

Smart Ticketing on Buses in Brighton & Hove

Phase 2 research findings

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Background



Background

- Compared to many towns, Brighton has a fairly **advanced smart ticketing** scheme
 - **Their smartcard** (known as the key) has been available on the town's Go-Ahead buses for a number of years and can also be used on the **rail network** for travel on Southern Railways services to London
- However, two of the smaller local bus companies, **Big Lemon** and **Compass**, were **not smart enabled** and only accepted **paper tickets** until August 2015
 - **A source of confusion and even complaint** amongst passengers, and it was suspected the inability to use the main ticketing system in the town dampened **demand and usage** of these services
- The DfT launched a **pilot** on Monday 3rd August in the Brighton area that involved two Big Lemon and seven Compass buses being **smart enabled**
 - Allowing bus passengers to use the key on these buses and remove the **need for separate tickets** when travelling on Go-Ahead services
- This study sets out to evaluate the impact of this pilot and answer some of the important questions about how well objectives have been met

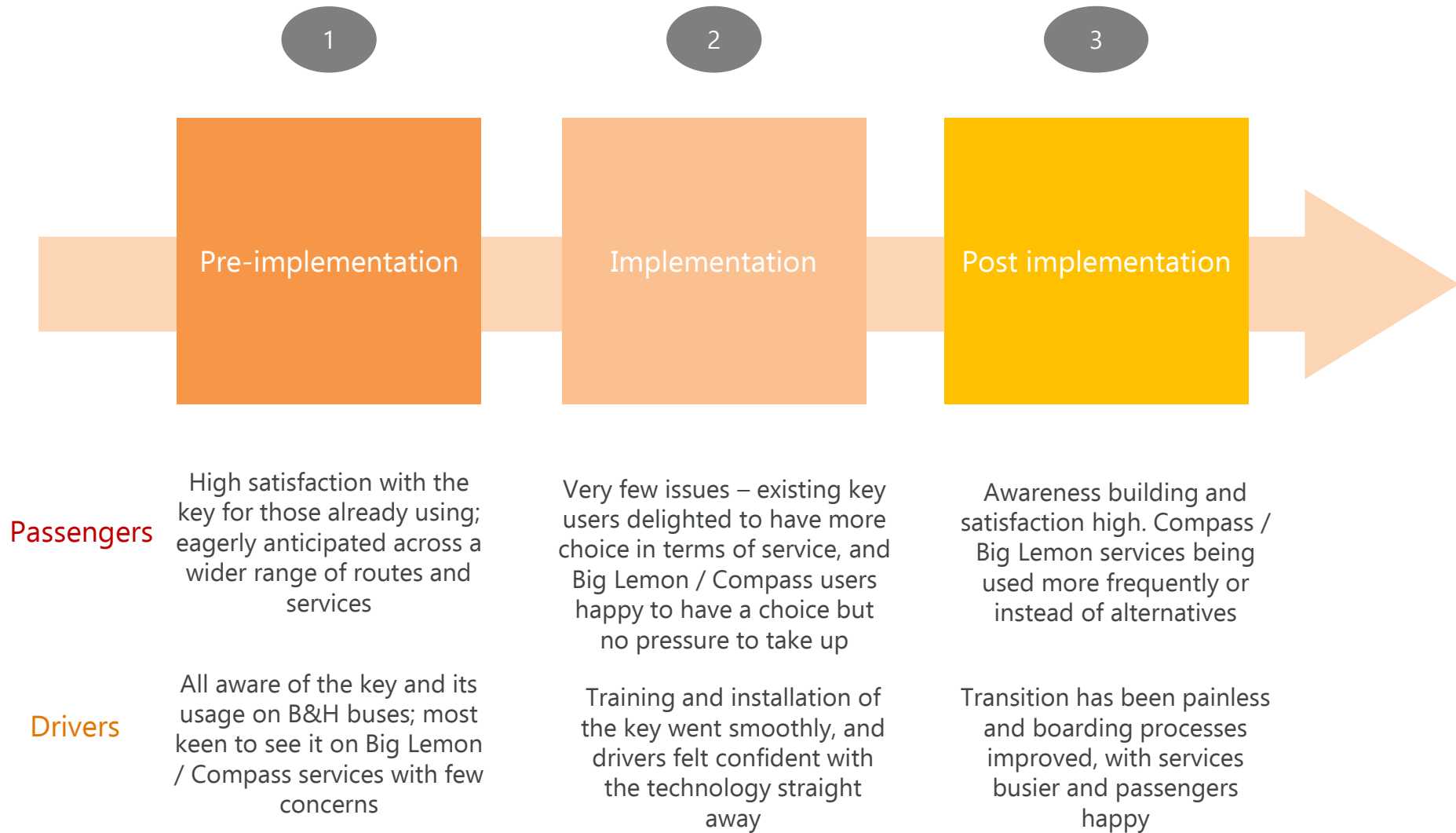
Research objectives & who we spoke to

Research objectives and methodology

- The second phase of research was designed to **understand the impact** of the key implementation on the nine Big Lemon and Compass services, specifically:
 - Are bus passengers likely to use **Big Lemon/Compass** services **more**?
 - Are bus passengers **more satisfied** with bus travel in Brighton overall?
- This involved **re-contacting passengers** from the first phase of research who were using Big Lemon / Compass bus services, and now use the key for their bus travel. **Bus drivers** from Big Lemon / Compass were also re-contacted to check on how implementation and usage **matched with their expectations**. Some **drivers** who didn't take part in the first phase of research were also interviewed
- Fieldwork took place from **7th - 12th September 2015**. Re-contact interviews consisted of:
 - 8 interviews with bus users: 2 x face to face & 6 x telephone interviews
 - 6 interviews with bus drivers: 4 x face to face & 2 x telephone interviews
- In order to **understand and observe** the experiences of bus passengers using the key on Compass / Big Lemon services, 2 days were spent on board (Friday 11th & Saturday 12th Sept), intercepting passengers using the key to understand their **attitudes and experiences** to date
 - A small quantitative questionnaire was given to 49 respondents in total
 - Short informal interviews took place as well as observation



Summary of findings over time



Context: Pre-implementation



The key was popular before multi-operator implementation

- Satisfaction amongst those using the key on B&H buses was **high**, with very **few issues** mentioned
 - Extension of the key to Compass and Big Lemon bus services was **seen as extremely positive** for both drivers and passengers
- Main benefits of the key were **ease of use** and **peace of mind**, making bus travel **more attractive** overall
 - **Greater accessibility** through **multi-operator** ticketing – allowing more choice in terms of service and time saving / greater flexibility as a result
 - **More economical** as it would eliminate 'paying twice'
 - The eco-conscious community in Brighton welcomed multi-operator ticketing as a positive for the environment
- Those who were not using the key on the services currently without the technology still believed it to be a **step forward** for Brighton
 - Most just didn't use B&H buses enough to feel they need a key, but all agreed it was a positive and the area was keeping pace with **technology**



Implementation of multi-operator ticketing represented an improvement, albeit small scale, for the future

- In the grand scheme of desirable bus network improvements, multi-operator ticketing was not at the forefront of most passenger's minds
 - They tended to focus more on delays, routes and congestion / crowding
- Key implementation across all three local providers was expected to make bus travel **more economical, easier, and more flexible** for the passenger
 - They would no longer be **restricted** by a ticket that only worked on one provider's buses
 - But as Go-Ahead (B&H Buses) has by far the greatest number of services and routes in the area, this would be an **evolutionary** more than **revolutionary** development in general
- Drivers tended to see **more potential benefits**, and particularly welcomed the idea of not having to handle cash, challenge people who may be trying to use a ticket that was not valid, and generally speeding up the boarding process
 - They hoped it may make their employers **more successful**, as well as their own lives simpler

Piloting the key: Implementation Experiences



Drivers were pleasantly surprised at the ease of setting up and getting started with the key

- Some drivers, particularly the **less tech savvy**, admitted trepidation at learning a new system and the possibility of problems that they may not know how to address in the early days of the key
 - The majority were **confident and positive** from the outset
- All drivers were trained on a replica machine in the depot, using sample key cards. For most this took **five minutes**, and even those less open to the change mastered the system within **10-15 minutes**
 - Training was **brief and straightforward**, reflecting the ease of the system and instilling confidence
- The new machines impressed by providing extra benefits to the drivers, that even the most positive had not envisaged
 - Reports are **automatically downloaded** to the depot when the bus arrives there, saving time
 - ATM style layout of the machine is felt to be **more user-friendly** than previous machines, with ticket selection much **quicker**
 - Cues in terms of **beeps** are helpful
 - Don't necessarily have to watch!

One of the more reluctant ones was so worried about driving for the first time with the new machine, but on his break he called me and had nothing but praise for it; he couldn't believe how much easier it was!



Passenger awareness of the implementation was usually through friends and family or simply noticing a change

- Awareness of the key's extension was **seldom picked up** through the communication channels controlled by providers, instead it was normally through:
 - Friends / family
 - Asking bus drivers
 - Social media – friends posting on Facebook
- No one reported noticing or responding to **adverts**, either on board relevant buses or within the local area. Relevant buses tended to carry some indication that the key would now be accepted, but it was considered **hard to spot or read** (easily overlooked) when looking to board a bus
 - Ongoing acceptance of cash meant **no problems were generated** – the key was simply an additional option
 - The collaboration of Brighton & Hove City Council and the bus companies is **not visible** to most bus passengers



How well does the experience of the key match expectations?



Greater ease and money saving are stand out benefits, particularly for established key users, meeting expectations

- The ability to use the key across three different bus services is a **significant benefit**, making bus travel within Brighton:
 - More **economical** – no need to buy separate paper tickets, which is more expensive, for Compass / Big Lemon bus journeys
 - **Standardised** – one form of payment and price across bus services within Brighton
 - More **accessible** / **easier** to access – A wider range of bus services can be chosen to make a particular journey, both when planning and en route
 - **Sharable** - the key can be shared amongst family / friends (!)
- Some of the **more financially savvy** noted that it would now be **worth their while** to purchase **monthly** or even **yearly** citySAVER tickets on the key, which are **significantly cheaper**
 - Since they would now be using a key for **all**, or the **majority**, of their bus journeys



I've actually got on a Compass bus before and had to get off because I wasn't about to pay again, so I've been waiting for this really

It actually makes sense for me to now purchase a key as I will be using it day in day out for all the bus journeys I make

Choice of bus service provider for key users is a significant benefit, and presents options not previously considered for some

- Many Compass / Big Lemon passengers seem to be choosing these newly enabled buses **over B&H bus services**, particularly at the **weekend** for **leisure** journeys
 - People were choosing Compass' **37** service to **Sainsbury's** in Lewes Road, whilst others were using Compass' **47** service to travel to/from **Brighton Marina**
- The ability to choose **whichever bus arrives first**, regardless of operator (for speed / convenience) is the stand out benefit, but it is apparent that Compass / Big Lemon buses are often considered more **desirable** than B&H buses, and journey experiences are considered **more pleasant** than those with the dominant provider:
 - **Less busy**
 - Better **customer service** from the bus drivers
 - A **happier** and **calmer** environment
 - A sense of **community** – friends and acquaintances gained whilst on board
- Many claimed that they would aim to use Compass / Big Lemon over B&H buses when repeating similar journeys now this is a **viable choice**
- In this respect **expectations have been exceeded** in some cases





Bus users - In their own words...

Compass have introduced it which suits me down to the ground

Once my yearly citySAVER ticket runs out I'm going straight to the 1 Stop Shop and purchasing myself a key

Now when I'm at the bus stop I can basically jump on the first bus I see, which often is a Compass!

I've always thought Big Lemon was an exclusive bus for students, so it's nice to see they've opened up by accepting the key

I've had my key card for years, it's just nice to know I can now use it in the weekdays when I'm going to school



Bus drivers also reported that their expectations have been met or even exceeded

- Most reported **real benefits** as a result of key installation
 - In terms of passenger experience but also in terms of the ease of their job when driving
- Main benefits felt by bus drivers were largely **those anticipated** ahead of implementation:
 - **Enhanced driver safety** – not carrying significant amounts of money
 - **Easier** and **quicker** boarding of passengers
 - Fewer **complications / altercations** with passengers caused by issuing / accepting paper ticketing or incorrect change
- All this allows bus drivers to **focus** on driving their route, maintaining a **calm and friendly atmosphere** for the passengers, and improving the day to day atmosphere and experience

Once they see the red light of no acceptance from the machine they don't question it, and there are no arguments, it's so much easier than before



Bus drivers – in their own words...

It's made a big difference revenue-wise, without a doubt

Cash has dropped right off – gone are the days of carrying fifty quid's worth of change around with us

If you're running late and need to make up time, you can easily do so now. In general it's just an easier life for the driver than before

It's just made bus travel more accessible - from teenagers up to the older people, they are all getting a key card because it's easier

It's quicker, simpler, better for the passenger, and better for the driver



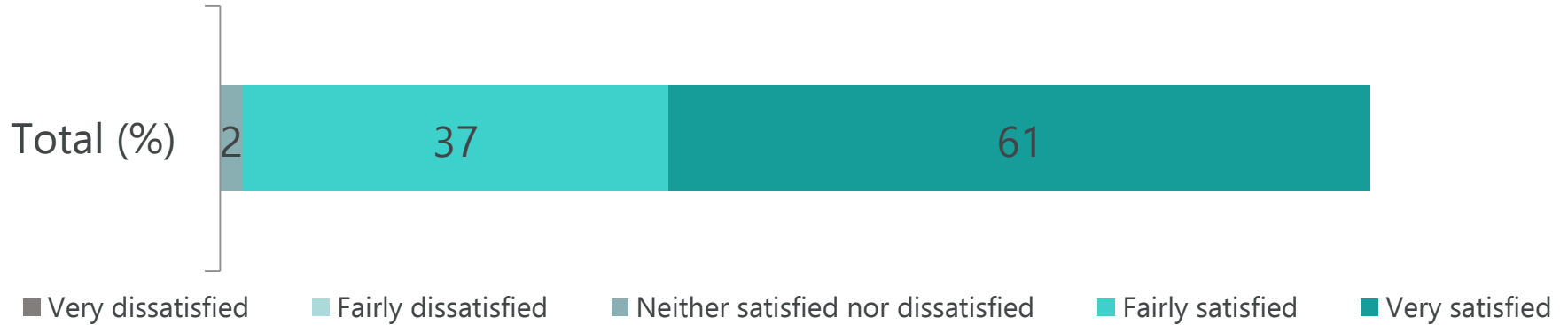
The experience passengers receive on our buses is apparently so much nicer than that on B&H. I'm just glad the key allows them to use us more

What impact has the key had, and how well has it met project aims?

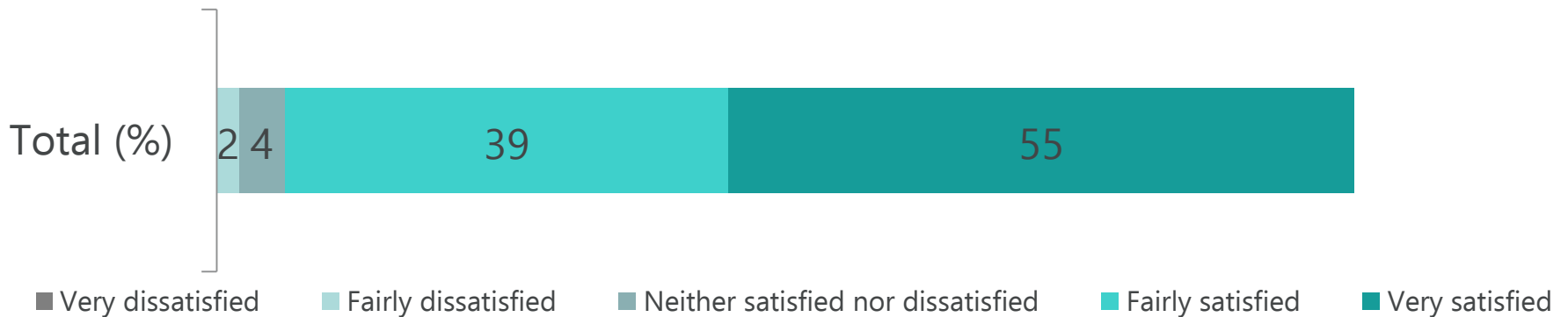


Passenger satisfaction with the key is high across all three operators

How satisfied are you with using the key on Compass / Big Lemon bus services?



How satisfied are you with using the key on Brighton & Hove / Go Ahead bus services?



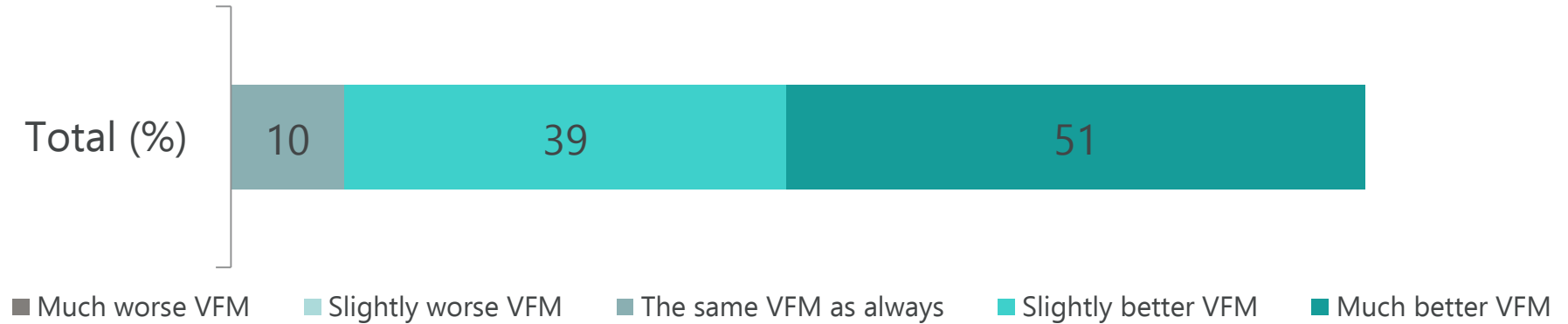
* Caution – low base

Base: All (49)

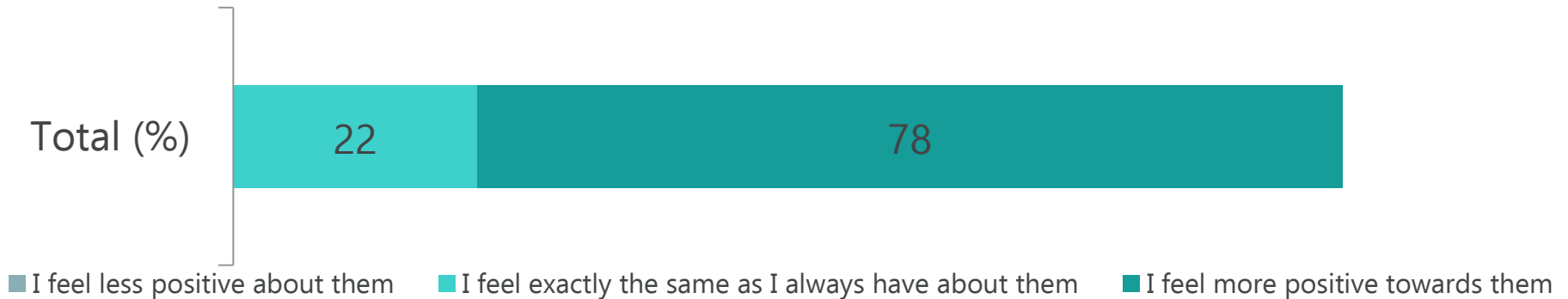


The key has made people much more positive towards Compass and Big Lemon, with value for money perceptions generally enhanced

Thinking about the value for money of bus travel, has being able to use the key on Compass / Big Lemon services made you feel that bus travel is ...?



And do you feel any differently about Compass / Big Lemon as companies since the introduction of the key for travel on their buses?



Base: All (49)

* Caution – low base



However, this same sense of greater value makes lack of financial viability a slight concern for some drivers

- Some felt that B&H would be taking the 'lion's share' of the profits from purchases of the key and perhaps only refunding a **small proportion** to Compass / Big Lemon in recognition of carrying passengers
 - It was felt likely that purchase / payment would usually be done on a B&H service
 - So the **flow of money** direct to the smaller services was greatly **reduced**
- This was felt to be reflective of the larger market share that B&H had in the area, and the status of Compass / Big Lemon as a '**poor relation**'
- However, as most had experienced an **increase in passenger numbers**, there was a feeling that even on a lower proportion of the fare, the finances could 'even out' because of the higher volume of passengers on each service

I'm sure the bosses know what they're doing, I just hope its working out financially and they aren't being taken advantage of really

There are definitely more people on the buses now, I really noticed it over the summer. Even if we get a smaller proportion of each fare, I guess we could still be making the same amount of money or more if the numbers carry on going up



Vast majority claimed to be more likely to use Compass and Big Lemon as a result of being able to use the key

Now that you can use the key for travel on Compass / Big Lemon bus services, which of the following applies to you?



I've met a lot of nice people on Big Lemon who I like speaking to and seeing, so I like that I can use their services more now and see them

It's more than just a school bus now, it feels like anyone can use it because of the tickets and you can see there are more adults on them already

Base: All (49)

* Caution – low base



Higher passenger volumes already evident to drivers

- Most drivers recalled that before implementation **disgruntled bus users** had to be turned away reasonably often due to non-acceptance of the key
 - Drivers were **confident** that users **would return** now that the key is accepted
- Some felt that ongoing uncertainty as to whether the key is accepted demonstrated that awareness of the scheme's extension is **low**, and that on board **advertising** is **not being picked** up by users
 - However, they still perceive enquiries as **encouraging and positive**, since it showed that customers **want to use their services**
- There was great confidence that bus passengers would choose to **use their services more** in the long term, now that they have the option to do so
 - Some stated that they are **often told** by bus passengers that the customer service they provide can be **better and friendlier** than that received on competitor routes
 - Many had noticed a **higher volume** of passengers on their routes since August, and on some days **more revenue than expected**, mostly coming from key payments

People want to use our services more than B&H for plenty of reasons, and now the key allows them to do so



Potential data generated from the key was considered resoundingly positive

- When prompted on the data that the key will generate for Compass / Big Lemon, all passengers and drivers could think of **only positive** things that this could bring for the companies and passengers alike
- Some believe it will allow the bus companies, Compass in particular, to **re-route** certain services based on footfall at current bus stops
 - Some feel that currently there are bus stops on the way to Bristol Estate & Meadowview which do not **require regular servicing due to low demand**, especially at **off-peak times** and **weekends**
- Some bus drivers also felt that data generated could help both them and the bus companies to run bus routes **more efficiently** and carry out their jobs **more easily**, in terms of:
 - Generating reports, with **minimal effort required**
 - Automatically and easily **calculating revenues**
 - Allowing **targets** and **progress to targets** to be easily **viewed** and **managed**

Conclusions

Conclusions

- As a result of multi-operator ticketing, existing high satisfaction with the Brighton bus network has increased further. It is felt to provide **bus users** with more:
 - Choice
 - Flexibility
 - Freedom
 - ...and most importantly, better value for money
- Some passengers felt Compass and Big Lemon bus services performed better than B&H buses in terms of **service** and overall **customer experience**
 - As such, these users are pleased that they can now choose Compass / Big Lemon services instead of B&H buses, particularly for **leisure journeys** at the weekends
 - Most expected to use Compass / Big Lemon bus services **more** as a result
- Bus drivers were generally very positive about implementation
 - Initial roll-out has gone **smoothly** and all were **confident** that they will **experience more passengers** on their buses as a result, with some claiming to already have seen this
 - Some concern over financials, but felt to be cancelled out if footfall is greater
- For passengers and drivers alike, the process of implementation and the experience of multi-operator ticketing has met, and frequently exceeded **expectations**



Thank You!