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# **TCRP Report 50**

## **A Handbook of Proven Marketing Strategies for Public Transit**

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# Report 50

## A Handbook of Proven Marketing Strategies for Public Transit

TEXAS TRANSPORTATION INSTITUTE  
College Station, TX

SOUTH WEST TRANSIT ASSOCIATION  
San Antonio, TX

and

UNIVERSITY OF WISCONSIN-MILWAUKEE  
Milwaukee, WI

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## TRANSIT COOPERATIVE RESEARCH PROGRAM

The nation's growth and the need to meet mobility, environmental, and energy objectives place demands on public transit systems. Current systems, some of which are old and in need of upgrading, must expand service area, increase service frequency, and improve efficiency to serve these demands. Research is necessary to solve operating problems, to adapt appropriate new technologies from other industries, and to introduce innovations into the transit industry. The Transit Cooperative Research Program (TCRP) serves as one of the principal means by which the transit industry can develop innovative near-term solutions to meet demands placed on it.

The need for TCRP was originally identified in *TRB Special Report 213—Research for Public Transit: New Directions*, published in 1987 and based on a study sponsored by the Urban Mass Transportation Administration—now the Federal Transit Administration (FTA). A report by the American Public Transit Association (APTA), *Transportation 2000*, also recognized the need for local, problem-solving research. TCRP, modeled after the longstanding and successful National Cooperative Highway Research Program, undertakes research and other technical activities in response to the needs of transit service providers. The scope of TCRP includes a variety of transit research fields including planning, service configuration, equipment, facilities, operations, human resources, maintenance, policy, and administrative practices.

TCRP was established under FTA sponsorship in July 1992. Proposed by the U.S. Department of Transportation, TCRP was authorized as part of the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA). On May 13, 1992, a memorandum agreement outlining TCRP operating procedures was executed by the three cooperating organizations: FTA, the National Academy of Sciences, acting through the Transportation Research Board (TRB); and the Transit Development Corporation, Inc. (TDC), a nonprofit educational and research organization established by APTA. TDC is responsible for forming the independent governing board, designated as the TCRP Oversight and Project Selection (TOPS) Committee.

Research problem statements for TCRP are solicited periodically but may be submitted to TRB by anyone at any time. It is the responsibility of the TOPS Committee to formulate the research program by identifying the highest priority projects. As part of the evaluation, the TOPS Committee defines funding levels and expected products.

Once selected, each project is assigned to an expert panel, appointed by the Transportation Research Board. The panels prepare project statements (requests for proposals), select contractors, and provide technical guidance and counsel throughout the life of the project. The process for developing research problem statements and selecting research agencies has been used by TRB in managing cooperative research programs since 1962. As in other TRB activities, TCRP project panels serve voluntarily without compensation.

Because research cannot have the desired impact if products fail to reach the intended audience, special emphasis is placed on disseminating TCRP results to the intended end users of the research: transit agencies, service providers, and suppliers. TRB provides a series of research reports, syntheses of transit practice, and other supporting material developed by TCRP research. APTA will arrange for workshops, training aids, field visits, and other activities to ensure that results are implemented by urban and rural transit industry practitioners.

The TCRP provides a forum where transit agencies can cooperatively address common operational problems. The TCRP results support and complement other ongoing transit research and training programs.

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### NOTICE

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The members of the technical advisory panel selected to monitor this project and to review this report were chosen for recognized scholarly competence and with due consideration for the balance of disciplines appropriate to the project. The opinions and conclusions expressed or implied are those of the research agency that performed the research, and while they have been accepted as appropriate by the technical panel, they are not necessarily those of the Transportation Research Board, the National Research Council, the Transit Development Corporation, or the Federal Transit Administration of the U.S. Department of Transportation.

Each report is reviewed and accepted for publication by the technical panel according to procedures established and monitored by the Transportation Research Board Executive Committee and the Governing Board of the National Research Council.

To save time and money in disseminating the research findings, the report is essentially the original text as submitted by the research agency. This report has not been edited by TRB.

### Special Notice

The Transportation Research Board, the National Research Council, the Transit Development Corporation, and the Federal Transit Administration (sponsor of the Transit Cooperative Research Program) do not endorse products or manufacturers. Trade or manufacturers' names appear herein solely because they are considered essential to the clarity and completeness of the project reporting.

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## **FOREWORD**

*By Staff  
Transportation Research  
Board*

This report identifies, describes, and assesses proven low-cost and cost-effective marketing techniques and strategies appropriate for use in the transit industry. This is a "how-to" handbook for selecting and implementing such techniques at transit agencies. The target audience is transit marketing professionals, public transit managers, and executives who have responsibilities for marketing transit systems.

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Marketing plays a critical role in assisting transit agencies in attracting new riders, retaining existing ones, and ensuring support from the community at-large. To maximize its effectiveness, marketing must be viewed as a comprehensive process through which transit agencies develop and provide transit service and communicate the benefits to their employees, patrons, and the general public. Marketing techniques that are both low-cost and cost-effective are needed by transit agencies and may be crucial to their viability. Transit agencies currently use a variety of low-cost techniques. Thus, there is a need to identify, assess, and share the proven strategies so that they may be adopted throughout the transit industry.

Texas Transportation Institute, in association with the South West Transit Association and the Center for Transportation Education and Development at the University of Wisconsin-Milwaukee, prepared the handbook for TCRP Project B-13. To achieve the project objective of identifying proven marketing strategies to implement at transit agencies, the researchers identified and described low-cost and cost-effective marketing techniques currently used at large, medium, and small, urban and rural transit agencies throughout the transit industry. The complete range of low-cost marketing activities includes traditional, broad marketing activities such as pricing, promotions, advertising, planning, and service delivery targeted at specific submarkets. Further, a method was developed to define the criteria that would be used to assess and select creative and promising marketing techniques. Selection of promising practices was made on the basis of cost, cost-effectiveness, ease of implementation, community support, and staff time required to implement the marketing program. A general overview of each strategy is provided. The overview includes a basic description of the strategies, the objective of its implementation, the resources necessary, the time required, the results of the project, any suggested adaptation or refinements, and when the project was implemented. The size of the transit agency implementing the project is indicated by fleet size.

Also provided in this handbook are summary materials on general principles of marketing public transit. Included are checklists and forms to make it easier for the public transit manager to incorporate solid principles of marketing and public relations.

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## **COOPERATIVE RESEARCH PROGRAMS STAFF**

ROBERT J. REILLY, *Director, Cooperative Research Programs*  
STEPHEN J. ANDRLE, *Manager, Transit Cooperative Research Program*  
GWEN CHISHOLM, *Senior Program Officer*  
EILEEN P. DELANEY, *Managing Editor*  
JAMIE M. FEAR, *Associate Editor*

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DARREL M. FEASEL, *Virginia Department of Rail and Public Transportation*  
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JUDY A. PERKINS, *University of New Orleans*  
ANITA A. WASIUTA, *British Columbia Transit, Victoria, Canada*  
CHARLES T. MORISON, *FTA Liaison Representative*  
PETER SHAW, *TRB Liaison Representative*

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This work was sponsored by the Federal Transit Administration and conducted in the Transit Cooperative Research Program, which is administered by the Transportation Research Board of the National Research Council.

The research performed and the development of this "how-to" document were performed under TCRP Project B-13 by the Texas Transportation Institute (TTI)/Texas A&M Research Foundation (TAMRF), South West Transit Association (SWTA), and the Center for Transportation Education and Development (CTED) at the University of Wisconsin-Milwaukee (UWM). The Texas A&M Research

Foundation served as the contractor for the study while the work undertaken by SWTA and UWM was performed under a subcontract with TAMRF.

TTI's Ms. Cinde Weatherby, an associate research scientist, was the principal investigator and performed general supervision of the project. Major assistance in the drafting of the "how-to" document was performed by Mr. Todd Carlson, a TTI research associate. Other key staff working on the project were SWTA Executive Director Carol Ketcherside and Mr. David Cyra, former executive director of the UWM's CTED and principal of Cyra Engineering Transportation Training Consulting. Graphics design development and document formatting was performed by Ms. Debbie Murillo, TTI commercial artist. Additional support was provided by other TTI staff members; Ms. Kelly West, associate research editor, Mr. Mark Anthony Posada, research associate, Ms. Michelle Walker, assistant research editor, and Mr. Bernie Fette, assistant head, Information and Technology Exchange Center.

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# INTRODUCTION

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INTRODUCTION

# Introduction

Transit agencies of all sizes face increased budget pressures and the need to do more with less. To maintain service levels, systems must also continue to attract new riders and retain existing ones, as well as ensure support from the community at large. The use of marketing principles and strategies is a significant tool for transit agencies in meeting these goals. Indeed, to maximize the impact of marketing, it must be viewed as a comprehensive process that is well planned, monitored, and evaluated. In a greater sense, the use of marketing techniques and strategies incorporate an emphasis on customer service throughout the transit organization and its relationships and communications with all of its "publics."

As our society becomes more and more a service-based economy, public transit entities (as well as most other public entities) have realized the importance of public image and quality communications. The transit industry has realized that it is not unlike any other industry or business sector when it comes to customer relations. Some of the most successful public transit systems have adopted an approach to marketing of services that does not differ from any privately owned or operated service. As the director of marketing of one of the more successful public transit systems said at a recent presentation to public transit marketing professionals on the system's marketing efforts, "stand up right now and shake off all of that public sector attitude — you are no different than any private sector service — be creative and positive and sell yourselves."

Transit systems of all sizes can benefit from paying attention to marketing theory and principles. Marketing theory says that there are a set of controllable variables that can be used to influence responses by buyers — product, place, price, and promotion. Good marketing, in the private and public sector, calls first for attention to design of a good product or service to fit consumer needs. Other tasks include determining the appropriate distribution channels (place) and price (fare), before supporting those tasks with a promotional program.

Applying these principles to public transit, marketing should be considered as service is developed and planned (routes, schedules, etc.), as it is distributed (fare media, sales outlets) and priced (fares, discounts, etc.), as well as in the traditional sense of how it is promoted (awareness campaigns, advertising, etc.).

In addition to following general marketing theory and principles, a public transit agency must also be cognizant of "people" as an integral component of the marketing mix. Services must adapt to the changing needs of the customers — for example, the increased need for accessible transport by an aging population. Message strategies also often focus on behavioral consequences - aimed at changing long-established habits. Some of the other challenges faced in public transit marketing include the following:

- explaining subtle or "invisible" benefits (increased transit use equaling less pollution and congestion),
- calling attention to the beneficiaries (the environment, health care costs),
- explaining long-term benefits,
- dealing with the public scrutiny of taxpayers or elected officials,
- dealing with multiple publics (the "public," politicians, administrators, other agencies),
- dealing with limited opportunities for modifying services (routes, schedules), and
- marketing the same services to a variety of groups (for example, senior citizens and students).

This handbook is not meant to provide all of the answers and suggestions needed to totally incorporate marketing principles into your institution. However, we have provided some hints on basics that are appropriate for use in the industry. We have also provided listings of resources for further information on specific topics. The guide was developed to especially assist rural and small urban transit systems that may not have full-time professionals assigned to marketing tasks. The information provided on specific projects can, however, be of interest and benefit to transit marketing professionals or managers of any type or size of system.

Our quick summary of components of a successful marketing program in this chapter includes the following:

- a review of the importance of customer service,
- some suggestions for planning a marketing program,
- some suggestions for evaluating the marketing program,
- an overview of fostering partnerships with the corporate world,
- some suggestions for handling media relations, and
- a checklist for planning an event.

## Fostering Consistent Quality Customer Service

Customer service is a topic that has received a good deal of attention in the popular media. Visit any large bookstore to find books in the business "self-help" section on improving customer service. There are a number of books in that genre that are written by Ron Zemke and Kristin Anderson and incorporate "knock your socks off service" in the titles. That series of books has been found especially useful to a number of transit managers around the country. In *Sustaining Knock Your Socks Off Service* and *Managing Knock Your Socks Off Service*, the authors note that superior service is created through a combination of eight tactics and practices, as follows:

1. Finding and retaining quality people
2. Knowing their customers intimately
3. Focusing their units on organizational purpose
4. Creating easy-to-do-business-with delivery systems
5. Training and supporting employees
6. Involving and empowering employees
7. Recognizing and rewarding good performance and celebrating success
8. Setting the tone and leading the way through personal example

The authors also point out possible major barriers to achieving high-quality customer service, as follows:

1. Inadequate communications between departments
2. Employees not rewarded for quality service or quality effort
3. Under staffing
4. Inadequate computer systems
5. Lack of support from other departments
6. Inadequate training in people skills
7. Low morale; no team spirit
8. Bad organizational policies and procedures

---

As you read through these lists of tactics and principles and possible barriers, think about your own transit organization. The common thread in both lists is the employee. Some public transit systems are beginning to tackle this issue head-on by changing the way they hire vehicle operators. The new emphasis is on personality and people skills, rather than technical driving ability. Assuming that driving skills can be taught, but developing friendliness and people skills are a bit more difficult to achieve.

The major point is that customer service and providing perceived value to the consumer should be woven throughout the entire structure of an organization - not just emphasized in a marketing campaign. **Customer service is an attitude.** Marketing research can assist in assessing it, but the marketing plan is just one place in a system's management structure that should continually consider customer service. Because of the importance of each individual employee to the organization's success, internal communications and effective organizational principles are also imperative. Some examples of internal programs are provided in the Internal Promotions Category.

## General Marketing Principles

### Developing a Marketing Plan — Planning to be Effective

Planning is the foundation of a successful marketing program. Transit systems don't put service on the street without a plan (a schedule, routes, service standards) or a budget, and the requirements for a marketing program are no different. Marketing planning will allow you to establish your goals, develop a course of action, and describe a methodology for evaluating the program's success and providing information to be used in the next planning cycle.

The Colorado Association of Transit Agencies, with support from the Colorado Department of Transportation and the Rural Transit Assistance Program, sponsored development of *The Marketing Cookbook — Recipes for Success*. The document was completed by the firm Communique, LLP, of Aspen, CO. Copies of the document may be acquired, at no charge, by sending a request and a self-addressed mailing label to the Colorado Association of Transit Agencies, 225 East 16th Avenue, Suite 1070, Denver, CO 80203.

The Colorado guidebook provides a very good introduction and summary of using strategic research, dealing with the media, advertising, public relations, crisis communications, evaluation, and planning. Included, for example, are detailed descriptions of the types of advertising to consider — newspaper, magazines, yellow pages, brochure distribution, direct mail, outdoor advertising, point of sale, as well as types of broadcast media - television, cable, radio, and Internet.

With the sponsor's permission, we have included a series of worksheets in the pages that follow from the "cookbook" that will walk through the planning process. Completion of the worksheets will establish the framework of an effective program. Scanning the projects and strategies included in this how-to book can be helpful in developing the action plan (Worksheet #5) for your marketing program.

## **Worksheet #1: Situation Analysis**

This is a look at your system and community. The goal is to identify both facts — the riders, non-riders, past successes, upcoming events, community demographics, etc. — as well as perceptions — what people think of us and our service. Much of this information will be available in your current transportation development plan (TDP) or other market research.

You will want to identify information about the system and the service area. You may well need additional sheets.

### **For the system, you should need:**

What were ridership trends, by segment and in total for the past year or two?

Which routes/services are popular, and why?

Which routes and services need ridership, and which are capacity-constrained?

How do customers now learn about the system? What sort of materials are available, and how are they distributed?

Who now rides the bus?

Who doesn't ride the bus, and why?

Are there service plans which should be considered?

What sort of service amenities are there (shelters, telephones, etc.)?

### **For your service area, you should record:**

What is the population in the service area?

What were growth trends in the last year or two?

What are growth projections?

Where are the population densities high?

Where are they low?

What are the trends in traffic?

What are the community's goals?

What role does the transit system play?

What is the political environment?

How do your customers perceive you?

How do elected officials and other influentials perceive you?

**Worksheet #2: Problems and Opportunities**

Based on the information gathered about the system and the service area, what are the main obstacles and opportunities facing your system? This should list all possibilities, which may be discarded or refined into goals on Worksheet #3.

Problems/Obstacles to Success:

Opportunities:

### Worksheet #3: Goals and Objectives

Simply put, these are statements of what you want to accomplish within a specific time frame. Goals must be specific and measurable. Similarly, they should be attainable. What is realistic and appropriate should be determined by the situation analysis.

In transit, goals can usually be expressed in terms of ridership, revenue, or image. In fact, you may have goals for each of these categories, such as:

- Increase ridership on route x by 3% by year-end, compared to the previous year-end.
- Increase transit pass sales by 6% by year-end, compared to the previous year-end.
- Increase awareness of the transit information line by 8% by a month and year as compared to the last time that data was available.

Goal #1

Goal #2

Goal #3

Goal #4

Goal #5

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## Worksheet #4: Strategies

If a goal is what you want to achieve, a strategy is how you will achieve it. For example, if you set a goal of increasing awareness of your information line, strategies may include print, radio and/or television advertising, placing the phone number on all fleet vehicles, and printed inserts placed into bank statements.

Generally speaking, you should develop several strategies to help reach each of your goals. While some strategies will be specific to one goal area, other strategies will overlap goal areas, so should be listed in each appropriate strategy worksheet.

[A separate sheet should be completed for each goal.]

### Goal #1

Strategy A:

Strategy B:

Strategy C:

Strategy D:

**Worksheet #5: Action Plans**

As with any planning process, the plan is only as good as its execution. Action Plans are the specific activities you will undertake to fulfill your strategies. It is recommended that projects be outlined and scheduled onto a calendar for the year. This provides the simplest framework for managing your marketing program over the course of the year.

A useful tool in developing your action plans is the removable adhesive notepad. Write each step involved in achieving your goals and strategies on a different note, and place it on a board. You can then add and delete steps, and move them around into the final order, helping to establish a time line and ensure that nothing slips through the cracks. These can then be entered onto a plan calendar that will remind you of upcoming deadlines throughout the year.

Work Project:

Purpose:

Description/time lines:

## Additional Resource

The Colorado marketing "cookbook" was written specifically with public transit systems in mind; however, there are others that have been successfully used by non-profit organizations. One example of such a workbook, that has been incorporated into a widely used transit marketing course is the Marketing Workbook for Nonprofit Organizations by the Amherst H. Wilder Foundation. Written by Gary J. Stern, the workbook also provides an array of worksheets for planning and executing a marketing program. Copies of the workbook may be acquired by contacting the Foundation at 800/274-6024, or by writing to Amherst H. Wilder Foundation, Publishing Center, 919 Lafond Avenue, St. Paul, MN 55104. Copies of the workbook are \$25.00. Permission to reproduce the worksheets is granted in the document. Volume discounts are also offered.

### Keeping Copyright Law in Mind

While this manual encourages the liberal sharing of ideas between public transit agencies and systems, copyright laws should also be kept in mind when borrowing from others - especially from any private entity.

The principle of "Fair Use" allows you to take facts freely; however, the expression belongs to the author. By judicious paraphrasing, authors are using facts without using the original author's expression.

While copyright law does not define the exact limits of fair use, here are some suggested questions that you might consider before publishing copyrighted material:

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2. What is the nature of the work from which quotes are taken?
3. Could it cause economic damage?
4. Relative to the total material, what percentage would be used?

Some suggested limits to use, without asking permission, is 300 words if it is from a booklength work; two lines from poetry; or 10 percent of a letter.

Under the U.S. Copyright Law of 1978, authors possess certain rights automatically upon creation of materials, even if there is no registration with the Copyright Office, although that is recommended. Original work should show a credit line and protect it by displaying the (c) symbol, with a name and year that the work was completed.

These laws apply to all manner of materials - from training materials to published works. In general, documents created for public transit systems are not to be used for profit. If there is any doubt, the author can be contacted to grant permission for using copyrighted materials.

Additional information on copyright can be obtained by contacting the Copyright Office Hotline at 202/287-9100 or writing to Copyright Office LM455, Library of Congress, Washington, D.C. 20559 and requesting Circular 2, Publications on Copyright. A wealth of information is available on the subject by accessing the U.S. Copyright Office in the Library of Congress through the Internet. The home page address is <http://lcweb.loc.gov/copyright/>.

In Canada, copyright is dealt with in a very similar manner. The Canadian Copyright Act provides that any "fair dealing" with a work for purposes of private study or research, or for criticism, review or newspaper summary is not infringement. However, in the case of criticism, review, or newspaper summary, the user is required to give the source and author's name, if known. Copyright issues are handled by the Copyright Office, a part of a larger agency called the Canadian Intellectual Property Office (CIPO), which comes under Industry Canada. Additional information on copyright can be obtained by contacting that office through the CIPO at 819/997-1936, or writing to Copyright Office, Canadian Intellectual Property Office, Industry Canada, 50 Victoria Street, Place du Portage, Phase I, Hull, Quebec, Canada, K1A 0C9. The Internet address is: <http://cipo.gc.ca>.

## Evaluating the Marketing Program

While the emphasis on marketing at public transit systems has appeared to have heightened in the past decade, the existence of an evaluation program for the marketing program is still very rare. Many systems have very limited resources available to implement the marketing strategies, much less measure the impact of them. However, there are some fairly simple measurements that can be noted to assist in evaluating the marketing program.

As mentioned in the section on developing the marketing plan, the plan should be written with evaluation in mind. Clearly stated goals and objectives should be as specific as possible, and measurable. The primary indicators to be used are ridership, revenue, and image.

### Ridership

The main outcome being measured is ridership on a route or service, compared to ridership for that same route or service during a previous time period. The units are usually periods of a month, quarter, and year. If it is a new route, or service, ridership may be benchmarked against the projections of ridership rather than historical numbers. It is important that the data be as accurate as possible.

### Revenue

The measurement of revenue is also fairly simple. Measure the amount of money generated on a given product (such as a certain fare pass) or service (fare box recovery). Benchmarks typically used include:

- projections made in the marketing plan (revenue compared to expectations)
- historical trends (revenue generated this month/quarter/year compared to previous time periods)
- revenue per passenger (total passengers/total revenue; for a route or the total system)
- revenue per hour of service (total hours/total revenue; for a route or the total system)
- revenue per mile of service (total miles/total revenue; for a route or the total system)

### Finding Other Resources Mentioned in This How-To Book

Most of the documents mentioned in this "how-to" book are available through the U.S. Department of Transportation's Technology Sharing Program (TSP). These documents were developed with direct or indirect support of federal funds. Single copies of in-stock TSP reports are available at no cost through the main on-line catalog accessed through the Internet at <http://www.tsp.dot.gov/>. All TSP reports are archived through the National Technical Information Service (NTIS) in Springfield, VA. When reports are no longer available through DOT sources, reports may be purchased through NTIS. Archived TSP reports may be browsed through the TSP web page, and a direct link to NTIS is provided. NTIS may be contacted directly at NTIS Sales Desk, Monday through Friday, 8:30 a.m. to 5:00 p.m. Eastern Time, at 800/533-6847 or 703/605-6000, fax 703/321-8547. Additional NTIS ordering information is available at the NTIS website - <http://www.fedworld.gov/ntis/ordering.htm>.

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## Image

Image is more difficult to measure because the data is not already being collected as a matter of daily record. It has to be collected through market research, and there should be a baseline established as a benchmark so that the results of the marketing efforts may be measured against the baseline.

## Ongoing Research Programs

An ongoing research program can include both qualitative research and quantitative studies. Examples of qualitative research could include focus groups and one-on-one interviews. Both of these types of research can provide insights that might be missed in a quantitative survey. They can also be very useful in surfacing issues and questions to be used in a quantitative survey.

Examples of quantitative research are:

- on-board surveys
- intercept surveys
- telephone surveys
- mail-back surveys

Below are some suggestions about each type of survey, taken from *The Marketing Cookbook - Recipes for Success*.

### ***On-Board Surveys***

Surveying existing passengers is the easiest, most cost-effective form of quantitative research for transit systems. Surveys can be issued to each passenger as they board, and collected as they disembark. Depending on the number of surveys collected, you may elect to tabulate every second or third survey to save on time and cost of data entry, while still arriving at a statistically sound sample. [A sample on-board survey is provided at the end of this section.]

Following are a few recommendations about on-board surveys gleaned from other transit operators' experience:

- Survey passengers in one direction only (inbound or outbound)
- If possible, offer a passenger free fare to assist the driver with distribution and collection of surveys
- Survey passengers on more than one day of the week (for example, Wednesday and Saturday) to get a more representative sample
- Prior to the survey day(s), use media releases and public service announcements to inform the public about the survey

### ***Intercept Surveys***

Intercept surveys are brief interviews (one to five minutes) conducted in places with high traffic volume, such as shopping or pedestrian malls. Intercept surveys are a cost-effective way to reach both users and non-users. However, results from intercept surveys do tend to be skewed slightly toward women and middle-income respondents, since statistically this is the majority of shoppers in America. Collecting surveys on a couple of different days of the week (for example, Wednesday and Saturday) and in several different locations will help provide a more representative sample. If you provide specialized services, senior centers, doctor's offices, and clinics can be useful survey sites.

Following are a few recommendations about intercept surveying:

- Think through where you will conduct the surveys, as the venue may affect respondent demographics.
- If possible, select attractive interviewers, and have them dress appropriately for the venue(s) in which the interviews will be conducted.
- Request interviews of a broad cross-section of respondent groups - men, women, older, younger, etc.
- Prior to the survey date, contact a random group of people living in the area by telephone and ask them to stop by to complete the survey, as this will eliminate some of the shopping mall demographic bias.
- If possible, offer a premium (for example, a free movie ticket or free bus pass) to help motivate respondent participation.

### ***Telephone Surveys***

Telephone surveys are, obviously, conducted over the telephone with either users or non-users residing in the transit operator's service area. Although slightly more expensive to conduct than intercept surveys, telephone questionnaires are very effective for measuring awareness and image of a transit system. Respondent lists can be purchased from a variety of sources, including the phone company, and targeted to many geographic, economic and demographic factors.

Following are a few recommendations about telephone surveying.

- If possible, share the cost of a telephone survey with related public service organizations such as the housing authority, the city or county planning office, or others interested in the statistical data that you are seeking such as a chamber of commerce.
- Make sure the questions are clear and concise.
- It is useful to test the survey questions prior to execution. Test the survey on people in your organization as well as others.
- Prior to the survey day(s), use media releases and public service announcements to inform the public.

### ***Mail-Back Surveys***

An alternative to telephone surveys is to distribute surveys by mail, with a postage-paid return envelope. As with telephone surveys, respondent lists can be purchased from a variety of sources, including the phone company, based on many geographic, economic and demographic factors. The advantage of mail-back surveys is that more complex questions such as "rank the following..." can be asked. On the other hand, mail surveys can be expensive, because a large number of surveys must be mailed out to ensure adequate response. Typical return rates on direct mail is one to two percent. This calls for a large number of surveys to be issued to get back a statistically significant return.

Following are a few recommendations about direct mail surveying:

- Offer incentives and bonuses for completing the survey, such as random prizes;
- Use postage-paid mail permits for return postage, so that postage is paid only on returned surveys; and
- Prior to the survey day(s), use media releases to inform the public of the survey

***Use of Information Gained from Research***

The information from the initial survey efforts will be very helpful in establishing priorities in the marketing plan. Once the plan is developed, and strategies implemented (with the type of measurements to judge success in mind in advance), the results of the next survey efforts can demonstrate the impact of the strategies. These results will then be very helpful in developing the next marketing plan. The evaluation program should be a consistent part of the annual marketing plan, providing the research each year for updating and improving upon the marketing plan.

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**SAMPLE PASSENGER SURVEY**

We are conducting a study regarding our transit services, and would appreciate your taking a few minutes during your trip to complete this survey.

1. How often do you ride transit?  
 Less than once a month       1 to 4 times a month       1 to 2 times a week  
 3 to 5 times a week       6 or more times a week
2. How long have you regularly ridden transit?  
 First time       Less than 1 month       1 to 3 months  
 4 to 6 months       7 to 12 months       1 to 3 years  
 4 to 6 years       7 to 10 years       More than 10 years
3. How likely is it that you will continue to ride transit?  
 Very likely       Somewhat likely       Not very likely
4. What is the purpose of this trip?  
 Work       Shopping       Medical  
 School       Personal business       Social/recreation
5. How did you get to this bus/van?  
 Walking less than 3 blocks       Walking 3 or more blocks       Was driven to the stop  
 Drove self to stop       Transferred from another route       Rode a bicycle  
 Other (Please specify): \_\_\_\_\_
6. Did you have a car available for this trip?  
 Yes  
 No
7. Do you have a valid driver's license?  
 Yes  
 No
8. If you drove to the stop, where did you park?  
 Designated park and ride lot       General "on street" parking  
 Other (Please specify): \_\_\_\_\_
9. How far do you normally travel to work?  
 Less than one mile       1 to 3 miles       4 to 10 miles  
 11 to 20 miles       21 to 30 miles       31 to 40 miles  
 Over 40 miles
10. Why did you choose to ride transit? (Check as many as may apply)  
 Only alternative       No car available for this trip       Avoid traffic  
 Save time parking       Save money on the cost of travel  
 Employer provides transit pass       I care about the environment  
 Other (Please specify): \_\_\_\_\_

Following are statements about this transit service. We would like to know your opinions. Please check only one answer per statement. You should check the box that corresponds to how strongly you agree or disagree with the statements.

11. It's reliable.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
12. It's convenient.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
13. It's as fast as going by car.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
14. It's economical.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
15. It's usually on time.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
16. The drivers are safe.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
17. The drivers are friendly.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
18. Route/schedule information is readily available.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
19. Information is understandable.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
20. The vehicles are comfortable.  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree
21. Transit services should be publicly subsidized (by taxes).  
 I agree very strongly       I agree strongly       I agree somewhat       I don't really agree

How would the following things or events affect your current transit usage?

22. Earlier morning service  
 Definitely ride more often       I might ride more often       It would have no effect       I might ride less often
23. Later evening service  
 Definitely ride more often       I might ride more often       It would have no effect       I might ride less often
24. More frequent commuter service  
 Definitely ride more often       I might ride more often       It would have no effect       I might ride less often
25. More frequent mid-day service  
 Definitely ride more often       I might ride more often       It would have no effect       I might ride less often
26. Fare increase of 50 cents  
 Definitely ride more often       I might ride more often       It would have no effect       I might ride less often
27. Fare decrease of 50 cents  
 Definitely ride more often       I might ride more often       It would have no effect       I might ride less often

28. You are:       male                       female

29. Your age is:  
 Under 13     35-44     13-18     45-54     19-24     55-64     25-34     65+

30. Your occupation is: \_\_\_\_\_

31. Your total annual household income is: \_\_\_\_\_

32. Please provide your ideas for improving this service: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

THANK YOU FOR YOUR ASSISTANCE!!!

*Source: The Marketing Cookbook - "Recipes for Success"*

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## Sample Telephone or Intercept Survey

We are conducting a study regarding transit services, and would like to ask you a few questions.

1. What is your usual mode of transportation?
 

<input type="checkbox"/> Walk	<input type="checkbox"/> Ride bicycle	<input type="checkbox"/> Ride public bus/van
<input type="checkbox"/> Ride private bus/van	<input type="checkbox"/> Carpool	<input type="checkbox"/> Drive alone
<input type="checkbox"/> Other (Please specify): _____		
  
2. How many miles do you think you normally travel in a day?
 

<input type="checkbox"/> Less than 1 mile	<input type="checkbox"/> 1 to 3 miles	<input type="checkbox"/> 4 to 10 miles
<input type="checkbox"/> 11 to 20 miles	<input type="checkbox"/> 21 to 30 miles	<input type="checkbox"/> 31 to 40 miles
<input type="checkbox"/> Over 40 miles		
  
3. Do you usually have a car available?
 

<input type="checkbox"/> Yes
<input type="checkbox"/> No
  
4. Do you have a valid drivers license?
 

<input type="checkbox"/> Yes
<input type="checkbox"/> No
  
5. How often do you ride transit?
 

<input type="checkbox"/> Never	<input type="checkbox"/> Less than once a month	<input type="checkbox"/> 1 to 4 times per month
<input type="checkbox"/> 1 to 2 times a week	<input type="checkbox"/> 3 to 5 times per week	<input type="checkbox"/> 6 or more times per week
  
6. How would you rate the overall quality of transit services in your community?
 

<input type="checkbox"/> Excellent	<input type="checkbox"/> Good	<input type="checkbox"/> Satisfactory
<input type="checkbox"/> Poor	<input type="checkbox"/> Unacceptable	
  
7. Why do you choose to ride transit?
 

<input type="checkbox"/> My only alternative	<input type="checkbox"/> To avoid traffic / driving	<input type="checkbox"/> To save money / time
<input type="checkbox"/> I care about the environment	<input type="checkbox"/> I never ride transit	
<input type="checkbox"/> Other (Please specify) _____		
  
8. What keeps you from using transit more?  
(Check all that apply)
 

<input type="checkbox"/> House of service	<input type="checkbox"/> Frequency of service	<input type="checkbox"/> Cost of service
<input type="checkbox"/> Reliability	<input type="checkbox"/> Convenience of departure/arrival	<input type="checkbox"/> Convenience of stop location
<input type="checkbox"/> Personal comfort	<input type="checkbox"/> Information about routes/schedules	<input type="checkbox"/> Personal safety
<input type="checkbox"/> Other (Please specify): _____		
  
9. How far from your home is the nearest stop?
 

<input type="checkbox"/> 3 blocks or less	<input type="checkbox"/> 3 to 6 blocks	<input type="checkbox"/> 7 to 12 blocks
<input type="checkbox"/> More than a mile	<input type="checkbox"/> Unsure	
  
10. Should transit services be publicly supported by taxes (like policy, fire, and other community services)?
 

<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Unsure
------------------------------	-----------------------------	---------------------------------
  
11. Do you have any comments or suggestions to improve transit services in your community?

Thank you for your assistance!!!

Source: *The Marketing Cookbook — "Recipes for Success"*

## ***Additional Evaluation Tools***

Because it appears that so little evaluation of marketing strategies is being captured by systems across the country, we have provided below more discussion on the subject of evaluating pricing-related promotions. There are a variety of pricing-related promotion examples included in this how-to book. The suggestions for evaluating pricing-related promotions come from the Public Transportation Marketing Evaluation Manual - Techniques for Data Collection that was prepared under the federal transit technical assistance program. Individuals interested in acquiring a copy of the document may do so by contacting the Technology Sharing Program (see page 192).

### ***Data Collection Techniques for Pricing Promotions***

#### *Overview*

The marketing mix includes product, place, price and promotion (for public transportation "product" and "place" can be combined into "service"). The "price" term in the marketing mix is not what we're discussing here, which refers to the normal ongoing and regular price of a service or a product. What we ARE discussing is pricing promotions, which are part of the fourth element of the marketing mix - promotion. Pricing promotions are included in this category, along with advertising, publicity, direct sales, graphics and incentives.

Pricing promotions fall under the broader promotional category - incentives. Pricing promotions include a short-term reduction in price in order to increase sales. They can, in the case of public transportation, include

- free rides,
- discounts on passes,
- fare discounts during off-peak hours,
- distribution of coupons good for free or reduced fare rides, and
- merchant discount programs.

The last item mentioned is a program in which riders receive coupons as they board a public transportation vehicle (or purchase a monthly pass) which is, in turn, worth a discount at participating merchants. Although this is not directly a discount on the transportation fare, customers do gain an economic incentive almost equal to a fare, or indeed sometimes more, thus the reason for categorizing it as a pricing promotion.

It is rather arbitrary as to when (how much time) a short-term manipulation in price must be in effect before a pricing promotion becomes a basic change in pricing structure. To keep issues simple, we will simply call a price change (either in the cost of a fare, or an economic return of some sort) a pricing promotion if it is not a basic change in the pricing structure and is viewed as temporary.

Pricing promotions are one of the easiest promotional strategies for which to gather data. This is so because the explicit goal is to increase sales (rides), so the most logical data collection technique is to measure ridership. In contrast, one must measure attitudes, cognitions, knowledge, intimidation and so forth when evaluating consumer information aids and advertising. There are, however, some other dependent variables that one might want to look at beyond ridership when evaluating pricing promotions. In merchant discount programs, for example, it might be appropriate to assess the merchants' satisfaction with, or willingness to stay in, the

discount program, or to measure the number of increased customers a merchant received because of involvement.

Data collection techniques are provided that are appropriate for evaluating:

- free and reduced fare programs (no coupon necessary - simply a reduced or free fare when boarding a vehicle)
- pass discounts
- coupons good for fare reductions
- merchant discount programs
- lotteries (each fare paying passenger has odds on winning a prize)

### **Techniques**

Technique:	<b>Ridership counts</b>
Apply to:	Free and reduced fare programs, pass discounts, coupons good for fare reductions, merchant discount programs, lotteries
What it measures:	Ridership
How it works:	Ridership is measured by fare box revenue, manual passenger counts, or by automatic passenger counters. It would be ideal to get counts before, during and after the program. It would even be better to also measure ridership on routes on vehicles without the pricing promotions, so one could obtain good concurrent control data.
Advantages:	Strong proof, if appropriate controls are taken, of the impact of the pricing promotion.
Disadvantages:	Day-to-day vacillations in ridership due to uncontrollable variables such as weather may override the effects of the promotion. It is often difficult to get accurate ridership counts at reasonable costs.
<hr/>	
Technique:	<b>Pass sales</b>
Apply to:	Pass discounts, merchant discount programs, lotteries
What it measures:	Pass sales
How it works:	Through the pass sales or accounting office, document pass sales during a pricing promotional program. Appropriate controls would be necessary (e.g., pass sales before and after the promotional program). Technique directly assesses impact of pass discount programs and merchant discount programs and lotteries when the benefits are contingent upon pass purchase. Pass sales may also go up when a merchant discount or chance on a lottery are contingent on simply boarding a transit vehicle.
Advantages:	Easy data to collect as pass sales are routinely collected by the sales or accounting departments.
Disadvantages:	Pass sales may not directly correlate with ridership changes. Also, it may be hard to obtain "fine grain" data on pass sales (e.g., sales in the mornings, or sales from individual outlets).
<hr/>	
Technique:	<b>Coupon tracing</b>
Apply to:	Pass discounts, coupons good for fare reductions
What it measures:	Number and type of coupon turned in
How it works:	Different types of coupons, good for a reduction on either a pass

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	or cash fare are distributed to potential consumers in a controlled fashion (i.e., a control group gets same mailing, etc., but with no coupons). Coupons of various types (color coded) are deposited in the fare box when used and counted daily. Control group is called by phone to measure their bus riding.
Advantages:	Simple, easy to administer way to document a variety of pricing promotions in a controlled fashion.
Disadvantages:	Some problems include: consumers' negative reaction to coupons, counterfeiting, and coupons jamming the fareboxes.

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Technique:	<b>Merchant data</b>
Apply to:	Merchant discount programs
What it measures:	Sales by participating stores, discount coupons turned into participating stores, attitudes of participating merchants, and merchant willingness to stay in the program.
How it works:	Coupons for discounts at local stores are given to transit customers as they board a vehicle or purchase a transit pass. If the participating merchants will allow it, changes in sales data and/or an accounting of the coupons turned in to their stores would be excellent data. At the least, the merchants' attitudes (over time) in regards to the program or their willingness to stay in the program would be good data.
Advantages:	Retail sales data and number of coupons returned are easily collected by the stores.
Disadvantages:	A merchant may not want to divulge his or her store's data. A small number of participants (customers) in such a program may count as a success for the transit agency, but a new customer for a small store may be beneficial from the merchant's perspective.

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Technique:	<b>Surveys</b>
Apply to:	Free and reduced fare programs, pass discounts, coupons good for fare reductions, merchant discount programs, lotteries
What it measures:	Rider, nonrider and merchant attitudes and knowledge of the pricing promotion, and rider reports or rides taken during the program.
How it works:	As in the case for consumer information aids and advertising, much information can be gathered via surveys. Surveys for pricing promotions can be administered on the phone, through intercept interviews on the street, in a mall or on a transit vehicle. They may be guided or self-administered. Questions should range from subjective ("Do you like the merchant discount program?") to objective ("Did you ride the bus yesterday?").
Advantages:	Can gather a lot of data, from attitudes and knowledge to reported ridership. Can assess some of the more subjective aspects of a pricing promotion, which may tease out subtle effects of a pricing promotion.
Disadvantages:	People's answers to surveys may not be accurate indicators of their ridership, and the technique is more expensive than many of the others.

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Technique:	<b>Focus groups</b>
Apply to:	Free and reduced fare programs, pass discounts, coupons good for fare reductions, merchant discount programs, lotteries
What it measures:	Attitudes and preferences about pricing promotions presented
How it works:	Before, during or after a pricing promotion, a focus group would be a good way to get a subjective overview of the program. Ten to fifteen citizens (riders or nonriders or a mix) are selected from a population segment and attend a one to two hour session to convey their thoughts on the pricing promotion in question. A "neutral" focus group facilitator keeps the group focused on the subject and stimulates discussion without asserting his or her views. A focus group session before the introduction of a pricing promotion could yield valuable data for the design of the program.
Advantages:	Relatively efficient in time and money; technique garners a wide range of information in regards to the pricing promotion.
Disadvantages:	Subjective data may not be indicative of actual impact of a pricing promotion; a dominant member of the focus group could lead other members and bias output.

## Developing Partnerships with the Community

Many of the ideas that are presented in this "how-to" manual involve working cooperatively in partnership with the corporate community or other non-profit or governmental entities. Below is an overview of things to keep in mind when developing these sort of partnerships. These suggestions were based heavily on the public relations course presentations of Ms. Alison Ducharme of AD & Associates in Victoria, British Columbia. Ms. Ducharme is a marketing, sponsorship, and event management consultant who also lectures at the University of Victoria.

Corporate sponsorship of the 1960s and 1970s was seen as primarily philanthropic, with funds coming from corporate "donations" budgets. The business of corporate sponsorship has evolved over the years however. Many corporations viewed the corporate sponsorship opportunity from an emotional perspective rather than as being made for good business purposes. The competition for the donations was less intense than today - with fewer not-for-profit organizations seeking support.

Today corporate sponsorship has become a sophisticated business for organizations both large and small to ensure future sustainability. Corporate sponsorship programs are now integrated into the company's marketing plan and more results oriented. With much more competition for the scarce corporate sponsorship dollars, corporations are in a position of choosing the organizations with which they wish to partner. More often than not, the decision is based on the business appeal of the partnership. As a result, non-profit organizations (and public transit agencies) have had to increase the knowledge of their staff in the areas of developing corporate resources.

Acquiring corporate sponsorship is an involved process that can realize big financial gain. However, the process requires planning, just as any other component of the marketing program. A methodical, strategic plan is required prior to recruiting any sponsors. Once this groundwork is accomplished and the organization is clear about its goals and objectives, the success rate will be much greater.

Prior to targeting potential corporate partners, it is recommended that an agency consider the types of organizations with which they wish to be publicly linked in the mind of the consumer. A worksheet is included for use as you consider potential corporate sponsors. Team meetings within your organization can provide opportunities for gathering critical information to consider this issue, as well as discussing your own image strengths.

Corporate executives normally provide a small window of opportunity for delivery of a message and requested sponsorship, thereby requiring a focused, straight-forward and concise presentation. The presentation should be a maximum of 20 minutes in length, with the opportunity for questions and clarification beyond that time. The presentation should focus on meeting the objectives of the corporation. As Ms. Ducharme puts it, "bait the hook to suit the fish, not the fisherman."

Prior to developing the proposal and presentation, the agency should do research on the potential sponsors. Knowing the corporate sponsor's objectives allows the proposal to relate directly to that company's bottom line. The proposal should succinctly include an overview of the project being suggested for sponsorship, the business advantage that the corporation will realize from its participation, and a clear summary of the dollars requested.

Once a corporation or other public entity agrees to be a partner with a public transit agency in a project or program, it is essential to maintain ongoing communications. Honest, regular communications is essential to building a strong, longterm partnership. These communications will allow both parties to discuss how the project or program is meeting the short-term and long-term expectations of each, and allow the discussion of future partnering opportunities. In-person or telephone visits remind the corporate sponsor of the desire of the agency to provide them with value for their participation. It can also lead to more creative, mutually beneficial projects.

## Value Model for Sponsorship Acquisition Worksheet

### Event Description

Write down a few key words that capture your event - what, where, who, why:

### Principle Level

On principle, we will not affiliate with companies or organizations who:

*(For example, engage in unhealthy/unsafe practices; endorse products/procedures that endanger the environment; actively discriminate)*

### Preference Level

We would prefer to affiliate with companies or organizations who:

*(For example, are proactive in health/wellness/sport/recreation; are proactive in employment equity, access and inclusiveness; are proactive in environmental awareness; possess a positive employment record; are good corporate citizens; are headquartered in our area)*

## Using Media Relations as a Marketing Tool

Being public entities, most public transit systems will be the object of media coverage. But solid media relations can also be a mighty tool for marketing of the system. Below are some suggestions for media relations that come from the transit marketing handbook, *Promotions Publicity and all that Pizazz - Round Two*, published in November 1994 by the Ontario Urban Transit Association's Centre for Transit Improvement.

- Decide upon an official transit spokesperson and at least one designated back-up person. Stick to this!
- Know what is going on in your transit system and in your community, now and in the foreseeable future. Above all, know your market. Become involved in organizational meetings. Maintain strong communication with staff. You want to be able to promote good news and to be prepared to effectively release or contend with bad news. After all, how can you promote a heroic deed if you don't know about it? And, how can you be prepared for a negative incident if you are unaware of it?
- Don't just talk a good game, play it. Nothing will discredit you more than to promise something which you are not prepared to deliver. Be timely about putting plans into action, and keep the public informed of those time lines. Really blow the horn once the plans take effect.
- When the media approaches you for a story or an interview, ask what the direction of the story is and what questions the reporter wants answered. Tell the reporter that you will get back with the information prior to the media deadline, and do so.

Unfortunately, however, reporters often call at the last minute, giving you no time to prepare. Convert them! Tell them that the information they will get is, by necessity, minimal or incomplete, and offer them excellent results when and if they give you adequate notice. Then follow through. It is easier for a reporter to write a column with a stack of good, reliable information than with just a few scraps of hearsay. And remember, if you do not know the answer to a question, say so. Offer to find out and get back to the reporter.

- Most things are not worth hiding from the press. They can find out anything that is public information anyway. When you release the information you will at least have some control over what and how it is released.
- Read everything you can about the media. Libraries, community colleges, universities, various marketing associations and electronic bulletin boards are all great sources of information. Attend lectures and seminars about media relations. Take careful notice of key articles in your local newspapers and on radio and television stations. What are the main elements? How could a spokesperson, or someone quoted in an article, have worded something more positively?
- Get to know the local reporters who are writing transportation-related articles. Build a relationship with them. They can be your best friends (and your best and cheapest form of advertising). Invite them into your transit facility (after you thoroughly prepare staff for the event); explain the ups and downs of running your transit system. Offer to answer any questions they may have which come up after the visit.

Call or have someone on your team personally call them every time an opportunity for a transit story comes up. Nothing you do can put you more on the side of a reporter than calling him/her with a negative story (which is going to come out anyway). They will get the "scoop," and you get their trust and are able to minimize damage on a potentially "lethal" story!

Regardless of how good a relationship you have with local reporters, try to keep an open mind. Remember that a negative story usually gets more reaction than a positive one, and no matter what you do, you are going to see some articles that you won't like!

- Fax corrections to mis-quotes right away. If necessary, you can always buy an explanatory ad to help turn around bad or incorrect coverage. Take the initiative to "mend fences." When a reporter has written a negative article, call and offer your side of the story. Keep the tone positive. The only thing that will be achieved by making enemies in the media is to ensure continued bad press!
- Evaluate your press relations on an ongoing basis. Are you getting enough coverage? Is most of it good? Are certain papers or radio stations ignoring you? You will never have everyone "on your side" all of the time, but by building strong media relations you will certainly improve the odds!

If you do not believe that you are getting enough media coverage, do not be shy about proposing ideas to the media. Especially in small media markets, the newspaper is often very receptive to receiving good black and white photographs with caption details and stories about events, actions taken, new services, or any other "news worthy" activity of the agency.

Keep in mind that "human interest" is a big factor. Pictures of new equipment might be run, but a picture of a new bus that includes an official of the agency and a regular rider will be more likely to be included in the newspaper. Background sheets on issues or events are also helpful to the media in developing their own stories about your system. Routinely provide this information to key media contacts.

If there is no one on the agency staff that has experience in writing stories or announcements in the style used by newspapers, radio stations or television stations, the most convenient and least expensive way to gain this expertise could be contacting a local high school, junior college, or college journalism teacher and borrowing a textbook. There are also some excellent texts available through the mass media that provide the basics of writing and formatting news releases. The following are currently readily available in bookstores, or through online booksellers:

- *Bulletproof News Releases: Help at Last for the Publicity Deficient*, Kay Borden, Franklin Sarrett Publishers, January 1994.
- *Writing Effective News Releases...: How to Get Free Publicity for Yourself, Your Business, or Your Organization*, Catherine V. McIntyre, Piccadilly Books, June 1992.
- *Marketing for Dummies*, Alexander Hiam, IDG Books Worldwide, Inc., 1997.
- *Guerrilla P.R.*, Michael Levine, HarperBusiness, 1993.

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## Some Spokesperson Do's and Don'ts

Below is a checklist of Do's and Don'ts for the person who is going to be the active spokesperson, or back-up spokesperson for the agency. This list was compiled by a corporate communicator, but is just as appropriate for the public sector.

### Some Do's...

**DO** Practice the art of bridging - moving a conversation from where someone else wants it to where YOU want it. You do it already in everyday conversation; look for opportunities to improve your skills. It should always be done with finesse and a smile.

**DO** Practice the art of turning a negative into a positive. Remember that the very nature of news is what went wrong, and an interviewer's questions will generally, quite naturally, be couched in negative terms. For every negative, there is a positive. Don't be afraid to "bite the bullet," acknowledging the negative, and without pausing for breath, move directly to the positive points you can make.

**DO** Remember the value of a smile and a handshake. Even when all else has gone wrong, such positive displays of body language can quite literally save the day.

**DO** Do your homework. Your interviewers will have done theirs. Even if the topic is your specialty, do your homework. Don't forget that the interviewer will have gone back to the very basics.

**DO** Recognize the value of playing "the Devil's Advocate," even if you must be your own. If at all possible, involve your professional peers. Have them demand that you respond to the toughest questions possible, in private, before you go public. Make sure you have acceptable answers. Anticipate.

**DO** Remember your audience. Could the average 10th grade student understand what you are saying? Would he or she care? Are you using language he or she can comprehend? Avoid technical jargon.

**DO** Go beyond the interviewer for understanding. If it is worth your time and energy, it should be worth it for you to affect the outcome of understanding.

**DO** Speak in 30 second quotes. In spot news situations only, remember, the longer answer cries for editing. The 30 second answer goes as stated in 90 percent of the cases. Eliminate superfluous verbiage. Stay with the facts.

### ...and some Don'ts

**DON'T** Talk about things you know nothing about. No "third party" discussions, no answers to hypothetical questions, no "what if" speculation, and no conversation about what some other entity may be thinking, planning or doing.

**DON'T** Bluff or lie. Morality aside, a good newsperson will know you are lying, expose you for doing so, and your credibility, already low, will be destroyed.

DON'T Be afraid to admit that you don't know the answer to a specific question. If you don't know, say so, and add the magic words, "...but I will find out and let you know." Such an admission, done with candor, can make more of an impression with the viewer than all of your facts and figures combined.

DON'T Give the interviewer ammunition. If you're an oil company executive, it's poor procedure to mention the excellent mileage your wife's Mercedes Benz gets not that you've paid someone to remove the air pollution equipment, which leads us to:

DON'T Go off the record. EVER. Unless you are willing to put your personal career and the best interests of your company in the hands of another person.

DON'T Use negative "buzz words" such as "obscene profits, rip-off, disaster, tragedy, holocaust," etc. If your interviewer uses them, don't repeat them. One exception: The accidental loss of human life is a tragedy by definition. Don't refer to such an event as an "unfortunate incident." EVER!

DON'T Lose your temper or weep on television. Either will assure an unedited interview on the 6:00 and 10:00 news.

DON'T Offer personal opinions. You are your company.

DON'T Use the term, "no comment." EVER! In your viewer's mind, it means you are as guilty as if you had committed a crime and then taken the Fifth Amendment.

DON'T Waste time with preface remarks. Remember the pyramid, and open with the point you want to make. Don't tell what you want to talk about, talk about it!

**In summary:** Control is the key, achieved by leading, not following, by being excited and enthusiastic about your subject, by having a reason to be there, and that reason obviously, clearly important to you.

## Planning for Successful Events

When surveying public transit systems throughout the country for their best low-cost, effective marketing ideas, we found that even the smallest systems, with no stated budget for marketing, were often able to achieve big results with some sort of public event. Whether it is an annual open house for advisory board members and the staff, or major events with substantial corporate sponsorship, there are some common considerations to planning a successful event.

Below are a series of questions that public transit marketing professionals or managers should pose as they plan an event. The questions are based on advice on the subject included in the handbook, *Promotions, Publicity and all that Pizazz - Round Two* by the Ontario Urban Transit Association's Centre for Transit Improvement."

- First, why are you having an event? What is in it for your transit system? What is in it for your target audience?
- What is the goal of the event? What materials and effort will be required?
- When should you have the event? When will it have the greatest impact (what day of the week, time of day, season)?
- When can you schedule the event to have the least competition from other activities? When does it make the most sense for your own transit system schedule (in terms of competing with staff involvement in service or schedule changes, other major events)?
- When will you need to begin planning to allow for all of the details to be accomplished? (Be sure to leave time to acquire the approvals, sponsorship, suitable notification time to participants.)
- Who will be involved in planning and executing the program or event? Who else is available to assist or participate?
- Who should be considered for possibly co-hosting an event or sponsoring the activity?
- Who will speak at the event? Who will gain you the best advantage for media coverage?
- Who will be the guests/audience at the event? Who is your target audience?
- Where will you hold the event? Where can you get the most for your dollar? (Where can you use a location for no charge?) Where can you ensure appropriate accessibility? Where is a location that meets all of these requirements and is also on a transit route, with available parking, and easy to find?
- Where will the audience or participants be most comfortable?
- How will the program or event be funded?
- How will you determine if the event will be worth the effort? How will taxpayers perceive the event?