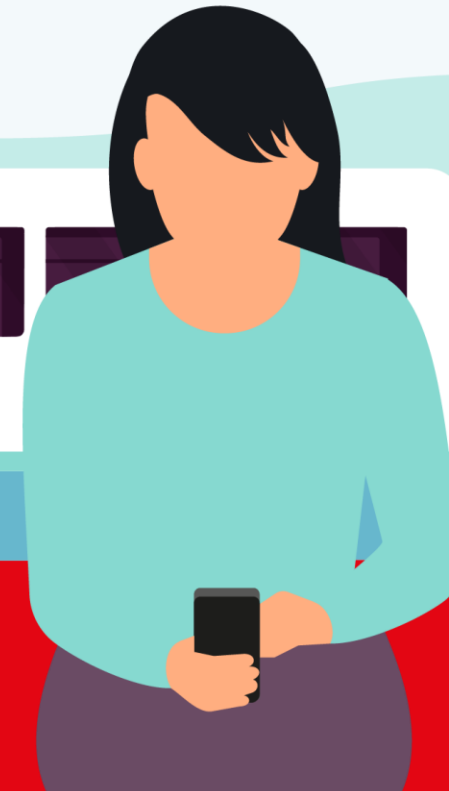


Motivations and barriers to bus usage

June 2023



Introduction



This report focuses on the new reality of bus usage post-covid and what challenges and opportunities this poses to the industry.

We wanted to understand how many of the habits and attitudes which emerged during the pandemic have remained, what impact the state of the economy and the cost of living crisis have had on them, and how far the changes made to bus services have themselves affected bus use.

Transport Focus undertook research in March 2022 and again in March 2023 to better understand the new and emerging motivations and barriers to bus use. We hope this report provides bus operators, transport authorities and Governments with insight to help shape future policy and funding initiatives to encourage more people to give bus a go.

During the pandemic, lockdowns and restrictions forced people to reconsider their travel patterns. While many workers had no option other than to continue to attend their places of work, a significant proportion of the workforce was encouraged to work from home, while others managed the risk of infection by going out less and getting their shopping delivered. Some felt safer in their own cars than using public transport.

Bus use, which had generally been falling across much of the previous decade, has steadily risen since the end of the pandemic, returning to 80 - 90 per cent of the 2019 - 2020 market. Those travelling on concessionary passes have been notably slower to return and are the subject of a separate piece of detailed Transport Focus research.

Summary

In this research we looked at three groups:

- current users: 74 per cent of our sample say they currently use bus (up from 53 per cent last year), with 29 per cent using buses at least every week
- lapsed users: 11 per cent (down from 15 per cent last year)
- non-users: 15 per cent (down from 32 per cent last year).

The number of current users making fewer bus journeys has fallen since last year, and is now similar to the number travelling more often:

- a quarter of these are simply travelling less, for example because they are working from home or because of changes to their health, or they are more likely to avoid the bus because of residual fears about Covid.
- they also cite cuts to bus services, unreliability, last-minute cancellations, crowding and fare increases.

Some of those who told us last year that they used to use buses have now started using them again.

- Of those that haven't, better value fares, more frequent buses and more reliable services would be most likely to encourage them to return.
- However, a quarter say there is nothing the industry can do to win them back.

The proportion of non-users has dropped significantly since last year.

- Most of them say they prefer their cars.
- Some say they could be encouraged to use buses, citing the same issues as lapsed users.
- However, half say there is nothing that would encourage them to use buses.

There is an increase over the last year in the appetite for knowing more about bus routes, timetables, reliability and fares.

Key survey findings

1

Who uses buses has changed

There is a sizeable group who used to use the bus who have simply not returned at all since Covid and many users are using it less than before. However, usage has increased in the last year. Easing of Covid restrictions and lessened concern over infection has encouraged this.

4

The capped fare scheme in England is providing value for money to users

Value for money is always important to bus users and this scheme has helped to tick that box. Half who have used the scheme have been encouraged to use the bus more because of it.

2

The barriers to using bus are clear

A preference for the car among non-users will be hard to overcome. Perceptions that the bus is inconvenient and takes too long also prohibit people from giving it a go.

5

A lack of knowledge about services presents an opportunity for the industry.

Improving promotion of services - together with a value for money hook such as the capped fare scheme – could encourage lapsed and non-users.

3

There is some appetite for using the bus more

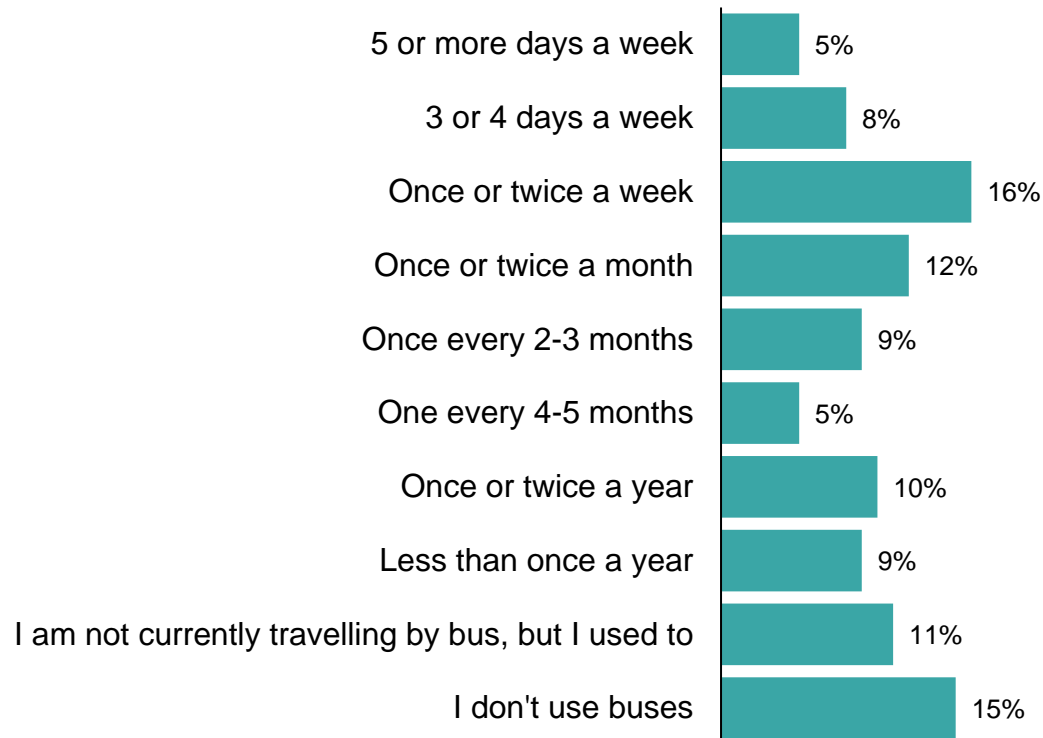
With this there are clear requirements around what is needed. A more comprehensive network and improved reliability of services would encourage users to use the bus more.

Current use of buses



A third of people in the survey are using the bus at least weekly

How often do you currently travel by bus?



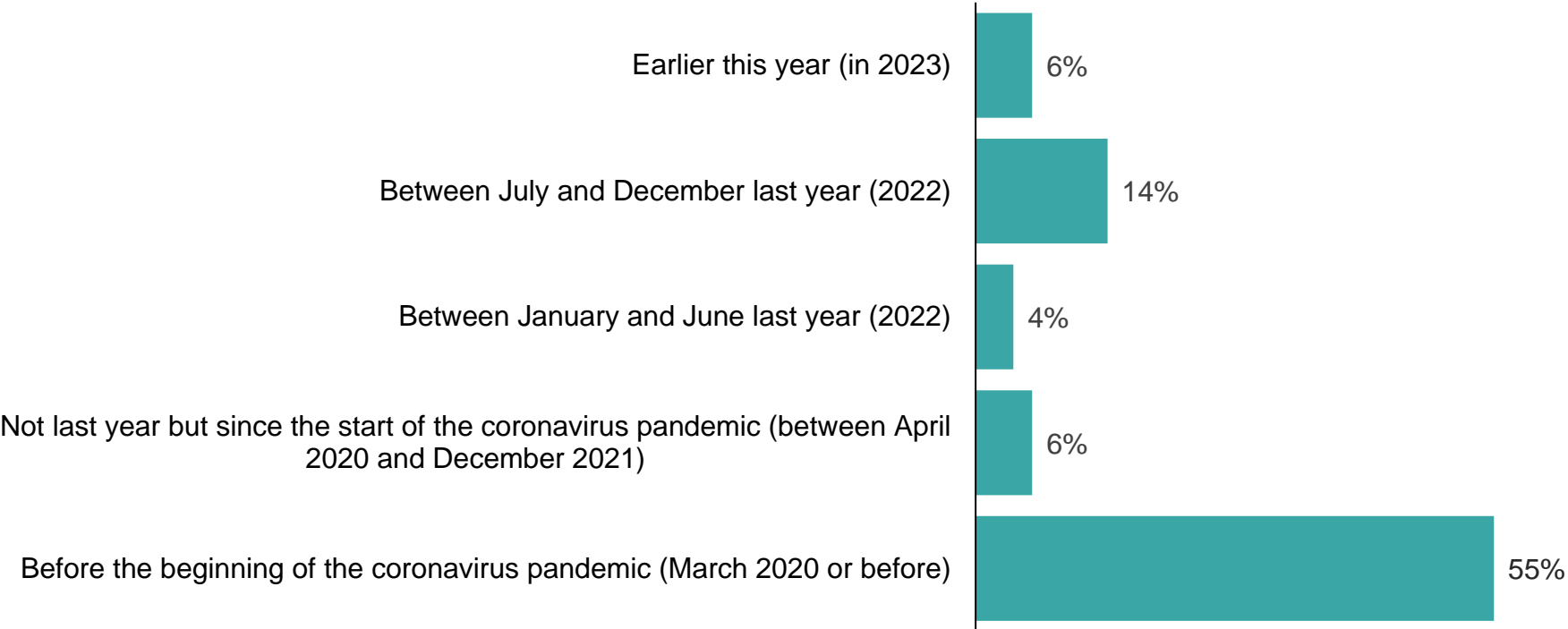
29% At least weekly

Usage varies by region. 'At least weekly' usage is highest in London at 60%. Highest other region in England is North East at 30%, and lowest in England is South West at 16%.

The proportion of people not using buses has dropped significantly since last year (from 32% to 15%). The number of lapsed users has also reduced (from 15% to 11%).

Over half who no longer use the bus last did so before the pandemic began in March 2020

Approximately, when did you last travel by bus?



Base: All those who are not currently using buses, but used to (216)

Covid prompted a change in usage of public transport that continues to have a lasting effect for some

“Used less because of Covid and now it just seems easier to go by car unless it is quicker and easier to use a bus.”

Female, 72, Scotland

“My use of buses specifically decreased with the onset of Covid/the pandemic/lockdown measures and has remained at that lower level to the present day, despite the lifting of lockdown measures.”

Male, 28, South West

“I got out of the habit of using public transport during Covid and haven't really gone back to it. I have used the bus more during the last 12 months and will continue to do so.”

Male, 63, Scotland

“My social activities haven't fully bounced back since Covid so it's still not back to normal, however for work starting to visit more offices/suppliers for meetings... Ditto for personal travel - been using buses/trains to get to airports, whereas a year ago I wasn't doing any travel requiring bus/trains.”

Male, 40, East Midlands

“I have got out of the habit of using public transport during Covid and also don't go out as much.”

Female, 60, South West

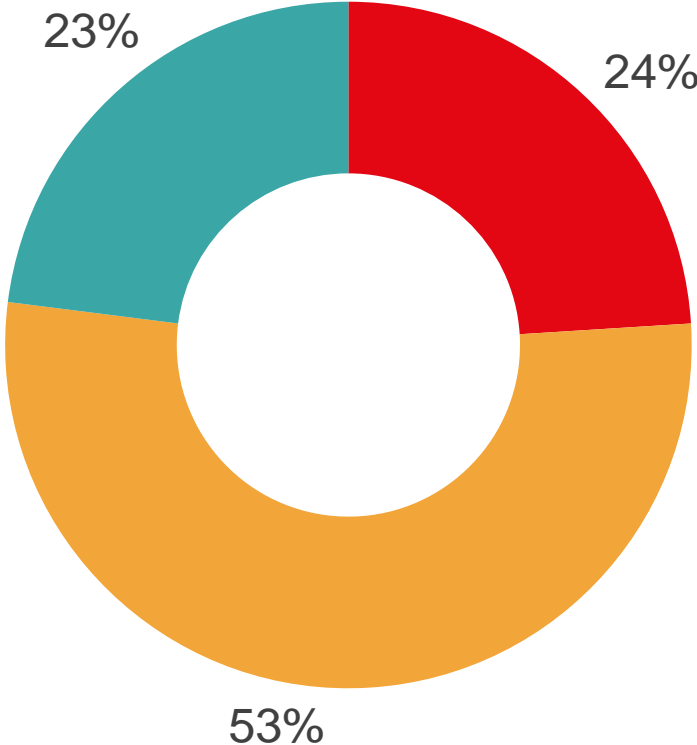


Nearly a quarter of current users have increased their bus usage in the last year, but a similar proportion are using the bus less

Thinking about how you used buses a year ago and how you use them now. Would you say....?

In 2022, two fifths were using the buss less than they did before the pandemic.

- More often than I did previously
- Frequency has not changed
- Less often than I did previously



Base: All those who are currently using buses (2023 = 1495)

Price cap on fares and increased fuel costs are motivations to use the bus more often

“Used the buses a little more with price cap on fares, used trains a little less with strikes and increased train fares.”

Female, 52, North West

“I have used the bus more as firstly the price of petrol is expensive so using the bus saves me money and the local service now calls at the hospital which is good for appointments...”

Female, 77, North West

“I sometimes use public transport more to save myself money on fuel costs.”

Male, 38, North West

“I am using buses more partly because it's been winter, and partly to save on fuel costs. I am blessed to have an excellent bus service where I live - there is a bus every 15 minutes to the places I go most often.”

Female, 70, South West

“I've started using buses more often, particularly after the fixed price single fares were introduced.”

Male, 53, South East



Getting out and about more is another primary reason people have used the bus more

"I use bus more as work has required me to be in the office more."

Female, 24, South West

"I'm going out more and meeting people so need to use the buses more to travel around."

Male, 35, South East

"I am now off maternity leave. And it's so easy to take my little girl on the bus with her buggy, we go out and about together frequently on the local bus to town."

Female, 31, Scotland

"Now retired I use the train a little less, but rather than driving I now quite often use the train and occasionally buses to go out socially during the week and at weekends where I never used to."

Male, 65, London



"Using bus more for leisure since daughter started school."

Female, 34, North East

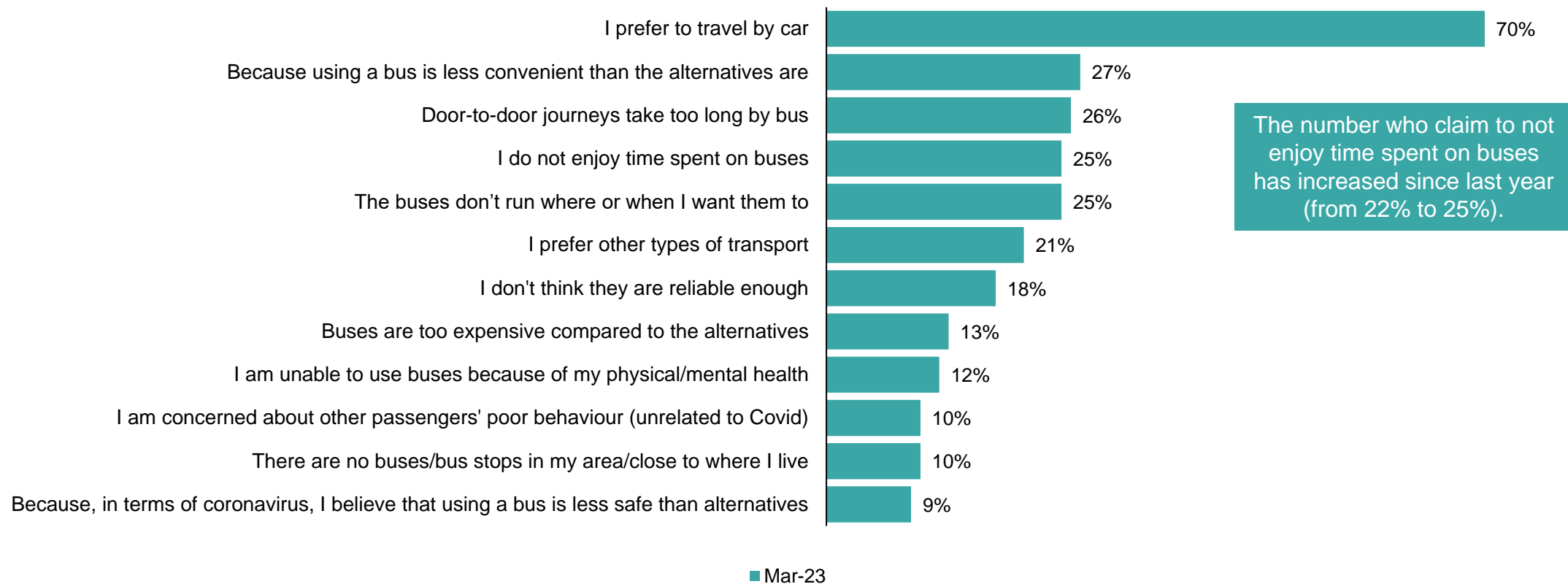


The barriers to using bus are clear



The majority of non-users don't use the bus because they prefer to travel by car

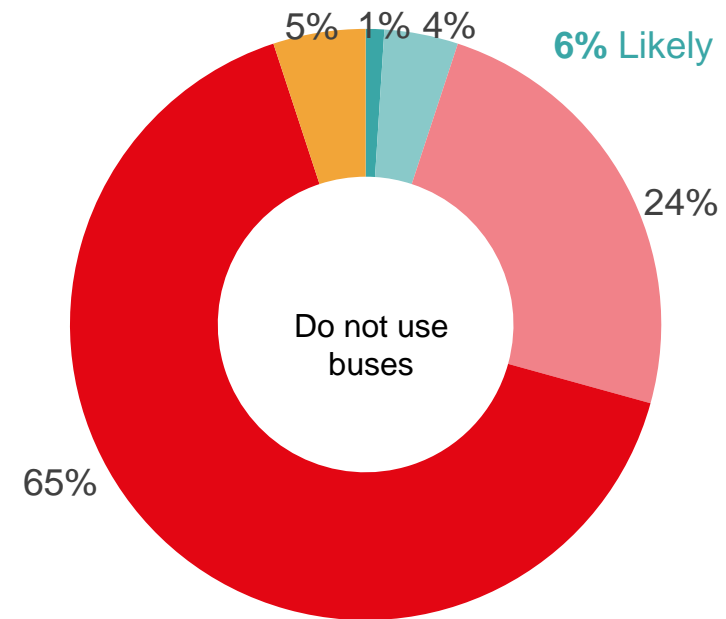
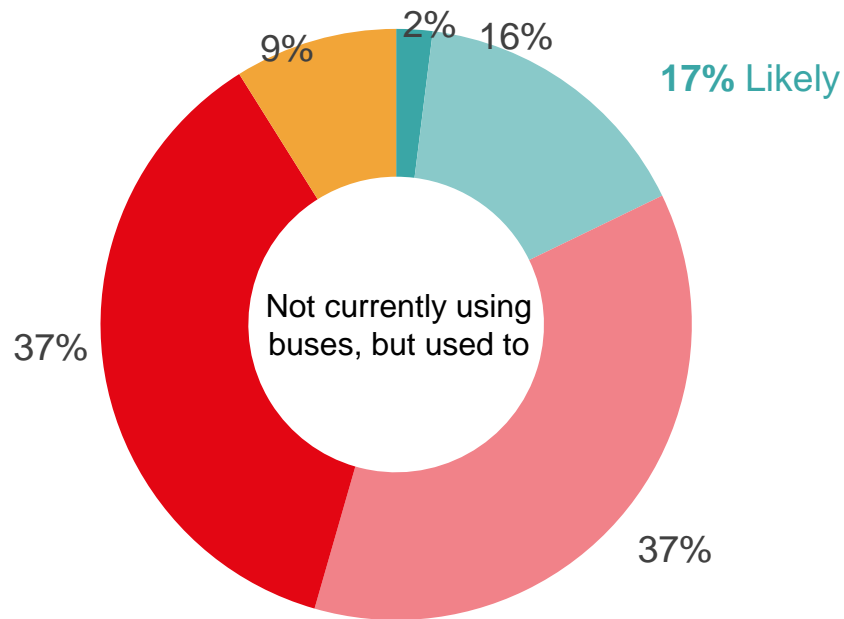
Which of the following reasons best describes why you do not use local buses? (Top 12)



Base: All those who do not use buses (2023=295).

Just under a fifth who used to use the bus say they are likely to do so again

How likely is it that you will use buses in the next year?

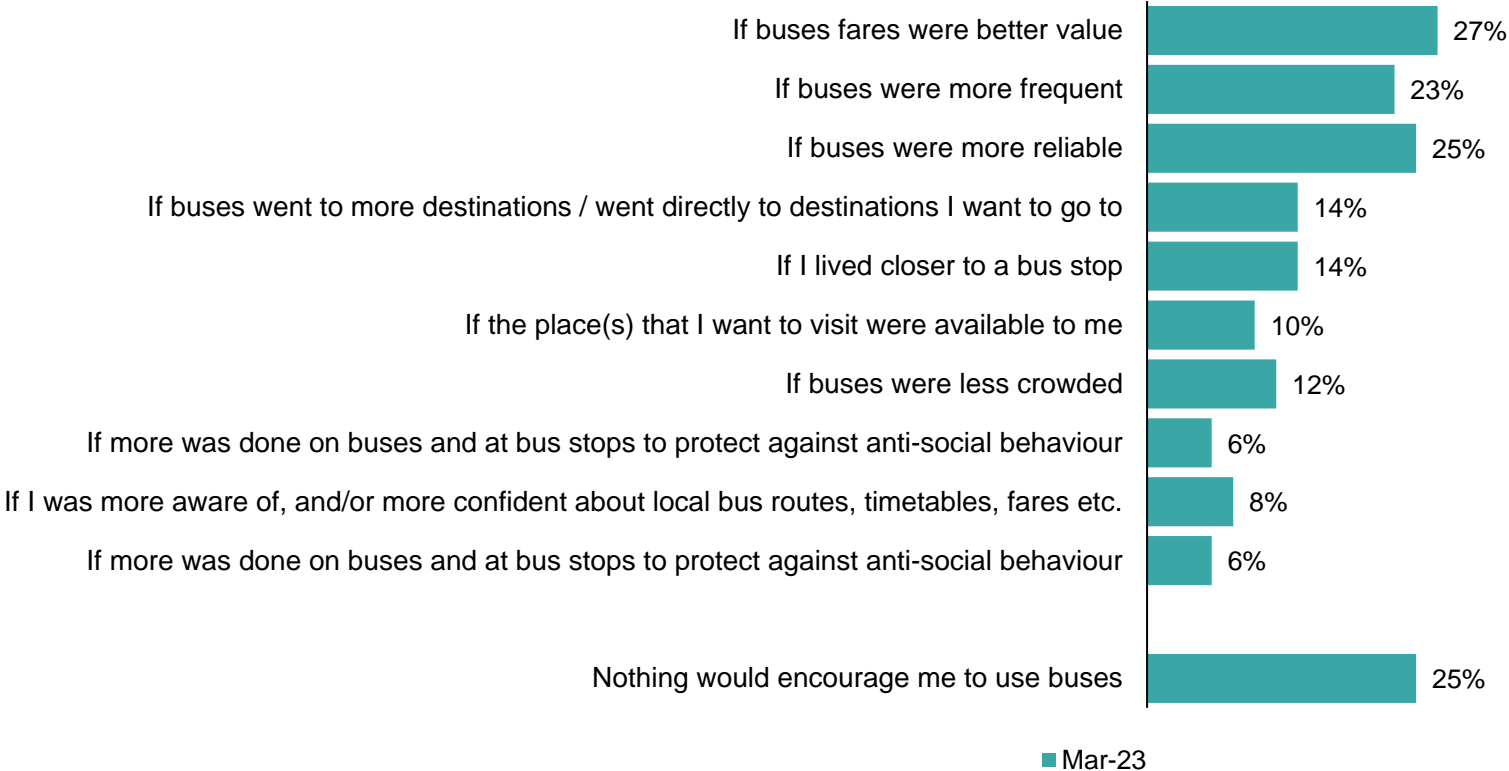


- Very likely
- Fairly likely
- Not very likely
- Not at all likely
- I don't know

Base: Those who are not currently using buses, but used to (216) and those who do not use buses (295).

Better value fares, and more frequent and reliable services would encourage former users to use the bus once again

Which five of the following would encourage you to use your local bus service once again? (Top 12)
All those who do not use buses but used to

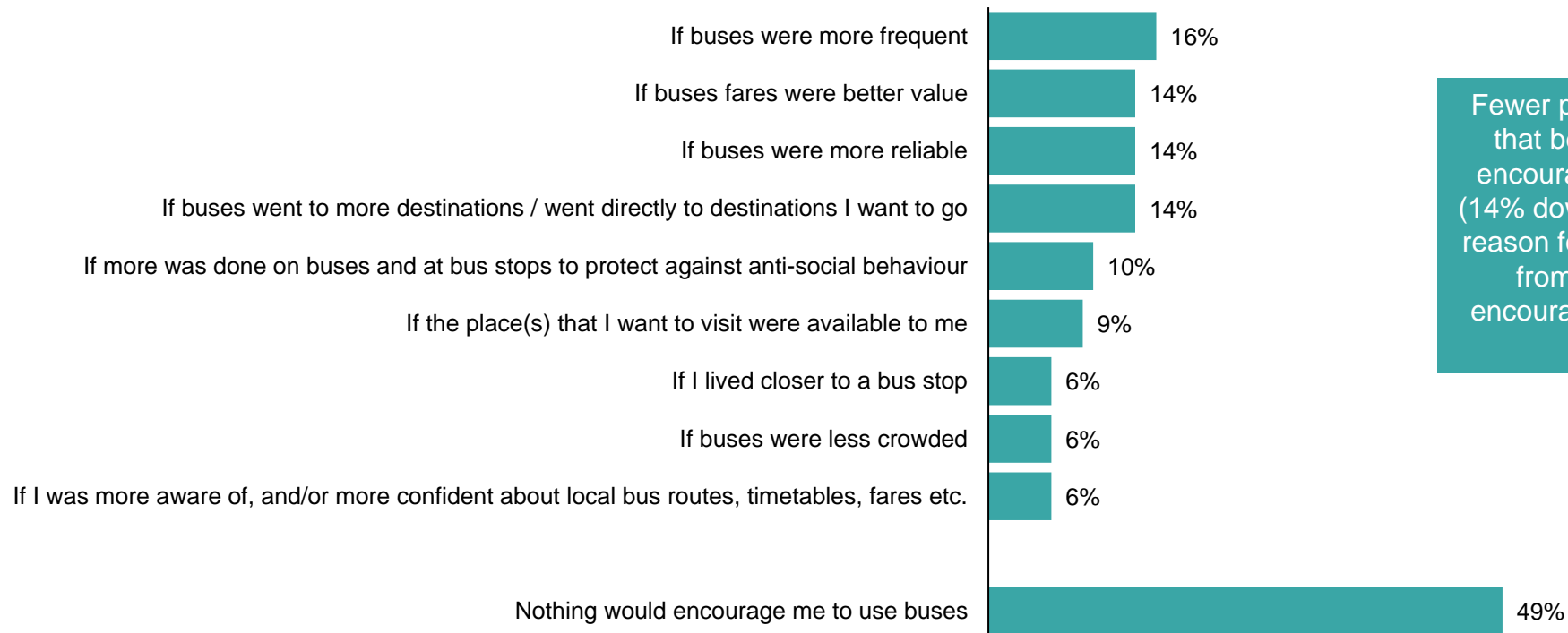


More people than last year say nothing would encourage them to use buses again (from 16% to 25%).

Base: All those who do not use buses but used to (2023=216).

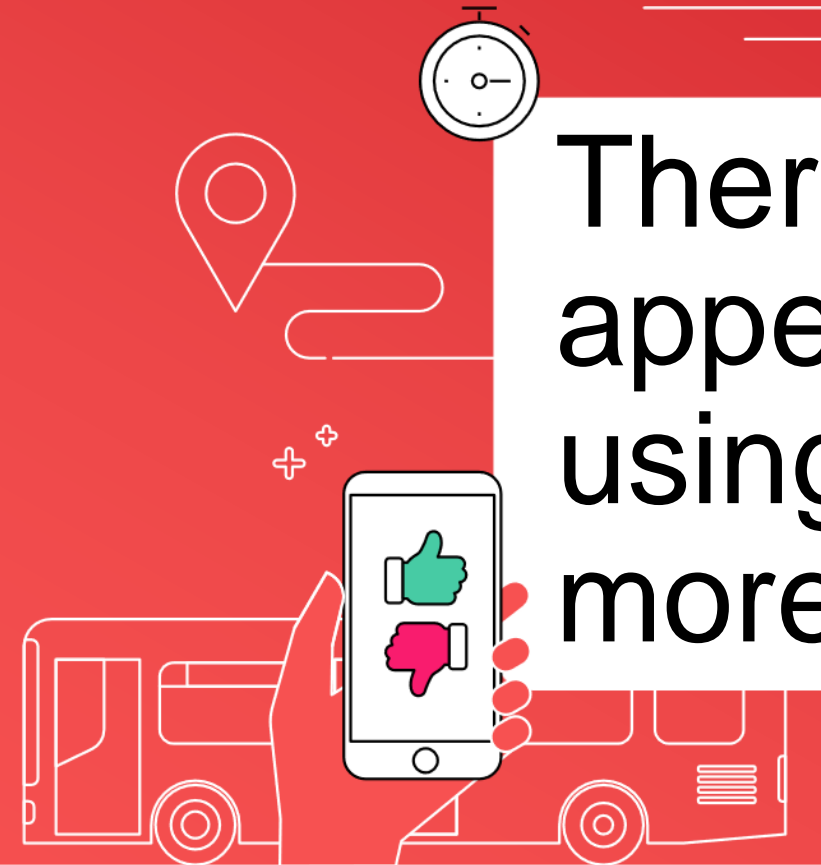
Better value, frequency and reliability may encourage non-users, but half say nothing would encourage them to use buses more

Which five of the following would encourage you to use your local bus service? (Top 10)
All those who do not use buses

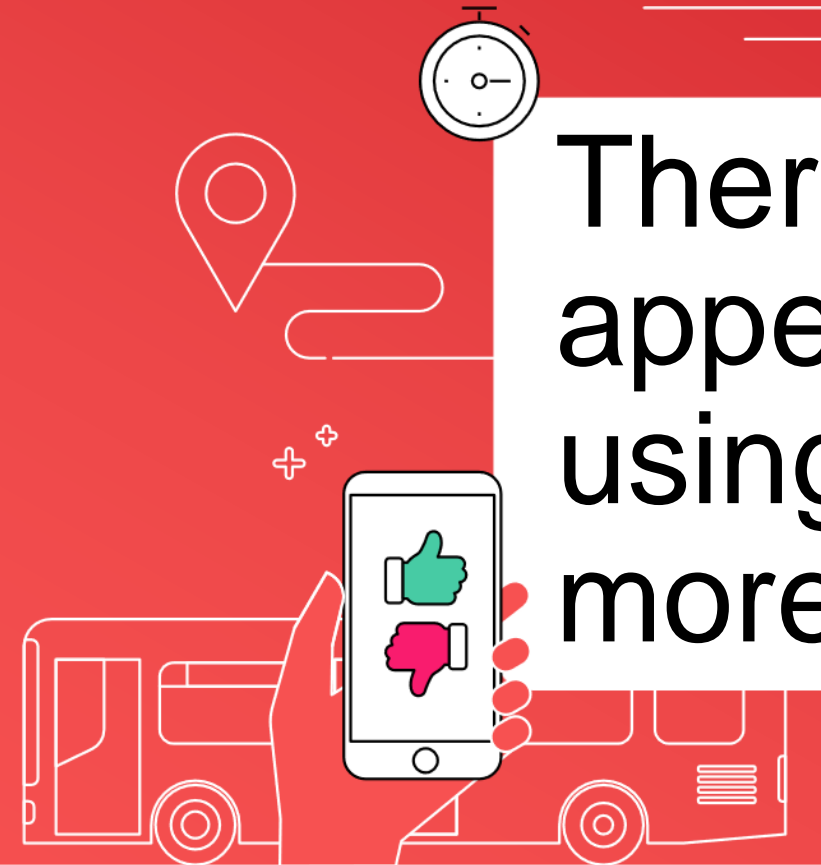


Fewer people than last year say that better value fares would encourage them to use the bus (14% down from 23%). A potential reason for this is these non-users from last year have been encouraged back by the capped fare scheme.

Base: All those who do not use buses (2023=295).

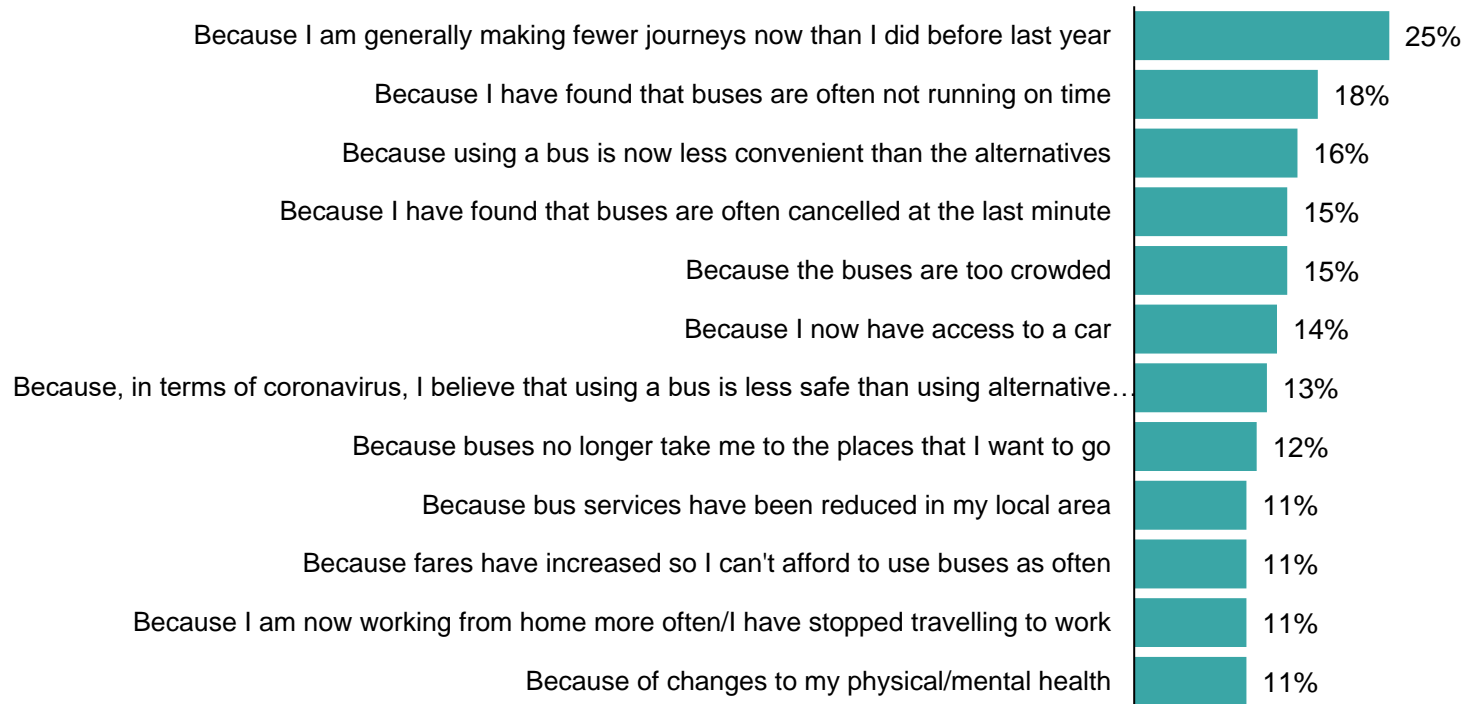


There is some
appetite for
using the bus
more



For those using the bus less often, this is because they are making fewer journeys in general, or have found buses don't provide them with a good enough service

Why are you using buses less often? (Top 12)



Fewer people than last year say they are making fewer journeys (25% down from 39%).

Base: All those who are currently using buses less frequently than they did a year ago (2023=341)

In their own words...

“

Too unreliable. The journey I make means swapping buses and usually one or the other wouldn't turn up.

Female, 33, Eastern

”

“

I think that following the coronavirus epidemic, I have become far more wary of human contact, now face masks are no longer compulsory I am only too aware of the problems associated with getting this awful disease, and despite having all the injections, the disease is still very much out there.

Male, 75, Wales

”

“

I live in a village where the bus service has been reduced considerably. It is not possible to return from the theatre in the nearest city as the buses no longer run at that time of night. Sundays are just a no go.

Female, 80, East Midlands

”

“

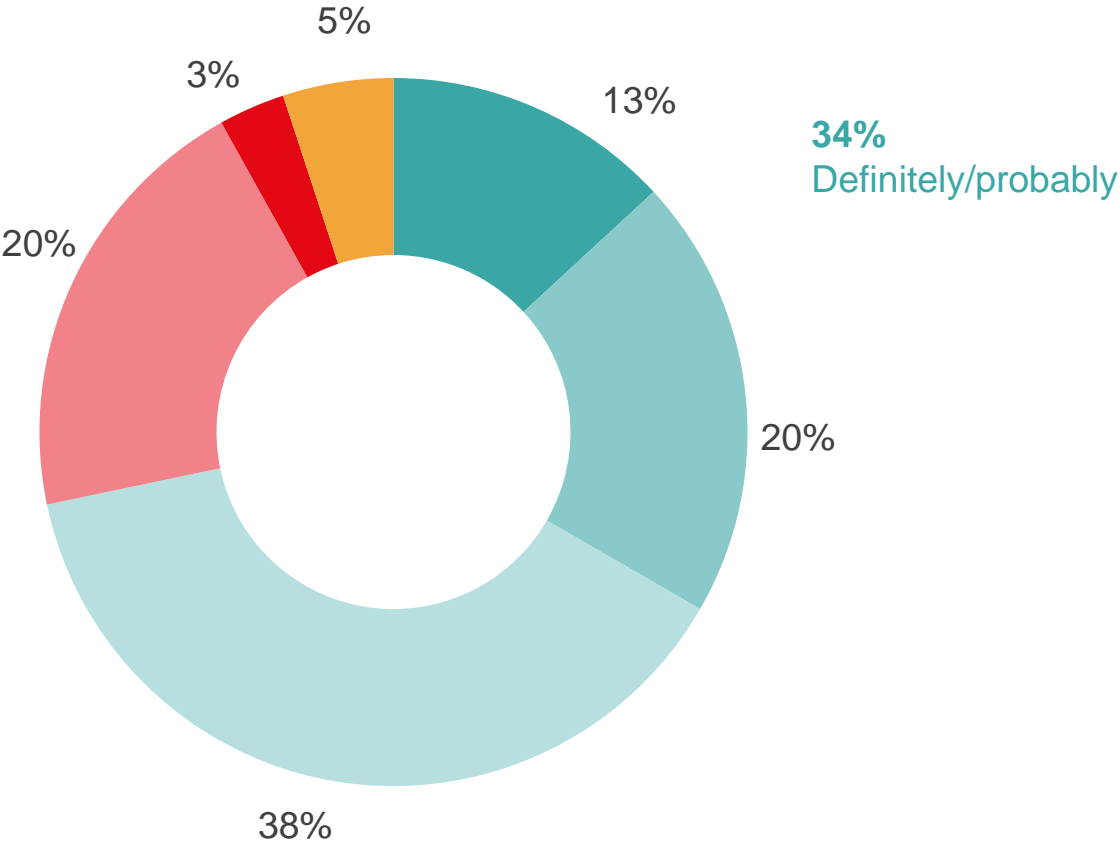
The services have decreased, they are often late, they cost too much, and it is often easier to just walk.

Male, 35, Eastern

”

Around a third of current users would consider using the bus more frequently in future

Would you consider using buses more frequently in future?

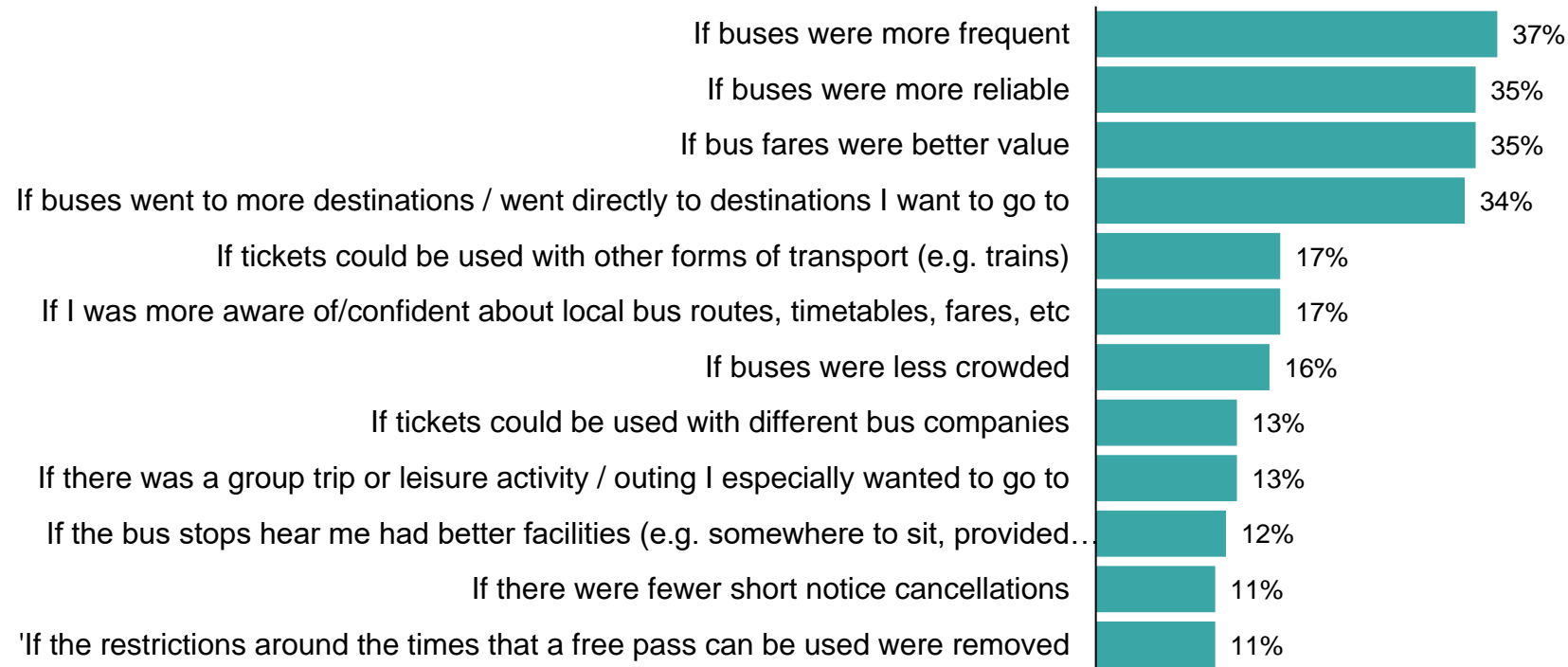


- Definitely
- Probably
- Possibly
- Probably not
- Definitely not
- I don't know

Base: All those who are currently using buses (2023 = 1495)

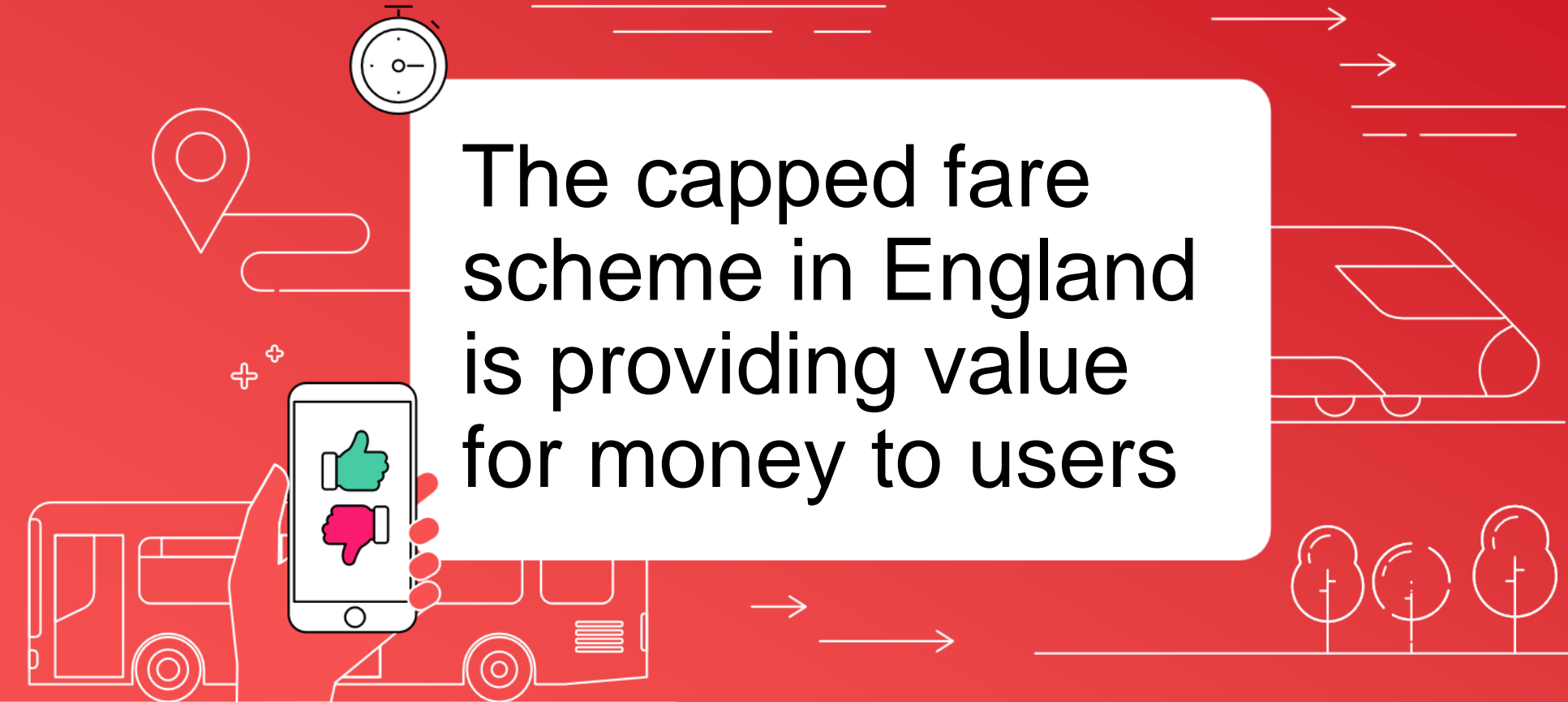
Improved frequency, reliability and value for money would encourage those using the bus less frequently to do so more, along with going to more places

Which five reasons would most encourage you to use buses more in future? (Top 12)



Higher proportion than last year saying better reliability (from 27% in 2022 to 35% in 2023) and more destinations (from 29% in 2022 to 34% in 2023) would encourage them.

Base: All those who are currently using buses less frequently than they did a year ago (2023=341)

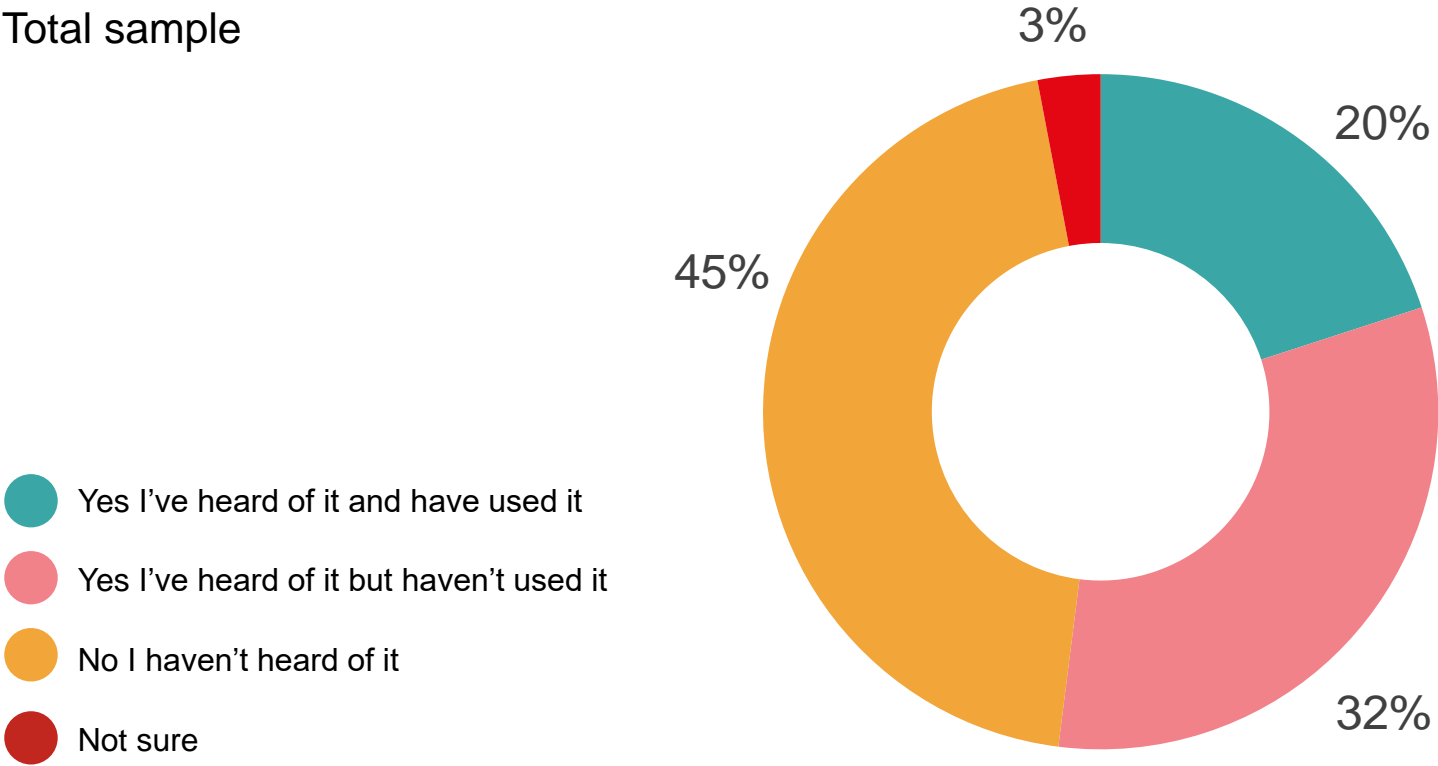


The capped fare scheme in England is providing value for money to users

Half have heard of the £2 capped fare scheme in England and a fifth have used it

Awareness and usage of £2 capped fare scheme

Total sample

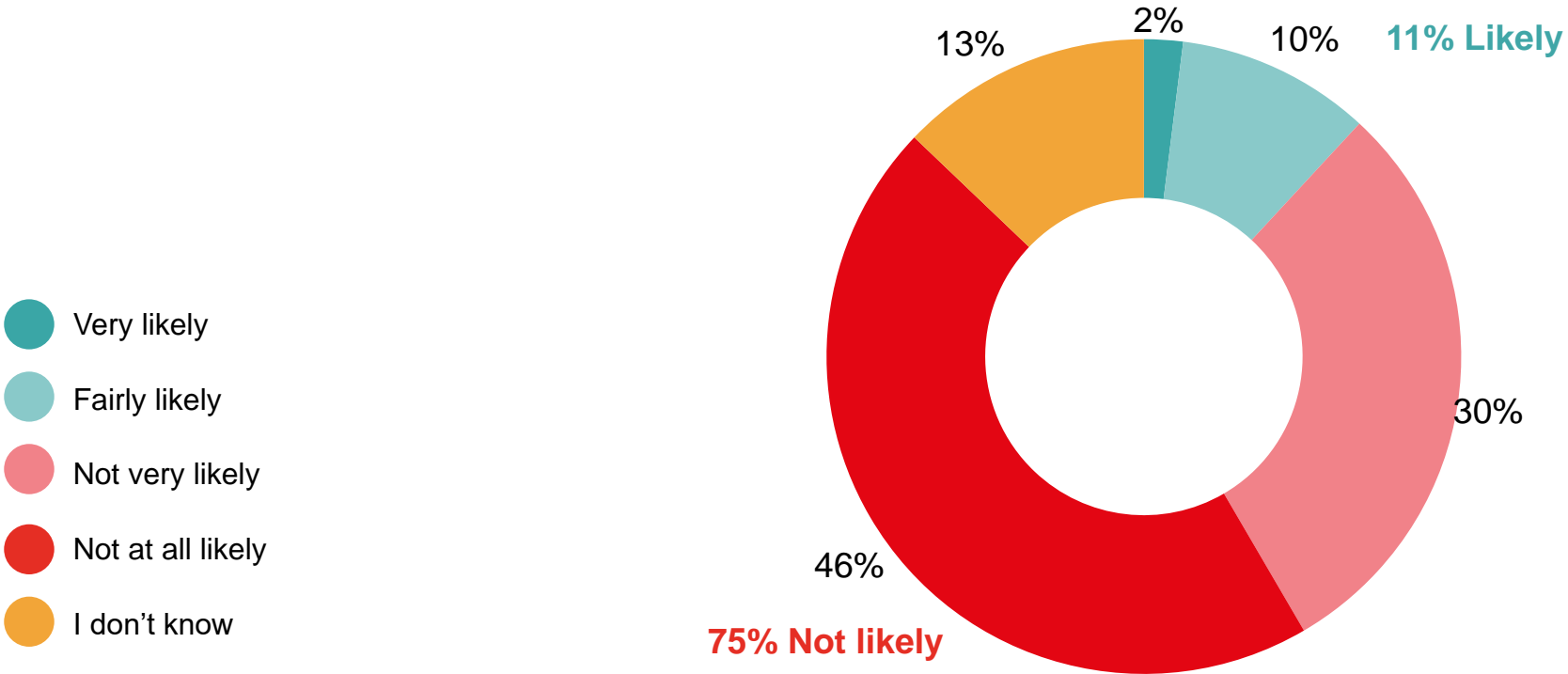


- Yes I've heard of it and have used it
- Yes I've heard of it but haven't used it
- No I haven't heard of it
- Not sure


Base: All who do not hold a free travel pass (1432)

Among those who don't currently use buses, a tenth say the scheme would encourage them to use buses


How likely is it that this scheme (£2 capped fare) would encourage you to use buses more frequently? Those who do not currently use buses



Base: All those who do not currently use buses (494)



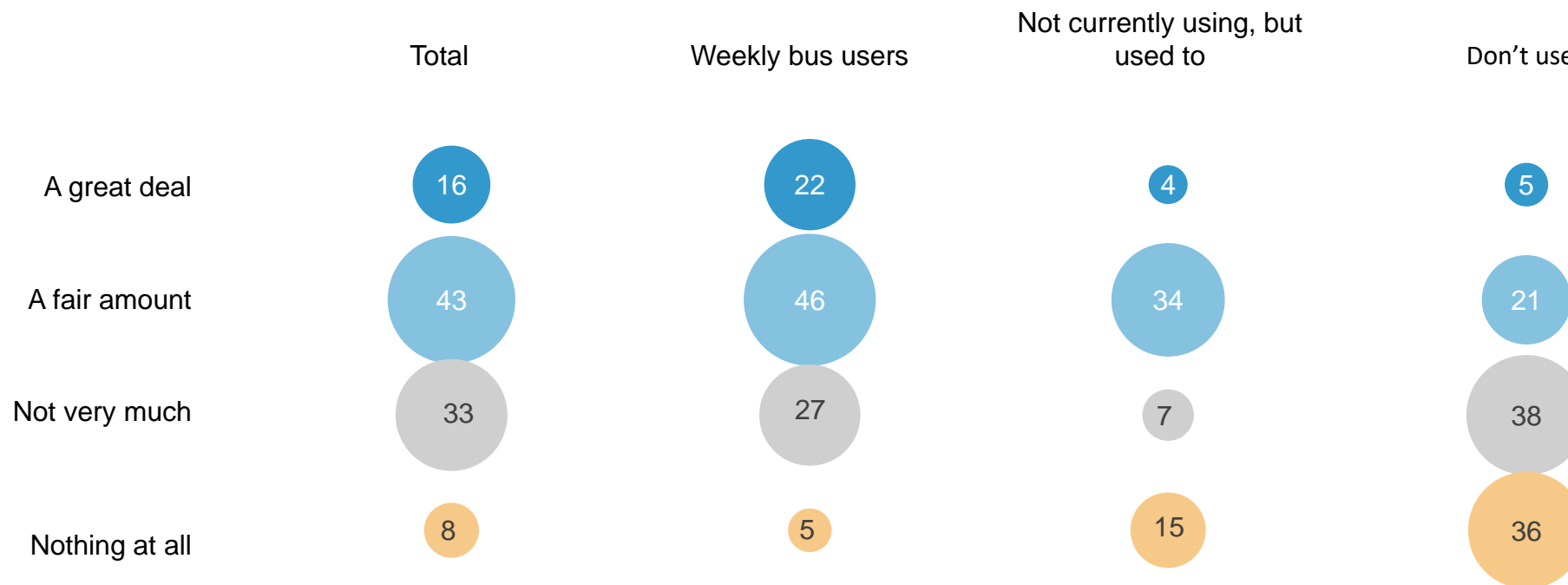
A lack of knowledge about services presents an opportunity for the industry



The illustration features a hand holding a smartphone with a green thumbs-up and a red thumbs-down icon on the screen. To the left of the phone is a location pin icon, and above it is an alarm clock. Below the phone is a bus icon. The background is a solid red color with white line-art icons and arrows scattered around the central text box.

There are gaps in knowledge of local services even for frequent bus users

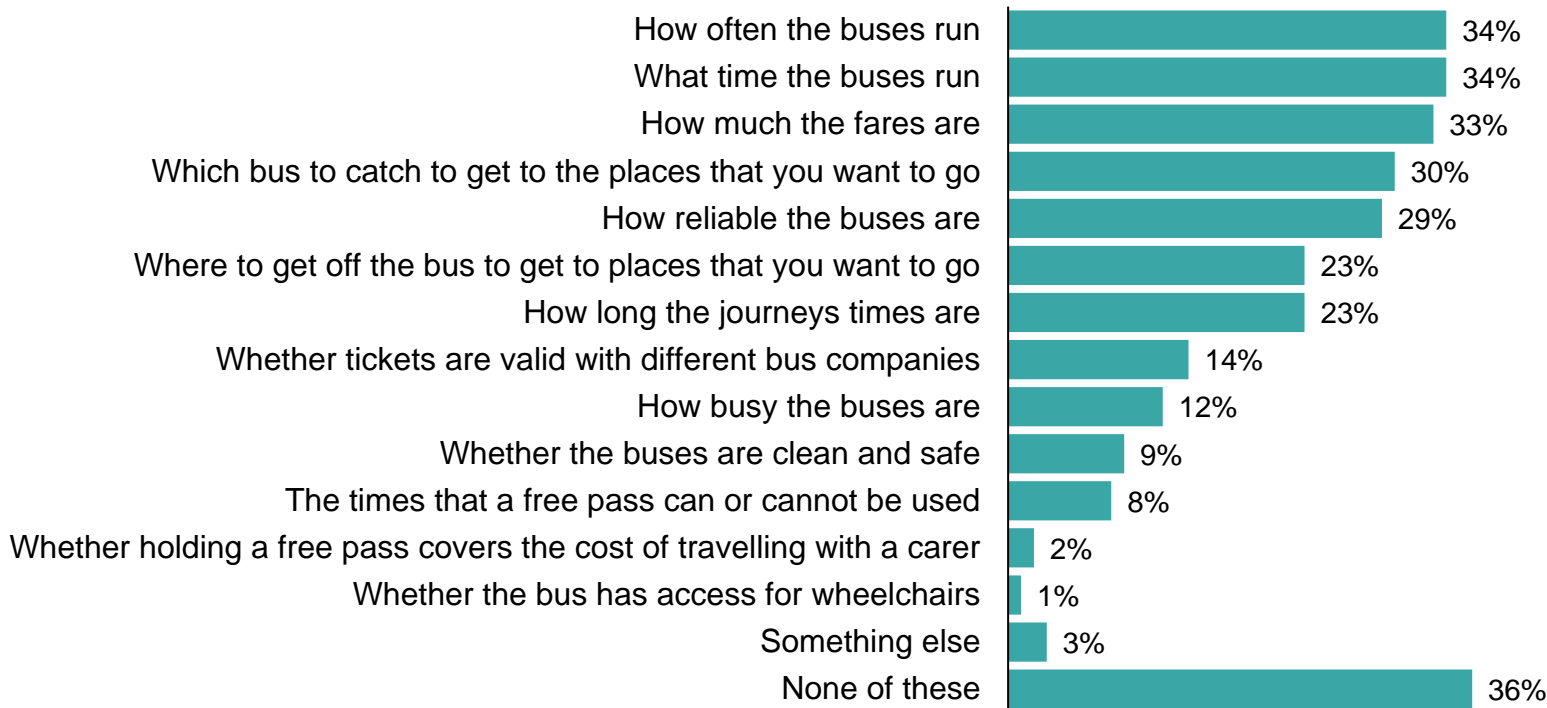
How much overall would you say you know about your local bus service?



Base: All respondents (2006) Weekly bus users (573) Not currently using but used to (216) Don't use (295).

Those who don't know much about their local bus service would like to know more about the times and frequency of services, and how much fares are

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



The appetite to hear more about a number of these has increased since last year:

- Frequency of services (25% to 34%)
- Times buses run (28% to 34%)
- How much fares are (28% to 33%)
- Which bus to catch (22% to 30%)
- Reliability of services (23% to 29%)
- Fewer people saying 'None of these' (45% to 36%)

Base: All who know nothing/not much about their local bus service (829)

Conclusions



While it is not possible to be definitive, it appears that most people are now unlikely to willingly change their travel habits unless their personal circumstances change. Covid is still a factor for some. The state of the economy and the cost of living crisis will continue to impact on bus use. What can the bus industry do to respond?

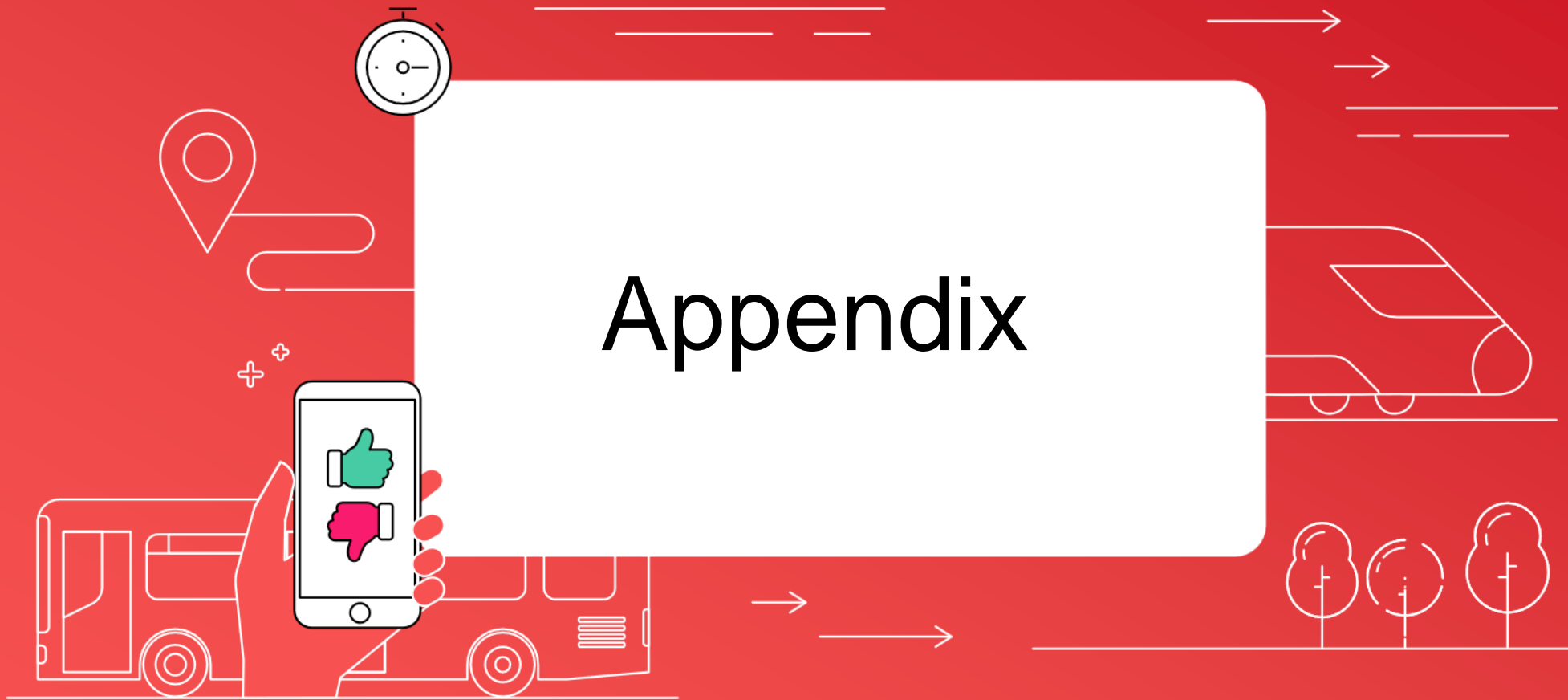


The £2 fare cap introduced by Government and some Mayoral Combined Authority areas has demonstrated that some people will respond to price signals, and the continued commitment to the schemes are welcome.

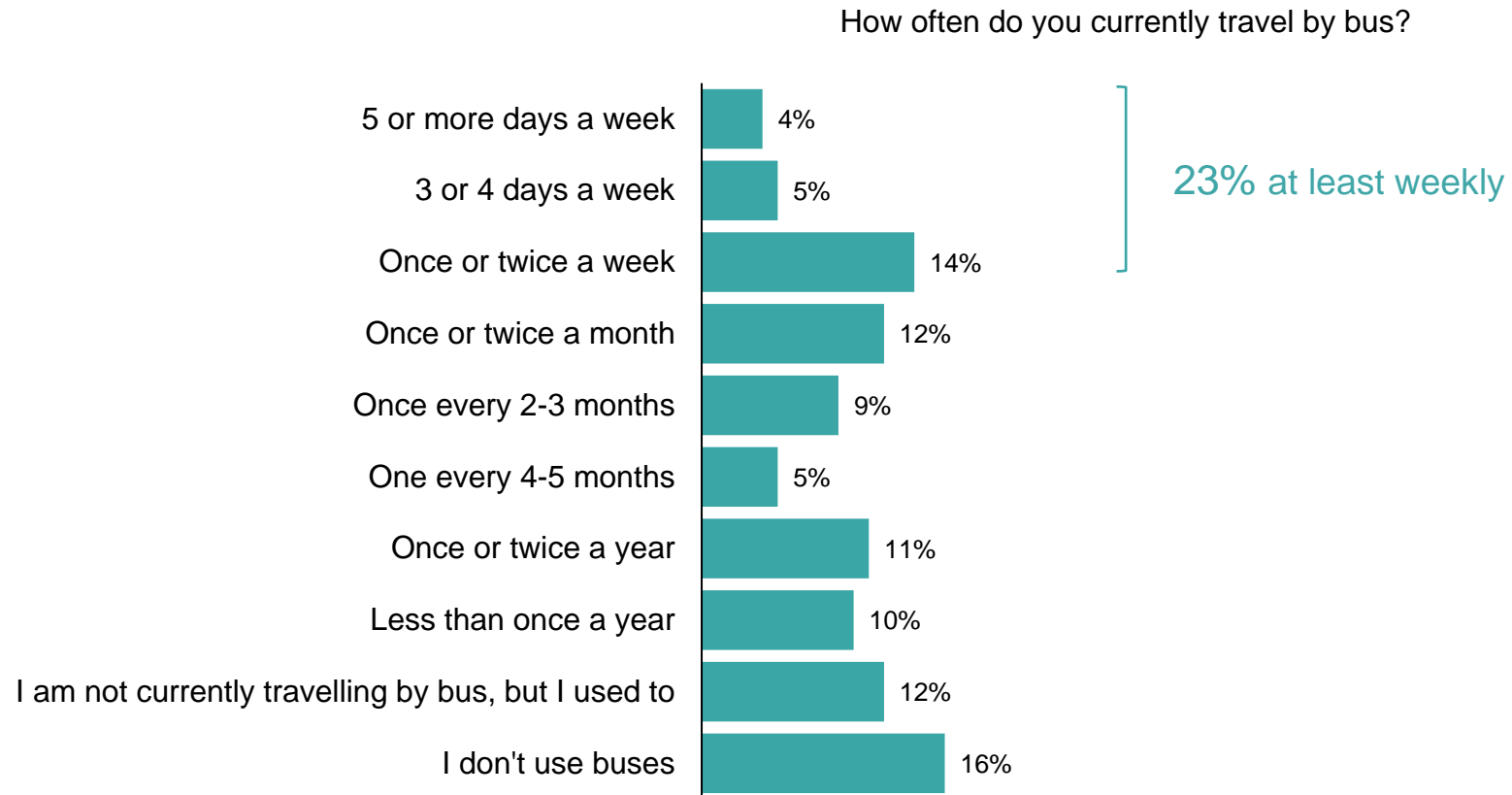


It remains to be seen to what extent the money going into maintaining bus services and supporting Bus Service Improvement Plans will be sufficient to address concerns about matters such as frequency and reliability. This is where the main opportunity lies to build back patronage. Better information may help at the margins.

Appendix



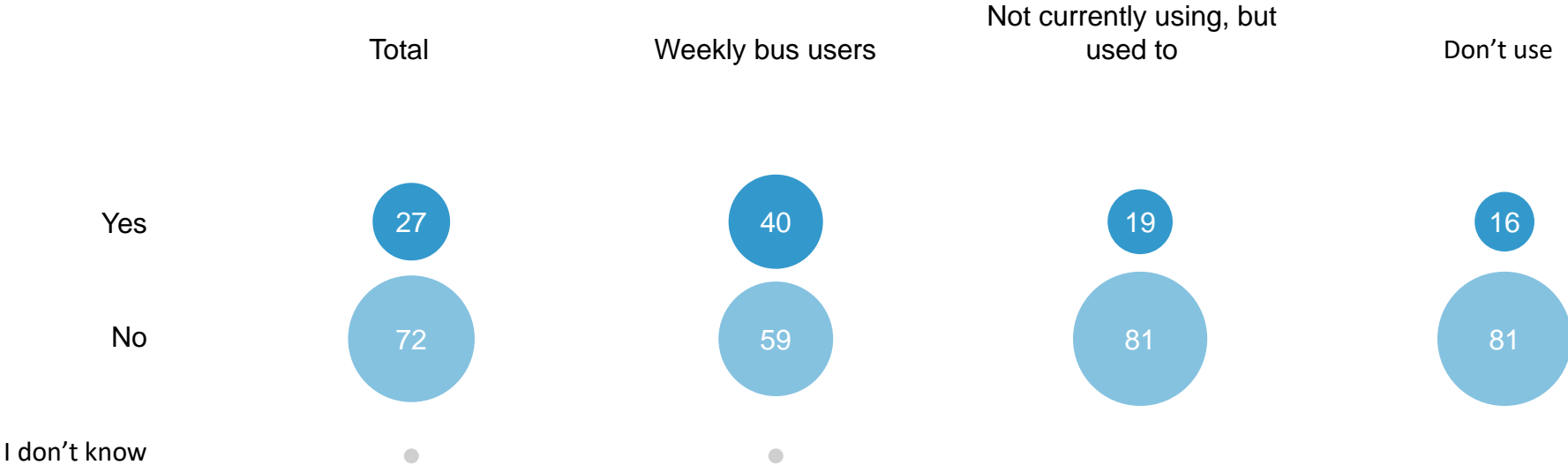
Bus usage in England (excluding London)



Base: England excluding London (1434)

A large number of frequent bus users hold a free travel pass

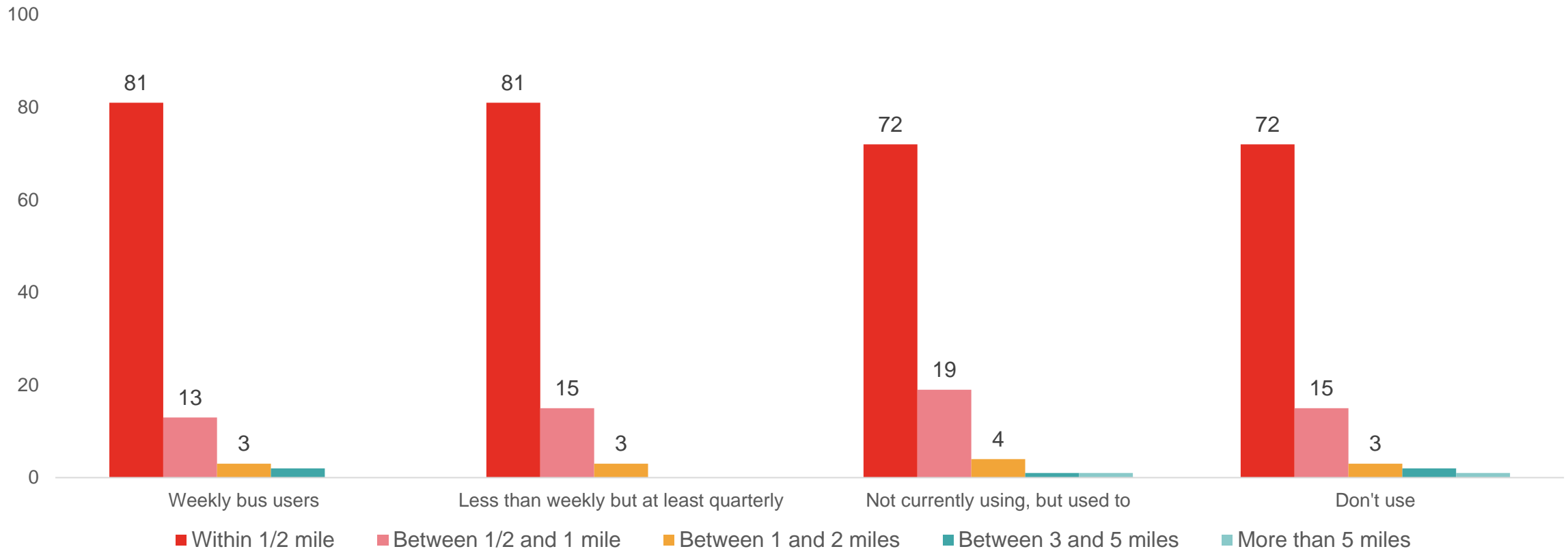
Do you currently have a pass which allows you to travel for free on local bus services?



Base: All respondents (2006) Weekly bus users (573) Not currently using but used to (216) Don't use (295).

Most who use the bus frequently are within half a mile of a bus stop

Approximately how close is your nearest bus stop?

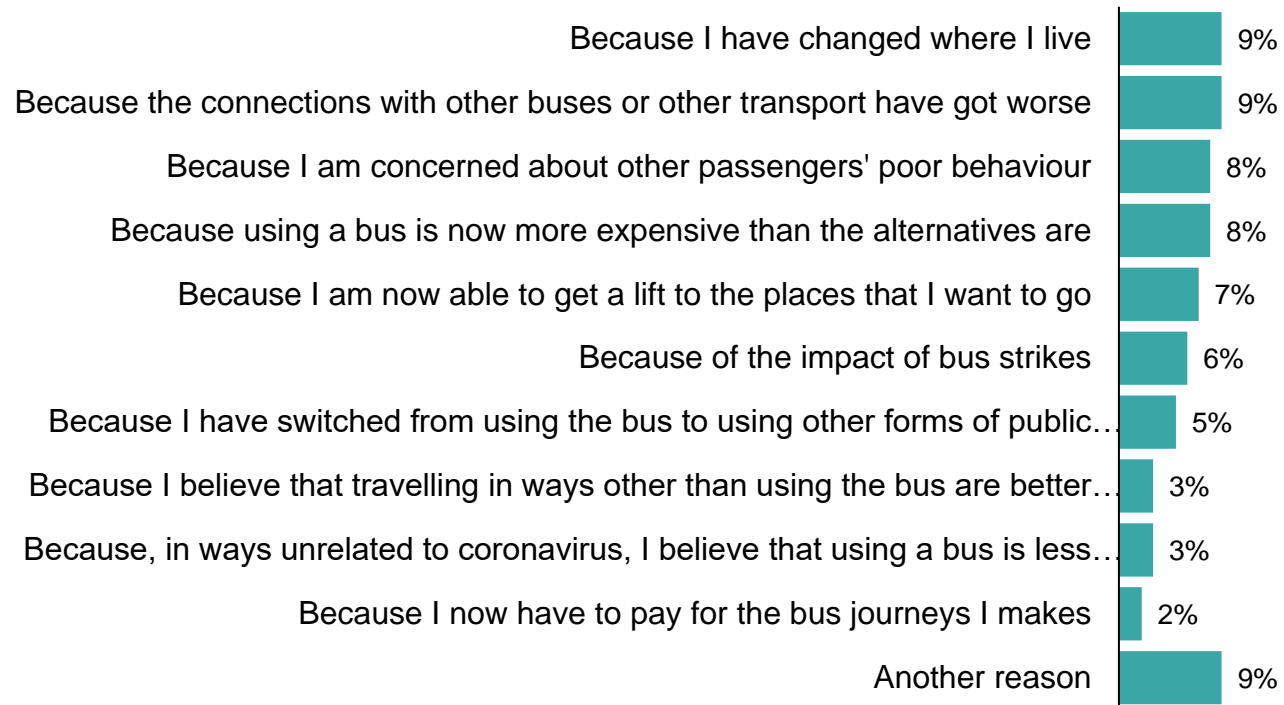


Base (weekly bus users 573) Less than weekly but at least quarterly 440) Not currently using, but used to (216) Don't use (295)

Why are you using buses less often?

Bottom 11 factors

Why are you using buses **less** often? (Bottom 11 of page 12)

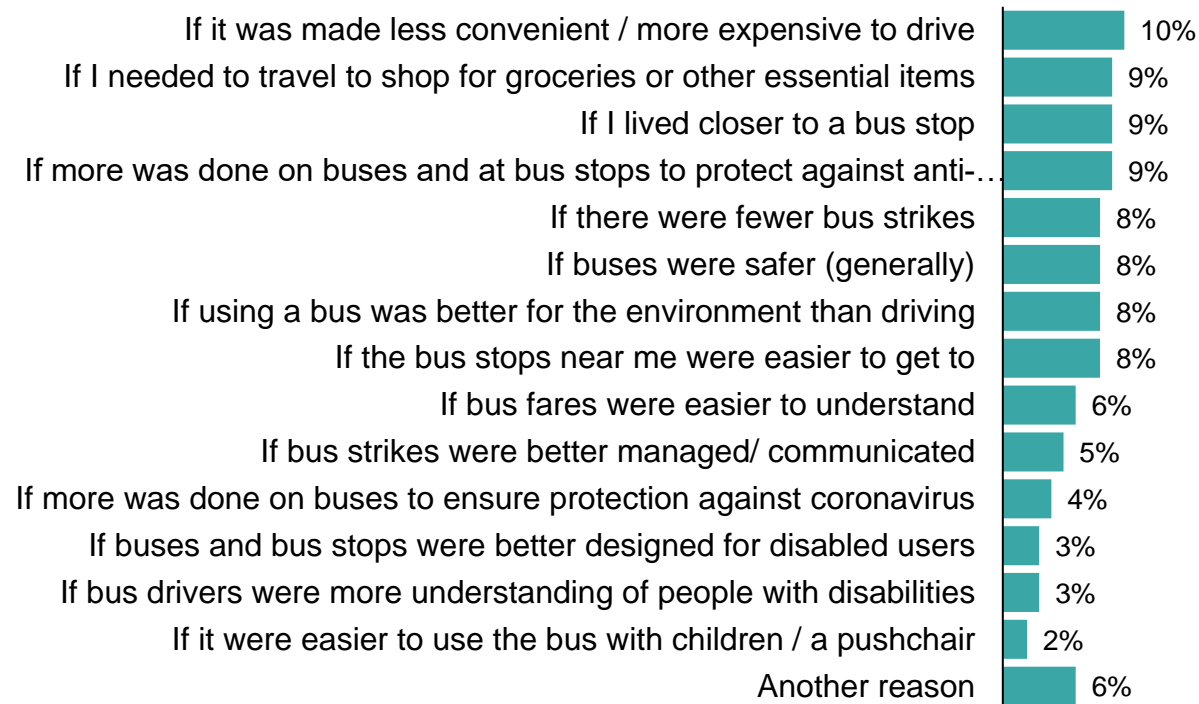


Base: All those who are currently using buses less frequently than they did a year ago (2023=341)

What would encourage you to use buses more in future?

Bottom 15 factors

Which five reasons would most encourage you to use buses more in future? (Bottom 15 of page 16)

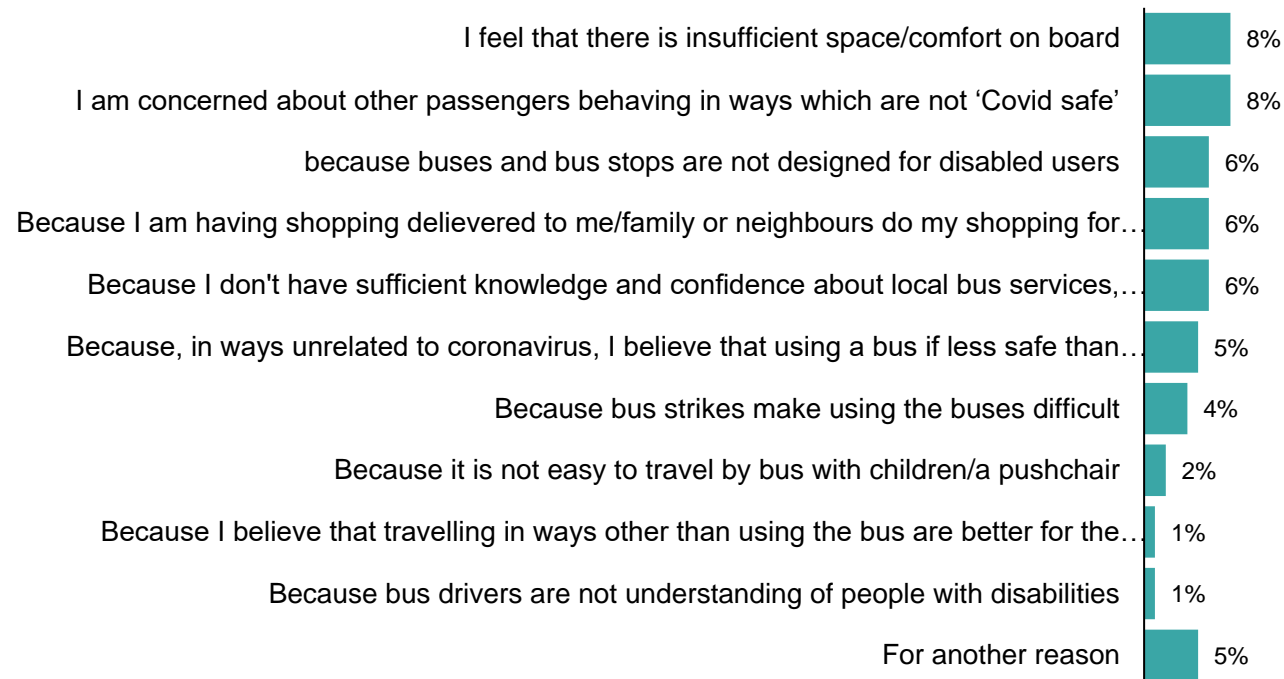


Base: All those who are currently using buses less frequently than they did a year ago (2023=341)

Which of the following reasons best describes why you do not use local buses?

Bottom 11 factors

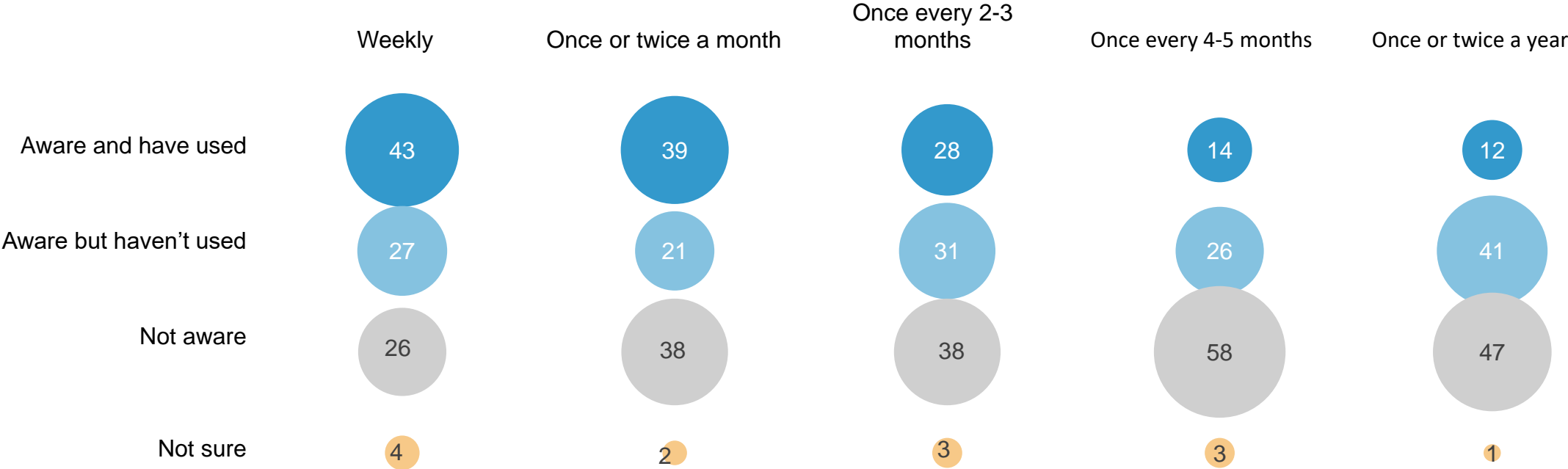
Which of the following reasons best describes why you do not use local buses? (Bottom 11 of page 18)



Base: All those who do not use buses 2023=295).

Two thirds of fare-paying weekly bus users are aware of the capped fare scheme, and two fifths have used it

Awareness and usage of £2 capped fare scheme by frequency of bus usage

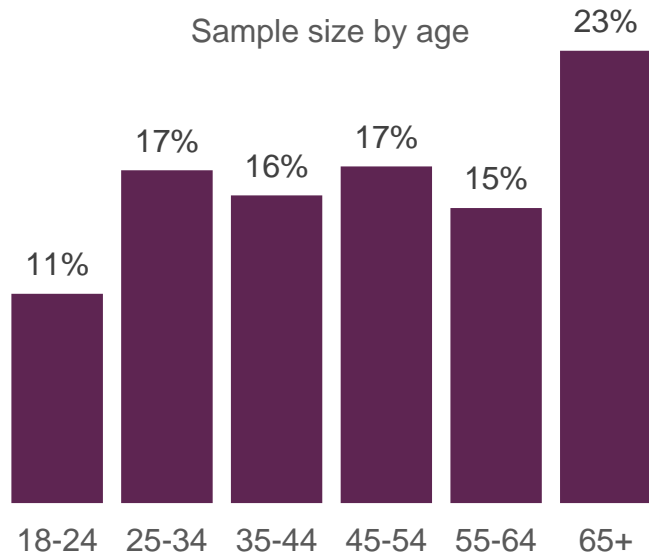


Base: All who do not hold a free travel pass: weekly bus users (329) Once or twice a month (162) Once every 2-3 months (129) Once every 4-5 months (73) Once or twice a year (170)

Survey method and sample breakdown

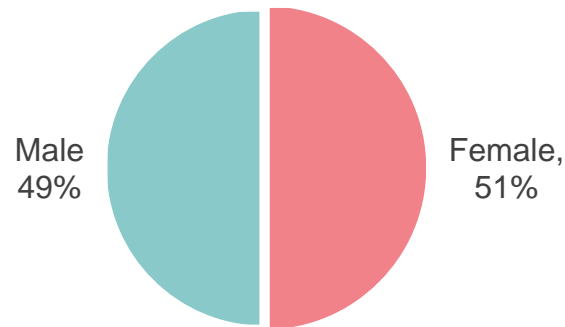
2006 online interviews using Yonder Consulting weekly omnibus.

Total: 2006



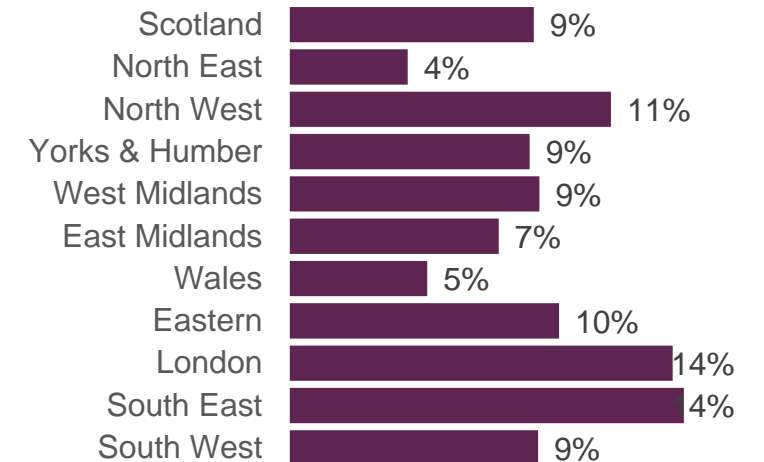
Nationally representative of population of Great Britain* – not all respondents are passengers on public transport.

Sample size by gender



Fieldwork took place between 27 - 28 March 2023.

Sample size by nations and regions %

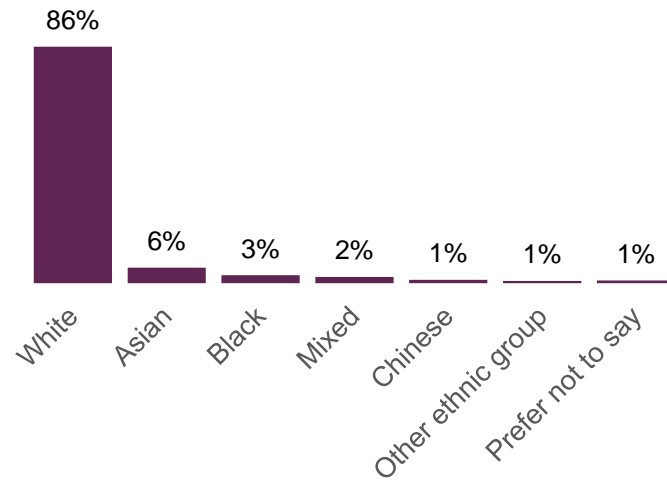


*Nationally representative according to age, gender, region, social grade and ethnicity

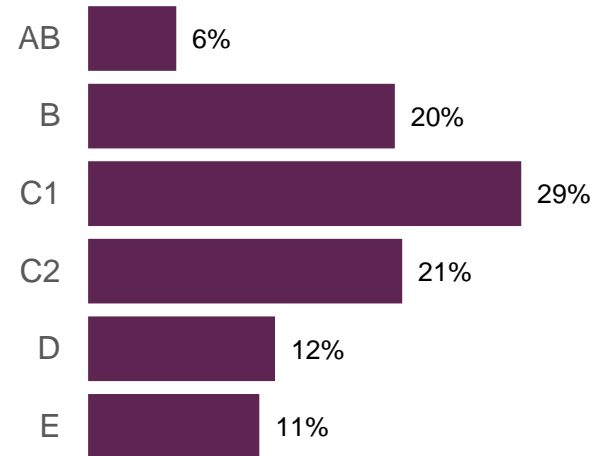
Survey method and sample breakdown

Total: 2006

Sample size by ethnicity %



Sample size by social grade %



Contact

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Transport Focus is the operating name of the
Passengers' Council