



City of Tempe Transit Survey Report

October 2006

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 1998, January 2001, January 2003, and October 2004. The survey was completed with 409 Tempe residents. The margin of error for this sample size is approximately $\pm 4.9\%$ at a 95% confidence level.

Perceptions of Public Transit

- Tempe residents primarily feel that public transit benefits “everyone” (42%), another group perceived as a beneficiary of public transit includes people without cars (21%), and ASU students (17%). A new group added to this year’s beneficiary list were “conservatives looking to save gas,” although it was listed by only 1% of all residents.
- Non-bus riding Tempe residents continue to cite a strong preference for using their car, with 79% citing this as a reason for not using public transit services. Others expressed the belief that the bus takes too long (59%), or that they need their car for business (46%).

Potential Use of Tempe’s Transit System

- Almost half of the Tempe residents who reported that they have NOT ridden a bus within the past year say they have used a bus in the Valley at some time (46%). Two in five (40%), of those who have NEVER ridden a bus in the Valley indicated they have thought about it.
- Shopping remains the top destination that non-riders most foresee being able to get service to and from by using a bus (selected by 53%).
- The circumstance most likely to encourage non-riders to consider taking the bus is having a car break down (15%). Having a convenient, faster system with more buses and more frequent routes was the second most mentioned circumstance at 10% while others stated that not having a car (9%) would be most likely to influence them. An additional fourteen percent (14%) indicated they would never consider riding the bus.
- A majority of non-riders say all five of the arguments posed to encourage transit usage were at least somewhat effective, but overall “lowers air pollution” and “saves money” were the two most effective reasons posed that would encourage them to consider riding the bus.
- Tempe non-riders continue to cite the Internet as the resource they are most likely to use to find information about local bus services. Since 2001 use of the Internet as resource has almost tripled (from 15% in 2001 to 43% currently).

Rider Characteristics and Opinions

- The percentage of Tempe residents reporting to have ridden a bus in Tempe in the past year has dropped to 29% after a previous record high of 36% reported in both 2003 and 2004.
- Those most likely to be frequent riders (having ridden 20 or more times in the past year) continues to be those under the age of 35 (23%), with a high school education (23%) and an annual income under \$40,000 per year (20%). As found in previous studies, male residents were more likely than female residents to have ridden the bus within the past year (34% compared to 25%).
- The percentage of riders who have been riding the bus for two or more years has remained steady making up just over half of all bus riders (54% currently).
- Overall, roughly two in five riders (42%) take the bus because they do not have another choice. “Not having a car” continues to be the top reason (29%), while other reasons include not having a vehicle available due to car problems or scheduling issues (9%), not driving (3%), or not having a driver’s license (1%).
- Almost one in eight bus riders (11%) indicate they are now riding the bus in order to avoid difficulties associated with driving or riding their bike, examples being - avoid parking (4%), location not accessible by bike (3%), avoid traffic (2%), and getting to airport (2%).
- The most marked change in 2006 deals with the dramatic drop in the number of riders reporting ASU as a destination (14% compared to a previous high of 31% in 2004).
- When asked about top destinations, work continues to be number one for bus riders, up significantly to a high of 39% this year, while more than one in four riders (27%), cited shopping as their destination. Recreational activities rounded out the top three destinations at 15%.
- Approximately one in four Tempe bus riders have taken a bus to Arizona Mills Mall (26%), down from high of 37% in 2004. This is the first year that the mall has experienced a drop as a destination after exponential growth.
- Almost two out of three riders who go to Arizona Mills Mall go there to shop (66%), while a growing number (17% compared to only 7% in 2004) are going there to transfer to another bus route. An additional 13% go there to work.
- The Bus Book continues to be the main source of information that riders turn to when in need of information about bus schedules, (49%, down slightly from 54% in 2004). This year, more than one third of riders surveyed used the Internet to look up bus schedule information online. The Internet continues to grow as a resource for bus riders (35%, up from 26% in 2004).

- The vast majority of bus riders indicated overall satisfaction with the Tempe bus system (80%; 45% “very satisfied” + 35% “somewhat satisfied”). While this reflects a drop from 2004’s overall rating of 91%, it should be noted that this year’s “very satisfied” rating is actually up from 40% in 2004 to 45% this year.
- Cleanliness and ease of using the bus received the highest satisfaction ratings from Tempe bus riders (83% and 82% respectively), while safety rounded out the top three at 80%. Overall, however, ratings for bus attributes were down across the board in comparison to 2004.
- Three out of four bus riders offered advice to potential riders that was of a positive nature. Approximately three out of seven riders (42%) indicated they would tell potential riders to “give it a try,” which is consistent with past years. Other positive advice included the sentiments that the bus provides good service 8%, saves gas money because is cheaper than driving 7%, and is good for the environment (6%). Approximately one six (17%) gave comments that could be construed as negative.

Tempe in Motion

- Awareness of Tempe in Motion (TIM) among residents was measured at approximately 38% this year; significantly lower than 2004’s 51% rating, but within the range of what we have seen in previous year’s studies. In addition, 67% of residents were able to correctly identify the meaning of “TIM” as Tempe in Motion.
- Residents who were aware of TIM were most likely to say they became aware through signs on the bus (20%). Other top sources included television and street banners (both mentioned by 19%).
- For those aware of TIM advertising, when asked where they had seen the advertising, television was the most prominent response (56%). Approximately one third (34%), recalled hearing a message that promoted a specific benefit of riding the bus, 11% recalled seeing the general name, “TIM” or the TIM logo being promoted.
- More than half (52%) of those aware of TIM advertising indicated it had a positive effect on their perceptions of the bus system in Tempe.

Miscellaneous Issues

- The number of residents surveyed who report access to a bicycle dropped slightly this year to 53% from 57% in 2004. For those who have a bike, riding patterns mirror past years with approximately half stating that they ride at least once a month (51%).
- For more than one in four residents, the Arizona heat was the most common reason given for not riding their bike more often (28%), with an additional 24% stating they were simply too old or were not physically able to due to a health condition or injury (listed by 12% each).

- As found in previous studies, more bicycles are reportedly ridden for exercise (59%) than for any other reason.
- Approximately one of four Tempe residents surveyed (25%), report being aware of the city's Neighborhood Circulator Bus program. Once informed of the service, an encouraging 82% of residents stated they would support the program in their own neighborhood.
- For those indicating they are not likely to use the circulator bus, the dominant response is a stated preference to drive because they like their car (38%).
- Thirty-two percent (32%) of households with children six years of age or older, stated that their children ride a city bus.
- Among those surveyed who have children six years of age or older, 35% indicated they had heard of the Tempe Youth Free Bus Pass.
- Word of mouth was the most cited source of information for parents whom were familiar with the Tempe Youth Bus Pass program (27%), while schools and the library both warranted frequent mentions (21% and 12% respectively).

Conclusions

1. Bus ridership decreased after holding steady in the previous two years of the study. However, usage overall continues to be higher than in the Valley as a whole and the percent of riders who have been using transit for one to two years has increased while the percent of those using the system for two or more years has held steady. The decline in ridership came among new riders.
2. As in the past, more bus riders in Tempe use transit for convenience than bus riders across the Valley in general. More bus riders than ever before reported using transit to get to work, however, significantly fewer riders also reported using the bus to get to ASU. A possible explanation is that since 2004 a bus pass program for ASU staff and students has been introduced, with a high percentage of ASU staff taking advantage of the program. It is possible that the "work" mentions by bus riders may actually be trips to work at ASU. This decline in ASU trips also may be at least partially a result of the difficulty experienced in reaching younger residents, particularly students, to complete the survey this year.
3. It appears that current bus riders continue to be satisfied with the system overall, however, satisfaction has declined. It is highly likely that the increased construction in and around downtown Tempe has affected the ability and desire of residents to use transit to get to ASU or downtown in general as well as the efficiency of bus system. It is also possible that the construction and the perceived difficulty of getting around town are reducing the number of people willing to use transit around the university.

4. As in previous studies, the use of the Internet for information about the transit system continues to grow among both riders and non-riders.
5. Using transit to save money and to help lower air pollution continue to be the top two messages that resonate with non-riders. However, most non-riders continue to indicate that the only reason they would consider using the bus would be if their car would become unavailable for some reason. The perceived added inconvenience of the construction in Tempe may cause the interest in bus ridership to stay down until the ability to easily navigate through Tempe improves significantly.
6. Awareness of TIM declined significantly after climbing to an all-time high in 2004 and returned to levels recorded in 2001 and 2003. This may be due, at least in part, to a shift in messaging for TIM in the past year. Because of street restrictions and closures due to construction in and around Tempe, the advertising has been focused on construction-related messages and bus detours as opposed to prior messaging that encouraged transit usage. Residents may not be connecting those messages with TIM.

However, the percentage of those aware who were able to tell the meaning of the acronym declined only slightly and interestingly the awareness of advertising for TIM among this group actually increased slightly compared to 2003 and 2004. Also, in 2004 there had been a notable decline in the percent of non-riders aware of bus service that would get them to various destinations from the previous year. In 2006, the awareness of bus service for shopping, school and work trips rebounded slightly. Apparently, not as many residents are seeing references to TIM, but those who are more likely to be processing its messages than in the past.

7. Although only one fourth of Tempe residents indicated awareness of the neighborhood circulator bus program, the vast majority indicated they would support a program in their neighborhood and slightly more than half indicated they were at least somewhat likely to use a neighborhood circulator. The rule of thumb for “likelihood to use” questions is that approximately one-half of those who indicated they are “very” likely to use something most accurately represents the percent of the population who will make good on that action. In this case, that means slightly more than one in ten residents (11%) are truly likely to use a neighborhood circulator in their area.

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 1998, January 2001, January 2003, and October 2004.

Random calls of Tempe residents were made from WestGroup's interviewing center in Phoenix, Arizona during the month of September 2006. 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.

After data collection was completed it was noted that the RDD sample skewed notably older than the samples achieved in the previous four studies conducted on this topic for the City of Tempe. The decision was made to weight the data to more comparably reflect previous studies – residents ages 18 to 34 – 30%; ages 35 to 54 – 25%; ages 55+ 45%. There are several possible explanations for this skew toward older residents: a) there has been a shift in the population of Tempe residents with families moving out of central Tempe to other East Valley cities looking for more affordable housing and higher performing schools; b) lower income housing is being replaced with high-end condos and town homes; c) the data collection occurred in early September near the start of the ASU school year and it is possible the student population was not completely set up with phone service as it has been in the past when the study was conducted in October or January; and d) more and more young adults are using cell phones only and not activating land-lines for telephone service. Research companies are not allowed to call cell phone numbers for research purposes.

The survey was completed with 409 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

	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Gender					
Male	51%	49%	50%	50%	50%
Female	49%	51%	50%	50%	50%
Years Lived in Tempe					
<1 year	7%	8%	8%	10%	8%
1 – 2 years	10%	14%	11%	13%	12%
3 – 5 years	16%	12%	16%	15%	20%
6 – 10 years	15%	14%	18%	14%	17%
11 – 20 years	17%	18%	16%	13%	16%
20+ years	35%	34%	30%	34%	26%
Age					
18 – 34	30%	31%	31%	34%	33%
35 – 49	25%	29%	29%	25%	32%
50+	45%	39%	36%	40%	35%
Average Age	50.3	45.8	44.2	44.9	44.7
Education					
Some high school	5%	2%	3%	3%	4%
High school graduate	14%	12%	12%	12%	13%
Some college	33%	34%	26%	40%	36%
College graduate	30%	26%	29%	26%	27%
Post graduate	18%	23%	27%	19%	18%
No answer/Refused	2%	2%	4%	1%	2%
Income					
<\$20,000	12%	15%	12%	15%	12%
\$20 - \$40,000	20%	20%	19%	21%	29%
\$40 - \$60,000	17%	17%	18%	18%	19%
\$60 - \$80,000	11%	12%	14%	10%	12%
\$80 - \$100,000	9%	5%	5%	7%	6%
\$100,000+	15%	10%	13%	10%	8%
Average Income	\$51,500	\$53,700	\$57,700	\$53,500	\$48,600

* 2006 data weighted

As in past studies, just over half of the respondents indicated they are currently married (53%), with 34% reporting children in the household. Of those with children age six or older, 32% indicate their children ride the city bus. A strong majority continue to report access to the Internet from their home (80%), down slightly from last year's 83%. Of those interviewed, three out four indicated they were either employed full time (45%) or are retired (27%).

Table B: Demographics

	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Marital Status					
Married	53%	53%	47%	48%	50%
Single	44%	44%	48%	52%	47%
Children in HH	34%	na	na	na	na
Internet Access	80%	83%	83%	78%	na
Occupation					
Full-time	45%	-	-	-	-
Part-time	10%	-	-	-	-
Retired	27%	-	-	-	-
Student	4%	-	-	-	-
Housewife/ Househusband	5%	-	-	-	-
Unemployed/disabled	7%	-	-	-	-
Refused	3%	-	-	-	-
Zip Code					
85281	25%	-	-	-	-
85282	43%	-	-	-	-
85283	24%	-	-	-	-
85284	9%	-	-	-	-

* 2006 data weighted

II. Perceptions of Public Transit

A. Who Benefits from Public Transit Services

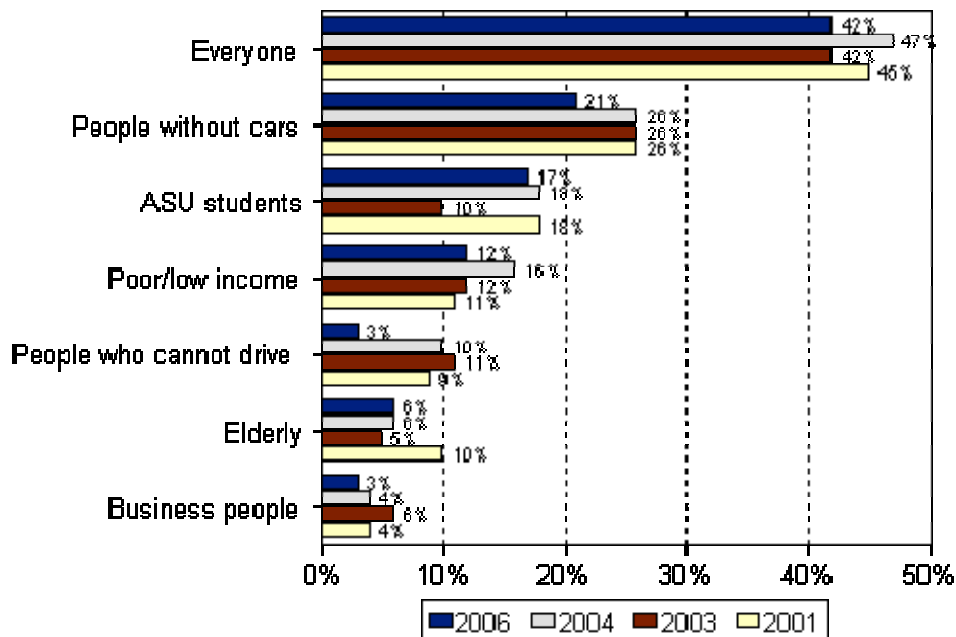
Continuing the trend from past years, Tempe residents primarily feel that public transit benefits “everyone” (42%). This is down from last year’s high of 47%, but is in line with previous year’s findings. Again, as expected, those who have ridden the bus in the last year were significantly more likely to say public transit benefits everyone (52%), as were residents between the ages of 35 to 49 (52% compared to 36% for those younger and 40% for those older), and those who have graduated college (53%, compared to 34% with a high school education and 33% with some college).

People without cars were also highly likely to be perceived as a group who benefits from public transit (21%), as were ASU students (17%), poor/low income residents (12%) and people who cannot drive (3%) – although all experienced decreases from 2004’s previous highs.

Those who indicated that people without cars benefited were most often residents under the age of 35 (30% compared to 12% for those 35-49 and 20% for those over age 55), while those who viewed poor/low income residents as beneficiaries were more likely to be male (17% versus 7% of women) and to have at least some college education or to have graduated college (14% compared to 5% with only a high school education).

A new group added to this year’s beneficiary list were “conservatives looking to save gas,” although it was listed by only 1% of all residents.

Perceived Beneficiaries of Public Transit



2006 n=407 *weighted data

Table 1: Those Who Benefit from Tempe Public Transit

Those who benefit	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Everyone	42%	47%	42%	45%	43%
People without cars	20%	26%	26%	26%	31%
Students at ASU	16%	18%	10%	18%	15%
Poor/low income people	12%	16%	12%	11%	14%
Elderly	7%	6%	5%	10%	8%
People who use it	5%	-	-	-	-
Young people	4%	5%	3%	7%	4%
People who can't drive	3%	10%	11%	9%	7%
Business people	3%	4%	6%	4%	5%
People with disabilities	2%	4%	-	1%	-
Working class	1%	2%	1%	2%	2%
Environment	-	1%	2%	2%	-
Conservatives looking to save gas	1%	-	-	-	-
Tempe residents/taxpayers	1%	-	1%	1%	3%
Other **	6%	3%	5%	5%	18%
No one benefits	2%	1%	3%	1%	2%

Q4: In your opinion, who benefits from having public transit in Tempe?

* 2006 data weighted

**Other indicates less than 1% consensus

B. 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 residents 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's results support that trend**, if to a lesser degree than in 2004 (79% compared to 86%). Those between the ages of 35 and 49 were significantly less likely to agree with this statement than their younger and older counterparts (62% compared to 87% of those younger and 83% for those older).

In addition, more than half of Tempe residents who have not ridden the bus in the last year cited that the bus takes too long (59%), with those under the age of 35 significantly referencing this (78% compared to 52% for those older). As in years past, needing a car for business (46%) rounds out the top three responses for this question as it has throughout the five years of this tracking study.

"Don't know how to use the bus" has increased its ranking as a reason that Tempe residents do not ride the bus, although it's overall agreement level has remained somewhat consistent with 2004's findings (33% compared to 34%). Those most likely to agree with this statement are those with only a high school education (46% compared to 31% who have at least some college).

Table 2a: Reasons for Not Riding Bus
(Among those who have not ridden a bus in the past year)

% Agree	2006* (n=289)	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)
Prefer car	79%	86%	86%	81%	80%
Takes too long	59%	63%	67%	56%	59%
Need car for business	46%	59%	57%	50%	52%
Don't know how to use bus	33%	34%	41%	35%	32%
Not frequent enough	33%	34%	43%	35%	54%
Bus stop far away	24%	25%	26%	30%	32%
Bus stops not safe	23%	19%	24%	20%	-
Buses are dirty	12%	10%	11%	7%	12%
Buses not safe	10%	8%	7%	8%	11%
Don't like people on bus	8%	11%	10%	7%	8%

Q8: 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.

*2006 data weighted

Table 2b: Reasons for Not Riding Bus - Demographic Breakdown
(Among those who have not ridden a bus in the past year)

% Agree	Total 2004 (n=257)	Total 2006* (n=289)	Education			Age		
			HS or Less (n=43)	Some College (n=94)	College Grad (n=146)	18-34 (n=72)	35-49 (n=68)	50+ (n=144)
Prefer car	86%	79%	78%	81%	78%	87%	62%	83%
Takes too long	63%	59%	51%	62%	59%	78%	56%	51%
Need car for business	59%	46%	41%	46%	48%	46%	59%	41%
Don't know how to use bus	34%	33%	46%	37%	27%	33%	28%	35%
Not frequent enough	34%	33%	21%	32%	36%	35%	41%	28%
Bus stop far away	25%	24%	13%	19%	30%	17%	22%	28%
Bus stops not safe	19%	23%	28%	30%	17%	33%	18%	20%
Buses are dirty	10%	12%	11%	17%	9%	26%	7%	8%
Buses not safe	8%	10%	6%	12%	10%	17%	12%	6%
Don't like people on bus	11%	8%	14%	9%	7%	9%	16%	4%

Bold indicates statistical significance at the 95% confidence level under the Education & Age categories.

* 2006 data weighted

III. Potential Use of Tempe's Transit System

A. Past Ridership and Consideration of Riding

Almost half of the Tempe residents who reported that they have NOT ridden a bus within the past year say they have used a bus in the Valley some time in the past (46%). This continues the trend we have seen since tracking this information, where slight increases have been measured every year (37% in 2003, 42% in 2004 and 46% in 2006).

Those who have NEVER ridden a bus in the Valley were asked if they ever thought about using the bus system. About 40% said they have thought about riding the bus, a result that continues to be relatively steady over the life of this study.

Table 3: Use of Buses in Valley

	2006* (n=289)	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)
Have ridden in Valley	46%	42%	37%	41%	38%
	(n=155)	(n=148)	(n=160)	(n=170)	(n=189)
Have thought about riding	40%	40%	42%	38%	37%

Q6-7: 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.)

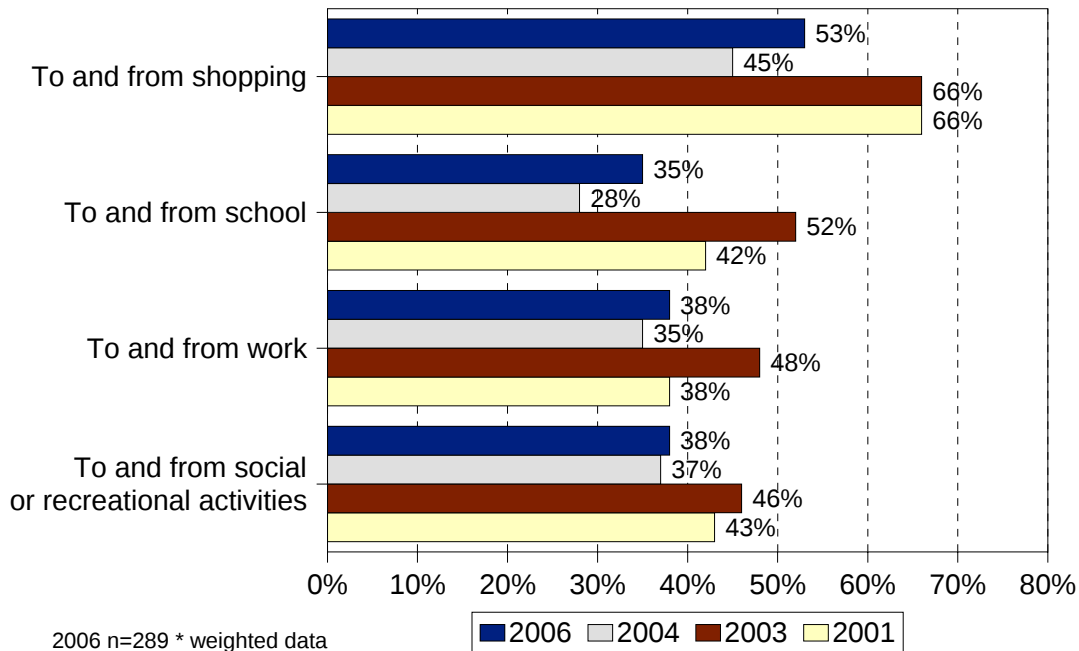
*2006 data weighted

B. Awareness of Bus Services

Compared to 2004, Tempe residents who have not ridden the bus in the past year appear to be slightly more optimistic that the bus service can help them reach common destinations, but are still less positive than in previous years. Shopping remains the top destination that non-riders most foresee being able to get service to and from using a bus.

Aware of Bus Service Destinations

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



As demonstrated in Table 4, **non-riders with a high school education or some college, and those under the age of 35 were most likely to think that the local bus service had the capability to get them to and from common destinations, and most specifically to work.**

Shopping, while perceived as a top destination overall (53%) was primarily viewed this way by those 35 to 49 years old, (63%, compared to 59% for those younger and 45% for those older). Unsurprisingly, the ability to get to school was viewed most positively by those under the age of 35 (52% compared to 29% for those older).

Conversely, those over the age of 50 had a lower opinion of the current bus system's capabilities, were less likely to indicate that they felt the bus could get them to and from common destinations. For example, only one in four (25%) said they thought the bus could get them from social or recreational activities, less than one third (29%) indicated confidence in getting to and from work, while less than half (45%) expressed confidence in being able to get to and from shopping.

Table 4: Awareness of Bus Services

Percent Responding Yes	2004 (n=257)	2006* (n=289)	Education			Age		
			HS or less (n=43)	Some College (n=94)	College Grad+ (n=146)	18-34 (n=72)	35-49 (n=68)	50+ (n=144)
To and from shopping	45%	53%	60%	56%	49%	59%	63%	45%
To and from work	35%	38%	51%	43%	30%	61%	29%	29%
To and from social and recreational activities	37%	36%	42%	36%	32%	54%	50%	25%
To and from school	28%	35%	43%	37%	30%	52%	35%	26%

Q10: From what you know, do you think there currently is local bus service that you could take to get...? (Among non-riders)

* 2006 data weighted

Bold denotes statistical significance at the 95% confidence level under the Education & Age categories.

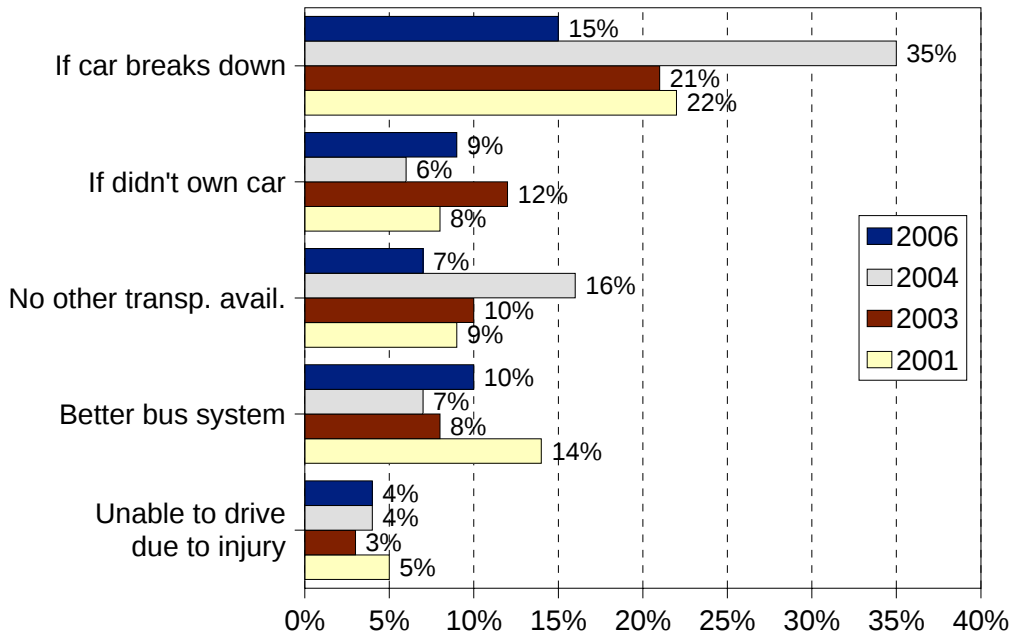
C. Circumstances for Taking the Bus

Non-riders were asked to give specific circumstances that would make them reconsider taking the bus. As in previous years, **having a car break down is the most commonly mentioned circumstance that might get people to use the bus.** However, this year there was a substantial drop in the percent citing this as a reason (35% in 2004 to 15% in 2006) that seems to primarily be attributed to a decrease in mentions from women (42% in 2004 versus 19% in 2006) and those under the age of 35 (51% in 2004 compared to 22% in 2006) citing this as a capitulating circumstance.

Having a convenient, faster system with more buses and more frequent routes was the second most mentioned circumstance (10%), which resonated strongly with college graduates (16% compared to 4% for those without a degree). Not owning a car was mentioned by 9%, while a previous forerunner – “no other transportation available” dropped from 16% in 2004 to 7% in 2006. Again, those most likely to mention not having other transportation were those under the age of 35 (13% compared to 5% for those over the age of 35).

Circumstances that would Cause Residents to Consider Riding the Bus

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



Of those who mentioned they would never consider riding the bus, a significant number were over the age of 50% (23% compared to 6% for those younger than 50) and female (19% compared to 9%).

Table 5: When Residents Would Consider Taking the Bus
(Among those who have not ridden a bus in the past year)

Situation	2006* (n=289)	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998** (n=401)
If car breaks down	15%	35%	21%	22%	14%
Convenience/faster	10%	8%	4%	-	2%
If didn't own car	9%	6%	12%	8%	9%
No other transp. available	7%	16%	10%	9%	10%
Direct routes/no transfers	6%	-	4%	-	-
Unable to drive due- illness or injury	4%	4%	3%	5%	-
Closer bus stops/less walking	4%	-	-	-	-
Different job/work circumstances	3%	4%	1%	3%	-
Emergency	3%	-	-	-	-
If bus ran 24 hours/weekends	3%	-	-	2%	1%
Bus stops- more comfortable/shade	2%	-	-	-	-
Event with parking problems	2%	6%	3%	4%	3%
Better explanation of bus system	2%	-	1%	2%	2%
Going to downtown Phoenix	2%	-	1%	1%	-
To go shopping	2%	1%	2%	2%	2%
Too broke for gas/gas prices going up	2%	-	-	-	-
Day off/ recreation	2%	-	-	-	-
Safer (buses, bus stops)	1%	-	-	-	-
If forced to	1%	-	-	1%	2%
If cheaper	1%	1%	1%	1%	-
If cleaner	1%	-	-	-	-
Other **	12%	8%	18%	15%	19%
None/Wouldn't ride bus	14%	15%	11%	13%	12%
Don't know/not sure	6%	5%	6%	5%	1%

Q11: Under what circumstances do you think you would consider taking the bus?

* 2006 data weighted

**Asked of all respondents in 1998

*** Indicates less than 1% consensus

D. Effectiveness of Persuasive Arguments

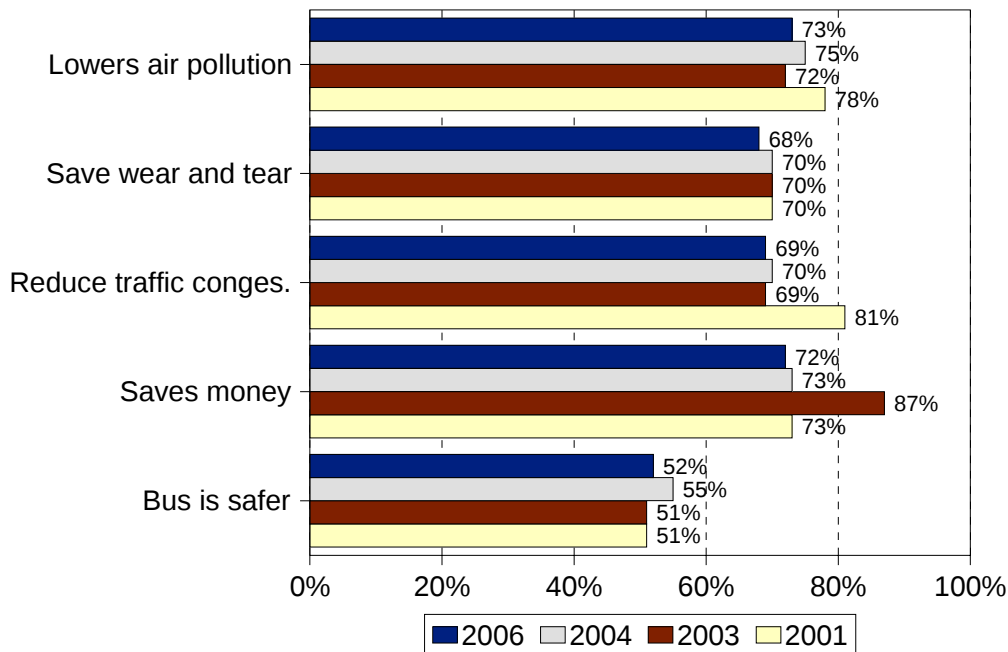
1. Agreement with Aided Arguments

Residents were asked to rate the effectiveness of five arguments for motivating public transit usage. 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, but “lowers air pollution” and “saves money” were the two most persuasive reasons (73% and 72% agreeing, respectively). While both arguments registered somewhat lower support than in 2004, interchangeably they have continued to be the two arguments residents most identify with.

Persuasive Arguments

Very + Somewhat Effective



As previously mentioned, 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 2006, non-riders ages 35 to 50 were more likely than other residents to find four out of five of these arguments effective (75% rating them "very + somewhat" effective), and were most likely to indicate that "lowers air pollution" is the most compelling argument (84% compared to 72% for younger and 69% for those older).**

As in previous studies, younger respondents were more likely to believe that riding the bus saves money (78% versus 71% of those older than 50).

Table 6: Effectiveness of Reasons to Persuade Transit Usage

	2006* (n=289)	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)	2006 Age		
						18-34 (n=72)	35-50 (n=68)	50+ (n=144)
Save money								
Effective	72%	73%	67%	73%	71%	78%	75%	69%
Not effective	24%	25%	29%	23%	28%	20%	19%	27%
Lower air pollution								
Effective**	72%	75%	72%	78%	76%	72%	84%	69%
Not effective***	23%	23%	25%	17%	21%	24%	15%	25%
Less traffic congest.								
Effective	69%	70%	69%	81%	79%	67%	77%	68%
Not effective	28%	27%	28%	16%	18%	26%	22%	28%
Save wear/tear								
Effective	67%	70%	70%	70%	77%	67%	77%	64%
Not effective	29%	28%	25%	27%	21%	30%	22%	31%
Bus is safer								
Effective	53%	55%	51%	55%	55%	52%	53%	53%
Not effective	40%	40%	42%	37%	40%	39%	41%	38%

Q9: 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?

* 2006 data weighted

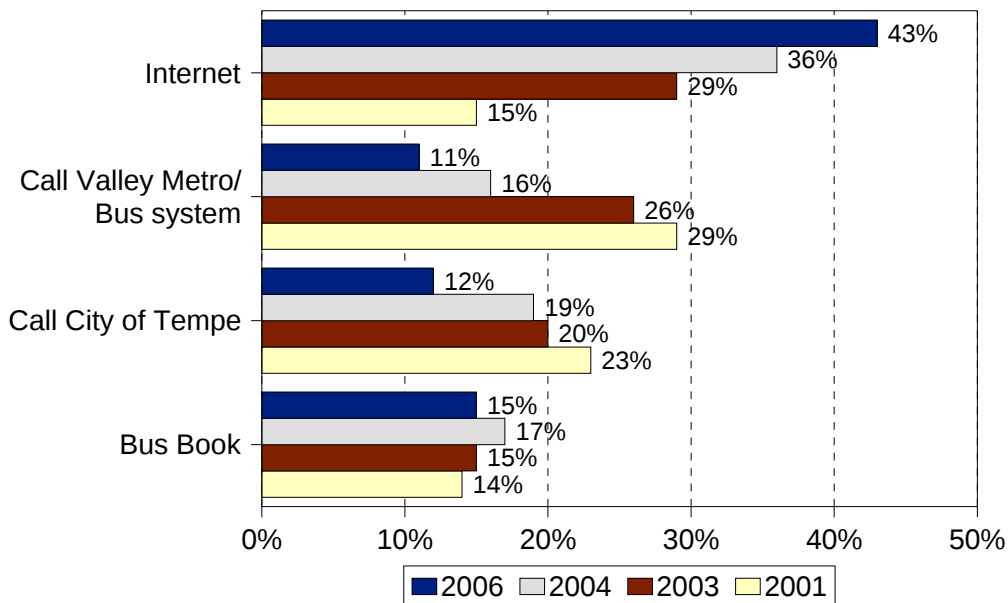
** Very + Somewhat effective *** Not very + Not at all effective

E. Finding Information

As seen in previous years, Tempe non-riders continue to cite the Internet as the resource they are most likely to use to find information about local bus services. Since 2001 use of the Internet as a resource has almost tripled (from 15% in 2001 to 43% currently). As this trend continues it appears to be at the expense of all other resources, most notably calling Valley Metro or the City of Tempe directly. References to the Bus Book continue to hold steady (15%), down slightly from 2004, but staying within the parameters measured during the last five years.

Bus Service Information Sources

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



2006 n=289 * weighted data

Table 7a: Finding Information about Bus Services
(Among those who have not ridden a bus in the past year)

Responses	2006* (n=289)	2004 (n=257)	2003 (n=255)	2001 (n=289)	1998 (n=314)
Internet	43%	36%	29%	15%	2%
Look for a Bus Book	15%	17%	15%	14%	17%
Call Valley Metro/bus system	11%	16%	26%	29%	38%
Call City of Tempe	12%	19%	20%	23%	26%
Public Library	6%	6%	7%	6%	5%
Schedules at bus stops	5%	1%	2%	5%	-
Ask a friend/family member	4%	6%	2%	2%	2%
Yellow pages	3%	2%	5%	5%	7%
City Hall	1%	-	-	-	-
Senior Center	1%	1%	-	-	-
Bus Driver/Get on bus	1%	-	2%	1%	2%
Newspaper	1%	-	-	-	-
Get on the bus	1%	-	-	-	-
Other**	4%	3%	5%	3%	7%
Don't know	12%	-	8%	8%	-

* 2006 data weighted

**Other indicates less than 1% consensus.

Table 7b on the following page shows those most likely to use the Internet as a resource for bus and transit information continues to be those under the age of 50 (59% compared to 27% for those over 50) and with at least some college education (48% compared to 15% without). While those most likely to call Valley Metro or the City of Tempe for bus information are those over the age 50 (18% and 19% respectively). Current information suggests that Bus Book users tend to be younger (22% for those under 35 versus 13% for those older), and single (20% compared to 12% who are married).

Table 7b: Finding Information about Bus Services
(Among those who have not ridden a bus in the past year)

Responses	*2006 Age			*2006 Education		
	18-34 (n=72)	35-50 (n=68)	50+ (n=144)	HS or less (n=43)	Some college (n=94)	College Grad + (n=146)
Internet	65%	53%	27%	15%	48%	48%
Look for a Bus Book	22%	15%	12%	16%	12%	17%
Call Valley Metro/bus system	-	4%	19%	18%	14%	11%
Call City of Tempe	4%	7%	18%	7%	10%	15%
Public Library	-	7%	9%	2%	8%	7%
Yellow pages	2%	4%	2%	2%	4%	2%
Schedules at bus stops	2%	6%	7%	8%	6%	4%
Ask a friend/family	2%	2%	7%	9%	3%	4%
Yellow pages	2%	4%	2%	2%	4%	2%
City Hall	-	-	2%	-	1%	2%
Senior Center	-	-	2%	-	1%	2%
Bus Driver/Get on Bus	-	2%	1%	2%	-	1%
Don't know	11%	7%	14%	16%	11%	10%

Q12: If you were interested in riding a bus in Tempe, how would you go about getting information about the system?

Bold denotes statistical significance at the 95% level.

* 2006 data weighted

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 has dropped to 29% after a previous record high of 36% reported in both 2003 and 2004.

Ridership at all frequency levels seems to have slipped slightly with the exception of the 11 to 20 times per month rider segment which remain steady at 3%.

As shown in Table 8b, those most likely to have ridden the bus 20 or more times in the past year continues to be those under the age of 35 (23%), residents with a high school education (23%) and those with an annual income under \$40,000 per year (20%). As found in previous studies, male residents are more likely than female residents to have ridden the bus within the past year (34% compared to 25%).

Table 8a: Frequency of Riding Bus in Tempe Past Year

#Times	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
1 – 5 times	12%	16%	18%	18%	13%
6 – 10 times	2%	5%	5%	3%	2%
11 – 20 times	3%	2%	3%	1%	2%
20+ times	12%	14%	10%	7%	5%
NET RODE	29%	36%	36%	29%	22%
None	70%	63%	61%	72%	78%

**Table 8b: Frequency of Riding Bus in Tempe-2006
Demographic Breakdown**

	Gender		Age			Income	
	Male (n=206)	Female (n=201)	18-34 (n=122)	35-50 (n=98)	50+ (n=182)	<\$40K (n=128)	\$40K+ (n=205)
1 – 5 times	13%	12%	12%	15%	11%	8%	13%
6 – 10 times	1%	3%	1%	3%	2%	4%	1%
11 – 20 times	3%	3%	5%	2%	2%	5%	2%
20+ times	16%	8%	23%	10%	6%	20%	7%
NET RODE	33%	26%	41%	30%	21%	37%	23%
None	66%	75%	56%	69%	79%	63%	78%
Don't know	2%	-	3%	-	-	2%	-

Q5: How many times have you ridden on a bus in Tempe in the past year?

Bold denotes statistical significance at the 95% level.

*2006 data weighted

B. Length of Use of Transit System

The percentage of riders who have been riding the bus for two or more years has remained steady, making up just over half of all bus riders (54% currently). At the same time, the percentage of riders who have been using the system for one to two years is up to 27%, topping the previous high of 21% found in 1998 and last year's finding of 17%. In comparison, the proportion of those who have been using the bus for less than one year (17%) is somewhat lower than the figures reported in 2004 (23%) and significantly lower than in years previous to 2004 (30%, 50% and 32% respectively).

Findings indicate rider retention is consistent and even building with riders who have been using the system for at least one to two years, while recruitment of new riders is becoming more challenging.

Table 9: Length of Use of Transit System
(Among those who have ridden in the past year)

Time Riding	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=115)	1998 (n=87)
Less than a year	17%	23%	30%	50%	32%
1 – 2 years	27%	17%	13%	17%	21%
2 – 4 years	20%	55%*	49%*	29%*	44%*
4 - 6 years	13%	-	-	-	-
6 years +	21%	-	-	-	-
Don't know	4%	5%	8%	4%	5%

Q13: *How long have you been using the transit system in Tempe?*

*2006 data weighted, prior to 2006 this question only specified more than 2 years.

C. Reasons Ride the Bus

Overall, roughly two in five riders (42%), take the bus because they do not have another choice –“not having a car” continues to be the top reason, but is down significantly (29% compared to 36% in 2004). Other reasons include not having a vehicle available due to car problems or scheduling issues (9%), not driving (3%), or not having a driver’s license (1%).

As in past years, a significant number of riders (36%) take the bus out of choice. Convenience continues to be a top reason (14%), but has dropped dramatically in comparison to last year (26% in 2004 and from a previous high of 44% in 2001). Protecting the environment (3%) and saving money (8%) also continue to be compelling reasons.

In addition, 2006 data indicates a new trend for people riding the bus in comparison to past years. **Almost one in eight (11%) indicate they are now riding the bus in order to avoid difficulties associated with driving or riding their bike, examples being - avoid parking (4%), location not accessible by bike (3%), avoid traffic (2%), and getting to airport (2%).**

Table 10: Reasons Ride the Bus
(Among those who have ridden in the past year)

Responses	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=115)	1998 (n=87)
Don't have car	29%	36%	30%	37%	30%
Convenient	14%	26%	20%	44%	21%
Vehicle not available/having car problems	9%	5%	8%	-	-
Saves money	8%	9%	6%	3%	2%
Get to/from work	6%	-	-	-	-
Get to/from school	5%	-	-	-	-
To avoid parking	4%	7%	6%	-	-
Protects environment	3%	3%	1%	7%	2%
Don't drive	3%	-	-	-	-
Can't ride bike	3%	-	-	-	-
Get around (general)	3%	-	-	-	-
To avoid traffic	2%	-	-	-	-
Get to/from airport	2%	-	-	-	-
Get to/from recreation	2%	-	-	-	-
Don't have license	1%	1%	2%	4%	2%
Dislike driving/take a break	1%	-	-	-	-
Take children for ride	1%	-	-	-	-
Other	8%	3%	6%	5%	-
Don't know	1%	1%	-	-	-

Q14: What is the main reason you ride the bus?

*2006 data weighted

D. Travel Patterns

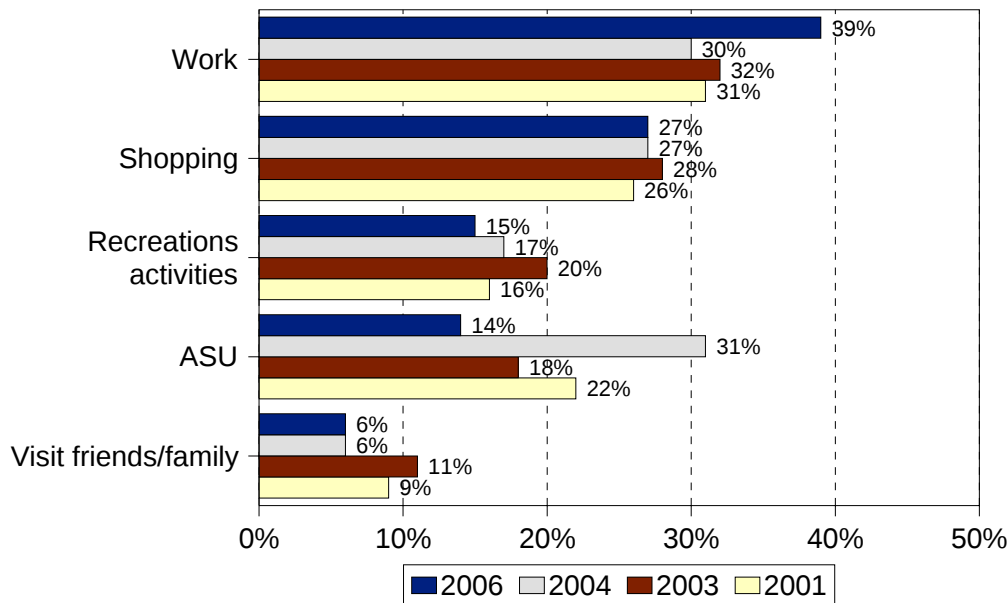
1. Travel Destination

The most marked change in 2006 deals with the dramatic drop in the number of riders reporting ASU as a destination (14% compared to a previous high of 31% in 2004). Factors potentially impacting this number may be the sampling issues noted at the beginning of the report as well as the difficulties in traveling around ASU because of light rail construction.

As found in previous studies, work continues to be a top destination for riders, up significantly to a high of 39%. Those most likely to cite work were those under the age of 35 (53% compared to 28% for those older) and those with a high school education (62% compared to 20% who have at least some college or more). More than one in four riders (27%), cited shopping as their destination, again most likely to be mentioned by riders with a high school education (45% compared to 20% with at least some college or more). Recreational activities rounded out the top three destinations at 15%, married couples being more likely to cite this than their single counterparts (23% compared to 8%). Table 11 on the following page contains a detailed list of all the destinations mentioned by Tempe bus riders.

Bus Rider Destinations

(Among Bus Riders.)



2006 n=119* weighted data

Table 11: Where Bus Riders Go
(Among bus riders)

Responses	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=115)	1998 (n=87)
Work	39%	30%	32%	31%	26%
Shopping	27%	27%	28%	26%	24%
Recreational act.	15%	17%	20%	16%	7%
Errands	14%	11%	5%	5%	10%
ASU	14%	31%	18%	22%	25%
Dr. appointments	10%	6%	6%	4%	6%
Airport	6%	3%	3%	-	-
Visit friends/family	6%	6%	11%	9%	10%
Downtown Tempe	5%	3%	3%	5%	2%
Downtown (unspecified)	4%	-	5%	-	-
Home	4%	-	1%	1%	1%
Library	2%	-	2%	-	-
Community college	2%	4%	6%	4%	4%
Where need to go – “around” Tempe	2%	-	1%	5%	1%
Scottsdale	1%	-	-	-	-
Court/Jury Duty	1%	3%	3%	-	-
Other	5%	4%	-	-	-

Q15: Where do you go when you ride the bus?

*2006 data weighted

2. Travel to Arizona Mills

Approximately one in four Tempe bus riders have taken a bus to Arizona Mills Mall (26%), down from a high of 37% in 2004. This is the first year that the mall has experienced a drop as a destination after a period of significant growth.

Those most likely to have ridden a bus to the mall include:

- Those under the age of 35 (34%)
- Females (32%)
- Individuals who are married (32%)
- Respondents with a high school education or some college (44% and 33% respectively)

Almost two out of three riders who go to Arizona Mills Mall go there to shop (66%), while a growing number (17% compared to only 7% in 2004) are going there to transfer to another bus route. An additional 13% go there to work. Interestingly, two reasons not previously mentioned in this tracking study for visiting the mall was “to exercise” and “movies/entertainment” (10% and 5% respectively).

Table 12: Arizona Mills
(Among bus riders)

	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=115)
Ride Bus to AZ Mills	26%	37%	32%	23%
Reason For Trip				
Shopping	66%	78%	83%	81%
To transfer to another bus route	17%	7%	2%	-
Work	13%	9%	6%	8%
Movies/entertainment	10%	-	-	-
Exercise/walk at mall	5%	-	-	-
Other	8%	7%	6%	15%

Q18a-b: Do you ever ride the bus to Arizona Mills? If YES, Why do you go there?

*2006 data weighted

E. Finding Information about Bus Schedules

As seen in past studies, the **Bus Book continues to be the main source of information that riders turn to when in need of information about bus schedules**, (49%, down slightly from 54% in 2004). Males are slightly more likely to use the Bus Book (54% compared to 43% of females), as are riders with a high school education (73%), and those with incomes under \$40,000 (59%).

This year, more than one third of riders surveyed used the Internet to look up bus schedule information online. The Internet continues to grow as a resource for bus riders (35%, up from 26% in 2004). Those most likely to utilize the Internet are those under the age of 49 (44% compared to 17% of those older), and riders with at least some college or more (44% compared to 10% who have only graduated high school).

Valley Metro's 602-253-5000 number maintains its popularity remaining consistent at 15% this year with females being more likely than males to call the service (23% compared to 10%).

Table 13: Bus Schedule Information
(Among bus riders)

Responses	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=98)
Bus Book	49%	54%	41%	37%
Internet	35%	26%	10%	8%
Call (602) 253-5000	15%	16%	10%	14%
Route maps at bus stops	13%	15%	9%	5%
Friend/Family	5%	1%	7%	8%
Newspaper	3%	-	1%	2%
Library	1%	2%	3%	3%
Other	7%	-	-	-
Don't know	3%	5%	-	-

Q19: How do you get your information about bus schedules?

*2006 data weighted

F. Satisfaction with Bus Service

1. Satisfaction Ratings

Bus riders were asked to rate their level of satisfaction with eight different aspects of riding the bus. Riders rated the categories by using four-point nominal scales (“very satisfied,” “somewhat satisfied,” “not very satisfied,” and “not at all satisfied”). **The vast majority of bus riders indicated overall satisfaction with the Tempe bus system (80%; 45% “very satisfied” + 35% “somewhat satisfied”).** While this reflects a drop from 2004’s overall rating of 91%, it should be noted that this year’s “very satisfied” rating is actually up from 40% in 2004 to 45% this year.

Cleanliness and ease of using the bus received the highest satisfaction ratings from Tempe bus riders (83% and 82% respectively), while safety rounded out the top three at 80%.

Overall, however, ratings on all attributes were down in comparison to 2004. As in years past, driver courtesy received the highest “very satisfied” rating (55%), followed by ease of using the bus (54%) and ease of reading and understanding the schedule and maps (52%).

While overall satisfaction with comfort on the bus fell from 95% in 2004 to 76% this year, it was rated particularly high with those over the age of 50 (87%), and with those at least some college (81%). Reliability and route frequency continue to receive the lowest satisfaction ratings among Tempe bus riders (69% and 70% respectively).

Table 14: 2006 Satisfaction with Bus Service
(Among bus riders)

Attributes	2004 Net Satisfied (n=146)	2006 (n=119)*		
		Net Satisfied*	Very Satisfied	Somewhat Satisfied
Overall Satisfaction with Bus System	91%	80%	45%	35%
Cleanliness of the bus	93%	83%	51%	32%
Ease of using the bus	93%	82%	54%	28%
Safety on the bus	92%	80%	50%	30%
Driver courtesy and professionalism	94%	79%	55%	23%
Ease of reading and understanding the schedule and maps	82%	77%	52%	25%
Comfort on the bus	95%	76%	49%	28%
Route frequency	78%	71%	41%	30%
Reliability/on-time performance of buses	80%	69%	41%	28%

Q16: In general how satisfied are you with...*Includes Very Satisfied + Satisfied Ratings.

*2006 data weighted

G. Advice for Potential Riders

When asked what they would tell someone who was consider using the bus in Tempe, three out of four bus riders gave advice that was of a positive nature. **Approximately three out of seven riders (42%) indicated they would tell potential riders to “give it a try,” which is consistent with past years.** Other positive advice offered by riders - the bus provides good service 8%, saves gas money because is cheaper than driving 7%, and is good for the environment (6%). Other riders gave practical advice such as being sure to check the route schedule ahead of time (7%) and leaving enough time / being flexible (4%).

Table 15: Advice for New Riders
(Among those who have ridden in the past year)

Responses	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=115)
Positive				
Give it a try	42%	53%	36%	28%
Bus provides good service	8%	8%	14%	2%
Saves gas money /cheaper than driving	7%	-	-	-
Good for environment	6%	1%	6%	14%
Cheaper than a cab	3%	5%	3%	15%
Less stress	3%	2%	1%	4%
Easy to use	3%	-	-	-
You can take your bike	1%	-	-	-
Safer than driving car	1%	1%	-	-
Practical/Neutral				
Check route and make a schedule	7%	14%	10%	6%
Leave enough time	4%	5%	1%	6%
Use bus if have flexible timing	3%	1%	2%	-
Have patience	2%	-	-	-
Depends on the situation	2%	3%	1%	24%
Buy Bus Card	2%	-	-	-
Prepare for heat/bring water	2%	-	-	-
Better than walking in the heat	1%	-	-	-
Negative				
Find other option/last resort	4%	-	-	-
If you don't have specific time schedule	3%	-	-	-
Takes too long/bus is always late	3%	1%	3%	-
Not safe (bus/bus stops/people)	3%	-	-	-
Don't do it	2%	-	-	-
If have own car use it, if not ride bus	2%	3%	7%	-
Other	8%	2%	10%	5%
Don't know/not sure	7%	6%	14%	4%

Q19: If someone asked you whether or not they should start riding the bus, what advice would you give them? *2006 data weighted

Approximately one out of six comments (17%), could be construed as negative in nature, primarily recommending that potential riders look for other options and use the bus as a last resort (4%), or expressing the sentiment that the bus is unreliable if you have an inflexible schedule, that the bus takes too long and is always late, or that the bus is not safe (all mentioned by 3% of riders).

V. Tempe In Motion (TIM)

A. Awareness of Tempe in Motion

Awareness of Tempe in Motion (TIM) among residents was measured at approximately 38% this year; significantly lower than 2004's 51% rating, but within the range of what we have seen in previous year's findings. Those most likely to be aware of TIM are males (74%), residents under the age of 35 (81%) and current bus riders (85%). In addition, 67% of residents were able to correctly identify the meaning of "TIM" as Tempe in Motion (compared to 72% in 2004, and 57% in 2003).

Table 16: Awareness of TIM

	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)
Total Awareness (Unaided + Aided)	38%	51%	39%	38%
Unaided Awareness	18%	22%	8%	12%
Aided Awareness	21%	29%	31%	26%
Meaning of TIM	(n=155)	(n=205)	(n=152)	(n=154)
"Tempe in Motion"	67%	72%	57%	55%
Other	6%	2%	1%	9%
Don't know	28%	27%	43%	36%

Q21: 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?

*2006 data weighted

B. Source of Awareness (Among those Aware)

Residents who were aware of TIM were most likely to indicate they became aware through signs on the bus (20%). Other top sources included television and street banners (both mentioned by 19%), with males being more likely to mention TV.

This indicates a slight change from previous years' findings when street banners were the most mentioned source (28% in 2004). Those most likely to mention street banners were females (25%) and those under the age of 35 (25%). TV, print ads and signs on buses have consistently been the top four resources, but never in such comparable numbers.

Table 17: Source of TIM Awareness
(Among those aware)

Responses	2006* (n=155)	2004 (n=205)	2003 (n=152)	2001 (n=154)
Signs on the buses	20%	12%	16%	18%
TV	19%	16%	10%	23%
Street banner	19%	28%	24%	21%
Print ads	15%	12%	16%	19%
Internet	4%	2%	1%	2%
Direct mail	4%	5%	9%	6%
Radio	3%	1%	1%	7%
Library	3%	3%	3%	-
Word of mouth	3%	3%	4%	3%
Bill inserts	3%	2%	4%	2%
At work	3%	-	-	3%
School/ASU	2%	-	-	-
Driving around	2%	-	-	-
Signs (general)	1%	1%	3%	-
Cinema/movie slides	1%	1%	2%	1%
Bus book	1%	1%	2%	-
Other **	8%	3%	3%	4%
Don't know	14%	20%	16%	13%

Q23: How did you hear about it? (Among those aware)

*2006 data weighted

** Other indicates a less than 1% consensus

C. TIM Advertising

1. Awareness and Source of Advertising

Those who were aware of TIM were asked if they had seen or heard any advertising for the program. Again, as found in previous studies, more than half (58%) remembered seeing ads, up slightly from 54% in 2004.

When asked where they had seen the advertising, television was the most prominent response (56%), followed by newspaper or print advertising (19%), and street banners (16%). Again, males were most likely to cite television (67%), while current bus riders and those with annual incomes over \$40,000 were more likely to cite newspaper or print ads. A wide variety of other media sources were also listed by residents and are detailed in the following table.

Table 18: Source of TIM Advertising Awareness
(Among those aware of TIM)

	2006* (n=155)	2004 (n=205)	2003 (n=152)	2001 (n=154)
Aware of TIM advertising	58%	54%	51%	60%
Source of Advertising	(n=89)	(n=110)	(n=78)	(n=93)
TV	56%	50%	26%	48%
Newspaper/Print ads	19%	-	3%	-
Street banner	16%	26%	26%	15%
Signs on buses	8%	8%	17%	-
Signs (general) / Downtown Tempe	2%	-	3%	-
Bus stop	2%			
Direct mail	2%	3%	6%	10%
Other	5%	4%	3%	8%
Don't know	13%	4%	12%	6%

Q24-24a: Do you remember hearing or seeing any advertisements for TIM? Where did you see the advertising for TIM?

*2006 data weighted

2. Advertising Message

For those aware of TIM advertising, approximately one third (34%), recalled hearing a message that promoted a specific benefit of riding the bus – saving money was cited by 8%, helps the environment (7%) and general encouragement to take the bus or try an alternative mode of transportation (6% and 4% respectively) along with saving time, saving gas and being easy (all cited by 4%). As a comparison, 11% recalled seeing the general name, “TIM” or the TIM logo being promoted.

Table 19: TIM Advertising Message
(Among those aware)

Responses	2006* (n=89)	2004 (n=110)	2003 (n=78)	2001 (n=93)
Riding bus saves you money	8%	7%	-	-
“TIM” – Tempe in Motion	8%	-	21%	12%
Riding the bus/bike good for environment	7%	15%	-	-
Encourage people to take the bus	6%	-	5%	13%
Saves time/fast	4%	-	-	-
Riding the bus/bike is easy	4%	10%	-	-
Promotion of using alternate modes	4%	6%	9%	11%
Riding bus saves gas	4%	-	-	-
Remember logo	3%	2%	-	-
“Leave the driving to us”	2%	-	-	-
Cut down on traffic	3%	-	-	-
Riding the bus is convenient	2%	-	-	-
Other**	19%	7%	5%	8%
Don’t know	44%	59%	47%	47%

Q24b: What messages do you recall?

*2006 data weighted

** Other indicates less than 1% consensus

3. Advertising Effect on Perception of Tempe Bus System

As in previous years, more than half (52%) of those aware of TIM advertising indicated it had a positive effect on their perceptions of the bus system in Tempe. Females (66% compared to 44% of males) and those in the 35 to 49 age bracket (70% compared to 39% of those younger and 52% of those older) were most likely to say the ads made them think more positively towards the bus system.

Males were more likely to indicate that the advertisements had no effect on their perception of the bus system (52% compared to 29% of females) as well as though under the age of 35 (57% compared to 34% for those older). There were no statistically significant demographic characteristics for those who felt that the ads caused them to think negatively, but it should be noted that this is the first year in its five-year history that the study has measured any negative reaction from the sample.

Table 20: Advertising Affect on Perception
(Among those Aware of TIM advertising)

	2006* (n=89)	2004 (n=110)	2003 (n=78)	2001 (n=93)
Make you think more positively about the bus system in Tempe	52%	53%	44%	54%
Have no effect on your perceptions	43%	44%	46%	45%
Make you think negatively about the bus system in Tempe	4%	-	-	-
Don't know	1%	4%	10%	1%

Q24c: How did the advertising affect your perception of the bus system in Tempe?
Did it...

* 2006 data weighted

VI. Miscellaneous Issues

A. Bicycle Usage

The number of residents surveyed who report having access to a bicycle dropped slightly this year to 53% from 57% in 2004. For those who have a bike, riding patterns mirror past years with approximately half stating that they ride at least once a month (51%). One in four say they ride their bikes at least ten times each month (25%). Those most likely to report they ride their bike frequently (10+ times or more a month) are those under the age of 35 (33%) and singles (30%).

Table 21a: Access to and Frequency of Bike Use

	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)	1998 (n=401)
Have access to bike	53%	57%	56%	58%	60%
Frequency					
Never/occasionally	32%	32%	36%	33%	35%
Once or twice	19%	21%	18%	13%	16%
Three to five times	14%	12%	14%	17%	14%
Six to ten times	8%	6%	8%	8%	8%
10+ times	25%	25%	21%	27%	26%
Don't know/not sure	2%	3%	3%	2%	2%

Q25-26: 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.)

* 2006 data weighted

Table 21b: Access to and Frequency of Bike Use

	2004 (n=405)	2006* (n=407)	Gender		Age		
			Male (n=128)	Female (n=88)	18-34 (n=72)	35-50 (n=65)	50+ (n=76)
Have access to bike	57%	53%	62%	44%	59%	66%	42%
Frequency							
Never/occasionally	32%	32%	29%	37%	26%	32%	39%
Once or twice	21%	19%	17%	22%	17%	20%	20%
Three to five times	12%	14%	15%	11%	13%	12%	15%
Six to ten times	6%	8%	9%	7%	9%	11%	6%
10+ times	25%	25%	27%	21%	33%	25%	17%
Don't know/not sure	3%	2%	3%	1%	2%	-	3%

Bold denotes statistical significance at the 95% confidence level.

* 2006 data weighted

Those who have a bike but only ride it occasionally were asked why this was the case (n=69).

For more than one in four bike riders, the Arizona heat was the most common reason given for not riding their bike more often (28%), with an additional 24% stating they were simply too old or were not physically able to due to a health condition or injury (listed by 12% each). Other common reasons included a stated preference for walking (9%), distances being too far to ride (7%) and simply being too lazy and not wanting to ride (6%).

As found in previous studies, bicycles continue to reportedly be ridden for exercise (59%).

Individuals with incomes over \$80,000 per year (77%), married residents (72%), residents over the age of 35 (69%), and current bus riders (68%) are most likely to report that they ride their bike for exercise purposes. Frequent destinations include work and school (24%) and the store (14%), both down slightly from 2004. Gains for this year include more riders reporting riding their bike to the park (8%), on general errands (5%) and to downtown (3%) as destinations. The following page contains a table detailing the specific locations listed by Tempe bike riding residents.

Table 22: Where Bike Riders Go

Responses	2006* (n=142)	2004 (n=157)	2003 (n=142)	2001 (n=404)	1998 (n=401)
Exercise	59%	58%	59%	64%	56%
Work/school	24%	29%	30%	32%	26%
Store	14%	22%	12%	14%	24%
Park	8%	4%	6%	8%	6%
Run errands	5%	-	2%	-	-
Downtown (general)	3%	-	-	-	-
Anywhere/Everywhere	3%	-	1%	-	-
Friend's house	2%	4%	4%	5%	6%
Mill Avenue/ Downtown Tempe	2%	2%	2%	-	-
ASU/Library	1%	2%	1%	1%	4%
Tempe Town Lake	1%	1%	1%	-	-
Bank	1%				
Other	3%	2%	1%	3%	11%
Don't know/not sure	-	3%	-	2%	1%

Q26b: Where do you go when you ride your bike?

*2006 data weighted

B. Tempe Neighborhood Circulator Bus Program

Approximately one of four Tempe residents surveyed (25%), report being aware of the city's **Neighborhood Circulator Bus program**. Males (30%), current bus riders (37%), and those with an annual income under \$80,000 (29%), are most likely to report familiarity. **Once informed of the service, an encouraging 82% of residents stated they would support the program in their own neighborhood and 58% indicated they would be "somewhat" or "very" likely to use the circulator.** Those most likely to support the program are those under the age of 35 (90%) and current bus riders (89%).

Those most likely to use the a Tempe Neighborhood Circulator Bus, indicating "very or somewhat likely" to use are:

- Current bus riders (76%)
- High School graduates (68%)
- Females (66%)
- Those under the age 50 (56%)
- Those with an annual income under \$40,000 (32%)

Table 23: Tempe Neighborhood Circulator Bus

	2006* (n=407)
Aware of TNCB	25%
Likelihood to SUPPORT	82%
Likelihood to USE	
Very likely	23%
Somewhat likely	35%
Not very likely	20%
Not at all likely	20%
Don't know	3%

Q33: Are you aware of Tempe's Neighborhood Circulator bus program?

Q34: How likely are you to support a TNCBP in your neighborhood?

Q35: How likely would you be to use a TNCB if there was one in your area?

*2006 data weighted

For those indicating they are not likely to use the circulator bus, the dominant response is a stated preference to drive because they like their car (38%). Other reasons provided include the belief that they don't travel far enough for anything to warrant using the bus and that they would rather use their bike (both listed by 7%), while the perception that the bus is too slow/driving is faster or feeling that the service is not needed were both listed by 6%. An additional 5% stated that the places they need to go are either not in Tempe or that the times and schedule offered do not fit their needs (also 5%). See Table 24 for a detailed listing of reasons provided by Tempe residents who indicated they were not likely to use a circulator bus.

Those most likely to state that they were "not at all likely" to support a Tempe Neighborhood Circulator bus program in their area were:

- Residents over the age of 50 (26%)
- Long-term residents of Tempe who have resided in the city 20+ years (26%)
- Those who have not ridden a bus in the last year (24%)

Table 24: Why not Likely to Use Tempe Neighborhood Circulator Bus

Reasons	2006* (n=160)
Like my car/rather drive	38%
Rather ride my bike	7%
I don't travel far	7%
Too slow/driving is faster	6%
Don't need it	6%
I go farther than Tempe/doesn't go where I need	5%
Times are not convenient/fit my schedule	5%
Don't go out much/no place to go	4%
Have our own bus system/Use regular bus	3%
Too old/difficult for elderly	3%
Inconvenient	3%
I can walk where I want to go	3%
Not safe	2%
Have kids to pickup/drop off	2%
Too much planning/coordination	2%
Need car for work	2%
Health issues/handicapped	2%
Hard to get off/on	1%
Not practical for grocery shopping	1%
Other	6%
Don't know	4%

Q34b: Why are you not likely to use a TNC bus?

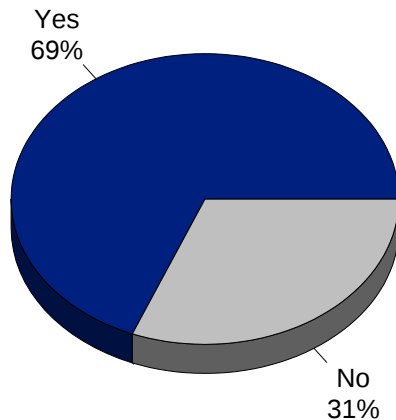
* 2006 data weighted

C. Tempe Youth Free Bus Pass Program

Among the Tempe residents surveyed, 34% indicated they had children residing in the home. Within the 137 homes that had children, 69% indicated they had at least one child six years old or older, with 32% of those stating that their children ride a city bus.

Households with Children 6 years+

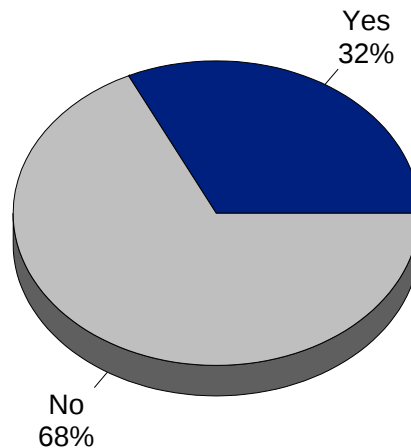
(Among those HH with Children)



2006 n= 137 * data weighted

Children as City Bus Riders

(Among those HH with Children 6+)

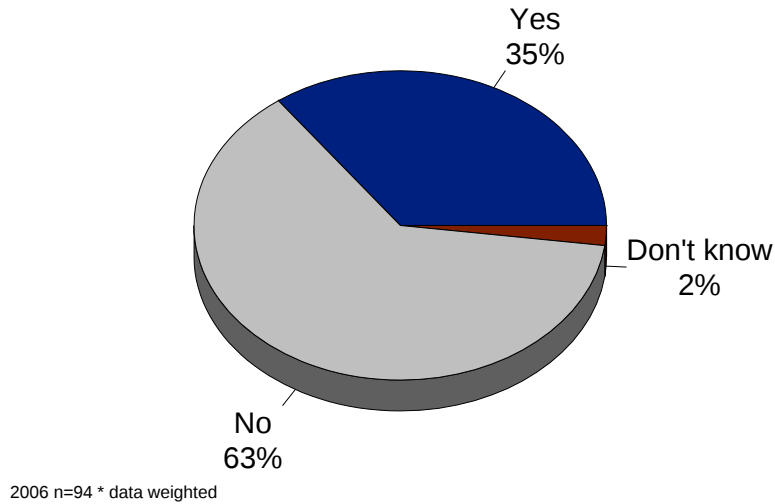


2006 n=94 * data weighted

Among the 94 homes surveyed that have children six years of age or older, 35% indicated they had heard of the Tempe Youth Free Bus Pass. Those most likely to be familiar with the Pass were over the age of 35 (43%) and those who have resided in Tempe for more than 5 years (43%).

Awareness of Tempe Youth Free Bus Pass

(Among those HH with Children 6+)



Word of mouth was the most commonly cited source of information for parents whom were familiar with the Tempe Youth Bus Pass program (27%), with school and the library both warranting frequent mentions (21% and 12% respectively). A few mentioned hearing about it as work (10%), while the Bus Book was mentioned by 8%.

Table 25: Sources for Tempe Youth Bus Pass Program Information
(Among those aware of the program)

Sources	2006* (n=33)
Word of mouth (friends/family)	27%
Through school	21%
Library	12%
Employer/Work	10%
Bus Book	8%
Letter from the City	6%
Advertisement	5%
Web site	3%
Other	5%
Don't know	3%

QD6d: How did you hear about the Tempe Youth Free Bus Pass Program?

*2006 data weighted