



# **Covid-19 Barriers to Transport Recovery**

## **Research Summary Report**

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## **1. EXECUTIVE SUMMARY**

- 1.1. The Consumer Council commissioned qualitative research to understand the impact of the Covid-19 pandemic on consumer views on real and perceived barriers to rebuilding consumer confidence in public transport within, and to and from, Northern Ireland (NI). The research was carried out in consultation with the Department for Infrastructure (DfI), and will inform our work in making appropriate policy recommendations to the Northern Ireland Executive and other stakeholders.
- 1.2. The research was conducted by Social Market Research, using 12 focus groups with 96 NI consumers, conducted via ZOOM during March and April 2021.
- 1.3. This summary report brings together the key findings from the focus groups with selected comments to illustrate.
- 1.4. The full Covid-19 Barriers to Transport Recovery Report which contains the methodology, objectives and findings of the survey is available on the Consumer Council website ([Barriers to transport recovery after COVID-19 | Consumer Council](#)).

## **2. RECOMMENDATIONS**

- 2.1. A post Covid-19 public transport recovery strategy needs to address safety concerns, the cost of travel, the frequency and accessibility of services and emphasise the environmental and lifestyle benefits of public transport.
- 2.2. Policy makers should consider how consumer sentiment regarding the positive environmental impacts of fewer journeys gained during the Covid 19 pandemic, can be harnessed to encourage modal shift and active travel in the long term.
- 2.3. Policy makers need to engage with consumers and have an “honest conversation” explaining both the benefits of reduced car use and the individual sacrifices consumers may be asked to make to achieve it.
- 2.4. Punitive measures to reduce car use must be designed so that the least well off in society are protected.
- 2.5. Translink should continue, and if possible accelerate, its programme of decarbonising its fleet.
- 2.6. Post Covid-19, Translink should consider if there is an opportunity to provide additional services if taxi services are reduced in number.
- 2.7. DfI should consider reviewing the taxi driver licencing process, particularly regarding the length of time it takes to complete, in order to encourage more drivers into the industry.

- 2.8. The new Translink Public Service Agreement should align with the expectations for public transport of the NI Government and consumers.
- 2.9. Airlines and airports should ensure that they continue to follow guidelines on social distancing and face coverings to promote consumer confidence in flying.

### 3. KEY FINDINGS

#### 3.1. Consumer priorities and changes in use for public transport during Covid-19

- Staying safe from Covid-19 was an important priority for consumers in relation to public transport, but not always the most important.
- Older consumers were generally more conscious of Covid-19 safety and gave it higher priority than those who were younger.
- Amongst those for whom Covid-19 safety was less important, accessibility, cost and convenience, were the most frequently mentioned priorities in relation to public transport.
- The main reasons given by consumers for using public transport less during the pandemic were that shops and entertainment venues were closed.
- Whilst most consumers will resume their use of public transport to get to entertainment venues after Covid-19, some said that they may entertain at home more and use public transport less.
- Fear of contracting Covid-19 was the second most frequent reason given by consumers for changes to their use of public transport since the pandemic, and changes to working patterns was the third.
- The majority of consumers in the focus groups are looking forward to getting back to shopping in stores again. Those who used public transport for shopping trips prior to the pandemic are expecting to return in roughly the same numbers.

Quotes from the focus groups:

*“Covid Safety would be the most important thing to me, social distancing and people not wearing masks. I don't have good health, so if I was to get Covid it would probably kill me.” (Lisburn and Castlereagh, male)*

*“Cost is the big thing for me, much more than Covid. It is very costly for ordinary people if you don't have a concession of some kind.” (North Down and Ards, male)*

*“I'm not avoiding transport or afraid of Covid but you can't go anywhere, if everything opened I would go but nothing is open and you can't go anywhere that's the only reason I'm not taking the train or bus or anything else.” (Newry and Mourne, female)*

*“I was working from home for most of Covid, but I'm back now and I use the bus again to get to work.” (Fermanagh and Omagh, female)*

### 3.2. Measures to reduce the risk of Covid-19 and public transport

- The main risks of contracting Covid-19 on public transport were perceived as touch point contamination, proximity to others, and fellow passengers not wearing masks.
- Consumers place great importance on deep cleaning and sanitisation of buses and trains and they would like to see customer sanitiser points made available on board. They want to see greater compliance and enforcement in the wearing of face masks.
- Many consumers are concerned about the number of passengers being carried on buses and trains during Covid-19. They want capacity to be limited for some time yet, with some of the seating blocked off.

Quotes from the focus groups:

*“It would be good if they kept on sanitising trains and buses and make people follow all the guidelines.” (Derry and Strabane, male)*

*“I got the bus once at Christmas and there were too many people not wearing a mask, I wouldn't do it again.” (Belfast, female)*

*“There should be hand sanitisers available on-board buses and trains as you enter and leave.” (North Down and Ards, female)*

*“There should be stricter enforcement of social distancing and mask wearing rules on buses.” (Lisburn and Castlereagh, male)*

### 3.3. Environmental benefit from less travel during Covid-19

- To retain the environmental gains brought about by lower emissions during the pandemic, consumers suggested that fares should be reduced to encourage more use of public transport, and that public transport fleets should go electric or hydrogen-powered as soon as possible.

Quotes from the focus groups:

*“People have got used to not driving their cars and we have made environmental gains, so we need to take steps to stop them going back to old ways. Reduce the train and bus fares to make it all more attractive to people, that is the way to make more people leave the car at home and use public transport instead.” (Derry and Strabane, male)*

### 3.4. Taxis and Covid-19

- Consumers are generally avoiding taxis during the pandemic for the same reasons that they avoid buses and trains. Some feel that taxis are safer than buses or trains, but others think the opposite is true.
- When the pandemic ends and entertainment venues open again, most will go back to using taxis as before.
- Some have concerns that there will be fewer taxis around after the pandemic because many drivers have ceased to operate during the lockdown.

Quotes from the focus groups:

*“I wouldn't feel unsafe in a taxi, as the taxi driver is in the front and you are in the back.” (Mid and East Antrim, female)*

*“Taxis would be the last thing I would use. It's too small a space and you don't know who has been in before you.” (Armagh City, Banbridge and Craigavon, female)*

*“Taxi drivers are not taking as many fares and still have their overheads to pay. Many are looking for new jobs so there may not be as many about after Covid. If we are to have taxis in the future, individual taxi drivers need more financial support right now.” (North Down and Ards, male)*

### 3.5. Active travel during Covid-19

- Whilst some consumers have started to walk or cycle more since the pandemic, this was generally because there was little else for them to do.
- Most consumers are unlikely to walk or cycle as an alternative to public transport after the pandemic, though many will continue to do so for health and fitness reasons.

Quote from the focus group:

*“I do a lot more exercise now as there is not much else to do; I can't swim anymore as the pools are closed.” (Fermanagh and Omagh, male)*

### 3.6. Car use and Covid-19

- Most consumers used their cars less during the pandemic because they were working from home, were furloughed or had nowhere to go. Most will go back onto public transport again after the pandemic, but some will stick to their cars because of convenience or Covid-19 safety concerns.
- Consumers favour persuasion rather than extra charges to encourage people to use their cars less.
- For those who do return to the workplace after periods of furlough or home-working, attitudes to car sharing may have changed. Drivers may no longer wish to share the interior of their car with others. Some say that they will stop car sharing altogether and expect to see more commuter cars with just a single occupant.

- Some consumers intend to use public transport instead of commuting by shared car because they feel that the spaces on buses and trains can be made more Covid safe than a shared car space.

Quotes from the focus groups:

*"I'll be more likely to use park and ride when things get back to normal again. I have got used to not taking the car into town". (Belfast, male)*

*"I use my car much more now as I wouldn't use public transport. I feel safe in my own car and I'll keep on using it instead of public transport." (Armagh City, Banbridge and Craigavon, male)*

*"People won't want to go back to car sharing because of Covid, they will stick with their own car. So they need to invest in more park and ride as there will be more cars in the rush hour." (Antrim and Newtownabbey, male)*

*"Encourage people through education and environmental messaging not by charging them." (All N.I, male)*

### 3.7. Air travel and Covid-19

- Travelling by aircraft raises the highest level of Covid-19 fears and most consumers are wary about flying in the next few months.
- Consumers' main concerns about being on an aircraft are the proximity of fellow passengers for a prolonged period of time, a distrust of airlines' cleaning and sanitisation procedures, and the potential for Covid-19 transmission when boarding and exiting a plane.
- Consumers want to see fewer passengers on each flight, spaced adequately.
- Consumers need assurances that planes are being sanitised effectively. Lengthening turnaround times to allow for effective sanitisation would help to build the confidence of potential flyers.
- Consumers are unlikely to travel to holiday or leisure destinations until there is a much lower risk of having to quarantine upon return. The risk of losing money or having problems getting it back are major deterrents to booking a holiday at this point in time.

Quotes from the focus groups:

*"I'd love to get away and I probably will when things open up, but I'd not like anyone sitting beside me on a plane." (Fermanagh and Omagh, female)*

*"I would like to see confirmation that safety/cleaning checks have been carried out by an independent body that can validate that the airport is being run correctly. Not just a tick list exercise like the cleaning schedules in the public toilets." (Mid and East Antrim, female)*

*“I'd go on a plane on holiday, but I'd be frightened of getting stuck abroad. Quarantine and testing puts me off going anywhere.” (Fermanagh and Omagh, female)*

*“I would want to see more Covid safety measures introduced at the airport in terms of social distancing at squeeze points like going through security and boarding the plane.” (Lisburn and Castlereagh, female)*

### 3.8. Ferry travel and Covid-19

- From a Covid-19 perspective, ferry travel is considered by consumers to be much safer than airline travel. Consumers have confidence that they will be able to have enough space on-board to avoid the dangers of Covid-19.
- Sanitising is less of an issue on ferries than it is on planes and passengers feel they can take sanitising responsibility for themselves.
- Ferry companies are seen as having more flexible policies on changing bookings and offering refunds. Compared with airline travel, there is much less worry amongst consumers about losing money if ferry arrangements have to be changed or cancelled.

Quotes from the focus groups:

*“I'd go on a ferry no problem. You have a much better chance of getting space and you can go outside on a good day.” (Belfast, male)*

*“I think ferry companies on the whole are more flexible when you have to reschedule a trip compared to airlines so the same fear of losing money is not there.” (Mid and East Antrim, male)*

### 3.9. Leisure travel and holidays

- With so much uncertainty about restrictions and the fear of contracting Covid-19, some consumers in the focus groups are looking closer to home for leisure travel and holidays.
- Some consumers report spending their holiday budget on their homes and gardens during the pandemic and indicate that they have further plans to invest in their homes in the next few years, redirecting travel money to pay for it.

Quotes from the focus groups:

*“It's too uncertain to travel abroad at the moment, so definitely not this year.” (Derry and Strabane, female)*

*“Yes, we will stay at home this year instead of going away and spend the money on the house and garden, it will be a few years before we go away again.” (Derry and Strabane, female)*



### 3.10. Financial support for transport services during Covid-19

- Most consumers do not want to see public money used to subsidise airlines or ferry companies, but they are more relaxed about Translink receiving public investment.
- Consumers want to see commitments to improving bus and train services if a “pandemic subsidy” is to be given to Translink.
- Many consumers think that taxi drivers need further financial support to make their services financially viable in the short term and to ensure that taxi services continue to be available in the longer term.

Quotes from the focus groups:

*“I’d be happy enough for the trains to be subsidised but only if they reopened up more lines or put on more services.” (Lisburn and Castlereagh, female)*

*“Big private companies like the airlines or Stena should not get anything. They make a profit from us when times are good, so they should be able to weather the bad times.” (Derry and Strabane, male)*

### 3.11. Consumer protection and travel during Covid-19

- With uncertainty and worry about financial losses high on the agenda for consumers, greater publicity about the rights and protections available to them is likely to be needed as part of confidence building in the transport and travel sectors.

Quotes from the focus groups:

*“I’d need help on my rights, the processes and who to contact. An advice agency would be good to go to directly to help me get started making a claim.” (Fermanagh and Omagh, male)*

## 4. Conclusion

- 4.1. Regarding attitudes to post Covid-19 car and public transport use, there is no clear picture of how this will look. Views expressed on this varied with individuals experience during the pandemic. Whilst many consumers are likely to return quickly to using public transport when restrictions ease a smaller group who fear contracting Covid-19 are likely to need a great deal of persuasion and reassurance if they are to use public transport to their former extent after the pandemic. Public transport operators will need to address sanitisation, distancing and mask enforcement. For some the experience of Covid-19 made them appreciate not using their car.

- 4.2. It will be a challenge for policy makers to devise a recovery strategy that resonates with all previous and potentially new users of public transport. However, the experience of the pandemic itself may act as a recruiter to public transport for some, particularly once they feel confident that it is safe to travel on public transport.
- 4.3. It is also worth noting that many respondents expressed concerns with public transport unrelated to Covid-19 such as frequency of service and the accessibility of routes. These along with affordable fares, an emphasis on the environmental and lifestyle benefits, and the addressing of safety concerns should be in a post Covid-19 public transport recovery strategy.
- 4.4. Many consumers have begun walking or cycling during the pandemic. This is mostly for recreation and exercise and not as an alternative to public transport. More work will need to be done to capture the increase in active travel and extend it into work and shopping journeys.
- 4.5. Many consumers have noticed positive environmental impacts as a consequence of fewer journeys being taken either by car or public transport. This is of particular interest in the context of ambitions to decarbonise transport. Policy makers should consider how these sentiments can be harnessed to encourage modal shift and active travel.
- 4.6. Many consumers would support action designed to discourage car use but are opposed to measures that are punitive. Policy makers need to engage with consumers and have an “honest conversation” explaining both the benefits of reduced car use and the downside to individual consumers that this may entail. Punitive measures must be designed so that the least well off in society are protected.
- 4.7. Many consumers think that Translink has an opportunity to contribute more fully to the reduction of greenhouse gases by rapidly changing their fleets to electric or hydrogen power. Such a move, consumers argue, would create a greater commitment to using public transport and thereby discourage car use. Translink should therefore continue with, and if possible accelerate, its programme of decarbonising its fleet. This would increase the 55% in the Translink Covid Brand Tracking Survey who claimed they would consider the option of using public transport as a sustainable or more environmentally friendly mode of transport in future.
- 4.8. Given that some expressed fears that there could be fewer taxis available after Covid-19 Translink should consider if there are opportunities to provide additional services to fill the gap if it emerges.
- 4.9. Air travel raised the highest level of Covid-19 fears due to a range of infection risks and the uncertainty around travel restrictions. Airlines should consider how to address issues which are under their control in terms of additional sanitisation and social distancing on board and at entry and exit points.

- 4.10. Most consumers are relaxed about Translink receiving a “pandemic subsidy” provided there are commitments to improving bus and train services. Whilst public funding of Translink remains a challenge, it is important that its use of public subsidies are closely monitored and that consumers can see they are getting value for money. In this respect the new five year Public Service Agreement currently being developed by the Department for Infrastructure is important. It needs to set clear expectations, objectives and standards for Translink. It must be closely monitored using robust data and be transparent so Translink passengers and the general public can see how their money is being spent.
- 4.11. Given the uncertainties around travel during the pandemic and as restrictions are lifted, additional efforts should be made to make consumers aware of the protections and advice services available to them. The Consumer Council has an important role to play in this and will continue to work with transport operators and stakeholders to promote consumer protection in transport services.

## **5. NEXT STEPS**

- 5.1. We will use the research findings to work with Dfi on transport policy and strategy issues. We will also share the report with Translink, NI airports and other stakeholders.



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