

**River Services  
communications  
development**

**09202**

April 2010

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Research conducted by 2CV

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# Introduction and background



# Research objectives

- To understand barriers to using the river
- To explore response to selected campaign elements amongst potential users and provide guidance for development, including:
  - *Print leaflets copy and strategy*
  - *Response to web concepts*
  - *Improved and simplified poster information at piers*
- To understand preferred sources of information for potential users
- Explore response to the concepts amongst current users in order to ensure these tools also meet their expectations

# Methodology

- We used a mix methodology approach comprising of ethnography, focus groups and intercepts
- Two focus groups with Current Users in London
  - One group with 'Commuter' users
  - One group with 'Leisure' users
- Thirteen, two hour ethnographies with potential users in London consisting of accompanied journeys and depth interviews
  - Eight Potential 'Commuters'
  - Five Potential 'Leisure'
- Two, three hour intercept sessions with visitors, each intercept lasting 5-10 minutes
  - Current Visitor users: Embankment Pier
  - Visitors non-users: London Eye



**Ethnographies with potential users**



**Group Sessions with current users**



**Intercepts with visitors – current and potential users**

# Stimulus

## Creative Approach Commuters & Leisure



## Pier Information Commuters & Leisure



## Distribution Strategy Commuters & Leisure



## Website Commuters & Leisure



## Z-Card Commuters & Leisure



# Note on similarities and differences between user groups

- Unless otherwise stated, findings apply across different user groups
- Quotes are attributed by the following key
  - CL = Current Londoner user
  - PL = Potential Londoner user
  - CV = Current Visitor user
  - PV = Potential Visitor user





# Summary of research findings

# Overview

- Currently there is a lack of awareness and understanding of the River service as a mode of transport amongst potential users
- The current delineation of services between 1) a mode of transport and 2) a boating experience makes sense to Londoners and Visitors when told about the services
- However, the current naming of the services – ‘Commuter’ and ‘Leisure’ is misleading
  - ‘Commuter’ describes a journey to and from work and doesn’t encompass the broad range of journeys that could be taken on this service - Londoners and Visitors have the potential to use the service as public transport for work and/or non-work purposes at peak and/or off-peak times
  - ‘Leisure’ is not clear as a term and doesn’t do the service justice as a unique and exciting experience on the Thames
- Information needs are key to the success of the service.
  - As a mode of transport, other TfL services (tube, bus etc) provide the benchmark for how information is expected to be delivered.
  - For experiential usage, other tourist activities (e.g. London Eye, London bus tours) provide the benchmark for how information is expected to be delivered.



## The context



# For current users, River service creates the feeling that 'it's my great undiscovered secret'

*No queuing for the Jubilee line and I got home in under fifteen minutes. – CL*

*The pier's really close to where I live and I feel safe getting home late at night. – CL*

*It's so civilised!! – CL*

*It's really relaxed unlike other forms of travel in London...I can get a coffee and read the paper! – CL*

*It's just such a nice thing to use. Why use the tube when you can get a seat, have a coffee and watch the world go by? – CL*



*It feels like my little secret. I actually don't want it to become too popular! – CL*

*On a nice day, you just can't beat it as a way to get around London. Amazing views, quick and relaxing. – CL*

*I found out about it by mistake. Not a lot of people know about it. – CL*

*It's far more glamorous. – CL*

**For current users, River service is the hidden gem of transport**

# When knowledge is low, potential users fill in the gaps based on other modes and previous boating experiences

*I kind of imagine it to be like getting your ticket at a fairground. – PL*

*It can't possibly be as packed as the tube would be at this time (5:30pm) – PL*

*I'm looking forward to it! – PL*

*Lots of tourists, maybe lots of kids? – PL*



*It might be chilly – I might need a cardigan. Although some of the boat must be covered right? – PL*

*I have a friend who takes it all the time – I think you might be able to get a glass of wine! – PL*

*Probably a boat every 20 – 30 minutes? – PL*

*It will be slow, not as fast as taking the Tube...and definitely more expensive. – PL*

*I have no idea. – PL*

**For potential users, the imagery of service is predominantly based on a 'leisure' concept**

# Visitors to London are more likely to see transportation as an experience in itself

- Transportation provides many of London's most famous icons
  - Double decker buses, oldest Tube system in the world, black cabs
  - People expect to experience these modes as and when 'at some point' during their visit
- Visitors plan special experiences that involve these transport options
  - E.g. Double decker bus tours
  - A boating experience sits alongside the London Eye, going to the Aquarium or the Tate Modern
  - Tendency for people who are familiar with water transport to think about Riverboat experiences

*I saw the river so I thought that there must be something to do.  
– CV*

*We bought tickets for the hop on hop off bus and river tour...it's the best way to see the city. – CV*

*It started to rain and we still wanted to see the sights...this way we can see London but keep dry.  
– CV*

*In Holland we use boats to get around everywhere.  
– CV*

**Visitors don't plan for how to get around London, but they do plan experiences involving transport**

# For Londoners awareness of the service is currently driven by three main factors

## Word of mouth

- Friend, family member or colleague is an advocate
- Key messages that they hear/pass onto others
  - Glass of wine on the boat
  - 'It's a great experience'
  - A 'plan b' when disruptions occur on the Tube

*A friend of mine takes it but I've just never gotten round to it. – PL*

## Previous boating experience

- Previous boating experience on the Thames for fun – expectation there are boats you can take
- Have moved to London from a boat friendly country/city and want a similar experience

*I went on a disco boat ages ago but haven't been on the river since. – PL*

## Proximity

- Living or working close to the river
- Seeing the pier, seeing other people getting on and off the boats
- Some people put two and two together and go out of their way to find out more
- Others imagine the service to be for leisure journeys only

*I've seen the pier – I walk past it on my way to work everyday. – PL*

**Despite some casual awareness of the service by potential users, rarely turning into action**

# Trial with potential users resulted in comparing the service to other ways of getting around London

- Key comparison points with other modes:
  - Types of journey: could use it for work or non-work journeys,  
A → B
  - Time: how long it takes relative to other modes
  - Information tools: need to know how to get from A → B, how much, how to use the service (when to get on and when to get off) in a clear and concise way
  - Routes / maps: provide an overview of the system, how the piers are integrated with other modes to facilitate planning
  - Frequency of service: provide a reliable service, at regular intervals
  - Role of TfL: provide professional service, recourse if something goes wrong

*Why isn't there a route on the boat like there is on the tube? – PL*

*There isn't any information at the pier – how am I supposed to know which boat to get on? – PL*

*There should be a member of staff at the pier – someone you can ask questions. – PL*

*Ten minutes from Canary Wharf to London Bridge – that's as long as the Tube would take! – PL*

**The practicality of using River service is only revealed upon use**



# Across the sample, potential and current users see the service operating in two distinct ways

## As a mode of transport

- Getting customers from A → B
- Can encompass both work and non-work journeys
- Integrated timetable and schedule
- Can be planned or spontaneous journeys
- Habitual or new journeys
- Londoners or visitors
- Focus on destinations on or around the river and river culture

## As a boating experience

- Creating a unique London river experience
- The boat and the river itself is the primary aim of the experience
- Anticipation and excitement for the event
- Generally planned events
- Primarily visitors although some Londoners would enjoy as well
- Focus on the boat experience and points of interest along the river

*It's like buses – there are the normal buses you take everyday, and the tours to see the sites for the tourists – PL*

**Expectation from the research sample corresponds to the current delineation of River services**

# Customers expect an integrated timetable if the service is to be used as a transport mode

- It's confusing to separate out 'Commuter' and 'Leisure' services in the way it appears in the current leaflet, for example:
  - The 'Commuter' service is or could be used for both work and non-work purposes as a mode of transport
  - Included in the 'Commuter services' are weekend and public holiday services which from a customer perspective are not 'Commuter' services
  - A customer could easily be taking the service for a leisure journey destination at peak hours (e.g. Visiting a friend who lives on the river or a tourist who wants an easy way to get to an attraction)
  - Current 'Leisure' services such as pointing out landmarks and sight seeing guides are not motivating when only using the service as a mode of transport

*Why would I want to get on a boat that takes three hours? – PL*

*I just want to get from a to b as quickly as possible. This doesn't change if I am going to work or going to meet friends. – PL*

*Speed is always a factor when travelling. – PL*

**'Commuter services' as a name is limiting when used to describe the service as a mode of transport – it excludes all other types of journeys that could be taken on the service**

# 'Boating experiences' are considered special events

- Customers can understand how some journeys could encompass more of a 'boating experience' – less about the destination, more about the journey itself
  - Primarily appealing to visitors to London, although some Londoners could see it being appealing when entertaining visitors from out of town
  - This type of experience includes the cruises currently outlined in 'Leisure service' leaflet
- Expect services in line with a sight seeing experience
  - Planned in advance
  - Guided tours
  - Themed journeys
  - Welcoming and friendly environment

*I would take one of the cruises if I had visitors coming to stay. – PL*

*If time is on our side it is a nice way to spend the day. – PV*

*I am planning on taking my children on a day cruise...they will love it even if I will get bored.  
– CV*

**'Leisure services' as a name doesn't communicate the unique experience of boat cruises or tours along the Thames**

# Current naming of the services is misleading

## As a mode of transport

- Getting customers from A → B
- Can encompass both work and non-work journeys
- Integrated timetable and schedule
- Can be planned or spontaneous journeys
- Habitual or new journeys
- Londoners or visitors
- Focus on destinations on or around the river and river culture



Suggest changing name of 'Commuter service' to more open ended name e.g. 'Boat service'

## As a boating experience

- Creating a unique London river experience
- The boat and the river itself is the primary aim of the experience
- Anticipation and excitement for the event
- Generally planned events
- Primarily visitors although some Londoners would enjoy as well
- Focus on the boat experience and points of interest along the river



Suggest changing name of 'Leisure service' to more experiential name e.g. 'Boat tours', 'Boat cruises'



**Two part strategy to unlock the river's full potential for Londoners and visitors**



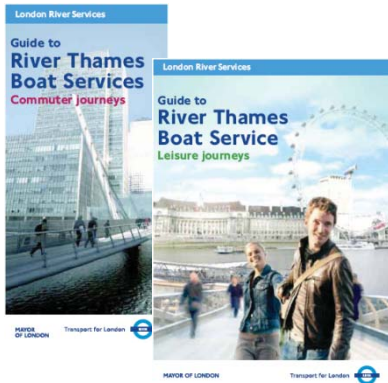
# Exploring information opportunities



# The role of different information points

	As a mode	As an experience
<b>Web</b>	<p>Journey planner Comparison to other alternatives – time and scheduling</p>	<p>Planning before arriving in London Planning while in London Links to other attractions, visitor websites</p>
<b>Pier</b>	<p>Spontaneous journeys Plan Bs – disruptions, closures Can be weather related</p>	<p>Spontaneous activity Social, entertaining Can be weather related</p>
<b>Leaflet</b>	<p>Not considered to be of use – too large to carry around on a daily basis</p>	<p>Planning resource while in London (can be an alternative to web) Overview of all tours/cruises More detailed information – amenities</p>
<b>Z - card</b>	<p>Information to have at hand Systemic overview More detailed information – benefits Handy to keep at hand, encourages spontaneous journeys</p>	<p>Not permanent enough to keep for long term</p>
	 <b>Comparison to alternative transport options</b>	 <b>Comparison to other leisure activities</b>

# Response to the creative approach stimulus

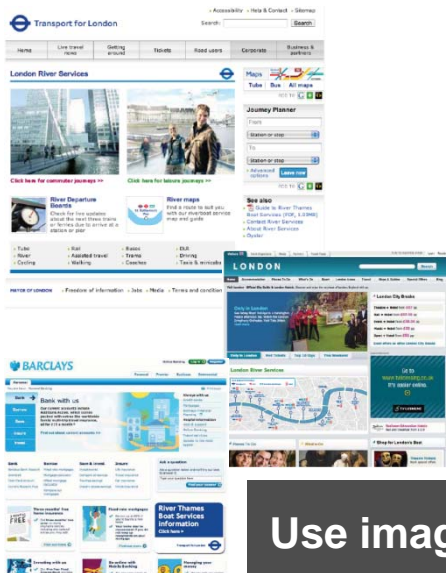


## Response to the leaflet

- ✓ Information split against modal and experiential appreciated
- ✗ Currently confusing names 'Commuter' and 'Leisure' are misleading – need to differentiate against mode and experience
- ✗ Imagery missing boat visuals- Where are the boats? What do they look like?

## Response to the website

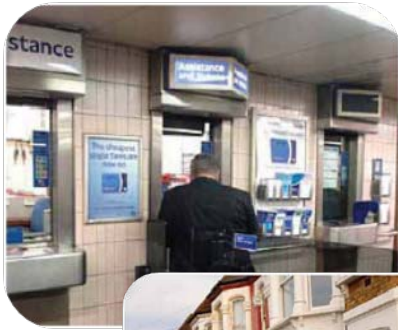
- ✓ Dividing out modal and experiential on the front page is useful
- ✓ A dedicated site especially useful for experiential journeys
- ✓ Modal journey planner expected to work alongside normal TfL journey planner
- ✓ Presence on London visitor websites appreciated
- ✗ Imagery missing boat visuals - Where are the boats? What do they look like?
- ✗ Syndicated web presence thought to be a stretch too far – would simply use TfL journey planner



Use imagery to highlight that this is a boating specific mode of transport or experiential activity

Differentiating between mode and experience is appreciated and can benefit from aligning with other websites (e.g. TfL for mode, visitor websites for experience)

# Response to distribution ideas



## Z-cards for transport mode use:

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- ✓ Perfect size to keep in wallet and facilitate more spontaneous journeys
- ✓ Builds familiarity with the service
- ✓ Size and format builds on 'best kept secret' image of service
- ✓ Expect to find it at other transport hubs, on the boat and home/office drops

## Leaflet for experiential use:

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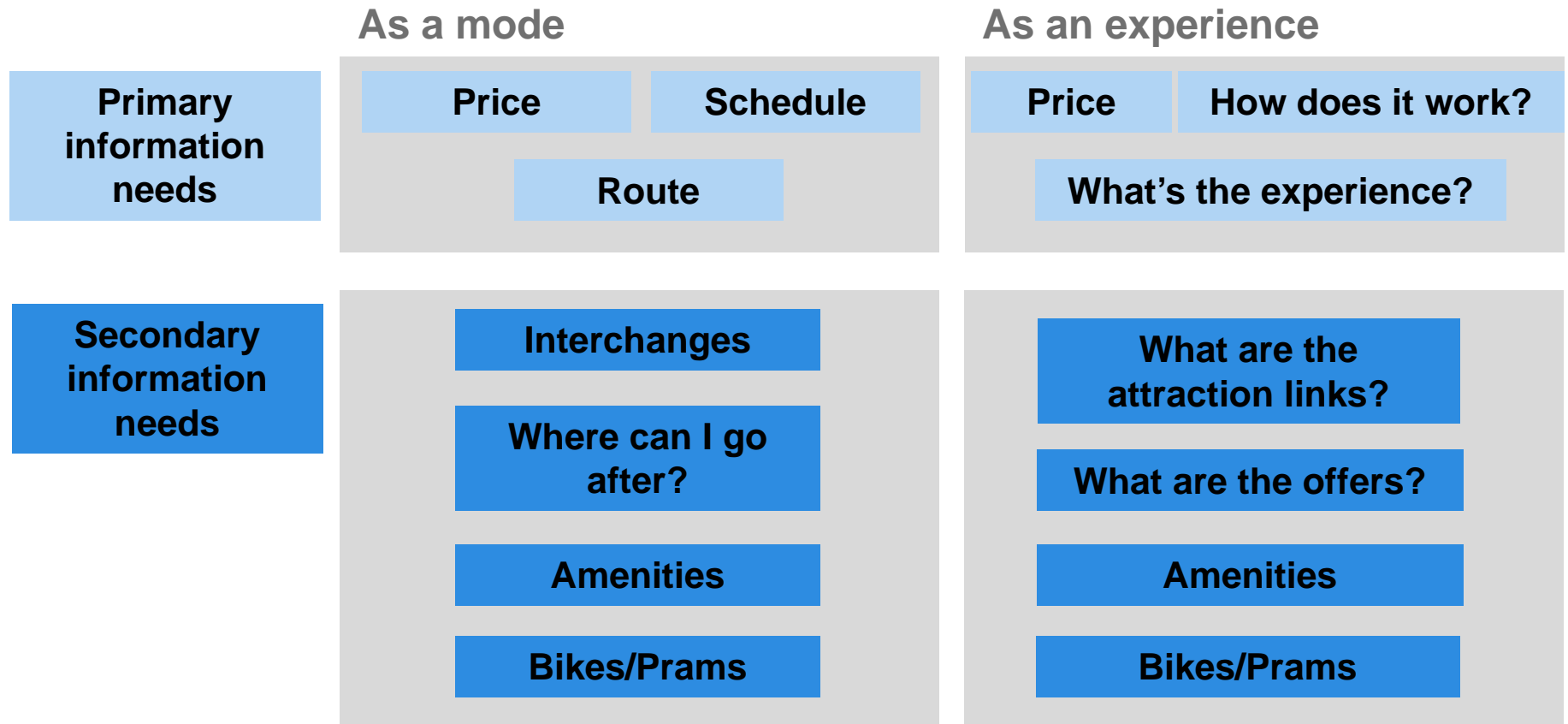
- ✓ Experiential Users appreciate the leaflet to help plan the activity before or while in London
- ✓ Alternative to web – expected to have full information to make decision
- ✓ Expected alongside tourist information at hotels, London visitor websites, tourist attractions and other transport links





# Summary of primary and secondary information needs\*

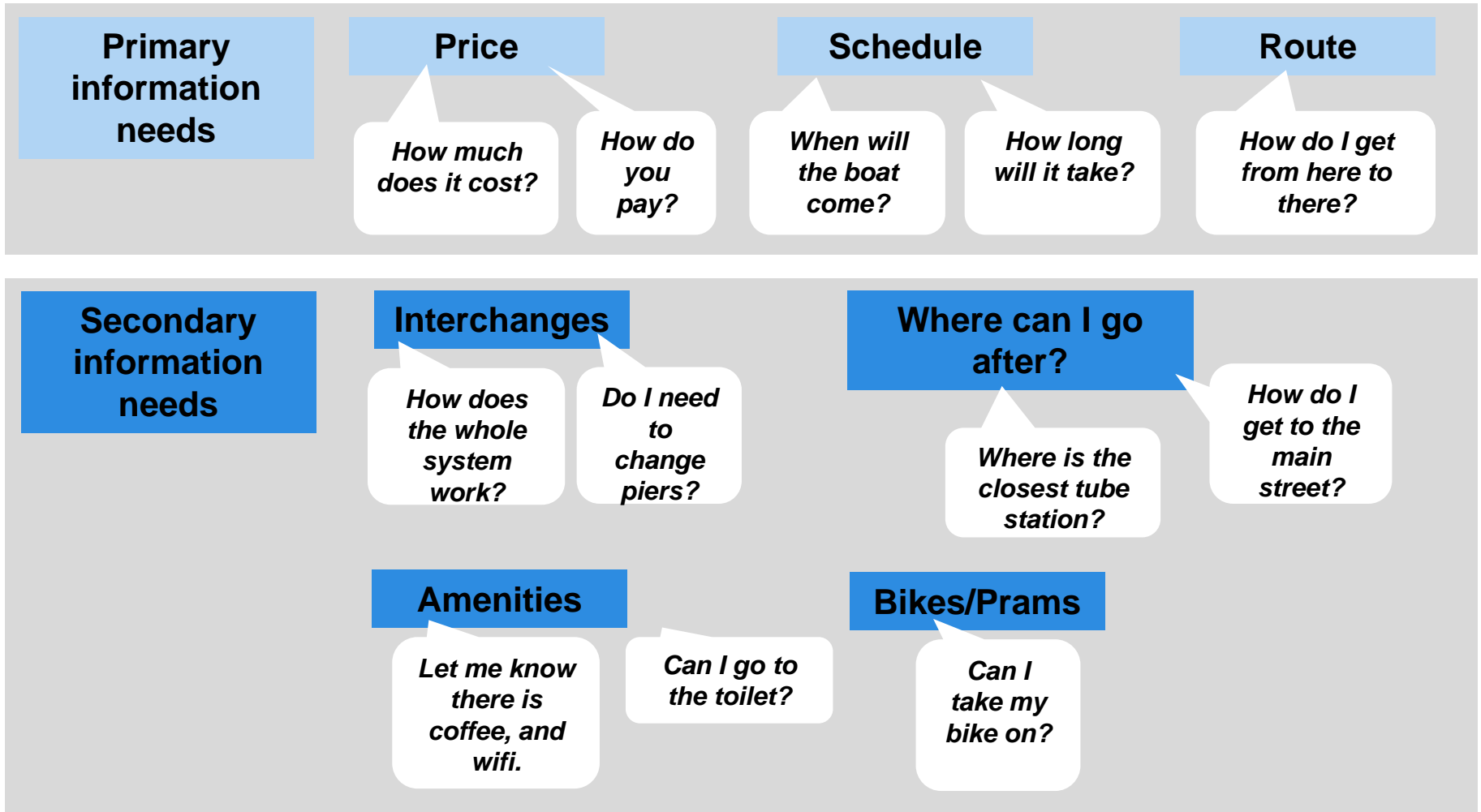
\* Not presented in hierarchy outside of primary/secondary distinction



Towards a blueprint for prioritising information needs

# As a mode of transport: Primary, secondary information needs\*

\* Not presented in hierarchy outside of primary/secondary distinction



Primary information needs: How much? Which boat? When?

# Response to schedule information

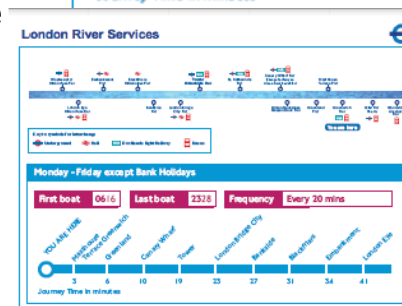
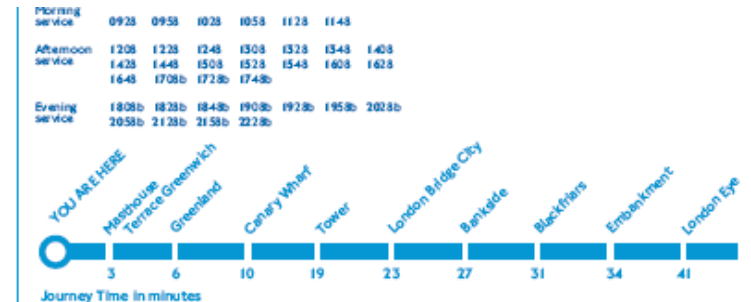


## Grid timetable (current pier information):

- × Too much information at a glance - difficult to interpret for the first time
- × Feels outdated as a way of giving schedule information
- × Not TfL branding – not immediately interpreted as being part of the core service

## Journey time in minutes (new stimulus):

- ✓ Helpful to know how long it takes for planning purposes
- ✓ Communicates regularity of service
- ✓ ‘You are here’ is specific to journey start and end point – useful at piers, and can be made interactive on the website
- ✓ Frequency communicates ‘system’ of mode – leads customer to feel it is a viable mode of transport
- ✓ Similar look and feel and content to other modes of transport



**New ideas working well to communicate the schedule information in a consistent style to other TfL modes of transport**

# Response to live departure information

**Next boat to Westminster  
via London Eye Millennium Pier**

## Dot Matrix at pier:

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- ✓ Expected for a mode of travel
- ✓ Allows for flexibility and gives reassurance to the customer
- ✓ Demonstrates how quickly boats come – no waiting and wondering how long until the next one
- × Should be positioned at multiple points of the pier
- × East vs. West is confusing - directions should always reference a specific end destination.

## Live departure information on website:

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- ✓ Communicates a reliable 'system' of transport
- ✓ Allows customer to plan their time – if used at home/work before heading out the pier
- ✓ Minimises waiting time at the pier
- ✓ Could be further extended to a mobile application

Chelsea Harbour	16:45
Cadogan	16:50
<b>Embankment</b>	17:05
Blackfriars Millennium	17:10

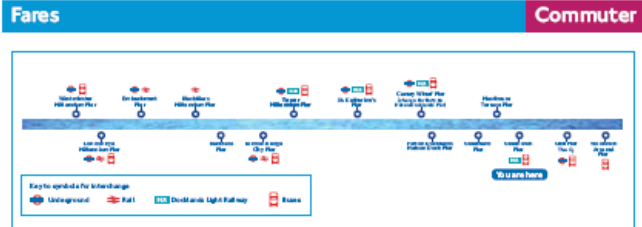
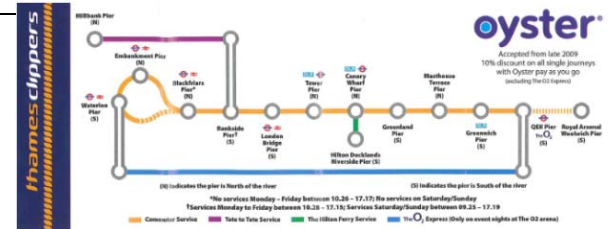
**Live departure information contributes to a sense that the service is reliable and regulated**

**Terminology of destination points benefit from more specificity than 'Eastbound and Westbound' while customers become more familiar with the routes**

# Response to route information - printed

## Z – card route

- ✓ Gives a very basic understanding of the overall system, good format
- ✗ Shows the piers names but not the route (does it stop at every pier?)
- ✗ Clipper branding makes unclear as to whether part of regular TfL service
- ✗ Only gives nearby transportation but not specific names or lines
- ✗ Names of piers do not match with local vernacular, making them difficult to locate within the context of the city. Ex: Millennium Pier refers to four different locations



## Straight route

- ✓ Over simplification is very straightforward and easy to understand
- ✗ Difficult to understand locations in context of London



## River shaped route

- ✓ Shape of the river illustrates pier location in relationship to landmarks and bridges
- ✓ Reminds user of where the River goes in London

## Suggested Improvements

- Names of piers that are not intuitively linked to location need an explanation of what is nearby (e.g. landmarks, tube or rail station names)
- There is a visual preference for route that shows the shape of the river



# Response to pricing information

## Price bands

- × 'Price bands are not specific – leads to questions around value for money
- × People expect pricing zones or a fixed cost from A → B
- × Expected to find information about travelcards/ integration with other modes

Fares – Main commuter service	
	Single fares range between
Adult	£3.20 - £5.30
Child/Freedom Pass	£1.60 - £2.65

**Fares discount**

**Oyster pay as you go**  
 Oyster pay as you go is accepted on all Thames Clippers' services and gives a 10% discount on all single journeys.



## Oyster card

- ✓ Links River Boats with TfL and other modes of transport
- × However, not integrated with other travelcards
- × Communicating pay as you go only – sets up disappointment, confusion when find out there are travelcards available

## Price by destination

- ✓ Useful detail for understanding price for specific journeys
- ✓ Expected for understanding new mode of transport
- × Would be useful to include travelcard information here

	Adult		Child/Freedom Pass Holder	
	Single	Return	Single	Return
Westminster to Kew	£12.00	£18.00	£6.00	£9.00
Westminster to Richmond	£15.50	£20.25	£7.75	£11.25
Westminster to Hampton Court	£15.50	£22.50	£7.75	£11.25
Kew to Richmond	£6.75	£10.50	£4.50	£6.75
Kew to Hampton Court	£12.00	£18.00	£6.00	£9.00
Richmond to Hampton Court	£9.00	£12.00	£4.50	£6.00

	Senior Citizen/ Student		Family Ticket (2 Adults + 2 Children)	
	Single	Return	Single	Return
Westminster to Kew	£8.00	£12.00	£30.00	£45.00
Westminster to Richmond	£9.00	£13.50	£33.75	£50.25
Westminster to Hampton Court	£10.00	£15.00	£37.50	£56.25
Kew to Richmond	£4.50	£7.00	£18.00	£27.75
Kew to Hampton Court	£8.00	£12.00	£30.00	£45.00
Richmond to Hampton Court	£6.00	£8.00	£22.50	£30.00

## Suggested improvements

- Explain the price bands and how they are determined (by distance, time of day?)
- Provide specific price information as and when possible
- Oyster must be more clearly positioned as Pay as you go only – only then will discount start to be appealing

# Response to interchange and where to go next information

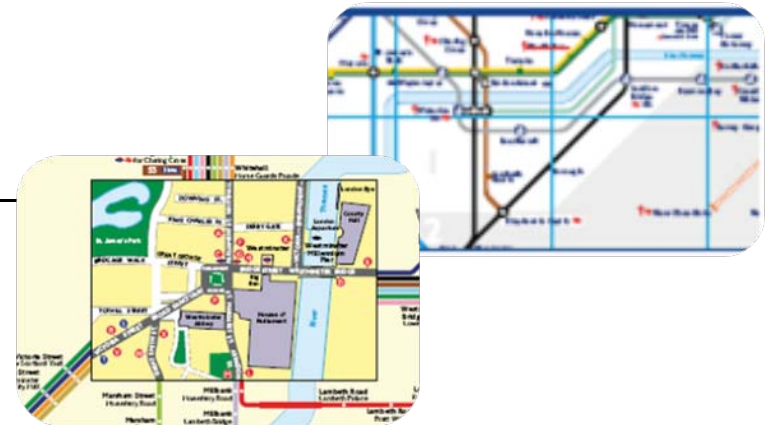


## Where to go next – Area maps

- ✓ Useful for both tourists and Londoners
- ✓ Visual of the river helps contextualise location and gives better understanding of pier location
- ✗ Walking maps are not felt to be detailed enough – difficult to know how to get from pier to tube/bus or another pier

## Interchanges – Transport maps

- ✓ Aids in the connection from river boats to other modes of transport
- ✓ Bus maps are clear and provide useful information
- ✗ Tube map overshadows river boat routes



## Suggested Improvements

- Zoom in on the surrounding area including the closest access to public transport
- Tube map specifically: Zoom in on the Thames and show greater detail about how to get between station/pier
- Place maps and interchange information at the pier as customers are walking out



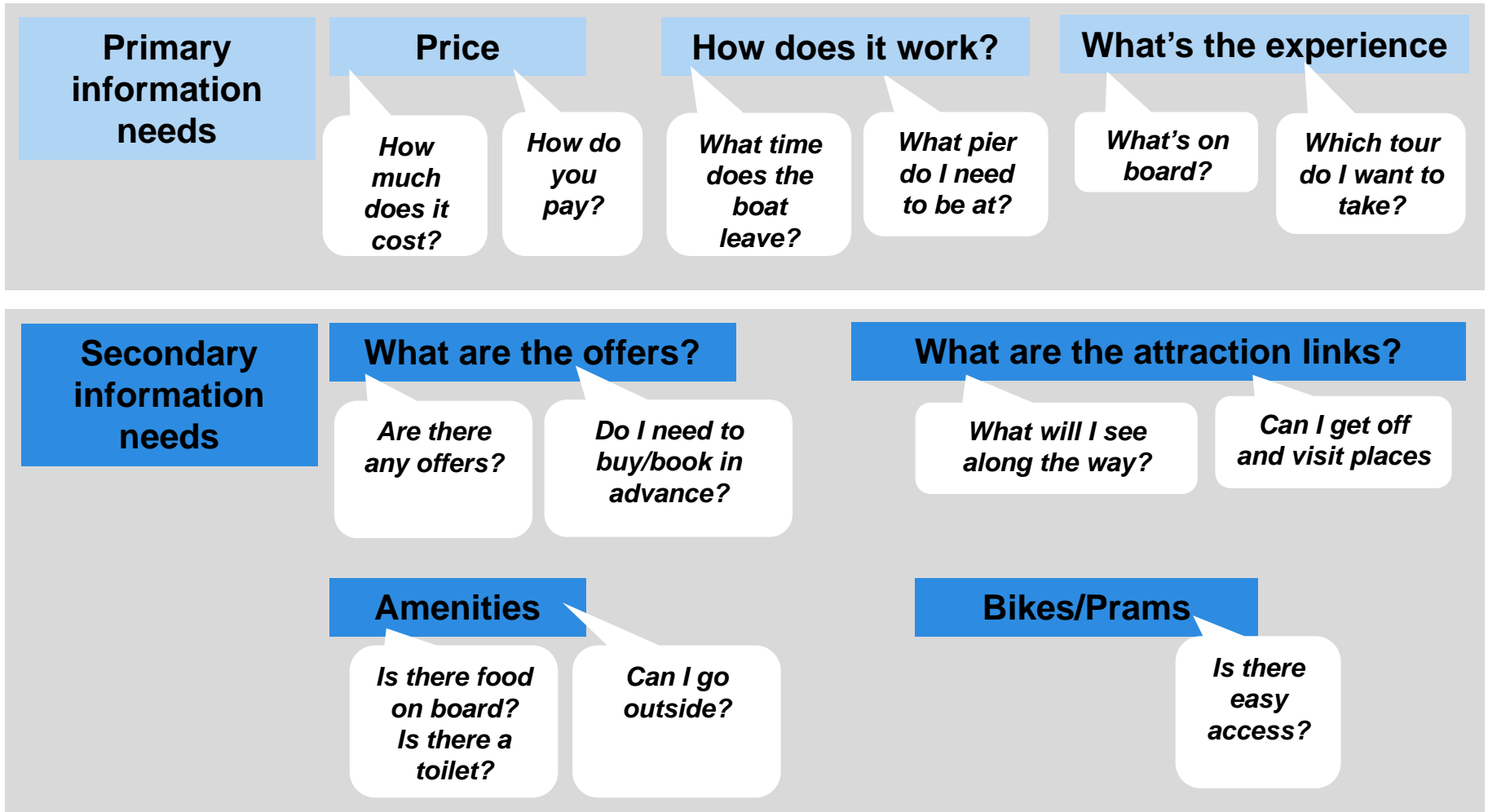
# Summary of mode of transport information needs

	Primary	Secondary
Web	Communicate primary information needs across all formats – web, Z-card and pier	Secondary information across Web and Z-card:
Z Card	Pricing: specific journey prices, travelcards, Oyster pay as you go and accompanying discounts  Schedule: emphasis on speed, reliability, timetable and consistency of information with other modes	Focus on available amenities as a counterpoint to other modes of transport - wifi, cafe/bar, free papers, toilets, bikes/prams
Pier	Route: where the piers are and landmarks, how to get from A → B	Secondary information at the pier:  Focus on interchange information and where to go next

**An information strategy in line with TfL's existing transport modes provides the necessary back up for Rivers service coming across as a viable mode of transport**

# As an experience: Primary and secondary information needs\*

\* Not presented in hierarchy outside of primary/secondary distinction



Primary information needs: How much? How does it work? What do I get?

# Summary of experiential information needs

	Primary	Secondary
Web	Communicate primary information needs across all formats – web, leaflet and pier	Secondary information across Web and leaflet:
Leaflet		Focus on available amenities in line with length of time on the tour - outdoor space, cafe/bar, toilets, prams/wheelchairs
Pier		Secondary information at the pier:  Focus on ensuring tours are differentiated and easy to identify

**Lack of detailed stimulus for experiential service and emphasis on ethnographies with potential London users provides the following overview only**

**However, many of the principles from the 'modal' use stimulus are applicable**



# The experience



# Customers for a boating experience compare the experience to other London attractions

- Boating experiences are appealing primarily to visitors, or as a secondary need for Londoners when entertaining visitors
- Planned in advance
  - Research into price, the boat, the theme, the stops along the way, amenities, how to get to the boat, timing, builds anticipation
- Then expect to turn up and see what happens
  - Expect a certain standard of experience: warm and welcoming, professional
  - Approach the pier and be greeted
  - Staff to help with questions, concerns
  - The primary need is to have an experience on the river - see iconic London landmarks
  - Secondary need is to see and hear more about the landmarks – guided tours, historical facts, personality of tour guide, etc.

*We came to the Eye and then saw the pier...didn't know about it before but think it is best way to see London quickly. – PV*

*I know I am supposed to get on the red boat. – CV*

*I like to hear what I am seeing. – CV*

*I saw the boats on sightseeing.com...I liked it a lot. – CV*

# For mode of transport use, there is a clear set of journeys when the service becomes appropriate

The service naturally lends itself to destinations that are on the river  
Potential to consider the service as an alternative form of transport that avoids the congestion of Central London

## Live or work close to the river:

- Tend to be habitual journeys
- River service could become part of multi transport mode option
- Could provide 'an enjoyable break' on total journey experience
- Potential to become a viable transport option, especially when Plan Bs are needed

## Live and work close to the river:





- Tend to be habitual journeys
- River service can be just as fast and more enjoyable than other options
- Potential to avoid public transport traffic entirely on a daily basis

## Leisure destinations on the river:

- More likely to be new journeys
- Opportunity to introduce as an option when looking up journey information
- Potential for service to become part of a nice day out – if length of journey comparable to other modes

**Opportunity to boost 'Thames river culture' through the service**

# Strengths and weaknesses of the service compared to other modes demonstrate cross-modal opportunities

Strengths against River service		Weaknesses against River service	
Direct, fast and known Coverage – not just on the river Less expensive	<b>Tube Train</b>	Rush hour – crowding Disruptions, delays, closures	 <b>Complementary or alternative modes</b>
:Can be door to door Less expensive Coverage	<b>Bus</b>	At the mercy of traffic	 <b>Not an intuitive alternative (depends on route)</b>
Door to door Can book ahead or spontaneous	<b>Taxi</b>	At the mercy of traffic Expensive	 <b>Difficult to compete on convenience, can compete on price</b>
Walking, cycling along river is enjoyable Can be faster than boat (across bridge, along river) Free and in control of time	<b>Walking Cycling</b>	Long distances Can't always walk along river Cycling on roads along river can be dangerous	 <b>Complementary or alternative modes</b>

# As a mode of transport, there are expectations for certain aspects of the service to be managed by TfL

## Areas customers expect mode of transport providers to control

- The pier and the experience
- The boat and the experience
- Information format and content\*
- Staff
- Cost
- Branding
- Terminology

TfL expected to design, manage and create awareness of certain elements

Expected as part of a TfL service

\*Information covered in previous section

## Factors that influence choice are dependent on unpredictable elements

- Alternative options
- Weather
- Time pressure
- Complexity of journey
- Mindset
- The role of other users

Unpredictable and affects choice of whether to take/not take the service in the moment

**Addressing the factors that are expected to be under TfL's control is the first port of call and can help mitigate factors that are unpredictable**



# Mode of transport, areas of perceived control: Overview of current motivations and barriers to increased usage

## Motivations

### Scheduling/time table

- Reliability: River service should not be at the mercy of traffic or disruptions
- Late hours and regular service

### Boat and river experience

- Amenities specifically positioned against other modes – bikes, prams, wheelchairs

### Staff

- Positive interactions, helpful and friendly advice

## Barriers

### Cost

- Lack of integrated cross modal price for usage

### Branding:

- Lack of clear TfL provenance

### System

- Many different companies can be confusing

### Pier

- Lack of staff on pier, intimidating environment

### Terminology

- Unintuitive language

# Mode of transport, unpredictable factors: Overview of motivations that can mitigate barriers to choice

## Motivations

Potential to use messaging on specific elements to transform barriers to choice into motivations for choice:

### **The boat and the journey experience**

- Covered: usable in temperate and unpleasant weather
- Always have a comfortable seat
- Quiet, stress free journey
- Novel

### **The reliability** of the timetable

- No traffic, not subject to delays
- Quick

### **Specific journeys**

- Simple journeys (e.g. Canary Wharf to London Bridge), hop on hop off

### **User imagery** of typical boat customer on mode of transport service

- Professional, Londoners, not tourists
- *'Like me'*