



Rider Satisfaction Survey Total Market 2006

Prepared For:

**Valley Metro
Fall 2006**

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Executive Summary

This report presents the results of the tenth Rider Satisfaction Tracking Survey, which was conducted in October and November 2006. Data for the rider satisfaction study in 2006 was collected using two methodologies – telephone and intercept interviews. The total sample for the Rider Satisfaction study was 544. A total of 185 interviews were completed by telephone and 359 through intercept interviews. The overall margin of error for the study is ± 4.4 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 Characteristics

- The length of time riders have been using the bus is down slightly in 2006, with rider's average length being 4.8 years compared to 5.9 years in 2005.
- Approximately two-thirds of those who ride the bus do so almost daily (68% ride five to seven days a week).
- Almost half of those surveyed indicated they have been riding the bus more frequently during the past year than previously (46%). Only 11% reported riding the bus less frequently than a year ago.
- Slightly more than half of all riders (53%) indicated they ride the bus because they do not have a car.
- Slightly less than one in four riders indicated that a vehicle was available for their use during their last trip (22%), indicating that 78% are dependent on transit service. This continues a trend that began last year when only 28% reported having a vehicle available in 2005, down from 46% in 2004.

Trip Characteristics

- Approximately three in five riders surveyed reported that they typically pay full fare to ride the bus (64%, up significantly compared to 56% reported in 2005).
- When asked how they typically pay their bus fare, more than half of the riders indicated they pay cash (53%), while 34% cite a monthly pass.
- Four in five riders, or 82%, report they typically ride only local buses when using the transit system.
- Traveling to and from work remains the top trip destination for bus riders (66%). The second most common trip destination was to or from shopping (34%).
- Five out of seven riders say they feel safe while waiting at Valley bus stops (69% rating it a 1 "very safe" or "2"); this is a significant drop from 85% in 2005.
- Four in five riders (80% rate a 1 "very safe" or 2) of Valley bus riders say they feel safe while riding the bus. This is a significant decline from 93% in 2005.

System Satisfaction Questions

- Approximately 90% of the Valley bus riders say they are satisfied overall with the bus operators (“very” + “somewhat satisfied”). This reflects a slight decrease from 2005 and 2004 where overall satisfaction measured 94% and 96% respectively.
- While satisfaction with driver attributes were lower across the board in 2006 compared to previous years, they remained somewhat consistent between each other with satisfaction with driver helpfulness measuring 90% and satisfaction with driver safety and friendliness both measuring 89%. A large portion of the decreases seem to be reflected in a move by riders to indicate they are now “somewhat satisfied” where in past years they were “very satisfied” with driver attributes, however, there was an increase in the percentage of riders expressing dissatisfaction on most attributes.
- Overall satisfaction with buses dropped slightly in 2006 with six out of seven bus riders indicating they were at least somewhat satisfied with the Valley Metro buses (86% “very” + “somewhat satisfied”). This compares to 91% in 2005 and 93% in 2004. Among the seven specific bus attribute ratings the highest satisfaction levels were given for the appeal of the graphics on the outside of the bus (90%) and ease of using the bus (88%). As has been the trend in the past, the lowest rated of the seven attributes was route frequency (52%).
- Roughly three out of four riders indicated they are satisfied with bus service in the Valley overall (74%). Currently 29% of all riders indicated they were “very satisfied” with the bus service and this is significantly lower than the 44% measured last year, but is more in line with previous tracking data.
- Nearly one in four indicated bus transit service has improved this year (23%), compared to 19% who felt that service was worse.
- Two in seven riders indicated they were “very likely,” to recommend bus service in the Valley to a friend or family member by ranking it a 9 or 10 (28%; see Table 6) and the percentage of those unlikely to strongly recommend the service (i.e., giving a 0 to 6 rating) was 44%.
- Slightly more than four in five riders indicated they have called 602-253-5000 for bus information (83%). Currently, three in eight of those who call the bus information telephone line indicate the helpfulness of the telephone employees is “very good” (46% compared to 54% to 66% from 2002 to 2005). An additional 32% say the telephone employees do a “good” job.

Route Information and Assistance

- Bus riders most frequently indicated that their preferred source for information about the bus system was the Bus Book (mentioned by 66%). Almost as popular, however, was to call Valley Metro directly (54%).
- The vast majority of bus riders report they are at least somewhat satisfied with the current Bus Book (87%), with three in five (60%) stating they are “very satisfied” with the Bus Book.
- Assuming that the Bus Book was not available, three out of five riders indicated that they are most likely to call Valley Metro for route and schedule information (82%). Two-thirds

indicated they are likely to reference postings located at the bus stops (66%) while more than half stated they would refer to other printed maps or schedules (59%) or call for automated trip planning (62%).

- Almost three out of seven bus riders indicated they are aware that Valley Metro offers an online trip planner on their web site (42%). This is a significant increase from previous years when only 26% said they were aware of the service in 2005.
- Among those aware of the online trip planner, more than half (58%) report having used it (24% of the total sample). This is a significant increase from the previous year when 32% of those aware reported using it (or 8% of all riders).
- Nearly nine in ten of the riders who have used the on-line trip planner say it was at least “somewhat easy” to navigate through the tool (89%).

Conclusions

1. It appears that increased light rail construction in Phoenix and Tempe have made it more challenging to be a bus rider in these cities – leading to increased frustration and dissatisfaction. Since close to two-thirds of the riders interviewed for the study are Phoenix residents or were interviewed at a Phoenix bus stop, it is reasonable to assume that a significant proportion of these riders are affected in one way or another by light rail construction. A recent study completed for the City of Tempe also showed a significant decrease in transit usage in and around the downtown area. The impact of construction both for Valley Metro and the riders is most likely reflected in the significant declines in satisfaction with the on-time performance and frequency of the buses. The increased dissatisfaction with bus operators also is likely to be related to construction-related stress, causing operators to seem less friendly and helpful as they deal with changing routes and bus stops on a daily basis.
2. Another way to look at rider satisfaction and loyalty is to evaluate the likelihood riders would recommend Valley Metro transit service to friends and family. By using the “likelihood to recommend” ratings and calculating a Net Promoter Score (subtracting the percentage giving a 0 to 6 rating from the percent giving a 9 or 10 rating) we gain further insight into the overall satisfaction riders have with the Valley Metro transit system. The NPS of –16% shows that riders are not enthusiastic in their perceptions of the system. Other service organizations in the Valley receive NPS ratings of +50% or higher. A negative NPS means that many riders are not using the transit service because it is such a great system, but rather because they do not have other choices. Many riders would not recommend the system to others. The exception to this, however, is among Express riders. These riders are much more likely to be “choice” riders and consequently they are more likely to recommend the system because it works for them.
3. Although work is a primary destination for the majority of bus riders, the data show that riders are using transit to get to a wide variety of other destinations – particularly shopping and social/recreational events. With the increase in transit dependency seen in

the last few years, it is clear that local buses provide access to critical services and mobility to numerous Valley residents.

4. Interestingly, in addition to declines in satisfaction with both bus operators and the buses there also was a decline in the percentage of riders reporting they feel safe both at local bus stops and on the buses. It is possible that all the events in 2006 surrounding the baseline killer and serial shooters have led to an increased sense of vulnerability among transit users as they wait for and ride the bus.
5. The Bus Book continues to be a vital source for information about the transit system and bus riders are extremely satisfied with it. Riders also appear to be very dependent on the Valley Metro help line for information about the system, and it represents the primary “back-up” for the Bus Book. Consequently it is important to keep focusing attention and resources on these two information sources. The Internet is being used more now than ever before, however, it is still a long way from being the preferred or even a plausible source for information for many riders. The on-line trip planner, however, is an excellent tool that is increasing in popularity among riders with Internet access.

I. Introduction and Research Methodology

Valley Metro periodically conducts on-board origin and destination surveys to provide information on bus rider trip-making characteristics, demographics, and service. Each year following the on-board survey, rider satisfaction surveys are conducted with riders to monitor their overall level of satisfaction with the bus operators and the service. Rider satisfaction questions included in the 1991 Origin and Destination Survey function as benchmarks for future rider satisfaction studies. The subsequent schedule for rider satisfaction studies is shown below.

Study	Year
On-board O&D	1991
Rider satisfaction	1993
Rider satisfaction	1994
On-board O&D	1995
Rider satisfaction	1997
Rider satisfaction	1998
Rider satisfaction	1999
On-board O&D	2001
Rider satisfaction	2002
Rider satisfaction	2003
Rider satisfaction	2004
Rider satisfaction	2005
Rider satisfaction	2006

This report presents the results of the tenth Rider Satisfaction Tracking Survey, which was conducted in November and December 2006.

Throughout the report, wherever possible, data collected during the 2006 Rider Satisfaction Survey will be compared to data collected during the previous tracking studies, as well as to the data collected in the three origin and destination studies, to provide insight into changes and trends.

A. Sample

Data for the rider satisfaction study in 2006 was collected using two methodologies – telephone and intercept interviews. This approach was taken since the database from the 2001 Origin and Destination Study, which has been used in the past, would not provide an adequate sample. Additionally it was felt that rider databases available from Valley Metro might not be representative of the entire rider population. Consequently, the telephone portion of the study was completed with respondents from a database of riders generated from the Valley Metro automatic mail database and the 2001 Origin and Destination database. The remaining interviews were completed via intercepts at bus stops around the Valley.

The total sample for the Rider Satisfaction study was 544. A total of 185 interviews were completed by telephone and 359 through intercept interviews. The interviews were conducted during October and November 2006. The telephone survey took approximately 10 minutes to complete and the intercept survey approximately 5 minutes.

The interviewing began with the completion of 400 surveys (260 intercepts and 140 telephone). The City of Phoenix commissioned an oversample of its residents and riders using its services to increase the final sample size of riders who are using Phoenix-based routes. In total, 416 surveys were conducted with Phoenix riders in order to have a large enough sub-sample for meaningful analysis. For analysis of the total market data, the proportion of Phoenix-base riders was weighted to its percentage representation in the initial 400 interviews – 65%. The total weighted sample has a margin of error of $\pm 4.3\%$. The subgroup of Phoenix riders has a margin of error of $\pm 4.9\%$. Analysis of the Phoenix market riders is presented under separate cover.

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

Intercepts Locations

Location	Number Completed
Central Station	40
Metro Center	40
North side Van Buren (Central/1 st Ave.)	40
NW Corner Central and 1 st Ave.	40
Sunnyslope Station	40
Ed Pastor Transit Center	40
Superstition Spring Center	20
College Ave (University/5 th Street)	20
Loloma Station	20
Chandler Fashion Center	20
Paradise Valley Mall	20
Desert Sky Pavilion	19

The table below shows the breakdown of weighted-completed interviews by city of residence of the respondent.

City	Number of Interviews	Percentage of Interviews
Phoenix	354	65%
Mesa	48	9%
Glendale	37	7%
Scottsdale	31	6%
Tempe	31	6%
Chandler	16	3%
Gilbert	8	2%
Avondale	6	1%
Peoria	5	1%
Other	7	1%

B. Questionnaire Design

The questionnaire used in 2006 was similar to that used in previous surveys. A substantial portion of the questions in the survey instrument was repeated from previous studies to ensure comparability of data. However, some additional questions were added to the instrument to gather information needed by Valley Metro.

It is important to note that the intercept interview was shorter in length than the telephone instrument. Due to the need to allow riders to make their buses and/or continue on their trips, the intercept interview was structured to be approximately 5 minutes in length. The telephone instrument was closer to 10 minutes in length and included more open-ended questions. The sample base for each question is presented in the table or graph corresponding to the question.

C. Data Processing

Data for the telephone portion of the 2006 Rider Satisfaction Tracking Study was gathered using computerized interviewing software. Intercept interviews were completed on paper questionnaires. All intercept interviews and open-ended questions from the telephone instrument were coded and entered into a database for cross-tabulation and statistical analysis.

D. Final Report

The final report includes both a narrative summary of the rider satisfaction survey as well as a comparison to data from the nine previous rider satisfaction studies. Computer generated tables are provided in an appendix to this report.

For reference, the samples normally referred to in this report are shown below with their size and margin of error at 95% confidence.

Sample	Size	Margin of Error
1991 Origin & Destin.	4,100	$\pm 1.6\%$
1993 Riders	505	$\pm 4.5\%$
1994 Riders	401	$\pm 5.0\%$
1995 Origin & Destin.	5,169	$\pm 1.4\%$
1997 Riders	416	$\pm 5.0\%$
1998 Riders	411	$\pm 5.0\%$
1999 Riders	768	$\pm 3.6\%$
2001 Origin & Destin.	4,234	$\pm 1.5\%$
2002 Riders	401	$\pm 5.0\%$
2003 Riders	411	$\pm 4.9\%$
2004 Riders	404	$\pm 5.0\%$
2005 Riders	518	$\pm 4.4\%$
2006 Riders	544	$\pm 4.3\%$

E. Characteristics of the Sample

In 2006, riders were equally represented by gender with 50% being male and 50% being female. Almost two-thirds (59%) were between the ages of 25 and 54, while 25% were under the age of 25. More than half were of Caucasian ethnicity; 19% were Hispanic or Latino. Average household income was \$28,000.

Table 1: Summary of Demographic Characteristics

Demographics	2006	2005	2004	2003	2002	2001	1999	1998	1997	1995
Gender										
Male	50%	52%	50%	56%	50%	50%	57%	43%	44%	49%
Female	50%	48%	50%	44%	50%	50%	43%	57%	56%	51%
Age										
Under 25	25%	30%	23%	28%	29%	33%	30%	29%	23%	35%
25 to 54	59%	45%	58%	55%	48%	58%	55%	50%	53%	57%
55 and older	16%	21%	19%	17%	21%	9%	15%	20%	22%	8%
Refused	-	4%	-	-	2%	-	-	1%	2%	-
Average	39.1	38.9								
Languages										
English only	78%									
English +Spanish	17%									
Spanish only	1%									
Other	3%									
Ethnic Origin										
White	64%	58%	56%	58%	61%	52%	64%	70%	69%	55%
Hispanic	19%	23%	21%	21%	18%	24%	15%	15%	15%	22%
Black	11%	12%	17%	12%	9%	13%	11%	8%	10%	14%
Other	6%	5%	6%	9%	12%	11%	10%	7%	5%	9%
Marital status										
Single	n/a	76%	80%	79%	75%	n/a	76%	75%	68%	73%
Married	n/a	23%	20%	21%	25%	n/a	24%	25%	32%	27%
Income										
< \$20,000	40%	48%	53%	38%	39%	46%	51%	45%	45%	51%
\$20,001 to \$30,000	26%	18%	19%	21%	19%	17%	20%	19%	16%	19%
\$30,001 to \$40,000	10%	10%	6%	12%	22%	12%	8%	8%	14%	8%
\$40,001 to \$60,000	17%	17%	13%	21%	7%	14%	14%	14%	13%	14%
\$60,000+	7%	6%	9%	8%	13%	11%	7%	14%	12%	8%
Avg. in ,000	\$28.0	\$23.3								

II. Rider Characteristics

A. Length of Time Riding the Bus

The length of time using the bus is down slightly in 2006, with rider's average length being 4.8 years compared to 5.9 years in 2005. This seems to be reflecting a drop in the number riders reporting to have used the bus for 11 or more years (10% in 2006 compared to 18% in 2005). Riders paying a senior or disabled fare are more likely to be long-term riders than those paying a full fare (7.6 and 8.6 years, respectively vs. 4 years).

Table 2: Length of Time Using Bus in Phoenix

Time Period	2006 (n=544)	2005 (n=518)
<6 months	7%	14%
6 to 12 months	13%	11%
1-2 years	26%	18%
3-5 years	28%	23%
6-10 years	15%	15%
11-20 years	6%	13%
20 years +	4%	5%
Avg. in yrs	4.8	5.9

Q21: How long have you been using the city bus as a means of transportation in metro-Phoenix?

*Note: Question originated in 2005.

B. Frequency of Riding the Bus

Approximately two-thirds of those who ride the bus do so almost daily (68% ride five to seven days a week). This is very much in line with the data collected in past Rider Satisfaction studies (i.e., 65% in 2005, 67% in 2004 and 65% in 2003). Older riders are more likely to report riding the bus less than five days a week (40% of those age 55 or older), whereas the vast majority of those under age 55 report using the bus five or more days a week (84% of those under age 25; 75% of those ages 25 to 54). In addition, riders who use the bus to go to work (79%) and Phoenix residents tend to be more frequent riders than those living in other areas of the Valley (72% ride 5+ days vs. 61%)

Table 3: Frequency of Riding Bus Each Week

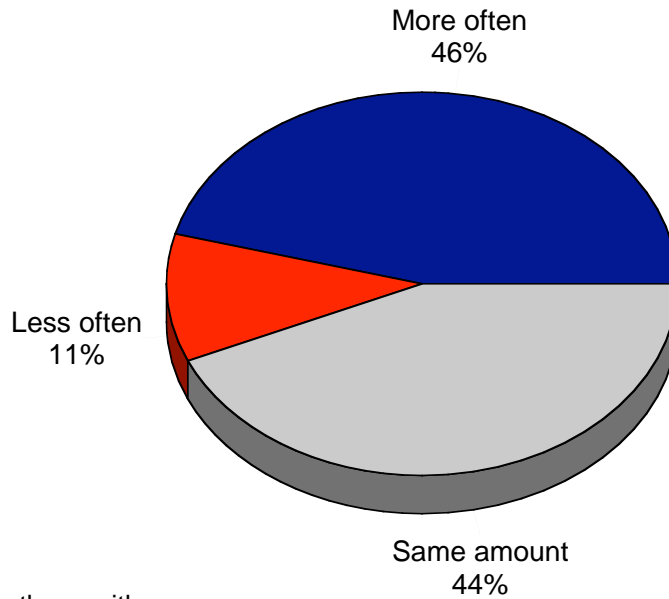
Frequency	2006	2005	2004	2003	2002	2001	1999	1998	1997	1994
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Less than 1x/ wk	1%	3%	1%	3%	5%	6%	6%	3%	6%	11%
One day	2%	3%	4%	3%	5%	4%	7%	5%	5%	10%
Two days	7%	8%	7%	7%	8%	6%	9%	7%	8%	10%
Three days	9%	11%	10%	10%	9%	7%	10%	11%	12%	9%
Four days	13%	10%	11%	12%	10%	10%	7%	15%	12%	8%
Five days	31%	39%	40%	40%	39%	43%	17%	42%	40%	42%
Six to Seven days	37%	26%	27%	25%	24%	24%	44%	17%	17%	10%

Q1: On average, how many days a week do you ride the bus?

Almost half of those surveyed indicated they have been riding the bus more frequently during the past year than previously (46%). This is particularly true among younger riders (63% of riders under age 25 vs. 29% of those ages 55 and older); older riders were more likely to say their riding habits have not changed. Riders who indicated they use the bus less than five days a week are more likely to also report they are riding the bus less often than they did a year ago (22%).

Changes in Riding Frequency

Would you say you are riding the bus more often, less often, or the same as you were one year ago?



Among those with a response.

C. Reasons for Riding the Bus – Telephone only

More than half of the riders interviewed (53%) indicate they ride the bus because they do not have a car. One in four riders (26%) listed some type of disability as their primary reason for riding; while an additional 11% indicated that they either didn't have a driver's license (8%) or were no longer driving (3%).

Economic reasons for riding the bus are given by significantly fewer riders. Saving money (9%), saving wear and tear on a car (2%) or simple convenience (5%) being the top reasons mentioned by these riders.

Women were slightly more likely than men to indicate they did not have a car (59% compared to 47% of men), while those over the age of 25 were most likely to cite saving money (10% vs. 3%).

Table 4: Reasons for Riding the Bus

Reasons	2006 (n=185)
Dependent	
Don't have a car	53%
Disabled	26%
No drivers license	8%
No longer driving	5%
Choice	
Saves money	9%
Convenient	5%
Saves car wear and tear	2%
To get to work	2%
Protect the environment	1%
Other	4%

Q5: What is the main reason you ride the bus?

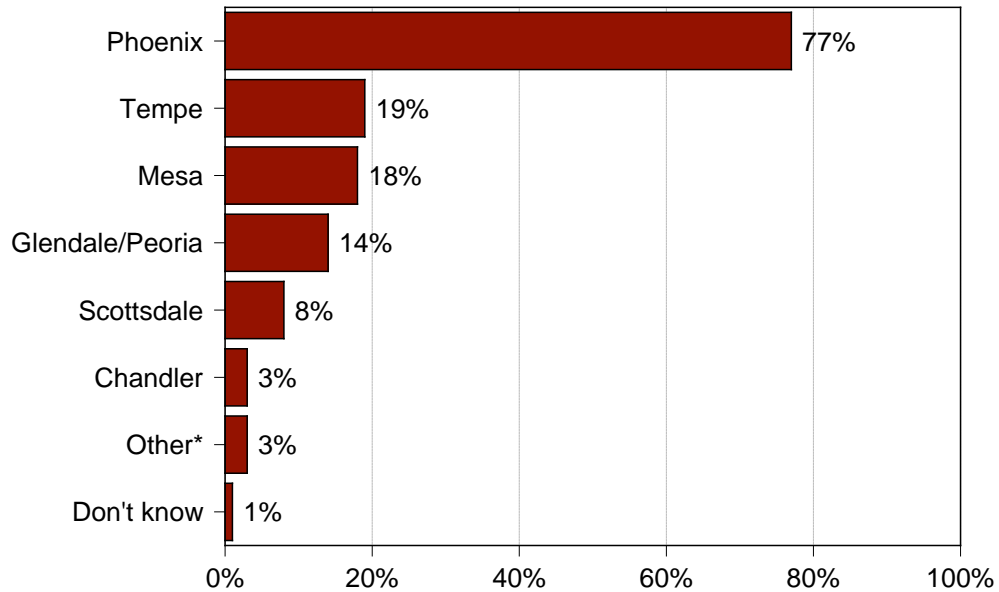
* Telephone Only

D. City in which Most Frequently Ride Bus – Telephone only

As found in previous studies, Phoenix is the city that most riders travel around using the bus (77%) while Tempe and Mesa are distant second and third ranked cities (19% and 18%, respectively).

City Travel Around Most in Bus

What city do you travel around most often using the bus?



n=185

*Includes all responses with 1% consensus or less.

E. Vehicle Available

Slightly less than one in four riders indicated that a vehicle was available for their use during their last trip (22%), indicating that 78% are dependent on the bus system for transportation. This continues a trend that began last year when only 28% reported having a vehicle available in 2005, down from 46% in 2004. Riders over the age of 55 (33%) were more likely than younger riders to indicate they had a vehicle available during their last bus trip (compared to 16% for those under the age of 25).

As seen in the past, there was a significant difference between local and express riders on vehicle availability (50% of express riders indicated a vehicle was available compared to only 20% of local riders).

Vehicle Available for Bus Trip
Percent saying "Yes"

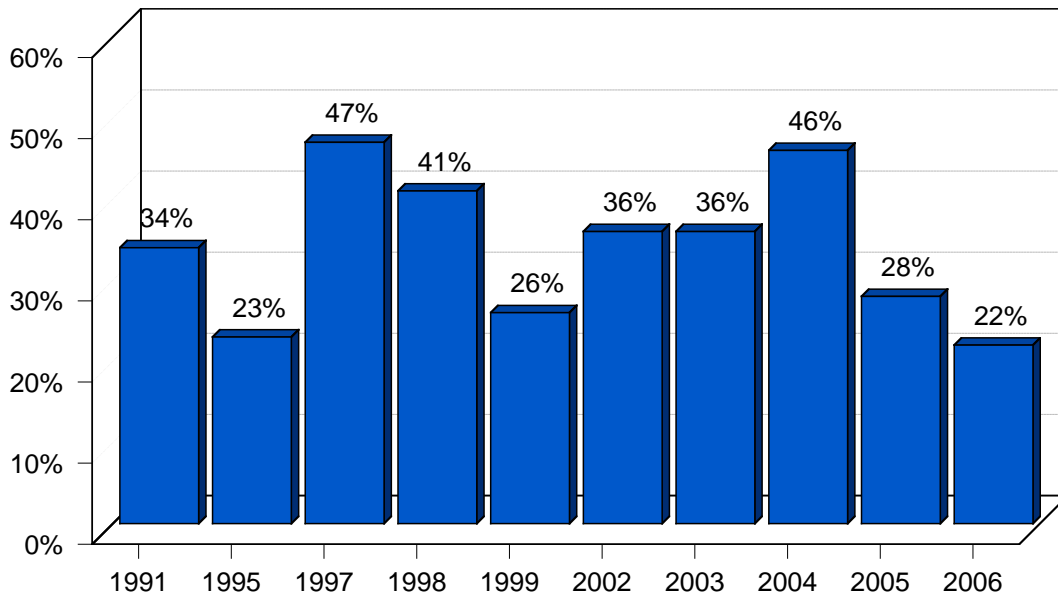


Table 5: Vehicle Available for Bus Trip

	2006	2005	2004	2003	2002	1999	1998	1997	1995	1991
Yes	22%	28%	46%	36%	36%	26%	41%	47%	23%	34%
No	78%	72%	54%	64%	64%	74%	59%	53%	77%	66%

Q13: In thinking about the last trip you made, was a vehicle available to you, either as a passenger or driver, to make the trip?(Among those with a response.)

III. Trip Characteristics

A. Type of Fare Paid

Approximately three in five riders surveyed reported that they typically pay full fare to ride the bus (64%, up significantly compared to 56% reported in 2005). Those paying with a disability discount were the second most prevalent group at 13% while Youth and Senior fares dropped to 10% and 7% (from 18% and 11% reported in 2005). Riders who indicate they ride the bus to work were most likely to indicate that they pay a full fare in comparison to riders who do not use the bus for work (79% versus 35%).

Type of Fare Paid

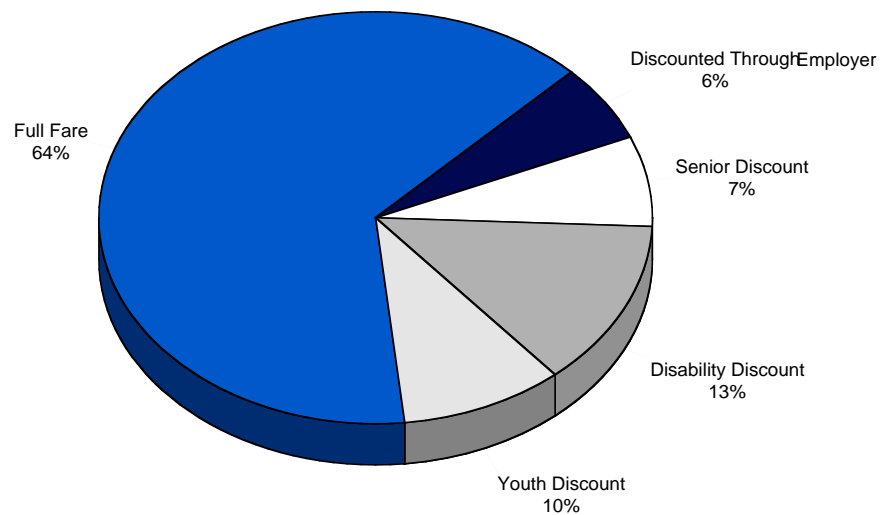


Table 6: Type of Fare

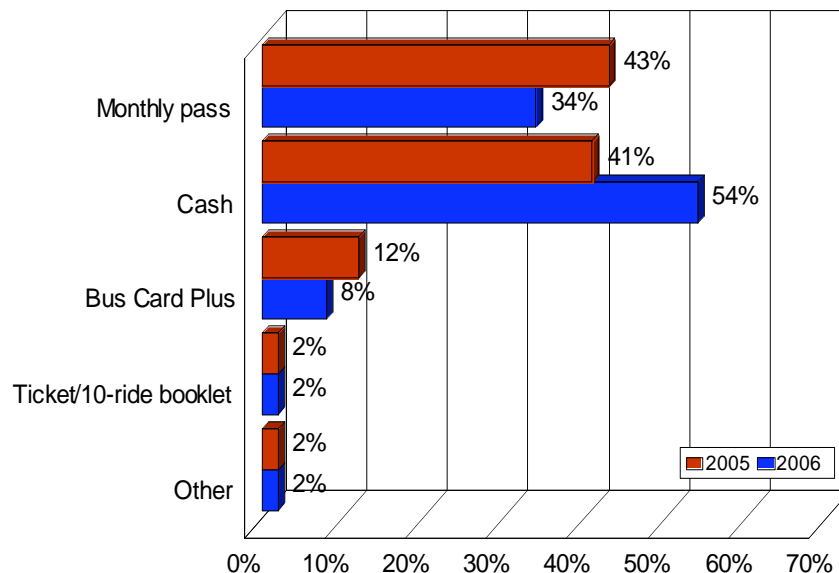
Fare	2006	2005	2004	2003	2002	2001
Total	100%	100%	100%	100%	100%	100%
Full	64%	56%	60%	52%	53%	73%
Youth discount	10%	18%	13%	18%	17%	15%
Disability discount	13%	14%	11%	13%	20%	9%
Senior discount	7%	11%	10%	9%	10%	3%
Discounted bus card through employer*	6%	-	6%	8%	n/a	n/a
Fare	1999	1998	1997	1995	1994	1993
Total	100%	100%	100%	100%	100%	100%
Full	68%	49%	62%	72%	65%	67%
Youth discount	11%	21%	11%	17%	16%	16%
Disability. discount	14%	22%	15%	8%	7%	7%
Senior discount	7%	8%	12%	3%	12%	10%
Discounted bus card through employer*	n/a	n/a	n/a	n/a	n/a	n/a

Q19: Which fare do you pay? *Category added in 2003, not used in 2005

When asked how they typically pay their bus fare, more than half of the riders indicated they pay cash (53%), while 34% cite a monthly pass. Those younger than 55 years old were most likely to say they paid cash (58% compared to 31% for those older) as well as those who use the bus to get to work (57% compared to 47% those who do not), while those receiving a disability discount were most likely to cite using a monthly pass (77% compared to an average of 25% for all other fare types).

Type of Fare Payment

What do you typically use to pay when you take the bus?

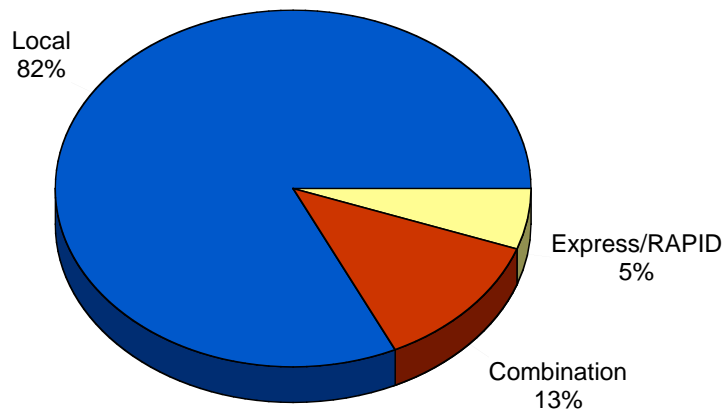


B. Type of Bus

Four in five riders, or 82%, report they typically ride only local buses when using the transit system. Express-only riders are more likely to be older (6% over age 25 compared to 2% for those younger), ride the bus five or more days a week (6% vs. 3% of those using transit less than five days a week), use an employee discount (20% compared to 4% for all other fare types), and to say they were using the bus to get to work (8% compared to 1% who do not use the bus to get to work).

Type of Bus Ridden

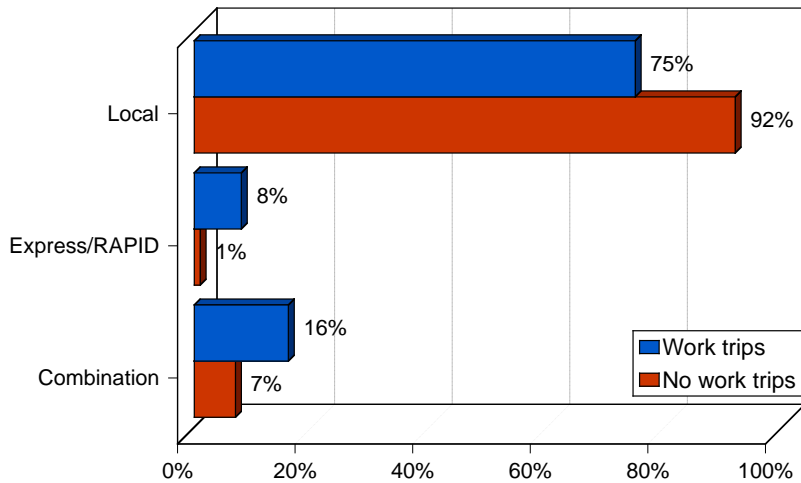
Do you typically ride a local bus or an express bus when you ride?



n=542 (Among those with a response.)

Type of Bus Ridden Use bus for work trips vs. No work trips

Do you typically ride a local bus or an express bus when you ride?



n=544 (Among those with a response.)

C. Trip Destination

Traveling to and from work remains the top trip destination for bus riders (66%). There was a significant increase in the percentage of riders reporting trip destinations in general compared to 2005 data, this is due to a change in this year's question that referenced "trips in general," allowing multiple responses to the question, rather than only "most recent trip."

In particular, riders between the ages of 25 and 54 (82%), those who ride five or more days per week (76%), those using an employee discounted fare (76%), and Express route riders (96%) were those most likely to report that most of their trips were to go to or from work.

The second most common trip destination was to or from shopping (34%). Women (40%) and those over the age of 55 (56%) were most likely to cite shopping as their most common destination.

Social and recreational events rounded out the top three destinations at 21%, with non-whites being the most likely to cite this as destination (29% compared to 17% for whites). Slightly less than one in five riders indicated they take the bus to and from school (18%) and, not surprisingly, these riders are most likely to be under age 25 (45%) and pay a youth fare (68%). More than one in ten riders report using transit to travel to and from medical appointments (13%), with those over the age of 55 citing it more often than their younger counterparts (21% compared to an average of 12% for those under 55).

Table 7: Trip Destinations

Destinations	2005 Total (n=518)	2006 Total (n=544)	2006 Age		
			Under 25 (n=137)	25-54 (n=320)	55+ (n=85)
To/from work	46%	66%	59%	82%	58%
To/from shopping	12%	34%	33%	37%	55%
To/from social/recreation/ sporting events	12%	23%	22%	28%	19%
To/from school	19%	18%	45%	6%	7%
To/from medical appointments	6%	13%	8%	17%	20%
Everywhere	-	1%	-	3%	3%
Other	4%	3%	3%	3%	9%
Don't know/NA	1%	1%	2%	1%	3%

Q4: 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."

D. Safety of Bus Stop – Telephone only

Five out of seven riders say they feel safe while waiting at Valley bus stops (69% rating it a 1 “very safe” or “2”). This is a significant drop from the 85% who gave the same rating in 2005. The biggest discrepancy is among those who rated safety at bus stops a “1” or “very safe” (46% in 2006 compared to 58% in 2005), however, the percent of riders giving a “3” or “4 – not at all safe” rating also increased dramatically from 14% in 2005 to 29% in 2006.

Riders over age 55 or older were most likely to indicate that they felt the buses were “very safe” (60% compared to 39% for those younger).

Table 8: Rider Safety at Bus Stop

Rating	2006	2005	2004	2003	2002	1999	1998	1997
NET Safe (1+2)	69%	86%	88%	87%	81%	87%	79%	77%
1-Very safe	46%	58%	66%	55%	54%	62%	55%	55%
2	23%	28%	22%	32%	27%	25%	24%	22%
3	19%	9%	8%	9%	13%	9%	12%	15%
4-Not at all safe	10%	5%	4%	4%	6%	4%	9%	8%

*Q11: Using the same one to four scale where one means “very safe” and four means “not at all safe,” please rate how safe you felt while waiting at the bus stop for the last trip you made?
(Among those with an opinion.)*

E. Safety of Trip – Telephone only

Four in five riders (80% rate a 1 “very safe” or 2) of Valley bus riders say they feel safe while riding the bus. This is a significant decline from 2005 findings when 93% of the riders indicated they felt safe. Currently, riders report the highest “4-not at all safe” rating since tracking began – 9%, compared to 2% last year and a previous high of 4% in 2003; one in five (20%) gave a “3” or “4” rating up from 7% last year.

Table 9: Rider Safety on Bus

Rating	2006	2005	2004	2003	2002	2001	1999	1998	1997	1995*
NET Safe (1+2)	80%	93%	93%	91%	93%	96%	89%	87%	89%	96%
1-Very safe	58%	73%	74%	61%	71%	61%	76%	65%	72%	57%
2	22%	20%	19%	30%	22%	35%	17%	22%	17%	39%
3	11%	5%	5%	5%	6%	3%	5%	10%	8%	2%
4-Not at all safe	9%	2%	2%	4%	1%	1%	2%	3%	3%	2%

Q12: Again, thinking about the last trip you made on the bus, using a scale from 1 to 4 where one means “very safe” and four means “not at all safe,” please rate how safe you felt the last time you rode the bus? (Among those with an opinion.)

* In 1995 and 1991 the question was phrased, “How safe do you feel riding the bus? Very safe, somewhat safe, not very safe, or not at all safe?”

IV. System Satisfaction Questions

Riders were asked two groups of satisfaction questions relating to their experiences riding the bus. The first related to their satisfaction with the bus operator on their most recently completed bus trip and the second was directed toward their satisfaction with the bus itself. These questions are directly comparable to the system satisfaction questions asked during the Origin and Destination Surveys of past years, as well as to previously completed Rider Satisfaction Surveys.

A. Satisfaction with Bus Operators

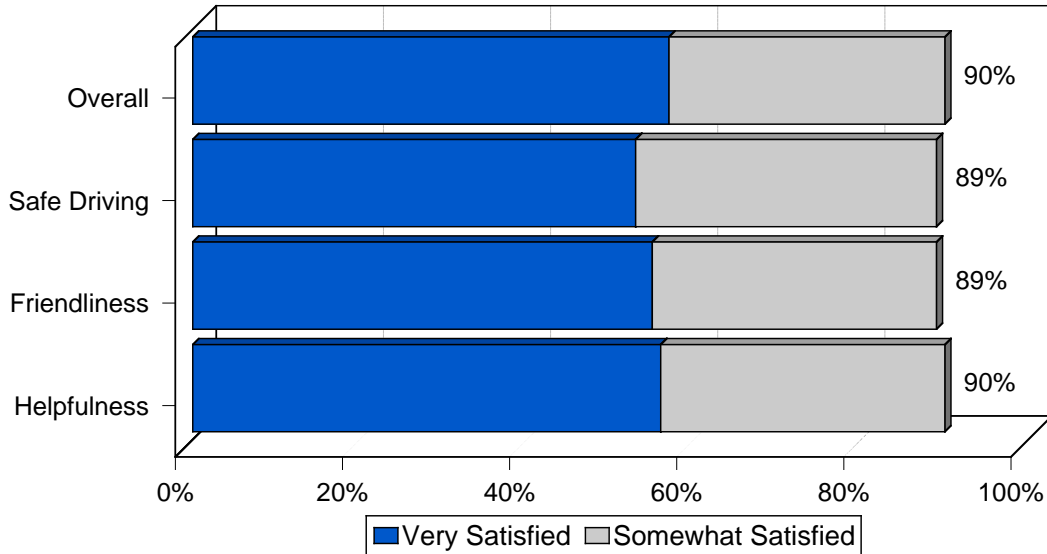
Approximately 90% of the Valley bus riders say they are satisfied overall with the bus operators (“very” + “somewhat satisfied”). This reflects a slight decrease from 2005 and 2004 where overall satisfaction measured 94% and 96% respectively.

While satisfaction with driver attributes were lower across the board in 2006 compared to previous years, they remained somewhat consistent between each other with satisfaction with driver helpfulness measuring 90% and satisfaction with driver safety and friendliness both measuring 89%. **A large portion of the decreases seem to be reflected in a move by riders to indicate they are now “somewhat satisfied” where in past years they were “very satisfied” with driver attributes, however, there was an increase in the percentage of riders expressing dissatisfaction on most attributes** (6% to 10% dissatisfied for operator overall; 5% to 11% for safe driving; 8% to 11% for friendliness; and 8% to 11% for helpfulness).

Riders age 55 or older are most likely to indicated they were “very” or “somewhat satisfied” with the driver overall compared to younger riders (97% compared to 89% for those younger). Express riders were slightly less likely to say they were satisfied with the driver’s safe driving (81% compared to 89% for local riders). Less frequent riders were more likely to be satisfied with the helpfulness of the driver than frequent riders (93% vs. 88%).

Satisfaction with Bus Operators - 2006

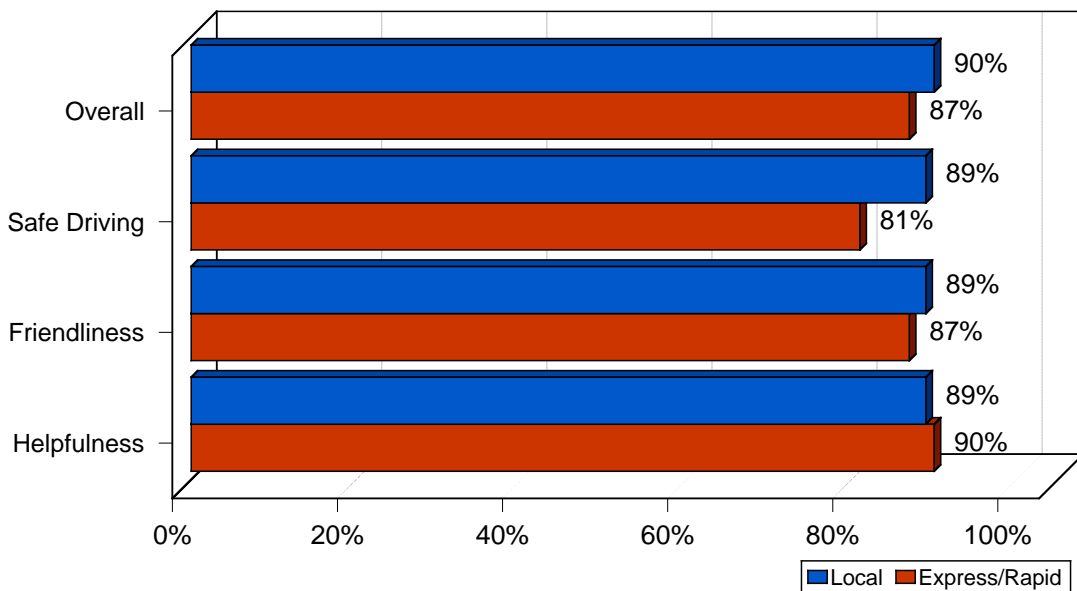
(Very + Somewhat Satisfied)



Among those with an opinion.

Satisfaction with Bus Operators - Local vs. Express/RAPID

(Very + Somewhat Satisfied)



Among those with an opinion.

Table 10: Satisfaction with Bus Operators – Overall Satisfaction

Rating	2006	2005	2004	2003	2002	2001
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	90%	94%	96%	96%	96%	94%
Very satisfied	57%	67%	63%	66%	62%	63%
Somewhat satisfied	33%	27%	33%	30%	34%	31%
Somewhat dissatisfied	6%	4%	2%	3%	3%	4%
Very dissatisfied	4%	2%	2%	1%	1%	2%
Rating	1999	1998	1997	1995	1994	1993
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	92%	93%	96%	94%	96%	97%
Very satisfied	50%	68%	69%	67%	62%	71%
Somewhat satisfied	42%	25%	27%	27%	34%	26%
Somewhat dissatisfied	6%	4%	4%	4%	3%	2%
Very dissatisfied	2%	3%	1%	2%	1%	1%

Q6: Thinking about your last bus trip, how satisfied are you with the driver overall? (Among those with an opinion)

Table 11: Satisfaction with Bus Operators – Safe Driving

Rating	2006	2005	2004	2003	2002	2001
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	89%	96%	97%	97%	95%	95%
Very satisfied	53%	72%	70%	77%	69%	68%
Somewhat satisfied	36%	24%	27%	20%	26%	27%
Somewhat dissatisfied	7%	4%	2%	3%	4%	3%
Very dissatisfied	4%	1%	1%	-	1%	2%
Rating	1999	1998	1997	1995	1994	1993
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	95%	94%	97%	97%	97%	97%
Very satisfied	59%	72%	74%	77%	72%	80%
Somewhat satisfied	36%	22%	23%	20%	25%	17%
Somewhat dissatisfied	4%	3%	2%	2%	2%	2%
Very dissatisfied	1%	3%	1%	1%	1%	1%

Q6: Thinking about your last bus trip, how satisfied are you with driver safety? (Among those with an opinion.)

Table 12: Satisfaction with Bus Operators – Friendliness

Rating	2006	2005	2004	2003	2002	2001
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	89%	92%	94%	93%	95%	92%
Very satisfied	55%	66%	64%	65%	65%	62%
Somewhat satisfied	34%	26%	30%	28%	30%	30%
Somewhat dissatisfied	6%	6%	3%	5%	3%	6%
Very dissatisfied	5%	2%	3%	2%	2%	2%
Rating	1999	1998	1997	1995	1994	1993
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	89%	91%	93%	92%	96%	96%
Very satisfied	50%	61%	63%	66%	58%	71%
Somewhat satisfied	39%	30%	30%	26%	38%	25%
Somewhat dissatisfied	8%	5%	5%	6%	3%	2%
Very dissatisfied	3%	4%	2%	2%	1%	2%

Q6: Thinking about your last bus trip, how satisfied are you with driver friendliness?(Among those with an opinion)

Table 13: Satisfaction with Bus Operators – Helpfulness

Rating	2006	2005	2004	2003	2002	2001
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	90%	93%	93%	94%	94%	92%
Very satisfied	56%	70%	64%	67%	60%	62%
Somewhat satisfied	34%	23%	29%	27%	34%	30%
Somewhat dissatisfied	6%	6%	5%	4%	3%	5%
Very dissatisfied	5%	2%	2%	2%	3%	3%
Rating	1999	1998	1997	1995	1994	1993
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	91%	92%	93%	92%	95%	95%
Very satisfied	50%	63%	66%	66%	62%	74%
Somewhat satisfied	41%	29%	27%	26%	33%	21%
Somewhat dissatisfied	5%	5%	4%	5%	3%	3%
Very dissatisfied	4%	3%	3%	3%	2%	2%

Q6: Thinking about your last bus trip, how satisfied are you with the helpfulness of the driver? (Among those with an opinion)

B. Satisfaction with Buses

Overall satisfaction with buses dropped slightly in 2006 with six out of seven bus riders indicating they were at least somewhat satisfied with the Valley Metro buses (86% “very” + “somewhat satisfied”). In 2005, 91% of the riders indicated they were either “very” or “somewhat satisfied” and in 2004, 93% indicated they were satisfied with the buses.

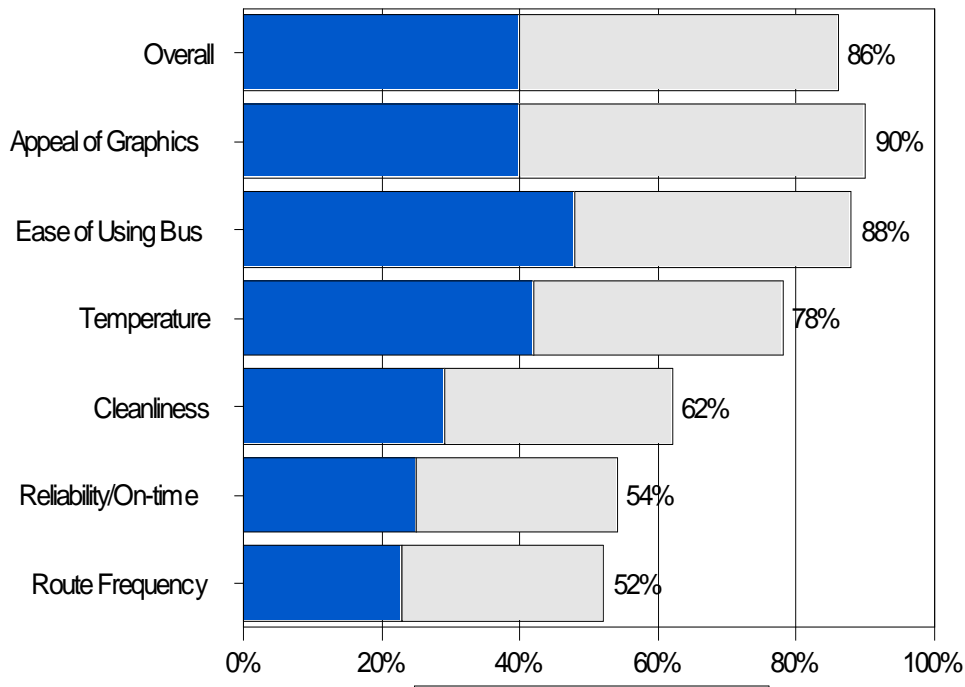
Riders who use the bus fewer than five days a week were significantly more likely than more frequent riders to say they are “very” or “somewhat satisfied” with the buses overall (92% vs. 83% of those who ride five or more days a week) and to rate individual bus attributes in general more highly than those who ride more frequently.

Among the seven specific bus attribute ratings the highest satisfaction levels were given for the appeal of the graphics on the outside of the bus (90%). This was closely followed by ease of using the bus (88%). As has been the trend in the past, the lowest rated of the seven attributes was route frequency (52%).

It should be noted that on-time performance and route frequency experienced significant decreases in satisfaction this year (see Tables 18 and 21). On-time performance dropped from 84% “very” or “somewhat satisfied” in 2006 to 54% satisfied in 2005 and route frequency moved from 78% satisfied to 52% this year.

Satisfaction with Buses - 2006

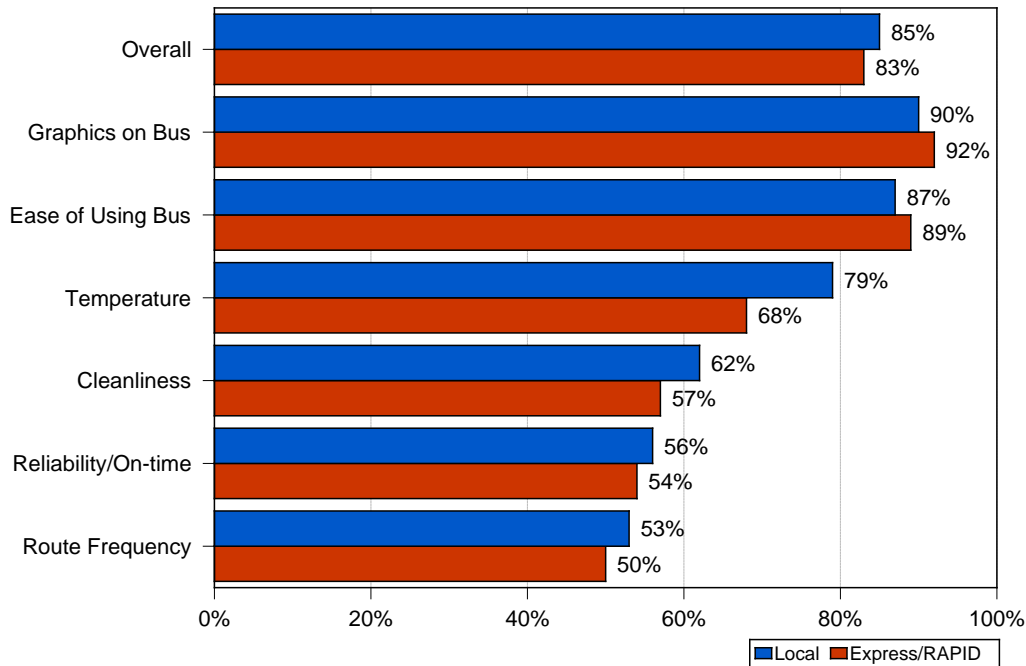
(Very + Somewhat Satisfied)



Overall, satisfaction with the buses among express riders was comparable to ratings given by local riders. However, express riders were slightly less likely to be satisfied with the temperature of the buses (68% vs. 79% among local riders).

Satisfaction with Buses - Local vs. Express/RAPID

(Very + Somewhat Satisfied)



Among those with an opinion.

Riders under the age of 25 were most likely to express dissatisfaction with on-time performance (57% somewhat or very dissatisfied), closely followed by those ages 25 to 54 (52%) and those who ride the bus more than 5 days a week (50% compared to 37% who ride less frequently).

In addition, riders who pay full fare were least satisfied with on-time performance and route frequency (49% and 47% indicating they were “very or “somewhat satisfied,” while riders who use an employee discount were most satisfied with these attributes (74% satisfied for both attributes).

Riders receiving a disability discount were less satisfied than other groups with ease of using the bus, temperature inside the bus, and the bus overall (77%, 73% and 81% respectively) while youth riders were most satisfied with these attributes (93%, 92% and 91%).

Table 14: Satisfaction with Buses – Overall Satisfaction

Rating	2006	2005	2004	2003	2002	2001	1999	1998	1997	1995
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very + Somewhat Sat.	86%	91%	93%	95%	92%	89%	86%	86%	91%	89%
Very satisfied	40%	55%	55%	52%	48%	44%	39%	46%	50%	47%
Somewhat satisfied	46%	36%	38%	43%	44%	45%	47%	40%	41%	42%
Somewhat dissat.	10%	8%	4%	5%	6%	8%	10%	8%	7%	7%
Very dissatisfied	5%	1%	2%	--	2%	3%	4%	6%	2%	4%

Q7: Thinking about your last bus trip, how satisfied are you with the bus overall? (Among those with an opinion)

Table 15: Satisfaction with Buses – Appeal of Graphics on the Bus

Rating	2006	2005	2004	2003	2002	1999	1998
Total	100%	100%	100%	100%	100%	100%	100%
Very + Somewhat	91%	92%	93%	95%	92%	91%	92%
Very satisfied	40%	56%	57%	51%	50%	45%	50%
Somewhat satisfied	51%	36%	36%	44%	42%	46%	42%
Somewhat dissatisfied	4%	6%	6%	4%	6%	6%	5%
Very dissatisfied	6%	3%	1%	1%	2%	3%	3%

Q7: Thinking about your last bus trip, how satisfied are you with the appeal of graphics on the outside of the bus? (Among those with an opinion)

*Note: This question was changed in 2006 to specifically address graphics, previously the question had been asked about the general appearance of the bus.

Table 16: Satisfaction with Buses – Ease of Using the Bus

Rating	2006	2005	2004	2003	2002	1999	1998
Total	100%	100%	100%	100%	100%	100%	100%
Very + Somewhat	89%	91%	92%	89%	92%	85%	81%
Very satisfied	48%	61%	64%	55%	58%	47%	53%
Somewhat satisfied	41%	30%	28%	34%	34%	38%	29%
Somewhat dissatisfied	6%	6%	4%	7%	6%	9%	11%
Very dissatisfied	6%	2%	3%	3%	2%	6%	7%

Q7: Thinking about your last bus trip, how satisfied are you with the ease of using the bus? (Among those with an opinion)

Table 17: Satisfaction with Buses – Route Frequency

Rating	2006	2005	2004	2003	2002	1999	1998
Total	100%	100%	100%	100%	100%	100%	100%
Very + Somewhat	52%	78%	80%	73%	73%	62%	64%
Very satisfied	23%	50%	43%	44%	36%	26%	32%
Somewhat satisfied	29%	28%	37%	29%	37%	36%	32%
Somewhat dissatisfied	30%	14%	12%	17%	15%	21%	18%
Very dissatisfied	17%	8%	8%	10%	12%	17%	18%

Q7: Thinking about your last bus trip, how satisfied are you with route frequency? (Among those with an opinion)

*Question added in 1998

Table 18: Satisfaction with Buses – Temperature

Rating	2006	2005	2004	2003	2002	2001
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	78%	87%	88%	89%	88%	89%
Very satisfied	42%	56%	55%	53%	48%	52%
Somewhat satisfied	36%	31%	33%	36%	40%	37%
Somewhat dissatisfied	18%	10%	9%	9%	7%	8%
Very dissatisfied	5%	3%	3%	2%	5%	3%
Rating	1999	1998	1997	1995	1994	1993
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	86%	84%	87%	89%	85%	89%
Very satisfied	44%	49%	51%	53%	42%	59%
Somewhat satisfied	42%	35%	36%	36%	43%	30%
Somewhat dissatisfied	10%	12%	9%	8%	12%	9%
Very dissatisfied	4%	4%	4%	4%	3%	2%

Q7: Thinking about your last bus trip, how satisfied are you with the temperature inside the bus? (Among those with an opinion)

Table 19: Satisfaction with Buses – Cleanliness

Rating	2006	2005	2004	2003	2002	2001
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	62%	84%	88%	86%	87%	89%
Very satisfied	29%	50%	52%	48%	43%	47%
Somewhat satisfied	33%	34%	36%	38%	44%	42%
Somewhat dissatisfied	26%	12%	8%	10%	9%	8%
Very dissatisfied	12%	4%	4%	4%	4%	3%
Rating	1999	1998	1997	1995	1994	1993
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	87%	83%	89%	92%	90%	93%
Very satisfied	47%	47%	52%	52%	53%	61%
Somewhat satisfied	40%	36%	37%	40%	37%	32%
Somewhat dissatisfied	9%	11%	8%	5%	9%	6%
Very dissatisfied	4%	6%	3%	3%	1%	1%

Q7: Thinking about your last bus trip, how satisfied are you with cleanliness of the bus? (Among those with an opinion)

Table 20: Satisfaction with Buses –On-Time Performance

Rating	2006	2005	2004	2003	2002	2001
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	54%	84%	77%	82%	79%	82%
Very satisfied	25%	52%	48%	52%	43%	46%
Somewhat satisfied	29%	32%	29%	30%	36%	36%
Somewhat dissatisfied	30%	10%	16%	11%	12%	12%
Very dissatisfied	16%	7%	7%	7%	9%	6%
Rating	1999	1998	1997	1995	1994	1993
Total	100%	100%	100%	100%	100%	100%
Very + Somewhat	69%	73%	81%	82%	79%	87%
Very satisfied	38%	42%	47%	47%	43%	54%
Somewhat satisfied	31%	31%	34%	35%	36%	33%
Somewhat dissatisfied	21%	12%	11%	11%	15%	8%
Very dissatisfied	10%	15%	8%	7%	6%	5%

Q7: Thinking about your last bus trip, how satisfied are you with on-time performance? (Among those with an opinion)

C. Overall Satisfaction with Bus Service in the Valley

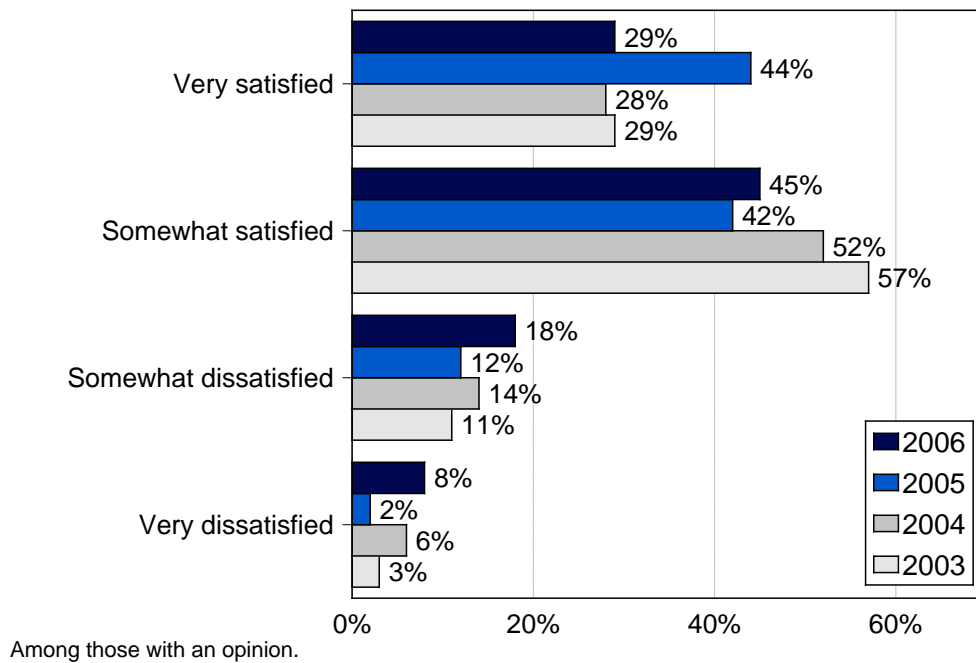
Roughly three out of four riders indicated they are satisfied with bus service in the Valley overall (74%). However, after a high of 44% of the riders stating that they were “very satisfied” with the service in 2005, percentages this year are more in line with previous tracking data. Currently 29% of all riders indicated they were “very satisfied” with the bus service.

Riders most likely to be satisfied are:

- Those who pay a youth fare (86% “very” + “somewhat satisfied”)
- Less frequent riders - those utilizing the bus service less than 5 days a week (84% “very” + “somewhat satisfied”)
- Riders who use the bus service for destinations other than work (80% “very” + “somewhat satisfied”)

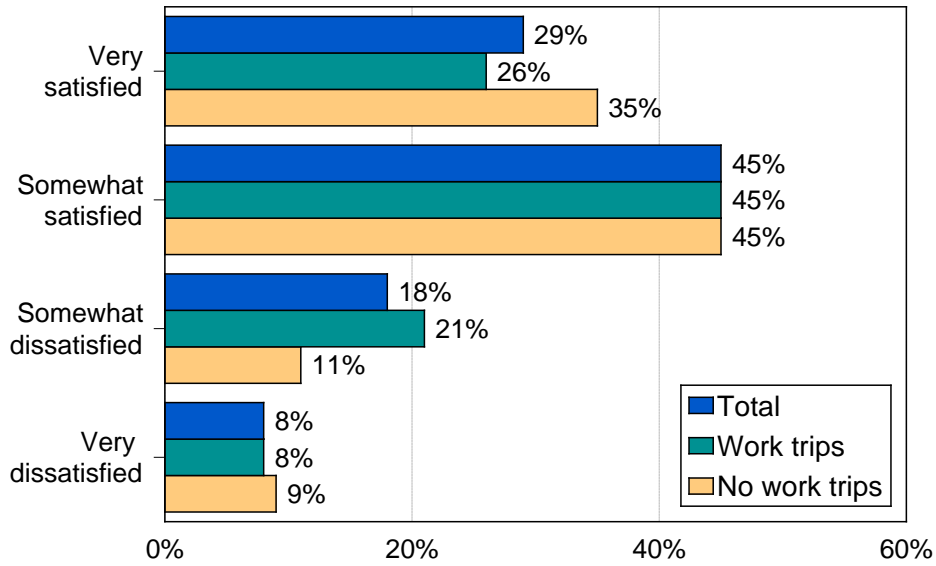
Overall Satisfaction with Valley Bus Service

In general, how would you rate your overall satisfaction with the bus service in the Valley? Are you...



Overall Satisfaction with Valley Bus Service

Use bus for work trips vs. No work trips



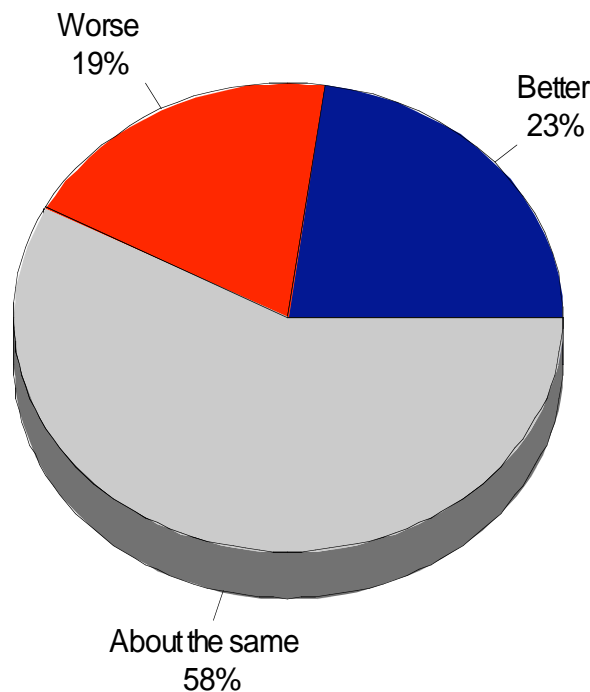
*In general, how would you rate your overall satisfaction with the bus service in the Valley?
Are you... (Among those with an opinion)*

D. Opinion of Transit in the Last Year (Telephone only)

Most bus riders surveyed via the telephone feel the quality of bus transit service in the Valley has remained about the same this year as compared to last year (58%). Nearly one in four indicated bus transit service has improved this year (23%), compared to 19% who felt that service was worse. Frequent riders were more likely than infrequent riders to indicate they feel transit service is worse than it was one year ago (24% vs. 10%).

Changing Perceptions of Transit Service

Overall, would you say bus transit service in the area is better, worse, or about the same as it was one year ago?



1. Better than last year

Approximately one in four of the 39 riders who indicated they thought bus service was better this year attributed it to the increased frequency of buses (26%), while one in six indicated it was an increase in the number of routes offered (17%). Other top reasons mentioned include 10% who felt that the buses were more reliable and on time, 8% who cited safer driving habits, and 7% who appreciated having bus service on Sunday. New (5%) or cleaner buses (5%) were also cited by an additional 10% and 6% of riders felt that buses were not breaking down as much as they were a year ago.

Table 21: Why Bus Service is Better
(Among those who indicated service has been better this year)

Reason	2006 (n=39)
More frequent buses	26%
More routes	17%
More reliable/on time	10%
Safer driving	8%
Sunday service	7%
Buses not breaking down as much	6%
Cleaner buses	5%
New buses	5%
Other	36%
Don't know	8%

Q9a: What about the bus transit service makes it better than it was last year?

2. *Worse than last year*

Four reasons were most commonly cited by riders surveyed who indicated that bus service was worse this year than last year (n=33); all were mentioned by an average of one out of every four riders – unreliable service (26%), rude or uncaring bus drivers (24%), crowded buses (22%) and buses that were not frequent enough (21%).

Other mentions included construction (17%), buses failing to stop at bus stops (10%) and problems transferring or making connecting buses (9%). Dissatisfaction with the amount of bus service was mentioned by an additional 12% of the riders (lack of routes – 6%; no 24-hour service – 6%).

Table 22: Why Bus Service is Worse
(Among those who indicated service has been worse this year)

Reason	2006 (n=33)
Unreliable – not on time (late/early)	26%
Bus drivers (rude/don't care)	24%
Buses too crowded	22%
Not frequent enough	21%
Construction	17%
Bus doesn't stop/passes stop	10%
Problems transferring/connecting	9%
Need more bus routes	6%
Don't have 24-hour service	6%
Other	20%
Don't know	6%

Q9b: What about the bus transit service makes it worse than it was last year?

E. Likelihood to Recommend

This year a likelihood-to-recommend question was added to the rider satisfaction survey. The reason for the addition is to provide Valley Metro with a measure that is being used nationally to evaluate customer loyalty - the Net Promoter Score (NPS). A brief description of the NPS follows.

Net-Promoter Score¹

Net Promoter Score = % Promoters (% giving 9+10 rating) - % Detractors (% giving 0-6 rating)

The Net-Promoter figure is calculated by subtracting the percentage of people who say they are unlikely to make a recommendation from the percentage of people who say they are extremely likely to do so.

Reason: The Net-Promoter score is a strong indicator of profitable growth. We take the difference, because we want the Net effect of the behavior of the entire group.

Example 1: Of 100 people surveyed, there are 60 promoters (9-10), 30 neutral (7-8), and 10 detractors (0-6). Your Net-Promoter score = 60% - 10% = 50%

Example 2: Of 100 people surveyed, there are 40 promoters, 19 neutral, and 41 detractors. Your Net-Promoter score = 40% - 41% = -1%

Two in seven riders indicated they were “very likely,” to recommend bus service in the Valley to a friend or family member by ranking it a 9 or 10 (28%; see Table 6) and the percentage of those unlikely to strongly recommend the service (i.e., the detractors) was 44%. This leads to a NPS of -16% (28% - 44%) for Valley Metro bus service among its riders. The average likelihood to recommend the bus overall was 6.3 on a 10-point scale. Express riders had a higher NPS than local riders (+17% vs. -21%). In addition, riders who receive a disability discount had the lowest NPS (-31%), whereas those paying a senior fare had the highest NPS (+12%).

¹ Reichheld, Fred. The Ultimate Question. Harvard Business School Press, Boston Massachusetts, 2006.

Table 23: Likelihood to Recommend Bus

	2006 (n=544)	Local only (n=440)	Express only (n=29)
Net Promoter Score	-16%	-21%	+17%
NET 9/10 (Promoters)	28%	25%	43%
NET 7/8 (Neutral)	27%	27%	31%
NET 0-6 (Detractors)	45%	46%	26%
10 – Very Likely	19%	17%	39%
9	9%	9%	4%
8	14%	14%	20%
7	13%	13%	11%
6	8%	8%	6%
5	12%	13%	10%
4	6%	7%	3%
3	5%	5%	3%
2	4%	3%	-
1	2%	2%	3%
0 – Not at all Likely	7%	8%	-

Q10: How likely would you be to recommend the bus service in the area to a friend or family member?

F. Helpfulness of Phone Employees

Slightly more than four in five riders indicated they have called 602-253-5000 for bus information (83%). Of those bus riders who call the telephone bus information line, the majority appear to be generally satisfied with the helpfulness of the operators, however, the percentage of riders rating the helpfulness of the telephone employees as “very good” declined significantly compared to the previous four years of tracking data. Currently, three in eight of those who call the bus information telephone line indicate the helpfulness of the telephone employees is “very good” (46% compared to 54% to 66% from 2002 to 2005). An additional 32% say the telephone employees do a “good” job.

Older residents were more likely than younger residents to give a “very good” rating for the helpfulness of the telephone service representatives (55% vs. 39%).

Table 24: Helpfulness of Telephone Employees

Rating	2006	2005	2004	2003	2002	2001
Very + Good	78%	87%	75%	90%	89%	78%
Very good	46	60%	54%	61%	66%	43%
Good	32	27%	21%	29%	23%	35%
Fair	14	10%	10%	7%	7%	17%
Poor	4	3%	7%	1%	2%	3%
Very Poor	4	1%	8%	2%	2%	2%
Rating	1999	1998	1997	1995	1994	1993
Very + Good	82%	83%	85%	74%	83%	87%
Very good	46%	62%	61%	42%	56%	67%
Good	36%	21%	24%	32%	27%	20%
Fair	10%	12%	10%	17%	7%	9%
Poor	6%	2%	2%	5%	5%	2%
Very Poor	2%	3%	3%	4%	5%	2%

Q15: How would you rate the helpfulness of the employees when you call 602-253-5000 for bus information? (Among those who call.)

V. Route Information and Assistance

A. Preferred Source for Bus Information

Bus riders most frequently indicated that their preferred source for information about the bus system was the Bus Book (mentioned by 66%). Almost as popular, however, was calling Valley Metro directly (54%). Providing information at bus shelters and on the Internet through Valley Metro's web site rounded at the most frequently mentioned sources (19% and 13%, respectively).

In addition to using the Bus Book, frequent riders, riders ages 25 to 54, and riders who use the bus to get to work were more likely than those in the comparative groups to indicate they will call Valley Metro (61% of those who ride 5+ days/week, 68% of those ages 25 to 54, and 60% of those who ride the bus to work) or look at the bus stops/shelter for information about the bus system (22% of frequent riders, 33% of those ages 25 to 54, and 24% who ride the bus to work).

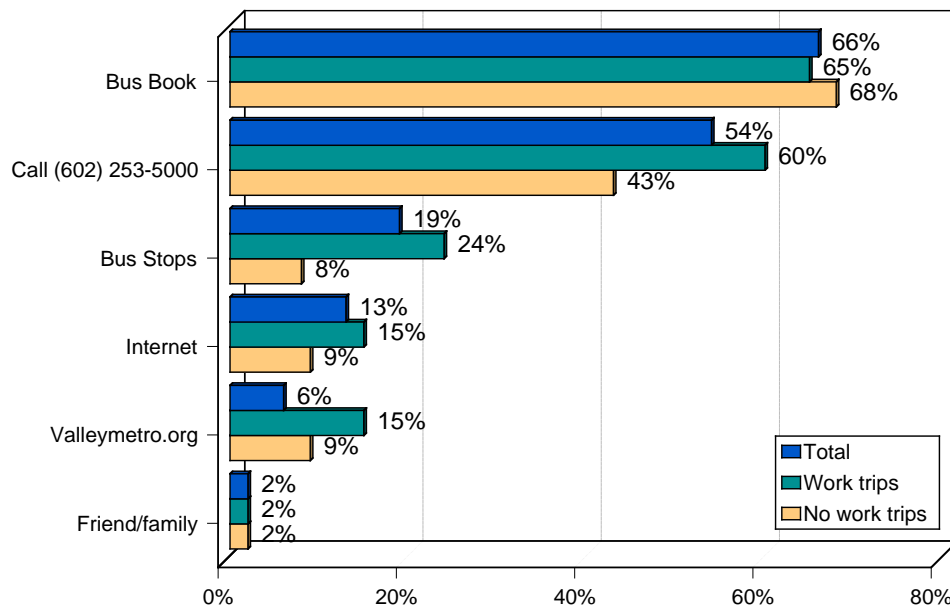
Table 25: Preferred Source for Bus Information

Information Sources	2006
Bus Book	66%
Call Valley Metro	54%
At bus stops/shelters	19%
NET Internet/Vallymetro.org	13%
Internet	13%
Valleymetro.org	6%
Friends/family	2%
Other	2%
Don't know/na	3%

Q14: What is your preferred source of information about the bus system? Where else do you turn for information about the bus system?

Preferred Source of Bus Information

Use bus for work trips vs. No work trips

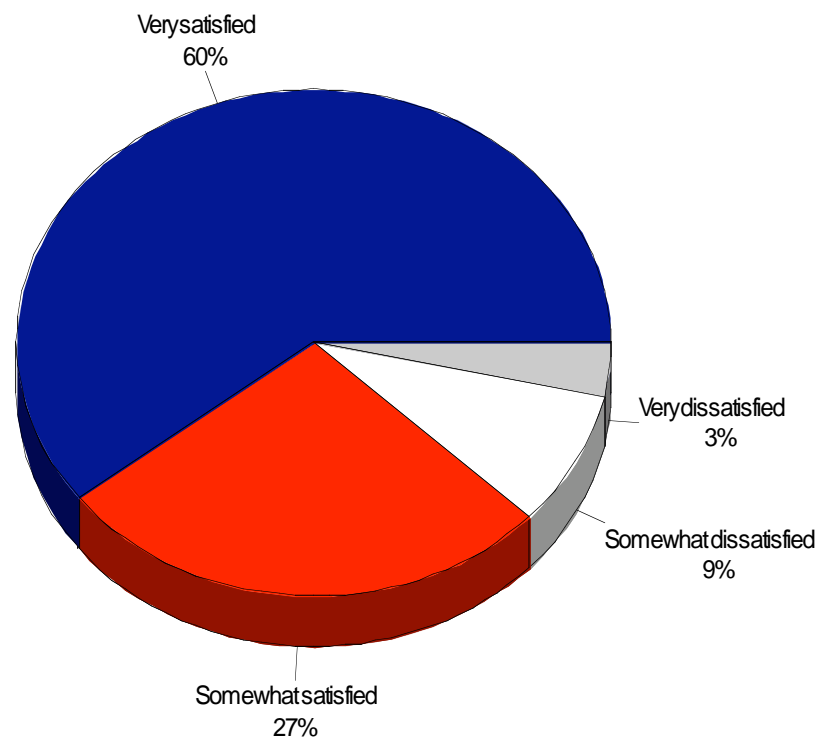


B. Bus Book Feedback – Telephone only**1. Satisfaction**

The vast majority of bus riders report they are at least somewhat satisfied with the current Bus Book (87%), with three in five (60%) stating they are “very satisfied” with the Bus Book. Older riders were significantly more likely than younger riders to indicate they are “very satisfied” with the Bus Book (68% vs. 49%).

Satisfaction with the Bus Book

Overall, how satisfied are you with the current Bus Book?



2. Alternatives

Assuming that the Bus Book was not available, three out of five riders indicated that they are most likely to call Valley Metro for route and schedule information (82%). Two-thirds indicated they are likely to reference postings located at the bus stops (66%) while more than half stated they would refer to other printed maps or schedules (59%) or call for automated trip planning (62%). Slightly fewer than half of the riders indicated they would be most likely to go to Valley Metro's web site (46%).

Table 26: Likelihood to Use Bus Book Alternatives

Information Sources (n=185)	Very Likely	Somewhat Likely	Not Very Likely	Not at all Likely
Calling 602-253-5000	61%	21%	10%	8%
Postings at bus stops	41%	25%	10%	25%
Individually printed maps/ schedules	36%	23%	15%	27%
Calling for automated trip planning	35%	27%	14%	24%
Valley Metro web site	35%	11%	11%	42%

Q17: How likely would you be to turn to each of the following sources for information about routes and schedules if you did not have access to a Bus Book? For each source please indicate if you are very likely, somewhat likely, not very likely or not at all likely to use that source for bus route and schedule information instead of the Bus Book.

Those most likely to call Valley Metro's (602) 253-5000 number are riders who receive a disability discount (94% "very" + "somewhat likely").

Those most likely to reference postings located at bus stops are riders who pay using an employee discount (84% "very" + "somewhat likely").

Those most likely to utilize automated trip planning:

- Riders who pay using an employee discount (78% "very" + "somewhat likely")
- Riders younger than 55 years old (68% "very" + "somewhat likely")
- Riders who use the bus to get to work (68% "very" + somewhat likely)

Those most likely to reference Valley Metro's website:

- Riders who pay using an employee discount (68% "very" + "somewhat likely")
- Caucasian riders (50% "very" + "somewhat likely")

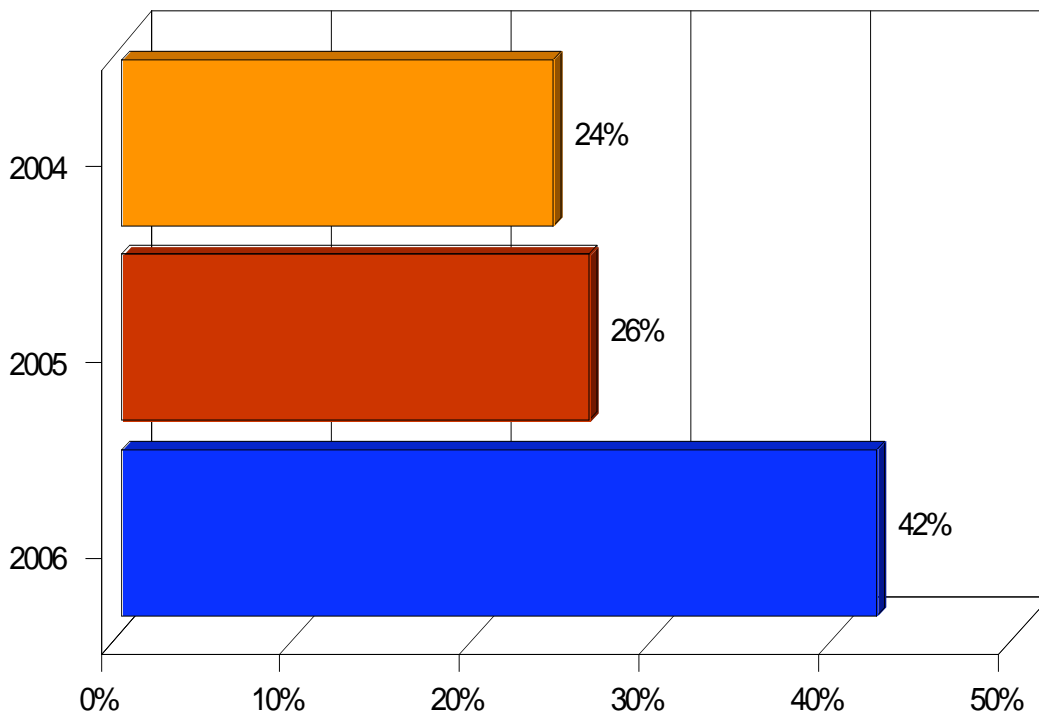
C. Online Trip Planner

1. Awareness

Almost three out of seven bus riders indicated they are aware that Valley Metro offers an online trip planner on their web site (42%). This is a significant increase from previous years when only 26% said they were aware of the service in 2005, and 24% were familiar with it in 2004.

Riders most likely to be aware of the online trip planner were riders who utilize an employee discount (67%) and Caucasians (47% compared to 36% for all others), as well as riders under the age of 55 (50% compared to 37% for those older), and those who use the bus to go to work (48% compared to 31% of those who do not ride the bus to work).

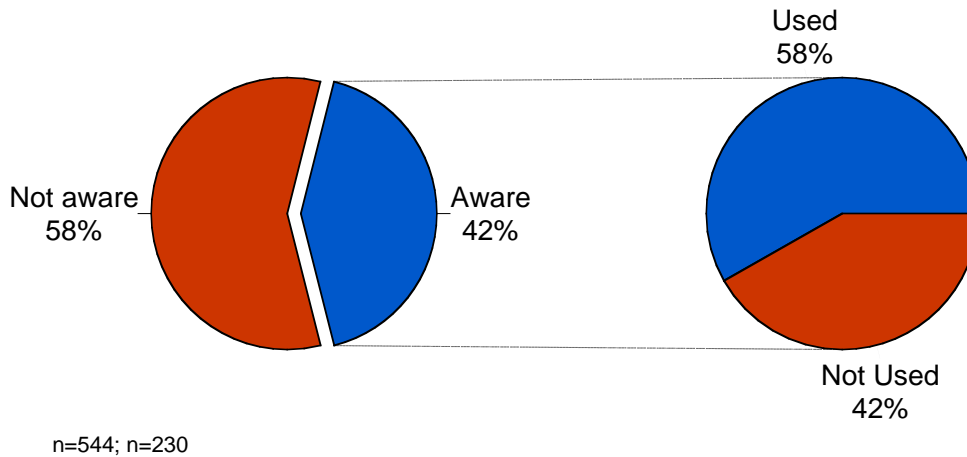
Awareness of On-line Trip Planner



Among those aware of the online trip planner, more than half (58%) report having used it (24% of the total sample). This is a significant increase from the previous year when 32% of those aware reported using it (or 8% of all riders). Riders who have used the online trip planner (n=132) were then asked how easy it was to use.

Awareness and Usage of Online Trip Planner

To the best of your knowledge, does the Valley Metro web site offer an on-line trip planner? If Yes: Have you personally ever used the on-line trip planner offered on the Valley Metro web site?

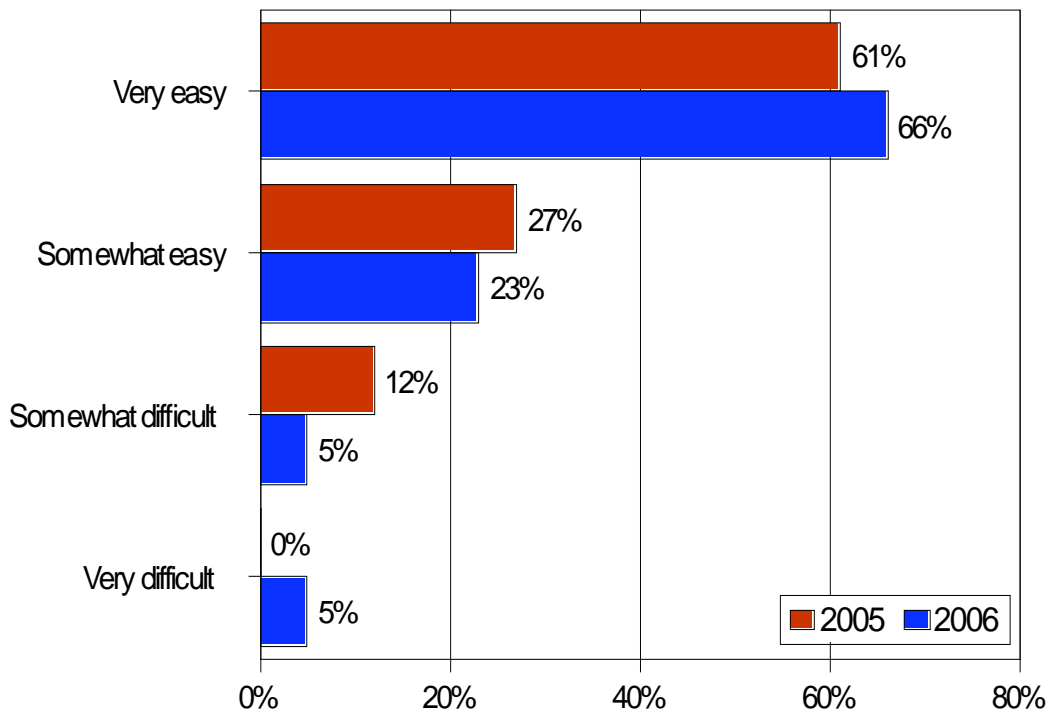


2. *Ease of Use*

Nearly nine in ten of the riders who have used the on-line trip planner say it was at least “somewhat easy” to navigate through the process (89%). A majority, or 66%, said the online trip planner was “very easy” to use; this is up slightly from 2005 (61%). An additional 23% found the service “somewhat easy” to use. Only 13 people, or 10%, said it was “somewhat” or “very difficult.”

Ease of Using Trip Planner

How easy to use is the on-line trip planner?



D. Internet Access

Two-thirds of the riders indicated they currently have access to the Internet (66%).

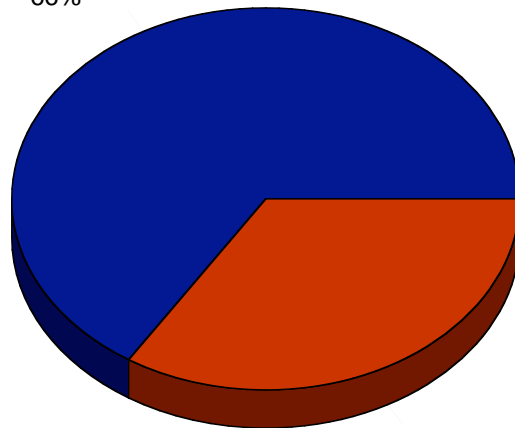
Riders most likely to have Internet access are:

- Bus riders younger than 55 (72% compared to 50% for those older)
- Riders who pay using an employee discount (75%)
- Riders who pay a youth fare/pass (74%)
- Caucasians (70% versus 59% for non-Caucasian riders)
- Riders who use the bus to get to work (70% compared to 56% for riders who use the bus primarily for other destinations).

Access to the Internet

Do you have access to the internet?

Have access
66%



No access
34%

n=544

Appendix A

**Rider Satisfaction Survey 2006
Telephone Portion**

Good _____, this is _____ calling for WestGroup Research in Phoenix on behalf of Valley Metro. We are conducting a study about the bus service in the Valley. Could I please speak with the youngest person age 14 or older in your household who currently rides the city bus? We are asking only for your opinion and are not selling anything.

N=160

B. Male/Female = 50%/50%

SCRA. Do you currently use the bus as a means of transportation?

YES -- CONTINUE

No/DK -- Thank and Terminate

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

SCRC. What city do you live in?

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

1. On average, how many days a week do you ride the bus?
- 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 days
 - h. 7 days
 - i. DK
 - j. No answer

1. Would you say you are riding the bus more often, less often, or the same as you were one year ago?
 - a. More often
 - b. Less often
 - c. The same
 - d. Don't know/refused

3. Do you typically ride a local bus or an express bus when you ride?
 - a. Local ONLY
 - b. Express/Rapid ONLY
 - c. Combination

4. In general, where do you go using public transit? DO NOT READ LIST. PROBE: Where else? MULTIPLE RESPONSES ALLOWED
 - a. To or from work
 - b. To or from school
 - c. To or from shopping
 - e. To or from social or recreational events
 - f. To or from medical appointments
 - g. To or from sporting events
 - h. To or from the airport
 - i. Other purposes: SPECIFY: _____
 - j. DK/No answer

5. What is the main reason you ride the bus? (DO NOT READ LIST)
 - a. convenient
 - b. don't have a car
 - c. don't have a driver's license
 - d. enjoy the people
 - e. protects the environment
 - f. saves money
 - g. saves wear and tear on my car
 - h. Other (SPECIFY: _____)
 - i. Don't know/no answer

6. Thinking about the last bus trip you made, how satisfied are you with: ROTATE a-c ALWAYS ASK "d" LAST

	Very satis	Somewhat satis	Somewhat dissatis	Very dissatis	DK	No answer
a. Driver's safe driving	1	2	3	4	5	6
b. Driver friendliness	1	2	3	4	5	6
c. Helpfulness of the driver	1	2	3	4	5	6
d. Driver overall	1	2	3	4	5	6

7. Again, thinking about the last bus trip you made, how satisfied are you with: ROTATE a-g, ALWAYS ASK “g” LAST

	Very satis	Somewhat satis	Somewhat dissatis	Very dissatis	DK	No answer
a. Interior cleanliness of the bus	1	2	3	4	5	6
b. On-time performance	1	2	3	4	5	6
c. Temperature inside the bus	1	2	3	4	5	6
d. Route frequency	1	2	3	4	5	6
e. Appeal of graphics on outside of bus	1	2	3	4	5	6
f. Ease of using the bus	1	2	3	4	5	6
g. Bus overall	1	2	3	4	5	6

- 8 In general, how would you rate your overall satisfaction with the bus service in the Valley? Are you...
- a. Very satisfied
 - b. Somewhat satisfied
 - c. Somewhat dissatisfied
 - d. Very dissatisfied
 - e. DK/No answer

9. Overall, would you say bus transit service in the area is better, worse, or about the same as it was one year ago?
- a. Better
 - b. Worse
 - c. About the same
 - d. Don't know.No answer

9a. If Better: What about bus transit service makes it better than it was last year?

9b. If Worse: What about bus transit service makes it worse than it was last year?

10. How likely would you be to recommend the bus service in the area to a friend or family member? Please use a 0 to 10 scale where 0 means not at all likely and a 10 means very likely.
 Not at all likely 0 1 2 3 4 5 6 7 8 9 10 Very likely 11=don't know

11. Again, thinking about the last trip you made on the bus, using a scale from 1 to 4 where one means “very safe” and four means “not at all safe,” please rate how safe you felt while waiting at the bus stop for the last bus trip you made.
- Very safe 1 2 3 4 Not at all safe 5 DK 6. NA

- 11a. IF “3” or “4” in Q10:What is the location of the bus stop? GET NEAREST CROSS STREETS

12. Using the same one to four scale where one means “very safe” and four means “not at all safe”, please rate how safe you felt the last time you rode the bus?
- Very safe 1 2 3 4 Not at all safe 5 DK 6. NA
13. One last time, in thinking about the last bus trip you made, was a vehicle available for you, either as a passenger or driver, to make that trip?
- Yes
 - No
 - DK
 - NA
14. What is your preferred source for information about the bus system? DO NOT READ LIST, Where else do you turn for information about the bus system? CAPTURE FIRST AND SECOND RESPONSE SEPARATELY.
- Call 602-253-5000
 - Schedules at bus stops/shelters
 - Bus Book
 - Individual schedules
 - Internet – PROBE FOR NAME OF WEB SITE
 - Kiosks
 - Friends/family member
 - Other riders
 - Other: SPECIFY _____
 - DK/No answer
15. How would you rate the helpfulness of the employees when you call 602-253-5000, Valley Metro’s customer service number, for bus information?
- Very good
 - Good
 - Fair
 - Poor
 - Very Poor
 - DON’T READ: Try, but can’t get through
 - DON’T READ: Don’t call
 - No answer
16. Overall, how satisfied are you with the current Bus Book? Are you very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?
- Very satisfied
 - Somewhat satisfied
 - Not very satisfied
 - Not at all satisfied
 - Don’t know
 - Don’t use Bus Book

17. How likely would you be to turn to each of the following sources for information about routes and schedules if you did not have access to a Bus Book? For each source please indicate if you are very likely, somewhat likely, not very likely or not at all likely to use that source for bus route and schedule information instead of the Bus Book?
ROTATE AND READ LIST
- Valley Metro web site
 - Maps and schedules posted at the bus stops
 - Calling the Valley Metro customer service line – 602-253-5000
 - Calling a phone number for automated trip planning information
 - Individually printed route maps and schedules
18. To the best of your knowledge, does the Valley Metro web site offer an on-line trip planner?
- Yes
 - No
 - DK
- 18a. IF YES: Have you personally ever used the on-line trip planner offered on the Valley Metro web site?
Yes/No/DK
- 18b. IF YES IN Q18a: How easy to use is the on-line trip planner? Would you say it is...
READ LIST:
- Very easy
 - Somewhat easy
 - Somewhat difficult
 - Very difficult
 - DO NOT READ: Don't know
19. Which fare do you pay? DO NOT READ
- Full
 - Senior
 - Disabled
 - Youth
 - Discounted bus card through employer
 - No answer
20. What do you typically use to pay when you take the bus? DO NOT READ LIST.
MULTIPLE RESPONSES ALLOWED
- Cash
 - Monthly pass/
 - Token
 - Bus Card Plus
 - All day pass
 - Ticket/10-ride booklet
 - Free fare
 - College pass/Semester pass
 - DK/NA

21. How long have you been using the bus as a means of transportation in Metro-Phoenix?
- 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

DEMOGRAPHICS

22. What city do you travel around most often using the bus? Next? IF R SAYS MULTIPLE CITIES GET FIRST AND SECOND MENTION.
- a. Phoenix
 - b. Scottsdale
 - c. Tempe
 - d. Mesa
 - e. Chandler
 - f. Glendale
 - g. Gilbert
 - h. Peoria
 - i. Avondale
 - j. Guadalupe
 - k. Other (SPECIFY: _____)
 - l. Refused/NA
23. What is your age? _____
IF Refused: Ask:
Would you be willing to tell me if you are you.. READ LIST
- a. Under the age of 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. Including yourself, how many people live in your household? _____
25. Do you have access to the Internet?
- a. Yes
 - b. No
 - c. Don't know

26. What languages are spoken in your home? CLARIFY – DO NOT READ LIST
UNLESS NECESSARY
1. English only
 2. English and Spanish
 3. Spanish only
 4. English and some other language – SPECIFY:
 5. Some other language only – SPECIFY:
 6. Don't know/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. 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. Over \$60,000
 - g. DK
 - h. NA/REF
29. RECORD GENDER: MALE FEMALE

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

**Rider Satisfaction Survey 2006
Intercept Portion**

Hi – I am ____ from WestGroup Research. We are conducting a study on behalf of Valley Metro about the bus service in the Valley. Do you have a couple of minutes? We are asking only for your opinion and are not selling anything.

N=240

C. Male/Female = 50%/50%

D. Quota per location = 20

SCRA. Do you currently use the bus as a means of transportation?

YES -- CONTINUE

No/DK -- Thank and Terminate

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

SCRC. What city do you live in?

a. Phoenix

b. Scottsdale

c. Tempe

d. Mesa

e. Chandler

e. Glendale

f. Gilbert

g. Peoria

h. Avondale

j. Guadalupe

k. Other (SPECIFY: _____)

h. Refused/NA

1. On average, how many days a week do you ride the bus?

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 days

h. 7 days

i. DK

j. No answer

2. Would you say you are riding the bus more often, less often, or the same as you were one year ago?

e. More often

f. Less often

g. The same

h. Don't know/refused

3. Do you typically ride a local bus or an express bus when you ride?

- d. Local ONLY b. Express/Rapid ONLY c. Combination

4. In general, where do you go using public transit? DO NOT READ LIST. PROBE: Where else? MULTIPLE RESPONSES ALLOWED

- a. To or from work
- b. To or from school
- c. To or from shopping
- e. To or from social or recreational events
- f. To or from medical appointments
- g. To or from sporting events
- h. To or from the airport
- i. Other purposes: SPECIFY: _____
- j. DK/No answer

6. Thinking about the last bus trip you made, how satisfied are you with: ROTATE a-c ALWAYS ASK “d” LAST

	Very satis	Somewhat satis	Somewhat dissatis	Very dissatis	DK	No answer
a. Driver’s safe driving	1	2	3	4	5	6
b. Driver friendliness	1	2	3	4	5	6
c. Helpfulness of the driver	1	2	3	4	5	6
d. Driver overall	1	2	3	4	5	6

7. Again, thinking about the last bus trip you made, how satisfied are you with: ROTATE a-g, ALWAYS ASK “h” LAST

	Very satis	Somewhat satis	Somewhat dissatis	Very dissatis	DK	No answer
a. Internal cleanliness of the bus	1	2	3	4	5	6
b. On-time performance	1	2	3	4	5	6
c. Temperature inside the bus	1	2	3	4	5	6
d. Route frequency	1	2	3	4	5	6
e. Appeal of graphics on outside of the bus	1	2	3	4	5	6
f. Ease of using the bus	1	2	3	4	5	6
g. Bus overall	1	2	3	4	5	6

8. In general, how would you rate your overall satisfaction with the bus service in the Valley? Are you...

- f. Very satisfied
- g. Somewhat satisfied
- h. Somewhat dissatisfied
- i. Very dissatisfied
- j. DK
- k. No answer

10. How likely would you be to recommend the bus service in the area to a friend or family member? Please use a 0 to 10 scale where 0 means not at all likely and a 10 means very likely. Not at all likely 0 1 2 3 4 5 6 7 8 9 10 Very likely 11=don't know
13. One last time, in thinking about the last bus trip you made, was a vehicle available for you, either as a passenger or driver, to make the trip?
- Yes
 - No
 - DK
 - NA
14. What is your preferred source for information about the bus system? DO NOT READ LIST, Where else do you turn for information about the bus system? CAPTURE FIRST AND SECOND RESPONSE SEPARATELY.
- Call 602-253-5000
 - Schedules at bus stops/shelters
 - Bus Book
 - Individual schedules
 - Internet – PROBE FOR NAME OF WEB SITE
 - Kiosks
 - Friends/family member
 - Other riders
 - Other: SPECIFY _____
 - DK/No answer
15. How would you rate the helpfulness of the employees when you call 602-253-5000, Valley Metro's customer service number, for bus information?
- Very good
 - Good
 - Fair
 - Poor
 - Very Poor
 - DON'T READ: Try, but can't get through
 - DON'T READ: Don't call
 - No answer
- 18a. Have you personally ever used the on-line trip planner offered on the Valley Metro web site? Yes/No/DK
- 18b. IF YES IN Q18a: How easy to use is the on-line trip planner? Would you say it is... READ LIST:
- Very easy
 - Somewhat easy
 - Somewhat difficult
 - Very difficult
 - DO NOT READ: Don't know

19. Which fare do you pay?
- i. Full
 - j. Senior
 - k. Disabled
 - l. Youth
 - m. No answer
20. What do you typically use to pay when you take the bus? DO NOT READ LIST. MULTIPLE RESPONSES ALLOWED
- a) Cash
 - b) Monthly pass
 - c) Token
 - d) Bus Card Plus
 - e) All day pass
 - f) Ticket/10-ride booklet
 - g) Free fare
 - h) College pass
 - i) Semester pass
 - j) DK/NA
21. How long have you been using the bus as a means of transportation in Metro-Phoenix?
- i. Less than 6 months
 - j. 6 months to 1 year
 - k. 1 to 2 years
 - l. 3 to 5 years
 - m. 6 to 10 years
 - n. 11 to 20 years
 - o. More than 20 years
 - p. Don't know/NA

DEMOGRAPHICS

23. What is your age? _____
- a. Under the age of 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. Including yourself, how many people live in your household? _____
25. Do you have access to the Internet?
- a. Yes
 - b. No
 - c. Don't know

26. What languages are spoken in your home? CLARIFY – DO NOT READ LIST UNLESS NECESSARY
1. English only
 2. English and Spanish
 3. Spanish only
 4. English and some other language – SPECIFY:
 5. Some other language only – SPECIFY:
 6. Don't know/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. 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. Over \$60,000
 - h. DK
 - h. NA/REF
29. RECORD GENDER: Male / Female
30. RECORD LOCATION
- a. Loloma Station – Scottsdale (Marshall Way between 1st and 2nd Streets)
 - b. Metro Center
 - c. Sunnyslope Station (3rd Street and Dunlap)
 - d. Central Station
 - e. College Avenue between University and 5th Street in Tempe
 - f. Desert Sky Mall Transit Center (75th Ave. and Thomas)
 - g. Ed Pastor Transit Center (Broadway and Central)
 - h. NW Corner Central and 1st Ave. INTERVIEW AT STOP ON 1st Ave
 - i. North side of VanBuren between Central and 1st Avenue
 - j. Chandler Fashion Center (South side of mall by movie theaters)
 - k. Paradise Valley Transit Center (Tatum and Paradise Village Parkway)
 - l. Superstition Springs Center (SE side of Mall)

That completes the survey. Thank you very much for your cooperation.

Valley Metro frequently conducts research with bus riders. If you are interested in participating in more studies, Could I please have your phone number and name or initials so we can contact you in the future?

Name _____

Phone number: _____