



# **TfL Outer London Bus Numbering and Prefix research**

Report by 2CV

May 2023

## Introduction

TfL will be launching a major expansion of their Outer London's Bus network in 2023. The newly named Superloop will be made up of limited-stop express Bus routes around Outer London that will provide quicker and more direct services to Outer London town centers and stations.

To support the roll out of the new service, TfL are keen to test the re-Numbering of existing express Buses with customers, as well as the Numbering approach for the future new routes going into consultation.

## Business Question

What is the clearest and most differentiating Numbering prefix for the new TfL Outer London Express Bus service (Superloop)?

## Research Objectives

1. Customer perceptions and awareness of Bus Prefixes and Numbering systems
2. Customer preference for how Prefixes and the Numbering system may look following the introduction of a new Bus service, the Superloop
3. To gauge the level of desire for, and the potential appropriateness of future Bus service specific Branding

This document is the final report from qualitative research conducted as part of the Outer London Bus Communications project.

## Methodology and Sample

- 2x evenings of online virtual hall test sessions (max 30. Minutes per session), exploring customers perceptions, understandings and awareness of the core objectives tested.
  - 36 Customers were spoken with across the two nights of hall tests
- The sample for the sessions was as follows:
  - Customers who live near to the proposed Superloop routes
  - Range of Bus usage levels: High (Once in the last 7 days), Medium (Used the Bus in the last month, but not the last 7 days), Low/No (have not used the Bus in the last month)
  - Mix of Business and leisure users
  - At least 4 neurodiverse participants
  - Natural fallout of the following across the sample:
    - Age
    - Gender
    - Ethnicity

- Impairments (Visual and Mobility)
- Awareness of the Superloop route
- Car users
- All to be Non-Rejectors of TfL
- The stimulus shared with participants are included in the appendix of this document, the stimulus includes:
  - Images of proposed Superloop routes, current Bus Prefixes, Superloop Bus images (with prefix and Numbering variations), descriptions of different Bus services proposed for potential branding development

## Executive Summary

1. Overall, customers are genuinely pleased to hear about the proposed new Superloop - Outer London express Bus service
  - It meets an unmet need for connecting parts of Outer London which can be geographically close, but often difficult to reach by public transport
  - It promises speed and efficiency
  - It has the potential to encourage people to switch from the car, making travel in outer parts of London easier, more convenient and more efficient
2. The branding of the Superloop is also well received
  - It differentiates the service from the rest of the Bus network which will help aid ease of use and increase awareness and familiarity of the new service
  - The design feels modern and fresh, especially the new Superloop map, which was particularly liked for its design, simplicity and ease of understanding
3. As a prefix to Bus Numbering, 'SL' was preferred by the majority of customers (3/5 of the sample) over 'X', as it feels the most logical and, with time, easier to understand. That said, it's important to note that:
  - Most customers are not overly reliant on Bus numbers to help them navigate the network. They use apps and countdown to see when the Bus is coming and use destination / numbers to ensure that they are boarding the right one
  - Bus Prefixes are even less recalled and relied on. Most customers couldn't name a Bus prefix spontaneously except for 'N' (Night Bus) and had no understanding of what 'X' meant or why it was used
  - While SL was preferred, it will need time to establish its connection with the Superloop service

## Full Report

### 1. Customer awareness and reactions towards the new Superloop service

*How do customers feel about the introduction of a new Outer London Express Bus service?*

Before exploring the use and value of Numbering and Prefixes on Buses, it was important to gauge overall awareness of the new service and sentiment towards it. Unsurprisingly, due to limited marketing and communications of the service (and the fact that the service is still in early consultation stage) customers had limited in-going awareness of the Superloop. That said, upon further explanation (showing the new Superloop map) the idea of a new Bus service that specifically provides a service to the outer parts of London was very well received by *all* customers (living close or nearby to the new route).

Many customers referenced experiences and annoyance of previously having to 'go in, to go out', of London and were extremely appreciative of an express Bus service to solve this problem. We heard customers' describe 'black holes' in Outer London areas, areas that while geographically close were difficult to get to via Public Transport.

*"Exactly! It is so annoying for me that when I want to go to Arnos Grove, the fastest option is to go in towards Central just to come out again straight away! This is a brilliant idea, they should be showing this everywhere"*

*"Last week the kids wanted to go shopping in Ilford and I didn't have the car. I live in Walthamstow and there was no way of getting there other than going in and out of town. We would have totally used this"*

As a result, these customers could imagine trips and journeys where the Superloop could be very beneficial joining parts of London and would be keen to use it in the future.

For those who often prefer the car over the Bus, they could also see the value for certain journeys especially for leisure trips at the weekend and/ or shorter commuter trips. For them, an 'express' Bus service brought much needed reassurances, challenging the current perceptions that Bus journeys in Outer London are typically slower than the car.

*"I live in Hillingdon and work in Ealing, at the moment I drive every day, but this could be a good alternative to getting the car if its quick and reliable."*

*"For me, the Bus is always slower than the car, it just doesn't make sense for me to use the Bus if it doesn't have priority over cars!"*

Overall all customers felt this new service was something for TfL to 'shout about' and should be communicated more widely to those living in outer areas of London.

*"They need to be shouting about this, they should be proud of it and putting it all over the place! These Buses will be super helpful for me"*

## 2. Understanding the role and value of a unique and distinctive Superloop brand identity

*What is the role and the value that is brought by having unique Superloop branding? What is needed to improve customer awareness and understanding of the Superloop?*

While customers recognised that outside of London it was more usual to have a variety of branded Bus services, London by contrast has a very iconic and distinctive red Bus for all routes and services across the city.

That said, it felt logical and beneficial for TfL and Superloop to have its own specific identity to help raise the profile of the new service and distinguish it from other Bus routes. They felt this would help customers to notice the new service, educate customers on the areas that it serves and how it is new and different from other Outer London Bus services.

When asked where customers would like to see the branding, most considered their journey touchpoints and expected that at a minimum, they would see it at Bus stops and on the Superloop Buses. In addition to this, customers thought about the added benefit of Superloop branding being visible at:

- Local transport hubs / Bus terminals
- Exiting Tube stations to help signpost to on-going Superloop routes
- On Tube and underground stations where the Superloop can be accessed eg Walthamstow Central / Victoria line

*"It is a good idea to have branding on the Bus in such an obvious way, as it is a new service that it is really helpful to people, so anyway to get information out is great!"*

Finally, the new Superloop map was especially well received for its design aesthetics, but without further context or knowledge of the services, the map does prompt key questions such as:

- How many stops will there be on each route? How quick will it be?
- What is the significance of the 'broken roundel' symbol in between stops eg North Finchley, Heathrow Airport, Croydon
- Will the colours for the route lines will be used in any other way? Will they become a way to distinguish between different parts of the route.

To that latter question raised by customers, just a few customers were surprised not to see more use of the 'Superloop' line branding featuring in the designs (e.g like Tube line colours) and thought it might be nice to include these within the Buses (handrails, seats etc). But the overall consensus was to keep things simple (eg. white and red combination) and avoid any messy or over use colours that could have the potential to confuse customers.

*"I like the new Bus colours but I would expect to see more of the individual colours on the map, like the lime green will be on the side of the Bus from Royal Docs to Walthamstow"*

### 3. What value do Bus route Numbering and Prefixes have for customers? How do they see these working for Superloop

*What are the levels of customer awareness around Bus route Numbering and Prefixes? How crucial are they to their journey?*

When exploring the value and use of Bus route numbers and subsequently Prefixes, it became clear that customers rarely think about them consciously as part of their journey planning. This is for a number of reasons:

- Customers know the number of their local or frequent Buses and so numbers exist more at a subconscious level, but not something they tend to give too much consideration or thought to day to day.
- For new and unfamiliar journeys, customers are using digital tools and apps to help them journey plan and this tends to be more location specific i.e. I need to go to X how do I get there.

*"When I think of Bus numbers I think of my gran telling me which one to get. They feel a bit old fashioned in this day. I just want to know the destination, that's most important to me"*

*"I have never thought about them, I just kind of see what my phone tells me to get, look and wait for it and then get on it. Never crossed my mind why they are the way they are"*

*"My dad is a Bus driver and I have never even asked him why some Buses have a X, I have never thought about it and I've lived in London all my life"*

Bus Prefixes are even less considered, with some only vaguely understood. Most customers couldn't recall any Bus Prefixes except for N and for a minority X – both felt to be more logical to decipher.

- N = Night Bus most commonly understood
- X = Express Bus service, rarely but occasionally understood

Other Prefixes (W,C,H etc.) are not understood and lack any relevance or meaning. In fact most customers had never even considered why they were used on Buses and their value to customers. On probing in more detail, some assumed they were local area Prefixes – ie H for Harrow, C for Croydon etc.

For those aware of a few Prefixes, they rarely felt them to be critical to their journey or the planning of their journey. As a result customers were not using Prefixes to aid journey planning and tended to ignore them and not spend time deciphering what they mean.

#### 4. Understanding preferences and expectations towards future Superloop Prefixes.

*When considering the implementation of the Superloop, what are customers expectations around Superloop route Prefixes and Numbering systems? How well does the branding on the Bus support awareness of an incoming Superloop Bus? What can support mitigation of confusion towards the new Bus service?*

As mentioned, customers come to the issue of Bus Numbering and Prefixes with quite a bit of apathy as they don't tend to see or consider them to help them with their journey planning. However, when considering how the Superloop might be numbered / prefixed in the future, customers naturally followed the lines 'Superloop' itself and mentioned how they could see it being the 'S...' or the 'SL...' routes. To that end, the majority of customers (over half of the sample) felt the use of 'SL...' to be completely logical and natural, especially when seen alongside the Superloop branding on Buses

*"It just makes sense! I even said SL before you showed me the pictures, it just makes sense to have Superloop and SL"*

*"Works to show that it is part of the Superloop, it works to show that it is something different, it just works!"*

*"The SL just feels better it doesn't look like anything else you see for Buses and you want this new service to stand out so people use it!"*

For those that had awareness and understanding of what 'X' meant and the existence of the 'X' routes, they also mentioned that 'X...' could still be appropriate for the service if it was an EXpress Bus service. But this is where additional customer information would be required to mitigate any customer confusion around the continuation of X routes, if Superloop would replace these services or indeed be any quicker than those already in service.

*"I think the X26 is an express service to Heathrow airport, but actually it goes around the houses and takes ages. If they replaced it with the Superloop, I'd expect it to have fewer stops."*

*"I guess it makes sense if you know what it means or if you actually use those routes you mentioned, but for me it feels like it would be too different to the branding and everything around it"*

When informed to participants that implementing 'SL...' would mean the creation of a new sequential Numbering system (SL1, SL2, SL3 etc.) most customers thought this was logical and could follow the route around the map ie SL1 = Royal Docks to Walthamstow, SL2 = Walthamstow to North Finchley etc.

There was a small minority of customers who became hesitant to go all in on 'SL'. This was especially seen with those who use (or have previous experience using) the current 'X...' routes. It was here where customers felt that maybe having a single 'S...' with the current Numbering system could be more appropriate, helping keep the familiarity with the continuation of existing Bus routes (X26, X68, X140), but also implying them to be a part of the Superloop network.

In particular they felt that keeping the familiar existing Bus route numbers would help decrease potential customer aggravation and confusion as well as helping to educate customers on the Superloop system, by keeping them uniform.

*"I guess there is that concern with the loss of familiarity, people just don't like change, they prefer the known and fear the unknown"*

*"For some it is actually quite important to have that familiarity in their life and this could cause them some concern"*

*"Around here everyone know the X26, so they might be a bit worried if it disappears altogether though, but it takes ages, its stops everywhere so if there is a new one, that gets to Heathrow quicker, people will be really pleased"*

The level of branding on the Bus and the inclusion of 'Superloop – Limited Stops', was felt to be ample to reduce any possible confusion when exploring both 'X...' and 'SL...'. However, some customers felt that 'Limited Stops' added little value, and that the term 'limited' had negative associations such as disruptions on the route; not expressing the express nature of the service.

To that end, 'Superloop – Express Service' was felt to be clearer in communicating the nature of the service, customers expecting it to get them there much quicker than any other methods or Buses

*"The way that Superloop is all over the Bus is great, as well, the top half being white is so good for making it clear that there is something different about this Bus, differentiating it from other services. It doesn't feel like it could be confusing whether the Bus is a Superloop with all that there"*

*"The only concern I have with that is maybe the 'Limited Stops' it feels a bit negative to me, you know with the Limited part, makes me think part of the route isn't working or something!"*

*"For me the only think I can think of is to have express written there in some way. Express just seems like it will be faster , or meant to be at least, but yeah express is just better than Limited Stops"*

*"You know the Gatwick Express, like that, it just screams faster! It'll get me there quicker than any other method. I think for most Londoners it will work pretty well to have express there"*

In summary, many customers have grown up with Bus routes evolving over the years, and while there was an immediate desire to minimise customer annoyance, they also felt that future changes which are simple and logical to understand would be more beneficial in the long term.

*"I have seen Buses around me change all the time growing up here, but you get used to it really quick! For me it is not too much of a concern"*

## 5. How do customers feel about the roll out of more branded Bus services?

*What are customer expectations and attitudes towards the potential development of more branded Bus Services specific to certain Bus routes (Local Community, Days Out/Escape the City, Tourism and Heritage, Commuter, Interconnector and Day/Night Bus services)?*

Overall there was limited customer awareness of any other 'branded' Bus routes across the country. When talking about this with customers, Park and Ride, Private coaches, National Express, the Oxford Tube and Metro-Line services were felt to be more distinctive Bus services.

*"I don't know does National Express count as one? I guess you see lots of coaches around central carrying people around from out of town as well"*



Overall, customers had mixed responses to the ideas shown, with some being ruled out completely and others having a bit more appeal (interconnector and the days out services). The idea of future branding of Bus services....

*Works well when.....*

- It is a genuinely new service, meeting a new need for customers. The interconnector and days out was felt to be something new (if new routes and destinations)
- It could help certain customer groups distinguish between important Bus services or Bus routes (those younger, older or with impairments) – school routes, hospital route etc

*"It's great to make it easier for our children so they can use services like the one to Chessington, without having to rely on one of us to drive them around the M25"*

*"It's so important for the older generation, as we rely on public transport for everything and it keeps us out and about"*

*"it can't hurt to help explain to people what the Bus does"*

*"Maybe they should brand school Buses! That way it would be easier to know which ones to avoid!"*

*Doesn't work well when...*

- Rebranding for rebranding sake. On the whole, customers didn't feel that rebranding existing routes or services was required as they were not 'new' or 'unique' services that require their own brand identity in the way that the Superloop does.
- It could potentially dilute the iconic and traditional red London Bus network - ultimately diluting their presence and wide appeal

*"I fear that it will take away from the red Buses that are such a big part of the London image for many, especially for tourists"*

Customers also came up with their own ideas such as the Christmas Lights Buses, or branding of school Buses!

Local Community	<ul style="list-style-type: none"> <li>✘ Not felt to be most appropriate, with customers perceiving them to most often be the only Buses found in the area</li> <li>✘ Can make people think of Dial-a-Ride services</li> </ul>
-----------------	--

<p>Days Out/Escape the City</p>	<ul style="list-style-type: none"> <li>✓ The idea of many of these Buses is greatly appealing, especially for those with families</li> <li>✓ Could be good to have its branding so that people know that it may exist</li> <li>✓ Can be appealing for those without cars, or without the funds to get multiple modes of transport</li> </ul> <p><i>"Would be good for it to include locations that aren't leisure parks but also for places to go for works and the like"</i></p>
<p>Tourism and Heritage</p>	<ul style="list-style-type: none"> <li>✗ Not seen to be as necessary, often felt that part of the experience when visiting these are the traditional and iconic Red London Buses</li> <li>✗ Some felt that it was covered already with the hop on, hop off services already available</li> </ul>
<p>Commuter</p>	<ul style="list-style-type: none"> <li>✗ Assumed to just be regular Buses – <i>"Do they need any branding or exposure or the like, I don't think so"</i></li> <li>✗ Most assume that there may not be any relief on how Busy they are, with this, branding wouldn't be as important as a vastly more frequent service to deal with any potential uptick in users</li> </ul>
<p>Interconnector</p>	<ul style="list-style-type: none"> <li>✓ Felt to appeal as a service that like the Superloop would be helping to provide a service for a need that maybe isn't as well met as is desired</li> <li>✓ Seen to be useful for those that live further out and don't want to get rail services</li> <li>✓ Felt to be a new service, but also a service that originates from outside of London so isn't as affected by the need to match the tradition of London Buses, so more specific branding can be seen as viable</li> </ul>
<p>Day and Night Buses</p>	<ul style="list-style-type: none"> <li>✓ Already seen to be clear as to what they are when seen out and about, whether it is the N as a prefix, or that they see a Bus running late at night</li> <li>✗ A few feel that there needs to be greater comms around the specifics of night Buses, around which routes and destinations can be accessed and reached via them</li> <li>✗ However, generally not felt that they need their own specific branding</li> </ul>

## Final Thoughts and Implications

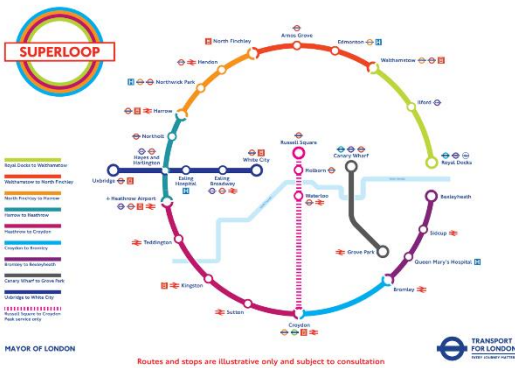
What we have seen from the research is that although general customer awareness and understanding towards Bus Numbering and Bus route Prefixes are limited, customers are able to reach a consensus around how they imagine the Numbering and Prefixes for the Superloop service to work in the future.

As we saw it is generally believed the Superloop should follow its own Prefix of SL with its own Numbering system, ie 1-9.

- It is felt that this will go a long way to help distinguish this new Bus service, further amplified and supported by the new branding ideas for proposed Superloop Buses
- Given the limited understanding and use of Prefixes generally, any changes to existing X services were felt to be minimal and any customers confusion / annoyance would be short lived. That said, it will be important to communicate these changes to customers to mitigate worry or confusion
- The idea of future branding of Bus services holds some appeal, but only if it is a result of a new and distinct offering to customers. Rebranding for rebranding sake has the potential to be seen financially wasteful and unnecessary

# Appendix:

Stimulus Shared:



## Superloop

- Express routes to quickly connect you around Outer London
- Limited stops for a faster journey
- An orbital loop of frequent and reliable services to key destinations



## Local Community

- Helping you to explore and connect with your local community
- Taking you to places you can't reach by other public transport modes
- Connecting you with local businesses for an easier and more sustainable lifestyle



## Days out / escape the City

- Routes which take you to exciting days out and family adventures
- Routes which can take you out of London and into leisurely escapes
- Helping you to explore your city in a cheap, fun and sustainable way



## London Tourism / Heritage

- Routes which take you to iconic and historic London sites and attractions
- Giving you a cheap and easy way to get directly to the places you want to visit
- Helping you to explore your city in a cheap, fun and sustainable way



## Commuter

- High frequency commuter routes into central London and town centres
- Bus priority to pass quickly through traffic and offer reliable journey times
- Modern and comfortable electric buses with USB charging



### Interconnector

- Routes which connect you up to London's tube and rail services
- High frequency routes which take you to the stations you need
- Dropping you off at the station entrance for a seamless journey



### Day to Night Bus

- Buses which run for 24 hours
- Offering you the transport you need, even when other modes are closed
- Helping you to get to work and play whatever the time of day

