

## **Written evidence submitted by Transport Focus (BUS0029)**

### **Introduction**

Transport Focus is the independent consumer watchdog representing the interests of rail users throughout Great Britain; bus, coach and tram users across England, outside London; and users of the Strategic Road Network in England. We are an evidence-based organisation: our representations of the passenger interest are based on our research into the experience of passengers and the views of non-users.

Transport Focus welcomes the Transport Select Committee's inquiry into the implementation of the Government's national bus strategy, *Bus Back Better*, and the challenges faced by the bus sector as it recovers from the pandemic.

After several largely unsuccessful attempts over the last 20 years to encourage local transport authorities (LTAs) to develop partnerships with their local bus operators, the national bus strategy finally directed most LTAs to use the Bus Services Act 2017 powers to establish Enhanced Partnerships (EPs) by telling them that only authorities with an EP or which had begun the process of franchising their buses would have access to government support for improving their bus services.

To bid for funds they had to submit a Bus Service Improvement Plan (BSIP) by October 2021. EP Plans and Schemes would need to be made by April 2022. Before making their EP, they would need to give local bus operators 28 days to object to it and then carry out a statutory consultation. The expectation was that the Government, having reviewed their BSIP, would indicate to each local transport authority what level of funding they would provide and that this would inform the content of the draft Schemes.

We start by offering our views on the national bus strategy, before describing our work to support the development of BSIPs and EPs. We then comment on the draft EPs on which we have been consulted before summarising the findings and conclusions of our passenger research into their perceptions and expectations of travelling during and after the Covid-19 pandemic and offering some concluding comments.

### **Transport Focus views on the national bus strategy**

Transport Focus is delighted that the Government has chosen to focus its national bus strategy on passengers' priorities for improvement, citing the findings of our research. We also welcome the references in the strategy to the results of our annual Bus Passenger Survey. We acknowledge the ambition of the strategy. We are also pleased that it is requiring LTAs to set targets for improving the performance of their local bus services against some of passengers' top priorities - punctuality, journey time and passenger satisfaction – as well as for patronage. The strategy establishes processes which provide passengers and their representatives with opportunities to influence their attempts to improve local bus services, and we welcome this.

### **Transport Focus work to support BSIPs and Enhanced Partnerships**

From the moment the strategy was published, we recognised that LTAs could benefit from our help and advice in several key areas as they developed their BSIPs and prepared to consult on their EPs. So we published guidance on the following three areas and ran webinars to further explain and discuss our suggestions:

#### *Passenger representation on Bus Service Improvement Plans (May 2021)*

This explains how to:

- decide who LTAs need to hear from
- make full use of the information LTAs already have available
- consider commissioning passenger research, such as focus groups, to quickly plug the gaps in LTA data
- engage directly with passengers, community groups and local elected representatives
- think carefully about who is best placed to represent the passenger interest clearly and powerfully on boards or committees.

#### *Setting targets in Bus Service Improvement Plans (June 2021)*

This focuses on things to consider when setting targets for journey times, reliability improvements, customer satisfaction and patronage. It also looks at monitoring and reporting on performance against them.

#### *Passenger Charters for Bus Service Improvement Plans (August 2021)*

Our third guidance document explains the purpose of a passenger charter, what should be included, how to promote it and how to use it to improve local bus services. It recommends:

- the main body of the charter should explain what every passenger can expect every time they travel and focus on the things that matter most to them
- avoiding qualifying standards with phrases such as ‘wherever possible’
- encouraging passengers to complain if their expectations are not met.

We followed up by publishing *What passengers want from BSIPs* (September 2021), supported by a further webinar. This document pulls together some of the main conclusions from our national bus passenger research over the last ten years on what passengers would like to see improved.

Finally, we published *Consulting on Enhanced Partnerships* (December 2021), our guidance on the EP statutory consultation, and presented a webinar at which a representative of the Department for Transport answered questions.

Transport Focus is a statutory consultee on EPs. We take this responsibility seriously. Up to 31 March we have responded to 43 of 4440 consultations received.

While a small number of authorities have begun the process of franchising their bus services, to date only Greater Manchester has made a franchising scheme under the Transport Act 2000, and even there the first bus services will only be franchised in 2023. Therefore, our evidence focuses largely on EPs.

### **Enhanced Partnerships: overall comments**

As already noted, the National Bus Strategy required EP Plans and Schemes to be made by April 2022. At the time of this submission, the Government had not yet announced indicative funding. We accept that the continuing need to protect the bus industry from the effects of the pandemic will have added to the challenges facing the Government in sticking to its original timetable. However, with LTAs required to give local bus operators 28 days to object to their proposed EP, many have had to carry out a statutory consultation ‘blind’ in pursuance of this timetable. This has resulted in Schemes which generally fail to match the ambitions of the EP Plans. All of the Schemes we have seen include bespoke variation mechanisms which spell out how they will be revised once funding is clear.

A letter from the Department for Transport to LTAs in early February indicated that this timetable had slipped and that there was no longer a requirement to make their EP Plan and Scheme by April 2022. A significant number of LTAs who had not yet embarked on consultation appear therefore to have stalled their consultation plans while they wait for more information on Government funding. This may ultimately result in clearer draft Schemes in those areas, with Enhanced Partnerships able to reflect funding commitments.

EP Plans are largely based on the LTA's corresponding BSIP. They are generally longer-term than the Schemes which accompany them. They contain targets, as required by the national bus strategy, for 2024/25 and in some cases 2029/30. These targets range from the relatively cautious to distinctly ambitious. Not all of them are benchmarked against reliable measures of current performance, although most appear to be. It is not always clear how they will be achieved – many EPs would be improved by making a clearer connection between proposed measures/facilities and targets. It is too early to present a verdict on progress towards achieving them, partly because of the lack of clarity over Government funding and partly because the EPs have not yet been made and the measures and facilities have yet to be introduced – the initial targets are three years away and even the first of the six-monthly progress reports lie in the future.

What we can say is that the BSIP process has represented a great stride forward in many areas in gathering and reviewing hard data and passenger opinion in relation to current local bus services and how they can be improved, including benchmarking comparisons with other, similar areas. Many LTAs have consulted and engaged with users and non-users to inform their BSIP, and this is welcome – the right agendas are much more likely to result from this process.

Many authorities intend to use our research to measure the satisfaction of passengers with their local bus services. Some authorities are planning to measure the performance of bus services in achieving customer satisfaction using the National Highways and Transport Network (NHT) survey. However, since a high proportion of participants are non-users, measures are unlikely to have a significant impact on satisfaction levels unless non-users perceive improvements to have been made to services. Communication will be key.

### **Enhanced Partnerships: specific comments**

Our document *What passengers want from BSIPs* identified measures and facilities which would underpin passenger priorities for improving bus services. Transport Focus is looking for progress in the following areas in particular:

- Buses running more often
- Buses going to more places
- More buses on time/faster journey times
- Better value for money
- More effort to tackle anti-social behaviour
- Better quality of information at bus stops
- Accessible buses
- Cleaner buses

We have only received about half of the draft EPs and have not yet had an opportunity to assemble a full national picture of their strengths and weaknesses. We intend to carry out a full review highlighting best practice once all the EPs have been made. However, for now, we can offer a few high-level interim observations:

**Buses running more often:** some EP Plans have set out relatively detailed ambitions to improve the frequency of certain types of service and/or in evenings and weekends, while others are simply hoping to carry out reviews.

**Buses going to more places:** some EPs have identified specific gaps in their network that they would seek to plug. There are some proposals for demand responsive transport. Quite a large number of EPs make a commitment to reducing the number of timetable changes each year in the interests of network stability.

**More buses on time/faster journey times:** quite a few EPs contain relatively specific and detailed bus priority measures for which they are seeking funding; others have not got beyond the review/feasibility study stage. It remains to be seen to what extent these measures can help to achieve improvement targets, as they are swimming against a tide of rising congestion in most areas of the country.

**Better value for money:** a commitment to some form of multi-operator ticketing and some attempt to simplify fares is quite common; commitment to

lower fares is less common, although some EPs indicate a desire to extend existing discounts to groups, such as young people.

**More effort to tackle anti-social behaviour:** while we cannot be certain that anti-social behaviour is a problem across the country, proposals to improve passenger safety appear to be more common on buses (via CCTV) than they are at bus stops.

**Better quality of information at bus stops:** some EPs make commitments to extend real time information displays; few make meaningful commitments to extend printed at-stop timetables and commitments to include network maps and fares information at major stops are similarly lacking.

**Accessible buses:** there are some notable examples of commitments to rolling out next stop audio-announcements, guarantees to wheelchair users, and driver customer care training, but these are far from universal.

**Cleaner buses:** despite the pandemic, commitments to cleaner vehicles are patchy.

Such a high proportion of these measures are subject to funding that the current draft EPs may present an over-optimistic picture of what is likely to happen.

The governance of EPs also matters. Our particular focus is on transparency, consultation and representation.

Arrangements for passenger representation are variable. Transport Focus has been invited to join Boards (sometimes as an independent Chair, as in Norfolk) and Stakeholder Forums. Sometimes passengers with protected characteristics and local businesses are represented. In other cases, passenger representation is ill-defined or subject to funding.

All LTAs are required by s.138 (A) of the Transport Act 2000 to have a Plan for consulting users on how well their EP is working. Cornwall's EP offers a thoughtful solution. However, it appears that some LTAs may not have complied with this requirement in their draft EPs; others have only the most high-level plans.

All the EPs we have seen propose to adopt a bespoke mechanism should they need to vary their Scheme. While this is indeed less onerous than the full consultation which would otherwise be required by s.138K of the Transport Act 2000, we are concerned that it may be used as an alternative to making additional Schemes, which would require consultation with Transport Focus and other statutory consultees. We feel that this mechanism should only be used for relatively minor modifications to what is already included in the Scheme, and that after April 2022, new Schemes should be added and consulted upon. We are seeking reassurance on this point. Some authorities have modified their Schemes in response to our concerns.

We have been invited to comment on a handful of draft Bus Passenger Charters. We are pleased to see that our message appears to be getting through: that charters should be short and punchy and should focus on setting out what passengers should expect every time they use the bus and inviting complaints and comments when these expectations are not met.

We believe that the process of writing a charter is a key part of the agenda-setting exercise for improving local bus services: it is both central to accountability and an important marketing tool. Charters must be well-publicised at stops and on buses so that passengers are aware of them; burying them on websites is not acceptable. Operators and authorities should be working behind the scenes to improve the service and, only when they have done so, should the new stronger commitments be mentioned. The focus of these public-facing documents should be on the passenger experience not on the operator activity and management systems which sits behind them. Not all these messages appear to have been fully understood.

### **Recovering from the pandemic**

At the Government's request, in April 2020 we published guidance for the bus industry on communicating changes to local bus services which the Government asked those in receipt of the Covid-19 Bus Services Support Grant to follow.

Transport Focus has published regular research among users and non-users throughout the pandemic.

We published some in-depth qualitative and quantitative research in *The route ahead: getting passengers back on buses* (April 2021 and June 2021

respectively). A summary of the findings and conclusions is attached as Appendix 1.

From the first weekend in May 2020 until the first weekend of March 2022, Transport Focus undertook a weekly Omnibus survey, *Travel during Covid-19*, which explored people's recent travel behaviour. We carried out 2000 interviews each weekend, asking:

- How safe they feel, or would feel, when using buses
- Whether they have worn a face covering
- Whether they feel safer using the bus with people wearing face coverings
- Whether coronavirus is a major concern
- Whether enough is being done to ensure coronavirus safety on public transport
- Whether they will ever again feel completely comfortable on public transport
- Whether they are avoiding unnecessary activities due to the coronavirus.

The percentage of passengers who felt safe when using buses, in relation to Covid 19 was 90 per cent. The percentage of non-users who would feel safe if they had to make a bus journey was 63 per cent. 64 per cent claimed to have worn a face covering on their most recent bus journey all or some of the time, which represents a sharp decline over the previous two months. 67 per cent felt safer when using public transport with people wearing face coverings. Coronavirus was still a major concern for 43 per cent. While 47 per cent agreed that enough was being done to ensure coronavirus safety on public transport, 27 per cent disagree (a drop from 38 per cent just before Christmas). Over a third, 37 percent, said they would never again feel completely comfortable on public transport

The figures speak for themselves. While many of the statistics appear to be moving slowly in the right direction, there is little evidence to suggest this trend is as a result of measures to make buses safer (it is more likely to reflect changes in the progress of the pandemic and people's wider attitudes to the spread of the disease and its likely impact on them). A substantial number continue to not feel completely safe on buses.

While the *Travel during COVID-19* survey wound up in early March 2022, we will continue to monitor perceptions of safety on four key factors with this



data published monthly from April 2022. This will be part of our *Bus User Weekly Survey*.

This survey obtains the views of approximately 500 bus passengers (outside London) each week with passengers rating how satisfied they were with their overall journey and a range of aspects including the punctuality of their service, the value for money of their ticket and a number of Covid-related measures.

A link to our latest report (published 1 April 2022) can be found here:

<https://www.transportfocus.org.uk/publication/bus-user-weekly-survey-trend-analysis/>

It shows results over the twenty weeks the survey has run so far, covering fieldwork taking place between 26 and 29 September to this most recent week between 23 and 27 March 2022.

## **Conclusion**

According to some reports average weekly bus patronage in England outside London has fallen to around 70 to 80 percent of pre-pandemic levels, albeit that the current figure represents a recovery of sorts from lows experienced during earlier lockdowns. We fully recognise the challenges facing the bus industry as it recovers from the pandemic.

The wider context is of a decade of decline in bus patronage up to the start of the Covid-19 pandemic. There are some notable exceptions, for example in areas with unusually high rates of trips per capita, such as Reading, Nottingham and Brighton. However, overall, the pandemic has accentuated a trend rather than interrupted it.

We gather that, in some parts of the country, concessionary pass holders have been slower to return to using the bus than those paying for their tickets. On 22 March 2022, Transport Focus embarked on a survey of the views of those entitled to use concessionary passes, seeking to understand the attitudes and circumstances behind their current and future bus use. We are hoping to publish the results in late spring and we will be happy to share the results with the Committee at that stage.

With bus patronage unlikely to return to pre-pandemic levels anytime soon, earlier this month the Government extended bus recovery grants until October 2022. In a few months, many authorities may have to devote as much time to worrying about whether they can maintain services at the current level as to pursuing the improvements we all want to see.

We welcome the fact that the Government spent a considerable sum during the pandemic on keeping bus services going, without which severe damage would have been done to the bus sector. Government has scaled back the £3bn originally promised to fund the ambitions set out in the national bus strategy and appears now to be offering between £1.2bn to £1.4bn of support for improving services. We understand that LTAs bid for five times that amount, so some disappointment is inevitable.

Understandably, the opportunity to bid for significant funding has focused minds on immediate improvements. However, the changes passengers want to see will not be achieved overnight, as acknowledged by the extended timescales of most EP Plans. It is important not to lose sight of the overall ambition and the corresponding need for continuity of funding.

Judging by the many draft EP Schemes we have reviewed, most progress against the national bus strategy will depend on the levels of funding secured, although some measures do not require additional funding. It is too early to assess the speed of progress towards the 2024/25 targets LTAs have set in their BSIPs. However, whatever the levels of funding provided, we do welcome the increased focus on passengers' opinions when setting agendas for change and the processes which are being put in place to make the bus sector more accountable to passengers for their performance.

April 2022

## **Appendix 1: Transport Focus research into travelling during and after the Covid-19 pandemic**

### ***The route ahead: getting passengers back on buses (published in April 2021 and June 2021)***

Transport Focus carried out in-depth qualitative research in December 2020 and January 2021 into current and lapsed bus passenger experiences. This looked at perceptions and expectations of travelling during and after the Covid-19 pandemic.

We found that the public was following guidance to travel less but, beyond this, people had real concern that buses present a risk of infection for themselves or others. Although only a minority of passengers were not following protection measures such as wearing face coverings and social distancing, there was a belief that non-compliance was a serious issue, particularly at times when buses are busiest.

Current users were aware of measures that operators have taken to ensure their safety. However, lapsed users were much less aware of these measures and were influenced predominantly by negative content through word of mouth or the media which directly feeds concerns around non-compliance.

We concluded that there was a key need for reassurance around safety on buses. This should be communicated on the bus and in advance, with both Government and operators using media to convey clear messages, along with other trusted voices such as the NHS.

Passengers' priorities prior to the emergence of the Covid-19 pandemic had not gone away. The bus industry still needs to focus on getting the basics right: frequent, punctual services and value for money 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, such as reduced/discounted fares for a fixed period or deals for travelling to visitor attractions.

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 BSIPs.

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
- 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.

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 bus shelters, 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.

Government should publish prominently, as soon as possible, advice on the safety of non-essential travel on buses and other forms of public transport.

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.

Transport Focus then 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.

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, scheduled for late July 2021, was not viewed solely as a particularly strong incentive for passengers to use the bus a lot more.

However, bus use had 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 was predicted to pick up to almost pre-pandemic levels with nearly all fully lapsed users back on the bus.

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 was closely related with how many other passengers were on the bus and 88 per cent of passengers said they had been travelling on buses that were 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 was 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 felt, the more satisfied they were. 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.

Fully lapsed and non-users were generally not very relaxed about taking the bus with almost half saying they were anxious. Fully lapsed passengers gave several 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 was still present, these two groups said they 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 was needed, as 48 per cent of non-users and 36 per cent of fully lapsed users were unaware of the measures that had been implemented.

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 would encourage a large share of lapsed users to use the bus more, 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.

When seeking information about bus services and the measures being taken to ensure safer travel during Covid-19, current users were 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 were also likely to use local authority or local transport authority websites or apps.

Our recommendations and learning points published as part of our earlier research were confirmed by these survey findings.