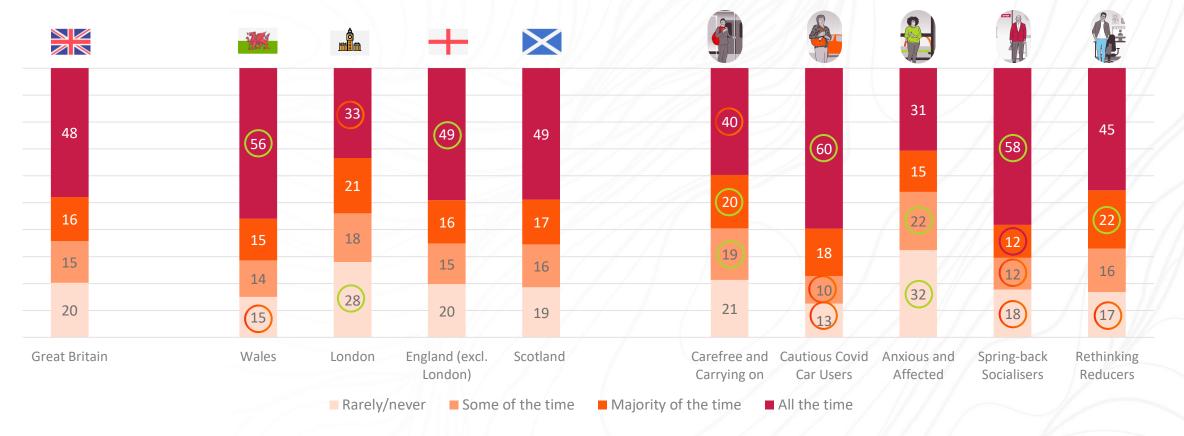




Currently just under half of respondents have access to a car all the time. In Wales, respondents are significantly more likely to have a car. The Cautious Car Choosers and Spring Back Socialisers are also more likely to have a car readily available whilst the opposite is true for the Anxious and Affected



Made by a bus journey with a different type of transport (%)



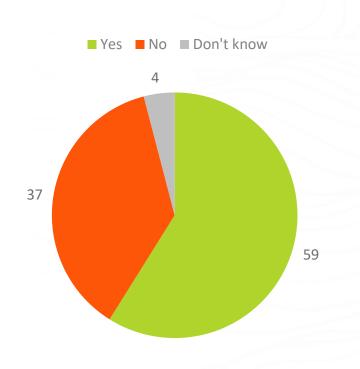


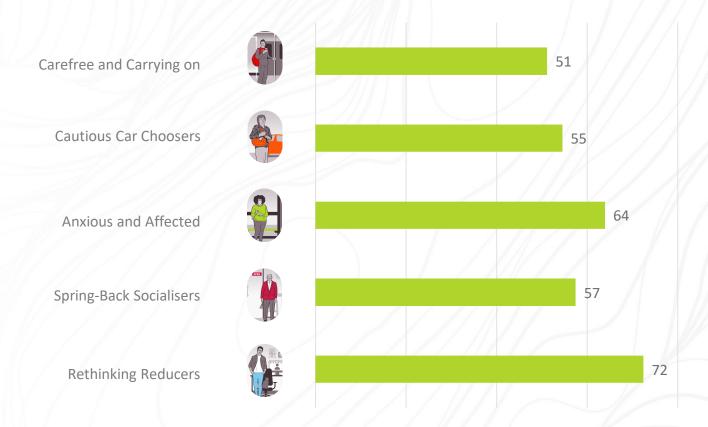


In Wales, the majority of bus users opted for another type of transport (including walking) since the beginning of the COVID-19 crisis. This was seen most commonly among the more cautious segments



Made a bus journey with a different type of transport



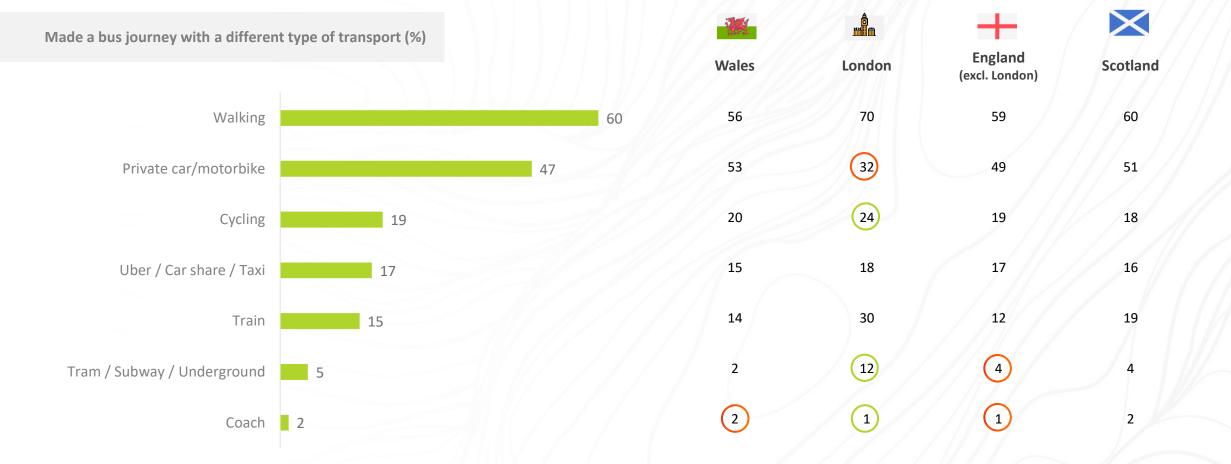






Walking is the main substitute to taking the bus. The car comes second but is less commonly used in London; across the nations around half used the car instead of the bus



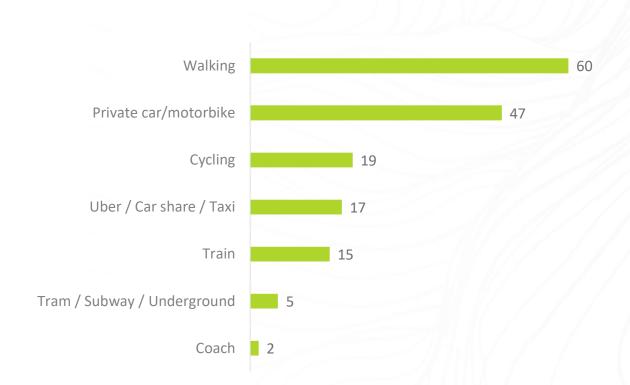




When bus users switched modes for commuting or business trips, they were more likely to cycle or use the train than for other journey types



Made a bus journey with a different type of transport (%)



Made a bus journey with a different type of transport for a specific journey (%)

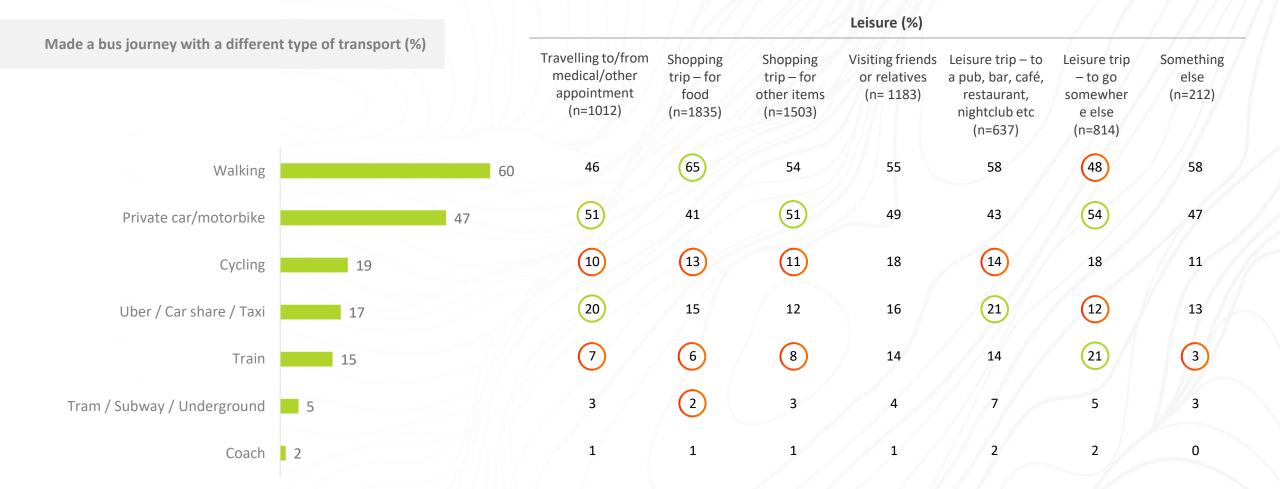
Comr	Business		
Work	Education	. ///	
54	54	51	
39	37)	43	
23	30	27	
16	12	17	
18	22	24	
7	7	9	
2	3	1	





For leisure journeys, the change in modes was driven by the purpose of the journey. When shopping for food, passengers where more likely to walk there. For trips further away the car was favoured



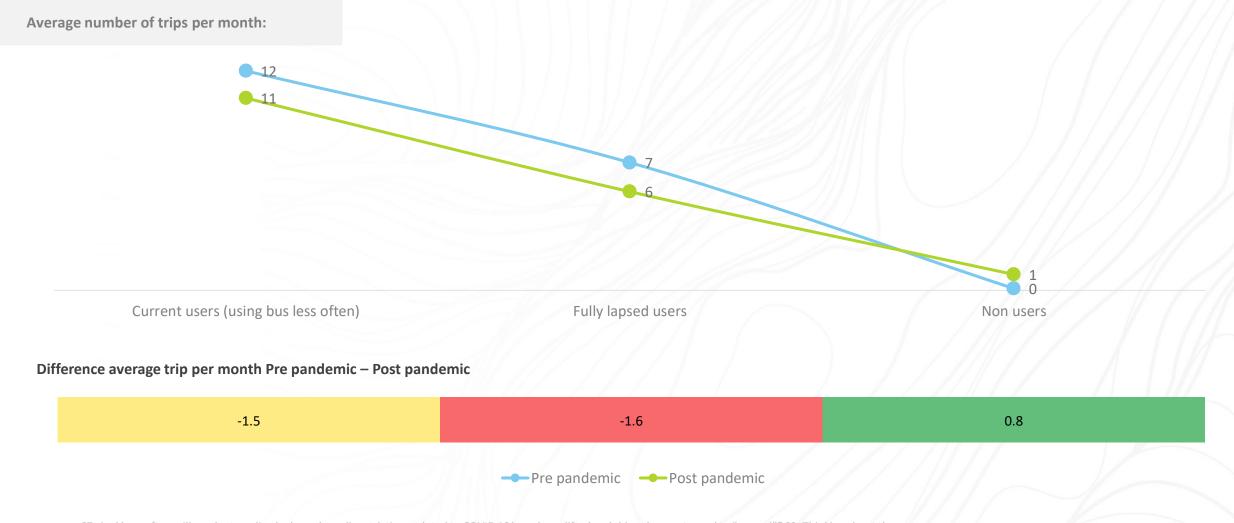






Current users, who have been using the bus less often during the pandemic are expected to continue the trend of reduced usage post pandemic. Lapsed users are also likely to reduce their usage compared to pre pandemic







Reviewing the experience of current users who have reduced their usage during the pandemic

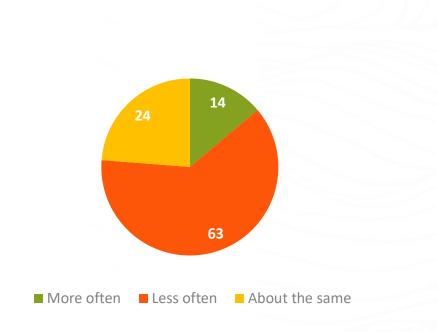


2 in 3 current users have been using the bus less often during the pandemic and such a reduction emerges across all segments, more so amongst the Anxious and Affected where 75% have decreased bus usage



Frequency of travel (%)

Pre-pandemic compared to during the pandemic









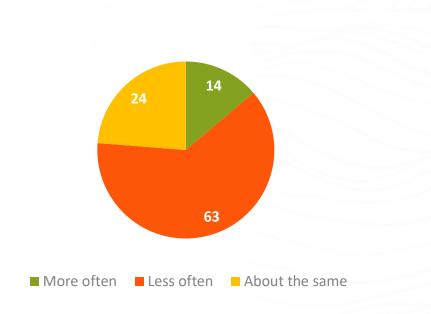
Those current users who live in semi-urban or rural areas are more likely to have reduced their bus use than urban bus passengers

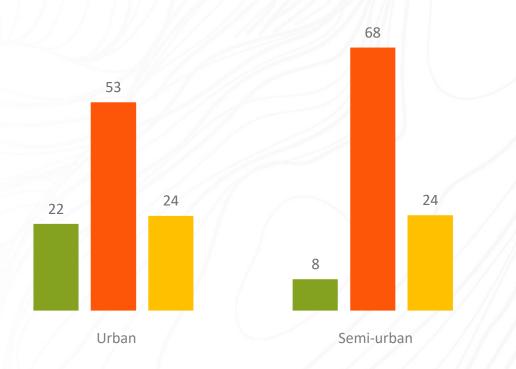


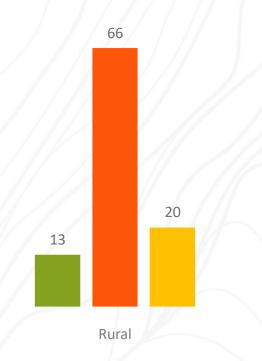
Frequency of travel (%)

Frequency among segments (%)

Pre-pandemic compared to during the pandemic





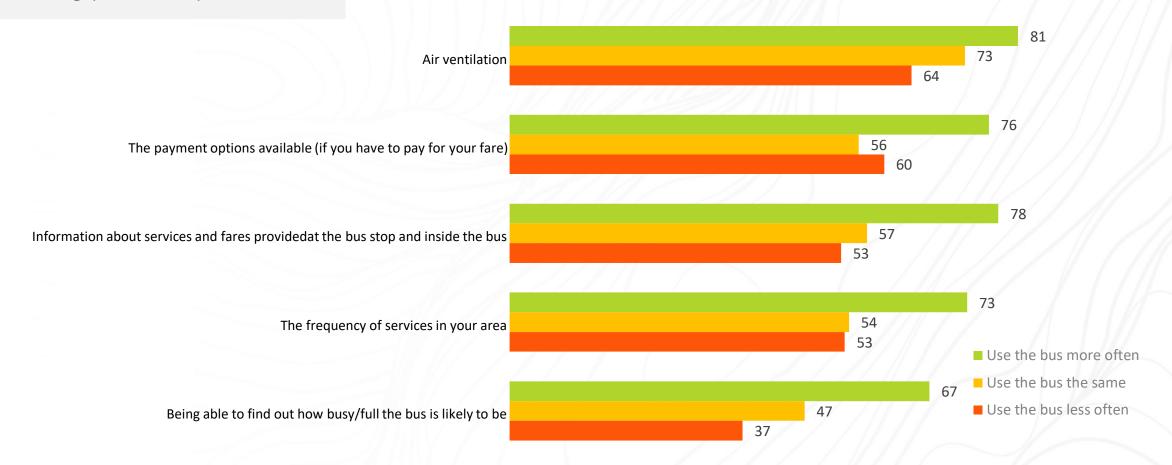




Reduced bus users are less satisfied with several aspects of their journeys compared to those who have increased bus usage, but are on a par with those who have kept their use the same (except on ventilation and finding out how busy the bus is likely to be)



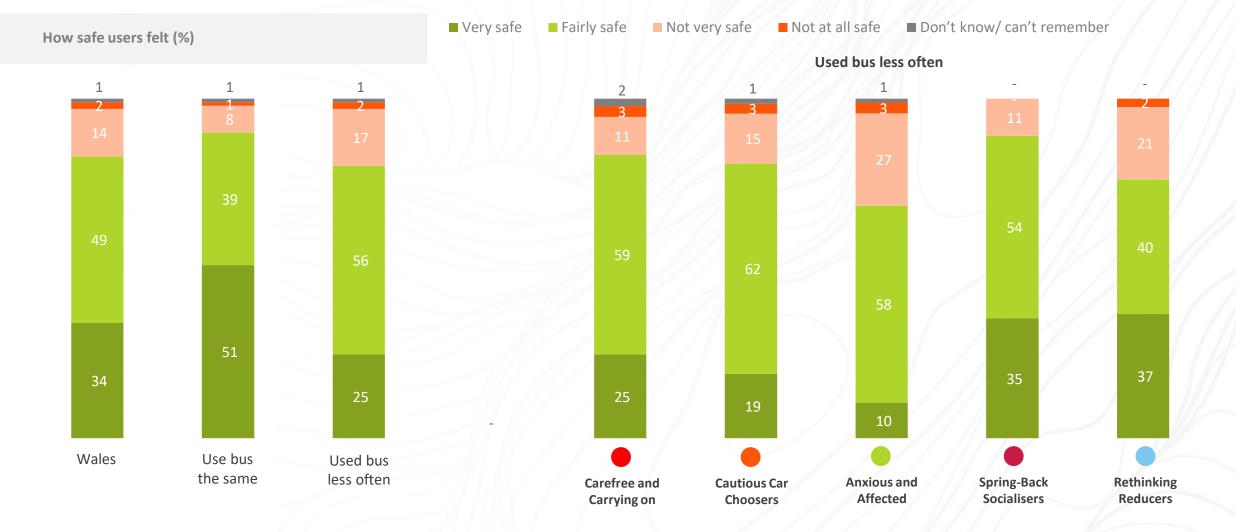
Satisfaction ratings (% NET satisfied)





Those using the bus less often were less likely to feel safe making their journeys than those using the bus as often as they did before March 2020, and this was most apparent amongst the Anxious and Affected









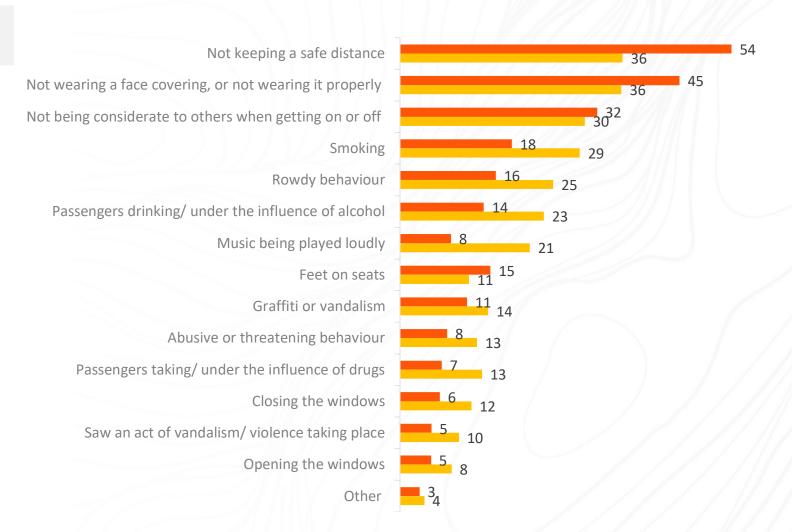
COVID-19 specific reasons are largely responsible for feeling worried at the bus stop among those who have reduced their bus use



■ Used bus less often

Use bus the same

At the bus stop (%)







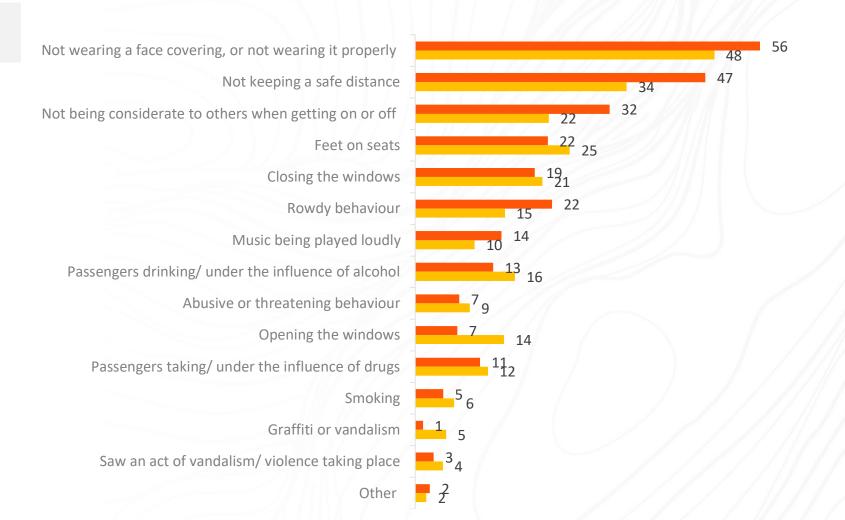
This is a similar story when on the bus where non-wearing of face coverings is the greatest cause for concern



■ Used bus less often

Use bus the same

On the bus (%)



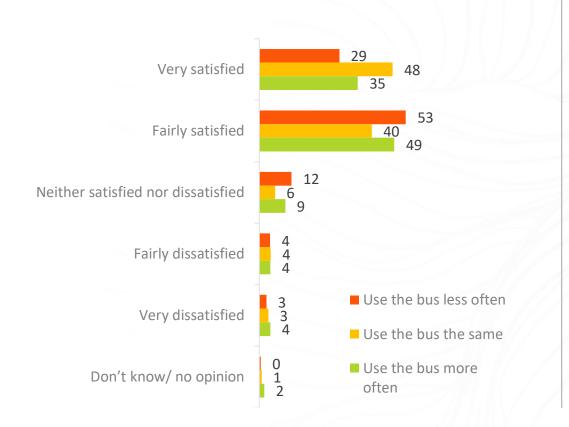




Significantly fewer of those who use the bus less often were 'very satisfied' compared to users who are using the bus as often as before the pandemic



Satisfaction with bus journey (%)





They did the best they could given the situation at hand, I can't fault them.



Having more frequent services to ensure that the bus isn't too full for people to socially distance



More control over passenger numbers and running the reduced service on time



To make sure the exempt ones are except and not tell them confusing statements and change your minds when you feel like it and make sure people are all following rules



Information about bust times and changes to timetables and services being put on the bus stops.



There should be an indication at the bus stops as to when the next bus is due



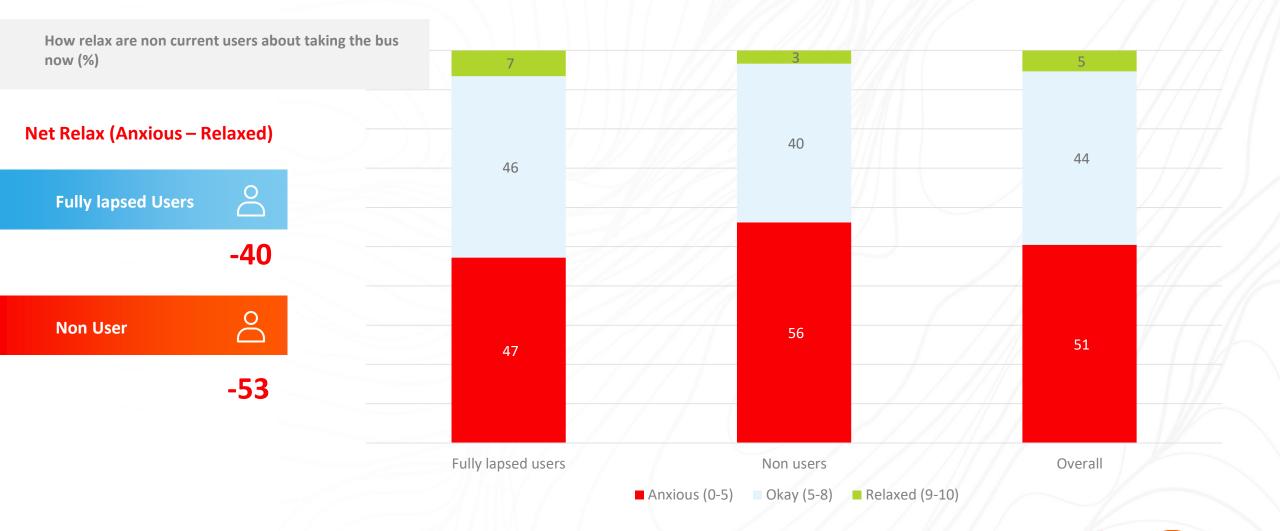


Non-users and lapsed users – reasons for not travelling by bus and future usage



Respondents that have not used the bus since the first lockdown in March 2020 are generally not so relaxed about taking the bus currently especially non users









For fully lapsed passengers, the reasons for not using the bus anymore are mainly due to concerns with COVID-19, while for non-users other reasons unrelated to COVID-19 also play a part



Reasons for reducing or not using the bus since March 2020





In fact, non-users are significantly more likely to say another mode of transport is more convenient, potentially linked to concerns around journey length and the availability of bus services



Reasons for reducing or not using the bus since March 2020 ■ Fully lapsed users Non users Current users (using but less often) 32 24 24 18 11 12 10 11 Travelling by Too unreliable Not convenient Poor frequency of Overall journey Another reason None of the above Too Fares too Poor value for No bus services another mode is crowded/difficult complicated money when when travelling close to where I bus takes too long travelling with with luggage live / where I want more convenient to get a seat others to go



Looking ahead to the summer both user types are a little more confident, with fully lapsed feeling more relaxed about using the bus than non users



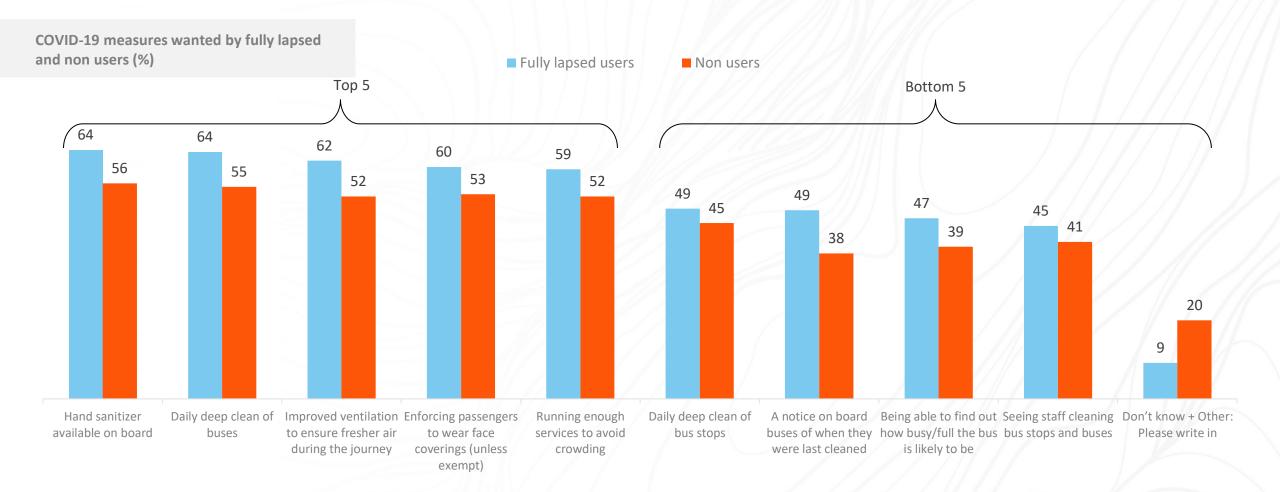






While COVID-19 is still present, measures in place to minimise the spread, such as sanitiser and deep cleaning are what these two user groups would most like to see

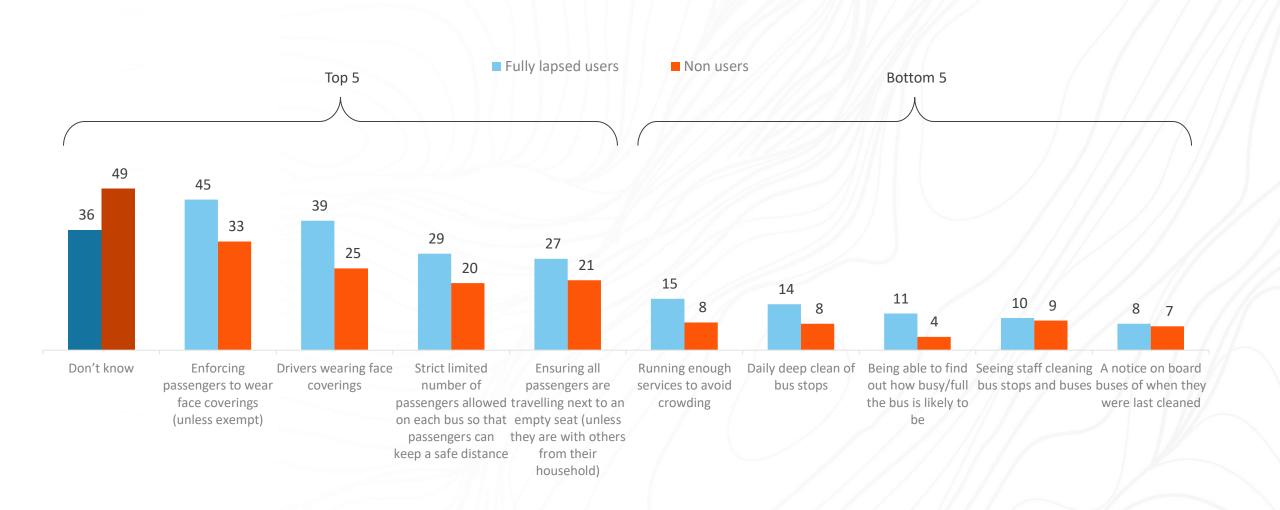






A better understanding of what is already in place on the buses is needed, as almost half of non users are unaware of the measures that have been implemented



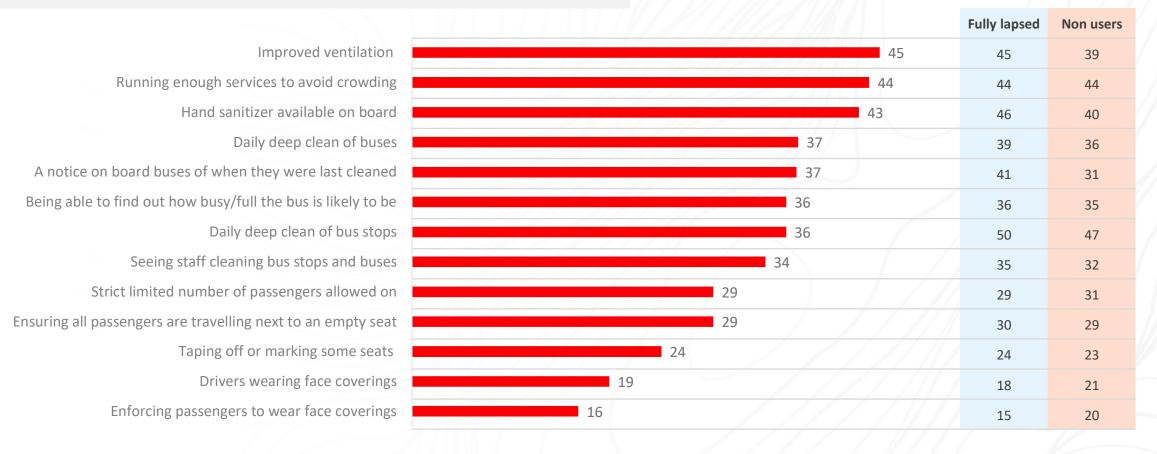




The 'need gap' shows that improved ventilation, crowd control and sanitising is what people want to see but they are not always aware that these are in place



Need gap (% of what respondents want to see minus % of what they think is currently in place)





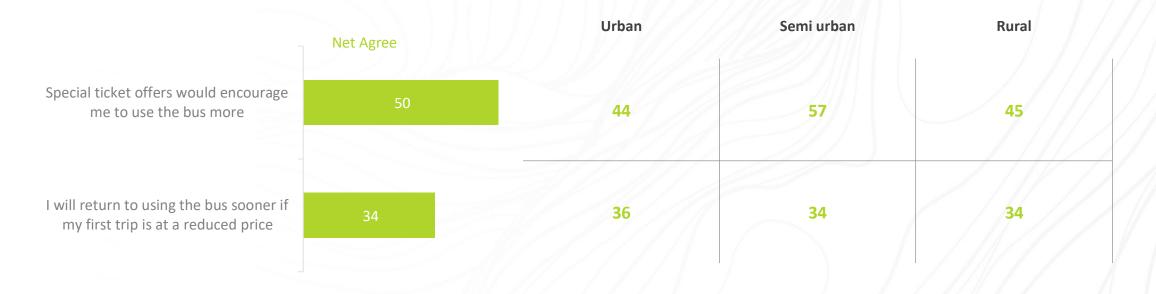




Special ticket offers will encourage a large share of lapsed users to use the bus more than now, a little more so in semi-urban areas



Ticket statement agreement amongst lapsed users (%)







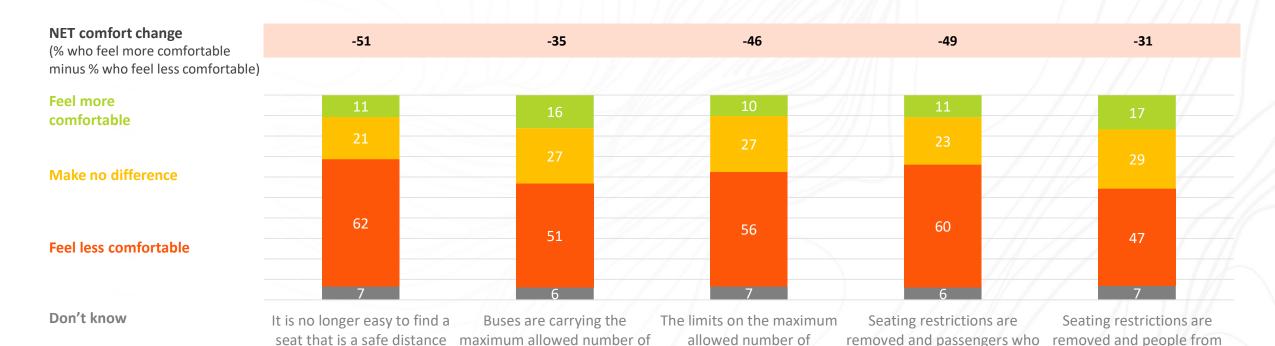
The easing of social distancing measures on buses will result in considerably greater discomfort amongst lapsed and reduced users

passengers under Covid

restrictions



Impact on comfort levels amongst all users (%)



passengers are returned to those before the pandemic



you do not know are allowed

to sit next to you



outside your household who

you know (such as friends or family) are allowed to sit next to you

from other passengers

For a notable proportion these changes will result in lower frequency of use



Impact on frequency levels amongst all users (%)



Don't know

It is no longer easy to find a seat that is a safe distance from other passengers

Buses are carrying the passengers under Covid restrictions

maximum allowed number of allowed number of passengers removed and passengers who are returned to those before you do not know are allowed the pandemic

Seating restrictions are to sit next to you

Seating restrictions are removed and people from outside your household who you know (such as friends or family) are allowed to sit next to you

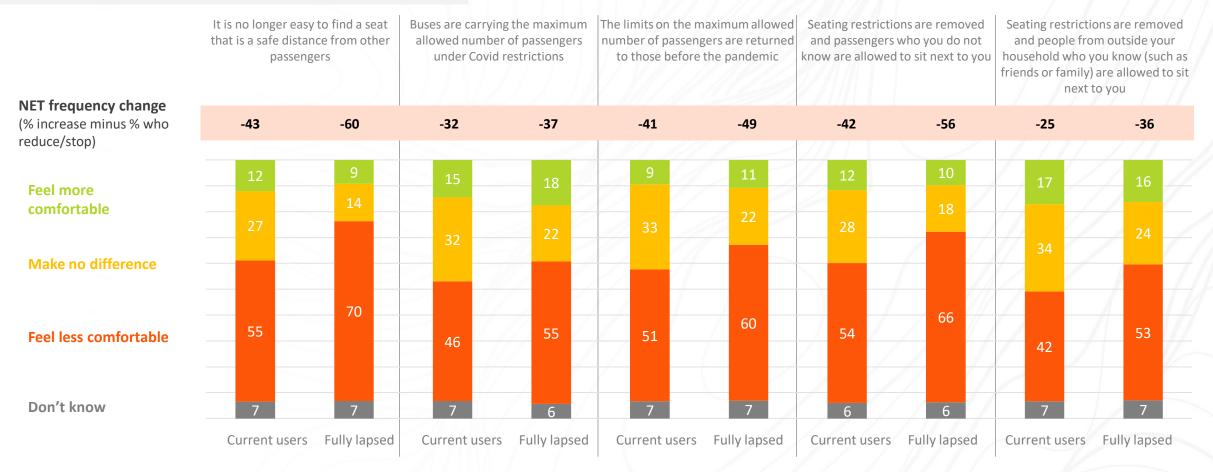




In Wales fully lapsed users are more likely to say they will feel less comfortable when any changes are introduced than current users



Impact on comfort levels amongst all users (except non-users) (%)







... and fully lapsed users are more likely to reduce their bus use as a result



Impact on frequency levels amongst users (%)

Seating restrictions are removed and people from outside your The limits on the maximum allowed It is no longer easy to find a seat Buses are carrying the maximum Seating restrictions are removed that is a safe distance from other allowed number of passengers number of passengers are returned and passengers who you do not household who you know (such as under Covid restrictions to those before the pandemic know are allowed to sit next to you friends or family) are allowed to sit passengers next to you **NET frequency change** (% increase minus % who -33 -47 -24 -36 -29 -15 -24 -21 -30 -41 reduce/stop) **Increase frequency** Same frequency 30 Low frequency 26 24 24 23 22 21 20 Stop using 17 15 26 26 19 18 19 13 14 10 9 9 Don't know Fully lapsed Fully lapsed Fully lapsed Fully lapsed Current users Fully lapsed Current users Current users Current users Current users





Across the segments, the most likely to reduce their bus use as a result of these changes are Cautious Car Choosers, Anxious and Affected and Rethinking Reducers



NET frequency change (% increase minus % who reduce/stop)



Rethinking Reducers



Spring-Back Socialisers



Anxious and Affected

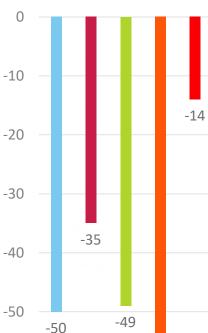


Cautious Car Choosers

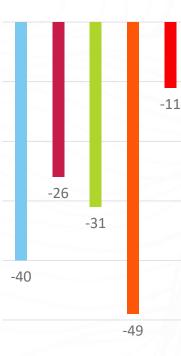


Carefree and Carrying on

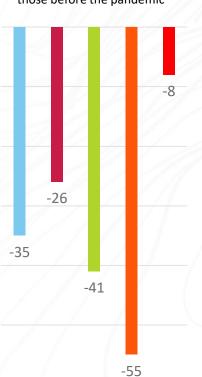
It is no longer easy to find a seat that is a safe distance from other passengers



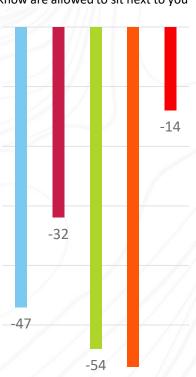
Buses are carrying the maximum allowed number of passengers under Covid restrictions



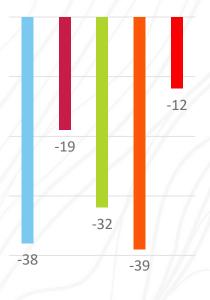
The limits on the maximum allowed number of passengers are returned to those before the pandemic



Seating restrictions are removed and passengers who you do not know are allowed to sit next to you



Seating restrictions are removed and people from outside your household who you know (such as friends or family) are allowed to sit next to you



Q5_4. What difference, if any, will the following have on your overall experience of travelling on the bus? Base Carefree and Carrying on n= 170, Cautious Car Choosers n= 161, Anxious and Affected n= 179, Spring-Back Socialisers n= 232, Rethinking Reducers n= 112



At an overall level, what is most important for increasing bus use is to ensure the buses are clean, to ensure safe distancing, and staff and officials are there to make sure passengers are complying with the rules



MaxDiff – Priorities to encourage to greater bus use (scores show importance relative to each other i.e. a score twice as high than another means the item is twice as important)

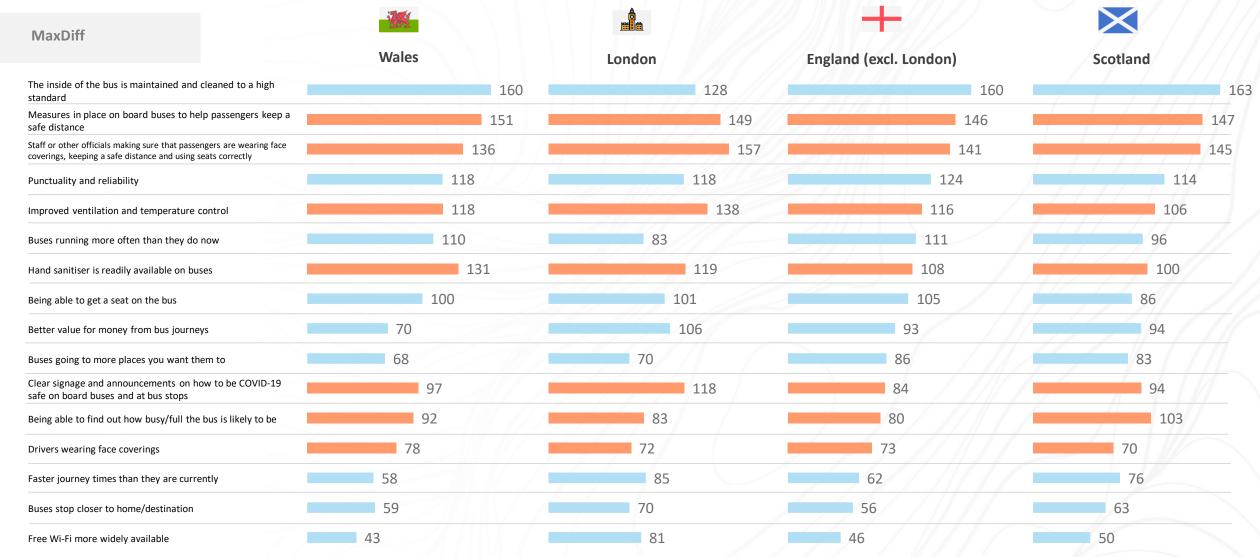
■ COVID related priorities ■ Regular bus priorities

COVID related priorities				Regular bus priorities			
151	131		118	160	110 Buses running more often the	an Being able t	LOO
Measures in place on board buses to help passengers keep a safe distance	Hand sanitiser is readi available on buses		roved ventilation and emperature control	The inside of the bus is maintained and cleaned to a	they do now	th	e bus
				high standard	70	59	58
126	97	0.2			Better value for money from bus journeys	Buses stop closer to	Faster journey times than
136	Clear signage and	92		110		home/ destination	they are currently
Staff or other officials making sure that passengers are wearing	announcements on how to be COVID-19	Being able to fi out how busy/	full	118	68		4.0
face coverings, keeping a safe distance and using seats correctly	safe on board buses and at bus stops	the bus is likely be	y to Drivers wearing face coverings	Punctuality and reliability (buses arriving on time)	Buses going to more places you want them to	Free Wi-Fi more available	. —





And these 3 top priorities are the same in all nations, although in London ventilation and temperature control comes before cleanliness







For current users, although COVID-19 measures are important, ensuring punctuality and reliability of buses is also crucial to ensure higher use



MaxDiff **Current users (reduced) Fully lapsed users** 173 148 The inside of the bus is maintained and cleaned to a high standard 153 140 Measures in place on board buses to help passengers keep a safe distance Staff or other officials making sure that passengers are wearing face coverings, keeping a safe 131 153 distance and using seats correctly 96 160 Punctuality and reliability 128 107 Improved ventilation and temperature control 135 93 Buses running more often than they do now 117 102 Hand sanitiser is readily available on buses 121 91 Being able to get a seat on the bus 101 Better value for money from bus journeys 108 68 Buses going to more places you want them to 87 Clear signage and announcements on how to be COVID-19 safe on board buses and at bus stops 90 73 Being able to find out how busy/full the bus is likely to be 62 Drivers wearing face coverings 73 53 Faster journey times than they are currently 65 Buses stop closer to home/destination 53 40 Free Wi-Fi more widely available





Across the segments, the Cautious Car Choosers are the hardest to encourage to use the bus while it will be easier to influence the use of Spring Back Socialisers and the Anxious and Affected as they have stronger priorities



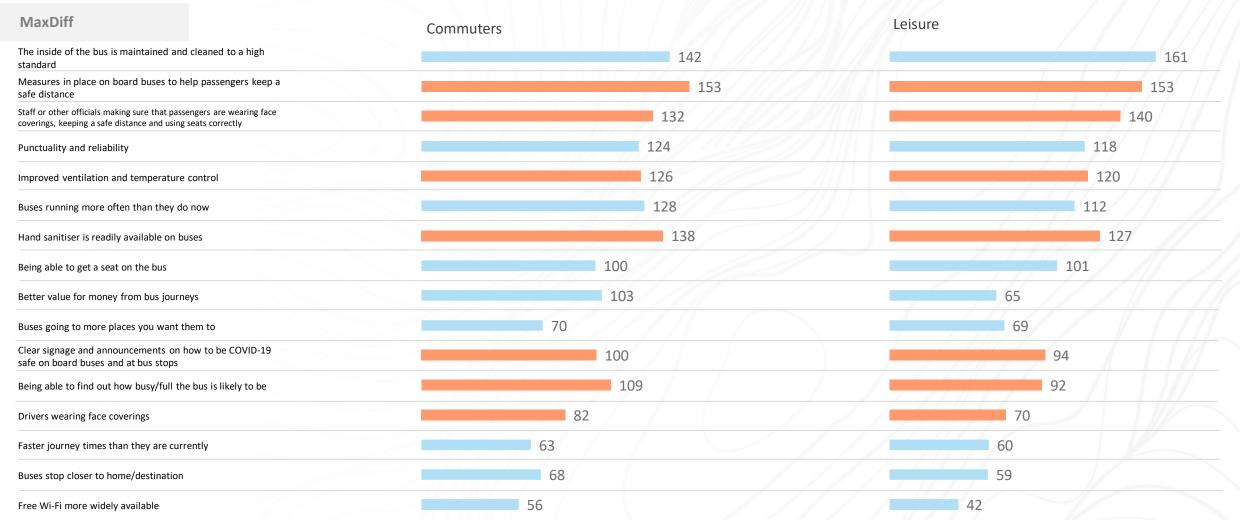
MaxDiff	Wales	Carefree and Carrying on	Cautious Car Choosers	Anxious and Affected	Spring-Back Socialisers	Rethinking Reducers
The inside of the bus is maintained and cleaned to a high standard	160	106	158	170	179	162
Measures in place on board buses to help passengers keep a safe distance	151	70	161	185	158	159
Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly	136	68	139	162	153	121
Punctuality and reliability	118	138	74	153	118	103
Improved ventilation and temperature control	118	87	126	109	131	124
Buses running more often than they do now	110	126	70	133	129	61
Hand sanitiser is readily available on buses	131	116	164	125	117	145
Being able to get a seat on the bus	100	113	86	91	113	89
Better value for money from bus journeys	70	126	60	72	49	69
Buses going to more places you want them to	68	92	41	82	73	43
Clear signage and announcements on how to be COVID-19 safe on board buses and at bus stops	97	73	95	89	104	122
Being able to find out how busy/full the bus is likely to be	92	74	83	124	82	103
Drivers wearing face coverings	78	49	85	74	80	102
Faster journey times than they are currently	58	109	30	56	60	36
Buses stop closer to home/destination	59	100	27	76	49	58
Free Wi-Fi more widely available	43	59	27	32	54	38





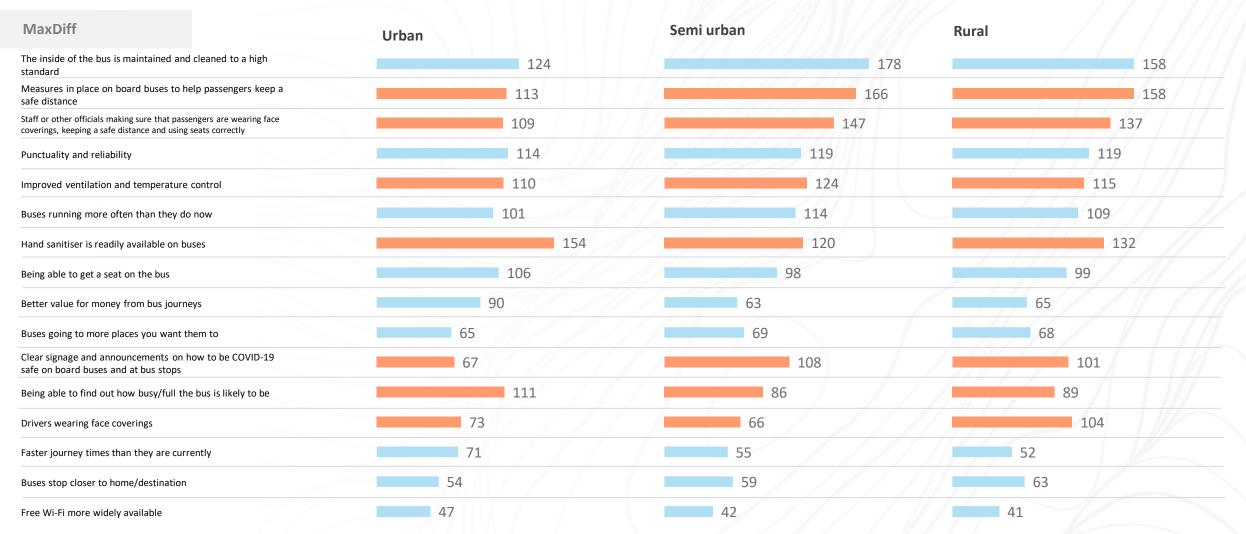
By journey type requirements differ somewhat and need to be responded to accordingly – passengers who make leisure journeys place more importance on cleaning inside the buses while commuters look for measures to keep a safe distance





In rural areas, clear signage and announcements about COVID-19 measures are much more needed compared with urban areas, while in urban areas sanitisers are most important

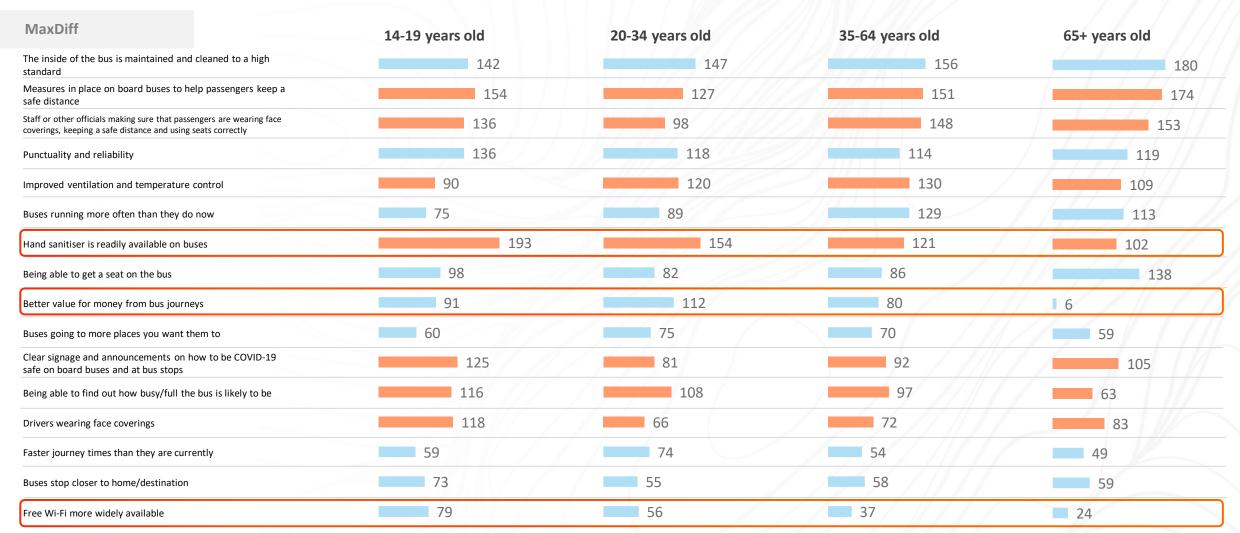






The availability of hand sanitisers is what the younger bus users want to see the most, while value for money is more of a priority for 20-34 year olds







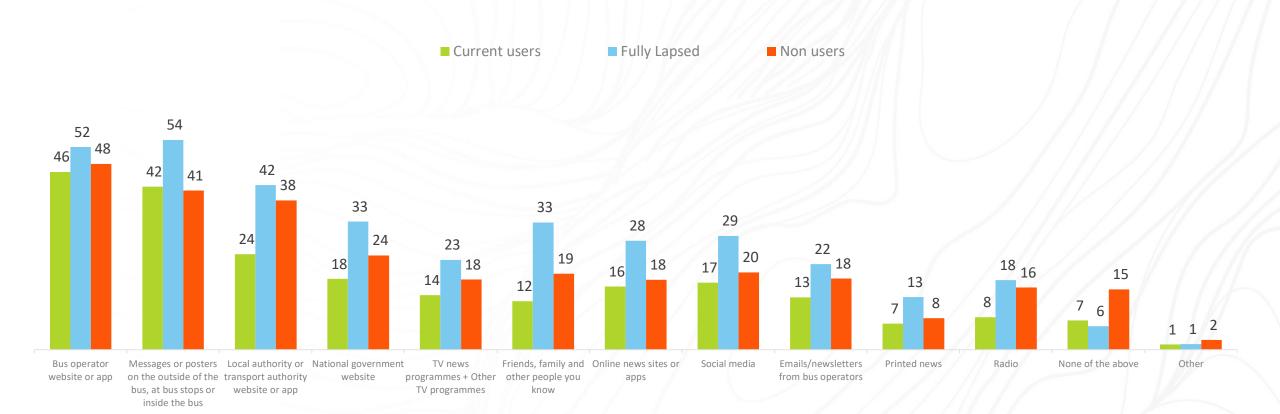




Apps, posters and websites from the bus operators are key media sources for all types of user. Lapsed users also look to more informal sources like family, friends and social media



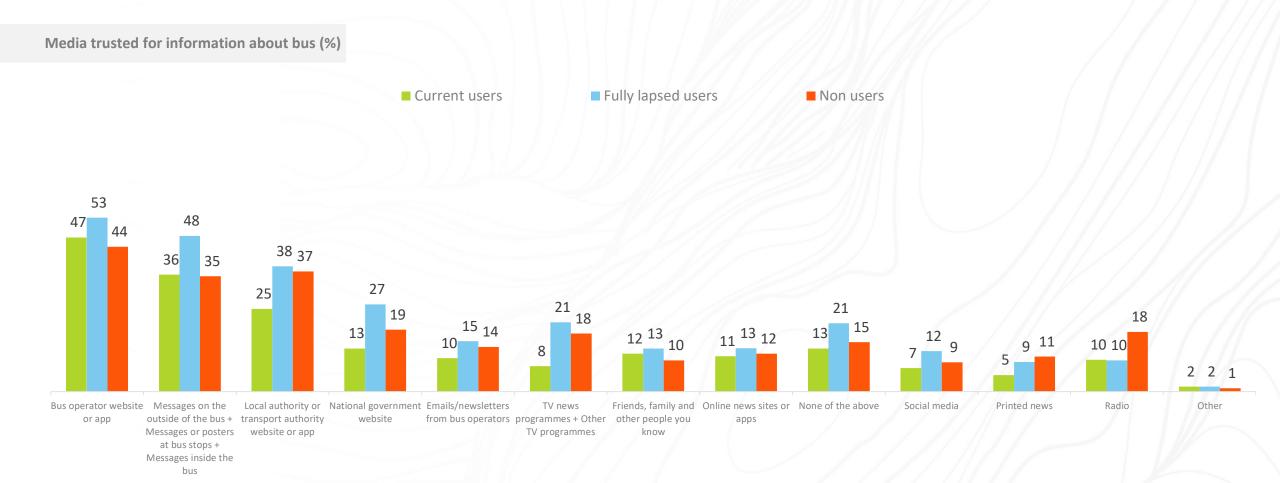
Media used for information about bus (%)





Though non users generally have less trust than lapsed users in these primary forms of media. Interesting to see that lapsed users appear to have greater trust than current users

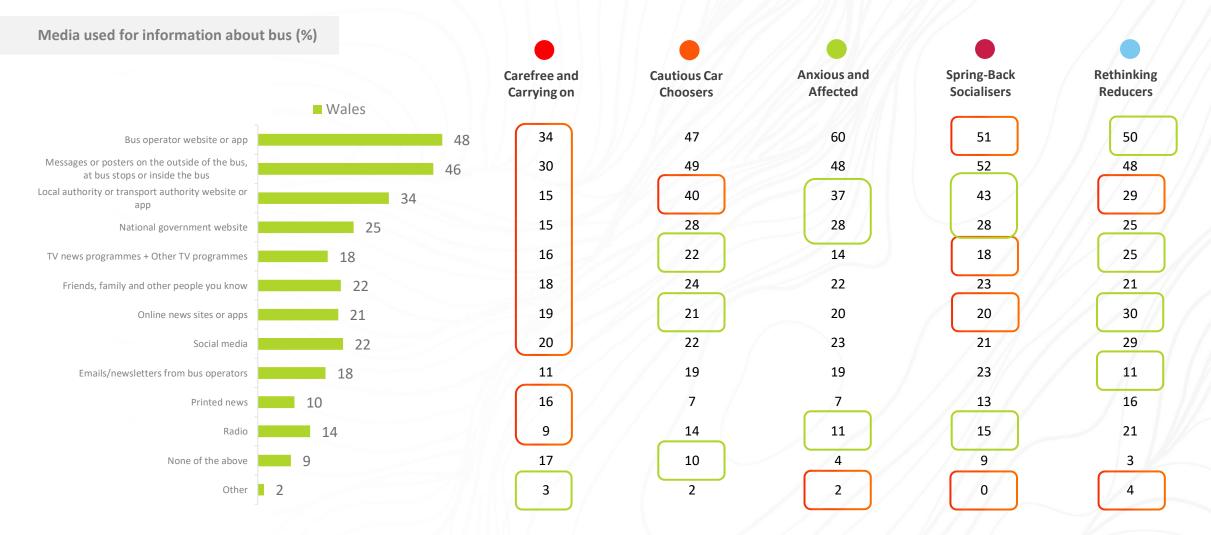






The Cautious Car Choosers, Anxious and Affected and Rethinking Reducer segments are more likely than others to use news programmes on TV or online, as well as government websites



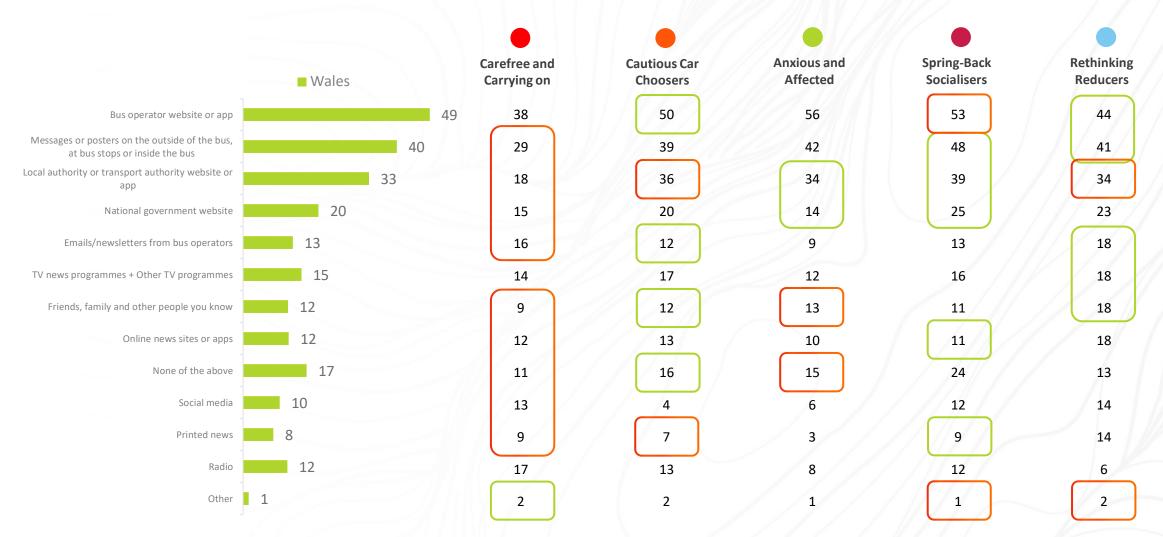






As these media forms are seen as more trustworthy. Saying that, bus operator websites or apps are still viewed as the go-to channels for trusted bus information







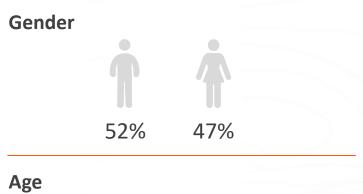




Demographics

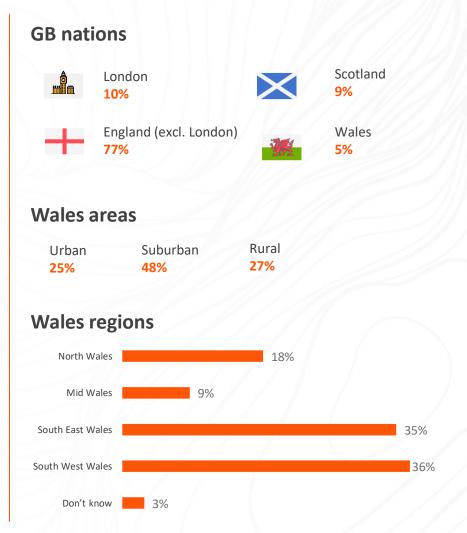
Wales 🌃

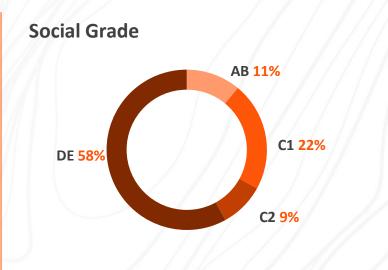
Overall figures

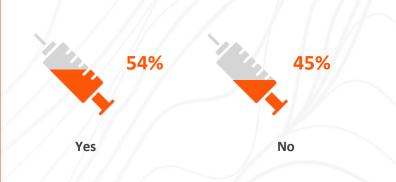




Disability 18% 21% 3% Yes: Vision (e.g. blindness or partial sight) Yes: Hearing (e.g. Yes: Mental health yes: All others deafness or partial hearing)







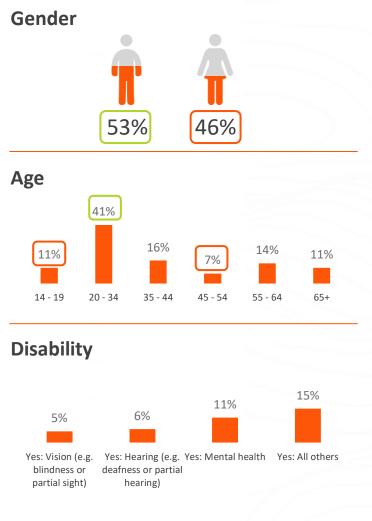
Had the vaccine

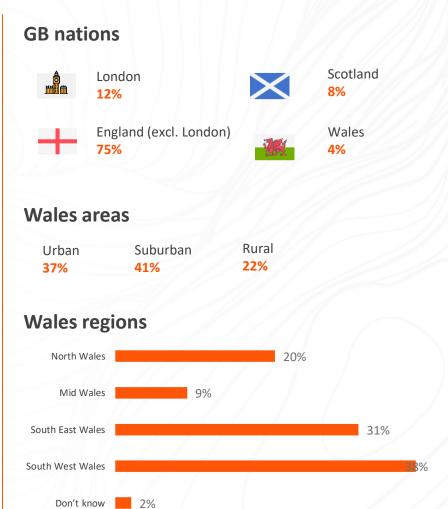


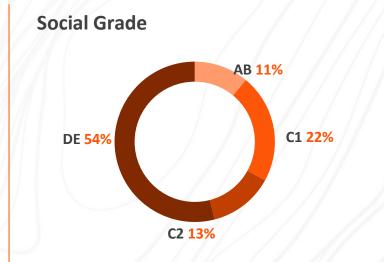
Demographics: Carefree and Carrying on

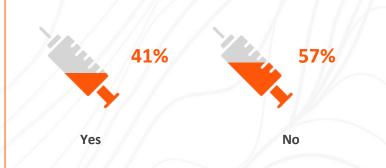


Overall figures









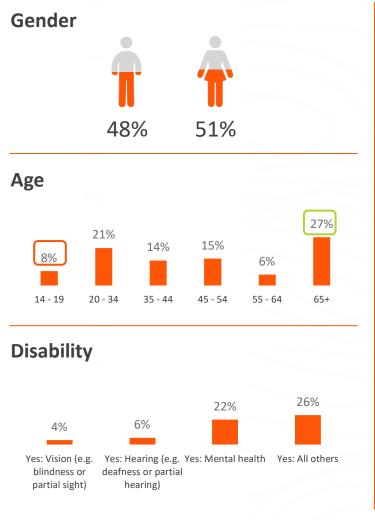
Had the vaccine



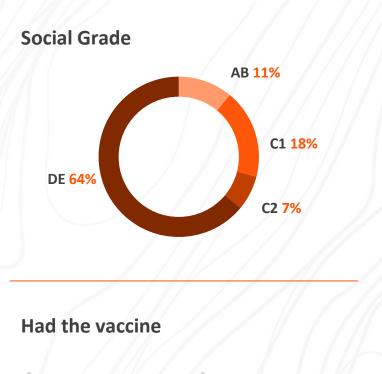
Demographics: Cautious Car Choosers



Overall figures







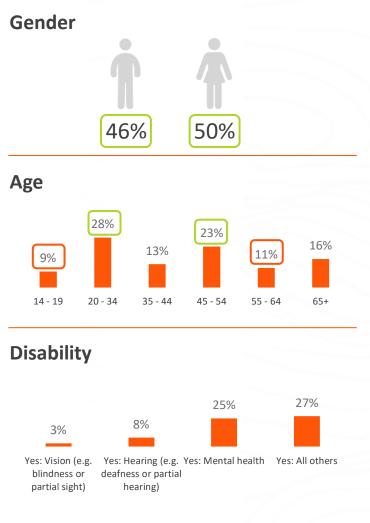




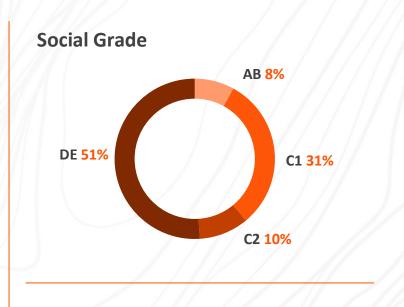
Demographics: Anxious and Affected

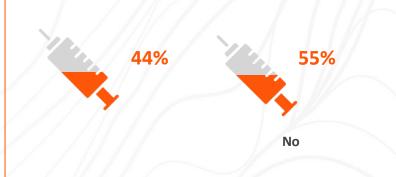


Overall figures









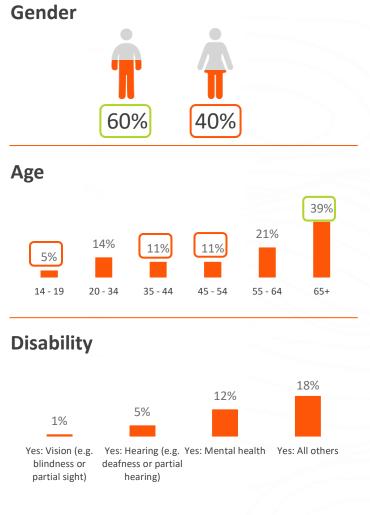
Had the vaccine

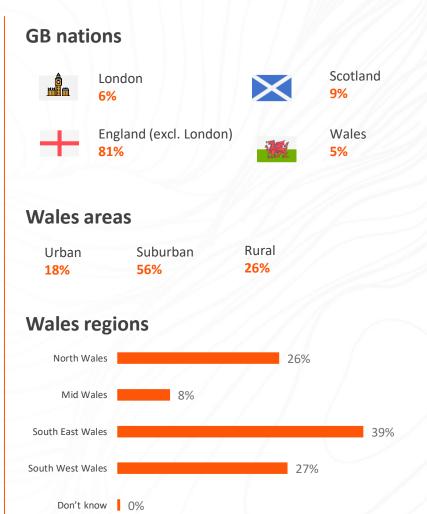


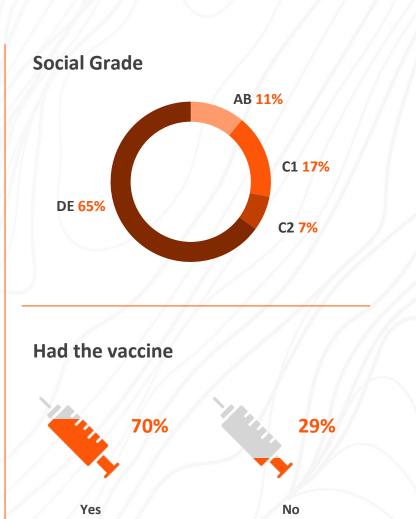
Demographics: Spring-Back Socialisers



Overall figures





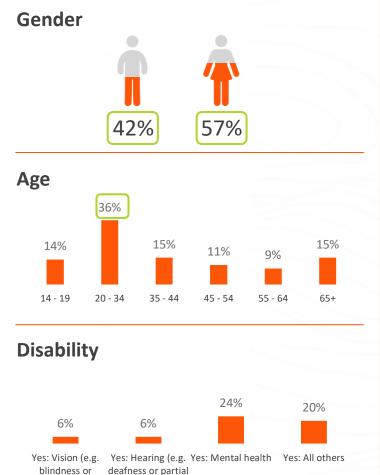


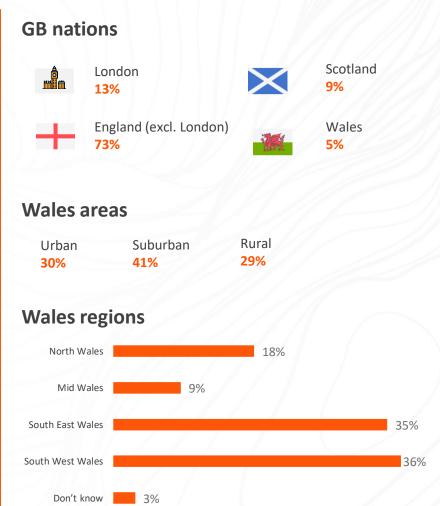


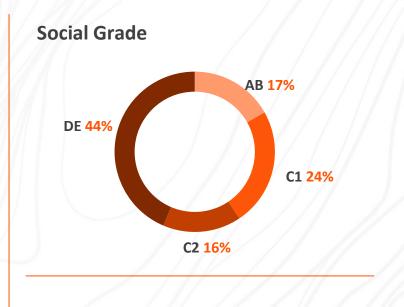
Demographics: Rethinking Reducers

Wales 🌃

Overall figures









Had the vaccine



hearing)

partial sight)



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