



Using the bus: what young people think

Publication and briefing event

5 February 2018



Anthony Smith, Chief Executive, Transport Focus

Introduction to the day

Today's agenda

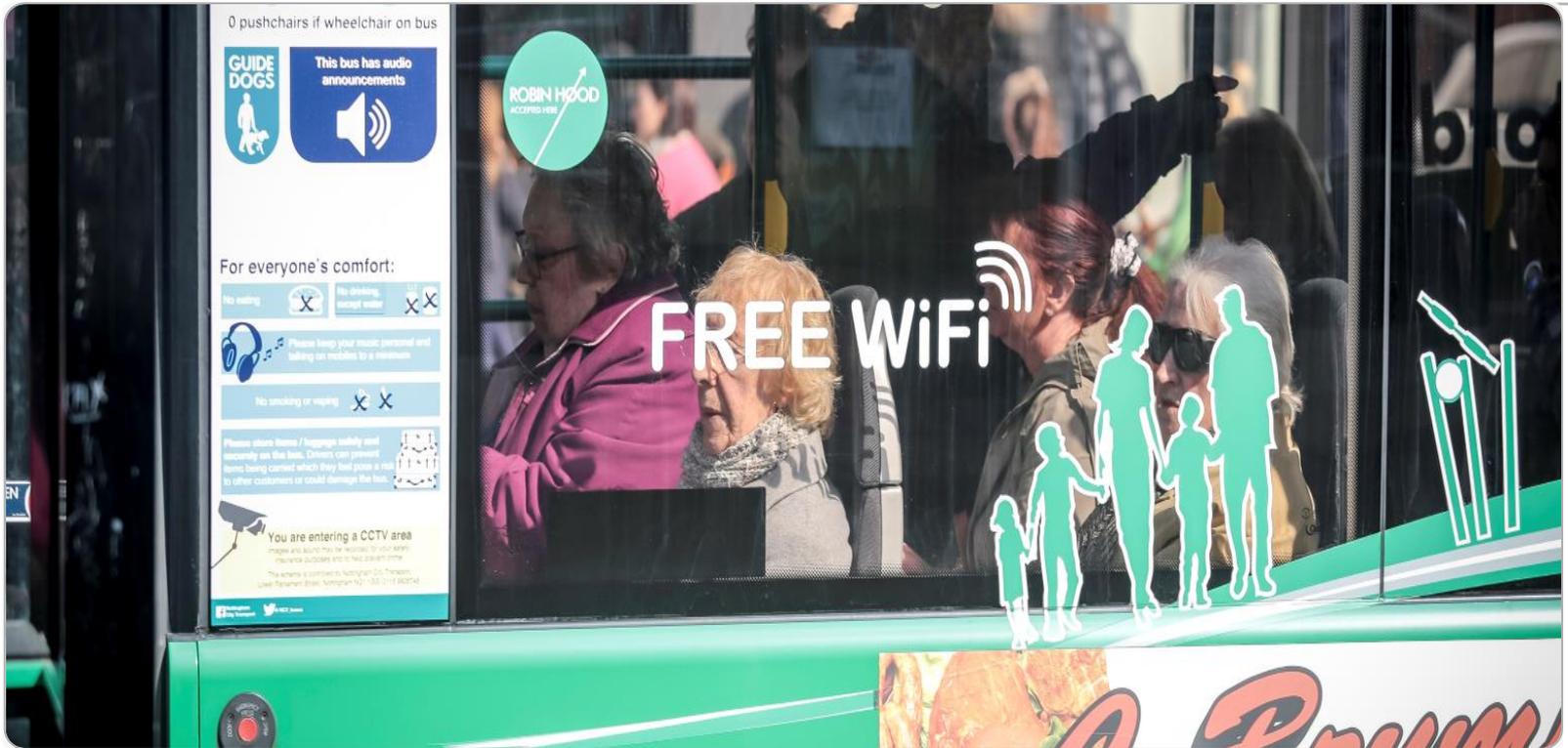
Welcome – Laura Shoaf, Transport for West Midlands

- 10:40 **Presentation of research**, Louise Coward, Transport Focus
- 11:00 **Response to research**, Harvey Morton, Youth Employment UK
- 11:05 **Keynote presentation**, Catriona Henderson, Department for Transport
- 11:20 **Liverpool City Region Bus Alliance**, Matt Goggins, Merseytravel
- 11:30 **First Bus UK**, Simon Pearson
- 11:40 **West Yorkshire Combined Authority**, Dave Pearson
- 11:50 **Go North East**, Stephen King
- 12:00 Amanda Thomson, **Campus Media**
- 12:10 Paul Corcoran, **Agent Marketing**
- 12:20 Q&A, **ALL**
- 12:40 Sum up & next steps, David Sidebottom, **Transport Focus**



Laura Shoaf, Managing Director, Transport for West Midlands

Welcome



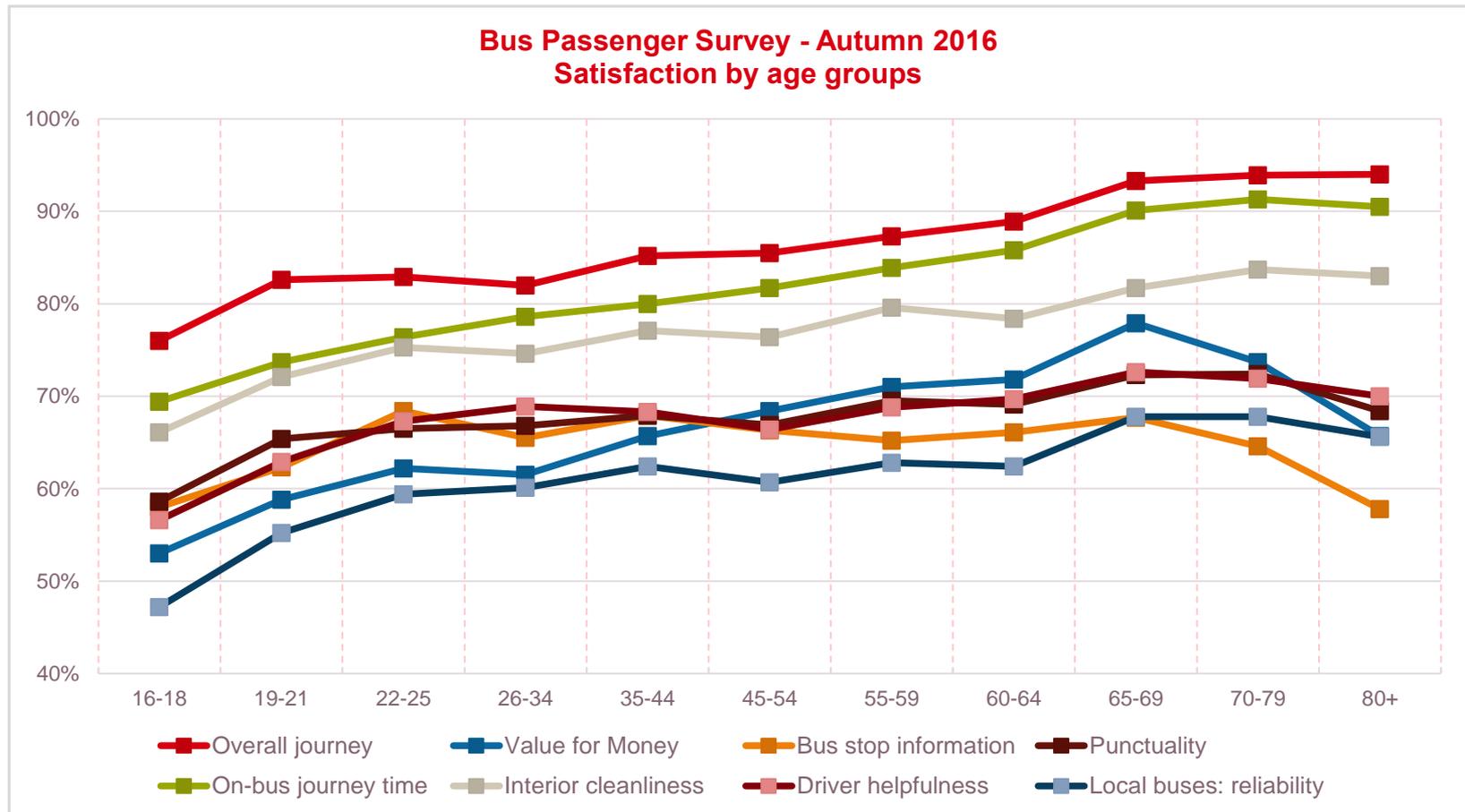
Using the bus: what do young people think?

Louise Coward, Insight Manager

5 February 2018

Context from Bus Passenger Survey

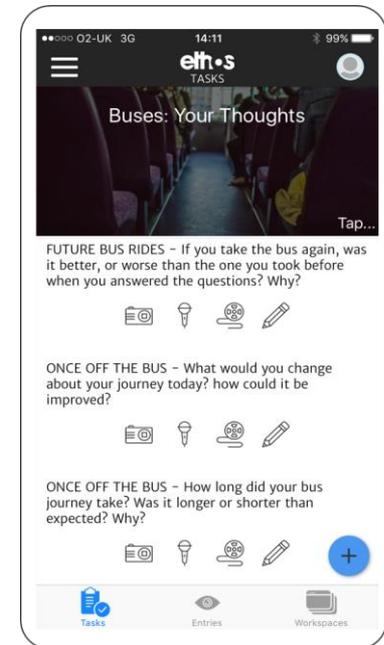
Satisfaction is much lower for young people – especially key measures



Objectives

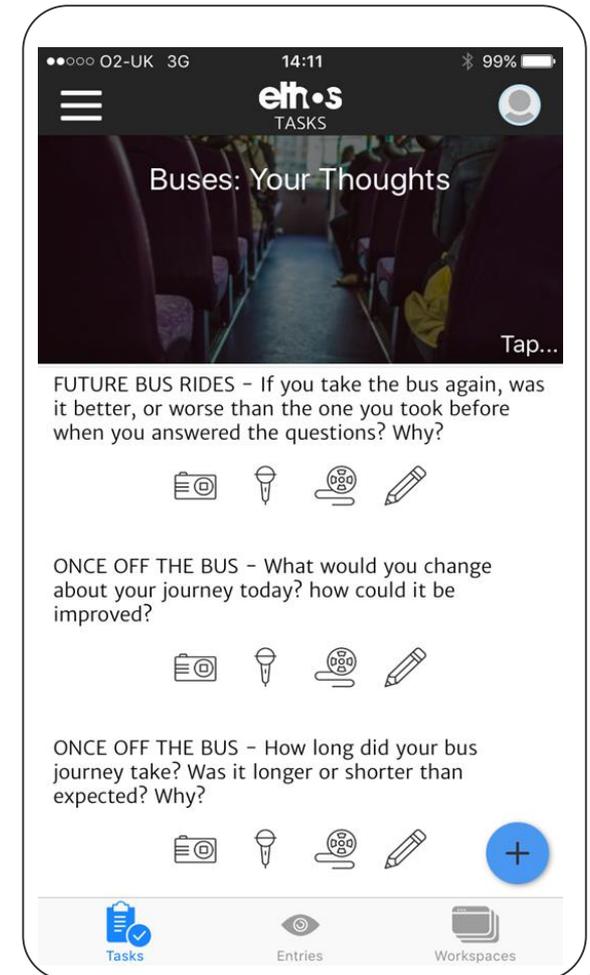


- Planning a journey
- Views on transport options
- How do young people currently use buses?
- What are their views on bus services?
- How can bus services become more attractive to young people?
- How will bus use change and why?



Overview of Method

- Mixed method approach, fieldwork conducted February – March 2017
- Detailed qualitative fieldwork – **64 participants**:
 - Pre-task: bus journey, with mobile app to record views/photos
 - 8 Face-to-face focus groups
 - Urban x2: Leeds, Solihull and x2 rural: Norwich, Shenfield, Essex. Each had two groups: 14-16 year olds and 17-19 year olds
- Quantitative online survey of **1,000 14-19 year olds**, England only
 - Mix of status: school, college, uni, working, other
 - Demographics representative of census, weighted by age, gender, region
- Worked with independent specialist youth researcher, Laura McLarty 4D research



Planning a journey is a two stage process

What is most convenient and quickest for me?

"I would bike up to park & ride, lock my bike up and then hop on the bus, because that is cheaper than getting a bus the whole way. It's only 80p vs £2 on First Buses". (Norwich, 14-16s)

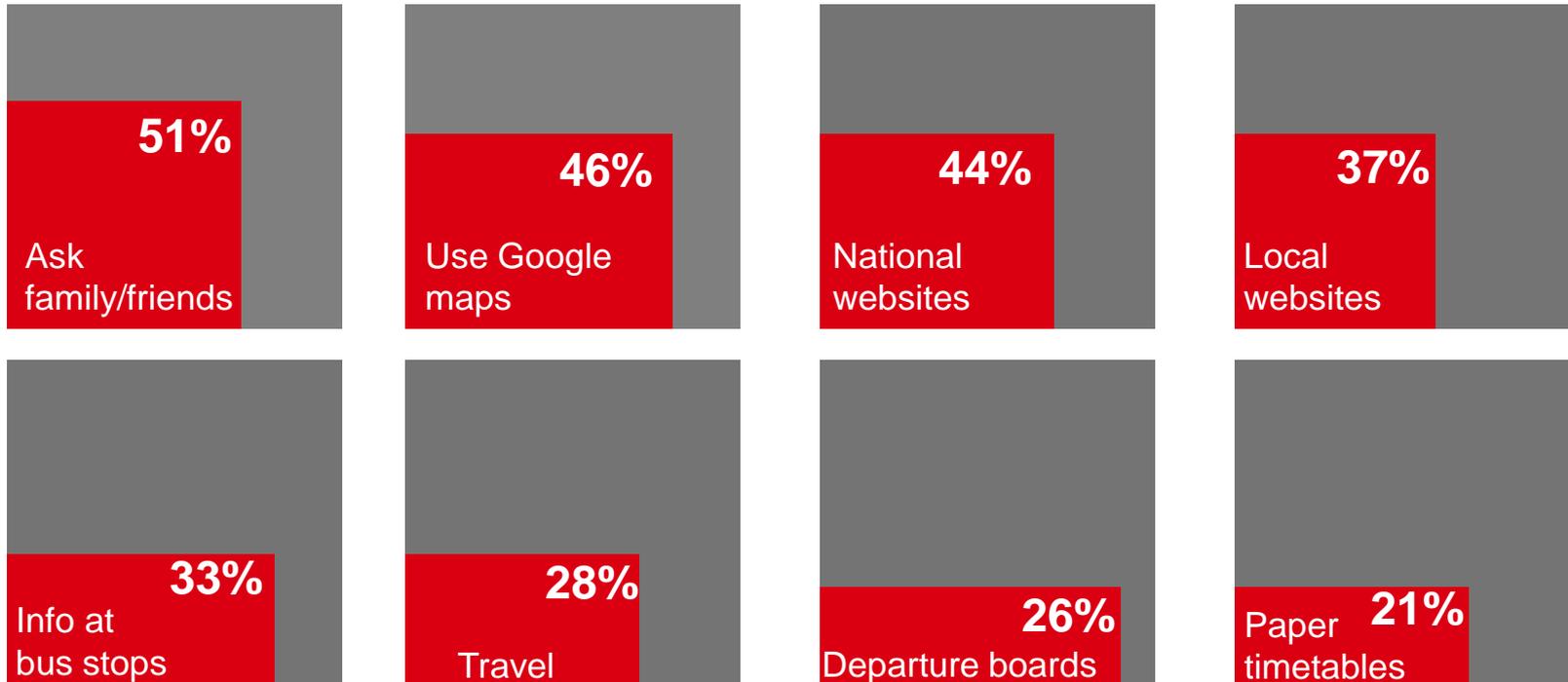
"It depends how much longer it takes. If it doesn't cost much more, but gets there much quicker, then I would go for that". (Essex, 14-16s)

How much will this cost me?

"If my parents take me then that just seems easier than having to time it all". (Essex, 14-16s)

"I would think about cost of parking, so if I was going to town for a full day, it would cost about £15 to park, so would be better to get public transport". (Leeds, 17-19s)

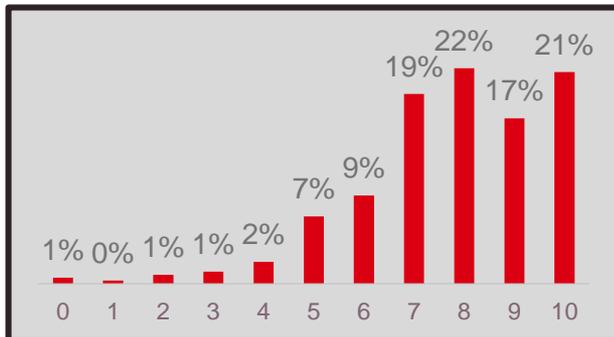
Information from Google Maps and family/ friends



Q5) How do you find information about your journey/plan how you are going to get somewhere – Journey planning?
Base: all (1003)

Broadly positive about public transport

79% agree “Public transport...is **essential** for helping **everyone** get where they want or need to go”



...needs **more investment**” **75%**
...meets **my needs** well” **61%**
...is good for **environment**” **57%**
...is for people **without a car**” **56%**

Q6) To what extent do you agree with the following statements about public transport?
Base: all (1003)

Available alternatives

Driving / car share

- Value is significant – implies freedom – can go wherever and whenever
- It's a 'no-brainer'
- Consider cost of parking & petrol, but don't outweigh the independence of your own car
- Benefit of car share with friends, a group activity & cheaper

In rural areas, more willing to walk or cycle for longer distances to get into city/town, before consider other transport methods

- Up to 2-3 miles
- Some are using these methods for getting to school/college/work
- This is normal for them, so not questioned - it's 'just a way of life'
- Offers personal freedom set off and leave whenever choose

Uber

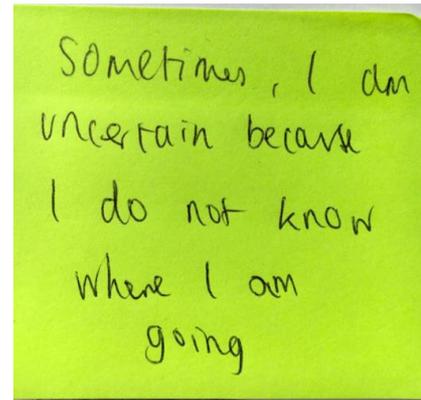
- Real pull for older ages (17-19s)
- So convenient – can see who is in area, can book them in and pay before travel
- No interactions required
 - Even though it's more expensive, some would use this as a first choice if available, as it's so easy
- Good awareness of Uber (14-16's)
 - Not desperate to try it – doesn't factor in their lives just now
- Rural – aware but not available, so don't feel they are missing out

In urban areas, think about walking, but less committed

- How long would it take to walk?
 - Perhaps more frequently – how long to walk to bus stop or train station?
 - Varies from 15-30 minutes

Immediate thoughts on public transport

- **Overcrowded** – lots of other people around
- Have to **mix** with other members of **the public**
- Convenient
- Quick
- Can be **expensive**
- Trains vs buses
- Waiting
- Provides **freedom** to those who are old enough to travel without parents
- For people not old enough to drive/don't own a car



Sometimes, I am uncertain because I do not know where I am going

"You don't want to sit somewhere that is dirty, because you won't want to rest your arms anywhere".

(Norwich, 14-16s)

"On a train you know no one will speak to you, because its like an unsaid rule, but on a bus you are more nervous that someone might speak to you, it's a bit weird that this person I have never met thinks they can have a conversation with me".

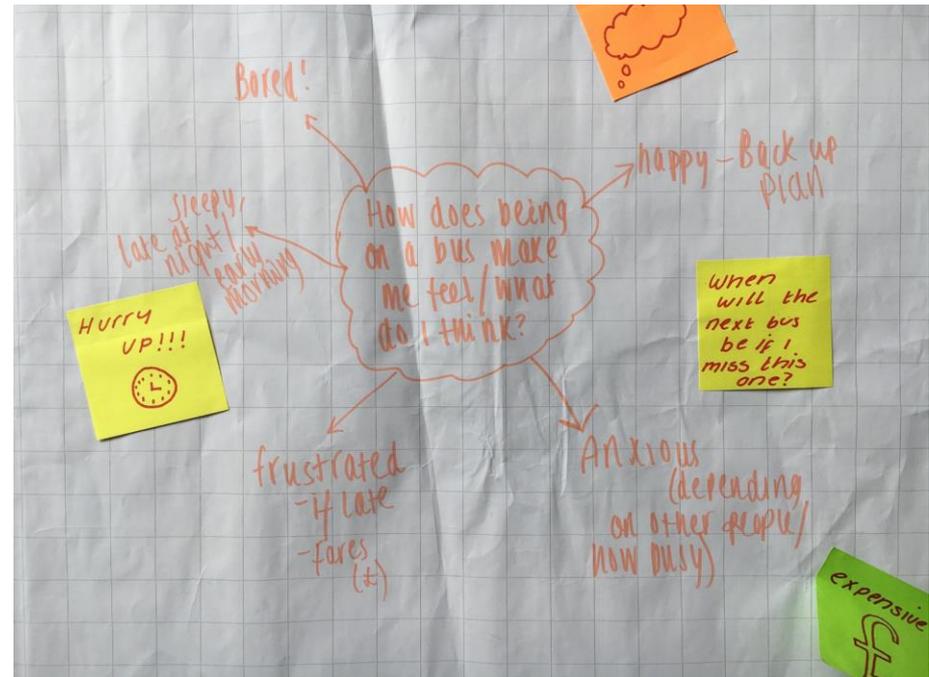
(Essex 14-16s)

"[public transport gives me] Confidence, because you are getting used to travelling on your own".

(Essex, 14-16s)

Immediate thoughts on buses

- Overcrowded
- Dirty
- Unreliable
- Weird people
- Grumpy bus drivers
- Having the right change
- Rattling buses, loud
- Unsafe driving
- A 'last resort'

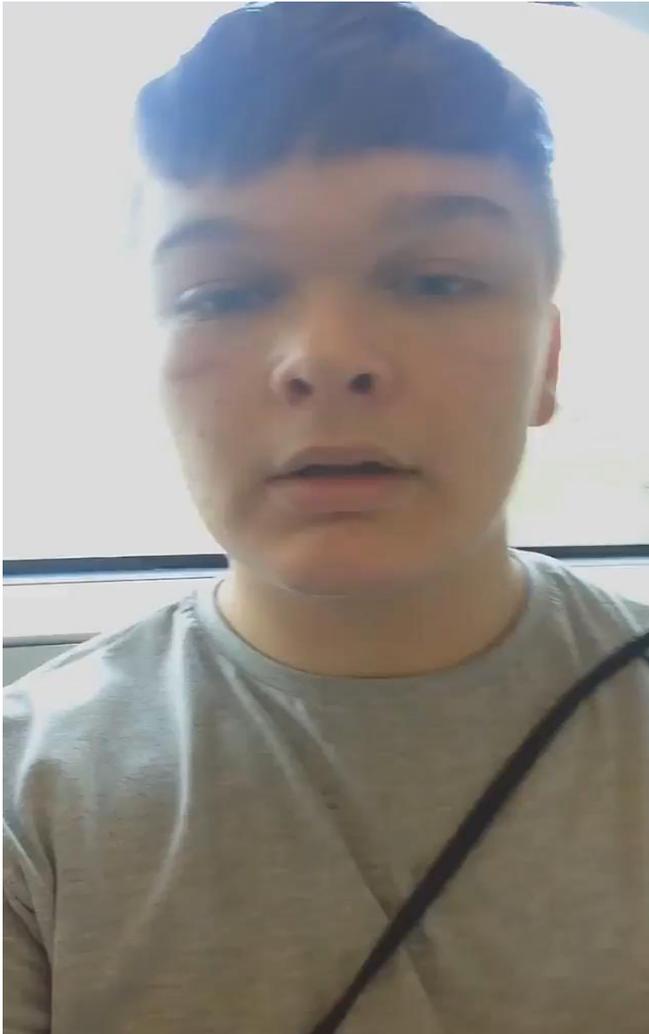


Freedom and fragility

uncertainty and 'what ifs'



Generally supportive of bus network



But some frustrations

“Having a good bus network is important for the local area”

85% agree

“Travelling by bus is a good way to get about”

74% agree

“Buses are the cheapest way of getting to places”

42% agree

Bus users have more positive views

Many pictures – cleanliness is noticed



The role of 'freedom' and gaining independence

- Around 14/15yrs – starting to use different transport without parents. Gaining **independence**
 - Real appeal and like the idea of relaxing, talking to friends, enjoying the journey
 - Initial experiences inform development of attitudes towards buses & difficulties resonate for a while – not easily forgotten
- Getting the bus is a **core life skill** have to learn
 - Early experience can deter future use
- **Real fear factor: want to 'get it right' and not look/ feel silly**
 - How do I get there or find out best bus or route?
 - How do I catch the bus? Where is the stop? Is it safe?
 - How do I know what time will my bus arrive? What if it is late?
 - What do I say to bus driver? What fare am I asking for?
 - How much will it cost me? What if I get it wrong and asked to get off bus?
 - How will I know where to get off? What time are the buses coming back?

"The independence is a big one, being able to get the train and bus on their own is quite cool for young people who are still too young to drive".
(Essex, 17-19s)

Awareness of fares: what and why?

- Real confusion as to: **what fares they should ask for** and **how much these cost**
 - What are these fares called? What am I eligible for if under 16, under 18?
 - If I have a pass in the week, can I use this at weekends?
 - Does one operator charge more than others?
 - Why does the cost keep changing? What are the factor influencing this?
- Why do I have to pay adult fare at weekends if I have a child pass?
- Reported lack of information as to probable fare
- Limited recall of discounts or offers promoted by bus companies
 - However seen them for students, OAPs
- Ads reported on back of buses, inside the interiors and on tickets
- Usually seen as something targeted at others ‘not for them’ so don’t feel their business is wanted

Expense



"You don't really know how much it will cost until you get on the bus, there is nothing to tell you how much it will be".

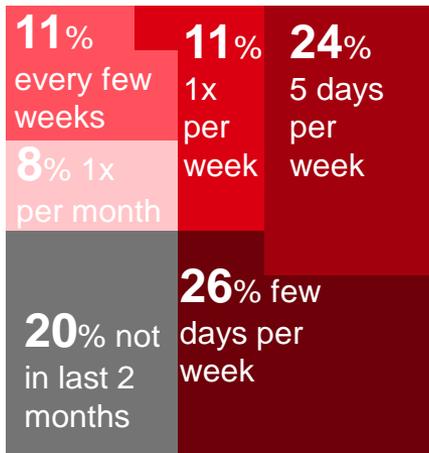
(Essex, 14-16s)

"I think my bus pass for a month would be about £48, which would mean I would get 2 weeks of the month free, but I don't know how to go about getting it. It says the prices online, but doesn't tell me how to get it".

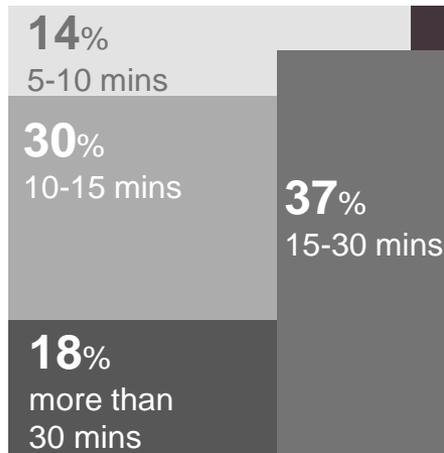
(Norwich, 17-19s)

50% use bus a few days each week

Frequency of bus use



Length of typical journey



Bus travel spend and ticket type

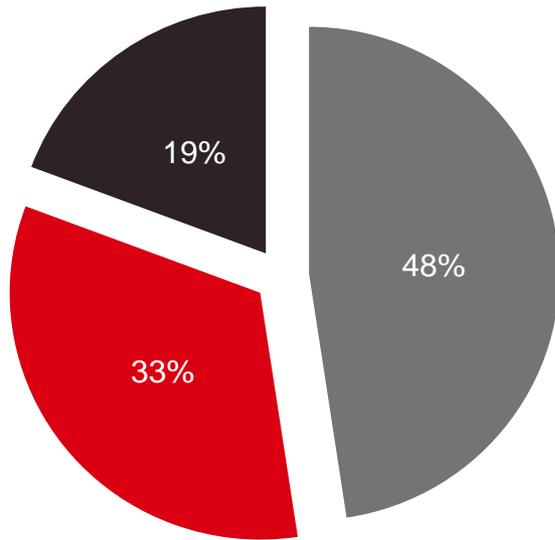
52% buy tickets each **day**
19% have **weekly** pass
9% have **monthly** pass
8% have **termly** pass
12% have **annual** pass
A **quarter** spend more than **£10** per week

“Having a good bus network is important for the local area” **85%** agree

“Travelling by Bus is a good way to get about” **74%** agree

“Buses are the cheapest way of getting to places” **42%** agree

Many young people not sure about special fares available

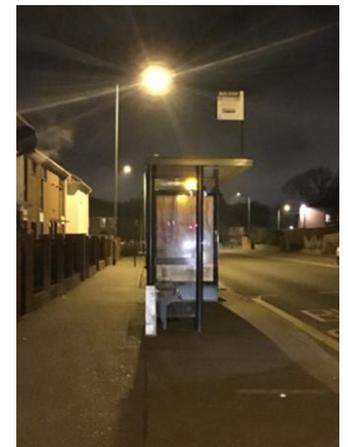


- I know that there is a good range of special fares and discounts for young people like me in my area
- I think there are some good fares and discounts for young people but I'm not sure of the details
- I'm not sure whether there are special fares and discounts for young people

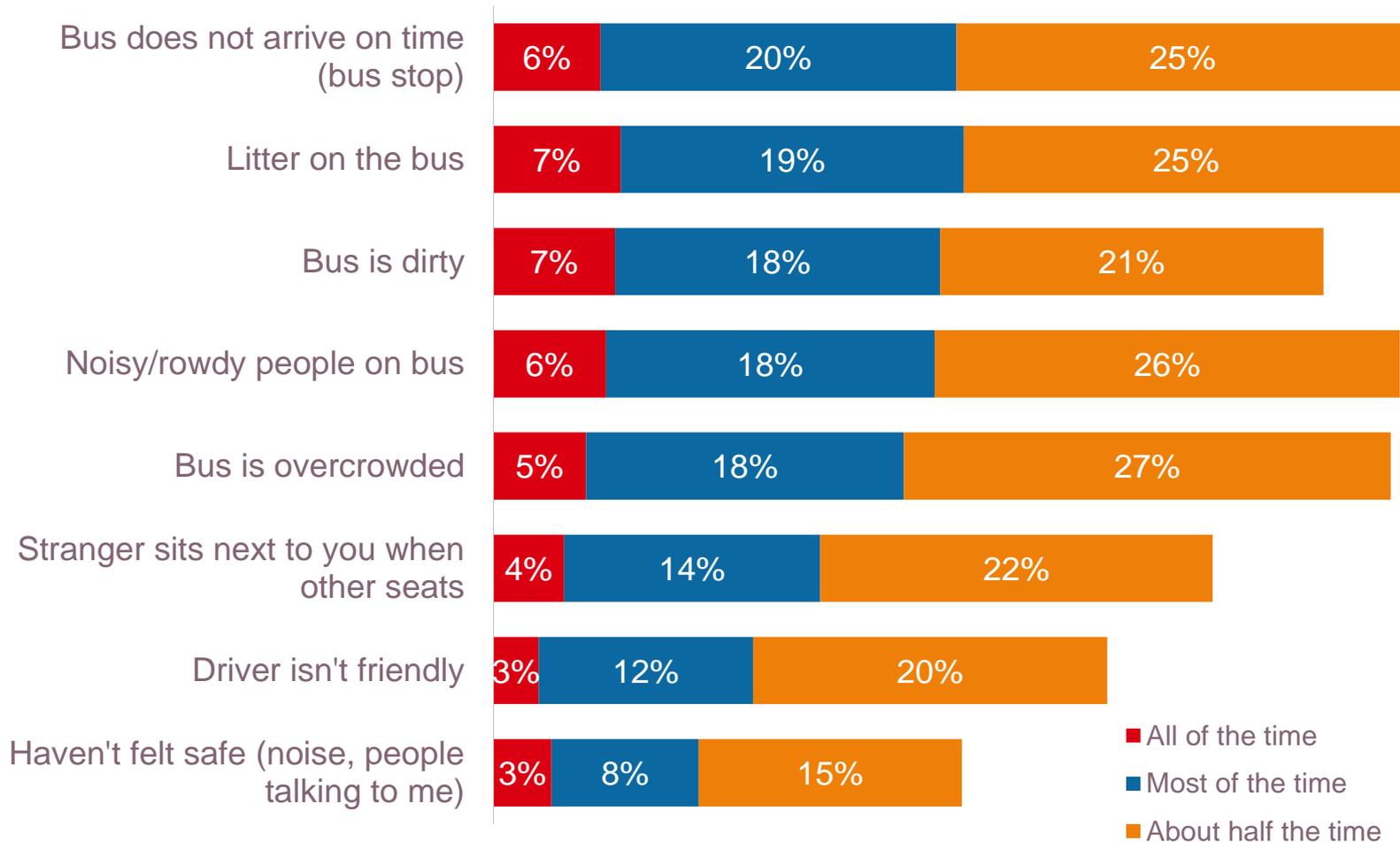
- **48%** feel there are a good range of fares and discounts –positive?
- Other half are unsure as to the details or don't know if these offers are available to them
- Important, considering how just over one third (35%) of survey respondents pay for fares from their own pocket money/money they have earned

The experience starts at the bus stop

- Negative comments about **condition of bus stop and facilities**:
 - Dirty/rubbish lying around/defaced timetables – can't read
 - Frustration where it is just a pole with a sign on it
 - No roof/poor lighting/no live tracker board/no seats
- Will my bus turn up?
 - What if late – what do I do? How do I find out where bus is, why delayed and what time it will get here?
 - A few checking operator apps– **space on mobile is precious and value of app has to be 'earned'**
 - Bus driver drives past them (doesn't stop)
- Getting on the bus
 - Initial experience can impact on the whole journey
 - Very much focussed around interface with the bus driver
 - Asking/paying for ticket: will the bus driver understand?
 - Finding a seat: how busy/noisy is it? Am I comfortable?
- Once on the bus
 - Dirty seats and litter make them feel uneasy
 - Pleasant if bus turns up, friendly driver, spare seats...
- What if it's delayed?
 - Can I see why there's a delay or track progress?



The experience is regularly disappointing



Q15) How often do these happen when you are travelling on the bus?

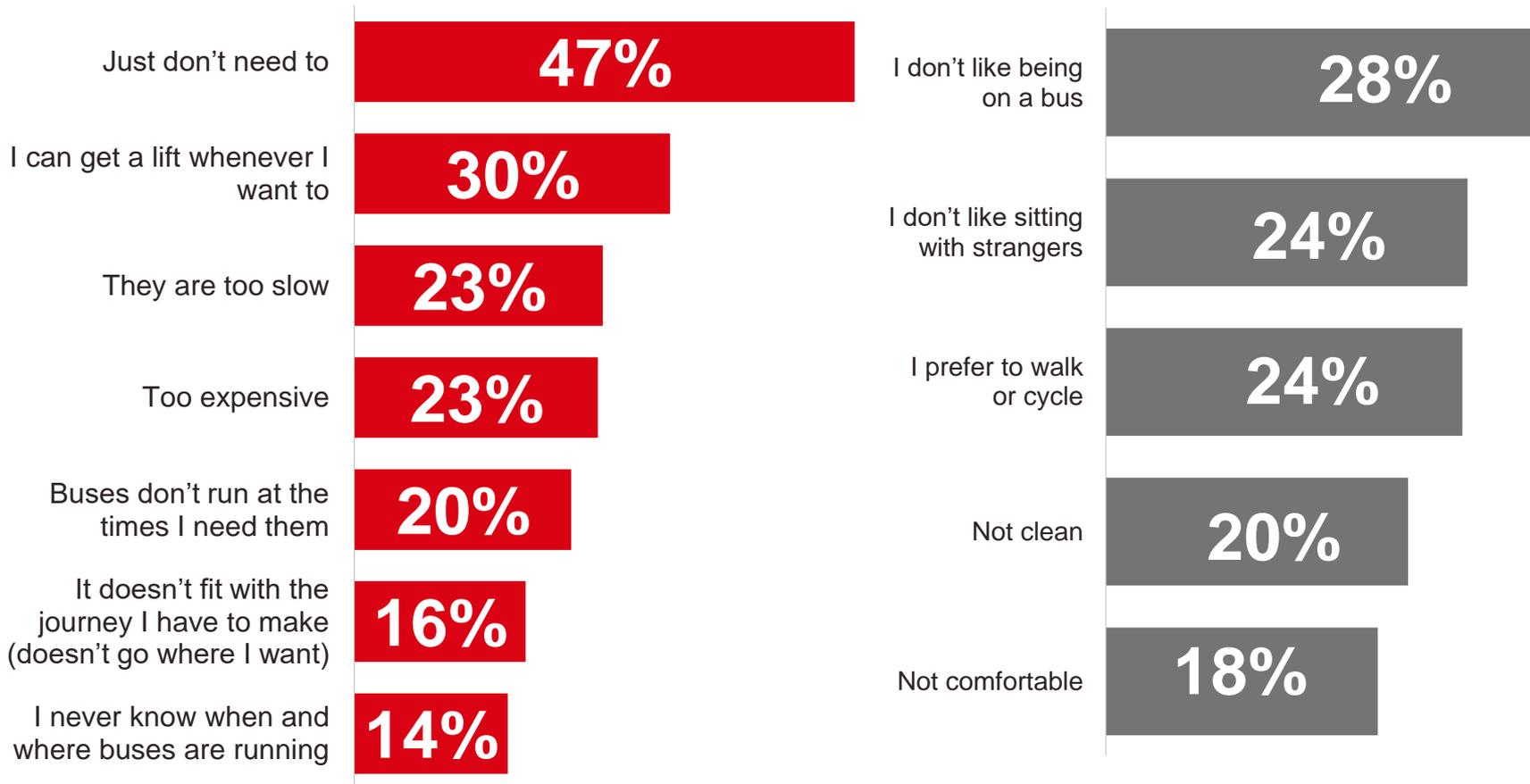
Base: Bus users (807)

Want to spend time on the bus 'usefully'

Common themes :

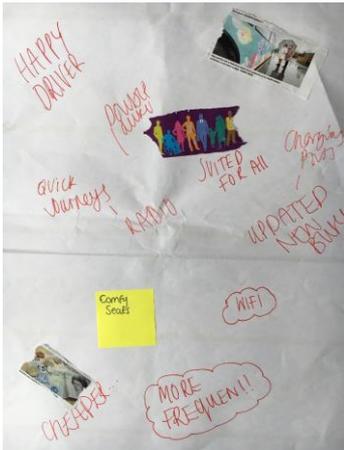
- **Listening to music** (practically everyone mentioned this)
- **On social media** – twitter, instagram, snapchat
- **Talking with friends** on the bus
- **Browsing other sites**
- Charging their phones if have device chargers
- **Looking out of the window** (when listening to music)
- Younger participants can be quite happy to just **look out of the window** if a short journey (10 minutes)
- Older groups were far less willing to do this and would rather distract themselves as much as possible from the fact that they are on the bus
- Few mentioned working/preparing for school or college
- Even when bus has WiFi, can be a fairly slow connection, not fast enough to really get anything done

Reasons for not using the bus



Q20) What are your reasons for not using the bus?
Base: non-bus users (196)

Key features of the perfect bus journey



- Main things are:
 - **Reliability of buses** (turning up on time)
 - **Clean seats and floors**,
 - Comfortable seats (leather effect)
 - Friendly bus driver – smile and say “hello”
 - Device charge points
 - Fast WiFi (fast enough to stream music)
 - Better legroom
 - Newspapers?

“Clean, on time, drivers that greet you, maybe something to do on the bus like the Metro and more reliable, make sure it’s on time every time”. (Leeds, 17-19s)

- However, this in itself is not enough
 - It is also about **communication** of how easy and useful a bus journey can be
 - Digital display boards/live trackers

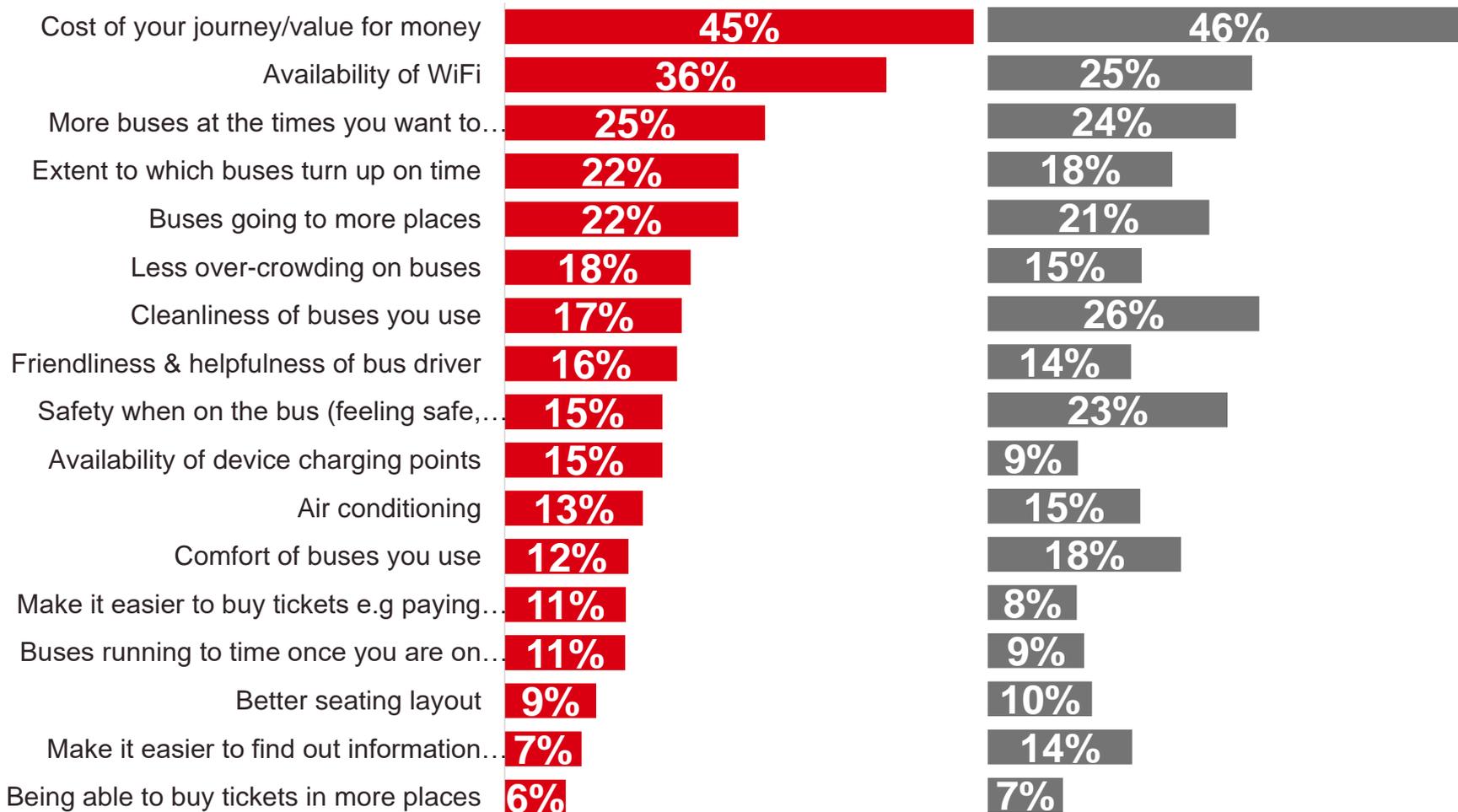
“Would be nice to have something that tells you where you are or when you are getting to a certain bus stop because I had to look on Google Maps on my phone, or at least for it to say the name of the bus stop at the actual stop”. (Essex, 14-16s)

“Air conditioning, charging USB ports, comfortable seats, more room for people standing, and more rails, carpeted floor so it’s not slippery when it gets wet, and cleaned thoroughly throughout the day. More seating at the bus stop with a shelter ...” (Solihull, 14-16s)

Perceptions of operators

- Operators are **making an effort** to make bus journeys a more pleasant experience for everyone. However:
 - General perception that operators are not doing enough to: **a) offer them something that is ‘for them’**; and **b) actually ask them what services and facilities they would like to have**
- Services and facilities not designed with them (young people) in mind
 - Older people, people with kids happier to just sit there, but they want to be occupied
 - Not convinced that operator considers their requirements for different fares
- Suggestions for asking their thoughts:
 - Interact with them on social media
 - Use pop-up surveys
 - Details on back of bus ticket for online survey
 - Ask them to fill in short questionnaires (paper) on bus
- These could be incentivised through offering a prize draw of free monthly passes or other money off deals for people their age

Desired improvements are clear



Q23) If bus operators were to improve their bus services, what top 3 things should they prioritise?

Base: bus users (807) ; non-bus users (196)

Key requirements for the bus industry

1. Teach young people about **how transport systems work**
 - Where to go and look & what to do. Effective communication channels with
 - Make it simple to understand
2. Build **confidence** around what to do
 - Relieve anxieties
 - Don't assume they know what to do
3. **Design** systems **better**
 - Provide easy to find, centralised and streamlined information, visual map, detail on fares – with the ability to personalise
 - Minimal interaction needed, but make it more like other experiences, e.g. cinema, working easily on mobile with ticket purchase and activation
4. Improve the **journey experience** – tackle perceptions
 - Resolve issues with crowding/timekeeping – real time information at stop/on-board
 - At stops/on bus
 - Approachable drivers, information on-board
5. **Review fares** for young people
 - Consistent and logical fares for young people
 - How to find the 'best ticket' can I use my pass? – properly targeted promotions
 - Easy to find the cost, buy ticket and pay



Harvey Morton, Youth Employment UK

A young person's view



Catriona Henderson, Head of Buses & Taxis, Department for Transport

Keynote presentation



Full driving licence holders aged 17-20 by gender: England, 1989/91 to 2015



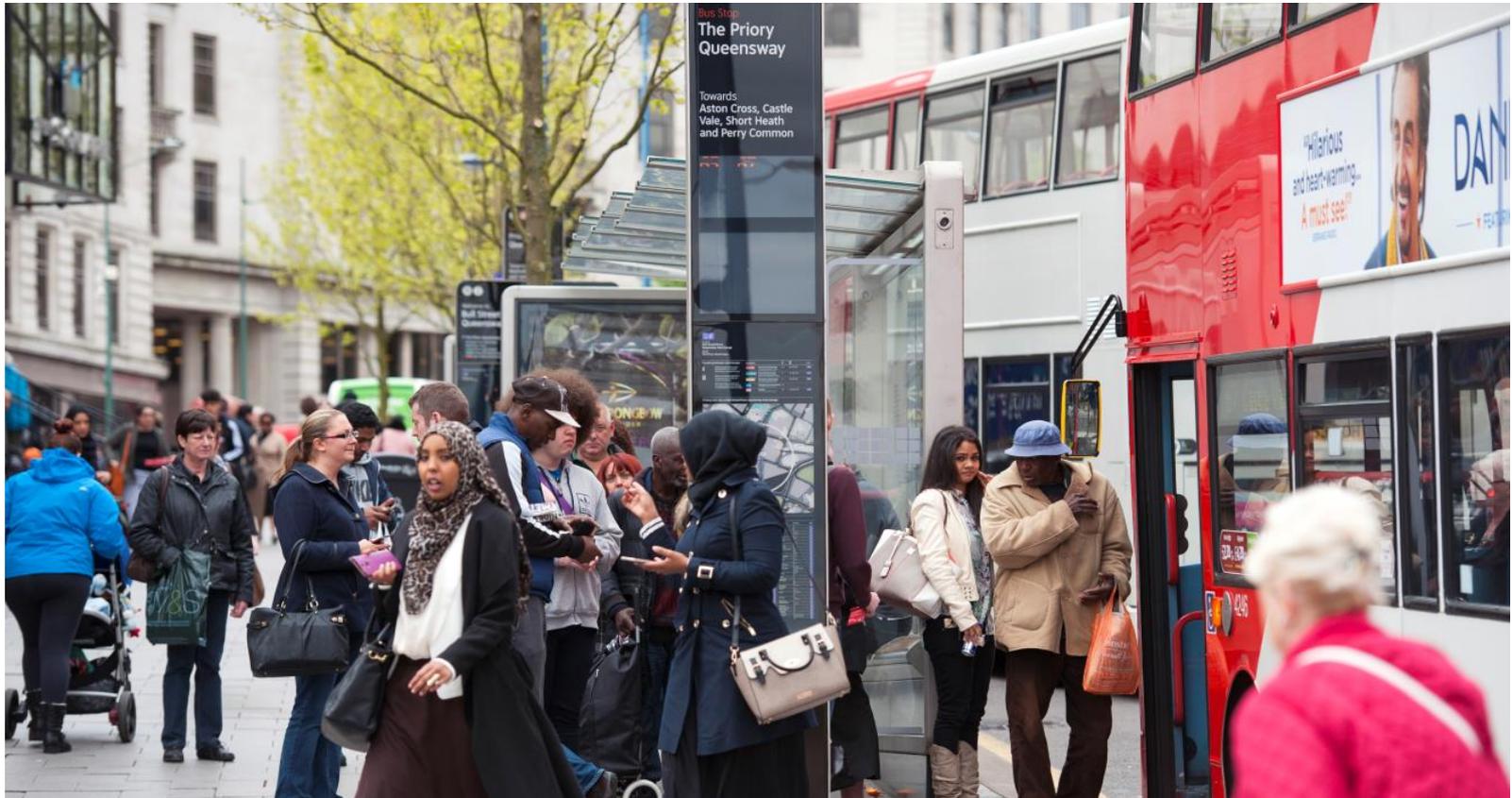


Department
for Transport



Bus Services Act 2017

- ▶ Improving information for passengers
 - ▶ Open data programme
 - Real time information
 - Journey planning
 - Fares
 - ▶ Accessible on-board information
- ▶ Options for LAs and operators to come together
 - ▶ Enhanced partnerships
 - ▶ Advanced quality partnerships
 - ▶ Franchising



Matt Goggins, Head of Bus Merseytravel
Liverpool City Region Bus Alliance

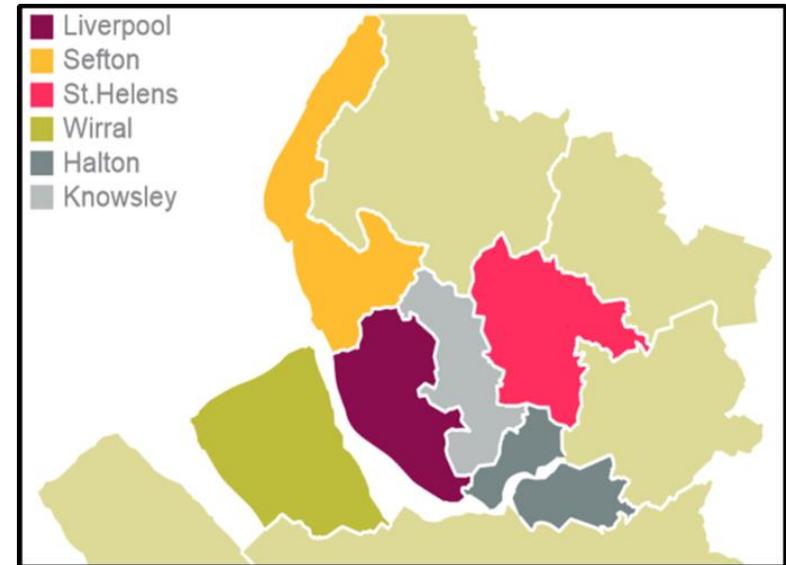
Prioritising Young People: Buses in the Liverpool City Region

Matt Goggins – Head of Bus, Merseytravel



Buses in the Liverpool City Region

- 140m bus journeys each year
- Each day, buses take over 60,000 young people to their place of education in the LCR
- Merseytravel spends around 30% of the “bus budget” on services to schools
- Many more young people use the bus to get to work – commuting by bus twice the national average



Why Young People?

- Young people had a poor deal for too long in the LCR
- High levels of absenteeism at schools, particularly later in the week – transport affordability cited as a problem
- Young people identified as key to turning around the long term trend in patronage decline – bus customers of the future

How did we do it?

- Affordable travel pledge from LCR political leaders
- Engaged young people themselves – didn't decide and impose
- Liverpool Youth Parliament played a key development and advocate role
- Liverpool City Region Bus Alliance formed, with a focus on customers – in particular young people
- A range of improvements to the bus offer made



What did we do?



- Fixed product gaps – introduced Myticket and simplified other multi-operator products
- Myticket – any operator, all-day, £2
- Increased young person eligibility to include 16-18 year olds – all operators and Merseyrail
- All operators introduced principle of 50% off adult fares for young people
- Other enhancements to the bus offer, including 100% WiFi, USB charging and driver training

What was the impact?

Simple, affordable offer delivering significant **passenger growth**:

- **142% increase** in bus journeys made by young people – YOY growth over 3 years
- Around **10 million** additional bus journeys per year

What was the impact?

Simple, affordable offer delivering significant **growth in customer satisfaction**:

- Overall satisfaction (16-18 year olds) **86%** = **4%** YOY improvement and **8%** higher than peer group
- Satisfaction with value for money (16-34 year olds) – **13%** increase over 4 years – **5%** higher than peer group

Thank you



Simon Pearson, Commercial Development Director,
First Bus UK

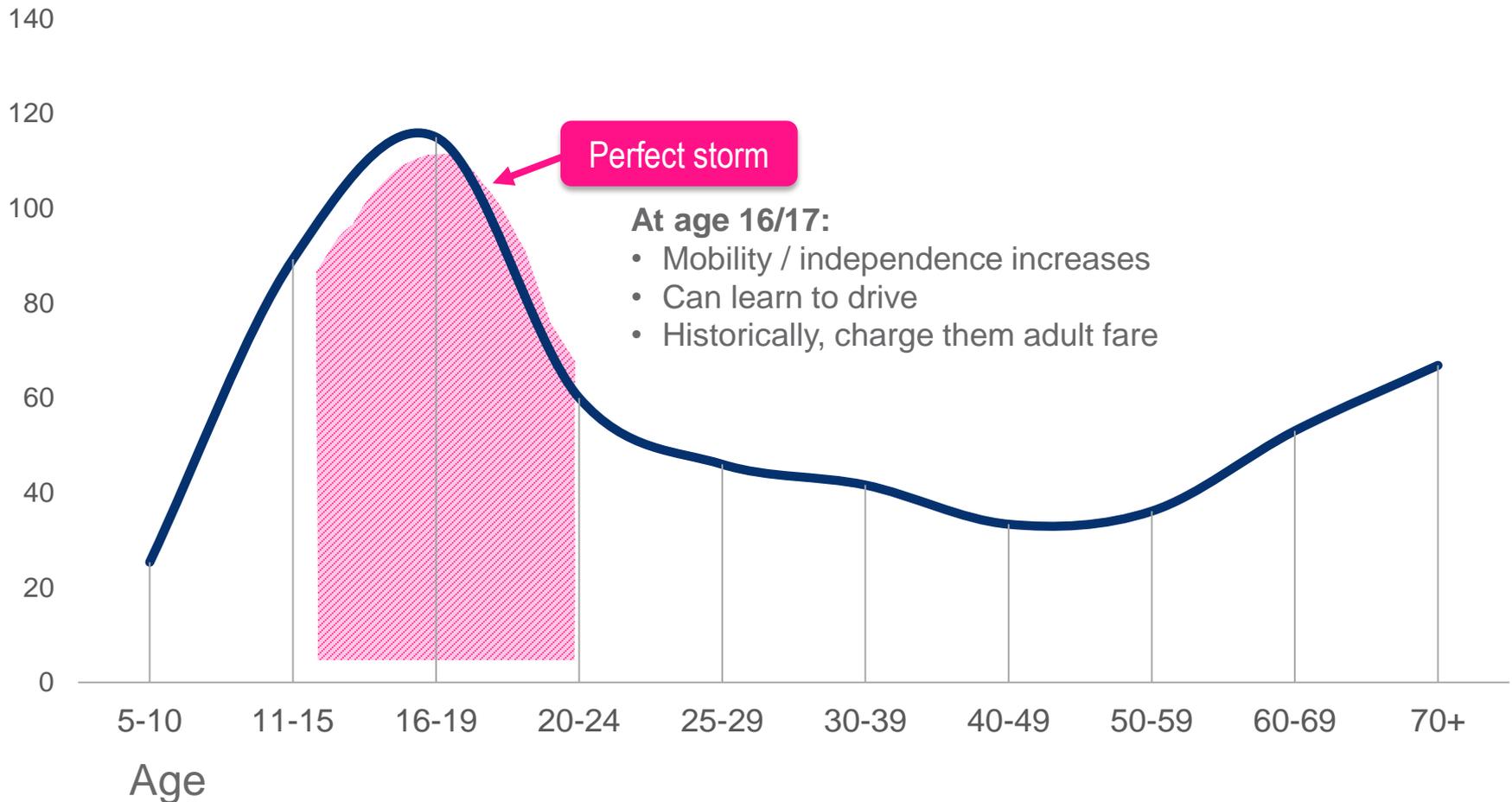
Customers of the Future

Simon Pearson
Commercial Development
Director
First Bus

Young People: The Opportunity

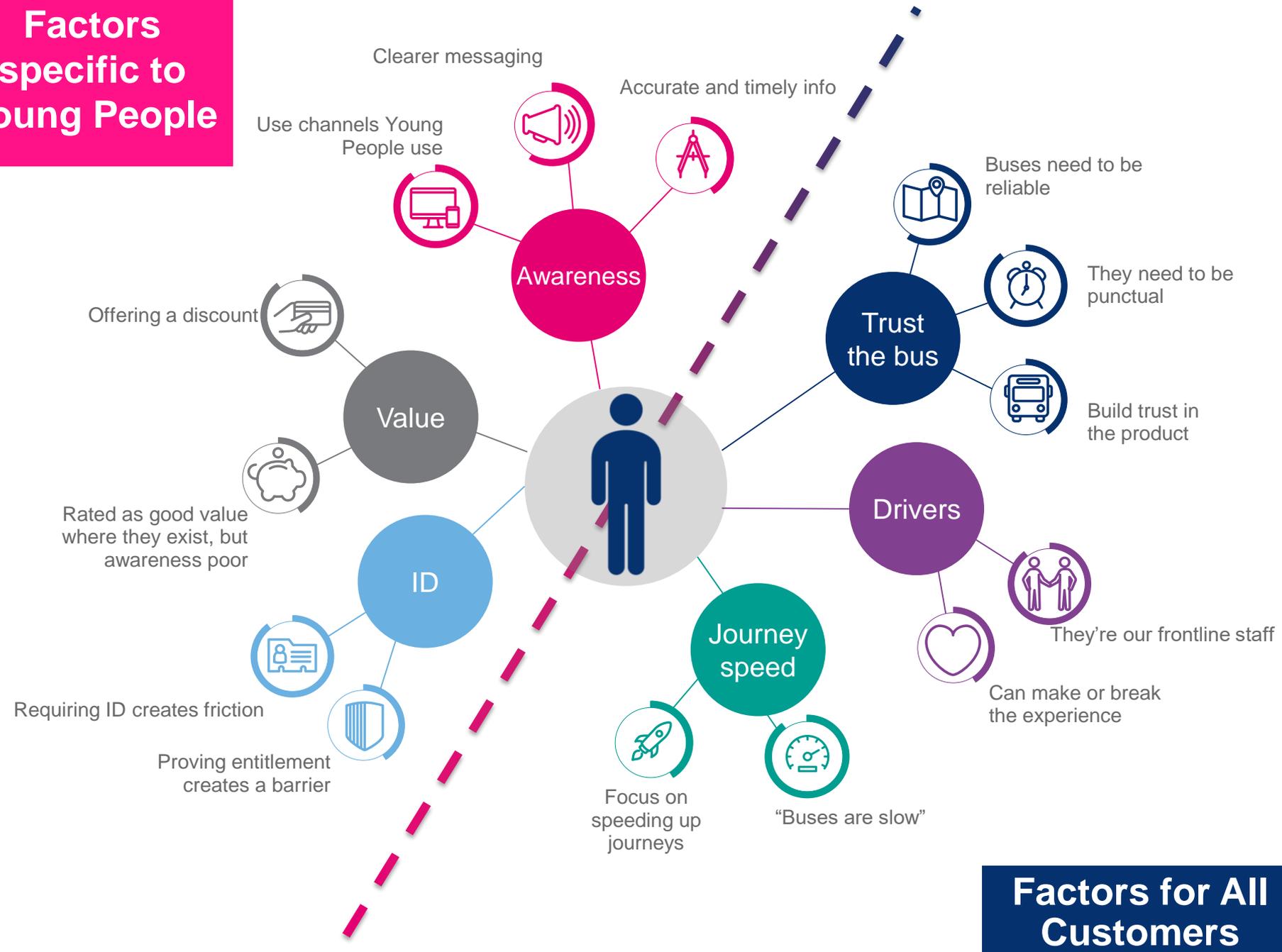


National Travel Survey: Average annual bus trips by age



Source: Based on 2015 NTS, London stripped out

Factors specific to Young People



Factors for All Customers

What Have We Done?

Research → Trials → More research



Customer **First** HUB

Solid research base driving trials to test & learn



Sheffield Bus Partnership

FREE —
YOURSELF

16-18?
Need a lift?

Go by bus

all
week
just

£10

What Have We Done?

Product Trials



Greater Manchester £10 Week product for 16-18s

01



Mobile only ticket

02



No ID requirement

03

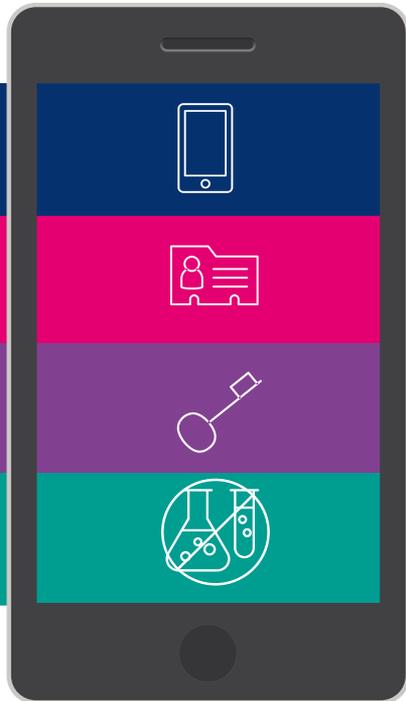


Made it accessible

04

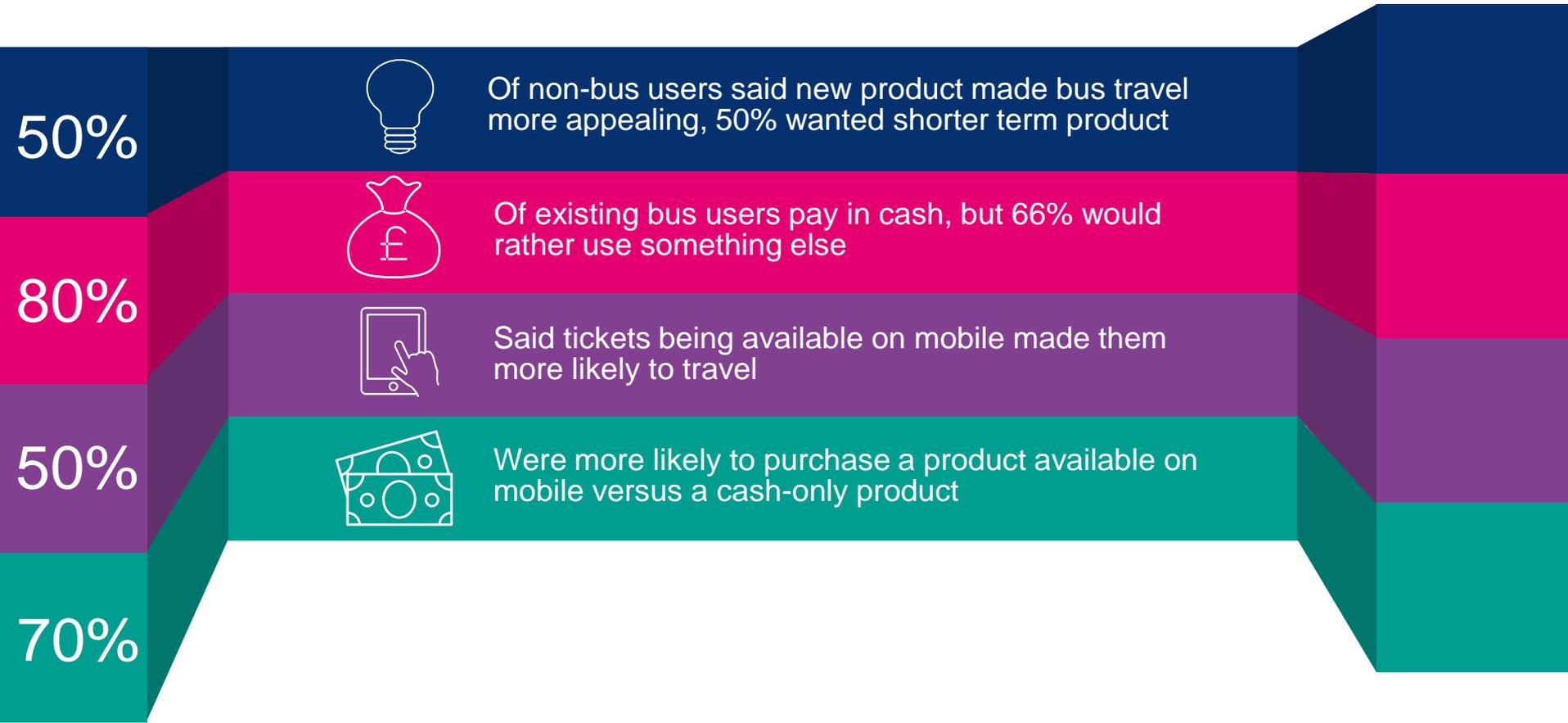


Kept it easy to understand



What Have We Learned?

Product Trials



Moving Forward

What Next?



Remove barriers

Remove barriers on price & ID
and work on communication

Keep it simple & consistent

Be bold!

Focus on long term
opportunity, not this
year's budget

Work collaboratively

Operators & LAs working
together



Dave Pearson, Director of Transport Services West Yorkshire

Combined Authority

Bus 18 Partnership



Transport focus – young people

Dave Pearson,
Director, Transport Services

Young people's expectations are the same as everyone else's

Cost

- Young people have limited disposable income
- Cost of travel can influence learning/lifestyle choices
- Taxis/Private Hire are viable when travelling in groups

Complexity

- Multiple ticket products leads to lack of confidence they are getting best value
- Need to present an eligibility pass to obtain half fare
- Bus travel looks complex if you are not familiar with the routes/timetables

Confidence

- They want a reliable, punctual service
- Interaction with drivers can put some young people off

Change as a result of consultation

- Engagement in designing the service to meet their needs

Bus 18

Informal public/ private sector partnership to:

- Make buses easy to us
- Reduce emissions
- Improve customer experience

Achievements to date:

- Concessionary fares extended until 19th birthday
- Last bus guarantee and no quibble approach to customer complaints
- Investment to address punctuality hotspots
- Network stability agreement – reduce service changes and consult
- Eco Stars identification of bus environmental performance
- Improvements to on line and at stop information



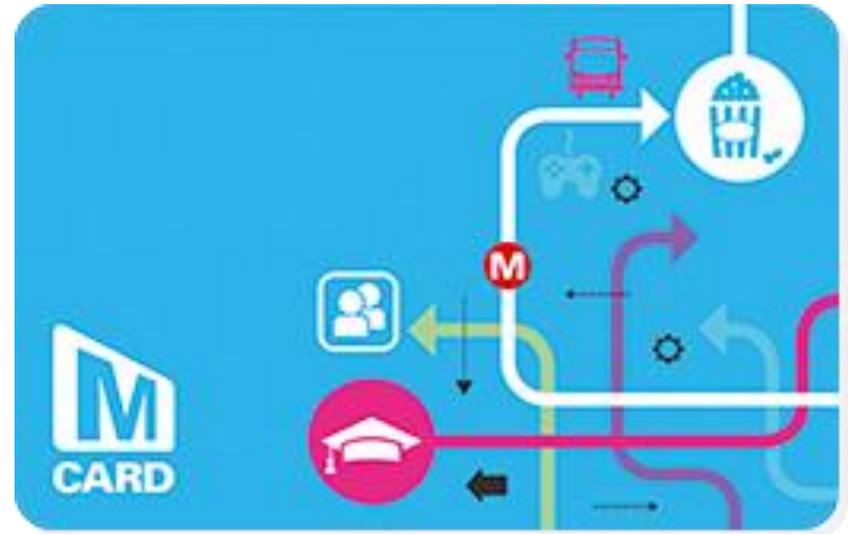
Our ticketing offer

Concessionary Fare Scheme £10m pa – requires proof of entitlement

- Approx. 50% cash fare/day tickets
- 74% saving on monthly Mcard

Mcard – smartcard scheme, 0.25m young people's journeys per week, new top up app very popular

What about the young people who don't use the bus to get to school/college/training?



Is proof of eligibility a barrier to young people's travel?

- In West Yorkshire half fare only if carrying a photocard - even if they were in school uniform
- Young people said this doesn't make sense – it doesn't
- We put it right through **Bus 18**



Next steps for us

- Bus 18/Combined Authority focus on young people – particularly those who do not use the bus now
- “Go anywhere” multi operator ticket – promotion aimed at infrequent travellers
- Simplification of ticket product range and proof of eligibility only need for over 16s
- Focus on role of the driver in making bus travel appealing/less daunting to young people
- Further involvement of young people in decisions about transport



Stephen King, Head of Commercial and Retail, Go North East

£1

**any journey,
any time**

for all aged 18 and under



North East

Journeys taken care of

How did we get there?

- One of the first operators to extend young persons discounts to under 18's in 2011.
- Popular Get Around scheme with thousands of cards in circulation – with an admin cost of £30k pa.
- Investing heavily in the “product” – vehicles, free wifi, USB power, apps, information – customer services.
- However, complex time bands and ID card requirements made it difficult to understand and as a result sales of Get Around products were in decline.



How we did it?

- Talked to our customers - asked those already registered on our Get Around ID scheme what they thought.
- Listened to our customers - we ordinarily get around 10k pieces of feedback a month.
- Asked existing and potential customers - carried our market research in person on the street, online and on social media.
- Talked and listened to our staff - we have 1600 drivers, many are parents.



Marketing and communication

- Simple messages and strong imagery are a key part of our campaign and strategy.
- Adding the £1 single fare to our app with the ability to gift tickets has been a huge benefit.

Media used

Website • Cinema • Digital • AdWords • Display
Behavioural Targeting • E-mail • Radio
Social Media • PR • Spotify • Local Press
Flyerpower • Posters

Target Audience

- People aged 18 and under
- Parents – ticket gifting via the app



The Results

- Masses of positive feedback about the scheme - not just the £1 fare but our investment in our services and the ease of the app.
- Anecdotal feedback from parents suggesting they are now actively encouraging their children to use the bus because of its simplicity.
- We're now an influencer for young people generally and their transport needs - not just within the transport sector.
- There is now double digit growth on young persons fares where before the scheme this was in decline.
- Mobile app downloads and ticket sales are also enjoying double digit growth.
- Research in some areas shows that people favour our services due to the £1 fare and free wifi - and in some cases walk further to use a Go North East bus.





Amanda Thomson, Director, Campus Media

Working With Youth Markets



- For millennials and generation Z, social media is essential to maintaining and building relationships. Brands are able to benefit from this digital social landscape because it provides a space for communication and builds a community.
- Influencer marketing is a great vehicle for increasing awareness of your brand, particularly to the 16-30 year old market. It's well known that people buy on recommendation from their friends as it is a trusted source.
- In 2017, we saw brands begin to operate in a more human-like way than we've ever seen before. This is because they have grown savvy to the fact that how they express themselves through their product, communications and social actions creates an image and personality that shapes the relationship consumers build with them.
- In October 2017, Campus Media surveyed 500 undergraduate students to analyse what perceptions they had of 10 big name brands. We then decided that the best way to measure this was to assess how students envisioned a brand through their personality traits, gender, age and lifestyle.
- We even asked questions about the habits and hobbies they imagined the human brands to have, such as "What music would they listen to?" and "Where would you catch them hanging out?". With this data we found we were able to build up a strong character profile of our brands and highlight some of the key influential factors of brand image and personality in 2017. This report aims to help others strengthen their own image.

Meet The Brands



TFL has a cringe-worthy sense of humour and you wish it didn't make you laugh, but it does. They are a planner and therefore very predictable in their behaviour. Pigs were flying the last time TFL broke their routine. They will try to avoid conflict at any cost, which means that to keep the peace they may tell a little lie. The dog didn't eat that last bit of pie you left in the kitchen, TFL did.



77%
SAID THEY
KNOW TFL.

TOP 5

PERSONALITY TRAITS:

- ✓ Trustworthy
- ✓ Boring
- ✓ Cultured
- ✓ Confident
- ✓ Dishonest

95%
SAID THEY
KNOW
NATIONAL
RAIL.

TOP 5

PERSONALITY TRAITS:

- ✓ Boring
- ✓ Confident
- ✓ Arrogant
- ✓ Intelligent
- ✓ Cultured



Everyone knows a National Rail. He's sat in the corner of the family function with a whisky on the rocks reminiscing about the 'good old days'. He comes across as slightly stubborn at times, but he is simply set in his ways and happy to spend the rest of his life doing his favourite activities – reading the newspaper and performing soliloquies about how he'd fix the country if he were in charge.

97%

SAID THEY
KNOW BRITISH
AIRWAYS.

TOP 5

PERSONALITY TRAITS:

- ✓ Confident
- ✓ Easy going
- ✓ Optimistic
- ✓ Impulsive
- ✓ Upbeat



British Airways has an air of confidence about them that causes you to believe whatever they say. They have the facts to back up their arguments and they can sound like a walking Wikipedia. Despite this, they are still charming and a great conversationalist. British Airways is a hard worker and has always been fuelled by a love for travel, because of the great people that it allows them to meet.

How To Engage and Succeed



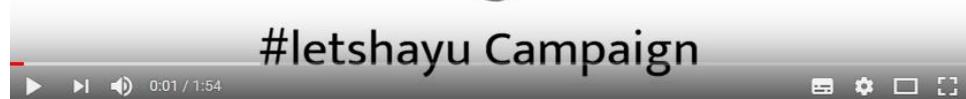
For the Hayu campaign, we recruited student influencers who were a natural personality fit to the tonality of the campaign and the overall voice Hayu wanted to convey. Fun loving, Influential, energetic and trendy.

It was vital to recruit “true” ambassadors – those that loved Reality TV because ultimately their passion is contagious. It is important to make your vision relative to their world. We designed the Hayu campaign to incorporate a mix of Influencer marketing and experiential activity at targeted universities based on geographic coverage. This gave HayU much higher positive engagement in their brand.



hayu.

#letshayu Campaign





Paul Corcoran, Managing Director, Agent Marketing



David Sidebottom, Director, Transport Focus

Q&A



Using the bus: what young people think

Thank you!