



City of Tempe Transit Survey Report

October 2004

Prepared For:

City of Tempe

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Executive Summary

The City of Tempe commissioned WestGroup Research to complete a telephone survey of Tempe residents in an effort to gain insights into perceptions about public transit, among both riders and non-riders. This report analyzes the data collected by the survey and, where appropriate, compares responses of the residents by meaningful demographic variables, as well as to data from studies conducted in July of 1998, January of 2001, and January of 2003.

Random calls of Tempe residents were made from WestGroup's Interviewing Center in Phoenix, Arizona in the month of October, 2004. Households were selected by means of random digit dialing according to Tempe zip codes. The survey was completed with 405 Tempe residents. The margin of error for this sample size is approximately $\pm 4.9\%$ at a 95% confidence level.

Perceptions of Public Transit

- The term "public transit" generally brings to mind images of buses (64%). Light rail appears to be making a small inroad, though. In 1998 only 6% thought of light rail in response to this question, while currently 12% do so.
- Nearly half of Tempe residents feel public transit benefits "everyone" (47%). People without cars were also highly likely to be considered beneficiaries of public transit (26%), followed by ASU students (18%).
- Nearly nine in ten non-riders, or 86%, agreed they prefer to use their car rather than ride the bus. That the bus takes too long received support from 63% of the respondents; this is the second highest level of agreement for the ten reasons tested.
- Similarly, the most common reason respondents name for people not riding the bus is simply the convenience of having one's own car (16% unaided responses).

Potential Use of Tempe's Transit System

- Approximately two in five of those Tempe residents who have not ridden a bus within the past year noted they have ridden a bus in the Valley sometime in the past (42%). About 40% of those who have never used the bus system said they have thought about riding the bus.
- Currently, non-riders generally have a lower opinion of the local bus system's ability to transport them to common destinations. Around 45% of non-riders say they think the local bus service could help them get to and from shopping areas (vs. 66% in 2003 and 2001).
- Thirty-five percent (35%) of non-riders say having a car breakdown is the main circumstance that might get people to use the bus. The second most common situation non-riders brought up was not having any other transportation available (16%).

- About four in five non-riders feel riding the bus would have an effect on their daily routine (80%); specifically, many feel more time would be needed to make the various trips they take to get to and from places (52% of those who feel the bus would have an effect).
- This year very few mentioned positive impacts riding the bus would bring about--only 1% said riding the bus would make life more routine.
- A majority of non-riders say all five of the persuasive arguments posed to convince people to ride the bus were at least somewhat effective. Overall, riding the bus to help to lower air pollution was rated as most effective—75% indicated it was at least somewhat effective (rated “very + somewhat effective”).
- Tempe non-riders are most likely to use the Internet to find information about local bus services. Since 2001, use of the Internet as an information source for public transit has more than doubled (15% in 2001 to 36% currently).
- Over half of the riders who were asked what advice they would give someone considering using the bus said they would tell them to give it a try (53%).

Rider Characteristics and Opinions

- The percentage of Tempe residents reporting they have ridden a bus in Tempe in the past year remained unchanged at 36%. However, since 1998, the percentage of residents who are current bus riders in Tempe has risen from 22% (an overall increase of 64%).
- The percentage of riders who have been riding the bus for two or more years grew from 49% in 2003 to 55% currently. Additionally, the number of riders who have been using the system for one to two years was up to 17%.
- Riders are most likely to indicate the reason they ride the bus is because they do not have a car (36%). The second foremost reason riders take the bus is for convenience (26%).
- This year the top destinations of current Tempe bus riders were ASU (mentioned by 31%) and work (mentioned by 30%).
- More than one-third of Tempe bus riders have taken the bus to Arizona Mills Mall (37%). Those who have taken the bus to Arizona Mills Mall generally use one of three routes, namely 77/Baseline (19%), the 56 (14%), or the 92 (14%). A strong majority say the main reason they go to the mall is to shop (78%).
- As in the past, the largest proportion of bus riders surveyed say they do nothing other than look out the window while riding the bus (44%). Approximately 42% spend the time reading.

- As learned in past waves of this study, if there were no transit services in Tempe, many riders would simply drive themselves to their required destinations (43%). An additional 18% said they would get a ride from someone else.
- Currently more than half of the Tempe bus riders surveyed said they use the Bus Book to look up needed information (54%), while in 2003 about 41% mentioned use of the Bus Book and 27% in 2001; 26% say they look up bus schedule information online.
- Overall satisfaction with the Tempe bus system was rated at 91% (40% “very satisfied” + 51% “somewhat satisfied”).
- Comfort on the bus received the highest level of satisfaction ratings from Tempe bus riders. A solid 95% of the riders indicated they are at least somewhat satisfied with how comfortable they are on the buses.

Tempe in Motion

- Awareness of Tempe in Motion (TIM) among residents was measured at approximately 51% this year. This is the highest level of awareness ever recorded over the years of this study.
- Nearly three-fourths of those aware of TIM know it stands for “Tempe in Motion” (72%).
- Residents who were aware of TIM were most likely to indicate they became aware by seeing a street banner (28%).
- More than half of those aware of TIM remembered seeing ads for it (54%). When asked where they had seen the advertising, television was the most prominent response (50%), followed by street banners (26%), and print ads (16%).
- Those aware of TIM advertising say the message of the TIM ads was that riding a bus or bike is good for the environment (15%). More than half of those aware of the TIM advertising felt it had a positive effect on their perceptions of the bus system in Tempe (53%).

Miscellaneous Issues

- Greater than one-third of the Tempe residents surveyed said new services to the bus system in town should be introduced to residents through direct mail (35%).
- Similar to findings from previous years of this tracking study, approximately 57% of the residents surveyed have access to a bike.
- On the whole, bicycles are generally ridden for the purpose of exercise (58%); this has been the case for every wave of this study over the past six years.

- Nearly nine in ten Tempe residents are aware of the planned Light Rail Transit System currently in the works (87%). Overall, about three in five said they would be likely to try it once it opens in late 2008 (60% very + somewhat likely).

Conclusions

1. Overall, bus ridership in Tempe remains higher than across the Valley in general. Although the percentage of residents who are current riders did not increase from 2003 to 2004, there appeared to be a lower turnover rate within the riding population. This means riders are continuing to find the bus to be a convenient transportation option.
2. The convenience of riding the bus is a strong motivator for a large portion of bus riders. In fact, most riders appear to be riding out of choice and not because other forms of transportation are not available. More than half of the riders indicated they would drive themselves or ride with others if the bus would not be available.
3. A high level of satisfaction with the bus service in Tempe is most likely another contributor to the lower turnover rate among riders. Not only does riding the bus fit their lifestyle, it also offers a positive riding experience.
4. The Internet continues to grow as a source of information about transit service among riders and non-riders.
5. Awareness of TIM was at an all time high and understanding of its message that riding the bus is convenient and easy was clearly communicated in 2004. However, the percentage of non-riders who were aware of bus service to and from common destinations such as work, school, and shopping decreased significantly since 2003. It is possible that non-riders believe the message that bus riding is convenient and easy for some people for specific trips, but they have lost site of the extent of bus service available and the transportation alternative it could be for travel to many destinations. It may be necessary to add a “destination” component to the next marketing campaign for TIM – highlighting all the places riders go using the bus.

I. Introduction

A. Background

The City of Tempe commissioned WestGroup Research to complete a telephone survey of Tempe residents in an effort to gain insights into perceptions about public transit, among both riders and non-riders. This report analyzes the data collected by the survey and, where appropriate, compares responses of the residents by meaningful demographic variables, as well as to data from studies conducted in July of 1998, January of 2001 and January of 2003

Random calls of Tempe residents were made from WestGroup's Interviewing Center in Phoenix, Arizona in the month of October, 2004. Households were selected by means of random digit dialing (RDD) according to Tempe zip codes. A quota was set to achieve equal representation of men and women. An RDD 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.

The survey was completed with 405 Tempe residents. The margin of error for this sample size is approximately $\pm 4.9\%$ at a 95% confidence level. Cross tabulations of the data collected in this survey are included under a separate cover.

B. Demographics

As previously mentioned, half of the respondents are male and half are female. The table on the following page gives a more detailed summary of these characteristics.

Table A: Demographics

	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Gender				
Male	49%	50%	50%	50%
Female	51%	50%	50%	50%
Years Lived in Tempe				
<1 year	8%	8%	10%	8%
1 – 2 years	14%	11%	13%	12%
3 – 5 years	12%	16%	15%	20%
6 – 10 years	14%	18%	14%	17%
11 – 20 years	18%	16%	13%	16%
20+ years	34%	30%	34%	26%
Age				
18 – 34	31%	31%	34%	33%
35 – 49	29%	29%	25%	32%
50+	39%	36%	40%	35%
Average	45.8	44.2	44.9	44.7
Education				
Some high school	2%	3%	3%	4%
High school graduate	12%	12%	12%	13%
Some college	34%	26%	40%	36%
College graduate	26%	29%	26%	27%
Post graduate	23%	27%	19%	18%
No answer	2%	4%	1%	2%
Income				
<\$20,000	15%	12%	15%	12%
\$20 - \$40,000	20%	19%	21%	29%
\$40 - \$60,000	17%	18%	18%	19%
\$60 - \$80,000	12%	14%	10%	12%
\$80 - \$100,000	5%	5%	7%	6%
\$100,000+	10%	13%	10%	8%
Average	\$53,700	\$57,700	\$53,500	\$48,600

Slightly more than half of the respondents indicated they are currently married (53%), and 23% have teenagers residing in their household. Of those households with teenagers, 38% indicate their teens ride the city bus. A strong majority of respondents have Internet access from their home (83%). Finally, a wide variety of occupations were represented, with the largest proportion being professional/technical (32%), followed by retirees (15%).

Table B: Demographics

	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Marital Status				
Married	53%	47%	48%	50%
Single	44%	48%	52%	47%
Teenagers in HH	23%	17%	20%	na
Teens ride city bus	38%	30%	46%	na
Internet Access	83%	83%	78%	na
Occupation				
Professional/technical	32%	24%	30%	26%
Retired	15%	14%	16%	15%
Manager/proprietor	13%	13%	7%	11%
Student	11%	9%	15%	8%
Clerical	3%	8%	3%	8%
Sales	6%	6%	5%	5%
Housewife/househusband	6%	5%	6%	7%
Unemployed/disabled	2%	5%	3%	3%
Craftsman/trade/laborer	4%	3%	8%	10%
Service worker	4%	3%	3%	6%
Refused	2%	8%	4%	3%

II. Perceptions of Public Transit

A. Top of Mind Images

Overwhelmingly, the term “public transit” initially brings images of buses to the minds of Tempe residents (64%). Buses have long been the top-of-mind image Tempe residents think of when they hear the term “public transit.” Other bus-associated thoughts were also brought out by this question. For example, 5% said the term “public transit” reminded them of the inadequate local bus system. Also, 3% said there are not enough buses and 2% specifically name Tempe Transit or Valley Metro (each).

On the other hand, thoughts of light rail (or monorail) are newer images that appear to be growing in the minds of residents, most likely due at least in part to current ballot initiatives. In 1998 only 6% thought of light rail in response to this question, while currently 12% do so.

Table 1: Images of Public Transit

Responses	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Buses	64%	67%	68%	66%
Monorail/light rail	12%	10%	10%	6%
Reduces traffic congestion	6%	2%	2%	4%
Subways	5%	5%	4%	6%
Inadequate bus system	5%	3%	4%	18%
Not enough buses	3%	1%	2%	4%
Trains	3%	6%	5%	10%
Tempe Transit (Flash, TIM, general)	2%	2%	-	-
Empty buses	2%	1%	2%	-
Waste of money	2%	-	1%	2%
Valley Metro	2%	-	-	-
Inconvenient times/schedule	1%	3%	1%	4%
Routes not well planned	1%	2%	2%	4%
Taxis	1%	2%	2%	2%
Trolleys	1%	1%	2%	2%
Good for environment	1%	1%	2%	-
People waiting for buses	1%	1%	2%	2%
Roads/freeways	1%	1%	2%	-
Getting stuck behind a bus in rush hour	1%	1%	-	-
Mode of transportation	-	2%	2%	2%
Don't know/nothing	5%	4%	9%	3%

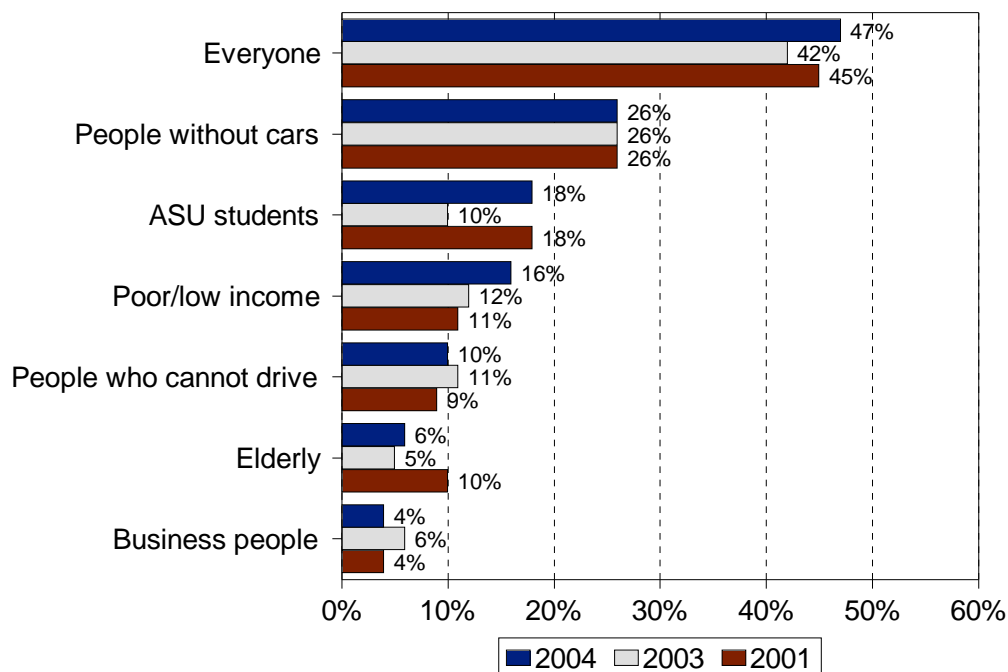
5:1 What is the first image that comes to your mind when you hear the words “public transit”? What other thoughts?

B. Who Benefits from Public Transit Services

Nearly half of Tempe residents feel public transit benefits “everyone” (47%). This is slightly higher than the 42% measured in 2003, but is more closely aligned with the 45% reported in 2001. As might be expected, those who have ridden the bus within the past year were significantly more likely to say public transit benefits everyone (64%). Additionally, residents between the ages of 35 and 49 were more likely to express this point of view (57% vs. 38% of those younger and 48% of those older).

People without cars were also highly likely to be perceived as those who would benefit from public transit (26%). Similarly, “poor people” or those with lower incomes were thought to be those who might benefit (16%). ASU students were another group thought to be potential beneficiaries (18%).

Perceived Beneficiaries of Public Transit



2004 n=405

Table 2: Those Who Benefit from Tempe Public Transit

Those who benefit	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Everyone	47%	42%	45%	43%
People without cars	26%	26%	26%	31%
Students at ASU	18%	10%	18%	15%
Poor/low income people	16%	12%	11%	14%
People who can't drive	10%	11%	9%	7%
Elderly	6%	5%	10%	8%
Young people	5%	3%	7%	4%
Business people	4%	6%	4%	5%
Disabled population	4%	-	1%	-
Working class	2%	1%	2%	2%
Environment	1%	2%	2%	-
Tempe City Government, politicians, bureaucrats	-	1%	-	-
Tempe residents/taxpayers	-	1%	1%	3%
Other	3%	5%	5%	18%
No one benefits	1%	3%	1%	2%

6:1 In your opinion, who benefits from having public transit in Tempe?

C. Perceptions of Riding the Bus

1. Non-Rider Perceptions- Agreement with Reasons

In the next phase of the survey ten potential reasons for not wanting to ride the bus were presented and respondents were asked to indicate if they agreed with each reason or not.

Historically, Tempe residents have agreed most strongly with preferring to use their car, and this year the results supported that trend. Greater than four in five respondents, or 86%, agreed with this statement; single respondents, though, were significantly more likely than married residents to say they prefer to use their car (94% vs. 82%, respectively).

Two other reasons received agreement from more than half of the Tempe residents who have not ridden the bus within the past year. First, that the bus takes too long was agreed to by 63% of the respondents. And second, 59% agreed that they need their vehicle for business purposes. Both of these reasons have rounded out the top three responses to this question throughout the four years of this tracking study.

It is interesting to note 34% agree they do not ride because they do not know how to use the bus. Those likely to express this opinion included a large proportion of younger respondents (43% of those under the age of 35). Potentially, marketing strategies with an instructional premise may help to educate and inform this group of residents in an effort to boost ridership.

Table 3a: Reasons for Not Riding Bus
(Among those who have not ridden a bus in the past year)

% Agree	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)
Prefer car	86%	86%	81%	80%
Takes too long	63%	67%	56%	59%
Need car for business	59%	57%	50%	52%
Not frequent enough	34%	43%	35%	54%
Don't know how to use bus	34%	41%	35%	32%
Bus stop far away	25%	26%	30%	32%
Bus stops not safe	19%	24%	20%	-
Buses are dirty	10%	11%	7%	12%
Don't like people on bus	11%	10%	7%	8%
Buses not safe	8%	7%	8%	11%

10:1-20:1 -- People tell us different reasons why they do not ride the bus. You may or may not think the statements are true for you. I will read you several statements, and would like you to tell me which ones you agree are reasons you do not ride the bus.

Table 3b: Reasons for Not Riding Bus- Demographic Breakdown
 (Among those who have not ridden a bus in the past year)

% Agree	Total 2004 (n=257)	Education			Age		
		HS or Less (n=36)	Some College (n=86)	College Grad (n=129)	18-34 (n=67)	35-50 (n=71)	50+ (n=117)
Prefer car	86%	89%	88%	84%	91%	86%	84%
Takes too long	63%	56%	62%	66%	72%	62%	57%
Need car for business	59%	67%	59%	57%	69%	65%	50%
Not frequent enough	34%	36%	33%	34%	33%	32%	35%
Don't know how to use bus	34%	36%	35%	32%	43%	25%	33%
Bus stop far away	25%	39%	19%	26%	24%	28%	24%
Bus stops not safe	19%	44%	19%	12%	22%	13%	20%
Buses are dirty	10%	3%	10%	11%	15%	7%	8%
Don't like people on bus	11%	8%	14%	11%	24%	7%	7%
Buses not safe	8%	19%	8%	5%	12%	1%	9%

2. *Non-Rider Perceptions- Other Reasons*

The most common reason respondents name for people not riding the bus is simply the convenience of having one's own car (16%). This thought was also voiced in 2003 by 12% of the non-rider respondents. This year 20% of non-riders over the age of 50 expressed this opinion (significantly more than the 9% of mentions by those under age 35). **There was also a large increase in the proportion of Tempe residents indicating one of the reasons they do not ride the bus is because the system does not go where they need to go.** In 2003 4% gave this answer, while this year it was the second most common response at 12%.

Table 4: Other Reasons for Not Riding Bus

Responses	Total 2004 (n=257)	Total 2003 (n=255)
Have their own vehicles/convenience of driving	16%	12%
Doesn't go where they need to go	12%	4%
Inconvenience of taking the bus	11%	17%
Takes too long	9%	9%
Too hot or cold/raining	4%	8%
People need vehicle for work/pick up kids/run errands	4%	5%
Inconvenient bus schedule times	4%	4%
Unaware of bus schedule times and routes/don't know how to use bus system	4%	3%
Buses don't come by often enough/long wait times	3%	2%
Too many transfers/no direct routes	3%	4%
Not safe	2%	1%
Too expensive	2%	2%
Bus stops have no shade	1%	2%
Buses are unreliable/not on time/break down	-	4%
Bus stop too far from home/destination	-	8%
Other	9%	7%
None	11%	14%
Don't know/no answer/refused	13%	16%

22-1: What other reasons can you think of why people do not ride the bus? (Among those who have not ridden a Tempe bus in the past year).

III. Potential Use of Tempe's Transit System

A. Past Ridership and Consideration of Riding

Approximately two in five of those Tempe residents who have NOT ridden a bus within the past year report they have used a bus in the Valley sometime in the past (42%). This is slightly higher than the 37% measured in 2003. Those who have ridden in the past were generally respondents with at least some college education (44%) and those over the age of 35 (45%).

Those who have NEVER ridden the bus in the Valley were asked if they have ever thought about using the bus system. About 40% said they have thought about riding the bus, a result that has been relatively steady over the life of this study. Those with some college education (56%) were significantly more likely than those with only a high school education (30%) or a college degree (33%) to have thought about riding the bus.

Table 5: Use of Buses in Valley

	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)
Have ridden in Valley	42%	37%	41%	38%
	(n=148)	(n=160)	(n=170)	(n=189)
Have thought about riding	40%	42%	38%	37%

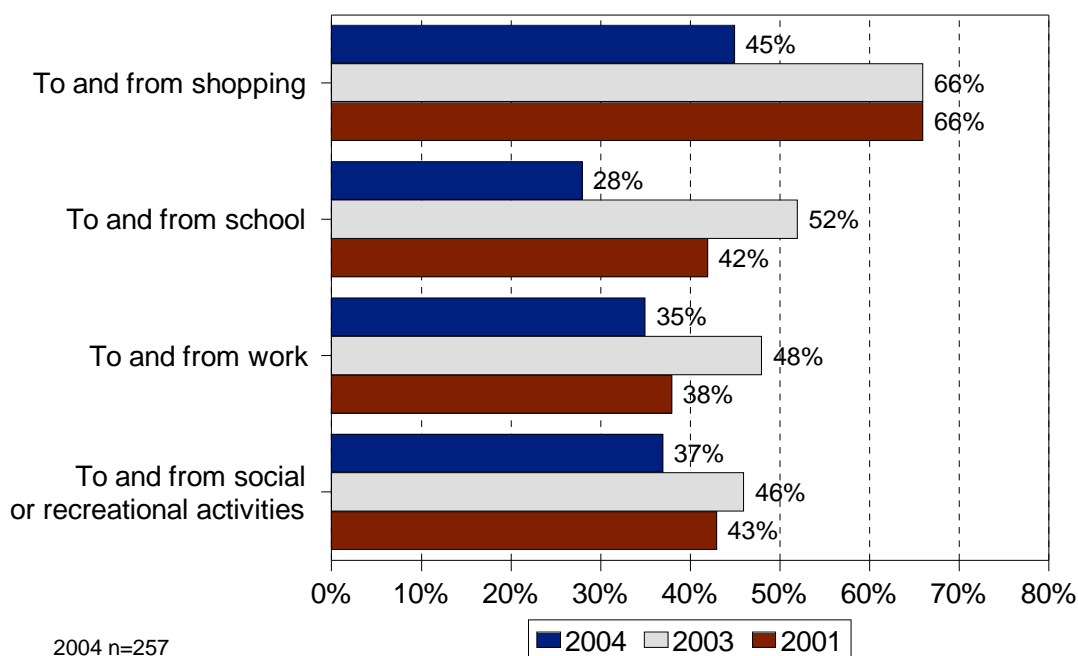
8:1 and 9:1 - Have you ever ridden a bus in the Valley? (Among those who have not ridden a bus in Tempe in the past year.) Have you ever thought about riding the bus? (Among those who have not ridden a bus in the Valley.)

B. Awareness of Bus Services

Compared to 2003, Tempe residents who have not ridden the bus in the past year appear to be less likely to believe the bus service can help them reach common destinations. For example, only 45% say they think the local bus service could help them get to and from shopping areas (vs. 66% in 2003 and 2001). There were declines in the other three common destinations also tested. The most dramatic drop was that 28% reported they thought the local bus service could help them get to and from school. This is down from 52% reported last year.

Aware of Bus Service Destinations

From what you know, do you think there are currently is local bus service that you could take to get... ?



As demonstrated in the following table, **non-riders with some college education were those most likely to think the local bus service had the capability of getting them to and from common destinations.** Half, or 50%, said they think there is currently service that could get them to and from shopping; 41% felt the bus could get them to and from social and recreational activities.

Conversely, older non-riders had a lower opinion of the current bus system's capabilities. Those over the age of 50 were less likely than those younger to feel the bus could get them to and from common destinations. For example, only three in ten (30%) said they thought the bus could transport them to and from work.

Table 6: Awareness of Bus Services

Percent Responding Yes	2004 (n=257)	Education			Age		
		HS or less (n=36)	Some College (n=86)	College Grad+ (n=129)	18-34 (n=67)	35-50 (n=71)	50+ (n=117)
To and from shopping	45%	28%	50%	45%	49%	45%	43%
To and from school	28%	25%	33%	24%	37%	31%	21%
To and from work	35%	39%	35%	33%	37%	42%	30%
To and from social and recreational activities	37%	36%	41%	36%	36%	44%	34%

31:1 -- From what you know, do you think there currently is local bus service that you could take to get...? (Among non-riders)

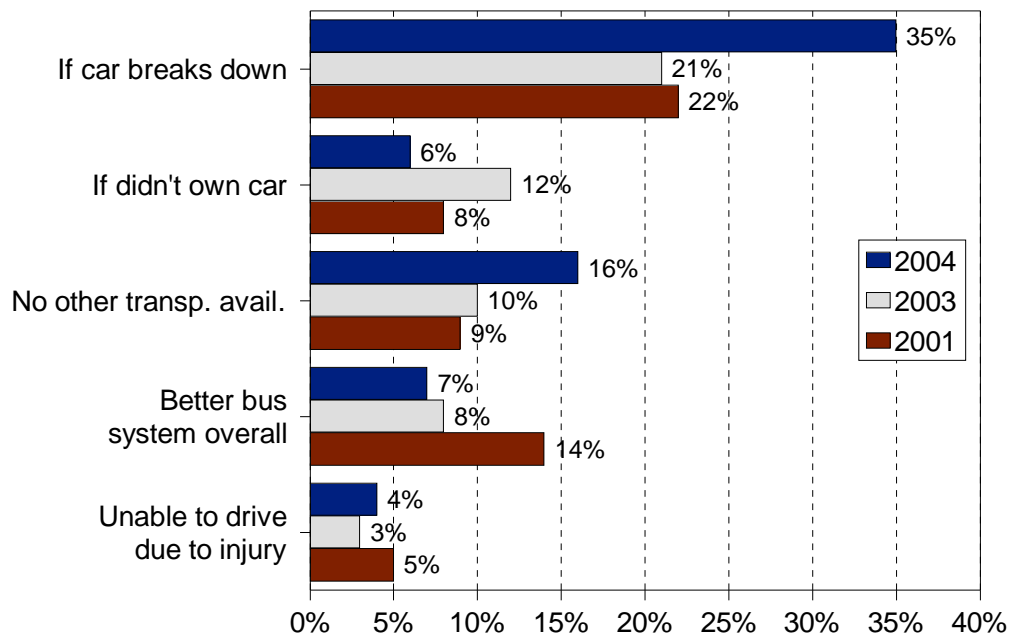
C. Circumstances for Taking the Bus

Non-riders were asked to give specific circumstances that would make them consider taking a bus. As in previous years, **having a car breakdown is the most commonly mentioned circumstance that might get people to use the bus. However, this year mentions of this idea are up significantly to 35% (from 21% in 2003).** Non-riders who are female (42%) and those under the age of 35 (51%) were significantly more likely to say they would consider riding the bus if their car broke down. About 44% of those with some college education mentioned this circumstance, as well.

Similarly, the second most common circumstance non-riders brought up was not having any other transportation available. Sixteen percent (16%) said they might consider using the bus if they had no other transportation. In 2003, approximately 10% mentioned this thought.

Circumstances that would Cause Residents to Consider Riding the Bus

(Among those who have not ridden in the past year.)



Over the years of this tracking study it is apparent some shifts in public mindset have occurred. One of these changes is demonstrated in the proportion of Tempe residents who indicate they would be willing to ride the bus if the system were improved overall. In 1998 one in four non-riders expressed this opinion (25%). Since then fewer and fewer non-riders have expressed this willingness, until currently only 7% do so. It is unclear exactly why Tempe non-riders are unwilling to try the bus, even if the system were improved. It is possible residents are aware of the increased service that has occurred over the past 6 years and are less likely to see a need for the service to be improved.

Table 7: When Residents would Consider Taking the Bus
(Among those who have not ridden a bus in the past year)

Circumstances	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998* (n=401)
If car breaks down	35%	21%	22%	14%
No other transp. available	16%	10%	9%	10%
Convenience/faster	8%	4%	-	2%
Better bus system overall	7%	8%	14%	25%
If didn't own car	6%	12%	8%	9%
Going to event with parking problems	6%	3%	4%	3%
If lost driver's license	6%	1%	1%	-
Job closer to home	4%	1%	3%	-
If unable to drive due to illness or injury	4%	3%	5%	-
Daytime activity	2%	5%	1%	2%
If cheaper	1%	1%	1%	-
To go shopping	1%	2%	2%	2%
Direct routes/no transfers	-	4%	-	-
If had better explanation of the bus system	-	1%	2%	2%
Going to downtown Tempe	-	1%	-	-
Going to downtown Phoenix	-	1%	1%	-
If didn't need car for work	-	1%	-	-
If bus ran 24 hours	-	-	2%	1%
If forced to	-	-	1%	2%
Other	8%	18%	15%	19%
None/Wouldn't ride bus	15%	11%	13%	12%
Don't know/not sure	5%	6%	5%	1%

28:1 Under what circumstances do you think you would consider taking the bus?

*Asked of all respondents in 1998

D. Effects on Daily Routine

About four in five non-riders feel riding the bus would have an effect on their daily routine (80%); specifically, many feel more time would be needed to make the various trips they take to get to and from places (52% of those who feel the bus would have an effect). The effect of time has been the top concern mentioned by non-riders in all four waves of this study. Among current respondents, those under the age of 35 (67%) were significantly more likely than those over 35 (46%) to feel riding the bus would require more time for trips.

Other commonly referenced negative impacts of riding the bus included not being able to come and go as they wanted (12%), having to change their schedule to accommodate the bus (11%), and the need to plan ahead (4%). This year very few mentioned impacts that would have positive results: only 1% said riding the bus would make life more routine.

Table 8: Effects on Routine
(Among those who have not ridden a bus in the past year)

	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)
Would affect routine	80%	80%	77%	70%
Ways would effect	(n=205)	(n=203)	(n=223)	(n=220)
<i>Negative Impact</i>				
More time for trip	52%	45%	52%	27%
Could not go/leave as please	12%	12%	12%	8%
Change schedule to accommodate bus	11%	9%	11%	6%
Plan ahead of time	4%	6%	10%	2%
Doesn't go where I need to	4%	2%	3%	-
Can't depend on bus	2%	3%	4%	3%
Don't go same place every day	2%	2%	8%	6%
Difficult if child care drop-off	2%	2%	3%	-
Walk to and from destination	2%	4%	3%	3%
Couldn't carry a lot of things	2%	2%	2%	1%
Cost more	2%	-	-	-
Stressful worrying if will catch bus	-	2%	-	-
<i>Positive Impact</i>				
Makes day more routine	1%	9%	3%	1%
Would make less errands	-	4%	3%	-
More relaxing	-	1%	2%	1%

33-34: - Do you think taking the bus would affect your daily routine? In what way would this affect your routine? (Among those who said that taking the bus would affect their daily routine.)

E. Effectiveness of Persuasive Arguments

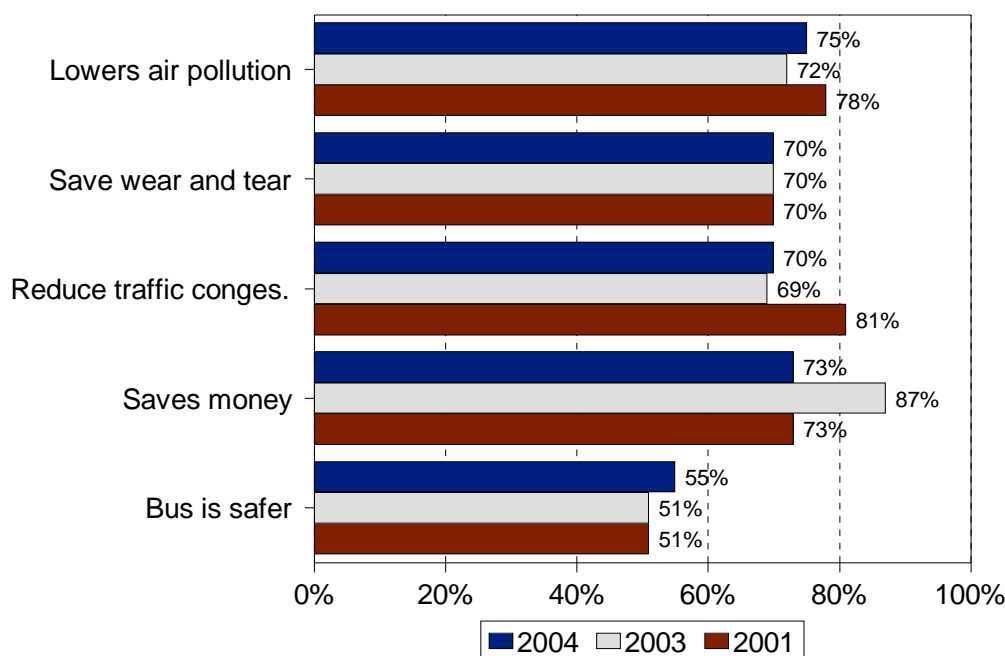
1. Agreement with Aided Arguments

In the next part of the survey non-riders were asked to rate the effectiveness of five arguments for using public transportation. Ratings were completed on a four-point nominal scale (“very effective,” “somewhat effective,” “not very effective,” and “not at all effective”).

A majority of non-riders say all five of the arguments posed were at least somewhat effective. Overall, the fact that riding the bus helps to lower air pollution was rated as most effective—75% indicated it was at least somewhat effective (rated “very + somewhat effective”). This was closely followed by riding the bus saves money, which received 73% “very + somewhat effective” ratings. In 2003 saving money was rated as the most persuasive argument (87% “very + somewhat effective”). Although current pump prices remain higher than recent years, Tempe residents seem to have grown accustomed to higher costs of driving.

Persuasive Arguments

Very + Somewhat Effective



As mentioned above, more than half of Tempe's non-riders rated each of the five persuasive arguments for transit usage as being at least somewhat effective. **In four of the five arguments presented, younger respondents appear to rate the effectiveness of the arguments more positively than older respondents.** For example, 79% of those under age 50 indicated they felt the claim "lowers air pollution" was effective, while 71% of those over 50 agreed. Additionally, the younger respondents were more likely to agree riding the bus saves money (82% of those under 35 rate "very + somewhat effective" vs. 66% of those over age 50).

Table 9: Effectiveness of Reasons to Persuade Transit Usage

	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)	2004 Age		
					18-34 (n=67)	35-50 (n=71)	50+ (n=117)
Lowers air pollution							
Effective*	75%	72%	78%	76%	79%	79%	71%
Not effective**	23%	25%	17%	21%	18%	21%	26%
Save wear/tear							
Effective	70%	70%	70%	77%	78%	70%	68%
Not effective	28%	25%	27%	21%	21%	30%	29%
Less traffic congest.							
Effective	70%	69%	81%	79%	73%	70%	69%
Not effective	27%	28%	16%	18%	25%	30%	26%
Save money							
Effective	73%	67%	73%	71%	82%	75%	66%
Not effective	25%	29%	23%	28%	15%	25%	31%
Bus is safer							
Effective	55%	51%	55%	55%	54%	55%	56%
Not effective	40%	42%	37%	40%	42%	45%	38%

28:1 – 29:1 For each of the following benefits to riding the bus, please indicate how effective it would be in persuading you to ride the bus instead of using your current mode of transportation. Would it be very effective, somewhat effective, not very effective, or not at all effective?

* Very + Somewhat effective ** Not very + Not at all effective

2. *Other Persuasive Benefits of Riding The Bus (Unaided)*

There were very few new persuasive benefits non-riders could think of as reasons to ride the bus; most thoughts were simply reiterations of previously mentioned ideas (i.e., 7% lower cost, 2% helps reduce air pollution). The convenience of door-to-door service (7%), and being able to relax/read while riding (6%), were two concepts a small proportion of the non-riders were able to suggest.

Table 10: Other Reasons for Riding Bus

Responses	Total 2004 (n=257)	Total 2003 (n=255)
It's a lower cost of transportation	7%	5%
If bus stops were closer to home/destination/door to door service would be convenient	7%	4%
Ability to read/relax while riding	6%	4%
More frequent service	5%	1%
Avoid driving in traffic/less traffic	4%	2%
Faster service	3%	4%
Not having a car/no car available	2%	2%
Cuts down on pollution/helps air quality	2%	4%
Unable to drive/disabled/drunk/lost license	2%	1%
More reliable/more on time performance	1%	1%
More direct routes/less transfers	1%	2%
Not having to find parking	1%	6%
Free bus service	1%	2%
More hours of operation/24 hours	1%	2%
Knowing bus schedule/locations/how to ride	-	2%
Other	12%	7%
None	29%	34%
Don't know/no answer/refused	18%	27%

30-1: *What other benefits to riding the bus can you think of that might persuade you to try the bus instead of using a car to travel around town? (Among those who have not ridden a Tempe bus in the past year).*

F. Finding Information

This year Tempe non-riders are most likely to use the Internet to find information about their local bus services. Since 2001, use of the Internet as an information source for public transit has more than doubled (15% in 2001 to 36% currently). It appears Tempe residents are using the Internet instead of making a personal phone call to Valley Metro or the City of Tempe. In the same time period, while use of the Internet has dramatically increased, the proportion of non-riders saying they would call has declined significantly (calls to Valley Metro down from 29% to 16%). Use of the Bus Book, though, appears to be holding steady (17% currently note they would find bus information in the Bus Book).

Bus Service Information Sources

(Among those who have not ridden in the past year.)

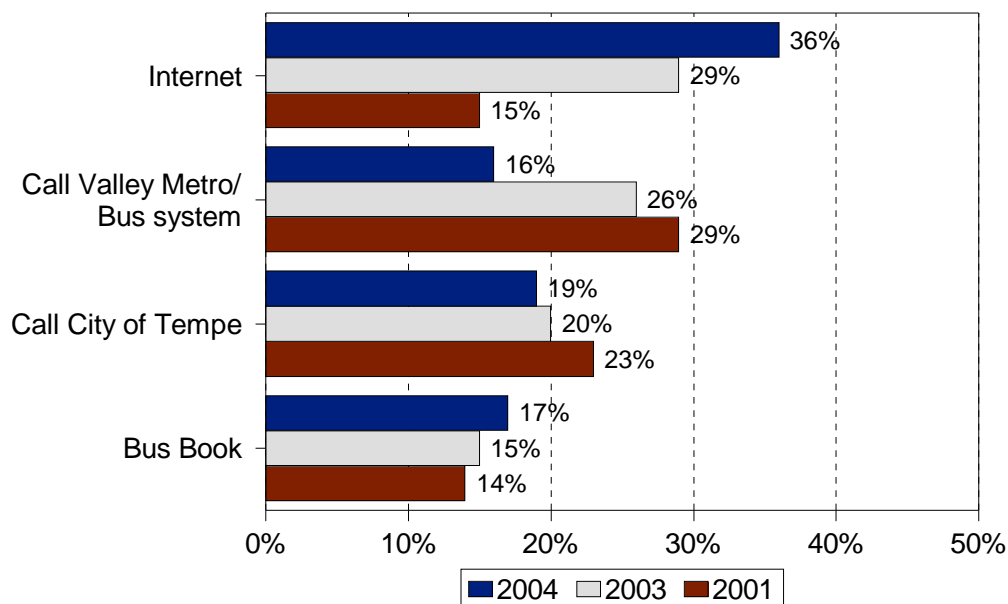


Table 11b on the following page shows those most likely to use the Internet as a source of bus and transit information are generally under the age of 50 (47%) and have completed a college education (46%). Residents over age 50 were highly likely to say they would call Valley Metro or the City of Tempe if they needed bus information (25% and 26%, respectively). Bus Book users are of all ages, but tend to have a lower level of education (about 21% some college education or less).

Table 11a: Finding Information about Bus Services
(Among those who have not ridden a bus in the past year)

Responses	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)
Internet	36%	29%	15%	2%
Call Valley Metro/bus system	16%	26%	29%	38%
Call City of Tempe	19%	20%	23%	26%
Look for a Bus Book	17%	15%	14%	17%
Public Library	6%	7%	6%	5%
Yellow pages	2%	5%	5%	7%
Schedules at bus stops	1%	2%	5%	-
Ask a friend/family member	6%	2%	2%	2%
Senior Center	1%	-	-	-
Bus Driver	-	2%	1%	2%
Work	-	1%	-	-
ASU	-	-	1%	1%
Other	3%	5%	3%	7%
Don't know	-	8%	8%	-

Table 11b: Finding Information about Bus Services
(Among those who have not ridden a bus in the past year)

Responses	2004 Age			2004 Education		
	18-34 (n=67)	35-50 (n=71)	50+ (n=117)	HS or less (n=36)	Some college (n=86)	College Grad + (n=129)
Internet	48%	46%	24%	22%	27%	46%
Call Valley Metro/bus system	8%	8%	25%	14%	15%	18%
Call City of Tempe	13%	13%	26%	14%	19%	19%
Look for a Bus Book	18%	18%	15%	22%	20%	13%
Public Library	9%	7%	4%	11%	5%	6%
Yellow pages	-	1%	3%	3%	1%	2%
Schedules at bus stops	-	1%	1%	-	1%	1%
Ask a friend/family	10%	7%	2%	3%	9%	4%
Don't know	8%	7%	9%	14%	10%	6%

35:1 -- If you were interested in riding a bus in Tempe, how would you go about getting information about the system?

G. Advice for Potential Riders

Over half of the riders who were asked what advice they would give someone considering using the bus said they would tell them to give it a try (53%). In fact, three in four gave advice that was of a positive nature (i.e., the bus provides good service 8%, bus is convenient 5%). Others gave practical advice, such as checking their route ahead of time (14%) and leaving plenty of time (5%).

Only 6% of the riders gave negative feedback. Generally they said they would tell someone who is considering riding the bus to do so only as a last resort (2%) because the bus is always late and takes too long (1%).

Table 12: Advice for New Riders
(Among those who have ridden in the past year)

Responses	2004 (n=148)	2003 (n=146)	2001 (n=115)
Positive			
Give it a try	53%	36%	28%
Bus provides good service	8%	14%	2%
Bus is convenient	5%	-	-
Cheaper than a cab	5%	3%	15%
Less stress	2%	1%	4%
Good for environment	1%	6%	14%
Safer than driving car	1%	-	-
Practical/Neutral			
Check route and make a schedule	14%	10%	6%
Make sure you know where bus is going	-	3%	2%
Use bus if have flexible timing	1%	2%	-
Leave enough time	5%	1%	6%
Depends on the situation	3%	1%	24%
Have money ready	-	1%	2%
Negative			
If have own car use it, if not ride bus	3%	7%	-
Takes too long/bus is always late	1%	3%	-
Use as last resort/Don't do it	2%	-	4%
Other			
Don't know/not sure	6%	14%	4%

44:1 -- If someone asked you whether or not they should start riding the bus, what advice would you give them?

IV. Rider Characteristics and Opinions

A. Current Use of Public Transit

The percentage of Tempe residents reporting to have ridden a bus in Tempe in the past year remained steady at 36% this year. Since 1998 growth of riders in Tempe has risen from 22%. This year the proportion of those who have used the bus 20 or more times in the past year is slightly higher than in 2003 (14% currently; 10% 2003) and is double what was measured in 2001. As shown in Table 13b, those who have ridden 20 or more times in the past year were most likely to be those with incomes under \$40,000 (20%) and residents under age 35 (22%). Overall, male Tempe residents were more likely than female residents to have ridden the bus within the past year (41% vs. 32%, respectively).

Table 13a: Frequency of Riding Bus in Tempe Past Year

#Times	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
1 – 5 times	16%	18%	18%	13%
6 – 10 times	5%	5%	3%	2%
11 – 20 times	2%	3%	1%	2%
20+ times	14%	10%	7%	5%
NET RODE	36%	36%	29%	22%
None	63%	61%	72%	78%

Table 13b: Frequency of Riding Bus in Tempe-2004 Demographic Breakdown

	Gender		Age			Income	
	Male (n=200)	Female (n=205)	18-34 (n=125)	35-50 (n=118)	50+ (n=159)	<\$40K (n=144)	\$40K+ (n=184)
1 – 5 times	17%	14%	15%	19%	13%	19%	17%
6 – 10 times	6%	4%	7%	2%	5%	7%	3%
11 – 20 times	3%	2%	2%	3%	1%	4%	2%
20+ times	16%	12%	22%	15%	7%	20%	9%
NET RODE	41%	32%	46%	40%	26%	50%	31%
None	59%	66%	54%	60%	72%	49%	68%
Don't know	-	2%	-	-	2%	1%	1%

7:1 How many times have you ridden on a bus in Tempe in the past year?

B. Length of Use of Transit System

The percentage of riders who have been riding the bus for two or more years grew from 49% in 2003 to 55% currently. Additionally, the percentage of riders who have been using the system for one to two years is up slightly to 17%. However, the proportion of those who have been using the bus for six months or less is somewhat lower than the figures reported in 2003. While 26% of the 2003 riders had only been using the system for 6 months or less, this year about 18% of the riders fit in that category.

Table 14: Length of Use of Transit System
(Among those who have ridden in the past year)

Time Riding	2004 (n=148)	2003 (n=146)	2001 (n=115)	1998 (n=87)
Less than a month	7%	7%	9%	16%
1 – 3 months	7%	9%	10%	6%
4 – 6 months	4%	10%	15%	5%
7 – 12 months	5%	4%	16%	5%
1 – 2 years	17%	13%	17%	21%
2+ years	55%	49%	29%	44%
Don't know	5%	8%	4%	5%

36:1 -- How long have you been using the transit system in Tempe?

C. Reasons Ride the Bus

Overall, more than half of Tempe bus riders do so because they want to, not because they have to – its convenient (26%), saves money (9%), they can avoid driving in traffic and parking (7%), it protects the environment (3%), saves wear and tear on their car (3%) and simply provides a way to get around the Valley to any one of several destinations (8%). **Conversely, approximately one third (36%) of Tempe residents do so because they do NOT have other choices** – they do not have a car (36%), a vehicle is not available or is having problems (5%) or they don't have a drivers license (1%).

Table 15: Reasons Ride the Bus
(Among those who have ridden in the past year)

Responses	2004 (n=148)	2003 (n=146)	2001 (n=115)	1998 (n=87)
Don't have car	36%	30%	37%	30%
Convenient	26%	20%	44%	21%
Saves money	9%	6%	3%	2%
To avoid driving in traffic/parking	7%	6%	-	-
Vehicle not available/having car problems	5%	8%	-	-
Protects environment	3%	1%	7%	2%
Saves wear on car	3%	2%	2%	1%
A way to get around	3%	5%	-	-
To get/to from work	2%	5%	-	-
To get/to from school	1%	4%	-	-
To get/to from recreational activities	1%	5%	-	-
Dislike driving	1%	-	-	-
To get/to from airport	1%	2%	-	-
Just to ride the bus	1%	3%	-	-
Don't have license	1%	2%	4%	2%
Other	3%	6%	5%	-
Don't know	1%	-	-	-

35:1-- What is the main reason you ride the bus?

D. Travel Patterns

1. Travel Destination

Unlike the three previous waves of this tracking study, this year the top destination of current Tempe bus riders was ASU. About three in ten riders say they go mainly to ASU (31%), a result that is noticeably higher than the 18% reported in 2003. Single riders (39%), as well as those with at least some college education (35%), were generally those who were most likely to indicate their main destination is ASU.

The second most common destination riders listed was work (30%). Historically work has usually been the top destination of Tempe bus riders, especially among riders under the age of 50 (36% currently). Shopping and errands are also common destinations mentioned by bus riders (27% and 11%, respectively). Table 16 on the following page contains a detailed list of all the destinations mentioned by Tempe bus riders.

Bus Rider Destinations

(Among Bus Riders.)

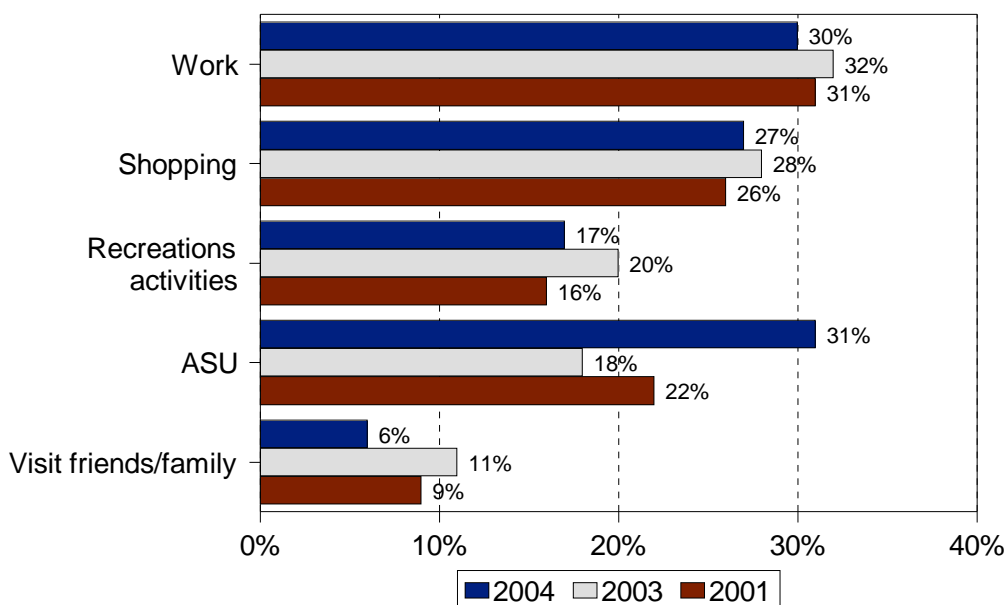


Table 16: Where Bus Riders Go
(Among bus riders)

Responses	2004 (n=148)	2003 (n=146)	2001 (n=115)	1998 (n=87)
ASU	31%	18%	22%	25%
Work	30%	32%	31%	26%
Shopping	27%	28%	26%	24%
Recreational act.	17%	20%	16%	7%
Errands	11%	5%	5%	10%
Visit friends/family	6%	11%	9%	10%
Dr. appointments	6%	6%	4%	6%
Community college	4%	6%	4%	4%
High school	4%	3%	-	-
Downtown Tempe	3%	3%	5%	2%
Airport	3%	3%	-	-
Court	3%	3%	-	-
Downtown Phoenix	2%	1%	6%	-
Library	-	2%	-	-
Downtown (unspecified)	-	5%	-	-
Where need to go	-	1%	5%	1%
Home	-	1%	1%	1%
Other	4%	-	-	-

34:1 -- Where do you go when you ride the bus?

2. *Travel to Arizona Mills*

More than one-third of Tempe bus riders have taken the bus to Arizona Mills Mall (37%). Arizona Mills Mall has grown in its popularity as a common destination for bus riders over the past three years. In 2001, only 23% reported they had ever ridden the bus to Arizona Mills Mall. This year, those most likely to have ridden a bus to the mall include:

- Those between the ages of 35 and 49 (47%).
- Residents earning less than \$40,000 annually (51%).
- Respondents with a high school or less educational background (50%).

Those who have taken the bus to Arizona Mills Mall generally use one of three routes, namely 77/Baseline (19%), the 56 (14%), or the 92 (14%). And overall, a strong majority says the main reason they go to the mall is to shop (78%). However, 9% go to work there.

Table 17: Arizona Mills
(Among bus riders)

	2004 (n=148)	2003 (n=146)	2001 (n=115)
Ride Bus to AZ Mills	37%	32%	23%
Route Taken	(n=55)	(n=46)	(n=26)
77/Baseline	18%	20%	30%
56	14%	30%	27%
92	14%	9%	12%
66	7%	-	-
65	6%	-	-
Red line/University	5%	8%	4%
62/Hardy	3%	6%	4%
McClintock & Southern	2%	4%	-
72	9%	2%	12%
51	-	2%	4%
Other	14%	6%	8%
Don't know/no answer	20%	33%	27%
Reason For Trip			
Shopping	78%	83%	81%
Work	9%	6%	8%
To transfer to another bus route	7%	2%	-
Other	7%	6%	15%

49:1 thru 51:1-- Do you ever ride the bus to Arizona Mills? If YES:
Which route do you use to get there? Why do you go there?

E. Bus Activities

As in the past, the largest proportion of bus riders surveyed say they do nothing other than look out the window while riding the bus (44%). Reading is the second most commonly mentioned activity for bus riders (42% say they do some type of reading – i.e., books, magazine, or newspaper). And, for the first time in this tracking study, talking on one's cell phone was brought up by 3% of the Tempe bus riders.

Table 18: What Bus Riders Do on the Bus

Responses	2004 (n=148)	2003 (n=146)	2001 (n=115)	1998 (n=87)
Nothing/look out window	44%	47%	63%	53%
Read newspaper/ magazine/ book	42%	45%	38%	38%
Talk to other riders	17%	14%	16%	12%
Listen to music	5%	3%	5%	5%
People watch	2%	2%	1%	1%
Work/study	3%	2%	3%	5%
Talk on cell phone	3%	-	-	-
Sleep	1%	1%	-	2%
Talk to driver	-	-	4%	2%

55:1 -- What do you do while riding the bus?

F. Alternate Modes of Travel

As in the past, if there were no transit services in Tempe, many riders would simply drive themselves to their required destinations (43%). Those who are most likely to indicate they would drive themselves were over age 50 (62%), respondents with a college degree (59%), married riders (56%), and those with incomes over \$40,000 (65%). An additional 18% said they would get a ride from someone else. These were generally female riders (26%) and residents with a high school or less educational background (33%).

Making Trips Without Transit

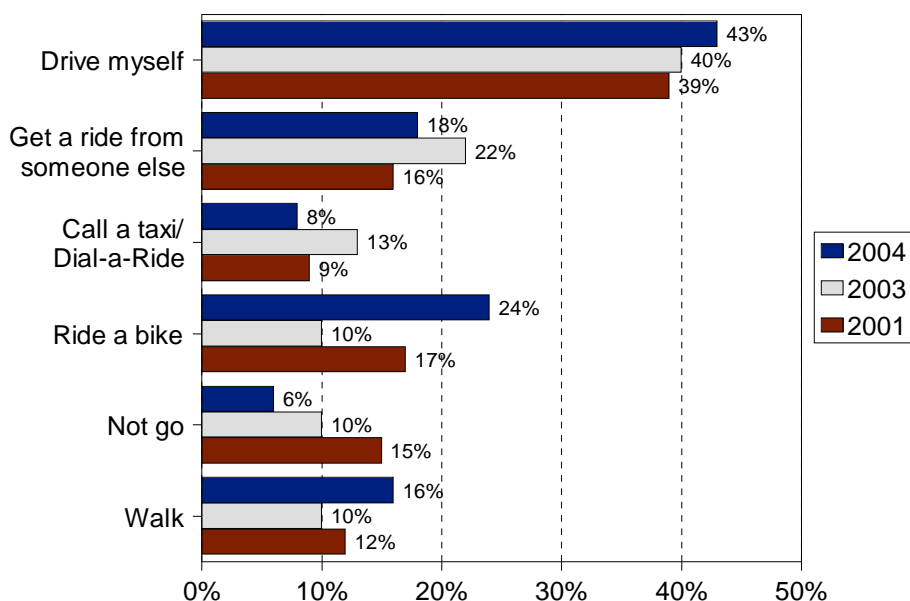


Table 19: Alternate Modes of Travel

Responses	Total 2004 (n=148)	Education		
		HS or less (n=24)	Some college (n=52)	College degree (n=70)
Drive myself	43%	33%	27%	59%
Ride a bike	24%	17%	25%	26%
Get a ride from someone else	18%	33%	21%	10%
Call a taxi/dial-a-ride	8%	8%	12%	4%
Not go	6%	17%	4%	4%
Walk	16%	17%	19%	14%

56:1 -- How would you make the trips that you currently use the bus for if there were not transit service in Tempe?

G. Finding Information about Bus Schedules

The Bus Book remains the main source of information bus riders turn to when in need of information about bus schedules; in fact, use of the Bus Book appears to be growing among Tempe bus riders. Currently more than half of the Tempe bus riders surveyed said they use the Bus Book to look up needed information (54%), while in 2003 about 41% mentioned use of the Bus Book and 37% in 2001.

As mentioned earlier when discussing information sources used by non-riders, the Internet has grown tremendously as a resource for finding out more about the local bus services and schedules. **This year more than one-fourth, or 26%, say they look up bus schedule information online.** Use of the Internet has more than doubled since last year alone (10% 2003), and tripled since 2001 (8%).

Table 20: Bus Schedule Information
(Among bus riders)

Responses	2004 (n=148)	2003 (n=146)	2001 (n=98)
Bus Book	54%	41%	37%
Internet	26%	10%	8%
Call (602) 253-5000	16%	10%	14%
Route maps at bus stops	15%	9%	5%
Library	2%	3%	3%
Friend/Family	1%	7%	8%
Work	-	3%	4%
School	-	3%	2%
Work	-	3%	-
Already know info.	-	2%	-
Bus driver/bus station	-	1%	4%
Newspaper	-	1%	2%
Convenience store/grocery store	-	1%	-
Don't know	5%	-	-

57:1 – How do you get your information about bus schedules?

H. Satisfaction with Bus Service

1. Satisfaction Ratings

Next, bus riders were asked to rate their level of satisfaction with eight different aspects of riding the bus. Respondents rated the categories by using four-point nominal scales (“very satisfied,” “somewhat satisfied,” “not very satisfied,” and “not at all satisfied”). **Overall satisfaction with the Tempe bus system was rated at 91% (40% “very satisfied” + 51% “somewhat satisfied”).** There were no statistical differences demographically in the overall rating of the bus system.

Comfort on the bus received the highest level of satisfaction ratings from Tempe bus riders. A solid 95% of the riders indicated they are at least somewhat satisfied with how comfortable they are on the buses. It should be noted, though, that three other aspects of the bus service rated received higher “very satisfied” levels than did comfort on the bus. The highest of these was driver courtesy and professionalism: 64% of the riders were “very satisfied” with their drivers.

Table 21: Satisfaction with Bus Service
(Among bus riders)

Attributes (n=146)	Net Satisfied*	Very Satisfied	Somewhat Satisfied
Overall Satisfaction with Bus System	91%	40%	51%
Comfort on the bus	95%	53%	42%
Driver courtesy and professionalism	94%	64%	30%
Cleanliness of the bus	93%	60%	32%
Ease of using the bus	93%	53%	39%
Safety on the bus	92%	63%	29%
Ease of reading and understanding the schedule and maps	82%	53%	28%
Reliability/on-time performance of buses	80%	43%	36%
Route frequency	78%	33%	45%

39 through 46: In general how satisfied are you with... *Includes Very Satisfied + Satisfied Ratings.

2. Satisfaction with Resolution of Complaint

Fourteen percent (14%) of riders indicated they had filed a complaint with the City of Tempe about the bus system. Among those who filed (21 riders), four were “very satisfied” with the resolution, three were “somewhat satisfied,” five were “somewhat dissatisfied,” and nine were “not at all satisfied.”

V. Tempe In Motion (TIM)

A. Awareness of Tempe in Motion

Awareness of Tempe in Motion (TIM) among residents was measured at approximately 51% this year, which represents a solid increase over the results reported in 2003 and 2001. Those most likely to be aware of TIM were white collar workers (58%), current bus riders (57%), and those under the age of 35 (59%). Additionally, a higher proportion of Tempe residents were able to identify the meaning of “TIM” as Tempe in Motion (72% vs. 57% in 2003).

Table 22: Awareness of TIM

	2004 (n=405)	2003 (n=415)	2001 (n=404)
Total Awareness (Unaided + Aided)	51%	39%	38%
Unaided Awareness	22%	8%	12%
Aided Awareness	29%	31%	26%
Meaning of TIM	(n=205)	(n=152)	(n=154)
“Tempe in Motion”	72%	57%	55%
Other	2%	1%	9%
Don’t know	27%	43%	36%

*59:1 thru 61:1 -- What is the name of Tempe’s transit/bicycle/pedestrian program?
Have you ever heard of TIM? IF YES: To the best of your knowledge, what does TIM
mean or stand for?*

B. Source of Awareness (Among those Aware)

Residents who were aware of TIM were most likely to indicate they became aware by seeing a street banner (28%). Four other common sources were listed by those aware of TIM, including television (16%), print ads (12%), and signs on buses (12%). These results are comparable to sources mentioned by respondents in both 2003 and 2001.

Table 23: Source of TIM Awareness
(Among those aware)

Responses	2004 (n=205)	2003 (n=152)	2001 (n=154)
Street banner	28%	24%	21%
TV	16%	10%	23%
Print ads	12%	16%	19%
Signs on the buses	12%	16%	18%
Direct mail	5%	9%	6%
Library	3%	3%	-
Word of mouth	3%	4%	3%
Bill inserts	2%	4%	2%
Internet	2%	1%	2%
Signs (general)	1%	3%	-
Cinema/movie slides	1%	2%	1%
Bus book	1%	2%	-
Radio	1%	1%	7%
Mall kiosks	-	1%	3%
Newspaper	-	3%	-
At work	-	-	3%
Other	3%	3%	4%
Don't know	20%	16%	13%

62:1 -- How did you hear about it? (Among those aware)

C. TIM Advertising

1. Awareness and Source of Advertising

Those aware of TIM were next asked if they had seen or heard any advertising for this program. More than half remembered seeing ads (54%). As might be expected, those most likely to be aware of TIM advertising were those who have ridden a bus within the past year (62% vs. 48% of non-riders). Those with at least some college education were also highly likely to be aware of TIM ads (56%).

When asked where they had seen the advertising, television was the most prominent response (50%), followed by street banners (26%), and print ads (16%). A wide variety of other media sources were also listed by respondents, and are detailed in the following table.

Table 24: Source of TIM Advertising Awareness
(Among those aware of TIM)

	2004 (n=205)	2003 (n=152)	2001 (n=154)
Aware of TIM advertising	54%	51%	60%
Source of Advertising	(n=110)	(n=78)	(n=93)
TV	50%	26%	48%
Street banner	26%	26%	15%
Print ads	16%	15%	13%
Signs on buses	8%	17%	-
Bill inserts	4%	1%	-
Direct mail	3%	6%	10%
Radio	3%	4%	8%
Cinema/movie slides	3%	4%	2%
Library	3%	3%	-
Billboard	2%	1%	-
Newspaper	-	3%	-
Signs (general)	-	3%	-
Mall kiosks	-	-	1%
Other	4%	3%	8%
Don't know	4%	12%	6%

63:1 – 64:1 -- Do you remember hearing or seeing any advertisements for TIM? Where did you see the advertising for TIM?

2. Advertising Message

TIM advertising this year took a different approach in expressing new messages to Tempe residents. The ads seem to be communicating more clearly this year; in 2003 the most common message recalled was just “TIM” (15%). **For the first time, those aware of TIM advertising say the message of the TIM ads was that riding a bus or bike is good for the environment (15%).** A second common message was riding bus/bike is convenient or easy (10%).

Table 25: TIM Advertising Message
(Among those aware)

Responses	2004 (n=110)	2003 (n=78)	2001 (n=93)
Riding the bus/bike good for environment	15%	-	-
Riding the bus is convenient/bike easy	10%	-	-
Riding the bus is easy	9%	-	2%
Riding bus saves you money	7%	-	-
Promotion of using alternate modes	6%	9%	11%
Walking is good for your health	3%	-	-
It's cool to ride the bus	3%	3%	-
Going to events/rec. activities	2%	-	-
Remember logo	2%	-	-
Just “TIM”	-	15%	8%
“Tempe in Motion”	-	6%	4%
Benefits of taking the bus	-	5%	13%
New buses that “kneel”/new buses that lower down	-	5%	2%
Extended bus service/hours	-	3%	-
Where to get bus information/scheduling	-	3%	-
Other	7%	5%	8%
Don't know	59%	47%	47%

65:1 -- What messages do you recall?

3. Advertising Effect on Perception of Tempe Bus System

More than half of those aware of the TIM advertising felt it had a positive effect on their perceptions of the bus system in Tempe (53%). Female respondents were significantly more likely than male riders to say the ads for TIM made them think more positively toward the bus system in Tempe (63% vs. 43%, respectively). None of those aware said the ads made them feel more negative towards the bus system. These results are somewhat brighter than those recorded in 2003, but are nearly equal to 2001 figures.

Table 26: Advertising Affect on Perception
(Among those Aware of TIM advertising)

	2004 (n=110)	2003 (n=78)	2001 (n=93)
Make you think more positively about the bus system in Tempe	53%	44%	54%
Have no effect on your perceptions	44%	46%	45%
Make you think negatively about the bus system in Tempe	-	-	-
Don't know	4%	10%	1%

66:1 -- How did the advertising affect your perception of the bus system in Tempe? Did it...

VI. Miscellaneous Issues

A. Advertising New Transit Services

This year more than one-third of the Tempe residents surveyed said new services to the bus system in town should be introduced to residents through direct mail (35%). Non-riders were particularly more likely to suggest this form of communication (38% vs. 30% of riders). So also were women (40%) and those with a high school or less education (53%). Other traditional mass media formats were also frequently referenced. For example, television and newspapers were cited by 29% of the respondents each. Non-riders were equally likely to mention newspapers, but they were more likely than riders to suggest new services be advertised on television (32% vs. 23%, respectively).

Table 27: Introducing New Services in Tempe

	2004 (n=405)	2003* (n=415)	2001* (n=404)	1998* (n=401)	2004 Bus Riders	
					Bus Rider (n=148)	Non Bus Rider (n=254)
Direct mail	35%	25%	34%	24%	30%	38%
Television	29%	23%	41%	32%	23%	32%
Newspaper	29%	17%	33%	26%	29%	29%
Radio	10%	5%	12%	4%	6%	12%
Internet/e-mail	8%	2%	4%	-	10%	6%
Insert in water bill	4%	6%	9%	4%	1%	6%
Bus shelters	4%	2%	2%	-	9%	1%
Information inside of buses	4%	1%	-	-	10%	2%
Utility bills in general	3%	2%	3%	-	3%	3%
Flyer/newsletter	2%	5%	5%	2%	1%	2%
Phone call	2%	1%	-	-	1%	2%
In Bus Book	1%	-	-	-	2%	-
Information on buses	-	-	4%	1%	-	-
At school/library	1%	-	2%	-	2%	1%
Other	2%	2%	5%	6%	3%	1%
Don't know/not sure	6%	9%	4%	1%	5%	7%

67:1 -- If new transit services are going to be introduced, what would be the best way for the City of Tempe to tell you about them?

* In 2003 and in 1998, respondents were allowed to give only ONE answer, but in 2001 they could give multiple responses.

B. Bicycle Usage

Similar to findings from previous years of this tracking study, approximately 57% of the residents surveyed have access to a bike. For those who have a bike, about two-thirds ride it at least once a month (65%). One in four says they ride their bike at least ten times each month (25%). Those most likely to ride their bike at least once a month are male respondents (72%) and those under the age of 35 (76%).

Table 28a: Access to and Frequency of Bike Use

	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Have access to bike	57%	56%	58%	60%
Frequency				
Never/occasionally	32%	36%	33%	35%
Once or twice	21%	18%	13%	16%
Three to five times	12%	14%	17%	14%
Six to ten times	6%	8%	8%	8%
10+ times	25%	21%	27%	26%
Don't know/not sure	3%	3%	2%	2%

68:1 and 69:1- Do you have access to a bicycle that you can ride when you want to? How many times in a month do you ride your bike? (Among those who have a bike to ride.)

Table 28b: Access to and Frequency of Bike Use

	2004 (n=405)	Gender		Age		
		Male (n=200)	Female (n=205)	18-34 (n=125)	35-50 (n=118)	50+ (n=159)
Have access to bike	57%	68%	46%	63%	72%	42%
Frequency						
Never/occasionally	32%	26%	42%	23%	31%	45%
Once or twice	21%	21%	20%	22%	25%	15%
Three to five times	12%	12%	13%	14%	13%	10%
Six to ten times	6%	5%	8%	6%	5%	9%
10+ times	25%	34%	14%	34%	22%	19%
Don't know/not sure	3%	2%	3%	1%	5%	2%

Those who have a bike, but who only ride it occasionally were asked why this was the case (n=75). Lack of time was the most common reason for not riding their bike more often (23%); bike riding takes too long to be considered convenient. An additional 20% said it was usually

too hot to ride their bike, followed by 13% who feel it is too dangerous to ride. Eleven percent (11%) said their bike is not currently working.

It seems most of the time, bicycles are ridden for the purpose of exercise; this has been the case for every wave of this study over the past six years (58%). Non-bus riders (69%), those between the ages of 35 and 49 (66%), and respondents earning over \$40,000 annually (68%) were those most likely to indicate they ride their bike just for exercise. Other frequent biking destinations Tempe residents go to include work or school (29%), the store (22%), parks (4%), and friends' homes (4%).

Table 29: Where Bike Riders Go

Responses	2004 (n=157)	2003 (n=142)	2001 (n=404)	1998 (n=401)
Exercise	58%	59%	64%	56%
Work/school	29%	30%	32%	26%
Store	22%	12%	14%	24%
Park	4%	6%	8%	6%
Friend's house	4%	4%	5%	6%
Run errands	-	2%	-	-
Mill Avenue/ Downtown Tempe	2%	2%	-	-
ASU/Library	2%	1%	1%	4%
South Mountain	-	1%	-	-
Anywhere	-	1%	-	-
Tempe Town Lake	1%	1%	-	-
Bike paths	-	1%	1%	3%
Other	2%	1%	3%	11%
Don't know/not sure	3%	-	2%	1%

70:1-- Where do you go when you ride your bike?

C. Awareness and Potential Usage of Light Rail System

Nearly nine in ten Tempe residents are aware of the planned Light Rail Transit System (87%). Awareness is particularly high among those over age 35 (92%) and those with incomes over \$40,000 annually (95%).

All respondents were asked how likely they felt they would be to use this planned Light Rail Transit System. **Overall, about three in five said they would be likely to try it once it opens in late 2008 (60% very + somewhat likely).** Those most likely to indicate a likelihood to use the Light Rail system were under age 35 (74% very + somewhat likely), current bus riders (74% very + somewhat likely), and college graduates (66% very + somewhat likely).

Table 30: Awareness of and Likelihood to Use Light Rail System

Responses	Total 2004 (n=405)	Age			Income	
		<35 (n=125)	35-49 (n=118)	50+ (n=159)	<\$40k (n=144)	\$40k+ (n=184)
Aware Light Rail System	87%	78%	92%	92%	78%	95%
Likely to Use Light Rail*	60%	74%	64%	46%	65%	61%
Very likely	31%	36%	36%	24%	35%	33%
Somewhat likely	29%	38%	28%	23%	30%	28%
Not very likely	16%	10%	18%	19%	11%	18%
Not at all likely	20%	12%	17%	28%	17%	19%
Don't know	4%	5%	1%	7%	7%	2%

72:1 – Are you aware of the planned Central Phoenix –East valley Light Rail Transit System, which is scheduled to open in late 2008? 73:1 – How likely do you think you will be to use the Light Rail Transit System when it opens?

*Very + Somewhat likely responses