

2011 Rider Satisfaction Survey Total Market

Prepared for:

Valley Metro
Spring 2011



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Executive Summary

This report presents the results of the fourteenth Rider Satisfaction Tracking Survey, which was conducted in the spring of 2011. This year, data for the 2011 rider satisfaction study were collected using a combination of intercept and telephone with a total sample of 761 completed interviews: 561 intercept and 200 telephone interviews. The overall margin of error for the study is $\pm 3.4\%$ at the 95% confidence level. It is important to note that this study involved a sample of riders from various routes, but not all routes were represented in the sample.

Rider Demographics

This year, the significant decreases that occurred in the following demographic subgroups last year were sustained: income, employment, luxury item ownership and respondents with a valid driver's license.

These decreases may be attributable to economic conditions; however, it is important to note a portion of the decrease is also likely attributable to changing the methodology from telephone-only to primarily intercept interviews with some telephone supplementation that began in 2010.

Rider Characteristics

- This year, the average number of years of public transit usage reported by riders decreased (from 7.6 years in 2010 to 6.7 years. As a result, more riders report using transit for two years or less (39%, up significantly from 30% in 2010).
- Fewer riders report riding the bus five days a week while ridership continues to be highest for 6+ days a week. In fact, those who report riding the bus five days a week has dropped significantly for two consecutive years (21%, down from 26% in 2010 and 36% in 2009) while one third of bus riders continue to be heavy bus riders (6+ days per week). The 'typical' bus rider rides the bus 4.3 days per week.
- The frequency of light rail ridership continues to increase and the typical light rail rider now reports riding the train an average of 1.2 days more often this year (3.2 days) than in 2009 (2.0 days). Light rail only riders also report riding the light rail an average of one day a week more than combination riders (3.8 vs. 2.8 days).
- Almost half of all riders (46%) report riding public transit *more often* than a year ago (unchanged from 2010). The 12% of riders who claim to be using public transit *less often* than last year cite vehicle availability (17%), prices too high (14%) and carpool more (12%). Mentions of prices too high have dropped significantly from 2010 (from 29% to 14%).
- Although weekday transit usage has decreased significantly from last year (94% to 91%), the record high ridership levels reported in 2010 for Saturday and Sunday usage were sustained this year 68% and 52%, respectively).

- Approximately the same proportion of riders claim to be using public transit in the morning hours while fewer claim to be using it in the early evening hours.
- Public transit usage within the Phoenix city limits remains significantly higher than for any other city named; with 79% of riders stating they use public transit ‘most often’ in Phoenix (down from 83%). The percentage of riders indicating they travel around ‘most often’ in Tempe continued to climb this year (35%; up from 31% in 2010 and 26% in 2009) as did the percentage of riders indicating they travel around ‘most often’ in Glendale (15%, up from 10%).
- Rider access to a vehicle remains low, as three in five riders (60%) do not have a vehicle at their disposal, even occasionally.. This is similar to the 2010 vehicle availability levels reported (63% did not have vehicle access) and is much lower than the access levels measured in 2009 (39% did not have access).
- The significant decrease in the percentage of riders who claim to have a valid driver’s license that occurred in 2010 is sustained this year (57% in 2010; 54% currently). Almost three fourths (72%) reported having a license in 2009.

Trip Characteristics

- The most popular form of payment, full fare, has increased significantly among riders since 2009 (39% in 2009 to 53% in 2010 to 60% today). Riders who report using a reduced fare has remained stable (27% vs. 26% in 2010). Mentions for the third most frequently mentioned fare, a discounted card purchased through an employer, have decreased significantly compared to the last two years (from 24% in 2009 to 12% in 2010 to 9% currently).
- When riders were asked how they usually pay for their transit fare, significantly fewer riders reported using a pass this year (63%, down from 73% in 2010) while significantly more riders reported paying with cash (40%, up from 26% in 2011).
- Riders who report using and all day, 3-day or 7-day pass increased significantly for the second consecutive year (10% in 2009; 28% in 2010 and 40% today) while monthly pass usage has decreased significantly since 2010 (37%, down from 44%).
- The most popular locations for purchasing a transit pass cited are the “transit center” (43%) and the grocery store (42%). Mentions for grocery store increased significantly from last year (42%, up from 30%) so it is now at parity with those who use the “transit center.”
- Mentions for transit modes used in addition to city buses and light rail decreased significantly for two out of the three modes. One third of riders report using neighborhood circulators (32%, down from 38%) which remains the most frequently used bus type while less than two in ten (17%) report using an express bus. Riders who report riding the Link remains unchanged from 2010 (13%).

- Riders remain most likely to report using public transit to travel to and from work (56%); however, this percentage is the lowest reported in the last five years of interviewing. The next most frequently mentioned destinations include shopping (40%) visiting friends/relatives (28%) going to school (24%), taking care of personal business (24%), and recreational events (22%).
- Riders are traveling slightly longer distances to get to public transit stops; two in five riders (40%) currently report travelling less than one-quarter mile compared to 49% in 2010. Riders are slightly more likely to report travelling between one-quarter of a mile and two miles (35% vs. 28%).
- Walking is the overwhelmingly most popular way to access transit with over three fourths (78%) of riders reporting to use this mode. Biking (7%), driving alone (6%), vanpool (6%), taxi (5%) and driving/riding with others (5%) are also used to access transit, but to a much lesser extent than walking.
- Riders who report they are likely to make a transfer on a typical one way trip has reached a four year high (77%), while riders who do not make any transfers has reached a four year low (23%).
- Riders surveyed indicate they are spending approximately the same amount of time on their trips compared to last year with approximately half reporting to spend less than 45 minutes on their average transit trip (53% vs. 56% in 2010).
- Similar to the last four years, the vast majority of riders indicate they walk to their destination at the completion of their trip (92%). Driving alone is a distant second at 6% while bicycles (2%), circulators (2%), taxis (1%), and vanpools (1%) are also used, but to an even lesser extent.

System Satisfaction Questions

- Bus riders are most likely to be satisfied with *the driver's safe driving, the ease of understanding the bus schedule and route information and availability of schedule and route information* (85%, 84%, and 81% giving a "4" or "5" rating where "5"= "very satisfied"). These were also the top three attributes last year. Riders are least likely to indicate high satisfaction with buses running on time (59% vs. 58% last year).
- Significant increases in satisfaction ratings are observed among bus riders for the following bus elements: *ease of bus fare payment* (78%, up from 72%), *accuracy of schedule and route information* (75%, up from 70%), *value of service for fare paid* (69%, up from 63%) and *availability of bus shelters* (63%, up from 55% last year). No attributes experienced significant declines in satisfaction.
- It appears that bus-only riders have a higher overall satisfaction with the bus service provided than those who ride a combination of the bus and light rail as they provide

higher ratings for all of the elements evaluated and significantly higher ratings for the majority (13) rated.

- Riders indicating they use the light rail were asked to rate their satisfaction level with a series of light rail service elements. Light rail users are most likely to be satisfied with the *trains running on time* and *total travel time* (90% gave a “4” or “5” rating where “5”=“very satisfied”). *Ease of fare payment*, *comfort on the train*, and *cleanliness inside the train* round out the top five elements with the highest satisfaction (87%-89% giving a “4” or “5” rating).
- Light rail users in general are least likely to indicate high satisfaction with *personal space on the train* (79%). *Personal space on the train* was the only attribute out of the 11 rated that had a significant change in ratings (79%, down from 84%).
- Overall satisfaction with the transit service in the Valley inched up slightly, but not significantly, this year (from 75% to 78%). This increase is mainly attributable to an increase in the percentage of those providing satisfaction ratings of “4” (42%, up significantly from 37%).
- Riders reporting high satisfaction with the system (giving a “4” or “5” rating) cite *overall satisfaction in general* (14%) as their primary reason. In addition, 11% indicate *the service is frequent, available, and/or reliable*.
- Riders reporting low satisfaction with public transit (1-3 rating) cite a need *to increase the frequency and/or a need for earlier/later hours* (22%) and *need for better routes* (15%) as their primary reasons. The next most frequently mentioned reason for their dissatisfaction is *rude drivers* (5%).
- This year, over eight in ten riders (83%) indicate they are likely to recommend public transit service. This represents a significant increase over last year (up from 78%) and is also a four-year high. This increase is mainly attributable to an increase in the percentage of riders who claim they are “very likely” to recommend public transit service (60%, up from 54%).
- Similar to likelihood to recommend, the likelihood to continue riding public transit one year from now also increased significantly from last year (77%, up from 72% for top two box ratings).

Key Drivers and Loyalty Segments

- **As found last year, for overall satisfaction, 6 of the 7 key drivers are related to operational elements related to availability, travel time, on-time performance and transfers** (*availability of service when needed* .501, *ability to transfer between buses* .465, *service available to the places you need to go* .450, *total travel time* .449, *working order of the buses* .449, *availability of bus shelters* .427). The seventh key driver is related to value (*value of service for fare paid* .423). Value surfaced as a key driver in 2010, but its correlation with satisfaction is not as strong as it was last year.

- The top three drivers for likelihood to recommend are *availability of the service when needed* (.430), *service available to the places you need to go* -.411, and *total travel time* -.378)

Five different loyalty segments were identified using rider answers to three questions: *Overall satisfaction with the bus system in the Valley*, *likelihood to recommend the bus service*, and *likelihood to be riding the bus one year from now*.

- Although not significant, the percentage of Loyal Advocates and Secure Riders increased this year (26% for Loyal Advocates which represents a four year high and 40% for Secure Riders). There was a significant decrease in At Risk riders (7%, down from 10% in 2010 which is a four-year low). The increase in Loyal Advocates and Secure Riders coupled with the decrease in At Risk Riders is a very positive sign for rider support for the transit system.
- **Loyal Advocates:** Riders who are completely satisfied (100% give a “5” or “very satisfied” rating) for overall satisfaction, likelihood to recommend and likelihood to be using public transit in a year from now. These riders also provided the highest “4 and 5 ratings” of all of the segments for their satisfaction with both the bus and light rail elements. This group of riders is more likely to be female than male, Caucasian vs. Non-Caucasian, and are more likely than other groups to be age 55 or older. They are the least likely group to be using transit to get to work and more likely than riders in some of the other groups to use transit for personal business, recreational trips, or medical appointments. They are equally as likely as unlikely to have a driver’s license but less likely to have access to a vehicle. They ride the bus six to seven days in an average week and claim to be riding public transit more often than a year ago.
- **Secure Riders:** Secure riders are those who are both satisfied and likely to be using transit in one year (give a “4” or “5” rating on both measures), but to a slightly lesser extent than loyal advocates. These riders, however, are more likely to provide a “4” instead of a “5” rating for overall satisfaction (86% vs. 13%). They are also extremely likely to recommend transit service to others, as 94% provide “4 or 5” ratings for this measure. This group of riders appears to be comprised of more men. They are more likely than Loyal Advocates and Vulnerable Satisfied riders to use transit to get to work. They take advantage of all transit choices (buses, light rail, and circulators), and claim to be using public transit more often than a year ago.
- **Vulnerable Captive Riders:** Riders who are unsatisfied (100% give a “1 to 3” rating for overall satisfaction), but are likely to be riding the bus in a year (100% of riders provide a “4” or “5” rating). This group of riders is the only group that is equally likely to be male or female. They tend to be slightly younger Caucasians who live alone, do not have ready access to a car, have lower incomes and have been using public transit for many years and report that their transit usage has stayed the same over the past year. They also are more likely than users in most other segments to report transit usage to a wider variety of locations.

- **Vulnerable Satisfied Riders:** These riders are those who are satisfied with the bus system overall (provide a “4” or “5” rating), but are unlikely to be riding the bus in one year (provide a “1”, “2”, or “3” rating). This group of riders is male with higher annual household incomes attributable to two wage earners. They, as well as their family members, have drivers’ licenses and access to vehicles and have used public transportation for under two years. They have high incidences of cell phone ownership and Internet access and have a propensity to use technology to access transit information. Although transit appears to be meeting their needs currently, it is likely they see this as a temporary situation that will change.
- **At Risk Riders:** Riders who are neither satisfied with the bus service in the Valley (give “1” to “3” satisfaction ratings) nor likely to be riding the bus one year from now (“1” to “3” likelihood ratings). In addition, they provide the lowest percentage of “4” and “5” rating for likelihood to recommend (31%) and have the lowest percent of “4” and “5” ratings of all of the segments for their satisfaction with both the bus and light rail elements. These riders skew toward males who have higher unemployment rates, earn less annually and have less access to a vehicle. They ride local buses and circulators and many claim to be using public transit less often than one year ago. They are less accustomed to using technology to access transit information and prefer more traditional sources.

Route Information and Assistance

- The transit book remains the primary source for information about public transit (50%). It has, however, experienced a significant decline since last year (down from 66%). The Valley Metro telephone line and Internet sources are the second most frequently mentioned sources for transit information (42% and 40%, respectively).
- Text messaging is the most commonly used application riders use to communicate or stay in touch with others (53%). Facebook (32%) and email using a cell phone or handheld device (31%) are the next most popular applications utilized. Although utilized, websites (9%), MySpace (8%), Twitter (4%) and Google (4%) are less popular.
- Seven in ten (71%) of all riders claim they would be “very or somewhat likely” to use a cell phone or some other handheld device to get transit information.

Conclusions

This year, many of the significant changes in rider attributes that occurred last year were sustained, i.e., income, employment, luxury item ownership, and respondents with a valid driver's license. There are several factors with the potential to impact these variables, with the two primary factors being the methodology switch from telephone only to telephone and intercept in 2010 and the continued sluggish economic challenges facing Valley residents. Results need to be interpreted in light of both these changes. However, it is apparent that intercept interviewing provides access to a broader swath of riders and is more representative of this population than only using telephone interviews to measure rider habits, attitudes and satisfaction with the service VM provides.

1. Light rail ridership continues to grow and expand the base of transit users in the Valley. The average number of years of transit use has declined (meaning there are more new users), while the frequency of light rail usage each week has increased and the percentage of light rail only riders who indicated they are using transit more than last year also increased. In addition, light rail only users are the rider group reporting the highest likelihood to be using public transit one year from now.
2. Overall satisfaction with the transit system among all riders increased this year to the highest level since 2005. In general, satisfaction with the individual bus and light rail elements remained the same compared to 2010, however, there were significant increases in some of the key driver attributes, which are likely responsible for the increase in overall satisfaction: ease of fare payment, value of service for fare paid, availability of service and availability of bus shelters.
3. In a shift from last year, there was a notable increase in the percentage of transit users indicating they are likely to continue using transit next year. This stability in ridership is also reflected in the higher percentage of riders that fall into the Loyal Advocate and Secure Rider segments. This points toward an increased belief among riders that public transit is a viable transportation option in the Valley.
4. It appears that the rider angst about the increase in fares that occurred in the spring of 2010 was short lived. There were fewer complaints about the price of transit being too high and an increased level of satisfaction with the value of service for the fare paid.
5. After increasing last year, the percent of riders indicating they primarily use the Transit Book for transit information decreased. There also was a significant increase in the percentage of users indicating they use their cell phone to get transit information. This shift, along with the fact that almost half of all riders indicate they are "very likely" to use their phone or another hand-held device in the future to retrieve transit information, shows that Valley Metro should continue to encourage and support the development of mobile accessibility to transit information. However, a majority of rider still rely on the Transit Book, so this remains to be an important tool for riders.

I. Introduction

A. Methodology

Valley Metro periodically conducts rider satisfaction surveys to monitor overall level of satisfaction among bus riders with the bus operators and the service. This report presents the results of the fourteenth Rider Satisfaction Tracking Survey, which was conducted in April 2011. It is important to note that in 2009, after light rail was introduced to the Valley, the survey instrument was updated to include light rail users.

Data for the rider satisfaction study in 2011 was collected using two methodologies – telephone and intercept interviews. The telephone sample was primarily taken from a database of riders generated from the Valley Metro 2007 Origin and Destination database, respondents to previous rider satisfaction studies, and WestGroup’s panel respondents who indicated public transit usage. A total of 761 interviews were completed; 561 by intercept and 200 by telephone. Subgroups analyzed within the report are bus-only riders (n=247), all light rail riders (n=494), bus and light rail combination users (n=367) and light rail-only users (n=127). The overall margin of error for the study is $\pm 3.4\%$ at the 95% confidence level. Both the intercept and telephone surveys took approximately 12 minutes to complete. Riders interviewed as part of the intercept portion of the study were offered a one-day pass as an incentive to complete the survey.

The intercept location and number of completes per location for the rider survey are shown in the table below.

**Number of Riders Interviewed
by Intercept Location**

Location	Number Completed	Percent of Total Sample
Central Station	54	7%
Sycamore/Main Transit Center	45	6%
Washington Street Transit Center	53	7%
Metro Center Transit Center	45	6%
Desert Sky Transit Center	45	6%
Tempe Transit Center	42	6%
Paradise Valley Transit Center	31	4%
Ed Pastor Transit Center	34	5%
Montebello and 19 th Ave. bus stop	33	4%
Arrowhead Town Center	37	5%
Arizona Mills Mall	44	6%
Superstition Springs Transit Center	29	4%
Sunnyslope Transit Center	29	4%
Chandler Fashion Center	20	3%
Loloma Station	20	3%

The table below shows the breakdown of completed interviews with transit users by city of residence of the respondent.

City	2011	2010	2009
Phoenix	56%	64%	61%
Mesa	12%	9%	8%
Tempe	10%	9%	8%
Glendale	7%	4%	6%
Scottsdale	3%	4%	3%
Chandler	2%	4%	6%
Peoria	1%	1%	2%
Gilbert	1%	1%	2%
Avondale	1%	1%	1%
Goodyear	--	--	1%
Other	4%	3%	2%

B. Characteristics of the Sample

This year, many of the significant changes in the demographic attributes of riders that occurred last year were sustained, i.e., income, employment, luxury item ownership, and respondents with a valid driver's license. These changes may be attributable to economic conditions; however, it is important to note a portion of the shift is also likely attributable to changing the methodology from telephone-only to primarily intercept interviews with some telephone supplementation that began in 2010.

This year, a little over half of the sample is male (54%) and a little under half of the sample is female (46%).

When reviewing the demographic characteristics from the 2011 rider study compared to 2010 there are some statistical significant differences.

- The average age of riders increased from 39.8 to 38.2 years, which represents a return to the average age of respondents in 2005.
- The household income of the sample is virtually unchanged from last year as respondents report earning an average of \$36,600 annually. The significant decline in income from 2009 to 2010 was sustained.
- A little over two in five transit users (42%) report full time employment, one in five report being a student (20%) and a little under one in five report being employed part time (18%).
- The significant decrease in cell phone and car ownership that occurred in 2010 was also sustained this year. Eight in ten (81%) riders report owning cell phones while four in ten report owning a car (40%). The number of cars owned per household has returned to 2009 levels with significantly more riders reporting two or more cars in their household compared to 2010 (31%, up from 18%).
- Respondents with a valid drivers' license continues to decrease (72% in 2009 to 57% in 2010 to 54% in 2011).
- There has been an increase among those who claim to have one child in the household (24%, up from 18% in 2010).

Table 1a: Summary of Demographic Characteristics

Demographics	2011	2010	2009	2008	2006	2005	2004	2003	2002
Gender									
Male	54%	59%	49%	50%	50%	52%	50%	56%	50%
Female	46%	41%	51%	50%	50%	48%	50%	44%	50%
Age									
Under 25	26%	26%	15%	20%	25%	30%	23%	28%	29%
25 to 54	55%	51%	60%	57%	59%	45%	58%	55%	48%
55 and older	18%	20%	24%	21%	16%	21%	19%	17%	21%
Refused	1%	3%	1%	2%	-	4%	-	-	2%
Average	38.2	39.8	43.0	41.2	39.1	38.9			
Ethnic Origin									
White	48%	50%	59%	60%	64%	58%	56%	58%	61%
Hispanic	23%	20%	16%	15%	19%	23%	21%	21%	18%
Black	15%	14%	10%	11%	11%	12%	17%	12%	9%
Other	8%	10%	12%	10%	6%	5%	6%	9%	12%
Refused/na	6%	6%	4%	4%					
Income									
< \$20,000	37%	35%	25%	26%	40%	48%	53%	38%	39%
\$20,001 to \$30,000	18%	17%	15%	15%	26%	18%	19%	21%	19%
\$30,001 to \$60,000	27%	29%	28%	31%	27%	27%	19%	33%	29%
\$60,000+	18%	19%	32%	28%	7%	6%	9%	8%	13%
Avg. in ,000	\$36.6	\$35.6	\$45.5	\$39.7	\$28.0	\$23.3			
Employment									
Full-time	42%	38%	56%	61%					
Student	20%	19%	12%	13%					
Part-time	18%	19%	14%	12%					
Unemployed	15%	17%	11%	8%					
Retired	9%	8%	9%	6%					
Disabled	3%	2%	2%	4%					
House spouse	1%	1%	1%	1%					

***Bold** indicates significantly higher percentages at the 95% confidence level

Table 1b: Miscellaneous Sample Characteristics

Demographics	2011	2010	2009	2008
Ownership of cell phone	81%	77%	84%	80%
Ownership of car	40%	38%	61%	55%
Have valid driver's license	54%	57%	72%	67%
Internet Access	78%	80%	83%	79%
People in HH				
One	20%	23%	21%	19%
Two	26%	27%	28%	29%
Three	18%	16%	18%	17%
Four or more	32%	26%	31%	33%
DK/Refused	4%	8%	2%	2%
Avg.	3.0	2.8	3.0	3.0
Children <18 in HH (among those with more than 1 person in HH)				
Zero	19%	22%	54%	52%
One	24%	18%	18%	20%
Two	16%	14%	14%	16%
Three	5%	6%	7%	6%
Four or more	2%	5%	5%	3%
DK/Refused	32%	35%	2%	3%
Avg.	1.3	1.3	.9	.9
Cars in HH				
Zero	7%	10%	25%	28%
One	30%	28%	32%	32%
Two	31%	18%	27%	26%
Three	11%	7%	10%	8%
Four or more	4%	3%	4%	3%
DK/Refused	17%	34%	2%	2%
Avg.	1.7	1.5	1.4	1.3
Drivers with valid license in HH				
Zero	3%	5%	8%	8%
One	19%	32%	21%	21%
Two	20%	30%	47%	46%
Three	8%	9%	16%	15%
Four or more	5%	3%	6%	7%
DK/Refused	46%	21%	2%	3%
Avg.	1.9	2.0	2.0	2.0

Demographics	2011	2010	2009	2008
People employed in HH				
Zero	4%	6%	10%	6%
One	30%	34%	28%	23%
Two	30%	28%	43%	46%
Three	9%	8%	11%	15%
Four or more	5%	3%	6%	7%
DK/Refused	21%	21%	2%	3%
Avg.	1.8	1.6	1.8	2.0

***Bold** indicates significantly higher percentages at the 95% confidence level

II. Rider Characteristics

A. Length of Time Using Public Transit

This year, the average number of years of public transit usage reported by riders decreased from 7.6 years in 2010 to 6.7 years. This is attributed to the fact that significantly more riders report riding the bus for two years or less (39%, up from 30% in 2010). This increase in newer users is likely due, at least in part, to the continued and increased use of light rail by users who had not used transit in the Valley prior to the addition of light rail to the system. In addition, significantly fewer transit users report riding the bus for six to 10 years. Riders under 34 years of age reported shorter average usage (5.0 years vs. 7.4 for 35 to 54 year olds and 10.2 for those 55+ years of age).

Currently, six in ten riders (60%) report using public transit for five years or less while four in ten (38%) report riding for six years or more.

Table 2a: History of Public Transit Usage in Phoenix

Time Period	2011 (n=761)	2010 (n=729)	2009 (n=717)	2008 (n=653)	2006 (n=544)
<6 months	10%	9%	4%	2%	7%
6 to 12 months	11%	8%	2%	13%	13%
1-2 years	18%	13%	15%	21%	26%
3-5 years	21%	24%	31%	26%	28%
6-10 years	17%	21%	21%	17%	15%
11-20 years	13%	15%	15%	14%	6%
20 years +	8%	10%	11%	7%	4%
Don't know/refused	2%	--	1%	--	--
Avg. in yrs	6.7	7.6	8.1	6.8	4.8

Q1: How long have you been using public transit as a means of transportation in the Valley?

***Bold** indicates significantly higher percentages at the 95% confidence level

*Note: This question was changed in 2009 to reference “public transit” where previously the question was asked about “the bus”.

The average number of years riding public transit reported by light rail only riders is lower than levels reported for the other rider categories (4.0 years vs. 6.3 to 7.1 years for other users. In fact, the average length of transit usage among this rider group has returned to 2009 levels after an uptick in 2010 (6.2 years in 2010 and 3.9 years in 2009).

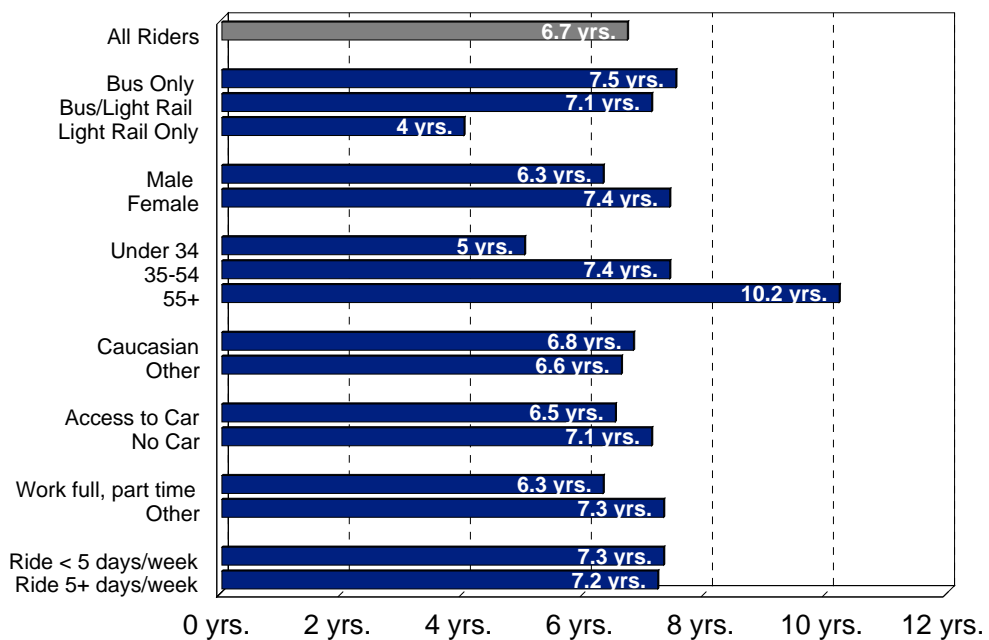
Table 2b: Public Transit Usage by Mode

Time Period	Total Riders (n=761)	Bus Only Riders (n=267)	All Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
<6 months	10%	12%	9%	8%	13%
6 to 12 months	11%	8%	13%	12%	16%
1-2 years	18%	14%	21%	16%	35%
3-5 years	21%	22%	20%	22%	16%
6-10 years	17%	18%	16%	19%	9%
11-20 years	13%	15%	12%	13%	7%
20 years +	8%	10%	8%	9%	3%
Don't Know	2%	2%	1%	1%	2%
Avg. in yrs	6.7	7.5	6.3	7.1	4.0

***Bold** indicates significantly higher percentages at the 95% confidence level

History of Public Transit Usage

How long have you been using public transit as a means of transportation in the Valley?



1. Frequency of Riding the Bus

A downward trend in the percentage of riders who report riding the bus five days a week continues (21% down from 26% in 2010 and 36% in 2009). Conversely, one third of riders continue to report riding the bus six or more days a week, indicating the significant increase that occurred from 2009 to 2010 may be a trend. The percentage of those who ride the bus four days or less has remained relatively stable over time. The ‘typical’ bus rider rides the bus 4.3 days per week on average, a figure that is higher among those who do not have access to an automobile (5.9 days) and those who use passes (4.6).

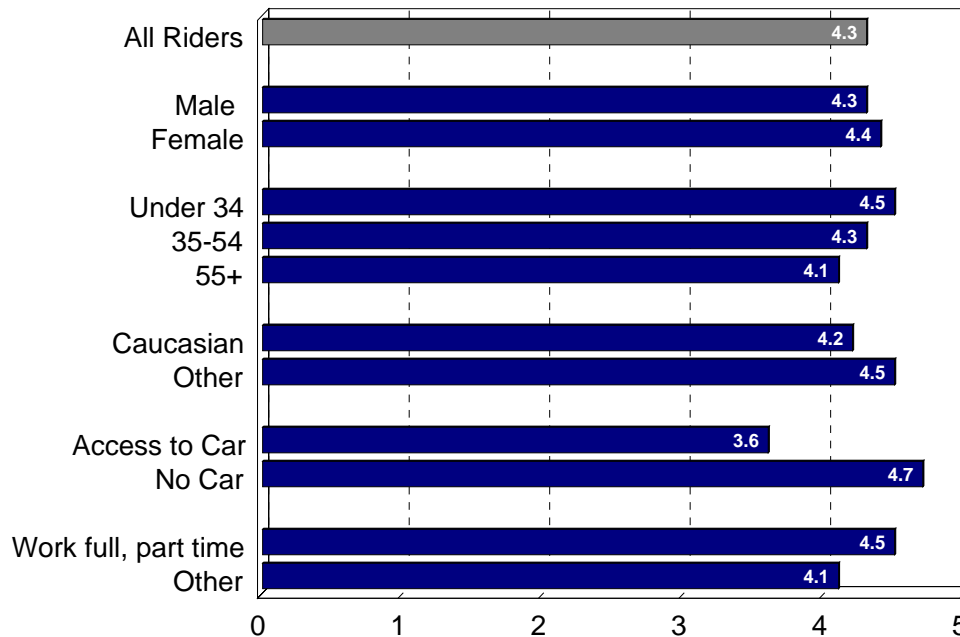
**Table 3: Frequency of Riding Bus Each Week
Among Bus Riders**

Frequency	2011	2010	2009	2008	2006	2005	2004	2003	2002
Less than 1x/ wk	7%	5%	6%	2%	1%	3%	1%	3%	5%
One day	5%	3%	7%	4%	2%	3%	4%	3%	5%
Two days	8%	7%	9%	6%	7%	8%	7%	7%	8%
Three days	12%	10%	11%	10%	9%	11%	10%	10%	9%
Four days	14%	13%	15%	16%	13%	10%	11%	12%	10%
Five days	21%	26%	36%	39%	31%	39%	40%	40%	39%
Six to Seven days	33%	35%	16%	23%	37%	26%	27%	25%	24%

Q2: In an average week, how many days a week do you ride the bus? (This does not include light rail trips) *Note: Question changed in 2008 from “on average” to “in an average week.” *Bold indicates significantly higher percentages at the 95% confidence level

Average Bus Weekly Usage

In an average week, how many days do you ride the bus?



2. Frequency of Riding the Light Rail

Light rail riders report they use the light rail system an average of 1.2 days more frequently today (3.2 days) than in 2009 (2.0 days). Light rail only riders report riding the light rail an average of one day a week more than combination riders (3.8 vs. 2.8 days). Older riders report riding light rail the least number of days per week (2.3 vs. 3.2 for 35-54 year olds and 3.5 for under 34 years of age).

Table 4: Frequency of Riding Light Rail Each Week Among Light Rail Riders

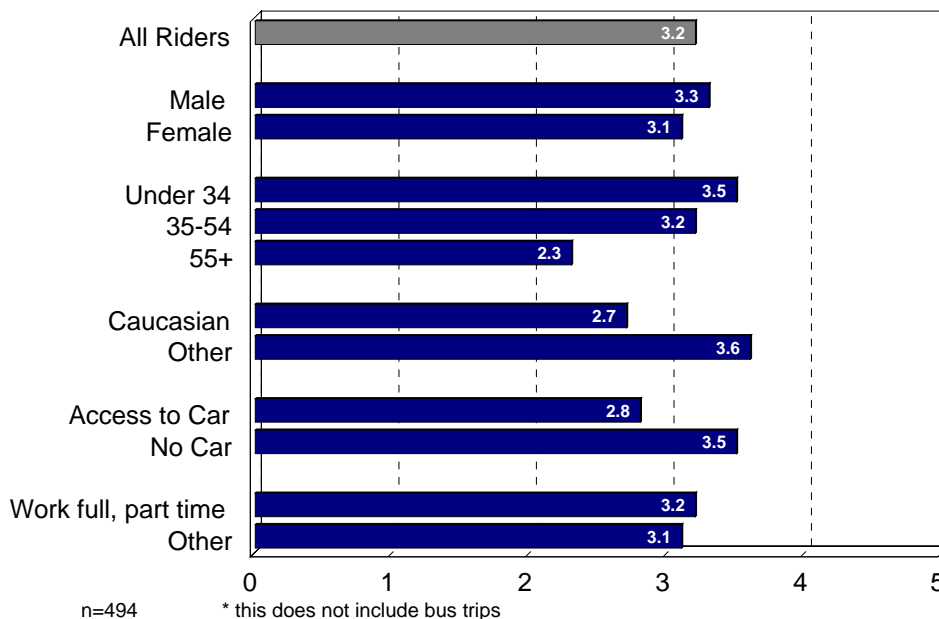
Frequency	2011 Total (n=494)	2010 Total (n=500)	2009 Total (n=360)	Bus/Light Rail (n=367)	Light Rail Only (n=127)
Less than 1x/ wk	20%	25%	33%	20%	19%
One day	13%	12%	22%	16%	6%
Two days	11%	11%	11%	12%	16%
Three days	11%	9%	8%	12%	9%
Four days	7%	8%	5%	6%	10%
Five days	15%	16%	13%	12%	25%
Six to Seven days	19%	16%	4%	17%	25%
Don't know/Refused	3%	2%	4%	4%	--
Average	3.2	3.0	2.0	2.8	3.8

*Q3: In an average week, how many days a week do you ride the light rail? (This does not include bus trips) *Note: Question originated in 2009.*

****Bold** indicates significantly higher percentages at the 95% confidence level

Average Light Rail Weekly Usage

In an average week, how many days do you ride the light rail?



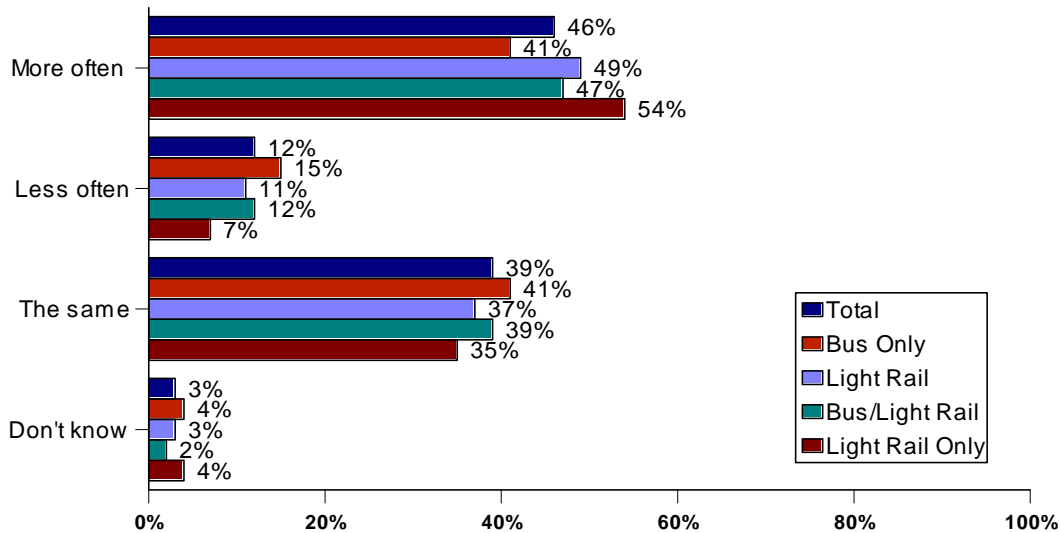
C. Change in Frequency of Using Public Transit

Almost half of all riders (46%) report riding public transit more often than a year ago. This level is unchanged from 2010. However, light rail only users are slightly more likely to claim they are riding public transit more often than their counterparts in the other transit type categories (54% versus 41% to 49% for other categories). Additionally, riders under 34 years of age (53% vs. 40% for 35+) and non-Caucasians (53% vs. 39% for other ethnicities) claim to be using public transit more often

The main reasons for using public transportation less often than last year are as follows: I now have a car (17%), prices are too high (14%) and the rider is carpooling more (12%). Mentions of prices being too high have dropped significantly from 2010 (from 29% to 14%). Bus-only riders report taking advantage of carpooling more often than all light rail riders.

Change in Frequency of Using Public Transit

Compared to one year ago, would you say you are using transit more often, less often or the same as you did a year ago?



Total Riders: n=761; Bus Only: n=267; Light Rail: n=494; Bus/Light Rail: n=367; Light Rail Only: n=127

Table 5: Reason Using Public Transit Less Often
Among those using public transit less often than they did one year ago

Reason	Total Riders (n=94)	Bus Only Riders (n=40)	All Light Rail users (n=54)	Bus/Light Rail Riders (n=45)
I also have a car/ have a car now	17%	18%	17%	20%
Price is too high	14%	12%	15%	18%
Carpool more	12%	20%	6%	4%
Don't have a job anymore/ unemployed/ retired	6%	2%	9%	9%
Moved closer to work/store	6%	8%	6%	4%
Health problems/can't walk	6%	8%	6%	7%
Bus doesn't run the hours I need	5%	5%	6%	7%
Don't go to school anymore	5%	10%	2%	2%
Work too far from home	4%	5%	4%	2%
Ride bike	4%	5%	4%	4%
Don't have anywhere to go	3%	-	6%	7%
Had to go to different places/more places	2%	-	4%	4%
Work schedule changed	1%	2%	-	-
Other	10%	10%	11%	9%
DK/Refused	7%	5%	9%	4%

QNEWIA: Why do you think you are using public transit less often than you were one year ago?

*Question originated in 2010

****Bold** indicates significantly higher percentages at the 95% confidence level

Note: sample size for light rail only riders was too low to report.

D. Days of the Week Using Public Transit

Although transit usage on weekdays has decreased significantly from last year, weekday ridership remains high (91%). Transit usage on Saturday and Sunday sustains the high levels reached in 2010 (68% and 52%, respectively), indicating a trend to use public transportation more often on the weekend may be occurring.

Bus-only riders have a higher propensity to claim they ride the bus on weekdays than their counterparts in other transit categories (93% vs. 87% - 90%). Additionally, bus-only riders have the lowest propensity to ride the bus on Sundays (41% vs. 50% to 60%).

In addition, those most likely to use public transit on the weekend are:

- Riders without access to a vehicle (89% ride Saturday; 61% ride Sunday).
- Non-Caucasian riders (71% ride Saturday, 56% ride Sunday).

Table 6a: Days of the Week Using Public Transit

Day of the Week	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Monday through Friday	91%	94%	90%	96%
Saturday	68%	71%	50%	46%
Sunday	52%	54%	34%	30%

Q4: In general, do you use public transit...?

*Note: This question was changed in 2009 to reference “public transit” where previously the question was asked about “the bus”.

***Bold** indicates significantly higher percentages at the 95% confidence level

Table 6b: Days of the Week Using Public Transit by Mode

Day of the Week	2011 Riders (n=761)	Bus Only Riders (n=267)	All Light Rail Users (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Monday through Friday	91%	93%	90%	91%	87%
Saturday	68%	59%	72%	74%	68%
Sunday	52%	41%	58%	60%	50%

***Bold** indicates significantly higher percentages at the 95% confidence level

E. Time of Day Using Public Transit

Approximately the same proportion of riders claim to be using public transit in the morning hours while fewer claim to be using it in the early evening hours. Specifically, the percent of riders reporting public transit usage has decreased significantly from 2010 during the 3 pm to 6 pm time period (51%, down from 69%). Ridership during the mid-day also declined compared to 2010 (52%, down from 58%). Ridership continues to be lowest before 6 am and after 9 pm.

Table 7a: Time of Day Using Public Transit

Times	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Before 6 am	18%	17%	16%	21%
6 am to 9 am	61%	63%	62%	63%
9 am to 3 pm	52%	58%	36%	37%
3 pm to 6 pm	51%	69%	64%	67%
6 pm to 9 pm	43%	42%	24%	28%
After 9 pm	21%	22%	11%	14%

Q6: What times of the day do you usually use public transit? Multiple responses allowed. *Note: This question was changed in 2009 to reference “public transit” where previously the question was asked about “the bus.”

***Bold** indicates significantly higher percentages at the 95% confidence level

As shown in Table 7b below, time of day usage patterns for bus only riders are different than riders in the other categories in that they tend to use public transportation during the traditional commuting hours. The other riders also use public transportation during the commuting hours; however, significantly more use the transportation before 6am and after 6pm than bus only riders.

Table 7b: Time of Day Using Public Transit by Mode

Times	Total Riders (n=732)	Bus Only Riders (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Before 6 am	18%	13%	21%	21%	22%
6 am to 9 am	61%	67%	58%	60%	49%
9 am to 3 pm	52%	49%	53%	54%	49%
3 pm to 6 pm	51%	44%	55%	57%	50%
6 pm to 9 pm	43%	32%	49%	48%	50%
After 9 pm	21%	10%	28%	26%	32%

***Bold** indicates significantly higher percentages at the 95% confidence level when compared to total

F. City in which Most Frequently Use Public Transit

Public transit usage within the Phoenix city limits remains significantly higher than for any other city named; with 79% of riders stating they use public transit ‘most often’ in Phoenix. However, a significant decrease occurred in riders claiming to travel in Phoenix from last year (83%) to this year (79%).

The percentage of riders indicating they travel around ‘most often’ in Tempe continued to climb this year (35%; up from 31% in 2010 and 26% in 2009). This increase continues to be attributed to the usage of light rail; light rail only users are significantly more likely to cite Tempe as the city they travel around most often compared to those that only ride the bus (64% vs. 20%).

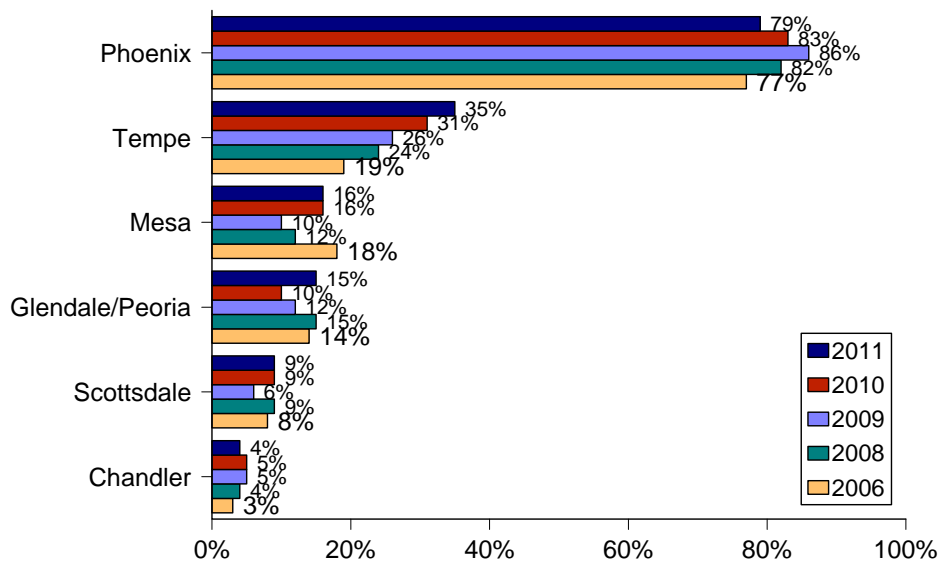
The percentage of riders indicating they travel around ‘most often’ in Glendale increased significantly from last year (15%, up from 10%) and is mainly attributed to bus only riders (23% vs. 2% to 9% for riders on other transit categories).

Riders over 35 years of age report traveling within the city limits of Phoenix more often than younger riders (84% vs. 73% for younger riders). Conversely, riders under 34 years of age report traveling within Tempe city limits more often than older riders (40% vs. 30%).

Transit usage in Mesa, Scottsdale and Chandler is identical to last year.

Top Cities Most Often Traveled

What city do you travel around most often using public transit?



*Note: This question was changed in 2009 to reference "public transit" where previously the question was asked about "the bus".

Table 8a: City Most Often Traveled Around: Total Mentions

City	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)	2006 (n=544)
Phoenix	79%	83%	86%	82%	77%
Tempe	35%	31%	26%	24%	19%
Mesa	16%	16%	10%	12%	18%
Glendale/Peoria	15%	10%	12%	15%	14%
Scottsdale	9%	9%	6%	9%	8%
Chandler	4%	5%	5%	4%	3%
Peoria	3%	2%			
Avondale	1%	2%	1%	1%	--
Gilbert	1%	1%	1%	1%	--
Other	2%	2%	1%	1%	3%

Q7: What city do you travel around most often using public transit?

*Note: This question was changed in 2009 to reference “public transit” where previously the question was asked about “the bus.”

Table 8b: City Most Often Traveled Around by Mode

City	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Users (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Phoenix	79%	78%	79%	82%	73%
Tempe	35%	20%	43%	36%	64%
Mesa	16%	10%	19%	18%	22%
Glendale/Peoria	15%	26%	9%	12%	2%
Scottsdale	9%	8%	9%	11%	5%
Chandler	4%	5%	3%	4%	-
Peoria	3%	4%	2%	3%	-
Avondale	1%	2%	-	-	-
Gilbert	1%	1%	1%	1%	1%
Other	2%	2%	1%	2%	-

***Bold** indicates significantly higher percentages at the 95% confidence level

G. Vehicle Available

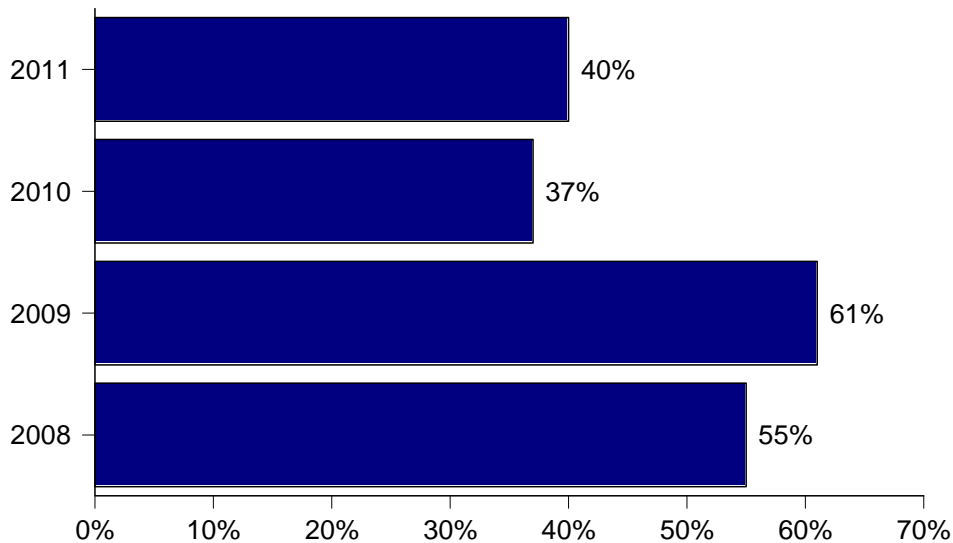
Three in five riders (60%) do not have a car available to them, even on an occasional basis. This is similar to the 2010 vehicle availability levels reported which represented a significant increase from 2009 where only two in five (39%) did not have a car available to them. Those who ride light rail exclusively are significantly more likely to have access to a car compared to those who ride the bus, either exclusively or in combination with the light rail (light rail exclusively (55% vs. bus only: 34% and bus and light rail riders: 38%).

In addition, those most likely not to have access to a car are:

- Riders under 34 years old (37% vs. 41% for those 35 to 54 and 46% for those 55 or older)
- Non-Caucasian riders (66% vs. 53% of Caucasian riders)
- Those who are not employed (70% vs. 51% for those employed)
- Frequent riders (5+ days a week) (68% vs. 55%)

Vehicle Available for Use

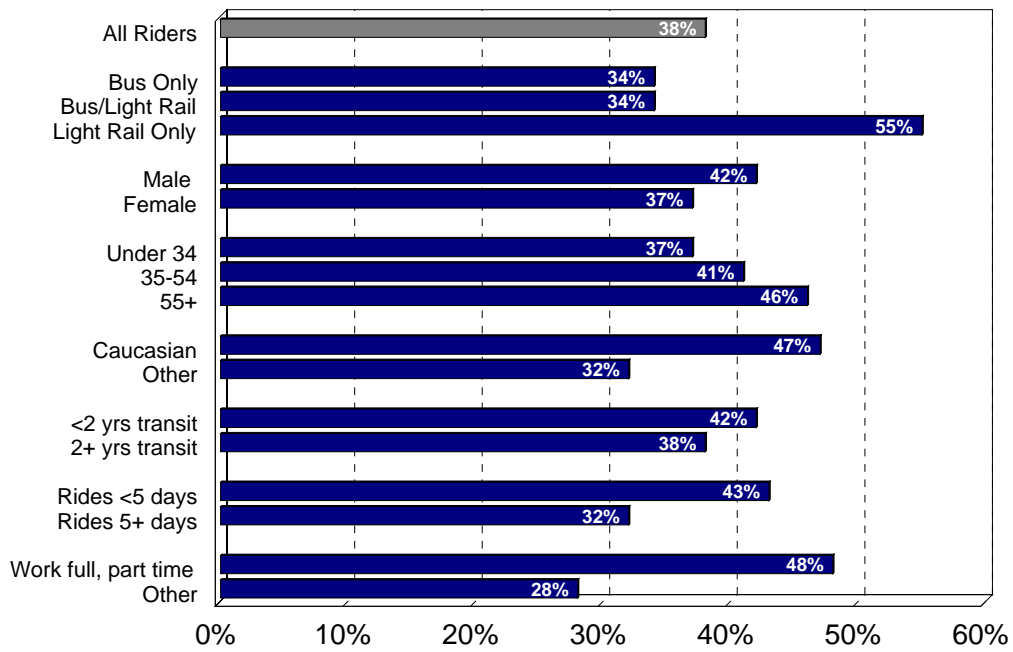
Do you have a car, in working condition, available for your personal use (even occasionally)?



2011 n=761; 2010 n= 732; 2009 n=717; 2008 n=653

Access to Vehicle

Do you have a car, in working condition, available for your personal use?



H. Driver's License

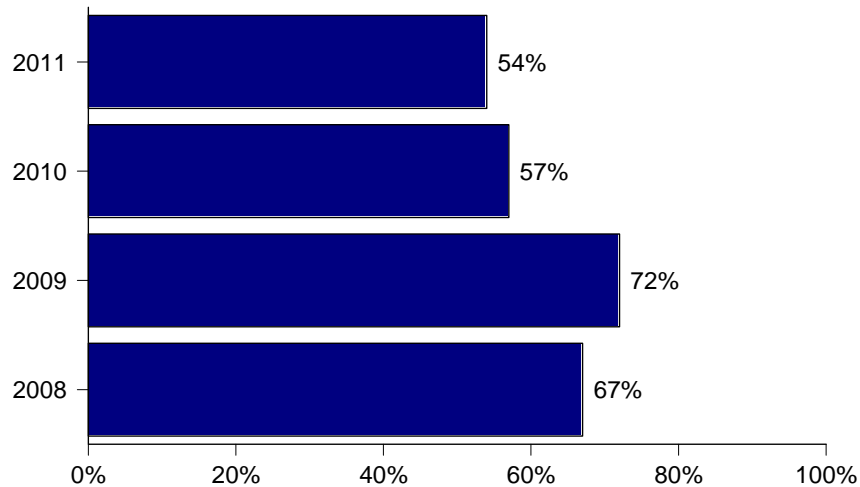
The significant decrease in the percentage of riders who claim to have a valid driver's license that occurred in 2010 is sustained this year. Currently a little over half report having a valid license (54%) while almost three fourths (72%) reported having one in 2009. Light rail only riders are significantly more likely than other riders to have a current, valid driver's license (64% vs. 49% for bus only riders; 56% for all light rail riders and 54% for bus/light rail riders).

In addition, those most likely to have a license are:

- Caucasian riders (63% vs. 43% of Non-Caucasian riders)
- Those who are employed (62% vs. 43% for those unemployed)
- Those over 35 years old (62% vs. 45%)
- Those who use a pass (57% vs. 48% who pay cash)
- Those who have access to a car (82% vs. 36%)

Driver's License

Do you have a valid drivers license?



2011 n=761; 2010 n=732; 2009 n=717; 2008 n=653

III. Trip Characteristics

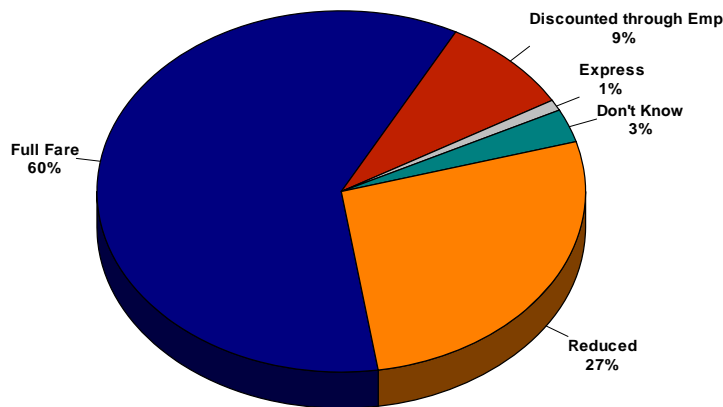
A. Type of Fare Paid

Riders are significantly more likely to report paying full fare for their transit trips this year (60%) compared to the last two years (53% in 2010 and 39% in 2009). Riders who indicate use of a discounted card purchased/provided by their employer has decreased significantly compared to the last two years (from 24% in 2009 to 12% in 2010 to 9% currently). Riders who report using a reduced fare has remained stable (27% vs. 26% in 2010).

Light rail only riders are more likely to report paying full fare than riders in the other transit categories (71% vs. 57% to 62% for the other categories).

Additionally, riders under 55 are more likely to report paying full fare (64% vs. 37%) while riders over age 55 are more likely to report taking advantage of a reduced or discounted fare (46% vs. 24% for reduced and 15% vs. 6%). Caucasians also report higher usage of a discounted fare (11% vs. 3%).

Type of Fare Payment



N = 761

Table 9a: Type of Fare Paid

Fare	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Full	60%	53%	39%	42%
Reduced	27%	26%	18%	24%
Discounted/Free through work/school	9%	12%	24%	27%
Express	1%	2%	6%	4%
Other	-	2%	5%	2%
Don't Know	3%	5%	8%	3%

Q10: Which fare do you pay?

**Bold indicates significantly higher percentages at the 95% confidence level*

Table 9b: Type of Fare Paid by Mode

Type of Fare	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Full	60%	57%	62%	58%	71%
Reduced	27%	31%	26%	28%	18%
Discounted/Free through employer	9%	10%	8%	9%	6%
Express	1%	-	1%	1%	-
Other	2%	1%	1%	1%	2%
Don't Know	3%	2%	3%	3%	3%

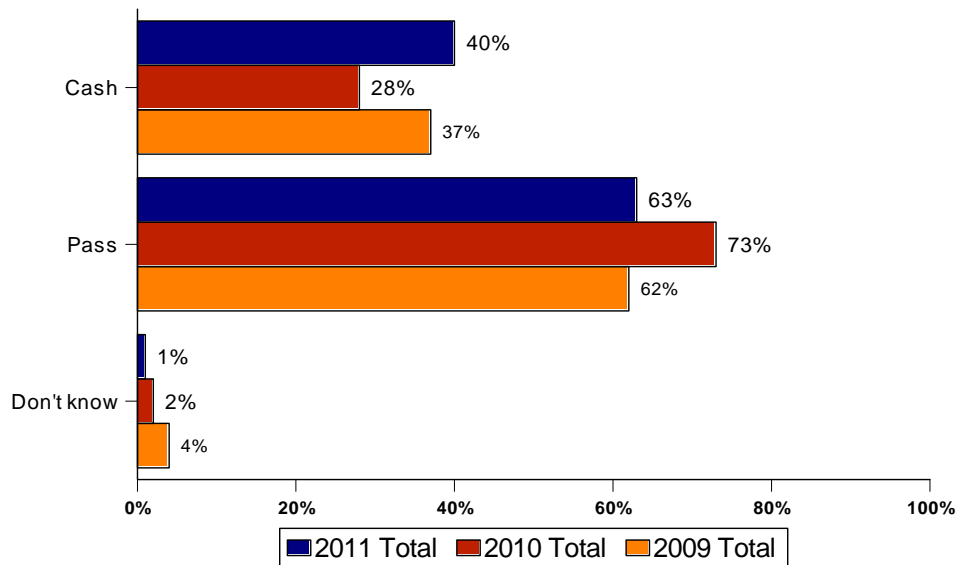
**Bold indicates significantly higher percentages at the 95% confidence level*

B. Type of Fare Payment

When riders were asked how they usually pay for their transit fare, significantly fewer riders reported using a pass this year (63%, down from 73% in 2010) while significantly more riders reported paying with cash (40%, up from 26% in 2010). The percentages reported by riders have returned to those reported in 2009.

Type of Fare Payment

How do you usually pay for your transit fare?



2011 Total: n=761; 2010 Total: n=732; 2009 Total: n=717

In addition, there are some demographic differences between those that use a pass and those that typically pay cash.

Riders most likely to use a *pass* are:

- Riders 35 years or older (72%)
- Employed riders (66%)
- Those that ride 5+ days (74%)

Riders most likely to use *cash* are:

- Riders under 35 (48%)
- Unemployed riders (44%)
- Those that ride <5 days (48%)

Among those who use a pass, less than four in ten (37%) indicate they use a monthly pass while exactly four in ten (40%) indicate they use an all-day, 3-day or 7-day pass. Riders who report using an all-day, 3-day or 7-day pass increased significantly for the second consecutive year (10% in 2009; 28% in 2010 and 40% today) while riders who report using a monthly pass has decreased significantly since 2010 (37%, down from 44%). This indicates the significant decline in riders who are using passes is mainly attributable to those who report using a monthly pass. A distant third in mentions for the most frequently mentioned pass type is the smart card/platinum card/Metro card (17%), which is identical to the levels reported by riders in 2010.

Riders over 35 years of age are more likely to use a smart card/platinum card/Metro card (24% vs. 6%). As expected, younger riders are more likely to use a student pass (20% vs. 1% for those over 35).

Table 10a: Type of Fare Payment

Payment Method	2011 Total (n=761)	2010 Total (n=732)	2009 Total (n=717)
Cash	40%	28%	37%
Pass	63%	73%	62%
Don't know	1%	2%	4%
Type of Pass	(n=487)	(n=533)	(n=443)
All day pass/3-day pass/7-day pass	40%	28%	10%
Monthly pass	37%	44%	34%
Smart card/Platinum card/Metro card	17%	16%	29%
College pass/student pass	9%	7%	9%
Employer pays for it	--	1%	5%
Handicapped card	--	1%	1%
Yearly pass	--	1%	2%
U-pass	--	1%	1%
Express bus pass	--	--	1%
Metro bus pass//bus pass	--	--	3%
Other	2%	2%	4%
Don't know	--	7%	21%

Q9a: How do you usually pay for your transit fare? Q9b: What type of pass do you use?

*Note: This question was changed in 2009 to reference "transit fare" where previously the question was asked about "bus fare". This question was also split into two where, previously, everyone was asked, "How do you usually pay for your bus fare?"

****Bold** indicates significantly higher percentages at the 95% confidence level

Bus Riders only or combo riders are significantly more likely to use a monthly pass (43% and 37% versus 23% for light rail-only riders), while light rail-only riders are significantly more likely to have a student pass (26% versus 3%-8% for other transit groups).

Table 10b: Type of Fare Payment by Mode

Payment Method	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Cash	40%	43%	38%	37%	41%
Pass	63%	60%	65%	67%	58%
Don't know	1%	1%	1%	1%	2%
Type of Pass	(n=478)	(n=159)	(n=319)	(n=246)	(n=73)
All day pass/3-day pass/7-day pass	41%	41%	41%	42%	37%
Monthly pass	37%	43%	34%	37%	23%
Smart card/Platinum card/Metro card	17%	17%	16%	17%	14%
College pass/student pass	9%	3%	12%	8%	26%
Other	2%	1%	3%	4%	1%
Don't know	--	--	--	--	--

***Bold** indicates significantly higher percentages at the 95% confidence level

Next, riders indicating they use a monthly pass or some type of day pass were asked where they usually purchase their pass; the most popular locations cited continue to be the “transit center” (43%) and the grocery store (42%). This year there was a significant increase in riders who report purchasing passes at the grocery store (from 30% to 42%). Vending machines are a distant second for places where passes are purchased (8%).

Table 10c: Location of Pass Purchase

Among those with a “monthly” pass or “all day/3-day/7-day” pass

Location	2011 Riders (n=408)	2010 Riders (n=375)	2009 Riders (n=189)
Transit Center	43%	42%	39%
Grocery Store	42%	30%	6%
Vending machine	8%	11%	4%
On the bus	5%	4%	12%
Employer	4%	4%	16%
Website	2%	2%	4%
Government office	2%	3%	3%
School	2%	4%	3%
Govt. office	2%	--	3%
Check cashing store	1%	2%	--
Library	1%	2%	4%
Automatic mail plan	1%	1%	4%
Magellan	-	1%	2%
CASS	-	1%	--
Light rail station/platform	-	1%	3%
Doctor office	--	1%	2%
Mall	--	2%	--
Other	5%	6%	3%
Don't know	2%	3%	3%

Q11: Where do you usually purchase your pass?

*Question originated in 2009

****Bold** indicates significantly higher percentages at the 95% confidence level

Light rail-only users purchase their pass at transit centers and vending machines significantly more than bus-only riders (62% vs. 32% and 21% vs. 0%). Those under 35 years old and over 55 are most likely to purchase their monthly pass at a transit center (44% for under 35, 36% for 35 – 54 and 57% for over 55).

Table 10d: Location of Pass Purchase by Mode
Among those with a “monthly” pass or “all day/3-day/7-day” pass

Location	2011 Riders (n=408)	Bus Riders Only (n=138)	Light Rail Riders (n=270)	Bus/Light Rail Riders (n=212)	Light Rail Only Riders (n=58)
Transit Center	44%	32%	49%	46%	62%
Grocery Store	42%	54%	36%	40%	21%
Vending machine	8%	--	12%	10%	21%
On the bus	5%	7%	4%	6%	--
Employer	4%	4%	4%	5%	2%
Website	2%	1%	2%	2%	--
Government office	2%	2%	2%	2%	--
School	2%	1%	2%	2%	--
Govt. office	2%	1%	1%	1%	--
Check cashing store	1%	1%	2%	2%	-
Library	1%	1%	2%	2%	-
Automatic mail plan	1%	2%	1%	1%	-
Magellan	-	1%	-	-	-
CASS	-	--	-	1%	-
Light rail station/platform	-	--	-	1%	-
Other	5%	--	-	1%	--
Don't know	2%				

Q11: Where do you usually purchase your pass?

*Question originated in 2009

****Bold** indicates significantly higher percentages at the 95% confidence level.

C. Other Types of Buses Ridden

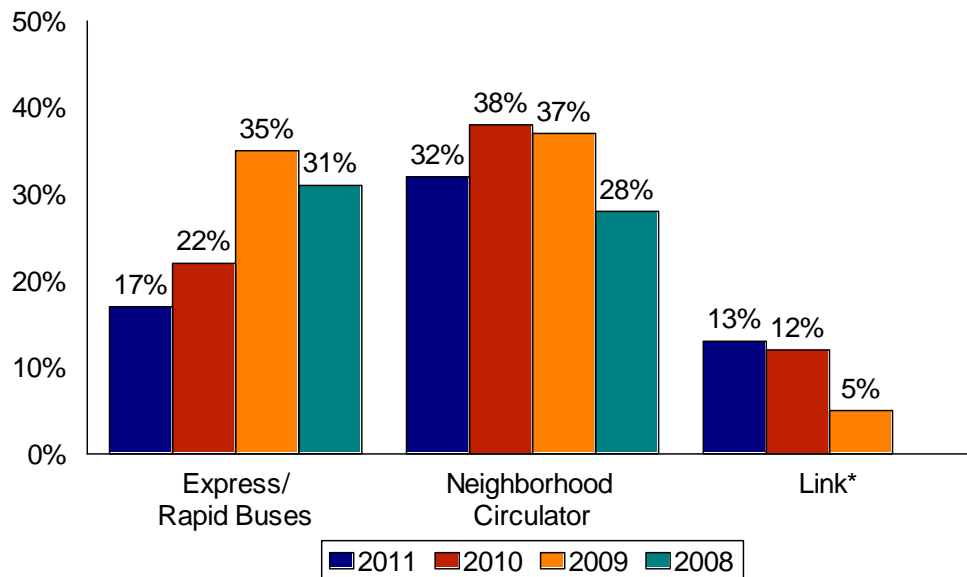
Fewer riders are reporting to use other types of buses than in the past. Specifically, riders reporting use of the neighborhood circulators and express/rapid buses decreased significantly. One third of riders report using neighborhood circulators (32%, down from 38%) while less than two in ten (17%) report using an express bus. Riders who report riding the Link remains unchanged from 2010 (13%) after a significant increase occurred from 2009 to 2010.

Express Bus ridership is higher among employed riders (21%), those over 35 years of age (23% vs. 10%), Caucasians (19% vs. 14%) and those who have access to a car (26% vs. 10%).

Circulator usage is higher among the unemployed (36% vs. 29%) and riders who use the bus 5+ days in an average week (40% vs. 31%). *Link* ridership is highest among the middle aged riders (19% vs. 11% four under 35 and 10% for over 35) and those who ride the bus 5+ days a week (18% vs. 10%).

Type of Bus Ridden

Do you ever ride...



2011: n=761; 2010: n=732; 2009: n=717; 2008: n=653

*Question originated in 2009

Light rail only riders report lower incidences of all bus types than their counterparts in other transit categories.

Table 11: Type of Bus Ridden by Mode

Bus type	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Express/RAPID	17%	17%	16%	20%	6%
Neighborhood Circulator	32%	19%	39%	47%	14%
LINK	13%	6%	18%	21%	9%

***Bold** indicates significantly higher percentages at the 95% confidence level

D. Trip Destination

Riders remain most likely to report using public transit to get to and from work than for any other reason (56%); this however, represents lowest reported percentage in the last five years (57% in 2010; 61% in 2009; 70% in 2008, and 66% in 2006). The next most frequently mentioned destinations include shopping (40%) visiting friends/relatives (28%) going to school (24%), taking care of personal business (24%), and recreational events (22%).

The percentages reported for all trip destinations are similar to those reported in 2010 except for taking care of personal business, which decreased significantly (24%, down from 30%).

The age of riders clearly plays a role in the public transit destination; for example, riders under 55 years of age are significantly more likely to use transit to get to work (59% vs. 46%) while riders under 35 years of age are significantly more likely to use transit to get to school and visit friends (42% vs. 9% and 32% vs. 25%, respectively). Additionally, those employed report riding public transit 5 days or more in an average week more often than unemployed riders (69% vs. 49%). They also have higher incidences of car ownership (63% vs. 52%).

Table 12a: Trip Destinations

Destinations	2011 Total (n=761)	2010 Total (n=732)	2009 Total (n=717)	2008 Total (n=653)	2006 Total (n=544)	2011 Age		
						<34 (n=303)	35-54 (n=267)	55+ (n=179)
Work	56%	57%	61%	70%	66%	55%	64%	46%
Shopping/ Restaurant	40%	42%	31%	32%	34%	36%	42%	50%
Visit relatives/ friends**	28%	28%	11%	15%	n/a	32%	27%	21%
School	24%	24%	14%	16%	18%	42%	10%	6%
Take care of personal business**	24%	31%	8%	13%	n/a	23%	27%	22%
Recreational events	22%	24%	16%	7%	23%	18%	24%	28%
Medical/dental appointments	17%	22%	10%	13%	13%	12%	20%	27%
Airport	3%	1%	1%	2%	-	4%	2%	2%
Church	1%	1%	2%	1%	-	--	1%	1%
Library	1%	1%	2%	1%	-	-	1%	2%
Downtown Phoenix	1%	-	1%	-	-	1%	1%	--
Home	--	-	2%	2%	-	-	1%	-
Everywhere	--	-	-	-	1%	--	-	--
Other	2%	1%	1%	1%	3%	1%	1%	2%
Don't know/NA	1%	-	2%	1%	1%	--	1%	1%

Q7b: In general, where did you go using public transit? Where else?

*Note: This question was changed in 2006 to reference trips "in general" where previously the question was asked in regards to "most recent trip."

*Note: This question was changed in 2008 to reference "using the bus" where previously the question was asked "using public transit."

**Categories were added in 2008

*Note: Question was changed back in 2009 to reference "using public transit" where previously the question was asked, "using the bus."

***Bold** indicates significantly higher percentages at the 95% confidence level

Riders who use the bus only or the bus and light rail together are significantly more likely to report using public transit to go shopping than those that only use the light rail exclusively (47% and 43% vs. 20%). They are also significantly more likely to take care of personal business (21% and 31% vs. 7%) and to go to medical/dental appointments (18% and 21% vs. 6%).

Table 12b: Trip Destinations by Mode

Destinations	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Work	56%	57%	56%	58%	51%
Shopping/ Restaurant	41%	47%	37%	43%	20%
Visit relatives/ friends**	28%	24%	30%	33%	23%
School	24%	20%	27%	25%	33%
Take care of personal business**	24%	21%	25%	31%	7%
Recreational events	22%	15%	<u>25%</u>	<u>28%</u>	17%
Medical/dental appointments	17%	18%	17%	21%	6%
Airport	3%	-	5%	5%	2%
Church	1%	1%	-	1%	-
Library	1%	1%	1%	1%	--
Downtown Phoenix	1%	1%	1%	-	1%
Other	2%	2%	1%	2%	-
Don't Know	1%	-	1%	1%	1%

***Bold** indicates significantly higher percentages at the 95% confidence level

E. Distance from Rider's Home to get onto Public Transit

Riders are traveling slightly longer distances to get to public transit stops; two in five riders (40%) currently report travelling less than one-quarter mile compared to 49% in 2010. Riders are slightly more likely to report travelling between one-quarter of a mile and two miles (35% vs. 28%).

Table 13a: Distance from Riders Home to Public Transit

Miles	2011 (n=761)	2010 (n=732)	2009 (n=579)	2008 (n=653)
Less than ¼ mile	40%	49%	38%	40%
¼ to ½ mile	18%	16%	14%	18%
½ to ¾ mile	4%	2%	4%	3%
¾ to 1 miles	5%	3%	5%	6%
1 to 2 miles	8%	7%	8%	9%
2 to 4 miles	8%	8%	9%	8%
More than 4 miles	13%	13%	20%	14%
Don't know	3%	2%	2%	3%

Q8: What is the distance, in miles from your home to where you typically get on public transit? *Note: Question originated in 2008. **This question was changed in 2009 to reference "public transit" where previously the question was asked "the bus."

***Bold** indicates significantly higher percentages at the 95% confidence level

Those who use the bus and light rail together are significantly more likely that light rail only users to travel less than one-quarter mile to get to a transit stop (46% vs. 20%), Light rail only riders are significantly more likely than their counterparts to travel one to more than four miles to reach their transit destination, the train stop (26% vs. 10% and 13%).

Table 13b: Distance from Riders Home to Public Transit by Mode

Miles	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Less than ¼ mile	40%	42%	39%	46%	20%
¼ to ½ mile	18%	21%	16%	17%	12%
½ to ¾ mile	4%	4%	4%	4%	7%
¾ to 1 miles	5%	4%	6%	5%	6%
1 to 2 miles	8%	5%	9%	8%	13%
2 to 4 miles	8%	9%	8%	8%	10%
More than 4 miles	13%	13%	14%	10%	26%
Don't know	3%	3%	3%	3%	6%

***Bold** indicates significantly higher percentages at the 95% confidence level

F. How Riders Travel to Public Transit

Walking is the overwhelmingly number one way to access transit with more than three fourths (78%) of riders report using this mode. Biking (7%), driving alone (6%), vanpool (6%), taxi (5%) and driving/riding with others (5%) are also used to access transit, but to a much lesser extent than walking. Significantly more riders surveyed claim to be using a vanpool (6%) and a taxi (5%) to access transit than in 2010. The increase in riders taking advantage of a vanpool is similar to the finding that riders use public transportation less often than last year because they are carpooling more (see page 12).

Table 14a: How Riders Travel to Public Transit

Transportation Method	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Walk	78%	80%	67%	75%
Bike	7%	7%	3%	3%
Drive Alone	6%	12%	22%	17%
Vanpool	6%	--	--	--
Taxi	5%	--	--	--
Drive/ride with others	5%	4%	7%	6%
Neighborhood circulator	--	2%	1%	-
Other	1%	1%	1%	-
Don't know	-	-	1%	1%

Q12: How do you typically get to the transit stop where you first board public transit? (Multiple responses allowed) *Note: Question originated in 2008. **This question was changed in 2009 to reference "public transit" where previously the question was asked about "the bus."

***Bold** indicates significantly higher percentages at the 95% confidence level

Transit riders who use the bus exclusively or for part of their journey, are significantly more likely than light rail only riders to report that they walk to access public transit (83% and 82% vs. 55%). Light rail only riders are significantly more likely to report using their bicycles (20% vs. 2% and 6%), a vanpool (15% vs. 3% and 5%), a taxi (13% vs. 3% and 4%) and a carpool (10% vs. 2%-6%). Light rail only riders propensity to use modes other than walking to access public transit are consistent with the finding that they are significantly more likely to travel over a mile to reach their transit destination (see page 32).

Table 14b: How Riders Travel to Public Transit by Mode

Transportation Method	Total Riders (n=761)	Bus Only Riders (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Walk	78%	83%	75%	82%	55%
Bike	7%	2%	9%	6%	20%
Drive Alone	6%	8%	6%	5%	7%
Vanpool	6%	3%	8%	5%	15%
Taxi	5%	4%	6%	3%	13%
Drive/ride with others	5%	2%	6%	5%	10%
Neighborhood circulator	-	1%	-	-	1%
Other	1%	2%	1%	1%	3%
Don't know	-	-	-	-	-

***Bold** indicates significantly higher percentages at the 95% confidence level

G. One-way Trip Transfers

Riders who report they are likely to make a transfer on a typical one-way trip continues its significant upward trend reaching the highest levels measured over the past four years (60% in 2009; 72% in 2010; 77% in 2011). Conversely, riders who do not make any transfers on a typical one-way trip have also reached a four year low (40% in 2009; 28% in 2010; 23% in 2011).

In addition, those most likely to make a transfer are:

- Non-Caucasian riders (83% vs. 73% of Non-Caucasian riders)
- Those who are not employed (86% vs. 73% for those employed)
- Those without access to a car (86% vs. 64%)
- Those who use a pass (76% vs. 82%)

Table 15a: Number of Transfers on One-way Trip

# of Transfers	2011 (n=761)	2010 (n=732)	2009* (n=717)	2008 (n=653)
None	23%	28%	40%	35%
One	23%	24%	27%	32%
Two	36%	33%	25%	24%
Three	13%	12%	6%	7%
Four or more	5%	3%	2%	1%
Don't know/refused	-	-	-	1%
No transfers	23%	28%	40%	35%
Transfer at least one time	77%	72%	60%	65%

Q13: How many transfers do you make on your typical one-way?

Note: Question originated in 2008. * In 2009, this question changed from "How many transfers *from one bus to another* do you make on your typical one-way trip?"

***Bold** indicates significantly higher percentages at the 95% confidence level

The trend continues: light rail-only riders are less likely to make a transfer than those using the bus for a portion or all of their trip to make a transfer (58% vs. 12% to 24%).

Table 15b: Number of Transfers on One-way Trip by Mode

# of Transfers	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
None	23%	21%	24%	12%	58%
One	23%	29%	19%	20%	17%
Two	36%	38%	36%	44%	13%
Three	13%	10%	15%	17%	9%
Four or more	5%	3%	6%	7%	2%
Don't know	-	-	-	-	1%
No transfers	23%	21%	24%	12%	58%
Transfer at least one time	77%	79%	76%	88%	42%

***Bold** indicates significantly higher percentages at the 95% confidence level

H. Amount of Time Spent on Public Transit Trip

Riders surveyed indicate they are spending approximately the same amount of time on their trips compared to last year with approximately half reporting to spend less than 45 minutes on their average transit trip (53% vs. 56% in 2010). Riders were significantly more likely than in 2010, however, to indicate they were spending between 60 and 90 minutes on public transit per one-way trip.

Table 16a: Amount of Time Riders Spend on One-way Trip

Time	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Less than 15 minutes	6%	5%	6%	8%
15 to 29 minutes	20%	25%	23%	25%
30 to 44 minutes	27%	26%	26%	29%
45 to 59 minutes	11%	14%	19%	15%
60 to 90 minutes	24%	19%	18%	18%
90 or more minutes	9%	10%	7%	6%
Don't know/refused	2%	1%	1%	1%

Q14: How many minutes do you spend using public transit during your typical one-way trip? *Note: Question originated in 2008. **This question was changed in 2009 to reference "public transit" where previously the question was asked about "the bus."

As in years past, light rail only riders report spending the least amount of time on public transit as a little less than half (45%) indicate they spend less than 30 minutes on their average trip (compared to 27% for bus only riders and 20% for bus/light rail riders).

Table 16b: Amount of Time Riders Spend on One-way Trip by Mode

Time	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Less than 15 minutes	6%	9%	5%	3%	9%
15 to 29 minutes	20%	18%	22%	17%	36%
30 to 44 minutes	27%	30%	25%	27%	20%
45 to 59 minutes	11%	11%	12%	12%	10%
60 to 90 minutes	24%	21%	26%	28%	18%
90 or more minutes	9%	8%	10%	12%	3%
Don't know/refused	2%	3%	2%	1%	3%

***Bold** indicates significantly higher percentages at the 95% confidence level

I. How Riders Travel to Destination After Trip

Similar to the last four years, the vast majority of riders indicate they walk to their destination at the completion of their trip (92%). Driving alone is a distant second at 6% while bicycles (2%), circulators (2%), taxis (1%), and vanpools (1%) are also used but to an even lesser extent. Females are significantly more likely than males to walk to their final destination (95% vs. 91%) along with riders who do not have access to a car (95% vs. 87%). Light rail riders are significantly more likely to drive alone to travel to their final destination (13% vs. 3% to 5%).

Table 17a: How Riders Travel to Destination After Trip

Transportation Method	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Walk	92%	94%	92%	95%
Drive Alone	6%	-	1%	1%
Bike	2%	6%	4%	3%
Neighborhood circulator	2%	1%	1%	-
Taxi	1%	--	--	--
Vanpool	1%	--	--	--
Wheel chair/scooter	--	1%	1%	1%
Drive/ride with others	--	1%	2%	1%
Other	2%	2%	1%	1%
Don't know/refused	-	-	-	1%

*Q15: After you get off at your last stop on this typical trip, how do you get to that destination? *Note: Question originated in 2008. **This question was changed in 2009 to "get off at your last stop."*

Table 17b: How Riders Travel to Destination After Trip by Mode

Transportation Method	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Walk	92%	94%	90%	92%	86%
Drive Alone	6%	3%	7%	5%	13%
Bike	2%	2%	3%	3%	1%
Neighborhood circulator	2%	1%	2%	2%	3%
Taxi	1%	--	2%	1%	4%
Vanpool	1%	--	1%	1%	2%
Wheel chair/scooter	1%	2%	--	--	--
Drive/ride with others	--	--	1%	1%	1%
Other	2%	2%	2%	1%	6%
Don't know/refused	-	--	-	1%	--

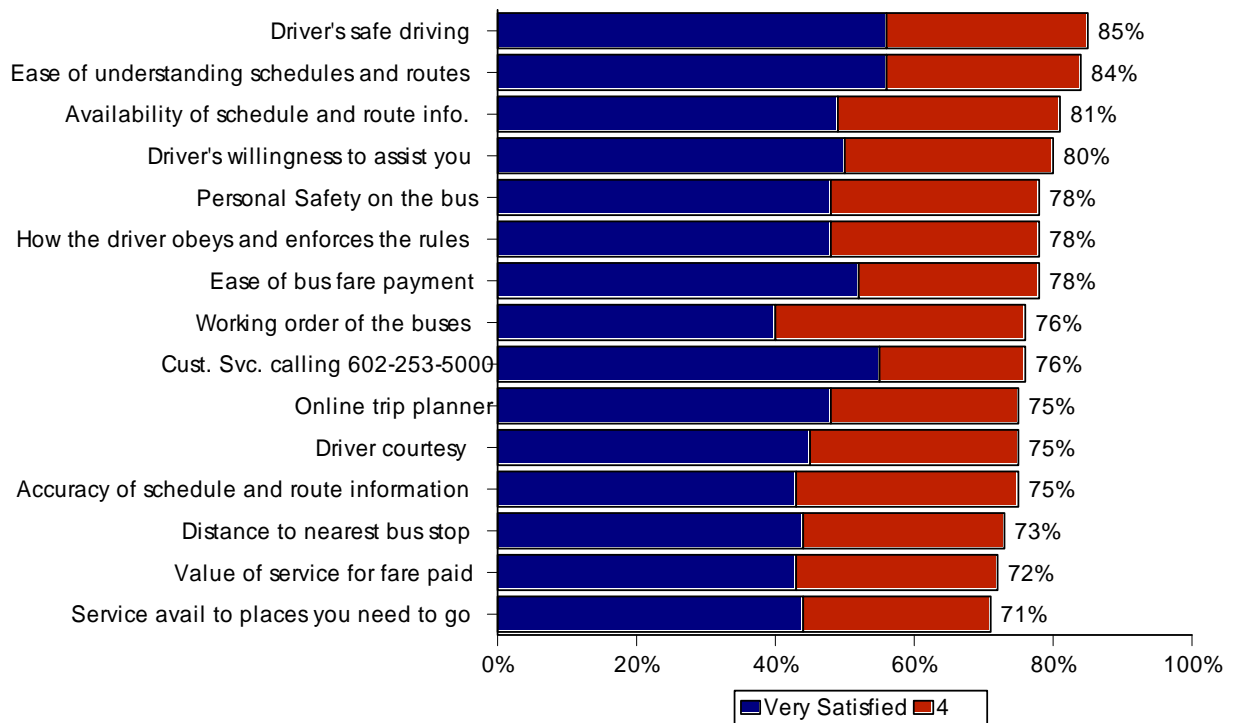
IV. System Satisfaction

A. Satisfaction with Bus Service Elements

Next, bus riders were asked to rate their satisfaction on a variety of bus service elements. **The graphs below and on the next page show that bus riders are most likely to be satisfied with the driver’s safe driving and the ease of understanding the bus schedule, route information and availability of schedule and route information (85%, 84%, and 81% giving a “4” or “5” rating where “5”= “very satisfied”).** These were also the top three rated service elements in the previous year (83, 78% and 82% respectively. **Riders are least likely to indicate high satisfaction with buses running on time (59% vs. 58% last year).**

Overall Satisfaction of Bus Elements “4” + “5” Rating; 5=“Very satisfied”

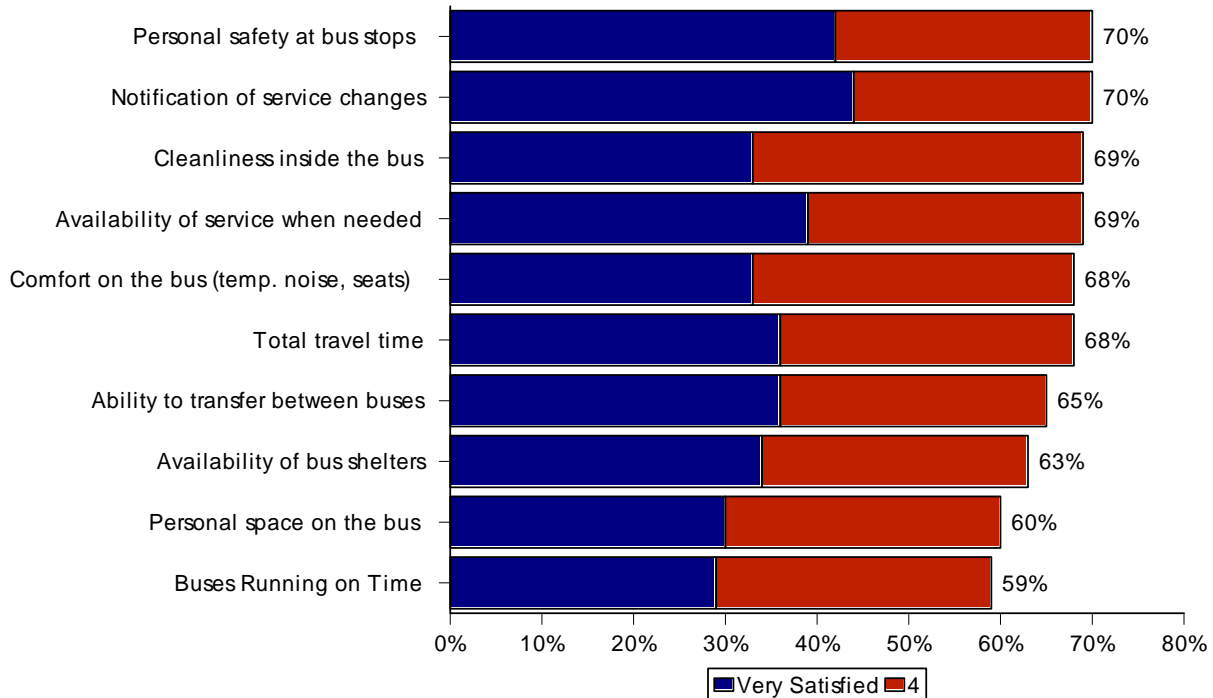
Based on your experience on your typical trip over the past 30 days, please indicate your level of satisfaction with the following elements:



n=620 (Among bus riders with an opinion)

Overall Satisfaction of Bus Elements “4” + “5” Rating; 5=“Very satisfied”

Based on your experience on your typical trip over the past 30 days, please indicate your level of satisfaction with the following elements:



n=620 (Among bus riders with an opinion)

Attributes that increased significantly in top two box ratings this year are: *ease of bus fare payment (78%, up from 72%), accuracy of schedule and route information (75%, up from 70%), value of service for fare paid (69%, up from 63%) and availability of bus shelters (63%, up from 55% last year).* **No attributes experienced significant declines.**

**Table 18a: History of Satisfaction with Bus Service Elements:
Top Two Box Percentages**

(Among Bus Riders with an opinion)

Bus Service Elements	2011 (n=620)**	2010 (n=629)	2009 (n=665)	2008 (n=653)
Driver's safe driving	85%	85%	82%	83%
Ease of understanding schedules and routes	84%	85%	84%	86%
Availability of schedule and route info.	81%	79%	75%	76%
Driver's willingness to assist you	80%	79%	77%	76%
Personal Safety on the bus	78%	81%	75%	76%
How the driver obeys and enforces the rules	78%	78%	74%	74%
Ease of bus fare payment	78%	72%	76%	76%
Working order of the buses	76%	72%	67%	66%
Online trip planner	76%	73%	71%	78%
Cust. Service when calling 602-253-5000	76%	76%	71%	72%
Driver courtesy	75%	77%	78%	77%
Accuracy of schedule and route information	75%	70%	70%	69%
Distance to nearest bus stop	73%	75%	76%	76%
Value of service for fare paid	72%	63%	72%	79%
Service avail to places you need to go	71%	72%	64%	70%
Personal safety at bus stops	70%	68%	61%	66%
Notification of service changes	70%	66%	57%	60%
Cleanliness inside the bus	69%	65%	68%	64%
Availability of service when needed	69%	63%	57%	59%
Comfort on the bus (temp. noise, seats)	68%	64%	56%	58%
Total travel time	68%	67%	64%	64%
Ability to transfer between buses	65%	61%	57%	65%
Availability of bus shelters	63%	55%	49%	51%
Personal space on the bus	60%	62%	57%	52%
Buses Running on Time	59%	58%	56%	52%

Q16: Based on your experience on your typical trip riding the city bus over the past 30 days, please indicate your level of satisfaction with the following BUS service elements? Please use a scale from 1 to 5 where 1 means "very dissatisfied" and a 5 means "very satisfied". ***Bold** indicates significantly higher percentages at the 95% confidence level

** Sample size ranges from 408-620 for total

Interestingly, bus-only riders gave higher ratings for all of the elements evaluated and significantly higher ratings for the majority (13) of the elements rated than light rail riders. This indicates that bus only riders have a higher overall satisfaction with the bus service provided than those who all light rail riders.

**Table 18b: Satisfaction with Bus Service Elements:
Top Two Box Percentages**
(Among Bus Riders with an opinion)

Bus Service Elements	Total 2010 (n=620)**	Bus Only Riders (n=266)	Light Rail Riders (n=356)
Driver's safe driving	85%	88%	83%
Ease of understanding schedules and routes	84%	85%	83%
Availability of schedule and route info.	81%	84%	78%
Driver's willingness to assist you	80%	81%	79%
Personal Safety on the bus	78%	81%	75%
How the driver obeys and enforces the rules	78%	79%	76%
Ease of bus fare payment	78%	79%	76%
Working order of the buses	76%	78%	74%
Cust. Service when calling 602-253-5000	76%	79%	74%
Online trip planner	75%	77%	74%
Driver courtesy	75%	79%	72%
Accuracy of schedule and route information	75%	80%	72%
Distance to nearest bus stop	73%	76%	72%
Value of service for fare paid	72%	75%	70%
Service avail to places you need to go	71%	78%	66%
Personal safety at bus stops	70%	74%	67%
Notification of service changes	70%	75%	66%
Cleanliness inside the bus	69%	70%	68%
Availability of service when needed	69%	77%	63%
Comfort on the bus (temp. noise, seats)	68%	72%	64%
Total travel time	68%	73%	65%
Ability to transfer between buses	65%	70%	61%
Availability of bus shelters	63%	67%	60%
Personal space on the bus	60%	67%	56%
Buses Running on Time	59%	67%	54%

***Bold** indicates significantly higher percentages at the 95% confidence level

** Sample size ranges from 408-620 for total, 168-266 for bus only riders and 240-356 for all light rail riders

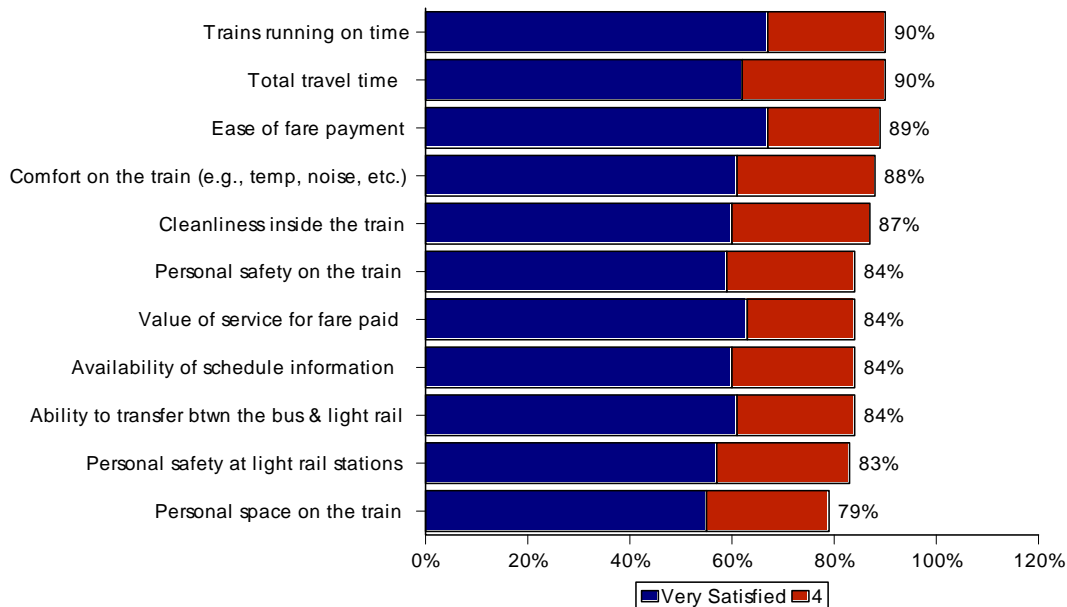
B. Satisfaction with Light Rail Service Elements

Riders indicating they use the light rail were asked to rate their satisfaction level on a series of light rail service elements. **The vast majority of light rail riders are most likely to be satisfied with the trains running on time and total travel time (90% give both a “4” or “5” rating where “5”=“very satisfied”).** *Ease of fare payment, comfort on the train, and cleanliness inside the train* round out the top five elements with the highest satisfaction (87%-89% giving a “4” or “5” rating). **No attributes experienced a significant increase this year.**

Light rail users in general are least likely to indicate high satisfaction with *personal space on the train* (79%). *Personal space on the train* was the only attribute out of the 11 rated that had a significant change (79%, down from 84%). Although this element receives the lowest ratings, satisfaction levels are still high

**Overall Satisfaction of Light Rail Elements
“4” + “5” Rating; 5=“Very satisfied”**

Based on your experience on your typical trip over the past 30 days, please indicate your level of satisfaction with the following elements:



n=489 (Among light rail riders with an opinion)



**Table 19: History of Satisfaction with Light Rail Elements:
Top Two Box Percentages**

(Among Light Rail Riders with an opinion)

Light Rail Service Elements	2011 (n=489) ^{***}	2010 (n=479)	2009 (n=358)
Trains running on time	90%	92%	88%
Total travel time	90%	87%	86%
Ease of fare payment	89%	85%	84%
Comfort on the train (e.g., temperature, noise, seats)	88%	87%	89%
Cleanliness inside the train	87%	91%	94%
Personal safety on the train	84%	87%	88%
Value of service for fare paid	84%	86%	88%
Availability of schedule information	84%	83%	75%
Ability to transfer between the bus and light rail**	84%	85%	79%
Personal safety at light rail stations	82%	85%	82%
Personal space on the train	79%	84%	84%

*Q17: Based on your experience on your typical trip using light rail over the past 30 days, please indicate your level of satisfaction with the following LIGHT RAIL service elements? Please use a scale from 1 to 5 where 1 means “very dissatisfied” and a 5 means “very satisfied”. *Question added in 2009*

***Among those riding the bus and light rail*

***Bold** indicates significantly higher percentages at the 95% confidence level

******* Note: Sample size ranges from 304-489 for total

Overall, there were no significant differences in satisfaction ratings given by transit users that ride the light rail exclusively and those combination riders except for personal space on the train (81% for combination riders vs. 71% for light rail only). Interestingly, combination riders provided higher ratings on all of the elements rated than their light rail only counterparts.

**Table 19b: Satisfaction with Light Rail Elements:
Top Two Box Percentages**
(Among Light Rail Riders with an opinion)

Light Rail Service Elements	2011 Total (n=489)**	Bus/Light Rail Riders (n=362)	Light Rail Only Riders (n=127)
Trains running on time	90%	91%	86%
Total travel time	90%	90%	89%
Ease of fare payment	89%	91%	85%
Comfort on the train (e.g., temperature, noise, seats)	88%	89%	86%
Cleanliness inside the train	87%	88%	84%
Personal safety on the train	84%	84%	79%
Value of service for fare paid	84%	85%	82%
Availability of schedule information	84%	85%	80%
Ability to transfer between the bus and light rail*	84%	84%	80%
Personal safety at light rail stations	83%	84%	81%
Personal space on the train	79%	81%	71%

*Among those riding the bus and light rail

** Sample size ranges from 304-489 for total, 299-362 for bus/light rail riders, and 5- 127 for light rail only riders

C. Overall Satisfaction with Transit Service in the Valley

Overall satisfaction with the transit service in the Valley inched up slightly, but not significantly this year (from 75% to 78%). This increase is mainly attributable to the percentage of those providing satisfaction ratings of “4” which increased significantly from last year (42%, up from 37%). Female riders (40% vs. 32% for males), and those who ride the bus 5 or more days in an average week (37% vs. 30%) are more likely to provide “very satisfied” ratings.

Light rail only riders are the most satisfied group of riders as their very satisfied ratings are significantly higher bus only and combination riders (47% vs. 33% and 34%).

Middle aged riders provide lower satisfaction ratings than their older and younger counterparts (3.9 average vs. 4.1 average for under 35 and 4.2 average for over 55).

When comparing previous years’ data, it should be noted that prior to 2008 the scale was a fixed four-point scale whereas afterwards the scale was a five-point anchored scale, so the top-two box comparison shown below may not be directly comparable.

**Overall Satisfaction with Valley Transit Service:
Very Satisfied+Satisfied Rating**
How would you rate your overall satisfaction with the transit service in the Valley?

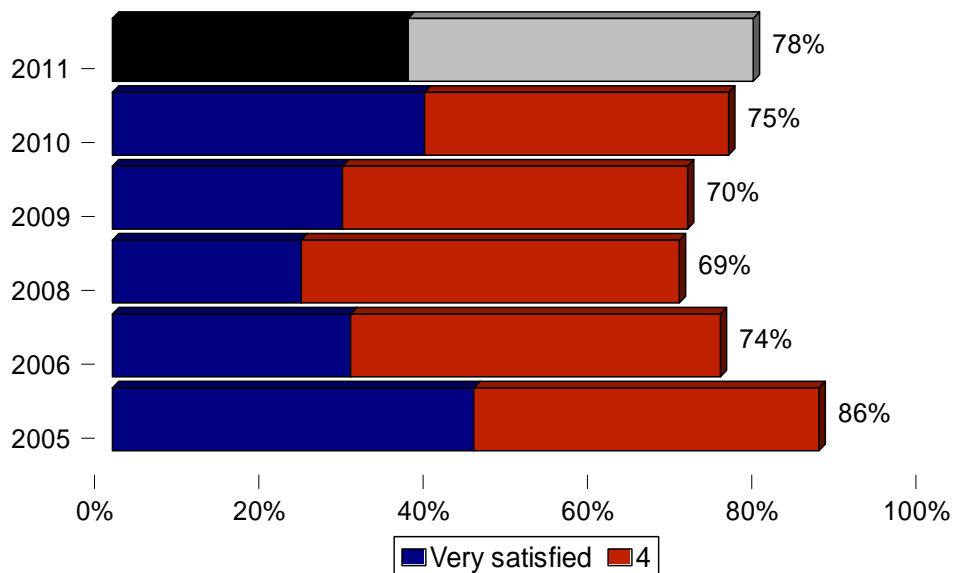


Table 20a: Overall Satisfaction with Transit Service
(Among those with an opinion)

	2011 (n=760)	2010 (n=727)	2009 (n=715)	2008 (n=653)
Top two (4+5 ratings)	78%	75%	70%	69%
5 -Very Satisfied	36%	38%	28%	23%
4	42%	37%	42%	46%
3	17%	19%	23%	22%
2	3%	4%	4%	6%
1-Very Dissatisfied	2%	2%	3%	3%
Average	4.1	4.0	3.9	3.8

Q18: Using the same 1 to 5 scales, how would you rate your overall satisfaction with the transit service in the Valley?

*Note: This question was changed in 2009 to reference “transit service” where previously the question was asked about “bus service.”

***Bold** indicates significantly higher percentages at the 95% confidence level

Table 20b: Overall Satisfaction with Transit Service by Mode
(Among those with an opinion)

	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Top two (4+5 ratings)	78%	78%	78%	76%	84%
5 -Very Satisfied	36%	34%	37%	33%	47%
4	42%	44%	41%	43%	37%
3	17%	17%	16%	17%	15%
2	3%	3%	3%	4%	1%
1-Very Dissatisfied	2%	2%	3%	3%	1%
Average	4.1	4.0	4.1	4.0	4.3

***Bold** indicates significantly higher percentages at the 95% confidence level

Next, riders were asked to identify the primary reason for their satisfaction rating of the transit system. Riders reporting high satisfaction with the system (giving a “4” or “5” rating) cite overall satisfaction in general (14%). In addition, 11% indicate the service is frequent/available/reliable. The next most frequently mention reasons are good

routes/convenient routes and positive light rail mentions in general (both at 8%). Mentions for good routes/convenient routes decreased significantly from last year (8%, down from 15%). These ratings may be attributable to those who ride the bus (7%) or light rail (4%) exclusively who provided significantly lower ratings on this measure than all light rail users (8%) and bus/light rail users (10%).

Table 20c: Primary Reason for Satisfaction with Transit Service
(Among those rating a “4” or “5”)

Reason	2011 (n=591)	2010 (n=544)	2009 (n=500)
Satisfied/Good service	14%	16%	16%
Frequent/available/reliable	11%	13%	16%
Good routes/convenient routes	8%	15%	8%
Positive light rail mention (general)	8%	3%	3%
Friendly/helpful/careful drivers	6%	5%	6%
Saves money/cheap	4%	1%	2%
It's convenient	3%	5%	3%
Easy to use	3%	2%	3%
Don't have to drive/deal with traffic	2%	1%	4%
Always room for improvement	2%	3%	1%
It's safe	2%	1%	1%
Only way to get around	1%	-	-
Fast/quick	1%	-	-
Good place to make friends	1%	1%	-
Expand light rail	1%	-	-
It's comfortable	1%	1%	2%
Other (<1% of consensus)	2%	-	-
<u>Negative Mentions</u>			
Increase frequency//need later/earlier hours	6%	7%	4%
Need better routes/more routes	4%	3%	3%
Buses not on time	2%	3%	3%
Too crowded/need bigger buses	2%	1%	1%
Rates are too high/increasing rates/expensive	2%	2%	1%
Rude/unprofessional drivers	1%	2%	2%
Improve safety	1%	1%	-
Buses are dirty	1%	1%	-
Light rail mentions (negative)	1%	1%	-
Don't like type of people on bus	1%	1%	-
Bus stops need shade	1%	1%	-
Other (<1% of consensus)	1%	6%	11%
Don't know/Refused	2%	4%	4%

Q18a: Please explain the ONE primary reason for your satisfaction with the transit service in the Valley?

***Bold** indicates significantly higher percentages at the 95% confidence level

Table 20d: Primary Reason for Satisfaction with Transit Service by Mode
(Among those rating a “4” or “5”)

Reason	Total Riders (n=602)	Bus Riders Only (n=208)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=278)	Light Rail Only Riders (n=106)
Satisfied/Good service	14%	17%	13%	13%	13%
Frequent/available/reliable	11%	17%	7%	8%	7%
Good routes/convenient routes	8%	7%	8%	10%	4%
Positive light rail mention (general)	8%	6%	8%	8%	4%
Friendly/helpful/careful drivers	6%	11%	3%	4%	1%
Saves money/cheap	4%	5%	4%	3%	6%
It's convenient	3%	2%	3%	2%	6%
Easy to use	3%	1%	4%	4%	3%
Don't have to drive/deal with traffic	2%				
Always room for improvement	2%	1%	2%	2%	--
It's safe	2%				
Only way to get around	2%	1%	2%	3%	1%
<u>Negative Mentions</u>					
Increase frequency//need later/earlier hours	5%	6%	5%	6%	--
Need better routes/more routes	4%	4%	4%	5%	1%
Buses not on time	2%	3%	2%	2%	1%
Too crowded/need bigger buses	2%	1%	3%	3%	2%
Rates are too high/increasing rates/expensive	2%	1%	2%	2%	1%
Other **	20%	15%	22%	20%	30%
Don't know/Refused	2%	2%	2%	2%	1%

Q18a: Please explain the ONE primary reason for your satisfaction with the transit service in the Valley?

Riders reporting they are not satisfied with the public transit system (giving a 1-3 rating) cite a need to increase the frequency/need earlier later hours (22%) and need better routes (15%) as their primary reasons. The next most frequently mentioned reason rude drivers (5%).

Table 20e: Primary Reason for Dissatisfaction with Transit Service
(Among those rating a “1-3”)

Reason	2011 Total (n=169)	2010 Total (n=183)	2009 Total (n=215)
Increase frequency//need later/earlier hours	22%	26%	22%
Need better routes/more routes	15%	9%	12%
Rude/unprofessional drivers	5%	3%	5%
Too crowded/need bigger buses	4%	1%	3%
Rates are too high/increasing rates	4%	7%	2%
Buses/light rail not on time	3%	7%	5%
Bus stops need shade/shelter	3%	2%	2%
Always room for improvement	3%	4%	-
Buses break down	2%	1%	4%
Don't like the type of people on the bus/transients/school kids	2%	2%	2%
Bus stop is too far away	2%	1%	3%
Negative light rail mentions (dislike it, few routes, waste of money)	2%	1%	1%
Lack of safety/improve safety	2%	1%	-
<u>Positive Mention</u>			
Satisfied/Good service	3%	3%	3%
Good routes	2%	1%	-
Frequent/available/reliable	2%	4%	3%
Friendly/helpful drivers	2%	1%	2%
Saves money/cheap		1%	1%
Other**	17%	7%	7%
Don't know	4%	4%	4%

*Q18a: Please explain the ONE primary reason for your satisfaction with the transit service in the Valley? *Bold indicates significantly higher percentages at the 95% confidence level. ** Other includes mentions of 1% or less.*

Table 20f: Primary Reason for Dissatisfaction with Transit Service by Mode
(Among those rating a “1-3”)

Reason	Total Riders (n=XXX)	Bus Riders Only (n=59)	Light Rail Riders (n=110)	Bus/Light Rail Riders (n=89)	Light Rail Only Riders (n=21)
Increase frequency//need later/earlier hours	22%	24%	21%	21%	19%
Need better routes/more routes	15%	15%	16%	17%	10%
Rude/unprofessional drivers	5%	7%	4%	6%	--
Too crowded/need bigger buses	4%	9%	2%	1%	5%
Rates are too high/increasing rates	4%	3%	4%	4%	--
Buses/light rail not on time	3%	2%	4%	4%	--
Bus stops need shade/shelter	3%	3%	3%	3%	--
Always room for improvement	3%	3%	3%	2%	5%
Buses break down	2%	2%	3%	3%	--
Don't like the type of people on the bus/transients/school kids	2%	2%	2%	2%	--
Bus stop is too far away	2%	2%	2%	1%	5%
Negative light rail mentions (dislike it, few routes, waste of money)	2%	--	3%	2%	5%
Lack of safety/improve safety	2%	2%	2%	1%	5%
Positive Mention					
Satisfied/Good service	3%	--	4%	6%	--
Safe/well lit	2%	--	3%	2%	5%
Good routes	2%	2%	3%	1%	10%
Frequent/available/reliable	2%	5%	1%	1%	--
Friendly/helpful drivers	2%	3%	1%	1%	--
Other**	17%	14%	18%	16%	29%
Don't know	4%	3%	4%	3%	5%

Q18a: Please explain the ONE primary reason for your satisfaction with the transit service in the Valley?

***Bold** indicates significantly higher percentages at the 95% confidence level. **Other includes mentions of 1% or less.

D. Likelihood to Recommend

This year, a significant increase occurred in riders who indicate they are likely to recommend public transit service to other people (83%, up from 78%). This is also a four year high for these ratings. This increase is mainly attributable to an increase in the percentage of riders who claim they are “very likely” to recommend public transit service (60%, up from 54%).

Few differences exist in ratings among demographic and transit category subgroups and none of the differences are significant.

Table 21a: Likelihood to Recommend Transit Service

Rating	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Top two (4+5 ratings)	83%	78%	80%	76%
5 – Very Likely	60%	54%	56%	49%
4	23%	24%	24%	27%
3	11%	13%	14%	15%
2	2%	3%	2%	5%
1-Not at all Likely	3%	3%	3%	4%
Don't know	1%	3%	1%	--

*Q19a: How likely are you to recommend the transit service to other people? *Note: This question was changed in 2009 to reference “transit service” where previously the question was asked about “bus service.”*

Table 21b: Likelihood to Recommend Transit Service by Mode

Rating	Total Riders (n=761)	Bus Riders Only (n=232)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=400)	Light Rail Only Riders (n=100)
Top two (4+5 ratings)	83%	82%	84%	81%	91%*
5 – Very Likely	60%	62%	59%	57%	67%
4	23%	20%	25%	24%	24%
3	11%	12%	10%	12%	5%
2	2%	3%	2%	3%	1%
1-Not at all Likely	3%	2%	3%	3%	2%
Don't know	1%	2%	1%	1%	3%

***Bold** indicates significantly higher percentages at the 95% confidence level

E. Likelihood to Continue Riding Public Transit

Similar to likelihood to recommend, the likelihood to continue riding public transit one year from now also increased significantly from last year (77%, up from 72% for top two box ratings) . Females (69% vs. 54% for males) are more likely to indicate they are “very likely” to be using public transit in a year from now.

No differences exist among bus/light rail riders and light rail only riders in future likelihood to ride. Riders over 55 years of age provide higher ratings for likelihood to recommend than riders under 55 years of age. For example, they provide a higher top box or “5” rating (71% vs. 58% those under 55). Additionally, their average ratings are higher (average of 4.5 vs. 4.3 for those under 55 years of age).

Table 22a: Likelihood to Ride Public Transit One Year from Now

Rating	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Top two (4+5 ratings)	77%	72%*	79%	76%
5 – Very Likely	60%	56%	64%	58%
4	17%	16%	15%	18%
3	10%	12%	9%	10%
2	3%	4%	4%	5%
1-Not at all Likely	5%	7%	7%	8%
Don't know	5%	5%	1%	--

Q19b: How likely are you to be riding public transit one year from now? *Note: This question was changed in 2009 to reference “public transit” where previously the question was asked about “the bus.” ***Bold** indicates significantly higher percentages at the 95% confidence level

Table 22b: Likelihood to Ride Public Transit One Year From Now by Mode

Rating	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Top two (4+5 ratings)	77%	76%	78%	77%	83%
5 – Very Likely	60%	62%	59%	59%	62%
4	17%	14%	19%	18%	21%
3	10%	10%	10%	10%	9%
2	3%	3%	3%	3%	2%
1-Not at all Likely	5%	6%	5%	6%	1%
Don't know	5%	5%	4%	4%	5%

***Bold** indicates significantly higher percentages at the 95% confidence level.

E. Key Drivers for Overall Satisfaction and Loyalty Ratings

Three sets of correlations were run using the 25 individual transit service elements. Those elements were correlated against ratings for overall satisfaction, likelihood to recommend, and likelihood to ride in one year. The correlation coefficients are shown in Table 23.

There are seven elements that are highly correlated with overall satisfaction and five that are highly correlated with likelihood to recommend. These elements represent the key drivers for these measures.

As found last year, for overall satisfaction, 6 of the 7 key drivers are related to operational elements related to availability, travel time, on-time performance and transfers (*availability of service when needed* .501, *ability to transfer between buses* .465, *service available to the places you need to go* .450, *total travel time* .449, *working order of the buses* .449, *availability of bus shelters* .427). The seventh key driver is related to value (*value of service for fare paid* .423). Value surfaced as a key driver in 2010, but its correlation with satisfaction is not as strong as it was last year. *Buses running on time*, which was a key driver last year, dropped down the list and is not a key driver in 2011.

The top three drivers for likelihood to recommend are *availability of the service when needed* (.430), *service available to the places you need to go* -.411, and *total travel time* - .378).

In general, satisfaction with the various elements is less likely to be correlated with the likelihood a rider will still be using the system in a year and there are not any “key drivers.” However, the three attributes with the highest levels of correlation with overall satisfaction are *ease of fare payment* (.211), *driver courtesy* (.208), and *availability of bus service* (.207).

Table 23: Correlations with Satisfaction and Loyalty Ratings
Correlation Coefficients

Bus Elements	Overall Satisfaction	Likelihood to Recommend	Likelihood to Ride in One Year
Availability of service when needed	.501	.430	.123
Ability to transfer between buses	.465	.363	.125
Service available to the places you need to go	.450	.411	.163
Total travel time	.449	.378	.193
Working order of the buses	.449	.358	.173
Availability of bus shelters	.427	.320	.207
Value of service for fare paid	.423	.355	.181
Driver's safe driving	.388	.288	.105
Comfort on the bus	.386	.359	.183
Notification of service changes	.381	.294	.166
Buses running on time	.367	.315	.140
Personal safety on the bus	.367	.311	.164
Driver's willingness to assist you	.363	.303	.197
How the driver obeys and enforces rules	.353	.316	.203
Driver courtesy	.350	.324	.208
Personal safety at bus stops	.348	.267	.104
Distance to nearest bus stop	.343	.340	.132
Ease of fare payment	.330	.320	.211
Customer service when calling 602-253-5000	.323	.316	.088
Online trip planner	.322	.319	.121
Accuracy of schedule and route information	.293	.271	.167
Availability of schedule and route information	.286	.296	.138
Cleanliness inside the bus	.271	.250	.152
Personal space on the bus	.273	.281	.154
Ease of understanding schedules and routes	.237	.206	.095

The chart on the next page shows the relationship between the satisfaction ratings for each element evaluated (percent giving a “4” or “5” satisfaction rating) and the relative impact of that element on overall satisfaction (i.e., its correlation coefficient with the overall satisfaction rating).

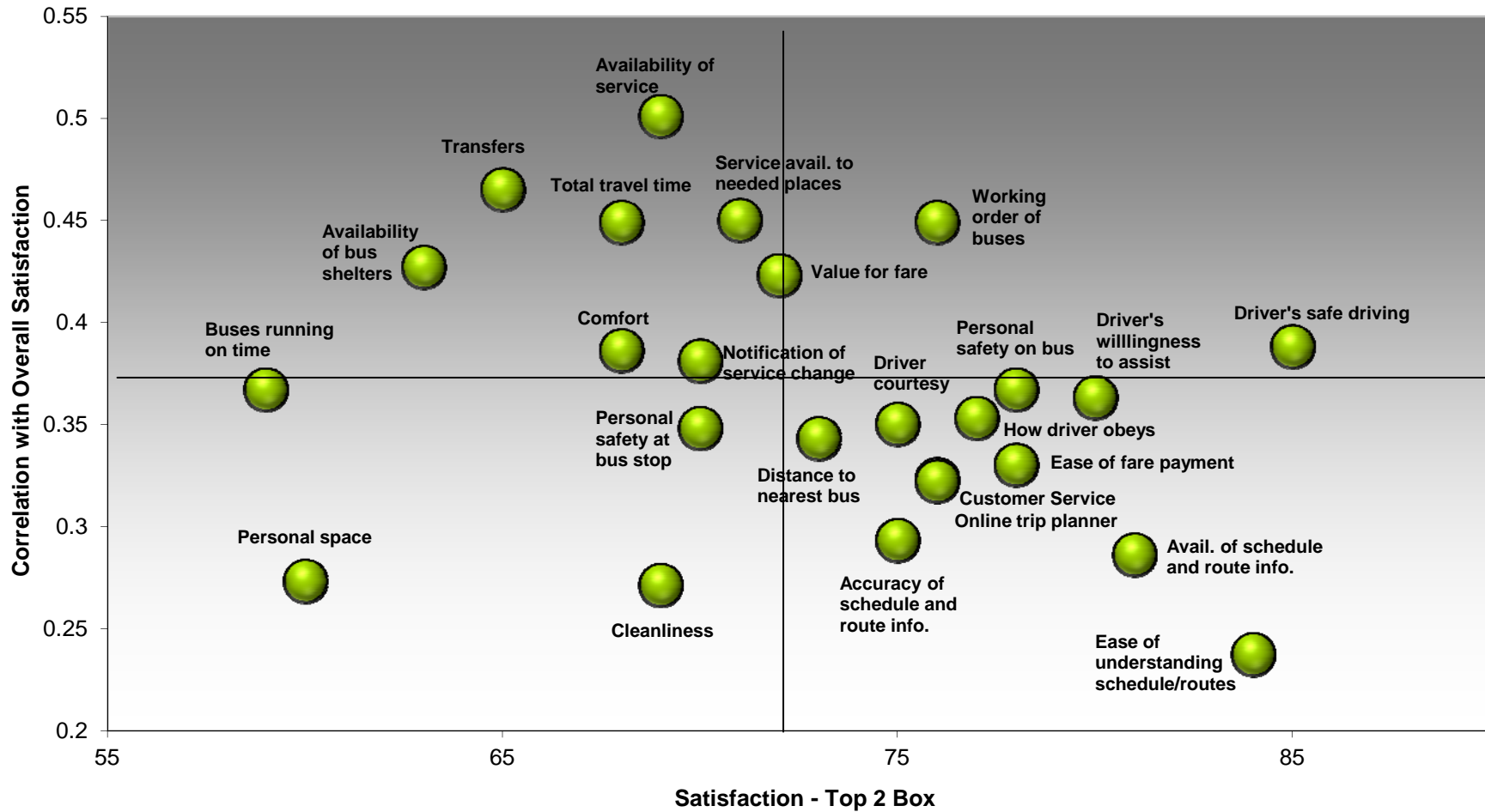
Elements in the upper left-hand quadrant of the chart represent opportunities for Valley Metro to impact overall satisfaction with its service. These are elements with comparatively low levels of satisfaction, but relatively high impact on the overall satisfaction of the rider with Valley Metro service. **The key attributes are related to the availability, reliability, “reach” of service and value – *service available to needed places, total travel time, availability of service when needed, transfers, and buses running on time, notification of service change , comfort, and value for the fare paid.***

All of the above attributes also were drivers in 2010 EXCEPT for *comfort*. This is new to the list for 2011.

Improvements in these seven areas will have the greatest overall impact on rider satisfaction.

Priority Chart

Relative Importance by Satisfaction



V. Loyalty Segments

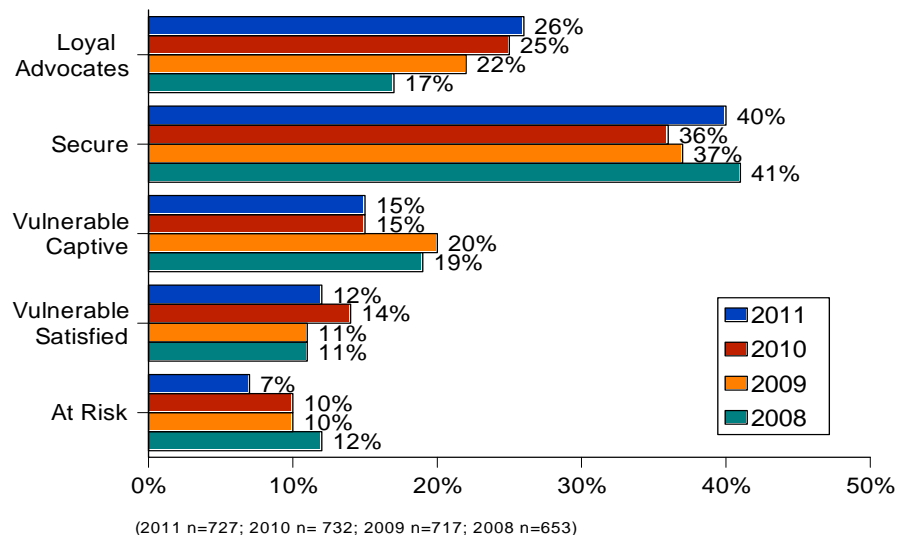
A. Definitions

Five different loyalty segments were identified using rider answers to three questions: *Overall satisfaction with the bus system in the Valley, likelihood to recommend the bus service, and likelihood to be riding the bus one year from now.*

- **Loyal Advocates:** Riders who are completely satisfied (give a “5” or “very satisfied” rating), are very likely to recommend the transit service to others (give a “5” or “very likely” rating), and are very likely to continue using the bus one year from now (give a “5” or “very likely” rating).
- **Secure Riders:** Riders who are both satisfied and likely to continue riding (give a “4” or “5” rating on both measures).
- **Vulnerable Captive Riders:** Riders who are unsatisfied (give a “1 to 3” rating for overall satisfaction), but who are likely to be riding the bus in a year (give a “4” or “5” rating).
- **Vulnerable Satisfied Riders:** Riders who are satisfied (give a “4” or “5” rating for overall satisfaction), but who are not likely to be riding the bus in a year (give a “1 to 3” rating).
- **At Risk Riders:** Riders who are unsatisfied (give a “1 to 3” rating for overall satisfaction) and also are likely to stop using the service in the next year (“1 to 3” rating).

The graph below illustrates that the distribution by segment has shifted favorably. **The number of Loyal Advocates reached a four year high (26%, up from 17% in 2008, 22% in 2009 and 25% in 2010) and although not significant, the percentage of Secure Riders increased from last year (40%, up from 36%). There was a significant decrease in At Risk riders (7%, down from 10%).** The increase in Loyal Advocates and Secure Riders coupled with the decrease in At Risk Riders is a very positive sign for rider support for the transit system.

Loyalty Segments



B. Profiles of Loyalty Segments

1. *Loyal Advocates*

Loyal Advocates give the highest rating (“5”) on all three measures – overall satisfaction, likelihood to recommend and likelihood to be using public transit in one year. These riders also provided the highest percentage of 4 and 5 ratings of all of the segments for their satisfaction with both the bus and light rail elements.

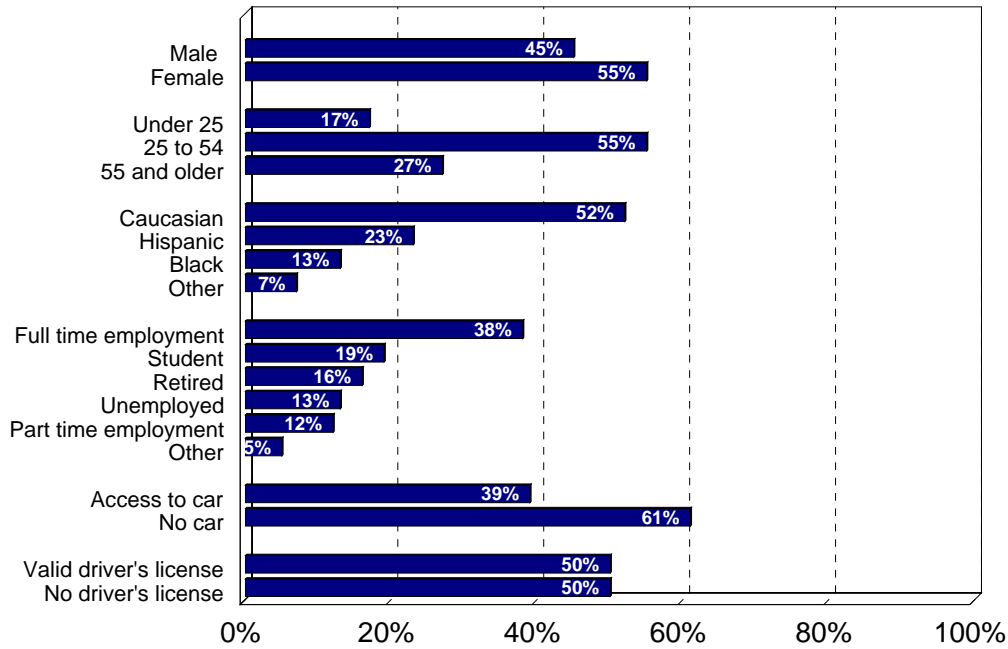
This group of riders is more likely to be female than male, Caucasian vs. Non-Caucasian, and are more likely than other groups to be age 55 or older. They are the least likely group to be using transit to get to work and more likely than riders in some of the other groups to use transit for personal business, recreational trips, or medical appointments. They are equally as likely as unlikely to have a driver’s license but less likely to have access to a vehicle. They ride the bus six to seven days in an average week and claim to be riding public transit more often than a year ago.

In comparison to other loyalty segments, Loyal Advocates are more likely to include riders with the following attributes:

- Females (55% vs. 33% to 49% for other segments)
- Older riders (12% aged 55 to 64 vs. 5% of Vulnerable Satisfied and 4% of Vulnerable Captives) and have highest mean age of all rider segments (43.2 years of age versus 41.5 to 42.7 years of age)
- Have income levels in both the lower (41% earn less than \$20K vs. 25% to 37% for all segments but At Risk) and upper ranges (35% earn \$50,000+ annually versus 22% to 26% for all segments but Vulnerable Satisfied Defectors)
- Riders who are retired (16% vs. 4% to 8%)
- Access to two cars (35% vs. 23% to 32%)
- Ride the bus 6 or 7 days (38% vs. 25% - 37%)
- Are riding more often than one year ago (51% vs. 45% for Vulnerable Satisfied Defectors, 35% for Vulnerable Captive and 32% for At Risk)
- Use a reduced fare (37% vs. 20% - 27% for all other segments)
- Tend to use public transit to go to medical and dental appointments more often than riders in other segments (27% vs. 12% - 19% for other segments)
- Significantly less likely to use the Internet or Valley metro web site for transit information (32% vs. 40% to 52%) and more likely to consult friends and family (10% vs. 4% to 6%).

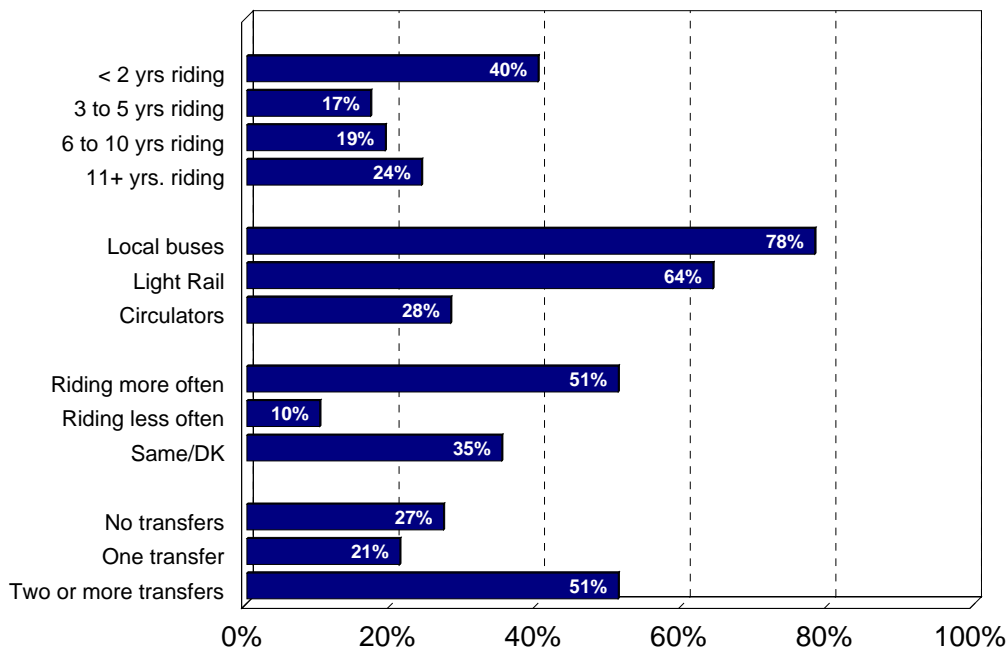
Loyal Advocates

Demographic Attributes



Loyal Advocates

Transit Usage Characteristics



2. *Secure Riders*

Secure riders are those who are both satisfied and likely to be using transit in one year (give a “4” or “5” rating on both measures), but to a slightly lesser extent than loyal advocates. These riders, however, are more likely to provide a “4” instead of a “5” rating for overall satisfaction (86% vs. 13%). They are also extremely likely to recommend transit service to others, as 94% provide “4 or 5” ratings for this measure. Although strong, their satisfaction ratings for bus and light rail elements are lower than those for Loyal Advocates and similar to those of Vulnerable Satisfied riders.

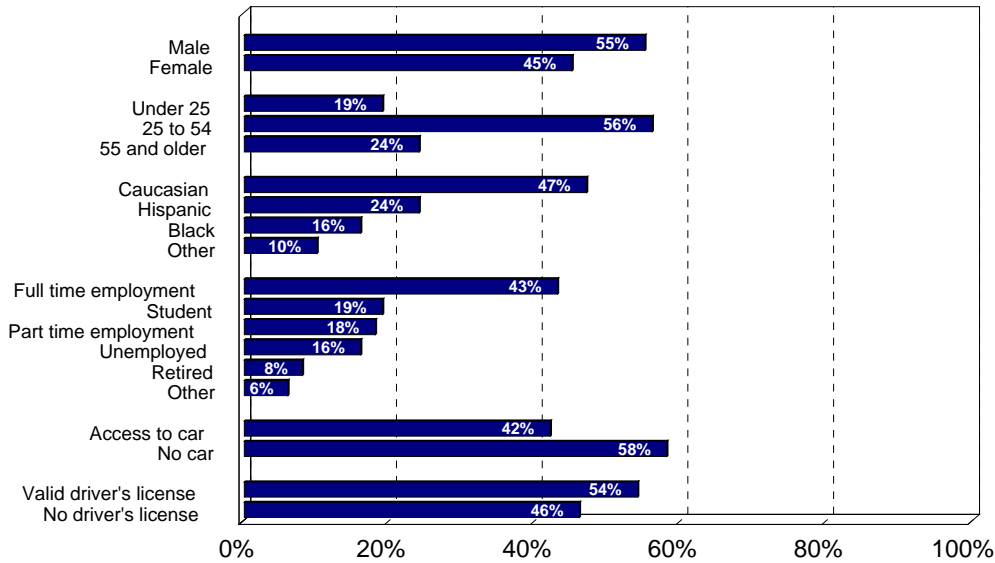
This group of riders appears to be comprised of more men. They are more likely than Loyal Advocates and Vulnerable Satisfied riders to use transit to get to work. They take advantage of all transit choices (buses, light rail, and circulators), and claim to be using public transit more often than a year ago.

In comparison to other loyalty segments, Secure Riders are more likely to include riders with the following attributes:

- Have higher income levels (35% earn \$50,000+ vs. 22% to 26% for all segments but Vulnerable Satisfied riders and 13% earn \$75+ vs. 6% to 10% for all segments but Vulnerable Satisfied)
- Have one licensed driver in their household (22% vs. 13% to 19%)
- Ride public transit more often than a year ago (50% vs. 45% for Vulnerable Satisfied, 35% for Vulnerable Captive and 33% for At Risk)
- Tend to ride around Tempe significantly more than other segments (41% vs. 29% to 33% for other segments).
- Tend to purchase their pass at a vending machine (11% vs. 3% to 6% for all segments except Vulnerable Satisfied Defectors)
- Most likely of all the segments to use a phone, handheld device or the Internet to get transit information (76% vs. 62% to 72%)

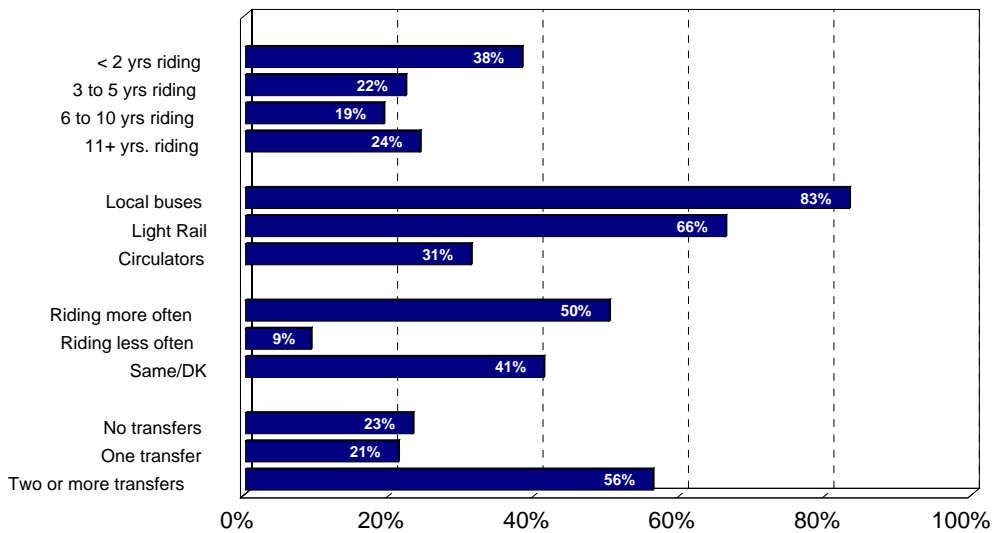
SecureRiders

Demographic Attributes



Secure Riders

Transit Usage Characteristics



3. *Vulnerable Captives*

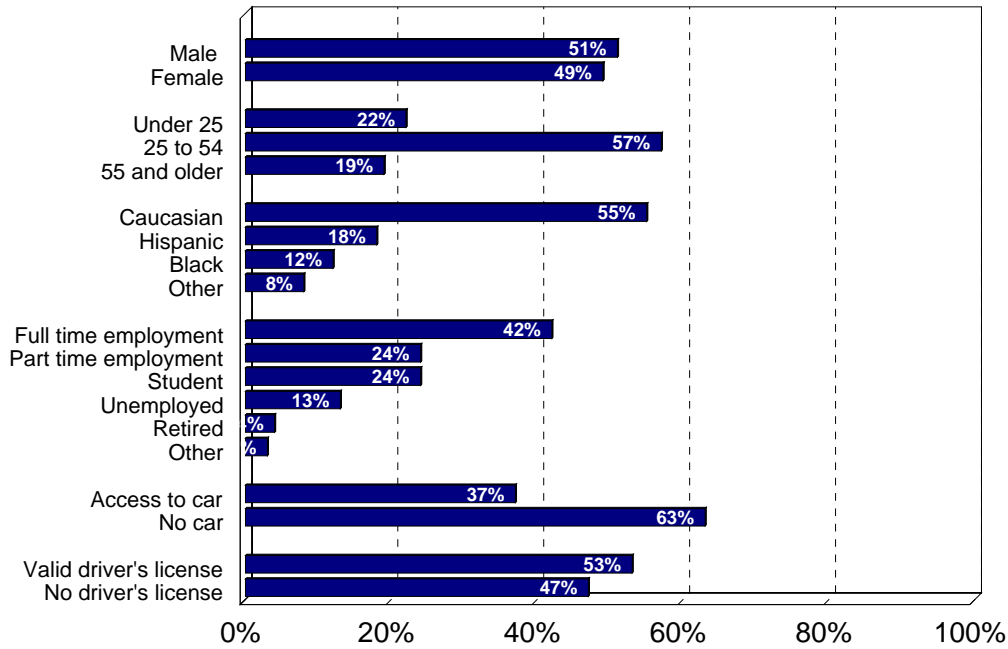
Riders classified as “Vulnerable Captives” are those who are not satisfied with the system overall (provide a “1” to “3” rating) but indicate they are likely to be using transit in one year (provide a “4” or “5” rating). **This group of riders is the only group that is equally likely to be male or female. They tend to be slightly younger Caucasians who live alone, do not have ready access to a car, have lower incomes and have been using public transit for many years and report that their transit usage has stayed the same over the past year. They also are more likely than users in most other segments to report transit usage to a wider variety of locations.**

In comparison to other loyalty segments, Vulnerable Captives are more likely to include riders with the following attributes:

- More likely to be younger (lowest average of 41.5 years old for age versus 41.9 years to 43.2 years)
- Have one person in the household (28% vs. 19% to 25% of other segments)
- Have no cars in the household (14% vs. 2% to 7% for all other segments except At Risk)
- Have second to lowest average income (\$32.4 vs. \$37.1 to \$42.7 for all segments but At Risk)
- Have second highest average for number years riding public transit (7.6 vs. 4.3 years to 7.2 years for all segments but At Risk)
- Report Sunday transit usage (58% vs. 44% to 53%)
- Most likely to report no change in transit usage (49% vs. 33% to 44%)
- Make one transfer on an average trip (30% vs. 20% to 21%).

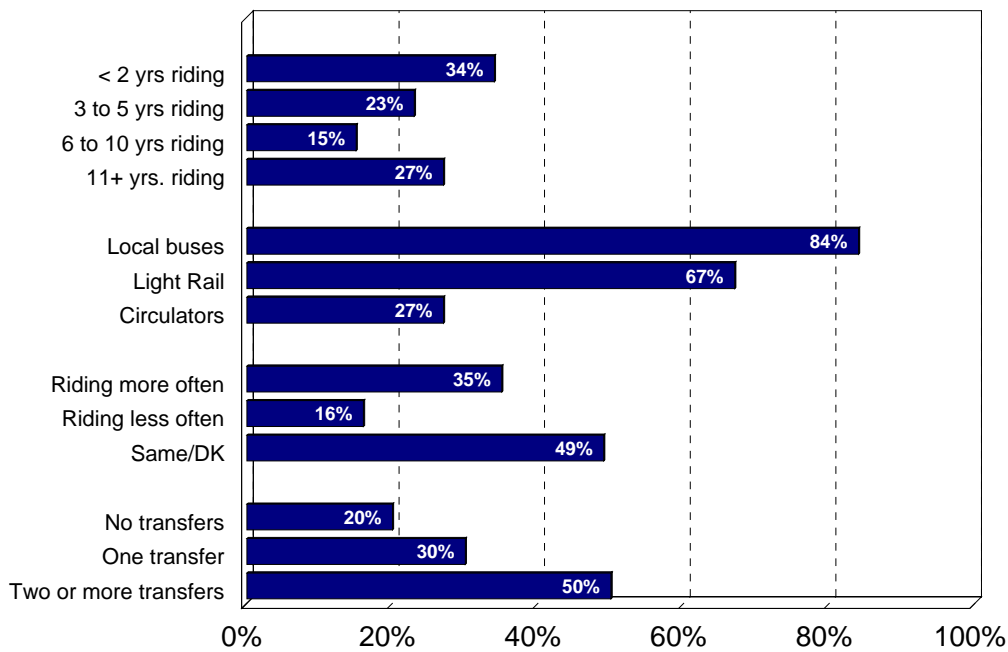
Vulnerable Captives

Demographic Attributes



Vulnerable Captives

Transit Usage Characteristics



4. *Vulnerable Satisfied Riders*

Vulnerable Satisfied riders are those who are satisfied with the bus system overall (provide a “4” or “5” rating), but are unlikely to be riding the bus in one year (provide a “1”, “2”, or “3” rating).

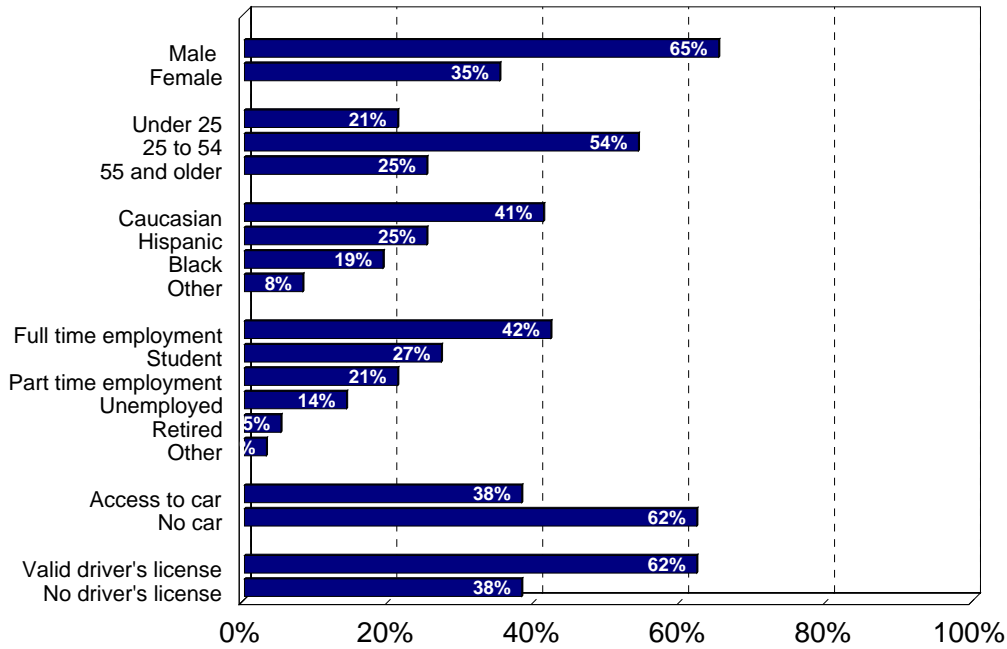
This group of riders is male with higher annual household incomes attributable to two wage earners. They, as well as their family members, have drivers’ licenses and access to vehicles and have used public transportation for under two years. They have high incidences of cell phone ownership and Internet access and have a propensity to use technology to access transit information. Although transit appears to be meeting their needs currently, it is likely they see this as a temporary situation that will change.

In comparison to other loyalty segments, Vulnerable Satisfied Riders are more likely to include riders with the following attributes:

- Have highest average annual income (\$42.7 vs. \$30.2 to \$37.3).
- Have a valid driver’s license (62% vs. 50% to 56% for other segments)
- Have three or more licensed drivers per household (18% vs. 10% to 14%)
- Have one child living in the household (34% vs. 8% to 28%)
- Have two or more employed in the household (40% vs. 28% to 32%)
- Have highest average number of cars (1.9 vs. 1.4 to 1.8)
- Comprised of Males (65% vs. 45% to 55% for all segments except At Risk)
- Two years or less of public transit usage (51% vs. 29% to 40% of all other segments)
- Have access to the Internet (87% vs. 77% to 79%)
- Own cell phone (95% vs. 75% to 80%)
- Use cell phone to get transit information (18% vs. 8% to 12% for all segments except Vulnerable Captives)

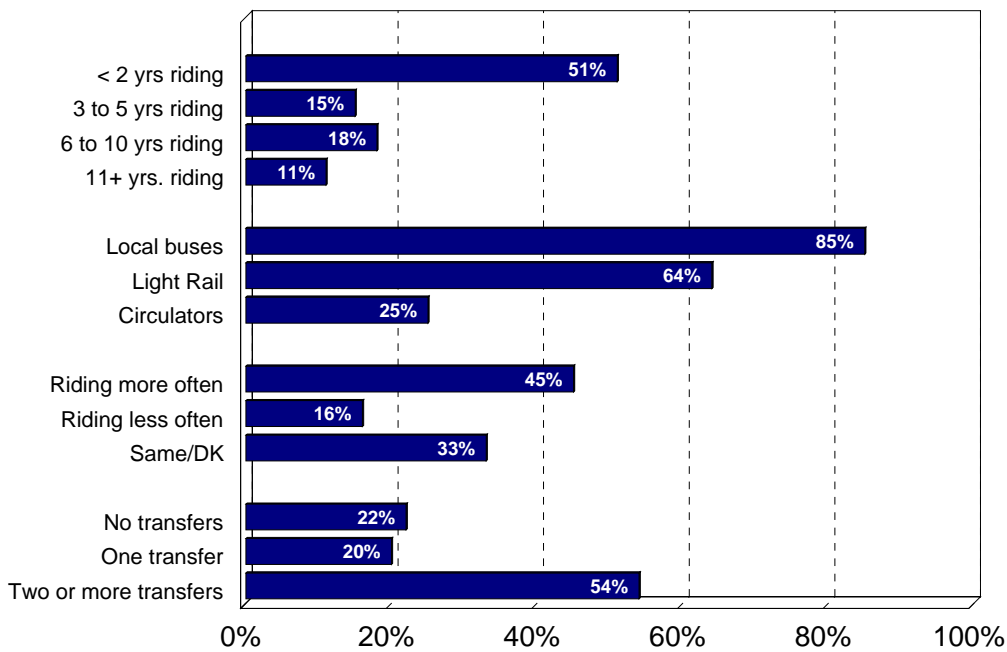
Vulnerable Satisfied

Demographic Attributes



Vulnerable Satisfied

Transit Usage Characteristics



5. *At Risk*

Finally, At Risk riders are those who are neither satisfied with the bus service in the Valley (give “1” to “3” satisfaction ratings) nor likely to be riding the bus one year from now (“1” to “3” likelihood ratings). In addition, they provide the lowest percentage of “4” and “5” rating for likelihood to recommend (31%) and have the lowest percent of “4” and “5” ratings of all of the segments for their satisfaction with both the bus and light rail elements.

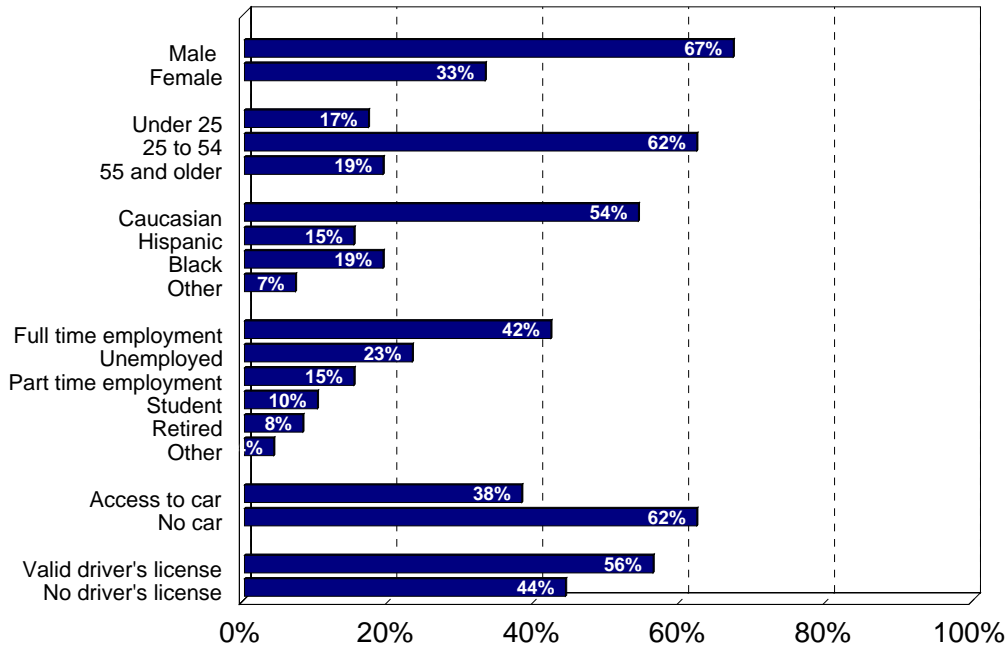
These riders skew toward males who have higher unemployment rates, earn less annually and have less access to a vehicle. Since they do not have access to a vehicle they use public transportation to get to work. They ride local buses and circulators and many claim to be using public transit less often than one year ago. They are less accustomed to using technology to access transit information and prefer the more traditional sources.

In comparison to other loyalty segments, At Risk Riders are more likely to include riders with the following attributes:

- Males (67% vs. 45% to 55% for all segments but Vulnerable Satisfied)
- Highest unemployment rate (23% vs. 13% to 16% of all other segments)
- Have lowest average annual income (\$30.2 vs. \$32.4 to \$37.3)
- Do not have access to a car in the house (10% vs. 2% to 7% except for Vulnerable Captives)
- Take advantage of buses (94% vs. 78% to 86%) and Circulators (40% vs. 25% to 31%)
- Use public transportation to conduct personal business (31% vs. 18% to 28% for all others)
- Claim to be using public transit less often than one year ago (23% vs. 9% to 17% of all other segments)
- If use pass, use an all day/3 day or 7 day pass (59% vs. 35% to 44%)
- Use Transit Book to access information (60% vs. 45% to 50% of all other segments)
- Are least likely to use a cell phone or handheld device to access transit information (62% vs. 65% to 76%)

At Risk

Demographic Attributes



At Risk

Transit Usage Characteristics

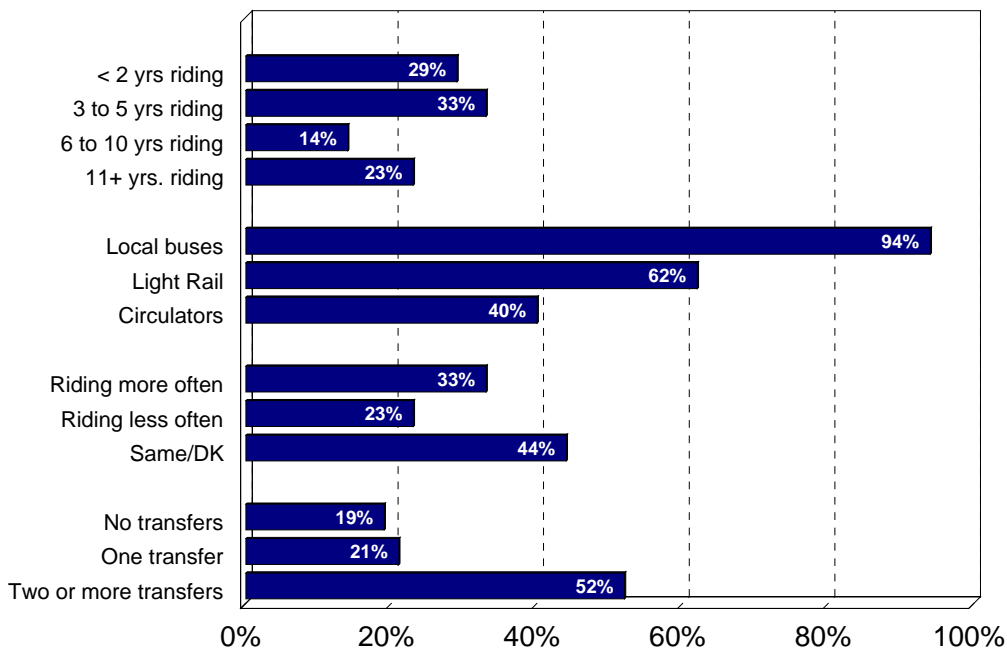


Table 24a: Loyalty Segments – Demographic Attributes

Demographics	2011 Total (n=761)	Loyal Advocates (n=190)	Secure (n=291)	Vulnerable Captive (n=109)	Vulnerable Satisfied (n=85)	At Risk (n=52)
Gender						
Male	54%	45%	55%	51%	65%	67%
Female	46%	55%	45%	49%	35%	33%
Age						
Under 25	19%	17%	19%	22%	21%	17%
25 to 54	56%	55%	56%	56%	54%	62%
55 and older	23%	26%	24%	19%	25%	19%
Refused	2%	2%	1%	3%	--	2%
Average	42.4 yrs	43.2 yrs	42.5 yrs	41.5 yrs	41.9 yrs	42.7 yrs
Ethnic Origin						
White	48%	52%	47%	55%	41%	54%
Hispanic	23%	23%	24%	18%	25%	15%
Black	15%	13%	16%	12%	19%	19%
Other	8%	6%	9%	9%	8%	8%
Refused/na	6%	6%	4%	6%	7%	4%
Income						
< \$20,000	37%	41%	33%	37%	25%	44%
\$20,001 to \$30,000	18%	11%	20%	25%	17%	17%
\$30,001 to \$60,000	27%	26%	27%	25%	33%	31%
\$60,000+	18%	22%	20%	13%	25%	8%
Avg. in ,000	\$36.6	37.1	37.3	32.4	42.7	30.2
Employment						
Full-time	42%	38%	43%	42%	42%	42%
Student	20%	19%	19%	24%	27%	10%
Part time	18%	12%	18%	24%	21%	15%
Unemployed	15%	13%	16%	13%	14%	23%
Retired	9%	16%	8%	4%	5%	8%
Disabled	3%	2%	4%	2%	2%	--
House spouse	1%	2%	1%	2%	1%	--

***Bold** indicates significantly higher percentages at the 95% confidence level

Table 24b: Loyalty Segment – Demographic Attributes (Continued)

Demographics	2011 Total (n=761)	Loyal Advocates (n=190)	Secure (n=291)	Vulnerable Captive (n=109)	Vulnerable Satisfied (n=85)	At Risk (n=52)
Access to Car	40%	39%	42%	37%	38%	38%
Valid driver's license	54%	50%	54%	53%	62%	56%
People in HH						
One	20%	19%	18%	28%	19%	25%
Two	26%	26%	25%	25%	27%	23%
Three	18%	18%	20%	16%	19%	15%
Four or more	32%	32%	32%	27%	34%	35%
DK/Refused	4%	5%	5%	4%	1%	2%
Children <18 in HH (among those with more than 1 person in HH)						
Zero	19%	17%	21%	27%	12%	25%
One	24%	22%	24%	28%	34%	8%
Two	16%	18%	14%	12%	19%	23%
Three or more	9%	7%	8%	8%	9%	8%
DK/Refused	32%	36%	33%	25%	26%	36%
Cars in HH						
Zero	7%	4%	7%	14%	2%	10%
One	30%	24%	28%	39%	36%	29%
Two	31%	35%	32%	23%	28%	27%
Three or more	15%	16%	17%	12%	21%	13%
DK/Refused	17%	21%	16%	12%	13%	21%
Avg.	1.7	1.8	1.7	1.4	1.9	1.6
Licensed Drivers in HH						
Zero	3%	2%	3%	7%	2%	--
One	19%	19%	22%	17%	13%	19%
Two	20%	17%	22%	23%	19%	25%
Three or more	8%	12%	14%	11%	18%	10%
Refused	46%	50%	39%	42%	48%	46%
Avg.	1.9	2.0	1.9	1.8	2.2	1.9
Employed in HH						
Zero	4%	4%	5%	8%	1%	4%
One	30%	25%	33%	36%	27%	29%
Two	30%	32%	28%	28%	40%	32%
Three or more	14%	15%	14%	11%	15%	12%
DK/Refused	21%	24%	20%	17%	17%	23%
Avg.	1.8	1.8	1.8	1.6	1.9	1.8

***Bold** indicates significantly higher percentages at the 95% confidence level

Table 25a: Loyalty Segments – Transit Usage Characteristics

Demographics	2011 Total (n=761)	Loyal Advocates (n=190)	Secure (n=291)	Vulnerable Captive (n=109)	Vulnerable Satisfied (n=85)	At Risk (n=52)
Length of usage						
2 yrs or less	39%	40%	38%	34%	51%	29%
3 to 5 years	21%	17%	22%	23%	15%	33%
6 to 10 years	17%	19%	19%	15%	18%	14%
11+ years	21%	24%	21%	27%	11%	23%
Bus/Light Rail						
Local buses	83%	78%	83%	84%	86%	94%
Light rail	65%	64%	66%	67%	64%	62%
Circulators	29%	28%	31%	27%	25%	40%
Days per week ride bus (among bus riders)						
1 to 5 days	66%	62%	71%	63%	64%	63%
6 or 7 days	32%	38%	25%	36%	32%	37%
Days per week ride light rail (among light rail riders)						
1 to 5 days	78%	72%	78%	84%	83%	72%
6 or 7 days	19%	25%	18%	16%	13%	19%
Riding more/less						
More often	46%	51%	50%	35%	45%	33%
Less often	12%	10%	9%	17%	17%	23%
Same/DK	39%	35%	41%	48%	38%	44%
Destinations						
Work	57%	48%	59%	60%	58%	65%
Shopping/ Restaurants	41%	45%	39%	43%	36%	36%
Visit friends/ relatives	28%	26%	28%	38%	21%	27%
Personal business	24%	26%	18%	28%	26%	31%
School	24%	27%	25%	20%	27%	15%
Recreation	22%	23%	22%	28%	13%	19%
Medical/dental	17%	27%	12%	19%	13%	14%
Likely to recommend (4+5)	83%	100%	94%	66%	76%	31%

***Bold** indicates significantly higher percentages at the 95% confidence level

Table 25b: Loyalty Segments – Transit Usage Characteristics

	2011 Total (n=761)	Loyal Advocates (n=190)	Secure (n=291)	Vulnerable Captive (n=109)	Vulnerable Satisfied (n=85)	At Risk (n=52)
Payment Method						
Cash	40%	35%	43%	36%	42%	46%
Pass	63%	66%	60%	67%	65%	60%
Type of Pass (among those w/pass)						
All day/3-day/ 7-day	41%	35%	43%	38%	44%	58%
Monthly pass	37%	41%	36%	34%	33%	32%
Smart/Platinum/ Metro	17%	15%	20%	15%	13%	16%
College/student	9%	12%	6%	14%	15%	--
# of transfers						
None	23%	27%	23%	20%	22%	19%
One	23%	21%	21%	30%	20%	21%
Two or more	54%	51%	56%	50%	54%	60%

***Bold** indicates significantly higher percentages at the 95% confidence level

Table 26: Loyalty Segments – Electronic/Media Characteristics

	2010 Total (n=732)	Loyal Advocates (n=173)	Secure (n=238)	Vulnerable Captive (n=103)	Vulnerable Satisfied (n=95)	At Risk (n=70)
Access to Internet	78%	78%	77%	78%	87%	79%
Cell Phone	81%	79%	80%	80%	95%	75%
Source for Transit Information						
Transit/Bus Book	50%	48%	51%	50%	45%	60%
Call 602-253- 5000/Call Valley Metro	42%	46%	41%	47%	38%	44%
Internet/Valleymetro. org	40%	32%	42%	52%	46%	40%
Schedules at bus stops/shelters	17%	18%	16%	14%	18%	19%
Cell phone/mobile phone	12%	8%	12%	19%	18%	8%
Valley Metro (unspecified)	9%	7%	10%	9%	12%	6%
Bus Driver	7%	6%	8%	8%	11%	2%
Friends/family	7%	10%	6%	6%	6%	4%
Likely to use cell phone or handheld to get transit info (4+5)	71%	72%	76%	65%	72%	62%

***Bold** indicates significantly higher percentages at the 95% confidence level

VI. Source for Public Transit Information

Although it remains in the top tier for transit information sources, mentions for the transit book have decreased significantly from 2010 (50%, down from 66%). The Valley Metro telephone line and Internet sources are the second most frequently mentioned sources for transit information (42% and 40%, respectively) and are approaching usage levels reported for the transit book. Usage of cell phones/mobile devices experienced a significant increase in mentions from last year (12%, up from 2%).

Table 27a: Sources for Public Transit Information

Information Sources	2011 (n=761)	2010 (n=732)	2009 (n=717)	2008 (n=653)
Transit/Bus Book	50%	66%	63%	70%
Call 602-253-5000/Call Valley Metro	42%	40%	34%	39%
NET Internet/Valleymetro.org	40%	40%	59%	49%
Internet	38%	40%	59%	49%
Valleymetro.org	21%	23%	28%	32%
Google	2%	1%	2%	1%
Schedules at bus stops/shelters	17%	15%	16%	12%
Cell phone/mobile phone	12%	2%	3%	2%
Valley Metro (unspecified)	9%	9%	16%	9%
Bus Driver	7%	10%	3%	5%
Friends/family	7%	7%	5%	7%
Other riders	6%	9%	4%	5%
Kiosks	5%	2%	1%	1%
Individual schedules	4%	3%	1%	2%
Work/School	2%	2%	4%	3%
On the bus/on the bus pamphlets	1%	1%	2%	1%
Light rail/bus stop station	1%	-	-	-
Newspaper	-	-	3%	1%
TV//TV news	-	-	2%	-
Other	2%	2%	4%	1%
Don't know/NA	5%	4%	5%	3%

Q20: Please list for me all the sources that you have used to obtain information about bus routes or service in the past year. *Note: Question was changed in 2008 from: What is your preferred source of information about the bus system? Where else do you turn for information about the bus system? **Note: This question was changed in 2009 to reference "transit service" where previously the question had just said "service." ***Bold** indicates significantly higher percentages at the 95% confidence level

Riders who use the bus only or combination riders are significantly more likely to report using the transit book than riders who use the light rail exclusively (55% and 56% vs. 23% for light rail only riders). This same usage pattern occurred last year. Conversely, riders who exclusively use the light rail are significantly more likely to use an Internet source than their bus only or combination rider counterparts (49% vs. 36% and 40%).

Riders over 35 years of age are more likely to use a transit book than their younger counterparts (55% vs. 45%). Riders under age 35 are more likely to call the Valley Metro line (47% vs. 38%) along with Non-Caucasians (50% vs. 34%). Additionally, Non-Caucasians are less likely to use the Internet as a source of information (36% vs. 45%).

Table 27b: Sources for Public Transit Information

Information Sources	Total Riders (n=761)	Bus Riders Only (267)	Light Rail Riders (n=494)	Bus/Light Rail Users (n=367)	Light Rail Only Users (n=127)
Transit/Bus Book	50%	56%	47%	55%	23%
Call 602-253-5000/Call Valley Metro	42%	40%	44%	48%	32%
NET	40%	36%	42%	40%	49%
Internet/Valleymetro.org	38%	33%	40%	38%	46%
Internet	21%	19%	22%	22%	21%
Valleymetro.org	2%	2%	2%	2%	4%
Google	17%	16%	17%	20%	9%
Schedules at bus stops/shelters	12%	9%	13%	12%	16%
Cell phone/mobile phone	9%	6%	10%	9%	13%
Valley Metro (unspecified)	7%	6%	8%	10%	na
Bus Driver	7%	6%	6%	6%	6%
Friends/family	6%	3%	7%	6%	7%
Other riders	5%	6%	5%	5%	2%
Kiosks	4%	2%	5%	5%	4%
Individual schedules	2%	2%	2%	3%	1%
Work/School	1%	-	1%	1%	--
On the bus/on the bus pamphlets	1%	-	1%	1%	2%
Light Rail/bus stop station	-	--	-	--	1%
Newspaper	-	--	-	--	1%
TV//TV news	2%	2%	2%	2%	2%
Other	5%	3%	6%	4%	13%
Don't know/NA					

***Bold** indicates significantly higher percentages than other subgroups at the 95% confidence level

Text messaging is the most commonly used application riders use to communicate or stay in touch with other (53%). This is true especially among light rail only riders (63% vs. 49% for bus only and 51% for combination riders) and riders under 55 (57% vs. 30%). **Facebook (32%) and email using a cell phone or handheld device (31%) are the next most popular applications utilized.** Light rail only riders use both applications more than their bus only and combination rider counterparts. Although utilized, websites (9%), MySpace (8%), Twitter (4%) and Google (4%) are less popular

In general, light rail only riders are more likely to use electronic communications to communicate. Not only do they have a higher propensity to utilize text messaging, Facebook and email using a cell phone but they are also less likely to claim they would NOT use an electronic communication source (12% vs. 17 and 18%).

Table 28: Electronic Communications Preferences

Electronic Communication Preferences	Total Riders (n=761)	Bus Riders Only (267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Text messages using phone or handheld device	53%	49%	54%	51%	63%
Facebook web page	32%	28%	35%	32%	45%
E-mail using cell phone or handheld device	31%	20%	37%	37%	37%
Website	9%	6%	10%	11%	8%
MySpace web page	8%	6%	9%	9%	9%
Using Twitter	4%	3%	5%	4%	6%
Google	4%	3%	4%	5%	3%
Phone (unspecified)	3%	7%	2%	2%	1%
Cell phone	3%	4%	2%	2%	3%
Yahoo	2%	2%	2%	3%	2%
Email using desktop	2%	2%	2%	3%	2%
Valleymetro.org	2%	2%	2%	2%	2%
Nothing	17%	17%	16%	18%	12%
Other	10%	11%	9%	10%	9%
Don't know/NA	5%	4%	3%	3%	2%

People use many different resources to communicate and stay in touch with others. What applications or websites do you use to gather information or communicate with others?

***Bold** indicates significantly higher percentages than other subgroups at the 95% confidence level

Seven in ten (71%) of all riders claim they would be very or somewhat likely to use a cell phone or some other handheld device to get transit information. All light rail riders report a higher likelihood to use a handheld device for transit information than those who ride the bus exclusively (74% vs. 65%). Additionally, bus only riders claim they would be not at all likely to use a handheld device significantly more than all light rail riders (18% vs. 11%).

Riders under 55 years of age claim they would be “very” or “somewhat” likely to use a cell phone or some other handheld device to get transit information (73% vs. 60%). On the flip side, those over 55 provided more “not at all likely” ratings (23% vs. 12%).

Table 28: Likelihood to use phone, or some other handheld device to get transit information

Rating	Total Riders (n=761)	Bus Riders Only (n=267)	Light Rail Riders (n=494)	Bus/Light Rail Riders (n=367)	Light Rail Only Riders (n=127)
Top two (4+5 ratings)	71%	65%	74%	75%	72%
Very Likely	46%	43%	47%	49%	42%
Somewhat Likely	25%	23%	27%	26%	30%
Not very Likely	13%	14%	13%	12%	13%
Not at all Likely	14%	18%	11%	11%	13%
Don't know	2%	2%	2%	2%	2%

***Bold** indicates significantly higher percentages at the 95% confidence level.

Appendix A

Rider Satisfaction Telephone Survey 2011

Good _____, this is _____ calling for WestGroup Research in Phoenix on behalf of Valley Metro. We are conducting a study about the transit service in the Valley. We are asking only for your opinion and are not selling anything.

N=180 Bus Riders (YES in QSCRA – a.)

Maximum N=20 Light rail only riders (Yes in SCRA – c but NO in SCRA – a AND –b)

Initial Quota 100 for Phoenix residents or 50% of the total telephone interviews;

B. Male/Female = 50%/50%.

Total telephone sample: 200

SCRA. Do you ever ride.. READ LIST. YES/NO FOR EACH

- a. Local city buses (Including Express/RAPID buses and Mesa LINK)
- b. Neighborhood circulator buses such as
Flash/ALEX/GUS/ORBIT/SMART/MARY/DASH
- c. Metro/Light rail
- c. No/DK -- Thank and Terminate

SCRB. Do you, or does anyone in your household work for a marketing research company or the local transit system? (IF YES, TERMINATE)

SCRC. What city do you live in? MAXIMUM 100 INTERVIEWS WITH PHOENIX RESIDENTS IN THE FIRST 200 COMPLETES WITH BUS RIDERS

- a. Phoenix
- b. Scottsdale
- c. Tempe
- d. Mesa
- e. Chandler
- f. Glendale
- g. Gilbert
- h. Peoria
- i. Avondale
- j. Other (SPECIFY: _____)
- k. Refused/NA

SCRD. RECORD GENDER:

- a. Male
- b. Female

1. How long have you been using public transit as a means of transportation in the Valley?

- a. Less than 6 months
- b. 6 months to 1 year
- c. 1 to 2 years
- d. 3 to 5 years
- e. 6 to 10 years
- f. 11 to 20 years

- g. More than 20 years
 - h. Don't know/NA
2. IF BUS IN SCRA: In an average week, how many days a week do you ride the bus (THIS DOES NOT INCLUDE LIGHT RAIL TRIPS)?
- a. Less than once a week
 - b. 1 day per week
 - c. 2 days
 - d. 3 days
 - e. 4 days
 - f. 5 days
 - g. 6-7 days
 - i. DK
 - j. No answer
3. IF LIGHT RAIL IN SCRA: In an average week, how many days a week do you ride the light rail (THIS DOES NOT INCLUDE BUS TRIPS)?
- a. Less than once a week
 - b. 1 day per week
 - c. 2 days
 - d. 3 days
 - e. 4 days
 - f. 5 days
 - g. 6-7 days
 - i. DK
 - j. No answer
4. In general, do you use public transit...? (Yes/No for each)
- a. Monday through Friday
 - b. Saturday
 - c. Sunday

NEW1. Compared to one year ago, would you say that you are using public transit more often, less often or the same as you did a year ago?

- a. More often
- b. Less often
- c. The same
- d. Don't know

NEW1a: IF LESS OFTEN IN NEW1: Why do you think you are using public transit less often than you were one year ago? What other reasons?

5. Do you ever ride.. READ LIST. YES/NO FOR EACH
- a. Express/Rapid buses
 - b. Neighborhood circulator buses such as Flash/ALEX/GUS/ORBIT/SMART/MARY/DASH
 - b. Link

6. What times of the day do you usually use public transit? MULTIPLE RESPONSES ALLOWED
- Before 6 am
 - 6 am to 9 am
 - 9 am to 3 pm
 - 3 pm to 6 pm
 - 6 pm to 9 pm
 - After 9 pm

~~NEW2. PHOENIX RESIDENTS ONLY (SCRC-a): Which bus route do you ride most often?
ONE RESPONSE ONLY~~

7. What city do you travel around most often using public transit? Next? IF R SAYS MULTIPLE CITIES GET FIRST AND SECOND MENTION

- Phoenix
 - Scottsdale
 - Tempe
 - Mesa
 - Chandler
 - Glendale
 - Gilbert
 - Peoria
 - Avondale
 - Other (SPECIFY: _____)
 - Refused/NA
7. In general, where do you go using public transit? DO NOT READ LIST. PROBE: Where else? MULTIPLE RESPONSES ALLOWED
- Work
 - School
 - Shopping/Restaurant
 - Recreational events
 - Medical/dental appointments
 - Visit relative/friends
 - Take care of personal business
 - Airport
 - Other purposes: SPECIFY: _____
 - DK/No answer
8. What is the distance, in miles, from your home to where you typically GET ON public transit?
- Less than ¼ mile
 - ¼ to ½ mile
 - ½ to ¾ mile
 - ¾ to 1 miles
 - 1 to 2 miles

- f. 2 to 4 miles
- g. More than 4 miles
- h. Don't know

9A. *How do you usually pay for your transit fare? DO NOT READ MULTIPLE RESPONSES ALLOWED*

- a. Cash
- b. Pass (any type including Platinum card)

9B. **IF PASS IN Q9A: What type of pass do you use? DO NOT READ MULTIPLE RESPONSES ALLOWED**

- a. Monthly pass
- b. All day pass/3-day pass/7-day pass
- c. College pass/student pass
- d. Smart card/Platinum Card/Metro Card
- e. Other: SPECIFY
- f. Don't know

10. Which fare do you pay? DO NOT READ

- a. Full
- b. Reduced
- c. Youth
- d. Discounted transit card through employer
- e. Express
- f. Other: SPECIFY
- g. Don't know

11. **IF “monthly pass” or “all day/3-day/7-day pass” in Q9B: Where do you usually purchase your pass? MULTIPLE RESPONSES ALLOWED**

- a. Grocery store
- b. Transit Center
- c. Library
- d. Gov't office
- e. Website
- f. Automatic mail plan
- g. On the bus
- h. Employer
- i. Vending machine
- j. Other: SPECIFY
- k. Don't know

For the next set of questions, please think about your typical trip using public transit in the past 30 days, and by typical I mean the trip you make most often using public transit.

12. How do you typically get to the transit stop where you first board public transit (either bus or light rail)? (IF NECESSARY, on the trip using public transit you have made most often in the past 30 days) MULTIPLE RESPONSES ALLOWED

- a. Walk
- b. Bike

- c. Drive alone
 - d. Drive/ride with others
 - e. Vanpool
 - f. Taxi
 - g. Neighborhood circulator
 - h. Other: SPECIFY
13. How many transfers do you make on your typical one-way trip? NOTE: THIS CAN BE BUS-BUS, BUS-LIGHT RAIL, BUS CIRCULATOR – ANY TRANSIT TO TRANSIT TRANSFER
- a. None
 - b. One
 - c. Two
 - d. Three
 - e. Four or more
14. How many minutes do you spend using public transit during your typical one-way trip?
- a. Less than 15 minutes
 - b. 15 to 29 minutes
 - c. 30 to 44 minutes
 - d. 45 to 59 minutes
 - e. 60 to 90 minutes
 - f. 90 or more minutes
15. After you get off at your last stop on this typical trip, how do you get to that destination? (IF NECESSARY, on the bus trip to make most often) MULTIPLE RESPONSES ALLOWED
- a. Walk
 - b. Bike
 - c. Drive alone
 - d. Drive/ride with others
 - e. Vanpool
 - f. Taxi
 - g. Neighborhood circulator
 - h. Other: SPECIFY

IF SCRA = BUS, ASK Q16:

16. Based on your experience on your typical trip RIDING THE CITY BUS over the past 30 days, please indicate your level of satisfaction with the following BUS service elements. Please use a scale from 1 to 5 where 1 means “very dissatisfied” and a 5 means “very satisfied (6=Don’t know/doesn’t apply). How satisfied are you with... ROTATE LIST
- 11. Ability to transfer between buses
 - 12. Buses running on time
 - 13. Personal space on the bus
 - 14. Accuracy of schedule and route information
 - 15. Driver courtesy
 - 16. Availability of service when needed
 - 17. Customer service when calling 602-253-5000
 - 18. Personal safety on the bus
 - 19. Ease of fare payment
 - 20. Cleanliness inside the bus
 - 21. Distance to nearest bus stop

22. Total travel time
23. Online trip planner
24. Service available to the places you need to go
25. How the driver obeys and enforces rules
26. Personal safety at bus stops
27. Availability of schedule and route information
28. Comfort on the bus (e.g., temperature, noise, seats)
29. Working order of the buses
30. Driver's willingness to assist you
31. Ease of understanding schedules and routes
32. Value of service for fare paid
33. Availability of bus shelters
34. Driver's safe driving
35. Notification of service changes

IF SCRA = LIGHT RAIL, ASK Q17:

17. Based on your experience on your typical trip USING LIGHT RAIL over the past 30 days, please indicate your level of satisfaction with the following LIGHT RAIL service elements. Please use a scale from 1 to 5 where 1 means "very dissatisfied" and a 5 means "very satisfied (6=Don't know/doesn't apply). How satisfied are you with... ROTATE LIST

11. ASK ONLY IF BOTH "a" and "b" in SCRA: Ability to transfer between the bus and light rail
12. Trains running on time
13. Personal space on the train
14. Personal safety on the train
15. Ease of fare payment
16. Cleanliness inside the train
17. Total travel time
18. Personal safety at light rail stations
19. Availability of schedule information
20. Comfort on the train (e.g., temperature, noise, seats)
21. Value of service for fare paid

18. Using the same 1 to 5 scale, how would you rate your overall satisfaction with the transit service in the Valley? 1= Very dissatisfied 5 = Very satisfied 6= Don't know

- 18a. Please explain the ONE primary reason for your satisfaction rating of ____.
19. Now using a 1 to 5 scale where 1 means "Not at all likely" and 5 means "Very likely"...
READ AND ROTATE ITEMS
- a. How likely are you to recommend the transit service to other people?
 - b. How likely are you to be riding public transit one year from now?
20. Please list for me all the sources that you have used to obtain information about bus routes or transit service in the past year. MULTIPLE RESPONSES ALLOWED. DO NOT READ LIST
- a. Call 602-253-5000
 - b. Schedules at bus stops/shelters

- c. Bus Book/Transit Book
- d. Individual schedules
- e. Internet – PROBE FOR NAME OF WEB SITE
- f. Kiosks
- e. Friends/family member
- f. Other riders
- g. Bus driver
- h. Work/school
- i. Cell phone/mobile phone
- h. Other: SPECIFY _____
- i. DK/No answer

DEMOGRAPHICS

NEW3: People use many different resources to communicate and stay in touch with others. What applications or web sites you use to gather information or communicate with others? DO NOT READ LIST, MULTIPLE RESPONSES ALLOWED

Nothing

Text messages using a cell phone or handheld device

E-mail using a cell phone or handheld device

MySpace web page.

FaceBook web page.

Using Twitter (also known as 'tweeting')

Website: SPECIFY _____

Other: SPECIFY: _____

NEW3A: How likely are you to use your phone, some other handheld device, or the Internet to get transit information or receive transit updates in the future? Are you very likely, somewhat likely, not very likely or not at all likely?

21. Do you have a car, in working condition, available for your personal use (even occasionally)?

- a. Yes
- b. No

22. Do you have a driver's license?

- a. Yes
- b. No

23. What is your age? Are you.. READ LIST

- a. Under the age of 18
- b. 18 to 24
- b. 25 to 34
- c. 35 to 44
- d. 45 to 54
- e. 55 to 64
- f. 65 or older
- g. DO NOT READ Refused

24. Do you have access to the Internet?

- a. Yes
- b. No
- c. Don't know

25. Do you have a cell phone?

- a. Yes
- b. No
- c. Don't know

26. Are you... READ LIST. MULTIPLE RESPONSES ALLOWED

- a. Employed Full-time
- b. Employed Part-time

- c. Student
 - d. Retired
 - e. House spouse
 - f. Unemployed
 - g. DO NOT READ: OTHER: Specify
 - h. DO NOT READ: Refused
27. What is your race or national origin?
- a. Hispanic/Mexican American
 - b. Black
 - c. Asian/Pacific Islander
 - d. American Indian
 - e. White
 - f. Other
 - g. No answer
28. Thinking about your entire household, including yourself, how many... READ LIST
- a. people are in your household?
 - b. children under 18 are in your household?
 - c. cars are in your household?
 - d. drivers with a valid license are in your household?
 - e. people in your household are employed?
29. What is the combined total annual income of all members of your household? (READ LIST)
- a. Under \$10,000
 - b. \$10,000-\$20,000
 - c. \$20,001-\$30,000
 - d. \$30,001-\$50,000
 - e. \$50,001-\$60,000
 - f. \$60,000 - \$75,000
 - g. More than \$75,000
 - h. DK
 - i. NA/REF

That completes the survey. Thank you very much for your cooperation.
Please record phone number: _____