

Bus passengers' priorities for improvement and trust research

Transport Focus
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Background and objectives



Background to the research

- Bus passengers represent a large component of Transport Focus's broad remit in terms of representing the needs of passengers and road users. While there is already considerable research information available on bus passengers, a need for a comprehensive piece of qualitative research was identified to complement and update previous research on priorities for bus users.
- A report that looked at passengers relationships with the rail industry was produced in 2014, and Transport Focus would like to be able to compare and contrast between the perspectives of the bus passenger community and the train passenger body.
- Combined with an ever-changing political landscape that requires Transport Focus to have a robust basis on which to develop policy stances; the convergence of a range of needs requires a study that captures deep, qualitative and updated understanding of bus passengers' needs and perspectives.



Objectives

- The overall aim of the research was to understand the range of motivations and underlying complexities behind the needs and priorities of bus passengers. In addition, Transport Focus wanted to test the list of priorities identified in the 2010 study with bus passengers to fully understand its relevance today.

- The specific output objectives were as follows:
 - a) Test the relevance/update the 2010 list of priorities for improvement
 - b) Establish how the local bus network fits with travel needs and uncover key motivations for bus usage
 - c) Discover passengers' understanding of who they believe runs the bus network
 - d) Understand passengers' functional and emotional opinion of the steps in their bus journeys – and how they map to positive or negative perceptions
 - e) Learn how passengers assess 'trust' in the bus service, and linkage to feeling valued and having affinity to the service provision and
 - f) Obtain a high level view from non-users on perception of bus travel.



Methodology

- In order to fully capture bus passengers experiences on bus routes and test the relevant information, a phased approach was required that consisted of:



Pre-tasks

Each respondent was given a paper diary to complete with reference to two journeys they made in the lead up to the group discussion. They recorded the entire door-to-door experience capturing the reality of making journeys in as detailed way as possible. Autographer devices were also distributed to certain participants in the group to give us more of a natural understanding of an individuals journey through photos that are GPS "tagged" to various points in a bus journey.

Pre-group self-completion

This involved a single page task for each respondent to complete individually and was focused on the ranking of the 2010 priorities in terms of importance/relevance.

Group discussions and depth interviews

A total of 12 groups were carried out that were spread across six different varied geographical locations, bus user typology, age and gender.

The discussions also included two groups of lapsed/infrequent users.

There were also six depth interviews with disabled passengers split across geographical locations.



Research Schedule

- The complete, detailed schedule of focus groups carried out between 6 and 14 July

GROUP NO.	GROUP LOCATION	BUS USER TYPE	DEMOGRAPHICS
1	Maidstone	Occasional/non-user (every 3 months, or less often)	18-30
2		Leisure/frequent (one day a week or 4 days a month minimum)	18-30
3	Sheffield	Commuter, working (3 days a week or more)	50+
4		Occasional/non-user (every 3 months or less often)	30-50
5	Bristol	Commuter (3 days a week or more)	30-50
6		Young/leisure/less frequent (less than 4 days a month, but at least once every 2 months)	18-30
7	Reading	Leisure/less frequent (less than 4 days a month, but at least once every 2 months)	50+
8		Less frequent commuter (1, 2 or 3 days a week)	18-30
9	Lincolnshire	Leisure frequent (one day a week or 4 days a month minimum)	50+
10		Leisure/less frequent (less than 4 days a month, but at least once every 2 month)	30-50
11	Manchester	Leisure/frequent (one day a week or 4 days a month)	30-50
12		Commuter (3 days a week or more)	18-30

Overview



Drivers to bus use are largely consistent, with some regional variation

Reasons consistent across all locations include:

- ✓ good value for money (compared to other transport options (including driving/parking))
- ✓ reliable/hassle-free service
- ✓ relatively comfortable
- ✓ convenient pick up/drop off points
- ✓ large integrated network.

In cities where there are other options such as rail and/or tram, buses frequently chosen for:

- ✓ economic benefits (cheaper)
- ✓ greater comfort/less 'crushed' at busy periods
- ✓ collection and drop off points are closer to home/destination
- ✓ later running services at weekend.

In rural areas, lack of other options is frequently the lead reason for bus patronage:

Bus use tends to be very habitual, with most expressing a clear preference between bus, train and tram, and sticking with their chosen mode.

In comparison to other modes of transport, bus competes best on price and convenience

- Perceptions on modes of transport are dependent on region:



The local tram network – Manchester, Sheffield

- ✓ The service is seen to be better with extra conductors on-hand to deal with customer queries
- ✓ The environment is regarded as less crowded, cleaner and more comfortable
- ✗ The network doesn't cover many residential districts



The local train network – all regions

- ✓ The staff are seen to be more professional and helpful
- ✓ The environment is seen as cleaner and more comfortable
- ✗ The network isn't very extensive
- ✗ The price is much higher
- ✗ The service can suffer from delays and cancellations



Personal car use – all regions

- ✓ Accessible and convenient
- ✓ Clean and comfortable
- ✓ More autonomy and control
- ✗ Expensive car parks
- ✗ Car journeys have the potential to be stressful and full of hassle



Taxi use – all regions

- ✓ Accessible and convenient
- ✓ Clean and comfortable
- ✓ Security
- ✗ Expensive fares

The majority of people see the bus as the least 'appealing' mode of transport in their area but it wins over the tram and train networks because of the rational benefits of good value, convenience and predictability through its extensive local network. It also can also, on occasion, provide a less stressful experience than car use.



However, even loyal passengers have plenty they would like to change about bus travel

There is a stigma attached to bus usage, with most associating it at some level with 'budget' transport and its usage by children and the elderly on free passes serves to enhance this in some regard.

The trade-off for affordability and convenience is generally seen as:

- Varied adherence to timetables/some services cancelled altogether
- Unpredictable journey length, with unexpected delays fairly frequent
- Crowded travel environment (peak times)
- Risk of anti-social behaviour from fellow passengers (with nothing done about it)
- Unprofessional/unhelpful bus drivers
- Sense that some buses are old/dirty.

Reflecting this stigma, the research highlighted that bus transport has a number of negative emotional connotations for both users and non-users alike. These include:

- ✗ Crowded and uncomfortable environment
- ✗ Unhygienic and untidy environment
- ✗ Anti-social passengers
- ✗ Unprofessional/unhelpful bus drivers.



Associations with bus travel: rational and emotional factors become hard to distinguish



Key: larger words = more mentions



Factors in bus journey experience

- Typically a good or bad bus journey is made up of a number of sequential events and each event has a number of factors that have the capacity to create a good or a bad bus journey.



Bus stops

- ✓ Punctual buses
- ✓ Access to relevant and clearly displayed information concerning

- ✗ Late running/no show buses
- ✗ Lack of or hard to decipher information



Bus drivers

- ✓ Friendly and helpful bus driver
- ✓ Willingness to engage with the bus user
- ✓ Provides communication throughout

- ✗ No basic recognition or greeting
- ✗ Driving away before passengers can sit down
- ✗ No reasons given for changes/interruptions to journey



Bus environment

- ✓ Brand new buses
- ✓ Off peak- available seating
- ✓ Clean and tidy
- ✓ Well ventilated

- ✗ Cramped, crowded environment
- ✗ Full of rubbish and litter
- ✗ Unpleasant, hot and smelly environment



Bus passengers

- ✓ Quiet passengers
- ✓ Elderly passengers

- ✗ Anti-social passengers
- ✗ Crowds of school children

✓ *"Typically there is a bus every 5-10 minutes in the morning so I can always rely on it to get to work."*
30-50, commuter, frequent

✗ *"The driver didn't even acknowledge me."*
50+, commuter, less frequent

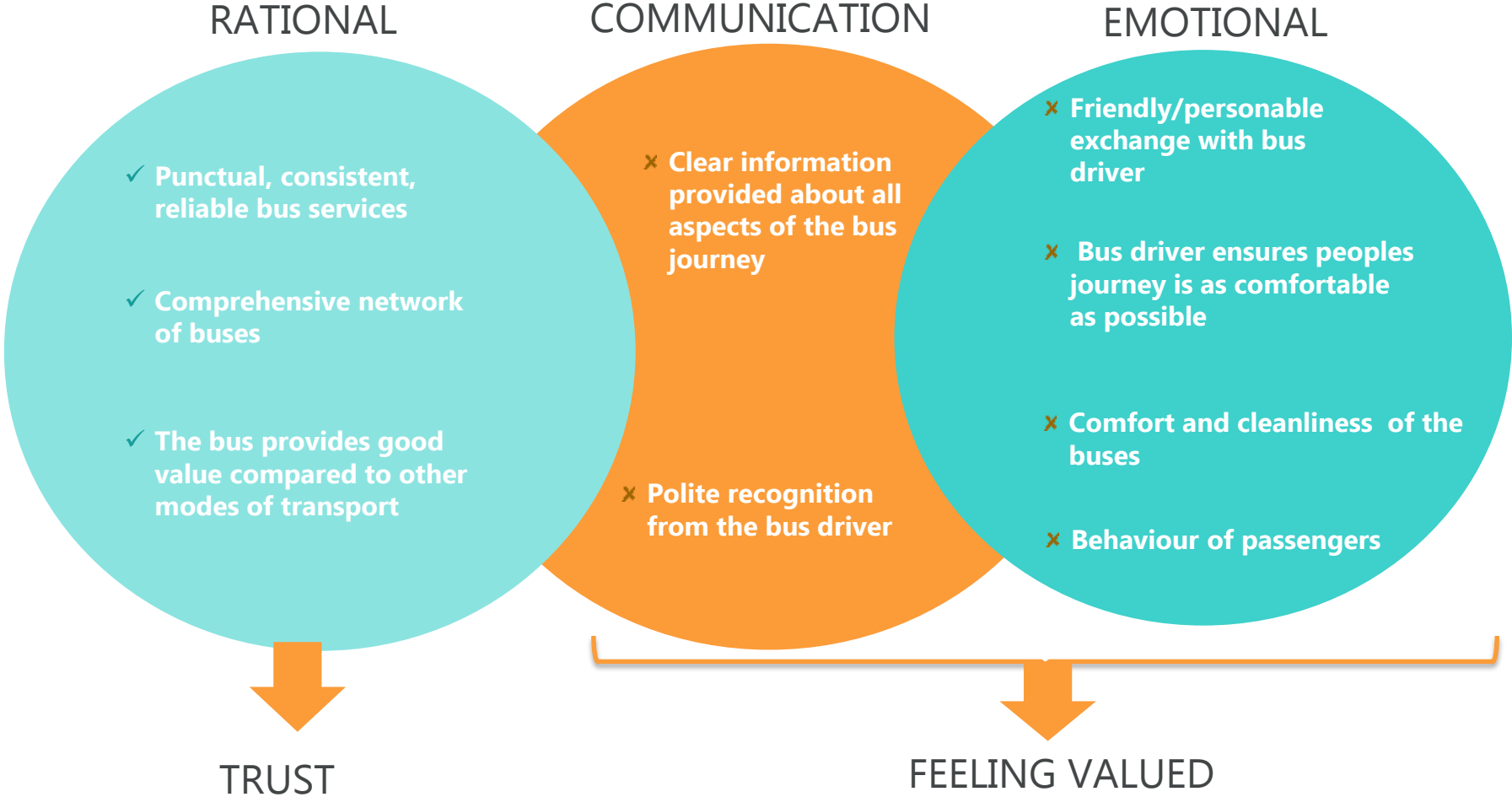
Big versus small impact: typically smaller events over time tend to have a greater effect on passengers perspectives of the bus than one off larger events, about which many are understanding and sanguine.

Passenger's relationship with the bus service – moving from trust to value



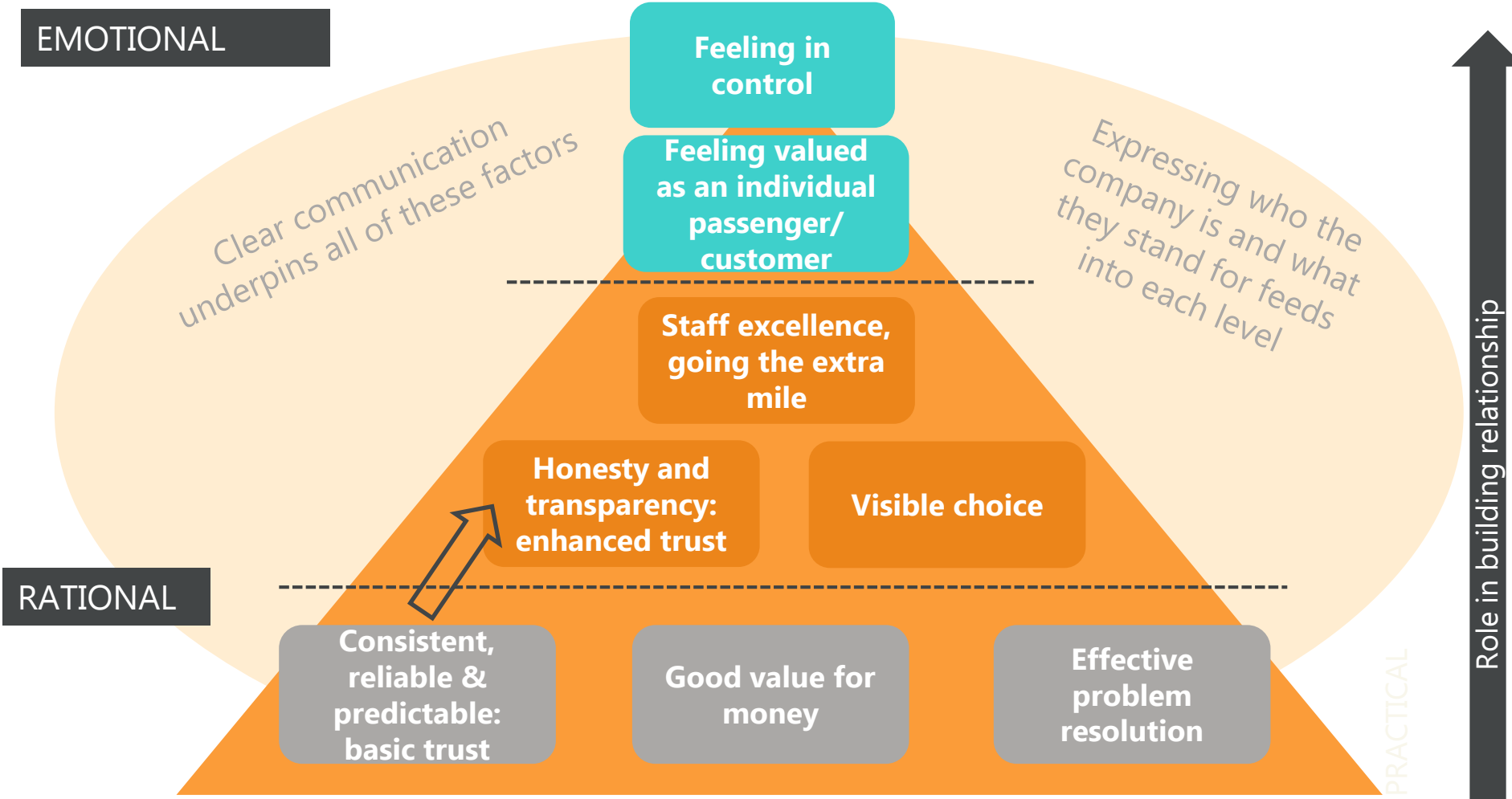
Bus journey experiences blend the rational and emotional

- Typically positive bus experiences were rational factors and negative ones, emotional. This underlines the ability of the buses to provide a basic reliable, and convenient service, but one that currently provides few if any emotional benefits. Communication is an area straddling emotional and rational, which in many cases is found insufficient.





Building a relationship with passengers starts with getting rational factors right (trust) and becomes exceptional (feeling valued) when more emotional 'relationship' factors come into play



Practical factors can be very impactful in creating a sense of loyalty and closeness with a bus company – it does what it says it will do, for a reasonable price, and sorts it out if it fails. However, it is the more emotionally engaging factors that build real affinity.



Rational factors build the basis of trust in a service

Consistent, reliable & predictable: basic trust

- At the most basic level, trust is based on doing what you say will do.
 - Without this as a cornerstone, it is hard to see the provider as remotely credible.
- Even when this is not possible, passengers achieve a sense of security when there is a discernible pattern to how services run.
 - A regular stop for a change of driver for example, is accepted to a degree once it is understood that this is a routine.
 - It is a source of frustration that these seemingly unexplained things happen without any forewarning or explanation, however.
- Poor reliability translates into a sense of wasted time – many commuters report that as their bus arrives at such varied points between the advertised times they feel 'forced' to be at the stop much earlier than they may need to be.
 - And can either arrive at work extremely early and have time to kill, or end up being only just on time – a core advantage of the bus – the convenience – is eroded by unpredictable service.
- Trust is measured, in part, by the understanding that large 'events' aside, they can rely on the service, and those who cannot, have less trust.

"My local bus service is quite unreliable, sometimes I have no way of telling when the next bus will be and its stressful for me if I need to get to work."

18-30, commuter, less frequent

"It was fine, not too busy, but it was also frustrating as well as I had to wait for 15 minutes while they swapped the drivers with very little communication given about what was occurring."

50+, leisure, less frequent

"You just get there and immediately you see a massive queue at the bus stop and no indication of when the next bus is. I really don't enjoy that bit."

50+, commuter, less frequent

"The bus can basically arrive at any point, the timetable is irrelevant in the mornings. So I have to get up and get down there about 20 minutes before I really need to as I can't be late for work."

18-30, commuter, frequent



Value for money is another cornerstone in terms of trust

Good value for money

- Perceived value for money is fundamental in feeling a relationship with the provider.
 - Faults can be forgiven if the cost is reasonable.
 - The sense of a provider 'ripping you off' means trust, and the development of any relationship is untenable.
- For most, buses are perceived to be affordable and offer value – they are priced at a level accessible to all and much is forgiven as a result of this.
 - Multi-operator tickets are powerful in terms of helping people to appreciate value for money, but they are not always aware of the alternative, and that in some areas this is not possible.
- Those who have researched alternatives, and made direct comparisons in terms of costs, are more likely to appreciate the value for money offered by buses (particularly anyone comparing driving/taxi or train).
 - Encouraging people to make these comparisons will enhance their appreciation of value.

"I tend to use it a couple of times a week and I just think that £1.90 is quite good value, it just feels like change to me."

18-30, commuter, less frequent

"I use the bus maybe twice a month, basically it's for shopping and the reason for using it is because getting parked with a car is expensive and it's easier to use a bus."

50+, leisure, less frequent

"You can buy a weekly ticket or a day ticket, but you can only go on certain companies. There's that many different bus companies in Sheffield, why can't you just buy one ticket that will get you from A to B on any bus available."

30-50, less frequent

Problem resolution, or even a sense of how that could be achieved, is also an important foundation in trust



Effective problem resolution

- There is a sense of mystery around the buses and in case of queries or issues, many were uncertain who they should complain to:
 - regular users likely to believe that complaints should be upheld with the specific bus company
 - less regular users sometimes went to the Local Authority or Transport Executive.
- There is a general belief that complaints go unresolved or 'fobbed off'.
 - Sometimes benchmarked against the train service where there is a known path (and standards in terms of level of delay and even paperwork pro-actively passed out on very delayed services) for receiving compensation.
- This leads to a real sense of disempowerment – and with the feeling that no one is there behind the scenes, and there is no organising force or boss to whom each strand is answerable, comes a breakdown in trust.
 - This applies whether or not there is a serious problem – it can be as simple as wondering about a change in route or where a bus is that seems delayed – and becoming aware that there is no advertised helpline, email address, and for some, even the operator's name can be only vaguely recalled (more the case with less frequent users).

"There were loads of noisy and drunk people, it wasn't the drivers fault as such but there wasn't anything being done to quieten them or not let them on. It was irritating and the ambience was ruined..."

18-30, commuter, frequent

"I did actually make a complaint because it got to the point where the bus was delayed more and more every day. The reply I got was ridiculous, they just said it was a one-off and not resolved - but that isn't the case – the whole point of writing and what I said is that it wasn't the case – they didn't even read it. I wouldn't bother again."

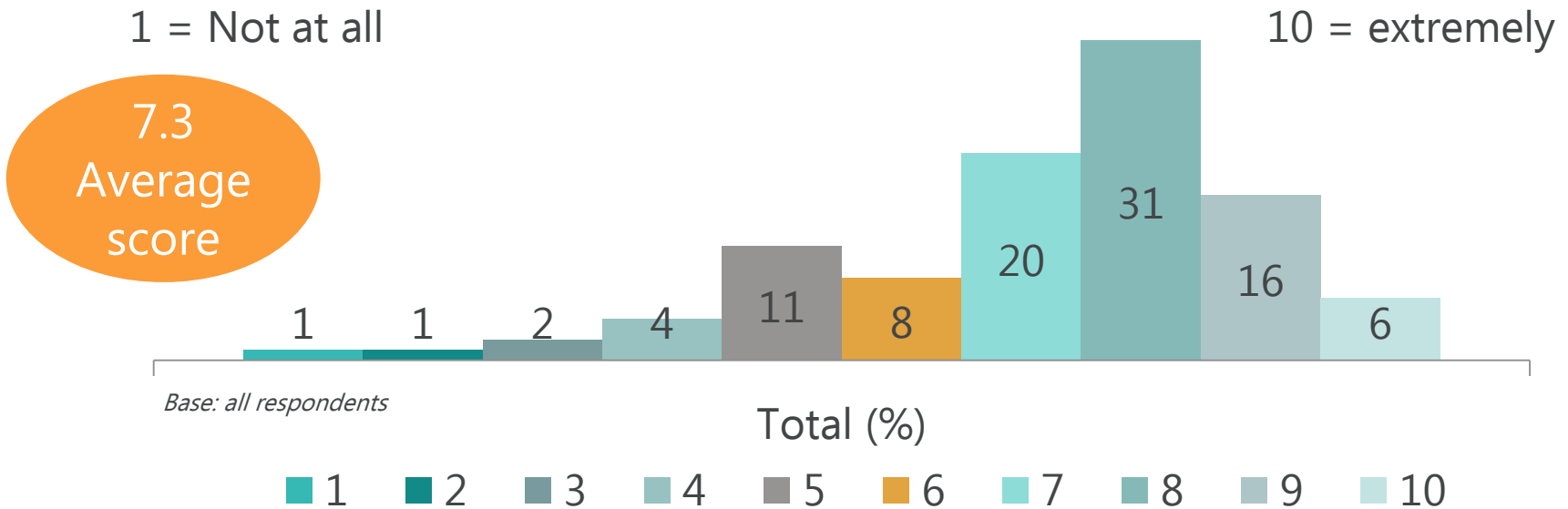
18-30, commuter, frequent



Trust scores were generally high: most reported they were given in the context of value against overall reliability

- For many, a high level of trust in bus service providers is why they use them, and they claim that if value vs, reliability fell short to any greater extent, they might re-visit alternatives.
- Many had not encountered issues which they would like to elevate, so this more poorly-performing area did not impact.

On a scale of 1 to 10, where 1 is not at all and 10 is extremely, how much do you trust the bus operator that you use most often?



- Commuters placed the highest level of trust in their service providers (average of 7.4), yet frequent leisure users and even non-users gave reasonable scores (both average of 6.5).
- At this basic level of the relationship performance is reasonable.

Moving towards a deeper sense of being valued – basic emotional factors



Moving from trust/satisfaction, to a higher level in the relationship - a sense of being valued – lies partly with drivers

- At an overall level, as well as on a journey by journey basis, rational factors account for trust and basic satisfaction. A 'good' journey is one where the basic rational factors go well, and there were few (if any) negative emotional factors interplaying:
 - the bus arrived at the time expected/stated
 - people were able to get straight on the bus
 - it was easy to pay and ticket price was as expected (or at least reasonable)
 - the bus driver greeted them in a personable way
 - the bus was fairly quiet and hassle free
 - the bus arrived at its destination in good time.
- Even with all these rational factors met, passengers were unlikely to feel they had relationship with their local bus service, but a few frequent bus users translated having a regular bus driver who they 'knew' to a sense of relationship with the bus brand. The bus driver was generally held to be the conduit to any form of relationship with the bus company – being the only 'face' or even touch-point most had.
 - Unsurprisingly, less frequent bus users are particularly unlikely to have a relationship at all with their local bus service, but again a greeting, a smile, or some sense of personality from the driver brought them closer to the brand.
- However, 'magic moments': occasions recalled which really impressed people and made them feel valued, were frequently focused on more emotional experiences: usually to do with staff excellence (overridingly, the driver) and experiences where they have gone 'above and beyond' to be personable and helpful. Examples of this kind of behaviour included:
 - proactively informing passengers of any delays or problems on the route and advising of alternative transport options
 - wearing a festive hat and making an effort to keep passengers happy on their Christmas Holidays
 - handing back items left on the bus from the day before (regular user)
 - helping people onto the buses (i.e. mothers with pushchairs, elderly people, disabled people).

Staff excellence lies at the heart of building a relationship, raising the 'rational basics' to something meaningful



Staff excellence, going the extra mile

- People understand relationships in terms of personal contact. Perceptions of drivers in terms of friendliness, professionalism and helpfulness, and how valued passengers feel are strongly linked:
 - Human connection with a driver translates into concept of a company who see passengers as more than 'just a number'
 - Many quick to say that a cheerful driver must be well-treated by employers.
- 'Going the extra mile', as passengers term it, and the sense of value that comes from human contact, is the key emotional factor around which the other middle tier factors sit
 - The driver can portray '**visible choice**' in terms of suggesting alternate routes or transport in case of delays or problems, but more importantly is a key embodiment of **honestly and transparency**.
- There was also a feeling, especially amongst older bus users, that relationships and engagement with bus services have become much harder to discern than in the past. This was driven by:
 - difficulty in contacting all service providers in general, seen as a 'modern problem' and driven by branch closures and online/telephone services
 - the loss of bus conductors from buses, so only one staff member is present
 - a perceived high turnover / increased volume of bus drivers, driving down the likelihood of a regular contact.
- This makes it all the more important in terms of relationship building, that the staff that are there, demonstrate their humanity – at minimum acknowledging passengers as they board the bus and offering help where clearly needed.
 - And ideally offering more in terms of pro-activity, friendliness, and care to really build this sense of value and relationship.

Going the extra mile creates a clear sense of value and builds relationships



Catherine is a regular commuter in the Bristol area. She occasionally uses the bus at the weekends for leisure purposes; usually to take her five year old son into the city centre. She experienced a 'magic' moment whilst she was waiting for a bus at the weekend to take her into the city. The bus driver could see she was on the wrong side of the road and waited for her to cross and get onto the bus before he pulled away.

Catherine was waiting patiently with her son for the bus to arrive. She could either take this route or a route in the opposite direction, but was unsure which bus service would arrive first as she only occasionally uses the bus for this purpose, so had to decide on one route to wait for.

Catherine saw that the bus service for the route in the opposite direction had arrived first, which has a bus stop on the opposite side of the road.

She could see that there were no passengers at the bus stop waiting to board, and thought that the length of time the bus would wait there would be short, so decided to run in order to get there before the bus driver pulled away.

The bus driver could see that she had crossed the road and was running to board his bus and so waited for her to board before pulling away, even though he had no other bus passengers to board. He also allowed her time to get her change to pay for the bus, and was very polite and friendly towards her, whilst acknowledging she had to run for the bus.

Comments from bus users illustrate just how central the experience of the bus driver's attitude and behaviour is to feelings of being valued



POSITIVE EXPERIENCES

"It was pouring down with rain and I just got off the bus when I realised that I'd left my brolly on so I turned round to the driver, who had just pulled away and shouted, "My brolly," and she stopped and she let me get back on. I just thought that was really nice."

50+, leisure, less frequent

"The journey was great, the bus was on time and the driver was happy and friendly."

18-30, commuter, frequent

"The bus driver got out of his cabin and helped the disabled passenger into the bus, personally ensuring that they had enough space and were comfortable. I just thought that was great! It really cheered me up and restored my faith in humanity."

30-50, commuter, frequent

"The service was excellent, the bus was on time, clean and comfortable. The driver was very courteous and friendly"

50+, commuter, frequent

"The driver was quick in dealing with passengers, which was considerate as it was raining and he made sure we all got out of the rain quickly."

18-30, commuter, frequent

"On a few occasions when I haven't quite got the right change and the bus driver just tells me not to worry about and go and sit down. I just think that's really nice of them."

50+, less frequent

Negative experiences with drivers has the opposite effect and can destroy trust, even if exceptional



NEGATIVE EXPERIENCES

"I've been on the bus before where it's the driver, like it's their attitude that can make a complete difference."

30-50, commuter, frequent

"I still think the service nowadays is pretty poor, but I think attitude, you know, "How do I know?" if you ask a question."

30-50, occasional / non user

"The bus was packed and everyone was hot and sweaty and there was no indication from the driver as to why the bus had stopped."

30-50, leisure, less frequent

"The company is trying to do the best they can, unfortunately you can't drive that into the bus driver himself."

30-50, commuter, frequent

"When the bus reached town it filled up with pupils. The bus became rammed with people on the stairs and the driver wasn't making any movement to help at all."

50+, commuter, frequent

"The driver hit someone with his wing mirror knocking them down and just drove on without saying anything. I just couldn't understand that."

50+, commuter, less frequent

"Sometimes the drivers are really helpful but other times, they can just be so rude and I think, that can put people off."

30-50, commuter, frequent

"They've got an issue with change if you haven't got the right change or you've got a big note and they've got to change it up, it's like oh! It's a hassle."

30-50, commuter, frequent

"It was 10 minutes late and didn't say sorry or even acknowledge that the bus was late."

50+, leisure, frequent



Honesty, and transparent communication is important, even down to the level of who the provider is and their role

Honesty and transparency: enhanced trust

- The higher level of trust is gained through perceptions of honesty and transparency – a company that does its best to communicate and even if it can't provide all the answers, gives the information available
- A layer beneath this, understanding of the contractual set-up behind bus provision, who the stakeholders are and their individual roles and responsibilities, is vague and limited.
 - Some mentioned franchise arrangements and the notion of bidding to operate a route, but many had no idea at all how a company would come to run a service or who it had to answer to, if anyone.
- There is a lack of awareness about who has overall responsibility for local bus services:
 - some talked about a regional passenger transport executive, but this varied by region
 - Transport for Greater Manchester reasonably well known in Manchester, although many got the name wrong and struggled to describe the role
 - limited understanding of the local authority role, if any – however there was a feeling that the local authority played a bigger part in some areas than others i.e. Reading.
- Little thirst for information on how services are run, and knowledge of who runs the service is considered unimportant in comparison to factors such as consistency, reliability, and security, at a 'top of mind' level. But, the lack of knowledge makes the bus company's identity indistinct and communication with them – especially, as we have seen, when problems need to be resolved – difficult. They don't know who it is they are or are not valued by!
- Understanding more about the challenges and demands on the bus companies tends to make passengers warmer towards the company – transparency is powerful.
 - Manchester groups did not realise bus companies had to fund security themselves – finding this out added a sense of value and a sort of sympathy for the provider.



Linked to unclear perceptions around the structure of bus provision, perceived lack of choice can obstruct relationship building

Visible choice

- Lack of choice in terms of bus service leads to resentment and for some to feel more like a captive audience than valued customer. The more choice a passenger feels they have in terms of overall mode of transport generally makes them happier with their eventual selection – they have reasons for rejecting alternatives. The same applies in terms of route / provider – those able to choose are happier.
- Many felt that they had a greater relationship with supermarkets, mobile providers, technology companies, car brands and banks than with the local bus service.
 - Mainly driven by choice, with the majority of people feeling they have chosen to use the above services, but feeling unable to exercise choice at all in terms of bus operator – there is only one.
- People tend to see buses as a 'public service', and the idea of them having a brand or being open to engagement feels alien in many ways – why would a bus operator want this as they run the service whether passengers are happy or not? Limited understanding of the role of the local authority feeds into this lack of clarity and sense of any control in terms of ability to select provider.
- Providing a sense of choice, even in small ways, will help people feel more satisfied in their bus relationship.
 - This can be as simple as suggesting alternate routes or getting off a stop earlier if traffic is known to be bad – bus drivers can assist in giving passengers the sense of choice.



Those who have 'chosen' to use the bus over an alternative are generally more satisfied with bus travel

- Degree of choice can impact on satisfaction in different ways



Achieving an outstanding
relationship: higher
emotional factors

Current performance on feeling valued is lower than for trust, as it is a higher level feature



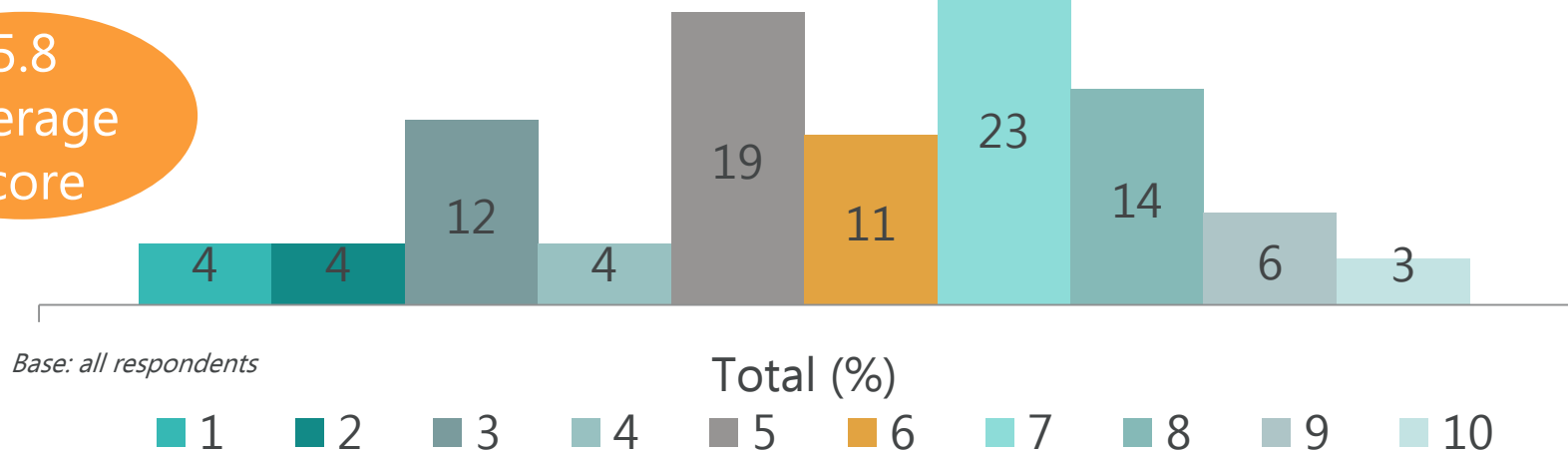
- Scores cluster around five – seven – middle of the road. For most, feeling valued is something which is proven over time, and derailed by occasional bad experiences. Consistency of service is crucial in achieving better scores for feeling valued, as is better communication on an ongoing basis (keeping people updated) and a way for them to feedback, ask questions, and complain.

On a scale of 1 to 10, where 1 is not at all and 10 is extremely, how much do you feel the bus operator that you use most often cares about you as a passenger/customer?

1 = not at all

10 = extremely

5.8
Average
score



- Less frequent and non-users feel the least valued (average of 4.9), which may be part of the reason they don't use services (more often). Frequent leisure users feel the greatest level of value (average of 6.2), probably due to using less busy services (off-peak) and being under less time pressure than commuters.



The idea of having a 'relationship' with the bus provider and being valued by them are closely linked

- Those who had any sense of relationship with the operator were most likely to perceive that they are valued by them. In semantic terms this frequently translates into a difference between being a 'customer' and a 'passenger' – a customer is someone who pays for a product and service and is valued as a result. They are offered 'customer service', partly as recognition of the economic relationship between their continued choice to patronise the supplier and that supplier's continued existence.
- The majority of bus users did not feel that they were treated as customers by the bus service, seeing no evidence of 'service' or even basic communication of any changes, delays etc. in many cases.
- Perceptions of the position of the bus service in terms of business type does not help:
 - many see it as offering a pseudo public service position – with little or no choice and a 'public service' wrapper of buses leads people to feel the buses are almost like a local authority / public provision
 - at the same time, there is an underlying awareness that they are private, money-making companies.
- This has the effect of offering the worst of both worlds, with it viewed as:
 - negative association for public services in regard to over-regulation/inflexibility/being behind the times and over-stretched
 - 'money-grabbing' profit motivations of the private sector (don't care for the passenger/'just a number').
- **Communication** is the tool that can straddle this awkward space and help passengers to understand what the bus companies are (and aren't) to allow realistic expectations to be set and establish a sense of relationship beyond that with an individual driver.
 - Even using the language of a 'customer' could help to establish a sense of value and dependence.

Feeling valued as an individual will usually stem from communication and an invitation to receive feedback in return



Feeling valued as an individual customer

- Feeling valued most often comes from a combination of other factors – being communicated with in an honest and clear fashion, friendly and human service to the individual and others, and knowing who to approach (and being listened to and acknowledged when that is approach is made) in case of problems.
- Clear pathways to make enquiries, suggestions, and complain are therefore essential in terms of feeling valued, as is the belief that a response will be forthcoming.
- Consistency across touch points is extremely important in building this overall sense of being important to the company, and just one poor experience can impact greatly on an overall perception of being valued.
- Communication lies firmly beneath this sense – as the understanding that the company is sharing information, and potentially even consulting the user as to any changes under consideration or establishing their priorities strongly suggests that the passenger (and their experiences and opinions) are important.

"You're just a number, they don't care what you think or if you're OK. The driver sees my disabled pass and then speeds away without even checking I've got to my seat. I've fallen over before now, and I don't even know who I would complain to about that. And drivers don't even have a number or anything to identify them even if I could!

50+, frequent, leisure user, disabled

Achieving an outstanding relationship: higher emotional factors



Feeling in control

- A sense of control is the ultimate expression of a successful relationship with a bus company.
- Security was mentioned disproportionately to the degree to which any incident had been experienced, but it suggests the sense of vulnerability putting oneself into someone else's hands can bring:
 - this covers how safe they feel with other passengers
 - how likely they feel the bus driver will be able to provide them with a sense of security
 - how much they feel they can trust the service overall (to do what it says it is going to do) is tightly correlated with this perception of retaining some control, even if as a passenger.
- Communication can begin to engender the sensation of control – when fares or routes change, delays occur and things go wrong, being forewarned or clear on where to bring any complaint helps this need to be met
 - At the moment many have no sense that there is a system, a procedure, or even an ecosystem linking the individual buses together – the set-up seems uncontrolled and this leads to them as users feeling vulnerable and in turn very conscious that as passengers they are out of control.

"Sometimes its just as simple as waiting at the bus stop and there being a clear notification saying that the next bus is going to be 2 minutes and it arrives 2 minutes later."

Less frequent, commuter

"It typically goes through town and picks up a load of school kids and sometimes you can't even get off the bus because there's that many and they're sat up the stairs and the drivers not saying anything."

30-50, commuter, frequent

"With the safety...its just that you don't know what's going to happen next, who's going to get on and if they've been drinking or taking drugs or whatever it is, and you have no sense whatsoever that anyone would do anything about it.. Before this I didn't even know they have CCTV on the buses."

50+, less frequent, leisure



Information and communication permit a feeling in control

George is retired, and uses the bus around four times a week to access Maidstone town centre. He would like to be able to use real time service information, available either through a phone number or at the bus stop. A journey he tried to make on a weekday afternoon, for which the bus service failed to ever arrive, brought this need to his attention. This was later found out to be due to gridlocked traffic in the surrounding area, causing severe delays.

George waited for his usual bus from Maidstone town centre to his home on the outskirts of town.

He then asked a bus driver on another bus route if they had any information but they were unable to help.

He crossed the road and asked passengers at the opposite bus stop, and even looked on their timetable boards but still could not find any source of further information.

George eventually walked 20 minutes across town to get a different bus service home. He later found out his usual bus route was suffering severe delays. If he could have found that out there and then, he would have taken the second choice route immediately, saving him time.





Barriers to bus use for non-users

Non-users are far more likely to associate bus travel as being the least desirable mode of transport.

- They only use bus transport when all other modes of transport choices are not available.
- They associate bus use with not being in a professional job or being in a stage in their life whereby bus use is an unfortunate necessity due to lack of funds for a private car.
- Even amongst younger non-users who do not have access to private cars, many still avoid bus use as much as possible, only choosing to use it when all other modes of transport are unavailable.

In line with users, non-users also have negative associations driven by emotional reactions to the following:

- ✗ The physical environment of the bus
- ✗ Perceptions of fellow passengers
- ✗ The behaviour of the bus driver.

"Its all the strange people that you end up setting next to or the smelly people..."
30-50, Occasional/non user

"I still think the bus drivers provide a pretty poor service. Their attitude is very much "How do I know?" if you ask a question."
30-50, Occasional/non user

"The driver couldn't control the crowd it was really stressful and it was so jam packed that I couldn't get off. And then I looked at other buses and it was clear it was happening on all of them."
Occasional/non user

However, this group also has a stronger sense of 'vulnerability' attached to bus travel. This sense of vulnerability is driven by the following factors:

- ✗ reliability of the bus driver to control things
- ✗ an overall lack of comfort and ease with the physical environment .

Barriers to bus use for non-users (continued)

In order to understand the heightened negative association with bus use amongst non-users it is important to highlight that very few see any of the rational benefits also associated with bus use.

With users, the stigma of bus use is counterbalanced by the rational factors of convenience and value. These rational benefits are not considered relevant as the majority of non-users drive and see their private car as providing all these positive rational factors alongside emotional factors such as: a greater feeling of comfort, autonomy and control.

"I can get to work in my car in 10 minutes rather than taking two buses, or one bus and a tram journey. There isn't a direct bus service where I live."

Occasional/non user

"Well, you used to be able to buy a return ticket, they don't do that anymore, you've got to buy a Dayrider or Weeklyrider...so I just think it's expensive."

Occasional/non user

Without any positive rational benefits accounted for, non users have a primary focus on the negative emotional factors which are universal to bus use amongst all passengers.

Many non-users also have no understanding of the local bus service at all, caused by:

- infrequency of use
- poor communication provided by the bus service

A lack of awareness of the bus service increases feelings of vulnerability amongst this particular group of passengers. With little or no understanding of the bus service, what it stands for and what it offers, non users have little trust in the bus service to provide them with a positive customer experience.

All these factors combined mean non-users are far less likely than users to feel in control over their bus journey or to feel valued as a customer.

Reactions to the 2010 scores



Priority areas identified were wide reaching and covered rational factors in great detail, less so the emotional

- Bus users felt that the priorities for improvement identified in the 2010 study were broadly relevant and comprehensive and there weren't any duplications. Many differences in response/importance given are partly down to the perceived service level in other words if something isn't a problem, it doesn't need to be prioritised for improvement.
- The bus user population is diverse and many of the priorities only impact a minority (those travelling with young children and the disabled/elderly in particular) – despite this, everyone considers they should be included in the survey. A strength of buses is their accessibility to all, and people are keen to see this reflected in the standards the industry is measured against.
- What may be lacking are statements around the emotional side of the bus experience, which, as has been seen, are extremely important in making people feel valued and confident in using the bus.
 - Higher relationship factors very much come out of these more emotional elements.
- It may be worth repositioning some of the statements around a more personal, emotional, sense-based reaction to bring this out, for example:
 - I feel safe when waiting for the bus
 - I feel safe when travelling on the bus
 - I feel acknowledged by the driver
 - I feel the environment of the bus is clean and hygienic.
- This should serve to remind passengers of their reactions and feelings to the journeys they make, as well as encourage them to evaluate the overall importance of the area in terms of being prioritised.



Statements that draw out the issue of consistency may need to be added to the priority list

- One key area the existing list of priorities does not bring out sufficiently is **consistent service**. The research has highlighted that inconsistent service received across different drivers and services is particularly damaging and in need of improvement.
- Existing priorities that touch upon consistent service include: '*All bus drivers are helpful and have a positive attitude*', '*All bus drivers are smartly dressed and have a professional appearance*'. However more focus needs to be on the **overall customer service** provided by bus companies.
- Consistency across both the rational and emotional factors identified ensures that the customer always feels that the bus service has its interests at heart. This can be through information at the bus stops as well as the experience once a bus passenger gets on the bus. Help and advice should also be readily available as part of the on-board journey experience and provided not only by the driver but also by access to customer service helplines which are clearly advertised on-board.
- Inconsistent service moves the bus user away from the sense of being the customer of a large coherent customer friendly organisation with which it would be viable to have a relationship with, to merely a passenger on a series of individual routes operating to their own rules and whims (a perception they are likely to slip into already).
- A simple, global statement to add might be:
 - Local bus services have a consistent overall standard and you always know what to expect.

"If all the little factors are joined together i.e. it arrives on time, its comfortable, the temperature is good..."

Younger, commuter, less frequent



Highest priority features – top ten of the 2010 statements

- = Commuter top priority
- = Leisure/frequent top priority
- = Occasional/non-user top priority
- = 18-30 age group high priority
- = 50+ age group top priority
- = 30-50 age group high priority

More buses are on time or within five minutes of when they are scheduled to arrive

The correct route number and destination is clearly displayed on the outside of all buses

Accurate timetable and route information is available at all bus stops

Personal security onboard the bus is improved through the use of CCTV cameras on all buses

Bus fares, tickets and passes offer better value for money

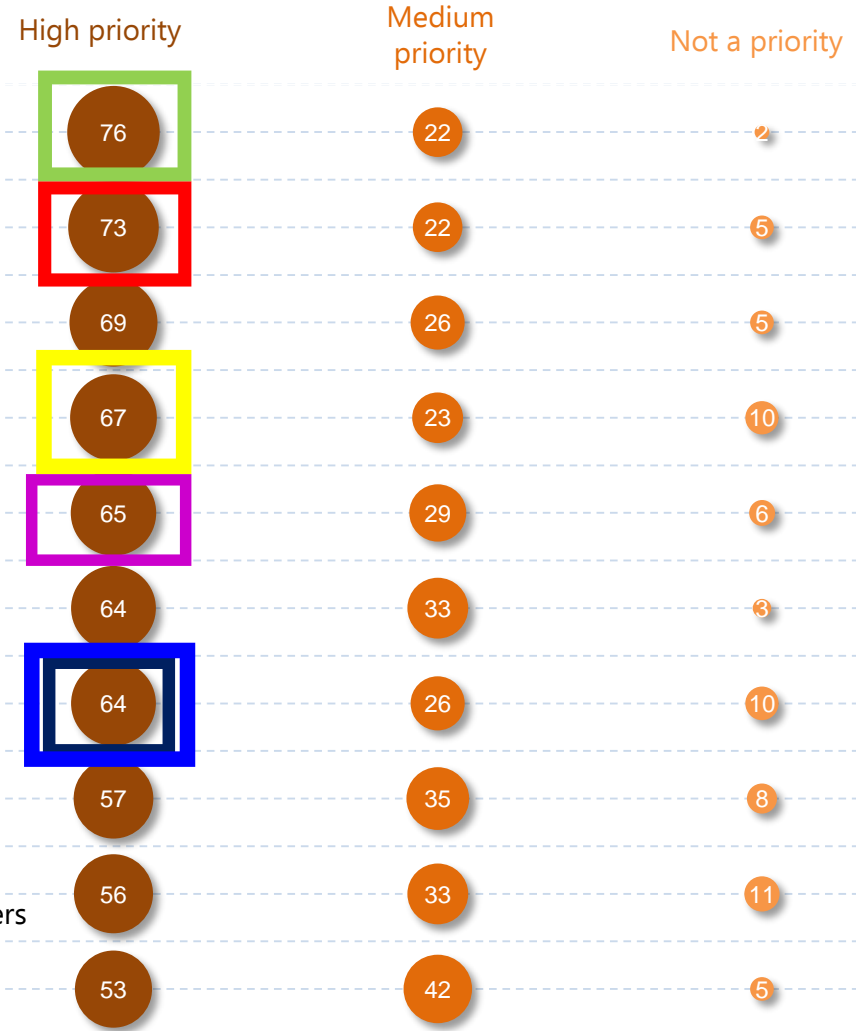
Buses run more frequently at times when you want to use the bus

All bus drivers are helpful and have a positive attitude

The inside of the bus is clean and litter-free at all times of the day

All buses have sufficient room for wheelchair users and people with a buggy or pushchair to travel in comfort without obstructing other passengers

Electronic displays showing the correct length of time until the next bus



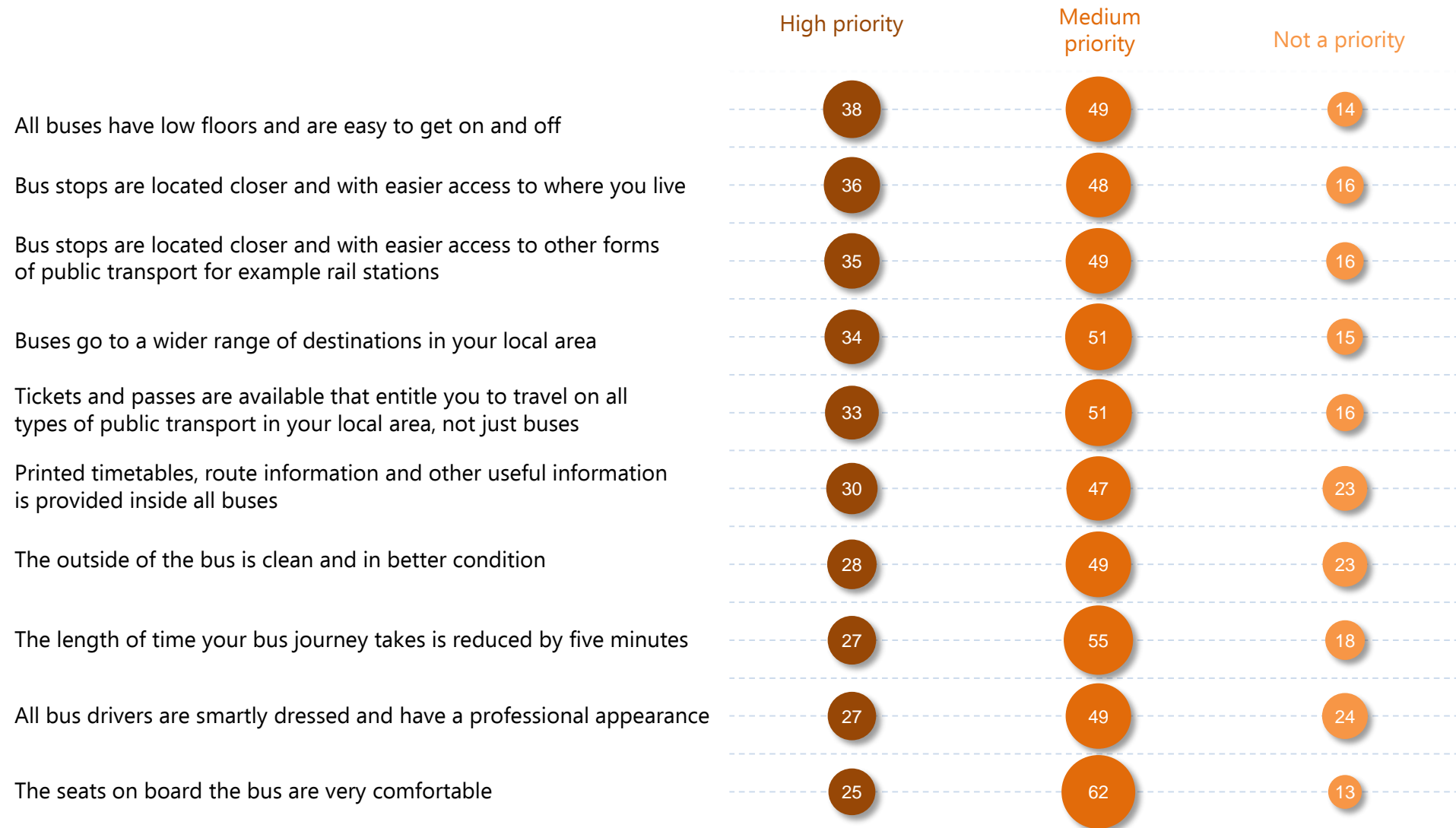


Medium priority features – middle 10 of 2010 statements

	High priority	Medium priority	Not a priority
The temperature inside the bus is regulated at all times of the year to ensure it is neither too hot nor too cold	50	41	9
Personal security while waiting for the bus is improved through the use of CCTV cameras at all bus stops	47	36	17
Tickets and passes are available that entitle you to travel on all bus services in your local area, not just those operated by a specific bus company	46	44	10
The name of the next bus stop is announced or displayed electronically on the bus during the journey	45	40	15
All passengers are able to get a seat on the bus for the duration of their journey	43	46	11
All bus stops have a well-maintained shelter	43	38	19
All buses drive at an appropriate speed and are free from jolting	42	43	15
All bus stops are clean and free from graffiti	40	44	16
Bus tickets, travelcards and passes can be purchased more easily and from a wider range of sources	39	49	13
Information on fares is available at all bus stops	39	44	17



Lower or of niche priority of the 2010 statements





Additions and improvements needed for the forthcoming survey

- The research also highlighted areas that need to be 'dialled up' in the existing statements. More responsible driver behaviour and the provision of apps/live feed data for real time travel information were mentioned by many bus users across groups and would represent a mixture of rational and emotional reassurance
- Frequent users are far more likely to highlight rational areas for improvement (ticketing, practical travel communication), while less frequent users are more likely to highlight more emotional areas for improvement (aspects of their environment). This suggests frequent bus users are less affected by factors that don't immediately impinge on the basic level of service provided by buses while less frequent users are more sensitive to more 'peripheral' factors.

Audience	Additions
All audiences	<ul style="list-style-type: none">✓ More responsible driver behaviour, especially in relation to allowing enough time for people to sit down (this can be integrated into the statement 'All bus drivers are helpful and have a positive attitude')✓ The provision of Apps or other internet based devices that allow for real time tracking (this can be integrated into the statement 'Accurate timetable and route information is available at all bus stops')
Frequent users	<ul style="list-style-type: none">✓ The use of smart ticketing through 'Oyster like cards' and contactless payment that can be topped up through a variety of sources and used on all bus routes and companies (this can be integrated into two statements 'Bus tickets, travel cards and passes can be purchased more easily and from a wider range of sources' and 'Tickets and passes are available that entitle you to travel on all bus services in your local area, not just those operated by a specific bus company')✓ Clearer on-board communication given to passengers about reasons for any extensions to journey time especially during peak hours i.e. early/late timings on routes, change of drivers, mechanical problems etc. (this can be integrated into the statement 'All bus drivers are helpful and have a positive attitude.')
Less frequent users	<ul style="list-style-type: none">✓ Rubbish bins on buses (this can be integrated into the statement 'The inside of the bus is clean and litter-free at all times of the day')✓ Improving ventilation and hygiene (this can be integrated into the statement 'The inside of the bus is clean and litter-free at all times of the day')

Final thoughts and next steps



Final thoughts and recommendations

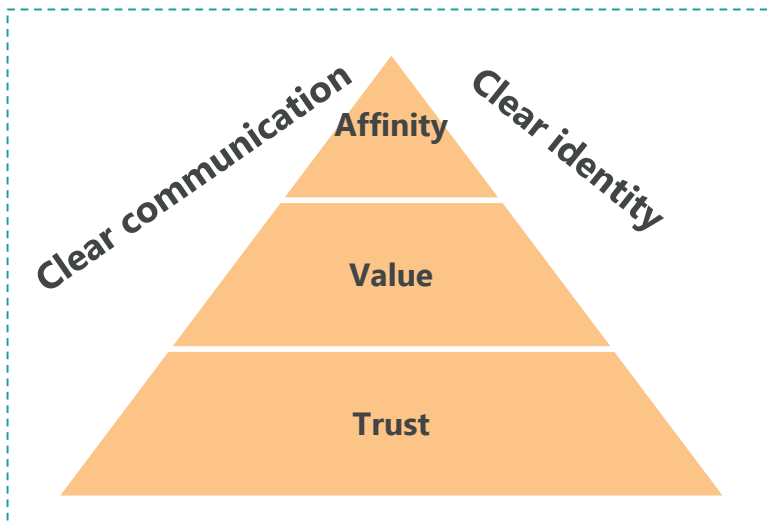
Overview of bus usage and perceptions

- Bus travel is very much seen to offer a basic local transport service to users. Usage for all groups and locations is very much dependent on convenience due to the large bus network rather than any real preference.
- Typically regular users tend to see the bus as offering a vital local service which gets them around their region for necessary journeys and fulfils many of their day-to-day travel needs. Regular bus users are more likely to highlight the positive functional factors of bus journeys such as being 'relatively hassle free' and 'good value'. And though many do associate bus use with some negative and more emotional associations such, as anti social passengers and rude bus drivers, these factors are seen as peripheral and largely ignored.
- Less regular bus users on the other hand are typically far more focused on the negative associations with bus use. This is mainly driven by emotional reactions to the bus driver, bus environment and their fellow passengers, and are far less likely to be positive about the functional benefits such as value, convenience and accessibility.
- One key aspect impinges on perceptions of both groups of users – **inconsistency** – which is found in customer service and quality of communication. This is seen as a key area that requires improvement by the bus drivers and the company in general. Many users do not feel confident in the consistency of service and the quality of communications they receive on the bus services they use.
- The effects of this are wide reaching – by destabilising the notion of trust in the bus service, they stop long term users from feeling fully valued as customers and further lower expectations and reinforce the negative associations of infrequent users.

Final thoughts and recommendations

Relationship with the bus service

- The vast majority of bus users do not have any affinity or engagement with their local bus service, and feel like passengers rather than customers.
- When looking at how to build affinity and engagement between bus users and their local service, trust and value play a key part. A successful relationship with any organisation/service must contain these core factors, in addition to having clear communication which drives both trust and value and enables the formation of identity and transparency of the organisation/service.



Trust in the bus service is quite high, especially amongst commuters/regular users. The bus service typically delivers on a number of rational factors such as reliability and value.

Feelings of **value** are much lower for bus users, especially amongst occasional users and commuters. This can be partly attributed to the prevalent perceptions of inconsistent service and bus driver attitude and behaviour as well as a lack of real choice.

- Lack of **clear communication** and a **clear identity** of who the bus companies are and what they stand for impact on feelings of trust and value and have a detrimental impact on customer affinity.
- These factors of communication and identity, or the lack of, also impact specifically on day-to-day journeys and the ability for passengers to make complaints or enter into a dialogue with bus companies which in turn removes the possibility for enhanced trust through honesty and transparency.



Key things to shift perceptions of trust and value

- The bus service is currently delivering on many of the basic levels of its service but more **consistency** and **better communication** is needed to drive higher engagement with users.

Improvements required

Areas it impacts on



Delivering a consistent level of customer service

Drivers need to deliver a basic level of customer service that builds a personal contact with the user however minimal or fleeting it may be. Bus companies must be made aware that as company representatives, polite acknowledgements and helpful advice from bus drivers, carried out within an understanding of time pressures – go a long way to building affinity between the user and the bus service.

Good value for money

Staff excellence, going the extra mile



Providing a consistent quality of communication

Clear communication drives engagement and builds trust with the service. Users desire far more clarity around everything to do with the running of the bus service. Communication is especially needed around the key functional areas of the service such as expected arrivals and departures at bus stops and on-board information on fares, expected journey times and reasons for delays.

Consistent, reliable & predictable: basic trust

Honesty and transparency: enhanced trust



Promoting understanding and identity

Linked with clear communication, provision must be made for a clearer understanding of who the bus companies are. The easiest way for this would be to ensure that customer service helplines are provided for users on-board buses. This helps to improve transparency and encourages relationship building through problem resolution. A clearer identity also promotes choice for users in the bus companies they use.

Effective problem resolution

Visible choice

APPENDIX



The role of buses in everyday travel needs – typical reasons and travel patterns by frequency of use

For most frequent users, the bus is the primary mode of transport and they typically use it at least 3 or 4 times a week mainly for work.

On many occasions this will be alongside other modes of transport i.e. they get the bus to a tram or train station, or they choose to walk back from work. At the same time, the bus journey is a regular and prominent feature of their travel.

For slightly less frequent users, the bus is used once or twice a week as a secondary alternative for commuting to work or for primary weekly/bi weekly trips to university/college. It is used as a secondary transport alternative for people who want to save themselves money a couple of times a week, i.e. from town centre car parks.






It is also used for regular weekly or bi-weekly leisure/shopping trips into town for daily shopping or social events where a bus trip into the town/city centre is the most direct and convenient mode of transport available.

For infrequent users, the bus is used mainly for social events in the town/city centre at night, which typically occur 2/3 times a month. It is also used for monthly or bi monthly daily leisure trips to places that are best served by the bus network (e.g. friends/family in different suburbs or sports/music events).

Infrequent users typically use services into the town centre when they know that alcohol will be consumed and they won't be able to use a car. However in this instance, the majority would prefer getting a taxi back home after a night out as they feel it offers more comfort and ease of use than any night bus available.



Bus use varies by person, but the following are typical of the experiences and expectations of each user type

	Frequent Users	Infrequent Users
	<ul style="list-style-type: none">• Choice driven by availability and convenience• Little or no differentiation between bus companies• Low awareness of other operators	<ul style="list-style-type: none">• No differentiation between the bus companies• Other modes of transport favoured• Bus only taken as last resort
	<ul style="list-style-type: none">• Most do not plan / pre-buy tickets online• Know bus times and allow plenty of time for 'their' bus to appear• As long as a service is available within 5-10 minutes of arrival most are satisfied	<ul style="list-style-type: none">• Majority only have a very vague idea of bus services• More likely to get frustrated waiting for longer at bus stops• None of this group choose pre-buy tickets as bus usage is irregular
	<ul style="list-style-type: none">• Typically journeys taken as solo or connecting journeys with other buses• When part of a multi modal journey there is heightened anxiety around timing	<ul style="list-style-type: none">• Typically journeys are taken in isolation to locations other preferred modes of transport can't access
	<ul style="list-style-type: none">• Regular users tend to buy weekly/monthly pass from the driver• Purchasing is generally felt to be easy given how routine it is	<ul style="list-style-type: none">• Typically pay for fares on a per journey basis• A lack of knowledge around ticketing which tends to impact negatively on perceptions of value and convenience
	<ul style="list-style-type: none">• At peak times an acceptance that getting a seat may be difficult• Happy as long as there are no unscheduled detours or delays• Accepted that journey duration may vary	<ul style="list-style-type: none">• This group experience all types of passenger volumes• More of a negative emotional reaction to crowds and discomfort caused by a lack of available seating



Key rational and emotional drivers

- Peoples associations with buses are typically driven by factors that can be described as either 'rational' or 'emotional'.
- The following are typical characteristics that can be assigned with any bus service

Rational characteristics typically include:

A good service that offers good value for money

Delivering consistency and predictability over time

Effective problem resolution when mistakes happen



Emotional characteristics typically include:

Honesty and transparency

Staff excellence in terms of positivity, helpfulness and visibility

Going the extra mile to exceed expectations

Offering a tailored/personalised service that makes customers feel valued on an individual level

A combination of rational and emotional consumer benefits is required to create a truly positive experience and build a positive *customer relationship* between the consumer and the service

Defining magic moments



Magic moments are typically driven by staff interaction or positive outcomes from (anticipated) bad experiences

Good bus journeys

MAGIC MOMENT SCALE

Going above & beyond

Sometimes buses are better than using cars because it's easy, hassle free and I can read a book on the bus."

Middle aged, Commuter, frequent

"Putting Wi-Fi on their services is a great thing and it certainly helps in the morning."

Younger, Commuter, frequent

"[If] no one sits next to you. So you can sit down in the seat and spread your legs a little a bit and get comfortable."

Middle aged, leisure, frequent

Reasons for bus usage vary according to frequency of use, with convenience and affordability keynotes



"Mostly in the mornings if I'm going shopping or I just want to relax really, had enough of driving to work. Haven't got much money so it's probably only about one or twice or three times a month, getting the bus going into town."

Young, leisure, less frequent

"I'm employed as a caretaker/supervisor, I tend to use the bus probably three, maybe four times a week, it gets me into work."

Middle aged, commuter, frequent

"I tend to use the bus about 10 times a week, mainly to work but also when I want to go into the town centre or neighbouring towns."

Middle aged, commuter, frequent

"I don't use the bus very often, usually for leisure, going out, basically. And that's if I'm only going to town, so it's very infrequent, once a month at the most."

Middle aged, occasional / non user

Defining miserable moments

There are a wider range of touch-points that can trigger a miserable moment and many are driven by or made worse by a lack of communication and/or engagement with the bus driver and service.



Bus stops



Bus Drivers

"It makes me anxious, I'm walking to the bus stop and I just see the bus driver go straight past me without stopping and it just fills me with dread."

Older, commuter, less frequent



Bus Environment

"The smell gets to me sometimes, it could be anything from bringing food on the bus or being crushed in with other people who can smell quite bad."

Younger, leisure, less frequent



Bus Passengers

"Somebody who's just talking about boring stuff for an hour of your journey with a loud voice."
Middle age, occasional user



Value and trust slides – taken from diary

Magic moments are typically driven by staff interaction or positive outcomes from (anticipated) bad experiences

"It's bad when you are a couple of feet from the stop, knowing the driver has seen you and then leave you behind."

50+, leisure, less frequent

"I was able to get a seat, the bus was nice and empty and clean! The bus driver was really friendly."

50+, commuter, frequent

"The bus was packed and noisy and very untidy. We had to stop at nearly every stop for people to get on/off which delayed everything."

18-30, commuter, frequent

"The bus was hot and smelly, but on time."

50+, leisure, frequent

"The service was excellent, the bus was on time, clean and comfortable. The driver was very courteous and friendly"

50+, leisure, less frequent