



The future of mobility

*If the bus is to play a leading role in the long term future of urban mobility, we need to be **scanning the horizon now and sowing seeds of change** to ensure that a very different bus world stakes its claim to exist.*

*We shouldn't be spending time and energy implementing a retro 1980's governance model for yesterday's buses but be focused on **designing a new age of the bus looking toward 2030 and beyond.***

*This is the **seventh** of fourteen weekly articles on what different aspects of that new bus future could look like and the kind of things we need to be sowing seeds for now if we are to truly **ride the wave of future opportunity.***

*We need to **be bold if we are to shine** over the next 40 years and do more than invest in a zero emission fleet, tinker with governance and introduce the odd capped fare.*

Episode Seven – Marketing

The **marketing horizon of UK bus operators is currently built around an assumption** that the majority mode of mobility is the car and **that modal shift only exists at the very margins.**

Indeed, we have heard operators clearly state that their ambition is simply to encourage a proportion of car users to commute, say, one day a week by bus and see that as being transformational for their business given the significant differences in gross market share of the two modes.

That, however, **isn't going to move the dial in terms of *Net Zero.***

Those marginal shifts won't make a blind bit of difference to our congested polluted streets, the deaths caused by poisonous air and errant car drivers.

Modal shift at the margin will simply see those **semi environmentally conscious car commuters free up space in the traffic for more of the hard core car addicted** to join the throng.

Our Metro Mayors may also feel that a 50% growth in bus use by 2030 will be transformational but the real target to deliver the UK's commitment to *Net Zero* is around 800% by 2050.

Might be daunting but bear in mind **the car delivered that kind of transformation the other way round half a century ago** and we're now living with the unhealthy consequences.

We're not talking fine margins here. We're talking seismic transformation through a laser focus on the prize over the next three decades and need to equip ourselves with serious resources and serious people to lead the way.

The premise set out in **Episode One** of an *Active Travel and Mass Transit First Mobility* involves a seismic shift in market share.

We have already identified, in **Episodes One to Six**, that achieving that transformation requires a **fundamentally different long term approach to the bus business model** with significantly enhanced networks, a different approach to pricing and payment, with vehicles enhanced by more than simply a conversion to zero emission, enhanced infrastructure and more sophisticated use of technology.

We also require a **much more radical marketing strategy**.

The future Marketing Challenge is huge and long term.

Over the next 25 years, it should be possible for the **bus and car to swop market shares with the bus delivering well in excess of 60% of urban travel and the car down below 20%**.

That won't happen overnight.

Indeed it won't even happen over 25 years if we don't **change the mindset and ambition right now !**

If we believe in the need to deliver *Net Zero*, we need to believe in that market share shift and we need to sow the seeds right now.

It is a multidimensional challenge.

It involves individual operators, and the industry as a whole, actively influencing public policy on urban mobility at both local and national government level.

It involves **transforming the positioning and promotion of the bus product at an individual route, network, town and city level.**

It will require widespread **culture change.**

There will be a lot of interesting challenging jobs and careers in a bus industry pursuing this ambition over the next 25 years and the marketing roles will be amongst the most challenging and rewarding.

Making the bus the boss in the mobility world will be an adventure.

Climate Change and the Environment

Climate Change and the Environment will be at the heart of the marketing message but that message needs to be delivered in the context of a **bus offer and image radically different to what has prevailed over the last 50 years.**

We do not want people travelling by bus because it is a '*climate obligation*' but because it is a safer, healthier, more efficient, stylish, fashionable and attractive way to get around town.

That requires the delivery of the kind of **Networks** described in **Episode Two** utilizing the **Vehicles, Payment Systems, Infrastructure** and **Technology** set out in **Episodes Three to Six.**

Climate Change and the Environment will be the reasoning behind physical, financial, legal and cultural constraints placed on car use in urban areas by public authorities safe in the knowledge that genuine high-quality alternative means of mobility will be available through a combination of **Active Travel and Mass Transit.**

Climate Change and Environmental messaging will, however, be one of several components of bus marketing designed to achieve major modal shift toward **Active Travel and Mass Transit.**

Goal Setting

Before we set out on a journey of this magnitude, we **need to be very clear about the destination and the route.**

Every journey begins with a single step and that single step should be motivated by where the last step will take us.

This is **not simply a journey about the bus but about the nature of the planet and the nature of our towns and cities.**

We cannot and must not attempt to go on this journey alone but **with allies who also care about our planet, our towns and our cities.**

The whole collective needs to have the same vision for the destination and the route to get there.

So right now, we need to take stock of who's getting on the bus with us, how we can work together and agree where we want to get to.

Setting the **Goal** and building the alliances demands that we **begin to put the leaders of the marketing team together.**

We need to **devote resource at local and national level to live and breathe that challenge** and, relatively quickly, build a consensus on the **Goals** and how we get there.

Serious food for thought !

We know we have short term business challenges converting current fleets to zero emission, securing funding for development, dealing with day-to-day operating hassles around roadworks and stuff and recruiting enough drivers for the here and now but we also **need to lift our heads up toward the horizon and prepare for the even greater challenge of transformation to *Net Zero* ... now and not manana !**

In the short term, that's **not about budgets and money** – it's about **brain power, brainstorming, building alliances, building consensus** around the way to go.

It would be easy to decide now is not the time but with the magnitude of the task, **procrastination isn't the smartest move.**

There are plenty of allies out there and the sooner we turn those allies into a powerful united coalition with a clear set of **Goals**, the better.

Then the journey can begin.

Today, however, we're **not seeing a lot of evidence that anyone is taking that issue anywhere near as seriously as we should.**

We just glibly say that ***Net Zero*** will require a major modal shift from the car but **haven't really begun to think through the logistics.**

Time we did.

Choosing our initial allies with whom to set realistic **Goals** in pilot areas means seeking to **work with those people and bodies who recognise the root cause of congestion, poor air quality and poor mobility in our towns and cities.**

Traffic Management and Control

We hear a lot of discussion about poor bus services and Bus Service Improvement Plans which is **poor messaging.**

The **real issue in our towns and cities causing sub optimal bus services is the traffic environment in which they have to operate** leading to unreliability, slow operating speeds, reduced demand, rising costs and fares and, quite simply, **Bus Services cannot actually improve unless traffic is tamed, managed and controlled in a rational way to optimise the movement of people and not vehicles.**

It is by giving buses the space and freedom to do their job which will see them improve and **any local authority which believes that it can improve bus services without addressing the issue of traffic is deluding itself.**

If we are to start on the journey now of growing the market share of the bus, we need to **begin in those areas where government, local and national, are taking the issue of traffic congestion and its contribution to poor air quality and climate change seriously.**

Cities like Edinburgh, Nottingham, Brighton, Oxford and the whole of Wales are beginning to recognise where the true problem lies and the bus industry needs to ally with those authorities and work with them on the wider agenda to deliver true change.

We see a different situation in Cambridge and Bristol, for example, where there is **handwringing and complaint about the poor quality of public transport but no real recognition of the need to clear the traffic upfront first.**

The current Cambridge proposal to implement a public transport levy to fund improved bus services is meaningless without a parallel commitment to address the acute congestion across the breadth of the Combined Authority through a material reduction in car use, dependency and addiction.

We see a similar approach in Greater Manchester of reluctance to confront car use although it is mitigated to a degree by an understanding of the need for more bus

priority. However, we have yet to see **what happens when choices need to be made on access to scarce road space between cars and Mass Transit.**

As we move forward and deliver better Modal Shift and better Air Quality through prioritising **Active Travel and Mass Transit** in the early adopters, we can gradually expand the footprint of the **Active Travel and Mass Transit First** approach across the country.

We should, however, be crystal clear that the **marketing activity for the renaissance of the bus begins with winning hearts and minds to the cause of truly managing traffic** and fully prioritising **Active Travel and Mass Transit.**

In that context, pedestrians, cyclists, scooter users, skaters, tram and train users are our friends and allies as they are all likely to use buses, too, to travel in and between towns and cities.

So, the starting point for dramatically expanding bus market share is to embrace the issues of **Climate Change and the Environment**, to work with friends and allies to reprioritise the roles of **Active Travel and Mass Transit** in our cities at both a local and a national level.

We should not hesitate to **place that expansion in an international context** using examples from across Western Europe, Ireland, North America, South America, the Middle East, Asia, Australia and New Zealand.

The negative social, economic and environmental **impact of excessive car use is now increasingly being recognised across the World** and **the bus as a positive solution** if delivered well.

Product

We need then to draw together **all** of the activities and actions outlined in **Episodes Two, Three, Four, Five, Six**, and this **Episode Seven**, into a compelling customer proposition with a bus product we can all be truly proud of and **develop a radically different brand image for *The Bus*** for travel within and between our towns and cities.

The brand image needs to be **truly inspirational and compelling and sold consistently well across the country** as more and more areas harmonise the work of local authorities to clear the streets of unnecessary car traffic, making way for high quality **Active Travel Infrastructure** and high quality **Mass Transit.**

Promotion

Throughout the period of major transformation in the bus product, as it grows exponentially in scale and in market share, **marketing activity will grow disproportionately as the bus becomes ever more important** so it will need to be well funded.

Marketing teams will also need to **balance three objectives** throughout.

We will be making a **material contribution to 'saving the planet'** and we should reinforce that message continuously with solid evidence of progress.

We will also be **enhancing the social and economic infrastructure of our towns and cities** which will add to higher standards of health and happiness and underpinning economic growth.

Finally, we are **delivering a consumer product where high quality, targeted marketing and branding can increase demand.**

The industry and the community will need to invest heavily in building bigger networks, developing innovative pricing and payment, procuring ever better vehicles, enhancing infrastructure, and deploying technology and it will take **high quality marketing to optimise demand** to create a positive, growing business generating the income to constantly reinvest **in an ever improving bus product.**

Conclusions

Marketing, in its broadest sense, is **fundamental to building a bolder, bigger, brighter, better future for the bus** in the UK creating a business model serving a positive social purpose **in an environmentally and financially sustainable way.**

It is every bit as important as the work which needs to go into network design, pricing and payment, vehicles, infrastructure and technology.

We should not hesitate to **place the bus transformation in an international context** with the negative social, economic and environmental impact of excessive car use now increasingly being recognised across the World and the bus as a positive solution if delivered well.

Next Week

Another fundamentally important component of the bus renaissance, **People**, in **Episode Eight.**