



## Marketing Recommendations

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Marketing programs can be one of the most overlooked components of providing transit services. The marketing of any service is dependent upon providing a quality product or service. Once CATS determines a final service plan to provide expanded transit services, a marketing campaign must be established to inform community residents and existing patrons of system changes. This section details developing a sound system identity as well as recommends a marketing and promotion program for CATS.

### TRANSIT IDENTITY REVIEW

The perceptions of the public are difficult to identify as these perceptions are made up of individuals' thoughts. The types of people hired, their appearance, the condition and design of the buildings and equipment, the type of media received, and other factors all contribute to public perception. As the transit agency makes changes and improvements, people will change their preconceived notions. The following section briefly reviews the identity of CATS.

#### Logo

The logo should portray, identify, and define a transit agency and strongly promote its image in advertising. The logo identifies agency vehicles, equipment, shelters, and facilities, as well as maps, schedules, and other agency materials. The logo design should follow a simple set of design guidelines. The most important aspect for success of a public image program is its implementation. Standards should be set for application and use. Defining the standards should include shape, size, proportion, color, and materials. Consistency of logo use reinforces the transit system's identity. Basic guidelines include:

- Logo should be unique.
- Logo should be simple, geometric, understood by all, and have a strong visual impact.

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- Logo should communicate in all two-dimensional and three-dimensional applications (e.g., letterhead, uniforms, bus wraps, shelters, schedules, etc.). Avoid extremely decorative forms.
- Logo should reproduce well in black and white as well as color.
- A copyright check and filing should be made on any adopted logo.

While the current logo may serve Community Alliance of Human Services well, it has some limitations as a transit logo, including the following:

- While it is painted on transit vehicles, it is very small and hard to see.
- It does not convey a strong message of transit or transportation.
- The logo is limited to black and white replication.
- The logo is not strictly a transit logo, but a Community Alliance logo.
- The logo gives no geographical reference—it could be from anywhere.



It is recommended that either a new logo or an enhancement to the existing logo be designed and incorporated into the overall CATS identity. The existing logo could be enhanced to convey the message of transit and transportation more strongly.

Figure VII-1 provides various logos that could be used.

Figure VII-1



## **Vehicles**

CATS vehicles are suited for the type of service which is provided in the region. The vehicles are a mix of trolley and body-on-chassis. The vehicles are kept clean and well maintained with a simple design. The vehicles have a small logo and are not well defined as vehicles for general public transit. The vehicles currently are white with maroon striping. The lettering distinguishes the vehicles as *Community Transportation Services*, however, with a push to change the identity to *Community Alliance Transportation Services*, vehicles will require new lettering and possibly a change to the paint scheme.



This is key to creating a strong, positive image of the transit system. Several key points to mention about CATS vehicles are:

- Vehicles are maintained and cleaned on a regular basis by drivers.
- The logo is painted on vehicles along with the CATS phone number.
- No real system brand is painted on the front of the vehicles.

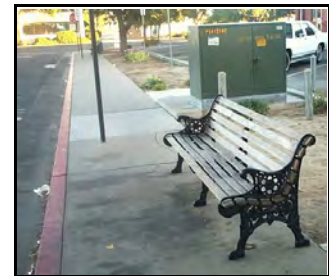
## Signage

Unlike many fixed-route systems with bus stop signs at intersections and major transit destinations, CATS has limited transit signage. CATS should consider bus stop signage at all stops and time points.



## Passenger Amenities and Facilities

Again, unlike many larger systems, passenger amenities such as shelters and benches do not exist. Many of the existing passenger waiting areas (shelters) are located in existing buildings such as the waiting areas in the hospital and local store lobbies, which serve as the major passenger waiting areas. However, CATS should continue to coordinate with major transit-generating agencies/businesses, such as Wal-Mart, to improve passenger waiting areas at these locations and to determine if improved passenger amenities are needed at key locations. Examples of simple bus benches that could be used in the area are presented below.



## Passenger Information

The public information area of marketing is important because this is the arena that tells people what the system is and how to use it. Some possibilities for presentation include prepared user information aids, media coverage, community meetings, a citizens' advisory committee, school program, interior bus cards, telephone information service, discount passes, free-ride coupons, system destination maps, and information bulletins.

### Existing Brochure

One example of public information is a passenger information brochure or rider guide. The brochure can be one of the most informative pieces produced by the transit agency. It provides the opportunity to show people what service is avail-

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able, how easy it is to use the bus, and other agency information. There are several key points of discussion relating to the current brochure:

- Fare information is hard to read.
- Schedules need to be revised to be more readable and consistent.
- The brochure does not explain how to use the service. Most new riders would rather know how to use the service, where it serves, how much it cost—the “why would I want to use it” kind of information provided in a true informational piece. Route-deviation service needs to be identified along with how to use it and service area.
- Potentially, a map of services should be provided.
- Potentially, separate brochures by route are needed.
- Much of the information could be condensed and replaced with more useful information or promotion.
- Alternate formats for the visually impaired.

### Existing Promotional Items

Very little exists in terms of promotional items. Promotion can be very costly and it is difficult to measure effectiveness. Efforts to develop promotional materials should be evaluated carefully by CATS. Promotional materials that could possibly be used by CATS include the following:

- Paper or plastic shopping bags for patrons with the CATS logo and contact information printed on the bags.
- Gift certificates to local restaurants which riders may frequent.
- Transit buttons, where during certain random days if the patron wears the button, they ride for free.
- Pencils or pens with CATS information printed on them, which are provided to organizations and agencies.
- Baseball caps that can be handed out at county fairs or other informational meetings.
- Items that are geared toward existing businesses.

### Existing Advertisement

Advertisements can be one of the strongest marketing tools available, whether it is radio, television, or newspaper media. CATS should advertise in local papers using both paid advertisements and public service announcements, which in most cases, are free. In some instances, CATS can receive discounts for advertising space and should take full advantage of this courtesy by local businesses. This

type of partnership with local businesses should continue to be fostered with strong working relationships. Many times, transit agencies do not have strong partnerships with local businesses and agencies.

Advertisements present an excellent way to communicate information, including system changes, special promotions, contact information, and information on how to use the system.

Advertising can be very costly. For example, a one-quarter-page ad can run from \$100 to nearly \$500 for between four to five issues of a paper or publication. Typically these are black and white ads with color adding considerably more to the cost. Several ads per year in numerous publications can quickly expend the marketing budget for an entire year if agencies are not diligent. However, many times newspaper ads represent the best source of getting the word out to the public about local services.

## **Website**

Currently, a transit website for information about CATS services provides the basic information along with schedules. The website should be redesigned with much more information provided, such as the following:

- Key destinations served
- Maps of services
- Easy-to-read schedules
- Fare information
- Information on how to use the service
- Key contact information
- Information on how to schedule a dial-a-ride trip
- Rider policies
- Mission statement
- Information formats for those with visual impairments

## **Telephone Information**

The greatest source of information for CATS is through telephone conversations with staff at the agency. Staff are knowledgeable and



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pleasant to talk to about available transit services. Transit information can be obtained by calling the local office during normal business hours. However, as more services are coordinated, particularly with the Red Cross and other agencies, CATS should function as a regional dispatch center, where all calls are answered and then routed to the appropriate agency. Ideally, this should be a toll-free number.

### **Outreach Efforts**

Limited outreach efforts have been initiated by CATS, largely due to the fact that time, staffing, and financial resources available for outreach efforts are limited. Outreach efforts exist in the form of interaction between drivers and patrons, however there is no formal outreach or public education program for patrons. Outreach efforts should be geared toward both existing patrons and new markets, such as students and employment transportation opportunities. CATS will perform agency education on request to organizations, however this should be expanded. The outreach program should be a formally adopted program within the context of the overall marketing program which is present at key events and is pursued regularly by staff. Education booths or programs should be present during events such as business fairs, senior sponsored luncheons, local schools, etc. It is recommended that CATS purchase a portable booth that can be taken easily to these events and be constructed so that it is highly visible.

## **TRANSIT MARKETING PLAN AND STRATEGIES**

As with many rural transit agencies across the United States, CATS currently does not have a strategic marketing plan in place. Many factors can affect the success of marketing efforts, primarily the resources available to accomplish the objectives and strategies appropriate for a system of this size. To reiterate, the strongest marketing which can be done is to offer efficient and convenient transit service. The next logical step is to develop strategies which can realistically be accomplished with limited staff and financial resources. One such strategy is the design of new brochures to be distributed to patrons and placed at key locations within the communities to attract new ridership. A brochure must convey the message that CATS is an **reliable alternative** and can be used by anyone in the area. This brochure should be designed around the precept of attracting new ridership who

may not know the benefits of transit. Additionally, several proposed CATS logos have been provided for review and discussion.

The Transit Marketing Plan and corresponding strategies are presented in this chapter. This includes the final three steps needed for developing a marketing plan:

- Developing the Preliminary Plan
- Calculating the Marketing Budget
- Establishing Evaluation Criteria for Marketing Efforts

This section presents the CATS Marketing Budget, provides an implementation time line for specific strategies, and provides a tool for measuring the effectiveness of the marketing efforts.

## **CATS MARKETING PLAN**

The following section describes recommendations for increasing public awareness, attracting new ridership, creating a new image of transit in the area, and increasing the visibility and use of CATS overall.

### **Increase Public Awareness and Visibility**

CATS should increase public awareness and visibility by creating an attractive image of transit. This **branding** may be accomplished by the following:

- Design of a transit logo tailored to CATS.
- Repaint buses with an attractive paint scheme or, alternatively, wrap the buses with a simple bus wrap.
- Create simple bus stop signs that are attractive and easy to see.
- Redesign of an attractive rider brochure with key elements of service characteristics provided in an easy-to-read document.
- Design attractive bus passes.
- Attend local events such as festivals or fairs with an informational booth set up to provide service information or showcase the buses.
- Educate local agencies to refer clients to CATS for their transportation needs.

## **Promote Service to Users**

This concept has been detailed throughout this report with several examples of promotion presented in previous chapters. Promotion for CATS should be tailored to the following:

- Establish an educational program that includes a simple one-page information sheet.
- Establish relationships with local business to educate employers and employees on the use of the system.
- Hold a training workshop for local social service agencies.
- Provide user incentives such as discount passes, free days, donation of canned food for charities, etc.
- Advertise in the local paper, highlighting employees' or patrons' stories.
- Allow local retailers/businesses to sell transit passes.
- Promote a special shopping tour for seniors/elderly/disabled which includes numerous businesses and retailers.
- Provide local businesses with information brochures they can post at their place of business, including local restaurants.
- Work with local businesses to allow them to advertise on the buses, thereby generating revenue and creating business partnerships.
- Increase the use of the Internet for advertising and information dissemination.
- An outreach program to groups and agencies where these groups are visited regularly to keep them abreast of the transit system and/or changes.



## **One-Year Marketing Plan**

A one-year marketing plan is a list of projects that should be completed throughout the following fiscal year. Table VII-1 presents the One-Year Marketing Plan for CATS. This plan gives monthly steps for completion by the marketing team for an entire year. This should be used as a guide for future planning. While it may not be possible or feasible to complete all the activities listed, this should be a framework for programmed initiatives and be followed as closely as possible.

**Table VII-1  
One-Year Marketing Plan**

<b>Month One</b>			<b>Activities</b>
<b>S T E P S</b>	1	Establish a Marketing Planning Team.	
	2	Distribute new brochures at key locations.	
	3	Visit local schools and set up a special student pass system on a trial basis.	
	4	Plan to attend an upcoming local event (1 to 3 months away).	
	5	Investigate if local business or government agencies would be interested in advertising with CATS using bus wraps, flyers posted in the buses, or at new bus stops.	
<b>Month Two</b>			<b>Activities</b>
<b>S T E P S</b>	1	Identify and begin planning for an upcoming community event.	
	2	Investigate advertising costs on local radio station.	
	3	Identify those businesses and agencies that are interested in advertising with CATS.	
	4	Develop a promotional kit for bus pass programs.	
<b>Month Three</b>			<b>Activities</b>
<b>S T E P S</b>	1	Attend a local community event with handouts, free daily passes, etc.	
	2	Advertise on a local radio station.	
	3	Hold a "Shopping Day" offering a communitywide shopping trip for senior citizens free of charge or for a minimal flat fee.	
	4	Hold a "Free Ride Day" offering a one-way free ride on a CATS bus.	
<b>Month Four</b>			<b>Activities</b>
<b>S T E P S</b>	1	Publish advertising flyer in local newspaper(s).	
	2	Contact two employers or agencies regarding a bus pass program.	
	3	Visit with local business/retailer to educate employees/employers on the transit system.	
<b>Month Five</b>			<b>Activities</b>
<b>S T E P S</b>	1	Visit local agencies and senior centers to discuss joint ventures to include promotional days and possible joint sponsorship of area trips.	
	2	Make additional contacts, if necessary, for exterior/interior bus advertising.	
	3	Hold a "Bus Riding Training Day" following a Seniors' Luncheon.	
<b>Month Six</b>			<b>Activities</b>
<b>S T E P S</b>	1	Hold Marketing Planning Team six-month meeting.	
	2	Evaluate current marketing strategies to be sure CATS is "on-target" and accomplishing marketing goals.	
	3	Contact two employers or agencies regarding a bus pass program.	
	4	Establish the following year's marketing budget.	

**Table VII-1, continued**  
**One-Year Marketing Plan**

<b>Month Seven</b>		<b>Activities</b>
<b>S T E P S</b>	1	Advertise on a local radio station.
	2	Visit with local schools to plan additional events.
	3	Plan "Sterling Shoppers Week," a week of discounted fares for those doing holiday shopping.
<b>Month Eight</b>		<b>Activities</b>
<b>S T E P S</b>	1	Update the website with transit information.
	2	Contact two employers or agencies regarding a bus pass program.
<b>Month Nine</b>		<b>Activities</b>
<b>S T E P S</b>	1	Start "Thrifty Thursday" with fares lowered to 25 cents for that month's Thursdays.
	2	Produce a "Transit Rider's Guide" for children and seniors.
	3	Quarterly Marketing Team Meeting.
<b>Month Ten</b>		<b>Activities</b>
<b>S T E P S</b>	1	Distribute "Transit Rider Guide" to local schools and senior centers.
	2	Contact two employers or agencies regarding a bus pass program.
	3	Evaluate the success of senior and children's programs in the form of surveys and boarding counts to determine if these market segments have increased over past years' ridership levels.
<b>Month Eleven</b>		<b>Activities</b>
<b>S T E P S</b>	1	Hold a children's art contest where children can compete for small prizes for designing a transit-related picture or painting. Coordinate with schools to promote the program.
	2	Hang children's art in buses behind plexiglass for public viewing.
<b>Month Twelve</b>		<b>Activities</b>
<b>S T E P S</b>	1	Hold Marketing Planning Team year-end meeting.
	2	Evaluate overall marketing successes and failures for future marketing plans.

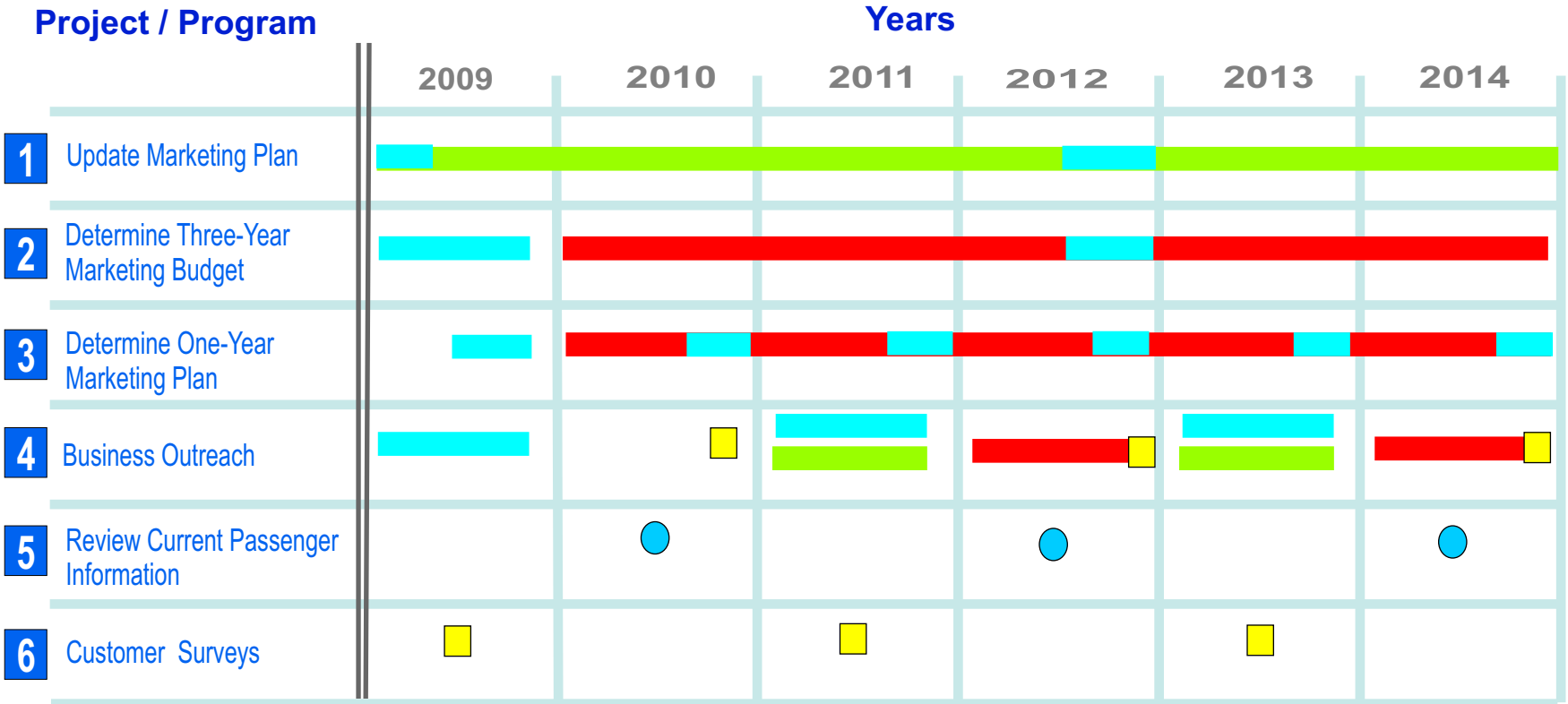
### Short-Term Vision

Figure VII-2 presents the Short-Term Marketing Vision. This is a general outline of steps to be taken and should be used as a guide. This guide presents six steps comprising the marketing vision:

- An Update to the Marketing Plan
- Determining the Three-Year Marketing Budget
- Determining the One-Year Marketing Plan
- A Business Outreach Component
- A Review of Passenger Information
- Customer Surveys

Each project or program is envisioned each year as being in a planning phase, implementation phase, or monitoring/evaluation phase. Several programs are envisioned as being short review or periods to receive feedback on programs and services.

# Figure VII-2 Short-Term Marketing Vision



- LEGEND**
- Feed Back
  - Review
  - Planning Phase
  - Implementation Phase
  - Monitor/Evaluate

### Update Current Marketing Plan

This program involves inventorying current marketing strategies and evaluating whether or not they are being effective. An update requires taking a comprehensive look at the marketing program, financial awareness for future programs, target markets, and future markets. An update does not have to be a costly part of the overall vision. Typically, staff can review this information every year with full marketing updates every three to five years by outside sources.

### Determine Three-Year Marketing Budget

The three-year marketing budget should coincide with updating the marketing plan. The budget should be a rough estimate of future expenditures and revenues through the marketing program. A budget will ultimately determine the intensity of the one-year marketing plan.

### Business Outreach

A Business Outreach program is included in the Marketing Vision as it represents an effective advertising tool as well as representing potential financial backing through local businesses and employers. An outreach program should be planned, implemented, and responsive to employer/employee feedback. This program can entail activities such as the following:

- Employer/employee and student surveys on service needs.
- Partnerships with local business/employees to help meet employment transit demand through various transportation alternatives (i.e., helping to arrange rideshare requests, additional employee-tailored transportation with financial backing from employers/business and/or employer/employee education efforts on the service).
- Outreach to local radio and/or newspapers for discounted advertisements.

These are just a few outreach ideas that CATS could choose to implement. An outreach program need only be a list of ideas that could potentially be implemented to form future partnerships within the communities. This should be incorporated into the one-year marketing plan, with activities such as meeting with a local business for advertising on the buses.

### Review Passenger Information

Reviewing passenger information regularly to make sure that brochures, flyers, and other passenger information are kept up-to-date and current is a vital part of a short-term marketing vision. Incorrect or outdated information which is provided to customers is a sure way to decrease ridership. Information should be concise, clear, and available if it is to be effective. Regular review of these promotional or informational materials will promote CATS as a reliable transit opportunity.

### Customer Surveys

Customer surveys should be done at least every three years. Customer surveys require that a survey be designed that asks the important questions which help to improve transit service. Questions should inquire into service delivery, destinations, income, reason for riding, and perceptions of areas such as driver friendliness, cleanliness of the buses, fare information, timeliness, etc. Surveys are an important measure of service performance. If you don't know the perceptions of the clientele you are serving, how can you effectively serve them? The way to measure these perceptions is to survey them.

### **Brochure**

A sample brochure for the current CATS service is included in Appendix G. This brochure should be printed in color if possible, and should be translated into Spanish once it is finalized. Alternate formats for the visually impaired should be prepared. It is anticipated that this brochure will change as service changes are implemented.

### **CATS Website**

Nearly 50 percent of US households have Internet access. Additionally, there are Internet resources at local libraries, the local schools, senior centers, and other public locations. This makes using this media form an attractive way to market and advertise a transportation system. Much of the information in this section is taken from *Transit Cooperative Research Program, Synthesis 43, Effective Use of Transit Websites*. In general this report finds that transit patrons are primarily interested in basic customer service information such as maps, schedules, fares,

and general service information. CATS should take this into consideration when designing their future website. Based on LSC's past experience with rural systems and website development, it was found that complicated pages, which take an overwhelming amount of time to load and refresh, drive customers away. Rural areas typically have slower Internet connection speeds and therefore it is recommended that the future site be simple in design with only essential information provided. The more complicated a website is to navigate, the more difficult it is for a user to obtain information.

However, there are some essential design elements which should be incorporated to make this site effective:

- Fares
- Schedules
- Maps
- Accessibility information
- Paratransit information
- Purchasing passes
- Public involvement information
- Contact information

Other features would be a place for patrons to e-mail comments to CATS and a visitor counter.

The main benefits of a website are making the schedule, maps, and passenger information readily available. Other benefits include attracting new customers, improving the agency's image in the community, increasing ridership among existing patrons, and providing information for public involvement.

Key to site navigability are:

- Put important information at the top of a page.
- Group related information.
- Give greatest visibility to the information most often requested, such as schedule, fare information, service area, and contact information.
- Don't make visitors search or dig for important information.

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- Place navigation elements on the left side of the screen, which could be repeated on every page to keep track of where they are on the site.
- Keep pages consistent in design, such as logo placement and contact information.
- Have the website reviewed by outside sources for ease of use. This could be in the form of a brief users' workshop at a local civic group meeting or seniors luncheon.

## PDF Files

While PDF files are great for some, others despise waiting for them to load, or don't even have a PDF viewer. Care should be taken when considering the use of PDF documents on the website. That is not to say they should not be used for specific items such as printable route maps or system information. However, alternate forms of the files should be done in something like HTML (text) format. That is to say, if a PDF file is to be used, there should be an alternate file format for those who are unable or unwilling to use the PDF formats.

## Schedules and Maps

Many times transit agencies try to "squeeze" large schedules onto their web page. This method does not make reading schedules online easy or pleasant. Schedules should be made accessible in PDF and HTML formats. In either case, a printable format should be designed so people can print schedules at their leisure. It is imperative that if schedules change, they be updated immediately on the website.

Maps on an agency's website are an excellent idea if done properly. Maps should be clearly labeled and easy to read. Maps should have the major streets labeled as well as stop locations. Many agencies use smart tags associated with stop locations. A patron can click on a stop and this is linked to information about that stop, including the schedule for that particular stop.

## Accessibility for Persons with Disabilities

A final note on website design is taking into consideration persons with visual disabilities. A number of simple steps can make a website accessible to persons with disabilities. These include the following:

- Providing a text equivalent of all graphical elements. For example, use of "ALT" (alternate) tags for graphical elements. Text alternatives make web pages accessible to screen readers, which are software programs

that convert text into synthesized speech for blind or visually-impaired persons.

- Designing web pages so that information conveyed with color is available without color.
- Not causing the screen to flicker with a frequency greater than 2 Hz and lower than 5 Hz, which can induce seizures.

Following the above guidelines for website design should make for an effective site to provide useful transit information to CATS patrons.

## **MARKETING BUDGET**

Currently, CATS has a limited marketing budget, however this budget does not specify products, services, or advertising which will be programmed over the next fiscal year. The marketing budget is a tough field for many transit agencies. According to the American Public Transit Association, transit providers typically budget between 0.75 and 3.0 percent of their gross budget on marketing promotions (excluding salaries). Although this is less than most private sector businesses, public sector organizations can rely more heavily on media support for their public relations programs.

In reality, transit agencies must ask themselves questions, such as, “Will we get more riders with this campaign?” or “Will we get additional revenues from this marketing effort?” or “Why should we advertise something we are losing money operating?” Answers to these questions are subjective and may be influenced politically or may be continual efforts toward a particular market segment. The following provides some “rules of thumb” that may be used.

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Marketing budget per peak vehicle	=	\$800 to \$1,200
Amount of line revenue generated for each marketing dollar spent	=	\$13 to \$16
Marketing budget per rider (excluding transfers)	=	\$0.015 to \$0.02
Amount per person in the service area	=	\$0.22 to \$0.25
3-5% of operating costs expended as follows:		

Salaries and/or Consultant Services	66%
Printing Materials	19%
Advertising	7%
Merchandising	4%
Other Direct Expenses	4%
<hr/>	
TOTAL	100%

### CATS Marketing Budget

A first-year annual budget of approximately \$15,000 is anticipated for marketing efforts to implement systemwide changes. This would include the cost of designing and printing brochures and website development. The subsequent years may anticipate a marketing cost of between \$10,000 and \$12,000.

The marketing budget of \$15,000 will use the above “rules of thumb” for the different marketing strategies, although adjustments have been made which are more closely tailored to CATS.

Salaries and/or Consultant Services	\$7,500
Website Development and Testing	\$2,500
Printing Materials	\$2,500
Advertising	\$1,500
Merchandising	\$500
<u>Other Expenses</u>	<u>\$500</u>
TOTAL Marketing	\$15,000

**Short-Term Budget**

This section presents the short-term (three-year) marketing budget. The short-term budget should act as a guide for prioritizing marketing projects for the CATS service. There is a total marketing budget of approximately \$38,000 for Fiscal Years 2009-12. Table VII-2 provides the three-year budget at an annual increase of five percent.

<b>Table VII-2 CATS Marketing Budget</b>			
<b>Marketing CATS Projects</b>	<b>3-Year Plan</b>		
	<b>2009/10</b>	<b>2010/11</b>	<b>2011/12</b>
Brochure Production/Printing	\$2,500	\$2,625	\$2,756
Flyer Production/Printing	\$1,500	\$750	\$788
Radio Advertising	\$1,000	\$750	\$788
Print Advertising	\$1,500	\$500	\$525
Merchandising	\$750	\$788	\$827
Website Design/Production	\$2,500	\$200	\$210
Special Promotions	\$1,000	\$1,050	\$1,103
Orientation Materials	\$500	\$500	\$525
Incentives	\$1,000	\$1,050	\$1,103
Direct Mailing	\$800	\$500	\$525
Pass Printing/Administration	\$1,200	\$1,260	\$1,323
Survey/Feedback	\$0	\$1,200	\$0
Direct Sales/Contact with Businesses	\$750	\$500	\$525
<b>TOTAL EXPENSES</b>	<b>\$15,000</b>	<b>\$11,673</b>	<b>\$10,996</b>
<i>Based upon 5% Annual Inflation Rate</i>			
<i>Source: LSC, 2008.</i>			