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City of Tempe Transit Survey Report

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 January 2001, January 2003, October 2004, September 2006, and September 2008. The survey was completed with 427 Tempe residents in September 2010. The margin of error for this sample size is approximately $\pm 4.7\%$ at a 95% confidence level.

Rider Characteristics and Opinions

- The percentage of Tempe residents reporting to have ridden a bus (i.e., Orbit, Flash or city bus) in Tempe in the past year has increased significantly from 2008 (from 39% to 48%). This is the highest percentage ever reported. Those who ride the bus in Tempe one to five times a month also increased significantly (from 14% to 25%).
 - Residents most likely to have ridden the bus 20 or more times in the past year continue to be single (18%), residents with a high school education (20%) and those with an annual income under \$40,000 per year (22%).
- Almost three in five Tempe residents indicated they have ridden the light rail system in the past year (58%). The majority, however, have only ridden it one to five times (40%).
 - Residents most likely to have ridden the Metro light rail system more than 20 times in the past year are residents living in 85281 (12%), those with household incomes under \$40,000 (11%), and single residents (11%).
- It is important to note, that with the addition of light rail to the transit system in Tempe, the percentage of residents using some form of public transit has nearly doubled: 39% to 71%.
- The percentage of new transit users (14% riding for less than one year) dropped significantly compared to 2008 (31%), but is similar to the level measured in 2006 (17%). As might be expected, the increase in new riders noted in 2008 appears to have shifted to the riding for one to two year category in 2010 causing this percentage to significantly increase (up to 27% from 13% in 2008).
- Of significance, this is the second consecutive wave of research that indicates more riders are taking transit out of choice. The primary reason residents are using public transit is because it is convenient (24%).

- Approximately one in ten riders (9%), indicate they take public transit because they “don’t have a car,” which is down significantly from previous years (9% vs. 16% in 2008 and 29% in 2006).
- While work continues to be a top destination for riders, its prominence is diminishing. In contrast, recreational activities moved into the top position with 38% reporting using transit for leisure purposes (up significantly from 14% to 20% in the past nine years). Similarly, Phoenix/downtown Phoenix has emerged as a fourth most popular destination with 15% mentioning it (up from 5% in 2008 and virtually no mentions prior to that).
- When bus riders were asked to rate their level of satisfaction on seven different aspects of riding the bus, the percentage of riders giving high ratings was up for all but one attribute compared to 2008, returning to levels similar to 2006 and 2004. *Comfort* and *safety on the bus* received the highest satisfaction ratings from Tempe bus riders (both at 95% “very” or “somewhat” satisfied).
- More than one-half of transit users indicate they are likely to be riding public transit one year from now (52% give a “4” or “5” rating). This is down significantly from the two-thirds (66%) measured in 2008.

Overall Satisfaction and Improvements of Tempe’s Transit System

- Two-thirds of residents indicate they are satisfied with the transit system in Tempe (67% give a “4” or “5” rating); up six points from 61% in 2008. More than five in seven current riders (71%) report they are satisfied with the service and 53% of non-riders indicate they are satisfied.
- Residents satisfied with the transit system (rating it a “4” or “5”) mention good service (26%), good routes (16%), and frequent, reliable service (16%) as the foremost reasons for their satisfaction level.
- Residents mention needing better and more routes (24%) and more frequent buses with extended hours (18%) as the two main reasons they gave the Tempe transit system low satisfaction ratings (rating it a “1”, “2”, or “3”).
- Residents are most likely to identify providing more shade at bus stops as their top priority for the city (73%), followed by more bus pull outs (61%) and more reliable/on-time service (56%).

Potential Use of Tempe's Transit System

- When non-riders were asked why they do not ride the bus, approximately four in nine (45%) simply say they prefer their car.
- Most of the remaining reasons were related to convenience issues: takes too long (11%), bus does not go where they need to go (10%), bus stops are too far away (10%), and buses are not frequent enough (3%). An additional 8% feel public transit is generally inconvenient.
- When non-riders were asked to rate the effectiveness of five arguments for motivating public transit usage, “lowers air pollution” and “reduces traffic congestion” rank as the two most persuasive benefits to convince them to use public transit (72% and 68% agreeing, respectively). This is the first time reduced traffic congestion has been in the top two since 2003 when it last surpassed saving money.

Tempe In Motion (TIM)

- Awareness of Tempe in Motion (TIM) reached its highest level ever reported with more than one-half (54%) of residents aware of it. Unaided awareness reached its second highest level to date with 24% naming Tempe's transit program voluntarily (down slightly from the high of 27% measured in 2008). An additional 30% recognized the name “TIM” this year.
- Seven in 10 residents aware of TIM (69%) were able to correctly identify the meaning of “TIM” as Tempe in Motion (this is down five points from 2008).
- Residents who are aware of TIM are most likely to indicate they became aware through signs on the buses and street banners (both mentioned by 18% and 17%).
- For those who indicate they heard about TIM via advertising, nearly one in seven residents recall the general name “TIM” from the advertising (15%) and/or the general promotion of using alternate modes (15%).
- Almost three in five residents aware of TIM advertising (58%) indicate that it had a positive effect on their perceptions of the transit system in Tempe, similar to 2008.

Tempe Neighborhood Circulator

- More than half of Tempe residents (52%) report being aware of the city's neighborhood circulator bus program; this percentage is comparable to 2008 levels yet more than twice the number of residents who reported being aware of the circulator program in 2006 (25%).

- Among those aware of the neighborhood circulator, 80% are able to correctly identify the name of the bus as “Orbit.”

Tempe Bicycling and Walking

- The percentage of residents surveyed who report having access to a bicycle increased slightly this year to 58% from 56% in 2008 and 53% in 2006 and mirrors percentages reported in prior years.
- Among those who have a bike, almost two thirds (66%) report they ride their bike at least once a month. This is down from the record high monthly frequency levels recorded in 2008 (71%).
- Those who have a bike, but only ride it occasionally were asked why this was the case (n=86). More than one third of these occasional bike riders (36%) claim the Arizona heat is the main reason they do not ride their bike more often.
- As found in previous studies, bicycles continue to reportedly be ridden for exercise (60%). Frequent destinations for bike riders include work and school (24%) and the store (16%); these have consistently been the top destinations over the years.
- Nearly two-thirds of residents indicate they are satisfied with the quality of the walking and biking paths in Tempe (63% give a “4” or “5” rating). This is up from the 57% reported in 2008.
- One in five residents (20%) who report they are satisfied with the biking and walking paths indicate there are no problems with the paths and that they are fine the way they are. An additional 16% indicate there are plenty of paths throughout Tempe.
- The two main reasons residents gave low satisfaction ratings for the biking and walking paths are because they current paths are not safe (11%) and feel the number of paths should be increased (9%).
- When residents were given a list of possible improvements for the biking and walking paths in Tempe and then asked to indicate how high of a priority each improvement should be for the City of Tempe, residents are most likely to indicate making paths safer should be the top priority (70% give is a “4” or “5” rating).

Tempe Youth Free Transit Pass Program

- Nearly two in five Tempe residents (38%) indicate they have heard of the Tempe Youth Free Transit Pass. Word of mouth and the local schools continue to be the top two most

commonly cited sources of information for those who are familiar with the Tempe Youth Transit Pass program (27% and 21%).

Conclusions

1. Public transit usage overall among Tempe residents has increased significantly from 2008, as has the usage of the local city buses. The percentage of residents reportedly using public transit for more than one year also increased. It is likely that the addition of light rail to the public transit system for Tempe residents is largely responsible for these increases. The increase in riders reporting to use public transit for one to two years shows that many residents who “tried” light rail when it first opened, have continued to use this service.
2. The shift in primary destinations from work to recreation is another indication that the use and perceptions of public transit are changing. More riders are indicating that they are using public transit because it is “convenient” and fewer riders are reporting to use public transit because they “have to.”
3. Satisfaction with the city buses as well as overall satisfaction with public transit in Tempe has increased over the past two years. It is interesting to note, however, that despite high satisfaction and usage levels, significantly fewer transit users indicated they are likely to be using public transit a year from now than they did in 2008. Perhaps this decrease is more a reflection that residents reported a higher potential for transit usage in 2008 because of light rail, whereas the response this year is a more realistic percentage.
4. Interestingly, there was less demand among residents for increased frequency and scope of transit service than in previous years. The highest priorities suggested for the city this year were for increased shade at bus stops and more bus pull outs.
5. Awareness of “TIM” increased overall in 2010, although understanding of its meaning was down slightly. This means that residents are seeing and hearing about TIM through various sources, but an understanding of what TIM promotes is still developing. Among those aware, however, the name is associated with positive promotion of alternate mode usage.
6. Bicycle usage by Tempe residents continues to be high, but was down slightly from 2008. Residents in general are satisfied with the bike and pedestrian paths in Tempe; however, they believe the highest priority for the city should be to make current paths safer.

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 January 2001, January 2003, October 2004, September 2006 and September 2008.

Random calls of Tempe residents were made from WestGroup's interviewing center in Phoenix, Arizona during the month of September 2010. 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 as well as a representative distribution of the sample by age. RDD sample was used until the only quota remaining to be met was for residents between the ages 18 to 34. At that point in time, a listed sample from the Tempe zip codes was purchased so that residents in the target age group could be found expeditiously and in a cost effective manner.

The survey was completed with 427 Tempe residents. The margin of error for this sample size is approximately $\pm 4.8\%$ 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 1A: Demographics

	2010 (n=427)	2008 (n=424)	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)
Gender						
Male	49%	50%	51%	49%	50%	50%
Female	51%	50%	49%	51%	50%	50%
Years Lived in Tempe						
<1 year	2%	3%	7%	8%	8%	10%
1 – 2 years	5%	7%	10%	14%	11%	13%
3 – 5 years	10%	12%	16%	12%	16%	15%
6 – 10 years	15%	17%	15%	14%	18%	14%
11 – 20 years	19%	22%	17%	18%	16%	13%
20+ years	49%	39%	35%	34%	30%	34%
Age**						
18 – 34	33%	31%	30%	31%	31%	34%
35 – 54	34%	35%	25%	29%	29%	25%
55+	33%	34%	45%	39%	36%	40%
Average Age	47.7	47.6	50.3	45.8	44.2	44.9
Education						
Some high school	2%	1%	5%	2%	3%	3%
High school graduate	9%	9%	14%	12%	12%	12%
Some college	30%	31%	33%	34%	26%	40%
College graduate	29%	31%	30%	26%	29%	26%
Post graduate	29%	26%	18%	23%	27%	19%
No answer/Refused	1%	2%	2%	2%	4%	1%
Income						
<\$20,000	10%	12%	12%	15%	12%	15%
\$20 - \$40,000	14%	19%	20%	20%	19%	21%
\$40 - \$60,000	16%	15%	17%	17%	18%	18%
\$60 - \$80,000	14%	12%	11%	12%	14%	10%
\$80 - \$100,000	11%	10%	9%	5%	5%	7%
\$100,000+	17%	19%	15%	10%	13%	10%
No answer/refused	16%	13%	16%	21%	19%	19%
Average Income	\$67,047	\$64,500	\$51,500	\$53,700	\$57,700	\$53,500

* 2006 data weighted. **Between 2001-2006 age was reported in the following categories: 18-34, 35-49, 50+. In 2008 and 2010 age categories were updated as reported above.

Table 1B: Demographics

	2010 (n=427)	2008 (n=424)	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)
Marital Status						
Married	61%	53%	53%	53%	47%	48%
Single	36%	44%	44%	44%	48%	52%
Refused	3%	3%	3%	3%	5%	--
Occupation**						
Full-time	47%	51%	45%	-	-	-
Part-time	12%	12%	10%	-	-	-
Retired	23%	20%	27%	-	-	-
Student	7%	8%	4%	-	-	-
Housewife/	7%	5%	5%	-	-	-
Househusband						
Unemployed/ disabled	6%	4%	7%	-	-	-
Refused	1%	2%	3%	-	-	-
Zip Code						
85281	19%	19%	25%	-	-	-
85282	38%	38%	43%	-	-	-
85283	29%	29%	24%	-	-	-
85284	14%	14%	9%	-	-	-

* 2006 data weighted

**In 2008 question was changed to accept multiple responses.#

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II. Rider Characteristics and Opinions

A. Current Use of Public Transit

1. Riding the City Buses

The percentage of Tempe residents reporting to have ridden a bus (i.e., Orbit, Flash or city bus) in Tempe in the past year has increased significantly from 2008 (from 39% to 48%). This is the highest percentage ever reported. Those who ride the bus in Tempe one to five times a month also increased significantly (from 14% to 25%).

City Bus Usage in Tempe

Percentage of residents who have ridden a city bus in Tempe in the past year

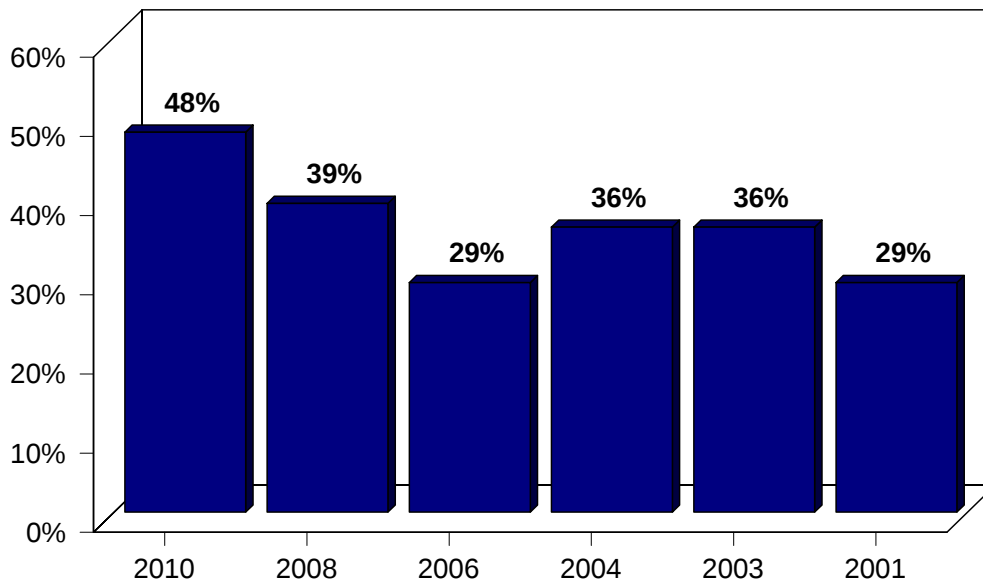


Table 2A: Frequency of Riding Bus in Tempe Past Year

#Times	2010 (n=427)	2008 (n=424)	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)
1 – 5 times	25%	14%	12%	16%	18%	18%
6 – 10 times	5%	5%	2%	5%	5%	3%
11 – 20 times	6%	4%	3%	2%	3%	1%
20+ times	12%	16%	12%	14%	10%	7%
NET RODE	48%	39%	29%	36%	36%	29%
None	52%	61%	70%	63%	61%	72%

Q4: How many times have you ridden a city bus (including Orbit, Flash and local bus) in Tempe in the past year? * Question changed in 2008 from: How many times have you ridden on a bus in Tempe in the past year? *2006 data weighted **Bold** denotes statistical significance at the 95% level.

Residents most likely to have ridden the bus 20 or more times in the past year continue to be single (18%), residents with a high school education (20%) and those with an annual income under \$40,000 per year (22%). **In prior years males and those under the age of 35 were significantly more likely than their comparative groups to report riding the bus frequently (20+ times in the past year), however this is no longer true. Residents living within the zip code 85281 are significantly more likely to be frequent bus riders (22% have ridden 20+ times in past year vs. 12% for 85282, 10% for 85283 and 3% for 85284).**

Those most likely to report they EVER ride city buses are:

- Males (51% vs. 44%)
- Single (58% vs. 42%)
- Under 55 years (51% 18-34 and 54% 35 to 54 years vs. 38% for 55+)
- Those earning less than \$40K+ (66% vs. 44%)
- Those living in the 85281 zip code (72% vs. 42%)

**Table 2B: Frequency of Riding Bus in Tempe-2010
Demographic Breakdown**

	Gender		Age			Income	
	Male (n=209)	Female (n=218)	18-34 (n=134)	35-54 (n=136)	55+ (n=136)	<\$40K (n=103)	\$40K+ (n=256)
1 – 5 times	27%	23%	27%	28%	20%	29%	25%
6 – 10 times	5%	4%	3%	6%	4%	5%	4%
11 – 20 times	5%	7%	8%	6%	4%	9%	6%
20+ times	14%	10%	13%	14%	10%	23%	9%
NET RODE	51%	44%	51%	54%	38%	66%	44%
None	49%	56%	49%	46%	62%	34%	58%

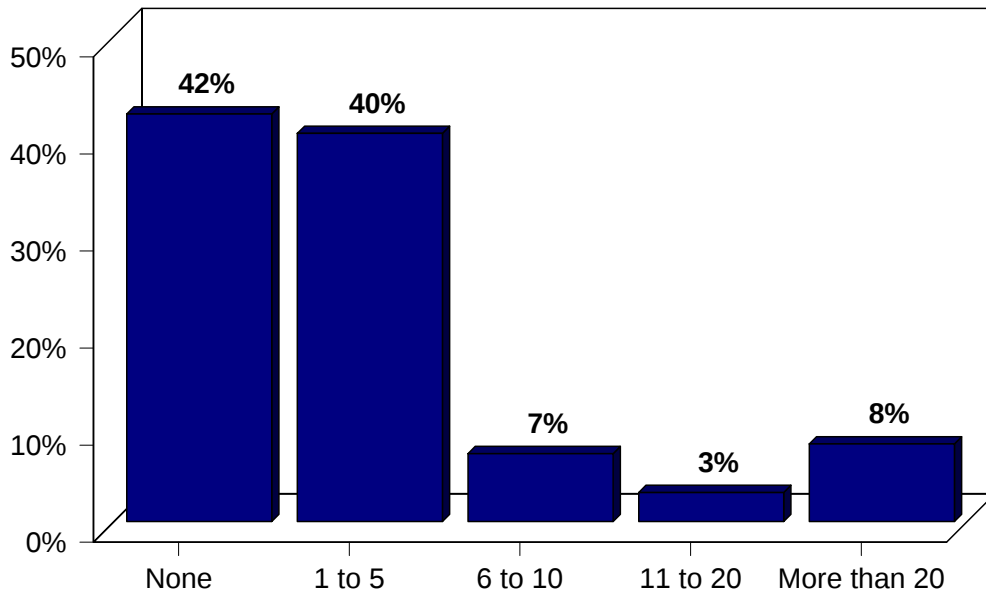
*Q4: How many times have you ridden a city bus (including Orbit, Flash and local bus) in Tempe in the past year? * Question changed in 2008 from: How many times have you ridden on a bus in Tempe in the past year to how many times have you ridden METRO light in Tempe in the past year?*

Bold denotes statistical significance at the 95% level.

2. *Riding the Metro Light Rail*

Almost three in five Tempe residents indicated they have ridden the light rail system in the past year (58%). The majority, however, have only ridden it one to five times (40%)

Metro Light Rail Usage in Past year



n=427

Residents most likely to have ridden the Metro light rail system more that 20 times in the past year are residents living in 85281 (12%), those with household incomes under \$40,000 (11%), and single residents (11%).

B. Length of Use of Transit System

The percentage of new transit users (14% riding for less than one year) dropped significantly compared to 2008 (31%), but is similar to the level measured in 2006 (17%). As might be expected, the increase in new riders noted in 2008 appears to have shifted to the riding for one to two year category in 2010 causing this percentage to significantly increase (up to 27% from 13% in 2008). The percentage of riders who have been using public transit for two or more years has remained steady, making up approximately half of all transit users (48%).

It is important to note, that with the addition of light rail to the transit system in Tempe, the percentage of residents using some form of public transit has nearly doubled: 39% to 71%.

Table 3: Length of Use of Transit System
(Among those who have ridden in the past year)

Time Riding	2010 (n=304)	2008 (n=166)	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=115)
Less than a year	14%	31%	17%	23%	30%	50%
1 – 2 years	27%	13%	27%	17%	13%	17%
2 – 4 years	13%	19%	20%	55%*	49%*	29%*
4 – 6 years	10%	13%	13%	-	-	-
6 years +	25%	20%	21%	-	-	-
Don't know	11%	4%	4%	5%	8%	4%

Q7: 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.

Bold denotes statistical significance at the 95% level.

C. Reasons for Using Public Transit

The primary reason residents are using public transit is because it is convenient (24%). This represents a significant increase compared to 2008 and 2006, but is in line with prior tracking data. Clearly the 2008 results, which had “saving money” in the top spot, were influenced by the historically high gasoline prices at that time. Only 4% cited saving money as a reason for using public transit in 2010 (vs. 17% in 2008 and similar to 3% to 9% previously).

Of significance, this is the second consecutive wave of research that indicates more riders are taking transit out of choice. **Approximately one in ten riders (9%), indicate they take public transit because they “don’t have a car,” which is down significantly from previous years (9% vs. 16% in 2008 and 29% in 2006).** Other reasons riders may be “forced” to use public transit include not having a vehicle available due to car problems or scheduling issues (5%) and not having a driver’s license (1%).

A notable change in 2010 is the increase in the percentage of riders saying the use public transit to avoid parking (7% up significantly from 3% in 2008 and 4% in 2006, but similar to prior years).

Table 4: Reasons for Using Public Transit
(Among those who have ridden in the past year)

Responses	2010 (n=304)	2008 (n=166)	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=115)
Convenient	24%	15%	14%	26%	20%	44%
Don’t have car	9%	16%	29%	36%	30%	37%
Get to/from recreation	7%	4%	2%	-	-	-
To avoid parking	7%	3%	4%	7%	6%	-
Just to try it out	6%	3%	-	-	-	-
Vehicle not available/having car problems	5%	2%	9%	5%	8%	-
To go downtown	5%	-	-	-	-	-
Protects environment	4%	2%	3%	3%	1%	7%
Saves money	4%	17%	8%	9%	6%	3%
Get to/from school	2%	7%	5%	-	-	-
Get around (general)	2%	7%	3%	-	-	-
Get to/from work	2%	5%	6%	-	-	-
Dislike driving/take a break	2%	2%	1%	-	-	-
It’s free; paid for by work/school	1%	4%	-	-	-	-
Don’t have license	1%	2%	1%	1%	2%	4%
To get to/from airport	1%	-	-	-	-	-
Other (includes responses <1% of consensus)	3%	6%	8%	3%	6%	5%
Don’t know	5%	4%	1%	1%	-	-

Q8: What is the main reason you ride the bus? * Question changed in 2010 to: What is the main reason you ride public transit? *2006 data weighted **Bold** denotes statistical significance at the 95% level.

D. Travel Destinations

This year “recreational activities” ousted “work” as the top destination for transit riders.

While work continues to be a top destination for riders, its prominence is diminishing. In 2010, it dropped to 20% from 31% in 2008, 39% in 2006 and from 30%+ previously.

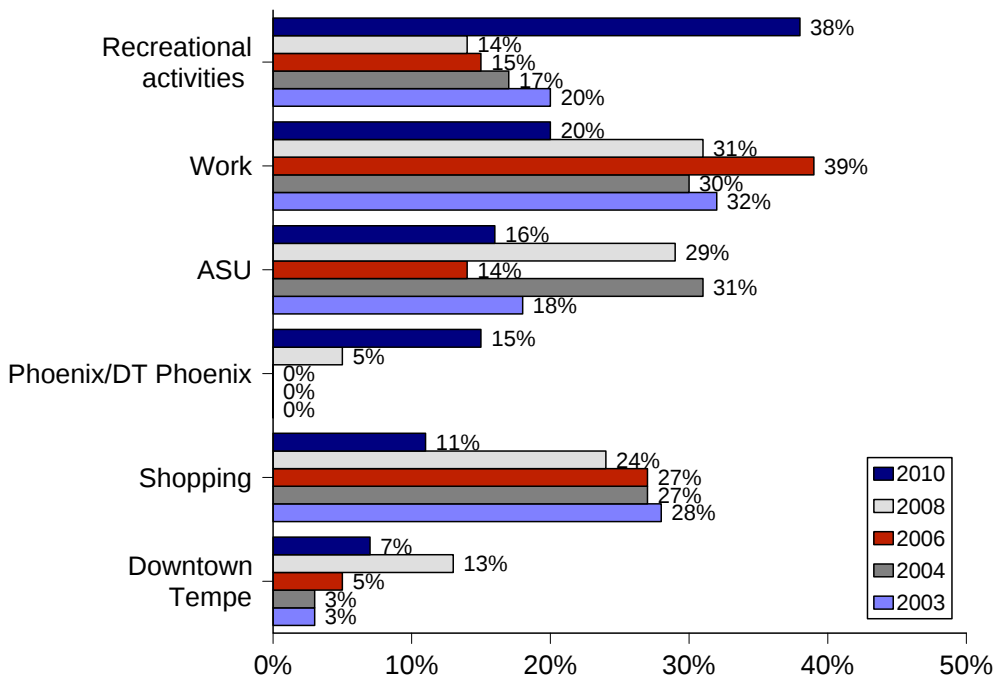
In contrast, recreational activities moved into the top position with 38% reporting using transit for leisure purposes (up significantly from 14% to 20% in the past nine years).

Similarly, Phoenix/downtown Phoenix has emerged as a fourth most popular destination with 15% mentioning it (up from 5% in 2008 and virtually no mentions prior to that). It appears likely these changes are due to residents using light rail to attend sporting events, concerts or other attractions in Phoenix.

Despite a significant decrease since 2008, ASU continues to be among the most popular destinations (16% down from 29% in 2008). The percentages found this year more closely reflect percentages found in previous studies.

Top Transit User Destinations

(Among Transit Users)



2003: n=146, 2004: n=148, 2006: n=119, 2008: n=166, 2010: n=304

The percentage of transit users citing shopping (11%) and downtown Tempe (7%) as their destinations decreased significantly since 2008 (24% cited shopping and 13% cited downtown Tempe). While shopping has fallen to its lowest level to date, downtown Tempe returned to levels typically measured.

Table 5: Public Transit Trip Destinations
(Among public transit users)

Responses	2010 (n=304)	2008 (n=166)	2006* (n=119)	2004 (n=148)	2003 (n=146)	2001 (n=115)
Recreational act.	38%	14%	15%	17%	20%	16%
Work	20%	31%	39%	30%	32%	31%
ASU	16%	29%	14%	31%	18%	22%
Phoenix/ DT Phoenix	15%	5%	-	-	-	-
Shopping	11%	24%	27%	27%	28%	26%
Downtown Tempe	7%	13%	5%	3%	3%	5%
Errands	5%	7%	14%	11%	5%	5%
Downtown (gen.)	5%	6%	4%	-	5%	-
Restaurant	3%	-	-	-	-	-
Library	2%	7%	2%	-	2%	-
Around the neighborhood	2%	2%	-	-	-	-
Dr. appointments	2%	5%	10%	6%	6%	4%
Visit friends/family	2%	5%	6%	6%	11%	9%
School unspecified	2%	2%	-	-	-	-
High School	2%	3%	-	-	-	-
Airport	2%	2%	6%	3%	3%	-
Community college	2%	2%	2%	4%	6%	4%
Where need to go – “around” Tempe	1%	2%	2%	-	1%	5%
Court/Jury Duty	1%	-	1%	3%	3%	-
Home	-	2%	4%	-	1%	1%
Other	2%	3%	5%	4%	-	-

Q9: Where do you go when you ride the bus? * Question changed in 2010 to: Where do you go when you use public transit?

*2006 data weighted **Bold** denotes statistical significance at the 95% level.

E. Satisfaction with Bus Service

Bus riders were asked to rate their level of satisfaction with seven 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”). **This year, the percentage of riders giving high ratings was up for all but one attribute compared to 2008, returning to levels similar to 2006 and 2004.**

Comfort and safety on the bus received the highest satisfaction ratings from Tempe bus riders (both at 95% “very” or “somewhat” satisfied). Driver courtesy and professionalism, bus cleanliness, and ease of using the bus followed closely behind and round out the top five (93% to 91% indicate satisfaction).

Although reliability and route frequency continue to receive the lowest satisfaction ratings among Tempe bus riders (80% and 74% respectively), satisfaction with reliability was up by four percentage points compared to 2008. Satisfaction with route frequency was the only measure that declined compared to 2008 and it did so by four percentage points (74% vs. 78%).

Table 6: 2010 Satisfaction with Bus Service
(Among bus riders)

Attribute	2010 (n=203)			2008 Net Satisfied* (n=166)	2006 Net Satisfied* (n=119)	2004 Net Satisfied (n=146)
	Net Satisfied*	Very Satisfied	Somewhat Satisfied			
Comfort on the bus	95%	61%	34%	93%	95%	95%
Safety on the bus	95%	60%	35%	92%	92%	92%
Driver courtesy and professionalism	93%	65%	28%	89%	94%	94%
Cleanliness of the bus	92%	55%	37%	89%	93%	93%
Ease of using the bus	91%	56%	35%	90%	93%	93%
Reliability/on-time performance of buses	80%	41%	39%	76%	80%	80%
Route frequency	74%	37%	37%	78%	78%	78%

Q10: In general how satisfied are you with... *Includes Very Satisfied + Satisfied Ratings.

* Note: In 2010, question asked only of bus riders, not light rail users *2006 data weighted

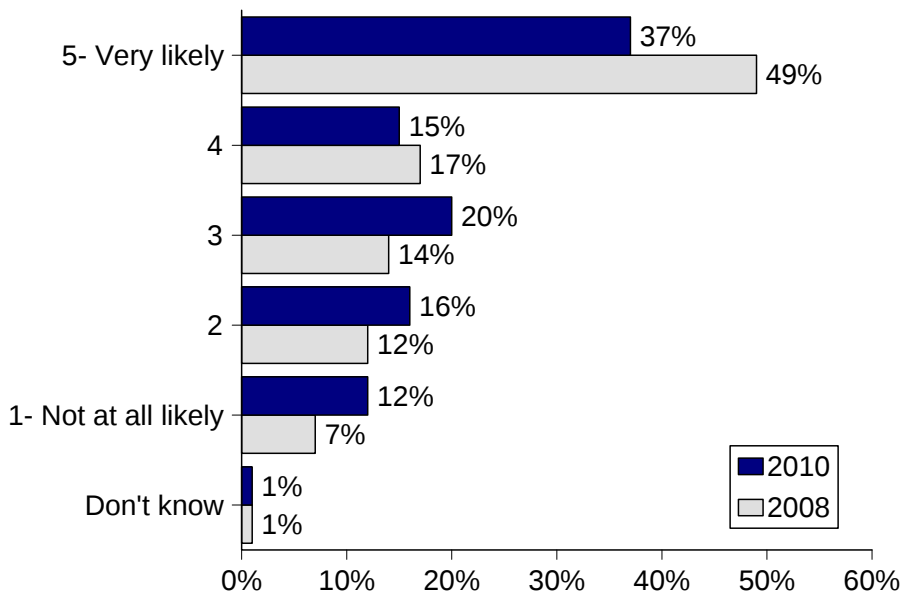
F. Likelihood to Use Public Transit One Year From Now

More than one-half of transit users indicate they are likely to be riding public transit one year from now (52% give a “4” or “5” rating). This is down significantly from the two-thirds (66%) measured in 2008.

Those most likely to continue using public transit are users ages 35 to 54 (57% 4 or 5 rating) and residents living in the zip code areas of 85281 and 85282 (61% and 58%, respectively).

Likelihood to Ride Public Transit

How likely are you to ride public transit one year from now?



2008 n=166; 2010 n=304

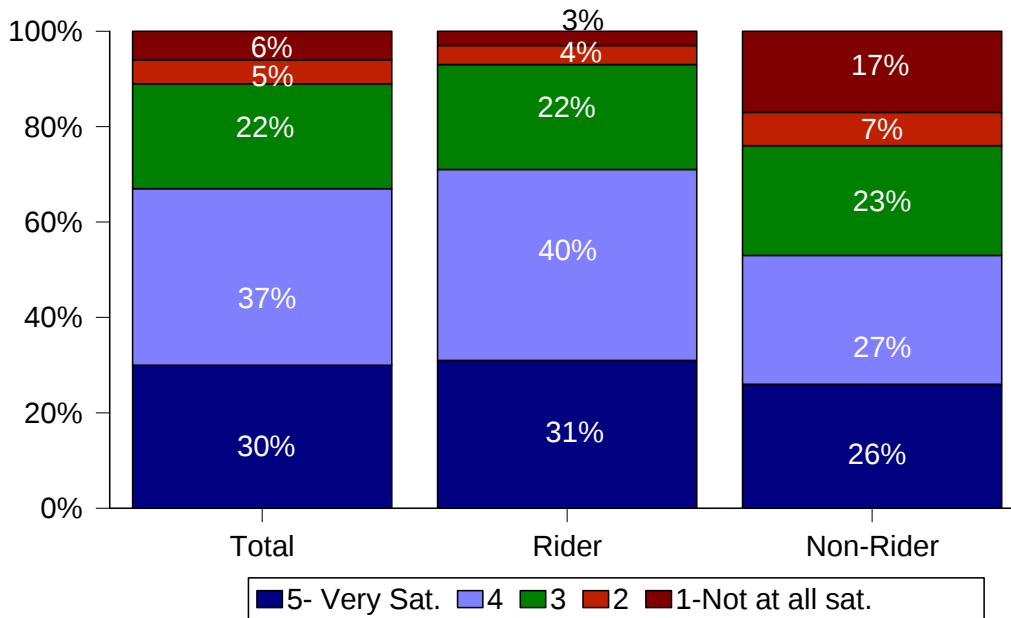
III. Overall Satisfaction and Improvement of Tempe's Transit System

A. Overall Satisfaction with Tempe Transit System

Two-thirds of residents indicate they are satisfied with the transit system in Tempe (67% give a “4” or “5” rating); up six point from 61% in 2008. As expected, satisfaction among transit riders is significantly higher compared to non-riders. **More than five in seven current riders (71%) report they are satisfied with the service and 53% of non-riders indicate they are satisfied.** Slightly more than one in ten residents (12%) declined to offer an opinion on their satisfaction with transit service; the majority of these residents are non-riders. Of interest, this is a significantly lower level of non-response measured than in 2008 when 21% did not rate the bus system.

Overall Satisfaction with Transit System

How satisfied are you with the quality of the transit system in Tempe?
(Among those with an opinion)



Total: n=377, Rider: n= 291, Non-Rider: n=86

Table 7: Overall Satisfaction with Transit System in Tempe
(Among those with an opinion)

Satisfaction	2010 (n=377)	2008 (n=333)
NET very + somewhat satisfied	66%	61%
5 – Very satisfied	29%	26%
4	37%	35%
3	22%	27%
2	5%	6%
1 – Very dissatisfied	6%	6%
Don't know (not included in %)	12%	21%

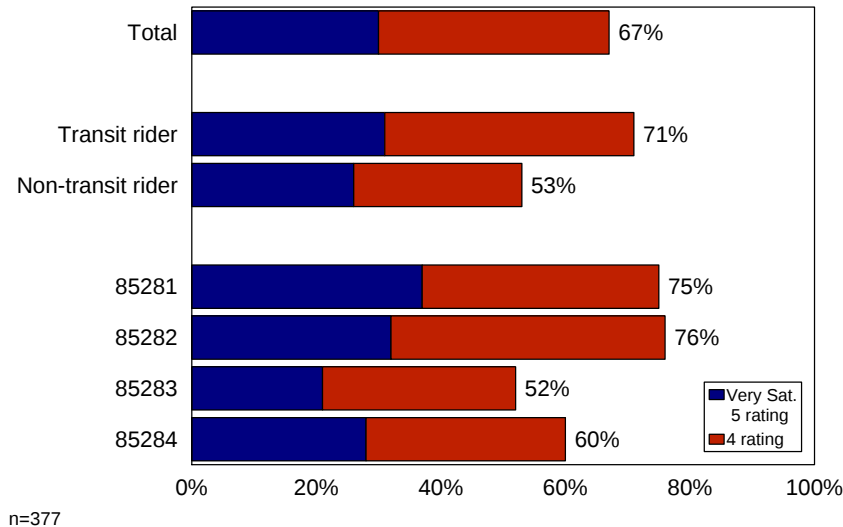
Q18. How satisfied are you with the quality of the transit system in Tempe?

In addition to differences between bus riders and non-riders, satisfaction ratings are significantly higher among residents living within the zip code 85281 (75%) and 85282 (76%)

Overall Satisfaction with Transit Service

Top Two (4+5) Ratings

(Among those with an opinion)



After residents were asked to indicate their level of satisfaction with the quality of transit service in Tempe, they were asked to explain the reason for their rating. These results are shown in Table 8.

Residents satisfied with the transit system (rating it a “4” or “5”) mention good service (26%), good routes (16%), and frequent, reliable service (16%) as the foremost reasons for their satisfaction level. In addition, approximately one in ten residents mention that they are satisfied with Tempe’s transit system because it is convenient (10%) and the buses are clean (8%). Although some residents indicated they are satisfied with the system, they still expressed a desire for more frequent buses with extended hours (14%) and more and better routes (13%).

Residents mention needing better and more routes (24%) and more frequent buses with extended hours (18%) as the two main reasons they gave the Tempe transit system low satisfaction ratings (rating it a “1”, “2”, or “3”). They also mention that buses take too long (7%) and that they would like light rail service to be expanded (6%).

Table 8: Reason for Satisfaction Level

Responses	Total (n=377)	Satisfaction Level	
		4,5 (n=252)	1,2,3 (n=125)
Positive			
Satisfied, good service	20%	26%	9%
Good routes, convenient routes	12%	16%	3%
Frequent, available, reliable	11%	16%	2%
Convenient (general)	7%	10%	2%
Buses are clean	6%	8%	1%
Easy to use	5%	7%	1%
Saves money, cheap, free	4%	6%	--
Provides transportation for people who need it/good for people without a car	3%	4%	2%
Drivers are friendly, helpful	3%	4%	2%
Like the light rail/light rail is good	2%	3%	1%
Reduces pollution	1%	2%	--
Do not have to park/helps with parking	1%	2%	--
Lots of options	1%	2%	--
Other (includes responses <1% of consensus)	2%	3%	1%
Neutral			
Don't use it, never used it	11%	8%	18%
Always room for improvement	2%	3%	1%
Average/ok	1%	1%	2%
Negative/Suggestions			
Need better routes, more routes, better connections, doesn't go where I need to	16%	13%	24%
More frequent buses, more hours	15%	14%	18%
Buses take too long, too slow	3%	2%	7%
Extend light rail/more routes for light rail	3%	1%	6%
Buses are too crowded, Orbit is crowded	2%	.4%	4%
Costs too much/too expensive	2%	2%	4%
Waste of money/tax money, no one uses it	2%	1%	5%
Not convenient	1%	.4%	2%
Bus stop is too far away from me	1%	.4%	1%
Drivers are rude, unprofessional	1%	1%	2%
Not effective/not that good	1%	.4%	2%
Don't like the people that ride bus	1%	1%	2%
Need more security for transit system	1%	2%	--
Other (includes responses <1% of consensus)	6%	4%	10%
Other Uncategorized (<1% of consensus)	7%	6%	7%
Don't know	4%	3%	8%

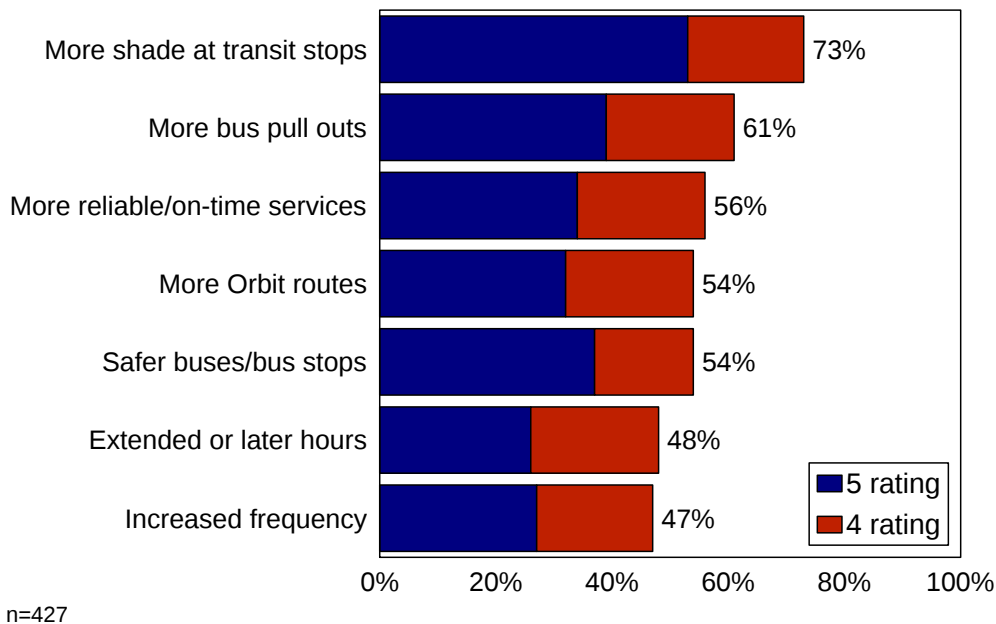
Q12a: Please explain your rating.

B. Priority of Possible Improvements to Tempe's Transit System

Residents were read a list of possible transit improvements for the City of Tempe and then asked to rate how high of a priority each improvement should be for the city on a one to five scale, with a "5" indicating it is a very high priority and a "1" indicating it is a very low priority. **Residents are most likely to identify providing more shade at bus stops as their top priority for the city (73%), followed by more bus pull outs (61%), and more reliable/on-time service (56%).**

Priority of Transit Improvements

Top Two (4+5) Ratings



As shown in Table 9A, residents were less likely to indicate that adding more neighborhood circulator or Orbit routes should be a high priority than in 2008 (54% down from 60%). They were also notably less likely to indicate that increased frequency should be a high priority for the city (47% down from 57%).

Table 9A: Priority of Possible Transit Improvements

Attribute	2010 Top Two (4+5) rating	2008 Top Two (4+5) rating	Very High Priority			Very Low Priority		Don't Know
			5	4	3	2	1	
More shade at transit stops*	73%	77%	53%	20%	15%	4%	5%	3%
More bus pull outs	61%	59%	39%	22%	20%	9%	7%	3%
More reliable and on-time*	56%	57%	34%	22%	21%	8%	7%	8%
More neighborhood circulator/Orbit routes	54%	60%	32%	22%	22%	7%	11%	6%
Safer buses and bus stops	54%	52%	37%	17%	19%	10%	11%	6%
Extended or later hours	48%	52%	26%	22%	28%	10%	10%	4%
Increased frequency*	47%	57%	27%	20%	27%	11%	9%	6%

Q13-19: Now I'm going to read you a list of possible transit improvements. Please indicate how high of a priority each improvement should be for the City of Tempe.

*Note: Attribute wording changed in 2010 to accommodate addition of light rail

As shown in Table 9B, women are more likely than men to indicate that providing more shade at transit stops should be a high priority for the city (78% vs. 68%), as well as improving the safety of buses and bus stops (62% vs. 44%). Of interest, non-riders are significantly more likely than transit riders to rate more bus pull outs (71% vs. 57%) and safer buses and bus stops (62% vs. 50%) as high priorities. Overall, residents living in the 85281 zip code area are more likely than those living elsewhere in Tempe to feel all of the improvements are a high priority.

**Table 9B: Priority of Possible Transit Improvements-Top Two Ratings
Demographic Breakdown**

	Top Two 2010 (n=427)	Gender		Transit Rider Status	
		Male (n=209)	Female (n=219)	Rider (n=304)	Non-Rider (n=123)
More shade at transit* stops	73%	68%	78%	73%	73%
More bus pull outs	61%	60%	62%	57%	71%
More reliable and on-time*	56%	52%	60%	56%	56%
More neighborhood circulator/Orbit routes	54%	49%	58%	52%	59%
Safer buses and bus stops	54%	44%	62%	50%	62%
Extended or later hours	48%	44%	52%	45%	54%
Increased frequency *	47%	46%	48%	47%	48%

Bold denotes statistical significance at the 95% confidence level.

Q13-19: Now I'm going to read you a list of possible transit improvements. Please indicate how high of a priority each improvement should be for the City of Tempe. *Note: Attribute wording changed in 2010 to accommodate addition of light rail

IV. Potential Use of Tempe's Transit System##

A. Reasons for Not Riding Transit

When non-riders were asked why they do not use public transit, approximately four in nine (45%) simply say they prefer their car (see Table 10 on the next page). This was also the top response and same percentage measured in 2008. This general preference is consistent across all demographic categories.

Most of the remaining reasons were related to convenience issues: takes too long (11%), bus does not go where they need to go (10%), bus stops are too far away (10%), and buses are not frequent enough (3%). An additional 8% feel public transit is generally inconvenient.

Three in ten non-riders indicate they do not have a need to ride public transit. Residents claim they do not have anywhere to go (10%), they do not go far distances (5%), and they simply do not need it (15% up significantly from 6% in 2008). Significantly fewer non-riders mentioned needing their car for business this year (5% vs. 13%).

Table 10: Reasons for Not Using Public Transit
(Among those who have not used public transit in the past year)

Reasons	2010 (n=123)	2008 (n=258)
Prefer car	45%	45%
Don't need to, don't have the need to use	15%	6%
Takes too long	11%	10%
Don't have anywhere to go	10%	8%
Bus stop far away	10%	7%
Doesn't go where they need to go	10%	14%
Inconvenient (general)	8%	12%
Health/disability	7%	4%
Need car for business	5%	13%
Don't have to go far distances	5%	6%
Don't know how to use bus	2%	5%
Not frequent enough	3%	4%
Don't like people on bus	2%	1%
Too hot/cold/rainy	2%	3%
Carpooling	-	3%
Bike	-	2%
Inconvenient bus schedule times	-	4%
Other	3%	9%
Don't know	2%	4%

*Q5: People tell us different reasons why they do not ride the bus. What are some of the reasons why you currently do not ride the bus? What other reasons? * Question changed in 2010 to: People tell us different reasons why they do not use public transit like riding the bus or light rail. What are some of the reasons why you currently do not use public transit? **Bold** denotes statistical significance at the 95% confidence level.*

B. Effectiveness of Persuasive Arguments

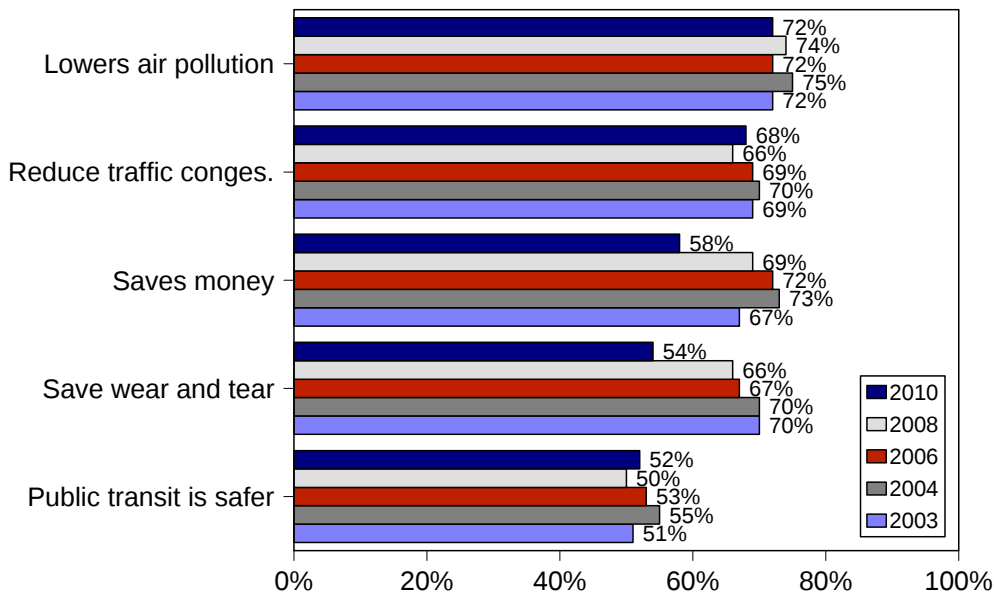
Residents were asked to rate the effectiveness of five arguments for motivating public transit usage. Ratings were completed on a four-point nominal scale (“very effective,” “somewhat effective,” “not very effective,” and “not at all effective”).

Overall, a majority of non-riders (52% to 72%) say all of the arguments presented were at least somewhat effective, however “lowers air pollution” and “reduces traffic congestion” rank as the two most persuasive benefits for convincing non-riders to use public transit (72% and 68% finding those statements to be “very” or “somewhat” effective).

While lowering air pollution has been viewed as the top argument since 2003, this is the first time reduced traffic congestion has been in the top two positions since 2003 when it last surpassed saving money. In fact, the percentage of non-riders rating “save money on gas and insurance” as “very” or “somewhat” effective dropped significantly this year (58% vs. 69% in 2008). There was a similar decline in the percentage of residents finding the argument of “saving wear and tear on your car” effective in comparison to 2008 (54% down from 66%). The safety of public transit continues to be the least persuasive argument for residents.

Persuasive Arguments

Very + Somewhat Effective



2003 n=415; 2004 n=405; 2006 n=407; 2008 n=424; 2010 n=427

Younger residents are most likely to rate using public transit saves money as an effective message to encourage transit usage. (73% 18 to 34 vs. 47% of those 55 and older), as well as saving wear and tear on your car (63% under 55 vs. 41% 55 and older).

Table 11: Effectiveness of Reasons to Persuade Transit Usage
(Among those who have not ridden a bus in the past year)

	2010 (n=123)	2008 (n=258)	2006* (n=289)	2004 (n=257)	2003 (n=255)	2010 Age		
						18-34 (n=30)	35-54 (n=35)	55+ (n=51)
Lower air pollution								
Effective**	72%	74%	72%	75%	72%	73%	83%	63%
Not effective***	24%	24%	23%	23%	25%	27%	14%	29%
Reduces traffic congest.								
Effective	68%	66%	69%	70%	69%	70%	71%	65%
Not effective	29%	33%	28%	27%	28%	30%	26%	29%
Save money on gas and insurance								
Effective	58%	69%	72%	73%	67%	73%	60%	47%
Not effective	41%	31%	24%	25%	29%	27%	37%	51%
Save wear/tear								
Effective	54%	66%	67%	70%	70%	63%	63%	41%
Not effective	44%	33%	29%	28%	25%	37%	29%	59%
Public Transit is safer								
Effective	52%	50%	53%	55%	51%	50%	54%	53%
Not effective	43%	46%	40%	40%	42%	47%	37%	43%

Q6: 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. Question changed in 2010 to: For each of the following benefits to using public transit, please indicate how effective it would be in persuading you to ride the bus or light rail 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

Bold denotes statistical significance at the 95% confidence level.

V. Tempe In Motion (TIM)

A. Awareness of Tempe in Motion

Awareness of Tempe in Motion (TIM) reached its highest level ever reported with more than one-half (54%) of residents aware of it. While this does not represent a statistically significant increase over 2008 at the 95% level of confidence; it is significant at the 90% confidence level. Unaided awareness reached its second highest level to date with 24% naming Tempe's transit program voluntarily (down slightly from the high of 27% measured in 2008). An additional 30% recognized the name "TIM" this year.

Those most likely to be aware of TIM are residents under the age of 55 (61% vs. 40% for those 55+) and current bus riders (60% vs. 39% for non-riders). In addition, seven in 10 residents aware of TIM (69%) were able to correctly identify the meaning of "TIM" as Tempe in Motion (this is down five points from 2008).

Table 12: Awareness of TIM

	2010 (n=427)	2008 (n=424)	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)
Total Awareness (Unaided + Aided)	54%	48%	38%	51%	39%	38%
Unaided Awareness	24%	27%	18%	22%	8%	12%
Aided Awareness	30%	21%	21%	29%	31%	26%
Meaning of TIM	(n=230)	(n=202)	(n=155)	(n=205)	(n=152)	(n=154)
"Tempe in Motion"	69%	74%	67%	72%	57%	55%
Other	4%	6%	6%	2%	1%	9%
Don't know	27%	20%	28%	27%	43%	36%

Q21/22: What is the name of Tempe's transit/transportation program? Have you ever heard of TIM? Q22a IF YES: To the best of your knowledge, what does TIM mean or stand for?

*2006 data weighted

#

B. Source of Awareness

Residents who are aware of TIM are most likely to indicate they became aware through signs on the buses and street banners (mentioned by 18% and 17%, respectively), similar to previous years' findings (each mentioned by 20% in 2008). Other top sources include television (9%), signs (9%), print ads (6%), and flyers (6%).

Table 13: Source of TIM Awareness
(Among those aware of TIM)

Responses	2010 (n=230)	2008 (n=202)	2006* (n=155)	2004 (n=205)	2003 (n=152)	2001 (n=154)
Signs on the buses	18%	20%	20%	12%	16%	18%
Street banner	17%	20%	19%	28%	24%	21%
TV	9%	10%	19%	16%	10%	23%
Signs (general)	9%	4%	1%	1%	3%	-
Print ads	6%	7%	15%	12%	16%	19%
Flyers	6%	4%	-	-	-	-
Direct mail	5%	2%	4%	5%	9%	6%
Driving around	5%	2%	2%	-	-	-
Internet	4%	3%	4%	2%	1%	2%
Library	4%	-	3%	3%	3%	-
Word of mouth	3%	4%	3%	3%	4%	3%
School/ASU	3%	3%	2%	-	-	-
Bus stop	2%	1%	-	-	-	-
Bill inserts	2%	2%	3%	2%	4%	2%
Bus book	2%	-	1%	1%	2%	-
At work	1%	1%	3%	-	-	3%
Radio	-	-	3%	1%	1%	7%
Other **	6%	2%	8%	3%	3%	4%
Don't know	12%	14%	14%	20%	16%	13%

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

*2006 data weighted

** Other indicates a less than 1% consensus

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C. Messaging

For those who indicate they heard about TIM via advertising (i.e., TV, newspaper, print ads, online ads, and/or direct mail pieces) nearly one in seven residents recall the general name “TIM” from the advertising (15%) and/or the general promotion of using alternate modes (15%; see Table 14) or specifically riding the bus (6%), bike (3%) or light rail (2%). Others mention hearing a message that promoted using transit because is good for the environment (7%), along with being easy to use (3%) and saving money (2%).

In addition, specific themes and tag lines were remembered from the ads - ads with a former rock star (6%), messages that it is “cool” to ride the bus (3%), and the tagline “live, work, play” (1%).

Table 14: TIM Advertising Message
(Among those aware of TIM advertising via TV, newspaper, print ads, online ads or through direct mail)

Responses	2010 (n=79)	2008 (n=120)	2006* (n=89)	2004 (n=110)	2003 (n=78)	2001 (n=93)
"TIM" – Tempe in Motion	15%	18%	8%	-	21%	12%
Promotion of using alternate modes	15%	10%	4%	6%	9%	11%
Riding the bus/bike/transit good for environment	7%	-	7%	15%	-	-
The former rock star/band member	6%	8%	-	-	-	-
Encourage people to take the bus	6%	7%	6%	-	5%	13%
Route information	4%	2%	-	-	-	-
Riding the bus/bike is easy	3%	3%	4%	10%	-	-
Encouraged people to take light rail	2%	-	-	-	-	-
It's free	2%	-	-	-	-	-
Updates about transportation	2%	-	-	-	-	-
It's cool to ride the bus	2%	-	-	-	-	-
Riding bus/transit saves you money	1%	2%	8%	7%	-	-
"Live, work, play"	1%	2%	-	-	-	-
Saves time/fast	1%	-	4%	-	-	-
Remember logo	-	2%	3%	2%	-	-
Ad about Orbit service	-	2%	-	-	-	-
Aisles and windows for everyone slogan	-	2%	-	-	-	-
Riding bus saves gas	-	-	4%	-	-	-
"Leave the driving to us"	-	-	2%	-	-	-
Cut down on traffic	-	-	3%	-	-	-
Riding the bus is convenient	-	-	2%	-	-	-
Other**	14%	14%	19%	7%	5%	8%
Don't know	33%	42%	44%	59%	47%	47%

Q24: What messages do you recall from the advertising?

*2006 data weighted

** Other indicates less than 1% consensus

D. Advertising Effect on Perception of Tempe Transportation Options

Almost three in five residents aware of TIM advertising (58%) indicate that it had a positive effect on their perceptions of the transit system in Tempe, similar to 2008.

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Table 15: Advertising Affect on Perception
(Among those Aware of TIM advertising)

	2010 (n=79)	2008 (n=120)	2006* (n=89)	2004 (n=110)	2003 (n=78)	2001 (n=93)
Make you think more positively about transportation options in Tempe	58%	57%	52%	53%	44%	54%
Have no effect on your perceptions	38%	42%	43%	44%	46%	45%
Make you think negatively about transportation options in Tempe	1%	1%	4%	-	-	-
Don't know	3%	--	1%	4%	10%	1%

*Q24a: How did the advertising affect your perception of the transportation system in Tempe? **
Question changed in 2008 from "bus system" to "transportation".

**2006 data weighted*

VI. Tempe Neighborhood Circulator Bus Program Awareness

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More than half of Tempe residents (52%) report being aware of the city's neighborhood circulator bus program; this percentage is comparable to 2008 levels yet more than twice the number of residents who reported being aware of the circulator program in 2006 (25%).

College grads (59%), current bus riders (58%) and those with an 85281 or 85282 zip code (59% and 65%, respectively) are the most likely to report familiarity. Among those aware of the neighborhood circulator, 80% were able to correctly identify the name of the bus as "Orbit." This percentage was higher among those under 55 years of age (88%) and transit users (84%)

Table 16: Tempe Neighborhood Circulator Bus

	2010 (n=427)	2008 (n=424)	2006* (n=407)
Aware of TNCB	52%	54%	25%
Name of TNCB	(n=222)	(n=227)	n/a
Orbit	80%	82%	n/a
Flash	2%	3%	n/a
Other	2%	2%	n/a
Don't know	16%	13%	n/a

*Q.25/25a: Are you aware of Tempe's free Neighborhood Circulator program service? If YES: What is the name of Tempe's free Neighborhood Circulator system? *2006 data weighted*

VII. Tempe Bicycling and Walking#

A. Bicycle Usage

The percentage of residents surveyed who report having access to a bicycle increased slightly this year to 58% from 56% in 2008 and 53% in 2006 and mirrors percentages reported in previous years.

Residents with some college and college degrees are more likely to report having access to a bike than those with high school diplomas (57% for college graduates, 63% for some college vs. 37% for high school). Additionally, those under 55 years of age are more likely to report having access to a bike (66% vs. 44%).

Among those who have a bike, **almost two thirds (66%) report they ride their bike at least once a month. This is down from the record high monthly frequency levels recorded in 2008 (71%).** As in previous years, approximately one-fourth of the bike riders say they ride their bikes at least ten times each month (24%).

Those most likely to report they ride their bike frequently (10+ times or more a month) are:

- Current transit riders (28% vs. 10% for non-current transit riders)
- Those earning <40K (32% vs. 17% for those earning \$40K-\$60K and 23% for those earning >\$80K)
- Residents living in the 85281 zip code (42% vs. 21% living in other zip codes)

Table 17A: Access to and Frequency of Bike Use

	2010 (n=427)	2008 (n=424)	2006* (n=407)	2004 (n=405)	2003 (n=415)	2001 (n=404)
Have access to bike	58%	56%	53%	57%	56%	58%
Frequency						
Never/occasionally	35%	29%	32%	32%	36%	33%
Once or twice	17%	19%	19%	21%	18%	13%
Three to five times	13%	19%	14%	12%	14%	17%
Six to ten times	9%	10%	8%	6%	8%	8%
10+ times	24%	23%	25%	25%	21%	27%
Don't know/not sure	2%	--	2%	3%	3%	2%

Q26/Q27: 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

As mentioned, residents earning \$40K or more annually have access to a bicycle more often than those earning <\$40K (64% for \$40 - \$80K earners, 67% for >\$80K earners vs. 46%). However, those who earn <\$40K ride their bike more frequently than those earning \$40K-\$80K and >\$80K (32% vs. 17% and 23%).

Table 17B: Access to and Frequency of Bike Use

	2010 (n=427)	Income		
		<\$40K (n=47)	\$40K- \$80K (n=84)	>\$80K (n=83)
Have access to bike	58%	46%	64%	67%
Frequency				
Never/occasionally	35%	38%	27%	40%
Once or twice	17%	13%	25%	12%
Three to five times	13%	11%	14%	12%
Six to ten times	9%	4%	12%	12%
10+ times	24%	32%	17%	23%
Don't Know	2%	2%	5%	1%

Q26/Q27: 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.) **Bold** denotes statistical significance at the 95% confidence level.

Those who have a bike, but only ride it occasionally were asked why this was the case (n=86). **More than one third of these occasional bike riders (36%) claim the Arizona heat is the main reason they do not ride their bike more often.** This represents an increase in mentions from 2008 (26%). Approximately one in ten bike riders (9%) indicate they are unable to ride because of a health condition. Other common reasons include their being “too old” (8%), not owning a bike/bike broken (7%), too dangerous (6%), time/convenience (6%), too lazy (6%), rather drive car (6%) and have kids to drive (6%).

B. Bicycle Travel Patterns

As found in previous studies, bicycles continue to reportedly be ridden for exercise (60%). Additional destinations for bike riders include work and school (24%) and the store (16%); these have consistently been the top destinations over the years. Slightly more reported riding their bike to Tempe Town Lake than in 2008 (7% vs. 4%).

Individuals over 55 (70% vs. 53% for those 55 and under) are most likely to report that they ride their bike for exercise purposes, whereas younger riders are more likely to report they ride their bike to work or school (29% vs. 9%). Single residents are also more likely to report riding their bike to work/school (37% vs. 16%) as are those earning <\$40K annually (43% vs. 19%).

Table 18: Bike Riding Destinations

(Among those who have access to a bicycle and ride it at least 1X a month)

Responses	2010 (n=155)	2008 (n=169)	2006* (n=142)	2004 (n=157)	2003 (n=142)	2001 (n=404)
Exercise	60%	56%	59%	58%	59%	64%
Work/school	24%	25%	24%	29%	30%	32%
Store	16%	19%	14%	22%	12%	14%
Tempe Town Lake	7%	4%	1%	1%	1%	-
Parks	4%	6%	8%	4%	6%	8%
Friend's house	3%	6%	2%	4%	4%	5%
ASU/Library	3%	6%	1%	2%	1%	1%
Mill Avenue/ Downtown Tempe	3%	1%	2%	2%	2%	-
Run errands	1%	2%	5%	-	2%	-
Restaurant/dinner	1%	2%				
Downtown (general)	1%	1%	3%	-	-	-
Anywhere/Everywhere	1%	1%	3%	-	1%	-
South Mountain	1%	1%				
Other	4%	5%	3%	2%	1%	3%
Don't know/not sure	-	2%	-	3%	-	2%

Q27b: Where do you go when you ride your bike?

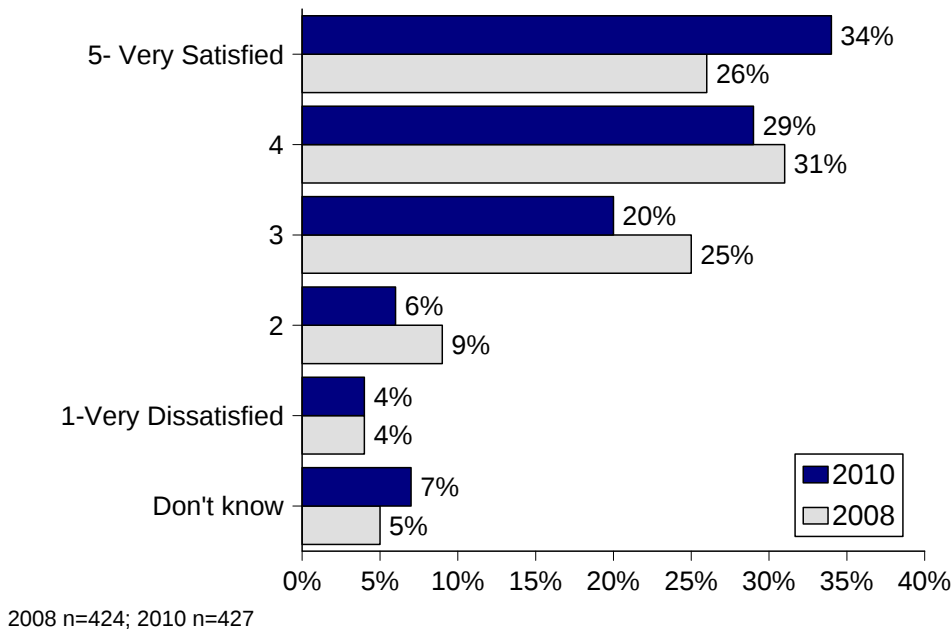
*2006 data weighted

C. Overall Satisfaction with Bicycle and Pedestrian Paths

Nearly two-thirds of residents indicate they are satisfied with the quality of the walking and biking paths in Tempe (63% give a “4” or “5” rating). This is up from the 57% reported in 2008. Satisfaction is higher among those living in the 85283/85284 zip codes than those living in the 85281/85282 zip codes (71% vs. 57% giving a “4” or “5” rating).

Overall Satisfaction with Walking and Bike Paths in Tempe

How satisfied are you with the quality of the walking and biking paths in Tempe?



After residents were asked how satisfied they were with the quality of Tempe’s biking and walking paths, they were asked to explain the reason for their rating. The majority of residents (n=397) gave the reason for their rating.

One in five residents (20%) who report they are satisfied with the biking and walking paths indicate there are no problems with the paths and that they are fine the way they are. An additional 16% indicate there are plenty of paths throughout Tempe. Those satisfied with the paths also mention that they are safe (11%) and well lit (7%). Mentions for both of these reasons increased from 2008 (11%, up from 5% in 2008 for safe and 7%, up from 1% in 2008).

With over one in ten mentions, safety is a top concern of residents (11%). Increasing the number of bike paths (9%) is the second most frequently mentioned reason for low satisfaction ratings. Never using the paths and therefore having no knowledge of them is the top reason for providing a neutral rating by residents (5%).

Table 19: Reasons for Satisfaction Rating
(Among those with an opinion)

Responses	2010 (n=397)	2008 (n=402)
Positive		
They are fine the way they are, no problems	20%	24%
They are everywhere, there are plenty of paths	16%	13%
They are safe	11%	5%
Paths are well lit	7%	1%
They are properly maintained, well landscaped	6%	3%
Easy to use, accessible	4%	5%
Paths are wide enough, have enough room	4%	4%
Have good routes, connect well	4%	-
Neutral		
I never use them, I have no knowledge of them	5%	8%
There is always room for improvement	2%	4%
Not satisfied nor dissatisfied	-	1%
Negative/Suggestions		
They don't seem safe enough, make them safer	11%	10%
We could use more of them/ walking and bike paths	9%	5%
Need more bike lanes	7%	14%
Paths need to be wider	3%	3%
Need better markings on paths	3%	2%
They are not maintained	2%	4%
Bicyclists interfere with drivers	2%	2%
Need better illumination	2%	1%
Some routes are disconnected/end abruptly	2%	2%
Not enough shade	1%	2%
Need more walking paths, don't see a lot	1%	2%
Difficult to cross at intersections	-	1%
Other (includes responses <1% of consensus)	4%	6%
Don't know	5%	6%

Q28a: Please explain your rating.

D. Priority of Possible Bicycle and Pedestrian Improvements

When residents were given a list of possible improvements for the biking and walking paths in Tempe and then asked to indicate how high of a priority each improvement should be for the City of Tempe, residents are most likely to indicate that making the paths safer should be the top priority (70% give is a “4” or “5” rating). Residents report the next two priorities should be adding more paths (60%) and adding more amenities, like water fountains and lighting (57%). Residents are least likely to indicate that creating more shade on the paths should be a high priority for the city (54%). In general, residents were less likely than in 2008 to indicate any of the improvements should be a high priority (see Table 20).

Females are more likely than males to indicate all improvements as a high priority for the city: safety on the paths (80% vs. 59%), adding more bike and pedestrian paths (67% vs. 53%), adding more amenities (68% vs. 46%) and providing more shade on the paths (64% vs. 44%).

High school graduates and Tempe residents who have completed some college place a higher priority than college graduates on making bike paths safer (84% and 77% vs. 64% for college graduates) and adding more amenities (69% and 64% vs. 51% for college graduates).

Priority of Bike and Pedestrian Improvements

Top Two (4+5) Ratings

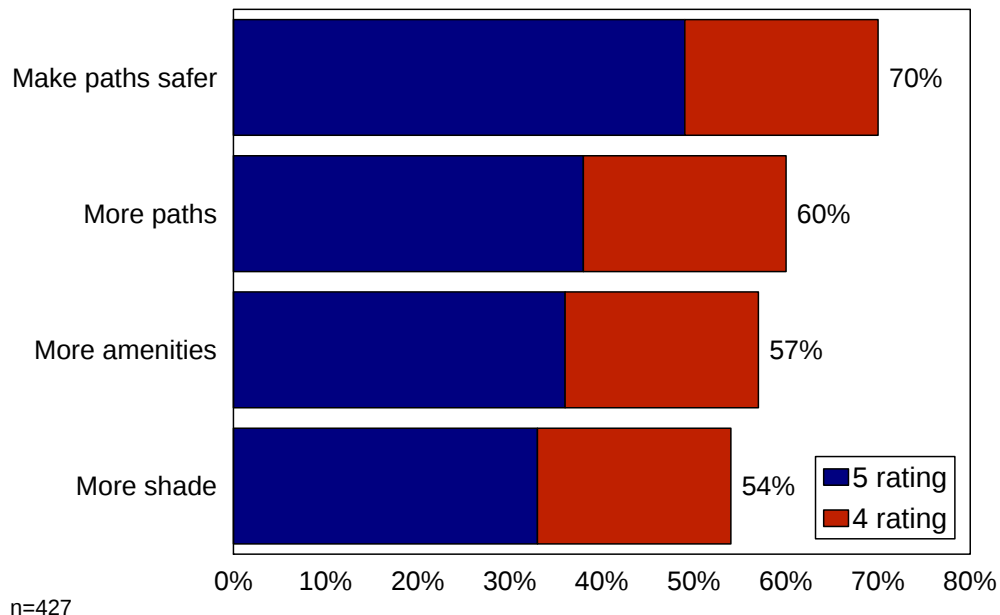


Table 20: Priority of Possible Bicycle and Pedestrian Improvements

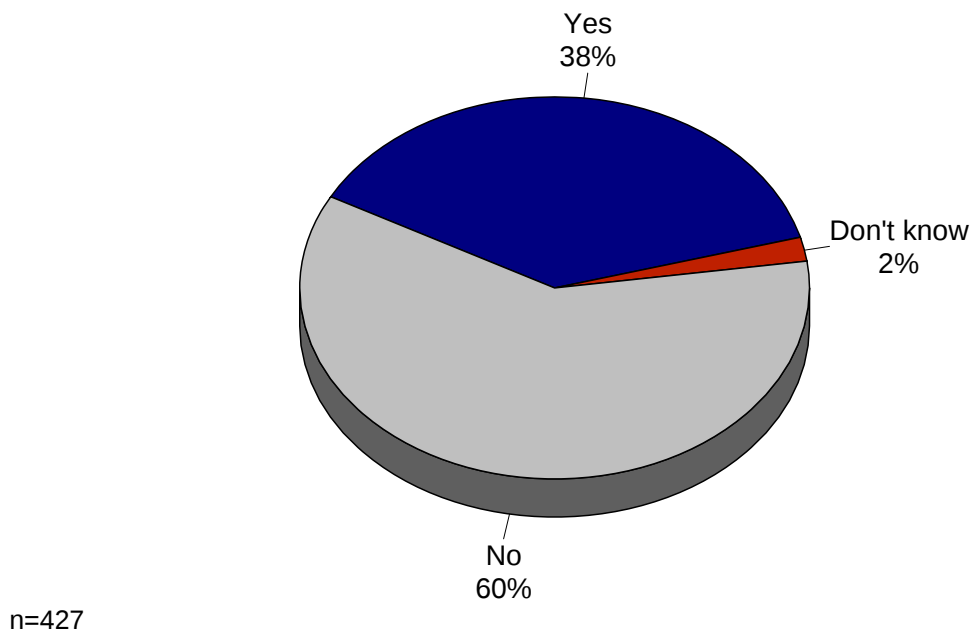
Attribute	2010 Top Two (4+5) rating	2008 Top Two (4+5) rating	Very High Priority		Very Low Priority			Don't Know
			5	4	3	2	1	
Make paths safer	70%	72%	49%	21%	17%	7%	6%	-
Add more bike and pedestrian paths	60%	65%	38%	22%	25%	7%	8%	-
More amenities for bikes and pedestrians along the paths such as water fountains and lighting	57%	63%	36%	36%	26%	11%	6%	-
More shade along paths	54%	57%	33%	33%	26%	11%	8%	1

Q29-32: Now I'm going to read you a list of possible bicycle and pedestrian improvements. Please indicate how high of a priority each improvement should be for the City of Tempe.

VIII. Tempe Youth Free Transit Pass Program

Nearly two in five Tempe residents (38%) indicate they have heard of the Tempe Youth Free Transit Pass. Those aged 35 to 54 are more likely to be aware of the program than their younger and older counterparts (46% vs. 33% for 18-34 and 35% for 55+). Not surprisingly, those who have lived in Tempe for 6 years or more have higher awareness rates for the program (27% for 3-5 years, 43% for 6-10 years and 39% for more than 20 years).

Awareness of Tempe Youth Free Transit Pass



Word of mouth and the local schools continue to be the top two most commonly cited sources of information for those who are familiar with the Tempe Youth Transit Pass program (27% and 21%). The number of mentions for these two sources decreased this year (compared to 33% and 29% mentioned in 2008) and returned to levels recorded in 2006.

Males are more likely than females to hear about the program through word of mouth (36% vs. 20% women), while females are more likely than males to hear about the program through the library (13% vs. 3% for men).

Respondents between the ages of 18 and 34 are more likely to have heard of the program from a letter received from the city than their older counterparts (11% vs. 0% for 35-54 year olds and 2% for 55+).

Table 21: Sources for Tempe Youth Transit Pass Program Information
(Among those aware of the program)

Sources	2010 (n=164)	2008 (n=46)	2006* (n=33)
Word of mouth (friends/family)	27%	33%	27%
Through school	21%	29%	21%
Library	8%	7%	12%
Newspaper	7%	-	-
Letter from the City	6%	4%	6%
Bill insert	4%	2%	-
Advertisement	3%	-	5%
Bus Book	2%	4%	8%
Employer/Work	2%	-	10%
Web site	1%	4%	3%
Tempe Sister Cities	-	2%	-
Other	4%	4%	5%
Don't know	6%	11%	3%

QD6a: How did you first hear about the Tempe Youth Free Transit Pass Program?

*2006 data weighted

APPENDIX A:**City of Tempe – Tempe in Motion
Questionnaire – September 2010**

Sample: 85281, 85282, 85283, 85284 = 400

Quotas: Males/Females 50/50 each quota group

*Age distribution will be monitored for representativeness of sample
English and Spanish*

Good _____, could I please speak with _____? This is _____ calling from WestGroup Research on behalf the City of Tempe Transportation Division. We are conducting a survey with Tempe residents about important issues affecting the City's transportation system. This is not a telemarketing call; we simply want your opinions on a variety of issues important to Tempe residents.

1. Are you a Tempe resident?
Yes – CONTINUE
No – THANK AND TERMINATE
2. What is your zip code?
 - a. 85281
 - b. 85282
 - c. 85283
 - d. 85284
 - e. Other/DK/Refused – THANK AND TERMINATE
3. How long have you lived in Tempe?
 - a. Less than one year
 - b. One to two years
 - c. Three to five years
 - d. Six to ten years
 - e. Eleven to 20 years
 - f. More than 20 years
 - g. Refused/DK/NA
4. How many times have you ridden on a city bus (including Orbit, Flash and local bus) in Tempe in the past year?
 - a. One to five times
 - b. Six to ten times
 - c. Eleven to 20 times
 - d. More than 20 times
 - e. NONE
 - f. DK/NA
- 4b. How many times have you ridden METRO light in Tempe in the past year?
 - a. One to five times –
 - b. Six to ten times –
 - c. Eleven to 20 times –
 - d. More than 20 times –
 - e. NONE
 - f. DK/NA

5. *ASK IF NONE IN BOTH 4 and 4A: People tell us different reasons why they do not use public transit like riding the bus or light rail. What are some of the reasons why you currently do not use public transit? What other reasons? DO NOT READ LIST (Multiple responses allowed)*
- a. I prefer to drive my car
 - b. I don't know how to use the transit system
 - c. The stops are too far away
 - d. I don't like the type of people who take transit
 - e. Using public transit takes too long
 - f. Service isn't frequent enough
 - g. Transit is not safe
 - h. Stops are not safe
 - i. I need my car for business
 - j. Public transit is dirty
 - k. Other: Specify _____
 - l. Don't know
6. *ASK IF NONE IN BOTH 4 and 4A: For each of the following benefits to using public transit, please indicate how effective it would be in persuading you to ride the bus or light rail instead of using your current mode of transportation. Would it be very effective, somewhat effective, not very effective, or not at all effective? (ROTATE ORDER)*
- a. Save wear and tear on your car
 - b. Save money on gas and insurance
 - c. Lowers the pollution in the air
 - d. Using transit is safer than driving
 - e. Using transit reduces congestion on the streets

IF BUS OR LIGHT RAIL RIDER: ALL OTHERS SKIP TO Q12

7. How long have you been using the transit system in Tempe? DO NOT READ LIST
- a. Less than a year
 - b. 1 to 2 years
 - c. 2 to 4 years
 - d. 4 to 6 years
 - e. More than 6 years
 - f. DK/NA
8. What is the main reason you use public transit? (DO NOT READ LIST)
- a. convenient
 - b. don't have a car
 - c. don't have a driver's license
 - d. enjoy the people
 - e. protects the environment
 - f. saves money
 - g. saves wear and tear on my car
 - h. Other (SPECIFY: _____)
9. Where do you go when you use public transit ? (DO NOT READ LIST. Multiple responses allowed)
- a. ASU
 - b. Community College
 - c. High School
 - d. work

- e. shopping
- f. errands
- g. medical appointment
- h. visit friends/family
- i. recreational activities
- j. Library
- k. Other (SPECIFY:_____)

10. *ASK ONLY OF BUS RIDERS Q4 a-d In general, how satisfied are you with: ROTATE LIST*

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	DK/ no answer
a. Cleanliness of the bus	4	3	2	1	0
b. Reliability/on-time performance of buses	4	3	2	1	0
c. Driver courtesy and professionalism	4	3	2	1	0
d. Route frequency	4	3	2	1	0
e. Comfort on the bus	4	3	2	1	0
f. Ease of using the bus	4	3	2	1	0
g. Safety on the bus	4	3	2	1	0

11. How likely are you to use public transit one year from now? Please use a 1 to 5 scale where a 1 means not at all likely and 5 means very likely.

ASK ALL:

12. How satisfied are you with the quality of the transit system in Tempe? Please rate your satisfaction level on a 1 to 5 scale where 5 means "very satisfied" and "1" means "very dissatisfied"

12a. Please explain your rating.

- 13-19. Now I am going to read you a list of possible transit improvements. Please indicate how high of a priority each improvement should be for the City of Tempe. Please use a 1 to 5 scale where "1" means "a very low priority" and a "5" means it should be a "very high priority" for the City of Tempe. The first one is....

RANDOM ORDER 19-25	Very high priority				Very low priority	DK / Refused
13. Increased frequency	5	4	3	2	1	6
14. Extended or later hours	5	4	3	2	1	6
15. Safer buses and bus stops	5	4	3	2	1	6
16. More shade at transit stops	5	4	3	2	1	6
17. More reliable and on-time services	5	4	3	2	1	6
18. More neighborhood circulator/Orbit routes	5	4	3	2	1	6
19. More bus pull outs	5	4	3	2	1	6

20. Question deleted for 2010 interviewing
21. What is the name of Tempe's transit/transportation program? DO NOT READ LIST
- a. TIM (or Tempe in Motion) – SKIP TO Q22a
 - b. Valley Metro – ASK Q22
 - c. Orbit – ASK Q22
 - d. Other (SPECIFY: _____) – ASK Q22
 - d. DK ASK Q22
22. Have you ever heard of TIM? a. YES b. NO (IF NO SKIP TO Q25)
- 22a. *IF YES in Q22 or "TIM" IN Q21: To the best of your knowledge, what does TIM mean or stand for? DO NOT READ LIST*
- a. Tempe In Motion
 - b. Other (SPECIFY: _____)
 - c. Don't know
23. IF YES in Q22 or "TIM" IN Q21: How did you hear about it?
- a. TV
 - b. Newspaper ads
 - c. online ads/web
 - d. Direct mail
 - e. Street Banners
 - f. Don't know/Not aware of the program
 - g. Other (SPECIFY: _____)
24. IF a, b, c, d, or e in Q23: What messages do you recall from the advertising? (SPECIFY: _____)
- 24a. *IF a, b, c, d or e in Q23: How did the messages affect your perception of the transportation system in Tempe? Did it. READ LIST*
- a. Make you think more positively about transportation options in Tempe
 - b. Have no effect on your perceptions
 - c. Make you think negatively about transportation options in Tempe
 - d. DON'T READ – Don't know

ASK ALL:

25. Are you aware of Tempe's free Neighborhood Circulator program service? Yes/No/DK
- 25a. *If yes in Q25: what is the name of Tempe's free Neighborhood Circulator system? DO NOT READ LIST*
- a. Orbit
 - b. Flash
 - c. TIM (or Tempe in Motion)
 - d. Other (SPECIFY: _____)
 - e. DK
26. Do you have access to a bicycle that you can ride when you want to?
- a. Yes
 - b. No – SKIP TO Q28

27. IF YES IN Q26: How many times in a month do you ride your bike?
- a. None/never ride it/only ride it occasionally
 - b. Once or twice
 - c. Three to five times
 - d. Six to 10 times
 - e. More than 10 times
 - f. DK/NA
- 27a. *If none/never ride it in Q27: What are some reasons why don't you ride your bike more often? (DO NOT READ LIST)*
- a. takes too long
 - b. Have too much to carry
 - c. too hot
 - d. not enough bike lanes/paths
 - e. too much traffic
 - f. too dangerous
 - g. Other (SPECIFY: _____)
 - h. DK/NA
- 27b. IF RIDE BIKE 1+ times in Q27: Where do you go when you ride your bike?
- a. work/school
 - b. store
 - c. friend's house
 - d. no where/just riding for exercise
 - e. Other (SPECIFY: _____)

ASK ALL:

28. How satisfied are you with the quality of the walking and biking paths in Tempe? Please rate your satisfaction level on a 1 to 5 scale where 5 means "very satisfied" and "1" means "very dissatisfied"
- 28a. Please explain your rating.
- 29-32. Now I am going to read you a list of possible bicycle and pedestrian improvements. Please indicate how high of a priority each improvement should be for the City of Tempe. Please use a 1 to 5 scale where "1" means "a very low priority" and a "5" means it should be a "very high priority" for the City of Tempe. The first one is....

RANDOM ORDER 29-32	Very high priority				Very low priority	DK / Refused
29. Add more bike and pedestrian paths	5	4	3	2	1	6
30. Make paths safer	5	4	3	2	1	6
31. More amenities for bikes and pedestrians along the paths such as water fountains and lighting	5	4	3	2	1	6
32. More shade along paths	5	4	3	2	1	6

Demographics

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

- D1. Gender: 1 Male 2 Female
- D2. What is your age: _____
- D3. What is the highest grade of school or year of college that you have completed:
- a. Some high school
 - b. High school graduate
 - c. Some college
 - d. College graduate
 - e. Post graduate
 - f. No answer
- D4. Was your annual household income before taxes last year:
- a. Less than \$20,000
 - b. \$20,000 to \$40,000
 - c. \$40,000 to \$60,000
 - d. \$60,000 to \$80,000
 - e. \$80,000 to \$100,000
 - f. More than \$100,000
 - g. No answer
- D5. Are you married or single?
- a. Married
 - b. Single
 - c. No answer
- D6. Have you ever heard of the Tempe Youth Free Transit Pass Program? Yes/No/DK
- D6a. IF YES IN D6: How did you first hear about the Tempe Youth Free Transit Pass Program? DO NOT READ LIST. SINGLE RESPONSE
- a. Through the school
 - b. Received a letter from the city
 - c. Advertisement
 - d. Web site
 - e. Other: SPECIFY
 - f. Don't know/Don't recall
- D7. Are you employed full-time, employed part-time, retired, a housewife, a student or unemployed?
- a. Full-time
 - b. Part-time
 - c. Retired
 - d. Housewife
 - e. Student
 - f. Unemployed
 - g. Refused/NA

Thanks for your time. That concludes our interview.

