



# Improving Bus market share

Research debrief

March 2019

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# Context

# Research objectives



## Business question

How can we increase the market share of the bus?

- Getting people to use it more often
- Attracting long-lapsed or “never” users of the bus



## Research objectives

- Explore spontaneous perceptions of the bus and factors that influence choice
- Explore the bus customer experience – perceptions and reality
- Examine the place of the bus in society and culture
  - What does the bus symbolise in society? Is the bus up with the zeitgeist or behind? How does it compete with other modes?

# Our approach



Attracting long-lapsed or  
“never” users of the bus

Getting people who use the bus  
to use it more often

How can we increase the market  
share of the bus?

## **NON-USER IN HOME DEPTHS**

Six one hour depth  
interviews with non-users  
and lapsed users across  
London

*With behavioural pre-task  
to switch journey(s) to bus*



## **BUS USER FOCUS GROUPS**

Five one hour fifteen  
minute focus groups with  
current users with mix of  
preferences for bus

Grouped into Near  
Market, Middle Ground  
and Long Play boroughs



## **CULTURAL SEMIOTIC ANALYSIS**

Extensive review of bus'  
place in contemporary  
culture and society, and  
how it compares with  
other modes

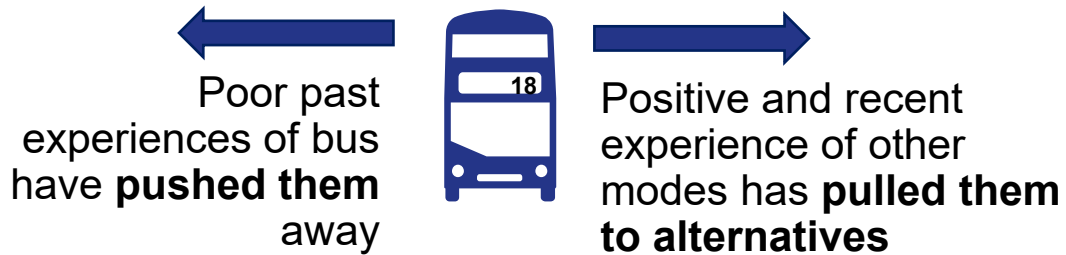
To examine the cultural  
and social significance of  
the bus

- Focus groups and depths conducted in March 2019 by 2CV.



## Attracting non-users of the bus

# The bus has lost its place in non-users' lives and they have moved on



*I used to mainly suffer the night bus for nights out, but I'd always end up feeling a mess when I arrived. The bus gets you all hot and flustered and it is not chic! Uber has been a life saver there! You can also play music to get you in the mood for where you are going.*

*When you start to drive, it's a new experience, a life skill and it's so much more convenient than the bus. I have my own space, music, food and I am in control. I see buses every day, but I do not think about them.*

"Bus is not relevant for me or a good fit for my needs"

- For some non-users, the bus is at odds with how they see themselves as individuals (or how they want others to see them)

*I felt like I wanted to tell people on the bus – I have a car you know! I felt embarrassed.*

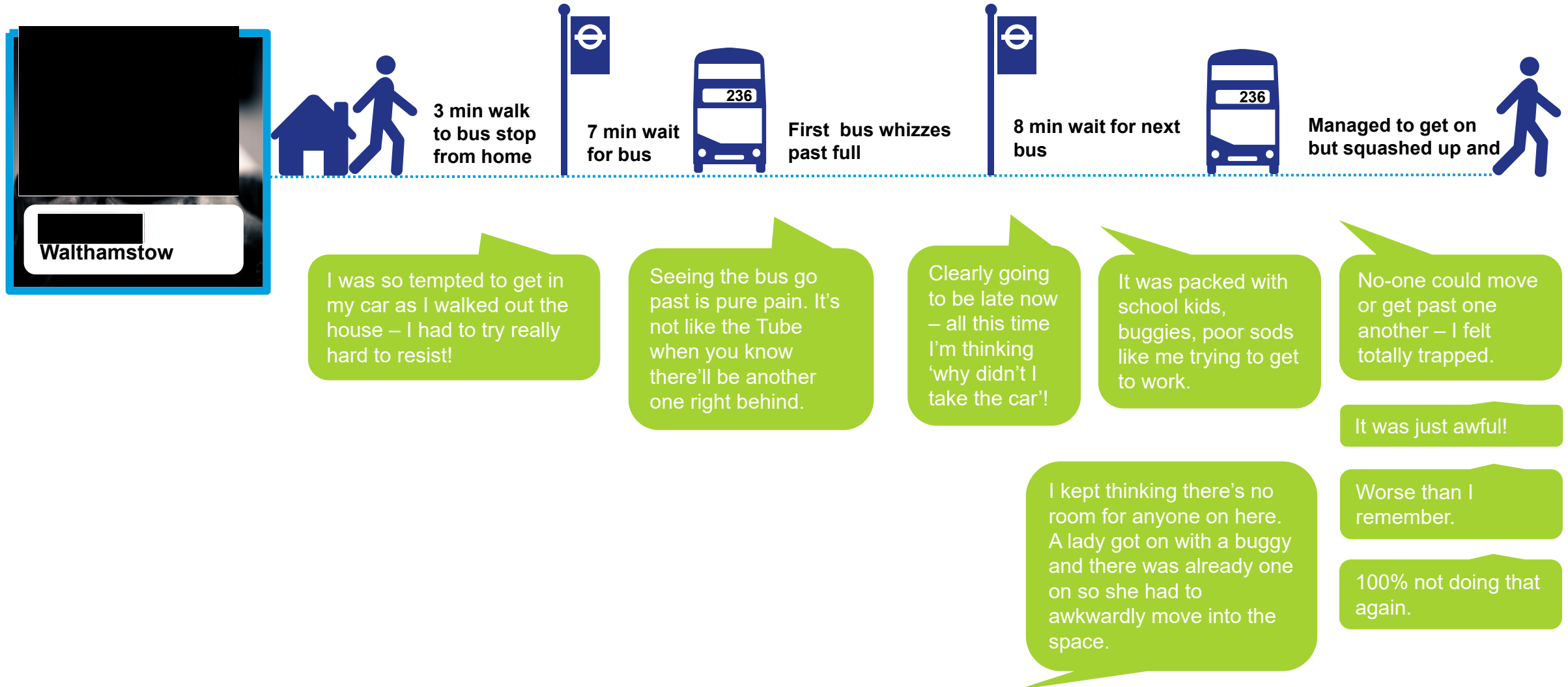
*Everyone else just started driving to see each other – so I did the same.*

"Bus does not reflect who I want to be or fit with my self-image"

## SWITCHING ONE JOURNEY TO BUS...



When [redacted] swapped his daily drive to the Tube for a twenty minute bus ride, he rediscovered how unreliable and unpleasant the experience could be

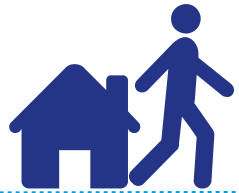
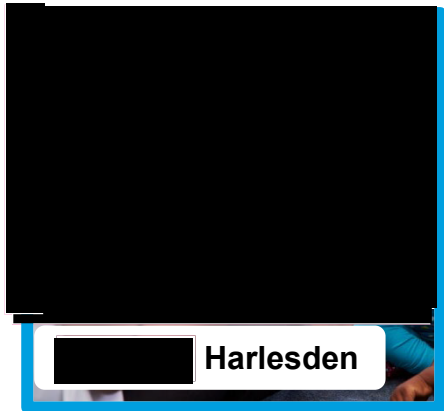




## SWITCHING ONE JOURNEY TO BUS...



When [REDACTED] took the bus to Brent Cross instead of driving she remembered just how much longer it took than driving – I could've gone to the gym!



5 min walk  
to bus stop



10 min wait  
for bus



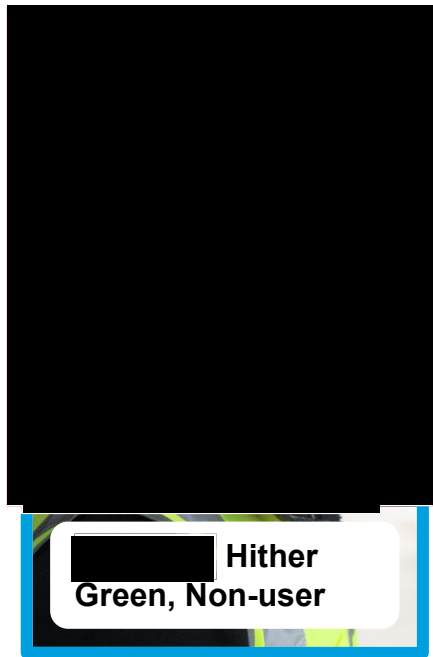
50 minutes ride to  
Brent Cross

Left the house,  
feeling good –  
always in a good  
mood before  
shopping! And  
Brent Cross on a  
weekday isn't too  
crowded.

Wasn't ideal having to wait  
but it was a nice day and I  
didn't have anywhere to go  
so it was okay.

To be honest I had  
forgotten how long it  
could take! I checked  
before I travelled but  
by the time I got  
there I was thinking –  
why didn't I just  
drive?!

# When using the bus for the first time in years, [REDACTED] felt impatient and self conscious



It was freezing cold and the bus took longer to arrive than it said.

This would take me 5 mins in my car!

I sat up on the top deck which I felt comfortable with as there wasn't many other people up there

There were so many stops, which annoyed me because I was not in control.

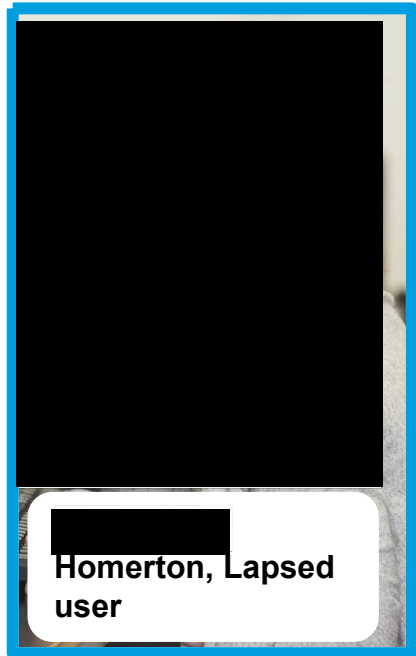
I had enough, we were not moving, so I looked at how long it would take to walk on Google Maps and got off.

I just couldn't hack it.

I couldn't bear the thought of doing the return journey by bus so I ordered an Uber from the restaurant to my house.

I felt naughty but it was worth it – it was 5 mins door to door.

When [REDACTED] swapped a short taxi trip home for the bus, she felt let down and judged



There is a bus stop close by so this was the best bit of the journey.

I got a seat, I thought great, this is going to be easy!

I was waiting for more than 20 minutes for a bus I could take to arrive

But lo and behold it terminated early half way through my journey

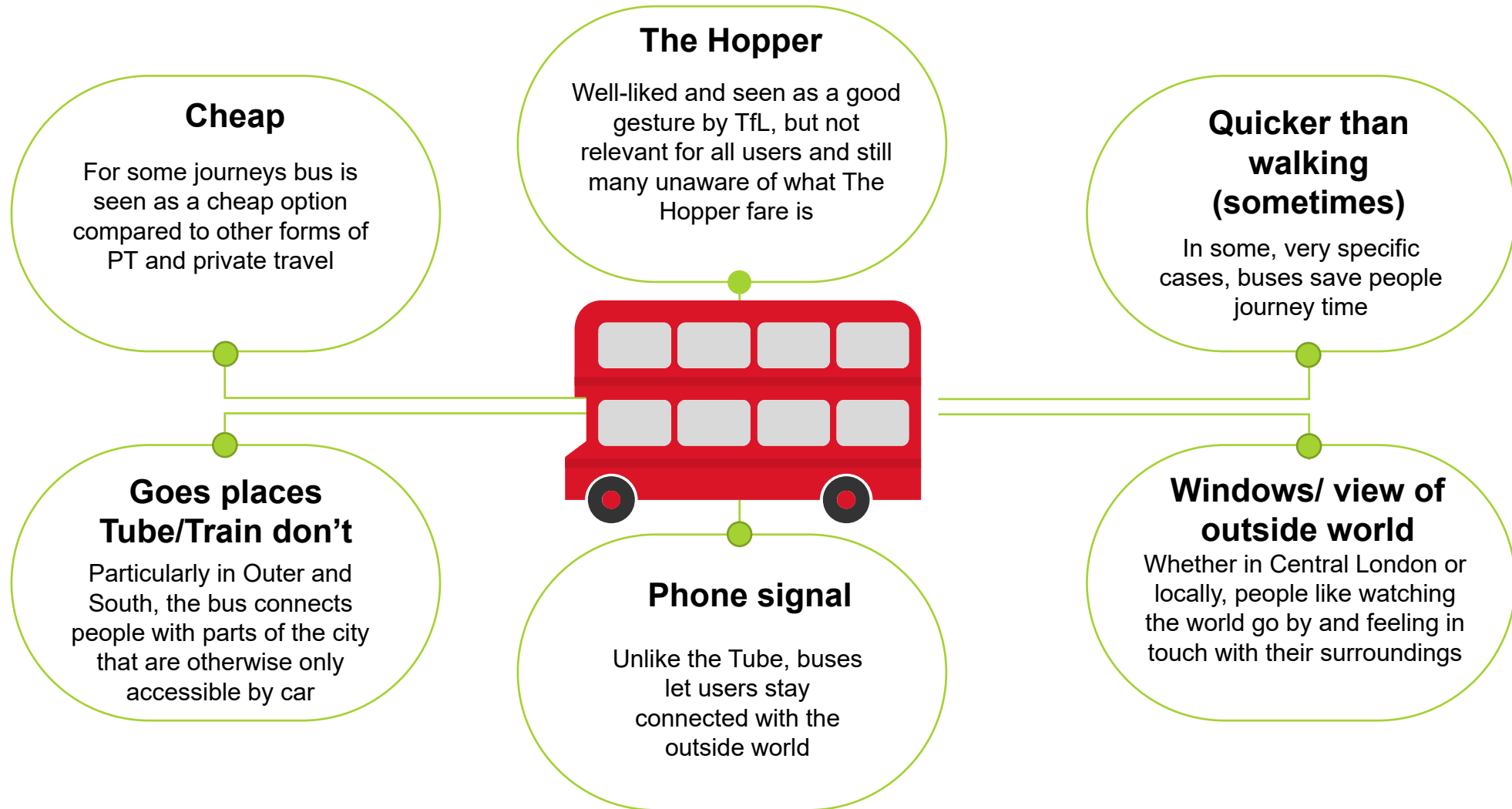
I was so frustrated and felt really let down

When it finally came, it was very crowded, I managed to get a seat but felt uncomfortable as someone standing had a walking aid, because I am not visibly disabled I felt judged by other passengers and not confident enough to stand up for myself.



**Getting people who use the bus  
to use it more often**

# The bus has benefits but they aren't strong or consistent enough to offer a unique advantage



# Bus is falling behind in modern London while other modes keep up



Disruptors are filling in gaps – they are positioned as ‘transport solutions’



*“a much needed alternative to Uber, offering the **lowest fares**, better treatment of drivers and riders, and a corporate ethos that puts **safety first**. We have a **seat for everyone...**”*



*“Ride runs evenings and Saturdays.*

***Because the day is for public transport.”***

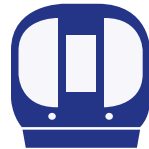


*“**Freedom** to access a car or van where and when you need one, **without any of the hassle or expense of ownership.**”*

## Uber

*“Get a **reliable ride in minutes**, at any time, and on any day of the year. Tap and **let your driver take you where you want to go**”.*

Other TfL modes are modernising to meet needs and becoming more aspirational.



**Tube**  
Wi-Fi.  
Night Tube.  
Investment.



**Overground**  
New stock.  
Wi-Fi.  
Modern stations.



**Walking and Cycling**

Active travel is more aspirational.  
Health and fitness goals.  
A green choice.



Car continue to meet the needs of Londoners (outer)



*“My car is an **extension of myself**, it is the reason why I can do all the things I need to.”*

*“Life **without** my car would be **very limited**, when it’s in for its MOT I **feel lost** and barely leave the house!”*

*“It’s [the car] who I am, I’m too lazy to bother with the bus, I’ve got it **too good.**”*

# The “mini triumphs” and perks of bus travel are rare and do not reflect a service that is meeting core customer needs



Discovering a bus route that goes *exactly* where I'm going



Realising the bus stop is right outside my final destination

Getting to the bus stop just as a bus arrives and saving the walk time to the Tube

Running for the bus and just making it in the nick of time

Getting the best seat in the house (front seat, top deck)

Going upstairs to find an empty top deck all to myself



**BUT THESE ARE THE EXCEPTIONS THAT PROVE THE RULE: USERS DON'T FEEL LIKE THEY ARE 'WINNING'**

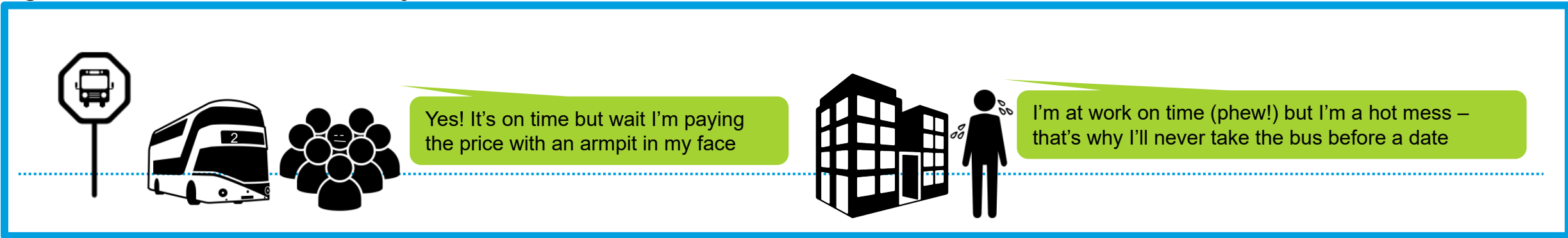
Sometimes it's awesome – you get the whole top deck to yourself – like my very own private bus! – but let's face it, that isn't everyday.

# Bus travel is a “lucky dip” with disappointment never far – users have very real and recent experiences of the lows

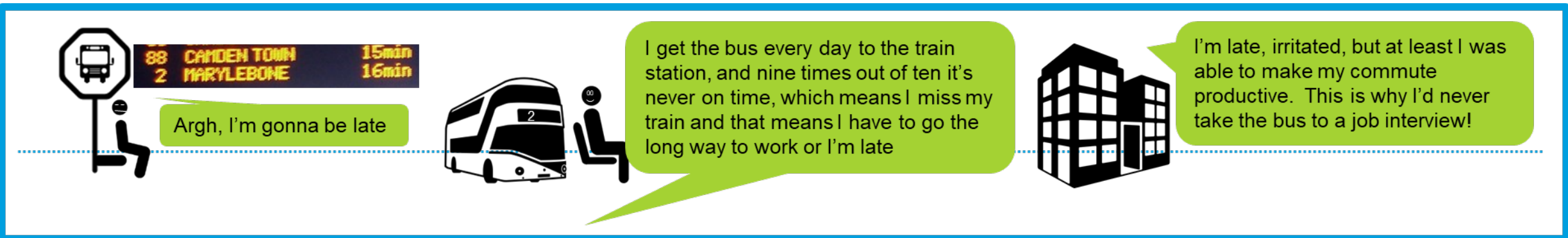


- Current users are quick to call out pinch points where things often go wrong and compromises are made / plan B's initiated...
- There is no guarantee that a bus will get them where they need to be in a timely and comfortable fashion

## Eg buses are an uncomfortable way to travel



## Eg buses are an unreliable way to travel







# Current Users are vulnerable to competition and could easily leave bus for another mode

- Current users often take the bus when they feel they have **no other choice** (due to cost, accessibility/availability of other modes)
- Others use it **when they have the time** and can accommodate a slower, less reliable way of travel (eg off-peak, no commitments)
- Buses therefore often sit relatively **far down people's list of desirable ways to get around London** compared with other modes (PT, AT and private)
- Many current users **know the benefits of other modes** and use them regularly
  - Own car – comfort, ease, convenience, relative low cost for family travel
  - Other PT – Tube, train are fast and on the whole reliable
  - PHVs – personal, comfortable, efficient
  - Active travel – aspirational and often quicker/same time as short bus trips

We still couldn't live without our car. The bus works for certain things but when I've got the kids on a Saturday and we want to go out, maybe do some shopping then go on somewhere fun, the bus would never be my first choice

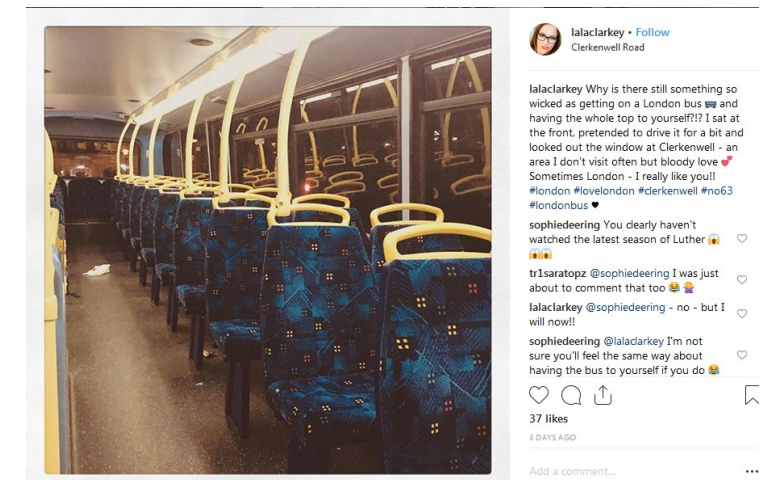
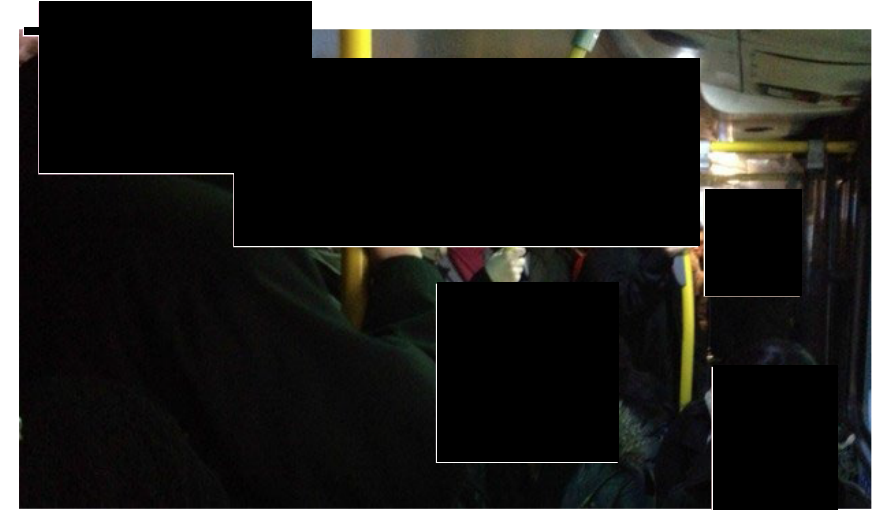


## Buses' fit with 'modern life'

# Buses are public spaces that inhibit people's ability to create private space



- Privacy is a very powerful concept in British culture and has special relevance in a city as crowded and busy as London, where people have evolved new ways to create a sense of privacy even in very public spaces.
- Buses are **strongly public** spaces that make it difficult for travellers to create their own sense of privacy because they are very confined spaces and also the way that seating is arranged:
  - Low ceilings, narrow passageways
  - Back vs front seats, high vs lower seats
  - Sets of two-seater seats feel more invasive than single line of seating as on LU or Overground
  - Duration of journey and lack of consistent speed vs LU/Overground increases tension when space is packed
- There isn't a strong social contract or code of conduct – unlike the Tube which has defined behaviours that help people create and respect privacy (eg not talking to others)



Source: *Buses Semiotic Analysis 2019*

# The bus paradox: “Buses are for everyone but not for me”



- By being for everyone, bus cannot be aspirational (Cultural analysis)
- People are quick to draw a distinction between themselves and ‘others’ on the Bus
- Many of the negative words used to describe others refer specifically to school children.
  - Everyone recalls an unpleasant experience involving school kids
  - There is a shared sense of loathing and an awkward, uneasy animosity pervades the on-bus community
- They are also used by a very diverse range of users, that can create a sense of discomfort and/or distrust
  - A sense that on the bus you are more likely to encounter ‘crazy people’ and ‘weirdos’ that make you feel uncomfortable



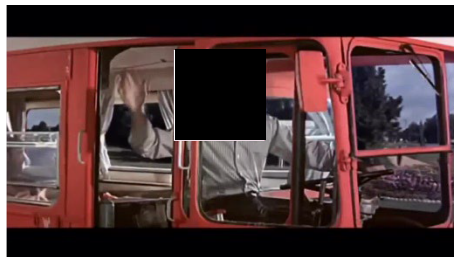


# Pop culture and the media represent the extremes of bus but neither is relevant or appealing to Londoners



## 'Iconic'

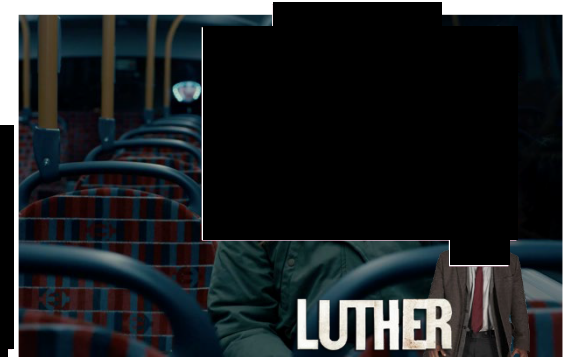
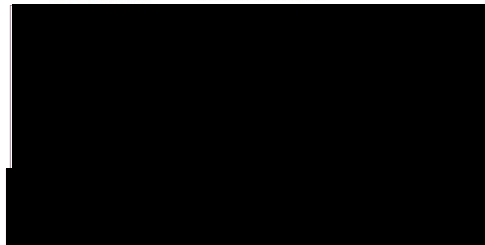
- Tourism
- London's past
- Childhood
- Nostalgia



## Woman 'helped partner hide boy's body because she didn't want to be next victim'

Stacey Docherty, 38, said her partner, Gary Hopkins, was like a 'loose cannon' and 'abused her on a regular basis'

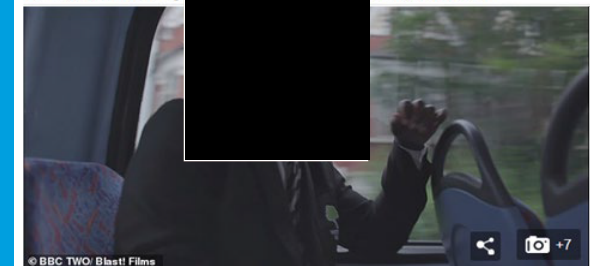
By Sam Corbishley & Tiffany Lu  
22:15, 18 March 2019  
UPDATED 22:17, 18 March 2019



## 'Undesirable'

- Risk/Danger
- Mundanity
- Crime

Speaking to cameras on the bus, Jamarley says: 'I don't even want to be on this bus, but the next one will take too long.'



The figures come after a bloody week in which six people were fatally stabbed across the UK. In other developments yesterday: A 19-year-old was stabbed in the chest on a bus (pictured) in North London



- Cultural representations do not exist in a vacuum but are themselves shaped by public perceptions and social norms

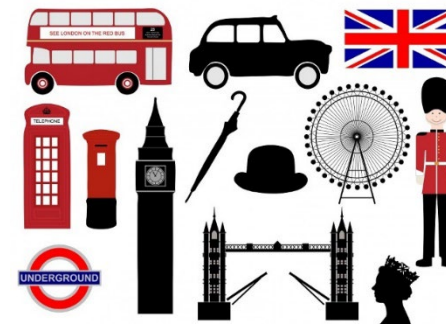
Source: *Buses Semiotic Analysis 2019*

# Bus is a traditional symbol of London, but London is changing



The bus is iconic, but associated with the past, things that don't change and tourists vs 'real' Londoners

- Images of buses in the media often show iconic London landmarks and other features of the cityscape that are **associated with tourists** and are places people who live in London tend to avoid
- While this helps cement the bus's reputation as iconic parts of London's landscape, more often than not the features they are associated with are **historic and unchanging** – and buses' frequent association with them **shapes perceptions of it as a dated mode of transport**
- By contrast – the London that Londoners experience and love is **modern and ever-changing**



Source: *Buses Semiotic Analysis 2019*



# Improving bus market share



# The problem is with the bus product and lack of competitive advantage



## Key Insights and Challenges

- Non-Users aren't coming back, they have moved on
- Current users are vulnerable to competition from more appealing modes
- In society as a whole, buses are seen as iconic but old fashioned, inclusive but not aspirational, and out of tune with current life
- Action is needed to stop buses becoming more out-dated and undesirable



## Implications and Recommendations

- Buses must deliver a **better customer experience**: better than current, and better than alternatives
- TfL needs to invest to ensure buses appeal to new audiences and protect existing ones:
  - **Major improvements to the bus offer** – bringing buses into the 21<sup>st</sup> Century and in competition with other modes
  - **Once bus has improved** – change perceptions of bus travel, who buses are for and how they fit with modern London life (cf. competitor campaigns eg Via Van)



# Buses need to become significantly better to be a desirable transport mode with competitive advantage



- Major and consistent service changes are required to avoid the risk of losing current customers and make sure buses have broad appeal
- Buses need to consistently compete with other modes



⊖	⊖	⊖	⊖	⊖	⊖	⊖
Compete on speed and reliability	...safety and security	...comfort and accessibility	...affordability and value	...information and messaging	...'human touch'	...sustainability
<ul style="list-style-type: none"><li>▪ Express/destination buses</li><li>▪ Better priority for buses: bus-only lanes (no taxis)</li><li>▪ More frequent services</li></ul>	<ul style="list-style-type: none"><li>▪ Make buses feel safer – staff presence, layout, regulating behaviours</li><li>▪ Use the bus environment to create feelings of safety</li></ul>	<ul style="list-style-type: none"><li>▪ Customer and privacy oriented layout and use of space/seating</li><li>▪ More provision for those with accessibility needs</li><li>▪ AC and heating</li></ul>	<ul style="list-style-type: none"><li>▪ Remain the cheapest choice; but <i>also...</i></li><li>▪ Provide essential mod cons – WiFi, USB ports</li></ul>	<ul style="list-style-type: none"><li>▪ Provide real-time information for journey planning</li><li>▪ Ensure timely and clear information when things go wrong (via PAs and drivers)</li><li>▪ Be user-friendly (ie more tailored and integrated)</li></ul>	<ul style="list-style-type: none"><li>▪ Create a culture of respect on and for buses – among customers, with drivers and for the system itself</li><li>▪ Take advantage of driver presence eg driver announcements</li></ul>	<ul style="list-style-type: none"><li>▪ Be the green choice (link up with Healthy Streets)</li><li>▪ Be visibly greener eg Hybrid across the network</li><li>▪ <i>'Stop pumping out dirty smoke'</i></li></ul>

# Semiotics identified other opportunities to evolve the culture of the bus



## Reduce tension and fear

Humanising the people who use the bus and encouraging better etiquette

## Create space for more privacy

Helping customers to define, protect and respect personal space whether seated or standing

## Bring more symbols of modernity

Associated with symbols of modern London vs traditional London, communicate modern changes

## Generate emotional connection with routes

Make buses more than just numbers

Source:  
Buses  
Semiotic  
Analysis  
2019



# Thank you

 [2cv.com](https://2cv.com)

 [2cv.com](https://2cv.com)



# Appendix

# Recent review of TfL quantitative data explored 12 hypotheses for Buses decline and found no strong evidence for Buses' competitive advantage



London's population is changing

Falling disposable incomes hitting younger people especially hard

Austerity impacting core Bus customers

Worsening journey times

Bus network not keeping pace with changing user needs (in terms of its structure)

NEW HYPOTHESIS

Bus does not *feel* modern while other modes do

Service reductions driving away demand

Customer experience not keeping up with expectations (eg on-board information provision)

Safety and security concerns acting as deterrents

Customers shifting to other modes - more sustainable travel, private hire, car

Increased fare evasion

NEW HYPOTHESIS

Reduction in shopping and personal trips, with greater impact on Bus

