

Tempe Neighborhood Orbit-Jupiter Circulator WEB Survey

Prepared for:

The City of Tempe
Transportation Division

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I. Introduction

A. Background and Methodology

The City of Tempe's Transportation Division commissioned WestGroup Research, Inc. of Phoenix to conduct a research study with Tempe residents living in the area served by the Orbit Jupiter neighborhood circulator route, namely residents living east of Mill Avenue, west of McClintock Drive and between Apache Boulevard and the US 60.

This report presents the results of a web survey made available to area residents in addition to a telephone study also completed by WestGroup with residents in the targeted area. Since the telephone survey involved a random sample of residents in the area served by the Orbit-Jupiter shuttle, the City felt it was important to offer an opportunity for all residents potentially affected by the circulator service to respond to the survey questions, hence the web survey was publicized as an additional avenue for public input about the Orbit-Jupiter service. This represents the second wave of research conducted with residents living in this area. The first study was conducted in April 2007, before the Orbit-Jupiter neighborhood circulator service officially started. Results will be compared to data collected during the subsequent wave as appropriate.

Prior to the telephone survey, the City of Tempe Transportation Division mailed a postcard to all residents in the area served by the Orbit-Jupiter shuttle that informed residents that a survey was being done in order to garner feedback on the service, as well as inform them of a public meeting being held on April 8th at the Tempe Public Library. Residents were encouraged to participate in the telephone survey if they were contacted, however, they were also given a URL address that would link them to a separate web-based version of the survey. The web link was provided so that all residents would have an opportunity to provide input to the City, even if they were not contacted as part of the scientific telephone study. In addition, residents were also provided a phone number to request a paper copy of the survey if they did not have Internet access. Data from the completed telephone surveys are provided under separate cover.

This report presents the results of 106 surveys that were completed online (n=91) or mailed in (n=15) by Tempe residents. It is important to note that the opinions expressed in these surveys are not statistically representative of the population of Tempe residents living within the area served by the Orbit-Jupiter shuttle because it was an "opt in" study. This means only residents with Internet access and/or a desire to respond by mailing in the survey completed the study, as opposed to the telephone study in which residents were randomly contacted to provide their opinion regardless of their knowledge or interest in the neighborhood circulator program.

Residents were allowed to complete both the telephone and web surveys. However, there was a potential bias in the web survey data due to individual households being represented in both studies; or multiple individuals within the same household completing the web survey. As a result, the databases of the two studies were searched for matching addresses. It should be noted that only 1 person who completed the telephone survey in 2008 indicated they had also completed the web survey and approximately 12 duplicate addresses were found among those completing the web survey.

B. Demographics

Overall, slightly more females than males completed the survey online (57% compared to 43%). As seen previously, those completing the survey online were slightly younger and more likely to be employed full-time; although the difference is less pronounced than it was in 2007. In addition, these residents have lived in Tempe for a fewer number of years and are significantly more likely to have a college degree and a higher annual income than those who completed the phone survey.

Table 1a: Respondent Demographics

| Characteristic | 2008 Telephone (n=407) | 2008 WEB (n=106) | 2007 WEB (n=402) |
|----------------------------|---------------------------|---------------------|---------------------|
| Gender | | | |
| Male | 42% | 43% | 50% |
| Female | 58% | 57% | 50% |
| Age | | | |
| 18-24 | 3% | 3% | 9% |
| 25-34 | 14% | 14% | 25% |
| 35-44 | 14% | 21% | 21% |
| 45-54 | 24% | 25% | 19% |
| 55-64 | 12% | 17% | 18% |
| 65+ | 32% | 19% | 8% |
| Refused | 1% | 1% | - |
| Average Age | 51.7 yrs | 48.8 yrs. | 41.4 yrs. |
| Employment Status | | | |
| Full-time | 43% | 62% | 59% |
| Retired | 32% | 20% | 6% |
| Part-time | 11% | 7% | - |
| House spouse | 6% | 5% | 13% |
| Student | 5% | 6% | 12% |
| Unemployed | 3% | 1% | 5% |
| Length of Residence | | | |
| <2 year | 5% | 4% | 12% |
| 3-5 years | 9% | 10% | 17% |
| 6-10 years | 11% | 13% | 16% |
| 11-20 years | 20% | 28% | 21% |
| 20 years+ | 55% | 45% | 32% |
| Average Length | 27 yrs | 24 yrs | 50yrs |

Table 1b: Respondent Demographics

| Characteristic | 2008 Telephone (n=407) | 2008 WEB (n=106) |
|-----------------------|---------------------------|----------------------------|
| Annual Income* | | |
| >\$20,000 | 7% | 8% |
| \$20-\$40,000 | 18% | 10% |
| \$40-60,000 | 15% | 21% |
| \$60-80,000 | 13% | 8% |
| \$80-\$100,000 | 11% | 12% |
| \$100,000+ | 15% | 20% |
| Refused | 20% | 21% |
| Average Income | \$57,500 | \$61,800 |
| Education* | | |
| Some HS | 2% | - |
| HS graduate | 8% | 2% |
| Some college | 25% | 18% |
| College graduate | 30% | 32% |
| Post graduate | 34% | 48% |
| Refused | 1% | - |

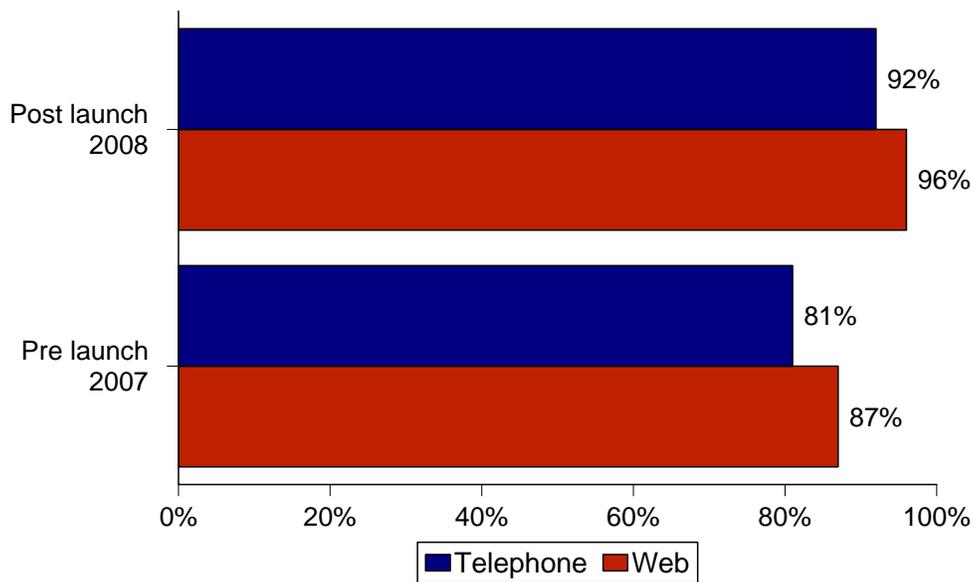
** Not asked of residents in the 2007 survey*

II. Awareness of Tempe’s Neighborhood Circulator

A. Awareness of Program

Unsurprisingly, awareness of the Orbit-Jupiter neighborhood circulator has increased significantly since its launch. While awareness is high among both populations, web respondents continue to be significantly more likely to be aware of the program than telephone respondents.

Awareness of Tempe’s Neighborhood Circulator Program



Telephone: 2008 n=407; 2007 n=402 Web: 2008 n=106; 2007 n=402

III. Neighborhood Circulator Experience

A. Circulator Users

Web respondents are significantly more likely to say that they or someone in their household has used the Orbit-Jupiter service (78% vs. 42%), with the majority reporting they have personally used the service (84%). Both groups indicate that approximately two out of five have a child or spouse who has used the service, while web respondents are slightly more likely to report that a roommate or other family member has ridden the circulator (23% vs. 8%). More web respondents also indicate they had used Tempe transit service prior to the circulator’s launch.

Table 2: Circulator Users

| | 2008 Telephone (n=407) | 2008 WEB (n=106) |
|---|---------------------------|---------------------|
| Used circulator | 42% | 78% |
| Used Circulator | (n=171) | (n=83) |
| Self | 76% | 84% |
| Child | 40 | 42 |
| Spouse | 41 | 41 |
| Roommate | 4 | 13 |
| Other family member | 4 | 10 |
| Used Tempe transit prior to circulator | 53% | 61% |

Q2a: Have you or someone in your household ever used the Orbit-Jupiter neighborhood circulator services?

IF YES in Q2 – Have you or anyone in your household ever used public transit in Tempe before using the Orbit-Jupiter Neighborhood circulator? Q3:

Including yourself, who in your household has used the Orbit-Jupiter neighborhood circulator service? Who else?

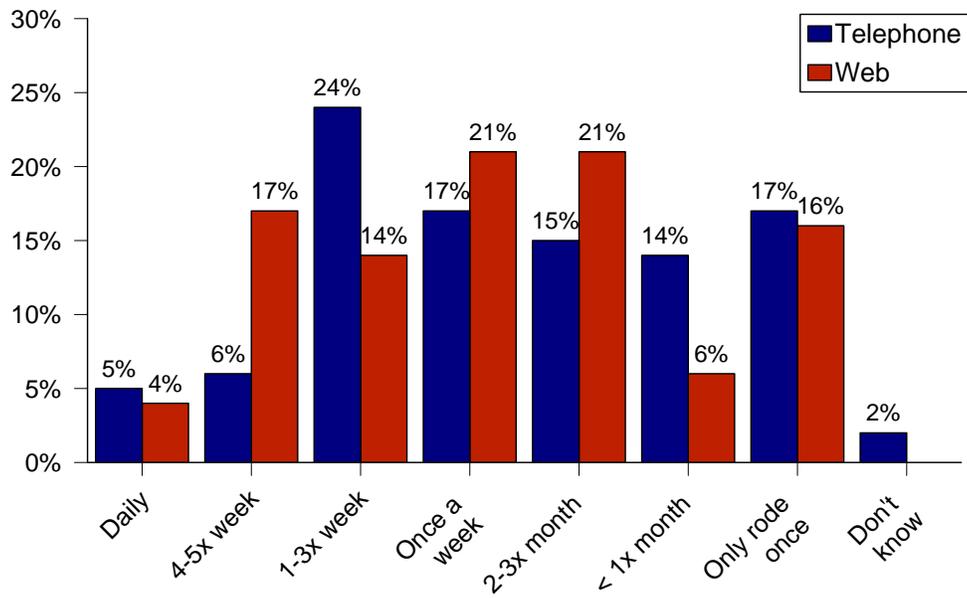
B. Frequency of Use

1. Self

Web respondents are significantly more likely to report that they ride the Orbit-Jupiter mini-bus on a regular basis than those who responded to the telephone study (17% ride 4-5 times per week vs. 6%). In fact, more than half report riding at least once a week (56%).

Orbit-Jupiter Frequency of Use - SELF

Among those who ride the neighborhood circulator



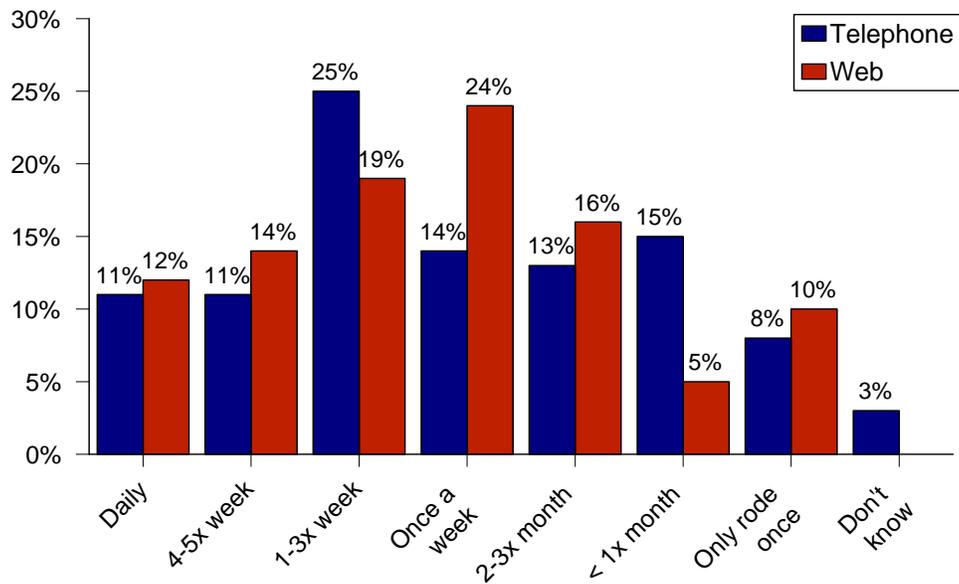
2008 Self Telephone n=126; Self Web n=70

2. Others

Continuing this trend, web respondents indicate that others in their household are also frequent riders (69% riding at least once a week). It should be noted that those completing the telephone study are significantly more likely to report that others in their household ride the Orbit-Jupiter service less than once a month (15% vs. 5%).

Orbit-Jupiter Frequency of Use - OTHERS

Among those who ride the neighborhood circulator

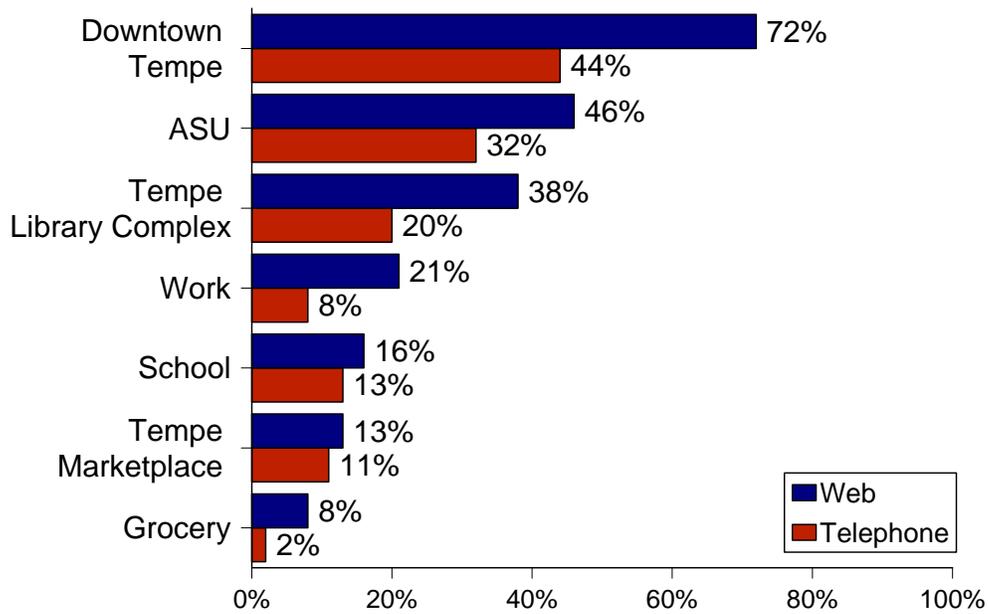


2008 Others in household Telephone n=126; Others Web n=58

C. Circulator Destinations

Across the board, the top Orbit-Jupiter destinations are downtown Tempe, ASU and the Tempe Library Complex. Unsurprising, considering web respondents higher frequency of use, they are also significantly more likely than telephone respondents to cite these destinations, as well as other destinations such as work or the grocery store. Table 3 on Page 10 details the list of destinations provided.

Top Circulator Destinations



2008 Asked of households who use the circulator Telephone n=167; Web n=82

Table 3: Circulator Destinations
 Asked of households who use the circulator

| Destinations | 2008 Telephone (n=167) | 2008 WEB (n=82) |
|---------------------------|------------------------|-----------------|
| Downtown Tempe | 44% | 72% |
| ASU | 32 | 46 |
| Tempe Library complex | 20 | 38 |
| Work | 8 | 21 |
| School | 13 | 16 |
| Tempe Marketplace | 11 | 13 |
| Grocery store | 2 | 9 |
| Multi-Gen Center | 1 | 4 |
| Park | 2 | 2 |
| Post office | 1 | 2 |
| Church | 1 | 2 |
| Restaurant/bar | 1 | 1 |
| Friend's/relative's house | 1 | 1 |
| To see where route went | 4 | - |
| Home | 1 | - |
| Rural & Southern | 1 | - |
| Other | 4% | 6% |
| Don't know | 3 | 2 |

Q5: What is your destination, or where do other members of your household go when using the Orbit-Jupiter neighborhood circulator service? Where else?

D. Circulator Alternatives

While both telephone and web respondents indicate that they most likely would have used a car to make these trips if the circulator did not exist, those completing the web survey are significantly more likely to say they would not have made the trip (23% compared to 1% for telephone respondents).

Table 4: Circulator Alternatives
 Asked of households who use the circulator

| Alternatives | 2008 Telephone (n=171) | 2008 WEB (n=83) |
|------------------------------|------------------------|-----------------|
| Car | 76% | 83% |
| Walk | 17% | 37% |
| Bike | 21% | 36% |
| Would not have made the trip | 1% | 23% |
| Take other bus route | 9% | 19% |
| Ride from friend/family | 1% | 12% |
| Other | 5% | 1% |
| Don't know | 1% | - |

Q8: If the Orbit-Jupiter service did not exist, what mode of travel would you or someone in your household use to make these trips?

IV. Satisfaction Ratings

A. Driver Satisfaction Ratings

The majority of Orbit-Jupiter riders indicate they are satisfied with the bus’s operators (94%). Interestingly, web respondents indicate the highest level of satisfaction with the bus operator’s driving and did not rate them quite as high on helpfulness as did riders interviewed via the telephone survey.

Table 5: Driver Satisfaction
 Asked of those who have used the circulator and have an opinion

| Attribute | Phone NET 4+5 | WEB NET 4+5 | Very Unsatisfied | | | Very Satisfied | | DK* |
|------------------------------|---------------------|-------------------|---------------------|----|----|-------------------|-----|-----|
| | | | 1 | 2 | 3 | 4 | 5 | |
| Bus operator’s driving | 91% | 94% | - | 1% | 5% | 20% | 74% | - |
| Driver overall | 94% | 93% | - | - | 7% | 28% | 65% | - |
| Helpfulness of the driver | 94% | 90% | 1% | 1% | 7% | 24% | 66% | 4% |

Q6: Thinking about trips you have made using the Orbit-Jupiter neighborhood circulator, how satisfied are you with...?

** Don’t know percentages excluded from ratings.*

B. Bus Satisfaction Ratings

Again, most riders report that they are satisfied with the Orbit-Jupiter mini-buses (97%). Web respondents are most satisfied with the bus’s cleanliness (significantly more so than telephone respondents - 92% vs. 82% rating it a 5 “very satisfied”), and gave the lowest ratings for the bus’s on-time performance (84%).

Table 6: Bus Satisfaction
 Asked of those who have used the circulator and have an opinion

| Attribute | Phone NET 4+5 | WEB NET 4+5 | Not at all Satisfied | | | | | Very Satisfied | Don't know* |
|---------------------|------------------|----------------|----------------------|----|-----|-----|-----|----------------|-------------|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| Cleanliness | 94% | 98% | - | - | 2% | 6% | 92% | - | |
| Bus overall | 97% | 96% | - | - | 4% | 18% | 78% | - | |
| Ease of use | 95% | 95% | - | - | 5% | 8% | 87% | - | |
| On-time performance | 82% | 84% | - | 4% | 12% | 28% | 56% | 2% | |

Q7: Thinking about the trips you have made using the Orbit-Jupiter neighborhood circulator, how satisfied are you with...?

** Don't know percentages excluded from ratings & average.*

C. Hours of Operation Ratings

Similar to findings from the prelaunch in 2007, residents who completed survey online are significantly less likely to report satisfaction with the hours that the neighborhood circulator operates than those who completed the survey via telephone (78% providing a 4+5 rating compared to 88%). While telephone respondents are slightly more likely to rate the hours of operation as a “5-very appropriate,” web respondents are significantly more likely to rate them a “3.”

Interestingly, in 2007, prior to the circulator’s launch, 16% of web respondents indicated that the hours for the circulator were “1-not at all appropriate,” while since the circulator’s launch web respondents are significantly less likely to feel this way (5%).

Table 7: Hours of Operation

| Rating | 2008 Telephone (n=407) | 2008 WEB (n=106) | 2007 WEB (n=263) |
|----------------------------|------------------------|------------------|------------------|
| NET 4+5 | 88% | 78% | 76% |
| 5 – Very appropriate | 68% | 57% | 64% |
| 4 | 20 | 20 | 12 |
| 3 | 7 | 16 | 4 |
| 2 | 2 | 2 | 3 |
| 1 – Not at all appropriate | 2 | 5 | 16 |
| Don’t know* | 7% | 3% | - |

Q13: The hours of operation and frequency for the Orbit-Jupiter neighborhood circulator service are every 15 minutes between 6am and 10pm, 7 days a week. How appropriate do you feel that the hours and frequency for your area...?

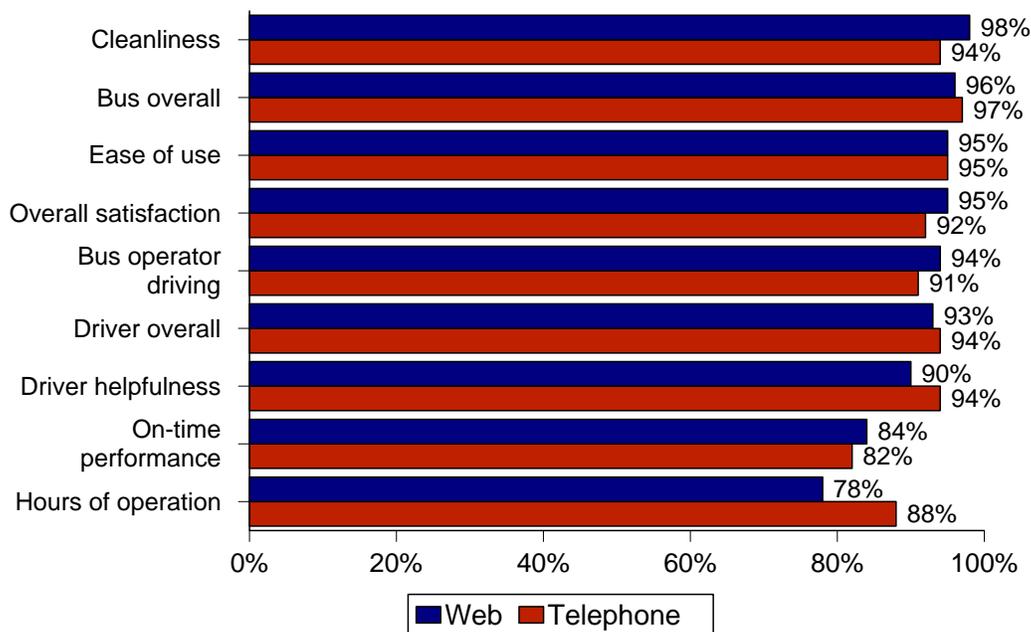
** Don’t know percentages excluded from ratings & average.*

D. Overall Satisfaction

Overall web respondents provide highest satisfaction ratings for cleanliness of the Orbit-Jupiter circulator shuttle, the bus overall, ease of use and overall satisfaction with the service. Telephone respondents rated the bus overall, ease of use, bus operator driving and driver helpfulness most highly. Both groups indicate that the areas of least satisfaction are hours of operation and on-time performance.

Orbit-Jupiter Satisfaction Ratings

Those providing a 4/5 rating on a 5-point scale



2008 Asked of households who use the circulator Telephone n=171; Web n=103

Nine out of ten riders indicate that overall they are satisfied with the Orbit-Jupiter neighborhood circulator service, (92% telephone and 95% web); with the majority indicating they are “very satisfied.”

Table 8: Overall Satisfaction with Circulator
 Asked of those who have used the circulator and have an opinion

| Rating | 2008 Telephone (n=171) | 2008 WEB (n=83) |
|--------------------------|------------------------|-----------------|
| NET 4+5 | 92% | 95% |
| 5 – Very satisfied | 74% | 83% |
| 4 | 18% | 12% |
| 3 | 6% | 4% |
| 2 | 1% | 1% |
| 1 – Not at all satisfied | 1% | - |
| Don't know* | 3% | - |

Q9: Overall, how would you rate your level of satisfaction with the Orbit-Jupiter neighborhood circulator service?

** Don't know percentages excluded from ratings & average.*

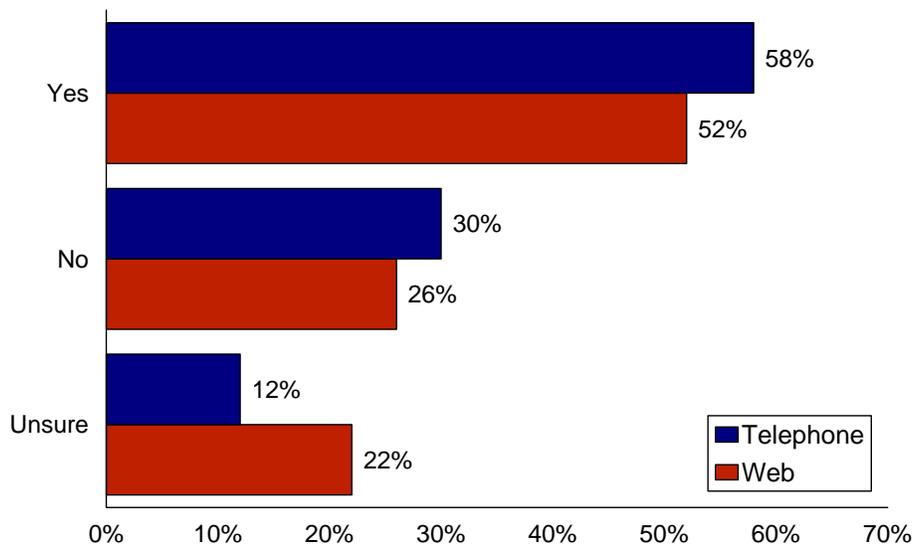
V. Non-Users

A. Plans for Future Circulator Use

At least half of residents who said they had not used the Orbit-Jupiter service indicate that they would do so at some time in the future (52% of web and 58% of telephone respondents).

Future Circulator Use

Do you plan on using the Orbit-Jupiter neighborhood circulator service at some time in the future?



Asked of those who do NOT use the circulator: Telephone 2008 n=236; Web n=23

B. Reasons for Not Using Circulator

For residents who have not used the Orbit-Jupiter service and indicate that they are not likely to do so in the future, the reasons primarily center on a stated preference for driving their own car. Only six individuals who completed the survey online reported resistance to using the circulator, three because they oppose it and two because they do not believe it is safe, and one because they only travel with their pet.

Table 9: Reasons for Not Using Orbit-Jupiter Circulator

| Reasons | 2008 Telephone (n=70) | 2008 WEB (n=6) |
|---|-----------------------|----------------|
| Oppose it | 3% | 50% (3) |
| I have a car/would rather drive | 51% | 33% (2) |
| Safety issues/not safe | - | 33% (2) |
| Would rather bike/walk | - | 17% (1) |
| Our pet travels with the family | - | 17% (1) |
| Doesn't go where I need to go | 16% | - |
| Not familiar with routes/don't know enough about it | 9% | - |
| Route is not close to where I live | 7% | - |
| I live close to where we go | 6% | - |
| Don't go out much | 6% | - |
| I'm too old | 4% | - |
| I'm handicapped/health problem | 4% | - |
| Doesn't run when I need | 1% | - |
| Buses add to traffic | 1% | - |
| Unsure about reliability | 1% | - |
| Don't know | 1% | - |

Q12: Why are you not likely to use the Orbit-Jupiter neighborhood circulator service?

IV. Level of Support for Neighborhood Circulator

A. Support in Their Area

While residents overall strongly support the Orbit-Jupiter circulator in their area, those completing the survey online are significantly more likely to say they “strongly support” the service (86% compared to 75% for telephone respondents). It should be noted that web respondent’s support has increased significantly since the shuttles launch (77% NET support in 2007 compared to 91% currently).

Table 10a: Level of Support for Circulator– IN YOUR AREA

| Level of Support | 2008 Telephone (n=407) | 2008 WEB (n=106) | 2007 WEB (n=402) |
|----------------------|------------------------|------------------|------------------|
| NET Support | 86% | 91% | 77% |
| 5 – Strongly Support | 75% | 86% | 73% |
| 4 | 11% | 5% | 5% |
| 3 | 8% | 2% | 2% |
| 2 | 1% | 1% | 4% |
| 1 – Strongly Oppose | 2% | 7% | 18% |
| Don’t know/Refused | 3% | - | - |

Q14: Do you support or oppose the Orbit-Jupiter neighborhood circulator service in your area, regardless of whether you personally use the service or not?

Table 10b: Reasons for Circulation Opposition – IN YOUR AREA
 Those Rating Support a “1” or “2”

| Reason | 2008 Telephone (n=13) | 2008 WEB (n=8) |
|------------------------------|-----------------------|----------------|
| I have a car/rather drive | 31% (4) | 88% (7) |
| Doesn't run times I need | 8% (1) | 38% (3) |
| Don't live on through street | - | 25% (2) |
| Rather bike/walk | 15% (2) | 13% (1) |
| I use the regular bus system | 8% (1) | 13% (1) |
| I'm too old | - | 13% (1) |
| Oppose it | - | 13% (1) |
| I live close to where we go | - | 13% (1) |
| Buses add to traffic | 15% (2) | - |
| Doesn't go where I need | 15% (2) | - |
| Need a car for work | 8% (1) | - |
| It duplicates public transit | 8% (1) | - |
| Don't go out much | 8% (1) | - |
| Don't know | 8% (1) | - |

Q14a: Why are you opposed to the Orbit-Jupiter neighborhood circulator service in your area?

B. Support on Their Street

Approximately one in five residents report that the Orbit-Jupiter shuttle travels on the street where they live (22% web respondents and 24% of telephone respondents). Of those residents, most are supportive of the service traveling on their street. Support ratings for the circulator service indicate that these residents are less likely to “strongly oppose” the service after seeing it in operation than they were prior to its launch (13% vs. 22%). However, as in 2007, residents completing the web survey were more likely to indicate opposition to the circulator running on their street than those interviewed via the telephone survey (13% vs. 4%).

Table 11: Level of Support for Circulator– ON YOUR STREET
 Asked of those who indicated the circulator travels on their street in 2008*

| Level of Support | 2008 Telephone (n=99) | 2008 WEB (n=23) | 2007 WEB* (n=402) |
|----------------------|-----------------------|-----------------|-------------------|
| NET Support | 87% | 82% | 73% |
| 5 – Strongly Support | 75% | 65% | 68% |
| 4 | 12% | 17% | 5% |
| 3 | 7% | 4% | 3% |
| 2 | 1% | - | 3% |
| 1 – Strongly Oppose | 4% | 13% | 22% |
| Don’t know/Refused | 1% | - | - |

Q15a: Do you support or oppose the Orbit-Jupiter neighborhood circulator mini-buses continuing to travel on your street, regardless of whether you personally use the service or not?

** In 2007, prior to the shuttles launch, the question was asked about support in general and was asked of everyone in Area 2.*

C. Suggested Changes and Improvements

More than one fourth of web survey respondents express satisfaction with the Orbit-Jupiter service when asked to offer suggestions or changes; significantly more than those who completed the survey via telephone. In fact, telephone respondents are most likely to report that they did not have any suggestions (42% vs. 10%).

Top mentions for web respondents include suggestions to extend the route, offer maps, schedules or more signage and more direct routes. Telephone respondents top mentions include extending the route, extending the hours and addressing wait times.

Table 12: Suggestions for Orbit-Circulator Service

| Suggestion | 2008 Telephone (n=167) | 2008 WEB (n=62) |
|-------------------------------------|------------------------|-----------------|
| It's great/happy with it | 12% | 27% |
| Extend the route | 19% | 18% |
| Maps of routes/schedules/signs | 5% | 11% |
| More direct routes | 3% | 10% |
| Have it run earlier/later | 8% | 8% |
| Wait time is too long | 7% | 8% |
| Slow down/drive smoother | - | 8% |
| Run too frequent/buses always empty | - | 7% |
| Friendlier drivers | - | 7% |
| Too much trash/loitering in yards | - | 2% |
| Cancel the service | - | 2% |
| More buses | 3% | - |
| Other | 7% | 13% |
| Don't know | 42 | 10 |

Q10: Is there anything you would change or improve you would suggest for the Orbit-Circulator service? What else?

VII. Comments

Overall, most respondents agree that the Orbit-Jupiter Service is a great idea and a great service. Residents recognize its value for the students, the elderly and those without a vehicle and are hoping that it will help reduce traffic, help with parking, and offer an alternative in light of recent gas price increases.

Web respondents are significantly more likely than those who completed the telephone survey to express appreciation for the service, as well as to offer feedback (44% of telephone respondents did not offer any feedback compared to 5% of those answering via the web). Those completing the online survey recognized the circulator’s value as an alternative to downtown parking and its potential to reduce traffic, and are significantly more likely to suggest that the service should extend its hours and connect to other mass transit. On the other hand, web respondents are also more likely to express negative feedback about the cost of the service for taxpayers.

Table 13: Suggestions for Orbit-Circulator Service

| Suggestion | 2008 Telephone (n=398) | 2008 WEB (n=81) |
|--|------------------------|-----------------|
| Positive comments | | |
| It’s a great idea/great service | 29% | 48% |
| Good for elderly/students/people who need it | 3% | 21% |
| It will reduce traffic | 2% | 9% |
| Will help downtown parking problems | - | 6% |
| Will help with gas situation | 3% | - |
| Operational suggestions | | |
| Extend the hours | 4% | 14% |
| Expand the service/more destinations | 5% | 6% |
| Need more information/maps | 4% | - |
| Won’t come close enough to me | 2% | - |
| I like that its free/keep it free | 2% | 1% |
| Connect to other mass transit | 1% | 4% |
| Too frequent | 1% | 3% |
| Negative comments | | |
| Waste of money/expensive tax use | - | 5% |
| Worried about people it will bring (crooks, transients etc.) | 1% | 3% |
| Other (1% or less consensus) | 21% | 15% |
| Don’t know | 44% | 5% |

Q16: Are there any other comments you would like to share with the City of Tempe regarding the Orbit-Jupiter neighborhood circulator service?