

Getronics Bus Trust Tracker 2025



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Introduction

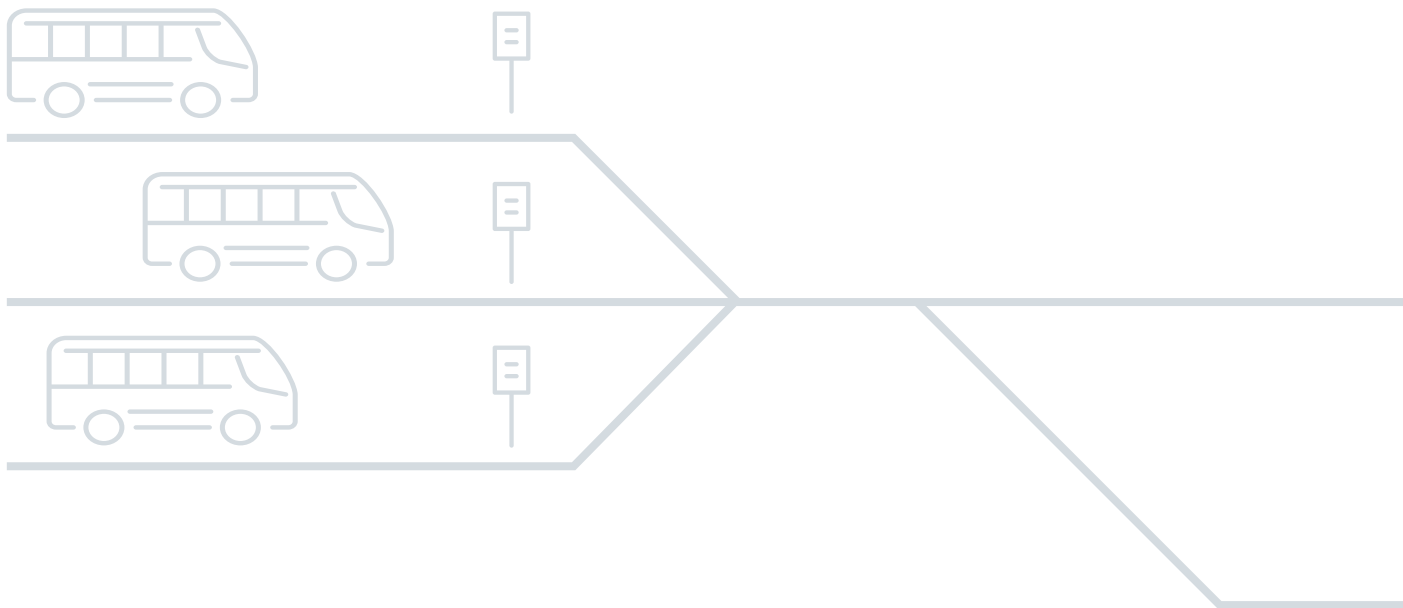
The bus industry continues to face a challenging landscape. Outside of London, passenger numbers remain nine per cent below pre-Covid levels, with 15 per cent fewer bus miles operated since 2019.

In an effort to get people back on board, both government and private operators are going full speed ahead on sustainability. Earlier this year, a further £37.8 million was allocated through the Zero Emission Bus Regional Areas (ZEBRA) scheme to help fund 319 new green buses across the UK.

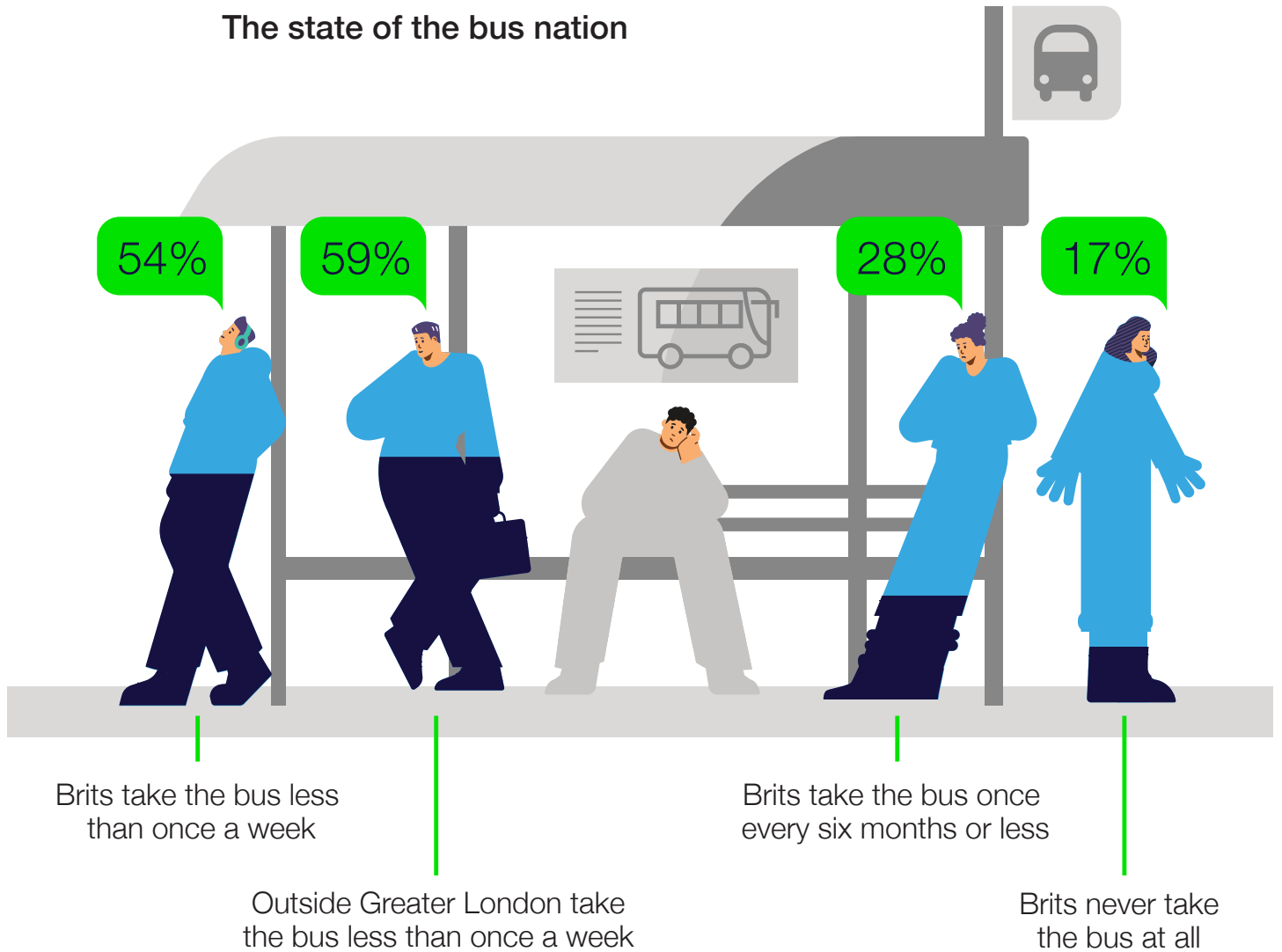
But while greener fleets are essential, their impact will be limited if we don't see more people choosing to travel by bus. The real opportunity lies not only in electrifying vehicles, but in transforming the passenger experience – making journeys simpler, safer and more reliable.

Buses have always been a vital part of Britain's transport ecosystem. They connect towns and villages, support local economies and offer an essential service for millions who rely on public transport every day. Yet, despite their social and environmental importance, for many people the bus has slipped down the list of preferred ways to travel. The Getronics Bus Trust Tracker explores why.

Based on research conducted among 2,500 UK residents, it examines how people really feel about buses today – how often they ride, what stops them and what could get them back on board. Crucially, it looks at the role of technology in shaping that future and reveals that while sustainability matters, trust, information and passenger experience hold the key to getting the UK back on board.



The state of the bus nation



The bus remains one of the most widely available modes of transportation, yet usage varies considerably, even among those with direct access to bus routes.

Our research shows that 54% of Brits take the bus less than once a week. Outside of Greater London, that figure rises to 59%, highlighting a divide between the capital's extensive transport network and the rest of the UK. For more than a quarter of people, 28%, the bus is something they board just once every six months or less, and 17% of Brits say they never take the bus at all.

That is a lot of empty seats, and an even bigger opportunity.

Despite major investment in clean fleets and fare initiatives in some regions, usage has not fully recovered to pre-pandemic levels. Beneath these topline numbers, however, a more nuanced story emerges – one shaped by geography, perception and technology.



A country of contrasts

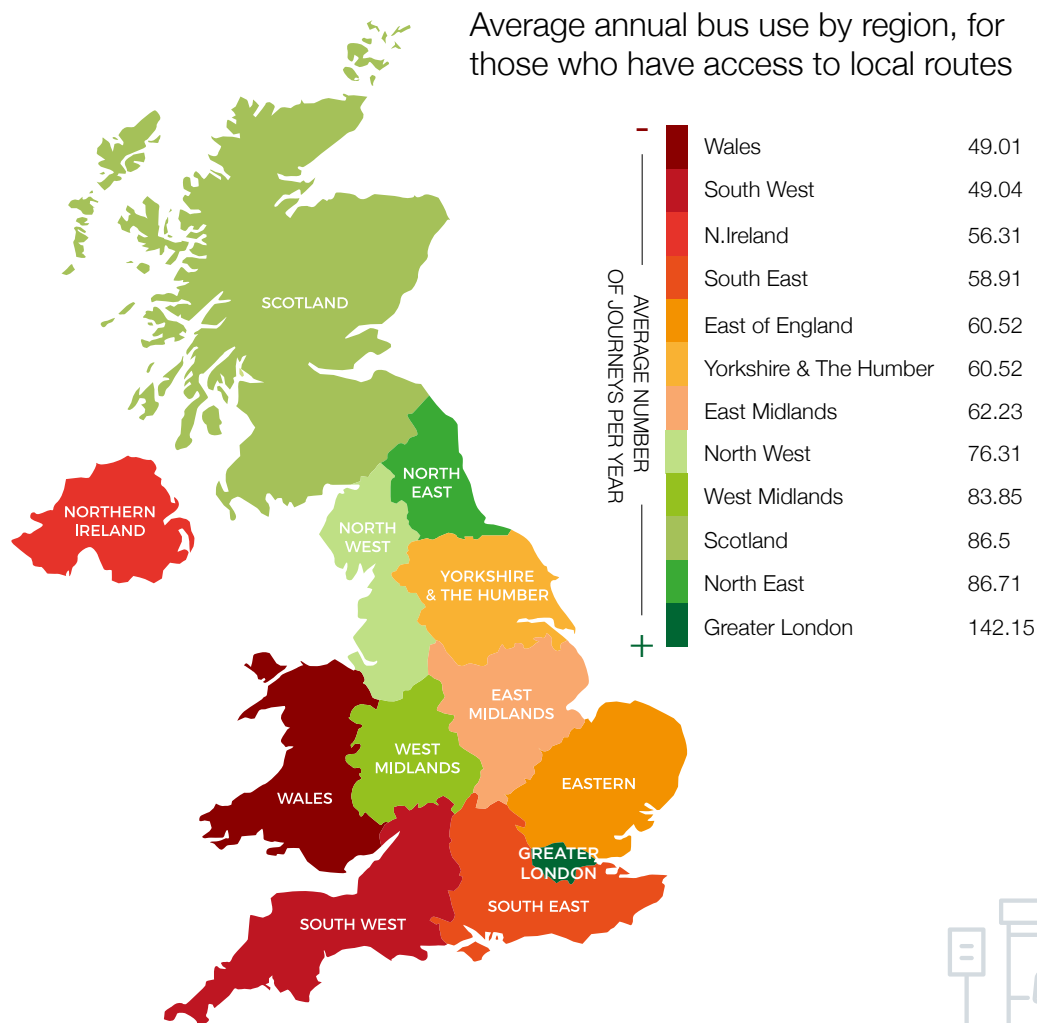
In Greater London, people use the bus an average of 142 times per year, around three times a week. By contrast, passengers in the South West and Wales take the bus 49 times per year, roughly once a week.

It is not simply about geography. Local culture, ticket pricing and perceptions of reliability all shape behaviour. In London, a single capped fare and integrated travel system make bus journeys predictable and affordable. Elsewhere, the story is less straightforward.

In the West Midlands, 29%, East Midlands, 28%, and the South East, 27%, of people are likely to say that fares are too expensive. This is the single biggest deterrent to bus travel in these areas, outside of reliability concerns.

In London, people take the bus around 99 times per year (roughly twice a week) but in Bristol, that figure drops to just 48. It's a reminder that even in major cities, where population density and travel demand are high, frequency of use isn't guaranteed. Something beyond geography or affordability is shaping behaviour.

When asked how often they would use the bus if a convenient route met their regular travel needs, Londoners again topped the chart, saying they would travel by bus around three times a week or 172 times per year. In Wales, the average drops to 74 times per year, showing that even when the infrastructure exists, other barriers persist.



Regional nuances

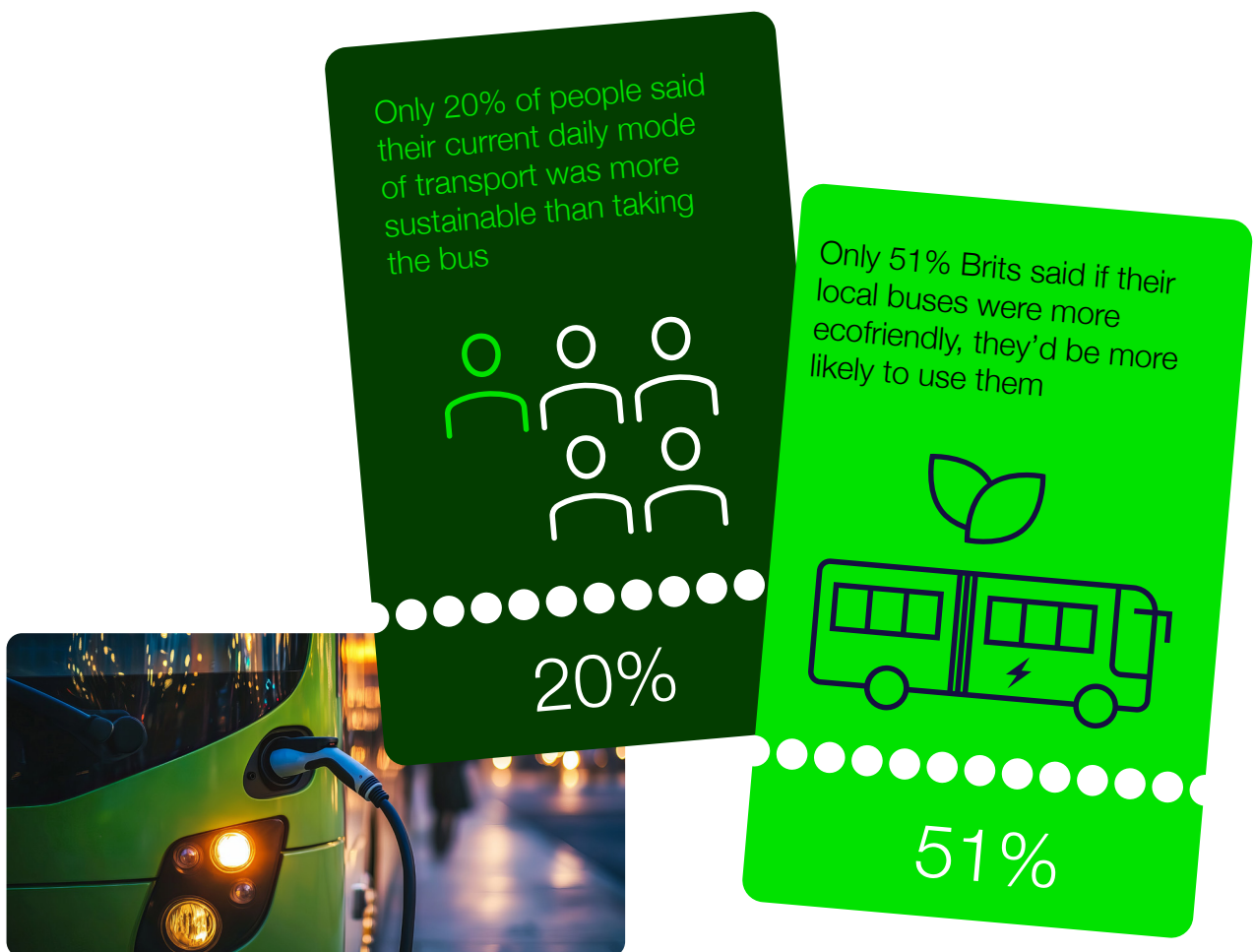
In Scotland, there is a clear link between environmental awareness and openness to public transport. 63% of people in Edinburgh said they would be more likely to take the bus if the fleet were more eco-friendly, compared to just 37% in Cardiff.

Perceptions of safety also vary. In London, 63% of respondents said feeling safer would make them more likely to use the bus, while in Wales only 28% agreed.

Trust and optimism are much higher in regions with major investment in transport integration. In Edinburgh, 58% of residents said they are likely to use the bus more often in the next 12 months, with 55% in London and 54% in Manchester saying the same. In Sheffield, that figure drops to 31%. Where joined-up transport exists, confidence follows.

The sustainability factor

People know that buses are a more environmentally friendly option, but this does not automatically translate into action. Only 20% of people said their current daily mode of transport is more sustainable than taking the bus; however most are still choosing other modes of transport for their daily travel.



Half of those surveyed in Greater London (53%) the East Midlands (50%), the North West (50%) and the East of England (48%) agree that bus travel is more sustainable than their usual journey. Despite this, when asked about eco-friendly upgrades, only 51% of Brits said they would be more likely to use buses if the fleet were greener, such as using electric or hydrogen vehicles.

That is an encouraging signal for operators investing in low-emission technology. But it also shows that sustainability alone is not enough. The decision to travel by bus depends on a lot more than just reducing environmental impact.



What's stopping people?

When asked why they do not take the bus more often, respondents highlighted a number of barriers.

The top ten were:

- | | |
|--|---|
| 1. Buses are often delayed or not on time (30%) | T |
| 2. Journey time by bus is too long (30%) | T |
| 3. Buses are often overcrowded (24%) | T |
| 4. Bus fares are too expensive (22%) | |
| 5. Lack of reliable information about times or routes (15%) | T |
| 6. The physical experience of bus travel is uncomfortable (15%) | |
| 7. They are not easily able to access bus services where they live (12%) | |
| 8. Buses do not connect well with other transport (11%) | T |
| 9. They do not feel safe on buses (8%) | T |
| 10. Lack of onboard features such as Wi-Fi or USB charging (7%) | T |

70% of these issues can be directly improved through improved technology. This shows that where confidence lags, technology can lead.

NOTE: The factors featuring T are all things that can be overcome with tech.

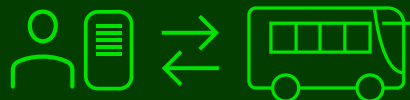
The technology turning point

Brits are clear about what they want from bus companies, and much of it involves using technology to make journeys more transparent, predictable and pleasant.

69% of people told us that bus companies could make technological changes that would make them more likely to travel by bus or that would improve the experience.

That is more than two thirds of the UK who would be more likely to take the bus if technological measures were employed to improve passenger experience. This is a huge opportunity, not only for bus operators to fill seats, but for the UK to hit its net zero targets.

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Respondents told us the three most impactful changes would be:

Accurate live information
about their bus route

21%



The ability to see in advance
how busy the bus will be

20%



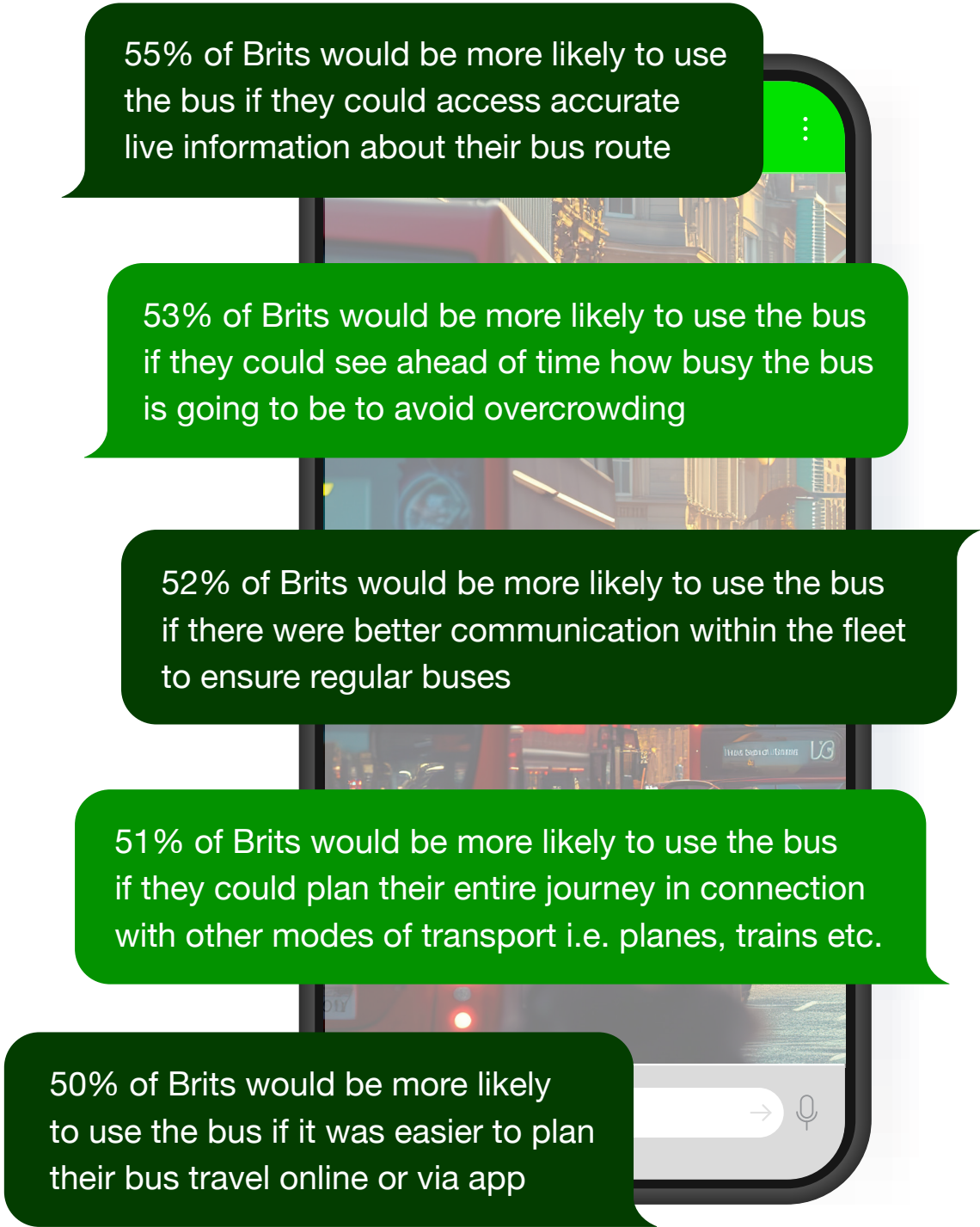
Better communication within
fleets to ensure regular services

18%



This appetite for digital improvement also spans generations. Younger groups are the most enthusiastic with 86% of 16 to 24-year-olds and 88% of 25 to 34-year-olds saying better tech would encourage them to use buses more, however even among those aged 55 and over, 51% agreed.





55% of Brits would be more likely to use the bus if they could access accurate live information about their bus route

53% of Brits would be more likely to use the bus if they could see ahead of time how busy the bus is going to be to avoid overcrowding

52% of Brits would be more likely to use the bus if there were better communication within the fleet to ensure regular buses

51% of Brits would be more likely to use the bus if they could plan their entire journey in connection with other modes of transport i.e. planes, trains etc.

50% of Brits would be more likely to use the bus if it was easier to plan their bus travel online or via app

Technology does not just improve convenience. It is the single biggest thing operators can do to get people back on board with bus travel. When passengers feel informed and in control, they are far more willing to choose the bus over other forms of travel.



Passenger trust

Trust in transport is not only about safety or data protection. It is about reliability. Passengers need to know the bus will arrive when expected, that fares are fair and that information is accurate.

In our interviews, passengers often spoke about uncertainty. As one commuter put it: “When the bus works, it’s great. But so often it’s late and there’s no way to know when it will arrive or whether it will be massively overcrowded when it does. It’s not a risk I’m willing to take on my commute.”

Technology cannot solve everything, but it can deliver the accountability passengers are looking for. Real-time tracking, predictive maintenance, automated fleet coordination and accurate passenger apps can all help to rebuild confidence.

When passengers can trust the service to do what it says, that trust extends to the brand and the operator behind it.

What this means for bus operators

For operators, the implications of this research are both practical and strategic.

- Invest in passenger-facing technology, not only back-end systems. Real-time information, predictive tools and clear service updates build day-to-day trust.
- Integrate across modes. Passengers want to plan whole journeys, not just bus routes. Collaboration between bus, rail and local transport providers will drive long-term loyalty.
- Communicate reliability. When delays happen, be transparent and ensure you have up-to-date live information.

The opportunity is clear. The desire for technology-driven change exists across all age groups and regions. The next move belongs to the operators.

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Conclusion: passenger experience is king

Buses are the quiet workhorses of the UK's transport system. They keep towns, cities and communities connected and offer a unique opportunity to reduce the nation's carbon footprint...if only more people chose to get on board.

The Bus Trust Tracker highlights a public frustrated by the outdated technology that underpins bus travel. People want to use buses more often, but improving the passenger experience must be the priority and technology is central to making that happen.

From accurate live information and simpler journey planning to better communication and more reliable services, tech-enabled improvements can make bus travel faster, safer and more predictable.

The destination is clear: better passenger experience will mean fuller buses.

Methodology

Quantitative research was conducted by Censuswide among a sample of 2,500 UK residents in October 2025. Censuswide abides by and employs members of the Market Research Society and follows the MRS Code of Conduct and ESOMAR principles. It is also a member of the British Polling Council.

Qualitative research was undertaken by Getronics, including in-depth one-to-one interviews with five UK residents who regularly use or have access to local bus routes.

