

**Buses marketing
communications
development**

09032

August 2009

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Research conducted by 2CV

Agenda



Introduction to the research

Executive summary

Perceptions of the bus and barriers to usage

**Experience of buses
(Case studies from accompanied journeys)**

Marketing and web initiatives

**Appendix – increasing specific bus journeys,
sample, propositions**

Introduction to the research

Research objectives

- The research objectives as stated in the brief are:
 - *To assess the barriers to using the bus in outer London (focusing on North London)*
 - *To establish awareness of the inter-suburban bus routes*
 - *To establish barriers to usage of these routes, and assess what would make people use them*
 - *To assess reactions to various advertising propositions and internet-based information solutions, in terms of a) relevance, b) appeal, c) likelihood of making people travel more by bus*

Methodology and Sample

- Methodology
 - Cultural analysis – exploration of cultural themes that may be influencing customer response to buses.
 - Themes used during depths, accompanied journeys as probes
 - 9 x 2 hour depths + accompanied journeys
 - Focus on exploring personal barriers to increased bus usage
 - 6 x 1.5 hour groups
 - Focus on propositions and web initiatives, test barrier hypotheses from depths, accompanied journeys
- Sample (detail included in Appendix)
 - All respondents from North West London
 - Spread of infrequent and non-users of buses
 - Spread of peak and off-peak journeys
 - Spread of long and short journeys

Executive summary

The most practical barriers for infrequent users (especially) and non-users of buses are underscored by a perceived lack of information

- This barrier creates and exacerbates an impression that the system is unregulated → therefore unpredictable → therefore unreliable
 - The web-based concepts go a long way to addressing these barriers, as do the on-bus features such as iBus, in that they give the impression of a more regulated, predictable and reliable service, and would encourage usage of the bus for unfamiliar journeys
 - The advertising propositions that support the web information initiatives (through mentions of website and investment in IT) are also well-liked

Emotional barriers are deeply ingrained for non-users

- More emotional barriers to using the bus are underpinned by an underlying set of negative cultural associations, with the bus as a socially inferior form of transport
 - For this reason, the propositions that attempt to address the image of the bus are much less liked, and lack credibility
 - This is because they fail to counteract some of the more ingrained emotional barriers to bus usage; such as self-image, the perception of crime, the attitude of drivers and a dislike of various aspects of ambience

Perceptions of the bus and barriers to usage

Positives of taking the bus are recognised

- Non/infrequent bus users readily accept the positives, namely...
 - Accessible for all – serving the common good
 - Accepted, and respected as useful transport service for people who can't get around any other way; Teenagers, the elderly, Mums with prams
 - Iconic/nostalgic
 - Tourist attraction, souvenirs, pride
 - Buses as a rite of passage
 - Low cost – if have an Oyster card
 - Admittedly this is more the case for more regular infrequent users
- Interestingly, environmentally-friendly, improvement in information and improvement in crime not mentioned/noticed at all by this target

But for non/infrequent bus users, these perceived positives can also be seen as negatives

POSITIVES

- **ICONIC/NOSTALGIC**



But on other hand...

- **SERVING THE COMMON GOOD**

"They're great for teenagers who are too young to drive, or the elderly who might have difficulty driving or going by tube" – non-user

But on other hand...

- **CHEAP/ECONOMICAL**

"I know it's the cheapest mode of transport, I guess that's why it's the least comfortable and reliable" – non-user

But on other hand...

NEGATIVES

- **A MODE I HAVE MOVED ON FROM**

- Seen as somewhat outdated compared to car/Tube

"When I passed my driving test my instructor said I'd never take the bus again" – infrequent user

- **FOR PEOPLE UNLIKE ME**

- A mode for people who have no other choice

"It's not great, but then they're not designed for me – they need to do a good service for people who really need them" – non-user

- **GET WHAT YOU PAY FOR**

- Happy to pay more for more comfortable/quicker journey

While the buses have numerous positives, the negatives tend to be much more real/current

Cultural commentary reinforces user imagery of the 'common good'

From the top deck of the 476, stuck in traffic on the Essex Road, I see a man who lives above a shop proudly hold up a baby garment that he has just ironed. I see a lover blowing kisses to a woman who has just boarded. I see the little kids on the front seat pretending to drive the bus. I see a hungry-looking, middle-aged guy sniffing, but not eating, his bag of Krispy Kreme doughnuts. Omnibus. Transport for everyone. All human life is here.

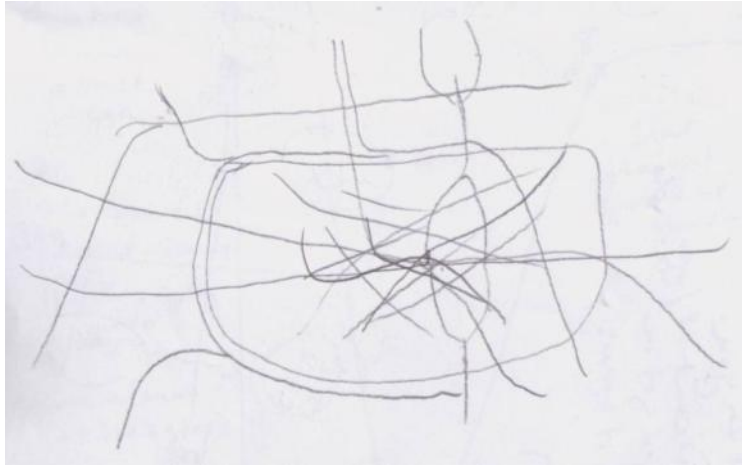
<http://www.timesonline.co.uk/tol/travel/article2900602.ece?token=null&offset=12&page=2>

The bus network the lifeline for the true working classes, those with little income, or whose income barely edges over their rent, bills and food. Without the buses, they'd have to take up cycling, and failing that they'd be bankrupt. The buses save the poor from even further deprecation. Lets face it, this is a socialist issue - under the conservatives the buses would be called a waste of tax payers money, we'd find reasons to streamline the service, make it more efficient, and the poor as a result would loose out, becoming worse off economically and more isolated. Mind you, as James Cross has pointed out, for a single unemployed person, whose cash income is between £6.50 and £8.20 per day depending on their age, the £2 cost of a return bus journey can be prohibitively expensive. In 2005 11- to 15-year-olds were able to travel free on buses. In 2006 that privilege was extended to under 18s in full-time education.

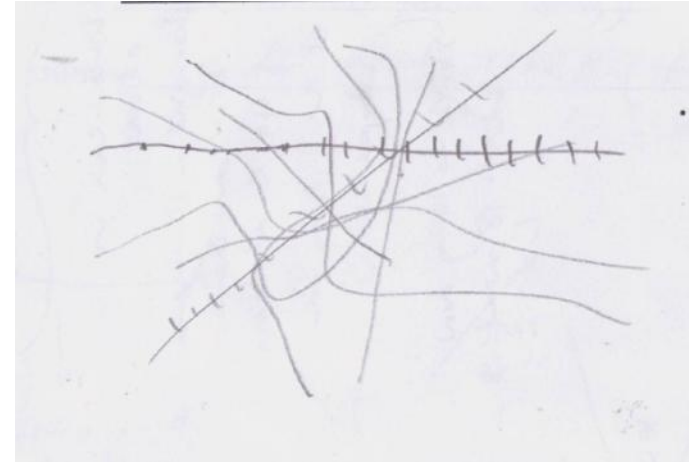
<http://www.ravishlondon.com/londonbuses/>

Infrequent and non-users aren't sure how the buses work

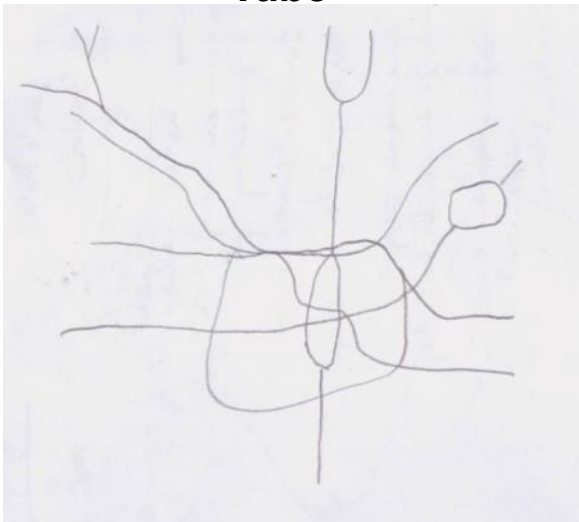
Projective technique: Draw the Tube system. Draw the bus system.



Tube



Bus



Infrequent and non-users aren't sure how the buses work

"Every borough manages their own bus system – that's why when I go to Hertfordshire it screws up" - infrequent user

The tube system	The bus system
<p>Can see the whole system at once</p> <p>Draws on map heritage, pride in design, a tool that is functional and emotional to use</p> <p>Results in a more managed and regulated system and the confidence that anyone can work it out</p>	<p>Chaos, disordered, organic (like the streets)</p> <p>Impossible to get a sense of the whole system at once</p> <p>Very little reference to bus maps – best case scenario is knowing 'my route',</p> <p>No experience with looking up buses on Journey Planner</p> <p>Results in feeling there is a lack of management, lack of design in how the system works</p>
<p>There's a system, I can get anywhere on it</p> <p>I can do it – expect to be able to figure it out at the station</p>	<p>No system, just the routes I know</p> <p>For other journeys 'I'm on my own' – sense of isolation</p>

It will be difficult to increase usage unless a greater understanding of the bus system is achieved

Perceptual barriers can take three forms

Adapted from Donald Norman's 'Emotional Design: Why we love (or hate) everyday things', we used the following model to analyse the elements of the bus experience:

How the system works

Explore: the system, timetable/reliability, maps, information, staff, journey planner, experience – day vs. evening, zones, types of journeys and mindsets

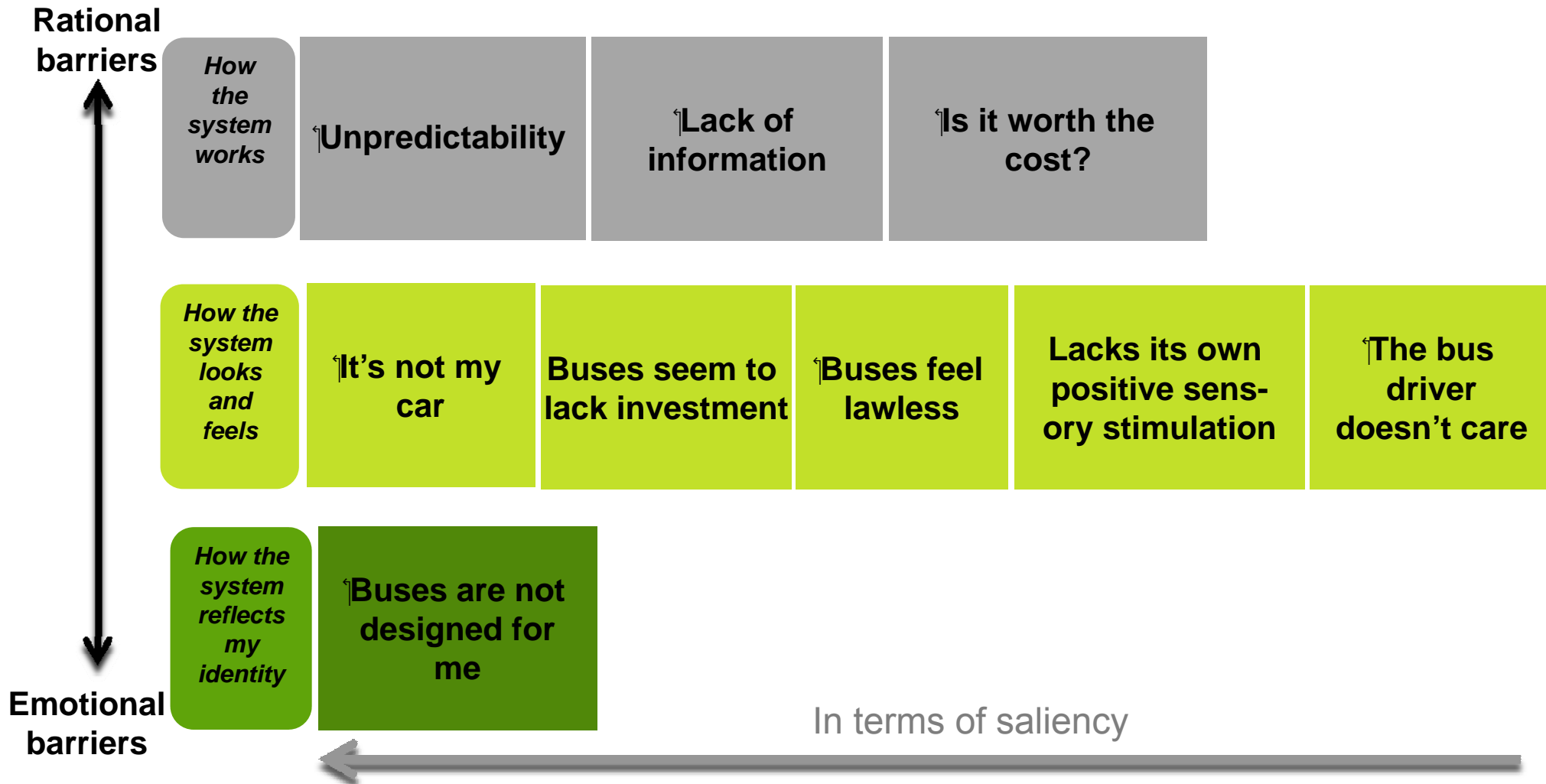
How the system looks and feels

Explore: the built environment, communications, the bus as an object/physical space, bus shelters, double decker vs. single, ambience, sensory associations (temperature, smell, colour, sounds, etc.)

How the system reflects my identity

Explore: user and non-user imagery, image of buses, values, impact of cultural messages

Lots of perceived barriers to taking the bus for non/infrequent bus users



Perceived barriers; how the system works

BARRIERS

WHAT IS IT?

WHO IT AFFECTS?

1. Unpredictability

- At mercy of traffic and **unpredictable occurrences on road** – means **schedules are not trusted** (don't know when next bus is due and how long a journey will take)
 - 'About every' on schedules just emphasis this
 - Sets up expectation that unless the bus comes immediately the wait will be 'forever' (i.e the bus either comes now or will not come for a long time)
 - Drivers feel they can circumvent traffic more than bus on fixed route
- Perception that buses are quite **infrequent** (compared to Tube)
- Not always obvious if the bus route will be direct or 'go round the houses' until the user is on the bus

The bus system feels unreliable

- Everyone (especially at peak times)

"We could be waiting here forever" – non-user

2. Lack of information

- Despite information presented at bus stop and on website...
- ...**a lot of doubts remain** – how long it will take?, am I on the right bus?, which stop do I get off at?
- Also a strong feeling that **bus driver cannot be relied upon for information anymore**
 - Feels removed from the rest of the bus and can often be counterproductive in terms of advice (many examples of giving wrong information)
- Sense of **unpredictability only reinforces** the **need for accurate information**

In the absence of real time information, feel unable to make informed travel decisions

- Infrequent bus users especially tend to notice this

"I asked the driver to tell me where my stop was and he couldn't even speak English" infrequent user

Perceived barriers; how the system works

BARRIERS

WHAT IS IT?

WHO IT AFFECTS?

3. Is it worth the cost?

- Non-users **rarely think it's 'worth' not taking the car for local journeys**
 - Don't think about cost of petrol/parking for local journey
 - Their time and comfort is worth the extra expense
- Infrequent users likely to **weigh up cost of taking bus against other modes**
 - E.g. "is it worth £1 to take bus up the road?" having to pay for each segment of the bus journey feels expensive
 - Sense that cost can be roughly the same to Tube in outer zones
- For those without Oyster, **£2 can feel like quite a lot**

Even at £1, it doesn't always feel like value for money

- Everyone

"I'd rather walk up the road than pay the £1" – infrequent user

Perceived barriers; how the system looks and feels

BARRIERS

WHAT IS IT?

WHO IT AFFECTS?

1. It's not my car

- For drivers, attachment to car can highlight inadequacies of bus
 - **Car** provides cocooned comfort and sense of control
 - **Driving is enjoyable** and don't want to give this up
- The bus system, however, forces users to focus on the bus and bus environment, over customer's needs/comfort
 - Waiting at the bus stop exposes people to elements
 - Need to be constantly aware of when bus is coming/stopping
 - Buses stopping all the time – causing uneasy jerking motion

The bus forces users (esp. car drivers) to give up control over their private space

- For most drivers this is a huge issue
- Strong barrier for non-users

"I love my car – I can decide where I go, when I go, the best route to get somewhere and what music I listen to" – non users

Perceived barriers; how the system looks and feels

BARRIERS

WHAT IS IT?

WHO IT AFFECTS?

2. Buses seem to lack investment

- **Bus stop** environment especially **criticised**
 - Often in isolated areas – little foot traffic, not well lit, vandalised
 - Bus stops in disrepair or plagued by teenagers
 - Better bus stops in C. London: live departure boards
- Sense that **buses in NW London don't get investment of inner London**
 - More old buses on the system than in C. London
 - Older buses less cool in hot weather and so expect air conditioning

Buses feel left behind in terms of investment – underscoring their position as a last resort

- Everyone



3. Buses feel lawless

- Generally, bus users are friendly and courteous. However, sense that **teenagers take over certain areas** of the bus experience
 - 'Hang out' at bus stops – responsible for graffiti, litter, vomit, broken windows and other vandalism
- **No** sense of **code of conduct** on buses (issue for infrequent users esp.)
 - The bottom deck and single buses feel safe and out of harm's way
 - Layout of the bus credited - unlike the Tube where everyone stares at each other and there's nothing to look at
 - The **top deck** often accepted as being **out of bounds** if you're not group of teenagers – to sit upstairs is to take on the risk

Code of conduct on the buses is determined by the users, not the bus system itself

- A large perceptual issue for non-users especially (whose perception is rooted in past, therefore perceive the buses to be as lawless as years ago), as well as some infrequent users



Perceived barriers; how the system looks and feels

BARRIERS	WHAT IS IT?	WHO IT AFFECTS?
<p>4. Lacks its own positive sensory stimulation</p>	<ul style="list-style-type: none"> ➤ Infrequents have generally found ways to make the most of time on bus <ul style="list-style-type: none"> ▪ Often making the most out of their down time - reading, listening to music or podcasts etc. ➤ Others find it difficult and can <u>pick up on negative sensory stimulation</u> <ul style="list-style-type: none"> ▪ Outside the bus - In the suburbs, <u>not most pleasing neighbourhoods or scenes to look at</u> - brings up issues with safety, worry about bad neighbourhoods ▪ Inside the bus - <u>Other people especially</u>: noise, fights, antagonism, concerns over who sits next to you. And any sign of <u>disrepair</u> <p>In the absence of positive sensory stimulation, the negatives have the opportunity to jump out</p>	<ul style="list-style-type: none"> ▪ Non-users especially <p><i>“What’s interesting about looking at a load of betting shops on the high street” – nonuser</i></p>
<p>5. The bus driver doesn’t care</p>	<ul style="list-style-type: none"> ➤ Bus <u>drivers historically polite, friendly and welcoming</u> to customers ➤ The only form of transportation where the customer has an opportunity to interact with the driver, yet <u>little/no interaction exists anymore</u> <ul style="list-style-type: none"> ▪ Across sample people felt <u>let down by experiences with drivers</u> ▪ Currently the experience ranges from neutral (no interaction) to negative (there’s a problem, can’t get on, no Oyster, etc.) ➤ Stories from infrequents where passengers had to police situations on the bus and the driver didn’t get involved (some even reported bus driver for this reason) <p>Lacks a reassuring and friendly human presence</p>	<ul style="list-style-type: none"> ▪ Everyone ▪ Especially noticed by infrequent bus users (who have more contact with bus) <p><i>“This driver the other day got into a fight with an eighty year old granny over her Oyster...they’re such bastards” – infrequent user</i></p>

Perceived barriers; how the system reflects my identity

BARRIERS

WHAT IS IT?

WHO IT AFFECTS?

↑ Buses are not designed for me

- Unlike the Tube or the car which are widely regarded as serving 'everyone's needs', **buses have** a more **specific user groups**
- While there is a tacit acceptance that teenagers, the elderly and mums with prams categorically need the service, the current **system feels highly biased in their favour**
 - **Free travel passes**
 - Less urgent occasions/needs
- Given the current reality of not being in control of your time on the bus, **typical users are expected to have time on their side**
 - Not busy/not working, not producing, not contributing...unlike me
 - Can lead to a sense that 'I'm paying for them'
- **Status issue** – many non-users feel they've moved on from buses
 - Lower cost = poor people = intimidating
- Recruitment finding: it was **difficult to find people who 'never' took the bus**, even though they self identify as 'non-bus users'
 - Some distance themselves from being perceived as 'bus users' or choose to forget that they've taken the bus recently

The bus system doesn't feel designed for people like me

- Non-users

"A free service is a free for all" – non-user

Summary of perceptual barriers affecting infrequent vs. non-users of the bus

- For infrequent bus users the key barriers to further usage tend to be practical; especially a lack of understanding/negativity around how the system works – leading to a sense of unpredictability and lack of information
 - On a more emotional level there is also a strong sense of buses lacking investment compared to other modes
- For non-users of the bus deeper emotional, visceral and cultural barriers are especially an issue; buses not designed for me, lacking investment, feeling lawless and lacking positive sensory stimulation
 - Often emphasised by their stronger emotional connection to one mode – namely their car
 - Therefore, accepting the bus will require a tangible cultural shift

Infrequent users present a large opportunity if the more rational barriers are addressed through greater information and sense of investment

But non-users will be a much harder target

**Experience of buses
(Case studies from accompanied journeys)**

The North West London effect

"I have a friend who lives in the South East and they're way more open to taking the buses down there. It just isn't practical in NW London" – Non user

- Non/infrequent bus users in North West Londoners feel quite well served by both public transport and the car
 - Easily avoid traffic congestion by taking back routes
 - Parking not particularly an issue
 - Tube direct and cost effective choice for central London and radial journeys
- Buses often overlooked as the poor relation – in many cases they aren't even considered a viable option
 - Bus routes can meander - far more direct to take the car
 - Length of time on the bus considerably longer than in the car or Tube
 - Car drivers often frustrated by buses on the road

Non/infrequent bus users in North West London feel so well served by Tube and car, the bus becomes less of a consideration

When do infrequent bus users currently take the bus?

- The bus currently tends to be taken by infrequent users as a default against other modes rather than a mode in its own right
 - When the car isn't suitable
 - Night out – drinking and don't want to drive
 - Non-routine commute – may do things after work
 - Parking/congestion charge – cost
 - Short hop down the road
 - When the Tube isn't suitable
 - When it's closed
 - When walking isn't suitable
 - Weather related, if there's a bus coming



Infrequent bus users do not tend to distinguish between types of bus journey (i.e. short vs. long)

In reality (accompanied journeys), there were very few surprises amongst non/infrequent users...

NB. We experienced typical journeys that non and infrequent users would take by other modes than the bus

- Waiting time and journey time quicker than expected in most ethnographies
 - Service perceptions lower than reality
- Most of the time, suspicions or expectations were confirmed
 - Typical user image
 - Bus environment
 - Frustration at lack of knowing when the bus was coming

The bus is suitable for some journeys, but not for others (when car/Tube would be quicker)

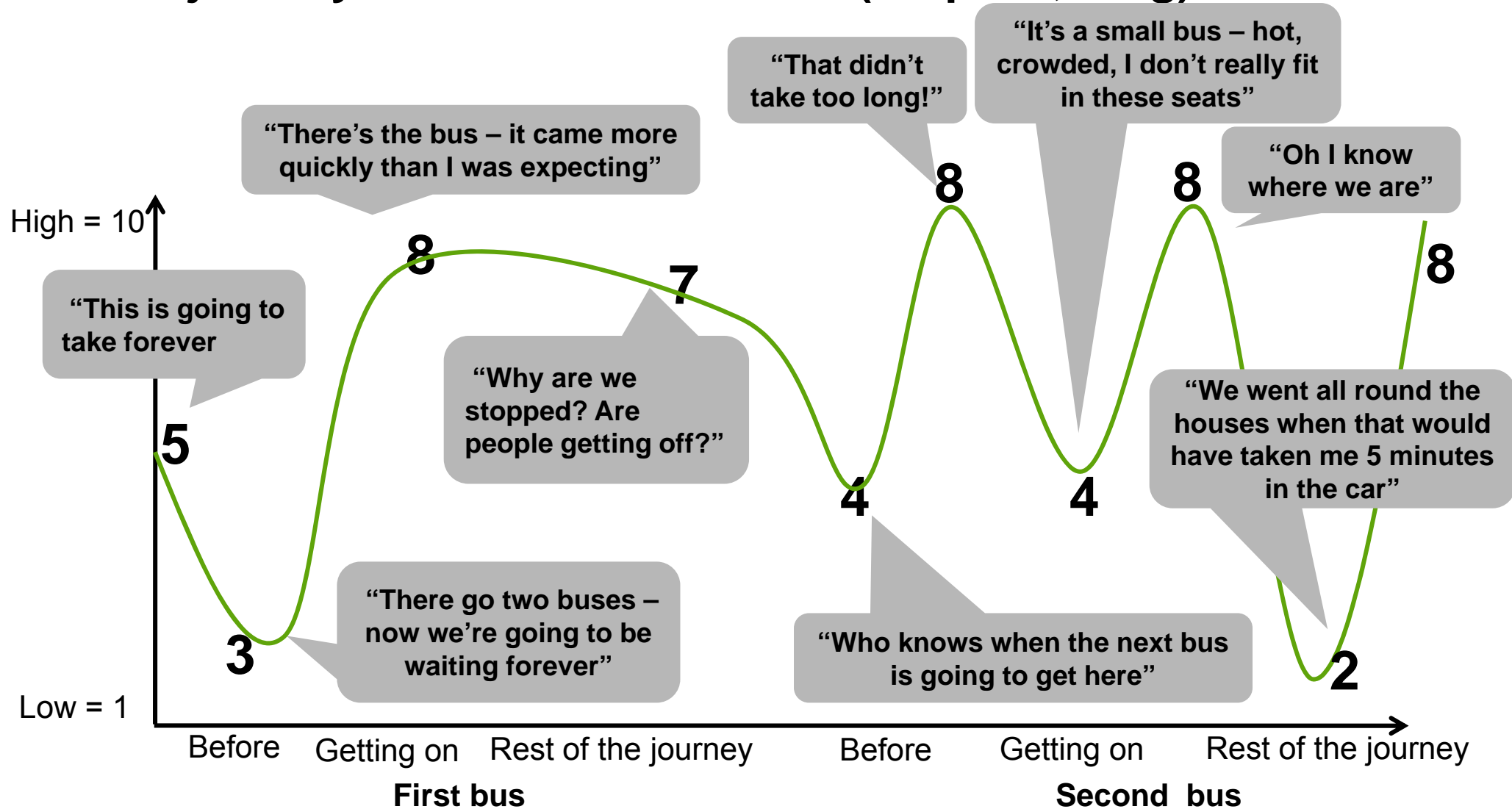
How the system works Case-study: Ben's story (infrequent)

“It's not about how it looks to be driving a car or taking the bus, it's just about getting around quickly”



- 26 years old, lives at home with his parents, Kenton
- Recently bought a car, prior to that he took the bus to work
- Drives a second hand Ford Fiesta – a ‘very practical car’ to ‘get me around’
- Attempting a long journey from Kenton to Mill Hill – should take 40 minutes

Ben's journey to meet some friends (off peak, long)

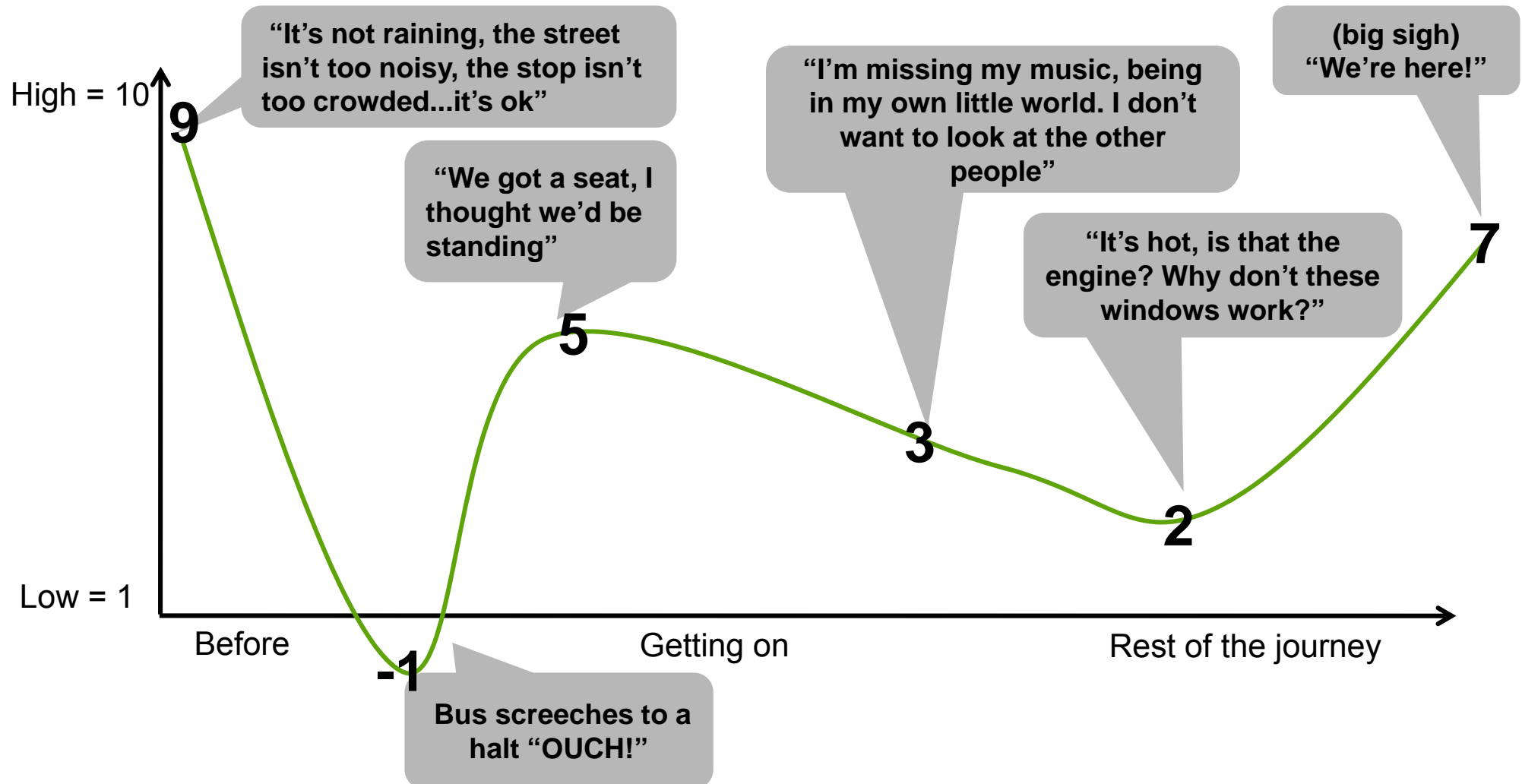


How the system looks and feels Case-study: Ayelet's story (infrequent)

- 32 years old, lives with her brother
- Ayelet lives in Kingsbury and works in Colindale (3 minutes in the car)
- Grew up in the area, familiar with the bus routes from when she was in school
- Has thought about taking the bus to work instead of the car and then walking home to get some exercise



Ayelet's bus journey home from work (peak, short)

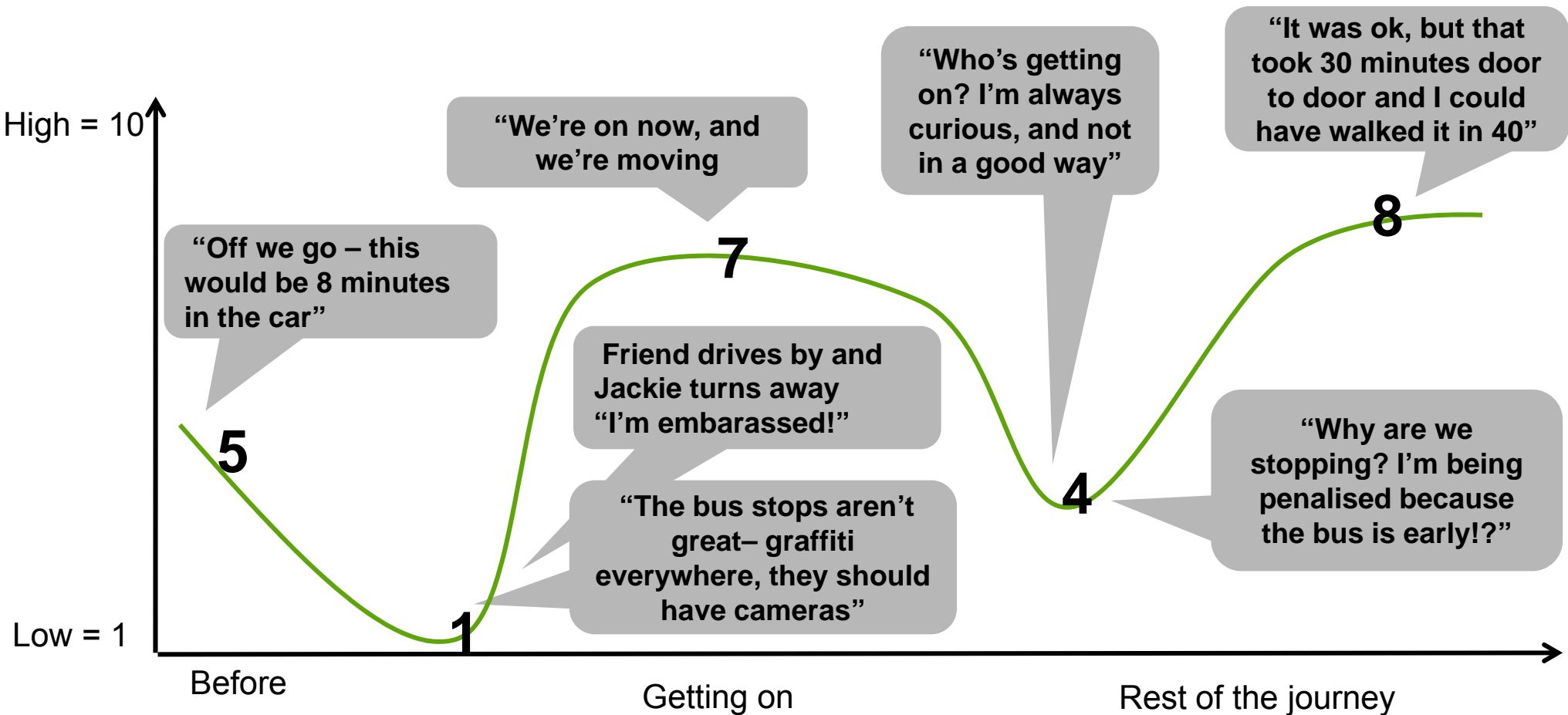


How the system reflects my identity Case-study– Jackie's story (non user)

- Lives in Stanmore, 45 years old, married, 15 year old daughter
- Jackie hasn't taken the bus since she was in school
- She shares a car with her husband
- Her daughter goes to school in Kingsbury – there's been muggings of school kids and police now supervise the station
 - Wouldn't let her daughter take the bus alone at night
- Bus stop is at the Tube station, 10 minute walk
- Uses the Tube for journeys into Central London, car and walking for local journeys
- Could imagine taking the bus to shops in Edgware (at times when she doesn't have car), since it's not easy on



Jackie's bus journey to the shops in Edgware (off peak, short)



Summary of *How the system works* – positive and negative elements from accompanied journeys

	Before	Getting on the bus	The rest of the journey
+	<ul style="list-style-type: none"> ➤ Catching the bus, aka 'getting lucky' ➤ Departure boards at the bus stop (although rare) 		<ul style="list-style-type: none"> ➤ Information boards and tannoy announcements on the bus ➤ Following a very direct route (often the same route the user would take in the car) ➤ Going fast in the bus lane
—	<ul style="list-style-type: none"> ➤ On the way to the bus stop – not knowing when the bus is coming ➤ Waiting at the bus stop – can't relax, must watch for fear of missing the bus ➤ 'About every' estimates on the bus stop timetable – not precise, unreliable, at the mercy of traffic ➤ Three buses arriving at once ➤ Journey planner – can be helpful but often gives the wrong information on bus routes 	<ul style="list-style-type: none"> ➤ Driver not helpful – often difficult to communicate and gives the wrong information ➤ Not having Oyster – have to get off to buy ticket, twice as expensive, is this worth £1? £2? 	<ul style="list-style-type: none"> ➤ Getting stuck in traffic when could easily avoid it in the car, on foot ➤ Sudden diversions ➤ Routes that go around the houses ➤ Waiting at stops while the bus regulates service (or worse if it's not clear why the bus is stopped) ➤ Stopping at every stop

Summary of *How the system looks and feels* – positive and negative elements from accompanied journeys

	Before	Getting on the bus	The rest of the journey
+	<ul style="list-style-type: none"> ➤ Ads on the outside of buses – often entertainment (movies, books), quirky and interesting messages. Something to look at while waiting for the bus ➤ Shelters protect from the rain 	<ul style="list-style-type: none"> ➤ Getting a seat ➤ Single and bottom deck of the bus feels safe, friendly 	<ul style="list-style-type: none"> ➤ Looking out the window – familiar, feels safer than the Tube ➤ Top deck when there are no teenagers at the back – great views ➤ Breezy
–	<ul style="list-style-type: none"> ➤ Bus shelters with graffiti, rubbish, broken windows ➤ Intimidating people (often teenagers) at bus shelters 	<ul style="list-style-type: none"> ➤ No interaction with bus driver ➤ Bus driver expected to be unfriendly ➤ Top deck when teenagers are at the back – territorial and can't enjoy the views from the top, front ➤ Old buses – chipped paint, tatty and dirty seats, cramped spaces 	<ul style="list-style-type: none"> ➤ Giving up your seat for others and therefore standing - especially off peak, always others that need your seat more than you do ➤ Heat – warm days, no air conditioning, lacking breeze ➤ No implicit code of conduct on the top deck where teens are out of sight ➤ Boring – the bus itself lacks personality, culture, stimulation, no distraction from looking outside at less salubrious scenes ➤ (Minority) Motion sickness can inhibit reading on the bus

Summary of *How the system reflects my identity* – positive and negative elements from accompanied journeys

	Before	Getting on the bus	The rest of the journey
+	<ul style="list-style-type: none"> ➤ Sometimes everyone needs to take the bus – it fills a role as a useful last resort ➤ ‘I’m a Londoner, why would I drive’ – non car drivers proud of the fact they don’t drive and the bus is great for certain journeys 		
—	<ul style="list-style-type: none"> ➤ Some people are embarrassed to be seen waiting at the stop 	<ul style="list-style-type: none"> ➤ Typical bus users aren’t like me <ul style="list-style-type: none"> • Teenagers, mums with prams, elderly ➤ Users must ‘have all the time in the world’ 	<ul style="list-style-type: none"> Unsavory people ‘selecting’ to sit next to you – feel boxed in

Non/infrequent users, not surprisingly, most positive about short journeys



- Currently short journeys are the most frequent type of bus journey for infrequent bus users
- Short journeys give less opportunity for all the perceptual barriers to materialise (as seen in the accompanied journeys)
- The biggest barrier to increased short journey usage is a lack of information
 - Waiting times and unpredictability of journey can make short journey feel like a long journey
 - Can question whether it is really worth it, time-wise and cost wise vs. walking/car
- Despite greater access to information, peak commuter journeys continue to suffer from time issues (esp. for Tube users)
 - Time pressured – need to be at work at a certain time, don't have extra time in the morning
 - Car drivers often frustrated by roads at peak time, but don't believe buses would be much quicker

"I just think I might as well walk if it's just 15 mins down the road" – infrequent user

Off-peak short journeys represent the most obvious opportunity in the short term

Long journeys exacerbate all the barriers



- Length of journey exacerbated by unreliable waiting times, unpredictable occurrences on the roads, etc. (esp. at peak times)

“I’d imagine that you’d have to leave half a day to get across north London on the bus at peak times... It must stop everywhere and be really slow” – non-user

- Taking two buses is usually a no go; more unpredictable, more cost, more out of comfort zone
 - But live information before and during the journey could help alleviate these issues
-
- Long journeys heighten all the underlying, more emotional barriers
 - More time to notice any negative environmental factors – temperature, cleanliness, other people, etc.
 - Long journeys force the user to admit to being a ‘bus user’ – sometimes they aren’t ready to do so

Long journeys (esp. at peak times) are a much tougher sell

Orbital bus routes

- Infrequent users currently aware of cross North London buses but not aware of the term 'orbital'
 - Appreciate buses that cut across Tube lines or help them access areas that would ordinarily require going in and back out of London on the Tube – and this is key reason for awareness/usage of Orbitals
 - People may realise that there are one or two routes of this nature that will serve their 'cross London' needs but aren't aware of the whole system
 - When informally shown the Orbitals map of North London, extremely positive reaction - many more routes and destinations than expected
 - With increased awareness can imagine using these more often – esp. for shorter journeys

*“Visualising the whole map like this is great... It would definitely make me take the bus more often”
– infrequent user*

Orbital bus routes

- However, 'long' orbital bus routes suffer from perceived length of time the journey will take
 - Fast buses (i.e. Express) spontaneously suggested by one or two infrequent users to counteract the time issue
 - Expected alongside buses that serve the full route (i.e. Route has fast and normal service)

Short orbital journeys represent the most obvious opportunity for increasing usage of Orbital bus routes

The fact that Orbitals cut across London, rather than their length, is seen as the key benefit to users

Marketing and web initiatives

Response to (mainly web) initiatives was much more positive than the comms propositions

- Unanimously across the sample, the tested initiatives created much more engagement, enthusiasm and potential to change behaviour than the comms propositions
 - All of the web initiatives were largely interesting and motivating – powerfully addressing some of the key barriers and creating more interest in taking the bus
 - The response to the comms propositions was more subjective, but largely did not motivate people enough to want to take the bus more frequently

- The most powerful comms actually play alongside the web initiatives by alluding to a modernisation of the bus system through new technology

Suggests a real need to lead with the initiatives first and foremost – can these be used as the marketing messages themselves?

The initiatives were very positively received...

- Very positively received across the group
 - While this was partly a research effect... Interestingly, everyone's perception of buses rose dramatically when seeing these – effectively tackling lack of investment and information barrier

“They just make it feel so much more modern than I thought” – non-user

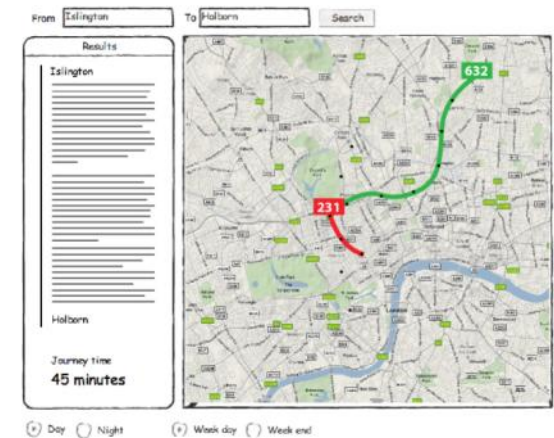
“I love them... they are really clever, just what the buses need” – infrequent user

- Many are using web for car and Tube info – namely Journey Planner and other car route planers
- Most have not thought to use web for bus info – seen as less of a ‘controlled system’, unlike Tube
 - Those who have used Journey Planner for buses report negative experiences
- So, much curiosity to use some of these resources (although hard to tell from this research how much they'll actually be used)
 - Especially amongst infrequent bus users who are already using the likes of Journey Planner,
 - Non-users would be less likely to actually use them

Even if not used widely (to begin with) awareness of web initiatives effectively tackles the barriers of unpredictability, lack of information and lack of investment and goes a long way to make the buses feel more modern

Specific response to web initiatives; Information about the bus journey/route

- Very positive response
 - Love the visual nature – seeing the route (as well as the description) puts an element of control back into the journey
 - And supports the finding that when shown a map of the bus, people are better equipped to envision new journeys
 - Counteracts some of the unreliable bus information some infrequenters have experienced on Journey Planner
 - Frequency details are appreciated
 - However, ‘about every’ can reinforce unpredictable nature of bus
- While people like the concept of email alerts of disruptions –there is much more spontaneous interest in having this service on mobile (via text messages), amongst younger esp. – although generally expect this to be free

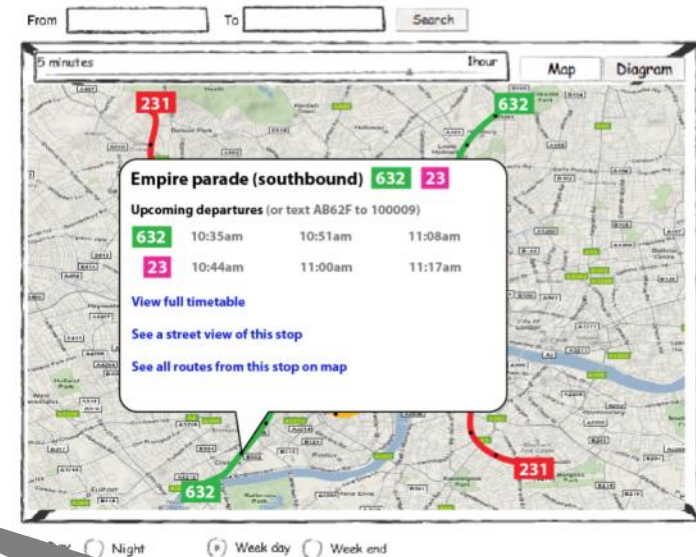


“You’d be much more likely to need to check out the disruptions when you’re actually travelling wouldn’t you?” – non-user

Specific response to web initiatives; Bus stop information

- Presenting all this information in a clear and concise manner gets over various barriers
 - Makes the buses feel more like a well run ‘system’
 - Makes buses feel more reliable and frequent
 - Seeing all the buses that go through the stop allows people to see that there are plenty of ‘back up’ options

- Many spontaneous calls to have a ‘mobile version’, as it is felt that this tool could be of more use while on the move
 - A text version is imagined spontaneously
 - A phone application is also imagined by iPhone users especially



*“Seeing all the buses going through a bus stop at specific times would probably make you realise how many buses there actually are that you could take”
– infrequent user*

Specific response to web initiatives; Info to help get off at the right stop

- Next bus stop info through on-board display and speaker is well liked across the sample
 - Some infrequent users are already aware of these or are familiar with them from the Tube
 - Minimises need to rely on 'unreliable' driver
 - Feels like there is more of an itinerary they need to stick to
- Sense that these could be used for further info
 - E.g. Give more 'real' time info – any disruptions, delays etc., Give more info about any attractions (e.g. parks, good shopping to access)



Specific response to web initiatives; Info to help get off at the right stop

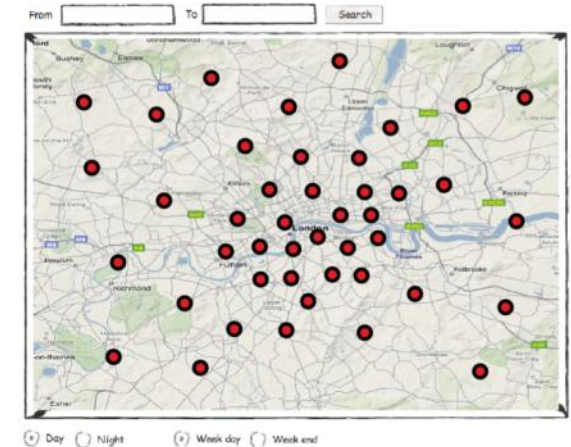
- Seeing the street view of the bus stop is also well liked
 - Modernises image of bus – by making it feel like they are tapping into latest tech trends – e.g. Google street view
 - Can take out some of the worry of waiting at bus stop
 - Imagine it will help with safety and navigation – looking out for landmarks around the bus stop



“It would take out the stress of whether you’re getting off at the right stop” – non-user

Specific response to web initiatives; Finding the right bus map

- Concept of being able to zoom into specific areas for bus stop info is appreciated – as a means of personalising info and allowing more control
- Stimulus used made it difficult to pin point a new area – feel like slightly random spots
- Also zooming into the specific streets for bus stops can make the system feel even more confusing (esp. for non-users)
 - Note this may have been caused by this stimulus being missing the accompanying bus stop index



Specific response to web initiatives; Comparison across modes

- Seeing the comparison across modes is interesting and it does promote curiosity in less frequent modes- esp. amongst infrequent users
 - Seeing the four areas of comparison is appealing and works quite subjectively across the sample as different people are comparing different criteria
 - Time and cost vs. car can be quite surprising and interesting
 - Imagine it might be more powerful if given over longer period (e.g. monthly) as well as per-journey comparison
 - Interest in seeing Overground included
- However, it can raise quite a lot of questions (esp. for drivers)
 - *“What time of day was this done?” “Time taken to drive by bus or car at peak will be unreliable”*
 - *“Cost and carbon footprint of car is very variable depending on model”*
 - *“I’d take less time than that... if I took the backroads”*
 - *“I’d never trust TfL to give me accurate driving times”*

“Ah, that’s interesting, I imagined that buses go right round the houses so the car would be lots quicker” – non-user

From <input type="text" value="Hammersmith"/>		To <input type="text" value="Kings Cross"/>	
	Bus	Tube	Car
Time	55 mins	46 mins	1 hr 3 mins
Cost	£1	£2.20	£3.75
Changes	0	1	0
Footprint	0.93 kg	0.68 kg	1.77 kg

iBus and GPS are extremely powerful

“If there’s a service, constantly updating times of buses to the site, how can anyone complain?” – infrequent user



- When iBus and GPS system explained, potentials immediately positive
 - GPS the current travel accessory – Tom Toms, iPhone, Google maps – navigation on the go
 - Modernises the outdated perceptions of the bus
 - Immediately imagine using the live departure information
 - Can start to feel a little the bus is a little more ‘for me’

“When you’re in the car you’re in control, so the control that people have generally in life is gone when you take the bus. This gives it back” - infrequent user

“Wow, that definitely makes me think the bus is more modern than I thought... I just imagined the driver has to press a button or radio every so often to update his location” – infrequent user

The propositions that were best received overtly tackle specific barriers and give signs of proof and/or specific scenarios

- Any mention of technology and modernisation specifically tackles lack of investment and information and can make the bus system feel more regulated (less unpredictability)
 - 3. TfL's investment in information technology is transforming and modernising bus travel
 - 2. investing in modernising London's buses

- Directing people to the website acts as proof of the above and acts as a positive call to action
 - 7. find out about local bus routes, take a look at our website
 - 8. Visit our website and try the local bus

- Presenting realistic occasions or scenarios makes the bus feel 'more for people like me'
 - 4. For some journeys, the bus is easier than the car
 - 6. Some places are difficult to get to because no convenient train or tube

3. Discover 21st century bus travel

Overall appeal

- People agree with the fact that buses are outdated and 'not the most contemporary way to travel'
- Therefore, reference to 'transforming and modernising bus travel' works as a powerful message
 - Although '21st century bus travel' can sound a little odd
- 'Information technology' specifically addresses practical barriers
- Underscores overwhelmingly positive response to web initiatives

Who responds best

- All (infrequent and non-users) respond quite well
- Reference to IT can be more appealing to younger

"This completely addresses what we were saying about the bus being out of date" – non-user

Barriers message talks to

- Especially addresses lack of investment
- Unpredictability and lack of information
- Buses not designed for me (to younger in sample)

"this one would be really interesting if backed up with the web ideas we saw" – infrequent user

Message is appreciated as it directly tackles barrier around lack of investment in buses

2. Bus travel has changed. Have you?

Overall appeal	Who responds best	Barriers message talks to
<ul style="list-style-type: none"> ■ For some non-users (esp. those who haven't used the bus for a while) the insight is accurate – their memories are rooted in the past <ul style="list-style-type: none"> • However, some feel this can bring up too much negative baggage – in contrast to softer statement in previous one ■ Reference to <i>'investing in modernising London's buses for some years now'</i> really helps to contemporise/modernise image of the bus for all ■ But, some infrequent users sceptical about the level of investment, without tangible proof 	<ul style="list-style-type: none"> ■ All (infrequent and non-users) acknowledge this message ■ But some don't see the necessary improvements to merit behaviour change 	<ul style="list-style-type: none"> ■ Lack of investment to some extent

"I haven't seen that much... I guess it's just a lick of paint here and there, is it?" – infrequent user

Reference to investment and modernisation can be an important motivation, but need more proof

4. For some journeys, the bus is easier than the car

Overall appeal

- Car drivers acknowledge all of the issues (volume of traffic, hassle/cost of parking, cost of petrol) – it's what they don't like about the car
- Bus for a night out can be seen as a viable new bus occasion (alternative to car) for younger infrequent users
 - However, older, non-users (esp. women) can feel that this reinforces buses as unruly and makes them feel vulnerable especially at night
- 'let someone else drive' has the potential to turn car drivers off – they don't want to rely on another

Who responds best

- Infrequent bus users, who are less attached to the car
- Some younger car drivers

Barriers message talks to

- Acts as a push away from the car, more than addressing barriers of the bus
- Comparison to car can in fact further highlight numerous barriers of the bus – it's not my car. unpredictability, lack of information, lawlessness

"This is completely false... I mean how on earth can it be more personal than the car?" – infrequent user

While presenting bus as a viable alternative through specific scenario is appreciated, overt comparisons to other forms of transport can also be counterproductive

6. Buses can be the best way for you to travel

Overall appeal

- Infrequent users who rely on PT can relate to the scenario of 'some places being difficult to get to by train or tube'
 - Can offer their own experiences of when train/tube can be inconvenient e.g. Match day, shopping centre
- Allusion to buses that cut across North London (rather than Tube dipping in and out of Central London) is interesting
 - People spontaneously imagine using these to get to Tube stations

Who responds best

- Infrequent bus users who rely on PT
- Drivers (non-bus users esp.) remain more sceptical
 - For them, the car is still king

Barriers message talks to

- Positioning the bus against the Tube/train works to highlight benefits of the bus
- However, barriers to taking the bus are not addressed here

This could be a positive motivation for Orbitals but barriers need to be addressed more overtly for people to truly be motivated by this message

7. Visit a new place by bus

Overall appeal

- Addresses the fact that infrequent users only take buses on known routes – alludes to fact that there are potentially many more useful places to get to by bus
- Reference to the web for buses is an easy call to action for those who are familiar with using website to plan Tube and car journeys

Who responds best

- Some of the older/family respondents like this – potential to discover routes with kids
- Some of non-users can be sceptical of claim of 'how easy it is to take the bus', without proof

Barriers message talks to

- Gives a little more reassurance about how the system works – esp. lack of information
- Also starts to address lack of investment

While this can be quite motivating for some parents for the odd day out with kids, it will not have much effect on changing mass behaviour

8. Discover your bus

Overall appeal

- For some people, 'local' can feel too specific
 - Local area message can be rejected by those who walk/drive/take the bus already without issues in local area
- However, 'New technology' makes the buses feel modern
- Making bus information easy is particularly motivating for many (esp. older infrequent users and young families) who do not have a clue where to go for bus information
- Ref to website again appreciated

Who responds best

- Making bus info easier particularly appeals to some infrequent bus users (esp. Older and young families)
- However, most reject emphasis on local area message

"I already know the buses in my local area – what's to discover?" – infrequent user

Barriers message talks to

- Also, gives some reassurance about how the system works – esp. Lack of information
- Lack of investment

Talking about local area only can feel limiting – if anything, 'local area' is what is known best

But, reference to new technology is really appealing

9. Take pride in riding a London bus

Overall appeal

- Everyone acknowledges that London buses are iconic
- However, for non/infrequent users, the experience of taking the bus in Outer London misses out on the romance
 - Not passing by landmarks, tourist attractions, the buzz of Central London
- As a message, not motivating to increase usage
 - No practical benefit

Who responds best

- Appeals a little to those seeking fun day out (esp. family people) – more as a tourist message
- Limited appeal to change behaviour

Barriers message talks to

- Doesn't address any of the barriers (implicitly or explicitly)

"It's a nice trip down memory lane, but it wouldn't get me on the bus" – non-user

While saying that buses are iconic is felt to be true, it will not motivate people to start using the bus (except maybe for the odd day out)

5. Is the bus a better way for you to travel?

Overall appeal

- Referencing fact that people get into a routine around travel is accepted
 - Appreciate the implicit claim that people do need a jolt to get them out of this habit

- However, very rational message leads to much scepticism (without proof) – esp. against the car
 - Car is still felt to be quicker, easier and for some journeys can be cheaper than bus
 - The emphasis on practical benefits only reinforces the emotional benefits of the car (esp.) or other forms of transport

Who responds best

- ‘Need to break the routine’ can be appealing to some infrequent
- But rational quicker/easier/cheaper message has limited appeal

“This has the opposite effect on me... In relation to my car it actually makes me think that buses take longer, are unreliable and I’ll have to fight for a seat on there” - non-user

Barriers message talks to

- Without proof, no barriers are effectively addressed

Rational benefits are heavily disputed, without any proof

1. My bus

Overall appeal

- While, people agree with statement that choice of how to travel is very personal, positioning the bus as the 'most personal way to travel' is heavily rejected (especially by drivers, and non-users), as untrue
 - The car is widely seen as the most personalised way to travel
- Many of this target are not aware of stops being close to them or they know stops aren't very close

Who responds best

- Limited appeal

Barriers message talks to

- Not seen to be addressing any barriers

"This is completely false... I mean how on earth can it be more personal than the car?"— infrequent user

Bus as personal means of travel is seen as untrue

Orbital propositions

- *We presented two additional propositions specifically around Orbital bus routes*
 - 10. *Orbital buses are better value than any other mode of travel*
 - 11. *Get around London by orbital bus*

- There was a clear preference for 10 over 11, because:
 - It doesn't specifically focus on long journeys
 - Introduces a realistic scenario which is immediately understood and beneficial to Tube users – the inconvenience of having to travel into the Centre and out again to get across North London by Tube
 - Value message underpins this

10. Orbital buses are better value than any other mode of travel

Overall appeal

- Talking about value can be motivating as travel is felt to be a large expense
 - Saying you can take the bus as far as you like emphasises value for money
 - But, some question ‘cheaper the further you go’ message – sense that likely to have to change buses
- PT users immediately see the benefit of being able to cut across North London
- Term ‘orbital’ feels alien
 - Don’t know what it means and some expect it to refer to buses going all the way around London
 - Prefer to refer to them as ‘Outer London’ buses

Who responds best

- Appealing for infrequent bus users, esp. PT users
- Really appealing to those who currently have to cut across North London
- Car drivers, however, do not mind paying extra for car

Barriers message talks to

- Directly addresses cost barrier

“Does Orbital mean it goes all the way around London?” – infrequent user

Can be a motivating message for those who need to get across North London

11. Get around London by orbital bus

Overall appeal

- Referencing long bus journeys specifically is not motivating
 - Most perceive that long journeys are much better (quicker, more reliable, safer, more comfortable) by car or Tube
 - Can simply bring to the fore perceived issues around changing buses and unreliability

- Saying 'You'd be surprised how far Orbital buses can take you' is of little relevance, without more information

Who responds best

- Limited appeal

Barriers message talks to

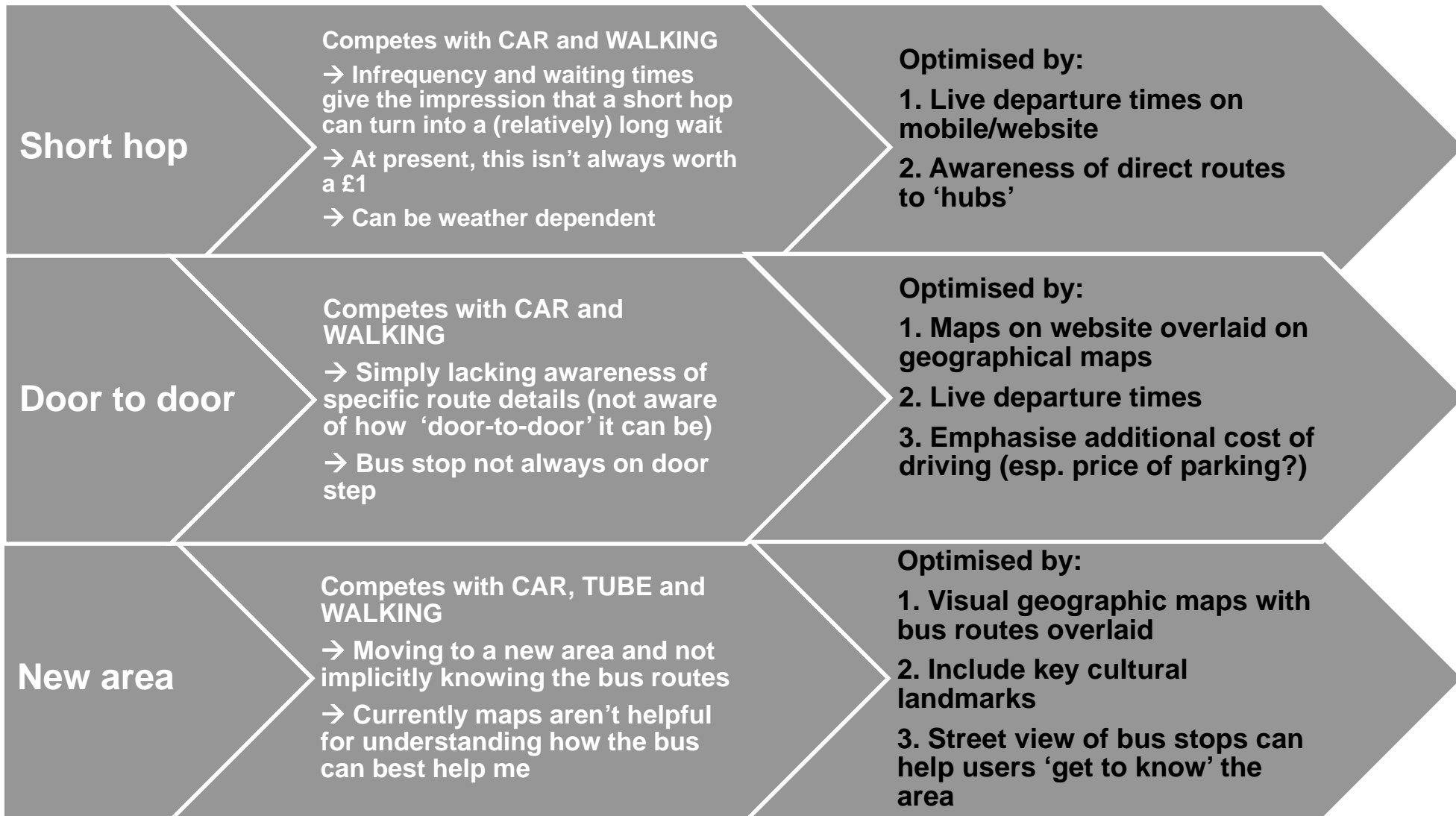
- If anything it can bring out barriers more, as opposed to address them

"You'd be surprised by what? The cost? The time? The ease? New buses? The schedule?"
 – infrequent user

Any overt reference to longer bus journeys simply emphasises the barriers

Appendix: Increasing specific bus journeys

Short journeys optimised by greater information



Short journeys optimised by greater information

Across Tube lines

Competes with CAR
→ Perception that buses are unpredictable
→ Not time-efficient
→ Expensive

Optimised by:

1. Increase awareness of short inter-suburban routes that cut across Tube lines
2. Coupled with live departure times means there are less issues with frequency
3. Good value for money

Night out

Competes with CAR – on way out
→ Just want to get to destination quickly and directly)
Competes with TAXI on way home
→ Currently ruins the end of the evening to wait for the bus
→ Can worry about being alone (safety and finding way) on bus at night - esp. if had a few drinks

Optimised by:

1. Live departures on mobile
2. Before and after Tube shuts: Inter-suburban services that cut across Tube lines
3. Night buses that follow Tube line?

Long journeys optimised by minimising length of time on the bus

**Fun day out
(esp. for
families)**

Competes with CAR and TUBE → Despite less time pressure don't want to feel as though wasting time either

→ Potential disruptions on the road can 'ruin' a day out

→ Responsible for many people exacerbates concern about getting lost

→ Top deck is part of the excitement – but can be 'ruined' by rowdy passengers

Optimised by:

1. Minimising length of journey, maximises the fun

2. Search website for cultural landmarks or 'fun day out' ideas on the bus/area

3. Built environment of the bus – cultural facts, information on the local area, tannoy announcements could tell you more

Appendix: Sample

Methodology and Sample

- Cultural analysis – 3 days exploration of cultural themes that may be influencing customer response to buses. Themes used during depths, accompanied journeys as probes.
- 9 x 2 hour depths + accompanied journeys

Depth	Age	Sex	SEG	Bus Usage	Short vs. Long Journeys	Peak vs. Off Peak	Day vs. Eve/Night Journeys	Location
1	25-34	Male	ABC1	Infrequent	Short	Off Peak	Eve/Night	NW
2	35-44	Female	ABC1	Non-users	Long	Peak	Day	NW
3	25-34	Female	ABC1	Infrequent	Long	Peak	Eve	NW
4	35-44	Male	ABC1	Infrequent	Short	Off Peak	Eve/Night	NW
5	25-34	Male	ABC1	Infrequent	Long	Off Peak	Day	NW
6	35-44	Female	ABC1	Non-users	Short	Off Peak	Eve/Night	NW

Depth	Age	Sex	SEG	Bus Usage	Short vs. Long Bus Journeys	Peak vs. Off Peak	Day vs. Eve/Night	Location
7	16-24yrs	Female	ABC1	Infrequent	Short	Off Peak	Day	NW
8	25-44	Male	C2D	Infrequent	Long	Off Peak	Eve/Night	NW
9	45-65	Female	ABC1	Non-users	Short	Off Peak	Day	NW

Methodology and Sample

- 6 x 1.5 hour groups
- Focus on propositions and web initiatives, test barrier hypotheses from depths, accompanied journeys

	Age and life stage	Sex	SEG	Bus Usage	Short Vs. Long journeys	Peak vs. Off Peak	Day vs. Eve/Night journeys	Location
1	Pre-family; 25-35 years	Male/Female equal mix	ABC1	Infrequent	Mix	Mix of short Off Peak and long Peak and Off Peak	Mix	NW
2	Pre-family; 25-35 years	Male/Female equal mix	ABC1	Non-users	Mix	Mix of short Off Peak and long Peak and Off Peak	Mix	NW
3	Family; 35-45 years	Male/Female equal mix	ABC1	Infrequent	Mix	Mix of short Off Peak and long Peak and Off Peak	Mix	NW
4	Family; 35-45 years	Male/Female equal mix	ABC1	Non-users	Mix	Mix of short Off Peak and long Peak and Off Peak	Mix	NW
5	Pre-family; 25-35 years	Male/Female equal mix	ABC1	Infrequent	Long – Inter suburban	50% Peak/ 50% Off Peak	Mix	NW
6	Family; 35-45 years	Male/Female equal mix	ABC1	Non-users	Long – Inter suburban	50% Peak/ 50% Off Peak	Mix	NW

Appendix: Propositions

1. My bus

We recognise that everyone's journey is different, and their choice of how to travel is a personal one.

Your local bus routes and easy access to stops near you means buses are the most personalised way to travel.

2. Bus travel has changed. Have you?

If you haven't travelled on a bus for a while, you may not have positive memories of the experience.

TfL have been investing in modernising London's buses for some years now, and you'll be surprised how much they have changed.

3. Discover 21st century bus travel

Some people think that buses are a bit outdated, and are not the most contemporary way to travel.

TfL's investment in information technology is transforming and modernising bus travel.

4. For some journeys, the bus is easier than the car

It seems like the car is always the easiest option, but for some journeys the volume of traffic and finding somewhere to park can be a hassle. The cost of parking and petrol is going up and you can't drink if you are driving.

Let someone else do the driving and take the bus.

5. Is the bus a better way for you to travel?

Some people simply don't think about their travel choices. They do the same journeys the same way out of habit.

For some journeys, buses can be quicker, easier and cheaper.

6. Buses can be the best way for you to travel

Some places are difficult to get to because there is no convenient train or tube for your journey.

Outer London buses connect the parts of London that other modes of public transport don't reach.

7. Visit a new place by bus

If you are someone who has no idea about what buses go where, and what your local bus routes are, take a look at our website tfl.gov.uk/buses

You will be surprised where you can get to and how easy it is to take the bus.

8. Discover your bus

If you have no idea about what buses go where in your local area, new technology has made bus information easy.

Visit our website and try your local bus.

9. Take pride in riding a London bus

London buses are an iconic symbol of London life and TfL are proud to carry you by bus.

Londoners are fond of the buses even if they don't use them very often. Try taking the bus again.

10. Orbital buses are better value than any other mode of travel

The cost of travel can be a big expense, especially if you have to travel into the centre and out again to get where you want to go.

Orbital bus journeys are better value the further you go. It only costs £1 with Oyster, no matter how far you travel on one bus.

11. Get around London by orbital bus

Most people assume that the car or tube is best for longer journeys in outer London. It wouldn't occur to people to take a bus, but you'd be surprised how far orbital buses can take you when your journey starts and ends on outer London.