

**This and the following 87 pages comprise Schedule 7 referred to in the foregoing
Contract between the Scottish Ministers and Serco Ltd.**

SCHEDULE 7 – MARKETING & SALES DELIVERY PLAN

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Glossary of Terms

Term	Definition
API	Application programming interface
BSL	British Sign Language
CMS	Card Management System: process for creating and registering ITSO smartcards
Contactless EMV	These devices enable transactions to be made by waving or tapping on an EMV® Contactless enabled terminal
CRM	Customer Relationship Management
EMV	Europay, MasterCard and Visa
HOPS	Host Operator or Processing System
GDPR	General Data Protecting Regulation
Influencers	Prominent individuals in specialised areas who have a relevant following on social media channels
ITSO	Standard for Smartcards and processes by UK Government
MACS	Mobility and Access Committee for Scotland
MCA	Maritime and Coastguard Agency
MSP	Managing Successful Programmes
NFC	Near Field Communication – an evolution of RFID where a wireless link enables data to be exchanged between two devices in close proximity
NRS	National Reservation System
ONS	Office of National Statistics
ORR	Office of Rail and Road
Passenger manifest	MCA mandated passenger list for every sailing
PCIDSS	Payment Card Industry Data Security Standard
PPC	Pay-per-Click – advertisers pay each time their advert is clicked
QR code	Trademark for a type of matrix barcode
RFID	Radio Frequency Identification Device – a technology whereby digital data encoded in RFID smart cards are captured by a reader via radio waves
ROI	Return on Investment
RNLI	Royal National Lifeboat Institute
RTD	Remote Ticket Download
SATA	Scottish Accessible Transport Alliance
SEO	Search Engine Optimisation
SIRI	Service Interface for Real-time Information
SLA	Service level agreement
TOC	Train Operating Company
UI	User Interface
Validator	Fixed or mobile device with RFID interface to enable checking of smartcards

A5 Marketing and Sales

1. Executive Summary

1.1. Serco's Approach to the delivery of the Marketing and Sales Delivery Plan

Our proposed Marketing and Sales Delivery Plan sets out a clear strategy for promoting the Northern Isles destinations and the ferry service itself for the Contract Period. We are mindful of the Scottish Government's (SG) objectives, to be:

- Responsive to local needs and appropriate to the requirements of those using them
- Contribute to sustainable economic growth on our islands and in our remote rural communities
- Be resilient to social and commercial stresses

We have noted that the Fare Tariff and Timetable are set by the Scottish Ministers and subject to annual review and revision.

This Plan has been structured around the ITT Vol 2 – A5, with a section explaining about the challenges with regard to Marketing and Sales as a whole, relating to technical, logistical and management challenges. We have then covered:

- The three sub-plans individually, which each contain our Approach and methodology, utilising the best practice we have developed over the last six and a half years on which our Proposals have been based
- Our Proposals for the new contract term

We have set out the proposals which will form part of the agreement between Scottish Ministers and Serco and show where there are areas of continuous improvement which will be targeted throughout the term of the contract. The areas of continuous improvement may require TS, CMAL or third-party approvals, feasibility studies or business cases for them to be delivered, and thus are to be viewed as having the potential to be implemented.

Serco has an in-depth knowledge of the risks that could affect NorthLink Ferries' service where appropriate, and we have identified the high-level risks and the actions required to mitigate them, or to bring them to as low a level as reasonably practicable.

Serco's marketing proposals are underpinned by in-depth understanding of our customers and research into latest market trends, both of which have been fundamental in developing our overall strategy. Looking ahead, our proposals will continue to be supported by investment in a new Customer Relationship Management (CRM) System Redacted

Our dedicated marketing team will deliver further improvements to our website and mobile applications in addition to executing targeted campaigns to raise awareness of the Service and attract new visitors to the islands, particularly during shoulder seasons. We will continue to work closely with local destination marketing organisations, local businesses, activity providers and attractions and are excited by the prospect of developing further joint marketing campaigns with Visit Scotland. Redacted

Recognising the importance of NorthLink in providing a lifeline service for the islands, Serco will continue to support local communities through regular engagement and consultation regarding the service, provision of timely information updates and implementing our existing sponsorship programme assisting individuals and groups. To stimulate economic growth, we will provide opportunities for small and medium enterprises, such as hosting Meet the Buyer events and onboard tastings of local produce. Serco will also offer community space on vessels and at the shoreside, enabling these areas to be maximised when not in use, further demonstrating our commitment to local people.

Having forged many successful business relationships with freight and group travel trade customers during the existing contract term, we will share learning outcomes from our recently commissioned demand analysis study to make certain that available space on vessels is maximised to the mutual benefit of all stakeholders. Our personnel will continue to use our proven techniques to effectively engage with these customer segments through the combination of dedicated account management and event attendance, while our freight team will fast-track our marketing drive for 2019, by taking a branded tour trailer on the road to engage with this audience.

Serco prides itself on our customer service and being easy to buy from and we will continue to improve all aspects of our booking system and sales processes, as well as offering multiple channels for engagement and fulfilling all specified Smart Ticketing requirements. Based on our recent customer research, further improvements for the new contract will include extending the opening hours of our Customer Contact Centre, providing a live chat facility to increase speed of response and installing dedicated Travel Information Screens.

1.2. Key Improvements

Our key improvements are outlined in Table 1 below:

Table 1: Key Improvements Proposed

Improve our customer app functionality and provide additional enhancements for those using mobile devices to facilitate frictionless travel in response to research findings
Improving online booking functionality and introducing live chat to assist customers, responding to specific queries and/or complaints; this will help drive sales and inspire confidence for first time users of our website
Making certain that we are easy to buy from, we will improve all aspects of booking and sales processes and fulfil Smart Ticketing requirements
Extended opening hours of our customer contact centre will maximise the potential availability of office personnel and improve customer service
Dedicated passenger information screens will support sales activity and improve the customer experience with the provision of information about special offers and promotions, as well as opportunities for wildlife spotting
Travel information screens will provide timely travel updates for air, rail, road and bus connections as well as notifications of travel disruption, supporting passenger travel planning
Provision of Visit Scotland Ambassador programme training for customer facing personnel on vessels and at passenger terminals will improve customer service and support destination marketing for the islands
We will influence future demand according to capacity through focused marketing activity to increase shoulder season sales, achieved by running highly targeted and relevant integrated marketing campaigns working with local businesses, attractions, activity providers and destination marketing organisations. This will optimise value from running the service for Transport Scotland
Itinerary-led, multi destination travel campaigns in partnership with our Caledonian Sleeper contract and Visit Aberdeenshire will raise awareness of North East Scotland and Northern Isles destinations, as well as generating sales to a receptive audience in London and the South East of England, as identified through customer research activity

Table 1: Key Improvements Proposed

Information provision to improve travel connectivity for foot passengers, electric vehicle charging at ports, improved facilities for cyclists and initiatives to support customers in making travel choice to minimise their impact on the environment

Offering space on vessels and at harbour offices for hosting local events will endorse our commitment to supporting local communities

Implementation of a new Customer Relationship Management System will maximise value from marketing expenditure by targeting marketing outputs to relevant groups of customers based on detailed understanding of their similar characteristics, profiles and behaviours

Improvements to enhance the website's visual appeal as well as its functionality, underpinned by search engine optimisation will increase site visitors and drive sales

2. Introduction

Serco's marketing approach for the Northern Isles Ferry Service is informed by a combination of our experience of operating the Service since 2012, customer insight and community understanding through existing engagement. It combines that existing knowledge with marketing logic supported by innovation and fresh thinking that will enable us to build on our existing achievements to drive future improvements drawing on our wider transport marketing too.

Our objectives for the Northern Isles Ferry Service contract include:

Redacted

Since taking over the service in 2012, Serco has invested significantly in NorthLink's operations, services and marketing which has delivered the following results:

Serco achievements for NorthLink Ferries since 2012

8% increase in the number of passengers carried, bringing the total to more than 1.5 million

20% increase in number of vehicles carried

5% increase in cabin occupancy

99% of customers rated their overall experience of using NorthLink as being positive

The popularity of the NorthLink Magnus brand most prominently featured on the side of our vessels and onboard has been endorsed by ongoing take up of our popular 'Magnus on Tour' competition on social media and even by youngsters, who are delighted to use our dedicated

Viking play areas and receiving meals served in cardboard NorthLink vessels. Examples of the NorthLink Magnus brand are shown in Figure 1 and Figure 2.



Figure 1: NorthLink Magnus brand, reflecting the islands' Viking roots, representing dynamism, power and pride



Figure 2: Customer comments posted on social media, endorsing the Magnus brand

Figure 3 features some of our marketing highlights and service delivery achievements since 2012, as well as those we plan to implement from 2020 onwards.

Redacted

Figure 3: Serco's marketing highlights and service delivery achievements and objectives 2012–2020

3. Understanding the Requirements for the Marketing and Sales Delivery Plan

Table 2: Assessment of the Challenges — Marketing and Sales

Marketing	
Technical	Redacted
Logistical	

Table 2: Assessment of the Challenges — Marketing and Sales

	Redacted
Management	
Booking System	
Technical	Redacted
Logistical	
Management	
SMART Ticketing	
Technical	Redacted
Logistical	

Table 2: Assessment of the Challenges – Marketing and Sales

Management	Redacted
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4. Marketing and Sales – MS1

4.1. Approach to Marketing and Sales

Our Marketing Strategy for NorthLink builds on the strength and success of our existing approach and comprises:

- Proactively monitoring customer behaviour and preferences, wider market trends and the macro environment to ensure that we can quickly adapt to changing market conditions
- Ongoing provision of targeted, relevant and measurable communications that are personalised for individual customer profiles that are insight led
- Building brand loyalty through:
Redacted
- Making certain that we are easy to buy from by continuing to improve all aspects of booking and sales processes, such as improvements to our websites and fulfilling Smart Ticketing requirements.
- Influencing future demand through focused marketing activity on areas identified for growth as a result of recent demand analysis, while forging mutually rewarding partnerships at local, regional and national levels.
- Creating compelling marketing campaigns that differentiate NorthLink’s onboard experience to alternative travel choices.
- Monitoring and measuring marketing and sales outputs and gathering customer feedback to test and refine our strategy, ensuring continuous improvement.

Building on existing customer insight, our improved profiling capability will allow us to tailor relevant communications for all customer segments, in accordance with their type and whether or not they are travelling with NorthLink for the first time; effective use of customer relationship management tools will enable us to quickly react to changing customer behaviours so that we can maximise on any opportunities as they arise.

We have already developed solid knowledge of our target customers and their changing behaviour and requirements. Redacted

The Table 3 below provides details of our customer insight findings and

the potential marketing opportunities they present that are addressed within the content of this Plan.

Table 3: Customer insight findings following research completed in 2018

Redacted

4.2. Proposals for Marketing and Sales

Serco will build on the existing strength of the NorthLink 'Magnus' brand through delivering our marketing and sales proposals, based on solid customer insight and knowledge of emerging

travel trends, maximising return on marketing investment and value for money for Scottish Ministers.

This will be achieved by:

Redacted

NorthLink offers a unique experience as soon as a passenger steps onboard, and during our development of this tender submission, we have identified some areas to further improve communication and sales activity at various touchpoints of the customer journey (see Figure 4), for new customers and existing ones. This is particularly relevant from the time of booking to boarding vessels and the period of reflection, directly following sailing. With this in mind, we will evolve our brand promise to make sure that 'Great things begin with NorthLink', so that customers are always well informed, engaged and involved throughout all stages of their customer journey with us. Our proposed improvements will be facilitated through implementation of a customer relationship management (CRM) system, (see Section 4.2.5.1).

Redacted

Figure 4: Our proposal for communication and sales activity improvements throughout the customer journey

4.2.1. Contract Welcome Programme for Serco personnel

Recognising the importance of our staff as ambassadors for NorthLink and the impact of their roles in delivering the overall customer experience, to garner their continued support, we will commemorate the beginning of the new contract by hosting a Contract Welcome Programme to celebrate our achievements so far and outline our objectives going forward. The format will include:

Redacted

- Presentations by senior personnel and a guest speaker such as island stakeholder, a customer representative or politician
- Provision of relevant contract information
- Opportunity for personnel to raise questions
- Relevant, branded commemorative items to further boost staff engagement

The launch event will lay the foundations for the standards we expect for the service going forward, aligned with Transport Scotland's objectives. The event will be strengthened by internal communications to staff to keep them abreast of marketing activity, in addition to reinforcing support for the Visit Scotland Ambassador Programme through World Host training.

4.2.2. Arrangements for publicising the Ferry Services and charges applicable (including the range of media channels to be deployed)

Redacted

Table 4 describes all the channels we will continue to use for publicising the ferry services and charges applicable.

Table 4: Description of NorthLink's channels deployed for publicising ferry services and charges

Channel	Summary
Timetable	<p>Printed timetables will be issued annually in an A5 format. These provide a concise guide for getting to the Northern Isles for members of the local community as well as information for visitors, including:</p> <ul style="list-style-type: none">• An overview of what the Northern Isles have to offer• Crossings information and travel distances to NorthLink operational ports from major Scottish cities• Transport links for foot passengers, through bus operator Stagecoach• Information about things to see and do in Orkney and Shetland• Services and promotions available onboard vessels, such as the Feast Restaurant, Magnus Lounge, Bed and Breakfast offer on the Hamnavoe, valet parking, celebration packages and special offers• Standard fares <p>Redacted</p>
Mobile Apps	<p>Integrated with NorthLink's existing ticketing system to eliminate the need to replicate data, we will maintain and improve our mobile app, launched last year. This will enable customers to reserve tickets, cabins and vehicle spaces on sailings, as well as enabling them to pay securely via their mobile device – either as a guest or with their NorthLink ID account.</p> <p>We will increase our app functionality to assist customers in the following ways:</p> <ul style="list-style-type: none">• Providing service notifications and reminders regarding ferry times, suggested arrival times and notifications of service disruption• Personalised content through provision of relevant hints, tips and recommendations for different customer profiles planning their travel• Increasing interaction for customers through their onboard experience by providing the geographic location of vessels at any time and access to onboard entertainment services• Integration of the app with our Smart Ticketing offering to provide on-device tickets

Channel	Summary
Websites	<p>Meeting the needs of all our customer segments, we offer three websites to address the specific needs of passengers at this link northlinkferries freight customers at this link northlinkferries and travel trade customers at this link grouptours northlinkferries</p> <p>We will make the following website improvements for publicising ferry services and charges:</p> <ul style="list-style-type: none"> • Improving online booking functionality (full details of this initiative are provided in section MS2 of this response). • Refreshing the ‘routes’ section to provide detailed information on end-to-end journeys. • Introducing live-chat to assist customers in responding to their specific queries and/or complaints, as well as providing live notifications. This will support exceptional customer service but will also help in driving sales and providing confidence to first time visitors to the website. • Improving our recently applied ‘Recite Me’ accessibility and translation tools to the NorthLink website. These tools provide text to speech functionality, dyslexia software, an interactive dictionary and a translation tool with over 100 languages. This will extend its reach as an information source to less able viewers, such as those with sight or hearing impairment. • Improving our digital channel availability by developing voice capabilities to be used through devices such as Amazon Echo, for responding to questions such as ‘Alexa is the Stromness ferry on time?’
Telephone support	<p>For those customers who wish to make enquiries by telephone, we will increase the accessibility of our contact centre presence from 05:30 to midnight (Monday to Friday). This will maximise the potential availability of office personnel at Stromness, who are already there for the 06:30 departure of the Hamnavoe vessel and in the evening by those already employed at Hatston from 20:00 for the 23:00/23:45 arrival/departure of the Hjaltland or Hrossey service.</p>
Harbour office/waiting room presence	<p>To improve the customer experience at this touchpoint, in addition to our customer service staff presence to assist passengers, we will promote cabin upgrade opportunities, seasonal special offers and provide information about wildlife spotting opportunities via passenger information screens. We will also install separate, dedicated Travel Information Screens to provide an early warning Notice Board of any sailings under review as well as travel updates for air, rail, road and bus connections.</p>
Meet and greet/check-out services	<p>Customer-facing personnel will continue to provide a welcoming experience for customers arriving onboard vessels, assisting with way-finding to cabins and other deck areas. To mitigate against the risk of queues forming in vessel reception areas during embarkation, we will provide additional passenger information screens to assist way-finding on arrival. By freeing up time for staff in this way, they will be able to provide one-to-one assistance, promote last minute cabin or lounge upgrades, meal deals or seasonal packages, and support those seeking to arrange onward or return journeys.</p>

4.2.3. Co-operation with complementary tourism and economic services provided by local businesses

Serco will continue to work collaboratively and support the economic growth of the local communities where we operate, as reflected through our existing positive relationships with VisitScotland, Destination Orkney, Shetland.org., group bus tour providers, the Scottish Tourism Alliance and local businesses. Examples of our existing activity in this area includes organising trips to Shetland and Orkney for the Aberdeen and Shire Hotels Association to build links between the islands and the North East of Scotland; sponsorship of Orkney Food and Drink Awards; and presence at the Ultimate Business Show, hosted by Aberdeen and Grampian Chamber of Commerce.

Redacted

Redacted

4.2.3.1. Promotional campaigns targeting 'special interest' take-up during shoulder seasons

Serco will continue to work closely with local businesses, attractions, activity providers and destination marketing organisations (DMOs) to build on our existing calendar of promotional campaigns in place throughout the year. Redacted
Redacted

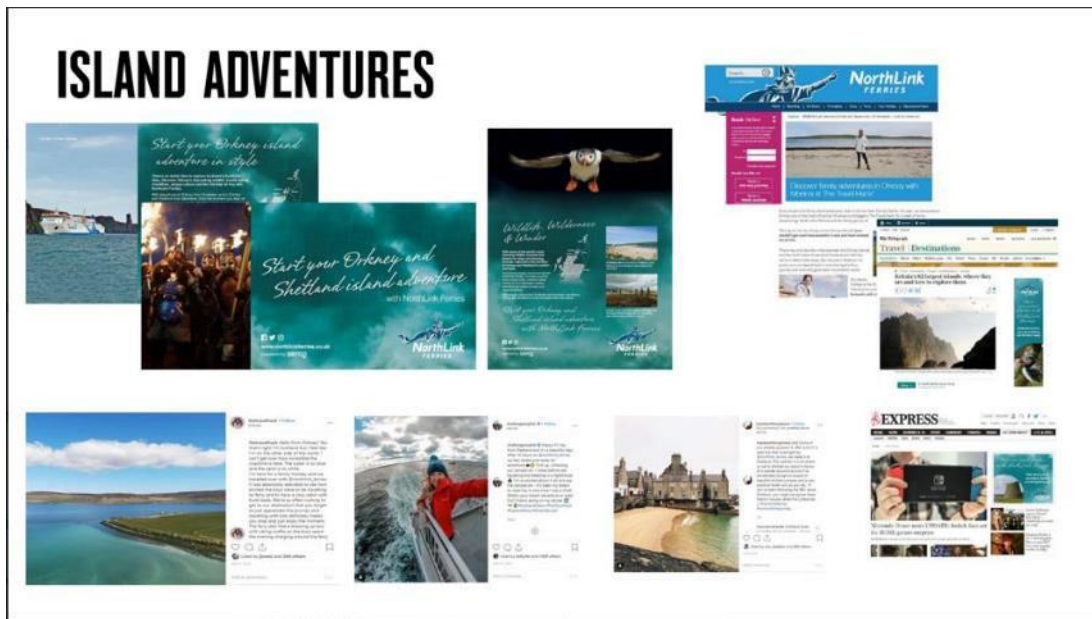


Figure 7: Illustration of the breadth of communications applied on our 'island adventures' campaign

4.2.3.2. Itinerary led travel

Serco will jointly develop and promote multi-destination trips for foot passengers, Redacted

Sleep to Snow delivers sales boost for Caledonian Sleeper

During Winter of 2017 Serco launched our successful 'Sleep to Snow' campaign, in partnership with ski and snowboard film producer, Warren Miller, to promote the Caledonian Sleeper service as a mode of travel for getting to the Scottish mountains for skiing trips from London. The campaign comprised a combination of digital advertising, media relations activity and Facebook engagement to fulfil the objective of increasing 'shoulder season' bookings on the Highland routes from London Euston. The successful campaign delivered Redacted



Figure 8: Sleep to Snow advertising campaign creative

4.2.3.3. Supporting Green Travel

Through our research into travelling behaviour featured in Appendix 2, Serco recognises there is heightened consumer awareness of the negative impact that travelling has on local communities. Redacted

To further encourage green travel choices, we will:

- Work with harbour authorities to highlight walking routes via signage and ensuring harbour areas are safe and well-lit
- Promote improvements in facilities for cyclists including covered cycle storage facilities and charging points for electric bikes at terminals and improved cycle storage on vessels
- Forge links with local car hire companies and, through our email and digital channels, promote the benefits for passengers of hiring a car on arrival at their destination port
- Ensure information provision throughout the customer journey to aid transport integration and way-finding to and from ferries, railway stations, bus stations and taxi ranks
- Make wider use of mobile apps and social media channels to attract relevant customer profiles with environmentally themed promotional campaigns for each season, run in partnership with event organisers and activity providers

Redacted

Our proposals will encourage green travel and enable tourists to explore North East Scotland and the Northern Isles, while minimising impact upon its natural beauty.

4.2.3.4. Engagement with our stakeholders through our Northern Lights publication

To maintain regular engagement with stakeholders and promote activities and events on the Northern Isles for visitors, Serco will continue to produce our bi-annual Northern Lights magazine as shown in Figure 9. This publication contains a letter from our Managing Director, topical news and regular features written in collaboration with local businesses that promote tourism. It also covers subjects of special interest, such as photography and wildlife, and tackles wider issues such as climate change and preventing pollution at sea.

Both our Northern Lights and A5 timetable and guidebook publications feature our website, Facebook and Twitter address details, assisting our process of encouraging customers to consider using online media for sourcing information about the Service.

4.2.3.5. Community engagement

NorthLink plays an important role in contributing to sustainable economic growth for the islands and remote rural communities and, likewise, local communities are important for Serco, given that we are committed to recruiting locally, wherever possible. We will continue to build lasting relationships with these stakeholders through ongoing consultation, communication and provision of relevant information. Redacted

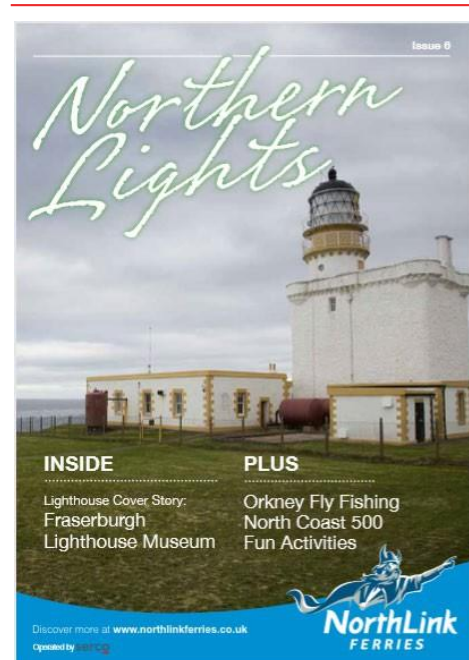


Figure 9: NorthLink magazine, issue 6

Serco's commitment to the local business community

Serco prides itself in our commitment to sourcing food and beverage products from within 50 miles of our operating ports, as shown in Figure 10, and we will continue to expand our local supplier base and promote locally produced goods and services for the new contract through our sustainable procurement and customer service functions.

Redacted

Figure 10: Chart demonstrating year-on-year growth of Serco procurement of goods and services supporting its hotel operations within a 50-mile radius of NorthLink's ports

We frequently host new and growing island producers, enable tastings during sailings and showcase local produce to new audiences, such as the North East ONE Dining Club event.
Redacted

Redacted

Figure 11: NorthLink was awarded the Scotland Food and Drink Gold Award in September 2017 for adding Shetland Mussels to its menu and for taking to Twitter to promote local suppliers

Examples of Serco support for the community through hosting events in the existing contract is shown in Table 5.

Table 5: NorthLink's sponsorship of onboard community events 2016–18

Community events onboard NorthLink

Aberdeen Grampian Chamber of Commerce Food and Drink Networking, 2017

Community Food Initiative North East visit 2017, 2018

North East ONE Dining Club event on MV Hjaltland, 2016

Ferry to Fairtrade event on MV Hjaltland, 2016

Guide Dog Association Scotland training sessions on vessels 2016, 2017, 2018

Event sponsorship

We will work closely to support relevant organisations and charities to stimulate incremental demand for the Services by sponsoring local events, Redacted

Redacted

Figure 12: MV Hamnavoe hosts 400 visitors annually on our nature cruise and sample local food and drink, such as nips of Scapa Whisky and Orkney Gin

The following endorsements evidence Serco's successful partnership approach to supporting economic growth through our operation of NorthLink; shown in Figure 13 and case study.

Redacted

Redacted

Available space for use by members of the community

Serco will offer communities space for hosting local events onboard vessels and at harbour offices, subject to availability. This will maximise use of these resources as well as further endorsing our ongoing commitment to supporting the local communities wherever we are able. Redacted

Redacted

Figure 14: Dogs against drugs training session at Lerwick terminal

Redacted

Local sponsorship panel

NorthLink provides a lifeline service for the Northern Isles' communities and, as such, we will continue to maintain supportive relationships with these important stakeholders, in addition to providing individuals with a sense of ownership of the service. Redacted

Redacted

Redacted

Figure 15: Youngsters using NorthLink branded bowling balls, Super Lap Scotland competitor with NorthLink branded vehicle Shetland Football Club, and Netball Orkney wear NorthLink branded kit

Meet the Buyer events

We will continue to host biannual Meet the Buyer events Redacted

This event provides local businesses with opportunities to showcase their offerings and engage with Serco as a potential buyer of their goods and services, and to understand our strategy for NorthLink, aligned with Transport Scotland's objectives.

4.2.4. Proposals for ticketing arrangements to honour all tickets sold by Serco and termination arrangements for passing all receipts from outstanding bookings to successor operator

As the incumbent operator, Serco will ensure an effective and straightforward transition from one contract to another and ensure that the customer does not suffer any diminishment in the delivery of the Service.

In the event of termination of the current NorthLink contract, we will make arrangements regarding the value of tickets sold and agree a transfer following a process of reconciliation with Transport Scotland.

4.2.5. Proposals for provision of marketing and promotional events

Redacted

Redacted

Redacted

4.2.5.1. Customer Relationship Management (CRM)

Technology plays an important role in retaining current customer knowledge, ensuring we can adapt to changes in customer demand and that marketing messages are always relevant and effective in driving sales. With this in mind we will introduce a new Customer Relationship Management (CRM) System for the new contract, Redacted

This will enable us to:

- Use our enhanced understanding of customer profiles to deliver personalised and relevant communications
- Achieve increased efficiency in generating and distributing relevant, automated messages to customers or prospects, based upon their specific behaviours (for example, stimulating interest if a regular customer has stopped purchasing)
- Maximise value from marketing expenditure by targeting marketing outputs to relevant groups of customers based on detailed understanding of their similar characteristics, profiles, behaviours and geographic locations

Above all, the new CRM system will enable us to be smarter in our approach to improving customer communications before and after travelling with NorthLink, enabling us to maximise sales potential and enhance the customer experience at all stages of the customer journey. Redacted Redacted

Our proposals for marketing and promotional events involve using a variety of different approaches for targeting individual customer segments, as shown in Figure 18.

Redacted

Figure 18: Marketing channels for targeting each of our customer segments

The channels we will use to maximise marketing exposure for NorthLink include:

- **‘Owned’** – channels specifically within our control, such as customer account management, the website and printed publications
- **‘Paid for’ channels** – including traditional advertising through to search engine optimisation and influencer programmes
- **‘Earned’ channel activity** – through media relations and stakeholder engagement, where exposure or advocacy is earned

4.2.5.2. Owned channel marketing

Improving the appeal and functionality of the NorthLink Website

To further increase use of the NorthLink website, we will improve its appeal and functionality for users in the following ways:

Redacted

Redacted

Redacted

Redacted

Email marketing

Direct marketing is an important marketing tool and we will continue to use e-mail to communicate marketing messages, our regular monthly newsletter and updates to our services

for customers. Redacted

Social media

Serco will continue to make use of social media platforms to publicise NorthLink and engage in two-way communication with local stakeholders and visitors, Redacted

throughout the year. This will further increase brand awareness and its credibility as consumers increasingly look to friends, family and peers for advice and recommendations via social media channels. Redacted

Redacted

Figure 20: Example of creative treatment for new social media content

For the new contract, we will:

- **Work with partners** in addition to using our own social media channels to extend our access to wider and new audiences. These relationships will enable us to contribute material to promote our services for travelling to and from the Northern Isles.

- **Encourage all passengers to use Trip Advisor** to enable us to address any issues in a timely manner, support our efforts in continuously improving our performance and extend our brand exposure.

Account management – Freight customers

NorthLink ships most of the freight to and from the Northern Isles and it is this customer segment's ongoing use of the service that enables the islands' local economies to continue to flourish through industries, such as agriculture and aquaculture.

For the new contract, we will continue to build on our existing, strong relationships with freight customers and businesses, Redacted

We already work extremely closely with freight customers, all of whom have access to Freight Co-ordinators to meet their individual needs. Fully integrated into island life, members of our existing freight team have a thorough understanding of the complexities around transporting freight. Redacted

Account management – Travel trade

Serco currently works closely with over 150 travel trade partners and, for the new Northern Isles Ferry Service contract, we plan to build on our existing success. This will be achieved by Redacted

Such has been the success of our products that we are currently taking reservations for 2020 and 2021, which has necessitated early production of our 2020 Travel Guide, as illustrated in the following Figure 21.

Redacted

Redacted

4.2.5.3. Paid for channel marketing

Digital advertising

Serco will continue to use **digital advertising** to generate prospective customer interest and drive booking activity. Redacted

Redacted

4.2.5.4. Earned channel activity

Media relations and Public Relations (PR)

Serco will continue to work closely with our selected marketing communications agencies, Redacted for reactive and proactive media relations for the Northern Isles Ferry Service, co-ordinating their activity with our own marketing and sales functions. Redacted Redacted

Redacted

An example of a successful outcome resulting from PR activity has been our support for the BBC's 'Shetland' TV series which has led to filming requests for Secret Scotland and an STV documentary. This, in turn, has generated significant public interest in the Northern Isles, Redacted Redacted

Serco will continue to host familiarisation trips to the islands for the media and travel trade Redacted Redacted

Redacted

as part of our ecology management proposals, included in our Environmental Management Plan. Visual displays will also provide information enabling use of an app for logging any sightings. This engagement will support the community sightings network in generating wider public interest in marine mammals and helping to monitor migration patterns.

4.2.5.5. Integrated marketing activity

Serco has increased our investment in digital marketing techniques in response to the increased use of digital channels by consumers to search and book holidays and as a result of year-on-year learning. In response to increased consumer demand through digital channels, we will further build on our existing capability by implementing a programme of integrated communications campaigns for the Northern Isles Ferry Service contract. Redacted

Examples of campaign content includes:

Redacted

Minke whale (Northern)

Balaenoptera acutorostrata



Appearance

SIZE: MAX 7-10M

KEY FEATURES:

- BLOW HOLE AND DORSAL FIN SEEN AT THE SAME TIME WHEN SURFACING
- WHITE ARMBANDS ON ITS PECTORAL FINS
- UNIFORMLY GREY ON ITS BACK AND FINS WITH A WHITE UNDERBELLY

Figure 24: Sample passenger information screen content for encouraging wildlife spotting from the shoreside and on vessels

Redacted

Figure 25: Examples of creative treatment for advertisements

Redacted

4.2.5.6. Promoting NorthLink at Events

Serco will continue to maximise opportunities for raising awareness of the Service, its quality and scale, and to grow NorthLink passenger, freight and agricultural customers. We will continue to attend conferences and other paid for promotional events. Redacted

Redacted

Figure 26: NorthLink Travel Trade team receive an award from Visit Scotland for having the most appealing stand at the Visit Scotland Expo, held in Glasgow, April 2017

reater use of technology and geo-targeting techniques will enable us to reach a much wider audience and improve how we engage with attendees of large -scale eventsRedacted

One-to-one relationships and networking are extremely important to our work with the travel trade Redacted

Table 6: Events attended or sponsored by NorthLink, 2016–18

NorthLink’s support for events through attendance or sponsorship
Redacted

4.2.5.7. Corporate events hosting

Reinforcing Serco’s commitment to adding value through our service delivery, Serco will continue to host corporate events onboard NorthLink vessels, Redacted

building on our success for the existing contract, where we have hosted the Nautical Institute’s annual reception onboard MV Hjaltland (2016) and the Chartered Institute of Personnel and Development onboard MV Hrossey (2017).

4.2.6. Campaign planning

Our marketing campaign plans will be subject to regular monitoring and review based upon ongoing performance and customer insight. Figure 27 represents an outline marketing plan for year one of the contract.

Redacted

Figure 27: Campaign diagram

4.2.7. Resources to support the implementation of the Marketing and Sales Delivery Plan

4.2.7.1. People

Our dedicated marketing function for the Northern Isles Ferry Service will continue to be located between Stromness and the Aberdeen office, to enable representation for the mainland and islands. Redacted

The function will draw on professional guidance Redacted
be responsible for overseeing best practice and adding value across all our transport contracts in Scotland.

Redacted

The organisation structure for our NorthLink marketing team is shown in Figure 28.

Redacted

Figure 28: NorthLink marketing team organisation chart

Roles and responsibilities

The roles and responsibilities of our marketing team and related roles are described in Table 7.

Table 7: Roles, responsibilities and qualifications

Redacted

Redacted

4.2.7.2. Training

Personal development and training for roles associated with marketing and sales will continue to be promoted Redacted We will continue to offer support in the following ways:
Redacted

Redacted

4.2.7.3. Marketing and sales support

Serco will continue to work with our selected partner for marketing communications. Redacted

5. Booking Systems – MS2

5.1. Approach to Booking Systems

The key themes guiding our booking systems proposals for customers are ease, simplicity and flexibility, with our commitment to applying best practice principles through our online booking provision. Since 2012, Serco has provided simple and accessible booking channels, directly linked to the single common timetable, published each year, making NorthLink easy to buy from, for locals and visitors alike. For the new contract, our insight driven approach is to further extend our booking and information provision for all ferry users, through broadening our application of information communications and digital technology.

Redacted

5.2. Proposals for Booking Systems

Serco is committed to delivering frictionless travel for our customers and we will ensure the booking process represents a fundamental touchpoint between Serco and our customers, impacting on their choice of whether to use the services we provide. Redacted

we will continue to offer ferry tickets through multiple channels as indicated in Figure 29.

When processing bookings and allocating available space on the vehicle deck, we will ensure that we respect all customer types, being mindful of freight requirements, livestock demands on peak days and late summer movement periods, in addition to local passenger vehicles and visitors to the Northern Isles. We will sell the space allocated per category and as the sailing date approaches will adjust the allocation to maximise the deck lane usage. Our Redacted Manager will ensure this deck space requirement is scheduled and managed meticulously every day, conscious of time-sensitive freight requiring early arrival, particularly into Aberdeen.

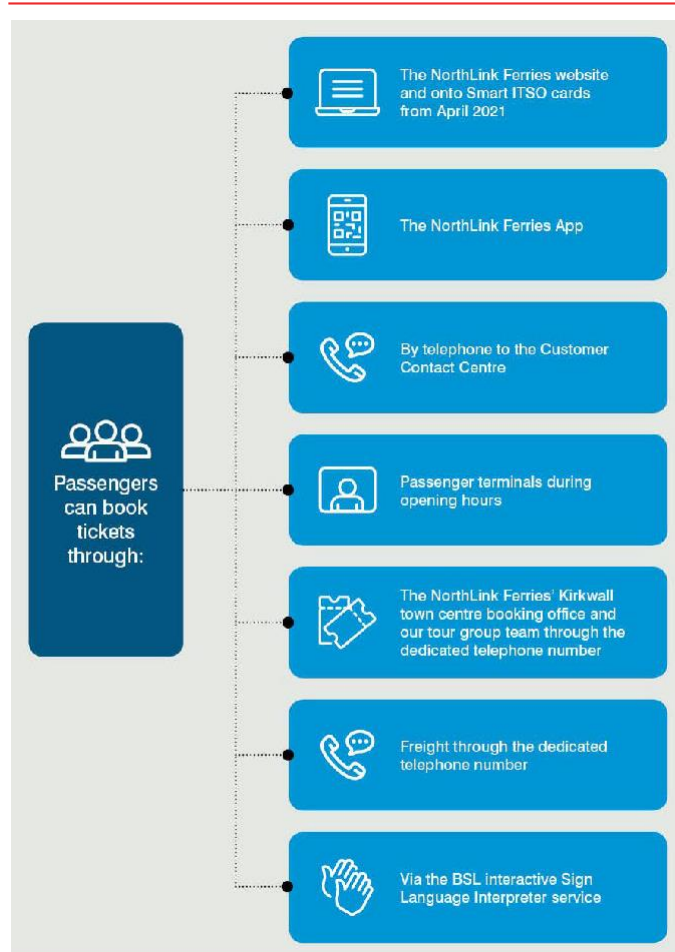


Figure 29: Ferry tickets through multiple channels

As travel booking behaviours have evolved, Serco has remained at the forefront of technological developments by regularly improving the booking functionality of the NorthLink website and through the introduction of our new app in 2018 enabling our customers to plan, book and confirm their journey in a matter of taps.

Digital technology has played an increasingly important role in driving ticket sales for the Northern Isles Ferry Service and, in line with broader consumer trends, we have witnessed a significant upsurge of customers using digital channels for researching travel options available to them, making online bookings and engaging with us online. Redacted

Redacted

Redacted

5.2.1. Serco's booking system for NorthLink

Redacted

The end-to-end reservation tool incorporates passenger and freight bookings, additional information regarding passenger needs and requests, named passenger manifests, cash and card payments, invoicing, check-in and embarkation and inventoried items, Redacted Redacted

Figure 30 shows the popularity of online booking.

Redacted

Figure 30: Pie chart illustrating break down of non-islander visitor booking channels 2017 and 2018

Redacted

5.2.2. NorthLink Website

NorthLink's main passenger website at www.northlinkferries.co.uk, our freight website at freight.northlinkferries.co.uk and travel trade website at grouptours.northlinkferries.co.uk (shown in Figure 31) offer an easy-to-use online booking facility as well as providing comprehensive sources of information for all our customer segments seeking to use the ferry services Serco provides. Timetables, contact information for help and support, and our early warning noticeboard are accessed from the home page (see section 5.2.10.1), as well as a dedicated sector page for island communities.

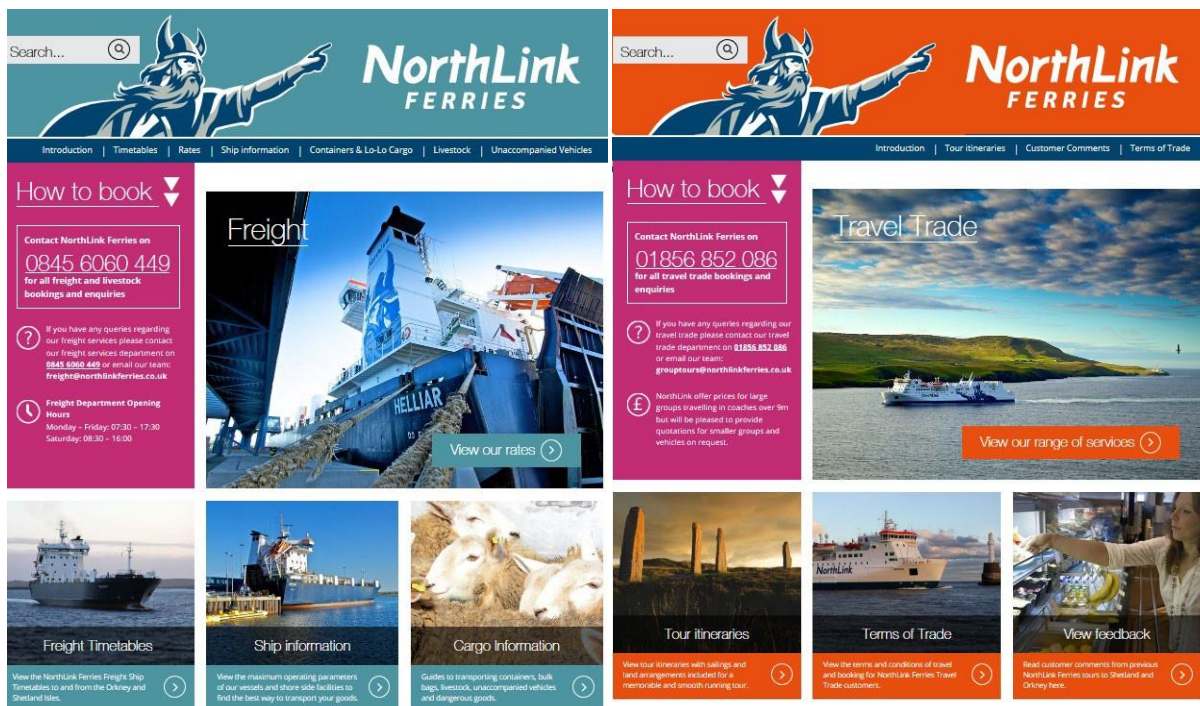


Figure 31: Home page from NorthLink freight website and Home page from NorthLink travel trade website

Table 8 details the scope of the website content provided for each of our defined customer segments as well as mechanisms for encouraging customer feedback.

Table 8: Centralised information provided online for all customer segments via the NorthLink websites

Passenger website information		
<ul style="list-style-type: none"> • Timetables • Fares • Operational updates • Routes • Ports • Cabin information • Top tips for travel • Prohibited items • Dive equipment policy • Online booking information and answers to common questions • NorthLink app information • Check-in and boarding information • Special offers including those with transport providers such as ScotRail and Citylink • Google street view video tours onboard vessels and at ferry terminals to assist visualisation • Accommodation information • Details of on-board entertainment, facilities for adults and children, and celebration packages 	<ul style="list-style-type: none"> • Accessibility options • Information for travelling with pets • Tourist information and business directories for Orkney, Shetland, Aberdeen and Caithness • Invitation to receive a regular monthly e-newsletter and option to unsubscribe • Office Opening Times • NorthLink news page with video links • Terms and conditions of carriage • Link to Transport Scotland’s website for ferry services governance and information • Accessibility Policy, published newsletters and Passenger Welfare Guide • Videos • Gift vouchers • Job opportunities • Realtime locations of passenger ships • Contact information and customer feedback form 	
Islander website information	Freight customer website information	Travel trade website information
<ul style="list-style-type: none"> • Islander ferry fares • Registration process • Prize draws • Top travel tips • Family and friends discount • Local sponsorship application information 	<ul style="list-style-type: none"> • Timetables • Rates • Ship information • Freight ship menu • Realtime locations of freight ships • Terms and conditions • Cargo information: <ul style="list-style-type: none"> ○ Containers & LoLo cargo ○ Livestock ○ Unaccompanied vehicles ○ Dangerous goods ○ Safety at sea and ashore: ○ Plug-in guidance notes ○ Securing cargo and lashing guidelines 	<ul style="list-style-type: none"> • Introduction • Customer comments • Terms of trade • Options for tour itineraries for Orkney and Shetland • Tourist information for Shetland and Orkney

Having reviewed the current, online booking process using the NorthLink website, we will further enhance and improve online booking functionality, as well as delivering increased operational efficiency by:

Redacted

Redacted

Redacted

An example creative concept is shown in Figure 32.

Redacted

Figure 32: Creative concept for offers and updates app screen and example marketing message screen for re-targeting prospective customers

Redacted

5.2.3. Implementing live chat to further engage with our customers

For the new contract, our web-based booking process will be further enhanced with the inclusion of a 'chat' facility to enable potential customers to get immediate answers to questions by engaging with our team, an example of which is shown in Figure 33. Live Chat will be available during the extended opening times of the contact centre, via dedicated online text boxes during the information gathering or booking stage of our customers' online experience. Redacted

Redacted

Live chat will deliver the following benefits for customers and our operations:

- Provide immediate, streamlined customer support
- Improve customer response rates, leading to greater satisfaction to encourage sales and prevent any potential abandonment of sales transactions
- Live chat will also lead to increased efficiency in our customer service levels provided by the contact centre

Redacted

Figure 33: Screen example of live chat provision from our Edinburgh Cycles Contract

5.2.4. Promoting our NorthLink App

Serco will continue to promote the NorthLink booking app through marketing and communication activities and supporting collaterals. In addition to providing travel updates and twitter feeds, we will enable customers to access the 'chat' facility via the app, to support them in completing the booking process and provide timely responses to any specific queries.

Now available for smartphone and tablet users, whether they are regular travellers or first-time visitors, the NorthLink app, launched last year, represents a new and additional medium for viewing timetables and purchasing tickets either as a guest or with their NorthLink ID account, shown in Figure 34.

Redacted

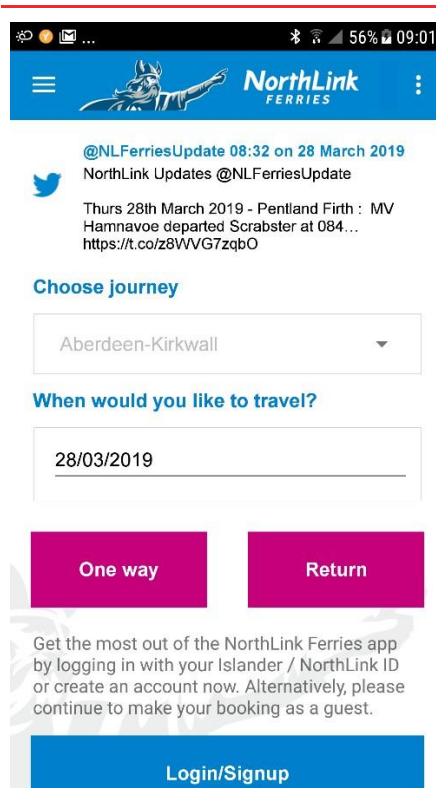


Figure 34: Front screen of the NorthLink app

5.2.5. Telephone bookings and reservations

The Customer Contact Centre based in Stromness will continue to receive telephone reservation requests. Currently available from 08 00 to 20 00. From July 2020, we will extend this service provision for the new contract from 05.30 to midnight, in accordance with Table 9, with calls answered by terminal teams in Stromness and Hatston.

Table 9: Revised contact centre opening times for the new Contract

	April to October (inclusive)
Monday to Friday	05 30–24 00
Saturday and Sunday	08 00–24 00 (note w/e Hamnavoe sails at 09.00)
	November to March (inclusive)
Monday and Tuesday	05 30–20 00 (No evening arrivals into Hatston)
Wednesday to Friday	05 30–24 00
Saturday and Sunday	08 00–24 00

The call handling service will also incorporate the live chat facility described in section 5.2.3 to assist in converting enquiries to sales.

Redacted

5.2.6. Reservations at Passenger terminals

All passenger terminals and Kirkwall town centre booking office will continue to take reservations for those who wish to make them face to face. Currently the office at Kirkwall is open 09 00 to 17 00 Monday to Friday, while the ports are generally open longer, e.g. Stromness is open from 5 15 to 16 45, and again from 20 30 to midnight. The Scrabster office is open during check-in times for the Hamnavoe.

5.2.7. Arrangements with local outlets and travel agents

As for the existing contract, Serco will continue to:

- Support the travel trade through existing customer relationship management
- Supply tickets to travel agents and local outlets on request
- Offer rail and sail tickets purchased in conjunction with rail operators
- Sell onward travel tickets in Aberdeen and Aberdeenshire using the Grasshopper ticket system

Serco concentrates our efforts on retailing tickets directly to customers, wherever possible. The rationale behind this approach is that it ensures all elements of our service with the potential to impact on the customer experience and our high standards remain within our control.

5.2.8. Serco's Smart ticketing solution

In response to Transport Scotland requirements Serco's Smart ticketing solution will enable foot passengers with concession entitlements to load purchased tickets for travel onto smartcards at departure ports. These will then be validated and reconciled with our booking and reservation system when boarding to create the vessel manifest. Redacted

Full details of our Smart Ticketing proposals are provided in Section MS3 of this Marketing and Sales Delivery Plan.

5.2.9. Ensuring accessibility for all

To assist customer accessibility and wayfinding for those travelling to ferry terminals for onward ferry travel, the NorthLink website is directly linked with Google maps. We currently provide video street view tours of vessels and ferry terminals and will offer further opportunities for customers to view these video sequences when making reservations. Redacted

For the new Contract, Serco will provide website pages detailing services available at each ferry terminal, such as television screenings of live news, passenger information screens, onward travel information screens, information boards and leaflets, local interest magazines and Wi-Fi

access. Additional information available from the website to aid journey planning and accessibility includes:

- Ferry terminal address details
- Parking information
- Terminal opening hours
- Terminal and vessel facilities, including those for people with disabilities
- Check-in times
- Travel distances and details of onward travel providers including sea, air, bus operators with links to their websites
- A contact telephone number for assistance with accessibility needs
- Details of our Accessibility Policy and methodology for ensuring the provision of excellent accessibility for customers

Redacted

(as shown in Figure 35), Redacted

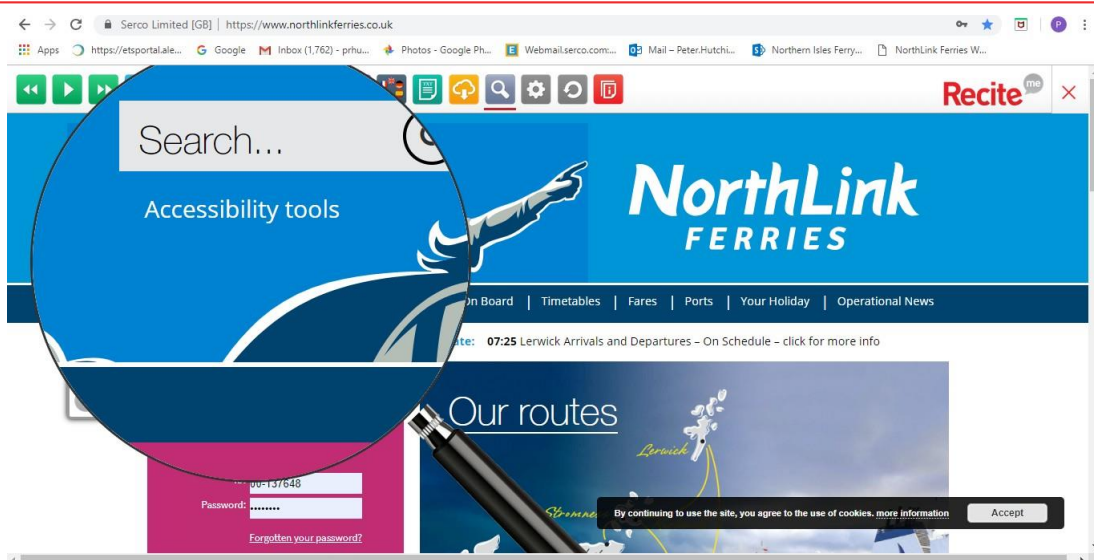


Figure 35: Recite Me accessibility tool bar applied to the existing NorthLink website

We will work with all parties with an interest in providing accessible travel to and from the Northern Isles including to the port and from the port after sailing. Redacted

Redacted

Serco will continue to provide relevant content regarding NorthLink services for www.euansguide.com site visitors, a valuable resource for those travelling with a disability. The website also features traveller experiences and reviews, some of which are featured in Figure 36.

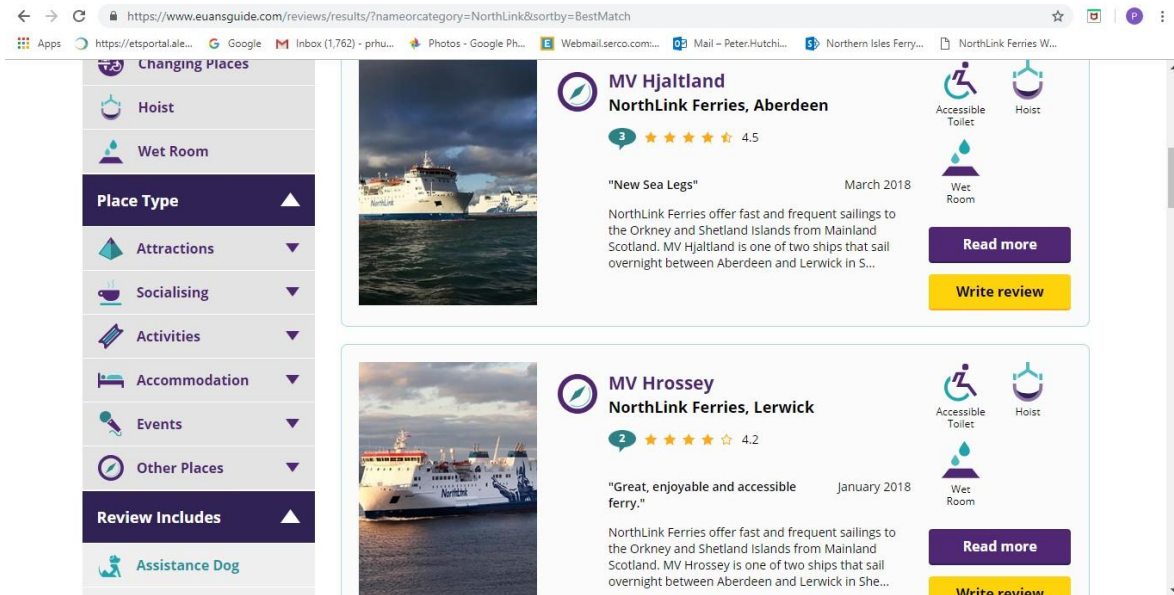


Figure 36: NorthLink services reviews featured on Euan's Guide.com

To improve access and the user experience for our customers with hearing difficulties, Serco has teamed up with a sign language interpreting agency. Our new Sign Solutions Redacted service will enable customers with hearing impairment to communicate more easily when making calls to NorthLink's customer service department via an interpreter who will relay conversations using British Sign Language. The service will be able to be used for responding to booking queries or questions about the on-board offering.

Through successful delivery of the existing Northern Isles Ferry Service Contract, Serco has existing infrastructure already in place designed to deliver a high quality of customer service support for people with disabilities and passengers who are in their later years.

We are currently installing Redacted technology that will enable passengers with reduced mobility and hidden disabilities to personalise and request assistance from our Customer Services Team in advance of arriving at our terminal buildings via an app. This tool will aid ongoing communication and tailored assistance.

Building on our existing capability we will ensure all customer-facing personnel are trained in the Scottish Government recognised World Host customer service training programme, Disabilities awareness training. This will enable them to identify additional areas where we can offer communication and information assistance to this customer segment and the elderly. We will also work closely with the Mobility and Access Committee for Scotland (MACS) and Scottish Accessible Transport Alliance (SATA) to support our achievement of an exemplary standard in assisting passengers travelling with accessibility needs.

In the event of travel delay or cancellation, our Passenger Welfare Guide as shown in Figure 37 is available online and at ferry terminals, providing detailed information about passenger rights and how to claim compensation.

5.2.10. Real-time information provision and early warning notification

Dissemination of real-time information relating to NorthLink service provision across our routes will continue to be managed through Serco's central information system, based from our harbourside office in Stromness. This covers online communication, passenger information at terminal buildings and on-board vessels, as well as protocols for managing central communication with relevant stakeholders in the event of service disruption.

5.2.10.1. Online information

Ferry service updates will continue to be at the top of the home page of NorthLink's website and app, with early warning notifications appearing in red, if sailings are predicted to be affected by disruption, as shown below in Figure 38. Inclusion of the online 'chat' facility for the new contract will enable customers to get answers to questions in real time by engaging with our team.



Figure 37: Front cover of NorthLink's Passenger Welfare Guide

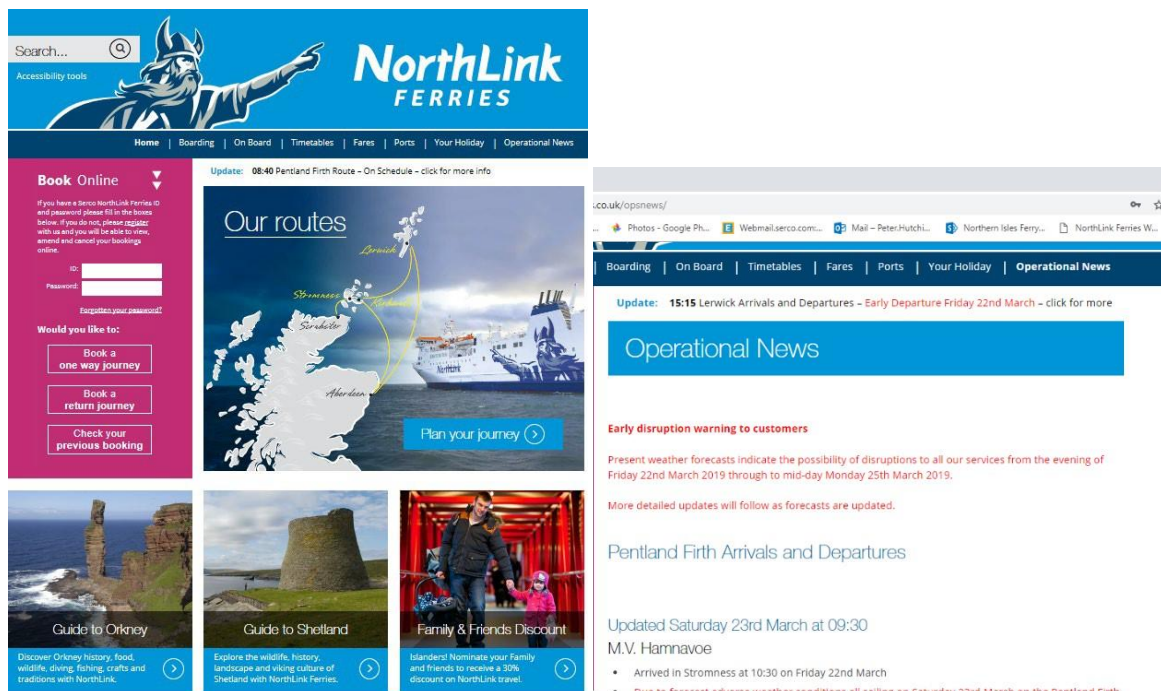


Figure 38: Home page of NorthLink Passenger website featuring service updates and detail of service disruption, highlighted in red

Twitter and Facebook feeds will also keep local communities, visitors and freight companies updated of any possible travel disruption; an example of which is shown in Figure 39.

5.2.10.2. Harbour marshalling areas, offices, waiting rooms and vessels

Dedicated outdoor digital signage Redacted will continue to be used in harbour marshalling areas to keep customers informed of timetabled sailings and/or delays. These will be updated locally by personnel based at ferry terminals.

In addition to customer services staff assistance, on arrival at ferry terminal buildings and on-board vessels, Serco currently provides information screens for passengers, featuring travel updates and information about our services on-board vessels. For the new contract, we will install separate, dedicated Travel Information Screens. This measure will provide an early warning Notice Board of any sailings under review as well as travel updates for air, rail, road and bus connections, to ensure passengers remain well informed and to provide support for decision-making should it be necessary for them to change pre-existing travel plans at short notice.

Meanwhile, our existing passenger information screens will be used for marketing messages and providing details about the location and availability of facilities and services on-board vessels, as well as things to see and do, such as movie screenings, themed activities for children or information about species of wildlife that can potentially be spotted from outside decks.

Additional, real-time information is also provided locally through terminal building announcements, such as boarding procedures and on-board vessels. As per our current standard practice and to comply with maritime law, on embarkation of our vessels, all passengers will continue to receive safety announcements from each of the vessels, in addition to details of our evacuation procedure and use of low level lighting. During the voyage, passengers will also receive the following announcements:

- Availability of facilities on board each vessel.
- Notification of remaining time of one hour prior to arrival at harbour destinations
- Disembarkation procedure
- Opening times for breakfast served on-board and information supporting onward travel arrangements

In 2018, school children from Shetland and Orkney recorded safety announcements for NorthLink vessels to commemorate the Year of Young People, as shown in Figure 40.



Figure 39: Social media posting warning of ferry service disruption

Redacted

Figure 40: School children from Shetland and Orkney recording safety announcements for NorthLink in 2018

5.2.10.3. Road and public transport information systems

Serco will provide real-time information relating to our sailing schedule to the following road and public transport information systems:

Redacted

We will also ensure mainland hospitals and health clinics are informed of updates to our sailing schedule so that they remain well informed of islander attendance of clinics and hospital appointments.

ZetTrans in Shetland is currently placing interactive transport information screens at NorthLink's Lerwick terminal and elsewhere on the island, where latest ferry sailing information will be available.

5.2.10.4. Arrangements for responding to sailing disruption

Serco will make weather-related amendments to the sailing schedule when necessary in the interests of passenger and crew safety and will follow our existing, proven communication procedure:

- Redacted will monitor the weather forecasts for the preceding week and confirm to the Redacted when a sailing has the potential for a revised sailing or arrival time and where it is cancelled.
- Wherever possible, a daily sailing will be maintained by an earlier or later departure if weather conditions preclude sailing at the scheduled time.
- Our Redacted will update representatives of the Transport Scotland Ferries Division, particularly, with any amendment to service as the decision is received from the vessel. This will enable the Scottish Government’s Resilience Room to be advised where there is a significant weather impact across the country.
- Redacted will authorise an Operations Update that will be emailed to a defined recipient list, including NorthLink personnel, key freight and livestock customers, local and national media and key stakeholders, such as the harbour authorities and key daily suppliers.
- The NorthLink website, app and social media will be updated each morning and revised throughout the day with the current sailing status, providing a central reference point for car and foot passengers, freight and livestock customers and group travel organisers from the travel trade.
- In the event of sailing disruption, all relevant local and national broadcast media channels, key customers, all NorthLink staff and stakeholders with an interest in the vessel sailing pattern for the next 24 hours will be updated with latest sailing status information Redacted Information provided will include the reason for the delay or cancellation as well as information regarding the resumption of service following an interruption. Table 10 describes how we manage service disruption in more detail.
- We will further enhance our communications as part of the introduction of the new NorthLink Redacted system by pre-advising passengers directly of any disruption affecting a booking made Redacted
- Passengers with reservations on a specific sailing affected by a departure amendment will be contacted directly via SMS messaging, followed up by a phone call by a member of staff from the port of departure to ensure that alternative travel arrangements can be made as soon as any disruption is known. The Serco team will make every effort to resolve any travel disruption including liaising with other transport operators to ensure connectivity can be maintained.
- In the event of a cancelled sailing, affected passengers will be provided with all assistance possible to minimise the disruption. Our staff will be proactive in contacting all passengers booked onto the related sailing offering support and suggestions to minimise the effect that a cancelled or diverted sailing could have.

Table 10: Central Information System for managing service disruption

	Normal Operations	Sailings under review	Actual cancellation
Redacted			

Redacted

Having assessed the challenges relating to high volume movements of cattle and sheep from the islands, particularly during the livestock season in September and October, we will maintain early discussions with those customers transporting livestock regarding any potential weather disruption, especially when the local marts have sales and require transportation from the islands. Our ^{Redacted} Manager will be in regular contact with all customers to maintain this vital economic service NorthLink provides for the local farming communities.

6. Smart Ticketing for NorthLink Ferries – MS3

6.1. Introduction

Our objective is that NorthLink plays its role in delivering The Scottish Ministers' vision, that:

'All journeys on Scotland's bus, rail, ferry, subway and tram networks can be accessed using some form of Smart ticketing or payment.'

Our aim is for our proposals to deliver in a manner that is relevant and adds value for customers of NorthLink. Smart Ticketing provides an opportunity to take a fresh look at how products are retailed, purchased and fulfilled. It is also viewed as a catalyst to invest in new systems and technologies to enable Smart Ticketing to be integrated seamlessly into the NorthLink service

and to provide a roadmap to deliver longer term benefit for most customers on the service ^{Redacted}

6.1.1. Serco's NorthLink journey to date

The priority in the existing contract has been to deliver a stable booking and reservations scheme; however, we support the increasing business and public demand for Smart Ticketing and actively engage with Transport Scotland (TS) and other public transport operators on industry developments. As a member of the TS Operator Steering Group, we have followed closely the progress of other Smart Ticketing developments in Scotland and support the aspirations of the Scottish Government in the Smart Strategy paper, published by TS in 2018.

In our Caledonian Sleeper rail franchise, ITSO Smart Ticketing is already used for our walk-on passengers using a solution delivered in close cooperation with ScotRail. Redacted

6.2. Approach to Smart Ticketing

As technology changes, so do customer behaviours. The advent of Smart Ticketing is just one example of how technology is making customers' lives easier and Serco is committed to supporting the integration of Smart Ticketing.

The last 10 years has seen a revolution in the use of Smart Ticketing across all modes of public transport, including ferries. TS wants to ensure that Scottish citizens can take full advantage of the work done to date and build and adapt to the new approaches as they appear. We are aware of the challenges that have occurred in Smart Ticketing development and implementation, and our approach is to build on the lessons learned in conjunction with TS and operators of schemes in Scotland and the UK.

Serco has been introducing better customer-oriented services since winning the NorthLink contract in 2012. This has been achieved by making improvements in stages, working and communicating with our customers and communities, and thorough testing. This approach is to be continued for the introduction of Smart Ticketing for this tender submission.

Our vision is to improve all aspects of the customer journey, from booking to travelling, through the integration of Smart Ticketing with our booking and reservations platform. Technology and opportunity will continue to develop, so from conceptual design it is imperative that we commit to the right solution, supported by experienced and reliable partners.

Redacted

The NorthLink approach underpins the core aspiration of TS to:

- Use Smart Ticketing to validate concession entitlements of foot passengers
- Provide a route to move to digital delivery of islander concessions, rather than current printed vouchers (a cost saving)
- Move a further step towards interoperability across Scotland's transport networks

Serco supports the ambition of the Scottish Government to integrate Smart Ticketing for the benefit of customers. Smart and integrated ticketing enables a greater use of public transport and for customers to move between modes easily and efficiently. Its application to NorthLink can clearly assist the foot passenger and the interoperability between transport modes.

6.2.1. Market size for Smart Ticketing on NorthLink

The foot passenger market on NorthLink is relatively small in public transport terms:

Redacted

Redacted

Figure 41: Foot passenger ticket sales on NorthLink, 2014–18

By comparison with other modes, where simple ticketed travel is the norm, Office of Rail and Road (ORR) data indicates ScotRail passengers made 94.2m journeys in the year 2016–17 and over 400m journeys were made by bus in Scotland during the same period.

6.2.2. NorthLink's Booking and Reservation platform and maritime compliance

The current NorthLink booking and reservation system described in MS2, into which Smart Ticketing must be integrated, is optimised to sell aggregated and complex products into a single and simple transaction for the customer. This transaction may include a cabin, pod seat or shower, where access to those facilities is via the passenger's printed ticket. The ticket includes a magnetic stripe that is coded to access locks on the vessel, i.e. the specific booked cabin door, pods or the shower rooms.

The current booking and reservation system is designed to ensure efficient boarding and be compliant with Maritime and Coastguard Agency (MCA) regulations, including the requirement to produce a full passenger manifest before a passenger vessel can legally depart port.

It is recognised that the **new Smart Ticketing process has to be configured to enable passengers boarding** the vessel to be validated in the booking and reservation system. This will ensure the manifest is produced without additional processes risking delay or confusion for staff and passengers. A passenger cannot board the vessel and sail without a record of that activity being generated and validated in the NorthLink reservation system, regardless of where they purchased their ticket or the form of media on which it is held.

6.2.3. Integration of ITSO Smart Ticketing on the NorthLink service to add passenger benefit

ITSO Smart Ticketing systems are designed for passenger ticket-only schemes with no complex add-on products. The National Entitlement card (NEC) is used for travel as well local council purposes including library and leisure centre use. Its use for travel includes commercial products, concessionary products and age or ability-based discount. It is possible to configure smart media for ITSO and non-ITSO applications on the same media, and this ability has long term relevance to our solution where additional benefit can be achieved for the traveller.

Serco has developed a scheme design for an ITSO Smart Ticketing solution which aims to deliver Scottish Ministers' objectives Redacted

as shown in Figure 42.

Redacted

Figure 42: Technology supported customer journey

6.2.4. Solution design using expert partners

Serco has worked closely with its experienced technology partners and experts including, Redacted to develop a Smart Ticketing solution that delivers an attractive proposition for customers and provides the basis for more sophisticated deployment of technologies and approaches in the longer term. The primary roles of our technology partners are:

Redacted

Redacted

6.3. Proposals for Smart Ticketing

Serco has described in the previous sections the background and considerations that have influenced the development of our proposal. This section describes in more detail the main components, how we will ensure successful delivery against the deadlines in the ITT and our own ideas for providing value add to the NorthLink service. We will describe the implementation timeline and the initiatives to drive take-up of Smart Ticketing amongst our existing foot passengers Redacted

In this section we set out our proposal that includes:

- Our technical solution
- Implementation timeline
- Initiatives to target existing foot passengers and attract new ones
- Barriers, actual or perceived, to Smart uptake

Our technical compliance is summarised in Table 11.

Table 11: Compliance table summarising technical solutions

Requirement	Solution Compliance
ITSO 2.1.4 compliant	Yes
Uses TS ITSO back office infrastructure, Host Operator or Processing System (HOPS) and Card Management System (CMS)	Yes
Supports Mandatory Discounts	Yes

6.3.1. Conceptual design for Smart Ticketing

The design has been developed to suit the requirements and expectations of the NorthLink customer and in the implementation of the NorthLink service. We have given ourselves the best chance for Smart Ticketing to be successful, because our solution is designed to fit the service, rather than the service be modified to fit any limitations imposed by Smart Ticketing.

Redacted

Tickets delivered to Smart will be routed via the TS Host Operator or Processing System (HOPS) to validate concessions and be made available to customers using Redacted technology that allow for ticket collection and validation.

Redacted

Redacted

Figure 43: Conceptual schematic of our Smart Ticketing solution

6.3.2. The ITSO Smart Ticketing Platform – System Components

Figure 43 provides the conceptual design that will be delivered by the core system components we will implement. These are shown in Figure 44 and are explained below.

Redacted

Figure 44: System hierarchy from customer interface

Redacted

Redacted

6.3.2.4. Transport Scotland: HOPS and CMS

The ITT requires that the basic ITSO processing functionality of the HOPS and CMS will be supplied by TS and their contracted provider. All ITSO transactions will pass through this processing architecture before Smart Tickets can be issued to customer media, so there is a critical dependency on TS for the integrity and performance of the solution, and in the achievement of reaching the milestones set out in the ITT.

The HOPS and CMS service is specified and defined by TS, and its technical delivery is by their contracted technical solution provider. We note that the existing HOPS and CMS will be re-rendered during the new NorthLink contract and that the procurement will ensure that the requirements in the NorthLink ITT are met.

We therefore assume that:

- The specification of the capabilities and services of the new solution TS will procure are adequate to ensure our solution interfaces effectively to enable our solution to work
- The timescale of this tender and any transition from the existing solution to a new solution is compatible with our plan and the ITT milestones
- The new ITSO solution will still be provided at no cost and there will be no supplemental cost from the new ITSO solution to NorthLink related to integration, testing, configuration or ongoing support
- TS will require the contract, with its new provider, guarantees service performance through an enforceable Service Level Agreement (SLA) for availability, uptime and processing benchmarks that are commercially competitive. Given the critical dependency on the HOPS back office processing, Serco will require these SLAs to be contracted between TS and NorthLink, as supplier-customer.

6.3.2.5. ITSO functionality

We have set out the system architecture from an ITSO functionality perspective in Figure 45.

Redacted

This solution is capable of being configured to support current and future concessionary schemes.

Redacted

Figure 45: System architecture from ITSO functionality perspective

6.3.3. The ITSO Smart Ticketing Platform – Customer Retailing

Redacted

6.3.4. The ITSO Smart Ticketing Platform – Hardware

Our solution requires relatively little new physical fixed hardware to be installed. The bulk of the Smart Ticketing project will be in configuring and integrating systems and data processing workflows. Hardware will be limited to:

- Smart Ticket retail point of sale and collection
- Validation devices

6.3.4.1. Smart Ticket retail point of sale and collection

Redacted

Redacted

6.3.4.2. Validation devices

Redacted

6.3.5. Cards and card management

We will encourage the use of existing ITSO smart cards by customers, recognising that the point of ITSO is for one media to carry many products, not to fill wallets with many different operators' cards all with similar functionality. We anticipate that many customers will already hold one of:

- National Entitlement Card (NEC)
- ScotRail SmartCard
- Other transport operators ITSO smart cards

To accommodate foot passengers who do not already have an ITSO smart card, such as the many UK domestic and international visitors to Orkney and Shetland that make up a significant proportion of summertime demand, we will explore the use of issuing either an NEC card (branded as the Saltirecard, but with some NorthLink sub-branding) or single-use smart card, using the TS CMS.

The use of the NEC card does offer the option to hold other non ITSO products applicable for the ferry services not currently provided through ITSO.

Redacted

NorthLink has introduced several technology improvements in the current contract and will continue to consider the adoption of digital technologies to improve the customer experience. This will include Smart Ticketing led improvement to the website and updated mobile and tablet-based apps. Increasingly, customers expect to be able to transact with service providers using technology, including WebChat for providing customer support when adopting new solutions like Smart Ticketing.

6.3.6. Integration and configuration activities

Redacted

6.3.6.1. Related systems

Redacted

6.3.7. Future proofing the solution

Our core solution is designed to be compliant with the ITT requirements, but Serco is mindful that investment in Smart Ticketing should consider this immediate requirement Redacted

Redacted

Our solution creates a solid base for future investment to achieve these outcomes. Our solution development path is shown in Figure 46.

Redacted

Figure 46: Solution development path

Redacted

6.3.8. Infrastructure

In this section we discuss the infrastructure requirements of our solution. This is shown in Figure 47.

Redacted

Figure 47: Integrated Smart Ticketing and CRM solution

6.3.8.1. Digital web platform

Redacted

6.3.8.3. Integration approach

Redacted

6.3.8.4. Commercial agreements with other operators to recognise their products

To support the commercial interoperability of ITSO with other operators we will seek to negotiate agreements with them as the demand from customers grow. We would look to the Operators' Group convened by TS to enable the best practice approach for this. Interchange of ITSO data between schemes will require close collaboration between TS, NorthLink and the other transport operators.

6.3.8.5. Validators and other customer interfaces

Redacted

6.3.8.6. Communications networks

Redacted

6.3.8.7. Mobile-based apps

Redacted

shown in Figure 48.

example



Figure 48: Young Scot national entitlement card and ITSO enabled app

6.3.9. Customer journey, experience and risk

6.3.9.1. Adding value to the customer experience

In the current contract NorthLink has developed a strong customer ethic with the introduction of a range of improvements. This plan will continue this progress by adopting digital technologies for the customer experience Redacted

Integrating these developments with our Smart Ticketing solution to streamline the process for customers to enquire, select, book and collect tickets will aim to further add value to a customer's experience.

6.3.9.2. Revenue and fraud protection

Redacted

6.3.10. Non-technical commercial agreements

To enable multi-operator interoperability for Smart Ticketing, we will co-operate to set up bilateral agreements with other operators, such as ScotRail, Stagecoach, Caledonian Sleeper and others, as the service develops. This process will be challenging but we will engage in these negotiations in good faith to achieve a good customer outcome.

6.3.11. Future flexibilities

The ultimate value from ITSO Smart Ticketing will come from ensuring the solution is designed to accommodate potential future needs and not 'lock' the solution into a limited number of purposes.

6.3.11.1. More complex products

While the requirement is to provide ITSO-based ticketing for foot passengers, Redacted

6.3.11.2. Mobile phone as media

The mobile is now well established to handle tickets, as a payment platform and an information or communications channel. There are several proven security measures that can be deployed to ensure integrity of the phone and ticket. Redacted

6.3.12. Development and implementation timeline

Redacted

Figure 49: Development and implementation timeline

6.3.13. Project Management

Drawing on Serco's broad experience in the delivery of change and technology projects, we will use Serco's tried-and-tested approach in managing the project. Serco will apply a well-defined programme management methodology using a combination of concepts and ideas based on Redacted approaches.

The benefits are as follows:

- Efficient and effective application of the methodology that adds value
- Designs and delivers coherent business change capability
- Aligns with corporate strategy
- Provides a mechanism to lead change
- Effective communication
- To learn from experience
- Clarity on ability to identify risks and make sure they are appropriately mitigated

We will approach project management from the perspectives of Redacted ensuring our partners follow a similar level of governance and reporting.

6.3.14. Resources

We will create a project team using resource from within Serco and externally, from our key suppliers and subject matter experts, to ensure the transition of Smart Ticketing into NorthLink Ferries.

Redacted

6.3.15. Risk and mitigations

As with any technology project, it is recognised that there are risks to implementation. We have captured the primary risks and our mitigations in Table 12.

Table 12: Risk and mitigations

Risk	Mitigation
------	------------

Redacted

Redacted

6.3.15.1. External Dependencies

There are several dependencies inherent in our solution that can impact on achieving contract milestones. Serco will use reasonable endeavours to manage the project to mitigate potential for delay; however, it is recognised that some critical deliverables are outside Serco's direct control. These include:

- TS, including timely agreement of our solution and the timely retendering and implementation of the new HOPS and CMS solution that is mandated

Redacted

- Other commercial transport operators, including their agreement and commitment to commercial terms to enable the retailing of each others' products

6.3.16. Working with other Smart Ticketing Providers and Stakeholders

We recognise the benefits that integrated ticketing across all transport modes is a key ambition of the Scottish Ministers and we will work collaboratively with other key stakeholders and operators, not just to support the marketing and awareness of Smart Ticketing, but to work together to create the right propositions and product offers, that will work seamlessly, through the Smart platform. We will discuss options with ScotRail and bus operators that help to provide an end to end journey experience for customers, with a Smart ticket being the platform. This will include existing products such as Spirit of Scotland or Highland Rover products. Redacted

6.3.17. Marketing and adoption campaigns

As referenced in MS1, our intention is to support the rollout of the Smart Ticketing project through a clear and effective marketing campaign. Our activity and initiatives will target foot passengers, as well as other relevant customers and stakeholders, with the overall ambition to drive adoption and usage of Smart Ticketing.

6.3.17.1. Marketing campaigns

Redacted

6.3.17.2. Key marketing channels

Redacted

, as shown in

Table 13.

Table 13: Key Marketing Channels

Key Marketing Channel	Summary
-----------------------	---------

Redacted

Redacted

6.3.18. Barriers, actual or perceived, to Smart uptake, their proposed solutions and their likely impact

Serco has taken an approach to Smart Ticketing that aims to leverage investments made in Scotland, to deliver capability that some customers will already be familiar with and potentially ones they are already using.

However, unless an operator removes entirely the option to use conventional ticketing media, the uptake of Smart Ticketing is entirely at the discretion of customers. Having a good understanding of the potential and perceived barriers to uptake, provides valuable insight into where effort should be placed in regard to customer reassurance, marketing and communication of the solution.

Table 14 collates potential barriers identified. Against each, we have set out high-level plans to mitigate these barriers.

Table 14: Barriers to uptake

Barriers to uptake	Proposed response and likely impact
--------------------	-------------------------------------

Redacted

Barriers to uptake

Proposed response and likely impact

Redacted

Table 15: Summary of Proposals for Marketing and Sales

Proposals	Timing and duration	Responsibility	Stakeholders involved	Assumptions/ dependencies	Method for measuring results
Contract Welcome Programme	Redacted				
Acquisition of CRM system, training and implementation					
SEO enhancement plan					
Timetable production					
Production of Northern Lights					
Customer Contact Centre Opening Hours extension					

Proposals

Timing and duration

Responsibility

Stakeholders involved

Assumptions/ dependencies

Method for measuring results

Engage with Local Car Hire Companies

Redacted

.....
Create a joint marketing campaign with Caledonian Sleeper

.....
Create an onboard 'show and tell' schedule

.....
Deliver targeted marketing communications plan

.....
Implementation of Smart Ticketing Programme

.....

Proposals	Timing and duration	Responsibility	Stakeholders involved	Assumptions/ dependencies	Method for measuring results
-----------	---------------------	----------------	-----------------------	---------------------------	------------------------------

Implementation of website enhancements and developments

Redacted

Actively promote the NorthLink customer app

Continue to service group travel trade through existing sales channels

Continue to provide accessibility software online

Provision of passenger welfare guide online and printed

Continue to provide real time travel information through all available channels

Improvements in wayfinding

Proposals	Timing and duration	Responsibility	Stakeholders involved	Assumptions/ dependencies	Method for measuring results
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Improved communications in port waiting rooms/on board vessels

Redacted

Shoulder Season marketing campaigns

Build partnership campaign plans

Marketing campaign to support Smart Ticketing

Supporting Green Travel initiatives

Itinerary-led marketing campaigns

Proposals Timing and duration Responsibility Stakeholders involved Assumptions/ dependencies Method for measuring results

Hosting events onboard vessels

Redacted

Local Sponsorship Panel

Provision of marketing support for Freight Management Team

Integrate Live Chat functionality in app and website

7. Monitoring and Review

As standard practice, Serco will use our established mechanisms for monitoring our Marketing and Sales Delivery Plan performance to identify any emerging issues so that they can be controlled in a timely manner to ensure we achieve our objectives.

Redacted

We have also created an evaluation framework (shown in Table 16) for the key marketing channels to assist with our performance monitoring and continuous improvement.

Table 16: Evaluation framework

Channel / platform	Activity	Indicators	Notes
Twitter	Redacted		

Facebook

Channel / platform	Activity	Indicators	Notes
Website	Redacted		
E-newsletter			
Magazine			
Media			
Events			
Digital advertising			

7.1. Reports

Serco confirms our commitment to adhere to all specified contract requirements in relation to reporting against Smart Ticketing milestones as detailed in Contract Agreement and Schedule 1, Section F and Schedule 13.

7.2. Continuous improvement

Serco confirms we will analyse all aspects associated with the implementation of this Marketing and Sales Delivery Plan. Our marketing planning process is directly aligned with our continuous improvement methodology. A full description of our approach to operational excellence through continuous improvement can be found in section OMS2 of our response B3, Operational Management System Delivery Plan.

We will also undertake the following activities:

Redacted

Appendix A5-1: UK visitor profiles, determined from research completed in 2018

Redacted

Appendix A5-2: Current macro environmental concerns, the influence they have on travelling behaviour, how they are currently addressed and marketing and communication opportunities

Redacted

Redacted

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