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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 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 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
7	significant difference; orange
J	refers to a negative significant
	difference





Key summary (1)

Bus usage incidence

Around half of those open to using buses across Britain, aged 14 or over, have used the bus since the start of restrictions in March 2020. In London this incidence was considerably higher at two thirds, whereas in Wales it was a little over one third.

One of the factors behind this difference is that Wales has the highest proportion of those having access to a car, with well over half having access all the time (vs. 33% in London). As such, Wales has a higher share of fully lapsed and non users compared to the other nations.

The experience:

The vast majority (84%) of current users felt safe taking the bus during the pandemic, although this was less likely to be the case in London (70%). 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 London (where 26% said their buses were at least fairly busy and 65% said they were unable to board the first bus at some stage). This capacity factor was not only seen in the London, a similar picture emerged in other urban areas of England.

At an overall GB level, satisfaction with taking the bus during the pandemic was high at 81%. 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.

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 suggested most commonly for improving their journey experience.

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 (78%) and the lowest satisfaction for being able to find out how busy the bus is (42%).

Those dissatisfied with their journeys overall rated 3 key items much more poorly than those who were satisfied:

- How well the bus company looked after passengers in terms of COVID safety
- Being able to keep a safe distance when getting on and off
- Passengers keeping a safe distance on the bus





Key summary (2)

Evolution of bus travel

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, bus use has decreased since March 2020 (79% of users have reduced or stopped). These are most likely to be the Anxious and Affected and the Spring Back Socialisers.

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, 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 with nearly all fully lapsed users back on the bus.

The Anxious and Affected, the Cautious Car Choosers 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 (7%) have increased their bus use. This was primarily for commuting or food shopping journeys.

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 about 1 in 5 users (but were least likely to be Spring –Back Socialisers and Anxious and affected). Their reasons for planning more frequent trips is primarily for leisure purposes rather than commuting.

Threats

Of the total sample (all open to the idea of using buses) just shy of a third used the bus regularly before the pandemic, had stopped using the bus entirely since the introduction of restrictions in March 2020. These fully lapsed users are made up to a larger extent of Cautious Car Choosers and Rethinking Reducers compared to current users.

4 out of 5 bus passengers have used the bus less often since the first lockdown in March 2020, driven by the majority of segments, mainly from semi-urban and rural areas and predominantly leisure travellers.

Also, just under 60% of bus passengers (current or lapsed) used another transport mode for some of their bus journeys. These 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 nearly two thirds of those travelling less frequently were not satisfied with.
- While the majority felt safe during their journeys (83%) they less likely to do so than those who hadn't reduced their bus travel. Those least likely to have felt safe came from the more cautious segments (Anxious and Affected, Cautious Car Choosers and Rethinking Reducers).
- Although the overall level of concern about the behaviour of other passengers
 was no higher for those who have travelled less by bus, with 40% being worried
 at the bus stop and 55% on the bus, this was more likely to be driven by COVIDrelated reasons. Keeping a safe distance, face coverings and not being
 considerate when getting on or off, were their top reasons for feeling worried or
 uncomfortable and to a greater extent than those who hadn't reduced their bus
 travel.

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 the provision of information covers crowd control, but also sanitising and ventilation are high on the agenda for both. While enforcement of the rules is generally important, this is something people see a lot of information on and are aware of so communication of this is less pressing.

Rethinking the tickets options and offering discounts will help increase the bus use for about half of the **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.

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%

Fully Lapsed users – 26%

Non-users – 18%

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

Focusing on the rest of 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%

<u>Top 3 bus related reasons</u> 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 – Buses running more often than they do now – **125 117**

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%

Fully Lapsed users – 45%

Non-users – 24%

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

Focusing on the rest of 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 the rest of 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%

Fully Lapsed users – 34%

Non-users – 12%

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

Focusing on the rest of 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%

Fully Lapsed users – 42%

Non-users – 16%

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

Focusing on the rest of 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**

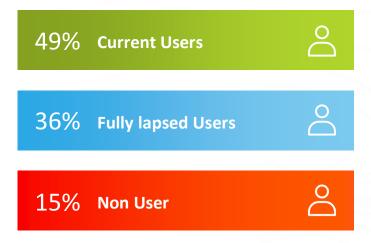






About half of all respondents to the survey used the bus during the first year of the COVID-19 pandemic. Bus use in London was the highest, and Wales was the nation with the lowest incidence rate



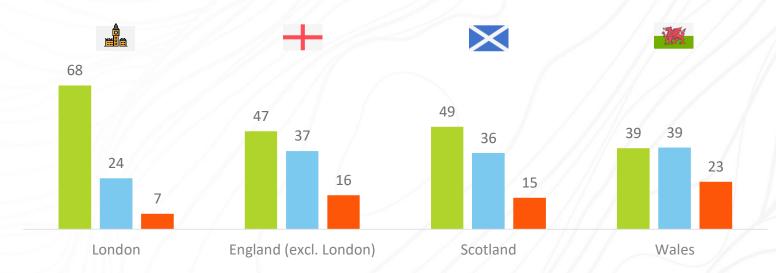


Any respondent who used the bus since the restrictions related to the COVID-19 pandemic started in March 2020

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

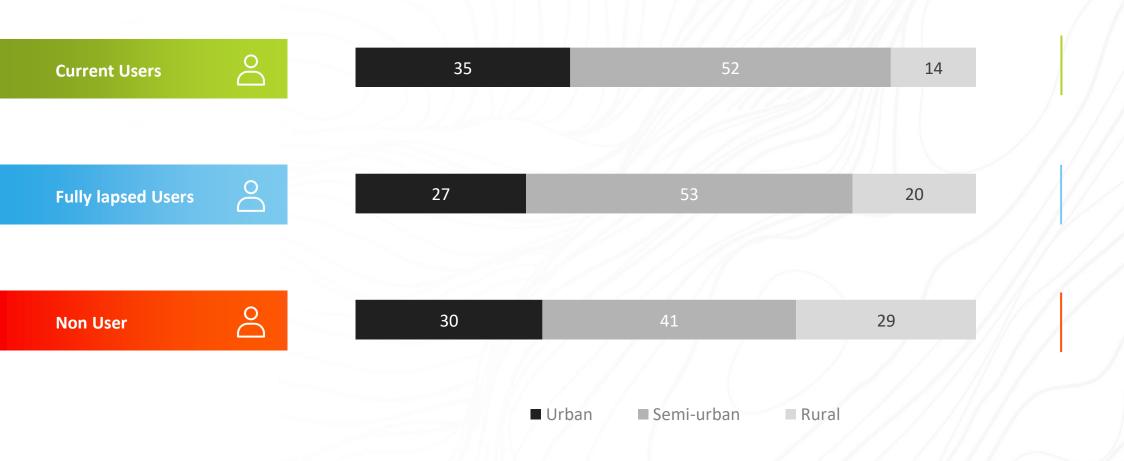






Across Great Britain, current passengers are more likely to be from urban areas than those who have stopped using buses since the beginning of the pandemic

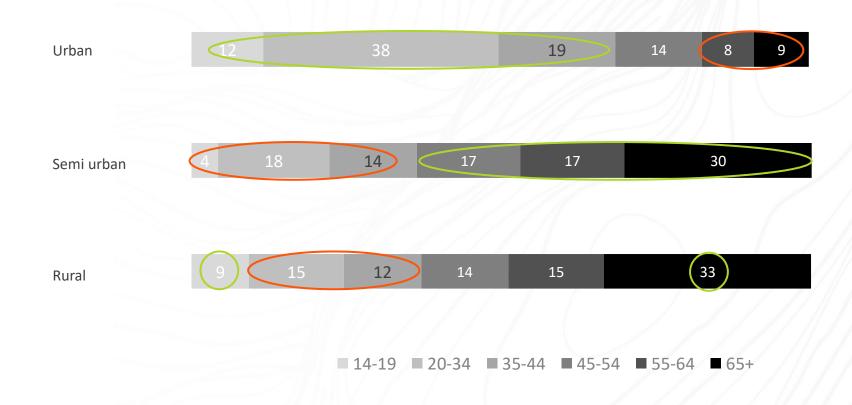






Age is a key factor in understanding differences across areas with older respondents more likely to be living in semi urban and rural areas







And yet, age is not a major factor in distinguishing each user type – although there are differences at the youngest and oldest ends of the age range across the three groups

England (excl. London)



Meet the Transport Focus travel segments



		Omnibus April results*	
Carefree and Carrying on	20	21	They are the least anxious about using public transport.
			Are more likely to own a car and alrea others to think that public transport is
Cautious Car Choosers	19	27	They are anxious about using all motransport in the future. They also say They are less likely than others to we have reopened
	20		Are more likely to be reliant on public to be using it as much in the future.
Anxious and Affected	20	16	Tend to feel more anxious than other to ensure safety on public transport.
Spring-Back Socialisers	29	27	Are more likely to be previous publi activities, which they are likely to do so
	29		They are less anxious than others abo safety on public transport.
Rethinking Reducers		9	///
Nethilikilig Reducers	11		Are more likely to have used public tra They are more likely to say that they more likely to be rethinking their future

Transport Focus

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**.





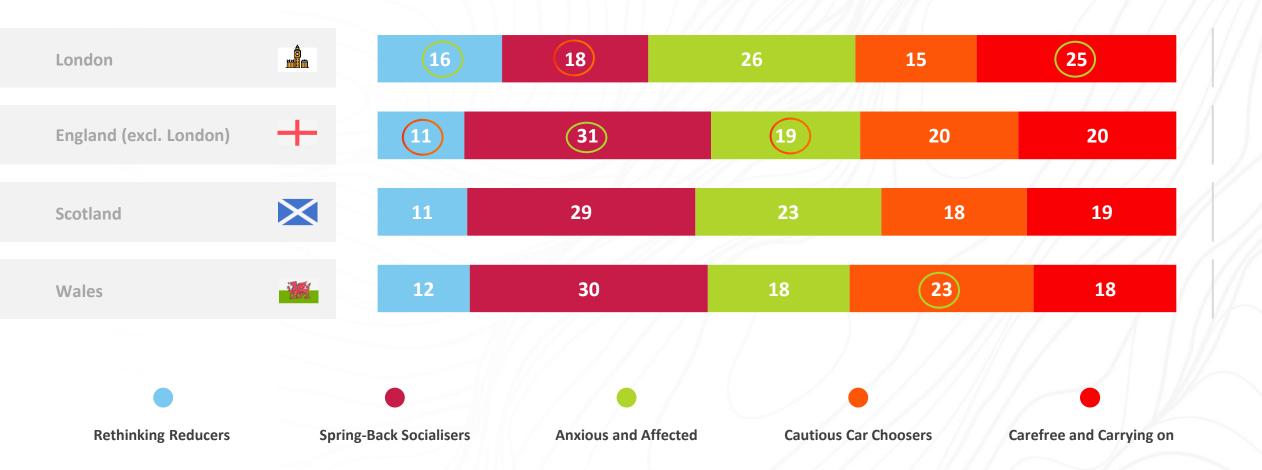
While current users are significantly less likely to be Rethinking Reducers and Cautious Car Choosers, these two segments are more prevalent in the fully lapsed user group





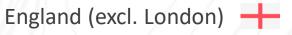
Because of its urban younger demographic, London records the highest proportion of Carefree and Carrying on. Wales, where access to a car was highest, had a significantly higher proportion of Cautious Car users

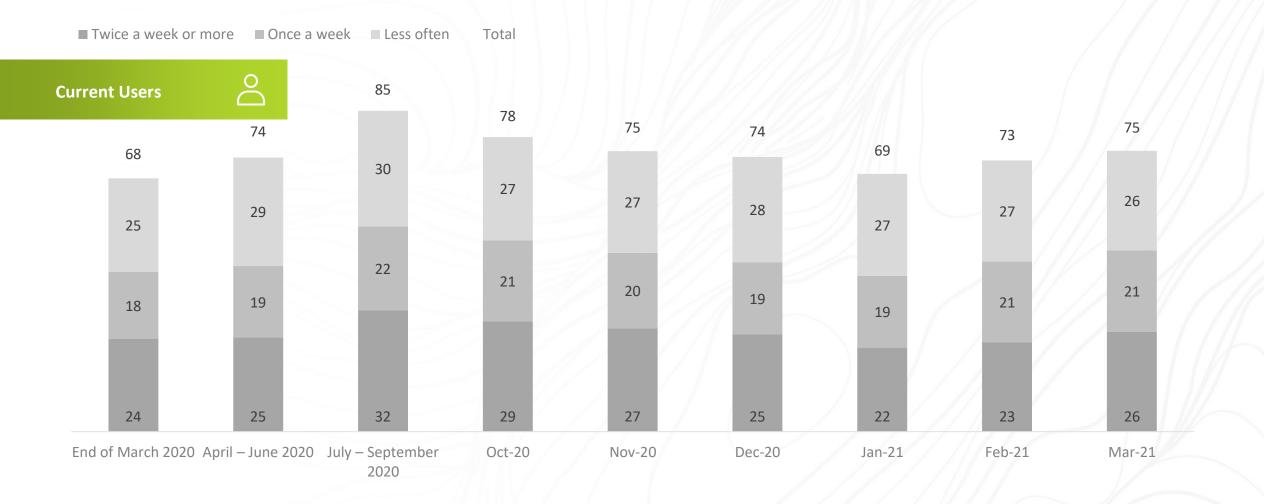






Bus use in England (outside London) picked up during the summer of 2020 with 85% of those who have used buses in the past year travelling during **July to September**



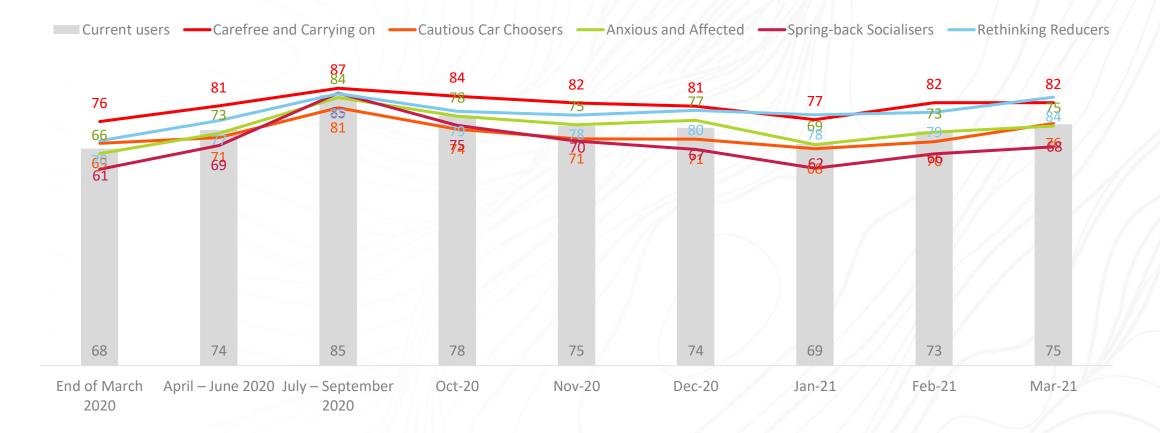


Spring Back Socialisers pushed the trend up more than others during July to September, but their levels of use dropped back the most afterwards

England (excl. London)



Current Users bus use (%)





But overall, the majority have decreased their frequency of bus use compared to before the COVID-19 crisis. Spring Back Socialisers, Anxious and Affected and leisure passengers are the groups most affected by a decline in bus use

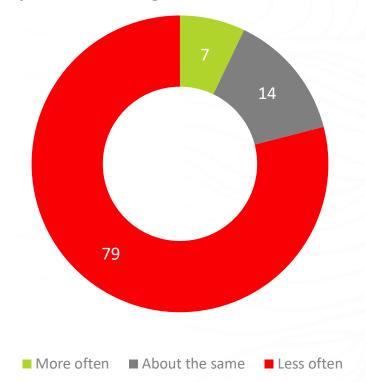


England (excl. London) – Current Users



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

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







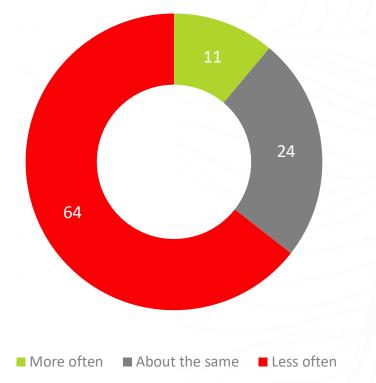


The biggest changes in frequency of bus use are for those who tend to travel during the period 09:30 to 14:59

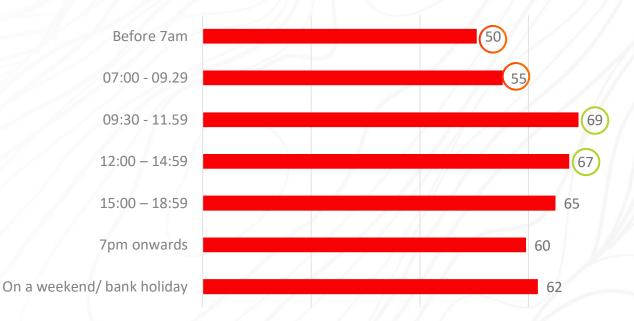
England (excl. London)



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



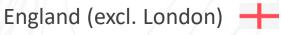
Less often by typical day/time of travel (%)



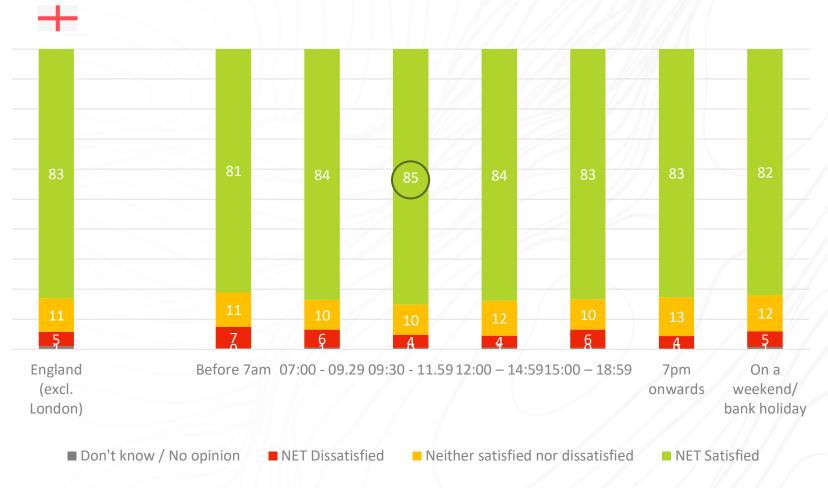




And for those who have travelled since March 2020, 9:30-11:59 proves to be the time period with the highest satisfaction



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

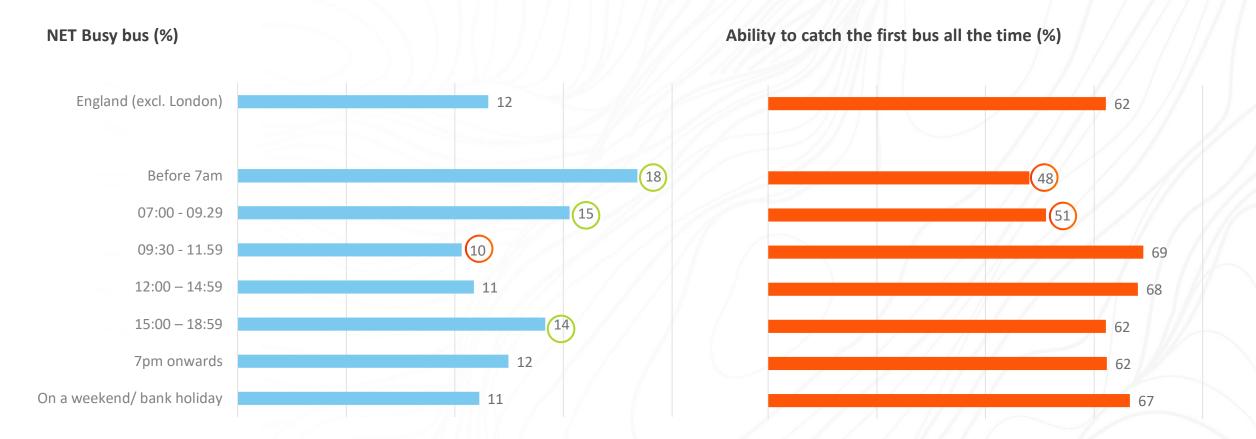






Those travelling during the earlier part of the day are significantly more likely to have a busy bus and are less able to catch the first bus every time

England (excl. London)

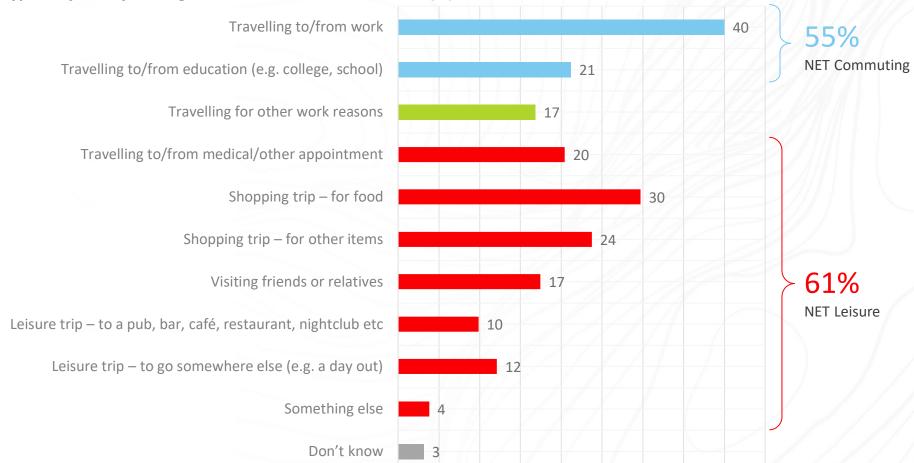


For the few who have increased their use of the bus, the first activity is to commute to and from work and secondly to go shopping for food

England (excl. London)



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

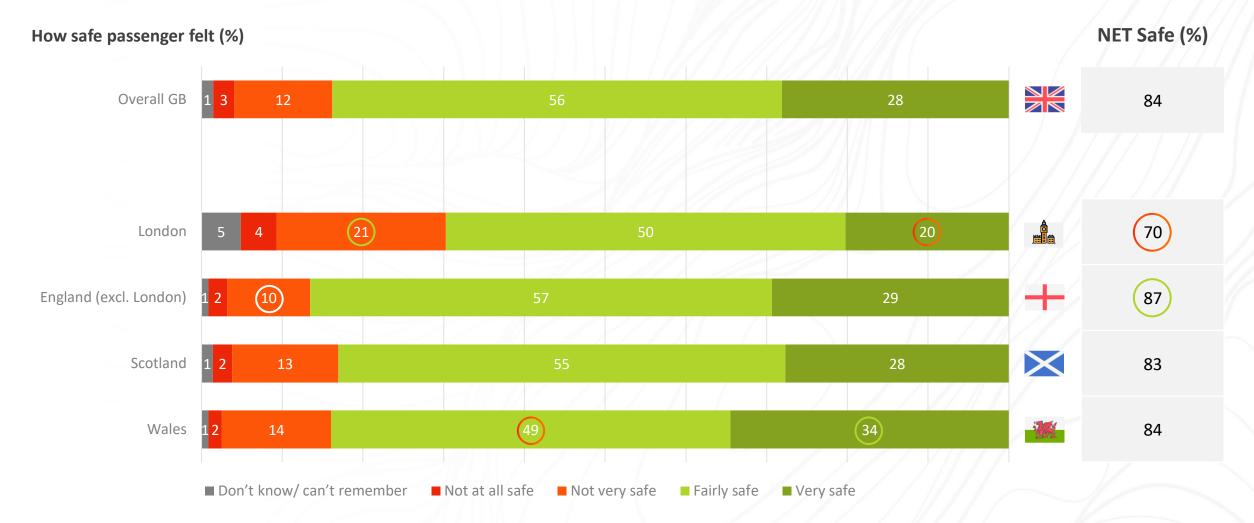






Most passengers who used the bus during the pandemic felt safe. London is the area where passengers felt the least safe with only 1 in 5 feeling very safe

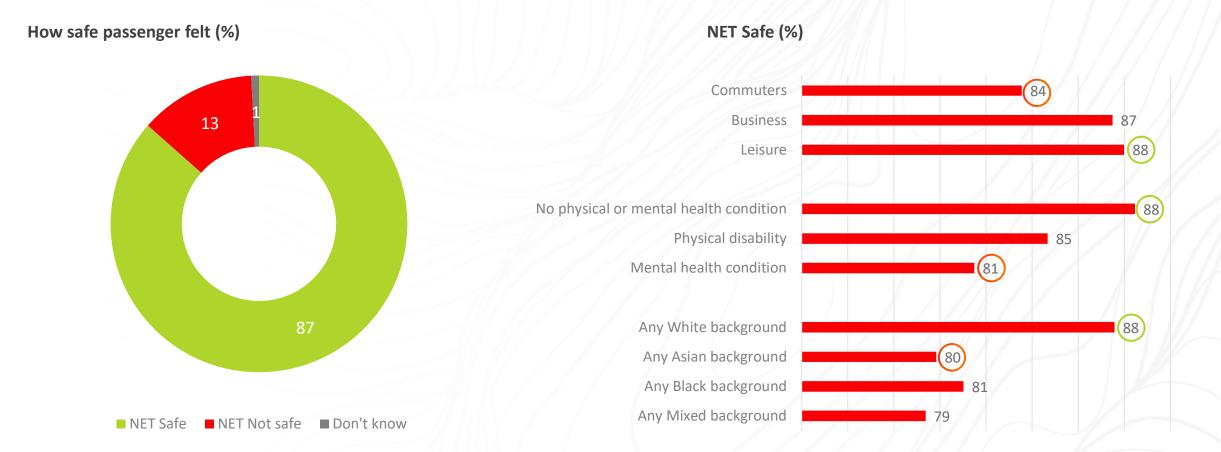






In England (outside London) those less likely to feel safe during their bus journey were commuting and those with a mental health condition or from an ethnic minority background

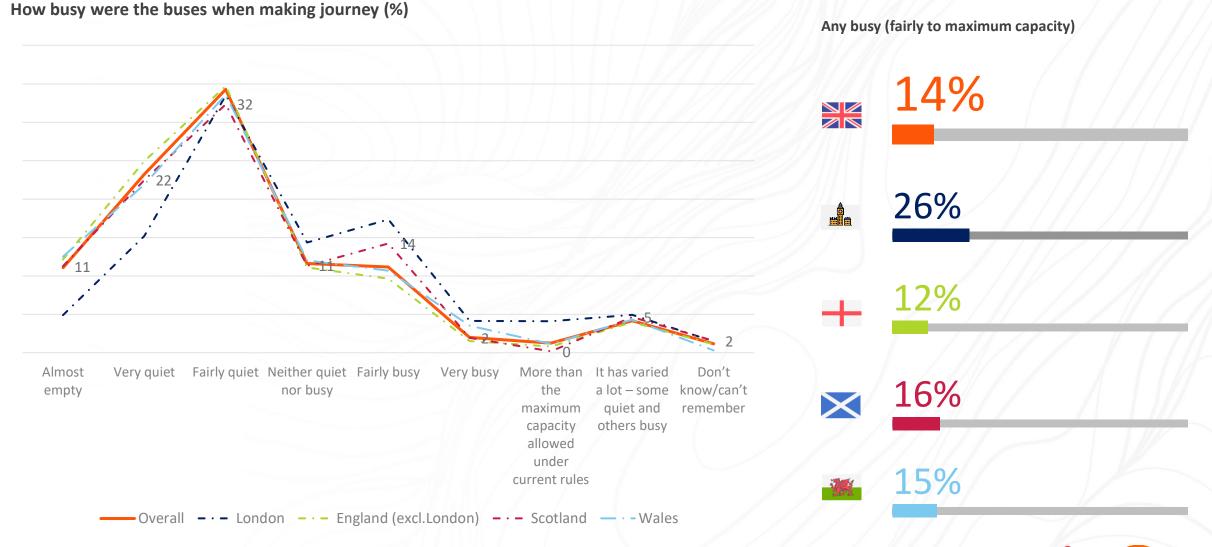
England (excl. London)





Passengers' feeling of safety is closely related with how many other passengers were on the bus, and in London, 1 in 4 passengers travelled on busy buses







Overall, just under 3 in 5 never had an issue with missing their bus because of capacity. In London the majority had missed their bus at least once because it was full



Able to catch the first bus (%) **NET Were not able** to catch the first bus all the time (%) Overall GB 40 65 London 37 England (excl. London) 38 Scotland 46 Wales 10 All of the time ■ Don't know / can't remember Most of the time Some of the time



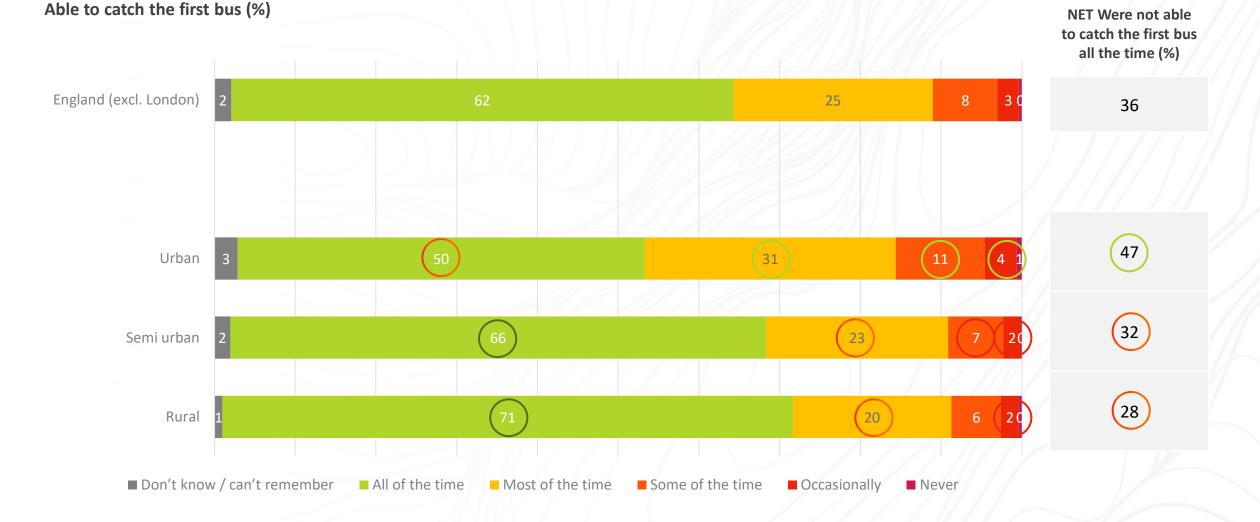
Occasionally

Never



In other urban areas of England this is also more likely to be the case than in semi urban or rural places

England (excl. London)

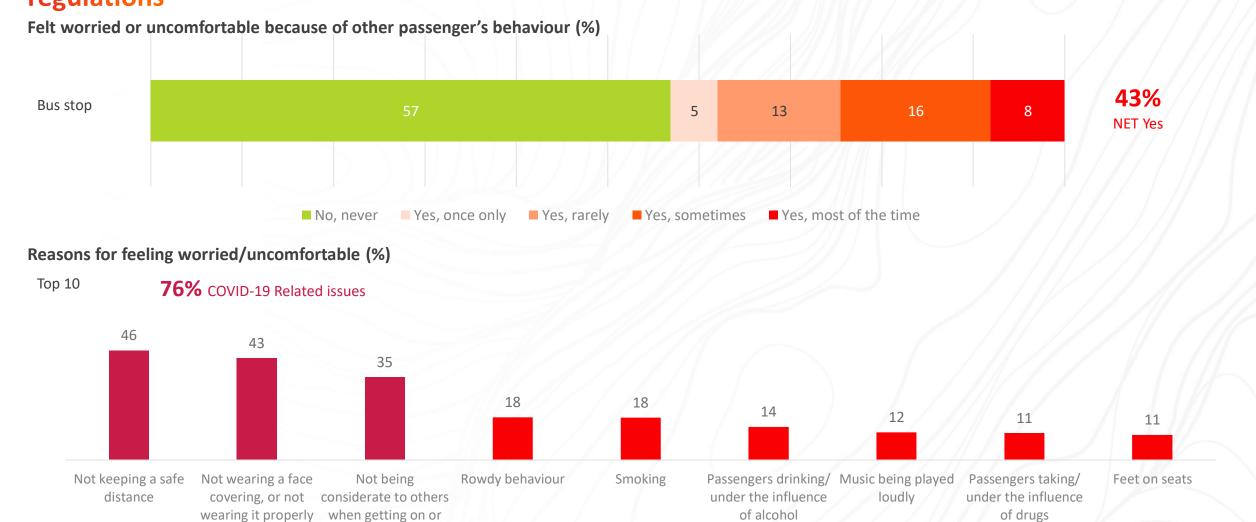






Two in five passengers felt worried or uncomfortable at the bus stop at some stage over the past year, mainly because of other passengers not complying to COVID-19 rules and regulations





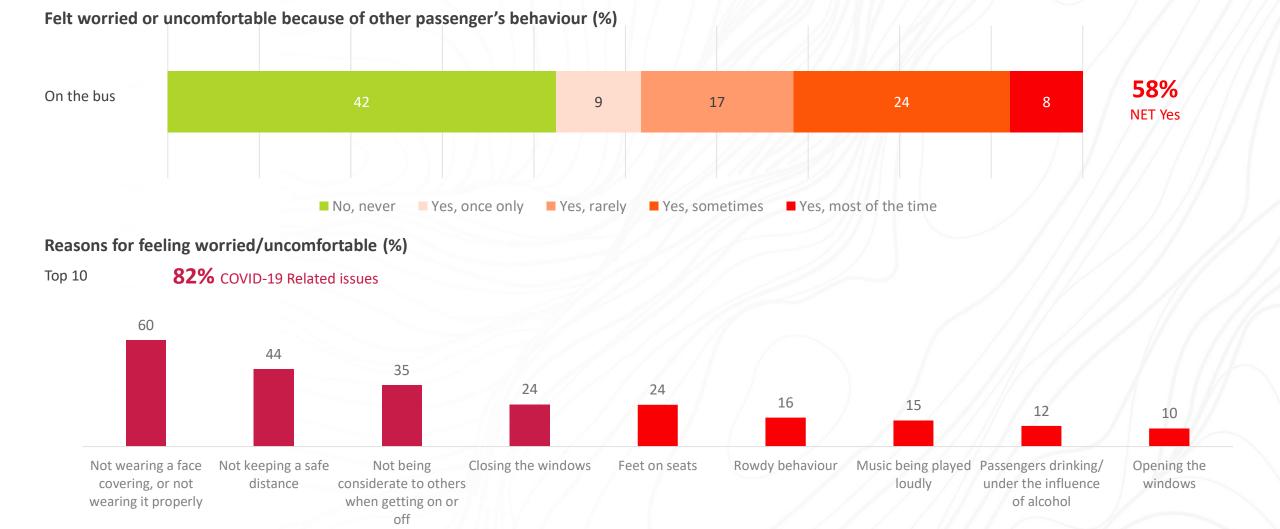




off (safe distancing)

Over half of passengers felt worried or uncomfortable on board the bus at some stage over the past year, with eight out of ten of those worried associating this with COVID-19 related behaviour



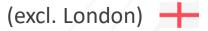


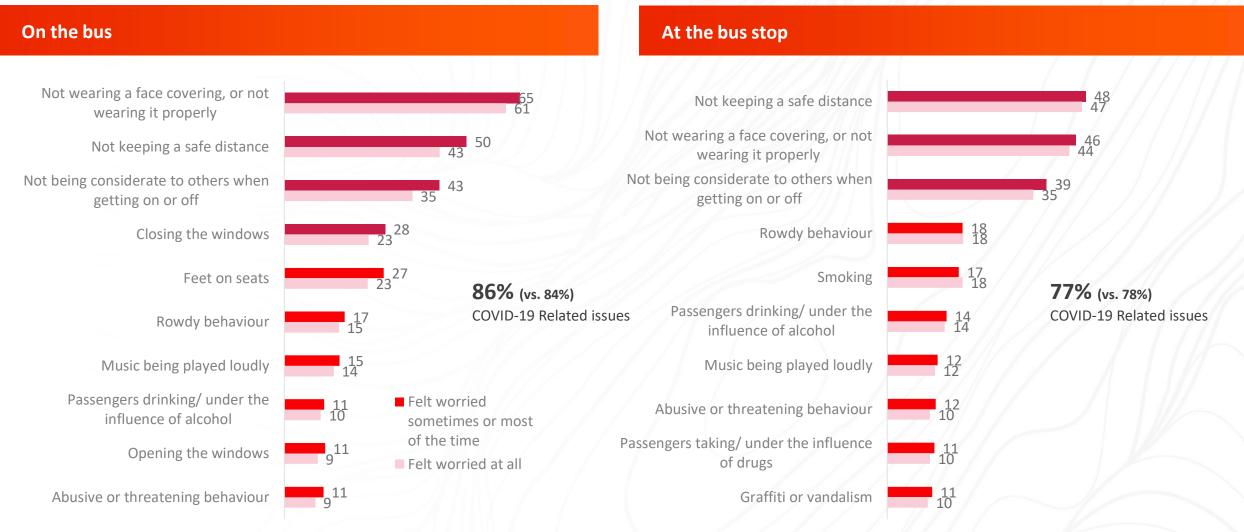




For those who felt worried sometimes or most of the time the same **COVID-19** issues are pointed out implying that these are recurring issues

England (excl. London)







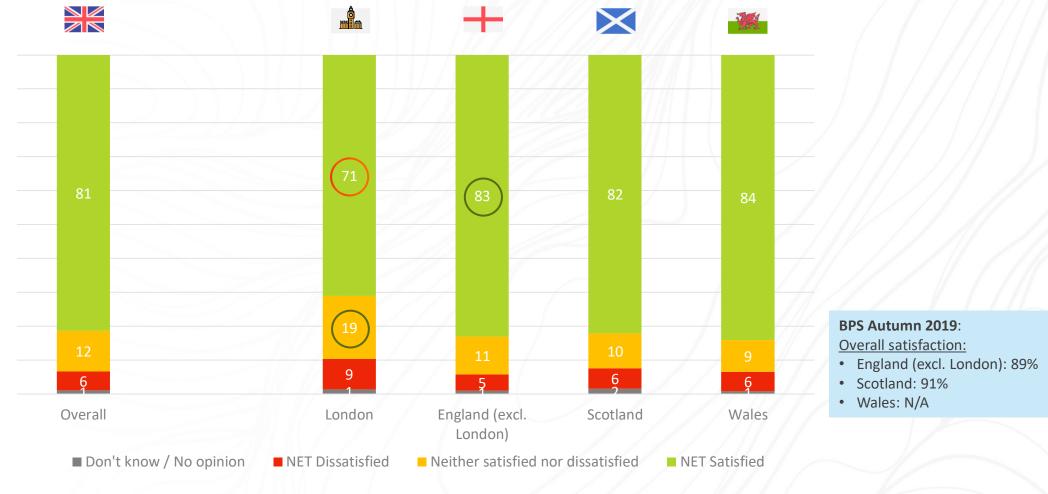


Top 10

Overall satisfaction with bus journeys during the pandemic is high. England (outside London) scores 83% which is slightly lower than the 89% 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 (%)



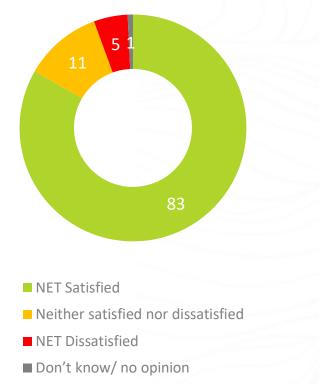




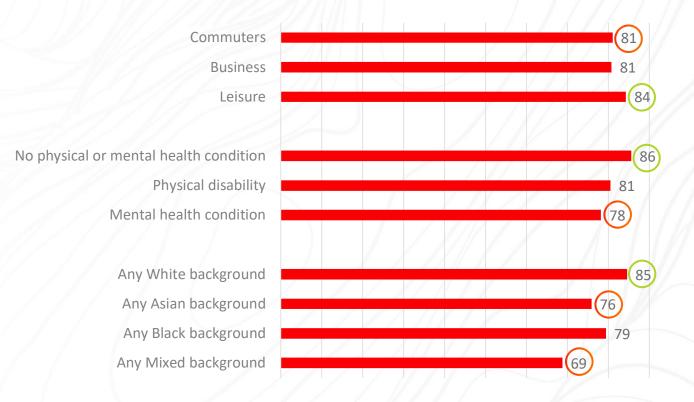
In England (outside London) those less likely to be satisfied were commuting and those with a mental health condition or from ethnic minority backgrounds

England (excl. London)

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



NET Satisfied (%)







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



Enforcement of wearing masks, see multiple people who get on wearing a mask and remove it as soon as they sit down.

Enforcement of passengers wearing face masks and keeping a good distance apart

It would have been better if everyone followed the guidelines of the distances between each other

More frequent buses and an easier way to find when they are scheduled/ when they're coming

The bus could be cleaner They could make sure COVID regulations are being followed

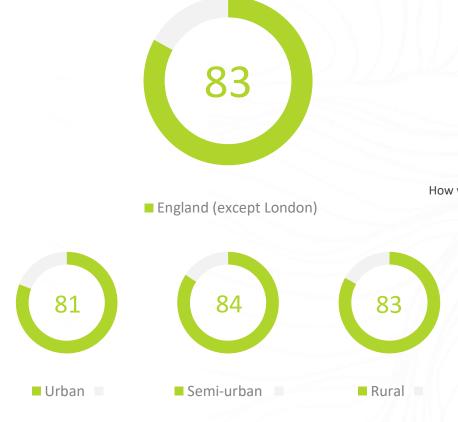
The hygiene. There was some litter on the floor and I don't think the bus had been cleaned for a while.



While overall satisfaction is stable across areas, specific satisfaction metrics vary a lot between urban and rural

England (excl. London) +

Overall satisfaction – by area type



Detailed satisfaction – by area type 30 40 50 60 70 80 90 The availability of seating or space to stand The bus being free of litter The punctuality of the bus (arriving on time) Able to keep a safe distance (getting on and off the bus) The helpfulness and attitude of the driver The hygiene of the bus Information about COVID-19 measures How well the bus company looked after passengers (COVID-19 safety) The frequency of services in your area Passengers keeping a safe distance on-board The payment options available Air ventilation The value for money of your journey(s) Enforcement of passengers to wear face coverings Information about services and fares Being able to find out how busy the bus is likely to be



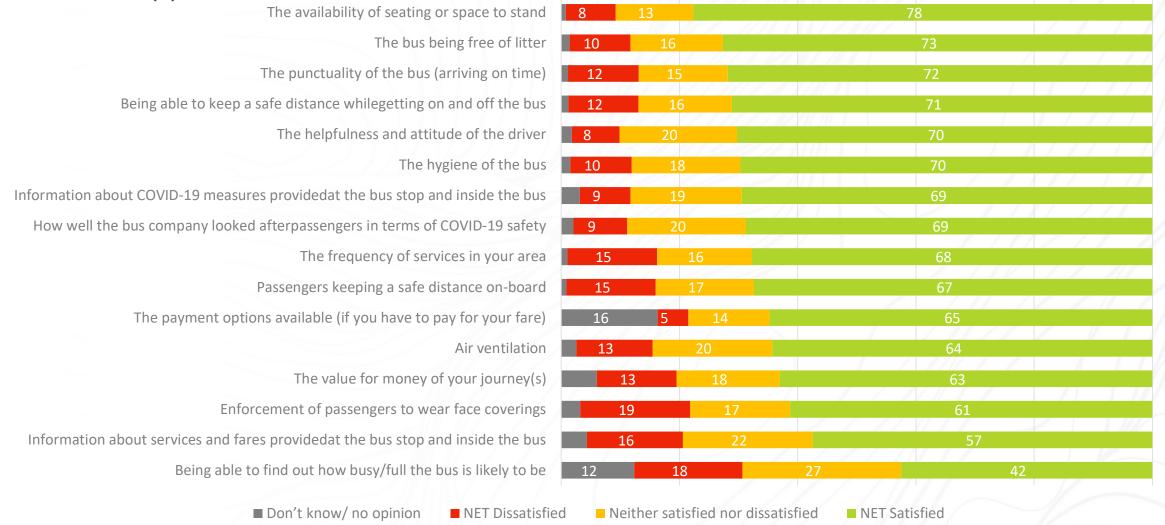
→ Urban → Semi urban → Rural



Fewer passengers took the bus during the pandemic leading to better availability of seating, which tops the satisfaction metrics. The ability to find out how busy the bus is likely to be (or if it is full), a greater concern during the pandemic, had the lowest level of satisfaction



Detailed satisfaction (%)



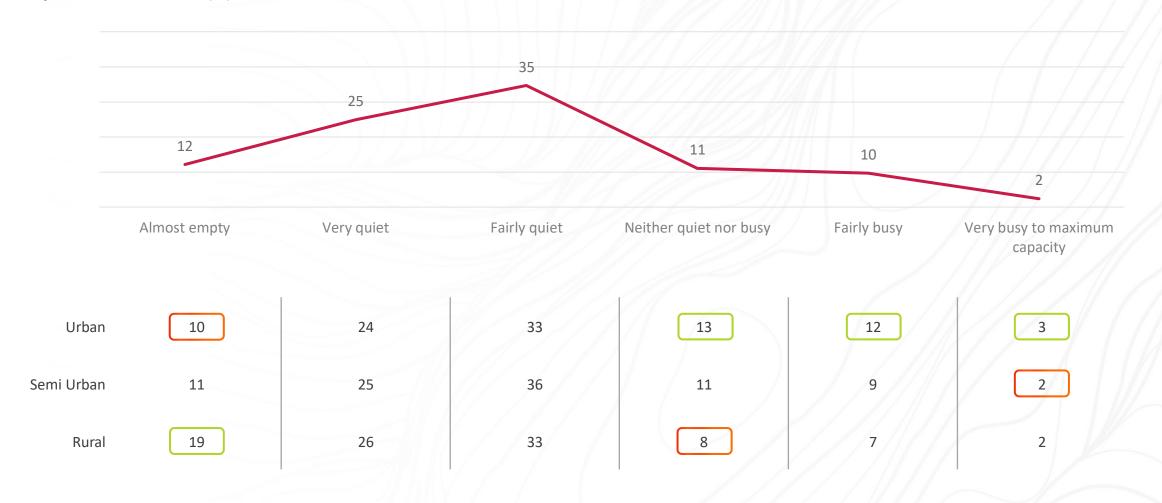




The experience of how busy the buses were varied a lot based on the type of area that passengers were located in

England (excl. London)

How busy the were the buses (%)



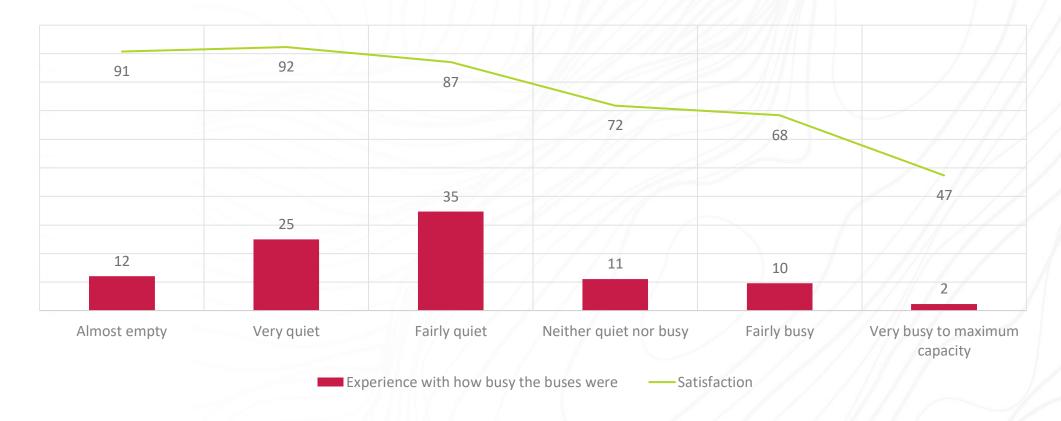


There is a clear correlation between satisfaction and how busy the bus was, as the busier the bus, the lower the satisfaction

England (excl. London)



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



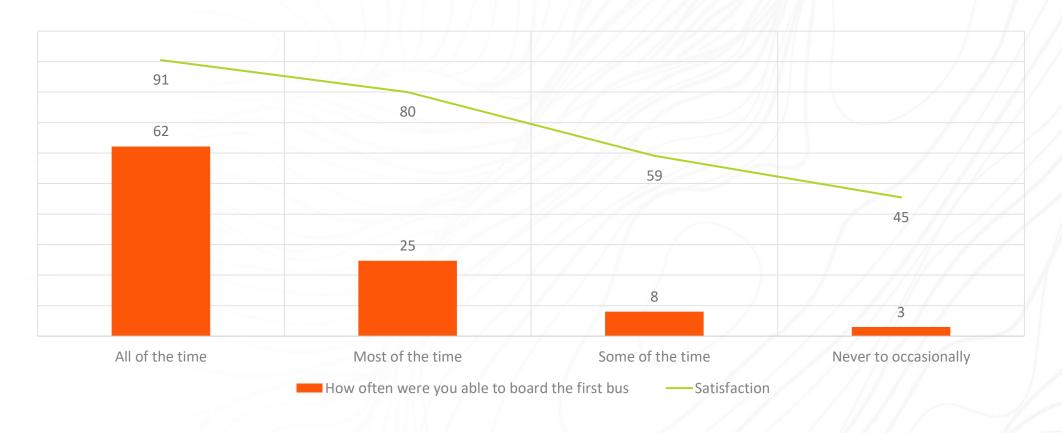




Satisfaction is also closely linked with passengers' experience of being able to board their first bus. For those who never had an issue their satisfaction is at 91%

England (excl. London)

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



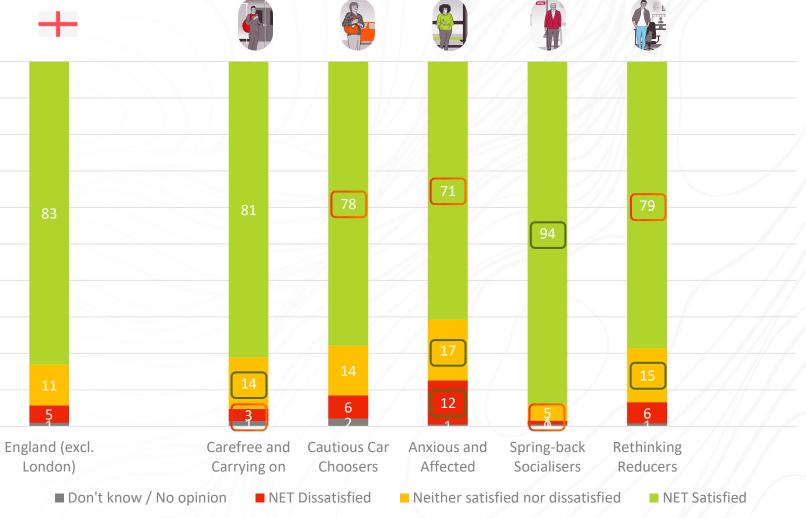




Satisfaction across segments also varies; here Spring-Back Socialisers top the ranking with 94% satisfied the Anxious and Affected sit at the bottom with only 71% satisfied

England (excl. London)

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





This is likely driven by their attitudes as opposed to the context of their travel

England (excl. London)



Satisfaction with travelling by bus since COVID-19 depending on time of day and type of travel (%)

NET satisfaction		+						
			Carefree and Carrying on	Cautious Car Choosers	Anxious and Affected	Spring-Back Socialisers	Rethinking Reducers	
Time of Day	Before 7am	81	79	81	72	93	75	
Type of journey	07:00 - 09.29	84	86	82	71	94	78	
	09:30 - 11.59	85	85	79	70	95	84	
	12:00 – 14:59	84	82	77	70	95	80	
	15:00 – 18:59	83	82	76	70	96	77	
	7pm onwards	83	81	81	76	88	84	
	On a weekend/ bank holiday	82	83	75	70	92	80	
	Commuting	81	80	80	71	92	79	
	Business	79	75	82	66	93	83	
	Leisure	84	82	77	71	94	80	





Rethinking Reducers, Anxious and Affected and Cautious Car Choosers have experienced worry or discomfort significantly more than other users at both the bus stop and on the bus

England (excl. London)

	England (excl. London)	Rethinking Reducers	Spring-Back Socialisers	Anxious and Affected	Cautious Car Choosers	Carefree and Carrying on	
At the bus stop (%)	23*	41	12	29	39	21	
On the bus (%)	30*	39	18	47	41	24	



The Anxious and Affected are significantly less likely to be satisfied on all of the specific attributes. Interestingly, this is also the case for the Carefree and Carrying on, despite 81% being satisfied overall

England (excl. London)



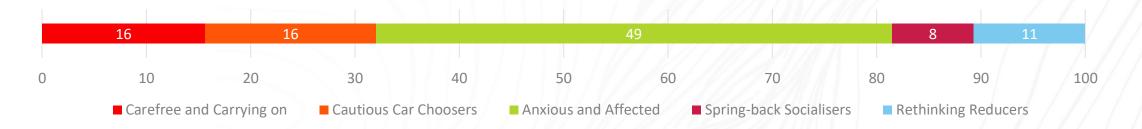
Petailed satisfaction (%)		Carefree and Carrying on	Cautious Car Choosers	Anxious and Affected	Spring-Back Socialisers	Rethinking Reducers
The availability of seating or space to stand	81	69	82	73	93	77
The bus being free of litter	75	65	79	65	86	71
Being able to keep a safe distance	74	66	76	60	87	68
The punctuality of the bus (arriving on time)	73	63	76	65	85	68
The hygiene of the bus	72	63	73	60	85	70
The helpfulness and attitude of the driver	72	63	74	62	84	69
How well the bus company looked	72	63	73	58	85	69
Information about COVID-19 measures	71	60	74	66	80	72
Passengers keeping a safe distance on-board	70	63	74	53	84	65
The frequency of services in your area	69	60	75	60	77	70
Air ventilation	66	58	69	53	78	63
The payment options available (if you have	65	61	74	66	62	70
The value for money of your journey(s)	63	55	69	51	72	64
Enforcement of passengers to wear face	62	55	71	46	72	65
Information about services and fares	58	54	68	46	63	62
Being able to find out how busy/full the bus	42	43	56	30	42	51



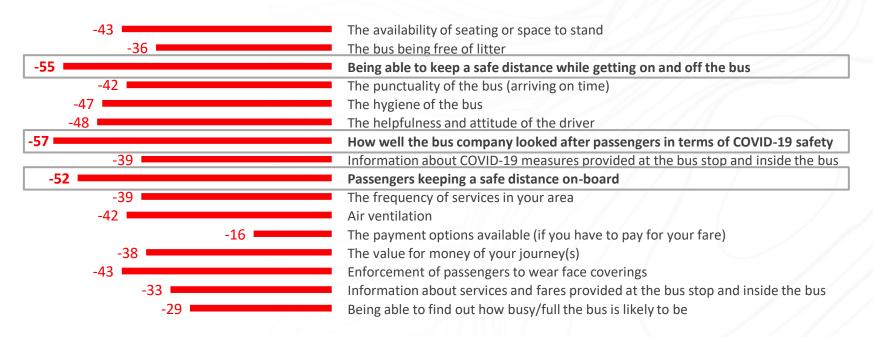


Almost half of all dissatisfied passengers are Anxious and Affected; on the specific metrics they are least satisfied with COVID-19 related items, such as keeping a safe distance, and how well the bus company looked after COVID-19 safety

England (excl. London)



Difference in satisfaction (dissatisfied satisfaction)*



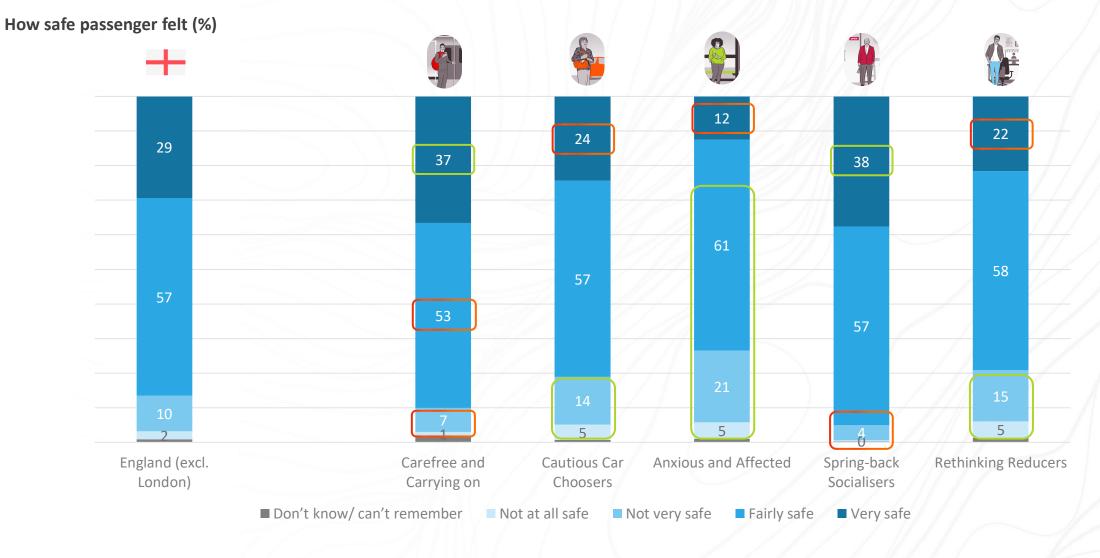
- Only 33% of the dissatisfied users were able to catch the first bus all of the time (vs. 62% England (except London))
- Only 21% of the dissatisfied users felt safe during their bus journey (vs. 84% England (except London))
- 42% of the dissatisfied users travelled in busy buses (vs. 12% England (except London))





The Anxious and Affected are significantly less likely to have felt safe on their bus journey(s) during COVID-19

England (excl. London)



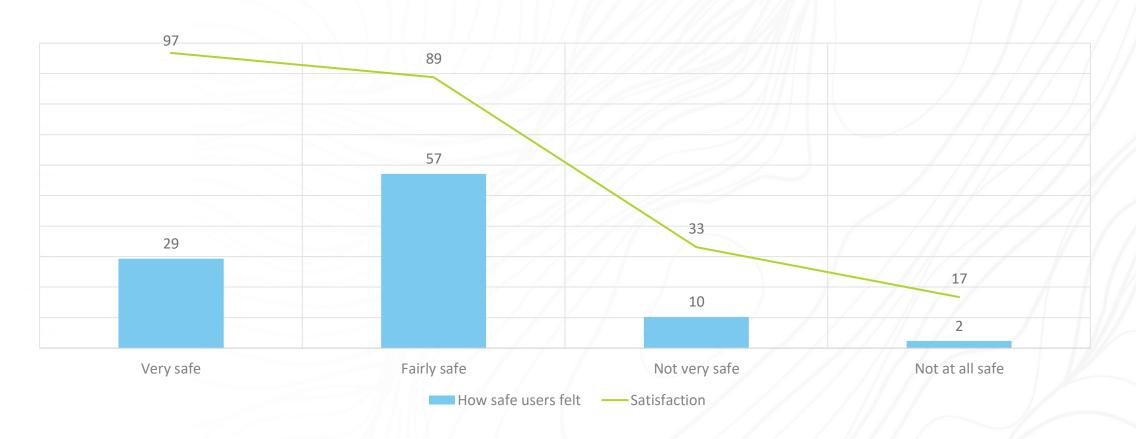




During the pandemic, feeling safe almost equals high satisfaction as both metrics are closely connected

England (excl. London)

Satisfaction based on how safe passengers felt (%)





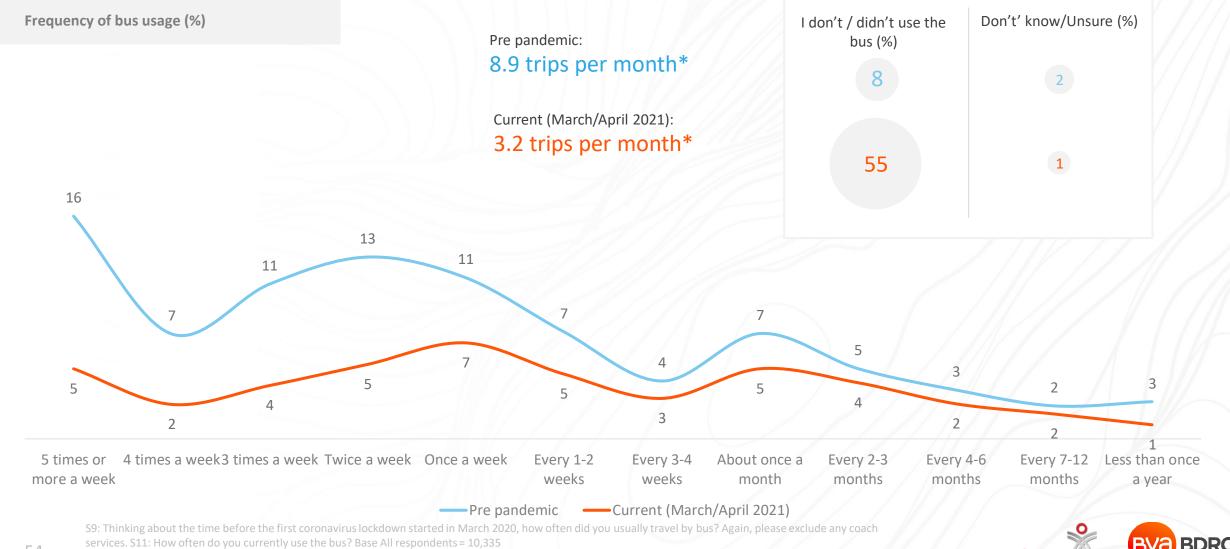




At an overall level use of buses has decreased by almost two thirds since the beginning of the COVID-19 crisis. Very frequent use was most impacted by the pandemic



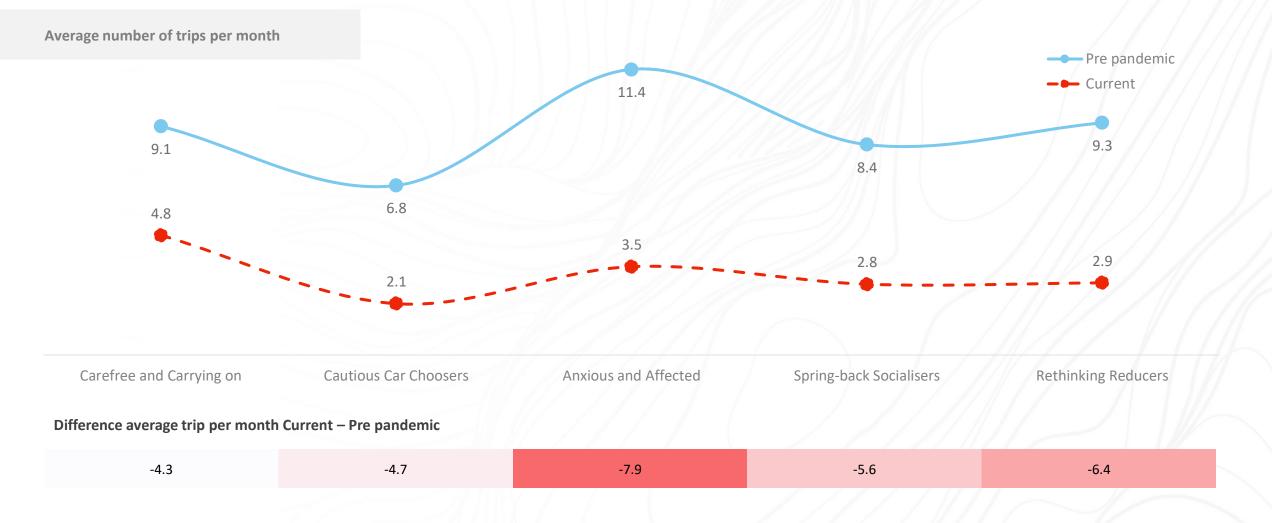
transportfocus l



^{*}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

The Anxious and Affected were the most frequent users pre pandemic and have reduced their use the most (by almost 8 journeys a month). Rethinking Reducers follow closely behind, making around 6 fewer journeys a month



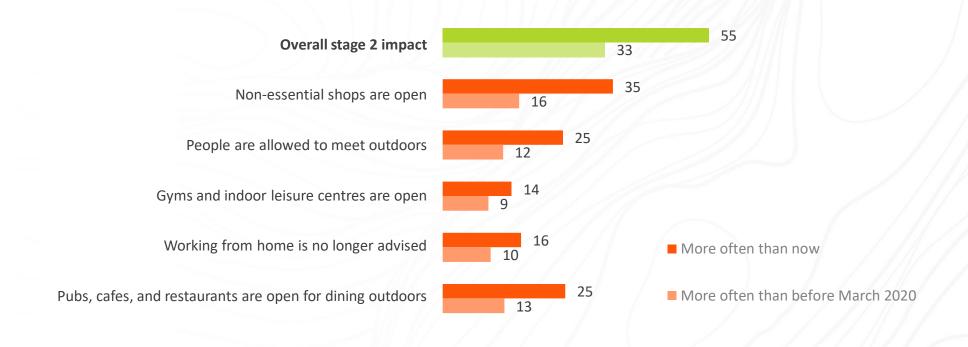




From stage 2 of the roadmap out of the lockdown, the opening of non-essential shops is the strongest driver to increase bus use



Will travel more than now (%)



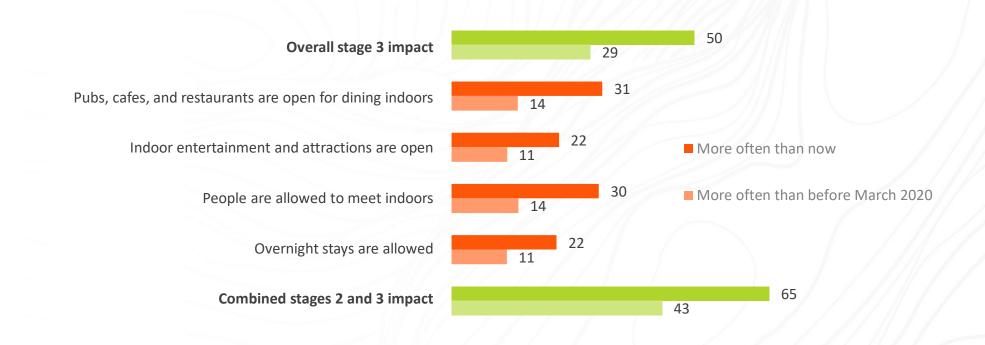




From stage 3 (introduced 17 May), the opening of pubs and restaurants indoors and being able to meet people indoors are the two main factors for increasing bus use



Will travel more than now (%)







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



Will travel more than now (%) 22 ■ More often than now **Overall stage 4 impact** 12 ■ More often than before March 2020 22 Large events are allowed and there is no legal limit on social contact 12 Combined stages 2 to 4 impact 45





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 of all current, lapsed and non-users 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

England (excl. London)

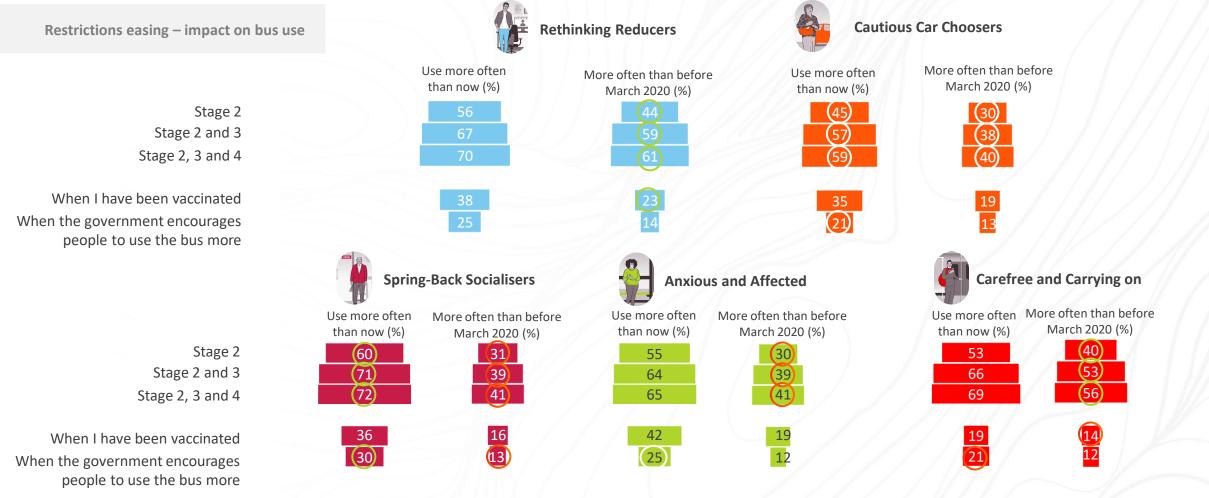
Vaccinations – impact on bus use Anxious and Spring-Back Rethinking Carefree and Cautious Car GB Carrying on Choosers Affected Socialisers Reducers I am already comfortable travelling by bus 37 (55) (17) 49 22 31 Not until a significant proportion of the population has been 25 vaccinated 38 22 11 31 28 Not until infection rates have reduced 23 32 11 31 19 25 Not until the government says it is safe for travel to resume 21 26 23 23 19 11 Not until I have been vaccinated 17 8 24 22 14 22 Not until my family and friends have been vaccinated 12 17 15 18 Not until priority/at risk groups have been vaccinated 10 7 14 12 8 13 Never





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, the Cautious Car Choosers and the Rethinking Reducers are those that need more reassurance and encouragement as they have the largest gap between pre and post frequency of bus use





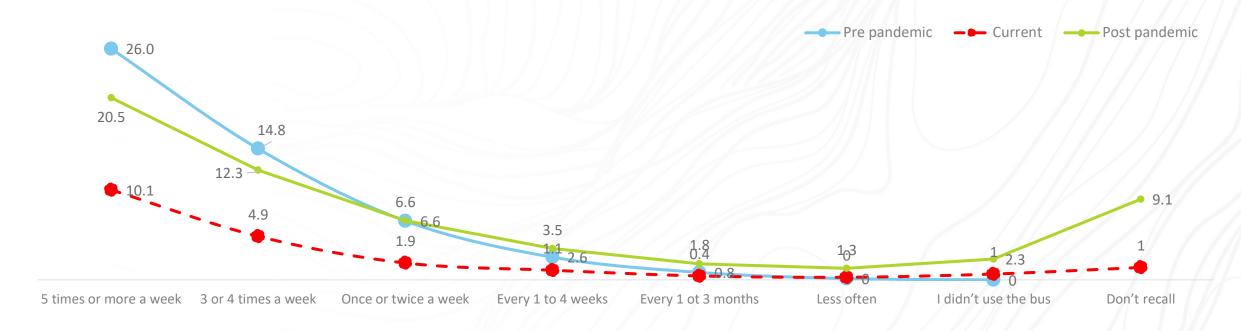




While the more frequent pre pandemic users are planning on decreasing their use post pandemic, the other groups are actually thinking about slightly increasing their use



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



Difference average trip per month Pre pandemic – Post pandemic





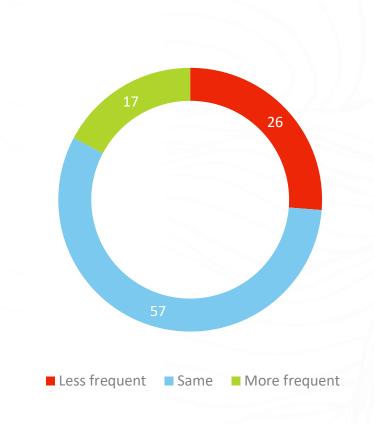


Around a quarter of all current, lapsed and non-users in England (outside London) is expecting to decrease their bus travel post pandemic. Pre COVID-19, these passengers most commonly used single/return tickets

England (excl. London)



Future bus use compared to pre pandemic (%)



Ticket type pre COVID (%)

	England (excl. London	Less frequent	Same	More frequent
A free pass or free journey	35	27	41)	26
A single/return/hopper ticket	31	37)	28	33
A day pass	23	28	19	34)
A pass/season ticket for a week or longer period		12	12	13
Not sure or something else	6	7	6	9





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

England (excl. London)

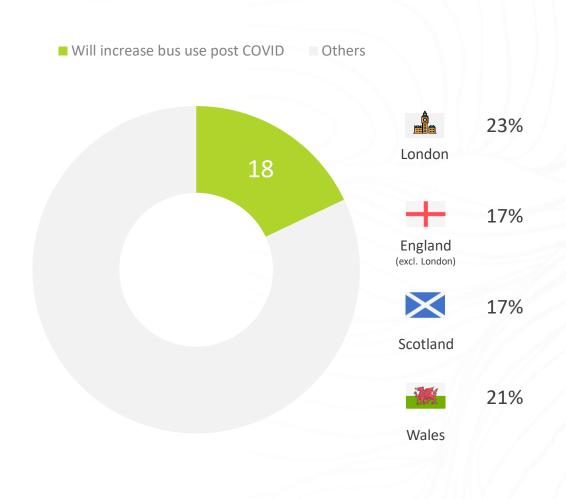
Planning on increasing frequency of bus use (vs. pre Covid) Trip type for increasing bus use post COVID-19 (%) **Carefree and Carrying on** 77 10 **Cautious Car Choosers** 24 85 35 10 82 **Anxious and Affected** 85 **Spring-Back Socialisers** 15 (72) 39 **Rethinking Reducers** ■ Commuting ■ Business ■ Leisure

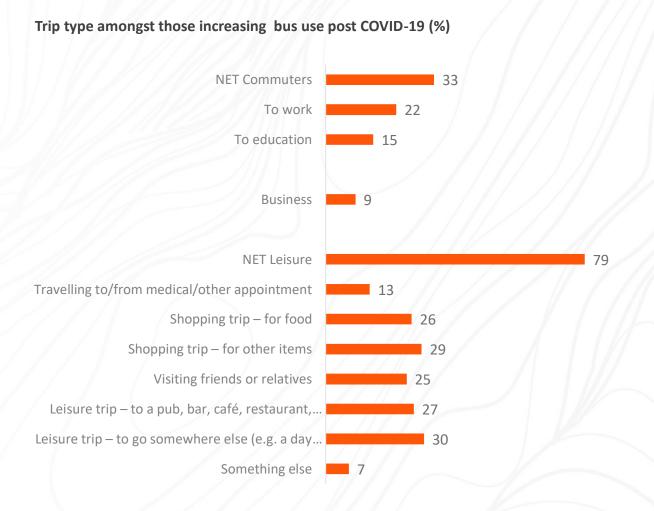




Leisure trips are by some margin the main reason for using the bus more often once the pandemic is over. The challenge for the industry is therefore to understand how to ensure this is maintained in the longer term





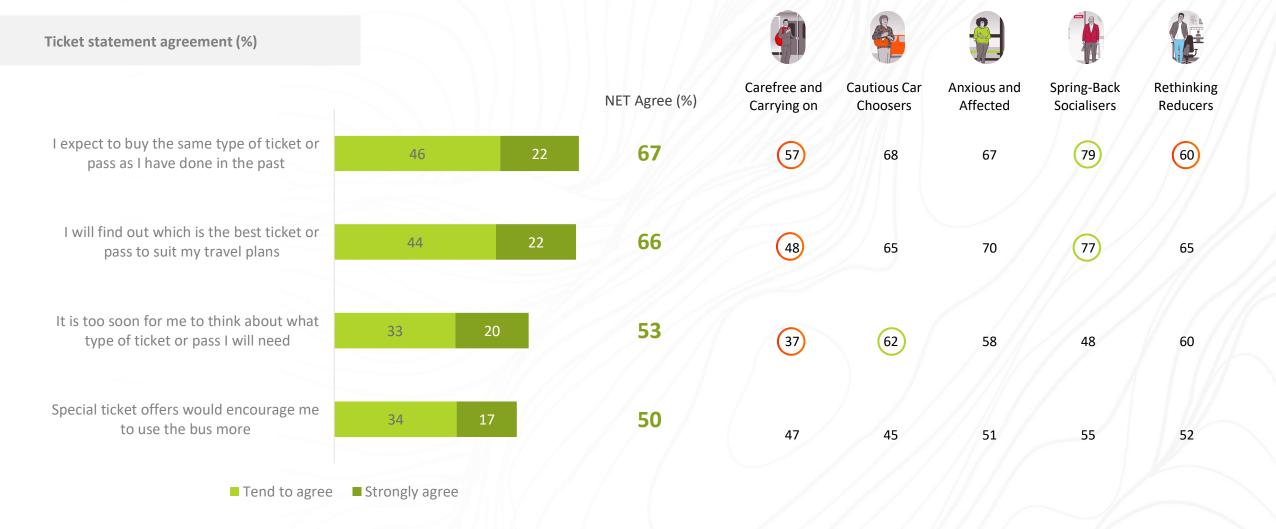






When they return to travelling by bus, many will be reviewing which ticket to buy or will be looking for special offers for their future bus use





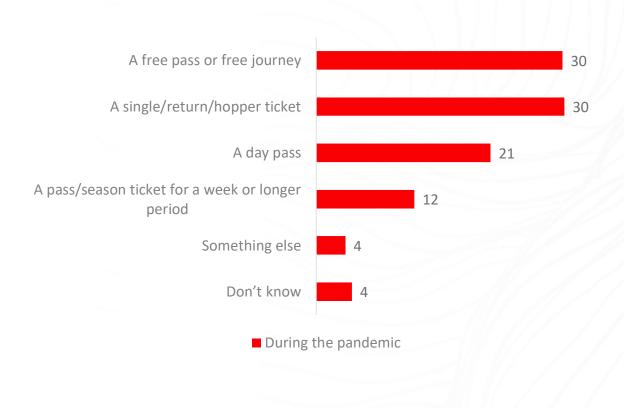


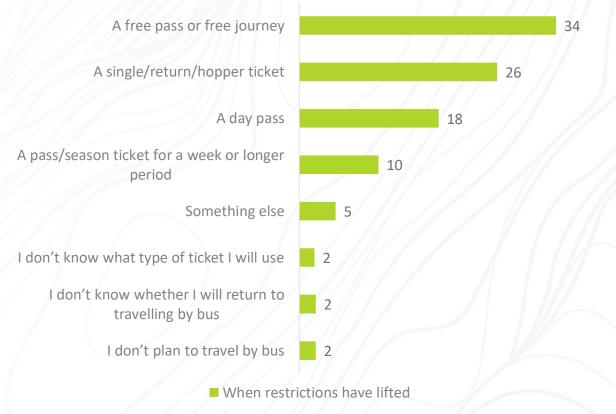


Free pass or free journey tickets will account for the same or a bigger share than they currently do whilst single/return/hopper tickets and day passes look set to decline in their share of use



Ticket type for travel in the future (%)





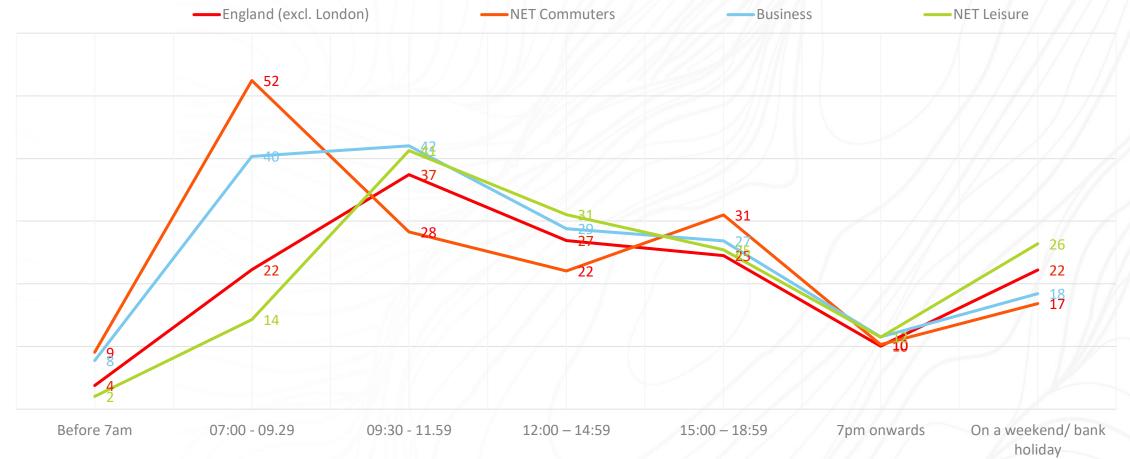




The most popular time slot for additional journeys is between 09:30-11:59, driven by leisure travellers, while additional commuter journeys will be heavily concentrated on the morning peak

England (excl. London)

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



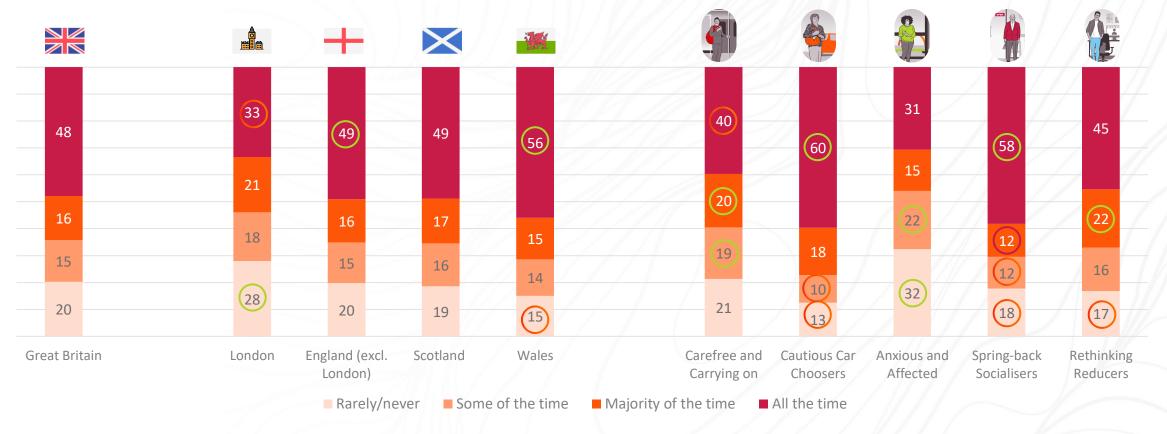




Currently just under half of respondents have access to a car all the time. In Wales, respondents are significantly more likely to have a car. The Cautious Car Choosers and Spring Back Socialisers are also more likely to have a car readily available whilst the opposite is true for the Anxious and Affected

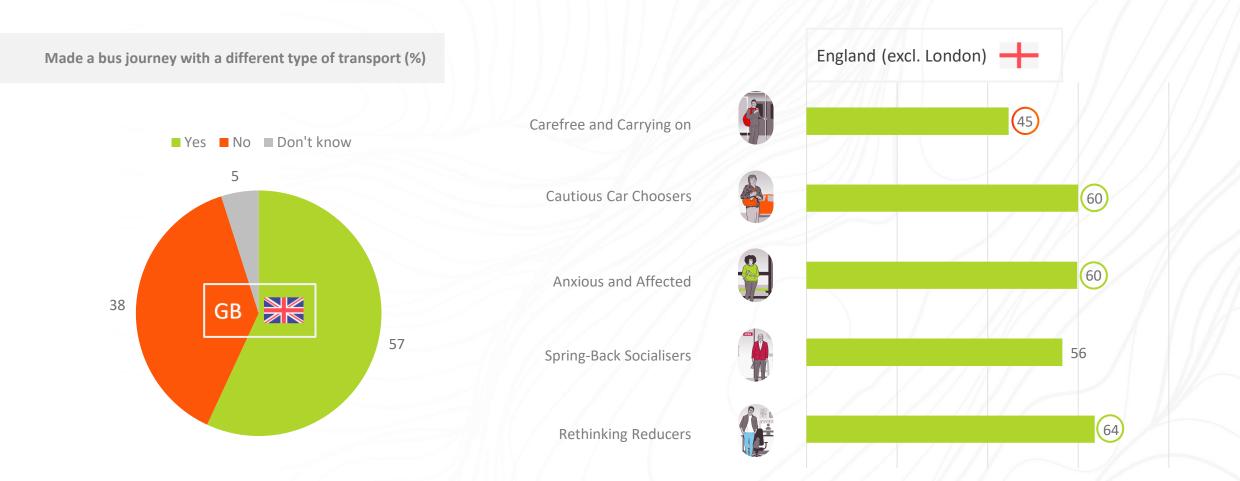


Frequency of car/motorbike availability (%)





Across Great Britain, regardless of the region, the majority of bus users opted for another type of transport (including walking) since the beginning of the COVID-19 crisis







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 differer	nt type of transport (%)				$\boldsymbol{\times}$	
			London	England (excl. London)	Scotland	Wales
Walking		60	70	59	60	56
Private car/motorbike		47	32	49	51	53
Cycling	19		24	19	18	20
Uber / Car share / Taxi	17		18	17	16	15
Train	15		30	12	19	14
Tram / Subway / Underground	5		12	4	4	2
Coach	2		1	1	2	2

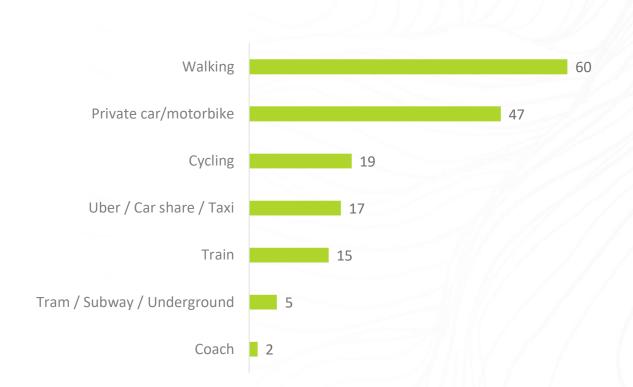




When bus users switched modes for commuting or business trips, they were more likely to cycle or use the train than for other journey types



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



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

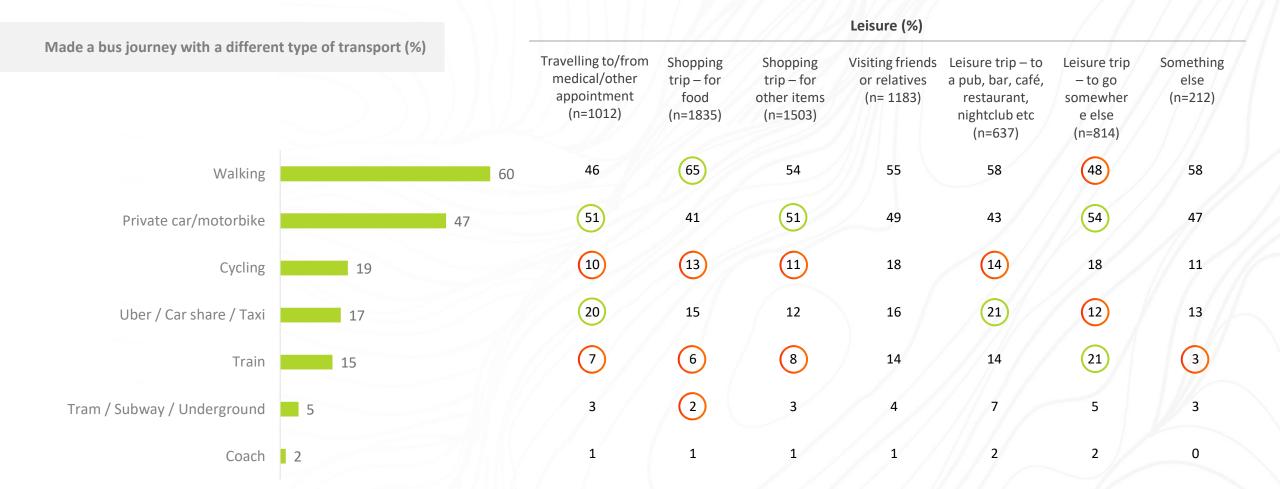
Com	muter	Business
Work	Education	
54	54	51
39	37	43
23	30	27
16	12	17
18	22	24
7	7	9
2	3	1





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

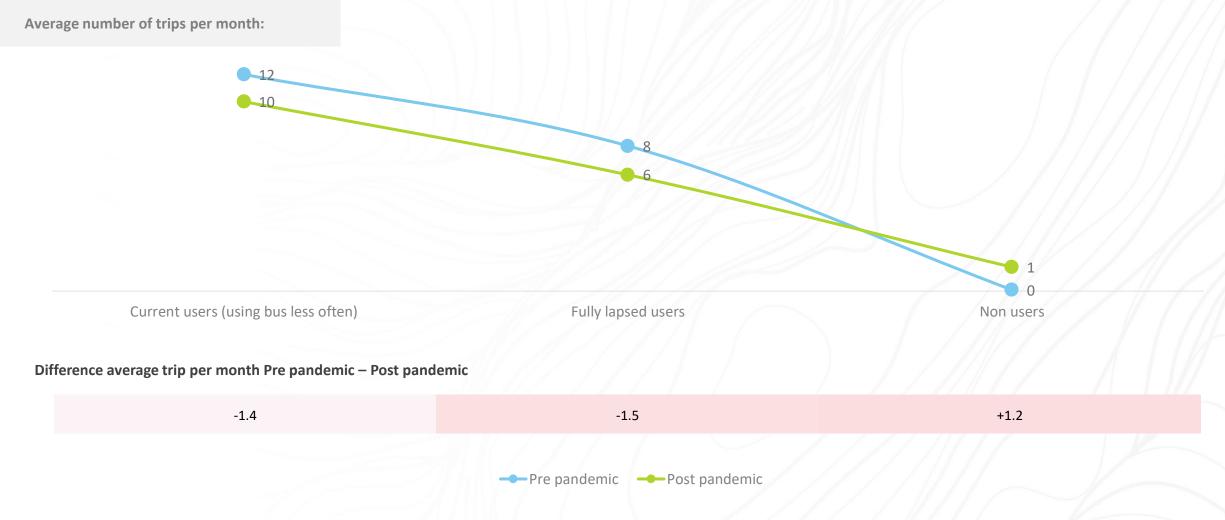








Current users, who have been using the bus less often during the pandemic are expected to continue the trend of less usage post pandemic. Lapsed users are also likely to reduce their usage







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

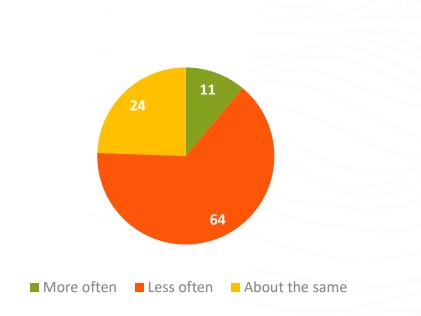


2 in 3 current passengers are using the bus less often and this is a similar picture across all the segments; although amongst Carefree and Carrying on the majority are using the bus more often or about the same

England (excl. London)

Frequency of travel (%)

Pre-pandemic compared to during the pandemic









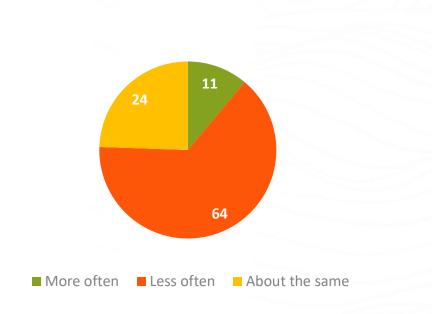
Those who live in semi-urban or rural areas are more likely to have reduced their bus use than urban bus passengers

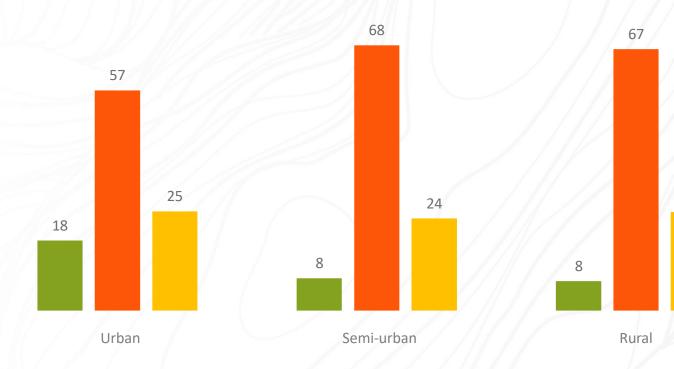
England (excl. London) =

Frequency of travel (%)

Frequency among segments (%)

Pre-pandemic compared to during the pandemic







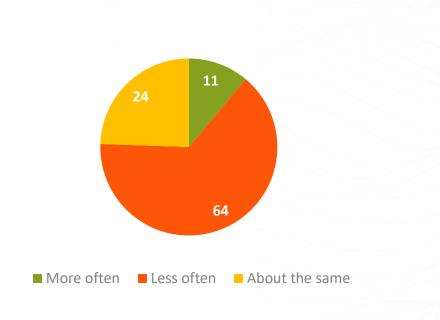
Over half of all traveller types have reduced their bus use, more so amongst leisure travellers

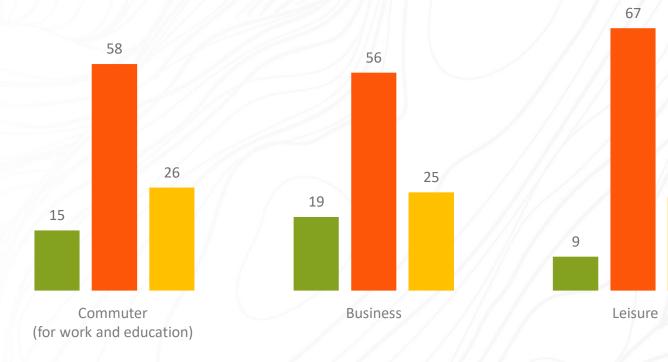
England (excl. London)

Frequency of travel (%)

Frequency among segments (%)

Pre-pandemic compared to during the pandemic







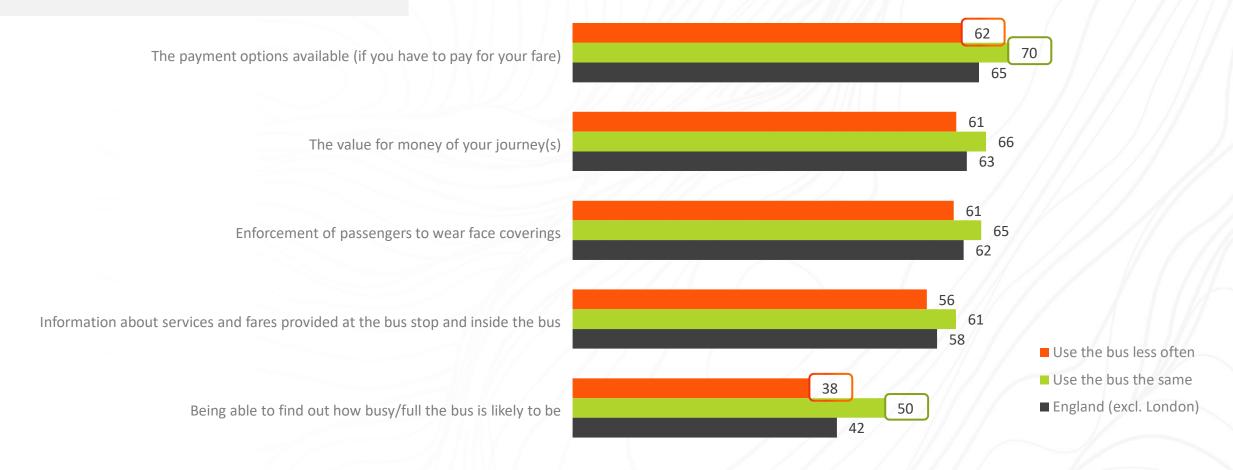


24

The payment options available and finding out how busy the bus is likely to be are areas that reduced users are significantly less satisfied with compared to those using the bus as often as before

England (excl. London)

Satisfaction ratings (% NET satisfied)

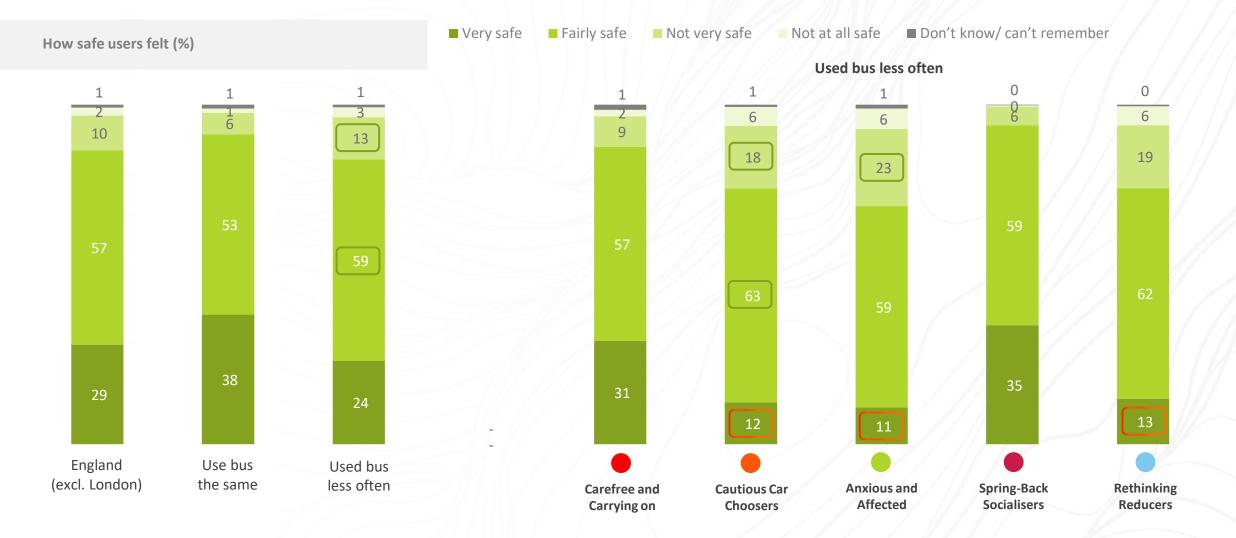






83% of reduced users felt safe. However, a larger proportion felt unsafe relative to the average and this was most apparent amongst Cautious Car Choosers and the Anxious and Affected





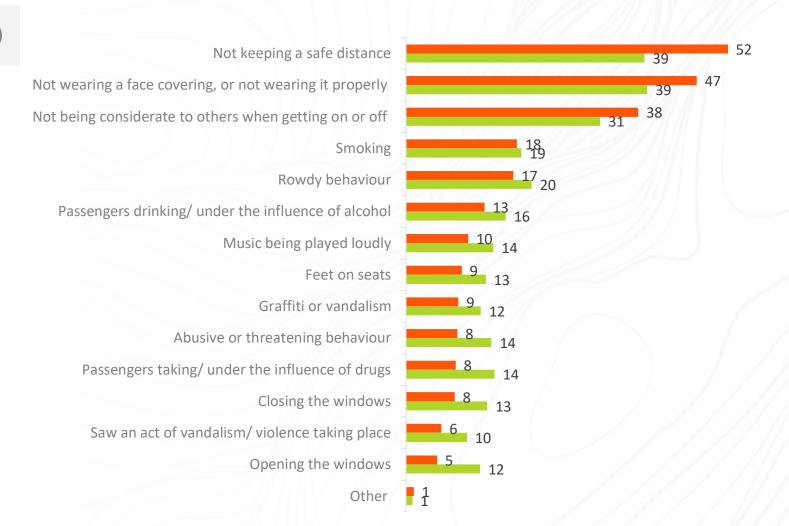


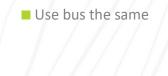


COVID-19 specific reasons are largely the reason for feeling worried at the bus stop among those who have reduced their use of the bus

England (excl. London)

At the bus stop (%)





■ Used bus less often

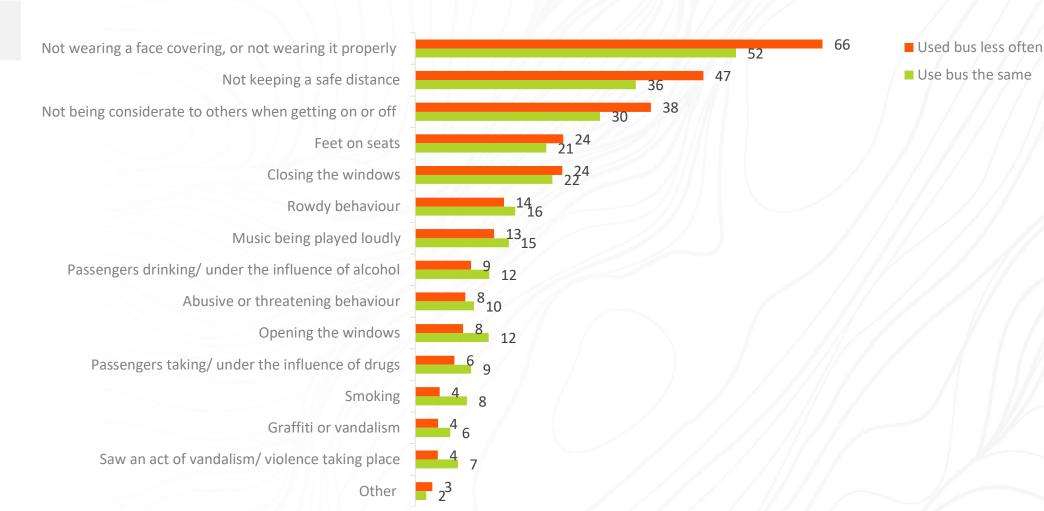




This is a similar story when on the bus where 66% of those who have reduced their usage and felt concerned selected non-wearing of face coverings as a cause for this concern

England (excl. London)

On the bus (%)



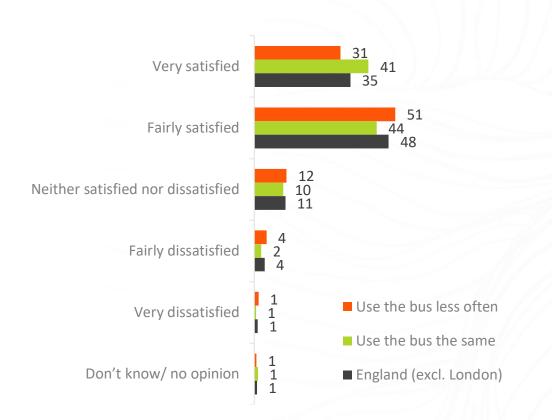




Overall, those who were using the bus less often were satisfied but significantly fewer were 'very satisfied' compared to users who are using the buses the same amount

England (excl. London)

Satisfaction with bus journey (%)





Not much more they could have done, signage was good and Covid measures were put in place



Extra buses for those who were unable to get on the bus because of limited numbers of passengers

I was just worried because of Covid being rampant. The bus company were doing their best in the circumstances



Knowing if you can get on the bus before it turns up rather than having to wait another 10 mins....also asking passengers keepsake distance when embarking and disembarking



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



Enforcement of wearing masks, see multiple people who get on wearing a mask and remove it as soon as they sit down.





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 now (March /April 2021)







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

England (excl. London)

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, particularly in terms of journey length, value for money and no bus services available

England (excl. London) —

Reasons for reducing or not using the bus since March 2020 ■ Fully lapsed users Non users Current users (using but less often) 30 18 18 Travelling by Too unreliable Poor value for Not convenient Poor frequency of Overall journey Another reason None of the above Too Fares too No bus services another mode is crowded/difficult complicated money when when travelling close to where I bus takes too long live / where I want travelling with with luggage more convenient to get a seat others to go



England (excl. London)



Top 10 reasons for reducing or not using the bus since March 2020



43

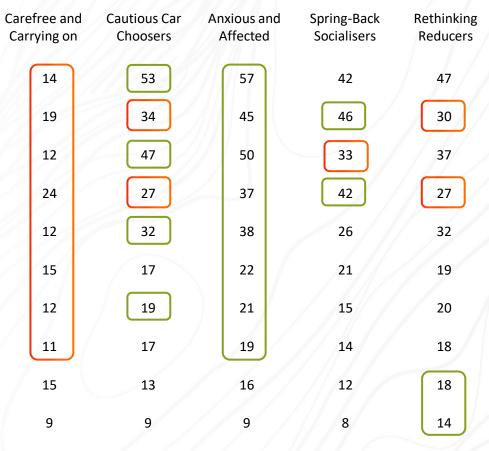








Concerned about catching COVID-19			
Following government guidelines			37
Passengers not following COVID-19 measures			36
Because there are fewer leisure occasions			33
Concerned about spreading COVID-19			28
I am shopping more locally		19	
I am having food shopping delivered		17	
I am having other shopping delivered		15	
I am able to work from home		14	
I am doing more online meetings	9		





England (excl. London)

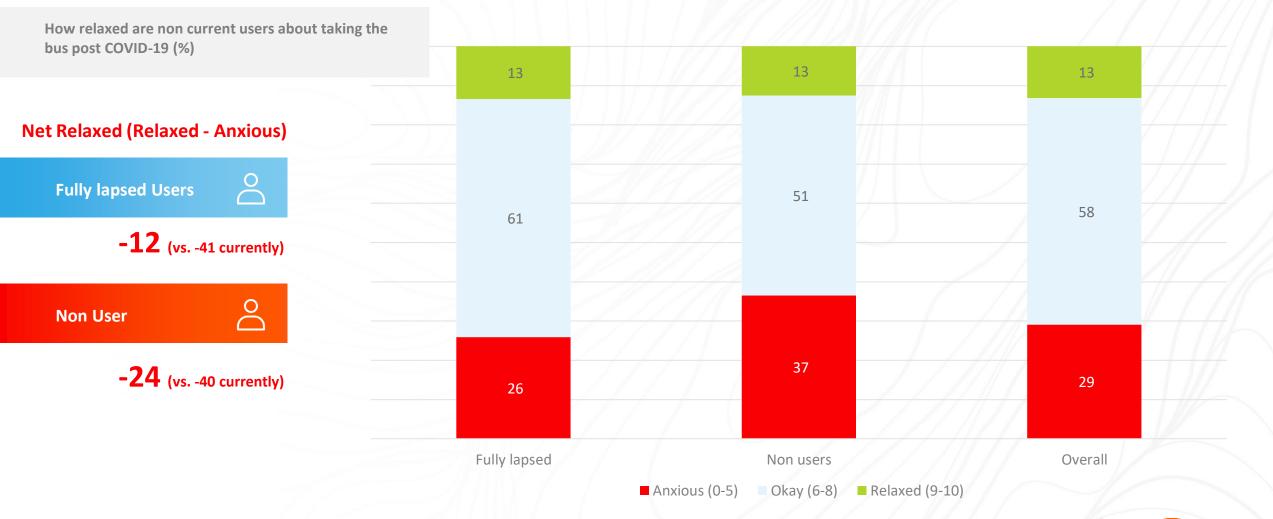
The Cautious Car Choosers and the Rethinking Reducers are more likely to explain their bus use reduction with non-COVID reasons

Reasons for reducing or not using the bus since March Rethinking Anxious and Spring-Back Carefree and Cautious Car Affected Socialisers Reducers Carrying on Choosers None of the above Travelling by another mode is more convenient Poor frequency of bus Too crowded/difficult to get a seat Too unreliable Another reason (please specify) Overall journey takes too long Poor value for money when travelling with others No bus services close to where I live / where I want to go Not convenient when travelling with luggage





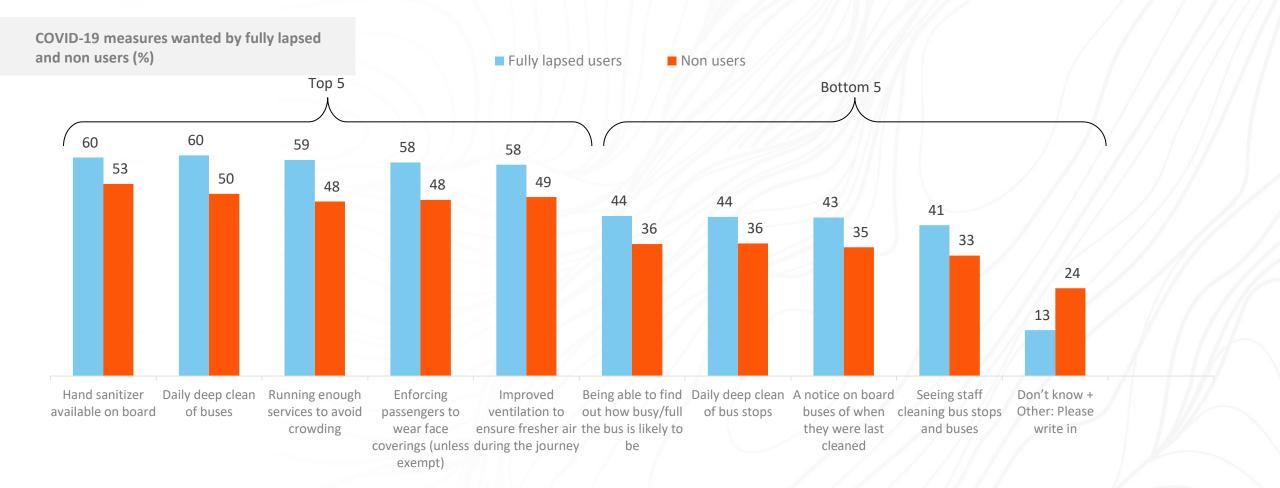
Looking ahead to the summer both user types are a little more confident, with fully lapsed feeling more relaxed than non users







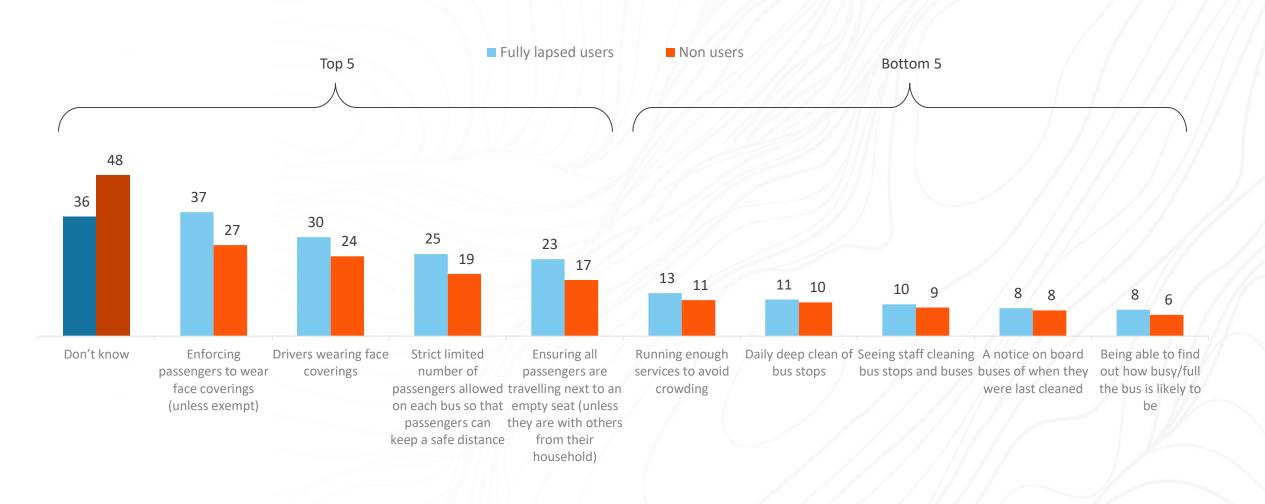
While COVID-19 is still present, measures in place to minimise the spread, such as sanitiser and deep cleaning are what these two user groups would most like to see







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

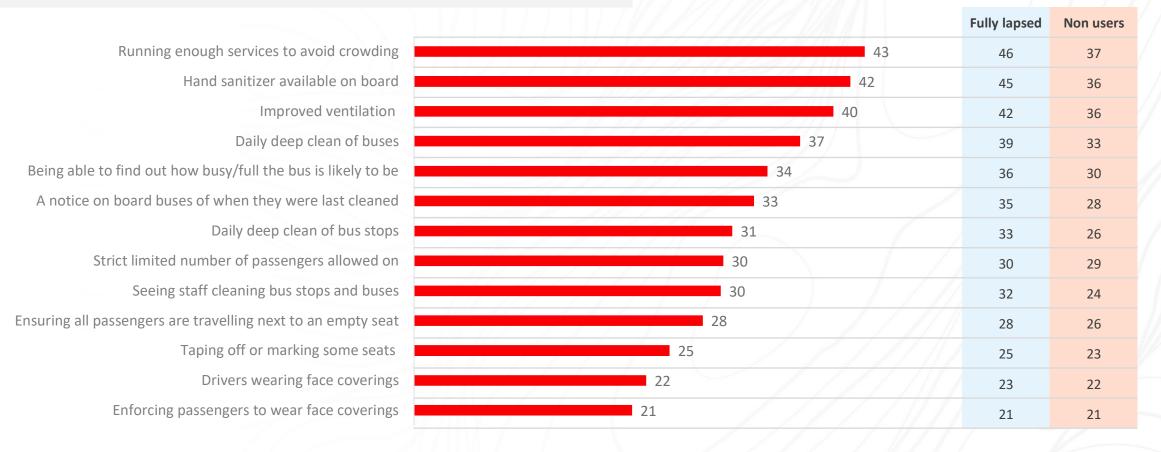




The 'need gap' shows that crowd control, sanitising and ventilation is what people want to see but they are not always aware that these are in place

England (excl. London)

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





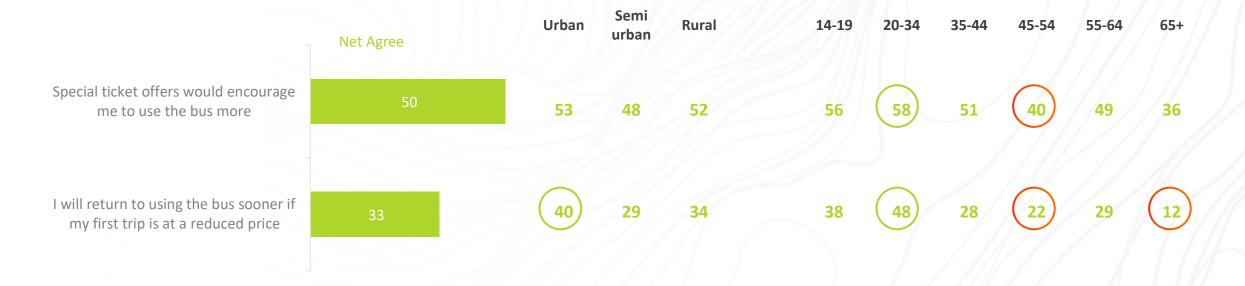




Ticket discounts and special offers will encourage a large share of lapsed users to use the bus more than now, especially the younger ones

England (excl. London)

Ticket statement agreement amongst lapsed users (%)

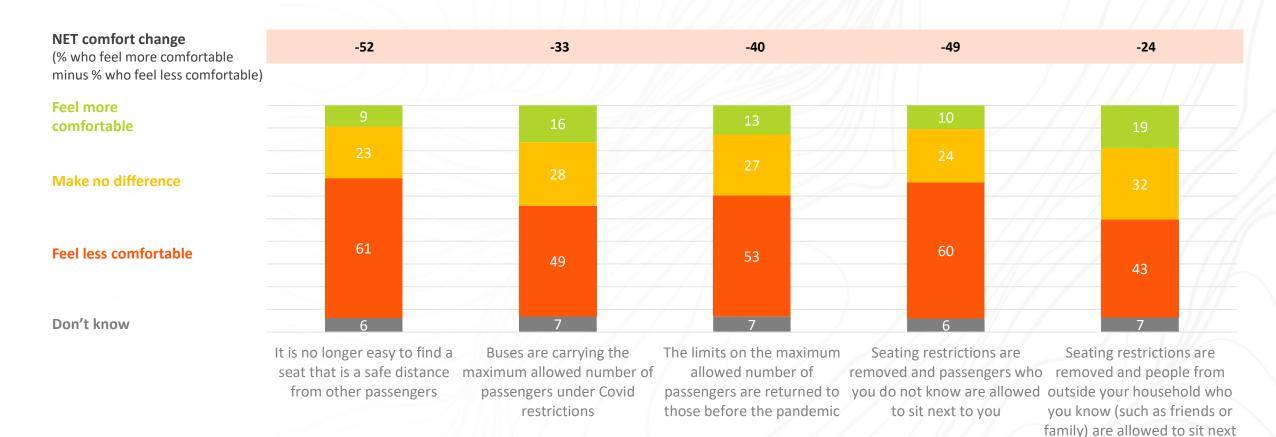




However, the easing of the COVID-19 measures on buses will result in considerably greater discomfort amongst current and lapsed passengers



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





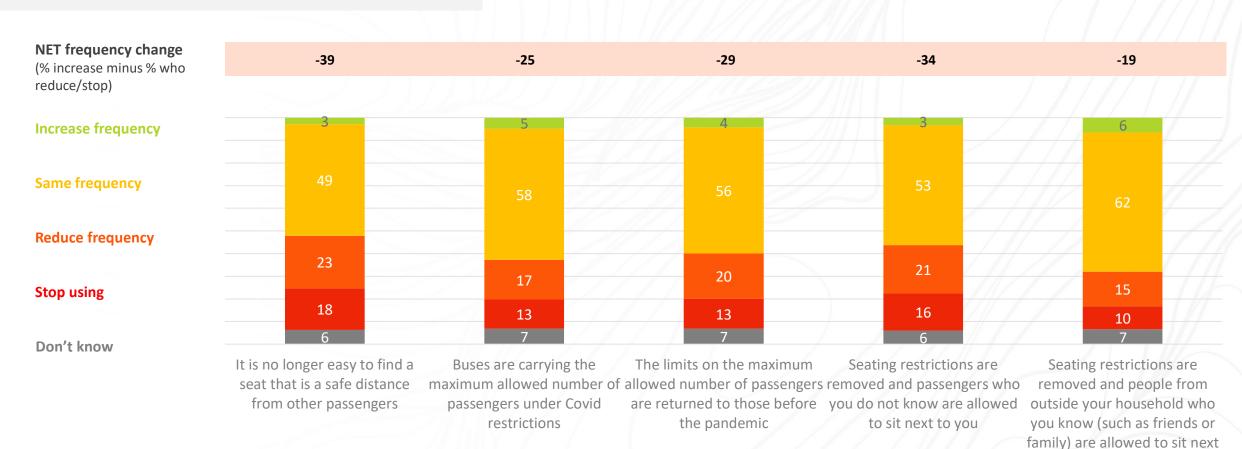


to you

For a notable proportion, these changes will result in a reduction in the frequency of using the bus



Impact on frequency amongst all users (except non-users) (%)







to you

In England (outside London) fully lapsed users are more likely than current users to say they will feel less comfortable for each of the scenarios

England (excl. London)



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

Seating restrictions are removed It is no longer easy to find a seat Buses are carrying the maximum Seating restrictions are removed The limits on the maximum allowed that is a safe distance from other and people from outside your 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 passengers friends or family) are allowed to sit next to you **NET frequency change** (% increase minus % who -52 -22 -49 -56 -32 -33 -39 -42 -48 -26 reduce/stop) 11 Feel more comfortable Make no difference 66 63 58 56 57 50 51 Feel less comfortable 45 46 40 Don't know Fully lapsed Fully lapsed Fully lapsed Fully lapsed Current users Current users Current users Current users Current users Fully lapsed





... and fully lapsed users are more likely than current users to say they will reduce their bus use for each of the scenarios

England (excl. London)



Impact on frequency levels amongst users (%)

	It is no longer ea that is a safe dista passer	ance from other	Buses are carryin allowed number under Covid	of passengers	The limits on the m number of passeng to those before	gers are returned	and passengers	ons are removed s who you do not d to sit next to you	and people from household who friends or family	ions are removed om outside your you know (such a) are allowed to s to you
NET frequency change (% increase minus % who reduce/stop)	-33	-47	-21	-30	-24	-36	-29	-41	-15	-24
Increase frequency	3	3	5	5	4	4	3	4	6	6
Same frequency	55	42	63	54	61	50	58	45	67	57
Reduce frequency		25						23		
Stop using	22	24	16	18	19	18	21	22	14	17
Don't know	6	6	6	7	6	7	6	6	8	7
	Current users	s Fully lapsed	Current users	Fully lapsed	Current users	Fully lapsed	Current users	Fully lapsed	Current users	Fully lapsed





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

England (excl. London)



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



Rethinking Reducers



Spring-Back Socialisers



Anxious and Affected



Cautious Car Choosers

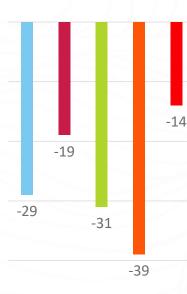


Carefree and Carrying on

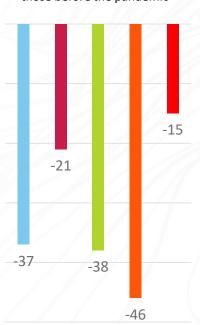
It is no longer easy to find a seat that is a safe distance from other passengers



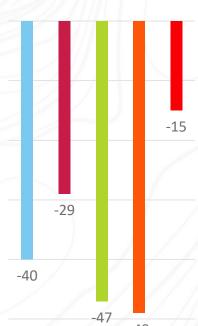
Buses are carrying the maximum allowed number of passengers under Covid restrictions



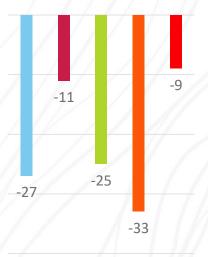
The limits on the maximum allowed number of passengers are returned to those before the pandemic

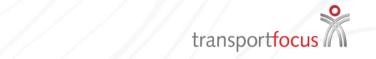


Seating restrictions are removed and passengers who you do not know are allowed to sit next to you



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



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

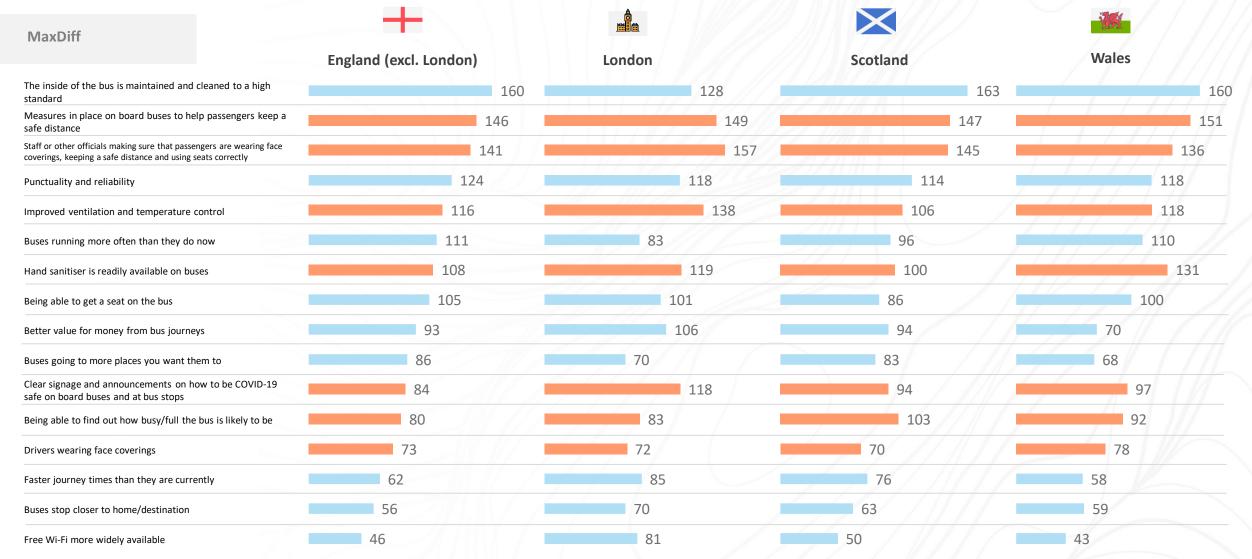
Regular bus priorities					COVID related priorities				
					147	117	,	1	109
161	112	93		86	Measures in place on board buses				
The inside of the bus is maintained and cleaned to a	Buses running more often than they do now	Better value for money from bu journeys		Buses going to more places you want them to	to help passengers keep a safe distance (e.g. reduced numbers of passengers, notices on seats, seats blocked off, floor markings)	Improved ventilation temperature cont			itiser is readily le on buses
high standard				- -					
				57	142	85			
		62		stop closer to e/destination		Clear signage and	8	1	
125	105	Faster journey times than		46	Staff or other officials making sure that passengers are wearing face coverings (unless exempt),	announcements on how to be COVID-19 safe on	Being abl	le to find busy/full	74
Punctuality and reliability (buses arriving on time)	Being able to get a seat on the bus	they are currently	Free V	Vi-Fi more widely available	keeping a safe distance and using seats correctly	board buses and at bus stops	the bus is		Drivers wearing face coverings





And these 3 top priorities are the same in all nations, but slightly different in London where ventilation comes before cleanliness









For current users in England (outside London), although COVID-19 measures are important, ensuring punctuality and reliability of buses is crucial to ensure higher use

England (excl. London)

MaxDiff **Current users (reduced) Fully lapsed users** The inside of the bus is maintained and cleaned to a high standard 173 148 153 Measures in place on board buses to help passengers keep a safe distance 140 Staff or other officials making sure that passengers are wearing face coverings, keeping a safe 153 131 distance and using seats correctly 160 96 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 91 121 Being able to get a seat on the bus 101 Better value for money from bus journeys 87 108 68 Buses going to more places you want them to 82 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 83 Drivers wearing face coverings 73 53 Faster journey times than they are currently 65 50 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 convince while it will be easier to increase the use of Spring back Socialisers

England (excl. London)

Spring-Back

MaxDiff	England (excl. London)	Carrying on	Choosers	Affected	Spring-Back Socialisers	Rethinking Reducers
The inside of the bus is maintained and cleaned to a high standard	160	109	139	171	196	134
Measures in place on board buses to help passengers keep a safe distance	146	82	131	171	172	135
Staff or other officials making sure that passengers are wearing face coverings, keeping a safe distance and using seats correctly	141	77	121	170	164	140
Punctuality and reliability	124	125	75	138	154	90
Improved ventilation and temperature control	116	85	104	121	137	112
Buses running more often than they do now	111	117	76	122	130	86
Hand sanitiser is readily available on buses	108	84	105	111	112	130
Being able to get a seat on the bus	105	104	76	100	129	89
Better value for money from bus journeys	93	99	63	115	95	92
Buses going to more places you want them to	86	93	55	82	110	64
Clear signage and announcements on how to be COVID-19 safe on board buses and at bus stops	84	61	80	82	98	89
Being able to find out how busy/full the bus is likely to be	80	75	72	92	79	86
Drivers wearing face coverings	73	59	84	67	72	91
Faster journey times than they are currently	62	82	49	57	65	56
Buses stop closer to home/destination	56	75	51	47	55	62
Free Wi-Fi more widely available	46	70	36	37	43	56

Carefree and

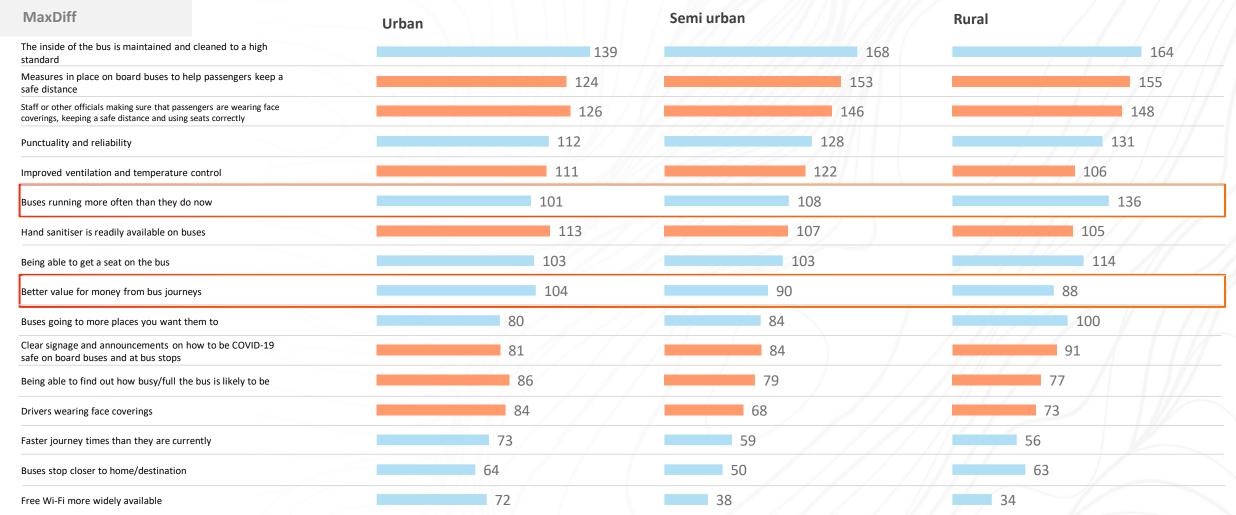
Cautious Car

Anxious and

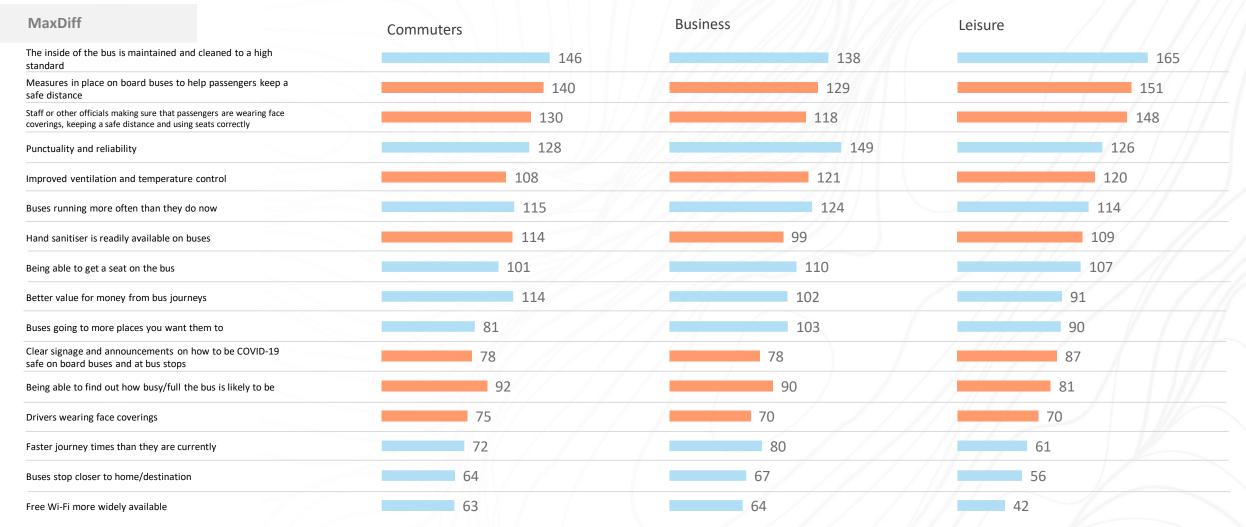




In rural areas, the increase of bus frequency and destinations are key in encouraging passengers to use the bus more often, while for urban users it is more about affordability

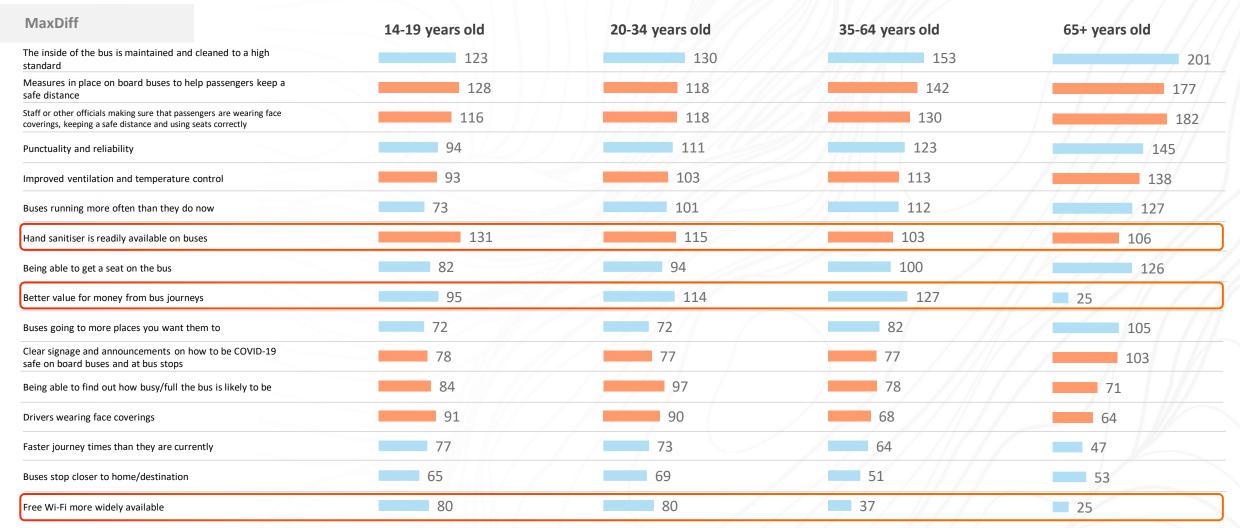


By journey type requirements differ somewhat and need to be responded to accordingly





The availability of hand sanitiser is what the younger bus users want to see the most, while value for money moves up the priority order for those aged 20 to 64, who are most likely to be fare-payers



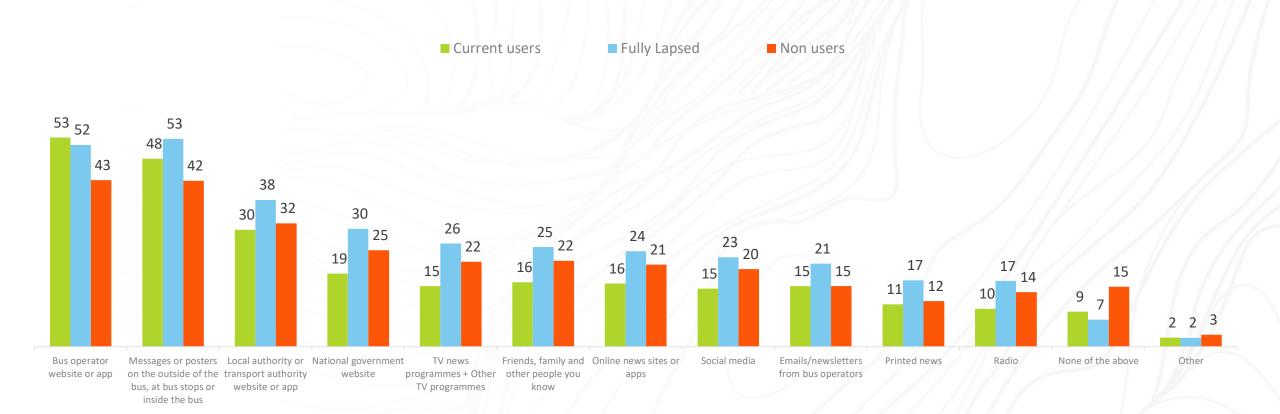




Apps, posters and websites from the bus operators are key media sources for all types of users

England (excl. London)

Media used for information about bus (%)



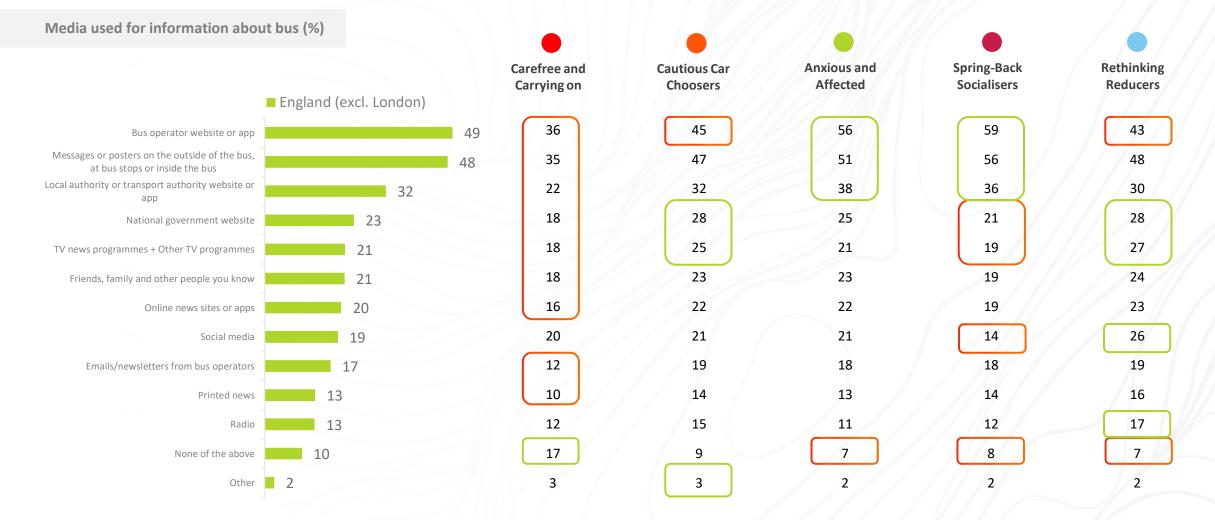
Though non-users generally have less trust in these forms of media relative to current and fully lapsed users

England (excl. London)

Media trusted for information about bus (%) Current users Fully lapsed users Non users 53 44 44 11 11 Bus operator website Messages on the Local authority or National government Emails/newsletters Friends, family and Online news sites or None of the above Social media Printed news outside of the bus + transport authority website from bus operators programmes + Other other people you or app apps Messages or posters website or app TV programmes at bus stops + Messages inside the



The Cautious, Affected and Rethinking Reducer segments are more likely 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

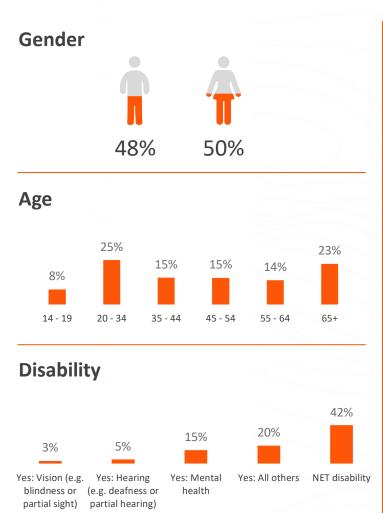


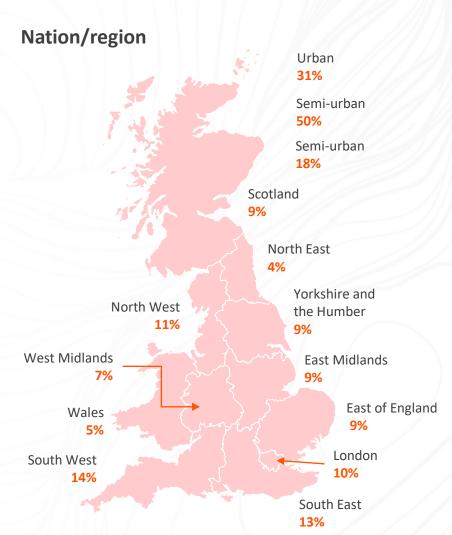


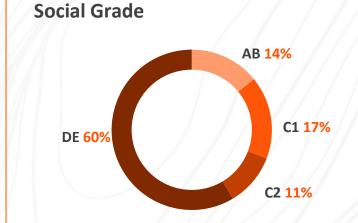


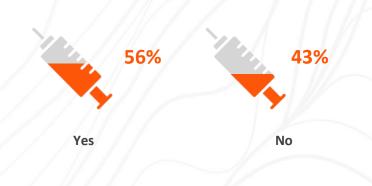
Demographics

Overall figures





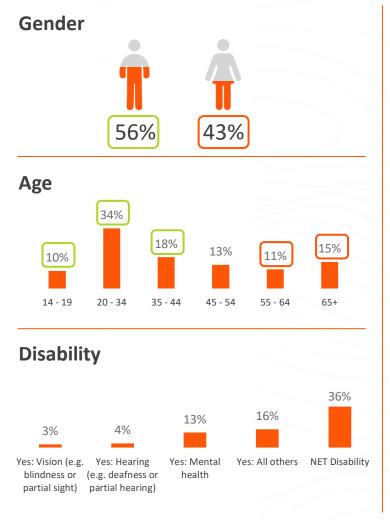


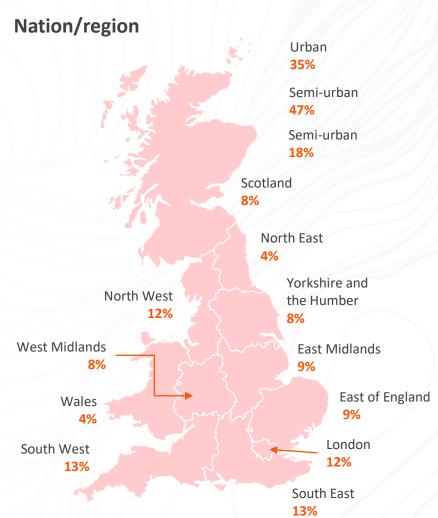


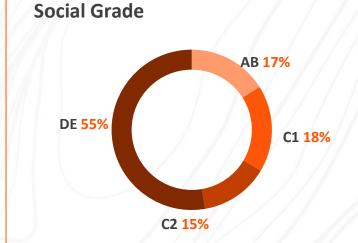


Demographics: Carefree and Carrying on

Overall figures





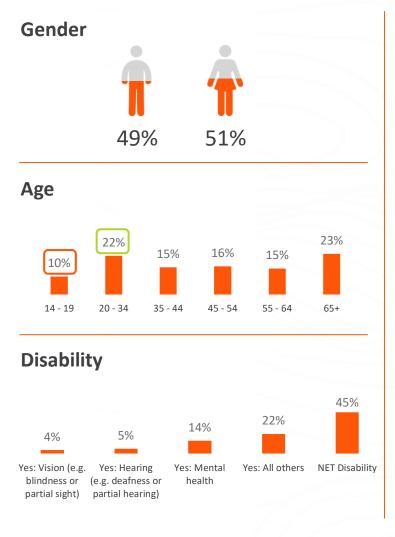


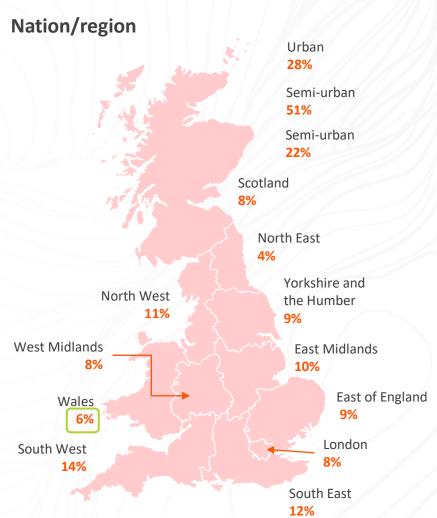


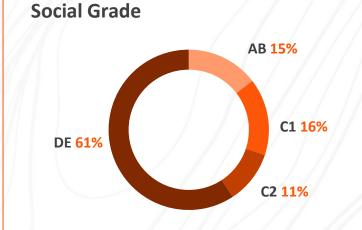


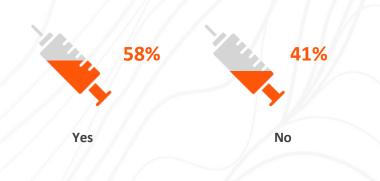
Demographics: Cautious Car Choosers

Overall figures





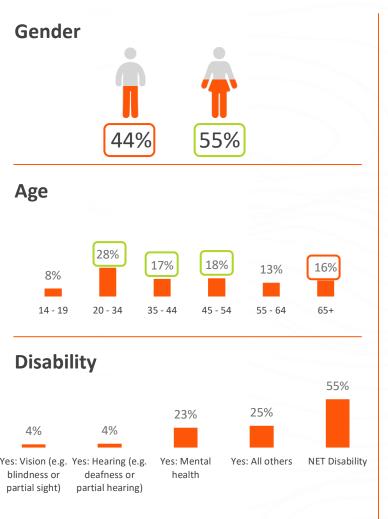


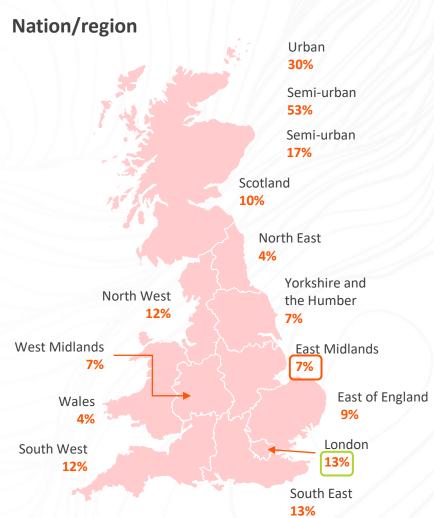


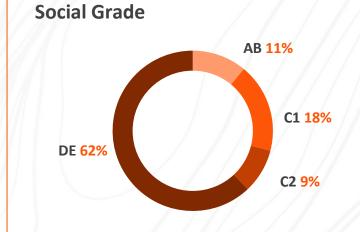


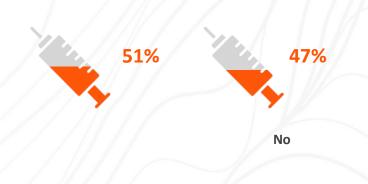
Demographics: Anxious and Affected

Overall figures





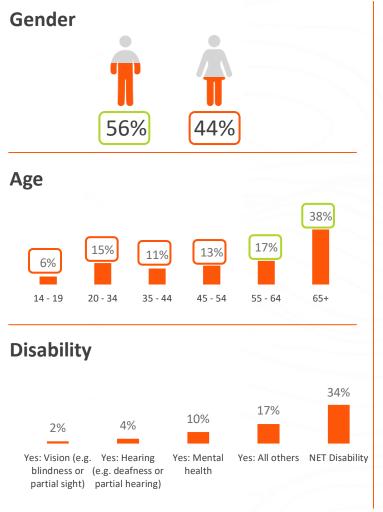


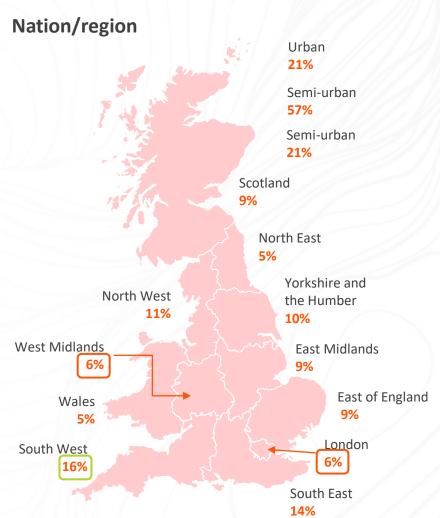


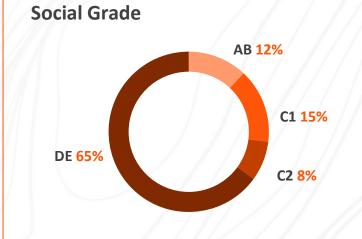


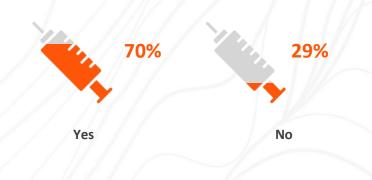
Demographics: Spring-Back Socialisers

Overall figures







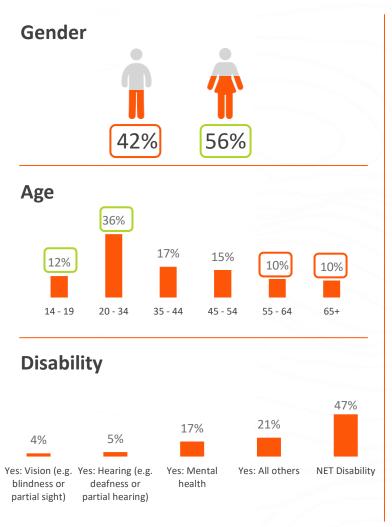


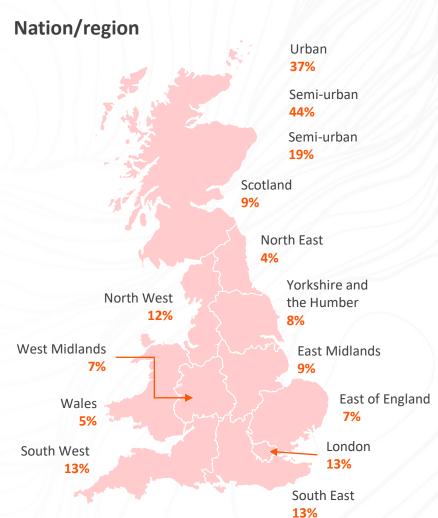


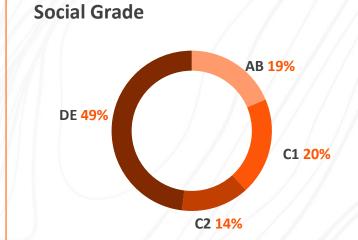


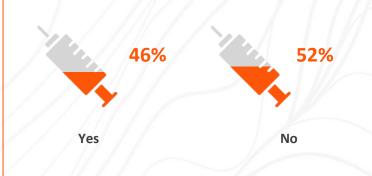
Demographics: Rethinking Reducers

Overall figures













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