

PART II

ENHANCING THE VISIBILITY AND IMAGE OF TRANSIT IN CANADA

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1 EXECUTIVE SUMMARY

In today's growing and expanding cities and metropolitan areas, public transit provides a valuable, yet not fully tapped, solution to increased community needs. Each day the imperative for public acceptance and use of public transit increases.

Strengthening the image of public transit by building upon existing positive perceptions is critical to the viability of the industry.

Originally, this project was intended to build on earlier US image and ridership research and conduct new research to develop a communications strategy that will guide US national and regional efforts aimed at enhancing the visibility and image of public transit. The Canadian component of this project was conducted in an effort to determine if those messages that resonated with the American public would also ring true with Canadians.

This *Executive Summary* highlights findings from all phases of this project. All primary research findings are based on research conducted in areas with an existing public transit system offering one or any combination of bus, commuter rail, light rail, or heavy rail services.

Overview

In Canada, as in the United States, the current image and position of public transit is relatively weak. Public concern for public transit pales in comparison to other key public issues like health care, crime, education, the local economy, and air and water pollution. In addition, in terms of favourability, public transit falls in the upper-middle tier of industries.

Also similar to the United States, Canadian public transit suffers from the low levels of concern people have for transportation issues: people support those things they perceive provide solutions to their greatest problems. In addition, although more than three-quarters (80%) of the public has used public transit at least once¹, just less than two-thirds (63%) claim familiarity with the specifics of public transit services.

Evidence clearly suggests that increased awareness and familiarity with public transit increases support. Increased familiarity with the dominant message orientation tied directly to personal values offers the greatest promise. The *Community Benefit Built on Personal Opportunity* orientation has strong appeal across all regions, types of systems, and demographic subgroups. Importantly, given the objectives of the Canadian component of this project, **this message orientation is the strongest in both Canada and the United States.**

Swing supporters (those who are neither supporters nor non-supporters) are the primary audience targets. In addition, Influentials (the one-seventh of the population most actively involved in a community) comprise an additional important target audience.

¹ The relevant time frame for this question is at any point in one's life (e.g., "ever").

Given the similarities that exist between US and Canadian attitudes and opinions regarding public transit as well as the recommended message orientation, there are clear opportunities for collaborative efforts in order to strengthen the image and visibility of public transit.

Key Findings

The following points highlight the key findings of this research. Implications of the findings are inserted where appropriate and identified by the “✓”.

Across the board, Canadian perceptions are largely consistent with those found in the American research. As a result, if desired, it is possible for synergies to exist between the American and Canadian transit industries with respect to developing messages designed to enhance the image and visibility of public transit.

The Public's Priority For Public Transportation

- Transportation issues are not high on the public agenda. Other more burning issues like *health care* (7.8 on a 1-10 scale), *crime and safety* (7.0), the *quality of education* (7.0), the *local economy* (6.9), and *air and water pollution* (6.7) far overshadow *transportation issues* (5.9).
 - ✓ **As expected, the need for public transit solutions is perceptually NOT recognized or appreciated currently.**
 - ✓ **To make public transit important, it must be linked to other issues that people care about, or it must be seen as a means to deliver or support key personal values.**

Familiarity And Attitudes Toward Public Transportation

- Although more than eight-in-ten of all Canadians (88%) are aware that public transportation is available in their local community or region² and more than three-quarters (80%) have used public transportation at least once in their lifetime, just slightly less than two-thirds (63%) say they are familiar with the specifics of public transportation services in their area.
 - Slightly more than one-third (36%) say they are not familiar and nearly one-in-five (18%) say they know nothing about public transportation in their area.
- Positive feelings for public transportation (6.7 on a 10 point scale) lag behind other industries and associations. In the US, other studies reveal that associations like the American Cancer Society (7.8) and American Red Cross (7.8) define the top end of rated organizations. Other industries like the paper industry (6.6), steel (6.4), electric utility industry (6.4), telecommunications (6.4), American Medical Association (6.2), and trucking (6.1), define the upper middle of organizations rated. Lumber (5.8), natural gas (5.5), the healthcare industry (5.1) and coal (5.0) define the lower middle. Public transportation falls into the upper middle. Industries like chemical (4.9), oil and gas (4.6), nuclear (4.4.), managed care (4.2), and tobacco (2.8) define the lower end of industries rated. Note: These scores come from a great variety of studies conducted in the United States by the research team over the last few years. Scores are adjusted to a common 1-10 scale. As comparable Canadian data is not available, these results are provided purely for comparison and contextual purposes.
- Not surprisingly, public transportation users feel much more favourably toward public transportation (8.3 and higher for different types of transportation users) than non-users.
 - Overall, people most familiar with public transportation rate it the highest (7.4) and people least familiar rate it lowest (6.4).
 - ✓ **The lack of familiarity accounts in large part for the lukewarm feelings regarding public transit. More importantly, familiarity with public transit clearly breeds greater favourability. Making everyone familiar and appreciative of the positive benefits of public transit in an image campaign will increase the level of support for public transit.**
- Although *public transportation* does not rate as high as desired (6.7), it is still clearly more positively perceived than the specific modes of public transportation such as *bus* (6.3) or *rail*

² All survey respondents are drawn from communities or regions with public transportation systems.

(4.4). In terms of preferred terminology, *public transit* is much more positively perceived than *mass transportation*, *public transportation*, or *mass transit*.

- ✓ **Whenever possible and appropriate, communications in Canada should use the words “public transit” rather than “bus” or “rail.” “Public transit” should also be used instead of “mass transportation,” “public transportation,” or “mass transit.”**

- Principal reasons for not liking public transportation include *time consuming* (25% of all dislikes mentioned), *inconvenient schedules* (22%), *crowded* (17%), and *lacks availability/access* (16%). It is likely that the public’s perception of the transit industry is primarily influenced by their attitudes about operational aspects of public transit services.
- People like public transportation because it is *good for the environment* (16% of all likes mentioned), *convenient* (14%), *quick* (11%), *inexpensive* (10%), and *available* (9%).

Key Targets

- Based on the different ratings given to public transportation, support for public transit can be divided into three groups: supporters (50%), swing (29%; people who are neither strong supporters nor non-supporters), and non-supporters (18%).³ In contrast, in the United States, 36% were defined as supporters, 33% as swing, and 31% as non-supporters.
 - ✓ **The challenge of enhancing the image and visibility of public transit is not as formidable in Canada as it is in the US, where nearly one-third of all Americans do not support public transit.**
- However, in Canada as in the United States, the supporter base is made up primarily of urban dwellers, people with low-income levels, students, single parents, and other users of public transportation.
 - ✓ **In this case, the first axiom of communications targeting and coalition building strategy does not apply. In almost all cases, communications targeting and coalition building seeks, first, to strengthen and invigorate the base of supporters and, second, to expand the base by converting the swing. In the case of public transit, targeting supporters does little to increase the level of support for public transit issues. Given that the base of supporters will react positively to most any message about public transit, the first priority should be to target messages at the second most important group—swing supporters.**

³ This classification is based on a common segmentation for a 1-10 scale in which respondents with ratings between 8-10 are considered supporters, respondents with ratings between 5-7 are considered swing, and respondents giving a rating below 5 are considered non-supporters.

- In Canada, half (48%) of the non-supporter group and 46% of the swing group admit they are not familiar with public transportation. In addition, it is important to note that most of the non-supporter and swing groups have positive things to say about public transportation.
 - ✓ **There is plenty of room to increase familiarity and awareness of the positive aspects of public transit and generate support for transit issues among the non-supporter and swing groups.**
- A significant number of Canadian non-supporters (51%) and half (54%) of the swing say they are already familiar with public transportation.
 - ✓ **This fact reminds us that increased familiarity with the current stereotype of public transit products and services will ultimately have a limited overall impact. Past personal experiences with public transit among many of non-supporters and swing already have helped to form the current lukewarm image of public transit. Additional new information and new linkages to personal values will be required to improve the perception and support for public transit among these members of the non-supporter and swing groups. This fact also underscores the difficulty required to bring about high levels of support ultimately desired over the long term without changing the experience upon which their familiarity is based.**
- For the most part, the profile of Canadian swing supporters is nearly identical with the profile of the general public.
- About one-in-seven (14%) Canadians are considered to be Influentials due to the fact that they play a larger role in shaping public opinion.⁴ There is no significant concentration of Influentials among non-supporter, swing, or supporters groups.
 - ✓ **In addition to swing supporters, Influentials are an important group to target due to the role they play in shaping public opinion. Targeting Influentials can magnify the impact and efficiency of the overall message and campaign.**

⁴ Influentials have done at least four of the following activities:

- regularly read editorial page;
- written or telephoned radio or television station to express opinion;
- taken active part in some local issue;
- written to the editor of a magazine or newspaper;
- worked for a political party or candidate;
- spoken at a public meeting;
- written or visited public official about some matter of public business; and
- written or said something that has been published.

Key Messages

- There are many messages that differentiate public transit in a positive way on important issues. In fact, Canadians believe that communities with public transportation do better on all twelve criteria (e.g., provides lots of transportation choices and options) tested than communities without public transportation. This finding is consistent with that discovered in the United States.

✓ **This fact demonstrates that there are many messages capable of improving the image and increasing support for public transit—many arrows in the quiver with the potential to have an impact.**

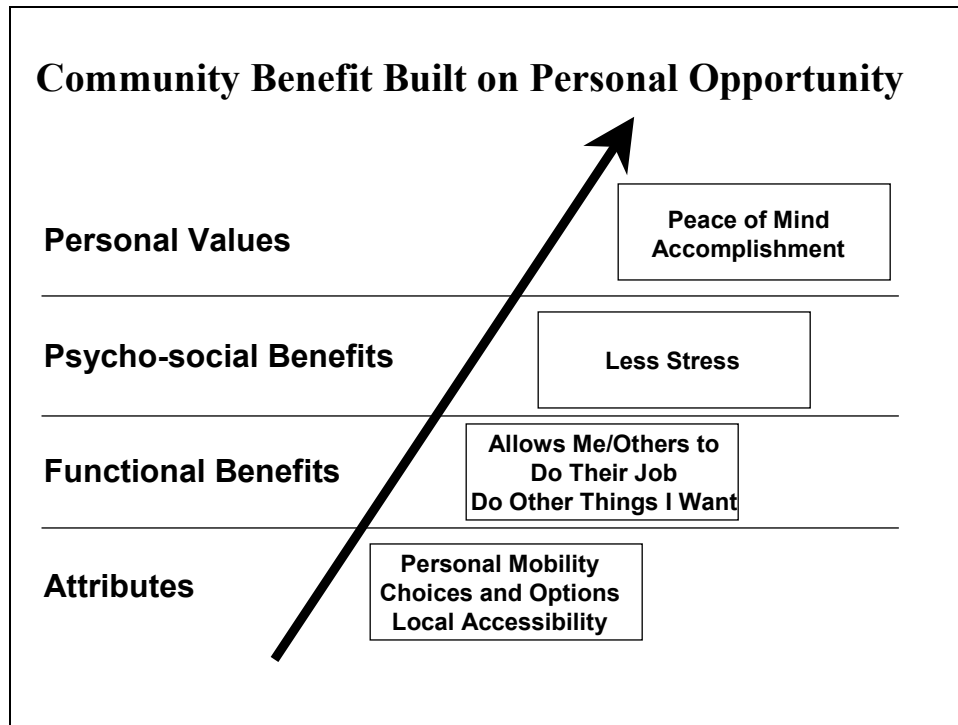
- Based on both the importance of different themes and the comparative benefit of these themes in cities with and without public transportation, the most powerful messages are built on the following themes:

- Providing **opportunities for people from every walk of life**;
- Having **lots of choices and options** available;
- **Easy access** to things one needs in everyday life; and,
- Having **mobility and freedom** to do what one most wants to do.

➤ The values research (both in Canada and the US) provides additional direct support for this finding. The dominant values orientation—*Community Benefit Built on Personal Opportunity*—uncovered in the qualitative research is built on the *opportunities* provided by *mobility, choice, and accessibility*:

The opportunities made possible by personal mobility, access, and transportation choices help people to be able to *do their jobs or get other things they want done*. This makes people feel *less stress*, and more importantly feel greater *peace of mind* in their ability to *accomplish* things that are most important to them.

Collectively, the whole community benefits by the fulfillment of many individual personal opportunities.



- It is important to recognize that this is the dominant values orientation for non-riders—not just riders. It is important to many non-riders— though not all non-riders—to increase their own *freedom* and *mobility* by having extra *options* and *choices* available to them. Perhaps more importantly, non-riders want people from all walks of life in their communities to have similar opportunities. Non-riders feel a personal benefit in seeing others in their community enjoy personal *accomplishments* and *fulfillment* due to their ability to exercise transportation options.
- ✓ **The personal opportunities provided by choice, access, and freedom/mobility enabling the whole community to accomplish what is important to them presents a powerful theme that can effectively be used to leverage support for public transit.**

2 INTRODUCTION AND REPORT ORGANIZATION

Introduction

The research team is pleased to present the final report for TCRP Project B-20A: *Enhancing the Image and Visibility of Transit in Canada*. In addition to reporting primary research findings and subsequent strategic recommendations, this report also documents all activities affiliated with this project.

It is important to note that the Canadian component of this research was intended to mirror the work conducted in the United States. As a result, the triad moderator's guides and quantitative questionnaire are similar to those used in the US; slight modifications were made to reflect the unique nature of Canada. All analyses performed are also similar. In order to provide context and greater understanding to the research team, a modified Situation Analysis and Media Audit were also conducted. Those results are summarized in the relevant sections of this document. A Strategic Plan was also prepared.

Report Organization

Project research goals are recapped in the *Research Objectives* section of this document.

The philosophical approach that provides the grounding for this effort is described in the *Review of Philosophical Foundation and Conceptual Approach*. This section details the approach taken in conducting the research and articulates why this approach best accomplishes the research objectives. This report component includes a discussion of Criteria for Strategy Development, thoughts on Managing Image, and details the approach for understanding personal values, the keys to consumer decision-making.

The *Situation Analysis* summarizes existing perceptions of public transit, based upon research provided by the public transit agencies as well as the Media Audit. This component of the overall effort was conducted in order to provide context and further understanding to the research team.

The *Research Methodology* chapter provides details on the qualitative and quantitative research conducted. Specifics of the research methodology, including screening, sampling, questionnaires, data collection, and analysis are included.

All research findings, highlighting those insights relevant to understanding current perceptions of public transit, are reviewed in the *Detailed Findings* section. Specific targets and messages to enhance the visibility and image of public transit are described. All supporting materials, such as the Triad Moderator's Guide and the Quantitative Questionnaire are included as *Appendix* material.

A recommended Strategic Plan, outlining key imperatives, has also been included.

3 RESEARCH OBJECTIVES

In the eyes of some, public transit has long been at odds with the personal freedom, mobility, and independence that one's automobile provides. Nevertheless, in today's growing and expanding communities and metropolitan areas, public transit provides a valuable solution to increased congestion, pollution, and need for access. Each day the imperative for public acceptance and use of public transit increases.

Strengthening the image of public transit by building upon existing positive perceptions is critical to its long-term viability.

In the United States, this project was intended to build on earlier image and ridership research and conduct new research to develop a communications strategy to guide national, regional, and local efforts designed to enhance the visibility and image of public transit in order to create a more positive and supportive environment for public transportation. The Canadian Extension is intended to determine the extent to which possible synergies exist between the United States and Canada with respect to messages designed to strengthen the image of public transit.

Elements of this communications strategy include:

- Identification of target audiences—those with the greatest potential to contribute the greatest amount of support for public transit;
- Development of a range of strategic messages and approaches anchored in the most powerful emotions and personal values; and,
- Identification of appropriate tactics for effective implementation of campaigns on a national, regional, and local level.

It is the hope that a positive communications campaign building general support for public transit will lead to ridership increases in the long run. In addition, research results can – and should – be used to stimulate thinking on new and innovative ways to encourage ridership.

4 REVIEW OF PHILOSOPHICAL FOUNDATION AND CONCEPTUAL APPROACH

The research approach guiding the research team's efforts is based on a conceptual foundation that the team has discovered holds true in all successful communications strategies. This foundation builds upon proven criteria for successful communications strategies, incorporates elements of managing image, and requires an understanding of motivating personal values that are specific to the situation and context at hand.

The approach to this challenge is predicated upon the assumption that personal values are the key to consumer decision-making. Key attributes of supporting public transit constitute the means to lead to personal functional and psychological benefits, which ultimately foster deeply held personal values. By positioning public transit in a way that triggers these perceptual orientations, and by communicating to audiences in a way that triggers these important personal values, the audience's perceptions and behaviors can be influenced. In summary, **effective communications not only must persuade by reason, but also motivate by emotion**. The research that has been followed in all aspects of this project was designed to uncover the most effective rational and emotional communication leverage points.

Elements of this foundation are outlined below.

Criteria for Successful Communications Strategy Development

The following criteria have been and are used consistently and successfully by the research team for the development of a strategic communications program of the type required for this project. These guiding principles were applied throughout the duration of this project.

- First, messages do not operate in a vacuum. Messages must be evaluated in light of alternatives and their strengths and weaknesses.
- Second, a strategy should build upon the positive impressions that currently exist among a target audience. The communications strategy must be consumer driven. The target audience research previously conducted provided the research team with knowledge of audience concerns and emotions as the audience expresses them.
- Third, the strategic positioning for communication of a service must be broad enough to endure over a long period of time and under a variety of circumstances.
- Fourth, the communications strategy should not oversell. However, the strategy can and should raise the aspiration levels and the strengths of the service among target audiences.

- Fifth, the communications strategy should be unified across a variety of audiences, channels, and programs. In other words, its various executions must be based upon a common strategic underpinning that will resonate with most stakeholder groups.

A powerful communications strategy promises certain benefits:

- Capitalizing on public transit's strengths or equities will pave the way for development of a successful positioning and identity. A leverageable positioning/identity has the following advantages:
 - ◆ Key audiences will be more likely to hold public transit in high esteem in absolute terms and relative to alternatives.
 - ◆ Consumers will be more likely to select public transit as a viable transportation option for themselves and/or others.
- Building an identity within key market segments will enhance expansion through greater recognition, preference, and support for public transit by consumers.

A strong positioning or identity can support and be supported by communications from all of public transit's key internal stakeholders (e.g. the national and regional organizations interested in implementing image campaigns). A coordinated communications plan that incorporates similarities in overall message and themes is not only more powerful, but also more efficient and cost effective.

Managing Image

Whether or not an entity actively manages it, virtually all organizations and industries have an image. Image is defined as the set of ideas and impressions, both rational and emotional, which major stakeholders form about the organization or industry. Public transit is no exception. This image is not formed solely from the set of hard attributes conveyed directly by the entity. Often, organizations are assigned the image of the industry; they inherit an image by default; or their image is based upon uninformed perceptions/ideas about the organization.

Regardless of the source of the image, and whether or not it corresponds with the organization's own view of its image, an image can and should be managed. Understanding an organization's and an industry's image is the critical precursor to managing that image. This encapsulates the objectives of this project: *understanding the current image of public transit and providing strategic guidance in order to manage that image so that it ultimately fits with the desired image of public transit.*

Four Framing Questions

The first step in managing the image of public transit is to identify the current images held by its key target audiences. By gaining a thorough understanding of key audiences' drivers of image, perceptions of “who” and “what” public transit is and the variables affecting how this image is formed, industry constituents can leverage the strengths of public transit. Also, by understanding the strengths and weaknesses of the alternatives, in this case, competing modes of transportation, the public transit industry can determine how best to position public transit versus these alternatives to maximize its perceptual equities and minimize its perceptual disequities. To achieve the necessary understanding the research team strove to answer four key questions:

- ***Who is your supporter?*** While recent and prospective public transit users are always important, image programs are often targeted more broadly to the general public and a wide range of consumer groups. In this case, it was assumed the consumer group of interest was primarily those who do not currently use public transit. However, as any positioning must resonate with current users, these individuals were also included in the research.
- ***What do your potential and existing supporters currently think or believe about your service?*** What are the variables that affect how image is formed in the minds of both non-users and users? What do you want your supporters to think or believe about public transit? What supporters *actually think* about public transit is public transit's **image**. What you *want* supporters to think about public transit is public transit's **positioning**. The challenge of a coordinated communications strategy is to ensure that **public transit image mirrors public transportation's positioning over time**.
- ***Do you have all the information to know what differentiates you from alternatives among your key audiences?*** Do you understand current and/or potential barriers that you face? Are you aware of untapped opportunities?
- What is the ***leverageable concept or idea*** that can link key product attributes and benefits to values and emotions that drive the decision to support, or not support, public transit in order to help move customers from what they may currently think about public transit to what you want them to think about public transit, that is, from not supporting public transit to supporting it?

Personal Values: The Key to Consumer Decision-Making

Over time, the research team has determined that personal values are the key to consumer decision-making. As a result, an approach has been developed that assists clients in strategic positioning and communications development. The basic philosophy of this approach is as follows:

- Personal values drive behavior in humanity all over the world. These values include, but are not limited to, self-esteem, personal security, belonging, self-preservation, eternal salvation, love of family, peace of mind, etc. The importance of values are viewed at a micro or individual decision-making level, in this case, unique to perceptions of public transit.
- The personal values that are most dominant in driving behavior for a given decision must be identified; namely, feeling favourably toward public transit.
- These driving values help to identify the most important rational and emotional benefits to consumers. These benefits in turn help to focus our attention on the most important tangible aspects of the image of public transit.
- The approach is based on means-end theory. This suggests that key values are an end. Key attributes of supporting public transit constitute the means that lead to personal functional and psychological benefits, which ultimately foster (or impede) deeply held personal values.
- The "**pathways of thought**" which drive behavior can then be understood.
- By positioning public transit in a way which triggers these important "pathways of thought" or "perceptual orientations" and by communicating to audiences in a way that triggers these important personal values, the audiences' perceptions and behaviors can actually be influenced. Furthermore, this information can be used to drive marketing decisions and positioning in the future.
- **Effective communications not only must *persuade by reason* but also *motivate through emotion*.**

Values in Strategy Assessment (VISTA™) Framework

VISTA™ is a unique research method developed by Wirthlin Worldwide that goes far beyond the traditional understanding of consumer benefits to identifying the most personally compelling consumer values that must be “tapped into” in order to achieve a successful outcome. The outcome of VISTA™ is a set of maps depicting consumer decision-making relative to a specific context or entity that give a blueprint for action, immediate and long-term. For this project, the VISTA™ approach was applied via triad discussion groups and then quantitatively validated in the telephone survey. Additional information on the VISTA™ methodology can be found in Appendix A.

The research team has found it essential to include *both* the emotional and the rational elements in developing a successful communications strategy. A consumer should think *favourably* about public transit (emotional) and have a solid *justification* for that support (rational). Clearly, both the rational and emotional elements that work to our advantage and differentiate public transit from alternative forms of transit need to be identified and highlighted. These elements are critical to controlling the communications and thus, managing image.

Brand Force™ Model

Fundamental to the development of a new paradigm for public transportation is an understanding of the old paradigm. An essential framework called a Brand Force™ is used to put these paradigms into simple, definitive terms that can be used to guide communication strategies and product development. Brand Force™, a proprietary branding model developed by FJCandN, Wirthlin Worldwide’s partner for the US research, was used to determine how public transportation is perceived today (taken from the primary and secondary research findings) and how it may be perceived tomorrow (after executing a national and regional repositioning/image campaign). Both brand models identified three key attributes:

- *Brand Essence*: The one thing public transportation stands for in the minds of its stakeholders.
- *Brand Benefits*: The personal relevance public transportation brings to its users; how it fits into people’s lives and their community.
- *Brand Personality*: The personification of public transportation in terms of human characteristics (e.g., slow-to-respond, old-fashioned, and confused vs. proactive, modern, and well organized).

This *Brand Statement* summarizes the Essence, Benefits, and Personality of the Brand.

The elements of the Brand Force™ model provided the foundation for message development as well as the basis for key strategic recommendations in order to move public transportation’s brand from today’s reality into tomorrow’s goal. Note: the Brand Force™ developed for the US was applied to the research in Canada.

5 SITUATION ANALYSIS

This brief Situation Analysis was conducted in order to provide context for the balance of the Canadian research effort as well as to begin to understand the similarities and differences between the Canadian and US industries. These findings are based upon research reports provided by the Canadian transit agencies themselves as well as industry literature provided by CUTA.

With respect to image and perception, the situation facing the Canadian transit industry is largely the same as in the United States. As is the case in the US, no one factor determines the extent of travel via public transit more than ownership and availability of a private automobile. The personal vehicle remains the transportation mode of choice, primarily due to the speed and convenience an individual car provides. Many Canadian transit users elect public transit by choice but would not hesitate to switch modes if driving were to become easier.

Canadian residents who like public transit do so because the systems' operational characteristics meet their needs. Those who do not have positive perceptions of transit have the opposite opinion. Positive characteristics mirror those mentioned in the US and include dependable, better for the environment, clean, comfortable, efficient/fastest way to commute, comfortable, and stress-free. Negative perceptions include poor service, too slow, crowded, limited accessibility, inconvenient, and uncomfortable. The Canadian transit industry, as its US counterpart, suffers from a lack of prestige: although many support the concept of public transit as it provides a needed service, it is not "for people like me."

Moreover, both the United States and Canada share the challenge of funding for public transit. In Canada, transit has lost funding as part of government restructuring. As a result of these funding decreases, service has been reduced and fares increased, thus making transit less competitive. In addition, automobile owner and operating costs have declined relative to public transit.

In contrast to the United States, there is a stronger focus on the role that public transit must play in the future of the country. The Canadian government has invested more than \$150 million in the National Climate Change Strategy designed to help Canada achieve its emission reduction commitments stemming from the Kyoto Protocol. Many believe that any successful transportation solution will have to include a major modal shift to transit. However, affecting this modal shift will prove to be quite complex, particularly in light of the environment in which public transit is currently operating.

Media Audit

In an effort to understand how public transit is portrayed in the Canadian media, a Media Audit was conducted. Information for this audit was gathered by searching the Lexis Nexis database for articles in Canadian publications that included the key words "public transportation," "public tran-

sit,” “mass transit” and “mass transportation.” The relevant time frame for the search was January 1, 1999 – May 30, 2000. Although there are articles included from French-speaking regions of Canada, the search was conducted in English and therefore may exclude some relevant articles from this region⁵. In total, 317 articles were analyzed. The bibliography is included as Appendix B.

Key findings generally go hand-in-hand with the perceptions outlined above.

- The trends most frequently cited include *traffic congestion* (16%), *pace of growth* (7%), *quality of life issues* (7%), *decreasing air quality due to pollution* (5%), *suburban sprawl* (4%), and *societal violence* (4%). *Increasing gas prices*, *work hour flexibility*, *parking shortage*, and *alternative fuel usage* were included in less than 3% of all articles reviewed.
- The tone of the published articles is relatively evenly split between those where transit is painted in a more positive light (52%) and those that are more negative (48%). In the US, there were nearly twice as many positive mentions of public transportation as negative mentions.
- Positive mentions of transit published most often include *better for the environment* (9% of all mentions), *avoids/minimized congestion* (7%), *needed service/helps elderly/persons with disabilities* (5%), *convenient* (5%), and *customer service has improved* (4%). These mentions mirror those found in the US.

Table 1

Positive Perception	Frequency of Mention⁶
Better for Environment	9%
Avoids/Minimizes Congestion	7%
Needed Services/Helps Elderly	5%
Convenient	5%
Customer Service Has Improved	4%
Safe	4%
Better Value than Driving/Good Value	3%
No Traffic	3%
Efficient	3%
Improves Quality of Life	2%
Goes Where You Want to Go	1%
Easy to Use	1%
Less Stressful than Driving	1%

When the relationships between frequently cited trends and positive perceptions are analyzed, it is not surprising that *avoids/minimizes congestion* is often mentioned in conjunction with the

⁵ 27% of articles were found in Quebec City/Montreal papers, 27% from Vancouver, 23% from Toronto, 6% from Ottawa, and 3% from Calgary. An additional 8% were categorized as “national” articles. The balance of articles were from papers in other Canadian locations.

⁶ Calculated among all articles.

trends of *traffic congestion* and *pace of growth*. Being a *needed service* was most often mentioned in conjunction with trends regarding *quality of life issues*.

- Negative mentions of transit include *funding cuts/lack of funding* (8% of all mentions), *inconvenient* (6%), *rates are increasing* (5%), *unsafe* (4%), *not reliable/dependable* (4%), and *too time consuming* (3%). These mentions also mirror those found in the US.

Table 2

Negative Perception	Frequency of Mention
Funding Cuts/Lack of Funding	8%
Inconvenient	6%
Rates are Increasing	5%
Unsafe	4%
Not Reliable/Dependable	4%
Too Time Consuming	3%
Not a Better Value	2%
Not Better for the Environment	2%
Doesn't Improve Quality of Life	2%
Complicated/Not Easy to Use	1%
Doesn't Go Where You Want To	1%
Not a Needed Service	1%
Not in Control of Drive/Commute	1%

- Half (50%) of the articles reviewed use the terminology “public transit.” The specific system name was mentioned in 22% of the articles. “Transit” appeared in one-in-five (19%) articles. “Mass transit” and “public transportation” were mentioned in fewer than one-in-ten (10% and 8%, respectively) articles.

6 RESEARCH METHODOLOGY

Overview

The overall objective of the primary research conducted in the United States was to test the messages developed among the populations of interest. As the messages were considered to be “testable hypotheses,” that is, suitable for testing but likely to be revised based on research input, and because these messages were primarily developed from secondary research that is almost exclusively ridership-focused, a combination of qualitative and quantitative methodologies was implemented to accomplish these objectives.

Consistent with the VISTA framework, the qualitative research component was designed to further develop the emotional underpinnings (personal values) of perceptions of and attitudes toward public transportation. Moreover, the qualitative phase of research was also designed to elicit input on the messages in order to refine them prior to quantitative testing. The subsequent research phase was designed to quantitatively validate the messages, to determine ideal target audiences, and to determine which messages resonate with each target audience.

The overarching objective of the Canadian research was to determine the degree to which synergies between the US and Canada are possible. As a result, it was determined that the Canadian research design should mirror, where appropriate, that which was employed in the United States. Both the qualitative and quantitative phases of the research were performed in Canada. Given the Canadian research goals, new messages were not developed. The qualitative component was conducted to determine the extent to which the pathways of thought were similar. Messages were then quantitatively validated. In order to accomplish the overall goal of this project, significant effort was paid to comparing and contrasting US and Canadian results.

Qualitative Research: Triad Discussion Groups

Research Methodology Selected and Rationale

As stated in the Review of Philosophical Framework and Conceptual Approach section of this document, the research team’s approach to communication strategy development is predicated upon the belief that effective messages “persuade by reason and motivate through emotion.” Importantly, both the rational (attributes) and emotional (values) elements must be linked to the particular service or situation under study.

In the research team’s experience with approximately two dozen nationwide (US) industry image and communication campaigns, it was found that most existing research and information focuses on the attribute level, but is not specifically linked with motivating values. A review of existing transit industry research – both in the US and Canada -- validates this result specifically for the image of public transit. That is, although the values that are important to the American and Canadian publics are known and one can hypothesize about those that are relevant to public transit,

which of these values relate to the attributes of public transit, the functional benefits of using public transit, or the psychosocial consequences of these benefits are not known with certainty. Without the linkages between elements, one is unable to develop a model of consumer decision-making, incorporating both rational and emotional elements, with respect to public transit. Therefore, a qualitative research phase was included in order to validate this information and to refine the emotionally based messages.

Triad Approach

The triad research approach involves the use of approximately three respondents in a small group qualitative discussion. The use of triads is based on a philosophy of consumer immersion, a philosophy of obtaining in-depth information by becoming immersed in a lengthy, detailed discussion with few respondents versus obtaining surface information by asking fewer questions of many respondents. The use of triads leverages the advantages of focus groups by retaining group dynamics, which encourage momentum and invite lively interaction, while still providing the depth and richness of a more personal one-on-one discussion.

The triad methodology is particularly conducive to values-based research approach (collecting the needed attribute, consequence, and values information) as experience indicates that respondents are more willing to discuss these topics in a small group setting than in a larger group. Furthermore, should a respondent have difficulty with the questioning, the moderator will have more time to resolve the issues and obtain valuable information. By contrast, in a focus group setting this information is often lost. In order to ensure adherence to values laddering protocol, key research team members—all trained in the VISTATM methodology—facilitated each triad discussion.

Sample Design and Selection

In selecting locations in which to conduct the triad discussions, the aim was to select areas that are diverse with respect to geographic location, system size, and population demographics. With these criteria in mind, triad discussions were conducted in the following areas:

- Toronto and Kitchener
- Vancouver and Victoria
- Montreal and Sherbrooke

In each of the three larger cities (Toronto, Montreal, and Vancouver) two groups were conducted: one with riders and one with non-riders. In the smaller cities, only one group was conducted among non-riders. In total, nine group discussions were conducted. As the objective was to understand how to enhance the image and visibility of public transit, it is most important to focus on those individuals who are not currently experienced with public transit. However, in order to learn

from the experiences of those who have used public transit, these individuals were also incorporated into the sample selection.

Screening Criteria

When recruiting respondents to participate in the triad discussions, the objective was to involve a broad cross-section of individuals as this allows for more diverse input. Therefore, individuals who represent a mix of demographic groups such as gender, age (21-74), education levels, and income were recruited. Demographic characteristics of triad respondents are illustrated in the table below. Figures may not add to the overall group size due to participants' unwillingness to provide personal information.

Table 3

	Toronto	Kitchener	Montreal	Sher- brooke	Vancouver	Victoria
Male	4	1	5	2	4	2
Female	3	2	3	2	4	3
AGE						
18-24	2	0	1	0	1	0
25-39	1	2	1	3	2	2
40-54	3	1	3	1	3	3
55-64	1	0	3	0	2	0
65-75	0	0	0	0	0	0
EDUCATION						
High School or Less	0	1	0	0	0	0
High School Graduate	0	0	3	0	2	0
Some College	2	0	0	0	4	2
College Graduate	5	2	5	4	1	3
Post Graduate Degree	0	0	0	0	1	0
INCOME						
\$44K or less	2	0	1	1	3	1
\$44K-\$59K	1	1	2	1	2	2
\$59K-\$82K	3	2	3	1	3	1
\$82K-\$112K	0	0	0	1	0	0
\$112K+	1	0	0	0	0	1
Riders	4	0	4	0	5	0
Non-Riders	3	3	4	4	3	5

In addition, potential respondents were also screened on their general favourability toward public transportation. It is known that a certain segment of the population is negatively pre-disposed toward public transportation, and it is not valuable to include these individuals in the triad discussions. As is standard industry procedure, potential respondents were also screened on past discussion group participation to ensure that "professional" respondents were not recruited. A

security screen was used to exclude individuals in market research and transportation. A copy of the recruiting screener can be found in Appendix C.

Discussion Guide Contents

The triad moderator's guide was designed as outlined below. The discussion guide can be found in Appendix D. Unless otherwise noted, this guide was identical to that which was used in the United States. Note: in order to be consistent with the United States, "public transportation" was the terminology used in the qualitative discussion guide.

- **Introduction:** This section introduces the topic, familiarizes respondents with the process and ground rules, and includes moderator and respondent introductions.
- **Background/Context -- Commuting/Travel Choices:** This section is designed to ease respondents into the discussion by having them talk about their personal transportation choices as well as transportation challenges facing their area/region. This discussion "sets the stage" for the balance of the discussion.
- **General Impressions of Public Transportation:** Objectives of this section are to elicit participants' general perceptions, images, and feelings toward public transportation, as well as learn about the terminology they use to describe public transportation. The preferred terminology was then employed for the duration of the interview. This section also includes a question on the personality characteristics and traits of public transportation: questions of this type provide respondents with the opportunity to think more creatively about the topic at hand and will provide a richer description of their current image of public transportation.
- **Community and Personal Relevance of Public Transportation:** In this section, one begins to understand both the rational and emotional elements that comprise one's perceptions of public transportation. As there are both societal and personal reasons that can potentially cause one to support public transportation, this section of the discussion was structured to encompass both.

This section includes both positive and negative ladders for the relevance of public transportation to the region/area in which respondents' live as well as to each respondent, personally. The ultimate purpose of these laddering exercises is to understand all the reasons why strong public transit systems are important. A hypothetical question and answer sequence follows:

Moderator: You say that "better air quality" is one of the reasons why it is important to you that this region has a strong public transit system. What is the benefit of "better air quality" to the region?

Respondent: If we have better air quality in this area, people are better able to breathe and don't get sick as often.

Moderator: And why is it important that "people are better able to breathe and don't get sick as often?"

Respondent: If people don't get sick from air pollution, they'll be more likely to stay in the area rather than move away. People who stay in the area for a long time form the basis of strong communities.

- **Message Elements Importance vs. Performance:** Section objectives are to understand the importance of individual message elements both to the community and individual. In order to collect the information necessary for an analysis of the equities and disequities of public transportation, a community's ability to provide these benefits is evaluated both within a context of a community that has a strong public transportation system as well as one that does not.
- **Close:** At the conclusion of the group, participants were asked to describe the ideal personality of public transportation. In an effort to understand the extent to which favorability toward transportation is a personal issue or for the greater good, participants were asked to describe their reasoning.

A combination of individual paper and pencil exercises and discussion allowed moderators to gather the individual information necessary to build the consumer decision-making maps but also to take advantage of the discussion to add richness to the maps. Two hours per group were required.

All triad discussions were conducted at local field facilities in each of the geographic areas. A native French-speaking moderator conducted the discussions in Montreal and Sherbrooke.

Quantitative Research: Telephone Survey

Methodology Selected and Rationale

The purpose of the quantitative phase was to assess the effectiveness and impact of messages on improving the visibility and image of public transit among key target audiences. As the objective of this research effort is to develop a communications strategy targeted to a national Canadian audience, the survey methodology must support this outcome. A quantitative telephone survey was not only the most time-efficient option, but also allowed the research team to capture and control the geographic and demographic variables of interest.

All 607 respondents interviewed in this study were members of a randomly selected nationwide sample of Canadian adults, 18 years of age and older. Both riders and non-riders were included in the sample. Survey responses were gathered between May 23 and 28, 2000. All interviews, including those conducted in French, were conducted by a Canadian research facility, under subcontract to the research team.

Sample Design

Consistent with the research design employed in the United States, interviews were only conducted in geographic areas with an existing public transit system. In addition, only eligible transit systems

were included in the sample. An eligible transit system is defined as one that offers any one or a combination of bus, commuter rail, light rail, and heavy rail services. Systems offering other public transit options exclusively (demand response, vanpools, etc.) did not qualify. Transit system size was based on Canadian Urban Transit Association definitions: 1-74 vehicles is defined as a Small system and 75 or more vehicles is defined as a Large system. Geographic areas that served as the basis for sample selection were based upon transit system information contained in the 1999-2000 CUTA Membership Directory and the Canadian Transit Fact Book.

Sample Selection

Two assumptions were made when determining the geographic boundaries from which potential survey respondents were drawn: First, given the small number of vehicles in Small systems, these systems primarily serve the city proper. Second, given the larger number of vehicles in Medium and Large systems, it is believed that these systems primarily serve both the city proper and the outlying areas.

As a result, geographic areas with Small systems were primarily sampled according to city name and postal codes included in each city's defined area. Geographic areas with Large systems were primary sampled according to census divisions and subdivisions.

Within each geographic area, telephone numbers of potential survey respondents were randomly selected. Note: simply because a telephone number was selected did not mean that an individual residing at that number completed the interview. Quotas were not set for each transit system within the region, rather, numbers were dialed evenly through the randomized sample.

Sample Stratification

Within each of the four English-speaking regions (Atlantic, British Columbia, Prairies/Northern region, and Ontario), 100 interviews were completed. Two hundred (200) interviews were conducted in Quebec, for a total of 600 interviews nationwide. The cities included in each region are noted in Table 4, below. Please note that small and large systems are shown separately.

Table 4

ATLANTIC (includes New Brunswick, Newfoundland, Nova Scotia)
Atlantic Small Transit Systems
Cape Breton
Corner Brook
Fredericton
Saint John
St. John's
Atlantic Large Transit Systems
Halifax

BRITISH COLUMBIA
British Columbia Small Transit Systems: NONE ⁷
British Columbia Large Transit Systems
Vancouver Area
Victoria Area

⁷ While BC Transit is categorized as a large system (due to its responsibility for the Victoria operation), it also provides a broad range of transit services in smaller communities throughout the province of British Columbia.

PRAIRIES/NORTHERN (includes Yukon, NW Territories, Alberta, Saskatchewan, Manitoba)

Prairies/Northern Small Transit Systems

Brandon
Grand Prairie
Lethbridge
Medicine Hat
Moose Jaw
Red Deer
St. Albert
Strathcona County
Yellowknife
Whitehorse

Prairies/Northern Large Transit Systems

Calgary
Edmonton
Regina
Saskatoon
Winnipeg

ONTARIO

Ontario Small Transit Systems

Ajax
Barrie
Belleville
Brampton
Brantford
Burlington
Cambridge
Cornwall
Guelph
Kingston
Markham
Newmarket
Niagara Falls
North Bay
Oakville
Oshawa
Peterborough
Pickering
Richmond Hill
St. Catharines
Sarnia
Saulte Ste Marie
Stratford
Sudbury
Thunder Bay
Timmins
Vaughan
Welland
Whitby

Ontario Large Transit Systems

Hamilton
Kitchener-Waterloo
London
Mississauga
Ottawa
Toronto
Windsor

QUEBEC

Quebec Small Transit Systems NONE
 Sherbrooke

Quebec Large Transit Systems

 Laval
 Montreal
 Montreal South Shore
 Quebec City
 Outaouais

It is important to note that, although each of the specific cities was included in the sampling specifications (e.g. was eligible for inclusion), as telephone numbers were selected for the entire region – not a specific city – interviews may not have been completed within a particular location (quotas were not set for each city but for every region). Even dialing of the sample was utilized to minimize the occurrence of this situation.

One-hundred interviews were conducted in each of the Atlantic, British Columbia, Ontario, and Prairies/Northern regions and 200 interviews were completed in Quebec. Margins of error for regional analysis are between ± 9.8 (regional sample sizes of 100) and ± 6.9 (regional sample size of 200) at a 95% confidence level, and ± 4.0 (total sample of 600) at a 95% confidence interval nationwide.

Approximately 15% of all interviews were independently validated for procedure and content. Completed interviews were edited and coded at the research team's Orem, Utah field facility. Statistical analysis and cross-tabulations were produced by the team's own software and computer system.

Screening Criteria

Selecting and interviewing the correct individual is one of the most important steps in the interviewing process. Given that the project objectives were to increase visibility and image of public transit among the general public, there was a need to understand the attitudes and opinions of the population overall. As a result, a nationally representative sample of Canadians (limited to the eligible public transit agencies) was surveyed. Furthermore, the sample sizes described above allowed sufficient representation of key demographic groups on a national level.

All interviews were conducted with adults aged 18 and over. A random selection procedure (for each respondent) was used on a household-by-household basis. Target quotas were set for key demographic variables (i.e., gender and ethnicity) to ensure adequate representation of these groups in the final sample.

Both riders and non-riders were included in the sample. The proportion of riders was monitored to ensure that this group was not proportionally too large. Thirteen percent (13%) of all respondents stated that they had used the public transportation services within their community 13 days or more within the last month.

The demographic profile – in total and by region – of respondents completing the telephone survey is shown below. Responses for individuals who were unwilling to answer a particular question are not shown, therefore columns may not add to 100%.

Table 5

	TOTAL	Atlantic	British Co- lumbia	Prairies/ Northern Region	Ontario	Quebec
GENDER						
Male	37%	38%	41%	38%	36%	41%
Female	63%	62%	59%	62%	64%	59%
EDUCATION						
High School or Less	14%	23%	9%	16%	13%	9%
High School Graduate	27%	21%	25%	31%	27%	28%
Some College	22%	25%	27%	21%	23%	12%
College Graduate	30%	22%	29%	23%	32%	43%
Some Graduate School	2%	5%	3%	3%	-	2%
Post-Graduate Degree	5%	5%	7%	5%	5%	5%
AGE						
18-24	9%	15%	9%	12%	7%	8%
25-29	9%	7%	16%	6%	10%	12%
30-34	10%	4%	12%	9%	11%	10%
35-39	13%	15%	7%	21%	10%	11%
40-44	13%	11%	13%	13%	14%	14%
45-49	11%	10%	9%	10%	13%	9%
50-54	9%	10%	10%	9%	8%	10%
55-59	8%	7%	10%	6%	10%	6%
60-64	5%	4%	5%	2%	6%	9%
65-74	6%	8%	5%	6%	5%	7%
75+	6%	6%	4%	6%	6%	2%
INCOME						
Under \$20K	14%	14%	7%	14%	15%	16%
\$20K-\$35K	16%	19%	27%	14%	15%	25%
\$35K-\$50K	19%	27%	16%	18%	19%	21%
\$50K-\$70K	12%	12%	17%	16%	10%	18%
\$70K+	21%	15%	16%	16%	26%	10%
EMPLOYMENT						
Full-time	52%	50%	42%	52%	52%	54%
Part-time	12%	14%	18%	14%	10%	12%
Student	4%	6%	8%	4%	4%	4%
Retired	19%	21%	15%	14%	21%	17%
Homemaker	8%	7%	8%	7%	9%	7%
Self employed	1%	2%	5%	3%		2%
Unemployed	2%			2%	2%	
Disabled	2%	1%	1%	2%	2%	
VOTERS						
Yes	97%	100%	92%	97%	96%	97%

	TOTAL	Atlantic	British Co- lumbia	Prairies/ Northern Region	Ontario	Quebec
INFLUENTIALS						
Yes	16%	23%	12%	9%	21%	13%
AGE						
18-24	9%	15%	9%	12%	7%	8%
25-29	9%	7%	16%	6%	10%	12%
30-34	10%	4%	12%	9%	11%	10%
35-39	13%	15%	7%	21%	10%	11%
40-44	13%	11%	13%	13%	14%	14%
45-49	11%	10%	9%	10%	13%	9%
50-54	9%	10%	10%	9%	8%	10%
55-59	8%	7%	10%	6%	10%	6%
60-64	5%	4%	5%	2%	6%	9%
65-74	6%	8%	5%	6%	5%	7%
75+	6%	6%	4%	6%	6%	2%

Questionnaire Contents

The questionnaire used during the quantitative phase of research was designed to support the development of a strategic positioning to improve the image of public transit and create an environment of support for public transit initiatives among the general public around the country.

The flow of the questionnaire mirrors that of the triad discussion and is as follows (Questionnaire can be found in Appendix E). Note: to be consistent with the United States, “public transportation” was the terminology used throughout the questionnaire.

- **Background/Context:** The section objective was to better understand the importance and relevance of public transportation issues vs. other leading community concerns. Note: health care was unique to the Canadian instrument.
- **Transportation Choices:** Section goals were to understand respondents’ current mode of transportation as well as to understand respondents’ attitude toward public transportation vs. other modes of transportation.
- **Impressions/Awareness of Public Transportation:** These questions were designed to elicit feelings and images of public transportation, as well as to understand the overall awareness of public transportation’s offerings in the community/region where the respondent lives.
- **Public Transportation Usage:** These questions provided a quick read of respondents’ current use of public transportation services.

- **Perceived Benefits of Public Transportation:** This section was designed to understand the importance, on both a personal and community/area level, of perceived benefits of public transportation. In order to validate the equities and disequities of public transportation, a region's ability to provide these benefits is evaluated both in the context of having a strong public transportation system and not having a strong public transportation system.
- **Demographics:** These questions allowed the team to gather respondent-specific information to allow cross-tabulation analysis, segmentation, and target audience identification.

7 DETAILED FINDINGS

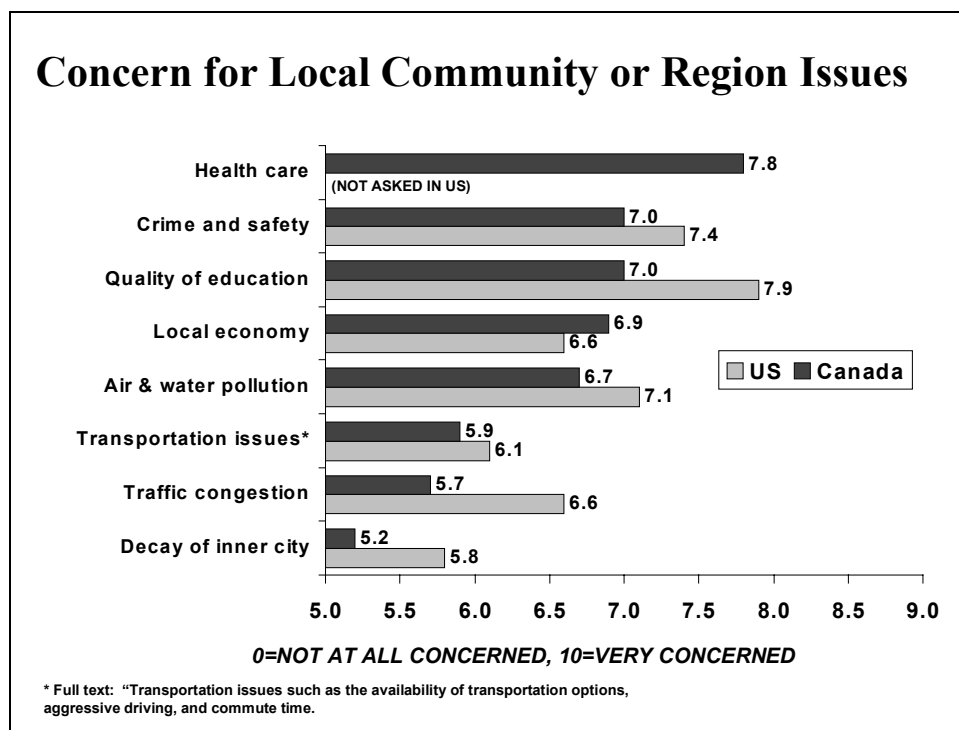
Relevant research results from both the triad discussions and the telephone survey are described on the following pages. Note: although research indicates that “public transit” is the preferred terminology in Canada, “public transportation” has been used here in order to maintain the integrity of the question wording and references used.

Importance Of Transportation Issues And Public Transportation To Community

Concern Regarding Issues Facing Local Community

The Canadian public does not place transportation issues high on the public agenda. Other more burning issues like *health care* (7.8 on a 1-10 scale), *crime and safety* (7.0), *quality of education* (7.0), *local economy* (6.9), and *air and water pollution* (6.7) significantly overshadow *transportation issues* (5.9). This finding is similar to that of the United States where *quality of education*, *crime and safety*, and *air and water pollution* are of greater concern than transportation issues. [Figure 1]

Figure 1



It is important to note that although in the United States most people are more concerned about *traffic congestion* (6.6) than *transportation issues* (6.1), in Canada most people are equally concerned about *traffic congestion* (5.7) and *transportation issues* (5.9). Residents of British Columbia and Quebec express the greatest concern about transportation issues and traffic congestion. [Figure 2]

Figure 2

Concern for Local Community or Region Issues						
BY REGION						
	<u>Total</u>	<u>Atlan.</u>	<u>BC</u>	<u>P/N</u>	<u>Ontario</u>	<u>Quebec</u>
Health care	7.8	8.3	7.6	7.8	7.4	7.9
Crime and safety	7.0	6.6	7.5	6.7	6.5	7.5
Quality of education	7.0	7.2	6.8	6.3	6.5	7.5
Local economy	6.9	7.7	6.8	6.2	6.6	7.1
Air & water pollution	6.7	6.2	6.7	5.7	7.1	7.1
Transportation issues	5.9	5.0	6.8	4.8	5.6	6.5
Traffic congestion	5.7	4.7	7.3	5.3	5.3	5.7
Decay of inner city	5.2	4.5	5.4	5.0	5.6	5.4

May 23-28, 2000
Ttl=600, A=100, BC=100, P/N=100, Ontario=100, Quebec=200

Canadians who reside in areas with Large public transit systems exhibit more concern for transportation issues (6.4) and traffic congestion (6.2) than do those who reside in areas with Small systems (5.0 and 4.8, respectively).

Public transportation users, single parents, students, car-poolers, and those who take the bus express the greatest concern over *transportation issues*.

Favourability Toward Various Forms of Transportation

People lack positive feelings toward public transportation in general as well as towards specific modes of transportation. Everyone loves driving his or her own car (7.8 on a 1-10 scale), but feel lukewarm toward public transportation (6.7), taking the bus (6.3) and rail (4.4). Findings in the United States are similar in that public transportation (5.6) is more positively perceived than the specific modes of transportation such as bus (5.0) or rail (4.6).

Not surprisingly, those who have used public transportation 7 times or more in the past month feel much more favourable toward transit (8.3) than toward driving a private car (6.4). In addition, the strongest supporters of public transit tend to be people living in Quebec (7.3), those who are 18-24 years old (7.8), lower income (7.4 among those with income below \$20,000), and single parents (7.5).

With regards to public transportation, familiarity clearly breeds greater favourability: people most familiar with public transportation rate it the highest (7.5) and people least familiar rate it lowest (6.4).

Clearly, as in the United States making everyone more familiar with public transportation will increase positive feelings and support for public transportation. By itself, however, increased familiarity may not be enough to elevate the image of public transportation to the level ultimately desired over the long run.

It is also important to note that public transportation (6.7) is clearly more positively perceived than the more specific modes of public transportation such as bus (6.3) or rail (4.4). Similarly, with respect to preferred terminology, qualitative research revealed that “public transit” is more positively interpreted than “mass transit,” “public transportation,” or “mass transportation.”⁸

Transportation Challenges and Importance

Triad respondents described the greatest transportation challenges currently facing their communities. Top concerns among respondents in Canada include *traffic congestion*, *pollution*, *poor road conditions*, and *safety*. In the United States top concerns also included *road rage/aggressive driving* and *lack of public transportation*.

⁸ Although “public transit” is the most positive terminology in Canada, for consistency with the United States, “public transportation” was the terminology utilized throughout the questionnaire. In both countries, the types of vehicles included as “public transportation” were defined for the respondent.

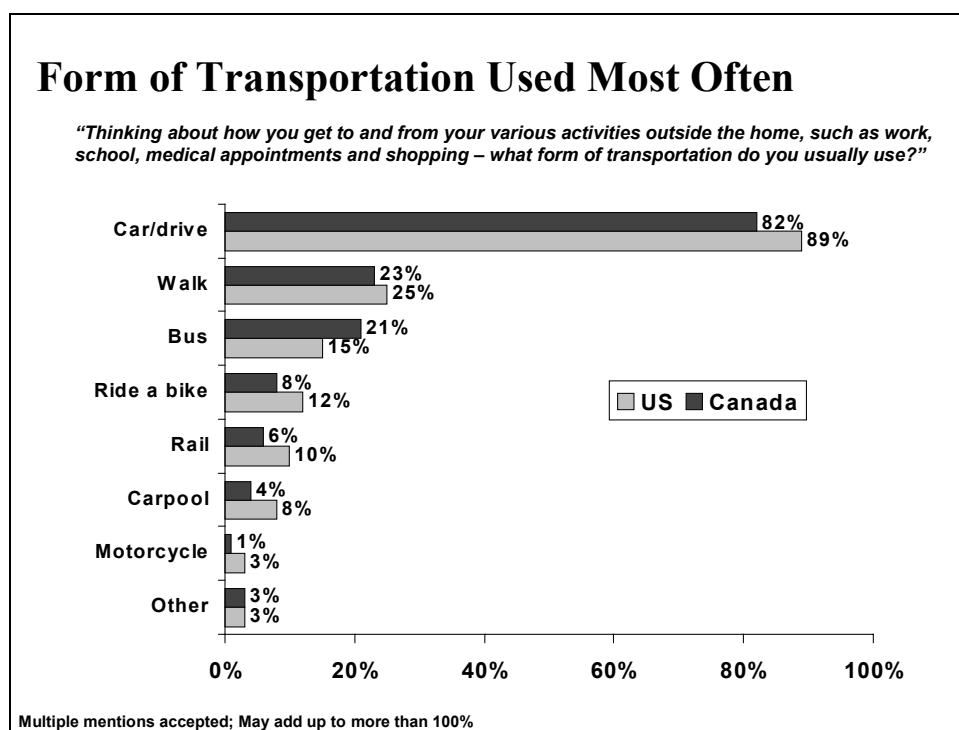
There are slight differences in what was emphasized in each region⁹:

- Toronto: *Congestion, delays, construction, pollution, price of gasoline*
- Kitchener: *Narrow roads, not bicycle friendly, congestion, price of gasoline*
- Montreal: *Bicycle paths take up too much road space, not enough car-pooling, too many “one-ways” and “no left turns,” buses slow down traffic*
- Sherbrooke: *Inaccessibility of public transportation, poor road conditions, pollution, safety*

Transportation Choices

Given the previous results, it comes as no surprise that the form of transportation used most often by those surveyed is their own car (82%). Other transportation choices are much lower on the list. The pattern of usage is similar in both the United States and Canada. [Figure 3]

Figure 3



Differences by geographic region are:

- Driving a car is more likely for Ontario (86%), Prairies/Northern region (84%), and Atlantic (83%) residents.

⁹ Due to the flow of the discussion, these questions were not asked in Vancouver and Victoria.

- Those in the British Columbia and Quebec walk (27%, 37%) take the bus (25%, 34%) use rail (7%, 14%) and ride a bike (9%, 12%) more often than others.
- Car-pooling, taxis, motorcycles, and other forms of transportation are generally not very popular in any of the regions.

Subgroup analysis reveals the following trends among bus and rail users:

- Bus use is highest among the Unemployed (26%), Students (55%), 18-24 year olds (37%), those in households making <\$20K (40%), single parent (31%), singles without children (29%), and urban dwellers (29%).
- It is interesting to note that in Canada 55% of students use the bus, whereas in the United States only 35% of students use the bus.

Awareness And Impressions Of Public Transportation

Availability Of Public Transportation

Although all respondents live within the boundaries of a public transit system, only 88% of all respondents (with only 52% saying readily available and 37% saying somewhat available) perceive that public transportation is available in their community/region. The trends are similar in the United States, with US residents less likely to find public transportation available. [Figures 4, 5, 6]

Figure 4

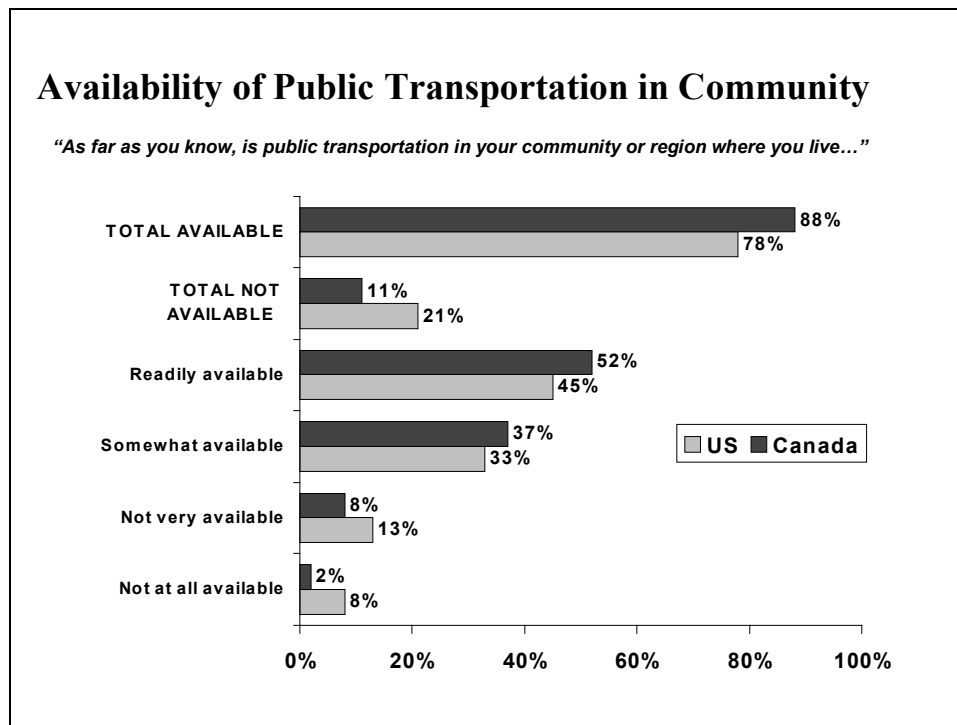


Figure 5

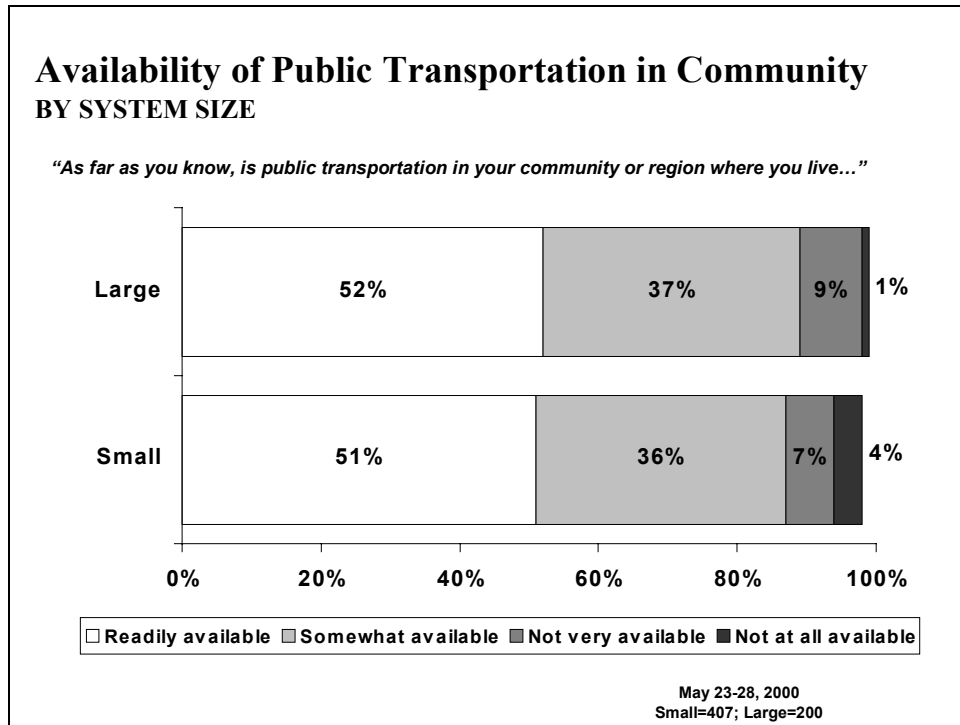
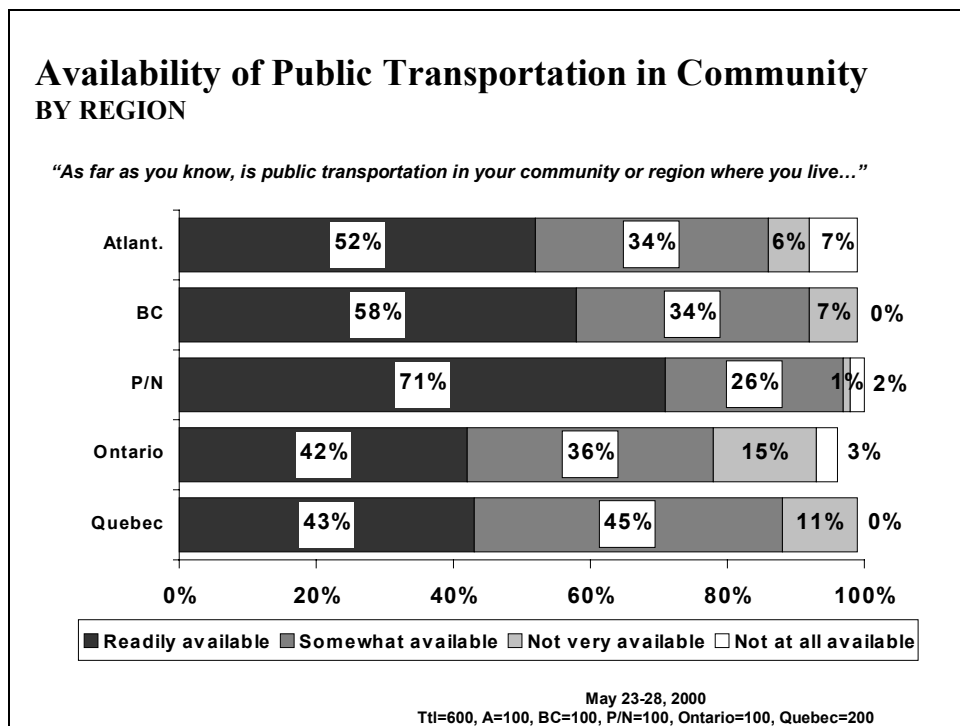


Figure 6



Once again we see important variations by size of system and region:

- Those in Large (52%) and Small (51%) systems are equally likely to say public transportation is *readily available*.
- Those in the Prairies/Northern region (71%) and British Columbia (58%) are more likely to say public transportation is *readily available*.
- Those in Quebec (45%), and Ontario (34%) are more likely than the aggregate to say public transportation is *somewhat available* in their area.
- Atlantic (7%) respondents are more likely than the full sample (3%) to say public transportation is *not at all available* to them.

Use Of Public Transportation

Eight-in-ten (80%) of those surveyed have used the public transportation system within their community or region, whereas in the United States only two-thirds (64%) have used public transportation. [Figures 7, 8, 9]

Figure 7

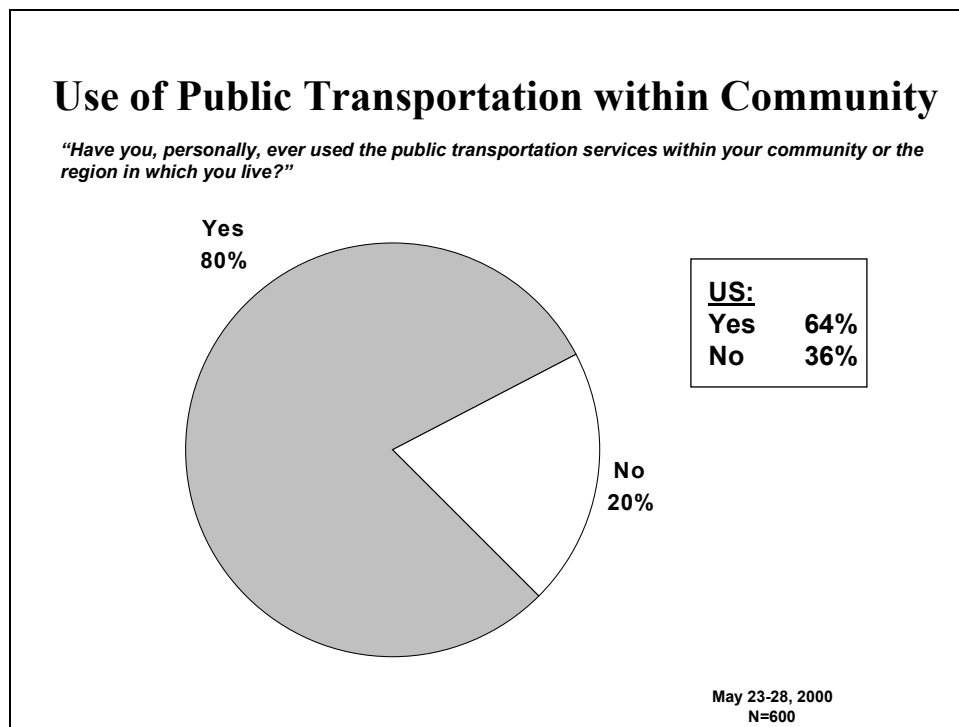


Figure 8

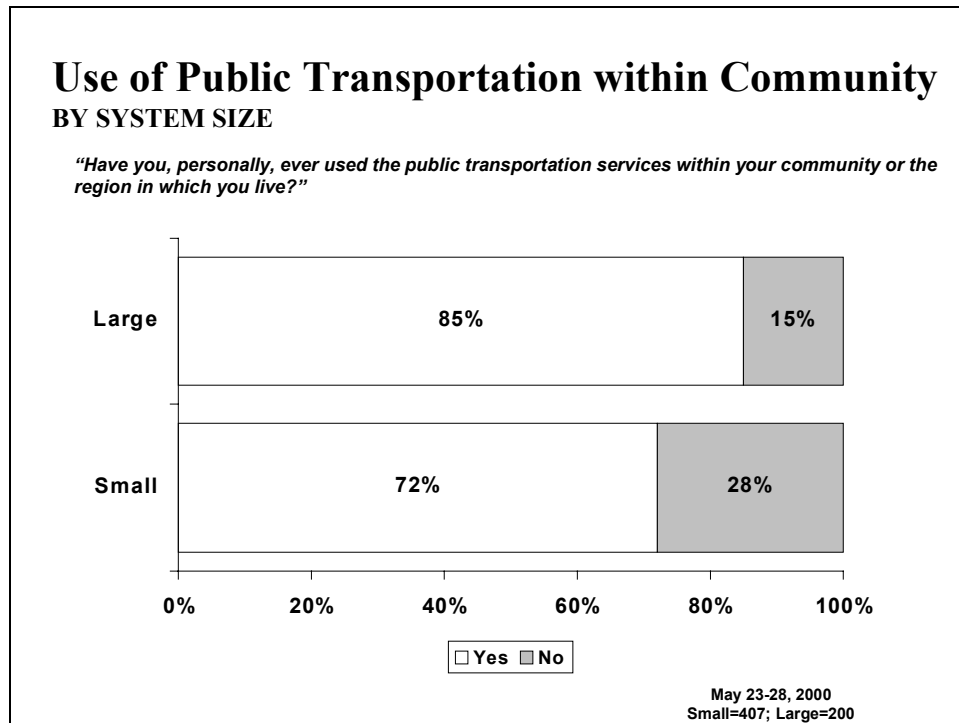
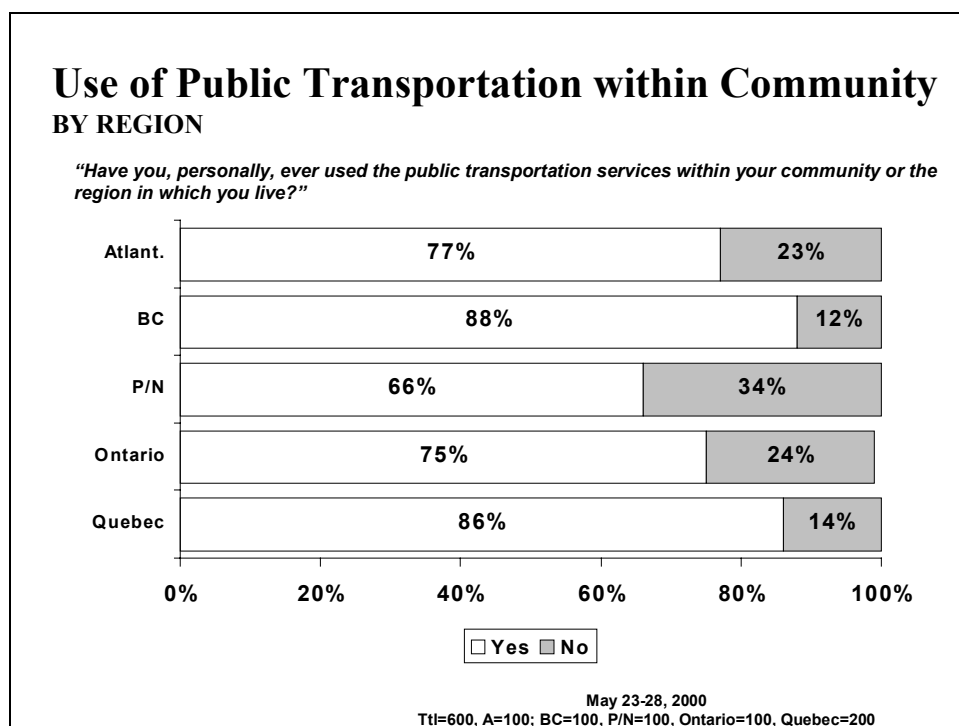


Figure 9



This figure is higher among the following key groups:

- Influentials (85%)¹⁰
- Those in Large systems (85%)
- British Columbia (88%), and Quebec (86%) residents

The following subgroups are more likely than other groups to have ever used public transportation in their area. Note: some of these demographic groups are regular and current users of public transportation. As this question refers to “ever” using public transportation, the demographic groups differ.

- | | |
|---|------|
| • Student | 100% |
| • 18-24 | 95% |
| • Those who support public transportation (8-10 rating on 1-10 scale) | 89% |
| • Some College Education | 88% |
| • College Graduate | 86% |
| • Female 18-34 | 85% |
| • \$50K-\$70K | 84% |
| • \$20-35K | 84% |
| • Urban | 84% |
| • Single Parents | 83% |
| • Suburban | 82% |

¹⁰ An Influential is defined as someone who says he/she has engaged in four of the following activities within the past 12 months: regularly reads the editorial page, written or telephoned radio or television station to express opinion, taken active part in some local issue, written to the editor of a magazine or newspaper, worked for a political party or candidate, spoken at a public meeting, written or visited a public official about some matter of public business, or written or said something that has been published. One-in-seven (14%) Canadians fit this definition.

Use Of Public Transportation In The Past Month

Those who have used public transportation in their area were asked how often they used it in the past month. Nearly half (48%) have not used public transportation at all in the past month. Among the remaining 52%, most have used public transportation fewer than six (6) times in the past month. Findings are similar to the United States.

[Figures 10, 11, 12]

Figure 10

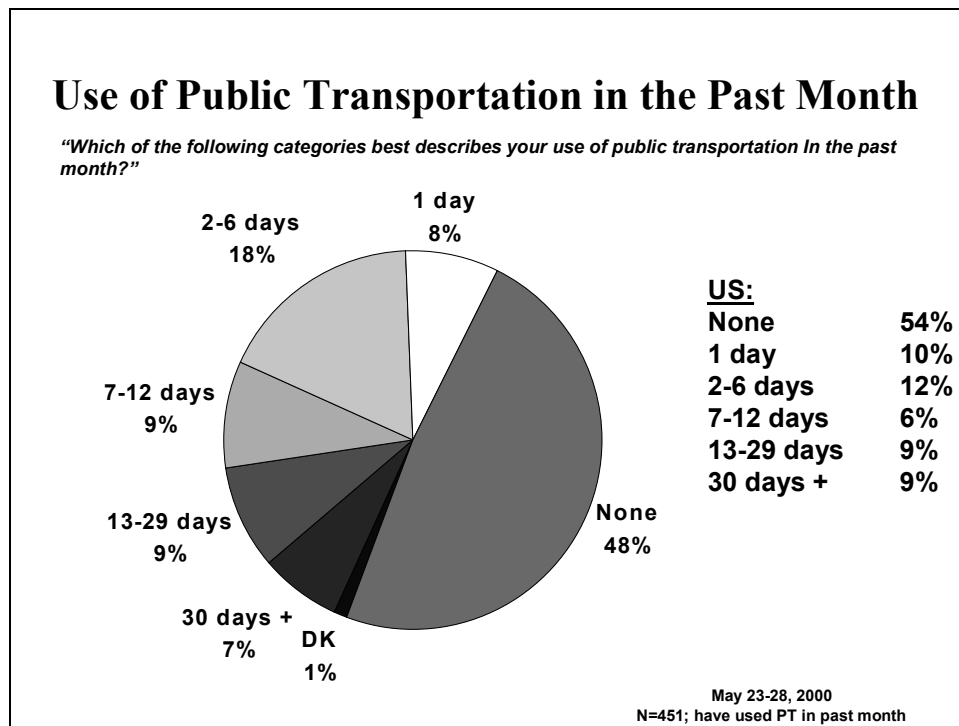


Figure 11

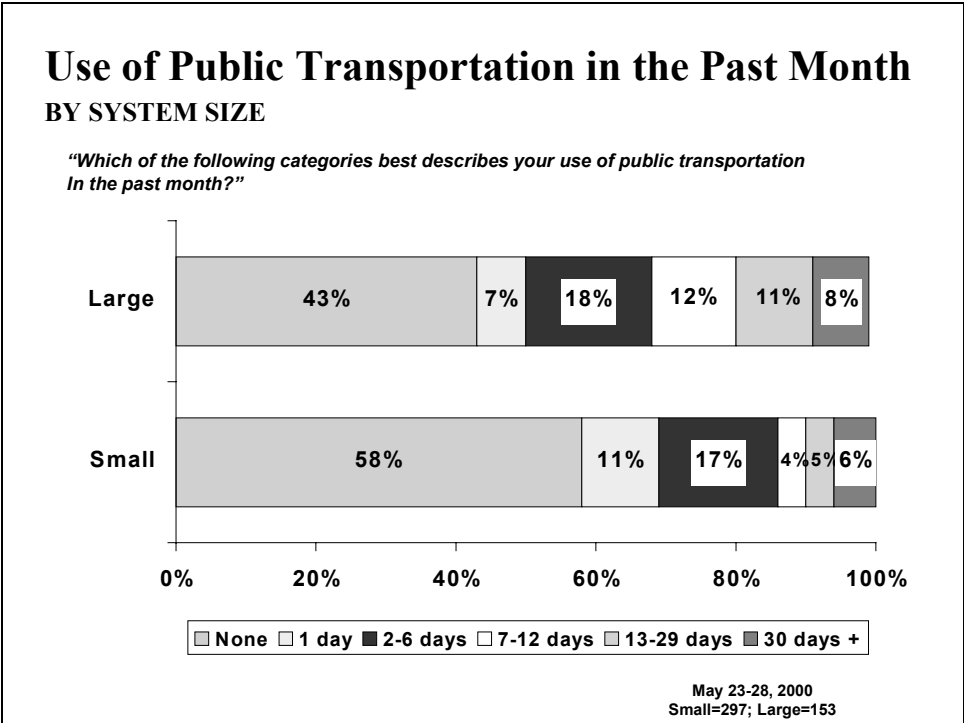
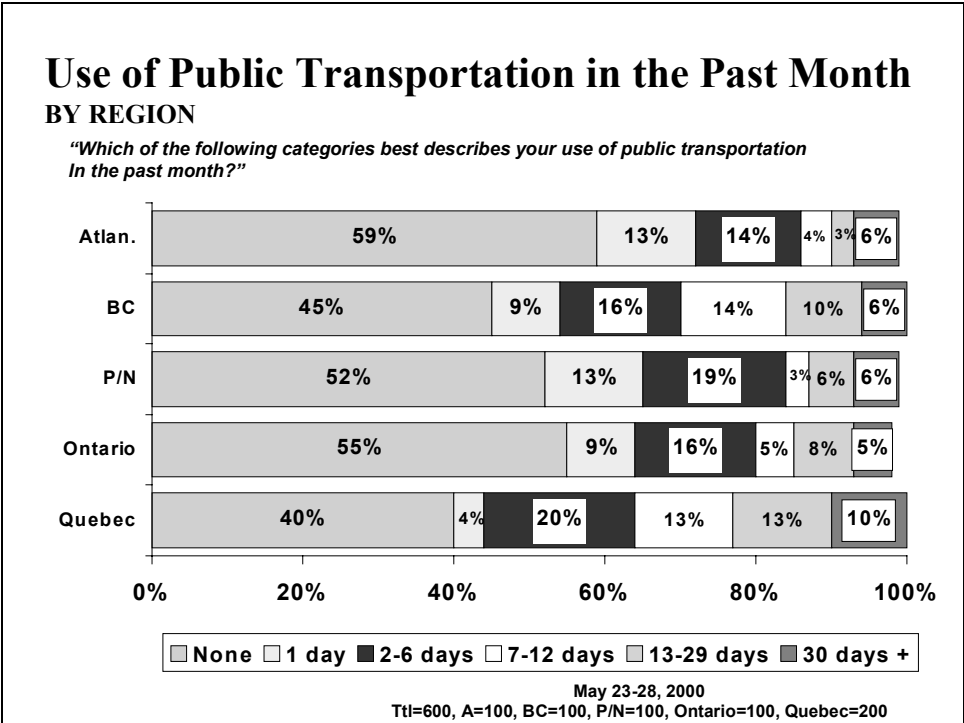


Figure 12



Those in Small (58%) systems are more likely than the aggregate to have *not* used public transportation in the past month whereas residents in areas with Large systems are more likely to have used it. This is also the case among Atlantic (59%), and Ontario (55%) respondents.

Familiarity With Public Transportation

Although 88% say public transportation is available in their area and 80% have used it at least once, just slightly less than two-thirds (63%) say they are familiar with the specifics of public transportation services (25% very and 39% somewhat). Just less than one-third (36%) say they are not familiar, with nearly one-in-five (18%) saying they know nothing about the public transportation services in their area. The same general patterns exist in the United States but residents are less likely to be familiar with public transportation in the area. [Figures 13, 14, 15]

Figure 13

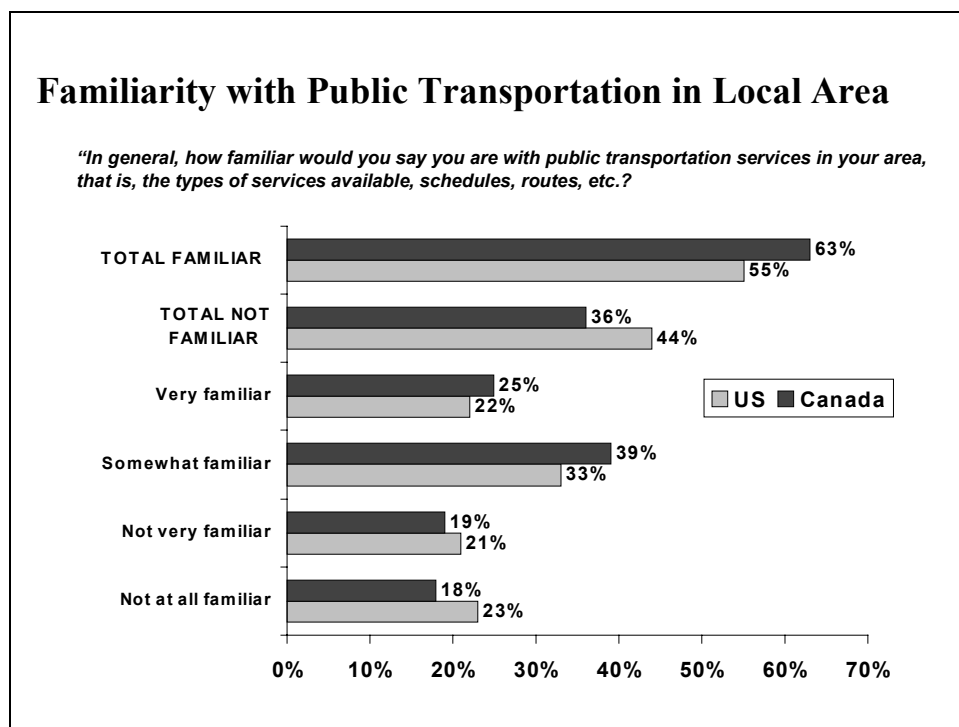


Figure 14

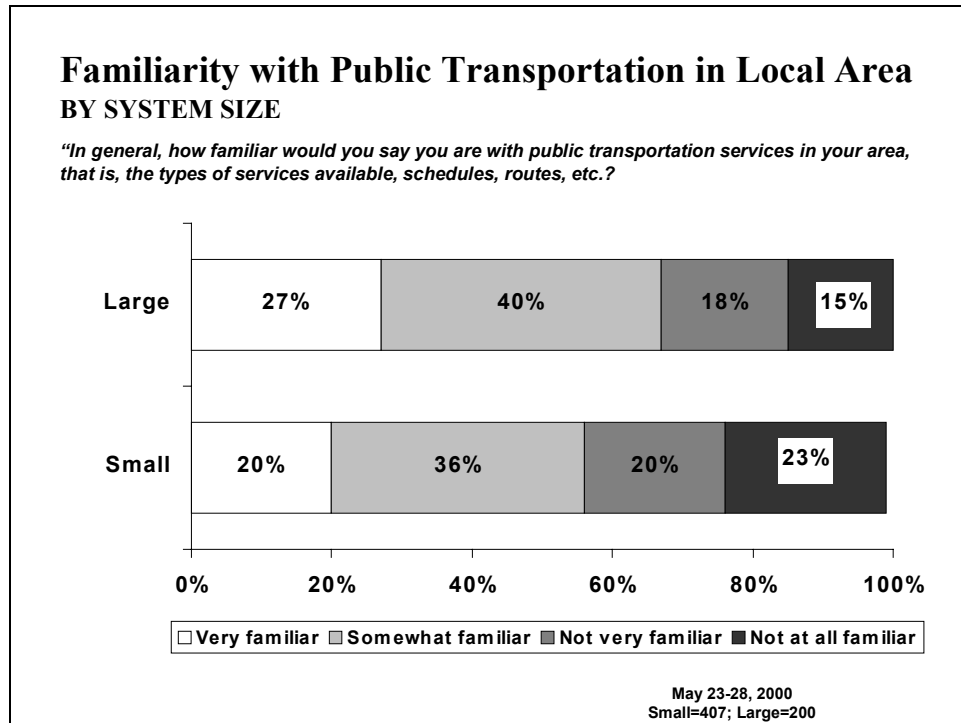
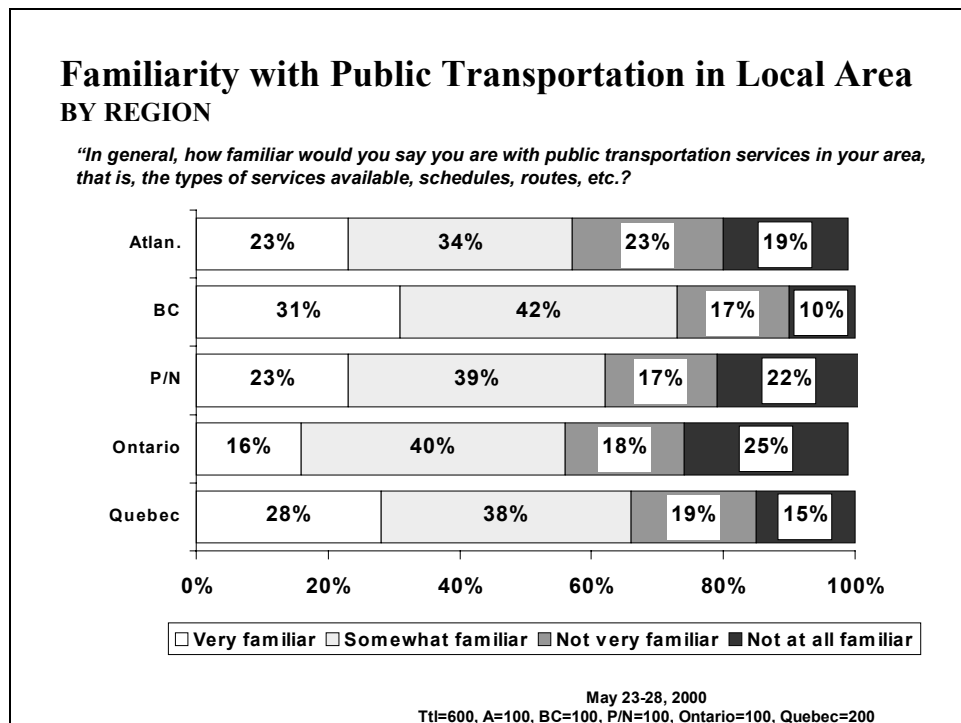


Figure 15



This lack of familiarity accounts for a large part of the lukewarm feelings toward public transportation.

Significant differences by size of system and region are as follows:

- As would be expected, residents of Large systems are more likely to say they are *very familiar* with the public transportation in their area (27%). This is also true among British Columbia residents (31%).
- Those in Small systems are more likely to say they are *not familiar at all* (23%). This is similar between Ontario (25%), and Prairies/Northern region (22%) respondents.

Terminology Used To Describe Transportation

Triad participants named the types of services people use to get around other than a personal car. In Canada *bus*, *transport en commun*, *public transportation*, and *transit* receive the most responses overall.

Other responses given are *public* and *subway*. In the United States, participants mention a wider variety of terms to describe *transportation*, such as *buses*, *bicycles*, *taxi-cabs*, *trains*, *walking*, *rollerblades*, *trolleys*, and *airplanes*—*buses* being mentioned the most often.

The qualitative research explored public reaction to different words: “public,” “mass,” “transit,” and “transportation.” In general, the English speaking groups of Toronto, Kitchener, Vancouver, and Victoria view “public,” “transportation,” and “transit” as relatively positive while “mass” is viewed negatively. “Public” conjures up images of something that is for everybody and that anyone can use. “Mass,” however, makes people think *of huge numbers of people crowded together*. “Transit” is viewed as *something modern and efficient, and large in scale*. “Transportation” is viewed as *encompassing any means of getting around*.

In the French speaking groups of Montreal and Sherbrooke, “Public” is viewed negatively as *inefficient(inefficace)* and *cold (froid)*. “Mass” refers to *small groups getting together (petits groupes qui se ressemblent)* and “Transit” appears to be more *friendly (amical)* as it is the term actually used and that with which people are familiar.

All things considered, “public transit” is the preferred terminology in Canada.

The following table outlines selected quotes from each group:

Table 6

	Toronto	Kitchener	Montreal	Sherbrooke	Vancouver	Victoria
Public	-Positive -Everyone welcome	-Not private	-Sounds European, cold -For poor people of various ethnicities	-Free for everyone -Not efficient	-Available to everyone -Managed by city, higher taxes	-No restrictions -All can use it
Mass	-Sounds American, negative -Brainless throng	-Swarms of people -overcrowded	-More appropriate for car-pooling -Refers to people getting together	-Small homogenous group getting together	-Herd of cattle -Large, huge, chaotic	-Big city, urban -Lots of people crammed in small space
Transit	-Efficient -Get there quickly	-Shorter, easier to say -More affordable	-Friendly expression, the one used	-Neutral image -current system	-Constant movement	-To and fro, moving along routes
Transportation	-More official -Includes cars, bikes, planes, everything	-Longer distance travel	-No comment	-No comment	-All modes, anything that moves you	-Convenience -Mostly cars

Top-Of-Mind Impressions of Public Transportation

Likes

Residents in Canada like public transportation because it is *good for the environment* (17%), *convenient* (14%), *quick* (11%), *inexpensive* (10%), and *available* (9%). Positive associations with transit are similar to those in the United States. US citizens also mentioned that they like public transportation because it *reduces congestion* (9%).

There are some differences in opinion by system size and region:

- Those who reside in areas with Large systems are more likely than those who reside in areas with Small systems to say that public transportation is *good for the environment* (18%) and *quick* (17%) whereas those who reside in areas with Small systems are more likely to say public transportation is *convenient* (19%) and *available* (10%).
- *Inexpensive* is mentioned more often by residents in the Prairies/Northern region (22%).
- Those in the Atlantic (22%), Prairies/Northern (20%) and Ontario (20%) regions are more likely than the aggregate to mention *convenience*.
- *Good for the environment* is popular among participants from Quebec (19%), Ontario (18%), and British Columbia (18%).
- *Availability* is a response offered more often by those in the British Columbia (16%) area.

Typical examples of verbatim comments for the top three public transportation “likes” are shown below:

1. Good for Environment – 17%:

- *Because of the cut down of pollution.*
- *It takes cars off the road, it cuts pollution and can take a lot of people at a time.*
- *It saves on the air pollution.*
- *It's readily available and affordable. Environment-friendly.*
- *I like it most because it's environmentally friendly and it reduces traffic. It's just an all around good thing.*

2. Convenient – 14%:

- *You do not have to worry about parking. The freedom to view things, in a bus or whatever you can look around and see things, view the scenery, rather than be responsible for the driving.*
- *It's fairly fast, economical, and it's convenient.*
- *It's dependable. You can easily find buses where you want to go. They are clean, on time, and the drivers are good.*
- *I find the public transportation service very accessible and very easy to use.*

3. Quick (11%):

- *It's fairly fast, economical and convenient.*
- *Our bus system is quite good. They come along quite frequently. I don't take the bus too often but when I do it is pretty good.*
- *It's fast and it gets you there quickly.*

Dislikes

Principal reasons for not liking transit include *time consuming* (25%), *inconvenient schedules* (22%), *crowded* (17%), and *lack of availability/access* (16%). Secondary reasons include *expensive* (8%), *slow* (11%), *crude drivers/passengers* (6%), *inconvenient stops* (6%) and *unsafe* (5%).

Findings are surprisingly similar in the United States with principal reasons including operational characteristics such as *time consuming* (20%), *lack of availability/access* (18%), *inconvenient schedules* (16%), and *crowded* (16%). The secondary reasons are only slightly different: *inconvenient* (10%), *crude drivers/passengers* (8%), *unsafe* (8%), *expensive* (8%), and *dirty buses* (7%).

In the case of public transportation dislikes, we do see differences in both size category and region.

- Residents in Small systems are more likely than most to say public transportation has *inconvenient schedules* (24%), and is *expensive* (14%).
- Those in Large system areas mention *time consuming* (28%), *slow* (13%) and *unsafe* (6%) more than the aggregate.

In terms of region, we see the following answers given more often than by the aggregate:

- Atlantic: *Expensive* (18%)
- British Columbia: *Crowded* (25%), *lack of availability/access* (23%)
- Prairies/Northern: *Lack of availability/access* (23%)
- Ontario: *Inconvenient schedule* (32%), *crude drivers/passengers* (11%), *unsafe* (9%)
- Quebec: *Time consuming* (33%), *slow* (16%)

Examples of verbatim responses are listed below:

1. Time Consuming – 25%:

- *Their waiting times. They don't take you exactly where you want to go. Sometimes you have to walk great distances just to get to a bus stop to go where you want to go.*
- *The public buses take too long. If you want to go somewhere it usually takes about an hour to an hour and a half to get where you want to go.*
- *The waiting time for buses, such long periods of waiting.*
- *They're not frequent. It takes time to show up. They need to make better time.*

2. Inconvenient Schedules – 22%:

- *It's not very available. They don't run on Sundays at all, and when the buses do run they run 45 minutes apart.*
- *Poor timing, a better schedule is needed.*
- *The scheduling, it's hard to get from one place to the other.*
- *It's not 24 hours. I work the night shift and there are no buses running overnight.*

3. Crowded – 17%

- *It's crowded, it's costly, and it's not always available.*
- *Sometimes the buses are crowded and it is poorly ventilated.*
- *I don't like the heavy cologne that some people wear on the bus. It's hard to breathe.*
- *The lack of personal space in buses.*

4. Lack of Availability/Access – 16%:

- *They don't come to my area of where I live.*
- *They don't run frequently. The bus stop is too far from my home.*
- *I haven't needed it. I have a disability, so I don't take it.*
- *The buses don't run out in my area that often. If I miss a bus, then I have to wait another 20 to 30 minutes for the next one, since there is only one bus running*

Personification Of Public Transportation

An exercise designed to “personify” public transportation was conducted among triad participants. Participants were asked to think about their impressions of public transportation in general, and describe this system using human characteristics and qualities.

Descriptions were balanced between positive and negative impressions in each group. The French-speaking groups of Montreal and Sherbrooke had the greatest amount of positive descriptors, and therefore the most favorable impression of public transit.

Toronto

There are two differing descriptions:

- 1) Powerful, businessman, inflexible and authoritative
- 2) Punctual, helpful, reliable, considerate, and safe

Kitchener

The two main ideas here are:

- 1) Impersonal, obsessive-compulsive, and inconsiderate¹¹
- 2) Mature and dependable

Montreal

The strongest theme here is positive with a slight negative mention:

- 1) Child-friendly robot (Robot amical pour enfants)
- 2) Strong, relaxed, and comforting middle-aged man (Homme dans la quarantaine, fort, détendu et rassurant)
- 3) Careless, bossy, and aggressive (Négligent, meneure et agressif)

Sherbrooke

Again, there are two themes, one positive and one negative:

- 1) Respectable, warm and courteous man who is involved in the community and likes to help everyone (Un homme respectable, chaleureux et courtois qui s’implique dans la communauté et aime aider tout le monde)
- 2) Indifferent, unreliable, selfish, and disrespectful (Indifférent, non fiable, égoïste et irrespectueux)

Vancouver and Victoria¹²

No comment

¹¹ “Obsessive-compulsive” and “inconsiderate” refer to the rigidity of the transit system routes.

¹² The flow of the discussion in these locations was such that the moderator was unable to include this section.

In the United States descriptions were mostly negative in all locations. Typical negative remarks described public transportation as *old*, *smelly*, *dirty*, and *unreliable*. Almost all who specified gender said public transportation was *male*.

At the end of each triad discussion session, respondents described public transportation again—this time they were asked to describe a strong public transportation system, again using human characteristics and qualities.

As shown below, responses were much more positive than before, with slightly differing personalities in each group. Sherbrooke was the only group to describe a strong public transportation system as a woman.

Toronto

- 1) Helpful, courteous, personable
- 2) Modern and forward-thinking

Kitchener

- 1) Clean and flexible
- 2) Dynamic and fast

Montreal

- 1) Fast, muscular, entertaining (rapide, musclé, divertissant)
- 2) Reliable, simple and comforting middle-aged man (Homme dans la quarantaine, fiable, simple, et réconfortant)

Sherbrooke

- 1) Respectful, honest and reliable woman (Femme respectable, honnête et fiable)
- 2) Involved in the community (Impliqué dans la communauté)
- 3) Good listener (Qui écoute avec empathie)

Vancouver and Victoria¹³

No comment

¹³ The flow of the discussion in these locations was such that the moderator was unable to include this section.

Priority Of Messages

The most effective messages meet important criteria:

- It must be an important and relevant concern,
- It must be a distinguishing characteristic of transit, and
- It must be linked to strong personal values and emotions.

To prioritize message components, quantitative research first assessed the importance of each component to the respondent and the region where they lived. Second, research assessed the degree to which each component was a strength in a community with public transportation as compared to a community without public transportation. Third, qualitative research identified the means by which each of these potential message components engaged the personal values of non-riders.

Importance of Various Issues to Region

In Canada as in the US, respondents rated twelve different items on importance of the item to them personally as well as to the region in which they live:

- Among Canadians, *spending more time with friends and family* (8.8) and *safer roads, highways and transportation* (8.7) and *having mobility and freedom to do what you most want to do* (8.7) are rated highest on the 1-10 importance scale.
- In second place are *better or improved quality of life* (8.6), *cleaner air* (8.5), *having more time to do the things you want to do* (8.5), and *providing opportunities for every walk of life* (8.4).

The top-rated items are virtually identical to those mentioned in the US. A full list of mean scores for all items tested in Canada is shown below:

Table 7

Item	MEAN
Spending more time with friends and family members or those people you care about the most.	8.8
Making roads, highways, and transportation safer for all drivers and commuters.	8.7
Having mobility and freedom to do what you most want to do.	8.7
A better or improved quality of life.	8.6
Cleaner air.	8.5
Having more time to do the things you want to do.	8.5
Providing opportunities for people from every walk of life.	8.4

Easy access to the things you need in everyday life such as work, shopping and daycare	8.3
Having lots of choices and options available.	8.2
Building community spirit and making your community more livable.	8.0
Economic growth and development in your community.	8.0
Less traffic congestion.	7.2

Impact of Public Transportation on Key Issues: Distinguishing Characteristics of Public Transportation in Canada

After respondents rated the importance of the twelve items, they rated the performance of these same items between two community types: one WITH public transportation and one WITHOUT public transportation. Results show Canadians, consistent with Americans, believe that communities WITH public transportation do better on all twelve of the benefit criteria tested. The following table shows performance mean scores for each item tested in Canada as well as the difference score (community with item minus community without item):

Table 8

	<u>WITHOUT</u> PUBLIC TRANSPORTATION	<u>WITH</u> PUBLIC TRANSPORTATION	DIFFERENCE SCORE
Provides easy access to things its residents need in everyday life, such as work, daycare, and shopping.	4.7	8.2	3.5
Provides opportunities for people from every walk of life.	4.6	8.1	3.5
Provides lots of transportation choices and options.	4.5	7.9	3.4
Provides residents with the mobility and freedom to do what they most want to do.	4.6	7.8	3.3

Has strong economic growth and development.	4.8	7.7	2.9
Dramatically reduced traffic congestion	4.5	7.6	2.9
Builds a sense of community and makes the community more livable.	4.9	7.7	2.8
Ensures that residents have more time to do the things they want to.	4.8	7.6	2.8
Makes roads, highways, and transportation safer for all drivers and commuters.	5.2	7.9	2.7
Its residents have a good quality of life.	5.2	7.9	2.7
Allows one to spend more time with friends and family, or those people they care about the most.	5.2	7.7	2.5
Has a cleaner environment or has less pollution	5.4	7.9	2.5

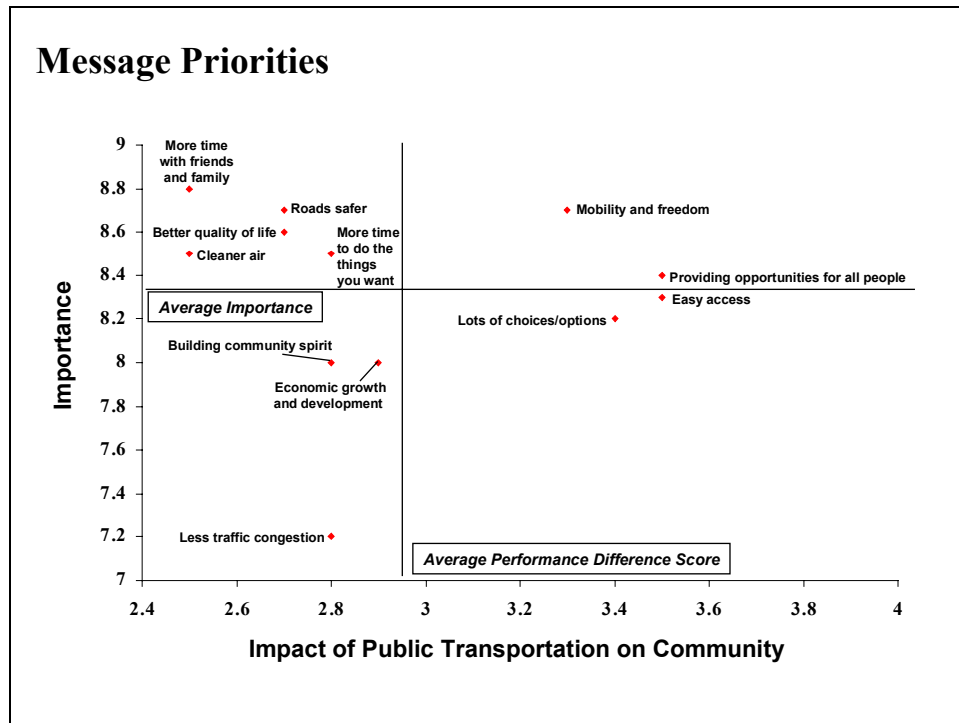
Having easy access to things, having lots of transportation choices and options, providing residents with personal mobility and freedom to do what they want, and providing opportunities for people have the highest difference scores, indicating that these characteristics are most prevalent in communities with strong public transportation systems.

Having lots of choices and options available has the highest difference score in British Columbia (4.3) and urban areas (4.2). Respondents obviously feel that residents in communities without public transportation have fewer choices available to them.

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The combination of public transportation's impact on the community (based on the difference score) and the importance of each issue provide a more comprehensive assessment of the strength of each issue. Issues falling near the upper right quadrant of Figure 16 identify those that are the most important and most distinguishing characteristics of public transportation. These are the messages that should be emphasized.

Figure 16



Based on both the importance of different themes and the comparative benefit of these themes in cities with and without public transportation, the most powerful messages build on the following themes:

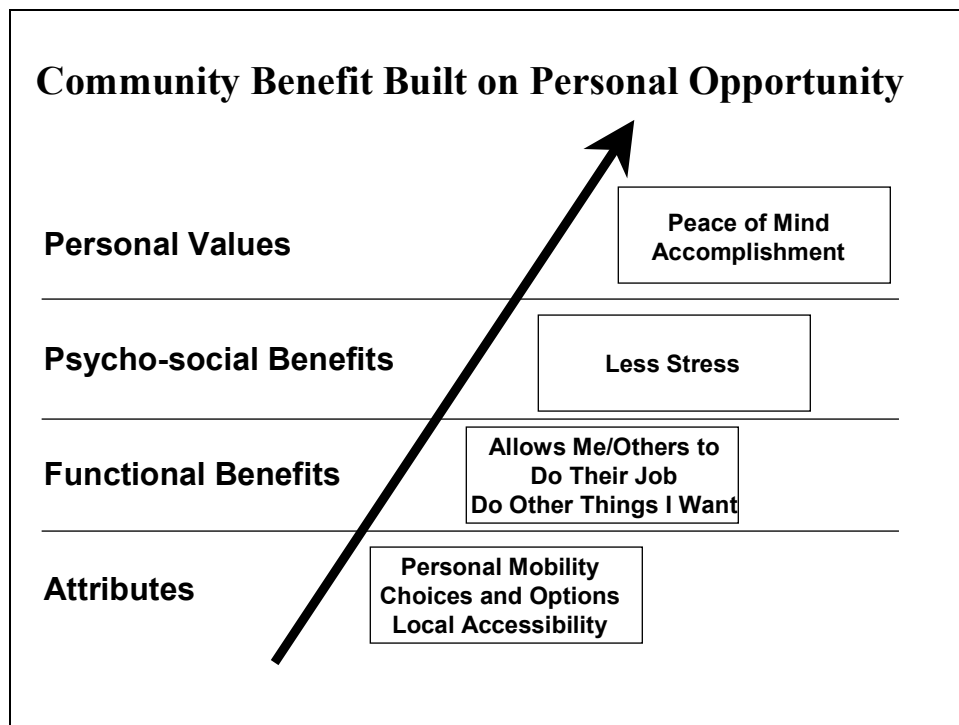
- Having lots of *choices and options* available;
- *Easy access* to things you need in everyday life;
- Providing *opportunities for people from every walk of life*; and,
- Having *mobility and freedom* to do what you most want to do.

These message priorities are identical to those that most resonate with Americans.

Personal Values Underpinning Support for Public Transit

In the US, the qualitative values laddering research provided additional insight on the key messages and the personal values underlying them. The dominant values orientation—***Community Benefit Built on Personal Opportunity***—is centered around the *opportunities* provided by *mobility, choice, and accessibility*. The interpretation of this ladder of mostly non-riders indicates that the opportunities made possible by personal mobility, access and transportation choices help people to be able to *do their jobs* or *get other things they want done*. This makes people feel *less stress* and, more importantly, to feel greater *peace of mind* in their ability to *accomplish* things that are most important to them. Collectively, the whole community—not just riders—benefits by the fulfillment of many individual, personal opportunities. Non-riders feel a personal benefit in seeing others in their community enjoy personal accomplishments and fulfillment due to their ability to exercise transportation options. Qualitative research in Canada indicates that the same values orientation – *Community Benefit Built on Personal Opportunity* – exists and resonates with Canadians. There are, however, slight differences in that Canadians are more likely than Americans to mention Happiness, Freedom, and “Completeness” as motivating values.

The strength of this dominant orientation and these themes are consistent across regions and subgroups. As in the US, *choice, access, opportunity* and *freedom/mobility* are the most important of the 12 tested themes in all nine regions.



It is important to note that the same primary message resonates most strongly with both swing and pro-transit supporters.

8 STRATEGIC PLAN

*If to do were as easy as to know what were good to
do, chapels had been churches and poor men's
cottages princes' palaces.*

William Shakespeare
The Merchant of Venice

Creating a more positive and supportive environment for public transit is the primary objective of the proposed effort. Before this project began, there were many ideas and hypotheses about how to best pursue this objective; but there was uncertainty about which held the most promise. This strategic plan lays out the blueprint for a program that offers the greatest promise for creating a more positive and supportive environment for public transit.

This strategic plan distills the key learnings and insights of the situation analysis, media audit, research audit, the research team's industry and professional experience, and our newly acquired understanding of the personal values underlying the public's relationship with public transit into a simplified and focused plan. The strategic plan outlines the critical guiding principles that will direct the numerous tactical recommendations to be developed in a marketing plan. This plan mirrors that which was prepared for the US work and is intended to provide Canadian audiences with strategic guidelines for their communication efforts.

The strategic plan consists of five key components:

- Defining strategic and communication goals
- Outlining the Brand Force™ Statement, a single statement that captures the primary message or strategic positioning for public transit. Note: this Brand Force™ Statement is based exclusively on the research conducted in the United States. However, the qualitative and quantitative research conducted in Canada indicates that this statement is relevant to Canadian audiences as well.
- Identifying support messages and considerations, which underpin the Brand Force™ Statement.
- Prioritizing target audiences for the messages and positioning.
- Outlining national, regional, and local level roles and approaches.

Strategic and Communication Goals

The primary goal of this effort is to create a more positive and supportive environment for public transit by creating a strong national public transit brand built on public recognition of the positive personal benefits public transit provides to all citizens, not just riders.

The success of this effort depends on an organized communications campaign that speaks with one voice, promoting a consistent and reinforcing message inside and outside the industry at the national, regional, and local levels.

Public Transportation Positioning: Brand Force™ Statement

Results of the research in both the US and Canada clearly indicate that public transportation provides a powerful, positive personal benefit to all citizens:

Public transportation enriches and gives energy to whole communities by enabling people from all walks of life to access opportunities that allow them to grow, develop, and accomplish.

Every community benefits as a result of the opportunities provided by public transportation's mobility, choice, and accessibility. These opportunities generate a pride and peace of mind among all citizens in the community, derived from the accomplishments of people getting their jobs done or accomplishing other things important to them. Collectively, the whole community benefits through the fulfillment of many individual personal opportunities. This is what best defines the desired public transportation **brand**.

Underpinnings of the Brand Force™ Statement

In Canada as in the US, the support for the positioning statement that defines the public transportation brand is built on four themes that demonstrate the highest levels of personal importance and are clearly recognized as the greatest positive impacts or benefits of public transportation:

- Providing **opportunities for people from every walk of life**;
- Having **lots of choices and options** available;
- **Easy access** to things you need in everyday life; and
- Having **mobility and freedom** to do what you most want to do

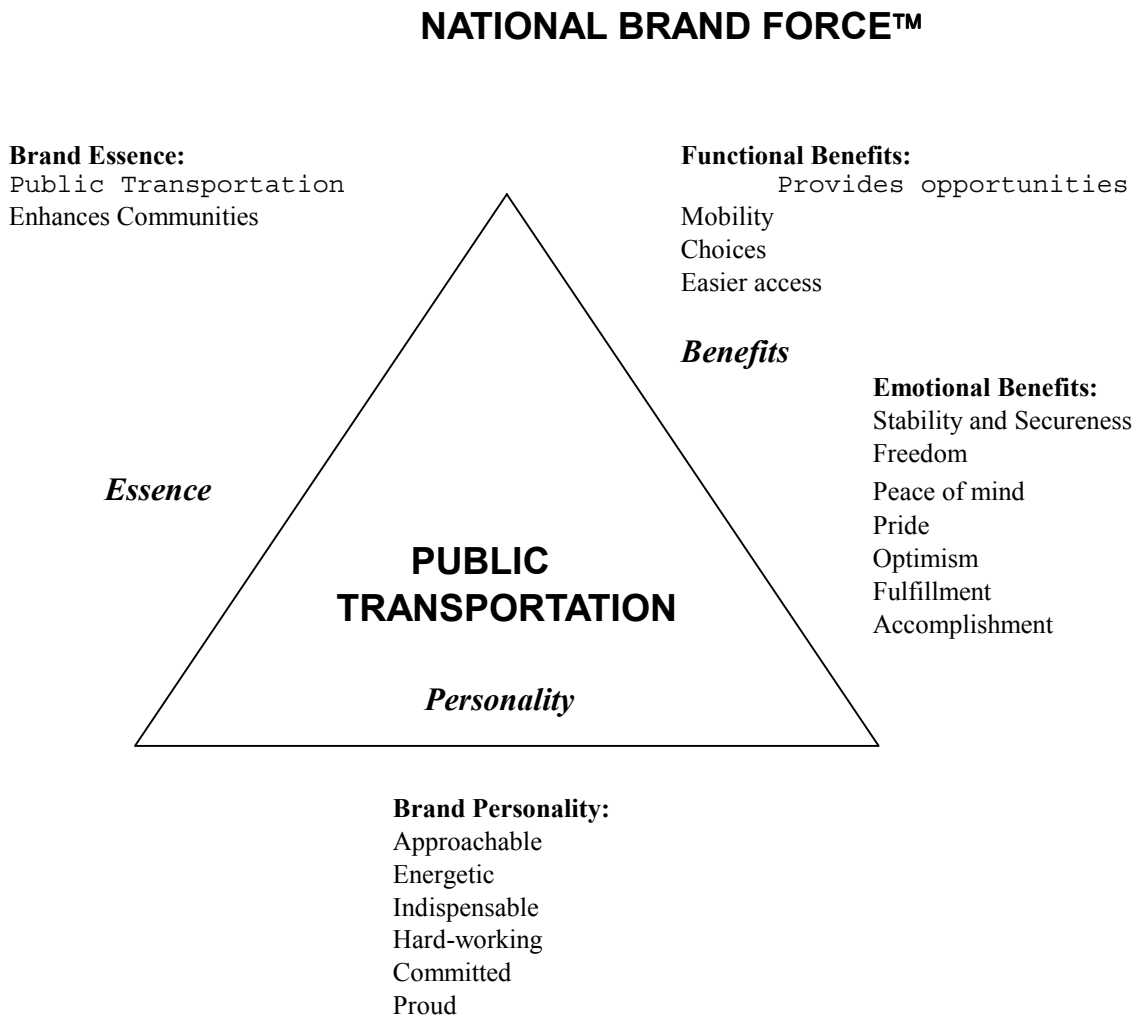
The brand also needs to be supported with a tone that reflects emotional benefits of public transportation for all people who live in the community:

- Accomplishment
- Secureness and stability
- Peace of mind
- Freedom
- Pride
- Optimism
- Fulfillment

Finally, this brand, like all successful brands needs to be identified by key character traits that give it a face and personality worthy of building a personal relationship:

- Approachable
- Energetic
- Indispensable
- Hard-working
- Committed
- Proud

The figure below shows the key components of the desired **Brand Force™** for Public Transportation. Again, this model is based on the US data but is relevant and appropriate for Canada.



Target Audiences

Quantitative research indicates that the following groups are the target audiences for this effort. The Canadian target audiences are identical to those in the United States.

Primary: The 29% of the Canadian population that are neither supporters nor non-supporters of public transportation, **swing supporters**, are the primary target audience for this communications campaign. About half of these people are unfamiliar with public transportation in their areas, but nevertheless have positive things to say about public transportation. There is plenty of room to increase both familiarity and positive awareness of public transportation among swing supporters. The profile of the swing supporter generally matches the profile of the average Canadian.

Secondary: **Influentials**¹⁴ are a critical secondary target, due to their influence. About one-in-seven (14%) Canadians are Influentials. There is no significant concentration of Influentials among opposition, swing, or supporters groups. Targeting Influentials can magnify the impact and efficiency of the overall message and campaign.

The **Media** filter most of the information the public reads about public transit. When treated appropriately, this important group becomes a gateway to positive news stories for increased visibility and industry prestige. The media also can become a conduit for the positive message of this strategic plan.

National, Regional, and Local Level Roles

The research underpinning this strategic plan makes clear that this campaign is ideally suited to a national campaign due to the uniformity of appeal of the main message and the reachability of target audiences across systems and regions. The broad appeal of a national campaign focusing on the personal values delivered by the *Community Benefit Built on Personal Opportunity* positioning provides a common framework and strong appeal nationwide.

A national campaign, however, would not be complete without important contributions from the regional and local level. A national campaign by itself ignores the strength and capability of the regional and local systems already engaged in communicating with people in their areas of influence. The current national image of transit is largely built on the sum of perceptions of each of the individual systems. With the introduction of a national campaign, the image of public transit will be a combination of national and local image efforts.

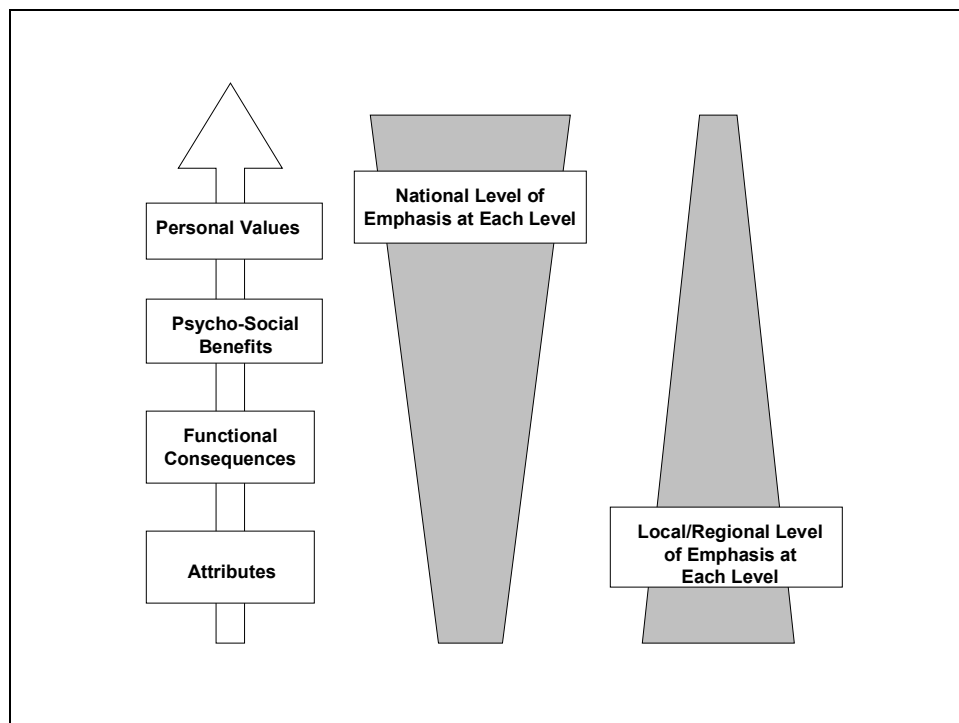
¹⁴ Influentials are not legislators or government employees. They are community and neighborhood opinion leaders who can play a prominent role influencing public opinion in a circle of influence much larger than the average person.

The effectiveness of the national campaign's message will hinge directly on its consistency and credibility in relation to perceptions of the local or regional system and their communications.

In this regard, the communications emphasis of the national and regional/local roles are distinct and interdependent.

The national campaign focuses on making Canadians more aware and appreciative of public transit's desire to make communities better through their capability to deliver the personal value of peace of mind. This peace of mind comes from the opportunity they have to accomplish things that are most important to them and those they care about in the community by supporting public transit. Although the national campaign will use the key attributes (personal mobility, choices, options, and accessibility) and their benefits (do other things I want, allows me/others to do their job), the emphasis in the national campaign is to make clear the personal values public transit provides.

The regional/local effort focuses on making people within their area of influence more aware and appreciative of their efforts and capability to provide personal mobility, choices, options, and accessibility for people from all walks of life in the community (not just the stereotypical public transit users). Although the regional/local efforts will use the personal values (peace of mind and accomplishment) to tell their story, the emphasis should make clear the regional/local system's efforts to provide the key attributes and benefits.



In addition, regional/local efforts need to investigate and integrate additional messages as appropriate to their area as capitalizing on the unique appeals within regions can strengthen the overall message and impact.

This campaign will benefit significantly by harnessing the power and capabilities that exist across all levels of the public transit industry organization. The campaign should be seen as a national campaign with a consistent national message emphasizing the key personal values that can be made to resonate more powerfully when reinforced by regional and local transit organization efforts that garnish the national message with local flavor and by emphasizing the key attributes and benefits being sought by regional/local systems. All three levels play important parts in building the overall success of the campaign.

NATIONAL LEVEL: The national level is the cornerstone of the industry campaign.

Several characteristics describe the effort at the national level:

- The national message focus should be on telling the story of how public transit can deliver the key personal values.
- The national message should embody the **Brand Force**TM positioning statement, benefits, and personality.
- The national message should reflect a broad appeal—positively impacting all regions and system sizes.
- Executions of the national message should be research-tested to ensure effectiveness.
- The national message should be targeted to maximize its reach to swing supporters and Influentials.
- Based on the research team’s thinking at this time, the national message should rely heavily on television advertising. Radio and print advertising should also be explored and considered based on recommendations of the agency selected. Internet driven messages should also be explored and carried out as deemed beneficial.

LOCAL AND REGIONAL LEVEL: It will be important to coordinate and align local and regional activity as much as possible with the national level campaign.¹⁵ Some regions within Canada are already beginning to explore and pursue programs designed to improve image or ridership. Moreover, all local systems dedicate some level of activity toward image and ridership. While the emphasis in this case is on image, the degree to which national efforts align with local or regional efforts, the better chance both have to build on the accomplishments of the other and increase in their success.

The most important role of the regional/local effort will be to provide substance to the attributes and benefits of the *Community Benefit Built on Personal Opportunity* communications orientation.

¹⁵ Local and Regional levels are considered here jointly due to the fact that the strategic recommendations discussed here can apply at both local and regional levels—particularly given the massive size of some local systems. Nevertheless, the discussion will make it clear when suggestions or recommendations apply at just one level.

This can be done by emphasizing successes as well as needs and plans for enhancing personal mobility, choices, accessibility, and options for people from all walks of life in the community.

There is an additional reason to consider regional efforts separate from the national effort. Each region has a unique combination of issues that matter to them although the *Community Benefit Built on Personal Opportunity* orientation is the most important across all regions and systems. The salience of these issues can be used to leverage public awareness and support on top of the appeals being made in the national level campaign.

Local systems will likely have similar research to indicate unique appeals that can be used to compliment national communications within their system. Finally, when developing local messages, the research team's experience indicates that the most successful approach is one in which the advertising is more friendly, upbeat, and lighthearted.

Perhaps the most important actions that should be taken to align the national effort with the regional and local efforts will be coordination and communication, as needed, with local and regional level communications and marketing personnel. Each local system, and a growing number of regional organizations, has resources and people working to improve image, public relations, and marketing. Everyday these people interact with key audiences having the potential to touch them with our message. Through training and education, the efforts of these valuable resources can be aligned with the new positioning at a local and more personal level.

Although national media can be targeted at Influentials and the Media, the frequent and personal interaction with these targets at the local and regional level make it imperative that these two targets also be reached through local and regional level efforts. In this regard, efforts should be made to learn about the specific regional and local capabilities and activities to best determine how they can be leveraged in support of the new public transit brand.

CONCLUSION

This research reveals a strategic direction for the Canadian transit industry that will ultimately strengthen the image of the industry by building upon existing positive perceptions and driving toward the key personal values relevant to public transit. Similarities in attitudes and opinions between US and Canadian residents allow for synergy with respect to the strategic image-building messages. While there are many themes that position public transit in a positive way, the overall message of *Community Benefit Built on Personal Opportunity* resonates best across all audience segments.

Specifically, the opportunities made possible by personal mobility, access and transportation choices help people to be able to do their jobs or get other things they want done. This makes people feel less stress and, more importantly, feel greater peace of mind in their ability to accomplish things that are most important to them. Collectively, the whole community benefits by the fulfillment of many individual personal opportunities. By positioning public transit in a way that triggers this perceptual orientation, and communicating to audiences in a way that triggers

these driving personal values, the public transit industry can influence its audience's perceptions and behaviors. Research further indicates that this communications campaign must be one with a consistent national message that can be made to resonate more powerfully when reinforced by regional and local transit organization efforts that garnish the national message with local flavoring and credibility.

9 APPENDIX MATERIAL

APPENDIX A: VISTA™ METHODOLOGY

Orientation To Values Research

Do personal values drive human behavior? Do preferences flow from those values? VISTA™, or Values In Strategy Assessment, a research tool developed by Wirthlin Worldwide, is founded on the premise that personal values shape preferences and evoke behavioral responses.

When applying this premise to fashion a conceptual framework for communications, it becomes evident that a communications strategy must tap into personal values, persuading by reason and motivating through emotion.

Values research lays open the preference structure of your target consumers, first, to observation, and second, to the influence of a communications strategy built on personal values. An organization whose communication succeeds in tying itself to the personal values of consumers is more likely to actuate people in their behavior. In essence, the product is positioned so that it embraces and represent those values widely shared among consumers, so they can see just how and where the product fits into their lives.

Values research produces a snap-shot of perceptions and preferences based on personal values. In the political arena, the values methodology allows voters to view themselves introspectively in relation to political figures and issues. In the marketplace, values research enables consumers to see themselves with the same deep, personal glance in relation to various goods and services. VISTA™ studies in general seek to assess the perceptual relevance of things political or commercial as they relate to the personal values of a given population.

This penetrating glimpse provides empirical insight into voter and consumer thought and behavior. That insight is then used as the basis for strategic action, whether it be communications development, product development, tracking, or targeted campaigning or marketing.

VISTA™ CONCEPTS

Values-based communication relies on the notion that people operate on three basic levels as they translate information that bears upon their lives. These three levels of perception are: the attribute level, the consequence level, and the personal values level. In sequence these three levels form a causal or associational relationship.

Laddering

Values research employs a qualitative interviewing technique called laddering. Laddering is an elicitation process whereby a values interviewer uncovers the respondent's cognitive associations at each increasingly abstract level of perception. Simply said, the interviewer guides the respondent to have a discussion with him/herself about something relevant to his/her life. The process traces how the respondent ultimately associates the personally-held values with the attributes of the laddered object, whether positive or negative.

The laddering concept is built on the body of theory known as means-end theory. In this case, the attributes of an object constitute the means which lead to or are cognitively associated with one's personal values, the ends or end states. The cause/effect chain features certain attributes which lead to certain other consequences, which ultimately foster or impede held personal values.

The Object

The interviewer engages the respondent by giving him/her "something" to think about. The interviewing process originates from and is attached to a phenomenon, either tangible or abstract in nature. We simply call this the object.

The specific purposes of a values study will dictate which objects are laddered. Most objects will, of course, be either political or commercial in nature. An object can be physical. It can also be something more abstract like a process, action, concept, principle, attribute, characteristic, or trait. Over the course of many VISTA™ projects, Wirthlin Worldwide laddered a wide variety of objects such as those that follow.

Physical Objects:

hamburger
cake mix
motor oil
cranberry juice
car
cereal
hospital
real estate development
a business
a factory
environmental issues
political issues
politicians
business leaders

Processes, Actions:

customer service
car handling
insurance coverage
patient care

Concepts, Principles, Issues:

abortion
social morality
pressure on youth
crime
drugs
economic issues
political issues
environmental issues
welfare system

Attributes, Characteristics, Traits:

aggressive
caring
listens to people
trustworthy
organized
unfair

There is certainly overlap between these conceptual distinctions. The point is that a variety of things can be ladderred successfully in values studies. The fact that we ask the respondent to talk about one of these objects underscores our assumption that the object in some way bears upon, influences, or is relevant to the respondent's life.

Attributes

The interviewer first elicits the object's attributes from the respondent. The attributes are simply the properties of the object. Respondents usually provide attributes in the form of adjectives or descriptive phrases. For example, the attributes a respondent uses to describe a rural environment might include clean air, fresh water, grassy fields, and forests.

Consequences

Consequences are the benefits or liabilities that flow from the attributes. They further define the attributes by giving them greater meaning in the way they affect an individual. Laddering the rural environment example, we might find some of the consequences to include enjoyable surroundings, air that is healthy to breathe, water that is safe to drink, streams and lakes populated with fish, and beautiful surroundings.

Values

The laddering process terminates when consequences eventually bear directly on personal values. Their influence may be either consistent or inconsistent with those values. In the environmental example, the personal values possibly associated with the consequences could include a sense of peace, concern for future generations, and quality of life.

Positive and Negative Sides

There is a positive and negative side to most everything in life. The positive attributes of a ladderred object lead to consequences that contribute or are consistent to personal values, while the negative attributes lead to consequences that run contrary or are inconsistent with those values. We can anticipate that objects will, by their natures, often have dual characters, meaning they will possess both positive and negative attributes.

For instance, the attributes of a housing development will be both positive and negative in the eyes of respondents. A housing development may be perceived both to displace greenbelt and to be expensive, yet it is well-planned and brings a bigger tax base.

Furthermore, for the purposes of some studies, we may want to define an object as inherently negative by having a respondent define something considered a "problem." If we ladder what we ask a respondent to consider the most important problem in his/her state, we thus cast the object as inherently negative. If the re-

spondent considers “education” as the most important problem, our interest is with what is wrong with education in the state, not what is right with it.

A logical laddering path is going to show us how the attributes of education--a lack of funding, overcrowded classes, poorly trained teachers--do not produce the values generally associated with education in the respondents mind. In these cases, it is meaningful to uncover laddering paths that leads both to values, as well as to trace those pathways that lead away from held values.

METHODOLOGY

The Screener

A screener questionnaire is developed to recruit respondents. The screener assures that respondents meet the sample specifications, filling the necessary demographic quotas.

The respondents are recruited by the research facility. Quota groups are monitored daily to assure accurate sampling.

The Protocol

The protocol draft is completed. The protocol is the discussion guide used by the interviewers in conducting the interviews. An important component of the protocol is identification of meaningful and workable objects. A good protocol with good objects will generate full laddering paths stimulus, such as which objects generate meaningful attributes and full laddering paths.

The protocol is reviewed with the client to determine any adjustments that are required to meet the study’s objectives.

The protocol is finalized, including formatting response sheets to facilitate interview coding.

Pretest

A pretest occurs in which three to ten interviews are completed. After completion, any appropriate changes or modifications are made to the protocol to enhance the quality of the interview and data produced.

A briefing and training session occurs with the values interviewers to assure familiarity with the protocol and successful administration.

Interviewing

Initial interviews are conducted. During the interviews,

the interviewing director and other members of the team research team monitor and review interviews to help assure optimal quality.

Interviewers conduct all interviews. Each interviewer records sequentially and in detail the attribute/consequence/value “ladders” or linkages elicited from the respondent. Each filled-in protocol is reviewed to assure that responses are clearly recorded for coding accuracy.

Coding/Content Analysis

Laddering interviews involve the creation of a lexicon built from the words respondents invoke to describe the broad range of attributes, consequences, and values central to the study. The lexicon provides the pool of words and phrases from which codes are built.

Upon completion of the interviews, interviewers build initial codes. The coding process organizes and classifies lexicon elements from all respondent ladders into related categories. Codes are thus broad categories which encompass related attributes, consequences, or values.

The professional coding team is briefed by the coding director concerning the study, its objectives, the initial codes, and their meanings. Several rounds of coding may be necessary.

The interviews are coded by the coding team. New attribute, consequence, and value codes are added as they are encountered. As the previous number of codes are collapsed, a final round of coding produces a final and complete number of attributes, consequences, and value codes.

Linkage Analysis

This process utilizes proprietary software developed by Wirthlin Worldwide to determine the dominant paths and strengths of relationships between attributes, consequences, and values. Wirthlin Worldwide’s Analytical and Consulting Team combine the methods of counting, scaling, and statistical analysis to plot dominant pathways. The dominant attribute, consequence, and value linkages become the blue print for developing a communications strategy.

A key criteria in this process is the ability of another researcher to replicate the results. In general, Wirthlin Worldwide takes multiple perspectives on the values data to assure that results are correct and represented by the data.

Values Maps Construction

To visually display the network of linkages of attributes, consequences, and values, and the dominant pathways among them, Hierarchical Value Maps are constructed for each ladderized object. Levels, relationships, pathways, and dominant pathways are all portrayed through this visual format.

It is this final representation of perceptual links that forms the basis of a communications strategy which speaks directly to the terminal values most commonly cited by respondents.

The task of those who create communications executions then becomes to successfully link their product (candidate, service, etc.) and its attributes to the values of the target consumer (voter, customer), to such an extent that the product represents and becomes synonymous with those values.

STRATEGY DEVELOPMENT

Through personal observation, practical experience, and discussions with leading professionals in the field of advertising and communications, our experts know how to apply laddering research to real communications problems.

We offer VISTA™ within the framework of *Strategic Equity Management* (SEM™). SEM™ is a framework for considering problems in ways designed to sustain and increase the value of the enterprise, by understanding what drives target audience decision-making and leveraging that understanding into meaningful efficient communications strategies that yield measurable results.

Just a few of the many approaches we have pioneered include a variety of strategic thinking tools that can be used alone or in combination. The first three tools have a positive communication orientation, while the second three have a negative orientation.

Positive Tools

- **Reinforce** or strengthen the network of positive attributes, consequences and values associated with the “product” (issue, candidate, industry or company).
- **Refocus** by adding linkages between attributes and consequences or introducing new attributes or consequences to better differentiate the product.
- **Refine** messages to express a potential weaknesses so that it is perceived as a strength.

Negative Tools

- **Reframe** perceptions of the competition by messages designed to express a competitor’s apparent strength so that it is seen as a weakness.
- **Redirect** or divert attention away from a competitor’s strength to their weakness.
- **Remove** positive perceptions of a competitor by undermining a competitor’s strength by showing the strength doesn’t exist.

Criteria for Strategy Development

From experience we have learned that judging communication strategy by using a few simple criteria for strategy development can greatly enhance your opportunities for success. An organization’s communication strategy must:

- ... not be designed to operate in a vacuum
- ... build on the equity of its heritage
- ... be built to last
- ... be framed for internal and external audiences
- ... be able to withstand hostile fire

VISTA™ (*Values In Strategy Assessment*)™

DISCOVERING VALUES THAT
MOTIVATE CHOICES

Wirthlin Worldwide has developed an innovative, qualitative research program to help our clients understand, communicate with and motivate their publics more effectively.

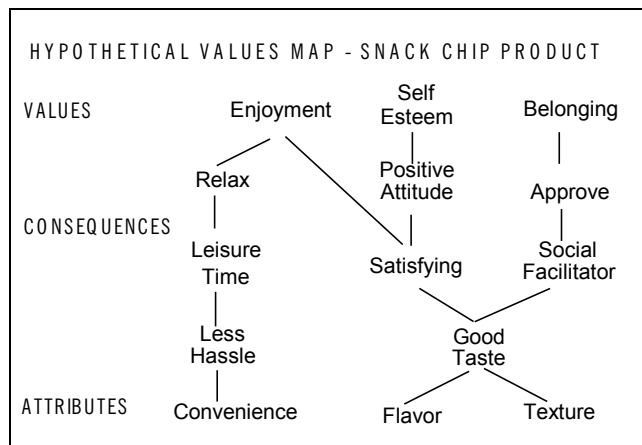
We call it Values In Strategy Assessment™ (VISTA)™. Our experience has clearly shown that effective communication not only persuades with reason, but motivates by tapping into personal values. While traditional methodologies assess communications tactics, VISTA™ guides your overall communications strategy by uncovering the deeper values that drive all human behavior.

A VARIETY OF APPLICATIONS

VISTA™ Values Research has been used to understand human decision making behavior in product, service and issue contexts. We have also used it successfully in political campaigns and corporate positioning.

A VISTA PROGRAM HAS SEVERAL STAGES

It starts with thorough client consultation to understand the objectives and issues. In-depth personal interviews are then conducted by highly specialized interviewers, using a linking interviewing technique. Transcripts of those interviews are analyzed to identify *attributes* used by consumers to differentiate between one product (service, issue, candidate, etc.) and another, *consequences* of using that particular product, and how those consequences are linked to their own personal *values*. Finally a hierarchical “laddering” of attributes, consequences and values is constructed.



THIS GRAPHIC “VALUES MAP” PROVIDES A TOOL TO HELP YOU:

- Develop an effective communications strategy which taps into key motivating values
- Test message executions to make sure they are in line with the chosen strategy
- Determine which messages are most effective with specific audience segments
- Evaluate the success of the resulting program

Whether you are marketing a new product, repositioning your corporate image, or running a political campaign, Wirthlin Worldwide’s VISTA™ research enables you to know what really matters to the people you are trying to reach. This understanding - coupled with our years of experience and proven insight - gives you the strategic edge you need to manage change effectively.

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APPENDIX C: TRIAD RECRUITING SCREENER

RECRUITING SCREENER - GENERAL PUBLIC TRIADS: CANADIAN EXTENSION

PERSONAL/CONFIDENTIAL

PROJECT #: 0000

WIRTHLIN WORLDWIDE

1363 Beverly Road

McLean, VA 22101

FINAL

May 3, 2000

Hello, I'm _____ from _____, a local research firm. We are talking with people in the _____ area this evening. We are not selling anything, we are only interested in your opinion on some issues important to people like yourselves.

Are you 18 years of age or older?

- 1 YES [CONTINUE]
- 2 NO [ASK Q.B]
- 3 DON'T KNOW/REFUSED [ASK Q.B]

IF "NO, DK/REFUSED", ASK:

B. May I please speak to someone in your household who is 18 years of age or older? [DO NOT READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]

- 1 YES [REPEAT INTRODUCTION THEN CONTINUE]
- 2 NO [THANK AND TERMINATE]
- 3 DON'T KNOW/REFUSED [THANK AND TERMINATE]

[IDENTIFY GENDER BY VOICE. Please get a mix per triad group.]

- 1 MALE
- 2 FEMALE

1. Please stop me when I read the category with your age. **[Please get a mix per triad group.]**

- 1 < 21
- 2 21 - 24
- 3 25 - 39
- 4 40 - 54
- 5 55 - 64
- 6 65 - 74
- 7 75 OR OLDER [THANK AND TERMINATE]

2. Do you or does anyone in your immediate family work for a market research company, a market research department, or in public transit or transportation related industries such as airlines, car dealers, Department of Transportation?

1 YES [THANK AND TERMINATE]
2 NO
3 [DO NOT READ] DON'T KNOW/REFUSED [THANK AND TERMINATE]

3. Have you participated in a focus group discussion or any other market research study within the past six months?

1 YES [THANK AND TERMINATE]
2 NO
3 [DO NOT READ] DON'T KNOW/REFUSED [THANK AND TERMINATE]

4. I am now going to read you a list of ways people commute to work, shopping centers, the theater, etc. For each method I read, please use a scale from 0 to 10, where a rating of "0" means you feel NOT AT ALL FAVORABLE toward that method of transportation, while a rating of "10" means you feel EXTREMELY FAVORABLE toward that method of transportation. Remember, we just want to know your opinion, with 0 being NOT AT ALL FAVORABLE, and 10 being EXTREMELY FAVORABLE. The first/next method of transportation is _____ [READ AND RANDOMIZE MODE. RECORD EXACT RATING FOR EACH METHOD.]

RATING

A PUBLIC TRANSIT [TERMINATE IF RATING LESS THAN 4.
INTERVIEWER: This category includes public bus, rail/ subway. It does not include private transportation such as taxis, and carpools.] _____

B CARPOOLING WITH A FRIEND _____

C DRIVING YOUR OWN CAR _____

5. Have you used a public transit system in the past year?

1 YES [ASK Q.6A]
2 NO [SKIP TO 7, RECRUIT FOR NON-USERS GROUP]

- 6A. Would you say you have used a public transit system MORE or LESS than **three** times in the **past 2 years**?

1 MORE THAN THREE TIMES [ASK Q.6B]
2 LESS THAN THREE TIMES [SKIP TO Q.7, RECRUIT FOR NON-USERS GROUP]

- 6B. And have you used a public transit system MORE or LESS than **three** times in the **past week**?

1 THREE OR MORE TIMES [ASK Q.7, RECRUIT FOR USERS GROUP]
2 LESS THAN THREE TIMES [THANK AND TERMINATE]

7. And, overall, how long have you been using public transit? [RECORD EXACT RESPONSE] [Please get a mix per user group.]

8. How many vehicles in operating condition do you have in your household? [DO NOT READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]

- 1 1
- 2 2
- 3 3
- 4 4 or more
- 5 DON'T KNOW/REFUSED

9. What was the last year of formal education that you completed? **[Please get a mix per triad group.]**

- 1 HIGH SCHOOL OR LESS
- 2 HIGH SCHOOL GRADUATE
- 3 SOME COLLEGE/VOCATIONAL
- 4 COLLEGE GRADUATE
- 5 POST GRADUATE DEGREE

10. What is your household's yearly income in total before taxes? **[Please get a mix per triad group.]**

- 1 UNDER \$30,000
- 2 \$30,000 TO LESS THAN \$40,000
- 3 \$40,000 TO LESS THAN \$55,000
- 4 \$55,000 TO LESS THAN \$75,000
- 5 \$75,000 AND ABOVE
- 6 **[DO NOT READ]** DON'T KNOW/REFUSED **[THANK AND TERMINATE]**

IF QUALIFIED, GO TO INVITATION

INVITATION

We are interviewing some people here in _____ and would like to invite you to participate. We will be talking about issues related to transportation issues in your area. We are not selling anything. We only want to get your honest opinions. The interview will be conducted In a group setting and will last approximately **two** hours. You will receive \$_____ for your time as a token of our appreciation.

Can we count on your participation?

- 1 YES [SCHEDULE INTERVIEW]
- 2 NO [THANK AND TERMINATE]

The discussion will be conducted on _____ [DAY AND DATE] at _____ [TIME].

May I confirm your name, address, and a telephone number where you may be reached so that we can confirm your interview?

NAME: _____

ADDRESS: _____

CITY: _____

STATE: _____

ZIP CODE: _____

HOME TELEPHONE NUMBER: _____

WORK TELEPHONE NUMBER: _____

INTERVIEWER: _____

DATE: _____

TIME: _____

REMINDER CALL BACK COMPLETED ON [DATE/TIME]: _____

INVITATION LETTER SENT ON [DATE]: _____

APPENDIX D: TRIAD MODERATOR'S GUIDE

PERSONAL/CONFIDENTIAL
WIRTHLIN WORLDWIDE
1363 Beverly Road
McLean, VA 22101
CANADIAN EXTENSION

Start Time: ____ AM/PM
End Time: ____ AM/PM

May 10, 2000: ESTIMATED TIME: 1 HOUR & 50 MIN
BID TIME: 2 HOURS

Location:

- ☐ **Toronto (May 10)**
- ☐ **Kitchener (May 11)**
- ☐ **Montreal (May 15)**
- ☐ **Sherbrooke (May 16)**
- ☐ **Vancouver (May 17)**
- ☐ **Victoria (May 18)**

Transit Agency Size:

- ☐ **Small**
- ☐ **Large**

Segment:

- ☐ **User**
- ☐ **Non-User**

Moderator: _____

Participants: _____

Number Recruited: _____

Number In Attendance: _____

INTRODUCTION (5 MIN.)

Section objectives are to introduce the topic, set the ground rules, and have participants introduce themselves to the moderator and each other.

Thank you very much for attending this discussion group. My name is (FIRST AND LAST NAME) and I work for Wirthlin Worldwide, an independent market research company.

As you were probably told when you were recruited, today we will be talking about transportation issues.

This meeting will take approximately two hours and, hopefully, you will find it enjoyable and stimulating.

Before we get started there are a few things I need to mention:

- We have a full agenda planned and won't be taking any breaks.
- This is not a sales pitch and no one will contact you to sell you anything we will be discussing today.
- We are conducting this research for a client and, considering the cost of implementing some of your recommendations, this client sincerely wants to confirm that they understand exactly what you are thinking in terms of these recommendations.
- Because of this, I will be asking a lot of probing questions, some of which may seem redundant to you, or the answers may appear obvious. Please be patient with this process; it is essential to the research we are conducting.
- I want to assure you that anything you say is strictly confidential and is never reported in any way that connects your particular comments to you personally.
- All I ask, then, is that you be as honest and candid as you possibly can be.
- There are no right or wrong answers. Just let me know how you truly feel. If you disagree with something that someone else says, please speak up!
- At the conclusion of this research, we will write up a report for the client. Because we can't remember everything you say, we are recording this session.
- Because we are recording it, please don't talk when someone else is speaking as the tapes will be impossible to understand.
- Despite the fact that we do submit a report, our client is so interested in what you have to say that they want to hear it in your own words. As such, there is a strong possibility that they are sitting in the next room observing what is going on through this (POINT) one way mirror.
- Last but not least, please no smoking while you're in this room. And if you have a cellular telephone with you, please turn it off.

Does anyone have any questions? If not, why don't we get started.

As a way to get started, please introduce yourself and tell us where you work and what you do in your job. If you don't work, please tell us what you do on a daily basis.

BACKGROUND/CONTEXT: TRAVELING/TRAVEL CHOICES (15 MIN.)

Section objectives are to begin to get participants talking about transportation, specifically the choices they make, images that come to mind, and transportation challenges facing their community. This information “sets the stage” for the balance of the discussion.

NOTE: FOR USER GROUPS, ASK Q 3 & 4 BEFORE Q. 1 & 2.

- 1 . To begin, please tell me what form(s) of transportation you use to get to work/school/doing errands etc. each day. What about to activities on the weekend or in the evenings?

- 2 . What do you believe are the greatest transportation challenges your community is currently facing? [Note: if not mentioned, probe for too much traffic, congestion, aggressive driving, road rage, highway construction, sprawl, pollution, air quality, etc.]

3. Why is that an important issue for you? How does [INSERT TRANSPORTATION CHALLENGE] impact you in your daily life?

GENERAL IMPRESSIONS OF PUBLIC TRANSPORTATION (10 MIN.)

Section objectives are to elicit participants' general perceptions, images, and feelings toward public transportation, as well as learn about the terminology they use to describe public transportation.

NOTE: MOVE THROUGH THIS SECTION QUICKLY.

- 1 . Now, please think about the alternative ways that people get around. Other than a personal vehicle, what do people use to get around? What do you typically call that type of service? [Moderator: we are looking for whether or not people use mass and/or public transit/transportation terminology, or some other language. We DO NOT WANT names of local transit systems.]

- 2 . I'd like to talk about some of these words and phrases. Let's start with (USE A TYPE OF SYSTEM MENTIONED IN Q. 1 ABOVE). I'd like you to tell me what differences there are – the images and feelings that come to mind – between the words (SELECT PAIRING BELOW, BASED ON TYPE OF SYSTEM STARTING WITH)....
[Moderator: make sure you understand and note whether these are positive or negative associations]:

A. "Public:" _____

vs.

B. "Mass:" _____

C. "Transit:" _____

vs.

D. "Transportation:" _____

MODERATOR: WE ARE PARTICULARLY INTERESTED IN SIMILARITIES OR DIFFERENCES BETWEEN "TRANSIT" AND "TRANSPORTATION." IS ONE MORE POSITIVE/ACCEPTABLE/A BETTER DESCRIPTOR THAN THE OTHER?

MODERATOR: ONCE YOU ARE CLEAR ON WHAT TERM THE GROUP PREFERS (I.E. "MASS TRANSIT," "PUBLIC TRANSPORTATION," ETC, USE THIS TERM WHERE APPROPRIATE THROUGHOUT REMAINDER OF INTERVIEW.

- 3 . Now, I'd like you to think about your impressions of a public transportation system in general and try to describe this transportation system with human characteristics and qualities. What would the transportation system look like? How would it dress? How would it act? How would you describe its personality? Would it be male or female? How old? What would it do for a living? Please write down some of your thoughts, and then we will discuss them. (HAVE RESPONDENTS WRITE DOWN NOTES PRIOR TO DISCUSSING.)

PUBLIC TRANSPORTATION: COMMUNITY AND PERSONAL AND PERSONAL RELEVANCE (30 MIN)

Section objectives are to understand the relevance – both to the community (area/region) at large as well as the individual. This information will help determine those issues that resonate strongly with participants and should form the basis of the ultimate messages. A laddering technique will be used to elicit attributes, benefits, and values for both positive and negative reasons. Each participant develops own ladder. Group discusses attributes, consequences, and values.

Everyone has different reasons for doing the things they do and for the choices they make. For example, I might choose foods I do because they are low in fat, low in sodium, because they taste good, because I like a particular ethnic food, because they aren't expensive, or because they are quick.

INSERT CREDIT CARD EXAMPLE

Similarly, each person has different reasons for thinking the way that they do about certain subjects or issues. What I'd like to do now is begin to understand the role that you believe a public transportation system plays in your community.

1. A. On the piece of paper in front of you, I'd like you to make a list of all the **POSITIVE** reasons why it is important for **your community** to have a strong public transportation system. [DISCUSS: CLARIFY AS NECESSARY AND DEVELOP A MASTER LIST OF REASONS]

PROBE UNTIL RESPONSES EXHAUSTED – ONE RESPONDENT AT A TIME.

B. Now, think about your own personal situation. On the piece of paper in front of you, I'd like you to make a list of all the POSITIVE reasons why public transportation is important **to you individually in your own life**. [DISCUSS: CLARIFY AS NECESSARY AND DEVELOP A MASTER LIST OF REASONS]

PROBE UNTIL RESPONSES EXHAUSTED – ONE RESPONDENT AT A TIME.

2. A. Now, out of all the reasons you listed, both for the community and for you personally, I'd like you to tell me which ONE you feel is the most important reason for having a strong public transportation system. Please write down the ONE you feel is most important, as well as the one that is second in importance, and then we will discuss what you selected.

RECORD MOST IMPORTANT CHOICE; DISCUSS.

PERSON #1

PERSON #2

PERSON #3

B. And which one of the reasons you listed would you say is the second most important reason for having a strong public transportation system?

RECORD SECOND MOST IMPORTANT CHOICE; DISCUSS.

PERSON #1

PERSON #2

PERSON #3

LADDER ONE (#1 POSITIVE ON PUBLIC TRANSPORTATION)

Now let's focus on why these are important reasons that your community has a strong public transportation system. Let's start with the most important reason you identified. In what way does that benefit your community? If a public transportation system provides (BENEFIT CITED), what does this do for the community?

CASUALLY LADDER IN CONVERSATIONAL WAY - MODERATOR RECORDS LADDER ON SEPARATE SHEET. PROBE UNTIL EXHAUSTED. VERY IMPORTANT TO GET TO VALUES LEVEL.

PERSON #1

PERSON #2

PERSON #3

LADDER TWO (#2 POSITIVE ON PUBLIC TRANSPORTATION)

Now let's look at the item you identified as the second most important reason that your community has a strong public transportation system. In what way does that benefit your community? If a public transportation system provides (BENEFIT CITED), what does this do for the community?

CASUALLY LADDER IN CONVERSATIONAL WAY - MODERATOR RECORDS LADDER ON SEPARATE SHEET. PROBE UNTIL EXHAUSTED. VERY IMPORTANT TO GET TO VALUES LEVEL.

PERSON #1

PERSON #2

PERSON #3

LADDER THREE (NEGATIVE ON PUBLIC TRANSPORTATION):

1. A. Now that we have discussed ways in which public transportation benefits a community, let's focus on any drawbacks – again to the community – of public transportation. Again, on the piece of paper in front of you, please write down all the reasons public transportation does not benefit the community, or in other words, please tell me why people don't want to support or fund public transportation. (HAVE THEM WRITE DOWN.)

RECORD RESPONSES FROM ALL PARTICIPANTS ON DISPLAY BOARD.
PROBE UNTIL RESPONSES EXHAUSTED – ONE RESPONDENT AT A TIME.

- B. And now thinking about your personally, what are all the reasons why public transportation does not benefit YOU? (HAVE THEM WRITE DOWN.)

RECORD RESPONSES FROM ALL PARTICIPANTS ON DISPLAY BOARD.
PROBE UNTIL RESPONSES EXHAUSTED – ONE RESPONDENT AT A TIME.

2. Now, out of all the reasons you listed, both for the community and for you personally, I'd like you to tell me which ONE you feel is the most important reason that having a strong public transportation system is not beneficial, either to you personally or to your community. Please write this down on your paper.

RECORD RESPONSE FOR EACH PERSON; DISCUSS.

PERSON #1

PERSON #2

PERSON #3

3. What challenges would this drawback present in your community or what problems occur because of it?

TIE RESPONSES TO DRAWBACKS. PROBE UNTIL RESPONSES EXHAUSTED.

PERSON #1

PERSON #2

PERSON #3

PUBLIC TRANSPORTATION MESSAGE ELEMENTS: IMPORTANCE VS. PERFORMANCE (25 MIN)

Section objectives are to understand the importance – both to the community and individual – of certain message elements. In order to collect information necessary for an analysis of equities and disequities of public transportation, a community's ability to provide these benefits is evaluated both in a context of having a strong public transportation system and not having a strong public transportation system.

1. Now that we've talked about your thoughts on why it is important both to your community and to you that your community has a strong public transportation system, I'd like you to react to some issues that other people like yourselves have said they think are important.

On the handout, you will see a list of characteristics that you might consider to be important or not. Please take a few minutes and think about what is really important, both to you and to your community and then evaluate each of these characteristics in terms of their importance both to you and to your community. You'll use a 10-point scale where 10 is "extremely" important to you or your community and 1 is "of average importance" to you or your community. Mark a number from 1 to 10 in each of the two columns on the handout.

(HANDOUT 1) (INTERVIEWER, MAKE SURE RESPONDENTS UNDERSTAND SCALE AND PROVIDE VARIATION IN THEIR RESPONSES.)

- A. A better or improved quality of life
- B. Cleaner air
- C. Less traffic congestion
- D. Economic growth and development for your community
- E. Easy access to things you need in everyday life, such as work, shopping and daycare
- F. Planning and preparing for the future
- G. Ensuring that tourists can get around the area
- H. Ensuring that you can get to work and/or school or where ever you need to
- I. Minimizing the stress and frustration in your life
- J. Have the mobility and freedom to do what you most want to do
- K. Making the right decisions, or those that impact your life in a positive way
- L. Residing in a livable and likable community and area
- M. Spending more time with friends and family, or those people you care about the most
- N. Being able to do what you most need to do
- O. Having more time to do the things you want to
- P. Having more money to spend as you would like to
- Q. Providing opportunity for people from every walk of life
- R. Having lots of choices and options available
- S. Safer roads, highways, and transportation for all drivers and commuters.

- 1 . Now I'd like you to put a star by the two or three issues in each column that you see as being most important, either to you or to your community, depending on the column. Why are these the issues that are most important to you and your community? FOCUS ON TOP 2-3 ISSUES.
- 2 . Now how relevant are the issues, if at all, to the concept of transportation? How important are the issues to the concept of transportation?
- 3 . Thinking about those things that are important to you, are there other elements that this list should include?
4. Now, please turn to the next handout. **(HANDOUT 2)** For some of the things on this list it doesn't matter whether or not there is a good public transportation system or not. For others it does matter. I'd like you to think about the benefits of public transit and the impact it has on communities. For each of the statements I read, please rate how well a community **without** a strong public transit system delivers these aspects. Again, let's use a scale from 0 to 10 where "0" would mean the community DOES NOT DELIVER AT ALL and "10" would mean the community DELIVERS EXTREMELY WELL.
5. Now, in the next column on this page, I'd like you to indicate how well a community **with** a strong public transportation system delivers on the same issues.
6. What are the issues that you think a community without a strong public transportation system cannot provide and why? FOCUS ON TOP 2-3.
7. What are the issues that you think a community with a strong public transportation system can provide and why? FOCUS ON BOTTOM 2-3 ISSUES.

POTENTIAL PUBLIC TRANSPORTATION MESSAGES (5 MIN)

1. Assume for a moment that you are responsible for creating a message that encourages someone to feel more favorable toward public transportation. What are the elements that, in your mind, absolutely must be included in the messages? Is there anything else that should be included in these messages?

CLOSE

1. Earlier in the discussion, I asked you to describe your impression of public transportation using human characteristics and qualities. I'd now like you to do the same thing, but I'd like you to describe a strong public transportation system that benefits your community and/or you personally. What would the transportation system look like? How would it dress? How would it act? How would you describe its personality? Is it male or female? How old is it? What does it do for a living? Please write down some of your thoughts and then we will discuss.
2. Finally, when you are thinking about an issue such as feeling favorable toward public transportation, it is possible to feel favorably toward public transportation because of how it is personally impacts or is relevant to you, or how it is relevant to your community. Out of 100%, please tell me what proportion of your feelings about public transportation have to do with PERSONAL reasons and what proportion has to do with reasons that impact your community, instead of you. [COLLECT RESPONSES FROM EACH INDIVIDUAL.] Why do you feel that way?

THANK AND CLOSE

HANDOUT 1

Please rate the importance of each of the following on a 10-point scale where “10” means the element is “extremely important” to you or to your community and “1” means the element is of “average importance” to you or your community. You may use any number between 1 and 10.

	<u>IMPORTANCE RATING</u> FOR	FOR YOUR
	YOU	COMMUNITY
A. A better or improved quality of life	_____	_____
B. Cleaner air	_____	_____
C. Less traffic congestion	_____	_____
D. Economic growth and development for your community	_____	_____
E. Easy access to things you need in everyday life, such as work, shopping and daycare	_____	_____
F. Planning and preparing for the future	_____	_____
G. Ensuring that tourists can get around the area	_____	_____
H. Ensuring that you can get to work and/or school or where ever you need to	_____	_____
I. Minimizing the stress and frustration in your life	_____	_____
J. Have the mobility and freedom to do what you most want to do	_____	_____
K. Making the right decisions, or those that impact your life in a positive way	_____	_____
L. Residing in a livable and likable community and area	_____	_____
M. Spending more time with friends and family, or those people you care about the most	_____	_____
N. Being able to do what you most need to do	_____	_____
O. Having more time to do the things you want to	_____	_____
P. Having more money to spend as you would like to	_____	_____
Q. Providing opportunities for people from every walk of life	_____	_____
R. Having lots of choices and options available	_____	_____
S. Making roads, highways and transportation safer for all drivers and commuters.	_____	_____

HANDOUT 2

Please think about the benefits of public transit and the impact it has on communities. In the **FIRST COLUMN**, for each of the statements below, please rate how well a community **WITHOUT** a strong public transportation system delivers these aspects. Please use a scale from 0 to 10 where “0” would mean the community **DOES NOT DELIVER AT ALL** and “10” means the community **DELIVERS EXTREMELY WELL**.

In the **SECOND** column, please rate how well a community **WITH** a strong public transportation system delivers these aspects. Please use a scale from 0 to 10 where “0” would mean the community **DOES NOT DELIVER AT ALL** and “10” means the community **DELIVERS EXTREMELY WELL**.

	WITHOUT PUBLIC TRANSPORTATION	WITH PUBLIC TRANSPORTATION
A . Its residents have a good quality of life	_____	_____
B . Has a good environment, or one that is relatively pollution free	_____	_____
C . Is safe to travel around due to low traffic congestion and minimal risk of accidents	_____	_____
D . Has strong economic growth and development	_____	_____
E . Has easy access to things its residents need in everyday life, such as work, daycare and shopping	_____	_____
F . Is forward thinking and preparing for the future	_____	_____
G . Allows tourists to get around	_____	_____
H . Has transportation options so that one can easily get to work and/or school, or where ever they need to go	_____	_____
I . Provides mechanisms to reduce stress and frustration	_____	_____
J . Provides residents with the mobility and freedom to do what they most want to do	_____	_____
K . Allows residents to make the right decisions, or those that impact their lives in a positive way	_____	_____
L . Contributes to a livable and likable community and area	_____	_____
M . Allows one to spend more time with friends and family, or those people they care about the most	_____	_____

HANDOUT 2 (continued)

Please think about the benefits of public transit and the impact it has on communities. In the **FIRST COLUMN**, for each of the statements below, please rate how well a community **WITHOUT** a strong public transportation system delivers these aspects. Please use a scale from 0 to 10 where “0” would mean the community **DOES NOT DELIVER AT ALL** and “10” means the community **DELIVERS EXTREMELY WELL**.

In the **SECOND** column, please rate how well a community **WITH** a strong public transportation system delivers these aspects. Please use a scale from 0 to 10 where “0” would mean the community **DOES NOT DELIVER AT ALL** and “10” means the community **DELIVERS EXTREMELY WELL**.

	WITHOUT PUBLIC TRANSPORTATION	WITH PUBLIC TRANSPORTATION
N . Ensures that residents are able to do what they most want to do	_____	_____
O . Ensures that residents have more time to do the things that they want to	_____	_____
P . Ensures that residents can spend their money as they would like to	_____	_____
Q . Provides opportunities for people from every walk of life	_____	_____
R . Provides lots of available choices and options	_____	_____
S . Makes roads, highways and transportation safer for all drivers and commuters	_____	_____

APPENDIX E: QUANTITATIVE QUESTIONNAIRE

WIRTHLIN WORLDWIDE
1363 Beverly Road
McLean, Virginia 22101

SCREENER

Hello, I'm _____ of Wirthlin Worldwide, a national research firm. We're talking with adult Canadians today about issues important to the area in which they live, and we'd like to get your opinions. We are not selling anything. For quality control purposes, my supervisor may monitor this call.

A. Are you 18 years of age or older? [DO NOT READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]

- 1 YES
- 2 NO
- 3 DON'T KNOW/REFUSED

IF "NO", ASK:

B. May I please speak to someone in your household who is 18 years of age or older? [DO NOT READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]

- 1 YES [REPEAT INTRODUCTION AND CONTINUE WITH QUX C]
- 2 NO [THANK AND TERMINATE]
- 3 DON'T KNOW/REFUSED [THANK AND TERMINATE]

C. In what city do you live? [RECORD EXACT RESPONSE]

D. GENDER [BY OBSERVATION]

- 1 MALE
- 2 FEMALE

BACKGROUND/CONTEXT

SECTION OBJECTIVE: *To better understand the importance and relevance of transportation issues vs. other leading community concerns. Justifying the rating given to TRANSPORTATION ISSUES will begin to focus the respondent's attention on the topic of the survey.*

[SPLIT SAMPLE: AS SUCH HALF THE RESPONDENTS WILL BE ASKED Q.1A-H AND HALF WILL NOT BE ASKED Q.1A-H; EACH ISSUE WILL HAVE AN N=1,050.]

1. Now I'd like you to think about several specific issues facing your LOCAL COMMUNITY or the REGION WHERE YOU LIVE. On a scale from 0 to 10, where "10" means you're VERY CONCERNED about the issue, and "0" means you're NOT AT ALL CONCERNED about the issue, please rate the following issues facing your community in terms of YOUR level of concern.

The [first/next] issue is _____ [READ AND RANDOMIZE ISSUES]. How concerned are you about _____ [ISSUE]? [RECORD EXACT RESPONSE]

ROTATE		RATING [0-10]
_____ A.	CRIME AND SAFETY	_____
_____ B.	AIR AND WATER POLLUTION	_____
_____ C.	QUALITY OF EDUCATION AND THE SCHOOLS	_____
_____ D.	LOCAL ECONOMY AND ECONOMIC GROWTH AND JOBS	_____
_____ E.	DECAY OF THE INNER CITY	_____
_____ F.	TRANSPORTATION ISSUES SUCH AS THE AVAILABILITY OF TRANSPORTATION OPTIONS, AGGRESSIVE DRIVING, AND COMMUTE TIME	_____
_____ G.	TRAFFIC CONGESTION	_____
_____ H.	HEALTH CARE	_____

TRANSPORTATION CHOICES

SECTION OBJECTIVE: *To understand respondent's current mode of transportation as well as to understand respondent's attitude toward Public Transportation vs. other modes of transportation.*

2. Thinking about how you get to and from your various activities outside the home - such as work, school, medical appointments and shopping - what form of transportation do you usually use? [READ RESPONSE CATEGORIES. RECORD AS MANY RESPONSES AS APPLY]

- 1 CAR / DRIVE
- 2 CARPOOL / RIDESHARE / VANPOOL
- 3 BUS
- 4 RAIL
- 5 WALK
- 6 RIDE A BIKE
- 7 MOTORCYCLE
- 8 OTHER
- 9 [DO NOT READ] DON'T KNOW/REFUSED

3. I am now going to read you a list of ways people in your community go to work, shopping centers, the theater, etc. I'd like you to think about the importance and impact that each has in the area where you live and for each method I read, please use a scale from 0 to 10, where a rating of "0" means you feel NOT AT ALL FAVORABLE toward that method of transportation, while a rating of "10" means you feel EXTREMELY FAVORABLE toward that method of transportation. Remember, we just want to know your opinion, with 0 being NOT AT ALL FAVORABLE, and 10 being EXTREMELY FAVORABLE. The first/next method of transportation is _____ [READ AND RANDOMIZE MODE. RECORD EXACT RATING FOR EACH METHOD.]

- A PUBLIC TRANSPORTATION
- B CARPOOLING WITH A FRIEND
- C DRIVING YOUR OWN CAR
- D TAKING THE BUS
- E WALKING
- F RAIL

IMPRESSIONS/AWARENESS OF PUBLIC TRANSPORTATION

SECTION OBJECTIVE: *To elicit feelings and images of Transportation, as well as to understand overall awareness of Transportation offerings in the community/region where respondent lives.*

For the following questions, please think of public transportation as publicly-sponsored bus, van, rail/subway services, trolley-car, or boat services. Public school buses and taxi cabs are not public transportation.

[SPLIT SAMPLE: AS SUCH HALF THE RESPONDENTS WILL BE ASKED Q.4A AND 4B AND HALF WILL NOT BE ASKED Q.4A AND 4B; LIKE MOST AND LIKE LEAST WILL EACH HAVE AN N=1,050.]

- 4A. What are some of the things you **LIKE MOST** about public transportation? [RECORD EXACT COMMENTS. PROBE ONCE: What else do you LIKE about public transportation?]

- 4B. And what are some of the things you **LIKE LEAST** about public transportation? [RECORD EXACT COMMENTS. PROBE ONCE: What else do you DISLIKE about public transportation?]

5. In general, how familiar would you say you are with public transportation services in your area, that is, types of services available, schedules, routes, etc.? Would you say you are.....[READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]

- 1 VERY FAMILIAR
- 2 SOMEWHAT FAMILIAR
- 3 NOT VERY FAMILIAR
- 4 NOT AT ALL FAMILIAR
- 5 [DO NOT READ] DON'T KNOW/REFUSED

6. As far as you know, is public transportation in your community or region where you live? [READ RESPONSE CATEGORIES. ROTATE RESPONSE TOP-TO-BOTTOM AND BOTTOM-TO-TOP. RECORD ONE RESPONSE]

- 1 READILY AVAILABLE
- 2 SOMEWHAT AVAILABLE
- 3 NOT VERY AVAILABLE
- 4 NOT AT ALL AVAILABLE
- 5 [DO NOT READ] DON'T KNOW/REFUSED

PUBLIC TRANSPORTATION USAGE

SECTION OBJECTIVE: *A quick read of respondent's current use of public Transportation services.*

7. Have you, personally, ever used the public transportation services within your community or the region in which you live? [RECORD ONE RESPONSE]
- 1 YES
 - 2 NO **[SKIP TO Q9]**
 - 3 DON'T KNOW/REFUSED **[SKIP TO Q.9]**
8. Which of the following categories best describes your use of public transportation in the past month? [READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]
- 1 NONE
 - 2 ONE DAY
 - 3 TWO TO SIX DAYS
 - 4 SEVEN TO TWELVE DAYS
 - 5 THIRTEEN TO TWENTY-NINE DAYS
 - 6 THIRTY DAYS OR MORE
 - 7 DON'T KNOW/REFUSED

PERCEIVED BENEFITS OF PUBLIC TRANSPORTATION

SECTION OBJECTIVE: *To understand the importance - on both a personal and community/area level - of perceived benefits of transportation. In order to collect information necessary for an analysis of equities and disequities of public Transportation, a region/area's ability to provide these benefits is evaluated both in the context of having a strong public Transportation system and not having a strong public Transportation system.*

9. Now, I am going to read you a list of things that some people say are important to them and the region where they live. I'd like you to tell me how important each item is to you and to the region or area. Please use a scale from 0 to 10 where "0" is NOT AT ALL IMPORTANT and "10" is VERY IMPORTANT.

What rating would you give _____ ? [READ AND RANDOMIZE STATEMENTS. RECORD EXACT RESPONSE.]

- A Cleaner air.
- B Less traffic congestion.
- C Economic growth and development in your community.
- D Easy access to the things you need in everyday life such as work, shopping and daycare
- E A better or improved quality of life.
- F Having mobility and freedom to do what you most want to do.
- G Building community spirit and making your community more livable.
- H Spending more time with friends and family members or those people you care about the most.
- I Having more time to do the things you want to do.
- J Providing opportunities for people from every walk of life.
- K Having lots of choices and options available.
- L Making roads, highways, and transportation safer for all drivers and commuters.

10.A I'd like you to think about the benefits of public transportation and the impact it has on communities. For each of the statements I read, please rate how well a **community without a strong public transportation system** delivers these aspects.. Again, let's use a scale from 0 to 10, where "0" would mean the community DOES NOT DELIVER AT ALL and a "10" would mean the community DELIVERS EXTREMELY WELL. What rating would you give _____ [COMMUNITY TYPE] for _____ [STATEMENT]. [RECORD EXACT RESPONSE]

[READ ALL STATEMENTS FOR COMMUNITY WITHOUT PUBLIC TRANSPORTATION SYSTEM - THEN READ ALL STATEMENTS FOR COMMUNITY WITH PUBLIC TRANSPORTATION SYSTEM.]

10.B Now let's think about a **community with a public transportation system** and how well it delivers on the same issues.

READ AND RANDOMIZE STATEMENTS. FURTHER, ROTATE 10A AND 10B SO THAT ONE HALF OF RESPONDENTS WILL GET ASKED Q.10A FIRST AND ONE HALF WILL GET ASKED Q.10B FIRST.

	10A COMMUNITY <u>WITHOUT</u> PUBLIC TRANSPORTATION	10B COMMUNITY <u>WITH</u> PUBLIC TRANSPORTATION
A Its residents have a good quality of life.	_____	_____
B Has a cleaner environment or has less pollution	_____	_____
C Dramatically reduced traffic congestion	_____	_____
D Has strong economic growth and development.	_____	_____
E Provides easy access to things its residents need in everyday life, such as work, daycare, and shopping.	_____	_____
F Provides residents with the mobility and freedom to do what they most want to do.	_____	_____
G Builds a sense of community and makes the community more livable.	_____	_____
H Allows one to spend more time with friends and family, or those people they care about the most.	_____	_____
I Ensures that residents have more time to do the things they want to.	_____	_____
J Provides opportunities for people from every walk of life.	_____	_____
K Provides lots of TRANSPORTATION choices and options.	_____	_____
L Makes roads, highways, and transportation safer for all drivers and commuters.	_____	_____

DEMOGRAPHICS

SECTION OBJECTIVES: *To gather respondent-specific information to allow segmentation/target audience identification.*

I have just a few more questions for statistical purposes only.

11. What was the last grade of formal education you completed? [DO NOT READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]
- 1 SOME HIGH SCHOOL OR LESS
 - 2 HIGH SCHOOL GRADUATE
 - 3 SOME COLLEGE
 - 4 COLLEGE GRADUATE
 - 5 SOME GRADUATE SCHOOL
 - 6 GRADUATE DEGREE
 - 7 REFUSED
12. What is your age, please? [DO NOT READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]
- 1 18 - 24
 - 2 25 - 29
 - 3 30 - 34
 - 4 35 - 39
 - 5 40 - 44
 - 6 45 - 49
 - 7 50 - 54
 - 8 55 - 59
 - 9 60 - 64
 - 10 65 - 74
 - 11 75 AND OVER
 - 12 REFUSED
13. What is your approximate annual household income before taxes? Is it.....? [READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]
- 1 UNDER \$10,000
 - 2 \$10,000 BUT LESS THAN \$20,000
 - 3 \$20,000 BUT LESS THAN \$30,000
 - 4 \$30,000 BUT LESS THAN \$40,000
 - 5 \$40,000 BUT LESS THAN \$50,000
 - 6 \$50,000 BUT LESS THAN \$60,000
 - 7 \$60,000 BUT LESS THAN \$70,000
 - 8 OVER \$70,000
 - 9 [DO NOT READ] DON'T KNOW/REFUSED

14. Which of the following best describes your household? [READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]
- 1 A COUPLE WITH CHILDREN UNDER THE AGE OF 18
 - 2 A COUPLE WITH NO CHILDREN UNDER THE AGE OF 18
 - 3 SINGLE WITH CHILDREN UNDER THE AGE OF 18
 - 4 SINGLE WITH NO CHILDREN UNDER THE AGE OF 18
 - 5 DON'T KNOW/REFUSED
15. Is there anyone over the age of 60 in your household? [DO NOT READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]
- 1 YES
 - 2 NO
 - 3 DON'T KNOW/REFUSED
16. Are you currently.....? [READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]
- 1 EMPLOYED FULL TIME OUTSIDE THE HOME [ASK Q.17]
 - 2 EMPLOYED PART-TIME OUTSIDE THE HOME [ASK Q.17]
 - 3 A STUDENT [SKIP TO Q.18]
 - 4 RETIRED [SKIP TO Q.18]
 - 5 A HOMEMAKER [SKIP TO Q.18]
 - 6 **[DO NOT READ]** OTHER [SPECIFY: _____] [ASK Q.17]
 - 7 **[DO NOT READ]** DON'T KNOW/REFUSED [SKIP TO Q.18]

17. What is your occupation? [DO NOT READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]

- 1 PROFESSIONAL / TECHNICAL
- 2 MANAGER / ADMINISTRATOR
- 3 PROPRIETOR / SELF EMPLOYED
- 4 PROFESSIONAL SALES
- 5 SKILLED / FOREMAN / CRAFTSMAN
- 6 CLERICAL
- 7 RETAIL
- 8 OPERATIVE
- 9 LABORER
- 10 DOMESTIC
- 11 SKILLED SERVICE
- 12 OTHER SERVICE
- 13 IN ARMED FORCES
- 14 OTHER (SPECIFY) _____
- 15 DON'T KNOW REFUSED

18. Which of the following best describes the area in which you live? Would you say the area is..... [READ RESPONSE CATEGORIES. RECORD ONE RESPONSE]

- 1 URBAN / IN A LARGE CITY
- 2 IN THE SUBURBS OF A MAJOR CITY
- 3 SMALL TOWN / SMALL CITY
- 4 RURAL WITH VERY FEW NEIGHBORS
- 5 **[DO NOT READ]** DON'T KNOW/REFUSED

19. Are you currently a registered voter?

- 1 YES
- 2 NO
- 3 DON'T KNOW/REFUSED

20. Now I'd like you to consider some different ways in which people express their opinions about issues. Thinking back over the last 12 months, _____ **[INSERT STATEMENT. CONTINUE UNTIL RESPONDENT ANSWERS "YES" TO FOUR STATEMENTS, THEN GO ON TO THE NEXT QUESTION.]**

- 1 YES
- 2 NO
- 3 DON'T KNOW / REFUSED

- A. Do you usually read the editorial page in the daily paper?
- B. Have you written to or telephoned a radio or television station to express your opinion?
- C. Have you taken an active part in some local civic issues?
- D. Have you written to the editor of a magazine or newspaper?
- E. Have you actively worked for a political party or candidate?
- F. Have you addressed or spoken before a public meeting (e.g. a PTA or School Board Meeting)?
- G. Have you written to or visited a public official about some matter of public business or to express your point of view on an issue?
- H. Have you written or said something that has been published?

21. And what is your postal code?

RECORD POSTAL CODE _____

May I please have your name - just in case my supervisor needs to verify that this interview actually took place?

And just to verify, the phone number I reached you at is _____ [READ PHONE NUMBER]

Those are all the questions I have for you today. Thank you very much for your time and cooperation. Have a pleasant day.

INTERVIEWER: _____ DATE: _____

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Abbreviations used without definitions in TRB publications:

AASHO	American Association of State Highway Officials
AASHTO	American Association of State Highway and Transportation Officials
ASCE	American Society of Civil Engineers
ASME	American Society of Mechanical Engineers
ASTM	American Society for Testing and Materials
FAA	Federal Aviation Administration
FHWA	Federal Highway Administration
FRA	Federal Railroad Administration
FTA	Federal Transit Administration
IEEE	Institute of Electrical and Electronics Engineers
ITE	Institute of Transportation Engineers
NCHRP	National Cooperative Highway Research Program
NCTRP	National Cooperative Transit Research and Development Program
NHTSA	National Highway Traffic Safety Administration
SAE	Society of Automotive Engineers
TCRP	Transit Cooperative Research Program
TRB	Transportation Research Board
U.S.DOT	United States Department of Transportation

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