



Switching to public transport

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Abstract:

The Passenger Transport Board is responsible under the Passenger Transport Act, 1994 for the regulation and funding of all land passenger transport in South Australia. One of the key objectives of the Government is to reverse the trend of patronage decline.

Market research shows that 35% of the Adelaide metropolitan population are non-users of public transport. Based on longitudinal studies carried out in Kassel and Nurnberg, Germany, the PTB initiated a 12 month *Switching to Public Transport Project* (mid-November 1996 - October 1997) to determine successful stimuli to convert non-users into users of public transport, and to assess the characteristics of those who will make a sustained switch. Direct marketing efforts can be employed based on these findings, and increased proficiency from experience will make for greater cost-effectiveness to improve patronage through gaining market share from non-users trips taken by private vehicles.

The participants selected were non-users, adults, sufficiently mobile and using other modes of transport to get to destinations serviced by public transport. The participants were provided with free public transport trips for three and one-half months, 50% of a frequent user's public transport trips for the following month, 25% the subsequent month, and left participants to buy tickets the succeeding month. Monthly their public transport use, modes, the purpose of their trips, day of week/time of day, and satisfaction were recorded. After a further six months elapsed, participants were contacted again to ascertain their use and views on public transport.

The purpose of the paper is to report the lessons learnt from the project's findings on the priority features of a public transport system to enable new customers to feel comfortable to try and come to use public transport in their routine travel habits. As a very successful project, the paper will inform what effective stimuli were utilised in this project methodology in the Australian cultural context to cause participants to sample public transport services (91% effective) and to maintain active participation in the project (only 12% attrition rate at month 7).

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Introduction

This paper will explain how the Passenger Transport Board initiated an innovative project called *Switching to Public Transport* to find out more about how it can convert non-users of public transport to become consistent users of public transport. The views expressed in this paper remain the responsibility of the author only.

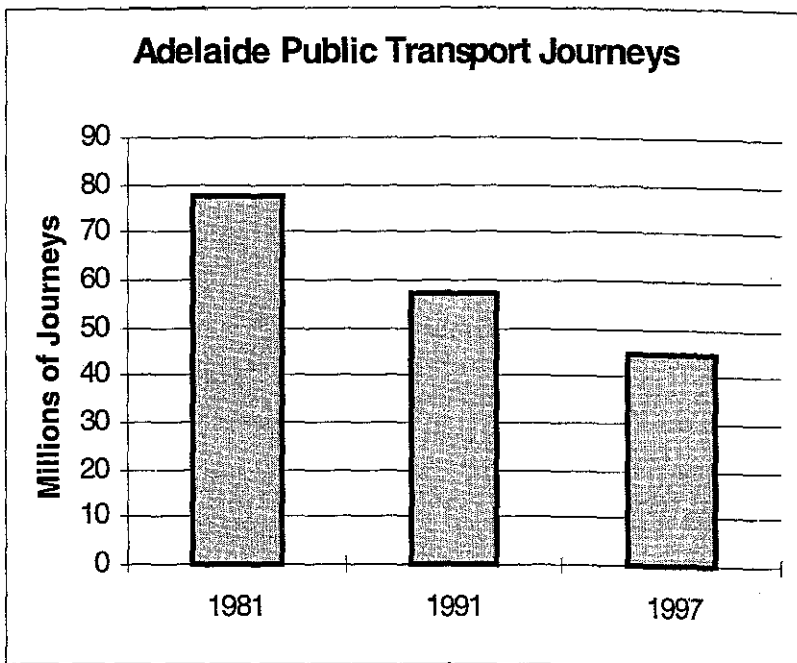
Background

Public transport is generally accepted to have decreased in use in most developed countries in the past 30 years. The private vehicle with driver as the sole occupant has increased its market share in passenger transport.

Total journeys ie turnover for Adelaide's public transport, as measured by the PTB's Patronage System, has diminished in the trend illustrated in Figure 1.

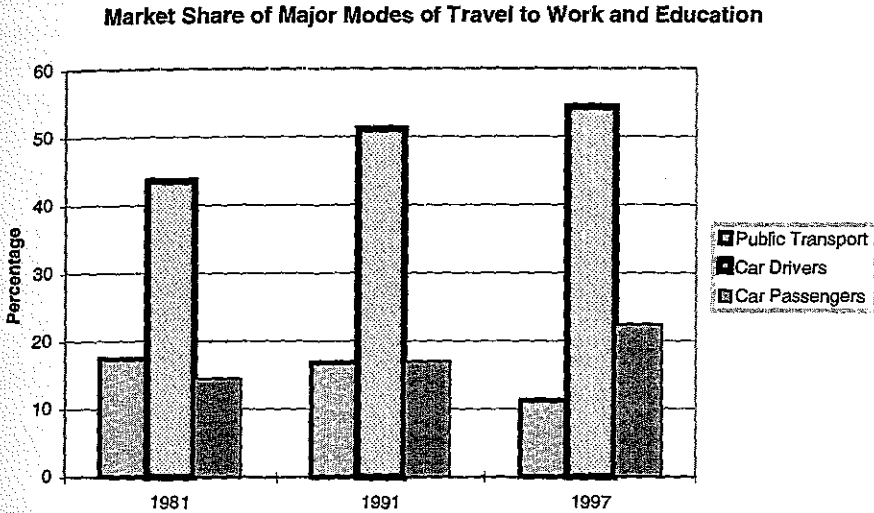
Figure 1- Reduction in Adelaide public transport journeys financial years ending 1981, 1991, 1997

(source: SA State Transport Authority Annual Reports for the financial years ending 30 June 1981, 1986, and SA Passenger Transport Board Annual Report for the financial year ending 30 June 1997)



Australian Bureau of Statistics findings of 1981, 1991, and 1997 Adelaide metropolitan private and public transport use for travel to work and education independently record public transport's erosion of market share.

Figure 2 - Erosion of Adelaide public transport market share
(source: Australian Bureau of Statistics, 1981, 1991, and 1997, p 1)



The SA Liberal Government was elected on a platform in December, 1993 which stated:

"Our goal, in partnership with the industry, will be to attract customers to public transport services - and to generate repeat business!" (Passenger Transport Strategy, 1997, p 4)

The consultancy, Socialdata, conducted demonstration experiments in Kassel and Nurnberg, Germany called *Switching to Public Transport* which were reported by the International Union (Association) of Public Transport (UITP) to be highly successful in converting infrequent-users of public transport to become public transport customers. In November, 1995, the UITP invited the PTB to be part of a collective action with other UITP members worldwide to begin March, 1996, uniformly following the methodology employed in the Kassel and Nurnberg demonstration projects. It was the author's view that the monthly pass incentive was too short, the data collection of all household trips so onerous as to risk high attrition rates we could not afford within our budget, and the comparability of results dubious due to the low housing density of the Adelaide metropolitan area compared to European cities. The PTB declined the offer, but pursued its interests in piloting a modification of the Kassel and Nurnberg demonstration projects.

The feature of those programmes which was particularly successful in converting non-users was personal representation. That is, where a public transport employee initiated communications and gained a rapport with the non-user or fledgling user of public transport, conversion of that non-user or fledgling user to become a regular user of public transport was greatest.

In July, 1996, the Passenger Transport Board and TransAdelaide Lonsdale, a Business Unit of TransAdelaide, a South Australian Government Enterprise, and contractor for the provision of bus services in the "Outer South" of metropolitan Adelaide, agreed to assist in the conduct of a *Switching to Public Transport* project, using residents of that area as participants. The Outer South roughly gained 7% in population from 1991 to 1996 (*SA Department of Housing and Urban Development Population Projections 1991 - 2016*) and between March, 1992 and March, 1996 roughly lost 11% in average weekday bus boardings

Objectives

The objectives of *Switching to Public Transport* are centred around gaining information from the non-users of public transport who sample the use of public transport:

- to determine the demographic characteristics of individuals who become consistent users of public transport;
- to determine tell-tale habits and attitudes of people who take-up use of public transport; and
- to determine what factors influence the satisfaction of these new customers with public transport.

This information can then be used in cost-effective direct marketing efforts to convert non-users of public transport to become our customers. A body of knowledge will be gained from each sample to become increasingly more cost-effective.

Project Structure and Communication

The Project began on 18 November 1996 with 180 participants screened by The Market Research Company and Surveys Australia as non-users of public transport.

Seven waves of telephone surveys and subsequent reports marked progress and changes to 31 May 1997.

No contact was made with participants during the period from 1 June to 30 November 1997.

A further telephone survey was conducted in early December

The Project was divided into two phases.

- Phase 1 involved:

- ⇒ free unlimited transit with non-transferable tickets between 16 November 1996 and 28 February 1997, with participants given *Switching to Public Transport* Personal Identification Cards for presentation to Ticket Inspectors (Drivers and Inspectors were informed about the project and invited to make these new customers welcome);
- ⇒ two Multitrip tickets, offering 20 free trips, provided for month of March;
- ⇒ one Multitrip ticket offering 10 free trips, given for month of April;
- ⇒ participants would use remaining Multitrip ticket trips and buy their own in May;
- ⇒ monthly delivery (November - May) of personalised letters, public transport publicity (*including special events, and premium services*), timetables, public transport trip detail sheets, ticket wallets, environmental information, address lists of Licensed Ticket Vendors in their area (*50% of participants gaining them in person from a PTB and/or TA Lonsdale representative, and 50% of participants receiving the same material by courier*), and a note pad all enclosed in an attractive re-useable satchel; and
- ⇒ seven waves of monthly telephone surveys gauging use, satisfaction, purpose of trips, modes used, (*in one month, what alternate mode they would have used - to gauge environmental benefits of public transport use*) whether they were accompanied, and when they travelled.

- Phase 2 involved:

- ⇒ Advice at the conclusion of the May survey that they would be again contacted in early December about June to November's public transport use;
- ⇒ neither contact by phone nor supply of publicity, and participants were required to use any remaining Multitrip tickets until exhausted when they would buy their own; and
- ⇒ a telephone survey in early December about participants' use of public transport from June to November with the same questions as the monthly telephone surveys about November to May's use of public transport and some additional questions.

Typically, longitudinal studies regularly requiring significant amounts of information from respondents have high levels of attrition. Bearing this in mind, it was anticipated that the sample would reduce from 180 to 100 participants by the end of Phase 1. Due to budget, and internal labour resource constraints, it was not possible to begin with a very large sample. Screenings were conducted with particular patience, realising that capturing a newly screened participant was more expensive than keeping a partially screened prospective participant. We recognised that there was a high risk of losing statistically-significant results the smaller the sample became. The following table shows attrition during Phase 1.

Table 1 - Attrition of Switching to Public Transport Participants
(source: Ryan, 1997a, p 10)

Component	Project Dates	Survey Dates	Sample Size	
			Estimated	Actual
Screening 1 – Non-users?		29 Oct - 7 Nov	300	160
Screening 2 – Able to use public transport for destinations and interested in being participants		8 - 19 Nov	180	180
Commencement	18 Nov 1996		180	175
Wave 1 – Quarterly Ticket	18 - 30 Nov	2 - 8 Dec	180	175
Wave 2 – Quarterly Ticket	1 - 31 Dec	6 - 12 Jan	150	174
Wave 3 – Quarterly Ticket	1 - 31 Jan	3 - 9 Feb	140	168
Wave 4 – Quarterly Ticket	1 - 28 Feb	3 - 9 Mar	130	163
Wave 5 - Multi-trip Ticket	1 - 31 Mar	7 - 13 Apr	120	157
Wave 6 - Multi-trip Ticket	1 - 30 Apr	5 - 11 May	110	157
Wave 7 - No Ticket	1 - 31 May	2 - 8 Jun	100	154
Post Evaluation	-	June	180	167
Post Evaluation	-	November	180	163

A low rate of 'respondent fatigue' ie participants tiring of regular interviewing/diary completion in longitudinal studies, was not experienced in *Switching to Public Transport* participants, and this was attributed to a variety of factors, including:

- questions were limited to public transport trips and not all travel;
- a consistent, limited, and predictable core group of questions were asked, with some additional questions in the three latter waves with no survey taking longer than 30 minutes to answer;
- the same nine-member team of Surveys Australia interviewers contacted participants throughout the screenings, and eight telephone survey waves, (given a briefing prior to commencing interviewing on the peculiar needs of each wave) advising participants when they would next reach them. (The rapport was so established that participants would phone several days before to ask if the interviewer could call at an alternative night and time because another social engagement would cause them to be out on the nominated night!); and

- a high contact rate was achieved because interviewing was carried out over three nights - if the interviewer could not reach the respondent at the nominated night, there were as many as two alternate nights to reach the respondent and gain their answers for that wave.

Personalised communications was a priority throughout the project:

- PTB, and TransAdelaide Lonsdale staff together delivered the material at the door of those receiving personal representation;
- Our Trainee and the Project Manager's business cards, as participants' primary and secondary contact officers were provided in the delivered portfolio;
- Each participant was provided a Personal Identification Card to accompany them on their travel in case a Ticket Inspector queried the use of the non-transferable quarterly ticket;
- Officers of the InfoLine and the Passenger Transport Information Centre linked in an information loop to the Trainee and Project manager about participants' complaints and commendations, which, in turn, was supplied to The Market Research Company;
- TransAdelaide Lonsdale and TransAdelaide corporate marketing representatives were invited to attend the presentation of each survey wave's results.

The cooperation and in-kind contributions of TransAdelaide Lonsdale has been valuable. Similarly, a *Switching* follow-up study, should it proceed in 1998/99, will again be important to the project's success.

Target Market Identified

Phase One

In June, 1997, data from the seven waves of monthly surveys from November, 1996 to May, 1997 was analysed to determine what socio-demographic target markets emerged from the 88% who had tried public transport. No statistically-significant findings emerged.

Participant Groupings by Take-Up: The following five groups were identified from which further analysis took place:

- 17% were *consistent users* ie used public transport one or more times each month after their first month;
- 32% were *frequent users* ie used public transport one or more times in each of four or more months;
- 22% were *infrequent users* ie used public transport one or more times in each of two or three months;
- 17% were *once only users* ie used public transport one or more times in one month only; and
- 12% were *non-users*.

Socio-demographic characteristics: Based on these segments significant socio-demographic characteristics emerged as consistent and frequent users. These participants were significantly more likely to be:

- male;
- older participants, excluding those over 65 years of age; and
- not in paid employment.

There was no difference between males and females in sampling of public transport. Females made up 65% of the sample and 64% of those who tried public transport were female.

Geographic Characteristics: There was no statistically significant relationship between where participants lived and their take-up of public transport despite significant differences between public transport service levels in the twenty suburbs in which they lived. Aggregating data to five regions still did not reveal a statistically significant finding.

Personal Representation: There was no difference in take-up of the use of public transport by those who had received personal representation. There is full confidence that the administrative handling, and the presentation of TransAdelaide Lonsdale and PTB representatives was of a high standard to fully test the capability of this feature to have a positive effect on take-up.

Driver's Licence: Whilst 92% of participants had a driver's licence, checks were made to see if the "captive" prospective customers without driver's licences revealed any differences in behaviours to other participants. No statistically significant differences emerged.

Phase 2

Converts: Additional analysis was undertaken for future target marketing. *Conversion* was highest amongst those:

- 55 - 64 years old ;
- seeking employment; and
- retirees

Women 55 - 64 years-of-age, identifying their occupation as home duties, emerged as a secondary target market.

The Size of the Target Market: Conventional market strategy would cause a competitor to seek growth in market share by gaining customers from the market leader. The market leader is private car use with driver as the sole occupant which has 54.3% of the market for travel to work and education (refer Figure 1) as at October, 1997. Commissioned by the PTB, McGregor Marketing conducted a survey of 1531 respondents in June, July, and August, 1997 which revealed the characteristics of people and their frequency of public transport use.

For the target market of male 55 - 64 year olds who infrequently use public transport, the following data is revealed in Table 2.

Table 2 - Estimated Adelaide metropolitan target market for conversion to public transport (sources: Dunstone, 1997, ABS Census 1996)

Frequency of Public Transport Use	% Response in 6 - 9/97 McGregor Omnibus Survey	Extrapolation from ABS Census '96 Data Within PTB-serviced Adelaide metro area to Estimate 55 - 64 y.o. males Not in paid work
>2 - 3 times per month	9%	2 229
2 - 3 times per month	7%	1 733
About once per month	16%	3 963
2 - 3 times per year	14%	3 468
About once per year	5%	1 239
Less Often	9%	2 230
Never	40%	9 908
Estimated Total Target Market	68%	16 845

When the *Switching to Public Transport* results are extrapolated to the general population, a prospective estimated additional 4 890 consistent users (*9 consistent users/31 participating 55 - 64 y.o. males not in paid work* ie 29% of 16 845), and a prospective estimated additional 11 960 frequent users (*16 frequent users/31 participating 55 - 64 y.o. males not in paid work* ie 51.6% of 16 845) could be added to the public transport customer base.

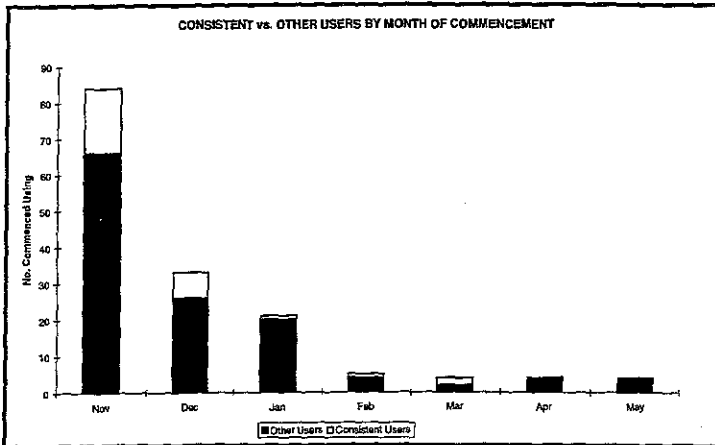
Impressions and Attitudes of Participants

Very important additional findings were gained from people becoming acquainted with public transport. Initial impressions are very valuable pieces of information which can be used to tailor features and appearances to prospective customers to feel sufficiently comfortable with what is offered to become more frequent customers.

Impressions of the Project By Would-Be Consistent Users: The capacity of the *Switching to Public Transport* programme to motivate participants early to try using public transport bore success in gaining consistent users.

When They Started Using Public Transport: Figure 3 illustrates when participants first tried public transport that was later identified as consistent users.

Figure 3 - Month in which consistent users first tried public transport November 1996 - May 1997 (source: Ryan, 1997a, p 10)



Participants' intentions to use public transport were revealed in Tables 3 and 4. Positive word-of-mouth, and pacesetter attitudes on their recognition of the environmental benefits of using public transport are invaluable in converting people to become *consistent users*. This cannot be overstated as an investment for patronage increases.

Table 3 - Intended future use of public transport June (source: Ryan, 1997a, p 79)

Intended Future Use of Public Transport By Segment	Consistent User	Erratic Freq User	Erratic Infreq User	Once Only User	Non User	Total
June 1997	(n=29)	(n=56)	(n=33)	(n=27)	(n=19)	(n=164)
Yes	97%	96%	79%	89%	47%	86%
No	-	2%	15%	4%	42%	9%
Don't know	3%	2%	6%	7%	11%	5%
Total	100%	100%	100%	100%	100%	100%

Table 4 - Intended future use of public transport November (source: Ryan, 1997a, p.79).

Intended Future Use of Public Transport By Segment	Consistent User	Erratic Freq User	Erratic Infreq User	Once Only User	Non User	Total
November 1996	(n=28)	(n=52)	(n=33)	(n=29)	(n=19)	(n=161)
Yes	100%	92%	61%	48%	42%	73%
No	-	-	18%	24%	42%	13%
Don't know	-	8%	21%	28%	16%	14%
Total	100%	100%	100%	100%	100%	100%

Intended future use of public transport: The decline in the intended future use of public transport from 86% in June and 73% in November is noted. It is hypothesised that it may be attributable to the withdrawal of personalised attention that mailouts, and telephone interviewing gave. It may be worthwhile in a follow-up *Switching* project to gauge intended future use of public transport twelve months after the conclusion of the programme to determine what further slippage may occur.

Positive Word-of-Mouth: There was a significant positive correlation between participants' frequency of usage of public transport and their propensity to recommend public transport to others. In particular, the greater the frequency of usage, the higher the probability that the participant had recommended public transport to others. This valuable word-of-mouth means there is a spin-off effect in gaining additional patronage from friends, acquaintances, and travelling companions of *Switching* participants.

Environmental Benefits: There was a significant relationship between participants who said their use of public transport was influenced by environmental concerns and the frequency with which participants used public transport during the life of the project. In particular, consistent and frequent users were significantly more likely to say they were influenced by environmental concerns than infrequent, once only or non-users of public transport. Further analysis of the data, based on those participants who continued to use public transport after the project formally concluded in May, revealed a statistically significant difference between participants who continued to use public transport and their attitude towards the environment. Overall, 60% of participants who continued to use public transport said they were influenced by environmental concerns, compared with 25% of participants who did not use public transport who said they were influenced by environmental concerns.

Consequently, it becomes clear that there is a strong relationship between participants' attitude towards the environment and their subsequent usage of public transport, both during and especially after the project

During April, 1997, participants were asked to record what alternate mode of transport they would have used had they not travelled by public transport. 90.9% of respondents said car, exclusively. Allan Perkins, Manager, Research and Planning, James Sharley analysed relative energy consumption according to a model utilised in his Ph D on Adelaide household energy consumption patterns. If the switching pattern achieved by the project participants were extrapolated to the population, energy savings in the order of 60% would be realised from the use of public transport, with 58% reduction in greenhouse gas emissions.

Children Standing for Adults: There was also a significant positive correlation between participants' frequency of usage of public transport and their belief that children should stand for all adults. In particular, the greater the frequency of usage, the higher the probability that the participant thought children should stand for all adults. Conversely, the lower the usage of public transport the more likely the participant thought children should stand for the elderly, frail and disabled only. A subsequent study was carried out on this issue, and additional attention is expected to be given to youth courtesy and safety on public transport.

Important Features Related to New Customers' Satisfaction: The features customers ranked as most important in affecting their satisfaction changed as they became more acquainted with the public transport system. Table 5 lists the factors of greatest importance in the two months this question was asked.

Table 5 - Leading factors affecting customer satisfaction

Ranking	June, 1997	November, 1997
1	Safety officers on board at night	Safety officers on board at night
2	Ability to read timetables	Provision of shelters at bus stops
3	Provision of shelters at bus stops	Frequency with which services are run
4	Children standing for adults	Safety officers on board during the day
5	Daytime Safety officers on board	Children standing for adults

Throughout the project, participants regularly mentioned drivers, particularly in relation to their courtesy and, to a lesser extent to participants' perceptions of safe driving in the reasons for providing a high or low satisfaction rating for their use of public transport overall. On-time running is a typical industry performance measure. It was far less often given than a courteous driver by participants as a factor affecting overall customer satisfaction. In June, participants were asked to make this choice:

If you had to choose between services running on time or a good driver, which would you prefer? Table 6 reports the answers given by participants

Table 6 - Choice between on-time running and good driver
(source: Ryan, 1997b, p 106.)

Personal Preference (n = 147)	Consistent User (n = 29)	Erratic Frequent User (n = 56)	Erratic Infreq User (n = 33)	Once Only User (n = 27)	Non User (n = 2)	Total (n = 147)
Service Running on Time	20%	26%	39%	29%	-	28%
Good Driver	80%	74%	61%	71%	100%	72%
Total	100%	100%	100%	100%	100%	100%

Multi-Modal Travel: Whilst not statistically significant, there was a minor increase in the number of participants who travelled multi-modal as the project progressed, using park-and-ride facilities with train, "Transit Link" express bus services, or bus and train combinations. Given security concerns, and the general industry impression that there is customer resistance to transferring, three important items of data were captured:

- preparedness to wait for connecting services (refer to Table 7);
- changes over time to the number of accompanied versus unaccompanied trips; and
- the incidence of multi-modal travelling and future intentions to travel multi-modal (refer Table 8).

Table 7 - Time prepared to wait for a connecting service
(source: Ryan, 1997b, p 104).

Time Prepared to Wait for a Connecting Service (n = 147)	Consistent User (n = 29)	Erratic Frequent User (n = 56)	Erratic Infreq User (n = 33)	Once Only User (n = 27)	Non User (n = 2)	Total (n = 147)
< or = 5 mins	31%	25%	40%	15%	100%	29%
6 - 10 mins	45%	52%	36%	59%	-	48%
11 - 15 mins	10%	11%	18%	22%	-	14%
16 - 20 mins	7%	3%	3%	4%	-	4%
21 - 30 mins	-	-	-	-	-	-
>30 mins	7%	9%	3%	-	-	5%
Total	100%	100%	100%	100%	100%	100%

The ratio of accompanied to unaccompanied trips gradually altered as the project progressed in favour of unaccompanied trips (Nov 54%, to May with 73%.

Multi-modal usage and intentions to travel multi-modal in the future indicates a sense of confidence in the system within the Outer South. Table 8 demonstrates that bus/bus, bus/train, car/bus, and car/train are the four combinations participants are able and willing to be transported to the Adelaide Central Business District, work locations, and most shopping centres in the vicinity.

Table 8 - Multi-modal public transport travel and intention to travel
(source: Ryan, 1997a, p 95.)

Multimodal Description	June 1997 % used	November 1997 % used	Will use in future %
Bus/bus	39%	42%	89%
Bus/train	47%	42%	88%
Car/bus	35%	35%	96%
Car/train	42%	48%	94%

Purposes of Trips: Excluding April (a month containing school holidays), trips made for work-related purposes generally increased over time (refer Table 9). Possibly greater confidence in the system's capacity to meet time-critical appointments was achieved as the project moved into its sixth month.

Table 9 - Main reason for travelling (source: Ryan, 1997b, p 58)

Main Reason For Travelling	Nov %	Dec %	Jan %	Feb %	Mar %	Apr %	May %	Ave %
Work	17%	19%	19%	21%	25%	18%	29%	21%
Study	4%	1%	4%	6%	12%	8%	8%	6%
Soc/Pers/Rec.	56%	36%	53%	46%	37%	37%	32%	43%
Shopping	23%	44%	24%	27%	24%	37%	30%	30%
Transport Others	-	-	-	-	2%	-	1%	-
Total Trips	100%	100%	100%	100%	100%	100%	100%	100%

Time of Day: A gradual shift in travel times began to emerge toward the end of the project away from interpeak in favour of morning and/or student peak (refer Table 10). However, consistently, *Switching* participants made more trips during interpeak (9 00 - 14.59), accounting for 56% of all trips. This fits well with the intent to actively stimulate an increase in public transport usage during interpeak periods when there is excess capacity.

Table 10 - Participants' trip travel times (source: Ryan, 1997b, p 57)

Participants' Records Time Trip Commenced	Nov	Dec	Jan	Feb	Mar	Apr	May	Ave
Week Days Only	%	%	%	%	%	%	%	%
Morning Off-Peak	-	2%	3%	5%	1%	2%	1%	2%
Morning Peak	11%	12%	8%	9%	21%	14%	18%	13%
Interpeak	63%	60%	63%	57%	48%	52%	49%	56%
Student Peak	7%	9%	9%	9%	5%	8%	11%	8%
Afternoon Peak	15%	13%	14%	15%	21%	20%	16%	17%
Night Off-Peak	4%	4%	3%	5%	4%	4%	5%	4%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Weekend use varied from 6% of overall public transport trips in May to 14% in December and January, averaging 11% of overall public transport trips between November through May.

Impact on Revenue: No extensive financial modelling has been done. Estimates have been made comparing outgoings eg the price of printing the complimentary tickets, and the contractor's incentive payment for the participants' boardings from June to November continued for two years, and revenue from ticket sales to those participants and their rate of accompanied travellers. On this basis, it has been estimated that a positive cashflow would be achieved over a two-year period. A follow-up *Switching Project* will bring increased knowledge of who are the most-easily convertible non-users. Investing free ticketing incentives and providing public transport information to the most-easily convertible non-users is expected to recover marginal costs.

Conclusion

Switching to Public Transport has been a successful project in achieving its objectives, restated in the dot points below.

- The demographic characteristics of converted consistent users have been identified:
 - ⇒ 55 - 64 years old;
 - ⇒ males; and
 - ⇒ not in paid work
- The habits, and attitudes of those who have taken up public transport have been identified:
 - ⇒ took up public transport in first or second month of project if they were to become consistent users;
 - ⇒ recommended public transport to others;
 - ⇒ influenced by environmental concerns;

- ⇒ believe children should stand for adults should all seats be taken;
 - ⇒ preferred good driver to on-time running;
 - ⇒ prepared to wait 6 - 10 minutes between connections;
 - ⇒ increasingly travelled unaccompanied the more familiar they became with the system;
 - ⇒ were satisfied with, and intended to continue to travel, multi-modal;
 - ⇒ began using public transport for social destinations then moved to using it more regularly to and from work; and
 - ⇒ travelled interpeak, with a slight movement toward greater peak use.
- The factors which influence the satisfaction of these new public transport customers are known to be in this priority order:
 - ⇒ provision of safety officers on board at night;
 - ⇒ provision of shelters;
 - ⇒ frequency of services;
 - ⇒ safety officers on board during day; and
 - ⇒ children should be required to stand for adults when all seats are taken.

The statistical reliability of targeting the demographic characteristics of those found in the Outer South as most readily convertible to become consistent users of public transport anywhere in the Adelaide metropolitan area because of the size of the overall sample ie 180, and the peculiar mix of Outer South public transport services offered eg greater than average distance from the Central Business District, feeder buses to train services, largely unsheltered stops, with greater than average walking distances to bus stops because of the circuitous outer suburban road grid means that this discovered target market should serve as a control group in subsequent research to learn more about and test against other high prospect demographic groupings discernible from this study.

Recommendation

That a follow-up *Switching to Public Transport* Project occur in a different service contract area to further refine methodology to achieve increasingly cost-effective direct marketing efforts to convert non-users of public transport to become consistent and frequent users of public transport.

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Views expressed in this paper remain the responsibility of the author only.

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