

V O L V O

THE NEW COACH EXPERIENCE

Volvo Buses Insights Report 2022



**“As the market changes and the map is
rewritten as we go, you really need to understand
what your passengers appreciate.
And what makes them book that next journey.”**

Anna Westerberg
President
Volvo Bus Corporation

Whatever comes ahead

At Volvo Buses, we recognize that knowledge is a business advantage, but more importantly we are genuinely interested in what's meaningful to people when travelling. What really matters to all the passengers and drivers who ride in and drive coaches every day.

Is the pandemic a total game changer or just a bump in the road? When will things fully go back to normal? What will normal look like? I think you will agree that these are big questions for the coach industry right now. Of course, now more than ever, it is crucial to know what's on peoples' minds if we are to adapt to new demands. We want to gain a deeper understanding of their needs, what their experiences are of coaches today, and what their demands and expectations are for the future.

To gain valuable insights, Volvo Buses together with research institute Kantar conducted a survey among 9,000 coach passengers in Sweden, Germany, France, Italy, Spain, the UK, Australia, Mexico and Brazil. We also conducted a global driver survey, with 800 participating coach drivers. The results are presented in this report.

It's an interesting read. Especially regarding the differences between the various countries, and between passengers in the younger versus the older generation. We can see that convenience, safety and

comfort are important values in the older demographic, while the main selling point for younger passengers is that travelling by coach is inexpensive. At the same time, young passengers are very positive to paying for extra services, especially for fast wi-fi. And these passengers are a big part of our future customer base and the entire global coach business. We need to understand the new generation's perspective and meet their needs to be able to get more people to choose travel by coach, both intercity and charter.

“9,000 coach passengers in Sweden, Germany, France, Italy, Spain, the UK, Australia, Mexico and Brazil. We also conducted a driver survey, with 800 participating coach drivers.”

At Volvo Buses, we regularly conduct research and surveys to gain new insights and inspiration for our development work. This report is an important part of this work, and we are happy to share it with everyone who is interested in getting to know coach passengers and drivers a little bit better. Hopefully it will also help create a clearer picture of what the ultimate coach experience can be – whatever comes ahead.

Dan Pettersson
*Head of International
Volvo Bus Corporation*



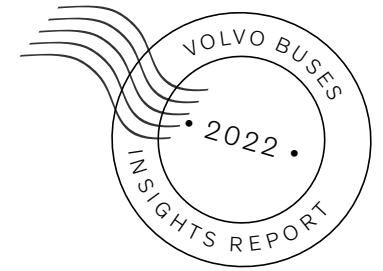


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Chapter 1: The passenger

90% of young adults (18–29 years) are willing to pay extra for add-on services.



The new normal

The last time that we conducted a coach passenger survey was in 2018. Since then, the pandemic has transformed nearly every aspect of our world, with dramatic shifts in our jobs and in our travel, social and meeting habits. Business travel was more or less canceled in the first year of the pandemic and will probably struggle to return to “pre-pandemic normal”. And today, although many countries are open, we are still facing the long-term effects, such as a global recession. So, how fast is the coach business recovering?

We asked passengers about if, how and when they are planning for their next coach trip, and what safety measurements they would like the coach companies to take for them to feel safe to travel again.

The good thing is that 65% are planning for a coach trip within a year. The most in Brazil and Mexico, with 81% and 85%. And the least in Sweden with 44% planning to take a coach trip in the coming year. However, it appears that Swedes’ reluctance doesn’t seem to have that much to do with the pandemic. When asked if they feel confident about booking a coach ride in the light of the pandemic,

58% of Swedish passengers say they feel confident today, and as many as 76% say they will feel confident within the year. Passengers in France and Germany on the other hand seem to be the most cautious in light of the pandemic, with only 4 and 12% respectively saying they feel confident to book a coach ride today. This should be compared with an average of 32%.

65% of passengers say they are planning to take a coach trip within the coming year. The most in Brazil and Mexico, with **81%** and **85%**.

Are you planning to take a coach trip in the next 12 months?

	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Yes	65%	53%	44%	63%	61%	75%	73%	81%	52%	85%
No	16%	26%	34%	12%	16%	5%	8%	10%	24%	7%
Don't know	19%	21%	22%	25%	23%	20%	19%	9%	24%	8%

75%

answer that they feel confident enough to book a coach trip again after the pandemic



In light of the pandemic, when would you be confident about booking your next coach ride?

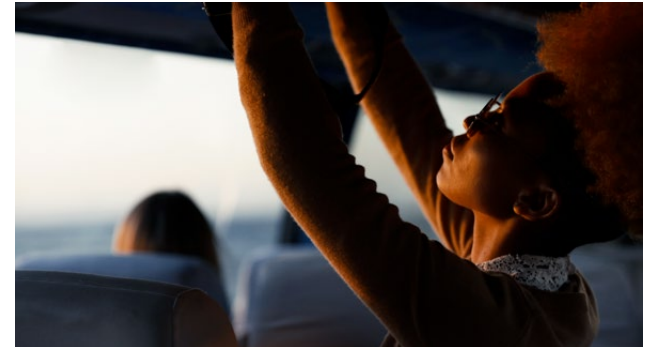
	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Today	32%	35%	58%	4%	12%	27%	57%	41%	24%	33%
Within 6 months	29%	24%	10%	38%	33%	42%	20%	31%	25%	39%
Within a year	14%	15%	8%	17%	25%	13%	6%	10%	20%	9%
Don't know	14%	15%	18%	32%	15%	9%	8%	6%	12%	5%
More than a year	5%	7%	2%	5%	10%	6%	3%	4%	10%	2%
When a COVID passport is required onboard	4%	3%	3%	3%	4%	3%	5%	5%	7%	6%
When I've been fully vaccinated	2%	1%	1%	1%	1%	0%	1%	3%	2%	6%

When looking at the age parameter, you might think that elderly passengers would be more cautious than young adults, but surprisingly we don't see any significant differences here between the age groups.



High interest in onboard air filters

So, what can coach companies do to make passengers more confident about travelling by coach? The survey shows there is considerable interest in enhanced hygiene onboard. 37% want coach companies to take special measures to enhance onboard hygiene, like offering hand sanitizer or requiring face masks. And as many as 45% say they feel it is important for coach companies to have air filters that clean interior air from viruses and bacteria. In Brazil and Mexico, as many as 56 and 62% say they want hand sanitizer and masks, while 53 and 57% want onboard air filters.



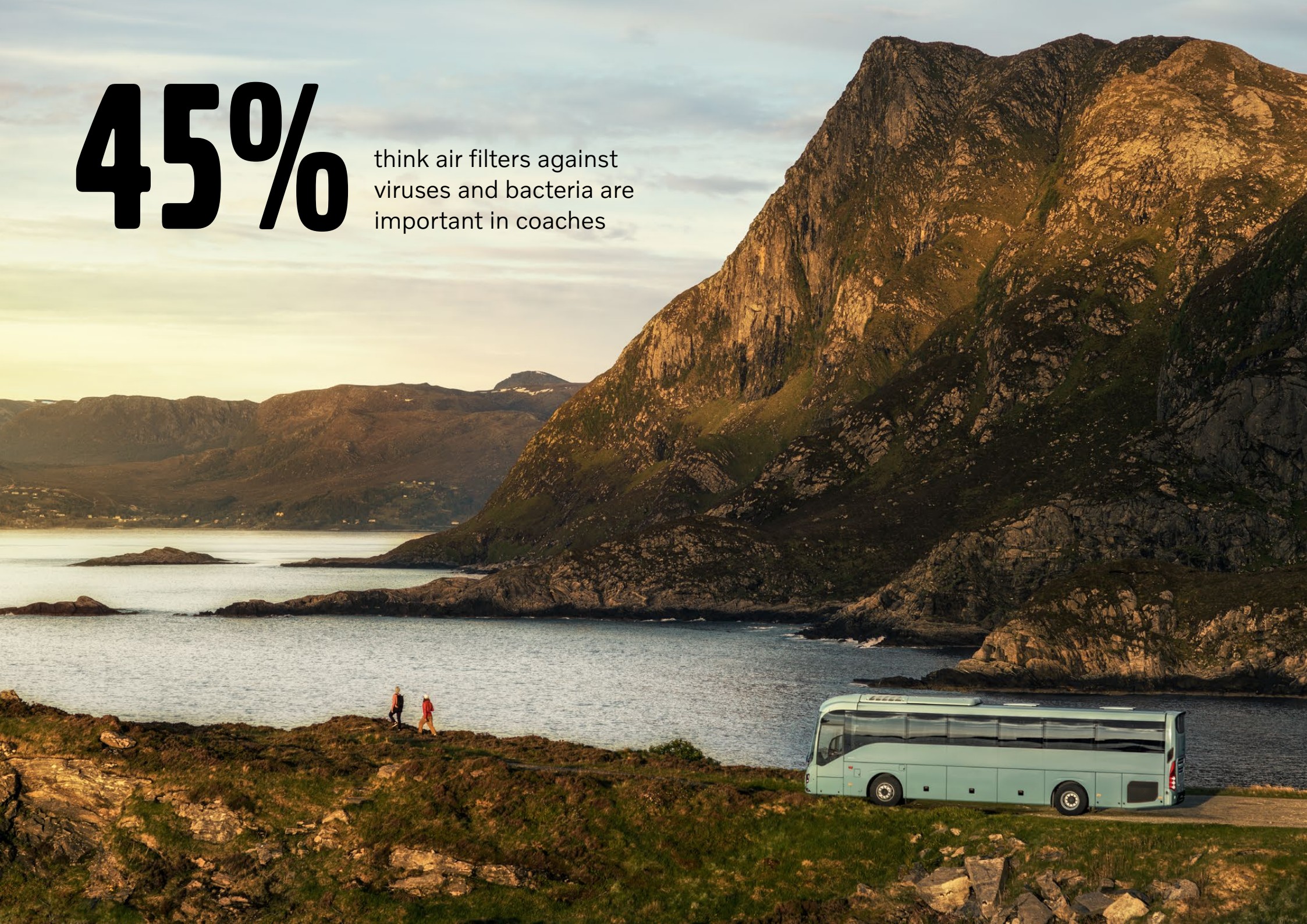
In light of the pandemic, what safety measurements do you consider most important when choosing a coach company?

	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Cancellation/change flexibility and ticket conditions	52%	51%	72%	58%	53%	53%	55%	33%	57%	34%
Onboard air filters that clean interior air from viruses and bacteria	45%	43%	28%	38%	43%	47%	52%	53%	48%	57%
Special measures to enhance onboard hygiene (eg hand sanitizer, masks)	37%	34%	12%	31%	32%	32%	38%	56%	38%	62%
Spaced seating	36%	31%	42%	31%	37%	31%	43%	35%	36%	40%
Sanitization levels of coach bus in between trips	34%	29%	30%	30%	29%	50%	31%	49%	28%	34%
Covid vaccination passport required	21%	17%	14%	24%	18%	21%	14%	31%	29%	24%
Prearranged seat selection	13%	17%	21%	8%	18%	11%	12%	9%	12%	10%
None of the above	4%	9%	6%	4%	5%	2%	2%	1%	4%	0%
Other	0%	1%	1%	0%	1%	0%	0%	0%	1%	0%

Passengers were asked to select 1–3 aspects.

45%

think air filters against
viruses and bacteria are
important in coaches



Customer values

Satisfied passengers are essential for a successful coach business. They will most likely return for their next trip and recommend your business to relatives and friends. Appreciation from happy customers is also important to drivers. So, in the passenger survey we have explored what factors are most important for creating a good coach experience – step by step. What do passengers like to do when travelling by coach, and which services meet their needs? In this chapter coach companies might just find ideas for how to gain a competitive edge by offering requested customer values that the industry has not really met so far.

50%

want information about safety features already when booking a coach ticket



Choosing a coach company – safety features and wi-fi are in demand

The first step of a journey is booking the ticket. And already here, there are things that coach companies could do to stand out over the competition. For example, 50% of passengers in our survey say they want information about safety features already when booking a coach ticket. This indicates that if more safety information becomes available to the passengers, the level of safety could become an important factor when choosing which company, or even which vehicle, to travel with.

Swedes are less interested than other nationalities, in the coach brand (4%), anti-viral filters (25%) and safety features (38%). This could of course be due to the safety level in Swedish coaches already being considered very high, and therefore not as much of an issue for passengers. So, what are Swedish passengers interested in getting information about when booking a coach ticket? The answer is wi-fi (60%) and the AC system (54%).

Germans are exceptionally interested in interior design and materials (27%), while passengers in Australia and Mexico want information about anti-virus filters (48% and 47%).

In Brazil and Mexico, safety is an important issue. 61% and 68% respectively would like information already when booking concerning which measures the coach company has taken to ensure safety.

When booking a coach ticket, what would you be interested in getting information about?

	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Safety features	50%	41%	38%	43%	46%	51%	55%	61%	48%	68%
Wi-Fi and charging solutions	42%	37%	60%	41%	46%	42%	41%	37%	34%	42%
The AC system	38%	22%	54%	31%	47%	44%	40%	39%	29%	35%
Cleanliness and anti-viral filters	37%	40%	25%	25%	42%	39%	39%	33%	48%	47%
Environmental impact	20%	20%	27%	21%	17%	22%	21%	16%	16%	21%
The coach brand	18%	19%	4%	11%	14%	10%	11%	51%	23%	16%
Interior design and materials used	17%	15%	11%	17%	27%	11%	20%	13%	18%	22%
None of the above	10%	18%	15%	12%	10%	8%	9%	2%	15%	2%



Example of things that get more important with age:

Passenger age	18-29	70+
Cleanliness/virus filters	34%	44%
AC system	33%	43%
Safety features	41%	55%

Things that are more important to the younger generation:

Passenger age	18-29	70+
Wi-fi & charging	51%	27%
Interior design/materials	24%	15%

The right seat – does it matter?

The first thing you do when entering the coach is to try to find the best seat possible. When we asked passengers in 2018 to show us what seat they preferred, the conclusion was that the majority preferred single seats, seats with no one in front or behind, and seats by the window. But this year we decided to dig a little deeper and ask what exactly it is that they are looking for when choosing a seat. As it turns out, legroom and a good view are more often the reason behind their choice of seat than the need for privacy.

50%

say legroom is the most important factor when choosing a seat on a coach



A window-seat with great legroom, please!

Legroom and a good view are the two most important factors when choosing a seat on a coach. Many people also prefer a seat in the direction of travel, although passengers in Brazil and Mexico don't seem to mind sitting in the opposite direction. Only 8% and 11% respectively say they look for a seat

in the direction of travel. Instead, privacy is more important in Brazil and Mexico, with 32% and 34% listing this as a major parameter. Privacy is also more important for younger passengers. 35% of 18 to 29-year-olds in all countries say they look for privacy when choosing their seat, compared to only 8% of passengers 70+ years.

What do you look for when choosing a seat?

	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Legroom	50%	50%	38%	50%	48%	53%	57%	50%	52%	48%
Good view/window	44%	45%	46%	39%	42%	38%	43%	49%	48%	46%
Seat in the direction of travel (to avoid nausea)	23%	25%	30%	28%	25%	23%	29%	8%	27%	11%
Privacy	22%	15%	29%	19%	17%	17%	18%	32%	17%	34%
Power outlet	16%	14%	17%	19%	16%	22%	13%	14%	12%	15%
Nice people in the seats nearby	12%	12%	9%	14%	14%	15%	10%	10%	12%	12%
Seat close to exit door	6%	4%	4%	2%	7%	6%	6%	8%	5%	8%
Seat close to toilet	4%	6%	3%	4%	7%	2%	2%	4%	5%	5%
Seat close to the driver	2%	2%	2%	3%	2%	3%	3%	3%	2%	3%
None of the above	2%	4%	2%	1%	3%	2%	1%	1%	2%	1%

Passengers were asked to select 1–3 aspects.



This year **72%** say they use the seat belt, to be compared with 66% in our last coach survey in 2018

Buckle up – seat belt usage is increasing

Looking at the survey results, seat belt use in coaches is now quite high. This year 72% in our survey say they use the seat belt, to be compared with 66% in our last coach survey in 2018. However, at Volvo Buses we are not satisfied until we reach 100% seat belt use and 3-point seat belts in all seats.



When riding a coach,
do you usually use the seat belt?

	2018	2022
Total	66%	72%
Sweden	83%	81%
Spain	73%	80%
Mexico	–	79%
Australia	–	76%
Brazil	–	76%
France	76%	76%
UK	71%	69%
Germany	62%	65%
Italy	32%	43%

Italian passengers are still worst in class – although increasing the most – regarding seat belt use when riding in a coach. Sweden, where seat belt use in buses has been a legal requirement since 1999, is still number one on the list, with the highest percentage of seat belt users.

Services onboard – the willingness to pay extra has increased

Offering the right services onboard is a great way of edging out ahead of the competition and could even provide additional earnings to the company. And willingness to pay extra has increased since our last survey in 2018. Back then 69% of passengers said they were willing to pay extra for one or more services, and in 2022 this number is now 75%.

The target group most willing to pay extra for services onboard is 18 to 29-year-olds. 90% of them are open to paying extra for one or more services onboard. The service they are most interested in is faster wi-fi. 37% of 18 to 29-year-olds and 28% of 30 to 39-year-olds are interested in paying extra for this service.

The services that are most in demand in general are faster wi-fi, live travel information and increased security onboard. But if we add the requirement that you also have to pay extra for the services, the top 3 is instead increased security onboard, fast wi-fi and increased physical privacy. Looking at national differences, Brazilians are the most positive to paying extra for services (92%), while the Britons are least eager to open their wallets (62%).

Passengers willing to pay extra for services onboard

2018: 69%

2022: 75%



The services that passengers would be interested in

Wi-fi fast enough for video- and music-streaming	44%
Travel information with estimated arrival time, map and GPS location	42%
Increased security onboard	41%
Sightseeing information about sites and attractions that you pass	38%
Entertainment system with movies, TV series, music and games	37%
Increased physical privacy	34%
Health kit with hand sanitizer, face mask and tissues	31%
Travel kit with blanket, neck-cushion, earplugs and sleeping mask	30%
Luggage surveillance	26%
CO ₂ compensation	16%
Driver information/passenger rating (similar to an Uber score)	16%
None of these services	4%

The services that passengers are willing to pay extra for

None of these services	25%
Increased security onboard	20%
Wi-fi fast enough for video- and music-streaming	20%
Increased physical privacy	18%
Entertainment system with movies, TV series, music and games	15%
Travel kit with blanket, neck-cushion earplugs and sleeping mask	14%
Health kit with hand sanitizer, face mask and tissues	10%
Luggage surveillance	10%
Sightseeing information about sites and attractions that you pass	9%
Travel information with estimated arrival time, map and GPS location	8%
CO ₂ compensation	8%
Driver information/passenger rating (similar to an Uber score)	4%

Britons, Australians, Swedes and the French are not overly interested in increased safety onboard (**18, 24, 25 and 27%**) but it is an important issue in Brazil and Mexico (**75% and 63%**).

French passengers are most interested in increased privacy (**53%**) while the Britons are the least interested (**23%**).

Swedes have the highest interest in CO₂ compensation (**25%**) while Britons are the least interested (**10%**).

The target group most willing to pay extra for services onboard is 18 to 29-year-olds. **90%** of them are open to paying extra for one or more services onboard.



Time for a snack?

When travelling by plane or train, having a drink or something to eat is often considered to be the best part of the journey. However, when travelling by coach it is still unusual to be able to buy beverages or food onboard. We all understand that doing so would require additional space and staff, however as many as 61% of passengers say they would like to be able to buy cold beverages, and 40–43% would like snacks and a hot coffee. Could this be an untapped potential that may put a coach company ahead of the competition when it comes to preference and choice?

Younger passengers (18–39 years) are the most interested in buying snacks (55%) and hot meals (25%), while older passengers (60+) are the most interested in hot beverages (45%).

15% of Brazilian passengers would like to be able to buy a three-course meal on the coach. While only **5%** of Italians and **2%** of Swedes have the same wish.

18% of Swedish passengers would like to be able to buy alcoholic beverages onboard. But only **4%** of Italians agree.

What would you like to be able to buy onboard?

	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Cold beverages	61%	53%	72%	60%	69%	52%	60%	58%	52%	72%
Snacks	43%	51%	42%	24%	47%	38%	36%	63%	50%	35%
Hot beverages	40%	45%	41%	41%	46%	40%	37%	29%	38%	44%
Sandwiches	39%	37%	51%	37%	31%	28%	34%	40%	39%	54%
Hot meals	18%	16%	7%	15%	20%	15%	14%	29%	25%	20%
Alcoholic beverages	12%	16%	18%	6%	14%	4%	7%	13%	17%	13%
Three-course dinner	8%	7%	2%	10%	6%	5%	9%	10%	10%	15%
None of the above	16%	17%	16%	19%	11%	20%	21%	11%	20%	7%

Sit back and relax?

Even though many people like to socialize and work during a coach ride, sleeping is still the most popular activity among coach passengers. Overall, passengers seem to prefer calm activities like reading and watching films. And in Brazil as many as 24% say they like to meditate during the ride. With sleep being the most popular activity on a coach, what could coach companies do to help passengers fall asleep? Recliner seats, blankets and earplugs or offering a quiet section at the back?

The top three things that passengers like to do on a coach haven't changed since our last survey in 2018. It is still sleep, read and watch films. However, reading has diminished somewhat in favour of watching movies. It's a development that is likely to continue in the future, as new generations read less and less.



Mark the things that you like to do on a coach

	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Sleep	63%	52%	65%	61%	56%	57%	65%	75%	64%	74%
Read	51%	48%	58%	45%	47%	54%	54%	45%	54%	50%
Watch films	50%	38%	41%	49%	36%	48%	62%	55%	51%	73%
Sit facing forward	44%	54%	57%	48%	56%	28%	43%	30%	57%	24%
Eat	35%	36%	30%	25%	33%	24%	32%	42%	43%	48%
Socialize	30%	23%	30%	37%	52%	35%	24%	26%	25%	22%
Work	15%	11%	19%	14%	11%	18%	20%	8%	13%	23%
Meditate	14%	7%	11%	17%	7%	13%	16%	24%	11%	21%
Take off your shoes	11%	8%	21%	8%	9%	6%	7%	18%	14%	10%
Make out/kiss	6%	4%	6%	6%	5%	6%	7%	14%	5%	6%
Work out	2%	2%	1%	3%	3%	2%	4%	1%	3%	4%
Put on makeup	2%	2%	1%	1%	2%	2%	2%	1%	3%	6%
Sit facing backward	2%	2%	2%	2%	2%	2%	2%	2%	3%	2%
None of the above	2%	4%	2%	2%	2%	3%	2%	1%	2%	1%

48% of Mexican passengers enjoy eating on the coach.

Germans are the most social nationality, with **52%** saying they like to socialize on the coach ride.

Only **6%** overall say they like to kiss on the bus. However, passengers in the UK and Australia are the most negative to kissing on the bus. **65** and **69%** of them say they would never do it.

Passengers seem to get more annoyed with age

So, is there anything that could disturb passengers while they are relaxing in their seats and enjoying the ride? We asked what people find especially annoying and learned that noisy passengers and seat kickers are at the top of the list. We also noticed that passengers seem to get more annoyed with age. The 70+ age group is the most annoyed one, no matter the cause. They rate highest on all the items in our list.

Italians are generally less annoyed than other passengers. Only **22%** of them are bothered by pets, only **26%** by smelly foods and **27%** by people drinking alcohol.

In Brazil, it's ok to lean back your chair! Only **11%** say they get annoyed with seat recliners.

Mark the things that you would find annoying on a coach

	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Noisy passengers	76%	78%	80%	76%	74%	72%	76%	81%	79%	70%
Seat kickers	68%	69%	86%	64%	62%	54%	69%	75%	70%	68%
Smelly foods	54%	56%	65%	45%	50%	26%	62%	64%	59%	58%
Undressers (removing shoes, socks or more)	44%	38%	31%	40%	46%	53%	59%	31%	46%	52%
Drinking alcohol	42%	38%	42%	42%	42%	27%	47%	45%	42%	51%
Pets	35%	40%	28%	31%	38%	22%	35%	34%	47%	44%
Seat recliners	35%	35%	39%	37%	43%	41%	43%	11%	36%	30%
None of the above	2%	3%	1%	2%	2%	2%	2%	1%	2%	1%

Intercity travel vs tourist trips

Although the vehicles are similar, we know that passengers' situation differ between intercity and tourist travel. An educated guess is that needs and expectations are connected to the purpose of each category of travel. Therefore, we divided some questions in two, making it possible to compare coach tourists' preferences to that of intercity passengers. However, the results show that passenger preferences are quite similar, whether the trip is intercity or tourist, domestic or international.



Inexpensive, convenient and comfortable – why we travel by coach

The main reasons why passengers choose to travel by coach are the same for both intercity and tourist trips. However, we can see some differences between countries and age groups.

Convenience more important with age

The main selling point for younger passengers (18–29 years) is that travelling by coach is inexpensive (Intercity: 41% and Tourist 38%). But the main argument for older passengers (70+ years) is that travelling by coach is convenient, with coach stops close to places and sights (Intercity: 23% and Tourist 37%).

What is the main reason why you would choose to travel by coach?

Intercity		Tourism	
Inexpensive	35%	Inexpensive	28%
Comfortable	16%	Convenient, coach stops close to places and sights	26%
Convenient, (more door-to-door travel than e.g. air travel)	15%	Comfortable	14%
Other means of transportation not available	10%	Safe and secure	9%
Safety	8%	Other means of transportation not available	7%
Fast	5%	Social / you meet people	6%
Environmentally friendly	5%	Environmentally friendly	4%
Possibility to stay online during the whole trip	3%	None of the above	3%
None of the above	3%	Possibility to stay online during the whole trip	3%

28%

name inexpensive as
main reason to choose
coach for tourist travel



Intercity – different arguments for different countries

45% of French and 47% of Brazilian passengers say they choose coach for intercity travel mainly because it is inexpensive. To be compared with only 20% in Mexico. Safety is an important argument in Brazil and Mexico. Here 13% (Brazil) and 21% (Mexico) say it is the main reason for choosing the coach. To be compared with only 1% in Sweden.

Comfort and safety – why Mexicans travel by coach

Mexican passengers stand out when it comes to why they choose the coach over other means of transportation. They rank comfort much higher than other nationalities do (Intercity: 27% and Tourist 22%) while inexpensive isn't as much of a reason for them to choose coach (Intercity: 20% and Tourist 15%). They also choose the coach to a higher degree for safety (Intercity: 21% and Tourist 18%).

However, it's worth pointing out that Mexican passengers perhaps have fewer alternatives than passengers from the other countries in this survey. Buses and planes are the only way for long-distance passengers to get around Mexico, besides a couple of very minor train services that exist in certain areas.



What has the biggest impact on making it a good coach ride for you?

Intercity		Tourism	
Safety	50%	Safety	46%
Legroom	42%	Interior climate (temperature and air quality)	37%
Interior climate (temperature and air quality)	40%	Legroom	37%
The seat	38%	The seat	33%
Cleanliness and anti-viral filters	28%	Visibility and the view	25%
Wi-fi and charging solutions	25%	Cleanliness and anti-viral filters	24%
Visibility and the view	19%	Wi-fi and charging solutions	21%
The driver	18%	Your fellow passengers	19%
Space for personal belongings	14%	The driver	18%
Your fellow passengers	13%	Space for personal belongings	14%
None of the above	1%	None of the above	2%

Passengers were asked to select 1–3 aspects.

In first place, above anything else, passengers **choose safety**

Safety even more important than comfort

If we were to focus on only one or two factors to improve the passenger experience, what would they be? To find out what has the strongest impact on making it a good coach ride, we gave passengers a list of options and asked them to mark the three most important factors. At the top of the list, we find legroom, interior climate and the seat. Not that

surprisingly since they are all crucial in making long-distance rides comfortable. But in first place, above everything else, we find safety.

Last time we did the coach survey, in 2018, “Legroom” and “The seat” made it to the top of the list. This year (2022) we included “Safety” among the possible answers, which resulted in a new “number 1”.



Things that become more important with age*

Passenger age	18–29	70+
The driver	13%	23%
Visibility/view	14%	26%
Legroom	31%	51%

Things that are more important for the younger generation*

Passenger age	18–29	70+
Wi-fi & charging	38%	10%
Space for personal belongings	22%	11%

* The numbers shown are for intercity trips. When looking at the same question for tourist trips, we see the same relation between age and priorities, although not with the exact same percentage.

Legroom – not as important in Mexico and Brazil

Here are a few countries whose results stand out compared to the other nationalities:

- In Mexico passengers are not as interested in their fellow passengers. Only **6%** (Intercity) and **8%** (Tourist) chose “Your fellow passengers” as an important parameter for making it a good coach ride.
- In Mexico and Brazil, passengers don’t regard legroom being as important as others do. Only **29–33%** (Brazil) and **24–29%** (Mexico) list it as having an impact on making it a good coach ride. To be compared to **44–47%** in Germany.
- In Sweden and France passengers don’t seem to be concerned with cleanliness and antiviral measures. Only **13–14%** (Sweden) and **13–16%** (France) list it in their top three of what has an impact on making it a good coach ride. To be compared to **34–38%** in Mexico.
- Safety is a big priority in Brazil and Mexico. **60–68%** say it is important for a good coach ride. Compared to only **34–35%** in the UK and Sweden.



Which of the following coach trips are you planning to take in the next 12 months?

	Total	UK	Sweden	France	Germany	Italy	Spain	Brazil	Australia	Mexico
Domestic intercity trip (travel between two cities)	67%	67%	73%	65%	50%	71%	73%	68%	63%	73%
Domestic tourism (coach tour for a group of holidaymakers)	35%	34%	16%	30%	41%	45%	38%	34%	35%	37%
International intercity trip (travel between two cities)	17%	12%	10%	23%	22%	18%	16%	22%	15%	12%
International tourism (coach tour for a group of holidaymakers)	11%	9%	15%	12%	22%	13%	8%	10%	11%	4%
Other	2%	3%	2%	2%	1%	1%	1%	2%	2%	1%

Young adults travel intercity

The youngest passengers in the survey (18–29 years) are the biggest target group when it comes to planning domestic intercity trips. 81% of them are planning one within the year. Middle-aged passengers (30–49 years) show the highest interest when it comes to international intercity trips (22%). And passengers 70+ years form the biggest target group when it comes to tourist trips, both domestic (40%) and international (16%).

Domestic tourist trips big in Italy. Germans go abroad.

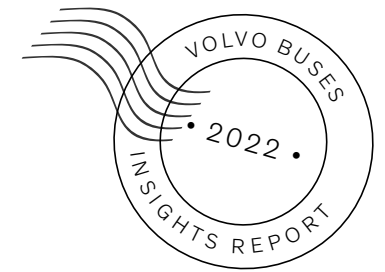
Italians are the passengers most interested in domestic tourist trips, with 45% planning one in 2022, while only 16% of Swedish passengers are planning a domestic tourist trip by coach in the coming year. When it comes to international tourist travel, Germans are the most positive with 22% planning to go this year, while Mexicans are a bit more hesitant with only 4%.

22% of Germans plan to travel abroad by coach the coming year

Chapter 2: The driver

Coach drivers rate connectivity and safety as a top priority

800 drivers took part in the survey, from Europe, Australia and South America.



Occupation: coach driver

In the passenger survey we found that safety and comfort play a big role in creating a positive passenger experience. But what makes the coach ride a good experience for the driver? Which factors are vital for making a coach driver happy and satisfied on the job?

The driving itself is the best part of the job

Everybody wants to feel appreciated at work. That goes for coach drivers too. And since their daily feedback comes largely from the passengers, it's not surprising that "Meeting passengers" is regarded as one of the best parts of the job. However, what they enjoy most is the driving itself.



What is the best part of your job?

Driver age	Total	18–29	30–45	46–59	60+
Driving	31%	24%	32%	32%	26%
Meeting passengers	23%	13%	17%	22%	38%
Seeing beautiful nature and places	16%	25%	16%	17%	13%
Challenging, exciting roads	16%	13%	17%	16%	16%
Experiencing new places	14%	25%	18%	13%	7%

When we compare drivers' ages combined with what part of the job they enjoy the most, we can see notable differences. Older drivers enjoy meeting passengers more, while the younger drivers enjoy experiencing new and beautiful places. Perhaps not strange when you are new at work and experiencing everything for the first time.

Older drivers enjoy meeting
passengers, while younger
drivers enjoy experiencing new
and beautiful places



Charter drivers still get applause

As many of us recognize, the work culture and the atmosphere in the workplace are crucial to feeling good at work. According to the survey the atmosphere onboard seems to be friendly. The majority of coach drivers, 61%, say they rarely or never encounter angry or unpleasant passengers. And 74% of coach drivers say they get spontaneous applause from passengers often, or at least now and then. A vast majority of the drivers who receive applause are not surprisingly driving charter tours.

Drivers 46–60+ years encounter much fewer unpleasant passengers than younger drivers do. Perhaps passengers are more well behaved around older drivers, or is it a change in perspective from the driver's side – becoming more relaxed and unbothered with every year that goes by?



How often do you meet angry or unpleasant passengers?

Year	2018	2022
Often	8%	8%
Now and then	29%	31%
Rarely	53%	51%
Never	10%	10%

Meeting angry or unpleasant passengers? Divided by driver age

Driver age	18–29	30–45	46–59	60+
Often/Now and then	56%	51%	35%	24%
Rarely/ Never	44%	49%	65%	76%

How often do you get spontaneous applause?

Now and then	42%
Often	32%
Rarely	17%
Never	9%

Coach drivers rate connectivity and safety as a top priority

A coach driver spends thousands of hours behind the steering wheel every year, so we asked what kinds of features and services are most important to them in their everyday work. At place 2 and 3 on the list we find Safety support systems and Handling/maneuverability, which was placed 1 and 2 on the list when we asked the same question in 2018. But this year we added a new option, which came out on the very top of the drivers' priority list: Connectivity and ease of connecting your smart-phone and other devices.



As a coach driver, what is most important to you?

1. Ease of connecting your smart-phone and other devices
2. Driver safety support systems
3. Handling and manoeuvrability
4. Configure information in displays
5. Load capacity for your personal belongings and luggage
6. Fuel efficiency
7. Engine power
8. Driver partition glass/wall for COVID protection
9. Multimedia system
10. Visibility
11. Comfortable driver environment

Recruiting drivers

The COVID-19 pandemic has impacted the transport and travel industry. Perhaps the most visible effect was the variety of global restrictions that greatly reduced demand. Now the industry has started its recovery and coach companies are trying to navigate forward and understand which employer values will help them keep and attract drivers as demand steadily rises again.



22% considered a change of career during the pandemic

65% of drivers say they have been worrying about the risk of being infected with COVID-19 at work, and 32% have been afraid of losing their jobs during the last couple of years. But perhaps the most conspicuous figure of all is that 22% even considered a complete change of career. The survey result doesn't point out any one specific country or region as more afflicted than others. The drivers who say they lost

their job or considered changing career come from many different countries, including Australia, Brazil, Germany, Italy, Norway, Spain and Sweden, to name just a few.

84% still recommend being a coach driver

Even though the industry has had a tough couple of years, the majority of coach drivers, 84%, are still so happy with their jobs that they would recommend others to join the profession.

In light of the pandemic, have you done any of the following?

	Total	18-29	30-45	46-59	60+
Been concerned about the risk of being infected at work	65%	61%	55%	65%	74%
Been afraid of losing your job	32%	49%	43%	25%	22%
Considered changing career	22%	22%	30%	19%	13%
Considered changing company/employer	10%	10%	12%	8%	10%
Changed career	8%	12%	9%	6%	7%
Changed company/employer	7%	15%	9%	5%	5%
Lost your job	6%	7%	6%	7%	3%

Would you recommend others to become a coach driver?

	2018	2022
YES	85%	84%
NO	15%	16%



84%

recommend being
a coach driver

How do drivers choose employers?

A good coach driver is highly attractive in the coach business. In many countries drivers can pick and choose between offers from different employers. So, what can a coach operator do to win over the competition and attract and keep drivers in the long run? A competitive salary is key when choosing an employer, after that the most important factor for a driver when choosing employer is the coach they get to drive along with a firm focus on safety onboard. There is clearly a strong bond between the driver and the vehicle.



Most important when choosing your employer?

	2018	2022
The salary	–	53%
Safety onboard being a priority	–	40%
The bus/coach I get to drive	58%	39%
Flexible work schedule	46%	38%
Training and education	30%	35%
The co-workers	34%	32%
The manager	36%	27%
Where (geographically) I get to drive	35%	24%
The length of the routes I get to drive	22%	12%

The drivers were asked to select the three aspects they thought were most important.

40%

think safety onboard is a priority when choosing employer. That's the second most important factor.

In Sweden and Australia, the salary is not a top priority for drivers

When breaking down the result and looking at drivers in different countries, we find that what is most important differs. In Sweden and Australia, the salary is not even at the top of the list. Instead, they prioritize the coach they get to drive as well as a flexible work schedule. And in Brazil, the most important motivation when choosing employer is the scope for improving as a driver through training and education.

In Brazil the most important motivation when choosing employer is the scope for improving as a driver.

Most important when choosing your employer? Example of how it differs between countries

	Total	Sweden	Norway	Germany	Italy	Spain	Brazil	Australia
The salary	53%	26%	51%	61%	54%	60%	55%	37%
Safety onboard being a priority	40%	38%	38%	40%	54%	35%	53%	43%
The bus/coach I get to drive	39%	45%	35%	30%	46%	32%	42%	47%
Flexible work schedule	38%	43%	45%	26%	36%	49%	42%	45%
Scope for improving as a driver through training and education	35%	28%	25%	31%	36%	42%	67%	37%
The co-workers	32%	43%	49%	36%	9%	29%	7%	35%
The manager	27%	43%	14%	38%	25%	19%	12%	29%
Where (geographically) I get to drive	24%	21%	32%	29%	30%	17%	3%	27%
The length of the routes I get to drive	12%	15%	13%	9%	11%	17%	20%	2%

The drivers were asked to select the three aspects they thought were most important.

Safety on the rise

Modern coaches are becoming increasingly advanced. Drivers are supported by sophisticated systems that can sometimes even override the driver to maintain safety and comfort in a critical situation. The introduction of new systems means a constant need for training and education. In the survey it's clear that drivers feel a need for getting more information about driver support systems and features. And interest in safety has gone up noticeably since 2018.



What drivers want more information and knowledge about

	2018	2022
Driver support systems	52%	54%
Safety features	40%	46%
Safety driving training	34%	43%
How to run utilities (kitchen, toilet, infotainment system etc.)	38%	36%
Eco-driving training	27%	31%
Service – taking care of passengers	22%	20%

43%

are interested in safety driving training, compared to 34% in 2018.

Best and worst according to drivers

We really wanted to understand the drivers and get their point of view – which countries offer the best service, what is their favourite kind of passenger, and which fellow road users are most difficult to handle? Here is the result, the coach drivers' own top lists.

More drivers struggle with cold weather than heat

Not just drivers in Brazil or Australia experience heat. Just as many European drivers and even drivers from Scandinavia are among the 50% of drivers who say

they struggle with heat. Cold weather, however, is even more common, with 66% of drivers experiencing it in their work. Cold is predominantly, but not exclusively, a problem for European drivers. Sand storms luckily seem to be quite unusual, although a few German charter drivers in our survey do have to face them.

Coach drivers enjoy scenic routes

As seen in the chart below, many drivers meet challenging conditions in the form of hilly and winding roads. But perhaps this is a challenge that many

drivers welcome. Maybe that's why Norway comes out on top among the countries that coach drivers most enjoy driving in. Even though most drivers tended to vote for their own countries, the votes for Norway came from drivers all over Europe, South America and Australia.

Which challenging driving conditions do you meet in your work?

Small, narrow city roads	72%
Cold weather, snow and icy roads	66%
Hilly, steep roads	53%
Strong winds	52%
Winding roads	51%
Heat	50%
Sand storms	4%

On this question it was possible to give more than one answer.





The countries that drivers
most enjoy driving in

Norway	17%
Germany	12%
Italy	11%



Reckless drivers are a challenge

For drivers a typical workday means dealing with other road users. Most drivers have no problem with pedestrians or road construction workers, but cyclists and especially reckless drivers are considered challenging.

Most challenging to meet on the road, according to the drivers' experience

Reckless drivers	55%
Cyclists	29%
Road construction/works	11%
Pedestrians	5%



The drivers' favourite countries

In 2018, Germany “won” all categories as the drivers' favourite country. And we can see that drivers still rate this country very high. It takes second place in the list of the best countries to drive in, only Norway rates higher. And Germany is still number one when it comes to the country offering the best service to coach drivers.

In which country do you get the best service as a coach driver?

2018	Germany
2022	Germany

Conclusion



Travel by coach is still great – 65% are planning coach journey within a year

Coach journeys are still very popular with both passengers and drivers. Demand is rising and is estimated to reach pre-pandemic levels in about a year or so. That is perhaps the most important takeaway from our passenger survey. Based on the answers from over 9,000 passengers and 800 drivers across the globe we have several insights to share with you. These are our most noteworthy findings:

Passenger survey

- Demand for travel by coach is coming back, 65% plan for travel the next 12 months
- There is increasing willingness to pay extra for add-on services (75%)
- The pandemic has resulted in extra demand for hygiene and safety

Driver survey

- Coach drivers rate safety and reliable wi-fi for smart-phones as top priorities
- A competitive salary and flexible work schedule are key factors to retain and attract drivers
- Coach drivers still highly recommend their profession to others

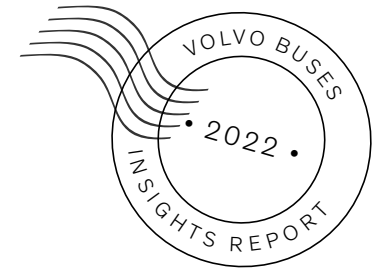
Trending topics

This coach insights report is Volvo Buses' second, we issued the first in 2018. The major differences between 2018 and 2022 concern safety, connectivity, onboard services and requested information:

- We see an overall increased interest in getting more information and being able to make individual choices
- Passengers who want information about the vehicle and the services onboard already when booking their tickets have increased from 71% to 90%
- Passengers who want to be able to pay extra for services have increased from 69% to 75%
- We see an increased interest in wi-fi, connectivity and safety among both passengers and drivers
- The use of seat belts has increased from 64% to 72%



Sources





Coach Passenger Survey

- Markets:** Australia, Brazil, France, Germany, Italy, Mexico, Spain, Sweden, UK.
- Target group:** Men and women, 18+ years, who have travelled by coach (long-distance journeys, 1 hour or more) during the past five years.
- Target group:** 9,000 online interviews (1,000 per market). The survey was conducted during April–May 2022, together with Kantar (www.kantar.com).

Coach Driver Survey

- Markets:** Drivers from 23 different countries took part in the survey, from all over Europe, Australia and South America. The highest number of participating drivers came from Australia, Brazil, Germany, Italy, Spain, Sweden and Norway.
- Comparisons between different countries are however difficult to make, since the number of participating drivers differs greatly from country to country. And when taking it down to a specific country we would be left with too few answers to be able to draw any statistically reliable conclusions.
- Target group:** Coach drivers, 18+ years, who work with intercity and/or charter.
- Implementation:** 800 online interviews. The survey was conducted during May 2022.

The tables and figures in this report are derived from two different quantitative online surveys, one aimed at coach passengers and the other at coach drivers. The surveys were originally written in English and then translated into the different native languages. Therefore, slight variations may have arisen from the translations.

V O L V O