# **Customer Group**

24 March 2017

10:00 - 12:00

Room 5D, 5<sup>th</sup> Floor, Windsor House



### Customer Group agenda Friday 24 March 2017, 10:00-12:00 Room 5D, 5<sup>th</sup> Floor, Windsor House

No.	Item	Lead	
1.	Our accessibility customer commitment	Peter Fletcher	
2.	Accessibility data	Shahzad Ashfaque Rikesh Shah	
Items for information only			
3.	Travel Demand Management programme	Stuart Reid	
4.	Bus revenue generation	Mandy Courtney	
5.	Customer group forward agenda and open actions	Vernon Everitt	
6.	AOB	All	



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## Agenda item 1

Our accessibility customer commitment

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#### TRANSPORT FOR LONDON

#### **CUSTOMER GROUP**

Subject: Our accessibility customer commitment

Date: 24 March 2017

#### Customer and user objectives addressed:

• Continuously improve transport accessibility and accessibility information

#### 1 Purpose and decision required

- 1.1 This paper, and accompanying presentation, supports a stocktake on our commitment to making the network more accessible. We are currently reviewing all 10 customer commitments to test progress and priorities, and gain a clear collective view on next steps.
- 1.2 This paper and accompanying presentation is for DISCUSSION.
- 1.3 We will be joined by TfL Board Member Alice Maynard. Vernon is also having a discussion with our Board Member Dame Tanni Grey-Thompson ahead of the session.

#### 2 Objectives of the session

- 2.1 While we have made progress on accessibility, we all recognise that there is an enormous amount of work still to do. This session will review where we are and ensure that our priorities are appropriate and will deliver the necessary improvements.
- 2.2 The presentation sets out the progress we have made in making the network more accessible, the plans in the pipeline, and the barriers and the issues that remain.
- 2.3 The questions we might ask in this session include:
  - (a) What can we do to ensure that people feel confident and supported to travel more?
  - (b) What more can we do to make customers aware of our accessible services?
  - (c) How do we provide a consistent accessibility offer across the whole network?
  - (d) What projects can we deliver to tackle some of the existing barriers and issues?
  - (e) What do we need to prioritise to make the biggest impact?



- 2.4 The session will discuss three themes:
  - a) Customer information
  - b) Staffing and training
  - c) Engagement

#### 3 Background and current status

- 3.1 London has one of the most accessible transport networks in the world. There are now more than 200 stations with level access across London Underground (LU), London Overground, Docklands Light Railway (DLR) and Tramlink. Along with accessible buses, 93 per cent of bus stops are accessible. All our station staff and bus drivers undergo disability equality training, designed and delivered by disabled people.
- 3.2 This is good, but not enough. Feedback from older and disabled people demonstrates there is still much more to do, often in very basic areas. Feedback is set out within the accompanying presentation.
- 3.3 Disabled people make up 14 per cent of the population, and this is set to increase to 17 per cent by 2030. We are seeing both a percentage and real increase in the number of people who will need accessible services.
- 3.4 In addition, we are thinking more widely about who we consider as needing accessible services, to include buggy users, and many people with invisible impairments. There is increasing pressure on us to ensure our network meets the needs of everyone who uses it, as well as those currently travelling less than they need or want to.

#### 4 Contact

4.1 Contact: Vernon Everitt, Managing Director, Customers, Communication and

Technology

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Email: vernoneveritt@tfl.gov.uk

Peter Fletcher, Communications and Engagement Manager – Accessibility

Number: 020 3054 7208

Email: peter.fletcher@tfl.gov.uk

#### 5 Appendix

- 5.1 There are several accompanying appendices to this paper:
  - (a) Customer Group stocktake on accessibility presentation
  - (b) Accessible travel customer information action plan (draft)
  - (c) Please offer me a seat trial debrief
  - (d) Disabled customer gain points 2015







### **Contents**

- Our customer commitments
- Action on Equality
- Where we are now on accessibility
- Current customer and stakeholder feedback
- What are the questions to consider?





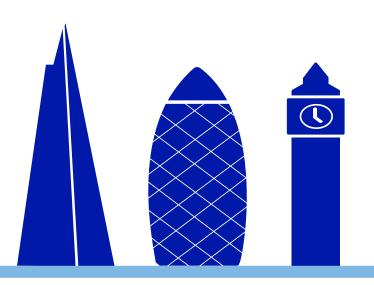
# Our commitment on accessibility

We have 10 customer commitments, including accessibility

London has one of the most accessible transport networks in the world and we are committed to making the network even more accessible for our customers.









#### **London Underground**

- Holistic approach to accessibility an accessible network cannot be achieved through step-free access alone
- Seventy-one stations currently step-free. In the next five years a further 30 stations will be made step-free. Purpose of Step-Free Access programme is to deliver the greatest accessibility improvement in the Tube's history
- Stations staffed while services are operating, so turn-up-and-go staff assistance available to all customers
- Stations upgraded meet higher standards of accessibility tactile paving, colour contrast, lighting etc.
- Deliver schemes in a more innovative and cost-effective way
- To engage with our stakeholders before, and during, delivery.







#### London Overground, TfL Rail and Elizabeth line

- Forty of 83 Overground stations currently step-free
- New walk-through Overground trains with greater capacity and audio-visual information
- All TfL Rail and Elizabeth line stations will be step-free from end of 2019
- All staff trained in disability equality training, providing turnup-and-go service
- New Elizabeth line trains enter service in May 2017 dedicated wheelchair spaces, multi-use spaces, audio/visual information, high colour contrast.







#### **DLR and Tramlink**

- Trams offer full turn-up-and-go step free access network wide
- Revenue Protection staff and Tram Neighbourhood Officers have undertaken locally focused Disability Awareness training facilitated by local charity 'Disability Croydon'
- Regular 'Meet the Tram' days for mobility impaired customers and young people with learning disabilities
- Engaging with local community, London Borough of Croydon and Croydon Mobility Forum
- Separate to our Travel Mentoring programme, Trams provide local accompanied travel for mobility impaired customers who lack confidence in using public transport.











#### **Buses**

- A fully accessible network
- All buses are fitted with wheelchair ramps
- Around 93 per cent of bus stops are accessible, with plans for 95 per cent of bus stops accessible within the next month. This figure is brought down by Bromley, where only 63 per cent of stops are accessible
- We are reviewing our bus design to ensure we can carry both wheelchair users and buggy users
- We have had iBus on buses for more than 10 years
- There are more and more buses fitted with induction loops but two-thirds of the bus fleet do not have them fitted.







#### **Assisted transport services**

- Dial-a-Ride provides independent travel for those who cannot use mainstream modes
- Increasingly focused amongst older age groups (58 per cent of members aged over 80)
- City and Guilds accreditation for Dial-a-Ride driver training
- Dementia Friends training being rolled out to all front line staff
- Working with London Councils to review and improve customer offering of Taxicard
- Travel Mentoring service over 100 Travel Mentoring bus days held each year.







#### Taxi and Private Hire

- All London taxis are fitted with wheelchair ramps, as well as high visibility grab handles, swivel seats, intermediate steps and induction loops
- We are working closely with London taxi manufacturers to ensure that the new ZEC taxi
  models will have a range of enhanced accessibility features, such as forward facing
  wheelchairs
- Customers can request an accessible vehicle from an operator and he operator can, in turn, seek to provide an appropriate vehicle in advance. We are committed to work with private hire operators to increase the availability of WAVs
- Assistance dogs must be carried free of charge in taxis and PHVs recent campaign educated drivers on what is expected of them. Since 2015 we have successfully prosecuted 15 drivers and four operators for refusing to take assistance dogs, an obligation they have under the law for taxi and private hire
- Consulting on proposals for an enhanced taxi test for assisting disabled customers, as well as consulting on the content of a similar test for private hire drivers.



#### Safety and security

- Uniformed officers and staff carrying out high visibility patrols on the network, tackling antisocial behaviour, crime and fare evasion, helping to improve the safety, and feelings of safety across our services. BAME Londoners (40 per cent), disabled Londoners (38 per cent) and women (38 per cent) say concerns over safety and security are a barrier to people travelling
- Prioritising action on high harm offences, raising awareness, encouraging reporting and taking action on offenders:
  - Partnership hate crime project, which includes running monthly community events at hubs and direct engagement with equality groups
  - Project Guardian focusing on unwanted sexual behaviour on the transport network. A refreshed marketing campaign highlights the importance of reporting to build a full picture of offenders
  - STAN (Safer Travel at Night) initiative, tackling taxi and private hire journey related sex offences
- Operation Clearway to keep pavements safe and free of obstructions, enforcing against those persistently obstructing streets.



#### Walking and Cycling

- New decluttering programme to target redundant infrastructure
- Pedestrian Countdown at traffic signals 900 sites across London
- Streets Toolkit is regularly reviewed and updated on our website
- Accessible Bus Stop Design Guidance recently revised
- Kerbside Loading Guidance recently published
- Healthy Streets Vision for London (10 indicators)
- New facilities creating more accessible environments i.e. West Croydon bus station with shelter, improved kerbs, more seating, accessible toilets
- Regularly inspect and repair carriageways, footways, bridges and subways that provide vital access links for the communities we serve
- Bus stop bypasses mini-zebra crossing trial addressing concerns of blind and vision impaired people and representative organisations.





#### Staffing and training

- Hello London! bus driver training to be completed by June 2018
- LU customer service training following Fit for the Future stations
- Online invisible impairments training course
- Disability equality training available in some modes and not always consistent
- Successful history of working with older and disabled people's organisations on designing and delivering training i.e. Transport for All, Age UK London, Scope
- Office staff have one day Equality and Inclusion training course but not disability equality
- Training and knowledge reliant on several accessibility experts knowledge gaps can exist in certain areas
- Deaf awareness and introductory BSL course available to all of our staff.





### **Customer Information and Experience**

- Signage at all stations looking to improve during 2017/18
- Trial of autism-friendly familiarisation guides
- Work ongoing to resolve quality of customer responses, improved granular complaints reporting to tackle potential issues quicker
- Proof of concept for more detailed steps and distance information within Journey Planner
- Working to get app providers to carry at least as good accessibility information as our own services and make use of the data we provide
- We have live and planned lift issues in Journey Planner and our API 24/7. @TfLAccess carries this information too
- Real-time information staff app trial
- Discussion ongoing with YGA and Turkcell on trial of audio real-time bus arrivals information, similar to Wayfindr on LU.





#### **Engagement and press**

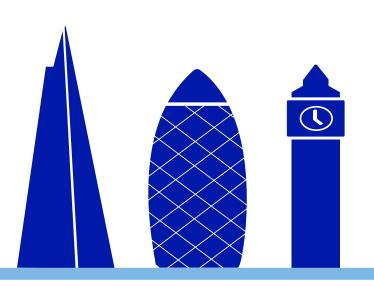
- Established strong relationships with a range of organisations including Transport for All, Whizz-Kidz, Guide Dogs and Alzheimer's Society. Work together closely with them on several projects and seek their views and expertise on accessibility issues, as well as spreading key messages
- Come on Board local engagement programme
- Ran Access all Areas accessibility expo in October 2014
- Recent accessibility integrated campaign has focussed on personal stories aiming to encourage more disabled people to travel by increasing confidence
- Push on getting information out to as many people as possible
- Use @TfLAccess to communicate key messages and engage on issues
- Provide campaign / press / social media support around new initiatives (POMAS / priority seating), awareness days (Disabled Access Day) infrastructure development (progress of step-free stations), raising customer awareness of challenges facing older and disabled customers.







What are the current barriers and issues?





#### **London Underground**

- Toilets gaining greater attention and could be next big issue
   Board discussing this soon
- Continued calls for increasing step-free access across the network
- Some issues, particularly for blind and partially sighted people – lighting, floor surfaces, materials used on steps – which can cause disorientation or make wayfinding difficult
- Lifts / wide aisle gates locations often wheelchair users have to cut across other customers.
- Wayfinding around stations









#### London Overground, TfL Rail and Elizabeth line

- On London Overground, around 50 per cent of stations still do not have step-free access
- Less frequent trains on London Overground can put some customers off due to fear of overcrowding
- In spite of step-free provision network-wide, we should ensure there is seamless customer experience between Elizabeth line, and London Underground, London Overground and DLR services.







#### **DLR and Tramlink**

- Issues with mobility scooter user safety on DLR
- Improving information to mobility impaired passengers pre-journey. There is an opportunity for improving the information for Trams on the Transport accessibility webpage, and revising the Tram Accessibility guide
- We are about to engage in some research on the arrangements for carriage of passengers with mobility scooters and any risks associated with increasing size of the vehicles and method of use. One of the options is to limit the size of vehicles accepted
- We are also reviewing arrangements for mobility impaired persons during unplanned events, and disembarkation away from tram stops
- DLR stations not staffed so expectation of being supported spontaneously not always available
- Though fully accessible, we get reports DLR lifts are small and unsuitable for some mobility aids.





#### **Buses**

- Consistent application across all bus operators of Supreme Court judgment on wheelchair priority space accessibility
- Bus design being attributed as biggest barrier to wheelchair priority space competition — greater calls for us to provide more space for both sets of customers. Early thinking with bus industry taking place
- How can we influence other customers to move upstairs and make space? What was success of indicator trial?
- Plans to reduce buses in central London may be a barrier for older and disabled people – need to ensure this works well for all
- Reallocation of Countdown signs to new areas can put some off travel if they have lost their sign.





#### **Assisted transport services**

- Calls for Dial-a-Ride to be more dementia friendly. In response, trial ongoing to enable some customers with mild dementia to travel independently to their regular activities
- Reliability a key issue for customers vehicle arrival time alerts via SMS being trialled for those customers with mobile phones
- Driver quality a key contributor to Dial-a-Ride customer satisfaction. Work continues to improve driver training and service quality delivered by the taxi and private hire drivers who deliver six per cent of Dial-a-Ride journeys yet attract a complaint rate five times that of inhouse drivers
- All drivers to have smart phones displaying their pick ups/drop off refreshing every hour this should generate more journeys when there are cancellations
- Survey of Taxicard users to identify key areas for improvement for new contract currently gathering responses.



#### Taxi and Private Hire

- Pressure on private hire industry to introduce wheelchair accessible cabs
- There is poor compliance by taxi and private hire drivers. Many customers are still reporting refusal or charged more for carriage of assistance dogs.
- For many people, including wheelchair users, they need to use tactics to make taxi and private hire drivers stop for them i.e. getting a friend or family member to hail.







#### Safety and security

- Hate crime increased risk post Brexit decision and growth in intolerance
- Project Guardian eradicating unwanted sexual behaviour from London's public transport
- Safeguarding young people and vulnerable adults on our network —
  including how we treat ticket irregularities and growth in rough
  sleeping in general, and in particular supporting people with mental
  health issues who sleep rough
- Expanding Operation Clearway to support healthy, accessible streets for people with mobility difficulties
- Enforce the law on taxis and private hire to support accessibility and safe travel.







#### Walking and cycling

- Need to meet Healthy Streets agenda, providing places to stop and rest, shade and shelter and continuing to make streets easier to cross
- Inconsistency of tactile paving application across London's streets – many blind and visually impaired people unsure of what each of the four types means. Upcoming consultation will address this
- Conflict between pedestrian and cycling agenda seen in bus stop bypasses programme
- Greater promotion of facilities for disabled cycling.





#### Staffing and training

- We are seeing greater calls and pressures for Disability Equality Training for senior managers, planners and designers to also better understand the needs of older and disabled people
- Greater support needed for staff to complete EqIAs
- Improve standardisation of training and staff procedures across all transport operators customers are increasingly disappointed by receiving different experiences. This also includes stations served by different operators' staff — Euston, Wimbledon, Harrow & Wealdstone
- Improving staff training so staff can better assist the wide variety of customers being served, while also being more open to us having better knowledge of specific customer's needs
- Potential for better using disabled people to train staff, like at Tower Transit.





#### **Customer Information and Experience**

- Please offer me a seat (POMAS) launches this spring. While raised awareness of people with invisible impairments, more work is still needed to change behaviour on priority seating
- Priority seating signage still does not acknowledge customers with invisible impairments
- Tube maps and guides only updated twice a year so we are not always up to date
- Increased information fed into JP and API customers expecting more detailed and personalised journey planning i.e. number of steps, interchange length, seating at bus shelters
- There are still many people unaware of our maps, guides and leaflets. We need to find new ways of pushing out info.







#### **Engagement and press**

- Stakeholders expecting greater levels of engagement and consultation, before, during and after scheme development and delivery. We must encourage designers and planners to be more open to engaging right from the beginning on projects and plans – consistent engagement approach
- Many older and disabled people are socially isolated, with lower levels of internet and social media use— we need to find new ways of getting important information out to them
- Press stories tend to focus on negative experiences disabled people have using public transport, undermining many people's confidence. We need to tackle this through engagement and publicising positive stories
- Need to ensure information we put out is accurate i.e. Tottenham Court Road step-free.





# **Next steps**

#### Questions to ask:

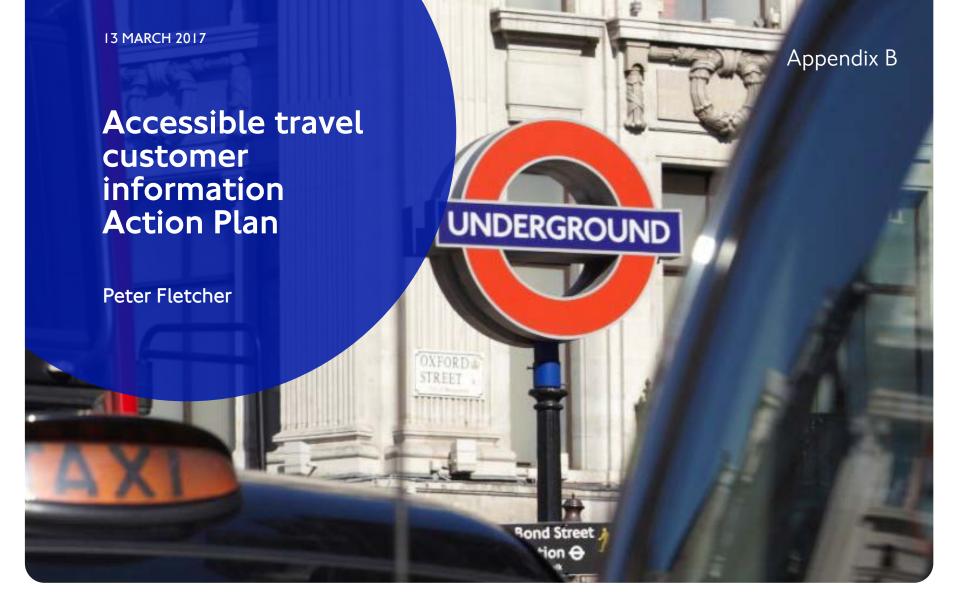
- What can we do to ensure people feel confident and are encouraged to travel more?
- What more can we do to make customers aware of our accessible services?
- How do we provide a consistent accessibility offer across the whole network?
- What projects can we deliver to tackle some of the existing barriers and issues?
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### Introduction

- Last year we worked with Future Thinking to understand what our older and disabled customers think of the information we provide them on accessible travel
- This action plan sets out the key findings from the research
- It also provides steps for us to address feedback and improve customer experience





# Research objectives

- Identify:
  - Where are there information gaps and how can these be addressed?
  - How can existing materials be improved and made easier to use?
  - What do customers expect new materials to look like, and what level of information should they contain?
  - To note, the Future Thinking research did not include people with colour blindness. We hosted a workshop with colour blind customers in October 2016 to understand better their requirements.





# **Key findings**

- Awareness of the majority of materials is low
- Customers find detailed printed accessibility-specific resources extremely helpful
- Printed information will always be needed by those who cannot use digital devices
- Majority of customers are however moving to digital resources
- There are many apps on the market which provide highly useful accessible travel information
- Journey Planner is a key resource
- Staff are invaluable, and we should continue to invest in them





**EVERY JOURNEY MATTERS** 

### **Actions**

This action plan is set out in eight key areas:

- Raising customer awareness of materials we already provide
- Improving and increasing printed information
- Increasing our use of digital information
- Supporting apps and app developers
- Improving Journey Planner
- Better equipping our staff
- Improving information for colour blind people
- Improve TfL's accessibility information management







# Raising customer awareness

- This is our biggest win
  - Materials are useful to customers
  - There is high demand
- However
  - Awareness of materials is low and customers don't know where to get them from





#### Key actions include:

- Accessibility integrated campaign to promote our information
- Come on Board use this grass-roots campaign to directly speak to our older and disabled customers
- Social media @TfLAccess
- Making more of our maps and guides available in locations outside of our network
   libraries, hospitals, museums, leisure centres
- CRM encourage more people to sign up
- Use key events throughout the year (i.e. Disabled Access Day) as opportunities to promote our maps and guides
- Work with local boroughs and press outlets to promote these





# Improving and increasing printed information

- Printed information is still incredibly useful and valuable
- Many customers still do not use smartphones
- However
- Minor tweaks are needed on existing materials
- More detailed information would be helpful





#### Key actions are:

- Familiarisation LU station guides for people with autism, dementia and learning disabilities
- Printing maps and guides currently only available as PDF
- Promoting apps which include information our current materials lack
- Reviewing and adding more detailed information to existing materials (e.g. bus shelter / seats, parking availability near station, number of steps, how long is the walk between points)
- Where there is a clear benefit to a large number of customers, develop new maps e.g. 'claustrophobia' map, avoiding escalators for guide dog users whose dogs haven't been trained







# Increasing our use of digital information

- 77 per cent of customers use online information to plan journeys
- Customers expect real-time information
- However
- There are still plenty of general information, accessibility information and comfort information gaps on our main online tools





#### Key actions are:

- Bus stop details shelter, seating etc. available on Live Arrivals page on website and in API
- Work with business to find information that can be made open and on API
- Customers want better real-time information, e.g. How busy is the station and services? Is the lift working? (There is an ongoing project on this, led by LU Innovations)
- Improve Journey Planner number of alternative routes shown and more detailed information
- Personalisation





# Supporting apps and app developers

- 38 per cent of customers surveyed use smartphone travel apps. For 16-34 year olds, this rises to 72 per cent.
- However
- We don't stimulate developers to use our information to its full potential
- We don't promote existing apps that better our customers' lives





#### Key actions are:

- Highlight best apps for accessible travel
- Working with developers to promote accessible travel as a lucrative and growing market
- Hackathons
- Increased engagement with app developers summit







# Improving Journey Planner

- 65% percent of disabled people and 71% of persons of restricted mobility use the online tool
- However
  - Information around detailed navigation and access is fragmented and not always accurate





#### Key actions are:

- Include National Rail services information
- Provide more route options
- Provide station information such those on the step free guide
- Provide station images and interchange information (walking distance, ramps, number of steps, lift, train dimensions)
- Include more filters e.g. max number of steps able to tackle
- Flag if the return journey is step free
- Include bus stops with seats, shelter and bus dimensions
- Highlight useful non TfL third party resources





# Better equipping our staff

- Contact Centre's staff is generally satisfied with the internal resources available to plan journeys for customers
- However
  - Helping resources are not combined in one place
  - Ground staff finds online information slow to access
  - More accessibility information is needed





#### Key actions are:

- Boosting accessibility champions in contact centre
- Combining internal helping tools for easiness
- Providing staff with more training about different disabilities and conditions
- Continually update staff iPads
- Audit of existing apps and understand how we could link up with developers to assist customers i.e. BeMyEyes





# Improving our information for colour blind customers

- In October 2016, we hosted a workshop and asked our colour blind customers
- Customers do not benefit at all from the black and white map as patterns are very difficult to identify
- There is a particular problem with our bus maps there is too much information, lines, interchanges and colours
- There is a lack of awareness of the Colour Blind Tube Map app

#### Key action:

• Explore potential solutions, including Color Add and numbering lines



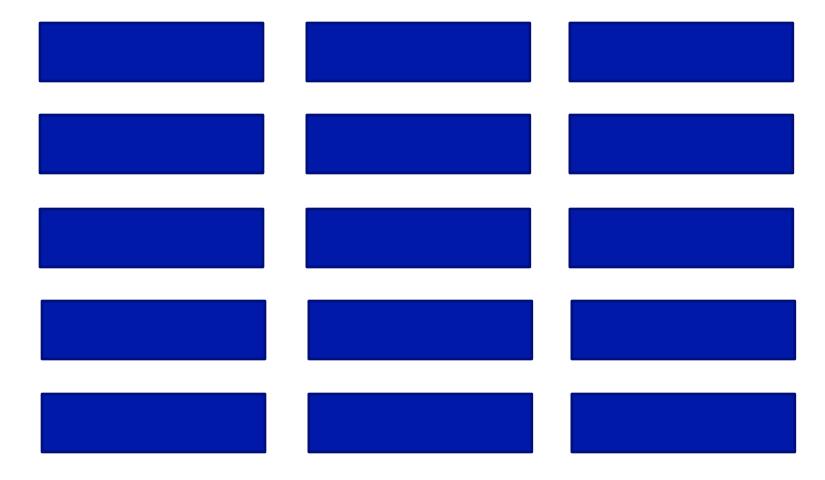


#### Summary:

- We have a great range of material for disabled customers but awareness of those still low, so further promoting is needed
- Printed maps are still extremely helpful even though customers are moving to digital resources
- There are a lot of helpful apps in the market which cover gaps in our resources. We should help promote existing ones and stimulate the creation of new ones by engaging with developers
- Journey Planner is a key resource and needs to be improved
- Staff are invaluable for disabled customers and further training is needed



#### **ACTION GRID**

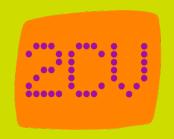








### Appendix C



# 'Please offer me a seat'

Badge and card trial debrief

15 December 2016

Sabrina Mohit, Customer & Employee Insight

Peter Fletcher, Campaigns, Communications & Engagement

Holly Noyes, Marketing Operations



## 'Please offer me a seat' trial - Exec Summary



# Successful outcomes



- There was high enthusiasm for the scheme before and during the trial
- Trial participants felt that the badge and card worked well to get a seat and keep a seat
- They also felt that customers gave up their seat with a positive attitude
- By not having to explain why someone needs a seat, trial customers felt that the badge and card improved their confidence to travel especially those with invisible disabilities or conditions
- Almost all trial participants (98%) say they would continue to use the badge and card and recommend it to others.

### Considerations





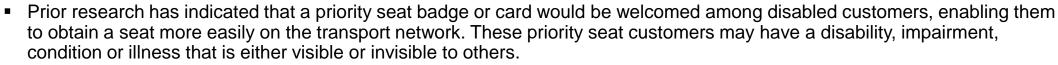
- From a marketing perspective, the badge and card attracts the targeted customers very well
- Trial participants reported that raising awareness with other customers would need to accompany the roll out of the badge and card
- The badge was used on the majority of trips and people reported using the card as a back-up

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### **Background and objectives**









Before we fully launch the badge and card, we wanted to run a trial. This trial aimed to understand how it impacts users' journeys and their confidence using our network, as well as how other customers receive people wearing the badges.

### **OBJECTIVES**



#### Does the badge and card...

- Give disabled customers more confidence to use the network?
- Make people more confident asking for a seat?
- Encourage more travelling?
- Result in an improved travelling experience?
- Help people to get a seat more often (when they need one)?

#### And going forward...

- How could the badge designs be improved?
- Is the message 'Please offer a seat' clear?
- What can we do to support badge users during the launch?

Purpose of the trial: To examine how well the concept would work in practice, pre-empt any issues that may arise and to understand how to make it a successful product with minimised negative experiences for customers

## **Trial design**

# TRIAL GROUP

1,209 customers qualified for the trial and were sent the badge and card

- Recorded their journey experience when they used the badge and card
- Asked to record up to 5 journeys

889 customers went on to complete at least 1 survey Total recorded journeys:

3,470

Please offe me a seat

### CONTROL GROUP

100 customers agreed to take part without using the badge and card

- Recorded their journey experiences
- Asked to record up to 5 journeys

40 customers went on to complete at least 1 survey Total recorded journeys:

182

# **Profile of trial participants**



### **TEST GROUP**

1,200 participants

Gender



16%



Age



43%



45%

Disability/ condition type





8%

Need for a seat

Always

75%

Sometimes

25%

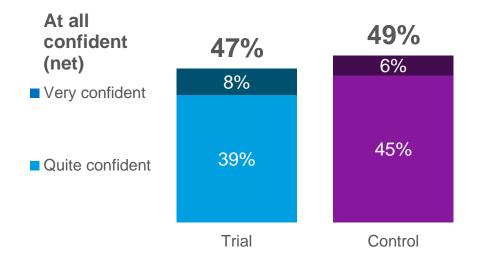
RECRUITMENT SURVEY T2.

Base: All trial sign-ups, Test (1,208); Control (100)

Note: Numbers are rounded so may not add to 100%. Gender question included Other (1%)

#### Before the trial

Only half felt confident in their recent journeys on TfL's transport before the trial started



In line with the fact that men are more likely to ask for a seat, men are more confident with using TfL's public transport



#### After the trial





On **86%** of occasions, participants felt more confident when travelling using the badge and card



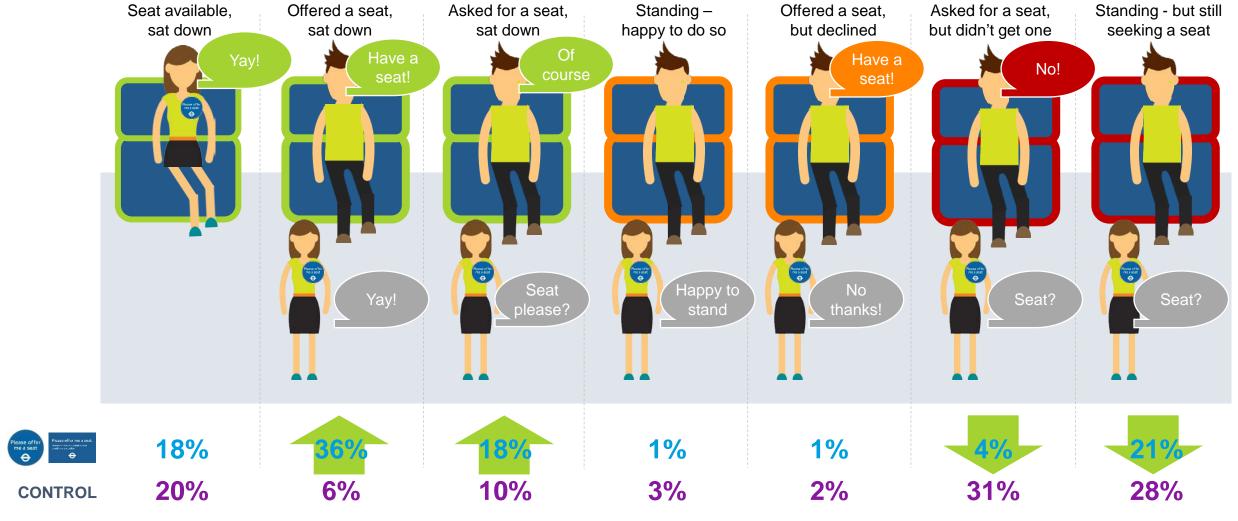
**75%** felt more confident to ask for a seat when they need one

RECRUITMENT SURVEY T3. Thinking about your most recent journeys, overall **how confident** did you feel using TfL's public transport? Base: All trial sign-ups, Test (1,208); Control (100)

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# Getting a seat is easier using the badge and card, with other passengers more likely to spontaneously offer and less likely to refuse





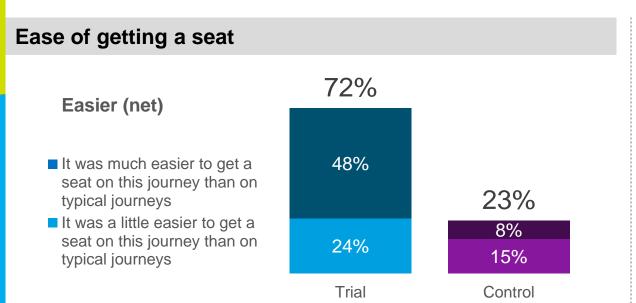
DIARY SURVEY J6. What happened once you got on the transport, where no or few seats were available?/ Base: Test – All journeys where few/no seats were available (3249), Control (164)

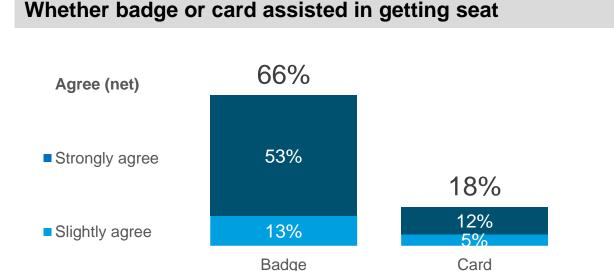
Significant difference at 95%

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## On most occasions it was easier to get a seat using a badge and card than on a usual journey







**56%** agree that 'When I travel in London with the badge and card I don't have to ask for a seat when I need one'

**77%** agree that 'Other passengers are more willing to give up their seat for me when I travel with the badge and card'

The badge especially assisted in getting a seat - they have less need to ask for a seat and other customers are more willing to give them one

DIARY SURVEY J7. To what extent do you agree or disagree that the badge and card assisted you in getting a seat?/ J13. Thinking of times when you usually travel on public transport in London, which of the following would you say best applies?/ J16. To what extent do you agree or disagree with the following statements? Base: Test – All journeys where few/no seats were available (3249), All who got/ were seeking a seat (test -3200), (Control – 156), Used/ took badge (3200), Used/ took card (2781)

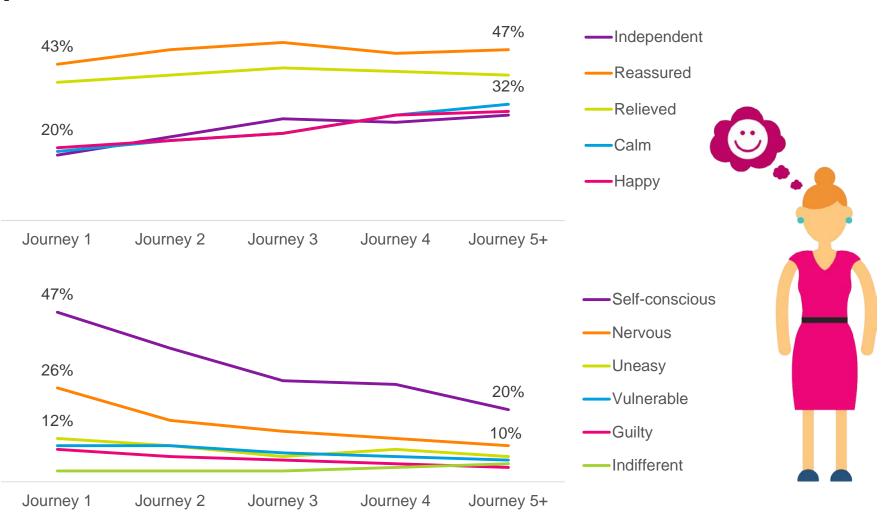
# Positive feelings when using the badge and card increased as the trial progressed, and people were less self-conscious and nervous over time



Feeling of independence, happiness and calm increased for subsequent journeys

Those with invisible disabilities were more likely to feel self-conscious but also more likely to feel reassured and relieved

Feelings of being **self-conscious** and **nervous** decreased as the trial progressed



DIARY SURVEY J9 Which of the following best describes how you felt when travelling with the badge and card? I felt .... Base: Test (3470)

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# At the end of the trial, participants were positive about the experience and keen for the scheme to be rolled out more widely



PLEASE launch it! I haven't heard a bad word about the scheme yet, everyone I've spoken with thinks it's a fantastic idea

Overall, I have had an incredibly positive experience and it has given me a lot of comfort when travelling on TfL services

Thanks to you for giving me the opportunity of taking part. Although at first I'd say I felt 'self conscious' I soon gained confidence

Please do continue with the badge. I now use it all of the time and can not do without it

It has been invaluable in increasing my confidence to work in peak times and I am so grateful to TFL

It was a real pleasure taking part in the survey, and I do hope they go ahead with the scheme. It definitely made a difference to me, so thank you for the experience

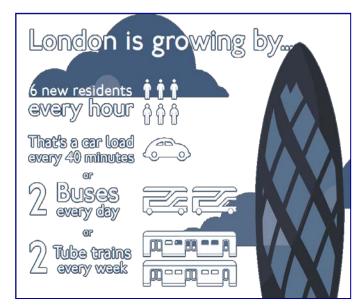
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# The needs of disabled people are part of the challenges we face

- ➤ London is a growing city, increasing the frequency and level of annoyance of pain points
- We know that crowding is already a barrier to older and disabled people travelling more
- London is an increasingly diverse city
- More cost effective to ensure that disabled customer pain points are built into our wider customer strategies
  - > This alignment will be more efficient as we will get more from our investment



The key is alignment



# **Focussing for Action**

We need to keep up the momentum to improve the journey experience for disabled and older customers

#### This paper identifies key themes for action

(In order of importance based on frequency and level of annoyance)

- 1 Bus customer experience
- 2 Condition and space in pedestrian environment
- 3 Station staff availability (incl LU, Bus Stations, Overground and DLR)
- 4 Ramp availability and provision (incl LU, Rail, Bus and TPH)
- **5** Priority seating
- 6 Access to PHVs by assistance dog users



# 1. Bus customer experience

## The Situation

- The most frequent and annoying pain points for disabled customers are around the bus customer experience
- A bad bus customer experience leads people to avoid using the service, leading older and disabled customers to stop using public transport and rely on Dial-a-Ride or stay <u>at home</u>.

"Buses! I was denied access to four consecutive buses" Disabled customer comment on Twitter about being not let on the bus





### What we are doing

- New bus experience programme including driver training focussing on an enhanced customer service
  - This will accommodate a more friendly and conversational experience on buses to help customers resolve issues themselves and reduce pressure on drivers
- o Tackling the **wheelchair priority space** issue in a number of ways (number of bus drivers asking buggy users to make more room has since doubled)

## Gaps and next steps

- Review multiple elements of the programme around disabled and older customer journey experience
- Ensure accessibility is an integral part of the new bus staff training



# 2. Condition and space in pedestrian environment

#### The Situation

- Poor street environment and clutter can cause big issues for older and disabled customers (particularly blind and vision impaired), leading to social isolation
- Narrow and crowded pavements also cause problems



RNIB recently published a report called 'Who put that there?' describing issues that vision impaired customers face on our pavements.



### What we are doing

- Reviewing tactile paving research identified that there is a lack of education and consistency, which is confusing to users
- Operation Clearway is determining how we can better enforce streets and remove business clutter i.e. A-Boards



#### Gaps and next steps

- Stakeholder liaison role and more resources need to be put in to work with businesses to remove street clutter
- Need common London-wide protocol on how we and boroughs manage street space together



# 3. Station staff availability



#### The Situation

- Hugely important for older and disabled customers
- The proportion of assessors able to find a member of staff to help has been 75% for both Overground and LU (combining the last 4 quarters from the Accessibility Mystery Travelling Survey)
- o Negative publicity about closed lifts when staff are not available
- Staff availability at bus stations tends to be slightly lower





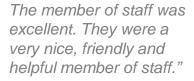
#### What we are doing

 Fit for Future Stations is making more staff available to customers, although stakeholders fear that this is not going to be the case



### Gaps and next steps

- Monitor the impact of FfFS on staff availability through the Accessibility Mystery Traveller Survey. Include comparison across different modes and comparison with availability to all customers
- Need to investigate whether staff are closing lifts down unnecessarily, when not available



Hearing impaired AMTS assessor (Highgate)



# 4. Ramp availability and provision



#### The Situation

- Ramps are essential for wheelchair users, as well as customers with luggage and buggies
- o In the latest AMTS, while ramp availability remains high at the required LU and Overground stations, when they are unavailable, it is a **significant pain point**
- Some concern about Night Tube and a lack of staff to assist with MBRs at less staffed local stations



#### What we are doing

- Developing more prototype ramps with aim of having them in stations that need them
- Increasing awareness of MBRs through accessibility campaign





#### Gaps and next steps

- Continue to roll out the MBRs to stations where they are required
- o Ensure that MBR use and deployment continues to be a key part of staff training and briefings across LU, Rail, bus and TPH



# 5. Priority seating

#### The Situation

- Older and disabled people can struggle to access priority seating, leading to difficult, uncomfortable and potentially unsafe journeys
- Insight and stakeholder feedback suggests there is conflict around priority seating
- People with hidden illnesses and younger people who need priority seats (such as mental illnesses or undergoing drug therapy) can find it difficult to get a priority seat

# "It's all about people's attitudes..."

(Customer with learning difficulties talking about priority seating)

"It's like all man for himself, it can be vicious place...people do not make eye contact and you can't see which seats are priority and which are not" (Woman with hidden illness, drug therapy)



 Currently undertaking research to determine whether to progress with possible solutions



## **Priority seat**

for people who are disabled, pregnant or less able to stand

## Gaps and next steps

- Discuss and take forward recommendations from research, likely to be a more holistic approach including:
  - o Educating customers around priority seating
  - Using design, signage and marketing to make priority seats more obvious and to dissuade those who do not need them to not use them
  - Possible card or badge



# 6. Access to PHVs by assistance dog users

#### The Situation

- It is illegal for a PHV driver (or any service provider) to discriminate against a person using a registered assistance dog (unless they have a specific medical exemption certificate)
- Customer and stakeholder feedback shows that the majority of customers with assistance dogs have been refused by PHV booking staff or drivers at some time
- In some cases there has also been an attempt to charge more for customers with assistance dogs users

## What we are doing

 TPH developing driver comms campaign and accessibility awareness training into licensing applications



#### Gaps and next steps

 Continue to monitor this issue and to push the awareness that it is illegal to refuse





# Summary of next steps and actions

(In order of priority based on frequency and level of annoyance)

- Bus customer experience optimise the new bus experience programme coverage for disabled and older customers (*NB: there are multiple elements that will need to be considered*)
- 2 Condition and space in pedestrian environment stakeholder liaison with businesses and working together with boroughs on street space
- 3 <u>Station staff availability</u> monitor impact of FfFS on staff availability and investigate the closure of lifts around staff availability
- Ramp availability and provision continue to roll out MBRs and ensure that it continues to be part of staff training across modes
- Priority seating take forward recommendations from research (likely to be around a more holistic approach incl. educating customers, marketing solutions and possible cards or badges)
- 6 Access to PHVs by assistance dog users continue to monitor and push the awareness that illegal to do it



# **Next steps**

For agreement and discussion



Customer Group to agree the top 6 priorities will be acted on



Responsibility – ensure that disabled and older customer needs are built into existing Pain Points Plans and Customer programmes (for example bus, LU, roads and information plans)



Could the next years pain points fund be used to fix any of these pain points? - Potential themes for funding include condition and space in pedestrian environment, priority seating and access to PHVs by assistance dog users



They are also feeding into the new Single Equality Scheme (SES) and the new Accessibility Implementation Plan (AIP)



# **APPENDIX**



# Public Transport Pain Points – disabled customers

New Customer pain point for disabled people

Existing all customer pain point

**VERY ANNOYING** 

Not being able to get

help from a member

of staff when needed

Ramp not

bus, TPH

Being charged a max fare on

Unstaffed stations after dark,

R&U staff -Poor attitude / rude

available or

working - trains,

Hearing good service announcement about your line when experiencing delays

> Lifts closed due to staff shortage

Not being able to book a DaR journey

Max fare charge with same station entry/ exit due to service disruption

Hearing aid loops

inconsistently used/not

working/not advertised

Not being able to resolve a ticketing problem at the

station

especially quiet local stations

Dead space within stations

an Oyster card

behaviour

Navigating the network with luggage, push chairs, wheelchairs

Paying extra for changing buses of time queuing to buy a ticket

Dissatisfaction with length

Lack of real time info at stations and from bus drivers

**Bus Drivers not** asking Buggy users to give up space for wheelchair

users

Bus Driver Behaviour – Refusal to stop, open doors, let customer on

**Bus Driver Behaviour - Poor** /dangerous driving. Not waiting for people to sit/hold on

available

No priority seating

**Bus Driver Behaviour -**Offensive behaviour

Bus Driver Behaviour – pulling in close enough to kerb and stop, lowering bus, deploying wheelchair ramp

**Bus Driver Behaviour** - Poor customer service

Anti-social behaviour of other customers

Train/bus terminating early/changing end location

Lack of toilet facilities incl. closed toilets for no reason

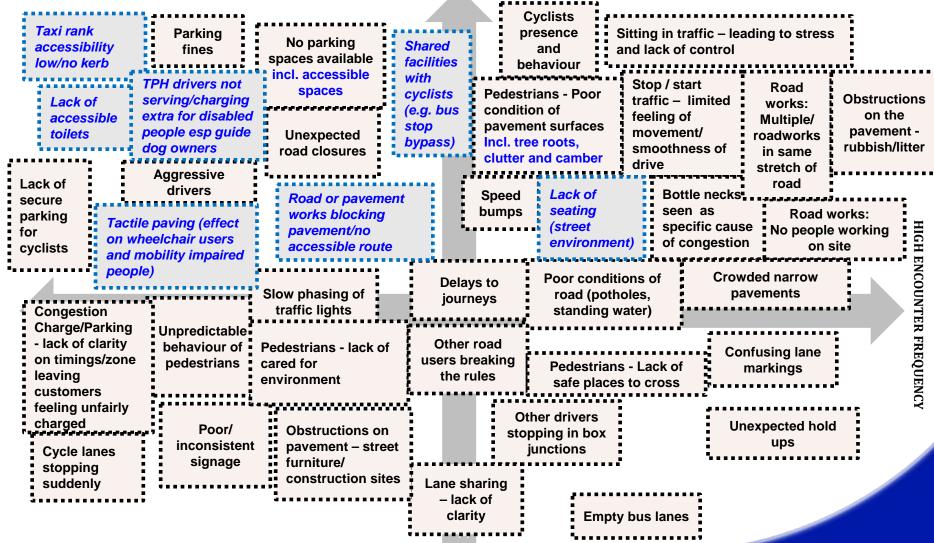
> Lack of seating at stations, stops etc.

Grab rails lack of visibility/wrong positioning

Buying a ticket for the first time



# Private Transport 'Pain' Points – disabled Customer pain point for disabled people New Customer pain point for disabled people Existing all customer pain point pain point





# Agenda item 2

Accessibility data and third party use

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#### TRANSPORT FOR LONDON

#### **CUSTOMER GROUP**

**Subject:** Accessibility data and third party use

**Date:** 24 March 2017

#### Customer and user objectives addressed:

- Continuously improve transport accessibility and accessibility information
- Help residents and visitors get more out of London, using our services

#### 1 Purpose and decision required

- 1.1 This paper sets out the current status of our open data for accessible transport and how it is currently being used
- 1.2 It details the steps we're taking to further improve the take-up and usage of this data among application developers and describes how we're developing new data sources to enable better planning services in the future.
- 1.3 The paper follows the recent discussions at the Customer Services and Operational Performance Panel (CSOPP) where this was discussed.
- 1.4 This paper is for DISCUSSION.

#### 2 Background and current status

- 2.1 Customers with accessibility needs find some of our rail networks particularly difficult to use as there are many stations which do not facilitate step-free access from street to train.
- 2.2 Information on which stations provide step-free access is found on various maps and guides, which is a good starting point.
- 2.3 However many customers would like to be able to plan their journeys, factoring in their accessibility needs, using the journey planning tools which those without accessibility needs make use of in such numbers.



- 2.4 The journeys planned by those with accessibility needs are further complicated by failures or unavailability of lifts, which may not be apparent if the maps and guides alone are followed.
- 2.5 TfL's Journey Planner, the most popular public transport planning tool in London, allows journeys to be planned making use of step free access, or tailored to a range of other accessibility needs.
- 2.6 TfL's Journey Planner plans around lift failures in real-time, fed by the London Underground Control Centre (LUCC).
- 2.7 The TfL website and TfL accessibility Twitter feed provide live information on any issues with station lifts.
- 2.8 For some time we have made available an API for Journey Planner, for use by third party app developers, which incorporates these features.
- 2.9 However while some application developers use this API there is little or no use of the accessibility features in their apps.
- 2.10 While the TfL website is the most used channel for public transport journey planning (used by 82 per cent of Londoners), third party apps are used by 42 per cent of Londoners.
- 2.11 At the recent CSOPP it was agreed we would seek to do more to enable accessible journey planning within Third Party apps, who benefit from the freely available data we provide, but are not serving this large and important set of customers.

#### 3 Steps to improve take-up of accessibility data

- 3.1 The data sets we currently make available for accessible journey planning are;
  - (a) TfL Journey Planner API, with step free access and other options
  - (b) Step-free tube map data
  - (c) Live lift availability data
- 3.2 The technology partnerships team is engaging with the top application developers to gain commitments from them to use this data and provide equivalent options to TfL's Journey Planner and accessibility service updates within their apps.
- 3.3 We are confident that the app developers will respond positively to this challenge. However if little progress is made we may need to create incentives or use other market levers to achieve the desired outcome.
- 3.4 The initial round of discussions with developers is now in progress and an update on this activity will be provided to the next Customer Group.
- 3.5 We also made a commitment to report progress on this regularly to the CSOPP.



#### 4 Developing new datasets and tools

- 4.1 TfL Online and London Underground are currently working on a proof of concept whereby stations are surveyed in more detail and Journey Planner is configured to carry more information about in-station interchanges, such as exact walking distances and numbers of stairs.
- 4.2 The data for this proof of concept has been gathered at two stations and is now being worked on by our Journey Planner supplier to build a working prototype demonstrating its use, this will complete in April.
- 4.3 After evaluation we will make a recommendation on whether this solution is useful, viable and should be rolled out to the rest of the network and included in the production Journey Planner.
- 4.4 We will also establish how best to provide this data to third parties.
- 4.5 Most bus stops are accessible, however we treat 100 per cent of stops as accessible in Journey Planner.
- 4.6 We are seeking to make a data feed available of inaccessible bus stops so we can make this available in Journey Planner, on stop pages and as data for third parties
- 4.7 We have been working for sometime with leading technology companies to enable instation mapping and Streetview. This activity has stalled due to various organisational and legal issues. These features in the most popular apps would make a great deal of difference to those with accessibility needs, and we are seeking to further push forward our efforts to reach agreement with these parties on providing these services to customers.

#### 5 Contact

5.1 Contact: Phil Young

Number: 0203 054 6335 Email: philyoung@tfl.gov.uk



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# Agenda item 3

Travel Demand Management programme

To note only

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## TRANSPORT FOR LONDON

#### **CUSTOMER GROUP**

**Subject:** Travel Demand Management programme

**Date:** 24 March 2017

#### Customer and user objectives addressed:

- Improve the reliability of transport services, including travel demand management
- Grow and improve transport services to meet population growth, and communicate the improvements
- Provide personalised, real-time, integrated information
- Train and equip our staff to deliver what customers and users want

#### 1. Purpose and decision required

- 1.1. This paper summarises the key work of the TDM team in 2016/2017, including the results of research into the effectiveness of the outputs
- 1.2. It also outlines the highlights of our delivery plan for the TDM programme in 2017/18, building on the recurring congestion strategy established last year
- 1.3. The case studies establish the efficacy of the programme, demonstrating the monitored and evaluated outcomes of TDM projects in 2016/17.
- 1.4. The Customer Group is asked to NOTE this paper.

#### 2. Contact

Contact: Stuart Reid

Number: 80184

Email: stuartreid@tfl.gov.uk

#### 3. Appendix

Appendix 1: TDM Case Studies

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# **Contents**

- Background, status and strategy
- Our delivery in the last year
- TDM Tracker research
- Our programme for next year
- Project case studies



# Background, status and strategy

- The TDM programme exists to reduce disruption and congestion on roads and public transport that results from major incidents, events and works and from demand exceeding capacity at certain times and places.
- Research shows that customers want more information and advice to avoid the busiest times and places. When they have the flexibility 51 per cent of London Underground customers would consider changing their journey to avoid crowds and 65 percent of visitors would consider changing their journey if they knew it would be crowded.
- We routinely achieve success in managing travel demand through information and communications around major and improvement works and large events, for example 14 percentage point increase in drivers avoiding works on the A406. In 16/17 we supported more than 50 events and works, some of the major ones are summarised on slide 5.
- Behaviour change pilots have shown that we can also influence customers to adjust their travel in response to everyday recurring congestion. Up to 6% of customers will travel outside the busiest times when provided targeted and relevant information and this information has now been rolled out to 92 stations.
- In addition, simple 'nudge' tactics provide our customers new and useful information that helps spread travel demand and encourages more active travel, for example a quarter of Londoners are aware of our walking Tube map and 36% say they have been encouraged to walk more as a result of using it.
- The first wave of TDM programme outputs focusing on recurring congestion were delivered in 16/17. Tracking research has found that 23% claim to have seen TDM communications around the busiest time to travel message, while 69% of those who saw the campaign made a change to their journey as a result re-timing being the most common change.

# <sup>4</sup> TDM Recurring Congestion Strategy

 15/16
 16/17
 17/18
 17/18+

 Stage I
 Stage 2
 Stage 3
 Stage 4

- Develop localised information and advice at key priority locations
- Deliver low level marketing and engagement activity

- Expand information and advice to cover more locations across the network
   Enhance marketing and engagement
- Target specific audiences

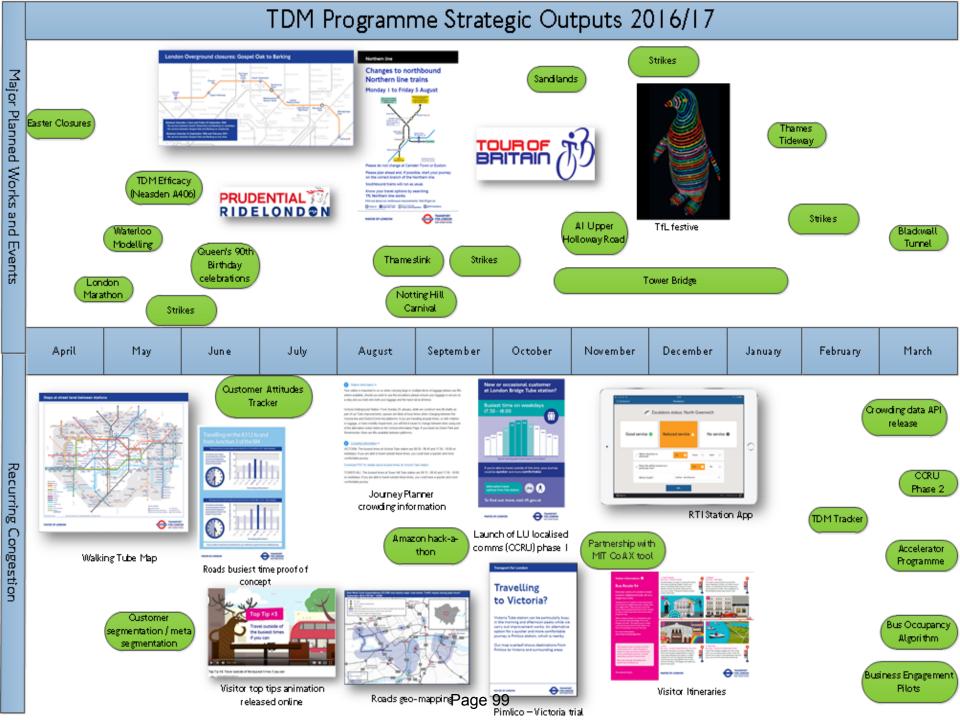
activity

- Launch strategic communications to further motivate audiences
- Provide an integrated view of the busiest times and places on the network
- Drive customers and road users to the information and advice

Information, advice and data alwayson

- Integrate information and advice into business-as-usual operations and digital travel tools including Journey Planner
- Visualise alternative options via maps and infographics
- Deliver real-time crowding and congestion open data and information





# 6 TDM Insights

In summer 2016, TDM established a bi-annual quantitative survey to track customers' attitudes and behaviours towards crowding and congestion, in order to assess the impact and opportunities for our programme.

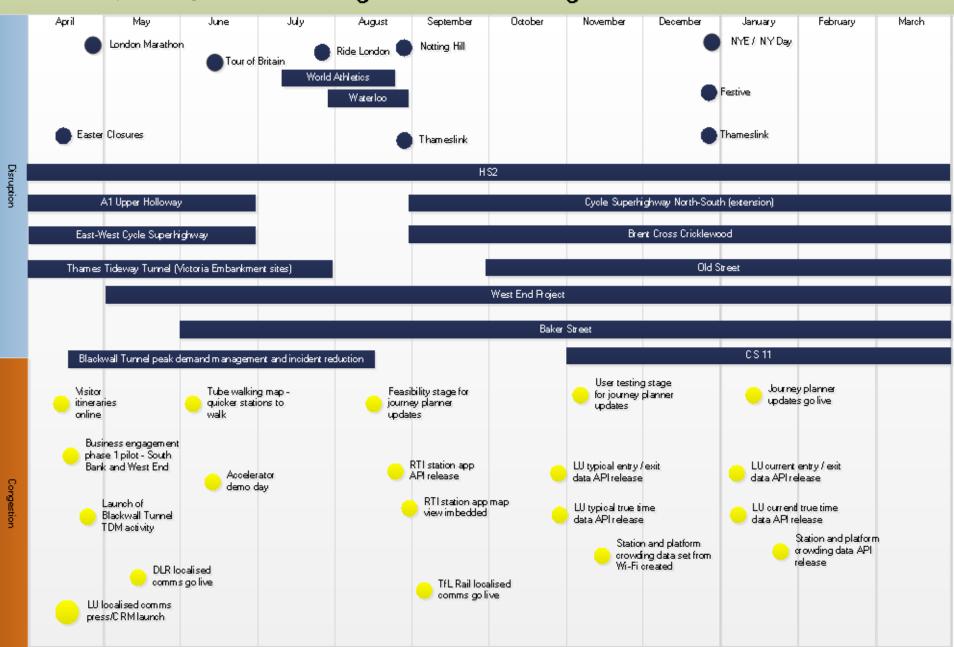
#### **TDM Tracker insights:**

- Survey results show that our TDM message of a 'quicker and more comfortable journey' is supported by the attitudes of customers who say that comfort/crowding is an important factor in changing journeys
- When customers changed a journey, 49% of the time it was to improve comfort/ reduce crowding this was the second biggest driver of change following time considerations which accounts for 60% of changed journeys
- Customers are most likely to want information about less crowded routes, as they have less flexibility on time and choice of service, particularly Tube and car users
- 23% claim to have seen TDM communications at Underground stations around the busiest time to travel message and 69% of those who saw the campaign changed their travel as a result
- Amongst drivers there is a strong underlying desire to change in order to avoid congestion. There is a willingness to retime and reroute but changing to another mode is less popular. 75% of car users say that they use at least one information source to plan their journeys before leaving
- Bus customers are planners and use multiple sources before leaving for their journey (74%). They are open to changing their behaviour, with commuters and business travellers most open and flexible to change
- Customers are positive about TfL's information provision 71% say that TfL provides information they can trust
- Customers requirements vary by age younger passengers are using online sources more during their journey and prefer using visual information at station or stops, whereas older passengers are more reliant on offline information sources on the network



TFL Restricted
All dates are subject to change

# TDM Programme on a Page 2017/18





## A 406 Neasden

To support the major roadworks on the A406 North Circular Road at Neasden in 2015-16, we provided enhanced information and travel advice through the integrated team process. The table below summarises these communications.

#### **Public**

- 22,000+ letters to residents and businesses within a half mile radius of the works
- 10.000+ leaflets distributed at Brent Cross. IKEA and Tesco
- Bespoke email sent to 468,000 road users -27% opened; also included in multi-modal email sent to 1,600,000 people -48% opened
- Twitter posts with 250,000 impressions before the start of works
- Travel advice web page with 10,000 views before
- the start of works
- Adverts in the Evening Standard and other local press
- Digital adverts online, targeted by IP address to relevant locations
- Face to face local engagement to residents and business on directly affected frontages
- Travel Ambassadors provided travel advice to bus passengers and motorists
- Signage at affected bus stops
- Hoarding on Heras fencing around works compound
- VMS on TfL and Highways England networks

#### Stakeholder

- Face to face meetings with:
- IKEA, Brent Cross, Tesco, Wembley Stadium (and the FA), Neasden Temple, Royal Mail, LB Brent
- Briefings to 17 local schools with emails/phone calls
- Press release and briefings to local media
- Weekly email bulletins:
- Taxi and private hire bulletin (47,000 recipients)
- Freight bulletin (10,000 recipients)
- Business bulletins (1,820 mailed, some also phoned and visited)
- Brent Borough Members Bulletin

#### Outcomes

- Our evaluation showed that as a result of better communications during the major road works at Neasden, around 14% of frequent drivers (over 1000 per day) changed their time of travel or route through the road works, causing a traffic flow reduction of 3%.
- The monetised social benefit of that behaviour change, set against the cost of enhanced communications, generated a benefit: cost ratio of over 4:1.
- Customer tracker surveys indicated that our reputation was also upheld through the works period.

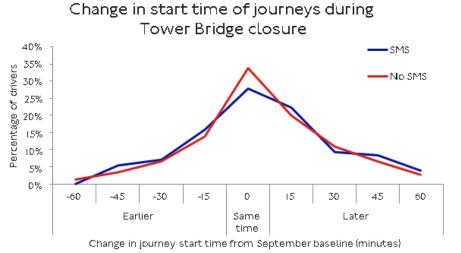


# Tower Bridge

- TDM worked with colleagues in the Roads Space Management team to agree objectives for our TDM campaign to support the City of London's closure of Tower Bridge in autumn 2016.
- Using a Customer Gain Point fund project, coordinated by Andy Emmonds in RSM Outcomes Insight & Analysis, we worked with Telefonica to monitor the behaviour change of customers and communicate directly with them using targeted SMS.

#### Outcomes:

- Our evaluation suggested that each of our objectives were met:
  - I) Drivers changed to a number of different crossings, in line with advice, spreading demand and preventing congestion hotspots building up;
  - 2) The diversion routes we promoted saw the largest increases in traffic flow; and
  - 3) During the AM peak (07:00-09:00), drivers receiving targeted SMS were 6 percentage points more likely to retime to avoid the worst congestion.



#### Additional benefits were:

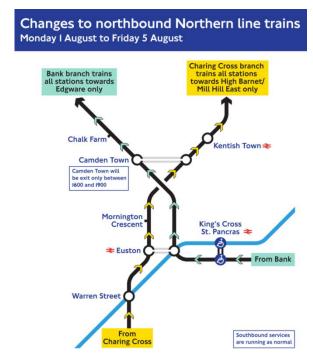
- 90% of media coverage was balanced, raising awareness without being a bad news story;
- Only 59 complaints were received (primarily about cyclists failing to dismount)
  despite an estimated 60,000 customers being directly affected by the closure every
  day.



## Camden Points

(Saturday 30 July - Sunday 31 July; Saturday 6 - Tuesday 9 August, Saturday 20 - Tuesday 23 August

- Five planned and four unplanned weekday changes to service patterns on the Northern line at peak times.
- Modelling predicted that without a travel advice campaign, 15,500 people would try to change to their correct branch at Camden Town each evening peak, causing the station to go 'non-stopping' as there is only capacity for 10,000 to change.
- Data also indicated that the majority of customers wait for the correct train
  to either Edgware or High Barnet ,which meant we needed customers to
  start their journey on the correct branch to avoid interchange altogether.
- Based on this data and operational knowledge TDM identified key stations and developed targeted and simple travel advice as well as using creative graphics to explain these complicated changes and help customers complete their journeys;
- When the works unexpectedly overran, affecting Monday and Tuesday 8 & 9 and 22 & 23 August, we tailored the campaign at short notice and deployed it on the network in time to both raise awareness and manage demand.



#### Outcomes:

- The station did not go non-stopping at any point during the closure, showing the TDM campaign persuaded passengers to change their behaviour.
- We are examining anonymised customer travel records to understand who made what changes to their travel behaviour



# Crowding Communication on Rail and Underground (CCRU)

- Following the successful trial at 23 Tube stations in February 2016, which achieved a 3-5 per cent shift in customer behaviour, in September 2016 TDM focused our localised communications around a further 11 stations in the South-East London and Jubilee line corridor.
- Using localised busiest time station data and taking on board lessons learnt from the past trial, the communications encouraged customers to travel outside the busiest times and consider alternative routes and methods of transport where available, through a range of different channels and visuals

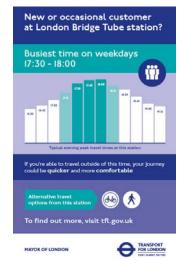
#### Outcomes:

Based on the autumn 2016 TDM tracker:

- 23% claim to have seen TDM comms around the busiest time to travel message and;
- 69% of those who saw the campaign changed their travel as a result









# Oxford Circus DMI: localised travel advice & analysis

- On a typical weekday during the evening peak, around 10,000 customers pass through Oxford Circus every 15 minutes. Seasonality data also shows that the station's busiest time is the run up to and during the festive season (late November to early January) when there is an average 7 per cent increase in customers.
- To support the station operations and a wider package of local customer communications, in December 2016 we trialled the provision of the travel advice and information via the Dot Matrix Indicator (DMI) at the entrance to the station.

#### Outcomes:

- Data analysis and research for the period of the trial showed that in line with the travel advice given Bond Street and Tottenham Court Road stations saw increased entries during closures at Oxford Circus, when the DMI messaging and additional communications including in-station vinyls were displayed
- The tiail was rolled on to become Business as Usual and we will continue to use the DMI channel as a timely source of customer information which amplifies the other busiest times messages customers are exposed to



# Walking tube maps

• We produced and released the 'Walking times between stations' map online in late 2015. Following this, a map indicating the number of steps between stations was released in 2016 along with a list of journeys which could be quicker to walk than to take the Tube.

#### Outcomes

- TfL research ('Attitudes towards walking') indicated that a quarter of Londoners are aware of TfL's walking Tube map and four in ten of those aware admit to it having changed their perception of the distances between stations. Over a third (36 per cent) said that the map has encouraged them to walk instead of taking the Tube. Recent statistics below indicate the number of downloads from tfl.gov.uk additionally the map has been widely shared on social media:
  - Walking Tube map (from Nov 2015): 188,613 downloads
  - Steps version of walking Tube map (from Sept 2016): 44,058 downloads
  - Journeys that are quicker to walk (from Sept 2016): 19,609 downloads







### Agenda item 4

Bus revenue generation

To note only

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#### TRANSPORT FOR LONDON

#### **CUSTOMER GROUP**

**Subject:** Bus Revenue Generation

**Date:** 24 March 2017

#### Customer and user objectives addressed:

• Help residents and visitors get more out of London, using our services

#### 1 Purpose and decision required

- 1.1 The purpose of this paper is to update on the integrated communications programme that has been developed to help increase bus patronage. This activity will initially focus on a hot house communications approach within two areas—Barkingside and Hayes.
- 1.2 This paper is for NOTING.

#### 2 Background and current status

- 2.1 There continues to be a reduction in demand for bus journeys, particularly in central London where other forms of public transport such as London Underground and London Overground and walking and cycling can offer more efficient or healthier options. Bus patronage and therefore revenue had declined against a backdrop of broadly flat demand over the last few years. Increased congestion in the last three years has resulted in lengthened and less predictable bus journey times, a key customer need.
- 2.2 Whilst within London contributing factors have been the extensive road investment programme and increase in delivery and construction vehicles affecting bus speeds, the decline is representative of trends experienced at a national level.
- 2.3 Whilst operational improvements are planned, including the implementation of more bus priority measures, in the short term, communications activity will be focussing on areas within London where the Bus network has not been disrupted by significant roadworks and in areas identified as having potential for growth. The first of these areas is Barkingside from April followed by Hayes from July for six months and enhanced customer information in central London. Work is underway to identify other areas for future roll out of the communications activity and if the additional communications support proves to be successful at increasing usage.



- 2.4 The attached presentation outlines the plans for activity in Barkingside, Hayes and central London covering: enhanced customer information, bus livery, multi-channel advertising, door drops, customer emails and face to face activity.
- 2.5 In addition short term wins for other customer information products for Tube and Rail will also be implemented.
- 2.6 £2.5m funding for the programme has been identified through savings made across CCT in 2016/17 and will be reported as an overspend for 2017/18. £0.5m of funding has been secured from existing 2017/18 marketing budgets, now transferred to CCT as part of London Buses marketing spend.
- 2.7 This is in advance of a pan TfL transport campaign to increase usage across all TfL public transport and encourage more walking and cycling services this summer. This will potentially be under the 'active travel' or 'healthy streets' banner and could include incentives and discounts. It is subject to research and funding.

#### 3 Key outcomes

**3.1** Hard and soft measures will be used to evaluate the activity including: analysis of the ticketing data, tracking research measuring awareness, intention to use and frequency of use amongst local residents in the trial areas.

#### 4 Contact

Contact: Mandy Courtney Number: 0203 054 6238

Email: mandycourtney@tfl.gov.uk

#### 5 Appendix





## **Agenda**

- 1. Implementation Plan overview & programme delivery timelines
- 2. Buses Integrated communications and operational response for two 'hot house' areas: Barkingside, Hayes and central London routes (March/April Dec)
- 3. Pan public transport integrated communications to increase revenue (June onwards)
- 4. Marketing support ideas prioritisation criteria: direct revenue, reputation, speed to market (1-2mths, 3mths, 6+mths)
- 5. Funding
- 6. Next steps and timings





#### Buses: Barkingside Hot House April - Sept

Phase I - I<sup>st</sup> Hot house (new customer information, livery, advertising, PR, door drops, face to face, stakeholder, CRM)

Buses: Hayes Hot House July-Dec

Phase 2 – 2<sup>nd</sup> Hot House (new customer information, livery, advertising, PR, door drops, face to face, stakeholder, CRM) Pan Public transport - June onwards

Phase 3 -Pan Public transport communications

Livery Phase I – end March subject to livery design approval (3 routes central London/Barkingside)

Livery Phase 2 - 1 April (3 routes)

Livery Phase 3 - 8 April (7 routes)

Livery Phase 4 – 15 April (2 routes)

Livery Phase 5 - 30 April (14 routes)

Pan public transport research and campaign development

Hot House Evaluation

Hot House Evaluation

Pan Public transport Evaluation

Programme Delivery	What we are doing now	When will customers see this
Route information applied to external bus livery	Barkingside and central London (routes 128, 129, 19)	From 20 March
(326 buses by end April)	Central London (routes 13, 113, 139)	From I April
	Central London (route 388), Barkingside (167, 169, 247, 275, 462), Hayes (427)	From 8 April
	Outer London X26, 607	From 15 April
	Hayes (90, 140, 195, 350 , 607, A10 , E6, H98 , N207, U4, U5, U7, 507) & central London (521, 2)	From 30 April
Enhanced customer information - maps	Updated local spider maps, trialling new 'Tube' map, illustrated map	April
	Illustrated bus, Tube & Rail map, simplified bus area bus map	May
CRM	New weekend works and closures template with service open messaging	Early May
	Sharing of bi-monthly events email	May
	Targeting lapsed bus users and Tube and Rail customers; growing the database (pan London route specific)	On-going
Integrated comms	Local area advertising , CRM & promotion, door drop, face to face activity targeting residents and businesses	Mid – end April (Barkingside) July (Hayes)

Programme Delivery	What is in development	When it will be in market
CRM	New weekend works and closures template to include information on services that are open	spring
Enhanced customer information (pan public transport)	Themed route maps based on interests	End April/May
	Continuing your journey map enhancements	July
	Highlighting popular destination	Mid April (Waterloo bus shelter), from Sept at other locations
Integrated comms	Adding a call to action to existing messaging to encourage trial	April
	Promoting public transport as an alternative to the T charge	October
Partnerships	Exploring options with L & P and Visit Britain (Visitor market)	March

Programme Delivery	What we are testing with customers	When it will be in market
Customer information	New E-Sub design	w/c 6 March
	E-ink trial, in bus digital information	On-going
Customer research	Focus groups to test propositions to encourage trial and switch from cars as well as incentive ideas testing	13 March
	Tracking awareness of hot house activity and impact on behaviour (in addition to ticketing information)	May-June (Barkingside)



## Barkingside/Hayes – hot house areas

Routes	Number of buses on route	tbc)	Frequency of buses per hour	Percentage of buses in the area	Decks
Barkingside – (April-Sept)					
128	15	11	5	18%	DD
150	14	11	5	17%	DD
167	7	5	3	9%	SD
169	14	10	6	17%	DD
247	11	8	6	13%	DD
275	13	10	5	16%	DD
462	8	6	4	10%	SD
Total buses	82				
Hayes – (July – September)					
90	15	11	6	9%	DD
140	29	21	8	17%	DD
195	15	11	5	9%	SD
350	8	6	5	5%	DD
427	22	16	7.5	13%	DD
607	20	15	6	12%	DD
A10	5	3	5	3%	SD
E6	13	9	6	8%	SD
H98	16	12	7.5	9%	SD
U4	14	10	7.5	8%	DD
U5	11	8	5	6%	SD
U7	5	3	2	3%	SD
Total buses	173				

#### **Central London routes**

Routes	Number of buses on route	Liveried buses (vols tbc)	Frequency of buses per hour	Decks
507	17	tbc	10 (interpeak), 15 (peak)	SD
521	34	tbc	6 (interpeak), 20 (peak)	SD
2	29	21	8	DD
19 draft	31	23	7.5	DD
13	34	25	TBC (due to new operation)	DD
113	31	23	TBC (due to new operation)	DD
139	82	tbc	TBC (due to new operation)	DD
388	20	tbc	6	DD
Express/limited stop routes				
X26	11	11	2	DD
607	22	17	6	DD
Total buses	311			

Implementing a gold, silver, bronze approach e.g. livery without ad frame (no commercial advertising), with ad frame (no commercial advertising) and bronze with commercial advertising and some route information

<sup>10</sup>On Bus livery as point of sale (for routes within Barkingside & Hayes and selected central London routes) – draft visuals

 Integration of colourways with other customer information touchpoints also in development e.g. mapping, bus stop tiles and bus blinds







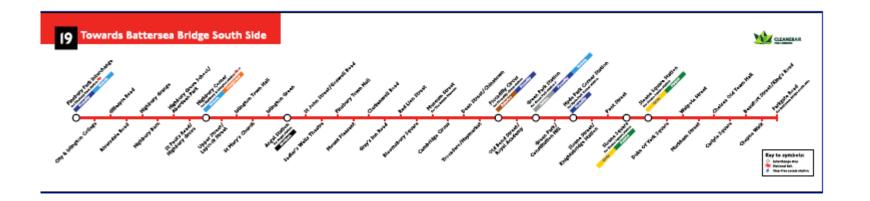
Target -75% of buses per route will be re-branded



П

# Example interior linear diagram showing all stops along a route





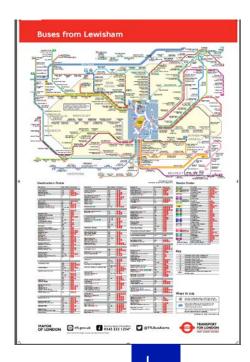
## <sup>12</sup>Customer information

- Update local spider maps to show larger geographical area (blue Legible London tile)
- 2. Trial a new 'tube' map style local area and network map
- 3. Trial illustrated bus stop map

#### Time to Market:

Update local spider map — April Trial 'tube' map local area network map — April Trial illustrated bus stop map - April

Pan public transport: Tube line of route maps, available to download with point of interest from each station. Continuing your journey maps will be updated with more local points of interest









## **Bus Station Improvements**

- Implement the new customer information hierarchy which aims to give customers the information they need at different stages of their journey
- Bus station already has digital real-time screen

Time to market:
Survey Bus Station Feb 17
Update printed information: March 17

Pan public transport: Introduce Station information zones with updated Continuing your journey. Already proposed in London TravelWatch response.



Example approach

Quick win



### 14 CRM emails

- Targeting lapsed Bus users and car drivers within the core area to remind them of services and any improvements
- Using a combination of service and marketing opt ins and testing effectiveness
  - 2,186,839 emails sent since Sept '16 targeting lapsed users of which 664,462 were opened (average open rate 30.3%)
  - Bus hopper email initial results
    - 21% (173.5K) contacted made 1 x journey by bus
    - 16% (136K) have made 2-3 journeys by bus
    - 11% (92.5K) have made 4+ journeys
- Use of TfL data and cold data
- Ensuring Tube and Rail CRM targets lapsed users
- Keep growing the database. Already promoting by Twitter, new travel alerts offer available from April. Working with the Contact Centre to capture and share customer contact details
- Develop new weekend works and closures template and this could be used to inform people what is open.
- Encourage sharing of bi-monthly events email.









## Marketing

- Local area advertising highlighting the relevant places that the bus routes go to and the benefits:
  - o Supermarkets, Shopping centres, Airport, Tube/Rail stations, Hospitals, Retail parks
  - o Bus services frequency, capacity, route extension, new buses
  - o Ease of use vs. driving to locations
  - o Value fares message
- Creative strategy incorporates
  - An over arching line that acts as a directive to encourage people to reconsider bus use
  - Specific sub line highlighting the key benefit / route that would get them to reconsider
  - o Direct call to action that would drive people to plan their journey
  - o Update to existing improvements creative
- Targeting lapsed bus users living / working within 1000m of a bus route and all car users
- Extend to Tube and Rail messaging reminding customers of the small investments that make a big difference to their journey e.g. your station is now cleaner and brighter, lifts and escalators have been improved, your station is now step-free.





## <sup>16</sup> Marketing: media channels

ROLE FOR IN JOURNEY MEDIA

Highlight the great bus services in the area to increase consideration to switch journeys to bus

RECOMMENDED CHANNELS



ON SYSTEM
BUS / LU DR CIRCUIT
BREAKS



ROADSIDE FORMATS
\*SUBJECT TO AVAILS



LEISURE OOH
\*SUBJECT TO AVAILS



**SMS ALERTS** 

HOW WE WILL USE THIS CHANNEL

THE ROLE OF CHANNEL

BUS CIRCUIT BREAKS

NEAR MAIN SHOPPING

HUBS

OUTSIDE FACING LU DRS

PROFILE AMONGST THE
LOCALS

GEO TARGETED TO 500M RADIUS OF BUS ROUTE

TARGETING LOCALS TO
USE THE BUS FOR THEIR
NEXT JOURNEY

PANELS LOCATED WITHIN
LOCAL FACILITIES
(I.E. SUPERMARKETS,
HOSPITALS, GYMS)

PROMPTING PEOPLE TO
USE THE BUS FOR THEIR
NEXT VISIT

SMS TO PROSPECTIVE BUS
USERS WHO ARE VISITING
LOCAL FACILITIES

PROMPT PEOPLE TO
RESEARCH BUS ROUTE
WITHIN AREA



## <sup>17</sup> Marketing: media channels

ROLE FOR OUT OF JOURNEY MEDIA

#### Give timely, relevant reminders to take a journey by bus

RECOMMENDED CHANNELS



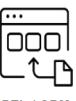
**LOCAL PRESS** 



GEO-TARGETED DIGITAL



**FACEBOOK** 



BTL / CRM

HOW WE WILL USE THIS CHANNEL 25X4 DISPLAY ADS FIRST IN FORMAT WITHIN LOCAL PAPERS

PROFILE AMONGST THE

LOCALS

TAPPING INTO PEOPLES
HABITUAL ROUTINES
THROUGH BEHAVIOURAL
TARGETING

PROMPTING PEOPLE AS

CLOSE AS WE CAN TO THEIR

JOURNEY TO USE THE BUS

FOCUSING ON WEEKENDS
AND EVENINGS AHEAD OF
DISCRETIONARY JOURNEY

PROMPTING PEOPLE IN
WEEKENDS/EVENINGS TO
USE THE BUS

MAILBOX DROPS TO RESIDENTS WITIN CLOSE PROXIMITY TO BUS ROUTES

CRM

PROMPTING PEOPLE WITHIN

CLOSE PROXIMITY THROUGH

ONE TO ONE COMMUNICATION



## PR – local support



- Press release with photography to mark the launch of the new livery and maps
- Work with local media to secure image-led features 'first place in London to trial innovative maps'
- Image-led social media activity
- Create a simple, 30-second social media video to communicate the key messages, with a zoom-in look at the new-style map
- If there is to be a 'free bus day' or similar work with local media to promote it and create a 'buzz'
- Continue to promote local improvements and examples of good customer service to local media



### Stakeholder communications

#### Barkingside 'hot-house'

- Begin conversations and develop relationships with local shopping centres in Ilford and Romford with a view to working together on encouraging increased bus usage – potential for deals, advertising etc.
- Distribute 'Travelling in London while pregnant or with a buggy' leaflet to NCTs and Mumsnet groups in local boroughs

#### Hayes 'hot-house'

- Local Business Improvement District in Ealing using existing relationship to promote people coming to their areas – we benefit from increased bus revenue and they benefit from additional footfall. We would see how a local business part of the BID (whether café or something else) might provide something for free when they use the bus to get there.
- Proposed BID in Uxbridge this would be longer-term





## 20 Comms with Bus Operators and drivers

- To raise awareness of what we are doing to promote the bus services in the area
- Incorporate 'know your area' into the PA on-bus training sessions (early April)
  - This would include ensuring bus drivers can answer questions about the area they drive in and actively let customers know the stop they require to get to a particular destination
- Opportunity to reinforce 'Hello London' customer focus
- This will be achieved through:
  - o Initial 'warm up' email to Communications / Training Managers stating the high level objective (March 2017)
  - o Monthly message to MDs MDs can use to feed into their local messages
  - Meeting with Garage team (Garage Manager, Supervisor, Driver Mentors, Champions, Controllers,
     Comms & Training Managers) to gain buy-in and ownership (March 2017)
  - o Posters distributed to garages
  - o Local operator comms channels, eg newsletters, Intranet, posters
  - o Driver drop in sessions at garages (early April 2017)
- Garage Open Day at Stagecoach Barking (May / June)



## **Employee communications and engagement**

#### Objectives:

- Ensure staff are aware of the revenue generation work on buses
- Push the bus agenda internally and help staff understand the current situation and feel empowered to speak up on behalf of buses
- Raise the internal profile of buses alongside other modes
- Share the new livery and maps with staff, especially those who may live/work in the area
- LU staff Increase knowledge of the local bus services for onward journey information (initially Barkingside staff)

#### Audience:

- All TfL staff
- Senior leaders

#### Channels:

- Source article based on press release
- Head Office posters
- Upfront article (dependant on Upfront schedule for timing)
- Liaise with LU comms colleagues to share with local LU staff





## <sup>22</sup>Evaluation through use of hard data both for 'hot house' activity and at a pan London level

- Using ticketing data
  - Understanding impact of the themes on patronage by exploring changes in customer behaviour
  - Identify changes in intensity, regularity and frequency of use.
  - Make comparisons to a control area and/or customer group to measure the scale/ direction of the change.
  - Consider the impact on revenue
  - Consider the impact across the entire programme and at an individual intervention level
  - Measure the effectiveness of the email campaign by analysing the travel of contacted customers by their level of engagement, open/click through.
  - Some of this will be difficult to identify directly from Oyster/ CPC. May require use of existing surveys to enhance or complete our understanding.
- Using customer research
  - Assess the impact on CSS scores for LU, DLR, LO and Tram modes



## **Customer research & insight**

- Setup tracking in the two 'Hothouse' areas of Hayes & Barkingside to establish if there is any uplift in revenue generation as a result of the campaign, specifically:
  - To assess any 'intention' to use the bus more amongst customers on the key routes (pre)
  - Awareness of the branding/livery & customer information/maps along the key routes (during/post)
  - Assess any (claimed) behaviour change as a result of the campaign on these routes (during/post)

#### **Barkingside:**

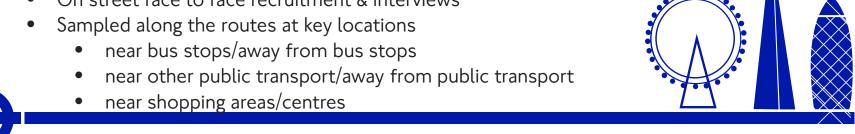
- A 'pre' wave March '17 in Barkingside
- A wave 2/3 months into the trial

#### Hayes:

• A wave 2/3 months into the trial

#### Across both areas, the method would be similar:

- 600 interviews; 300 pre / 300 during
- On street face to face recruitment & interviews



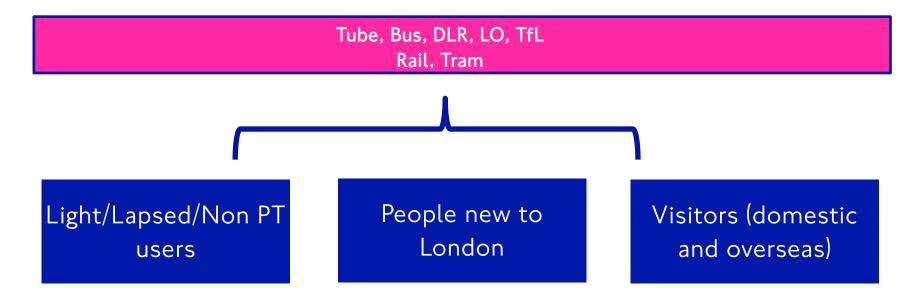


## From June 2017: New Pan public transport communications strategy

Proposition testing amongst car users to test motivational messaging to encourage behaviour change and role of incentives e.g. Take one less car journey for cleaner air in London (exploring alternative options e.g. healthly lifestyle links)

- Incentives driven by frequency of usage
  - Explore option to 'create a moment' e.g. free limited trial

- Penalties for polluting vehicles
  - Car free days



## **Supports the Healthy Streets approach**

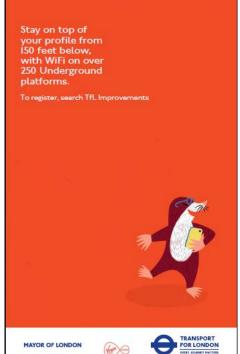
10 Healthy Streets Indicators



<sup>27</sup>Maximising existing public transport improvements messaging by adding a strong call to action to encourage trial e.g. 'another great reason to travel by......' ('stamp' below is draft not final approach)









Win Win

## <sup>2</sup>Leveraging air quality alerts and emissions charging 'stick'

 Support with new advertising message and CRM activity to encourage switching to public transport when high/very high air quality alerts are triggered to support on –system messaging

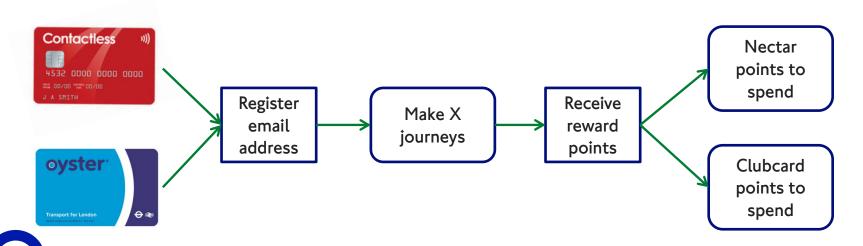
 Promoting public transport around the launch of the 'T-charge' (Emissions Surcharge) in Oct and subsequently for ULEZ







- <sup>29</sup> Example partnership approach: Encourage more journeys with incentives partner with major retailers/loyalty schemes, financial services and O2 priority moments.
  - Secure partnerships to reward customers who make x number of journeys
  - Customers register Oyster or Contactless card and provide reward card details.
  - Customers receive reward points from loyalty scheme
  - I.e get Sainsbury/Tesco loyalty points
  - Major retailers deliver on their environmental commitments
  - Potential to incentivise off peak journeys ie double points off peak
  - Builds our customer database
  - Work with L&P and Visit Britain (both Bus and Public Transport)



# On Bus livery as point of sale (for routes outside hothouse area)





Draft design in development

Vinyl on side of LU, Overground and DLR trains and Tram to mirror the information from the line of route maps with things to do close to each station.





#### **3Customer Information**

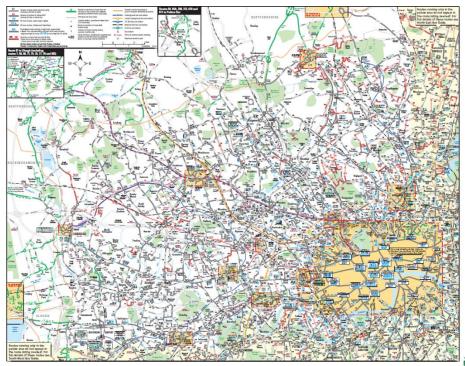
- Illustrated bus route, select 20 cross London routes. Illustrated tube line map i.e. Victoria line.
- Speed up trial of in bus digital information
- Speed up trial of e-ink
- Secure funding for roll out of new E-Sub design
- Use E-Sub free text to inspire additional journeys





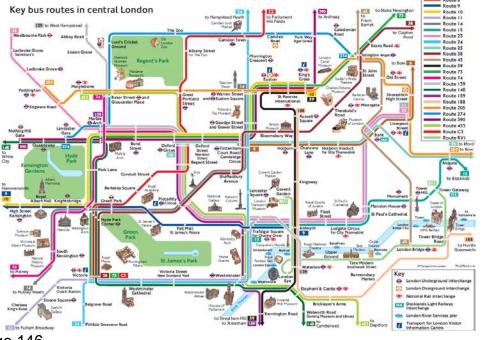
### Customer Information – simplified area map

#### From this



Inner and Outer London versions of the Tube map and Tram, LO and DLR maps with places to visit highlighted.

#### To this



Page 146

- New bus, Tube, Tram, LO and DLR themed route maps to see more of London:
  - Street Art
  - Food
  - Markets
  - Film Locations
  - Pubs etc
  - Free/cheap things to do
  - Family things to do

Maps will include local Tube or Rail stations interchanges where customers can join the route from other modes.



# Highlight popular options at Bus Shelters and LU and Rail station platforms





# Highlight popular options at Bus Shelters and LU and Rail station platforms

Roll out attraction signage at more stations to help customers plan additional journeys and visitors/newbies to navigate the system





Use scrolling text on DMIs to give up to date and relevant information about attractions and events



#### **CRM**



- Targeting lapsed users and car drivers and other public transport users with improvement messages
- Support improvements through use of TfL database and cold data esp to reach car drivers
- Use tactical messaging opportunities e.g. Identify major shopping centres in Outer London (better by bus than car, one less journey)
- At bus stops posters on specific routes highlighting the benefits of shopping by bus/PT
- In bus posters highlighting the benefits of shopping by bus/PT
- Proactive/responsive emails to customers to give them TDM-style inspiration, i.e "It
  is 30 degrees this weekend. Travelling to the park may be busy. 40% of our network is
  now air conditioned. Plan your journey at ... "





#### PR

#### **Environment**

- Press release to launch 'one less car journey a week' initiative, facilitate interviews. Also secure features on drive time radio – perhaps incorporating an element of debate?
- Work with air pollution campaigners to help spread the message for us, eg Asthma UK
- Infographic-driven social media campaign, highlighting reduction in air pollution from reducing car time by one journey a week
- Comparison information between car and other transport options to demonstrate the eco credentials of Public Transport as well as the average cost to customer
- Reinforce messaging when air pollution alerts are issued





#### PR

#### Improving customer information

- Bus map redesign: create PR campaign similar to the successful Night Tube map launch.
- Social media campaign highlighting how quick it is to navigate the bus network with revised information. Eg, videos to follow three new Londoners as they navigate the network for example a student, someone who has just moved to London from elsewhere in the UK for a job, someone who has just moved to London from abroad (#LondonisOpen)
- Create and promote a short social media film to support new-look maps and information

#### Love your bus

- Partnership with BBC Music day on 9 June: BBC singers to take a bus to perform at key London locations ahead of a Radio 3 'Tune In' broadcast
- Press release to launch new 'routes' eg tourist route, 'foodie' route, etc
- Launch events to support the introduction of the new differentiated routes
- Capture engaging photographs of the new differentiated routes, to share with national and local press for features
- Explore opportunities to work with Thrillist or Buzzfeed to create a 'viral'-style social media video for the 'foodie route'

#### Local media briefings in outer corners of London

- Depot tour behind the scenes tours of DLR, Tram, LO and Tube
- Staff interviews/profiles



#### TfL Online

#### Improving customer information

- Update the Journey Planner to use live predicted arrivals times, in addition to timetables (based on proximity to journey time)
- Work with application developers to get a consistent approach to live journey times
- Reinstate bus route/stop finder by postcode on TfL's website
- Launch Facebook/Twitter bots with primary use cases for buses. With focus on human language and self service, these bots aim to help customers with their journeys
- Introduce email sign up tick box for pan-TfL marketing campaigns on the email sign up page
- Seek to improve buses disruptions information on the website
- Leverage existing personalisation features to indicate disruption information for bus routes
- House allocation of website advertisements can be used to promote bus (and other modes)
  usage
- Support marketing initiatives through content on the website
- Support physical system changes (livery etc.) by reflecting appropriately on website
- API feed product differentiation routes to be added to API
- Encourage sign ups to Twitter push notification on Tube, DLR and LO
- Partnerships with attractions/events to link customers to Journey Planner to plan their journey in advance by Public Transport, i.e. "It's easier to get their with TfL"



### <sup>40</sup> Stakeholder communications

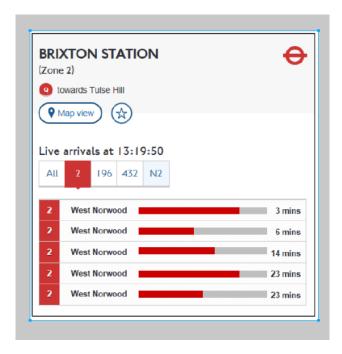
- Night Tube showed businesses are very positive about us promoting them product differentiation on routes would be welcome
- Follow Ealing BID example with others what incentives / loyalty cards do they have we can tap into for 'I less car journey'
- Encourage visitors to use specific routes based on attractions, foodie hotspots etc. this is already taking place for route 94 during Easter
- Possibility of 'cheaper to use bus than parking' but would need to work with local shopping districts to ensure revenue lost via parking is matched by revenue increase (use Town centre bus use research)
- Promoting events with cultural sector 'off the beaten track' tourist attractions accessible via bus from Central London i.e. Geffrye Museum, Horniman Museum
- Supporting new Londoners by explaining bus network, including businesses, universities, Job Centres and refugees
- Develop leaflet for NHS trust transport teams encouraging people to use bus to access hospitals
- Push travel information for parents and families key sector using cars at weekends to travel e.g. via Mumsnet



#### Travel demand management

- Using data to inform messaging and information on the web to encourage footfall e.g.
  - o Typical journey times
  - o Actual journey times
  - o Crowding/capacity availability e.g one of the possible outputs from our data road map could show the crowding levels on the next five buses to arrive at a stop (example graphic) for publication on the website and through the API.
  - o Changes in passenger numbers
  - Frequency of use by individuals

This forms part of a wider longer term "data road map" being put together at a pan modal level







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#### **Visitors**

#### Online improvements

- Improve customer journey for visitors on TfL Website
- Build on current partnerships with L&P to encourage greater use of Bus & PT
- Work with L&P to build PT functionality on their App

#### Media partnerships

Explore media partnerships to promote new styles of customer information i.e. route maps

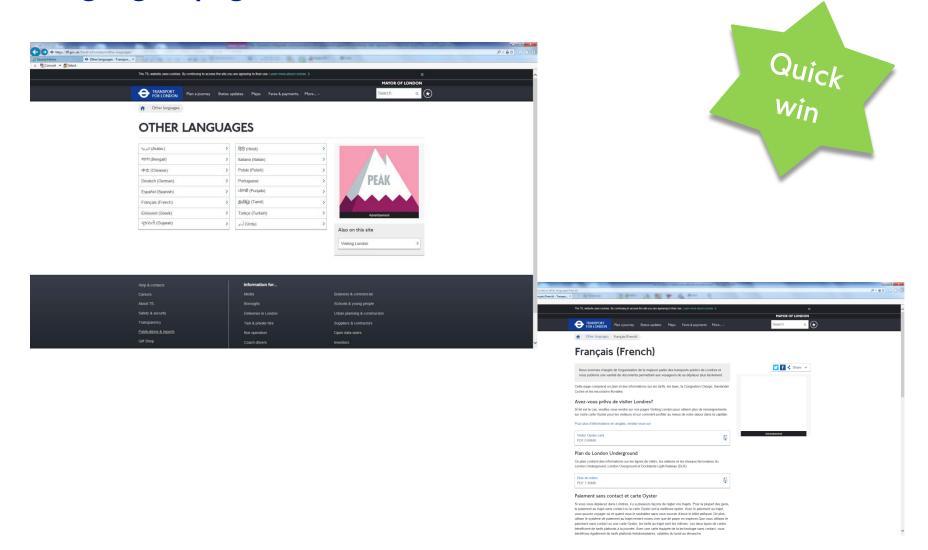
#### **CRM** opportunities

Build a visitor database to enable push messaging to visitors

#### PR opportunities

- Investigate cross-promotional opportunities with key travel companies, eg: TripAdvisor, Airbnb, Time Out, VisitLondon, Lonely Planet, Fodors, HostelWorld, CityMapper etc
- Look to secure new transport features from media with top SEO rankings, eg: Telegraph Travel, Guardian Travel, Buzzfeed, Google travel, The Culture Trip, US News Travel, VisitLondon etc
- Explore opportunities to create social media material that we would share with our key partners (eg hotels, airlines etc). Perhaps we could create joint content with London&Partners?
- Ensure inclusion in the 2017 London Autumn Season campaign (VisitLondon)
- Idea: partner with City Hall/London & Partners to create a simplified tourist map of London, linked by buses, such as they've done in Dublin with the "Dubline".

Adding Bus information including fares to the 'Other Languages' pages





### <sup>45</sup> Love Your Bus

#### Improves reputation with indirect impact on revenue

Ideas to support theme	Reputationa lly positive	Revenu	enue Impact Opps for other modes		Time to	set up & be in	in market		
	(1-3)	Direct	In-direct	other modes	I-2 mon	3 mon	6+ mon		
Social media/YouTube videos already in market	3		X	X	X				
Imbue buses with a personality (not another YOTB) — package of fun to raise profile e.g. local events (name a bus, bus dept staff engagement, drivers going into schools)	3		X	X	X				
New product route level differentiation — scenic, heritage, shopping, foodie routes	3	Χ		Χ		Χ			
USPs of buses — Productive journeys for mums, students etc. with wifi access	1-2		X	X	X				
Push more to get every good news story out e.g. local route reliability stories, overall good news reliability at a borough, town level, serving a hospital etc.	2-3		X	X	X				
Target lapsed, existing, car users. Use CRM, Countdown signs, PR stakeholders	3		X	X	X				
Clearer narrative for buses in relation to overall improvements plans and the balance between road works, bus reliability, prioritising space for buses vs cycling	1-2		X		X				
Raise internal profile of buses	2	Page '	159 <sup>X</sup>		X				

### <sup>46</sup> Environment

#### **Quick wins**

Ideas to support theme	Reputationa lly positive	Revenue Impact		Opps for other modes	Time to	Time to set up & be in marke		
	(1-3)	Direct	In-direct	other modes	I-2 mon	3 mon	6+ mon	
Bring together public transport, walking, cycling and healthy streets	2		X		X			
One less car journey a week pledge, take public transport instead	3	X		X	X			
Bus as the enabler. E.g. weekend leisure/shopping trip and user partnership opportunities to link journey to promotion incentives linked to destination e.g. take buses to Westfield and receive coffee/money off voucher	3	X		X	X (CRM)			
Pilot having ambassadors helping people with shopping to get on board buses	3		X	X	X			
Leverage 'carrot and stick' using air quality alerts and emissions surcharging/ULEZ to encourage use of PT	3		X	X	Χ			
Green ticketing – pay a small premium and TfL reinvests 100% into our environmental agenda	2		X	X			X	
Electric bus — charge your device during your journey	2	Χ			Χ			
Differentiated produce for visitors to increase yield and cross modal linkage e.g. cycle hire	3	X	100			X		
incentives linked to destination e.g. take buses to Westfield and receive coffee/money off voucher  Pilot having ambassadors helping people with shopping to get on board buses  Leverage 'carrot and stick' using air quality alerts and emissions surcharging/ULEZ to encourage use of PT  Green ticketing — pay a small premium and TfL reinvests 100% into our environmental agenda  Electric bus — charge your device during your journey  Differentiated produce for visitors to increase yield and cross modal linkage e.g.	2		X	X	X	X		

#### <sup>47</sup> Information

#### Improvements to bus exterior take a long time – quicker wins elsewhere

Ideas to support theme			Opps for other modes	Time to	set up & be in	market	
	(1-3)	Direct	In-direct	other modes	I-2 mon	3 mon	6+ mon
Update Journey Planner to use live bus arrival info	3		X	X			X
Demystify buses making it clearer where they go, how to use them, how much they cost. Key for irregular journeys, those new to London and visitors	3	X			X		
Take the scenic route – route specific info highlighting great places you can visit, things to see, experiences to enjoy e.g. tourist areas, shopping district, foodie neighbourhood	3	X				X	
Bus route finder by postcode on TfL's website (reinstate this function)	2	X				X	
Cheapest way to Heathrow (promote X26)	2	X			X		
Re-look and info in other languages provided by us, third party apps and how easy it is to find on the website	I		X	X			X
Encourage greater sign up to marketing emails and test a more commercial approach	2		X	X	X		
More service improvement emails	3	X		Χ	X		

### <sup>48</sup> Information

#### Improvements to bus exterior take a long time – quicker wins elsewhere

ldeas to support theme	Reputationa lly positive	Revenu	e Impact	Opps for other modes	Time to	set up & be in market		
	(1-3)	Direct	In-direct	other modes	I-2 mon	3 mon	6+ mon	
Future of information on buses e.g. E link	2	Χ				Χ		
Provide common destination information where parallel routes all go to a particular location e.g. all buses from this stop go to Aldwych	3	X			X			
On bus product differentiation as retail point of sale to promote different products [short hops (speed benefit), trunk routes (15-25 min journey e.g. route 250 with air con and other comforts), town centre (local routes e.g. Harrow, Croydon), orbital]	3	X				X		
FacebookBOT Live arrivals for bus stop near you based on location or bus stop number. Find out information about whether your bus route is disrupted (status on route)	2		X			X		
Improve buses disruptions information on the website	3		X				X	
Leverage existing personalisation features to roll out disruptions information for bus routes	l		X				X	

## 49 Partnerships

ldeas to support theme	Reputationa	Revenu	e Impact	Opps for other modes	Time to	Time to set up & be in market		
	lly positive (1-3)	Direct	In-direct	other modes	I-2 mon	3 mon	6+ mon	
Visitor strategy — London & Partners relationship top priority and needs to deliver against rev gen objectives	3	X		X	X			
Re-open discussions re the 'London Card' a Mayoral manifesto commitment	2	X		X		X		
Financial services sector support via contactless — open up discussions with card providers	2		X	X		X		
Maximising opportunities from tech partners	2						X	
Establish more thematic parterships with key media owners e.g. ES = environment, Time Out = journey stim	2	X			X			
Re-establish London Loop e.g. 12 day things to do via a Bus	3	X			X			
Investigate new partnerships and leverage existing relationships where possible	2		X			Χ		
VCCP to introduce TfL to O2 to discuss 'O2 priority bus days' with free travel funded by O2	3	X			X			

## **Partnerships**

ldeas to support theme	Reputationa lly positive	Revenu	e Impact	Opps for other modes	Time to set up & be in market		
	(1-3)	Direct	In-direct	other modes	I-2 mon	3 mon	6+ mon
Revisit wifi, enhanced technology on buses for a better customer experience	3	X					Х
Partnerships with major retailers and with Nectar	3	X		X	X		
Partnerships offering exclusive content e.g. Amazon, Netflix to access free on Buses	3	X		X	X		
Commercial development discussions re roadblock opportunities e.g. Bus wraps and use of other TfL owned assets to take over all assets to increase revenue	l		X	X		X	
Partnerships with O2 arena e.g. Bieber Bus to the O2	3	X			X		

## Value and Ticketing – Being worked through

Ideas to support theme	Reputationa	Revenu	Opps for other modes		Time to	set up & be in	up & be in market		
	lly positive (1-3)	Direct	In-direct	other modes	I-2 mon	3 mon	6+ mon		
Ticketing promotions e.g. bus priority day, free travel or concession (like O2 priority days)									
Free travel trials with third party sponsorship									
A weeks free Oyster card for London businesses new employees to embed positive behaviour									
Pre-load Zip for students and sample at Fresher's fayres or via UCAS database — opportunities for students in September so we need to be aware of this									
Free Sundays (potential linkage with environmental alerts, third party sponsors)									
Oyster tap in devices at busy bus stations to speed up boarding									
Discounts off peak if can increase 80p yield to encourage trial									



#### 53 Funding for the Bus revenue generation activity

- £2.5m funding for the programme has been identified through savings made across CCT in 2016/17 and will be reported as an overspend for 2017/18.
- £0.5m of funding has been secured from existing 2017/18 marketing budgets, now transferred to CCT as part of London Buses marketing spend.
- NB. Roll out of E-ink, on bus digital screens, excluded from the above and bus infrastructure info changes highlighting popular destinations

#### Next steps and timings

#### Hot house areas

- Bus operations working with Bus companies to confirm fixed route livery requirements
- Integrated team developing communications materials
- Livery designs in development
- Pan public transport campaign
  - Research testing propositions and incentives 13 March
  - Communications development April-May
  - In market June
- Marketing support ideas generated by brainstorm
  - Working groups to develop detailed action plans and implementation timings





### <sup>56</sup> Love Your Bus

#### Improves reputation with indirect impact on revenue

ldeas to support theme	Ease o	of implemen	tation	Notes
	High Ease	Medium	Low Ease	
Social media/YouTube videos already in market	X			These have already been made so just need putting back on radar
Imbue buses with a personality (not another YOTB) — package of fun to raise profile e.g. local events (name a bus, bus dept staff engagement, drivers going into schools)	X			Bus routes, not buses
New product route level differentiation — scenic, heritage, shopping, foodie routes		X		Need to train drivers etc. Change annoucements
USPs of buses – Productive journeys for mums, students etc. with wifi access	X			Have USB ports. Must be careful with language as this can be seen as negative/patronising
Continue pushing to get every good news story out e.g. local route reliability stories, bus improvements, new green buses	X			Already in place. Could be highlighted on social media
Target lapsed, existing, car users. Use CRM, Countdown signs, PR stakeholders	X			
Clearer narrative for buses in relation to overall improvements plans and the balance between road works, bus reliability, prioritising space for buses vs cycling		X		
Raise internal profile of buses	X			Needs to be included as one of the top modes of transport

#### 57 Environment

Ideas to support theme	Ease of implementation		tation	Notes
	High Ease	Medium	Low Ease	
Bring together public transport, walking, cycling and healthy streets	X			Good sentiment here for PR point of view
One less car journey a week pledge	X			
Bus as the enabler. E.g. weekend leisure/shopping trip and user partnership opportunities to link journey to promotion incentives linked to destination e.g. take buses to Westfield and receive coffee/money off voucher	X (buy data)			By pulling out people that are going to Westfield at the weekend we can target them and inform them that their journey would have been cheaper on the bus (v petrol & parking). To do this we need to buy data. Opp to do bus wraps – this bus goes to Westfield – retailers can pay to advertise internally and target customers
Ambassadors helping with shopping bags	X			Around busy times of year e.g. Christmas
Leverage 'carrot and stick' using air quality alerts and emissions surcharging/ULEZ to encourage use of PT		X		Work with the NHS. Encourage travel to appts on public transport. Push notifications. Cheaper than carpark. Give hospitals Legible London tile for leaflets (can add bus route numbers). Other channels too other than NHS. News/weather forecast (and apps_ to give air quality alerts and encourage bus use not driving
Green ticketing – pay a small premium and TfL reinvests 100% into our environmental agenda			X	Hopper is strategic option to push as a Mayoral priority – in discussion
Electric bus — charge your device during your journey		X		Quick wins – get business case for this to be part of the spec for all new buses going forward. May be for retrofitting depends on budget rep. impact
Differentiated produce for visitors to increase yield and cross modal linkage e.g. cycle hire	X	Pa	ge 171	

### <sup>58</sup> Information

ldeas to support theme	Ease o	of implemen	tation	Notes
	High Ease	Medium	Low Ease	
Journey Planner to use live bus arrival info			X	Update TfL Journey Planner. Use partnerships with big apps to ensure consistent info across London.
Demystify buses making it clearer where they go, how to use them, how much they cost. Key for irregular journeys, those new to London and visitors		X		Pictograms of where buses go. Choose 4-5 routes and do this quickly. Added to route line map at individual bus stops
Take the scenic route – route specific info highlighting great places you can visit, things to see, experiences to enjoy e.g. tourist areas, shopping district, foodie neighbourhood	X			Similar to above. Research to identify tourist/foodie/shopping etc. routes. Make available on website & through L&P partnership (and others). Pick routes out of central London due to roadworks. Barrier of research time – Tom Cunnington's team to research
Bus route finder by postcode on TfL's website (reinstate this function)	X			Removed to simplify other aspects of website. If not postcode, must be another solution. Online to look into
Cheapest way to Heathrow (promote X26)	X			Also slowest and longest way. Don't want to drive people off the Tube. Promoting cheapest not quickest. Very localised campaign. Customer Information
Re-look and info in other languages provided by us, third party apps and how easy it is to find on the website			X	Current auto translate doesn't work well with website architecture. Review 15 languages already provided and apps available for visitors. Online to do market intelligence.
Encourage greater sign up to marketing emails and test a more commercial approach	X			Need opt in button — must be careful. Change opt in to opt out?
More service improvement emails	X			Ensure we aren't missing any service info emails

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### <sup>59</sup> Information

#### Improvements to bus exterior take a long time – quicker wins elsewhere

ldeas to support theme	Ease o	Ease of implementation		Notes
	High Ease	Medium	Low Ease	
Future of information on buses e.g. E link		X		Explored in hot house areas. Funding got withdrawn. Needs to be though about with language issue — not just visitors but also Londoners. Don't reflect the languages of the customers that we have in London. Missing a huge opportunity and not being diverse. May have to be proactive and go out to these people rather than getting them to come to us. Can we do things around social media or community groups MEC may have an idea on this?
Provide common destination information where parallel routes all go to a particular location e.g. all buses from this stop go to Aldwych	X			Brand links e.g. from Waterloo to Aldwych. Design team can look into this as this is an opportunity to push. In a hot house area may be able to do
On bus product differentiation as retail point of sale to promote different products [short hops (speed benefit), trunk routes (15-25 min journey e.g. route 250 with air con and other comforts), town centre (local routes e.g. Harrow, Croydon), orbital]	X			Can trial on a few routes. This will take a long time as need to go away and look at what it is and what can be done
FacebookBOT Live arrivals for bus stop near you based on location or bus stop number. Find out information about whether your bus route is disrupted (status on route)		X		Will improve access to live bus arrivals and disruptions in a free-to-use channel

### <sup>60</sup> Information

#### Improvements to bus exterior take a long time – quicker wins elsewhere

ldeas to support theme	Ease of implementation			Notes
	High Ease	Medium	Low Ease	
Improve buses disruptions information on the website			X	Bus disruption data does not currently allow short term diversions to show on the website and for third party apps. This will require up-stream systems changes.
Leverage existing personalisation features to roll out disruptions information for bus routes		X		Show disruptions indicator with personalised bus routes on homepage and elsewhere

## Partnerships

Ideas to support theme	Ease of implementation		tation	Notes	
	High Ease	Medium	Low Ease		
Visitor strategy — London & Partners relationship top priority and needs to deliver against rev gen objectives		X		Already a key partner and use all of their channels. Biggest win we could have for customers is improving the website for them. We lose customers quickly because they can't use the website. Nikki to provide what issues are	
Re-open discussions re the 'London Card' a Mayoral manifesto commitment		X		Sarah Gasson to check with comm dev. Was tried and failed in the past so see if we can pick back i[	
Financial services sector support via contactless — open up discussions with card providers		X		F&T rep to be at meetings. Mastercard don't want to be associated with buses because of sociodemographics of people that use buses. Green peldge – some big brands might want to be associated with this so we are able to pick this up. Target local town centers	
Maximising opportunities from tech partners		X		Rikesh to come to meetings going forward	
If budget is available, explore more thematic partnerships with key media owners e.g. ES = environment, Time Out = journey stim		X		Start pushing 'via bus' in Events Bulletin. Post this on website so can Tweet links to it	
Re-establish London Loop e.g. 12 day things to do via a Bus		X			
Investigate new partnerships and leverage existing relationships where possible		X			
VCCP to introduce TfL to O2 discuss 'O2 priority bus days' free travel funded by O2		X Pa	ge 175		

## **Partnerships**

ldeas to support theme	Ease of implementation		tation	Notes	
	High Ease	Medium	Low Ease		
Revisit wifi, enhanced technology on buses for a better customer experience		X		Any retailers with loyalty cards — need a group of people to sit in a room and come up with the list of ideas. Could only work for registered people. When registered we can also email them. When you have completed x amount of journeys you get x clubcard/nectar etc points	
Partnerships with major retailers and with Nectar		X			
Partnerships offering exclusive content e.g. Amazon, Netflix to access free on Buses			X	Note: in order to establish a partnership with any of these companies, they would need something very compelling in return. This would be difficult to achieve.  Could do something to encourage the inside to be bought so that we get the inside back for marketing. Should invite com dev to meetings	
Commercial development discussions re roadblock opportunities e.g. Bus wraps and use of other TfL owned assets to take over all assets to increase revenue		X			
Partnerships with O2 arena e.g. Bieber Bus to the O2		X			

#### Agenda item 5

**Customer Group Forward Agenda and Open Actions** 

#### Customer Pillar Group - Look forward Update / Decision / Theme Item Description Lead Discussion / To note 21 April 2017 (Submission date 10 April 2017) Fares & Ticketing programme overview Kathryn Jones Update Visitor Experience Strategy Julie Dixon / Mark Evers Update Update from 17 Feb meeting - Lucy to investigate technical and funding Fares, payments and issues to support bus service refunds. This is subject to implementing fast | Lucy Preston refunds Update Bus revenue generation universal load on buses. Update from 17 Feb meeting - Mike to look at pricing and ticketing which Mike Tuckett Bus revenue generation Update could be used to promote the service. 19 May 2017 (Submission date 8 May 2017) Communications: Safety / Silke Elvery/Ben Gammon Digital displays in stations (tube status update board) Feedback on the trials at stations Discussion Keeping you informed / Reliability / Follow up from 17 Feb meeting - Bridget Middleton to provide Phil with Environment / feedback from staff who experienced the LUCC pilot. Phil to collate with Social media strategy Phil Young Discussion Sustainability details of costs, and bring a paper to CG 16 June 2017 (Submission date 5 June 2017) Update from 27 Jan meeting - Siwan to bring a paper to CG on fare evasion Fare evasion policy & procedures (safeguarding children and vulnerable adults) Help, contact and policy and procedures. Lauren to support Siwan with the further analysis of Siwan Hayward/Lauren Sager-Weinstein Update plus analysis of the data that comes out of the safeguarding project complaints / data that comes out of the safeguarding project Customer service performance 14 July 2017 (Submission date 3 July 2017) Reinvesting in transport 11 August 2017 (Submission date 31 July 2017) Probably not going ahead - summer holidays 8 September 2017 (Submission date 28 August 2017)

6 October 2017 (Submissi	ion date 25 September 2017)		
3 November 2017 (Submi	ssion date 23 October 2017)		
I December 2017 (Submis	ssion date 20 November 2017)		
29 December 2017 (Subm	ission date 18 December 2017)		
Probably not going ahead			
- Christmas holidays			

#### **CUSTOMER GROUP**

#### Open actions

	Meeting date	Item	Action	Owner	Due	Status
2	27 Jan 2017	Safeguarding children and vulnerable adults	The group to inform their managers of the new safety course on ezone and ask them and their teams to complete the course.	All	Immediately	Open
3	27 Jan 2017	Safeguarding children and vulnerable adults	Bring a paper to customer group on fare evasion policy and procedures	Siwan Hayward	16 June 2017	Scheduled for CG meeting 16/6
4	27 Jan 2017	Safeguarding children and vulnerable adults	Lauren to support Siwan with the further analysis of the data that comes out of the safeguarding project and bring back their findings at a future meeting.	Siwan Hayward Lauren Sager- Weinstein	16 June 2017	Scheduled for CG meeting 16/6
5	17 Feb 2017	Bus revenue generation	Lucy Preston to investigate technical and funding issues to support bus service refunds. This is subject to implementing fast universal load on buses.	Lucy Preston	21 April 2017	Update at CG meeting 21/4
6	17 Feb 2017	Bus revenue generation	Mike Tuckett to look at pricing and ticketing which could be used to promote the service.	Mike Tuckett	21 April 2017	Update at CG meeting 21/4
7	17 Feb 2017	Refunds policy	Paper and draft Business Case to go to the Executive Committee showing our capabilities, amount of refunds, and reduced costs/less calls to the Contact Centre etc	Lucy Preston	Summer 2017	Open
8	17 Feb 2017	Refunds policy	A paper to go to Customer Service and Operational Performance Panel (CSOPP).	Lucy Preston	Autumn 2017	Open
10	17 Feb 2017	Social media strategy update	Bridget to provide Phil Young with feedback from staff who experienced the LUCC pilot. Phil then to collate with details of costs, and bring a paper to Customer Group.	Phil Young	19 May 2017	Scheduled for CG meeting 19/5
11	17 Feb 2017	2017/18 customer information budget	Alison to provide Vernon with breakdown of opex as well as capex costs for marketing and customer information.	Alison Naylor	March 2017	Open

#### **CUSTOMER GROUP CLOSED ACTIONS**



#### **Actions closed since the last Customer Group meeting**

Action	Update
Future Ticketing Programme, 5 June 2015	We've stepped back from this and don't currently plan to move season ticket sales online
Andrew Anderson to ensure a detailed discussion takes place, prior to moving to	only. If that policy changes, it will come back up as appropriate (and worth noting that City
online season ticket sales only	Hall seem quite content to promote PAYG over season tickets).
Staff 'report-it' app 4 Nov 2016	Update 15/2/17 from Mark - Based on latest/current experience in LU, I'm not actually
Mark Evers to liaise with Stuart Lee about submitting a report to the	convinced that a staff report-it app is the best way forward – for customer service
Customer Service and Operational Performance panel	suggestions at least. We are getting much richer feedback and better staff engagement
	through our Making Every Journey Matter group on Yammer. I'm keen to explore how this
	fits with Vicky Hall's culture change work — I've mentioned it to her, and will follow up.
Implementing the Ideal Buses Customer Experience 27 Jan 2017	Now superseded by work done on bus patronage recovery.
Alison Henderson and Lauren Sager-Weinstein to analyse customer	
complaint data to better understand bus driver behaviour.	
Social media strategy update 17 Feb 2017	Completed
Bridget to discuss with Anne Gavaghan (Mark Evers' team) whether our social	
media is reaching the right people at a borough level.	

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