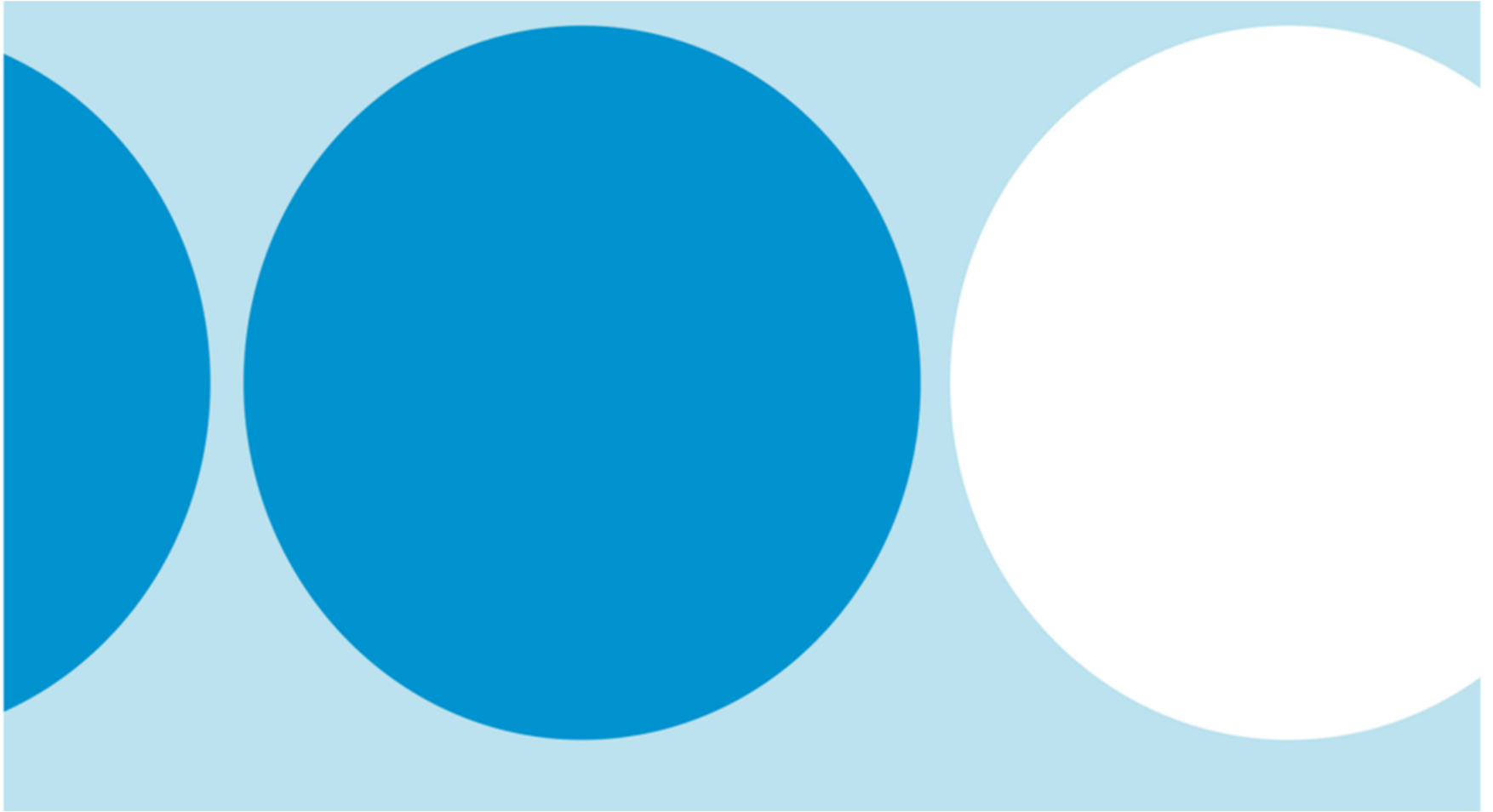


TfL New Bus for London – Route 24 Awareness August 2013

TNS job no. 117658



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Background

The New Bus for London (NBfL) was first introduced in February 2012, and in 2013 the bus is being rolled out to service entire routes. Route 24 was the first route to be fully converted to using the NBfL, with the new buses servicing the route from June 2013.

A marketing campaign was launched to support the introduction of the NBfL to Route 24, which ran from May to July 2013. The campaign sought to inform bus passengers that the NBfL had been introduced to the route, and explain the role of the conductor, the three entrances/ exits and ticketing requirements.

The campaign utilised poster ads and a leaflet, as well as stakeholder communications via text messaging and emails.

A key target group for the messaging was medium (2-4 times a week) to high frequency (5+ times a week) users of Route 24, and this research evaluates the impact of the campaign on those people.



1 Summary

Summary

The campaign achieved a wide reach among medium to high frequency Route 24 users, with three fifths (61 per cent) recognising at least one element of the campaign. The poster (53 per cent) and the leaflet (29 per cent) attained the highest levels of recognition.

Nearly all users (96 per cent) were aware that the NBfL had been introduced to the route, with a similar proportion aware that the buses have three entrances/exits and conductors on board. 'Ensuring passenger safety when boarding' was cited most frequently (85 per cent) as falling under the role of the conductor. However, a fifth (21 per cent) of those aware that there is a conductor incorrectly thought that collecting fares falls under the role. So it may be necessary to further stress this point if confusion over ticketing becomes an issue.

Pleasingly, 86 per cent of Route 24 users agreed that the NBfL is accessible and convenient, and 71 per cent agreed that the campaign successfully communicated this point – indicating that the accessibility benefits are understood.


The reputation of London Buses was well perceived among Route 24 users, with 79 per cent agreeing that 'bus services in London are really improving' and 84 per cent agreeing that 'TfL is investing to improve bus services'.

'Caring about customers' was not as strongly perceived from the campaign, nevertheless just under two thirds (62 per cent) of Route 24 users agreed that the ads demonstrated this.

Overall summary of Key Performance Indicators

KPI		July/August 2013 (%)	
Recognition & campaign awareness	Awareness of any advertising about the New Bus for London	Route 24 users	35
		Recognisers	49
		Non-recognisers	13
	Ad recognition	Route 24 users	61
Awareness of route 24	The New Bus for London has recently been introduced to route 24	Route 24 users	96
		Recognisers	98
		Non-recognisers	94
Attitudes	TfL is investing to improve bus services in London (<i>NET: agree</i>)	Route 24 users	84
		Recognisers	84
		Non-recognisers	83
	The New Bus for London is accessible and convenient (<i>NET: agree</i>)	Route 24 users	86
		Recognisers	85
		Non-recognisers	87
	The New Bus for London use green technology (<i>NET: agree</i>)	Route 24 users	71
		Recognisers	75
		Non-recognisers	67
	The New Bus for London is a new London icon (<i>NET: agree</i>)	Route 24 users	71
		Recognisers	75
		Non-recognisers	65
Bus services in London are really improving (<i>NET: agree</i>)	Route 24 users	79	
	Recognisers	78	
	Non-recognisers	81	

Base: Route 24 users (291), recognisers (177), non-recognisers (114)

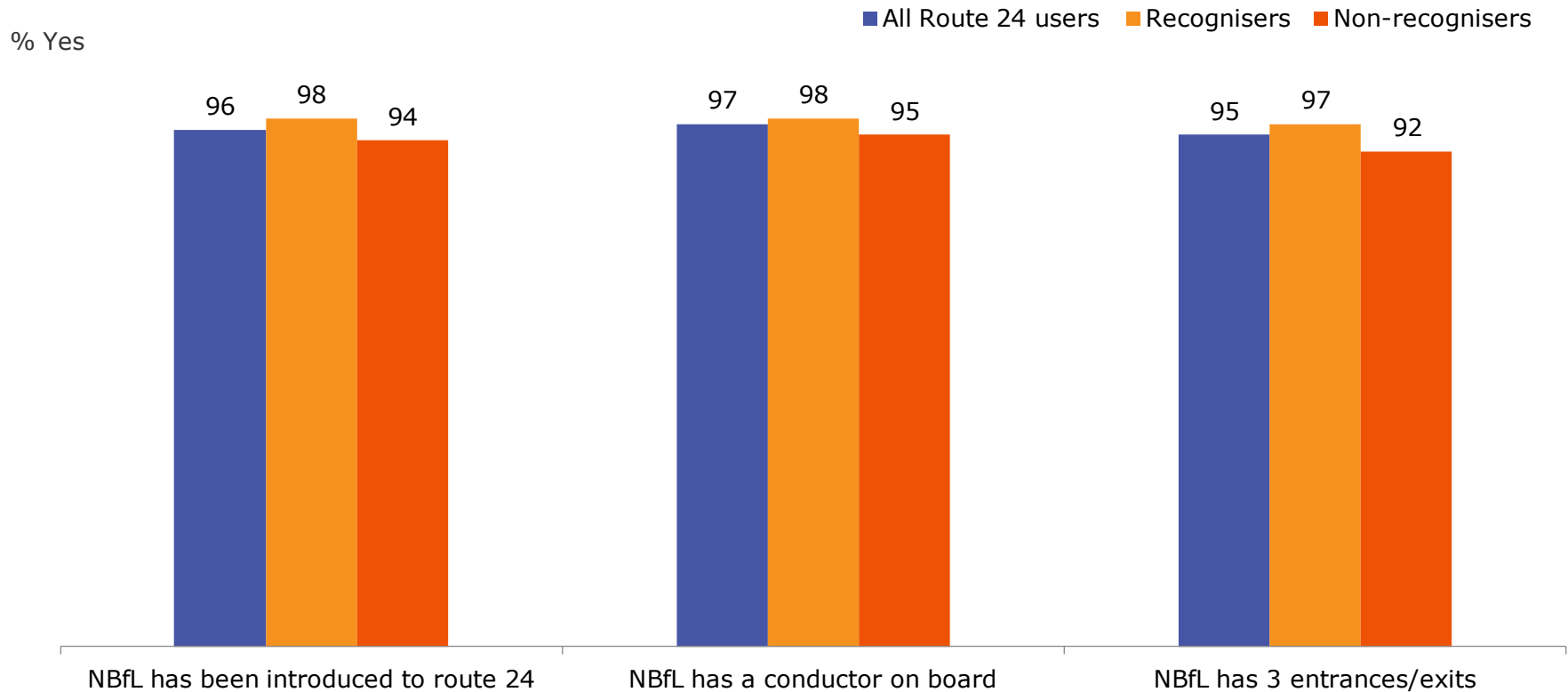
 Significant difference between recognisers and non-recognisers

2

Awareness and recognition

Stated awareness of New Bus for London

A very high proportion of Route 24 users said they were aware that the NBfL had been introduced to the route. Similarly, a very high proportion were aware that the new buses have a conductor on board and that they have three entrances / exits.

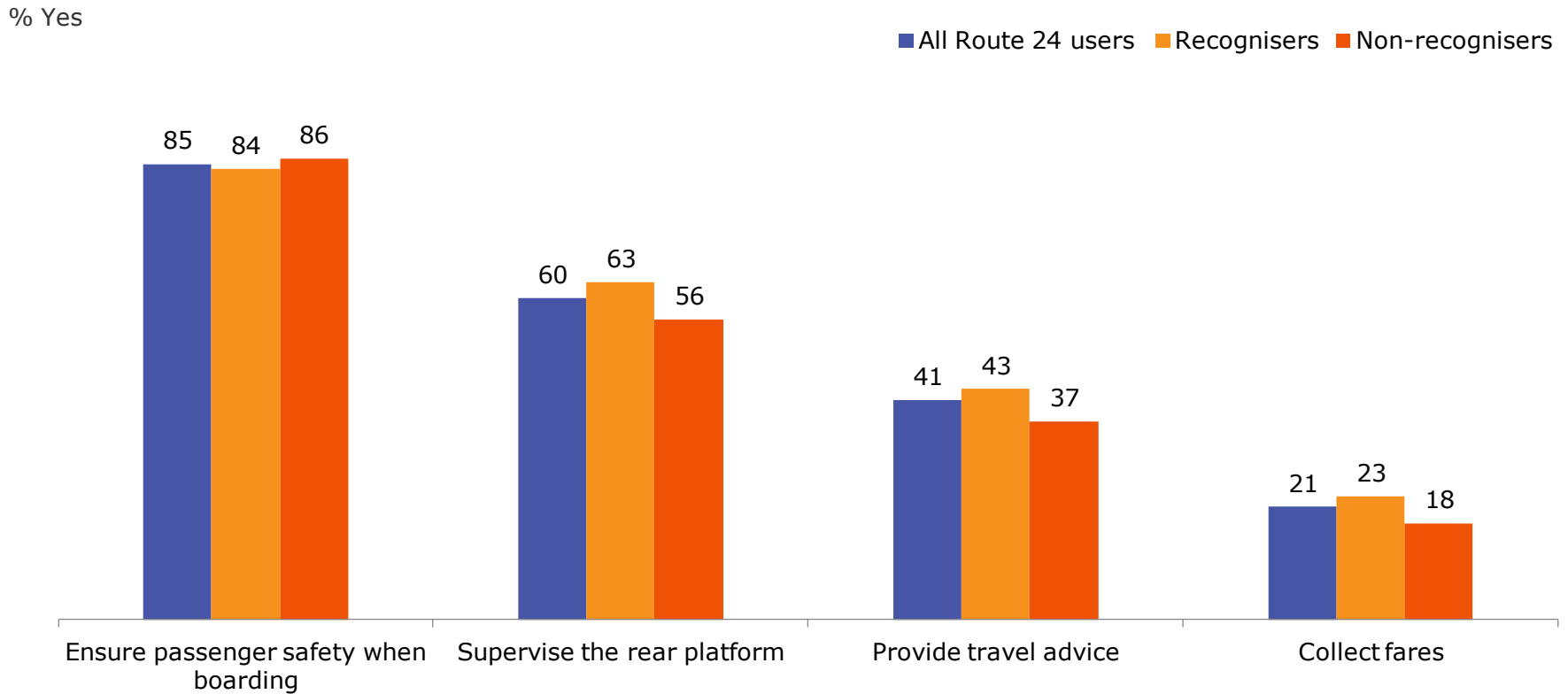


Q6. Before today, which of the following were you aware of?

Base: Route 24 users (291), recognisers (177), non-recognisers (114)

Understanding of the role of the conductor

Of those who were aware that the new buses have a conductor on board, pleasingly, 'ensuring passenger safety when boarding' was cited most frequently as falling under the role of the conductor. However, a fifth of those aware of the conductor incorrectly said that collecting fares falls under the role.



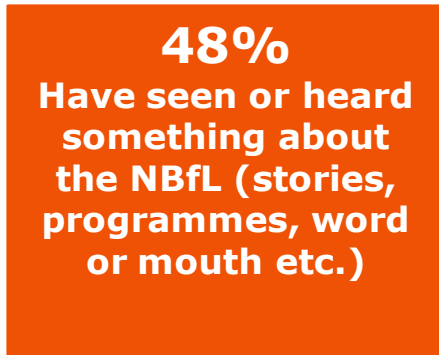
Q7. Which of the following tasks do you understand to fall under the role of the conductor on the New Bus for London?

Base: All aware that NBfL has a conductor (282), recognisers (174), non-recognisers (108)

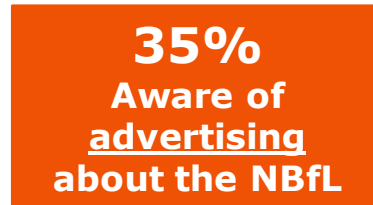
Advertising and other information awareness

Almost half of Route 24 users said they had seen or heard something about the NBfL in the past month. Just over a third claimed to recall some form of advertising, with posters and leaflets being mentioned most frequently when asked where they had seen / heard it. None of those aware of advertising listed 'text message' as the source of this.

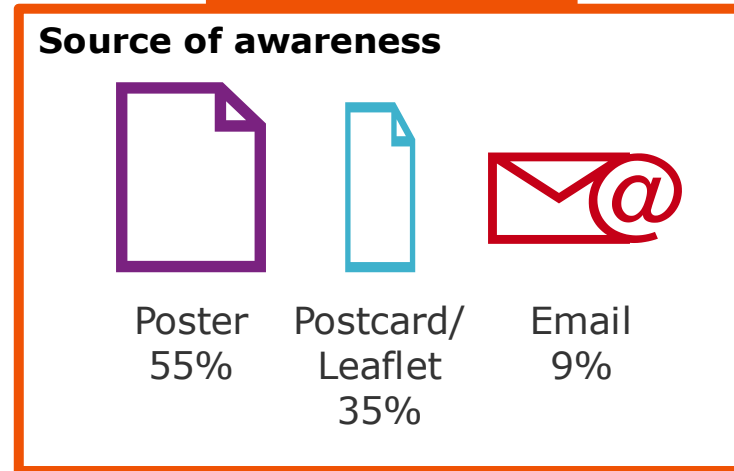
Q9



Q10



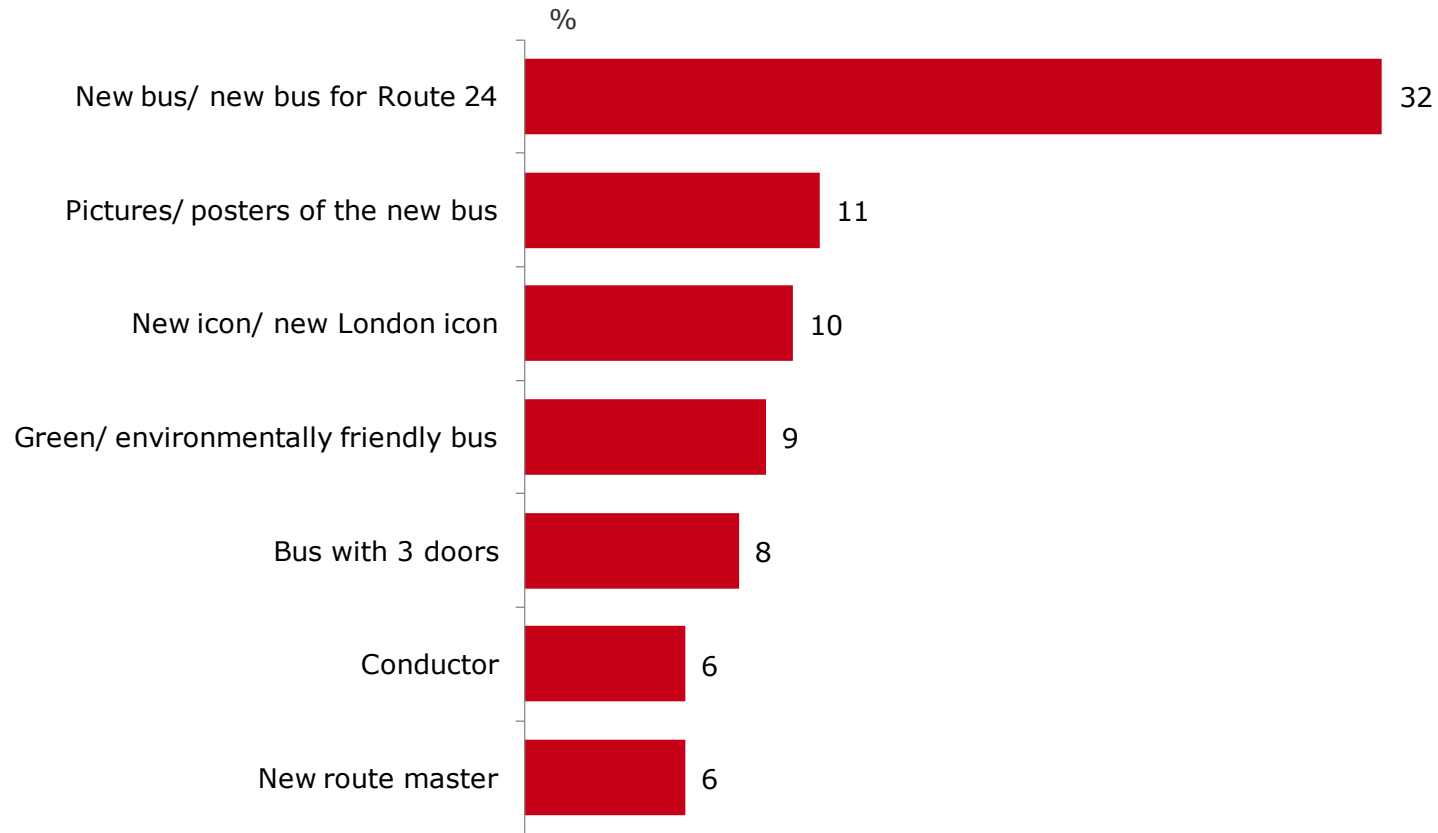
Q11



Q9. Have you seen or heard anything about [the New Bus for London](#) in the past month?
Q10. Have you seen or heard any advertising about [the New Bus for London](#) in the past month?
Q11. Where did you see or read these advertisements?
Base: Route 24 users (291); All who recall advertising (102)

Ad memories (open response)

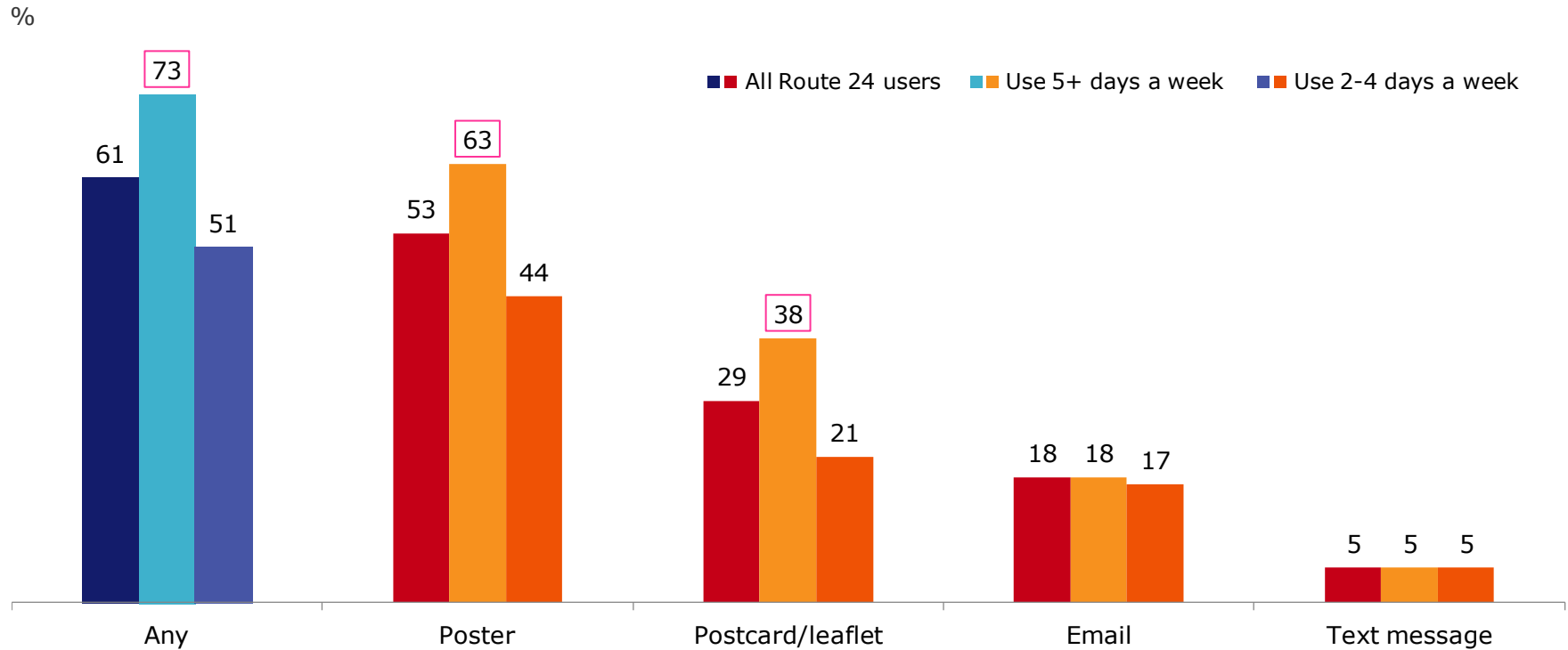
When asked what they could remember about the advertising they had seen, most respondents responded with mentions of the new bus itself. Features of the new bus were also mentioned, albeit to a lesser extent.



Q12. What can you remember about the advertising? What did it show or say?
Base: All who recall advertising (102)

Recognition

A good level of campaign recognition was achieved, with around three in five Route 24 users claiming to recognise at least one element of the campaign, with the poster getting the highest recognition, followed by the postcard/leaflet. The campaign was more recognisable to high frequency Route 24 users overall - due to their higher recognition of the poster and postcard/leaflet (whereas recognition of the email and text message was similar amongst the two frequency groups).



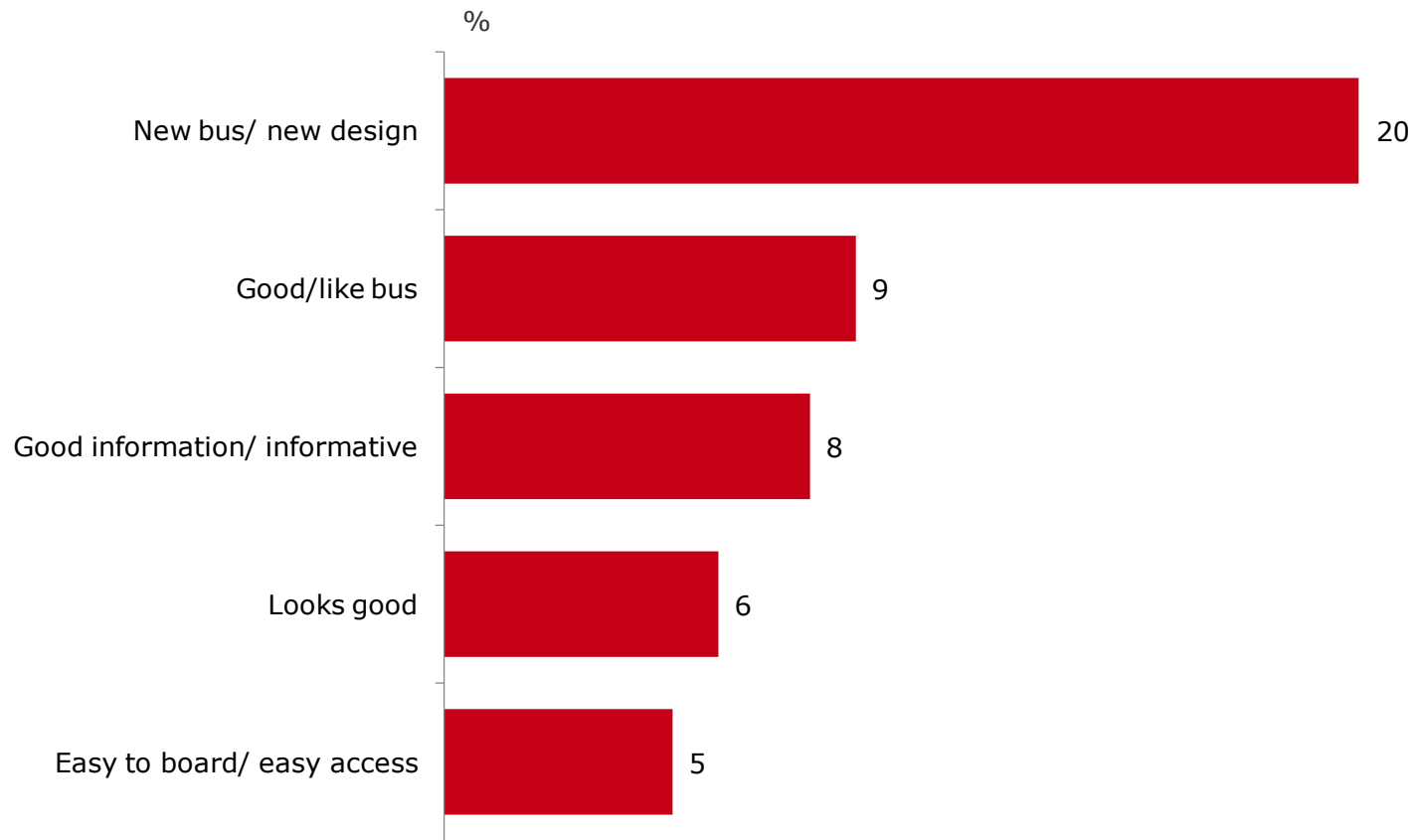
Q13. Have you seen any of these ads/ information before?

Base: Route 24 users (291), use 5+ days a week (131), use 2-4 days a week (160)

Significant difference between subgroups

Ad response (open response)

When asked what came to mind when thinking about the campaign they had just been shown, respondents mentioned the new bus/design the most, and that the information and ads were good.



Q14. Taking into consideration the information and advertising you've been shown. Please can you tell me everything that comes into your mind when you think about the information shown, all the thoughts, ideas, feelings and impressions that go through your mind.

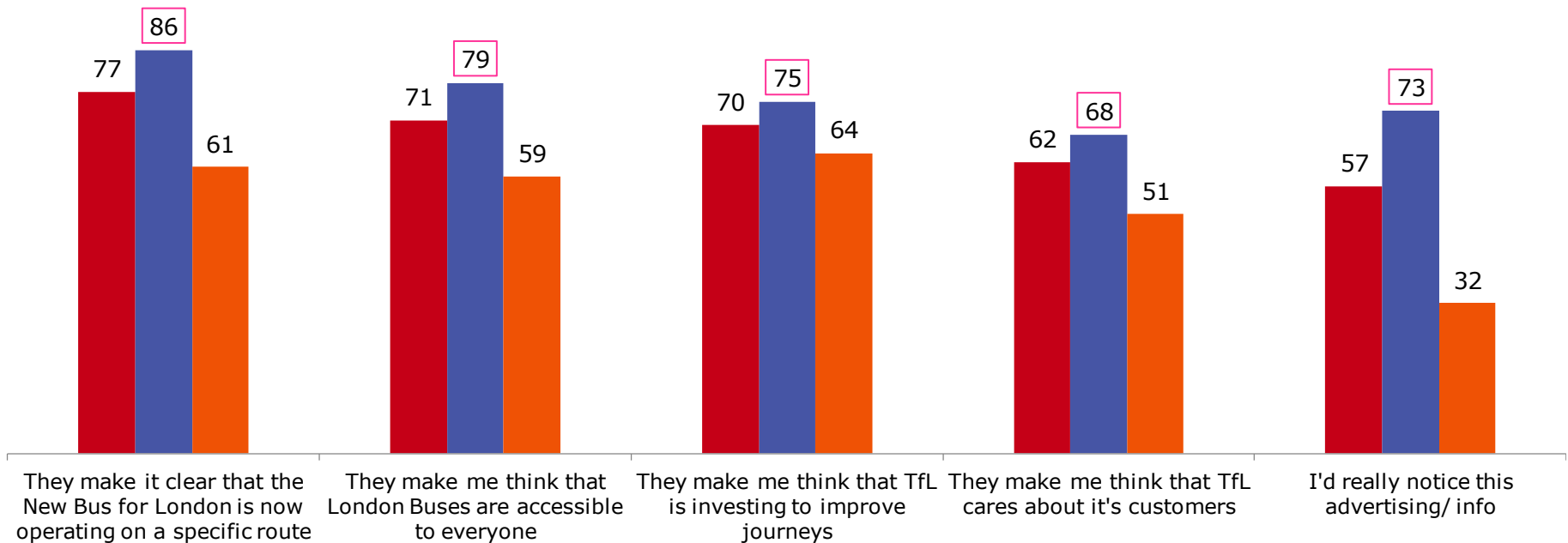
Base: Route 24 users (291)

Diagnostics

Around three quarters of respondents agreed that the ads 'make it clear that the NBfL is now operating on a specific route'. Over two thirds agreed that 'they make me think that London buses are accessible to everyone' and 'they make me think that TfL is investing to improve journeys'. Lower levels of agreement were seen for 'TfL cares about it's customers' and 'noticeability' of the ads. As would be expected, agreement on each was significantly higher amongst those who claimed to recognise the campaign.

% Strongly/ slightly agree

■ All Route 24 users ■ Recognisers ■ Non-recognisers



Q15. To what extent do you agree or disagree with the following statements?
 Base: Route 24 users (291), recognisers (177), non-recognisers (114)

Significant difference between subgroups

3

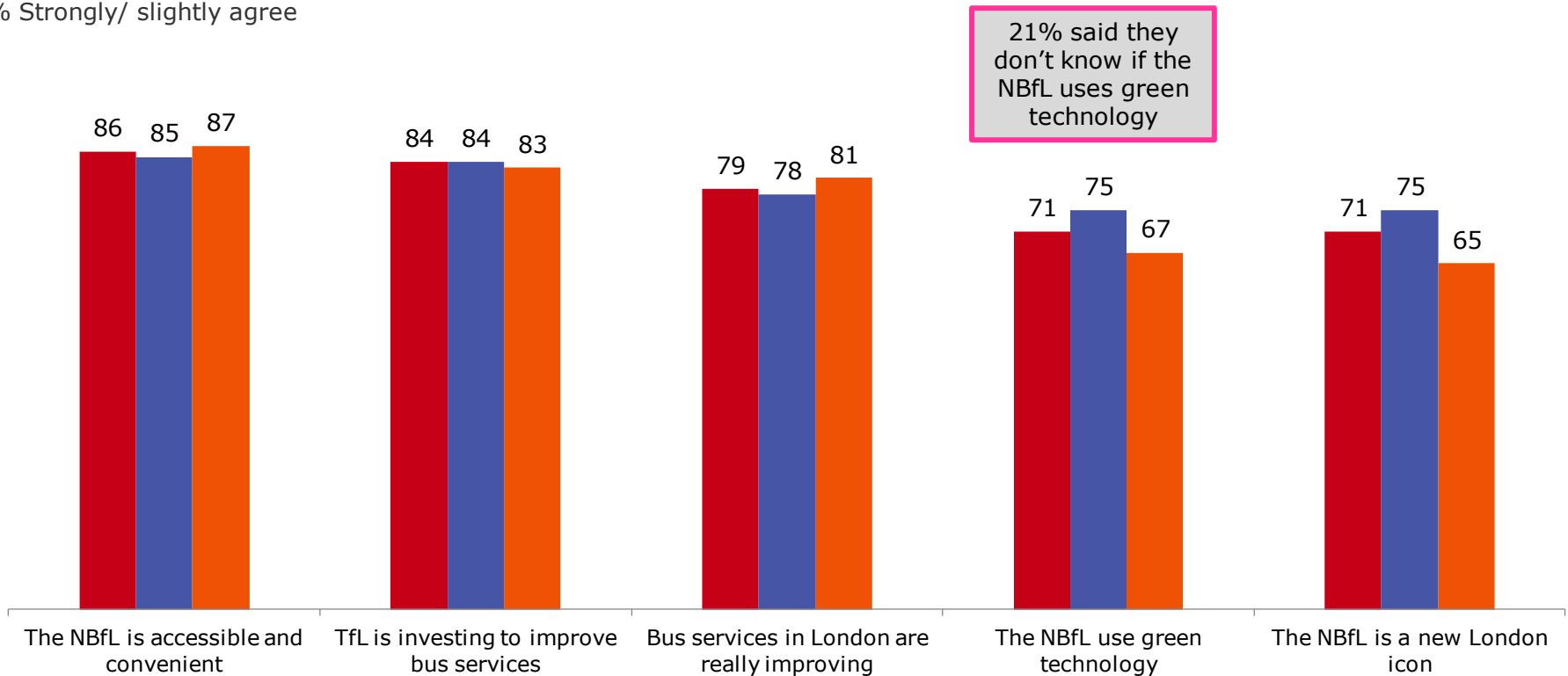
Attitudes

Attitudes

Positively, almost 9 out of 10 Route 24 users agreed that the NBfL is 'accessible and convenient'. High agreement levels were also seen for 'TfL is investing' and 'bus services in London are improving'. Whilst lower levels of agreement were seen for 'uses green technology', the majority who did not agree with the statement responded 'don't know' rather than that they disagree. There was also strong agreement with NBfL being a new icon. Agreement with the attitudinal statements was overall quite strong, although it didn't differ significantly amongst recognisers

% Strongly/ slightly agree

■ All Route 24 users ■ Recognisers ■ Non-recognisers



Q8. How much do you agree or disagree with the following statements about London Buses?

Base: Route 24 users (291), recognisers (177), non-recognisers (114)

4

Methodology

Face-to-face interviews conducted at Route 24 bus stops

Research timing:

25th July – 5th August 2013

Sample: random recruitment of those disembarking from buses at Route 24 bus stops

Base:

291 adults (16+) who state that they use Route 24 at least twice a week

131 high frequency users (5+ days a week)

160 medium frequency users (2-4 days a week)

Questionnaire coverage

Awareness

Understanding of the role of the conductor

Advertising and other information awareness / Ad memories

Recognition, Ad Response and Diagnostics

Attitudes

