



# Southeast Wisconsin Transit Marketing Research and Evaluation Initiative

## Synopsis of Wave VII Profile

*Wisconsin Department of Transportation (WisDOT) Wave 7 Report*

**Rani Shah**  
Harris Interactive  
2805 Butterfield Road  
Suite 330  
Oak Brook  
Illinois 60523  
Tel (630) 472 9500  
Fax (630) 472 9534  
rshah@harrisinteractive.com

[www.harrisinteractive.com](http://www.harrisinteractive.com)

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# Background and Methodology

## Background

- Harris Interactive's charge for this wave included:
  - Profiling riders and non-riders:
    - Awareness, familiarity, and comfort levels with the bus system.
    - Assessing riding patterns and reasons for riding the bus.
    - Evaluating fall ad campaign awareness and recall.
    - Evaluating whether rising gas prices have affected driving habits in the 6 county area.

## Methodology

- Surveyed 316 residents in S.E. Wisconsin in November 2005.
- Respondents were contacted either through client supplied lists or through random digit dialing in the six county metro area.
- Conducted 10-12 minute telephone interviews with regular and occasional bus riders and non-riders.

# Key Learnings

- High levels of satisfaction among riders.
- Comfort level with the bus continues to remain high. However, familiarity and knowledge of bus systems and bus routes can be increased among occasional and non-riders.
- We also know that regular and occasional riders exhibit “differential” loyalty toward bus riding; implying that the Partnership needs to maintain loyalty among regular riders and to increase “loyalty” among occasional riders.
- Advertising messages have different levels of saliency to regular and occasional riders. These messages also have low levels of saliency among non-riders.
- Among those with car access, rising gas prices have affected the driving habits or car use of over half the respondents we surveyed.



# Executive Summary

## Attitudes Toward Riding the bus

- Most riders are satisfied with the bus as it relates to their transportation needs (46% extremely satisfied, 78% Top 2 Box). This implies that satisfaction is not that big of an issue in converting occasional riders to regular riders.

## Reasons for Riding

- Most ride to commute to / from work or school (55%).
- About two-thirds of occasional riders primarily ride the bus for other reasons and not for commuting.
- Leveraging employers' role and responsibility emerges as a potential way of increasing commuting ridership among occasional riders and possibly among non-riders as well.

## Ad Recall

- Messages are clear, however, message saliency can be enhanced among occasional riders in an effort to make the advertising more impactful.
- As expected, ad messages are least salient among non-riders.

# Executive Summary (continued)

## Ad Recall (continued)

- Again, over half of those who recalled seeing the ads, say that they saw these ads on TV (52%)
- Overall, a greater percentage of respondents recalled seeing the ads this year versus last year (65% vs. 54%). Ad recall might be higher this year because we conducted the survey relatively close to the end of the fall campaign.

## Gas Prices and Car Access

- Over half (57%) of those with car access said that rising gas prices had impacted their driving habits or car use.
- Tipping point for riders with car access: Gas Prices between \$3:00 and \$3.99 or \$5 or more dollars per gallon.
- Tipping pt for non-riders with car access over \$5 a gallon.
- Additionally,
  - A fifth of bus riders said that gas prices would not affect their driving habits (versus 16% of non-riders).
  - A third of non-riders could not tell us how high gas prices would have to go before it affected their driving habits (versus 18% of riders).



# Detailed Findings

# They know what to call you! County residents linked/placed name of county in title as they identified their bus system. Non-riders were less likely to know the name of their bus system.

## COMFORT/FAMILIARITY

Familiarity with transit system moniker differs across counties.

In many of the counties, non-riders had a higher proportion of “don’t know” responses.

	Don't Know responses by county*	
	Riders %	Non-riders %
Milwaukee	1	12
Kenosha	9	21
Waukesha	--	27
Ozaukee	--	31
Washington	9	29
Racine	7	47

\* Small base sizes outside of Milwaukee county

Names Mentioned	%
<b>Milwaukee</b> (Base: Milwaukee Residents n=152)	
Milwaukee County Transit system	41
Milwaukee County Transit/Transportation	24
Milwaukee Transit	17
Milwaukee County	9
<b>Kenosha</b> (Base: Kenosha residents n=25)	
Kenosha Transit	72
Don't Know	16
<b>Waukesha</b> (Base: Waukesha residents n=32)	
Metro	34
Waukesha Metro	31
Waukesha Transit	9
Waukesha Metro Transit System	9
Don't Know	13
<b>Ozaukee</b> (Base: Ozaukee residents n=23)	
Ozaukee County Express	30
Don't Know	22
<b>Washington</b> (Base: Washington residents n=40)	
Washington County Commuter Express	63
Don't Know	18
<b>Racine</b> (Base: Racine residents (44)	
Belle Urban System	52
The Bus	14
Don't Know	20

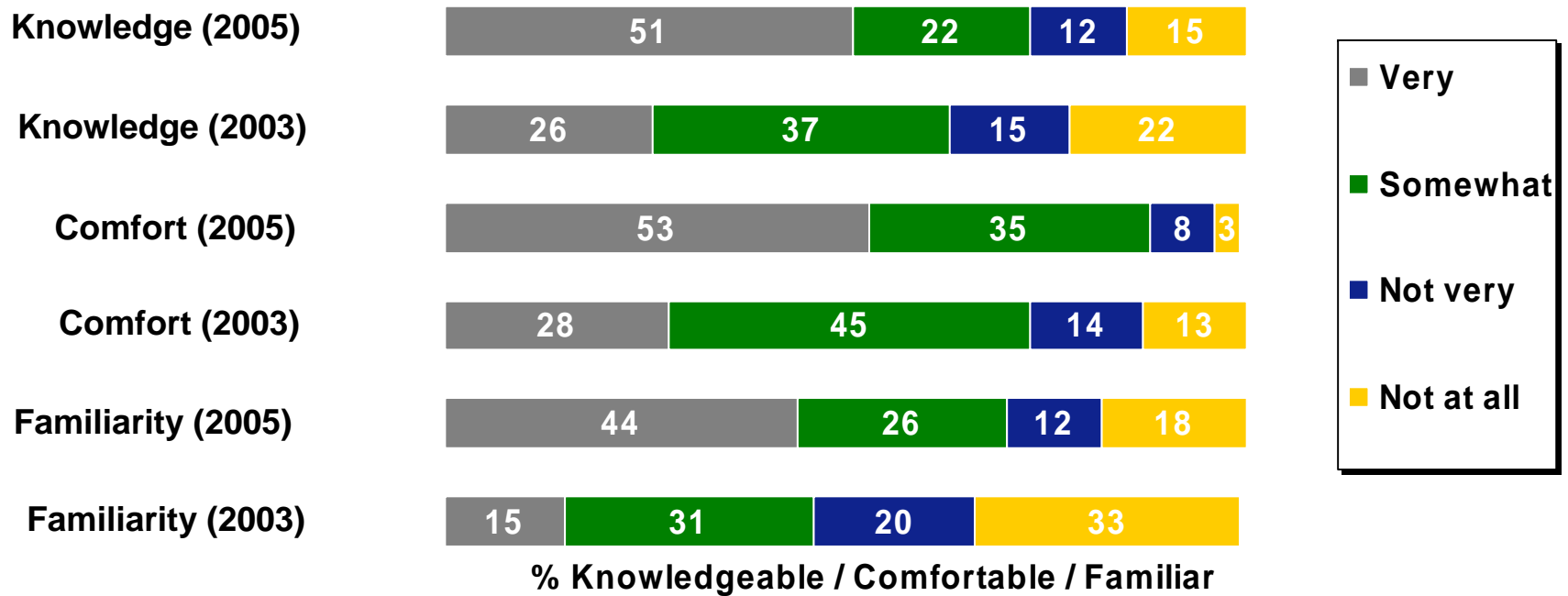
Q.5a What is the name of the bus system that provides public transportation services in your area?



# Respondents much more familiar, knowledgeable and comfortable riding the bus in 2005 than in 2003; however, this may be due to the larger and redefined ridership base in the current study.

## COMFORT/FAMILIARITY

Familiarity with bus routes continues to remain low, especially among non-riders.



Base: Total respondents (June 2003: n=900; Dec 2005: n = 316)

Q. 9/34 Overall, how familiar are you with the routes served by the bus system in your county?

Q. 10/35 How knowledgeable are you about how to use the bus system in your county?

Q. 11/36 Given what you know about public transportation services in your area, how comfortable would you say you would be riding the bus?

No stat testing done on the numbers across years because regular riders and occasional riders were redefined in 2004.



# As expected, riders (regular and occasional) are more comfortable/familiar with service than non-riders.

## COMFORT/FAMILIARITY

### How Comfort/Familiar by Ridership

- Overall, comfort and familiarity with the bus system is substantially higher in 2005 than in 2003.
- Among non-riders, familiarity and knowledge is slightly lower compared to 2003; however, comfort level is higher.\*

	<i>TOTAL 2005 Top 2 Box %</i>	<i>TOTAL 2003 Top 2 Box %</i>	<i>RIDERS 2005 Top 2 Box %</i>	<i>RIDERS 2003 Top 2 Box %</i>	<i>NON RIDERS 2005 Top 2 Box %</i>	<i>NON RIDERS 2003 Top 2 Box %</i>
<b>Comfortable</b>	89	73	96	88	74	62
<b>Knowledge</b>	73	63	94	75	29	35
<b>Familiar</b>	69	46	95	62	16	21
<b>Base</b>	(316)	(900)	(213)	(265)	(103)	(635)

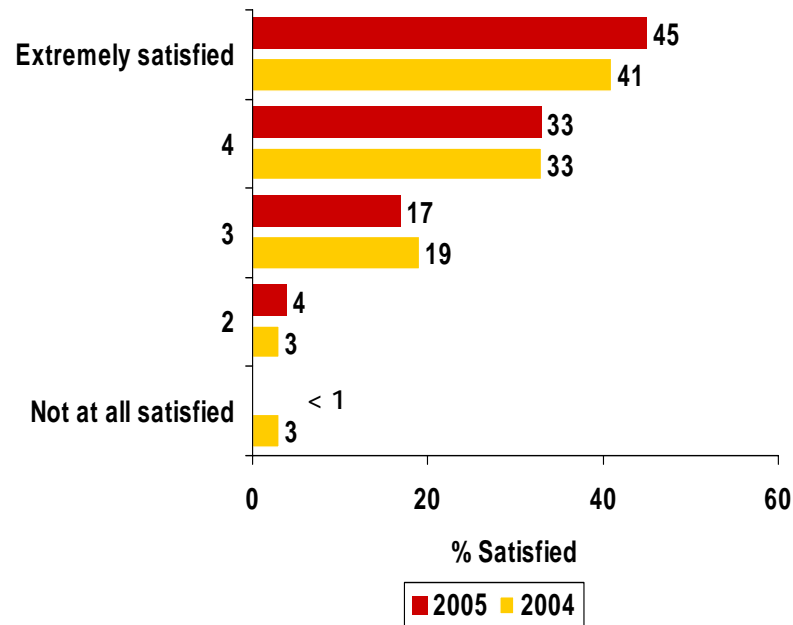
Note: 2005 - Riders include Regular and Occasional Riders.

\* This may be due to the 16 non-riders who had ridden at least once in the past 12 months. We are in the process of investigating this.



# Most riders are satisfied with the bus as it relates to their transportation needs (78%). Regular riders are slightly more satisfied than occasional riders.

ALL RIDERS



	Reg. Riders	Occasional Riders	Non – Riders (who rode 2 or less times in the past 12 months)
Extremely/ Very Satisfied (5 or 4)	80%	75%	81%
3	17%	20%	6%
Less than Satisfied (2 or 1)	3%	5%	13%
Mean	4.3	4.1	4.0
Base	(n=116)	(n=97)	(n=16)

Base: All who had ridden bus in past 12 months (n=229)

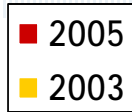
Q.14 Overall, how satisfied are you with the bus as it relates to the transportation needs you just mentioned. Please rate your satisfaction on a 5-point scale, on which "5" is extremely satisfied and "1" is not at all satisfied.

Bolded numbers are significantly different from each other within pairs ( $p \leq .05$ ).



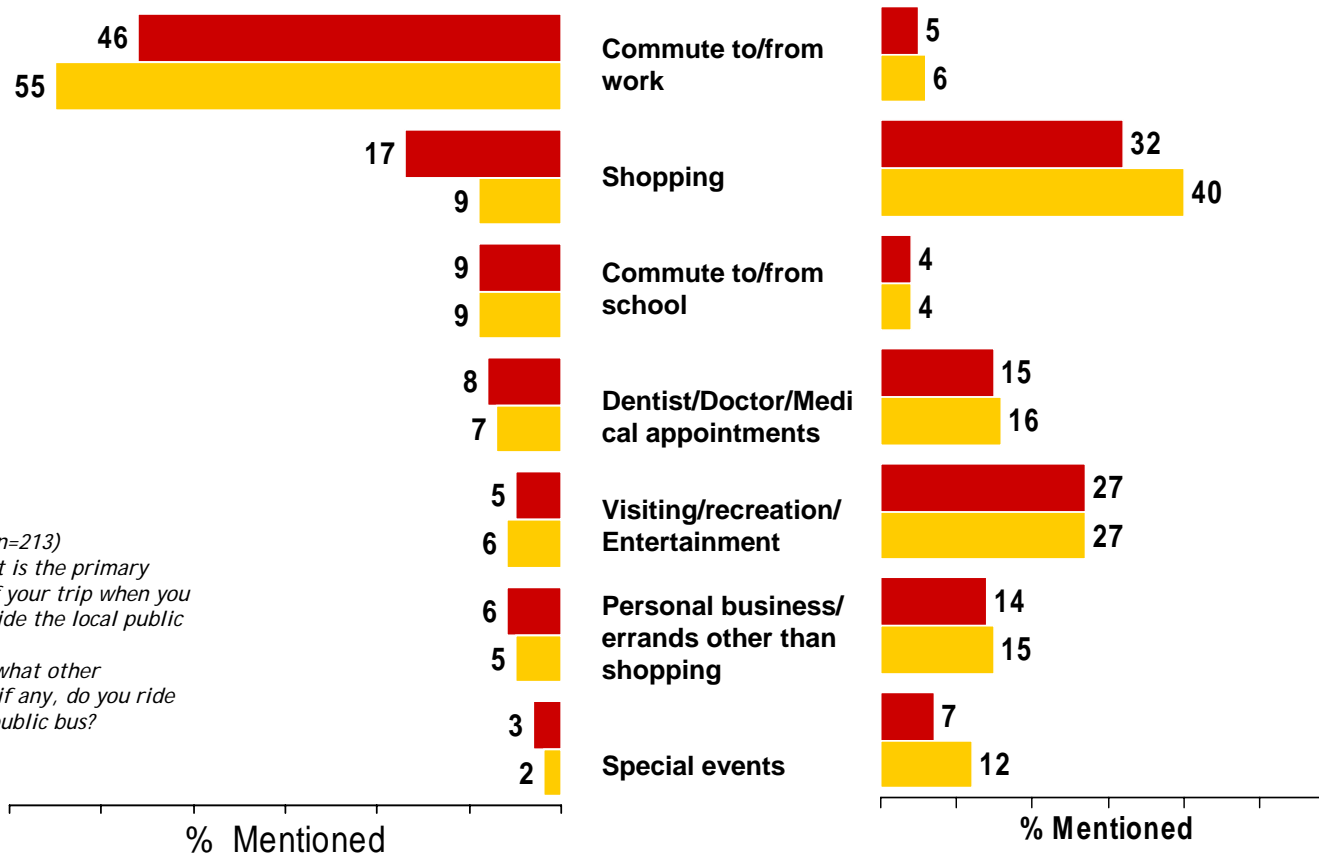
# Primary purpose of bus trip is to commute to work/school. Key secondary purposes are shopping and visiting/recreation/ entertainment.

ALL REG/OCC. RIDERS



## Primary (Q.12)

## Secondary (Q.13)

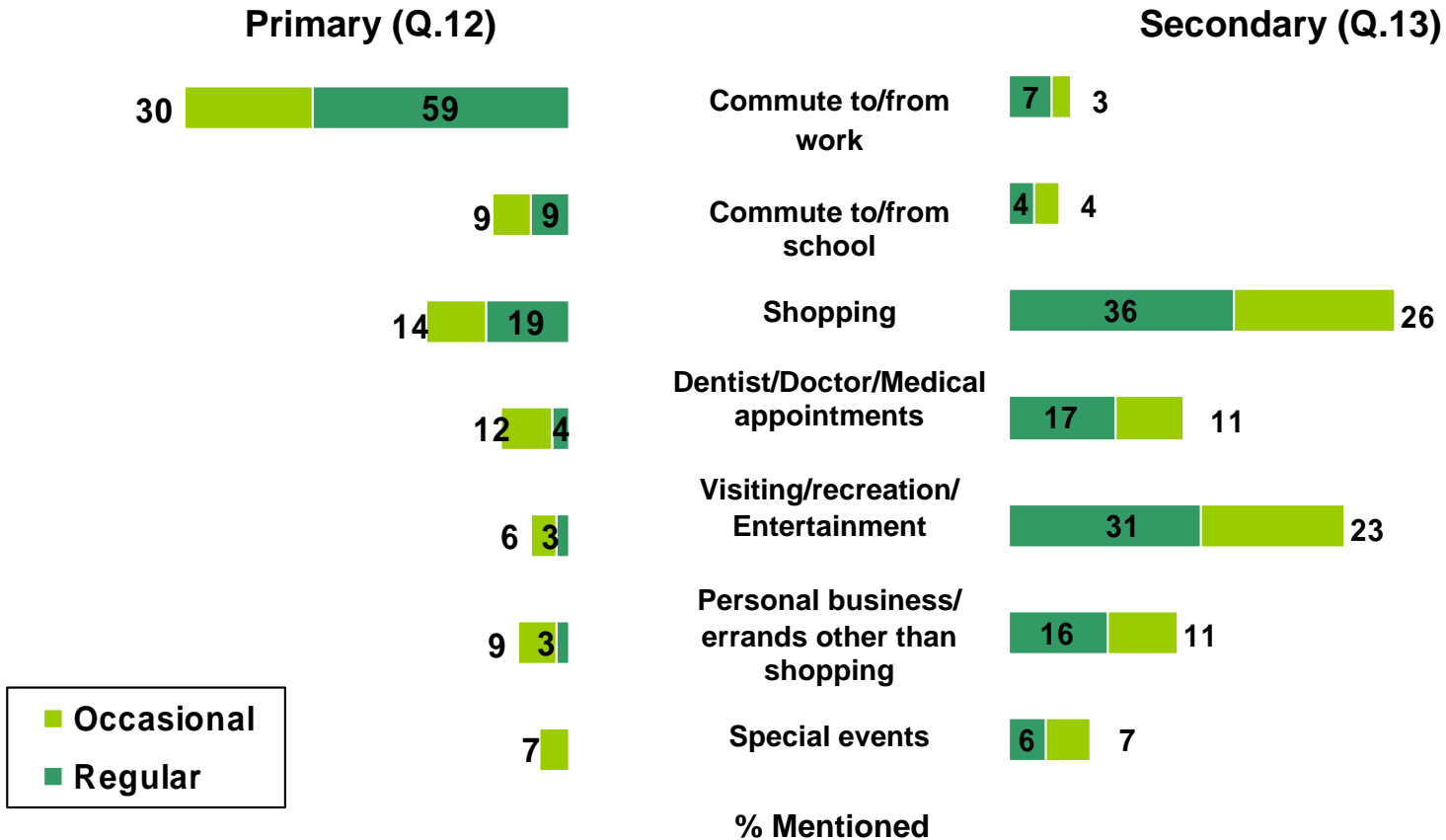


Base: All (n=213)  
 Q.12 What is the primary purpose of your trip when you typically ride the local public bus?  
 Q.13 For what other purposes, if any, do you ride the local public bus?



Among regulars, the key purpose of their trip is to commute. About two-thirds of the occasionals primarily ride the bus for purposes other than commuting.

RIDERSHIP STATUS

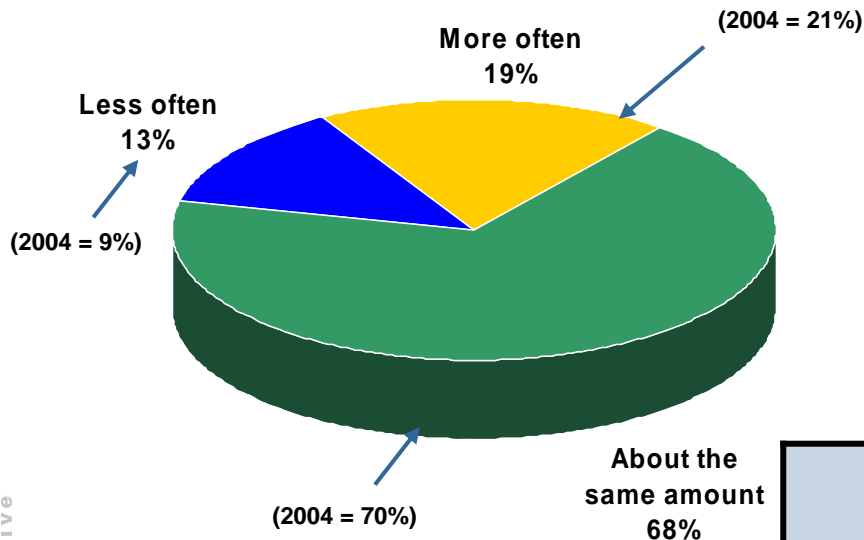


Base: All (n=213) Q.12 What is the primary purpose of your trip when you typically ride the local public bus? Q.13 For what other purposes, if any, do you ride the local public bus?



# A majority plan to ride the same amount in the next year.

ALL REG/OCC. RIDERS



- Occasional riders less likely to ride in future than regular riders.
- Slight differences emerge in 2005 data in comparison to 2004 findings. In 2005, a slightly higher percentage of respondents say that they will ride less often in the next 12 months than in 2004.

	<i>Regular Riders</i>		<i>Occasional Riders</i>	
	<b>2005</b>	<b>2004</b>	<b>2005</b>	<b>2004</b>
More often	17	20	22	22
Same amount	<b>76</b>	73	<b>58</b>	65
Less often	<b>7</b>	8	<b>20</b>	12

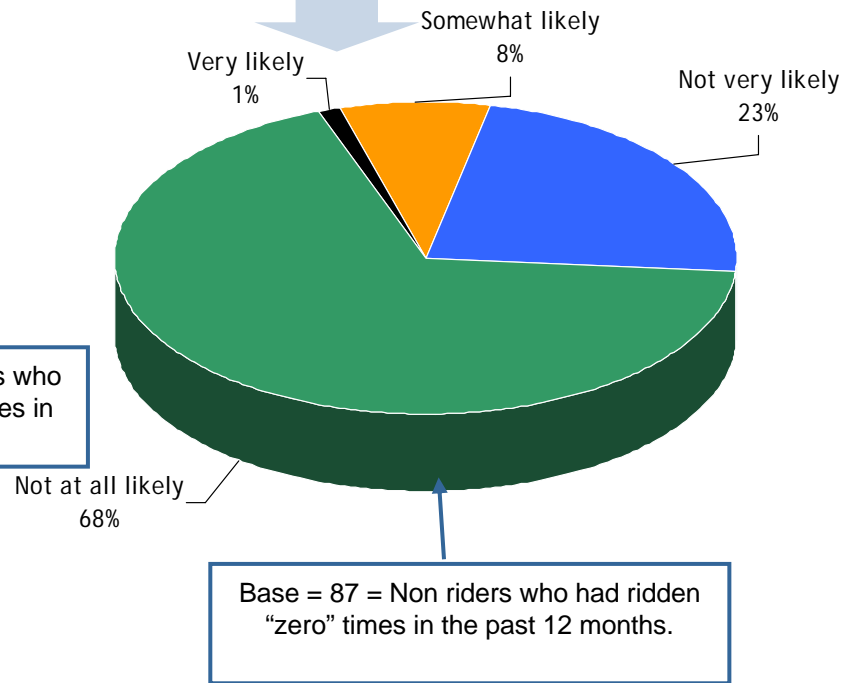
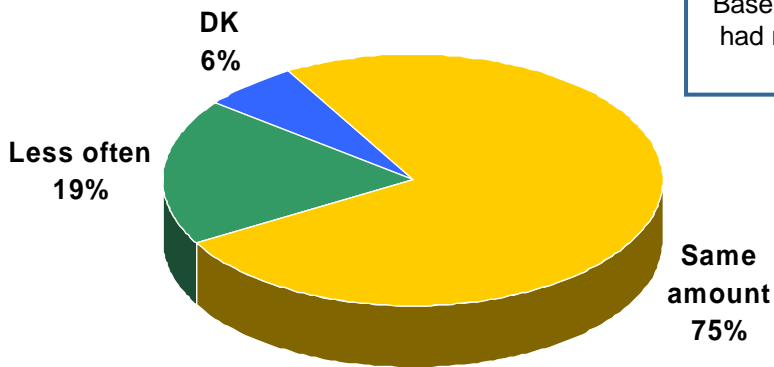
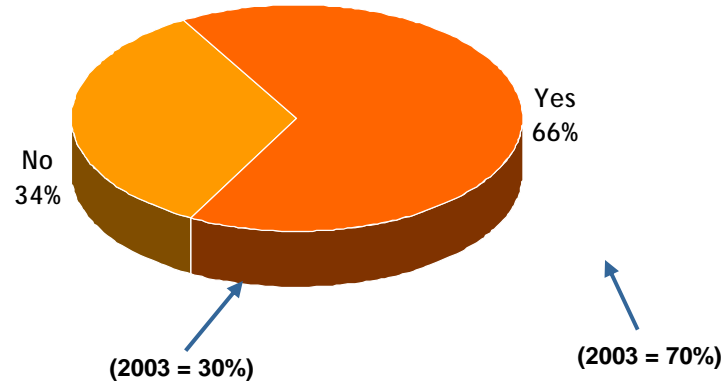
Base: Total Respondents (2005: n=213; 2004: n=341).  
 Q.16 In the coming 12 months, do you expect to ride the local public bus (READ LIST)?  
 Bolded numbers are significantly different from each other within pairs ( $p \leq .05$ ).



# Two-thirds of non-riders have ridden the local public bus at some point.

## NON-RIDERS

Only 8% of non-riders ("0" rides in the past 12 months) are probable riders in the next year (similar to 2003). This is not a very large pool from which the Partnership seeks to increase its market share overall.



Base: Among those who did not ride the bus within past 12 months (2005: n=87; 2003: 561). Q.20/37 Have you ever ridden the bus?  
 Q.21/38 All things considered, how likely are you to ride the local public bus within the next 12 months? Would you say you are (READ LIST)?  
 Q37: Note: If we include the 16 non-riders who did ride the bus at least 1 or 2 times in the past 12 months, total who have taken the bus at some pt = 71%.



# Most likely to try the bus because it is cost effective.

## NON-RIDERS

<i>Reasons For Riding</i>	<b>2005</b> %
Price of gas is expensive/saves me money	38
It's cheaper to ride the bus than to drive a car	13
Because of its accessibility	13
Riding the bus is a social experience	13
It's safer than driving	13
Concerned about the environment	13
My friends or colleagues ride the bus	13
Base: Among those who did not ride bus within past 12 months and are <b>LIKELY</b> to ride local public bus within next 12 months	(8)

Q.22/38: Why are you (very likely/somewhat likely/not very likely/not at all likely) to ride the local public bus within the next 12 months?



# Having alternate means of transportation available and a stated preference for driving.

NON-RIDERS

Key reason for not riding the bus: Having a car and “I prefer to drive.”

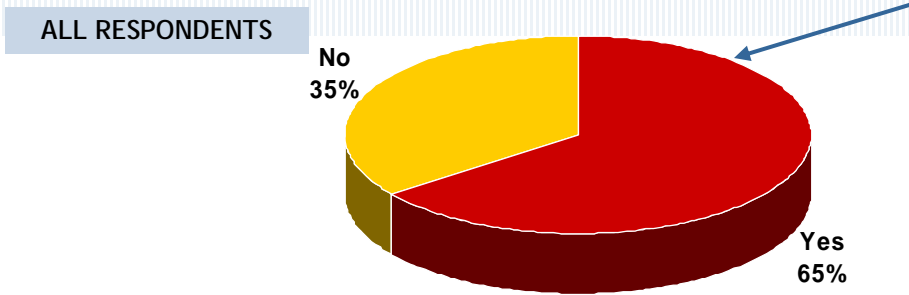
<i>Reasons For Not Riding*</i>	<b>2005</b> %
Have a car	38
I prefer to drive	22
No bus service available/doesn't go to places I need	10
Because of its accessibility	5
Bus station locations are not convenient	5
Health/physical problems	5
No change/same usage	5
<b>Base: Among those who did not ride bus within past 12 months and NOT likely to ride local public bus within next 12 months</b>	<b>(79)</b>

*Q.22/38: Why are you (very likely/somewhat likely/not very likely/not at all likely) to ride the local public bus within the next 12 months?*

*\*Responses 5% and over are displayed*

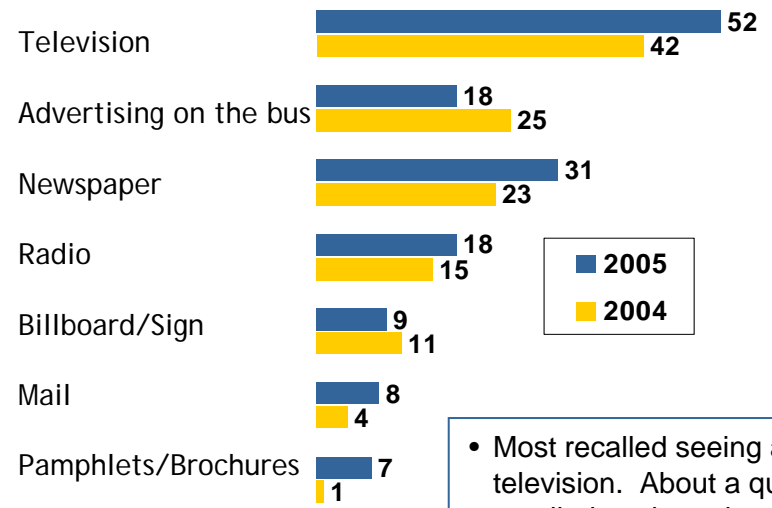


# About two-thirds recalled seeing, reading, or hearing ads for the bus system. TV and newspaper are primary sources. Key secondary sources are ads on the bus and radio.



- Percentage recalling ads is higher than in either 2003 or 2004:
  - Spring '03 study, wherein, 58% recalled seeing ads and 42% did not.
  - Spring '04 study, wherein, 54% recalled seeing ads and 46% did not.
- Regular and occasional riders displayed similar levels of ad recall (64% vs. 69%). Non-riders were only slightly less likely to recall ads (60%).

Regular Riders %		Occasional Riders %		Non Riders
2005	2004	2005	2004	2005
54	38	57	47	45
18	25	22	25	13
28	28	27	17	37
14	13	10	18	32
<b>16</b>	17	9	4	<b>2</b>
8	5	<b>13</b>	3	<b>3</b>
7	2	7	1	6
(n = 74)	(n = 108)	(n = 67)	(n = 76)	(n = 62)



Most recalled seeing ads on television. About a quarter recalled seeing ads on the bus and in newspapers.

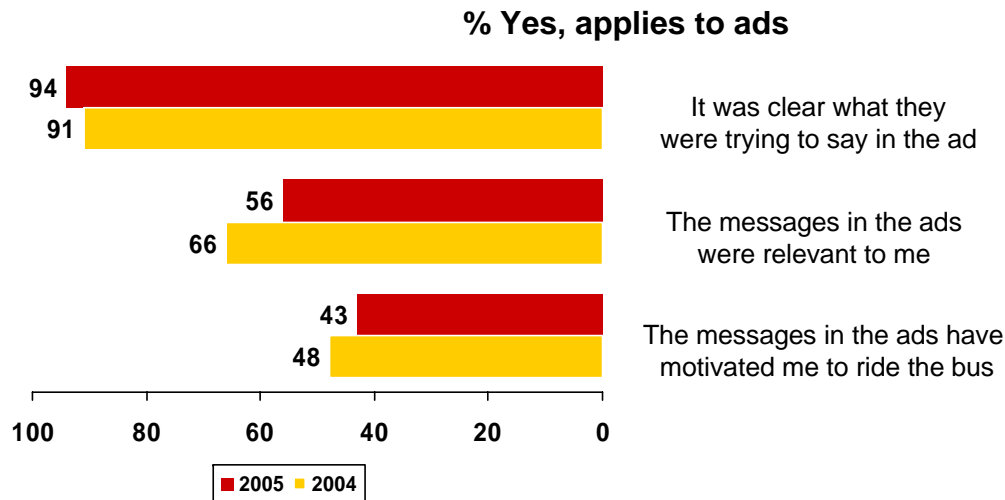
Q.20 Do you recall seeing, reading, or hearing any advertising about the public bus system in the past few months?  
 Base: Total Respondents (2004: n=341; 2005: 316)

Q.21 Where did you see, read, or hear any advertising about the public bus system?  
 Base: Recalled advertising (2004: n=184; 2005: 203)



Ad messages are clear. They are also relevant to a little over half of the respondents. However, less than half the respondents say that ad messages motivate them to ride the bus.

ALL RESPONDENTS



Regular Riders %		Occasional Riders %		Non-Riders %
2005	2004	2005	2004	2005
93	92	96	89	94
<b>72</b>	75	<b>57</b>	53	<b>35</b>
58	52	54	43	13
(n=74)	(n=108)	(n=67)	(n=76)	(n=62)

- Comparison to Spring '03 survey:
  - Message clarity (94% vs. 88%).
  - Message relevance (56% vs. 34%).
  - Message as motivation to ride (43% vs. 23%).
- Relevance and motivation may be lower in this wave than in 2004 because the current wave includes non-riders.
- Non-riders least likely to find the messages either relevant or motivational.

Base: *Recalled advertising (2005: 203; 2004:184)*  
 Q.21a-c *Next, I'm going to read you some phrases that may or may not apply to the public bus system advertising you saw, read or heard recently. After I read each phrase, please tell me whether it applies to the advertising or not.*

*Bolded numbers are significantly different from each other within pairs (p ≤ .05).*



Key themes recalled are either related to financial reasons / money or about convenience / ease of use. Regular riders more likely to recall “Affordability” as a theme than either occasional riders or non-riders.

AD RECALL

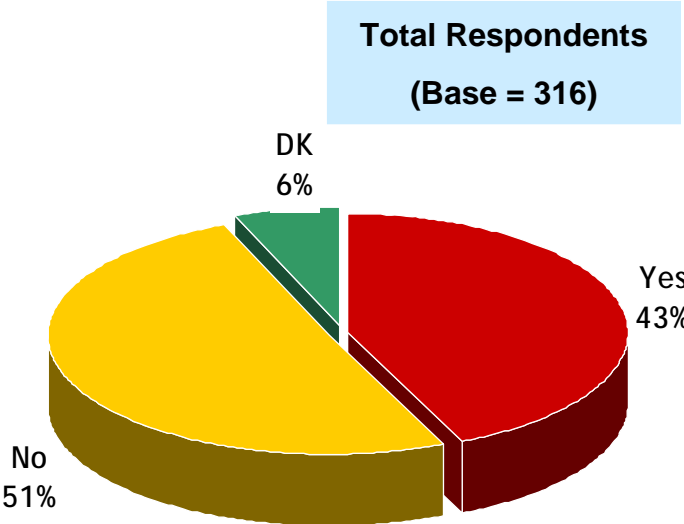
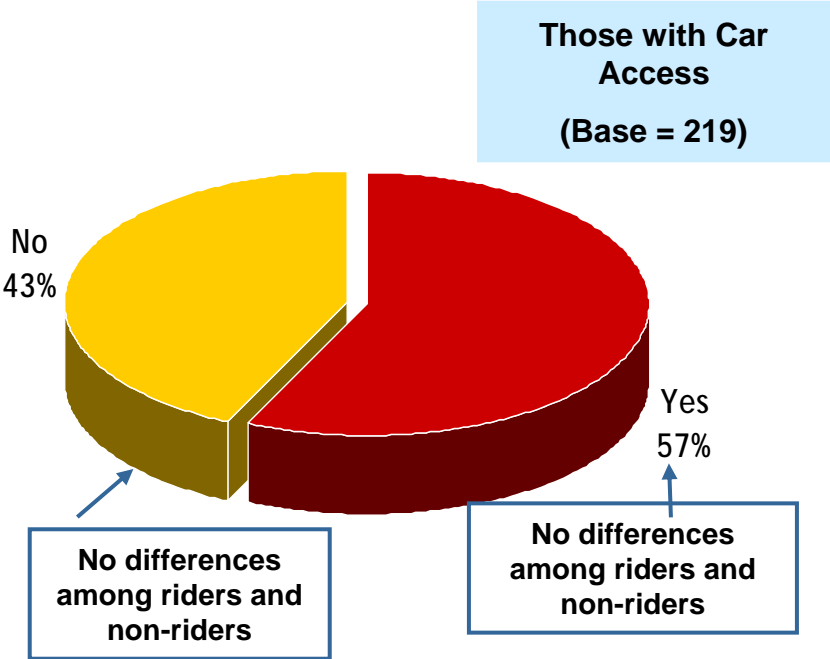
Ad Messages: Key Top-Of-Mind Responses	Total 2005 %	Reg. Riders 2005 %	Occasional Riders 2005 %	Non-Riders 2005 %
Convenient	14	12	10	19
Lower/Affordable rates	14	27	7	6
Cost effective	13	9	12	19
Increase ridership	12	13	13	10
General positive comments	12	12	15	13
Availability	9	6	10	15
Alternative transportation	9	8	12	11
It's a good form of transportation	8	7	7	10
Safety	7	8	4	5
Schedule information	6	6	7	5
General negative comments	5	5	6	5
Base among those who recalled advertising	(203)	(141)	(67)	(62)

**Note: Additional findings included in the appendix slides 41-44.**



# Over half of the respondents with car access say that rising gas prices have affected their driving habits or car use.

ALL RIDERS



Q.18A Over the past year, have rising gas prices affected or changed your driving habits or car use?



# Impact of Gas Prices on Driving Habits By Car Access

	Total Access to Car	Riders Access to Car	Non Riders Access to a Car
	Yes %	Yes %	Yes %
I am/We are making fewer unnecessary trips	43	37	50
I am/We are combining trips	42	36	50
I am/We are riding the local public bus more often	9	16	0
I am/We are using the SUV less often	6	9	2
I am/We are car pooling more often	5	6	3
I walk/We walk to places that I/we would have driven to in the past	5	3	7
I am/We are riding my/our bike(s) more often	3	3	3
Drive the speed limit/Reduce driving speed	3	3	3
Use my efficient vehicle more	3	3	3
I am/We are using public transportation more often	2	3	0
Other	17	10	20
Don't know	2	1	2
Base: Those with car access who said that gas prices have affected or changed driving habits/car use	(125)	(67)	(58)

**Key changes made by those with car access:**  
**Making fewer unnecessary trips and combining trips.**  
**Among bus riders, 16% say that they are riding the bus more often.**

