

2007 Market Research Summary



INCREASING TRANSIT RIDERSHIP

MARKET RESEARCH SUMMARY

YRT/Viva Awareness and Perceptions are Improving

Awareness of YRT, Viva, TTC and GO Transit among both riders and non-riders is now almost universal. Non-riders indicated that there is 99% awareness for YRT and 100% for Viva. Awareness for Viva has increased since the post-launch research completed in November 2005 where awareness was 83%.

In order to establish both rider and non-rider knowledge of transit service attributes, respondents were asked to indicate awareness from a list provided. The three highest-ranking service attributes among riders were connections to TTC, two-hour transfer and one fare for YRT and Viva.

For non-riders, the greatest awareness was the connections to TTC, one fare for YRT and Viva and frequent service. The fall research for non-riders was also the greatest awareness for the two-hour transfer. Lower rankings included connections to GO Transit for only 50 cents and Express bus services on the 407.

Awareness of specific features among non-riders is relatively high, suggesting that communication and marketing initiatives such as the 'Hop On Hop Off' campaign for the two-hour transfer are breaking through and meeting their objectives.

What Would Increase Transit Usage?

The survey also asked riders and non-riders under what circumstances they might consider using public transit in York Region or use it more often. The highest ranking factors included, poor weather conditions (snow days) - 38%, evening/weekends for special events - 38% and more convenience (frequency, dedicated lanes) - 30% YRT and 10% Viva.

Riders and non-riders rated the importance of ten items that would make up an ideal public transit service. Rider convenience continues to be the main driver of an ideal system followed by bus frequency, on-time service, knowing the 'next bus' time and connections to other transit services. Each of these rated most important at over 50%.



HOP-ON, HOP-OFF CAMPAIGN

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What are the Ideal Information Sources?

Transit information can be obtained from several different sources for both riders and non-riders. The research asked respondents where they were most likely to obtain transit information. The areas that received 'most important' were the schedule information at stops, automated schedule information by phone and automated trip planning on the website. The route map and call centre also scored over 60% for important information sources.

Results indicate that the types of sources YRT/Viva offers for route and schedule information are well-liked. One area of improvement would be schedule information at YRT stops. This is being addressed in 2008 as part of a new SMS project that would allow customer to a text directly to their cell phone for next bus information at any location.

Advertising and Promotion

Making a Breakthrough

Spring market research looked at the current advertising and promotions that were recently in market. This included light pole banners, 'hop on hop off' campaign, student 'connect' campaign and '50 cents to GO Transit' campaign. Respondents recalled ads or promotions that were repeat exposure including light pole banners, mall posters and ads on the bus exteriors. This follows the advertising principle that repeat exposure increases recall of advertising.

Response from the qualitative research indicated that campaigns that messaged individual benefits of riding transit were the most effective in encouraging trial. This type of feedback was incorporated into the next series of campaigns and advertising.

In the fall round of research, two campaigns were tested for awareness and perceptions which included the 'Go Green Ride Blue – clean air day' campaign and the 'One System, One Fare' campaign.

Riders appear to understand the message behind the 'One System, One Fare' campaign, suggesting that the campaign was successful in delivering the intended one-system message.

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BENEFITS FOR TARGET GROUPS

Over 80% of respondents felt the main message was somewhat to very important. The overall reaction strongly resonated with riders, with at least half agreeing that it grabs attention, they like it, it imparts learning, leaves a positive impression and would lead to increased usage.

Riders also understood the primary message behind the 'Go Green, Ride Blue' campaign. The key message was that transit is environmentally-friendly, followed by you could win prizes or a contest. This campaign also resonated highly with riders, especially Viva riders, where 98% liked the campaign and 94% indicated it would encourage increased use of transit.

Key Learning That Will Influence the 2008 Marketing and Communications Plan

Promote the convenience of transit. For example, winter driving conditions and frequency of Viva services.

Promote individual benefits to target groups. Examples, schedule information at stops through your cell phone, trip planning on the website, 24/7 schedule information by phone, discounted bulk transit pass purchases to businesses, student transit ambassadors in every high school.

Better education opportunities. Fare Guide for YRT/Viva, special transit services including 50 cents to GO train stations, Express services on the 407ETR and high school special services customized to the school times.

Increase repeat exposure for marketing campaigns and messages to improve retention and recall.