

your route. We'd like to talk to you." You could send them a survey. You can have focused, direct contact with them.

If, for example, a bus route is temporarily detoured, the agency no longer has to send out rider alerts and place them on every seat. Instead, it can simply call up the database for that route, send those customers a letter, personalized to them, saying, "Sam, we appreciate the fact that you're riding. Now, for the next few weeks your bus is going to be detoured. Sorry for the inconvenience. Let us know if there is anything we can do to help." You have established a relationship, a two-way conversation with your customers, that will help develop loyalty.

Summary

We must look toward the future and develop a mutually agreed upon relationship or definition between our customers and ourselves regarding service quality in the future. Until we have an agreed upon definition, we cannot know whether or not we are meeting the expectations of the customer.

We must also identify customer expectations. We have been fairly content in the public transportation industry to not look at what the customer expects. We think we know what they want. Once we have customer-defined expectations, we put them up against their perception of current service quality. With these expectations and our service statistics, we can develop a real focus for the transit agency.

There is one other element. Focus can only be achieved if there is a cultural change within a transit agency. All employees must understand their role in meeting customer satisfaction. In Minneapolis the agency lays out operational statistics against the customer expectation. Every month the results are publicized. What we are doing, how close we are to meeting customers perceptions. The Customer Satisfaction Index makes all employees aware of their role, their contribution in overall customer satisfaction. Listen to the customers, learn what they want, make changes in procedures, in policies and in processes that prevent you from meeting the customers' expectations.

By doing these things, the agency will be in a position to look five years down the road and say that this is what the customer of the future is going to want and we will be there before they know they want to get there. We will meet and exceed those expectations and lead the customers down the path instead of always transit being led down the path.

BIG RESEARCH AT A SMALL AGENCY

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This case study is intended to demonstrate that market research is important and achievable even in small transit systems. The small transit system is the Whatcom Transportation Authority (WTA). The WTA operates in Whatcom County, located northwest Washington near the U.S.-Canadian border. The WTA provides fixed-route service for the general public and specialized transportation service for the elderly and disabled. We're beginning to develop dial-a-ride programs for the general public and are in the process of starting a carpool/vanpool program. The WTA operates 26 bus routes using 27 peak-hour vehicles as well as a specialized transportation program using 26 peak-hour paratransit-type coaches.

Whatcom County has approximately 148,000 people. The city of Bellingham is the primary city in the area with a population of 55,000. Western Washington University, with 10,000 students and 2,000 staff and faculty, is our major trip generator.

The conditions we face in Whatcom County are as follows: there are no parking problems, except for Western Washington University and maybe some downtown areas. Seventy-four percent of the respondents to our market research said their employer or school provided either reduced or free parking. There are few problems with traffic congestion. Congestion in Bellingham lasts for about 15 minutes on major corridors. The air quality is great. The average commute distance is 9.1 miles. The perceived cost of operating an automobile is very low.

No parking problems. No traffic problems. No air pollution problems. For the WTA this means a one and one-half percent share of trips taken in Whatcom County. Still, there are a lot of opportunities to increase market share.

Market Research at the WTA: Overview Of Major Findings

The WTA used market research to determine the community's public transportation needs, to look at the its perceptions regarding public transportation, and to assist us in developing our mission statement, vision, and goals. We have also used market research to focus on the efforts the WTA should undertake to retain existing riders and to attract new riders.

The results of the market research had a profound influence on the development of our six-year Public Transportation Plan. The Plan identified our service delivery program and laid out the mission and vision for the WTA.

Market research was used to give us an idea of both the demographics of our ridership and non-riders and perceptions of our customers. In our general findings, we found that 37 percent of our riders rely on the bus for most or all of their transportation, 43 percent rely on the bus for some of their transportation needs, and 19 percent rely on the bus for a few of their needs.

Ridership is very stable, with approximately 46 percent of our ridership being long-time riders. Also, thirty percent of our ridership comes from the University, and every year we have a turnover of eight percent of our ridership because of the graduating senior and incoming freshman classes.

Riders are young; the average age is under 35 years old. Most of our riders, about 77 percent, are commuters traveling to work or school. Our riders, for the most part, have low annual incomes. We found that 49 percent of riders use the system because they are transit dependent. The primary purposes for riding the bus were for work and for school.

From the non-rider survey, we found that 53 percent said that under most circumstances they would not ride the bus, and 34 percent said they would never ride the bus.

Guidance for Future Service Development

Riders showed quite a bit of interest in extended hours of service and Sunday service. At the time of the research efforts, the WTA had operated services from 6:40 a.m. to 6:40 p.m. Monday through Friday and 9 a.m. to 6 p.m. on Saturday. Since almost half of our riders are transit dependent, it is logical that they wanted some increased service.

The major categories for which the market research provided direction were:

- What are customer expectations?
- What we need to do to maintain and retain ridership?
- What we need to do to capture non-riders?

Customer Expectations: The WTA in the early 1980s had a ridership of approximately 2.5 million riders per year. However, throughout the 1980s ridership continually to decline until 1989. Market research helped to direct the WTA's efforts to reverse the trend. Items of high importance included:

- personal safety at the Downtown Bellingham Transit Center;
- travel time; and
- time between buses.

The analysis also indicated what WTA was working well. We are doing a good job with safe bus operations, mechanical dependability, on-time performance, personal safety while riding the bus, clarity of timetables, and phone information.

In looking at the market research, our primary focus was what it will take to retain existing riders and gain new riders. In the development of the WTA's Public Transportation Plan, these three major issues, as well as others warranting attention, were addressed through specific service changes and facility improvements.

Personal Safety: Bellingham has a very low crime rate. It is a very safe area, but there was a city plaza adjacent to the transit center where a group of kids was hanging out. It was intimidating for people to walk through the area. There was occasional information in the news concerning the kids and it was always referred to as "a problem at the bus terminal."

Our market research found that elderly people and people with children did not want to ride the bus because of that perception of lack of safety. We worked with the City of Bellingham to lease the plaza at no cost. We removed the public seating—which probably goes against the grain of anything you hear about livable cities—and converted the area into a paratransit drop-off zone where we could have more integration between our fixed-route and paratransit services. And we built a large brick planter, in which we maintain seasonal decorative plants. We got rid of the problem and beautified the area.

System Safety: We received high marks for safety on WTA buses. Even though we are a small system, we stress safety to the point that we have dedicated 1.5 full-time equivalents for operator training and retraining. We continue to focus on maintaining appropriate behavior on WTA buses and at WTA facilities. We work very closely with local law enforcement to ban persons who fail to act appropriately at WTA facilities or on buses. These were all areas our market research indicated as important for market retention.

Improving Service - Travel Time Between Buses, Night Service: The market research identified a number of service issues, including direct service, decreased travel time, and having better connections. We have seen growing traffic, growing ridership, (which is a nice problem), and more traffic lights. All of these have led to developing on-time performance problems. We are also looking into solving our on-time performance problems and providing more opportunities for riders to travel to their primary employment and retail locations without having to go through downtown Bellingham. We are considering increasing frequency along major corridors and developing bi-directional loop routes that serve major trip generators. We are looking at ways that we can work with our customers to facilitate more rapid boardings and alightings—including having the fare ready at the time of boarding—and save time for our riders. We are currently going through a major systems analysis and hope to implement needed changes very soon.

Another thing that we have found through the market research work was the importance of evening service to our customers. So we implemented evening service through our “Nightline” route. We have extended our evening service until 11:20 p.m. on a primary corridor that serves major concentrations of population and retail areas in Bellingham.

Service Reliability: The WTA has a long tradition of high mechanical dependability. We have not missed a scheduled run due to an equipment failure. We place a lot of effort into maintenance. Additional equipment is also stationed at the Transit Center in the event an operator needs to make an equipment swap. We also have terminal expeditors and supervisory staff that are able to make a vehicle swap en route if there is a mechanical failure and cover the next departing run. This reliability is important to customers.

Bus Passes: Market research also revealed a need for a monthly bus pass. The 25 cents fare had been in place since 1980 so we did not see a need for a bus pass. In April of 1995, our fares went to 35 cents, and we implemented a \$10 a month bus pass. In May of 1995, our ridership was up 16 percent from May 1994. Our customers had spoken, and they said, “Give us a bus pass, we’ll use the bus more.”

Market Niches

We also looked at opportunities to increase ridership. We used this information to target promotions where should we put our efforts to increase ridership. This is very important given our limited marketing budget.

We have worked extensively with Western Washington University, one of our major market segments, to develop a student bus pass and with targeted marketing at the university. The University has a number of characteristics which make it a good transit market, including dense student housing located on and adjacent to the campus and 12,000 students and staff with limited parking. This year we also have an agreement with the University to provide additional bus service. Though it is only a \$100,000 contract at this time, we hope to eventually establish a universal bus pass and develop more programs.

We have also found, in our market research, that we get high marks for the clarity of information on our schedules. Since we operate on a radial pulse system with clock-face timetables, it is easy for people to remember schedules. Recently, though, we have found that, with the on-time performance problems, we may have to move off that clock-face system. So this year we are developing a system route map and timetable booklet with individual route maps. We conducted customer and non-rider surveys to determine which format would be easier to understand and read. The surveys involved an intercept interview with people on the street.

Given that 49 percent of our individuals are transit dependent, we have looked at how can we meet that market better. One thing we do in our marketing and promotions program is that twice a year we have a transit dependent free-ride coupon where we work very closely with social and health service agencies. The caseworkers of those organizations appreciate getting those free ride coupons and we were wanting to increase ridership in that market. Also, through our ADA outreach specialist we meet on a quarterly basis with social and health services providers to better coordinate our services for fixed-route and specialized transportation.

Focus Groups

We discovered the benefit of focus groups in the public involvement process. We use focus groups to try to get a more balanced view of the public's perception than that received at poorly attended public meetings. Focus groups were used by the WTA to:

- develop transportation plans;

- develop standards for specialized transportation services for the elderly and disabled; and
- establishment local service corridors and areas for paratransit services.

WTA used to provide "ADA level service" throughout the county but we were finding that we just couldn't do that anymore with increasing demand, so we have developed levels-of-service standards that vary by population densities. We had to define what our corridor service levels were for that service. We have used focus groups and fare policy analysis and facility sitings, and so forth. We find those to be very effective means of getting information from our customers and the public about what type of needs they have.

Summary

WTA spent approximately \$20,000 on market research efforts when we developed our Public Transportation Plan in 1992. It was a bargain for all the benefit received. We have been able to use that information effectively in the development of service planning and marketing and promoting our programs, and we also picked up techniques that have assisted us in public involvement.

I close with one statement, "There is nothing more rotten than a bus seat that goes unfilled." Seat by seat, we want to fill our buses, and we feel that market research can assist us in that effort.