



AGENDA

**MEETING OF THE
PLANNING & MARKETING COMMITTEE
OF THE
SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
A PUBLIC AGENCY
Tuesday, July 18, 2017
10:00 AM
John G. Britton Auditorium
550 OLIVE STREET, SANTA BARBARA, CA 93101**

- 1. CALL TO ORDER**
- 2. ROLL CALL OF THE DEVELOPMENT COMMITTEE**
Chuck McQuary, Committee Chair; Dave Davis, Director; Bill Shelor, Director
- 3. REPORT REGARDING POSTING OF AGENDA**
- 4. APPROVAL OF PRIOR MINUTES (ATTACHMENT- ACTION MAY BE TAKEN)**
The Board will be asked to waive the reading of and approve the draft minutes for the committee meeting of June 29, 2017.
- 5. PUBLIC COMMENT**
Members of the public may address the Committee on items within the jurisdiction of the Committee that are not scheduled for public hearing. The time allotted per speaker will be at the discretion of the Committee Chair. Please complete and deliver to the MTD Board Clerk, before the meeting is convened, a "Request to Speak" form including a description of the subject you wish to address.
- 6. MARKETING AND COMMUNICATIONS PLAN - (ACTION MAY BE TAKEN)**
Staff recommends the Committee authorize staff to forward the draft 5-Year Marketing and Communications Plan to the Board of Directors for approval.
- 7. OTHER**
The Committee will report on other related public transit issues.
- 8. ADJOURNMENT**

AMERICANS WITH DISABILITIES ACT: If you need special assistance to participate in this meeting, please contact the MTD Administrative Office at 963-3364 at least **48 hours in advance** of the meeting to allow time for MTD to attempt a reasonable accommodation.



MINUTES

MEETING OF THE
PLANNING & MARKETING COMMITTEE
OF THE
SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
A PUBLIC AGENCY
Thursday, June 29, 2017
10:00 AM
John G. Britton Auditorium
550 OLIVE STREET, SANTA BARBARA, CA 93101

1. **CALL TO ORDER**
Director Davis called the meeting to order at 10:05 A.M.
2. **ROLL CALL OF THE DEVELOPMENT COMMITTEE**
Director Dave Davis reported all members were present with the exception of Chair McQuary who was expected to arrive late.
3. **REPORT REGARDING POSTING OF AGENDA**
Lilly Gomez, Office Administrator reported that the agenda was posted on Sunday June 25, 2017 at MTD's Administrative office, mailed and emailed to those on the agenda list, and posted on MTD's website.
4. **APPROVAL OF PRIOR MINUTES (ATTACHMENT- ACTION MAY BE TAKEN)**
Director Davis moved to approve the draft minutes for the committee meeting of June 22, 2017. Director Shelor seconded the motion. The motion passed unanimously.
5. **PUBLIC COMMENT**
None was made.
6. **SERVICE WORK PLAN FOR AUGUST 2017-18 - (INFORMATIONAL)**
George Amoon, Planning Manager, discussed the initial priorities for the August 2017-18 service work plan. Mr. Amoon reported that staff may propose potential service reductions of up to 5% due to decreased fare revenue and ridership. Planning staff is reviewing the current routes on lines 20, 21x and Seaside shuttles to plan for the Via Real extension to Linden Avenue project proposed for completion in 2020. The Planning staff is reviewing Lines 27 & 28, servicing UCSB & Isla Vista, to identify ways to increase passenger capacity to accommodate additional students at the San Joaquin housing complex this fall. The line 15x will have a re-route to provide more direct service to SBCC. Additionally, Mr. Amoon and staff plan to gather more input from the public at the evening Board Meetings in the fall.

CHAIR MCQUARY JOINED THE MEETING AT 10:32 A.M.

7. FALL COMMUNITY OUTREACH PLAN - (INFORMATIONAL)

Hillary Blackerby, Manager of Marketing & Community Relations updated the committee on the tentatively selected dates and locations for the evening meetings to be held in the fall. MTD plans to hold meetings at 6pm on October 10 in the John G. Britton Auditorium, October 17 at the Carpinteria Council Chamber Office, and October 24 at the Goleta Council Chamber Office to offer more opportunity to the public to provide input.

8. MARKETING AND COMMUNICATIONS PLAN - (INFORMATIONAL)

Hillary Blackerby, Manager of Marketing & Community Relations updated the committee with a cost analysis and time frame for the rebranding roll out. The Committee reviewed and requested further detail on bus refurbishment and repainting.

9. OTHER

No other items were discussed.

10. ADJOURNMENT

Director Davis moved to adjourn the meeting at 11:23a.m. Director Shelor seconded the motion. The motion passed unanimously.



PLANNING & MARKETING COMMITTEE REPORT

MEETING DATE: JULY 18, 2017

AGENDA ITEM #: 6

TYPE: ACTION

PREPARED BY: HILLARY BLACKERBY

Signature

REVIEWED BY: GENERAL MANAGER

GM Signature

SUBJECT: Marketing and Communications Plan

RECOMMENDATION:

That the Committee authorize staff to forward the draft 5-Year Marketing and Communications Plan to the Board of Directors for approval.

DISCUSSION:

The Planning and Marketing Committee previously heard presentations and gave feedback on a draft 5-Year Marketing and Communications Plan (MCP) on March 9th, April 11th, and June 29th. Working with MTD's marketing firm, Celtis Ventures, MTD staff has incorporated feedback from committee members on priorities and strategies into the MCP.

The MCP has four core goals: improve customer experience and satisfaction, grow ridership and expand partnerships by marketing MTD services, support financial stability and an engaged workforce, and promote alternative fuels and sustainability. The plan outlines target markets, marketing tools, and a series of near-term objectives and long-term objectives for achieving the core goals.

Upon adopting a new logo and color scheme as part of MTD's brand update process, the board expressed concerns about the financial considerations of smart phasing of the new branding rollout. The MCP includes an appendix outlining a proposed schedule for this rollout and cost estimates for these updates, updating MTD assets in a phased and frugal manner.

Staff recommends that the Committee forward the draft Marketing and Communications Plan to the Board of Directors for review and approval.

ATTACHMENTS:

Draft Marketing and Communications Plan

DRAFT



MARKETING & COMMUNICATIONS PLAN

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EXECUTIVE SUMMARY

The purpose of this marketing and communications plan is to help the Santa Barbara Metropolitan Transit District (MTD) build its brand, increase awareness and retain and attract customers.

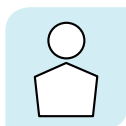
While many organizations simply react to marketing opportunities, this plan will help ensure that MTD consistently and purposefully aligns its communications activities with the agency's most important strategic goals.

To that end, the plan sets out and expands upon the following key elements to guide MTD's marketing and communications over the next five years.

CORE GOALS

1. Improve customer experience and satisfaction.
2. Grow ridership and expand partnerships by marketing MTD services.
3. Support financial stability and an engaged workforce.
4. Promote alternative fuels and sustainability.

TARGET MARKETS



Potential Customers



Seniors and People with Disabilities



Current Customers



College Students



Visitors



Area Employers



K-12 Students



Bicycle, Environmental and Other Constituent Groups

MARKETING TOOLS

MTD has a variety of communications tools at its disposal and an effective marketing plan makes strategic use of them all. The follow tools are cornerstones of MTD's marketing mix.

- Social Media
- Website
- Email Marketing
- Digital Advertising
- Traditional Advertising
- Video
- Media Relations
- Customer Information
- MTD Property and Vehicle Assets

NEAR-TERM OBJECTIVES

Combining each of these elements, the marketing plan outlines tangible, measurable objectives that work to achieve MTD's core marketing goals. While a comprehensive list can be found on pages 14 – 26, below are five major marketing objectives that the agency plans to accomplish in the near term. These represent that most efficient and impactful ways MTD can use its marketing resources to immediately advance its core goals.



- Initiate an MTD brand refresh to improve awareness, public support and ridership — beginning with the 2017 Bus Schedule Guide



- Introduce a new real-time service information system to customers, including smartphone app



- Update the MTD website



- Strengthen relationship with UCSB and SBCC and market directly to their students and employees



- Promote MTD's most robust and high-frequency service

LONG-TERM OBJECTIVES AND TIMELINE

In the end, this document is a roadmap to achieving customer-focused, end-to-end marketing and communications. Its objectives and timeline create a path for MTD to follow to ensure that its brand and messages are consistently applied to every aspect of the agency and that every communication is leveraged to increase awareness, grow ridership and build support for MTD.

SWOT ANALYSIS

A marketing and branding situation analysis was completed in early 2017. MTD's marketing consultant conducted interviews with MTD staff and referenced existing ridership data and survey information. Comments and themes provide the basis for the revised MTD brand. Updated market research is recommended to enable MTD to further refine its market intelligence.

STRENGTHS

- Exceptional, long-standing public transportation system
- Strong community and business support
- Financially stable
- Operates in a vibrant, desirable community

WEAKNESSES

- Aging brand
- Difficulty in hiring new bus operators
- MTD may lack public awareness
- Declining ridership
- Perception of transit as stigmatized

OPPORTUNITIES

- Partnerships with local educational institutions
- New buses on order
- Intelligent Transit System recently installed
- Update to transit center on the way
- MTD operates in a vibrant, supportive community
- MTD has a brand refresh in the works

THREATS

- Difficult, competitive environment
- Changing demographic, consumer and commute patterns
- Declining farebox revenues
- Increased road congestion



27 ISLA VISTA

CORE MARKETING GOALS

Based on the Strategic Plan, MTD has identified four core marketing goals. These core goals contain multiple marketing objectives, audiences, strategies and tactics, all designed to help MTD deliver on its promises.

1. Improve customer experience and satisfaction
2. Grow ridership and expand partnerships by marketing MTD services
3. Support financial stability and an engaged workforce
4. Promote alternative fuel and sustainability

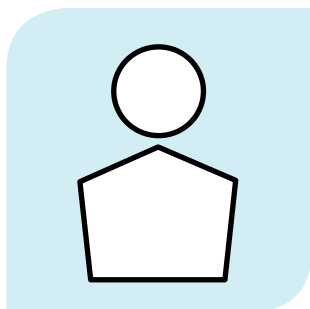
KEY MARKETING STRATEGIES

To accomplish its core marketing goals, MTD has prioritized the following strategies:

- Refresh the MTD brand across logo, vehicles, stops, facilities, print and digital collateral
- Conduct research to gain current market intelligence
- Leverage real-time rider information for improved customer experience
- Redesign the MTD website
- Enhance engagement with MTD customers and constituents
- Strengthen partnerships with educational institutions
- Expand use of social and digital media
- Use local traditional and digital advertising to attract prospective riders
- Promote best and most frequent service
- Aggressively target local employers
- Partner with other sustainable organizations and advocates

TARGET MARKET STRATEGIES

Potential Customers



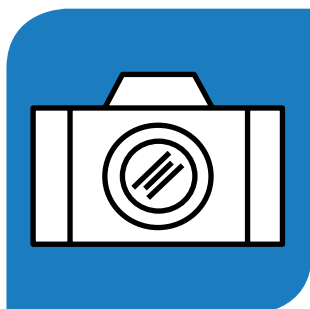
- Target daily commuters (area employers and employees)
- Promote best (most frequent) services
- Strengthen/refresh the MTD public brand
- Market services digitally and drive people to the newly designed MTD website and trip planner

Current Customers



- Keep current customers well informed about new products and services
- Provide information in real time (when possible)
- Build a sense of ownership of the MTD system
- Engage through social media

Visitors



- Strengthen the MTD public brand on the street and online
- Promote shuttle services
- Emphasize the Day Pass as a convenient option
- Promote Transit Transfer program with Amtrak
- Partner with local tourism and visitor bureaus to communicate MTD services

K-12 Students



- Outreach through participating schools
- Focus on “how to ride” and safety information
- Youth pass

TARGET MARKET STRATEGIES

Seniors and People with Disabilities



- Outreach directly to senior groups and centers
- Partner with organizations that serve the disabled community
- Emphasize mobility and freedom
- Promote lower fare (for 62+ seniors and people with disabilities)
- Promote shuttles and standard service as a convenient alternative

College Students



- Conduct direct outreach to campuses
- Market pass programs
- Market best service
- Communicate reasons to ride
- Market destinations available to students via one direct MTD trip

Area Employers



- Conduct direct outreach to area employers
- Create information kits for employers to disseminate to employees
- Target employers located in areas with superior service

Bike/Other Constituents



- Outreach directly to constituent groups
- Form/strengthen partnerships
- Communicate how MTD benefits their efforts

MARKETING TOOLS

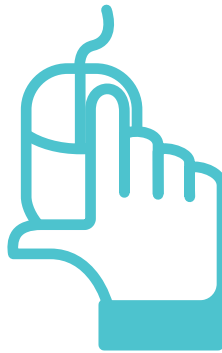
MTD has a variety of marketing tools at its disposal and an effective marketing programs requires a mix of them all. In the long-term, MTD must move towards customer-focused, end-to-end marketing in which the agency's brand and messages are consistently applied to every aspect of the system, from vehicles and facilities, to signage and schedule guide, to digital and print collateral.

Given the realities of transportation funding, however, it is particularly important for MTD to maximize its use of relatively low-cost and/or partnership-leveraged marketing tools. Digital media, both organic and paid, will be a touchstone of the agency's marketing efforts.



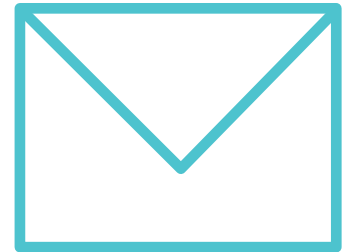
Social Media

- Facebook, Twitter, Instagram, LinkedIn
- Mix paid and organic posting
- Generate awareness, likes, web visits, trip planning, etc.
- Build digital relationships with real-world partners



Website

- Complete refresh
- Real-time customer information
- Increased interactivity
- Social media integration



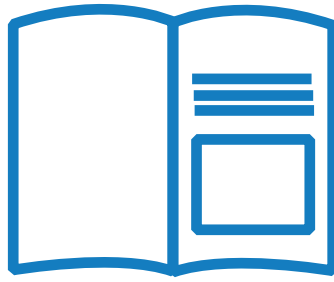
Email Marketing

- Consistent in brand and message
- Action-oriented
- Drive readers into other MTD digital channels
- Leverage for partner cross-promotion



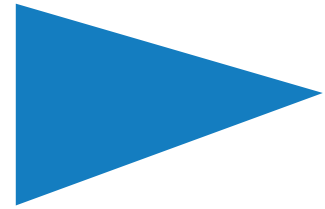
Digital Advertising

- Social media
- Google AdWords
- Geo-targeted digital displays



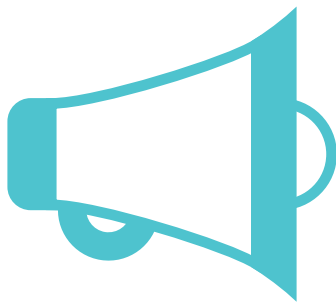
Traditional Advertising

- Print
- Radio
- Environmental
- Partnered cross promotion



Video

- Short and inexpensive to produce
- Used to enhance social media
- Used to enhance website
- Used to enhance digital advertising



Media Relations

- News releases
- By-lined articles in print and online outlets
- Editorials
- Articles in partner newsletters



Rider Information

- Schedule Guides (Bus Book and pocket guides)
- Real-time smart phone app
- Car cards (interior bus signage)
- Take-ones and seat drops



MTD Property Assets

- Transit Center
- Bus fleet
- Signage
- Info Posts
- Fare boxes

ACHIEVING GOALS

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The following provides a more detailed approach to meeting MTD's core marketing goals:

1. **Improve customer experience and satisfaction**
2. **Grow ridership and expand partnerships by marketing MTD services**
3. **Support financial stability and an engaged workforce**
4. **Promote alternative fuel and sustainability**



1. IMPROVE CUSTOMER EXPERIENCE AND SATISFACTION

Introduce new, real-time technologies for customer information

MTD will launch new technologies, such as mobile app, SMS texting, and website upgrades, to provide real-time bus arrival, service alerts, and other customer information. The agency will facilitate roll-out and adoption with targeted promotions and clear, friendly user instructions.

TARGET AUDIENCE:

MTD Customers, Potential Customers, MTD Employees



TACTICS

- Website integration
- Email notification
- Social media
- Online pre-recorded training available 24/7
- Take-one distribution
- Pocket-size material
- Geo-targeted digital promotion campaign

OBJECTIVE B

Provide outstanding customer service and conduct robust outreach

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Every interaction with MTD should be a positive one--from drivers to customer service representatives, and all other employees. MTD will use creative methods to engage the community on issues of service planning and general input.

TARGET AUDIENCE:

MTD customers, Potential customers, Visitors, K-12 Students, College students, Bike/other constituents



TACTICS

- Enhance customer service training
- Use web tools to provide robust two-way communications with the public
- Hold occasional MTD Board meetings at different times and locations in the community for better access
- Set aggressive follow-up targets for compliment and complaint inquiries

Rebuild the MTD website to extend branding and provide better customer information

MTD will design an easy-to-use website in which new real-time customer information technologies are integrated with modern user interface and engaging graphics and video.

TARGET AUDIENCE:

MTD Customers, Potential Customers, Partner Agencies



TACTICS

- Streamline design
- Prioritize home page information
- Apply new branding
- Integrate new customer information technologies

OBJECTIVE C

OBJECTIVE D

Update MTD Transit Center for improved customer experience

As part of the current project to renovate the Transit Center, MTD will improve the facility by extending its new brand to the interior and exterior design and by creating customer friendly, brand-consistent signage as well as real-time digital displays.

TARGET AUDIENCE:
MTD Customers, Potential Customers



TACTICS

- Update signage
- Update printed informational materials
- Install real-time displays

Establish branded MTD bus stops and shelters

In keeping with its new brand, MTD will redesign bus stop and bus shelter signage to provide consistent, branded, and easy-to-understand customer information

TARGET AUDIENCE:
MTD Customers, Potential Customers



TACTICS

- Design consistent format for bus stops and display of information
- Update database of shelters to track scheduling and inventory

OBJECTIVE E

OBJECTIVE F

Continue to build customer confidence in the safety of the MTD system

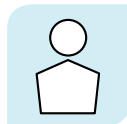
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Using brief customer-friendly materials and messages, educate customers about MTD's commitment to and steps taken to ensure safety and security on the system.

TACTICS

- Positive, reassuring, safety content on MTD website
- Social media
- Age-appropriate safety materials to schools

TARGET AUDIENCE:
MTD Customers, Potential Customers. K-12 Students



Promote convenient links between MTD and bicycling

Keep audiences informed of latest improvements to MTD bicycle facilities and market service to cyclists

TARGET AUDIENCE:
MTD Customers, Potential Customers, Bicycle Organizations

TACTICS

- Use social media, email, and partner agencies to announce facility improvements
- Create/Update facilities map as needed, post online, and have available at Transit Centers
- Create videos for website on how to take a bike on the bus
- Digital campaign (email, social media, online)



OBJECTIVE G

2. GROW RIDERSHIP AND EXPAND PARTNERSHIPS BY MARKETING MTD SERVICES

Invigorate and refresh MTD brand to improve awareness, support, and attract new customers

MTD has already begun the process of refreshing its brand with Board approval of a new logo. To continue the process, MTD will develop style guide to ensure consistent use of the brand and use its fleet, facilities, website and social media to extend brand awareness.

TARGET AUDIENCE:
*MTD Customers, Potential
Customers, Visitors*

TACTICS

- Update all agency online, digital, and print collateral per style guide
- Explore new design for MTD fleet and facilities
- Develop multi-year approach to applying branding throughout agency



OBJECTIVE B

Promote robust and high-frequency service

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MTD will promote new and expanded service directly to audiences who can easily access it. A master design, look, and feel for the campaign will be developed with messages and images tailored to each audience. Once established, MTD will maintain ongoing communications to continually promote service.

TACTICS

- Digital campaign (email, social media) to residents, businesses and institutions along service route(s)
- Feature on MTD home page for first month of service
- Geo-targeted digital media campaign (social media, email, online)

TARGET AUDIENCE:

MTD Customers, Potential Customers, Partner Agencies, Seniors and People with Disabilities, K-12 Students, College Students, Visitors, Area Employers



Market service to niche markets (specific regions, employers, diverse communities, etc.)

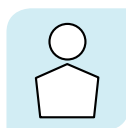
As new service is made available or opportunities arise (i.e. start of school year, Fiesta), MTD will create branded campaigns to market service to niche markets.

TACTICS

- Geo-targeted digital campaigns (email, social media, online)
- Cross promotion with relevant partners
- Transit Center signage
- On-board postings
- Bus exterior ads

TARGET AUDIENCE:

MTD Customers, Potential Customers, K-12 Students, College Students, Seniors, Visitors, Employers, Bike Groups



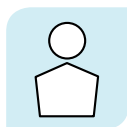
OBJECTIVE C

OBJECTIVE D

Promote service to area attractions and popular destinations

MTD will design fun and appealing campaigns that encourage both potential and existing customers to use MTD to access area attractions and popular destinations.

TARGET AUDIENCE:
MTD Customers, Potential Customers, Visitors



TACTICS

- Develop cross promotions with local attractions and special event providers
- Create a page on MTD website with destination-oriented map
- Geo-targeted digital campaigns (email, social media, online)
- Bus exterior ads
- Partnerships with visitors bureau, chambers, and hotels

Promote employee transit incentive programs

MTD will work with Traffic Solutions to promote employee transit incentive program with employer/commuter-specific print and digital collateral that clearly identifies benefits.

TARGET AUDIENCE:
Employers, Employees



TACTICS

- Geo-targeted digital campaign (email, social media, online)
- Leverage LinkedIn for B2B communication
- Create informational pamphlet for Employee Transportation Coordinators and Employers
- Provide worksite presentations
- Develop a page on MTD website aimed at employers and employees
- Develop monthly employer email program

OBJECTIVE E

OBJECTIVE F

Strengthen relationships with partner organizations

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MTD will market special pass programs and targeted promotional campaigns, share digital resources and undertake collaborative cross-promotions to bolster relationships with partner organizations.

TARGET AUDIENCE:

Colleges and Universities, Bike Coalition, Business Improvement Districts, Chambers



TACTICS

- Promote pass programs via digital campaign (email, social media, online)
- Post RSS feed on MTD homepage
- Repost, share and like relevant social media content
- Make RSS feeds available for partner sites
- Identify cross-promotion opportunities

Position MTD to participate in policy discussions regarding mobility

To position MTD to participate in policy discussions regarding mobility, the agency must encourage and facilitate communication with elected officials and partner agencies.

TARGET AUDIENCE:

Partner Agencies, Elected Officials, Community Stakeholders



TACTICS

- Prepare yearly legislative calendars
- Provide regular briefings for elected officials and partners
- MTD executive presentations at important events and conferences

OBJECTIVE G

3. SUPPORT FINANCIAL STABILITY AND AN ENGAGED WORKFORCE

Increase ancillary revenues through advertising and partnerships

MTD will continue to explore opportunities to create new revenue streams through advertising and partnerships.

TARGET AUDIENCE:

Local businesses, Partner organizations, Universities and Colleges



TACTICS

- Promote buses as moving billboards
- Design rate sheet with attractive pricing
- Explore other industry practices
- System and facility exploration for advertising/revenue opportunities beyond the fleet.

OBJECTIVE A

OBJECTIVE B

Market special pass programs and evaluate to optimize revenue

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Special pass programs provide an opportunity for MTD to tap into specific markets and incentivize specific customer groups to ride the system. MTD will provide clear customer information and targeted promotional campaign to help optimize revenue through these pass programs.

TARGET AUDIENCE:

Students, Seniors, Employees, MTD Customers, Potential Customers



TACTICS

- Use social media to target specific audiences
- Promote pass programs via digital campaign (email, social media, online)
- Create pages on MTD website to organize pass information
- Deliver presentations to interested groups

Educate potential employees about fulfilling public service careers with MTD

MTD will position itself as a provider of quality career opportunities for Santa Barbara area residents. Employment information will be accessible and easy to navigate.

TARGET AUDIENCE:
Potential Employees



TACTICS

- Participate in and develop recruitment materials for job fairs, etc.
- Use fleet as promotional tool
- Create relationships with colleges and universities
- Create collateral that highlights benefits
- Foster and strengthen partnerships with local workforce development organizations

OBJECTIVE C

OBJECTIVE D

Enhance employee communications

MTD will take strides to keep employees continually informed and engaged in the vision and success of the agency by making information easily available and empower employees through two-way communications.

TARGET AUDIENCE:
MTD Employees, Future MTD Employees



TACTICS

- Disseminate quarterly employee newsletter (print & email)
- Educate employees about professional & leadership development opportunities
- Remind employees about health & wellness programs
- Educate employees about greater MTD vision

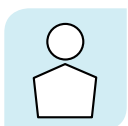
4. PROMOTE ALTERNATIVE FUELS AND SUSTAINABILITY

Promote benefits of electric buses

MTD will promote the benefits of its fleet of clean, alternative-fuel vehicles by emphasizing sustainability and cost savings in public communications. Marketing efforts will position MTD customers as community sustainability heroes.

TARGET AUDIENCE:

*MTD Customers, General Public,
Partner Organizations*



TACTICS

- Use social media to regularly communicate benefit
- On-board posting of benefits
- When space permits use external bus ads
- Create page on MTD website dedicated to alternative fuel and sustainability

OBJECTIVE B

Promote MTD ridership as a green alternative to driving

MTD will engage with community partners and leverage existing sustainability events to help promote MTD ridership as a green alternative to driving alone. Communications will link behavior change to facts about environmental impacts and benefits.

TARGET AUDIENCE:

Potential Customers, Partner Organizations, Employers and Employees, University Students, K-12 Students



TACTICS

- Launch digital campaign (email, social media, online)
- Promote relevant campaigns from partner agencies
- External bus ads
- Partner with local schools, colleges, large employers
- Promote Bike Week, Dump the Pump Day, Earth Day etc.

FIVE YEAR PLAN

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1

- Partner with UCSB and other educational institutions
- Position MTD to improve bus operator recruitment
- Introduce AVL/real-time technologies
- Conduct market and rider research to identify opportunities for improvements and growth
- Initiate redesign of MTD website
- Partner with bike community and other constituents
- Initiate MTD Brand refresh
- Initiate Transit Center Renovation
- Update MTD Schedule Guide Book
- Launch new electric shuttle fleet

2

- Launch new website
- Begin to update bus stops and facility signs
- Launch branded Smart Card
- Complete Transit Center Renovation
- Conduct direct outreach to area employers
- Market heavily to local universities/colleges
- Improve awareness of MTD
- Strengthen two-way communications with MTD employees

3

- Launch rebranded bus fleet
- Complete update of bus stop signs
- Launch campaigns with partner agencies to target visitors
- Initiate senior marketing program
- Conduct a customer satisfaction study
- Focus heavily on ridership campaigns
- Improve perception of MTD services

4

- Continue ridership efforts
- Market best services
- Review MTD fare structure
- Implement safety and courtesy communications program
- Strengthen relationships with area employers
- Target commuters for ridership growth
- Build support among communities
- Continue fleet rebrand
- Complete update of facility exterior signs

5

- Continue MTD's proactive marketing and communications efforts
- Position MTD for sustained ridership and revenue growth
- Complete MTD brand refresh

MARKETING CONTINGENCY PLAN

Marketing MTD does not happen in a vacuum. External factors will influence and affect strategies and tactics. The recommendations in this document can be scaled to fit changing budgets, schedules and staff capacity. Some of the factors that may impact the marketing plan include:

RISKS	MITIGATION STRATEGIES
MTD staff capacity	Minimize reactionary marketing and public outreach. Select marketing and partnership opportunities based on ROI and alignment with marketing plan.
Changes to MTD staffing (reduction)	Identify interim staff persons to coordinate marketing plan implementation. Prioritize most urgent and impactful marketing activities.
Changes to MTD marketing budget	Reduce paid advertising. Minimize non-essential event participation. Rely more heavily on digital media. Phase “big ticket” marketing activities over several years.
External trends, policies and perceptions of public transit	Keep ahead of trends through strategic planning, careful industry observation and communication with partners. Leverage digital media to change messages and tactics quickly in response to changing larger social, political and economic developments.
Changes in technology	Monitor social and digital media trends in the general public, government agencies and the private sector. Adapt strategies to align with best practices.

MEASUREMENT AND REPORTING

Data measurement and analysis is the heart of any marketing program. On a quarterly basis, MTD will report on the performance of its marketing efforts. This information will allow the agency to continually and strategically adapt and improve its marketing program to achieve maximum results.

- Hits, Bounce Rates, and other Website Data
- Ridership
- End-User Actions through Digital Advertising
- Feedback from Community Leaders
- Social Media Reach and Engagement
- Survey Responses
- Impressions through Media Outlets

APPENDIX 1:

MTD BRANDING ROLLOUT PLAN

In April 2017, the Board adopted a new logo and color scheme for MTD. This is the first step in a branding refresh that will ultimately impact every aspect of the agency from the look of its buses, signage and property assets to its digital presence to the way MTD communicates with customers, partners and the community.

This appendix addresses both how and why a brand refresh is integral to the success of MTD's overall marketing effort.

Over the next five years, MTD will embark on a systematic effort to apply and leverage this new brand across every part of the system. Due to the inherent limitation of transit agency funding, this change will happen gradually, but it will be guided by the principles, strategies and timelines below.

MTD's new brand will:

- Establish MTD as a transit leader and provider of a valuable service to the South Coast community
- Educate about MTD's services, accomplishments and innovations
- Engage the community to see MTD as central to addressing the region's transportation and environmental issues as well as current and potential customers to move them to ride MTD

BRAND IMPLEMENTATION STRATEGIES

In rolling out the new brand across the MTD system, staff will:

- Opportunistically evolve the MTD brand, taking advantage of natural opportunities in the operational cycle when the agency invests in high-profile updates
- Implement tight control of graphic standards through a new style guide, messaging guide and designed templates
- Educate and inform the MTD Board and workforce and gain organizational buy-in

YEAR 1

FY 2017/2018

Q1 Develop style guide

Update social media channels

Update routine business communications (letterhead, business cards, PPT template)

Update Schedule Guide and Shuttle Cards

Launch branded Bus Tracker App

Q2 Update community event supplies

Update report templates

Q3-4 Update driver uniforms

Update vehicle pool vehicles (decals)

Update MTD Website

YEARS 2-5

FY 2018/19 – FY 2023/24

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Update fare media (begin with launch of Smart Card scheduled for 2018)

Update Transit Center interior and exterior signage (during planned renovation in 2018)

Update bus design (begin with 14 40' buses scheduled for delivery in 2019)

Update bus stop signage (as funding permits)

Update MTD HQ exterior and interior signage (as funding permits)

Update interior car cards (as needed)

Update print collateral (as reprints or new materials are needed)

WHAT COMES NEXT: E3 AWARENESS CAMPAIGN

After reaching critical mass on branding, MTD will launch a campaign that raises awareness about the agency and its services. The campaign will drive people to the agency's updated website and refreshed social channels and promote MTD service.

BUDGET BREAKOUT

FY 2018/19 – FY 2023/25

Potential Schedule of Expenditures

Pending

Year	Classification	Item	Cost
1	Capital	Transit center signage	\$2,185
1	Operating	Driver uniforms (shirts, hats)	\$10,000
1	Capital	New MTD Website	\$75,000
2	Operating	Fare media design	\$3,000
2	Capital	MTD HQ exterior signage	\$1,000
2	Capital	Bus stop signage	\$84,500

Completed or In Progress

Year	Classification	Item	Extended Cost
1	Operating	Community event supplies (tablecloth & banner)	\$2,400
1	Operating	Seaside & Downtown/Waterfront Shuttle rack card redesign	\$6,175
1	Operating	Routine Business Communications (letterhead, business cards, powerpoint template)	\$7,410
1	Operating	Style Guide	\$5,700
1	Operating	Promotional items (bags, pens, magnifiers, reflective bands)	\$5,800
1	Operating	Schedule Guide update	\$19,000
2 & 3	Capital	Pool vehicle decals	\$100 per vehicle

BUDGET BREAKOUT

FY 2018/19 – FY 2023/25

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Bus Replacement & Refurbishment Schedule (8 Year Cycle)

Bus Replacements

Year	Qty	Scheduled Rebranding	Age at Time of Replacement	Year Placed in Service	Manufacturer	Length	Cost Estimate
1	14	FY 2019-20	22 years old	1998	Nova Bus Corporation	40' Bus	-

Bus Refurbishments

Year	Qty	Scheduled Rebranding	Age at Time of	Year Placed in Service	Manufacturer	Length	Cost Estimate
1	26	FY 2019-20	16 years old	2004	Gillig Corporation	40' Bus	\$208,000
2	41	FY 2020-21	15 years old	2006	Gillig Corporation	29' Bus	\$328,000
3	3	FY 2021-22	8 years old	2014	Nova Bus Corporation	60' Bus	\$24,000
5	5	FY 2023-24	8 years old	2016	Gillig Corporation	40' Bus	\$40,000
6	3	FY 2024-25	8 years old	2017	Gillig Corporation	40' Bus	\$24,000

Assumptions

- Electric vehicle fleet not included in schedule. MTD and the City will collaborate with Downtown partners on rebranding the shuttles in the future.
- This leaves MTD with 78 buses that will require refurbishment at some point and are reflected in the schedule above.
- Assume an 8-year mid-life refurbishment cycle for the fleet. We typically forecast keeping buses for 15 years.