

The route ahead - Getting passengers back on buses in Scotland

June 2021

transportfocus 

 **BVA** BDRC

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Background and objectives



Overall objectives

- As a result of the COVID-19 pandemic, limited research was conducted in 2020 to understand bus passengers' views on travelling during and after the COVID-19 pandemic. While Transport Focus gathered the views of some bus passengers through its regular Travel during Covid-19 travel survey, which the industry has found useful, the sample sizes were relatively small. This project aims to bridge the gap in research by providing robust data following a qualitative piece of work Transport Focus carried out in early 2021.
- Specifically, Transport Focus wanted to use this research 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 group

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 was 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 at least once 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 of using buses in future

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 of using buses in future

- Specific sample sizes were achieved for each region:
 - London: n=502
 - England (excluding London): n=7,663
 - Scotland: n=981 (including boost n=500)
 - Wales: n=1,189 (including boost n=700)



These refer to significant differences at 95% confidence level. Green refers to a positive significant difference; orange refers to a negative significant difference



Key summary (1)

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%.

The split of the different travel segments in Scotland is in line with the what is observed in Great Britain with the Spring-Back Socialisers being the largest group across the total of current, lapsed and non-users. 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:

A very large majority (83% vs. 84% in GB) of current users in Scotland felt safe taking the bus during the COVID pandemic. This was less likely to be the case in London where the proportion was 70%.

Most buses in Scotland were quiet with only 16% of passengers experiencing busy buses, which led to most passengers (59%) being able to board their first bus all the time. The experience in London was quite different, with more busy buses and more passengers missing their first bus because it was full. But this capacity factor was also seen in Scotland where a similar, but less magnified, picture emerged in urban areas.

Fewer users were worried or uncomfortable about other passengers' behaviour on the bus (36% vs 43%) or at the bus stop (52% vs 58%) in Scotland compared to the average for GB; but when they were, it was primarily because of the non-compliance with COVID rules and regulations. Enforcement of those rules and regulations is what current users suggested most commonly for improving their journey experience.

Overall satisfaction with bus journeys during the pandemic was high at 82%, one percentage point higher than in Great Britain. There are clear links between overall satisfaction and passengers' experiences with how busy their buses were, how easy it was to catch the first bus and how safe they felt.

Across areas in Scotland, passengers from semi-urban areas were the most satisfied as they were able to enjoy fairly empty buses and felt that bus operators dealt well with COVID-19 safety.

Specific satisfaction metrics highlight that social distancing on buses is also a key element as the highest satisfaction was recorded for the availability of seating (77%) and the lowest satisfaction for being able to find out how busy the bus is likely to be (47%).

Key summary (2)

Scotland



Evolution of bus use

The number of bus users picked up in the summer of 2020 helped by the Spring-Back Socialisers and Anxious and Affected who recorded a higher use in July to September than they did in April-June and October 2020. But overall, in Scotland (and in other parts of GB) bus use has decreased since March 2020 (80% of users have reduced or stopped). These are the least likely to be the Carefree and Carrying on (of which 63% have reduced or stopped).

The Anxious and Affected were the most frequent users in Scotland pre pandemic and are those who have reduced their use the most (by almost 9 trips per month). The Rethinking Reducers followed closely behind with around 7 fewer trips a month.

The COVID related restrictions in place, regulating what people can and cannot do, 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 pre-pandemic levels with nearly all fully lapsed users back on the bus. However, there is predicted to be a move away from the highest frequency of use towards travelling twice a week.

Key summary (3)

Scotland



Opportunities

Despite the COVID pandemic, some users (6%) have increased their bus use and, by the end of the pandemic, 17% of passengers in Scotland are planning on increasing their bus use. This will be primarily for leisure journeys.

While the most frequent users pre pandemic are planning on decreasing their use post COVID, others are planning on slightly increasing their frequency of using the bus.

Threats

Similar to Great Britain, in Scotland 36% 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 and the Cautious Car Choosers.

Of all passengers (current users and lapsed), 4 in 5 used the bus less often, more so from rural areas, and from the Cautious Car Choosers, Anxious and Affected and Rethinking Reducers. These segments are more likely to have used another mode of transport instead of the bus. 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.



Ways to increase usage

Understanding the experience of **those who have reduced their bus use during Covid or not used the bus at all**, is crucial to finding solutions to mitigate the threats:

- Provision of information is one key element, as many do not know which measures are in place to address COVID-19 risks.
- The ability to find out how busy the bus is likely to be (or if it is full) is what passengers were the least satisfied with and is something that could be addressed.
- There were more COVID-19 related reasons for feeling worried about other passengers' behaviours at the bus stop and on the bus **for those who have reduced their bus use** relating to:
 - keeping a safe distance
 - face coverings
 - not being considerate when getting on or off the bus

For **fully lapsed users** concerns surrounding COVID-19 are a big reason for not travelling at the moment, but summer sees a slight rise in the number who would feel more relaxed to travel. For **non-users**, other modes of transport are more convenient. This being said, they are looking more likely to travel on a bus post-pandemic, while current users and fully lapsed will reduce their usage.

For these two groups (**fully lapsed and non-users**) it's important to provide information around what is being done on 3 key areas, as there is a disconnect between what they want and what they think is currently in place:

- Hand sanitizer on board
- Additional services to avoid crowding
- Improved ventilation

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

They also point out the need for punctuality and reliability to encourage them to use the bus more often.

Summary Findings – Carefree and Carrying on



Current users – **57%**



Currently travelling more often – **8%** About the same – **21%** Less often – **28%**

Fully Lapsed users – **26%**

Non-users – **18%**

Focusing on England (excl. London):

- **81%** of all current users are satisfied with their bus journeys since March 2020 and **90%** felt they were generally safe during their journeys.
- Despite this, they were less satisfied with experiences on the bus compared to the other segments; as such 69% felt there was enough availability of seating or space to stand versus 81% for the rest of England (excl. London)

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 – 24%;
2. Following Government guidelines – 19%;
3. I am able to work from home – 15%

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

1. No bus related reasons (None of the above) – 31%;
2. Travelling by another mode of transport is more convenient – 23%;
3. Poor frequency of bus – 15%

40% have a car or motorbike available to them and **46%** 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 –
125

Buses running more often than they do now –
117

The inside of the bus is maintained and cleaned to a high standard –
109

Being able to get a seat on the bus –
104

Summary Findings – Cautious Car Choosers



Current users – **31%**



Currently travelling more often – **8%** About the same – **5%** Less often – **17%**

Fully Lapsed users – **45%**

Non-users – **24%**

Focusing on England (excl. London):

- **78%** of all current users are satisfied with their bus journeys since March 2020 and **81%** felt they were generally safe during their journeys.
- They were more satisfied with experiences on the bus compared to the other segments; as such 56% felt they were able to find out how busy/full the bus is likely to be versus 42% for the rest of England (excl. London).

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 – 53%;
2. Concerned about other passengers not following COVID-19 measures – 47% - **Both of which are significantly higher than the overall England (Excl. London);**
3. Following government guidelines – 34%

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

1. Travelling by another mode of transport is more convenient – 35%;
2. No bus related reasons (None of the above) – 23%;
3. Too crowded/difficult to get a seat – 19%

60% have a car or motorbike available to them and **61%** 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:

The inside of the bus is maintained and cleaned to a high standard – **139**

Measures in place on board buses to help passengers keep a safe distance – **131**

Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly – **121**

Summary Findings – Anxious and Affected



Current users – 53%

Fully Lapsed users – 38%

Non-users – 9%

↓
Currently travelling more often – 6% About the same – 10% Less often – 38%

Focusing on England (excl. London):

- **71%** of all current users are satisfied with their bus journeys since March 2020 and **74%** felt they were generally safe during their journeys.
- They were significantly less satisfied with experiences on the bus compared to the other segments for all except the payment options available. The lowest satisfaction was for being able to find out how busy/full the bus is likely to be – 30%.

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 – 50%;
3. Following government guidelines – 45%

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

1. No bus related reasons (None of the above) – 36%;
2. Travelling by another mode is more convenient – 23%;
3. Poor frequency of bus – 21%

31% have a car or motorbike available to them and **62%** 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 – **171**

Measures in place on board buses to help passengers keep a safe distance – **171**

Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly – **170**

Summary Findings – Spring-Back Socialisers



Current users – **54%**



Currently travelling more often – **3%** About the same – **12%** Less often – **39%**

Fully Lapsed users – **34%**

Non-users – **12%**

Focusing on England (excl. London):

- **94%** of all current users are satisfied with their bus journeys since March 2020 and **95%** 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 availability of seating or space to stand – **93%**.

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. Following government guidelines – **46%**;
2. Concerned about catching COVID-19 – **42%**;
3. Because there are fewer leisure occasions – **42%**

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

1. No bus related reasons (None of the above) – **41%**;
2. Travelling by another mode is more convenient – **21%**;
3. Another reason – **15%**

58% have a car or motorbike available to them and **56%** 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 – **199**

Measures in place on board buses to help passengers keep a safe distance – **172**

Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly – **164**

Summary Findings – Rethinking Reducers



Current users – **42%**



Currently travelling more often – **8%** About the same – **7%** Less often – **27%**

Fully Lapsed users – **42%**

Non-users – **16%**

Focusing on England (excl. London):

- **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 but were more likely to have issues with punctuality and being able to keep safe distance on the bus and while getting on and off.

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 – 47%;
2. Concerned about other passengers not following COVID-19 measures – 37%;
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 – 27%;
2. No bus related reasons (None of the above) – 19%;
3. Poor frequency of bus – 19%

45% have a car or motorbike available to them and **63%** 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:

Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly – **140**

Measures in place on board buses to help passengers keep a safe distance – **135**

The inside of the bus is maintained and cleaned to a high standard – **134**

Hand sanitiser is readily available on buses – **130**

Bus use during COVID-19

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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, while Scotland matched the GB average



49% Current Users 

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

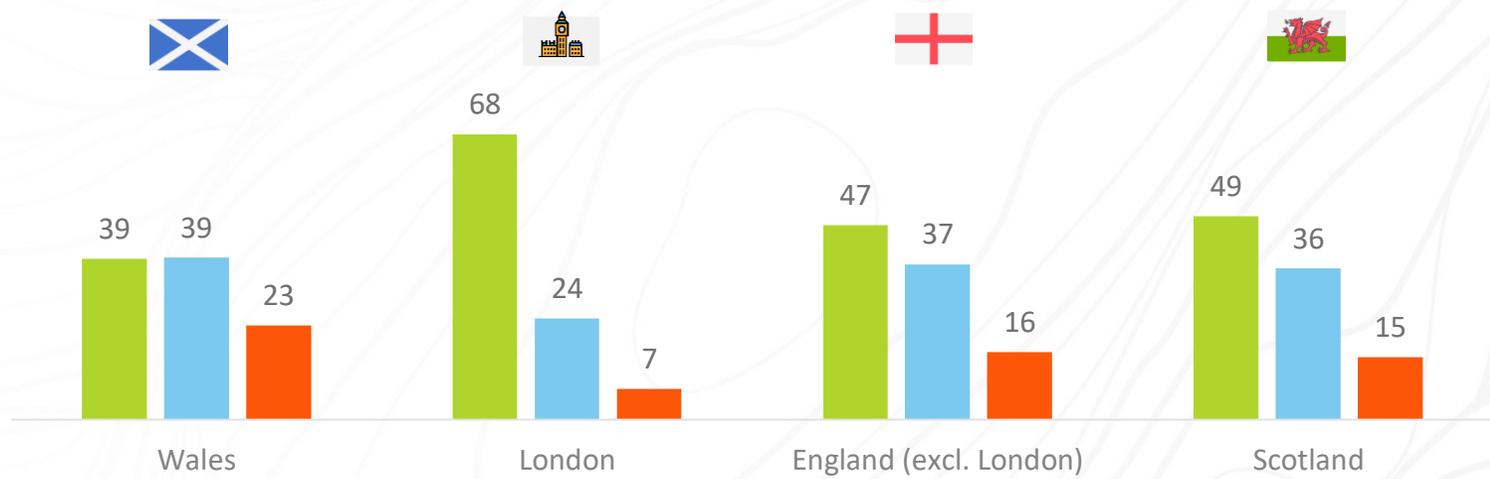
36% Fully lapsed Users 

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

15% Non User 

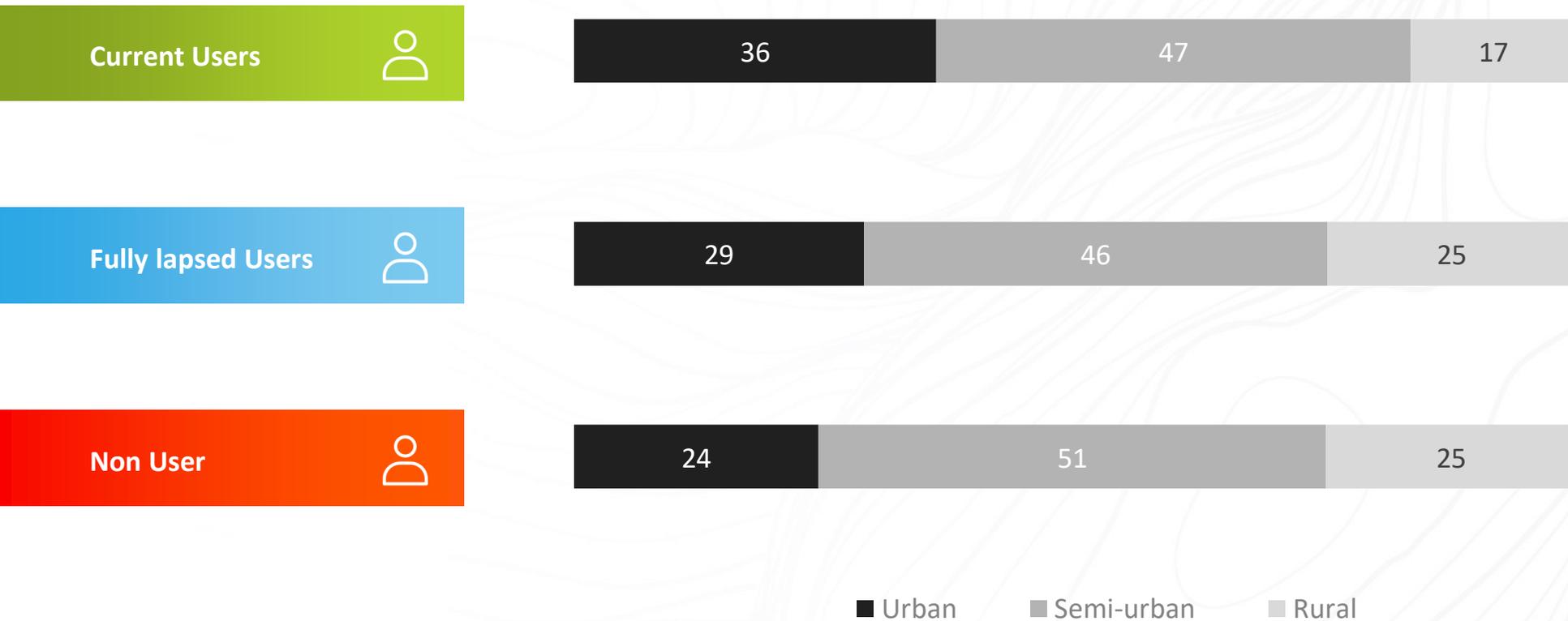
Any respondent who used the bus less than once every 3 months or not at all before the pandemic, and not since, and is not a bus rejecter

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



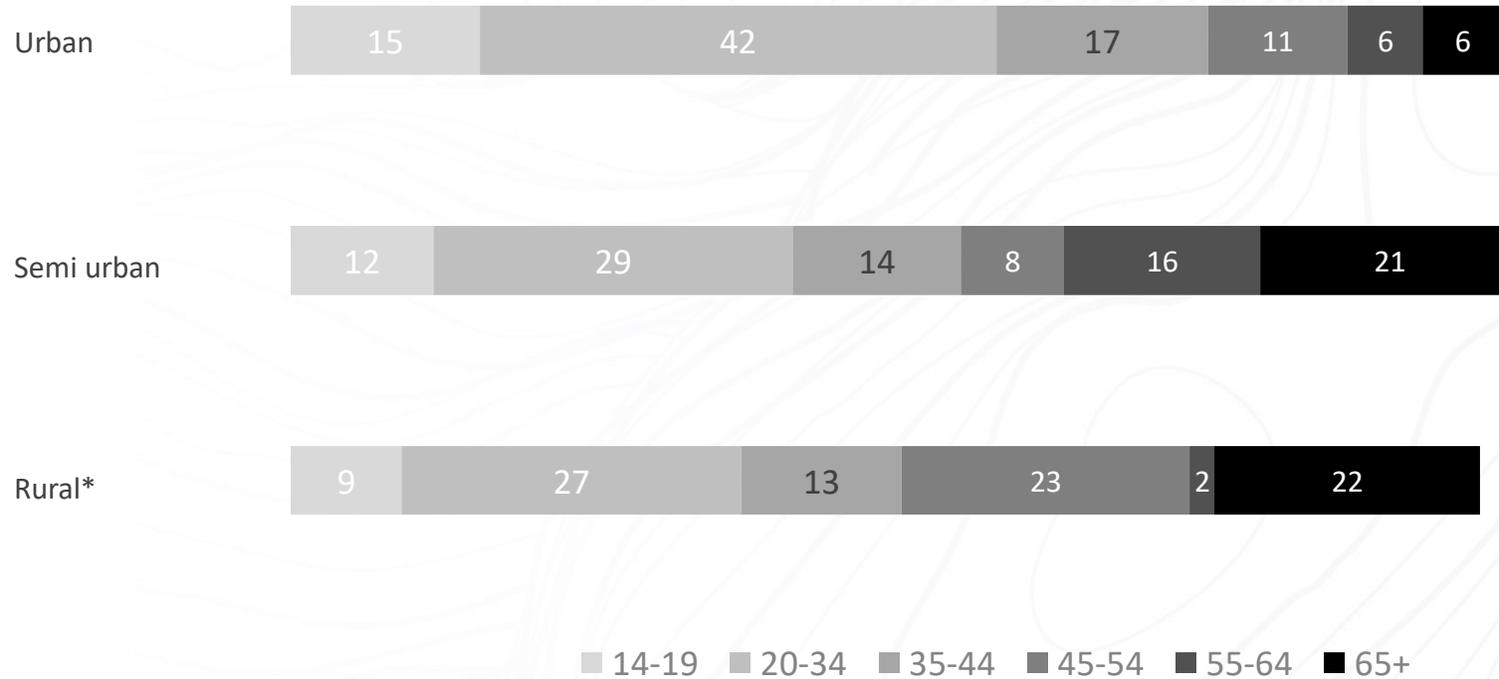
Current users are the least likely to be from rural areas in Scotland...

Scotland 



...and those that are, tend to be older than those in urban areas

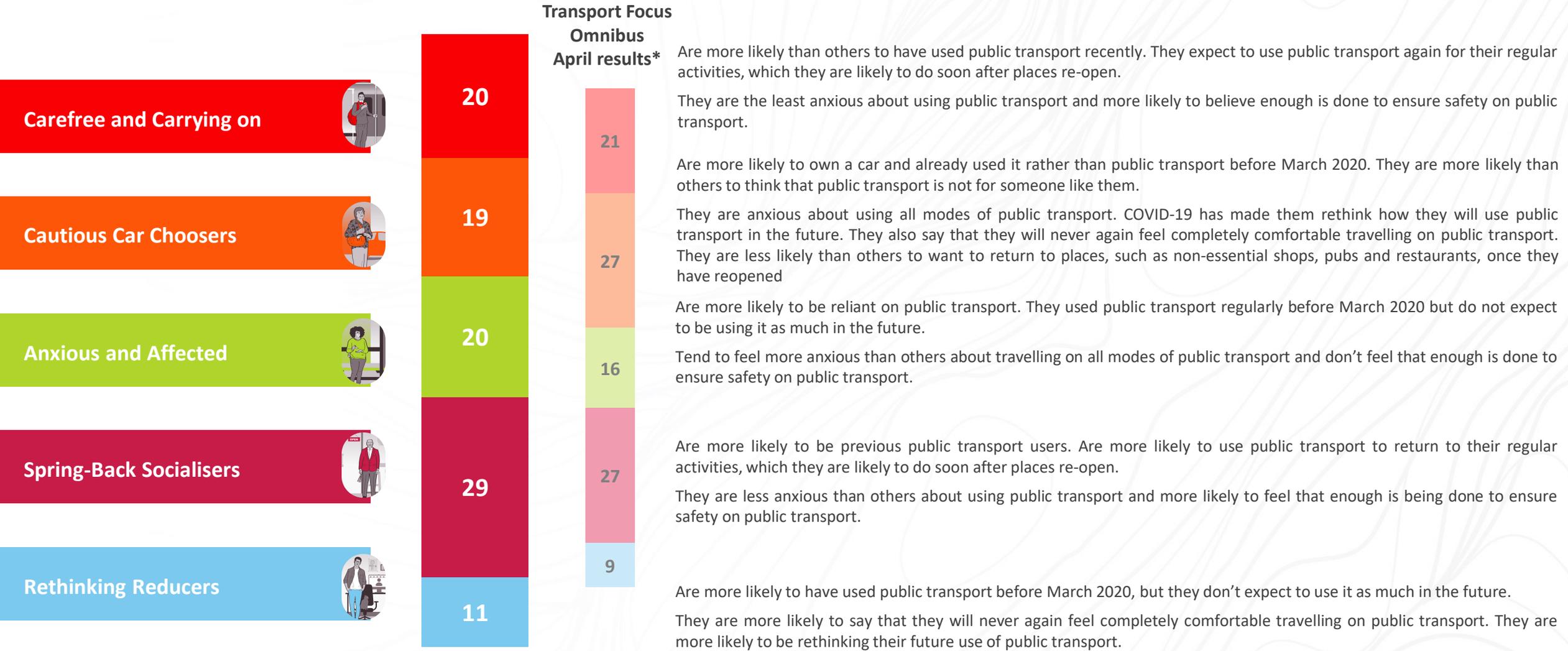
Current Users



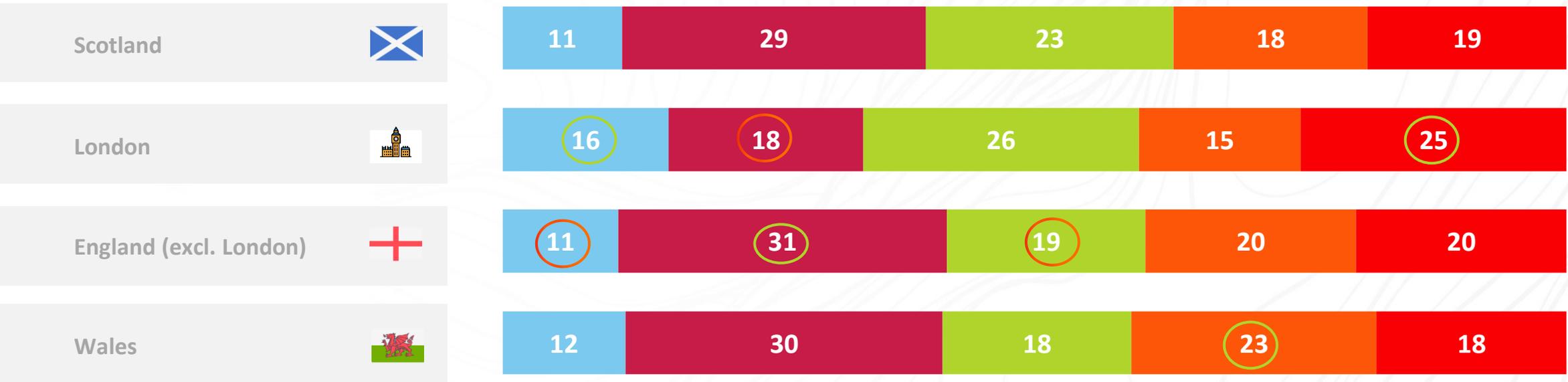
* Cautious – low base size

S5: And is this...? Urban n=145, Semi urban n=161, Rural n=54

Meet the Transport Focus travel segments



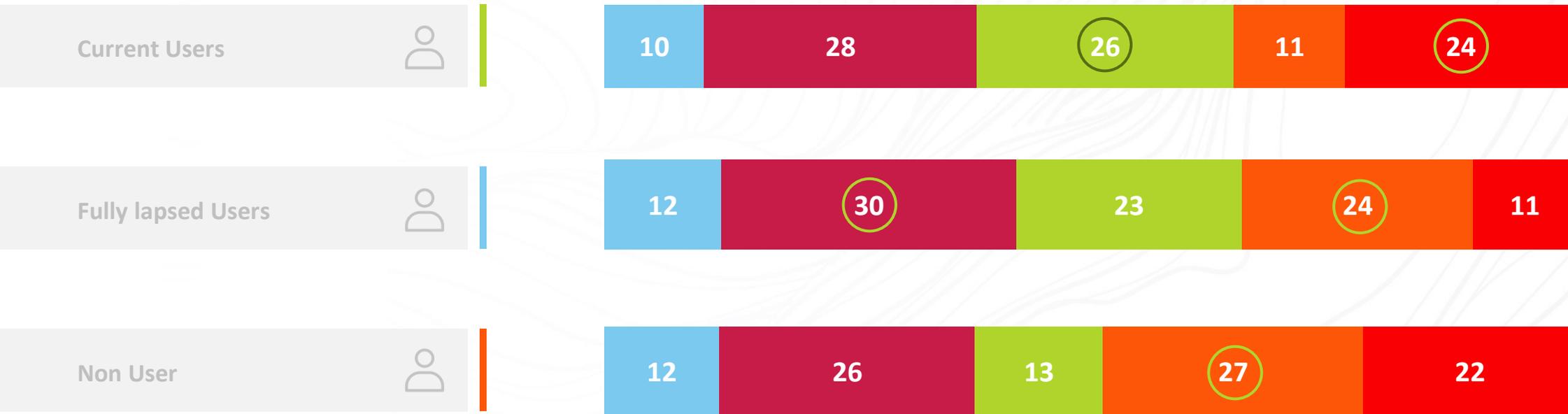
Because of its urban younger demographic, London records the highest proportion of Carefree and Carrying on. Wales, which recorded the lowest bus use since COVID-19 started, had a significantly higher proportion of Cautious Car Choosers



● Rethinking Reducers
 ● Spring-Back Socialisers
 ● Anxious and Affected
 ● Cautious Car Choosers
 ● Carefree and Carrying on

While current users are less likely to be Cautious Car Choosers, this segment is more prevalent in the fully lapsed and non-user groups

Scotland



● Rethinking Reducers
 ● Spring-Back Socialisers
 ● Anxious and Affected
 ● Cautious Car Choosers
 ● Carefree and Carrying on

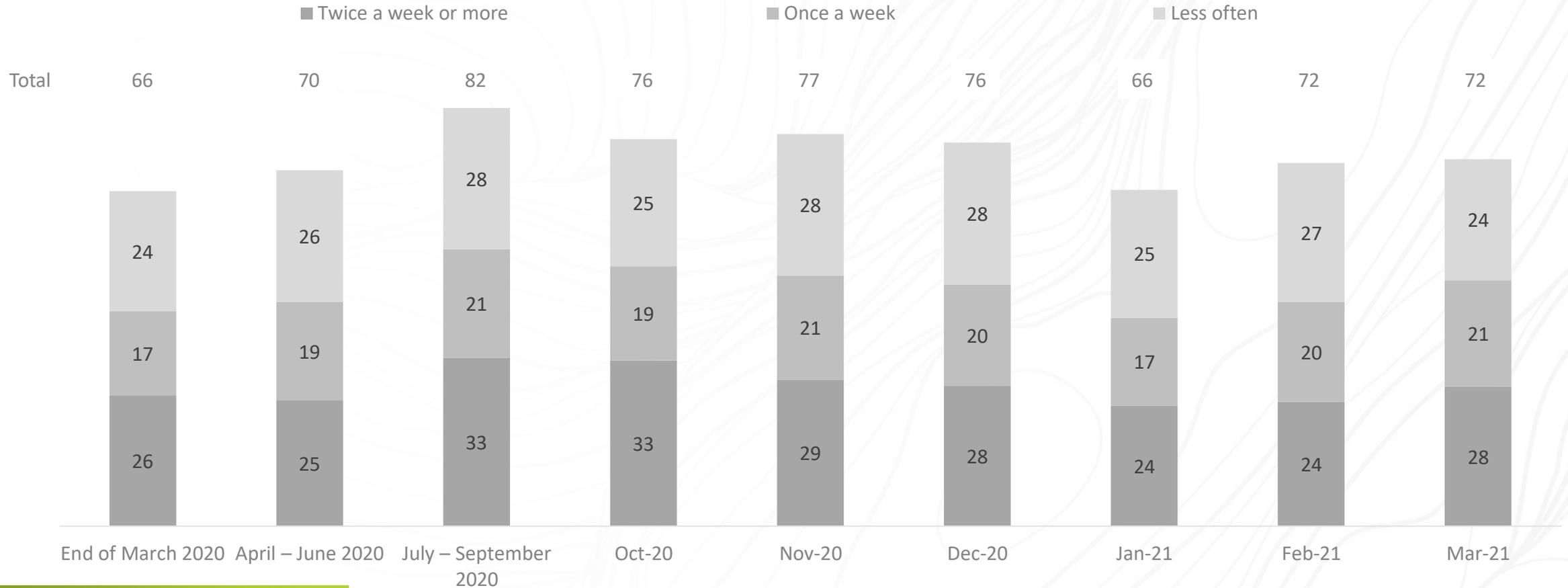


Reviewing experience of bus use during COVID-19

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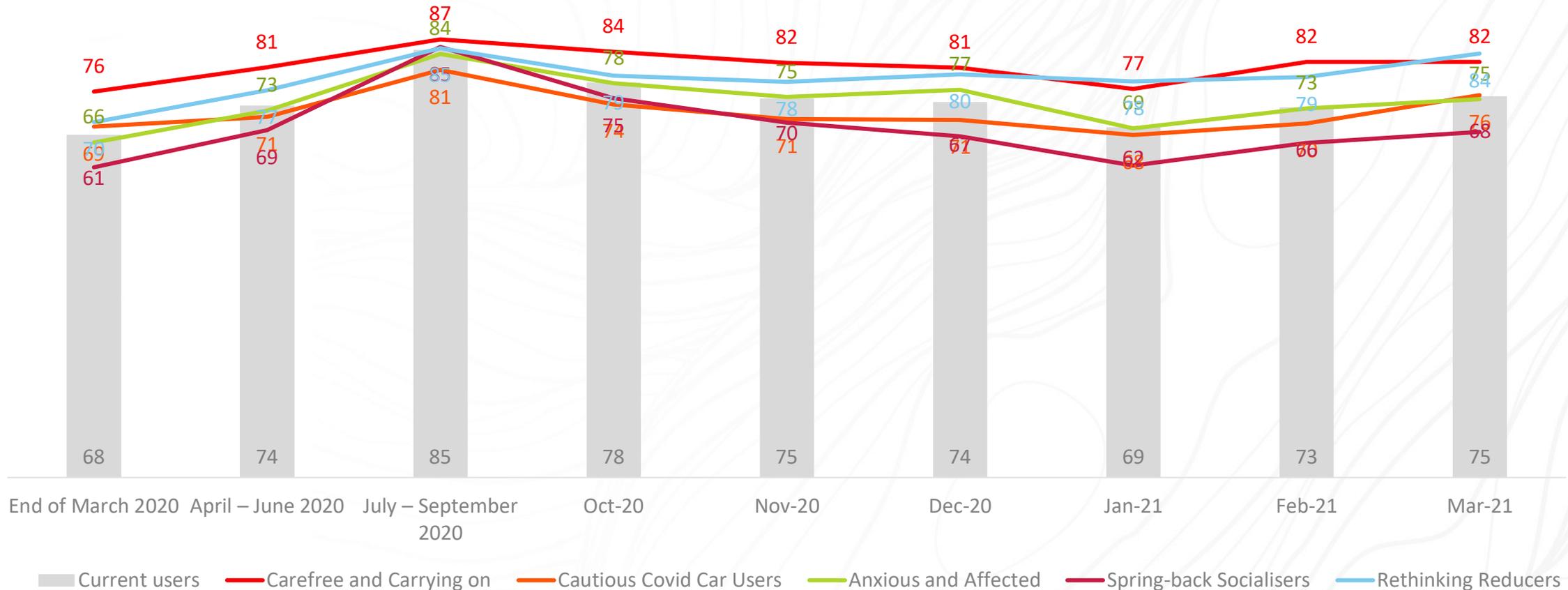
Bus use in Scotland picked up during the summer of 2020 with 82% of those who have used buses in the past year travelling during July to September



Current Users

Q2_2. When did you travel by bus and how frequently within that time period?, Base = 360

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



Current Users

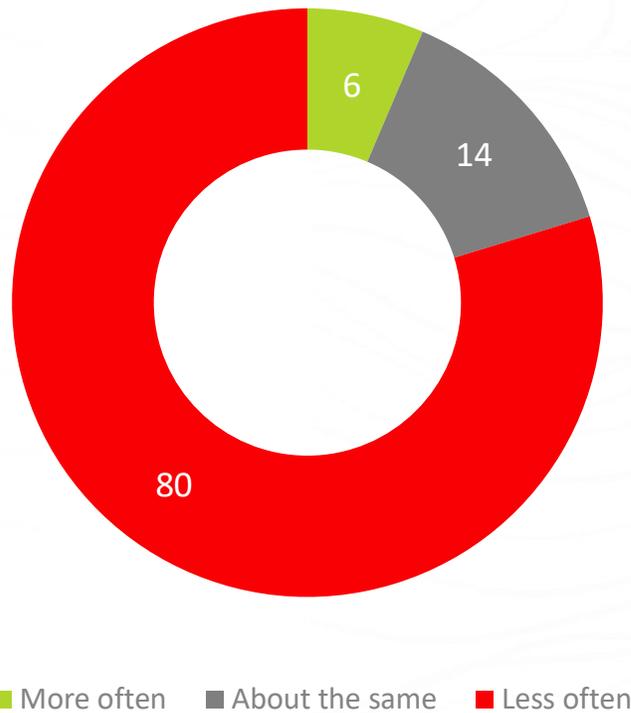
Q2_2. When did you travel by bus and how frequently within that time period?, Base = 5,547, Carefree and Carrying on n= 982, Cautious Car Choosers n= 501, Anxious and Affected n= 775, Spring-Back Socialisers n= 1,114, Rethinking Reducers n=385

But overall, the majority of passengers have decreased their frequency of bus use compared to before the COVID-19 crisis. Rethinking Reducers and rural passengers are the groups most likely to have used the bus less often

Scotland



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



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

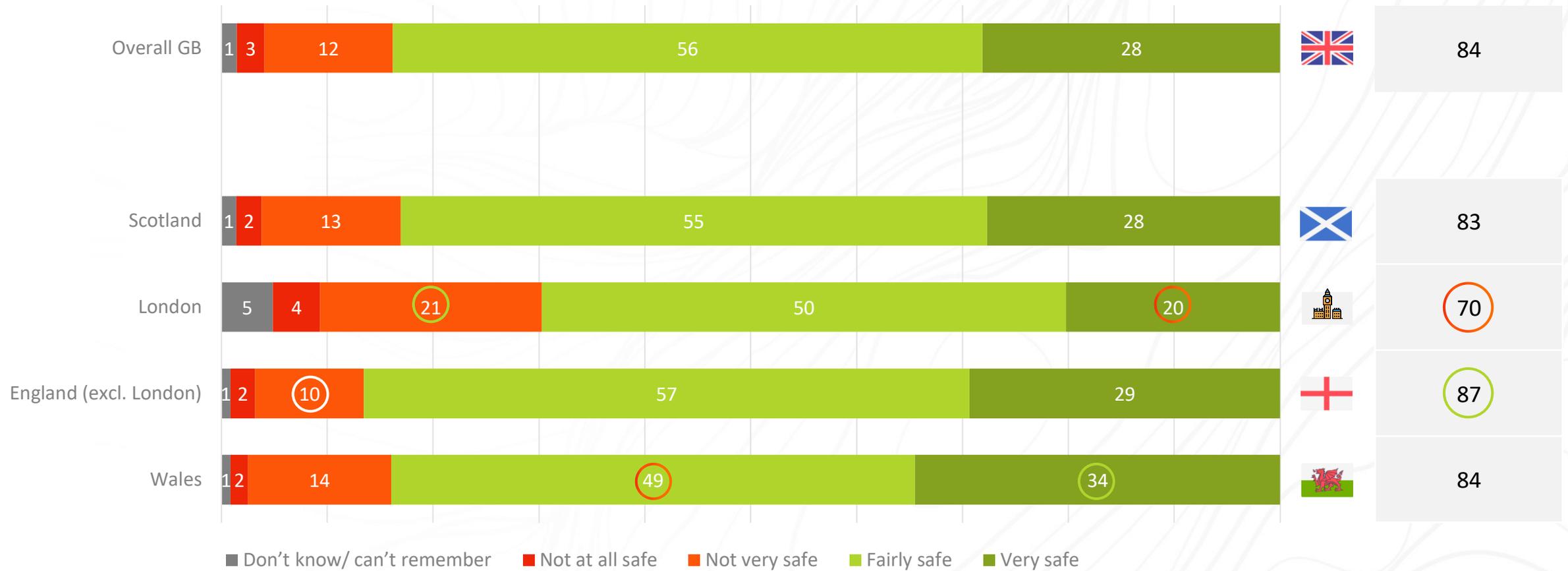


Most passengers who used the bus during the pandemic felt safe. London is the area where passengers felt the least safe with only 1 in 5 feeling very safe



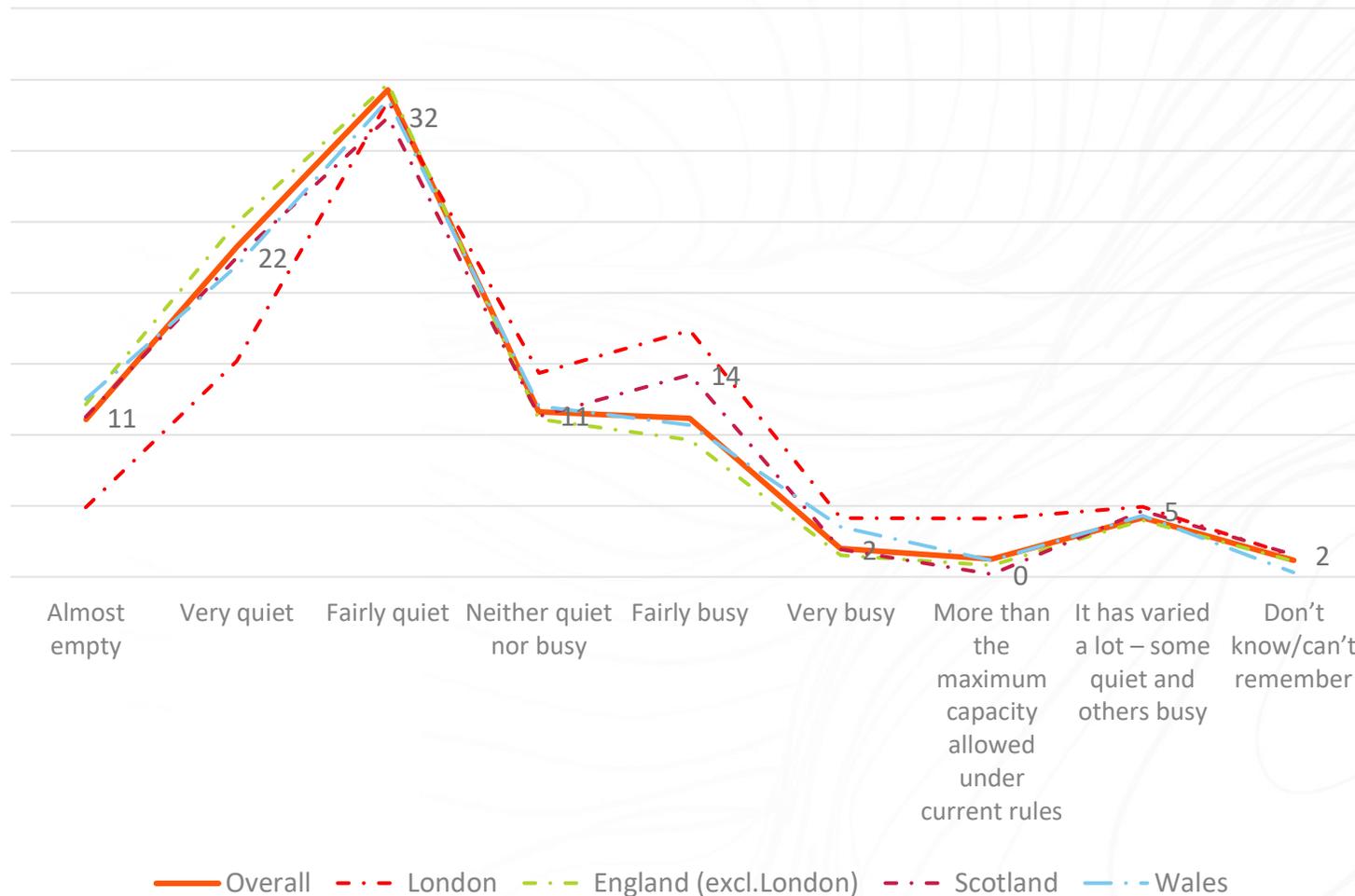
How safe passenger felt (%)

NET Safe (%)

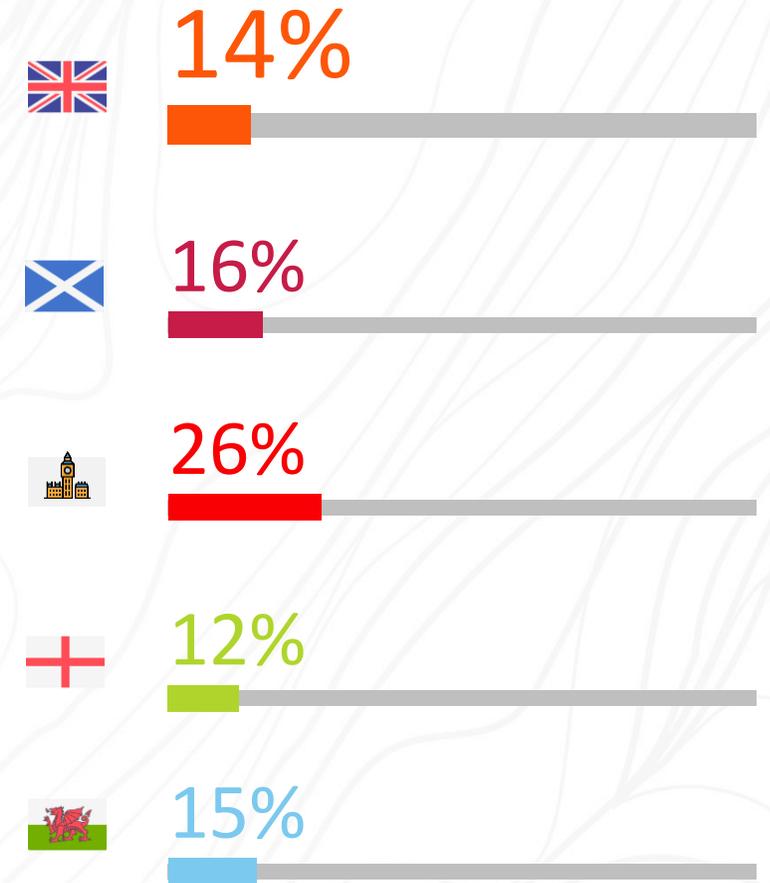


Passengers' feeling of safety is closely related with how many other passengers were on the bus, and in Scotland, 1 in 6 passengers travelled on busy buses

How busy were the buses when making journey (%)



Any busy (fairly to maximum capacity)

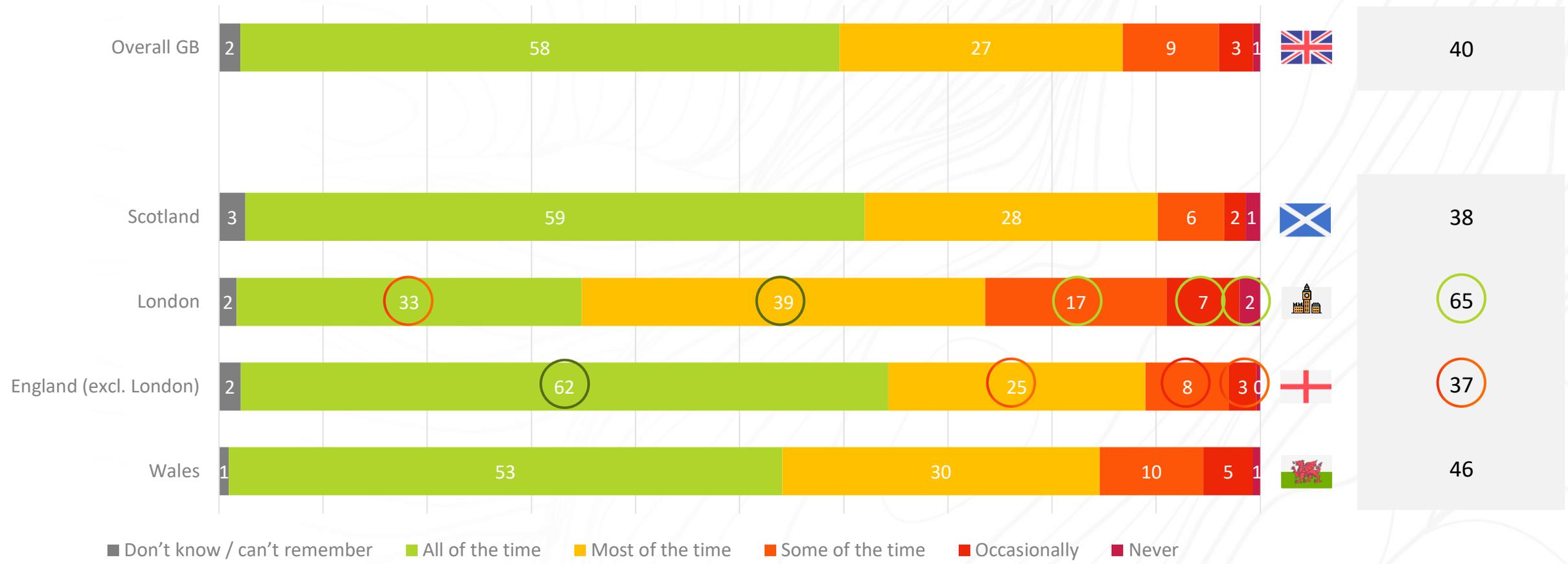


Overall, just under 3 in 5 never had an issue with missing their bus because of capacity, with Scotland having a similar share to GB of those who caught it all or most of the time



Able to catch the first bus (%)

NET Were not able to catch the first bus all the time (%)



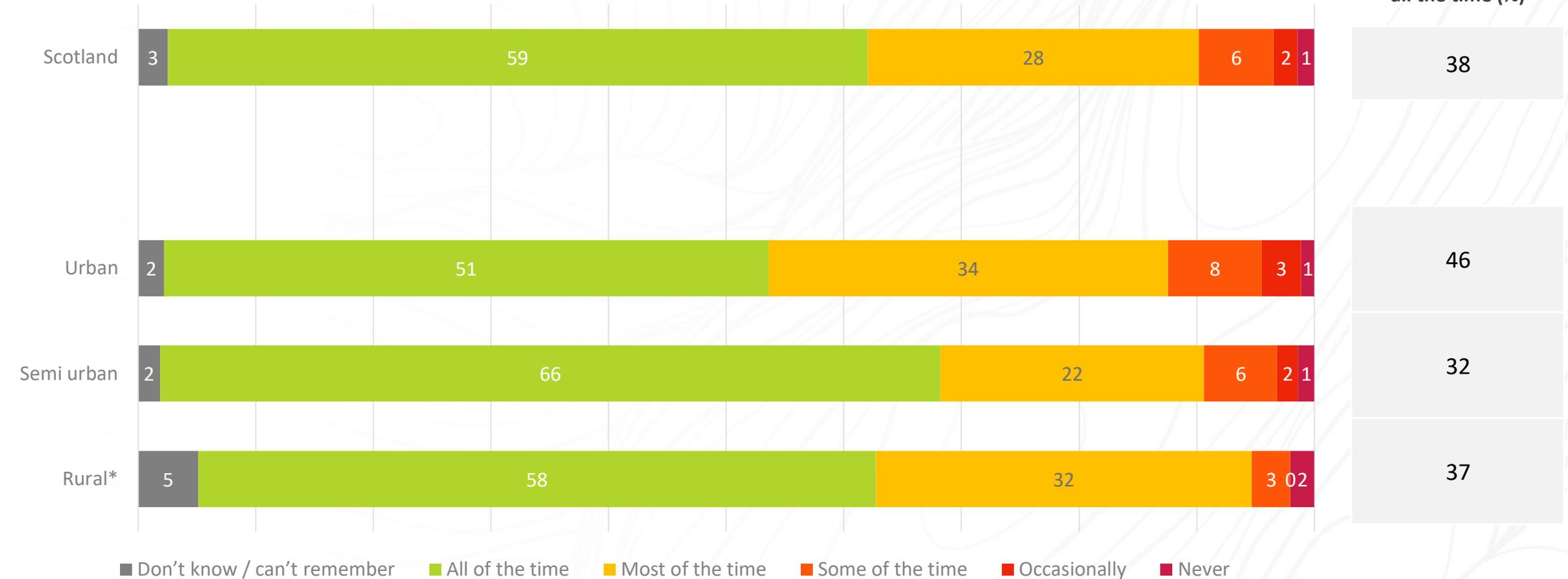
Q2_10: Still thinking about your overall experience of taking the bus since March 2020, how often were you able to board the first bus for the route you were catching that arrived at your stop (that there was space on board) Current users =5,547, London n=180, England (except London) n=4,498, Scotland n=360, Wales n=509

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

Scotland



Able to catch the first bus (%)



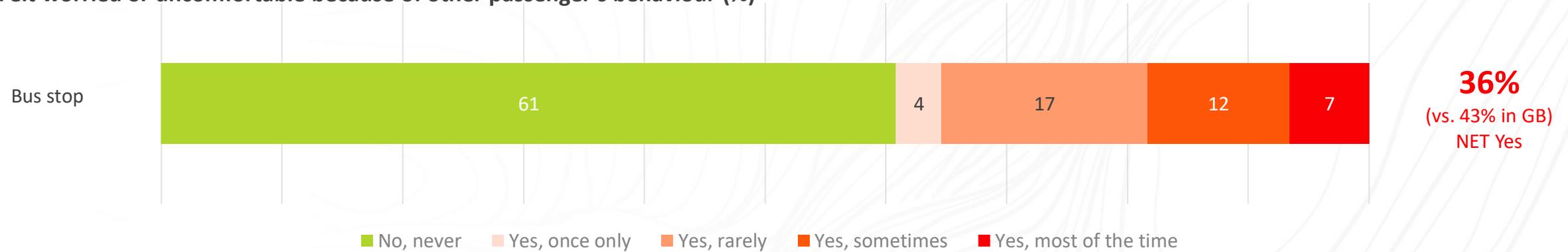
* Cautious – low base size

Q2_10: Still thinking about your overall experience of taking the bus since March 2020, how often were you able to board the first bus for the route you were catching that arrived at your stop (that there was space on board) Current users Scotland = 360, Urban n=140, Suburban n=161, Rural n=54

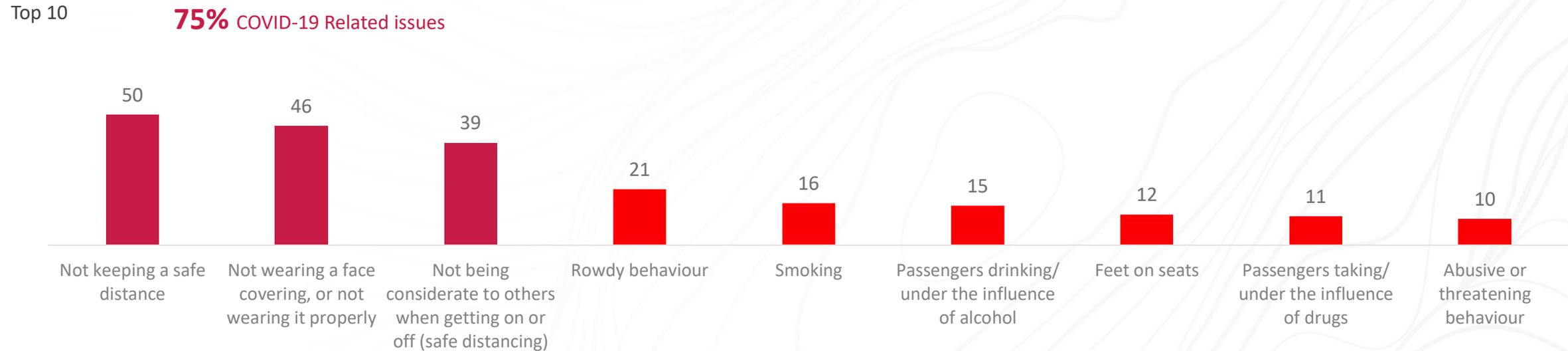
In Scotland, over a third felt worried or uncomfortable at the bus stop and this was mainly because of other passengers not complying with COVID-19 rules and regulations



Felt worried or uncomfortable because of other passenger's behaviour (%)



Reasons for feeling worried/uncomfortable (%)

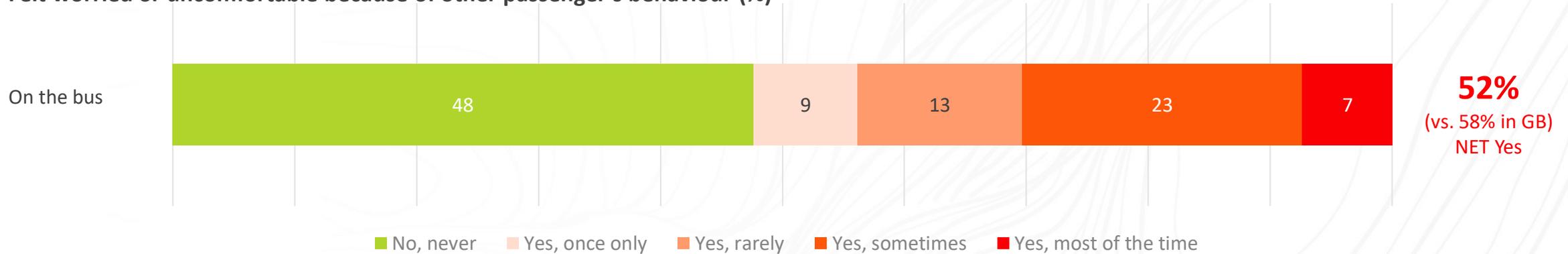


On board the bus in Scotland around half of passengers felt uneasy, with 85% of those concerned attributing it to COVID-19 related behaviour

Scotland



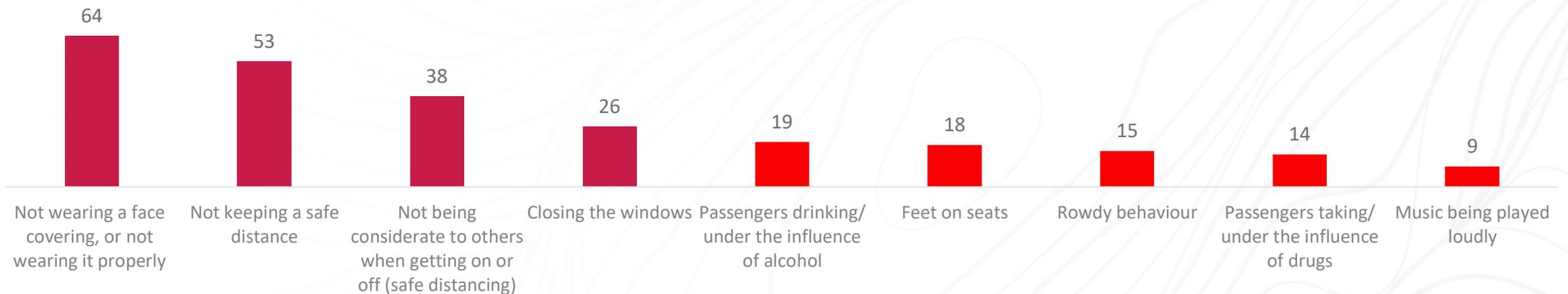
Felt worried or uncomfortable because of other passenger's behaviour (%)



Reasons for feeling worried/uncomfortable (%)

Top 10

85% COVID-19 Related issues



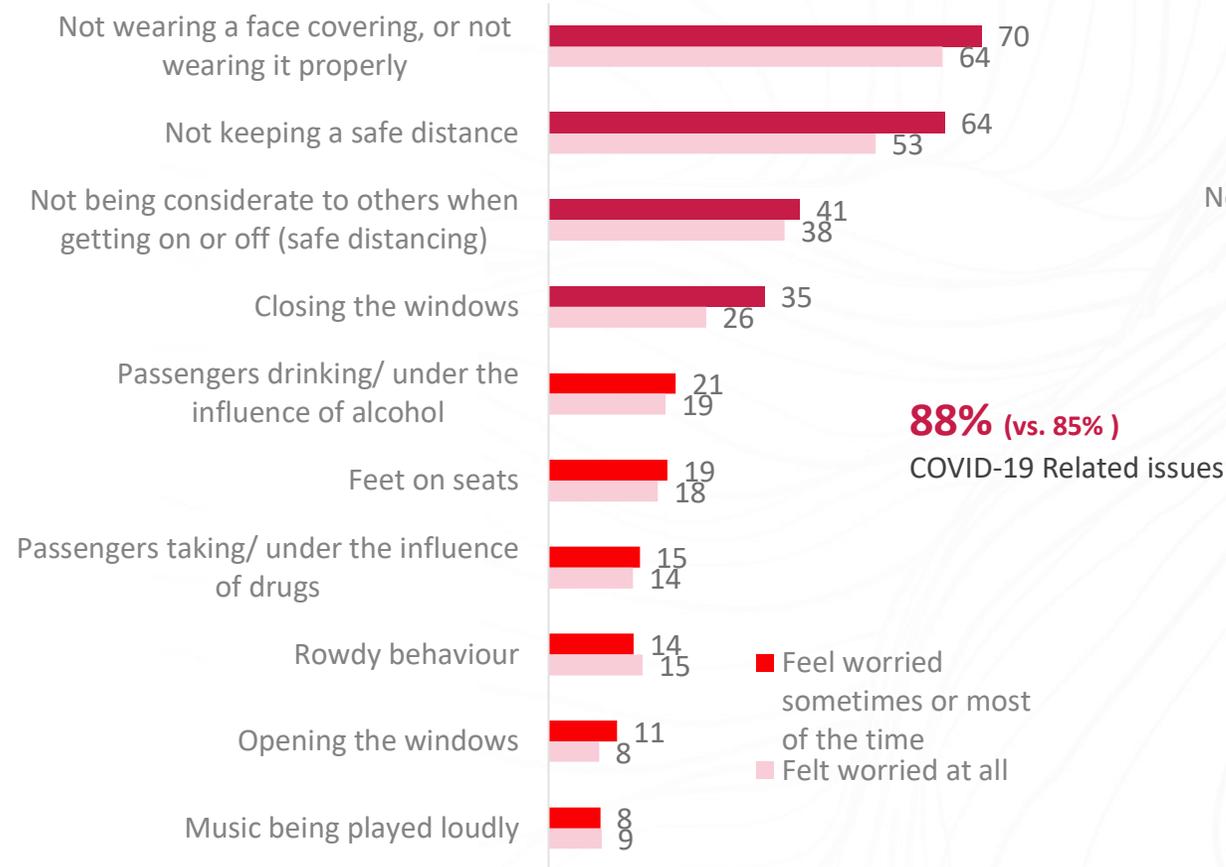
For those who felt worried sometimes or most of the time the same COVID-19 issues are pointed out implying that these are recurring issues

Scotland

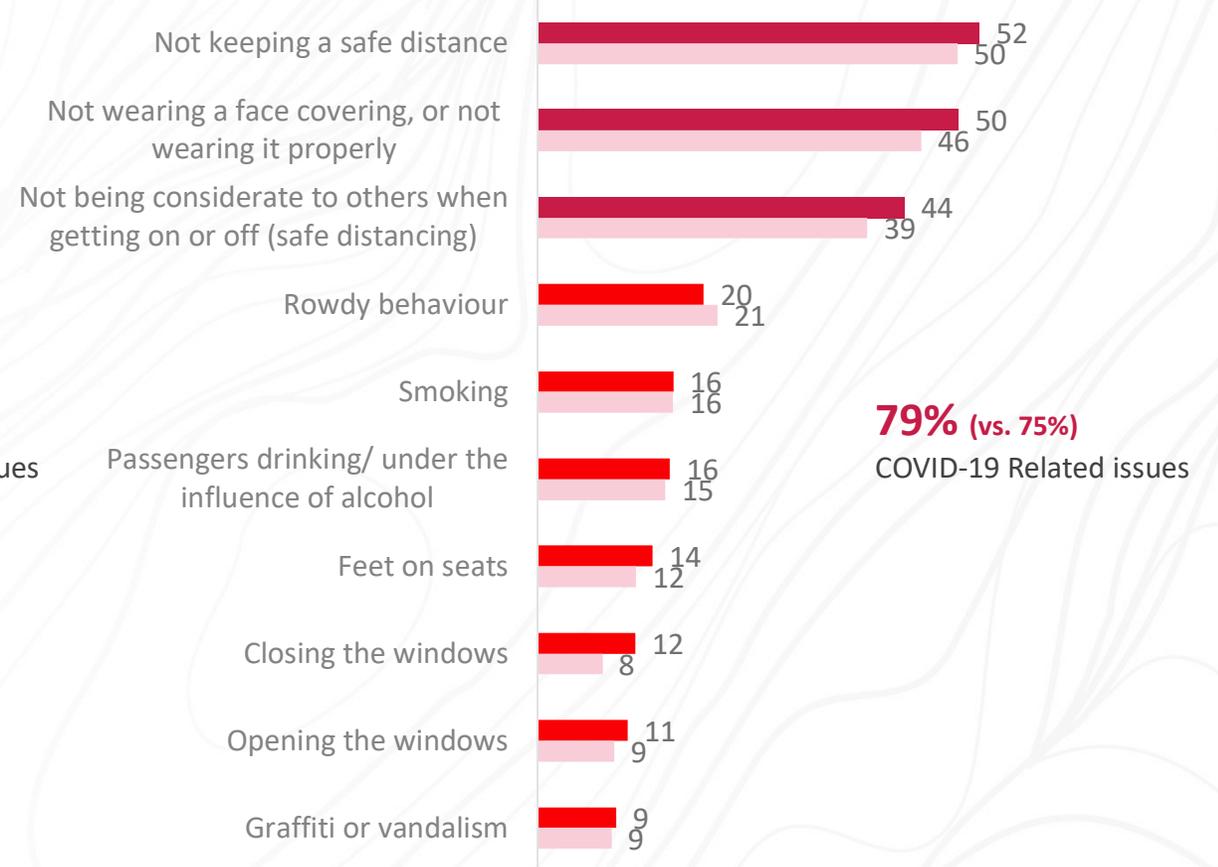


Top 10

On the bus



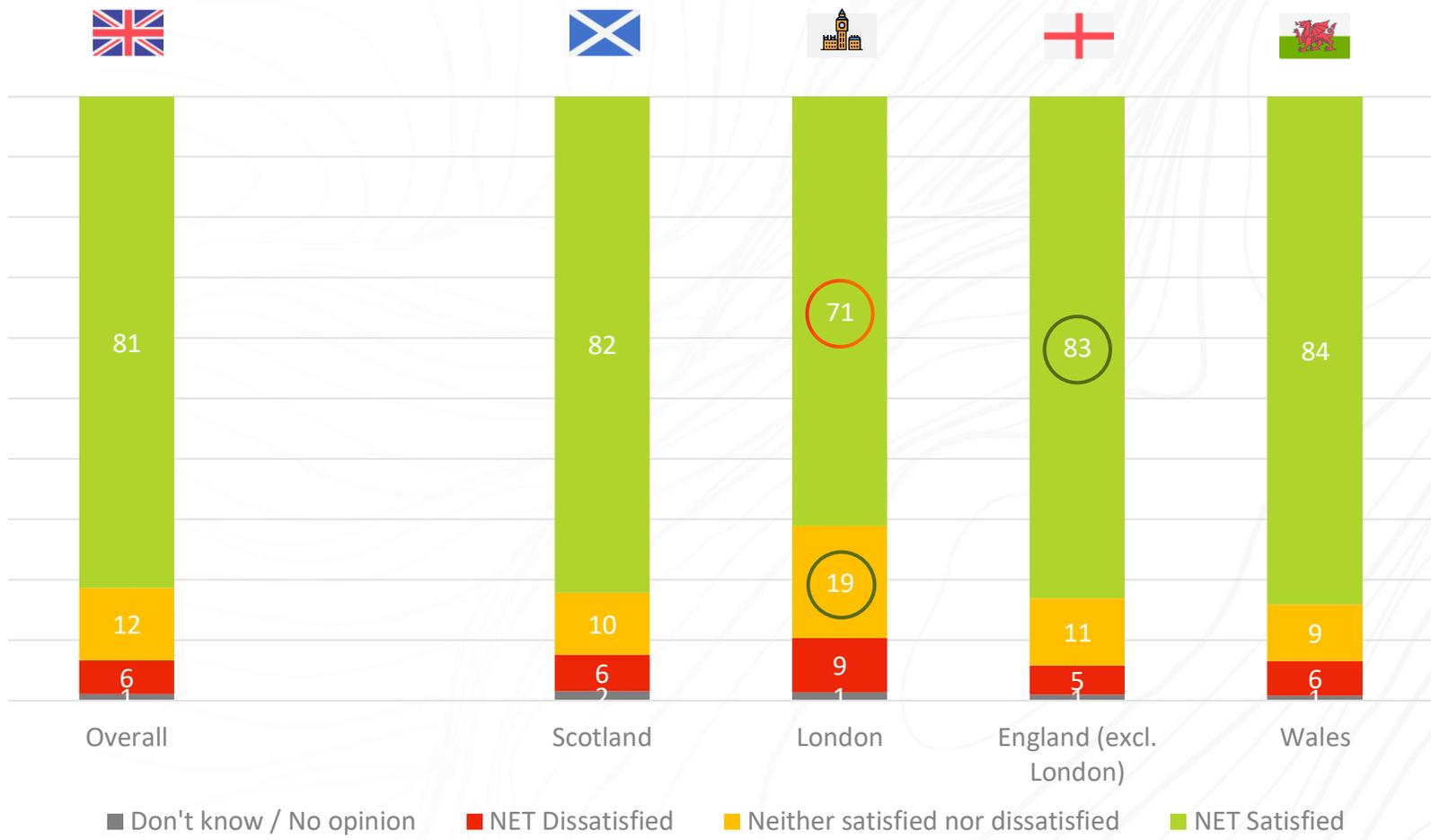
At the bus stop



Overall satisfaction with the bus journey(s) during the pandemic is high. Scotland scores 82% which is slightly lower than the 91% recorded in the last BPS. London records the lowest satisfaction but 71% of users are still satisfied.



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



BPS Autumn 2019:
Overall satisfaction:

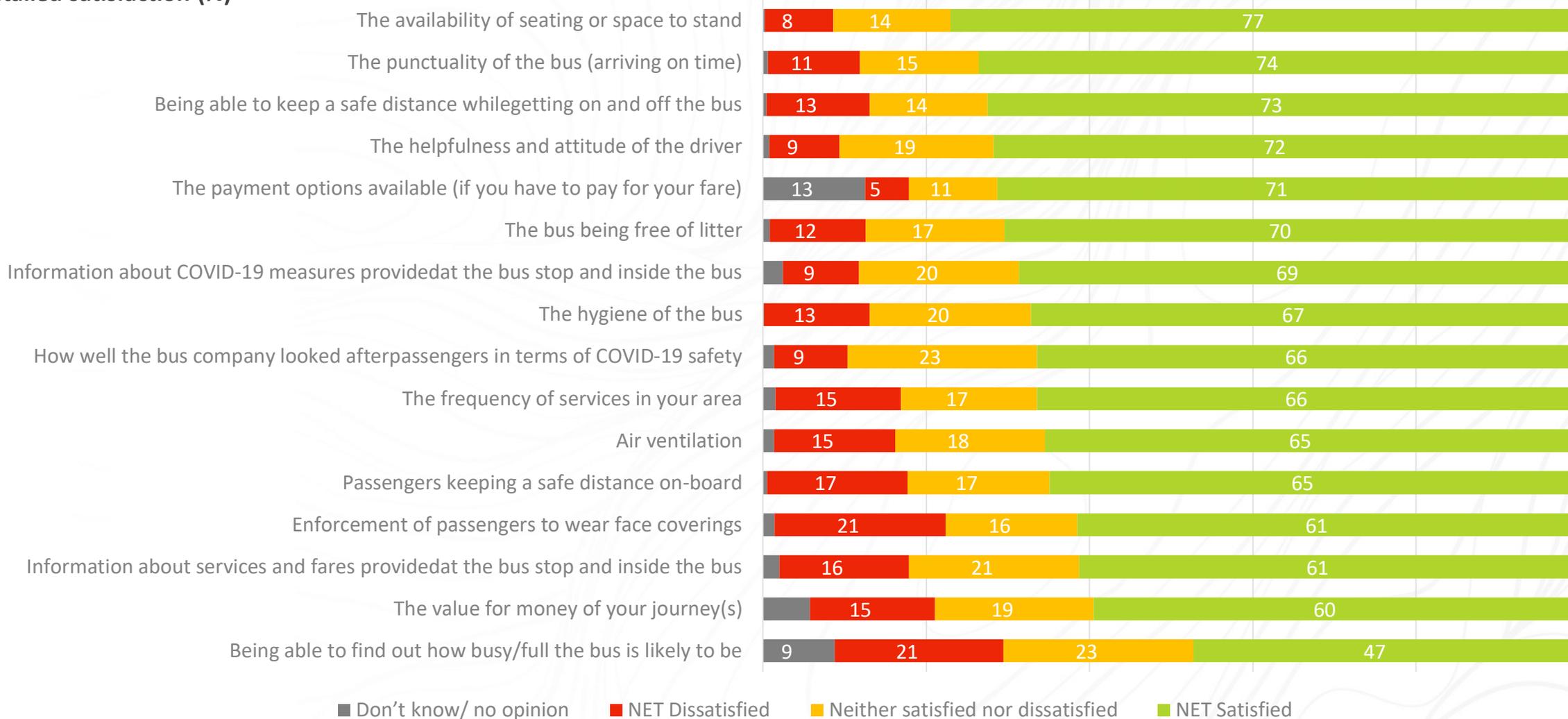
- Scotland: 91% (as it was in 2018 too)
- England (excl. London): 89%
- Wales: N/A

Availability of seating tops the satisfaction metrics in Scotland. Being able to find out how busy or the bus is likely to be or if it will be full is ranked bottom for satisfaction

Scotland



Detailed satisfaction (%)

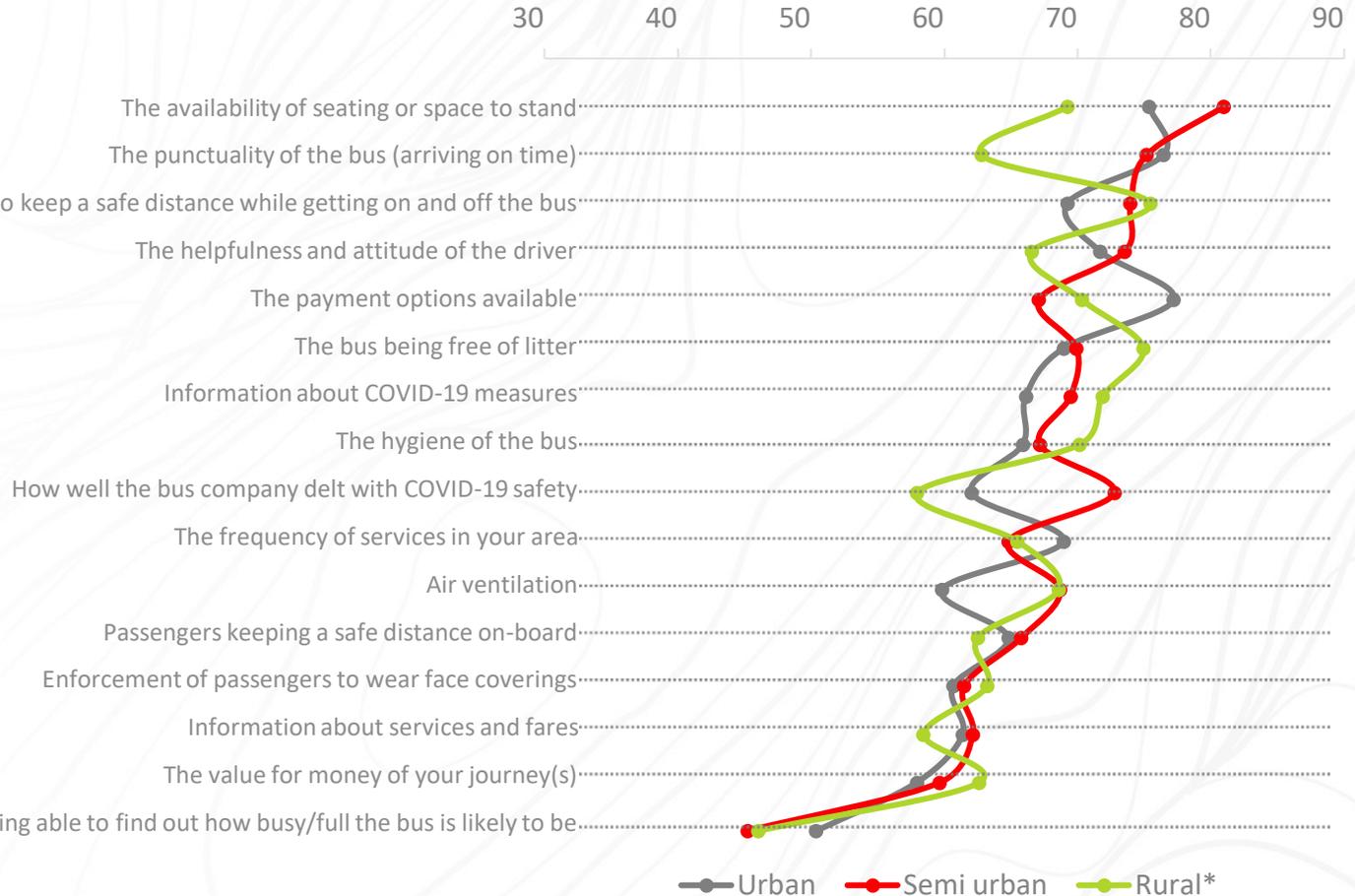
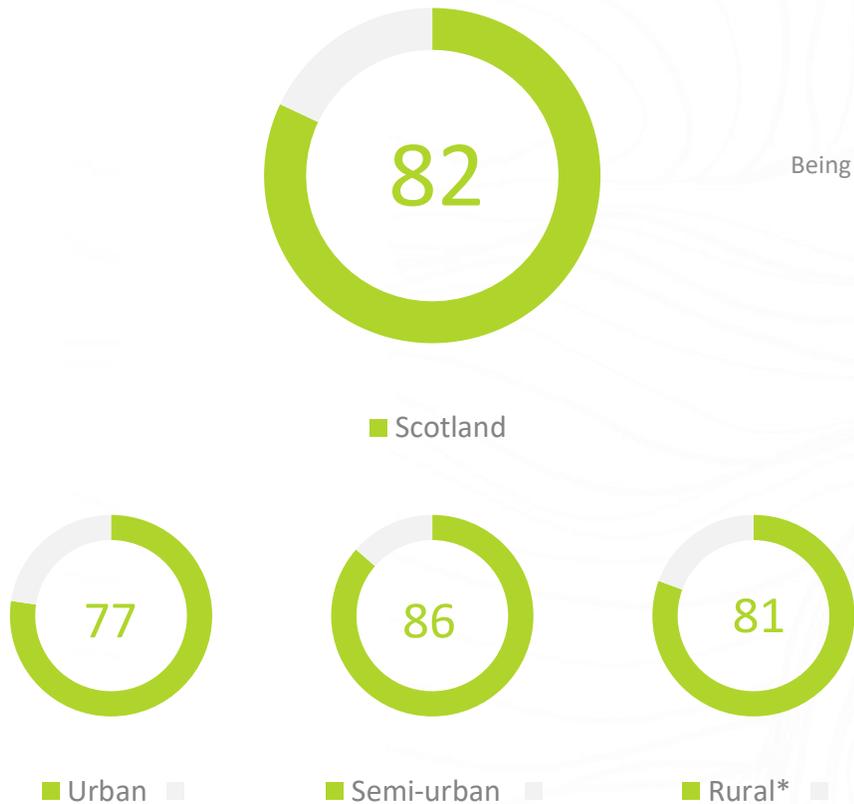


Overall and detailed satisfaction in Scotland varies a lot based on the area type, with passengers from semi urban areas recording the highest satisfaction



Overall satisfaction – by area type

Detailed satisfaction – by area type

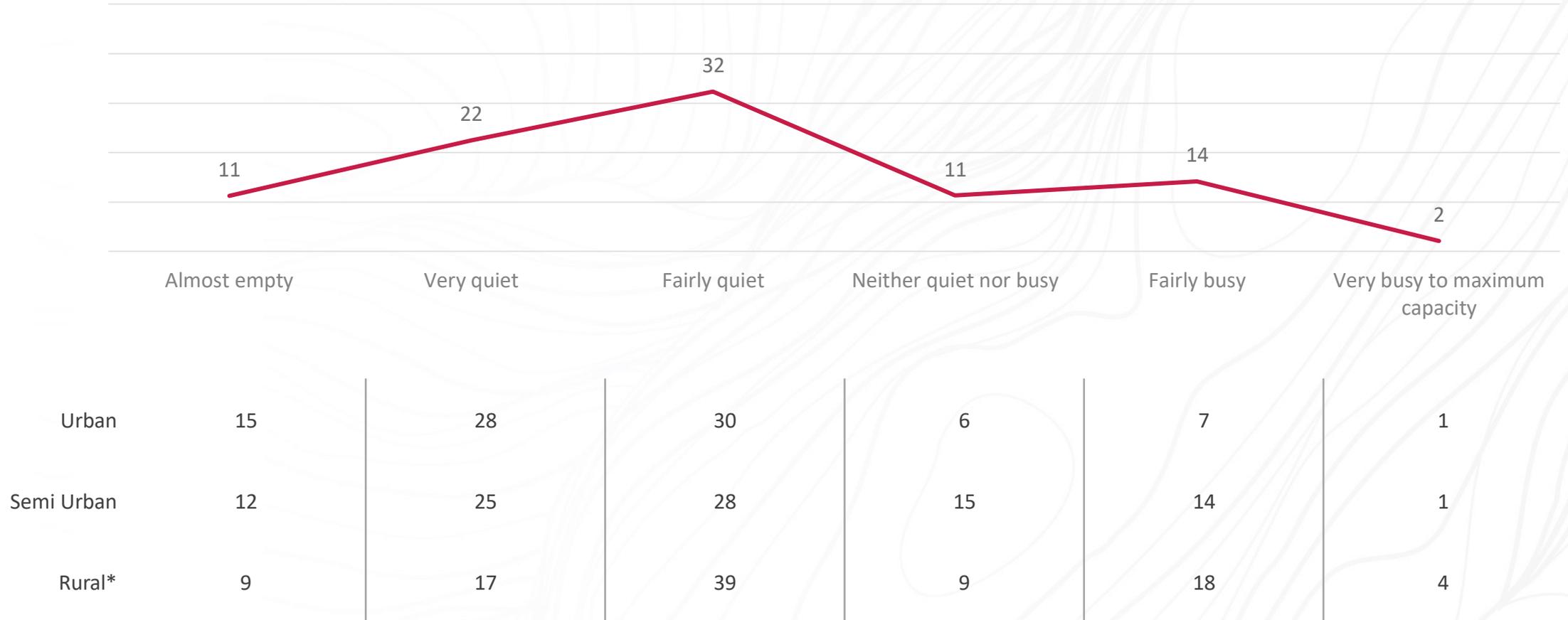


* Cautious – low base size

Q2_7: Taking into account your overall experience of travelling by bus since March 2020, how satisfied were you with your bus journey/s? / Q2_5: Thinking about your overall experience of taking the bus since March 2020, how satisfied were you with the following...? Scotland = 360, Urban n= 145, Semi-urban n= 161, Rural n=54

The experience of how busy the buses were varied a lot based on the type of area that passengers were located in

How busy the were the buses (%)



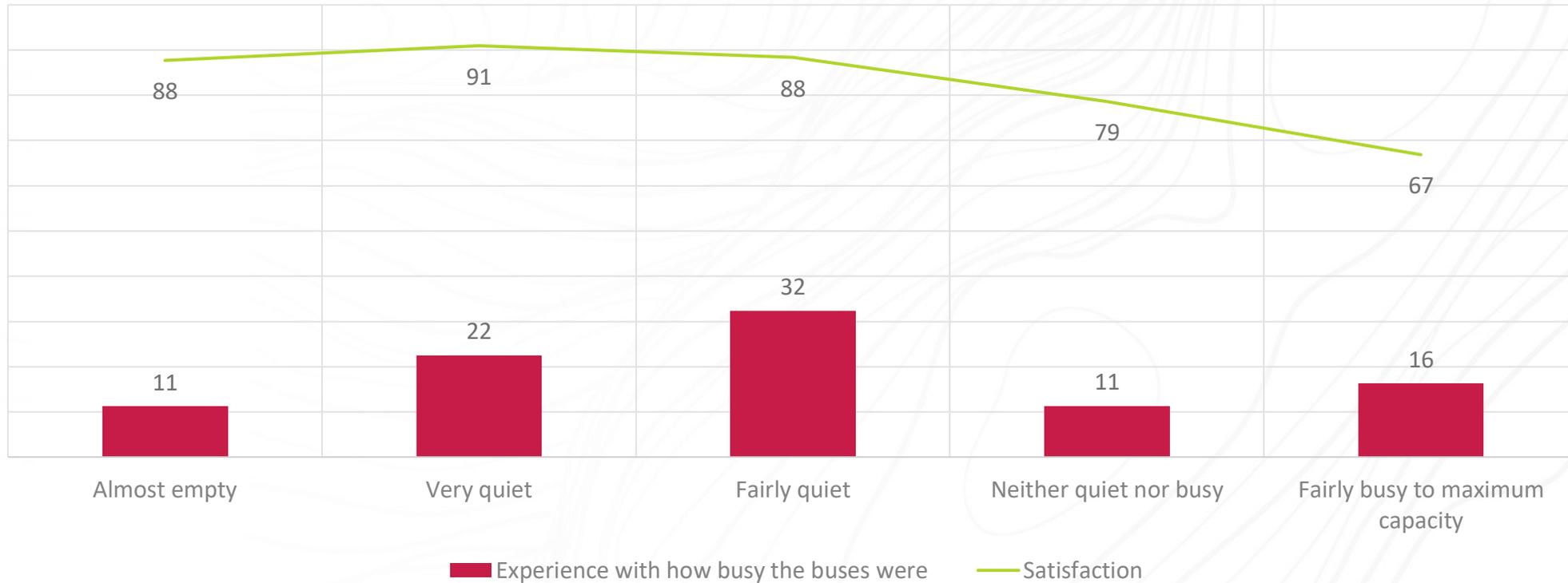
* Cautious – low base size

There is a clear correlation between satisfaction and how busy the bus was, as a very busy bus causes satisfaction to suddenly drop

Scotland



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



* Cautious – low base size

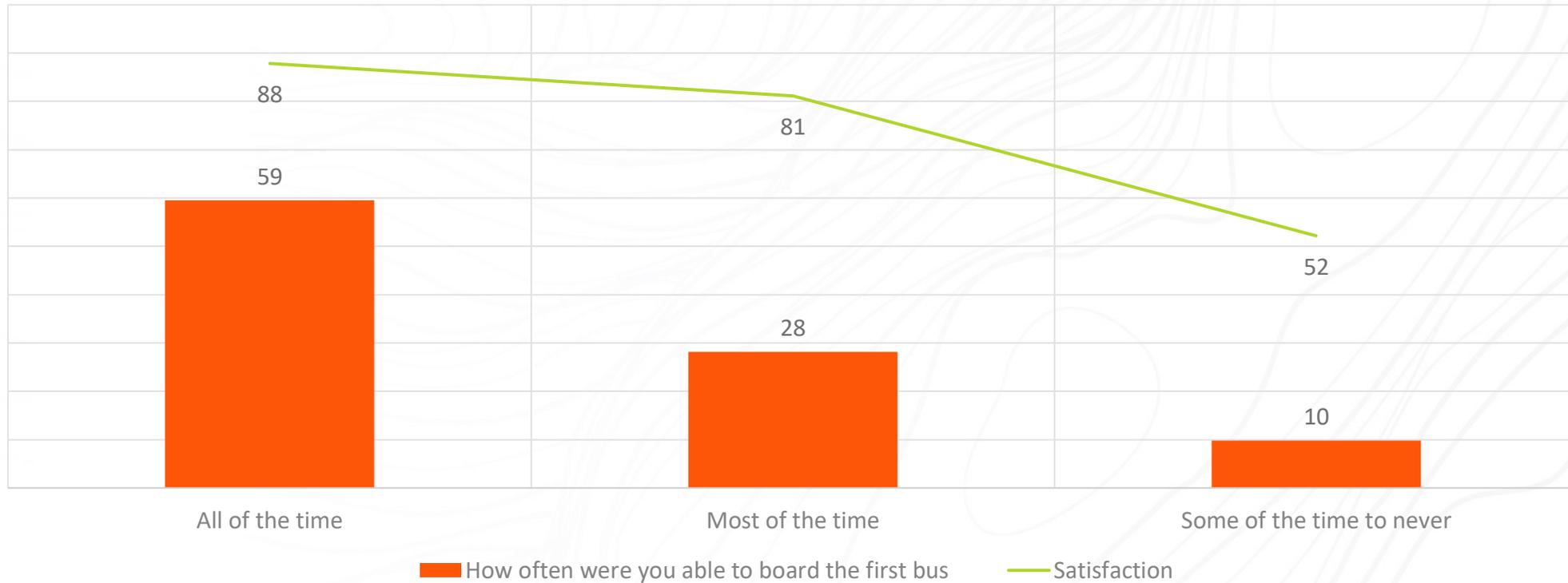
Q2_9: And how busy have the buses been when making your journeys? / Q2_7: Taking into account your overall experience of travelling by bus since March 2020, how satisfied were you with your bus journey/s? Base = 360, Almost empty n= 39, Very quiet n= 70, Fairly quiet n= 119, Neither nor n= 46, Fairly busy to max capacity n= 66

Satisfaction is also closely linked with passengers' experience of being able to board their first bus. For those who never had an issue their satisfaction is at 88%

Scotland



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



* Cautious – low base size

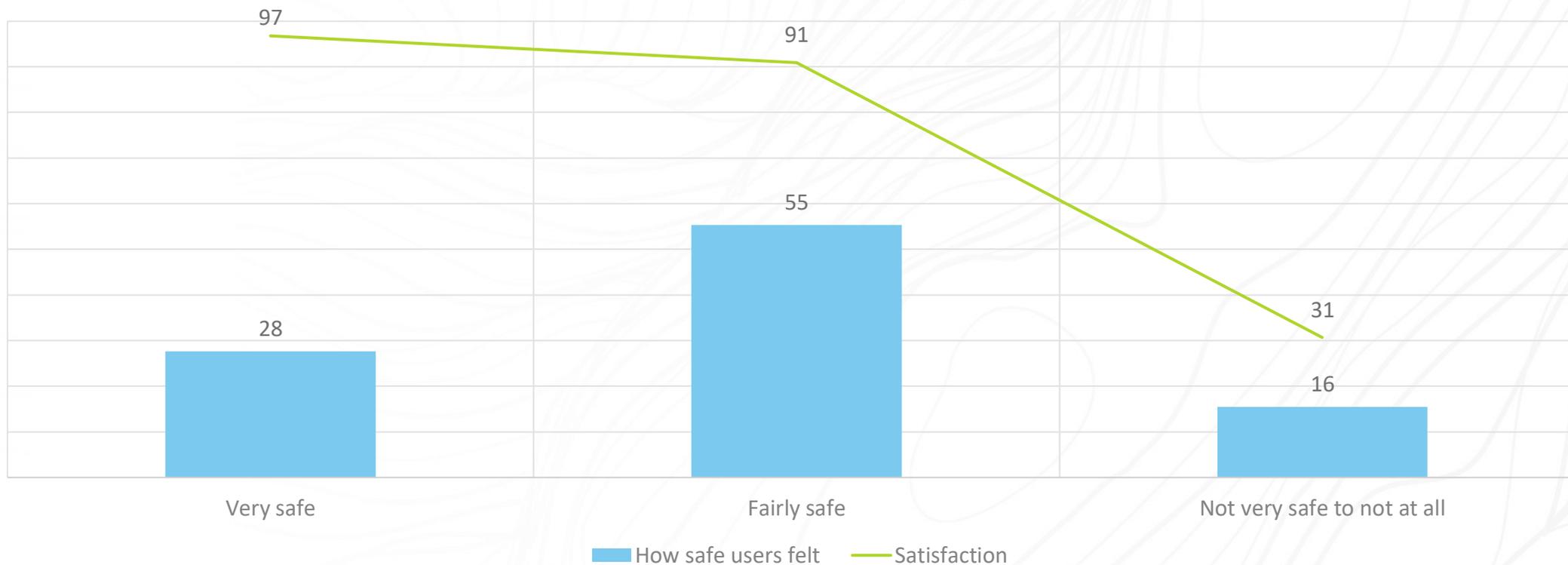
Q2_10: Still thinking about your overall experience of taking the bus since March 2020, how often were you able to board the first bus for the route you were catching that arrived at your stop? / Q2_7: Taking into account your overall experience of travelling by bus since March 2020, how satisfied were you with your bus journey/s? Base = 360, All the time n= 193, Most of the time n= 110, Some of the time to never n= 46

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

Scotland



Satisfaction based on how safe passengers felt (%)



* Cautious – low base size

Q2_6: Thinking about COVID-19, how safe did you generally feel during your bus journey/s? / Q2_7: Taking into account your overall experience of travelling by bus since March 2020, how satisfied were you with your bus journey/s? Very safe n= 97, Fairly safe n= 198, Not very safe to not at all n= 60



Evolution from past usage to future usage

transportfocus 

 BVA BDRC

The use of buses has decreased to less than a third since the beginning of the COVID-19 crisis. Very frequent use was most impacted by the pandemic

Scotland



Frequency of bus usage (%)

Pre pandemic:

8.9 trips per month*

(vs. 8.9 in GB)

Current (March/April 2021):

2.7 trips per month*

(vs. 3.2 in GB)

I don't use the bus (%)

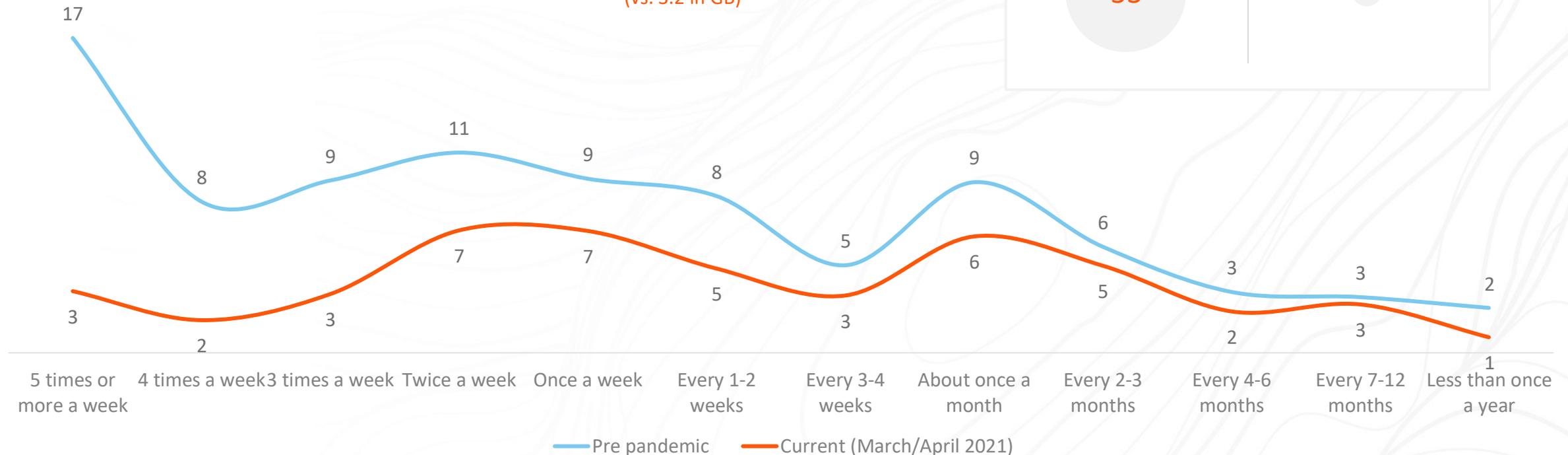
8



Don't know/Unsure (%)

2

1



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 = 981

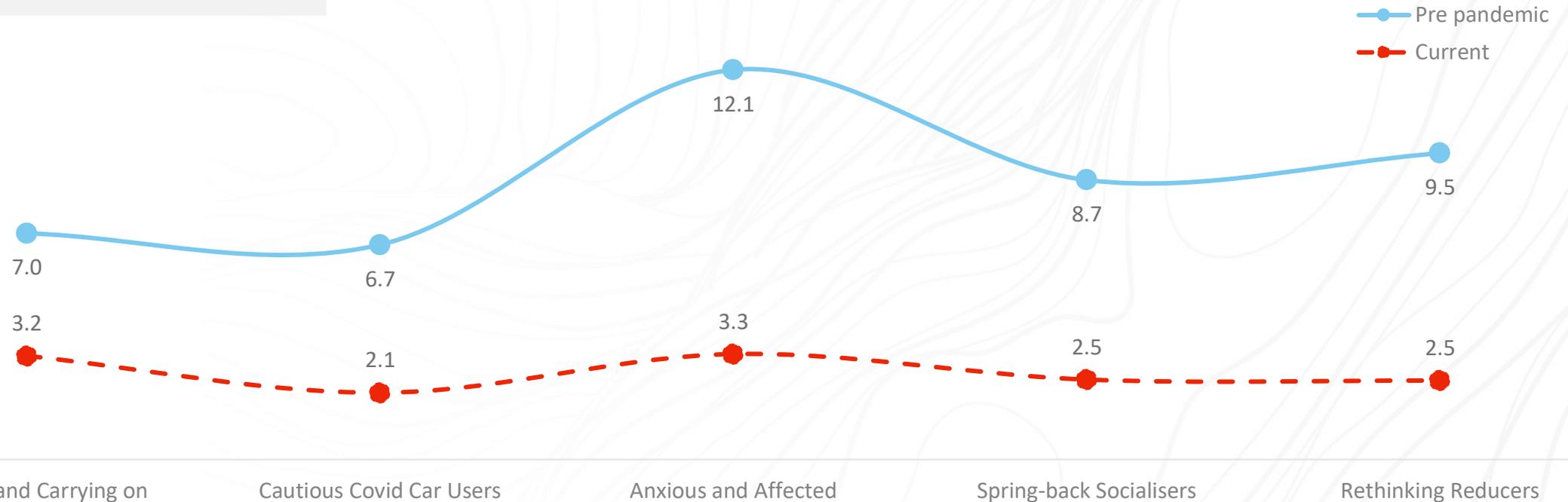
*Average number of trips per month is calculated by assigning a value to each of the time values which reflects their overall value relative to a month. Then an average is taken of these.

The Anxious and Affected were the most frequent users pre pandemic and have reduced their use the most (by almost 9 journeys a month). Rethinking Reducers follow closely behind, making around 7 fewer journeys a month

Scotland



Average number of trips per month



Difference average trip per month Current – Pre pandemic

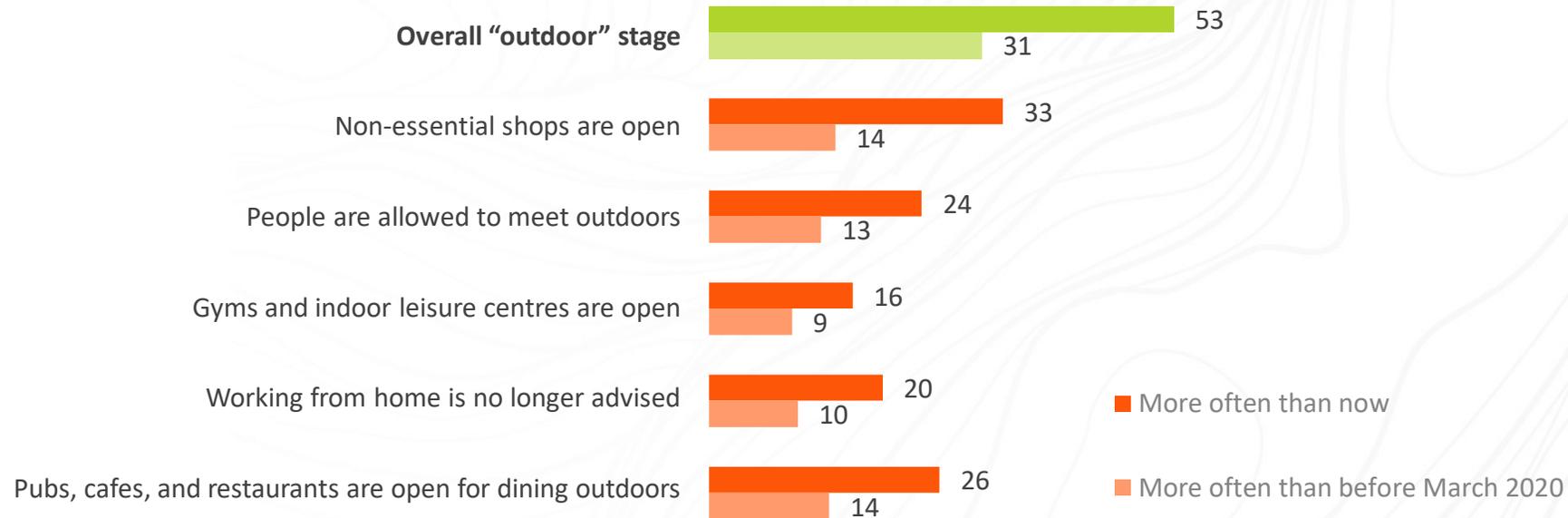


From the “outdoor” stage, the opening of non-essential shops is the strongest driver to increase bus use

Scotland



Will travel more than now (%)

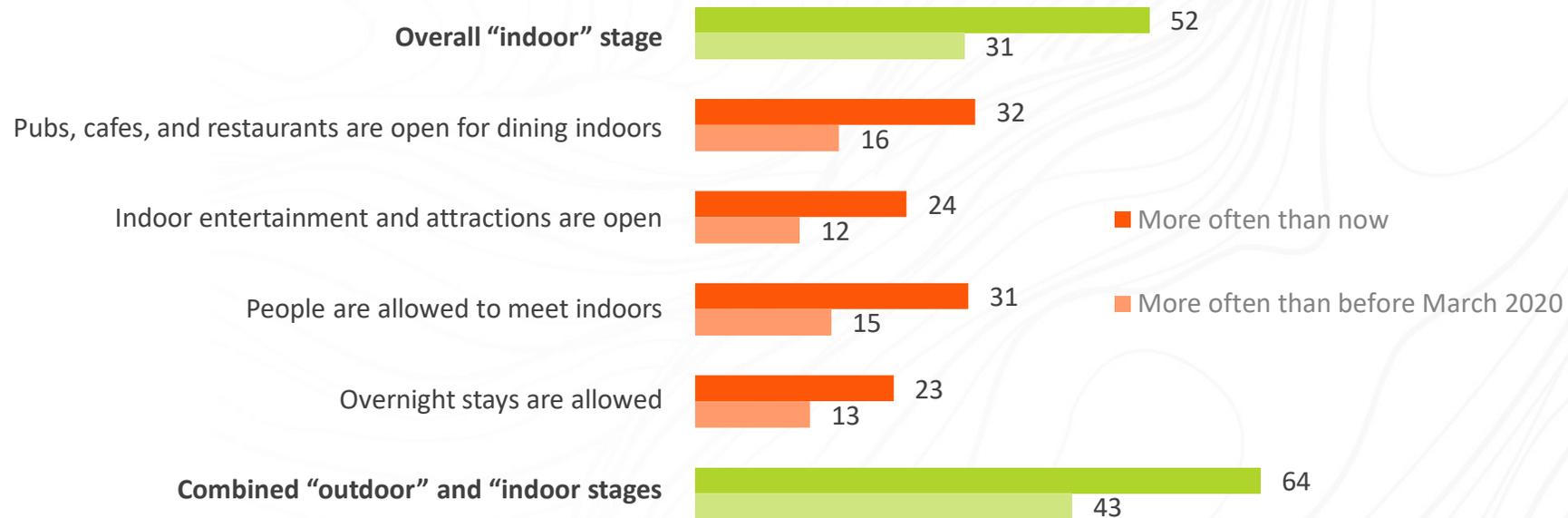


From the “indoor” stage, the opening of pubs and restaurants indoors and being able to meet people indoors are the two main factors for increasing bus use

Scotland



Will travel more than now (%)

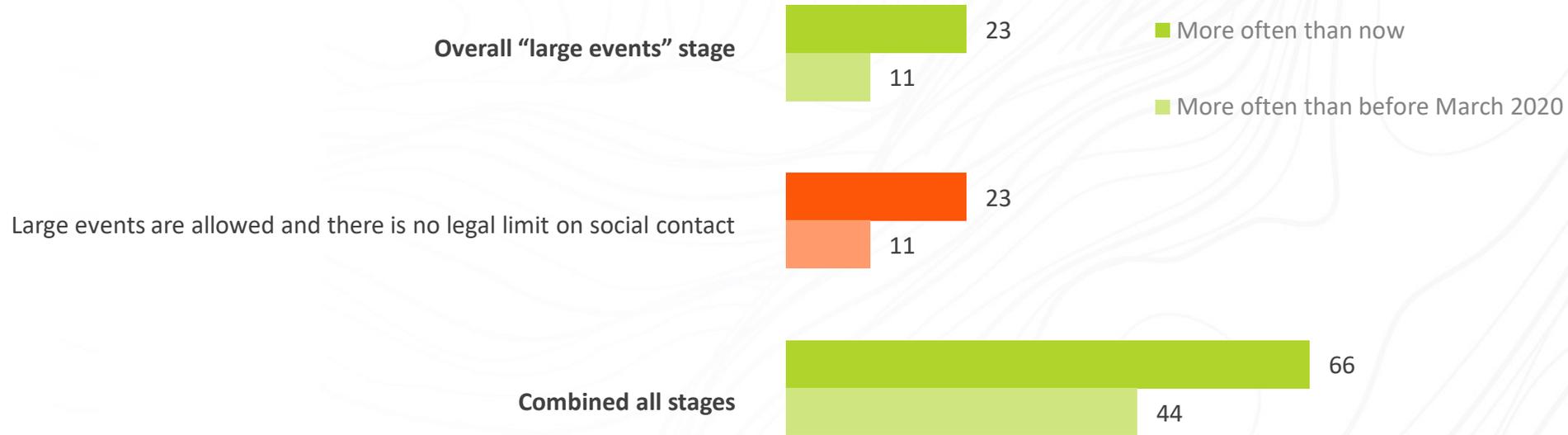


The final stage, with regards to large events being allowed and no legal limit on social contact, is not a particularly strong incentive for passengers to use the bus a lot more

Scotland

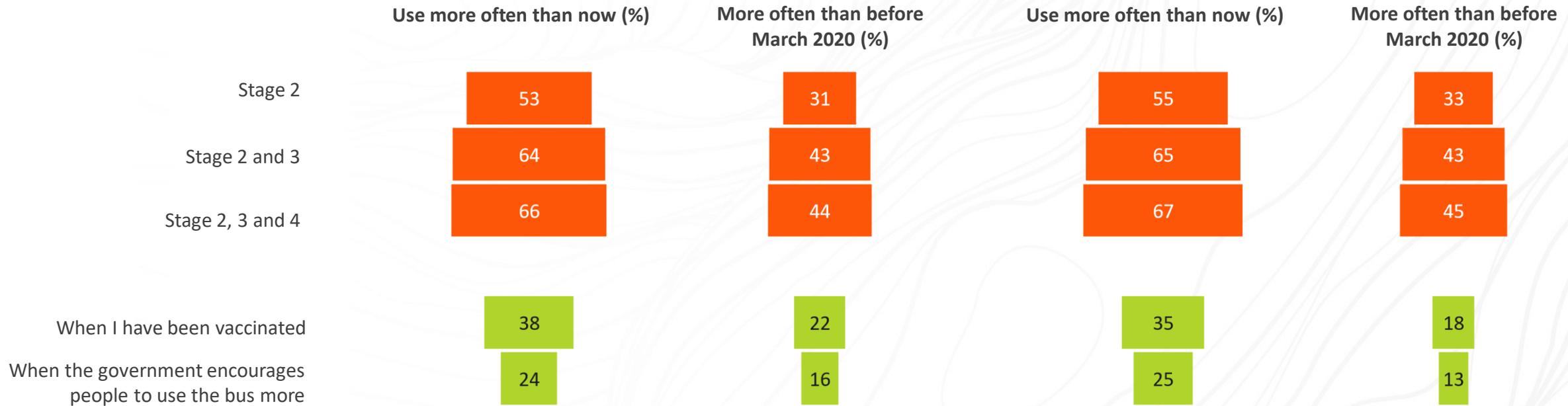
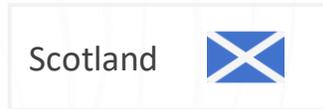


Will travel more than now (%)



In Great Britain and in Scotland, the easing of restrictions has a considerable impact on bus use, even when compared to pre-pandemic

Restrictions easing – impact on bus use

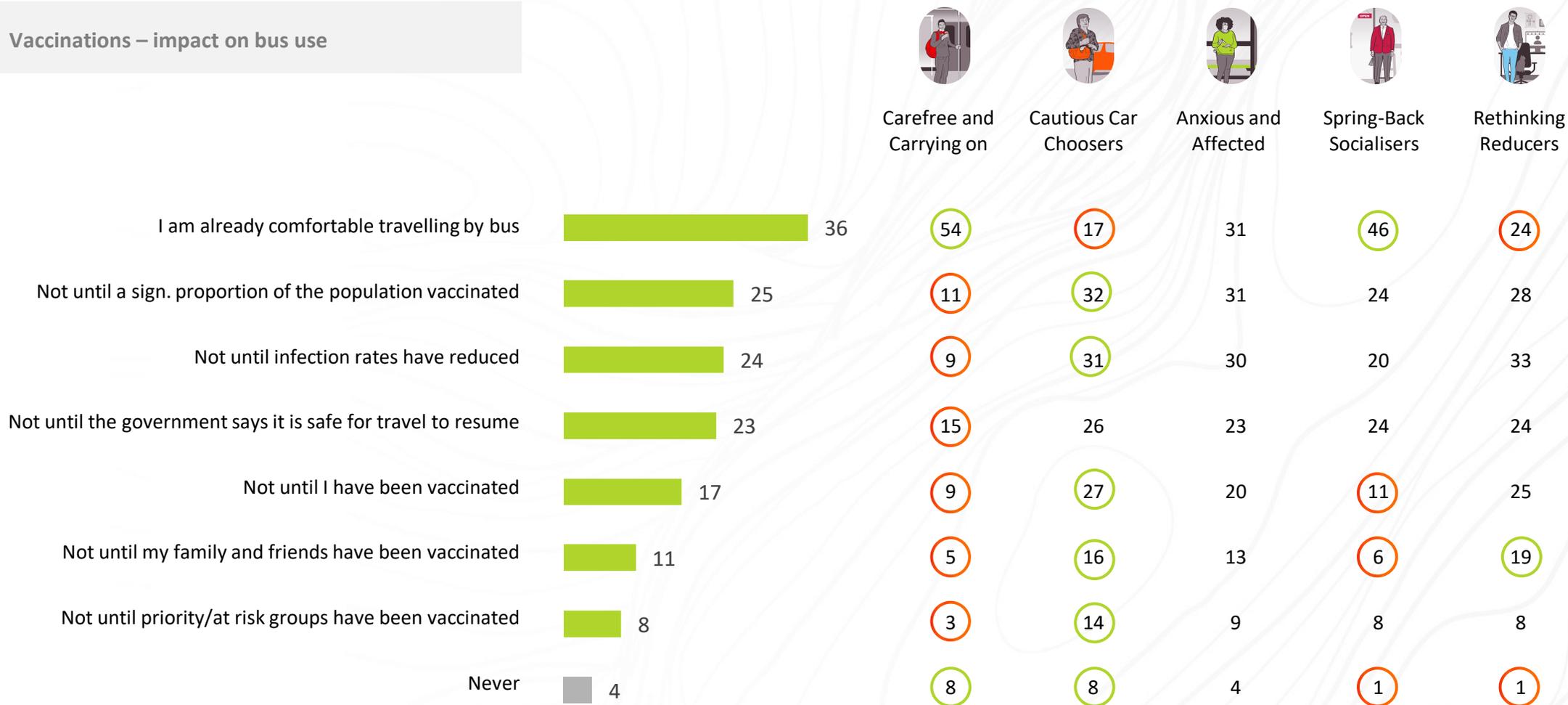


A third are already comfortable travelling by bus, and this rises to around half in the Carefree and Carrying on and Spring-Back socialisers segments. Vaccinations are likely to have some impact on the more cautious segments

Scotland



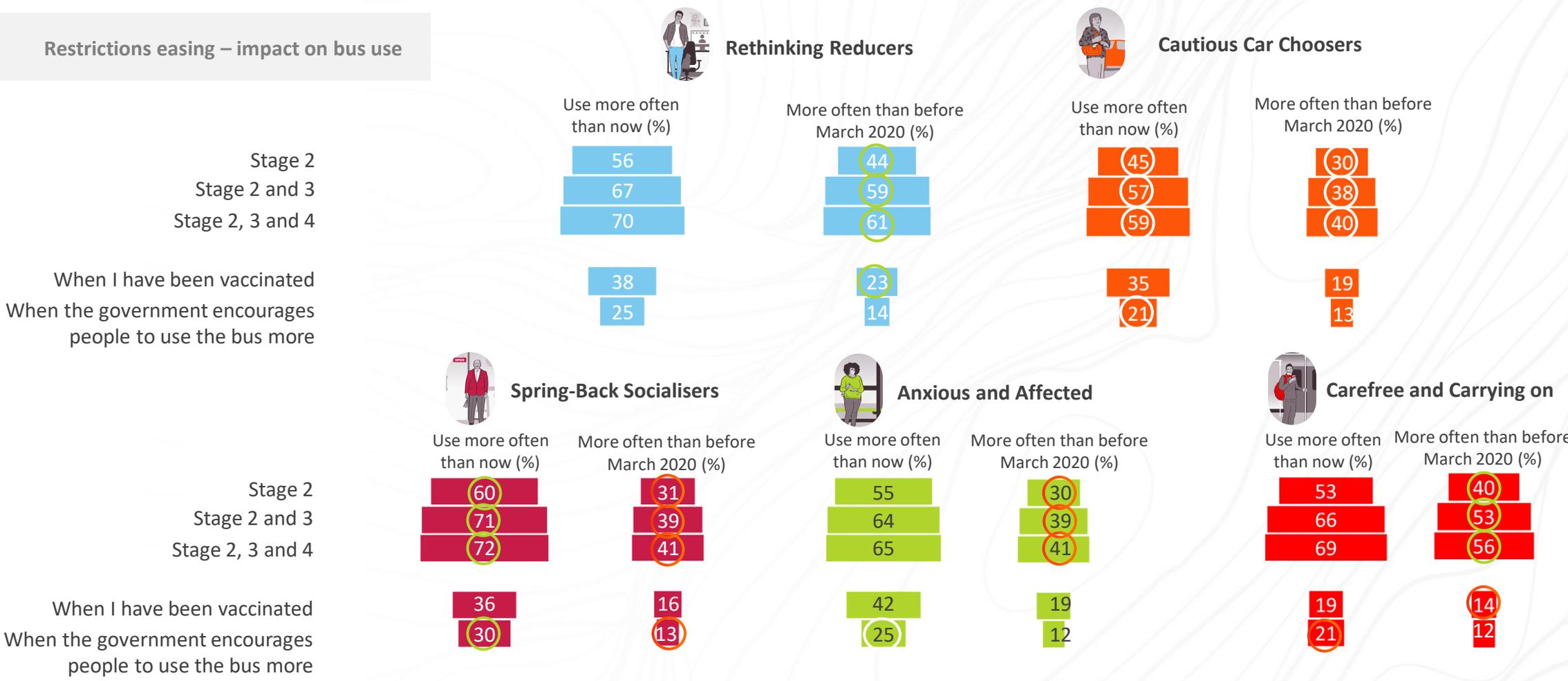
Vaccinations – impact on bus use



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



Restrictions easing – impact on bus use

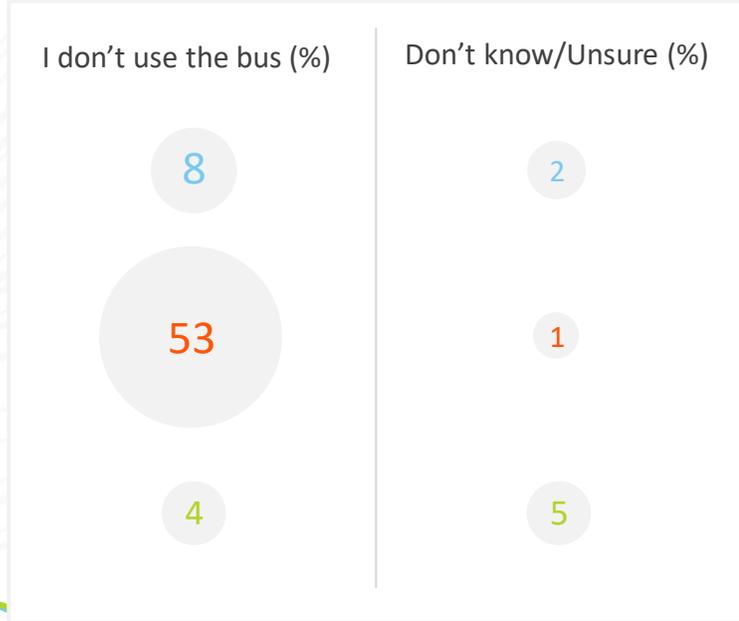
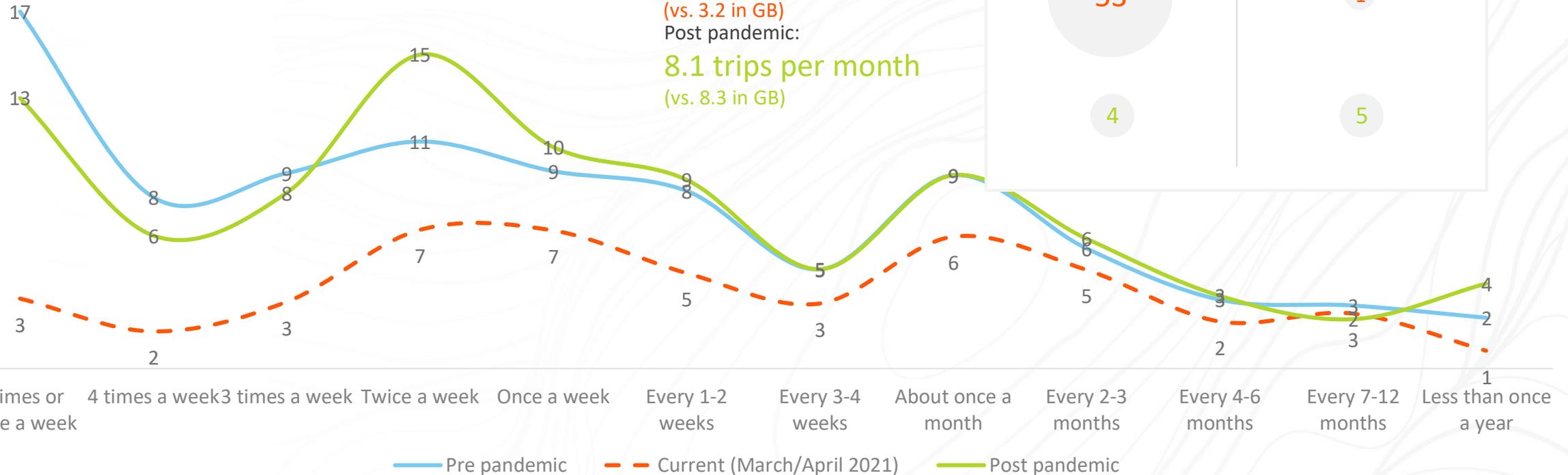


Q5_1. Which, if any, of the following changes will encourage you to use the bus more often than you do now? And which, if any, would encourage you to use the bus more often than you did before the COVID restrictions in March 2020? Base Cautious Car Choosers n= 1,173, Anxious and Affected n= 1,444, Spring-Back Socialisers n= 2,079, Rethinking Reducers n= 760, Carefree and Carrying on n=1,109

In Scotland, by the end of the pandemic, the average number of trips per month is predicted to be close to pre-pandemic levels with a big shift to journeys twice a week

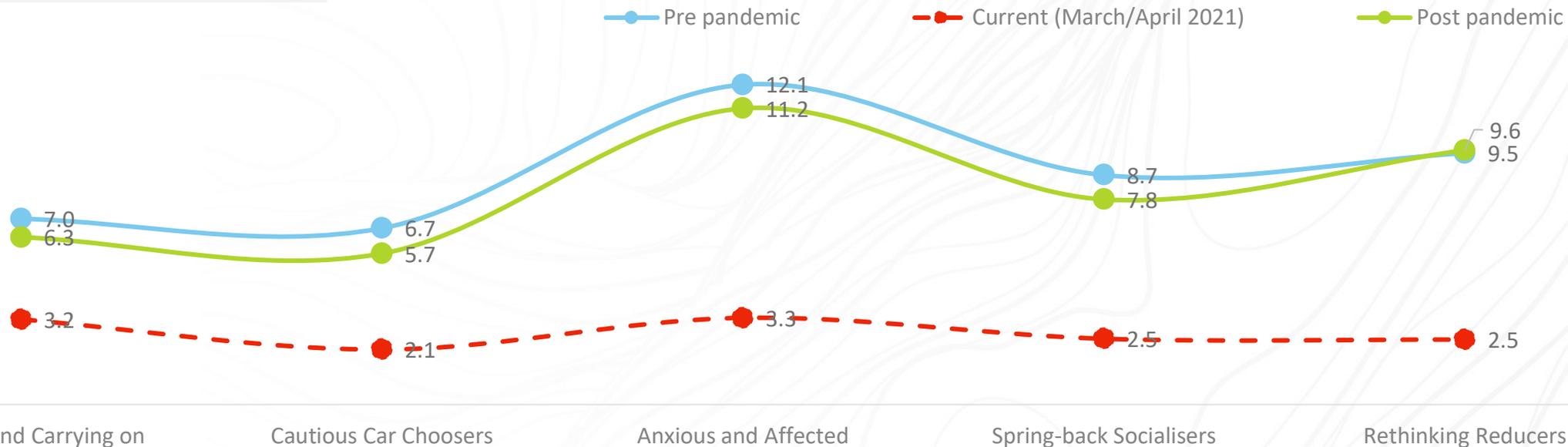


Frequency of bus usage (%)



While absolute levels of using the bus pre and post pandemic vary by the different segments, the size of the gap is very similar for all except the Rethinking Reducers

Average number of trips per month



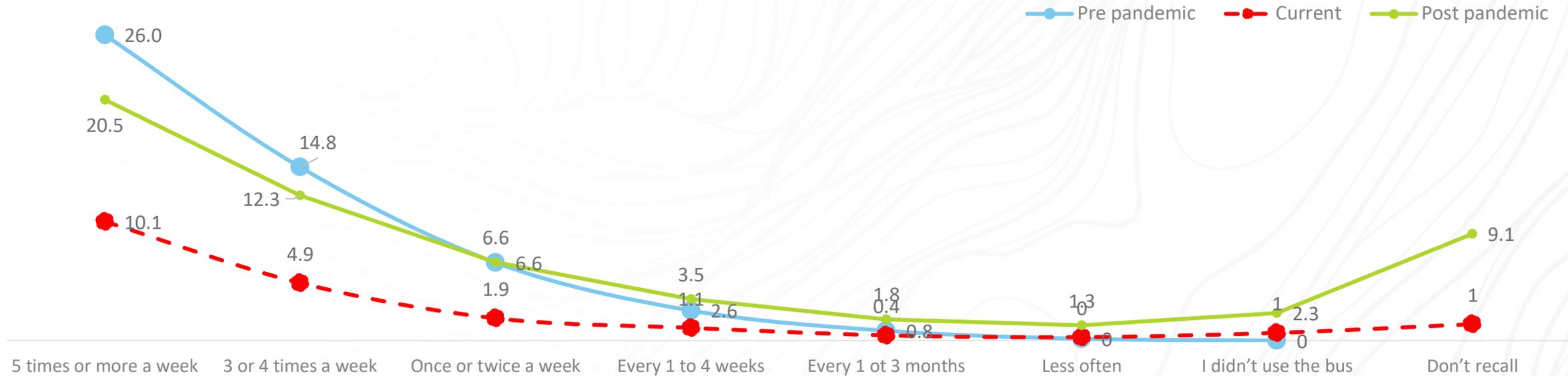
Difference average trip per month Pre pandemic – Post pandemic



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. S7: And how often will you be traveling by bus when all restrictions related to COVID-19 have been lifted and things have returned to “normal”? S11: How often do you currently use the bus? Carefree and Carrying on n= 196, Cautious Car Choosers n= 197, Anxious and Affected n= 215, Spring-Back Socialisers n= 244, Rethinking Reducers n= 117

While the frequent users pre pandemic are planning on decreasing their use post pandemic, the other groups are actually thinking about slightly increasing their use

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

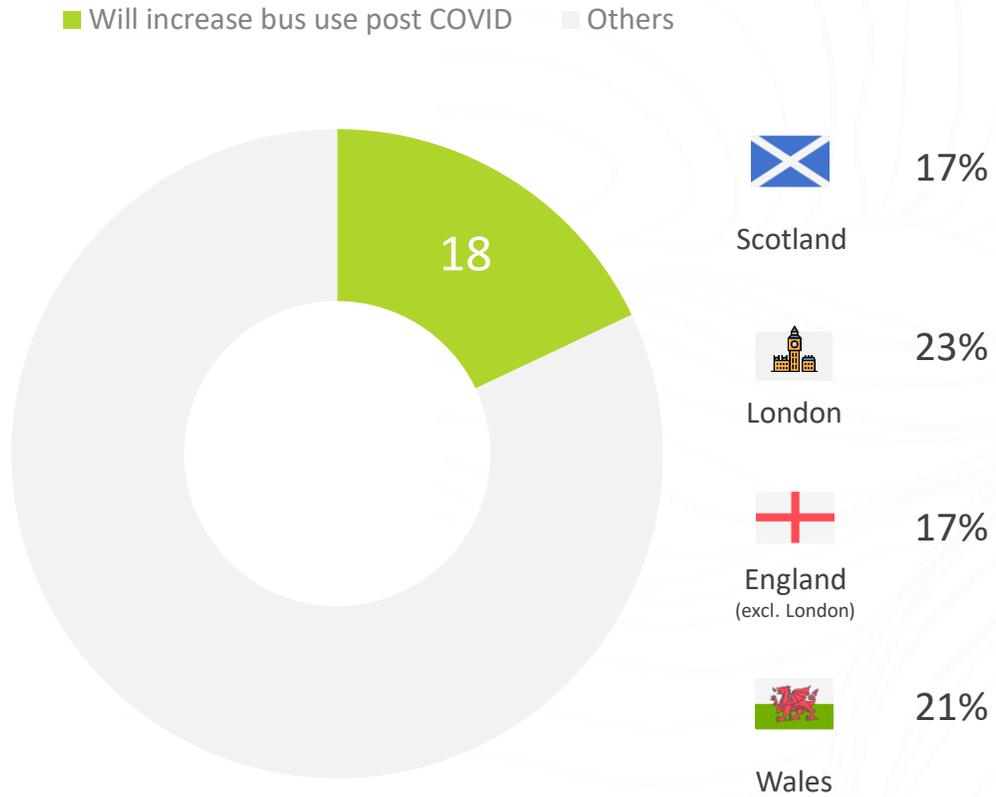


Difference average trip per month Pre pandemic – Post pandemic

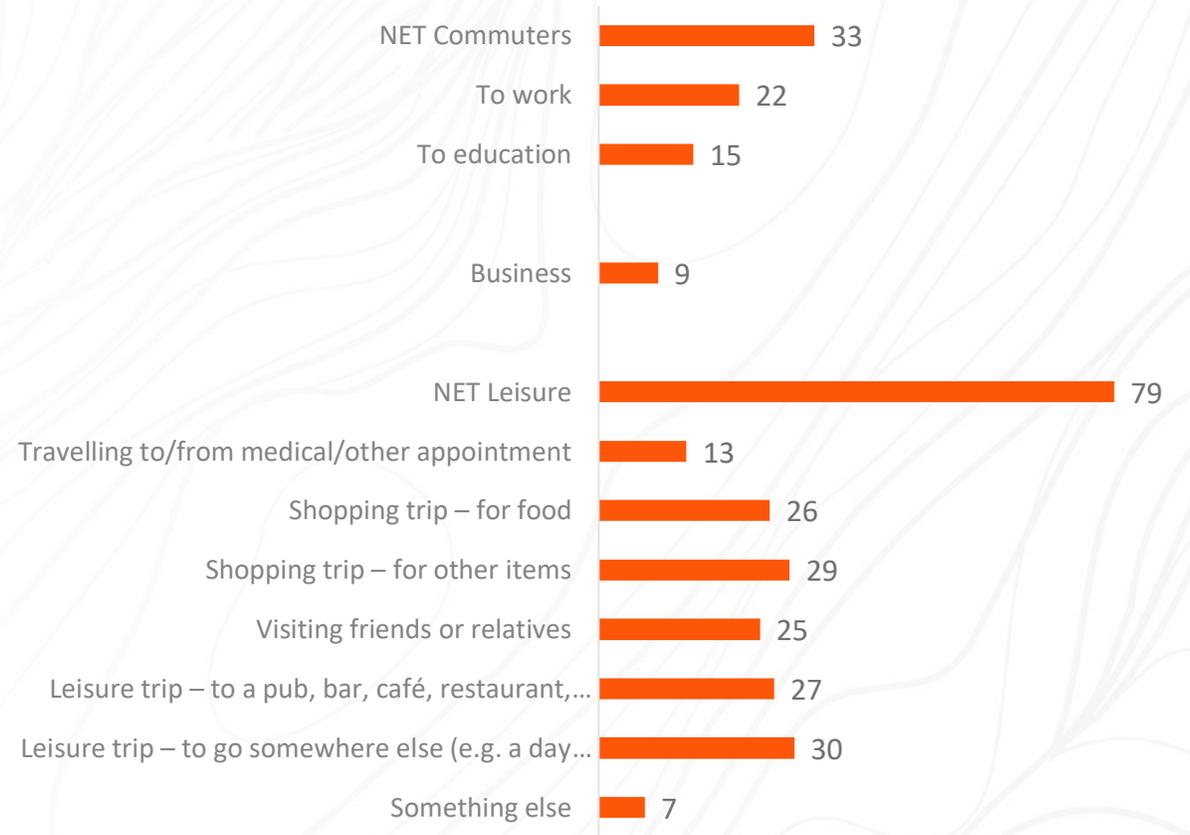


S9: Thinking about the time before the first coronavirus lockdown started in March 2020, how often did you usually travel by bus? Again, please exclude any coach services.
 S7: And how often will you be traveling by bus when all restrictions related to COVID-19 have been lifted and things have returned to "normal"? S11: How often do you currently use the bus? 5 times or more a week n= 1,243, 3 or 4 times a week n=1,780, Once or twice a week n=2,635, Every 1 to 4 weeks n= 1,227, Every 1 to 3 months n=1,256, Less often n= 1,051, I didn't use the bus n= 430, Don't recall n=455

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

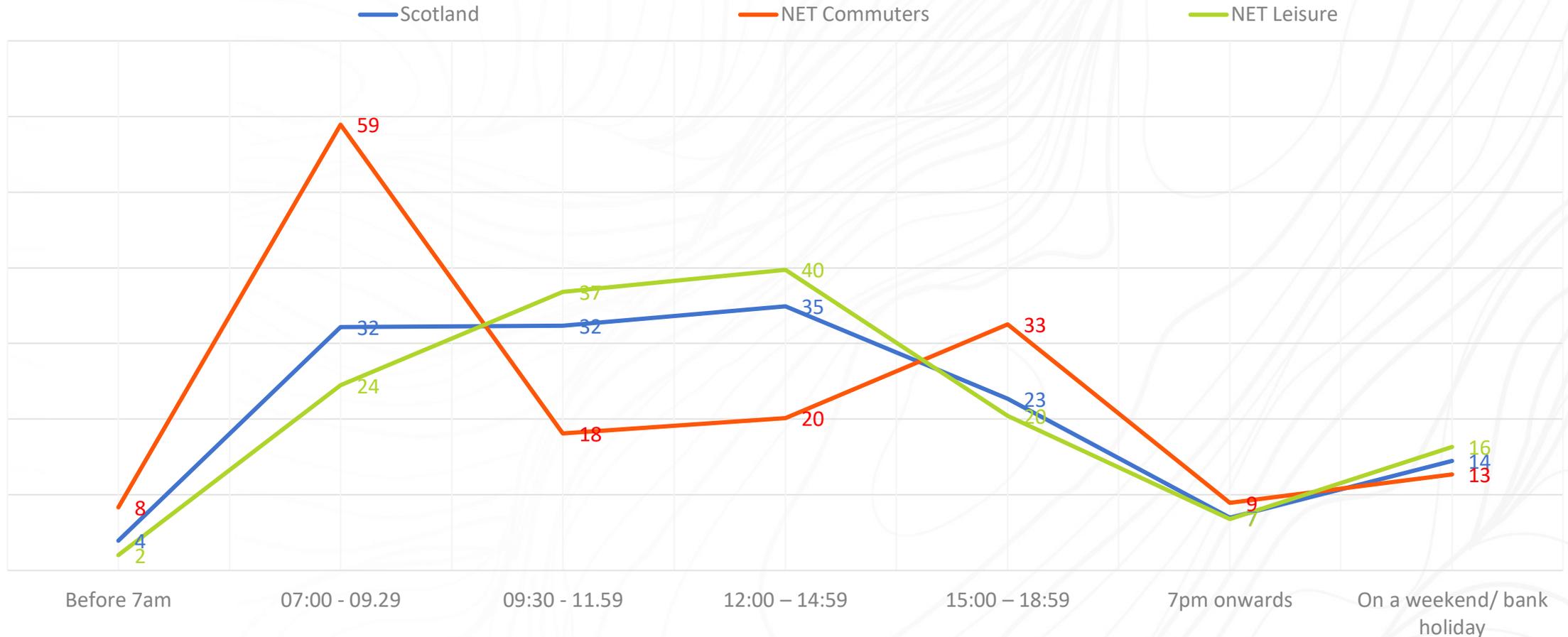


Trip type amongst those increasing bus use post COVID-19 (%)



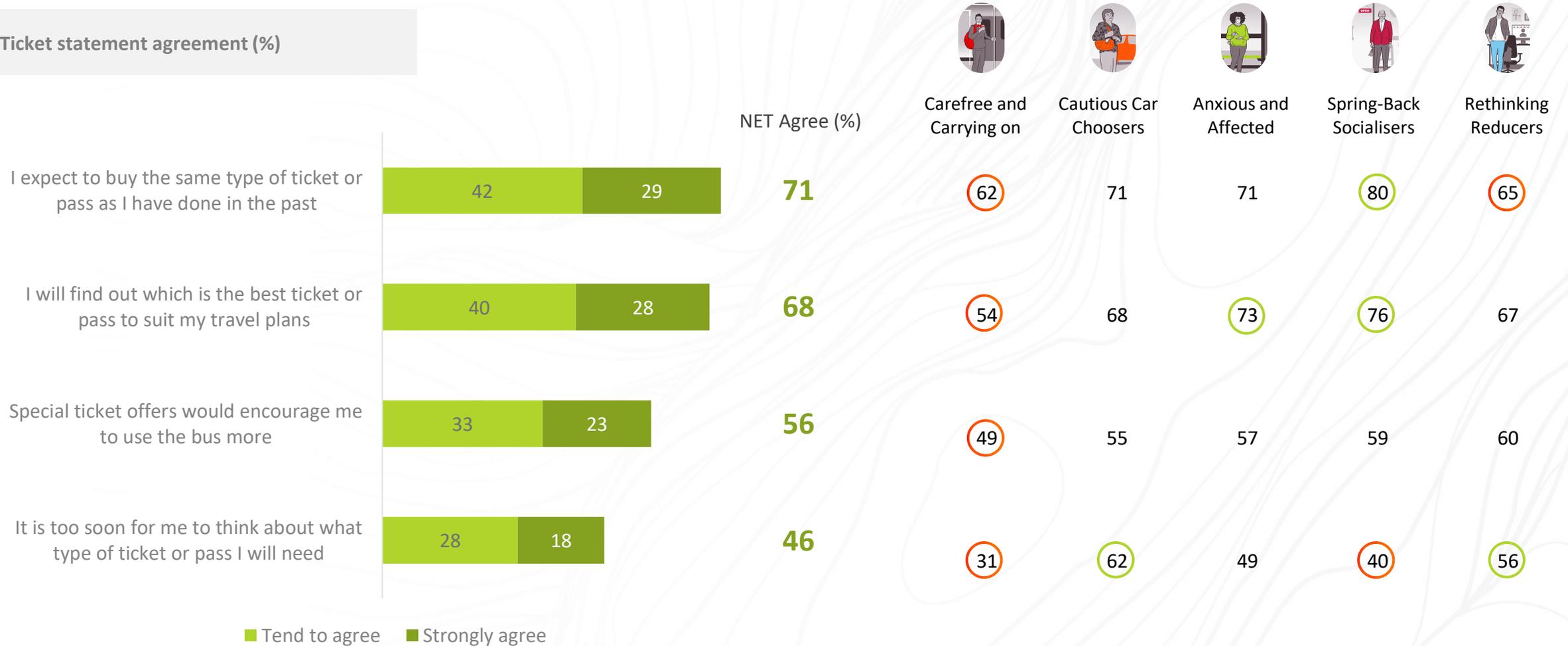
The most popular time slot for additional journeys is between 12:00-14:59, driven by leisure travellers, while additional commuter journeys will be heavily concentrated on the morning peak

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



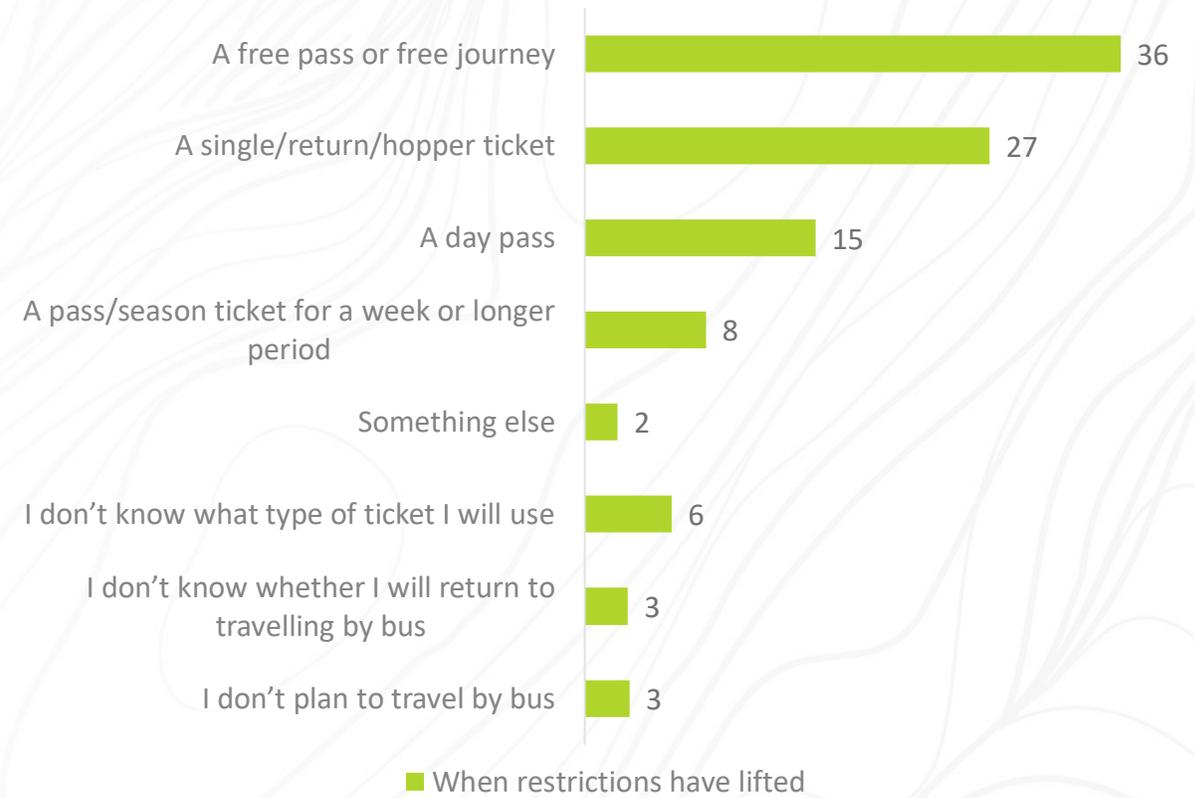
Many of those returning to bus travel will be reviewing which ticket to buy or will be looking for special offers for their future bus use

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 and day passes look set to decline in their share of use

Ticket type for travel in the future (%)



Use of alternative transport modes

transportfocus 

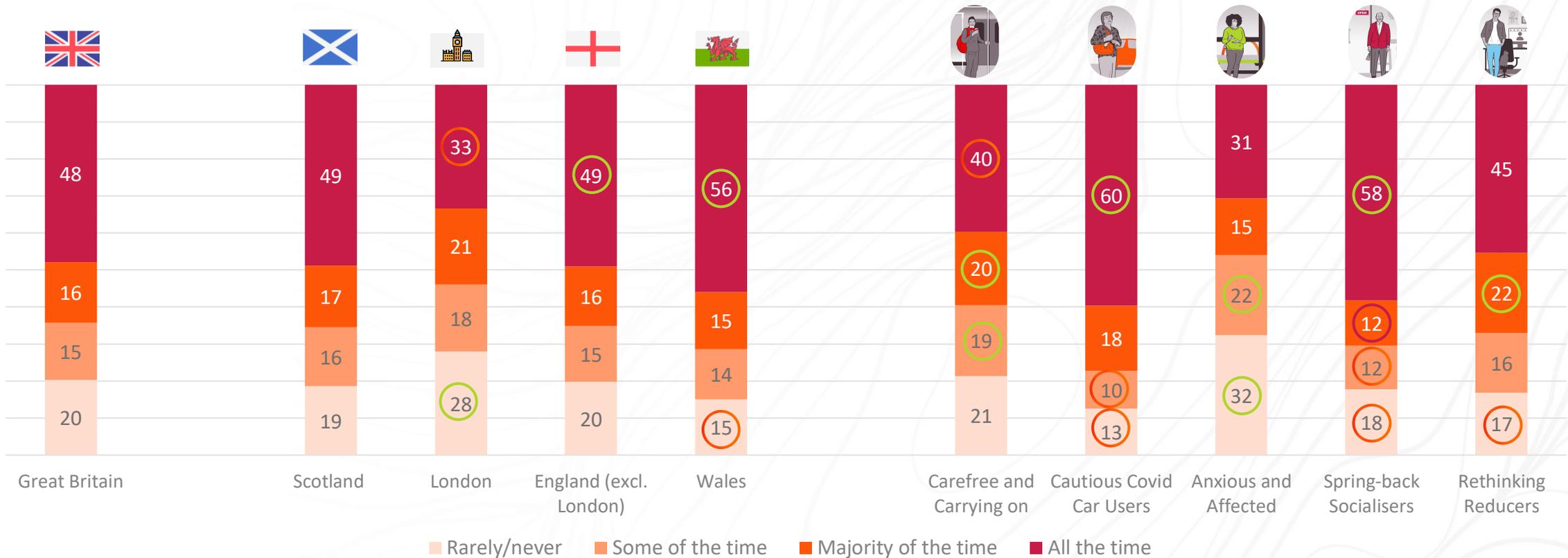
 BVA BDRC



Currently just under half have access to a car all the time. In Wales, respondents are significantly more likely to have a car than in the other nations. The Cautious Car Choosers and the Spring Back Socialisers are also more likely to have a car readily available whilst the Anxious and Affected are not



Frequency of car/motorbike availability (%)



Q7: How often is a car/motorbike available to you, either to drive or as a passenger?

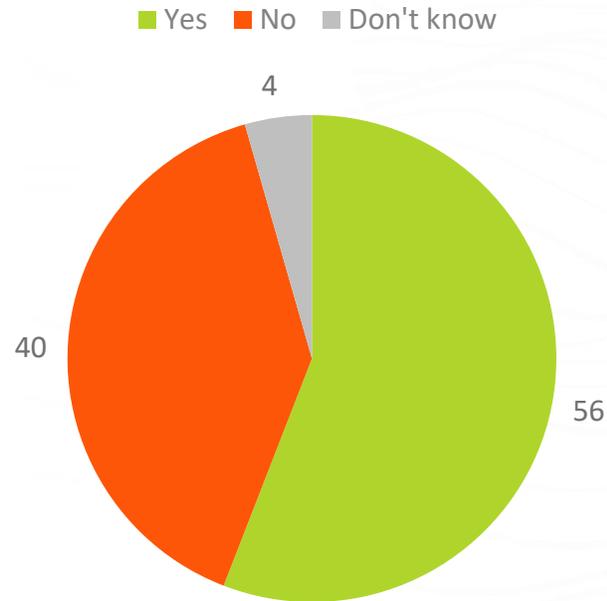
Carefree and Carrying on n= 2,173, Cautious Car Choosers n= 1,989, Anxious and Affected n= 1,989, Spring-Back Socialisers n= 3,015, Rethinking Reducers n=1,169, London n= 502, England (except London) n= 7,663, Scotland n= 981, Wales n= 1,189

Across Scotland 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

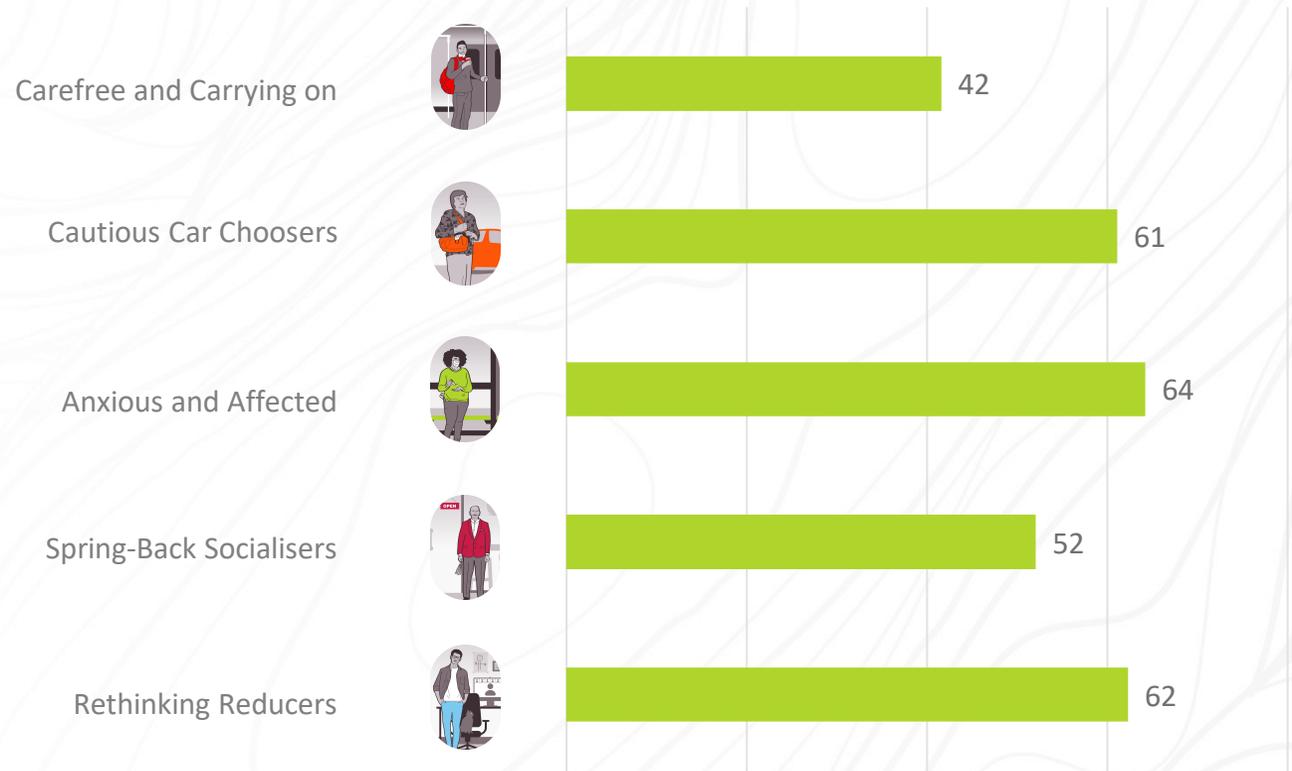
Scotland



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



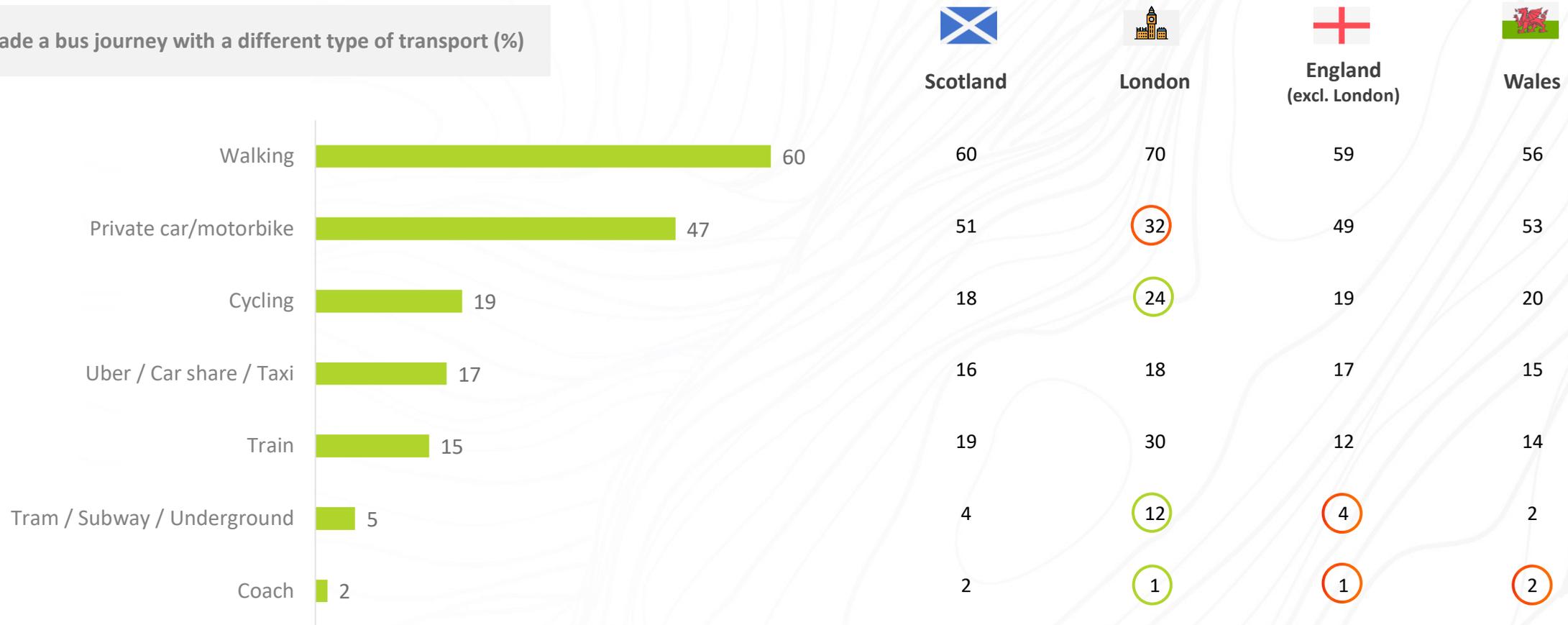
* Cautious – low base size



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

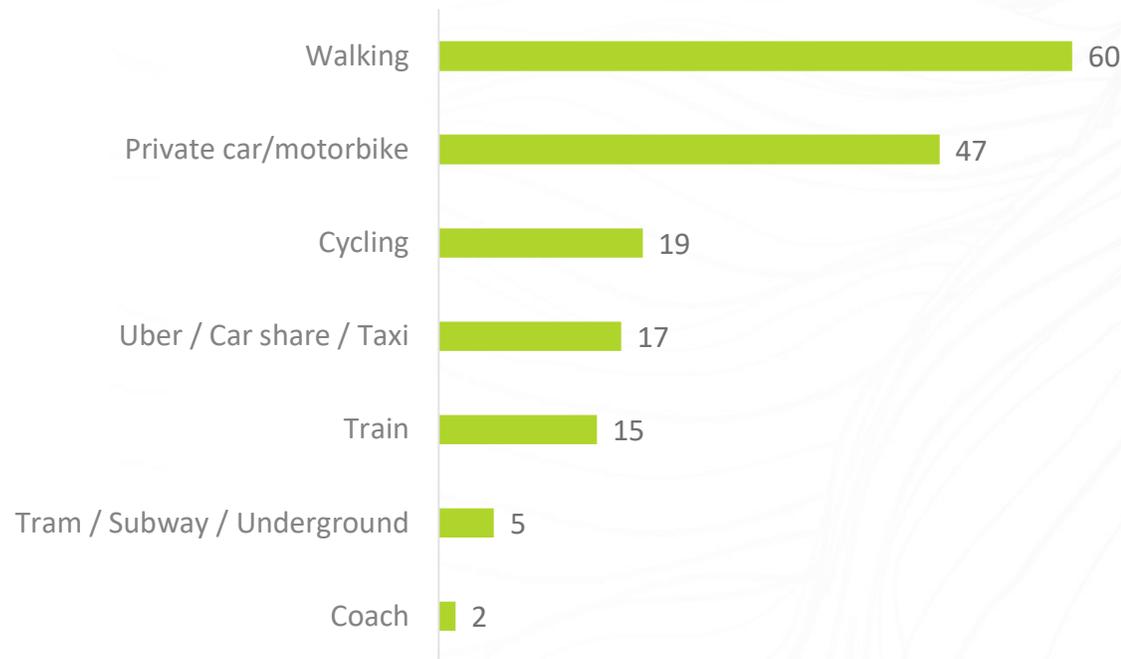


Made a bus journey with a different type of transport (%)

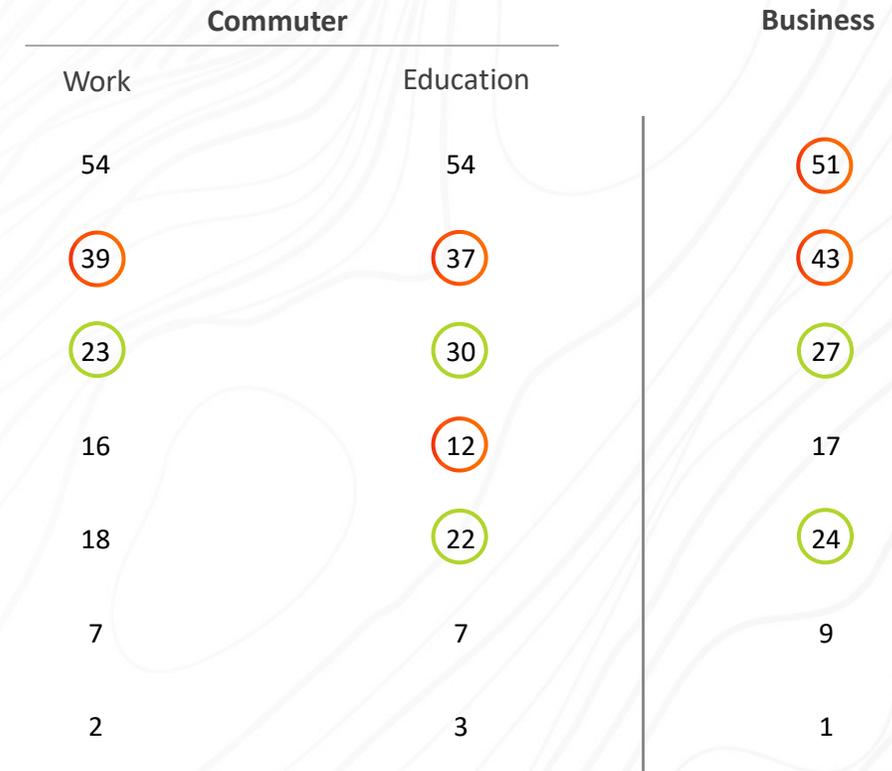


When bus users switched modes for commuting or business trips, they were more likely to cycle or use the train than for other journey types

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



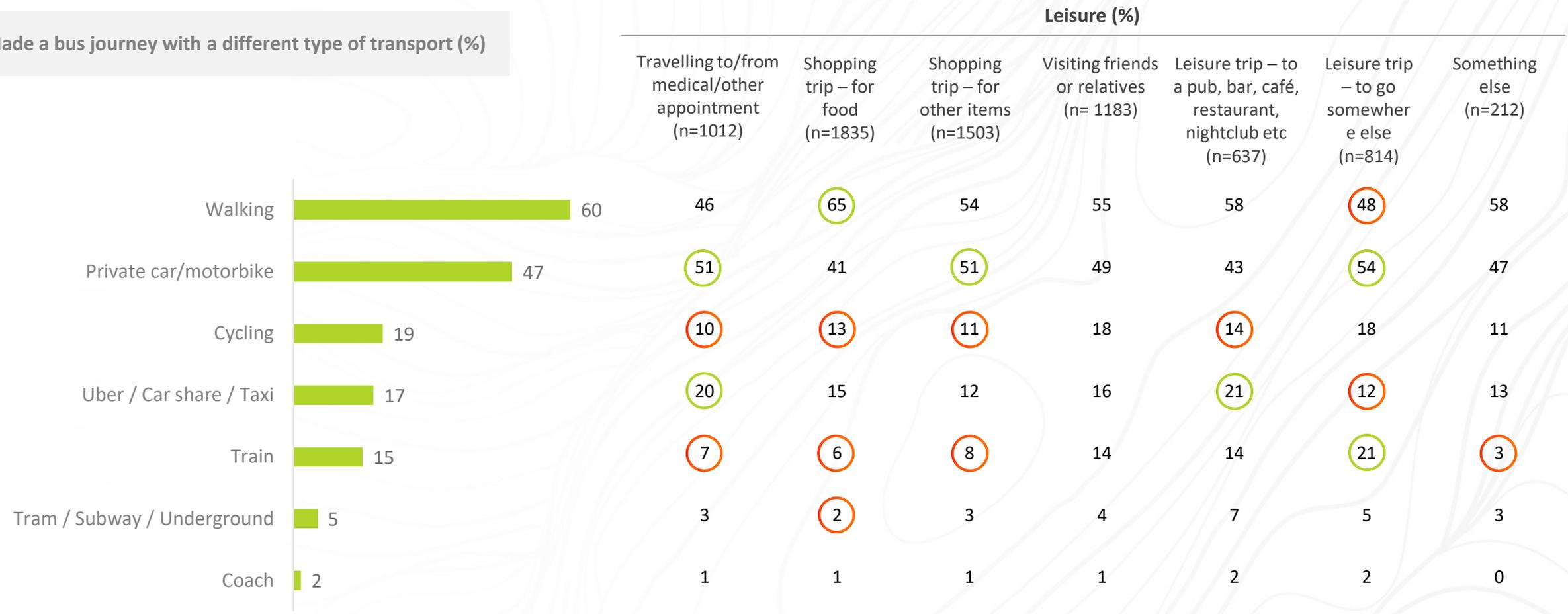
Made a bus journey with a different type of transport for a specific journey (%)



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



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



Understanding why people have not used the bus

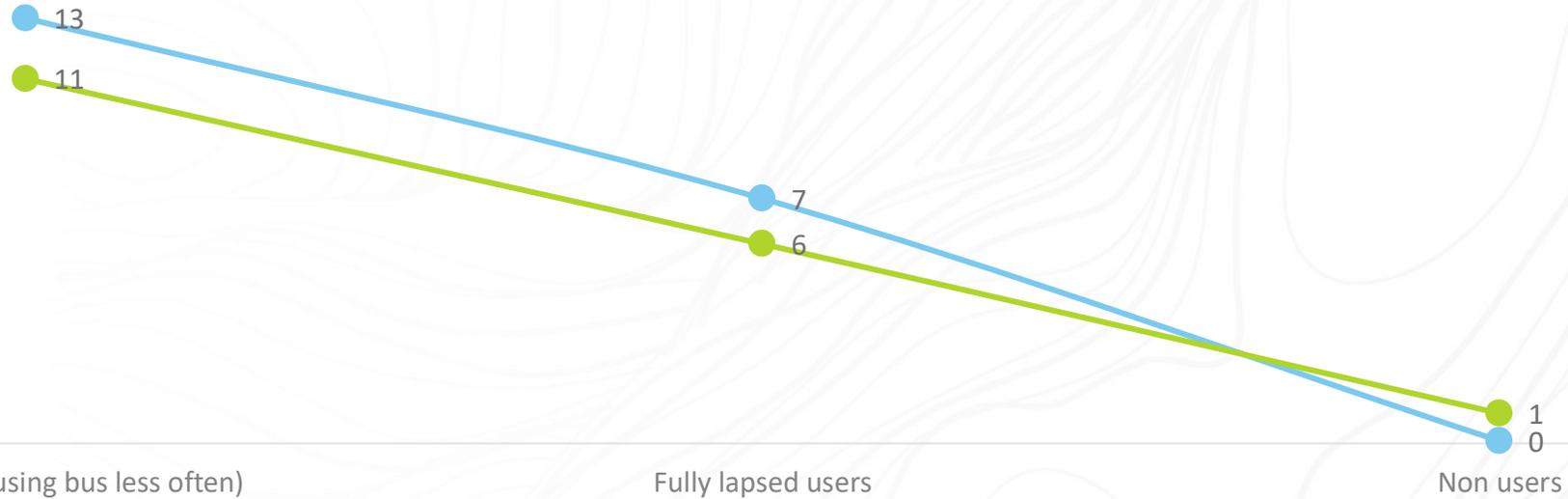
transportfocus 

 BVA BDRC



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

Average number of trips per month:



Difference average trip per month Pre pandemic – Post pandemic



● Pre pandemic ● Post pandemic

S7: And how often will you be traveling by bus when all restrictions related to COVID-19 have been lifted and things have returned to “normal”? 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. Current users = 237, fully lapsed users = 363, non-users = 236

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

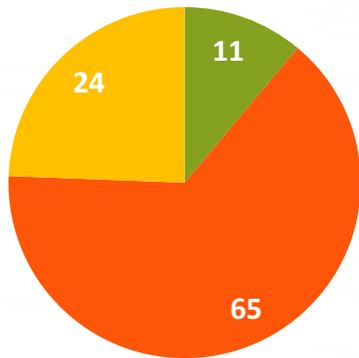
2 in 3 current passengers are using the bus less often. Those who live in urban areas are more likely to have increased their bus use than rural or semi-urban bus passengers

Scotland



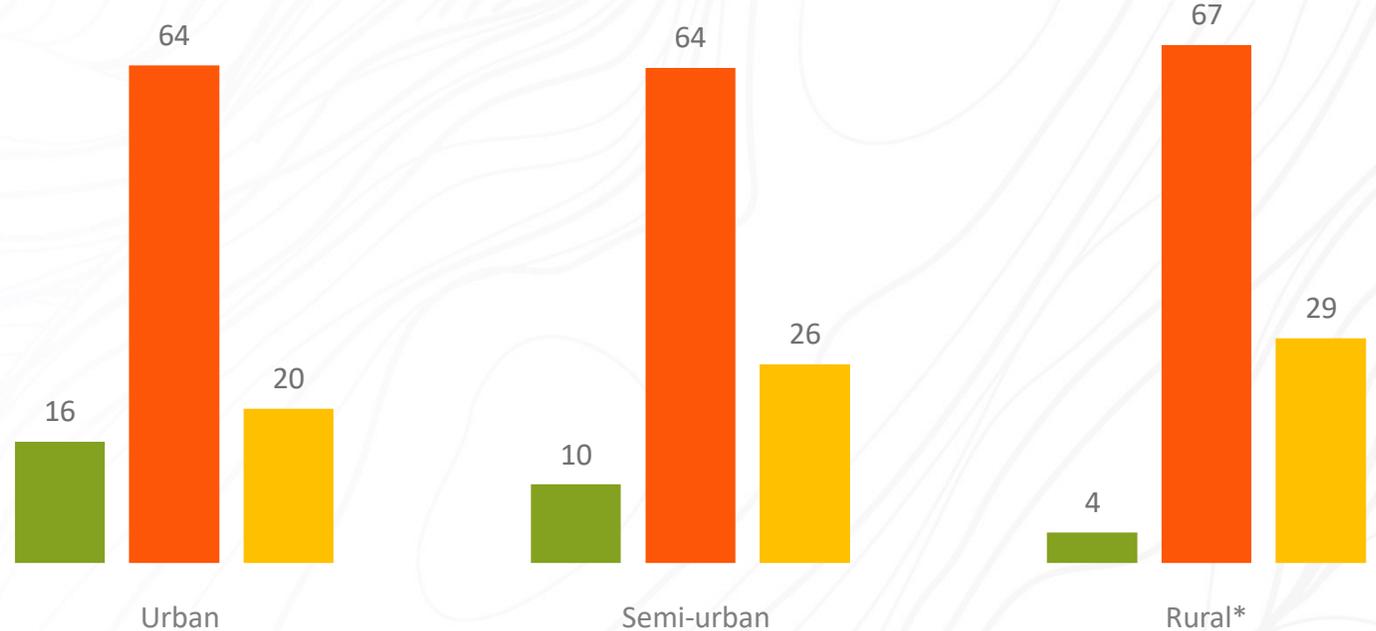
Frequency of travel (%)

Pre-pandemic compared to during the pandemic



■ More often ■ Less often ■ About the same

Frequency among segments (%)



* Cautious – low base size

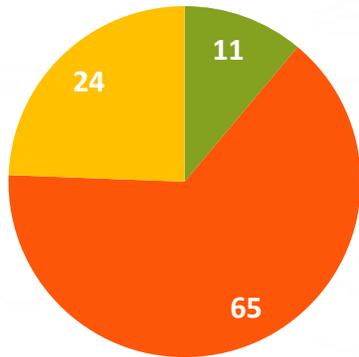
The pattern for current commuter and leisure travellers is virtually identical, with two thirds of both having reduced their bus use

Scotland



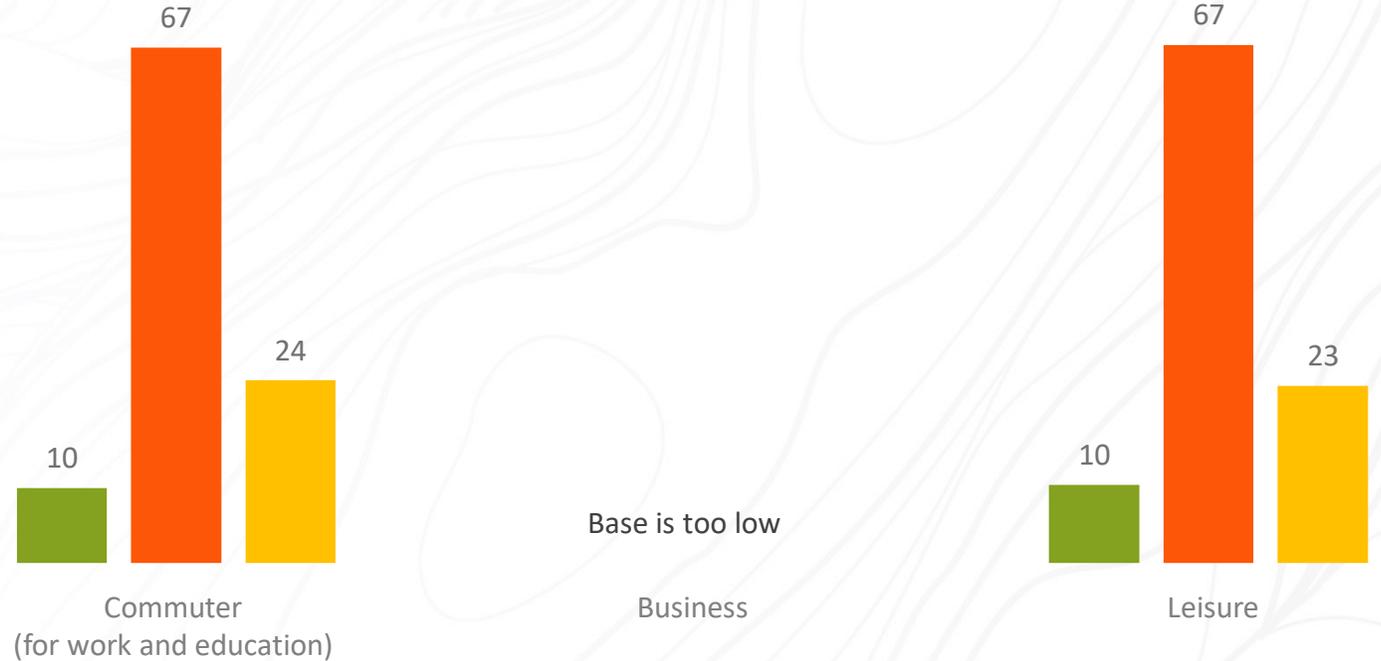
Frequency of travel (%)

Pre-pandemic compared to during the pandemic



■ More often ■ Less often ■ About the same

Frequency among segments (%)

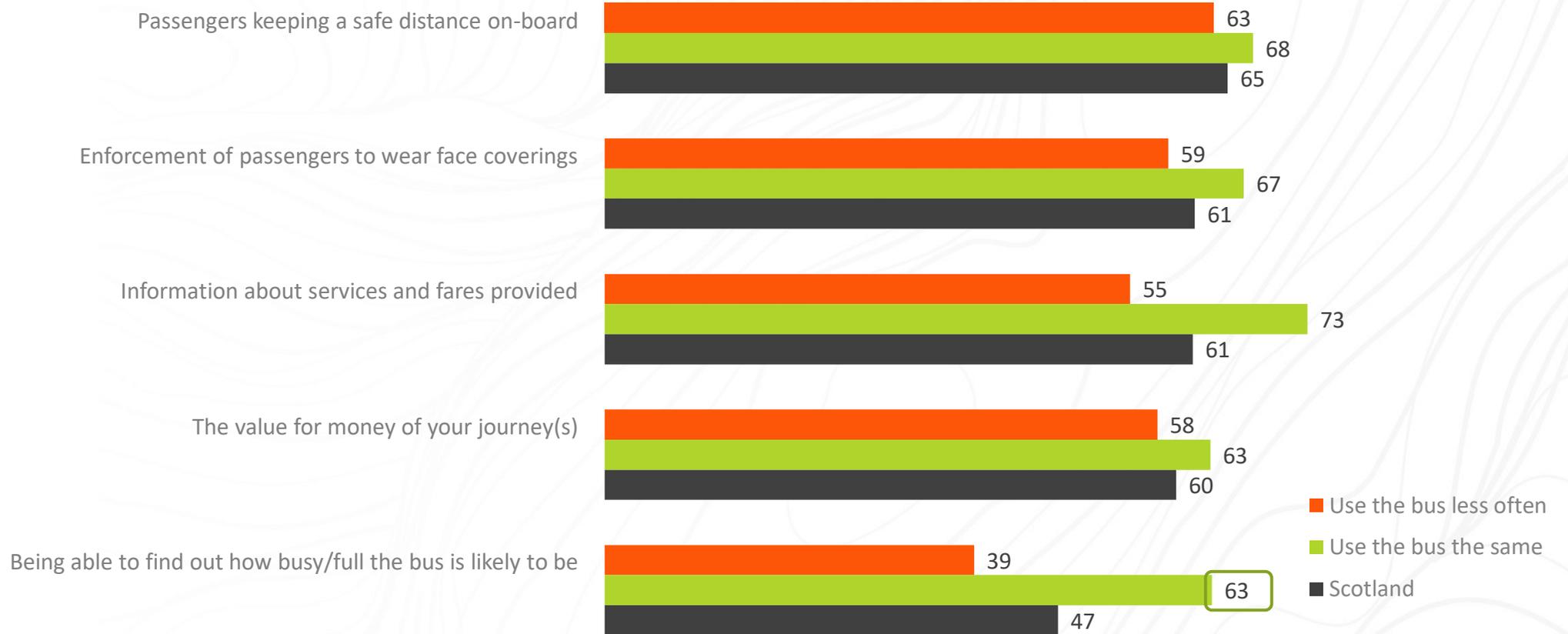


Those using the bus less often are less satisfied with information provision on how busy/full the buses are

Scotland



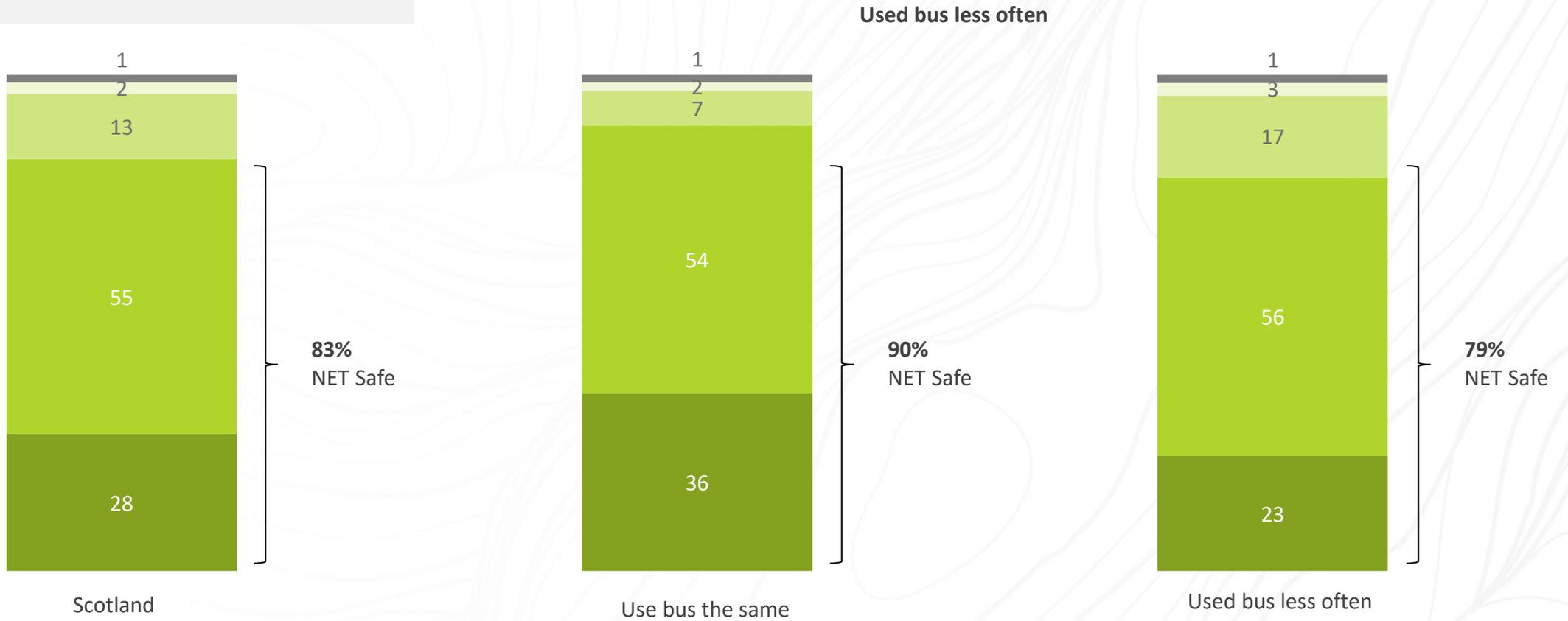
Satisfaction ratings (% NET satisfied)



Those using the bus less often were less likely to have felt safe making their journeys than those using the bus as often as they did before March 2020

How safe users felt (%)

■ Very safe
 ■ Fairly safe
 ■ Not very safe
 ■ Not at all safe
 ■ Don't know/ can't remember

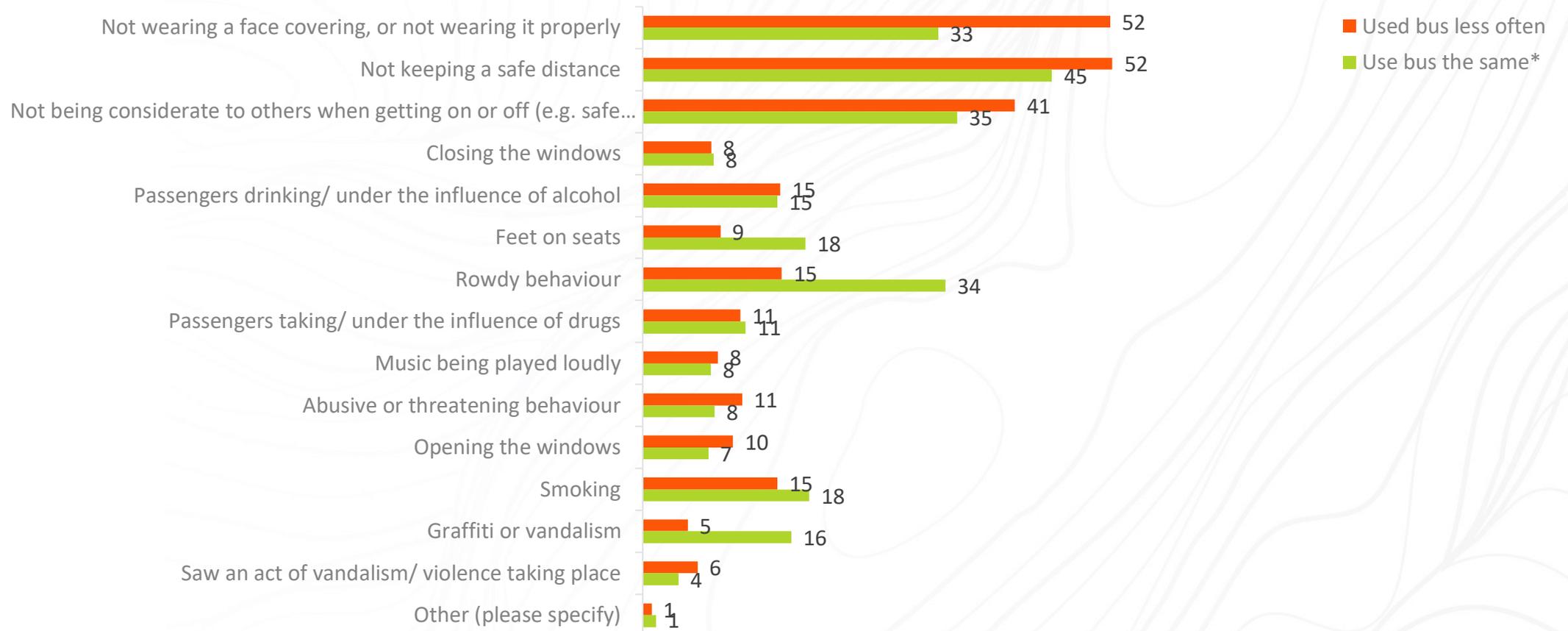


COVID-19 specific reasons are largely the reason for feeling worried at the bus stop among those who have reduced their use of the bus

Scotland



At the bus stop (%)



* Cautious – low base size

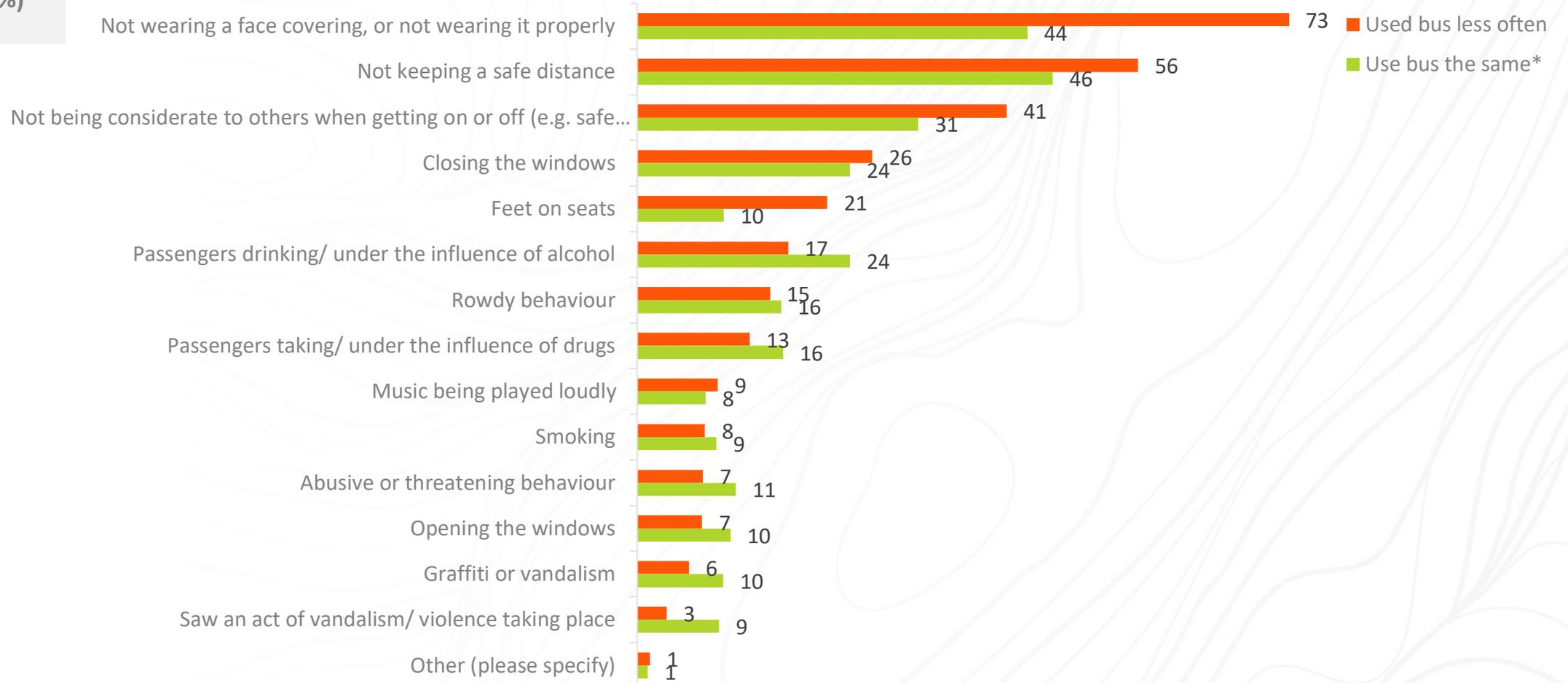
Q2_12. Which of the following were reason(s) for this? Base = 160, use the bus less often n = 108, use the bus as normal n = 52

This is a similar story when on the bus where 73% of those who have reduced their usage and felt concerned selected non-wearing of face coverings as a cause for this concern

Scotland



On the bus (%)



* Cautious – low base size

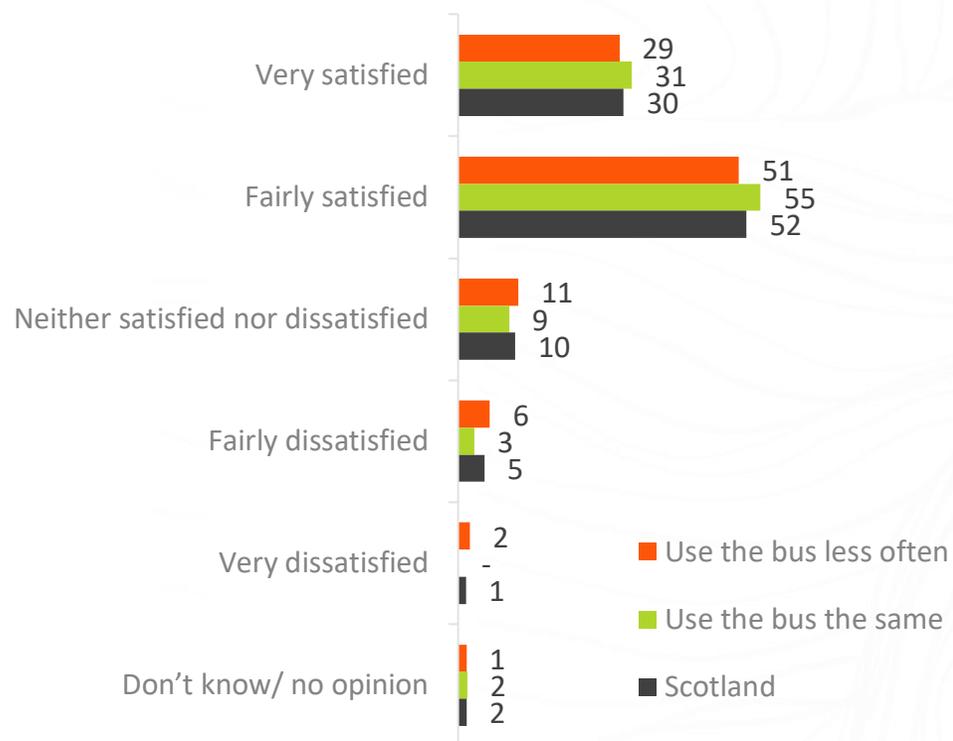
Q2_12. Which of the following were reason(s) for this? Base = 204, use the bus less often n = 143, use the bus as normal n = 61

Overall, those who were using the bus less often were satisfied with their journeys, but not quite to the same extent as those who had kept their bus use the same

Scotland



Satisfaction with bus journey (%)



Sometimes felt the driver could have enforced the wearing off masks by commuters



More certainty on when the bus will arrive, and whether or not said bus is at full capacity



Maybe have some seats taped off i.e. Not to be used. On my journeys all of the seats were available for use.



Restriction of the use of upstairs as people are not observed and do not always follow rules



Windows weren't always open and not everyone wore masks correctly i.e. over the nose and mouth.



Nobody allowed on bus without a mask . Also nobody allowed to sit within 2 rows of anyone else they are not traveling with.

Non-users and lapsed users

– reasons for not travelling by bus and future usage

Fully lapsed and non-users are generally not very relaxed about taking the bus currently

Scotland



How relaxed are non current users about taking the bus now (%)

Net Relaxed (Relaxed - Anxious)

Fully lapsed Users

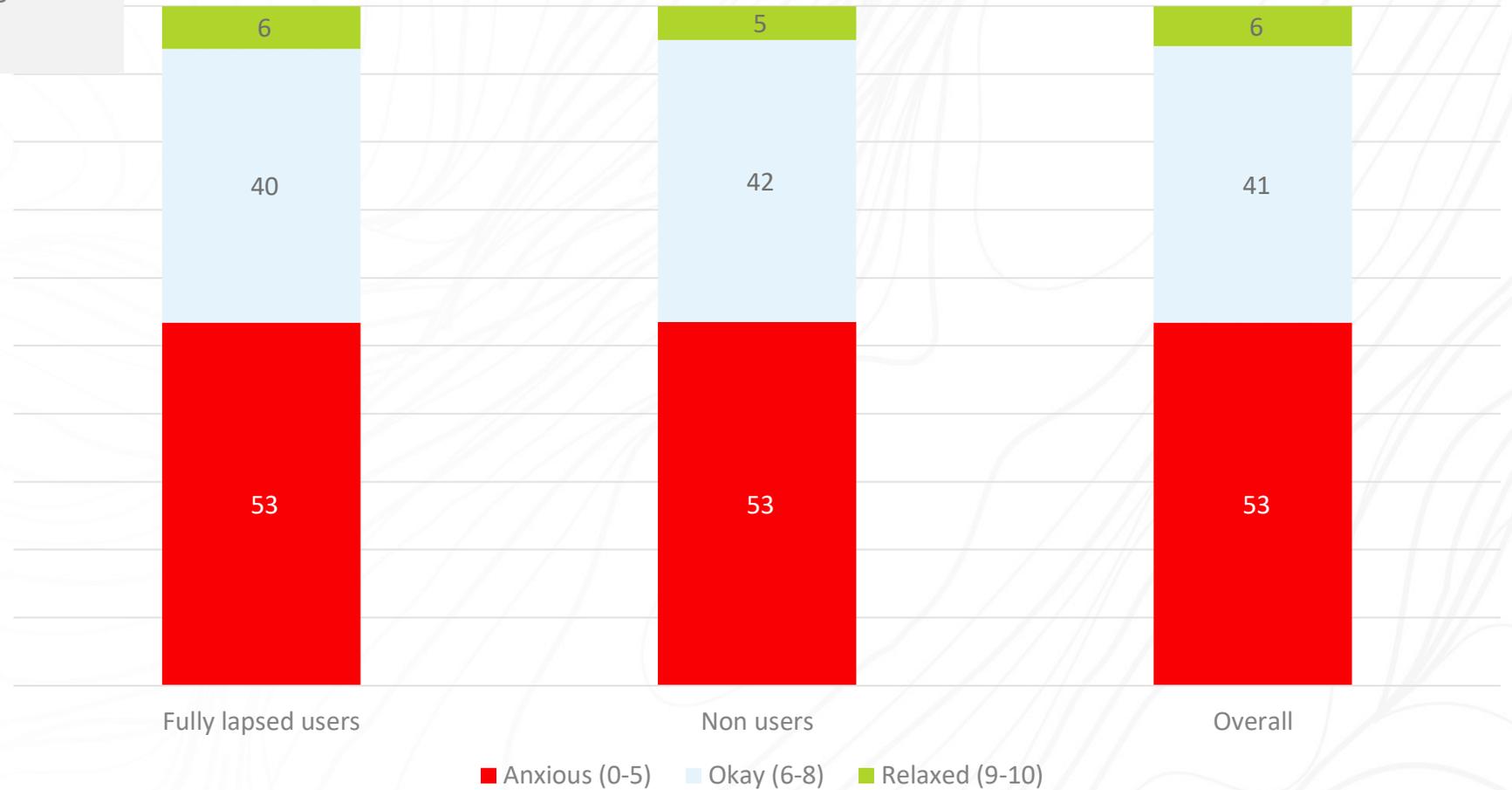


-47

Non User

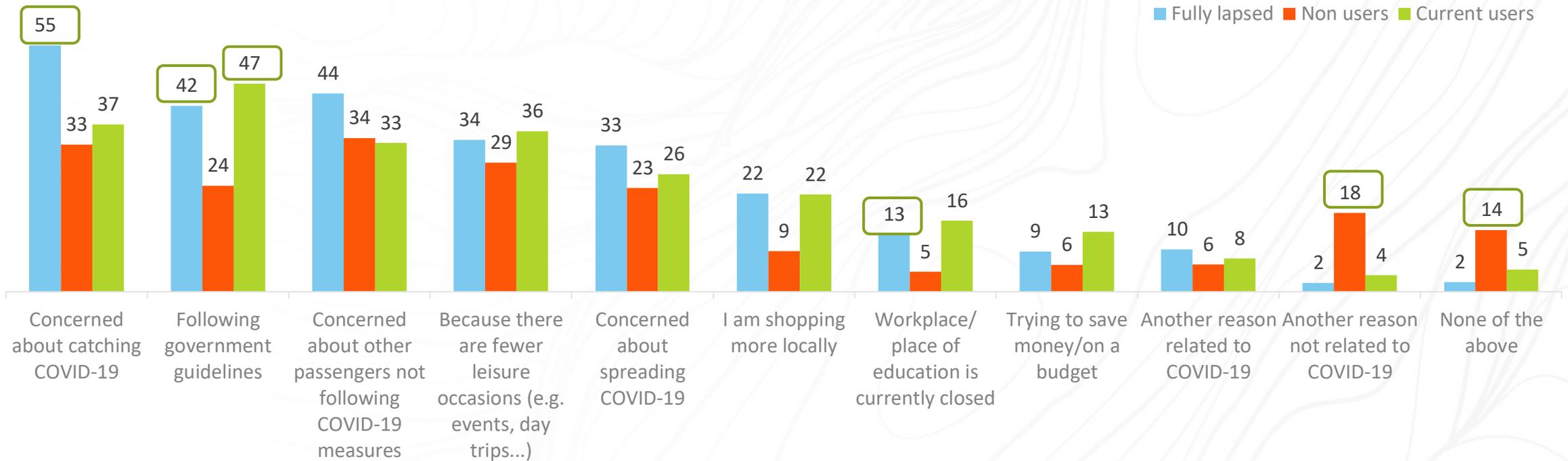


-49



For fully lapsed passengers, the reasons for not using the bus any more are mainly due to concerns around catching COVID-19 and following the government guidelines, 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

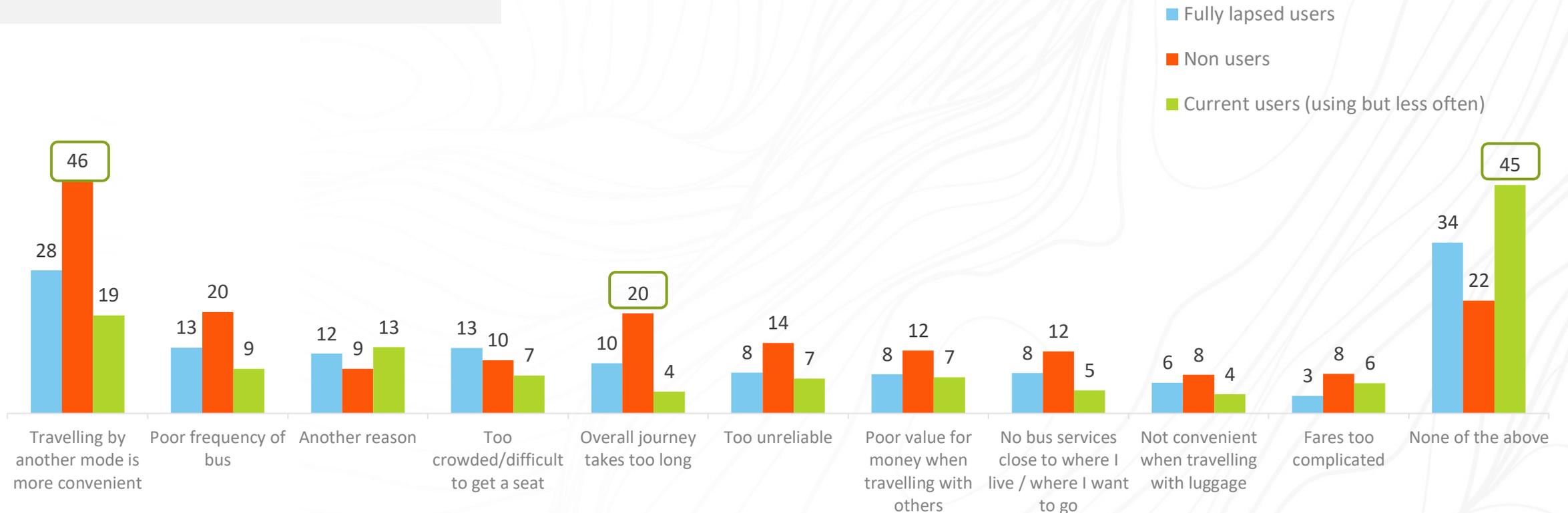


In fact, non-users are significantly more likely to say another mode of transport is more convenient, as well as the overall journey taking too long

Scotland



Reasons for reducing or not using the bus since March 2020



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

Scotland



How relaxed are non current users about taking the bus post COVID-19 (%)

Net Relaxed (Relaxed - Anxious)

Fully lapsed Users

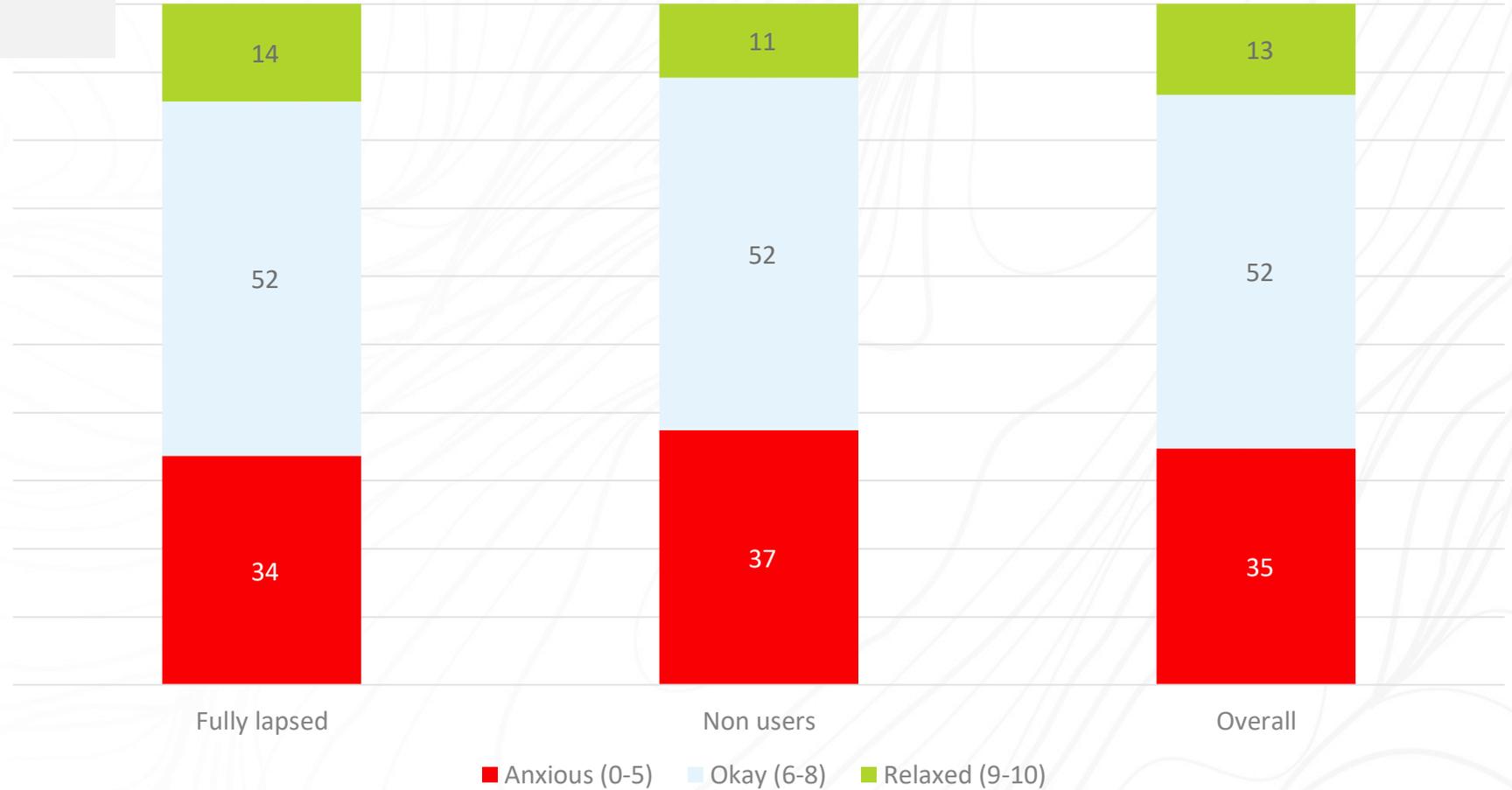


-19 (vs. -47 currently)

Non User

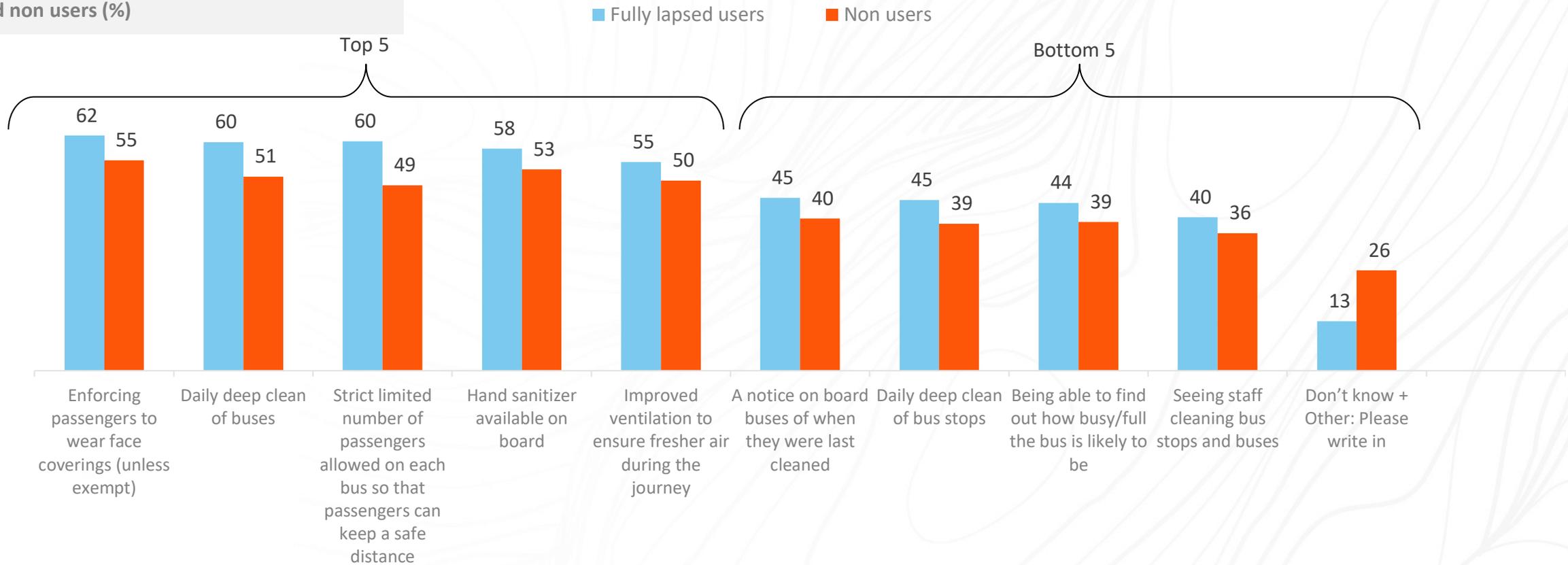


-27 (vs. -49 currently)

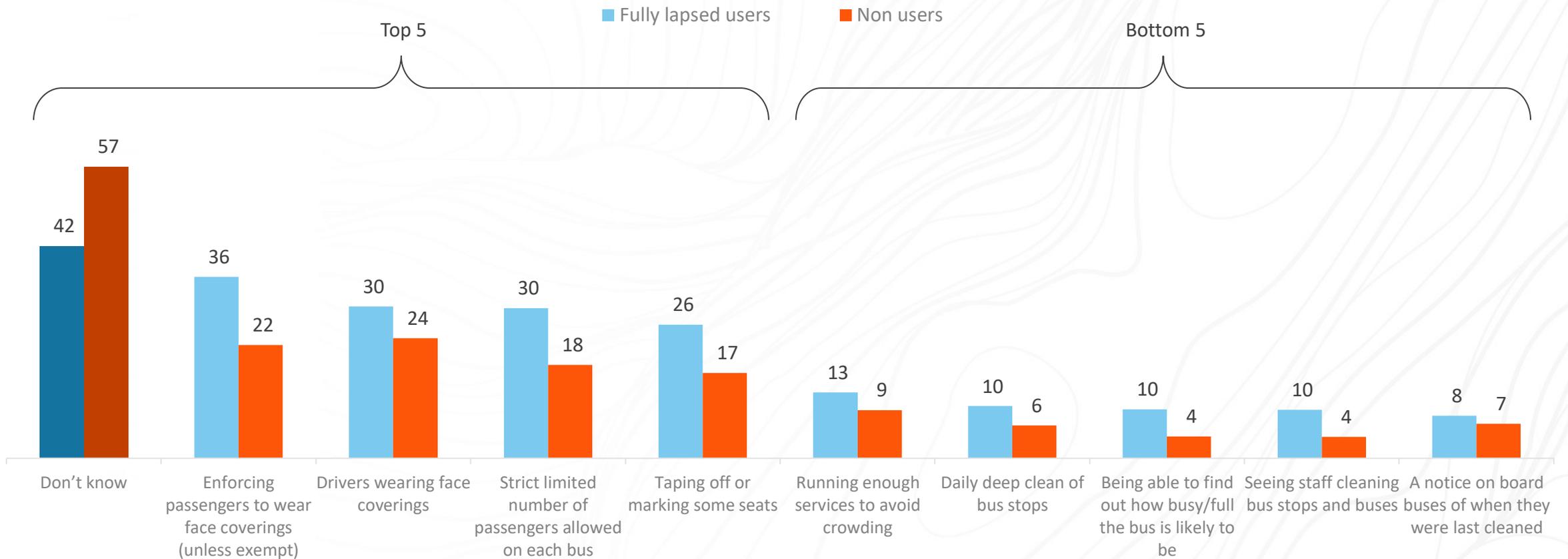


While COVID-19 is still present, measures in place to minimise the spread, such as mask wearing enforcement, sanitiser and deep cleaning are what these two user groups would most like to see

COVID-19 measures wanted by fully lapsed and non users (%)

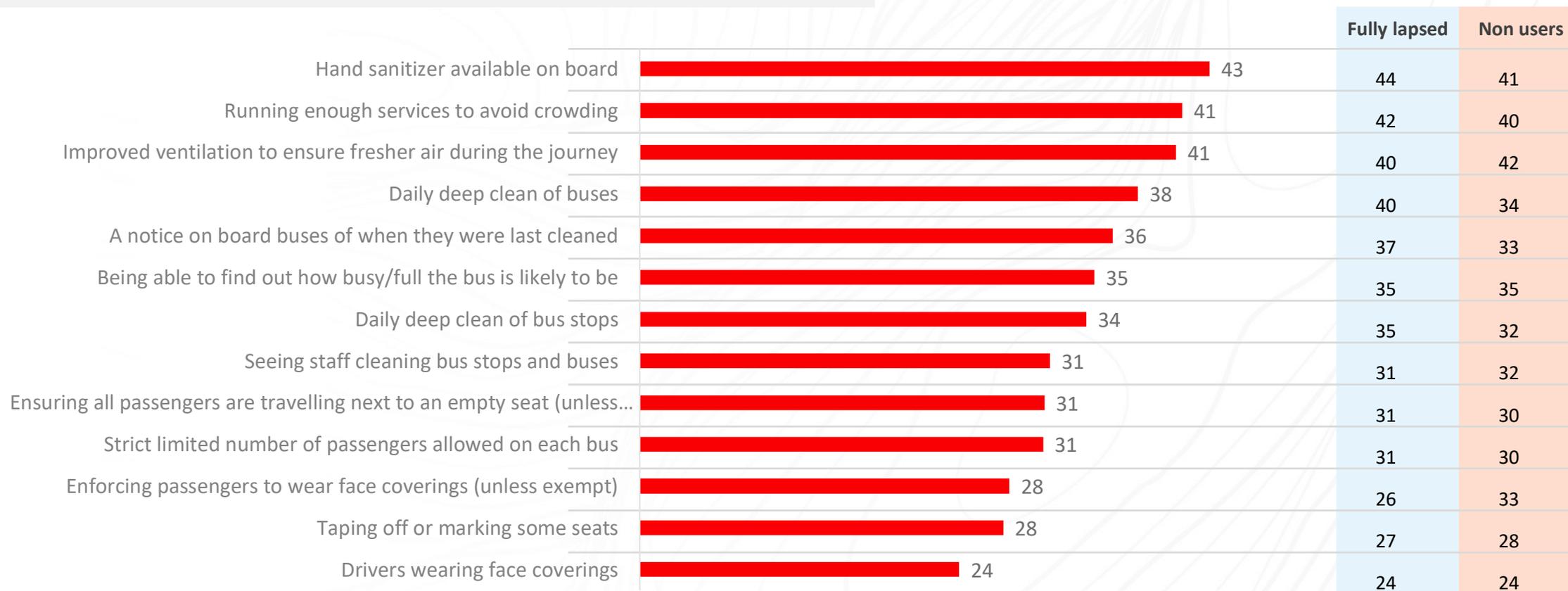


A better understanding of what is already in place on the buses is needed, as over half of non-users are unaware of the measures that have been implemented



The 'need gap' shows that crowd control, sanitising and ventilation are 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)



Priorities for increased bus use

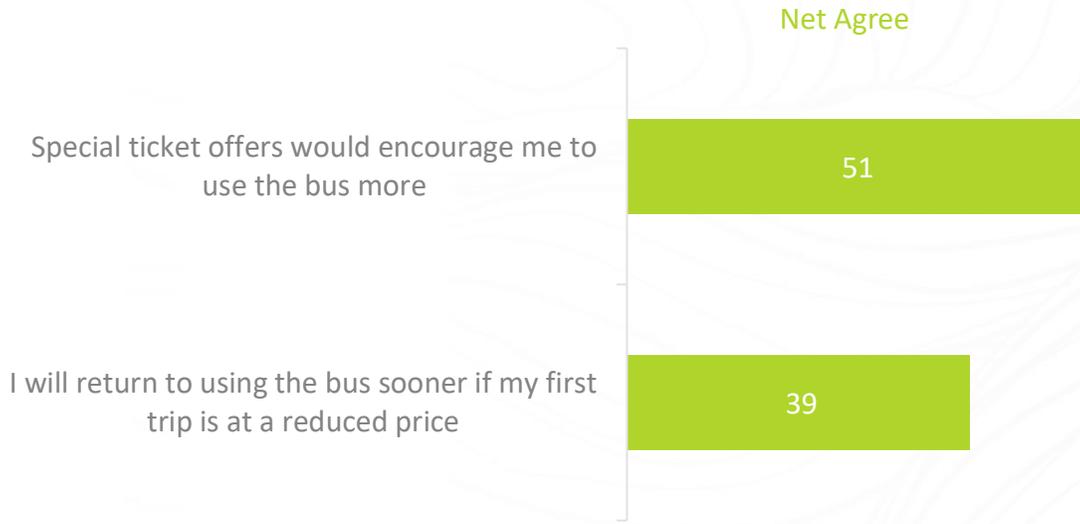
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Half of lapsed users agree that special offers will encourage them to use the bus more than now

Ticket statement agreement amongst lapsed users (%)



The easing of the COVID-19 measures on buses will result in considerably greater discomfort amongst current and lapsed passengers...

Scotland



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

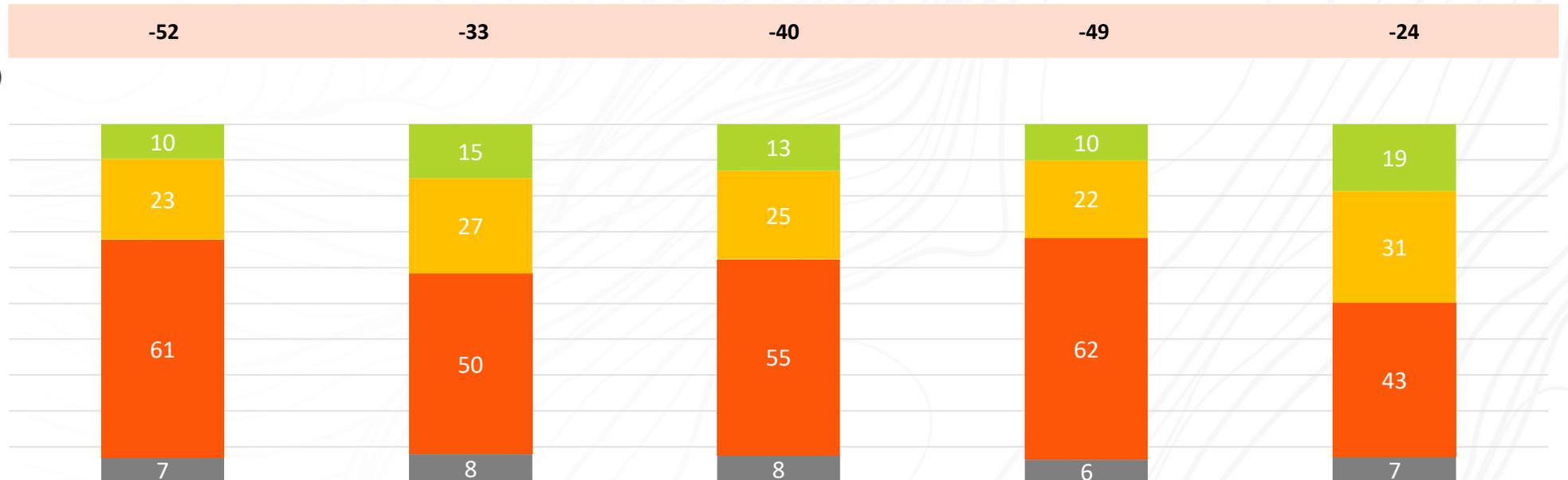
NET comfort change
(% who feel more comfortable minus % who feel less comfortable)

Feel more comfortable

Make no difference

Feel less comfortable

Don't know



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

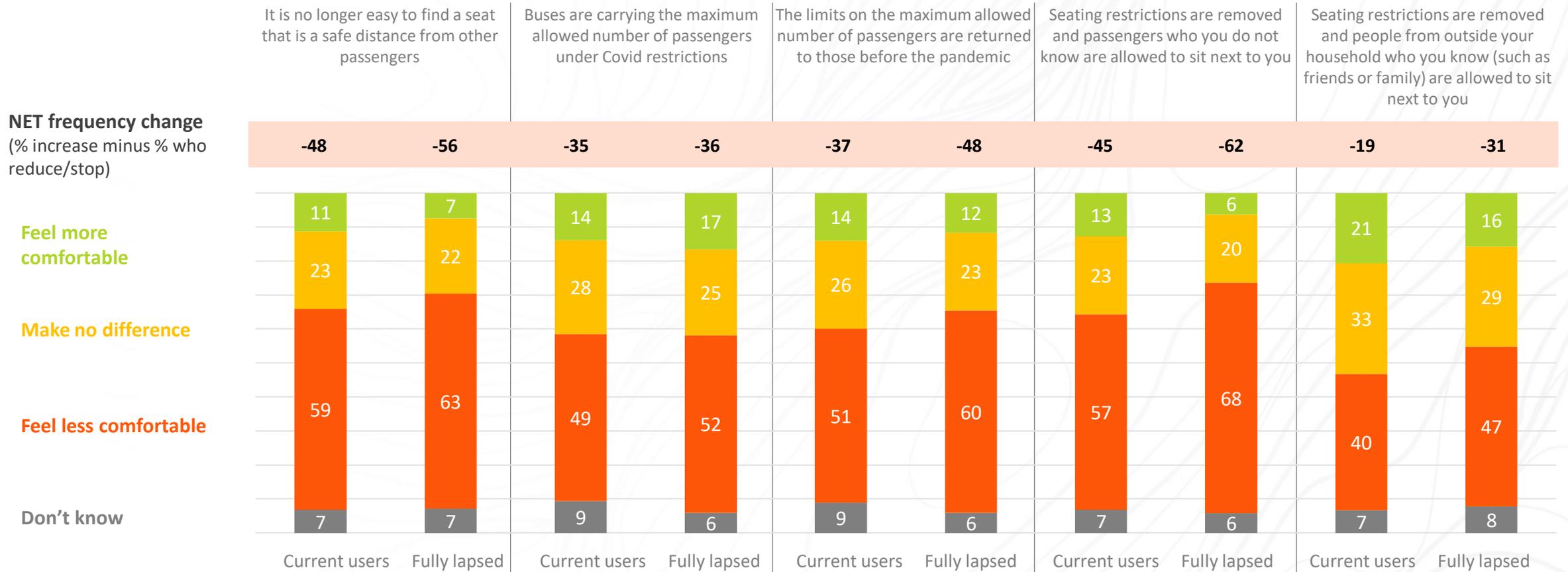
Seating restrictions are removed and people from outside your household who you know (such as friends or family) are allowed to sit next to you

With lapsed passengers generally feeling less comfortable than current ones, especially with the idea of other passengers sitting next to them

Scotland



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



And it is not only discomfort, these measures also have the potential to lead to both current users and fully lapsed to use the bus less often

Impact on frequency levels amongst users (%)



Across the segments, the most likely to reduce their bus use are the Cautious Car Choosers and the Anxious and Affected

Scotland



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



Rethinking Reducers



Spring-Back Socialisers



Anxious and Affected



Cautious Car Choosers



Carefree and Carrying on

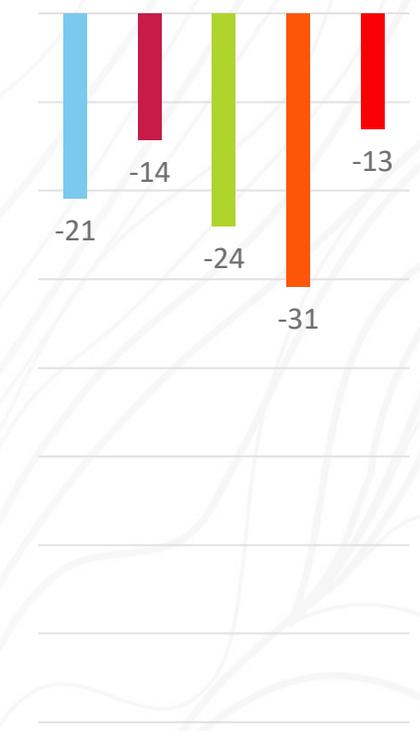
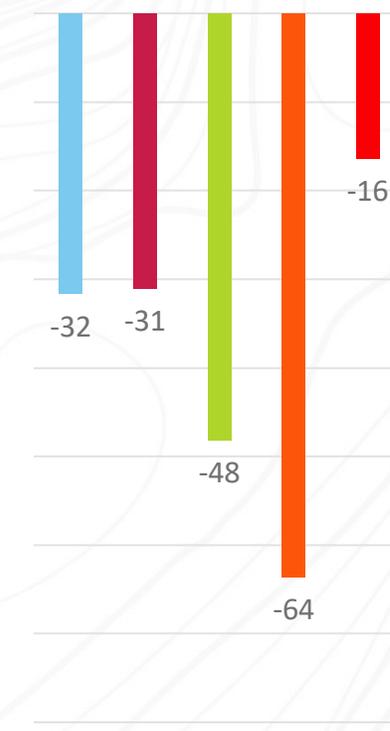
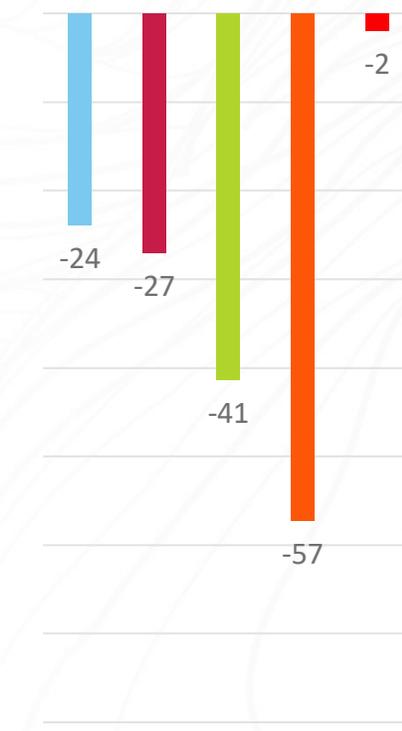
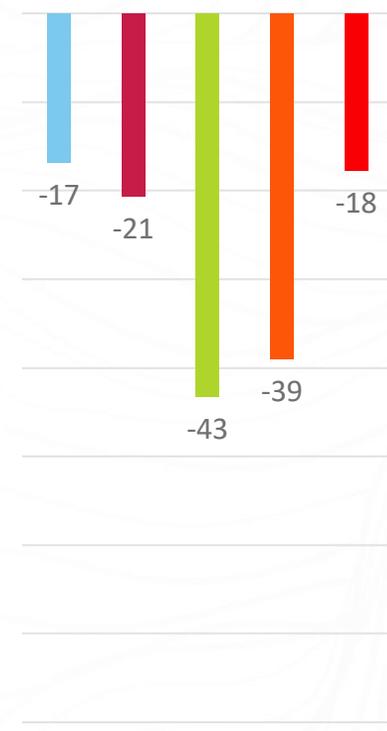
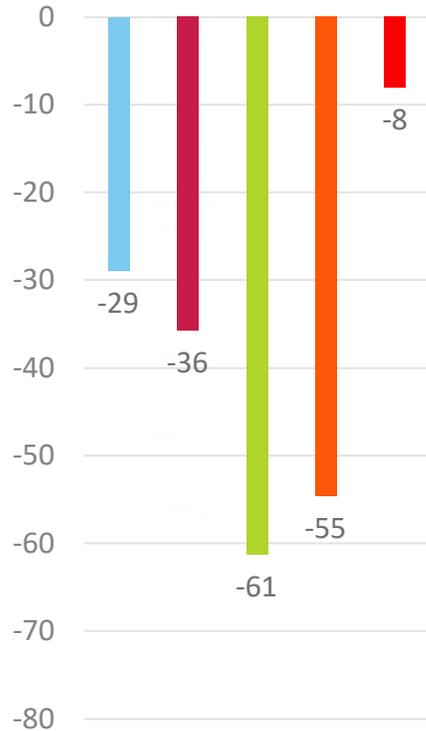
It is no longer easy to find a seat that is a safe distance from other passengers

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



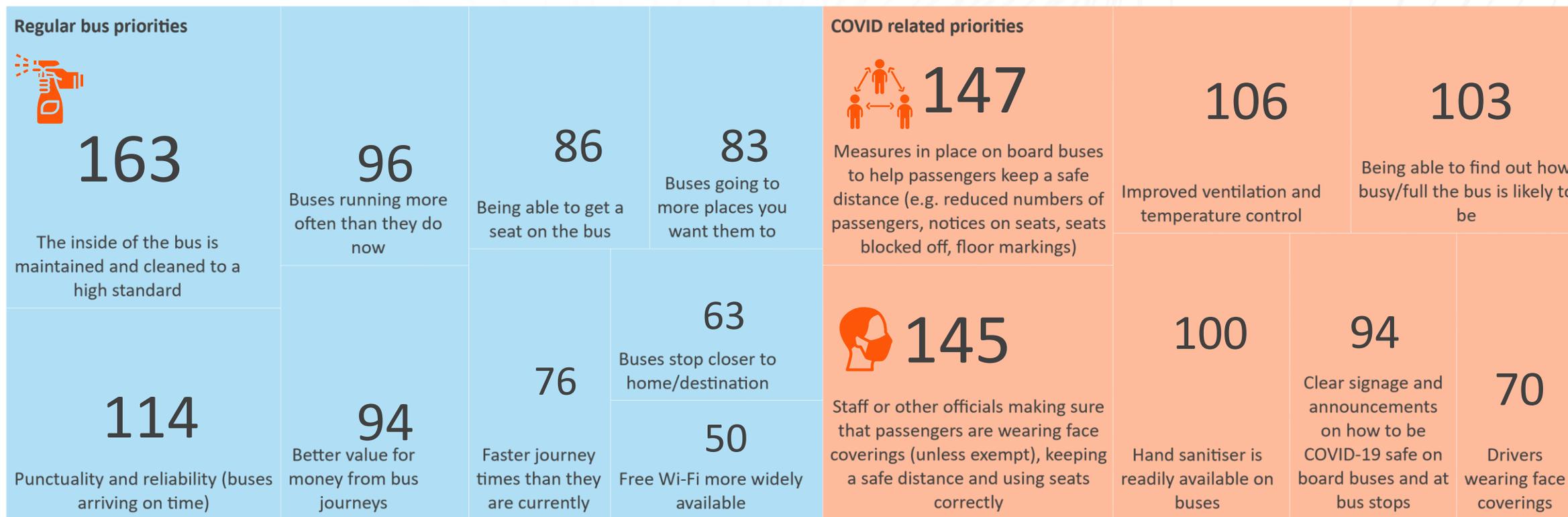
At an overall level, what is most important for increasing bus use is to ensure buses are clean, measures are in place to ensure safe distancing and enforcement is in place to make sure passengers are wearing face coverings

Scotland



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



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

MaxDiff



Scotland



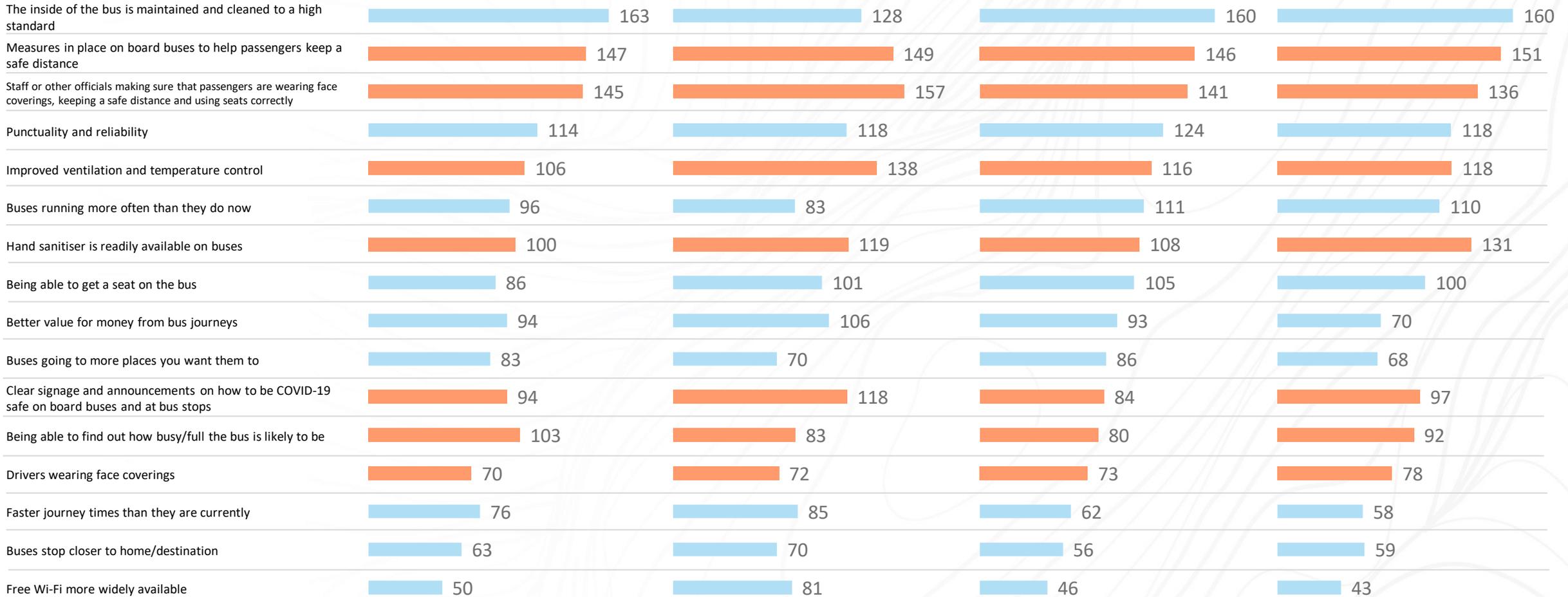
London



England (excl. London)



Wales

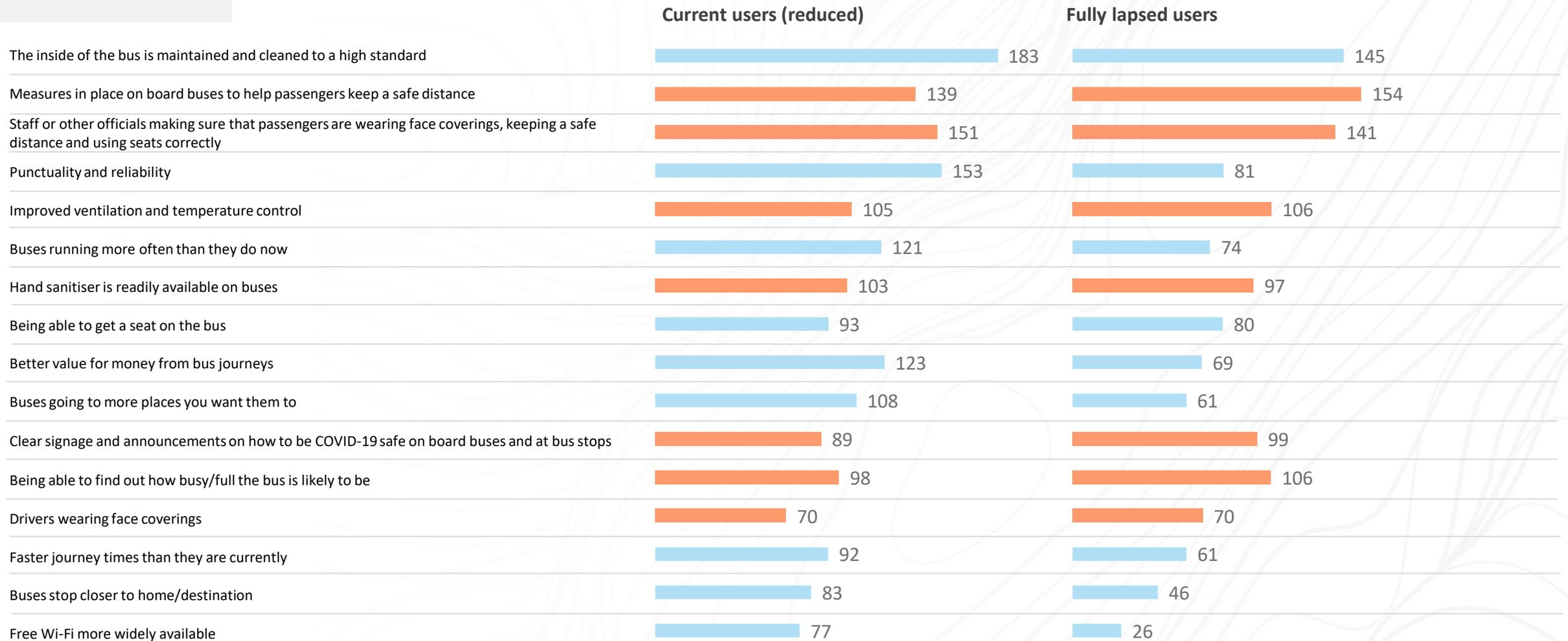


For current users, although COVID-19 measures are important, ensuring punctuality and reliability of buses is crucial to ensure higher use

Scotland



MaxDiff



Across the segments, the Cautious Car Choosers and Carefree and Carrying on are the hardest to convince while it will be easier to increase the use of the others

MaxDiff	 Scotland	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	163	99	111	195	193	170
Measures in place on board buses to help passengers keep a safe distance	147	96	128	174	158	152
Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly	145	86	118	195	147	144
Punctuality and reliability	114	108	46	115	159	112
Improved ventilation and temperature control	106	70	94	120	119	101
Buses running more often than they do now	96	126	52	119	86	94
Hand sanitiser is readily available on buses	100	67	90	115	96	126
Being able to get a seat on the bus	86	114	78	73	109	39
Better value for money from bus journeys	94	132	65	107	73	114
Buses going to more places you want them to	83	112	30	94	105	43
Clear signage and announcements on how to be COVID-19 safe on board buses and at bus stops	94	64	82	99	111	96
Being able to find out how busy/full the bus is likely to be	103	82	96	116	100	112
Drivers wearing face coverings	70	48	74	74	72	77
Faster journey times than they are currently	76	118	49	47	106	55
Buses stop closer to home/destination	63	101	36	53	61	83
Free Wi-Fi more widely available	50	80	12	51	52	61

* Cautious – low base size

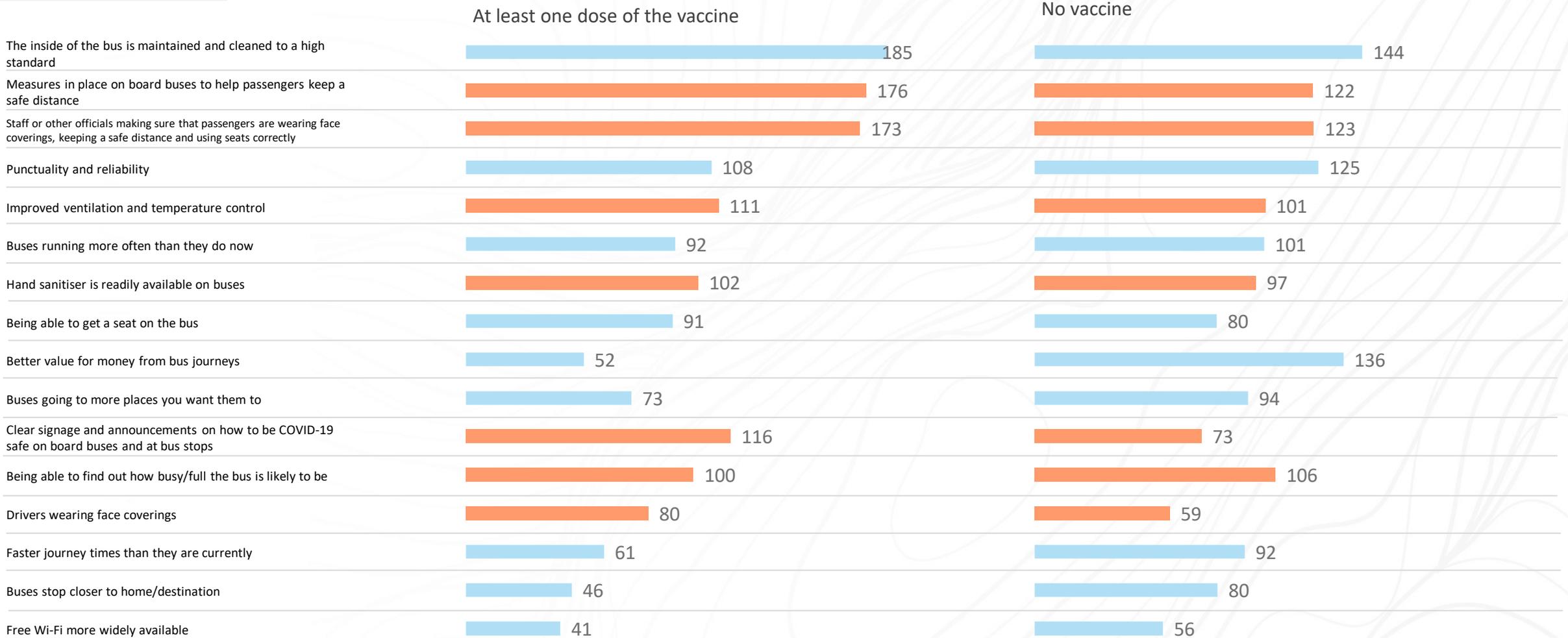
Base Carefree and Carrying on n= 97, Cautious Car Choosers n= 113, Anxious and Affected n= 157, Spring-Back Socialisers n= 156, Rethinking Reducers n= 79

Interestingly, COVID-19 measures are more important to those who have had the vaccine than those who have not, but age will be a key factor in this, as indicated by the higher importance placed by those not vaccinated upon value for money

Scotland



MaxDiff



How to best reach user segments

transportfocus 

 BVA BDRC

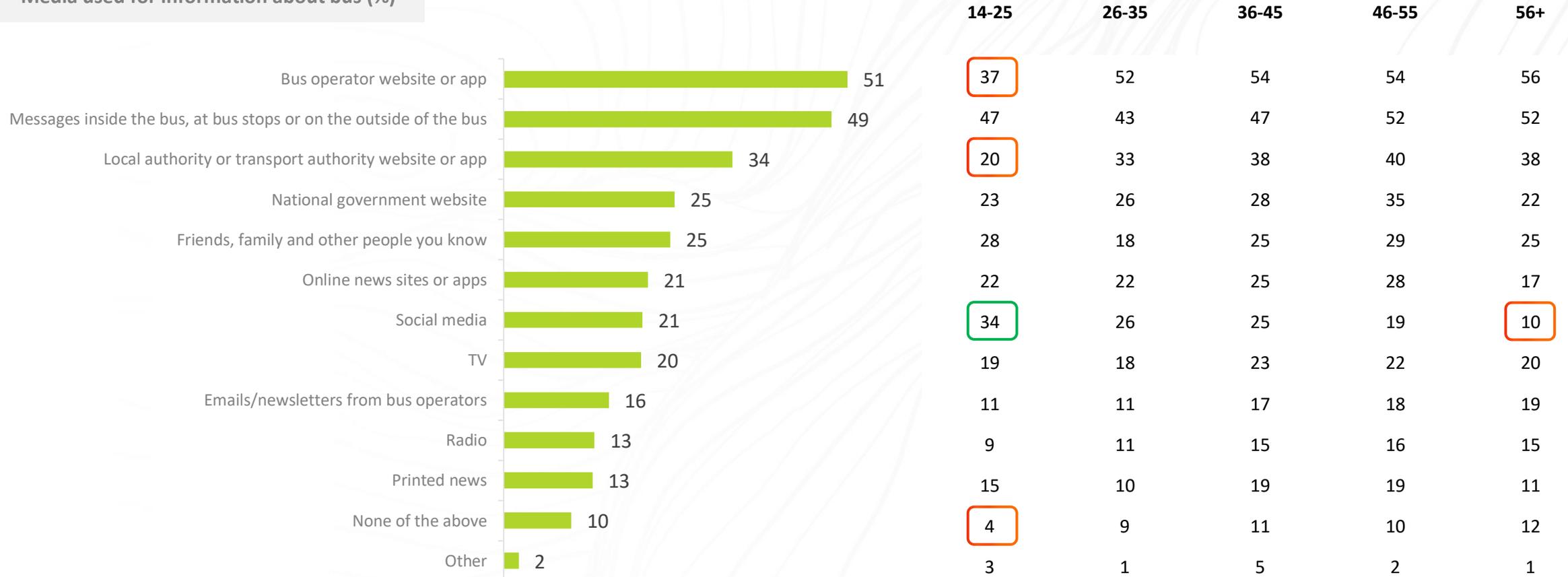


Apps, posters and websites from the bus operators are key media sources for all age groups

Scotland



Media used for information about bus (%)

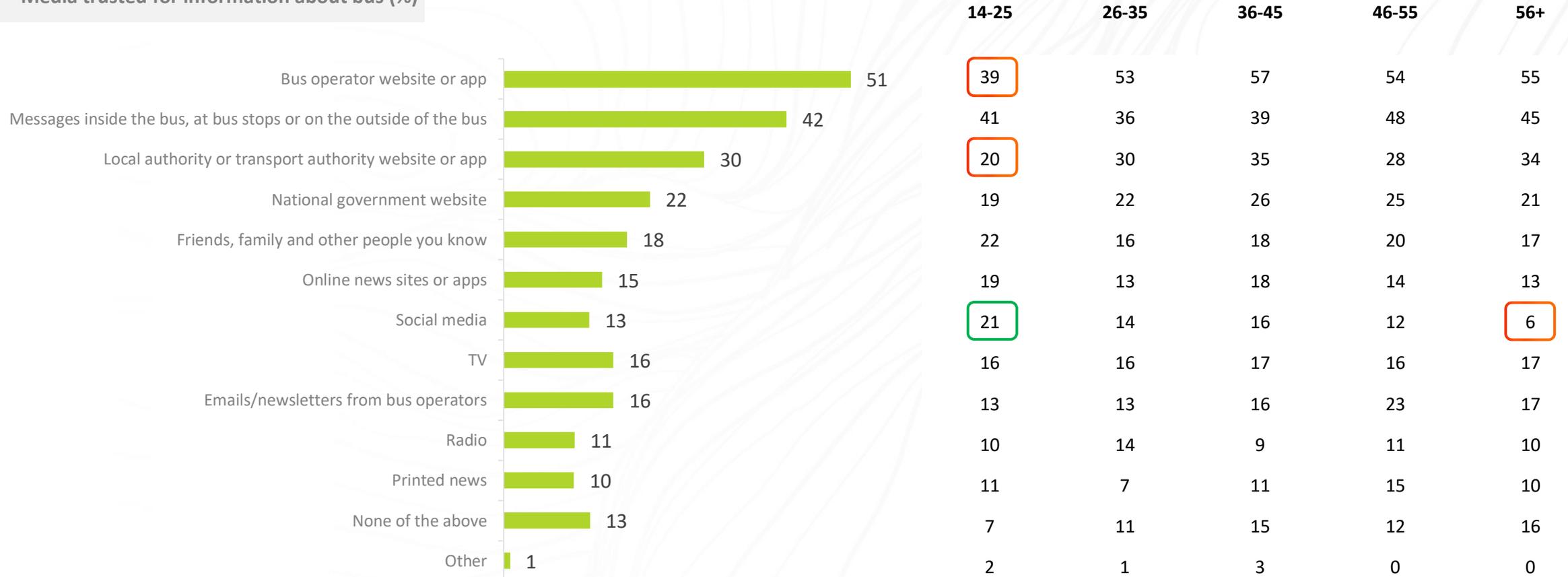


Though younger passengers are generally less likely to trust in these forms of media relative to other passengers

Scotland



Media trusted for information about bus (%)



Appendix

transportfocus 

 BVA BDRC



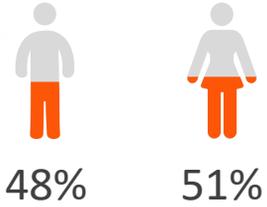
Scotland demographics

Scotland

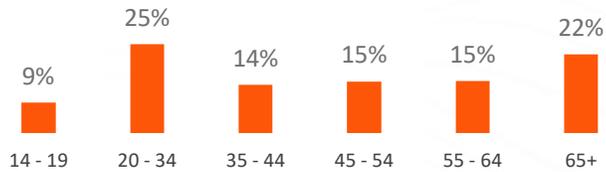


Overall figures

Gender



Age



Disability



GB nations



London
10%



Scotland
9%



England (excl. London)
77%



Wales
5%

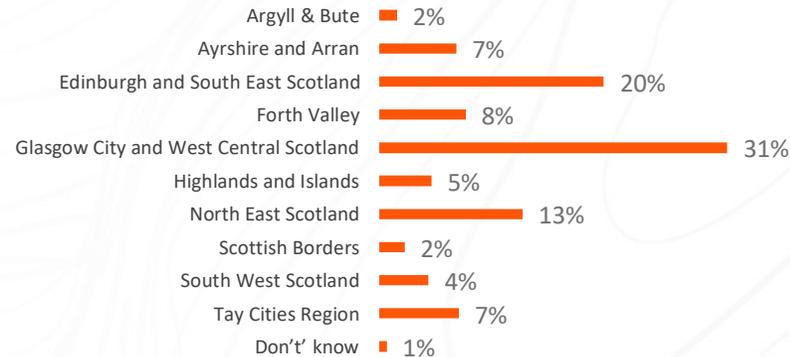
Scotland area types

Urban
32%

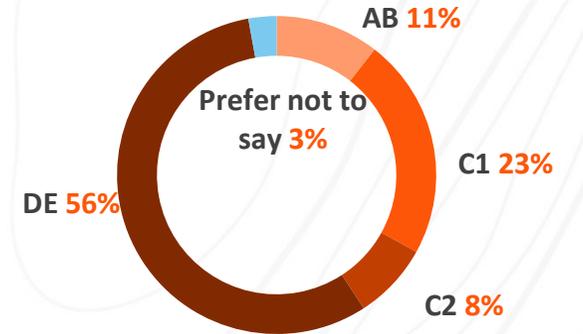
Semi-urban
47%

Rural
21%

Scotland regions



Social Grade



Had the vaccine



Contacts

transportfocus 

 BVA BDRC



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