



CILT Bus & Coach – Covid-19 2021 Report



Covid-19

The Chartered Institute of Logistics and Transport's Bus & Coach benchmarking club, BusMark, represents members operating a collective fleet of 19,000+ passenger carrying vehicles.

The club enjoys the valued support of 4 topic sponsors - LYTX (Operational Risk & Safety), OMNIBUS (Operations), MIX TELEMATICS (Technology) and OPTARE (Environment).

To help the BusMark committee in identifying relevant topics for attention and discussion at the quarterly club meeting(s), members are asked to complete a short snapshot survey.

In the first quarter of 2021, members' views were sought on:

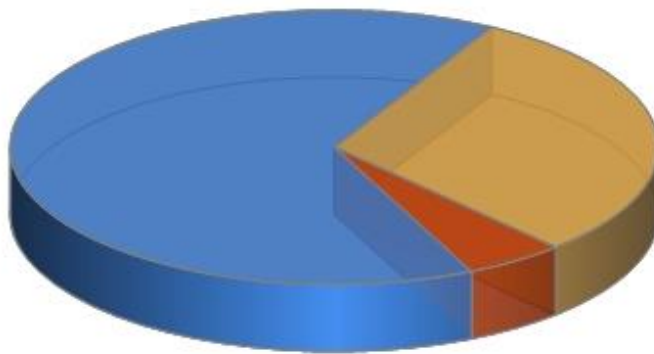
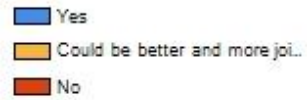
- 1 – How the bus & coach profession has been represented, since the introduction of the initial lockdown measures
- 2 – How operations have been impacted during this most challenging of times
- 3 – How Local Authorities have performed within this period

With thanks to our participating Busmark members, here are the findings



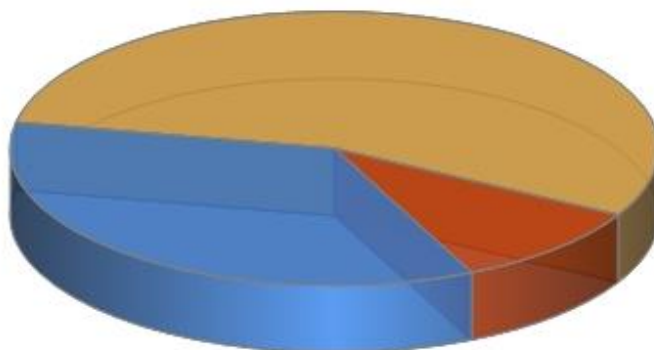
Key findings...

3. Do you feel that the Bus & Coach industry's concerns are being delivered to Government in an effective manner?



- Yes – 63%
- Could be better and more joined up – 32%
- No – 5%

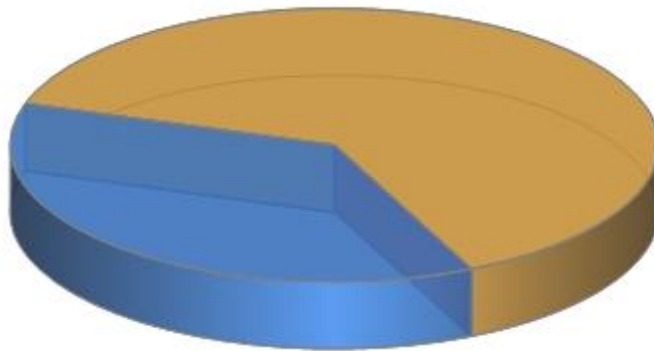
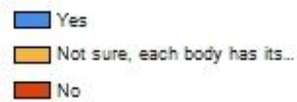
4. Do you believe that you have adequate support to help your PR efforts in encouraging pre-Covid patronage to return to public transport with confidence?



- Yes – 32%
- More supporting evidence and data would help our cause – 58%
- No – 10%

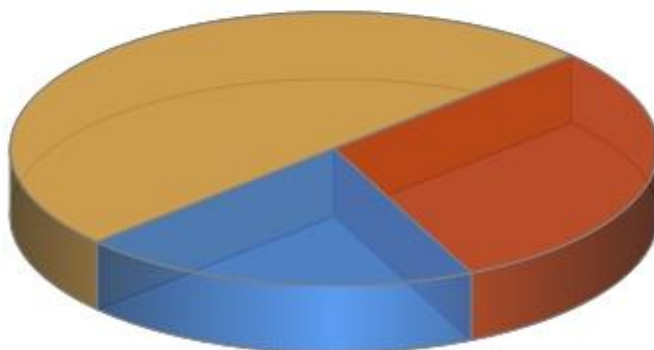
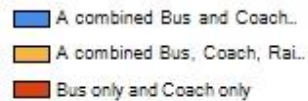


5. Should closer collaboration between the profession's representative bodies, speaking with a unified industry voice, be sought?



- Yes – 37%
- Not sure, each body has its own role, but the messaging should be the same and coordinated – 61%
- No response – 2%

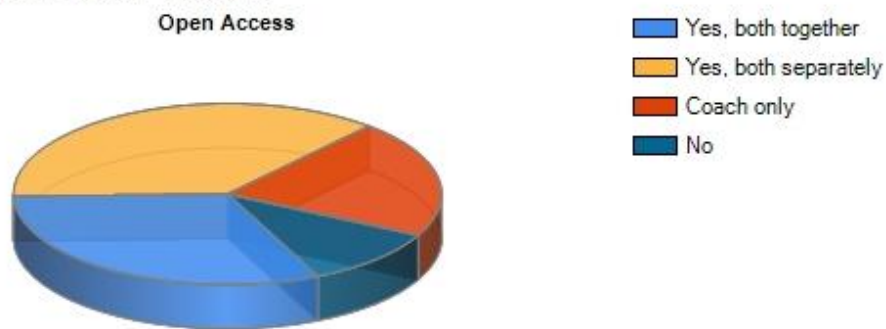
6. Should future highlighting of the plight of passenger transport be delivered as?



- A combined bus and coach campaign – 21%
- A combined bus, coach, rail, light rail and tramway campaign – 47%
- Bus only and coach only – 32%



7. Do you think the Government should be asked to promote a “take a UK break by coach or train after the pandemic” campaign?



- Yes, both together – 32%
- Yes, both separately – 32%
- Coach only – 21%
- No – 10%
- No response – 5%

8. If road traffic levels remain, as they currently are, how many vehicles could you save from your pre-Covid peak output (what percentage of PVR)?

Responses ranged from 0% to 40%, but an average was 7.9% PVR saving.

9. What percentage of your pre-Covid patronage are you currently carrying?

Again, responses varied from a high of 39% to 0%. However, the average was found to be 25%.

10. What percentage of pre-Covid passenger miles are you now operating?

Your average response was 74%.



11. What percentage of patronage do you expect to return by:

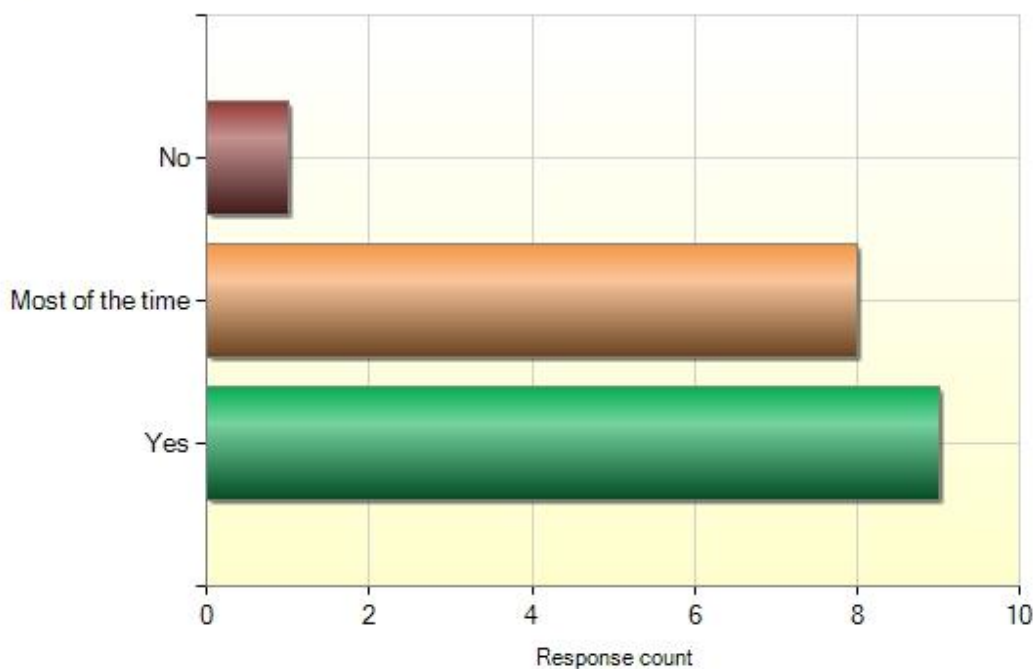
Based on a combination of projected modelling and educated guesswork:

- March 2022 – 82.5%
- March 2023 – 91%
- March 2025 – 98%

12. What percentage of pre-Covid passenger miles would you be expecting to operate by:

- March 2022 – 90.7%
- March 2023 – 92%
- March 2025 – 95%

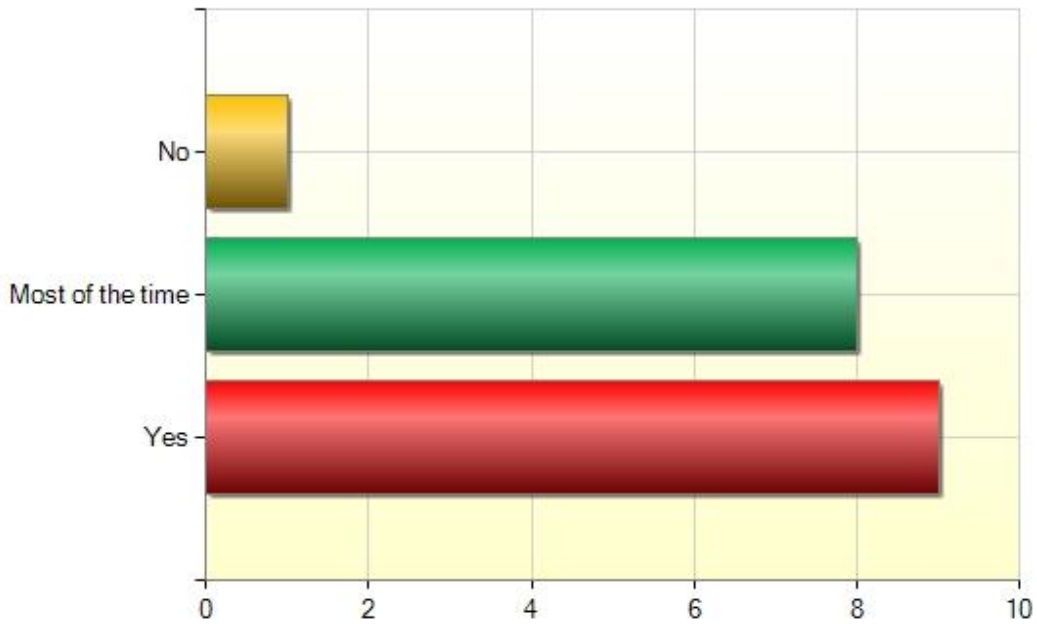
13. Do you think the local authority (ies) in your area coped well with agreeing services for key-workers?



- Yes – 50%
- Most of the time – 44%
- No – 6%

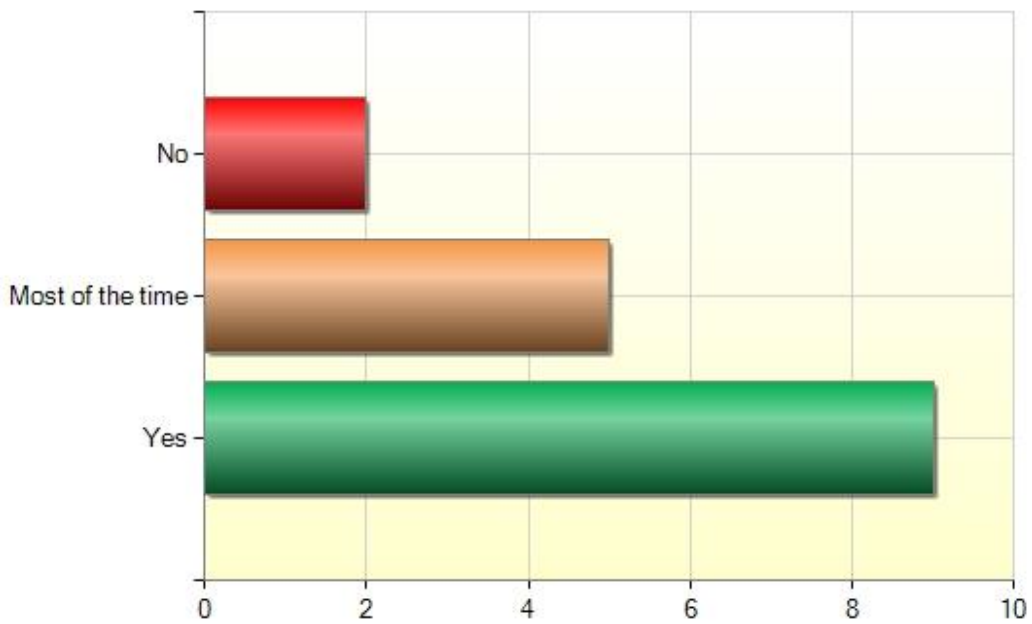


14. Do you think the local authority (ies) in your area coped well with agreeing and arranging services for schools?



- Yes – 44%
- Most of the time – 50%
- No – 6%

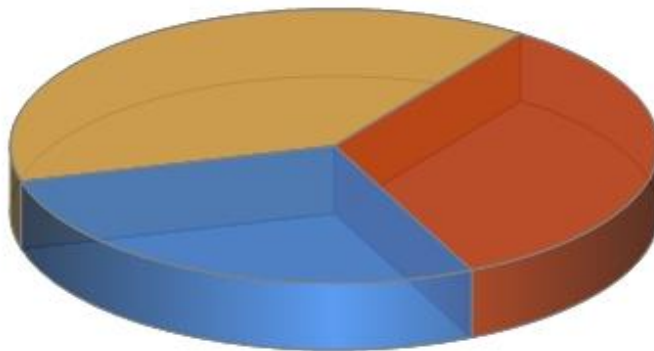
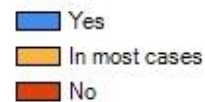
15. Do you think the local authority (ies) in your area coped well with keeping bus operators informed?



- Yes – 50%
- Most of the time – 36%
- No – 14%



16. Do you think the local authority (ies) in your area coped well with maintaining clear passage for buses alongside emergency “active travel” measures?



- Yes – 20%
- Most of the time – 40%
- No – 40%

Summary...

So our findings revealed that in representation, 63% felt that the Bus & Coach industry’s concerns had been delivered to Government in an effective manner, although 61% were not sure if a closer collaboration between the profession’s representative bodies, speaking with a unified industry voice, should be sought, as each body has its own role but the messaging should be the same and co-ordinated.

In our Operations section, we learned that the respondents were currently carrying an average of 25% of their pre-covid patronage (although individual responses ranged from 39% to 0%). Looking ahead to future, anticipated patronage numbers, and based on a combination of educated guesses and projected modelling, members are hoping to see an 82.5% return by March 2022, rising to 91% by March 2023.



In our final section, which looked at local authority performance, responses showed a general member satisfaction, although only 20% of respondents felt that the local authorities had coped well, *all of the time*, in maintaining clear passage for buses, alongside emergency 'active travel' measures.

We hope you have found this report to be of interest, and for further information about the benefits of Busmark, please contact Chris Ruane:

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