

1. Situation Assessment Worksheet

Assess Your System's Visibility and Visual Image

Ask yourself:

- What does your system look like to the public?
 - Are its name and logo recognizable?
 - Can you easily find information that tells you how to ride?
 - Is that information easy to understand?
 - Are bus stops clearly identified?
 - Are bus shelters clean and the trash emptied?
 - Is passenger information posted at the bus stops or shelters?
- Can you find a customer-service telephone number easily —
 - At the shelters?
 - At the bus stops?
 - On a website?
 - In the phonebook (yellow and white pages)?
 - If you call that number, are you able to reach a person?

Assess Your System's Passenger Experience

Ask your riders:

- Ride the bus and visit with other riders
 - Do they find the service meets their needs?
 - Is passenger information readily available?
 - Are service changes communicated clearly?
 - Are bus stops clearly marked?
 - Is service on time?
 - Are the fare structure and payment options easy to understand?
- How is the ride?
 - Is interaction with the bus operator pleasant?
 - Is the ride comfortable?
 - Is transferring difficult?
- What changes would improve the service?

- Recruit first-time-riders to try the system and give you feedback
- Ask riders to complete an onboard survey



Marketing might get someone on the bus for the first time, but only a good passenger experience will keep that person coming back.

Ask system employees — bus operators and customer service representatives — how they think passengers perceive the system.

Assess Your Image in the Community

Ask non-rider groups — community leaders, employers, stakeholders and gatekeepers (individuals or organizations that can provide access to potential user groups) — their views of the system:

- What kind of service does the system offer?
 - Fixed Route
 - Demand Response
 - Deviated fixed route
 - Paratransit
- Who is the service for?
 - General Public
 - Specific groups
- What groups use the service?
 - Workers traveling to their jobs
 - Middle, high school, college students
 - Clients of social service organizations
 - Seniors
 - Persons with disabilities
 - Low-income riders
- How does your service benefit the community; does it enhance quality of life?
 - Increased mobility for transit-dependent individuals
 - Economical transportation
 - Environmental benefits
 - Do employers depend on your service for their employees?
 - Is your service a viable option for visitors?
 - Are there other groups that could benefit from using your service?

Ask system employees — bus drivers, customer service personnel — their views of the system:

- Who are the system's principal riders?

- What groups represent potential riders?

- What value does the service bring to the community?

2. Resources Worksheet

How much budget should you allocate for marketing and passenger information expenses?

The rule of thumb is about 1% of your operating budget.

Operating Budget \$ _____ x 1% = Marketing Budget \$ _____

What other resources do you have to work with?

- Staff Time
- Volunteers
- Community Partners — Gatekeeper Organizations
- In-house printing capabilities (for flyers and posters)

Community Contributions

- Public Service Announcements
- Printing of Passenger Guides

Capital Budget

- Vehicle Graphics
- Bus Stop Signage

Budget Allocation

Allocate your financial resources to the strategies you plan to implement.

Item	Marketing Budget	Capital Budget	In-house/ Contribution
Branding	\$	\$	\$
Graphic Support	\$	\$	\$
Vehicle Graphics	\$	\$	\$
Bus Stop Signage	\$	\$	\$
Passenger Information	\$	\$	\$
Printing Passenger Guides	\$	\$	\$
Website Hosting & Maintenance	\$	\$	\$
Info Panels for Bus Stops	\$	\$	\$
Promotional Efforts	\$	\$	\$
Printing Posters and Flyers	\$	\$	\$
Media Advertising	\$	\$	\$
Schedule Holder/display Fixtures	\$	\$	\$

3. Goals and Objectives Worksheet

Goals and objectives are the why of the marketing plan — the reasons to market your system. Goals are long-term and are not easily measured. Objectives are shorter-term, measurable accomplishments that can lead to realizing a goal. Select the objectives that best describe what you want marketing to accomplish for your system. Modify or create more specific objectives as needed.

Build Awareness

- Increase visibility of the system through bolder branding of buses and bus stops
- Make people more aware of your services through greater outreach, public relations and promotion

Educate Potential Riders and Gatekeepers

- Educate gatekeepers for potential rider targets through outreach and staff presentations.
- Educate potential riders about transit services and how to ride through transit information displays at high traffic locations within the service area.
- Conduct group or individual travel training with potential riders.

Change or Enhance Image

- Insure that your transportation services are perceived as public transit, available to all potential riders.
- Create a positive, attractive visual image for the system through effective branding.

Enhance User-Friendliness of Services

- Make the system easy for new riders to try by providing easy-to-understand passenger information in print, online and through other relevant formats (e.g. multilingual or large format).
- Make the transit system easily accessible for occasional, spontaneous or transient riders by providing route and schedule information at the bus stop.
- Provide user-friendly fare media that are appropriate for your target markets and make fare media available through channels that are easily accessible.

Increase Ridership

- Promote new ridership among populations identified in the target market worksheet through advertising and promotional efforts that include appeals and images relevant to those groups.
- Conduct targeted promotional efforts by working through gatekeepers for key target groups to deliver customized passenger information, conduct travel training and provide incentives.

Build Community Support

- Position transit as an important community asset through public relations efforts that focus on public transit's community benefits.
- Make civic leaders and decision makers aware of public transit's community benefits through personal presentations.
- Insure that elected officials and other decision makers are well aware of transit's role, benefits and needs.

4. Target Markets Worksheet

Ridership Target Markets

For each potential target group, ask yourself:

- Can your system meet their transportation needs (destinations, hours, reliability)?
- Does your service offer them a relevant benefit (mobility, convenience, money savings, time savings, independence)?

If the answer to both questions is “yes” then they are a potential target market for increasing ridership. Which groups are your target markets?

- | | |
|---|---|
| <input type="checkbox"/> Low-income families | <input type="checkbox"/> Older adults/retirees |
| <input type="checkbox"/> Local retail and other low-wage workers | <input type="checkbox"/> Persons with physical disabilities |
| <input type="checkbox"/> Local white collar workers | <input type="checkbox"/> Persons with cognitive or emotional disabilities |
| <input type="checkbox"/> Longer distance commuters | <input type="checkbox"/> Persons with limited English proficiency |
| <input type="checkbox"/> Job seekers | <input type="checkbox"/> Visitors or tourists |
| <input type="checkbox"/> College students | <input type="checkbox"/> Special event attendees |
| <input type="checkbox"/> Secondary students (high school and middle school) | |

You can prioritize your target markets by asking yourself:

- How important is serving this group to the goals and objectives of your organization?
- How much ridership potential does this group offer in relation to the amount of resources required to market to it?

Non-Rider Target Markets

Ask yourself:

- What groups make decisions that impact your funding and support within the community?
- What organizations can be valuable marketing partners in promoting ridership among the target ridership groups you've identified?

These are important non-rider target markets and might include:

Decision Makers

- Elected Officials
- City or County Staff
- Transportation Advisory Groups

Marketing Partners/Gatekeepers

- Social Service Agencies
- Schools or Colleges
- Employers or Work Programs
- Other Gatekeepers

5. Marketing Strategy Worksheet

Fundamental Communications

These are strategies that every transit agency needs to utilize in order to identify its services and provide directions for using them.

① Branding

- Name and Logo
- Vehicle Graphics
- Bus Stop Signage (for fixed routes)

① Passenger Information

- Passenger Guide
- Website
- Telephone Information/Reservations

Additional Strategies

From these strategies, select those that are most appropriate for your community, transit system, objectives and target markets.

② Additional Passenger Information

- Information at the Bus Stop
- Google Transit
- Real-time Information

PRIORITIES

- ① Fundamental
- ② Recommended
- ③ Optional

For each strategy you select for your marketing plan, consider:

- Objective _____
- Target market _____
- Message (Benefit and Information) _____
- Resources required for implementation _____

Strategies for Building Awareness, Image and Support

Non-Paid Communications Channels

- ① News Releases
- ② Website Posts
- ② Email Announcements or Newsletters
- ② Public Speaking
- ③ Social Media (Facebook or Twitter)
- ③ Radio PSA's
- ③ Videos

Paid Media Advertising

- ② Transit Advertising
- ② Newspaper
- ② Posters
- ③ Radio
- ③ Television
- ③ Direct Mail
- ③ On-Line Advertising

Targeted Strategies for Generating Ridership

- ① Gatekeeper Outreach
- ② Permanent Information Displays
- ② Customized Information (audience-specific)
- ② Bulletin Board Posters and Flyers
- ② Website Links
- ② Orientation Packets
- ② Email blasts
- ② Newsletter Articles
- ② Travel Training
- ③ Fare Programs