Bus Service Improvement Plans

Solent Annex

October 2022

This document outlines the situation, plans for and progress towards shared improvements to aspects of bus and public transport within the Solent region, including multi-operator ticketing and trials of new mobility apps. It has been produced by Solent Transport, on behalf of the four Local Transport Authorities, for inclusion within their respective Bus Service Improvement Plans, ensuring clarity and consistency between the partners and in turn for local residents.

1. Introduction and overview of the Solent sub-region

Whilst this BSIP is focused on a single Local Authority area, as explained elsewhere in this BSIP xxxx Council is a part of the wider Solent sub-region. The Solent sub-region comprises Portsmouth, Southampton, the Isle of Wight and the southern parts of Hampshire including the wider "city regions" around Portsmouth and Southampton, the area between the cities, Winchester, and the Waterside area of the New Forest and Winchester.

Figure 1 indicates the approximate extent of the Solent sub-region although the boundaries used to define the Solent sub-region are variable, with different organisations such as Solent Local Enterprise Partnership (LEP), Partnership for South Hampshire (PfSH) and Solent Transport defining different boundaries.

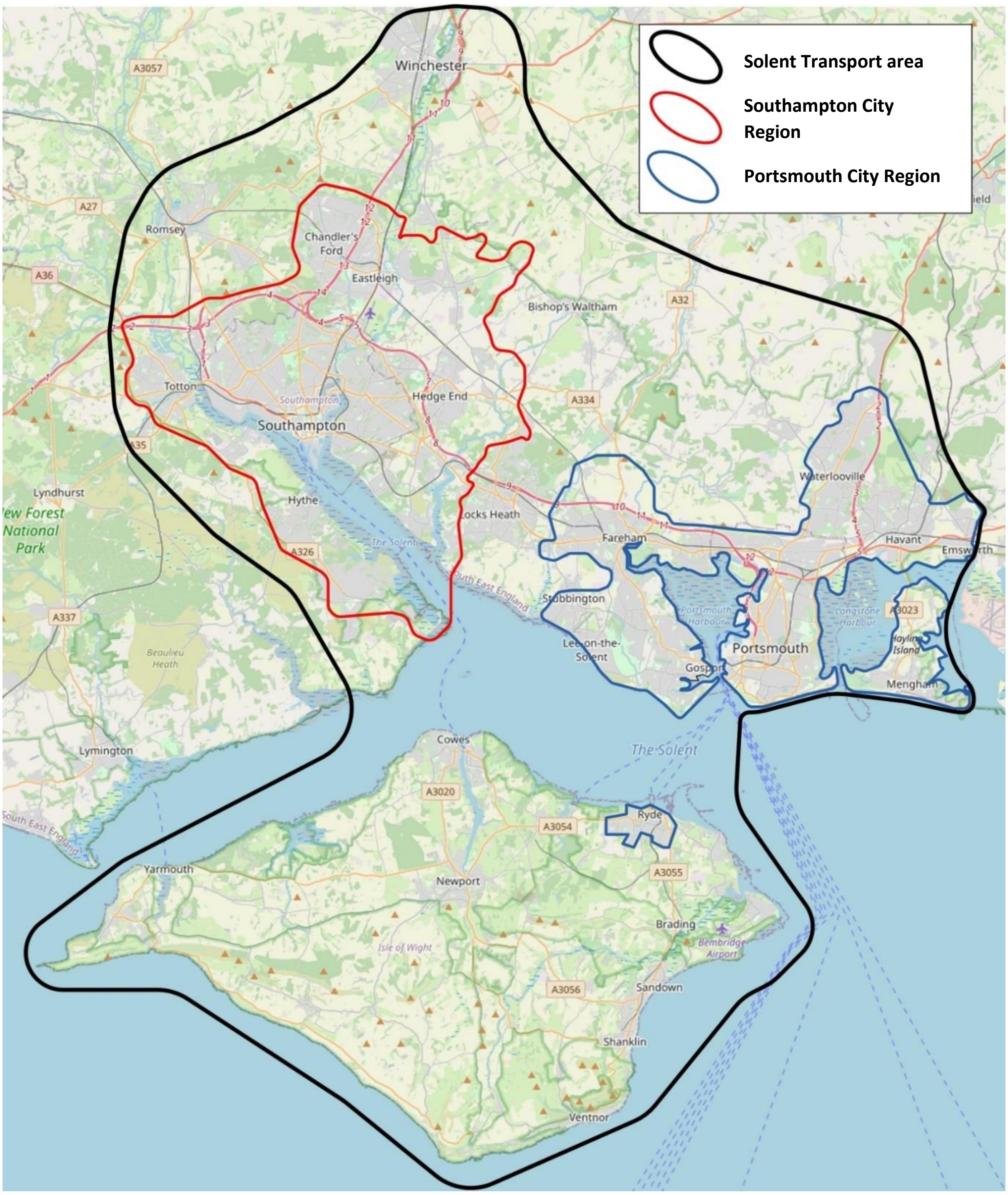

Figure 1- Solent sub-region and city region boundaries

The population of the overall Solent sub-region is approximately 1.2 to 1.4 million (1.25 million population within the Solent LEP area - although this excludes Winchester and includes parts of the New Forest outside the "Solent" definition shown in the map above). The core (and most heavily urbanised) area of Solent (the cities of Portsmouth and Southampton and adjoining settlements/suburbs including Fareham, Gosport, and Eastleigh) have been defined by Office for National Statistics as a single, contiguous Built Up Area. In 2011, South Hampshire was the sixth largest built-up area in England with a population of 855,569.

The Solent sub-region is a distinct functional economic area and has a high level of travel self-containment: in 2011, 86% of people residing in one of the Solent's eleven constituent districts also had their workplace in one of these districts. However the pattern of movement and travel demand within the Solent sub-region is complex. Solent is a relatively polycentric area, with 40% of residents working in a different district to where they live.

Solent Transport represents 20% of the population Transport for the South East Area. Intra-Solent commuting is the largest intra-urban travel market in the Transport for the South East (TFSE) region by a large margin[1] as indicated in Figure 2 below. By extension, there is a large (actual, and potential) market for bus travel for intra-Solent journeys.

Figure 2: Internal travel flows in key urban areas in TFSE area

The patterns of interaction and travel demand within the Solent sub-region have been changing over the last few decades, driven primarily by development of the motorway network which allowed development and urbanisation of more outlying areas away from the two major cities. Between 1981 and 2017, more than twice as many new homes were built outside the two main cities as were built within them. There has also been a considerable decentralisation of employment, with some key employers moving from city centre locations to locations which are well-connected by the Strategic Road Network. There have also been significant changes in the key sectors within the area's economy.

[1] FINAL-Economic-Connectivity-Review.pdf (transportforthesoutheast.org.uk)

These trends were extensively analysed by Solent LEP in their 2016 Strategic Transport Investment Plan[2]. A key trend is reducing self-containment (fewer people living and working in the same place). Between 2001 and 2011 the degree of self-containment fell in Portsmouth from 73% to 65%, and from 66% to 56% in Southampton.

Other areas of the Solent LEP feature relatively low levels of self-containment - such as Fareham (36%), Eastleigh (37%), Gosport (39%) or Havant (42%). These areas are net exporters of labour to other towns and cities across the Solent area. Solent LEP's analysis showed that Fareham, Gosport and Havant are supporting Portsmouth's job market with respectively 17%, 18% and 24% of their residents working in Portsmouth; and Eastleigh is feeding Southampton's job market with 20% of its residents working in Southampton.

Therefore there are very substantial amounts of travel demand crossing the Local Authority boundaries in the Solent area- analysis by TfSE[3] identified that out of seven travel to work flows of more than 6,000 people per day in the entire TFSE area, three of these flows are within Solent (Eastleigh to Southampton and vice versa; and Portsmouth to Havant). As indicated in Figure 3 below, there are numerous other significant travel flows within the Solent / South Hampshire region - although notably there is relatively limited interaction between the mainland and the Isle of Wight, despite the island's proximity and reliance on Portsmouth and Southampton for some functions/activities/services. This reflects the significant time and cost barriers that exist to crossing the Solent and means that the Isle of Wight, although adjacent to the cities, is significantly less integrated with them than would be expected.

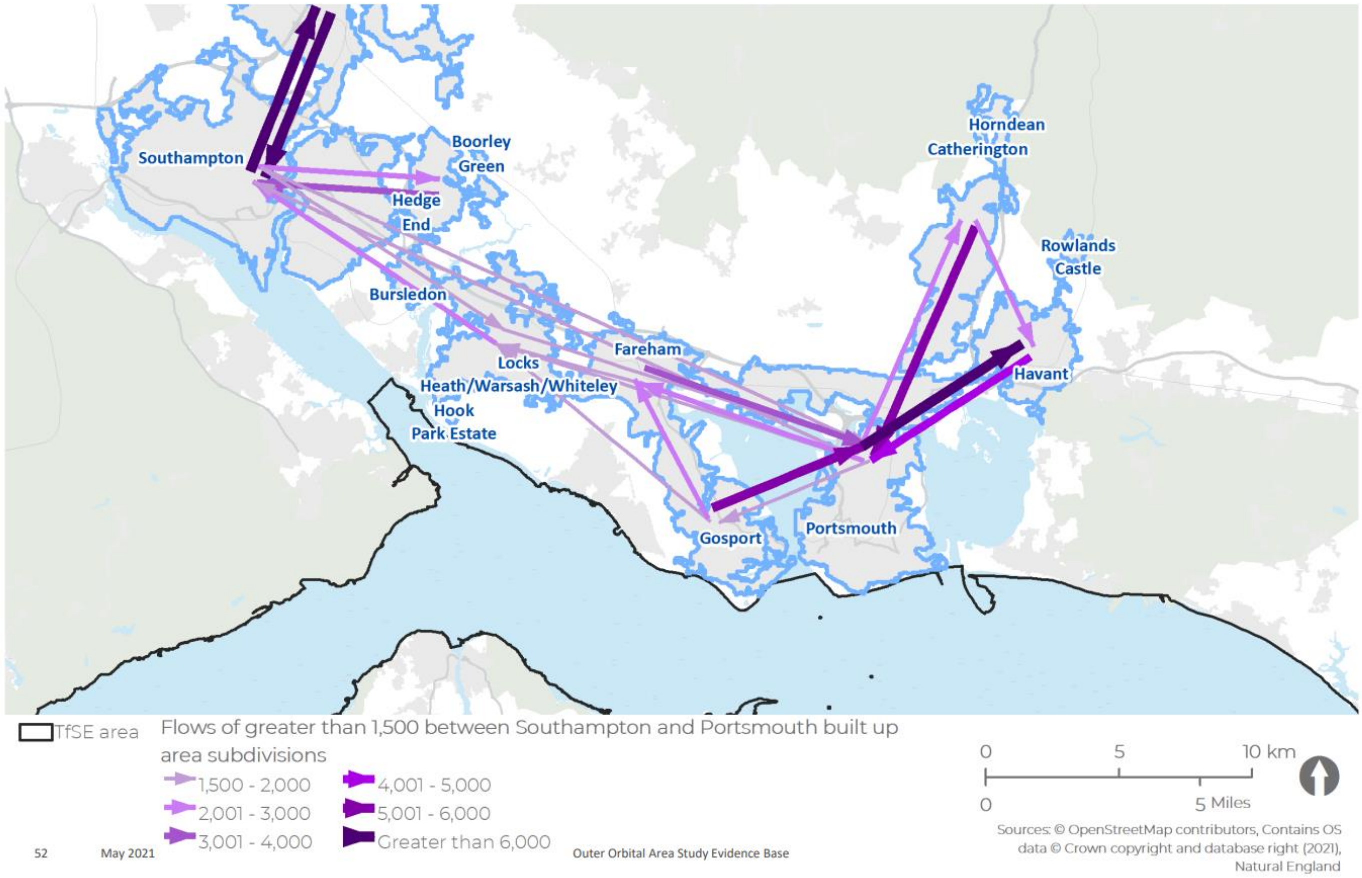

Figure 3: Key travel flows within the South Hampshire built Up Area (2011 Census)

In summary this evidence demonstrates the significant and complex integration of economic and functional activity in the Solent sub-region across Local Authority boundaries.

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2 tip-final-web-version.pdf (solentlep.org.uk)

3 TfSE_AS_OO_EvidenceBase_FINAL.pdf

A consequence of the area's economic and travel demand structure is that as well as there being a significant degree of fragmentation of the bus market (seven main "brands" across three primary operating groups) there are a significant number of cross-boundary bus services. Analysis of bus service data in Solent Transport's Sub-Regional Transport Model (SRTM) model found that pre-Covid, out of 472 scheduled bus journeys operating in the AM peak hour across the sub-region, 152 of these services cross an LTA boundary (32%). If services on the Isle of Wight and Park & Ride services are excluded, the proportion of bus services in Solent which are cross-boundary rises to 36%. One route, the First X4, links Portsmouth to Southampton - and therefore crosses two LTA boundaries and serves three LTAs. Notably, every ferry service in the area crosses an LTA boundary and some ferry services – particularly the Gosport - Portsmouth ferry and services between Portsmouth and Ryde- operate at frequencies, carry passenger numbers and are functionally comparable to urban bus or rail services.

The role of Solent Transport

Solent Transport is a Partnership and Joint Committee consisting of Hampshire County Council, Isle of Wight Council, Portsmouth City Council and Southampton City Council. Solent Transport was established in 2007 and has a variety of functions and objectives including:

- To support/ deliver strategic transport planning activities across all four Member authorities, to help ensure transport plans and strategies respond to the complex patterns of travel demand and frequent non-alignment of this demand with LTA boundaries
- To develop business cases and bids, hold funding, and deliver projects, services and other activities collectively on behalf of its Member Authorities for projects where collective delivery is beneficial to the Member LTAs- such as marketing/promotion campaigns, operation of the Sub-Regional Transport Model, and funding and participation in management and development of Solent Go (see below)
- Undertaking lobbying and profile-raising activities and representing collecting interests of the partners in interactions with funders and external stakeholders and partners
- Supporting collaboration and communication between Member authorities.

Solent Transport has several levels of governance in place through which collective decision-making and delivery is undertaken:

- A Joint Committee, comprising the Cabinet Member with responsibility for Transport from each LTA
- A Senior Management Board, comprising the Heads of Transport services (or equivalents) and their deputies from each LTA
- Project and programme level boards and working groups for individual projects, programmes and other areas of work.

Through a team of several dedicated staff working jointly with staff at the four Solent LTAs, Solent Transport leads the delivery of several activities and projects relevant to BSIPs in the Solent area as outlined in the following sections. The four LTAs have also identified some pan-Solent area measures which are relevant to all four BSIPs.

2. Current initiatives relevant to BSIPs *("what we are doing now?")*

2.1 Solent Go

Solent Go is a range of multi-operator public transport tickets/ fare products available in the Solent sub-region. A precursor to Solent Go, named Solent Travelcard, was launched in 2004 offering a paper ticket coving a single Solent region zone including all of Portsmouth and Southampton, and the southern parts of Hampshire between and around the cities.

With funding from the Local Sustainable Transport Fund (LSTF) between 2011 and 2015, the Solent Travelcard initiative was expanded to offer smart card ticketing, additional travel zones and product durations, and inclusion of several ferry operators, and was rebranded as "Solent Go".

2.1.1 Product range, pricing etc

Solent Go products are available covering Portsmouth and Southampton City Zones, and a wider Solent Region Zone. The zone boundaries are shown in Figure 4.

Figure 4: Solent Go ticket zones

Bus products can be used on all operator's buses within the zone it is valid, with the exception of Southampton Mini Link who do not currently participate in the scheme (discussions regarding Southampton Mini Link participation have been held).

Ferry products can be used only on ferries operated by Gosport Ferry or Hythe Ferry. Ferry products were previously available on cross-Solent passenger routes operated by Hovertravel, Red Funnel and Wightlink but were withdrawn in 2018 due to low use.

Tickets can be purchased/ used via several media/ fulfilment options:

- As paper tickets, bought from the driver on the bus
- Via ITSO smartcards – products can be purchased online via the Solent Go website[4] and loaded to cards via on-bus card readers and also via card readers at the Gosport and Hythe ferry terminals; additionally a Solent Go Android smartphone app allows Android smartphones equipped with NFC to be used to load products to a smartcard. Tickets can also be purchased and added to smartcards at participating bus company travel offices. Smartcards can be ordered online.
- Via bus operator's own smartphone apps (FirstBus, Bluestar and Stagecoach)

Not all tickets are available via all ticketing methods. Some tickets are only available as smartcard products.

The table overleaf outlines products, pricing and ticket media/ fulfilment methods for each existing Solent Go products.

[4] Solent Go travelcard - It's now easier to travel from A to B to Sea! | Solent Go

				Ticketing methods		
Product family	**Zone**	**Duration**	**Price**	**Paper**	**Smartcard**	**Bus Operators' own mobile apps**
Bus tickets	Solent Region Zone	1 day	£8	Y	Y	Y
		5 non-consecutive days (Carnet)	£39	N	Y	Y(1)
		7 consecutive days (weekly)	£30	Y	Y	Y
		28 consecutive days (monthly)	£100	N	Y	Y (2)
		13 consecutive weeks (quarterly)	£280	N	Y	N
	Southampton City Zone	1 day	£5	Y	Y	Y
		5 non-consecutive days (Carnet)	£22.50	N	Y	Y(1)
		7 consecutive days (weekly)	£20	Y	Y	Y
		28 consecutive days (monthly)	£65	N	Y	Y(2)
		13 consecutive weeks (quarterly)	£185	N	Y	N
	Portsmouth City Zone	1 day	£5	Y	Y	Y
		5 non-consecutive days (Carnet)	£22.50	N	Y	Y(1)
		7 consecutive days (weekly)	£20	Y	Y	Y
		28 consecutive days (monthly)	£65	N	Y	N
		13 consecutive weeks (quarterly)	£185	N	Y	N
Ferry products	Gosport Ferry	2 Trip carnet	£4.30	N	Y	N
		14 Trip carnet	£26.40	N	Y	N
		56 Trip carnet	£104	N	Y	N
	Hythe Ferry	2 Trip carnet	£8	N	Y	N
		14 Trip carnet	£44	N	Y	N
		56 Trip carnet	£157	N	Y	N

(1) Carnet tickets not available via the Stagecoach app at present

(2) Southampton City and Solent Region Zones 28 day products M-tickets only available via Bluestar/Unilink app

2.1.2 Governance and implementation

Solent Go's governance is led jointly by South Hampshire Bus Operators Association (SHBOA- a trade body consisting of representatives of all the bus operators in the area and a representative of the CPT) and by Solent Transport. Solent Go management board meetings are attended by representatives of SHBOA, the bus operating groups, and the Solent LTAs.

Whilst the management and implementation of Solent Go is collaborative, pricing is set/ agreed by the operators. Solent Go products are typically priced at a small premium to comparable single-operator products. The SHBOA operators have followed a policy of restraining SolentGo price increases since 2014 which means that the price premium between Solent Go and some of the most expensive single operator products has gradually reduced. The operators also follow a policy of not allowing any Solent Go products to undercut equivalent single operator products. This means that operators may seek to raise Solent Go fares in the near future in order to maintain headroom for price rises on their own products.

Solent Go's back office systems are operated by Southampton City Council's Smartcities team on behalf of Solent Transport and the Solent Go partners. SCC operate an ITSO smart card system for Itchen Bridge tolls, libraries ENCTS bus passes and several other services, to which the Solent Go service is an "add on" to this wider service contract. The cost of operating the Solent Go back office and providing customer support was around £27,000 in 2020/21. This cost is funded from Solent Transport's budgets which are primarily funded by the four Member LTAs.

Revenue from on-bus and M-Ticket sales is retained by the operator making the sale. Revenue from Smartcard sales is distributed across participating operators according to a formula based on estimated use and market share, minus a small administration fee and a retention sum charged by SCC Smartcities.

2.1.3 Usage and role of Solent Go tickets

The launch of Solent Go was accompanied by significant marketing and promotion efforts, however in recent years marketing and promotion for Solent Go has been lower key, being restricted to several modestly-sized marketing campaigns in recent years - largely as a result of limited budgets. Bus operators provide information on their websites about Solent Go but this is often not given a high profile.

Consequently, awareness of the Solent Go product range is currently relatively low: research undertaken by Southampton City Council in 2019 found that 19% of a panel of 681 residents were aware of Solent Go but 81% were not. Amongst regular public transport users, awareness was somewhat higher, at 28%.

This low awareness and limited promotion, together with "premium" pricing compared to single operators products, translates to low usage levels. Only 1% of the SCC panel were current users of Solent go products and only 4% had ever used Solent go products.

Total sales of Solent Go paper and Smartcard products (all product zones and durations) are shown in the table below. Nb these figures exclude m-ticket sales from operators own apps.

Year	Solent Region Zone	Portsmouth City Zone	Southampton City Zone	Total
2017/18	8898	238	166	9302
2018/19	9851	698	468	11017
2019/20	10715	1186	751	12652
2020/21	4746	633	361	5740
2021/22	6873	1136	125	8134

Prior to the covid-19 pandemic there was a gradual upward trend in Solent go ticket sales, possibly as a result of gradual reductions in the price gap between operator's own products and Solent Go products as fares were raised by operators for their own products whilst Solent Go prices remained fixed. The higher sales of the Portsmouth City Zone product may be a consequence of the higher average pricing of bus fares in Portsmouth compared to Southampton.

Pre -Covid, there were around 3,000 active cards on the Solent Go Card Management System and there were an unknown number of additional cards in use but not registered in the CMS.

Translating ticket sales into journeys is complex and requires estimation; in 2019/20 it was estimated that around 144,000 journeys were made using Solent Go tickets. This represents a very small fraction (less than 1%) of the overall number of bus journeys in Solent.

Solent Go sales were heavily impacted by Covid-19 (reducing by as much as 80% in some months during 2020/21) but overall sales for the 21/22 year had recovered to 64% of the 2019 sales figure (and 87% of the 2017/18 figures).

It has been noted that the level of smart card activity has not recovered as strongly as the level of paper ticket/ mticket sales at present.

The primary conclusion is that at present Solent Go is essentially a niche product albeit one that fulfils a useful function (seamless integration across operators via a single ticket) albeit at a price premium, and has governance, implementation and other arrangements in place which could be built upon in future.

2.2 Solent Future Transport Zone (FTZ) programme

Future Transport Zones are a trial programme funded by the Department for Transport (DfT) to test ways of making journeys easier, smarter and greener in future.

The Solent Future Transport Zone programme[5], led by Solent Transport, has been awarded £28.8m from the DfT to run numerous tests and trials of innovative approaches to transport across the Solent region. As these tests and trials take place, research, monitoring and evaluation is being undertaken to understand the benefits and impacts of the schemes being trialled.

In addition to a range of objectives relating to trialling of emerging mobility options and digital technologies set by DfT (the main funder) the Solent FTZ programme also supports efforts to address a range of local issues including:

- Offering better alternatives to the high level of car dependency in the Solent sub-region;
- Making better use of the public transport network which exists and complimenting the £170m of capital investment in public transport, active travel, public realm and other infrastructure, and complimentary improvements to bus services, being delivered by partners involved in the Southampton and Portsmouth Transforming Cities Fund programmes; and
- Supporting efforts to improve local air quality - areas in Portsmouth, Southampton and Fareham are subject to Air Quality Management (as at 2017), particularly for exceedances in NO2.

The Solent FTZ programme commenced in summer 2020 and will run until summer 2024. Its constituent projects are summarised in Figure 5.

[5] Solent Future Transport Zone – Solent Transport (solent-transport.com)

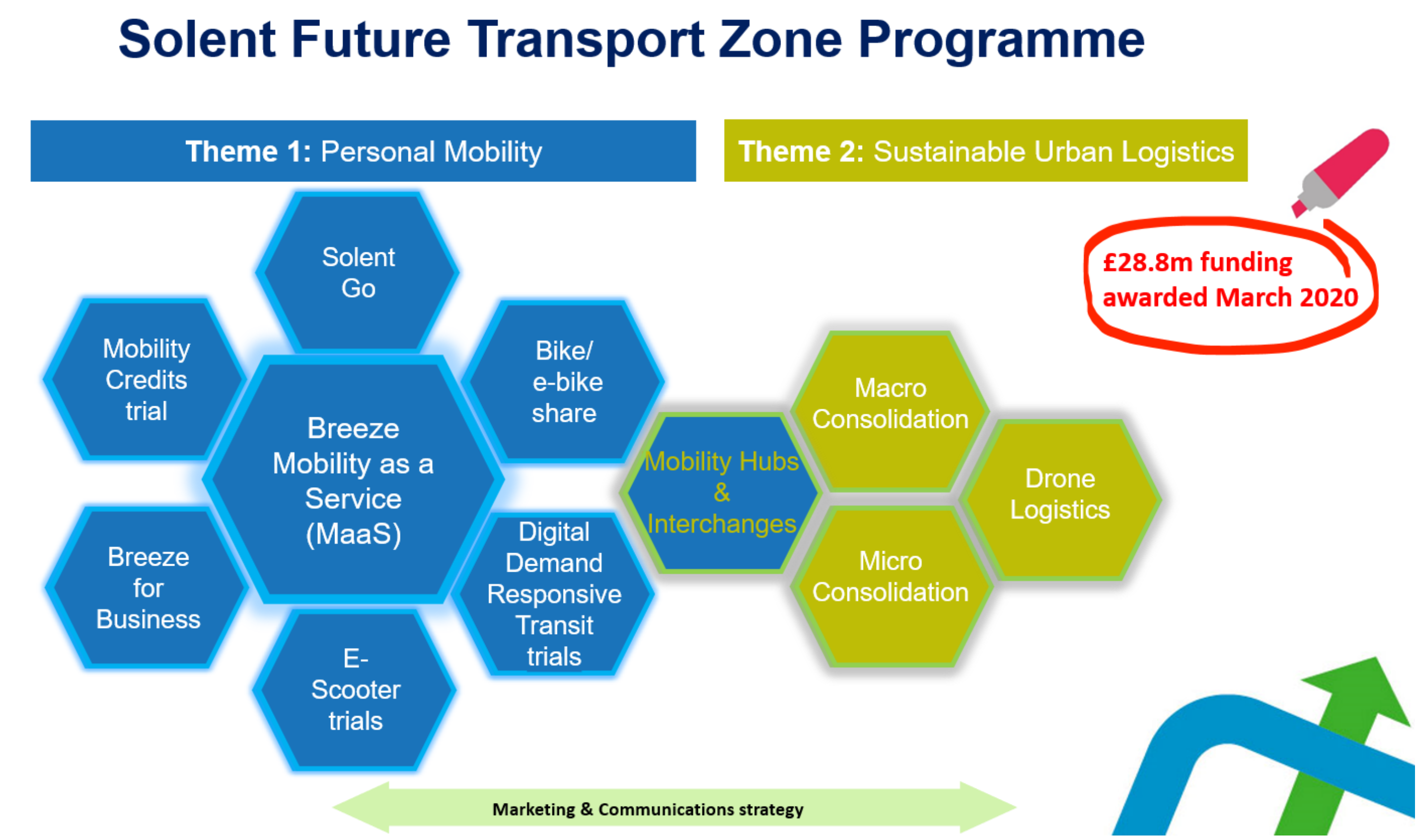


Figure 5- Solent FTZ programme overview

Several of the projects in the FTZ programme are directly relevant to this Bus Service Improvement Plan, most notably:

- Breeze Mobility as a Service (MaaS) trial: This project is trialling Breeze, the UK's first multi-city Mobility as a Service app – allowing journey planning, ticketing and payment via a single app for the majority of transport modes across the Solent area. Following extensive development work during 2021 and 2022, the initial version of Breeze, mainly focused on micromobility launched to the public on 3rd October 2022. A fully operational app including rail and all busses in the region, will go live in January 2023.
- Solent Go enhancements: development of new Solent Go multi-operator ticketing products - the first of which (Carnets) was introduced in 2021- and retailing Solent Go tickets via Breeze
- DDRT trial: This project will launch the first Digital/Dynamic Demand Responsive Transit services in the Solent area, and will integrate these services into the Breeze MaaS app. Procurement of a back office system provider was well underway as of October 2022 with on-street launch of trials scheduled for 2023.
- Marketing & communications: A significant Marcomms effort will be resourced/ delivered via the FTZ programme to maximise awareness and uptake of the new travel options being trialled, with a particular emphasis on linking to/ leveraging travel behaviour change opportunities. Some Marcomms activity has already been undertaken, including
  - A "return to the office" campaign in 2021
  - Activities to support the launch of e-scooter trials (2020/21); Bike/ e-Bike share (2022); and launch of Breeze (2022)
  - Launch of Breeze website and ongoing organic social media content to improve Breeze brand awareness

Other FTZ projects are also relevant to bus users and promotion/ development of bus use, in particular:

- Bike/ e-Bike share and E-scooter trials: These trials have launched networks of shared bikes, e-bikes and e-scooters on the Isle of Wight, Portsmouth and Southampton, starting in 2020 and with roll-out continuing to 2023. Around 2,200 bikes, e-bikes and e-scooters are available from around 300 docks/ parking stations in most of the urbanised areas of the three trial zones. These offer new opportunities for first/ last mile connections to bus and rail services (with parking/docks at most key interchanges and major stops) as well as providing a new non-car travel option which may indirectly support increased use of bus services.

- Breeze for Business: this trial will promote and incentivise use of the Breeze app in major workplaces around the Solent area to help drive uptake of travel options available via Breeze- including bus- to commuters.
- Mobility credits trial: this trial will undertake research on the effect on travel choices of provision of mobility credits via the Breeze app to low-earners in several small trial zones in targeted areas within the Solent area.

3. Currently Committed actions *("What are we committed to doing?")*

3.1 Breeze MaaS app

The flagship/ core project for the Solent FTZ programme is the trialling of a Mobility as a Service (MaaS) app for the Solent sub-region. Most other projects within the FTZ programme link to or in some cases are reliant upon this project.

This project is delivering a "super app" and back office system and associated commercial arrangements which can offer journey planning, payment and ticketing across numerous modes of travel and service providers via a single app and a single user account – effectively allowing users to compare all relevant mobility options for their journey in a single app, rather than requiring complex comparisons and evaluation across apps and information provided by multiple operators.

Figure 6 provides an overview of the Breeze app elements and capabilities.

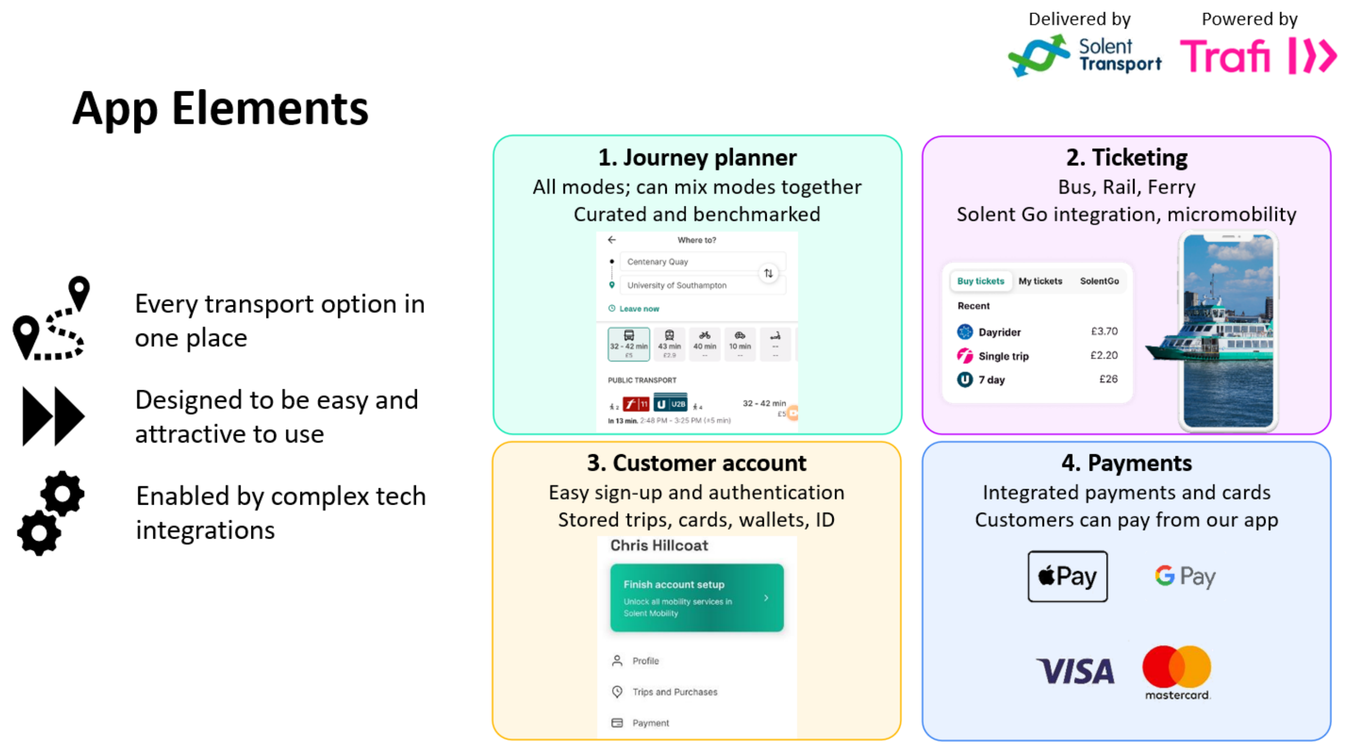


Figure 6: Breeze key elements

Breeze will offer a means for any transport service provider to retail their digital products via the app, and can package together ticketing products that Mobility Service Providers (MSPs) have made available via the platform to users to best match their journey plans and preferences.

Solent Transport has engagement from all key Mobility Service Providers (MSPs) in the Solent area including all bus operators to participate in the Breeze trial, and is seeking that MSPs offer all products at the same cost as if the user purchased these directly. Where possible transactions will be wholly completed within the Breeze app with no hand-off to external apps (Level 2 ticketing integration) and via a single user account (Level 3) to provide an optimal user experience.

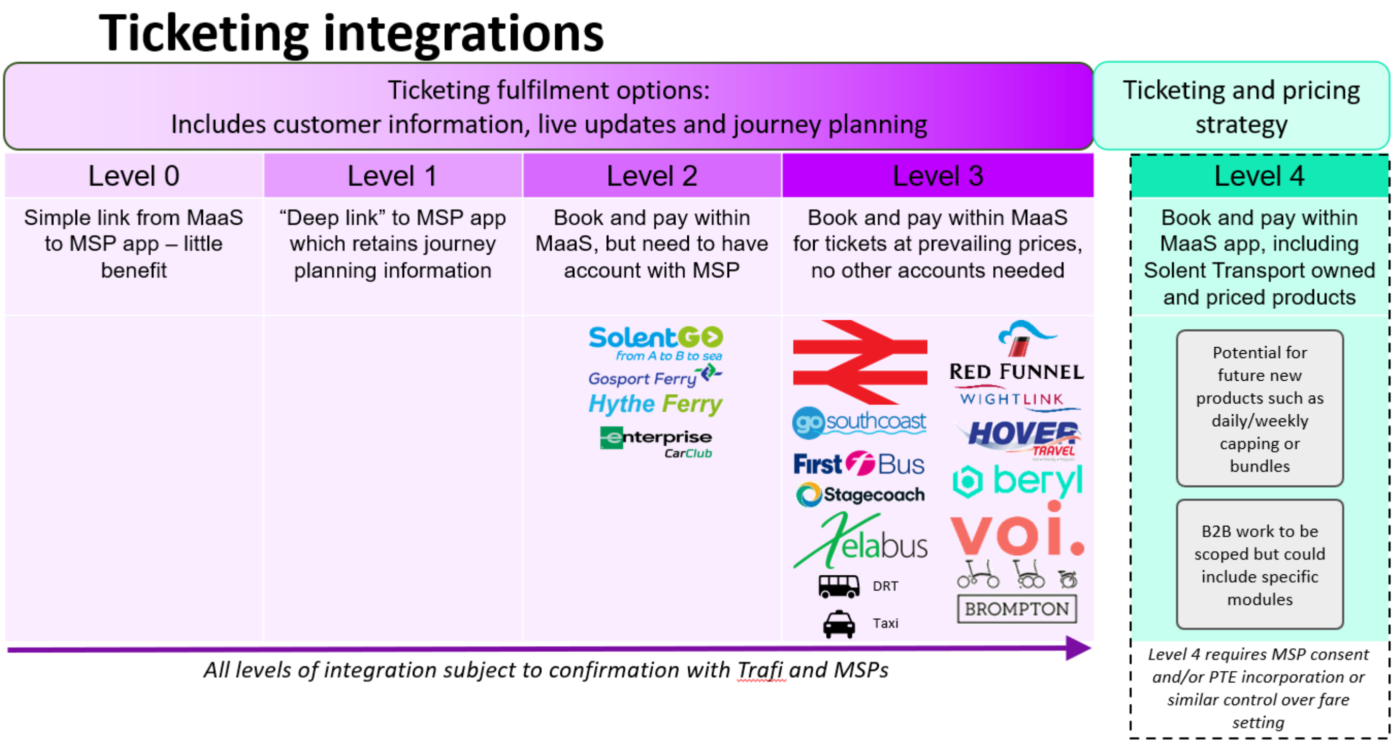
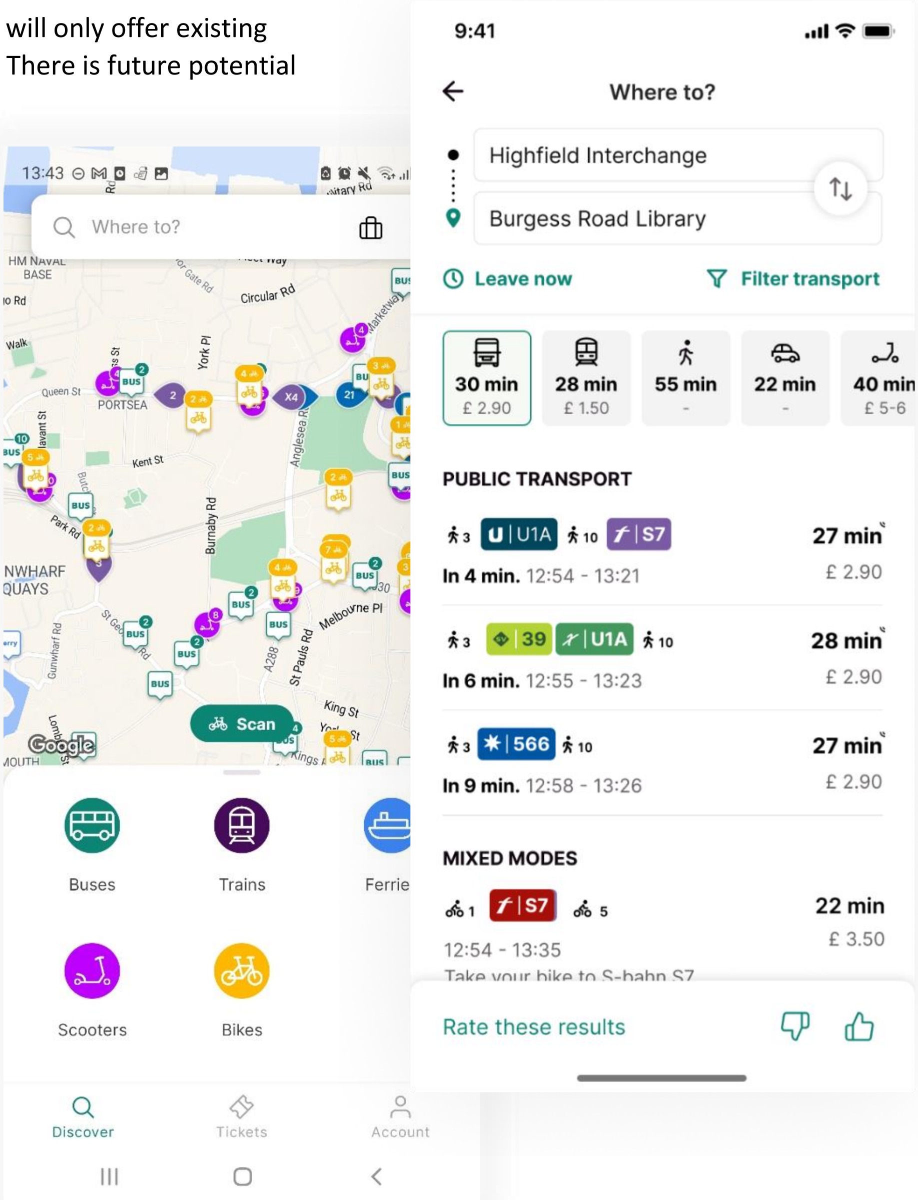


Figure 7: Breeze MSP/ ticketing integration capabilities



It should be noted that in this trial, Breeze will only offer existing travel products /tickets created by MSPs. There is future potential to use the Breeze back office system to create entirely new travel products, for example daily/ weekly capping or bundles – but this would require additional development and new commercial arrangements/ approaches in partnership between Solent Transport, MSPs, and LTAs. This could include use of Breeze as a means of retailing new products to be introduced via Portsmouth City Council's BSIP programme.

Therefore Breeze will be able to offer users the best available combination of existing transport services and fare products to meet user's needs and will improve integration between modes. However if the available transport services or fares are unattractive or cannot meet the user's needs (eg no service exists at the right time/place/ price for the user) this is not a challenge which Breeze alone can overcome.

A large and complex range of relationships and governance with over 30 partners, MSPs, and other third parties and stakeholders has been established to implement Breeze.

3.1.2 Implementation arrangements

The prime contractor for the Breeze system is a consortium of Trafi and Unicard, working under contract to Portsmouth City Council. Solent Transport's FTZ team are directly managing this contract as well as leading on the creation of the numerous required commercial and administrative arrangements both internal to Solent's LTAs, and with external providers. The overview project plan for Breeze is shown in Figure 9.

Breeze Project Plan

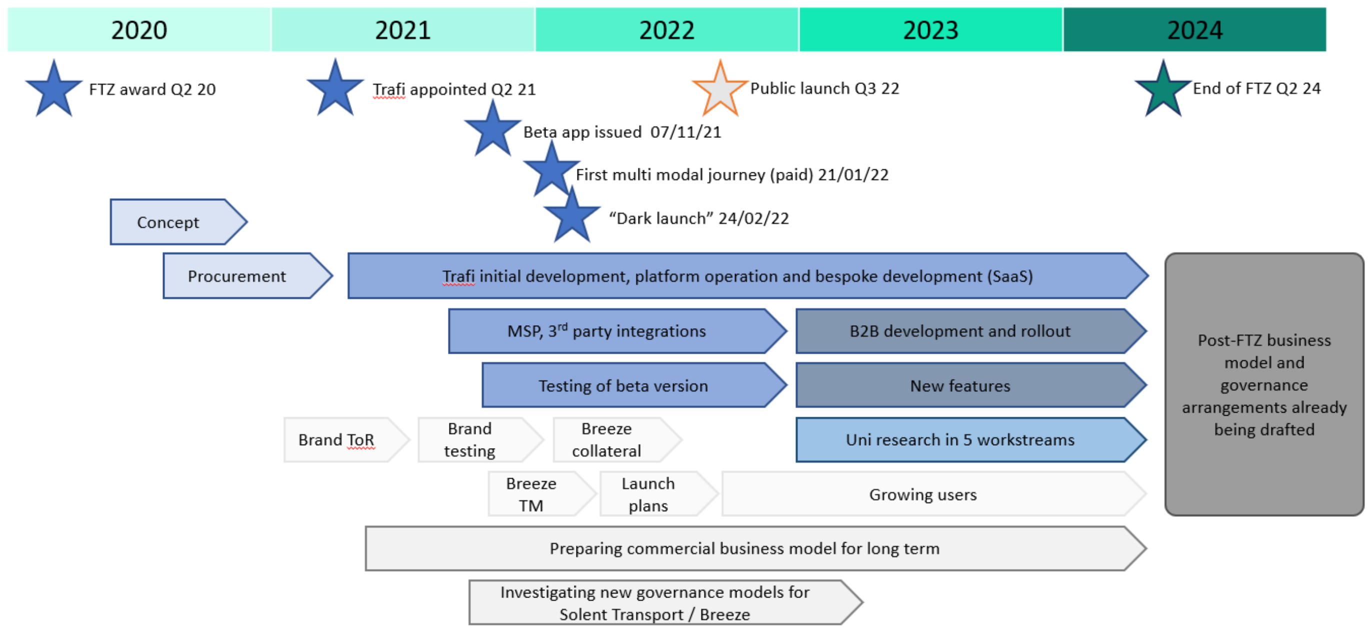


Figure 9: Breeze project plan

3.1.3 Progress to date

The contract for development of Breeze was signed in early 2021 following a procurement process during 2020. Throughout 2021 and 2022 a programme of development and testing of the back office systems and user app has been underway, together with the on-boarding of MSPs (secured by Memorandums of Understanding) and integrating links to their ticketing systems (eg Ticketer) into the Breeze system. This process has also included development of a new rail ticketing module.

A "dark launch" of a beta version of the app occurred in spring 2022, to allow wider testing amongst partners, where an initial version of the app was made publicly available but only promoted to a selected audience.

Branded as "Breeze", the app was made available for use by the public in October 2022 in conjunction with the launch of Beryl Bikes by Breeze. The app is available for download at the following links:

- Google play store
- Apple store

Currently the app offers comprehensive multi-mode journey planning for all modes/ operators in the Solent area, and ticketing and payment for the following MSPs:

- Go South Coast buses (Bluestar, Southern Vectis, Uni-Link)
- Voi e-scooters
- Beryl bikes/ e-bikes & e-scooters

By early 2023 the following additional MSPs are planned to be available:

- National Rail ticketing
- Xelabus
- Stagecoach South

- Firstbus Solent/ Southampton City Reds
- Ferry operators

During 2023 the remaining MSPs and modes are expected to be added:

- DDRT
- Car clubs, taxis
- Car parking

Rollout of additional features and capabilities and iterative improvements based on research and user feedback will continue across the rest of the FTZ programme.

3.2 Solent Go improvements

Funded through the FTZ programme, several enhancements to Solent Go are planned for delivery by 2024. These new products were informed by market research and engagement with operators and users undertaken in 2019, and are covered by a Heads of Terms with SHBOA. Research that informed these plans consisted of:

- An online survey sent to all email addresses for registered Solent Go card holders asking a variety of questions about the proposed new Solent Go products (155 responses)
- A survey distributed to Southampton City Council's People's Panel (a group of residents signed up to receive a wide variety of polls related to Southampton city council services and the city in general) (655 responses)
- A focus group of 5 Solent Go users – to elicit detailed user feedback about the new product proposals

Overall, the engagement indicated that most of the proposed new products and improvements would be useful for existing and potential customers. Addition of integrated rail products, carnet tickets and city region zones were strongly supported, but the "hopper ticket" was less well-understood.

The new Solent Go products planned to be delivered via the FTZ programme are:

<u>Carnet Solent Go tickets:</u> These tickets were introduced in 2021 and offer a pack of 5 day tickets (for the Portsmouth, Southampton and Solent region zones) which can be used non-consecutively. These products aim to offer a multi-operator ticket in a format which better matches more flexible working/commuting patterns. Carnets provide a small saving for the user compared to purchase of individual day tickets:

- City tickets, pack of five – £22.50 (discount £2.50)
- Region tickets, pack of five - £39.00 (discount £1)

These tickets have not yet been widely promoted- a full promotion effort will be undertaken early in 2023 in parallel with the full Breeze launch.

<u>New Portsmouth and Southampton City Region zone products:</u> two new "city region" zones, covering the cities and also suburbs within each city's immediate travel to work area, are planned to be created in order to better cater for cross-boundary journeys into the cities form the wider city regions. Pricing is expected to be set at an intermediate point between the existing City and Solent Region zone prices. These products are intended to support / complement the TCF initiatives being delivered by Portsmouth and Southampton City Region.

<u>"Hopper" ticket:</u> No "single" ticket or product that is attractive for short/ one -way multi-operator journeys is currently offered in the Solent sub-region and it is believed there is a gap/ niche for such a product. The approach that has been developed at an outline level with SHBOA and is planned for delivery during the FTZ programme is a

time-limited product inspired by the TfL “hopper” ticket which allows unlimited use of buses within a fare zone for a period of, for example, 60 or 90 minutes- sufficient to enable a one-way trip involving multiple buses/operators to be reasonably undertaken. Such a product would be relatively innovative for the UK outside of London.

Discounted Solent Go ticket products for jobseekers: This product is planned to expand the current discount scheme offered by some Solent bus operators aimed at Jobcentreplus users, to Solent go products.

Rail product: The Solent sub-region has a reasonably comprehensive network and 31 rail stations, albeit many of these are served infrequently. Analysis of MOIRA data (incorporating ticketing sale data) from 2019 for the Solent Connectivity Strategic Study[6] found that whilst the London market is the largest individual market for rail in Solent (and because it attracts some of the highest fares it is highly important for operator revenues), for every rail journey from Solent to London, there are about five journeys between origins and destinations within Solent. For many medium distance journeys in Solent, there is little competition between bus and rail – for example the main public transport connection between Portsmouth and Southampton is via rail (although there is a parallel but much slower and less frequent bus route), and there are no direct bus services offering key connections such as Swanwick and Fareham to Havant (across the north of Portsmouth) or Eastleigh to Fareham.

Therefore a Solent Go rail product allowing seamless ticketing between rail and multiple bus operators, would be highly complimentary to current travel patterns and network provision. There have been ambitions to develop such a product dating back to 2007. The 2007 South West Trains franchise, and the 2018 South Western Railway franchise both made commitments to develop such a product but did not achieve this. Funding is available within the Solent FTZ programme to develop such a product (following discussions at the time of the development of the programme) and ambitions remain to work with the current operator (SWR) to deliver such an initiative but this will be subject to overcoming various barriers within the rail industry. In the meantime, the Breeze app will allow a better level of integrated planning and ticketing between rail and bus.

3.3 DDRT trial

This project will trial the implementation of Digital/ Dynamic Demand Responsive Transit (DDRT) services in various parts of the Solent sub-region. This will include integrating the booking, payment and ticketing for these services into the Breeze app so that DDRT services are offered by the Breeze journey planner alongside all other modes, where a suitable service exists for a user’s requested journey. This will also enable trial of use of DDRT as part of multi-stage / multi-mode journeys – for example, offering a DDRT “last mile” option from a rail station as part of an integrated journey plan, ticketed / paid for via a single transaction.

Currently there are no DDRT services in the Solent sub-region although there are a significant number of Community Transport services (particularly in the less urbanised/ more rural areas, primarily in Hampshire and parts of the Isle of Wight) which function as Demand Responsive Transit albeit planned/implemented via “traditional” methods.

This trial will procure a DDRT back office system (to provide the required cloud database, driver app and customer app system to allow DDRT functions) which will be made available to transport operators, and will trial the application of this system to several Community Transport services in the Solent sub-region and monitor and evaluate the outcomes. Importantly, will also integrate this DDRT back office system (and the associated services) into the Breeze MaaS app system allowing access/booking of these services via Breeze.

The project is split into two committed/planned phases and one potential extension phase:

[6] Solent Connectivity - Continuous Modular Strategic Planning (networkrail.co.uk)

Phase 1 (pilot): This phase is planned to launch in March 2023 and is expected to last approximately six months. It will implement a pilot of the DDRT back office and dynamic routing, app based booking and associated features to one vehicle at SCIA Transport in Southampton (vehicle used to operate Southampton Dial-a-Ride) and one vehicle at FYT Bus in the western part of the Isle of Wight (used to operate this operator's afternoon services).

As well as introducing these community transport operators and users to Digital DRT services (in order to develop a "template" for application elsewhere) during this phase of the project the integration between Breeze MaaS and the DDRT back office will be undertaken. Therefore an interim customer app will be used during this Phase.

As of October 2022, the procurement process for the DDRT back office provider is approximately 50% complete and the project is moving from detailed planning (completed 2021/22) to implementation of Phase 1.

Phase 2 (main trial): Subject to a successful Phase One pilot, the project will look to extend to a second phase to include more of the vehicles operated by the two community transport providers in Phase 1, as well as expanding the trial to incorporate one or two other community transport operations across the Solent area, with options to incorporate other types of public transport operator. This phase will introduce DDRT options to the Breeze MaaS app (deep integration of DDRT planning, ticketing and payment) and will also expand the range of DDRT services that are operated, potentially to up to 10 vehicles across four operators:

- FYT Bus: potentially 3 vehicles
- SCIA Transport: potentially 2 to 3 vehicles
- Port Solent DRT trial (PCC BSIP funded): it is expected that the Solent DRT back office will be used to enable this trial, which is expected to be operated by a single vehicle
- Hampshire Community Transport trial: potentially around 3 vehicles

This phase of the trial is expected to run from mid/late 2023 to late 2024 and collect data to assess the effect of DDRT via MaaS on patronage, user satisfaction and service performance (eg utilisation rates) and financial performance, to help inform a potential business case for a potential third phase of the project.

3.4 Marketing & Comms/ Behaviour Change

Marketing and communications activity, with a particular focus on achieving behaviour change, hinges predominantly on the successful implementation and growth in users of Breeze.

To ensure a coordinated approach to travel behaviour change activity across the Solent region, the Solent Transport Marketing Communications Manager has convened a Behaviour Change Marcomms Working Group, consisting of transport and communications officers from across the Local Authority partners. The group meets monthly and is used to reflect on the approved FTZ behaviour change strategy, disseminate FTZ marcomms tactics, challenges and opportunities to collaborative working. Partner officers are encouraged to use the meeting as a forum to identify collaborative opportunities beyond the FTZ and share best practice.

Promotion and marketing of Breeze adopts a two phase approach:

Phase 1:

- [Oct 22-Jun 25] Grow brand awareness through organic social media content. This approach is supported by activity on the MSP and partner LTA social media channels.
- [Jan 23 - Mar 23] Paid social media campaign to improve brand awareness, retargeting campaign alongside Google PPC (pay per click) advertising to drive website traffic and increase downloads.
- Monitor performance throughout with a focus on identified audience groups

- Evaluate effectiveness of promotion to target audiences. Use learnings to inform Phase 2.

Phase 2:

- [Apr 23 - Mar 25] Continuation of digital campaigns from Phase 1
- [Jun 23 - Mar 25] Intermittent use of radio adverts, above the line traditional media campaigns (e.g. billboards) and programmatic delivery of digital audio and blended format campaigns. All the campaigns will be implemented in concordance with seasonal milestones where the audience is more receptive to behaviour change prompting i.e start of school/university terms, new year, or start of summer holidays.

Additionally, Breeze will utilise Customer Relationship Management (CRM) software to engage Breeze users and reduce user ‘churn’ (users choosing to disengage with the app and eventually delete it). The CRM software will allow the FTZ Programme to develop timely and relevant messages for users that will move them through the stages of behaviour change, from awareness of their options, through to peer advocacy. The Solent FTZ is working with academic partners at the universities of Portsmouth and Southampton, as well as with consultants from the Behavioural Insights Team to identify the most effective type of messaging and the optimum time to share.

The Solent FTZ programme is working alongside regional MSPs to ensure buy-in to the Breeze brand and improved access to regional transport services. MSPs will be asked to promote their involvement with Breeze across physical assets, digital assets and vehicles.

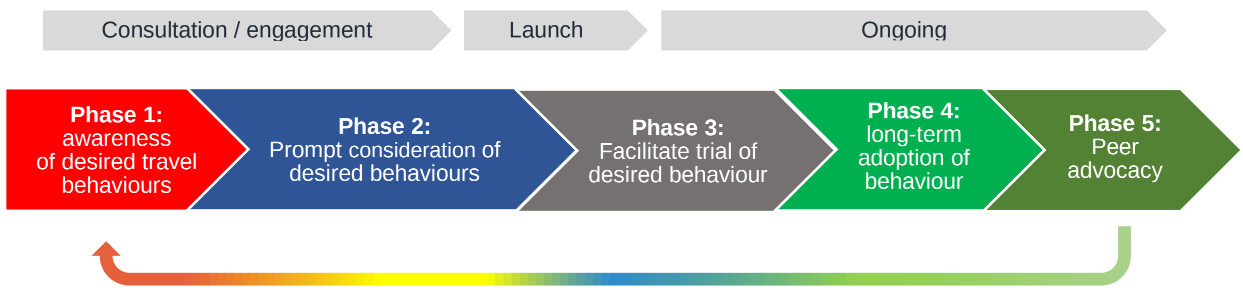
The Solent FTZ behaviour change strategy works across two levels:

Stream 1 - Regional Marcomms Activity

- Promote desired travel behaviours (across one of the 5R principles: Reduce, Remain, Reroute, Retime & Remode) and build recognition and behaviour change momentum.
- Influence travel behaviours using annual and seasonal opportunities as motivators for change, in partnership with local transport authorities and other stakeholders.

Stream 2 - Project Level Marcomms Activity

- Accelerate behaviour change by using each FTZ intervention as ‘an opportunity to try something new’, as well as something that will benefit everyone – even those who don’t use it – by increasing travel options and therefore travel capacity for all.
- Use the behaviour change journey (below) as part of the delivery of each intervention, adapting to ensure it is fit for purpose for each project while ensuring user understand why the programme/intervention is being delivered.



4. Opportunities and aspirations for future improvements *("What more would we like to do?")*

4.1 Solent Go

4.1.1 Additional products and changes

Several of the Solent LTA's original BSIPs identified potential for additional Solent Go products to serve certain customers or sectors of the market where multi-operator and multi-modal integrated ticketing could provide benefits. Some LTAs also identified a need for other actions to raise the profile and utility of the Solent Go product range, for example through additional resource for marketing & promotion, and other changes to the current product range. The potential enhancements are identified in the table below.

Enhancement	Notes
Integrated bus/ferry product	
Solent Go evening products	
Solent Go child product	Identified by SHBOA as an enhancement likely to have greater potential
Solent Go young adult product	Identified by SHBOA as an enhancement likely to have greater potential
Solent Go family product	Identified by SHBOA as an enhancement likely to have greater potential
Changes to Solent go zone boundaries to better match demand or natural boundaries	
Reduce Solent Go price premium	
Investigation of gaps in ticket offerings which could be potentially filled by new Solent Go products	
Enhanced marketing & promotion of Solent Go on an ongoing basis	

Solent Transport have engaged with SHBOA and the LTAs to discuss all these potential enhancements. SHBOA expressed a view that child, young adult and family Solent Go products may have the greatest potential and should be considered as higher priorities. Developing these products should be a priority given the higher level of operator engagement and greater potential market for these products. Proposals to reduce or remove the Solent Go price premium are unlikely to supported by the bus operators.

Currently none of these enhancements are funded Solent-wide (with exception of Solent Go promotion which is funded through FTZ until summer 2024). However Portsmouth City Council, through their funded BSIP, do have a commitment to expanding the range of Solent Go products within Portsmouth (funded 2023/24 to 2024/25). Additionally PCC's BSIP programme includes revenue funding to support a range of new/discounted fare products within the city:

- 90 min "hopper" fare - 2023/24 to 2024/25
- Young persons discounts- 2022/23 to 2024/25
- Job seekers discounts- 2022/23 to 2024/25
- Family ticket- 2022/23 to 2024/25
- Evening ticket- 2022/23 to 2024/25

Whilst no decisions have yet been made, there is potential for these new products to be multi-operator products within the Solent Go product family, made available within the Portsmouth City fare zone (and potentially primarily fulfilled via Breeze). This could provide a valuable opportunity to test the potential uptake of many of the potential enhancements which have been proposed in one part of Solent (Portsmouth), to help inform the potential business case for wider implementation further into the future.

4.1.2 Solent Go ticket fulfilment via Breeze app

The FTZ programme roadmap includes incorporation of the ability to load Solent Go ITSO products to a smartcard via a smartphone using the Breeze app ("card pairing"). This will build on the capability offered by the existing Solent Go app.

A further proposed (but not currently committed) feature that the FTZ programme plans to explore is the retail and fulfilment of Solent Go M-tickets (as QR codes) via the Breeze app. This would enable users to purchase and use a Solent Go ticket from within Breeze if they wish to do so (for example, due to the journey planner recommending this as the optimal ticket for their needs) and then utilise the QR code ticket directly from within the app.

4.1.3 Review of Solent Go smartcards

During 2021-22 Solent Go smartcard sales and usage were clearly struggling to recover from reductions in use linked to the Covid-19 pandemic. This is probably due to changes in working patterns amongst key Solent Go user groups, plus more general user uncertainty, which make the longer period products in particular less useful or economical for users. Sales of the 28 day and 91 day products (unique to the smartcard platform) are in particular struggling to recover.

The costs (operation of the back office system etc) per transaction and per journey for the smart card, based on recent usage data are an estimated at £5.59 per ticket sale, or around 41 pence per journey. These figures are very high and appear unjustifiable. Smartcard sales account for around 20% of overall sales but the majority of the costs for implementing Solent Go.

Paper ticket usage is recovering better but sales/usage of these products are still some way from reaching pre-pandemic levels. However, this may also reflect the background trend of movement from paper to mobile tickets that we have observed. Mobile ticket usage is also recovering well.

Therefore, particularly with the potential for smartcard products to be alternatively fulfilled via M-tickets, and a high level of adoption of smartphones, a review of the future role and value for money offered by the Solent Go smartcard system and whether alternatives such as M-Tickets (see 4.1.2) and/ or contactless daily caps (see 4.1.4) could offer a better value solution is required.

4.1.3 Solent Go tap and cap products/ Project Coral back office

Solent Transport has noted the potential for some of the existing Solent Go products to be implemented as debit/credit card contactless daily/ weekly cap products. Daily/ weekly multi-operator zonal fare capping capabilities under development by Project Coral could be used to create contactless "tap and cap" versions of existing Solent Go products when the technology is more mature.

This would require all operators participating in Solent Go to participate in the Project Coral back office (including smaller independent operators) but some matters such as definition and pricing of existing Solent Go products, and governance of the scheme (via SHBOA and Solent Transport) already exist which would reduce some of the challenges to implementing such products.

4.2 Breeze MaaS

4.2.1 Project extension and ongoing sustainment/ expansion

Operation of Breeze is currently funded until the end of the Solent FTZ programme (summer 2024). By this time it is expected that core development of the product and its functions will be completed and a significant user base established. However Breeze will only have been available to the public for around 18 to 24 months by summer 2024, which may be an insufficient time period to establish it's full potential. Solent Transport have therefore submitted a proposal to DfT to extend the FTZ programme (and the confirmed operating life of Breeze) by an additional year to summer 2025, funded through the existing FTZ budget (via funding released through efficiency savings and through use of un-used contingency funds). This one year extension to the programme has been accepted by DfT and at time of writing is awaiting confirmatory ratification/ decision making by Solent Transport and its four LTAs.

Ongoing sustainment of Breeze at scale from 2025 onwards will require significant income generation and/or external funding. Extensive modelling of the combination of differing levels of market share for Breeze, and different commercial/income generation options has been undertaken by Solent Transport.

Key income sources are likely to be through rail ticket sales and through licencing fees if the Breeze system can be offered/ extended to other areas (the Breeze/ Trafi system is being developed in a manner which would enable it to be expanded to new territories much more easily than development of a new MaaS app). This modelling indicates that Breeze is likely to be viable on an ongoing basis, without external support, if a 3% to 4% market share is established for Breeze in Solent together with expansion to one or two surrounding areas; or if a high market share (6% to 7%) is established within Solent alone. An extension of the FTZ programme to summer 2025 is forecast to significantly improve Breeze's potential to become standalone viable as the extra time allows more commercial initiatives to grow market share to be undertaken.

Dependent on uptake, user feedback and results from the trial, there is a possibility that Breeze may deliver sufficient benefits that subsidy from external sources may also be justified in order to support sustainment and further enhancement. There is particular potential/opportunity to drive up market share through use of Breeze as a primary means by which PCC BSIP-funded fares initiatives are implemented.

4.2.2 Advanced MaaS capabilities

There are a number of advanced capabilities which the Breeze MaaS system would be capable of, subject to further technical and commercial/ business case development. These are referred to as "level 4" ticketing capabilities in Figure 7 and include:

- Use of the MaaS app as a "token" (eg via NFC) through which user tap ins/ tap outs on various modes of public transport are tracked; and use of the MaaS back office to calculate the most appropriate fare for the user's activity and/ or apply daily caps and undertake revenue apportionment. The use of MaaS as a means of implementing "tap and cap" type functionality would require significant commercial developments across operators. There could be scope for such capabilities and products to be rolled out across a subset of participating operators (for example, specific bus and ferry operators only).
- Developing discounted "bundles" of fares/ products - for example bundling a shared e-scooter/ bike/ e-bike ride with a bus ticket for a discounted fare to provide a first/ last mile integrated fare product. Breeze app / back office offers an integrated way of offering such bundled multi-modal products which would be difficult to develop/implement via other means. Such products could be developed and "owned" (and potentially priced) by Solent Transport- although their development would still be subject to commercial agreements.

4.3 DDRT

The DDRT trial project is funded/ committed through FTZ to summer 2024 and there is scope to extend the phase 2 trial through to summer 2025 (but not beyond) with existing funds. This would allow additional time for DDRT services, booked via Breeze, to reach a larger audience and hopefully their full potential.

At this stage there may be potential, depending on costs and benefits from Phase 2 to develop/ implement a further phase of the project:

Phase 3 (potential expansion/ "mainstreaming"): This phase would likely require a business case informed by evidence from Phases 1 & 2- to justify funding and implementation- perhaps by means of a "challenge fund" or similar initiative. Evidence would be required showing that application of DDRT to Community Transport services generates sufficient extra patronage and revenue to significantly or fully offset its additional costs in the long run; and/or offers a significantly improved user experience and satisfaction level justifying additional expenditure.

This potential further phase reflects aspirations to apply app-based DDRT principles to a wider range of community transport services expressed particularly in HCC & IWC's BSIPs as well as urban opportunities identified in PCC's BSIP. It could also involve trials of conversion of fixed line bus services to partial or full DDRT operation. This phase would follow the end of the FTZ programme ie 2024/25 onwards. The areas and services to be included would be informed primarily by stakeholders/potential funders.

Dependent on DDRT system costs, funding and operator appetite we estimate that the potential "addressable market" for this phase of the project could be as many as approximately 30 to 50 vehicles across perhaps as many as 10-15 operators in the Solent area.

By having access to a DDRT back office system, and institutional experience implementing the FTZ-funded DDRT trials, it is expected this would substantially streamline / accelerate potential implementation of DDRT services across the Solent area. Whilst converting an existing service to DDRT, or creating a new DDRT service will still require high levels of effort, Solent Transport will be able to offer the primary enabler (DDRT back office system) to operators wising to implement DDRT services from January 2023.

4.4 Marcomms / Promotion/Market and user needs research

If additional external funding is secured, or income generation is substantial, there are a number of additional marketing and communications benefits available:

- Monitoring, evaluation and reporting of data insights. For the first time in the Solent region, user journeys and transport behaviour can be tracked in real time, year-round to provide a comprehensive understanding of how infrastructure and services are utilised. The CRM system can provide detailed insights into the demographics of users and their expected behaviour in relation to key characteristics. Solent Transport will need support and additional funding beyond the current scope of the FTZ to monitor and evaluate these insights in order to pass their findings onto LTA partners for the purpose of improving infrastructure, transport service decision making and travel demand management planning.
- Integration of the Breeze CRM system into marketing and communications campaigns from the Local Authority partners. This will require an extension of the time and resource that is currently allocated to delivering FTZ marcomms and behaviour change campaigns. Liaising and coordinating with Local Authority communications leads on non-FTZ travel campaigns can support the reach of campaigns and improve responses.

- Creation of a unified travel and public transport brand for the Solent region - and beyond. Similar to TfL in London, the Breeze brand could become the defining identifier of transport services and public transport in the region. Its striking and bold brand design stands out against the region's other travel brands and could appear at all stops, stations, hubs and ticket points to improve awareness of and access to services.

Significant research and experimentation is being undertaken by University of Southampton, University of Portsmouth and Behavioural Insights Team relating to user experience for Breeze. The outcomes of this research is being re-invested into optimising the Breeze app and has potential value for MaaS and other mobility apps elsewhere.

Additionally there is scope to undertake some additional research to update our understanding of user needs and desires relating to Solent Go and related integrated/multi-operator products. The last such research was undertaken in 2019 (referenced in sections 2.1.3 and 3.2) and user requirements may have changed following the Covid-19 pandemic. This research ideally would be undertaken at a larger scale and in more locations than the 2019 research. Depending on the uptake of Breeze, there is potential to use the Breeze app to conduct this research (using built-in CRM and in-app survey capabilities) directly with users, to reach groups who may be difficult to reach (demographically or geographically) via traditional market research methods.

Summary table of measures and initiatives directly relevant to BSIPs

Measure	Implemented	Planned	Potential/ Proposed	Notes
Solent Go				
Existing Solent Go product range	Y			
Committed Solent Go improvements delivered via FTZ				
Carnets (existing)	Y			Delivery by FTZ
“Hopper” ticket		Y		Delivery by FTZ; potentially also by PCC funded BSIP
Southampton and Portsmouth city region zones		Y		Delivery by FTZ
Discounted Solent Go ticket products for jobseekers		Y		Delivery by FTZ; potentially also by PCC funded BSIP
Solent Go rail product		(Y)	Y	Depends on rail industry/ TOC engagement
New Solent Go HOPS		Y		Delivery by FTZ
Review of Solent go smartcard			Y	
Proposed Solent Go Products currently not committed/ resourced for development				
Integrated bus/ferry product			Y	
Solent Go evening products			Y	Potential to deliver Portsmouth only product via PCC funded BSIP
Solent Go child product			Y	SHBOA priority; Potential to deliver Portsmouth only product via PCC funded BSIP
Solent Go young adult product			Y	SHBOA priority; Potential to deliver Portsmouth only product via PCC funded BSIP
Solent Go family product			Y	SHBOA priority; Potential to deliver Portsmouth only product via PCC funded BSIP
Changes to Solent go zone boundaries			Y	
Reduce Solent Go price premium			Y	
Breeze app retail & fulfilment of Solent go M-Tickets			Y	

Breeze MaaS				
Breeze MaaS- initial Micromobility launch	Y			Delivery by FTZ
Breeze MaaS- full multi-modal launch		Y		Delivery by FTZ
Breeze MaaS- Breeze for business		Y		Delivery by FTZ
Breeze MaaS- Mobility credits trial		Y		Delivery by FTZ
Breeze MaaS- further function/MSP development		Y	Y	Delivery of some elements by FTZ
Breeze MaaS- creation of new (level 4) ticket products eg daily caps, bespoke bundles			Y	
Breeze MaaS continued operation beyond end of FTZ programme			Y	
Marketing & comms campaign to drive Breeze & Solent go adoption	Y	Y	Y	
Additional market research/ research to understand user needs on Breeze and Solent Go, identify / prioritise future product development			Y	
DDRT				
Procure DDRT back office system accessible to operators in Solent		Y		Delivery by FTZ (50% complete Oct 2022)
DDRT Phase 1 pilot (2 operators, 2 vehicles)		Y		Delivery by FTZ
DDRT Phase 2 trial (potentially up to 4 operators and c. 10 vehicles)		Y		Delivery by FTZ
DDRT – potential Phase 3 expansion/ extension			Y	Subject to additional funding/ business case based on Phase 2 outputs
DRT/ DDRT – specific schemes/ areas			Y	
DRT/ DDRT- challenge fund or other policy / support initiatives			Y	

Key activities/ outputs produced over the last year

Area of work	Details of activity
Solent Go	• Saver 5 carnet tickets: creation of carnet products in Unicard system and on operator's apps and soft launch took place in April 2021, although was not actively promoted at the time due to the pandemic. The promotion of the new tickets will be included within the promotion of the full Breeze app launch in Jan 2023. • Solent Go/ Breeze MaaS integration specified and scheduled; development of new HOPS underway • Engagement with SHBOA regarding potential additional Solent Go products (see section 4.1.1) undertaken Dec 21/ Jan 22 • Engagement with Southampton Mini-Link and SHBOA regarding potential participation in Solent Go of this new entrant to the Southampton bus market. As Southampton Mini Link have subsequently ceased trading, no further action was taken.
MaaS app (Breeze)	• Development of beta version of app to permit "dark launch" to a limited user base of staff at LTAs for testing from Spring 2022 onwards • Extended period of beta testing has been concluded. • Engagement and integration of transport operators continues, managed through NDA's and MOUs. • Development of Transport Operators Agreements to replace the current MOU's is progressing. • Significant effort on development of rail ticketing- application to RDG for a Travel Agent License to retail rail products, as well as our accredited solution, have now both received approval, and ticketing bond and application for a Travel Agent Licence has been submitted to Train Operating Companies • Public launch of micromobility focused version of the app to support bikeshare launch on 6th October 2022. Includes bikeshare, e-scooters and also ticketing for Go South Coast (Bluestar, Uni-Link, Southern Vectis) buses. Full featured version to launch Jan 2023 • Research and evaluation by Universities and Behavioural Insights Team underway
DDRT trial	• Project redesign completed and approved by FTZ Programme board Jan 2022 • Project initiation and resourcing (recruitment of project officer, procurement of advisory consultant) completed • Detail planning for launch of Pilot phase at two operators underway • Procurement of back office system provider underway for completion December 2022
Marketing & communications	• Marcomms strategy and branding and collateral developed for Breeze app launch • Digital only media plan implemented for Breeze micromobility launch (October 2022) • Procurement of Customer Relationship Management (CRM) software for Breeze underway • Convened a Behaviour Change Marcomms Working Group, consisting of transport and communications officers from across the Local Authority partners

Bikeshare	• Initial launch of the first tranche of bikes/ ebikes in Southampton, Portsmouth and on IOW took place on 3rd October 2022, followed by a public launch on 6th October 2022 - bikes accessible via Breeze app
E-scooter trials	• Continued operation of trials with decision making by PCC/SCC in October 2022 to extend trials until 2024 • SCC and PCC have now made permanent TROs to facilitate the e-scooter trial beyond November 2022 • Research and evaluation on trial outputs/ results continues