

6. Public transport information and marketing

6.1 Introduction

In recent years in the UK, bus service improvements have often taken the form of a package – called a quality bus partnership– encompassing improvements to infrastructure and services as well as information and marketing. Quality bus partnerships involve partnership agreements (either formal or informal) between bus operators and local authorities, where both sides agree to implement measures which will contribute to shared objectives. Not surprisingly, the literature reflects this focus on quality bus partnerships, in that analyses of bus improvements tend not to disaggregate the effects of the different measures, but to report overall impacts. In section 6.2, we review the evidence about the overall impact of quality bus partnerships. Subsequent sections look briefly at the marketing of rail services and the impact of public transport ticketing schemes. We also summarise evidence from the literature on what proportion of new public transport trips would have been made by car in the absence of public transport improvements or marketing. Finally, our case studies, and other material gathered during the process of case study selection, offer insights into the specific contribution made by information and marketing measures within a comprehensive package of hard and soft measures.

6.2 Literature evidence on the impact of quality bus partnerships

Three documents give an overview of the success of recent quality bus partnerships: a survey by LEK for the Commission for Integrated Transport, which looked in detail at 11 schemes (LEK / CfIT 2002); a report by the consultancy TAS, which surveyed all the quality partnerships in Britain in 1999, and again in 2000 (TAS 2001); and a report from the Confederation of Passenger Transport (CPT 2002), which includes examples of patronage growth not reported by TAS or LEK. These, and some additional data from reports by Mackie et al (2002), Daugherty et al (1999) and Stagecoach (2002), were in turn summarised by Sloman (2003).

The LEK research examined 11 un-named urban quality partnerships, and found that most schemes (nine out of the 11) delivered increases in patronage of between 7% and 30%. These schemes incorporated a variety of measures: bus lanes, other bus priority measures, low floor buses, more frequent services, real time information, marketing, and higher parking charges. One scheme performed much better than any of the others, with an increase in patronage of over 90%. This was the only scheme to include a guided bus-way, and was also the only one to be associated with a park and ride service. One scheme had much less impact than the others, with patronage rising only about 4%. This was the most limited of all the schemes, involving the introduction of low floor buses and some bus priority measures but no new bus lane.

The TAS research suggests that differences in passenger growth figures are linked to the extent of a quality partnership scheme. It finds that quality partnerships involving

only minimal investment in new infrastructure will, on average, deliver revenue and patronage increases of 5%. Where a comprehensive route upgrade is carried out, patronage and revenue can be expected to rise by around 15%, and with very high quality schemes the average increase will be around 30%, with some schemes achieving increases in revenue as high as 45%. However, other factors outside a quality partnership will also affect its impact: for example the level of parking charges or availability of parking; levels of congestion; or competition with other modes such as cycling or light rail. Table 6.1 shows the TAS analysis of the possible range in passenger growth according to these external factors and the extent of the quality partnership itself.

Table 6.1: Expected increases in revenue and patronage for quality bus partnerships

| Improvement type | worst case | average | Best case |
|--|------------|---------|-----------|
| Minimal infrastructure improvement | -25% | 5% | 10% |
| Comprehensive conventional route upgrade | 5% | 15% | 50% |
| The 'X' factor: something better than a conventional route upgrade | 20% | 30% | 45% |

Source: TAS (2001)

Several studies suggest that although some growth in bus use is usually seen quite quickly after improvements are made, passenger numbers typically take up to two years to peak. It takes time for improvements to 'bed in' and for passengers to change their existing travel behaviour and try the new service. For example passenger numbers on Line 33 in the West Midlands increased by a fifth shortly after the quality partnership began, but, 18 months later, bus use had increased by 40%. Similar tendencies for longer term behaviour change to be greater than short term change have been reported from studies analysing responses to altered bus fares, as discussed in section 6.4. Meanwhile, TAS suggests that after two years, patronage increases may level off, or even decline, if no further improvements are made. They argue that in a climate of continually rising consumer expectation, local authorities and bus operators must 'refresh the quality bus product' every five years in order to achieve continuing increases in passenger numbers.

Table 6.2 shows the patronage increases achieved by a variety of quality bus partnerships, as reported by LEK, TAS, CPT and others. Where possible, results have been disaggregated into those about short-term change ('initial' increases, or those occurring in 15 months or less) and medium term increases (those occurring after 18 months or longer, or studies which simply reported the 'overall' effects of schemes).

Table 6.2: Impact of quality partnerships on patronage in individual corridors

| Location | Description | Short-term patronage increase ¹ | Medium-term patronage increase ² | Proportion switched from car | Source |
|---------------------------------------|--|--|--|------------------------------|---------------------------------|
| Review of 11 bus quality partnerships | Bus lanes, low floor buses, more frequent services, real time information, marketing | | Most in range 7 – 30% (guided busway 90%; one scheme only 4%) ³ | Estimate 10% | LEK / CfIT (2002) |
| Birmingham | Line 33 | 20% | 40% | 10% | TAS (2001) |
| Birmingham | Superline | 18% | | | TAS (2001) |
| West Midlands | Primeline | | 5% | | TAS (2001) |
| Birmingham | three Showcase routes | | | 29% | CENTRO, in Mackie et al. (2002) |
| Cheltenham | Service 2 | 5% | | | TAS (2001) |
| Edinburgh | Greenways schemes | | 7 – 15% | | TAS (2001) |
| Hertfordshire | Lea Valley Green Route | 20% | | | TAS (2001) |
| Hertfordshire | Elstree and Borehamwood Network | | 20% | 3% | TAS (2001) |
| Ipswich | Superoute 66 (guided busways) | | 75% | 33% | First, in CPT (2002) |
| Leeds | Scott Hall Road (guided busway) | | 75% | 20% | First, in CPT (2002) |
| London | Route 220 (Harlesden – Wandsworth) | | approx 30% ⁴ | | Daugherty et al. (1999) |
| London | Uxbridge Road | | 26% ⁵ | | Daugherty et al. (1999) |
| Nottingham | Cotgrave Connection | | 10 – 15% | | TAS (2001) |
| Nottingham | Calverton Connection | 29% | 48% | 25% | TAS (2001) |
| Perth, Scotland | Stagecoach Kickstart pilot | | 63% | | Stagecoach (2002) |
| Portsmouth | Portsmouth – Leigh Park service | 25% | | | Stagecoach, in CPT (2002) |
| Rotherham | Rotherham – Maltby services | | 17% | | First, in CPT (2002) |
| Sheffield | X33 to Bradford | | nearly 50% | | Arriva, in CPT (2002) |
| Telford | Redline | | 46% | | Arriva, in CPT (2002) |
| Telford | Blueline | 12% | | | Arriva, in CPT (2002) |
| Woking | Route 91 | | 22% | | Arriva, in CPT (2002) |
| AVERAGE | | 18% | 36% | | |

Reproduced from Sloman (2003)

¹ Patronage increases are considered short-term where they are described as “initial increases” or are for a period of 15 months or less.

² Patronage increases are taken as medium-term if the time period quoted is 18 months or longer, or if it is unspecified.

³ LEK / CfIT (2002) data are not included in calculation of average patronage increase, since the unnamed schemes analysed by them may duplicate the named examples.

⁴ Daugherty et al. quote ‘an increase of an average of about 7 to 15% per annum compared to the fleetwide total from about the middle of 1994 until the end of 1996.’ Taking a middle figure of 11% per annum over 30 months gives an increase of 30%.

⁵ Daugherty et al. quote an increase in patronage of ‘almost 30%’ compared to a 4% patronage increase on control routes.

The highest performing schemes (patronage +75%), in Leeds and Ipswich, involved construction of dedicated guided bus-ways.

The next highest passenger increase (an increase of 63%, which was around double the average increase) was achieved in Perth, Scotland, where the bus operator doubled bus frequencies, introduced low floor buses, simplified the fares structure and carried out a door-to-door marketing campaign at the same time that the local authority introduced bus priority measures and new bus shelters. This scheme is particularly interesting from the perspective of the current study, as it offers evidence of synergy between soft measures (in this case a marketing campaign) and hard measures. Further information on the Perth experiment was gathered as part of our trawl for in-depth case studies, and is reported later.

Taken together, the listed schemes have increased bus use by an average of more than a third (36%). If the guided bus schemes in Leeds and Ipswich are excluded, the average increase in bus use is slightly lower but still substantial, at 30%. More information would be needed to assess how much of this increase is the result of soft measures. However, we can conclude that the mix of hard and soft together is highly effective in increasing bus use.

6.3 Literature evidence on marketing of rail services

Our literature review primarily focussed on marketing of bus services, but two examples of marketing of rail travel are worthy of mention because of the involvement of public agencies as well as train operators.

First, we looked briefly at 'community rail partnerships', of which there are more than 30, primarily (but not necessarily) in rural areas, and mainly focussed on branch railway lines. These partnerships have sought to increase rail patronage through soft initiatives such as marketing; attractive branding (many lines are given a name reflecting the area through which they pass); changing to a regular clock-face timetable; refurbishing stations; and offering special ticket deals. Some have also increased service frequencies or introduced feeder bus services.

The Bittern Line provides one example of the increase in patronage that may be achieved as a result. This is a rail line between Norwich and Sheringham in Norfolk. After a period of steady decline, a community rail partnership was established for the line in 1996. A combination of effective marketing, upgrading and repair of stations, new signalling, a more frequent (hourly) service, a bus / rail link and other improvements turned the line around, and led to year-on-year growth of over 7% a year, totalling over 40% over five years (Meades 2002). The active involvement of the local community, the county council, and the train operator has been critical to the success of the line. The success of the Bittern Line has prompted other community rail partnerships to be established in the region, including the Wherry Lines between Norwich, Great Yarmouth and Lowestoft, where a partnership established in 2000 is starting to generate growth of between 5% and 7% a year.

Second, information on an awareness campaign launched jointly between the Highways Agency and operator Great Eastern Railways in June 1998 is reported by Crampin (1998). This was aimed at persuading people to use the train rather than the

car for trips along the A12 corridor near Chelmsford. The campaign coincided with the introduction of an improved rail timetable. Posters and leaflets were distributed, an ad-van (moving billboard) was driven around the town, and local radio, newspaper and bus side advertisements were also used. Posters included the words 'over 1 hour by car, only 35 minutes by train, what's stopping you!' They carried the logos of both the Highways Agency and First Great Eastern. An evaluation of the campaign by Oscar Faber showed the following:

- awareness of Great Eastern services amongst non-users increased by 11%, and 40% of those surveyed recalled the advertisement used in the campaign.
- Business at Chelmsford Station increased by 12%, there was a 17% increase in the number of standard return ticket sales, and weekly season ticket sales were up by 31% compared to August 1997.

Assessment of the campaign also suggested that there were perceived to be three major positive elements - the campaign was perceived as conveying a strong environmental message; Great Eastern was perceived to be working hard on improving services; and the partnership with the Highways Agency was regarded as positive. (This campaign is also discussed in Chapter 7).

6.4 Literature evidence on the impact of ticketing schemes

The effect of fares on public transport patronage has been subject to a long history of research and analysis. Moreover, as analysed by Dargay and Hanly (1999), longer-term responses to changes in fare levels are typically substantially greater than short-term responses. This finding was recently endorsed in a major review of factors affecting public transport demand undertaken by Balcombe et al (2004). It increases confidence in the findings about short and long term behaviour change in response to quality bus partnerships reported in section 6.2.

As well as interest in specific fare levels, there is also interest in how fares, and associated ticketing, are structured - what we term here 'ticketing schemes'. This refers to initiatives where passengers can buy more than just a single or return ticket for a particular journey, instead buying some kind of pass or card or discounted ticket book, that potentially allows access across different operators or types of public transport and/or is valid for a particular time period or geographical area and/or is transferable between individuals. To some extent, ticketing initiatives are about finding an alternative way of marketing services, and are often discussed in association with, or as part of, public transport information and marketing initiatives. They usually aim to simplify ticketing arrangements in some way, and often reduce the need for passengers to make complex calculations when costing their proposed travel.

Balcombe et al (2004) gave some consideration to different ticketing systems. They state: 'it has often been found that patronage increases, following introduction of [a] travelcard, suggesting that it does stimulate demand'. As one example, they quote a study by Gilbert and Jalilan (1991) about the introduction of travelcards in London, which reported that travelcard introduction led to a 10% increase in the number of underground trips and a 16% increase in bus trips. Balcombe et al also mention patronage increases from the introduction of flat fares in Brighton, as discussed later in this chapter.

Some other commentators have also discussed the impact of ticketing schemes on public transport patronage. FitzRoy and Smith (1994) argue that the introduction of a transferable season ticket, or 'rainbow card' (Regenbogenkarte) was the main factor responsible for stimulating public transport passenger growth in Zürich during the late 1980s. Following a period of relative stability, passenger trips there grew by a third (from 210 million to about 280 million trips a year) between 1985 and 1990. The rainbow card was valid on all modes of public transport, and was transferable to family and friends.

A similar effect was observed in Freiburg, where an 'environmental travel card' (Umweltschutzkarte) was introduced in 1984. In the fifteen years before 1984, public transport demand was roughly constant at about 30 million trips per year. Between 1983 and 1995, public transport patronage increased by an average of 7.5% per year, rising from 27.7 million trips per year to 65.9 million trips per year (FitzRoy and Smith, 1998). Over the same period, the population of the region grew by 13% and car ownership grew by 26%. However, car modal share remained constant and the modal share of public transport increased. The environmental travel card was cheaper than the monthly card it replaced, and, as in Zürich, could be used by friends and family members as well as the ticket holder. In the first year of operation of the environment card, an estimated 3000-4000 regular car drivers switched to public transport.

As with quality bus partnerships, it is unclear what proportion of the increase in public transport patronage reported in these cities is due to hard factors (in this case, an effective reduction in the cost of public transport travel), and what proportion is the result of the soft benefits offered by a transferable, multi-mode travel card.

6.5 Literature evidence about transfer from car to public transport

Any increase in public transport patronage (whether due to hard or soft interventions) is likely to be due to a combination of factors, including people making new trips which previously would not have been made; switching from other public transport routes or from walking or cycling; and switching from travelling by car, either as a passenger or as a driver.

Mackie et al. (2002) quote research based on surveys of 2000 travellers which found that 32% of urban bus users were abstracted from the car, and TAS (2002) report that surveys of quality bus partnerships show around 33% of new bus users had previously travelled by car. Data from six of the quality bus partnerships listed earlier (in table 6.1) suggests that typically, somewhere between 10% and 30% of new bus passengers were former car users, with a bias towards the higher end of this range, (although there is one further case where the figure was just 3%).

6.6 Selection of public transport information and marketing case studies

As already discussed, one of the difficulties in evaluating the impact of public transport information and marketing schemes is that they tend to form part of larger packages of measures, including infrastructure and service frequency improvements,

rather than being implemented on their own.

It should also be noted that public transport information and marketing is often a significant component of (secondary) school and workplace travel plans; usually takes place as part of personalised travel planning; can form the focus for travel awareness work; and is associated with initiatives such as car clubs. The strong synergies with many of the other soft measures are discussed further in section 6.12.

In drawing up a list of prospective case studies for this chapter, we looked at three types of initiatives:

- Marketing or promotion of a specific route or routes, or of services to a particular destination. In our initial trawl for information, we collected data about a direct marketing campaign in Perth, Scotland, and also data about the marketing of more sustainable ways of accessing the Farnborough Air Show in Hampshire. We also gathered information about route-based promotion as part of one of the Buckinghamshire case studies, and some information on synergy between individualised marketing and bus improvements as part of the personalised travel planning case study in Bristol.
- Personalised marketing of an entire public transport network. One example of personalised area-wide marketing of public transport was examined, namely the Travel Options Planning Service, TOPS, run by South Yorkshire Passenger Transport Executive (SYLTE).
- Area-wide public transport marketing, promotion and re-branding. Here, we considered initiatives in Cambridge, Nottingham, Brighton, Bristol, London and the North York Moors National Park.

The selected case studies were the SYLTE personalised marketing scheme and city-wide public transport promotion in Brighton and Nottingham. Our information about the other schemes (mostly collected in spring 2003) is briefly summarised below, whilst our chosen case studies are described in section 6.7.

6.6.1 Perth, Scotland, direct marketing campaign

Stagecoach ran a marketing campaign to encourage increased bus use on a poor performing, low frequency bus route in Perth with a profile of aged owner-occupiers with high car dependency. Marketing was accompanied by service improvements: frequency doubled, low floor buses were introduced, fares were simplified and the council introduced bus priority measures and new bus shelters. The marketing included launch publicity, door-to-door interviews with potential customers, the offer of free trips, and promotions such as children's competitions and pensioners' lunches. This was followed by a telephone-based direct marketing campaign targeted at non-users.

Passenger growth was 56% over the first two years, and on course to be 63% over three years. There was evidence of modal shift from car to bus. The telephone marketing campaign resulted in conversion to public transport of 7-8% of those non-users contacted. RossCraig of Stagecoach points out that this is a high figure for direct marketing – the Direct Marketing Association response rate survey 2003 quotes average response rates for comparable telephone campaigns of 4.9% . The people 'converted' to public transport were all ABC1s – that is, people who might be

expected to be difficult to convert.

As discussed in section 6.2, the 63% patronage increase is roughly double the average increase for a conventional quality bus partnership, suggesting that a large part of the effect was because of the novel features of this scheme - in particular, the direct marketing.

6.6.2 Farnborough Air Show

Farnborough Air Show takes place in Hampshire every two years, and attracts around 300,000 visitors, including the general public, trade visitors, exhibition staff and others. Associated traffic problems have led to the incremental development of a surface access travel strategy. This has included a number of different components, including, for example, the introduction of shuttle buses from three local rail stations, promotion of rail / shuttlebus and coach options in publicity for the show, new train services for Air Show visitors, promotional work with train operators, better pedestrian and cycle facilities, ending the promotion of free parking and reducing parking at the site and closing local roads. One important element has been the introduction of 'through ticketing' – where visitors can buy a ticket from anywhere in the UK which includes train and bus fares and the show entrance fee. By 2002, 14 train operating companies were offering through ticketing, which is seen as an important element that has encouraged modal shift. Over successive shows, congestion has been reduced to the point where driving times to the show from the nearest motorway exit have dropped from an average of 1.5 hours to only 10 minutes. Shaw (2004) comments that soft factors have had an enormous influence on travel demand, and that traffic congestion for this major event has been eliminated.

6.6.3 Buckinghamshire public transport promotion

In Buckinghamshire, the Travel Choice team which is responsible for workplace travel planning is also involved in public transport promotion and marketing. The Buckinghamshire workplace travel plan case study thus provided useful information about the impact of a recent public transport marketing campaign. Red Route 9 was launched in February 2003, and runs between Aylesbury town centre and Stoke Mandeville Hospital. Red Route 9 buses have a distinctive livery and branding, which includes information about the route and the words 'every 10 minutes' on the side of the bus. The council produced a glossy timetable booklet, which was intended to look aspirational and 'like a Mercedes advert'. This and a personal letter from the council's chairman of transportation was sent to all 5000 people living within 500 metres of the route, encouraging them to try the service. The council was planning to send a one-week free 'trial' ticket to people who had not yet tried the service.

The marketing on Red Route 9 was preceded by a number of infrastructure improvements: a bus lane (or 'red carpet into town') introduced in 2001, which cost £2.5 million; individual signs at bus stops, with a bus stop name, timetable and route map; new shelters and seats; and Kassel kerbs. There have been some problems with the public transport infrastructure - in particular, at the time of the interview, real-time information screens had been out of action for the past two years.

Patronage on Red Route 9 did not significantly increase after the new infrastructure improvements were put in, but in the two months after the marketing work, the number of bus passengers went up by 28%. Figures for December 2003 indicated an overall patronage increase of 42%. As in Perth, this suggests that promotion and marketing can greatly increase the effectiveness of conventional public transport infrastructure improvements.

6.6.4 Bristol VIVALDI project

The Bristol personalised travel planning case study reported on an individualised marketing scheme which took place at about the same time as public transport improvements on a bus 'Showcase' corridor. Monitoring surveys conducted 10 months apart found that the public transport mode share increased from 9% to 11% in a control area which benefited from the public transport improvements but was not targeted by the individualised marketing campaign. However, this change seems to have been due to people switching from walking and travelling as a car passenger, as mode share for both these modes went down. There was little evidence of people switching from car driving to bus travel: car driver mode share in the control area increased from 45% to 46%.

Public transport mode share in the target area (which experienced both the public transport improvements and the individualised marketing), and which was monitored over the same 10 month period, increased by double the amount in the control area: from 9% to 13%. Here, car driver mode share also went down, from 45% to 43%.

This scheme suggests that public transport improvements on their own may have rather little impact on car driver mode share, as the increase in patronage may come mainly from people who previously walked or took lifts as a car passenger. Marketing (in this case individualised marketing) seems both to increase overall public transport patronage, and to attract trips that otherwise would have been made as a car driver.

6.6.5 Cambridge city-wide improvements

In Cambridge, Stagecoach achieved a 25% overall increase in patronage over a period of four months following the re-design of the city's bus network. The company reduced 12 or 13 services to a simpler six service network. Three services became 'turn up and go', with buses every 10 minutes between 7am and 7pm. (At the time of our communication with Stagecoach, in mid 2003, there were plans to increase frequency to every 7-8 minutes on one of the services because it had been so successful.) Other services now run every 30 minutes. The company publicised the service changes with glossy materials, including guides and maps for individual services and pocket-sized timetables. Park and ride buses were coloured blue, red or green depending on which park and ride site they served. 'Megarider' weekly tickets have become very cheap, and the popularity of Megarider and Dayrider tickets has meant that there are few cash-paying passengers, enabling buses to load more quickly.

6.6.6 London bus improvements

Bus use in London increased 31% over the four years to 2004 to 1702 million

journeys, the highest number since 1968. The key factor in this has been increased bus mileage of 20% in the same period. A study of bus use by Transport for London found that:

- The number of people who never used a bus fell from 29% three years earlier, to 21% in 2003.
- Half of the additional journeys were made by Londoners who did not use the bus at all three years earlier.
- Half of Londoners who had increased bus usage over the previous three years mentioned 'bus improvements' as a reason for this, with the vast majority agreeing that 'there are more buses about', 'buses are better value for money', 'buses are newer', 'buses are easier to get on / off' and 'travel information has improved'.

As well as the increase in bus mileage, Transport for London points to improvements in four key areas which it feels are likely to have played a major role in increasing bus use, including a number of information, marketing and ticketing initiatives, (Lea 2004). The main areas identified by Transport for London were as follows:

- Simple fares and ticketing: £1 flat fare; single zone bus pass; the Oyster smartcard which has been introduced across a range of ticket products and may be purchased by telephone, on the internet, at tube stations or at ticket outlets; and cashless operation on central London buses which has reduced boarding times.
- Better buses: 91% of the bus fleet is fully accessible; 50% of buses are fitted with CCTV cameras.
- Better information: stop-specific timetables, 'spider maps' at key locations, local area maps, and Countdown real-time information at 2000 stops.
- Perception: customer service satisfaction scores show rising satisfaction with information, cleanliness and condition of buses. The bus service is now the most reliable since figures were first collated in 1977.

6.6.7 The Moorsbus Network

Buses in the North York Moors National Park, run by seven different bus companies, have been given a generic 'Moorsbus' branding, to try and encourage visitor use, with marketing aiming to promote the idea that the bus offers a good alternative to the car. Other features of the marketing and information work include the presence of easily recognisable co-ordinators at key points across the park who can help with information and 'troubleshoot' any service problems; location specific timetables and simplified schematic network maps at every bus stop; discounts for bus users in shops, restaurants and attractions; and 'Moorsbus journey plans' with suggested itineraries for days out. The scheme encompasses over 200 different bus services.

According to Transport 2000 (2001), in 2001, the network was carrying 27,000 passengers a year. A survey undertaken in 2000 suggested that about a third of those who travelled on the Moorsbus had access to a car on the day of their journey.

6.7 Details of chosen public transport case studies

This section describes our chosen case studies in more detail. The public transport initiatives examined in the three case studies are of different types and on different

scales, and therefore difficult to compare directly. The South Yorkshire case study was focussed on one aspect of the PTE's information and marketing work, whereas the Nottingham and Brighton case studies looked at those cities' overall information and marketing strategies.

6.7.1 South Yorkshire PTE Travel Options Planning Service

In South Yorkshire, we looked at the PTE's Travel Options Planning Service (TOPS), which provides tailored, personalised travel information to companies, employees and individuals. This is part of a much larger programme of marketing and information provision, but whereas most of SYPTE's information materials are targeted at existing public transport users, TOPS is targeted at non-users of public transport. It was developed in 2001 with some funding from the European Regional Development Fund, and partly has a remit to assist with regeneration. SYPTE also has an agreement with its district local authorities to provide advice and assistance to companies that the planning system requires travel plans from, and TOPS helps with this. The TOPS service has evolved to include a wide range of services and products, such as:

- Personalised journey planners, which are offered to whole organisations, to new employees within client organisations, and to individuals. The service is being extended to job centres for people travelling to interviews, and to children moving up to secondary school.
- Discounted ticket schemes, such as the Flexi Master ticket, that offers 3 days travel in 7 to facilitate part-time working and the Eventmaster, where tickets can be bought in bulk for special events.
- Advice to companies about the production of travel plans and help carrying out travel surveys. At the time of the case study interview, this had been provided to 34 organisations covering about 70,000 employees.
- Area Travel Guides for nearly 400 areas, which are designed to answer the question 'where can I go from this location?', and are a marketing tool aimed at new users of public transport.
- Travel shows, offering face-to-face travel advice at recruitment fairs, company staff meetings and other events.
- Travel awareness training for people with mobility or learning difficulties, and for drivers and operators.
- A dedicated telephone enquiry service for TOPS clients.
- New services. Where TOPS has identified a demand not met by existing public transport, it has worked with bus operators and other partners to develop new services. Examples include the Manvers Shuttle – a service which operates to employment sites on former coalfields and to Dearne Valley College, and which is supported by contributions from local employers.

6.7.2 Public transport marketing and re-branding in Nottingham

In Nottingham, we looked at the re-branding and marketing of bus services by the largest bus operator, Nottingham City Transport, and some broader initiatives to promote public transport use, including the strategy of the city council to 'fill the gaps' between information services provided by individual operators. (The Nottingham public transport case study partly looked at the overarching 'Big Wheel' travel awareness campaign, which is discussed in more detail in chapter 7.)

A review for the city council had found that individual public transport operators provided good information in many different formats, so that once users were 'in the system' they could find the information they needed fairly easily. However, the review found that journeys involving more than one bus operator (20% of journeys), and new customers, were less-well catered for. This led the city council to prioritise actions focussed on interchanges and multi-operator route information, including:

- Development and use of the Big Wheel branding and logo to be used on all public transport information and displays as far as possible, to help with the perception that changes and developments in public transport services are part of a long term transport strategy for the city.
- Multi-operator interchange information. The council has ensured the provision of co-ordinated information at every bus stop on all the major corridors involving more than one bus operator. Bus stops are clustered to form mini bus stations. City centre maps indicating where to change buses are on the back of every bus shelter and on stand-alone panels around the city centre.
- Frequent high quality bus network. The bus network is organised into 18 high quality bus routes, each with a 10 minute frequency. A multi-operator approach is promoted on these routes.
- Sector Guides. The city is split into eight sectors, radiating out from city centre. The council plans to produce journey planning maps for each sector, one of which had been produced at the time of the case study interview.
- Themed maps, showing public transport links to all education sites, larger businesses, health sector sites and leisure and tourist destinations.
- Information provision in a range of formats, including guides for those with physical disability; blind people; those speaking minority languages; people who want to travel late at night; those on concessionary fares etc..

The council is also investigating electronic information provision and new forms of ticketing.

Meanwhile, the main bus operator, Nottingham City Transport, has shifted away from a predominantly engineering-based approach to one which is more customer-focussed, with greater attention given to marketing and promotion, and creation of a simpler, more easily understood network. These changes were partly prompted by falling patronage and concern that Nottingham's new tram system would abstract more passengers from bus services, and partly by the example of NCT's main competitor, Trent and Barton, which has a reputation for good marketing, promotion and branding.

The key changes have been as follows:

- Cross-city services were removed, so all buses now start and terminate in the city centre. This has improved reliability, as 30% of all congestion delays occurred in the city centre, yet only 3% of journeys went beyond the centre.
- Each corridor out of the city centre has been colour-coded, so all buses using that main route are the same colour. All bus stops serving routes along the same corridor are clustered and colour-coded.
- New 'Go2' services on main corridors run every 10 minutes, designed to offer a 'tram-like bus service'. Other less frequent neighbourhood services (rebranded the Nottingham Network) feed into the Go2 services.

The launch of these changes was accompanied by extensive marketing and PR work.

6.7.3 Public transport marketing and information in Brighton

In Brighton, we looked at the long-standing partnership between the city council and the bus company, Brighton and Hove Buses, which aims to make the bus network simple and easy to use. Working together in an informal bus quality partnership, the council and the bus company have developed an approach which involves a mix of hard and soft measures, with hard measures including improvements to services, infrastructure and parking enforcement. There has also been considerable investment in a bus priority information and management system, which now enables the provision of real time information at all major bus stops in the city. The partnership has been successful in increasing bus use by 5% per year for the last decade, very much against the trend of what is happening in other cities.

The soft elements of their approach include:

- 'Metro' branding. The five longest and most-frequent cross-city routes are branded as the Metro service. Other routes feed into this network. There is a tube-style map, and routes are colour-coded.
- A £1 flat fare for any bus trip was introduced in 2002 (increased to £1.20 in May 2003). Prior to the flat fare, fares were typically between 60p and £1.30 for a single journey. The flat fare is felt to have 'completely demystified the use of the bus'. Its introduction was heavily publicised on the sides of buses and through radio advertising. Other ticketing initiatives aimed at attracting bus users are a £2.40 one-day saver ticket and a scheme called 'Bus ID' which enables young people to travel for a 30p flat fare.
- Development of a customer service culture throughout the bus company, including a customer care training programme, at a cost of about £100,000 per year.
- A 'Bus Times' publication, which gives comprehensive information about bus services run by all operators. This is produced by Brighton and Hove Bus Company, but lists Stagecoach, Arriva and council funded services alongside their own.
- Two 'one-stop travel shops' selling tickets and information for all forms of public transport.
- A telephone helpline operated by council staff. It is also possible for travellers to make use of a regional telephone service (Public Transport Information 2000), which the council and the bus company are involved in.

Over and above these specific initiatives, both the local authority and bus company interviewees in Brighton felt that the broader public relations work in support of public transport was important to their success. This has involved developing a good relationship with the local media, so that they talk positively about the idea of public transport and generate a positive role for the bus company in the local community. The bus company interviewee described this sort of work as a 'very soft' factor, and commented: 'Brighton and Hove Buses have taken time to develop a positive culture, which is more than the Metro concept and the flat fare and publicity. It is creating that atmosphere that comes through. People know that they should be using the bus more. It is all part of placing yourself in the community as part of the fabric of the city'.

Some information was also provided about the 'Breeze Up to the Downs' initiative, a new network of three bus routes fanning out from the centre of Brighton and Hove to

popular countryside destinations. Promotion work has included carefully targeted radio advertising; advertising on other bus services; the production of individual route guides and advertising in association with rail marketing. Use of services is included in the one-day city saver ticket and real time information about services is available at most city bus stops. As part of encouraging use, vintage, open-top buses are used on the routes, as well as modern, low floor vehicles.

6.8 Staffing and budgets for public transport information and marketing

Table 6.3 summarises the staffing and budgets dedicated to public transport information and marketing in the three case study areas.

Table 6.3: Staff time and resources allocated to public transport information and marketing (summer 2003)

| | SYPTE (TOPS) | Nottingham | Brighton+ |
|--|----------------|---|--------------|
| Staff time in local authority / PTE | 7 [^] | 2.7 [~] | 1 |
| Staff time in bus company | Not relevant | 10 [#] | 1 |
| Local authority / PTE revenue budget in most recent year (including staff costs) | £176,000 | £85,000 | £60,000* |
| Local authority capital spending in most recent year | Not relevant | Average £220,000 per year over last 2 years | Not relevant |
| Bus company spending in most recent year | Not relevant | £250,000 | £225,000 |

+ Funding for specific initiatives, such as the Breeze up to the Downs project, Public Transport Information 2000, services for Sussex University and the bus priority and information management system are not included.

* This assumes an average staff cost of £25,000 per post.

[^] This only includes staff dedicated to TOPS, as opposed to those in the wider information team.

[~] Staff working on the Big Wheel campaign are not included, as this is a wider initiative.

[#] Call centre staff answering telephones in the Travelcentre are not included. Nor is the member of staff in this department who deals with software development for integrating schedules and rotas.

At the time of the interview, SYPTE was employing seven full-time staff to run the Travel Options Planning Service. This was an increase on the original four full-time posts dedicated to TOPS when the service was launched, and, at the time of the interview, included a bursary post funded by the Department for Transport. The Information and Development Team within which TOPS is located were also employing a further four staff responsible for other parts of their information service, such as producing in-house marketing, new timetable and leaflet products, databases and electronic information systems. The budget for TOPS was £176,000 in 2002/03, which is about 5% of the total budget for information and promotion within SYPTE, and about 0.2% of the PTE's overall budget. This figure includes staff costs.

In Nottingham, the city council was employing the equivalent of 2.7 full-time staff to promote public transport. Two appointments had been made within the last 18

months, and before this the council had no staff dedicated to promotional work. The council's promotional work had involved capital expenditure of about £440,000 over the past two years (on information panels, information 'drums' at bus stops, departure boards, and real-time information). Revenue expenditure in 2002/03 was £35,000 (for maps, timetables and other promotional material), plus about £50,000 staff costs.

Nottingham City Transport was employing about 10 staff on marketing and communications, not including travel centre staff. The budget for marketing activities was £250,000 in each of the last two years. This has covered production of timetables and bus stop information, Go2 advertising, radio adverts, poster campaigns, and various other activities. This was somewhat less than 1% of the company's budget.

In Brighton, there was one full-time post dedicated to information and marketing within the public transport team, which had 3.7 fte posts overall. The staffing level had been the same since the authority was formed in 1997. The council's public transport publicity budget was £35,000 a year in 2002/3 (not including staff costs, estimated at £25,000). This does not include payments for particular services from Sussex University, or from the Countryside Agency for the Breeze Up to the Downs initiative, or for specific initiatives such as Public Transport Information 2000 or the bus priority information and management system.

Brighton and Hove Buses had one full-time post dedicated to marketing and promotion, and this had been unchanged for many years. The company were allocating about £225,000 per year to publicity and marketing, which was about 1% of its budget.

6.9 The scale of public transport information and marketing work

The branding, marketing and information in Nottingham and Brighton is aimed at the whole population of each city, comprising 270,000 people and 250,000 people respectively. Both cities are also net 'importers' of large numbers of commuters, and also attract visitors. In Brighton, an estimated 8 million people visit every year.

The SYPTE TOPS service bears more similarity to travel planning or personalised travel planning, in that it is targeted at specific employers and individuals.

Between 2001 and 2003, TOPS worked with a total of 225 different organisations, including four local authorities, 13 organisations from the health sector and seven organisations from the education sector. Table 6.4 shows the scale of various activities carried out by TOPS between 2001 and 2003.

Table 6.4: Scale of various activities carried out by TOPS

| Type of Measure | Number of organisations [^] |
|---|--------------------------------------|
| Staff travel surveys and reports | 34 |
| Management presentations | 153 |
| Travel issues consultation | 183 |
| Travel awareness roadshows | 48 |
| Tailored promotions | 5 |
| Ticketing information provision | 220 |
| Timetable leaflets | 153 |
| Ticketing agency | 34 |
| Park and ride deals/ discounts | 8 |
| Organisation specific travel guides | 101 |
| Organisations offering Personalised Journey Planners for staff / new starters | 33 |
| Dedicated phone service to Traveline* | 9 |
| Modifications to existing services | 12 |
| Dedicated shuttle bus services | 13 |
| Company travel plans~ | 17 |
| Special ticketing products | 32 |
| Restricted parking/ car park charges | 7 |
| Improved pedestrian routes | 1 |

[^] Figures are for the combined number of organisations receiving the service in 2001/02 and 2002/03.

* This is a hash number on the company phone or a single button press that links the caller direct to Traveline.

~ Companies that have produced travel plans as a result of TOPS assistance.

Travel surveys have been carried out in 34 organisations covering 70,000 staff. This represents 14% of the workforce in South Yorkshire, and provides baseline information about initial travel habits.

Over 1300 personalised journey plans have been provided for staff in the organisations SYPTTE is working with. About three-quarters of these have been for staff in nine organisations that fund personalised journey plans for their staff on a subscription basis. In other cases, plans are provided to individual staff on a one-off basis, frequently free of charge. Table 6.5 shows the breakdown by employment sector.

Table 6.5: Number of employees receiving personalised journey planners

| Type of organisation | Number of personalised journey plans* |
|------------------------------|---------------------------------------|
| Hospitals (3) | 635 |
| Sheffield Hallam University | 35 |
| Local authorities (2) | 90 |
| Private sector companies (3) | 269 |
| Individuals | 335 |
| Total | 1364 |

*Figures are the combined total for 2001/02 and 2002/03. In addition to figures in this table, Meadowhall gave employees (and visitors) internet access to SYPTTE's Journey Planner. At the time of the case study interview, Sheffield University was putting its travel plan in place and had not yet taken up the personalised journey planning service.

The TOPS service has mainly concentrated on the journey to work and on large organisations. Small and medium sized businesses have proved difficult to reach. TOPS has also had a focus on newly developing centres of employment. There are plans to target the journey to school, people seeking or starting employment and people with mobility difficulties.

6.10 Public transport information and marketing impacts on car use

6.10.1 Increases in public transport patronage

All three case studies reported increased public transport patronage. The main results are summarised in table 6.6, along with results from other areas.

Table 6.6: Effect of marketing and information improvements on public transport patronage

| | |
|------------|---|
| SYLTE TOPS | <p>Follow-up monitoring of 750 people who had received personalised journey planners suggested the initiative had delivered significant increases in public transport use, as follows:</p> <ul style="list-style-type: none"> • 18% increase in bus use (the frequency of using this mode) • 10% increase in train use • 12% increase in tram use. <p>At Meadowhall, TOPS led to a 19% shift from car to bus amongst 250 management staff.</p> <p>One bus service which was promoted to companies along the route saw a 23% increase in patronage and subsequently had its frequency increased.</p> <p>New services such as the Manvers shuttle have generated 4000 entirely new public trips per week, mainly to call centres (which have ample car parking).</p> <p>(It should be noted that these changes are taking place in the context of a much bigger picture. Bus use across the whole of South Yorkshire is declining, although there is some evidence that the rate of decline is slowing).</p> |
| Nottingham | <p>Re-branding, marketing and better information have reversed a previous long-term decline in bus use. Previously, bus patronage was declining about 1% a year. Now passenger journeys are increasing at about 1.8% a year, or 1.3 million journeys per year. If re-branding and other initiatives had not taken place, we infer that public transport use would have continued to decline by about 1%, or 0.7 million trips per year. Thus, one year after the intervention, the local authority and bus company actions were responsible for about an extra 2 million trips.</p> |
| Brighton | <p>Bus passenger journeys increased by 45% between 1993 and 2002. Growth has been in fits and starts: for example patronage increased by almost 9% in 1999, but was static the previous year. The average growth is about 5% per year. In the year to June 2003, patronage increased by 4.6%, or 1.45 million bus passenger trips.</p> |

| | |
|-----------------|--|
| Perth, Scotland | A package of service improvements coupled with direct marketing delivered passenger growth of 63% over three years, roughly double the average increase for a conventional quality bus partnership. The people 'converted' to public transport were all ABC1s – that is, people who might be expected to be difficult to convert. |
| Buckinghamshire | Service improvements on one bus route (Red Route 9) delivered no significant increase in use. These were followed by a marketing campaign, which increased patronage by 28% within two months, and 42% after 10 months. |
| Bristol | Public transport improvements in a bus 'Showcase' corridor led to an increase in public transport mode share from 9% to 11% among a control group of people who did not receive targeted marketing, mostly due to a shift away from walking and travel as a car passenger. Among a separate group which received targeted marketing materials as part of an individualised marketing campaign, there was double the shift to public transport, from 9% mode share to 13%. Car driver mode share in the control group rose from 45% to 46%, whereas it fell in the target group, from 45% to 43%. |
| Cambridge | Simplification of the city's bus network, better information materials and simpler ticketing delivered a patronage increase of 25% over a four-month period. |
| London | Bus patronage increased by 31% over four years, with half the additional travel made by people who previously did not use buses at all. Although 'hard' measures played an important role, 'soft' measures, particularly the introduction of a simple flat fare, are also felt to have been important. |

The experience summarised in table 6.6 points to the following conclusions:

- Where a bus service is improved or is of reasonable quality, it is possible to achieve substantial increases in patronage over only a few months through targeted marketing, re-branding, better information materials and simpler ticketing products. Evidence from Perth and Buckinghamshire suggests the patronage increases resulting from marketing-led schemes may be substantially higher than those observed with conventional quality bus partnerships: for example 40-60% on targeted routes.
- Targeted marketing may be particularly effective in attracting former car drivers, whereas general increases in public transport quality that are not accompanied by marketing may mainly influence existing public transport users, or replace journeys previously made on foot or as a car passenger. For example, TOPS personalised journey planning in South Yorkshire achieved a 19% shift from car to bus amongst staff at Meadowhall; the marketing campaign in Perth was particularly effective amongst ABC1s, who are more likely to already have access to a car; and individualised marketing along the bus Showcase corridor in Bristol led to reduced car driver mode share, which was not achieved by the Showcase improvements on their own.
- Marketing and information may increase public transport patronage even in circumstances where it has been declining, as in Nottingham.

- Attention to soft marketing and information interventions may help achieve sustained patronage growth over periods of a decade or (possibly) more, as demonstrated in Brighton.

For most of the interventions we examined, soft marketing and information initiatives were accompanied by hard public transport improvements such as new services, increased frequencies, bus shelter improvements and bus priority schemes, or other measures likely to favour public transport, such as parking restraint. It is difficult to assess what proportion of new passenger trips may be directly attributed to the soft interventions. However, the Brighton and Hove Buses interviewee suggested that good promotion and marketing of a package of service improvements is at least as important as the improvements themselves: that is, promotion could account for as much as 50% of the resulting patronage increase. Although, in practice, promotional and marketing activity is indivisible from service improvements, this implies that as much as half the annual increase in bus patronage in Brighton, or 726,000 passenger trips per year, could be attributed to soft factors.

This conclusion is consistent with experience in Bristol, Perth and Buckinghamshire. In Bristol, hard service improvements on their own delivered a 2%-point increase in public transport mode share, whereas hard improvements coupled with individualised marketing delivered a 4%-point increase. In Perth, the increase in public transport patronage achieved by hard improvements and a marketing campaign was roughly double what might be expected from an average quality bus partnership. In Buckinghamshire, the contribution of the soft marketing campaign appears to have been even more significant. There, hard improvements two years earlier had failed to increase bus patronage, while the marketing campaign has increased bus use by 42% in under a year.

6.10.2 Modal shift from car to bus travel

The case studies provided relatively little information on what proportion of any increase in public transport patronage might be attributed to journeys that were previously made by car. The available evidence was as follows:

- In Brighton, no data on modal shift was collected, but the bus company believed about 10% of the increase in bus patronage was due to mode shift from the car. The city council put the figure much higher at 50%. Traffic leaving and entering Brighton city centre fell (by 12%) between 2000 and 2003. This is consistent with some of the increase in bus patronage coming from former or 'would be' car drivers.
- In Bristol, mode share data suggests that roughly half the increase in bus mode share may have come from trips previously made as a car driver.

There was some data from public transport initiatives aimed at leisure journeys, indicating alternative travel options for customers, as follows:

- In a survey of the Breeze up to the Downs initiative, 36% of passengers said that they would have come by car if the bus had not been an option.
- In the Moorsbus survey, about a third of passengers said that they had access to a car on the day of their journey.

Alongside this should be set the results from the literature reported in section 6.5, which indicate that about a third of new public transport trips generated by a conventional quality partnership may replace car trips.

As discussed in section 6.10.1, there is some evidence that public transport enhancements may be more effective at attracting former car drivers if they include a substantial marketing element, (though clearly this will depend upon how the marketing is targeted.)

6.10.3 Types of journeys affected

In Brighton, the city council interviewee felt that the greatest growth in bus use was occurring in the middle of the day, although there has also been considerable success in attracting users for new express commuter bus services. The introduction of the flat fare has encouraged longer journeys, whilst the all day saver ticket has meant that people are making more optional journeys by bus (including, presumably, relatively short trips).

In Nottingham, the greatest growth in bus use has been during the peak period, but most routes are also busy throughout the day.

TOPS has mainly focused on commuting trips, given its remit. However, it has included considerable work with hospitals and call centres, where many employees work shifts and weekends, and therefore travel at off-peak times.

In general, therefore, it seems that public transport information and marketing can potentially affect all types of trips.

6.11 Other effects of public transport information and marketing

The following additional benefits of public transport information and marketing were identified by case study interviewees:

- **Reduced social exclusion**

Marketing of public transport services can reduce social exclusion, by increasing awareness of what services are available amongst people who are on low incomes, elderly or otherwise potentially socially excluded. TOPS has a specific remit to aid with regeneration, and has developed products for school leavers, job seekers, the mobility impaired, single parents, asylum seekers and the probation service. One of its targets between 2002 and 2004 has been to achieve a 5% reduction in those seeking employment citing lack of transport as a barrier to accessing work. In Brighton, the interviewee also commented on the potential social inclusion benefits of information and marketing work, highlighting the elderly as one group who might not be fully informed or aware of their options. In Nottingham, the council is about to embark on specific initiatives aimed at job seekers, and at improving information for accessing hospital trusts.

- **Improved relationships between bus companies and the business community**
Innovative promotional work improves relationships between bus companies and the business community, which in turn gives the bus company greater influence in local economic partnerships and business forums. For example, the bus company interviewee in Brighton commented: 'being seen to invest means that your voice will be respected and listened to'.
- **Improved retail vitality**
Public transport improvements and associated marketing are perceived to have contributed to retail vitality in Nottingham.
- **Increased revenue for operators**
Successful marketing generates increased revenue for the public transport operator.

6.12 Synergies between public transport information and marketing and other policies

The case study interviewees identified various examples of synergy between public transport information and marketing and other policies.

First, there is clearly strong synergy between marketing and public transport service improvements. This works in two ways. In Nottingham and Brighton, interviewees saw information and marketing as crucial to increasing the impact of new or better services. In South Yorkshire, the interviewee felt that TOPS has helped identify areas with unmet demand for public transport, leading to some new services being developed.

Parking enforcement, on-street parking charges and parking charges implemented through workplace travel plans were perceived as tipping the balance in favour of public transport in Brighton and South Yorkshire. There was also a feeling in South Yorkshire that TOPS had smoothed the path for implementation of residents' parking schemes around Sheffield University and Royal Hallamshire hospital.

Public transport information and marketing initiatives are often complementary with a wide range of other soft measures. In Nottingham, the bus company felt that the city council's workplace travel planning (and especially its Commuter Planners Club) was complementary to the bus company's own initiatives to promote bus services to commuters. In Buckinghamshire, providing organisations with public transport information (and persuading them to display it) is seen as a good way of starting a dialogue about workplace travel planning with an organisation without scaring them off. In SYPTE, TOPS is already clearly integrated with workplace travel planning, as described earlier.

Public transport information and marketing has formed an important element of some secondary school travel plans. For example, in early work at Sandringham School in Hertfordshire to encourage modal shift from car to bus, timetables were branded in an 'X-files' style, to capitalise on association with the popular TV series, using the slogan 'S-files: the truth about travel to Sandringham school', (Davies and Gardner 2000). Interviewees in Nottingham and South Yorkshire both mentioned potential

benefits from working with schools. For example, TOPS was involved in a pilot project with Willowgarth School in Barnsley, where children undertaking Trident work experience were encouraged to use the bus, via provision of personalised journey planners and discounted tickets.

As discussed in Chapter 5, personalised travel planning initiatives either rely on good quality public transport information or stimulate its production, and TOPS already makes considerable use of personalised travel planning techniques.

Public transport information and marketing is also associated with travel awareness work. More information about Nottingham's city wide Big Wheel campaign is reported in Chapter 7, whilst in South Yorkshire, Travelwise was mentioned as generating a useful forum and network for discussing issues relating to public transport information and marketing. Chapter 7 also reports on a travel awareness experiment in Denmark (called 'BikeBus'ters) which involved joint promotion of cycling and public transport.

Car clubs often involve arrangements for members with public transport service providers, and encouraging people to perceive public transport services as good quality often plays an important role in persuading them to forego personal car ownership. Indeed, improving perceptions about public transport is an important element of any initiative which is potentially encouraging people to adopt a less car dependent lifestyle.

Finally, the bus company in Brighton pointed to the positive effect of city centre regeneration policies which had boosted bus travel into the centre. Conversely, TOPS has a specific remit to contribute to regeneration objectives.

6.13 Relationship between spending and impact for public transport information and marketing

The evidence provided for Brighton and Nottingham enabled some assessment of the relationship between spending on public transport information and marketing, and the impact on car use. In calculating this relationship, we have assumed that:

- Around half the increase in public transport patronage in Brighton and Nottingham is the result of promotion and marketing, with the remainder due to physical service improvements. This is inevitably a judgement (rather than a clear conclusion from research evidence). It is derived from an estimate made by the Brighton and Hove Buses interviewee, supported by evidence from Perth, Bristol and Buckinghamshire.
- Around 30% of new bus trips would otherwise have been made by car (and in line with average car occupancy levels, we assume 19% would formerly have been car driver trips and 11% car passenger trips).
- We assume an average car trip length of 13.9 kilometres to convert from car driver trips to car driver mileage (based on National Travel Survey data on the average length of car driver trips).
- In Nottingham, we take account of the change from long term decline in bus use prior to 2000 (about 1% a year) to year-on-year increases of about 1.8%, and infer

the local authority and bus company interventions are responsible for an increase in passenger journeys of about 2.8% in one year, or 2 million passenger journeys.

- We assume the behaviour change in the current year will be partly sustained in future years, decaying by 40% per year.
- We assume that investment in marketing and promotion by the bus company at least pays for itself in increased ticket revenue, which presumably provides their justification for spending it. Money spent by the bus company is therefore not taken into account in calculating net costs. (As discussed below, information from SYPTE provides some further evidence in support of this general assumption).
- The cost of achieving the increased patronage in the current year is taken as the total of revenue and capital in the current year only, with capital costs annualised at 3.5%. No account is taken of spending in previous years.

We were unable to draw any general conclusions about the cost-impact ratio of the TOPS service in South Yorkshire, as there has so far been only limited monitoring. However, there is evidence that TOPS almost pays for itself in terms of additional revenue generated from ticket sales. The SYPTE interviewee said that season ticket sales of at least £150,000 per annum could be directly attributed to TOPS. This is a conservative estimate, as it only includes sales through organisations that are agents or are receiving special discounts. It does not include tickets purchased independently by people who have received information from TOPS. Given that the overall cost of TOPS is some £176,000 per year, this means that the maximum net annual cost of the initiative is just £26,000, and, in reality, it is probably considerably less. Meanwhile, via this funding, TOPS has undertaken work with 225 organisations, including production of between 550 and 800 personalised journey plans per year.

Table 6.7 summarises our calculations of cost-impact ratios for marketing and promotion of city-wide services in Brighton and Nottingham.

These calculations suggest that the public sector costs for marketing of city-wide bus services are about 2 pence per car kilometre saved. As discussed earlier, this takes no account of bus company investment, on the assumption that this investment at least pays for itself in terms of increased ticket sales. In reality, it may more than pay for itself, generating additional revenue for the operating company, which could be balanced against the public sector investment to reduce the overall cost per car kilometre saved. Even without this effect, it appears that once a public transport service exists, additional money spent upon its promotion represents excellent value per car kilometre reduced.

Table 6.7: Calculation of cost-impact ratios for public transport information and marketing

| | Brighton | Nottingham |
|--|--------------|--------------|
| Annual increase in bus passenger trips | 1.45 million | 2.0 million |
| Increase in bus passenger trips in current year attributed to soft factors | 0.73 million | 1.0 million |
| Reduction in car driver trips in current year* | 139,000 | 190,000 |
| Reduction in car driver distance in current year (km)~ | 1.93 million | 2.64 million |
| Total car driver distance transferred to bus (kilometres)# | 3.87 million | 5.28 million |
| Local authority revenue spend in current year^ | £60,000 | £85,000 |
| Local authority capital spend in current year^ | Not relevant | £220,000 |
| Total local authority spend in most recent year, with capital costs annualised + | £60,000 | £92,700 |
| Cost per car kilometre saved (pence)** | 1.6 | 1.8 |

* Reduction in car driver trips in current year = 0.19 x (increase in bus passenger trips in current year attributed to soft factors)

~ Reduction in car driver distance in current year = (reduction in car driver trips in current year) x (average mileage of a car trip). Average mileage of a car trip is 13.9 km (derived from NTS 1999/01)

Total car driver distance transferred to bus is calculated by assuming that a proportion of new bus passengers in the current year will continue to use the bus in future years, with a decay rate of 40% per year.

+ Capital costs are annualised at 3.5%.

^ Costs are taken from table 6.3.

6.14 Future impact of public transport information and marketing

Interviewees in Nottingham and Brighton felt that it would be possible to sustain current levels of public transport patronage growth, although in Brighton there was an awareness that sooner or later the existing market might be saturated, and further growth would depend on aiming at new markets. They identified commuter travel as one such market. Interviewees also felt that higher growth rates would be difficult to achieve, and that increasing current spending on marketing and information would not necessarily be the top priority to generate the desired growth. Current levels of spending in these areas were felt to be about right.

The one exception to this was that interviewees in both cities felt that real-time information (at roadside information points, on the web, and to support electronic personalised journey planning) would be an important tool to help penetrate new markets. One of the Brighton interviewees commented that the next group they aim to target is 'wedded to the internet' and not the sort of people who would pick up a copy of Bus Times.

The main constraints on further public transport growth were felt to be congestion on the existing road network (which could be tackled through better enforcement of bus lanes, and congestion charging); gaps in the public transport network (which require investment in extra services); and difficulties with staff recruitment due to poor pay and conditions.

Although the Brighton and Nottingham interviewees all felt that their current spending on information and marketing was about right, the bus company interviewee in Brighton commented that elsewhere in the country some bus companies are spending very little on marketing, and that they had the potential to achieve a significant increase in patronage through investing in this field.

The Brighton interviewee also felt that it would be possible to make a substantially greater difference using very intensive, personal and individualised marketing, but that this would involve highly unrealistic levels of budgeting and staffing. Interestingly, in this 'fantasy' scenario, he felt that there would still be a subsection of society who would not be interested in public transport, but this would only be about 10-20% of the total population.

In South Yorkshire, the TOPS scheme was expected to remain at about the same level of staffing and resources, although there was some uncertainty about this because of the withdrawal of DfT bursary funding coupled with internal budgetary pressures. If resources were not a constraint, the interviewee judged that the main limit on future impact would be the level of interest from client organisations. Small and medium organisations were felt to be difficult to reach. However, if additional resources could be dedicated to working with specific target sectors (such as hospitals, universities and job centres), it was felt that a doubling of resources would enable TOPS to easily more than double ticket sales, but that increasing staffing and budgets above this level would not be worthwhile. In other words, the interviewee felt that there is the potential for TOPS to achieve rather more than double its current impact. In the short term, one TOPS target is to increase by the number of client organisations using any of the products on offer by 20 per year.

6.15 Key issues for scaling up public transport information and marketing

Most of the obstacles to increasing public transport patronage in future were felt to relate to difficulties providing a good service that was worth marketing, rather than to the marketing and information process itself.

- **Staff recruitment and retention**

Bus company interviewees in Nottingham and Brighton both mentioned their difficulties recruiting and retaining drivers. One commented that the shortage of drivers is related partly to the low status of the job, and also to the fact that people can obtain comparable wages in jobs where they are less exposed to the perceived dangers and anti-social behaviour encountered by bus drivers.

- **Revenue support for public transport services**

One of the Brighton interviewees commented that 'the best way to promote public transport is for there to be more of it'. Local authorities' revenue budgets for supporting bus services were felt to be inadequate.

- **Tackling congestion**

Bus operators said that local authorities had to be prepared to take tough action in installing bus priority at pinch points. Powers for more effective bus lane enforcement

were needed. Nationally, interviewees felt stronger government support for congestion charging would be helpful.

- **Better co-ordination**

The SYPTE interviewee said that the PTE's lack of control over bus operators' was a difficulty, as frequent timetable and service changes made information provision problematic. He felt legislative change was needed to enable the provision of 'sensible' ticketing arrangements. In South Yorkshire, the lack of a zonal ticketing system was also seen as an obstacle to marketing efforts.

- **Relative cost of motoring and public transport**

The Brighton interviewee suggested that there were problems with public misperceptions about the relative cost of travel by car and public transport. Real-terms increases in fares in recent years, coupled with the fall in the real cost of motoring, had made this even more of a problem, and the interviewee thought that government action was necessary to address the growing disparity.

- **Lack of incentive for employers to become involved**

The Brighton interviewee suggested that tax changes to encourage local employers to take more responsibility to promote transport efficiency would be helpful. In South Yorkshire, the interviewee commented that it was frustrating that the planning process tended to concentrate on the development of travel plans, with little monitoring of outcomes, or enforcement of implementation.

6.16 Policy implications relating to public transport information and marketing

- Increased revenue support for bus services is likely to be a necessary condition for the growth in bus patronage, both to meet the rising cost of attracting enough staff, and to enable provision of more, and more frequent, services.
- If traffic congestion increases, it will be difficult to deliver better bus reliability. Local action (re-allocating road capacity, and restraining parking) and national action (in support of congestion charging and other restraint mechanisms, including fuel duty) could therefore be important if the potential increase in bus patronage is to be achieved.
- The lack of directive powers for local authorities and PTEs to set the framework for the services to be provided by public transport operators (for example, defining a zonal ticketing system) can be an obstacle to the creation of good public transport services, and associated information and marketing activities.
- OFT constraints are sometimes perceived to inhibit cooperative arrangements on joint information, ticketing and timetabling arrangements between operators. National clarification that this is encouraged could be helpful.
- Notwithstanding the constraints on providing a public transport network that is worth marketing, there are likely to be many places where better promotion could lead to patronage growth on existing services.

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