

Introduction

The Enhanced Partnership arrangements facilitates the delivery of the ambitions of the West Midlands Bus Service Improvement Plan (BSIP)¹ and the nine objectives set out in the *'Strategic Vision for Bus'*².

The BSIP includes a significant programme of passenger led recovery actions and incentives to help the recovery of the bus network. The programme has been designed around the BSIP output of 'Lower, Simpler Fares and Ticketing,' studies around habit forming within public transport and the wider BSIP objectives.

The BSIP output 'Lower, Simpler Fares and Ticketing' contributes towards the following outcomes:

- More bus trips retained, regained, and attracted.
- More bus passengers are former car users.
- Faster growth in bus trips and with operators other than the largest.
- Fewer car trips, especially to centres.
- More bus trips by older and disabled individuals.
- More affordable travel.

The programme will support delivery of this by offering:

- Incentives to get people out of their cars and to try the bus. These will involve free trials for people who currently use a car and identified as those most likely to be encouraged to change.
- Incentives to specific groups who suffer exclusion because they are unable to access transport. This will provide assistance for a set period to improve life chances (such as training opportunities or a job) and then encourage continued bus use at usual fares.

It will be aiming to incentivise at least 600,000 people to switch from cars to bus and aid an additional 145,000 people at risk of transport exclusion to access opportunities because of discounted or free bus travel.

Alongside other BSIP deliverables this programme will be key in enabling the wider patronage targets that are set out in the West Midlands BSIP.

In addition, this incentive programme supports delivery on nearly all of the other long-term wider benefits and objectives addressed in the BSIP both directly and indirectly, such as:

- Reduced living costs - reduced social exclusion.
- Reduced car dependence, new option values.
- Reduced traffic miles and congestion.
- A more sustainable local transport industry.
- Better jobs/services take-up – levelling-up and SEP progress.
- Improved air quality.
- Carbon emissions reduced and progress on #WM2041.
- Higher productivity and growth with fast Covid recovery.
- A growing younger population is supported.
- Better community physical and mental health and safety.

These objectives align and support wider WMCA policies for environment, health, social inclusion, jobs, and the economy. While the long-term increased bus passenger levels, and converting people to long term bus users, will help to support and sustain wider goals for bus in the region.

Programme Overview

Many of the programme incentive offers have been built using evidence from recent public transport and habit-forming studies, which suggest a significant financial incentive can encourage an individual to try alternative modes of transport. This is especially true if the individual has recently had their travel habits disrupted and the barriers for delivery and use beyond a financial incentive are kept low (Gravert et al, 2020. Ortmann et al, 2017. Thomas et al, 2016.). The studies also find that the larger the financial incentive, the higher the response rate. For example, Gravert et al (2020) found that when free travel was offered to individuals in their study, the interest in 4 weeks of travel was significantly higher than that of a 2 week

¹ [wmca-bsip-05-november-2021.pdf](https://www.tfwm.org.uk/wp-content/uploads/2021/11/wmca-bsip-05-november-2021.pdf) (tfwm.org.uk)

² <https://governance.wmca.org.uk/documents/s2240/Appendix.pdf>

offer, increasing responses to the offer by 16%, from a baseline of 42.8%.

As a result, many of the programme incentives will be delivered by offering at least one-month of free travel with an nBus ticket or awarding credit via Swift Go, TfWM's capping offer. This offers individuals the opportunity to form new habits while taking part in the programme and to then frictionlessly continue to travel via bus after their discounted travel period has come to an end. A full outline of the cohorts we will target in the modal shift and excluded access groups as well the incentives we will offer is outlined further in the sections below.

TfWM will lead the development of the incentive programme and complimentary promotion and information campaigns, with support from local operators. Each element will be taken forward separately, with delivery tailored to each incentive's requirements. TfWM aim to offer the first set of incentives by December 2022 **Error! Bookmark not defined.**, with the programme running until March 2025.

Modal Shift Target Groups

This group of incentives will aim to target individuals who are currently travelling via other modes, mainly car, or using bus but infrequently. This section will discuss who those individuals are, why TfWM thinks targeting these groups will lead to long term growth, and the incentive TfWM will offer to the customer.

Considering the discussed studies, TfWM initially plan to offer most individuals in this group at least 1 month of free travel, either in the form of a nbus ticket for potential frequent traveler's or as a Swift Go credit for potential infrequent traveler's (e.g., visiting a location once a week). Further months of discounted travel will be offered as incentive for customers to continue to travel after the free period is lapsed. This approach will ensure that the customers habits are embedded before paying for a full price ticket. The discount offered will differ depending on the group and the success of each incentive. TfWM and operators will monitor and adjust offers depending on the uptake and success of each group.

For those customers unlikely to sign up to a monthly subscription after the offer has ended, we

aim to send them a card with active 'Swift Go' functionality. This will remove barriers to customers who want to continue travelling but find a monthly subscription does not suit them. Swift Go will allow the individual to travel by bus without having to understand the current complex fare structure in the West Midlands, keeping barriers low. The customer will have the ability to either top-up their card or attach their bank details – then just tap and go, as with Oyster in London.

The individuals to be included in this group are as follows:

1. Individuals who drive to jobs at big local employers, including:
 - Public sector workforce.
 - Non-clinical NHS workforce.
 - NHS professionally qualified clinical staff.
 - Private sector workforce (including retail workers and part time workers).

60% of individuals in the West Midlands are commuting to workplaces using a car. Potential customers will be reached by contacting local employers. Car users will be targeted via surveys and employer car park usage stats. TfWM will initially offer a month of free bus travel, with a 2-month 25% discount for individuals who sign up for a monthly subscription ticket.

TfWM estimates this incentive will target 130,000 individuals across the 3-year programme.

2. Free trials for individuals whose travel habits may have been disrupted:
 - Individuals who are moving into new homes and intending to drive, either renting or buying.
 - Individuals who are starting new jobs or training and intending to drive, including new students, graduates, and school/college leavers.

Here, the goal is to capture individuals during a period of disruption when they are looking for a new solution to their travel needs. As previously discussed, these individuals are most open to trying new transportation, especially if there is financial incentive.

TfWM will initially offer a month of free bus travel, with a 2-month 20% discount. We estimate this

incentive will target 152,000 individuals across the 3-year program.

3. Free trials for individuals who drive and park at our Park & Ride sites, for example targeting:
 - Individuals who drive to railway stations.
 - Individuals who drive to tram park & ride sites.
 - Individuals who use Swift parking sites.

Based on the results of a recent survey TfWM customers were asked “What makes a ticket ‘good value for money’?”. In response customers suggested: time flexibility, multiple journeys, multiple passengers, and multiple modes of transport included. As part of this incentive, we plan to target customers travelling to use other modes by car, by offering a free monthly bus ticket to parking customers. We hope to expose customers to different ticketing types including bus, with the goal of improving perceptions of ticket value for money and introducing individuals to the bus for the first time so that it can be seen as a viable alternative to the car.

A key aim of this incentive is to convert ‘first and last mile’ journeys. For example, targeting individuals who park at rail and tram stops to switch from car to bus. This may eventually lead to increased bus usage in other parts of their life. TfWM has the potential to reach around 23,000 passengers with this incentive.

4. Free trial for individuals who make regular journeys outside of their workplace. This could include individuals travelling to the following places:
 - Council-owned leisure facilities.
 - Privately owned leisure facilities (gyms and climbing walls etc).
 - Strategic centres for shopping.
 - Football match season ticket holders.
 - Libraries.
 - Places of worship.
 - Care homes.
 - Individuals volunteering for charity work.

TfWM will is not only seeking to create a strong commercial bus market but to also support recovery within local public services and

businesses. For example, A Moving Communities Study (2021) finds West Midlands leisure centres have recovered by around 69%, less than the national average of 71%. They also find travel distance to UK leisure centres to have fallen from 17 minutes to 15 minutes since 2019, with a greater proportion of users travelling less than 5 minutes.

Unlike the previously suggested offers, here potential customers will be targeted using Swift Go credit loaded with the value of 10-day passes valid to use in a month period. Individuals will have the freedom to choose how they use this credit (e.g., single and day tickets or 3 and 7-day capping). The individual will have the ability to choose what works best for their travel needs. If they continue to travel after the first month, they will get a discount on their travel for the following 2 months, either via topping up their Swift Go account or linking their bank card.

TfWM has the potential to reach around 53,000 individuals with this incentive.

5. Free trials for people travelling by car infrequently to specific events or appointments. This could include:
 - NHS appointments.
 - Eye care and dentistry appointments.
 - Concerts and shows.
 - Other sporting events.

Although these individuals are not having their travel habits disrupted, they may be looking to make new and different journeys to attend appointments. We plan to intercept their decision making by offering them a free solution to their new travel dilemma.

Customers under this programme will also receive Swift Go credit, this credit will be for 1 day ticket a week across a monthly period. Again, individuals will have the freedom to choose how they use this credit (e.g., single and day tickets or 3 and 7-day capping). If they continue to travel after the first month, they will get a discount on their travel for the following 2 months.

TfWM estimates this incentive will target 45,000 individuals.

6. Encouraging the reactivation of lapsed customers.

Here, TfWM have used pre-covid data to understand how many customers travelled using bus before the pandemic but have not travelled post-lockdown. We will initially target these customers but will move to regularly use data to target customers as soon as we see either reduced or no journeys against their ticket or a cancelled ticket. Customers will be targeted with either a Swift Go card or a monthly subscription depending on their prior usage. All monthly subscription cards will be active with Swift Go if the customer decides not to continue with a subscription ticket, they can travel infrequently with Swift Go capping.

This scheme will target at least 62,000 individuals across the programme.

7. Upsell existing occasional customers to longer-term products.

Here TfWM have analysed how many customers are regularly buying 1- and 4-week tickets. TfWM will target these customers with a free one-month subscription to encourage these customers to move onto long-term tickets (subscription tickets are open ended with an automatic monthly renewal). To persuade customers to continue with their subscription, we will offer a further discount for 2 months to those who sign up. With this programme we hope to grow the nBus subscription ticketing scheme and encourage regular customers to travel even more by encouraging customers to choose a more stable and better value for money ticketing option.

This incentive will target in the region of 22,500 individuals across the program.

8. Free ENCTS (English National Concessionary Travel Scheme) companion to combat loneliness and encourage travel.

Here TfWM will target those holding an ENCTS card who are either travelling infrequently or have had reduced travel habits post-lockdown. Based on insight gathered from passholders we know some have not returned to bus travel due to safety concerns post-pandemic. Enabling ENCTS users to bring a companion, who they know, to support their travel free of charge, should help to alleviate anxieties linked with safety. We will then move to target new ENCTS sign-ups.

This scheme will offer Swift Go credit which will enable the family member or friend of an ENCTS card holder to travel using at least 10 West Midlands nBus day passes. The individual will be capped using the cheapest fare available based on their travel habits which may also trigger 3-day and 7-day tickets. Issuing Swift Go credit to the customer enables them the flexibility to travel in a way that works for them. Once the card is in the customers hand, they will have the ability to continue travelling beyond the incentive period by simply topping up or attaching their bank card, removing key travel barriers for the customer in the long run.

Each credit or ticket offered incentivises two individuals to travel. This scheme will help to encourage ENCTS card holders back to using the bus while introducing new customers onto the bus network. In addition, this incentive programme will help to tackle the loneliness issues being experienced by some of our ENCTS users.

TfWM estimates it will target the companions of 100,000 ENCTS card holders.

9. Free family weekend tickets.

Here TfWM and operators will target new customers and current customers travelling alone with free family travel. This is modelled on a similar promotion carried out by National Express Bus, who offered 24 hours of free travel to support National Clean Air Day. This will be heavily promoted and plans to expose new customers to the network by removing key barriers such as, ticket, price, operator and how to pay. It also alleviates potential fears customers may have around travelling alone for the first time on bus. Analysis will be carried out by TfWM to understand which areas, weekends and individuals should be targeted following which a full promotion campaign will be developed and delivered.

Initially, we estimate to offer around 100,000 group or family tickets as part of this offer, reaching up to 500,000 individuals.

In conclusion, the modal shift programme will aim to target individuals who are currently travelling by car or using bus but infrequently. By offering these incentives and intercepting travel habits we will help to attract new bus users in the region, reducing the reliance on car, and capture and

regain passengers who have stopped or reduced travel by bus.

Excluded Access Target Groups

These interventions involve buying free travel for individuals who may be unable to access transport and are, as a result, increasingly excluded from society and opportunities. We have prioritised groups from a much wider list, based on who TfWM and stakeholders believe to be most likely converted into long term users but currently do not use the bus for travel.

A free period of bus travel will be provided to enable new training, reintroduction into the workplace, rehabilitation, or support individuals through periods of hardships. To incentivise and ease the customer back into the full price ticket, in some cases we will offer a period with a phased discount. TfWM currently offer a similar scheme successfully called Workwise, targeting individuals who are starting employment after a period of unemployment.

Targeting and engaging with the groups identified in this category will be undertaken with multiple different agencies and organisations. Promotion and targeting of this scheme will be undertaken and developed in coordination with these bodies to ensure the mechanisms to deliver this reaches the target audience effectively.

The current list of prioritised groups consists of:

1. Those involved with the care system, including:
 - Carers.
 - Young carers.

Using TfWM and WMCA's links with the DWP, the Carers Trust and The Children's Society, we will reach out to individuals in the care system who are not currently using bus and offer 9 months of free travel to carers (specifically carers who are claiming carers allowance) and 12 months to young carers. A further 3 months of discounted travel will be offered to both groups if they choose to continue to travel by bus.

Young Carers are often looking after others while attending education, as a result their education

may be affected and may leave school lacking access to employment and further education or training. These groups face significant cost barriers to transport and often live in poverty. This scheme offers individuals an opportunity to escape from a cycle of exclusion, while encouraging new long-term travel habits and creating life-long bus users in the region.

TfWM estimates this incentive will reach around 5,500 individuals across the programme period.

2. Refugees who reside in the West Midlands.

As well as Ukrainian refugees, the region is home to people from Iran, Iraq, Afghanistan, and Eritrea, amongst other countries. These individuals are likely to build a long-term future in the West Midlands. We will use contacts from within umbrella organisations that support refugees to reach these individuals (e.g., Refugee Council and The UN Refugee Agency UK for UNHCR). This scheme aims to alleviate barriers to entering the job market or re-training by offering 12 months of free bus transport in the region. Once again, encouraging new long-term travel habits and creating life-long bus users in the region.

TfWM estimates this incentive will reach around half of the refugees in the region (approximately 3,000 individuals).

3. Those who have been through the criminal justice system, including:
 - Young people leaving the criminal justice system.
 - Individuals in the probation system.

This scheme aims to help some of the 20,000 individuals in the West Midlands currently in the probations system but not in prison. Individuals will be offered 9 months of free bus travel. The loss of earnings and frequent mental health issues seen in this group can be exacerbated by the stigma of a criminal record.

This idea comes from the recent "Prison Leavers Project: innovating to tackle the complex causes of re-offending," which looks to build robust evidence on what works to reduce re-offending. In the West Midlands, 'Change Grow Live' will be focusing on social inclusion and addressing barriers faced to prevent re-offending.

Here, providing this group access to transport will remove travel and financial barriers, encouraging and enabling individuals to re-enter society, re-train, and gain employment. As well as contributing to improving individual mental and physical health, through supporting social inclusion, this scheme aims to support in reducing re-offending as well as creating new long-term travel habits with bus at the centre. This is a great example of a scheme that has the potential to be self-sustaining, creating large numbers of loyal and life-long customers to support the network.

This incentive will aim to reach an estimated 25% of individuals currently in the probation system but not in prison.

4. Helping with local employment and skills, including:
 - Unemployed individuals.
 - NEETs (Not in Employment, Education and Training).
 - Individuals re-training.
 - Individuals starting an apprenticeship.
 - Care leavers.

This programme aims to support individuals into employment by removing transportation barriers. Individuals Classified as NEET or care leavers will receive 12 months of free travel, whereas individuals who are unemployed, seeking employment, re-training or starting apprenticeships will receive 3 months of free travel, followed by 3 months discounted travel.

It will be an expansion of the current Workwise scheme which currently offers two free 4-week tickets, followed by a third ticket with a 50% discount. Since 2017 this scheme has reached around 5,000 local people, of which, 83% use bus 4 or more days per week. TfWM will look to review and expand the current eligibility, in addition to increasing the length of the scheme from just under 3 months to 6 months. TfWM will have the ability to analyse the success of each offer to understand the long-term viability of expanding the Workwise scheme beyond the 3-year period of this programme.

One of the more vulnerable groups here are care leavers; defined as individuals who have been in care of the local authority for a period of 13 weeks or more spanning beyond their 16th birthday. To contact this group TfWM will use their contacts

within the social value agency, Spectra. Offering free transport to this group for a period of 12 months will remove key financial and mobility challenges faced, as these individuals move into education and work while leaving the care system.

We hope that this scheme creates life-long, loyal customers in the region as well as supporting individuals into the workplace and reducing the long-term social exclusion that can be faced by these groups. This incentive will reach approximately 45,000 vulnerable individuals in the region.

5. Targeting specific local groups via charities:
 - Charities supporting poverty.
 - Charities supporting vulnerable people experiencing domestic violence.
 - Charities removing barriers to opportunity.
 - People residing in social housing or affordable housing.
 - Homeless people.
 - Veterans.

This scheme aims to support a variety of different vulnerable groups through charities. Again, by offering free tickets we aim to reduce isolation, reduce social exclusion, and support individuals through periods of hardship. We hope this removes mobility and financial barriers to support individuals in breaking cycles of poverty, abuse, and loneliness to better their quality of lives in the long run. TfWM hopes to support individuals to create new travel habits centred around bus, leading to life-long loyalty.

This incentive will reach approximately 45,000 vulnerable individuals in the region, offering different levels of discount depending on group vulnerability.

6. Improving local health and well-being, including:
 - Social prescribing.
 - Individuals in poor health but do not qualify for a ENCT's Disability Pass.
 - People from low-income households.

TfWM will use existing links with local health authorities and the WMCA teams who work within this area, to find and offer tickets to individuals who may be suffering with poor health and well-being. As part of this scheme tickets will be offered

through social prescribing schemes, where individuals suffering with poor physical and mental health will be supported on journeys to locations that may improve their health. Transport has been reported as a barriers individuals face when accessing the current provided support local NHS services. TfWM will also look to support individuals who apply for the ENCT's Disability Pass but do not meet the eligibility criteria, as set out in the Transport Act 2000, to qualify for the full concession.

Individuals will be offered Swift credit equivalent to the value of 10 nBus day tickets, the customer will have the flexibility to travel how they like and will be capped at the cheapest fare. The customer may trigger a 3-day or 7-day cap. TfWM plans to work with the local NHS to introduce a travel solution to individuals who may be visiting new places due to social prescribing, encouraging individuals to choose bus when forming new habits. We hope that this scheme will encourage long term habit formation and customers.

TfWM estimates this incentive will offer around 54,000 months' worth of travel to individuals across the 3 years.

In conclusion, the excluded access programme includes buying free travel for individuals who may be unable to access transport and are, as a result, are increasingly excluded from society and opportunities. This programme aims to build long term travel habits and customer loyalty to bus in the West Midlands area.

Further Information	
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