



Southeast Wisconsin Transit Marketing Non-Rider Study

Summary Presentation of Key Findings
from Final Report

Wisconsin Department of Transportation (WisDOT) 2006 Non-Rider Study

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Presentation Organization

- Study Background, Objectives and Methodology
- Functional Barriers
- Structural Barriers
- Personal Barriers
- Reaction to Service Changes
- Gas Price Analysis

Background and Objectives

- Background
- Past Research has shown:
 - 15% of the population are Non-Riders who have shown an openness toward future use
 - Barriers exist that keep some from using public transit.
 - Gasoline prices were near record levels in summer of 2006
 - Impact how people approach their transportation needs
- Objectives
 - Identify 3 types of ridership barriers and understand how they can be addressed
 - Functional Barriers: lack of knowledge of system, routes, schedules, fares
 - Structural Barriers: constraints of routes, schedules, unique needs
 - Personal Barriers: opinion-based obstacles
- Examine potential bus service changes and their impact on future ridership
- Explore the impact of higher gas prices on driving habits and future ridership

Research Methodology

- Respondents were recruited online from Harris Interactive’s online panel.
 - Targeted by ZIP codes of the Partnership’s six county transit systems.
- Data was collected online from September 18 – September 27, 2006.
- The survey length averaged 15 minutes
- A total of 985 completed surveys were obtained.
 - 234 Riders – Had used the bus in the past year.
 - 751 Non-Riders – Had not used the bus in the past year.
- Respondents met the following criteria to qualify for the study:
 - U.S. resident
 - Age 18 or older
 - Lives in Wisconsin
 - Lives in a qualifying zip code
- Data was weighted using demographic targets for Age, Income, Gender, Race, and Region.
 - Propensity weighting was applied to correct for differences between the online and offline populations.

Research Methodology

- Respondents were segmented into the following Ridership Groups:

Riders
Non-Riders

- Loyal Riders: Used bus in past year and intend to use bus at same or greater frequency in next year.
 - Vulnerable Riders: Used bus in past year and intend to use bus with less frequency in next year.
 - Potential Riders: Had not used bus in past year but intend to use bus in next year.
 - Strict Non-Riders: Had not used bus in past year and does not intend to use bus in next year.
- Counts for the Ridership Groups were as follows:
 - Loyal Riders – 180 completes
 - Vulnerable Riders – 54 completes
 - Potential Riders – 104 completes
 - Strict Non-Riders – 647 completes

Presentation Agenda

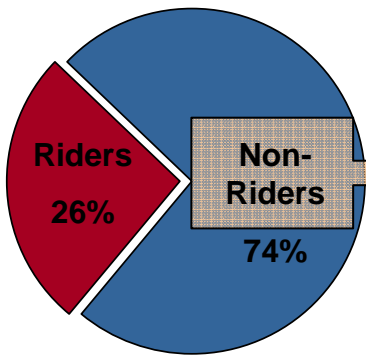
- Discuss the barriers to transit use
 - Identify key types of ridership barriers
 - Investigate how barriers affect likelihood to ride bus
- Looking at options
 - Examine potential bus service changes and their impact on future ridership
- Impact of gas prices on driving habits and future bus use

Presentation Organization

- Study Background, Objectives and Methodology
- Functional Barriers– lack of knowledge of bus services
- Structural Barriers
- Personal Barriers
- Reaction to Service Changes
- Gas Price Analysis

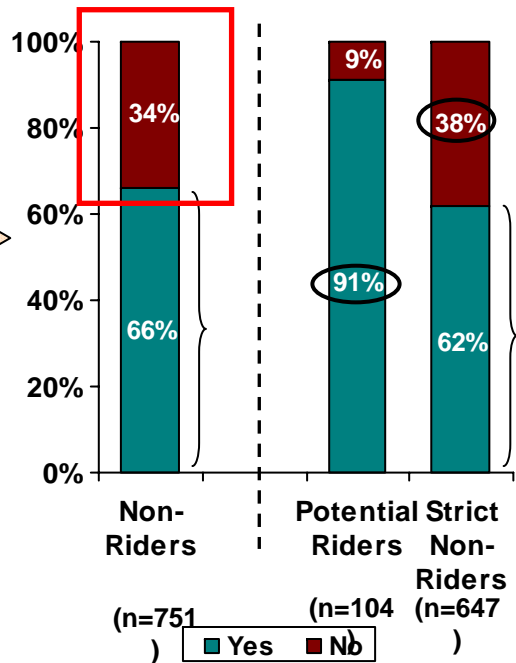
One-third of Non-Riders have never used the bus. Potential Riders are more likely to have used the bus in the past 2 years.

BUS RIDERSHIP

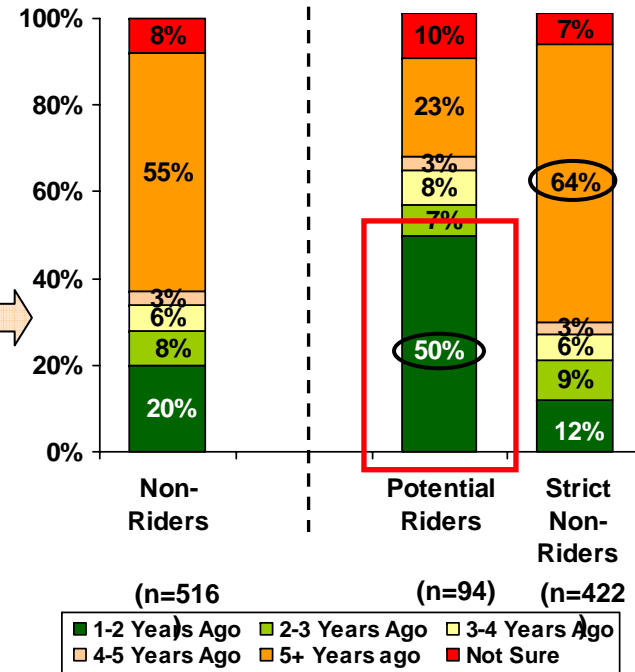


Base: Total sample (n=985)

Have You Ever Used the Bus? By Ridership Group



When You Last Rode the Bus By Ridership Group



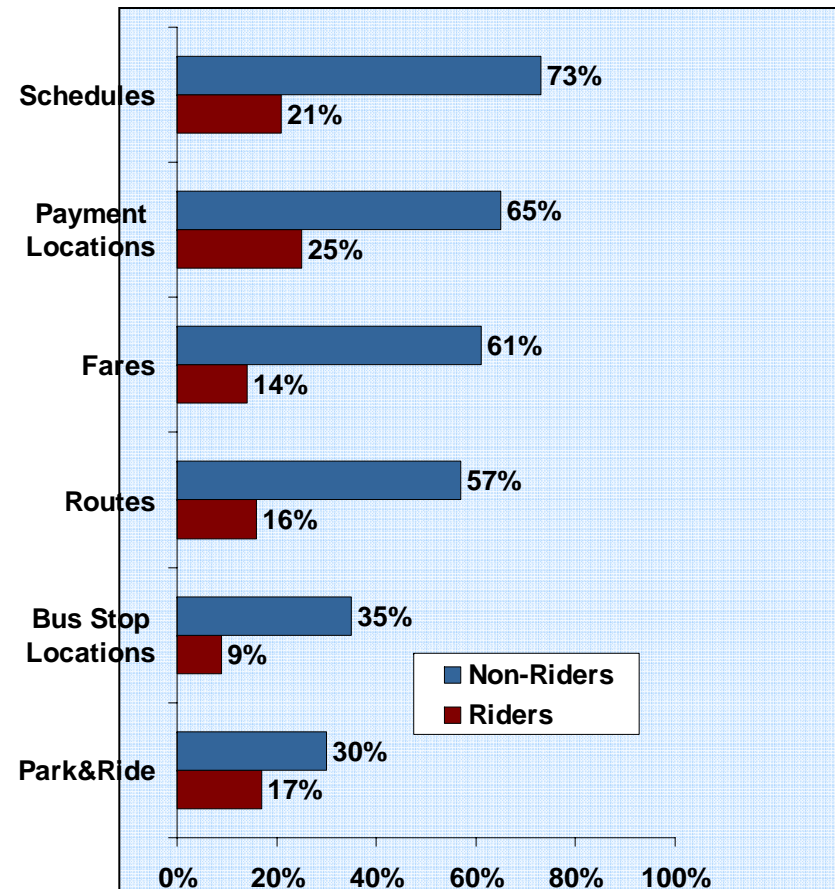
○ Indicates significant difference at 95% confidence level above uncircled rider group.

- Q450** Have you used the local public bus services in your home community in the past twelve months?
- Q540** Have you ever used the local public bus system?
- Q550** When was the last time you rode the local public bus system?

At least three in ten Non-Riders are not familiar with any bus feature.

Functional Barriers Knowledge Gap for Non-Riders

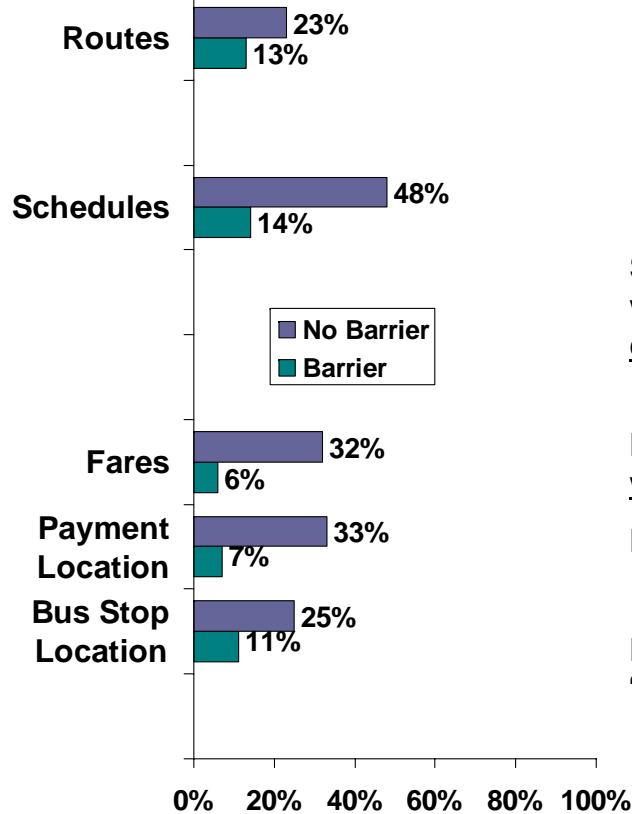
- Schedules: 73% are not familiar
 - Additional 53% not sure of earliest morning bus
 - Additional 56% not sure of latest evening bus
- **Payment Locations:** 65% are not familiar.
- **Fares:** 61% are not familiar
 - Additional 40% not sure of the cost of a one-way fare.
- **Routes:** 57% are not familiar
 - Additional 26% not sure about the existence of express routes near their home.
- **Bus Stop Locations:** 35% are unfamiliar.
 - Non-Riders report living and working further from stops than Riders (cannot confirm accuracy of these perceptions).
- **Park & Ride:** 30% are not familiar.



There is a relationship between knowledge of the features of the transit system and intent to use. Non-Riders with no functional barrier are more likely* to ride the bus in the next year.

Current Likelihood of Using Bus

(Top 4 Box – Extremely/Very Likely/Likely/Somewhat Likely)



Functional Barriers

Non-Riders

Barrier Definitions

Route Barrier = “Not at all familiar” with Bus Routes or “Not Sure” of whether there’s an express route connecting home to work

Schedule Barrier = “Not at all familiar” with Bus Schedules or “Not Sure” of weekday bus frequency, earliest bus on a weekday, latest bus on a weekend or comparison of weekend and weekday services.

Fare Barrier = “Not at all familiar” with Bus Fares or “Not Sure” of cost of a one-way bus ticket.

Payment Location Barrier = “Not at all familiar” with Bus Payment Locations.

Bus Stop Location Barrier = “Not at all familiar” with Bus Stop Locations or “Not Sure” of closest bus stop to home or work.

* Note: “Likely” is defined as respondents who said they were somewhat likely, likely, very likely or extremely likely to ride the bus.

Base: All Qualified Respondents

Q460 How likely are you to use the local public bus services in your home community in the next twelve months?

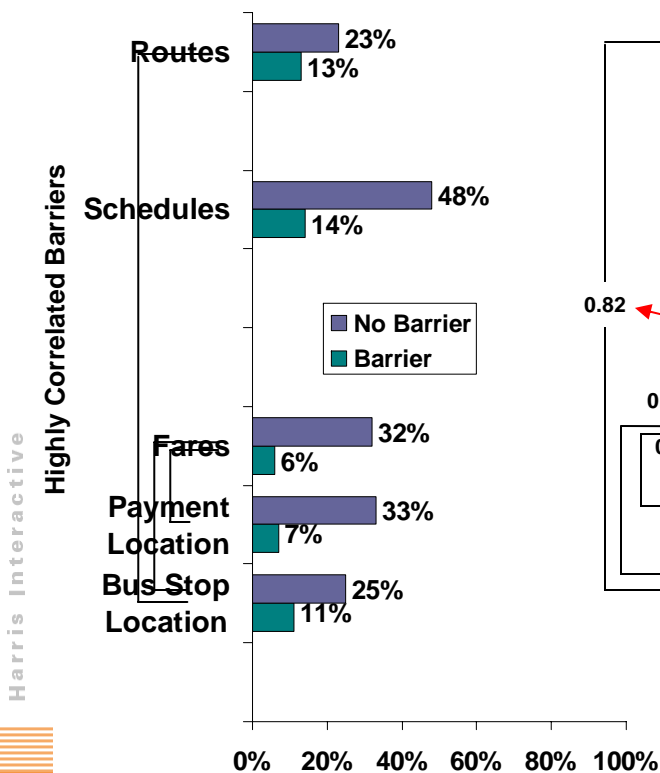
Since several functional barriers are highly correlated, addressing one barrier will help mitigate other barriers.

Functional Barriers Non-Riders

Current Likelihood of Using Bus

(Top 4 Box – Extremely/Very Likely/Likely/Somewhat Likely)

Barrier Definitions



Route Barrier = “Not at all familiar” with Bus Routes or “Not Sure” of whether there’s an express route connecting home to work

Schedule Barrier = “Not at all familiar” with Bus Schedules or “Not Sure” of weekday bus frequency, earliest bus on a weekday, latest bus on a weekend or comparison of weekend and weekday services.

0.82 **Correlation Coefficients**

0.74 **Fare Barrier** = “Not at all familiar” with Bus Fares or “Not Sure” of cost of a one-way bus ticket.

0.62 **Payment Location Barrier** = “Not at all familiar” with Bus Payment Locations.

Bus Stop Location Barrier = “Not at all familiar” with Bus Stop Locations or “Not Sure” of closest bus stop to home or work.

Base: All Qualified Respondents

Q460 How likely are you to use the local public bus services in your home community in the next twelve months?

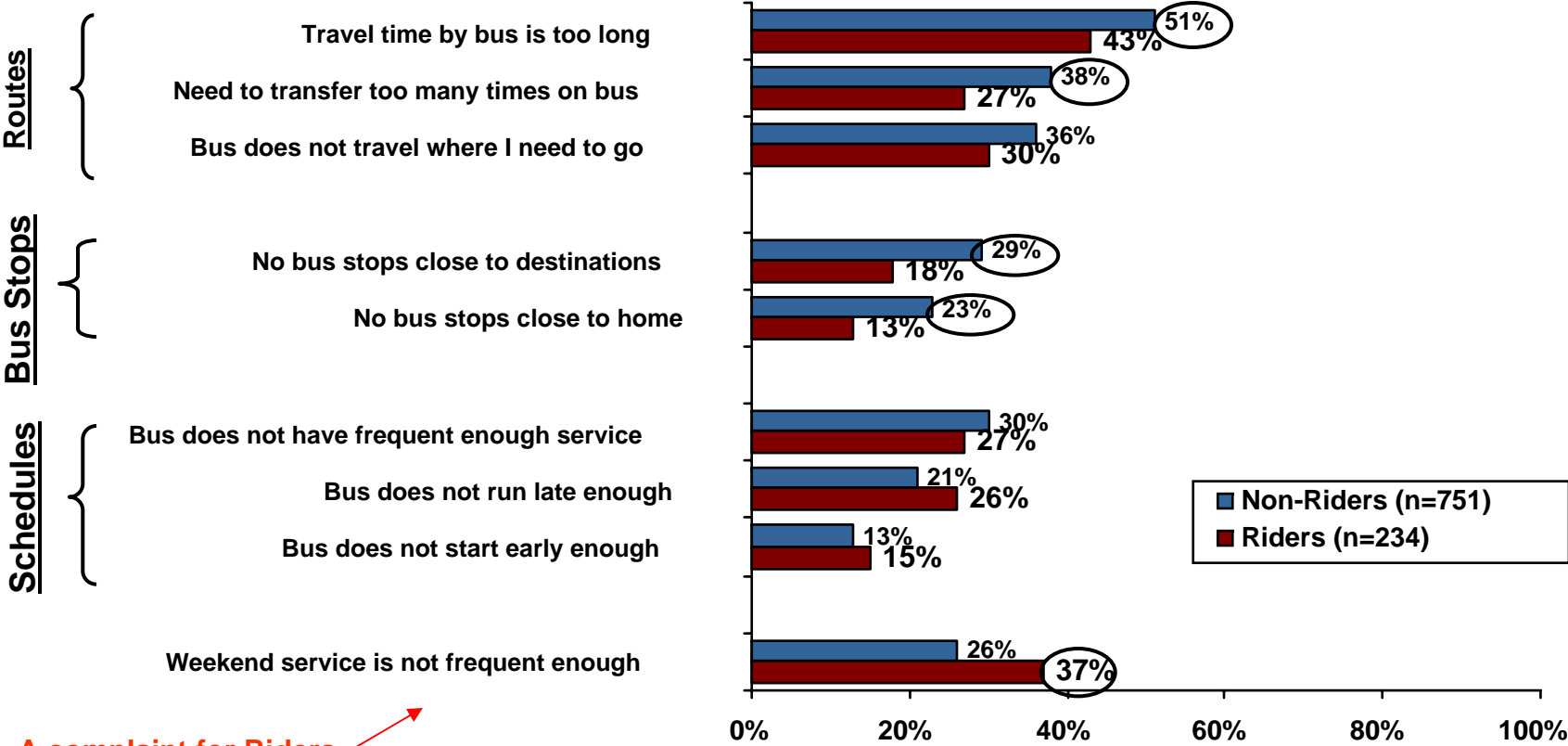
Presentation Organization

- Study Background, Objectives and Methodology
- Functional Barriers
- Structural Barriers - constraints of routes, schedules, unique needs
- Personal Barriers
- Reaction to Service Changes
- Gas Price Analysis

Bus Stops and Routes emerge as barriers for Non-Riders as they have significantly more concerns with these issues. Schedules do not differentiate between rider groups.

Structural Barriers

Strongly/Somewhat Agree with Statements



A complaint for Riders →

○ Indicates significant difference at 95% confidence level above current likelihood of same rider group.

Base: Qualified Respondents (n=985)
 Q775/Q780/Q790 To what degree do you agree or disagree with each of the statements below?

Presentation Organization

- Study Background, Objectives and Methodology
- Functional Barriers
- Structural Barriers
- Personal Barriers - opinion-based obstacles
- Reaction to Service Changes
- Gas Price Analysis

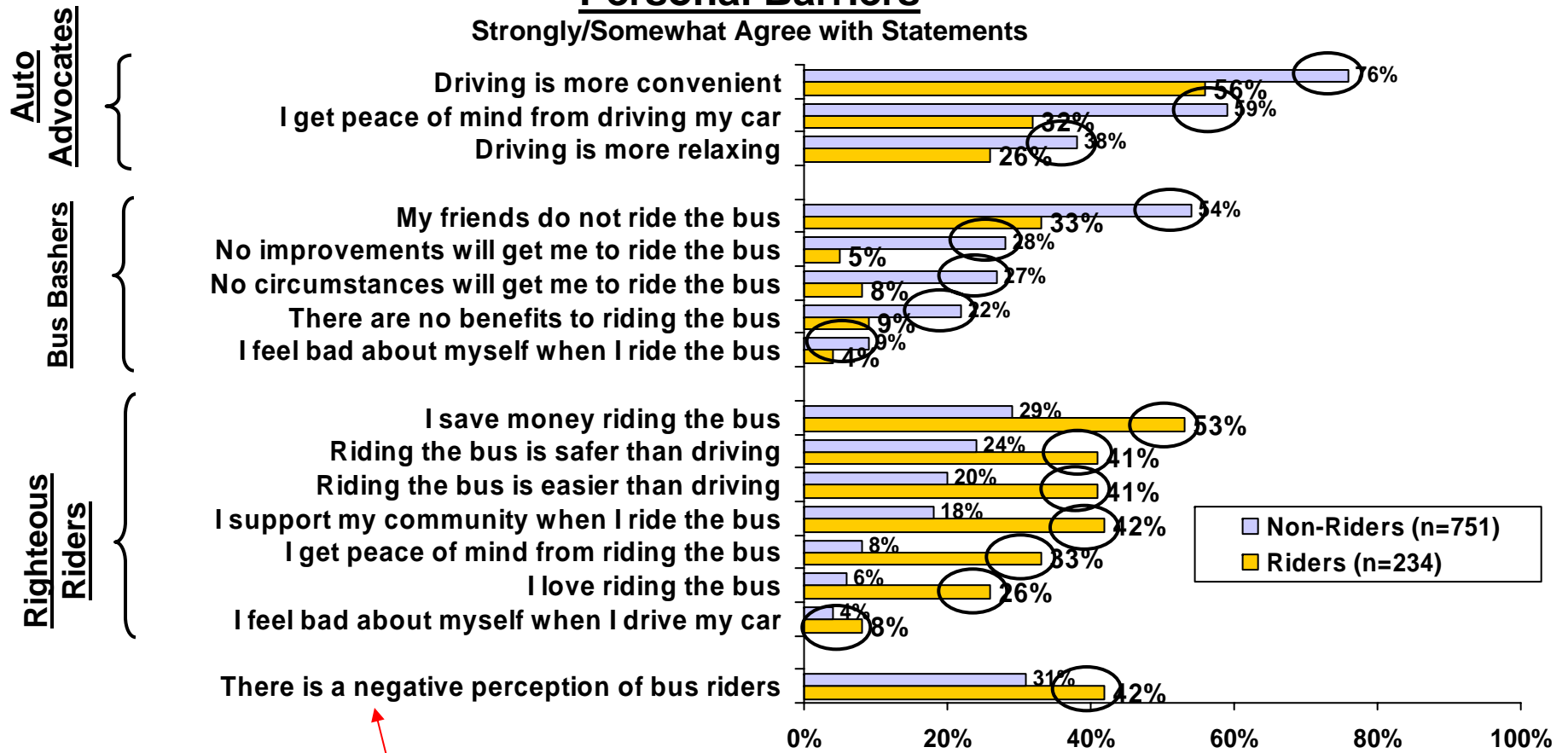
Personal Barrier Groups

- Two Personal Barriers found among Non-Riders
 - “Auto Advocates”
 - Connection to their vehicles affects bus ridership
 - Strongest barrier among Non-Riders.
 - “Bus Bashers”
 - Reflects a high level of cynicism towards the bus.
- One “Anti-Barrier” identified that distinguishes Riders from Non-Riders.
 - “Righteous Riders”
 - Hold a set of emotions or values that support bus ridership
 - Will solidify riding behavior if reinforced among riders.
 - Potential connections to influence ridership among Non-Riders

Two key personal barriers to ridership emerge – strong affinity for the use of cars, and a lack of recognition of bus benefits. One “anti-barrier” was also identified – Riders clearly see benefits to the bus.

Personal Barriers

Strongly/Somewhat Agree with Statements



A challenge to help Riders overcome

○ Indicates significant difference at 95% confidence level above current likelihood of same rider group.

Base: Qualified Respondents (n=985)

Q775/Q780/Q790 To what degree do you agree or disagree with each of the statements below?

Presentation Organization

- Study Background, Objectives and Methodology
- Functional Barriers
- Structural Barriers
- Personal Barriers
- Reaction to Service Changes
- Gas Price Analysis

Every potential service change increases Non-Rider's likelihood to ride the bus. The greatest increase comes from having bus stops within two blocks of home.

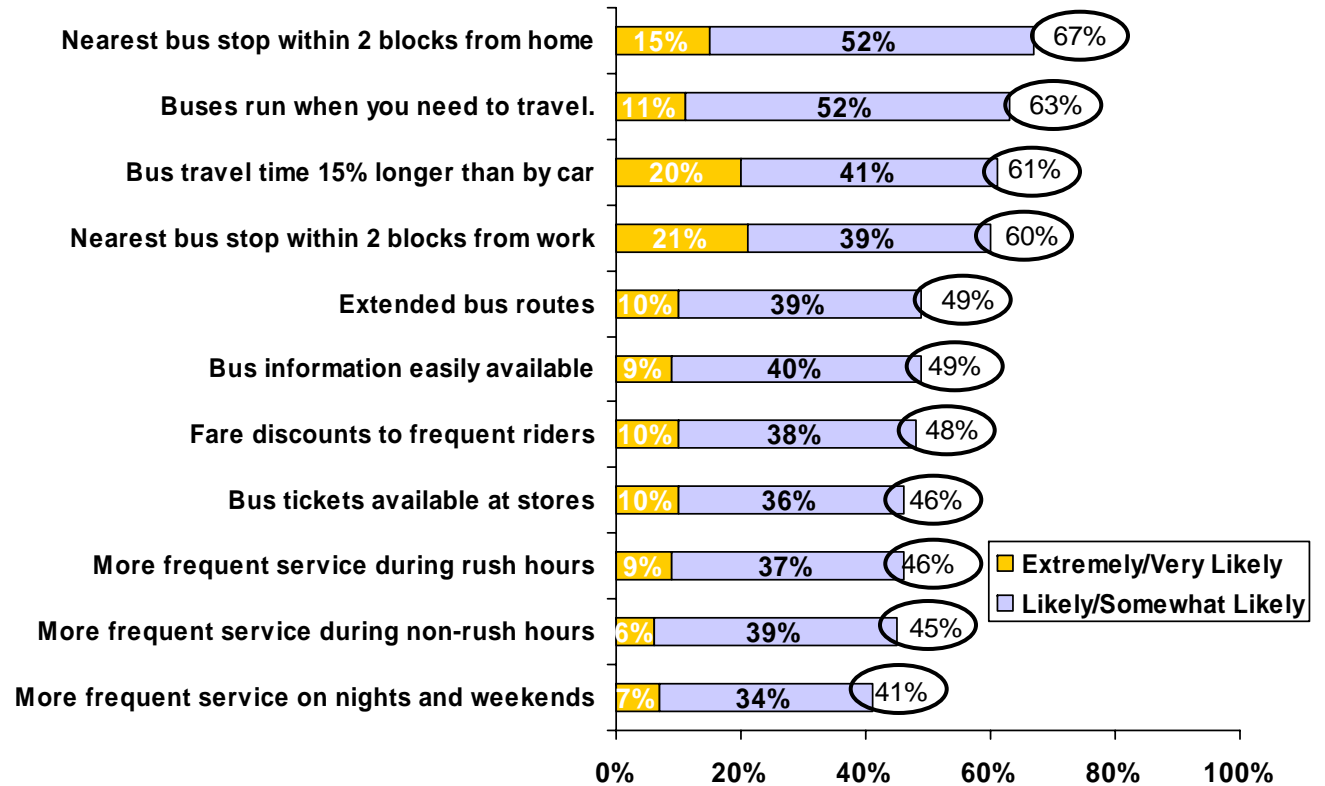
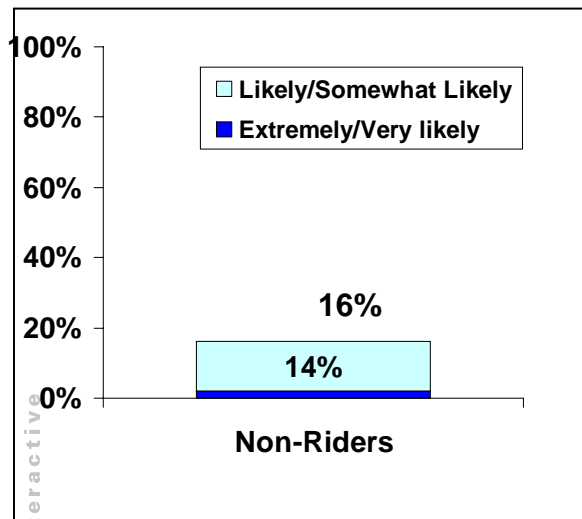
Likelihood of Using Bus After Changes in Service

Non-Riders
(Top 4 Box – Extremely/Very Likely/Likely/Somewhat Likely)



Current Likelihood of Using Bus

(Top 4 Box)



Base: All Qualified Respondents

Q800 Below is a list of possible changes made to the existing local public bus service. For each, please tell us how likely you would be to use the local public bus services in the next twelve months if this change were made.

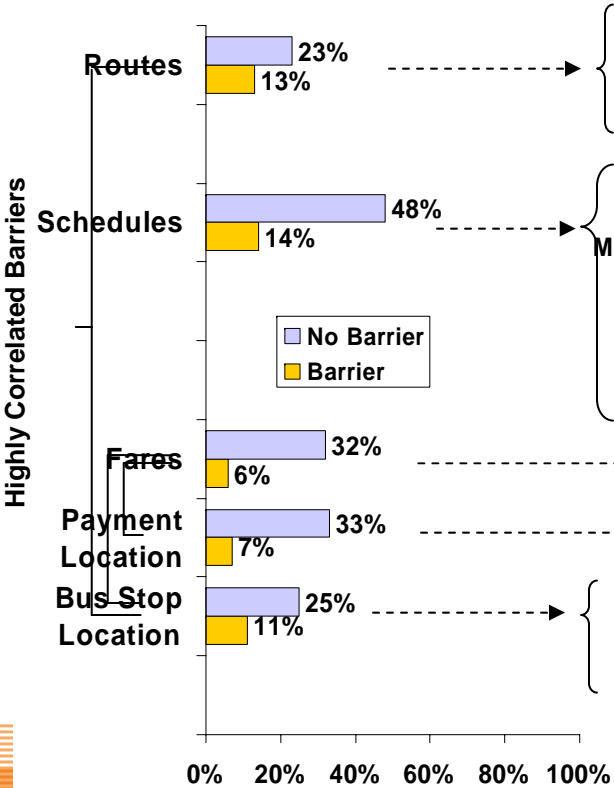
○ Indicates significant difference at 95% confidence level above current likelihood of same rider group.

Non-Riders with functional barriers have the largest increase in bus rider likelihood when changes are made to bus services.

Barrier Reduction Non-Riders

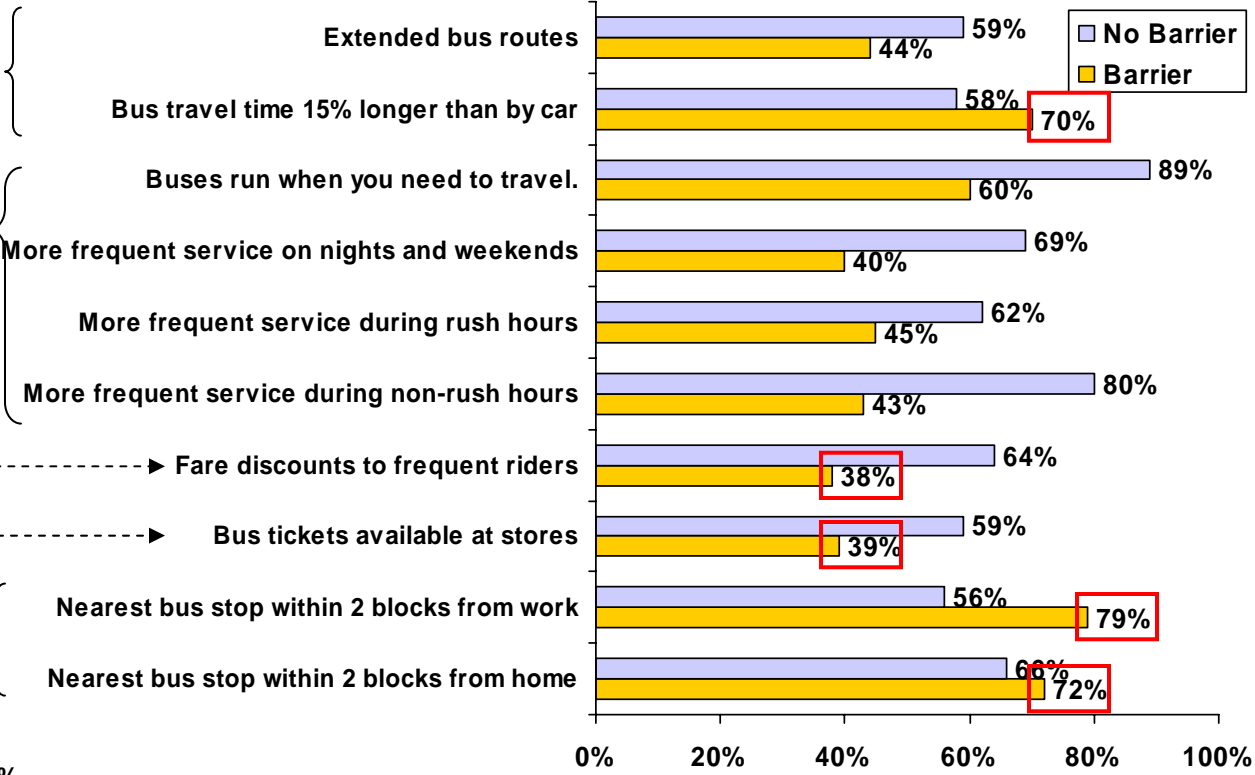
Current Likelihood of Using Bus

(Top 4 Box – Extremely/Very Likely/Likely/Somewhat Likely)



Likelihood of Using Bus After Changes in Service

(Top 4 Box – Extremely/Very Likely/Likely/Somewhat Likely)



 New Likelihood more than five times higher than Current Likelihood

Base: All Qualified Respondents

Q800 Below is a list of possible changes made to the existing local public bus service. For each, please tell us how likely you would be to use the local public bus services in the next twelve months if this change were made.

Barrier Analysis Summary

- Knowledge gaps in bus services among Non-Riders affect the likelihood to ride the bus in the next year.
 - At least 1 in 3 Non-Riders are not familiar with any bus service
 - Largest knowledge gap is with bus schedules, where 3 out of 4 Non-Riders are not familiar
 - For each bus service, those who have some familiarity are more likely to ride the bus in the next year.
- Structural barriers exist that prevent Non-Riders from transit use
 - Half of Non-Riders report bus travel times takes too long
 - At least a third agree they have to transfer too many times and the bus can not take them where they need to go
 - Largest differences between ridership groups are for barriers with routes and bus stop location
- Non-Riders have strong opinions in favor of cars and against the bus
 - However, Riders find many benefits to riding the bus that Non-Riders don't see
- While we cannot assert a causal link between knowledge of services and ridership, the two are related.
 - Increasing knowledge of bus services can mitigate functional barriers
 - High correlation between barrier groups indicates addressing one group will affect others

Barrier Analysis Summary

- Possible actions to reduce barriers and increase ridership:

Functional/Structural Barriers	Possible Actions
Schedules	- Create awareness of start/stop times and frequency
Payment Locations	- Increase convenience by expanding availability/locations
	- Create/update point-of-purchase materials for current locations
Fares	- Create awareness of economical cost of fares
	- Discounts for frequent riders popular, but risk negative revenue impact
Routes	- Limiting trip duration to no more than 15% longer than by car very popular
	- Emphasize express routes as Non-Rider awareness is low
Bus Stop Location	- Increase presence of stops in commercial areas
	- Emphasize presence of current stops near work

Personal Barriers	Possible Actions
Auto Advocates	- continue focus on connecting with emotional and value components in advertising campaigns over time to emphasize positives of ridership and refute negative perceptions ... no "quick wins"
Bus Bashers	
Righteous Riders – the “anti-barrier”	

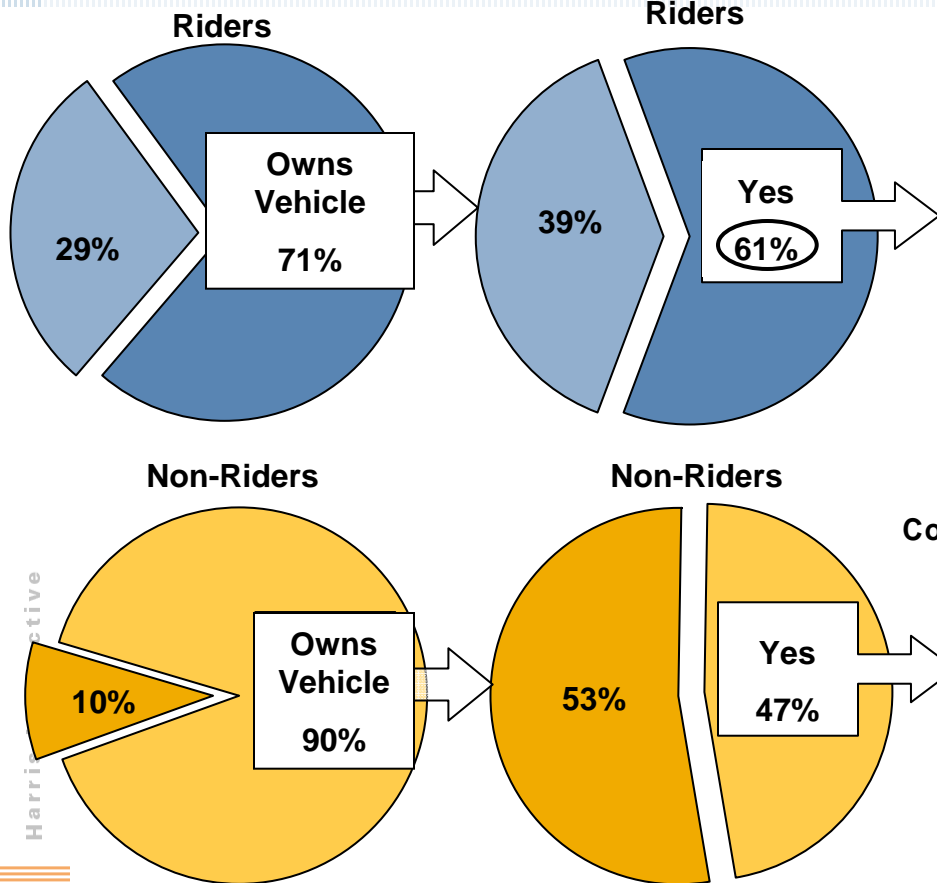
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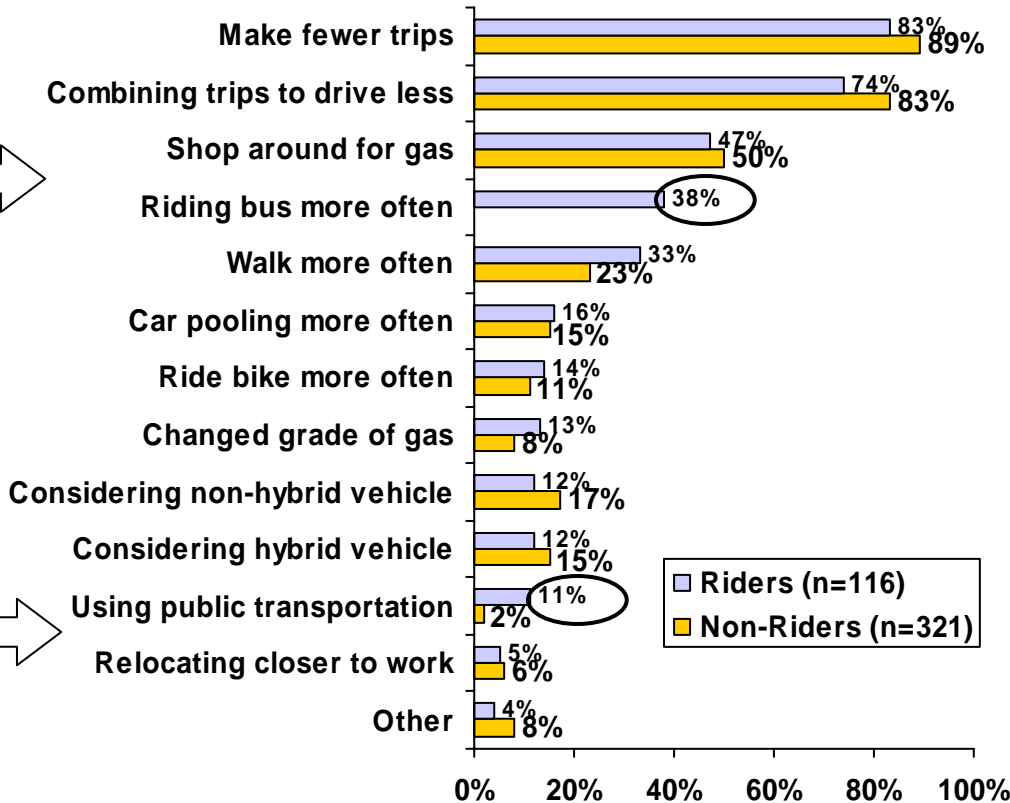
Almost half of Non-Riders and two-thirds of Riders with vehicles report changing their driving habits due to gas price increases.

Have You Changed Driving Habits Due to Gas Price?

Vehicle Ownership



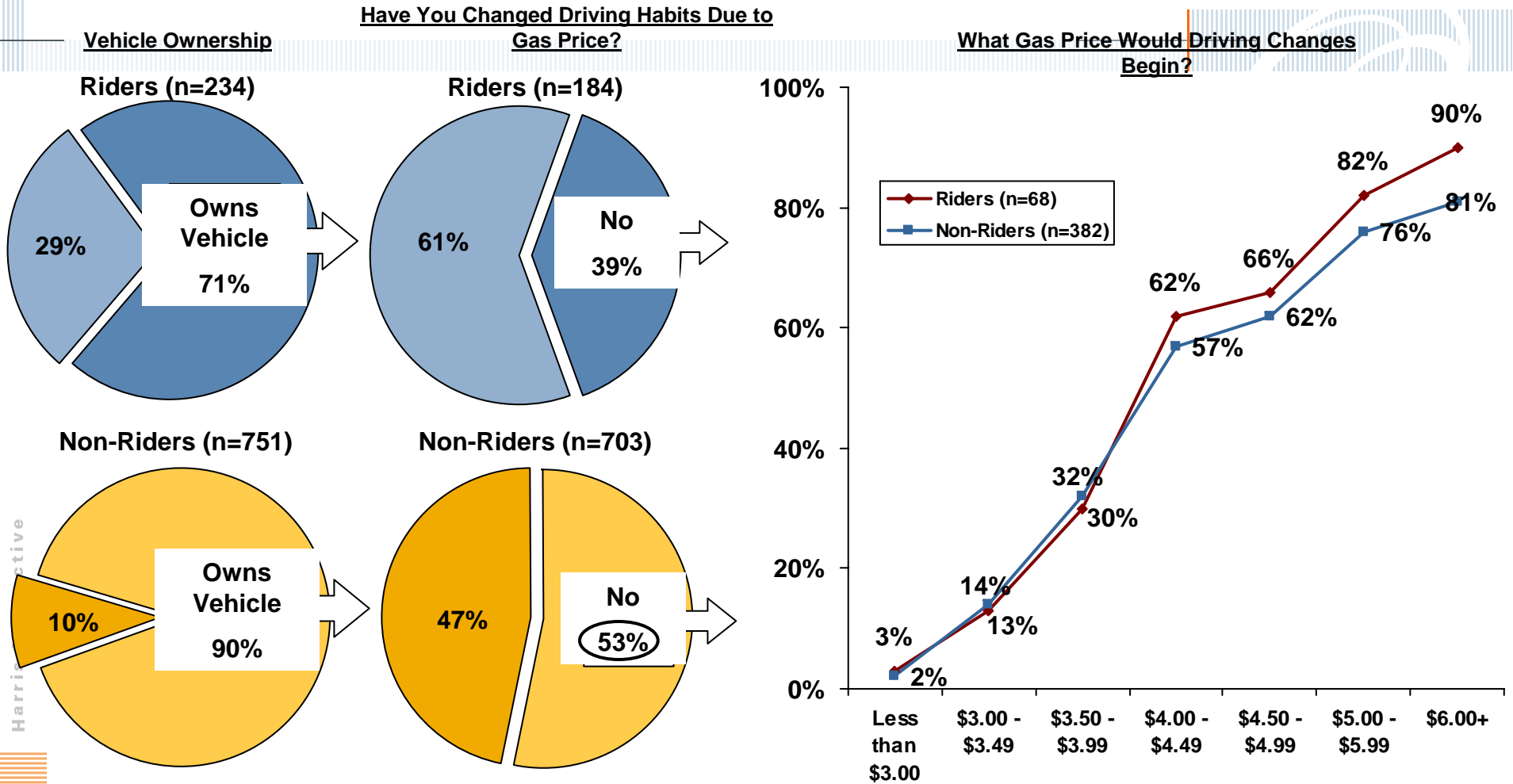
Driving Habit Changes



○ Indicates significant difference at 95% confidence level above uncircled rider group.

Q439 Do you have one or more vehicles in your household?
 Q810 During the past year, have you changed your driving habits due to rising gas prices?
 Q820 What change(s) have you made in your driving habits due to gas prices in the past year?
 Please select all that apply.

Most Riders and Non-Riders who have not changed their driving habits indicate they will change before gas prices reach \$4.50 per gallon. Almost one-fifth of Non-Riders will not change driving habits at any price.



Q439 Do you have one or more vehicles in your household?

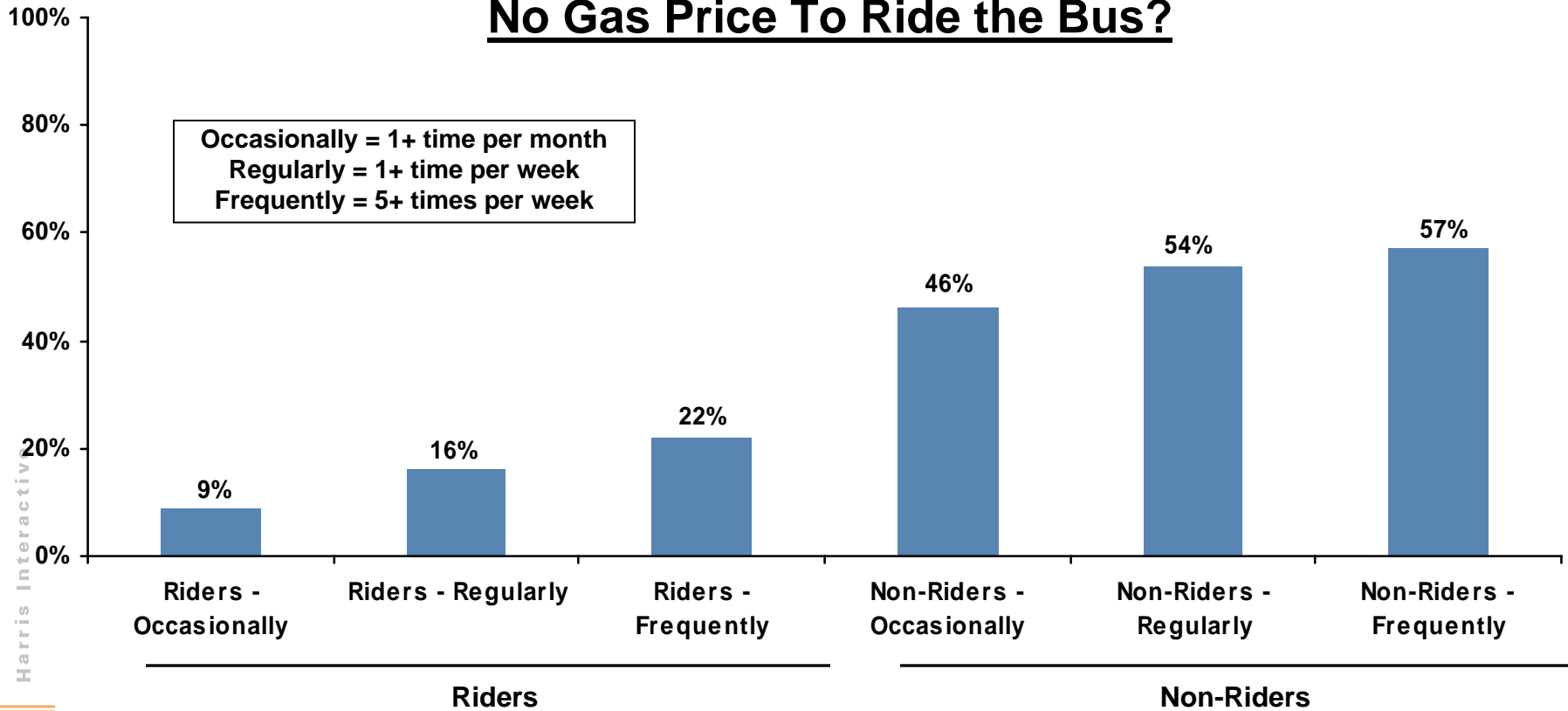
Q810 During the past year, have you changed your driving habits due to rising gas prices?

Q840 What is the minimum gasoline price, if any, at which you would begin to change your driving habits?

Almost half of Non-Riders indicate there is no gas price at which they would ride the bus at least one time per month.



No Gas Price To Ride the Bus?



Base: Qualified Respondents (Riders n=184, Non-Riders n=703)

Q860 What is the minimum gasoline price, if any, at which you would ride the bus occasionally in the next year? By occasionally, we mean at least once per month.

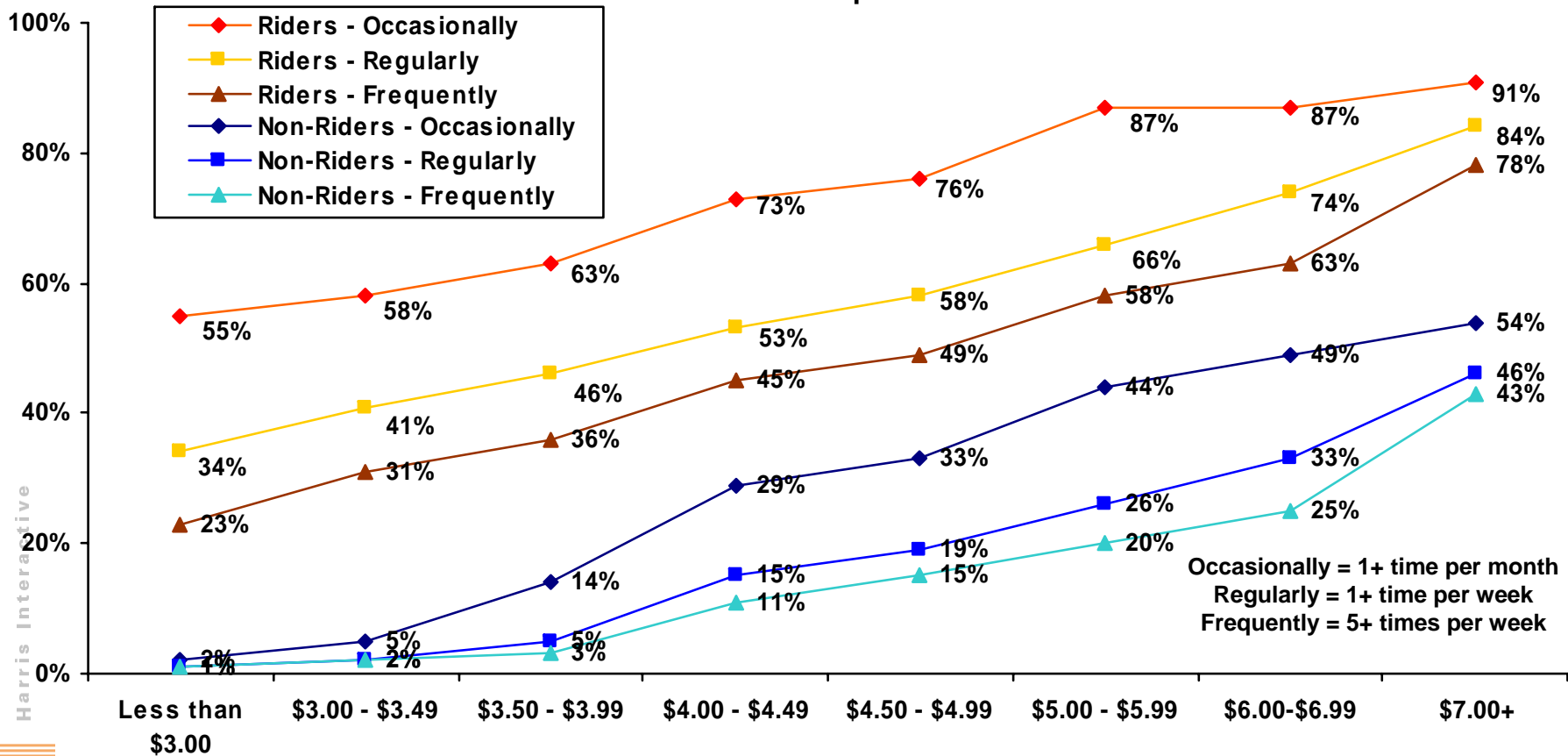
Q870 What is the minimum gasoline price, if any, at which you would ride the bus regularly in the next year? By regularly, we mean at least once per week.

Q880 What is the minimum gasoline price, if any, at which you would ride the bus frequently in the next year? By frequently, we mean five or more times per week.

Non-Riders anticipate prices need to hit at least \$4 per gallon before there is a noticeable increase in a willingness to use transit.

What Gas Price Would You Ride the Bus?

All Respondents



Base: Qualified Respondents (Riders n=184, Non-Riders n=703)

Q860 What is the minimum gasoline price, if any, at which you would ride the bus occasionally in the next year? By occasionally, we mean at least once per month.

Q870 What is the minimum gasoline price, if any, at which you would ride the bus regularly in the next year? By regularly, we mean at least once per week.

Q880 What is the minimum gasoline price, if any, at which you would ride the bus frequently in the next year? By frequently, we mean five or more times per week.

Impact of Gas Prices

- Almost half of Non-Riders (47%) and two-thirds of Riders (61%) with vehicles report changing their driving habits due to gas price increases.
 - This may be leading Riders to use the bus more frequently in the coming year.
- There is a large core of Non-Riders resistant to using transit to alleviate the impact of high gas prices.
 - Almost half (46%) report there is no price that would drive them to use transit occasionally (at least once per month).
 - Non-Riders anticipate prices need to hit at least \$4 per gallon before there is a noticeable increase in a willingness to use transit.