

THE TRANSIT DESIGN GAME WORKBOOK

TCRP B-10 (PART 2)

**The Role of Transit Amenities and Vehicle Characteristics in
Building Transit Ridership**

TABLE OF CONTENTS

PART 1. OVERVIEW

- | | | |
|----|--------------|---|
| 1. | Introduction | 1 |
| 2. | Key Findings | 4 |

PART 2. HOW TO USE THE TRANSIT DESIGN GAME

- | | | |
|----|---|----|
| 3. | Developing Your Own Custom Survey | 6 |
| | Identifying the Issues: How to Look at a "Place" | 6 |
| | Selecting Features | 9 |
| 4. | Administering and Analyzing the Survey | 11 |
| | System Requirements and Starting the Software | 11 |
| | Preparing the Survey Form | 12 |
| | Administering the Survey | 19 |
| | Data Entry | 21 |
| | Data Analysis | 21 |
| 5. | Using the Transit Design Game to Conduct Focus Groups | 23 |

PART 3. GUIDE TO SELECTING FEATURES

APPENDIX

- | | |
|--|-------|
| Transit Design Game Findings From Five Case Study Cities | A - 1 |
|--|-------|

PART 1

OVERVIEW

CHAPTER 1

INTRODUCTION

Transit agencies are constantly striving to maintain and increase ridership levels. To make transit more attractive to current and potential riders alike, there is growing interest among transit operators in enhancing all stages of the transit experience by providing amenities and improving vehicle design characteristics. Transit agencies are, however, especially concerned with maximizing the impact of investments and focusing limited resources on those amenities that will have the greatest positive effect on ridership.

The Transit Design Game Workbook evolved from a study conducted for the Transit Cooperative Research Program: *The Role of Transit Amenities and Vehicle Characteristics in Building Transit Ridership (TCRP B-10.)* This comprehensive study addresses the value and impact that passenger amenities and transit vehicle design characteristics have on peoples' decisions to take transit and provides information regarding innovations in vehicle design and facility improvement, as well as trends in transit agency investment priorities in general. The results of this study are presented in a companion report, *Amenities for Transit Handbook*.

The Transit Design Game, developed specifically for this TCRP study to get at the heart of what transit passengers really want, was tested in five cities: Ann Arbor, Michigan; Aspen, Colorado; Portland, Oregon; Rochester, New York; and San Francisco, California. This survey was developed specifically to help transit agencies better understand what features on a bus or at a bus stop transit riders value the most and the extent to which they are willing to pay for them, in terms of foregoing a reduction in fare. Moreover, it serves as a tool for customer outreach and provides a means by which a transit agency can decide how best to tailor its facilities and transit vehicles to meet the needs of riders.

The Transit Design Game is not a typical survey that simply polls respondents as to the amenities they prefer. Rather, bus riders, for whom the survey was designed, are given 12 or 18 points to "spend" on a list of possible bus stop and vehicle features. Prices in the Game are set realistically, and the design allows for the testing of different levels of amenity (from "basic" to "deluxe") within the same category. Respondents must choose those features most important to them, foregoing others, within the budget given.

After the rider finishes making his or her choice, the questionnaire also asks respondents to make additional trade-offs between amenities and fare reduction. Respondents can choose between keeping all and some of the selected features or reducing the fare. Analysis of these results reveals the economic value of amenities to riders and tests rider perceived value of specific transit amenities. Finally, to support this analysis, the questionnaire asks respondents whether or not (and

to what degree) they might change their ridership habits following the introduction of their preferred amenities.

The use of the trade-off is what gives these types of survey credibility. It does not simply ask, "How many more transit trips would you take per week if there were a bench at your bus stop?"; rather, it makes individuals consider the actual worth of the bench in terms of their willingness to pay for it or to forego a fare decrease.

The Transit Design Game can be used even if a transit system already provides some of the features provided. In this case, riders should be asked to ignore what they already have, and if they want to have a particular amenity in the future, they should be prepared to "buy them back."

We developed the Transit Design Game after considering several other survey methods for estimating the effects of different amenities on transit passengers and ridership. The method selected, that of asking people to choose among a range of amenities while constrained by a fixed budget, seemed the most appropriate given the resources available and our need to make the task simple enough for someone to do while riding a bus.

The Game can be administered to a statistically valid sample, or it can be used to structure a passenger focus group. In both instances, the results have proven to be very revealing. Some of the key findings from our initial research in five cities are presented in Chapter 2, with more detailed results in the appendix. These are provided so that you can compare your results with other cities.

The Transit Design Game is not foolproof, and the findings should be considered in light of other market research. One of its limitations is that it is not self-explanatory to many riders and surveyors must assist passengers in filling it out correctly. Other limitations are described in the workbook, which follows.

What Is an "Amenity"?

During the interviews conducted for this study, there was some confusion when the term "amenity" was used. "Amenity" was felt by many to be almost synonymous with "frill": something not really essential and probably expensive and costly to maintain. Clearly, our interest is not in frills or in costly appurtenances. The focus, instead, lies in identifying design characteristics or features that can be incorporated into a vehicle or transit stop to enhance the transit experience in some way for passengers and encourage people to use transit by choice rather than only by necessity. **For this reason, we avoid the use of the word "amenity" in the actual Transit Design Game surveys and use the word "feature" instead.**

In addition, we must be careful about considering amenities as "optional." While it is true that some features can simply be added to a vehicle or transit stop, "optional" should not imply that an amenity is only an "add-on" after the fact. In fact, some transit agencies are thinking about design in a holistic manner, where new features are incorporated that cost no more than the "basics." For example, Seattle Metro has adopted a new approach to designing its buses. Rather

than adding amenities to an existing bus, Metro completely re-thought the vehicle's basic design and function and was able to design a better bus that costs no more to build than the existing one.

It is also important to emphasize that what is considered to be an amenity can, over time, become a necessity. For example, fully air-conditioned vehicles are now generally considered to be a necessity, rather than optional; the absence of air conditioning might turn riders away. Also, the Americans with Disabilities Act (ADA), which strives to improve access to transit stops and vehicles, requires certain design changes that were once optional; these requirements improve the transit environment for the general public as well as for patrons with disabilities. In Ann Arbor, low floor buses fall into this category: the entire bus fleet is being replaced because of positive response from *all* passengers.

Finally, it is also important to understand that an amenity does not have to be a physical object. A *person* can be an amenity. That is why some agencies feel that introducing fare technology, such as smartcards, will ultimately be successful: theoretically, it will free the driver from the task of collecting fares and allow him or her to concentrate on being friendly and helpful to passengers. Other studies cite the driver as one of the reasons cited for the success of mini-bus lines and jitney services. For these reasons, "driver courtesy training" is one of the features that a survey respondent can choose.

Format of the Workbook

There are three main parts to this Workbook:

- Overview – Chapters 1 and 2
- How to Use the Transit Design Game – Chapters 3,4 and 5
- Guide to Selecting Features

An appendix discussing the findings from the five case studies also is included.

CHAPTER 2

KEY FINDINGS

Our research in five cities yielded much useful information about amenities and their impact on passengers and ridership.

The research clearly shows that passengers consider amenities to be important and a majority of riders in most cities are willing to forego a fare decrease in order to have them. However, there does appear to be a limit to what riders are willing to "spend". For the 12-point survey, a range from 53% (in Rochester) to 70% (in Aspen) stated that they wanted to keep *both* the features they selected *and* the fare the same; only a range of 14% (in Aspen) to 23% (in Rochester) wanted to reduce the fare 10 cents and not keep the amenities selected. Increasing the budget to 18 points, however, actually reduced the percentage of riders wanting to keep the fare the same in most cities: many riders with an 18-point budget said they only wanted to spend 12 points and reduce the fare 5 cents. This means that the first 12 points spent on features is more valuable to riders than the next 6 points.

The research showed the highest priorities in all five cities (although not necessarily in the same order of preference) to be bus shelters, some padding for bus seats, and information (on board and at the stop.) In general, the preference was for a feature one step beyond the "basic". When ranked in order of preference by riders who said they were willing to forego a fare reduction, the results show that riders purchased the Route maps and schedules that cost 1 point, rather than elaborate electronic information systems that cost 4 or 5 points. Likewise, preferred shelters had only a roof (no walls or heating) and cost one point, although in cities like Rochester, Portland, and Aspen, the shelter with walls (4 points) was also highly ranked. Indeed the shelter with walls was one "expensive" feature that was selected by riders willing to forego the fare reduction. Other expensive features like fully padded seating with head and arm rests (6 points); quieter and smoother ride (6 points); and electronic on-board information (5 points) were less often selected by riders willing to forego a fare decrease.

Priorities for amenities vary according to the climate, characteristics of the city, and type of passenger. For example

- Heated shelters were preferred in cold climates like Rochester and Ann Arbor, while in rainy/windy Portland, the preference was for shelters with walls.
- Bike racks were more popular in Aspen, Portland, and San Francisco, where bicycling is more common, but of little interest to riders in Rochester.

- Security cameras were not desired much in Aspen, where crime is low, but were much more likely to be selected in San Francisco, Portland, and Ann Arbor where concerns about safety are more prevalent.

Passengers' transit riding patterns and demographic characteristics also influenced selections:

- More frequent riders were strongly interested in driver courtesy and on-board information--and were more interested in keeping the amenities, rather than reducing the fare.
- Riders with longer trips were more interested in security cameras (except in Aspen) and information at the stop (perhaps because longer trips may involve transfers where information about the arrival time of buses is critical). In Aspen, where commuters with up to one-hour rides constituted most of the riders surveyed, there was a strong interest in more comfortable on-board seating.
- Transit-riders-by-choice tended to be more interested in bus stop information, low floor buses, storage, and security cameras, than were "captive" riders.
- Women are much more concerned about security and convenience and are much more interested in bus stop lighting, security cameras, and driver courtesy. Low floor buses were much more important to women than to men.
- Higher income riders are no more willing to forego a fare reduction than are lower income riders.

The research shows that amenities promote transit ridership. In addition to foregoing a fare reduction, a high percentage of riders surveyed indicated that they would increase transit use if amenities were provided. Moreover, more *expensive* features are more likely to encourage transit riders to take more trips. For example, in Rochester, riders were least likely to trade fare reductions for amenities, but they were the most likely to express a willingness to ride more often if the amenities were added. This suggests that the people who would be willing to pay for amenities are not necessarily the same people who would increase their trip frequency. Based on our research, we estimate that spending at the 18-point level for amenities would increase ridership in the case study cities by about 1.5 to 3 percent.

Experience in the field with actual projects, however, shows that ridership gains (or reduction of ridership losses) are difficult to quantify as most transit agencies that implemented projects also undertook other projects (such as increased service) which impact ridership levels at the same time. *Many riders who requested amenities are already riding to capacity, however.* Therefore, one target market for amenities is choice riders who can be swayed to take more transit trips. One recent study agreed: "Infrequent riders are a critical transit market and perhaps the key to building transit ridership and revenues." [1]

1. Richard L. Oram and Stephen Stark, "Infrequent Riders: One Key to New Transit Ridership and Revenues", *Transportation Research Record* 52, p. 37.

PART 2

HOW TO USE THE TRANSIT DESIGN GAME

CHAPTER 3

DEVELOPING YOUR OWN CUSTOM SURVEY

The Transit Design Game can be customized to address the needs of any public transit system so that an agency can select features that address local issues. While the general survey used in five cities may be useful for broad comparisons with your situation, this Workbook provides you with the computer disk necessary to customize the survey form and analyze that survey.

This chapter describes a two-step process for developing your own custom survey:

1. The first step--Place Performance Evaluation--helps both **identify issues** and build a constituency for understanding the potential impact of amenities on riders and ridership.
2. The second step is to **select the features** you want to study in your survey. To help you in this process, we have included a detailed presentation of customer preferences and perspectives taken from our survey and focus groups, and organized according to the features we studied in the five case study cities.

Chapter 4 describes how to prepare the survey forms, administer the survey, and analyze the survey results.

Identifying the Issues: How to Look at a "Place"

Before developing any kind of customer survey, it is important to do a little field work and outreach, which include looking systematically and critically at bus stops and transit vehicles from the customer perspective. This information will help you understand how customers perceive and use existing facilities and how they think these facilities might be made more user-friendly and comfortable. Design features can then be tested in the Transit Design Game survey.

By spending time in an area, observing how people use it and asking the people who are there what they like or don't like, it is possible for just about anyone to experience firsthand how a place functions. This knowledge then becomes an important tool in determining how specific places can be improved.

The experience of looking at these spaces need not be onerous and can actually be fun as well as educational, especially if structured so as to involve teams of people in a creative way. In St. Louis, Missouri, for example, the transit agency used this approach in planning new light rail stations. By looking at existing stations as well as interviewing transit riders on the trains, community representatives and station planners found new insights into the positive and negative qualities of the existing stations, which will aid them in their planning efforts. They also found the experience entertaining!

What Is Place Performance Evaluation?

Place Performance Evaluation (PPE) is a place-oriented rather than project-oriented approach generally used by planners and other professionals in their work with communities. It requires the participants to use common sense and intuition along with structured observation and interview skills that allow them to very quickly see the good and bad qualities of a place. It seems to ignite a creative process about how to make a place a "great" place. Any group of observant people can do the evaluation, whether highly trained professionals or lay persons, with equally dramatic results achievable by both groups.

A small planning team working individually can do Place Performance Evaluation, but it also makes an excellent workshop. By participating in this process, participants not only get to know each other better but also learn to look more holistically at transit stops and vehicles, and to see their potential for acting as "places" in communities.

Structuring the PPE Observations

If structured as a workshop, this one-day exercise should begin with a visual exercise: a slide presentation of local places chosen by participants to illustrate both good qualities and bad qualities or a video presenting information on good and bad design. After the slide show or video, groups of 3 to 8 people spend the morning in an area of the city observing activities and informally interviewing people in the area. They should ride the bus to and from the area, noting passenger behavior and comfort on board.

During the morning observation period, the observation checklists are filled out, and one member of the group is designated to take Polaroid photos to communicate the group's findings. Each member of the group should interview transit passengers about the transit stop and the transit vehicle, as well. A sample evaluation form is provided as Exhibit 1. You can also test a draft of the Transit Design Game, just to see how riders react.

Exhibit 1. SAMPLE EVALUATION FORM

**TRANSIT VEHICLE AND STOP
EVALUATION WORKSHEET**

Location: _____

Please rate this transit stop and this vehicle according to the following qualities:

	GOOD	FAIR	POOR
TRANSIT STOP			
- General attractiveness			
- Clarity of information			
- Overall feeling of safety			
- Efficiency of loading and unloading			
- Comfort (e.g. shelter, lighting, seating)			
TRANSIT VEHICLE			
- General attractiveness			
- Clarity of information			
- Overall feeling of safety			
- Comfort of seats			
- Helpfulness/friendliness of the driver			

1. Would you use this transit service again? YES _____ NO _____
2. What is the most important improvement that you would make to:
 - the transit stop _____
 - the transit vehicle _____
3. Please ask a passenger to do the same rating above and describe the kinds of improvements s/he would most like to see.

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Reaching Consensus

After the observations, the participants return for a discussion of what each group found. People describe their findings using the Polaroid photos or slides of the observation areas for reference. The workshop attendees should then review a draft of the Transit Design Game and discuss which elements might be included and why. These observations and ideas should then be recorded in a short report that can be referenced when developing the Transit Design Game survey.

Selecting Features

To assist you in selecting transit features to test in the Transit Design Game, we provide a "Guide to Selecting Features" following Chapter 5, which describes in detail the *potential* customer preferences for the features included on the survey, based on our research in five cities. While your own situation will be unique, this will allow you to better understand how different kinds of customers might react to different kinds of amenity choices.

This guide is organized according to features found "At the Stop" and "On Board Vehicles." Included in each section is information about its impact on transit ridership, the types of riders that may be interested in that feature, and functional considerations that customers may be concerned about. Cost information for designing the Game is also provided.

In addition, we provide an overview of customer concerns about the *functionality* of different features. While these concerns will be less important to you as you develop the survey, they are critical to address in the project implementation phase. People react positively to amenities that directly enhance their transit experience and rate them more highly. In turn, providing an amenity that does not meet customer concerns significantly reduces its positive impact and may produce negative reactions. In Rochester, New York, for example, where some bus shelters were of inferior design, passengers not only rated them as less comfortable, convenient, and safe, but also felt that they were a waste of money. During focus groups, this led to negative views of the transit agency.

A Note on Survey Pricing Assumptions

The costs presented on the questionnaires are a fair reflection of the relative costs among the actual amenities. The rate is one point for every \$25,000 in annualized costs of the actual amenities. Sources for cost information were Nova Bus Company (for the buses) and Columbia Equipment Company for the amenities associated with shelters; other manufactures were consulted for security cameras, electronic information, bike racks, and the like. The assumptions include maintenance costs. We also assumed that bus stop amenities would apply only to the busiest 5% of bus stops, the rate currently used by the Massachusetts Bay Transportation Authority (in Boston). An interesting point was how inexpensive some of the amenities were, so that several (like driver courtesy, benches, and even low floor buses) were assigned a value of one point, even though they actually cost less. Finally, these assumptions do not include any revenue (such as advertising revenue) that could, for example, offset the costs of shelters.

For More Information

TCRP Report 22, "Guidelines for the Design and Location of Bus Stops", provides detailed information about the design and layout of bus shelters. In addition to information about other bus stop features, specific topics covered include

- Configuration and Orientation
- Advertising
- Developer Provided Shelters
- Artistic and Thematic Designs

CHAPTER 4

ADMINISTERING AND ANALYZING THE SURVEY

One key finding from the research in five cities was that riders in different cities had different perceptions about which amenities were most important, worth the cost, or most likely to induce added transit rides. Because of these differences, transit analysts may want to conduct their own surveys and analysis about the effect of amenities on their own transit riders.

The computer disk, which accompanies this report, provides a convenient way for transit agencies to administer the Transit Design Game to their own transit riders. The software allows the analyst to create survey forms that are specific to the particular needs and conditions of the analyst's transit system. It also facilitates data entry and data analysis.

System Requirements and Starting the Software

The software requires Microsoft Excel (at least Version 5.0), Windows 3.1 or Windows 95, and the program PKUNZIP, which is required to decompress a file. If you plan to use graphic images that were not part of the national survey (or if you want to amend the images used elsewhere), you will also have to have software, such as PowerPoint or PC-Paintbrush, that can create a PCX or BMP graphic image file. In terms of hardware, the program runs on a 486; a printer capable of printing on legal size paper is also helpful if you want to avoid having to cut and paste the survey. It would be very useful for the agency personnel involved in the survey to have a good working knowledge of the Microsoft Excel program (i.e., how to edit charts, text, and perform formatting) if they are going to make a substantial changes to the basic survey form.

Tip: Because of the graphics in the program, computers with less memory will run more slowly than more powerful ones. Ignore the "flashing" charts: it just means the computer is working.

To start using the software, you first use PKUNZIP to decompress the file. The graphic images of the amenities account for the large file size. Next, open Excel, and then within Excel, open the decompressed file, TDGAME.XLS. From here on in, the computer program will largely walk you through the steps for survey design, data entry, and data analysis.

Preparing the Survey Form

Select the Default Categories

After clicking on the button labeled "Design Form," you will see a screen that asks you to select the default categories. The 12 categories shown are those used in the surveys of riders in five cities conducted as part of our research. You would probably want to use the same categories, and you can add categories at a later step. One reason for dropping a category would be because of limited space on the survey form. Each category takes about a vertical inch of the survey form, and on legal size paper there is a practical limit of 12 or at the very most 14 categories. Thus, if you want to test several other types of amenities, you may have to drop one or more of the amenity categories used in the earlier, five-city surveys.

Tip: To drop a category, you must remove the check mark on the default category page, as you cannot drop it once you have the form on the screen itself.

However, if you change the categories, make sure that you still have a sufficient number of points to make the choice reasonable for users.

Tip: For the survey to offer respondents a real semblance of trade-offs, your total maximum number of points should not be less than 36 or more than 44.

When satisfied with the categories selected, click on the "OK" button.

Revise the Survey Form

After accepting the budget levels, you will see the survey form.

Tip: Even though the form says "18 points" you are actually editing both 12- and 18-point forms at the same time. By clicking on the first word of each line that mentions points, either 12 or 18, the full sentence will appear in the edit box at the top of the screen under the toolbar. Here, simply deleting one number and replacing it with another can change the point designation.

You should also see four control buttons on the right side of the form. If this is not visible on your monitor, set Excel's zoom control to 75% or smaller. The buttons allow you to add space for new categories of "on the bus" or "at the stop" amenities. To make changes to any of the text on the form, just go to the text you want to change and make the correction. To input a new graphic image created elsewhere, click on the cell where you want the new image to go, and use the Excel commands Insert and Picture to add it to the survey form. (See Exhibit 2 for information on how to insert a new category of features.)

Tip: Make sure that you type any new entries on the survey form so that the number of points lines up with the "0" in the no-frills category. This will affect the data analysis later, as the program will not read the entry if it is placed on the wrong line.

Exhibit 2. HOW TO INSERT A NEW CATEGORY

Transit agencies may want to test for passenger preferences in fare media or payment methods, ranging from simple fare payment technology (fareboxes that accept dollar bills) or more elaborate (fare cards). This can be accomplished by inserting a new category

1. *First, as part of your project planning, consider potential customer preferences so you understand better why you wish to test this feature. For example, the following riders might be interested in fare payment features:*

High-Frequency Riders. Regular and frequent transit passengers may prefer an expedited fare payment method, as this can reduce bus dwell times by speeding passenger boarding. In their study, Dwell Time Effects of the Low Floor Bus Design, Jonathan Levine and Gwo-Wei Torng (University of Michigan, 1992) report that, when coupled with other improvements, such as low floor bus design, eliminating the need for fare box transactions reduces dwell times significantly.

Lower Income Riders. Some fare payment media, such as fare cards, allow for free transfer between buses, bus and subway, and subway and bus, which reduces the costs to passengers, particularly those making multi-modal transfers. In addition, fare card technology allows a transit agency easily to set different fare schedules for different groups (e.g., students, seniors, those with disabilities or low income) or to charge more for peak or infrequent travel or on long-distance routes. With fare card technology, a transit agency can serve both low-income and frequent riders and attract infrequent riders to a system by offering discounts for multiple trips or off-peak transport.

2. *Consider potential passenger functional concerns. While not of immediate interest in creating the survey, these issues will be important later on. For example the ease with which passengers can use a fare technology may affect whether or not they will use it.* Informational posters, step-by-step instructions on the card dispensers or fare boxes themselves, and helpful, courteous drivers are essential from the beginning. A fare payment medium may not be fully adopted by the riding public until it is available on or accepted by the majority of vehicles along at least the most heavily traveled routes. Also, the technology must be perceived as reliable. If fare card machines break down or the card readers are inefficient, riders may quickly return to hard cash or token payment options.

3. *Develop your price structure:* An important element of the survey design is that respondents "trade-off" amenities based on representations of each amenity's true cost. This approach allows for the testing of increasingly deluxe and expensive to acquire and maintain levels of certain amenity categories and highlights the fact that, for example, shelters with heaters are not an even trade for package racks. Attaining this degree of realism requires that the analyst designing the survey give some care to setting the points for each level of each amenity. For the amenities defined in the basic survey (the one used in the Federal research), the points represent about \$25,000 per year in costs of installation and maintenance when evaluated over the life of the amenity.

For example, we calculated the bus shelter with walls (the second level in the weather protection category) to be worth 4 points by using the following equation: \$10,000 per shelter to install and maintain over the lifetime of the shelter multiplied by 250 stops where the system would install this type of shelter (this assumes that the top 5 percent of a transit system with 5000 stops would merit this level of shelter) divided by 25 years (the expected life of the shelter) = \$100,000 per year for the amenity. As each point is worth \$25,000 per year, the final cost on the survey is 100,000/25,000 or 4 points.

There are, however, some features that may not be appropriate for testing using the Transit Design Game. For example, testing such features as compressed natural gas buses may not be feasible as the cost of these buses is beyond either a 12 or 18-point range (the equivalent would be approximately 30 points) and would therefore skew the survey. It is doubtful that someone would put all of their points on one feature, which they would have to do to "buy" a CNG bus. Therefore, the value of this feature to passengers would not be accurately gauged by this survey.

Be sure to review the introductory text for the survey cover that appears at the bottom of the screen. You may want to add a graphic of the system logo or text that identifies your transit system. The text of the demo and transit usage questions on the back of the survey form should remain the same.

Tip: The text on the introduction to the game does not automatically justify. You will have to manually indicate where you want a line of text to end just as you would with a typewriter.

When the survey looks right, click on the button to print the form. You will see a print preview of each form design. This allows you to make adjustments to the margins and select other print set-up conditions. When you are satisfied with the look of the forms, you can print the document. The program will automatically send to your printer the legal-sized pages appropriate for each budget level selected. Use a copy machine to print the survey, double-sided, on heavyweight stock.

Tip: When the survey has the layout and design that you want, save the Excel file under a new name.

Note: At present, the survey design has some formatting limitations, which restrict the number of features you can test for and the number of new features you can add. Since the page dimensions do not expand beyond the current one-page layout, you may "add" features by substitution, first removing an existing feature and then replacing it with the desired new feature. If you want to add more features than the current layout allows, you may have to redesign the survey to accommodate all of the features desired.

If you have difficulties with printing and formatting, and you haven't made a lot of changes to the survey, it is sometimes easier to exit the file and start over.

Exhibit 3 presents a reduced version of the default survey (i.e., the survey you will print if you make no changes).

Exhibit 3. SAMPLE 12 AND 18-POINT SURVEY FORMS (REDUCED IN SIZE) WITHOUT CHANGES

Transit Design Game

Hello! We want your opinion about the transit features that are most important to you as a passenger both on the bus and at your bus stops.

Imagine you are designing a bus system from scratch.

You have 12 "points" that you can use to buy the features listed inside. Which would you choose? There are several categories for each item ranging from basic to deluxe.

(Please do not spend more than 12 points)

Your answers will help us in our research but will not negatively affect your current transit service.

Route Number _____

Front Cover

If your transit system had the features you selected on the previous page, how would this affect your decision to use transit?

I would not change my transit riding habits.

I probably would ride transit more.

I definitely would ride transit more.

Now imagine that instead of buying the transit features you selected, you can use some or all of your Points as reducing the fare. Instead, which option would you choose?

Buy only "no miles" (0 point) features; spend all 12 Points on reducing the fare by 10 cents.

Spend only 6 Points on added features; spend 6 Points on reducing the fare by 5 cents.

Spend 12 Points on added features; spend 0 Points on reducing the fare.

Finally, Please tell us about yourself

1. How many one-way transit trips do you usually take each week? _____ Trips

2. How long do you usually have to wait for the bus at this stop? _____ Minutes

3. How long is your usual bus trip? _____ Minutes

Why did you choose to take the bus for this trip?

It is the only way I could have gotten where I want to go.

I could have traveled by some other means, but I prefer to use the bus.

Are you

Male Female

Which of the following best describes your family income per year

Under \$20,000 \$20,000 to \$29,999 \$30,000 to \$39,999 \$40,000 or more

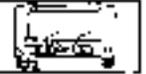
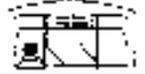
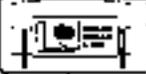
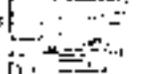
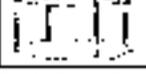
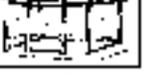
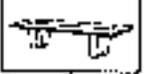
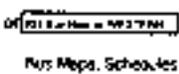
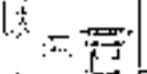
Are you

Under 65 65 or over

Thank you for completing our survey.

Back Cover

Exhibit 3. continued.

Write the number of Points you would spend on each category. Remember, the total number of points cannot exceed 12.					
	No Frills	Added Transit Features			Points
On the Bus					
Storage Space	No Storage Facilities 0 Points	or  Package Rack 1 Point	or  Bike Rack 3 Points	or Pockets and Back Packs 4 Points	Points
On-board Information	No On-board Information 0 Points	or Route Map and Schedule 1 Point	or  Electronic Display 5 Points		Points
Ride Quality	Standard Transit Bus 0 Points	or Quiet and Smoother Ride 8 Points			Points
Courtesy-trained Drivers	Standard Driver Training 0 Points	or  Added Courtesy Training 1 Point			Points
Seating	Unpadded Seating 0 Points	or  Some Padding 2 Points	or  Fully Cushioned 6 Points	or  Head and Arm Rests 8 Points	Points
Security Camera	No Security Camera on Bus 0 Points	or  Security Camera on Bus 3 Points			Points
Accessibility	Bus with Steps and Wheelchair Lift 0 Points	or "Low Floor" Bus (no need for lift or steps) 1 Point 			Points
At the Stop (Map Bus Stop Only)					
Weather Protection	No Shelter 0 Points	or  Simple Shelter: Roof, No Walls 1 Point	or  Improved Shelter: Roof and Walls 4 Points	or  Improved Shelter With Hanging Mat 5 Points	Points
Bus Stop Seating	No Bus Stop Seating 0 Points	or  Standard Bench 1 Point	or  Deluxe Bench 2 Points		Points
Bus Stop Information	No Bus Stop Information 0 Points	or  Bus Maps and Schedules 1 Point	or  Bus Maps, Schedules and Electronic Stop Reports 4 Points		Points
Bus Stop Lighting	Standard Street Lights 0 Points	or Special Bus Stop Lighting 1 Point 			Points
Other Bus Stop Features	No Added Features 0 Points	or Phone, Trash Bin and Newspaper Vending 2 Points 			Points
TOTAL amount spent should not exceed 12 points					Points

Inside Fold

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Exhibit 3. continued.

Transit Design Game

Hello! We want your opinion about the transit features that are most important to you as a passenger both on the bus and at your bus stops.

Imagine you are designing a bus system from scratch.

You have 18 "points" that you can use to buy the features listed inside. Which would you choose? There are several categories for each item ranging from basic to deluxe.

(Please do not spend more than 18 points)

Your answers will help us in our research but will not negatively affect your current transit service.

Route Number _____

Front Cover

If your transit system had the features you selected on the previous page, how would this affect your decision to use transit?

I would not change my transit riding habits.

I probably would ride transit more.

I definitely would ride transit more.

Now imagine that instead of buying the transit features you selected, you can use some or all of your Points on reducing the fare instead. Which option would you choose?

Buy only "no frills" (0 point) features, spend all 18 Points on reducing the fare by 15 cents

Spend only 6 Points on added features, spend 12 Points on reducing the fare by 10 cents

Spend 12 Points on added features, spend 6 Points on reducing the fare by 5 cents

Spend 18 Points on added features, spend 0 Points on reducing the fare.

Finally, Please tell us about yourself

1. How many one-way transit trips do you usually take each week? _____ Trips

2. How long do you usually have to wait for the bus at this stop? _____ Minutes

3. How long is your usual bus trip? _____ Minutes

Why did you choose to take the bus for this trip?

It is the only way I could have gotten where I want to go

I could have traveled by some other means, but I prefer to use the bus.

Are you

Male Female

Which of the following best describes your family income per year

Under \$20,000 \$20,000 to \$29,999 \$30,000 to \$39,999 \$40,000 or more

Are you

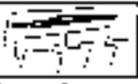
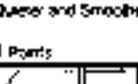
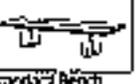
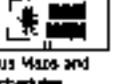
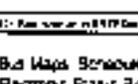
Under 65 65 or over

Thank you for completing our survey.

Back Cover

Exhibit 3. continued.

Write the number of Points you would spend on each category.
Remember, the total number of points cannot exceed 18.

	No Frills	Added Transit Features			Points
On the Bus					
Storage Space	No Storage Features 0 Points	or  Luggage Rack 1 Point	or  Bike Rack 3 Points	or  Package and Bike Racks 4 Points	Points
On-board Information	No On-board Information 0 Points	or  Route Map and Schedule 1 Point	or  Electronic Display 5 Points		Points
Ride Quality	Standard Typical Bus 0 Points	or  Quieter and Smoother Ride 8 Points			Points
Courtesy-trained Drivers	Standard Over Training 0 Points	or  Added Courtesy Training 4 Points			Points
Seating	Unpadded Seating 0 Points	or  Some Padding 2 Points	or  Fully Cushioned 5 Points	or  Head and Arm Rests 6 Points	Points
Security Camera	No Security Camera on Bus 0 Points	or  Security Camera on Bus 3 Points			Points
Accessibility	Bus with Steps and Wheelchair Lift 0 Points	or  Low Floor Bus (no need for lift or steps) 1 Point			Points
At the Stop					
Weather Protection	No Shelter 0 Points	or  Simple Shelter: Roof, No Walls 1 Point	or  Improved Shelter: Roof and Walls 4 Points	or  Improved Shelter With Heating 5 Points	Points
Bus Stop Seating	No Bus Stop Seating 0 Points	or  Standard Bench 1 Point	or  Deluxe Bench 2 Points		Points
Bus Stop Information	No Bus Stop Information 0 Points	or  Bus Maps and Schedules 1 Point	or  Bus Maps, Schedules and Electronic Status Reports 4 Points		Points
Bus Stop Lighting	Standard Street Light 0 Points	or  Special Bus Stop Lighting 1 Point			Points
Other Bus Stop Features	No Added Features 0 Points	or  Phone, Trash Bin and Newspaper Vendor 2 Points			Points
TOTAL amount spent should not exceed 18 points					Points

(Please Continue on Back Page) →

Inside Fold

Administering the Survey

Transit Design Game questionnaires should be distributed on board the buses. You should select a series of routes that reflect the city's demographic characteristics to ensure as balanced a sample as possible. (See Sample Size below) The Game should be administered during off-peak as well as peak hours, although the latter is complicated if buses become extremely crowded. In this case, "shoulder" periods immediately prior to and after the peak hour should be used to survey passengers.

Survey administrators should board a bus and ask every rider if s/he wishes to fill out a survey. (See instructions that follow.) If necessary, effort should be made to help people fill out the survey correctly and to check results, as the form may not be completely self-explanatory. The survey person should ride the line for a complete run and repeat the trip or board a different line.

Sample Size

Determining the number of surveys you need to collect depends on the number of groups that you explicitly want the data to represent and on the desired degree of confidence that your actual averages fall within a certain range of your sample averages. There are ways to determine this statistically for any given set of parameters. However, there are two simple rules to keep in mind when setting the sample size: (1) more completed surveys tend to yield better information about the population as a whole; and (2) more completed surveys cost more money and time to administer and process. In each of the five cities that we studied, we sought to obtain 70 completed surveys for each of the 12-point and 18-point budgets. This is a minimum sample number.

Also keep in mind that a high number of unusable surveys may compromise the representativeness of the sample. You should caution surveyors to help people as much as possible and to check forms as they are completed. There is no need to check each survey prior to coding. The data entry step in the software will examine each record to ensure that survey responses are within acceptable ranges.

Instructions for Survey Distribution

It takes passengers 10-15 minutes to complete the conjoint survey front and back correctly. Filling out the survey requires some concentration, so it's important not to pressure people into completing the survey if they are not interested in doing so.

The key, then, is to get capture people's interest by explaining at the outset that the survey is like a game. We've found that people like this survey and enjoy filling it out, so present it as a fun way to pass the time. Once you have their attention, there are a few things you must emphasize.

- Start by introducing yourself and the survey in whatever way you are most comfortable. You may use your name or the name of the agency. A clear introduction speeds up the surveying process and avoids confusion.

- When you first board the bus, ask the driver for permission to distribute the survey, and then ask people, individually or as a group, if they are interested in playing a game that is part of a national survey.
- Hand the survey to people and point out that the front page includes some important instructions. Ask people to read the instructions first, and then explain to them that they need to pretend that they are designing a bus system from scratch. They are not simply adding features to what they already have in their city.
- Give your passengers an example. Open the survey and indicate the gray column: this is what they are starting with. They need to buy back the features they want and add any others they can afford with their points. If they like low floor buses, they need to spend 1 point to get them. If they would like bike racks but don't have them, they need to buy those racks for 3 points. (Use this opportunity to remind people that they need to use the points listed under each feature, not just make up their own numbers.)
- Finally, remind people that they cannot spend more than the points allotted, and remind them to total up the points column and to fill out the back of the survey. People often forget to fill out the back even when requested to do so, so check the back side and return it to the passenger who provided it to you to finish if necessary. The survey is no use if it is incomplete.

A few more tips:

- It is much easier to explain the survey to a group of people rather than one person at a time. Starting at the back of the bus works well. People may be grouped there and 5 or 6 people can hear your explanation at once. Don't be shy about approaching a group. If you present the survey as a fun way to spend the bus ride, most people will want to participate. Also, other people on the bus will hear about the survey and ask for one. Be sure to explain the instructions carefully to everyone who fills out a survey.
- Try to alternate between 12- and 18-point surveys often to ensure that you get a diverse range of riders completing each. Take a break from time to time to separate surveys that are incorrect, and use those "problem surveys" to see what you need to emphasize with the next round of passengers. Keep track of how many more surveys you need to distribute.
- Friendliness and smiles go a long way. Please be very friendly and helpful, and thank people for their time.

Data Entry

When the survey is complete, you can use the TDGAME software to enter and analyze the data. To do this, open the file you saved at the end of the Survey Design stage, and click on the DATA ENTRY button. The layout of the data entry template follows the natural flow of the survey itself: first enter the total points, then the route number (from the front of the survey); then enter the points assigned to each category (from the inside of the survey); and then the responses to each of the demographic and usage questions (from the back of the survey). If the number of points selected in a category is "0", you can leave the box empty. After you have typed in a number (or left it blank), press return/enter on the keyboard and you will automatically go to the next line.

On the reverse part of the survey, enter "1" if someone checked the first answer, "2" if someone checked the second answer, and so on. For the question that asks about the number of one-way trips and the length of the wait or ride, enter the *actual* number (e.g., 10 trips, 12 minutes, etc.).

After entering the survey questions, press the button labeled "Next Survey Form".

While entering the data, if after you click on "Next Survey Form," the computer beeps and shows you the same record, there is at least one of the amenity categories that has an unacceptable point value. Check the survey carefully to see that you have entered the data correctly, and make any changes. When you click "Next Survey Form" again, the program will accept *all* values, correctly or incorrectly entered.

Tip: Double-Check each entry before going to the next form!

If part way through the data entry stage, you break for lunch, you can save the file. When you return from your meal, you can re-open the file, and the data you entered so far will still be there. A counter on the top of the data entry form tells the number of records entered so far.

If for any reason you want to make a correction to data already entered, you can see the data in a continuous column beginning in cell A1 of the "Output" worksheet. Although the entries are in the order in which you input them, the column is a continuous row of numbers and it make take some work to figure out which item you need to change.

Data Analysis

The data analysis function is largely automatic. Press the button marked, appropriately, "Data Analysis," and the dialog box to Define the Scope of Analysis will appear. You will probably want to begin the analysis by examining all records. Click on the "ALL records" button, and then click on "OK" to start the procedure. If you want a more detailed analysis, you should save the RESULTS sheets and the charts in a file.

Tip: If in the data analysis, you get a message reading "overflow," this means that there are no records that meet the constraints of your selected data set. For example, if you have encoded all of

your 12-point surveys, but none of your 18-point surveys, you will get an "overflow" reading. Return to the "Dbox 1" and redefine your selected data set.

Tip: To print your results, you will have to block the table you want to print, and then print "selection".

The results of the data analysis step are in the worksheet, "ALL.RECS" (see tab at bottom of the screen.) There are also five tables, and three excel charts that graphically describe the data.

The analysis results include the following:

- Summary of record status (total surveys, those not acceptable and the reason, number of forms accepted for analysis);
- Average points spent per category (in tabular and chart form for each budget level);
- Percent of respondents buying each level of amenity (in tabular and chart form for each budget level);
- A ranking of the amenities by their ability to induce transit rides; and,
- A ranking of the percentage of respondents willing to forego a commensurate fare reduction.

Tip: The results (including charts) can be viewed by clicking on the different tabs at the bottom of the computer screen. Each chart can then be printed.

If you want to analyze the data according to specific demographic or ridership patterns, go back to the dialog box (the Dbox 1 tab at the bottom of the screen), define new selection criteria, and rerun the analysis procedures. For example, if you want to know how only high frequency (say more than 10 trips per week) male riders view the amenities, you would click on the button "Analyze SELECTED Records," and set the trip frequency minimum to 11 and the sex maximum to 1 (which means that "2" or women would not be analyzed). If you want to keep the results, save it to a new file or print it out, because the next time you run the data, it will override previous results.

Tip: The default range is set at "1" for minimum and "1000" for maximum as a matter of convenience for the program.

The results of this analysis are largely self-explanatory. However, you should compare this information with the results of the focus groups (see Chapter 5). In addition, this information can be quickly compared with the results obtained in the five-city study (see Appendix), but may vary, especially if you have changed the types of features studied. Finally, the handbook, which accompanies this workbook -- *Amenities For Transit Handbook* -- provides very useful information about implementing an amenities program.

CHAPTER 5

USING THE TRANSIT DESIGN GAME TO CONDUCT FOCUS GROUPS

The Transit Design Game also provides an excellent format for a focus group of transit passengers. As can be seen from the extensive quotes in Chapter 3, customer perceptions can add some important qualitative information to the quantitative survey results. Of course, focus groups are not statistical surveys and are subject to bias based on group dynamics. Still, they provide a relatively quick and vivid way for a transit agency to hear from customers.

The Transit Design Game Focus Group has three parts: the first and third parts use the survey itself, and the second part involves testing and discussing various local amenities and features. You will have to develop the second part yourself by taking slides of these features. The focus group can use a draft (or test) survey for the Transit Design Game or can use the final survey.

General Instructions

Focus group participants should be familiar enough with the transit system to be able to speak with some experience about it. A variety of passenger types should be selected, if possible, including infrequent riders, commuters, and passengers who are elderly or have disabilities. Participants should, insofar as possible, also reflect the demographic make-up of system ridership. You can either mix different types of passengers together or break them into different user groups. The latter approach has the advantage of having like-minded individuals focusing on the discussion, while mixing groups will create a more diverse discussion.

It is up to you to determine the maximum number of focus groups you conduct, but at minimum, two and preferably three groups should be organized. The number of groups will depend on how segmented your selection is for the groups. If you want several groups of different types of passengers, you may have to do more focus groups than if you do mixed groups.

Participants can be invited in a number of ways. For example, staff can go to a transit facility, like a bus transfer or train station, and recruit participants. Many transit agencies keep a list of passengers just for the purpose of customer focus groups. Local organizations or firms with high percentages of transit users can be solicited to select a group of members or staff to join a workshop.

Participants in the focus group must be pre-screened to make sure that they conform to the desired demographic mix of the focus group. A screening form, invitation, and follow-up letter are provided as Exhibits 4 and 5.

It is customary to offer focus group participants some sort of remuneration, either financial or transit tickets or tokens in lieu of money. It is best to determine which form of payment participants will want well before the date of the focus group. Providing a meal or snack is also an effective way of encouraging people to participate.

Invite more people than you think you will need. In general, the focus group should have between 12-15 people, but some people will not show up even though they have confirmed. Always invite a few more people than you think you will need.

Schedule the focus groups at a time and location when it will be most convenient for participants. For example, downtown office workers may be able to do a lunch focus group or one at 5:30 p.m., while low-income residents or those working a distance from the workshop site may find an evening time preferable. The meeting rooms of local neighborhood associations, downtown agencies or even a room in the transit agency itself are appropriate (and low-cost) options. Inform the facilities people of all audio-visual needs well in advance.

Ask people to arrive about 15 minutes before you want the group to start. This will allow time to sign in and to pick up a snack or buffet meal. You should have everyone sign in with their name, address, and telephone number and provide them with pencils and a name card upon which to write their first name, so you can call on them individually. It is helpful to have two people running these groups so that the facilitator can devote his or her attention to running the group and not be distracted by logistical matters.

The focus group should be audio taped, at minimum, so that comments can be transcribed; video taping is also possible. We conducted the focus groups for this study in normal conference rooms, but special rooms set up for observing the focus groups can also be used.

A script for the focus groups -- divided into three parts -- is provided as Exhibit 6. In order to make sure that the topic is adequately covered, it is important for the facilitator to keep to the prepared script. The facilitator should be trained and experienced in moderating focus groups.

At the end of the focus group, you should hand out the cash payment, transit pass, etc., in an envelope and check off names of participants who have been paid.

Analyzing the Results

After completing the focus groups, you will have audio or videotapes as well as the completed survey forms. The forms can be included in your overall sample if you wish. However, do not use the corrected responses that are requested at the end of the focus group. These responses are useful to examine because they indicate how responses have changed based on the discussion, which can influence choices by providing participants with more information. In focus groups conducted in the test cities, for example, many respondents declined to "buy" low-floor buses at

first because they were unfamiliar with them when initially completing the survey. At minimum, the focus group comments should be transcribed and organized by type of feature or by local project. Separate lists should be made from each group so that responses can be compared.

Exhibit 4. SAMPLE SCREENING FORM/INVITATION FOR FOCUS GROUPS

Hello! I am representing a consumer research organization that is conducting a focus group regarding transit design features. We will be discussing the kinds of amenities that are most important to you as a passenger, both at your transit stops and on the transit vehicles you ride.

This discussion will be held on () at (), from () too ().

This is a research project, NOT a sales meeting. We will offer you a transit pass (or \$25.00) for your participation. We will also provide you with refreshments. Will you join us?

Because we need to involve people with diverse backgrounds and experiences, we need to ask you a few questions:

1. *Are you a regular transit rider?*
2. *How long have you been riding the bus?*
3. *What is your age? 18-35 36-50 51-65 Over 65*
4. *What is your occupation:*
 - a. Professional*
 - b. Manager or Administrator*
 - c. Technician*
 - d. Student*
 - e. Homemaker*
 - f. Currently unemployed*
 - g. Retired*
 - h. Other _____*
5. *Where do you live? zip code _____*

[Add other screening questions as desired]

We also need your phone and/or fax number so we can confirm your participation. Because only a small number of people are invited, we need to be able to count on your participation. Your attendance is vital to the success of the project. Please RSVP to let us know whether or not you can attend the discussion. Please phone (name and phone number of contact person).

We look forward to seeing you on (date). Please arrive 15 minutes before the meeting time so you can register. Thank you for your help!

Exhibit 5. FOCUS GROUP FOLLOW-UP LETTER

Dear Sir/Madam:

On [date], we sent you an invitation to participate in a Focus Group Discussion regarding Transit Design Features that are important to transit passengers on the bus and at bus stops.

This discussion will be held on (repeat date, time and location).

As the date approaches, we have not yet heard from you as to whether or not you are able to participate. Remember, we are offering you the choice of receiving \$25 in cash or the price equivalent in a transit pass for your participation. We will also provide you with refreshments. Will you join us?

Your attendance is vital to the success of the project. Please RSVP to let us know whether or not you can attend the discussion. Please phone (repeat name and phone number of contact person) before (give a deadline).

We look forward to seeing you on the (date). Please try to arrive 15 minutes before the meeting time so you can register. Thank you for your help!

Sincerely,

Exhibit 6. FOCUS GROUP SCRIPT

The following is a script for the focus groups and an approximate timetable. Parts I and III use the Transit Design Game form you have already developed. Part II requires using photos of projects from your city as well as others.

Introduction (10 min.)

Thank you for coming.

My name is _____ and I am a moderator for a study about design features transit riders would like at transit stops or in transit vehicles and what people think about the features that have been provided here in (city). Before we get started, I'd like to go over a few details.

First, we will be tape [or video] recording this session, but the tape will not be broadcast and is for our internal use only. Because we are tape recording the session, we would like one person to speak at a time, and that we ask there to be no side conversations.

We really are interested in your opinions, and we want to encourage you to say what you think. We could have talked individually to you, but we wanted to have a discussion where other people's ideas might stimulate your own. There are no right or wrong answers.

Let me also say that I am here today as a moderator, not an expert, and I will be facilitating the discussion. I have a number of questions to ask and, to keep to the schedule, I may have to cut some people off. Please don't think I'm being rude, but we must keep to a schedule.

Now let's go around the table and introduce ourselves. Please give us your first name and say a few words about how long you have been riding transit in this city, what routes or buses you take most often, what you like about the transit system generally and what you think needs to be improved. [Ed. Note: While this clearly is not the purpose of the focus group session, we found that is more effective to let those participants with grievances air them at the start of the session in order to enable the group to get on with the business at hand. Grievances expressed should not be responded to by the facilitator, but rather listened to and considered to be part of the person's self-introduction.]

(Introductions)

Part I (45 minutes.)

The first thing we'd like you to do in this focus group is to fill out a short survey about design features for bus stops and bus vehicles. Please let me know if you have any questions, but don't reveal what your answers might be.

Exhibit 6. continued.

(Hand out Transit Design Game. This also gives participants a chance to finish their meal.)

Now, let's talk about what your answers are. (Addressing Person A): Tell us what features you selected and what your reasons were for your choices. (After answering): Did you decide to reduce the fare or keep the features you selected? What was your reason?

[Probe other people: skip around the table; acknowledge people who look like they are ready to talk or are volunteering; if no one volunteers, call on someone]

Follow-up questions could include:

1) Person A said....., did anyone vote for [another option]?

OR

2) Who has a response that is very different?

OR

3) (Addressing Person B): Tell us what features you selected and how you would use those features.

4) Did anyone select a feature that no one has talked about yet?

[Note: Probe reasons people think features are or are not really important, or debate which ones are important. It is helpful to keep a checklist of features you have discussed, so you can make sure you cover all the categories.]

(After answering): Did you decide to reduce the fare or keep the features you selected? What was your reason?

Now let me ask a general question: How important do you think these features are for transit riders?

Part II (20 - 30 min.)

[Note: This section should be geared to your own local projects. Show slides of local sites if possible. It is best to show no more than 3 or 4 examples. You can show them all at once and turn the lights on, or you can show one at a time and keep the lights on dim. If you are testing new features, you might have to rely on drawings or a manufacturer's catalogue.]

Now I'm going to show you some slides of the (project) here in (city).

(Show slides.....)

Exhibit 6. continued.

What's good about this project? What works? What do you like about it? How well does it serve passengers?

What doesn't work?

Does this project play a role in your decision whether or not to ride transit?

For unbuilt projects:

Do you think that this project will serve the needs of transit passengers? What you like about it? What do you dislike? What issues should the transit agency consider before it provides the project/feature?

Part III (10 min.)

Now that we've had this discussion, would anyone like to change his or her opinion on answers given on the survey?

(Hand out red pencils)

If so, please mark any changes in red.

THANK YOU VERY MUCH!