



# Bus Concessionary Travel Survey

June 2022

# Background and sample definition

- On Tuesday 22 March 2022 we sent an online survey to our Transport User Panel which asked those who hold a concessionary pass (specifically those holding a pass for 'older' people and those holding a disabled persons' pass) about their recent use of buses to make journeys using these passes. The survey also asked questions about the reasons for not using buses among those who are eligible for a free pass, but who don't use buses or who haven't done for some time.
- While invitations to complete the survey were sent to 22,941 Transport User Panellists, the specific types of panellist to whom the survey was directed was made clear in the invitation email, so many will have ruled themselves out of the survey without clicking on the survey link.
- On Monday 29 March a reminder email was sent to those who had not started to complete the survey or had started but stopped completing it part-way through. When the survey closed at 8am on Monday 4 April 5,097 panellists had submitted a response.
- As indicated, the survey was targeted at a core group of Transport User Panellists, and so several types of people were 'screened' out. This included those who, after consideration of the criteria, found that they were not eligible for a concessionary pass for 'older' people or those with a disability, and those holding a free pass for students or other types of concessionary pass. In total 1,780 of those who began the survey were screened out for one of these reasons.
- In relation to interpretation of the findings in this report, please note that data is unweighted and therefore results should be seen as indicative of the views of the targeted population rather than statistically representative of them.

# Summary of key findings (1)

Among current bus users who hold a concessionary pass or who are eligible to do so:

- 60 per cent say that they use buses to make journeys for leisure reasons (other than shopping, making day trips, or visiting family or friends) while 50 per cent use buses to make shopping trips. The majority of those using a bus do so during the week between 9.30am and 6.30pm.
- Half say that the way in which they use buses has changed since the start of the pandemic. 38 per cent say that they are using buses less frequently now than they were before this time, while 49 per cent say that the frequency of their bus use has not changed. Just 13 per cent are using buses more frequently.
- Among the group which are using buses less frequently, 65 per cent say that generally they are making fewer journeys now than they did before the start of the pandemic. 35 per cent say that they are using buses less frequently because in terms of coronavirus they believe that using a bus is less safe than using other modes of transport.
- Among those using buses more frequently, 49 per cent say that this is because they believe that using a bus is better for the environment than driving. 38 per cent say that they are using buses more frequently because they are now cheaper and more convenient than the alternatives are.
- 71 per cent say that they would consider using a bus more frequently in the future and 54 per cent say that they would consider using buses to make journeys that they currently make using other forms of transport. Half of those who say that they would consider using buses more often say that increased frequency of buses, and a greater range of direct routes to appropriate destinations would most encourage them to do so.

# Summary of key findings (2)

Among those eligible for or holding a concessionary pass who do not use buses, or who do not use buses now but used to:

- Half of those who do not use buses say that this is because buses are less convenient than the alternatives. Slightly fewer say that buses don't run when or where they want them to or that they prefer to travel by car. 54 per cent of those who do not use buses now but used to say that this is because in terms of coronavirus, they feel that using a bus is less safe than the alternatives are.
- 74 per cent of those who do not use buses now but used to say that it is likely that they will use buses again in the future. This decreases to 68 per cent if we consider only those who have not used a bus since the start of the pandemic.
- 39 per cent of those who do not use buses now but used to say that they would be most likely to use buses again if more was done to ensure protection against coronavirus. Slightly fewer say that they would be most likely to use buses again if they went directly to more destinations, or if buses were more frequent. Similarly, 49 per cent of those who do not use buses say that they would be most likely to do so if buses went directly to a greater number of appropriate destinations.
- 15 per cent of those who do not use buses but used to, and 28 per cent of those who do not use buses say that they could be encouraged to do so if they knew more about their local bus service. Among these people 80 per cent say that it would be useful to know about the frequency of their local buses, and 76 per cent say that it would be useful to know about local bus routes / where buses go.

# Summary of key findings (3)

Findings relating to knowledge of local bus services among those who hold a concessionary pass or who are eligible to do so:

- 87 per cent of those currently using buses say that they know at least a fair amount about their local bus service. 23 per cent of those who do not use buses say the same.
- Among those who say that they know at least something about their local bus service, 89 per cent say that they know all or most of what they need to know concerning the times that a free pass can, or cannot, be used. Conversely, only 45 per cent of these respondents say that they know all or most of what they need to know regarding whether the cost of the free pass covers that of travelling with a carer.
- Among those who say that they know nothing about their local bus service 71 per cent would like to know more about what times the buses run, while 68 per cent would like to know more about which buses to catch to get to the places that they want to go.
- 81 per cent have talked to others or looked for information about their local bus service while 19 per cent have not. Among those that have looked for information, 66 per cent have read information / posters at their local bus stop while 65 per cent have used the bus operator website. Among those who have not looked for information, if they were to do so, 61 per cent would use the bus operator's website while 46 per cent would use information / posters provided at the local bus stop.

# Summary of key findings (4)

Findings relating to bus use and coronavirus among those who hold a concessionary pass or who are eligible to do so:

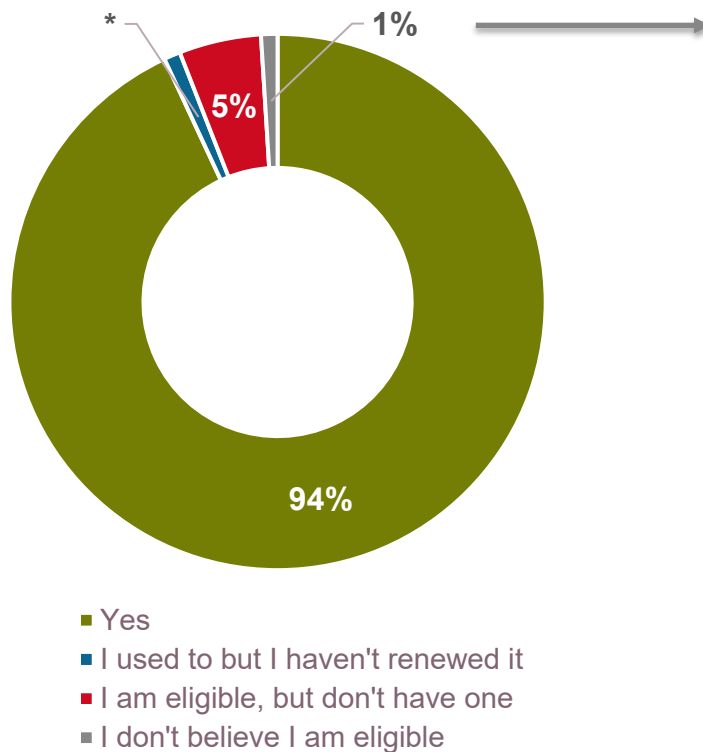
- Specifically in terms of coronavirus, 82 per cent of those who are currently using buses at least once a month feel safe doing so, while 58 per cent of those not using buses as regularly, or not at all, say that they would feel safe using a bus if they had to do so.
- 54 per cent agree that coronavirus is a major concern for them, while 44 per cent agree that enough is being done to ensure coronavirus safety on public transport. Almost one in five agree that they will never again feel completely comfortable travelling on buses.
- While 36 per cent say that the coronavirus pandemic is not having an impact on their decision to use buses or otherwise, 44 per cent say that new variants of coronavirus would need to have increasingly mild symptoms in order to be convinced that the pandemic had receded sufficiently for them to be unconcerned about using a bus. 43 per cent say that the number of hospitalisations and deaths due to coronavirus would need to fall to near zero to have the same impact.

# **Concessionary pass and bus use among respondents**



**94 per cent of the sample hold a concessionary pass to use buses, while 5 per cent are eligible but choose not to hold one. 1 per cent did not think that they were eligible until they considered the criteria more fully.**

*Do you hold a pass which allows you to travel for free on local bus services or do you believe that you are eligible for one?*



*Are you certain that you are not eligible for a pass that allows you travel for free on local bus services?*

*To be clear, you would be eligible for an 'older person's' free pass if you are of pensionable age in England, or if you are 60 years of age or older in London, Wales or Scotland. Similarly, you are eligible for a 'disabled person's' pass if you:*

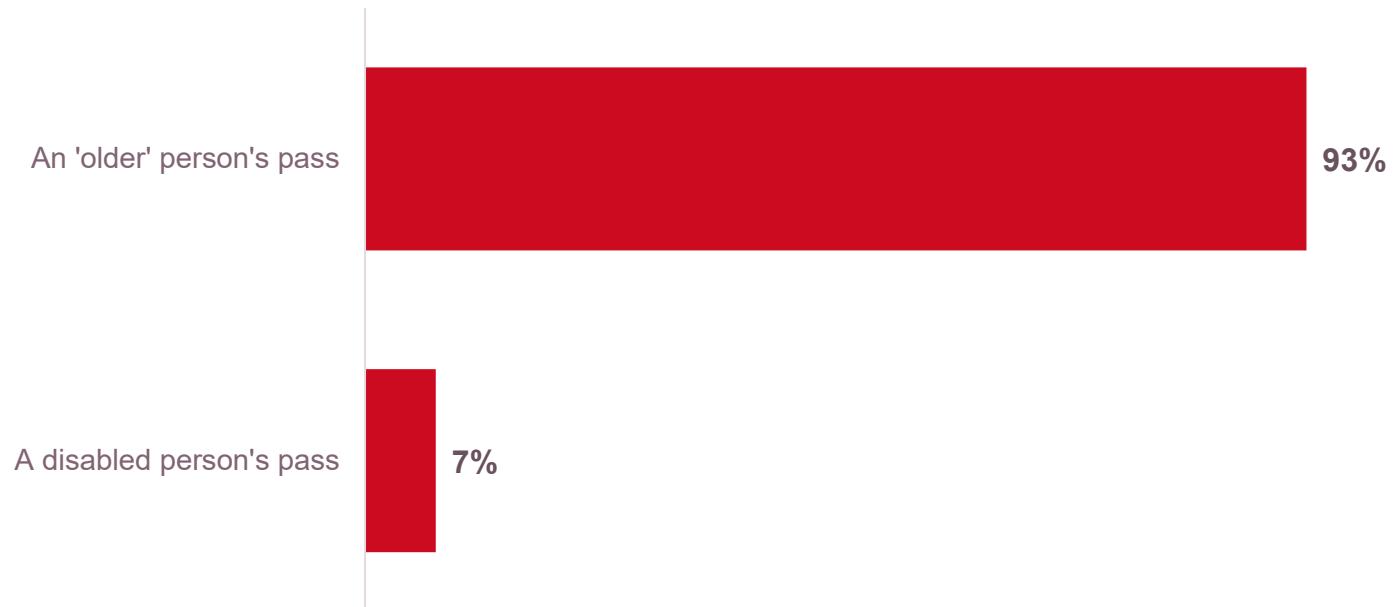
- are blind or partially sighted*
- are profoundly or severely deaf*
- are without speech*
- have a long-term disability or injury which seriously impairs the ability to walk*
- are without the long-term use of both arms*
- have a significant degree of learning disability*
- would be refused a driving licence on physical fitness grounds*

Base: All respondents (5,097). \* less than 1%



## The majority of respondents hold, or would be eligible for, an 'older person's pass to make journeys on buses for free

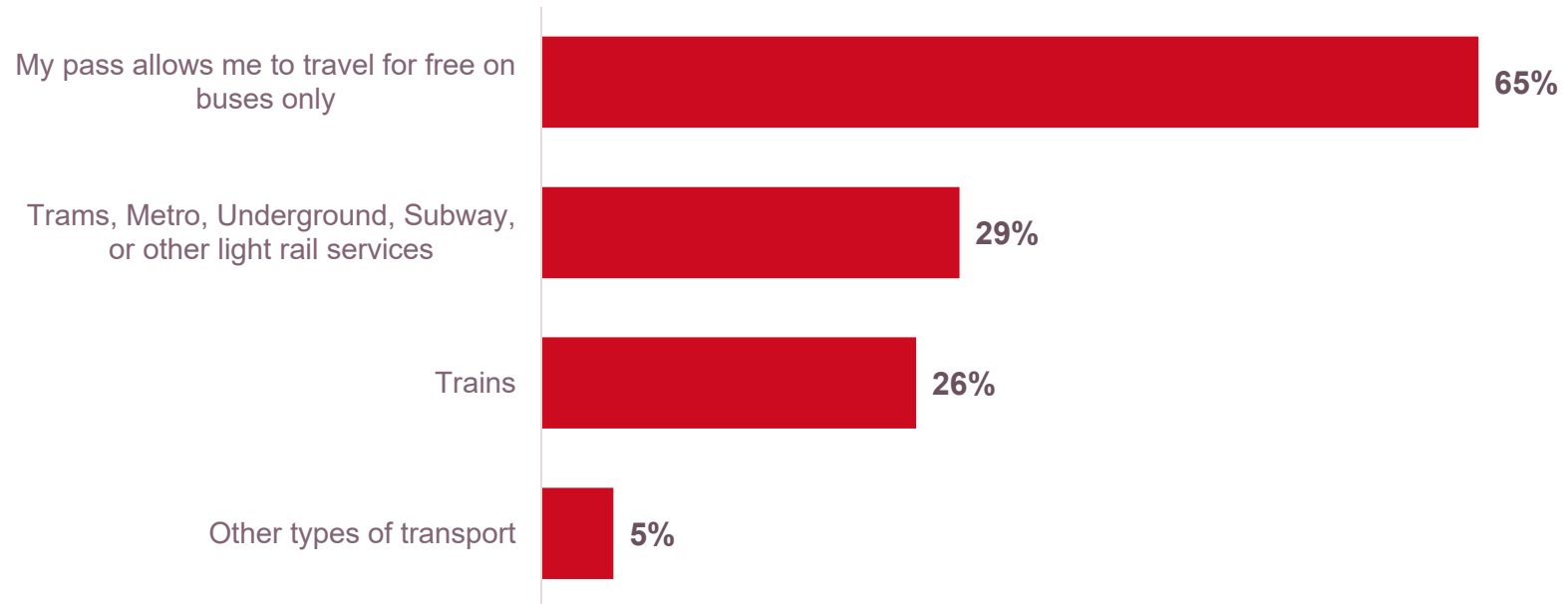
*What type of pass is / was this (or would it be if you don't hold one, but believe that you are eligible)?*



Base: All respondents (5,097)

**For two thirds of those who currently hold a concessionary pass, this is only valid for bus travel. More than a third can also use their pass to travel for free on other modes of transport**

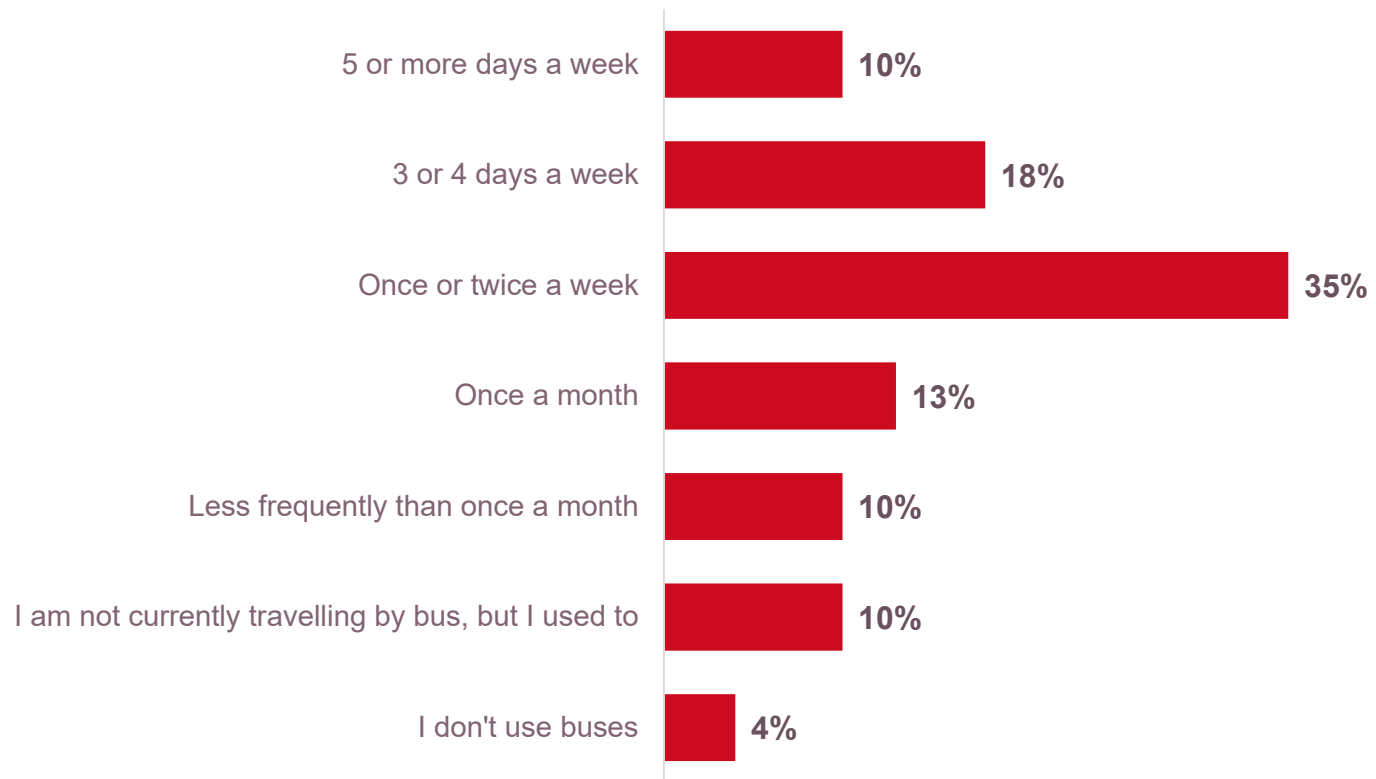
*Which of the following types of transport, if any, can you also travel on for free using the pass that you hold?*



Base: All those who currently hold a concessionary bus pass (4,769)

**More than a third of those who are currently using buses are doing so once or twice each week. One in ten say that they are not currently using buses, but that they used to.**

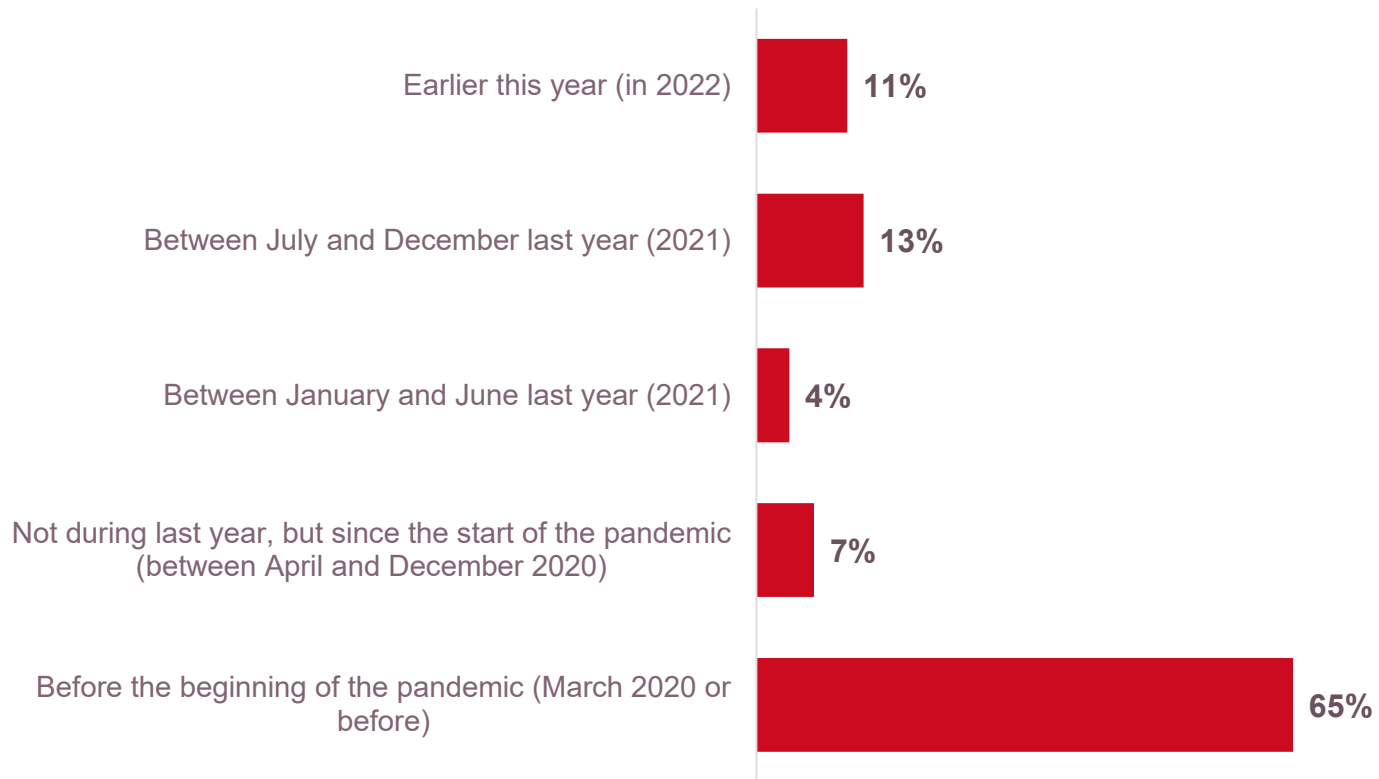
*How often do you currently travel by bus?*



Base: All respondents (5,097).

## The majority of those who are not currently using buses have not done so since before the beginning of the pandemic in March 2020

*Approximately when did you last travel by bus?*



Base: All those who are not currently using buses, but used to (521).

## The majority of those who are currently using buses, or who used to, use their free pass for all of the journeys that they make

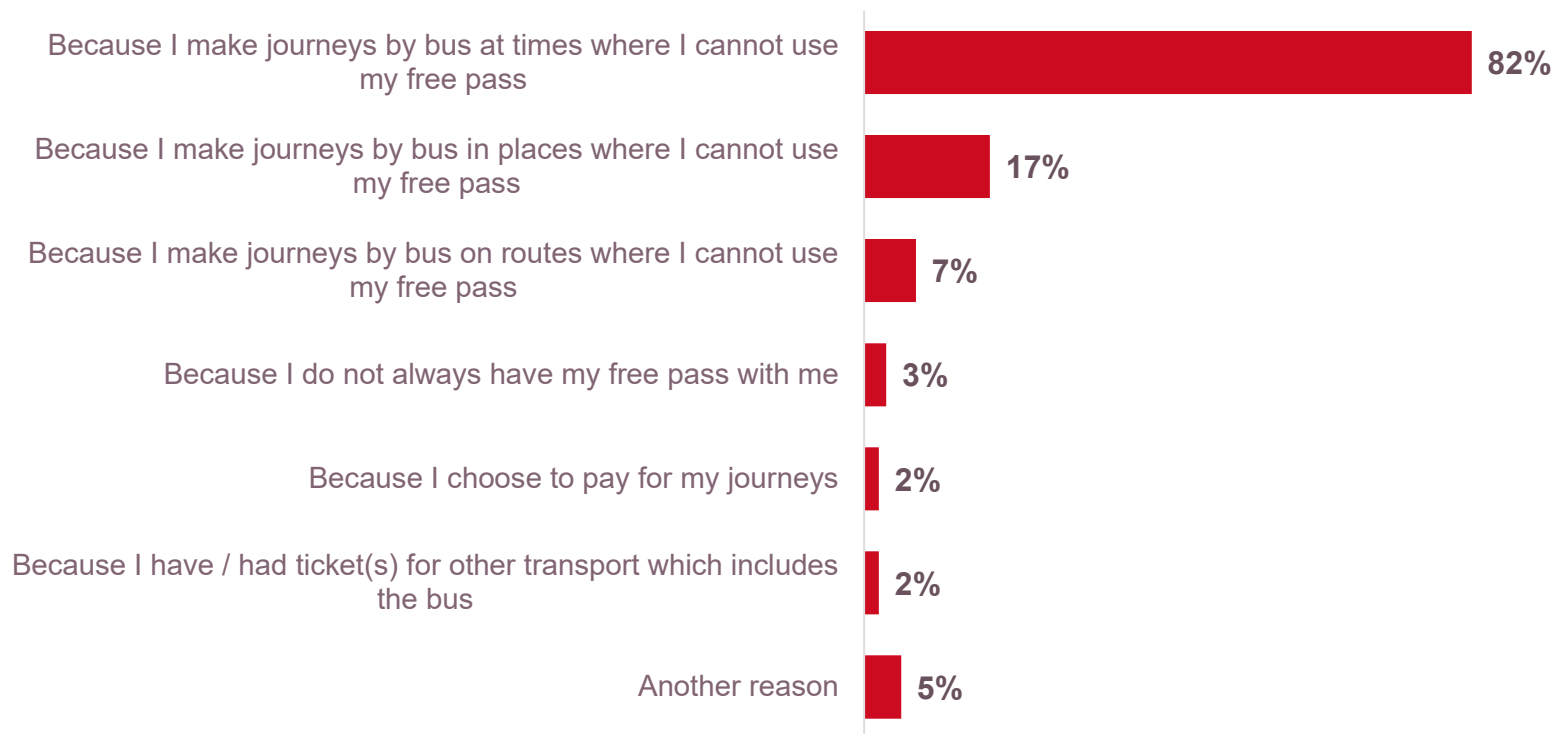
*When you make journeys by bus do / When you were last making journeys by bus did you use your free pass for all, most, some, or none of your journeys?*



Base: All those who are currently using buses / are not currently using buses but used to (4,908).

## Among those who do not or did not previously use their free pass for all of the journeys that they make or made by bus, for the majority this was because they travel at times when the pass could not be used

*Why do/did you not use your free pass for all of the journeys that you make/made by bus?*



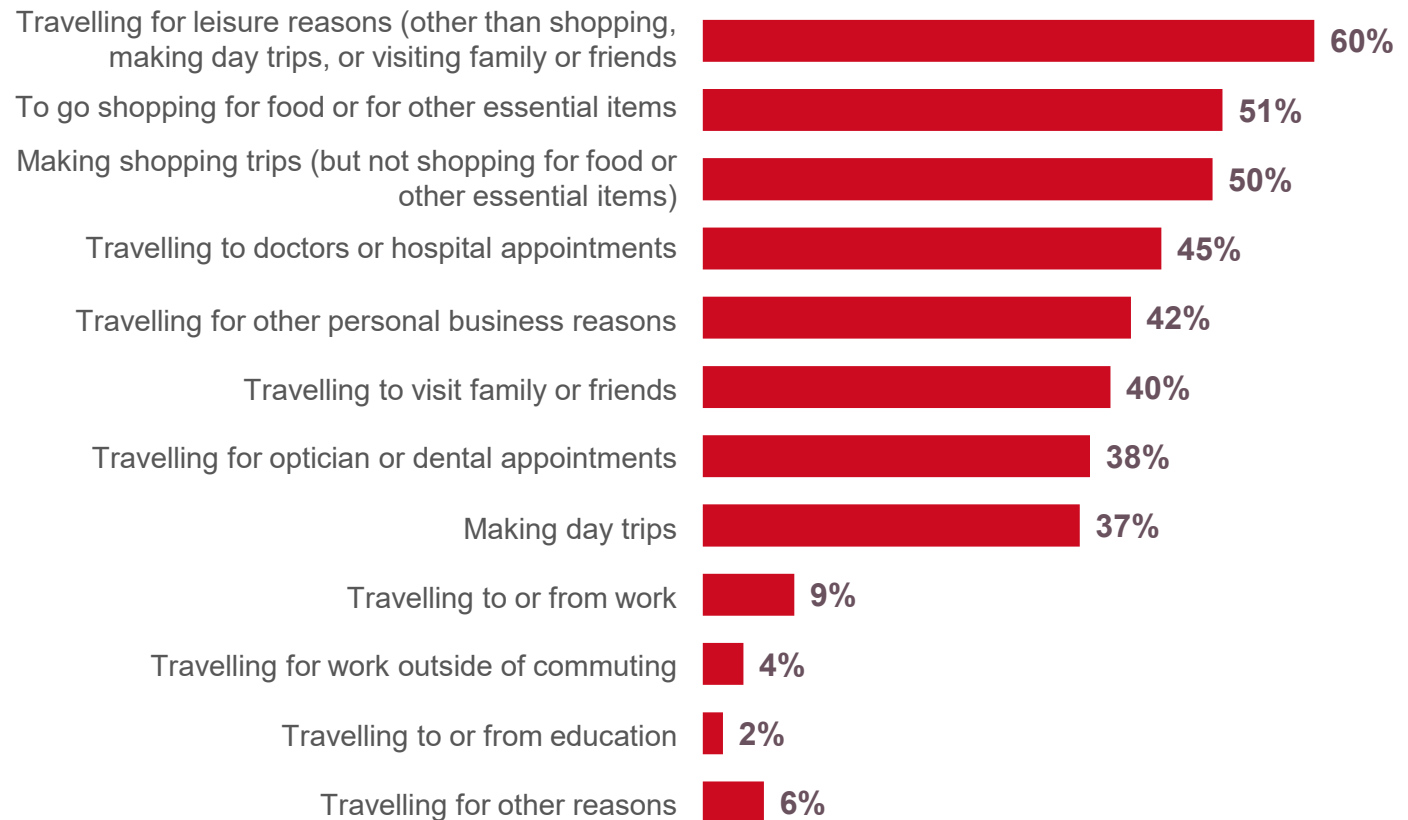
Base: All those who are currently using buses / are not currently using buses but used to and who do or did not use their free pass for all of their bus journeys (827).

# Current Bus Users



## The most common reasons for the journeys which are currently being made by bus are travelling for leisure reasons, shopping for food or for other essential items, or other types of shopping trips.

*For which of the following reasons are you currently making journeys by bus?*

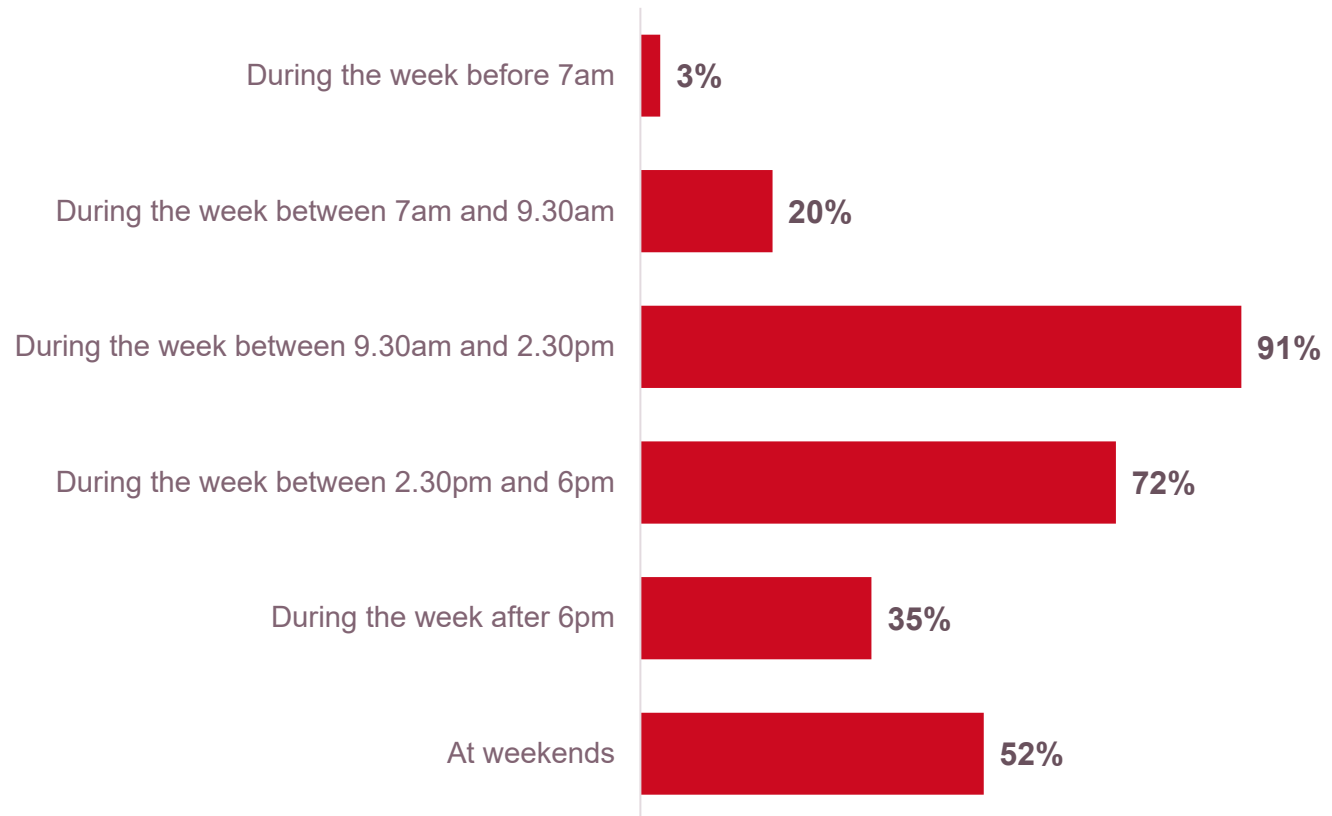


Base: All those who are currently using buses (4,387).



**The majority of those who are currently using buses make journeys during the week between 9.30am and 6pm. A half also make journeys by bus at weekends.**

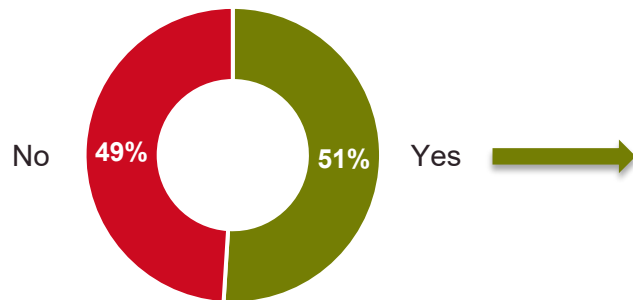
*At what times of day do you make journeys by bus?*



Base: All those who are currently using buses (4,387).

## For half, the way in which they use buses has changed since the start of the pandemic

Has the way in which you use buses changed over the last two years (i.e. since the start of the pandemic in March 2020)?



*Using buses less because I am walking more to avoid being in close contact with people.*

*I no longer have a PTE Travel card for train and bus for commuting as I only commute a max of 2 days per week so now rely solely on my free bus pass and buying single train tickets on an app. However I can't use my bus pass before 9.30am so walk to the train station.*

*The pandemic has changed my travel patterns: some things I used to do in central London I now do locally (such as giving blood or going to the optician). I have retired and therefore no longer make any trips which are directly work-related. I am under less time pressure and sometimes catch buses on a whim to visit a different area or go for a walk.*

*I seldom use the buses now and only do so if they are almost empty*

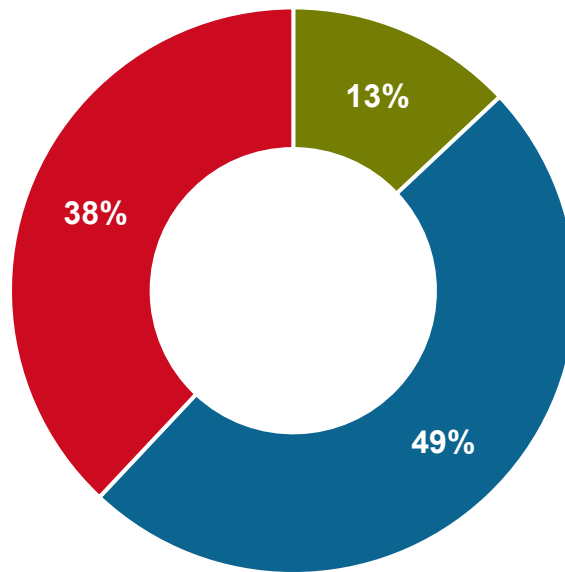
*Can no longer use my Freedom Pass before 0900 on weekdays.*

*I used to commute to work by bus and train but worked from home from March 2020 until I retired in July 2021. I try to avoid busy times e.g. when schools have just finished, so the buses are less crowded (due to Covid risk).*

Base: All those who are currently using buses (4,387).

**For half the pandemic has not impacted on the frequency with which they use buses. 38 per cent are now using buses less frequently than they did previously.**

*Are you now using buses more or less frequently than you did before the start of the pandemic (in March 2020), or has this not changed?*

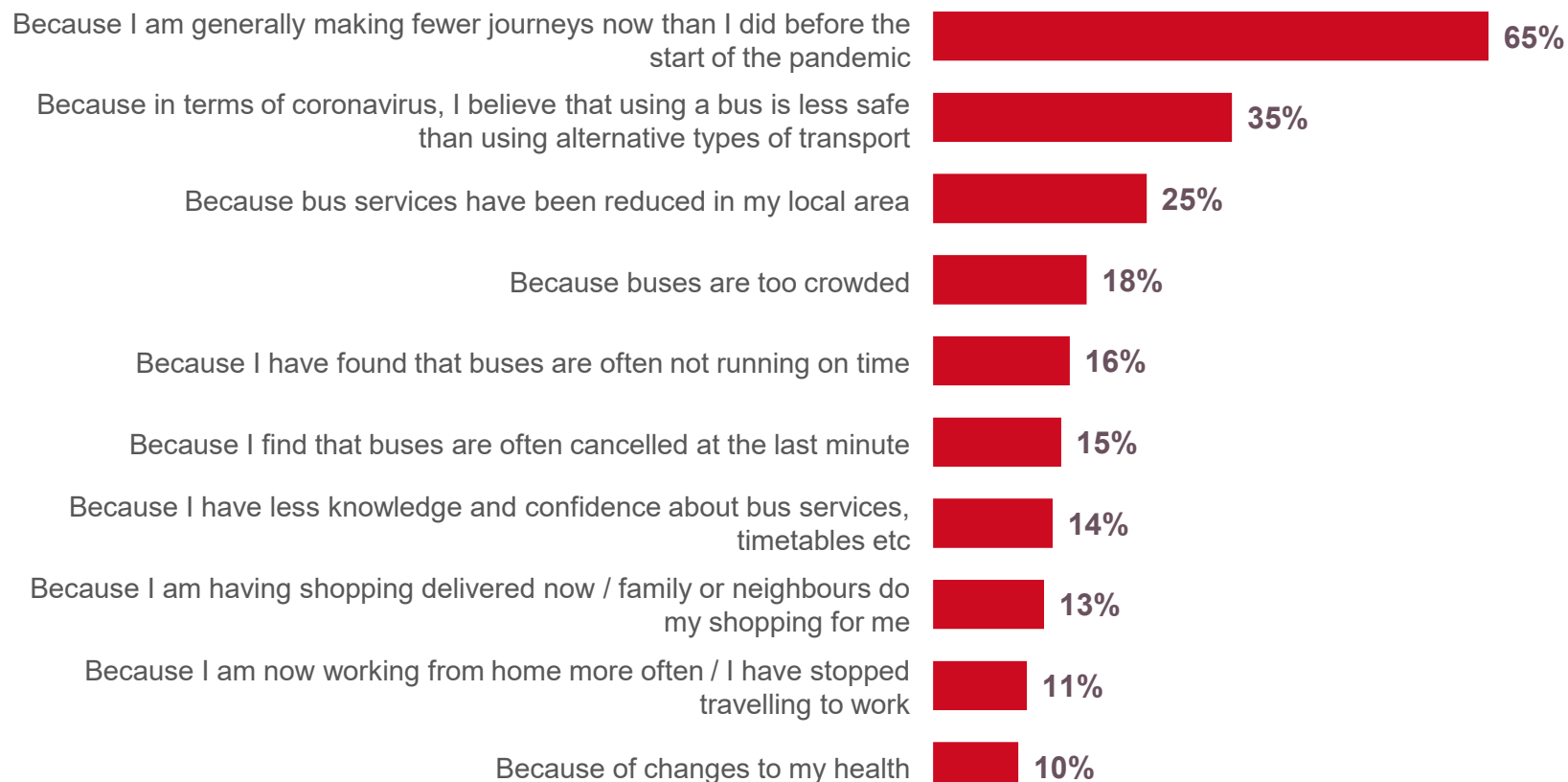


- I am using the bus more often than I did previously
- The frequency with which I am using this bus has not changed
- I am using the bus less often than I did previously

Base: All those who are currently using buses (4,387).

## Two thirds of those who are using buses less frequently than they were before the start of the pandemic say that this is because they are generally making fewer journeys now.

Why are you using buses **less** frequently than you did prior to the start of the pandemic? (Top 10)



Base: All those who are currently using buses less frequently than they did since before the start of the pandemic (1,665).

## Less than one in ten of those who are using buses less than they were before the start of the pandemic say that this is because buses are now less convenient than the alternatives.

Why are you using buses **less** frequently than you did prior to the start of the pandemic? (Bottom 10)



Base: All those who are currently using buses less frequently than they did since before the start of the pandemic (1,665).

**Many of those who say that buses are not convenient mention the routes and reliability of buses. Others have found other modes of transport more convenient after switching during the pandemic.**

*The local services are few and far between. They rarely go where I want to travel to. Train is faster and easier to use even though it costs money instead of being free. They are generally routed through all the villages so even short journeys are not quick and are subject to delay.*

*Reduction in my local service. Reduction in park and ride service. No local service to the airport, our largest local employer.*

*Not being used in the pandemic due to safety concerns with people not wearing masks have found other ways to move from A to B including a lot of walking.*

*The service has been cut from every hour to every two hours which means there is often not a bus when I need to travel.*

*I used both car and bicycle rather than the bus during the pandemic and have become used to there being no timing restrictions using these methods.*

*The frequency has been reduced so that connections are less immediate.*

*They no longer run into the late evening on Friday and Saturday and some of my activities are theatre and concert visits.*

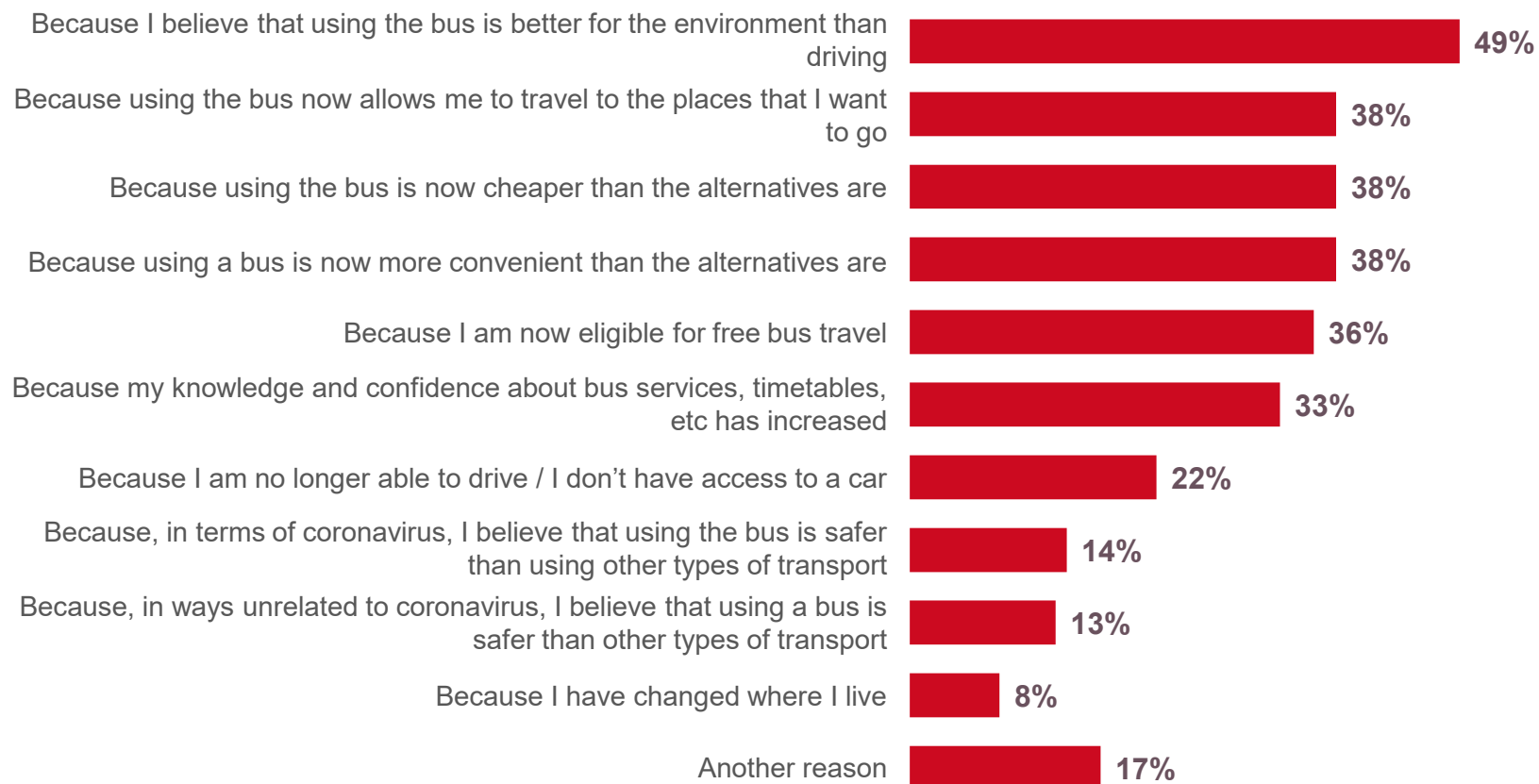
*They are less frequent, and do not stick to the published timetable - often running very late.*

*Once you start using the car more, it is tempting to continue. The bus station in Kendal is a miserable place to wait for a bus - cold and windy - and the changeovers of drivers mean that the bus often leaves late. The winter bus timetable is not great.*

Base: All those using buses less frequently now than before the pandemic who say that is because buses are now less convenient than the alternatives (134).

## Half of those who are using buses more frequently than they were before the start of the pandemic say that this is because they believe that using a bus is better for the environment than driving.

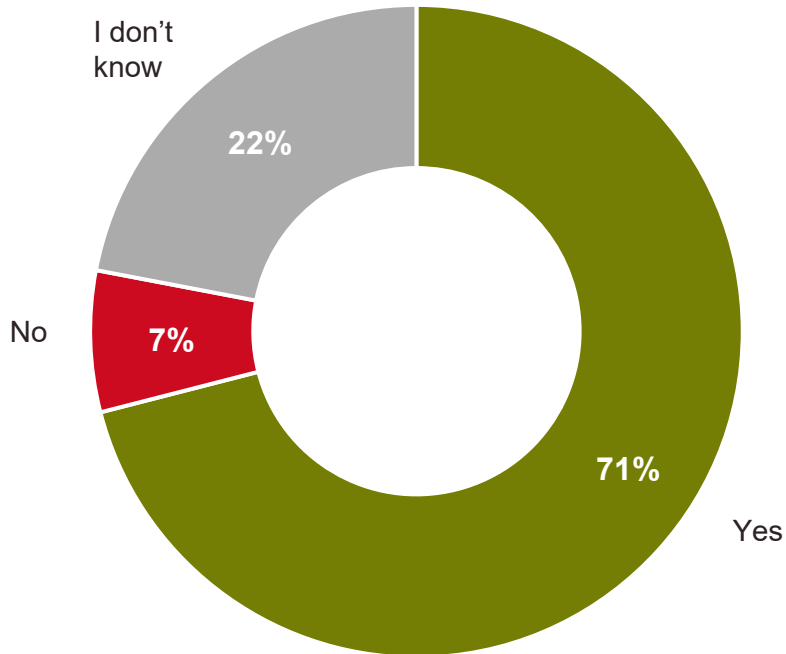
Why are you using buses **more** frequently than you did prior to the start of the pandemic?



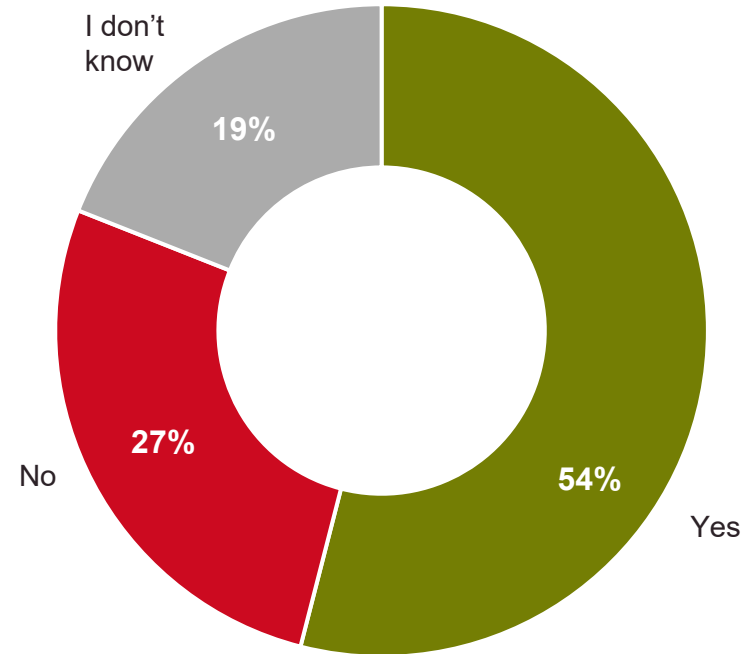
Base: All those who are currently using buses more frequently than they did since before the start of the pandemic (552).

**71 per cent that they would consider using buses more frequently in the future. 54 per cent say that they would consider using buses for making journeys that they currently make using different modes of transport**

*Would you consider using buses more frequently in the future?*



*And would you consider using buses for making journeys that you currently make using other types of transport?*

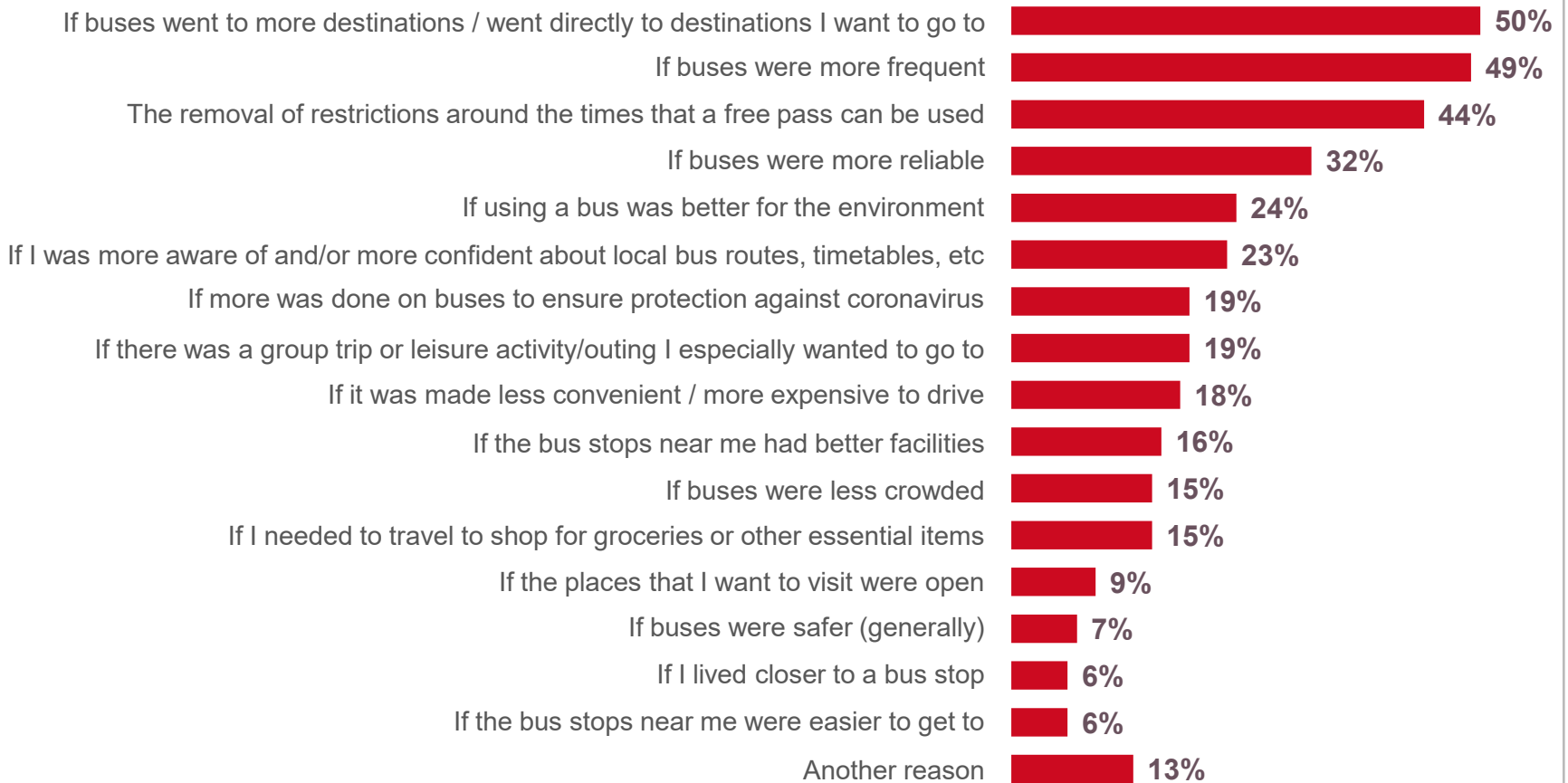


Base: All those who are currently using buses (4,387).



## Half of those who would consider using buses more frequently in the future say that they would do so if buses went directly to more destinations, or if they were more frequent

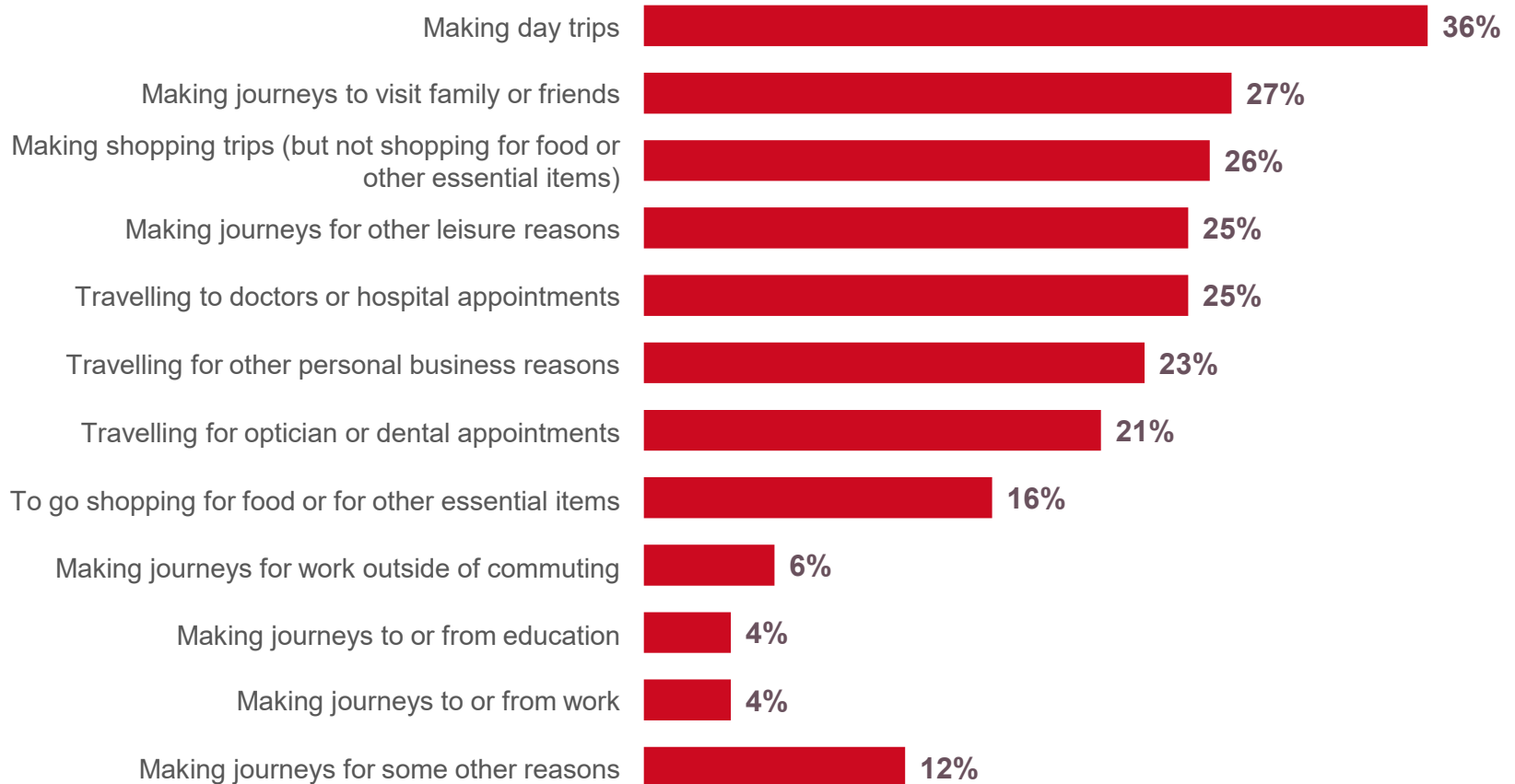
*Which five of the following reasons would most encourage you to use buses more frequently in the next six months or after?*



Base: All those who are currently using buses who would consider using buses more frequently in the future (3,121)

## A third would consider making day trips by bus rather than using other modes of transport to make these journeys as they do currently.

*Which other types of journeys might you consider making by bus rather than using other types of transport?*



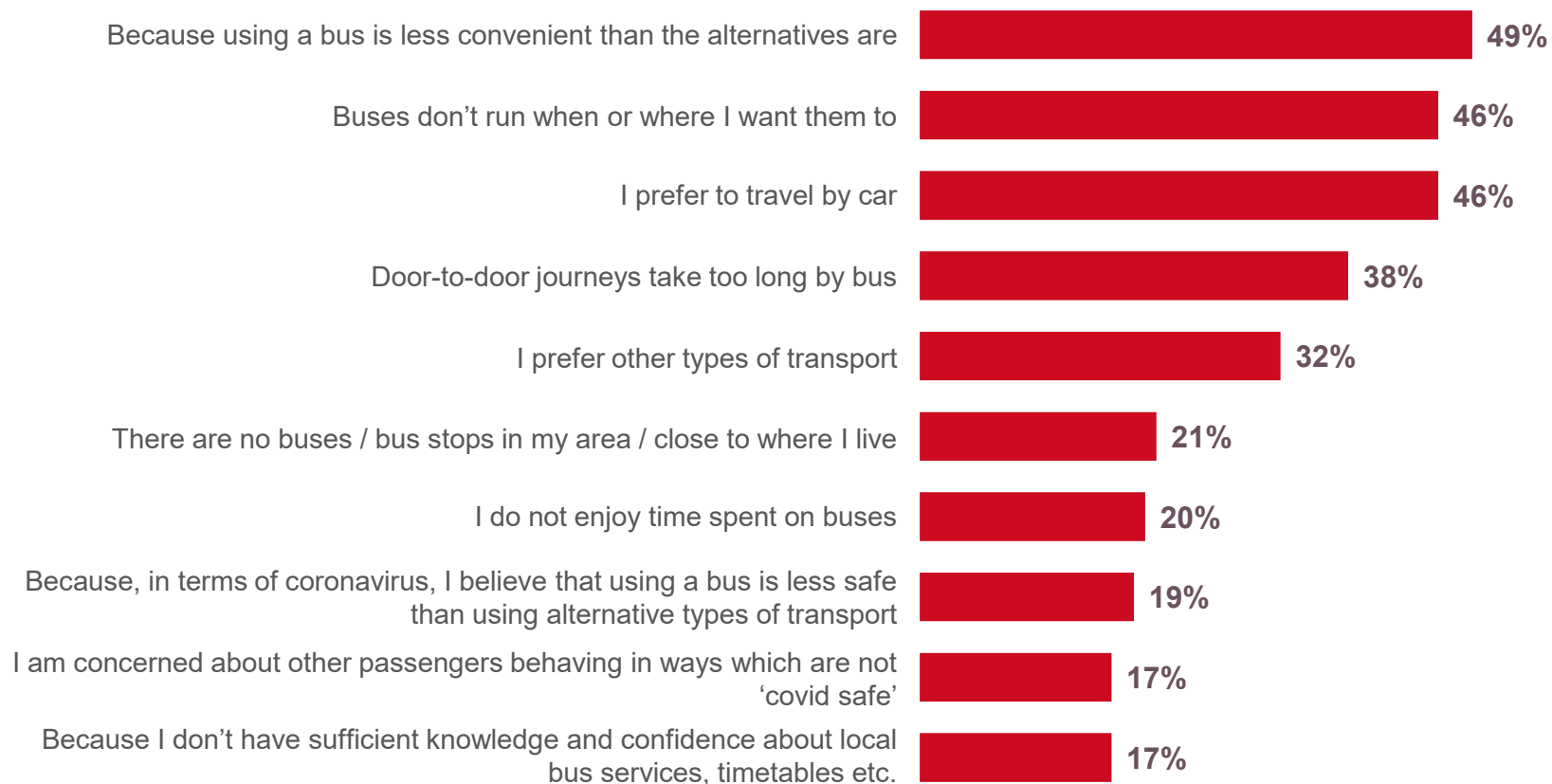
Base: All those who are currently using buses who would consider using buses for making journeys that they currently make using other modes of transport (2,382)

# Lapsed and Non Bus Users



## Those who do not use buses are most like to say that this is because buses are less convenient than the alternatives, that buses don't run when or where they want, or that they prefer travelling by car.

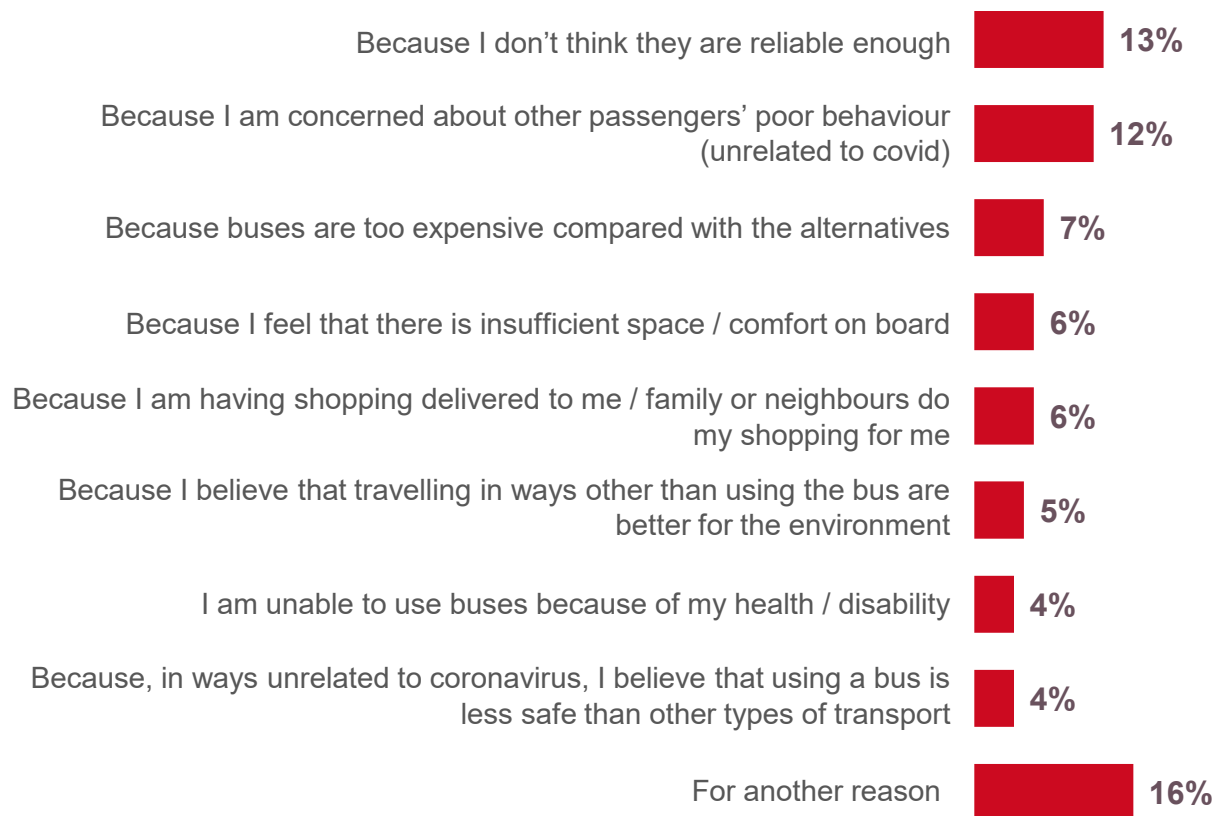
Which of the following reasons best describes why you do not use local buses? (Top 10)



Base: All those who do not use buses (189).

**Those who don't use buses are less likely to say that they don't do so because they think other modes of transport are better for the environment, because of the cost of using a bus, or because of the level of comfort on-board.**

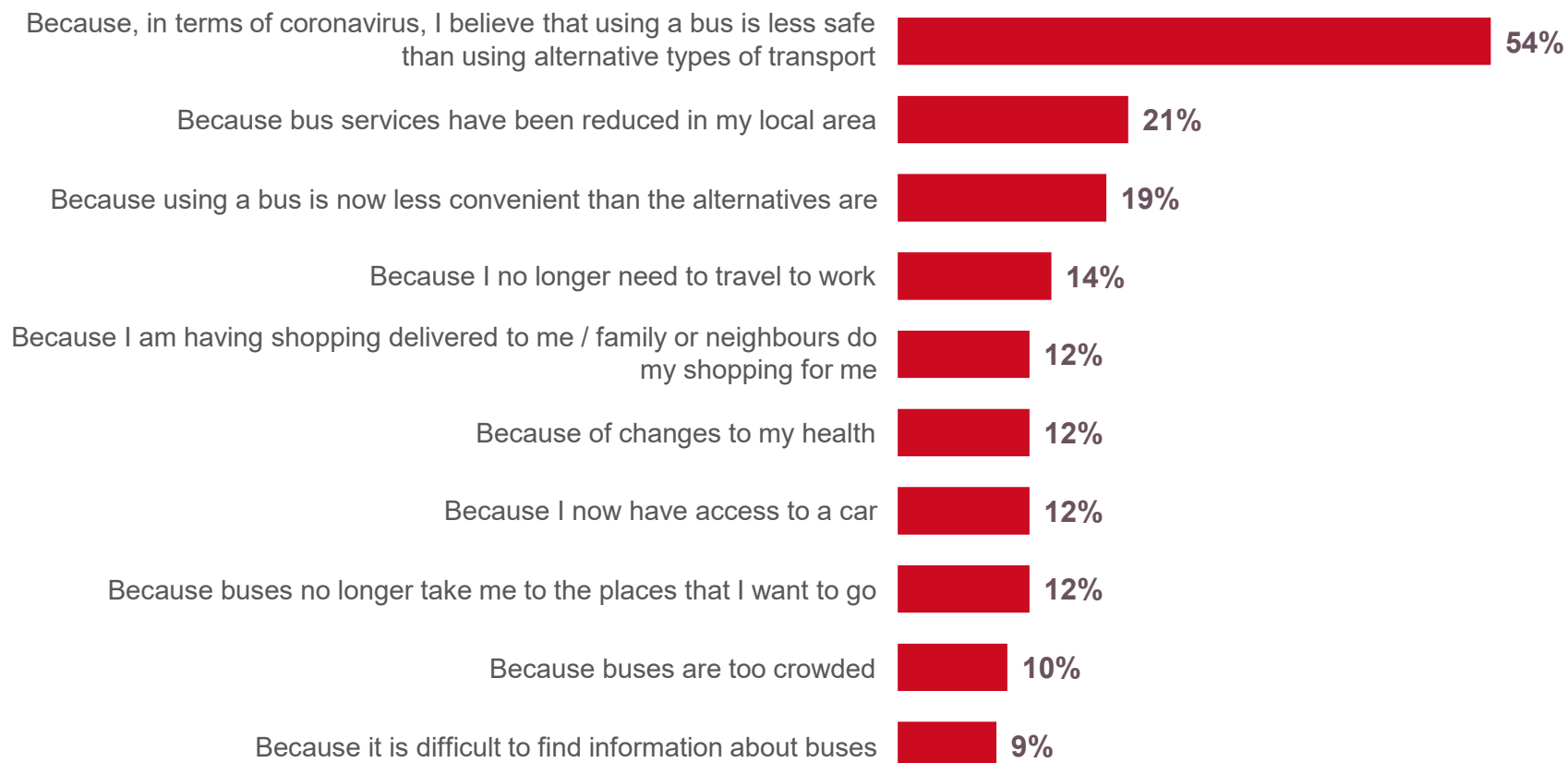
*Which of the following reasons best describes why you do not use local buses? (bottom 9)*



Base: All those who do not use buses (189).

## The majority who have stopped using buses say that this is because, in terms of coronavirus, they believe that using a bus is less safe than alternative types of transport.

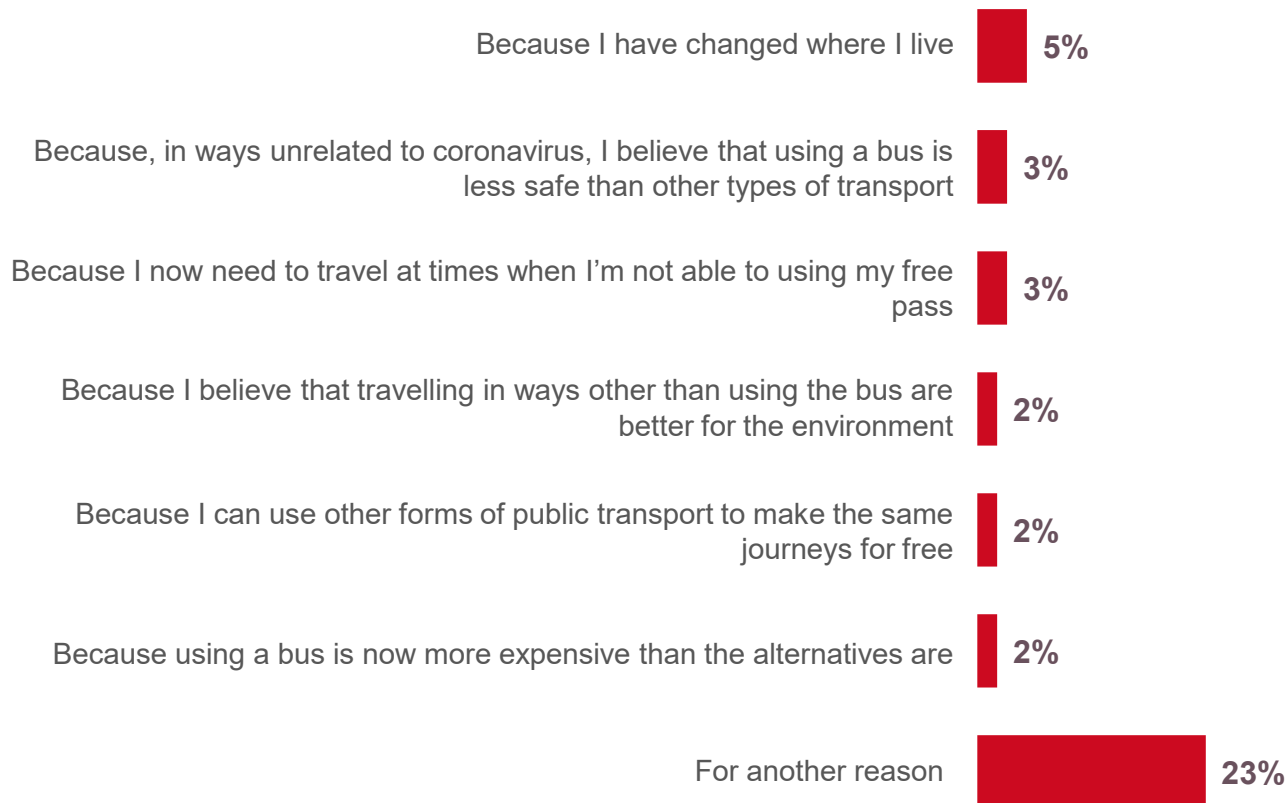
Which of the following reasons best describes why you have stopped using the bus? (Top 10)



Base: All those who are not currently using buses, but used to (521).

**Those who have stopped using buses are less likely to mention that this is because they believe that buses are less safe than other modes of transport or because using other modes of transport are better for the environment**

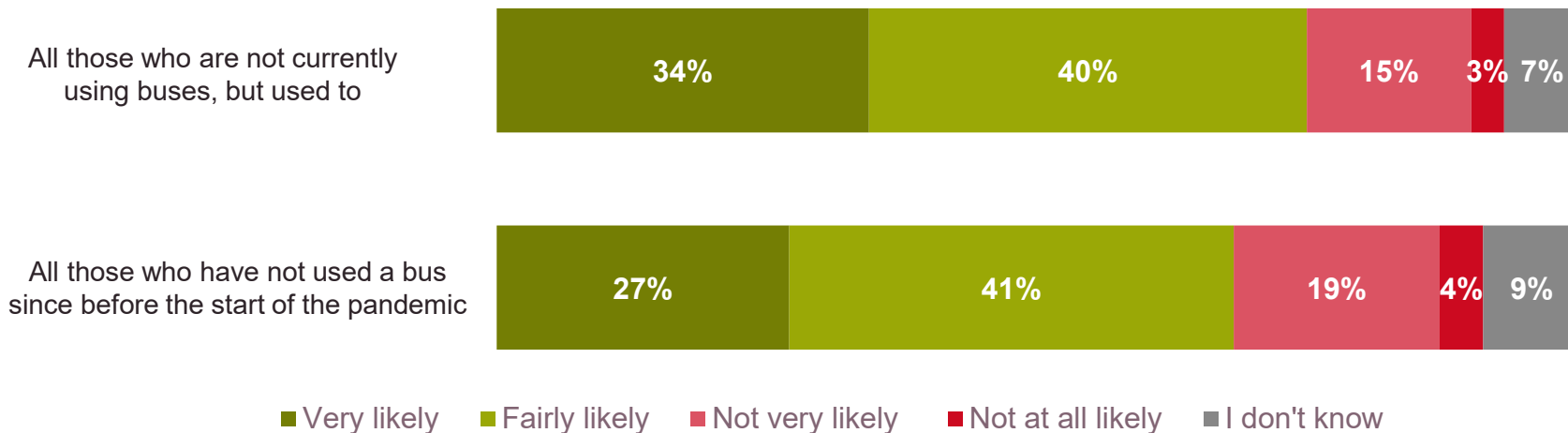
*Which of the following reasons best describes why you have stopped using the bus? (Bottom 7)*



Base: All those who are not currently using buses, bus used to (521).

**Three quarters of those who are not currently using buses say that it is likely that they will use buses again in the future. This decreases to 68 per cent if we consider only those who have not used a bus since before the pandemic**

*How likely or unlikely is it that you will use buses again in the future?*

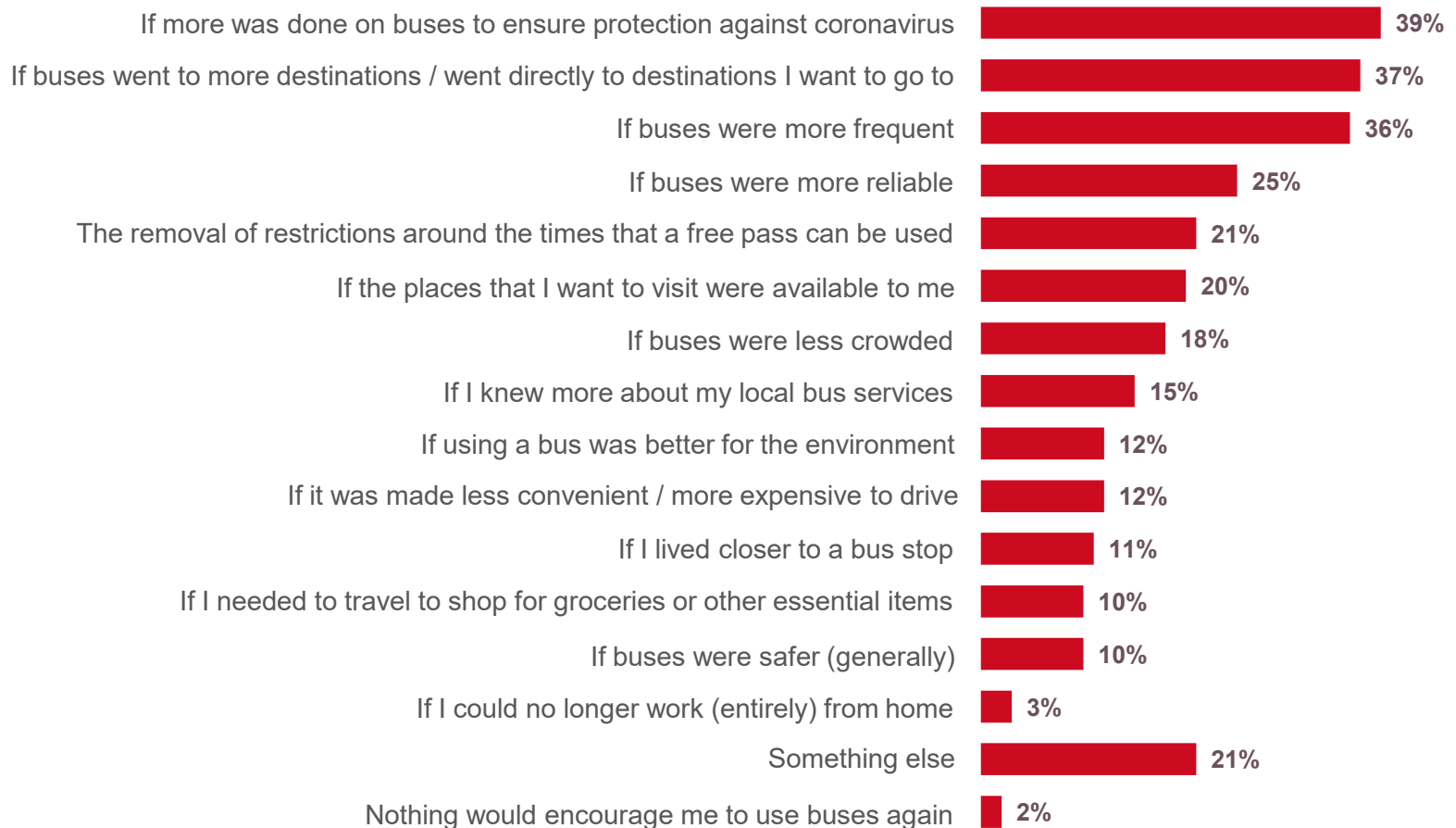


Base: All those who are not currently using buses, bus used to (521).  
Those who have not used buses since before the start of the pandemic (340)



## Alongside increased frequency and more destinations, more than a third of those who used to use buses say that doing more to ensure protection against coronavirus would encourage them to use buses again

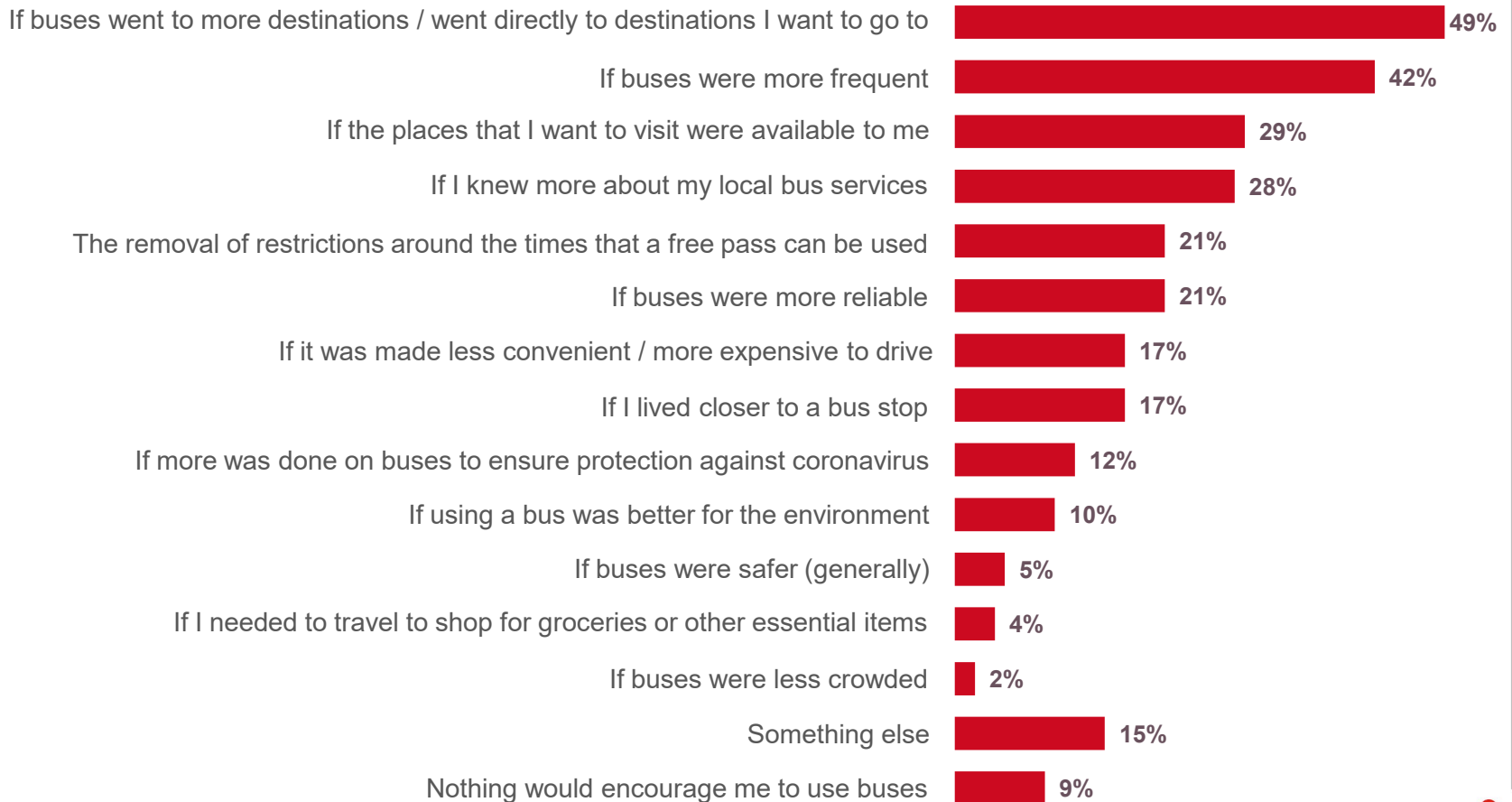
Which five of the following would encourage you to use your local bus service once again?



Base: All those who are not currently using buses bus used to (521)

**As with those who have stopped using buses, those who don't use buses say that more destinations and better frequency would encourage them to use buses. Unlike those that have stopped using buses, non-users are more likely to say that knowing more about their local bus service would encourage them to use buses**

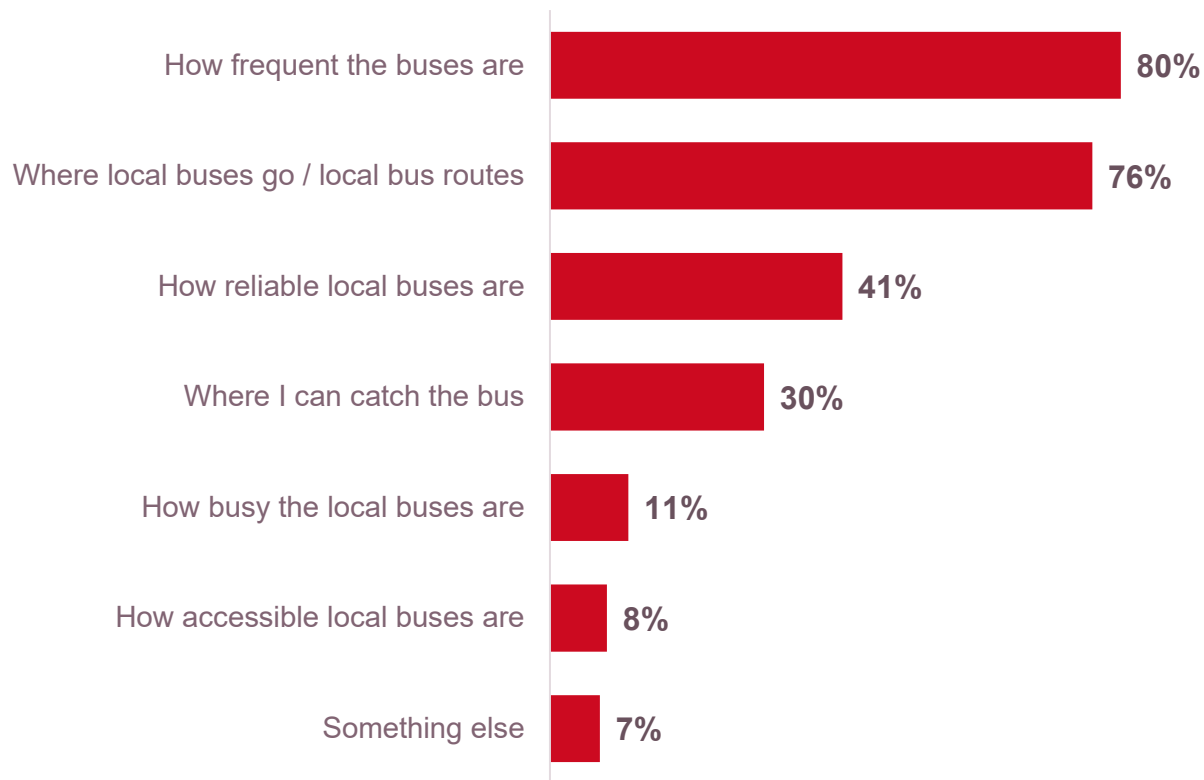
*Which five of the following would encourage you to use your local bus service?*



Base: All those who do not use buses (189).

**Those who say that they could be encouraged to use buses if they knew more about their local bus service are most likely to say that it would be most useful to them to know about frequency and local bus routes.**

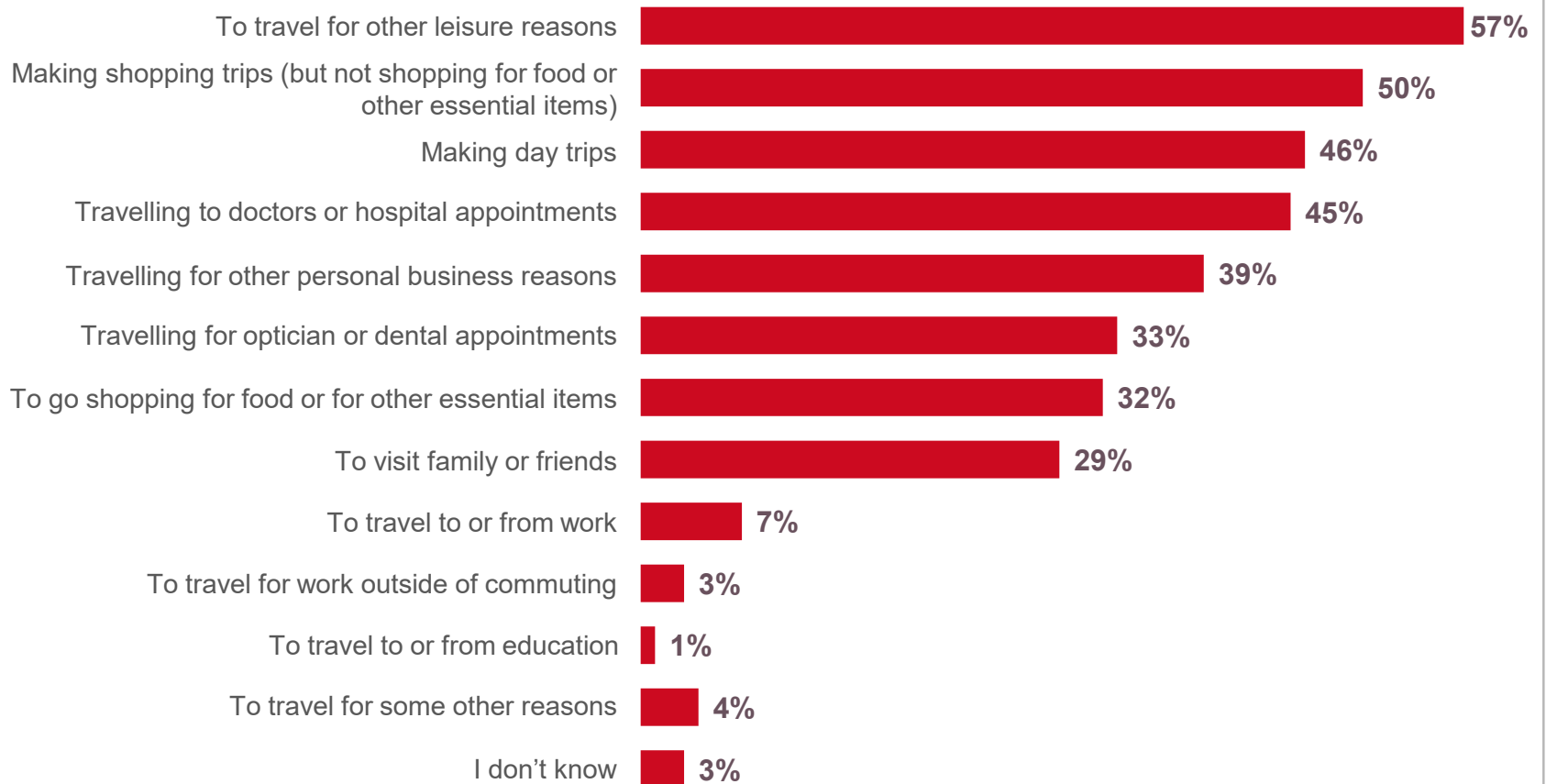
*You said that you might use local buses if you knew more about the services. Which two or three of the following things would it be most useful for you to know about?*



Base: All those not currently using buses who say that they could be encouraged to use buses if they knew more about their local bus service (131)

## Those who say that they could be encouraged to use buses in the future are most likely to say that these journeys would be made for leisure reasons, making shopping or for day trips

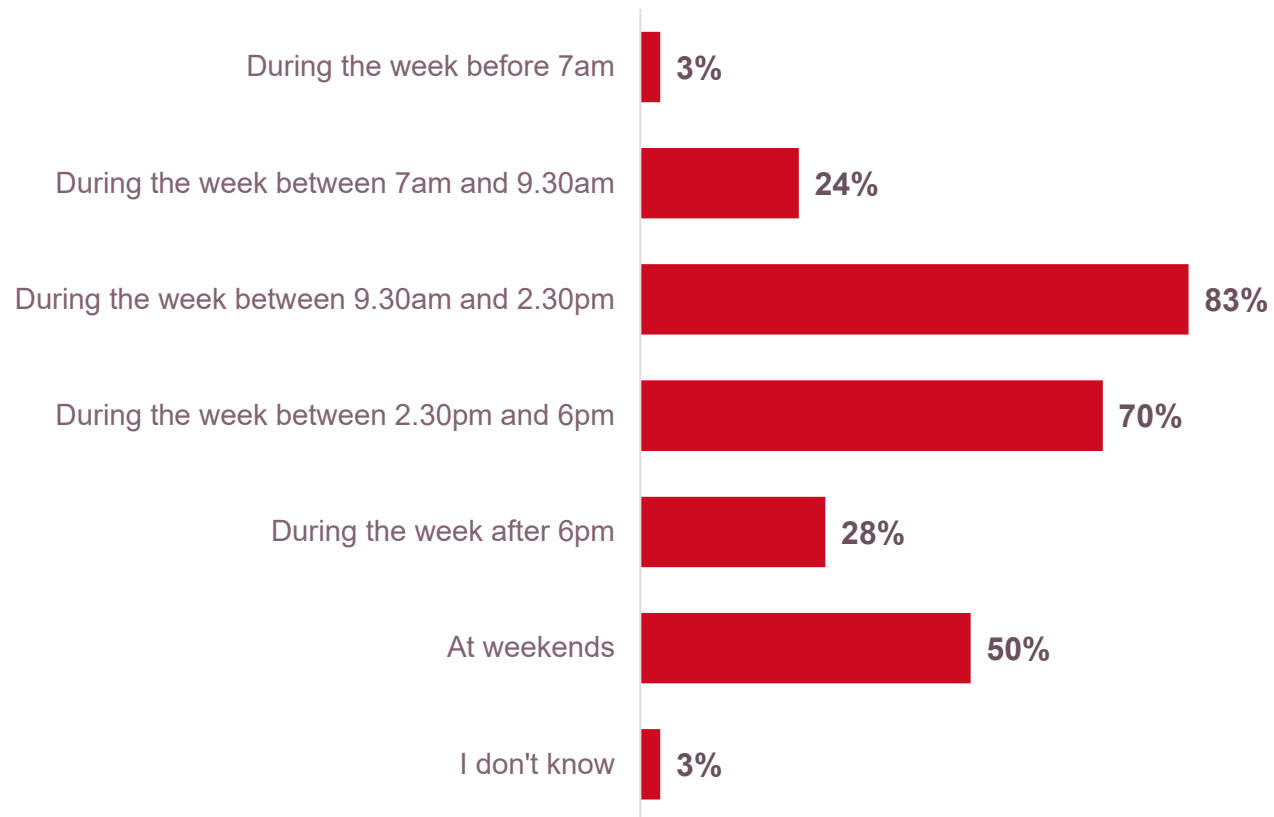
*If you did start to use buses [again], for which of the following reasons do you think you'd be likely to use buses most often?*



Base: All those not using buses who say that they could be encouraged to use buses in the future (682)

## Those who say that they could be encouraged to use a bus are most likely to say that they would do so during the week between 9.30am and 6pm.

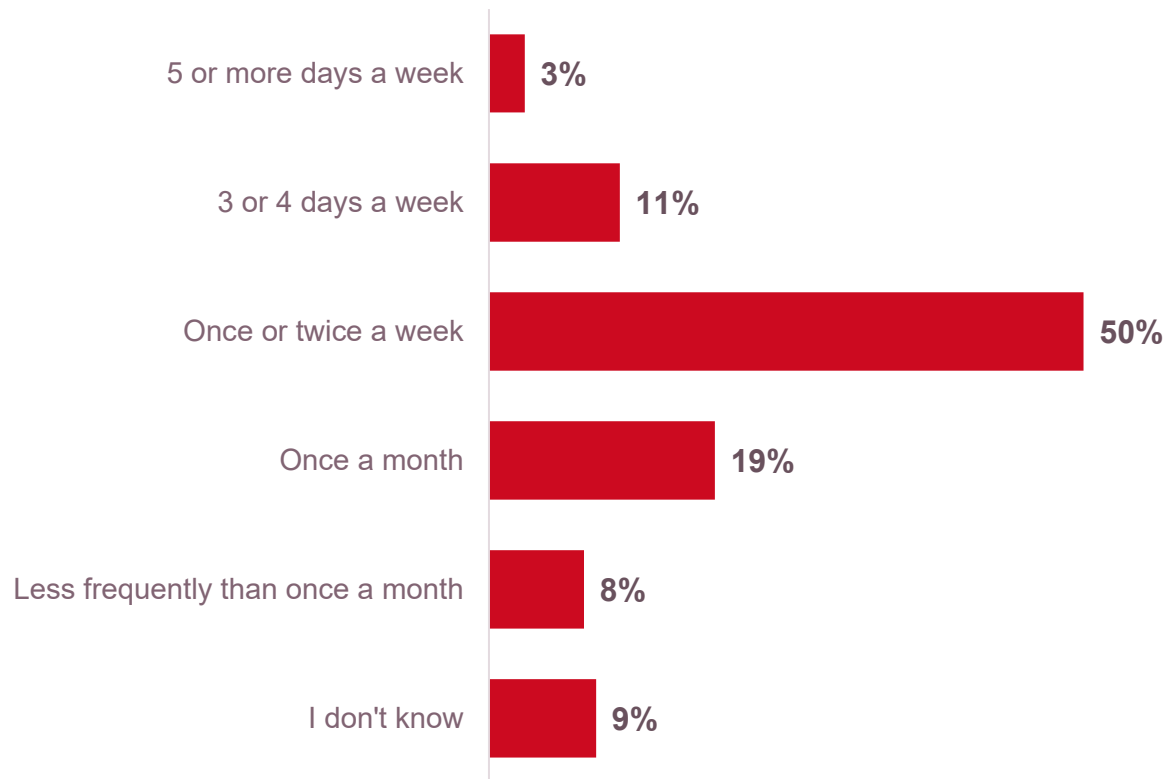
*And at what times of day do you think you would use a bus?*



Base: All those not using buses who say that they could be encouraged to use buses in the future (682)

## More than half of those who say that they could be encouraged to use buses estimate that they might use buses at least once or twice a week

*And how often do you think you might use a bus?*



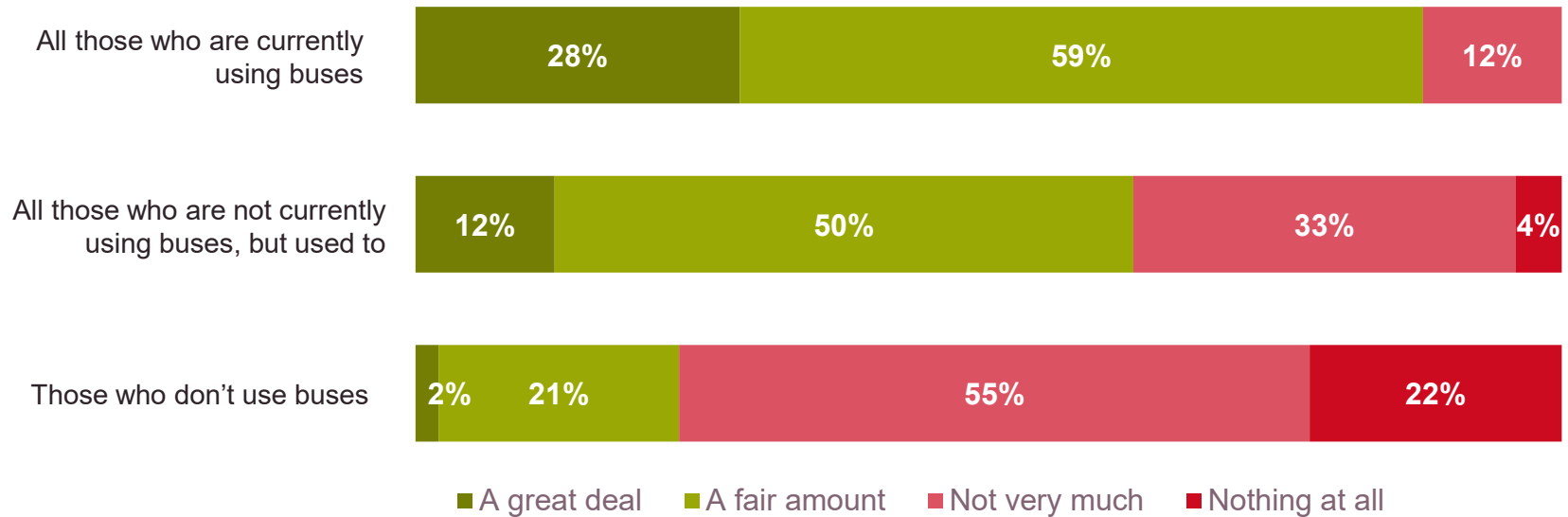
Base: All those not using buses who say that they could be encouraged to use buses in the future (682)

# Knowledge Of Bus Services



**Almost nine in ten of those currently using buses say that they know at least a fair amount about their local bus service. This falls to less than a quarter of those who don't use buses**

*How much would you say that you know about your local bus service?*

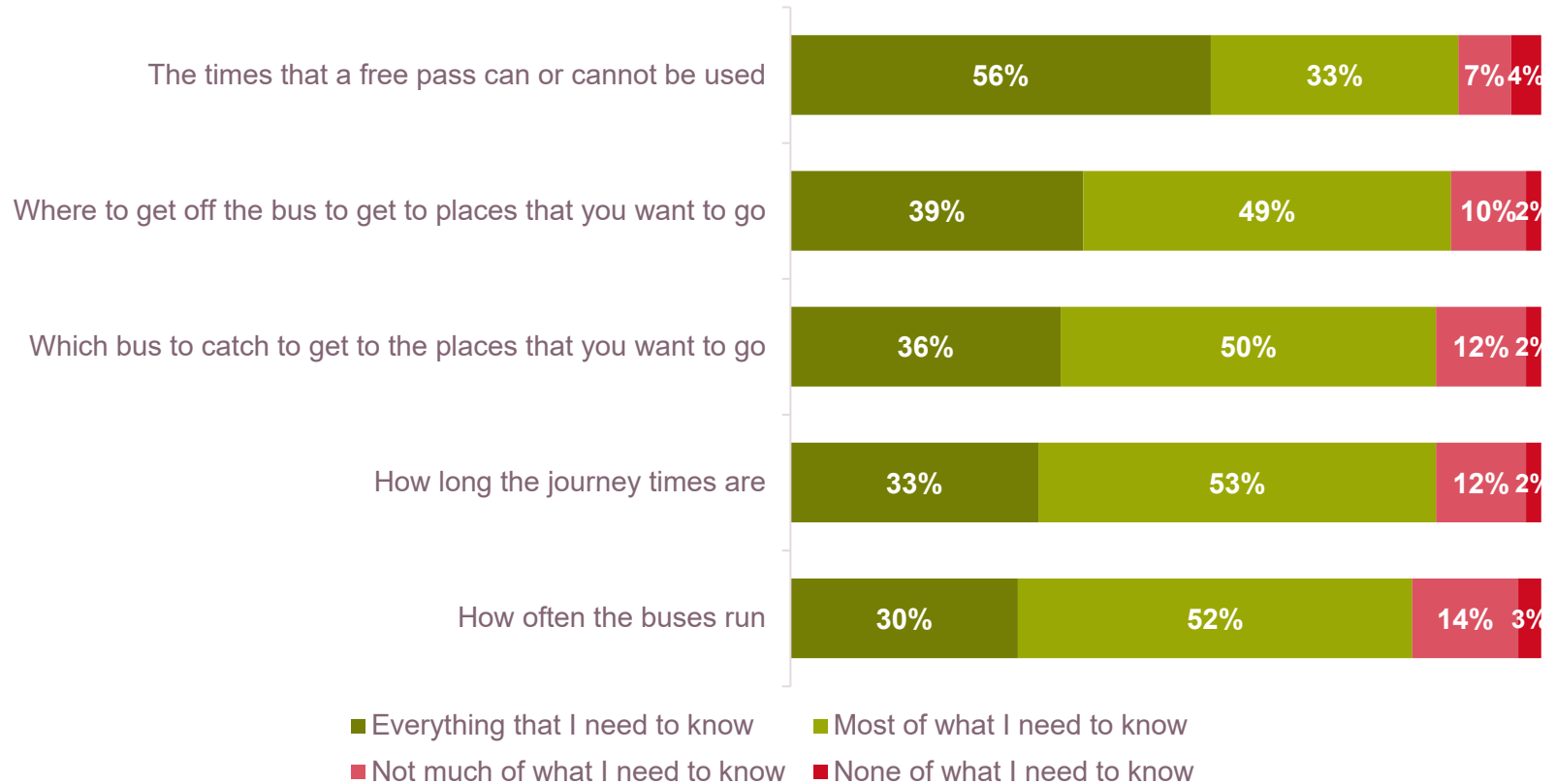


Base: All those currently using buses (4,387). Those who are not currently using buses, bus used to (521). Those who don't use buses (189)



**Almost nine in ten of those who know at least something about their local bus service say that they know at least most of what they need to know about the times that a free pass can be used, which buses to catch and where to get off buses.**

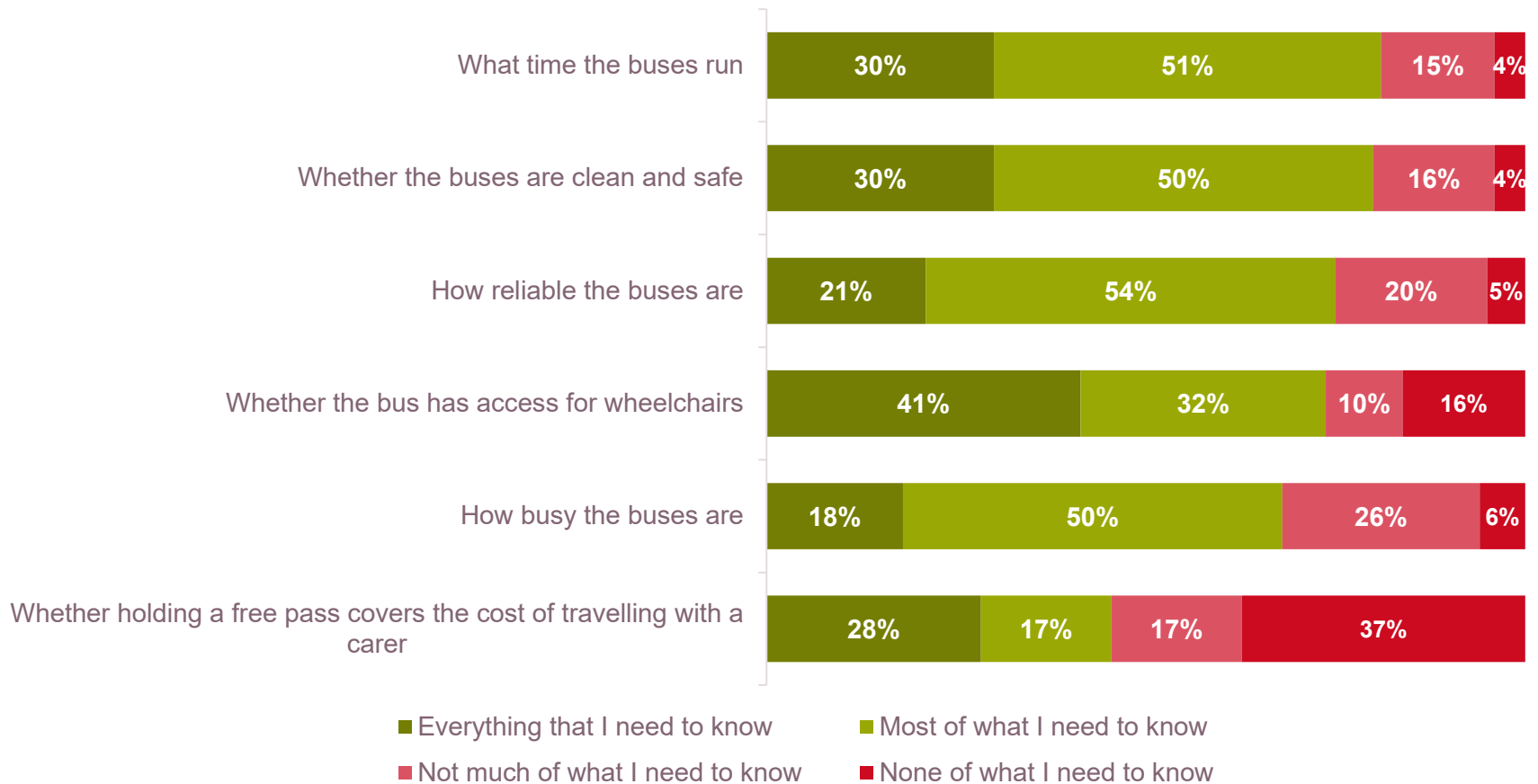
...And how much would you say that you know about each of the following aspects of your local bus service?



Base: All those who know at least something about their local bus service (5,018)

**Those who know at least something about their local bus service are less likely to say that they know at least most of what they need to know about how busy buses are, and whether a free pass covers the cost of travelling with a carer.**

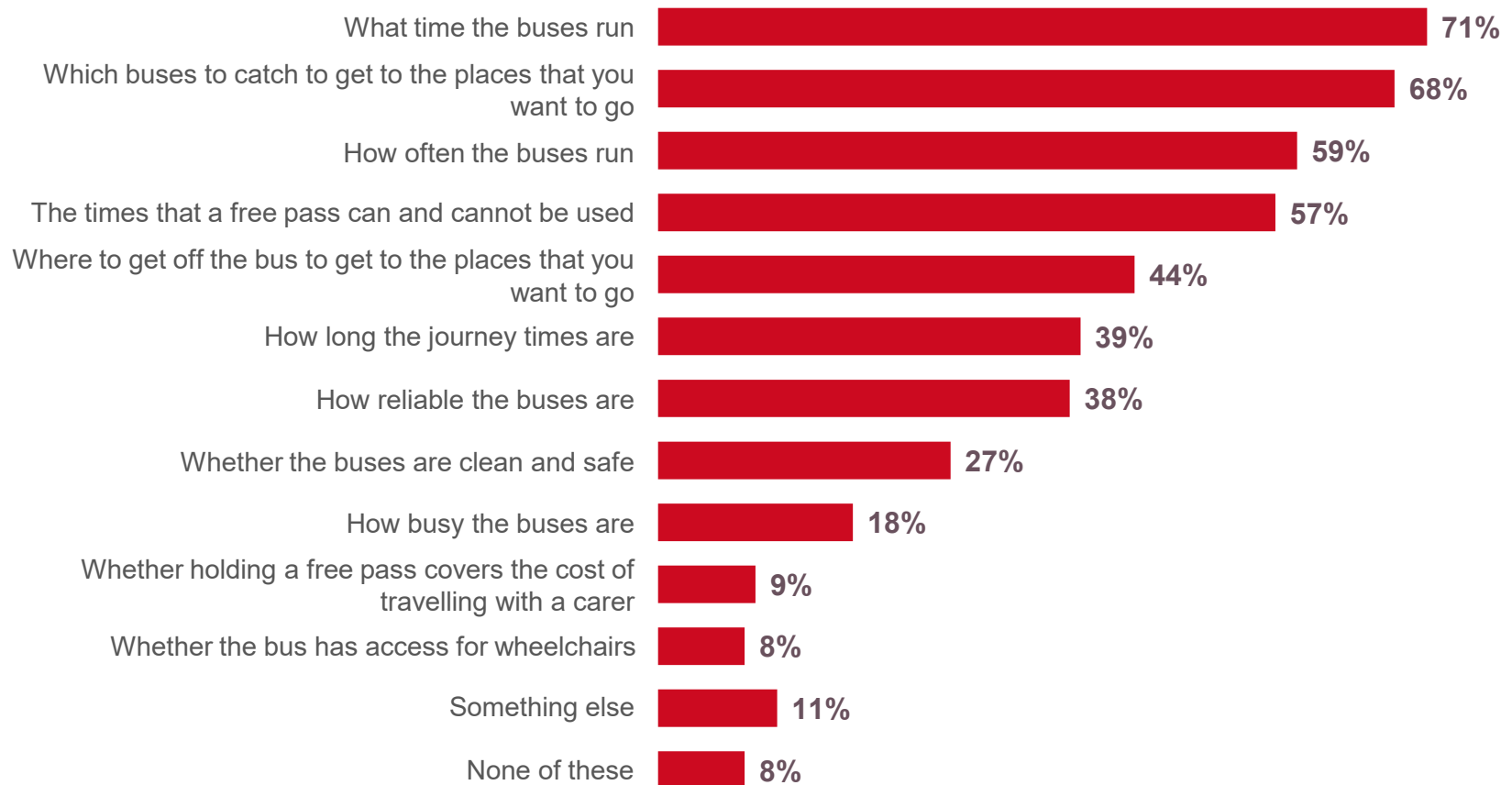
...And how much would you say that you know about each of the following aspects of your local bus service?



Base: All those who know at least something about their local bus service (5,018)

## More than two thirds of those who say that they know nothing about their local bus service say that they would like to know more about what times the buses run and which buses to catch.

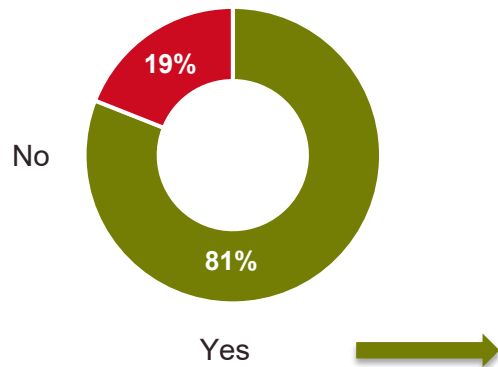
Which, if any, of the following things about your local bus service would you like to know more about?



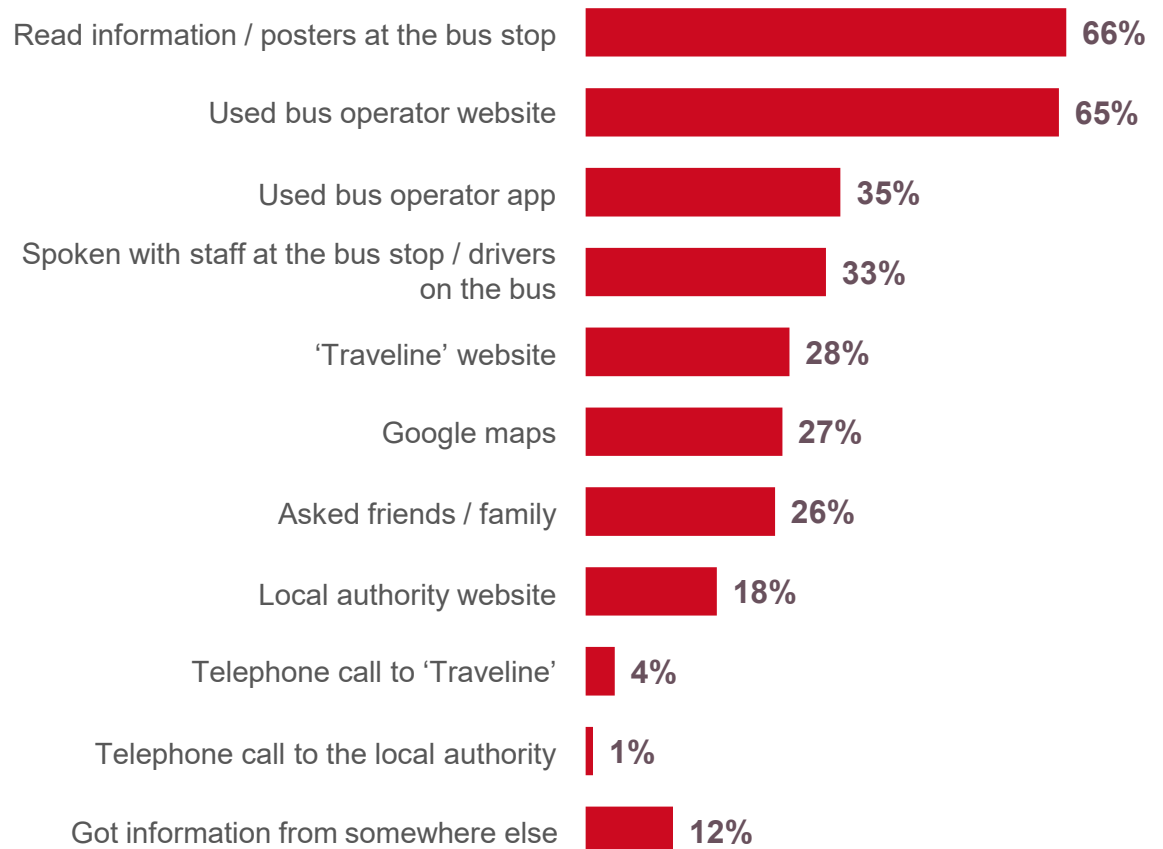
Base: Those who know nothing about their local bus service (79)

## Four in five have looked for information about their local bus. Two-thirds of these people read information at the bus stop or used the bus operator website.

Have you ever talked to others or looked for information about your local bus service?



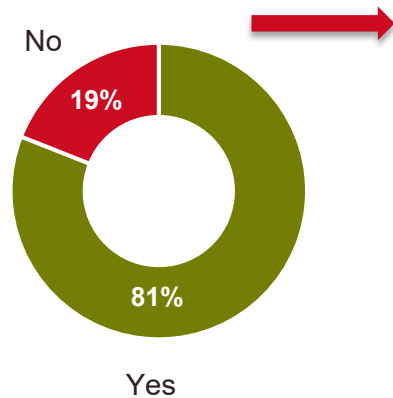
Which of the following sources of information have you used to find out about your local bus service?



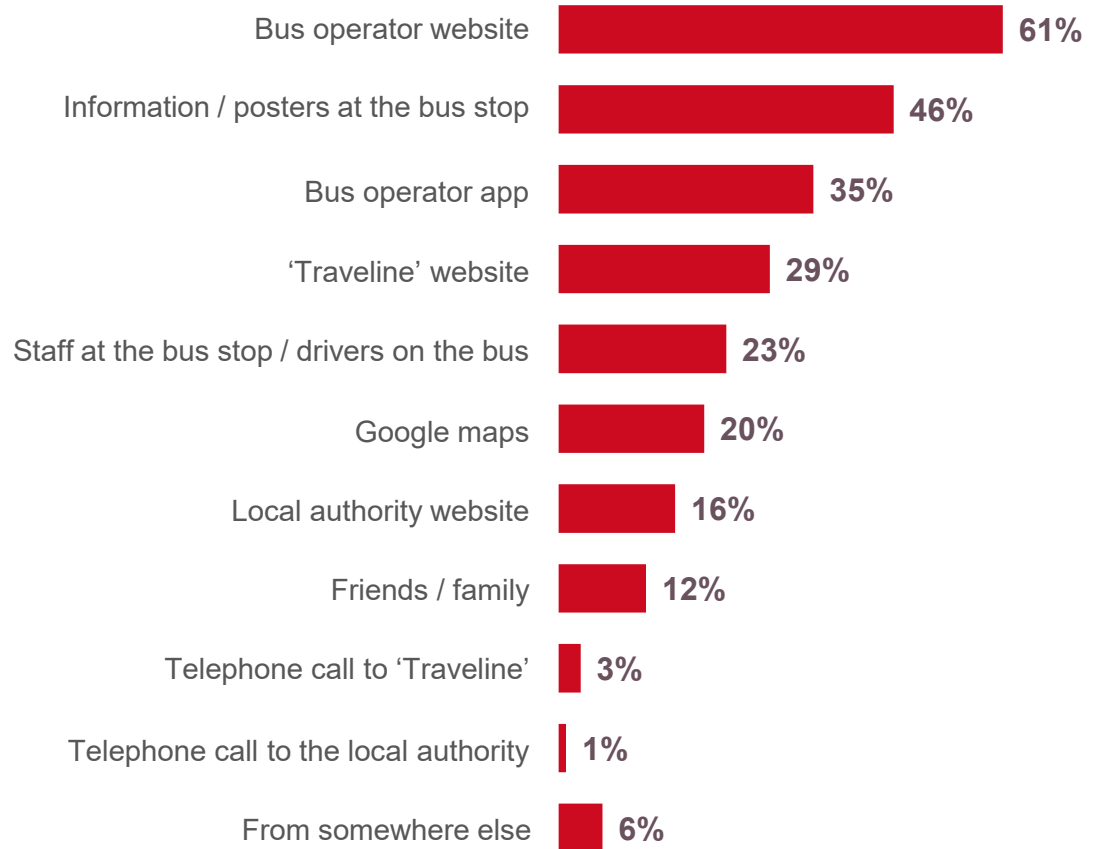
Base: All respondents (5,097). Those who have looked for information about their local bus service (4,132).

**One in five have not looked for information about their local bus. However, if these people were to do so three in five say that they would use the bus operator website to find this information.**

*Have you ever talked to others or looked for information about your local bus service?*



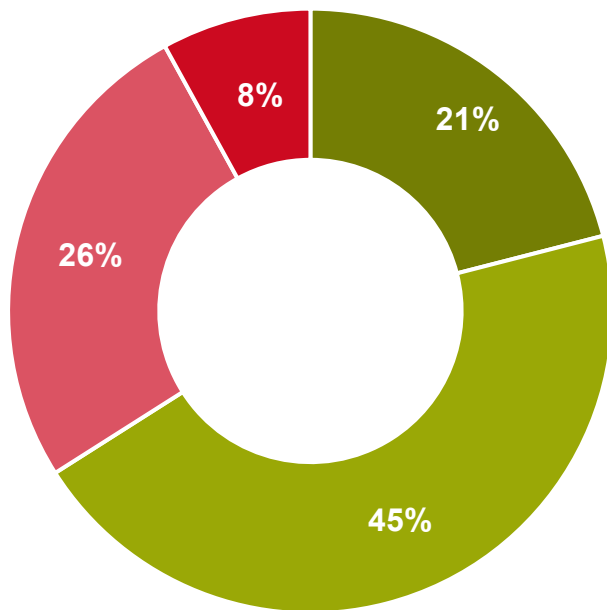
*Which of the following sources of information do you think you would use to find out about your local bus service?*



Base: All respondents (5,097). Those who have not looked for information about their local bus service (965).

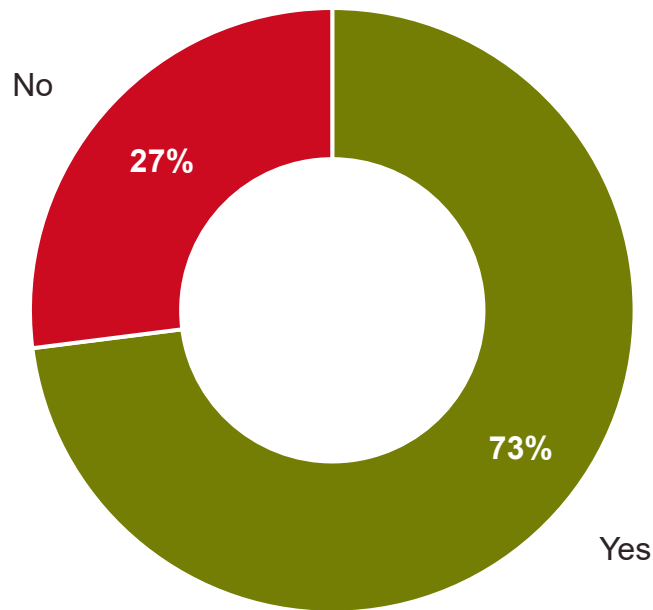
## Two thirds say that they know at least a fair amount about using a free pass to make journeys outside their local area. Three quarters have done so.

*How much would you say that you know about using a free pass to make journeys on buses outside your local area?*



- A great deal
- A fair amount
- Not very much
- Nothing at all

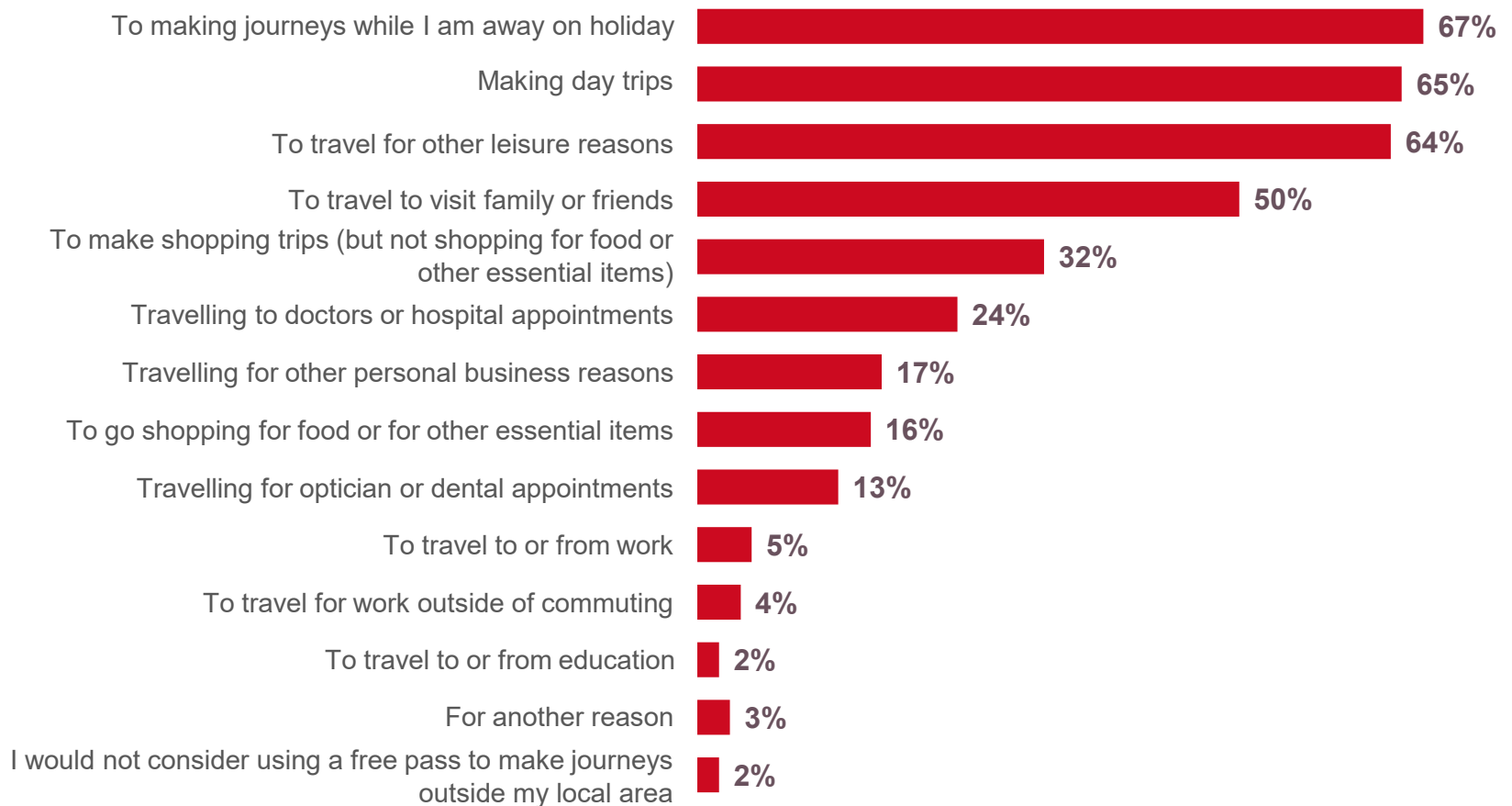
*Have you ever used a free pass to make journeys on buses outside your local area?*



Base: All respondents (5,097).

## Around two thirds say that they might consider using a free pass to make journeys while away on holiday, to make day trips, or to travel for other leisure reasons on buses outside their local area.

*For which of the following reasons might you consider using a free pass to make journeys on buses outside your local area?*



Base: All respondents (5,097).

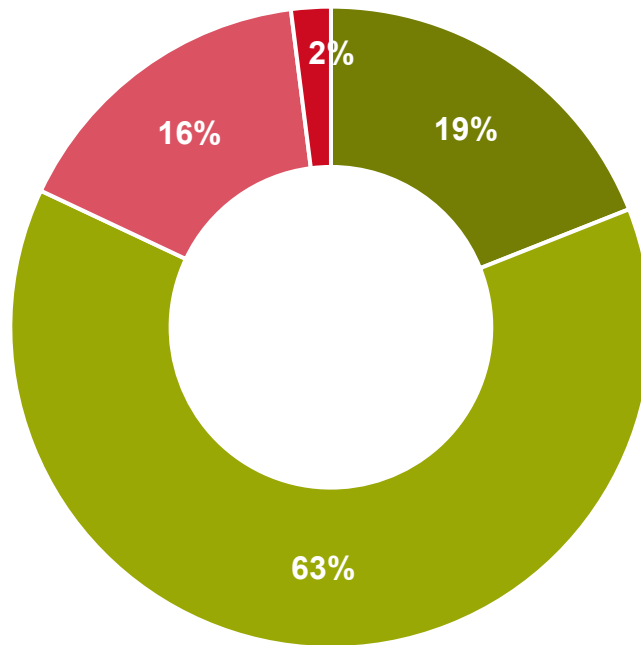
# Bus Use and Covid





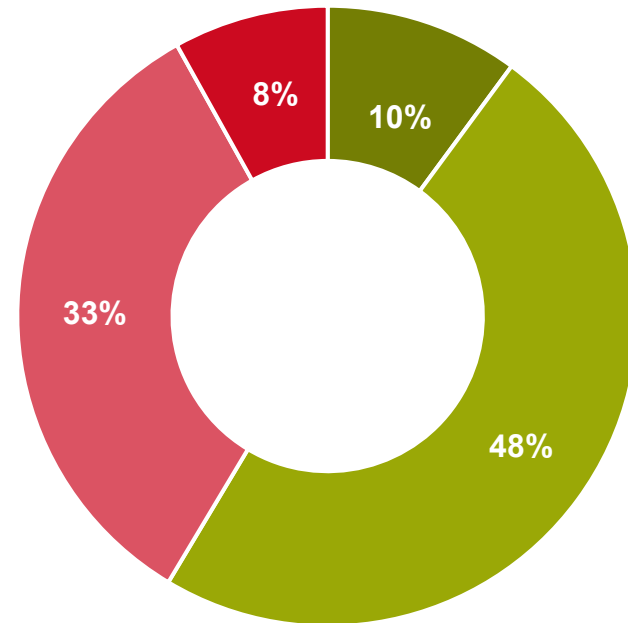
**82 per cent of those who are currently using buses at least once a month say that they feel safe doing so. 58 per cent of those who are not using buses as regularly, or not at all, say that they would feel safe using a bus.**

*Specifically in relation to coronavirus, how safe do you feel at the moment when using buses?*



■ Very safe      ■ Fairly safe

*Specifically in relation to coronavirus, if you had to make a journey by bus at the moment, how safe would you feel?*

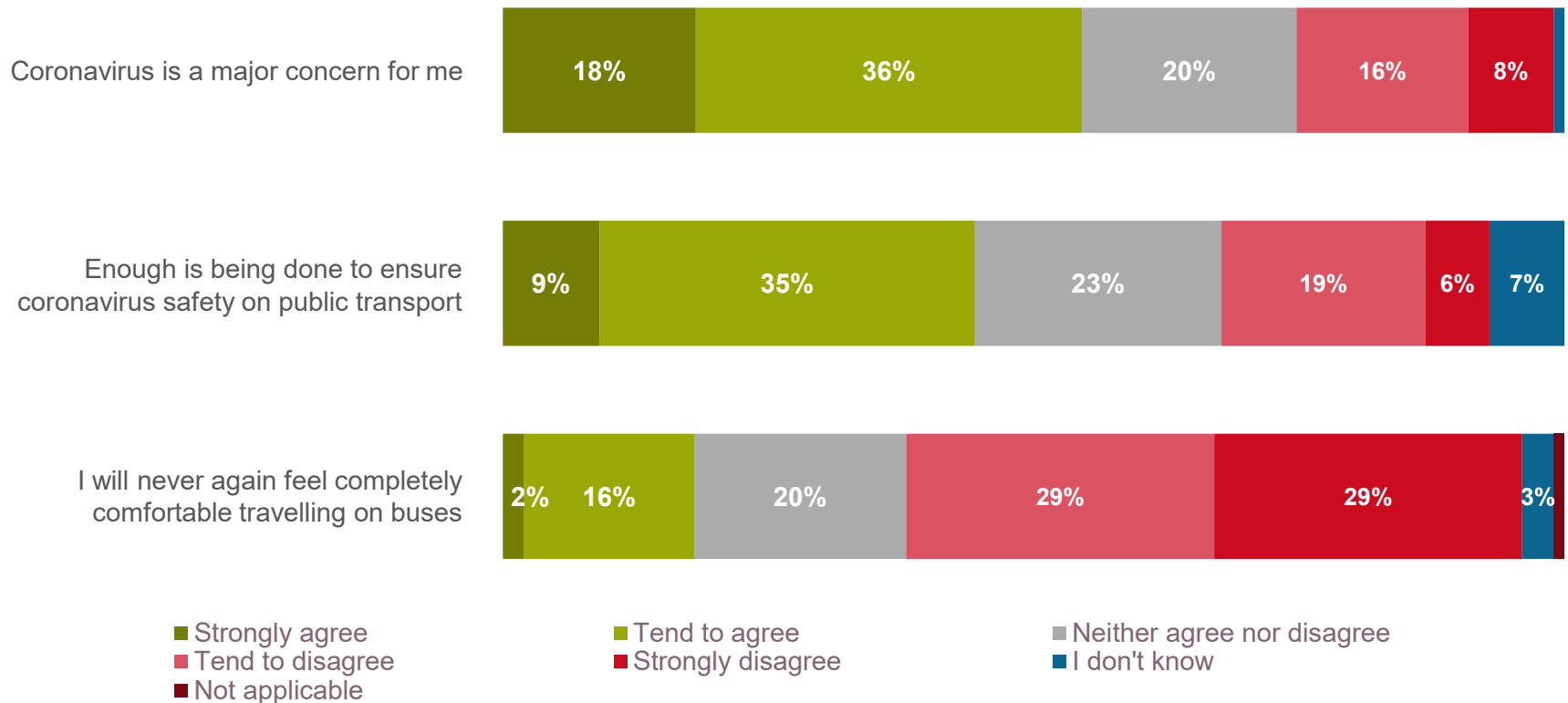


■ Not very safe      ■ Not at all safe

Base: All those currently using buses at least once a month (3,877).  
Those currently using buses less than once a month or not at all (1,220)

**54 per cent say that coronavirus is a major concern for them, while more than two in five agree that enough is being done to ensure coronavirus safety on public transport. Almost one in five say that they will never again feel completely comfortable travelling on buses**

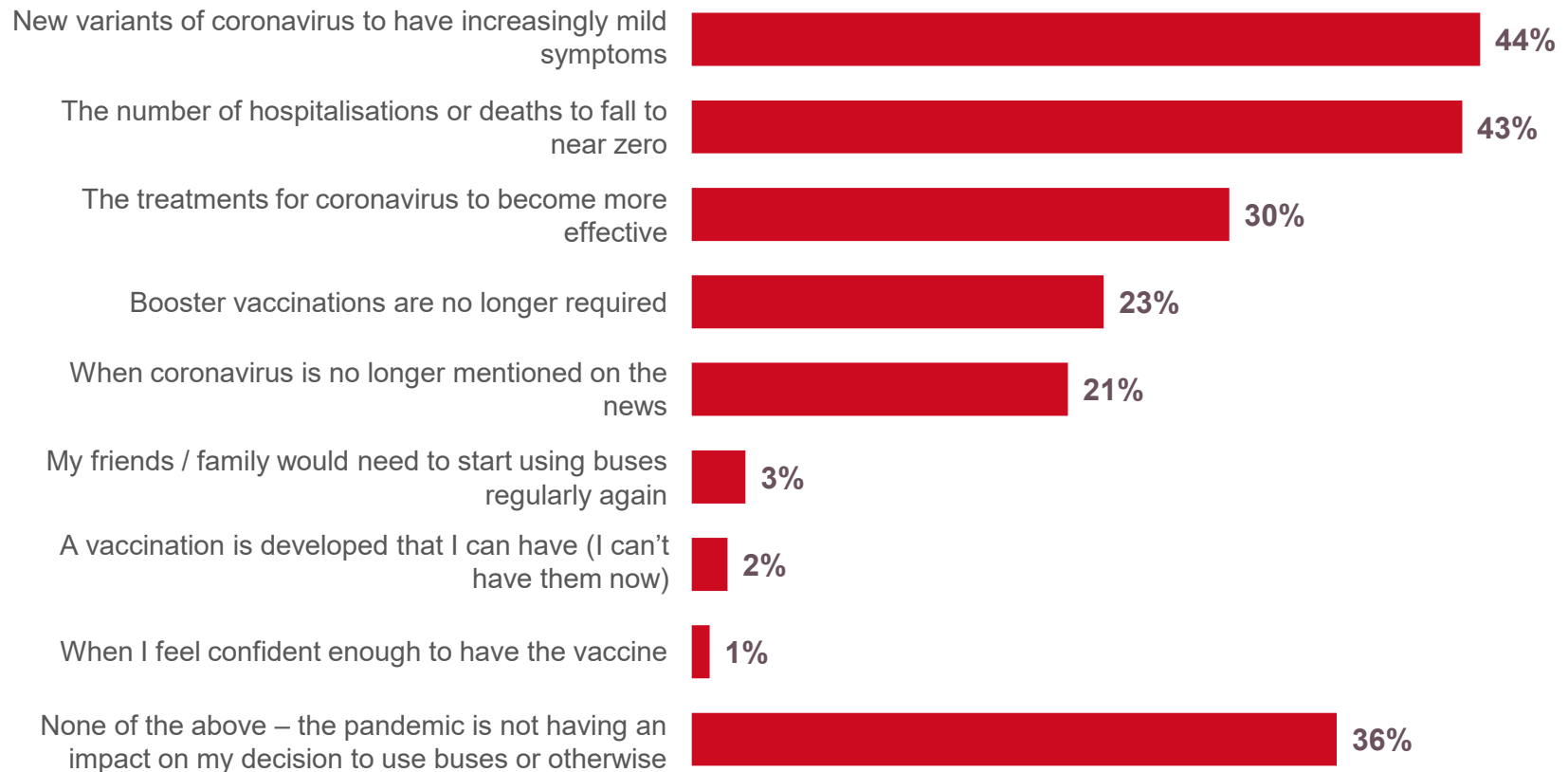
*To what extent do you agree or disagree that..?*



Base: All respondents (5,097)

**For a third the pandemic is having no impact on their decision to use buses. More than two in five say that they will need new variants to be increasingly mild or the number of hospitalisations to fall to near zero in order to feel unconcerned about using a bus**

*Which, if any, of the following events would need to occur to convince you that the coronavirus pandemic had receded sufficiently for you to be unconcerned about using a bus?*



Base: All respondents (5,097)

# Conclusions and recommendations



# Conclusions (1)

- More than half of concessionary pass holders say coronavirus is still a major concern. Many are either making fewer bus trips or have stopped using the bus altogether since the start of the pandemic.
- Current users would be most likely to travel more if the bus service improved: if the network was extended, if buses were made more frequent and if services were more punctual. They would also make more bus trips if time restrictions on the use of their pass were removed.
- A majority of lapsed users have stopped using the bus because they feel buses are less safe in relation to Covid than other modes of transport. They agree with current users about the need for an extended network, more frequent and reliable services and a removal of time restrictions on the use of their pass. However, the thing most likely to encourage them to return to the bus would be if more were done to ensure protection against coronavirus.
- Among non-users, an extended network and more frequent buses are top of their list of improvements, but knowing more about local bus services (especially frequency, routes and reliability) also scored highly.

## Conclusions (2)

- The number of bus trips made by concessionary pass holders is unlikely to return to pre-pandemic levels until the anxiety about coronavirus subsides.
- Two thirds of those using the bus less frequently than before the pandemic say they are making fewer journeys overall, for example because they are working from home or having shopping delivered or for other reasons
- With the exception of simpler ticketing and lower fares, concessionary pass holders appear to want the same things that fare paying passengers want – frequent and reliable buses, taking them to where they want to go.
- They also want to be able to use their passes whenever they want to travel, without the current timing restrictions
- While most pass holders feel reasonably well informed, better publicity and explanation of services could encourage some users to make more bus trips and some non-users to give buses a go.

# Recommendations and questions

- Use Bus Service Improvement Plans\* or other funding to enhance the network, improve frequencies and introduce bus priority measures to make buses more reliable.
- While recognising reasons for the current restrictions, are there local opportunities to allow users to travel on their concessionary pass in the morning? Or to charge a reduced fare at these times to stimulate demand?
- Work with passengers and their representatives to target communication and so build confidence about matters on which pass holders feel least well-informed: the reliability of services, the busyness of the bus, wheelchair access and travelling with a carer.
- While it may still be important to continue to communicate the efforts being made to make bus travel feel safe, what more, if anything could operators realistically do to reassure passengers?

\* In England

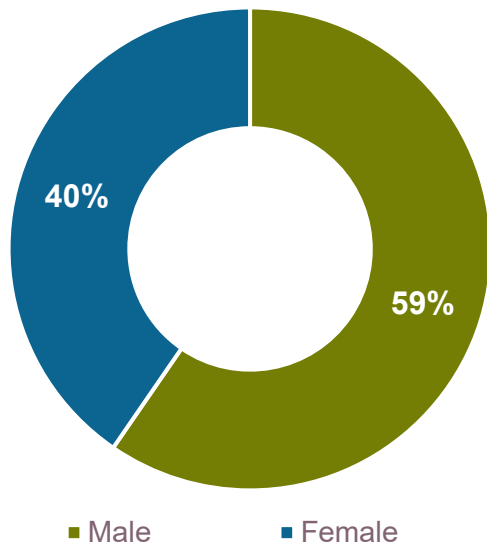
# Respondent profile



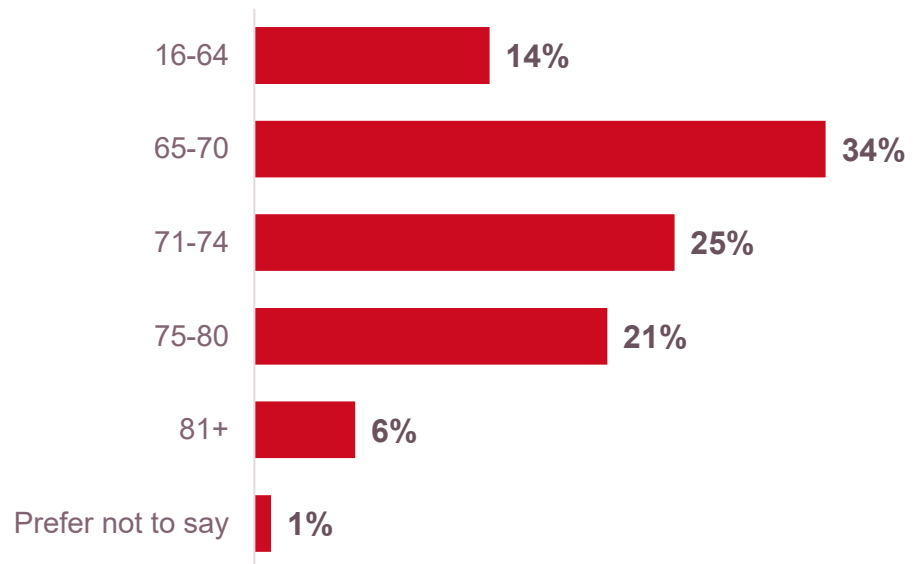


# Profile of respondents by gender and age

Gender



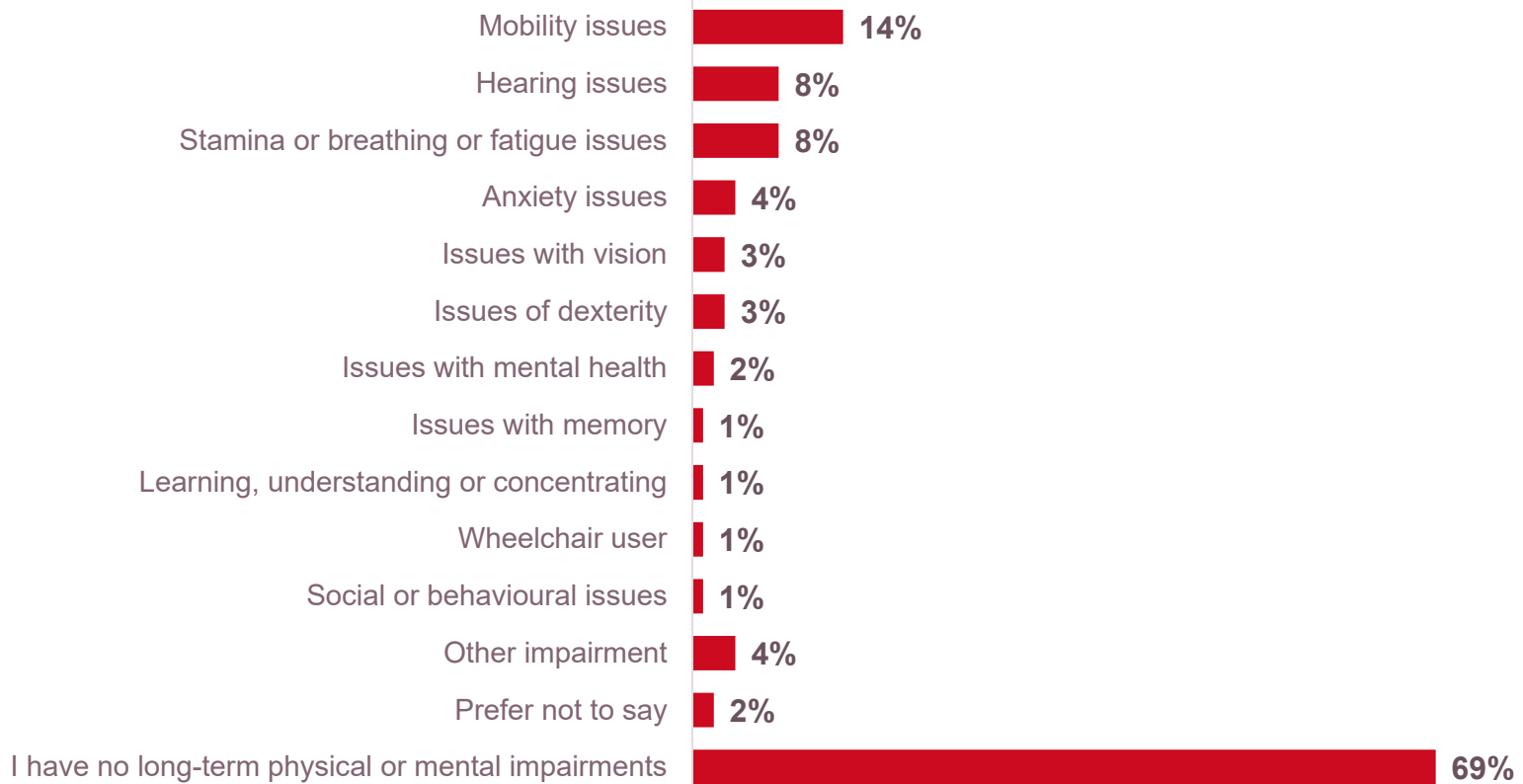
Age



Base: All Respondents (5,097).

# 69 per cent of respondents have no disability

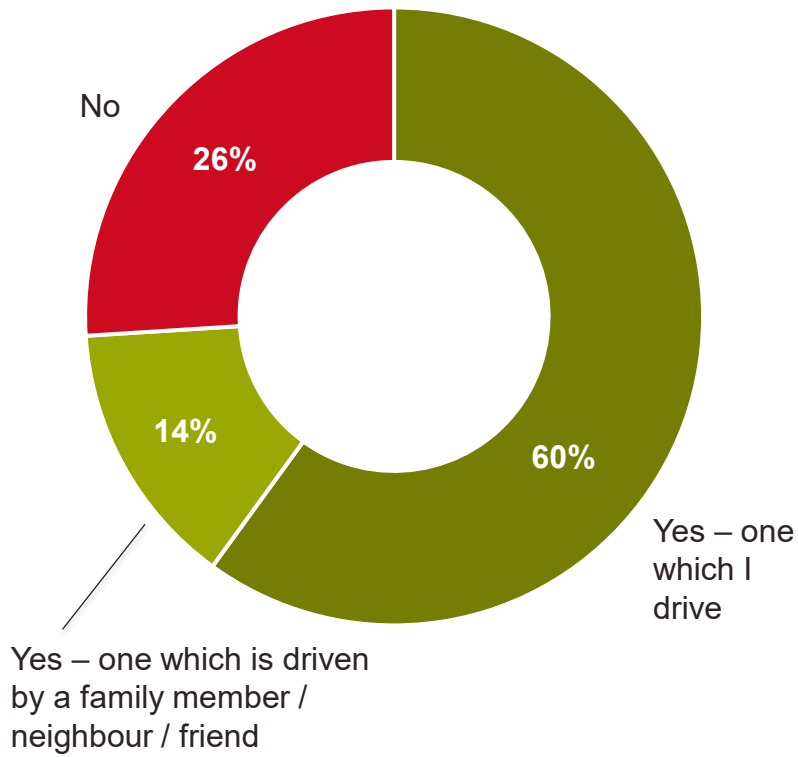
*Do you have any of these long-term physical or mental impairments which limit your daily activities or the work that you can do?*



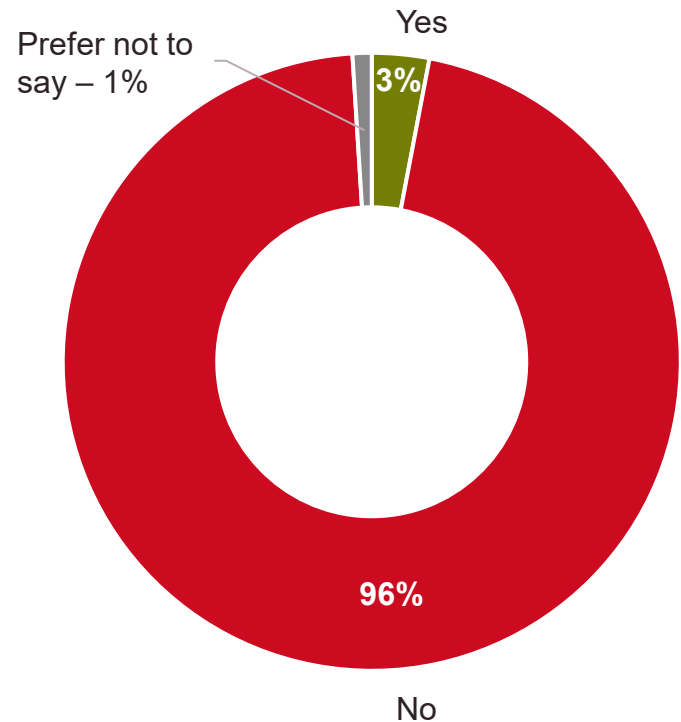
Base: All Respondents (5,097).

# Three quarters have access to a car and the majority have not been refused a driving licence on the grounds of physical fitness.

Do you have access to a car?



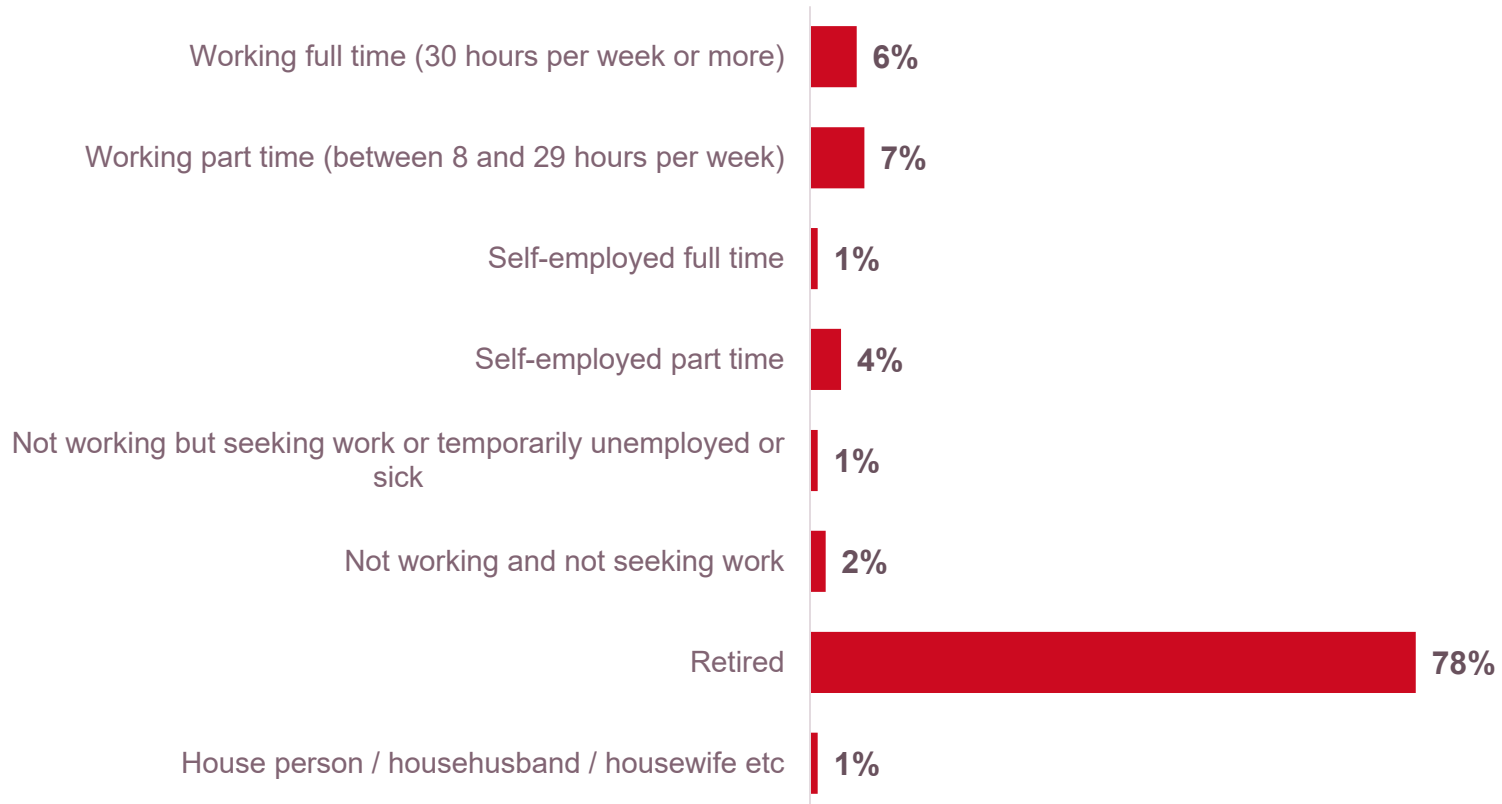
Have you ever been refused a driving licence on the grounds of your physical fitness?



Base: All respondents (5,097).

# 78 per cent of respondents are retired

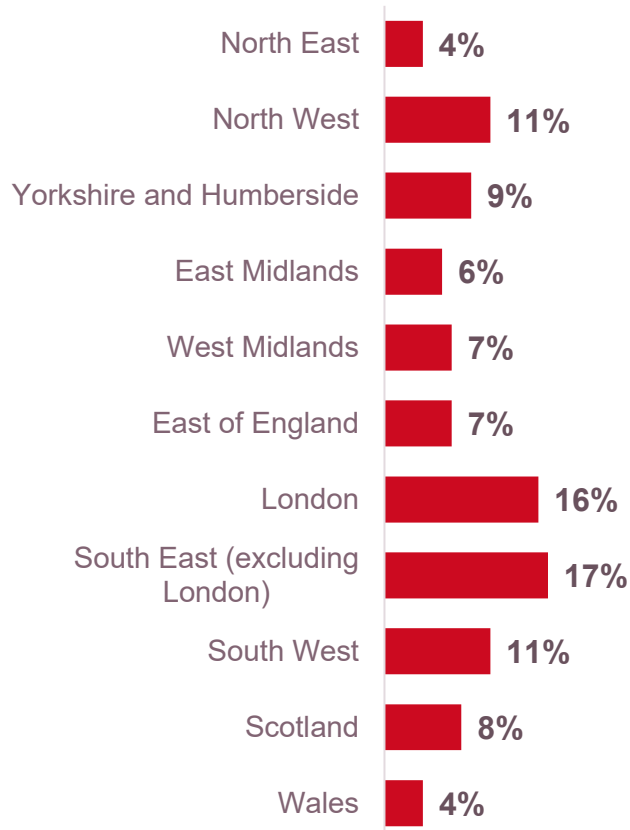
*Which of the following best describes your current working status?*



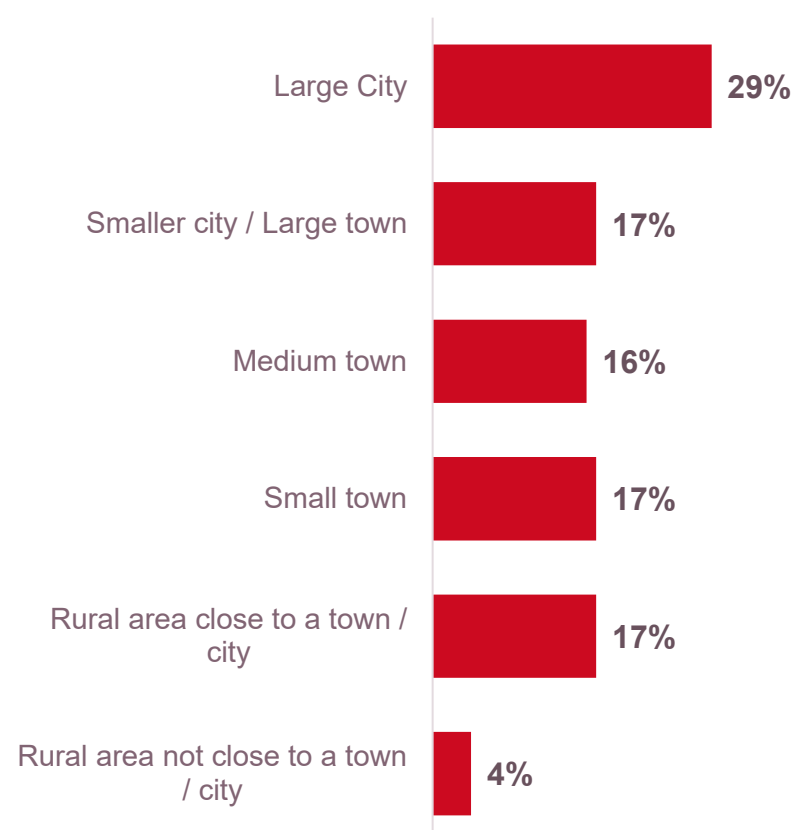
Base: All Respondents (5,097).

# Profile of respondents by region

*In which of the following regions / countries of the UK do you live?*



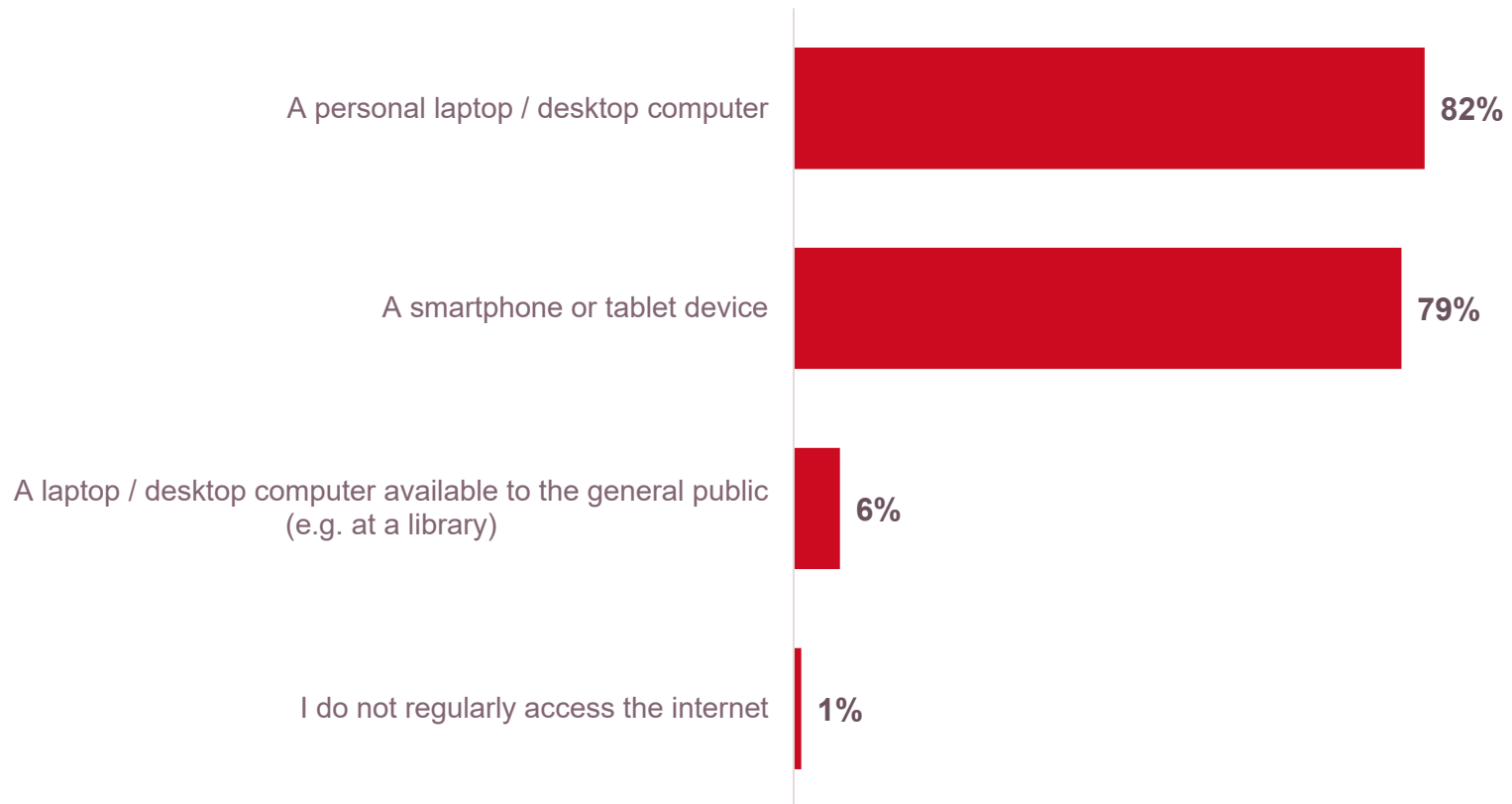
*Which of the following best describes where you live?*



Base: All Respondents (5,097).

# The majority of the respondents access the internet at least once a week

*Do you regularly access the internet via any of the following devices? (By 'regularly' we mean at least once a week).*



Base: All Respondents (5,097).