TRANSPORT FOR THE South East

TRANSPORT EAST

ENGLAND'S ECONOMIC HEARTLAND

Supported by

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Bus Back Better Support Programme

Support Package 10
Marketing

April 2023

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Transport for the South
East, Transport East and
England's Economic
Heartland

Bus Back Better Support Programme

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Issue and Revision Record

Revision	Date	Originator	Checker	Approver	Description
A	12 April 2023	Patrick Noonan Nicholas de Vinne Chris Karypidis	John Collins Nick Richardson	Mark Fitch	First draft
B	24 April 2023	Patrick Noonan Nicholas de Vinne	John Collins Nick Richardson	Mark Fitch	Second draft
C	28 April 2023	Patrick Noonan	John Collins Nick Richardson	Mark Fitch	First issue

Information class: Standard

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1 Introduction

This technical note is one of a series produced as part of the joint project commissioned by three Sub-National Transport Bodies (STBs), England's Economic Heartland (EEH), Transport East (TE) and Transport for the South East (TfSE), to help support Local Transport Authorities deliver the government's National Bus Strategy for England ('Bus Back Better'). To deliver this strategy, the government has invited Local Transport Authorities (LTAs) and bus operators to formally collaborate and work with stakeholders and bus users to identify, and then implement, initiatives that will improve bus services and attract new users. It is envisaged that these improvements will be delivered through Bus Service Improvement Plans (BSIPs), Enhanced Partnership (EP) schemes, and franchising.

1.1 Background

The Department for Transport (DfT) has identified some additional funding to support its key priorities. There are four areas where Sub-National Transport Bodies (STBs) could undertake further work:

● **Decarbonisation:** Helping the DfT and Local Authorities (LAs) to implement the commitments made in the Transport Decarbonisation Plan;
● **Buses:** Helping LTAs to deliver on the commitments in Bus Back Better and develop an effective intra-regional bus network;
● **Electric Vehicle (EV) Infrastructure Strategy:** Assisting LAs in the rollout of EV infrastructure, potentially through regional strategies; and
● **Local Authority Capability:** Playing a role in building capability within resource- constrained LAs, to help them in the planning and delivery of local transport.

Three STBs, EEH, TE and TfSE, have joined forces to deliver a package of work to assist local transport authorities (LTAs) within the three regions with the delivery of their BSIPs and implementation of their EPs. The LTAs are:

● **England's Economic Heartland:** Bedford, Buckinghamshire, Cambridgeshire, Central *Bedfordshire**, *Hertfordshire**, *Luton**, Milton Keynes, North Northamptonshire, *Oxfordshire**, Peterborough, Swindon, West Northamptonshire.
● **Transport East:** *Norfolk**, Suffolk, Essex, Southend-on-Sea, Thurrock.
● **Transport for the South East:** Bracknell Forest, *Brighton & Hove**, *East Sussex**, Hampshire, Isle of Wight, *Kent**, Medway, *Portsmouth**, *Reading**, Slough, Southampton, Surrey, Windsor & Maidenhead, Wokingham, *West Berkshire**, *West Sussex**.

(* indicates an LTA that has received BSIP funding)

The project supports all the LTAs whether they have received DfT funding for their BSIP or not.

The project is split into two stages. The initial stage of the project – **triage and prioritisation** – ran from August to December 2022. It took stock of LTAs' current progress in delivering their BSIPs and scoped the work programme for future delivery activities. Online workshops were held in September 2022 and provided a forum for LTAs and bus operators to discuss their aspirations and explore themes, priorities, challenges and potential solutions. The project is ensuring that opportunities for technical pieces of work that would benefit multiple authorities are identified and progressed.

The second stage of the project – **implementation** – involves the delivery of support packages for the following topics that were identified during Stage 1:

- Support Package 1: Fares and Ticketing
- Support Package 2: Data Analysis, Monitoring and Evaluation
- Support Package 3: Low Cost and Quick Win Solutions
- Support Package 4: Building a Strong Case
- Support Package 5: Infrastructure and Road Space
- Support Package 6: Demand Responsive Transport
- Support Package 7: Rural Hubs and Integration
- Support Package 8: Funding Mechanisms
- Support Package 9: Collaborative Working
- Support Package 10: Marketing
- Support Package 11: Alternative Fuels and Low Emission Vehicles

Support will be delivered using a mix of channels, including webinars, toolkits and guidance, case studies and one to one support. It will also include establishing bus forums in each of the three STB areas to promote efficiency, avoid duplication of effort, share knowledge and best practice, and identify where joint working would be productive. The technical work will be undertaken to collate evidence and research. The emphasis will be on a regional approach so that common themes can be identified but localised assistance will be available to improve capacity in LTAs and provide specialist inputs regarding local issues.

1.1.1　Intended outputs and outcomes

Project Outputs: improved delivery of BSIPs and EPs, and support to LTAs who have not received government funding in the current round. This will include:

- Enhanced evidence base through research papers on prioritised knowledge gaps;
- Knowledge sharing within and between STBs and their constituent members and between the public and private sectors; and
- Better resourced LTAs through prioritised third-party support, provided in targeted areas.

Project Outcomes: these outputs will seek to produce results aligned to the National Bus Strategy's objectives including:

- Increased patronage;
- Enhanced accessibility and social inclusion;
- Reduced carbon emissions and improved public health; and
- More commercially sustainable bus networks.

TfSE is managing the project on behalf of the three STBs. A consultant consortium of Mott MacDonald and Arup is delivering the project. A Steering Group has been established, comprising the DfT, the three STBs, representatives from some of the LTAs, and Mott MacDonald and Arup.

1.2　Overview

Bus Back Better requires that each LTA's Bus Service Improvement Plan (BSIP) places a focus on improving bus patronage by making bus services easier to understand, through strong promotion and marketing to familiarise communities with their local buses to demystify the service for non-users and create introductory offers to promote services to them. This should also emphasise features that support personal safety and cleaning regimes in the light of the Covid-19 pandemic. This Support Package will focus on providing guidance around establishing effective marketing campaigns for bus services through a variety of media.

1.3   Introduction to marketing for buses

The catchment for buses can be huge, but too often, bus services achieve very limited uptake. The presence of bus services alone is an inadequate means of selling them to potential users. Residents and businesses along the route should be aware of the service, even if they are unlikely to use it. Simply seeing a bus does not mean that anyone will use it, particularly if it is unclear what the offer is. To overcome this, buses need to be effectively marketed in areas where alternative transport such as private vehicles have a dominant mode share.

Marketing of any product is built around the "seven Ps"[1]:

Table 1.1: The marketing mix and 7 Ps of marketing.

Product	What is being sold. For buses, this is a combination of factors such as the route and destinations served, service frequency, service speed and on-board comfort.
Price	The price point of the product and how this influences perceptions and expectations of the product. In areas of England outside of London, this will vary greatly depending on factors such as the length of the route, how well patronised it is, and whether there is any supplementary funding from government or developers.
Place	Where the product is made available, who it is promoted to and how it is promoted. As with any product, for buses, a market segmentation will need to be undertaken to identify who is most likely to use buses in any given location or context, and this might then influence route alignment and bus stop placement, or perhaps specialisation of service types such as an express service to an airport.
Promotion	Publicising your product through a variety of different strategies. This includes developing a marketing strategy to identify the target market and most effective means of communication, public relations, and advertising.
People	The staff that your customers will interact with and how this influences their experience and impression of your brand. For buses, this will include bus drivers, customer service attendants and office staff addressing complaints or queries.
Packaging[2]	The branding of a product helps to differentiate it and make it recognisable to potential customers. The function of packaging here is also to demonstrate to customers the quality of the product of service, presumably through having a brand that is of a quality commensurate to the product. For buses, this includes having coherent and strong branding elements such as a bus fleet design and livery choice, and wayfinding and signage design that are all unified.
Process	Consideration of how the service is delivered to bus users to make their journey as seamless as possible. For bus users, this incorporates the processes involved in finding and purchasing the right ticket, finding and catching the right service, and ease of follow-up for any issues that they may have, such as lost property.

The development of a suitable bus **product,** the **place** that it operates and the **process** for customers of using a bus is covered in many of the other support packages that have been

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[1] Mailchimp (2023). Marketing Mix & The 7 P's Of Marketing. Accessed via https://mailchimp.com/marketing-glossary/marketing-mix-7ps/.

[2] Sometimes also referred to as "Physical evidence".

delivered as part of the Bus Back Better Support Programme and so will not be covered in detail this note. The identification of a service **price** is dependent on the product produced, and also highly contextual factors, including business running costs and grants of government funding available. As such, and for the purposes of this note, **product, place, price** and some elements of **process** are assumed as being addressed in specific detail through other support packages or much broader business strategies for bus operators and LTAs.

While this note will contain some commentary on these and where they fit into the overall marketing process, it will focus on **promotion, people**, **packaging**, and some elements of **process,** and will encompass the following elements:

- Promotion: marketing strategy:
    - Identifying potential users, i.e., market segmentation;
    - Identifying the aspects of bus journeys that would appeal to potential users (e.g., price, journey time, convenience, etc.) when considering other travel options available;
    - Considering how lapsed or first-time users could be attracted to catch the bus;
- Packaging: designing branding:
    - Selecting and designing branding to fulfil the requirements of identified user groups;
    - Clearly presenting service information in a way that provides a straightforward and holistic experience for passengers via various media; and
    - Ensuring that the service lives up to user expectations and its branding is personalised to individual requirements.
- Process: achieving brand visibility:
    - Visually integrating all aspects of a bus service under the same brand identity (buses, stops, websites, apps, timetables, advertisements, etc.);
    - Partnering with local businesses and organisations where possible to raise awareness of bus services; and
    - Ensuring the bus service branding is not limited to locations internal to the service, i.e., marketing must be widespread to target non-users.
- People: continuing efforts:
    - Marketing cannot be a limited-time effort for a bus service. New users as well as long-time consistent users can always choose a different mode, and always need to be targeted;
    - Creating a plan for ensuring and rewarding loyalty to the service, leading to bus users becoming a more captive audience; and
    - Communicating ongoing improvements to the bus service, such as bus stop infrastructure, journey time or frequency improvements, and vehicle upgrades.

Throughout the note, each section will be marked with a version of the below icon to highlight which of the seven Ps that section will discuss.

This note addresses these elements and is set out as follows:

- **Section 2** describes a market segmentation analysis and how to identify potential users.
- **Section 3** provides an overview of how different aspects of bus journeys could be leveraged to attract users.
- **Section 4** explores how new and existing users could be attracted to bus services.
- **Section 5** looks at effective bus service branding that promotes and identifies bus services and provides some case studies.
- **Section 6** provides examples of how service information can be effectively presented so that it demystifies bus services for existing and new users.
- **Section 7** recommends how operators can better interact with customers to maintain their patronage.

1.4   Understanding the role of marketing in travel demand management

When considering marketing strategies for buses, it is important to keep in mind that the ultimate purpose is to encourage mode shift from other forms of private and less sustainable modes of transport. This is therefore closely related to the role of messaging and behaviour change in a travel demand management (TDM) plan. An effective TDM plan consists of three key components: capacity creation, network management, and travel behaviour change. Marketing is tied closely with travel behaviour change in terms of the specific above the line and below the line messaging that occurs in both, to encourage people to change their behaviour. These terms are explained below:

> **Travel demand management terms**
>
> **Capacity creation** refers to physical infrastructure or service investments that result in additional bus service capacity. This could be additional buses and services, new routes, dedicated bus lanes, expanding the hours of operation of bus lanes, or creation of new bus roads (such as guideways).
>
> **Network management** refers to operational changes to the road network that discourage private vehicle use and benefits buses and bus users. Examples of this include bus gates, traffic signal management, temporary traffic orders to remove impediments to bus services, low traffic neighbourhoods, or changes to ticketing and timetables.
>
> **Above the line advertising** or promotion is messaging that is broadcast on large-scale media with a more general audience targeted, aiming to increase overall brand awareness. It is typically quite expensive to deliver but is effective at building a general awareness of a certain product, such as a new bus service. It is typically done via traditional media formats such as television, radio, newspapers, magazines and billboards.
>
> **Below the line advertising** or promotion is messaging that is targeted at specific potential audiences. Messages can be tailored to the specific audience and delivered only to them. These can still be delivered through traditional media formats when it's likely that there will be a specific demographic that is engaged, but can also be delivered using targeted, in-person engagement (such as at workplaces or universities) or targeted internet ads.

The marketing advice contained in this note should therefore be considered and acted upon with cognisance of what improvements to existing services are being made to attract passengers. While some publicity and messaging can be distributed in the absence of capacity creation and network management to encourage behaviour change, the greatest benefit will be using this marketing advice to advertise the benefits of minor or major improvements across bus networks *in a targeted manner* as they are introduced.

The Department for Transport released a TDM toolkit in 2021 to help local authorities manage the reduced capacity of their transport networks in the wake of the Covid-19 pandemic. The toolkit can be found online at the link below:

[Department for Transport Travel Demand Management Toolkit – Managing Network Demand](#)

2 Identifying potential users

Attracting users to bus services requires LTAs and operators to understand who is using buses (and who could use buses in the future) and what their motivators are for using buses. This may take the form of market segmentation, where user groups are identified and then targeted with messaging that specifically addresses their needs.

The key benefit of market segmentation is that marketing activities generate the best returns by refining the service that is on offer and focusing messaging to those who are most likely to respond positively to it. Similarly, it means that messaging can be refined to target the needs and wants of certain groups, to emphasise certain benefits of using the bus to get around. Understanding the requirements of different current and potential user groups of bus services allows operators to better tailor the overall service offer to meet needs of users that are currently unmet. This overall process forms part of a marketing strategy, and involves identifying who you want to be targeting, where they are located and want the bus services to run, and what service you want to be targeting them with.

2.1 Market segmentation analysis

Market segmentation analysis is a marketing technique that allows customers (or bus users in the case of bus operators) to be split into different and distinct 'user groups'. It is a core part of a marketing strategy. The main goal of undertaking a market segmentation analysis is to better understand the needs and travel patterns of current and potential passengers. Creating a full picture of different user groups allows for targeted marketing campaigns to address the specific needs of certain groups.

This also supports the ongoing monitoring of the identified market segments and allows for trends in users' preferences and experiences to be identified and tracked. Improvements or expansions of the service offer could then be made to meet the needs of the target market. Figure 2.1 shows a typical example of segmentation of public transport users.

Figure 2.1: General segmentation of the public transport market[3]

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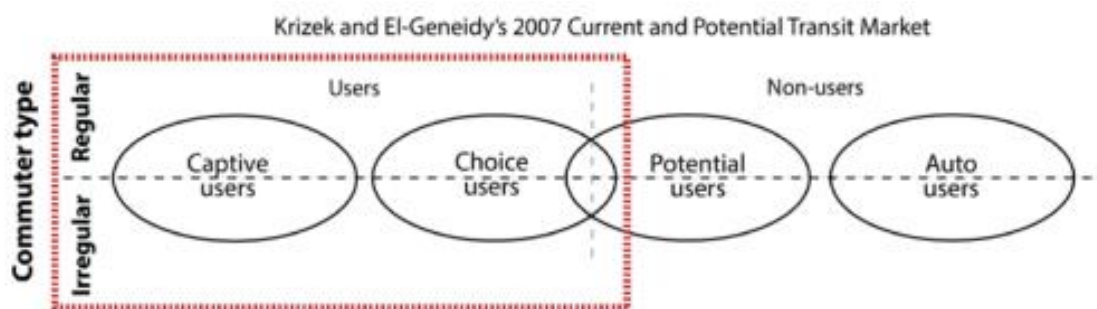
[3] D.V. Lierop and A. El-Geneidy. *A New Market segmentation approach: evidence from two Canadian cities. Journal of public transport*. 20(1). 2017.https://digitalcommons.usf.edu/cgi/viewcontent.cgi?article=1570&context=jpt

2.1.1   Data collection

Collection of data is required to produce a full segmentation analysis. Surveys therefore need to be conducted among both current users and non-users of buses and public transport. This survey should include a range of factors that could influence one's decision to use or not to use public transport, alongside sociodemographic variables to better segment the market.

Prevalence and trends of these characteristics should be surveyed and analysed for both bus users and non-users. Statistical analysis can then draw out discrete groups of users and non-users who typically share common traits. Potential questions or lines of questioning could include:[4]

● General socio-demographics: this includes age, education, employment status, income and ethnicity;
● Self-rated 'susceptibility to interpersonal influence': how much or little one's actions are influenced by their peers;
● Self-rated 'optimum stimulation level': how comfortable one is in different levels of stimuli;
● Willingness to take risks (in general);
● Social responsibility: awareness and interest in climate change and other concerns;
● Perception of private vehicles: emotional and social view of car usage;
● Time stress: how influenced one is by duration of travel;
● 'Benefits sought and perceptions of benefits delivered': what does an individual want from their transportation and what do they feel they gain from using the bus;
● Attitudes towards and perception of public transport;
● Personal preferences for transport: how would one like to travel in an ideal situation;
● Access to public transport service: proximity of home and workplace to the public transport network;
● Trip characteristics: how long would one's typical journeys take by different modes;
● Relative cost of catching the bus versus other modes of transport;
● Costs of operating a private vehicle, including fuel prices and parking costs;
● Private vehicle availability;
● Employer influence and support: are active or passive initiatives favouring any specific mode, e.g., "is there free parking at work?"; and
● Job characteristics: part-time, shift work, or early and late patterns.

The inputs listed above build upon one another to influence an individual's mode choice for each trip. However, marketing and branding inputs can also modify an individual's trip choice, as shown in Figure 2.2. The purpose of market segmentation is therefore to identify the relevant target audiences and identify what marketing techniques will capture potential new users or convince existing users to travel more frequently.

Information gathered through market research should also be used to refine the bus service's brand and customer experience, which is explored further in Chapters 5, 6 and 7.

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[4] Transport Research Board. *Using Planning & Research to segment markets*. 2023.
    https://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_36-b.pdf

Figure 2.2: Inputs to modal choice and behaviour for potential transport users, including the relevance of marketing[5]
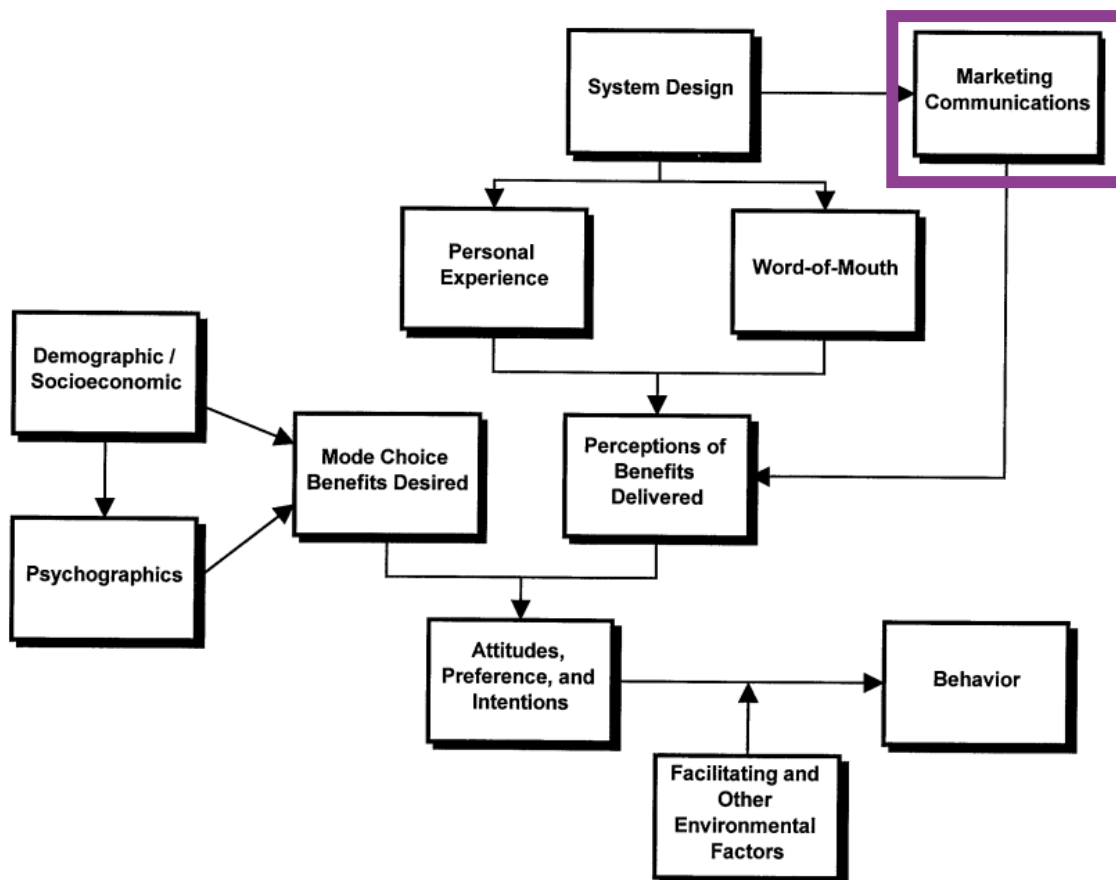
2.1.2   Cluster analysis

The data collected should then be analysed using a cluster analysis methodology. Cluster analysis groups current and potential users into distinct groups based on their preferences and behaviours. This identifies shared patterns in responses to certain statements or expressions of attitude and splits the sample of responses into 'clusters' of similar users. This allows for more discrete groupings to be identified than using demographics alone.

The concept of cluster analyses is best understood when plotted visually on a Cartesian (x, y) plane. This requires quantifying or categorising the responses to survey questions (if not already quantified), and then plotting responses for two chosen survey questions on each of the axes to identify where trends start to form. While cluster analyses are best undertaken using mathematical software to process large volumes of data, it may be possible to conduct analyses with smaller datasets. A visualisation of a simple cluster analysis is shown in Figure 2.3.

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[5] Transport Research Board. *Using Planning & Research to segment markets*. 2023.
    https://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_36-b.pdf

Figure 2.3: Example of a cluster analysis with 5 clusters.[6]
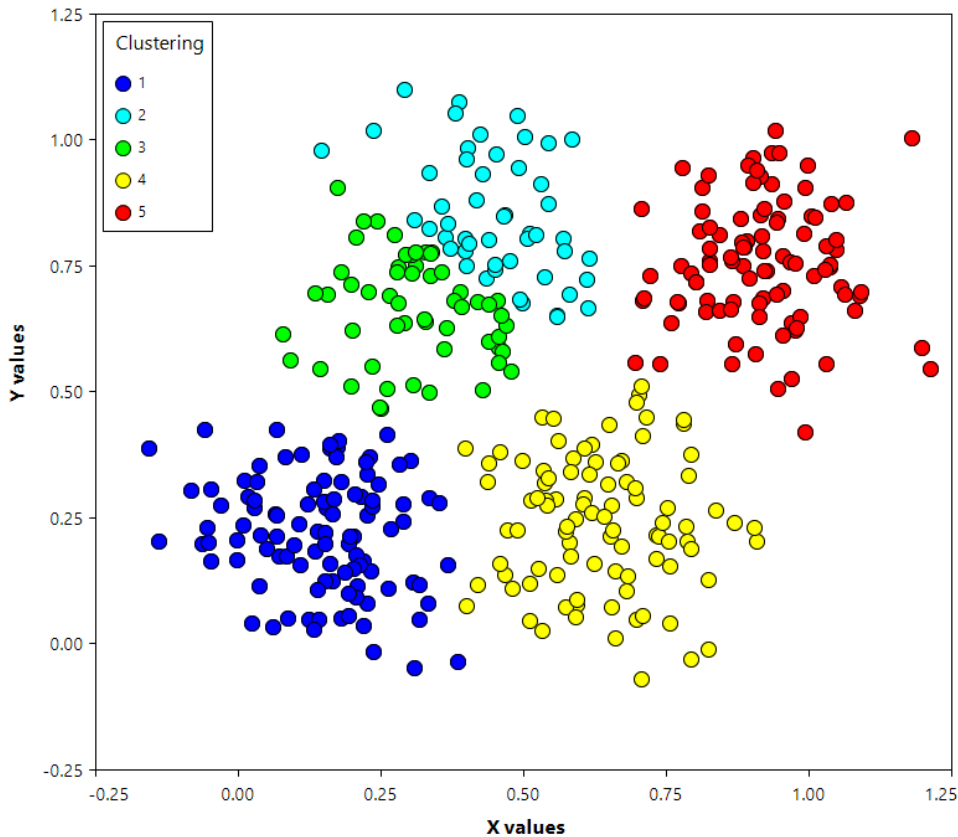
While there are many methodologies for cluster analysis, the four most common methods are summarised in Table 2.1. The type of cluster analysis that organisations should undertake will depend on their technical capability to undertake the work (or the availability of resources to outsource this work to a suitably skilled service provider). Distribution-based clustering is the most common type of clustering analysis used as it balances the level of complexity in undertaking the analysis with required the ability to analyse multiple parameters that come out of market and user surveys.

Table 2.1: Common types of cluster analysis[7]

Type of analysis	Description
Hierarchical clustering or connectivity-based clustering analysis	Hierarchical models can follow two approaches. In the first approach, they start by classifying all data points into separate clusters and then aggregating them as the distance decreases. In the second approach, all data points are classified as a single cluster and then partitioned as the distance increases. Also, the choice of distance function is subjective. These models are very easy to interpret but lack scalability for handling big datasets. Examples of these models are the hierarchical clustering algorithms and their variants.

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[6] IChrome. *Cluster analysis-two examples*. 2016. http://ichrome.com/blogs/archives/221

[7] Analytics Vidhya, *Clustering | Introduction, Different Methods, and Applications*. 2023. https://www.analyticsvidhya.com/blog/2016/11/an-introduction-to-clustering-and-different-methods-of-clustering/

Type of analysis	Description
Centroid-based clustering	This is an iterative method, in which data points are randomly grouped together into a pre-determined number of clusters. Accurate clusters are gradually derived by measuring the closeness of any data point to the cluster centroid that it is associated with, with the data point then reallocated to the closest cluster centroid before the next iteration. This is repeated until no data points are reclassified after an iteration. The k-Means clustering algorithm is a popular algorithm that falls into this category.
Distribution-based clustering	This methodology groups data into clusters of the same distribution set. It is the most widely used statistical analysis method but also uses more complex statistical analysis that can only reasonably be completed with relevant statistical software and knowledge. A key benefit of this method is that it allows for a comparison of several different variables (or survey questions) at one time.
Density-based clustering	This methodology searches the data space for areas of the varied density of data points in the data space. Different dense regions are isolated and the data points within these regions are assigned to the same cluster. Popular examples of density models are DBSCAN and OPTICS. These models are particularly useful for identifying clusters of arbitrary shape and detecting outliers, as they can detect and separate points that are located in sparse regions of the data space, as well as points that belong to dense regions. As with distribution-based clustering, this is a more complex method requiring specialist skill.

2.2 Typical user groups

Once a cluster analysis is undertaken, the groupings will be dependent on local factors. In transport planning, there are typical groupings of users that frequently reoccur in many situations. These groupings mainly reflect the motivators for people using or not using public transport, and can include such groupings as:

● **Enthusiastic users:** people who like to use public transport;

● **Keen but unsure:** people who are reluctant about using public transport due to lack of confidence;

● **Keen but cannot:** people who would like to but cannot due to lifestyle restrictions or a lack of service;

● **Mode agnostic:** people who are happy to take the easiest mode of transport;

● **No choice**: people who would prefer to drive but cannot;

● **Utilitarian:** people who are focused on travelling from A to B in the fastest way possible;

● **Comfortable travellers:** people who are less focused on speed and more focused on comfort and relaxation; and

● **No-way, no-how:** people who will never use public transport.

Based on local conditions and the number of questions in the market survey, user groups may combine some of the above categories, or be defined differently. To help map the motivators of

these groups, it may be useful to plot them on a quadrant chart that compares frequency of travel with willingness to travel so that target groups can be easily visualised.

An example of how these different groups could map out on a quadrant chart is shown below.

Figure 2.4: Mapping user groups against their motivators
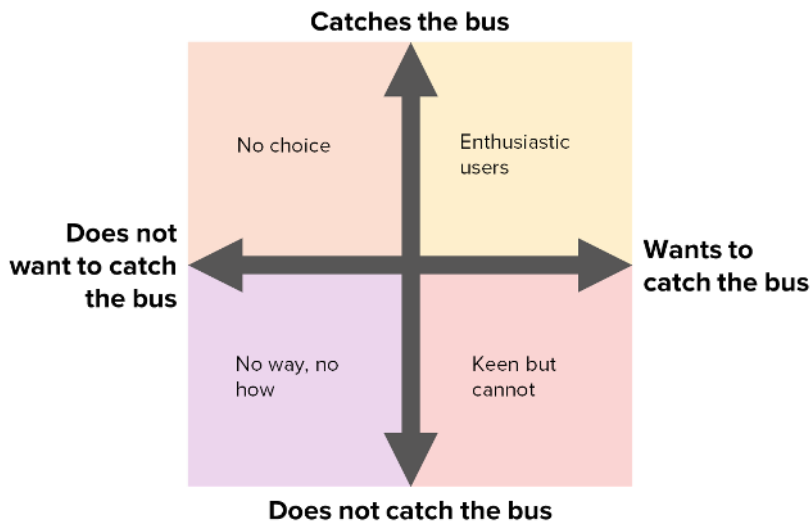
Without a complete market segmentation and cluster analysis, typical user groups can still be identified that generally fit into the four categories identified in Figure 2.1. This identifies users/non-users, regular/irregular users, and captive/strict car users. These typical user groups could include the examples shown in Table 2.2.

Table 2.2: Examples of potential typical bus user groups and reasons to travel by bus

User group	Typical demographic	Main motivator for bus travel	Key barriers to bus travel
Young people	Under 20 years old	Generally little or no access to personal independent transport	● Price can be particularly difficult for younger teenagers with limited or no personal income ● Services may end too early to be compatible with nights out ● Parents may not trust the safety and reliability of bus services
University students	18-26 years old, well educated	Conscious of environmental impacts of travel, limited access to private vehicles	● May value flexibility of cycling above bus travel ● Often very financially conscious
Lower-income and shift workers	All ages, generally working at abnormal or inconsistent hours	Financial means may limit one's ability to own and maintain a private vehicle	● Bus price may be uncompetitive with driving, especially if free parking is available at work ● Timetables incompatible with shift patterns ● Limited services to some employment areas, such as industrial estates and business parks.

User group	Typical demographic	Main motivator for bus travel	Key barriers to bus travel
Middle-income young professionals	25-40 years old, full-time employment	Financially and environmentally conscious, can be influenced by peers	• Can be unreliable to get to and from work on time • Image issue, particularly in some areas • Time pressures in life – want to travel by fastest means possible
Families	Families with younger children, all ages and demographics	Unable to drive the entire family together, either due to stress or vehicle capacity	• Cost of bus travel can be prohibitive and higher than car parking and fuel for a larger family • Lack of discounted family tickets • Possible insufficient space for prams/buggies • May not want to travel on busier services
Households with one or no cars	Couples or families, often in suburban or urban areas	Limited personal mobility, especially in one-car households where the vehicle is used by one member to travel to work	• Infrequent or unreliable services • Perceived cost – may prefer to reduce transport spending • Destinations within comfortable walking distance
Rural residents	All demographics, living in more rural areas	More comfortable for longer and/or infrequent journeys into town	• Infrequent services • Lack of real-time information • Bus stops inaccessible • Nearest bus stop may be beyond walking distance • Longer services may have higher fares • Services start too late/finish too early
Older age groups	Over-65s	Typically strong user group for buses, unable to walk longer distances, and able to use concessionary passes	• Concessionary travel passes valid only after morning peak – may mean that hospital appointments are too early to reach by bus • Concerned with personal health safety post-pandemic • Routes to and from bus stops not accessible

Habitual car users – Metra Rail (Chicago, USA)[8]

A famous piece of transport marketing targeting non-users is from the Chicago commuter rail system in the United States. Private vehicle users stuck in rush hour traffic are specifically targeted when they are likely to be least satisfied with their current mode choice, with the advert for the railway aiming to convince them that it may be a better option for their journey.

Where priority measures exist such that bus journeys are faster than cars at peak hours (or in areas with busways), the same tactic can be used. For other barriers to bus usage, similar tactics could create equally effective marketing campaigns.

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[8] E. Jaffe. *The one chart that explains all your traffic woes*. 2015.
https://www.bloomberg.com/news/articles/2015-03-02/the-one-chart-that-explains-all-your-traffic-woes

Fearful bus non-users – First Bus (Glasgow)[9]

First Bus in Glasgow commissioned a survey of 1,000 non-users with the aim of understanding common barriers to entry. Of those surveyed, more than one in five stated they avoid using local buses due to a lack of confidence in using them, and more than one in four said they would be more likely to use a bus if a how-to guide were produced. Bus services can seem complicated to someone who has never used a bus, or who has not used them for many years. Things that seem simple like hailing the bus, requesting a stop, and paying the correct fare can be daunting if there is not enough information available to potential passengers.

To counteract this, First Bus has produced a series of short videos aiming to raise confidence in each aspect of the bus journey. These videos are light-hearted yet informative and help to demystify and raise confidence in the bus system.

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[9] P.Halford. *First bus uses video campaign to raise confidence in bus use*. 2023. https://www.route-one.net/news/first-bus-uses-video-campaign-to-raise-confidence-in-bus-use/

3 Identifying aspects of journeys that would appeal to different groups

With market segments and user groups identified, the next stage of marketing is to identify how the existing bus service offer can be promoted to highlight attractive elements of bus services to current and potential passengers. Additionally, aspects of the existing bus service offer can be refined or improved to meet an identified need for certain user groups, including the product and place where it is offered (service routes and frequency), the process of catching the bus (availability of service information and bus stop infrastructure), and the price (fare levels). Similarly, there is an opportunity to emphasise negative aspects of potential users' existing travel patterns to encourage behaviour change and modal shift to buses.

Travel habits often only change once there is a significant shift in circumstances. Examples of this include a change in workplace or home address, welfare concerns arising from the Covid-19 pandemic, fare policy changes such as the £2 fare cap, or a step-change in public transport connectivity when a new mass transit link opens. Of these, the key example is that daily travel habits are often formed and set soon after someone moves to an area based on their needs and the availability of options at that time and daily travel decisions then rarely become an active choice.[10]

Despite potentially having concerns about time lost due to congestion, environmental impacts, parking difficulty, or a lack of enjoyment of driving, car users will often stay car users unless there is a strong incentive to change. Some of the reasons for this are:

● There is a perceived lack of viable alternative options, particularly in suburban or rural areas;

● Car users are able to undertake multipurpose trips, or 'trip-chaining', such as shopping on the way home from work, or dropping off children to school; and

● There is little or no incentive or to find an alternative travel mode.

Some of these barriers can be addressed through structural or service changes. For example, multipurpose trips are usually more difficult by bus, especially where services are infrequent and fares are not integrated to easily allow for switching between services or modes. In London, this is addressed through the 'Hopper' fare that allows users to board unlimited buses within an hour, enabling trip chaining at the same price as a single journey.

However, some of these barriers can be addressed – at least in part – through marketing and messaging. For example, negative messaging about public transport use during the Covid-19 pandemic appears to have had a lasting effect, as many users appear to be reluctant to return to the bus now that they have established new travel behaviours (such as travelling to a workplace less often, or in some cases, not at all). This messaging has specifically affected older bus users, who are more susceptible to severe illness from Covid-19, and therefore continue to avoid public transport. This is a specific example of where marketing and targeted messaging is probably needed to reassure previous bus users that it is safe to travel by bus again given the measures taken such as contactless payments, ventilation and strong cleaning

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[10] Behaviour Change. *Modal shift from Car to Bus*. 2023. https://behaviourchange.org.uk/case-studies/the-behaviour-change-lab

regimes (or advise on precautions customers can take to minimise this risk when travelling by bus). This type of promotional initiative is most likely to be successful if delivered in collaboration with health authorities such as the Department for Health and Social Care.

The following sections will identify what marketing and targeted messaging should focus on to either maintain or encourage bus use for both existing users and non-users.

Housatonic Area Regional Transport (Connecticut, USA)[11]

Buses from HARTransport operate throughout the southwestern area of the US state of Connecticut, centred around the city of Danbury. The network consists of eight scheduled fixed-route links alongside dedicated shuttles to commuter rail stations and around town centres.

In central Danbury, all eight routes meet at the 'pulse point' which has been set up with a physical ticket booth and co-located bus stops for all services. Buses from all routes operate on either a half-hourly or hourly frequency, all arriving at and setting off from the Pulse Point at the same time. This ensures that all passengers are able to transfer between routes without delay and can access any point in the network with a single transfer.

Additionally, the neighbouring transport agency in southern Connecticut operates a similar hub system, with the connecting route from HARTransport arriving at that hub at the correct time to ensure further onward connections.

The Pulse Point features clearly on branding on the buses and website in Danbury, and the physical ticket office ensures a clear visible presence to non-users passing the hub area.

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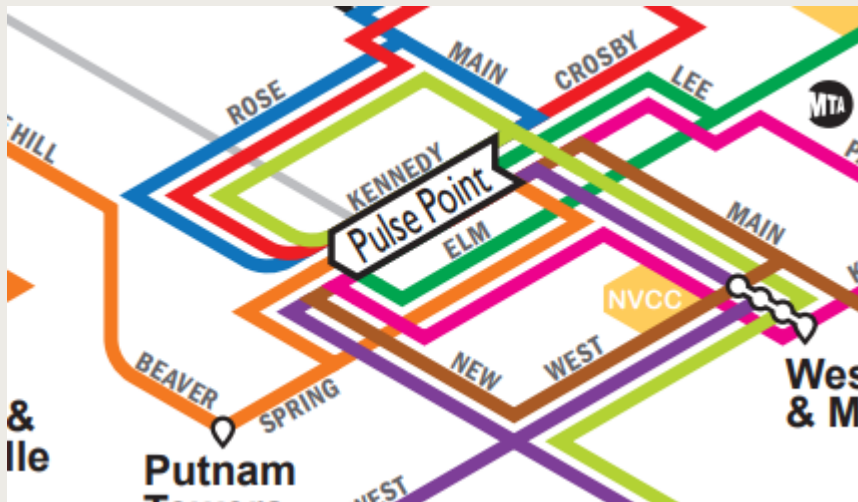
[11] HARTransit. *System Map: CityBus routes*. 2023.
https://www.hartransport.com/sites/default/files/SysMap%20CityBus%2072022C.pdf

3.1 Relevant journey aspects for existing users

Transport Focus has begun conducting monthly bus passenger satisfaction surveys (Bus User Survey), which help to draw out the most important factors affecting users' journeys. Figure 3.1 shows the outputs of this research in terms of the passengers' satisfaction and rated importance of various journey aspects.

Figure 3.1: Passenger-rated importance versus satisfaction levels for journey aspects of bus travel[12]
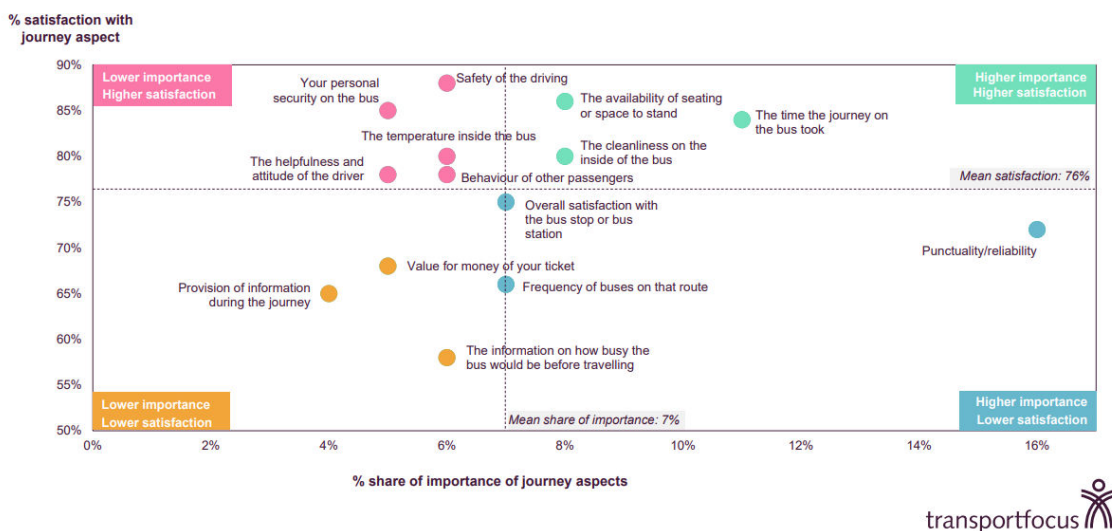
Bus passenger satisfaction: key driver analysis (February 2023). Data range: 8-10 July 2022 to 13-15 Jan 2023. Sample size = 4145

Journey aspects are split into quadrants according to high/low importance and satisfaction. Aspects within high importance and high satisfaction are the most relevant for promotion, as these will be aspects that buses tend to do well, which non-users may not be aware of. These areas to focus on in messaging are:

● The time taken for the bus journey;
● The availability of seating or space to stand; and
● The cleanliness on the inside of the bus.

Similarly, items of lower importance but higher satisfaction can also be highlighted in communications material to attract new users. These include:

● Safety of the driving;
● The temperature inside the bus;
● Behaviour of other passengers;
● Personal security on the bus; and
● The helpfulness and attitude of the driver.

The areas needing the greatest investment in terms of improvement and marketing are those ranked as having higher importance and lower satisfaction. Where LTAs or operators make substantial investments to improve the experience in these areas, they should be advertised to reinforce existing users or attract those who are open to bus travel but reluctant. These journey aspects are:

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[12] Transport Focus. *Bus passenger satisfaction: key driver analysis*. 2023. https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2023/02/13100731/Bus-passenger-satisfaction-key-driver-analysis.pdf

- Satisfaction with bus stops;
- Frequency; and
- Punctuality and reliability.

Aspects with low importance and low satisfaction, while potentially less important from a marketing perspective, should still be prioritised by bus operators and LTAs. These include:

- Value for money of your ticket;
- The information on how bus the bus would be before travelling; and
- Provision of information during the journey.

3.2 Relevant journey aspects for non-users

As with existing users, there is a range of barriers to bus use for people who do not currently use the bus regularly or at all. While this is useful to understand this group from a general business and marketing perspective, each individual bus market should undertake its own market research to understand what are the most important factors that act as barriers, as these will differ in significance depending on the location, the current bus service offering and other local conditions.

Transport Focus has conducted qualitative research on barriers to bus use in the West Midlands[13] to identify barriers to bus use in the area as well as factors that would possibly encourage non-users to switch to travelling by bus. This identified the following reasons:

- **Fear of having a bad experience**: This was the main experience identified during the survey. These derived from personal experience (for those who had used the bus) or others' personal experience and hearsay (for those who had not used the bus), either through family and friends or social media. This might be the case also for people that never had the chance to try the bus. Overall, the perceived risk of the chance of having a bad experience seemed sufficiently high among non-users to encourage them to choose other modes of travel. These fears included factors like personal safety, cleanliness and physical discomfort as well as antisocial behaviour and crime on board buses;
- **Slow journey times and speeds;**
- **Inaccurate or unreliable bus arrival and departure times, or unavailability real time journey information;**
- **Barriers for people with disabilities or mobility impairments**: This was cited as a recurrent issue, from reasons that vary from uncomfortable or unsafe waiting areas to competing with non-disabled passengers for space or a seat on the bus;
- **Availability of evening services**: There might be cases that bus services stop in the early evening. This will impact mode choice for people who are planning evening activities, including after work, which will in turn affect mode choice earlier in the day. Along with fears about safety both on and off the bus, low frequency of night time buses are significant barriers that do not encourage bus travel;
- **Perceived value for money:** Many non-users considered that the value for money for car use is higher when travelling in a group and the expense is shared or distributed over several people. Furthermore, non-users prefer car over bus due to its convenience for various reasons. It is faster and more reliable in terms of journey times, it has more space and can serve disabled people better. Also, it is comfortable, provides privacy and keeps people safe from unpleasant circumstances and antisocial behaviours. While it was not

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[13] Transport Focus. *Barriers to bus use in the West Midlands: qualitative research*. 2023. https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2021/08/16151429/Barriers-to-bus-use-in-the-West-Midlands_.pdf

contained in the research, it should be noted that many car users are not aware of bus fares or the relative cost of bus travel.

A similar study undertaken for the Aberdeen & Grampian Chamber of Commerce[14] found that factors which impacted whether or not someone chose to use a bus included:

- Needing to use their car for multi-purpose trips;
- Cost of catching the bus for short journeys is too high;
- Comfort of driving in a private vehicle;
- Routes were either indirect or too slow;
- Bus stop is too far from their house or destination; and
- Buses are perceived as unreliable.

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[14] AGCC, First Group and NESTRANS. *Reducing the barriers to bus use.* 2015. https://www.nestrans.org.uk/wp-content/uploads/2017/02/FINAL_Barriers_Report.pdf

4 Attracting and retaining users

Many potential bus users have limited or no experience of catching a bus. Their last experience may be the bus taking them to school or journeys undertaken decades ago. The experience of bus use has improved dramatically over recent decades with step-free access on all buses, real-time information, stop announcements, reduced emissions, and easy payments for most services. In some rural areas, park and ride is combined with bus hubs to provide a convenient way to travel into larger towns while avoiding parking costs and traffic.

If the market for bus use is to grow, then new users need to be attracted away from car use. This chapter will consider which infrastructure and service improvements can be highlighted through marketing to attract different groups of potential users, as described in Chapter 3.

Aspects that may appeal to habitual car users include:

- Bus journey time, punctuality and reliability;
- Service frequency and capacity;
- On-board comfort, such as cleanliness, security, temperature, and on-board features;
- Helpfulness, safety and attitude of the bus driver;

- Pre-journey satisfaction, such as bus stops and service information before and during the journey;
- Value for money of your ticket; and
- Convenience and novelty for infrequent trip types.

With many of the examples provided below, the focus is on reinforcing the message to existing bus passengers and customers that they have made the right decision to travel by bus and to reassure and appeal to potential passengers and customers that bus travel is a viable option for them.

4.1 Bus journey time, punctuality, and reliability

Journey time, punctuality, and reliability are major influences on modal choice for both existing and potential bus passengers. Improved and expanded bus priority schemes and increases in the amount of dedicated bus lanes have helped to minimise and stabilise bus journey times, reducing impacts from congestion, disruptions by accidents and road works. Similarly, real-time journey information can provide confidence to passengers and help address concerns about punctuality and reliability for passengers where there are infrequent services and a missed or cancelled bus can be significantly disruptive. Focusing on measures that address issues with reliability and punctuality through financial compensation is an additional area of advertising that could retain and attract bus passengers.

Table 4.1: Key messaging points for bus journey time, punctuality and reliability.

Feature	Selling point to retain existing users	Selling point to attract new users
Bus priority infrastructure such as bus gates or bus lanes	Reinforce their decision to travel by bus, particularly if time saving or journey reliability compared to their existing journey can be quantified	The reliability of the bus journey time compared to private vehicles would likely be the more compelling message, particularly if combined with messaging about access to town centres with bus gates and limited parking.
Access to real time journey information	Provide easy access to real time journey information to help them plan their current journey and other, new journeys by bus.	Real time journey information is available so that they can make an informed choice before they travel each day.
Coordination of services between buses and buses and other modes	Demonstrate how existing bus passengers could potentially use the bus to make other bus journeys conveniently.	Potential bus passengers who have avoided catching the bus because it is not convenient may discover that their journey is not as difficult to undertake as they previously thought.
Financial compensation for delayed or cancelled journeys	Existing users will be reassured of their mode choice if they know that they can get their fare back for journeys which were unsatisfactory. Similarly, it may provide some reassurance during periods of poor service, such as during industrial disputes or when there are driver shortages.	Curious but unsure or reluctant users may be more encouraged to trial travelling by bus if they are reassured with a money-back guarantee, or similar.

First Bristol, Bath and the West[15]

First launched a comprehensive delay repay scheme in the West of England under their 'Customer Promise'. Under this scheme, passengers whose journeys were delayed due to either a bus departing from a timing point over a minute early or departing more than 20 minutes late can claim a voucher for free travel on a future date.

However, the system is not widely advertised, nor easy to use. Passengers making claims must use the general contact form, which is difficult to navigate to on their website and not immediately obvious that it is the correct form. Additionally, the return time is upwards of two weeks, which reduces the effectiveness of the refund policy.

High Peak Buses[16]

Delay compensation is available for High Peak Bus passengers who are delayed arriving at their end destination by more than 60 minutes, regardless of cause. Along with offering repayment of fares for delayed journeys, the bus company will support the cost of alternative transport where a delayed or cancelled service means no other bus services on that day would be available.

However, this scheme is also not widely advertised nor easy to use. It requires passengers to submit two separate online forms, making it difficult to access compensation.

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[15] First Bus. *Customer Promise*. 2023. https://www.firstbus.co.uk/bristol-bath-and-west/help-and-support/customer-promise

[16] High Peak. *Delay compensation*. 2023. https://www.highpeakbuses.com/delay-compensation/

4.2   Service frequency and capacity

Frequency of buses can be difficult to address via marketing as service frequencies are traditionally linked more to ridership, as well as operational and resourcing budgets. However, there are still measures that can increase passenger confidence, or target new users. While low-frequency routes do not have the flexibility and turn-up-and-go service that is more likely to attract car drivers and other non-users, clear marketing and timetabling can reduce the level of unattractiveness.

Optimising connection frequencies to maximise transfer opportunities with the smallest waiting time can increase the effectiveness of the network without any necessary changes to overall frequencies. Operating infrequent and regional bus networks on a 'pulse point' strategy is used around the world.[17] 'Pulse point' refers to routes that converge on transfer points at consistent times, allowing for reliable and quick interchanges for passengers continuing their journey between multiple routes.

In many cases, regional bus networks are already set up in this way, but not marketed as such. Clear branding on buses, stops, maps, and on operators' websites should set out where intended transfer points are. This can increase non-users' willingness to try the bus.

Table 4.2: Key messaging points for service frequency and capacity.

Feature	Selling point to retain existing users	Selling point to attract new users
Additional bus services on an existing route	Higher service frequency means that customers have more choice about when they travel.	Higher service frequency means that buses are more convenient for travel
New bus route	Use the new bus route to undertake additional journey types.	New bus route could make bus travel more convenient and attractive for people who currently don't have access to buses.
Coordinated interchange points for low service frequency routes	Use interchange points to make longer, multipurpose or additional journey types by bus	Use interchange points to expand accessibility for those who might not think they have direct bus access
Availability of seats	Use bus data to identify which services are the least busy during the morning and evening extended peak and suggest customers re-time their journey to take advantage of spare seats.	There are more seats available on services for a more spacious, comfortable trip.

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[17] J. Walker. Basics: *Finding your pulse*. 2010. https://humantransit.org/2010/11/basics-finding-your-pulse.html

> **Compass Travel**[18]
>
> Compass Travel operates buses across West and East Sussex and into Surrey. Many of its routes are infrequent, connecting rural areas to regional centres. While the network is not currently set up to operate on a timed transfer basis, there are many points where bus services along intersecting axes could be optimised to enable improved and secure onward connections for passengers.
>
> In some of these instances, there are already interlinked services or timed transfers, but this is not the norm. For example, routes 125 (Lewes-Eastbourne) and 126 (Seaford-Berwick) intersect each other directly but only one of the services per day on route 126 has a well-timed connection to route 125.
>
> Not all intersecting services can realistically have consistently well-timed connections due to the extent and rural nature of the network but areas for better connections should be identified and advertised as such. This would make the most of the limited service frequency on many rural routes.

4.3   Comfort and convenience

On-board comfort and convenience are ancillary elements of bus travel that can be highlighted by bus operators and LTAs to encourage bus travel among potential passengers. As an example, in rural or regional areas, time spent on the bus while commuting or travelling can vary from short journeys, around 10 minutes, to much longer ones of an hour or more. Even though this may compare poorly with a car journey on the same route, passengers could take advantage of this time to undertake other activities, and many bus companies have provided on-board facilities to enable this. This could be through charging devices or using on-board wi-fi.

Table 4.3: Key messaging points for comfort and convenience.

Feature	Selling point to retain existing users	Selling point to attract new users
Buses are regularly cleaned	Reinforce to passengers that buses are often cleaned and sanitised to provide a welcoming environment and protect against illnesses. Messaging could include contact points to report buses that are unclean.	Explicitly state how often that buses are cleaned to demonstrate that they are a safe, comfortable environment.
Heating and cooling	Buses are comfortable for travel at all times of year – even in a heat wave or a cold snap.	
Freedom to multitask or complete other activities	Encourage existing passengers to use their bus trip to complete activities that they might otherwise do at another time. For example, get started on their work day or plan their weekend.	Emphasise that multi-tasking cannot be undertaken while driving a car and that
Availability of Wi-Fi and charging points on board buses	Passengers can establish habits on the bus as part of their daily routine, such as knowing that there will be a charging point available for personal devices. The bus is reliable in more ways than just transporting passengers from one point to another.	Despite potentially being a slightly longer journey, time spent on the bus can save you time by allowing you to work or do other activities during your commute.
Park and ride for access to larger towns or cities with restricted vehicle access	Advertise new or expanded park and ride facilities that may be more convenient for certain customers.	Still have the convenience of driving from your home, but don't worry about trying to find expensive parking in busy town centres.

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[18] Compass Travel. *Bus Timetables.* 2023. https://www.compass-travel.co.uk/compass-timetables/bus-timetables/

4.4   Pre-journey experience

Passengers' experience of bus stops and stations could be improved through initiatives raising their awareness of and engagement with bus stop improvements. Even if only a limited number of users take advantage of the offer, introducing a system to provide feedback on bus stop quality could increase satisfaction. Taking advantage of the bus user community to identify bus stops requiring urgent attention not only makes the users feel more attached to their services, but also draws on personal knowledge to help LTAs and operators prioritize the most important areas for investment.

Currently there are no easily accessible and user-friendly systems from any bus operator or transport authority in the UK to allow users to give feedback on bus stop quality and provision. Providing simple and accessible platforms for user engagement fosters a greater sense of community within bus users and helps users and operators alike. Building from a platform for engagement, programmes such as bus stop adoption could be offered. This would provide internal marketing at bus stops, branding them as sites of importance to the community. Volunteers, drawn from both users and non-users could ensure the continued upkeep and greening of local bus stops. Their contribution could be clearly marked on each applicable bus stop in a similar way to railway station adoptions by community groups.

Table 4.4: Key messaging points for pre-journey experience.

Feature	Selling point to retain existing users	Selling point to attract new users
Online form	Users feel they are heard and valuable especially after improvements have been made.	Not applicable for non-users
Phone/Live chat	More personalised which increases customer loyalty. Users feel they are heard and valuable.	Not applicable for non-users
Social Media	Users feel they are heard and valuable especially after improvements have been made. Quick and easy way. Feedback is in public view. Reading positive reviews would help retain existing users.	Potential users might be motivated to use the bus by reading positive reviews from existing users.
Bus stop adoption	Bus stops are clean and well maintained. Volunteers' names on the bus stop. Their service is recognised by the community.	Bus stops are clean and well maintained. A number of free rides for the first few months would increase the number of users.

4.5   Price

In general, the patronage of buses is highly related to bus fares and income of users.[19] Fare levels and ticketing options need to be optimised to balance an increase in revenue per journey with ensuring services are financially accessible for target user groups. Fundamentally, an increase in the price (fares) will result in a decrease in the demand. Setting the appropriate fare levels for bus services is a complex exercise, and this is covered in much greater detail in Support Package 1: Fares and Ticketing. Sections of particular interest with respect to marketing and attracting new users include sections 3 (Setting fare levels and fare structures), 7 (Key advice) and 8 (Case studies).

Different user groups will respond differently to fare levels, and LTAs/operators need to understand each group's needs. For example, younger age groups like school and college students are unlikely to own a private vehicle. They are highly dependent on their family when it comes to income and so a slight change in the bus fare will probably not affect bus demand.

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[19] N. Paulley., R. Balcombe., R. Mackett and H. Titheridge. The demand for public transport: The effects of fares, quality of service, income, and car ownership. *Transport Policy*. 13.4. 2006. http://dx.doi.org/10.1016/j.tranpol.2005.12.004

Bus is after all, the cheapest means of public transport and people under 20 will continue to use it due to their limited income.

The same stands for employed people with limited disposable income. As this target group cannot afford to own a car, or car use on a daily basis is costly, a relative change in the price of fuel will not affect the demand and people will continue to use it.

The main marketing focus should be on households with limited or no car availability. People in this target group do not usually have access to a private vehicle any time within the day as this may be occupied by another member of the household. A direct comparison of the cost of using a car against using a bus could increase the number of users for buses, as people that usually use don't have access to the private vehicle within the household will be forced to use a public means of transport and people occupying the private vehicle within the same household will understand the difference in the cost.

Older people are another target group that operators should seek to attract or win back. People of this group are usually pensioners with low incomes who are unable to drive, meaning they are more reliant on public transport. Highlighting the low cost of the bus trips, in combination with other factors like cleanliness and safety, could contribute to the increase to the number of bus users. Bus travel also provides an opportunity for social interaction for older people who might experience loneliness and isolation, as well as maintaining independence once they are no longer able to drive or walk longer distances.

Table 4.5: Key messaging points for price

Feature	Selling point to retain existing users	Selling point to attract new users
Capped ticket prices	Informing existing customers of the new or extended benefit.	Focus on predictability of capped cost of travel during a cost of living crisis.
Not needing to pay for parking at their destination	Reinforcing to customers that they have made the right decision to travel by bus as it is saving them money.	Removing an unnecessary expense while the cost of goods and services is rapidly increasing.
Saving money on the cost of fuel	Reinforcing to customers that they have made the right decision to travel by bus as it is saving them money.	Removing the fluctuating and unpredictable cost of petrol while war in Ukraine is ongoing.

4.6 Convenience and novelty for infrequent trip types

4.6.1 Collaboration with businesses

Jointly promoting businesses and tourist attractions that are accessible by public transport can be mutually beneficial to both businesses or attractions and operators. Operators are able to gain service visibility and reach new user markets from visitors and customers who would not otherwise consider travelling by public transport and the businesses are able to effectively reach new potential customers.

Bus operators may be able to launch new services that would not be commercially viable without a large semi-captive market of visitors to associated businesses. What is unique about this marketing scenario is that there is unlikely to be existing or regular users, potentially aside from employees travelling to or from a major attraction like an amusement park or theme park. Because of this, promotion needs to focus on new users and be as far forward and visible in an individual's trip planning process. As these are captive markets focused on tourism, it is often possible to charge premium fares for these services without impacting patronage.

Theme parks and amusement parks are often thought of for this purpose, drawing large crowds for a local area and usually accessed mainly by bus for their public transport offering. Legoland Windsor (served by Green Line buses) and the Warner Bros Studio Tour in Watford (served by

a standalone bus shuttle) are key examples. However, the commercial partner need not be as large scale with a captive audience as you would find with an amusement park or theme park.

Smaller business collaborations are still essential to targeting wider audiences and to improve the public's perception of bus travel. City-based tourism often focuses on combining public transport tickets with tickets to galleries, museums and other tourist attractions, focused on allowing people to use public transport to get around for a day out.

Table 4.6: Key messaging points for business collaboration

Feature	Selling point to attract new users
Bundled transport and entry ticket price	One ticket to take care of all the planning for a day out.
Dedicated shuttle service between transport interchange and tourist destination or attraction	Focus on benefits of public transport travel: • Affordable • Leave the car at home • Avoid traffic and parking fees Include journey planning information in the promotion or at point of sale of for tickets (i.e., when purchasing online)
Using public transport to travel around to see different attractions or businesses	Cross-promote between attractions and businesses that are easy to get to by the regular public transport network. Note easy connections between different attractions along public transport corridors or routes. Note nearest public transport stop or route to use to access different attractions.

Transport for London Posters[20]

The London Underground has a long history of promoting day trips by public transport, with eye-catching posters that reach new users and urge them both to consider a new/different location for a day out and also to increase their use of the tube and bus for leisure travel.

Previous collaborations have included museums, parks, National Trust sites, department stores, and other locations.

These posters are internationally recognised and celebrate the attractions and public transport in equal measure, mutually raising their public image.

THE TATE GALLERY
by Tube

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[20] London Transport Museum. *The collections*. 2023. https://www.ltmuseum.co.uk/collections/the-collection?f%5B0%5D=collection_type%3APosters

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Barnstaple nightclub partnership[21] [22]

Stagecoach in North Devon introduced new night services on its Route 21 in 2018 from Bideford to Ilfracombe through Barnstaple town centre. Working in partnership with a local nightclub (Fever & Boutique in Barnstaple) for branding and marketing, the new night bus on Fridays and Saturdays offered customers a safer and cheaper option for getting to and from the venue. Updates on the new route were posted on the club's social media accounts, ensuring that clubgoers would be aware of the service and could consider using it.

> **Fever Barnstaple**
> @FeverBarnstaple
>
> ITS BACK!! #nightbus
> Every Friday & Saturday Ride The Night Bus From 7pm–4am
>
> Now Extended To Ilfracombe!!
>
> #bideford #barnstaple #braunton #ilfracombe #n21 #nightbus #partythenightaway instagram.com/p/BzF4bQlALOZ/...
>
> 1:07 pm · 24 Jun 2019

4.6.2 Leisure route promotion

While bus users are often being seen as a captive market, it is important to consider methods of targeting alternative user groups. Post-pandemic, ridership in the leisure market is rebounding faster than the commuter market so continued efforts to attract new and repeat users of the bus for leisure trips are essential. While a habitual car user is likely not going to switch to the bus for commuting trips through marketing, individuals and families could more easily be swayed for discretionary travel.

The south of England has many popular leisure and tourist areas, which often have associated problems with parking and access. Increased awareness of bus routes serving tourist hotspots, and/or which offer scenic journeys, would open up new revenue streams. Some individual operators have taken steps to specifically publicise journeys appealing to leisure travel, but greater industry-wide cooperation and effort is needed in this space.

Table 4.7: Key messaging points for leisure route promotion

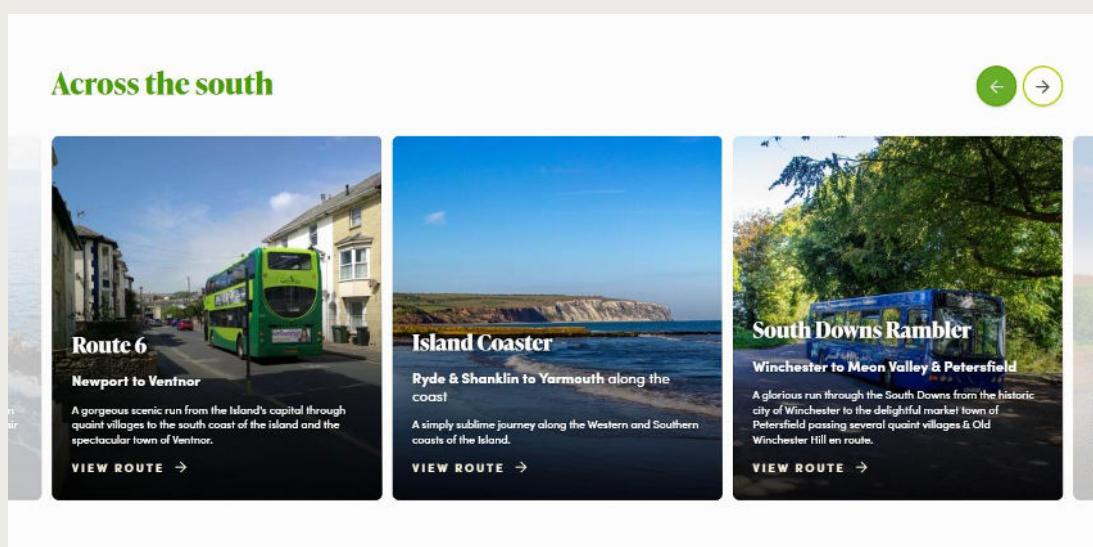| Feature	Selling point to retain existing users	Selling point to attract new users
Information provision at bus stops and stations	Ease of use, in public view and can be seen while waiting for the bus	Ease of use, in public view and can be seen by anyone passing by cost effectiveness information of using the bus
Hold events or tours	Loyalty rewards, exclusive access, socialisation	Discovery, socialisation, and information gathering, expert guidance
Discounted or bundled tickets	Affordability, flexibility, sustainability, convenience	Affordability, flexibility, sustainability, convenience, fun and adventure for those looking for new and exciting experiences

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[21] J. Cooper. Petition started to bring late night 'Christmas party bus' to seaside town. *Devon Live*. 2018. https://www.devonlive.com/news/devon-news/petition-started-bring-late-night-2252372

[22] Fever Barnstaple. *Night bus*. 2019. https://twitter.com/FeverBarnstaple/status/1143128531280564224

Feature	Selling point to retain existing users	Selling point to attract new users
Website and social media	Convenience, ease of use, offers, real-time updates, customised content, customer service	Convenience, ease of use, offers, community building, emphasis on service's commitment to sustainability

Scenic Buses and Great Scenic Journeys [23] [24]

Scenic Buses (scenicbuses.co.uk) is an ongoing project from Mangopear marketing agency promoting bus routes around the UK that offer spectacular scenery. The site is very intuitive, split by region and type of service (including a section on open-top bus routes). Up-to-date timetable information is provided alongside a summary of the key towns and destinations along each route (with some attractions on routes having promotional ticket reductions for bus users).

Across the south

Route 6
Newport to Ventnor
A gorgeous scenic run from the Island's capital through quaint villages to the south coast of the island and the spectacular town of Ventnor.
VIEW ROUTE →

Island Coaster
Ryde & Shanklin to Yarmouth along the coast
A simply sublime journey along the Western and Southern coasts of the Island.
VIEW ROUTE →

South Downs Rambler
Winchester to Meon Valley & Petersfield
A glorious run through the South Downs from the historic city of Winchester to the delightful market town of Petersfield passing several quaint villages & Old Winchester Hill en route.
VIEW ROUTE →

Great Scenic Journeys (greatscenicjourneys.co.uk) is a similar, soon-to-be-launched initiative, which should be even more effective as the site is to be funded by bus operators themselves. This will result in the operators having greater ownership over the information and publicity offered. Most major bus operators (Go-Ahead, Arriva, Stagecoach, First and Transdev) have already signed up, with at least 100 routes expected to be included when the site launches. Clear branding is planned to come alongside listing on the site, with the included bus routes featuring a Great Scenic Journeys logo on the buses or stop signage. Membership to the initiative will also allow operators to take advantage of support in creating marketing materials and surveying users and non-users of the services.
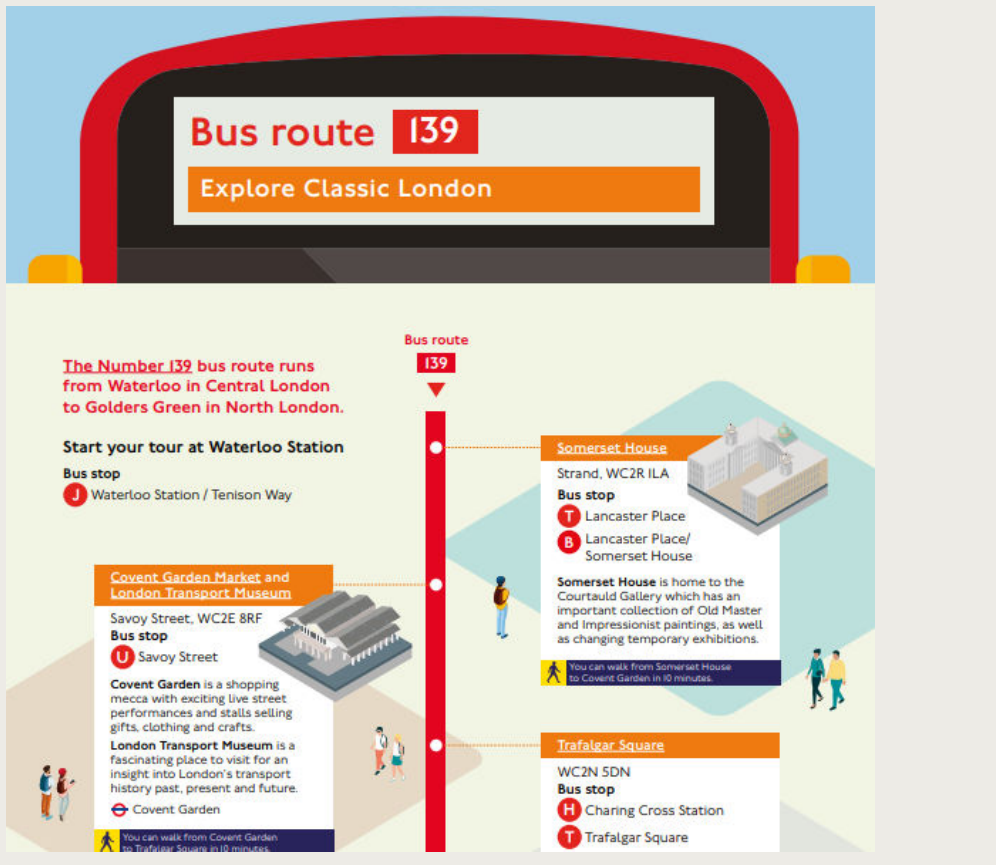

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[23] P. Halford. Making the most of the view from the bus window. *Route one*. 2023. https://www.route-one.net/features/making-the-most-of-the-view-from-the-bus-window/

[24] Scenic Buses. *Welcome to scenic buses*. 2023. https://scenicbuses.uk/

Transport for London bus leisure routes[25]

TfL bus services that offer particularly good routes for tourists and visitors have been selected and promoted individually on their website. Five bus routes through central London are currently included, labelled as routes for things such as 'Museums and Palaces' or 'Antiques and Curios'. Each route has a graphical route schematic giving clear information on the route of the bus, with stop locations and attractions to visit on the way.

Similar route-level branding and promotion could be replicated in other locations outside of London for services passing key attractions and tourism destinations.

[25] Transport for London. *Bus Leisure Routes*. 2023. https://tfl.gov.uk/travel-information/visiting-london/experience-london/bus-leisure-routes?intcmp=53128

5 Branding

Branding is an essential part of the "packaging" of a bus service as a product, and it is also closely related to promotion, product and the customer process, which all feed into the overall brand experience for customers. It is centred on visual and design elements to indicate to customers what their experience will be when using a product. For buses and public transport more generally, it can establish the image of the service in the mind of the broader population of a city or region by creating a recognisable, appealing, and trustworthy identity that residents and visitors are drawn to. If used correctly, a brand can help increase and maintain ridership.

At its strongest, public transport branding becomes synonymous with the overall experience of a place – such as Transport for London, Merseytravel or Nexus' Tyne and Wear network – and is recognised as a central component of a transport system. This branding is pervasive across the system and reflects or contributes to the identity and place of the region that it services and is reflected in the design of fleets, architecture, wayfinding and service information signage and ticketing. At its worst, however, poor service and performance becomes associated with a poor public transport brand can drag down patronage as its poor reputation compounds over time.
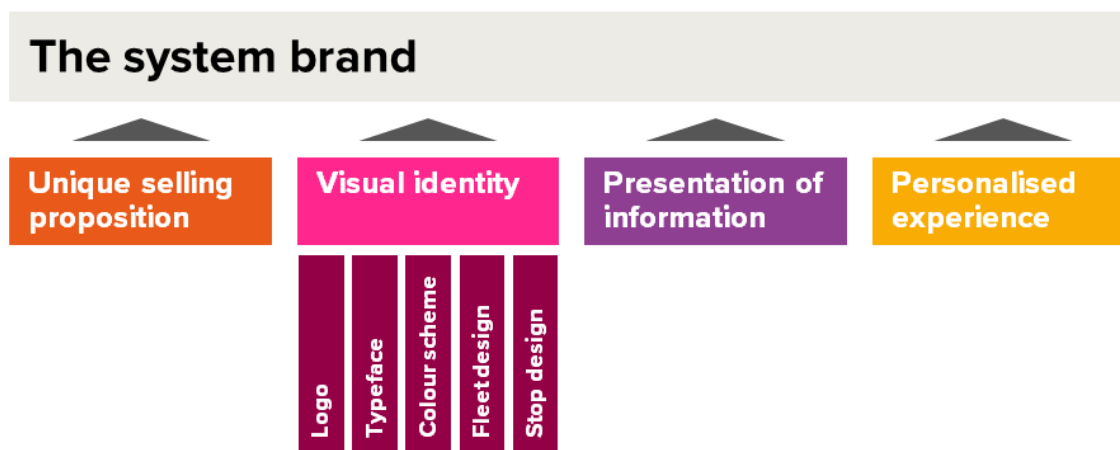
There should be visual elements of branding, including core elements such as a logo, a distinctive typeface and recognisable colour scheme to quickly allow customers to identify the service offering and remind them of the experience they will have. These elements should be integrated with the design of the bus fleet and bus stops to create a holistic visual identity.

This branding should also include a Unique Selling Proposition (USP)[26] for the service that makes it distinctive and appealing. Branding can also be an essential component of promoting the USP and maximising ridership and income to the operator. An example of this is express or trunk services having distinct branding to simplify service identification for users, or tourism services such as airport shuttles or express services having dedicated baggage storage areas and premium fares.

Where there is sufficient breadth of service offering, it may be reasonable to develop a house of brands or hierarchy of brands. This is where there is a distinct individual brand for a range of different service types offered by an operator or within a region of network. The different brandings should have common elements so that they are recognisably part of a unified transport network, but distinct in a way to easily indicate that different service types offer different USPs.

There are also other elements of branding that customers interact with, such as the presentation of information, which is considered in Chapter 6, and feedback systems to personalise the experience, which is explored in Chapter 7. Combined, these elements all create an effective **system brand** for the bus offering.

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[26] M. Enoch, and S.Potter. Marketing and the British Bus Industry. *Figshare*. 2019.
https://hdl.handle.net/2134/3344.

The system brand

Unique selling proposition	Visual identity	Presentation of information	Personalised experience
	Logo / Typeface / Colour scheme / Fleet design / Stop design		

These elements all work together to create a positive emotional response in customers to attract them to the service, though it requires increasing amounts of investment to achieve and maintain a brand at each of these levels.

Most of the LTAs England with the highest rates of bus trips per person in 2021/22 have individual bus network brands and liveries. Outside London (which has one of the most distinctive bus identities in the world), Brighton & Hove has the highest rate of trips per person, with 110 trips per person per year. Brighton & Hove Buses is explored as a case study later in this chapter.

5.1 Unique Selling Proposition

Focusing on a USP identified through the market research can contribute significantly to the brand of a bus service, and in turn, the success of the service. Determining a USP for a bus service should typically involve a consideration of what market research has identified as significant friction points for potential users within a specific market catchment, then determining what can feasibly be implemented as a service offering to address this. For greater success, USPs should respond to findings of market research rather than initiatives championed by an operator or other kind of sponsor with little or no basis for the offering.

It is likely the most successful services will have several USPs that work compatibly with each other to provide a superior service. Examples of USPs that can be emphasised in a bus product's brand include:

● The visual identity of the bus infrastructure:
  – Distinctive fleet design or bus livery. Route specific livery can also be used to emphasise key routes with better levels of service;
  – Consistent and distinctive stop architecture that makes the bus route more legible and easier to identify for people less familiar with the service offering;
  – Succinct service information (See Chapter 6);
● An all-electric or low-emissions bus fleet;
● Easy-to-remember service patterns or frequency, such as clockface departures or frequency based timetables;
● 24 hour service offering;
● Limited stop and express services;
● On-board wi-fi and personal device charging;
● Significant bus priority measures, such as bus lanes. This would also include route segregation as is found in a BRT system, such as a guided busway; and.

● Tourism features, such as luggage storage areas or open-air decks for leisure routes.

It is emphasised that promoting a USP that has not been identified as being of value, importance or significance through market research is unlikely to yield patronage growth.

5.2   Visual identity

Operator branding should be clear and consistent across all elements of a network. Route-level branding can also be used to promote individual services, but is only at its most effective when the individual route brands sit within a wider branding strategy. The visual identity is most effectively delivered through:

● Bus livery;
● Bus stop signage;
● Ticketing and integrated ticketing;
● Bus stop and interchange totems; and
● Branding on printed materials and communications, such as advertising posters and timetables.

Location-specific branding is extremely important in raising the image, and especially the network clarity, of a local bus service. Bus operators all have their own corporate livery and branding, although this often lacks any individuality or local attention for many areas of the UK.

A localised logo, font and colour scheme contributes significantly to the establishment of a bus service within its geographic location and builds trust and value amongst potential passengers through brand recognition alone. Key examples in England of strong transport brands and identities include the Tyne and Wear 'Nexus' transport network and Manchester's Metrolink.

	Transport for London	Nexus (Tyne and Wear)	Bee Network (Manchester)
Logo(s) *Where there is a house of brands, a selection is shown as an example.*	BUSES UNDERGROUND DIAL·A·RIDE OVERGROUND	M METRO B BUSES F FERRY	(bee hexagon logo)
Typeface	Johnston100 (Bespoke typeface) ABCDEFGHIJ KLMNOPQ RSTUVWXYZ 1234567890 !@£#	Calvert (Bespoke typeface) ABCDEFGHIJKLMNO PQRSTUVWXYZÀÅÉ abcdefghijklmnopq rstuvwxyzàåéîõøü& 1234567890($£.,!?) ₄₃	Pantograph (Bespoke typeface)
Colour scheme	Varies according to mode. For buses, red only with black highlights.	Varies according to mode. For buses, grey and red with black highlights.	Yellow with black highlights

	Transport for London	Nexus (Tyne and Wear)	Bee Network (Manchester)
Totem example			
Livery example			
Notes			*Manchester's unified branding scheme is currently being implemented and will be complete across buses, sharebikes and light rail by 2025.*

Increasing the use of localised branding can help demystify bus travel to some extent for non-users. For example, national operator branding may not mean anything locally, may come with limited brand recognition, or worse, it may trigger negative brand recognition. Regional operating zones should have region-specific branding, marketing, websites, etc. Some major bus operators in the UK, for example, do not offer regional websites, saving on management and administration costs, but reducing clarity and ease of access for information, and increasing the risk of negative reputation spreading across different areas.

Bus livery is a key area where the visual identity of a bus service must be delivered completely. Livery will always require a standard base colour on the bus fleet but can be augmented with vinyl bus wrapping for short term promotions. It is extremely easy to apply and equally easy to change or amend these. This technique would enable buses to get back on the roads quickly by reducing the downtime significantly. Five-year warranties can now be provided which makes wraps and printing technology suitable not only for long term corporate branding but also for promotional advertising[27].

Buses also offer a huge amount of internal space suitable for branding or advertising. Efficient labelling in the interior and powder coating applied on metal surfaces such as rails and grab handles is a low cost and very effective way to help users with directions and route identification, maintaining at the same time consistency and cohesiveness in the branding strategy.
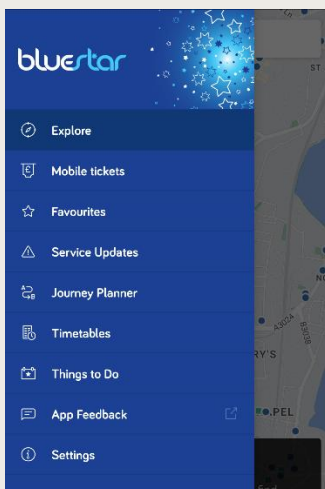
[27] Aura Brand Solutions. *Bus and coach branding: Aura's expert tips*. 2021.
https://www.aurabrands.com/infocus/2021/bus-and-coach-branding-auras-top-tips

Bluestar buses branding [28] [29] [30]

Bluestar in Southampton, part of Go South Coast. is now the only major operator within the city following the exit of First in February 2023. Bluestar maintains a clear and unique brand that extends to every aspect of its services. The buses themselves have a distinctive blue livery with the slogan '*shining across your city*'.

The same clear blue branding with stars is extended to timetables, the mobile app, website, bus stop flags, and a physical ticket office/travel shop in the city centre, which further extends the reach of the brand consistency and makes it more visible to non-users.

5.3 Case study: Brighton & Hove

Buses across Brighton and Hove are operated by several companies, but the largest operator is Brighton & Hove Buses, a subsidiary of Go-Ahead group. This operator runs most services with a consistent red and cream livery, with some route-specific branding for particular routes. Electric buses are gradually being rolled out in the city, and the benefits of these buses – including fuel efficiency, air quality, and carbon reduction – are being activity promoted to users and residents through a variety of methods. This is an example where buses can help strengthen a city's reputation as an environmentally-focused, progressive city.

Tactical use of branding for buses can be applied to particular routes so that users can easily understand and identify the service. A successful route branding should be consistent and recognisable across regions and can contribute to the growth of patronage as the network gains more and more passengers every year. Indicatively, TAS Partnership (2000) reported that Brighton and Hove Bus and Coach Company achieved growth of 8% a year on its five-core branded 'Metro' routes[31].

Brighton & Hove's famous residents[32]

Local branding can be much more detailed e.g., with naming individual buses after local people or, in the case of Brighton and Hove Buses, featuring names and images of famous local residents or users on specific buses. This represents efforts to make bus services relevant to the communities they serve by creating goodwill supported by good customer experiences.

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[31] M. Enoch, and S.Potter. Marketing and the British Bus Industry. *Figshare.* 2019.
https://hdl.handle.net/2134/3344.

[32] Graves, K. *The story behind the names you see on the front of Brighton buses.* SussexLive. 2021. Accessed at https://www.sussexlive.co.uk/news/history/story-behind-names-you-see-6031393

6 Presentation of service information

Clear and well-presented bus service information works as self-fulfilling marketing and promotion. The more visible and engaging the service information, the more it will entice infrequent users and non-users to consider travelling more often by bus. Well-presented service information is central to improving the process part of marketing a bus service, and also incorporates elements of packaging and branding to help bus users recognise and feel reassured that they are checking the right service information.

Bus service information can be complicated and confusing and the potential user needs to select information for the right day and time of day. Presenting this as an online rolling timetable may be helpful but often it assumes that the user knows where they are going – this is not necessarily the case and the ability to explore journey options is being sought. Full timetables are often hard to digest and have numerous variants. Simple messaging is key if consumers are to make a positive choice. Clear information about journey times, drop-off and pick-up locations and fares is needed rather than too much information with too many variances. Further information on service information can be found in Support Package 3: Low cost and quick wins, Section 5.

6.1 Consistent branding strategy across different media

Building from the overall branding strategies laid out in Section 5, an operator's brand and image should filter into service information provision. Whether online or in print at bus stops or on buses, the same imagery, typeface, colours and theme should be included to ensure clarity and consistency are maintained.

Typical examples of media that should have brand consistency include:

● Website design;
● Online timetables;
● Printed timetables at bus stops;
● Bus flag signage and operator naming;
● Web advertisements;
● Printed advertisements; and
● Bus livery.

Clarity and ease of access for unfamiliar users should be the central focus of any branding strategy. Users and non-users should be able to immediately identify a bus service as part of the operator's network through the design of buses and stop signage.

This can be especially important where multiple operators exist in the same area. Ideally, all operators within a single area are branded consistently to simplify passengers' impression of the network. Some Mayoral Combined Authority (MCA) areas are moving in this direction through franchising their bus operations, with both Manchester and Liverpool set to introduce a single unified brand identity for their urban operations in the coming years.

The regulatory framework for enforcing consistent branding across a regional bus network with numerous operators where franchising has not occurred is complex. Bus companies may not be co-operative in updating their branding to reflect a single bus network, and legally, there is few

or no mechanism for a local transport authority to enforce this. Enhanced Partnerships between LTAs and bus operators is a key avenue to encourage or establish a unified brand across different operators within a defined region and should be considered as part of any agreement set up during the EP process.

6.2   Timetable and route map presentation

Where bus operators have successfully implemented a clear branding strategy, whether by overall network or by individual routes, that branding should filter down to timetables and other service information. Timetables should be clearly identifiable as a route from a specific operator and brand. For routes that do have their own individual brands within brands, this is even more important.

Timetable information must also be accessible to both users and non-users. When well-designed and widely distributed across different media, timetables themselves can be a form of free marketing for bus services. Especially at bus stops, the availability of services will be better highlighted by an eye-catching legible timetable than by a bus stop flag with no service information. Too often, bus stops in England lack any clarity on not only where you can go from that bus stop but also which services stop there. A bus stop marker is insufficient to gain the confidence of infrequent or non-users and change their travel behaviours. Maps, timetables, and stop signage and information all need to be of high quality to reach customers most effectively. Highly visible service information contributes to the awareness that passengers and potential passengers have of bus services and may impact their decisions about mode choice before they even leave the house.

Bus timetables should follow some general principles that lead to easily accessible and memorable service information and branding:

- Consistency is key:
  - Network-level branding should be complementary to the presentation of service timetables;
  - Any branding used elsewhere for certain routes should be present in those routes' timetables: colours, fonts, service numbers/names; and
- Routes that are not entirely branded but are distinguished by colour in certain areas like network maps, should have matching timetable colour schemes. Balance between clarity and breadth of information:
  - Where services run to a consistent clock-face schedule, this should be highlighted;
  - Every single service and stop do not need to be present on a timetable; and
  - Service patterns and key stops should be immediately visible.
- Context and interchanges:
  - Each route timetable should feature both a linear route diagram with key stops and a semi-geographic map of the areas served;
  - Stop locations offering interchange to other bus routes (both within the same operator and on other operators) or to other transport services should be clearly marked; and
  - Overall network information should be provided, clearly and simply setting out fare information and where/how to buy tickets for services.

Equally, route maps need to demonstrate a similar balance between providing a high level of information and ensuring that it is accessible to unfamiliar users. General principles which should guide the implementation of clear and accessible route maps include:

- A mix of stylised overview level and detailed street level information should be provided for route maps, as in the Cambridge busway example above:
    - Maps should avoid attempting to display too much information;
    - A completely geographically accurate map is just as inefficient as a stylised line diagram for bus services;
    - Ideally, an interactive and zoomable map to show different levels of clarity should be provided;
    - PDF maps should still be made readily available, as they are still relevant even with the advent of digital on-demand journey planning; and
    - Network maps and individual route maps should be provided at all stops, with a focus on key destinations.
- Route maps should be distinctive in terms of colour and service:
    - Bus network maps should not have all routes defined by the same colour;
    - Even where route-level colour distinction has not been created across all media, distinct services should be immediately distinguishable on a map;
    - Where there are varying levels of service across a network (i.e., 24-hour frequent services as well as infrequent local services on the same map) there should be a clear indication of what type of service each route will be; and
    - Routes that differ at times of day or on weekends/weekdays should also be clearly defined to be accessible to new users.
- Route maps should be available in different media and widespread:
    - Online route maps are essential but other forms are needed to create a comprehensive network identity;
    - Overall network maps in key public areas can raise the awareness and attractiveness of bus services to infrequent and non-users;
    - Bus stops should at a minimum have route number identifiers to be clearly a part of the network and matched to route maps;
    - Where possible, bus stops should have both an overall network map and a local area map to show specific services from that stop as well as walking routes from the stop; and
    - Printed timetables should include a map of that route with all key stops as well as a stylised network map to contextualise the route.

6.2.1   Case study: Cambridgeshire busway online route map and timetables[33]

The online service information available on the Cambridgeshire busway website is intuitive and accessible to those unfamiliar with the system. A clear map of services radiating from Cambridge city centre to the north and south is available, with busway services along with key connecting routes and National Rail interchanges shown. Bus mapping is a notoriously challenging task for transport operators, with the balance between geographic accuracy and detail and clarity difficult to achieve. Here, the map takes advantage of the rapid transport style of service available on the busway to use a more stylised map of services. This does not sharply reduce the information available and makes it more accessible to unfamiliar viewers.

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[33] The Busway. *Routes and Times*. 2023. https://www.thebusway.info/routes-times.shtml

Figure 6.1: Example of the Cambridgeshire busway network map.

An additional benefit is that the overview route map is interactive, with users able to click on shaded areas to access more detailed maps of town centres along the route. The detailed map of St Ives town centre is shown below. Having such a feature, with a clickable stylised overview map and detailed geographically-accurate maps with road names in town centres produces an effective and engaging balance of clarity.

Figure 6.2: Detailed map of bus routes in St Ives.
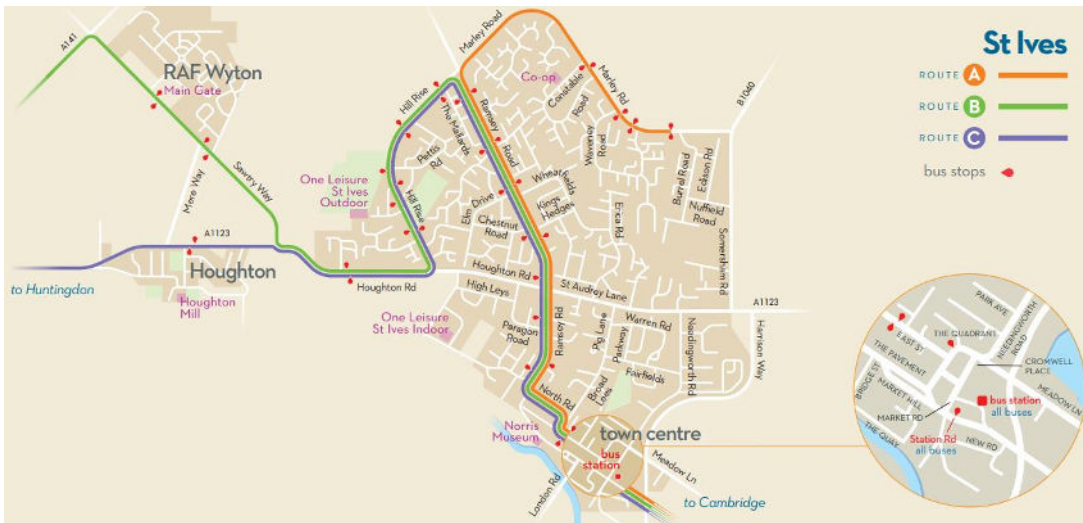
Up to date timetable documents are also available by clicking on the respective services on the overview route map, which is an intuitive and helpful feature. However, these timetables do not take advantage of the web page format to provide easier to interpret service information. There are inconsistences in colour, font, and style between the service maps and timetables, limiting their effectiveness. Timetables are also offered in a confusing format, with each individual service shown despite the services following a consistent clockface pattern, resulting in a dense 28-page full timetable.

Timetable report																		
Fenstanton - Busway A / B / C																		
Cambridge - St Ives - Huntingdon																		
From 30 October 2022																		
MONDAY - FRIDAY																		
Service No		B	B	B	B	B	A	B	A	B	A	B	A	A	B	A	A	B
Trumpington P&R	Dep						0630		0650		0710		0730	0740		0750	0800	
Addenbrooke's Rosie Maternity Unit	Dep																	
Addenbrooke's Outpatients							0640		0700		0720		0740	0750		0800	0810	
Long Rd 6th Form College	Dep																	
Cambridge Rail Stn Stop 9																		
Cambridge Rail Stn Stop 9							0650		0710		0730		0750			0810		
Drummer St Bus Stn Bay 12	Dep					0655		0715		0735		0755			0815			0835
Cambridge New Square							0705		0725		0745		0805			0825		
Cambridge North Station							0707		0727		0747		0807			0827		0847
Cambridge Science Park							0710		0730		0750		0810			0830		0850
Orchard Park West							0720		0740		0800		0820			0840		
Longstanton P&R							0721	0731	0741	0751	0801	0811	0821	0831		0841	0851	0901
St Ives P&R							0731	0741	0751	0801	0811	0821	0831	0841		0851	0901	0911
St Ives Bus Station Bay 4	Dep	0615	0635	0655	0715	0735	0745	0755	0805	0815	0825	0835	0845		0855	0905		0915
St Ives Hill Rise Ansley Way		0624	0644	0704	0724	0744		0804		0824		0844			0904			0924

6.2.2   Case study: Wiltshire Faresaver[34][35]

Faresaver is an independent bus company that operates routes in Wiltshire radiating from Chippenham and Melksham. The operator runs around 40 services in the area and has produced high quality bus timetables and maps to help users navigate its largely rural service area. Timetables match the purple and white colour scheme of the bus livery, with familiar fonts and slogans. Additionally, individual route maps are included in the timetables for most services.

These timetables can easily be accessed on the operator website, as well as being offered in print form onboard the buses themselves. Town-level route maps are also provided on their website, for each of the town centres that the company operates in. These provide helpful

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[34] Bus and Train User. *F is for Faresaver*. 2023. https://busandtrainuser.com/2023/03/23/f-is-for-faresaver/

[35] Faresaver. *Melksham Town Map*. 2023. https://www.faresaver.co.uk/route-maps/Melksham-Town-Map-Approved.pdf

contextual detail for bus users to identify transfer opportunities and locate their nearest services to origin and destination points. While these are helpful, service provision could be further improved by offering a stylised overview map to show the extent of connections between town centres and around the surrounding areas. These are both shown in Figure 6.3 and Figure 6.4.

Figure 6.3: Printed bus route map and timetable for Wiltshire Faresaver services.

Figure 6.4: An example of a detailed town centre map within Wiltshire.

An extra piece of valuable service information provision is the local branding of bus stops across the Faresaver network. In partnership with Wiltshire Council, the bus stop signs carry purple branding and the Faresaver logo, alongside route number placards and printed timetables at key locations.

Figure 6.5: An example of a Faresaver bus stop plate and bus shelter.

6.3   Reaching all audiences

With the advent of digital timetabling and journey planning solutions, bus and train operators have reduced the amount of information available via physical and alternative media. Online journey planning, whether hosted on operator or transport authority websites or through third-party sites like Google Maps and Traveline, make it easy to plan a journey from origin to destination. Using these journey planners does not require a wider understanding of the transport network and allows users to easily access information about the quickest way to get from A to B on an operator's services.

However, much like wayfinding signage requires inputs not only at decision points and intersections but also at consistent confirmation points along the way, bus service information provision cannot rely solely on a good journey planning engine. Bus stops need to have up to date service information to match that provided on online platforms. Physical service information is free and self-fulfilling advertising and branding. A bus stop flag with the operators' branding, and potentially with the local transport authority's logo, is much more enticing and visible than standard bus stop signage often applied in rural areas.

This is even more important for bus users that have not planned their journey using online journey planning services. Regular users may be able to navigate to and from stops and across the network without much signage or visual clues, but this can be completely mystifying to non-users. Digital exclusion refers to those who has no access to the internet, whether due to access or choice. Digital disadvantage refers to someone who has limited online exposure, using mobile data and applications once a week or less.

In a 2022 study, Transport for the North found that while the growth in using digital media for bus service information has been advantageous for money, it risks leaving certain groups of bus users behind, including the elderly and those on low or no incomes who may not have access to a smart phone, particularly as bus operators pivot to focusing on maintaining digital timetables and are less concerned about maintaining printed timetables and comprehensive service information at bus stops.[36] Service and route information and real time arrival information screens should therefore still be provided at as many bus stops as possible.

Additionally, education, literacy and digital literacy are also determinants in how people can access information about bus services. For example, 5.1 million adults in England are functionally illiterate[37], making it difficult to access information via digital media and reliant upon visual service information at the point of service, i.e., bus stops. These barriers for some in accessing service information are compounded as many LTAs and operators look to incorporate smart-phone led Mobility as a Service (MaaS) or Demand Responsive Transport (DRT) offerings to address low population densities in rural areas. This will mean that DRT services need to be promoted in a variety of ways and with various ways of rides being booked – most likely via an app, website or telephone.

London TravelWatch has published a report on digital exclusion, with surveys carried out in the second half of 2022.[38] In London alone, 2021 data suggests that around 3% of residents are completely offline, with nearly 20% (2 million residents) being on the spectrum of digital disadvantage. With those who are digitally excluded or disadvantaged more likely to be older, white, and of lower income, it is expected that the density of disadvantage will be higher in more

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[36] Transport for the North. *Transport-related social exclusion in the North of England*. pg 47. 2022. https://transportforthenorth.com/strategy-and-evidence/

[37] [37] Government Office for Science. *Inequalities in Mobility and Access in the UK, 2017 to 2040*, page 39. 2019. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/784685/future_of_mobility_access.pdf

[38] London Travel Watch. *Digital Exclusion and Disadvantage in London Transport*. 2023. https://www.londontravelwatch.org.uk/wp-content/uploads/2023/03/Left-Behind-Londoners.pdf

rural areas. In particular, it should be noted that public transport services in Greater London are substantially more comprehensive than those offered in many areas of England outside of London, and so awareness of and access to service information in these areas may be even more restricted given that access to nearby bus services is far less likely.

Edinburgh Waverley bridge bus service information point[39]

Lothian Buses in Edinburgh provides a clear and visible service network overview map immediately opposite the exit from the main railway station. Locals and tourists exiting from the station onto the Waverley bridge (a main thoroughfare between Old and New towns) are immediately presented with Lothian Buses branding and information. Even for those who do not travel by bus, the presence of the map in such a prominent public space increases their awareness of the services and could make them consider using the bus in future. For infrequent users in the city centre, the map provides an easy reference point to identify the best route to their next destination.

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[39] Google Maps. *Waverley Bridge.* 2021. https://www.google.co.uk/maps/@55.9521402,-3.1919887,3a,75y,217.08h,84.45t/data=!3m6!1e1!3m4!1s-qtgIhCka0BtBh0e8uZ2_A!2e0!7i16384!8i8192

7   Personalised user expectations

Having committed to a good service and customer experience, services must live up to the expectations. A poor travel experience generates more social media presence than a good experience, for example. The service therefore needs to be of a consistent quality with any problems being rectified as soon as possible. Examples include dealing directly with customers the same day with a process that includes apology, explanation and how the problem will be avoided in future. This level of customer service supports a healthy business. This forms the "people" component of marketing and is also related to the process developed as part of the customer's experience, and ongoing promotion of services.

A variety of media is available to communicate with bus users and potential users. A proportion of users will not be connected via digital media so making contact with them needs to be clear and conspicuous. For those with social media, smart phone apps and online links, there is an expectation that there will be an instant response and many operators employ specialist staff in their customer communications teams to achieve this. It is beneficial to co-locate such communications staff with operations staff so that any issues can be resolved quickly with the accurate and appropriate information being relayed effectively back to bus passengers.

Effective relationships with customers can be maintained by social media, email, telephone or by post. However, many operators continue to make it as difficult as possible for users to make contact with them. To reinforce their commitment to customer service, online forms should be replaced by named email and social media contacts, and as many customer touchpoints as possible should be provided. Regular or occasional dialogue with users reinforces their commitment and helps to identify any problems that may have arisen. This could be especially aimed at new users but maintaining regular customer contacts should not be overlooked.

7.1   Engaging with customers and encouraging feedback

Operators and LTAs should keep users highly engaged and seek continuous feedback to ensure both parties have a better understanding of customer needs and any potential concerns. There is always room for improvements and suggestions from users is an efficient and collaborative way to achieve this. By actively seeking feedback from customers, operators will likely gain a wider range of customers' experiences – both the positive and negative – and understand how these compare to each other overall. Generally speaking, customers are unlikely to voluntarily provide feedback unless it is to complain or provide other negative feedback.

Primarily, a strategy should be developed in the form of a campaign, to make existing and potential users aware of the bus system which includes the website, mobile apps, social media accounts and the service itself.

As with other aspects of marketing, this strategy could include alternative means of engaging with existing and potential users in different ways. For existing users, more involved feedback mechanisms could include a loyalty programme with rewards, providing, for example, a free bus ride after 10 trips within a certain period. This could be unlocked once they have provided quick feedback on a short survey. These questions could include:

● Degree of satisfaction with the service;

- What went well or has been improved since last time they used the bus (number of options to tick). This way people will feel that complaints have been heard;
- What can be improved (number of options);
- Whether they would use the bus again; and
- Would they recommend to someone else to try it.

For potential bus users, part of the strategy should include the encouragement of people to sign up via the website or the corresponding mobile app and in return a promotion code will be provided for a certain number of free rides or for a certain short period to encourage bus use for potential bus users.

After this is achieved to a satisfactory level, operators and LTAs will be able to ask for feedback from all users that have signed up for the bus service. This feedback request however needs to be set up with as few friction points as possible. This could therefore mean direct, single-question pop-ups on website or apps, or staff interviewing people with short surveys at bus stops while they wait for buses.

7.2 Websites

A well designed, simple to understand and use website will enable people to access it without hesitation. Websites should be easy to find (i.e., with a straightforward, memorable URL) and navigate. From the home page there should be direct links to areas of the website that provide information for the following customer service matters:

- Accessibility and assisted travel
- Lost property
- General feedback
- Refund

In addition to this, there should be a Frequently Asked Questions (FAQ) section on the website that will probably provide an answer to the most common questions that old and new users might have regarding bus use.

In case the answer people are looking for is not included in the FAQ section, the website should provide all relevant links to social media, emails and contact numbers. Dedicated and trained customer services staff should be ready to respond quickly, provide answers and help users with their queries. Bus users could also use these links and contact details to report problems or complaints based on their day-to-day use.

7.3 Social media

Operators should make use of mainstream social media platforms such as Facebook, Twitter, and Instagram to promote bus services and provide service updated. A typical social media strategy will involve regular sharing of pictures and videos of buses, promotion of specific routes and schedules, and positive engagement with potential customers by responding to comments and messages.

Importantly, social media should also be used to disseminate service disruptions as this is where customers are most likely to see it first. Cross-promoting social media channels at bus stops and on buses will raise awareness of these platforms for customers and improve the effectiveness of communicating in customers.

7.4 Help lines and call centres

While many people choose to use email and social media to contact bus operators, it is essential that the business is contactable by telephone to account for the needs of people who are illiterate, digitally excluded, or face other barriers to using the internet. In times of urgency or particular frustration, being able to speak to a representative of a bus operating company to resolve an issue can help to allay concerns with the delay that often occurs in responding to emails or via social media.

Operators should therefore provide dedicated call centres with staff that have undergone phone manner and technical training, and apply a call back strategy for customers during periods of high call volumes instead of expecting customers to wait in a phone queue.

7.5 Bus station and on-board staff

Well trained drivers and informed staff at certain bus stations could help users reach their destination, answer questions and provide updates for any disruptions or amended timetables and journey times. Bus drivers, as representatives of bus operating companies, should be trained in customer service training as part of their overall driving training.

Customer service is important as:

● Happy customers become brand advocates;
● Remarkable customer service is a competitive advantage; and
● Great customer service increases patronage retention.

7.6 Other areas benefitting from marketing improvements

Multiple other bus journey aspects can benefit from greater marketing and improvements, which can be difficult to prioritise effectively as LTAs and operators. Ensuring that an effective and wide-reaching passenger engagement forum is set up can provide ongoing feedback and engagement between bus users and operators. Alongside user market segmentation analysis (covered in Section 2.1), user forums would help to inform areas of concern and success which could benefit from investment or marketing campaigns. These forums need to be accessible to all user groups and should ideally reward passengers' involvement in them.

South Yorkshire Passenger Transport Executive (SYPTE)[40]

Passenger user groups are often inaccessible to some passengers, particularly younger users (partly due to the times that meetings are held). Ensuring that access is possible to all users, and sufficiently advertising the user groups could increase younger users' satisfaction with bus services. SYPTE found much higher engagement from young people when new user group meetings were better set up for younger users during the school holidays.

SYPTE runs other user groups targeting specific sectors of the market. Alongside regional district user group meetings, there are groups focused on passengers with reduced mobility and other disabilities in many cities across the SYPTE area.

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[40] Transport focus. *Making bus a better choice for young people*. 2023.
https://d3cez36w5wymxj.cloudfront.net/wp-content/uploads/2019/05/16190124/Making-bus-a-better-choice-for-young-people-FINAL-WEB-VERSION.pdf

8   Summary

Any approach to marketing of bus services should consider the 7 Ps of marketing: product, price, place, promotion, people, packaging, and process. Combined, these elements provide an evidence base for the need for a bus service, where the bus service should be provided, what it should offer, its visual identity, the customer experience, advertising and promotion of the service and customer service support to address any issues. By diligently implementing a marketing approach that considers each of these elements, bus operators and LTAs should be able to implement new or improved bus services that result in higher service patronage.

Marketing for bus services is closely related to travel demand management (TDM), in that it is the development of a specific service offering and targeted messaging to encourage mode shift from private vehicles to more sustainable modes of transport. Advice contained in this note that applies to broader marketing of bus services should also therefore be considered appropriate for TDM programmes.

The key steps outlined in this note regarding the marketing of bus services are as follows:

1	**Identifying potential users**	Undertake market research of both existing users and non-users to understand why people do or do not catch the bus. Establish your key market user groups to target through your service based on user groups that are most likely to use bus services.
2	**Identifying aspects of journeys that would appeal to different user groups**	Analyse the market research to determine what the friction points are for the different user groups with regard given to the specific bus network or service that you are managing.
3	**Developing a product that attracts and retains users**	Refine your service offering to appeal to potential bus users and existing users to maintain and increase patronage.
4	**Establishing an effective brand**	Determine what the visual identity of your bus service will be. This will enable potential users to quickly identify your bus service and associate it with your unique selling proposition. Establishing a strong, familiar brand for users to increases trust in the bus service and contributes to increased patronage.
5	**Presenting service information in a coherent way**	Closely related to branding, presenting service information in a consistent, coherent manner makes it easier for users to find information on services and ultimately use that service.
6	**Personalising the user experience**	Having reliable customer-facing staff who can support bus users in having a seamless journey is the final essential component of marketing as it is following through with the promise of the service offering that is advertised through promotion and branding.

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