

# Bus Priorities

Report by 2CV for Transport for London

January 2020

# Contents

- 1 Background & methodology
- 2 Bus customer profiling
- 3 Bus priorities (Max Diff)
- 4 Barriers and triggers to bus use
- 5 Final thoughts



# Background & methodology

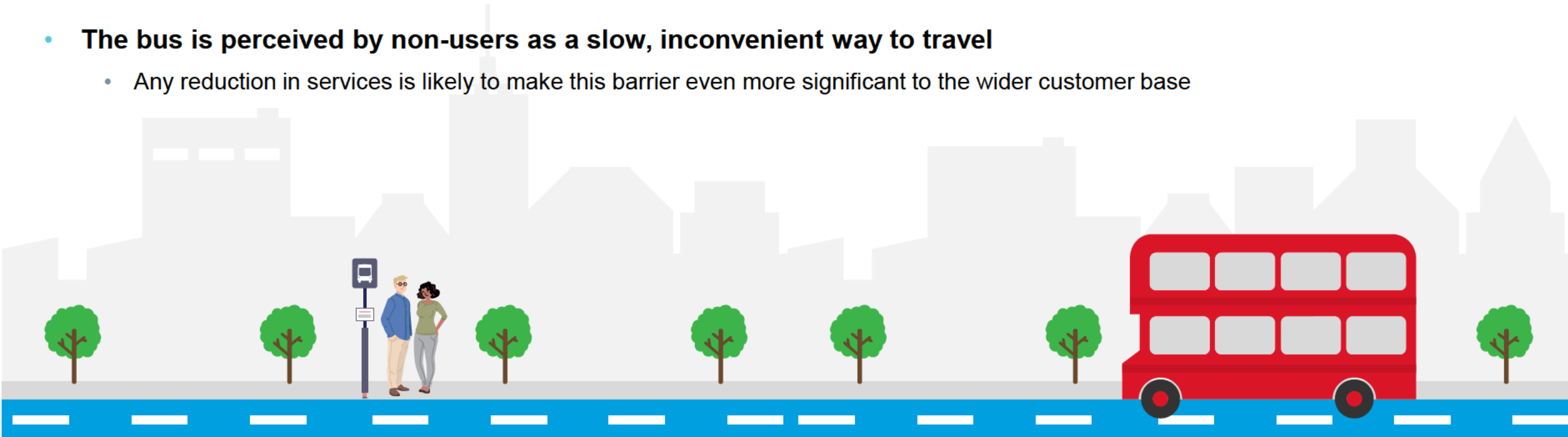
# Background & objectives

- In 2010 TfL commissioned a piece of analysis to understand which, of a number of inputs were the most important priorities for bus customers
- These outputs have allowed TfL to weight the results of their Bus Customer Experience Survey, prioritising the most important aspects of customer experience
- With a number of changes occurring over the last 10 years and against the backdrop of bus patronage declining, TfL want to ensure they have an accurate view of the priorities for bus customers
- 2CV have carried out a research project to create a new set of weights for bus priorities, and also plug a number of outstanding knowledge gaps around bus usage
- The research is designed to
  - Allow TfL to understand the order and strength of importance of bus priorities
  - Look at this across different customer groups (e.g. usage patterns, inner/outer London, commuter vs. leisure traveller)
  - Plug outstanding knowledge gaps around buses and their decline

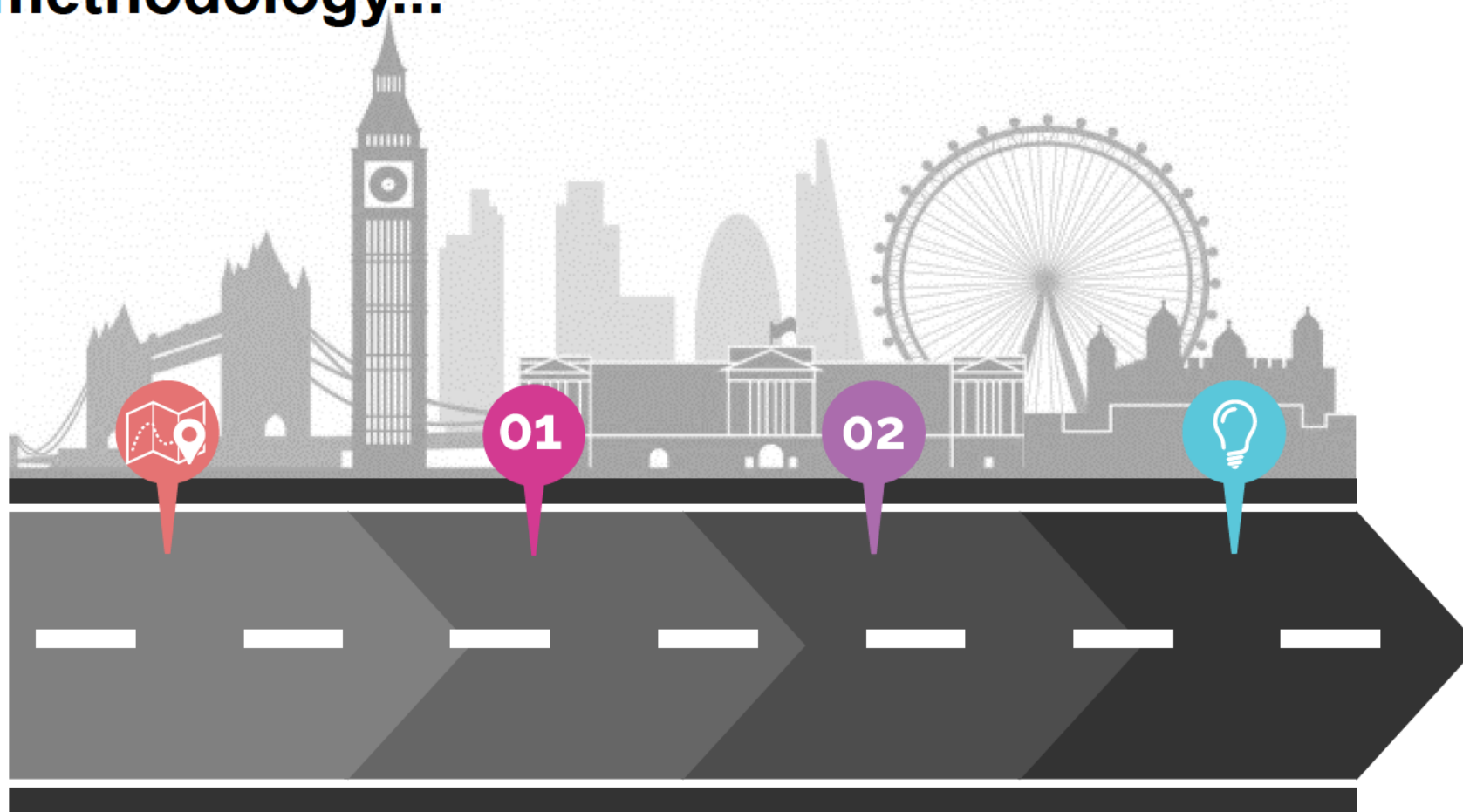


# Summary

- **Bus priorities for users and considerers alike are very consistent**
  - Customers want a frequent, regular service, where their safety is assured, offering good value for money
- **Frequent bus users choose the bus out of convenience – when it's close to their home/destination**
  - The bus struggles to compete on other elements of the travel experience, except for value
- **Those who don't frequently take the bus lack confidence in navigating the network**
  - Better information provision and support is vital, both via digital channels and from the driver
- **The bus is perceived by non-users as a slow, inconvenient way to travel**
  - Any reduction in services is likely to make this barrier even more significant to the wider customer base



# A 2 stage methodology...



## KICK OFF

Ensuring alignment between TfL and 2CV: bus priorities input list for qual phase and survey coverage for quant

## QUAL HALL TEST

Short qualitative interviews to understand priorities of customers in 2019

## QUANT SURVEY

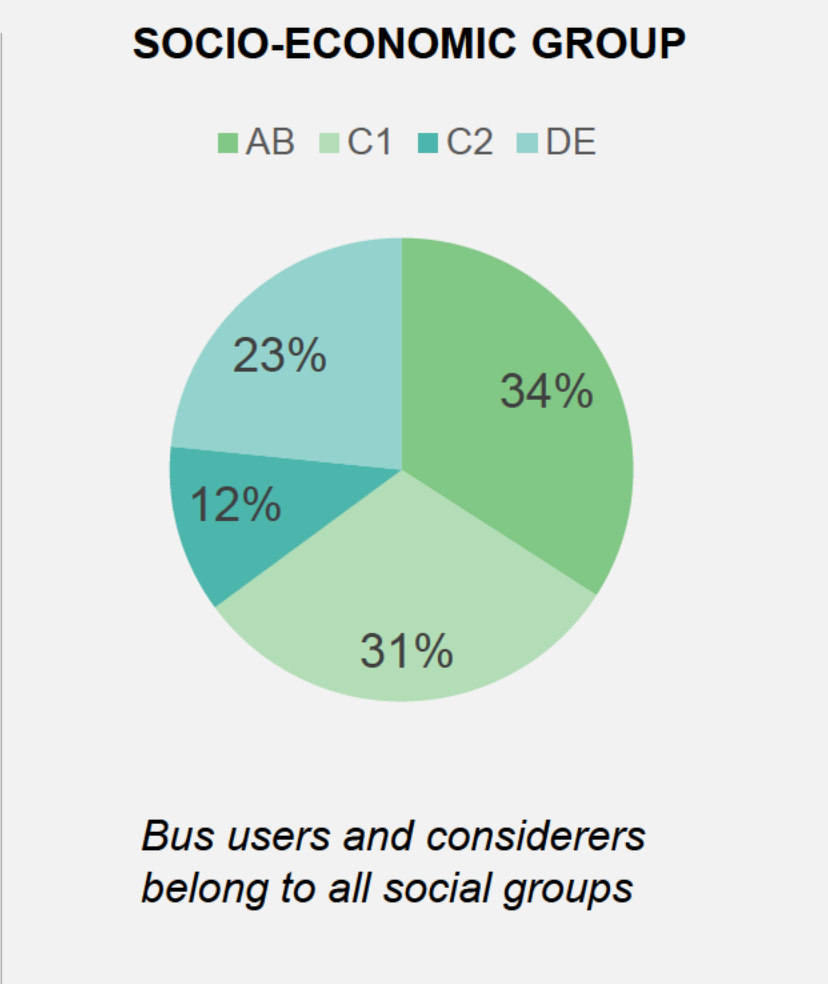
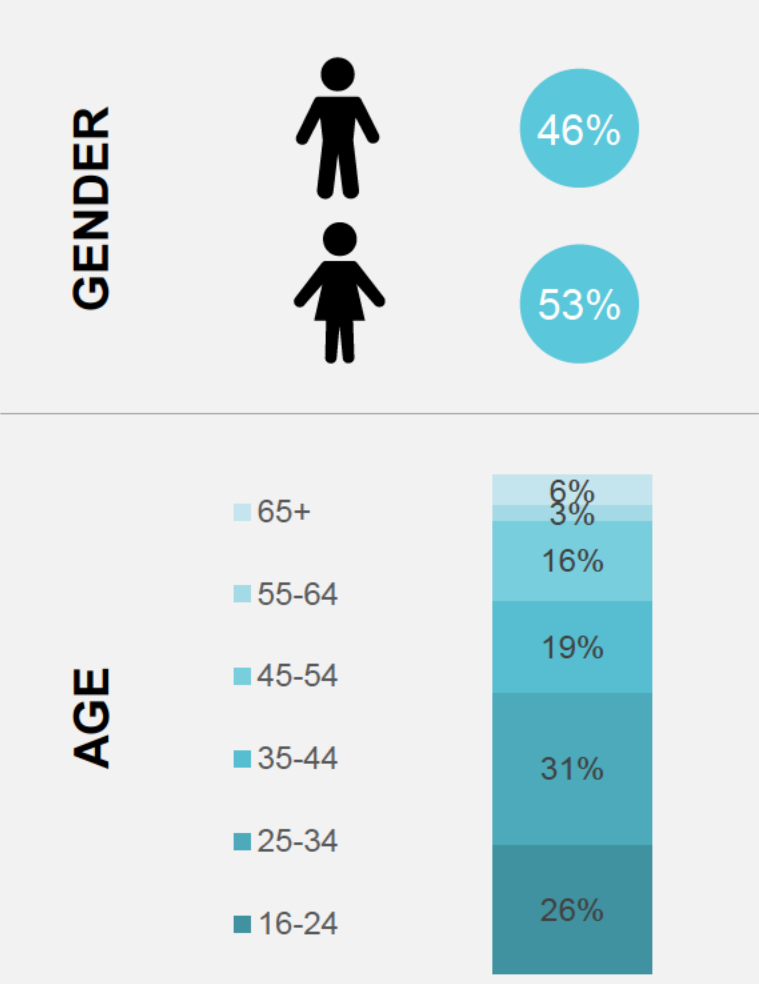
Online survey including Max Diff trade off exercise with London bus users (or considerers)

## REPORT & DEBRIEF

Including bus experience weightings and a full report

# Quantitative phase – who we spoke to

Quotas were applied on age and gender, whilst we monitored SEG and regions to ensure our respondent profile reflected real bus users. All respondents had to use or consider using the bus





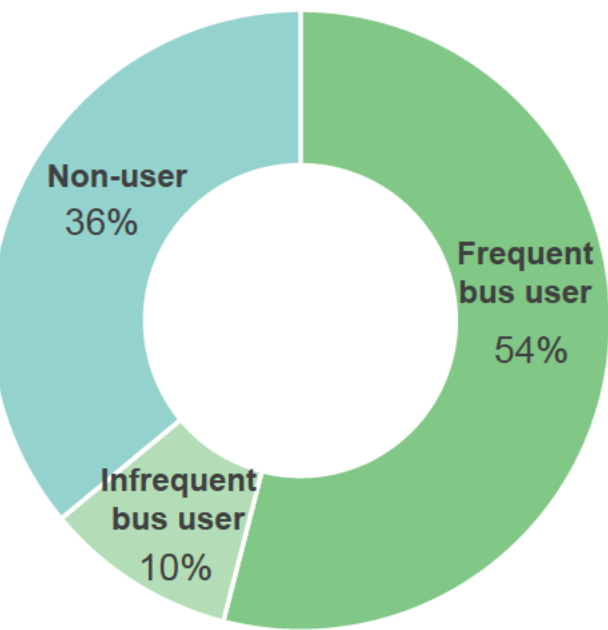
# Bus customer profiling



# About two-thirds of Londoners currently use the bus

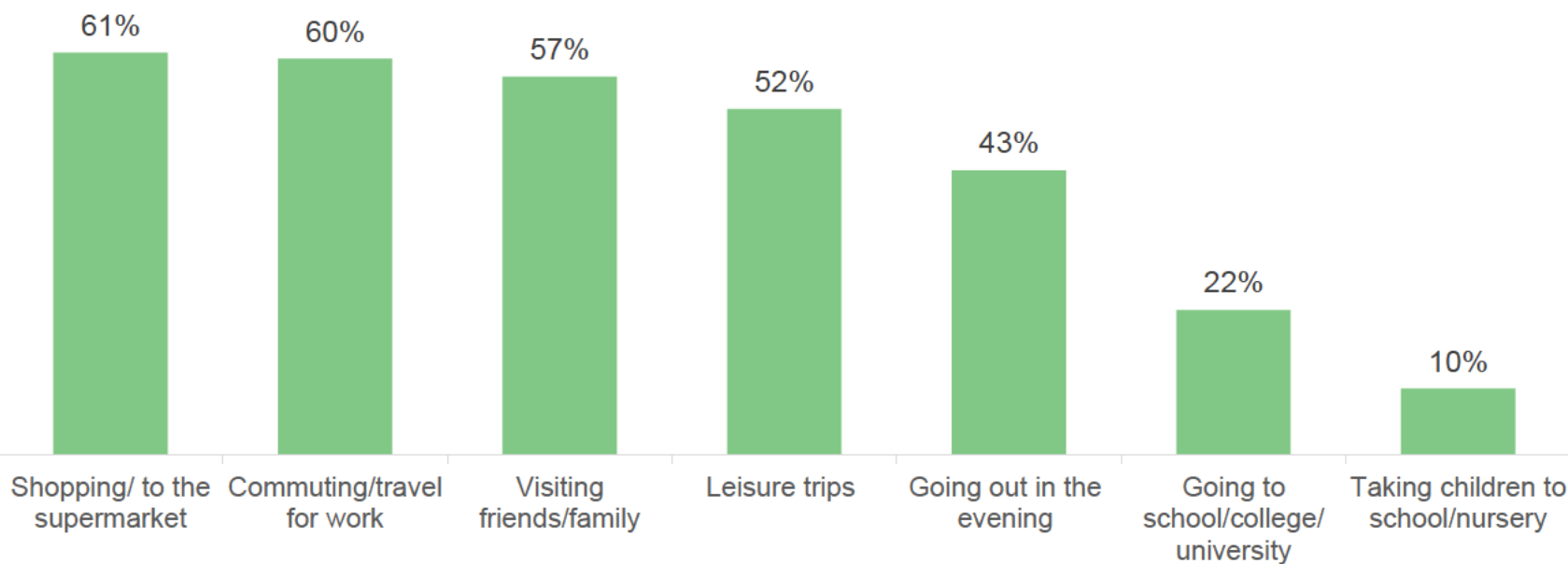
A good proportion of non-users would consider taking the bus, presenting an opportunity to further grow bus patronage. Buses are used for both practical and leisure trips

Bus usage | All respondents (London rep)\*



**27% of non-users would consider taking the bus**

Journey types taken by bus | Current bus users

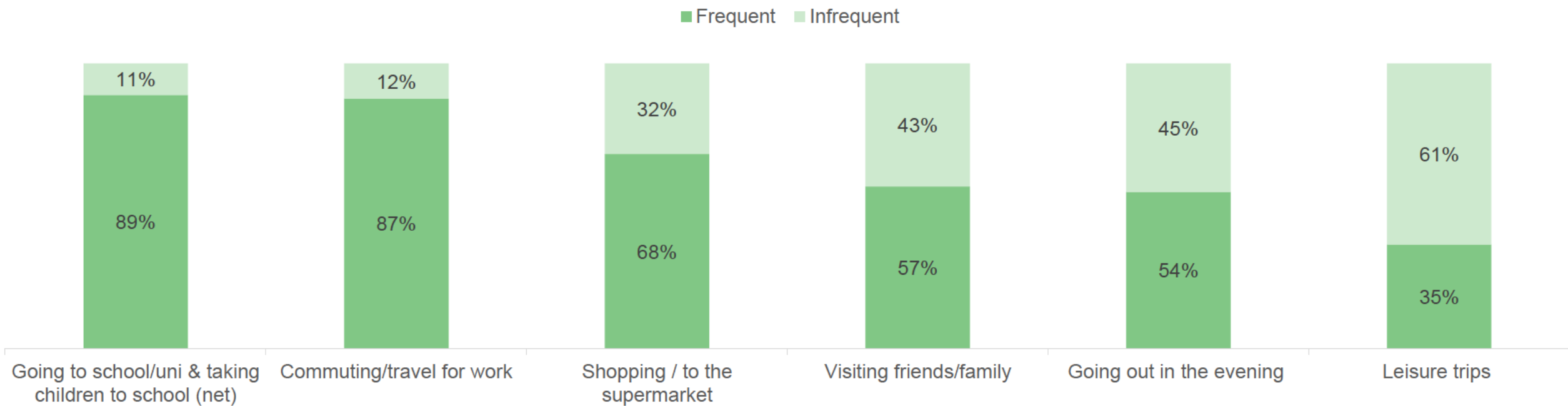


Q | SQ1. Which of these modes of transport do you ever use to get around London? A2. Which types of journey do you currently take the bus for in London?  
Base | SQ1. All respondents to screener including those screened out before full survey, weighted to London rep (709). This includes those who wouldn't consider bus to give a more accurate broad picture of penetration – note that those who wouldn't consider bus in the future are screened out before the full survey. A2. All current bus users (452) Frequent = use bus at least once a week. Infrequent = use bus fortnightly/once a month.

# The bus is a regular part of many people’s day to day work or study

People take the bus at least once a week when commuting / studying – it’s how they get around. Leisure trips are less frequent – and may also be subject to more competition from other modes

Frequency of journey types taken by bus | Current bus users who take the bus for each journey type



Q | A3. How often do you currently take a London Bus for each of these types of journey?  
Base | Current bus users who take each journey type: Going to school/uni & taking children to school [net] (107), Commuting (250), Shopping (277), Visiting friends/family (257), Going out (198), Leisure trips (242)  
\*Frequent = use bus at least once a week. \*\*Infrequent = use bus fortnightly/once a month.

# Most take the bus out of convenience, not choice

The top reason to take the bus is that it's near the point of origin or destination. This suggests that where another mode is similarly convenient, the bus struggles to compete aside from on value

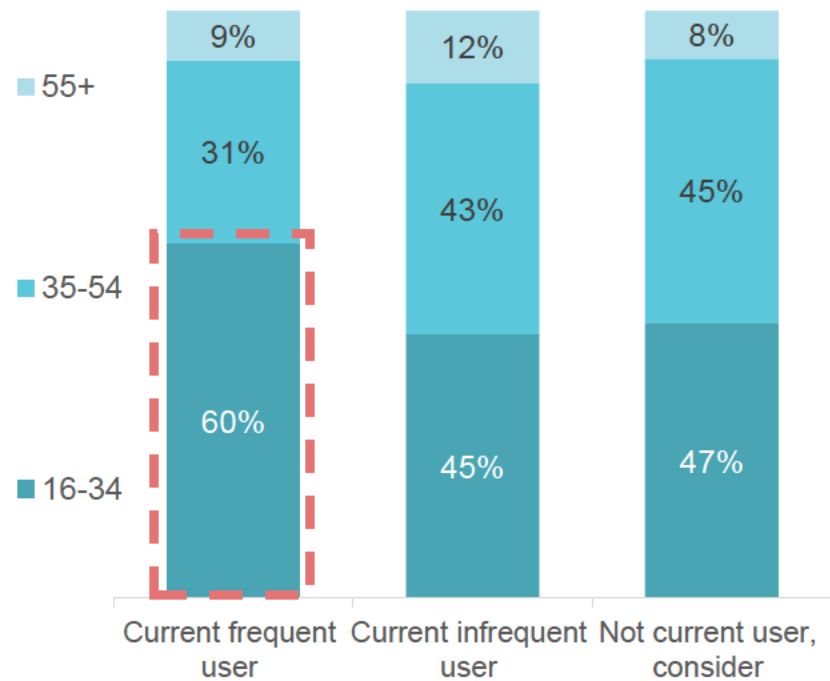
Reasons people currently use the bus frequently, Top 5 reasons shown | Current frequent bus users



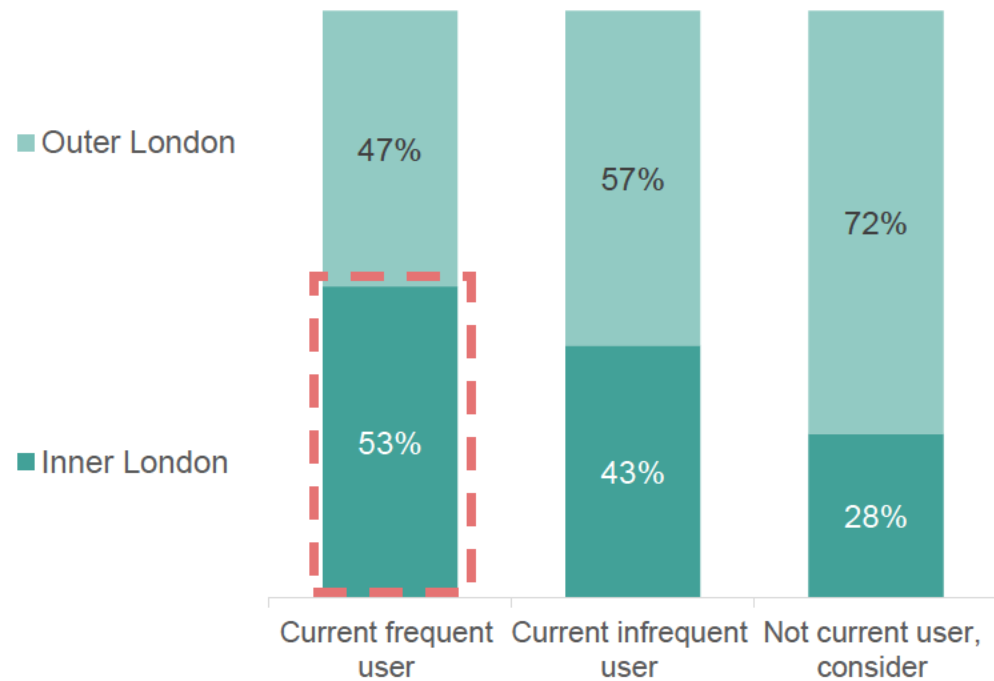
# Frequent bus users tend to be younger, inner London residents

Because bus penetration is so high, the overall profile of bus users is broad – almost everyone uses the bus at some point

Age profile | By frequency of bus use



Inner vs. outer London | By frequency of bus use, among London residents

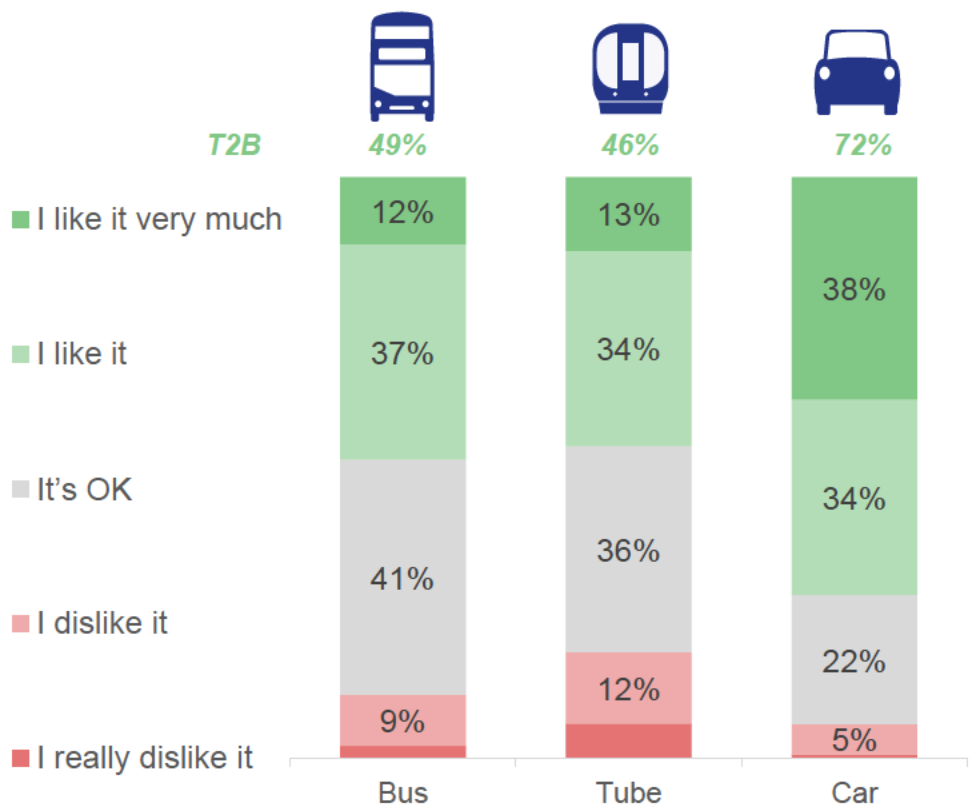


Q | AGE. And how old were you on your last birthday? REGION\_LIVE. Which of the following areas do you live in?  
Base | Current frequent\* bus users (377), current infrequent\*\* bus users (75), not current bus users but consider bus (72).  
London residents | Current frequent\* bus users (355), current infrequent\*\* bus users (72), not current bus users but consider bus (65). \*Frequent = use bus at least once a week. \*\*Infrequent = use bus fortnightly/once a month.

# Bus users like the bus on the whole – but not as much as driving

Bus enjoyment is on par with the tube, but lags far behind car – presenting a challenge to those leisure trips where people have the choice between taking their car or the bus

Enjoyment of transport modes | All respondents  
(N.B. all respondents are bus users/considerers)



A third of bus users do have a choice between their car and the bus:



of current bus users drive a private car



Q | A1. How much do you like taking the following modes of transport in London? 1-5 scale.  
Base | Respondents who use each mode: Bus (495), Tube (458), Private car (driving myself) (189)

Q | SQ1. Which of these modes of transport do you ever use to get around London?  
Base | Bus users (452)



## Bus priorities (Max Diff)

# First, a quick explainer on how to interpret Max Diff figures



## Trade off

The Max Diff methodology trades each individual factor off against all the others, by asking respondents to **directly compare them** against each other.



## Share of importance

This gives each factor a % share of importance, **relative** to every other factor.

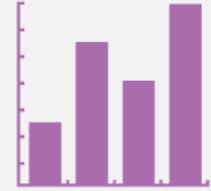
All the shares will always add up to a total of **100%**.



## “Expected” importance

As there are 30 factors in the set, if all factors were equally important then each one would have an importance share of **3.33%**.

Therefore, any factor with **more** than 3.33% share can be seen as more relatively important, and any factor with **less** than 3.33% share is less relatively important.



## Scores are relative

If one factor has a score of 6%, and another has a score of 3% - then the first factor is **twice as important** as the second.

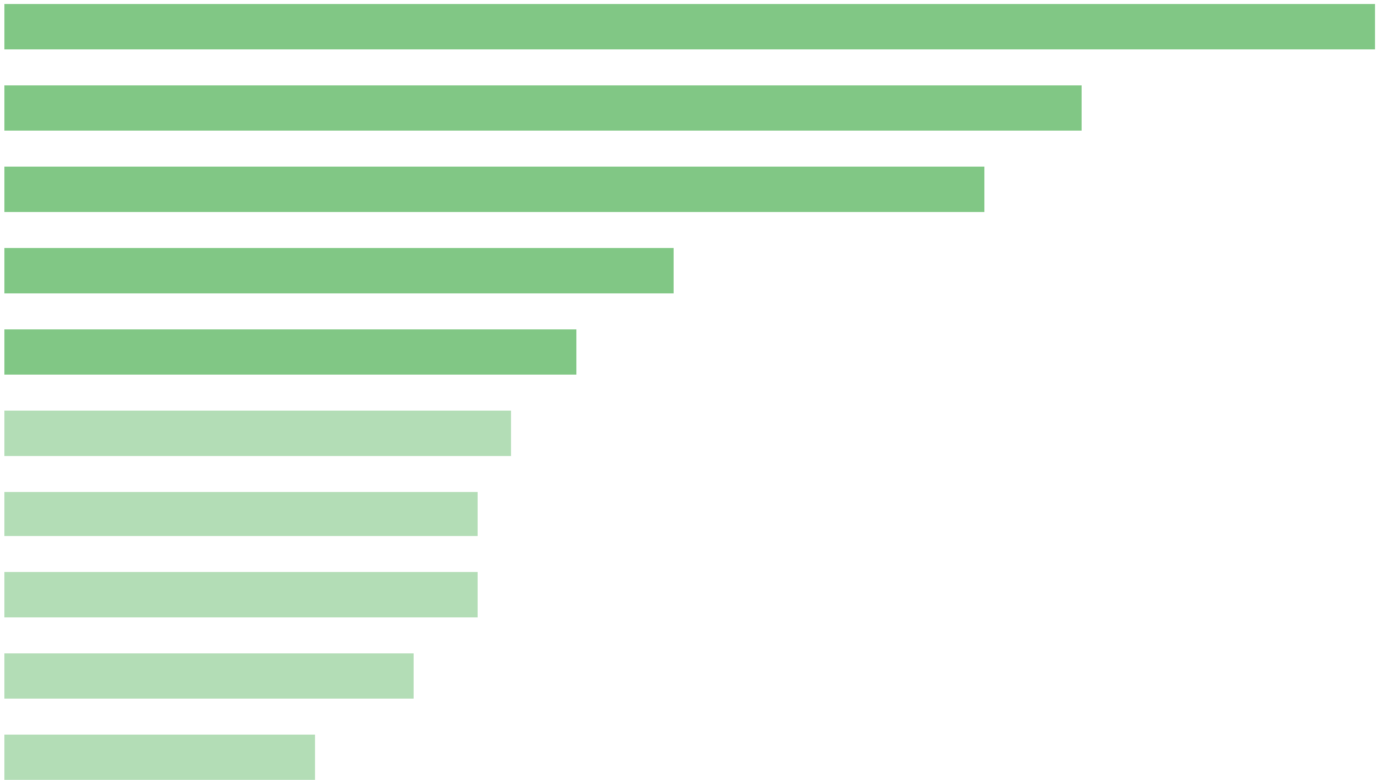
It **doesn't** mean that the second factor isn't important at all – just that it is less important, relative to the first.

# Comparing the results to 2010

The list of statements, the respondent sample and the methodology differ, so a direct statistical comparison is not possible. However, key themes have been drawn out where relevant

Throughout the rest of this section, blue callouts note where we have noted a significant change or a consistency vs. the previous study conducted in 2010

vs. 2010





# 3 key areas stand out, with importance shares far above expected

These are the basic hygiene factors of bus travel: people expect a reliable service, that gets them to their destination safely, at a reasonable price

Share of importance | All respondents

**FREQUENCY** (8.4%)

**SAFETY** (6.6%)

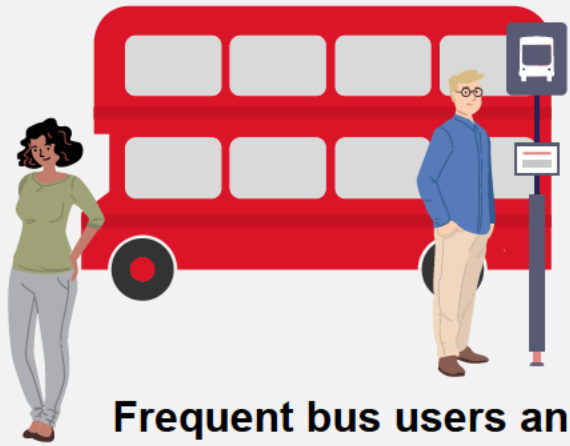
**VALUE** (6.0%)

Safety has remained consistently very important



# These 3 factors are the most important to a wide range of people

Frequency, safety and value are key to all



**Frequent bus users and those who don't use the bus**



**Men and women**



**Inner and outer Londoners**



**People travelling alone or with others**

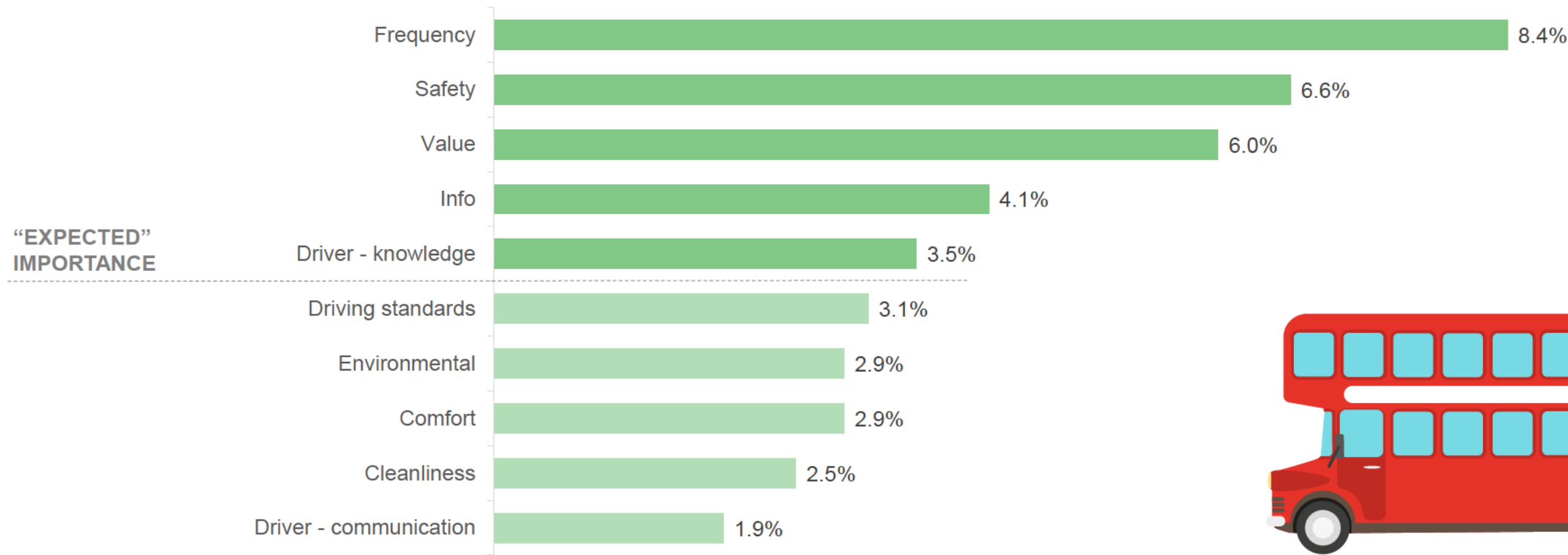


**Commuters, shoppers and those visiting friends**

# 5 themes have above “expected” importance in delivering a good bus experience

After frequency, safety and value, information and the driver’s level of knowledge come next

% importance share; average score of factors within each theme | All respondents

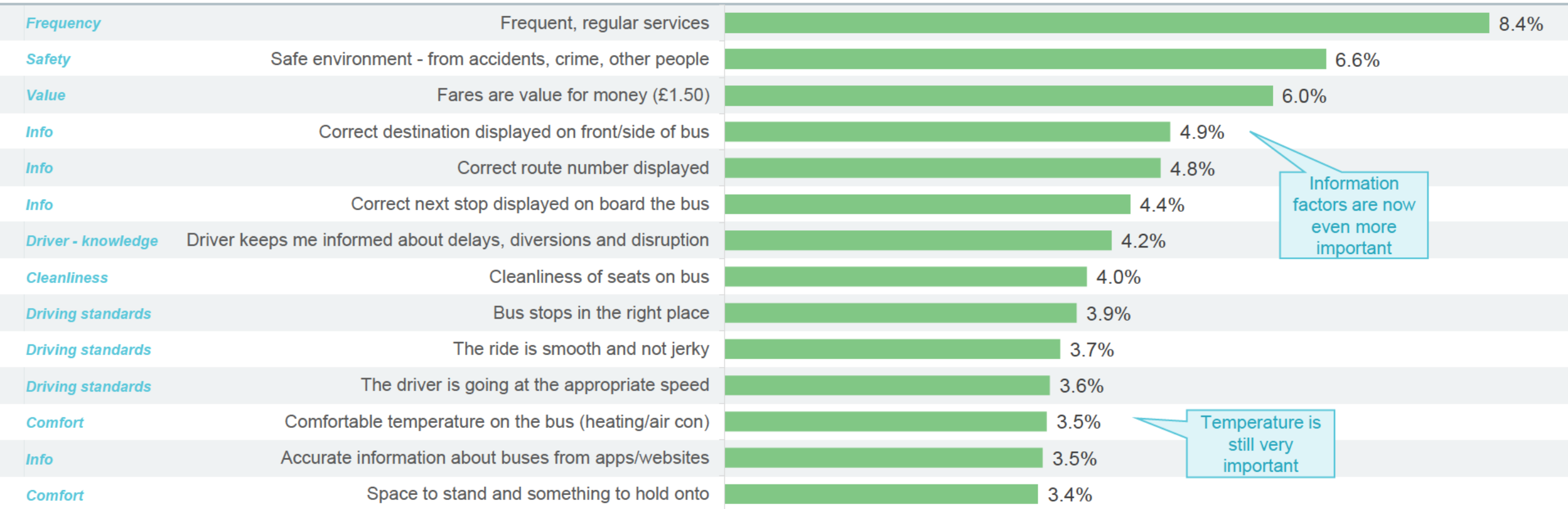


# Focusing on the factors with above “expected” importance...

Certain fundamental driving standards and comfort/cleanliness factors do carry weight with customers

% importance share; Only factors with above “expected” importance shown | All respondents

## THEME



Q | MAX DIFF. Over the next few screens we'll show you a number of sets of options, each containing 4 different elements related to bus travel. Within each set of options, we will be asking you to pick the ONE element that is MOST important to you, and the ONE that is LEAST important to you. MDANC1. Which of the following do you actually find important in delivering a good bus experience?

Base | All respondents (524)

# The following factors are relatively less important

This doesn't mean they aren't important at all to consumers, but they are less fundamental in delivering a good bus experience

% importance share; Only factors with below “expected” importance shown | All respondents

## THEME

Environment	Green, environmentally friendly bus	2.9%
Driver - knowledge	Driver is knowledgeable about the route	2.8%
Info	Accurate audio announcements on board the bus	2.8%
Comfort	Condition of seats (e.g. fabric not torn)	2.7%
Cleanliness	Cleanliness and condition of bus floors	2.6%
Cleanliness	Level of litter on the bus	2.6%
Driver - communication	Driver communicates clearly	2.4%
Driving standards	Driver opens doors at the right time	2.4%
Driver - communication	Driver is helpful	2.2%
Driver - communication	Driver has a polite manner	2.1%
Comfort	Space for wheelchair/buggy	1.9%
Driving standards	Bus stops close enough to the kerb	1.8%
Cleanliness	Cleanliness and condition of panels and ceilings	1.6%
Cleanliness	Cleanliness of windows on bus	1.5%
Driver - communication	Driver announcements about making space/moving down inside	1.5%
Driver - communication	Driver acknowledges me when I board the bus	1.2%

Driver politeness was perceived as more important in 2010

Q | MAX DIFF. Over the next few screens we'll show you a number of sets of options, each containing 4 different elements related to bus travel. Within each set of options, we will be asking you to pick the ONE element that is MOST important to you, and the ONE that is LEAST important to you. MDANC1. Which of the following do you actually find important in delivering a good bus experience?

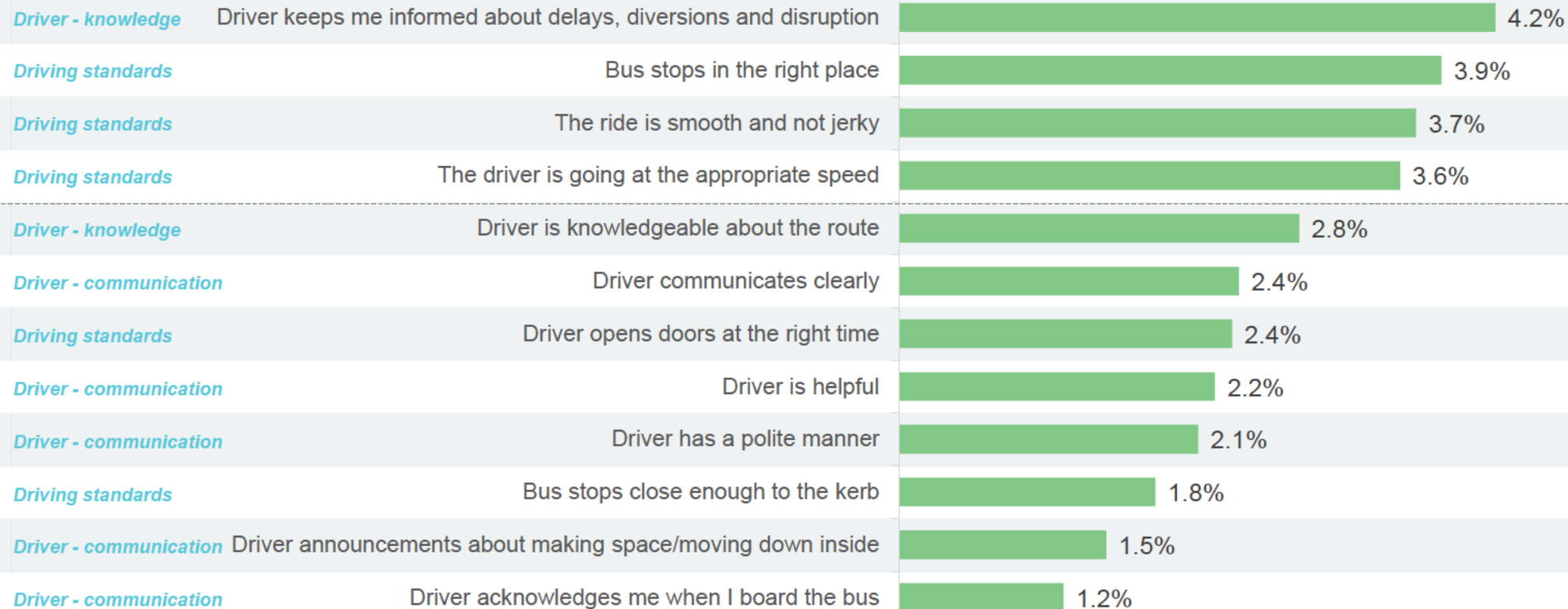
Base | All respondents (524)

# Focusing on the driver's role, comms and a safe ride are key

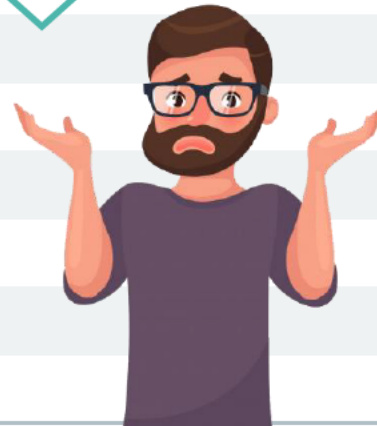
A positive and helpful attitude is more of a 'nice to have'. The way the driver communicates diversions has a more significant impact on customer journeys

% importance share; Only driving/driver factors shown | All respondents

## THEME



"Route changes are annoying already, but **when the information about that change isn't that good** then it becomes even more annoying and problematic"



Q | MAX DIFF. Over the next few screens we'll show you a number of sets of options, each containing 4 different elements related to bus travel. Within each set of options, we will be asking you to pick the ONE element that is MOST important to you, and the ONE that is LEAST important to you. MDANC1. Which of the following do you actually find important in delivering a good bus experience?

Base | All respondents (524)

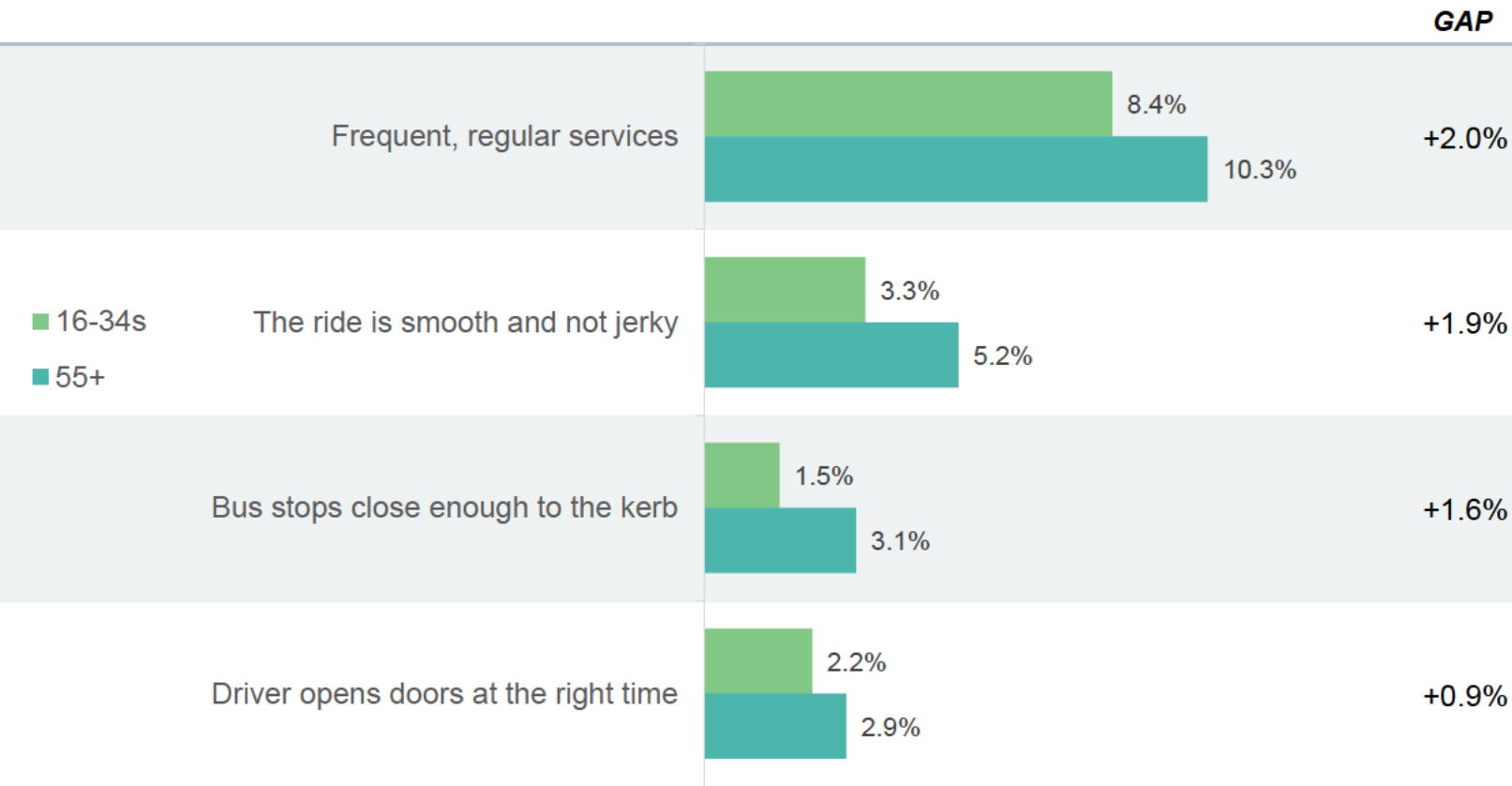


## Max Diff - Importance across key subgroups

# Reduced mobility highlights specific needs of older people

Smooth, considerate driving could make a significant positive impact on their journey

% importance share; Only sig. more important\* factors to older people shown, ordered by gap | 16-34 vs. 55+ respondents



"The **stairs** are simply a **nightmare** for me, especially when the bus moves, because they are so steep and the hand rail so small. My life flashes before my eyes"

"Sometimes **they don't give you information about the next stop being closed until you go past it** – that's annoying because then I've got another 200 yards to walk"



Q | MAX DIFF. Over the next few screens we'll show you a number of sets of options, each containing 4 different elements related to bus travel. Within each set of options, we will be asking you to pick the ONE element that is MOST important to you, and the ONE that is LEAST important to you. MDANC1. Which of the following do you actually find important in delivering a good bus experience?

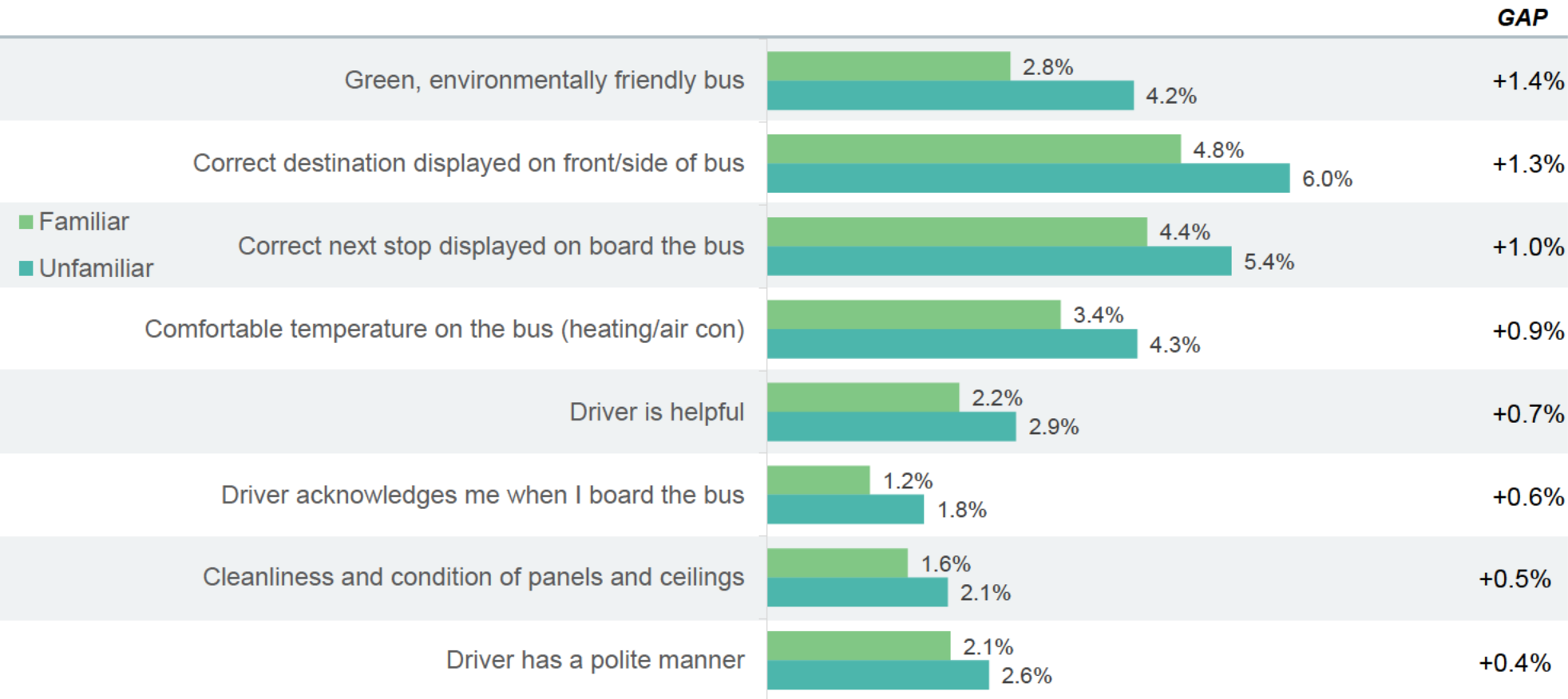
Base | 16-34s (284), 55+ (119) \*Index of 120+ vs. importance share for total respondent base



# Those on unfamiliar journeys also require more support

People on unfamiliar journeys look for a friendly, helpful attitude from the driver, perhaps because they need to have a longer interaction

% importance share; Only sig. more important\* factors to those recalling unfamiliar journeys shown, ordered by gap | Familiar vs. unfamiliar



**"I'm not confident enough to ask drivers for help or information, as I've had bad experiences of it in the past, when they've been really **abrasive** and **off-putting**"**



Q | MAX DIFF. Over the next few screens we'll show you a number of sets of options, each containing 4 different elements related to bus travel. Within each set of options, we will be asking you to pick the ONE element that is MOST important to you, and the ONE that is LEAST important to you. MDANC1. Which of the following do you actually find important in delivering a good bus experience?

Base | Those recalling familiar journeys (406), Those recalling unfamiliar journeys (46) \*Index of 120+ vs. importance share for total respondent base

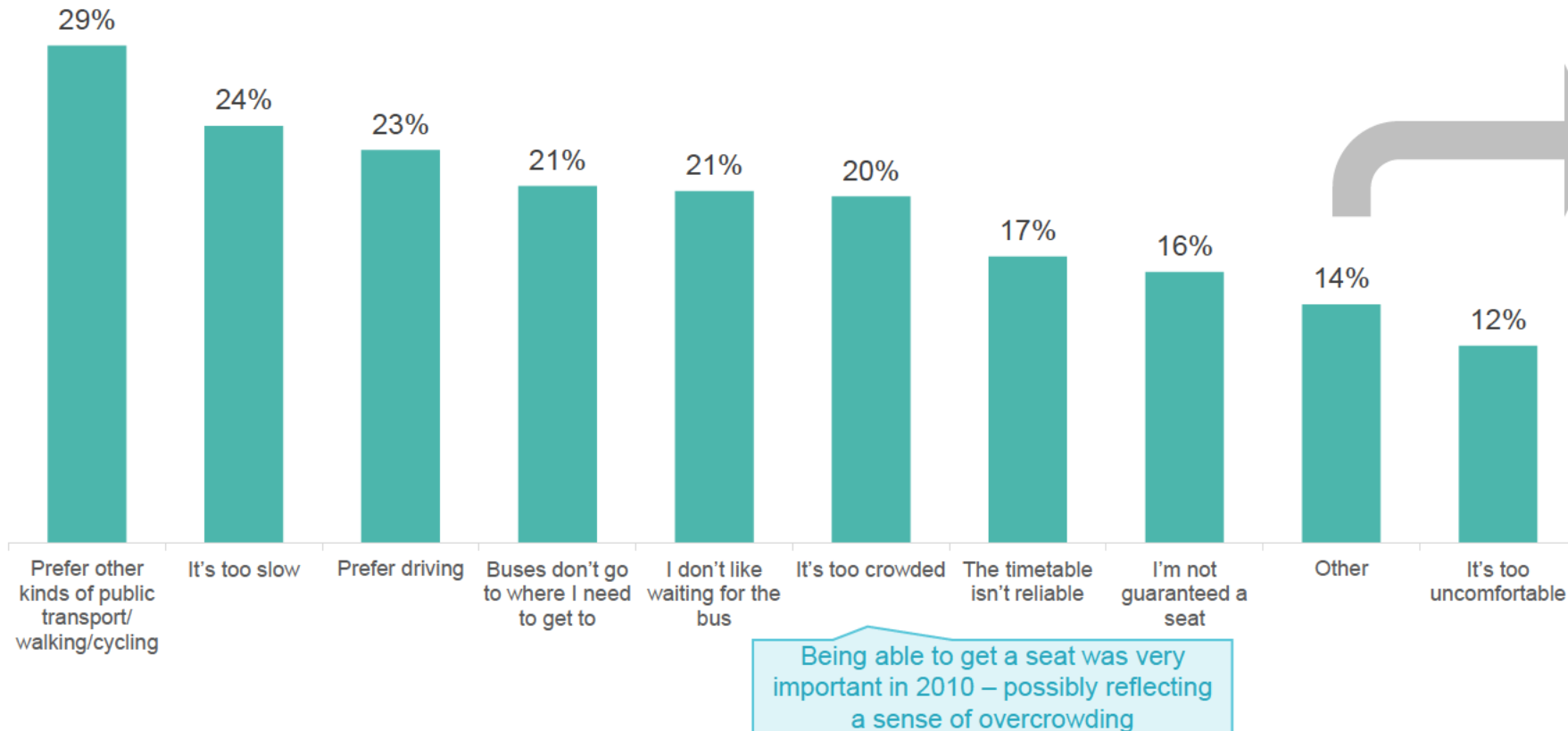
A large, light blue arrow pointing to the right, positioned on the left side of the slide.

# Barriers to bus use

# Most prefer other kinds of public transport, or driving

Speed and inconvenience cause particular issues – there is a sense of having to wait for a long time and not being able to rely on the bus

Reasons to not currently take the bus/only take it infrequently, Top 10 reasons shown | Infrequent and non-bus users



Selected 'Other' comments

"I don't always feel safe late at night"

"Movements make me ill"

"Some bus drivers are rude and I have twice had them close the doors on me"

"The petrol fumes give me travel sickness"

# Despite safety being crucial, people doubt TfL's ability to manage it

Respondents feel that TfL has a limited ability to protect their safety when it is put at risk from other passengers. The environment of the bus is felt to be relatively unregulated

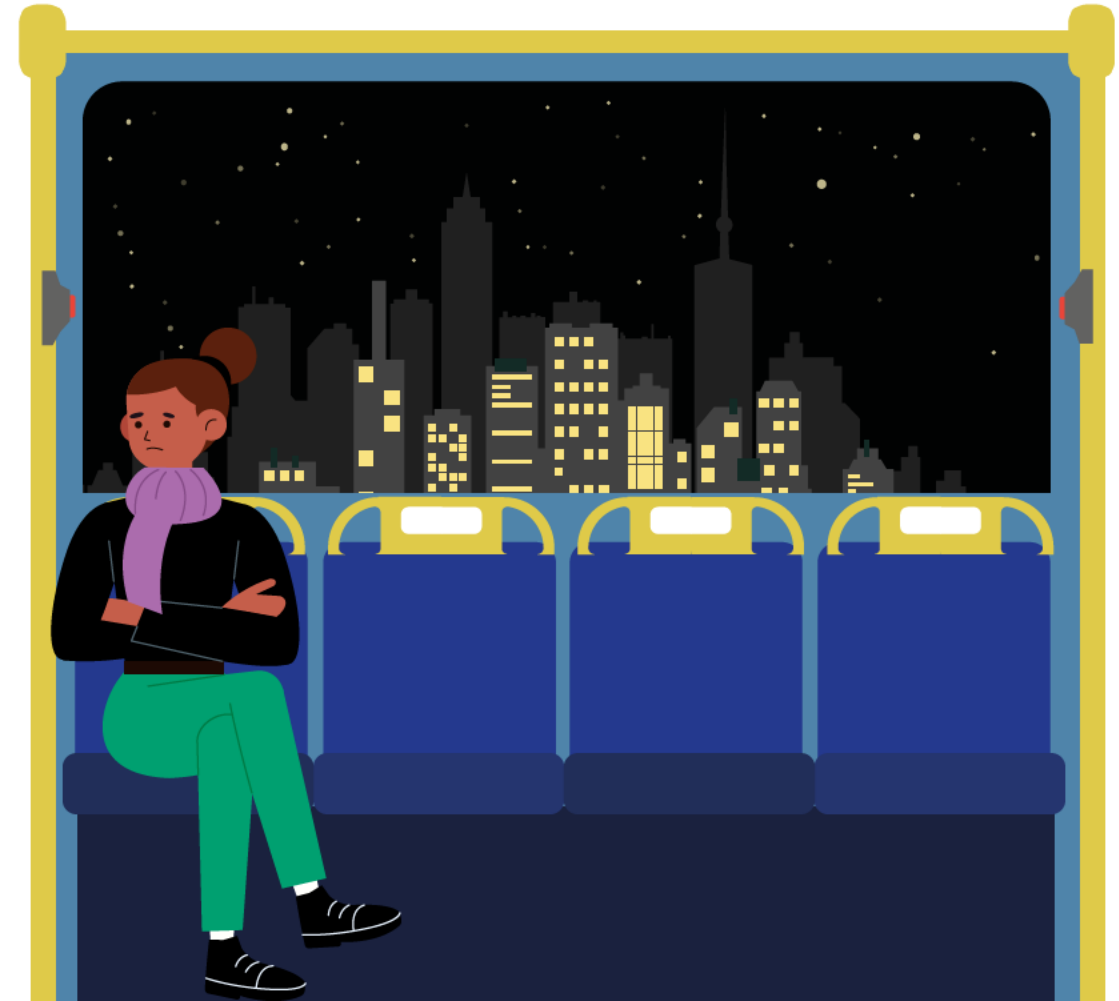
## SAFETY



"It's usually **nothing to do with the bus**, it's usually to do with other passengers, if someone is aggressive or something"

"[Safety] is very important to me but **how are you going to control it?** I don't get it"

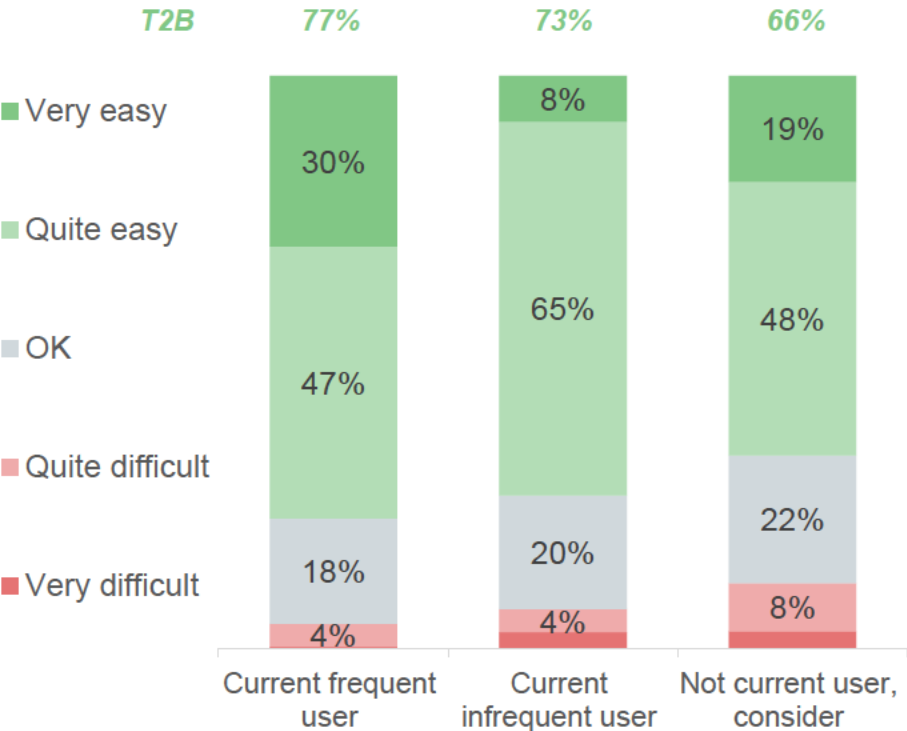
"Buses can be overcrowded and noisy but that's alright. It's **particularly late at night** if someone gets on and is drunk or something"



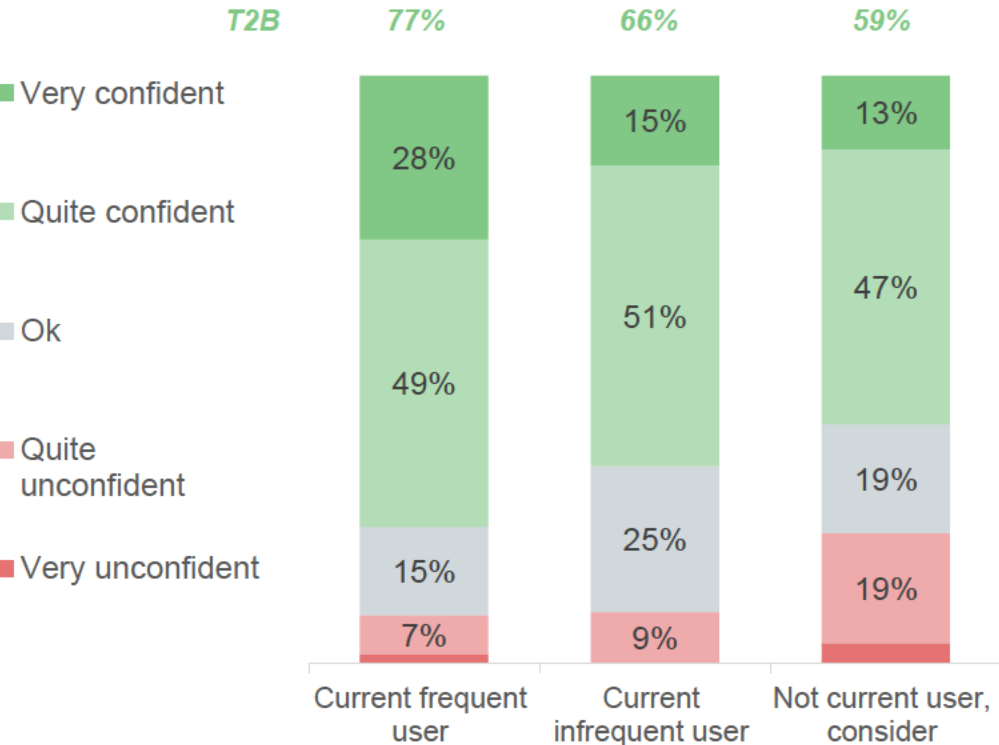
# Confidence with buses is strongly correlated to use

Frequent bus users find buses easier to understand, and feel more confident planning a new journey. For those who don't currently take buses, understanding can be a barrier

Ease of understanding/navigating buses | By frequency of bus use



Confidence to plan a new bus journey | By frequency of bus use



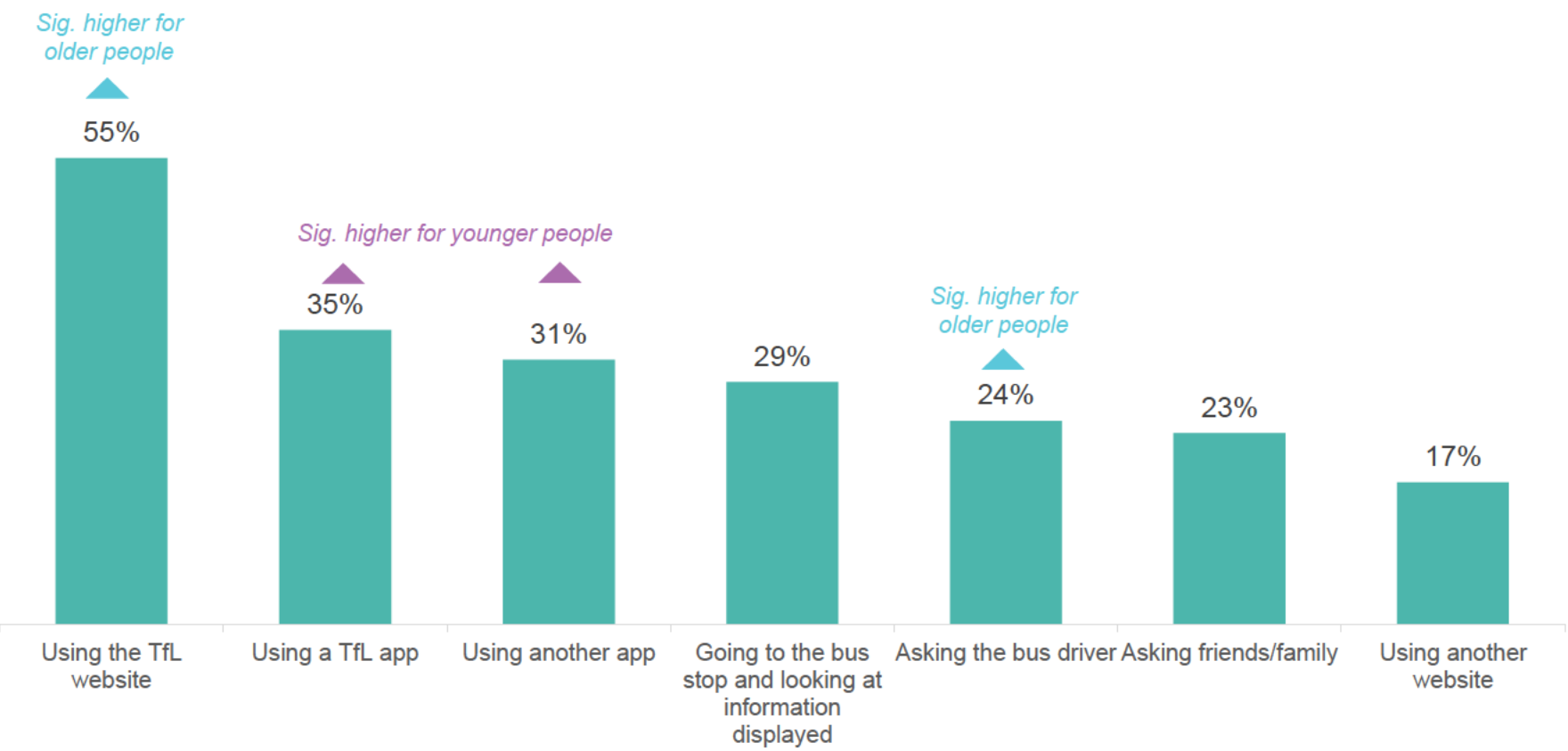
“Confused by bus numbers, bus routes and bus stop numbers”



# Accurate digital information from TfL is key to route planning

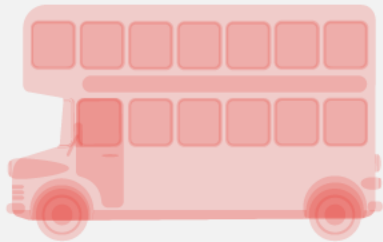
Younger people are also using non-TfL apps, making accurate open source data vital

How people would plan a route they hadn't travelled on before | All respondents



At the stop itself, digital signage is key – it's used by **52%** of people

Qual respondents expressed frustration at having “*Ghost buses*” go past, with the board updating but no bus being seen

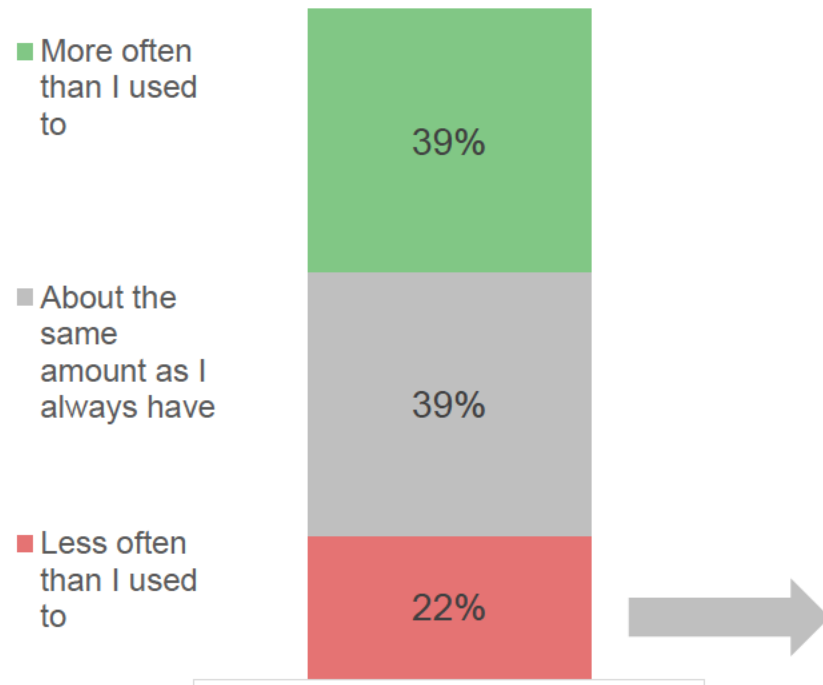


Q | D3. When thinking about using the bus, how would you plan a route you hadn't travelled on before? D4. When you are already on your journey or at the bus stop, what information sources would you use to find out when the bus is due?  
Base | All respondents (524), Respondents by age: 16-34 (287), 35-54 (121), 55+ (119).

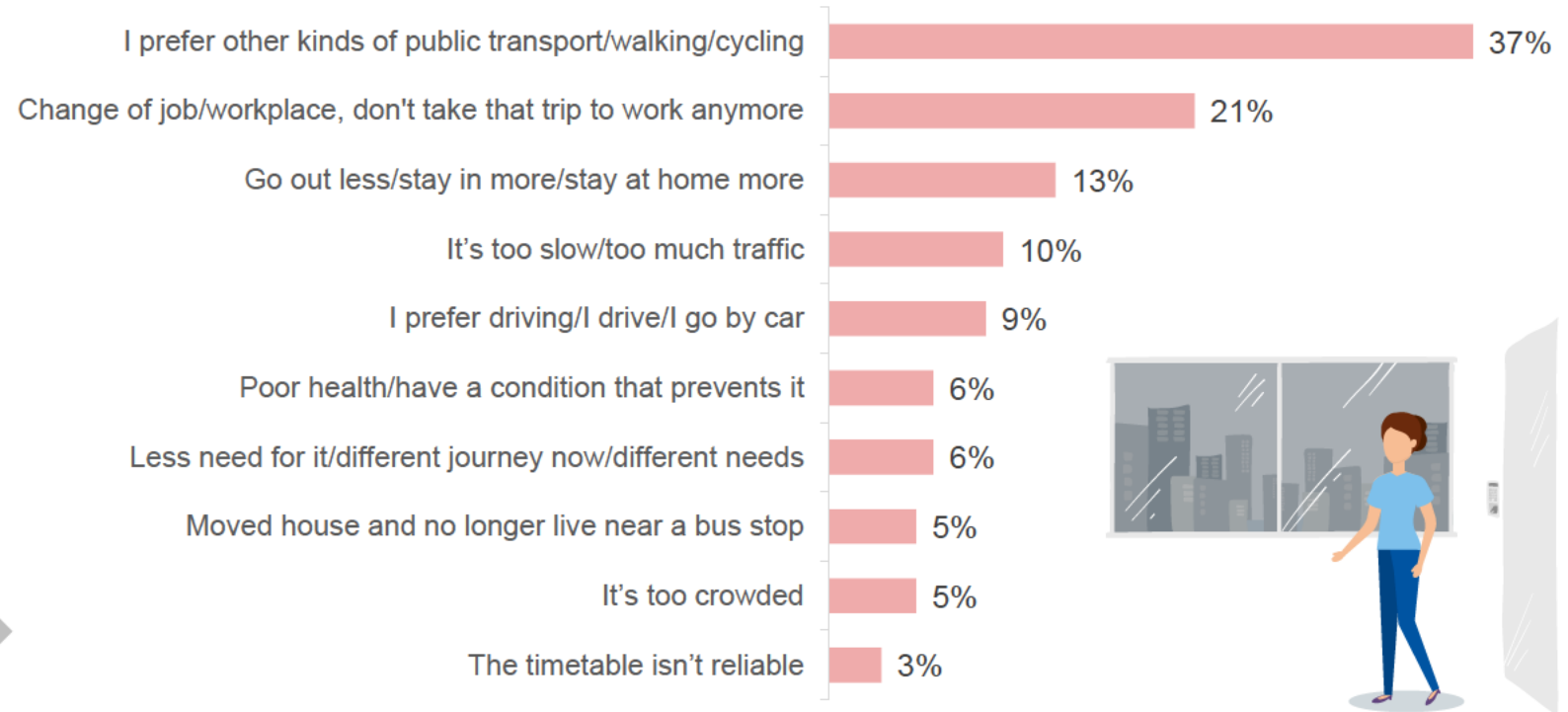
# People don't think they're taking the bus less often

Among those who say they are taking it less, this tends to be because of mode switch to either other public transport/walking/cycling or car. Some have also moved house or job or changed lifestyle

**Claimed frequency of taking bus vs. a year ago | All respondents**



**Top 10 coded open responses for why respondents are taking the bus less vs. a year ago | Those who claim to be taking the bus less**





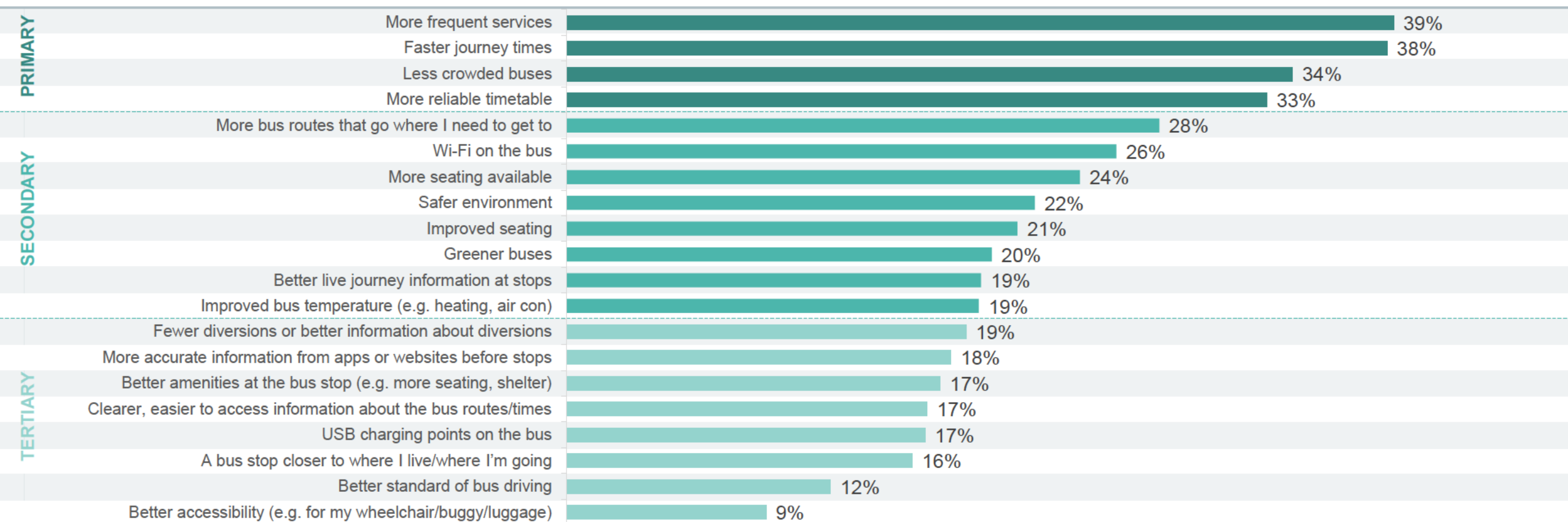
# Triggers to bus use



# Consistent with the Max Diff, a more frequent, faster service is key

Several comfort elements including overcrowding, seating and bus temperature could be improved. Respondents also quoted Wi-Fi and greener buses as reasons to travel by bus more in the future

## Triggers that would encourage people to use the bus more | All respondents






# Top triggers were relatively consistent among users and non-users




Non-bus users selected fewer triggers overall, suggesting a lack of familiarity with the bus experience and fewer existing frustrations. Frequency matters more to those who already use the bus

TOP 3 TRIGGERS

## Current frequent users

1.	More frequent services	
2.	Faster journey times	
3.	More reliable timetable	

## Current infrequent users

1.	More frequent services	
2.	Faster journey times	
3.	Less crowded buses	

## Not current user, consider

1.	Faster journey times	
2.	Less crowded buses	
3.	More bus routes that go where I need to get to	

A large, light blue arrow pointing to the right, composed of several overlapping geometric shapes, serving as a background for the title.

# Final thoughts

# Final thoughts – Top 3 priorities

## 1. FREQUENCY

Frequency and patronage go hand in hand. Additional services are welcomed; any reduction risks putting off current customers

## 2. SAFETY

Assess whether further safety measures can be made – and dial up communication around these

## 3. VALUE

Value is the key competitive advantage of the bus, and should be sustained and communicated widely





# Thank you

 [2cv.com](#)

 [2cv.com](#)

 [2cv.com](#)

Please click on this link to access our  
[Terms and Conditions](#)

