

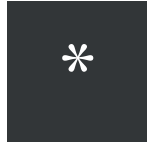
DEPARTMENT FOR TRANSPORT

Increasing bus patronage through an audience strategy

Introducing the bus segmentation

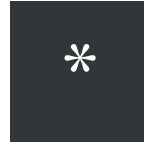
.YONDER

Key headlines



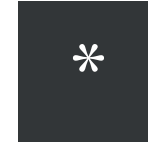
BUS USAGE IS LOW, LINKED TO DOMINANCE OF CAR

- 80% of English adults were found to use the car at least once a fortnight.
- Though bus is the next most frequently used mode of transport, only 23% of adults were shown to use the bus at least once per fortnight.



BUSES UNDERPERFORM ON UNIVERSAL TRANSPORT NEEDS

- Research has outlined reliability, ease, safety, journey time and flexibility as universal transport needs
- Currently, buses aren't performing against key transport needs: Namely, reliability, journey time and flexibility



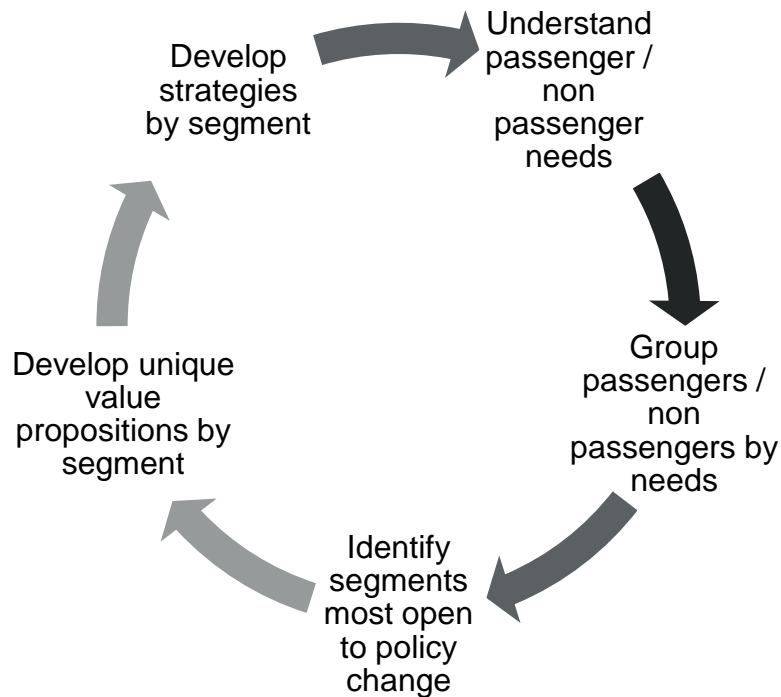
BUSES CURRENTLY ONLY APPEAL TO EXISTING USERS

- Existing bus users are most likely to use the bus in the next 6 months. The reverse is true for those who never use the bus.
- Bus users have a known profile – typically: aged under 34, Londoners, ethnic minorities, and found inner city areas.
- After universal needs, it is crucial to widen the audience buses currently appeal to. This can be achieved via a segmentation.

Background & Methodology

Your objectives

The Department for Transport (DfT)'s overall objective is to increase bus usage by being able to develop strategies and policies that will drive behaviour change.



To do so they wish to:

1. Understand landscape of existing, near and far bus users
2. Segment current and potential bus users based on attitudes and behaviours towards bus travel
3. Understand segments based on higher and lower propensity to use buses
4. Bring segments to life via personas illustrating their differing attitudes towards buses
5. Allow DfT and stakeholders to understand what drives behaviour by segment to develop policy to influence behaviour
6. Deliver a toolkit for operators and local authorities to encourage behavioural change

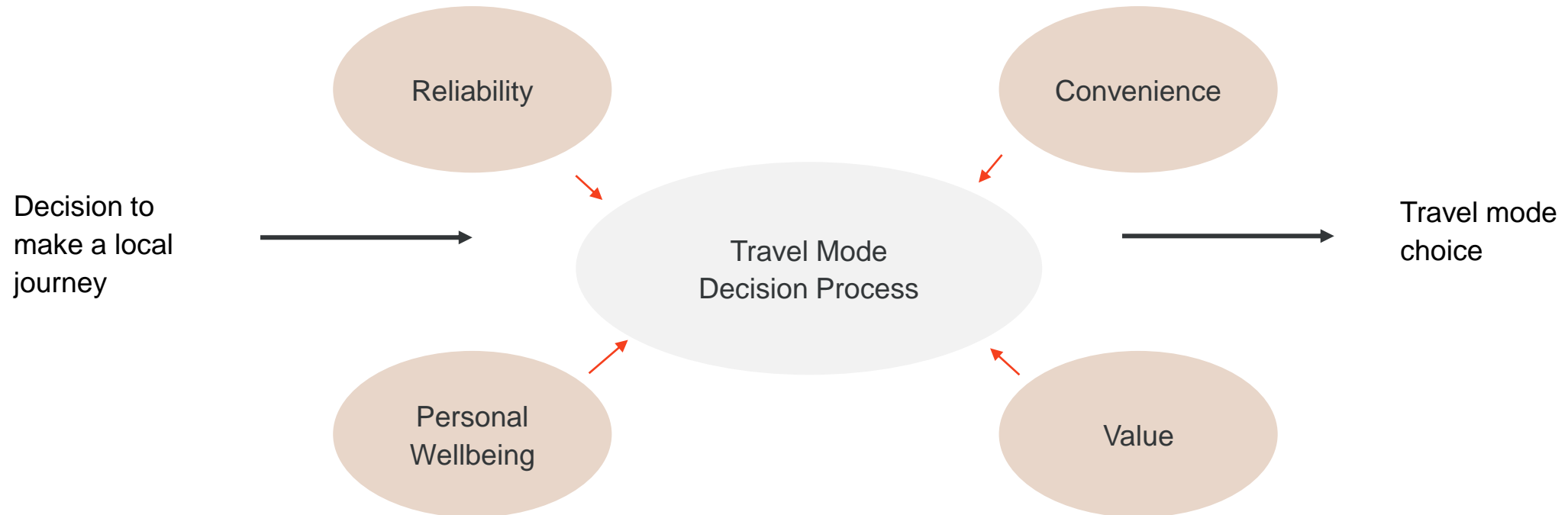
Understanding the current challenge

Various transport needs exist in relation to mode choice

Considerations when choosing which mode of transport to use group into 4 overarching need states - with specific considerations then at play within each one.

The transport mode decision process is not linear. All needs come into play at any one time.

- However the strength and implication of need varied across different audiences



Understanding these needs starts to reveal key opportunities to develop bus service strategies against

Reliability

People want to feel confident you can get from A to B in a timely manner that doesn't disrupt plans

Helps one feel relaxed, at ease, able to focus on other tasks

Convenience

People want things to be:

- As straightforward, easy, flexible as possible
- *Fit around my plans / needs*
And 'tools' to enable this

Users want to have a service that revolves around their needs, rather than compromising for their mode of travel. This works to heighten perceptions of control and confidence

Personal Wellbeing

People better engage where there's a perceived sense of personal wellbeing - be it feeling safe, comfortable, warm, relaxed etc.

Putting one at ease, making it a more enjoyable experience to repeat

Value

Value of a mode can be assessed in terms of:

- Monetary value: is it good value for money
- Social Value: what does this say about me; what is the environmental impact

. . . And how this makes me feel about choice of mode

Where these needs are not met, it can create worry, even anxiety and anger. Which, in turn, can negatively impact on one's day and create reluctance to use the transport mode underperforming here

Car most consistently delivers against these transport needs, making it the dominant mode of choice for many

Reliability

"I'd rather rely on myself and take the car, particularly if I need to be somewhere"

Aged 25-45 years

"It's outside the house (car), door to door. I have hospital appointments I have to be at and can't be late"

Aged 40-60 years

Convenience

"If I took the bus, I'd need to get one into Reading and then out to Newbury. It'd take about 1.5 hours, but I can drive it in half an hour"

Aged 24-40 years

"If I didn't use the car there'd be a lot of waiting around, I'd have lots of changes"

Aged 40-65 years

Personal Wellbeing

"Speed, efficiency and safety is what I want. I leave the office late and I know I'm safe in the car on the way home"

Aged 50-70 years

"I use the car. I don't want to arrive where I'm going to be all flustered and stressed out"

Aged 50-70 years

Value

"Here in Manchester, it's about £8/£9 . . . Well, I can't warrant that when I've got a car that wouldn't cost me that"

Aged 40-60 years

"If it's more than one of you then it certainly makes sense cost wise to take the car"

Aged 50-70 years

Beyond car, other challenger modes are meeting certain needs making them an attractive option

Other transportation modes were seen to better deliver on transport needs over bus. Within built up suburban/inner-city areas, they were sometimes seen to deliver on transport need over car.

TRAM



Direct, reliable, comfortable
Feels more clean, modern

“The tram is very good value and like luxury compared to the bus” Aged 50-70 years

TRAIN



Direct, reliable, quick
Value for money - particularly where group fares

*“I’ll take the train into town, I’m there in 4 minutes. The bus takes at least half an hour”
Aged 25-45 years*

BICYCLE



Reliable, flexible, healthy, ‘green’

*“I enjoy the freedom, the independence. You’re not reliant on others, it’s not crowded and it’s a great 30-minute work out session”
Aged 24-40 years*

TUBE / DLR

(and River Taxi for London)

Direct, reliable, quick

“I’ll take the DLR - about the same price and quicker” Aged 24-40 years

“The river boats are quick. 20 minutes and I’m straight in” Aged 24-40 years



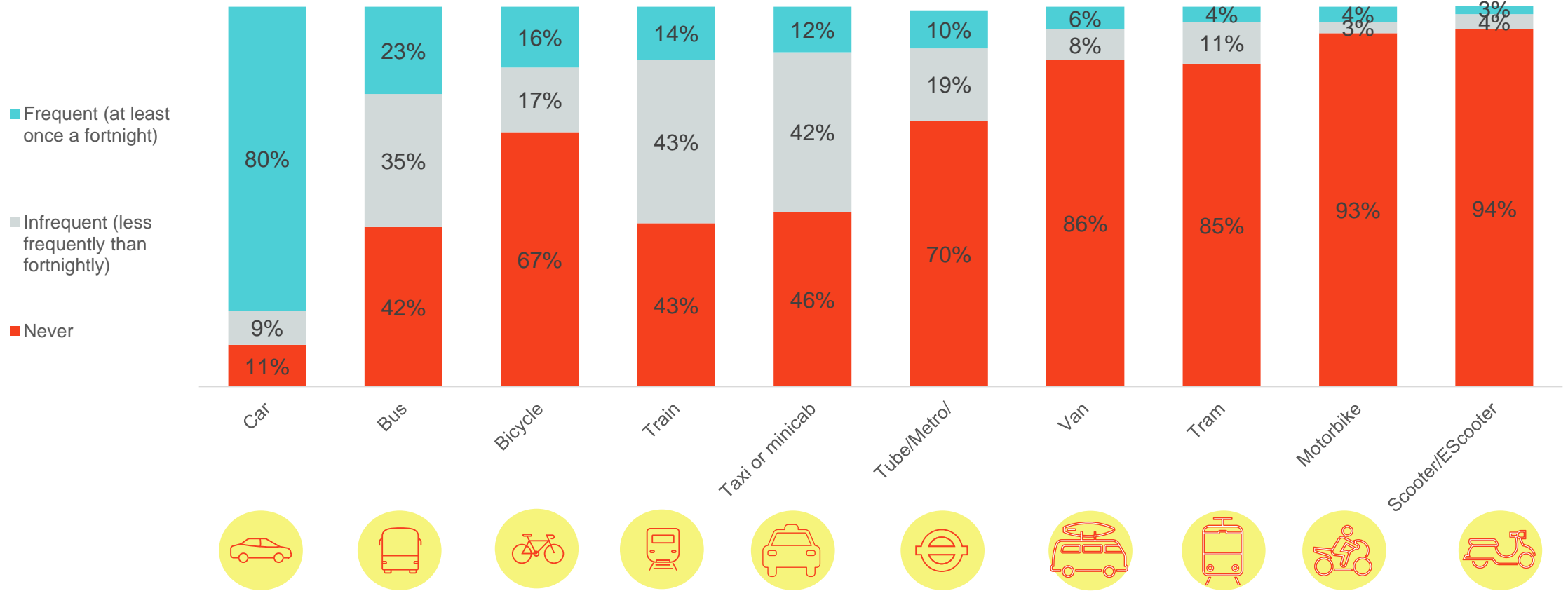
TAXI / UBER



Flexible, convenient, door to door
Can be similar price to single bus fare
Considerably cheaper for group travel

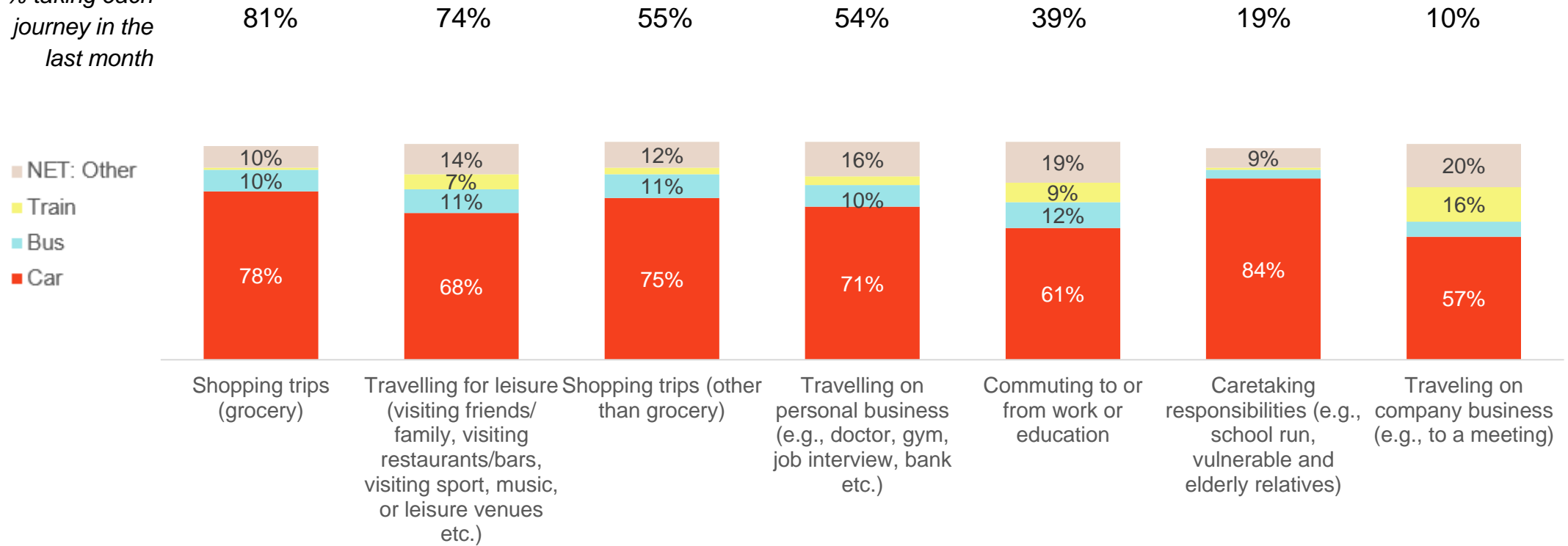
*“I think there’s 3 of us, which’ll be £4 by Uber. But it’d be £8 each if we went on the bus”
Aged 40-60 years*

Car is the most frequently used mode of transport. A key challenge in increasing bus patronage is overcoming this.

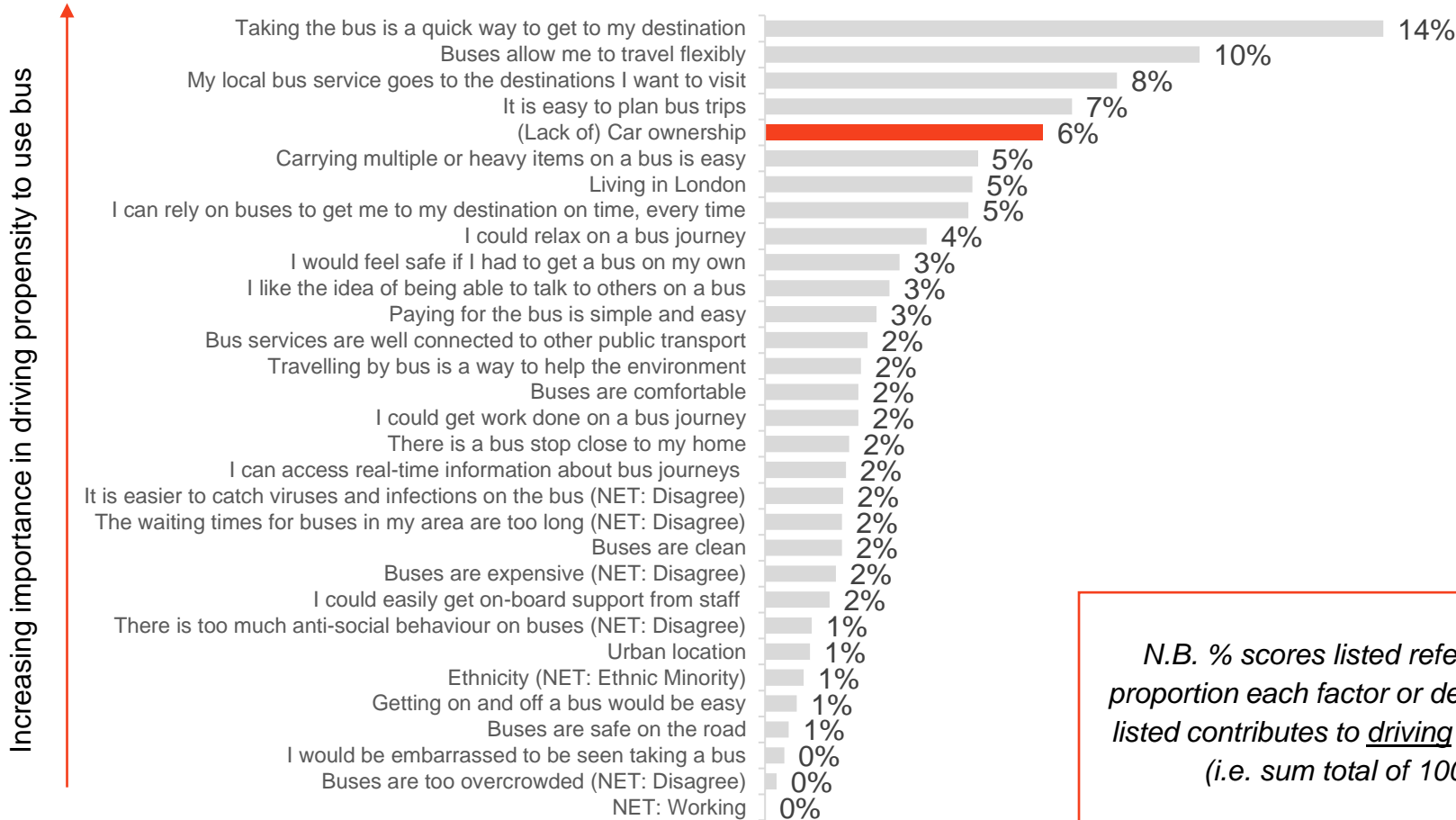


As car is the most common mode across all journey types, it is the primary challenge in encouraging bus usage

% taking each journey in the last month

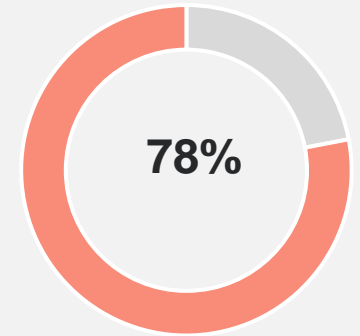


Car ownership is very high, and this is a key driver of likelihood to use or not use the bus



N.B. % scores listed refers to the proportion each factor or demographic listed contributes to driving propensity (i.e. sum total of 100%)

% who own car(s) within the household



So what...

As cars are highly prevalent and a key driver of bus usage, significant intervention is required to push away from cars, and pull towards the bus.

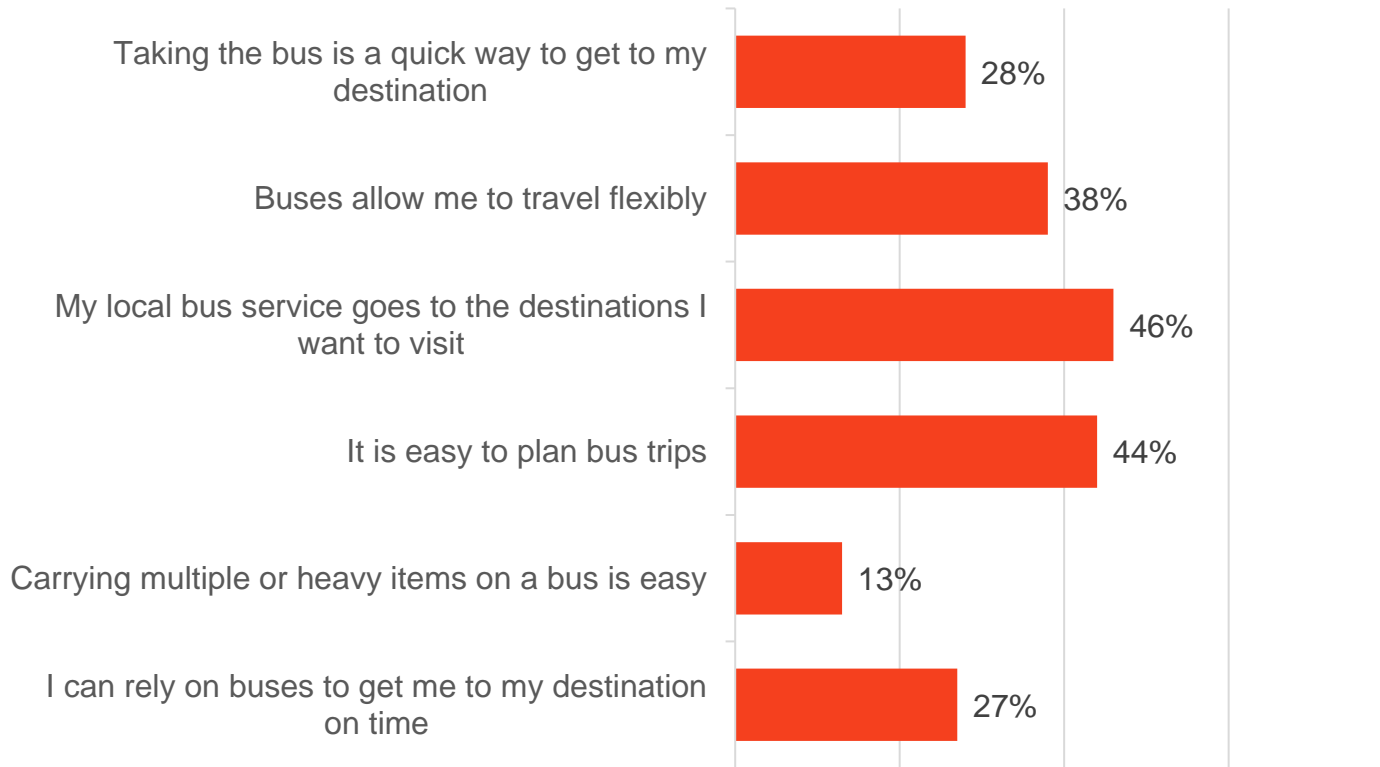
The R² for this drivers' analysis is 0.49. This tells us that 49% of the variability in propensity to use the bus is explained by these factors.

Q16. To what extent do you agree or disagree with the following statements regarding buses in your local area? Q21. How many cars do you have in your household? Base: All respondents (8041)

Currently, buses aren't performing against key drivers, and this is the immediate challenge

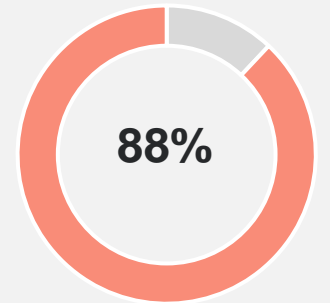
Attitudes towards bus - % Agree

Ordered on importance in driving propensity to use bus



Benchmarks: Performance of bus on other measures
 Lowest score: 7% Midpoint score: 41% Top score: 74%

% who agree cars are more convenient than public transport



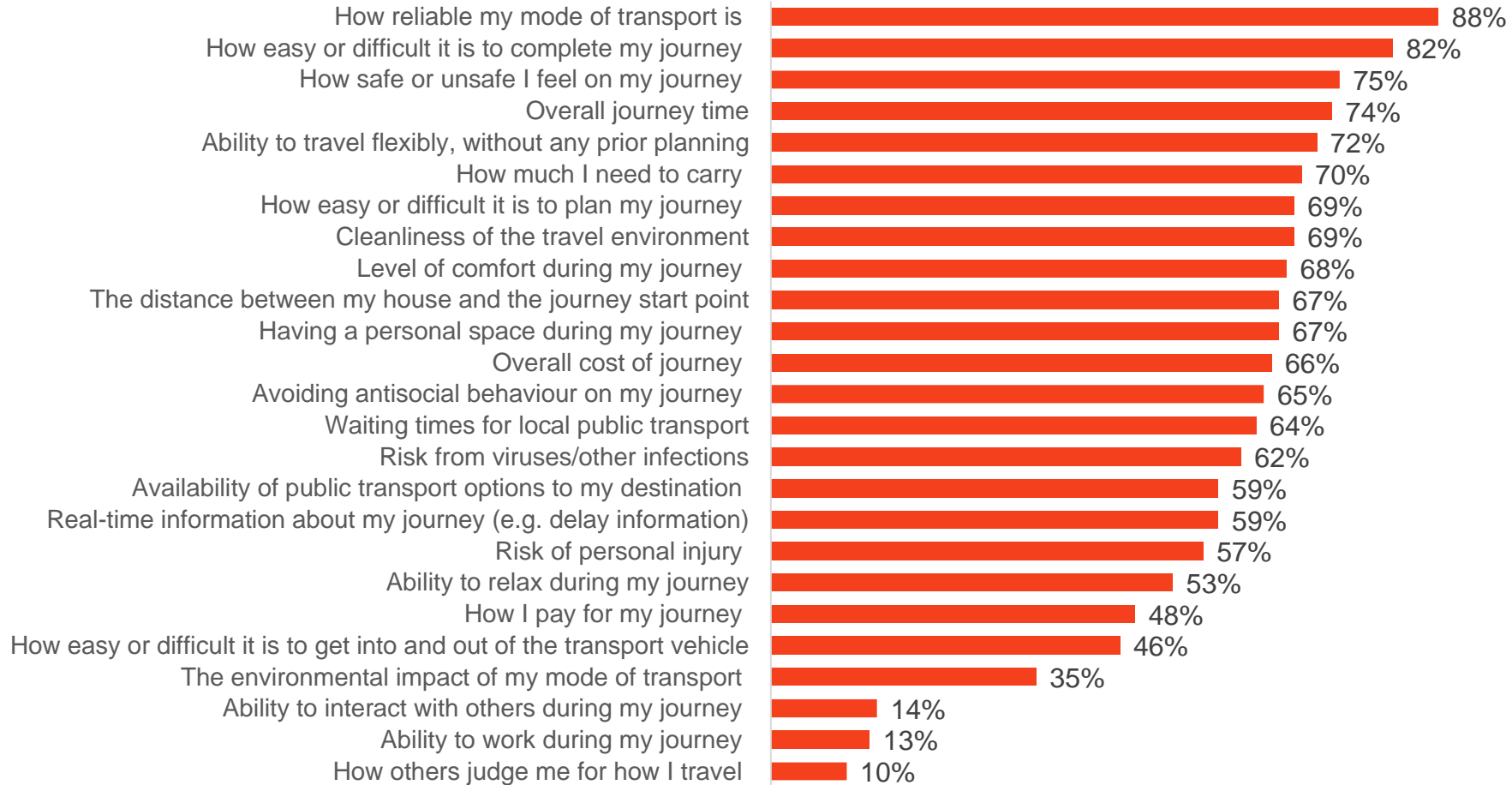
So what...

Through their flexibility and perceived relative speed, cars outperform bus on the key drivers of propensity to use.

Without addressing cars' dominance on these top drivers, only small gains can be made in increasing bus patronage.

Driving future bus patronage

Reliability and ease of transport were the top two most important factors



*“It’s door to door. I have hospital appointments I can’t be late for”
Aged 40-60 years*

“It’s the easier option not to take the risk and just jump in the car” Aged 25-45 years

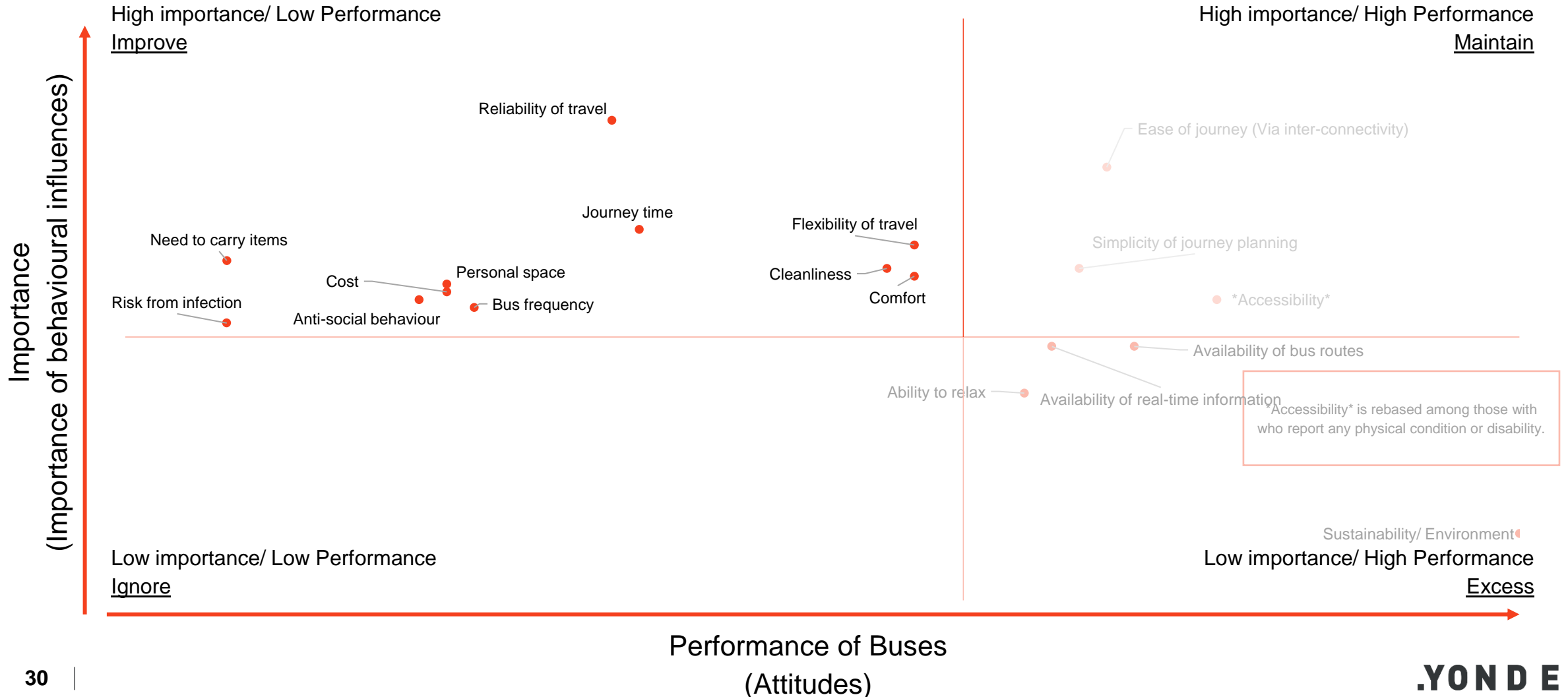
“The car is convenient, outside my door, no one else to rely on. I decide where I want to be, at what time, when I want to come back.” Aged 50-70 years

“I leave the office late and I know I’m safe in the car on the way home” Aged 50-70 years

*“To Sutton by car it’s 12 minutes. By the time I’ve caught the bus and changed it’s 45 minutes”
Aged 40-65 years*

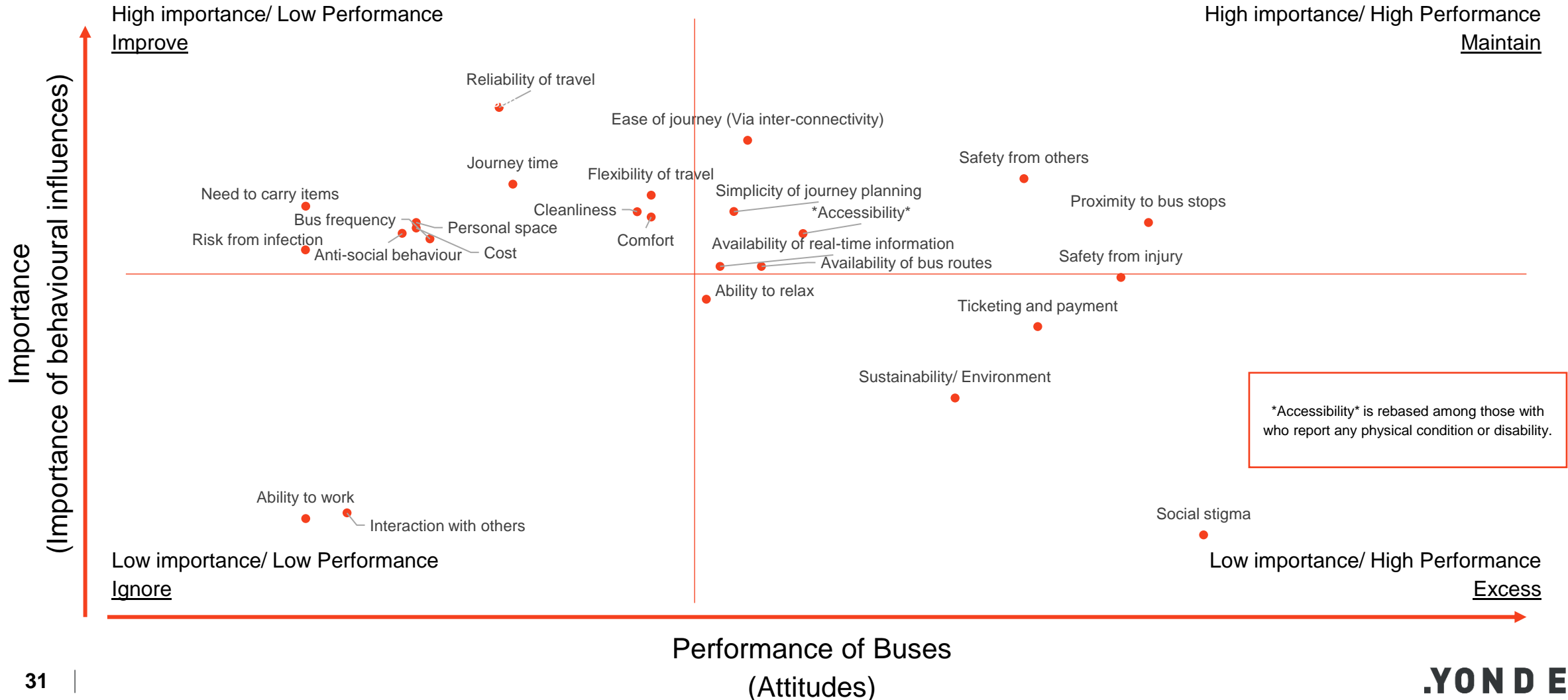
Focus on the “improve” quadrant to ensure the bus meets universal needs of transportation

N.B. The axis boundaries are determined by the (national) average score for factors tested at Q13 and Q16.



Other quadrants can identify which factors need to be maintained, which should be ignored, and which are in excess at a total level

N.B. The axis boundaries are determined by the (national) average score for factors tested at Q13 and Q16.



Buses do not perform adequately in the key transport needs for many, meaning it is not considered

RELIABILITY

Lack of reliability creates worry, stress. Exacerbated by:

- Thought of possible delays
- Not knowing extent of delays
- Feeling 'not in control'

"I've had many an occasion when the bus hasn't turned up or it's turned up late. It's the unreliability of them that worries me" Aged 24-40 years

"The thought just stresses me out. How long will it take, will I get there on time" Aged 40-60 years

CONVENIENCE

People gravitate to 'what works for me'. Bus can feel at odds with this:

- Out of sync with my needs
- I need to work around it
- 'A hassle' to engage with

"It's not straightforward to plan a bus journey. The maps are quite confusing" Aged 24-40 years

"Everything's so fast paced now that the idea of waiting 20 minutes for a bus . . . I just don't have the patience" Aged 40-60 years

PERSONAL WELLBEING

Many factors can impact:

- Anti-social behaviour
- Fear of infection/illness
- Unclean, dirty bus interiors
- Waiting at dark bus stops
- Erratic driving, boredom, delay anxiety etc.

"Yes, I'm always on high alert on the bus. You do get 'characters' on there" Aged 40-60 years

"I don't like paying for the privilege of being jostled around in a dirty tin can" Aged 50-70 years

VALUE

Bus can feel expensive. This is both:
Known expense vs. other modes

Assumed to be more expensive

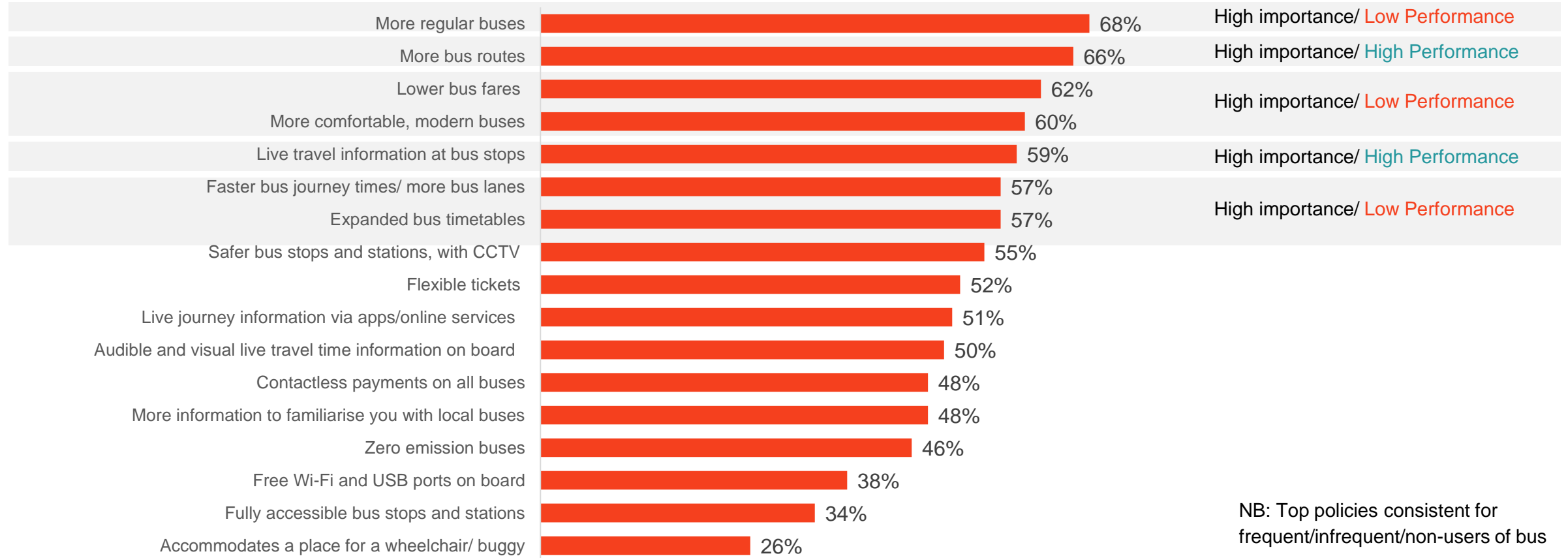
- Fueled by lack of clear pricing information + confusion over fares, how they work

"I'll use a bus in London, but not in Manchester. The disparity in prices is scandalous" Aged 25-45 years

"It's not easy to see the cost on the website for a bus company, to work out what it might be" Aged 24-40 years

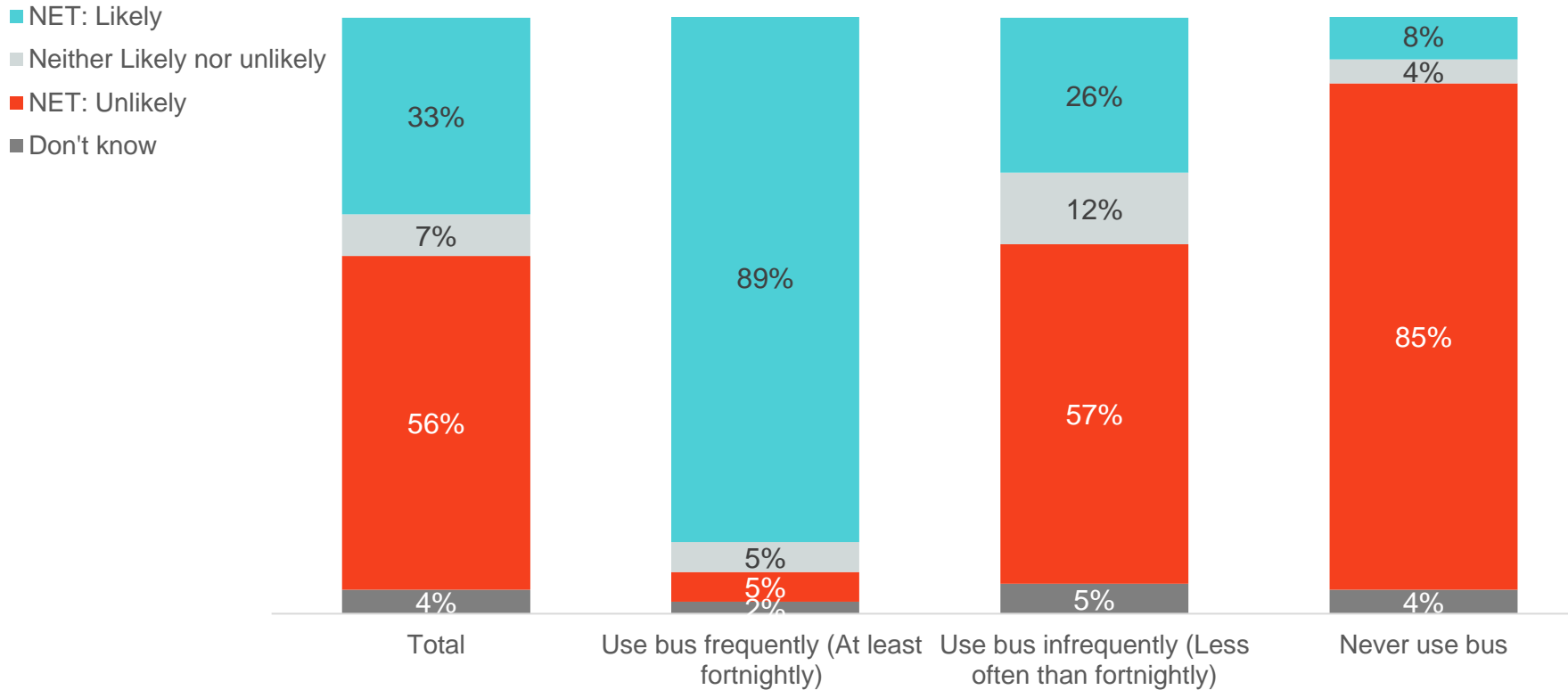
Policies that were reported as most likely to drive bus patronage are directly linked to key performance areas

Position in quadrant (from previous slide)



NB: Top policies consistent for frequent/infrequent/non-users of bus

Those who intend to use the bus in the future are mainly already frequent users



Bus users tend to fall into distinct socio-demographics - we need to widen the audience buses currently appeal to

Frequent bus users (at least fortnightly) more likely to be..



16-34



London



ABC1 – Higher socioeconomic groups



Ethnic Minority

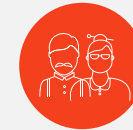


Inner-city/Suburban area

Infrequent bus users

Demographic profile matches the national picture

Never use the bus more likely to be...



55+



West Midlands/East Midlands/East of England



Physical health condition/disability



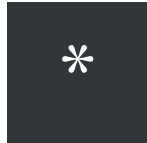
White



Town/Village/Rural

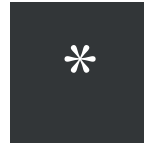
Learnings so far

The story so far...



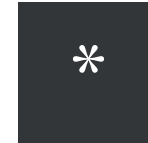
OVERCOMING PREFERENCE FOR CAR IS THE NUMBER ONE CHALLENGE

- Car is by far the most used mode, given its ability to address universal needs of transport.
- There is a secondary challenge of other modes of transport (e.g., taxi) which can deliver on some needs more than bus
- Stakeholders will have to consider the best way to combat this: either using push policies (to discourage car use), or focusing on pull policies (towards bus)



BUSES MUST MEET FUNDAMENTAL AND UNIVERSAL TRANSPORT NEEDS

- To compete against cars in the long term, policies are required to deliver on the fundamental and universal transport needs of reliability, ease, safety, journey time and flexibility.
- People see an urgent need for buses to improve on their reliability, flexibility, and overall journey time

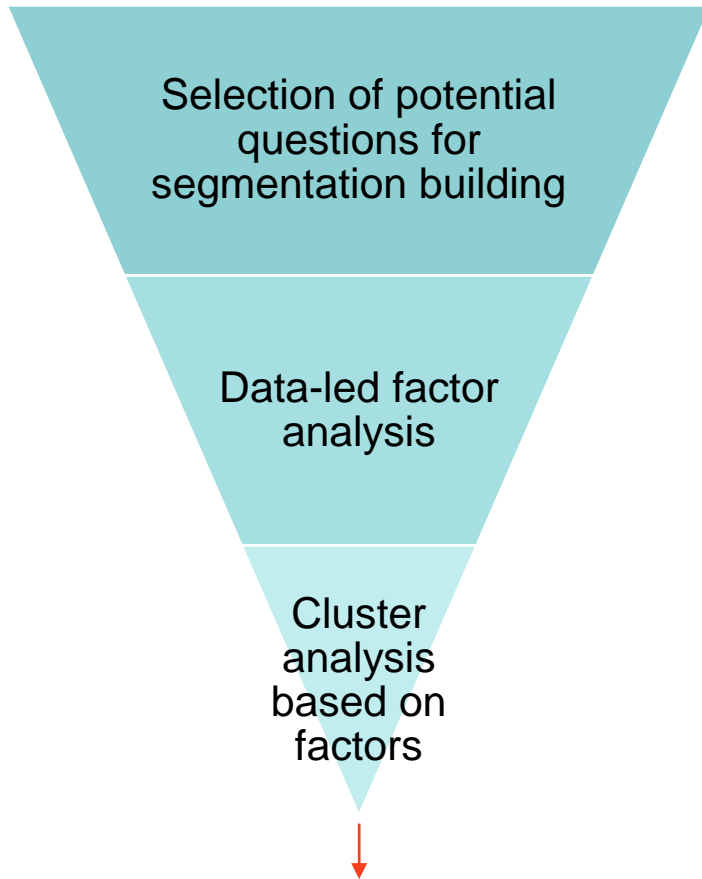


UNDERSTAND THE NUANCED NEEDS OF INFREQUENT AND NON-USERS

- Once these universal needs have been addressed, targeted spending and marcomms must be tailored to reach for a wider pool of people
- Understanding the nuances of what is important to different audiences in travel choices will enable stakeholders to create powerful messaging and targeted policies
- A segmentation will help you to achieve this

How we created the segmentation

ca. 8,000 survey data responses



Selection of potential questions for segmentation building

Selecting survey questions for building the segmentation based on the original objectives (identifying different needs and attitudes to drive bus usage). They were also selected to be future proof (so not based in COVID-19 or current interventions).

Questions selected where:

Q13 (Importance of factors driving transport choice), Q16 (Attitudes towards bus), Q23 (Attitudes towards cars). We also selected our proprietary micro-targeting questions to allow alignment to LAA

Data-led factor analysis

We need to condense the questions to ensure the segmentation is reproducible. A data-led principal component analysis was conducted on Q13 and Q16 to identify similarities in the data. This revealed 5 broad 'factors' which were similar between Q13 and Q16.

Factors from Q16 were taken forward as more differentiating and were:

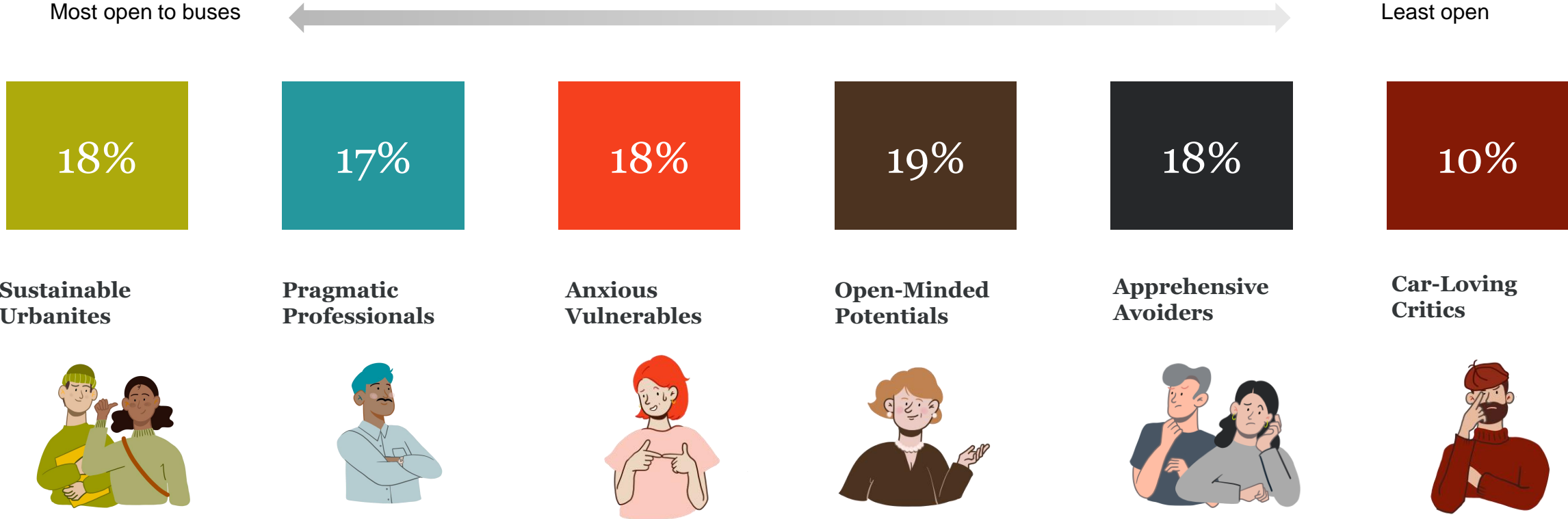
Attitudes to technology, environment consciousness, anxiety towards bus travel, price consciousness

Cluster analysis based on factors

The factors from Q16, Q23 and our micro-targeting questions were used to create the segment solutions. This was a data-led approach that identified natural clusters of individuals within the data based on their responses to these questions.

Golden questions to be created

This led to a 6 segment solution which differentiated on how open they are to buses



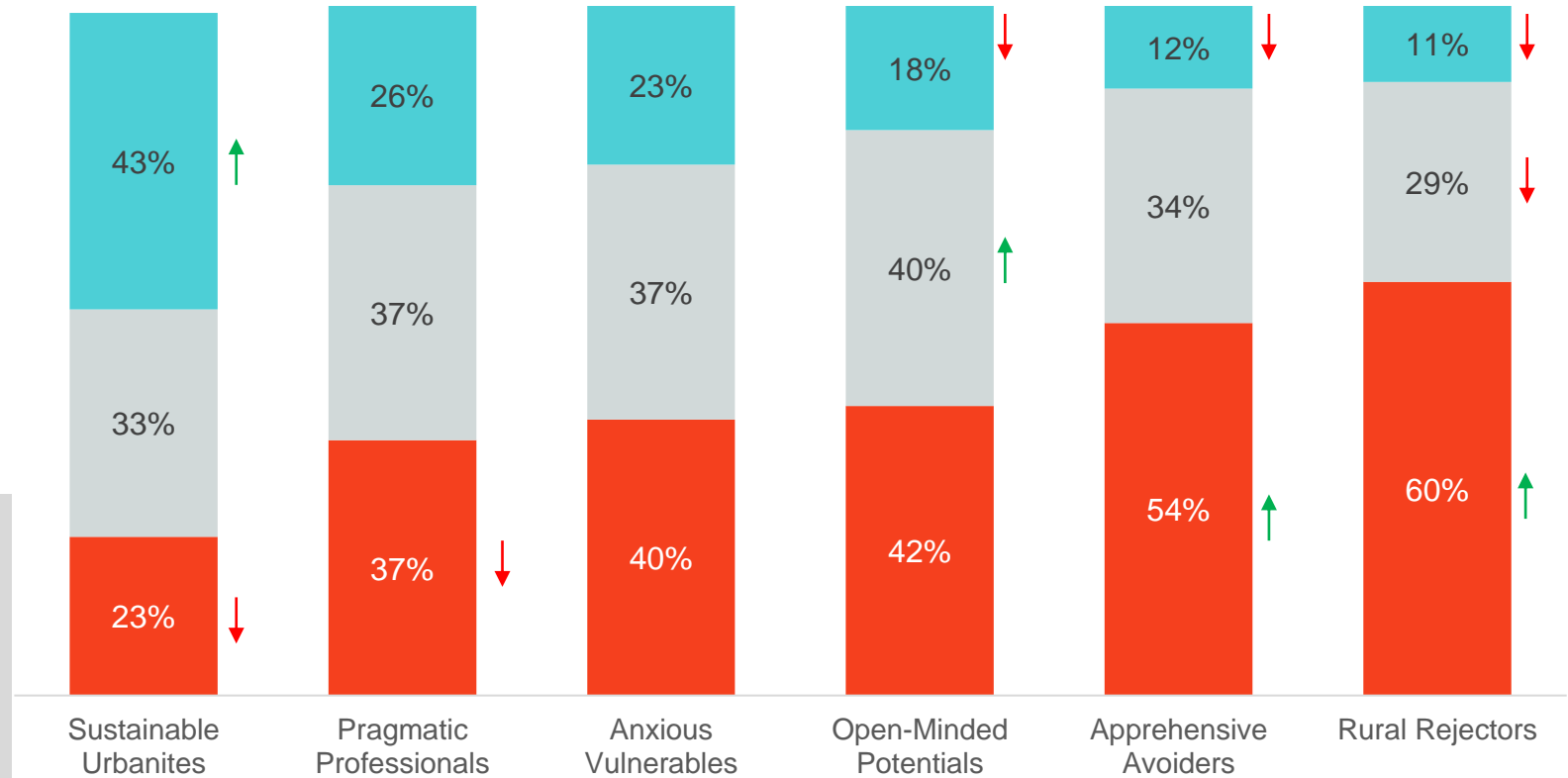
Through consultative workshops with DfT, six distinct segments were developed, facilitating grouping of audiences according to their varied needs. This will enable Stakeholders to create tailored policies and messaging to drive patronage across these groups

The segments differentiate on current usage, allowing us to understand the size of the challenge in each segment

↓↑ Significant at 95% confidence vs Nat-Rep average

■ Frequent (at least once a fortnight)
 ■ Infrequent (less often than once a fortnight)
 ■ Never Use

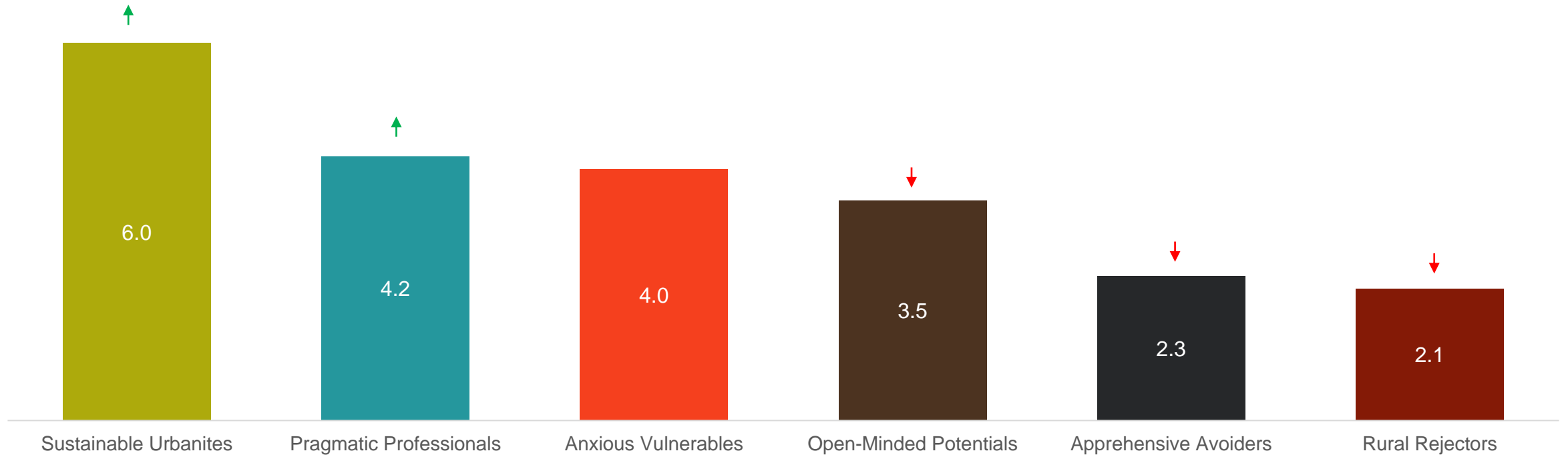
Each segment has its own distribution of bus usage, but there are common attitudinal traits and targetable influences. The focus is not to move people between segments, but to encourage more frequent usage within each segment



LIKELIHOOD TO USE LOCAL BUS SERVICE REGULARLY IN THE NEXT 6 MONTHS (MEAN SCORE 0-10 SCALE)

This trend is mirrored very closely in future intent to use bus – this tells us which segments are easier wins

↓↑ Significant at 95% confidence vs Nat-Rep average

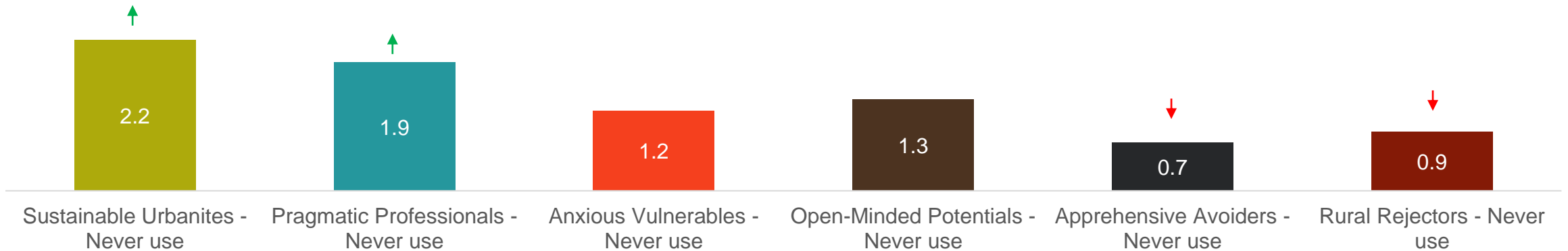


N.B, 0 = EXTREMELY UNLIKELY, 10 = EXTREMELY LIKELY

LIKELIHOOD TO USE LOCAL BUS SERVICE REGULARLY IN THE NEXT 6 MONTHS (MEAN SCORE 0-10 SCALE) AMONG NON-USERS OF BUS

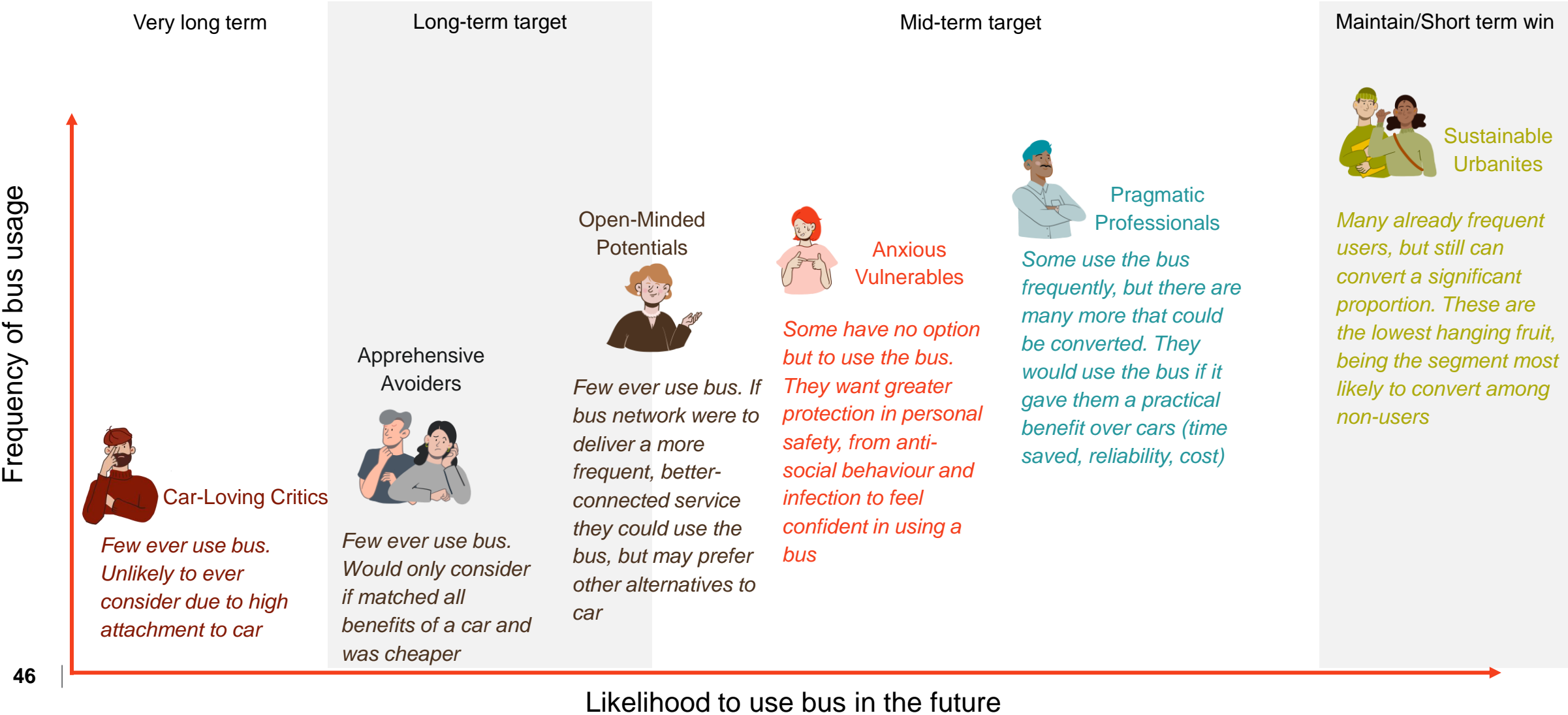
Likelihood to convert varies even among non-users of bus within each segment

↓↑ Significant at 95% confidence vs Nat-Rep average



N.B, 0 = EXTREMELY UNLIKELY, 10 = EXTREMELY LIKELY

Understanding these segments provides us with short to long term targets, with the goal to increase patronage within segment



**How could we increase bus
patronage within each segment?**

Sustainable Urbanites

Sustainable Urbanites Personified



Meet Amy...

She lives on her own in Manchester. Active, busy life, outside of work she loves meeting family and friends, going out to local events as well as the odd art gallery. She's tech savvy and happily uses it to be more time efficient - she loves an app.

She enjoys using the tram to travel around - finds it very quick, easy and direct. Enjoys cycling too when the weather's not too bad - feels it's better for her and the environment. And will pop in her car when it's not convenient to use the tram or calls an Uber (they're so cheap).

She uses the bus on the odd social night out, if she knows the route, and would be open to using it more. But finds it confusing to work out which bus to get to where when she looks online, she worries it might make her late for things as it's hard to plan her journey and thinks it could work out expensive.

“

“I only take the bus if going from home into Manchester as it's a simple, direct journey. But mainly I don't have a clue about what buses to get to where. I feel quite nervous about changing on different buses that I'm not familiar with. Possibly having to walk between bus stops, worrying if I'm going the right way on the right bus. I feel a lot safer and more at ease getting an Uber and the tram - much easier”

Sustainable Urbanites

If the bus were an animal, she'd say...
“An elephant - huge, but it isn't speedy. Not flexible either due to its size and build. There's not much hope if there's a traffic jam and it can easily take longer than expected” Sustainable Urbanites

”

This segment are defined by having positive attitudes towards buses, they are directed by the cost of their journey and do not see cars as cost efficient

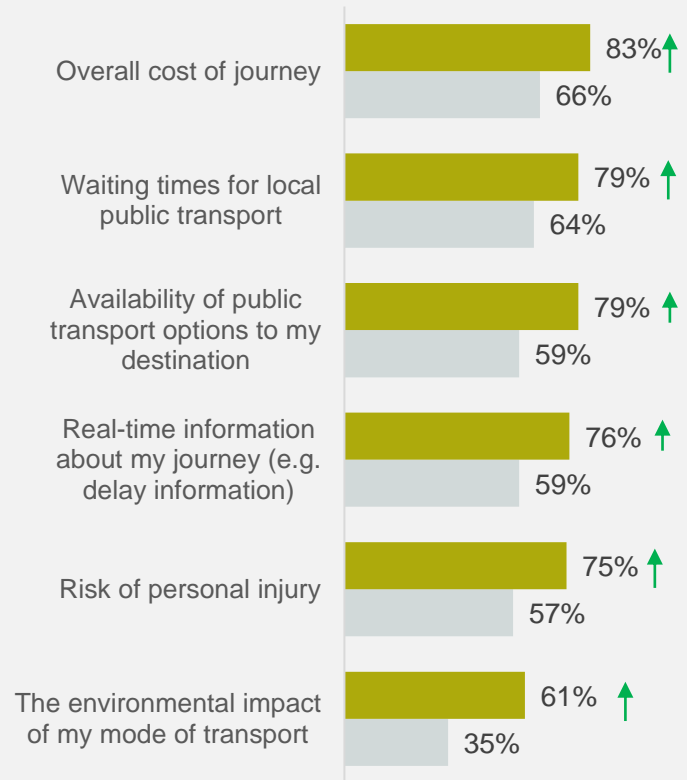
■ Sustainable Urbanites

■ Total

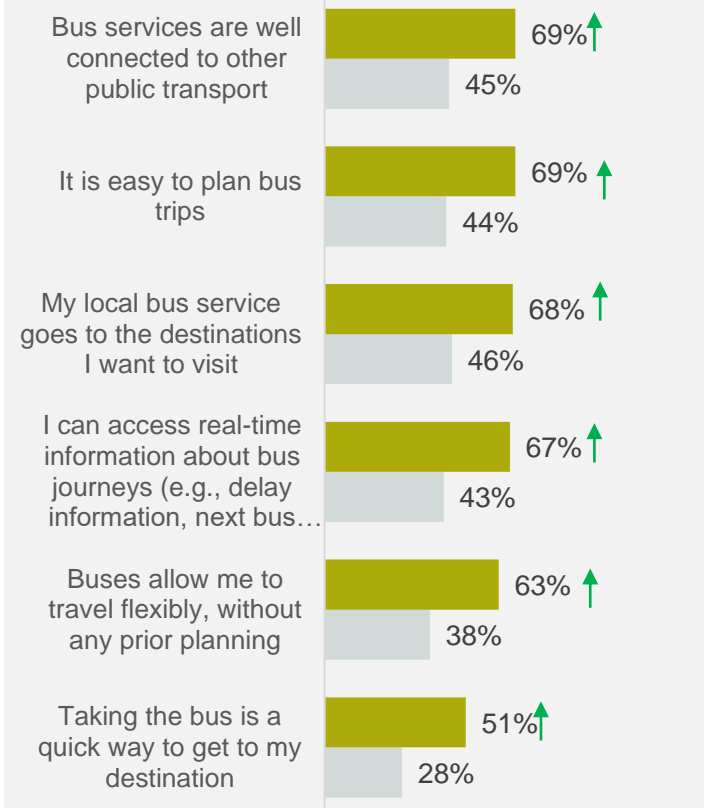
↑ Significant at 95% confidence vs Nat-Rep average

Defining attitudes: This identifies the key attitudes that over or under-index vs the total. By understanding where these drivers and barriers differ, you can develop tailored messages and policies that will motivate this segment to use the bus

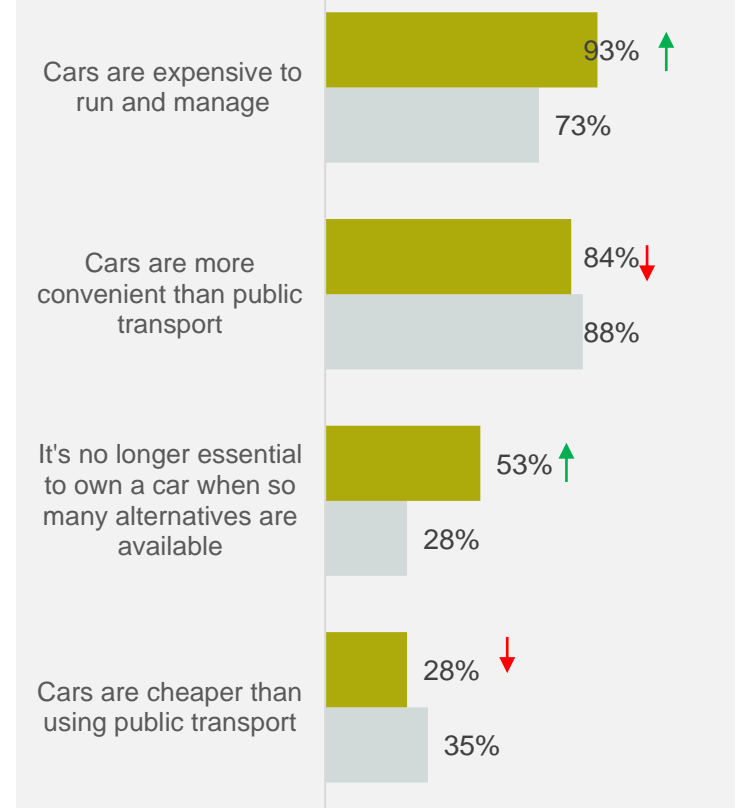
Factors important to transport choice



Attitudes towards buses



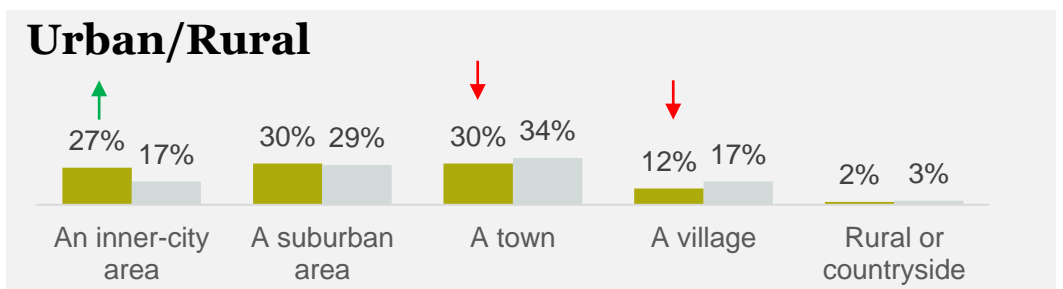
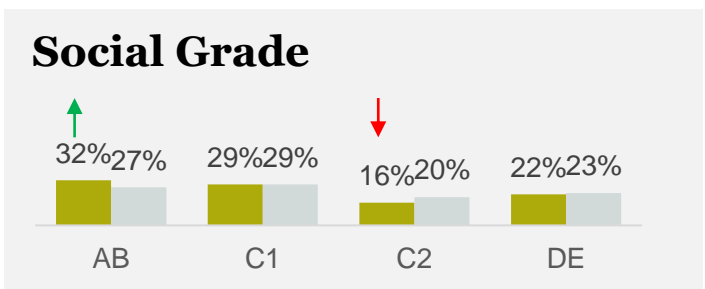
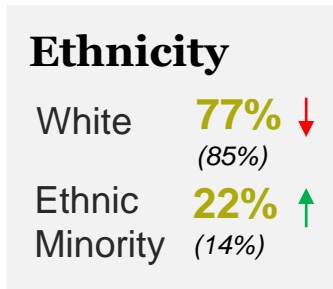
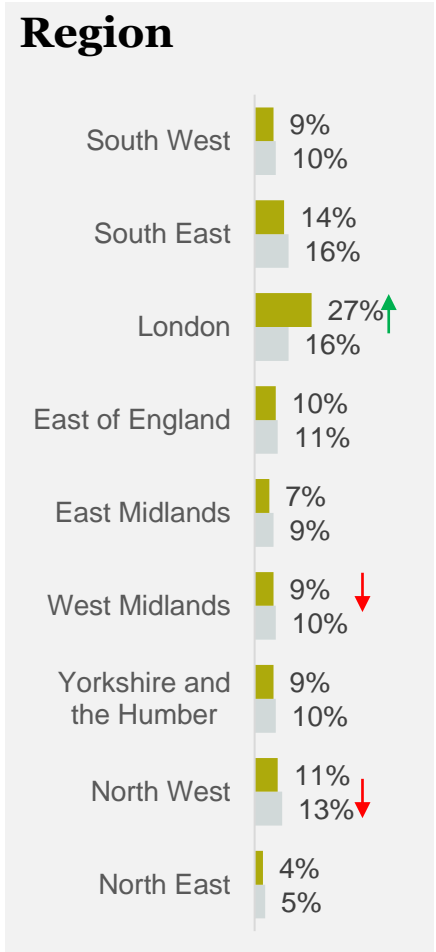
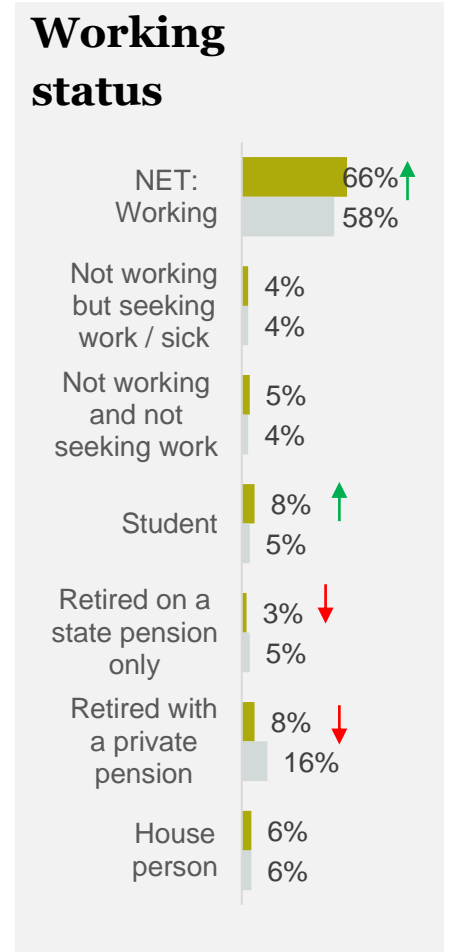
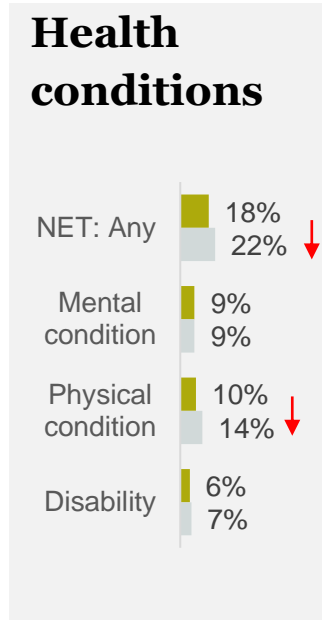
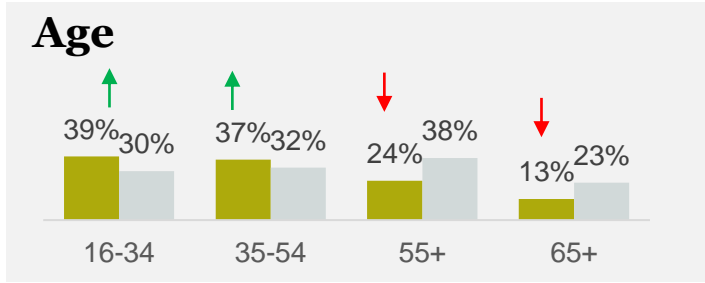
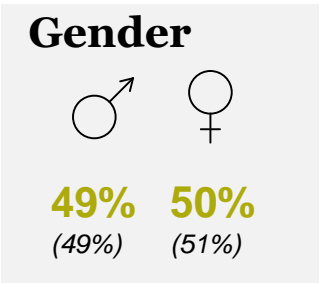
Attitudes towards cars



This segment tend to be younger, more affluent and less likely to have a health condition. They are more likely to live in cities

■ Sustainable Urbanites
■ Total
↑ Significant at 95% confidence vs Nat-Rep average
↓ Significant at 95% confidence vs Nat-Rep average

Key demographics: This shows the key demographics by segment and where they differ from the total. This can help you target this segment with precision



MODE OF TRANSPORT USED FOR TRANSPORT (AMONG THOSE THAT TAKE EACH JOURNEY TYPE)

While more likely to use the bus for each journey, many could still reduce their car usage

Total

Significant at 95% confidence vs Nat-Rep average

Current transport behaviour: This displays bus usage by journey type and competing modes to understand the extent of the challenge by journey type



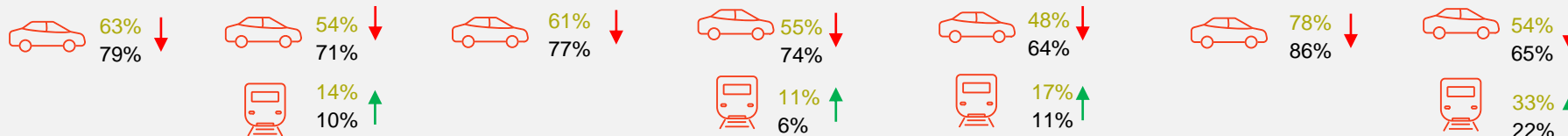
Trips ordered by frequency of journey type



Rank order of bus as mode choice

2nd 2nd 2nd 2nd 2nd 2nd 3rd

Other modes used (above 10%) incidence



Access to real time information or one's ethnic group make a stronger contribution towards propensity for this segment vs the total

Drivers of propensity to use bus: the “Change in rank order vs total” table helps identify how each factors relative contribution in driving propensity has changed vs the national average. It helps to explain where there are differences vs the national average in which factors explain why some do or do not want to use the bus

Change in rank order vs total

Factor	Percentage	Change
Taking the bus is a quick way to get to my destination	13%	==
Buses allow me to travel flexibly	12%	==
My local bus service goes to the destinations I want to visit	11%	==
It is easy to plan bus trips	9%	==
Living in London	7%	+2
(Lack of) Car ownership	5%	-1
I can rely on buses to get me to my destination on time..	5%	+1
Carrying multiple or heavy items on a bus is easy	4%	-2
Paying for the bus is simple and easy	4%	+3
I could relax on a bus journey	3%	-1
I would feel safe if I had to get a bus on my own	3%	-1
I can access real-time information about bus journeys	3%	+6
Buses are comfortable	2%	+2
Bus services are well connected to other public transport	2%	-1
I like the idea of being able to talk to others on a bus	2%	-4
There is a bus stop close to my home	2%	+1
The waiting times for buses... are too long (NET: Disagree)	2%	+3
I could get work done on a bus journey	1%	-2
..easier to catch viruses and infections on the bus (NET: Disagree)	1%	==
Ethnicity (NET: Ethnic Minority)	1%	+6
Buses are clean	1%	==
Buses are expensive (NET: Disagree)	1%	==
Getting on and off a bus would be easy	1%	+4
I could easily get on-board support from staff	1%	-1
Urban location	1%	==
..too much anti-social behaviour on buses (NET: Disagree)	1%	-2
Buses are safe on the road	0%	+1
NET: Working	0%	+3
Travelling by bus is a way to help the environment	0%	-15
Embarrassed to be seen taking a bus (NET: Disagree)	0%	-1
Buses are too overcrowded (NET: Disagree)	0%	-1

In examining the relative change in rank order of factors vs the national population, the following are more likely to explain why some want to use the bus within this segment:

- 1) Being able to access real-time information about the bus
- 2) Ethnic group (NET: Ethnic Minority)

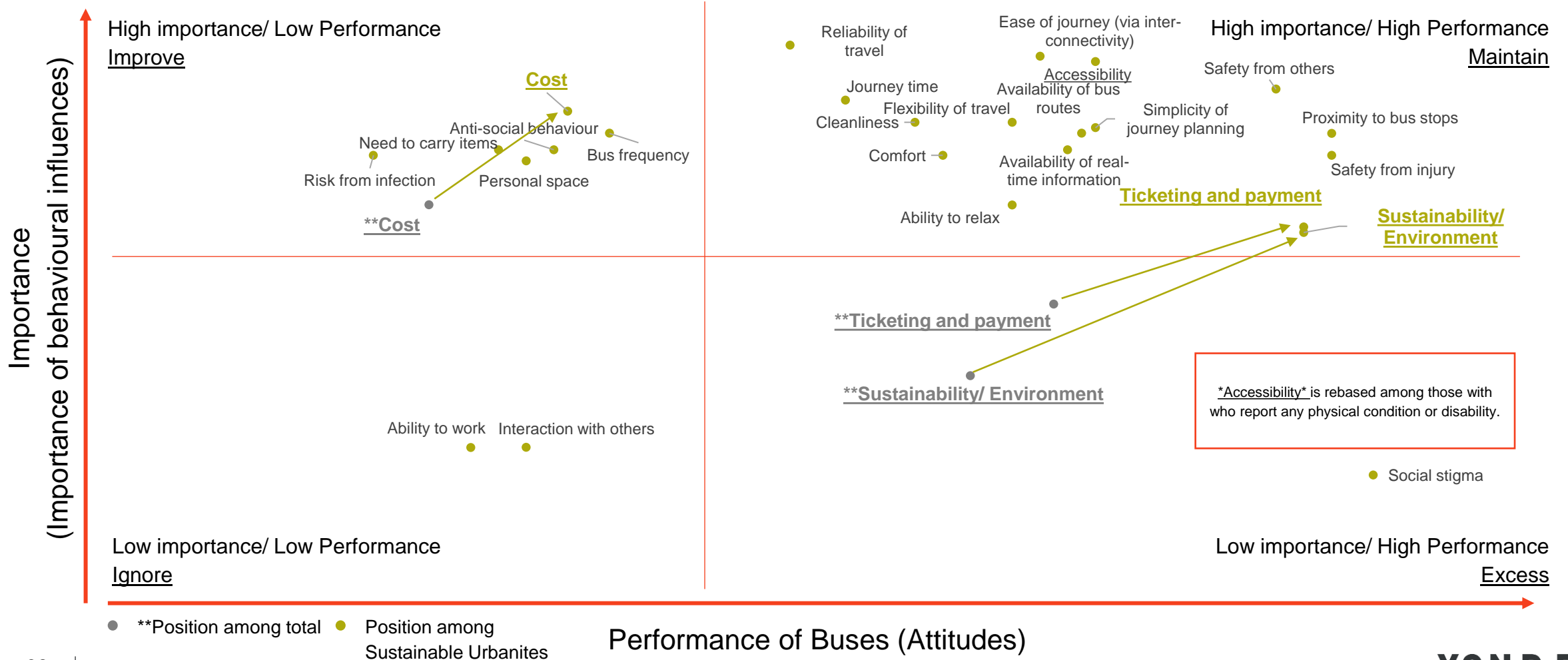
Environmental benefits have much less of a contribution to driving usage in this segment. As almost all within this segment *already* see the environmental benefits of bus transport, it does not have power to drive usage much further. This further supports a need to focus on the key drivers first – environmental benefits as seen as an added extra

The R² for this drivers analysis is **0.42**. N.B. This tells us that **42%** of the variability in propensity to use the bus is explained by the factors input to the regression model above.

Q3. Which of the following describes where you live? Q16. To what extent do you agree or disagree with the following statements regarding buses in your local area? Q21. How many cars do you have in your household? Base: Sustainable Urbanites (1482)

Cost, ticketing and payment, sustainability and the environment have all become more important to this segment vs the nation

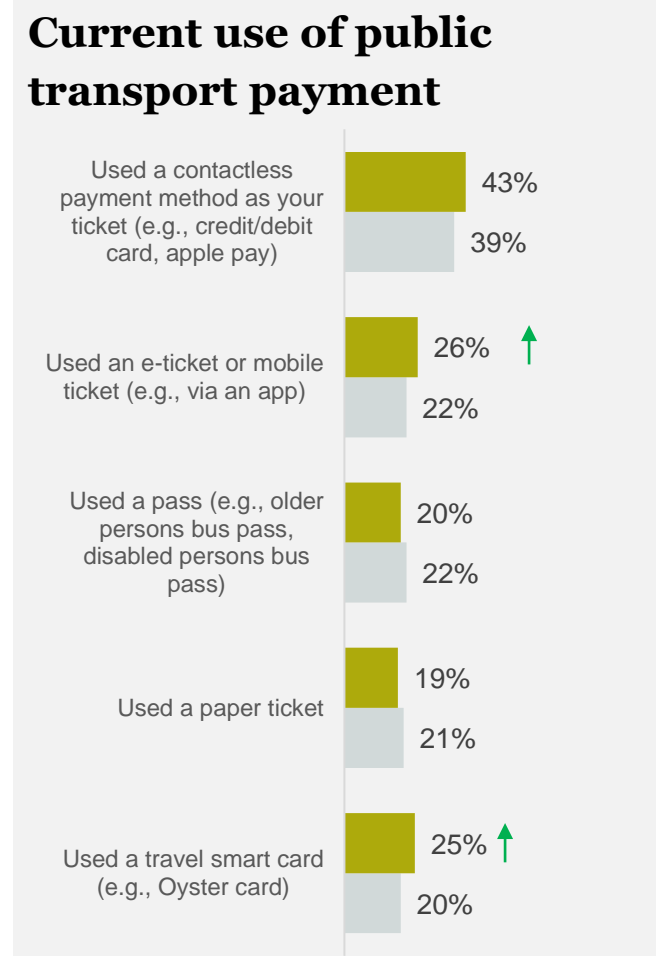
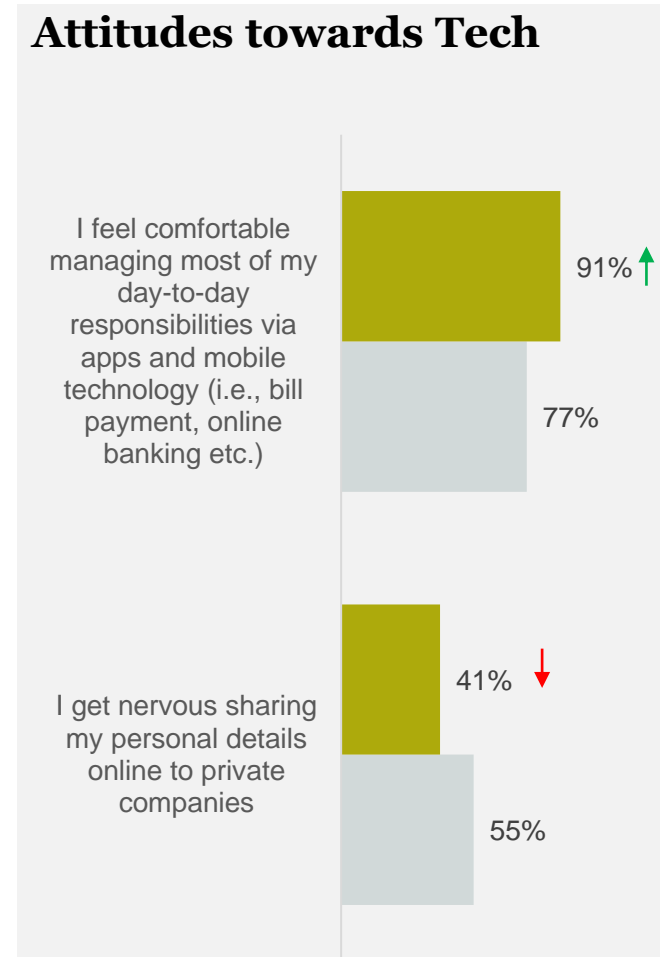
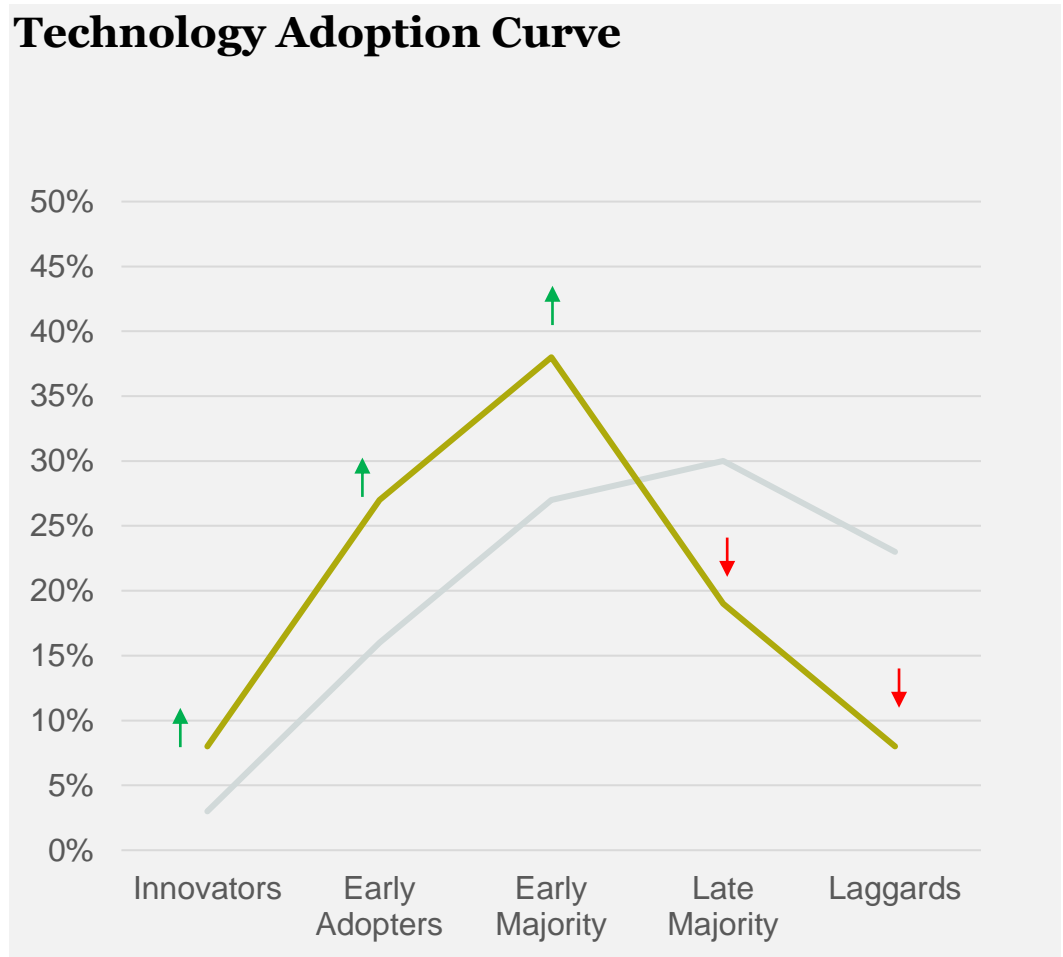
Prioritisation map: This map helps to prioritise areas to develop policies and messages. It identifies how important factors are at driving transport decisions *in general* (Y axis), and how bus is performing on those factors (X axis). Significant movements vs the total are displayed here



N.B. The axis boundaries are determined by the (national) average score for factors tested at Q13 and Q16.
 Q13. When choosing what form of transport you will take for a typical journey in your local area, how important or unimportant are each of the following factors? Q16. To what extent do you agree or disagree with the following statements regarding buses in your local area? Base: Sustainable Urbanites (1482), With Physical disabilities (178)

This segment's high levels of tech adoption demonstrate they would be comfortable using e-solutions

Attitudes towards technology: This indicates how comfortable and open this segment is towards technology and can be used to infer how open they would be to technological innovations in transport



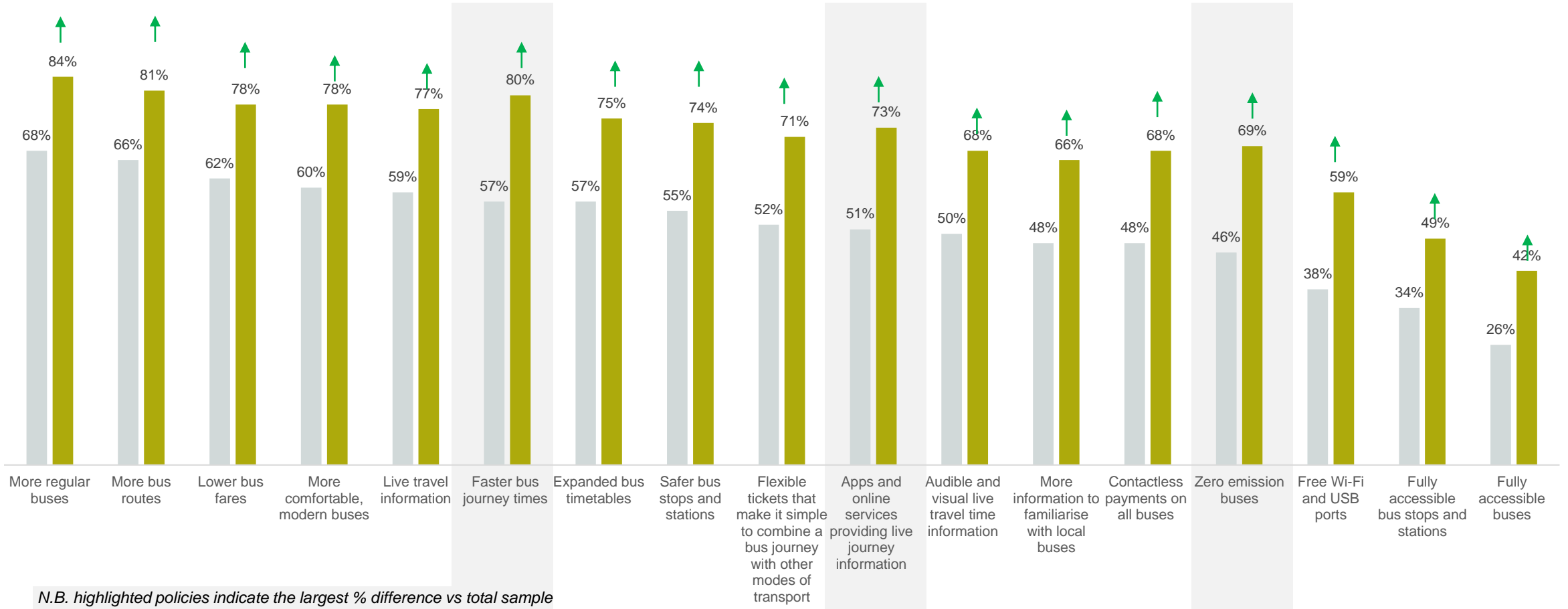
MOTIVATING POLICIES (NET A LOT/ A LITTLE MORE LIKELY TO USE THE BUS IN THE FUTURE)

All proposed policies will resonate with this segment, especially zero emission buses, faster journey times and apps

■ Total

↑ Significant at 95% confidence vs Nat-Rep average

Impact of policies: This shows which policies this segment claim would make them more likely to use the bus in the future. It can be used to prioritise short-term solutions, and indicate which policies are more relevant to certain segments



N.B. highlighted policies indicate the largest % difference vs total sample

■ Total ■ Sustainable Urbanites

Sustainable Urbanites: Strategic Summary

Short Term Target

Who to speak to

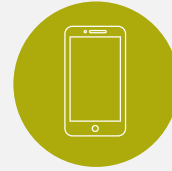
- Younger (<54)
- Primarily city/ suburban
- In full-time work or studying

Targeted ways to engage audience

This segment already has a good opinion of buses. Aside from meeting the fundamental needs develop policies and messages that speak to:



Cost benefits over car



Tech to allay concerns over reliability, journey time, and frequency



Environmental benefits

Challenges

1

Would be open to environmentally and city friendly alternatives to cars (bikes, scooters). Can buses integrate with these modes?

2

Need cost efficient and fast transport. For those outside of city areas, can infrastructure meet their needs?



Pragmatic Professionals

Pragmatic Professionals Personified



Meet Krish . . .

He lives on the outskirts of a large town with his wife and young family. He values his time and likes to maximise his use of it.

Krish drives a lot with work and being a taxi for his kids - and likes the reliability and convenience of it. But he's also happy to ditch the car for public transport when he can. He likes the train as it's direct, straight into town for him and he's happy to call an Uber.

He doesn't mind the bus too when it's going in his direction, even enjoys it when it's running well and he's on one with the free Wi-Fi and phone charger, so he can keep busy. But he's aware of the pitfalls - he hates the delays, the unreliability, the not knowing, the idea of multiple changes and wishes it was just easier to find and keep track of your bus info. So, when he does use it, it tends to be only for familiar routes he knows.

“

“The bus is a lottery - sometimes it's pleasant, on time and others it's running late and I'm anxious, stressed and bored all in one” Pragmatic Professionals

“Just finding out the best bus to take can be stressful - it takes so long, complicated” Pragmatic Professionals

*If the bus were an animal, he'd say...
“A tortoise... Very slow, stops often...
But unlike the tortoise and the hare the bus never wins”* Pragmatic Professionals

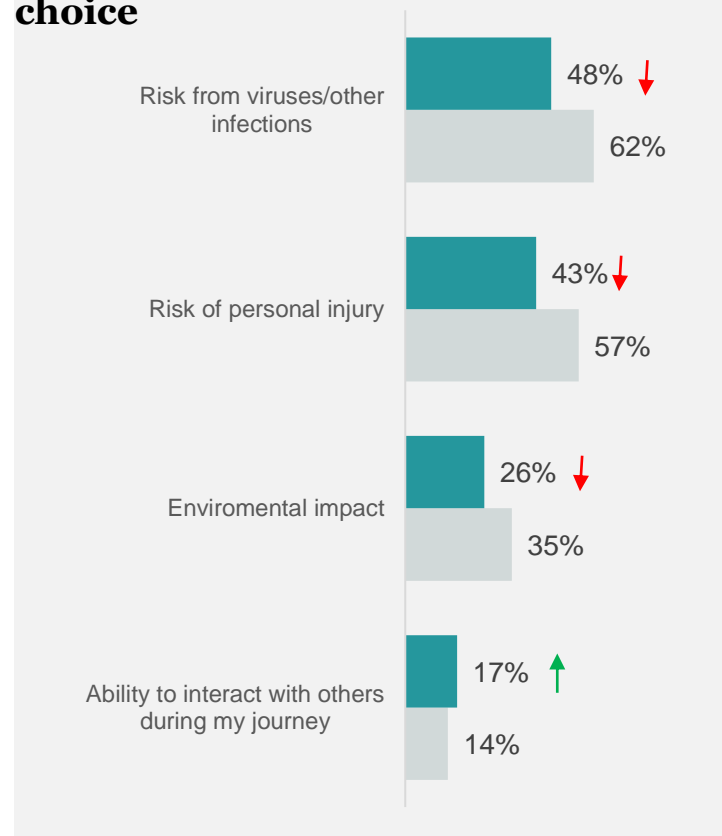
”

This segment are defined by lower concerns towards safety and the environment. They have broadly positive attitudes towards the bus. Yet, many feel cars are cheaper than public transport

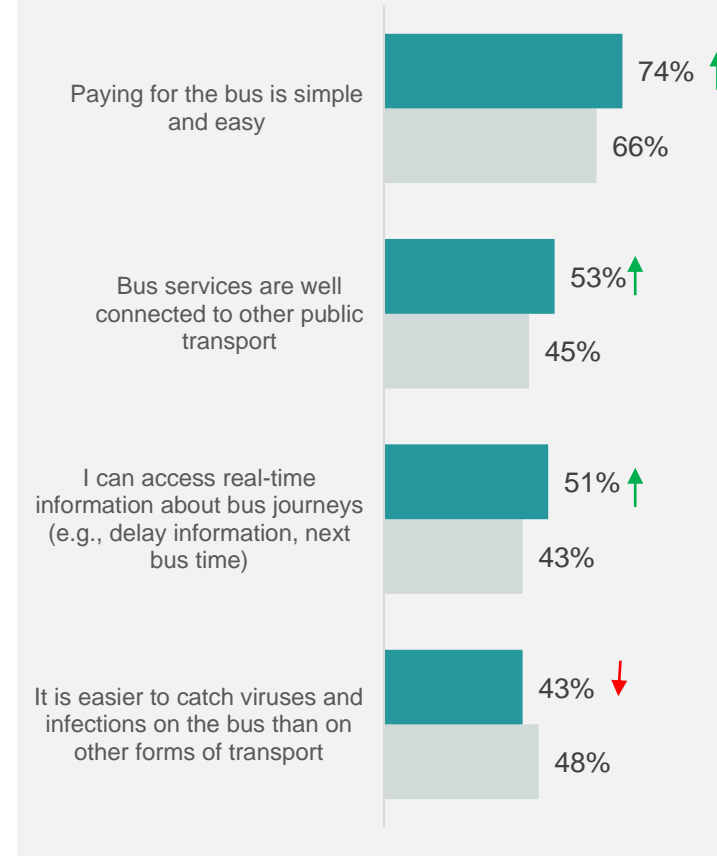
■ Pragmatic Professionals
■ Total
↑ Significant at 95% confidence vs Nat-Rep average

Defining attitudes: This identifies the key attitudes that over or under-index vs the total. By understanding where these drivers and barriers differ, you can develop tailored messages and policies that will motivate this segment to use the bus

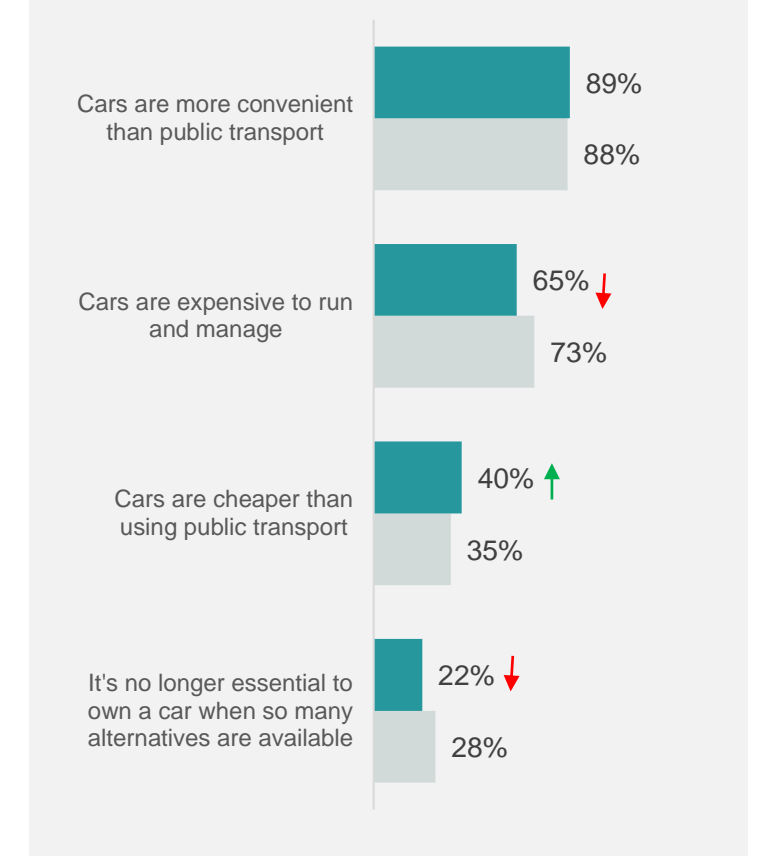
Factors important to transport choice



Attitudes towards bus



Attitudes towards car



They are typically male, younger and professional class workers. They are well distributed across the nation

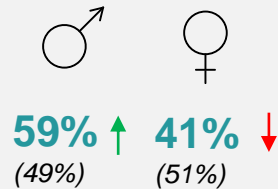
■ Pragmatic Professionals

■ Total

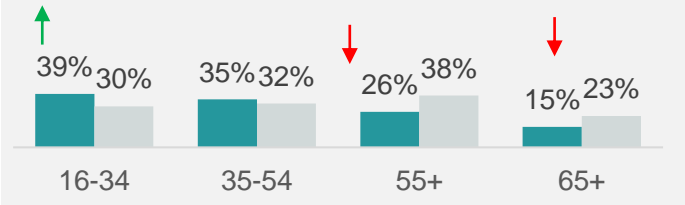
↑ Significant at 95% confidence vs Nat-Rep average
↓ Significant at 95% confidence vs Nat-Rep average

Key demographics: This shows the key demographics by segment and where they differ from the total. This can help you target this segment with precision

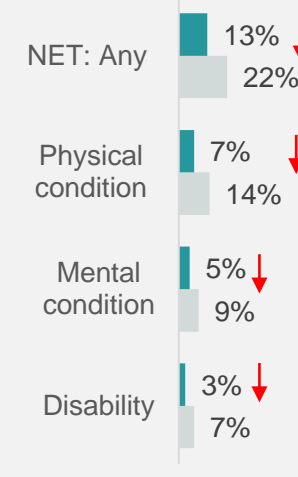
Gender



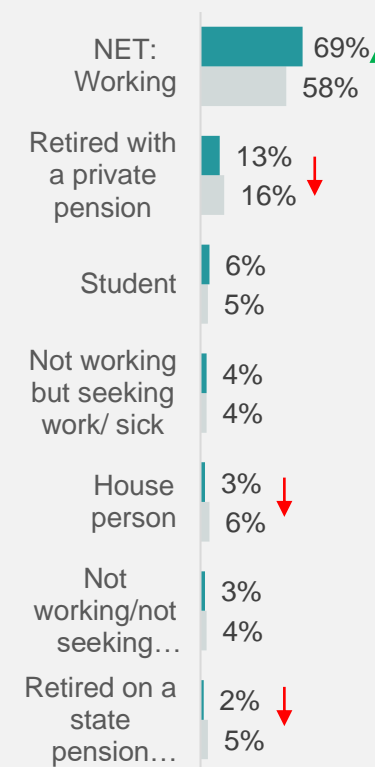
Age



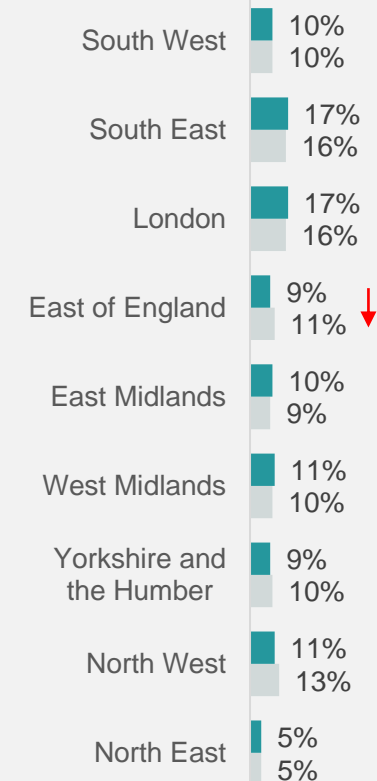
Health conditions



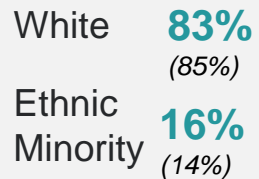
Working status



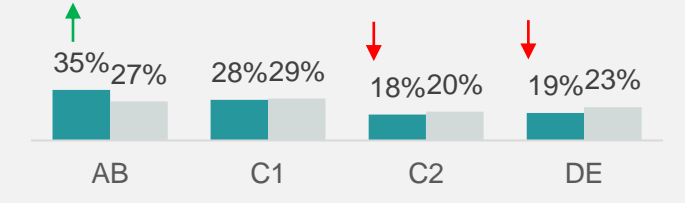
Region



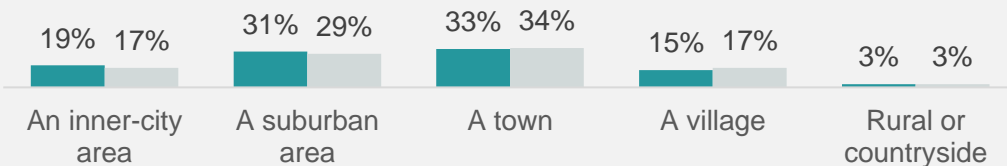
Ethnicity



Social Grade



Urban/Rural



Average income

£40,630 ↑
(£34,580)

MODE OF TRANSPORT USED FOR TRANSPORT (AMONG THOSE THAT TAKE EACH JOURNEY TYPE)

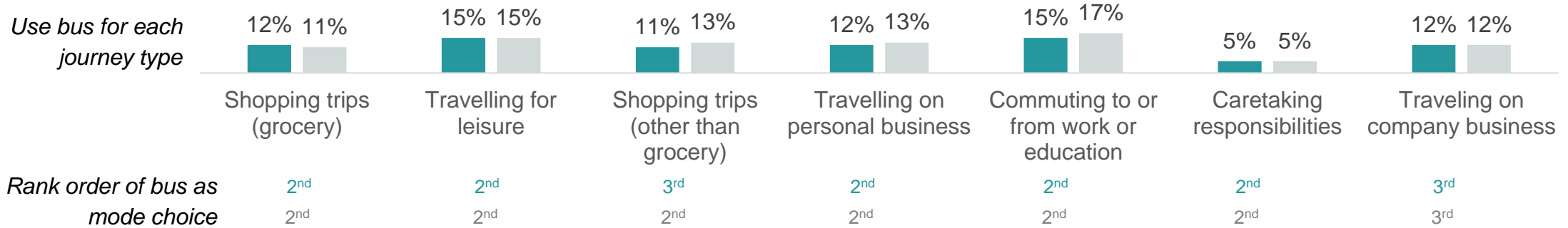
This segment still has a strong preference for car for most trips, in particular grocery and business

■ Pragmatic Professionals
■ Total

Current transport behaviour: This displays bus usage by journey type and competing modes to understand the extent of the challenge by journey type



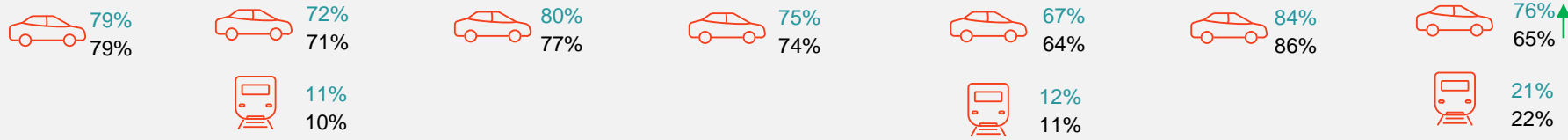
Trips ordered by frequency of journey type



Rank order of bus as mode choice

Shopping trips (grocery)	Travelling for leisure	Shopping trips (other than grocery)	Travelling on personal business	Commuting to or from work or education	Caretaking responsibilities	Traveling on company business
2 nd	2 nd	3 rd	2 nd	2 nd	2 nd	3 rd
2 nd	2 nd	2 nd	2 nd	2 nd	2 nd	3 rd

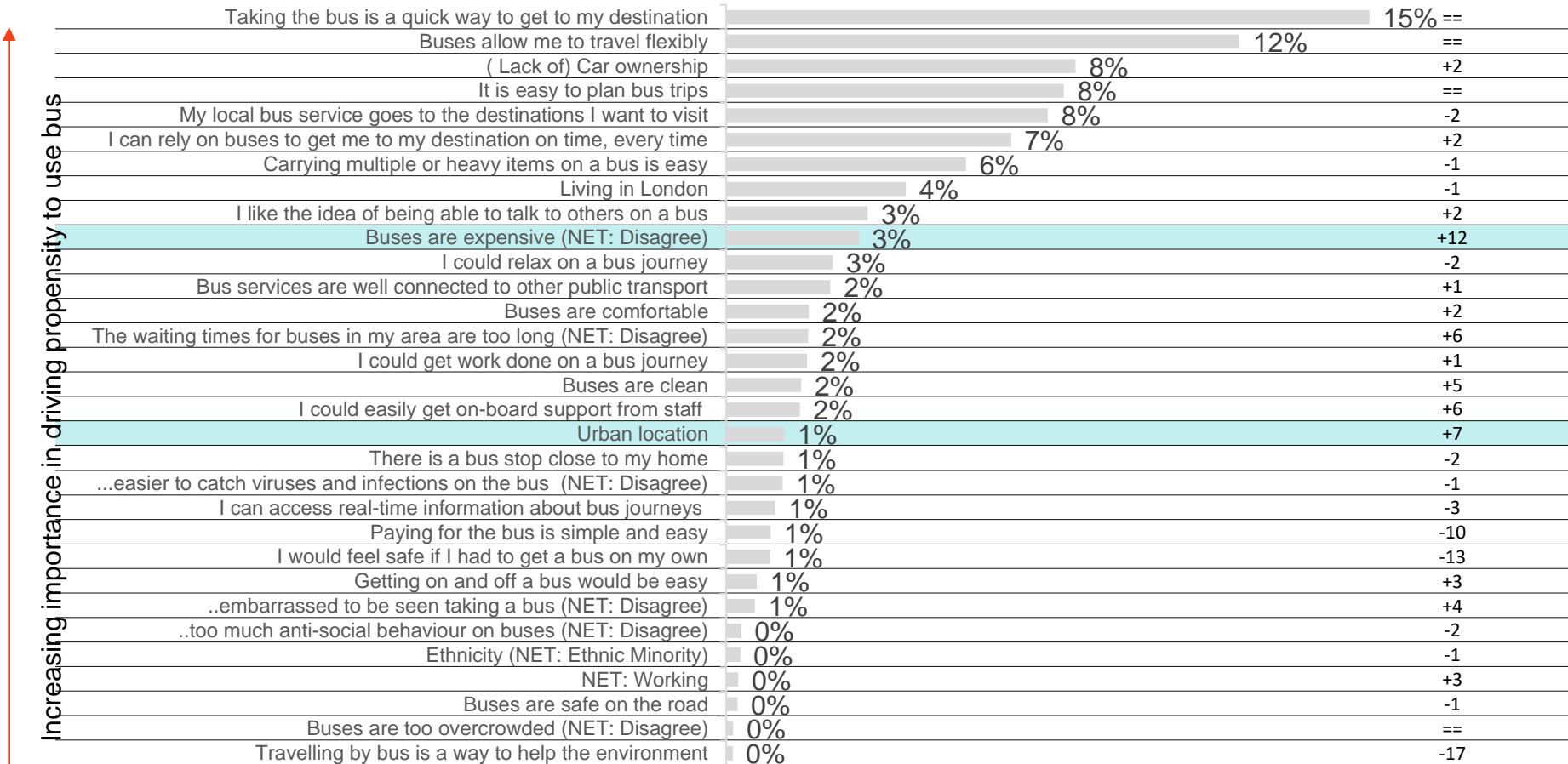
Other modes used (above 10%) incidence



The cost of the bus and living in an urban area are more likely to drive bus usage among Pragmatic Professionals vs the nation

Drivers of propensity to use bus: the “Change in rank order vs total” table helps identify how each factors relative contribution in driving propensity has changed vs the national average. It helps to explain where there are differences vs the national average in which factors explain why some do or do not want to use the bus

Change in rank order vs total



In examining the relative change in rank order of factors vs the national population, the following are more likely to explain why some want to use the bus within this segment:

- 1) A belief the bus is inexpensive
- 2) Living in an urban area

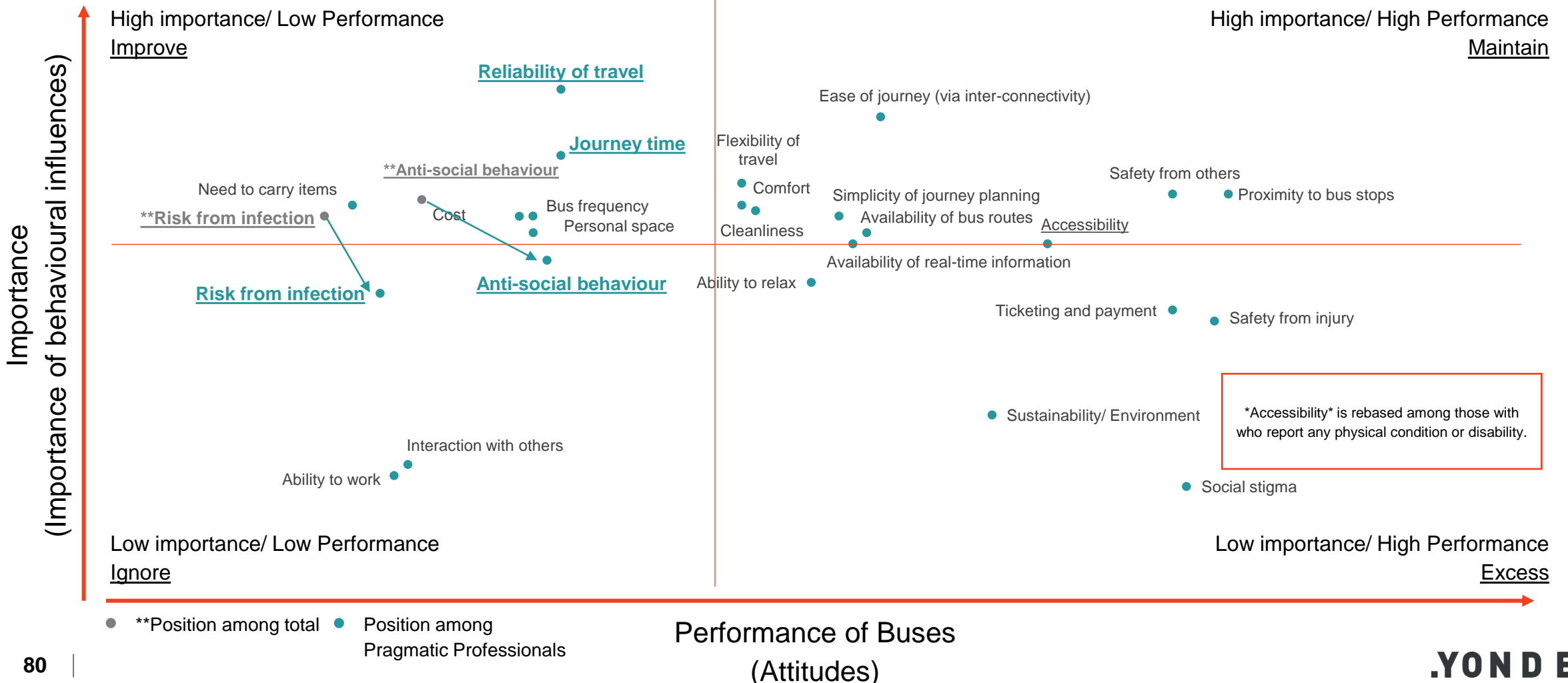
On the other hand, perceptions of safety and environmental benefits are less likely to drive bus usage for this segment vs the national population

The R² for this drivers analysis is 0.44. N.B. the R² is a model fit measure indicating how much of variation in the dependent variable is explained by the variables included in the model.

Q3. Which of the following describes where you live? Q16. To what extent do you agree or disagree with the following statements regarding buses in your local area? Q21. How many cars do you have in your household? Base: Pragmatic Professionals (1351)

Risk from infection and anti-social behaviour are less important to improve vs the national average. Reliability and journey time remain the key areas to improve

Prioritisation map: This map helps to prioritise areas to develop policies and messages. It identifies how important factors are at driving transport decisions *in general* (Y axis), and how bus is performing on those factors (X axis). Significant movements vs the total are displayed here



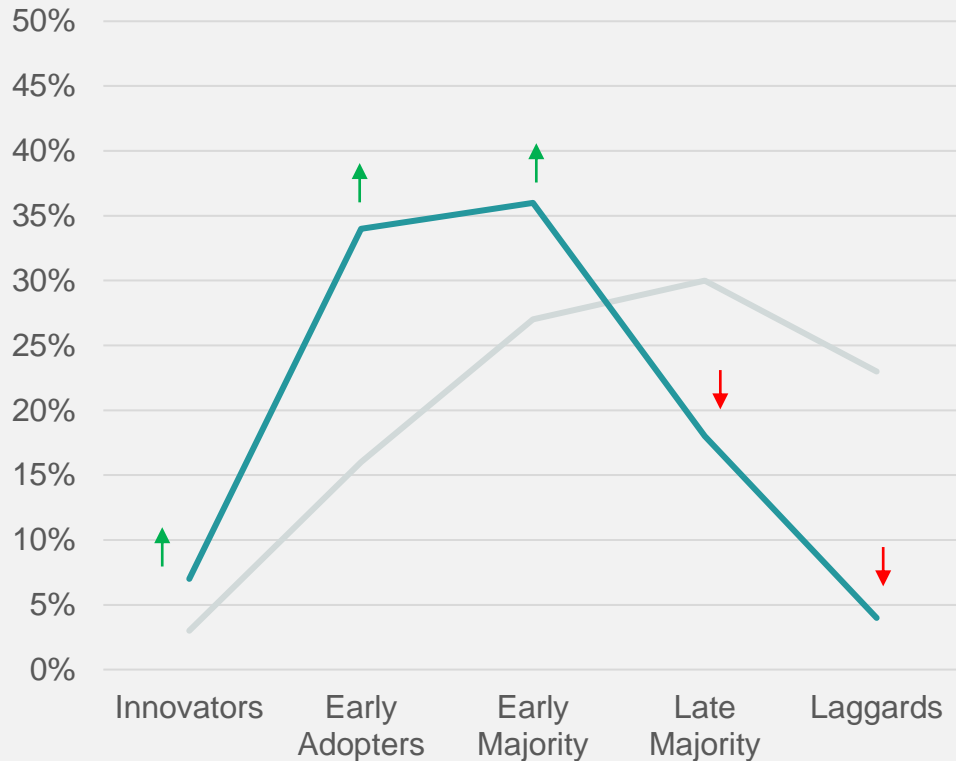
E-solutions would go down well with this early adopter segment

■ Pragmatic Professionals
■ Total

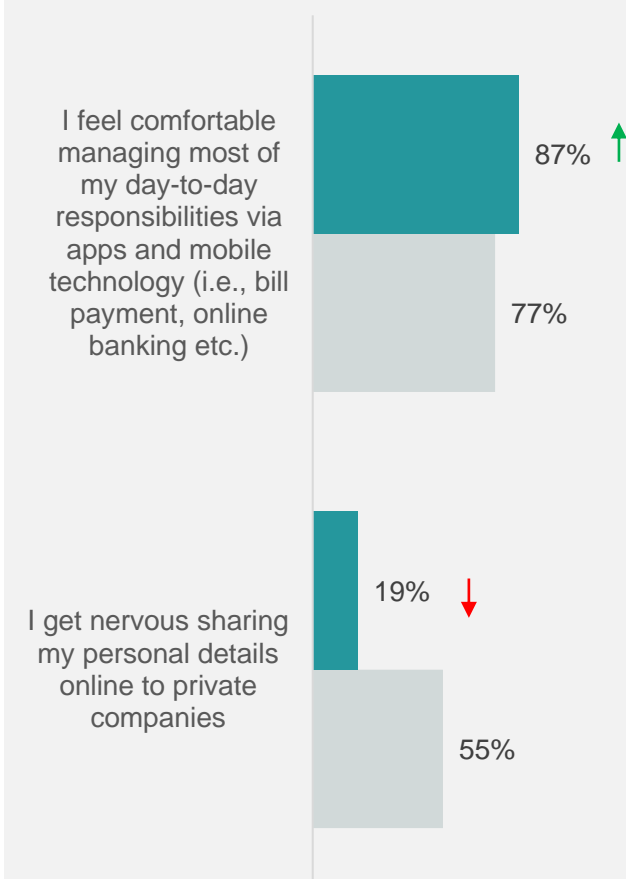
↑ ↓ Significant at 95% confidence vs Nat-Rep average

Prioritisation map: This map helps to prioritise areas to develop policies and messages. It identifies how important factors are at driving transport decisions *in general* (Y axis), and how bus is performing on those factors (X axis). Significant movements vs the total are displayed here

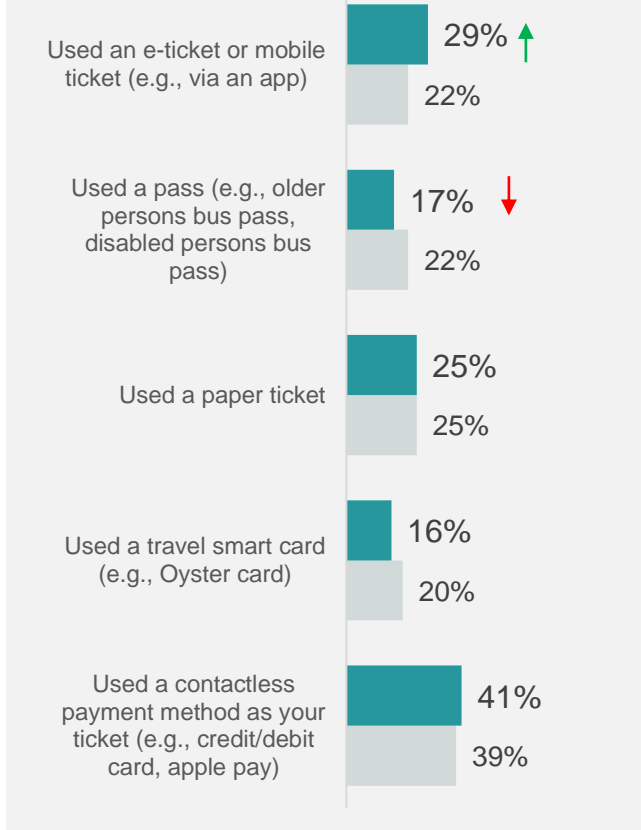
Technology Adoption Curve



Attitudes towards Tech



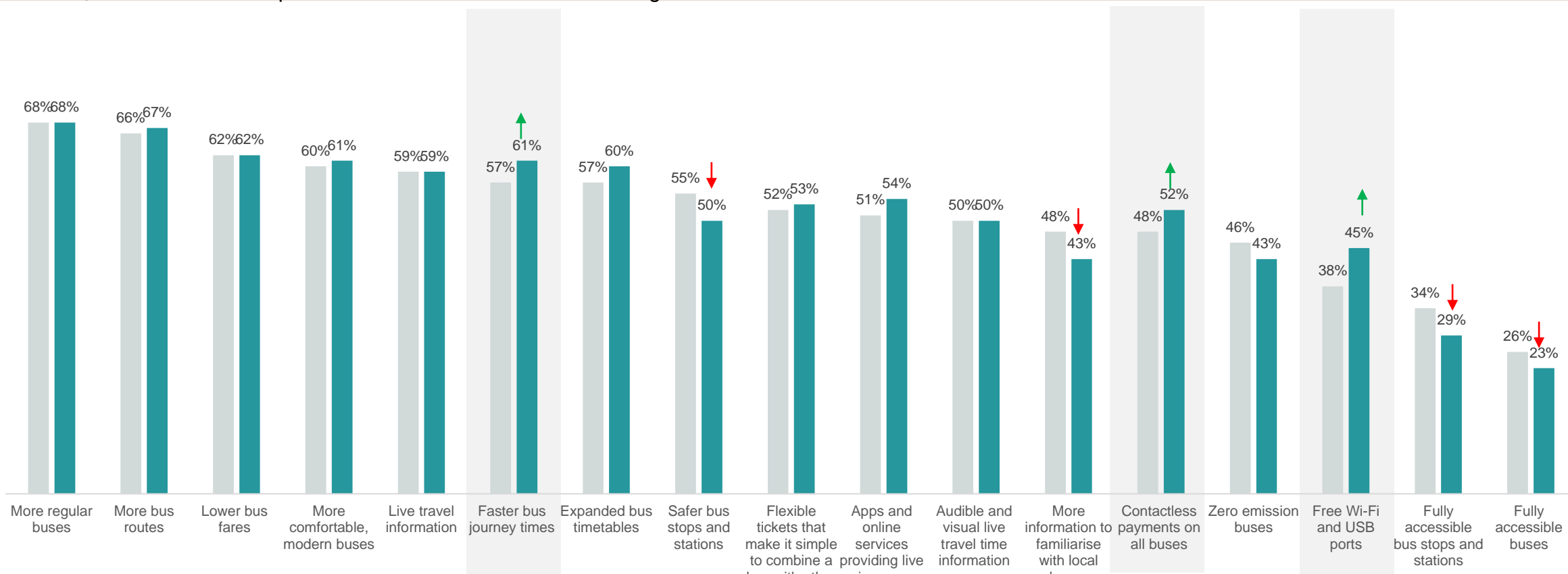
Current use of public transport payment



MOTIVATING POLICIES (NET A LOT/ A LITTLE MORE LIKELY TO USE THE BUS IN THE FUTURE)

Pragmatic Professionals are more likely to be motivated by faster buses, contactless payments and free Wi-Fi / USB ports

Impact of policies: This shows which policies this segment claim would make them more likely to use the bus in the future. It can be used to prioritise short-term solutions, and indicate which policies are more relevant to certain segments



N.B. highlighted policies indicate the largest % difference vs total sample

■ Total ■ Pragmatic Professionals

↑↓ Significant at 95% confidence vs Nat-Rep average

Pragmatic Professionals: Strategic Summary

Mid-Term Target

Who to speak to

- Younger (<54)
- Typically male
- Typically more affluent
- In full-time work

Targeted ways to engage audience

This segment does not have a negative impression of buses that needs to be overcome. However, they won't be won over by societal benefits, so any new policies and messages should talk to the personal benefits:



Speak to practical fundamental needs (reliability and speed)



Utilise tech to improve performance on these fundamental needs



Provide a more modern / productive travel experience

Challenges

1

Won't be motivated by societal benefits (e.g. environment, accessibility) or improvements to safety (risk from infection and anti-social behaviour). Need to prove a personal benefit (i.e. gets you there faster via bus lanes).

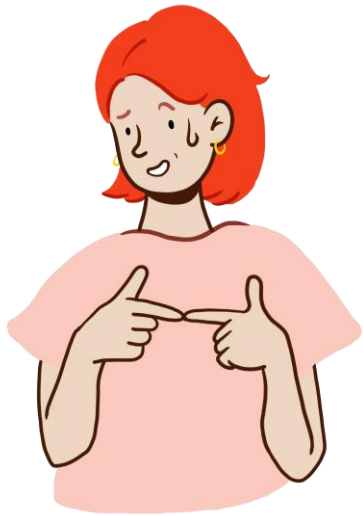
2

This segment are affluent and can afford cars. Cost saving alone is not enough to motivate, buses need to be more reliable and faster than the option of a car



Anxious Vulnerables

Anxious Vulnerables Personified



Meet Rose . . .

She lives with her husband and dog, on the outskirts of a big town. A cleaner, she juggles 4 jobs in between the supermarket runs, walking the dog and occasional meet up with friends.

Rose can find using the bus stressful and it can set her anxiety off - waiting around for the bus, trying to plan her journey particularly if she's not that familiar with a route. Her last experience didn't help - the bus went all round the houses, taking a lot longer than imagined, she worried about it being on time and getting off at the right stop, and the £5 fare felt a lot for a short distance. It also felt dirty and she stayed downstairs near the driver because she was worried about who might be upstairs.

She'd like to feel more confident using public transport though, including the bus, as it'd be good to help fight climate change and it is getting more expensive to take the car into town

“

“The thought just stresses me out. What do I do, how long will it take, will I get there on time, grumpy bus drivers and you aren't cough in public these days” Anxious Vulnerables

“Coming home at night (late) I'd rather get an Uber. You hear about trouble at night, the buses are empty . . . It makes me feel vulnerable” Anxious Vulnerables

*If the bus were an animal she'd say...
“A cow . . . Slow, big, spends too much time sat around and emits too many fumes” Anxious Vulnerables*

”

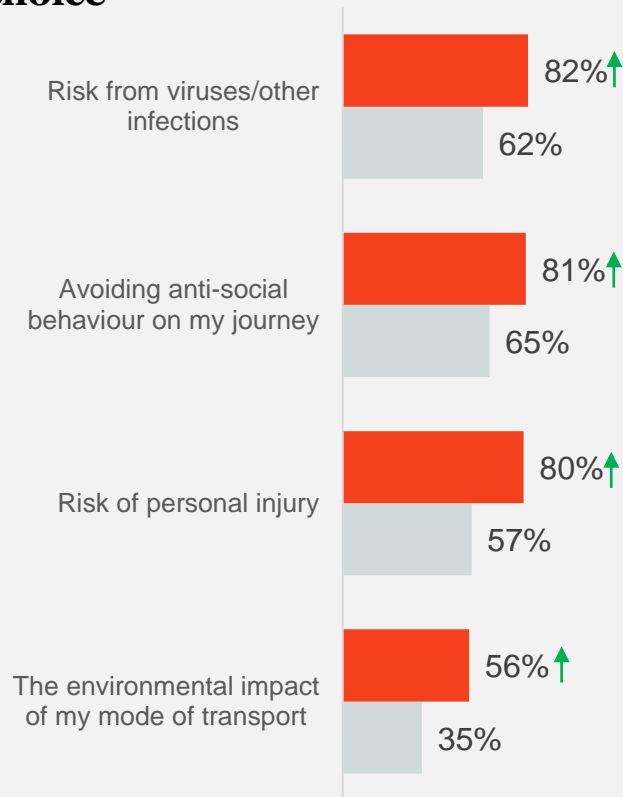
This segment are defined by their anxiety about safety and infection on the bus. They view cars as expensive, yet more convenient

Anxious Vulnerables
Total

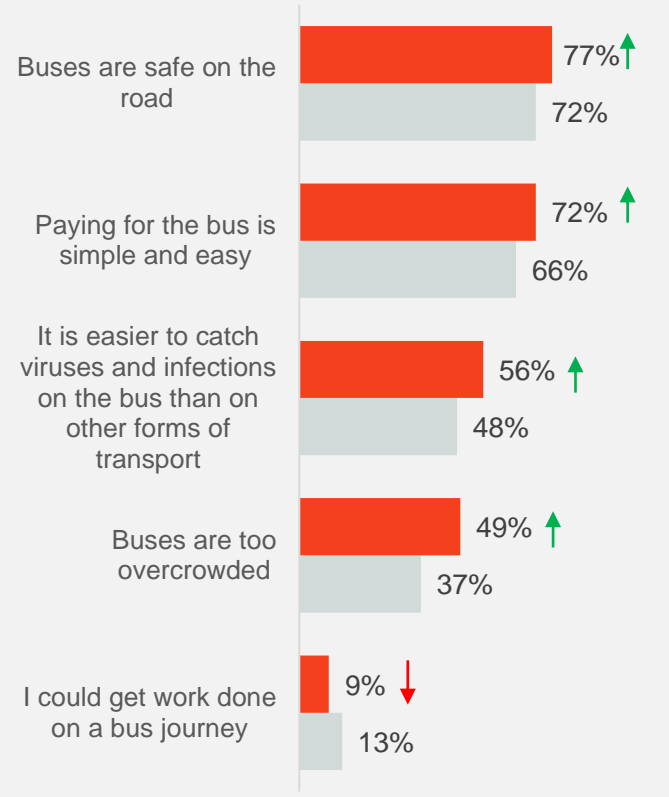
Significant at 95% confidence vs Nat-Rep average

Defining attitudes: This identifies the key attitudes that over or under-index vs the total. By understanding where these drivers and barriers differ, you can develop tailored messages and policies that will motivate this segment to use the bus

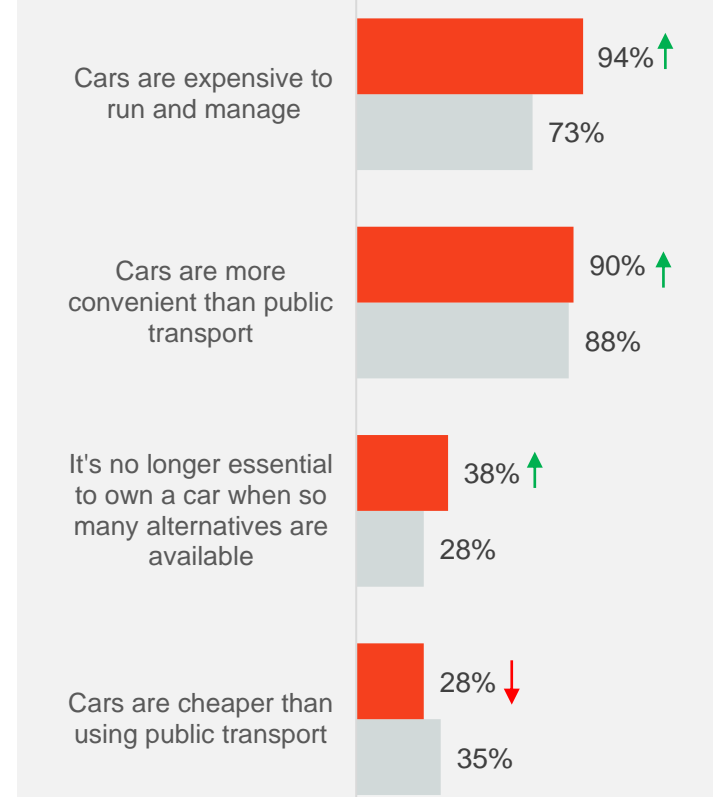
Factors important to transport choice



Attitudes towards bus



Attitudes towards car



Anxious Vulnerables are typically older, white women of lower social grades and lower income. Chronic health issues over-index among this segment

■ Anxious Vulnerables

■ Total

↓ ↑ Significant at 95% confidence vs Nat-Rep average

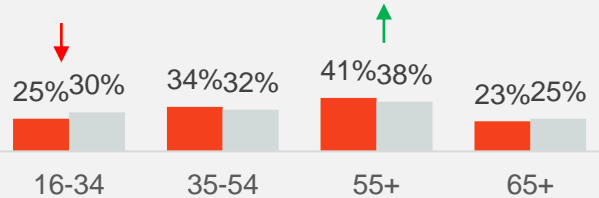
Key demographics: This shows the key demographics by segment and where they differ from the total. This can help you target this segment with precision

Gender

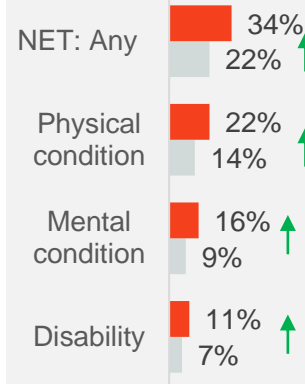


34% (49%)
65% (51%)

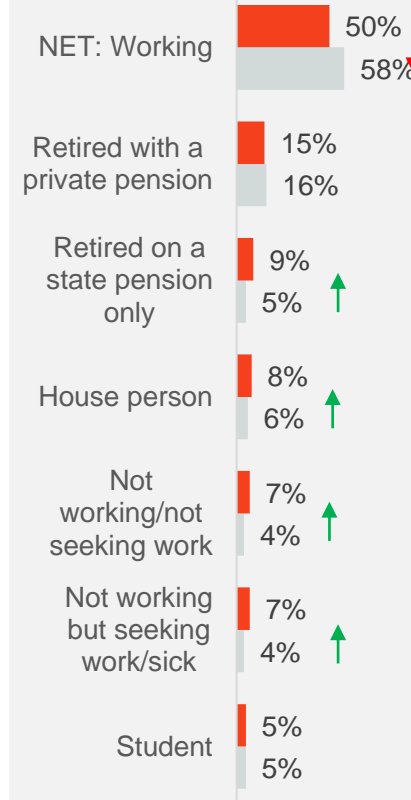
Age



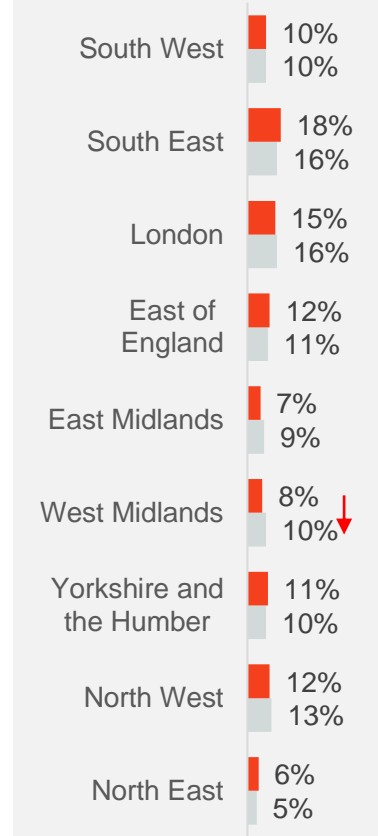
Health conditions



Working status



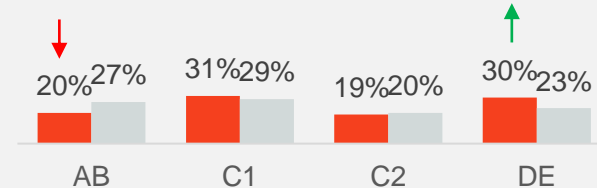
Region



Ethnicity

White **87%** (85%)
Ethnic Minority **13%** (14%)

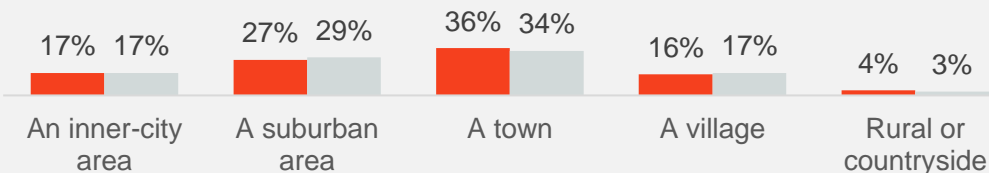
Social Grade



Average income

£27,340 (£34,580)

Urban/Rural



MODE OF TRANSPORT USED FOR TRANSPORT (AMONG THOSE THAT TAKE EACH JOURNEY TYPE)

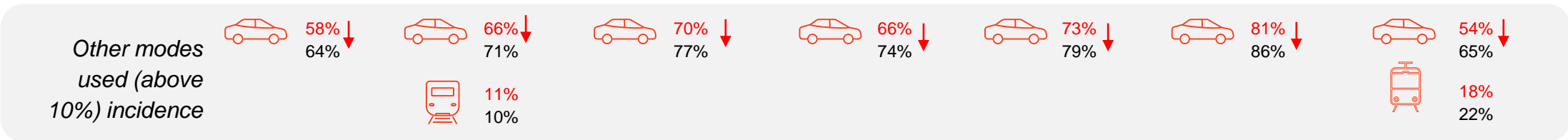
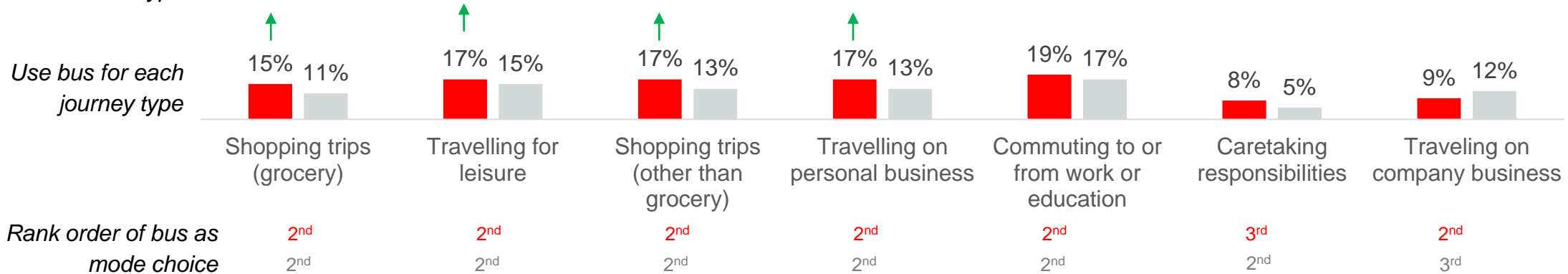
They are more likely to use buses than average for most journey types, but this could still be increased

Current transport behaviour: This displays bus usage by journey type and competing modes to understand the extent of the challenge by journey type



↓↑ Significant at 95% confidence vs Nat-Rep average

←
Trips ordered by
frequency of journey
type



Perceptions of safety in the local area, safety from viruses and cleanliness are more likely to drive propensity vs the nation

Drivers of propensity to use bus: the “Change in rank order vs total” table helps identify how each factors relative contribution in driving propensity has changed vs the national average. It helps to explain where there are differences vs the national average in which factors explain why some do or do not want to use the bus

Change in rank order vs total

Factor	Percentage	Change in rank order vs total
Taking the bus is a quick way to get to my destination	13%	==
I would feel safe if I had to get a bus on my own	8%	+8
Buses allow me to travel flexibly	8%	-1
My local bus service goes to the destinations I want to visit	7%	-1
It is easy to plan bus trips	7%	-1
(Lack of) Car ownership	6%	-1
It is easier to catch viruses and infections on the bus (NET Disagree)	5%	+12
Paying for the bus is simple and easy	4%	+4
Living in London	4%	-2
I could relax on a bus journey	4%	-1
Buses are clean	3%	+10
Travelling by bus is a way to help the environment	3%	+2
Carrying multiple or heavy items on a bus is easy	3%	-7
There is a bus stop close to my home	3%	+3
I can rely on buses to get me to my destination on time, every time	3%	-7
There is too much anti-social behaviour on buses (NET: Disagree)	2%	+8
I like the idea of being able to talk to others on a bus	2%	-6
Buses are comfortable	2%	-3
Bus services are well connected to other public transport	2%	-6
I can access real-time information about bus journeys	1%	-2
...embarrassed to be seen taking a bus (NET: Disagree)	1%	+8
.. waiting times for buses in my area are too long (NET: Dsiagree)	1%	-2
I could get work done on a bus journey	1%	-7
Getting on and off a bus would be easy	1%	+3
I could easily get on-board support from staff	1%	-2
Ethnicity (NET: Ethnic Minority)	1%	==
Buses are safe on the road	1%	+1
Buses are too overcrowded (NET: Disagree)	1%	+2
Urban location	1%	-4
Buses are expensive (NET: Disagree)	1%	-8
NET: Working	0%	==

In examining the relative change in rank order of factors vs the national population, the following are more likely to explain why some want to use the bus within this segment:

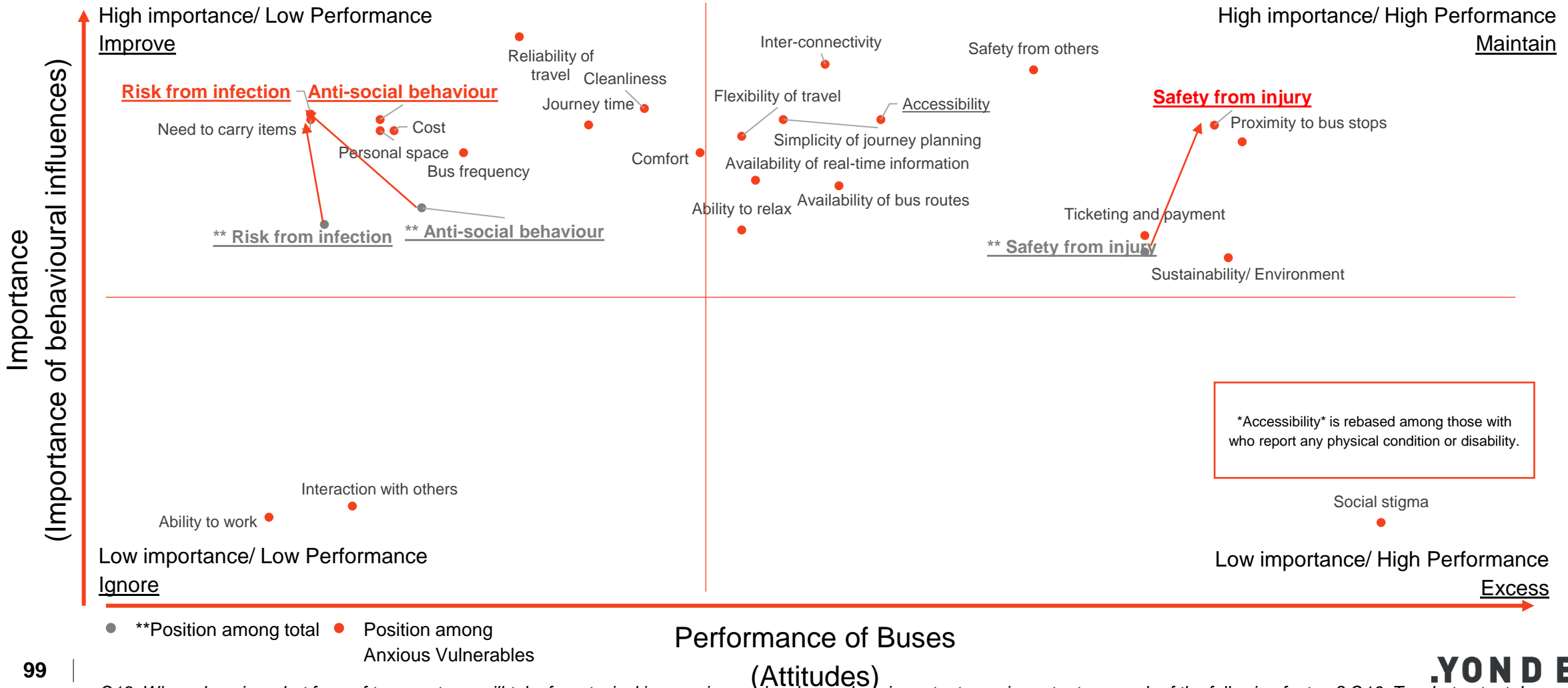
- 1) Perceptions that their bus trip will be safe for lone travelers
- 2) Confidence viral transmission is **not** easier on the bus
- 3) A belief their local bus service is clean

The R² for this drivers analysis is 0.44. N.B. This tells us that 44% of the variability in propensity to use the bus is explained by the factors input to the regression model above.

Q3. Which of the following describes where you live? Q16. To what extent do you agree or disagree with the following statements regarding buses in your local area? Q21. How many cars do you have in your household? Base: Anxious Vulnerables (1387)

Safety from injury becomes an area to maintain. Cleanliness, infection risk and anti-social behaviour become higher priorities to improve

Prioritisation map: This map helps to prioritise areas to develop policies and messages. It identifies how important factors are at driving transport decisions *in general* (Y axis), and how bus is performing on those factors (X axis). Significant movements vs the total are displayed here



This audience are more likely to be late adopters of new technology and are nervous about sharing personal details

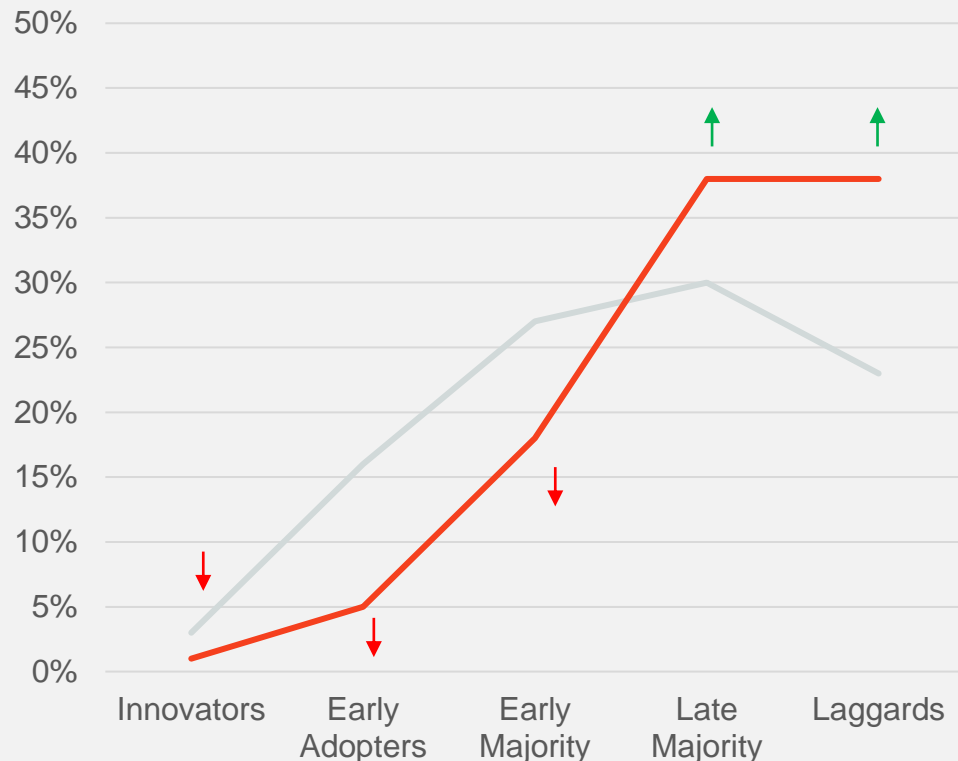
■ Anxious Vulnerables

■ Total

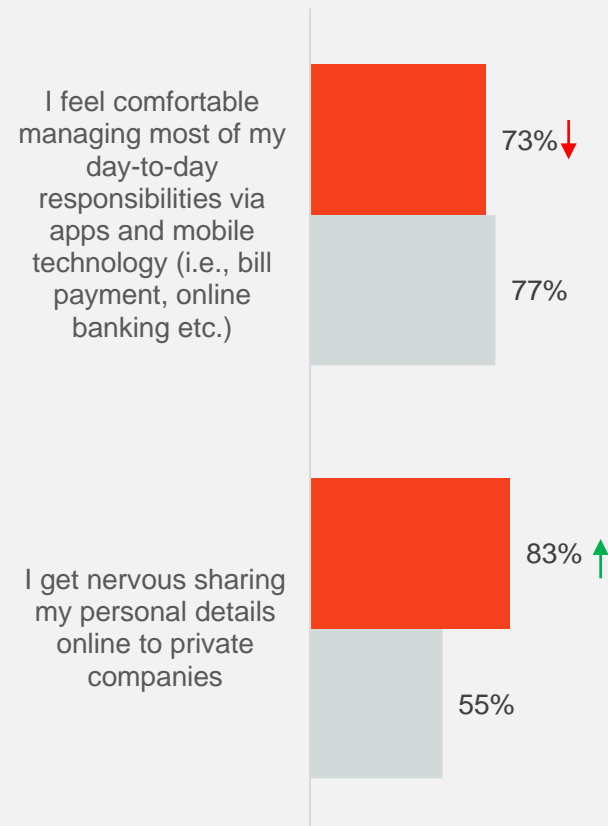
↓ ↑ Significant at 95% confidence vs Nat-Rep average

Attitudes towards technology: This indicates how comfortable and open this segment is towards technology and can be used to infer how open they would be to technological innovations in transport

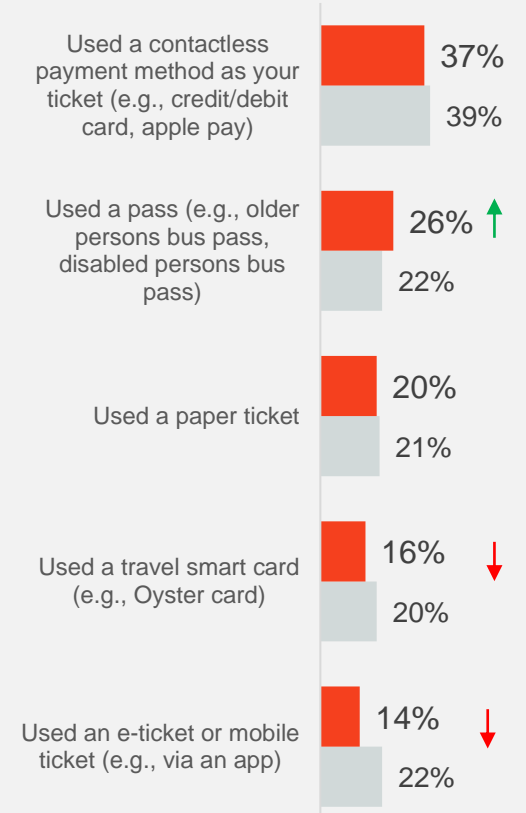
Technology Adoption Curve



Attitudes towards Tech



Current use of public transport payment



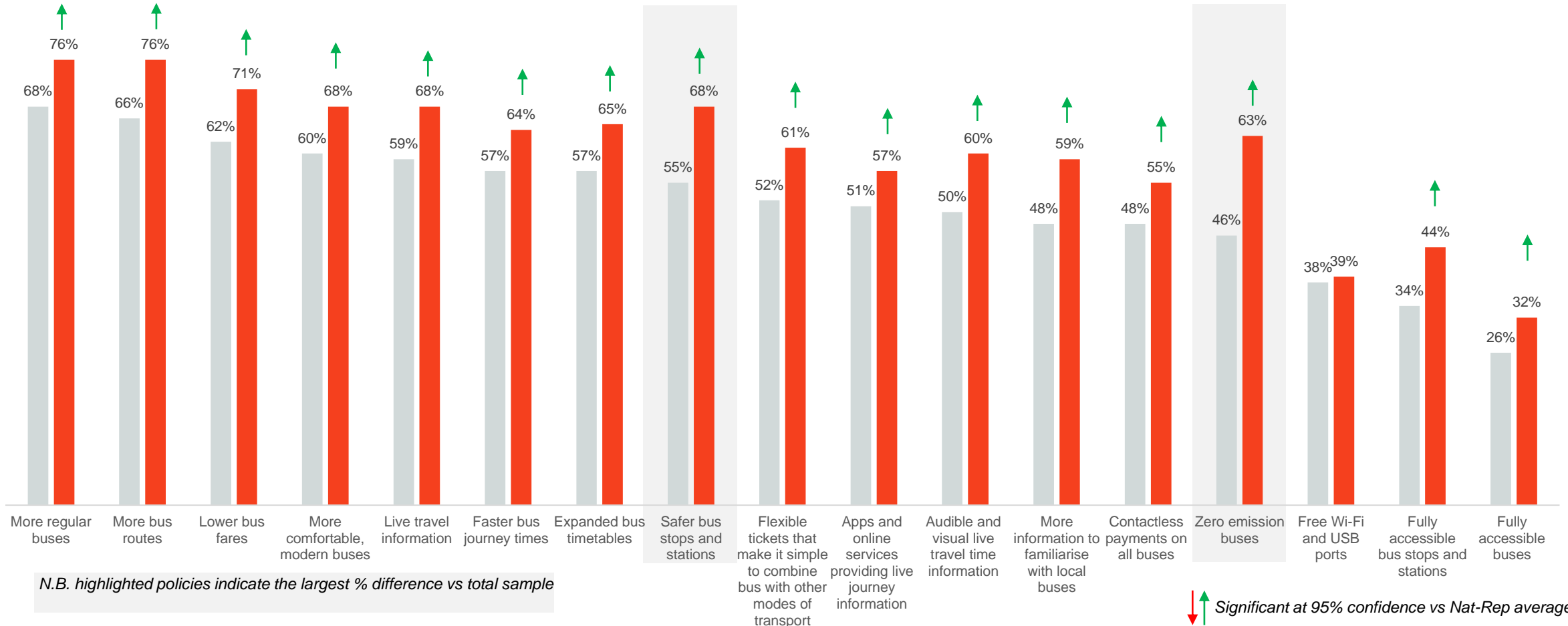
100 | Q24. We'd now like to ask you some questions about your attitudes to technology. Which of the following best describes you? Base: Total (8041), Anxious Vulnerables (1387)
 Q25. Thinking more broadly about your attitudes to technology, to what extent do you agree or disagree with each of the following? Q12. How did you pay the last time you took this journey for ...> in your local area? Base: All using public transport Total (2768) Anxious Vulnerables (491)

MOTIVATING POLICIES (NET A LOT/ A LITTLE MORE LIKELY TO USE THE BUS IN THE FUTURE)

Anxious Vulnerables are more likely than the total to be motivated by safer bus routes, and zero emission buses

Total

Impact of policies: This shows which policies this segment claim would make them more likely to use the bus in the future. It can be used to prioritise short-term solutions, and indicate which policies are more relevant to certain segments



Anxious Vulnerables: Strategic Summary

Mid-Term Target

Who to speak to

- Typically middle aged
- Typically female
- Lower income
- Often have health conditions

Targeted ways to engage audience

This segment doesn't make many trips, but due to low car ownership often must use the bus. Increasing their confidence in using the bus may help those that feel isolated. Beyond the universal hygiene factors of speed, flexibility and availability of destinations, improve perceptions and patronage of bus by developing policies or messaging that speak to:



Safety from infection



Safety from anti-social behaviour



Cost benefits over car

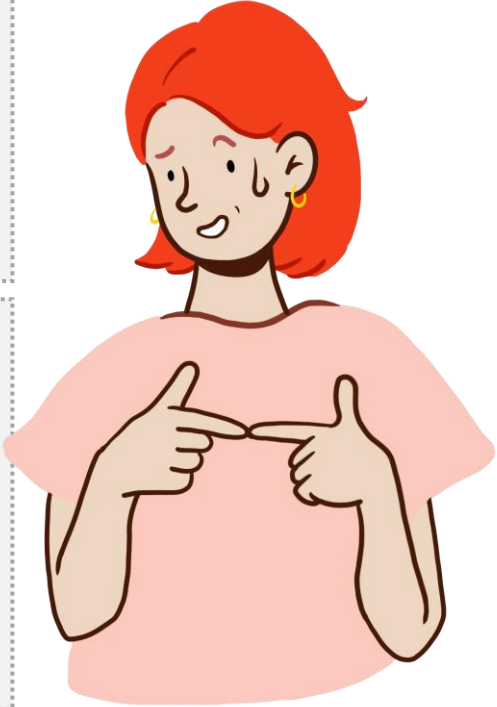
Challenges

1

Often struggle with tech. Tech solutions will require user testing for simplicity

2

High incidence of health conditions means buses may not be the safest option for them during times of high covid rates. Consider ethics of encouraging bus use at these times, and efficacy of safety measures



Open-Minded Potentials

Open-minded Potentials Personified



Meet Chris . . .

She lives near Oxford with her husband and has 3 grown up children. Apart from looking after the grandchildren, she enjoys cooking, Pilates, meeting friends in town, maybe taking in a gallery and walking the dog.

Chris uses the car most of the time - she's just got a nice new electric one which also means free parking in town. She just loves the convenience, ease and comfort. And she enjoys cycling, particularly now there are more cycle lanes. She's not averse to public transport either, but prefers the train to the bus, because it's quicker so worth the extra expense. She's also open to using the bus. She particularly likes the new modern electric ones, which look a lot cleaner and more comfortable, and she thinks they're a great introduction given climate change. But she's unsure about times, how reliable they are or even where she'd start planning a journey - so she just finds it easier to hop in the car.

“

“The issue with my local service is it's so slow to get where I want to go” Open-Minded Potentials

“Can't even begin to think about how I'd take the bus. It just feels arduous to take it . . . I want it to be a fun experience. Like you jump in the car and bam, you're there” Open-Minded Potentials

*“It's the spontaneity of the car”
Open-Minded Potentials*

*If the bus were an animal she'd say . . .
“A snail. Does what it's supposed to do but not very quick at it”
Open-Minded Potentials*

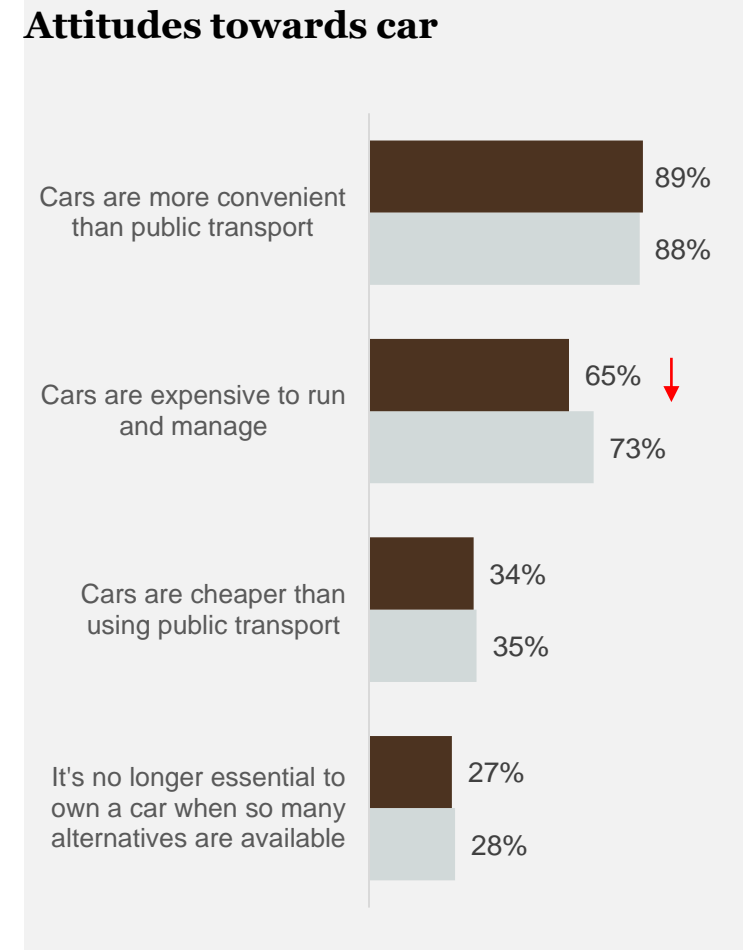
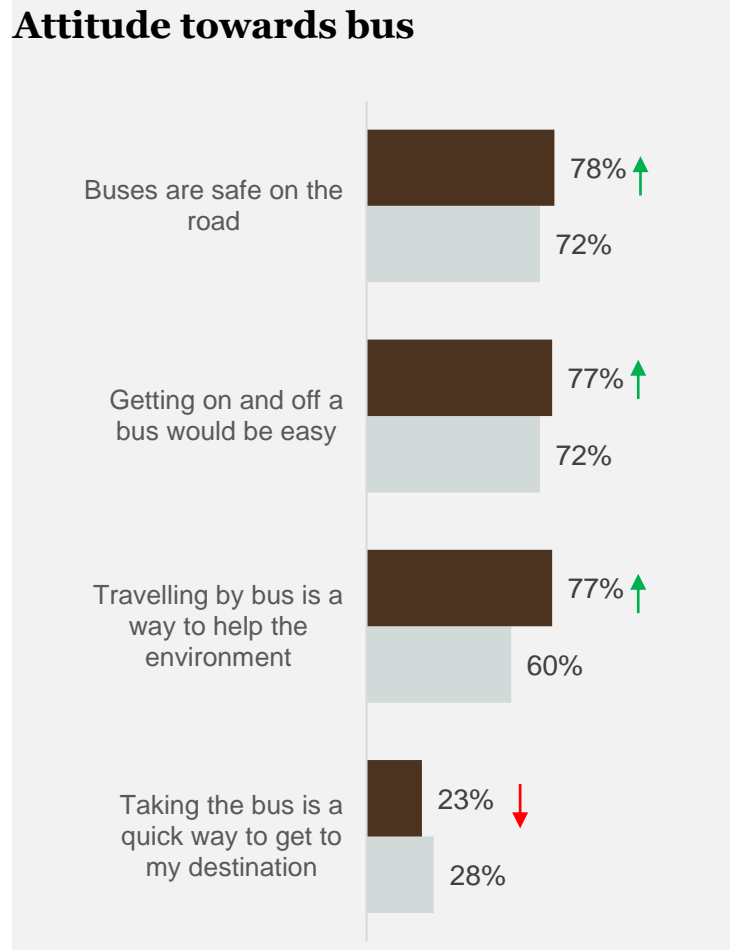
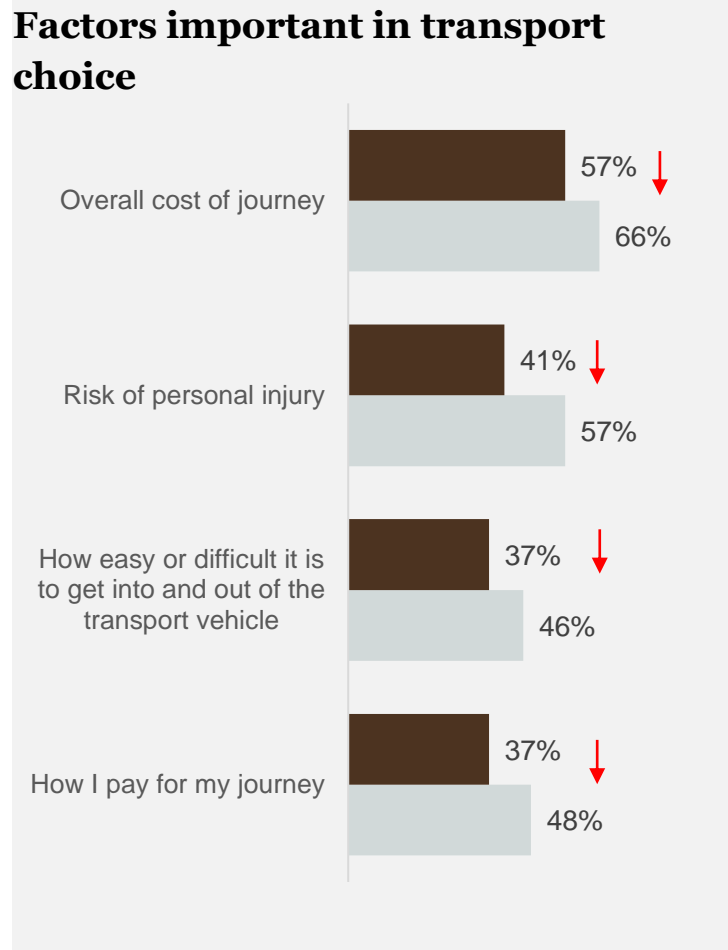
”

They are defined by lower concerns around cost and injury in transport. They view the bus as a safe, environmentally friendly mode and are less likely to see cars as expensive

■ Open-minded Potentials
■ Total

↑↓ Significant at 95% confidence vs Nat-Rep average

Defining attitudes: This identifies the key attitudes that over or under-index vs the total. By understanding where these drivers and barriers differ, you can develop tailored messages and policies that will motivate this segment to use the bus



109 | Q13. When choosing what form of transport you will take for a typical journey in your local area, how important or unimportant are each of the following factors?//Q16. To what extent do you agree or disagree with the following statements regarding buses in your local area?/Q23. We'd now like to ask you some questions about your attitudes towards cars. To what extent do you agree or disagree with each of the following? Base: Total (8041), Open-minded potentials (1448)

This segment are more likely to be rural, female, white, retirement age individuals, of a higher social grade

■ Open-minded potentials

■ Total

↑ Significant at 95% confidence vs Nat-Rep average

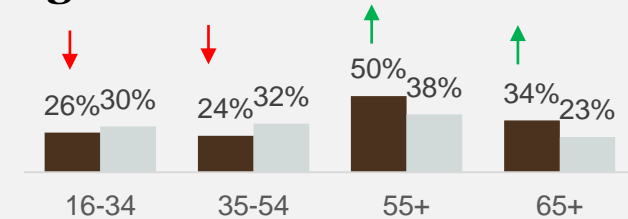
Key demographics: This shows the key demographics by segment and where they differ from the total. This can help you target this segment with precision

Gender

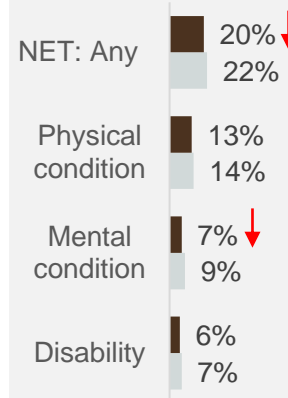


43%↓ (49%) 57%↑ (51%)

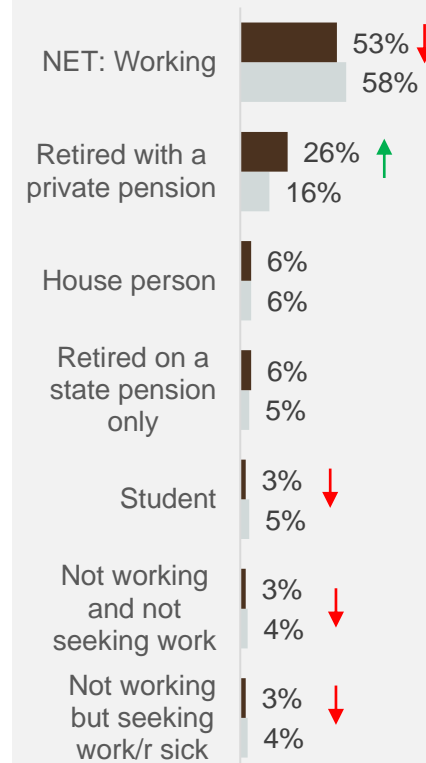
Age



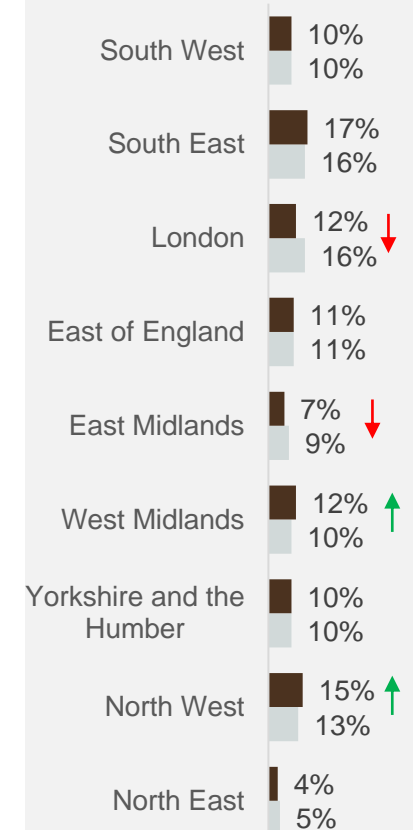
Health conditions



Working status



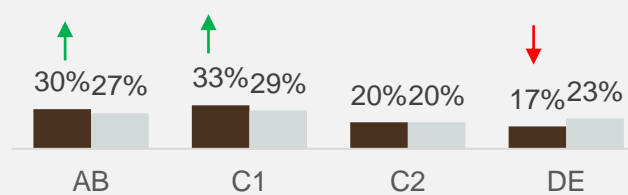
Region



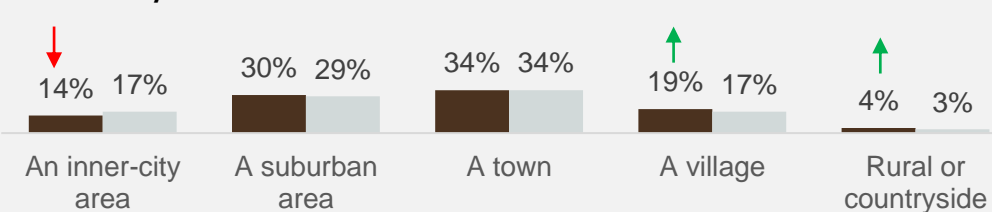
Ethnicity

White 90%↑ (85%)
Ethnic Minority 9%↓ (14%)

Social Grade



Urban/Rural



Average income

£37,060↑ (£34,580)

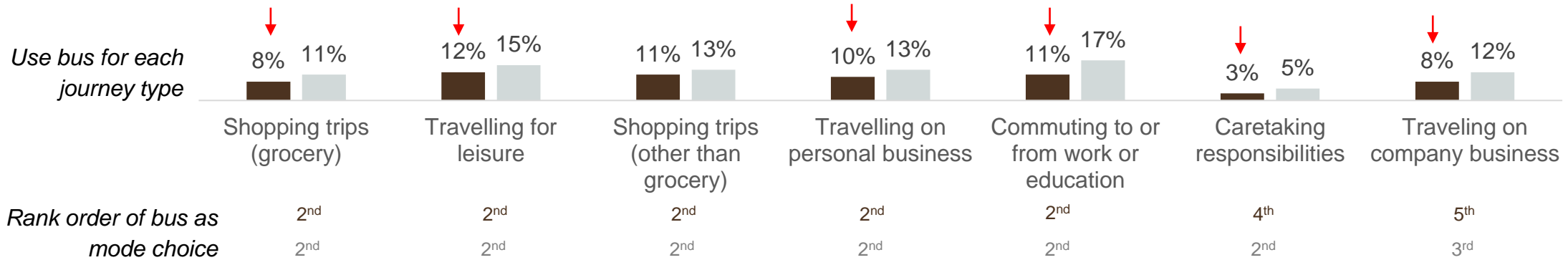
Buses are rarely used for each journey, with this segment more likely than average to use the car

Current transport behaviour: This displays bus usage by journey type and competing modes to understand the extent of the challenge by journey type



Significant at 95% confidence vs Nat-Rep average

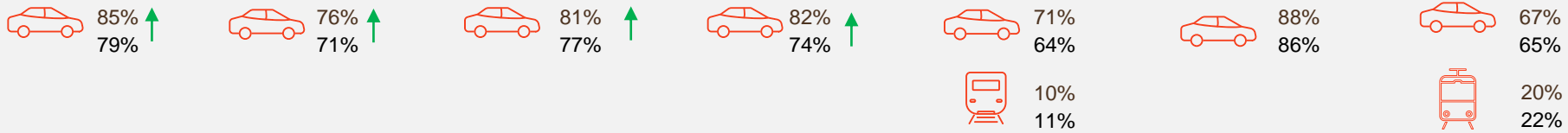
Trips ordered by frequency of journey type



Rank order of bus as mode choice

Shopping trips (grocery)	2 nd	Travelling for leisure	2 nd	Shopping trips (other than grocery)	2 nd	Travelling on personal business	2 nd	Commuting to or from work or education	2 nd	Caretaking responsibilities	4 th	Traveling on company business	5 th
	2 nd		2 nd		2 nd		2 nd		2 nd		2 nd		3 rd

Other modes used (above 10%) incidence



Current employment status, perceptions around virus transmission, and perceived cost of the bus are more likely to drive propensity vs the nation

Drivers of propensity to use bus: the “Change in rank order vs total” table helps identify how each factors relative contribution in driving propensity has changed vs the national average. It helps to explain where there are differences vs the national average in which factors explain why some do or do not want to use the bus

Change in rank order vs total

Taking the bus is a quick way to get to my destination	21%	==
Buses allow me to travel flexibly	12%	==
My local bus service goes to the destinations I want to visit	10%	==
It is easy to plan bus trips	7%	==
(Lack of) Car ownership	6%	==
I can rely on buses to get me to my destination on time, every time	4%	+2
I could relax on a bus journey	4%	+2
Living in London	3%	-1
Paying for the bus is simple and easy	3%	+3
Carrying multiple or heavy items on a bus is easy	3%	-4
It is easier to catch viruses and infections on the bus (NET: Disagree)	3%	+8
There is a bus stop close to my home	2%	+5
The waiting times for buses in my area are too long (NET: Disagree)	2%	+7
I would feel safe if I had to get a bus on my own	2%	-4
Bus services are well connected to other public transport	2%	-2
Buses are expensive (NET: Disagree)	2%	+6
Buses are comfortable	2%	-2
I like the idea of being able to talk to others on a bus	2%	-7
I can access real-time information about bus journeys	1%	-1
Buses are clean	1%	+1
I could easily get on-board support from staff	1%	+2
NET: Working	1%	+9
I could get work done on a bus journey	1%	-7
I would be embarrassed to be seen taking a bus (NET: Disagree)	1%	+5
Getting on and off a bus would be easy	1%	+2
Travelling by bus is a way to help the environment	1%	-12
There is too much anti-social behaviour on buses (NET: Disagree)	1%	-3
Urban location	1%	-3
Buses are safe on the road	0%	-1
Buses are too overcrowded (NET: Disagree)	0%	==
Ethnicity (NET: Ethnic Minority)	0%	-5

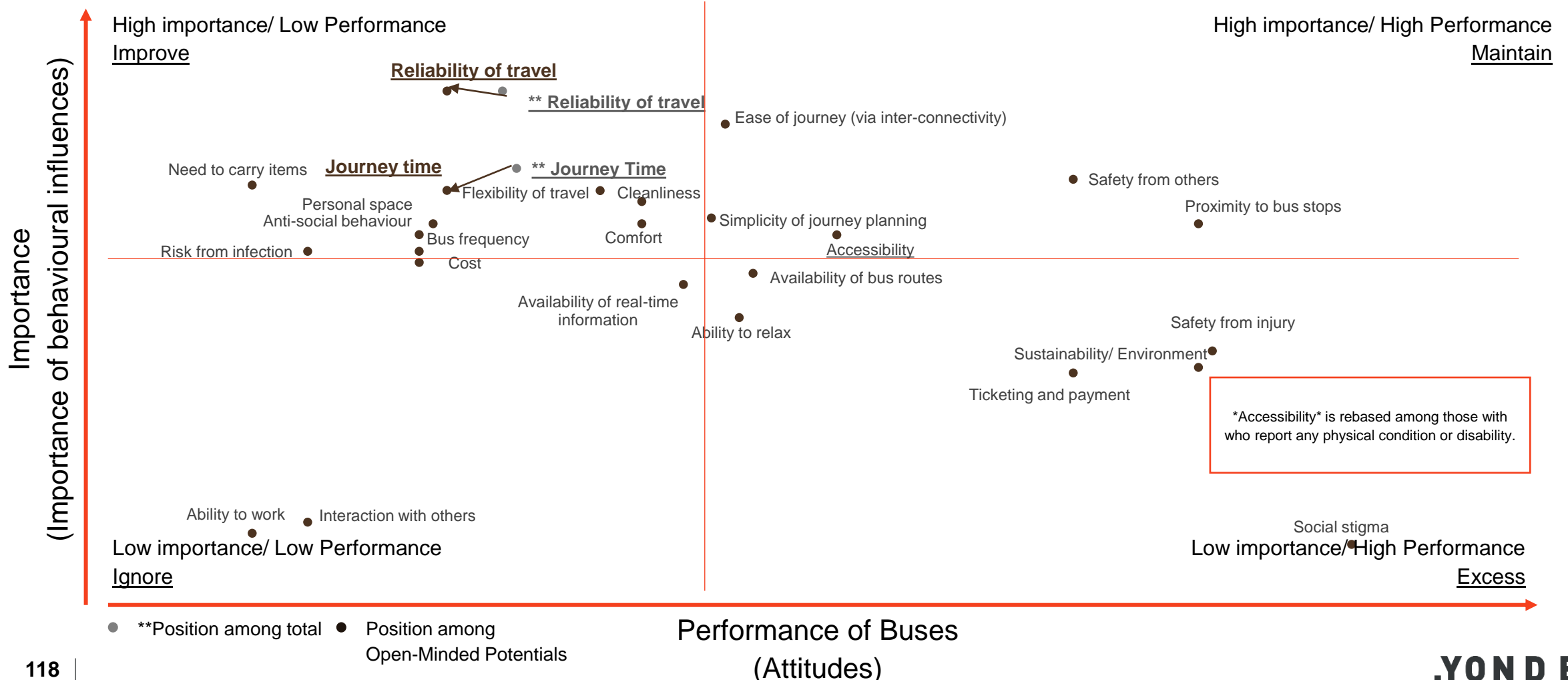
Increasing importance in driving propensity to use bus

In examining the relative change in rank order of factors vs the national population, the following are more likely to explain why some want to use the bus within this segment:

- 1) Working status (employed)
- 2) A belief that viruses are **not** easy to catch on public transport
- 3) Perception that the bus is affordable

Perceptions of bus reliability and journey time are poorer among this audience. These should be the priority

Prioritisation map: This map helps to prioritise areas to develop policies and messages. It identifies how important factors are at driving transport decisions *in general* (Y axis), and how bus is performing on those factors (X axis). Significant movements vs the total are displayed here



They tend to be late adopters of new tech, with some anxiety around data sharing. Yet, they are already using e-solutions for personal responsibilities outside of travel

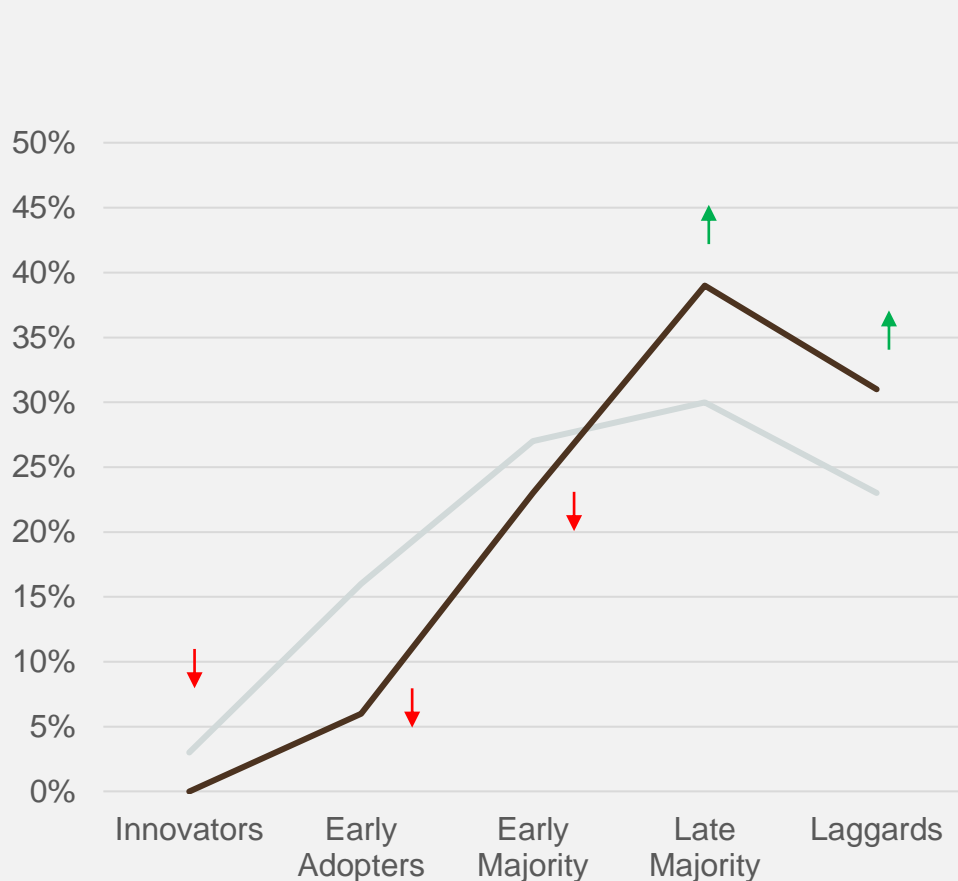
■ Open-minded Potentials

■ Total

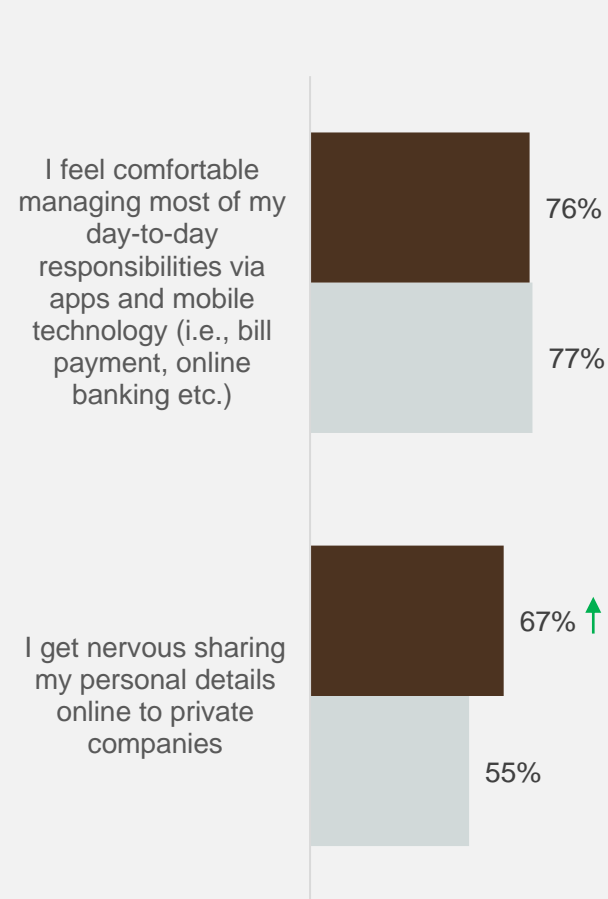
↑ Significant at 95% confidence vs Nat-Rep average

Attitudes towards technology: This indicates how comfortable and open this segment is towards technology and can be used to infer how open they would be to technological innovations in transport

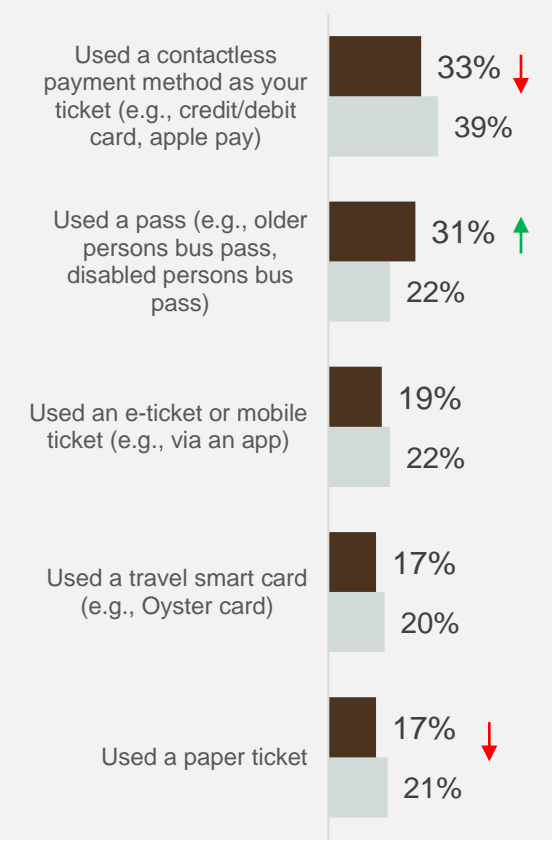
Technology Adoption Curve



Attitudes towards Tech



Current use of public transport payment



119 | Q24. We'd now like to ask you some questions about your attitudes to technology. Which of the following best describes you? Base: Total (8041), Open-Minded Potentials(1448) Q25. Thinking more broadly about your attitudes to technology, to what extent do you agree or disagree with each of the following? Q12. How did you pay the last time you took this journey for ...> in your local area? Base: All using public transport Total (2768) Open-Minded Potentials (439)

MOTIVATING POLICIES (NET A LOT/A LITTLE MORE LIKELY TO USE THE BUS IN THE FUTURE)

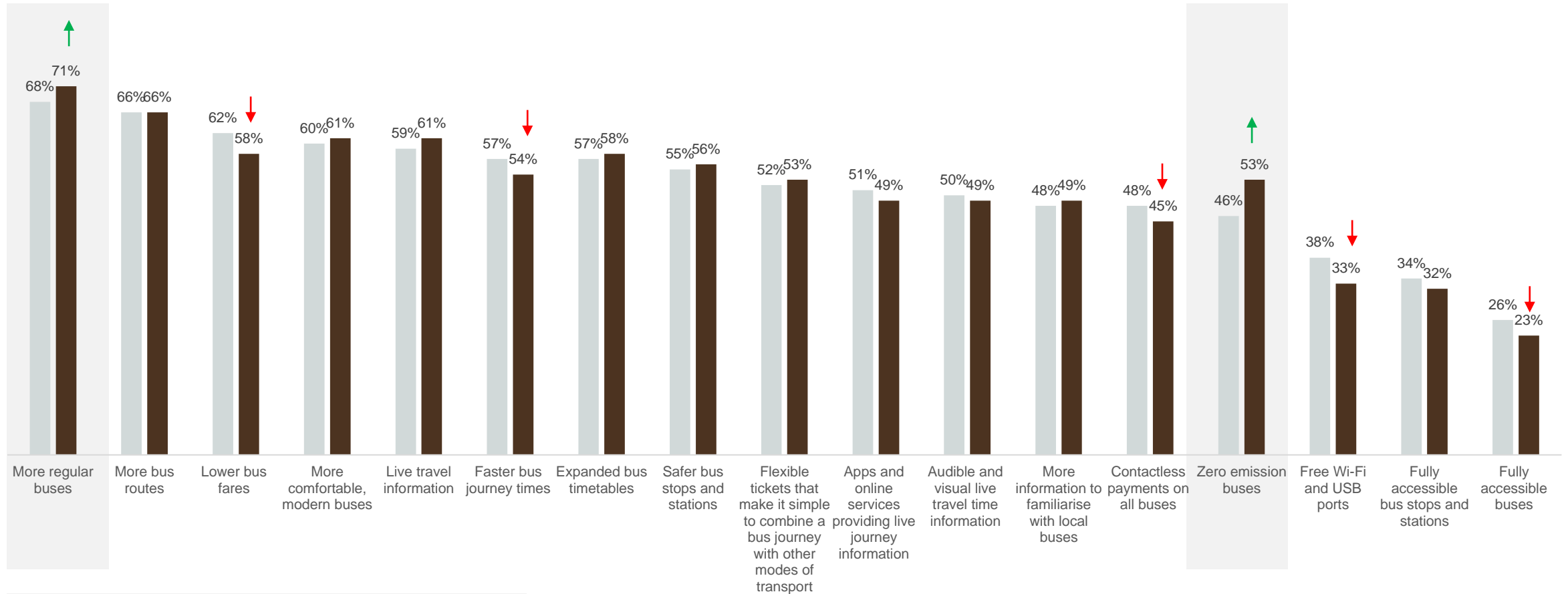
Open-minded Potentials could be motivated by more regular buses

■ Open-minded Potentials

■ Total

↑↓ Significant at 95% confidence vs Nat-Rep average

Impact of policies: This shows which policies this segment claim would make them more likely to use the bus in the future. It can be used to prioritise short-term solutions, and indicate which policies are more relevant to certain segments



N.B. highlighted policies indicate the largest % difference vs total sample

■ Total ■ Open-Minded Potentials

Open-Minded Potentials: Strategic Summary

Mid to Long-Term Target

Who to speak to

- Typically retired age
- Typically female
- Relatively affluent

Targeted ways to engage audience

This segment doesn't have a negative impression of buses, but they don't know much about them, nor would they feel confident in knowing how to get one in their local area.



Speak to practical fundamental needs (reliability, speed, ease)



Environmental benefits

Challenges

1

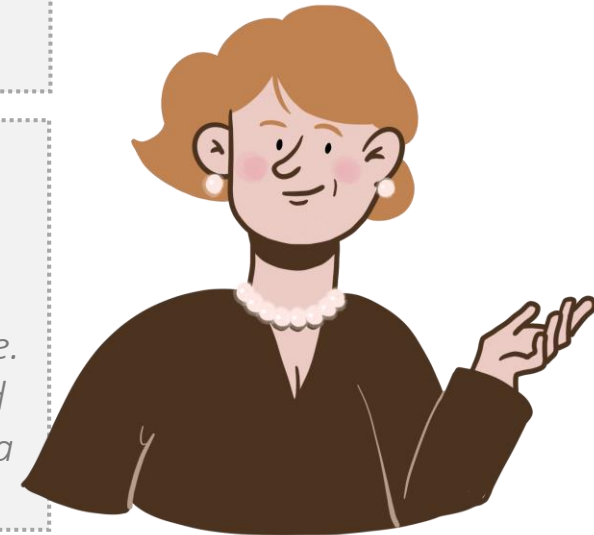
Lack knowledge of bus services, meaning even if services in area improved they may not realise. Improvements to be accompanied by awareness campaign

2

Being affluent, cost of car is not off-putting. Will need to improve infrastructure and show societal benefit to stop them using their car

3

Complex tech solutions/ that require data sharing may alienate. E-solutions should be user tested for ease, and transparent on data sharing



Apprehensive Avoiders

Apprehensive Avoiders Personified



Meet Lizzy . . .

She lives in a town on the Norfolk, Suffolk borders with her husband. Most of her journeys are fairly local, but she enjoys going to Yarmouth or Norwich for shopping trips and days out with her girlfriends.

Lizzy tends to drive everywhere and rarely considers the bus. It's just the car is so convenient, and it feels like such a lot of effort to take the bus anywhere. Most of the time the buses don't run directly to where she wants to go, or they go round the houses and take an age to get anywhere if they do, even to the train station. It takes a lot of planning too, to work out which bus to where and to tie in the return journey - which she doesn't find easy on the local bus website. And she hates the fact she has to keep an eye on the return bus time, as she can't miss it as there are so few of them.

She's quite happy driving and unless there's a dramatic change to her local bus service, can't really see herself using it much more than she already does - which is rarely

“

“You do forget about the bus. It never feels like an option. You don't think ooh, I'll pop on the bus” Apprehensive Avoiders

“The bus stop is right on my doorstep, but I always drive. The whole idea of having to work out which bus to get, waiting around, and thinking what if I'm late, where do I get off puts me off” Apprehensive Avoiders

“You're so used to going in the car you don't think of doing anything different” Apprehensive Avoiders

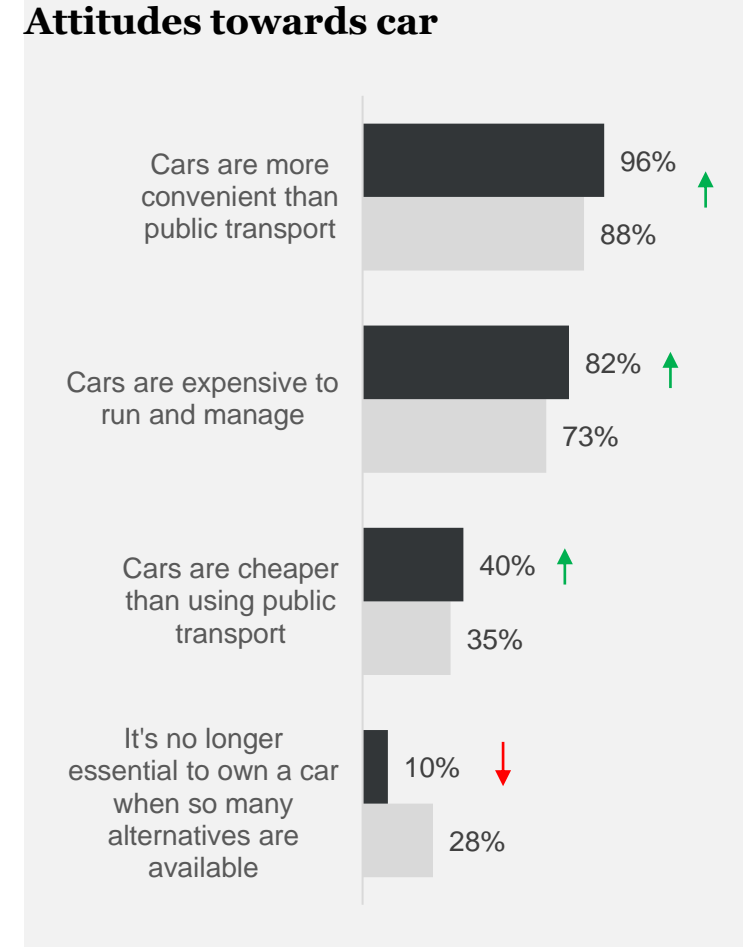
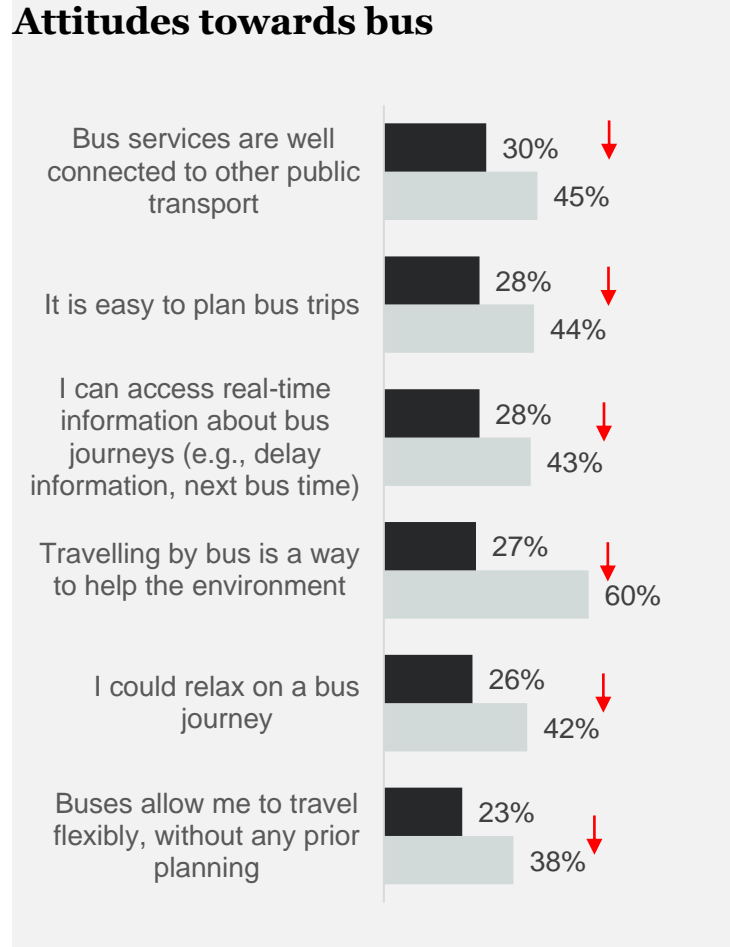
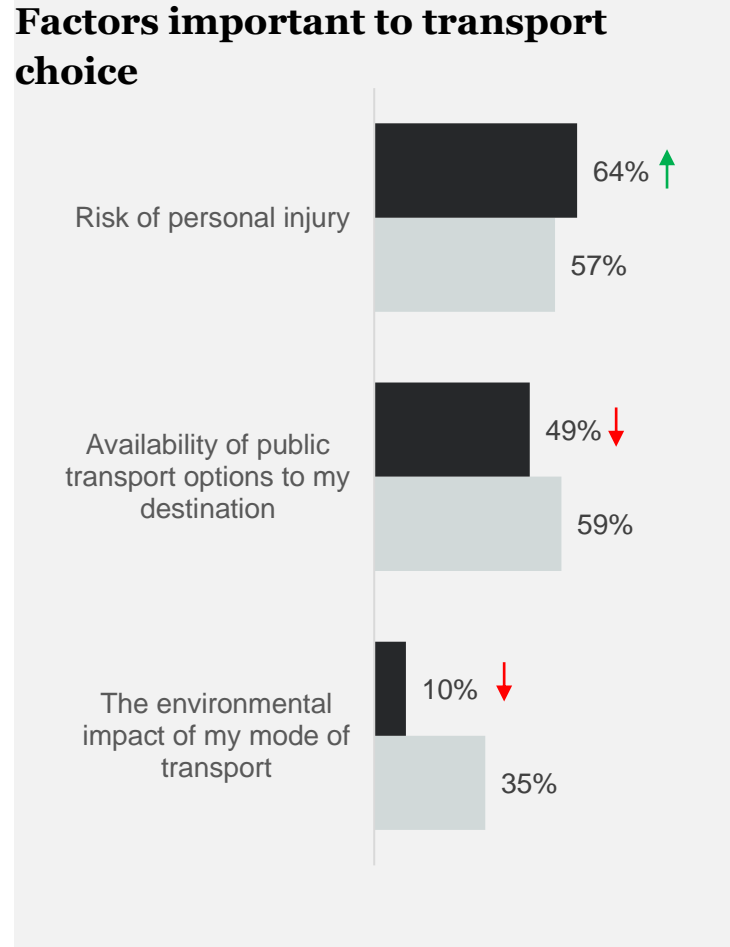
If the bus were an animal she'd say . . .
“A Camel, lumbering along. Slow, frequent stops, gets there eventually” Apprehensive Avoiders

”

They are unmotivated by environmental benefits and hold negative views about the bus service. Though cars are seen to be convenient, there's concern around expense

Apprehensive Avoiders
 Total
↑ ↓ Significant at 95% confidence vs Nat-Rep average

Defining attitudes: This identifies the key attitudes that over or under-index vs the total. By understanding where these drivers and barriers differ, you can develop tailored messages and policies that will motivate this segment to use the bus



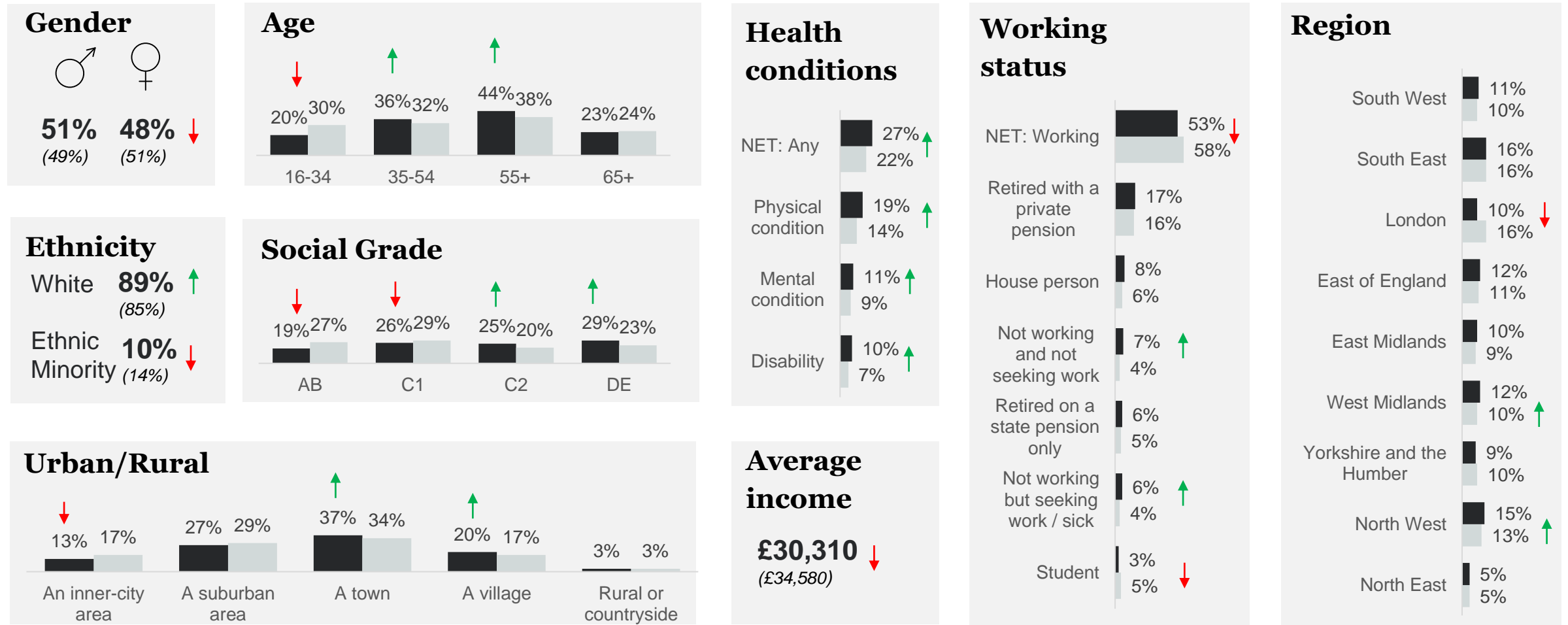
They are more likely to be over 34, of lower social grades living outside of London with higher rates of unemployment and health conditions

■ Apprehensive Avoiders

■ Total

↑↓ Significant at 95% confidence vs Nat-Rep average

Key demographics: This shows the key demographics by segment and where they differ from the total. This can help you target this segment with precision



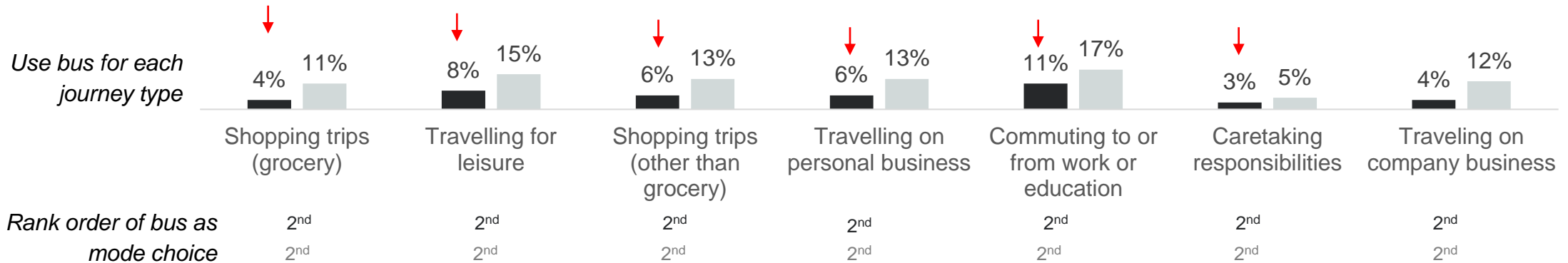
MODE OF TRANSPORT USED FOR TRANSPORT (AMONG THOSE THAT TAKE EACH JOURNEY TYPE)

For most trips, car is usually the only transport mode they ever use

Current transport behaviour: This displays bus usage by journey type and competing modes to understand the extent of the challenge by journey type



Trips ordered by frequency of journey type



Urban dwelling and social embarrassment are more likely to drive propensity vs the nation

Drivers of propensity to use bus: the “Change in rank order vs total” table helps identify how each factors relative contribution in driving propensity has changed vs the national average. It helps to explain where there are differences vs the national average in which factors explain why some do or do not want to use the bus

Change in rank order vs total

Factor	Percentage	Change in rank order vs total
Taking the bus is a quick way to get to my destination	13%	==
My local bus service goes to the destinations I want to visit	9%	+1
Buses allow me to travel flexibly	9%	-1
Carrying multiple or heavy items on a bus is easy	8%	+2
It is easy to plan bus trips	7%	-1
(Lack of) Car ownership	7%	-1
Living in London	6%	==
I can rely on buses to get me to my destination on time, every time	4%	==
I could relax on a bus journey	4%	==
I would feel safe if I had to get a bus on my own	4%	==
Urban location	3%	+14
Paying for the bus is simple and easy	3%	==
I could get work done on a bus journey	2%	+3
Bus services are well connected to other public transport	2%	-1
I like the idea of being able to talk to others on a bus	2%	-4
The waiting times for buses in my area are too long (NET: Disagree)	2%	+4
Buses are expensive (NET: Disagree)	2%	+5
I can access real-time information about bus journeys	2%	==
Buses are comfortable	2%	-4
Getting on and off a bus would be easy	2%	+7
There is too much anti-social behaviour on buses (NET: Disagree)	2%	+3
There is a bus stop close to my home	2%	-5
I would be embarrassed to be seen taking a bus (NET Disagree)	1%	+6
It is easier to catch viruses and infections on the bus (NET: Disagree)	1%	-5
Buses are clean	1%	-4
I could easily get on-board support from staff	1%	-3
Ethnicity (NET: Ethnic Minority)	1%	-1
Buses are safe on the road	0%	==
Buses are too overcrowded (NET: Disagree)	0%	+1
Travelling by bus is a way to help the environment	0%	-16
NET: Working	0%	==

Increasing importance in driving propensity to use bus

In examining the relative change in rank order of factors vs the national population, the following are more likely to explain why some want to use the bus within this segment:

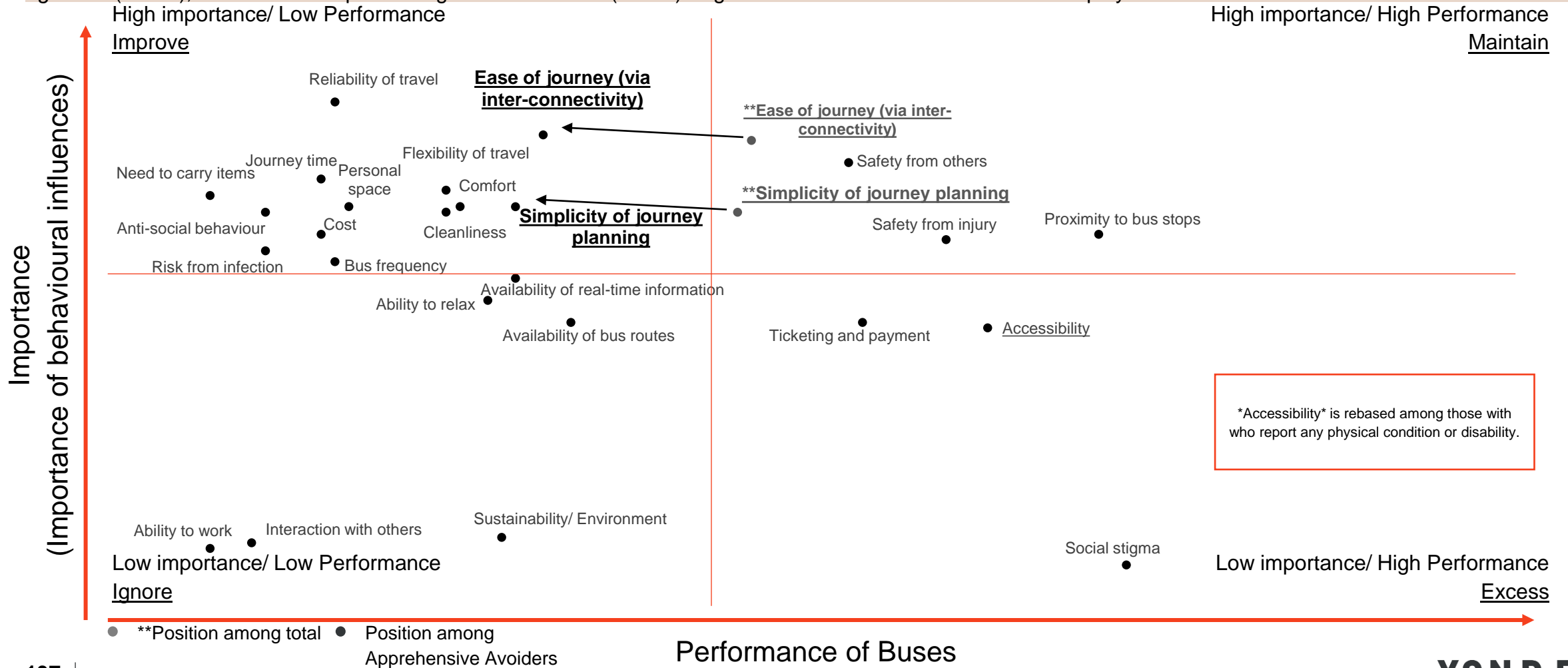
- 1) Urban localities
- 2) Level of embarrassment to be seen taking the bus

The R² for this drivers analysis is 0.44. N.B. This tells us that 44% of the variability in propensity to use the bus is explained by the factors input to the regression model above.

Q3. Which of the following describes where you live? Q16. To what extent do you agree or disagree with the following statements regarding buses in your local area? Q21. How many cars do you have in your household? Base: Apprehensive Avoiders (1323)

Unlike the national picture, this segment feel buses need to improve inter-connectivity and simplicity of journey planning

Prioritisation map: This map helps to prioritise areas to develop policies and messages. It identifies how important factors are at driving transport decisions *in general* (Y axis), and how bus is performing on those factors (X axis). Significant movements vs the total are displayed here



Apprehensive Avoiders show some anxiety towards data sharing, and are less likely to have used e-solutions in travel and personal life

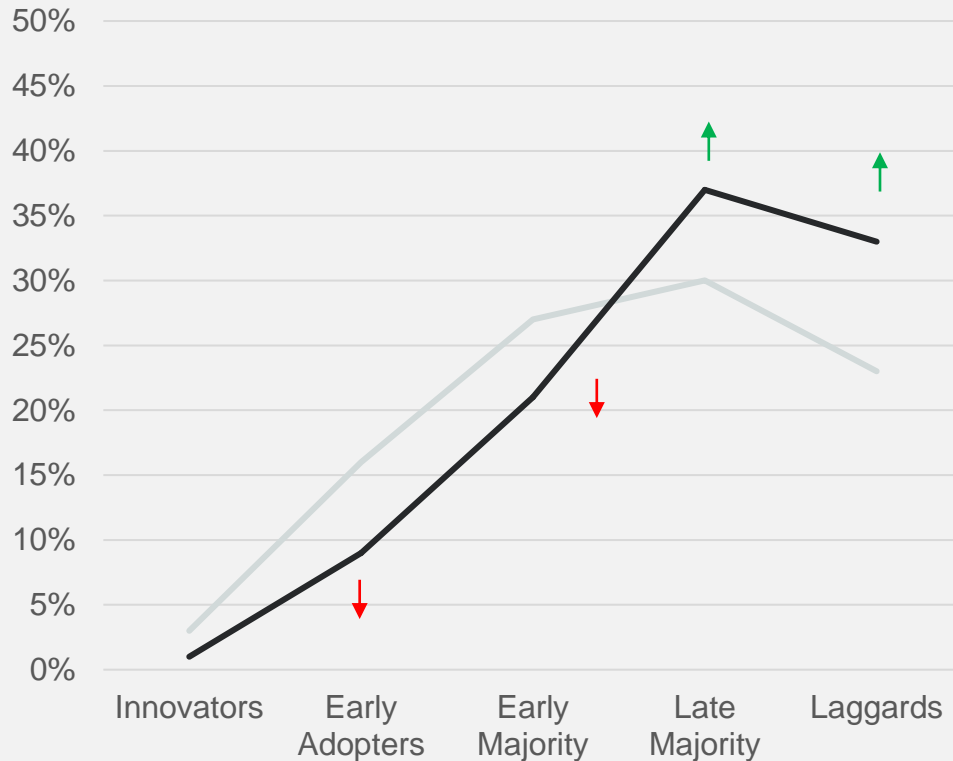
■ Apprehensive Avoiders

■ Total

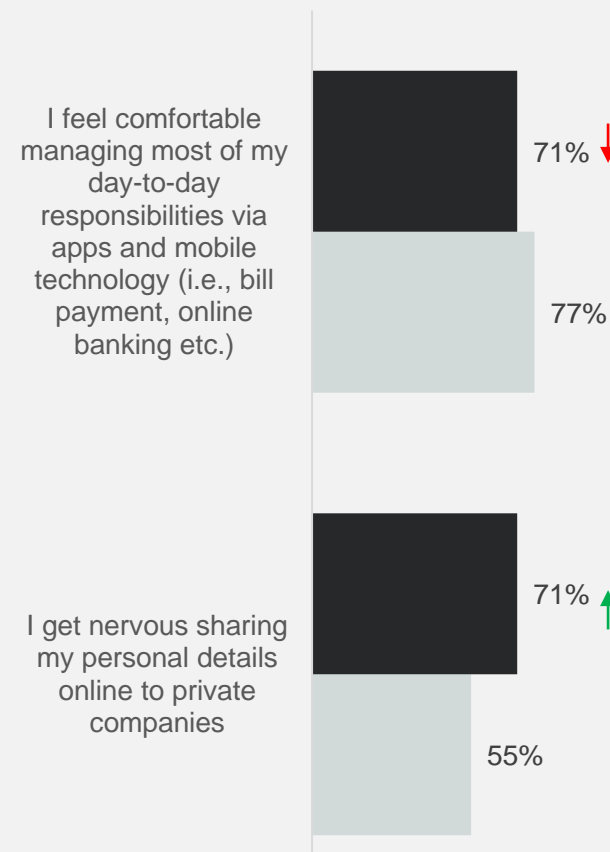
↓ ↑ Significant at 95% confidence vs Nat-Rep average

Attitudes towards technology: This indicates how comfortable and open this segment is towards technology and can be used to infer how open they would be to technological innovations in transport

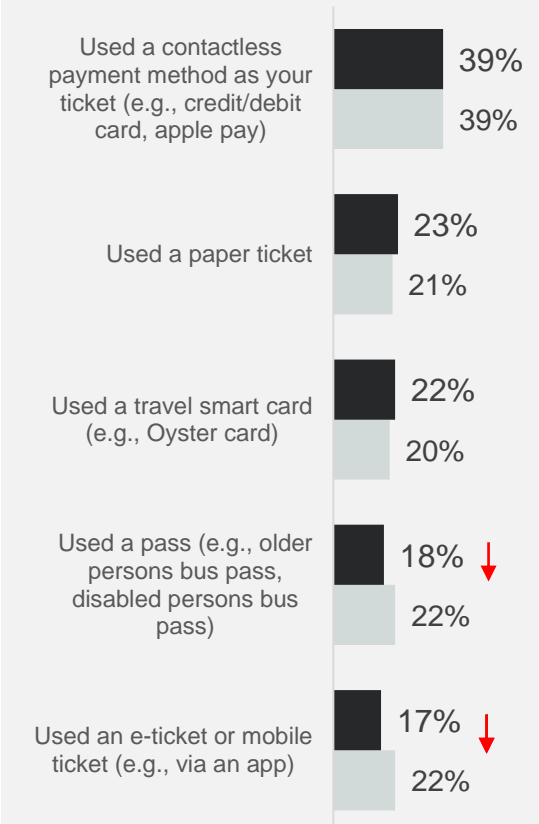
Technology Adoption Curve



Attitudes towards Tech



Current use of public transport payment



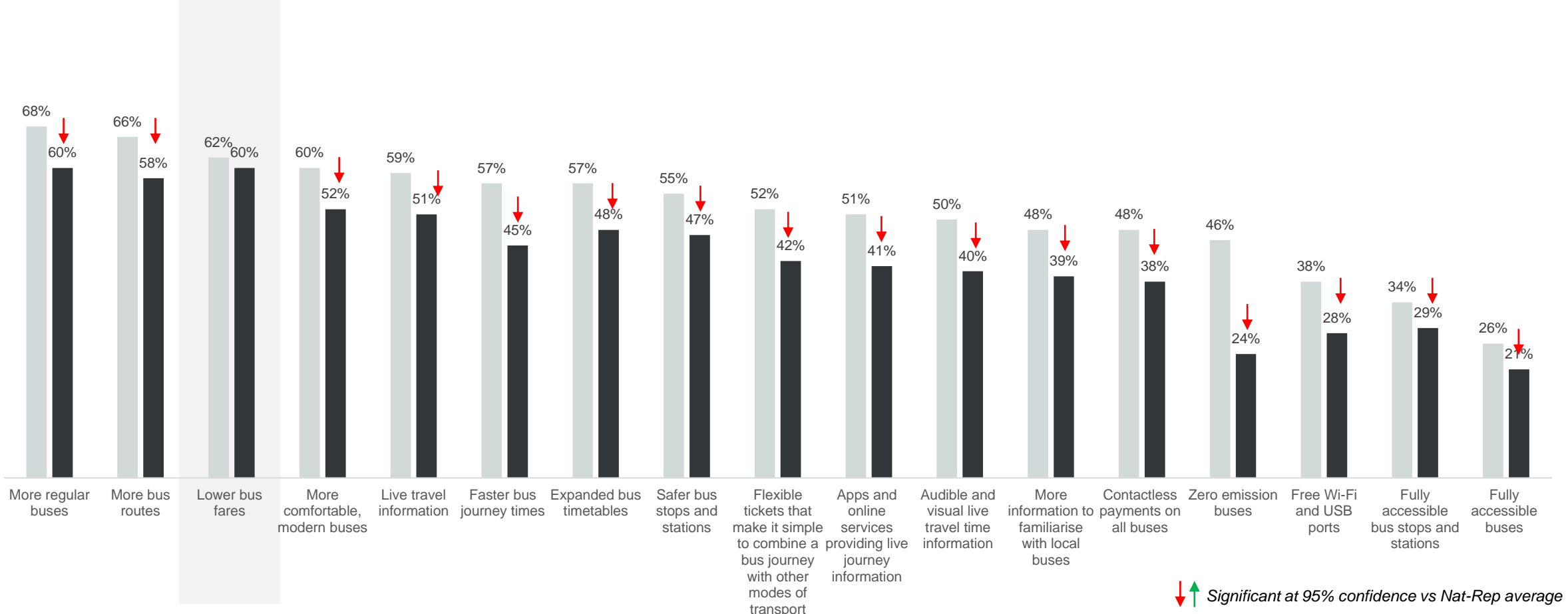
138 | Q24. We'd now like to ask you some questions about your attitudes to technology. Which of the following best describes you? Q25. Thinking more broadly about your attitudes to technology, to what extent do you agree or disagree with each of the following? Q12. How did you pay the last time you took this journey for ...> in your local area? :Base: All respondents answering about each who used public transport Total (2768), Apprehensive Avoiders (256)

MOTIVATING POLICIES (NET A LOT/ A LITTLE MORE LIKELY TO USE THE BUS IN THE FUTURE)

Apprehensive Avoiders are less likely to be motivated by policies. Lower fares and more regular bus fares are most motivating

■ Total

Impact of policies: This shows which policies this segment claim would make them more likely to use the bus in the future. It can be used to prioritise short-term solutions, and indicate which policies are more relevant to certain segments



Apprehensive Avoiders: Strategic Summary

Long-Term Target

Who to speak to

- Typically middle aged
- Typically female
- Lower social grades

Targeted ways to engage audience

This segment has a poor opinion of buses which will take significant infrastructural and marketing work to overcome.



Speak to practical fundamental needs (reliability, speed, ease)



Integrate with other forms of transport for greater inter-connectivity



Demonstrate cost benefit over car

Challenges

1

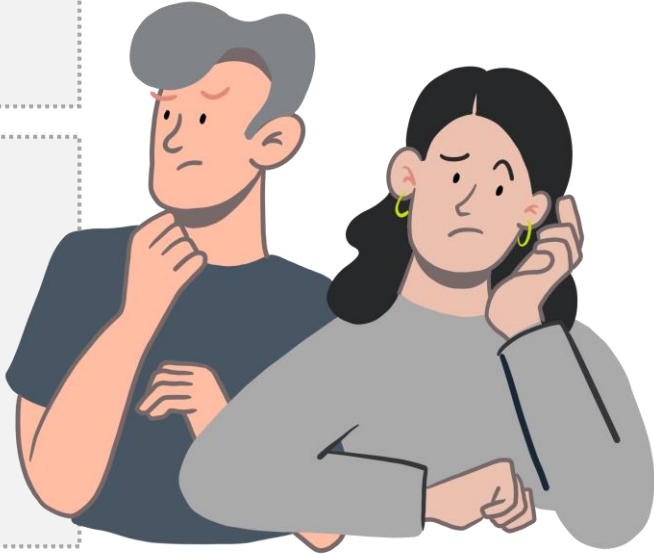
Where they live means significant infrastructural changes required to improve fundamental needs

2

Complex tech solutions/ that require data sharing may alienate. E-solutions should be user tested for ease, and transparent on data sharing

3

Won't be motivated by environment so need to prove a personal benefit (i.e. cost, gets you there faster via bus lanes)



Car-Loving Critics

Car-Loving Critics Personified



Meet Paul . . .

He lives in a village ‘on the edge of nowhere’ as he would say, with his wife, 28-year-old son who’s about to move out and their dog. Semi-retired, he enjoys DIY in the spare time he has these days and meeting with his mates in the pub.

And he loves both his cars, in fact he has two, one a soft top for the summer and he belongs to a car club. He’s quite likely to dismiss climate change, instead believing in the precession of the earth. He rarely, if ever, uses public transport, including the bus, as his area is so poorly serviced by anything.

But you question if he could be converted as he enjoys the flexibility, independence and comfort of his car too much - which he sees as a far more convenient and cost-effective way to travel. Plus, the last time he tried using a bus it never turned up, leaving him to catch a taxi and be late - reinforcing his negative opinions.

“

“The car for me . . . It’s convenient, outside my door, no one else to rely on. I can decide where I want to be, at what time, and when I want to come back.” Car-Loving Critics

“I’m a gas guzzling car man. I have my thoughts about climate change . . . It’s called precession of the earth. But no one wants to believe that” Car-Loving Critics

“They (bus) never go where I want to go” Car-Loving Critics

*If the bus were an animal, he’d say...
“A donkey - a plodder, a beast of burden.
Not a glamorous way to travel”
Car-Loving Critics*

“A panda . . . Because it eats and eats and eats (fuel) and it’s endangered because it’s not evolving” Car-Loving Critics

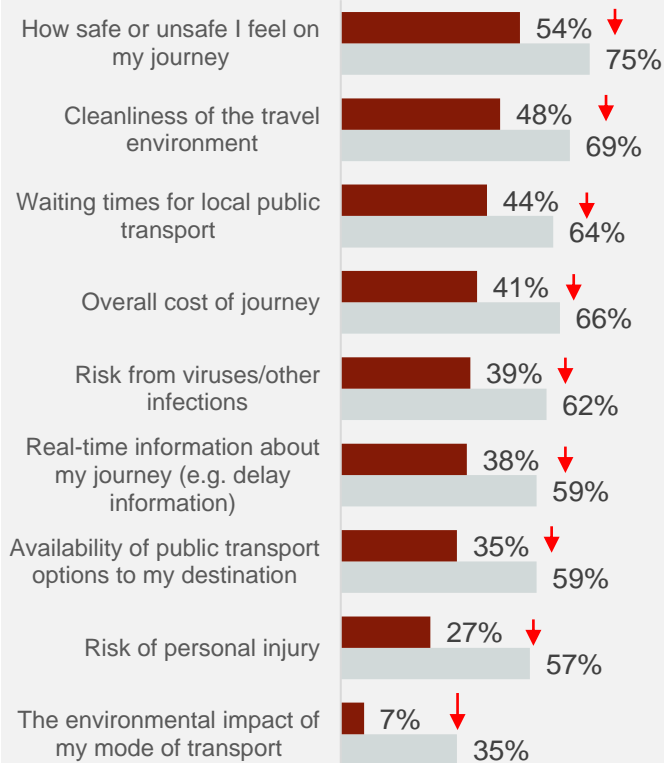
”

They are defined by placing a low importance on many transport-deciding factors. They have very negative attitudes towards bus, and positive attitudes towards cars

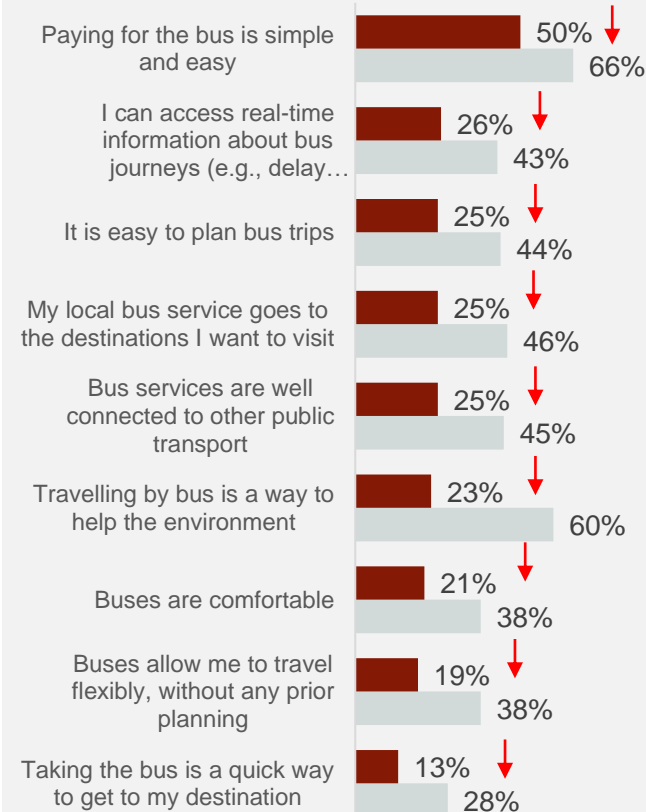
Car-Loving Critics
Total

Defining attitudes: This identifies the key attitudes that over or under-index vs the total. By understanding where these drivers and barriers differ, you can develop tailored messages and policies that will motivate this segment to use the bus

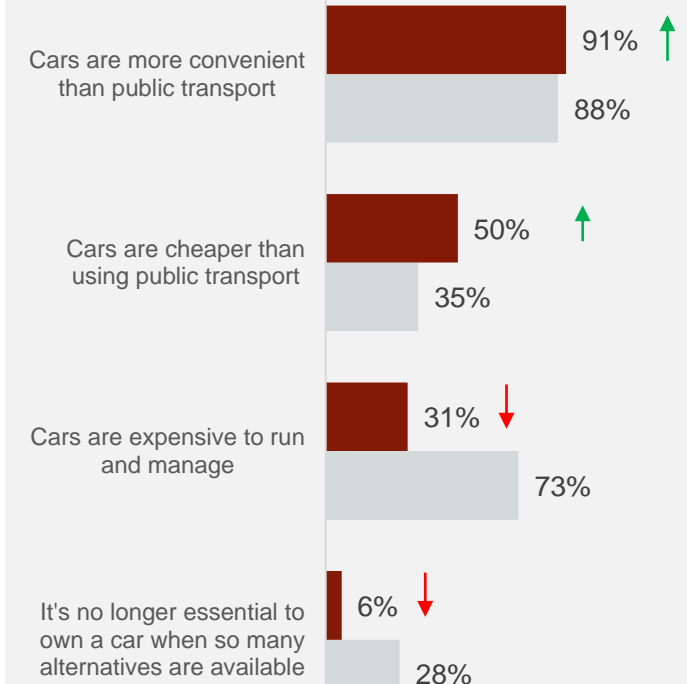
Factors important to transport choice



Attitudes towards bus



Attitudes towards car



They are principally older men in villages or rural areas

Car-Loving Critics
Total

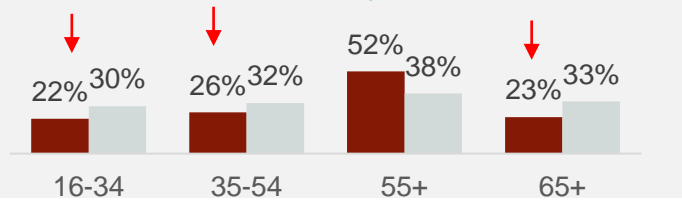
Key demographics: This shows the key demographics by segment and where they differ from the total. This can help you target this segment with precision

Gender

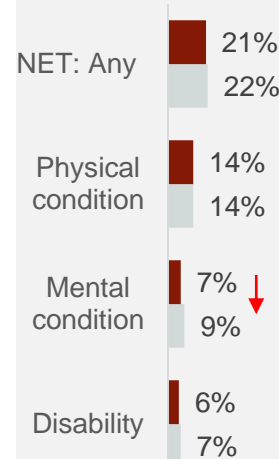


62% ↑ (49%)
38% ↓ (51%)

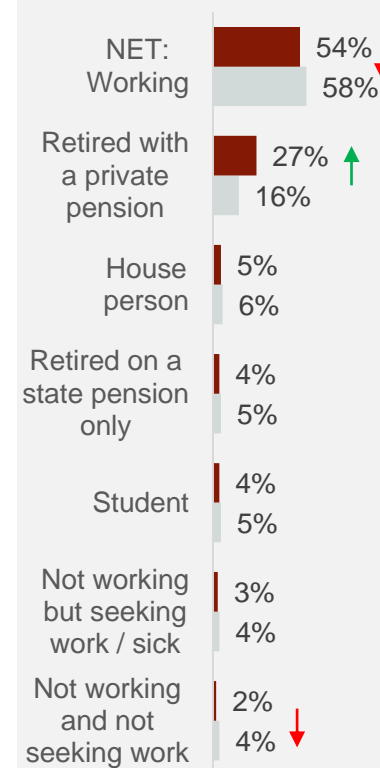
Age



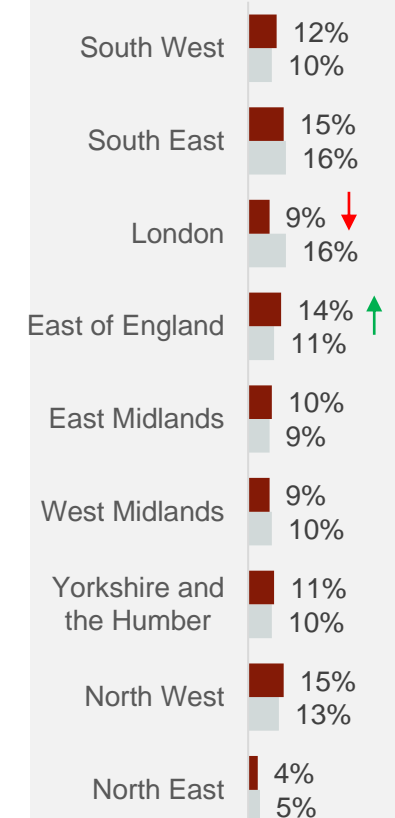
Health conditions



Working status



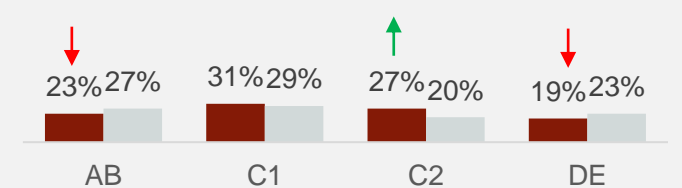
Region



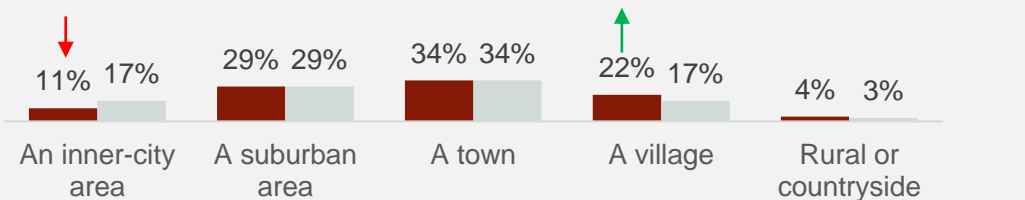
Ethnicity

White 91% ↑ (85%)
Ethnic Minority 8% ↓ (14%)

Social Grade



Urban/Rural



Average income

£36,880
(£34,580)

MODE OF TRANSPORT USED FOR TRANSPORT (AMONG THOSE THAT TAKE EACH JOURNEY TYPE)

■ Car-Loving Critics

This audience rarely uses the bus for any type of trip

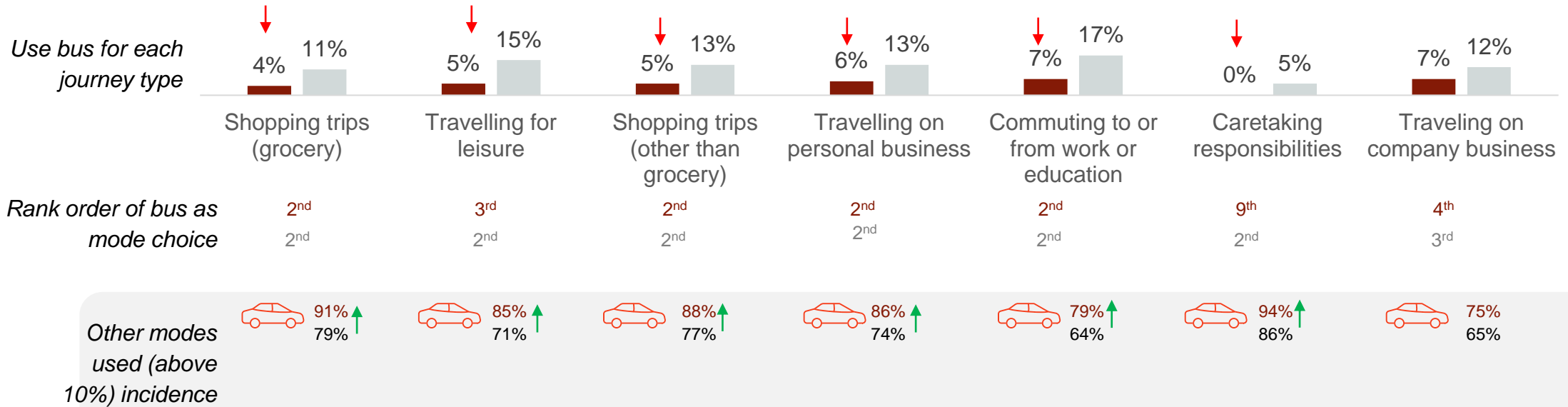
■ Total

↑↓ Significant at 95% confidence vs Nat-Rep average

Current transport behaviour: This displays bus usage by journey type and competing modes to understand the extent of the challenge by journey type

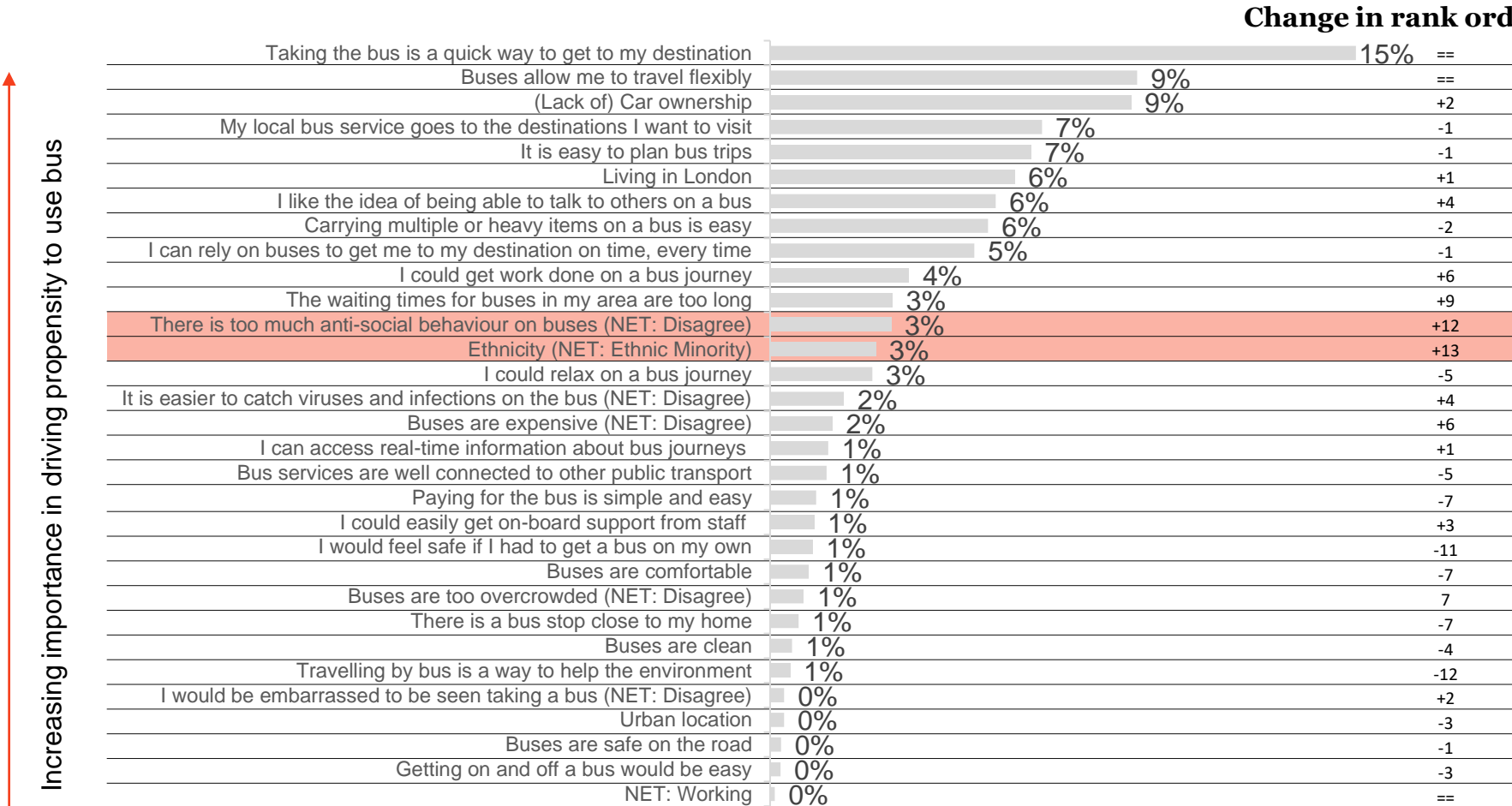


Trips ordered by frequency of journey type



Perceptions of low levels of anti social behaviour and ethnicity were more likely to drive propensity vs the nation

Drivers of propensity to use bus: the “Change in rank order vs total” table helps identify how each factors relative contribution in driving propensity has changed vs the national average. It helps to explain where there are differences vs the national average in which factors explain why some do or do not want to use the bus



In examining the relative change in rank order of factors vs the national population, the following are more likely to explain why some want to use the bus within this segment:

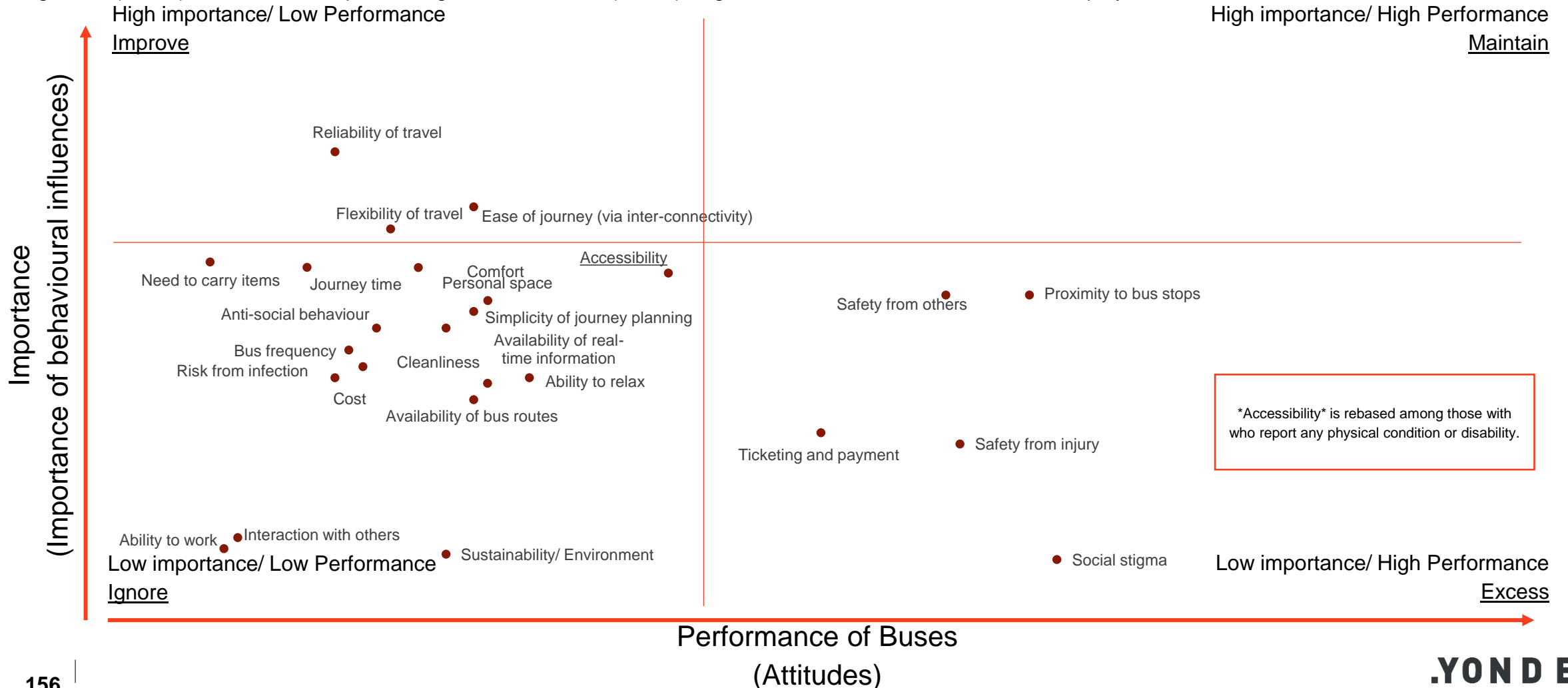
- 1) Belief there is **not** too much anti-social behavior
- 2) One’s ethnicity (ethnic minority)

The R² for this drivers analysis is 0.42. N.B. This tells us that 42% of the variability in propensity to use the bus is explained by the factors input to the regression model above.

Q3. Which of the following describes where you live? Q16. To what extent do you agree or disagree with the following statements regarding buses in your local area? Q21. How many cars do you have in your household? Base: Car-Loving Critics (735)

Unlike other segments, buses do not perform on anything that is important – this is related to their high preference for car

Prioritisation map: This map helps to prioritise areas to develop policies and messages. It identifies how important factors are at driving transport decisions *in general* (Y axis), and how bus is performing on those factors (X axis). Significant movements vs the total are displayed here



Car-Loving Critics are slightly more likely to be late adopters of new tech. Despite this, they hold reduced anxieties around data sharing practices

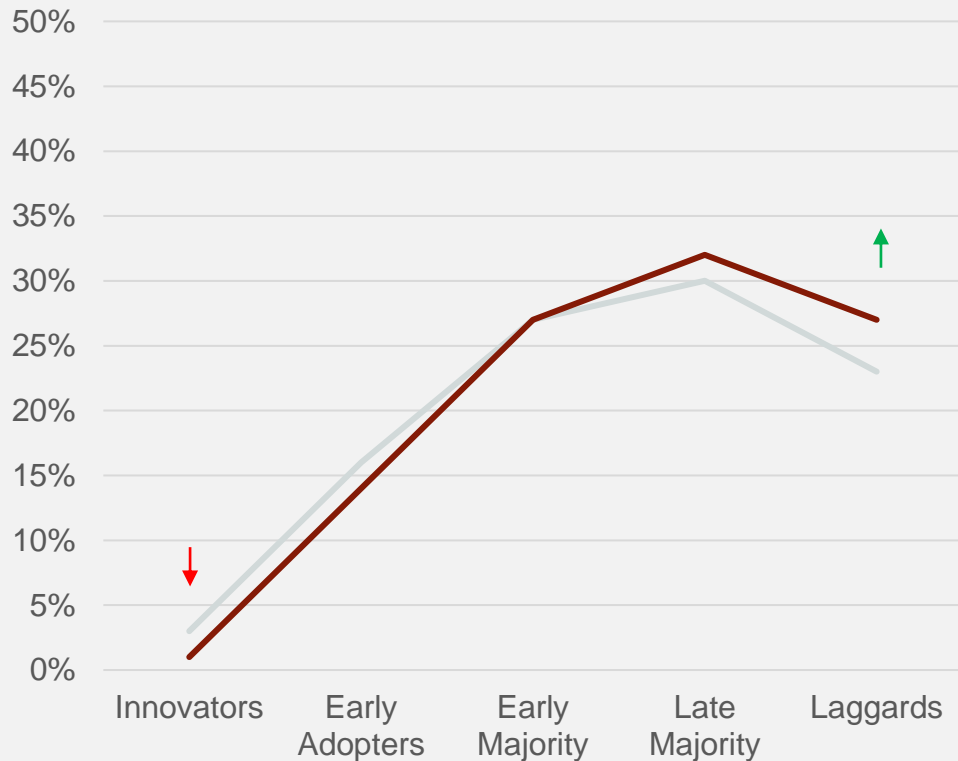
■ Car-Loving Critics

■ Total

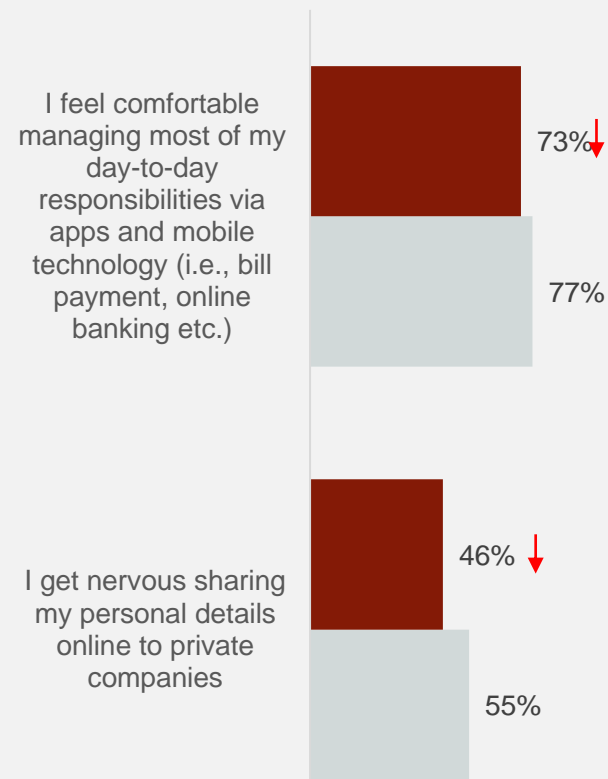
↑ Significant at 95% confidence vs Nat-Rep average
↓

Attitudes towards technology: This indicates how comfortable and open this segment is towards technology and can be used to infer how open they would be to technological innovations in transport

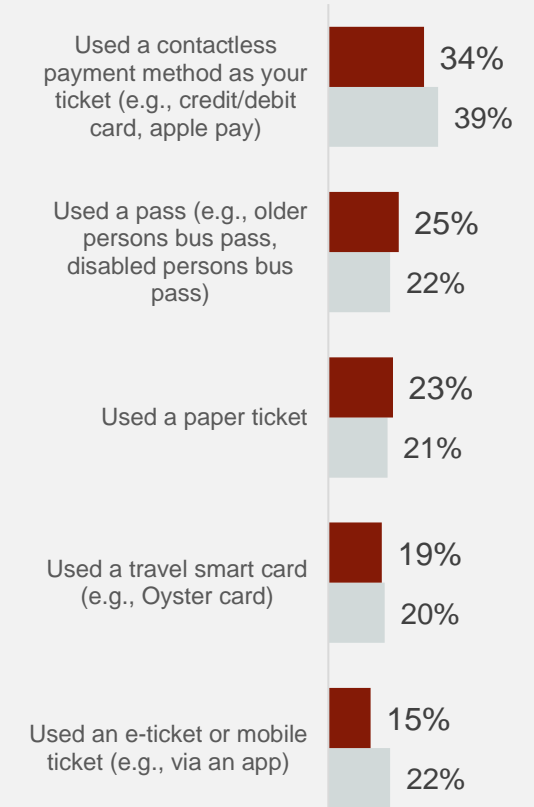
Technology Adoption Curve



Attitudes towards Tech



Current use of public transport payment



157 | Q24. We'd now like to ask you some questions about your attitudes to technology. Which of the following best describes you? Q25. Thinking more broadly about your attitudes to technology, to what extent do you agree or disagree with each of the following? Q12. How did you pay the last time you took this journey for ...> in your local area? Base: All respondents answering about each who used public transport Total (2768), Car-Loving Critics (127)

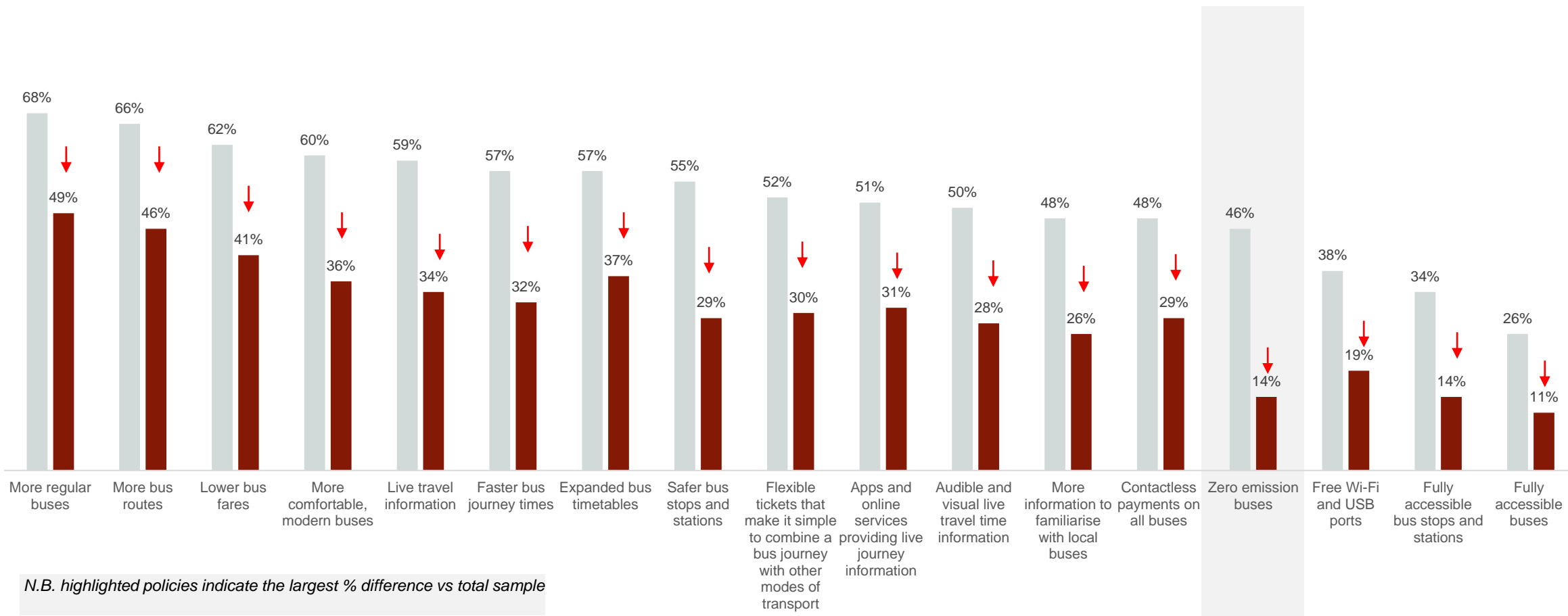
MOTIVATING POLICIES (NET A LOT/ A LITTLE MORE LIKELY TO USE THE BUS IN THE FUTURE)

The current policies in development do not go far enough to motivate bus usage

Total

Significant at 95% confidence vs Nat-Rep average

Impact of policies: This shows which policies this segment claim would make them more likely to use the bus in the future. It can be used to prioritise short-term solutions, and indicate which policies are more relevant to certain segments



N.B. highlighted policies indicate the largest % difference vs total sample

Total Rural Rejectors

Car-Loving Critics: Strategic Summary

Very long term target

Who to speak to

- Typically male
- Typically 55+
- Typically living in rural areas or villages

Targeted ways to engage audience

This segment has such a negative view of buses, that further exploratory research would be required to identify whether any policies or messages could persuade them to use the bus.



Improve practical hygiene factors in local area (reliability, speed, ease)

Challenges

1

Where they live means significant infrastructural changes required to improve fundamental needs

2

Other than core needs, very little is important to them. Exploratory research would be required to identify deeper needs

3

They are attached to their cars meaning messages and policies designed to reduce car usage will be met with resistance



Recommendations

Recommendations

Sustainable
Urbanites



Pragmatic
Professionals



Anxious Vulnerables



Open-Minded
Potentials



Apprehensive
Avoiders



Car-Loving Critics



Short term win segment

Provide low-cost solutions in LAA where they exist in high volumes
Raise awareness and reassure about reliability and speed of bus in high performance areas via an integrated journey planning app

Mid-term target segment

Provide proof points where possible that the bus will get them there quicker and more reliably than car
Consider modernising service in LAA where they exist in high volumes

Mid-term target segment

Adapt buses and bus stops to increase feelings of safety
Keep cost to less than that of car in areas where they exist in high volumes

Mid/long-term target segment

Serious infrastructural investment required to tackle length of journey time for bus vs cars in areas where they exist
Education campaign required after changes

Long-term target

A more integrated public transport network required to ease concerns around journey planning
Serious infrastructural change to tackle length of journey and available destinations

Very long-term target

Consider feasibility of encouraging bus usage for this segment.
Conduct further exploratory research to understand what transport alternatives would work for this audience