Fast Forward: Measuring Outcomes of Value-Oriented Public Transit Advertising

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Abstract

Branding, marketing, and advertising play important roles in influencing travel behavior and shaping public opinion about public transit. Over the past five years, marketing efforts in North America have increasingly featured messages that promote the value of riding public transit. These campaigns underscore a somewhat broader marketing effort that seeks to distinguish public transportation as a better value than commuting by automobile, a position that is bolstered by a weak international economy, a spike in fuel prices, and growing public awareness and concern about environmental issues.

Scholarly analysis of public transit marketing—including advertising and branding—has been limited; a scarce availability of reliable data presents difficulties for researchers. The differences between marketing in the public and private sectors create an uneven basis for rigorous comparison of advertising practices in sectors of the transportation industry. In addition, for many transit managers, marketing falls outside the realm of necessary operations and becomes unimportant relative to other more principal tasks. The unmet need for critical examination of public transportation marketing efforts leaves the efficacy of transit marketing efforts untested, which is evidenced by both a gap in academic literature that distills best practices but also the gap in professional practice that demonstrates a reluctance to spend scarce resources on marketing activities. Because of this complex landscape, the long-term value of public transit marketing relative to marketing efforts across other transportation sectors is unclear.

This study examines the proliferation of value-oriented advertising messages, environmental brand designs, and vehicle livery across public and commercial transportation sectors. A critical analysis of advertising messages in 200 North American public transit markets yields a typology that uncovers contemporary advertising practices. Likewise, a similar analysis of methods of graphic, visual, and environmental communication across 10 major transportation companies establishes the overall depth of marketing, branding, and advertising practice among them. Compared to long-established marketing efforts in other transportation sectors (commercial carriers, freight, and automobile manufacturers), we compare the approach and consistency of the public transit agency practices. With this technique, we examine best practices and short-term outcomes of advertising in response to situations external to a transit agency from which transit managers can objectively evaluate future efforts.

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Introduction: branding across four sectors of transportation.

Company brands, which function as constituents of comprehensive marketing programs, are articulated in a variety of ways, but mainly through visual means. For organizations in the transportation sector, brands are commonly expressed through the design of collateral materials, environmental design, and vehicle livery and are reinforced by brand-oriented advertising. This study first examines the articulation of public transportation brands across various media through which transit agencies advertise or market. Next, we examine branding practice across three other transportation sectors—automobiles, commercial carriers, and freight carriers. Our investigation focuses on two key modes of brand communication across the sectors—advertising and environmental design/vehicle livery. An analysis of the practices in each of these areas is then compared to the practices of public transportation providers.

We demonstrate that relative to the three other major transportation sectors, public transit is the most anemically and least consistently branded. Commercial carriers (including airlines, long-distance bus companies and rail service), freight and parcel carriers (including FedEx, United States Postal Service, Deutsche Bahn and UPS) and automobile companies (including Ford, Chrysler, Toyota, and GM) all cultivate and maintain active brand positions. In sharp comparison, most public transit agencies do not (Cronin and Hightower 2004). Our analysis reveals that although public transit agencies are engaging in marketing, branding, and advertising most agencies lack long-term brand planning and as a result focus on short-term advertising which causes the agencies to forgo objective evaluation in exchange for near-immediate results. In comparison to marketing activities across other transportation sectors, our analysis suggests that transit advertising seems to be less consistent, poorly planned, and of a lower overall aesthetic quality.

Throughout this paper, we refer to marketing as an overarching operational activity that encompasses branding, advertising, and to some extent, public relations. Branding includes the planned and consistent use of a name and the aesthetic manner by which that name is deployed across all materials and media. A brand identity is commonly conveyed using a logogram (a symbol-based graphic element) or a logotype (a word-based graphic element) or a combination of these, generically referred to as a "logo." A brand identity typically includes a very specific selection of colors used to represent and visually support the logo. Nearly all successful brands are governed by very specific rules for use and are guided by a plan for deployment which ensures consistency and longevity of the brand.

Brands in the transportation industry are articulated most commonly through the use of signature colors and logo on the livery—the painted decoration—of vehicles. Transportation brands are also found in the built environment across properties, buildings, and facilities used by a particular organization. Bus, train, and multi-modal stations; train, bus, and BRT stops; garages; warehouses; hangars; maintenance facilities;

administrative facilities; and retail service centers nearly always feature brand elements prominently throughout the design of these spaces. Likewise, collateral materials—the printed and digital materials through which organizations disseminate important information to customers—often feature brand elements, whether as an aesthetic treatment, or the manner by which information is presented, or both. Other environmental design elements such as employee uniforms and give-aways (pens, balloons, tote bags). Brands are reinforced by advertising and other marketing activities, and though brand articulation remains consistent, an advertising "message" can change slightly to speak to (or "target") a specific market segment. In nearly every advertisement, brand elements are featured prominently. Maintaining a brand "presence" demands a coordinated investment of capital resources, time, planning, maintenance, and quality control.

Methodology

The methodology for this research is straightforward: to review current marketing, branding, and advertising practices among a cross section of public transit agencies relative to touchpoints in other transportation industry sectors. We recognize the incongruence of cross-transportation mode comparisons, but argue that it is a representative sample of industry-wide practice.

We have designed our investigation of advertising, environmental design, and vehicle livery across four transportation industry sectors. Toward that end, we to some degree “compare apples to oranges”, though the commonalities amongst all sectors—except public transit—are notable. The public transit marketing model is quite different. Public transit—largely due to the inexpert quality of most marketing efforts—is the outlier among sectors of the transportation industry. Our investigation chiefly seeks to uncover—relative to marketing, branding, and advertising—the degree to which public transit has deviated from other sectors of the transportation industry.

Table 1 lists the four key sectors of the transportation industry we investigate and three areas of marketing activity. In the public transit industry, for example, we investigate advertising, livery/environmental, and collateral materials. In the three remaining transportation sectors, we investigate only one marketing activity: livery and environmental design among commercial carriers, livery and environmental design among freight operators, and advertising in the automobile sector.

>> Figure 1. Four Sectors of the Transportation Industry and Marketing Methods

Data for the investigation comes from analysis of advertising, marketing, and branding material across the four sectors of the transportation industry during 2008, 2009, and 2010. In the public transit industry, we use examples of advertising from the American Public Transportation Association's 2009 AdWheel awards, which represents some of the top marketing and advertising efforts for fiscal year 2008. For commercial carriers and freight, we investigate fiscal year 2008 and 2009 brand manuals, corporate communication manuals, and other advertising material given to us by company marketing managers. In the automobile industry, we survey car advertisements in major national publications from January 2008 through April 2010. The time period for this research coincides with a global economic downturn which began in early 2008 and from which recovery began in 2009.

Our survey of marketing, advertising, and branding in each of the four sectors of the transportation industry reveals best practices in each sector and suggests that the weakest marketing, advertising, and branding practices occur in the public transit industry. While we cannot establish causality between marketing, advertising, and branding and outcomes for various transportation organizations across the four sectors, our investigation suggests that for certain companies, brand equity helped pull these companies through a difficult economic downturn. We assume that because such companies are still in business, their brand equity is working “for” them instead of “against” them. However, simply using a brand does not insure success. For example, several transportation organizations closed or failed—suggesting brand bankruptcy—during the period of study: DHL substantially downsized its North American operations in 2009; Northwest Airlines merged with Delta Airlines in 2009; and Saturn (manufactured by General Motors) halted production of new vehicles in 2009.

Advertising Messages for Public Transit

There is a long tradition of advertising in the public transit industry (Walb and Booth 1985). In recent decades, such advertising has focused on increasing ridership, as the relationship between riders, revenues, and greater subsidies has long been established. The goal of most public transit advertising is to persuade *choice riders* (those who own a car but *choose* to ride public transit for some trips) *in lieu* of *transit dependent riders* (those who ride transit because they have no other choice). Additional advertising will not necessarily influence them to ride more (Gensch and Torres 1980; Huey and Everett 1996).

While public transit agencies have, for more than a hundred years, sold space on their system to companies wishing to advertise, this is not the focus of the study. Instead, we focus on public transit systems advertising *their own system* in efforts to increase ridership (Schaller 2004, Silverberg 1998). Such advertising takes place in one of two places: (1) external to the transit system, such as billboard advertising, newspaper advertisements, television commercials, radio advertisements; and (2) internal to the system, in the form of collateral materials (printed matter including maps, brochures, schedules, transit cards and tickets), advertisements on the interior and exterior (bus wraps) of vehicles, at stations and shelters, and within the transit rights-of-way or street rights-of-way.

Data used to investigate public transit agency advertising practices comes from entires for the 2009 Ad Wheel Awards. AdWheel Awards are presented annually by the American Public Transportation Association for excellence in public transportation marketing, advertising, promotion, and communications.

Transportation agencies and consultants to transportation agencies submit materials in four categories: print, electronic media, campaign, and special event. Entries are divided into five groups based on the size and type of the organization. Transit agencies self-nominate for the competition, and the entries represent the "best of the best" brand activity surrounding public transit. We provide the following synthesis of public transit advertising evidenced in the AdWheel Award entries.

Public Transit Provides a Good Value, Especially When Compared to the Price of Auto Fuel

The largest share of advertisements promote cost savings that transit riders stood to realize by riding transit and not driving. Many of the advertisements feature images of stacks of coins and stacks of currency or wallets overstuffed with bills. For example, C-Tran in Vancouver produced a print campaign that emphasized the cost of automobile fuel: “Four Bucks for a Gallon of Gas? GA $P!” (see Figure 2). Similarly, a radio/public service advertisement (O'Keefe and Reid 1990) produced by Jackson Public Transportation featured the phrase, “Got Gas? Didn’t Think So. Spend Less, Save More with Jatran.” Pennsylvania’s Red Rose Transit encourages people to ride public transit for 25¢ per ride during a September promotion and use the money saved for other purchases.

>> Figure 2. GA$P Promotion from C-Tran, Vancouver

The Charleston Area Regional Transportation Authority produced a holiday advertisement promotion and encouraged people to give public transit as a gift: “Wrap Up Their Commute. Drive Less. Save More.” Advertisements are used to combine the cost saving message with an environmental message, such as a promotional campaign by the Monroe County Transit Authority that featured the phrase “Fuel Your Wallet—Dump the Pump—Save the Environment.”

A South Carolina Tri-County Link promotional campaign takes advantage of a federal economic stimulus package: “Talk About a Great Economic Stimulus Package! Unlimited Ride on Weekly or Monthly Passes.” York Region Transit in Ontario, Canada produced a series of print advertisements featuring a dashboard fuel gauge and encouraged people to drive less and ride public transit more and use their cost savings for investments, retirement savings, and vacations.

Advertisements also emphasize the fact that riding public transit is less stressful for commuters than driving; the San Joaquin RTD produced radio advertisements announcing that the bus is convenient, hassle-free, and inexpensive. Similarly, Omnitrans in San Bernardino produced billboards/outdoor advertising featuring the phrase “To Us, Cheap and Easy is a Compliment.” Similarly, the Los Angeles Metropolitan Transportation Authority produced a “Problem—solution” print advertising campaign (see Figure 3) that suggests that riding public transit can help travelers overcome daily headaches—including the high cost of automobile fuel—associated with driving a car.

>> Figure 3. Los Angeles MTA Print Campaign

Public Transit is a Green Alternative.

A small share of print advertisements suggest that public transit is a green alternative to driving. The majority of advertisements show lush, green landscapes, and children. Other advertisements provide “factoids” about the benefits of transit travel over driving, including reduced emissions and improved air quality. Austin’s Capital Metro is featured in a reduce-reuse-recycle print campaign featuring the message “Clean Up Your Act! Show your Love for the Earth” and Mountain Metropolitan Transit Authority in Colorado Springs offered free rides on Earth Day (April 22, 2009) with a poster campaign that features the phrase “Love Your Mother—Ride Free on Earth Day.”

Access to Recreation and Entertainment.

Transit agencies use print advertising to encourage the use of bus and rail to reach college or professional sporting events (Pol, Ponzurick and Rakowski 1986), such as Houston Metro service to Houston Texans games and Seattle’s Metro and Sound Transit to Seattle Seahawks games. Brochures and promotional material are used to show that public transit provides connections to important destinations, such as shopping districts, street fairs, farmer’s markets, arts districts and arts events, and the central business district (such as a “Downtown the Easy Way” campaign undertaken by Portland’s Tri-Met). Similar to early 20th century advertising for the London Underground (Barker and Robbins 1974; Green 2000), transit systems promote their service to recreation, such as a 2009 “Lose the Briefcase—Grab the Beach Bag—Take the Train to Maine” print campaign by the Northern New England Passenger Rail Authority.

”*My” Public Transit System.*

Other advertisements suggest that the reader/resident is an “owner” of the public transit system. This trend is not uncommon among both millennial generation consumers and increasingly among all staunch consumers. Features across the service sector that include "MyAccount" access for utilities and retail, "MyBank" services in the financial services sector, indicate choice and ownership among consumers. For example, Capital Metro in Austin launched a campaign of I-Ride bus wraps featuring the phrase “I Ride to Save Money and My Sanity” and the Rock Island County Metropolitan Mass Transit District produced brochures advertising that “It’s Your Ride—It’s Your Peace of Mind—It’s Your Commute—It’s Your Technology—It’s Your Environment.”

Advertisements for the Transit System.

A small share of advertisement promotes the transit system itself through print and outdoor advertising. Such advertisements promote new or modified service, the acquistion of new vehicles, and fare changes. For example, a transit agency advertised its 25–year anniversary through bus

> wraps. Advertising campaigns are used to promote TransitChek, which allows employees to purchase transit fares using pre-tax earnings.
>
> Promotional campaigns are used to advertise free or inexpensive transit fares for special events, or free or special fares for certain groups of people. Many of the campaigns are aimed at those who are transit dependent—especially children and older adults—because they do not drive (Rosenbloom and Fielding 1998). For example, Pennsylvania's Butler Transit Authority produced a campaign for older adults: "See the Savings Add Up—Stop Throwing Money Away—Start Saving—Seniors 65+ Ride Free, All Day, Everyday!" The Mountain Metropolitan Transit Authority in Colorado Springs produced eye-catching transit cards for youth featuring the message "Summer Haul Pass—Kids Ride all Summer for $20."

We find a number of clever but not fully-articulated ideas in this set of advertisements. Some advertisements are executed better than others, using professional quality photography and typographic treatment. On the whole, however, marketing, advertising, and branding in the public transit industry seems scattershot, uncoordinated, and inconsistent—even among several advertisements from the same transit agency. This inconsistency indicates a lack of planning, the absence of a long-term marketing plan, poorly or unarticulated advertising objectives, and an incomplete or missing branding strategy.

Advertising, Marketing, and Branding Expenditures for Public Transit

We now look beyond the contents of particular advertising efforts to understand broader trends in public transit advertising, especially funding. The American Public Transportation Association identifies over one hundred public transit agencies that are engaged in advertising, marketing, and branding to some degree. However, in sharp contrast, the *Advertising Redbooks* (2010), a database of organizations that have retained professional advertising services, lists far fewer public transit agencies engaged in these activities. This large discrepancy immediately underscores a question of quality with regard to public transit advertisements: nearly 90 percent are designed, disseminated, and placed by professionals outside of marketing and advertising. The high rate of non-professional advertising, marketing, and branding activities among public transit agencies demonstrates a haphazard, reactionary approach rather than a long term strategy of building brand equity.

Some transit agencies retain in-house designers to conceive, develop, and execute marketing, advertising, and branding efforts. These few, typically large agencies—because they do not retain help from professionals external to the transit agency—do not appear in the *Advertising Redbooks.* Very few in-house design departments produce advertising or brand work on par with professional agencies, the Los Angeles MTA Metro Design Studio being the most notable and most successful exception (Walker 2009). Moreover, the agencies that retain professional services are spending—relative to organizations in other transportation sectors—little toward advertising and marketing. *Advertising Redbooks* data also suggests that overwhelmingly, marketing and advertising activities are fractioned, often part of larger public relations and outreach activities, rather than as part of an articulated, long-term marketing plan. Figure 4 shows the ten agencies listed in the *Advertising Redbooks* for fiscal year 2008. Data reported to *Advertising Redbooks* is both proprietary and voluntary (and therefore spotty), but shows that across these ten agencies about $14.6 million is earmarked for advertising and brand development. (*Advertising Redbooks* 2010).

Advertising Redbooks reports ten transit agencies made advertising "buys" in fiscal year 2008. We note that these reports are voluntary (and therefore cannot be viewed as an exhaustive list) and that these data may not accurately represent the fact that other transit agencies did not pay large sums in advertising. However, these data indicate that the advertising firms view the jobs not listed as temporary or transient. Expenditures are reported for less than one-third of agencies reporting to the *Advertising Redbooks*. Revenue data is provided only for one agency, the Greater Cleveland Regional Transit Agency.

However, we were able to compile data from the National Transit Database, to give a more complete snapshot of the agencies activities. While 10 transit agencies report expenditures on advertising in 2008, only four of these transit agencies reveal the value of expenditures (see Figure 4). Our analysis suggests that advertising accounts for between 1 percent and 4 percent of transit agencies' "other expenses" category and only a tiny share of the overall operating budget. Of the agencies reporting types of marketing activity, print advertisements were most common, followed by spot television and radio advertisements. Outdoor advertising followed closely, with various other types of advertising (such as direct mail) placing a distant fourth place.

>> Figure 4. Public Transit Agency Expenditures for Advertising (Fiscal Year 2008)

In contrast to public transit agencies, transportation organizations across other sectors cumulatively spend far more on advertising, marketing, and brand management. Leading companies in each sector of the transportation industry spend significantly more resources than public transit organizations on advertising, marketing, and branding. Figure 5 shows the advertising expenditures for leading automotive companies: General Motors and Chrysler, JetBlue, FedEx, DB and USPS expend similarly. Cumulatively these six companies outspend public transit agencies listed in *Advertising Redbooks* by a ratio of nearly 100:1. Relative to the public transit sector, these companies have a far longer history of brand articulation and advertising strategy, so perhaps a more fair comparison is the value of advertising expenditure relative to overall revenue. According to the *Advertising Redbooks*, on average, public transit agencies spend about 1.3 percent of revenue on marketing, advertising, and branding, whereas transportation providers in other sectors spend on average 15 percent of revenue on the same.

>> Figure 5. Advertising Data for Leading Transportation Companies (Fiscal Year 2008)

A disequity in expenditure between public transit agencies and other industry sectors—automakers, commercial carriers, and freight lines—is often dismissed because the perception is that public transit agencies are fundamentally "different" from other industry sectors. While there may be some truth to this statement, automakers, commercial carriers, and freight lines are for-profit while public transit agencies are not-for-profit; the automakers are commercial corporations based with profit based in sales revenue; public transit agencies are public benefit organizations with measurable outcome for the public good. Despite such differences, public transit agencies and automakers now (perhaps more than ever) share many commonalities and now compete for the same consumers.

Most would agree that the public perception of public transit in the U.S. is quite sore. Marketers might argue that—in general—the public transit "brand" has little brand equity. However, this may be a matter of perspective. Much in the same manner that economic downtime is a prime opportunity for businesses to take stock of operations, the current state of the public transit brand provides an opportunity for reconsideration and retooling of the manner by which public transit is presented to and engaged by the public. In short, the economic climate fueled by various factors and the poor public perception of public transit provides transit managers with an unprecedented opportunity to "reinvent" public transit, making it competitive as the transit mode of choice, rather than a mode of last resort. The leaders of public transportation agencies can look toward other transportation sectors for successful branding strategies.

Comparison 1: Automobile industry.

As the economy worsens and consumers confidence remains unpredictable, the brand equity of major automobile manufacturers is in unprecedented peril. These corporations were once a cornerstone of the American economy; most suffered, however, from substantially decreased sales revenue throughout the economic downturn and consequently increased advertising and marketing efforts to bolster brand equity and capture market. For example, General Motors, once one of the most powerful corporations in the world, enjoyed ever-increasing and resilient brand equity until about 2008 (Advertising Age 2009). Despite internal management and financial troubles, the manufacturing giant continued to market to consumers, even through bankruptcy and eventual rebirth. In contrast, during periods of economic downturn or internal strife, public transit agencies tend not to increase expenditures in advertising or substantially retool marketing efforts.

Corporations such as GM and Chrysler recognize the value of marketing and more precisely recognize the value of carefully controlling the brand message conveyed to consumers (Crain 2006). Positive perception by customers is critical to their survival. Indeed, conventional wisdom has long held that as private entities, large corporations *must* advertise and market their wares to generate income, secure market share, and build brand equity. In contrast, conventional wisdom held that as public entities, transit agencies have very little direct competition, and therefore have little need to advertise or market services. We question this parochial perspective.

In light of the recent U.S. government bailout and substantial taxpayer investment of GM and Chrysler, we further assert that little separates these "private" corporations from long-established "public" entities such as public transit authorities and agencies. GM and Chrysler are—effectively—for the first time in U.S. history quasi-public corporations, financed in part by and "owned" by the federal government entity (Associated Press 2009).

As such the automakers (perhaps now more than ever) share a similar fiscal mandate, government guarantee, and responsibility to taxpayers as do publicly funded transit agencies that have long enjoyed a steady stream government protection and financial subsidy. Without question, fundamental differences in the business models of each exist, but the playing field is perhaps now more level than ever before in the history of the U.S. public transit industry.

Despite this cross-sector competitive dynamic, business practices have changed little among both private and public corporations. Toward this end, we argue that a paradigm shift is underway and that while at one time these entities operated in separate spheres, public transit and private transit options are now more than ever competing for consumers and market share in the same sphere. Our analysis of advertisements by GM, Chrysler reveals the of start of such a paradigmatic shift.

Analysis.

We surveyed the frequency of appearance and message content of automobile advertisements by GM and Chrysler that appeared between January 2008 and April 2010 (corresponding to the time of a corresponding economic downturn, adjusted for publication lag) in five gender neutral, popular, non-proprietary, North American magazines that include advertising: *Time, Newsweek, Vanity Fair, People,* and *National Geographic*. These general-interest publications provide neutral ground for advertisers. Automobile ads in these publications tend to speak to a broad, non-gender specific, audience about an automobile or automobile company, rather than the more specific terms one might find in automobile advertisements in say, *Car and Driver.*

The number of advertisements over a two-year period is consistent, GM advertisements appear at least once each month in weekly issues (*Time, People,* and *Newsweek*), and more than once per issue in monthlies (*Vanity Fair, National Geographic)*. Chrysler advertisements appears less often, but followed a similar pattern, prominently appearing about once per month in the weeklies and at least once per month in the monthlies.

>> Figure 6. Frequency of Advertisements in Key National Publications, 2008–1010

Across the advertisements we examined, the overall marketing message was consistently one of superiority. From the subtle "It speaks for itself" to the blatant "May the best car win" (both Chevy advertisements), the advertising message positions the brand as superior to its rivals. Advertisements feature product features more often than lifestyle issues, though the marketing message and approach varies by company. In nearly 80% of the advertisements examined, GM ad messages feature the automobile and messages about it, whereas Chrysler advertisement messages feature a driver and messages about the driver. This subtle difference squarely positions the brand for each: GM produces superior machines, while Chrysler cares about its drivers. The approach is different, though the fundamental goal of the advertisement is the same: to convince viewers to purchase a new automobile from the "best" company.

Messages in carmaker ads trended closely to the prevailing news stories of the day. For example, as gas prices grew higher and higher throughout 2008 (Google 2010), the marketing messages in carmaker advertisements changed to reflect this. Marketing messages abruptly changed from taglines such as "practical and stylish" to "gas friendly to gas free" as shown in Figure 7. As stories about the environment and global warming increased, so too did marketing messages in carmaker advertisements; an abrupt change from messages about lifestyle luxury and style (such as "lust conquers all") to straightforward pragmatic green messages about fuel and fuel efficiency took hold in weeklies more quickly than in monthlies, magnified in part by increasingly higher automobile fuel prices. This shift, as shown in Figure 8, began in early 2008 and took hold across both weeklies and monthlies by mid 2008. "Gas friendly to gas free" appeared in 27 percent of GM advertising, which gave way in mid-2009 to "The most fuel efficient cross over on the highway" which appeared each week in *Time* and *Newsweek* throughout the summer of 2009. This shift represents a substantial increase in the number of advertising placements by GM in both magazines, a nearly 4-fold increase over the 2-year study period.

Visually, 94 percent of the advertisements studied prominently featured a photograph of a vehicle. Human models appeared in only 7 percent of advertisements, "green" features such as leaves, trees, and rolling lawns appeared more frequently as "green" messages increased, 27 percent of advertisements studied. Oblique references to finances and money appeared frequently. Despite the relatively high occurrence of price and value-conscious messages, visual manifestations featuring a vehicle at center stage while, money —bills or coins—never appeared in any advertisements studied, dollar signs did appear, though very rarely, in only 0.5 percent of advertisements studied.

Overwhelmingly, during the period studied, fuel efficiency topped the list of advertising messages, followed by style and design. Cost/price messages increased significantly toward the end of the study period, from only 4.9 percent in early 2008 to 12.2 percent in early 2010. Again, this trend follows a sharp increase in news stories on dwindling consumer confidence and high rates of unemployment. Safety, a long-touted staple of automobile advertisements took a back seat, appearing in only 3.7 percent of advertisements during the period studied.

>> Figure 7. Advertising Messages Contained in Automobile Advertisements

>> Figure 8. Advertising Message Among Automobile Placements Surveyed Change in Message Over Study Period (timeline)

Comparative Analysis.

A primary difference between private corporations such as GM and Chrysler and public transit agencies is the dollar value of advertising and marketing expended as part of overall revenue. For decades, conventional wisdom has held that transit agencies simply need not (and as a result typically do not) market public transit services. For many transit agencies scare financial resources are not spent on advertising. Conventional wisdom holds that because public transit is largely a monopoly, resources should not be spent on marketing a known service to a captive audience. We argue the opposite.

Economic downturns provide an organization a critical “pause point” for reevaluating operations, redefining long-term plans and goals, studying efficiencies, and indeed for innovation in general. The results of these reflective activities help to redefine objectives and ensure a strong position for the organization as economic conditions improve (Schumpter 2003, Graham and Senge, 1980; Stiglitz 1993). During the “great recession” of 2008 (and continuing to 2010) this is perhaps even more the case: an economic downturn coupled by a coincident heightened awareness of environmental issues, a sharp increase in fuel prices, and an overall change of global *zeitgeist* provides a substantial and timely opportunity for the retooling of the public perception—the brand identity—of public transportation.

Comparison 2: Commercial Carriers and Freight / Delivery Carriers

Commercial airlines, long-distance bus companies, and railways have carefully cultivated brand identities for decades. Most often these brand identities are articulated primarily through vehicle livery and environmental design. A brand is reinforced by its consistent appearance of a logo *in situ* (environmental design, amenities), its use on collateral materials (tickets and schedules, packaging, and uniforms), and its its appearance in advertisements outside of the controlled brand territory. Transportation-oriented brands are most commonly associated with a corporate logo, but a brand is much more than that. A brand identity is empirical and emotionally-driven, chiefly through employee-customer interaction and experience.

Case Analysis: *Jet Blue*

JetBlue has established itself as a market leader in the airline industry, largely through careful cultivation of its brand. Using a signature color (blue), the airline consistently expresses a brand identity for the entire duration of customer experience. The environmental design of the terminal entrance and architectural design of facilities reinforces the brand, as does a whimsical but consistent livery of JetBlue vehicles. Uniforms, customer service areas, and even maintenance and back-office operations are carefully branded. From inside an airplane, customers are gently but constantly reminded of the JetBlue brand; even the inward-facing side of the jet engine provides an opportunity to reinforce brand perception.

>> Figure 9. Jet Blue Brand Identity and Usage Across Media

JetBlue, despite its limited service area consistently ranks among consumers as the top U.S. airline carrier (JD Power, 2009). Customers perceive JetBlue as being a fun, friendly airline. JetBlue succeeds as a result of its branding, advertising and marketing message to customers. The JetBlue marketing message energetically and convivially focuses on in-flight comforts, 24 channels of DirecTV, and industry-leading punctuality, rather than its relatively limited service, self-service check in, and basic terminal accommodations. Brand elements, such as the signature blue color, unite the message and environment (no matter how spartan or self-service) framing it as fun and affordable. Jet Blue delivered its 14th consecutive quarter of profit in 2004 and a 14.1 percent operating margin, among the highest in the industry (Cram, n.d.). Similarly, Virgin Atlantic uses brand-reinforcing methods throughout a traveler's experience and consistently ranks above its peers.

Case Analysis: *Greyhound*

Other transportation-focused organizations also successfully use branding to reinforce a brand identity. Greyhound, following its entry into the UK market, revamped its brand identity in the United States. The Greyhound website heralds "The Future of Bus Travel has Arrived, Well ahead of schedule." The company website is a launch point for the new Greyhound brand identity, marked by a stylized new logo—an upgrade of the highly-recognizable leaping greyhound—new vehicles and livery, and significant upgrades to on-board and in-station amenities. These changes helped to transform the way Grehyound conducts business, "more than an updated paint job, our new buses offer a truly upgraded experience for customers and a new way to sit back and experience the open road" (Wilson 2009). The new brand launch has been successful and more vehicles will be redesigned to incorporate this new brand identity.

>> Figure 10. Greyhound website heralding the arrival of the new Greyhound "logo" and brand identity.

Case Analysis: *Deutsche Bahn*

The German national railway Deutshce Bahn ("die Bahn") brand has graced livery, stations, and collateral materials for decades. Designed by Erick Spiekermann, the now-iconic and highly-recognizable DB logotype and red color adorn trains, stations, adminstrative and back office buildlings and are used consistently in advertisements. The DB brand was updated in 2007 and features a combination of the historic DB symbol and the tagline "DB - Mobility, Networks, Logistics". The brand is consistently applied to vehicle livery and collateral across sectors throughout the DB system: long-distance rail, regional and urban transportation, car sharing, bike rentals, as well as a comprehensive range of mobility, freight, energy, data and service networks. (Schenker 2007)

>> Figure 11. Deutsche Bahn brand identity.

Like JetBlue and Greyhound, the DB brand has become a recognizable icon across Europe and conveys consistency in service and experience.

Case Analysis: USPS

The United States Postal Service—like most national post services—has relied on a consistent brand for decades, a quintessential American color scheme of red, white, and blue and featuring an icon of American independence, the eagle. The brand adorns delivery trucks and post boxes as well as collateral materials used for shipping and mail processing. The brand has been restyled over the years, but has retained its original aesthetic presence. The brand equity of the USPS logo transcends the iconic; it is part and parcel of the American cultural fabric.

The USPS licenses its brand for use on all matter of consumer products, including sneakers, bicycles, and dinnerware. Brand licensing is a big business: in 2007 alone it generated more than $71 billion in retail sales in the United States and Canada (USPS 2010). USPS licensed consumer products bring the brand to new and different retail locations outside a typical post office lobby. Because these products typically bear the brand in ways that are visible when they are being used, they turn consumers into active advocates for the brand. In this manner, the brand not only ensures revenue remains positive, but also that new and ingenious sources of revenue can be explored..

>> Figure 12. USPS brand identity.

Case Analysis: FedEx

The brand identity of FedEx is iconic and recognizable across the world. The arrow "hidden" in the logotype subliminally indicates forward movement and speed. Like USPS, and other commercial carriers, the brand is consistently articulated across media and is effective at various scales. Different colors from a small color palette designate various divisions of the company and the services they offer.

>> Figure 13. FedEx brand identity.

Comparative Analysis.

DB, USPS, FedEx and JetBlue administer brands carefully and control their use so that the brand is a positive visual reinforcement of the user experience. This does not come from simply placing a logo on livery, but from using the logo as reinforcement of an entire positive experience.

Over the last five years, public transit agencies have begun to appropriate small amounts of operating budgets for branding, advertising, and marketing. The number of agencies that have begun a cohesive branding, advertising, or marketing program is relatively small, of the agencies, authorities, or organizations in operation in the United States, only 10 made a “media buy” in fiscal year 2008 (*Advertising Redbooks* 2010). Half that group, only five, retained the services of an advertising agency for assistance in managing the brand, deploying a marketing plan, or purchasing advertising space and/or time. Despite this, nearly 200 agencies are engaged in some kind of marketing, advertising, or branding activity, but have not formally retained professional assistance, guidance, or insight. Typically for all agencies studied, expenditures for marketing, advertising, and branding do not exceed 10% of operating revenue. Automakers, in contrast, appropriate a much more significant amount of operating revenue for branding, marketing, and advertising, at least 10% in fiscal year 2008.

Meanwhile, commercial transportation services like Mega Bus, Go! Bus, and Porter Airlines expanded rapidly as value-conscious North Americans sought out less expensive alternatives for travel. More established transportation services such as Greyhound revamped brand identities and introduced new vehicle designs, livery, and amenities. At the same time, Jet Blue and Southwest Airlines added new routes and increased carrier capacity. Bicycling became a new hobby for many commuters and “complete streets” legislation began to gain acceptance. Public transit agencies, not accustomed to monitoring market shifts, perhaps missed an opportunity to increase ridership and underscore public transportation as a mode of choice, rather than—as many potential riders feel—a mode of last resort. Again, the thinking is that resources—particularly financial resources—are scarce. A return on investment in branding, marketing, and advertising is untested, and spending resources on such activities may not effect a company’s bottom line. However, a few examples of the link between branding, advertising, and marketing public transit and increased ridership can be found. Perhaps the most established example is that of the New York City Subway and its 1966 identity designed by Massimo Vignelli. The now-iconic system is licensed by the MTA and brings a significant amount of revenue for the agency (Haddon 2010, Walker 2009). Recent efforts to create a transit brand by MTA in Los Angeles reveal a direct link between branding and marketing (and more broadly branding) and an increase in ridership (Vincent & Callaghan 2007).

Limitations

We have broadly surveyed marketing, advertising, and branding across various sectors of the transportation industry and across the various media in which these appear, but the analysis by no means captures all advertising and should be considered representative examples. It is difficult, in fact, to compare advertising across sectors, because many characteristics differ: fundamental objectives, modes of travel, funding and revenues, subsidies. For example, an automobile manufacturer is trying to sell a customer a new vehicle, a major investment that car owners make only every few years. In the public transit industry, however, the system and vehicles are already in place, and transit managers are trying to “sell” customer the experience of service and as a result increase the overall number of customers who choose transit.

For our research, we lack data on the influence of marketing, advertising, and branding on behavior change (from purchasing cars or choosing to ride public transit) but we suspect that customers who do not typically chose public transit will be unlikely to try public transit without a better understanding of it. Advertising and branding can help unfamiliar customers to understand how the system works, the level of service to expect, and the benefits of it.

We further recognize the difficultly in obtaining reliable financial data on expenditures related to marketing, advertising, branding. As noted, this information is often proprietary and as no standard rules for reporting this data exist, the variance between agencies is often significant. Similarly, the AdWheel Award entries provide a range of public transit advertisements but are not necessarily representative of all advertisements in the public transit industry. Future studies will aim to draw from additional sources for both financial and brand-based data.

Conclusions

The conclusion of this analysis is straightforward: it is not that public transit agencies must better brand service, produce more advertising, or develop a more cohesive marketing plan. However, it is necessary for public transit agencies to re-envision the manner by which they address the public. While it is true that public transit possesses a monopoly in its sector, transit agencies do not have a monopoly over the choices presented to travelers by competing modes of transportation such as bicycle, private vehicle, or by other methods such as carpooling or ride sharing. The efficacy of advertising is also brought in to question.

Buses provide some of the most prime “moving” real estate in any envionment, especially in a dense urban places. Brand identity can be installed as vehicle livery, and marketing messages can likewise be broadcast on vehicles (Hess and Bitterman 2008). We argue that in an already over-branded world, the visually noisy environment typically needs less branding, rather than more. Public transit, however, is one of very few areas that could substantially benefit from the illusion of branding bolstered by careful advertising and marketing.

Public transit agencies, by and large, were not—relative to the other three major transportation sectors studied—consistently engaged in advertising. Advertising buys during that time were limited to local and the national organizations did not publish any advertisements to promote public transit in the magazines we surveyed from January 2008 through April 2010. This suggests that during the period surveyed public transit agencies did not adequately compete for riders among other non-invasive sectors of competition using advertising or marketing. However, neither were they competing by producing “lifestyle” or other advertisements to build brand identity and brand equity.

Competition need not be direct to have a detrimental impact on public transit ridership. Public transit managers acknowledge that competition comes in many forms; private transportation and individual automobile ownership, the propensity of public transit agencies to offer duplicitous services (e.g., bus, light rail, and paratransit running similar routes), “ecologically-friendly” modes of transportation such as bicycling and walking, and "alternative" transportation arrangements such as ride sharing and carpooling. Each of these modes impacts the perception of public transit and, as a consequence, ridership revenues.

Transit agencies missed a fleeting opportunity in 2008 and 2009 when gas prices were high and most economic indicators appeared like flatline EKGs. Many commuters and drivers—after decades of time behind the wheel—were desperately seeking alternatives. Record-high gas prices spurred “Dump the pump” initiatives. (Pierce Transit, 2009). Cost savings from switching from driving to riding public transit (about $10,000 per year over car ownership) resonated during a period of economic recession, and a historic interest in the environmental sustainability of automobile ownership illustrated an unprecedented confluence of automobile awareness and a re-examination of travel behavior and the costs associated with automobile driving. Some travelers turned to public transit, and indeed ridership surged in 2008—10.7 billion trips, the highest in 52 years (Miller 2009)—and innovative plans for new services and efficiencies came forth. However, despite the economic hardships and the challenges that many American commuters faced, the common perception of public transit in the United States prevailed. The sore perception of pollution-belching buses inching through traffic overshadowed a pronounced and historically unusual demand for alternative transportation.

Positioning public transit to compete with all sectors of the transportation industry is a losing proposition and such an action would not be sustainable. Forcing public transit agencies to compete against private sector services is—in the current climate—unrealistic and also unsustainable. We do not take the position that increasing advertising expenditures and increasing brand equity will cause public transportation to become instantly more attractive to the traveling public. On the contrary, increasing advertising budgets may do more harm than good without a strong brand development plan in place. This research suggests that many public transit agencies are paying good money for poor quality advertising with no long-term branding plan in place. This shortsighted effort has little if any lasting impact and can be considered a waste of scarce resources. Brand equity is built carefully and slowly over time and is a result of careful planning.

However, it is important to note that as state and municipal governments find themselves increasingly cash-strapped, non-traditional transportation options may increasingly be considered as potential revenue streams. The privatization of public transit for example, may—for financial reasons—be considered more seriously now than ever before. This type of move would rewrite the rules for public transit and new best practices would quickly emerge. Agencies may see long-established public financial support rapidly diminish as other more pressing priorities come to the fore for governments, and at the same time see increased demands for high-quality service from riders. In this instance, public transit agencies may be urged (by plan or by circumstance) to explore other streams of financial security, and will likely explore means to increase ridership. Branding may be one such area for exploration. Undoubtedly as the public transit landscape changes, brands will become increasingly more prevalent and necessary. These future brands will likely be based on successful brand efforts already in place along and will likely be heavily influenced by private-sector transportation brand practices. Future public transit brands will follow the lead of successful brands that have either recently emerged such as VIVA (North York) or have been significantly reinvigorated, such as Metro Rapid and Metro Local (Los Angeles). Future brands will likely be more memorable, more carefully articulated, and more successful overall when compared to transit brands of today.

Future research

Next steps in our research include investigating how certain practices in public transit advertising—especially particular campaigns, messages, and advertising modes—can be attributed to ridership changes or other outcomes. This is a challenging undertaking, as ridership is influenced by a number of factors over which transit agencies have no control, and attributing ridership changes to particular marketing efforts is a difficult task. Transit agencies themselves usually do not collect data that allows such relationships to be proven. However, we propose to survey riders and potential riders about stated and revealed behavior changes resulting from particular advertisements and advertising campaigns.

Our future investigations will also compare the cross-mode practices of branding, advertising, and marketing, and will more fully examine the various advertising, marketing, and branding practices within each sector of the transportation industry.

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	Public Transit	Commercial Carriers	Freight	Automobile
Advertising	●			●
Livery/Environmental	●	●	●	
Collateral	●			

Figure 1. Four Sectors of the Transportation Industry and Marketing Methods

Figure 2. GA$P Promotion from C-Tran, Vancouver

Figure 3. Los Angeles MTA Problem/Solution Campaign

Public Transit Agency	2008 Advertising Expenditures ($ US) [1]	2008 Operating Expenses [2]	Advertising Expenditures as Share of Operating Expenses [3]=[1]/[2]	Types of Advertisements
Greater Cleveland Regional Transit Authority (RTA)	●	●	●	●
Metropolitan Atlanta Rapid Transit Authority (MARTA)	●	●	●	●
Central Florida Regional Transport Authority (LYNX)	●	●	●	Consumer Magazines
New York City Metropolitan Transportation Authority (MTA)	$ 5,000,000	($145,841,068)	- 3.4 %	Cable TV, Consumer Magazines, Direct Mail to Consumers, Daily Newspapers, Outdoor , Spot Radio, Spot TV, Weekly Newspapers
Niagara Frontier Transportation Authority (NFTA)	●	●	●	Daily Newspapers, Outdoor, Weekly Newspapers Internet Advertising Spot Radio
Pinellas Suncoast Transit Authority (PSTA)	●	●	●	Cable TV Daily Newspaper Spot TV
(Chicago) Regional Transportation Authority (RTA)	$ 535,000	$123,923,422	0.0%	Network TV Spot Radio
Washington Metropolitan Area Transit Authority (WMATA)	$ 1,600,000	$ 222,109,000	0.6 %	●
Southeastern Pennsylvania Transportation Authority (SEPTA)	$ 1,600,000	$ 44,602,579	3.7 %	Direct Mail, Spot Radio, Coop Advertising, Spot TV, Special Events Marketing, Cable TV, Yellow Pagtes, Daily Newspaper, Multimedia, Outdoor, Weekly Newspaper, Exhibits/Trade Shows POP, Premiums/Novelties
Los Angeles County Metropolitan Transportation Authority (MTA)	●	●	●	Catalogs, Outdoor Daily Newspaper, Multimedia Weekly Newspaper, Internet

Figure 4. Public Transit Agency Expenditures for Advertising (Fiscal Year 2008)

● = no data reported to *Redbooks*

Source: *Advertising Redbooks* (2010) and National Transit Database (2008)

Notes: Column [1] source is *Advertising Redbooks* (2010). Column [2] source is National Transit Database (2008). The National Transit Database subdivides a transit agency's operating expenses into four categories: (a) salaries, wages, and benefits; (b) materials and supplies; (c) purchased transportation; and (d) other operating expenses. We assume list the value for (d) other operating expenses in Column [2].

	Agencies	Types of Marketing and Advertising Activities	
General Motors **Marketing Expenditures** $5,500,000,000 **Revenue** $148,979,000,000	28	Business Publications Exhibits/Trade Shows Outdoor (Posters, Transit) Foreign Cable Television Co-op Advertising Point of Purchase	Internet Advertising Special Events Marketing Consumer Magazines Network Radio Spot Radio Daily Newspapers Network Television Spot Television
Chrysler Group LLC **Marketing Expenditures** $960,000,000* **Revenue** $62,200,000,000	13	Cable Television Multimedia Consumer Magazines Network Radio Daily Newspapers	Internet Advertising Network Television Outdoor Spot Television Spot Radio

Figure 5. Advertising Data for Leading Transportation Companies (Fiscal Year 2008)

Source: *Advertising Redbooks* (2010), *Advertising Age (2009)

Magazine	Total Number of GM Advertisements	Total Number of Chrysler Advertisements
Weeklies		
Time	17	8
Newsweek	5	8
People	20	3
Monthlies		
Vanity Fair	24	4
National Geographic	5	1
	n = 71	n = 24

Examples

Figure 6. Frequency and Examples of Advertisements in Key National Publications, 2008–2010

Notes: The count represents the total number of advertisements. The same advertisement may be counted more than once.

Key Message in Advertisement	Number of Advertisements	Share of Total
Fuel Efficiency	62	32.8 %
Style / Design (includes “all new”)	42	22.2 %
Size	21	11.1 %
Quality	14	7.4 %
Luxury	19	10.1 %
Cost / Pricing	23	12.2 %
Adventure / Lifestyle	11	5.8 %
Safety	7	3.7 %
Total	199	100.0%

Figure 7. Advertising Messages Contained in Automobile Advertisements

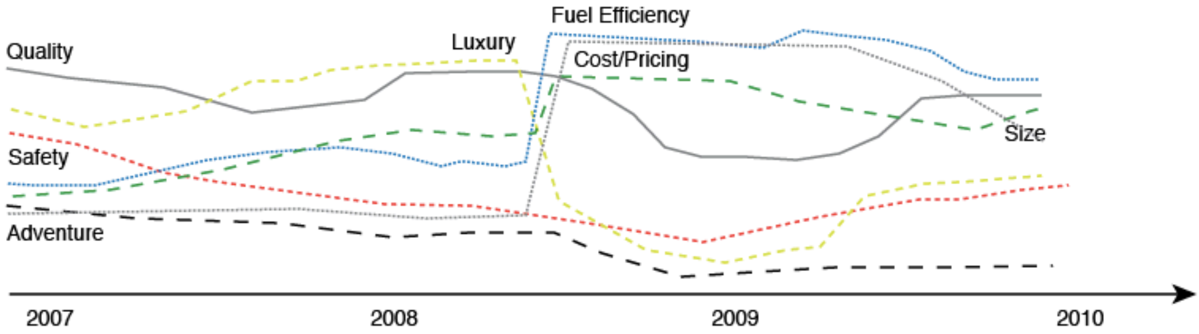

Figure 8. Advertising Frequency Message Among Automobile Placements Surveyed: Change in Message Over Study Period (timeline)

Figure 9. Jet Blue Brand Identity and Usage Across Media

Source: JetBlue

Figure 10. Greyhound Website Heralding Arrival of New Greyhound "Logo" and Brand Identity.

Source: Greyhound

Figure 11. Deutsche Bahn Brand Identity.

Source: Deutshce Bahn

Figure 12. USPS Brand Identity.

Source: United States Postal Service

Figure 13. FedEx Brand Identity.

Source: FedEx