

An Evaluation of the Role of Marketing in Public Transit Organizations

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Abstract

This study was designed to examine the role of marketing in public transit organizations from a management perspective. Using a survey methodology, a national survey was conducted with a sample of 820 managers and individuals from a variety of specialized transit organizations across the United States. Twenty-three percent of the survey sample responded. Of this total, 43 percent were managers in public transit organizations, with the remainder being from a variety of specialized transit organizations. A majority of the nonmanager group was comprised of government transit entities.

The findings suggest that some marketing departments are not a standard part of a transit firm's organizational structure, and the department may be relatively small. There may be budgetary constraints also. In addition, even though the employees with marketing responsibilities are generally well educated and have several years of transportation industry experience, they may still have misperceptions about the role of marketing in the company.

Introduction

The utilization of public transit has declined steadily in the United States and government officials and public transit managers across the country are in search of ways to increase the use of existing systems support for new services to reduce urban traffic congestion and air quality deterioration. Public transit organizations have belatedly recognized the importance of marketing after enhancing the operational efficiency of their systems. The strategic importance of the marketing function has received the increasing attention of public transit managers and the industry is increasingly becoming market oriented.

Little documented evidence exists relative to the marketing activities employed by public transit organizations. Information concerning the educational background of those responsible for the marketing activities of transit organizations is nearly nonexistent. A review of the perceptions of public transit managers relative to the effectiveness of specific marketing tactics and strategies is also needed. In addition, the desire of public transit managers for more marketing information and training is lacking. The goal of this study is to investigate the marketing resource needs of this important and largely beleaguered industry.

The three primary objectives of this research are to:

- 1 Assess the current utilization of marketing methods,
- 2 Determine specific marketing educational needs of transit managers, and
- 3 Identify how educational centers can assist in satisfying these needs.

Background

As we move into the 21st century, we find that the role of public transit in the United States is in a steady decline. The fact that the perception of public transit as a viable commuting option has experienced such a serious erosion is even more significant given the traffic congestion and air quality problems inherent in many urban areas. Public transit's overall share of the commuting market has declined from 3.6 percent in 1969, to 2.6 percent in 1983, to 2.0 percent in 1990 (Khattak, Noeimi, and Al-Deek 1996; Pisarski 1992). This loss of market share is even more dramatic for work commutes where public transit's share has declined from 12.6 percent in 1960 to 5.3 percent in 1990 (Khattak, Noeimi, and Al-Deek 1996; Ball 1994). The most dramatic evidence of the difficulty public transit has in attracting and retaining riders can be found in metropolitan areas where its market share

declined by 24.9 percent from 1980 to 1990, while the total number of commute trips made by Metropolitan Statistical Area (MSA) residents increased by 20.5 percent (Kemp, et. al 1997).

In spite of the need for innovative marketing-based solutions, comparatively little attention has been directed by public transit agencies at developing new approaches to these problems. Part of the explanation may reside in either the inadequate marketing training and experience of public transit managers, or a simple lack of an appreciation of marketing approaches to the solution of these problems. Or, the explanation might incorporate both issues.

The intent of the research described and summarized below is to examine the marketing efforts of the public transit industry. The overriding purpose of this research is to provide a benchmark to guide the design of possible solutions to the problems faced by this important industry.

Research Design

To enhance the managerial relevance of the instrument used in the current study, public transit managers were involved in each step of the development process. The initial set of questions was developed through a review of the academic and popular press literatures and the input of public transit managers. Transit managers reviewed the survey instrument to ensure its relevance and completeness. Modifications were made based on that review.

The sample frame was drawn from the membership of the American Public Transit Association and the Association for Commuter Transportation. A random sample of 1,000 was generated from the two membership lists. The data was then collected over a six-week period.

Response Rate

Of the 820 deliverable surveys (180 were returned as undeliverable due to an incorrect address or the addressee having changed jobs), the 186 completed surveys represent a response rate of 23 percent. Given the length of the instrument, and the fact that the respondents were not prequalified (i.e., their participation was not sought before the survey was delivered), this is acceptable and quite typical for this type of research. Thus, it appears that there are no significant problems with either the sampling process or the actual sample.

Respondent Characteristics

Organizational Type

Forty-three percent of the respondents (n=81) are from public transit agencies; the remaining 57 percent (n=105) are classified as specialized transportation agencies. The vast majority of the public transit agencies (59 of the 81) classify themselves as bus-only organizations. Those so classified are dispersed across what might be termed small, medium, and large-size fleets in near equal numbers. Of the remaining firms that classified themselves as public transit agencies (n=22), 1 describes itself as a heavy rail organization, 2 are commuter rail organizations, and 19 are multimodal.

Of the 105 specialized transportation agencies, the greatest number (n=39) classify themselves as transportation/van pooling/rideshare organizations. Twenty-three of the respondents indicate that they are employed by a local, state, or federal department of transportation, while 22 work for a transportation management association. The remaining 11 agencies are widely varied in their classification.

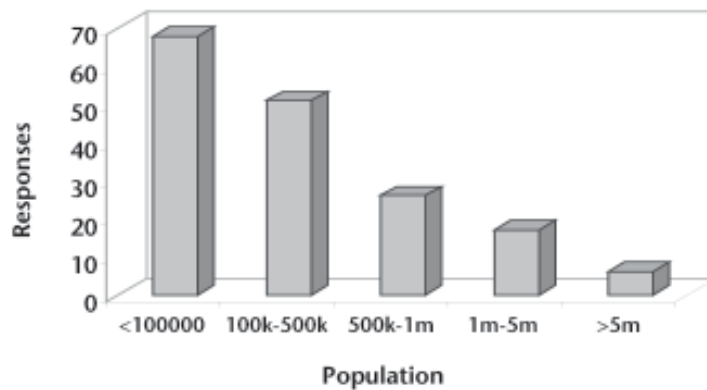
Figure 1. Description of Respondents



Population Size of Area Served

Forty percent of the respondents (n=74) are from organizations that serve populations of 100,000 or less. Another 30 percent (n=56) are from organizations serving areas in excess of 100,000 but less than 500,000; 15 percent (n=28) represent organizations whose market area has between 500,000 and 1 million individuals; 10 percent (n=21) are from areas of between 1 and 5 million; and 4 percent (n=7) have more than 5 million people in their market area. Thus, the sample represents a cross-section of the areas served by transit systems in the United States.

Figure 2. Distribution of Respondents Based on Population



Physical Size of Area Served

The greatest number of respondents (31 percent, n=58) came from areas of 100 square miles or less. An additional 23 percent (n=43) represent organizations that serve areas of more than 100 square miles, but no more than 500. The remaining respondents were scattered across larger areas. The data thus indicate that areas of all sizes are represented in the sample.

Organizational Structure

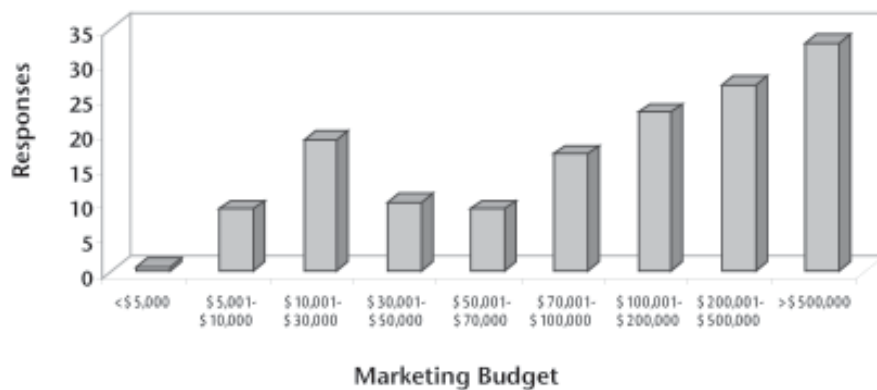
Slightly more than half of the respondents (51 percent, n=95) indicate that their organization has a marketing department. Of those with a marketing department, over half (51 percent, n=48) report having 1 to 3 full-time employees and 81 percent (n=77) report having a full-time staff of 10 or less. Nearly half (48

percent, n=46) of the respondents who report that their organization has a marketing department, indicate that they do not have part-time employees in the department. Of those organizations that report having part-time employees (49 percent, n=47), 46 percent (n=44) report having 1 to 3 employees. Thus, the evidence suggests that marketing departments are (1) not a standard part of the organizational structure of transit organizations and (2) small. This is supported by the fact that the majority of the respondents (63.5 percent, n=118) hold the opinion that their organization does not have enough personnel focused on marketing activities.

Marketing Budget

Interestingly, responses to the survey indicate that a true dichotomy exists relative to the funding of the marketing efforts of transit organizations. More than half of the respondents (51 percent, n=95) indicate that their organization's budget for marketing is in excess of \$100,000, while 20 percent (n=37) report a budget in excess of \$500,000. However, almost 29 percent (n=54) suggest that their budget is \$30,000 or less. While this does not represent a true feast-or-famine situation (a marketing budget of \$100,000 can hardly be considered a feast), it does suggest that public transit organizations can be accurately classified as either active or reluctant marketers.

Figure 3. Annual Marketing Budget



The Marketing Position

Eighty percent (n=148) of the organizations represented in the sample do not have a position that can be accurately described as a Director of Marketing. Of the organizations reporting that they do not have a top-level managerial position devoted to marketing, nearly half (47 percent, n=69) note that one individual is assigned responsibility for the firm's marketing efforts as a secondary task. Almost as many of the firms (44 percent, n=65) report that marketing responsibilities are spread across various individuals.

Figure 4. Is There a Marketing Director?



The fact that the majority of the organizations report that their organization does not have a top managerial position devoted to marketing is indicative of the lack of recognition afforded marketing within the transit industry. The relative high number of organizations that report the responsibility is dispersed across numerous individuals gives further evidence of the failure of transit organizations to fully embrace marketing as a necessary part of their managerial activities. It also provides evidence of their need for additional marketing education.

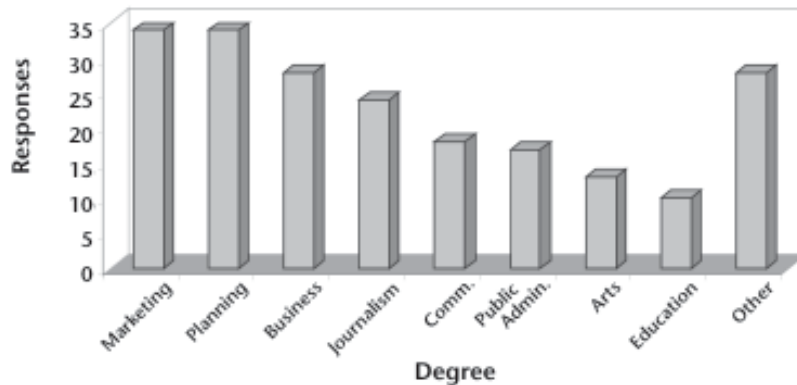
Educational Background

Survey responses indicate that 92 percent of the individuals deemed to be "most responsible for marketing..." have at least a four-year college degree. Of those

having a degree, 41 percent received their degree in marketing or a related field (business or management). This suggests that those individuals responsible for the marketing activities of transit organizations are well educated. However, when combined with the findings relative to the lack of recognition afforded the position within the organizational structure, the results indicate that public transit marketing managers need help in educating other transit managers as to the relevance of marketing within the transportation industry. The data also does not specify whether the formal marketing education of the director was adequate for the position.

The survey responses also show that the vast majority of the individuals responsible for public transit marketing efforts have participated in (1) professional development seminars (83 percent) and (2) university-level marketing courses (65 percent). A significant number (36 percent) have also participated in post-graduate marketing courses. These results add support for the aforementioned conclusions and point to the receptivity of public transit marketers to continuing education efforts.

Figure 5. Education of Persons Responsible for Marketing Activities



Experience

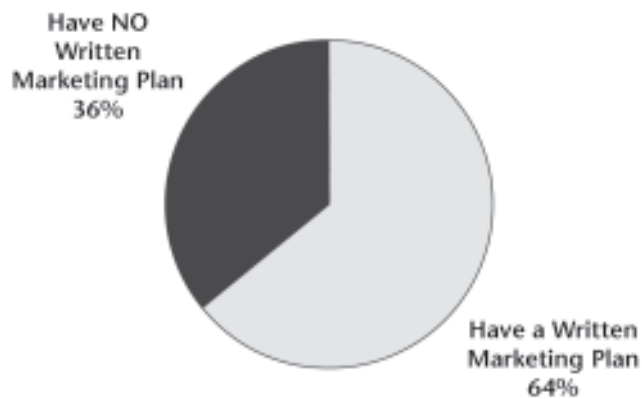
Survey results reveal that 39 percent of the individuals performing marketing activities in public transit organizations have more than 10 years experience in marketing. Another 24.5 percent have between 7 and 10 years of marketing experience. However, the results also indicate that 40 percent of those responsible for marketing activities have been involved in marketing with their current organiza-

tion for 3 years or less and another 32 percent report 4 to 6 years of marketing experience with their current organization. When combined, these results seem to indicate that public transit marketers have significant marketing experience, but only a portion of it is with their current transit organization. This may indicate that marketers are being recruited from outside the industry. If this is the case, the need for further industry-specific or in-house marketing education becomes more obvious.

The Marketing Plan

Almost two-thirds (64.5 percent, n=120) of the respondents indicate that their organization has a written marketing plan. Of those whose organization has a marketing plan, 85 percent (n=102) state the time horizon of the plan is one year or less. A number of the organizations (33 percent, n=40) review their plan annually, although the number reviewing the marketing plan on a quarterly basis is similar (27 percent, n=32). Interestingly, a significant number of the respondents (19 percent, n=23) suggest that their organization does not have a fixed schedule for the review of their marketing plans.

Figure 6. Is There a Written Marketing Plan?



Basis for Segmentation

Respondents are asked to indicate which of a list of multiple segmentation options are used by their organization in their marketing efforts. Usage (heavy users, light user, nonusers) is identified as the most common (76 percent) basis for segmentation. Demographics (age, gender, education, etc.) (59 percent) and geographic measures (trip destinations and origins) (56 percent) are also identified as commonly used segmentation variables. Benefits (e.g., price, convenience, etc.) (48 percent) and psychographics (lifestyle variables) (36 percent) are also mentioned by a significant number of respondents. The frequency of the use of these segmentation variables is evidence of the growing interest in, and sophistication of, the marketing efforts of transit organizations.

Advertising

Respondents indicate that word of mouth is the most commonly used form of advertising (83 percent), followed by direct mail (71 percent), newspaper advertising (66 percent), and public service announcements (62 percent). Interestingly, the results suggest that the respondents feel that all seven of the advertising media identified (television, radio, newspaper, billboards, direct mail, word of mouth, and public service announcements) should be utilized to a greater extent. Differences between current use and should use is particularly dramatic for word of mouth, direct mail, television, and public service announcements. It seems obvious that the respondents feel that public transit organizations should (1) alter their distribution of advertising funds across the various media and (2) increase the overall use of advertising as a marketing tool.

Information Brochures

The survey results suggest that 98 percent of transit organizations currently use information brochures as marketing tools. Interestingly, respondents also indicate that the reliance on information brochures should be increased. The results make a strong case that public transit organizations are doing an adequate job with their marketing efforts, but appear to suffer from a resource allocation shortage.

Public Support and Sponsorship Programs

Forty-three percent of the respondents indicate that their organization currently uses these programs. Again, however, they suggest that such programs should be used more frequently. This is consistent with the aforementioned resource shortage. Greater utilization of sponsorship programs, and other public support could ease the need for resources.

Promotions (General)

On-site information booths are the one of most commonly used forms of promotion. Free rides, specific programs (e.g., monthly passes), and special events are all identified by respondents as being used by more than 50 percent of the transit organizations they represent. However, the results also indicate that the respondents again feel that transit organizations should not rely so heavily on these marketing efforts.

Employer-Based Marketing Efforts (General)

Employer sales calls, employer seminars, and special events are currently used as marketing tools by more than 50 percent of the responding organizations. Once again, however, the data indicate that the respondents feel that these efforts should be used more frequently.

Effectiveness of Current Marketing Activities

Advertising Campaigns

Radio is perceived to be the most effective of the media for advertising campaigns (1.21 on a five-point scale where 1 = effective and 5 = ineffective), with public service announcements the least effective (2.88). In general, advertising campaigns are considered to be moderately effective (2.19). These results indicate a need for public transit marketers to develop a greater knowledge of transit advertising campaigns in general, and radio specifically.

Programs (Overall)

Specific programs (e.g., monthly passes) (1.89 on a five-point scale where 1 = effective and 5 = ineffective) and multiple-use discounts (1.98) are judged to be the most effective of these programs. Overall, these programs are judged to be moderately effective (2.35). Five of the six programs rated as the most effective involve some sort of (discount) price appeal. This suggests a perception among the respondents that price is the major determinant of transit use. It also suggests that transit managers have a limited understanding of the role of marketing (beyond price appeals) and is indicative of a need for further educational efforts.

Employer-Based Marketing Efforts

Overall, employer based marketing efforts are also considered to be moderately successful (2.31). However, none of the specific programs are judged to be particularly effective (a range of 2.27 to 2.34). Creativity in designing more effective

programs is needed and this is an area on which continuing educational efforts should focus.

Importance of Promotional Objectives

Informing commuters about the services offered was considered by respondents to be the most important objective of promotional programs (1.67 on a five-point scale where 1 = important and 5 = unimportant) followed closely by persuading commuters to use their service. Service comparison (comparison advertising) is considered by respondents to be largely unimportant (4.61). Again, these responses are not indicative of a thorough understanding and appreciation of marketing. This suggests a further area of need for potential educational efforts.

Sale of Advertising Space

Forty-two percent of the respondents (n=78) note that their organization sells space on transit vehicles to advertisers. Ten percent report that space on printed materials is sold for similar purposes. This, again, suggests an area where additional training might benefit transit marketers in their efforts to increase revenues.

Customer Comments

Only 39 percent of the respondents (n=73) indicate that their organization has a customer comment box. This suggests that adequate communication links may not have been established between transit organizations and their customers. Again, this is a topic that can be addressed in professional development seminars.

Customer Information Gathering Techniques

In the short term (weekly and monthly), in-person meetings are the most commonly utilized data-gathering technique. More formal research techniques (telephone surveys, on-board questionnaires, and focus groups) are used less frequently (annually or rarely) according to respondents. These results indicate a need for transit managers to develop a better understanding and appreciation of the value of the various customer information-gathering techniques.

Community Committees

Sixty percent of the respondents (n=112) indicate that their organization has formed community committees as a means of gathering customer information. The data suggest that the membership of such groups is relatively diverse. Regular users, local business representatives, and local government officials are the groups most frequently included on such committees. The data indicate that less emphasis is placed by the transit organization on ensuring that all racial, ethnic, and age

groups are represented. Again, the data indicate that this is an area where additional training and educational efforts might be needed.

Perception of Marketing

A series of six questions that represent common misperceptions about marketing are used to assess the accuracy of the respondents' perceptions of marketing management issues. Respondents are asked to indicate their level of agreement with each statement using a scale where 1 = strongly agree and 5 = strongly disagree. The ideal response is a 5. Each statement is reviewed separately.

- The main objective of marketing is to increase revenue

The mean response of 3.26 indicates that, overall, respondents neither agreed nor disagreed with the statement. In reality, the objective of marketing is to identify the needs and wants of consumers and to determine how best to satisfy those needs and wants. Increases in revenues should be an outcome of this process, but not the primary objective. The responses indicate that there is a significant amount of confusion relative to the role of marketing in transit organizations.

- Transportation organizations should design a good, efficient service then convince people to use it.

The mean response of 2.24 indicates a fairly high level of agreement with the statement. Marketing's responsibility is to identify the strategies necessary to provide consumers with what they need and want. The above statement is an example of what commonly is known as a product-oriented approach to marketing; that is, build the best product and consumers will buy it. It is an approach that has been found lacking and indicates a significant misperception relative to the role of marketing.

- Marketing is properly part of the public relations responsibilities of transportation organizations.

The mean response of 2.23 again is indicative of a high level of agreement with this statement. Marketing is simply not public relations, and is not properly part of the public relations responsibilities of transportation organizations. Rather, the opposite is true; that is, public relations are part of the marketing function. Again, this result is evidence of a misperception that transportation organizations should endeavor to correct.

- Market segmentation is not a very useful strategy for transportation organizations.

The mean response of 4.04 indicates a high level of disagreement with this statement, as is desired. The value of segmentation is well documented; therefore, the respondents' responses to this statement are indicative of an appreciation for this important marketing tool.

- Scheduling of service should be a responsibility of marketers.

The mean response of 3.28 indicates that respondents neither agreed nor disagreed with the statement. Scheduling should be based on the needs and wants of transit customers. Therefore, it should be a responsibility of marketers. Again, this result is evidence of a misperception that transportation organizations should endeavor to correct.

- We've got marketing down, but we just don't know how to package our services.

The mean response of 3.88 indicates that respondents tend to disagree with this statement. However, part of marketing is the packaging of services. Complete disagreement is desired so the result can be considered to exhibit some evidence that the respondents do not have an adequate understanding of the role and responsibilities of marketing.

Professional Development Activities

Utilization of Service Firms/Agencies

Marketing consultant/researchers and design firms are identified as the most frequently utilized of the specialty firms, with business/financial advisors the least utilized. In general, the results indicate that transportation organizations frequently make use of outside experts.

Usefulness of Service Firms/Agencies

All of the firms are considered to be more useful than not useful. Design firms, production companies, and marketing consultant/researchers are rated as the most useful.

Willingness to Participate in Professional Development Seminars

The mean response of 1.96 indicates that respondents feel that public transit managers are willing to participate in professional development seminars.

Willingness to Participate if Continuing Education Units Are Offered

The mean response of 3.27 suggests that respondents feel that offering continuing education units for professional development seminars will neither increase nor decrease the willingness of transportation managers to participate.

Preferred Location

The west coast is the most frequently preferred location, but this question is greatly affected by the distribution of the responses. That is, more surveys were sent to the west coast than any other location. Therefore, this preference is not unexpected. The preferred cities are Los Angeles, Seattle, Chicago, New York, Washington D.C., Denver, Phoenix, Atlanta, and Charlotte.

Preferred Time of Year

The responses do not indicate that transportation managers have a preferred time for such seminars.

Perceived Usefulness of Seminar Topics

Marketing planning/strategy is the topic rated as the most useful. Interestingly, all of the topics listed are considered more useful than not useful. Other topics deemed especially useful are employer-based marketing, consumer behavior modification, marketing presentation skills development, and marketing as applied to a specific organization's services. Specifically, such activities as selecting target markets, developing marketing research skills, performing attitudinal and economic impact studies, and performing service evaluations were identified.

Appropriate Daily Fee

The mean response is \$117 per day, but the largest number of respondents (43 percent) indicates that they perceived a fee of between \$51 and \$100 appropriate.

Summary and Conclusions

In a time when increasing the utilization of public transit options is perhaps more important than ever before, we find that there is a huge gap between the marketing knowledge available and its use by public transit organizations. Public transit organizations, as well as more specialized transit agencies, have belatedly recognized the importance of marketing the services they offer. Unfortunately, their marketing efforts are understaffed, underfunded, and underemphasized within their own organizations. Public transit marketers appear competent and highly educated, and they recognize the need for a greater marketing orientation within

their agencies. They also note the need for additional marketing training and education, as well as staffing and financial resources.

Specifically, the findings presented here suggest first that most public transit marketing departments are small. Typically the department has one to three full-time employees and a like number of part-time assistants. Nearly two-thirds of the respondents consider their staffing for marketing activities to be inadequate.

Second, the marketing budget is small. Although 20 percent of the respondents state that their budget was in excess of \$500,000, almost a third have less than \$30,000 to spend on marketing. Obviously, the vast majority of public transit organizations have underinvested in marketing.

Third, 80 percent of the respondents report that their organization does not have a person who carries the title of Director of Marketing. Of the 80 percent, 44 percent report that the responsibility is split between several individuals and most of the remaining respondents (47 percent) indicate that one person manages their marketing efforts, but as a secondary responsibility. Marketing clearly does not receive a substantial level of organizational commitment within many public transit organizations.

Fourth, one of the more positive findings of the study relates to the background of the individual most responsible for marketing in public transit organizations. The overwhelming majority (92 percent) has a college degree with 48 percent having a graduate degree or at least some graduate work. Thirty-eight percent have a degree in marketing or some other business-related discipline. Also encouraging is the fact that 83 percent of the marketing managers have participated in professional development seminars and 65 percent have attended a university-level marketing class.

Clearly, most of the managers directly responsible for public transit marketing have an appropriate background. They also tend to have had substantial experience. Thirty-nine percent have been involved in marketing activities for more than 10 years and 60 percent have been involved in marketing in their current organizations for 4 or more years. Thus, the good news for transit organizations is that they have experienced and well-trained individuals directing their marketing efforts.

Fifth, it also appears that a substantial amount of strategic planning occurs in transit organizations. Sixty-five percent of the respondents report that their orga-

nization has a marketing plan, typically with a one-year or less planning horizon. Forty-two percent of the respondents suggest that their organization review the marketing plan quarterly or more often. While every transit organization should have a strategic plan, the fact that almost two-thirds currently embrace the concept should be encouraging for public transit marketers.

Sixth, in terms of specific marketing activities, most of the respondents report using segmentation strategies (89 percent), with usage being the most common (85 percent) basis employed to segment the transit market. Geographic, demographic, benefit, and psychographic segmentation is also used by a substantial number of public transit organizations. Again, this is evidence that there is some degree of sophistication in the marketing efforts of public transit organizations.

In rating their current marketing efforts, radio is clearly viewed as the most effective marketing tool. Price discounts (multiple-use discounts and monthly passes) are the only other program or activity rated below a 2.0 on a five-point scale where 1.0 = very effective. The two most important objectives of marketing activities are clearly identified as (1) informing commuters about the service offered and (2) persuading commuters to use their services. These are important marketing objectives; however, the responses suggest that transit organizations still do not fully comprehend the breath of marketing responsibilities.

Forty-two percent of the respondents indicate that their organization sells advertising space on their service vehicles, but only 10 percent reported selling such space on their printed materials (schedules, etc.). Thirty-nine percent of the respondents indicate that their organization has a customer comment box. In addition, more than half of the respondents suggest that their organization uses a telephone survey (50 percent) or on-board questionnaires (59 percent) annually or more often. Sixty-percent of the respondents also state that their company has formed some type of community committees to integrate the public into their planning processes. Again, the opportunity for additional marketing applications is clear.

While all of the above indicate an awareness of marketing activities, the responses to the summary also identify a major weakness in the marketing orientation of transit marketers. Specifically, the respondents, who are public transit marketers themselves, are asked to answer a series of six questions where five should elicit strong disagreement and one strong agreement. The questions are designed to assess the respondents marketing IQ—that is, their understanding of marketing.

The mean responses to these questions range from 2.23 to 4.04. Based on these six items, the seventh conclusion is that the respondents do not have a well-grounded understanding of marketing.

The eighth area examined is related to the use of consultants and service agencies by transit organizations. Utilization of service firms and agencies is high especially for advertising, marketing research, and the design and production of promotional materials. The respondents indicate that such firms and agencies have proven useful in their marketing efforts.

The ninth and final conclusion reached is that transit marketers are willing to participate in professional development seminars, whether continuing education units are offered or not. The preferred location for such seminars is a nearby large city—Los Angeles, Seattle, Chicago, New York, Washington, D.C., Denver, Phoenix, Atlanta, and Charlotte are the most frequently mentioned in each of the nine specified regions. No seasonal preference is exhibited.

In terms of topics considered useful, all 17 identified are considered useful to some extent. Those rated the most useful were (1) marketing planning/strategy, (2) employer-based marketing, (3) consumer behavior modification (4/5) promotion and marketing as applied to the organization's services (a tie), (6) targeting, (7/8) marketing research skills and performing target market studies (a tie), (9) performing attitudinal and impact studies, and (10) performing service evaluations. The mean daily fee considered appropriate for such a seminar is \$117.

In conclusion, the survey results suggest that public transit marketers are well-educated individuals with substantial experience who need additional resources to improve their marketing efforts. Specifically, they need larger staffs, larger budgets, and more training. If local traffic congestion and air quality problems are to be solved, the above-mentioned resources are needed. An apparent trend within the industry is that market-oriented transit firms appear to have a growing appreciation of market-based strategies, if not a complete understanding of the practice of marketing. Nevertheless, in all too many instances, the resources needed for successful implementation have not been provided to the transit firm.

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