



City of Tempe Transit Survey Report

January 2003

Prepared For:

City of Tempe

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Executive Summary

The City of Tempe commissioned WestGroup Research to complete a telephone survey of Tempe residents in an effort to gain insights into perceptions about public transit, among both riders and non-riders. This report analyzes the data collected by the survey and, where appropriate, compares responses of the residents by meaningful demographic variables, as well as to data from studies conducted in July of 1998 and January of 2001.

Random calls of Tempe residents were made from WestGroup's Interviewing Center in Phoenix, Arizona in the month of January 2003. Households were selected by means of random digit dialing according to Tempe zip codes. The survey was completed with 415 Tempe residents. The margin of error for this sample size is approximately $\pm 4.9\%$ at a 95% confidence level.

Perceptions of Public Transit

- Overwhelmingly, the term "public transit" initially brings images of buses to the public's mind (67%). Other forms of public transit such as light rail, trains, or subways are also frequently called to mind (10%, 6% and 5%, respectively).
- Nearly three in seven (42%) Tempe residents feel the public transit services in Tempe benefit everyone. A majority of the respondents indicated the transit system only benefits certain factions of people, such as those without cars (26%), low-income residents (12%), people who cannot drive (11%), or ASU students (10%).
- Of the ten common excuses people have for not riding the bus, Tempe residents were most likely to agree with the statement that they simply prefer to drive their car (86%). The perception that riding the bus takes too long (67%) and that they need their car for business (57%) was also agreed upon by more than half of those who do not ride the bus.

Potential Use of Tempe's Transit System

- When those who had not ridden a bus in Tempe within the past year were asked if they have ever ridden a bus in the Valley, 37% said that they had (down from 41% in 2001). Forty-two percent (42%) of those who had never ridden a bus in the Valley said they have considered doing so.
- As in 2001, two-thirds of the non-riders believe there is local bus service to and from shopping destinations (66%). Approximately one-half believe they can get to and from school and/or work (52% and 48%, both up ten points from 2001). Slightly fewer think there currently is local bus service to take them to and from social or recreational activities (46%).

- Non-riders were asked to give specific circumstances that would make them consider taking a bus. As in 2001, the strongest consensus (21%) was that if their car would break down, they might consider using the bus. Fewer than one in ten (8%) mentioned the need for an improved system this year (down from 14% in 2001 and 25% in 1998). Non-riders also cited other circumstances of desperation – if they did not own a car (12%), no other transportation available (10%), or if they were unable to drive due to injury or illness (3%).
- Four in five Tempe residents who have not ridden a bus in the past year (80%) say that taking the bus would affect their daily routine. The most frequently voiced concern among non-riders is that they would need more time for travel (45%).
- A majority of non-riders indicated all of the benefits mentioned, except for safety, would be persuasive arguments to get people to use the bus instead of commuting by car (67% to 72% very + somewhat effective). As in the past, the weakest argument was that the taking the bus is safer than driving (51%).
- This year, Tempe non-riders are most likely to use the Internet or pick up the telephone if they want to find information about local bus services. The percentage mentioning going on-line to access information about the bus system has nearly doubled since 2001 (29% up from 15%). Although down slightly from 2001, a high proportion still say they would call Valley Metro (26%) or call the City (20%).
- Residents who had ridden a bus in the past year were asked what they would tell someone if they were asked whether or not they should start riding the bus. The most common response was they would tell people to “give it a try” (36% up significantly from 28% in 2001). The percentage of riders indicating they would tell people the bus provides good service increased seven fold this year (14% up from only 2%).

Rider Characteristics and Opinions

- The percentage of Tempe residents reporting to have ridden a bus in Tempe in the past year has increased significantly since 2001 (36% vs. 29%). Thirteen percent (13%) have ridden the bus more than 10 times in the past year (up from 8% in 2001).
- The percentage of riders who have ridden for more than one month but less than a year decreased to 23% from 41% in 2001. Those riding for more than two years increased significantly to 49% (vs. 29% in 2001).
- Riders are most likely to indicate the reason they ride the bus is because they do not have a car (30%). Similarly, 8% ride the bus because their vehicle is unavailable or getting repaired and 2% do not have a license to drive. One in five (20%) riders say they use the bus because it is convenient.

- As in the past, there are two main destinations that Tempe bus riders are heading for -- work (32%) and shopping (28%). In an increase over 2001, one in five (20%) riders indicate they also use Tempe buses to go to recreational activities (up from 16%). This year fewer riders reported taking the bus to ASU (18% down from 22% in 2001).
- Approximately one-third of Tempe bus riders have taken the bus to Arizona Mills Mall (32% up significantly from 23% in 2001). The purpose of the majority of these trips was to go shopping (83%). As in 2001, the most frequently used routes were the 56 and 77.
- As in the past, the largest proportion of bus riders surveyed say they do nothing other than look out the window while riding the bus (47%). Reading books (27%) or magazines/newspapers (18%) and talking to other riders (14%) are the other most common activities.
- If there were no transit services in Tempe, two in five (40%) indicate they would drive themselves, while 22% report that they would get a ride from someone else. Many would have to call a taxi (13%). One in ten would resort to slower or less convenient transportation methods such as a bike or walking (both at 10%). An additional one in ten (10%) said they would just not be able to make their needed trips if there was no transit service available.
- When they first rode the bus in Tempe, riders were most likely to look for a Bus Book for more information (23%). Asking a friend and calling Valley Metro were the other most popular sources of information (both mentioned by 13%).
- The Bus Book is the main source of information used by current riders to get information about bus schedules (41%). One in ten riders use the Valley Metro information line and the Internet as information sources (both mentioned by 10%). This year, 9% of riders say they get information from route maps at stops.
- Overall, four in five (80%) riders are satisfied with the Tempe bus system (43% very + 37% somewhat). The Tempe bus systems earns its highest ratings for the cleanliness and comfort of the buses (both at 91% satisfied). A strong majority indicates they are satisfied with the safety on the bus (87%). Approximately four in five (78% to 83%) are satisfied with the drivers, ease of using the bus and understanding the schedule and maps, and the on-time performance of buses.

Tempe in Motion

- As in 2001, nearly two in five Tempe residents have heard of "TIM," Tempe's transit, bike, and pedestrian program (39%). Four in seven (57%) of those aware of the acronym "TIM" could state that it stands for "Tempe In Motion."

- Residents who were aware of TIM, were most likely to have become aware through one of five sources –street banners (24%), print advertising (16%), signs on the buses (16%), television (10%), and/or direct mail (9%).
- One-half (51%) of Tempe residents aware of TIM reported they had also seen advertising for TIM. This represents a decrease from 2001 when 60% were familiar with TIM advertising. The most common sources of advertising awareness are television and street banners (each mentioned by 26%). Signs on buses and print ads are also frequently recalled (17% and 15%, respectively).
- As in 2001, almost half of those aware of advertising (47%) could not recall a message. Those who were able to recall a message described ads that promoted “TIM” and “Tempe in Motion” (15% and 6%), using alternate modes (9%), and the benefits of taking the bus (5%). An additional 5% recalled advertisements about the new buses that “kneel” or lower down.
- Four in nine residents aware of TIM advertising indicated the ads made them think more positively about the bus system in Tempe (44% down from 54% in 2001). The remaining residents indicated the ads had no affect on their perceptions (46%) or could not say either way (10% don’t know).

Miscellaneous Issues

- As in the past, residents feel that additional services in Tempe’s transit system should be advertised by using mass media sources. Direct mail and television are the main mediums suggested (25% and 23% mentioned). Additionally, 17% say that residents could be informed of the new service through newspapers and 5% suggested radio as a way to disseminate information.
- Similar to findings from 2001, approximately four in seven Tempe residents have access to a bicycle (56%). Four in nine Tempe residents with bikes ride them at least three to five times a month (44% down from 52% in 2001). It seems that most of the time, bicycles are ridden for the purpose of exercising (59%). Nearly one-third (30%) use a bike to get to work and only 12% use a bike to go to the store.

Conclusions

1. The percentage of Tempe residents using bus service continues to grow. Riders are also taking the bus more frequently and have been using the bus system for a longer period of time. However, half of all riders use the bus only a few times each year, indicating that many residents may be using the service for special events or are “trying it out” in certain circumstances. A reported increase in bus usage for recreational trips and trips to Arizona Mills may be evidence of this “test” of the system.
2. Tempe residents are more positive about the benefits of the bus system than residents in other Valley cities, with more than two in five residents feeling that “everyone” benefits from the transit system. Additionally, this year’s riders were significantly more likely to say they would tell those thinking about riding the bus that they should “give it a try” and that the “bus provides good service.”
3. Tempe riders also are more likely to be choice riders and not transit dependent with close to two-thirds indicating they would have a ready alternative if the bus were not available.
4. Although more non-riders believe there is local bus service available to work, school, and recreational activities than in past surveys, approximately half are still not certain it can get them where they need to go. Elderly respondents, in particular, do not believe there is sufficient bus service to get them to and from destinations.
5. Of interest, two in five non-riders agree they do not ride the bus because they do not know how. The Internet has the potential to help alleviate anxiety over knowing how to use the bus and understanding its routes and schedules. This year nearly three in ten non-riders (double the percentage in 2001) said they would look to the Internet to find out information about riding the bus. If non-riders do look up this information, and it is clear and easy to follow, it could serve to help increase ridership.
6. Finally, advertising awareness decreased over the past year and residents have trouble recalling a clear message outside of general advertising for the system itself. Since there is a strong level of support for the system and a great deal of “sampling” is occurring, focusing advertising efforts on how to use the system and where residents can easily go using the bus may encourage even more people to use the system.

I. Introduction

A. Background

The City of Tempe commissioned WestGroup Research to complete a telephone survey of Tempe residents in an effort to gain insights into perceptions about public transit, among both riders and non-riders. This report analyzes the data collected by the survey and, where appropriate, compares responses of the residents by meaningful demographic variables, as well as to data from studies conducted in July of 1998 and January of 2001.

Random calls of Tempe residents were made from WestGroup's Interviewing Center in Phoenix, Arizona in the month of January 2003. Households were selected by means of random digit dialing (RDD) according to Tempe zip codes. A quota was set to achieve equal representation of men and women. An RDD methodology effectively includes all residential telephone numbers regardless of listing. Newcomer households and as many as 50% of some subgroups are not listed in published directories. The importance of the RDD methodology is in its ability to provide a true random sample of the population.

The survey was completed with 415 Tempe residents. The margin of error for this sample size is approximately $\pm 4.9\%$ at a 95% confidence level. Cross tabulations of the data collected in this survey are included under a separate cover.

B. Demographics

As previously mentioned, half of the respondents are male and half are female. Approximately half (47%) of the residents are married. The average age is 44.2 and the average household income reported is \$57,700. Education levels of the respondents are somewhat higher than found across the Valley as a whole; 82% say that they have had at least some college education. However, this is likely due to the location and influence of Arizona State University. Overall, the sample is very similar to the 2001 and 1998 samples. The table on the following page gives a more detailed summary of these characteristics.

Table A: Demographics

	2003 (n=415)	2001 (n=404)	1998 (n=401)
Gender			
Male	50%	50%	50%
Female	50%	50%	50%
Years Lived in Tempe			
<1 year	8%	10%	8%
1 – 2 years	11%	13%	12%
3 – 5 years	16%	15%	20%
6 – 10 years	18%	14%	17%
11 – 20 years	16%	13%	16%
20+ years	30%	34%	26%
Age			
18 – 34	31%	34%	33%
35 – 49	29%	25%	32%
50+	36%	40%	35%
Average	44.2	44.9	44.7
Education			
Some high school	3%	3%	4%
High school graduate	12%	12%	13%
Some college	26%	40%	36%
College graduate	29%	26%	27%
Post graduate	27%	19%	18%
No answer	4%	1%	2%
Income			
<\$20,000	12%	15%	12%
\$20 - \$40,000	19%	21%	29%
\$40 - \$60,000	18%	18%	19%
\$60 - \$80,000	14%	10%	12%
\$80 - \$100,000	5%	7%	6%
\$100,000+	13%	10%	8%
Average	\$57,700	\$53,500	\$48,600

Nearly one in five (17%) households reported a teenager living there, and of these households with teens, 30% indicated their teenagers use the city bus to get around (down from 46% in 2001).

Access to the Internet and/or email increased in 2003. Five in six (83%) Tempe residents have access to the Internet or at least have access to email (up from 78% in 2001).

In comparison to 2001, the 2003 sample includes more residents in managerial/proprietor and clerical occupations and fewer professionals and craftsman, trade, and labor workers. There were also fewer students interviewed for the current study. However the occupation representation in the 2003 sample are quite similar to the 1998 sample with the exception of the ongoing decrease in the percentage of blue-collar workers (craftsman/trade/laborers).

Table B: Demographics

	2003 (n=415)	2001 (n=404)	1998 (n=401)
Marital Status			
Married	47%	48%	50%
Single	48%	52%	47%
Teenagers in HH	17%	20%	na
Teens ride city bus	30%	46%	na
Internet Access	83%	78%	na
Occupation			
Professional/technical	24%	30%	26%
Retired	14%	16%	15%
Manager/proprietor	13%	7%	11%
Student	9%	15%	8%
Clerical	8%	3%	8%
Sales	6%	5%	5%
Housewife/househusband	5%	6%	7%
Unemployed/disabled	5%	3%	3%
Craftsman/trade/laborer	3%	8%	10%
Service worker	3%	3%	6%
Refused	8%	4%	3%

II. Perceptions of Public Transit

A. Top of Mind Images

Overwhelmingly, the term “public transit” initially brings images of buses to the public’s mind (67%). Other forms of public transit such as light rail, trains, or subways are also frequently called to mind (10%, 6%, and 5%, respectively). These results are similar to 2001 findings. Light rail is most often mentioned by men (15% vs. 5% women), college graduates (14% vs. 5% without a degree), white collar workers (14% vs. 4% blue collar), and those with annual household incomes of at least \$40K (16% vs. 3% earning less).

The significant decrease in the percentage of residents who indicated a first response of the system being “inadequate” that took place between the 1998 and 2001 studies remained at the lower level this year (18% in 1998, 4% in 2001, and 3% in 2003). It appears the service improvements are recognized. However, a small percentage of residents still believe the system is less than optimal; as their first responses are inconvenient scheduling (3%), routes not being well planned (2%), empty buses (1%), or not enough buses (1%).

Table 1: Images of Public Transit

Responses	2003 (n=415)	2001 (n=404)	1998 (n=401)
Buses	67%	68%	66%
Monorail/light rail	10%	10%	6%
Trains	6%	5%	10%
Subways	5%	4%	6%
Inadequate bus system	3%	4%	18%
Inconvenient times/schedule	3%	1%	4%
Routes not well planned	2%	2%	4%
Reduces traffic congestion	2%	2%	4%
Mode of transportation	2%	2%	2%
Taxis	2%	2%	2%
Tempe Transit (Flash, TIM, general)	2%	-	-
Not enough buses	1%	2%	4%
Empty buses	1%	2%	-
Trolleys	1%	2%	2%
Good for environment	1%	2%	-
People waiting for buses	1%	2%	2%
Roads/freeways	1%	2%	-
Getting stuck behind a bus in rush hour	1%	-	-
Waste of money	-	1%	2%
Don't know/nothing	4%	9%	3%

4:1 What is the first image that comes to your mind when you hear the words “public transit”? What other thoughts?

B. Who Benefits from Public Transit Services

Nearly three in seven (42%) Tempe residents feel the public transit services in Tempe benefit everyone. A majority of the respondents indicated the transit system only benefits certain factions of people, such as those without cars (26%), low-income residents (12%), people who cannot drive (11%), or ASU students (10%). Bus riders are significantly more likely to say transit benefits everyone (49% compared to 37% of non-riders). In addition, blue-collar workers are significantly more likely than those in white-collar jobs to feel transit is a benefit for everyone (69% vs. 42%).

Residents with at least some college are more likely than those with less education to feel public transit benefits poor or low income residents (13% vs. 5%). Those age 55 and older are more likely to say transit benefits people who cannot drive (18% vs. 9% of younger residents).

Perceived Beneficiaries of Public Transit

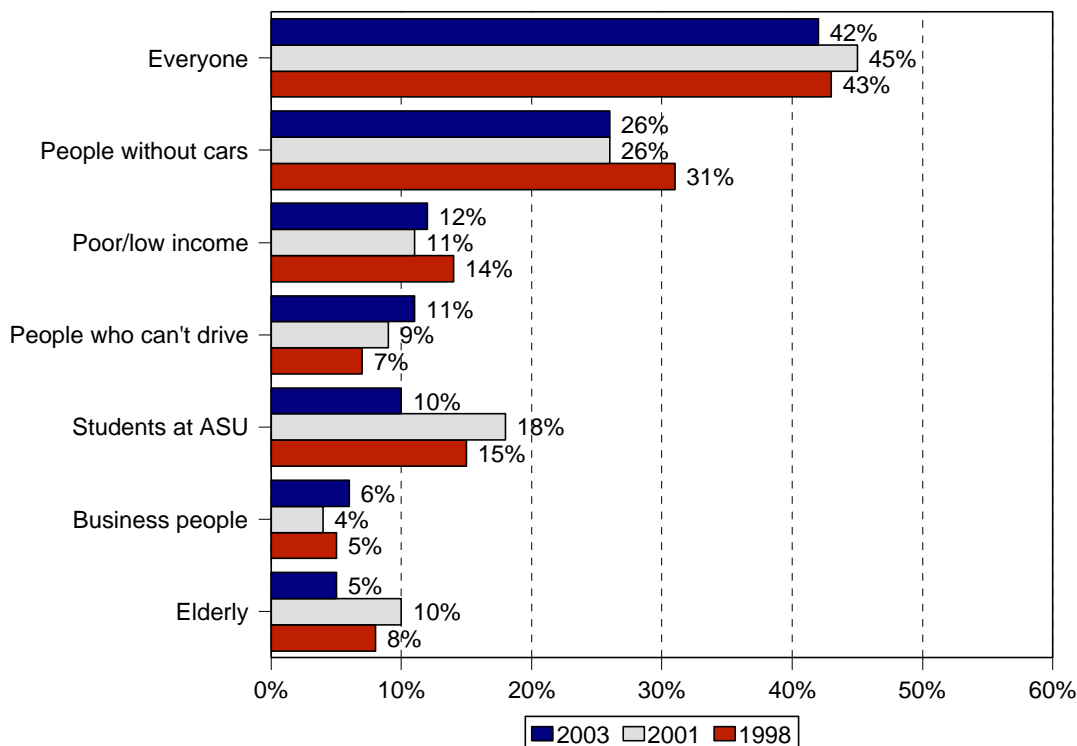


Table 2: Those Who Benefit from Tempe Public Transit

Those who benefit	2003 (n=415)	2001 (n=404)	1998 (n=401)
Everyone	42%	45%	43%
People without cars	26%	26%	31%
Poor/low income people	12%	11%	14%
People who can't drive	11%	9%	7%
Students at ASU	10%	18%	15%
Business people	6%	4%	5%
Elderly	5%	10%	8%
Young people	3%	7%	4%
Environment	2%	2%	-
Working class	1%	2%	2%
Tempe City Government, politicians, bureaucrats	1%	-	-
Tempe residents/taxpayers	1%	1%	3%
Disabled population	-	1%	-
Other	5%	5%	18%
No one benefits	3%	1%	2%

5:1 In your opinion, who benefits from having public transit in Tempe?

C. Perceptions of Riding the Bus

1. Non-Rider Perceptions- Agreement with Reasons

Of the ten common excuses people have for not riding the bus, Tempe residents were most likely to agree with the statement that they simply prefer to drive their car (86%).

Preference for their own car was highest among those under 35 years of age (97%) and those with some college education (92%).

The perception that riding the bus takes too long (67%) and that they need their car for business (57%) was also agreed upon by more than half of those who do not ride the bus.

The perception that “it takes too long” is strongest among residents under the age of 55 (74%), college graduates (75%), those with annual household incomes of at least \$40,000 (74%), and unmarried residents (73%). Men, those under age 54, and those with annual household incomes of at least \$40,000 are particularly likely to indicate they need a car for work (67%, 62%, and 65%).

Approximately three in seven indicate they do not know how to use the bus (41%) and service is not frequent enough (43%). Infrequent service is most frequently mentioned by college graduates (50%) and those NOT aware of TIM advertising (64% vs. 41% aware). One in four believe that bus stops are too far away (26%) and/or are not safe (24%). College graduates are most likely to perceive bus stops as too far away (32%).

Approximately one in ten agree that buses are dirty (11%), they don't like people who are on the bus (10%), and/or that buses are not safe (7%).

Table 3a: Reasons for Not Riding Bus
(Among those who have not ridden a bus in the past year)

% Agree	2003 (n=255)	2001 (n=289)	1998 (n=314)
Prefer car	86%	81%	80%
Takes too long	67%	56%	59%
Need car for business	57%	50%	52%
Not frequent enough	43%	35%	54%
Don't know how to use bus	41%	35%	32%
Bus stop far away	26%	30%	32%
Bus stops not safe	24%	20%	-
Buses are dirty	11%	7%	12%
Don't like people on bus	10%	7%	8%
Buses not safe	7%	8%	11%

9:1-20:1 -- People tell us different reasons why they do not ride the bus. You may or may not think the statements are true for you. I will

read you several statements, and would like you to tell me which ones you agree are reasons you do not ride the bus.

Table 3b: Reasons for Not Riding Bus- Demographic Breakdown
(Among those who have not ridden a bus in the past year)

% Agree	Total 2003 (n=255)	Education			Age		
		HS or Less (n=39)	Some College (n=66)	College Grad (n=142)	18-34 (n=66)	35-54 (n=109)	55+ (n=72)
Prefer car	86%	85%	92%	82%	97%	84%	78%
Takes too long	67%	46%	62%	75%	73%	74%	50%
Need car for business	57%	54%	54%	60%	65%	61%	46%
Not frequent enough	43%	23%	39%	50%	46%	44%	39%
Don't know how to use bus	41%	46%	50%	37%	47%	40%	39%
Bus stop far away	26%	15%	17%	32%	23%	30%	22%
Bus stops not safe	24%	33%	20%	23%	30%	18%	26%
Buses are dirty	11%	5%	12%	12%	18%	7%	7%
Don't like people on bus	10%	18%	3%	11%	15%	13%	3%
Buses not safe	7%	8%	8%	7%	8%	6%	6%

2. *Non-Rider Perceptions- Other Reasons*

When non-riders were asked for other reasons why people do not ride the bus, many reiterated statements they agreed with previously or made very similar references (see shaded areas).

New concerns raised about taking the bus included a general feeling that it was inconvenient to take the bus (17%) and that it could be too hot or cold (8%). A few mentioned that the bus doesn't go where they need to go, that buses are unreliable, schedules are inconvenient, and that there aren't enough direct routes (all mentioned by 4%).

Three in ten (30%) were unable to come up with any additional reasons for not taking the bus (14% none + 16% don't know).

Table 4: Other Reasons for Not Riding Bus

Responses	Total 2003 (n=255)
Inconvenience of taking the bus	17%
Have their own vehicles/convenience of driving	12%
Takes too long	9%
Too hot or cold/raining	8%
Bus stop too far from home/destination	8%
People need vehicle for work/pick up kids/run errands	5%
Doesn't go where they need to go	4%
Buses are unreliable/not on time/break down	4%
Inconvenient bus schedule times	4%
Too many transfers/no direct routes	4%
Unaware of bus schedule times and routes/don't know how to use bus system	3%
Bus stops have no shade	2%
Buses don't come by often enough/long wait times	2%
Too expensive	2%
Not safe	1%
Other	7%
None	14%
Don't know/no answer/refused	16%

21-1: What other reasons can you think of why people do not ride the bus?

(Among those who have not ridden a Tempe bus in the past year).

2003 data only.

Shaded areas represent sentiments expressed previously.

III. Potential Use of Tempe's Transit System

A. Past Ridership and Consideration of Riding

When those who had not ridden a bus in Tempe within the past year were asked if they have ever ridden a bus in the Valley, 37% said that they had (down from 41% in 2001 but virtually the same as 38% in 1998). Those who had never ridden a bus in the Valley were asked if they have ever thought about riding the bus. Only 42% of these residents had considered doing so. Residents in white-collar careers are significantly more likely than those in blue-collar careers to have thought about riding the bus (42% vs. 10%).

Table 5: Use of Buses in Valley

	2003 (n=255)	2001 (n=289)	1998 (n=314)
Have ridden in Valley	37%	41%	38%
	(n=160)	(n=170)	(n=189)
Have thought about riding	42%	38%	37%

7:1 and 8:1 - Have you ever ridden a bus in the Valley? (Among those who have not ridden a bus in Tempe in the past year.)

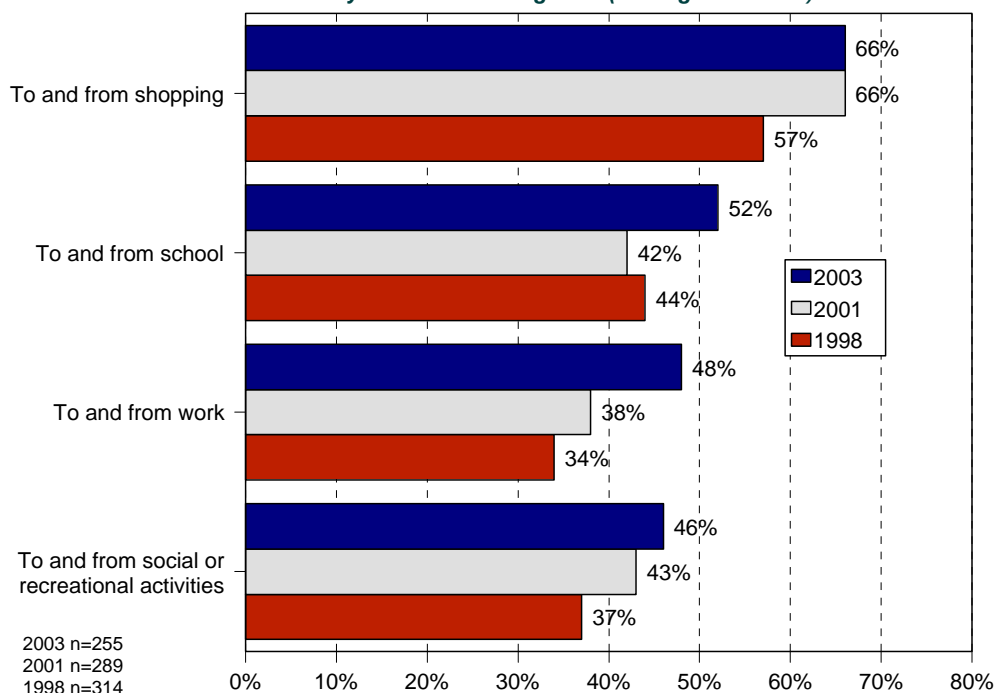
Have you ever thought about riding the bus? (Among those who have not ridden a bus in the Valley.)

B. Awareness of Bus Services

Compared to 2001, Tempe residents who do not ride the bus are considerably more optimistic about the ability of public transit to get them to and from school and to and from work. As in 2001, two-thirds of the non-riders believe there is local bus service to and from shopping destinations (66%). Approximately one-half believe they can get to and from school and/or work (52% and 48%, both up ten points from 2001). Slightly fewer think there currently is local bus service to take them to and from social or recreational activities (46% up from 43% in 2001).

Aware of Bus Service to Destinations

From what you know, do you think there currently is local bus service that you could take to get...? (Among non-riders)



- As demonstrated in the following table, non-riders under age 35 are more likely than older non-riders to believe they could take transit to all destinations. In general, residents 55 and older are least likely to believe buses are available to get them to and from any of the destinations.
- Non-riders who have a high school education or less are significantly more likely than those with more education to indicate they could take the bus to get to shopping destinations and for their work commute.
- Non-riders who are single are significantly more likely than those who are married to believe transit can get them to and from shopping destinations (73% vs. 60%).
- Non-riders with annual household incomes of under \$40,000 are significantly more likely than those earning more to think transit can get them to and from shopping destinations (83% vs. 60%).

Table 6: Awareness of Bus Services

Percent Responding Yes	2003 (n=255)	Education			Age		
		HS or less (n=39)	Some College (n=66)	College Grad+ (n=142)	18-34 (n=66)	35-54 (n=109)	55+ (n=72)
To and from shopping	66%	85%	73%	58%	88%	61%	56%
To and from school	52%	56%	61%	47%	65%	52%	39%
To and from work	48%	62%	62%	39%	64%	47%	38%
To and from social and recreational activities	46%	56%	52%	42%	56%	47%	38%

27:1 -- From what you know, do you think there currently is local bus service that you could take to get...? (Among non-riders)

C. Circumstances for Taking the Bus

Non-riders were asked to give specific circumstances that would make them consider taking a bus. As in 2001, **the strongest consensus (21%) was that if their car would break down, they might consider using the bus.** Those most likely to consider riding the bus if their car broke down are those under age 35 (39%).

Interestingly, the percentage of non-riders who say a better bus system would cause them to consider riding the bus has continued to decrease significantly. **Fewer than one in ten (8%) mentioned the need for an improved system this year. This is down from 14% in 2001 and 25% in 1998.** This may be an indicator that non-riders are aware of the improvements in the Tempe transit system and no longer feel inadequate service is the main barrier.

Non-riders also cited other circumstances of desperation – if they did not own a car (12%), no other transportation available (10%), or if they were unable to drive due to injury or illness (3%). One in ten non-riders (11%) indicated they would never consider riding the bus. This was particularly true among those who have never ridden the bus (15%) and non-riders 55 and older (15%).

Circumstances that would cause residents to Consider Riding the Bus

(Among those who have not ridden in the past year)

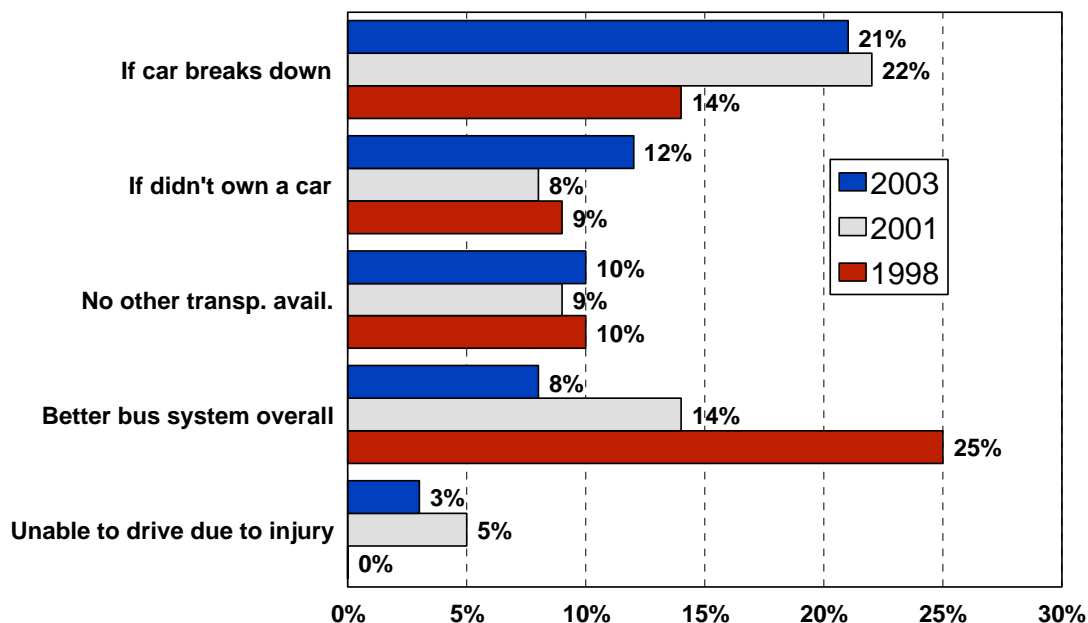


Table 7: When Residents would Consider Taking the Bus
(Among those who have not ridden a bus in the past year)

Circumstances	2003 (n=255)	2001 (n=289)	1998* (n=401)
If car breaks down	21%	22%	14%
If didn't own car	12%	8%	9%
No other transp. available	10%	9%	10%
Better bus system overall	8%	14%	25%
Daytime activity	5%	1%	2%
Convenience/faster	4%	-	2%
Direct routes/no transfers	4%	-	-
If unable to drive due to illness or injury	3%	5%	-
Going to event with parking problems	3%	4%	3%
To go shopping	2%	2%	2%
Job closer to home	1%	3%	-
If cheaper	1%	1%	-
If had better explanation of the bus system	1%	2%	2%
Going to downtown Tempe	1%	-	-
Going to downtown Phoenix	1%	1%	-
If lost driver's license	1%	1%	-
If didn't need car for work	1%	-	-
If bus ran 24 hours	-	2%	1%
If forced to	-	1%	2%
Other	18%	15%	19%
None/Wouldn't ride bus	11%	13%	12%
Don't know/not sure	6%	5%	1%

28:1 Under what circumstances do you think you would consider taking the bus?

*Asked of all respondents in 1998

D. Effects on Daily Routine

Non-riders in 2003 were slightly more likely than non-riders in 2001 to feel taking the bus would have an effect on their daily routine. Four in five Tempe residents who have not ridden a bus in the past year (80%) say that taking the bus would affect their daily routine (vs. 77% in 2001). Those under age 55 are significantly more likely to feel taking the bus would influence their routine (88%). In addition, college graduates (86%) and those with incomes above \$40,000 (85%) are also somewhat more likely to feel this way.

A wide variety of responses were given when those who indicated their schedule would be affected were asked to describe how using transit would impact them. **The most frequent concern among non-riders is that they would need more time for travel** (45% down from 52% in 2001 but higher than 27% in 1998). Others gave reasons indicating they felt they would be inconvenienced by riding the bus. For example, 12% said they would not be able to come and go as they like; 9% indicated it would be hard to adjust their personal schedule to fit the bus schedule; 6% complained they would have to plan ahead; and 4% did not like the idea of walking to and from their destination. Non-riders with higher annual household incomes (\$40K+) were more concerned than those earning less about not being able to come and go as they pleased (16% vs. 6%).

Non-riders perceived the positive impacts of riding the bus as having a daily routine (9% up from 3% in 2001), fewer errands (4%), and a more relaxing drive (1%).

Table 8: Effects on Routine
(Among those who have not ridden a bus in the past year)

	2003 (n=255)	2001 (n=289)	1998 (n=314)
Would affect routine	80%	77%	70%
Ways would effect	(n=203)	(n=223)	(n=220)
<i>Negative Impact</i>			
More time for trip	45%	52%	27%
Could not go/leave as please	12%	12%	8%
Change schedule to accommodate bus	9%	11%	6%
Plan ahead of time	6%	10%	2%
Walk to and from destination	4%	3%	3%
Can't depend on bus	3%	4%	3%
Don't go same place every day	2%	8%	6%
Doesn't go where I need to	2%	3%	-
Difficult if child care drop-off	2%	3%	-
Stressful worrying if will catch bus	2%	-	-
Couldn't carry a lot of things	2%	2%	1%
Too many transfers	1%	-	-
May arrive sooner than expected	1%	-	-
<i>Positive Impact</i>			
Makes day more routine	9%	3%	1%
Would make less errands	4%	3%	-
More relaxing	1%	2%	1%

31-32: - Do you think taking the bus would affect your daily routine? In what way would this affect your routine? (Among those who said that taking the bus would affect their daily routine.)

E. Effectiveness of Persuasive Arguments

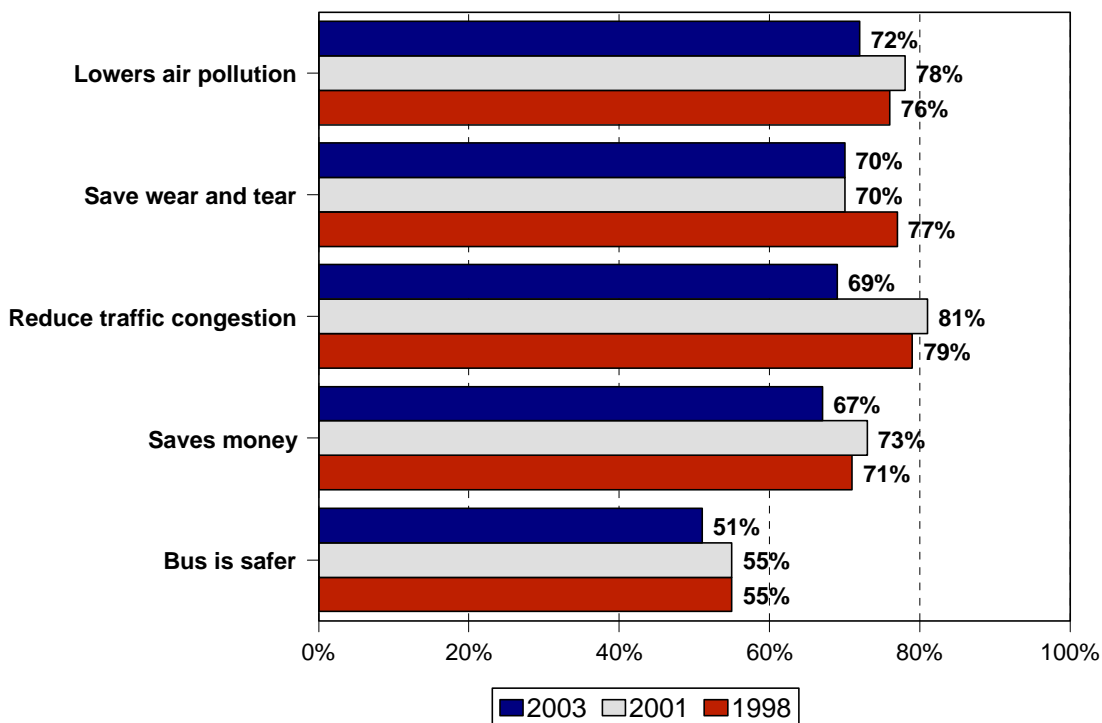
I. Agreement with Aided Arguments

A majority of non-riders indicated all of the benefits mentioned, except for safety, would be persuasive arguments to get people to use the bus instead of commuting by car (67% to 72% very + somewhat effective). As in the past, the weakest argument was that taking the bus is safer than driving (51%).

Compared to 2001, the perception that the messages are persuasive decreased for all messages except for saving wear and tear on your car (remained at 70%). The most notable decrease was for the argument that riding the bus will reduce traffic congestion (69% down from 81% in 2003). Perceived effectiveness of messages about lowering air pollution and saving money both dropped by six points (72% vs. 78% and 67% vs. 73%, respectively). The argument that buses are safer as an effective message also dropped slightly (51% down from 55%).

Persuasive Arguments

Very + Somewhat Effective



- Non-riders most likely to feel lowering pollution is persuasive are single (80% vs. 68% of those married), in blue-collar jobs (92% vs. 73% of white collar), and those 18 to 35 years old.
- Young non-riders (under 35) are more likely than older non-riders to find the arguments that it saves them money on gas and insurance compelling. Those 54 and younger are more likely than those 55 and older to find the argument about saving wear and tear on your car effective.

Table 9: Effectiveness of Reasons to Persuade Transit Usage

	2003 (n=255)	2001 (n=289)	1998 (n=314)	2003 Age		
				18-34 (n=66)	35-54 (n=109)	55+ (n=72)
Lowers air pollution						
Effective*	72%	78%	76%	85%	71%	67%
Not effective**	25%	17%	21%	15%	29%	25%
Save wear/tear						
Effective	70%	70%	77%	76%	76%	60%
Not effective	25%	27%	21%	23%	24%	28%
Less traffic congest.						
Effective	69%	81%	79%	73%	68%	75%
Not effective	28%	16%	18%	27%	31%	21%
Save money						
Effective	67%	73%	71%	79%	69%	60%
Not effective	29%	23%	28%	20%	30%	32%
Bus is safer						
Effective	51%	55%	55%	48%	54%	53%
Not effective	42%	37%	40%	48%	41%	38%

21:1 – 26:1 For each of the following benefits to riding the bus, please indicate how effective it would be in persuading you to ride the bus instead of using your current mode of transportation. Would it be very effective, somewhat effective, not very effective, or not at all effective?

* Very + Somewhat effective ** Not very + Not at all effective

2. Other Persuasive Benefits of Riding The Bus (Unaided)

When non-riders were asked for other benefits to riding the bus that might persuade them to try riding the bus, a few reiterated statements they agreed with previously such as saving money (5%), reducing pollution (4%), and reducing traffic congestion (2%.) (Indicated by shaded areas).

New persuasive benefits to riding the bus included not having to find a parking space (6%) and the ability to read and relax (4%). Others focused on improvements that would make riding the bus more appealing such as faster service, door-to-door service, direct routes/fewer transfers, and more reliable or more frequent service, among others.

Three in five (61%) were unable to come up with any additional benefits to riding the bus (34% none + 27% don't know).

Table 10: Other Reasons for Not Riding Bus

Responses	Total 2003 (n=255)
Not having to find parking	6%
It's a lower cost of transportation	5%
Faster service	4%
If bus stops were closer to home/destination/door to door service would be convenient	4%
Ability to read/relax while riding	4%
Cuts down on pollution/helps air quality	4%
Avoid driving in traffic/less traffic	2%
More direct routes/less transfers	2%
Not having a car/no car available	2%
Free bus service	2%
More hours of operation/24 hours	2%
Knowing bus schedule/locations/how to ride	2%
More reliable/more on time performance	1%
More frequent service	1%
Unable to drive/disabled/drunk/lost license	1%
Other	7%
None	34%
Don't know/no answer/refused	27%

28-1: What other benefits to riding the bus can you think of that might persuade you to try the bus instead of using a car to travel around town? (Among those who have not ridden a Tempe bus in the past year). 2003 data only. Shaded areas represent sentiments expressed previously.

F. Finding Information

This year Tempe non-riders are most likely to use the Internet or pick up the telephone if they want to find information about local bus services. The percentage mentioning going on-line to access information about the bus system has nearly doubled since 2001 (29% up from 15% and compared to only 2% in 1998). This may reflect an overall greater reliance on the Internet for information in general rather than an awareness of bus information actually being on-line. Although down slightly from 2001, **a high proportion still say they would call Valley Metro (26% down from 29%) or call the City (20% down from 23%).** It appears that some who in the past may have said they would call for information, have migrated to using the Internet instead.

Others felt that the Bus Book (15%), the Public Library (7%), and the Yellow Pages (5%) would provide the information they needed.

Sources of Information about Bus Service

(Among those who have not ridden in the past year)

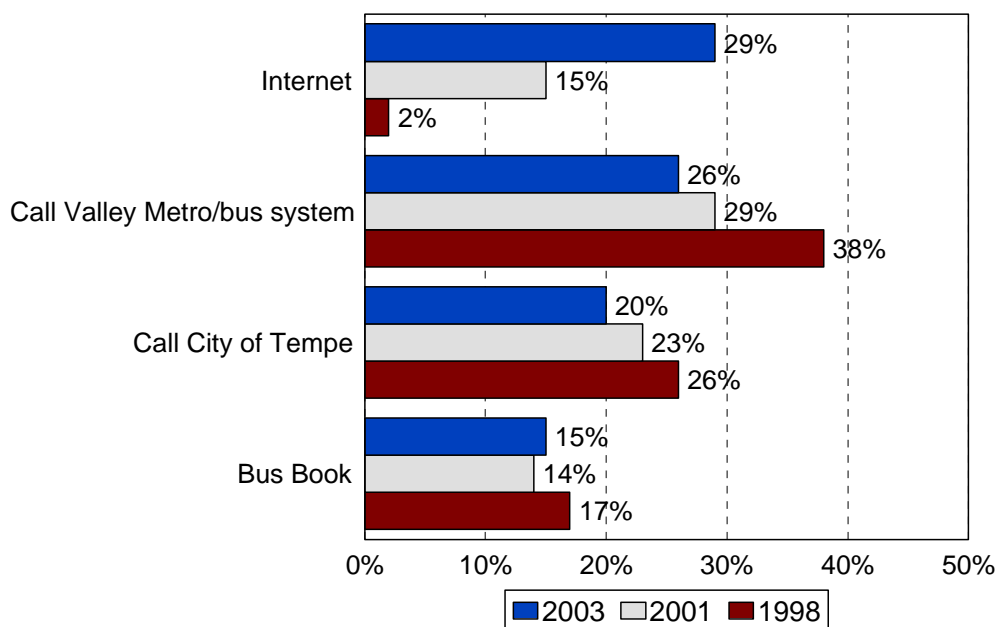


Table 11a: Finding Information about Bus Services
(Among those who have not ridden a bus in the past year)

Responses	2003 (n=255)	2001 (n=289)	1998 (n=314)
Internet	29%	15%	2%
Call Valley Metro/bus system	26%	29%	38%
Call City of Tempe	20%	23%	26%
Look for a Bus Book	15%	14%	17%
Public Library	7%	6%	5%
Yellow pages	5%	5%	7%
Schedules at bus stops	2%	5%	-
Ask a friend	2%	2%	2%
Bus Driver	2%	1%	2%
Work	1%	-	-
ASU	-	1%	1%
Other	5%	3%	7%
Don't know	8%	8%	-

33:1 -- If you were interested in riding a bus in Tempe, how would you go about getting information about the system?

- Men (35%), college graduates (34%), and those under age 55 (37%) are significantly more likely than their comparative groups to indicate they would go to the Internet for information (vs. 23% of women, 24% with less education, and 11% of those 55 and older).
- Calling Valley Metro is more often mentioned by non-riders 55 and older (43% vs. 18% of younger non-riders).
- Those with higher annual household incomes (at least \$40,000) are significantly more likely to say they would call the City of Tempe (26% vs. 10% earning less).
- Public libraries are particularly appealing to those ages 35 to 54 (11% vs. 3% to 4% of others) and to those with at least some college education (9% vs. no mentions for those with less education).

Table 11b: Finding Information about Bus Services
(Among those who have not ridden a bus in the past year)

Responses	Age			Education		
	18-34 (n=66)	35-54 (109)	55+ (n=72)	HS or less (n=39)	Some college (n=66)	College Grad + (n=142)
Internet	39%	36%	11%	18%	26%	34%
Call Valley Metro/bus system	14%	20%	43%	18%	24%	28%
Call City of Tempe	17%	17%	26%	15%	14%	23%
Look for a Bus Book	18%	14%	17%	28%	12%	13%
Public Library	3%	11%	4%	-	9%	8%
Yellow pages	4%	7%	1%	10%	3%	4%
Schedules at bus stops	3%	1%	4%	5%	3%	1%
Ask a friend	4%	1%	-	8%	2%	-
Bus Driver	-	2%	3%	3%	2%	1%
Work	-	1%	3%	-	2%	1%
Don't know	8%	6%	10%	11%	5%	12%

33:1 -- If you were interested in riding a bus in Tempe, how would you go about getting information about the system?

G. Advice for Potential Riders

Residents who had ridden a bus in the past year were asked what they would tell someone if they were asked whether or not they should start riding the bus. **The most common response was they would tell people to “give it a try” (36% up significantly from 28% in 2001). The percentage of riders indicating they would tell people the bus provides good service increased seven fold this year (14% up from only 2%).** Other positive endorsements were that it is good for the environment (6%), less expensive than a cab (3%), and less stressful than driving (1%).

Other riders gave practical advice or words of caution – check routes and schedules (10%), verify where the bus is going before you get on (3%), use it if your time is flexible (2%), make sure to leave enough time (1%), and have your money ready (1%). Whereas in 2001, 24% said their advice would depend on the person and their situation, only 1% made this comment in 2003.

A few riders indicated they would share negative sentiments and tell riders to only use the bus if they don't have a car and that it takes too long and/or buses are always late (7% and 3%).

Table 12: Advice for New Riders
(Among those who have ridden in the past year)

Responses	2003 (n=146)	2001 (n=115)
Positive		
Give it a try	36%	28%
Bus provides good service	14%	2%
Good for environment	6%	14%
Cheaper than a cab	3%	15%
Less stress	1%	4%
Practical/Neutral		
Check route and make a schedule	10%	6%
Make sure you know where bus is going	3%	2%
Use bus if have flexible timing	2%	-
Leave enough time	1%	6%
Depends on the situation	1%	24%
Have money ready	1%	2%
Negative		
If have own car use it, if not ride bus	7%	-
Takes too long/bus is always late	3%	-
Use as last resort	-	4%
Other	10%	5%
Don't know/not sure	14%	4%

44:1 -- If someone asked you whether or not they should start riding

the bus, what advice would you give them?

IV. Rider Characteristics and Opinions

A. Current Use of Public Transit

The percentage of Tempe residents reporting to have ridden a bus in Tempe in the past year has increased significantly since 2001 (36% vs. 29% and compared to 22% in 1998). Thirteen percent (13%) have ridden the bus more than 10 times in the past year (up from 8% in 2001 and 7% in 1998). Those most likely to be riding the bus are men (43%), under age 35 (47%), have annual household incomes of less than \$40,000 (46%), and are single (40% vs. 32% of married residents).

Table 13a: Frequency of Riding Bus in Tempe Past Year

#Times	2003 (n=415)	2001 (n=404)	1998 (n=401)
1 – 5 times	18%	18%	13%
6 – 10 times	5%	3%	2%
11 – 20 times	3%	1%	2%
20+ times	10%	7%	5%
NET RODE	36%	29%	22%
None	61%	72%	78%

6:1 How many times have you ridden on a bus in Tempe in the past year?

Table 13b: Frequency of Riding Bus in Tempe-2003 Demographic Breakdown

#Times	Gender		Age			Income	
	Male (n=208)	Female (n=207)	18-34 (n=66)	35-54 (n=109)	55+ (n=72)	<\$40K (n=131)	\$40K+ (n=209)
1 – 5 times	23%	13%	17%	18%	17%	14%	20%
6 – 10 times	7%	2%	8%	5%	2%	6%	6%
11 – 20 times	3%	3%	7%	1%	1%	5%	2%
20+ times	10%	10%	15%	8%	7%	21%	4%
NET RODE	43%	28%	47%	32%	27%	46%	32%
None	55%	68%	51%	66%	69%	53%	65%
Don't know	3%	2%	42%	2%	4%	2%	2%

B. Length of Use of Transit System

The percentage of riders who have ridden for more than one month but less than a year decreased to 23% from 41% in 2001 (which is more similar to the 16% measured in 1998). Those riding for more than two years increased significantly to 49% (vs. 29% in 2001, but similar to 44% in 1998). It appears that in addition to growing, the rider base in Tempe is stabilizing. Current riders have built this into their routine and fewer residents are new to the system. This may indicate a need to renew a campaign encouraging residents to try the system.

Table 14: Length of Use of Transit System
(Among those who have ridden in the past year)

Time Riding	2003 (n=146)	2001 (n=115)	1998 (n=87)
Less than a month	7%	9%	16%
1 – 3 months	9%	10%	6%
4 – 6 months	10%	15%	5%
7 – 12 months	4%	16%	5%
1 – 2 years	13%	17%	21%
2+ years	49%	29%	44%
Don't know	8%	4%	5%

32:1 -- How long have you been using the transit system in Tempe?

C. Reasons Ride the Bus

Riders are most likely to indicate the reason they ride the bus is because they do not have a car (30% down from 37% in 2001 but the same in 1998). Similarly, 8% ride the bus because their vehicle is unavailable or getting repaired and 2% do not have a license to drive. One in five (20%) riders say they use the bus because it is convenient (down from 44% but again consistent with 1998 findings). In 2003, riders gave a greater variety of reasons and purposes for taking the bus. Some say they ride the bus to avoid parking (6%), to save money (6%), and to get to and from various destinations: work (5%), recreational activities (5%), school (4%), and/or the airport (2%).

Those who ride because they do not have a car have incomes under \$40,000 (40%) and at most some college education (43%). Those most likely to indicate they ride because of convenience are those with white-collar occupations (29%).

Table 15: Reasons Ride the Bus
(Among those who have ridden in the past year)

Responses	2003 (n=146)	2001 (n=115)	1998 (n=87)
Don't have car	30%	37%	30%
Convenient	20%	44%	21%
Vehicle not available/having car problems	8%	-	-
To avoid parking	6%	-	-
Saves money	6%	3%	2%
To get/to from work	5%	-	-
To get/to from recreational activities	5%	-	-
A way to get around	5%	-	-
To get/to from school	4%	-	-
Just to ride the bus	3%	-	-
Don't have license	2%	4%	2%
To get/to from airport	2%	-	-
Saves wear on car	2%	2%	1%
Protects environm.	1%	7%	2%
Other	6%	5%	-

35:1 What is the main reason you ride the bus?

D. Travel Patterns

1. Travel Destination

As in the past, there are two main destinations that Tempe bus riders are heading for -- work (32%) and shopping (28%). In an increase over 2001, one in five (20%) riders indicate they also use Tempe buses to go to recreational activities (up from 16%). This year fewer riders reported taking the bus to ASU (18% down from 22% in 2001 and 25% in 1998).

Women, those with at most some college education, and those earning less than \$40,000 annually are most likely to take the bus to go shopping (39% vs. 21% of men, 40% vs. 20% of college graduates, and 42% vs. 15% of those earning \$40K+). Riders with at least some college are more likely than those with less education to ride the bus to recreational activities (20% vs. 5%). As expected, younger riders are more likely to report taking the bus to ASU (28% vs. 12% of older riders).

Bus Rider Destinations

(Among bus riders)

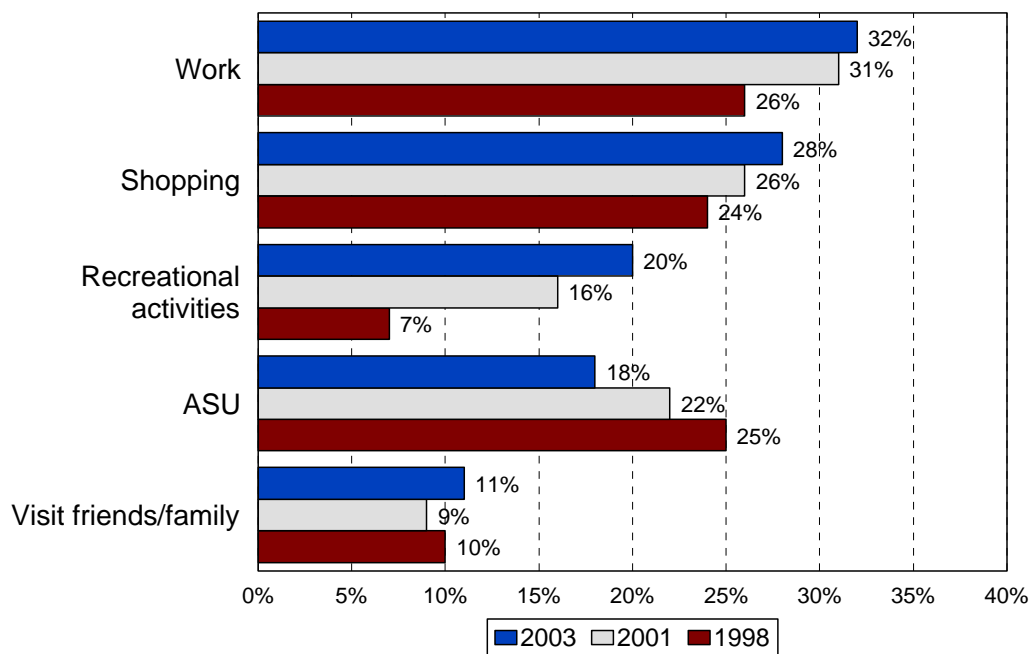


Table 16: Where Bus Riders Go
(Among bus riders)

Responses	2003 (n=146)	2001 (n=115)	1998 (n=87)
Work	32%	31%	26%
Shopping	28%	26%	24%
Recreational act.	20%	16%	7%
ASU	18%	22%	25%
Visit friends/family	11%	9%	10%
Dr. appointments	6%	4%	6%
Community college	6%	4%	4%
Errands	5%	5%	10%
Downtown (unspecified)	5%	-	-
Downtown Tempe	3%	5%	2%
High school	3%	-	-
Airport	3%	-	-
Court	3%	-	-
Library	2%	-	-
Downtown Phoenix	1%	6%	-
Where need to go	1%	5%	1%
Home	1%	1%	1%

34:1 -- Where do you go when you ride the bus?

2. *Travel to Arizona Mills*

Approximately one-third of Tempe bus riders have taken the bus to Arizona Mills Mall (32% up significantly from 23% in 2001). As expected women and younger riders (under 35) are more likely to have taken the bus to Arizona Mills (46% vs. 22% of men and 42% vs. 20% of those 35 and older). Those with household incomes less than \$40,000 also are more likely to have been to the mall via the bus (47% vs. 16% of those earning more).

The purpose of the majority of these trips was to go shopping (83%). As in 2001, the most frequently used routes were the 56 and 77.

Table 17: Arizona Mills
(Among bus riders)

	2003 (n=146)	2001 (n=115)
Ride Bus to AZ Mills	32% (n=46)	23% (n=26)
Route Taken		
56	30%	27%
77/Baseline	20%	30%
92	9%	12%
Red line/University	8%	4%
62/Hardy	6%	4%
McClintock & Southern	4%	-
72	2%	12%
51	2%	4%
Others	6%	8%
Don't know/no answer	33%	27%
Reason For Trip		
Shopping	83%	81%
Work	6%	8%
To transfer to another bus route	2%	-
Other	6%	15%

49:1 thru 51:1 Do you ever ride the bus to Arizona Mills?
If YES: Which route do you use to get there? Why do you go there?

E. Bus Activities

As in the past, the largest proportion of bus riders surveyed say they do nothing other than look out the window while riding the bus (47%). Reading books (27%) or magazines/newspapers (18%) and talking to other riders (14%) are the most common activities besides looking out the window. Riders who have a college degree are more likely than those with less education to read any type of materials (35% and 22% vs. 17% and 12%). Those with a high school education or less are more likely to do nothing or look out the window (70% vs. 44% with more education). White-collar professionals are more likely than those in blue-collar positions to read a book (35% vs. 8%).

Table 18: What Bus Riders Do on the Bus

Responses	2003 (n=146)	2001 (n=115)	1998 (n=87)
Nothing/look out window	47%	63%	53%
Read a book	27%	24%	24%
Read newspaper/ magazine	18%	14%	14%
Talk to other riders	14%	16%	12%
Listen to music	3%	5%	5%
People watch	2%	1%	1%
Work/study	2%	3%	5%
Watch for next stop	1%	-	-
Sleep	1%	-	2%
Talk to driver	-	4%	2%

52:1 -- What do you do while riding the bus?

F. Alternate Modes of Travel

As in the past, if there were no transit services in Tempe, riders would make the needed trips by using other modes of transportation. Two in five (40%) indicate they would drive themselves, while 22% report that they would get a ride from someone else. Many would have to call a taxi (13%). One in ten would ride a bike or walk (both at 10%). An additional one in ten (10%) said they would just not be able to make their needed trips if there was no transit service available.

Those with a college degree, white-collar jobs, age 36 or older, and those who earn at least \$40,000 annually are more likely to indicate they would drive themselves (49%, 56%, 50%, and 53%). Those with a high school education or less are more likely to get a ride from someone else (45%). Non-riders 35 and younger are more likely than older non-riders to say they would ride a bike instead (18%).

Making Trips without Transit

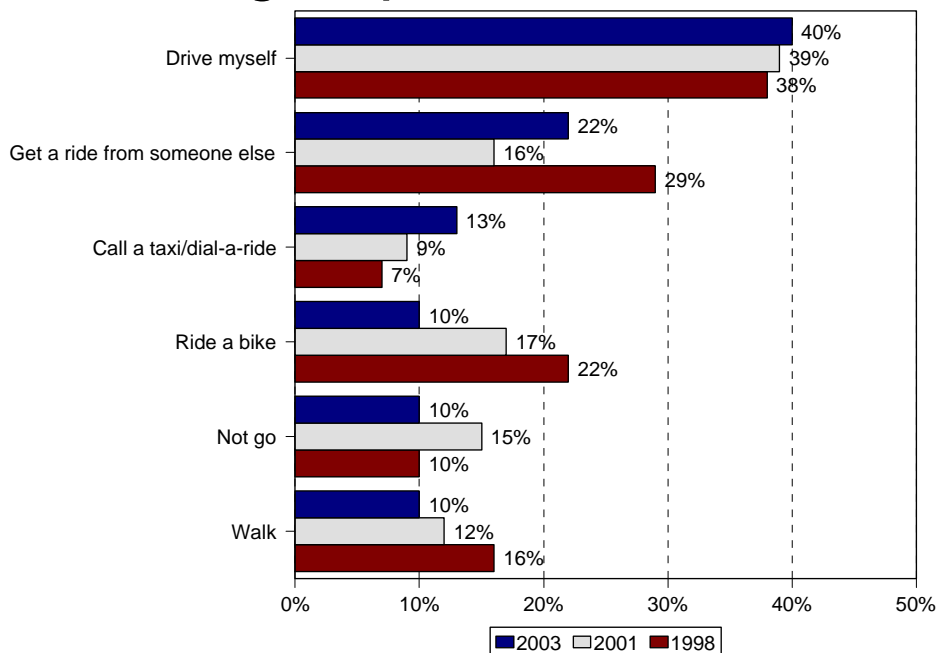


Table 19: Alternate Modes of Travel

Responses	Total 2003 (n=146)	Education		
		HS or less (n=20)	Some college (n=41)	College degree (n=81)
Drive myself	40%	15%	37%	49%
Get a ride from someone else	22%	45%	32%	12%
Call a taxi/dial-a-ride	13%	10%	20%	11%
Ride a bike	10%	15%	10%	10%
Not go	10%	25%	10%	6%
Walk	10%	5%	15%	7%

53:1 -- How would you make the trips that you currently use the bus for if there were not transit service in Tempe?

G. Source of Initial Information about Bus Service

When they first rode the bus in Tempe, riders were most likely to look for a Bus Book for more information (23%). Asking a friend and calling Valley Metro were the other most popular sources of information (both mentioned by 13%). Residents 55 and older are most likely to say they called Valley Metro (29%).

This year 6% mentioned the newspaper as their source of initial information (vs. none in prior years). The Internet continues to be a source of information (6%), particularly for men (9%). In 2003, fewer riders reported asking drivers for information about transit (4% down from 10% in 2001 and 12% in 1998).

Table 20: Bus Information

Responses	2003 (n=146)	2001 (n=115)	1998 (n=87)
Look for Bus Book	23%	20%	22%
Ask a friend	13%	22%	23%
Call Valley Metro	13%	11%	26%
Newspaper	6%	-	-
Internet	6%	5%	1%
Asked driver	4%	10%	12%
Library	4%	2%	5%
High school	3%	-	1%
At bus stop	3%	-	-
At work	3%	-	-
Call City of Tempe	3%	4%	5%
Family member	3%	3%	6%
Always knew it was there	2%	-	-
Newscast	-	12%	1%

54:1 -- How did you get information about transit services in Tempe for the first time you rode a bus in the city?

H. Finding Information about Bus Schedules

The Bus Book is the main source of information used by current riders to get information about bus schedules (41% up from 37% in 2001). One in ten riders use the Valley Metro information line and the Internet as information sources (both mentioned by 10%). This year, 9% of riders say they get information from route maps at stops (up from 5%).

Table 21: Bus Schedule Information

(Among bus riders)

Responses	2003 (n=146)	2001 (n=98)
Bus Book	41%	37%
Call (602) 253-5000	10%	14%
Internet	10%	8%
Route maps at bus stops	9%	5%
Friend	4%	6%
Work	3%	4%
Library	3%	3%
Family members	3%	2%
School	3%	2%
Work	3%	-
Already know info.	2%	-
Bus driver/bus station	1%	4%
Newspaper	1%	2%
Convenience store/grocery store	1%	-
Mail	-	2%
Individual route maps	-	1%

41:1 – How do you get your information about bus schedules?

I. Satisfaction with Bus Service

1. Satisfaction Ratings

Overall, four in five (80%) riders are satisfied with the Tempe bus system (43% very + 37% somewhat). Those with higher annual household incomes (\$40K+) are significantly more likely than those earning less to be satisfied with the Tempe system (90% vs. 75%).

The Tempe bus systems earns its highest ratings for the cleanliness and comfort of the buses (both at 91% satisfied), however riders are more likely to indicate they are “very satisfied” with cleanliness (59% vs. 43% for comfort).

A strong majority indicates they are satisfied with the safety on the bus (87%; 55% very + 32% somewhat). Of the 14 riders who indicated they do not feel safe on the bus, 7 could not identify the routes they take and the following “routes” were each named by one rider: all routes, any Mesa routes, “Bell,” “Broadway,” “Mill Ave. to 5th St.,” and the route out to Apache Junction.

Approximately four in five (78% to 83%) are satisfied with the drivers, ease of using the bus and understanding the schedule and maps, and the on-time performance of buses. Driver courtesy and professionalism received the highest percentage of “very satisfied” ratings (62%). Two-thirds (67%) rate route frequency as satisfactory (32% very + 35% somewhat).

Younger riders (under 35) are significantly more likely than riders 55 and older to be satisfied with the ease of reading and understanding the maps and schedules (88% vs. 68% and compared to 81% for those ages 35-54). Riders with at most a high school diploma are more likely than those with at least a college degree to be satisfied with route frequency (85% vs. 65% and compared to 73% of those with some college).

Table 22: Satisfaction with Bus Service

(Among bus riders)

Attributes (n=146)	Net Satisfied*	Very Satisfied	Somewhat Satisfied
Overall Satisfaction	80%	43%	37%
Cleanliness of the bus	91%	59%	32%
Comfort on the bus	91%	43%	48%
Safety on the bus	87%	55%	32%
Driver courtesy and professionalism	83%	62%	21%
Ease of using the bus	82%	51%	31%
Ease of reading and understanding the schedule and maps	81%	51%	30%
Reliability/on-time performance of buses	78%	40%	38%
Route frequency	67%	32%	35%

37-44 and 48: In general how satisfied are you with... *Includes Very Satisfied + Satisfied Ratings.
 2. **Satisfaction with Resolution of Complaint**

Eleven percent (11%) of riders indicated they had filed a complaint with the City of Tempe about the bus system. Among those who filed (16 riders), 1 was "very satisfied" with the resolution, 7 were "somewhat satisfied," 4 were "somewhat dissatisfied," and 4 were "not at all satisfied."

V. Tempe In Motion (TIM)

A. Awareness of Tempe in Motion

As in 2001, **nearly two in five Tempe residents have heard of "TIM," Tempe's transit, bike, and pedestrian program (39%)**. Current bus riders, men, and residents under the age of 55 are most likely to be aware.

Four in seven (57%) of those aware of the acronym "TIM" could state that it stands for "Tempe In Motion." Interestingly, the only significant demographic difference was that younger residents (under 35) are significantly more likely than those 55 and older to know its meaning (59% vs. 35%). Current riders were only slightly more likely to know the meaning of the acronym TIM (59% vs. 55% of non-riders).

Table 23: Awareness of TIM

	2003 (n=415)	2001 (n=404)
Total Awareness (Unaided + Aided)	39%	38%
Unaided Awareness	8%	12%
Aided Awareness	31%	26%
Meaning of TIM	(n=152)	(n=154)
"Tempe in Motion"	57%	55%
Other	1%	9%
Don't know	43%	36%

59:1 thru 61:1 -- What is the name of Tempe's transit/bicycle/pedestrian program?
 Have you ever heard of TIM? IF YES: To the best of your knowledge, what does TIM mean or stand for?

B. Source of Awareness (Among those Aware)

Residents who were aware of TIM were most likely to have become aware through one of five sources –street banners (24%), print advertising (16%), signs on the buses (16%), television (10%), and/or direct mail (9%). Awareness through television and radio are down from 2001 (10% vs. 23% and 1% vs.7%).

Table 24: Source of TIM Awareness
(Among those aware)

Responses	2003 (n=152)	2001 (n=154)
Street banner	24%	21%
Print ads	16%	19%
Signs on the buses	16%	18%
TV	10%	23%
Direct mail	9%	6%
Word of mouth	4%	3%
Bill inserts	4%	2%
Library	3%	-
Newspaper	3%	-
Signs (general)	3%	-
Cinema/movie slides	2%	1%
Bus book	2%	-
Radio	1%	7%
Mall kiosks	1%	3%
Internet	1%	2%
At work	-	3%
Other	3%	4%
Don't know	16%	13%

62:1 -- How did you hear about it? (Among those aware)

C. TIM Advertising

1. Awareness and Source of Advertising

One-half (51%) of Tempe residents aware of TIM reported they had also seen advertising for TIM. This represents a decrease from 2001 when 60% were familiar with TIM advertising. Those with annual household incomes of less than \$40,000 were significantly more likely than those earning more to be familiar with advertising (60% vs. 42%).

The most common sources of advertising awareness are television and street banners (each mentioned by 26%). Signs on buses and print ads are also frequently recalled (17% and 15%, respectively). This represents a shift from 2001 when nearly half recalled television advertising and 15% mentioned street banners and no one mentioned seeing signs on buses.

Table 25: Source of TIM Advertising Awareness
(Among those aware of TIM)

	2003 (n=152)	2001 (n=154)
Aware of TIM advertising	51%	60%
Source of Advertising	(n=78)	(n=93)
TV	26%	48%
Street banner	26%	15%
Signs on buses	17%	-
Print ads	15%	13%
Direct mail	6%	10%
Radio	4%	8%
Cinema/movie slides	4%	2%
Signs (general)	3%	-
Library	3%	-
Newspaper	3%	-
Bill inserts	1%	-
Billboard	1%	-
Mall kiosks	-	1%
Other	3%	8%
Don't know	12%	6%

63:1 – 64:1 -- Do you remember hearing or seeing any advertisements for TIM? Where did you see the advertising for TIM?

2. Advertising Message

As in 2001, almost half of those aware of advertising (47%) could not recall a message. **Those who were able to recall a message described ads that promoted “TIM” and “Tempe in Motion” (15% and 6%), using alternate modes (9%), and the benefits of taking the bus (5%).** An additional 5% recalled advertisements about the new buses that “kneel” or lower down. Others mentioned the message that “it’s cool to ride the bus” (3%), learning about extended hours and service (3%), and where to get bus scheduling information (3%).

**Table 26: TIM Advertising Message
(Among those Aware)**

Responses	2003 (n=78)	2001 (n=93)
Just “TIM”	15%	8%
Promotion of using alternate modes “Tempe in Motion”	9%	11%
Benefits of taking the bus	6%	4%
New buses that “kneel”/new buses that lower down	5%	13%
It’s cool to ride the bus	5%	2%
Extended bus service/hours	3%	-
Where to get bus information/scheduling	3%	-
Girls opts for bus instead of low rider	-	3%
Happy people taking the bus	-	2%
Ease of taking the bus	-	2%
A woman taking the bus	-	2%
Other	5%	8%
Don’t know	47%	47%

65:1 -- What messages do you recall?

3. *Advertising Effect on Perception of Tempe Bus System*

Four in nine residents aware of TIM advertising indicated the ads made them think more positively about the bus system in Tempe (44% down from 54% in 2001). The remaining residents indicated the ads had no affect on their perceptions (46%) or could not say either way (10% don't know).

**Table 27: Advertising Affect on Perception
(Among those Aware of TIM advertising)**

	2003 (n=78)	2001 (n=93)
Make you think more positively about the bus system in Tempe	44%	54%
Have no effect on your perceptions	46%	45%
Make you think negatively about the bus system in Tempe	-	-
Don't know	10%	1%

66:1 -- How did the advertising affect your perception of the bus system in Tempe? Did it...

VI. Miscellaneous Issues

A. Advertising New Transit Services

As in the past, residents feel that additional services to the Tempe's transit system should be advertised by using mass media sources. Direct mail and television are the main mediums suggested (25% and 23% mentioned). Additionally, 17% say that residents could be informed of the new service through newspapers and 5% suggested radio as a way to disseminate information.

The only significant difference between riders and non-riders is that only riders mentioned using bus shelters as the best way to introduce new services (5% mentioned).

While married residents more often suggest direct mail (31% vs. 21% of singles), single residents are more likely to prefer television (29% vs. 18% of those married). Younger residents (under 35) are more likely to mention television (35% vs. 18% of older residents). Newspapers are most frequently mentioned by residents 35 and older, college graduates, and those with annual household incomes of at least \$40,000 (20% to 21% vs. 9% to 12%).

Table 28: Introducing New Services in Tempe

	2003* (n=415)	2001* (n=404)	1998* (n=401)	2003 Bus Riders	
				Bus Rider (n=146)	Non Bus Rider (n=255)
Direct mail	25%	34%	24%	21%	28%
Television	23%	41%	32%	18%	25%
Newspaper	17%	33%	26%	17%	18%
Insert in water bill	6%	9%	4%	7%	5%
Radio	5%	12%	4%	3%	5%
Flyer/newsletter	5%	5%	2%	6%	4%
Internet/email	2%	4%	-	3%	2%
Utility bills in general	2%	3%	-	1%	2%
Bus shelters	2%	2%	-	5%	-
Phone call	1%	-	-	2%	-
Information inside of buses	1%	-	-	2%	1%
Information on buses	-	4%	1%	1%	-
At school	-	2%	-	1%	-
Other	2%	5%	6%	1%	3%
Don't know/not sure	9%	4%	1%	9%	9%

67:1 -- If new transit services are going to be introduced, what would be the best way for the City of Tempe to tell you about them?

* In 2003 and in 1998, respondents were allowed to give only ONE answer, but in 2001 they could give multiple responses.

B. Bicycle Usage

Similar to findings from 2001, approximately four in seven Tempe residents have access to a bicycle (56%). Four in nine Tempe residents with bikes ride them at least three to five times a month (44% down from 52% in 2001). Male residents are more likely than female residents to have access to a bike (64% vs. 48%). As expected, younger residents are more likely to have access to a bike than residents over the age of 55 (63% vs. 40%) and are also more likely to ride it at least ten times a month (33% of those 18 to 34 vs. 17% of those older). College graduates and those with annual household incomes of at least \$40,000 are significantly more likely than their counterparts to have access to a bicycle (65% vs. 47% and 68% vs. 46%, respectively).

Table 29a: Access to and Frequency of Bike Use

	2003 (n=415)	2001 (n=404)	1998 (n=401)
Have access to bike	56%	58%	60%
Never/occasionally	36%	33%	35%
Once or twice	18%	13%	16%
Three to five times	14%	17%	14%
Six to ten times	8%	8%	8%
10+ times	21%	27%	26%
Don't know/not sure	3%	2%	2%

68:1 and 69-1 Do you have access to a bicycle that you can ride when you want to? How many times in a month do you ride your bike? (Among those who have a bike to ride.)

Table 29b: Access to and Frequency of Bike Use

	2003 (n=415)	Gender		Age		
		Male (n=200)	Female (n=204)	18-34 (n=138)	35-54 (n=134)	55+ (n=124)
Have access to bike	56%	64%	48%	62%	64%	40%
Never/occasionally	36%	33%	40%	29%	42%	31%
Once or twice	18%	18%	18%	15%	17%	26%
Three to five times	14%	14%	14%	12%	16%	14%
Six to ten times	8%	9%	6%	6%	8%	12%
10+ times	21%	22%	20%	32%	15%	14%
Don't know/not sure	3%	4%	1%	4%	2%	2%

It seems that most of the time, bicycles are ridden for the purpose of exercising (59%). Nearly one-third (30%) uses a bike to get to work and only 12% use a bike to go to the store. Men, younger residents, and those with at least some college education are more likely to report riding a bike to work/school (39% vs. 16% of women, 34% vs. 11% of those 55+, and 32% vs. 12% with less education).

Table 30: Where Bike Riders Go

	2003 (n=142)	2001 (n=404)	1998 (n=401)
Exercise	59%	64%	56%
Work/school	30%	32%	26%
Store	12%	14%	24%
Park	6%	8%	6%
Friend's house	4%	5%	6%
Run errands	2%	-	-
Mill Avenue/ Downtown Tempe	2%	-	-
Library	1%	1%	4%
South Mountain	1%	-	-
Anywhere	1%	-	-
Tempe Town Lake	1%	-	-
Bike paths	1%	1%	3%
Other	1%	3%	11%
Don't know/not sure	-	2%	1%

70:1 Where do you go when you ride your bike?