Annual Market Survey 2007

Prepared For:

Valley Metro

www.westgroupresearch.com

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Executive Summary

Valley Metro commissioned WestGroup Research of Phoenix to conduct a telephone survey of residents in Maricopa County. The purpose of the survey was to measure awareness and attitudes residents have regarding the various transportation options offered by Valley Metro. This study also provides tracking data for comparison to the Regional Market studies conducted in 2003, 2005, and 2006. A total of 502, 12-minute surveys were completed with Maricopa County residents during November 2007. The margin of error for the total sample is ±4.4 at a 95% confidence level.

System Awareness & Image

- When asked, unaided, to recall the name of the Valley's transit system, almost one in six residents (17%) were able to do so correctly (i.e., specifically said "Valley Metro –16% or "Rapid" – 1%).

- Other names mentioned for the transit system were Metro (12%; 9% in 2006), Phoenix Transit (5%; 3% in 2006), Phoenix bus/City of Phoenix (3%; 2% in 2006), city bus/bus (3%; 3% in 2006), and Valley Transit (1%).

- Aided awareness of Valley Metro experienced a significant increase this year (57% up from 48% in 2006). The combined unaided and aided awareness results (total awareness) reflect this shift with overall awareness increasing to almost three out of four residents (74%, up from 67% in 2006).

- Almost three out of five of residents indicated their impressions of Valley Metro were "somewhat" or "very" favorable (58%), this is up five points from 2006 (53%).

- Overall, the percentage of residents giving words that reflect a positive image of Valley Metro held steady in 2007 (37% vs. 36% in 2006). The most frequently mentioned positive images are that is service is "good" (9%), "on time/reliable" (8%), "adequate" (7%), convenient (6%), and available/accessible (3%).

- Residents are most likely to be able to report that Valley Metro provides local bus service (75%), the future light rail service (15%), and Dial-a-ride services (14%).

- In addition to measuring unaided awareness of the Valley Metro services, aided awareness of each service was also assessed. As seen in previous years, awareness is highest for local bus service (91%), light rail service (80%), dial-a-ride service (71%), and RAPID/express bus service (65%).

- Residents were provided with factual statements about Valley Metro's services and asked if that information had any impact on their perceptions of the organization. Overall, all three statements were well received (60% to 80% reacting positively), with the buses use of environmentally friendly fuels having the strongest positive impact (80% indicating a positive impact on their perception of Valley Metro).

Advertising & News Story Awareness

- Awareness of advertising for Valley Metro jumped substantially in 2007. Currently, two in five residents (41% compared to 30% in 2006) reported seeing or hearing advertising (not news stories) for Valley Metro.

- As found in previous years, residents are most likely to report seeing Valley Metro advertising on television (41%), in print ads (21%), and on the buses (18%).

- Approximately three in five residents aware of the advertising were able to recall a specific advertising message, however, it appears that residents were still confusing advertising with news stories, considering that light rail was the most commonly recalled "advertising" message (mentioned by 13%). The other commonly recalled messages were to carpool (12%) and ride the bus (9%).

- Awareness of news stories about Valley Metro exceeded awareness of advertising for Valley Metro (47% compared to 41%), with news regarding the new light rail system dominating (mentioned by 79%).

- Residents were almost four times more likely to indicate that news stories and advertising had a positive impact on their impressions of Valley Metro than a negative impact (30% vs. 8%).

- Combined advertising and news story awareness for Valley Metro also showed a significant increase in 2007, with two out of three residents reported seeing or hearing about the organization (67%) from one or both of these sources – the highest level observed in the last four years.

- As in the past, reducing air pollution (selected by 28%) and saving money on gas (25%) were the two messages most often selected by residents as the benefit that would best motivate alternate mode usage.

- After selecting the one message that would most motivate them, residents were encouraged to select an additional message they felt might encourage alternate mode usage. Although reducing air pollution and saving money on gas continued to dominate the other messages, the prospect of saving money on gas was more often selected as one of the top two messages over helping to reduce air pollution (42% vs. 37%).

Public Transit & Alternate Mode Usage

- Overall, residents were most likely to report that they had walked for a trip rather than driving alone in the past year (44%). The other four modes residents were most likely to have used in the past year were carpooling (36%), telecommuting (32% among employed; 25% overall), ridden a city bus (20%), and biking (18%).

- The primary reasons given for driving alone instead of using transit or carpooling is the belief that the bus does not go where they need to go (25%) and a preference for driving (mentioned by 24%).

Propensity to Use Public Transit

- In general, there was little change in residents' perceptions concerning their likelihood to use public transit options. As seen in previous years, residents were most likely to consider using sporting and/or special event shuttles (49%) or the future light rail service (39%).

- Residents most often indicated they would consider using public transit 'if their car broke down or if they did not have a car to use' (30%).

Media Usage

- The Internet continues increase as the most common resource that Valley residents would use to find information about riding the bus (general Internet mentioned by 60% and www.valleymetro.org mentioned specifically by 7%).

- The other two options most commonly cited as possible sources of information about the local transit system were to call Valley Metro's advertised number (19%) or look at the yellow pages (16%).

- As in previous years, more than one-fourth of Valley residents indicated the best way for Valley Metro to communicate information to local residents about the public transit system is through a direct mail piece (22% first mentions; 28% total mentions).

Conclusions

1. Awareness for Valley Metro increased in 2007 at virtually all levels. Aided name awareness increased, as did advertising recall, news story recall and overall recall of advertising and news stories. Unaided name awareness still continues to be relatively low, but this should begin increase as the exposure to advertising and news stories continues. Typically aided awareness increases first with increased advertising, and after repeated exposure unaided awareness begins to grow. This should then be followed by increased awareness of specific services offered by Valley Metro.

2. It is clear, however, that a portion of the increased awareness for Valley Metro is linked to the light construction and the impending opening of Metro Rail service in late 2008. Residents do not appear to differentiate between Valley Metro services and Metro Rail, and "transit" or "bus" service continues to dominate public perception of the services offered by Valley Metro.

3. The overall image of Valley Metro continues to be favorable, with residents more likely to report a positive impression than negative impression of the system. Additionally, information about the use of environmentally friendly fuels on all buses as well as the on-time performance of the local buses will also work to boost the image of the system among residents.

4. Cost savings and reducing air pollution continue to the factors most likely to motivate alternate mode usage. Inconvenience and the preference for driving are the two reasons most likely to stand in the way of alternate mode usage, particularly transit usage. Although the reasons for non-usage have remained essentially the same, there appear to be small indications that residents are perhaps considering alternate modes somewhat more than in the past – carpool usage was up slightly, residents are continuing to be interested in light rail, and the ability to save money using alternate modes appears to be increasing in its appeal

5. The Internet continues to grow as the source that will be turned to for information about Valley Metro and its services. A notable proportion of residents were able to identify www.valleymetro.org as a source, in addition to the more generic Internet reference. The publicized number for Valley Metro continues to be a needed source for information, particularly among older residents.

I. Introduction

A. Background and Methodology

Valley Metro commissioned WestGroup Research of Phoenix to conduct a telephone survey of residents in Maricopa County. The purpose of the survey was to measure awareness and attitudes residents have regarding the various transportation options offered by Valley Metro. This study also provides tracking data for comparison to the Regional Market Studies conducted in 2003, 2005, and 2006.

A total of 502, 12-minute surveys were completed with Maricopa County residents during November 2007. Residents interviewed were at least 18 years old, however, the overall percentage of residents age 55 or older was "capped" at 25% (un-weighted data) to allow Valley Metro to primarily focus on the opinions of its target market. The margin of error for the total sample is ±4.4 at a 95% confidence level.

Quotas were set for five regions within the county to provide statistically meaningful sample sizes for all areas of the Valley. However, in reporting the study results, data for the total sample will be weighted according to the actual population distribution in each region. Data from the individual regions will be reported as un-weighted data. Descriptions of the regions and the associated quotas and weighting percentages are listed in the table below.

Region Description	Quota	Weighting Percentage
Northwest Valley (Wickenburg, Surprise, El Mirage, Youngtown, Litchfield Park, Peoria and Glendale)	**75**	**15%**
Northeast Valley (Cave Creek, Carefree, Scottsdale, Fountain Hills, Paradise Valley, Salt River Indian Community)	**75**	**12%**
Central Valley (Phoenix)	**160**	**38%**
Southwest Valley (Buckeye, Goodyear, Avondale, Tolleson)	**50**	**2%**
Southeast Valley (Mesa, Queen Creek, Gilbert, Chandler, Tempe, Guadalupe, Apache Junction, Higley)	**140**	**33%**
TOTAL	**500**	**100%**

The following report summarizes the results of the cross-tabulated results of the survey. Differences by market segment, region and other demographics variables will be noted when meaningful. The cross-tabulated results for this study are available under separate cover.

B. Personal Demographics

Slightly more women than men were surveyed in 2007 (54% compared to 46%), with the majority reporting being 25 to 54 years of age (63%; per study design noted earlier). Four out of five indicated they were Caucasian (82%). Three quarters (76%) said they have at least some college education, with approximately half reporting that they have graduated from college (46% of total sample). More than half indicated they work full-time (55%), with 8% reporting part-time employment. The average household income for the total sample was $72,400.

Other interesting personal demographics include:

- Average household size was 2.9 people.
- Seven out of eight indicated they have access to the Internet (88%).
- Almost one in six (15%) speak a language in addition to or other than English in their home.
- Almost nine out of ten residents consider themselves to be self-reliant when it comes to getting around the Valley (88%).

Tables 1a and 1b on the following pages show all demographic attributes of the study respondents.

Table 1a: Respondent Demographics

Characteristic	Total Sample (n=502)*	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Gender						
Male	46%	43%	54%	53%	45%	46%
Female	54%	57%	46%	47%	55%	54%
Age						
18 to 24	7%	7%	8%	7%	5%	10%
25 to 34	17%	17%	18%	13%	15%	20%
35 to 44	20%	12%	30%	17%	21%	21%
45 to 54	26%	20%	22%	32%	23%	29%
55 to 64	11%	20%	14%	11%	15%	5%
65+	19%	25%	8%	20%	21%	14%
Average Age	**48 yrs.**	**51 yrs.**	**44 yrs.**	**49 yrs.**	**49 yrs.**	**45 yrs.**
Employment						
Full-time	55%	46%	62%	68%	50%	59%
Retired	22%	34%	18%	17%	25%	17%
Part-time	8%	5%	6%	9%	6%	10%
Homemaker	8%	9%	6%	5%	12%	6%
Unemployed	6%	7%	8%	1%	7%	5%
Student	5%	1%	8%	4%	5%	6%
Education						
Some HS or less	4%	3%	16%	4%	1%	6%
HS graduate	19%	21%	32%	5%	23%	19%
Some college	30%	28%	26%	28%	33%	28%
College graduate	30%	33%	20%	27%	26%	32%
Graduate studies	16%	14%	6%	36%	16%	12%
Income						
Under $30,000	12%	9%	6%	11%	10%	16%
$30K to $49,999	14%	13%	20%	12%	16%	12%
$50K to $69,999	19%	16%	24%	11%	21%	20%
$70K to $99,999	15%	18%	16%	13%	16%	13%
$100,000 or more	23%	29%	16%	36%	20%	21%
Average (000)	**$72.4**	**$78.3**	**$68.8**	**$82.1**	**$70.7**	**$68.4**

* Weighted data

Table 1b: Respondent Demographics

Characteristic	Total Sample (n=502)*	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Ethnicity						
Caucasian	82%	92%	56%	87%	85%	74%
Hispanic	12%	1%	30%	8%	9%	19%
African American	2%	3%	10%	1%	1%	2%
Asian American	-	-	2%	1%	1%	-
American Indian	-	1%	-	-	-	1%
Other	3%	3%	-	1%	4%	2%
Language in Home						
English only	85%	95%	74%	91%	88%	78%
English & Spanish	9%	3%	20%	1%	8%	13%
Spanish only	2%	-	4%	3%	1%	5%
English & other language	3%	3%	-	4%	2%	4%
Only other language	1%	-	2%	1%	1%	-
Average # in Household	2.9	2.7	3.3	2.6	3.2	2.9
Internet Access	88%	91%	84%	91%	92%	82%
Transportation Mobility						
Self reliant	88%	93%	90%	91%	89%	85%
Occasional need	10%	5%	4%	9%	11%	11%
Dependent on others	2%	1%	6%	-	1%	4%

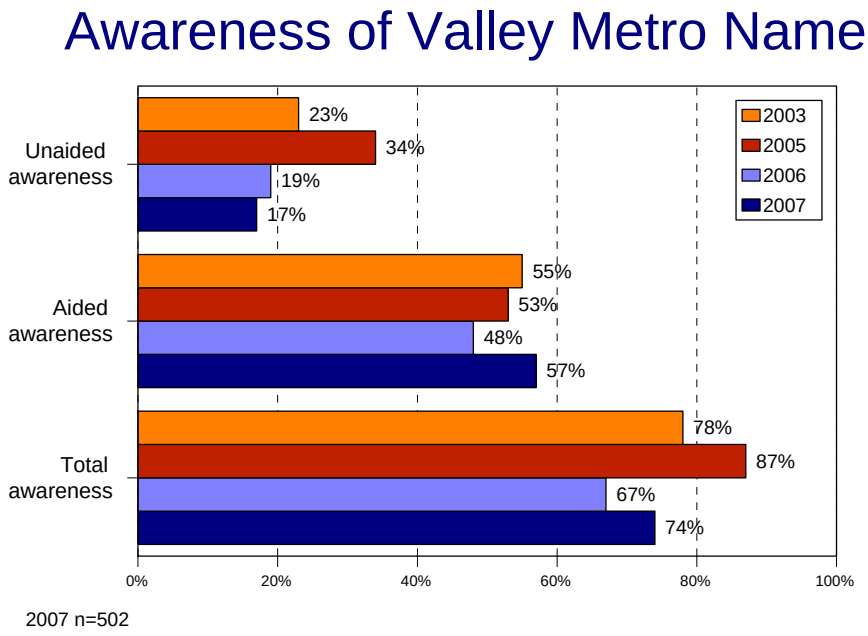
II. System Awareness and Image

A. Awareness of "Valley Metro" Name

When asked, unaided, to recall the name of the Valley's transit system, almost one in six residents (17%) were able to do so correctly (i.e., specifically said "Valley Metro –16% or "Rapid" – 1%). This continues to be lower than awareness levels reported in 2003 and 2005 (in 2005 34% were aware of the agency). It should be noted, however, that the drop in unaided mentions for "Valley Metro" in 2006 corresponded to a wording change in the question. In previous years, residents had been asked to name the transit system in the "valley." Starting in 2006, residents were asked to name the transit system "in the area." It is likely the removal of the reference to "valley" in the question was at least partially responsible for the decline in specific unaided mentions for "Valley Metro" in 2006 and 2007.

Other names mentioned for the transit system were Metro (12%; 9% in 2006), Phoenix Transit (5%; 3% in 2006), Phoenix bus/City of Phoenix (3%; 2% in 2006), city bus/bus (3%; 3% in 2006), and Valley Transit (1%).

In addition to measuring unaided awareness of the Valley Metro name, aided awareness was also assessed. **Aided awareness experienced a significant increase this year (57% up from 48% in 2006). The combined unaided and aided awareness results (total awareness) reflect this increase with overall awareness increasing to almost three out of four residents (74%, up from 67% in 2006).**



Unaided awareness was highest in the Central (20%), Southeast (15%), and Northwest (15%) areas of the Valley. In addition, younger residents had higher recall of the Valley Metro name than older residents (22% of those ages 34 and under vs. 9% of those ages 55 and older), as did those who are employed (19% vs. 11% of unemployed), and residents with a college degree (19% vs. 13% for those with less).

Total awareness was highest among those between the ages of 35 and 54 and residents with a college degree (both 77%). Residents living in the Northeast (79%) and Northwest (78%) regions reported the highest levels of awareness overall.

Table 2a: Awareness of Valley Metro Name

Awareness	**2007 Total (n=502)**	2006 Total (n=504)	2005 Total (n=507)	2003 Total (n=1044)
Unaided*	17%	19%	34%	23%
Aided	57%	48%	54%	55%
Total (Unaided +aided)	74%	67%	87%	78%

*Q1: What is the name of the transit system in the area? Q2: Valley Metro is the name of the transit system in the Valley. Have you heard that name before I just mentioned it now? (Among those not aware unaided.) *includes mentions of "Valley Metro" and "Rapid"*

Table 2b: Awareness of Valley Metro Name - By Region

Awareness	2007 Total (n=502)	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Unaided*	17%	14%	10%	13%	15%	20%
Aided	57%	64%	62%	66%	58%	52%
Total (Unaided +aided)	74%	78%	72%	79%	73%	72%

B. Perceived Image of Valley Metro System

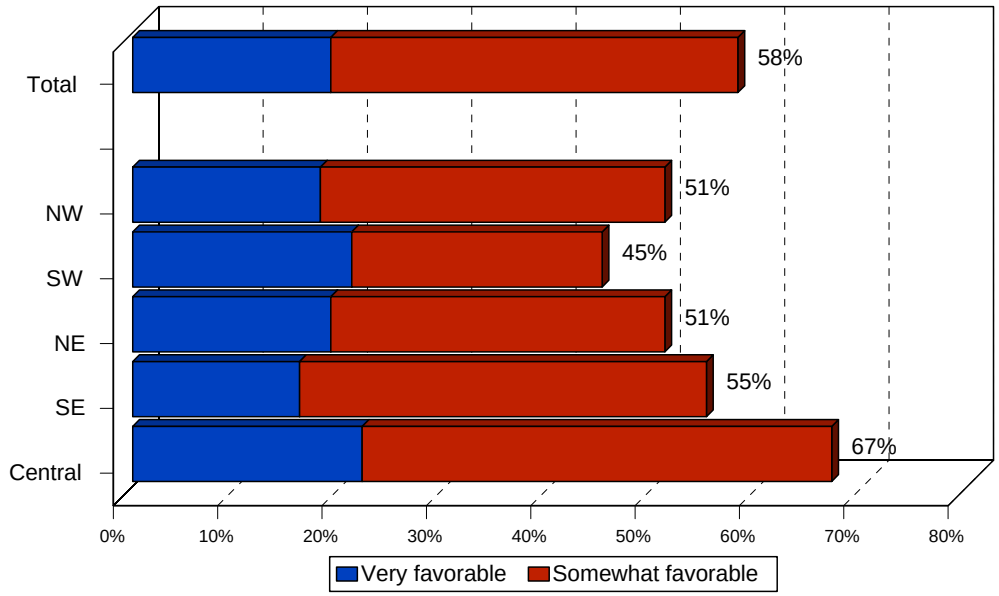
1. Favorability Ratings

Residents aware of Valley Metro were asked to rate their overall perception of the system and the services it offers to the area. **Almost three out of five of residents indicated their impressions of Valley Metro were "somewhat" or "very" favorable (58%), this is up five points from 2006 (53%).** The most positive impressions of the system were reported by residents living in the central region of the county (67%) and the least favorable coming from residents in the southwest region (45%). It is important to note that one in five residents (21%) indicated they were not familiar enough with Valley Metro to offer an opinion regarding its services. This percentage of "don't know" responses increased to more than a third of residents (36%) in the southwest region of the Valley.

Favorability ratings were highest among younger residents (67% of those under age 35 vs. 55% of those age 35 and older) and lower income residents (70% of those with incomes under $50,000 vs. 54% of those with incomes over $50,000).

Favorability Toward Valley Metro Services

Overall, would you say your perception of Valley Metro and the services it provides to the area is...



Among those aware of Valley Metro (n=428 weighted data); % Don't know = 21%

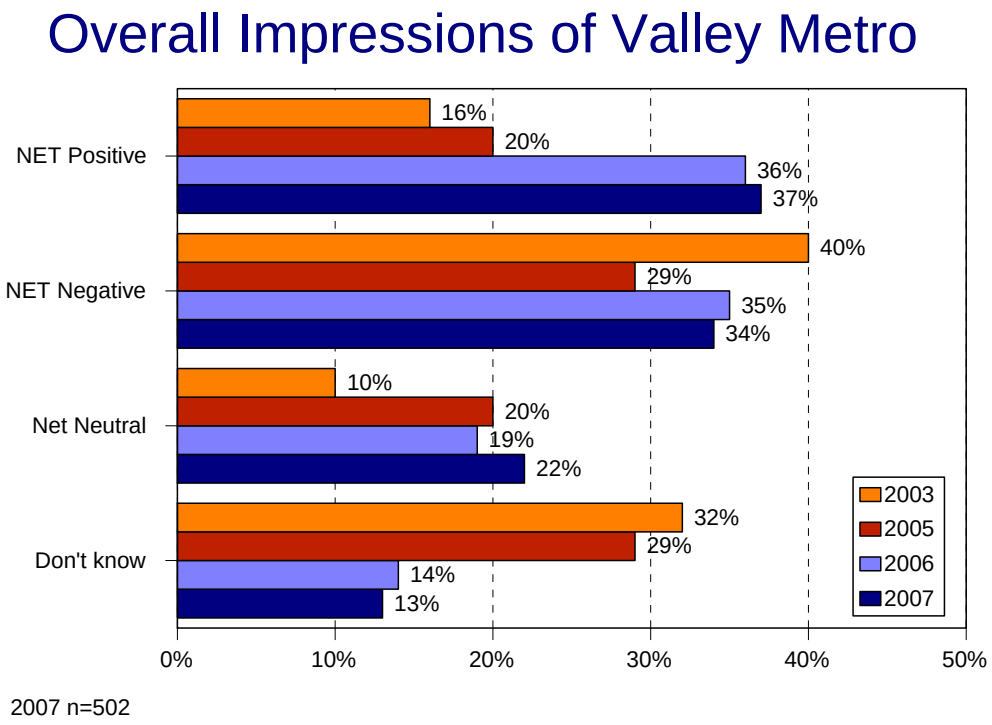
Table 3: Favorability Towards Valley Metro
Among Those Aware of Valley Metro

Awareness	**2007 Total* (n=428)**	2006 Total (n=379)	2007 Regions				
			NW (n=66)	SW (n=42)	NE (n=68)	SE (n=123)	Central (n=130)
Very + Somewhat Favorable	**58%**	53%	51%	45%	51%	55%	67%
Very favorable	**19%**	19%	18%	21%	19%	16%	22%
Somewhat favorable	**39%**	34%	33%	24%	32%	39%	45%
Not very favorable	**12%**	12%	15%	7%	16%	11%	12%
Not at all favorable	**9%**	10%	9%	12%	9%	13%	4%
Don't know	**21%**	25%	24%	36%	24%	20%	18%

Q3: Overall, would you say your perception of Valley Metro and the services it provides to the area is… * Weighted data

2. Overall Image

Those aware of Valley Metro were asked to provide two words describing the local transit system. **Overall, the percentage of residents giving words that reflect a positive image of Valley Metro held steady in 2007 (37% vs. 36% in 2006).** The most frequently mentioned positive images are that is service is "good" (9%), "on time/reliable" (8%), "adequate" (7%), convenient (6%), and available/accessible (3%). The most common negative images of the transit system were that it is "unavailable" or "unreachable" (10%) and "doesn't run enough/need more/too limited (9%).



Overall, residents living in the southwest and central regions were more likely than those living in the other regions of the Valley to have positive impressions of the transit system (41% and 44% positive mentions, respectively vs. 25% to 37% from residents in other regions). Northeast Valley residents were more likely than others to give a "don't know" response (22% vs. 9% to 17% of other residents). Those with lower education levels were also more likely than those with a college degree to offer favorable images of the transit system (43% positive vs. 31%), as were lower income residents (48% of those who make less than $50,000 per year vs. 31% for those who make more).

Southwest area residents were significantly more likely than others to offer impressions of "good" or "satisfactory" (21%). Residents living on the northwest region were most likely to offer responses of "unavailable" and "unreachable" (14% vs. 7% to 11% for other regions). More than one in five central region residents also felt the system is too limiting and does not run often enough (11%).

Table 4a: Impressions of Valley Metro System
Among Those Aware of Valley Metro

Impression	**2007 Total (n=428)**	2006 Total (n=336)	2005 Total (n=441)	2004 Non-Rider (n=407)
NET Positive	**37%**	**36%**	**20%**	**16%**
Good/satisfactory	9%	10%	11%	-
On-time/ reliable	8%	5%	-	-
Adequate/efficient	7%	6%	3%	6%
Convenient/accessible	6%	6%	-	-
Available/accessible	3%	-	-	-
Useful/helpful	2%	4%	2%	6%
Needed	2%	4%	-	-
Everywhere	2%	2%	-	-
Friendly drivers	2%	2%	-	-
Clean/good repair	2%	1%	-	-
Better/improving	2%	1%	2%	-
Frequent	2%	-	-	-
Cheap/economical	1%	2%	2%	1%
Environmentally friendly	1%	-	-	-
NET Negative	**34%**	**35%**	**29%**	**40%**
Unavailable/ unreachable	10%	15%	4%	4%
Need more/limited	9%	-	-	-
Inadequate/ inefficient	5%	11%	9%	19%
Slow	4%	4%	4%	4%
Inconvenient	3%	3%	2%	7%
Not enough hours	3%	1%	-	-
Poor/bad	2%	3%	7%	9%
Underused	2%	1%	-	-
Non-existent	1%	5%	3%	3%
Unreliable/late	1%	2%	2%	-
Useless	1%	-	-	-
Buses block traffic	1%	-	-	-
Messy/dirty/trash	1%	-	-	-
Expensive	1%	-	-	-
NET Neutral	**22%**	**19%**	**20%**	**10%**
Never used it	15%	11%	6%	-
OK/fair	4%	4%	5%	8%
Bus/trans. system	2%	3%	6%	-
Mentioned colors	1%	-	-	-
Other	10%	7%	8%	6%
Don't know/NA	13%	14%	29%	32%

Q4: What words would you use to describe the Valley Metro public transit system?
*Includes all responses with a consensus of 1% or less.

Table 4b: Impressions of Valley Metro System – By Region
Among Those Aware of Valley Metro

Impression	2007 Total* (n=428)	2007 Regions				
		NW (n=66)	SW (n=42)	NE (n=68)	SE (n=123)	Central (n=130)
NET Positive	**37%**	**29%**	**40%**	**25%**	**37%**	**44%**
Good/satisfactory	9%	11%	21%	6%	7%	9%
On-time/ reliable	8%	5%	-	6%	7%	10%
Adequate/efficient	7%	5%	5%	4%	8%	9%
Convenient/accessible	6%	-	10%	3%	6%	9%
Available/accessible	3%	3%	2%	2%	4%	2%
Useful/helpful	2%	3%	-	3%	1%	2%
Needed	2%	2%	2%	2%	4%	1%
Everywhere	2%	3%	2%	3%	1%	2%
Friendly drivers	2%	2%	5%	-	2%	3%
Clean	2%	2%	2%	-	1%	3%
Better/improving	2%	-	-	-	3%	2%
Frequent	2%	2%	-	-	2%	2%
Cheap/economical	1%	-	-	2%	1%	1%
Environmentally friendly	1%	-	-	-	-	2%
NET Negative	**34%**	**33%**	**21%**	**32%**	**33%**	**35%**
Unavailable/ unreachable	10%	14%	10%	7%	11%	9%
Need more/limited	9%	8%	2%	7%	8%	11%
Inadequate/ inefficient	5%	2%	2%	2%	7%	5%
Slow	4%	5%	-	3%	2%	5%
Inconvenient	3%	5%	-	4%	4%	2%
Not enough hours	3%	5%	-	3%	2%	3%
Poor/bad	2%	3%	2%	2%	2%	2%
Underused	2%	5%	-	7%	-	2%
Unreliable/late	1%	2%	-	2%	1%	-
Non-existent	1%	-	-	-	1%	1%
Buses block traffic	1%	-	-	-	2%	1%
Useless	1%	2%	5%	2%	2%	-
Messy/trash/dirty	1%	2%	-	-	1%	1%
Expensive	1%	-	-	-	1%	1%
NET Neutral	**22%**	**29%**	**33%**	**26%**	**24%**	**15%**
Never used it	15%	21%	19%	10%	20%	11%
OK/fair	4%	5%	12%	7%	3%	3%
Bus/trans. system	2%	-	3%	5%	7%	1%
Colors mentioned	1%	-	-	2%	1%	1%
Other**	10%	3%	5%	18%	8%	12%
Don't know/NA	13%	17%	10%	22%	11%	11%

* Weighted data. **Includes all responses with a consensus of 1% or less.

C. Awareness of Valley Metro Services

1. Unaided Awareness of Services

Residents are most likely to be aware that Valley Metro provides local bus service (75%), the future light rail service (15%), and Dial-a-ride services (14%). With the exception of light rail service, awareness of the services provided by Valley Metro among those aware of the system overall remained essentially the same as last year. With light rail currently under construction throughout the Valley and targeted for completion in 2008, it is unsurprising that awareness of the service continues to increase (from 1% in 2003 to 15% in 2007). Awareness of Valley Metro providing local bus service is highest in the northeast and central regions of the county (82% and 81% respectively) and lowest in the northwest (62%).

Employed residents were significantly more likely to be aware that Valley Metro offers bus service (81% vs. 64%), future light rail service (17% vs. 10%), and vanpool and carpool assistance (6% and 5% vs. 2% of those not employed).

Table 5a: Unaided Awareness of Valley Metro Services – Total Mentions
Among Those Aware of Valley Metro/Metro

Services	**2007 Total (n=428)**	2006 Total (n=379)	2005 Total (n=441)	2003 Total (n=1044)
Local/City bus svc.	75%	73%	80%	60%
Future light rail system	15%	8%	4%	1%
Dial-a-Ride	14%	17%	18%	16%
Handicapped assistance	7%	4%	-	-
Transportation (general)	6%	3%	-	-
Rapid/ Express bus svc.	5%	4%	6%	2%
Vanpools	5%	3%	6%	4%
Neighborhood circulator*	4%	4%	4%	2%
Carpool assistance	4%	4%	2%	1%
Other	3%	6%	5%	6%
Don't know	17%	23%	18%	15%

Q5: What services does Valley Metro provide? What others?
**(i.e., RAPID, DASH, Dial-A-Ride etc.)*

Table 5b: Unaided Awareness of Valley Metro Services
Total Mentions By Region
Among Those Aware of Valley Metro/Metro

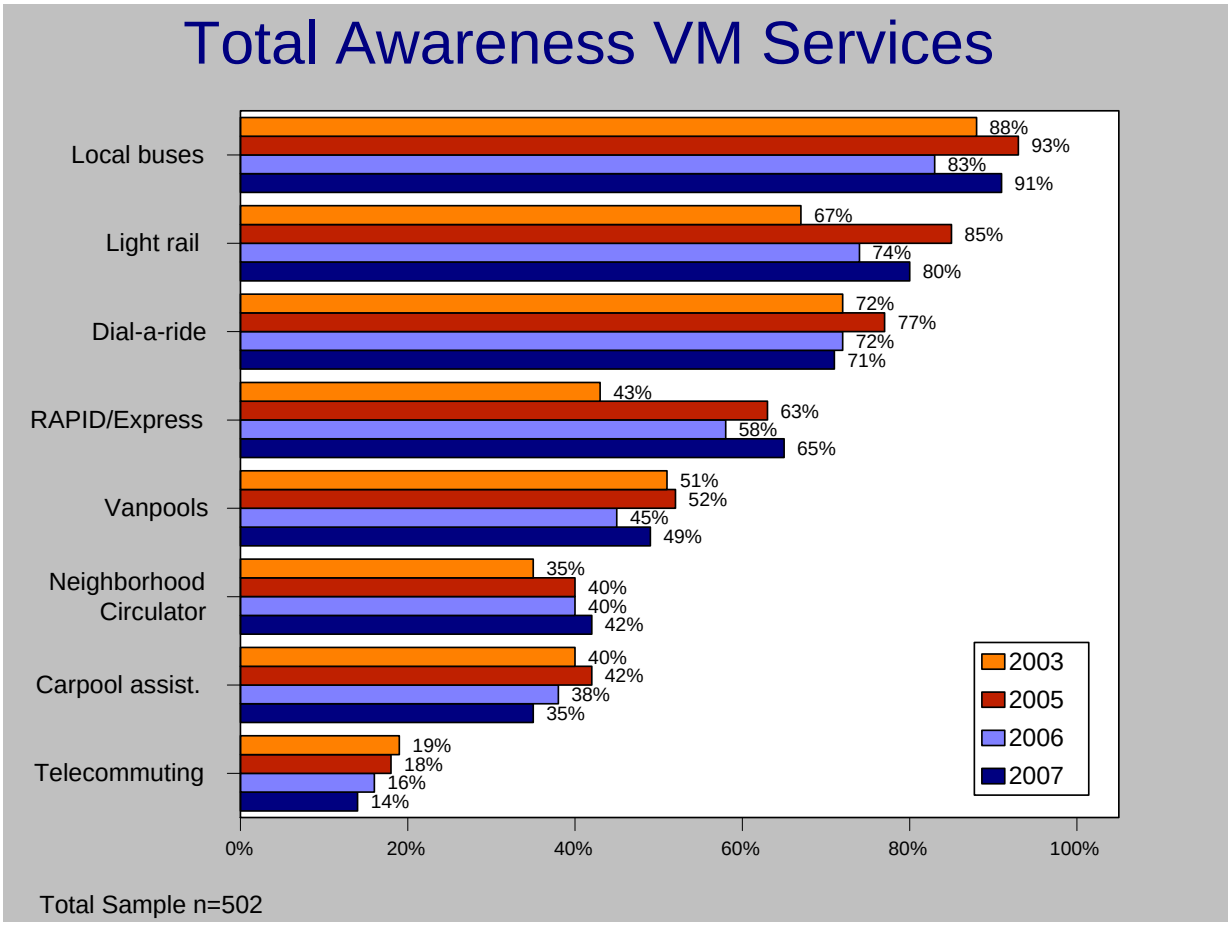
Services	2007 Total* (n=428)	2007 Regions				
		NW (n=66)	SW (n=42)	NE (n=68)	SE (n=123)	Central (n=130)
Local/City bus svc.	75%	62%	69%	82%	72%	81%
Future light rail system	15%	9%	5%	15%	11%	21%
Dial-a-Ride	14%	8%	7%	13%	8%	23%
Handicapped assistance	7%	-	5%	10%	7%	8%
Transportation (general)	6%	8%	12%	6%	9%	2%
Rapid/ Express bus svc.	5%	2%	2%	3%	4%	9%
Vanpools	5%	2%	10%	6%	5%	5%
Neighborhood circulator**	4%	3%	2%	7%	2%	5%
Carpool assistance	4%	-	2%	6%	4%	4%
Other	3%	2%	5%	5%	3%	3%
Don't know	17%	30%	14%	13%	15%	15%

**Weighted data. **(i.e., RAPID, DASH, Dial-A-Ride etc.)*

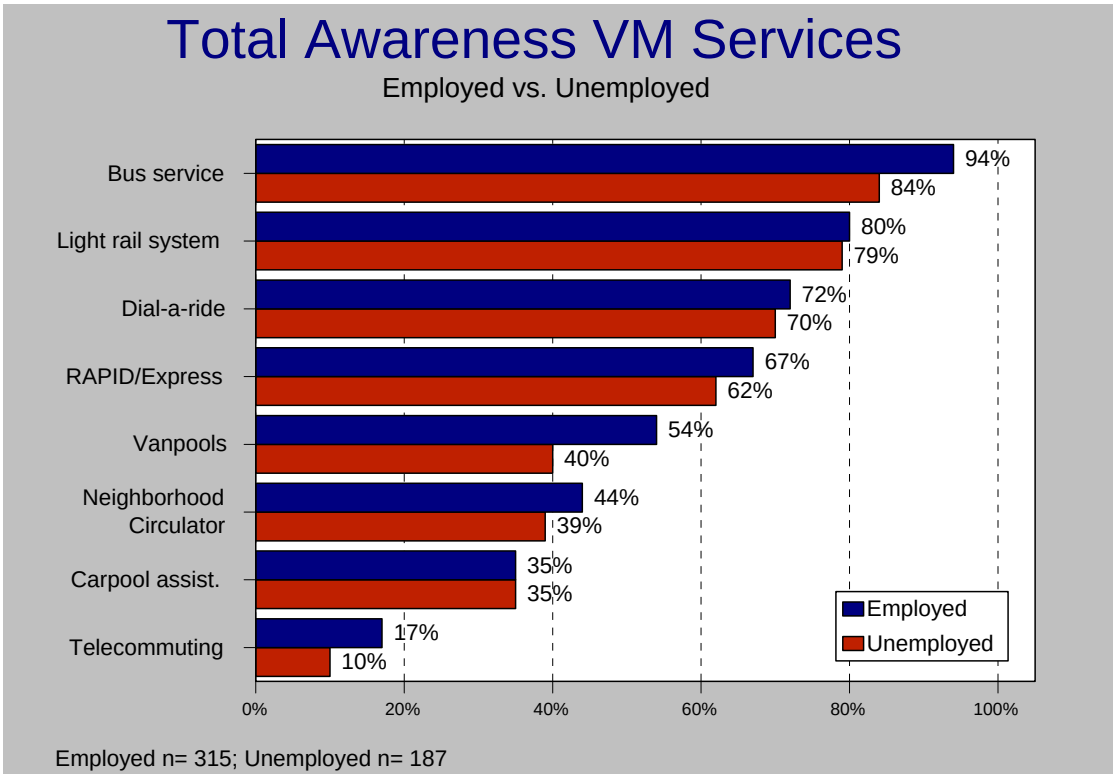
2. *Awareness of Specific Services (Net Unaided + Aided Awareness)*

In addition to measuring unaided awareness of the Valley Metro services, aided awareness of each service was also assessed. **As seen in previous years, awareness is highest for local bus service (91%), light rail service (80%), dial-a-ride service (71%), and RAPID/express bus service (65%).**

This year some services experienced a resurgence in awareness compared to 2006 when awareness of all services had dropped across the board – specifically local bus service (up 8 points), RAPID/express bus service (up 7 points), light rail (up 6 points) and van pools (up 4 points). While Dial-a-ride is one the top three services in overall awareness, little change was reported this year (1 point drop), as was the case with neighborhood circulators (up 2 points), carpool assistance (down 3 points) and telecommuting (down 2 points).



As expected, based on awareness of services overall, residents in the central region of the county were most likely to be aware of the specific services offered by Valley Metro. General awareness of services is also higher among employed residents than among those who are not employed.



Awareness of local bus service was highest among men (94% vs. 88%) and those younger than age 55 (93% vs. 84%), while awareness of light rail service was highest among those between the ages of 35 and 54 (85% vs. 75% for those younger and 76% for those older), residents with at least some college education (83% vs. 69%) and those with a household income of more than $50,000 per year (86% vs. 75%). Those most likely to be aware of Dial-a-ride services are those with at least some college education (74% vs. 63%). Residents under the age of 55 also were more likely than older residents to indicate awareness of vanpool services and neighborhood circulator services (approximately 50% of those under age 55 compared to one-third of those over age 55).

Table 6a: Total Awareness of Valley Metro Services

Service	**2007 Total (n=502)**	2006 Total (n=504)	2005 Total (n=507)	2003 Total (n=1044)
Local/City bus svc.	91%	83%	93%	88%
Future light rail system	80%	74%	85%	67%
Dial-a-Ride	71%	72%	77%	72%
RAPID/Express	65%	58%	63%	43%
Vanpools	49%	45%	52%	51%
Neighborhood circulator	42%	40%	40%	35%
Carpool assistance	35%	38%	42%	40%
Telecommuting	14%	16%	18%	19%

Q6: Valley Metro offers a wide variety of services across the Valley or will be in the near future. I'm going to read you a list of these services. For each one, please indicate if you are aware or familiar with that service in the Valley.

Table 6b: Total Awareness of Valley Metro Services – By Region

Service	2007 Total* (n=502)	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Local/City bus svc.	91%	83%	82%	96%	90%	93%
Future light rail system	80%	78%	74%	81%	84%	77%
Dial-a-Ride	71%	79%	64%	65%	64%	77%
RAPID/Express	65%	74%	66%	52%	89%	71%
Vanpools	49%	50%	58%	43%	52%	46%
Neighborhood circulator	42%	33%	26%	29%	40%	52%
Carpool assistance	35%	40%	42%	27%	36%	34%
Telecommuting	14%	12%	12%	8%	14%	18%

*Q6: Valley Metro offers a wide variety of services across the Valley or will be in the near future. I'm going to read you a list of these services. For each one, please indicate if you are aware or familiar with that service in the Valley. *Weighted data.*

D. Perceptual Impact of Specific Valley Metro Facts

Residents were provided with factual statements about Valley Metro's services and asked if that information had any impact on their perceptions of the organization. **Overall, all three statements were well received (60% to 80% reacting positively), with the buses use of environmentally friendly fuels having the strongest positive impact (80%). On time performance was also viewed positively (79%), while details about miles traveled and passenger boardings were significantly more likely than the others to have no effect (36%)**.

Employed residents (83% vs. 76% of those not employed) and resident ages 35 to 54 (85% vs. 74% of those under age 35) were more likely than others to indicate the information about buses using environmentally fuels led them to think more positively about Valley Metro. Residents in the northwest and central regions were significantly more likely than others to indicate that on-time bus performance made a positive impact on their perception of Valley Metro (83% and 81%).

Table 7a: Perceptual Impact of Valley Metro Facts

Fact	Think more positively	No effect	Think negatively	Don't know
Nearly all VM buses use environmentally friendly fuels	80%	17%	1%	2%
VM buses have an on-time performance rate of 95%	79%	17%	2%	2%
There are more than 26 million miles of VM bus service traveled annually & more than 58 million passenger boardings per year	60%	36%	1%	3%

Q9a-c: I'm going to read you a few facts about Valley Metro services and I would like to find out if knowing the information has any impact on your perceptions of Valley Metro – makes you think more positively about Valley Metro, have no effect on your perceptions, or makes you think negatively about Valley Metro.

Table 7b: Positive Impact of Statements – By Region

Statement	2007 Total* (n=502)	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Nearly all VM buses use environmentally friendly fuels	80%	76%	78%	80%	84%	79%
VM buses have an on-time performance rate of 95%	79%	83%	64%	79%	76%	81%
There are more than 26 million miles of VM bus service traveled annually & more than 58 million passenger boardings per year	60%	66%	56%	60%	55%	61%

* Weighted data.

III. Advertising and News Story Awareness

A. Advertising Awareness

Awareness of advertising for Valley Metro jumped substantially in 2007. Currently, two in five residents (41% compared to 30% in 2006) reported seeing or hearing advertising (not news stories) for Valley Metro. Awareness was consistent across regions, with the exception of notably lower awareness among residents in the southwest region (28%). Awareness was highest among younger residents (44% of those under age 55 vs. 32% for those older).

As found in previous years, residents are most likely to report seeing Valley Metro advertising on television (41%), in print ads (21%), and on the buses (18%). While those who cited billboards decreased slightly in 2007 after a significant jump in 2006; residents citing the web or online sources increased (6% up from 2% in 2006), as did those citing more traditional printed efforts (Bus Book, direct mail, flyers, and the phonebook – 2%, 2%, 2% and 1% respectively).

Table 8a: Ad Awareness and Source

Awareness/ Source	**2007 Total (n=502)**	2006 Total (n=504)	2005 Total (n=507)	2003 Total (n=1044)
Aware of Advertising	**41%**	**30%**	**27%**	**26%**
Source*				
TV	41%	37%	47%	45%
Print ads	21%	23%	22%	23%
Ads on buses	18%	22%	14%	21%
Billboards	12%	18%	6%	4%
Radio	11%	11%	9%	10%
Web site/online	6%	2%	3%	-
Work	4%	4%	-	-
Bus stops	2%	2%	-	-
Direct mail	2%	-	3%	-
Bus Book	2%	-	-	-
Flyers	2%	-	-	-
Events/sponsorships	1%	-	-	-
Phone book	1%	-	-	-
Other	3%	5%	10%	6%
Don't know	7%	6%	4%	6%

*Q7-7a: Thinking of only paid advertising and not about news stories, in the past few months do you recall seeing or hearing any advertising about Valley Metro services? Where did you see the advertising for Valley Metro? (*Among those aware of the advertising.)*

Table 8b: Ad Awareness and Source By Region

Awareness/ Source	2007 Total* (n=502)	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Aware of Advertising	**41%**	**32%**	**28%**	**35%**	**45%**	**44%**
Source**						
TV	41%	42%	43%	35%	46%	39%
Print ads	21%	25%	21%	31%	25%	13%
Ads on buses	18%	8%	7%	19%	16%	23%
Billboards	12%	13%	14%	12%	13%	10%
Radio	11%	4%	-	19%	14%	7%
Web site	6%	4%	-	4%	6%	6%
Work	4%	8%	-	8%	2%	4%
Direct mail	2%	-	-	4%	-	3%
Bus stops	2%	4%	-	-	3%	-
Bus Book	2%	-	-	-	2%	3%
Flyers	2%	4%	-	-	2%	1%
Events/Sponsorships	1%	-	-	-	-	3%
Phonebook	1%	-	-	-	-	1%
Movie theater slides	-	-	-	4%	-	-
Other	2%	8%	7%	-	2%	1%
Don't know	7%	4%	7%	8%	5%	10%

*Q7-7a: Thinking of only paid advertising and not about news stories, in the past few months do you recall seeing or hearing any advertising about Valley Metro services? Where did you see the advertising for Valley Metro? *Weighted data. **Among those aware of the advertising.*

Those who recall seeing advertising within the past few months were asked if they could remember what the ad was about. **Approximately three in five residents aware of the advertising were able to recall a specific advertising message, however, it appears that residents were still confusing advertising with news stories, considering that light rail was the most commonly recalled "advertising" message (mentioned by 13%). The other commonly recalled messages were to carpool (12%) and ride the bus (9%).** Other messages remembered by those aware of the Valley Metro ads included general mentions of Valley Metro (7%), route and schedule information (7%), and efforts to reduce air pollution (4%).

Table 9: Recalled Advertising Message
Among those aware of advertising

Message	**2007 Total (n=205)**	2006 Total (n=150)	2005 Total (n=138)	2003 Total (n=269)
Light rail	13%	10%	9%	7%
Carpool	12%	14%	21%	17%
Ride the bus	9%	-	-	-
Valley Metro (nonspecific)	7%	11%	6%	3%
Route/schedule info.	7%	-	5%	6%
Reducing air pollution	4%	5%	6%	4%
Fare/rate increase	3%	-	-	-
High pollution advisories	2%	4%	4%	1%
They are hiring	2%	3%	3%	5%
Improving transit system	2%	1%	-	-
Services offered	2%	9%	7%	6%
Dial-a-Ride	2%	-	-	-
High gas/saving gas	1%	-	-	-
Contact info	1%	-	-	-
Tempe in Motion (TIM)	1%	-	-	-
Instead of drive/read book	1%	-	-	-
Vanpool	1%	-	-	-
Other	14%	9%	10%	8%
Don't recall	34%	38%	39%	45%

Q7b: What was the message of the advertising that you saw?

B. Awareness of News Stories

Awareness of news stories about Valley Metro exceeded awareness of advertising for Valley Metro (47% compared to 41%), with news regarding the new light rail system dominating (79% of mentions). Awareness was highest among older residents (52% of those over age 35 vs. 32% for those younger), residents with a household income of more than $50,000 per year (52% vs. 40%), and those with at least some college education (51% compared to 33%).

Table 10a: News Story Awareness and Message

Story/Message	2007 Total (n=502)	2006 Total (n=504)	2005 Total (n=507)	2003 Total (n=1044)
Aware of News Stories	**47%**	**32%**	**38%**	**25%**
Message Content*				
NET Light Rail	**79%**	79%	60%	62%
Light rail construction	63%	57%	60%	62%
Light rail/non-specific	12%	7%	-	-
Light rail is happening	10%	15%	-	-
Light rail trial run	5%	-	-	-
NET Bus Related	**20%**	25%	17%	8%
Fare changes	6%	-	-	-
More routes/hours	6%	4%	3%	6%
Bus ridership	3%	16%	3%	1%
People crashing into buses	2%	1%	2%	1%
RAPID svc/routes	1%	3%	-	-
Possible strike	1%	1%	9%	-
High gas prices	1%	1%	3%	-
Violence on bus	1%	-	-	-
New buses	1%	-	-	-
Special decorated buses	1%	-	-	-
Undercover cops	1%	-	-	-
NET Other Services	**3%**	-	-	-
Neighborhood circulators	2%	-	-	-
Dial-a-Ride	1%	-	-	-
Other	6%	7%	16%	11%
Don't know	6%	11%	8%	15%

*Q8-8a: What were those news stories about? (*Among those aware of news stories.)*

Table 10b: News Story Awareness and Message By Region

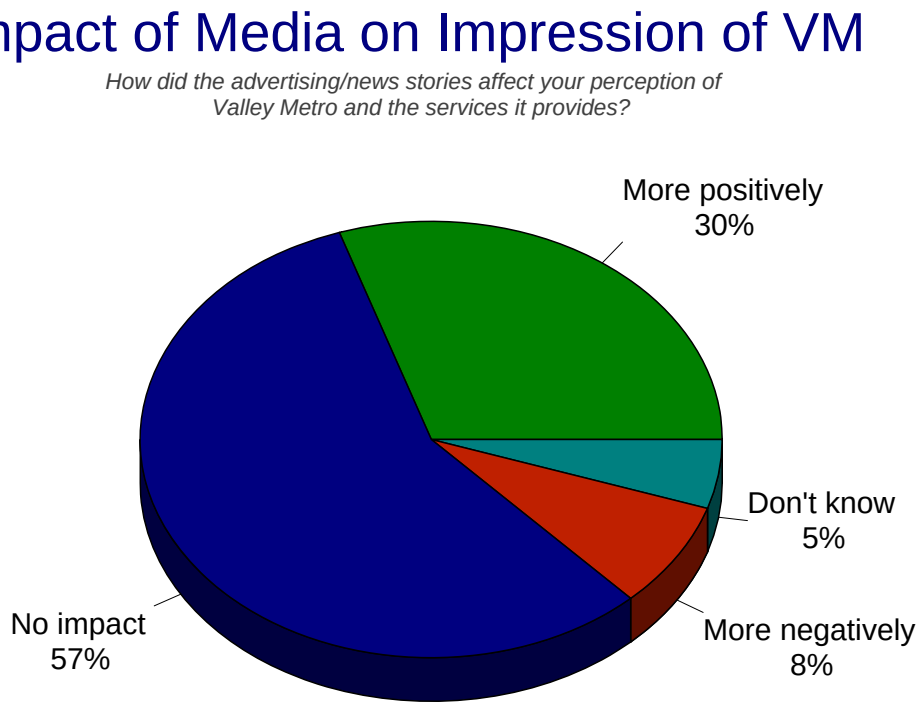
Story/Message	2007 Total* (n=502)	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Aware of News Stories	**47%**	**41%**	**36%**	**65%**	**46%**	**45%**
Message Content**						
NET Light Rail	**79%**	**74%**	**83%**	**76%**	**83%**	**79%**
Light rail construction	63%	61%	56%	61%	63%	64%
Light rail/non-specific	12%	6%	28%	16%	11%	14%
Light rail is happening	10%	6%	22%	8%	8%	12%
Light rail trial run	5%	6%	-	2%	6%	6%
NET Bus Related	**20%**	**23%**	**22%**	**18%**	**17%**	**22%**
Fare changes	6%	10%	11%	8%	3%	7%
More routes/hours	6%	6%	6%	6%	8%	4%
Bus ridership	2%	3%	6%	2%	2%	3%
People crashing into buses	2%	3%	6%	-	-	3%
RAPID svc/routes	1%	3%	-	2%	-	-
Possible strike	1%	-	-	-	2%	1%
High gas prices	1%	-	-	4%	2%	-
Violence on bus	1%	-	-	-	-	3%
New buses	1%	-	-	-	2%	1%
Special decorated buses	1%	-	-	2%	-	1%
Undercover cops	1%	-	-	2%	-	1%
NET Other Services	**3%**	**-**	**-**	**6%**	**-**	**4%**
Neighborhood circulators	2%	-	-	4%	-	3%
Dial-a-Ride	1%	-	-	2%	-	1%
Other	6%	-%	6%	8%	4%	8
Don't know	6%	3%	-	8%	9%	4%

*Q8-8a: What were those news stories about? *Weighed data. **Among those aware of news stories.*

C. Impact of Media - News Stories and/or Advertising

Residents who indicated that they had seen or heard advertising or news stories about Valley Metro were asked to evaluate the impact of the media on their perceptions of Valley Metro. **Residents were almost four times more likely to indicate that news stories and advertising had a positive impact on their impressions of Valley Metro than a negative impact (30% vs. 8%).**

Men were significantly more likely than women to report that news stories and advertising had had a negative impact on their perception of Valley Metro (11% vs. 5%).



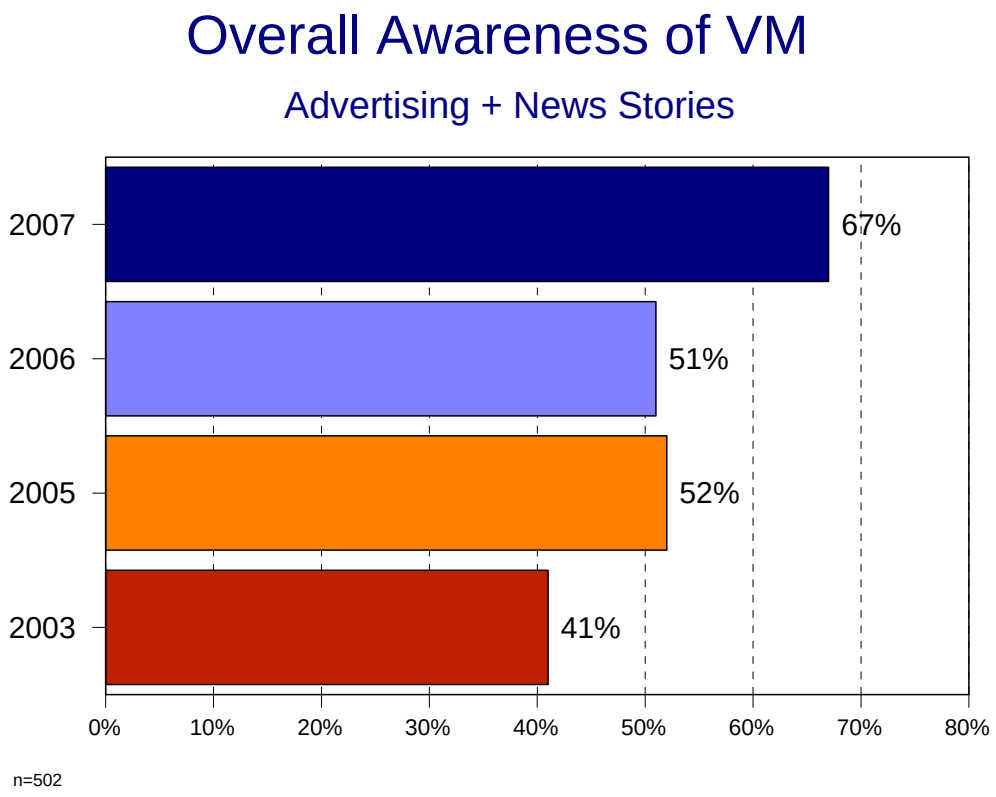
Among those who recall advertising/news stories (n=338)

D. Overall Awareness

Combined advertising and news story awareness for Valley Metro showed a significant increase in 2007, with two out of three residents reported seeing or hearing about the organization (67%) from one or both of these sources – the highest level observed in the last four years.

NET awareness of advertising and news stories about Valley Metro was significantly higher among the following demographic groups:

- Residents with a household income of more than $50,000 (72% vs. 61% for those who earn less).
- Residents over the age of 35 (71% vs. 55% for those younger).
- Smaller households (71% of those with three or fewer people vs. 60% for those with a household of 4 or more people).

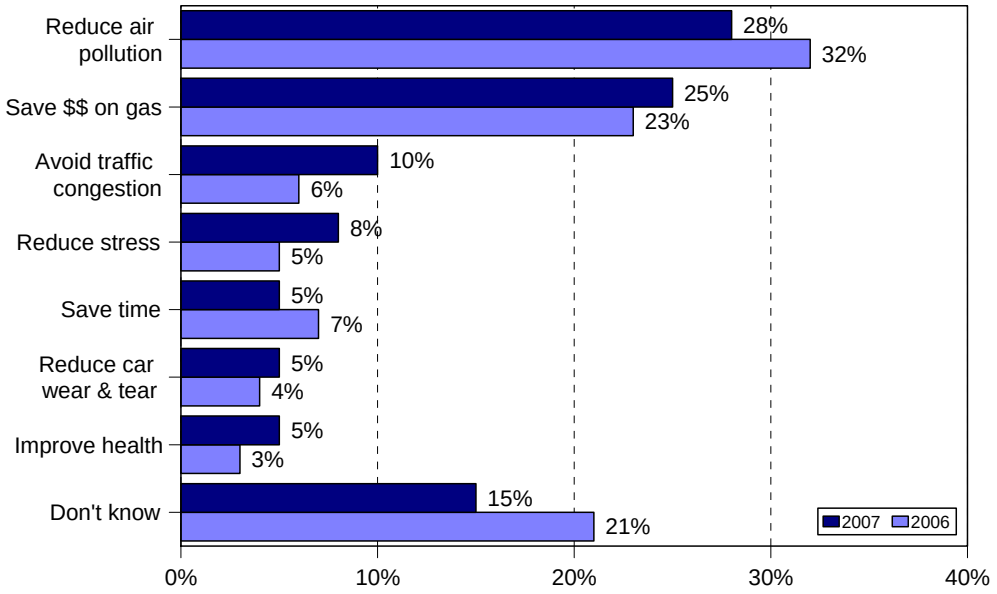


E. Motivating Messages

Residents were read seven messages describing potential benefits of alternate mode usage and asked to select the one message that would be most likely to motivate them to consider using an alternate mode. **As in the past, reducing air pollution (selected by 28%) and saving money on gas (25%) were the two messages most often selected by residents as the benefit that would best motivate alternate mode usage.** However, residents were less likely to be motivated by their ability to reduce air pollution (down 4 points) and were slightly more likely than last year to indicate they were motivated by the possibility of saving money on gas (two points higher), avoiding traffic congestion (four points higher), and reducing their stress (three points higher).

Most Motivating Message for Alternate Mode Usage

Which ONE of the following types of messages would most likely encourge you to consider using alternative methods of transportation for getting around the Valley instead of driving alone?



n=502

- Those most likely to select "reducing air pollution" as the message most likely to encourage alternate mode usage were women (34%), residents between the ages of 35 and 54 (32%), and those living in the central region of the county (32%).

- Those most likely to be encouraged to use alternate modes because of the prospect of saving money on gas were those with four or more members in their household (28%).

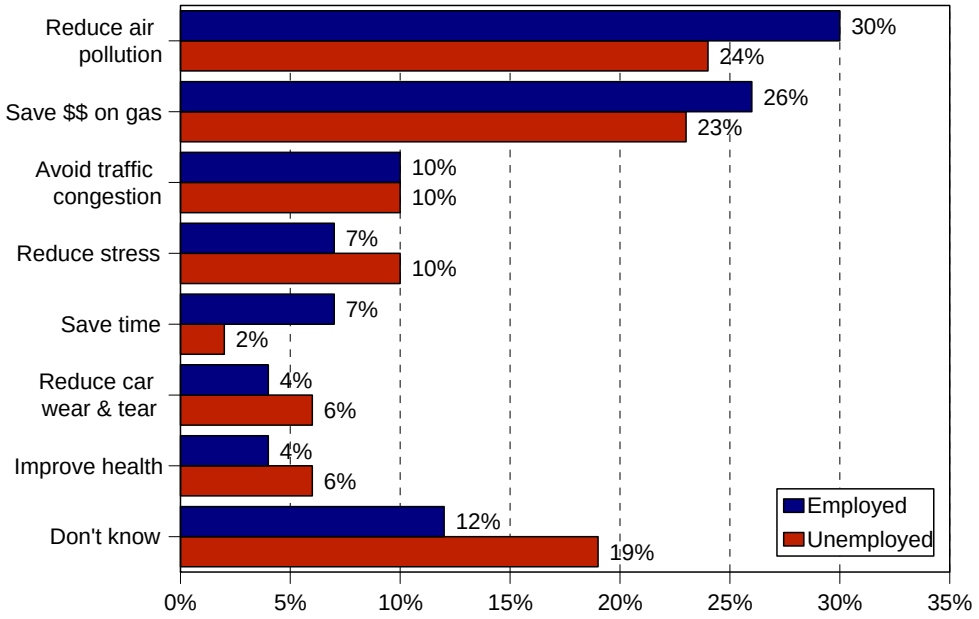
- "Avoiding traffic congestion" was most often selected as the most motivating message by residents who live in a household of at least two or more people (11% vs. 1% of single-person households).

- "Reducing stress" as a message resonated most strongly with residents who had at least some college education (9% compared to 4% for those with only a high school degree or less) and residents of households with three or less people (10% vs. 5% for households of 4 or more).

The graph below shows that employed residents are more likely than those who are not employed to be motivated to use an alternate mode because they can reduce air pollution (30% vs. 24%), save money on gas (26% vs. 23%), and save time (7% vs. 2%).

Most Motivating Message for Alternate Mode Usage

Employed vs. Not employed



After selecting the one message that would most motivate them, residents were encourage to select an additional message they felt might encourage alternate mode usage. As reported last year, **although reducing air pollution and saving money on gas continued to dominate the other messages, the prospect of saving money on gas was more often selected as one of the top two messages over helping to reduce air pollution (42% vs. 37%; see Table 11a).** In addition, approximately one in six residents (17%) also indicated that avoiding traffic congestion would be a potential motivator for alternate mode usage.

Table 11a: Motivating Messages
Comparing First Mentions & Total Mentions

Message	**2007 *First* Mentions** (n=502)	2006 *First* Mentions (n=504)	**2007 Total Mentions** (n=502)	2006 Total Mentions (n=504)
Reduce air pollution	28%	32%	37%	40%
Save money on gas	25%	23%	42%	45%
Avoid traffic congestion	10%	6%	17%	13%
Reduce stress	8%	5%	15%	10%
Save time	5%	7%	7%	9%
Reduce wear/tear on car	5%	4%	13%	9%
Improve your health	5%	3%	7%	6%
Don't know	15%	21%	15%	21%

Q10: Which ONE of the following types of messages would most likely encourage you to consider using alternative methods of transportation fro getting around the Valley instead of driving alone?

Table 11b: Motivating Messages
Total Mentions By Region

Message	**2007 Total* Mentions** (n=502)	Total Mentions By Region				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Reduce air pollution	37%	30%	34%	36%	38%	39%
Save money on gas	42%	47%	40%	43%	45%	37%
Avoid traffic congestion	17%	14%	16%	13%	15%	20%
Reduce stress	15%	13%	6%	17%	14%	15%
Reduce wear/tear on car	13%	15%	20%	11%	12%	13%
Save time	7%	7%	4%	7%	11%	4%
Improve your health	7%	7%	12%	5%	6%	9%
Don't know	15%	17%	12%	21%	14%	13%

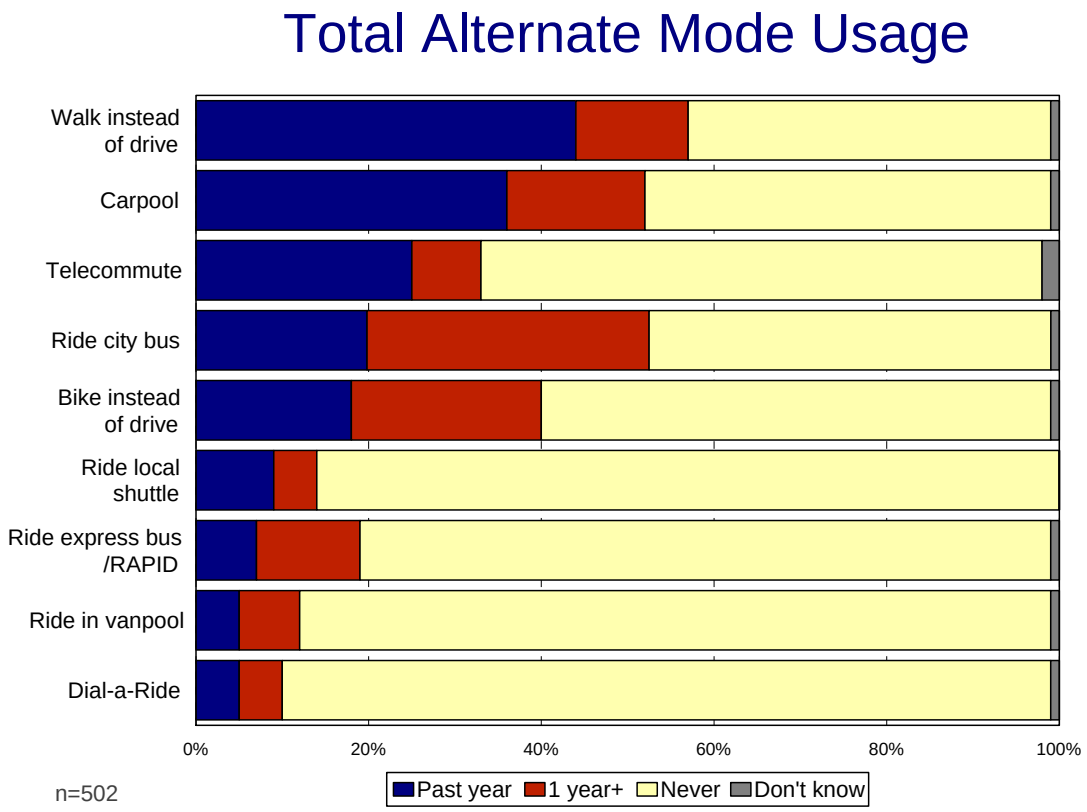
**Weighted data.*

IV. Public Transit and Alternate Mode Usage

A. Alternate Mode Usage

Overall, residents were most likely to report that they had walked for a trip rather than driving alone in the past year (44%). This is consistent with findings from previous years. **The other four modes residents were most likely to have used in the past year were carpooling (36%), telecommuting (32% among employed; 25% overall), ridden a city bus (20%), and biking (18%).** The percent of residents reporting to carpool in the past year increased from 2006 (21% to 36%), however, the phrase "to work" was removed from the label, so that is likely the reason for the increase with more residents reporting to carpool to destinations other than work sites.

When evaluating the alternate modes most likely to have been "ever used" by residents, walking (57%), carpooling (53%), and riding the city bus (52%) are the three most commonly used modes.



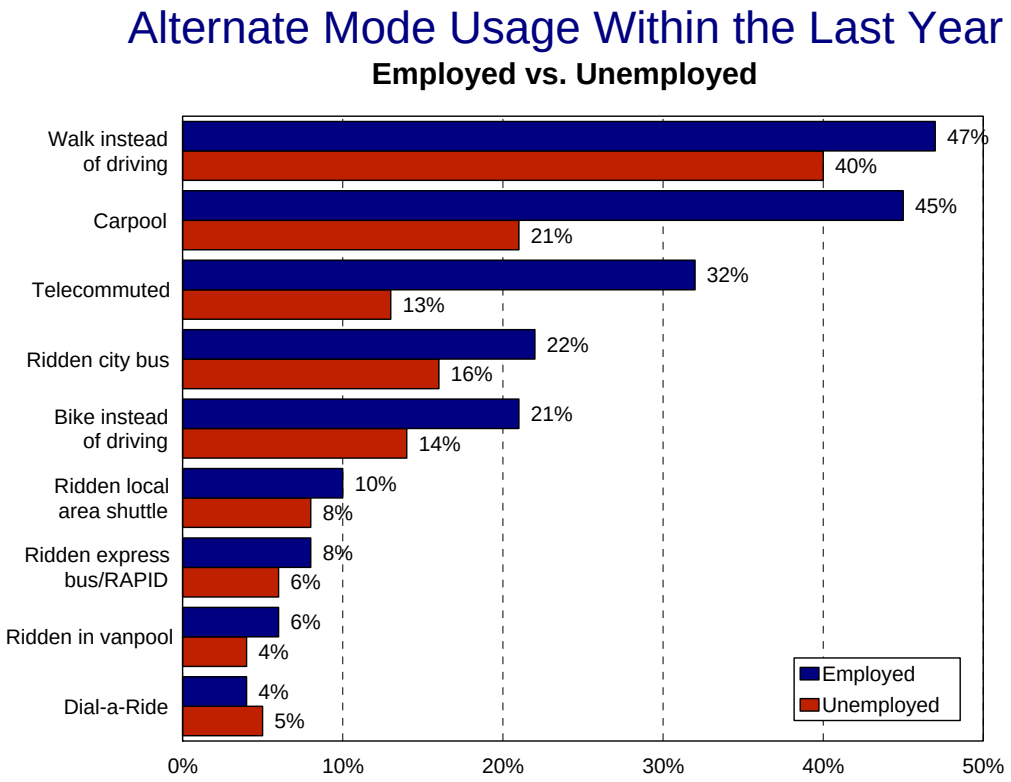
Q11: I am going to list the various alternatives to driving a vehicle, please tell me when was the last time you used that mode, if ever.

Table 12a: Alternate Mode Usage – Past Year Focus

	2007 Past Year	2006 Past Year	2005 Past Year	2003 Past Year
Walk instead of driving	44%	42%	39%	46%
Carpool***	36%*	21%*	21%	26%
Telecommuted	25%**	17%**	15%	20%
Ridden a city bus	20%	21%	19%	21%
Bike instead of driving	18%	20%	17%	20%
Ridden a Local Area Shuttle	9%	10%	9%	10%
Ridden an express bus/ RAPID	7%	8%	4%	9%
Ridden in a vanpool	5%	4%	3%	7%
Dial-A-Ride	5%	4%	3%	3%

Q11: I am going to list the various alternatives to driving alone. Please tell me when was the last time you used that mode, if ever.
*2006 *30% among employed. **26% among employed*
*2007 *45% among employed. ** 32% among employed*
****Changed from "carpool to work" to "carpool" in 2007*

Employed residents were more likely than non-employed to report carpooling, telecommuting, walking instead of drive, and riding a city bus.



- Residents most likely to have ridden a city bus in the past year were residents living in the central region (29%), residents with household incomes under $50,000 (28%), and residents under age 35 (27%).

- Those most likely to have ridden RAPID and/or an express bus in the past year were those under the age of 35 (12%), residents with a high school education or less (12%), and central region residents (11%).

- Residents living in the central region also were most likely to report having ridden a neighborhood circulator in the past year (13%). Those under age 35 also were more likely than older residents to have used a circulator in the past year (13%).

- Those most likely to report carpooling in the past year were young residents (52% of those under age 35), residents from larger households (50% of those with four or more people in the household), and those who are employed full-time (45%). Residents living in the northwest region were least likely to report carpooling (25% vs. 38% to 41% of those living in other regions.

- Residents most likely to indicate they had telecommuted in the past year were residents who live in the northeast region (37%), those with a college degree (36%), residents between the ages of 35 to 54 (35%), and those with household incomes of more than $50,000 (29%).

- Those most likely to have used Dial-a-Ride in the past year residents who make less than $50,000 per year (9% vs. 2% of those earning more).

- Males were more likely than females to indicate they have ridden a bike (for non-exercise purposes) instead of driving alone in the past year (24% vs. 13% of females), as were those who live in the southeast region (23%).

- Those most likely to indicate they had walked for trips instead of driving alone in the past year were those living in the southeast, central, and northeast regions (45% to 47%) and those with an income of less than $50,000 per year (54%).

Table 12b: Alternate Mode Usage
Northwest Region

Mode	2003 Past Year	2005 Past Year	2006 Past Year	2007			
				2007 Past Year	Year Ago +	Never	Don't know
Walk instead of driving	37%	34%	38%	34%	15%	50%	1%
Bike instead of driving	13%	19%	21%	15%	13%	71%	1%
Carpooled to work	16%	18%	18%	25%	16%	59%	-
Ridden a city bus	15%	16%	12%	13%	33%	53%	1%
Telecommuted	12%	13%	13%	18%	11%	70%	1%
Ridden a Local Area Shuttle	8%	5%	6%	5%	1%	93%	-
Ridden an express bus/RAPID	8%	4%	7%	5%	7%	87%	1%
Dial-A-Ride	3%	4%	4%	4%	8%	88%	-
Ridden in a vanpool	4%	3%	9%	4%	10%	86%	-

Table 12c: Alternate Mode Usage
Southwest Region

Mode	2003 Past Year	2005 Past Year	2006 Past Year	2007			
				2007 Past Year	Year Ago +	Never	Don't know
Walking instead of driving	41%	32%	31%	24%	10%	66%	-
Bike instead of driving	33%	24%	18%	14%	12%	74%	-
Carpooled to work	17%	14%	35%	40%	10%	50%	-
Ridden a city bus	14%	14%	10%	10%	32%	58%	-
Telecommuted	10%	12%	24%	22%	6%	70%	2%
Ridden a Local Area Shuttle	9%	2%	-	6%	4%	90%	-
Ridden an express bus/RAPID	8%	4%	2%	8%	8%	82%	2%
Dial-A-Ride	7%	4%	6%	2%	6%	90%	2%
Ridden in a vanpool	2%	2%	6%	2%	6%	90%	2%

Table 12d: Alternate Mode Usage
Northeast Region

Mode	2003 Past Year	2005 Past Year	2006 Past Year	2007			
				2007 Past Year	Year Ago +	Never	Don't know
Walk instead of driving	53%	44%	52%	45%	10%	45%	-
Bike instead of driving	22%	20%	16%	23%	21%	56%	-
Carpooled to work	19%	14%	12%	41%	19%	40%	-
Ridden a city bus	20%	12%	10%	13%	25%	61%	-
Telecommuted	10%	12%	14%	37%	7%	56%	-
Ridden a Local Area Shuttle	18%	10%	10%	8%	5%	85%	1%
Ridden an express bus/RAPID	8%	4%	6%	5%	5%	90%	-
Dial-A-Ride	8%	2%	2%	3%	1%	96%	-
Ridden in a vanpool	3%	-	2%	4%	5%	91%	-

Table 12e: Alternate Mode Usage
Southeast Region

Mode	2003 Past Year	2005 Past Year	2006 Past Year	2007			
				2007 Past Year	Year Ago +	Never	Don't know
Walk instead of driving	50%	36%	41%	24%	10%	66%	-
Bike instead of driving	26%	23%	22%	23%	20%	57%	-
Carpooled to work	24%	16%	20%	38%	16%	46%	-
Ridden a city bus	21%	14%	18%	15%	31%	54%	-
Telecommuted	17%	11%	19%	26%	9%	63%	2%
Ridden a Local Area Shuttle	13%	8%	8%	7%	6%	87%	-
Ridden an express bus/RAPID	9%	4%	6%	4%	12%	83%	1%
Dial-A-Ride	4%	2%	2%	3%	6%	91%	-
Ridden in a vanpool	8%	1%	2%	5%	8%	87%	-

Table 12f: Alternate Mode Usage
Central Region

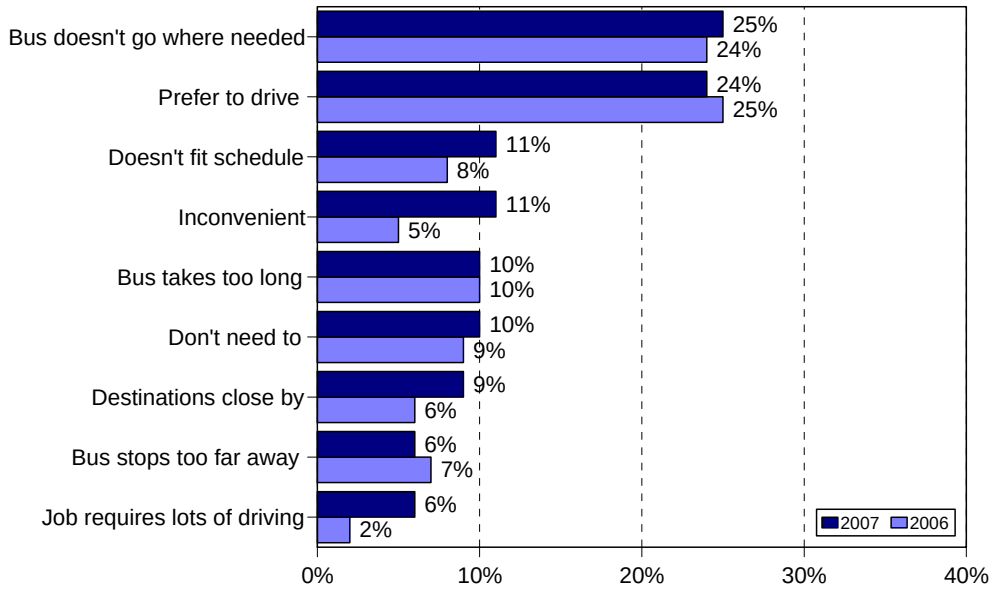
Mode	2003 Past Year	2005 Past Year	2006 Past Year	2007			
				2007 Past Year	Year Ago +	Never	Don't know
Walk instead of driving	48%	41%	44%	46%	14%	38%	2%
Bike instead of driving	32%	32%	17%	14%	28%	56%	2%
Carpooled to work	33%	23%	26%	37%	17%	44%	2%
Ridden a city bus	23%	20%	33%	29%	36%	33%	1%
Telecommuted	23%	16%	18%	23%	7%	67%	3%
Ridden a Local Area Shuttle	10%	13%	15%	12%	5%	82%	1%
Ridden an express bus/RAPID	11%	6%	10%	11%	17%	71%	1%
Dial-A-Ride	3%	4%	5%	7%	4%	87%	2%
Ridden in a vanpool	10%	4%	3%	6%	5%	87%	2%

B. Reasons for Not Using Public Transit

Those who have not used transit or carpooled within the past year were asked to list the reasons why they do not use those modes. As seen in previous years, **the primary reasons given for driving alone instead of using transit or carpooling is the belief that the bus does not go where they need to go (25%) and a preference for driving (mentioned by 24%).** Other inconvenience factors associated with bus usage focused on limitations of the service such as: its generally inconvenient (11%), the bus takes too long (10%), bus stops are too far away (6%), and the service isn't frequent enough (3%). Approximately one in ten residents indicated they do not use the bus or carpool because the service does not fit their schedule (11%) or because "they don't need to" (10%).

Primary Reasons for NOT Using Transit or Carpooling

What are the primary reasons why you don't use public transit or carpool? What else



Among those who did not report using transit or carpooling; n=256

Table 13: Reasons for Not Using Public Transit/Carpool
(Among those who have not used transit or carpool in the past year)

Reasons	2007* (n=256)	2007 Regions				
		NW (n=48)	SW (n=27)	NE (n=38)	SE (n=77)	Central (n=69)
Personal Circumstance						
I prefer to drive my own car	24%	25%	26%	26%	26%	20%
Doesn't fit schedule/varies	11%	12%	15%	3%	16%	9%
Don't need to	10%	17%	4%	5%	14%	3%
Destinations are close by	9%	10%	7%	8%	5%	12%
Job requires car/driving	6%	2%	-	8%	8%	7%
Work from home	4%	2%	4%	10%	3%	3%
Have disability/too old	3%	-	-	3%	3%	6%
Don't know how to use bus system	3%	6%	-	-	3%	1%
Have kids/drive kids	2%	-	-	-	3%	4%
Too hot/heat/weather	2%	2%	-	5%	-	3%
Not comfortable with people on bus	1%	-	-	3%	1%	1%
Other transportation available	1%	-	-	-	-	4%
Transit/Carpool limitations						
The bus doesn't go where I need to go	25%	27%	48%	32%	25%	20%
Inconvenient (general)	11%	12%	-	10%	10%	12%
Riding the bus takes too long	10%	19%	11%	10%	5%	10%
The bus stops too far away	6%	4%	11%	10%	8%	4%
Bus service isn't frequent	3%	2%	4%	5%	3%	1%
Buses aren't safe	2%	-	-	6%	1%	3%
Buses aren't dependable	1%	-	-	-	1%	3%
Too many transfers/change buses	1%	-	7%	-	1%	1%
Expensive/not cost effective	1%	-	-	3%	1%	-
Other	5%	6%	7%	3%	3%	6%
Don't know	2%	2%	-	-	1%	4%

Q12: What are the primary reasons why you don't use public transit or carpool? What else?
**Weighted data*

V. Propensity to Use Public Transit

A. Propensity to use Various Transportation Alternatives

Residents were asked to rate their likelihood to use any one of seven types of public transportation using a one to five scale where "1" meant "not at all likely" and "5" meant "very likely." **In general, there was little change in residents' perceptions concerning their likelihood to use public transit options. As seen in previous years, residents were most likely to consider using sporting and/or special event shuttles (49%) or the future light rail service (39%).** Approximately one in five residents indicated they would consider using some time of bus service – local city bus (23%), Express or RAPID bus (23%), limited stop bus or a neighborhood circulator (both 22%).

Table 14a: Likelihood to Use Public Transportation Options
(Sum 4+5 ratings; "5" = "very likely" to use type of public transportation)

Transit Options	**2007 (n=502)**	2006 (n=504)	2005 (n=507)	2003 (n=1044)
NET 4+5 to **ANY** transit option	**72%**	70%	na	na
Sporting/special event shuttles	**49%**	41%	54%	na
Light rail service	**39%**	36%	52%	56%
Neighborhood circulators	**22%**	32%	32%	32%
Local city bus service	**23%**	26%	38%	39%
Express bus/RAPID	**23%**	25%	42%	40%
Limited stop LOCAL bus svc.	**22%**	24%	39%	na
Dial-a-ride service	**14%**	16%	28%	29%

Q13: Please indicate how likely you would be o use each of the following types of public transportation. Use a scale of 1 to 5 where a "1" means "not at all likely" and a "5" means "very likely."

- Central region residents were more likely than those living in other outlying regions to indicate likelihood to use local bus service (29% vs. 16% to 21%), Express/RAPID bus service (31% vs. 16% to 24%), or Dial-a-Ride service (18% compared to 8% to 14%).

- Northwest area residents provide the lowest ratings for likelihood to use light rail service when it opens (19% likely compared to 28% to 46% for other regions) and also are least likely to indicate they would use limited-stop local bus service (15% vs. 21% to 28%).

Table 14b: Likelihood to Use Public Transportation Options By Region
(Sum 4+5 ratings; "5" = "very likely" to use type of public transportation)

Transit Options	2007* (n=502)	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
NET 4+5 to **ANY** transit option	72%	66%	58%	68%	73%	75%
Sporting/special event shuttles	49%	43%	42%	52%	55%	46%
Light rail service	39%	20%	28%	37%	41%	46%
Neighborhood circulators	22%	20%	22%	23%	20%	24%
Local city bus service	23%	18%	24%	16%	21%	29%
Express bus/RAPID	23%	13%	24%	16%	22%	31%
Limited stop LOCAL bus svc.	22%	15%	28%	25%	21%	24%
Dial-a-ride service	14%	8%	14%	13%	11%	18%

**Weighted data*

- With the exception of Dial-a-Ride, younger residents (i.e., those under age 35) generally gave higher likelihood-to-use ratings than older residents for most of the transit options presented, particularly local bus service (29% vs. 21% for those older). The same is true for residents with household incomes under $50,000.

- Women were significantly more likely than men to indicate they would use a neighborhood or business circulator service (26% vs. 17%).

- Residents most likely to report that they would use light rail when it opens are those between the ages of 35 and 54 (46% compared to 37% for those younger and 32% for those older).

- Employed residents were significantly more likely to say they were willing to use a sporting/special events shuttle than residents who are not employed (56% vs. 38%). Residents ages 35 to 54 also are more likely than older residents to indicate they would consider using a sporting/special events shuttle (54% vs. 43%).

- Residents with an income of less than $50,000 are most likely to indicate that they would be willing to consider using Dial-A-Ride services (21% compared to 11% for those who make more).

B. Circumstances for Consideration of Public Transit

Valley residents were asked to indicate the circumstances that might cause them to consider using public transit. As in the past, **residents most often indicated they would consider using public transit 'if their car broke down or if they did not have a car to use' (30%; see Table 15).** Others will only use public transit if it becomes more convenient – if it was available in their area or went where they needed to go (15%), was generally more convenient and easier to use (11%), and had more convenient stops and locations (7%). It is important to note that residents appeared to be open to considering transit if it was more convenient or easier in general. This response differs from responses in previous years that reference convenience related to availability of service or closeness of stops – this is a more generic "wish" statement, perhaps indicating these residents had looked into taking the bus but could not find a way to make it work for them.

Residents living in the northeast, northwest and southeast regions were more likely than others to indicate they would be likely to consider public transit if it went where they were going or came out as far as they needed (19%, 18% and 17%, respectively).

Table 15: Circumstances for Consideration of Public Transit
Total Mentions

Responses	**2007 Total (n=502)**	2006 Total (n=504)	2005 Total* (n=507)	Non–rider 2004 (n=252)	Non-rider 1999 (n=292)
If car broke down/did not have car/lost license/can't drive/emergency	**30%**	31%	32%	14%	8%
Available in my area/closer to home/goes where I'm going	**15%**	15%	7%	14%	5%
More convenient/easier/ more efficient/ fit schedule	**11%**	-	-	-	-
More convenient stops/ locations	**7%**	12%	12%	6%	na
Service to sporting events/ downtown	**6%**	4%	3%	3%	-
Get places in same amount of time/ or faster	**5%**	5%	6%	25%	18%
Saved rider money/gas prices keep increasing	**5%**	4%	7%	6%	1%
Rail instead of bus/light rail working	**4%**	1%	4%	3%	10%
If I had to go long distances	**4%**	-	-	-	-
Increased bus frequency	**2%**	4%	1%	-	-
No transfers	**2%**	3%	3%	6%	15%
Limited stop service	**2%**	2%	4%	2%	7%
If I needed to go somewhere/ commute	**2%**	2%	-	-	-
Already ride bus/consider it	**3%**	2%	2%	-	-
If did not need car for work	**2%**	2%	1%	-	-
If I had info. about system	**2%**	-	-	-	-
Evening service	**1%**	1%	3%	1%	16%
If it were dependable/reliable	**2%**	1%	2%	3%	11%
Would not ride under any circumstance	**8%**	9%	7%	na	na
Other	**16%**	22%	12%	na	na
Don't know	**14%**	9%	12%	na	na

*Q14: Under what circumstances would you be willing to consider using public transit? What else? * Prior to 2005 responses were among those indicating a "very good," "good," or "fair" chance of using transit in the future.*

VI. Media Usage

A. Likely Source of Information about Transit System

The Internet continues increase as the most common resource that Valley residents would use to find information about riding the bus (general Internet mentioned by 60% and www.valleymetro.org mentioned specifically by 7%). The other two sources most commonly cited as possible sources of information about the local transit system were to call Valley Metro's advertised number (19%) or look at the yellow pages (16%). One in fifteen (6%) indicated they would look at the Bus Book. The Internet was particularly popular among employed residents (72%), younger residents (70% of those under age 55), residents with at least some college (68%), and those with household incomes over $50,000 (71%).

Residents most likely to reference using the yellow pages were older residents (22% of those over 55 vs. 13% for those younger) and the unemployed (20% vs. 13%), as were those who said they were most likely to use the telephone (26% of those 55 or older vs. 18%; 28% unemployed vs. 16% unemployed).

Table 16a: Source of Information about Transit System

Source	**2007 (n=502)**	2006 (n=504)	2005 (n=507)	2003 (n=1044)
Internet (general)	60%	46%	44%	23%
Call advertised number/ Valley Metro	19%	22%	32%	24%
Yellow pages	16%	16%	20%	14%
www.valleymetro.org	7%	-	-	-
Bus Book	6%	7%	6%	17%
Friends/family member	5%	2%	2%	5%
Newspaper	4%	3%	4%	6%
Call information/411	2%	-	-	-
Call the city	2%	-	-	-
Library	2%	1%	2%	3%
At work	2%	3%	2%	2%
Bus stops/ shelters	1%	2%	2%	5%
Television	1%	1%	1%	2%
Other*	5%	8%	6%	5%
Don't know	6%	11%	8%	14%

*Q16: If you wanted information about using public transportation in the Valley or carpool/vanpool assistance, how would you go about getting information? How else? * Indicated less than 1% consensus.*

Table 16b: Source of Information about Transit System by Region

Source	2007* (n=502)	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Internet (general)	60%	63%	46%	63%	61%	59%
Call advertised number/ Valley Metro	19%	21	14%	18%	16%	22%
Yellow pages	16%	18%	24%	9%	16%	17%
www.valleymetro.org	7%	4%	4%	12%	6%	7%
Bus Book	6%	5%	12%	4%	6%	8%
Friends/family member	5%	-	4%	5%	9%	3%
Newspaper	4%	1%	6%	7%	6%	4%
Call information/411	2%	-	2%	3%	1%	3%
Library	2%	-	-	5%	3%	1%
At work	2%	1%	-	3%	3%	3%
Call the city	2%	1%	-	1%	2%	3%
Call the Chamber	1%	1%	-	1%	-	1%
Bus stops/ shelters	1%	1%	-	4%	1%	1%
Television	1%	-	2%	-	1%	1%
Other**	5%	5%	-	5%	5%	4%
Don't know	6%	4%	12%	8%	4%	8%

**Weighted data. ** Indicated less than 1% consensus.*

B. Most Effective Communication Method

As in previous years, more than one-fourth of Valley residents indicated the best way for Valley Metro to communicate information to local residents about the public transit system is through a direct mail piece (22% first mentions; 28% total mentions). Television (18% first mentions, 28% total mentions), the Internet (21% first mentions; 25% total mentions), the newspaper (13% first mentions; 19% total mentions), and radio (4% first mentions; 10% total mentions) are also mentioned as effective communication methods.

Females were more likely than males to indicate a preference for direct mail (27% vs. 16%). Those under age 55 (23% vs. 16% of those age 55 or older) and residents with at least some college education (23% vs. 12% of those with a high school degree or less) were more likely to cite the Internet as the most effective method for communicating about transit services. Males (7% vs. 2%) and employed residents (6% vs. 2%) were more likely than others to suggest the radio.

Table 17a: Most Effective Communication Method
Comparison of 1st & Total Mentions

	FIRST Mentions		TOTAL Mentions	
Method	**2007** (n=502)	2006 (n=504)	**2007** (n=502)	2006 (n=504)
Direct mail	**22%**	22%	**28%**	27%
Television	**18%**	19%	**28%**	28%
Internet/ e-mail	**21%**	16%	**25%**	20%
Newspaper	**13%**	16%	**19%**	22%
Radio	**4%**	2%	**10%**	8%
Billboards	**2%**	-	**4%**	-
Information at work	**2%**	1%	**3%**	2%
Information on buses	**1%**	1%	**3%**	2%
Flyers	**-**	1%	**2%**	1%
Telephone	**2%**	-	**2%**	-
Media (general)	**1%**	-	**2%**	-
Bus shelters	**1%**	1%	**1%**	2%
Brochure	**1%**	-	**1%**	-
Bill inserts	**1%**	-	**1%**	-
Library	**1%**	-	**1%**	-
Bus Book	**-**	1%	**1%**	2%
Other	**2%**	6%	**3%**	8%
Don't know	**10%**	14%	**10%**	14%

Q17: What would be the best way for Valley Metro to inform you about the services it offers to Valley residents?

Table 17b: Most Effective Communication Method
Total Mentions By Region

	2007 Total* (n=502)	2007 Regions				
		NW (n=76)	SW (n=50)	NE (n=75)	SE (n=141)	Central (n=160)
Direct mail	**28%**	20%	26%	25%	31%	30%
Television	**28%**	30%	30%	20%	23%	32%
Internet/ e-mail	**25%**	30%	18%	35%	30%	16%
Newspaper	**19%**	20%	20%	21%	21%	16%
Radio	**10%**	5%	12%	12%	6%	13%
Billboards	**4%**	4%	8%	1%	6%	2%
Information at work	**3%**	3%	-	3%	2%	3%
Information on buses	**3%**	1%	8%	5%	1%	3%
Flyers	**2%**	3%	4%	3%	2%	2%
Telephone	**2%**	4%	-	3%	1%	2%
Media (general)	**2%**	-	-	3%	1%	2%
Bus shelters	**1%**	-	-	1%	1%	1%
Brochure	**1%**	3%	2%	1%	-	1%
Bill inserts	**1%**	-	-	1%	1%	2%
Library	**1%**	-	-	3%	1%	-
Bus Book	**1%**	3%	2%	-	1%	1%
Other	**3%**	4%	6%	4%	-	4%
Don't know	**10%**	13%	12%	8%	10%	11%

*Q17: What would be the best way for Valley Metro to inform you about the services it offers to Valley residents? *Weighted data.*