

**Valley Metro
Non-Rider Survey Results 2015**

Spring 2015

for



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Executive Summary

This report presents the results of a telephone survey of residents living in Maricopa County conducted by WestGroup Research. The purpose of the telephone survey is to assess perceptions toward public transportation in the Valley among residents ages 18 to 69 who do not currently use any form of public transportation.

The interviews were conducted between May 11th and June 10th, 2015. Results are based on 500 telephone interviews conducted with 249 male and 251 female residents. Quotas were set to target 50% male and 50% female, as well as a representative distribution by age of respondent. The survey took approximately 11 minutes to complete. The total sample has a margin of error of $\pm 4.3\%$.

Perceptions of Valley Metro

- Non-riders were most likely to perceive the Valley Metro public transportation system as needing expansion (20%) and as generally being good/having good service (19%). When asked for their perception of the system, 15% simply responded that they “do not use transit.”
- More than two-thirds (69%) of non-riders hold a favorable view of Valley Metro and its services; with one-fourth reporting their perception as “very favorable.” While 17% reported having an unfavorable opinion (9% not very + 8% not at all), nearly as many reported having no opinion of Valley Metro or the services it provides (14% don’t know).
 - Non-riders who rated their perception of Valley Metro and the services it provides as “very” or “somewhat favorable,” said they did so because public transit is good/important for those without transportation (16%), they have heard good things about it (15%), believe the service to be good (13%), and convenient (10%).
 - Non-riders who rated their perception of Valley Metro and the services it provides as “not very” or “not at all favorable,” primarily say it is because transit service needs to be expanded (37%) and their perception that it is inconvenient, time consuming, and difficult to use (22%).

Reasons Do Not Use/Reasons to Consider Use

- Over one-half of non-riders (53%) choose not to use public transportation because they prefer to drive their own car. The top complaints about public transportation itself were that it is inconvenient/inefficient and inaccessible (21%) or that service is not available to them (17%).
- Saving money (42%), helping the environment (39%), and reducing congestion (23%) were the top three benefits non-riders offered as good reasons for people to consider public transportation. In addition to the 17% who mentioned the necessity of public transportation for people without cars, some felt using transit may be convenient (13%) and allow people to avoid driving stress (14%).



- Nearly one in five (19%) non-riders reported there is a “very good” (8%) or “good” (11%) chance they will use some kind of public transportation in the future. The likelihood of trying transit in the future increases to 39% if you include those who said there is a “fair chance” (20%). Nearly one-third (31%) maintained there is “no chance” they will ever use any kind of public transportation.
 - The majority (85%) of those with some chance of using public transportation in the future selected Light Rail as the service they would be most likely to try. Nearly one-half (46%) expressed a potential interest in trying out a local bus. Two in five (40%) thought they would be likely to try Dial-A-Ride. While just over one-third (36%) would be likely to try an express bus, slightly fewer (25%) were attracted to riding a neighborhood circulator.
 - Inconvenient (33%) or unavailable/insufficient transit service (19%) were the two primary reasons given by non-riders for asserting there was little to no chance they would ever use public transportation. Nearly one in five (17%) expressed their need or desire for flexibility as their reason. While 16% simply prefer other transportation options (primarily their own car –12%), others report they just do not have a need to use it.
- When asked to name three features or amenities that would appeal to non-riders, the primary response was related to the more basic idea of expanding service (42% NET), which included both the geographic service area (34%) and the frequency and hours of service (18%). Approximately one in ten made suggestions related to improving the comfort of public transportation (10%) and increasing the convenience of using transit (8%).
 - Of importance, a full one-third (33%) could not think of anything to suggest that Valley Metro could add to its current transit service that would make it appealing for the respondent or people like the respondent. An additional 8% noted there was nothing that would make it appealing and that they would not use it under any circumstances.

Value of Public Transportation

- Non-riders were most likely to name people without cars (28%), everyone/the public (20%), poor or low income residents (16%), and people who do not drive (12%) as those benefitting most from public transportation in the Valley. When combined together, 11% of non-riders view residents living or working in downtown Phoenix or in urban or inner-city areas as the ones benefitting from transit. Just under one in ten mentioned business people, students and the elderly.
- Nearly two-thirds (63%) to 80% indicated agreement with each of the five value statements evaluated. Non-riders were most likely to agree *public transportation supports a reduction in air pollution/reduces our carbon footprint* (80%). Approximately three in four agreed that *public transportation removes vehicles from the road making them less congested, helps people save money and benefits the local economy*. Just under two-thirds agreed *transit helps bring more jobs to the Valley*.



Best Way to Communicate Valley Metro Information

- The top five communication methods recommended for informing non-riders about services offered by Valley Metro were: television (29%), direct mail (22%), email (18%), newspapers (15%) and the Valley Metro website (13%). While a myriad of other methods were suggested – social media, radio, billboards, etc. – none were suggested by more than 8%.

Conclusions

1. Non-riders primarily have a favorable perception of the public transportation system in the Valley and believe that it mostly benefits those without access to or ability to travel by personal vehicle. The system serves a purpose for “other” Valley residents; although a small portion does believe that “everyone” benefits.
2. Although perceptions toward the system in general are favorable, non-riders believe the system needs to be expanded in order to have increased appeal for residents like themselves. The primary expansion needed is geographical, so that the system is reachable for residents in all parts of the metro area. Despite a question that tried to focus on amenities and features of public transit that would increase their likelihood to use it, non-riders really did not offer anything of much significance beyond more service.
3. Overall, very few non-riders believe they will use public transportation in the future and those who would consider it primarily see themselves using the light rail. Those who report “little” or “no chance” of ever using transit once again criticized the lack of convenient and available/sufficient service.
4. Non-riders are more likely to agree to the environmental benefits of public transportation than the financial or economic benefits for individuals or businesses. This was also supported in the recently completed value of transit focus groups. Even though those occasional and non-users found the financial claims from the Valley Metro advertisements intriguing and potentially motivating, they frequently expressed skepticism about the ability of residents to actually achieve the reported savings.
5. Traditional methods of communication – television, direct mail and newspapers – are reported as the “best” ways for Valley Metro to communicate with these residents. They are not as interested in finding materials from Valley Metro in the digital environment.



I. Introduction

A. Background and Methodology

This report presents the results of a telephone survey of Maricopa County residents conducted by WestGroup Research. The purpose of the telephone survey is to assess perceptions toward public transportation in the Valley among residents ages 18 to 69 who do not currently use any form of public transportation.

The interviews were conducted between May 11th and June 10th 2015. Results are based on 500 telephone interviews conducted with 249 male and 251 female residents. Quotas were set to target 50% male and 50% female, as well as a representative distribution by age of respondent. The survey took approximately 11 minutes to complete. The total sample has a margin of error of $\pm 4.3\%$. While surveys with the non-rider population have been conducted in the past for Valley Metro, the questions in the 2015 study are worded differently or open-ends are coded differently thus comparisons to prior results are not appropriate from a statistical perspective. Significant differences between demographic and geographic subgroups are discussed where appropriate.

B. Sampling and Margin of Error

There is a certain amount of sampling "error" that occurs with survey research because of the variability that is present whenever a portion of a population is examined to provide insight into the attitudes, opinions, and behaviors of the total population. This "error" reflects the likelihood that the estimates derived from interviewing a sample of the population differ from the numbers that would be obtained if the entire population were interviewed. Based on the total sample size of 500, the sampling error (at the conventional 95% confidence level) is $\pm 4.3\%$. This means that in 19 out of 20 cases, the "actual" percentage will fall within $\pm 4.3\%$ if every qualified member of the population was interviewed. If a response differs by more than this percentage, the difference is said to be "statistically significant." The margin of error for smaller subgroups will be larger (sub-groups by gender, age, ethnicity, etc.)



C. Demographics

The sample is comprised of an even split by gender (50% males and 50% females), and the average age of resident was 46.7 years. A slight majority reported being employed full time.

Table 1: Demographic Characteristics

Characteristic	2015 n=500	Characteristic	2015 n=500
Gender		Employment Status	
Male	50%	Full time	60%
Female	50%	Retired	18%
		Part time	9%
Age		Student	4%
18-24	8%	Stay-at-home parent	3%
25-34	15%	Unemployed	3%
35-44	14%	Refused	5%
45-54	24%		
55-69	32%	Race/Ethnicity	
Refused	7%	White	77%
Average Age	46.7	Hispanic/Latino	12%
Household Income		African American	3%
Less than \$30,000	12%	Asian American	2%
\$30,000 - \$49,999	14%	American Indian	1%
\$50,000 - \$69,999	16%	Other	4%
\$70,000 - \$99,999	16%	Refused	4%
\$100,000 and over	23%		
Refused	20%	Internet Access?	
Language Spoken - Home		Yes	92%
English only	82%	No	5%
English and Spanish	10%	DK/Refused	3%
English and another language	4%		
Some other language only	2%	Own Smartphone?	
Spanish only	*	Yes	82%
Don't know/Refused	2%	No	15%
		DK/Refused	3%
Region (categorized by zip code)			
East	37%		
Central	28%		
West	24%		
Other/Refused	10%		



II. Perceptions of Valley Metro

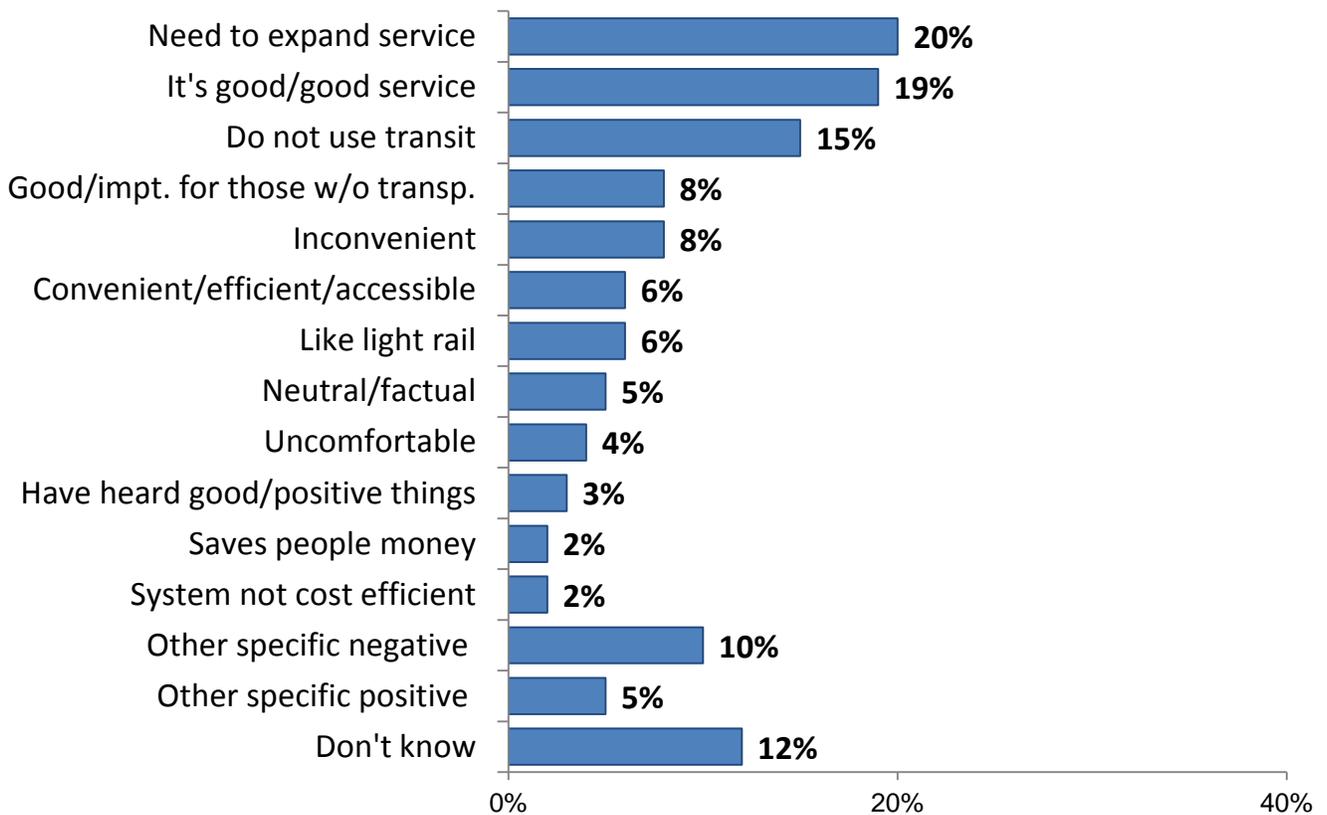
A. Unaided General Impressions

Non-riders were most likely to perceive the Valley Metro public transportation system as needing expansion (20%) and as generally being good/having good service (19%). When asked for their perception of the system, 15% simply responded that they “do not use transit.”

Additional positive perceptions include that it is good/important for those without transportation (8%), it is convenient/efficient/and accessible (6%), they like light rail (6%), they have heard good things (3%), and it saves people money (2%). A few people made other specific positive comments (5%) about the system such as it is improving, clean, safe, etc.

Negative perceptions were that it is inconvenient (8%), uncomfortable (4%), and that the system itself was not cost efficient (2% said it was too expensive or waste of money). An additional 10% specifically referenced negative associations including that is not safe (3%), not as good as transit elsewhere (2%), and blocks traffic (2%).

Perceptions of Valley Metro



Q1. What are your perceptions of the Valley Metro public transportation system?
Total n=500



Older non-riders (ages 35 to 69) were significantly more likely than younger ones (ages 18 to 34) to feel the transit system needs to be expanded (22% vs. 10%). A desire for system expansion was also elevated among West Valley residents (26% compared to 14% to 21% in other areas) and all non-Hispanic minority groups (39% to 57% compared to 18% Caucasians and 14% Hispanics). The youngest non-riders were more likely than older residents to mention aspects of transit that are uncomfortable.

Table 2: Perceptions of Valley Metro

Perception	2015 n=500
Net: Need to expand service	20%
Need to expand service area/geographic location	19%
Need to expand frequency/hours	3%
It's good/good service	19%
I don't use it/have never used it/have other transportation	15%
Net: Other specific negative mentions	10%
Not safe/I don't feel safe	3%
Other cities have better public transit	2%
Blocks traffic/need more pullouts	2%
General negative mention/it's not good/service isn't good	1%
Negative experience	1%
Good/important for those without transportation	8%
Net: Inconvenient	8%
Too slow/takes too long	6%
Inconvenient/not easy to use	2%
Need better connections	1%
Convenient/efficient/accessible	6%
Like the light rail/light rail is convenient	6%
Net: Other specific positive mentions	5%
They are growing/improving/upgrading	1%
Buses/light rail/stops are clean	1%
Dial A Ride is good/heard good things about DAR	1%
It's safe	1%
Helps the environment	1%
Neutral/factual mention	5%
Net: Uncomfortable	4%
Buses are dirty/it's dirty	1%
Too hot to use public transportation	1%
More shade at bus stops	1%
Too crowded	1%
Have heard good things/Positive word of mouth	3%
Not cost efficient for the city (too expensive/waste of money)	2%
Saves money	2%
Don't know	12%

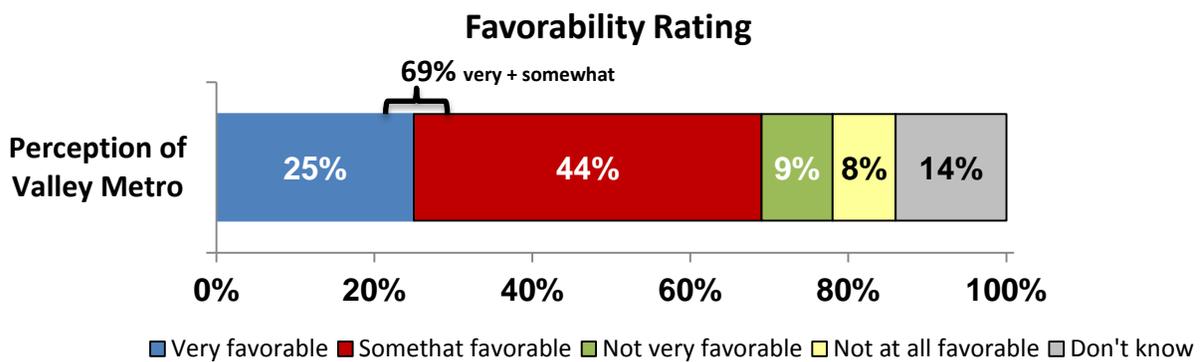
Q1. What are your perceptions of the Valley Metro public transportation system?



B. Favorability of Perception of Valley Metro and its Services

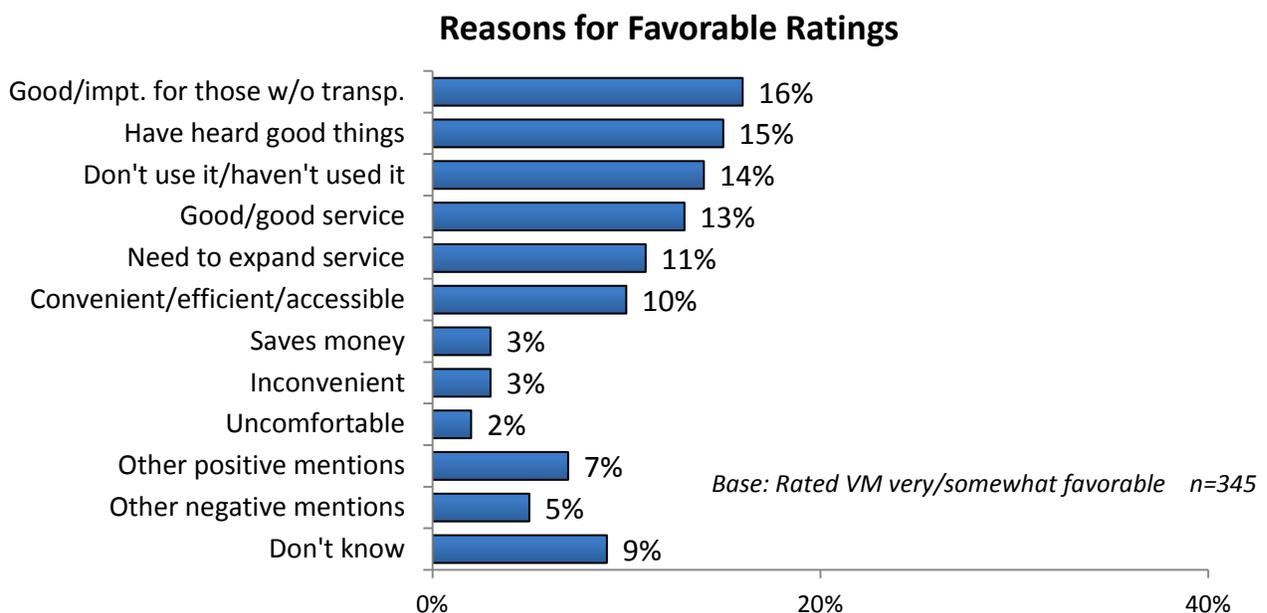
More than two-thirds (69%) of non-riders hold a favorable view of Valley Metro and its services; with one-fourth reporting their perception as “very favorable.” While 17% reported having an unfavorable opinion (9% not very + 8% not at all), nearly as many reported having no opinion of Valley Metro or the services it provides (14% don’t know).

Young non-riders (18 to 34) were significantly more likely than older ones to hold a favorable perception (80% very + somewhat favorable vs. 66% of 35 to 69 year olds). Similarly, favorability is higher among non-riders with lower household incomes (79% <\$50K vs. 66% earning more).



Q2 Overall, would you say your perception of Valley Metro and its services is... n=500

Non-riders who rated their perception of Valley Metro and the services it provides as “very” or “somewhat favorable,” said they did so because public transit is “good” and “important” for those without transportation (16%), they have heard good things about it (15%), believe the service to be good (13%), and its convenient (10%). One in ten (11%) mentioned the need for expansion and 14% reiterated their lack of use/ridership.



Base: Rated VM very/somewhat favorable n=345



Table 3: Reasons for Favorable Rating

Reason	2015 n=345
Good/important for those without transportation	16%
Positive word of mouth	15%
I don't use it/have never used it/have other transportation	14%
It's good/good service	13%
NET Need to expand service	11%
Need expanded area/geographic location	10%
Need expanded frequency/hours	2%
NET Convenient/efficient/accessible	10%
Good routes/covers the area well	5%
User friendly/convenient	2%
Good/frequent schedule	2%
Buses are fast/efficient/on time	1%
Saves money	3%
Inconvenient/slow/takes too long/not easy to use	3%
Uncomfortable	2%
Like the light rail/light rail is convenient	1%
NET Other positive mentions	7%
Reduces congestion	2%
Buses/light rail/stops are clean	1%
Park and rides are helpful	1%
They are growing/improving/upgrading	1%
Courteous/polite drivers	1%
It's safe	1%
Helps the environment	1%
NET Other negative mentions	5%
Not safe/I don't feel safe	1%
Other cities have better transit	1%
Buses break down too much	1%
Blocks traffic/need more pullouts	1%
Negative experience	<1%
Don't know	9%

Q2A. Please explain the reason for your rating



Non-riders who rated their perception of Valley Metro and the services it provides as “not very” or “not at all favorable,” primarily say it is because transit service needs to be expanded (37%; 35% geographically + 2% frequency/hours) and their perception that it is inconvenient, time consuming, and difficult to use (22%). Others feel it is unsafe (8%), not cost effective for the City (7%), and not as good as transit in other cities (4%).

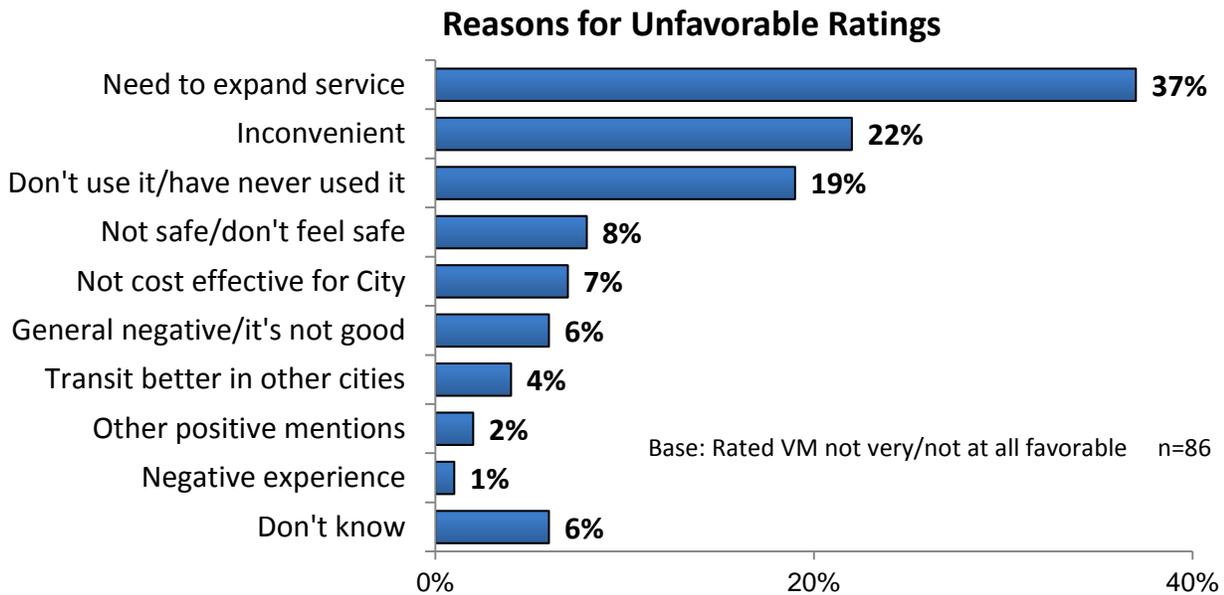


Table 4: Reasons for Unfavorable Rating

Reason	2015 n=86
Net: Need expanded services	37%
Need expanded area/geographic location	35%
Need expanded frequency/hours	2%
Net: Inconvenient	22%
Too slow/takes too long	12%
Inconvenient/not easy to use	10%
Need better connections	2%
I don't use it/have never used it/have other transportation	19%
Not safe/I don't feel safe	8%
Not cost effective for City (waste of money/too expensive)	7%
General negative mention/it's not good/service isn't good	6%
Transit better in other cities	4%
Other positive mentions	2%
Negative experience	1%
Don't know	6%

Q2A. Please explain the reason for your rating.



III. Reasons Do Not Use/Reasons to Consider Use

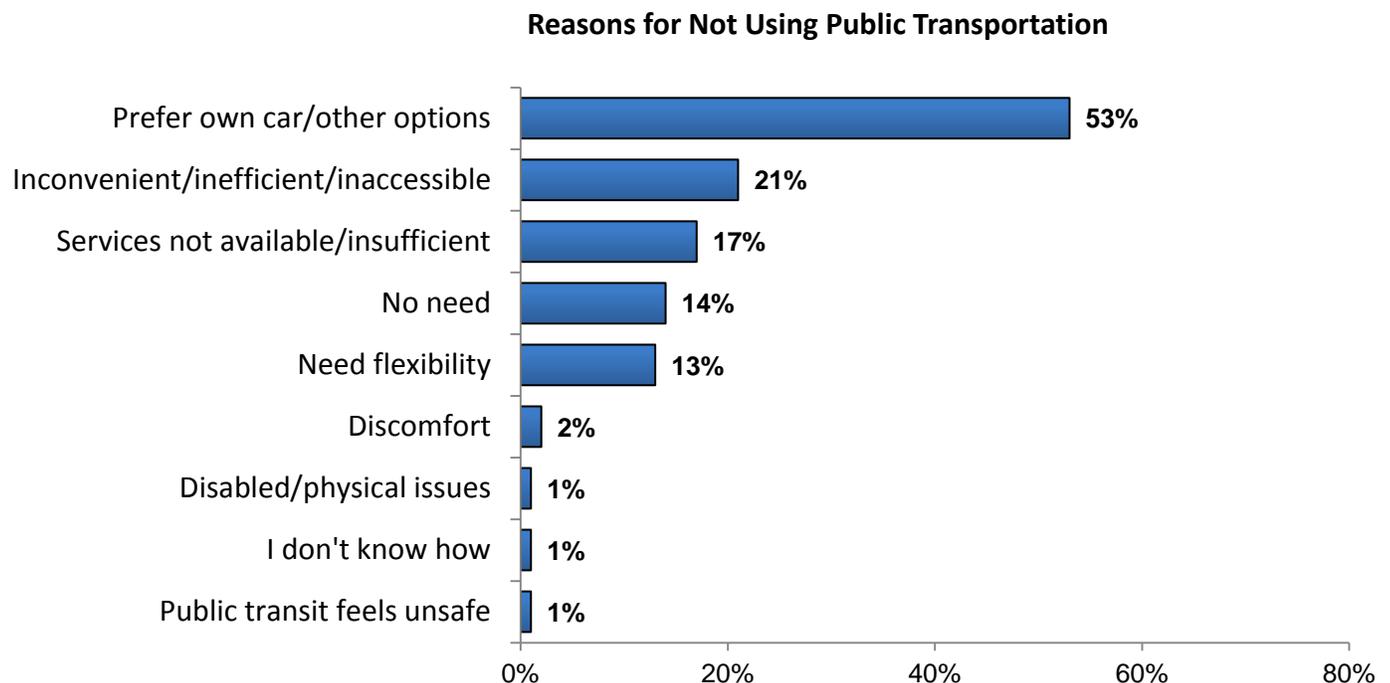
A. Primary Reasons for Not Using Public Transportation

Over one-half of non-riders (53%) choose not to use public transportation because they prefer to drive their own car. This preference is strongest among 18 to 34 year olds (65% vs. 50% ages 35-69).

The top complaints about public transportation itself were that it is inconvenient/inefficient and inaccessible (21%) or that service is not available to them (17%). Inconvenience was mentioned more often among those ages 35 to 54 (29%) and those 55 to 69 (22%) than by the younger group (8% for 18-34 year olds).

While 14% explained that they simply do not have a need for it ('no need', live close to work, work from home, don't travel far, etc.), an additional 13% referenced their need for flexibility and a car so they can come and go as needed, run errands, pick up/drop off kids or use their car for work. Caucasians were twice as likely as Hispanic non-riders to raise the issue of flexibility (15% vs. 7%).

A few mentioned struggles with the discomforts of using transit (hot, crowded, dirty), having physical limitations, not knowing how to use it, and feeling unsafe (mentioned by 1% to 2%).



Q3. What are the primary reasons you choose not to use public transportation in the Valley?

Total n=500



Table 5: Reasons for Not Using Public Transportation

Reason	2015 n=500
Prefer to drive own car	53%
Net: Inconvenient/inefficient/inaccessible	26%
Transit stops too far away	11%
Transit schedule doesn't coincide with my work schedule	6%
Transit is inconvenient (general/unspecified)	5%
Using transit takes too long	5%
Service isn't frequent enough	1%
Net: Services not available/insufficient	17%
Services not available in my area/don't live in the Valley	9%
Transit doesn't go where I need to go	8%
Transit doesn't run at certain times/on weekends	<1%
No need	14%
Net: Need flexibility/need car	9%
Need a car for work	4%
Need to be flexible/control when I come and go	3%
Need a car to take children to/from school/daycare	2%
Need a car for errands	<1%
Net: Discomfort	2%
Uncomfortable around type of people who ride transit	1%
Too hot to use transit	1%
Transit too crowded	<1%
Public transit is dirty	<1%
Carpool/vanpool/car share/telecommute	2%
Disabled/physical issues	1%
I don't know how	1%
Public transit feels unsafe	1%
Can get rides	1%

Q3. What are the primary reasons you choose not to use public transportation in the Valley?

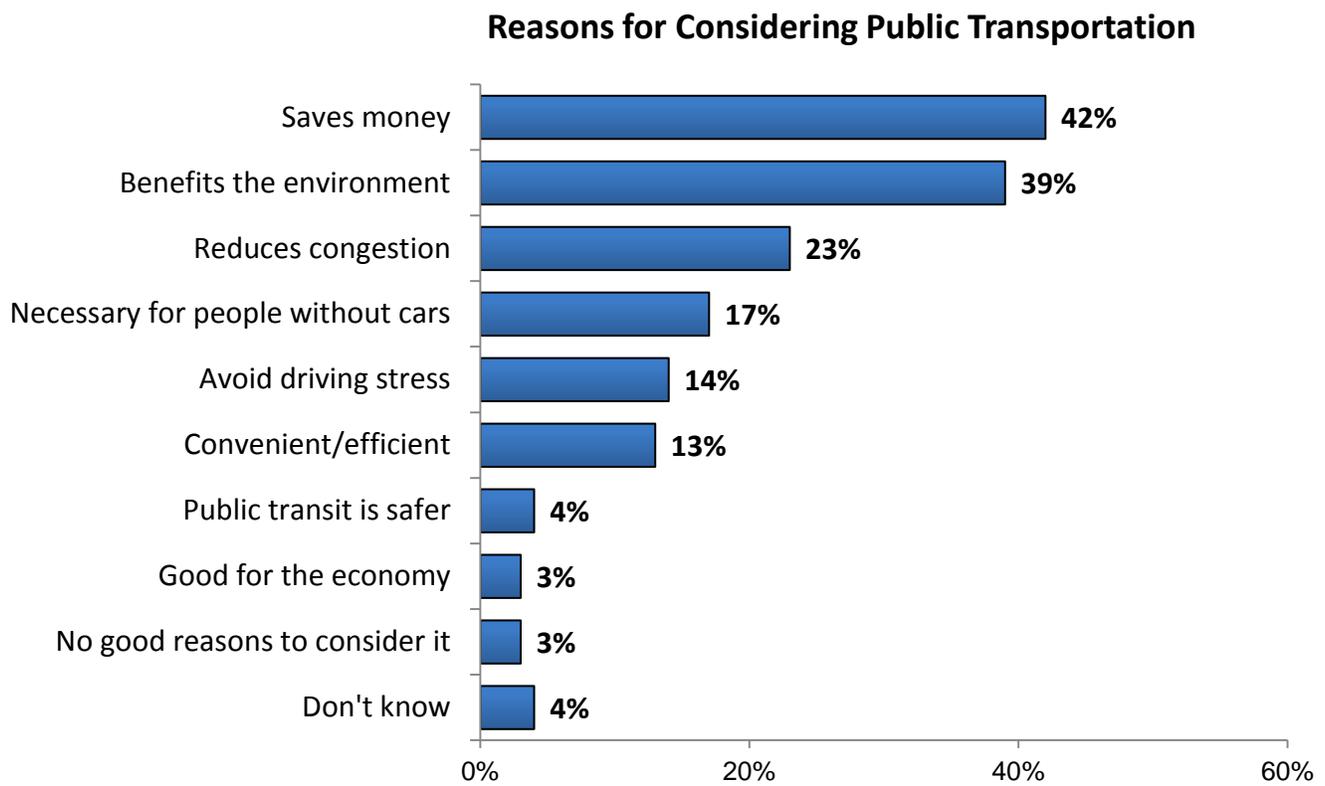


B. Good Reasons to Consider Public Transportation

Saving money (42%), helping the environment (39%), and reducing congestion (23%) were the top three benefits non-riders offered as good reasons for people to consider public transportation. In addition to the 17% who mentioned the necessity of public transportation for people without cars, some felt using transit may be convenient (13%) and allow people to avoid driving stress (14%).

West Valley non-riders were significantly more likely than those in Central Phoenix and the East Valley to suggest *saving money* as a good reason to consider using public transportation (54% vs. 31% and 42%, respectively.)

Women were significantly more likely than men to name the *environment* as a compelling reason to use transit (45% vs. 33%).



Q4: What do you think are good reasons why people should consider using public transportation?

Total n=500



Table 6: Reasons for Considering Public Transportation

Reason	2015 n=500
Net: Saves money	42%
Saves gas money	27%
Cost effective/saves money/cheaper (unspecified)	10%
Saves car wear and tear	4%
Saves on insurance costs	4%
Cheaper than owning a car	4%
Saves on parking costs	1%
Net: Benefits the environment	39%
Improves air quality	38%
Reduces carbon footprint	7%
Conserves energy	1%
Reduces congestion	23%
Necessary for people without cars	17%
Avoid driving stress	14%
Net: Convenient/efficient/accessible	13%
Work/accomplish tasks during ride/commute time	4%
Convenience (unspecified)	4%
No parking hassles	2%
Faster/saves time	1%
Should use if service times/areas are convenient	1%
Accessible/easy to use	1%
Public transportation is safer	4%
Good for the economy	3%
No good reasons to consider public transit	3%
Don't know	4%

Q4: What do you think are good reasons why people should consider using public transportation?



C. Likelihood to Consider Public Transportation in the Future

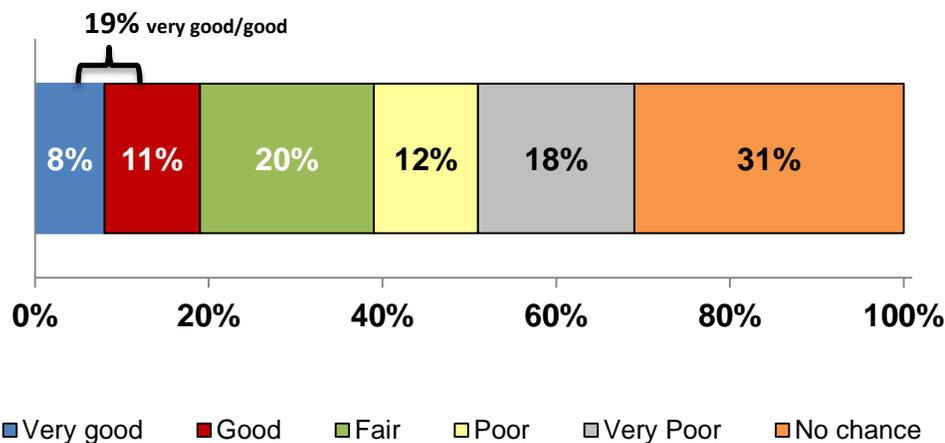
1. Chance of Future Use of Public Transportation

Nearly one in five (19%) non-riders reported there is a “very good” (8%) or “good” (11%) chance they will use some kind of public transportation in the future. The likelihood of trying transit in the future increases to 39% if you include those who said there is a “fair chance” (20%). Nearly one-third (31%) maintained there is “no chance” they will ever use any kind of public transportation.

Hispanic and Black non-riders were significantly more likely than Caucasian non-riders to state there is a very good or good chance they will use public transit it in the future (32% and 43% vs. 15%).

The youngest non-riders (age 18 to 34) were significantly more likely than those who are older to at least express there is *some chance* (very good, good or fair) they will eventually use it (50% vs. 38%). This difference was primarily in the “fair chance” category. In contrast, those ages 35 to 69 were more likely to rate their chances of using transit as none (32% no chance vs. 23% of 18 to 24 year olds). Non-riders with household incomes of \$50K or higher were significantly more likely than those earning less to assert there was “no chance at all” of ever using transit (33% vs. 21%).

Chance of Using Public Transportation in the Future



Q6 What would you say are the chances you will use any type of public transportation (IF NECESSARY: Including local and express bus service, light rail system, neighborhood circulators, RAPID, or Dial-a-Ride or) in the future?

Total n=500



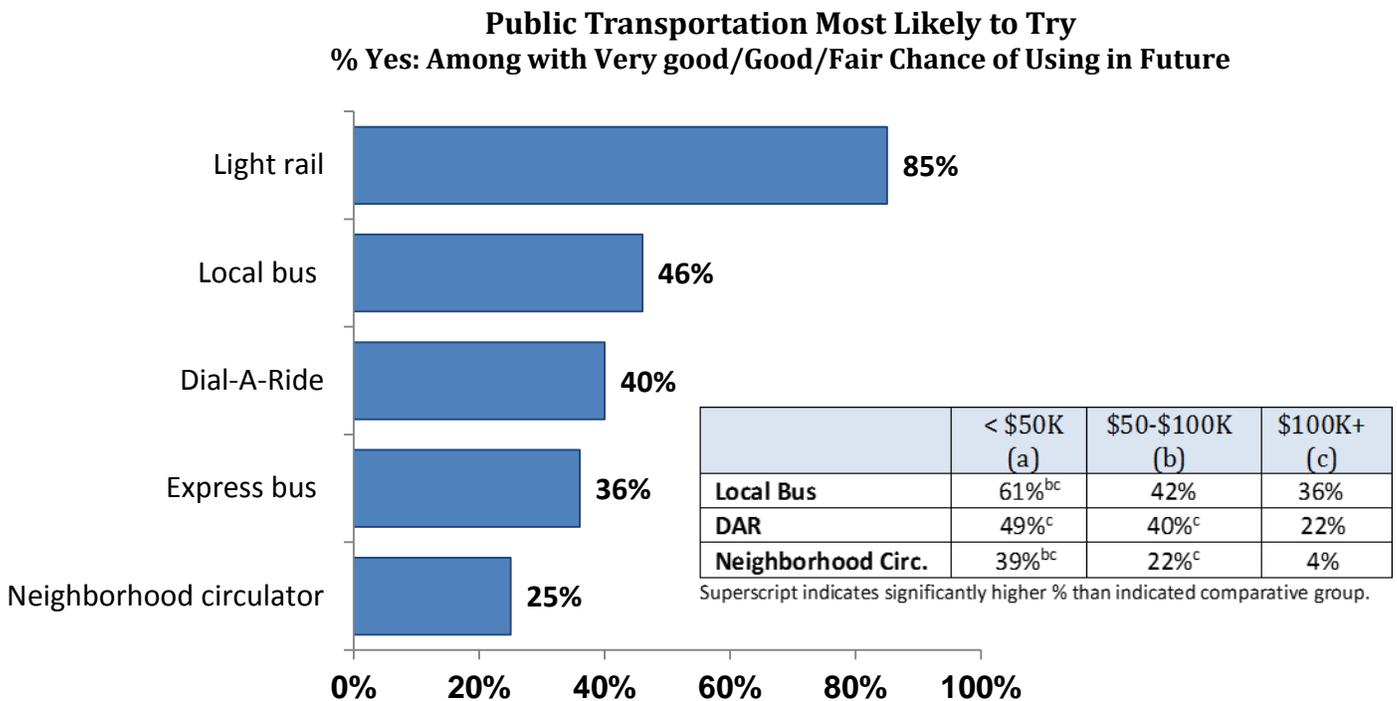
2. Types of Transportation Most Likely to Try

The majority (85%) of those with some chance of using public transportation in the future selected light rail as the service they would be most likely to try. This was an across-the-board majority with no significant demographic differences.

Nearly one-half (46%) expressed a potential interest in trying out a local bus. Hispanic non-riders were significantly more likely than Caucasians to report being likely to try the bus (70% vs. 41%). Those with the lowest household incomes also had a significantly higher likelihood of trying a local bus (see table insert).

Two in five (40%) thought they would be likely to try Dial-A-Ride, and as expected, non-riders ages 55 to 69 were significantly more likely than younger riders to be interested in DAR (54% vs. 32% of younger riders). Women were significantly more likely than men to select Dial-A-Ride (51% vs. 29%). DAR was also a more attractive option to those with household incomes under \$100K (see table insert).

While just over one-third (36%) would be likely to try an express bus, slightly fewer (25%) were attracted to riding a neighborhood circulator, which was more appealing to unemployed non-riders (35%) than those employed full or part time (21%). Interest in taking a neighborhood circulator increases significantly as income decreases (see table insert).



3. *Main Reason Will Not Consider Future Use of Public Transportation*

Inconvenient (33%) or unavailable/insufficient transit service (19%) were the two primary reasons given by non-riders for asserting there was little to no chance they would ever use public transportation. Nearly one in five (17%) expressed their need or desire for flexibility (control over timing, ability to run errands, using car at work) as their reason. While 16% simply prefer other transportation options (primarily their own car –12%), others report they just do not have a need to use it (12% mentioned they work from home, walk to work, do not travel far, etc.).

Table 7: Main Reasons Little or No Chance of Future Use of Public Transportation

Reason	2015 n=307
Net: Inconvenient/inefficient/inaccessible	33%
Using transit takes too long	11%
Transit is inconvenient (general/unspecified)	10%
Transit stops too far away	9%
Transit schedule doesn't coincide with my work schedule	4%
Changed jobs/moved/no longer convenient	2%
Service isn't frequent enough	1%
Net: Unavailable /insufficient	19%
Insufficient area/geographic location	18%
Insufficient frequency/hours	1%
Net: Need flexibility	17%
Need to be flexible/control when I come and go	13%
Need a car for work	3%
Need a car to take children to/from school/daycare	1%
Net: Prefer other transportation options	16%
I prefer to drive my own car	12%
Can get rides	3%
I carpool/vanpool/car share/telecommute	1%
Would rather call taxi	1%
No need (telecommute/walk/do not go far, etc.)	12%
Net: Discomfort	3%
Too hot to use transit	2%
Uncomfortable around type of people who ride transit	1%
Public transit is dirty	1%
I don't know how	2%
Public transit feels unsafe	2%
Disabled/physical issues	1%

Q6b. What would you say is the main reason you say there is little to no chance that you will use public transportation in the future? Q6c. Please tell me more about why you prefer to drive yourself instead of using public transportation. (Those who answered 'prefer my car' were probed for the meaning behind the response and coded into those categories instead).

Base: Q6 Likelihood poor/very poor/no chance



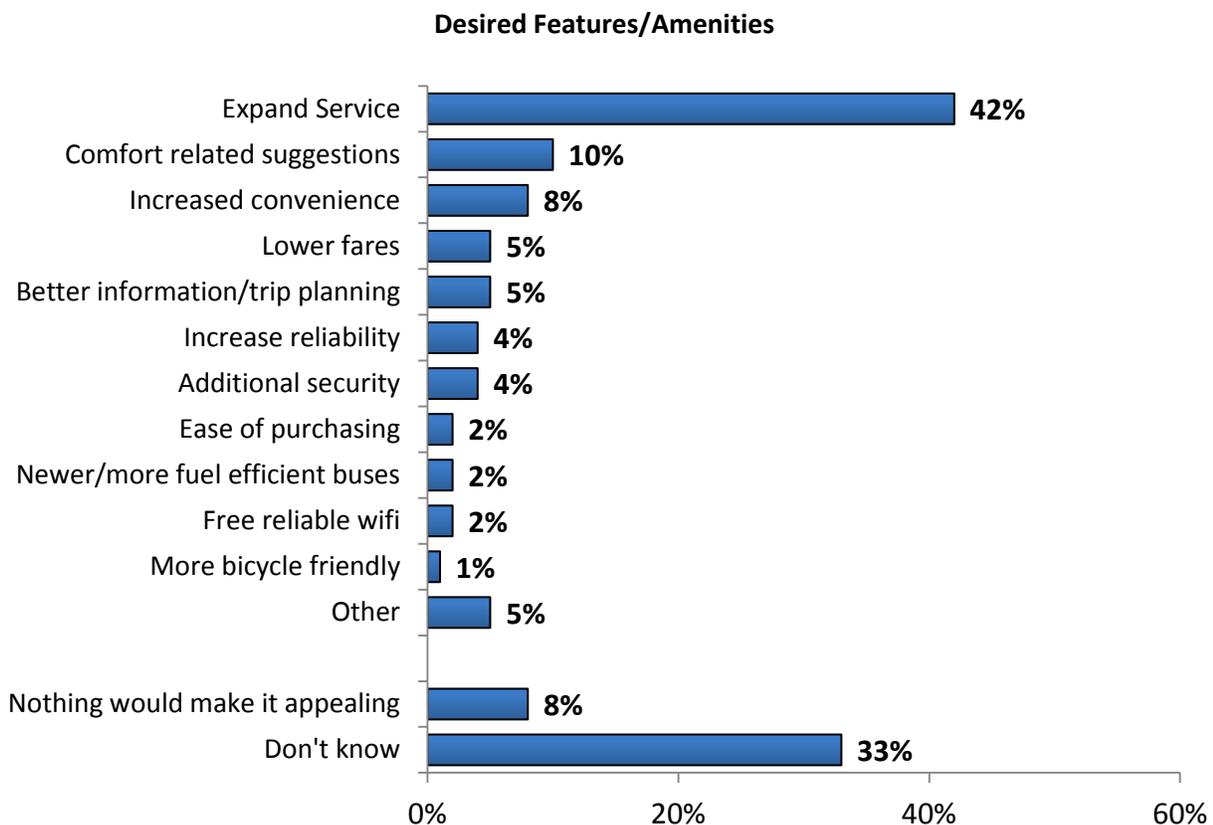
D. Features or Amenities to Increase Appeal of Public Transportation

When asked to name three features or amenities that would appeal to non-riders, the primary response was related to the more basic idea of expanding service (42% NET), which included both the geographic service area (34%) and the frequency and hours of service (18%). Expanded service was a more popular request among those ages 35 to 69 (46% vs. 33% of those 18 to 34).

One in ten (10%) made suggestions related to improving the comfort of public transportation, such as having stops and vehicles in better condition, shade at transit stops, more comfortable seats, more personal space, etc. Women (13%) and younger non-riders (16%) were more likely than their comparative groups to desire comfort related improvements (vs. 7% of men and 8% of those 35 to 69).

Several comments were linked to the idea of increasing the convenience of using transit – 8% total mentions – including making it faster, easier to use, closer bus stops, more park and rides, etc. Others requested lower fares, better information and trip planning tools, increased reliability, and more security (each mentioned by 4%-5%).

Of importance, a full one-third (33%) could not think of anything to suggest that Valley Metro could add to its current transit service that would make it appealing for the respondent or people like the respondent. An additional 8% flat out said there was nothing that would make it appealing and that they would not use it under any circumstances.



Q5A: Please name 3 features or amenities that Valley Metro could add to its current transit service that would make it more appealing for you and people like you to use public transportation? What else?

Base: 2015 n=500



Table 8: Desired Features or Amenities

Feature or Amenity	2015 n=500
Net: Expand Service	42%
Expand area/geographic location	34%
Expand frequency/hours of service	18%
More rapid/express buses	1%
Comfort related suggestions/physical comfort	10%
Vehicles/stops in better condition/cleaner	6%
Shade at transit stops	3%
More comfortable seats	1%
More personal space/less crowded	1%
Bus stops with air conditioning/coolers	1%
Restroom on the bus	<1%
Net: More convenient/faster/easier to use	8%
Easier to use (unspecified)	2%
Faster travel	2%
Closer bus stops to where I work/live	2%
More Park and Ride locations	1%
Drop off/pick up at my front door	1%
Fewer stops/able to travel to part of the Valley without stopping	1%
Lower fares	5%
Net: Better information/trip planning/scheduling tools	5%
Advertise more/provide more information	2%
Better trip planner/website	1%
App for transit planning	1%
Provide schedule/routes at bus stops	<1%
Increase reliability/be on time	4%
Additional security/fare inspectors	4%
Ease of purchasing tickets/fares	2%
Newer buses/more fuel efficient buses	2%
Free reliable WiFi	2%
More bicycle friendly	1%
Other	5%
Nothing /would not use under any circumstances	8%
Don't know	33%

Q5A: Please name 3 features or amenities that Valley Metro could add to its current transit service that would make it more appealing for you and people like you to use public transportation? What else?

Total n=500

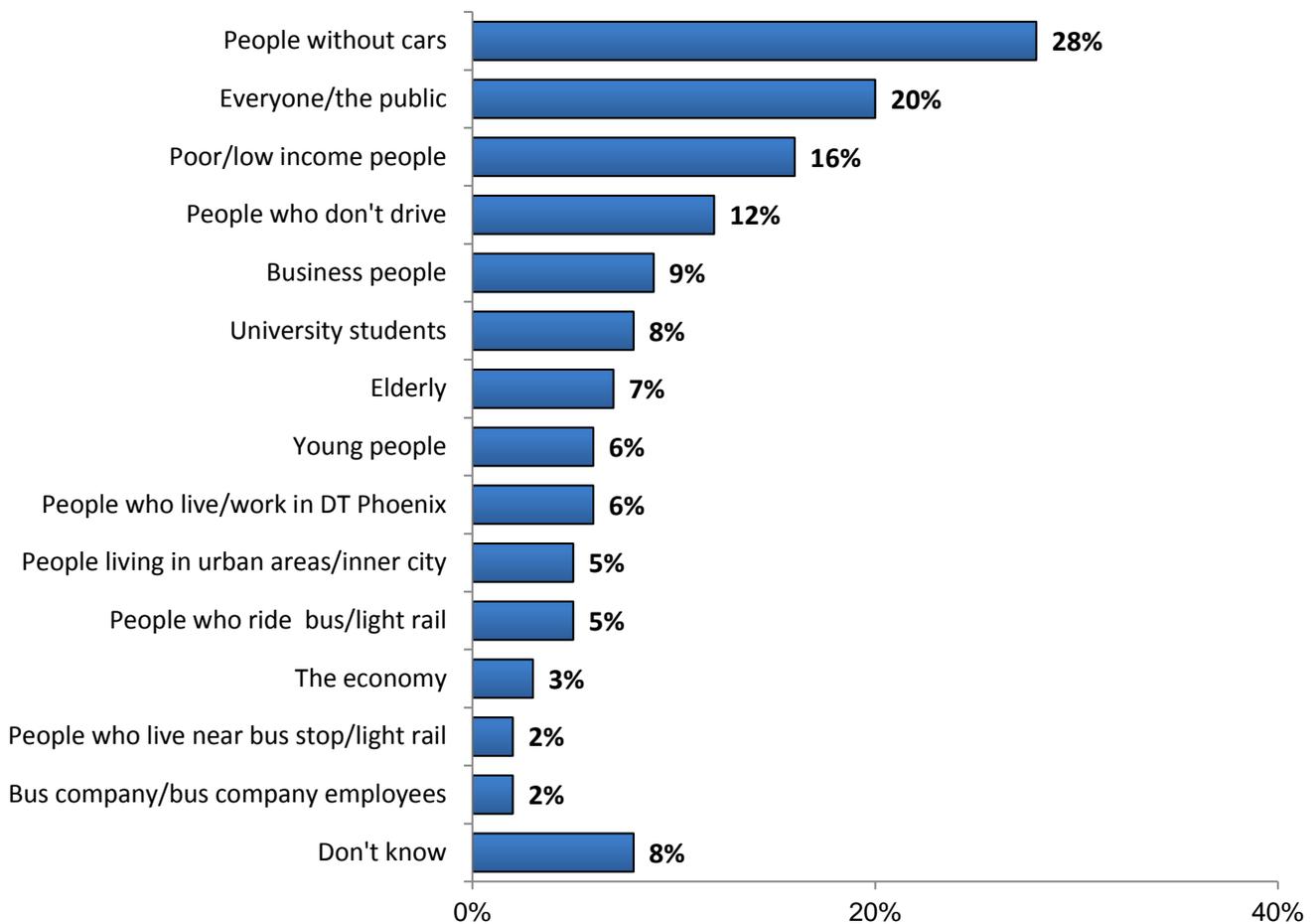


IV. Value of Public Transportation

A. Perceived Populations Benefitting from Valley Public Transportation

Non-riders were most likely to cite people without cars (28%), “everyone”/the public (20%), poor or low income residents (16%), and people who do not drive (12%) as those benefitting most from public transportation in the Valley. When combined together, 11% of non-riders view residents living or working in downtown Phoenix (6%) or in urban or inner-city areas (5%) as the ones benefitting from transit. Just under one in ten mentioned business people, university students and the elderly.

Who Benefits from Public Transportation



Q5. In your opinion, who benefits most from having public transportation in the Valley?
Total n=500



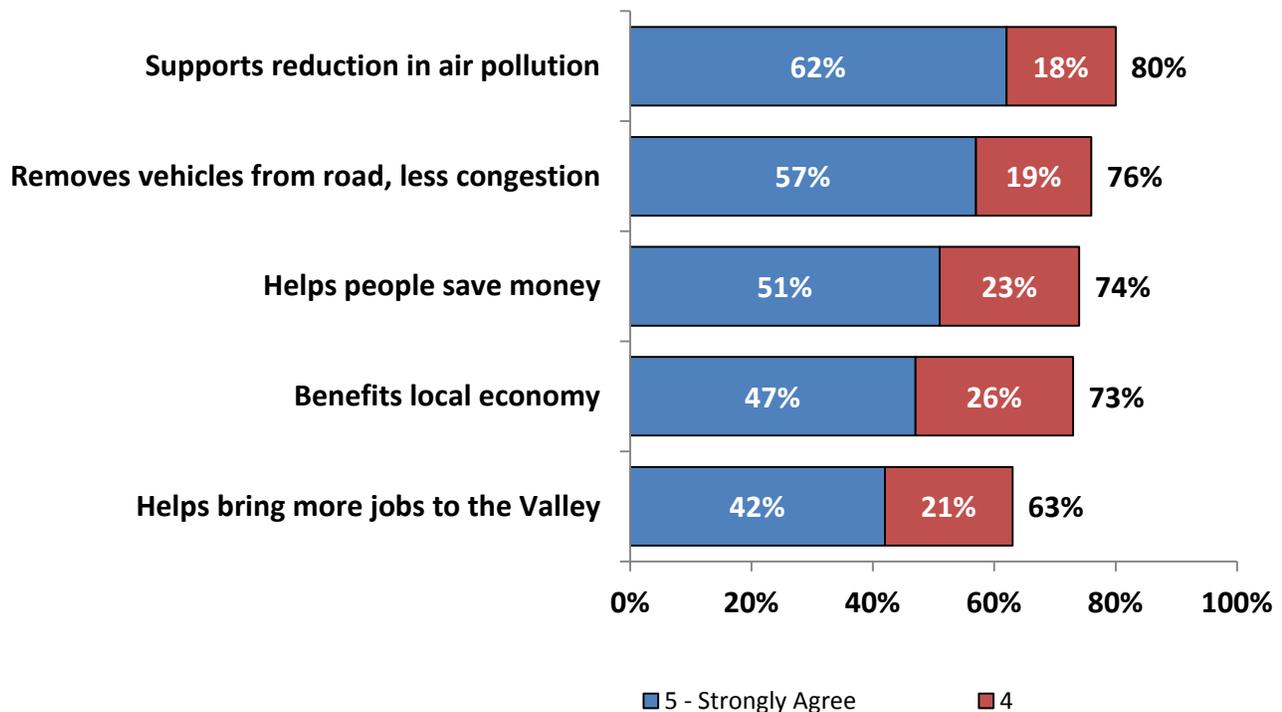
B. Level of Agreement with Transit Value Statements

Nearly two-thirds (63%) to 80% agreed with each of the five value statements evaluated (4+5 ratings, where 5 means “strongly agree”).

Non-riders were most likely to agree with the statement: *public transportation supports a reduction in air pollution/reduces our carbon footprint (80%)*. Approximately three in four agreed that *public transportation removes vehicles from the road making them less congested, helps people save money and benefits the local economy*. Just under two-thirds agreed *transit helps bring more jobs to the Valley*.

Across the board, Caucasian non-riders were less likely than non-riders of other ethnic backgrounds to agree with each statement (61% to 76% for Caucasians vs. 71% to 100% for others). Women were more likely than men to agree with all of the value statements and significantly more likely to agree *it helps people save money (79% vs. 69%)* and *reduces air pollution/carbon footprint (85% vs. 75%)*. Young non-riders (18 to 34) were significantly more likely than those ages 35 to 59 to agree *public transportation benefits the local economy (82% vs. 72%)* and *brings more jobs to the Valley (73% vs. 60%)*.

**Public Transportation Statements
Among those with An Opinion**



Total n =500 * DK excluded



Table 9: Agreement with Transit Value Statements

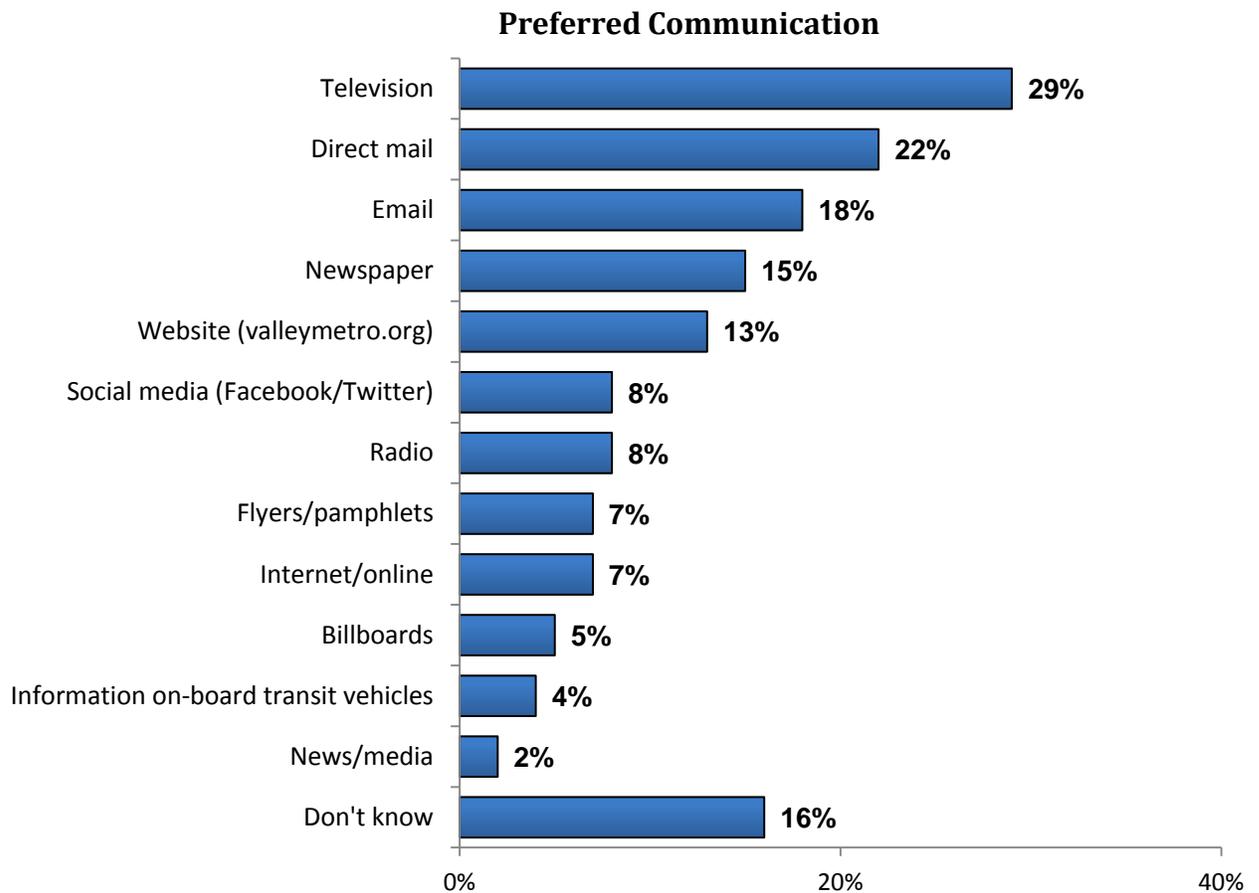
Statement	Top Two (4+5)	Strongly Agree			Strongly Disagree		Avg.
		5	4	3	2	1	
Supports reduction in air pollution/carbon footprint	80%	62%	18%	11%	4%	5%	4.4
Removes vehicles from the road making them less congested	76%	57%	19%	13%	5%	6%	4.2
Helps people save money	74%	51%	23%	16%	4%	6%	4.1
Benefits the local economy	73%	47%	26%	16%	7%	4%	4.0
Helps bring more jobs to the Valley	63%	42%	21%	23%	7%	7%	3.8

Q8. Please indicate your level of agreement with the following statements about public transportation. A quality public transportation system...



V. Best Way to Communicate Valley Metro Information

The top five communication methods recommended for informing non-riders about services offered by Valley Metro were: television (29%), direct mail (22%), email (18%), newspapers (15%) and the Valley Metro website (13%). While a myriad of other methods were suggested – social media, radio, billboards, etc. – none were suggested by more than 8%.



Q7. What would be the best way for Valley Metro to inform you about the services it offers to Valley residents?

Total n =500



Appendix A
Questionnaire



Valley Metro Non-Rider Survey 2015

Good _____, this is _____ calling from WestGroup Research in Phoenix. This is not a sales call. We are conducting a study about public transportation in the Valley.

I need to speak with the youngest male who is age 18 or older in your household. Would that be you? IF MALE NOT AVAILABLE, ASK: Could I please speak the youngest female who is age 18 or older? IF NECESSARY: We are asking only for your opinions and we are not selling anything. I just need a few minutes of your time.

N=500

Male/female: 250/250

Age quotas:

18 to 34 – n=160

35 to 54 – n=200

55+ = n=160

SCR1. Do you or does anyone in your household work for a market research company or a local public transportation agency or private bus operation?

- a. No -- CONTINUE
- b. Yes – THANK AND TERMINATE

SCR2. I am going to list the various types of public transportation available in the Valley, please indicate if you have used any of these within the past 12 months. Have you <ROTATE AND READ LIST> in the past 12 months? MUST BE “NO” TO ALL TO CONTINUE. IF YES TO ANY, THANK AND TERMINATE.

- a. Traveled in a local, city bus
- b. Used an express bus /or RAPID
- c. Taken a neighbor circulator service such as Flash/ALEX/GUS/ORBIT/SMART/MARY/DASH (smaller buses to neighborhood centers such as grocery stores, libraries, retail centers, movie theaters, etc)
- d. Traveled on Light Rail
- e. Used Dial-a-Ride

SCR 3. What is your age? Are you: READ LIST

- a. Under the age of 18 – THANK AND TERMINATE
- b. 18 to 24
- c. 25 to 34
- d. 35 to 44
- e. 45 to 54
- f. 55 to 69
- g. 70 or older – THANK AND TERMINATE
- f. DO NOT READ Refused

1. Valley Metro offers transit service in Maricopa County. Based on what you may have heard, seen or read or just on your general impressions - What are your perceptions of the



Valley Metro public transportation system? This includes buses, light rail, neighborhood circulators and Dial-a-Ride services? PROBE FOR DETAIL (What kinds of things comes to your mind when you think of public transit in the metro-Phoenix area?)

2. Overall, would you say your perception of Valley Metro and its services is .. READ LIST
 - a. Very favorable
 - b. Somewhat favorable
 - c. Not very favorable
 - d. Not at all favorable
 - e. DO NOT READ: Don't know

2a. Please explain the reason for your rating.
3. What are the primary reasons you choose not to use public transportation in the Valley? DO NOT READ LIST PROBE "What else" MULTIPLE RESPONSES ALLOWED
 - a. I prefer to drive my car/have my own car/prefer drive self
 - b. I don't know how to use the transit system
 - c. The transit stops are too far away
 - d. I'm uncomfortable being around the type of people who ride public transit
 - e. Riding public transit takes too long
 - f. Riding public transit feels unsafe
 - g. Transit service isn't frequent enough
 - h. Safety concerns
 - i. Public transit doesn't go where I need to go
 - j. Public transit is dirty
 - k. Too hot/heat/weather
 - l. Bad past experience with operator or people on board
 - m. I carpool/vanpool/telecommute/car share
 - n. Too crowded/too many people
 - o. Want to control when I come and go/Need to be flexible
 - p. *No wifi on board, any others*
 - q. Other: SPECIFY
 - r. Don't know
4. What do you think are good reasons why people should consider using public transportation? DO NOT READ LIST, MULTIPLE RESPONSE ALLOWED
 - a. Improve air quality
 - b. Reduce congestion
 - c. Avoid driving stress
 - d. Save gas money
 - e. Save car wear and tear
 - f. Save insurance cost
 - g. Use of riding time/work while commuting/get things done on transit
 - h. To meet new people
 - i. Reduce carbon footprint



- j. They do not have a car/car not working/no other option
 - k. Reduce stress/relax while commuting
 - l. Other SPECIFY: _____
 - m. There are no good reasons to consider riding transit
 - n. Don't know
5. In your opinion, who benefits most from having public transportation in the Valley?
(DO NOT READ LIST. MULTIPLE RESPONSE ALLOWED)
- a. poor/low income people
 - b. everyone/the public
 - c. people without cars
 - d. elderly
 - e. people who cannot drive/don't have a license
 - f. business people
 - g. students at the university
 - h. young people
 - i. people with disabilities
 - j. no one
 - k. the economy
 - k. Other (SPECIFY: _____)
 - l. Don't know
- 5a. ASK ALL: Please name 3 features or amenities that Valley Metro could add to its current transit service that would make it more appealing for you and people like you to use public transportation? What else? DO NOT READ LIST, MULTIPLE RESPONSE ALLOWED, NEED AT LEAST 3 RESPONSES
- a. Lower fares
 - b. More frequent service
 - c. More routes to serve places I need to go
 - d. Free, reliable WiFi Access
 - e. Easier methods of buying fares
 - f. An app that allows transit planning
 - g. An app that allows ticket purchasing
 - h. More comfortable seats
 - i. Vehicles and/or stops in better condition/cleaner
 - j. Easier to use
 - k. More personal space/less crowded
 - l. Shade at transit stops
 - m. Additional security/fare inspectors
 - n. Improved fare vending machines or fare boxes
 - o. Better Trip Planner or website
 - n. Other : SPECIFY: _____
 - o. Would not ride public transportation under any circumstances
 - p. Don't know/NA



6. What would you say are the chances you will use any type of public transportation (IF NECESSARY: Including local and express bus service, light rail system, neighborhood circulators, RAPID, or Dial-a-Ride or) in the future? Would you say the chances are ... READ LIST
- a. Very good
 - b. Good
 - c. Fair
 - d. Poor
 - e. Very poor
 - f. No chance at all
 - g. DO NOT READ: Don't know
- 6a. IF VERY GOOD, GOOD OR FAIR IN Q 6. Which of the following types of public transportation are you most likely to try? READ AND ROTATE RESPONSE CATEGORIES: Yes/No for each
- a. Local bus service
 - b. Express bus service
 - c. Light rail service
 - d. Neighborhood circulator service
 - e. Dial-a-Ride service
- 6b. IF POOR, VERY POOR, OR NO CHANCE IN Q6: What would you say is the main reason you say there is little to no chance that you will use public transportation in the future? DO NOT READ LIST
- a. I prefer to drive my car/have my own car/prefer drive self
 - b. I don't know how to use the transit system
 - c. The transit stops are too far away
 - d. I'm uncomfortable being around the type of people who ride public transit
 - e. Riding public transit takes too long
 - f. Riding public transit feels unsafe
 - g. Transit service isn't frequent enough
 - h. Safety concerns
 - i. Public transit doesn't go where I need to go
 - j. Public transit is dirty
 - k. Too hot/heat/weather
 - l: Bad past experience with operator or people on board
 - m: I carpool/vanpool/telecommute/car share
 - n: Too crowded/too many people
 - o. Want to control when I come and go/Need to be flexible
 - p: *No wifi on board*
 - q. Other: SPECIFY
 - r. Don't know
- 6c. IF PREFER TO DRIVE CAR IN Q6a : Please tell me more about why you prefer to drive yourself instead of using public transportation.



- 6d. IF THEY FEEL PUBLIC TRANSIT IS UNSAFE in Q6a: Please tell me more about why you feel that it is not safe to use public transportation in the Valley?
7. What would be the best way for Valley Metro to inform you about the services it offers to Valley residents? (DO NOT READ LIST) PROBE: What else would be a good way? (if needed: to inform you about services offered by Valley Metro?) TAKE FIRST AND SECOND RESPONSES.
- a. television
 - b. radio
 - c. newspaper
 - d. direct mail
 - e. transit shelters (kiosks)
 - f. information on board transit vehicles
 - g. website (valleymetro.org)
 - h. Social media (Facebook/Twitter)
 - i. e-mail
 - k. Other (SPECIFY: _____)
8. Using a scale of 1-5 : where a 5 means you Strongly Agree and a 1 means you Strongly Disagree. Please indicate your level of agreement with the following statements about public transportation.
- 5 = Agree Strongly 1 = Strongly Disagree
- a. A quality public transportation system helps bring in more jobs to the Valley
 - b. A quality public transportation system benefits the local economy
 - c. A quality public transportation system removes vehicles from the roads making them less congested
 - d. Using public transportation helps people save money
 - e. Using public transportation supports reduction in air pollution/carbon footprint



DEMOGRAPHIC INFORMATION

Finally, I have just a couple more questions about you so that we can classify your responses with other people who answered the survey. All of this information is kept confidential.

- D1. What is your zip code where you live? OR WHAT CITY DO YOU LIVE IN?
85 ____ _
- D2. Which of the following apply to you: Are you.... (MULTIPLE RESPONSES ALLOWED) (IF NECESSARY: We never release any individual information about anyone. We only use this information to tell whether different groups of people have different attitudes. Etc.)
1. Full-time employed
 2. Part-time employed
 3. Student
 4. Retired
 5. House spouse/stay at home
 6. Unemployed
- D3. 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
- D4. Finally, so we can ensure that all groups are statistically represented, please tell me the racial or ethnic group you consider yourself to be a member of. (Accept more than one answer)
- | | |
|-----------------------|---|
| White/Caucasian..... | 1 |
| African American..... | 2 |
| Hispanic/Latino..... | 3 |
| Asian American..... | 4 |
| American Indian..... | 5 |
| Other..... | 6 |
- D5. Do you have access to the Internet?
- a. Yes
 - b. No
 - c. DK/no answer
- D6. Do you own a smart phone?
- a. Yes
 - b. No
 - c. DK/no answer



D7. What is the combined total annual income of all members of your household? (READ LIST).

- a. Under \$30,000
- b. \$30,000-\$49,999
- c. \$50,000-\$69,999
- d. \$70,000-\$99,999
- e. \$100,000 or over
- f. DK/NA/REF

D8. RECORD GENDER

- a. Male
- b. Female

Thank you very much for your time. Have a nice day.

