



2004 Non-Rider Study

Prepared For:

Valley Metro
April 2004

Table of Contents

<u>Section:</u>	<u>Page #:</u>
Executive Summary	ii
Conclusions & Recommendations	iv
I. Introduction	1
A. Background and Methodology	1
B. Demographics	1
II. Summary of Findings	4
A. Transit Usage in the Valley.....	4
B. Transit Usage in Another City	7
C. Attitudes Toward Bus Usage in the Valley.....	10
D. Image of Valley Metro.....	13
E. Likelihood of Using Public Transit	20
F. Employment and Commuting Information	27
G. Residence in the Valley	29
Questionnaire	Appendix A
Cross Tabulations/Transcripts	Appendix B

Executive Summary

This report presents the results of a telephone survey of residents in the Metropolitan Phoenix area who do not currently ride the bus on a regular basis. WestGroup Research of Phoenix, Arizona conducted the study. The purpose of the telephone survey was to assess attitudes toward public transit and identify the propensity to use transit among Valley residents. The study was conducted for Valley Metro.

The last non-rider survey was conducted in 1999. The 1999 questionnaire was used as the initial model for the 2004 survey. Although not all questions were used from the previous survey, some questions remained the same. The first non-rider study was conducted in 1988. Therefore, whenever appropriate, the analysis examines the changes that have occurred between 1988, 1999 and 2004.

The interviews were conducted Monday through Saturday between 2 p.m. and 9 p.m. on weekdays and 10 a.m. and 2 p.m. on weekends in March 2004. Results are based on 407, 14-minute, telephone interviews conducted with 204 male and 203 female respondents living in the Metro area. The sample has a margin of error of $\pm 5\%$ at the 95% level of confidence.

Transit Experience

- Approximately two-thirds of the non-riders interviewed in 2004 (65%) indicated they had “never” ridden a bus in the Valley. This is up from 56% in 1999.
- Work was the most common destination for travel using public transit among those who had ridden a bus in the Valley at some time in the past.
- The use of public transit in other cities increased from 56% in 1999 to 63% in 2004. Those who used public transit in other cities did so because of the convenience it offered – they were able to get where they needed to go (25%), without much of a wait (23%) and it was easy to find and use (both at 19%). The most common complaints about using transit in other cities were the waits and delays (13%) or the crowded conditions (10%). Approximately one in ten were uncomfortable with the type of people riding the bus and/or did not feel completely safe (10%).

Attitudes Toward Bus Usage in the Valley

- The primary reason non-riders do not use public transit in the Valley is their perceived need for a personal vehicle for their travel needs (mentioned by 40%). A lack of bus service, inconvenient bus schedule, or a dislike for the amount of time required to use transit are the next most commonly mentioned reasons for avoiding transit (17%, 17%, and 11%, respectively).
- Three in ten non-riders indicated that saving money on gas was a good reason to consider using public transit. This is more than double the percentage of mentions from 1999 (13%). The top two reasons, as in the past, were maintaining air quality (55%) and reducing traffic congestion (43%).

Image of Valley Metro

- Overall, 40% of the words used to describe Valley Metro were negative in nature, only 16% were positive. “Underdeveloped” and “inadequate” were the two words most commonly used to describe the current Valley Metro transit system (mentioned by 16% overall). Positive comments (mentioned by less than 10% each) were that the system is “good,” “very good,” or “excellent.”
- Seven word pairs were presented to the non-riders and they were asked to select the one word from the pair that they felt best describe the Valley Metro buses and its logo. In five of the seven pairs presented, the non-riders were more likely to select the positive attribute more often than the negative attribute. The two dominant positive attributes were “clean”(69% vs. 14%) and “friendly” (64% vs. 14%) – these attributes were selected almost five times more often than their negative counter parts. The only word pair that resulted in more negative selections than positive was “boring” (44%) and “exciting” (32%).

Knowledge of Bus Services

- Overall, non-riders are most likely to believe there are transit services available to get them to the airport (44%) and shopping (42%). In general, percentages from 2004 were lower than in 1999, indicating that non-riders have not recognized an overall increase in transit service over the past five years that may be more apparent to riders. However, residents of Phoenix, Tempe and Glendale (all cities with dedicated transit tax) are more likely to believe they could use transit to get to all of the queried locations.
- The Internet has taken over as the source non-riders are most likely to turn to if they needed information about using public transit in the Valley (mentioned by 33% up from 13% in 1999). The likelihood non-riders will turn to the Bus Book or call the transit number has decreased.
- Non-riders are most likely to request route frequency (67%) and maps (58%) as information that should be posted at bus stops.

Likelihood of Using Public Transit in the Future

- Approximately half of the non-riders indicated there was at least a “good chance” they would use public transit in the Valley at some point in the future (27% “very good” and 21% “good”). This is down slightly from 1999 (48% vs. 55% combined “very good + good”). The percentage of those indicating there was “no chance at all” increased from 12% in 1999 to 23% in 2004.
- The primary reason residents are unlikely to use transit in the future is a preference for driving their own car (mentioned by 35%). Approximately one in five indicated that they are unlikely to use transit because of the lack of service where they live and/or work as well as overall belief that transit will not fit their needs (mentioned by 21%).
- Those who indicated they prefer driving over transit simply reiterated they prefer the independence they have while driving alone (45%).

- The ability to arrive at their destinations using transit in the same amount of time as they would driving alone is the primary motivator for non-riders to use public transit (25%). Better and/or increased service is also important to approximately one in four non-riders. For the first time, 6% of non-riders indicated they would consider using public transit if gas prices continue to increase.

Conclusions and Recommendations

1. Non-riders continue to have positive experiences using public transit in cities outside of the Valley, but as of yet, have not been motivated to take advantage of or are not aware of system improvements in the Valley. It will be necessary to increase the marketing efforts promoting the expansion of transit services to the general public so that willing non-riders are aware that transit is more convenient and effective than it has been in the past.
2. In general, the negative impressions of the Valley's transit system is directly related to the perceived inadequacy of the service available and not necessarily an overall negative view of Valley Metro. Non-riders continue to believe that using transit will be time consuming and intrusive, however, the "look" of the system is "clean," "modern," and "friendly". It appears, therefore, that it is the service (or lack of it) and not the image that is keeping non-riders off of the transit system in the Valley.
3. Rising gas prices are beginning to generate interest in the usage of public transit as a way to save money. Emphasizing this message along with education that there is convenient and efficient public transit available for many trips should catch the attention of many non-riders who would like to see transit work for them.
4. In general, past transit usage, whether it was in the Valley or in some other city is the best way to identify high probability transit users for the future. These non-riders have seen transit work for them, and once they are made aware of system improvements that are bringing the Valley's transit system more in line with systems around the country, they are likely to give it a chance.

I. Introduction

A. Background and Methodology

This report presents the results of a telephone survey of residents in the Metropolitan Phoenix area who do not currently ride the bus on a regular basis. WestGroup Research of Phoenix, Arizona conducted the study. The purpose of the telephone survey was to assess attitudes toward public transit and identify the propensity to use transit among Valley residents. The study was conducted for Valley Metro.

The last non-rider survey was conducted in 1999. The 1999 questionnaire was used as the initial model for the 2004 survey. Although not all questions were used from the previous survey, some questions remained the same. The first non-rider study was conducted in 1988. Therefore, whenever appropriate, the analysis examines the changes that have occurred between 1988, 1999 and 2004.

The interviews were conducted Monday through Saturday between 2 p.m. and 9 p.m. on weekdays and 10 a.m. and 2 p.m. on weekends in March 2004. Results are based on 407, 14-minute, telephone interviews conducted with 204 male and 203 female respondents living in the Metro area. The sample has a margin of error of $\pm 5\%$ at the 95% level of confidence.

Households were selected by means of random digit dialing. The methodology effectively includes all residential telephone numbers regardless of listing. Newcomer households and as many as 50% of some subgroups are not listed in published directories. The importance of the RDD methodology is in its ability to provide a true random sample of the population.

B. Demographics

Several questions were asked in order to create a demographic profile of the respondents. The demographic characteristics of this sample were consistent with other studies conducted. The responses to these questions are summarized in Tables 1a and 1b. Listed below is an overview of the respondent characteristics.

- According to established quotas, 50% of the respondents were males and 50% were females.
- The average age of the respondents was approximately 51 years old. This is slightly older than the general population, but not unexpected since transit riders were excluded from the sample. Three in five respondents were married (61%)
- The average income of the non-riders sampled for the study was \$49,800 and slightly more than four in ten (43%) had at least a college education. The majority of households had at least once employed person (77%). More than half of the employed respondents was in professional, technical, or managerial positions (55%).
- As expected with a random sample of Metro-Phoenix respondents, the largest percentage of residents live in the City of Phoenix (27%). On average, the residents had lived in the Valley for approximately 21 years.
- The vast majority of the respondents reported having at least one vehicle in running condition in their household (96%). The average was 1.9 vehicles per household.

Table 1a: Respondent Demographics

Characteristic	Percent (n=407)	Characteristic	Percent (n=407)
Gender		Residence	
Male	50%	Phoenix	27%
Female	50%	Scottsdale	7%
		Tempe	5%
Age		Mesa	16%
18 to 24	8%	Glendale	10%
25 to 34	14%	Chandler	4%
35 to 44	16%	Avondale	2%
45 to 54	16%	Peoria	6%
55 to 64	17%	Gilbert	4%
65+	25%	Sun City/west	5%
Refused	4%	Apache Junction	2%
Average age	50.9	Surprise	5%
		Other	7%
Income		Marital Status	
<\$10,000	3%	Married	61%
\$10 - \$20,000	6%	Single	36%
\$20,001 - \$30,000	8%	Refused	3%
\$30,001 - \$50,000	14%		
\$50,001 - \$60,000	12%	Education	
Over \$60,000	31%	Grade school	3%
Refused	26%	High school	23%
Average	\$49,800	Some college	28%
		College graduate	28%
		Post graduate	15%
		Refused	3%

*Includes all responses <1%.

Table 1b: Respondent Characteristics

Characteristic	Percent (n=407)	Characteristic	Percent (n=407)
Occupation		Number of Children in daycare	
Professional/technical	44%	None	82%
Manager/proprietor/ official	11%	One	9%
Service worker	10%	Two	3%
Clerical	4%	Three or four	2%
Craftsman/laborer	10%	Refused	4%
Sales	10%	Average w/ child in daycare	1.5
Other/refused	11%	Number of Running Vehicles	
Number of Employed Adults		None	2%
None	23%	One	33%
One	33%	Two	44%
Two	32%	Three	14%
Three to four	8%	Four or more	5%
Five or more	1%	Refused	2%
Don't know/refused	3%	Average	1.9
Average	1.3	Length of Residence	
Number of Children (under 18, in household)		5 years or less	16%
None	64%	6 to 10 years	14%
One to two	25%	11 to 15 years	12%
Three or more	6%	16 to 25 years	23%
Don't know/refused	5%	26 to 50 years	29%
Average w/children	1.8	More than 50 years	6%
		Average	21.3

II. Summary of Findings

A. Transit Usage in the Valley

1. Usage of Bus in Past Week

By study design, only those who have not ridden the bus at all in the past week or have only ridden once in the past week were included in the study. In 1999, 96% of respondents had not ridden any transit in the past week. Virtually all (99%) of the 2004 non-riders had not used public transit in the past week.

2. Overall Transit Experience

The 2004 non-riders also were less likely than those interviewed in 1999 to have “ever ridden” any transit (65% vs. 56%)

Have Ever Ridden a Valley Bus

(Includes those who have ridden any public transit in past year and more than one year)

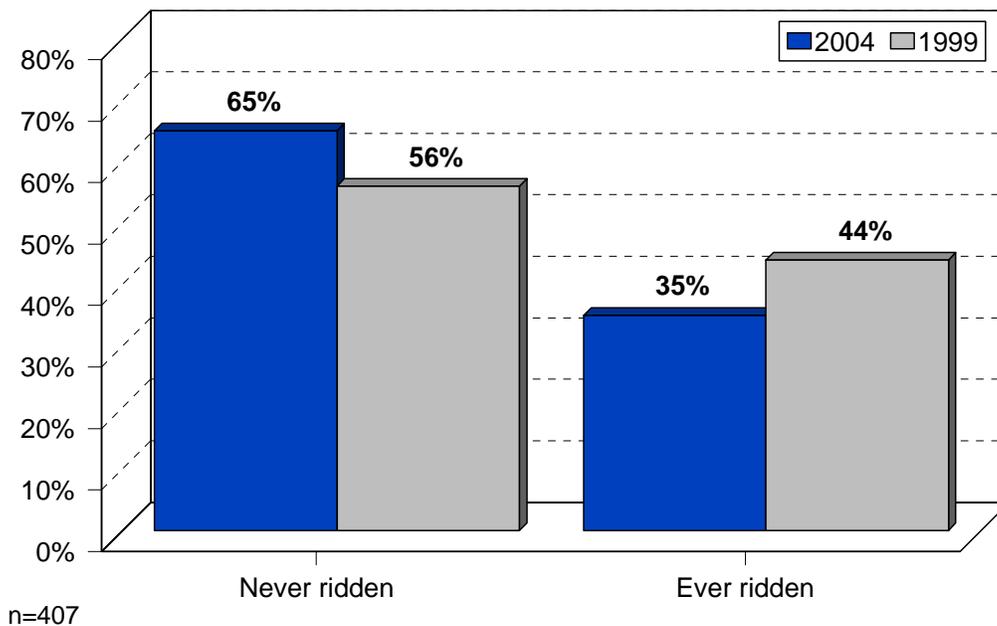


Table 2a shows that 2004 non-riders were most likely to have ridden a city bus than used any other form of public transit in the Valley (7% past year + 21% more than a year). This is less than was measured in 2003 in the Regional Market Study, but that was a general population study, which included current transit users. In general, younger residents and single residents were more likely to report using public transit in the past than those in comparative subgroups.

Table 2a: Transit Usage 2004

	Past Year	More than a Year Ago	Never	Don't know
Ridden a city bus	7%	21%	69%	3%
Ridden an express bus	2%	5%	89%	4%
Ridden a Local Area Shuttle	5%	4%	88%	3%
Dial-A-Ride	2%	2%	93%	3%
Ridden RAPID	1%	2%	95%	3%

3-1 to 10-2: I am going to list the various types of public transit available in the Valley, please tell me when was the last time you used that mode, if ever. **READ AND ROTATE LIST FOR EACH:** Past year, more than one year, never

Table 2b: Transit Usage – 2003 vs. 2004 Past Year

	2004	2003*
Ridden a city bus	7%	15%
Ridden an express bus	2%	8%
Ridden a Local Area Shuttle	5%	8%
Dial-A-Ride	2%	3%
Ridden RAPID	1%	na

*Data from March 2003 Valley Metro Regional Market Study
(General population sample includes bus riders)

3. *Destinations for Bus Travel*

As in the past, work was the most common destination among non-riders who have used public transit in the past (34% of those who have used in the past year or 12% of the total sample). A small, but notable, percentage reported using public transit when they had jury duty (4%).

Those most likely to use transit to work in the past were:

- Employed residents (44%)
- Those ages 35 to 54 (48%)
- Single residents (42%)
- Those with incomes between \$30,000 and \$50,000

Non-riders with a high school education or less (30%) were more likely than others to indicate they had used public transit to go shopping.

Younger residents (27%) and single non-riders (23%) were most likely to have used transit to go to school.

Women (17%), unemployed residents (16%) and those age 55 or older (22%) were most likely to indicate they had traveled to the airport using public transit.

Table 3: Destinations

Responses	2004 Metro-Phx Former Riders (n=140)	2004 Total Sample (n=407)	1999 Total Sample (n=400)	1988 Total Sample (n=1206)
To or from work	34%	12%	12%	9%
To or from shopping	16%	6%	3%	3%
To or from school	16%	5%	5%	4%
Social or recreational	12%	4%	1%	3%
To or from airport	11%	4%	N/A	N/A
To or from medical appts.	6%	2%	1%	N/A
To or from jury duty	4%	1%	N/A	N/A
To pick up car from shop	2%	-	N/A	N/A
To or from sporting events	1%	-	1%	N/A
Other purposes/DK	11%	4%	1%	N/A

11-1: Where did you go when you rode the bus? (If ever rode any transit option)

B. Transit Usage in Another City

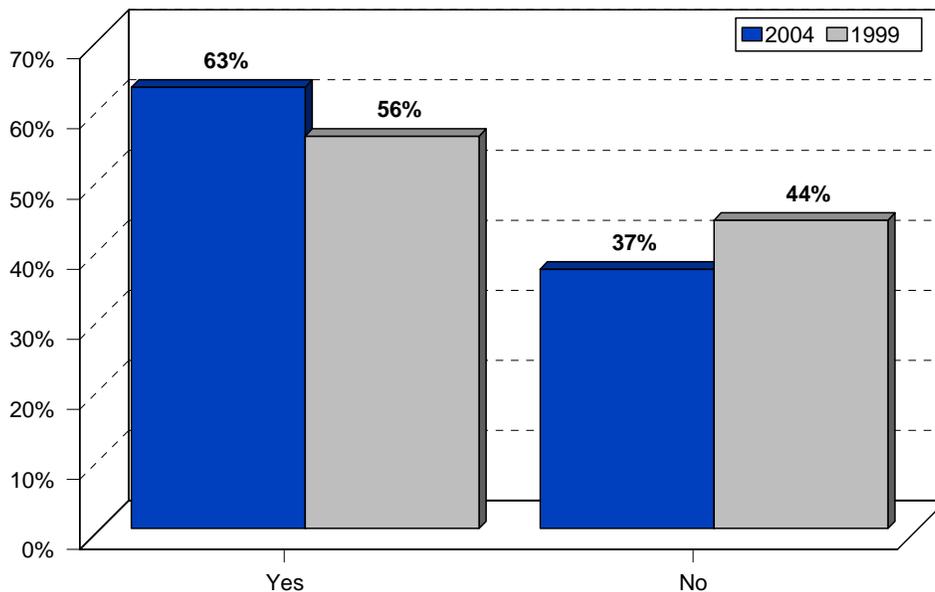
1. Have Ridden Bus in Another City

Use of transit in cities other than Phoenix increased slightly in 2004 from 1999 (56% to 63%). Non-riders ages 35 and older (66%), married residents (68%), those with a college degree (76%), and those with household incomes more than \$60,000 were most likely to have used public transit outside of Phoenix. Scottsdale residents were most likely to report using public transit in other cities (76%).

Use of public transit in other cities is also correlated with a willingness to consider using public transit in the Valley. Seven in ten (71%) of those indicating there is a good chance they would use transit in the future in Phoenix also indicated they have used public transit in other cities.

Have Ridden Public Transit in Another City

Have you ever ridden public transit in another city?



2. *Aspects Liked about Transit in Another City*

Convenience was the primary theme among the top four reasons mentioned by non-riders when asked what they liked about using transit in other cities. It got them where they wanted to go (25%), without much of a wait (23%), and was easy to find and to use (both at 19%). Approximately one in ten non-riders mentioned cost savings.

The ability to go wherever they wanted to was particularly noted by younger residents (35%), whereas frequency of service was more likely to be mentioned by women (27%).

**Table 4: Aspects Liked about Transit in Other Cities
(Among those who have used transit in other cities)**

Responses	2004 (n=256)
Gets you anywhere you want to go	25%
Fast/frequent/every 15 minutes/on time	23%
Easy access/convenient locations/ practical/ easier than driving	19%
Convenience/easy (unspecified)	19%
Inexpensive/economical/no rental costs	10%
Didn't own, have or need a car/ only way to get around/ no choice	9%
No worries about parking	9%
Great/nice/good	6%
Avoid traffic congestion	4%
Clean	2%
Other	16%
Didn't like anything about it	7%

13-1: *What did you like about using public transit in that city?*

3. *Aspects Disliked about Transit in Another City*

Only two-thirds of those who had used public transit in other cities were able to mention something they did not like about the experience. The most common irritation was the waits and delays associated with transit usage (13%). Others felt the system was too crowded (10%) and/or were uncomfortable with the type people riding the bus and did not feel completely safe (10%). Overcrowding was more likely to be a concern among women than men (14% vs. 6%). Former Valley transit users were less likely to offer any criticisms of their use of transit in other cities (42% nothing to mention vs. 24% of those who have never used transit in the Valley).

**Table 5: Aspects Disliked about Transit in Other Cities
(Among those who have used transit in other cities)**

Responses	2004 (n=256)
Nothing to mention/no dislikes	31%
Delays/long waits/slow	13%
Crowded	10%
Unsavoury characters/safety concerns	10%
Inconvenient schedule/general inconvenience	6%
Dirty/smelly	6%
Limited destinations/didn't go right places	4%
Weather	3%
Parking	2%
Confusing/difficulty figuring out transfers	2%
Cost	2%
Too far away	1%
Other	9%
Don't know	11%

14-1: *What didn't you like about using public transit in that city?*

C. Attitudes Toward Bus Usage in the Valley

1. Main Reasons for Not Riding Bus in Valley

As in 1999, the perceived need for a vehicle to travel around the city is the dominant reason offered by non-riders as to why they do not use public transit (mentioned by 40%). This is particularly true among those ages 18 to 34 (58%) and those with less than a college education (47%).

Other commonly mentioned reasons are a lack of bus service where they live (17%), an inconvenient bus schedule (17%) and feeling that using transit takes too much time (11%). Inconvenient transit schedules are most likely to be mentioned by men (22%), employed residents (22%), those ages 35 to 54 (25%), and those with incomes exceeding \$60,000. Employed residents also were more likely than others to believe that using transit would take too long (16%).

Scottsdale non-riders are more likely than residents in other cities to indicate they do not ride the bus because the bus schedule is inconvenient (28%) and/or there is no bus service in their area (24%).

Interestingly, the percentage of residents who indicate that transit service is not available in their area has decreased significantly since 1988 (26% to 17%), while those indicating they do not ride because they have a vehicle have increased from 27% to 40%.

Top Reasons for Not Riding Bus

What would you say is the main reason you do not currently ride the bus in the Valley? What other reasons?

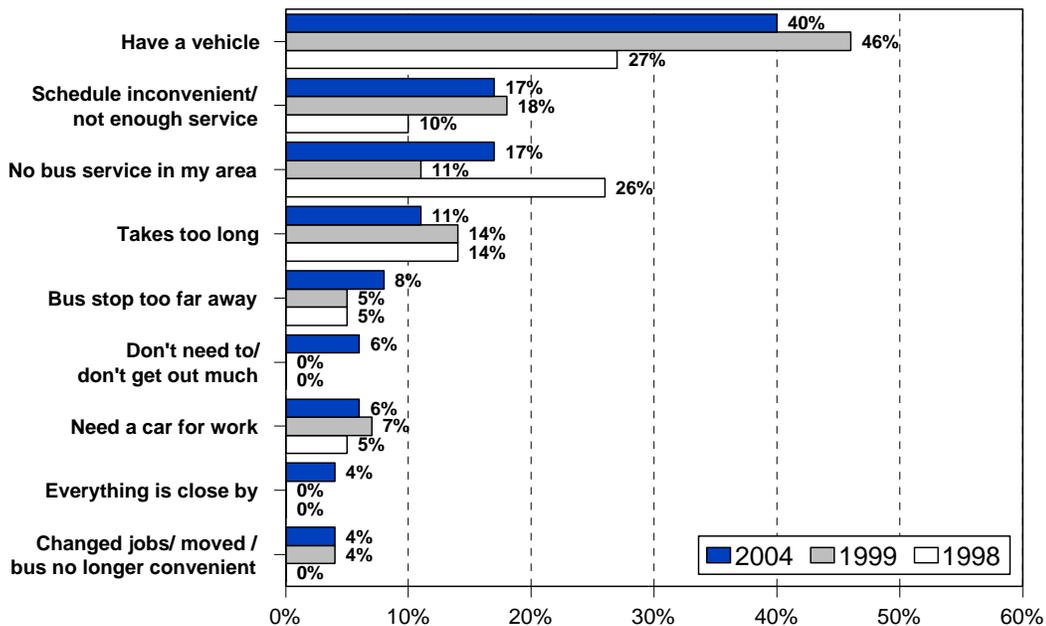


Table 6: Reasons for not Riding Valley Buses

Responses	Total 2004 (n=407)	Total 1999 (n=400)	Total 1988 (n=1206)
Got a car/have a vehicle	40%	46%	27%
Bus schedule inconvenient/ not enough service	17%	18%	10%
No bus service in my area	17%	11%	26%
Took too long/would take too long	11%	14%	14%
Bus stop too far away	8%	5%	5%
Need a car for work	6%	7%	5%
No need to/don't go places very much	6%	na	na
Changed jobs or moved /bus no longer convenient	4%	4%	na
Live close to work/everything is close by/work at home	4%	1%	na
Retired/don't work	4%	na	na
Safety concerns	2%	na	na
Need vehicle to run errands	1%	3%	na
Need a car to bring kids to school/daycare	1%	1%	na
Tired of the hassle	1%	8%	na
Cost	-	2%	na
Don't like public transportation	-	2%	na
Can get rides	-	1%	na
Other	10%	4%	na
Don't know	2%	3%	na

15-1: What would you say is the main reason you do not currently ride the bus in the Valley?
What other reasons?

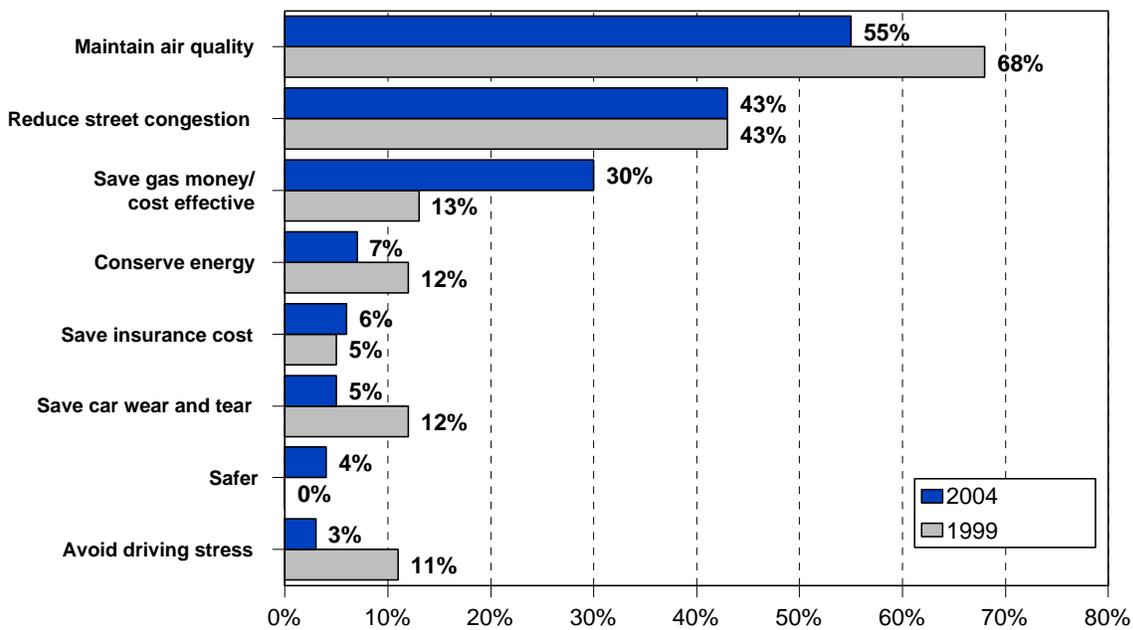
2. *Good Reasons to Consider Riding the Bus*

Mentions of saving money on gas have more than doubled since 1999 as a good reason to consider using public transit (13% to 30%). The other top two reasons remain the same as in 1999 – maintaining air quality (55%) and reducing traffic congestion (43%).

Residents who indicated there was a good chance they would use public transit in the future were more likely than the other non-riders to indicate using public transit would be good for air quality (60%), reduce congestion (48%) and save them money (37%). Tempe residents were more likely than others to suggest that using transit would help reduce street congestion (63%). Glendale residents were more likely to indicate that using transit would save money (42%)

Top Reasons to Consider Riding the Bus

What do you think are good reasons why people should consider riding the bus?



n=407

Table 7: Reasons to Consider Riding the Bus

Responses	Total 2004 (n=407)	Total 1999 (n=400)
Maintain air quality	55%	68%
Reduce street congestion	43%	43%
Save gas money/cost effective	30%	13%
Conserve energy	7%	12%
Save insurance cost	6%	5%
Save car wear and tear	5%	12%
Safety/fewer accidents	4%	-
Avoid driving stress	3%	11%
Use of riding time	2%	3%
There are no good reasons	6%	6%
Other	10%	4%
Don't know	6%	5%

17-1: What do you think are good reasons why people should consider riding the bus?

D. Image of Valley Metro

1. Top of Mind Images about System

“Underdeveloped” and “inadequate” were the two words most commonly used to describe the current Valley Metro transit system (mentioned by 16% overall). This perception was strongest among those who have used transit in the Valley in the past (20% vs. 13%) and among those who have used transit in other cities around the country (20% vs. 7%). In general, non-riders with an opinion were more likely to indicate a negative impression of the system (40% of the mentions) than a positive impression (16% of the mentions). People who had ridden the system at some time in the past were both more positive and more negative in their impressions – basically they were able to offer more comments than those who have never ridden a bus in the Valley.

The positive comments were non-specific with non-riders simply indicating the system was “good”, “very good” or “excellent” (8% and 6%). A few people indicated the system was dependable, convenient and affordable.

Table 8: Top of Mind Images

Responses	Total 2004 (n=407)	2004 Past Bus Ridership	
		Never ridden (n=251)	Ever ridden (n=143)
NET NEGATIVE	40%	37%	45%
Underdeveloped/needs improvement/ inadequate	16%	13%	20%
Very bad/poor/horrible	9%	9%	9%
Inconvenient	7%	5%	8%
Doesn't go where I want to go/ Unavailable/inaccessible	4%	3%	6%
Slow/time consuming	4%	2%	6%
Non-existent/unworkable/useless	3%	4%	2%
Unorganized/inefficient/confusing	3%	4%	2%
Other negative	2%	2%	1%
NET POSITIVE	16%	12%	27%
Okay/fair/decent/good	8%	7%	11%
Very good/excellent/helpful/dependable	6%	4%	10%
Convenient	1%	-	3%
Economical/affordable	1%	-	3%
Other positive	4%	1%	4%
Miscellaneous/neutral	10%	7%	15%
Don't know	32%	43%	15%

18-1: What two words would you use to describe the Valley Metro public transit system in the Valley?

2. Word Pairs

Non-riders were read a series of seven word pairs or attributes that could be used to describe their perception of Valley Metro buses and its logo. They were asked to select one of the words from the pair that they felt best described their perceptions. The order in which the attributes within the pairs were presented was rotated as well as the pairs themselves.

In five of the seven word pairs presented, non-riders more often selected the positive attribute over the negative attribute. The only exceptions were a relatively even split for “low key” vs. “bold” and a higher percentage for “boring” vs. “exciting.” **The two positive attributes that significantly overshadowed the words they were paired with are “clean,” and “friendly.”** These attributes were selected almost five times more often than their negative counterparts, “dirty” and “unfriendly.”

Overall, non-riders most likely to select the positive attributes over their negative counterparts are those who have used transit in other cities (two to 14 points higher in percent positive selected over negative) and those who indicated there would be a good chance they would use transit in the future (nine to 25 points higher in percent positive selected over negative – See Table 9).

Tempe non-riders tended to have a more positive image of Valley Metro than residents of other cities.

Attributes Describing Valley Metro

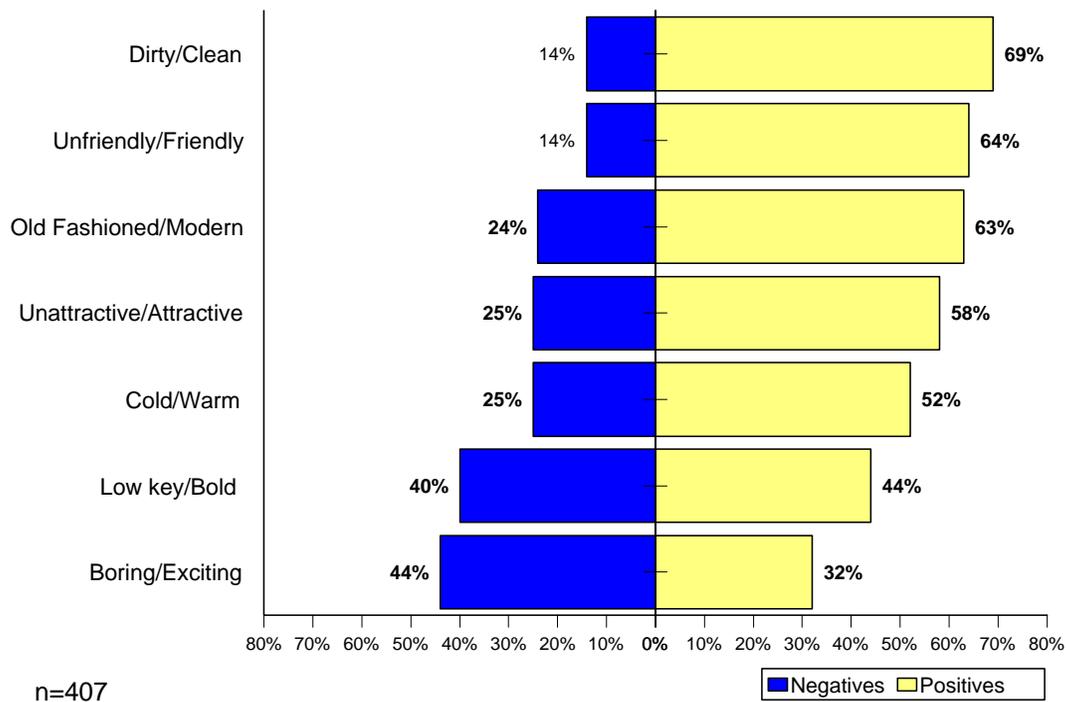


Table 9: Appeal of Buses and Logos

Responses	Total 2004 (n=407)	Chance of Future Transit Usage	
		Good (n=252)	Poor (n=149)
Clean	69%	72%	63%
Friendly	64%	72%	52%
Modern	63%	67%	57%
Attractive	58%	67%	42%
Warm	52%	57%	43%
Boring	44%	43%	45%
Bold	44%	46%	36%
Low key	40%	42%	36%
Exciting	32%	37%	24%
Unattractive	25%	22%	30%
Cold	25%	26%	25%
Old fashioned	24%	25%	22%
Dirty	14%	15%	13%
Unfriendly	14%	15%	15%

19-1 to 25-2: Now I would like you to think about the look and appeal of the Valley Metro buses and its logo. I am going to read you several word pairs. After you hear each word pair, please select the one that you feel best describes the current look of the Valley Metro buses and its logo.

3. Knowledge of Bus Services

In general, compared to 1988, non-riders are more likely to believe there is bus service to get them to all destinations. However, compared to 1999, non-riders in 2004 are not any more optimistic about the ability of transit to get them to the destinations queried. In most instances the percentages actually were slightly lower. Overall non-riders are most likely to believe there are transit services available to get them to the airport (44%) and shopping (42%).

Those most likely to believe there is transit service to all of the destinations are those who have ridden a Valley Metro bus in the past, those likely to use transit in the future, and those with household incomes less than \$30,000. Older residents are least likely to believe that they would be able to get to most of the destinations. In addition, single non-riders are more likely than married non-riders to believe they could use transit to go shopping (52% vs. 38%), medical appointments (41% vs. 29%) and to school (39% vs. 28%). Residents with a high school education or less are more likely than those with a higher level of education to feel they could use transit to get to work (45% vs. 28%) and to school (40% vs. 28%).

Residents of Phoenix, Tempe and Glendale, overall, are more likely to believe they could use public transit to get to the destinations mentioned than residents in the other cities. Scottsdale residents were least likely to believe they would be able to use public transit to reach the destinations.

Bus Service

From what you know, do you think there is bus service that you or someone in your household could take to get to and from...

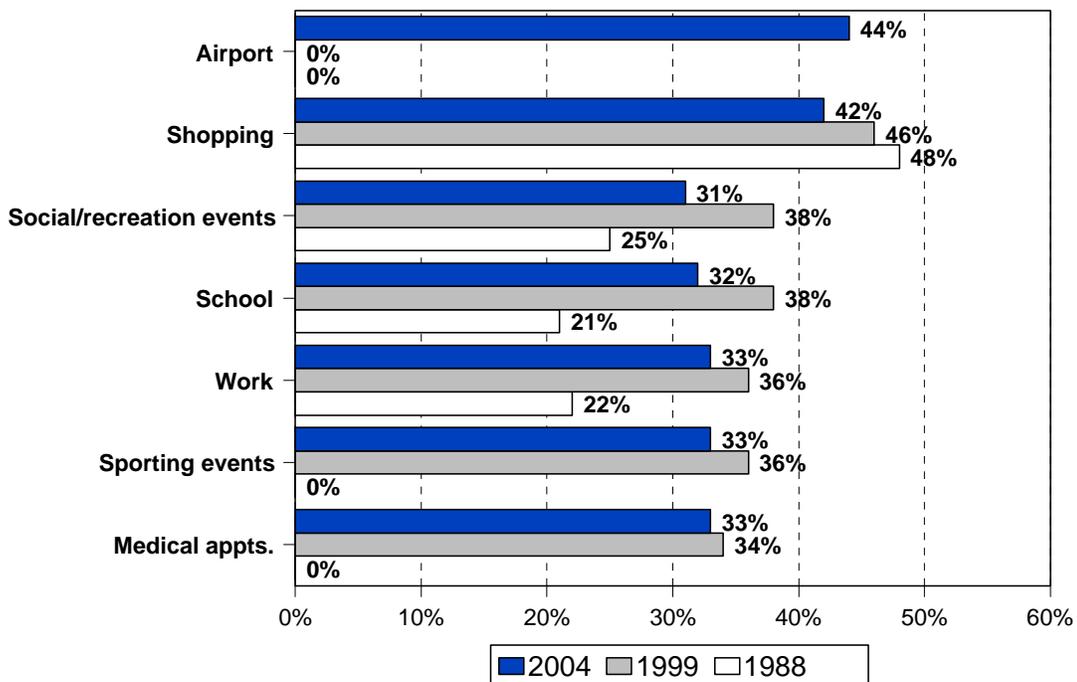


Table 10: Knowledge of Bus Services Available

Responses	Total 2004 (n=407)	Past Bus Ridership		Marital Status	
		Never Ridden (n=251)	Ever Ridden (n=140)	Married (n=249)	Single (n=145)
Airport	44%	39%	54%	45%	45%
Shopping	42%	33%	60%	38%	52%
Work	33%	23%	51%	30%	40%
Medical appts.	33%	29%	41%	29%	41%
School	32%	20%	52%	28%	39%
Sporting events	33%	25%	46%	32%	36%
Social/recreation activities	31%	21%	47%	30%	33%

26-1 to 32-2: From what you know, do you think there is bus service that you could take to get to and from...

4. Source of Bus Information

The sources residents are most likely to turn to for transit information have changed dramatically since 1988, and slightly since 1999. The most dramatic change has been in the role of the Internet. There were no mentions of the Internet in 1988, 13% of the residents in 1999 indicated they would use the Internet and in 2004 the percentage jumped to 33% -- becoming the most likely source overall. Those most likely to turn to the Internet are men (36% vs. 26%), those who have used transit in other cities (36% vs. 21%), employed residents (45% vs. 15%), residents under age 55 (45% vs. 14%), those with a college degree (40% vs. 25%) and residents with household incomes over \$60,000 (49% vs. 14% of those with incomes under \$30,000).

Correspondingly, the likelihood non-riders will turn to the Bus Book or call the transit number has decreased – Transit number down from 74% in 1988 to 15% in 2004; Bus Book down from 24% in 1999 to 14% in 2004. Non-employed residents are more likely to turn to the Yellow Pages (29% vs. 19%). Those who have used transit in the Valley before are more likely than others to turn to the Bus Book for transit information (25% vs. 7%).

Top Sources of Information about Transit Services

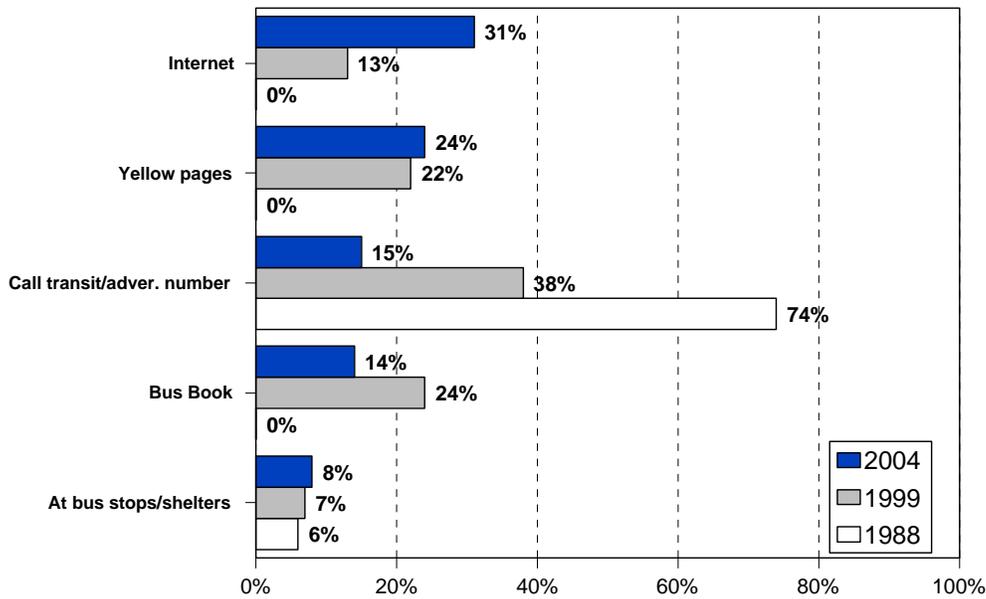


Table 11: Source of Information

Responses	Total 2004 (n=407)	Total 1999 (n=400)	Total 1988 (n=1206)
Internet/Valley Metro web site	31%	13%	-
Yellow Pages	24%	22%	-
Call transit service for info. /Advertised number	15%	38%	74%
Bus Book	14%	24%	-
At bus stops/shelters	8%	7%	6%
Library	4%	-	-
In the newspaper	3%	4%	4%
Friends/family member	2%	4%	-
Convenient locations	2%	1%	14%
Chamber of Commerce	2%	-	-
Distributed at work	1%	3%	1%
In the mail	-	2%	2%
Other	8%	7%	11%
Don't know/no answer	19%	9%	8%

34-1: How would you go about getting information about riding the bus? How else?

*In 1988 this question was worded slightly differently: "How would you go about getting information about bus schedules? How else?"

5. *Type of Information Desired at Bus Stops*

In a new question this year, non-riders were asked to indicate what information posted at bus stops they would find most helpful.

Not surprisingly, the top two requests were for bus times and frequency (mentioned by 67%) and route maps or information (58%). A few non-riders felt it would be helpful to have contact information posted – either phone numbers (3%) or web site information (1%). Information about fares was requested by 4% of the non-riders.

E. **Likelihood of Using Public Transit**

1. *Chances of Using any Public Transit in the Future*

Approximately half of the non-riders indicated there was either a “very good” (27%) or “good” (21%) chance they would use public transit in the Valley in the future. This is down slightly from 1999 (55% very good + good), but continues to be higher than in 1988 (43%). Unfortunately the percentage of those indicating there was “no chance at all” increased from 12% in 1999 to 23% in 2004.

Chances of Using Public Transportation in the Future

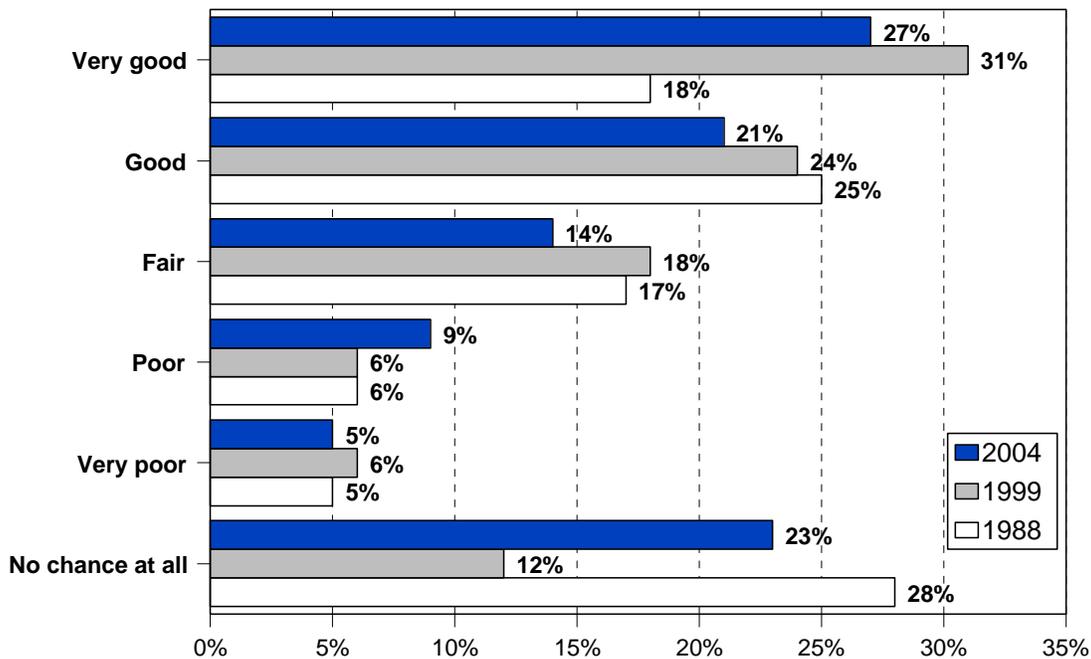


Table 12: Chances of Using City Transportation in Future -- Trend Data

Responses	Total 2004 (n=407)	Total 1999 (n=400)	Total 1988 (n=1206)
Good Chance (Very good + Good + Fair)	62%	73%	60%
Very good	27%	31%	18%
Good	21%	24%	25%
Fair	14%	18%	17%
Poor	9%	6%	6%
Very poor	5%	6%	5%
No chance at all	23%	12%	28%
Don't know	2%	2%	-

36-1: What would you say are the chances of getting you to use any type of public transit (including local and express bus service, neighborhood circulators, RAPID, Dial-a-Ride or the new light rail system) if you knew it would save you time or money to use one of these transit options instead of driving yourself? Would you say the chances are...?

*1999 question wording as follows: What would you say are the chances of getting you to ride the bus or a future rail system if you knew it would save you time or money to use the bus or take rail instead of driving yourself? Would you say your chances are...

*1988 question wording as follows: A number of ideas have been proposed to encourage people to ride the bus. What would you say are the chances of getting you to ride the bus if there were significant cost savings or major improvements to riding the bus?

Non-riders most likely to indicate there is a “very good” or “good” chance they will use transit in the future are:

- Those who have used transit in the past (73% vs. 57%)
- Those who have used transit in other cities (70% vs. 49%)
- Employed residents (67% vs. 57%)
- Non-rider ages 35 to 54 (73% vs. 55% of those age 55+)
- Tempe residents (90%)

Non-riders most likely to indicate there is “no chance at all” they will use transit in the future are:

- Those who have never used public transit in the Valley (27% vs. 13%)
- Those who have not used public transit in other cities (31% vs. 18%)
- Chandler (44%) and Gilbert (44%) residents

Table 13: Chances of Using City Transportation in Future -- 2004

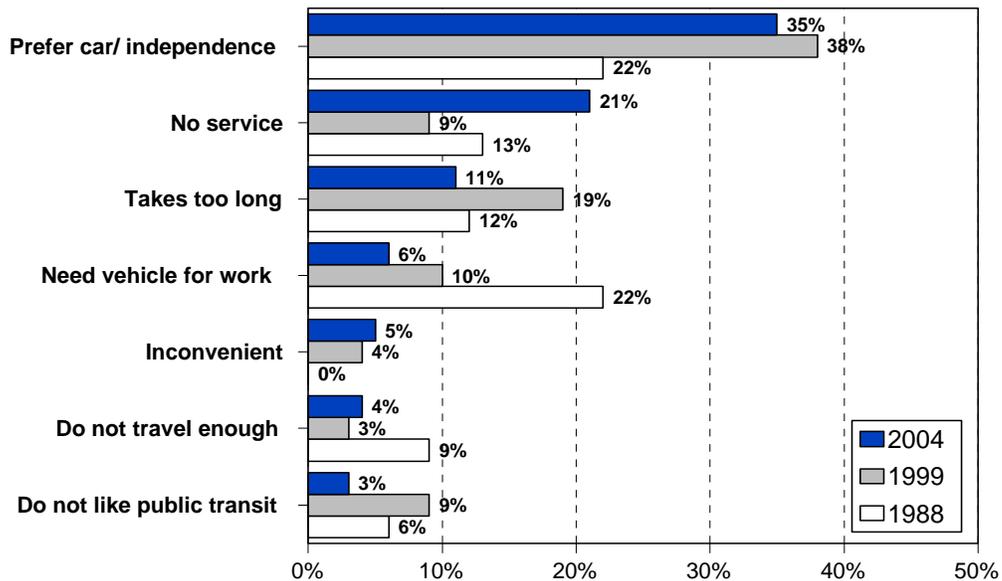
Responses	Total 2004 (n=407)	Past Transit Usage		Age		
		Never (n=251)	Past year or more (n=143)	18 – 34 Years (n=88)	35-54 Years (n=132)	55+ Years (n=171)
Good Chance (Very good +Good + Fair)	62%	57%	73%	66%	73%	55%
Very good	27%	23%	34%	24%	34%	23%
Good	21%	18%	27%	25%	17%	23%
Fair	14%	15%	13%	17%	21%	8%
Poor	9%	8%	10%	9%	6%	12%
Very poor	5%	6%	4%	6%	2%	6%
No chance at all	23%	27%	13%	18%	20%	25%
Don't know	2%	2%	1%	1%	-	2%

2. *Reasons not Likely to Ride Bus/Rail System in the Future*

As in the past, the primary reason residents are unlikely to use transit in the future is that they prefer the independence that comes from driving their own car (35%). Not having service in their area or feeling that the bus stops are too far away or a general feeling that transit does not meet their needs were mentioned by 21%. Approximately one in ten are not likely to ride in the future because they feel it would take too long to reach their destinations.

Reasons Not Likely to Use Public Transportation in the Future

(Among those indicating a poor, very poor, or no chance of riding in the future)



(n=149)

Table 14: Reasons not Likely to Ride Bus/Rail
 (Among those indicating a poor, very poor, or no chance of riding in the future)

Responses	Total 2004 (n=149)	Total 1999 (n=99)	Total 1988 (n=340)
Prefer car/ independence / no need for it	35%	38%	22%
No service/doesn't go where I want to go/ transit hours don't fit schedule	21%	9%	13%
Takes too long	11%	19%	12%
Need vehicle for work	6%	10%	22%
Inconvenience	5%	4%	N/A
Do not travel enough	4%	3%	9%
Handicapped	4%	1%	-
Do not like public transit	3%	9%	6%
Have children	3%	1%	2%
Don't know/Other	10%	2%	12%

37-1: What would you say is the main reason you are not likely to ride the bus or use rail service? (Among those answering poor, very poor, or no chance of using public transit in the future)

3. *Reasons for Preferring Driving to Using Public Transit*

When asked why they prefer driving over using public transportation, residents are most likely to once again reiterate their desire for independence (45%). Slightly more than one in twenty residents indicated they would not use transit because they do not feel safe (7%).

Table 15: Reasons Prefer Driving to Public Transit
 (Among those who indicated preference for driving over public transit)

Responses	Total 2004 (n=42)	Total 1999 (n=37)
Can go where I want/ independence / more convenient	45%	32%
Takes too long to get anywhere by bus	14%	24%
Have children/ easier to transport	12%	3%
No bus service in area work/live	10%	5%
Run errands/easier to transport packages	7%	8%
Don't feel safe/ safer to drive	7%	5%
Everything is close by	5%	-
Need vehicle for work/use company car	5%	5%
Because of age (elderly)	2%	3%
Value privacy/ driving alone	-	11%
Other	14%	-
Don't know	5%	3%

38-1: Please tell me more about why you prefer to drive your car instead of using public transit?

4. Circumstances for Consideration of Public Transit

The ability to use transit and make it to their destinations in the same amount of time as when they drive would be the primary motivator for non-riders to use public transit (mentioned by 25%). Better and/or increased service also is important to many non-riders (14% available service, 6% no transfers, 6% more convenient stops). Employed residents are most likely to use transit if they could get to places in the same amount of time (30% vs. 19% of those not employed).

Interestingly, for the first time, in 2004 non-riders indicated they are likely to give public transit a try if gas prices continue to increase or they knew it would save them money (6%). Fourteen percent will only ride if their car broke down or was unavailable.

Table 16: Circumstances for Consideration of Public Transit

(Among those indicating a very good, good, or fair chance of using transit in the future)

Responses	Total 2004 (n=252)	Total 1999 (n=292)	Total 1988* (n=867)
Get places in same amount of time	25%	18%	na
If car broke down/did not have car	14%	8%	na
Available in my area	14%	5%	na
No transfers	6%	15%	17%
More convenient stops/locations	6%	na	na
Saved rider money/gas prices keep increasing	6%	1%	na
Adjustable work hours	3%	11%	8%
Rail instead of bus	3%	10%	na
Service to sporting events	3%		
Limited stop service to work	2%	7%	na
Free parking at bus stop	2%	4%	na
Special discounts	1%	9%	11%
Special lanes for buses	1%	5%	10%
Received discounts from employer	1%	5%	9%
Guaranteed ride home in an emergency	1%	3%	na
Evening service	1%	16%	14%
Sunday service	-	9%	5%
Overall system improved	-	3%	na

39-1: Under what circumstances would you be willing to consider using public transit? What else? (Among those willing to ride transit in the future, answered very good, good or fair in Table 10)* In 1988, question worded: Which of these ideas would you say would be important to you?* All responses $\geq 1\%$ reported.

F. Employment and Commuting Information

Generally, the employment and commuter data collected in this study are relatively consistent with other studies conducted in the Metro area.

1. Employment Characteristics

Approximately half of the non-riders interviewed are employed either full time (43%) or part-time (10%).

Table 17: Employment Status

Responses	Total 2004 (n=407)
Full time employed	43%
Retired	33%
Homemaker	12%
Part time employed	10%
Student	6%
Unemployed	4%

12-1: Are you one or more of the following:...

2. *Commuting Characteristics*

Interestingly the length of the average commute for non-riders increased from 16.5 miles in 1999 to 23.5 miles in 2004, but the average time for that longer commute only increased by 1.5 minutes from 22 minutes to 23.5 minutes. The average length of the commute in miles has increased dramatically from 1988 when non-riders were only traveling an average of 10.8 miles to go to work.

The average distance a non-rider commutes increases as the income of the non-rider household also increases (10.9 miles for those with incomes less than \$30,000 per year; 23.3 miles for those earning \$30,000 to \$60,000; and 29.1 miles for those earning more than \$60,000). Tempe commuters report the shortest average commute of 7.7 miles while Chandler non-riders report an average commute distance of 39.2 miles.

Table 18: Commuting Characteristics

Responses	Total 2004 (n=212)	Total 1999 (n=284)	Total 1988 (n=736)
One-way Commute Distance			
0 to 4 miles	21%	22%	29%
5 to 9 miles	14%	18%	25%
10 to 14 miles	19%	19%	20%
15 to 19 miles	11%	10%	12%
20 to 29 miles	14%	16%	9%
30 to 39 miles	6%	5%	3%
40 to 49 miles	3%	1%	1%
50 miles or more	7%	5%	2%
Don't know	5%	na	na
Average	23.5 miles	16.5 miles	10.8 miles
One-way Commute Length			
5 minutes or less	13%	16%	na
6 to 10 minutes	14%	13%	na
11 to 15 minutes	14%	16%	na
16 to 25 minutes	22%	21%	na
26 to 50 minutes	24%	25%	na
Over 50 minutes	7%	5%	na
Don't know	6%	5%	na
Average	23.5 min.	22.4 min.	na

40-1: How many miles do you travel from home to work, one way, each day? (Among employed.)

41-1: On average, how long does it take you to travel from home to work, one way, each day? (Among employed.)

G. Residence in the Valley

1. Length of Residence

The average length of time non-riders interviewed have lived in the Valley has increased from 19 years in 1999 to 23 years on 2004.

Table 19: Length of Residence

Responses	Total 2004 (n=407)	Total 1999 (n=400)	Total 1988 (n=1206)
5 years or less	16%	17%	23%
6 to 10 years	14%	16%	14%
11 to 15 years	12%	14%	62%
16 to 25 years	23%	26%	
26 to 50 years	29%	25%	
Over 50 years	6%	2%	
Average	23 years	19 years	N/A

47-1: How long have you lived in the Valley?

2. Reasons for Moving to Valley

As in the past, non-riders primarily have moved to the Valley to be near family or to start a new job (22% and 22%). Slightly more than one in ten (12%) say they just wanted to move to the area. Fourteen percent (14%) of those interviewed were Arizona natives.

Table 20: Reasons for Moving to Valley

Responses	Total 2004 (n=407)	Total 1999 (n=400)	2004 Age		
			18-34 (n=88)	35-54 (n=132)	55+ (n=171)
Family	22%	28%	26%	26%	17%
Job transfer/job opportunity	22%	24%	17%	24%	22%
Didn't move/native	14%	14%	32%	14%	6%
Weather/climate	14%	-	6%	11%	19%
Just wanted to move to Phoenix/Southwest	12%	18%	4%	8%	19%
Health	4%	6%	-	3%	8%
School	4%	4%	10%	5%	-
Other	7%	6%	1%	8%	9%
Don't know	3%	1%	3%	1%	1%

46-1: Why did you move to the Valley?