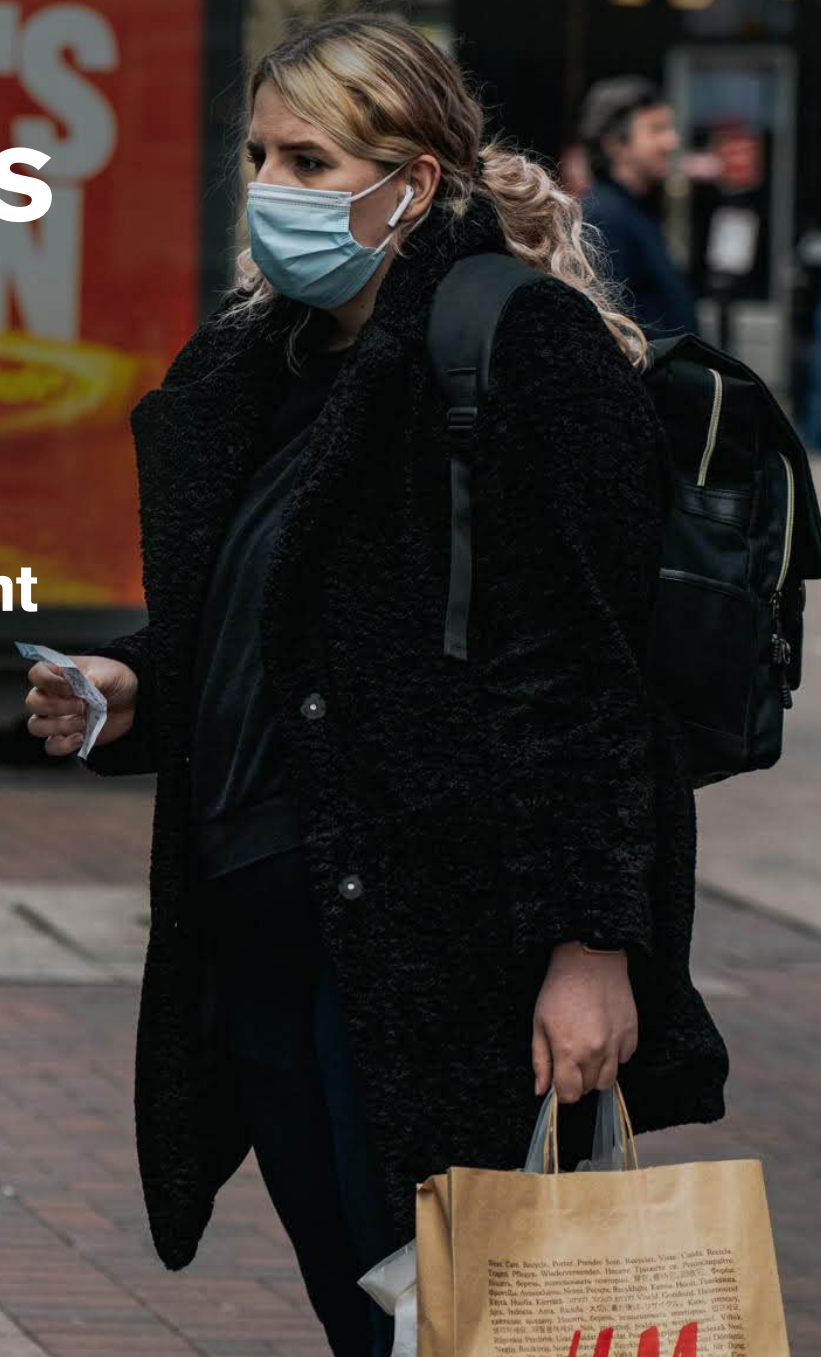


The route ahead: getting passengers back on buses

Findings from a major survey of current
and lapsed passengers and non-users

June 2021

transportfocus 





Summary

Transport Focus carried out an online survey in March and April 2021 into the views and experiences of over 10,000 current, fully lapsed and non-users about bus services in Great Britain. This looked at using buses during Covid-19, expected bus use once things go back to normal, satisfaction with services and priorities for increased use.

This report summarises the results of the survey for England (outside London). Further details, including the findings for London, Wales and Scotland and an analysis of the views of five distinct segments of the population can be found in the accompanying slide deck.

Bus use during Covid-19 and beyond

After a significant drop in spring 2020, bus use picked up during summer 2020 but then dropped back down over the following autumn and winter.

The final stage out of lockdown in England, with regards to large events being allowed and no legal limit on social contact, currently scheduled for late July, is not viewed solely as a particularly strong incentive for passengers to use the bus a lot more.

However, bus use has started to increase since we carried out the survey. By the end of the pandemic, when all restrictions related to Covid-19 are lifted and things return to normal, bus use is predicted to pick up to almost pre-pandemic levels with nearly all fully lapsed users back on the bus.

The experience of using the bus during the pandemic

Overall satisfaction with bus journeys during the pandemic was high at 83 per cent.

Most passengers who used the bus during the pandemic felt safe; 29 per cent felt very safe and 57 per cent fairly safe. Passengers' feeling of safety is closely related with how many other passengers were on the bus and 88 per cent of passengers say they have been travelling on buses that are not particularly busy.

The busier the bus, the lower the satisfaction. Satisfaction with fairly busy services was 68 per cent and satisfaction with services which were very busy to maximum capacity was just 47 per cent. Satisfaction is also closely linked with passengers' experience of being able to board their first bus. For those who did not have an issue, satisfaction was 91 per cent.

The safer passengers feel, the more satisfied they are. 97 per cent of passengers who felt very safe were satisfied, whereas only 33 per cent of those who felt not very safe were

satisfied. Just 17 per cent of those who felt very unsafe were satisfied.

Passenger satisfaction with specific elements of their journeys was consistently lower than overall satisfaction. The pandemic resulted in fewer passengers taking the bus which made it easier to get a seat. This therefore was the highest rating for satisfaction at 81 per cent. The lowest rating for satisfaction was passengers being able to find out earlier about when buses were busy or full at just 42 per cent.

Attitudes of fully lapsed and non-users to bus use during the Covid-19 pandemic

Fully lapsed and non-users are generally not very relaxed about taking the bus with almost half saying they are anxious. Fully lapsed passengers gave a number of reasons for not using the bus anymore, highlighting concerns about catching or spreading Covid-19 or the need to follow Government guidelines. Non-users' top reason for not using the bus since March 2020 was that travelling by another mode was more convenient. Although they

shared the same concerns about Covid-19 as lapsed users, they also highlighted other concerns with bus travel. This included that the overall journeys take too long, that buses were too infrequent, too unreliable, too crowded/difficult to get a seat, poor value for money when travelling with others and they had no bus services close to where they live or where they want to go.

While Covid-19 is still present, these two groups would like to see a number of measures in place to minimise the spread of the virus. In particular the availability of hand sanitiser on board, daily deep cleaning of buses, running enough services to avoid crowding, enforcing passengers to wear face coverings (unless exempt) and improving ventilation to ensure fresh air during the journey.

A better understanding of what is already in place on the buses is needed, as 48 per cent of non-users and 36 per cent of fully lapsed users are unaware of the measures that have been implemented.

Priorities for increased bus use

The top priorities for increased bus use for current passengers who had reduced their bus use, and for lapsed users, were:

1. clean and well-maintained buses
2. measures to help passengers keep a safe distance from each other
3. the enforcement of wearing face coverings (except for those who are exempt).

The traditional bus passenger priorities, such as improved punctuality, frequency, value for money and seat availability were also ranked towards the top.

Ticket discounts and special offers will encourage a large share of lapsed users to use the bus more than now, especially the younger ones. Half of lapsed users agreed that special ticket offers would encourage them to use the bus more and a third agreed that they would return to using the bus sooner if their first trip were at a reduced price.

Communicating with users and non-users

When seeking information about bus services and the measures being taken to ensure safer travel during Covid-19, current users are most likely to use bus operator websites, apps or posters outside or inside the bus and at bus stops. Fully lapsed users and non-users are also likely to use local authority or local transport authority websites or apps.

User and non-user views since April 2021

The more recent research we have conducted has confirmed that the views of users, lapsed users and non-users have not changed too much over the last two months.

Learning points and recommendations

Our recommendations and learning points were published as part of our earlier research and were based on those findings. They are confirmed by these survey findings and are listed in full at the end of this report.

Introduction



As part of our ongoing investigation of attitudes towards the impact of Covid-19 on bus services, we interviewed and held small group discussions with over 200 people during December 2020 and January 2021. Our findings and recommendations were published in April in *The route ahead: getting passengers back on buses.*



We report here the findings of our latest survey and draw out the implications for the bus industry.

We indicated that we would be following up this in-depth research with a major survey of people who have carried on using buses during the pandemic, those who have stopped doing so and those who rarely use buses. We report here the findings of that survey and draw out the implications for the bus industry.

In doing so, we recognise that we are in a fast-moving, unpredictable environment. Since we conducted the research, in late March and early April 2021, we have passed two key milestones in the Government's roadmap for easing lockdown restrictions in England. On 12 April, rules were relaxed in relation to non-essential shops, gyms and hairdressers and the outdoor areas of pubs, cafes and restaurants. On 17 May, most social contact was allowed outdoors, restrictions on outdoor sporting events and indoor hospitality and entertainment were relaxed and changes were made to foreign travel rules. At the same time, bus operators in England increased the number of passengers allowed on each bus, which had previously been restricted to maximise social distancing. Over the last two to three months, the vaccine programme has significantly increased the

proportion of adults who have received at least one dose of protection against Covid-19. A final removal of restrictions is planned for 19 July. We have continued to research and report on the views of bus passengers and non-users throughout May and June 2021 through a weekly tracker survey, supported by additional, more detailed studies.

We want to continue to help the bus industry gear up for the final removal of restrictions by understanding the anxieties of those who may be returning to the bus after a lengthy absence, putting in place the measures would-be passengers expect and communicating effectively what the industry has done to make people feel safe. This report outlines what we think is needed.

Methodology

The research was carried out for Transport Focus by research agency, BVA BDRC. It consisted of an online survey carried out between 22 March and 12 April 2021.



7663 people from England (outside London) responded to the survey.

To qualify, respondents had to live in Great Britain and be aged 14 or older. Data was weighted by age, gender, region and user type to ensure that it was nationally representative.

A total of 10,335 people responded to the survey. This broke down as follows:

- 5547 current users: any respondent who had used buses at least once since the restrictions related to the Covid-19 pandemic were introduced
- 2792 fully lapsed users: any respondent who used buses at least once every three months before the pandemic, but not since, and did not reject using buses in future
- 1996 non-users: any respondent who used buses less than once every three months, or not at all, before the pandemic, and not since, and did not reject using buses in future.

The sample sizes achieved for each of the different parts of Great Britain were as follows:

- 7663 in England (excluding London)
- 502 in London
- 1189 in Wales
- 981 in Scotland.

We are grateful to the Scottish and Welsh governments for providing funding to boost the scale of the research in their nations.

Segmentation

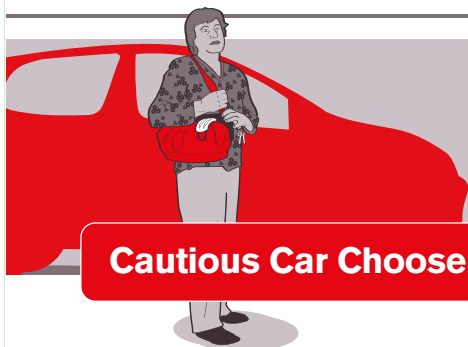
We analysed the findings against the five segments that Transport Focus has developed in recent months.



Rethinking Reducers



Carefree and Carrying on



Cautious Car Choosers

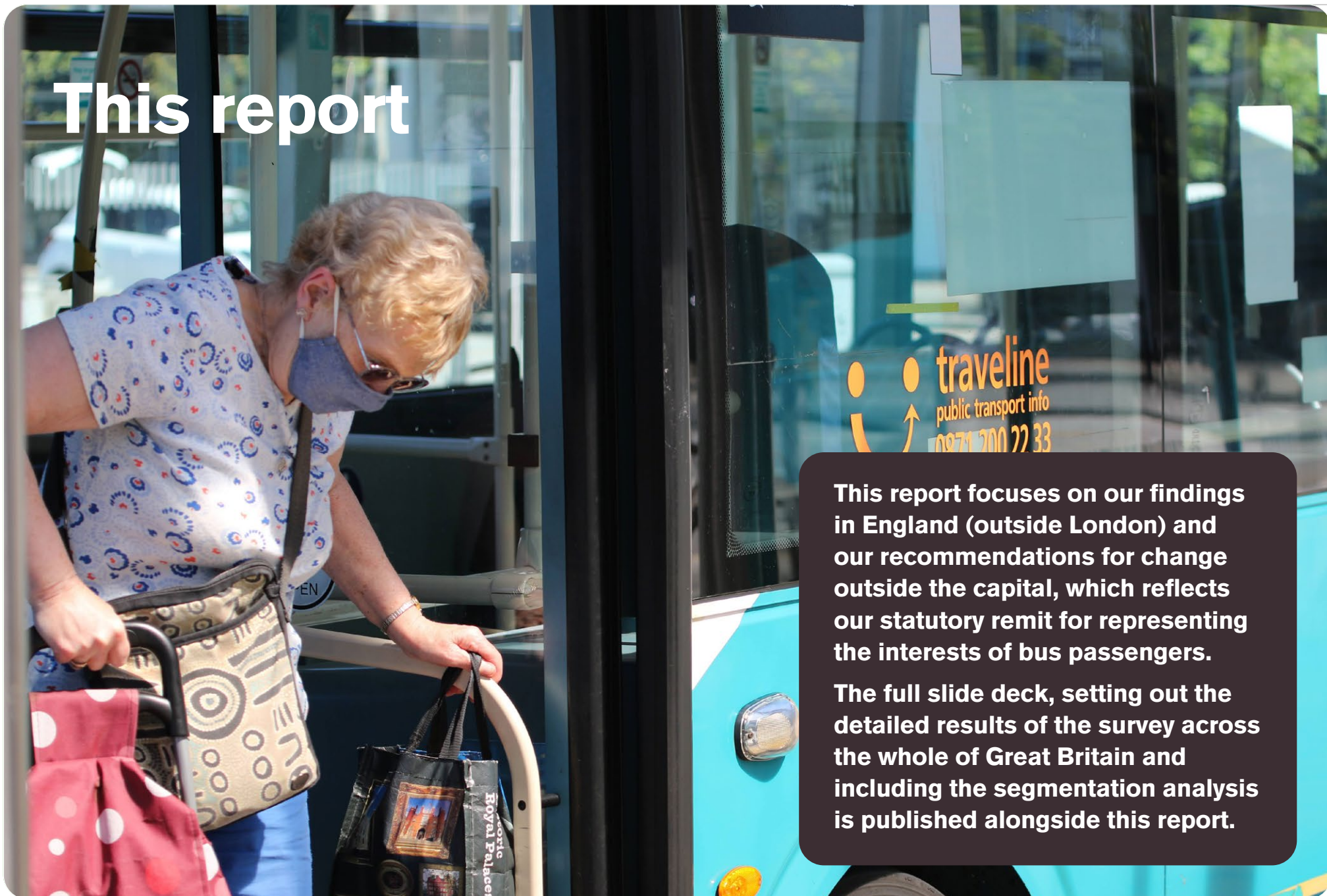


Anxious and Affected



Spring-Back Socialisers

This report



This report focuses on our findings in England (outside London) and our recommendations for change outside the capital, which reflects our statutory remit for representing the interests of bus passengers.

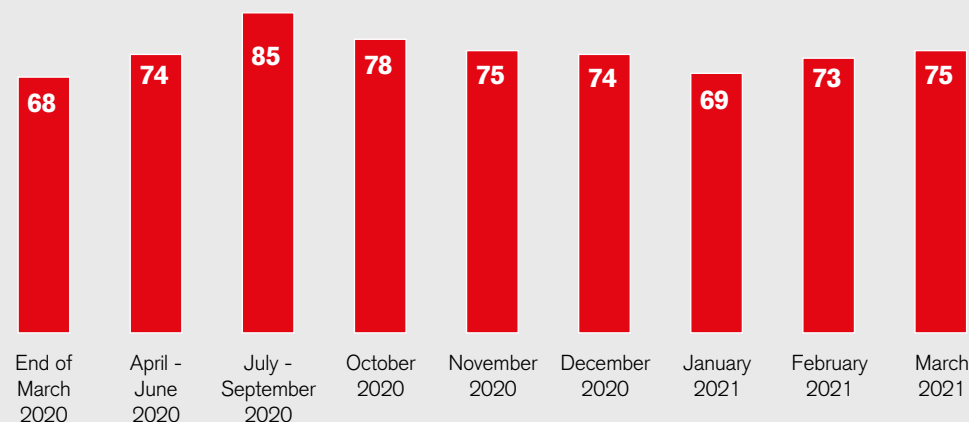
The full slide deck, setting out the detailed results of the survey across the whole of Great Britain and including the segmentation analysis is published alongside this report.

Bus use during Covid-19



After a significant drop in spring 2020, bus use picked up during summer 2020. However it dropped again over the following autumn and winter. The chart below shows the proportion of those who continued using the bus during the pandemic. 85 per cent of these users travelled by bus at some point between July and September 2020.

Proportion of current users travelling by bus in each period (%)

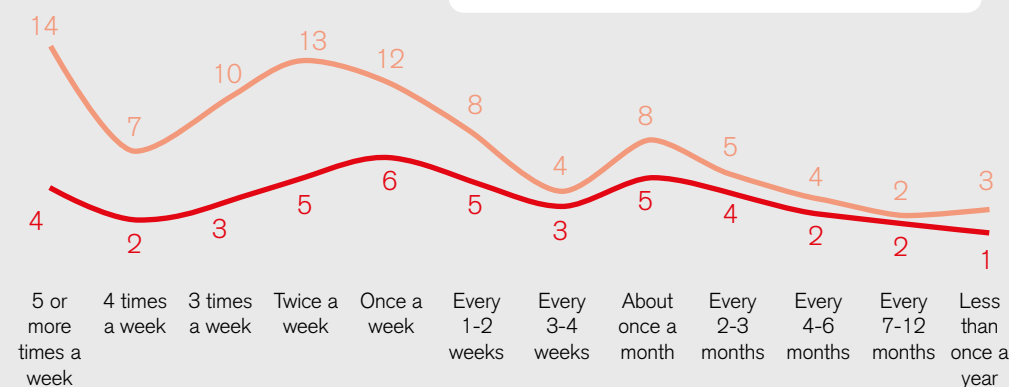
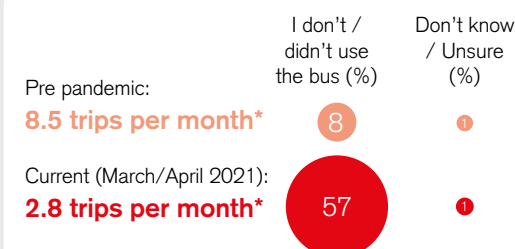


Q2_2. When did you travel by bus and how frequently within that time period?
Base = 5,547

Overall bus use decreased by around two thirds by March/April 2021 in comparison to pre-Covid levels. The average number of trips per month dropped from 8.5 to 2.8. Very frequent use was most impacted by the pandemic.

Frequency of bus usage (%)

Pre pandemic
Current (March/April 2021)

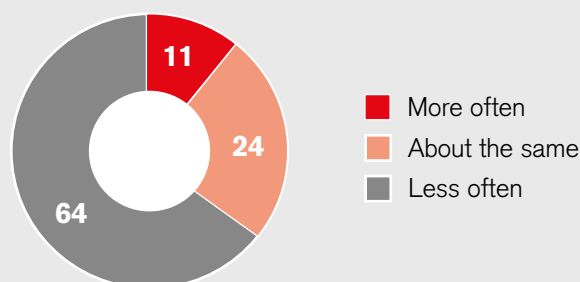


S9: Thinking about the time before the first coronavirus lockdown started in March 2020, how often did you usually travel by bus? Again, please exclude any coach services. S11: How often do you currently use the bus?
Base All respondents = 7,663

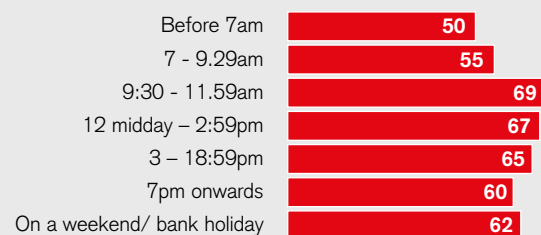
*Average number of trips per month is calculated by assigning a value to each of the time values which reflects their overall value relative to a month. Then an average is taken of these. Note: non users could have very low frequency of use pre-pandemic (less than every three months).

The biggest changes in frequency of bus use for passengers who continued using buses during the pandemic were for those who tend to travel during the period between the traditional 'peaks', namely 9.30-14.59. This was down by two thirds. Travel in the morning peak was down by only just over half.

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



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



Q3_5: Thinking about how frequently you have used the bus since the start of the first lockdown in March 2020, is that more or less often than previously? Base Before 7am n=285, 7-9:29 n=1,106, 9:30-11:59 n=1,963, 12:00-14:59 n=1,396, 15:00-18:59 n=1,197, 7pm onwards n=311, Weekend/bank holiday n=518

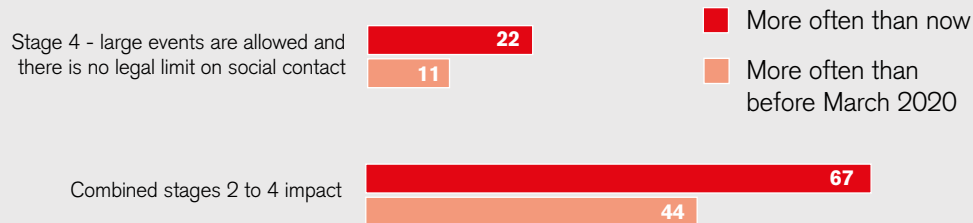


Returning to the bus as rules are relaxed or removed



In stages two and three of the relaxation of Covid-19 rules in England, the opening up of non-essential shops, pubs, cafes and restaurants and the opportunity to meet people indoors again were seen as the main factors which would be likely to increase bus use. The final stage out of lockdown in England, with regards to large events being allowed and no legal limit on social contact, scheduled for late July is not viewed, in and of itself, as a particularly strong incentive for passengers to use the bus a lot more.

Will travel more than now (%)

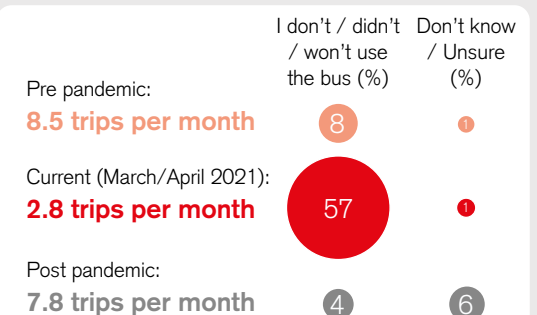
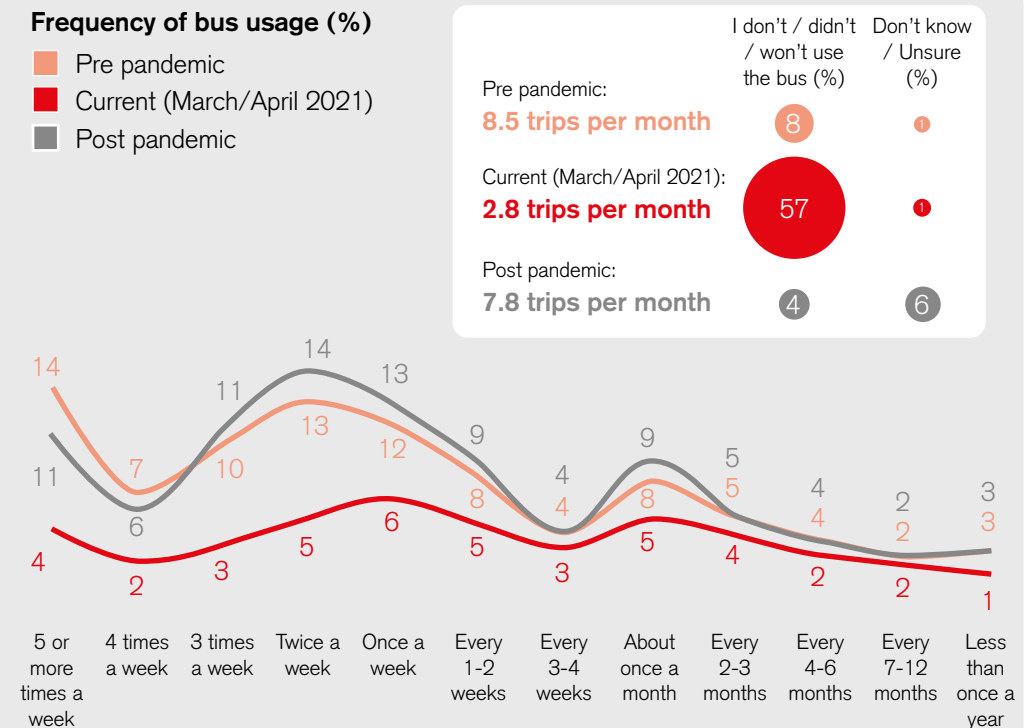


Q5_1. Which, if any, of the following changes will encourage you to use the bus more often than you do now? And which, if any, would encourage you to use the bus more often than you did before the COVID restrictions in March 2020? Base n= 4,958

However, by the end of the pandemic, when all restrictions related to Covid-19 have been lifted and things have returned to normal, bus use is predicted to pick up to almost pre-pandemic levels with nearly all fully lapsed users back on the bus. But the situation remains fluid.

Frequency of bus usage (%)

- Pre pandemic
- Current (March/April 2021)
- Post pandemic



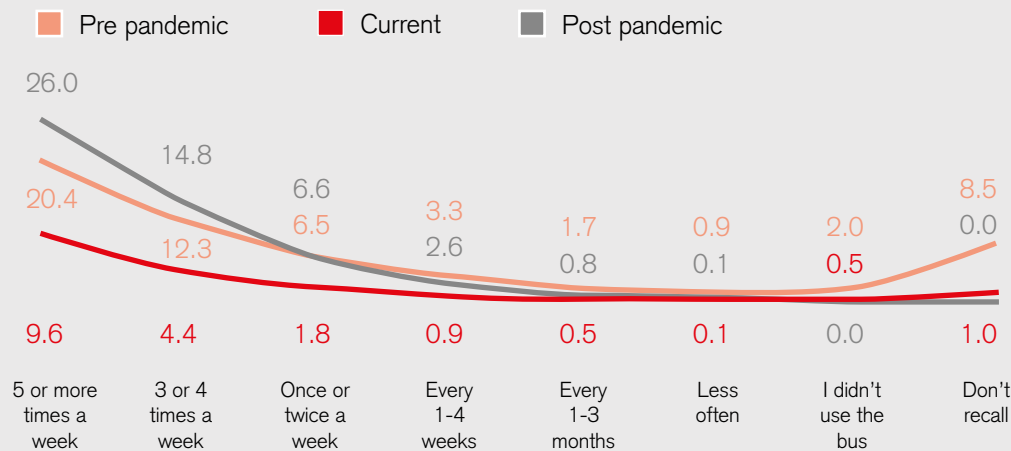
S9: Thinking about the time before the first coronavirus lockdown started in March 2020, how often did you usually travel by bus? Again, please exclude any coach services. S7: And how often will you be traveling by bus when all restrictions related to COVID-19 have been lifted and things have returned to "normal"?

S11: How often do you currently use the bus?

Base All respondents = 7,663

While the most frequent pre pandemic users are planning to decrease their use post pandemic, the other groups are actually thinking about slightly increasing their use.

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



Difference in the average number of trips per month pre-pandemic to post pandemic

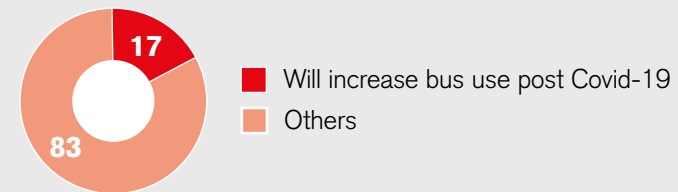


S9: Thinking about the time before the first coronavirus lockdown started in March 2020, how often did you usually travel by bus? Again, please exclude any coach services.

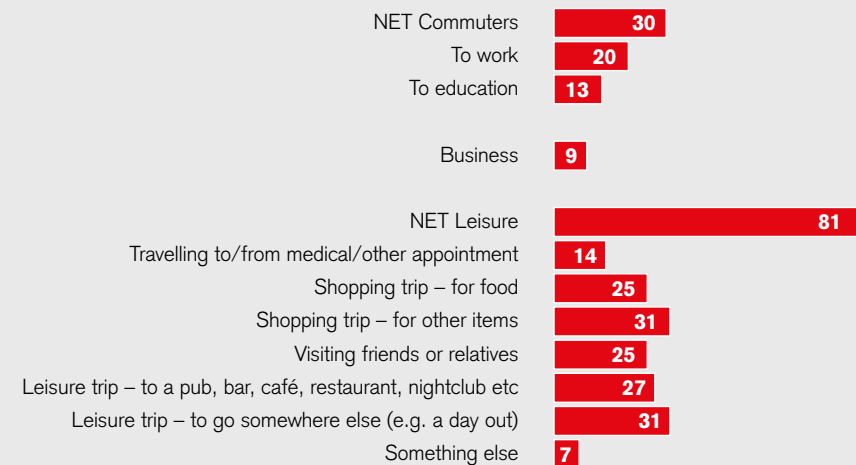
S7: And how often will you be traveling by bus when all restrictions related to Covid-19 have been lifted and things have returned to "normal"?

S11: How often do you currently use the bus? 5 times or more a week n= 1,238, 3 or 4 times a week n=1,411, Once or twice a week n=1,765, Every 1 to 4 weeks n= 797, Every 1 to 3 months n=777, Less often n= 598, I didn't use the bus n= 592, Don't recall n=65

Leisure trips (non-commuting/business 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.



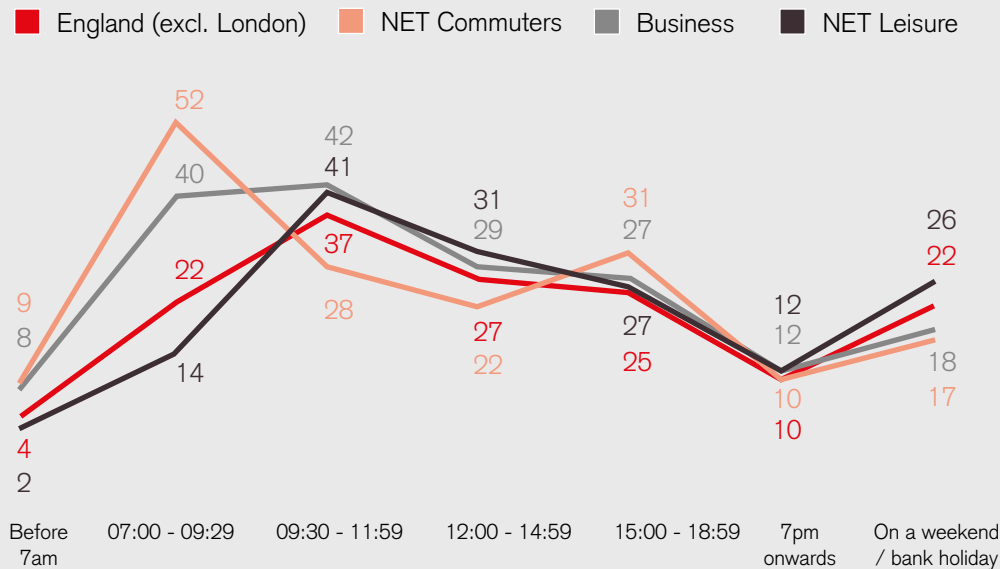
Trip type amongst those increasing bus use post Covid-19 (%)



Q8. You have mentioned that you will increase the frequency of your bus use from [pipe: S9 lower] to [pipe: S7 lower] when all restrictions related to Covid-19 have been lifted and things have returned to "normal".
Base n= 1,378

The most popular time slot for additional journeys is between 9.30-11.59, driven by leisure travellers, while additional commuter journeys will be heavily concentrated on the morning peak.

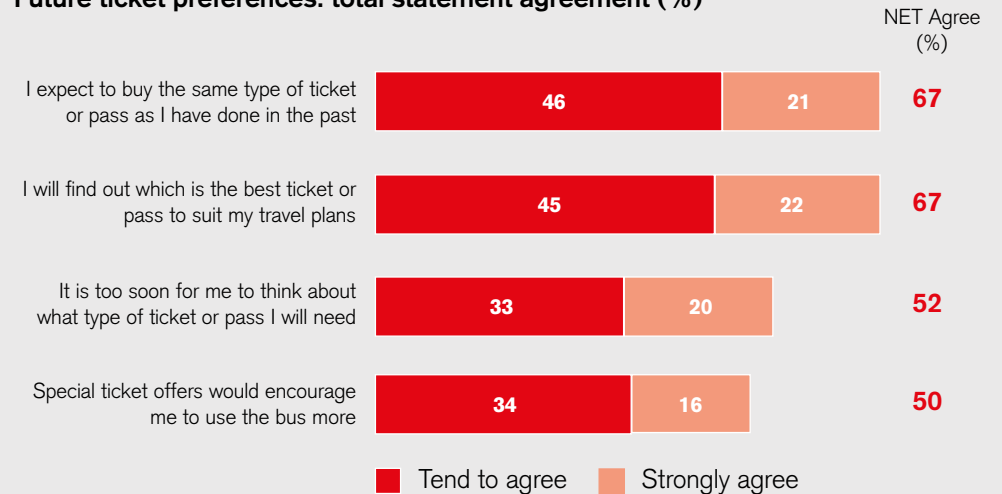
Time of trip amongst those increasing bus use post Covid-19 (%)



Q9. And when do you expect to make these extra journeys? Base n=1,378, Commuters = 465, Business = 129, Leisure = 1,084

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

Future ticket preferences: total statement agreement (%)



Q5_6. And how much do you agree or disagree with the following statements about tickets, for when you return to travelling by bus? Base n=1,340



**The experience
of using the
bus during the
pandemic**

The social distancing rules introduced during the Covid-19 pandemic resulted in bus operators significantly reducing the number of passengers each bus was allowed to carry. (In England, the maximum number allowed was significantly increased in May 2021, after our research was completed). Those travelling during the earlier part of the day were significantly more likely to have a busy bus. Only around half of those travelling before 7am or between 7 and 9.29am were able to catch the first bus every time.

NET Busy bus (%)

England (excl. London)	12
Before 7am	18
07:00 - 09.29	15
09:30 - 11.59	10
12:00 - 14:59	11
15:00 - 18:59	14
7pm onwards	12
On a weekend/ bank holiday	11

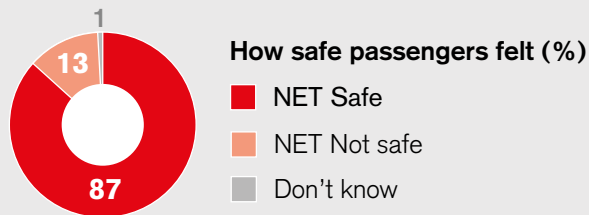
Ability to catch the first bus all the time (%)

England (excl. London)	62
Before 7am	48
07:00 - 09.29	51
09:30 - 11.59	69
12:00 - 14:59	68
15:00 - 18:59	62
7pm onwards	62
On a weekend/ bank holiday	67

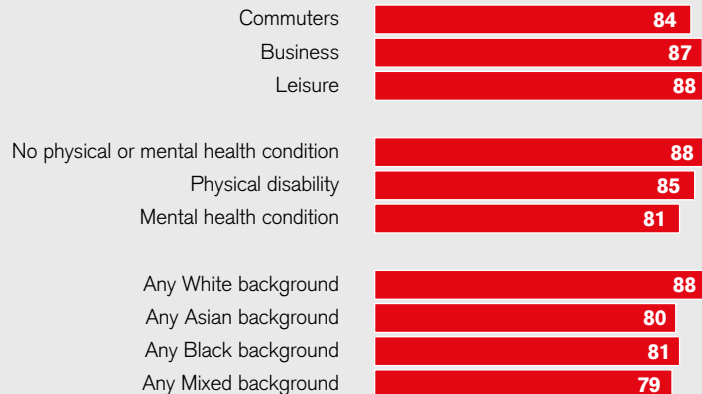
Q2_9: And how busy have the buses been when making your journeys? / Q2_10: Still thinking about your overall experience of taking the bus since March 2020, how often were you able to board the first bus for the route you were catching that arrived at your stop ? Base Before 7am n=285, 7-9:29 n=1,106, 9:30-11:59 n=1,963, 12:00-14:59 n=1,396, 15:00-18:59 n=1,197, 7pm onwards n=311, Weekend/bank holiday n=518



Most passengers who used the bus during the pandemic felt safe: 29 per cent felt very safe and 57 per cent fairly safe with the number feeling fairly unsafe at just 10 per cent and very unsafe 2 per cent. Passengers' feeling of safety is closely related to how many other passengers were on the bus - 88 per cent of passengers have been travelling on buses that are not particularly busy.



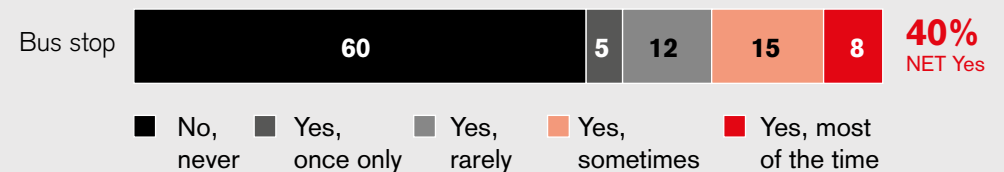
NET Safe (%)



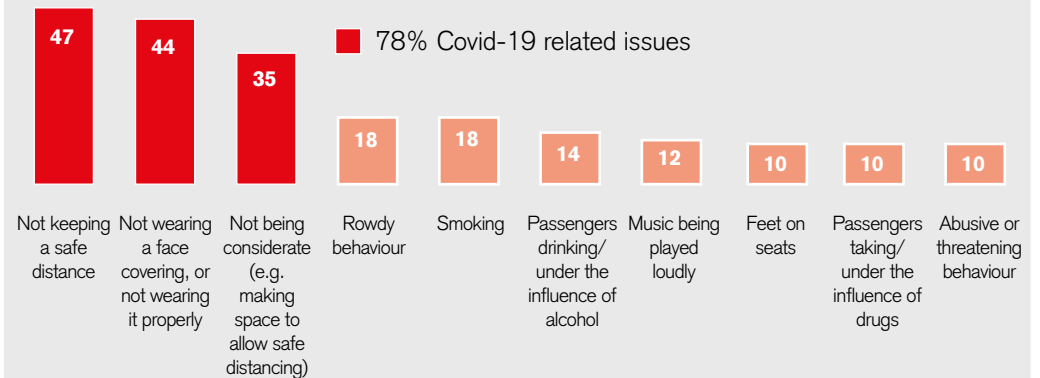
Q2_6: Thinking about COVID-19, how safe did you generally feel during your bus journey/s?
Current users n=4,498, No conditions n=2,665, Physical disability n=940, Mental health conditions n=814, White n=3,855, Black n=124, Asian n=210, Mixed n=118, Commuters n=1782, Business n=402, Leisure n=3598

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

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



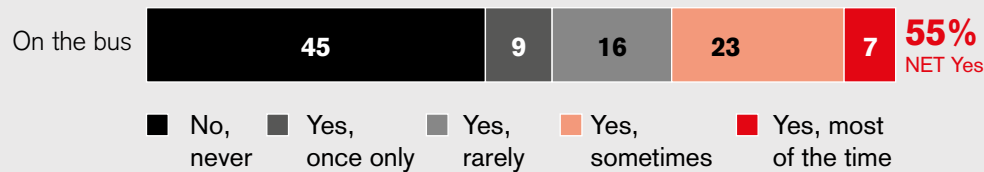
Reasons for feeling worried/uncomfortable (%)



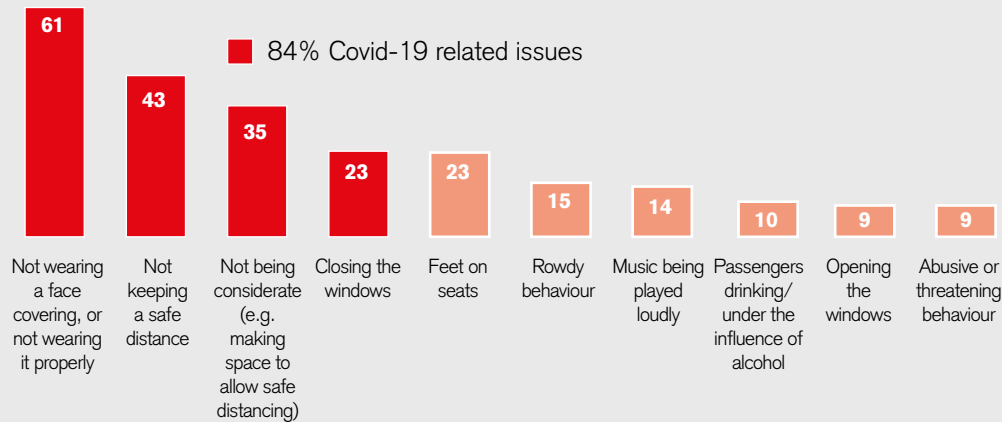
Q2_11c: X- Did other passengers' behaviour give you cause to worry or make you feel uncomfortable during your bus journey(s) since March 2020? / Q2_12: Which of the following were reason(s) for this? Base Current users n= 4,498, Current users that felt worry n=1,843

Over half of passengers felt worried or uncomfortable on board the bus at some stage over the past year, with 84 per cent of them associating this with Covid-19 related behaviour.

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



Reasons for feeling worried/uncomfortable (%)



Q2_11c: X- Did other passengers' behaviour give you cause to worry or make you feel uncomfortable during your bus journey(s) since March 2020? / Q2_12. Which of the following were reason(s) for this? Base Current users n=4,498, Current users that felt worry n=2,485



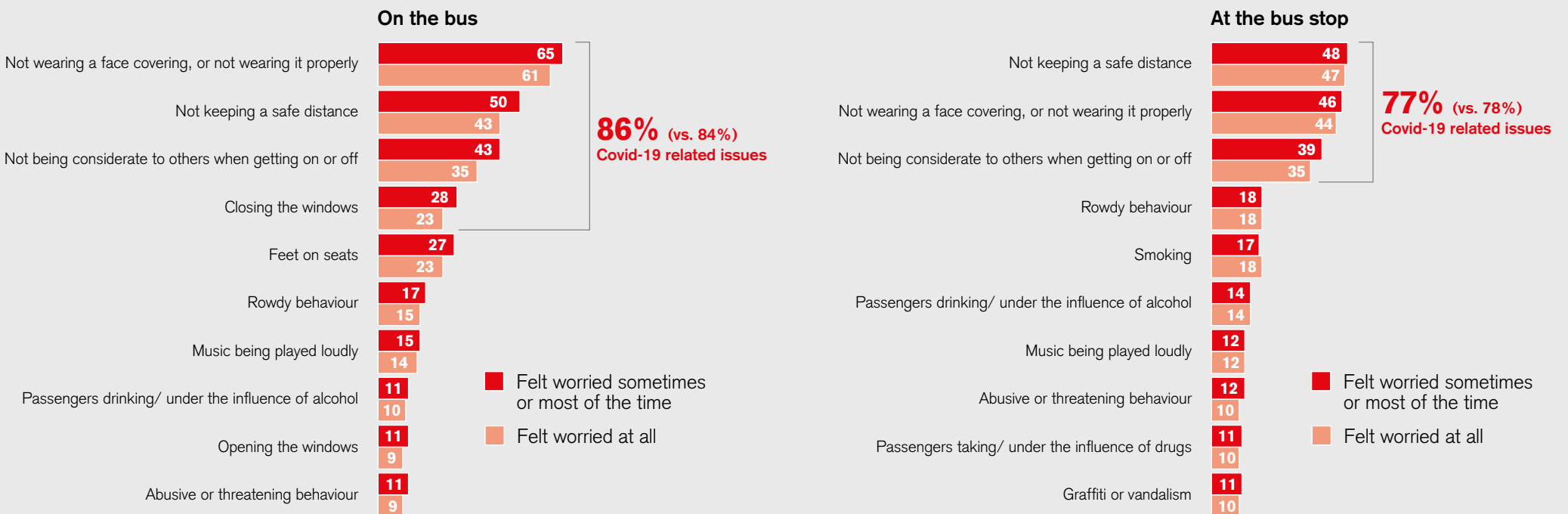
The three main reasons why passengers sometimes felt worried or uncomfortable were about other passengers:

1. not wearing a face covering/not wearing it properly
2. not keeping a safe distance

3. not being considerate to others when getting on and off.

Those who were concerned or worried on a more frequent basis (sometimes or most times) picked out the same Covid-19 related issues to a slightly greater extent, implying that these are recurring issues.

Reasons for feeling worried/uncomfortable (%)

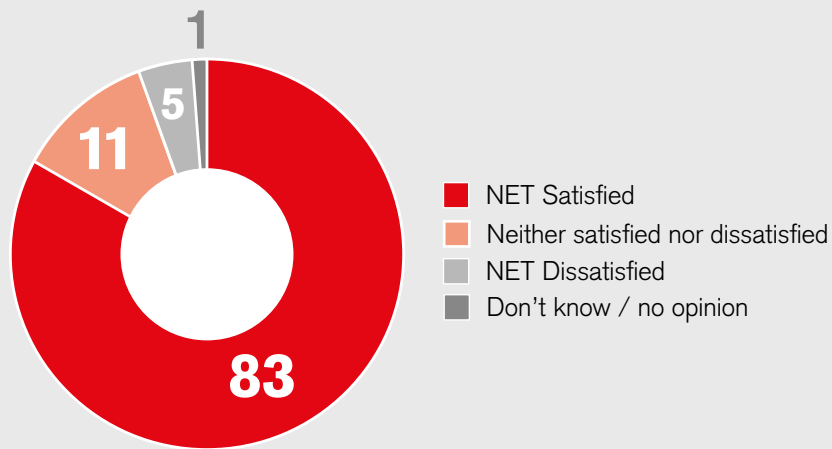


Q2_12. Which of the following were reason(s) for this? Felt worried on bus England (excl. London) n=2,485, Felt worried at bus stop England (excl. London) n=1,842, Felt worried at least sometimes on bus England (excl. London) n=1,362, Felt worried at least sometimes at bus stop England (excl. London) n=1,063

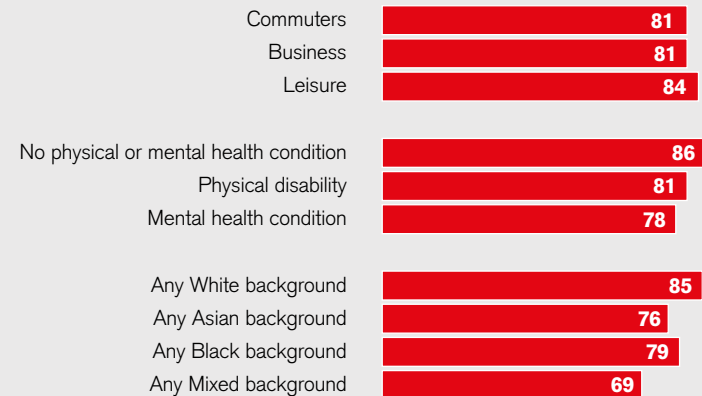
Overall satisfaction with bus journey(s) during the pandemic was high. England (outside London) scored 83 per cent which was slightly lower than the 89 per cent recorded in our last Bus Passenger Survey (BPS) carried out in autumn 2019. However, the difference may simply reflect a change in the methodology

used. BPS asks only about satisfaction with the current journey, which people tend to score higher, whereas our new survey asked about their overall experience of travelling by bus since March 2020.

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



NET Satisfied (%)

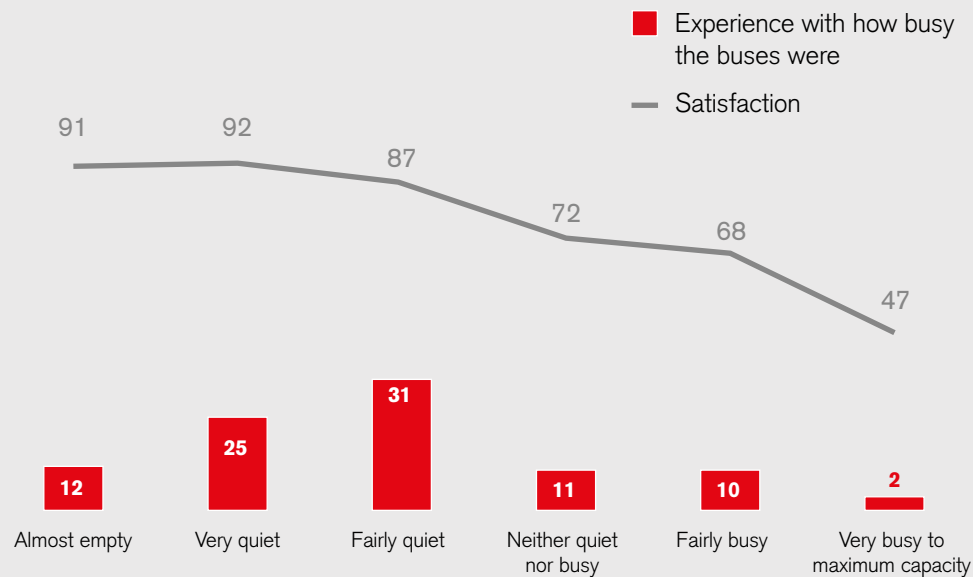


Q2_7: Taking into account your overall experience of travelling by bus since March 2020, how satisfied were you with your bus journey/s? Current users n=4,498, No conditions n=2,665, Physical disability n=940, Mental health conditions n= 814, White n=3,855, Black n=124, Asian n=210, Mixed n=118, Commuters n=1782, Business n=402, Leisure n=3598

There is a clear correlation between satisfaction and how busy the bus was - the busier the bus, the lower the satisfaction. Satisfaction with fairly busy services was 68 per cent and satisfaction with services which were very busy or

at maximum capacity was just 47 per cent. Satisfaction is also closely linked with passengers' experience of being able to board their first bus. For those who did not have an issue satisfaction was 91 per cent.

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



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 =4,498, Almost empty n=522, Very quiet n=1,117, Fairly quiet n=1,555, Neither nor n=510, Fairly busy n=449, Very busy to max capacity n=179

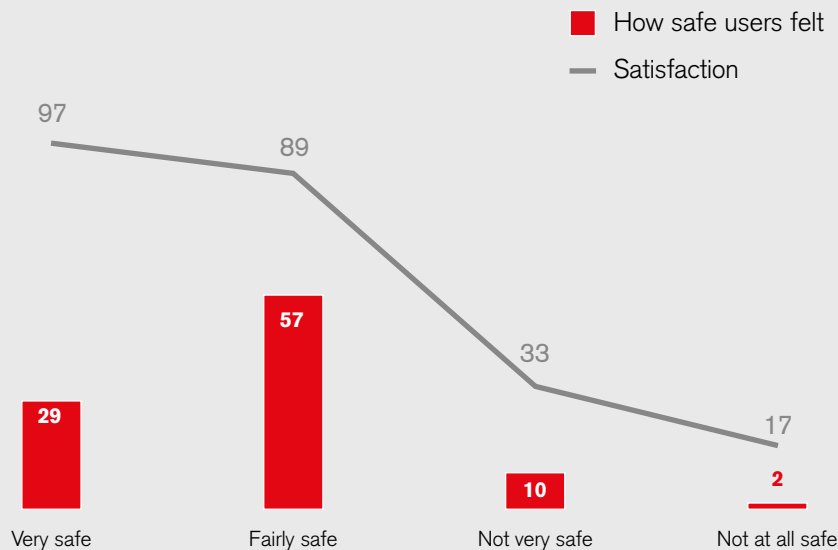
Satisfaction based on experience with being able to board the first bus (%)



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 =4,498, All the time n=2,735, Most of the time n=1,150, Some of the time n=377, Never to occasionally n=137

During Covid-19, feeling safe almost matches the levels of satisfaction as these metrics are closely connected. 97 per cent of passengers who felt very safe were satisfied, whereas only 33 per cent of those who felt not very safe were satisfied. Just 17 percent of those who felt very unsafe were satisfied.

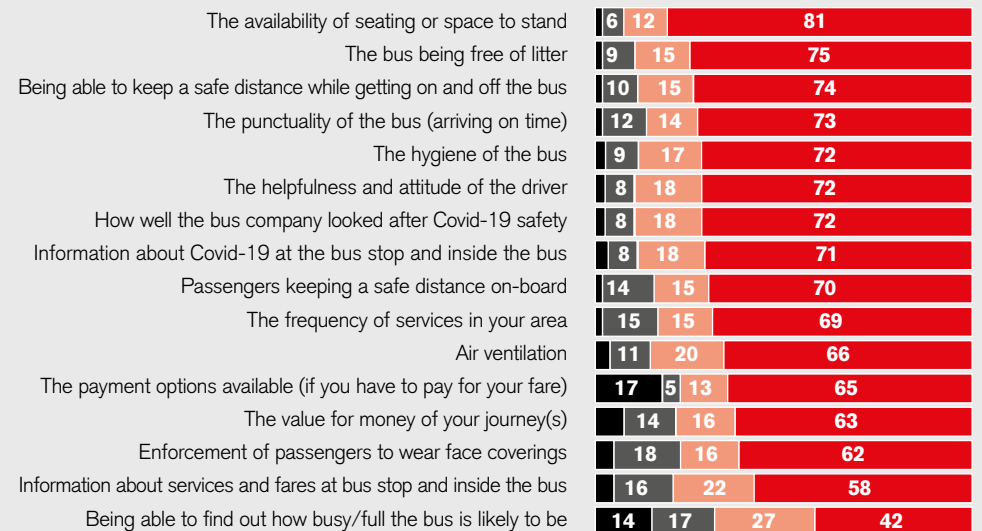
Satisfaction based on how safe passengers felt (%)



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? Base =4,498, Very safe n=1,303, Fairly safe n= 2,581, Not very safe n=469, Not safe at all n=105

Passenger satisfaction with specific elements of their journeys was consistently lower than overall satisfaction. The impact of the pandemic was such that fewer passengers took the bus, making it easier to get a seat, which may explain why this topped the specific satisfaction rating at 81 per cent. Passengers ranked being able to find out in advance when buses were busy or full the lowest for satisfaction at just 42 per cent.

Detailed satisfaction (%)



■ Don't know / no opinion ■ NET Dissatisfied ■ Neither satisfied nor dissatisfied ■ NET Satisfied

Q2_5. Thinking about your overall experience of taking the bus since March 2020, how satisfied were you with the following...? Current users n=4,498.

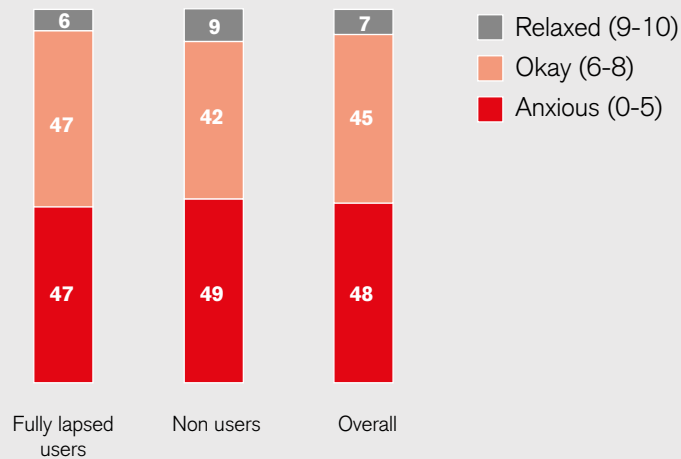
Attitudes of fully lapsed and non-users to bus use during the Covid-19 pandemic



Attitudes of fully lapsed and non-users to bus use during the Covid-19 pandemic

Fully lapsed and non-users were generally not very relaxed about taking the bus at the time we conducted the research with almost half saying they were anxious.

How relaxed those who are not current users about taking the bus now (%)



NET Relaxed (Relaxed - Anxious)



Fully lapsed user **-41**



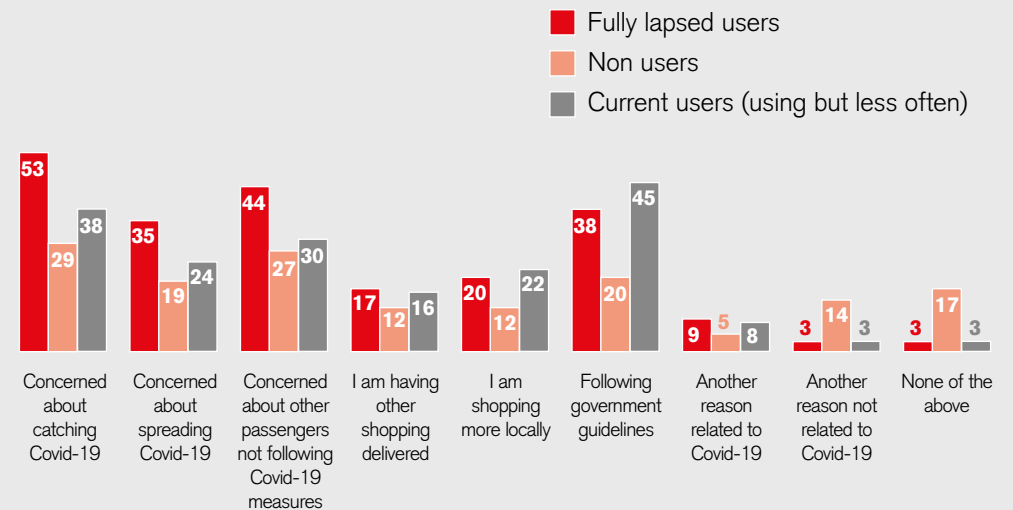
Non user **-40**

3.1 Thinking about the current situation regarding the Covid pandemic and the measures being taken to tackle it, including the vaccination programme, how would you feel about travelling by bus now?

Base = 3165, fully lapsed users = 1904, non-users = 1261

Fully lapsed passengers gave a number of reasons for not using the bus anymore, highlighting concerns about catching or spreading Covid-19 or the need to follow Government guidelines.

Covid related reasons for reducing or not using the bus since March 2020



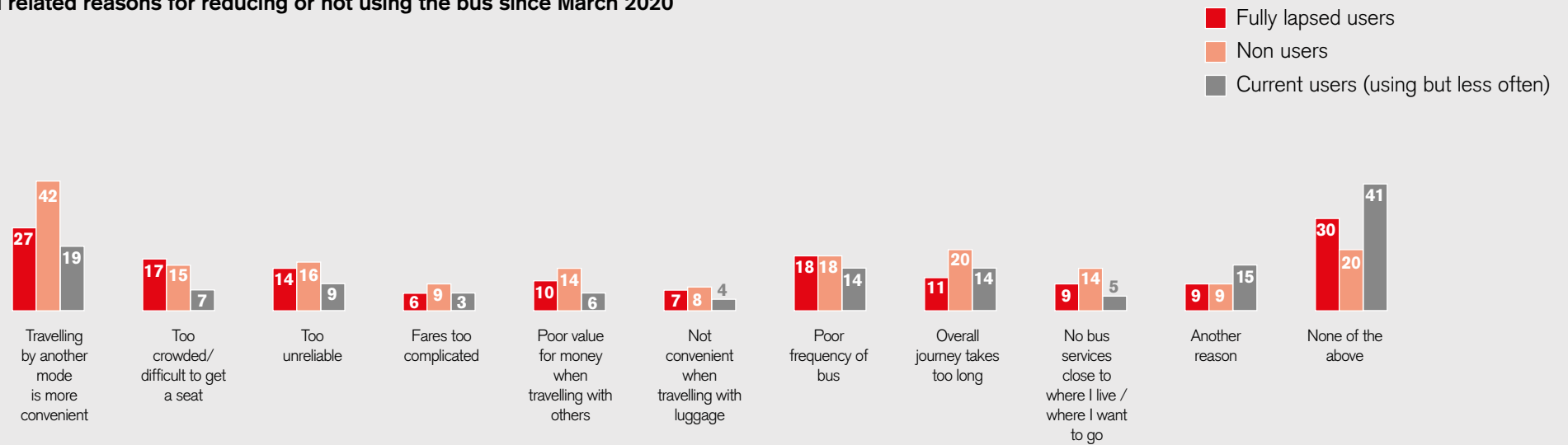
Q3_6. And which, if any, of the following can explain why?

Base = 6038, current users = 2873, fully lapsed users = 1904, non-users = 1261

Non-users' top reason for not using the bus since March 2020 was that travelling by another mode was more convenient. Although they shared the same concerns about Covid-19 as lapsed users, they also highlighted other concerns with bus travel. This included:

- the overall journey takes too long
- that buses were too infrequent, too unreliable, too crowded/it was difficult to get a seat
- there was poor value for money when travelling with others
- they had no bus services close to where they live/where they want to go.

Non-Covid related reasons for reducing or not using the bus since March 2020

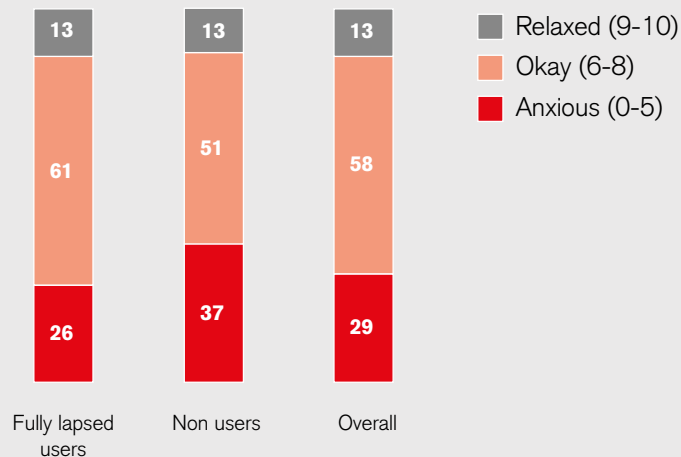


Q3_6. And which, if any, of the following can explain why?

Base = 6038, current users = 2873, fully lapsed users = 1904, non-users = 1261

Looking ahead to a time when all travel restrictions are removed both lapsed passengers and non-users were a little more confident, with fully lapsed passengers feeling more relaxed than non users. Anxiety levels among non-users fall from around half to 37 per cent and among fully lapsed users they fall from around half to 26 per cent.

How relaxed are those who are not current users about taking the bus post Covid-19 (%)



NET Relaxed (Relaxed - Anxious)



Fully lapsed user **-12**
(vs. -41 currently)



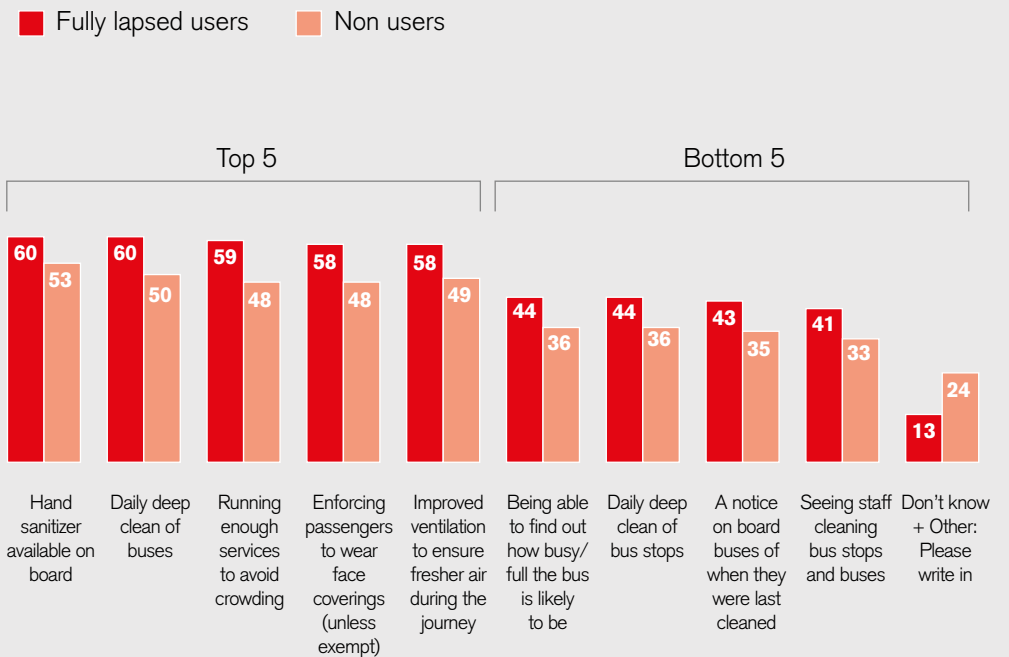
Non user **-24**
(vs. -40 currently)

3.2 And thinking about this summer, assuming all travel restrictions are lifted and the risk of contracting the virus is very small, how would you feel travelling by bus?

Base = 3165, fully lapsed users = 1904, non-users = 1261

While Covid-19 is still present, these two groups would like to see a number of measures in place to minimise the spread. Particularly the availability of hand sanitiser on board, daily deep cleaning of buses, running enough services to avoid crowding, enforcing the wearing of face coverings (unless exempt) and improved ventilation to ensure fresh air during the journey.

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



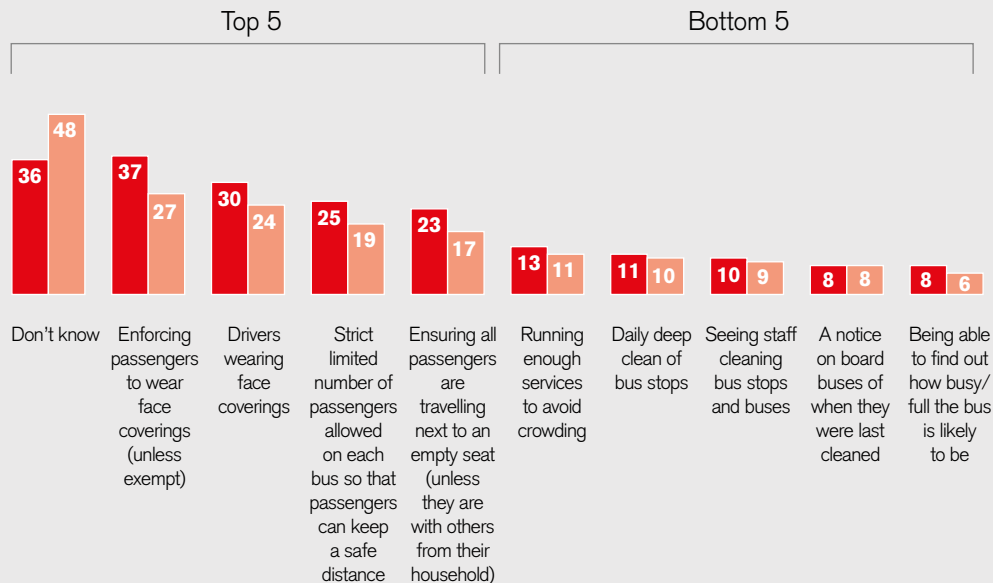
Q3_3. Thinking about travelling by bus while Covid-19 is still present and assuming bus travel is allowed, which of the following measures would you want to see in place on board buses and at bus stops to ensure safer travel? Base = 3165, Fully lapsed users = 1904, Non users = 1261

Attitudes of fully lapsed and non-users to bus use during the Covid-19 pandemic

When asked what measures they thought were currently in place around half of non-users and a third of fully lapsed passengers said that they didn't know. This indicates that a better understanding of what is already in place on board buses and at bus stops is needed. Of all the measures in place, the wearing of face coverings was most likely to be mentioned.

Covid-19 measures thought to be in place by fully lapsed and non users (%)

■ Fully lapsed users ■ Non users



Q3_3. Thinking about travelling by bus while Covid-19 is still present and assuming bus travel is allowed, which of the following measures are you sure are currently in place on board buses and at bus stops to ensure safer travel? Base = 3165, Fully lapsed users = 1904, Non users = 1261

Not being informed to the contrary, fully lapsed users and non-users make certain assumptions about what measures have been implemented. Of the measures that are most important to them, they are particularly likely to assume that not enough services are being run to avoid crowding, that hand sanitiser is not available on board and that ventilation is inadequate.

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

		Fully lapsed users	Non users
Running enough services to avoid crowding	43	46	37
Hand sanitizer available on board	42	45	36
Improved ventilation	40	42	36
Daily deep clean of buses	37	39	33
Being able to find out how busy/full the bus is likely to be	34	36	30
A notice on board buses of when they were last cleaned	33	35	28
Daily deep clean of bus stops	31	33	26
Strict limited number of passengers allowed on	30	30	29
Seeing staff cleaning bus stops and buses	30	32	24
Ensuring all passengers are travelling next to an empty seat	28	28	26
Taping off or marking some seats	25	25	23
Drivers wearing face coverings	22	23	22
Enforcing passengers to wear face coverings	21	21	21

Q3_3. Thinking about travelling by bus while Covid-19 is still present and assuming bus travel is allowed, which of the following measures would you want to see in place on board buses and at bus stops to ensure safer travel? And which of these are you sure are currently in place on board buses and at bus stops to ensure safer travel? Base = 3165, Fully lapsed users = 1904, Non users = 1261

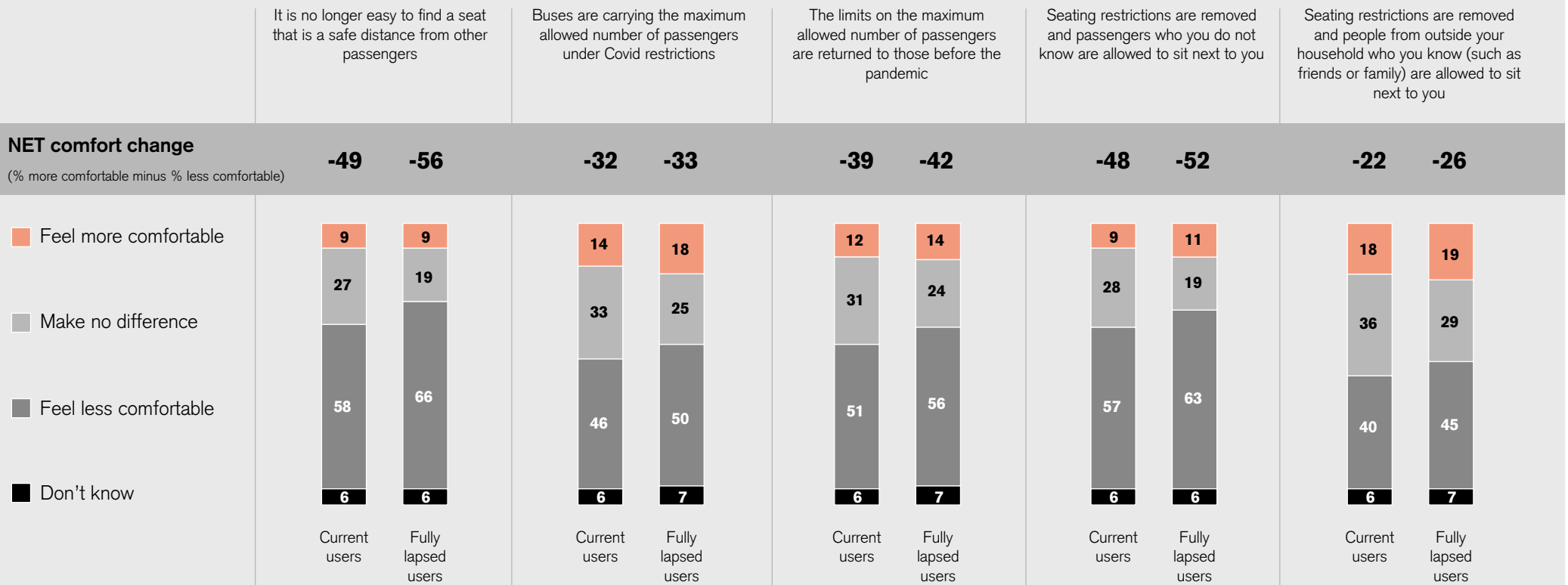
Concerns around the easing of social distancing measures on board



At the time of conducting this research, measures to increase capacity on board buses (for example allowing all forward-facing seats to be used) had not been introduced. But, we wanted to know what impact these could have upon the

passenger experience. For most of the scenarios put forward, passengers said they would feel less comfortable about travelling on buses, in particular for those directly related to social distancing (from a stranger) when seated.

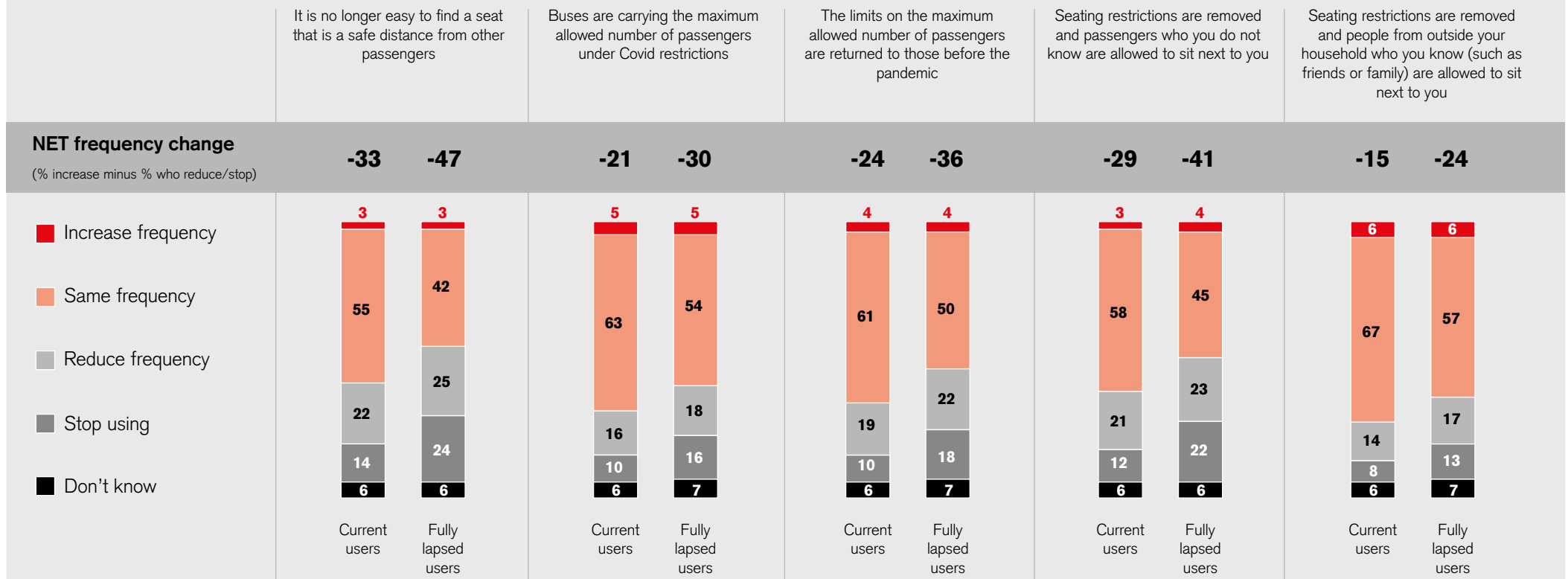
How comfortable users would feel about the removal of social distancing restrictions (%)



Q5_4. What difference, if any, will the following have on your overall experience of travelling on the bus?
Base Current users n= 4,498, Fully lapsed n= 1,904

In many cases, this discomfort has the potential to lead to a reduction in bus travel, especially for lapsed passengers.

Impact on users' frequency of travel of the removal of social distancing restrictions



Q5_4. What difference, if any, will the following have on your overall experience of travelling on the bus?
Base Current users n= 4,498, Fully lapsed n= 1,904

Priorities for increased bus use



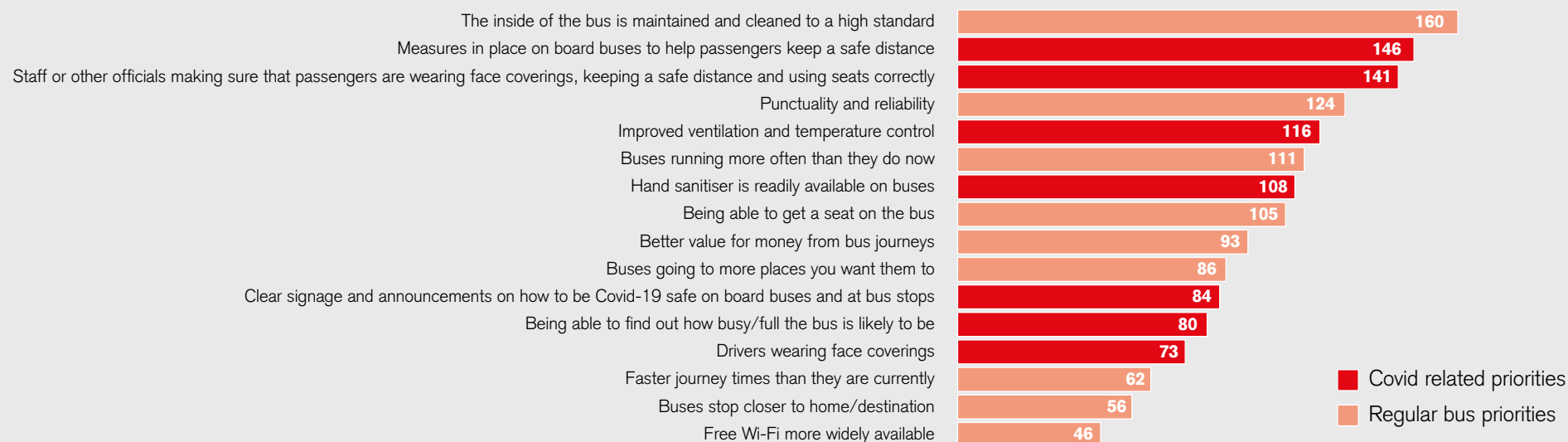
Transport Focus periodically asks users and non-users about their priorities for improving bus services. We last asked them in 2019, publishing the results in *Bus passengers' priorities for improvement* in September 2020.

For this research we asked current users who had reduced their bus use and fully lapsed users to pick the aspects that would encourage them the most to use the bus more often when things have returned to 'normal'. For this

research, we included measures to protect passengers from the risk of infection while travelling by bus as well as matters which have shown up as important to passengers in previous research. This produced the below rankings:

Priorities for encouraging those who have reduced their bus travel to use the bus more

Scores show importance relative to each other such as score twice as high as another means the item is twice as important: 100 = average level of priority



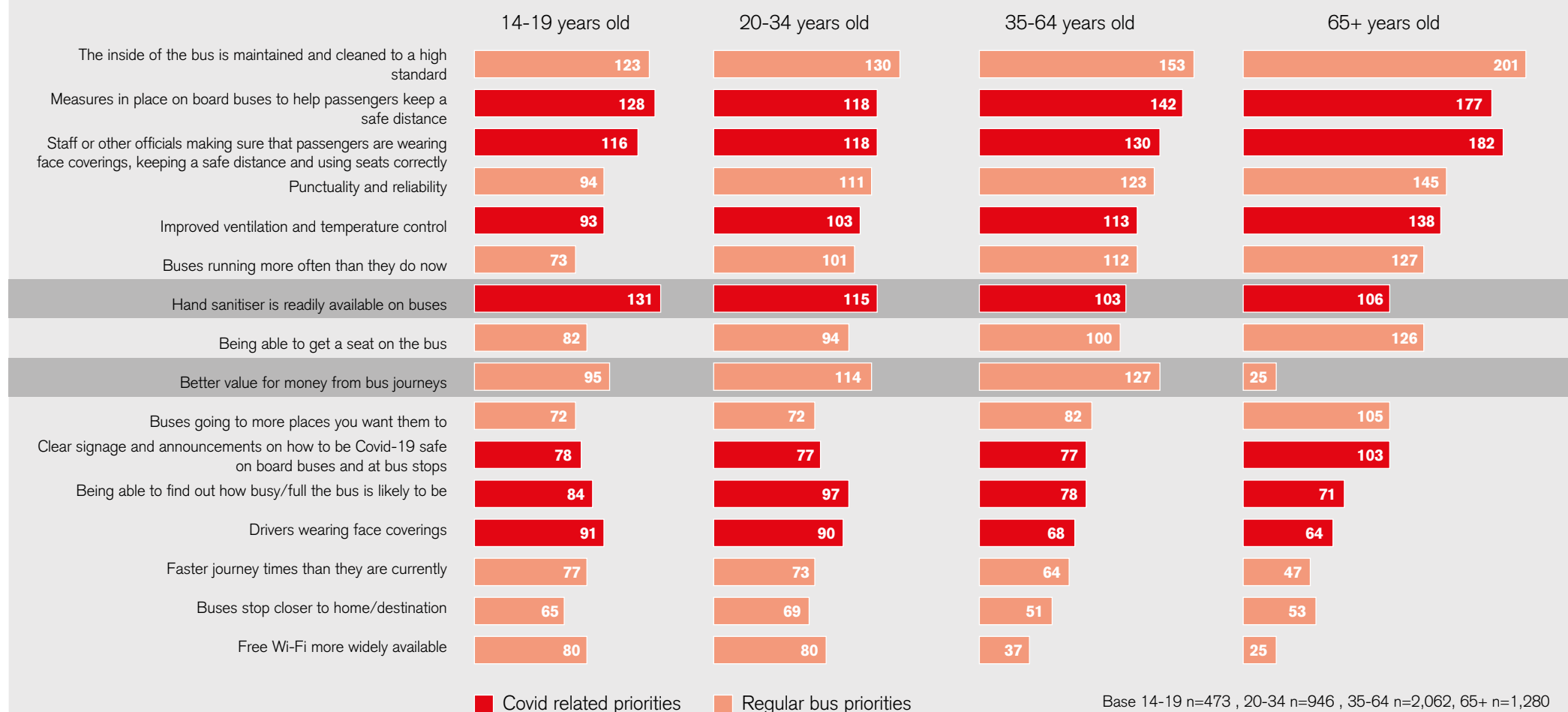
Base Fully lapsed and Current reducers n=4,777

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.

Priorities for encouraging those who have reduced their bus travel to use the bus more

Scores show importance relative to each other such as score twice as high as another means the item is twice as important: 100 = average level of priority



Ticket discounts and special offers will encourage a large share of lapsed users to use the bus more than now, especially the younger ones. Half of lapsed users agreed that special ticket offers would encourage them to use the bus more

and a third agreed that they would return to using the bus sooner if their first trip were at a reduced price.

Lapsed user views on ticket discounts and special offers (%)

	NET Agree	Urban	Semi urban	Rural	14-19	20-34	35-44	45-54	55-64	65+
Special ticket offers would encourage me to use the bus more	50	53	48	52	56	58	51	40	49	36
I will return to using the bus sooner if my first trip is at a reduced price	33	40	29	34	38	48	28	22	29	12

Q5_6 Q5_7 - And how much do you agree or disagree with the following statements about tickets? Base = 1340

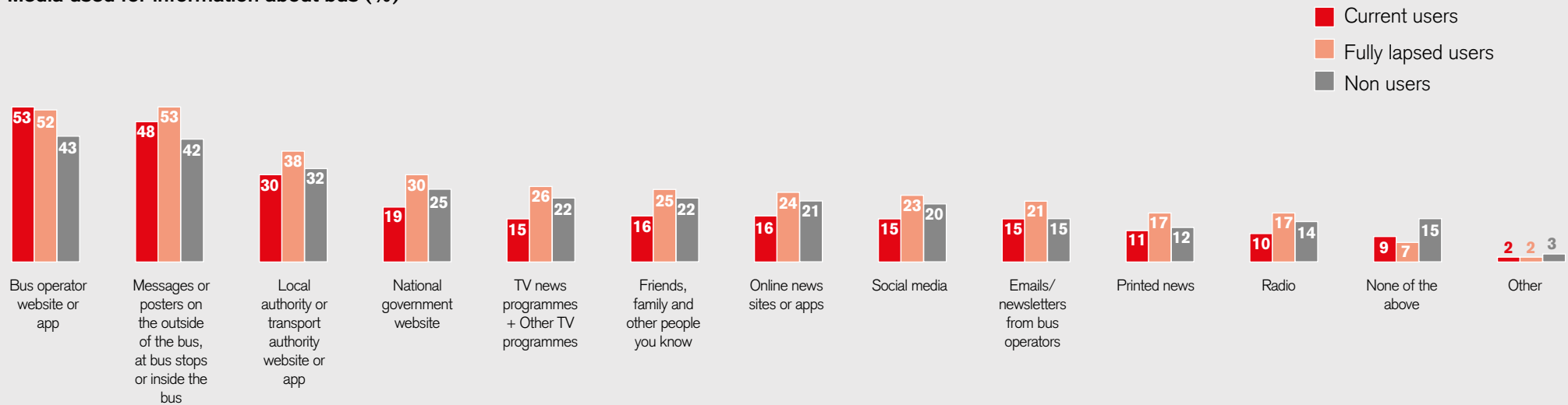
Communicating with users and non-users



When seeking information about bus services and the measures being taken to ensure safer travel during Covid-19, current users are most likely to use bus operator websites, apps, messages or posters on the outside of the bus, at bus stops or inside the bus

and at bus stops. Fully lapsed users and non-users are also likely to use local authority or local transport authority websites or apps.

Media used for information about bus (%)



Q3_4. Which of the following media would you use/look at and which do you trust to get information about bus services and the measures being taken to ensure safer travel during the Covid-19 pandemic?

Base = 6038, Current user = 2873, Fully lapsed users = 1904, Non users = 1261

Learning points and recommendations



In the report we published in April, based on the interviews and small group discussions conducted, we made a number of recommendations about what the bus industry should do to address the issues raised. Each recommendation or learning point was based on the findings of our research and further explained by an accompanying Transport Focus comment.



The bus industry still needs to focus on getting the basics right: frequent, punctual services and value for money fares.

The survey we have reported here tests the conclusions we reached from that research. The survey findings confirm those from our earlier research, so we repeat them here. We also recognise that the need for certain measures will diminish over time as the pandemic recedes and rules are further relaxed and removed.

Priorities for improvement

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

Flexible fares

Operators should introduce, and promote the availability of, more flexible tickets which reflect new patterns of demand. These should provide attractive deals for those who are travelling two or three times a week and those wishing to make multiple trips over an extended period. Operators should also consider increasing their promotions,

Learning points and recommendations

such as reduced/discounted fares for a fixed period or deals for travelling to visitor attractions.

Longer term

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

Promoting safety

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

- promoting social distancing by running a sufficiently frequent service, using floor markings and making it clear if any seats are not to be used
- reducing the risk of airborne infection by using disinfectant sprays, good ventilation and temperature control and/or advanced air-conditioning systems which remove stale air



Many operators have already introduced measures in line with our recommendations and we encourage others to do so.

- reducing the risk of infected surfaces through cleaning regimes and by providing hand sanitiser
- providing contactless facilities for those wishing to pay by this method (although a cash option should be retained)
- drivers opening all windows before the start of each journey.

Communicating safety

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

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

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

They should use trusted and effective channels to communicate these key messages on and off the bus to existing and potential users. This includes

Learning points and recommendations

bus shelters and the sides of buses and onboard audio-visual announcements.

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

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

Our findings, learning points and recommendations provide a solid basis on which the bus industry can restore passenger confidence. Many operators have already introduced measures in line with our recommendations and we encourage others to do so.

Conclusion

Despite the continuing success of the vaccine roll-out, the appearance of new Covid-19 variants reminds us that the pandemic has not gone away. Measures to keep passengers safe and maintain their confidence in the service are likely to be needed for some time to come.

The good news for the bus industry is that by the end of the pandemic, when all restrictions related to Covid-19 have been lifted and things have returned to normal, bus use is predicted to pick up to almost pre-pandemic levels with nearly all fully lapsed users back on the bus. While positive, it should be remembered that bus patronage was declining nationally before the pandemic.

However, this will happen only if bus operators, working with local authorities, take on board

what current and lapsed users are telling them. Our survey confirms the conclusion from our earlier interviews and small group discussions that the bus industry needs to continue to focus on getting the basics right – value for money, frequency and punctuality. Restoring pre-pandemic patronage levels and building new markets, as envisaged in the Government's national bus strategy, requires a renewed focus on passengers' basic needs while maintaining the improved cleaning and hygiene regimes which the bus industry has put in place. Measures such as these, introduced in response to the pandemic, can offer long-term benefits to the travelling public.

The change in the number of passengers allowed on a bus in England occurred in May 2021, after the fieldwork for our research was carried out in March and April 2021. The bus industry will be relieved to be able to once again use all forward-facing seats on their vehicles, and those travelling at

busy times will be grateful that they will, as a result, be more likely to be able to board the first bus. However, we know from research we have conducted since this survey that many passengers are anxious about having a stranger sitting next to them, especially when the wearing of face coverings is not universally adopted. Ironically, the busy buses that the bus industry understandably regards as a sign of a successful bus operation are, particularly in the current environment, a challenge for many bus users who are much more satisfied, and feel much safer, when they are able to travel on lightly-loaded vehicles.

Until everyone is vaccinated and the pandemic has receded, some passengers will continue to regard travelling at busy times as an experience to endure rather than embrace. In the meantime, the bus industry must do all it can to make bus travel as safe as possible and communicate the measures they have taken to that end.

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Transport Focus is the operating name of the Passengers' Council

Transport Focus is the independent consumer organisation representing the interests of:

- bus, coach and tram users across England outside London
- rail passengers in Great Britain
- all users of England's motorways and major 'A' roads (the Strategic Road Network).

We work to make a difference for all transport users.