



Valley Metro Ridership Recovery 2021 Topline Report

Summary of Findings

Research Objectives

Research Goal:

Valley Metro commissioned WestGroup Research to conduct an online survey of Metro-Phoenix residents who have used public transit in the past and compare the results from the 2021 survey to the survey completed by this same target group in June of 2020.

Research Objectives:

The purpose of the survey to provide continuing insights into the impact of the Covid-19 pandemic on perceptions of public transit overall, personal use of public transit, and what can be done to encourage riders to return to pre-Covid usage levels.

Research Methodology

Target Audience:

- Current Transit Users (used transit since March 2020 – the start of COVID-19)
- Former Transit Users (used transit prior to March 2020, but not since)
- Transit Independent / Transit Dependent Riders (definition on next slide)

Source:

In addition to the WGR database of current/former transit users and Valley Metro’s internal database of riders, WGR also completed intercept surveys with riders at several transit centers to boost the number of responses from current riders.

Intercept Location	Total n=208
Tempe Transportation Center	17%
79 th Ave Park and Ride	16%
Superstition Springs Transit Center	15%
19 th Ave and Montebello	14%
Gilbert and Main St	13%
Arrowhead Transit Center	13%
Dunlap and 19 th Ave	12%

Participant Source	Total n=2163
WestGroup Database	51%
Email from Valley Metro	21%
Transit Center In-person Intercepts	10%
Valley Metro’s social media	5%
Valley Metro’s website	3%
VM business card	3%
On board buses	1%
Alert VM	<1%
RAPID Bus Stop	<1%
Other	4%

Research Methodology

Methodology: Quantitative

An online survey with 2163 participants in total: 1481 Transit Independent Riders, 664 Transit Dependent Riders, 18 Non-grouped participants. The responses were collected between April 19 and May 24, 2021.

The Ridership Recovery study used an opt-in approach to recruit participants for the survey – invitations either came from WestGroup, Valley Metro, or invitations to participate were posted to social media by both of these organizations as well as various Valley Metro partners. In addition, WGR conducted in-person intercept interviews at several transit centers and WGR/VM staff also handed out business card invitations with a QR code to passengers as they boarded transit vehicles.

The goal was to encourage response from as many riders/former riders as possible, understanding that the responses would not necessarily mirror the overall demographic attributes of Valley Metro ridership overall.

Research Methodology

Analysis:

The data, when applicable, will be broken down by Transit Independent and Dependent Riders. This breakdown is defined by the number of vehicles owned and the possession of a driver's license.

- Transit Independent Riders: Have a driver's license AND own at least one vehicle in HH
- Transit Dependent Riders: Do not have driver's license OR have zero vehicles in HH

Demographics, Residence, Vehicle Access and Employment Characteristics



Demographics Summary – 2021 vs. 2020

As was true in 2020, more than one-half of participants were Female and two-thirds of the participants reported to be White. Overall, participant demographics were similar to those reported last year with the exception of slightly more participants with incomes over \$75,000 in 2021 compared to 2020.

Demographics	2021 Total n=2163	2020 Total n=1401	Demographics	2021 Total n=2163	2020 Total n=1401
Gender			Age		
Female	56%	55%	18-34	22%	24%
Male	42%	43%	35-54	40%	41%
Other	2%	2%	55 or older	36%	33%
Ethnicity			Annual Household Income		
White	66%	67%	Under \$30,000	26%	30%
Hispanic/Latino	18%	18%	\$30,000 - \$75,000	34%	34%
Black/African American	10%	8%	Over \$75,000	25%	19%
American Indian/ Alaska Native	5%	6%	Prefer not to answer	15%	17%
Asian	3%	5%			
Other	5%	5%			

Demographics Summary – Transit Dependent vs. Independent

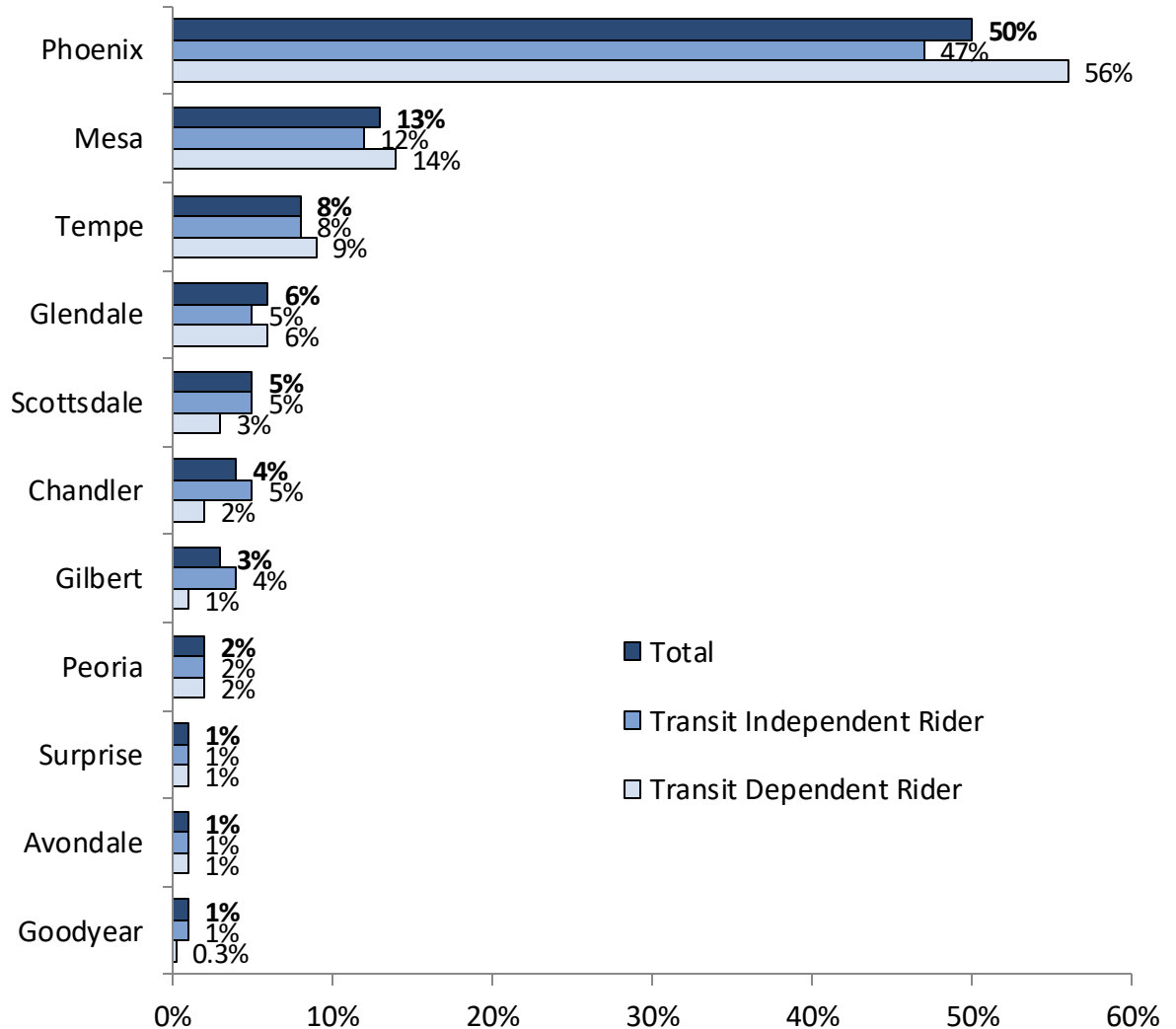
Independent Riders were significantly more likely to be Female or report themselves as White while Dependent Riders were more likely to be Male or report to be Hispanic, Black, or American Indian. Unsurprisingly, Dependent Riders were significantly more likely to report an annual income of \$30,000 or less while Independent Riders were more likely to report higher incomes.

Demographics	Total n=2163	Transit Inde- pendent Riders n=1481	Transit Dependent Riders n=664	Demographics	Total n=2163	Transit Inde- pendent Riders n=1481	Transit Dependent Riders n=664
Gender				Age			
Female	56%	58%	52%	18-34	22%	20%	25%
Male	42%	40%	45%	35-54	40%	40%	39%
Other	2%	2%	3%	55 or older	36%	38%	33%
Ethnicity				Annual Household Income			
White	66%	70%	58%	Under \$30,000	26%	15%	50%
Hispanic/Latino	18%	16%	22%	\$30,000 -\$75,000	34%	37%	27%
Black/African American	10%	9%	13%	Over \$75,000	25%	34%	5%
American Indian/ Alaska Native	5%	4%	9%	Prefer not to answer	15%	14%	18%
Asian	3%	4%	2%				
Other	5%	4%	6%				

City of Residence 2021

One-half of respondents reported they currently live in Phoenix with significantly more Dependent Riders mentioning Phoenix. Independent Riders were significantly more likely to report living in other cities such as Gilbert, Goodyear, Sun city, Buckeye, and Queen Creek.

**Top Cities of Residence
Among All Participants**



Q23: Which city do you live in?

Total n=2143 Transit Independent Rider n=1480 Transit Dependent Rider n=663

Employment Characteristics 2021

More than half of respondents were full time employed at the time of the survey and another one in ten reported to be employed part time, meaning two-thirds (69%) of all respondents were employed at least part-time.

Independent Riders were significantly more likely to report being employed full-time. More than one in five respondents who reported themselves as essential workers said they worked in government, this is particularly true for Independent Riders (25%). Dependent riders were more likely to work in food and Agriculture (22%).

Employment Characteristics	Total n=2145	Transit Inde- pendent Riders n=1481	Transit Dependent Riders n=664	Employment Characteristics	Total n=995	Transit Inde- pendent Riders n=765	Transit Dependent Riders n=230
Employment Status				Essential Worker Industry			
Full time employed	58%	66%	40%	Government	22%	25%	12%
Retired	15%	15%	17%	Healthcare	17%	17%	18%
Unemployed*	11%	7%	19%	Transportation and Logistics	11%	12%	9%
Part time employed	11%	9%	16%	Food and Agriculture	11%	8%	22%
Student	5%	4%	8%	Financial	6%	6%	3%
Homemaker	4%	4%	4%	Critical manufacturing	5%	5%	4%
Prefer not to answer	3%	2%	6%	Communications/IT	5%	5%	4%
Essential Worker				Community-based Organization	5%	6%	2%
Total	53%	57%	47%	Emergency services	2%	2%	3%
Current Riders	50%	55%	44%	Other	28%	25%	36%
Former Riders	59%	93%	6%	No answer	3%	4%	2%

*Unemployment rate was 6.7% at time of the study

Vehicle Access Characteristics – Transit Dependent vs. Independent

As stated in the methodology, **Transit Independent Riders** are defined as having a driver’s license AND owning at least one vehicle in the household. **Transit Dependent Riders** are defined as NOT having a driver’s license OR having zero vehicles in the household.

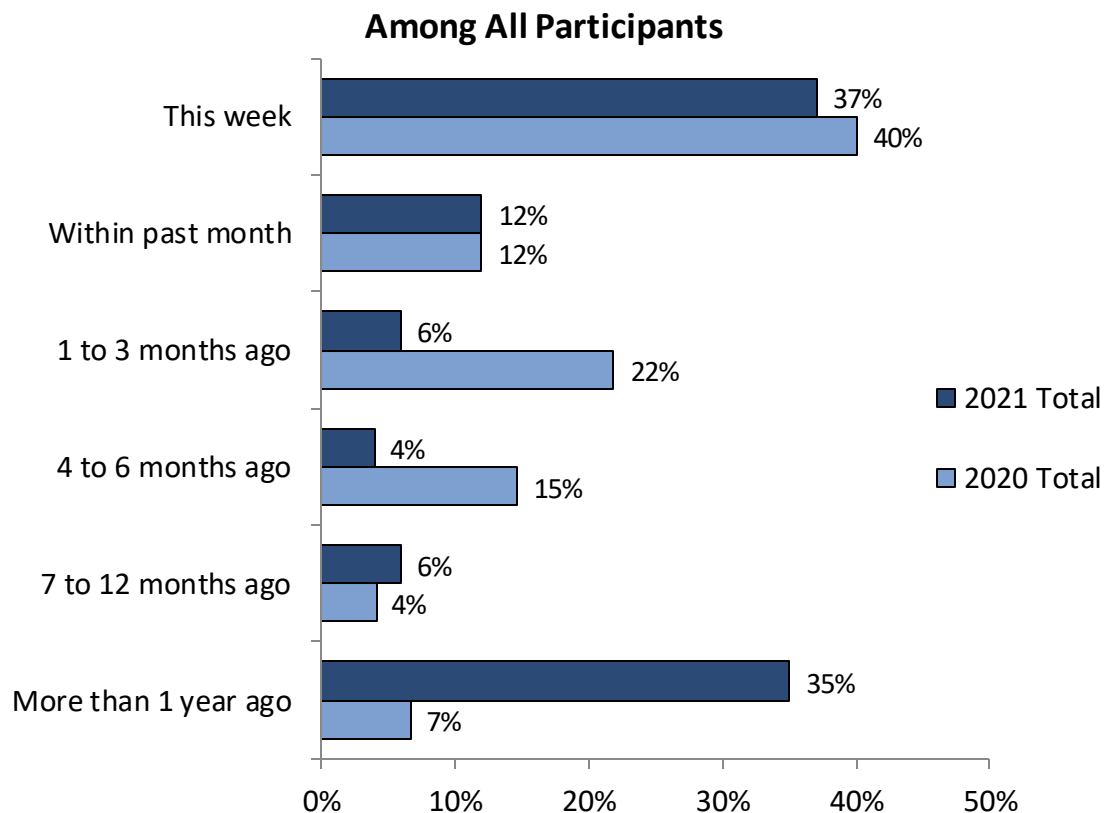
Eight in ten of all respondents have a valid driver’s license and the same amount have at least one vehicle in their household. Out of those with at least one vehicle, 85% are able to use those vehicles found in their household. Two in ten do not have a valid driver’s license and the same percentage has no cars available to them at home.

Vehicle Access	Total n=2145	Transit Independent Riders n=1481	Transit Dependent Riders n=664
Have Valid Driver’s License	79%	100%	31%
Have 1+ Vehicles in HH	79%	100%	33%
Able to Use HH Vehicles	85%	92%	34%
Number of Available Vehicles in HH			
Zero/None	21%	-	67%
1 Vehicle	36%	43%	21%
2 Vehicles	30%	39%	9%
3 Vehicles	9%	12%	2%
4 Vehicles	3%	4%	1%
5 or more Vehicles	1%	2%	<1%

Public Transit Usage – 2021 vs. 2020

One-third (35%) of respondents have not ridden public transit since the start of the COVID-19 pandemic (in over a year). This is a slight increase from last year where 26% of 2020 respondents reported they had not ridden public transit since before the start of the pandemic (4 months+ without riding in 2020).

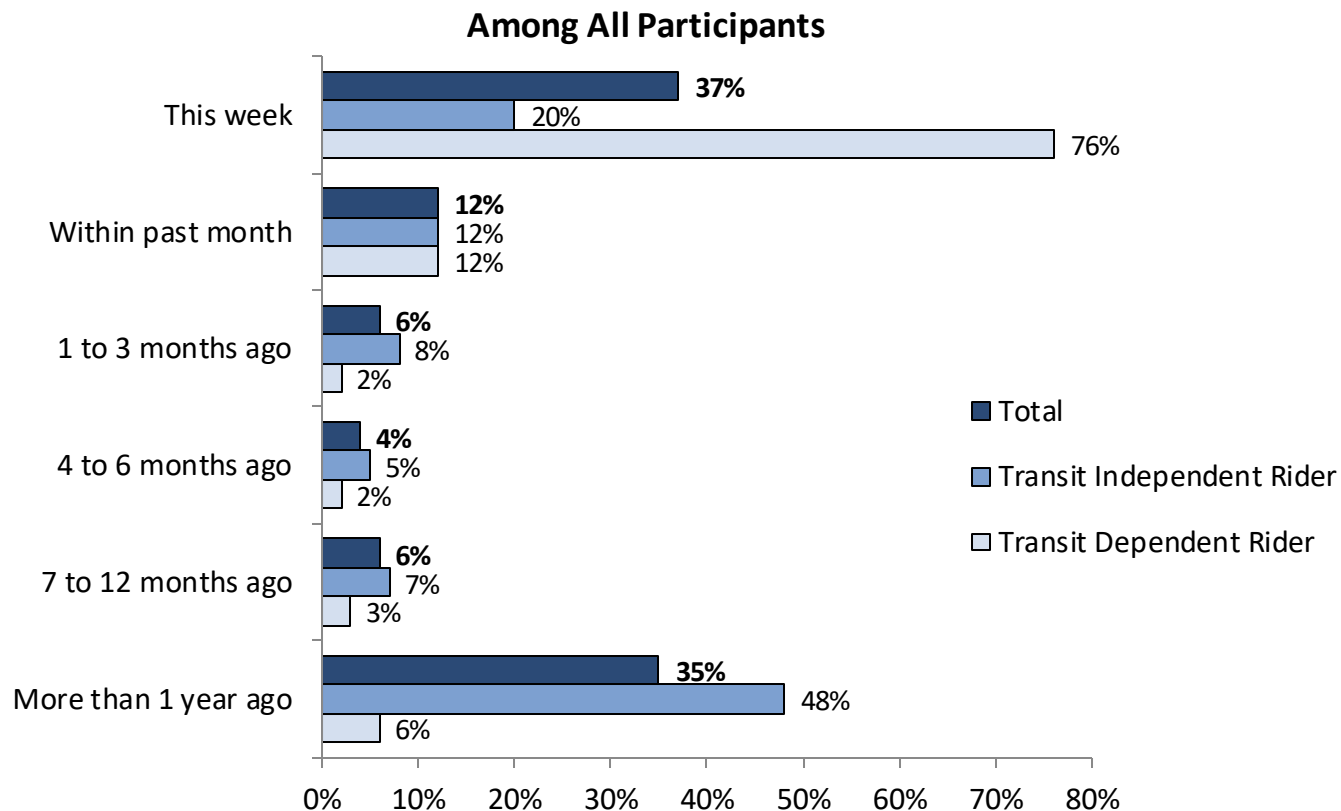
The percentage of respondents who are currently riding (within the past month) is consistent with last year’s measures, showing ridership hasn’t fully recovered from the pandemic’s shut-down and decrease in ridership.



Q1: When was the last time you used public transit here in the Phoenix area?
2021 Total n=2163 2020 Total n=1494

Public Transit Usage – Transit Dependent vs. Independent

Unsurprisingly, Dependent Riders were significantly more likely to be current riders (88% Dependent vs. 32% Independent in the past month), while Independent Riders were more likely to report not riding in the past year.



Q1: When was the last time you used public transit here in the Phoenix area?
Total n=2163 Transit Independent Rider n=1481 Transit Dependent Rider n=664

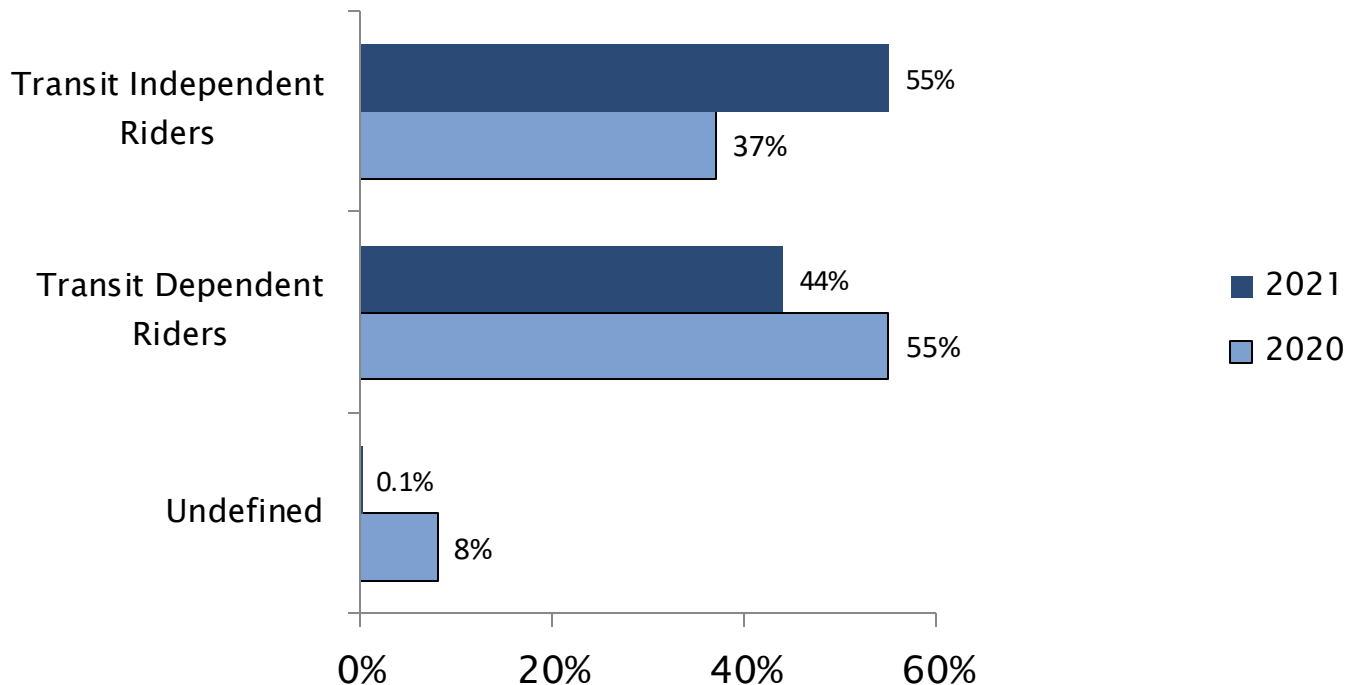
Pandemic Riders (Used Public Transit Since March 2020)



Current Riders

More than half of current riders (those who have used public transit in the past 30 days) are Independent Riders (55%) while roughly four in ten are Dependent Riders (44%). This is flipped compared to last year's split between Independent and Dependent Riders. "Undefined riders" refers to those respondents who only partially completed the survey and did not answer the demographic questions.

Breakdown of Current Riders

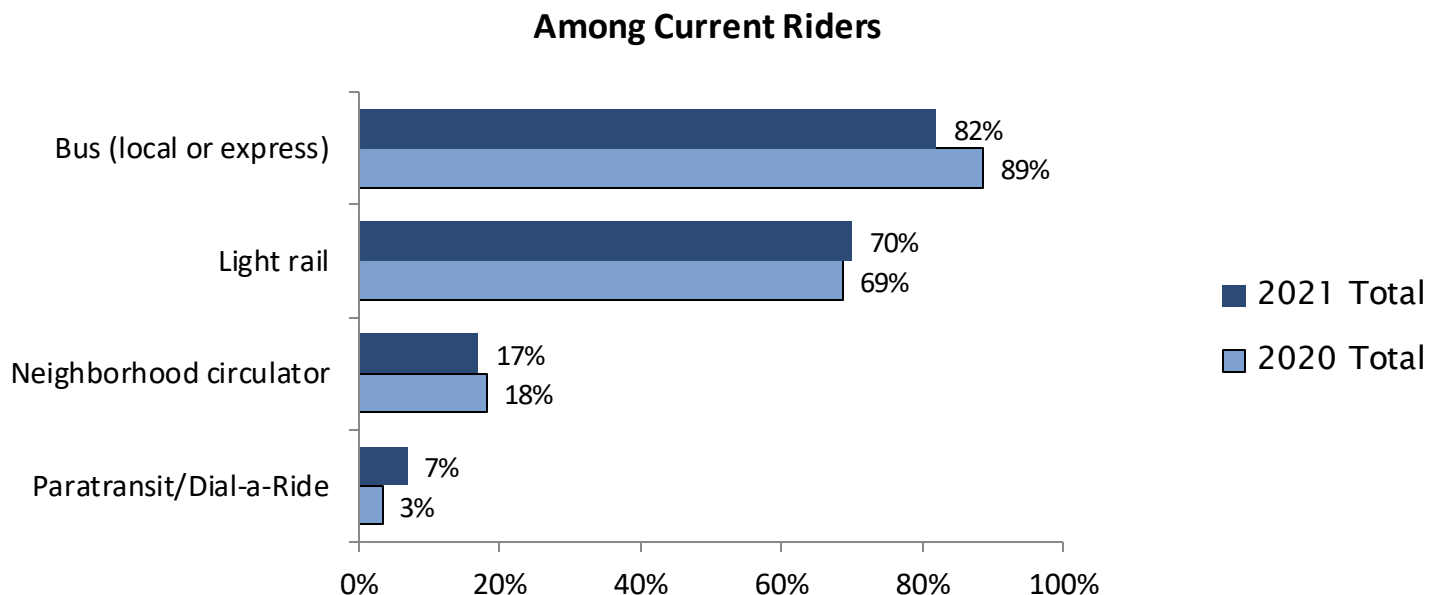


2021: Total n=1403 Transit Independent Rider n=772 Transit Dependent Rider n=623 Undefined n=8
2020 Total n=772 Transit Independent Rider n=285 Transit Dependent Rider n=423 Undefined n=64

Current Usage of Public Transit

Similar to last year, most current transit users ride the bus (82%) and/or light rail (70%) with 17% reporting they use neighborhood circulators. A small percentage (7%) rely on paratransit or Dial-a-ride services from Valley Metro.

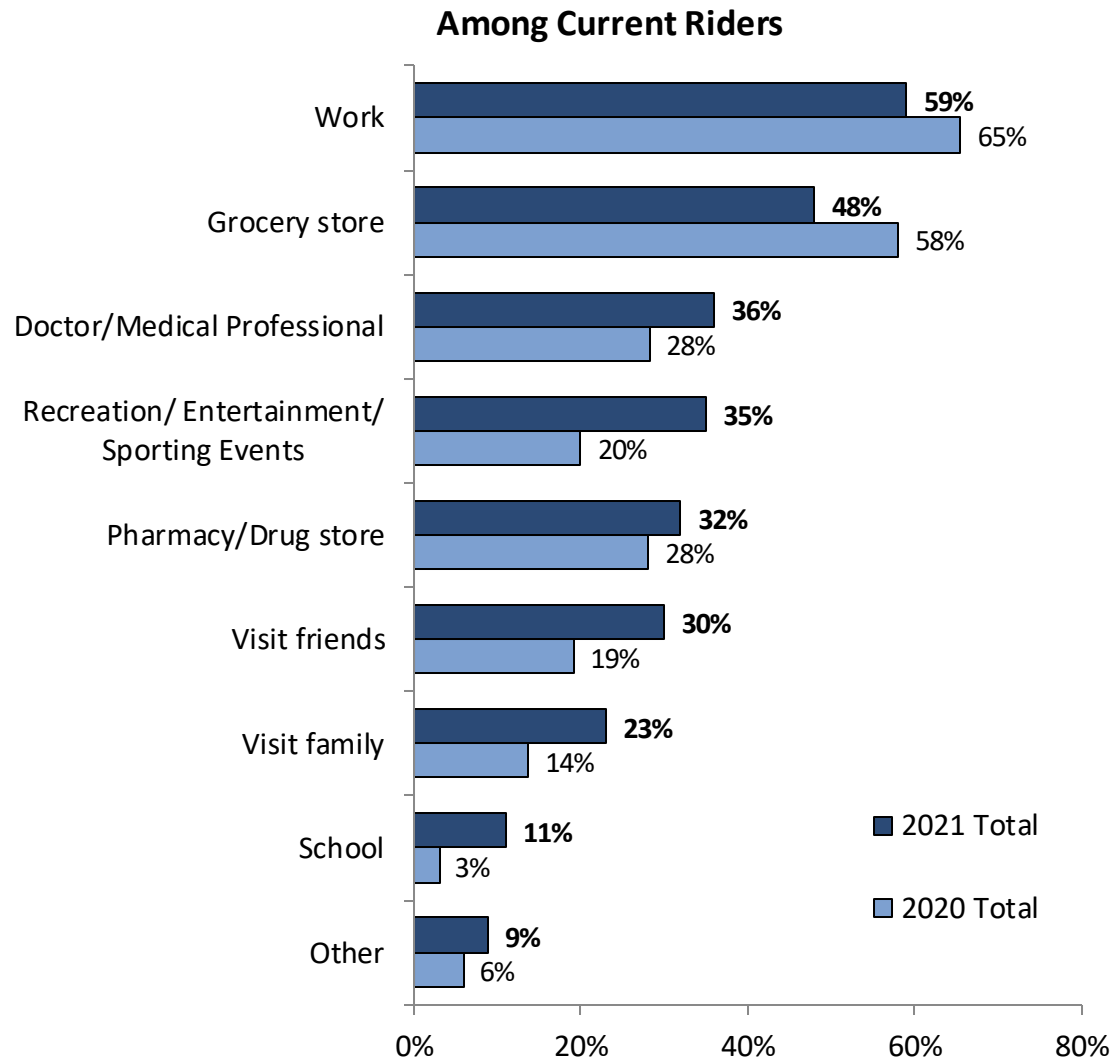
Dependent Riders are significantly more likely than Independent Riders to report riding the bus (92% vs. 74%) and the neighborhood circulators (21% vs. 14%) in 2021.



Types of Trips in the Past 30 Days – 2021 vs. 2020

The top two types of trips reported by riders remained the same as in 2020 with one in six mentioning “work” and one-half mentioning “grocery stores”. However, both of these have slightly fewer mentions since last year.

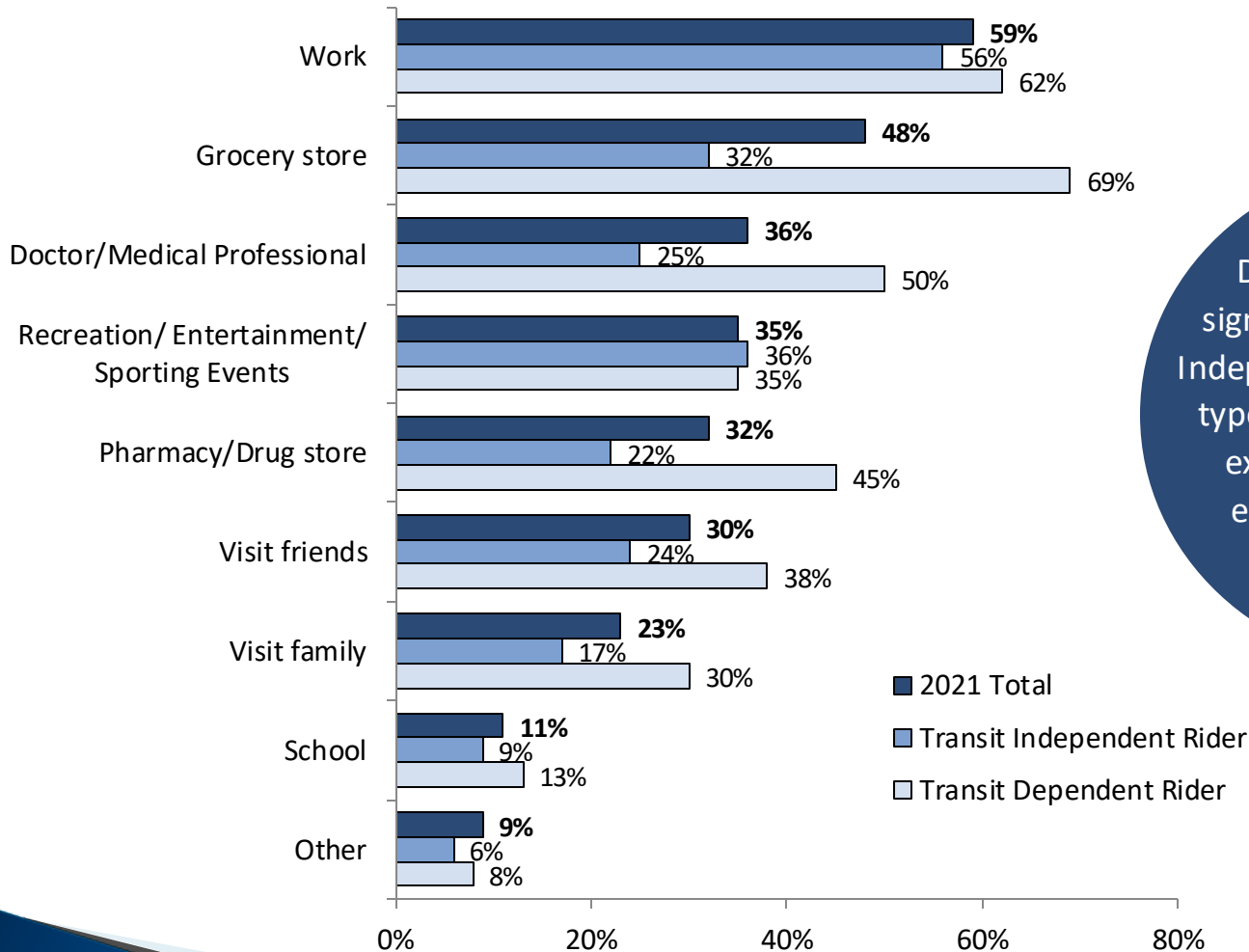
All other trip mentions have increased slightly compared to 2020, which isn’t surprising as businesses have reopened and social restrictions have lessened since 2020.



Q3: In the past 30 days, what type of trip(s) have you made using public transit?
2021 n=1403; 2020 n=759

Types of Trips in the Past 30 Days – Transit Dependent vs. Independent

Among Current Riders



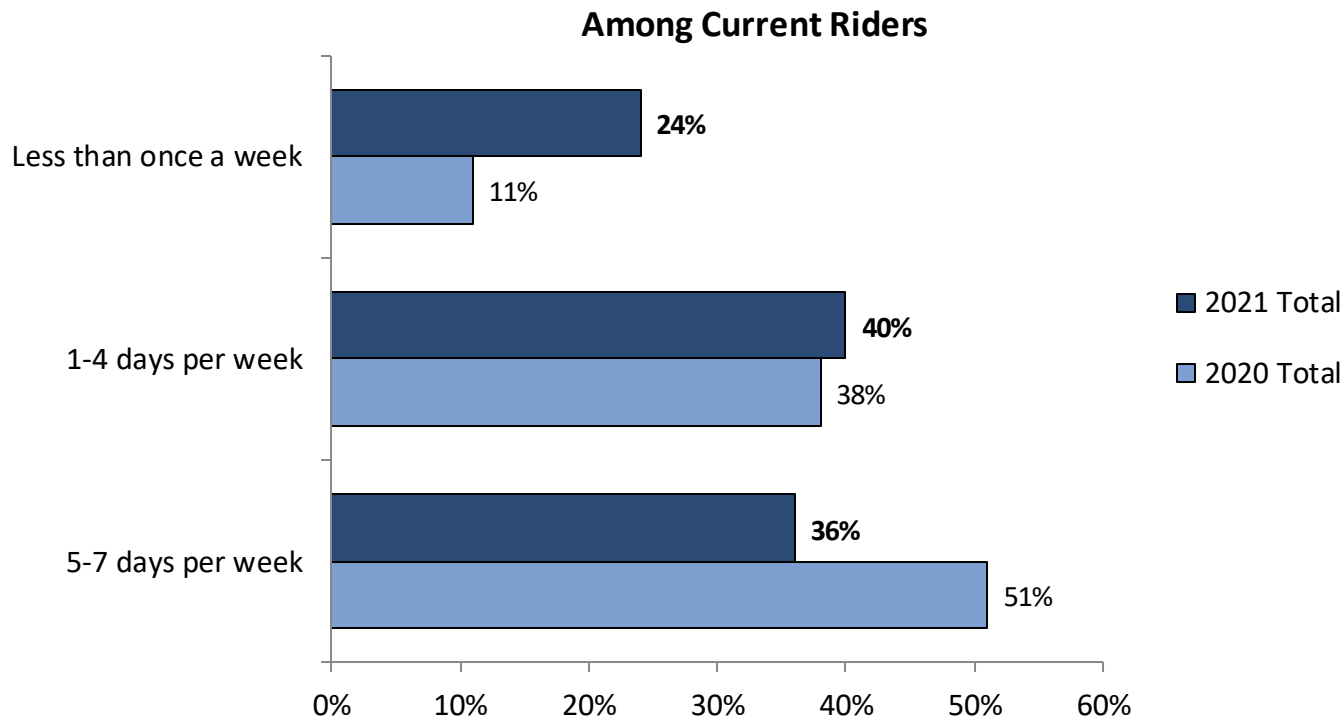
Dependent Riders were significantly more likely than Independent Riders to report all types of trips shown with the exception of “recreation/ entertainment/ sporting events”.

Q3: [Since the start of the pandemic last March/In the past 30 days,] what type of trip(s) have you made using public transit?

Total n=1403 Transit Independent Rider n=772 Transit Dependent Rider n=623

Current Frequency of Using Public Transit – 2021 vs. 2020

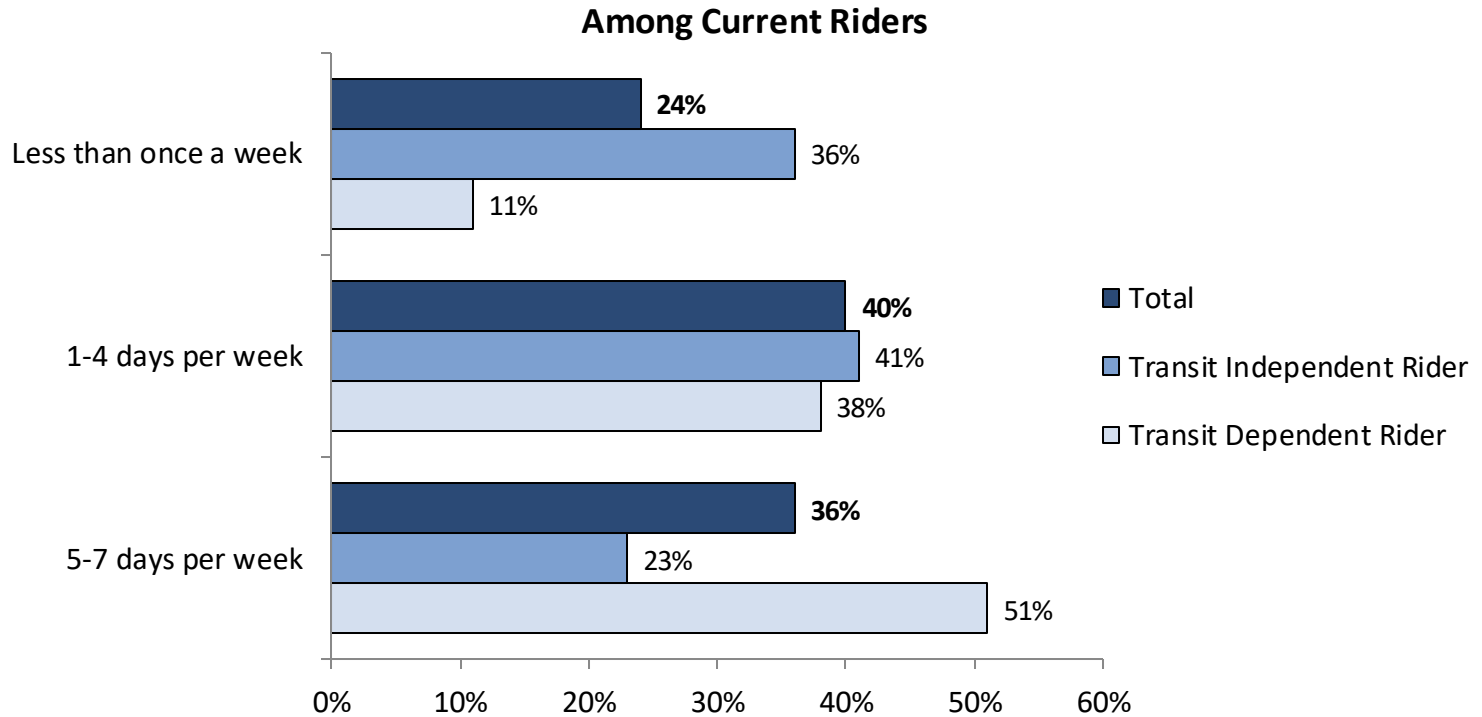
Interestingly, current riders of public transit are riding less frequently this year compared to June of 2020 with one-quarter (24%) reporting they ride less than once a week and only one-third (36%) riding 5-7 days per week. This likely is due to the influx of riders who are returning to transit usage at a limited level as COVID restrictions begin to ease.



Q4: Currently, In an average week, how many days do you use public transit?
2021 Total n=1403; 2020 Total n=769

Current Frequency of Using Public Transit Transit Dependent vs. Independent

As to be expected, Dependent Riders are significantly more likely to report riding public transit 5-7 days per week than Independent Riders, who are more likely to report riding less than once a week. An equal percentage of each type of rider reported riding between 1 and 4 days per week.



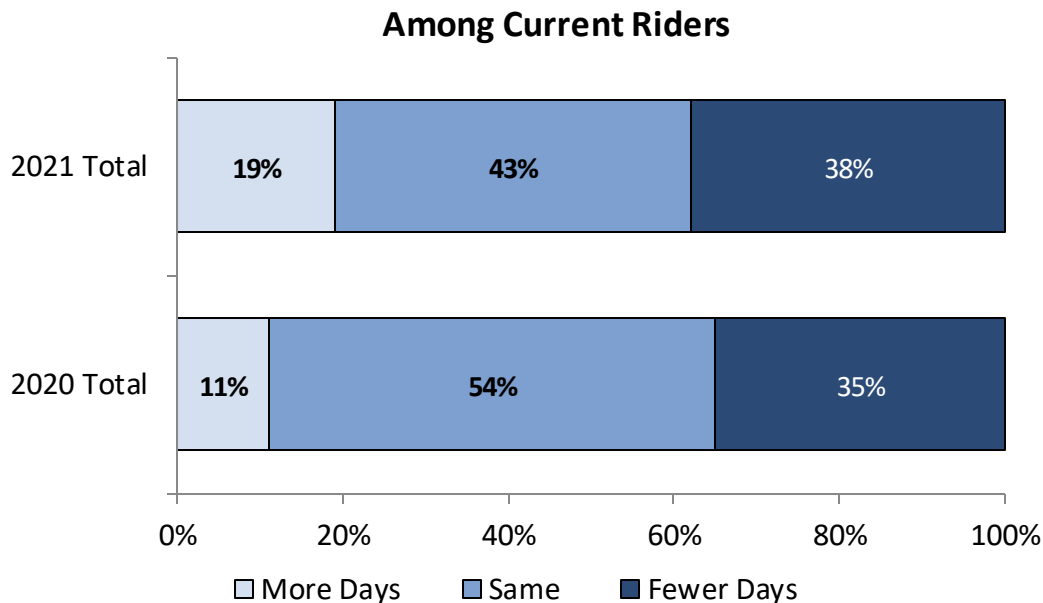
Q4: Currently, In an average week, how many days do you use public transit?

Total n=1403 Transit Independent Rider n=772 Transit Dependent Rider n=463

Change in Frequency of Public Transit Usage Since COVID-19 2021 vs. 2020

Four in ten (43%) current riders say their frequency of riding public transit is the same as it was prior the start of the pandemic in March of 2020, which is a slight decrease compared to those who reported the same in 2020.

Interestingly, two in ten (19%) of current riders say their frequency of riding public transit is more than they used to ride, which is slightly higher than the percentage who reported the same in 2020.

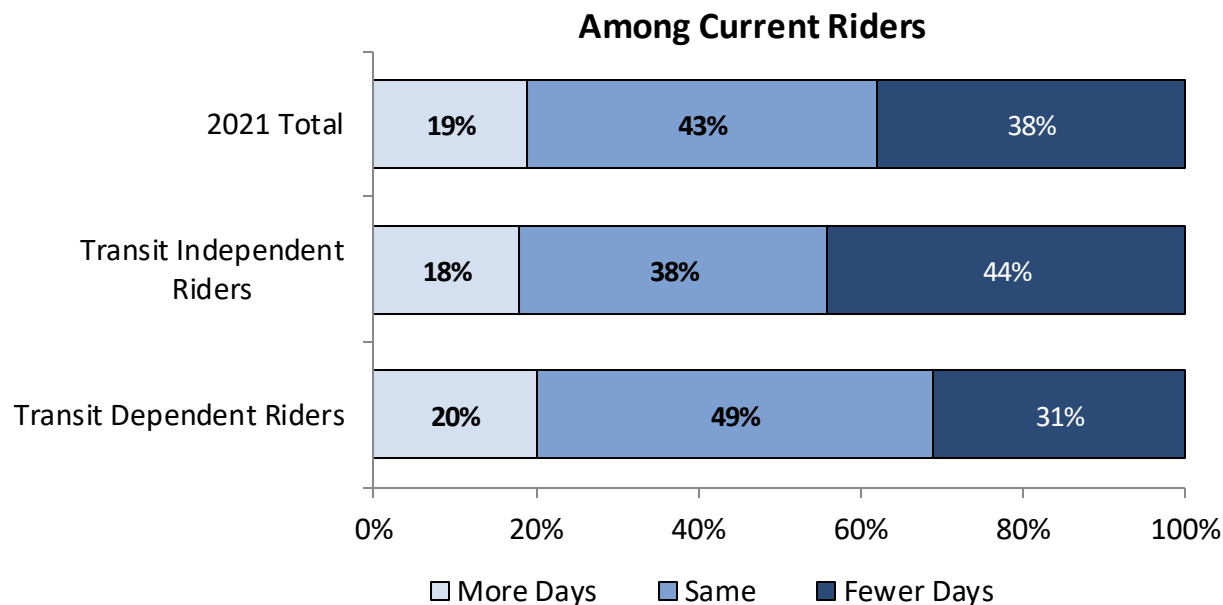


Q4a: Is that more, less or the same number of days per week you were using public transit before the start of the COVID-19 pandemic?

2021 Total n=1403; 2020 Total n=767

Change in Frequency of Public Transit Usage Since COVID-19 Transit Dependent vs. Independent

Independent Riders were more likely to say they are riding fewer days than before the pandemic (44% fewer days vs. 31% for Dependent Riders). This along with the lower reported frequency reinforces the notion that Independent Riders have not returned to riding public transit at their usual rate, even though it's been over a year since the start of the pandemic.



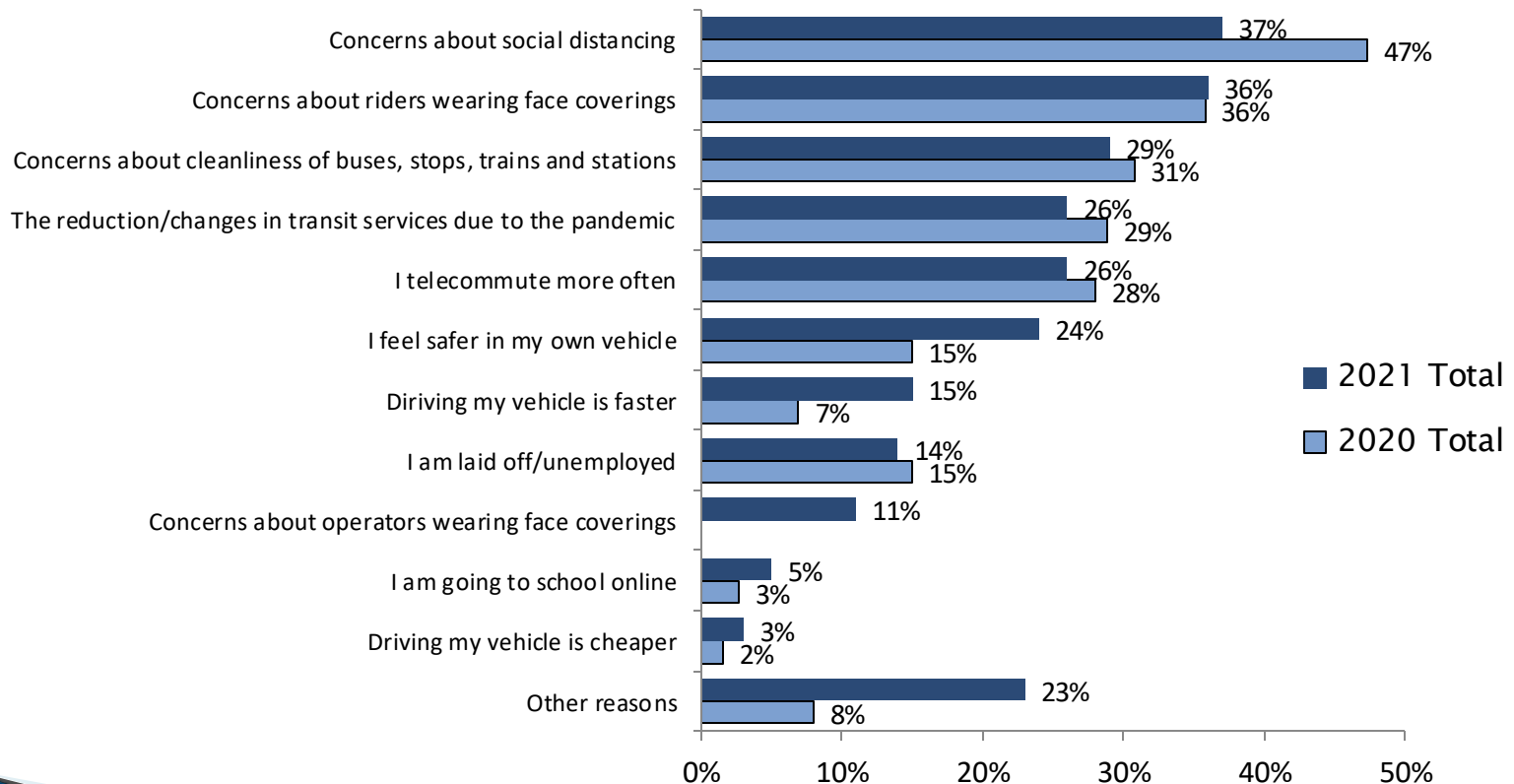
Q4a: Is that more, less or the same number of days per week you were using public transit before the start of the COVID-19 pandemic?

2021 Total n=1403 Transit Independent Riders n=772 Transit Dependent Riders n=623

Reasons For Using Public Transit Less Often – 2021 vs. 2020

The top five reasons for using public transit less often in 2021 are the same top reasons mentioned in 2020. However, “concerns about social distancing”, which is still ranked as number one, decreased significantly in mentions from last year (37% down from 47%). Additionally, there were significantly more mentions of respondents’ personal vehicles being “safer” (24%) and “faster” (15%) this year compared to 2020, especially among Independent Riders.

Among Current Riders Using Public Transit Less Often



NOTE: The concerns about face coverings were combined as one question in 2020 but split into two (operators vs. riders) in 2021.

Q4b: Please select the reasons that explain why you are using public transit less often now:

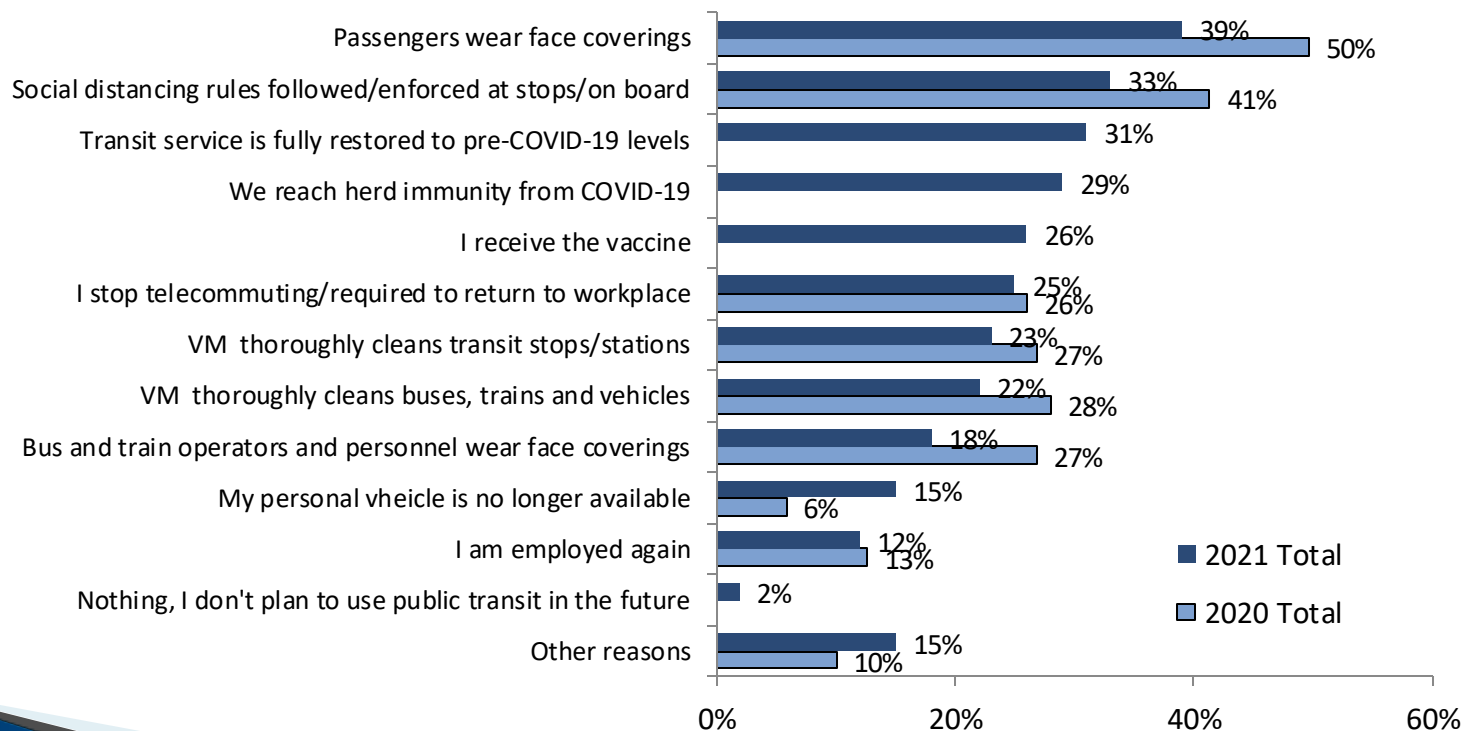
Total 2021 n=539; 2020 n=260

Requirements to Return to Pre-COVID Transit Use Frequency

The top two needs for riders to return to pre-COVID frequency of use are again for *passengers to wear face coverings* and for *enforced social distancing rules*, although both responses are given by significantly fewer riders than in 2020. Similarly 2021 riders are less likely to indicate they are waiting for VM to keep vehicles and stops clean or enforce mask-wearing for staff.

Independent Riders were significantly more likely to mention they would ride more if their *personal vehicle is no longer available* (20% vs. 8%) while Dependent Riders were more likely to ride public transit more often if they were *employed again* (18% vs. 9%).

Among Current Riders Using Public Transit Less Often



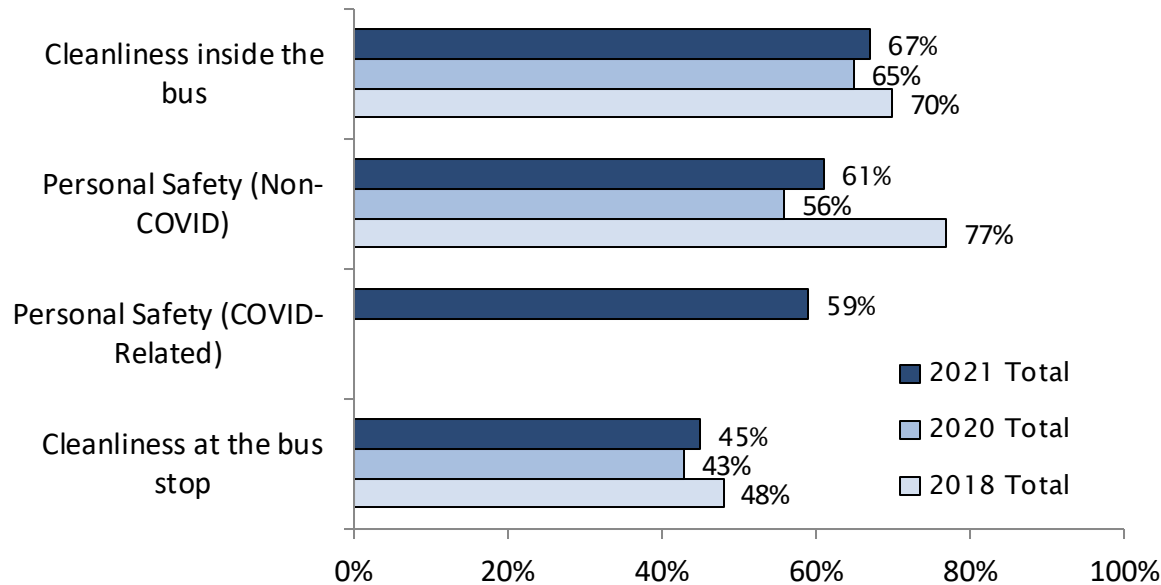
Q4d: Which of the following need to happen for you to go back to using public transit with the same frequency as you did before the pandemic?
Total 2021 n=539; 2020 n=260

Satisfaction with Bus Service Elements in Past 30 Days

Respondents were slightly more satisfied this year compared to 2020 for each bus service element, showing they are slowly climbing back to pre-COVID satisfaction levels. The largest gap in satisfaction compared to 2018 is with non-COVID related personal safety (61% 2021 vs. 77% 2018).

Notably, Independent Riders were significantly more likely to report satisfaction (4/5 – Very Satisfied) with cleanliness at the bus stop compared to Dependent Riders (50% vs. 40%).

**Top-Two Satisfaction Rating (4 + 5 , 5 means “Very Satisfied”)
Among Current Riders**



QSAT1: Based on your experience on your typical trip RIDING THE BUS over the past 30 days, please indicate your level of satisfaction with the following BUS service elements. 2021 n=1143; 2020 n=664

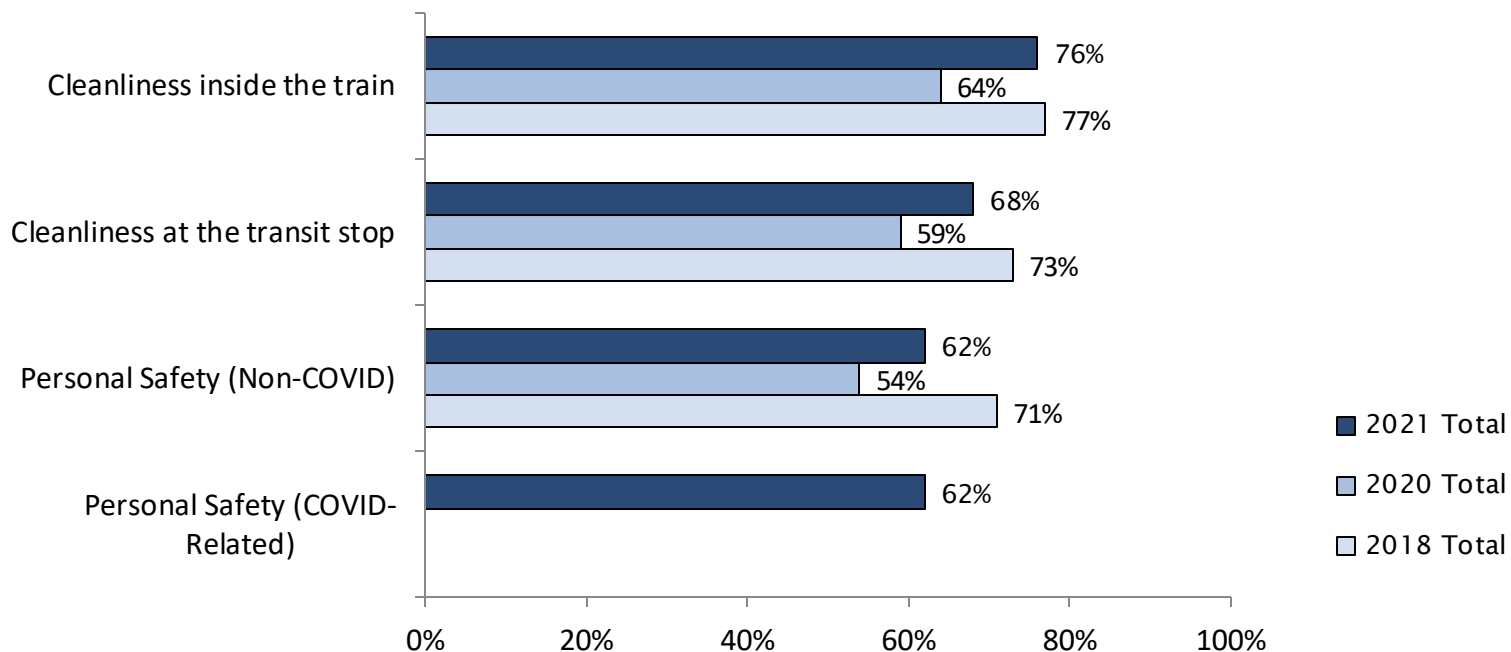
Note: Personal safety was split for non-COVID and COVID-related in 2021, a single personal safety element was used in 2020.

Satisfaction with Light Rail Service Elements in Past 30 Days

As was true with the bus elements, respondents are on their way to returning to pre-COVID satisfaction levels for each Light Rail element. However, the largest gap remaining from 2018 is again with non-COVID personal safety (62% 2021 vs. 71% 2018).

Satisfaction levels remained similar between Independent and Dependent Riders.

**Top-Two Satisfaction Rating (4 + 5 , 5 means “Very Satisfied”)
Among Current Riders**



QSAT2: Based on your experience on your typical trip RIDING THE LIGHT RAIL over the past 30 days, please indicate your level of satisfaction with the following LIGHT RAIL service elements. 2021 n=977; 2020 n=509

Note: Personal safety was split for non-COVID and COVID-related in 2021, a single personal safety element was used in 2020.

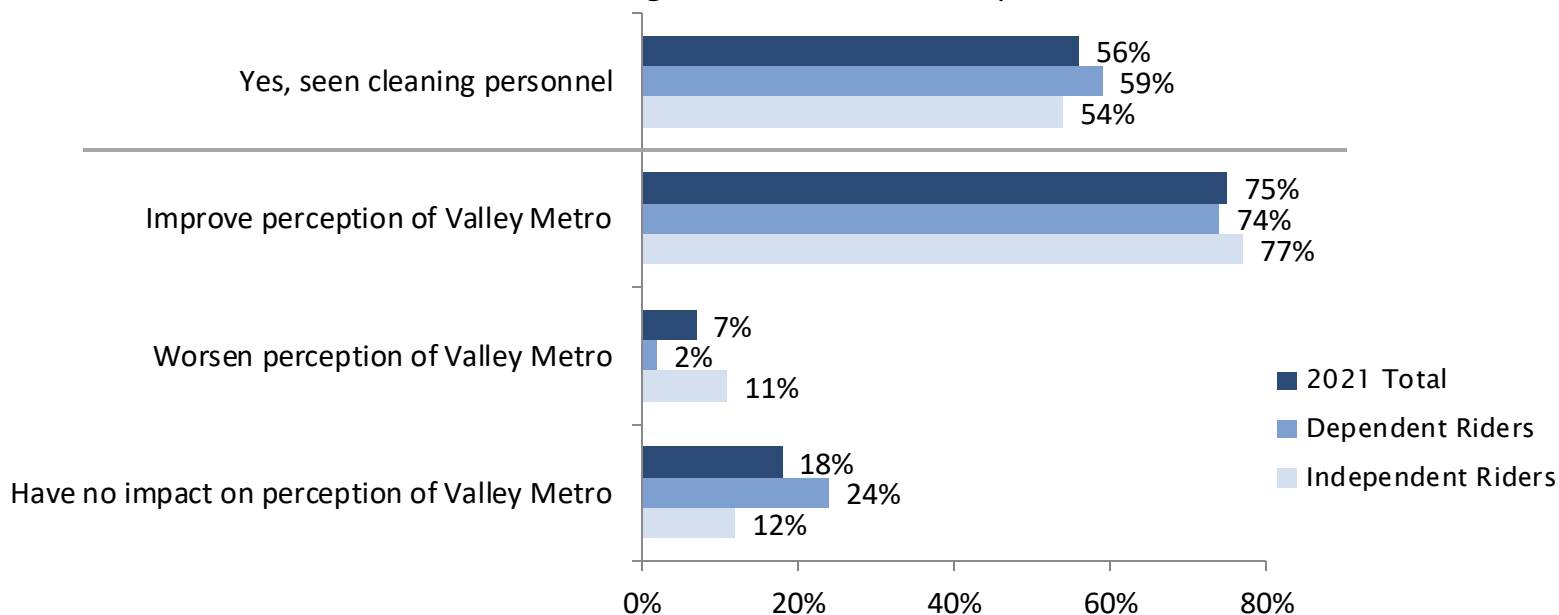
Impact of Cleaning Personnel

More than one-half of current riders (56%) reported seeing Valley Metro cleaning personnel at Light Rail platforms and transit centers. Of those riders who have seen the cleaning personnel, three-quarters said this improved their perception of Valley Metro.

Notably, Independent Riders were significantly more likely than Dependent Riders to report seeing cleaning personnel worsened their perception of Valley Metro (11% vs. 2%).

Impact of Cleaning Personnel Presence at Platforms and Transit Centers

Among those who have seen personnel



QSAT3. Have you seen any Valley Metro cleaning personnel at light rail platforms and transit centers? n=1403
 QSAT 3b. IF YES: How does the presence of cleaning personnel impact your perception of Valley Metro. Does it improve your perception of Valley Metro, worsen your perception of Valley Metro, or does it have no impact on your perception of Valley Metro? Total n=792 Independent Riders n=772 Dependent Riders n=623

**Former Riders
(Have Not Used Public Transit Since March 2020
But have used transit prior to COVID-19)**

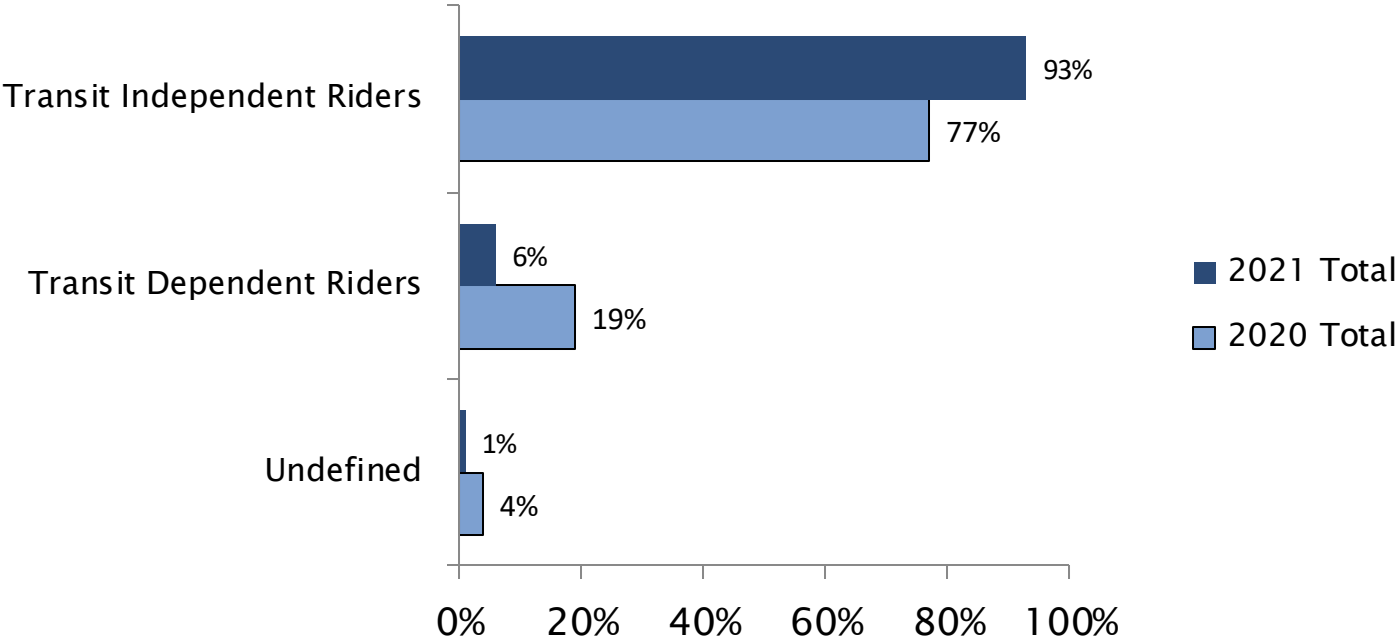


Former Riders

In 2021, more than nine in ten former riders were Transit Independent Riders while just 6% were Transit Dependent Riders.

Due to the small number of Dependent Riders in this section, caution should be taken when noticing significant differences between the two types of riders and projecting it on a larger population.

Breakdown of Former Riders

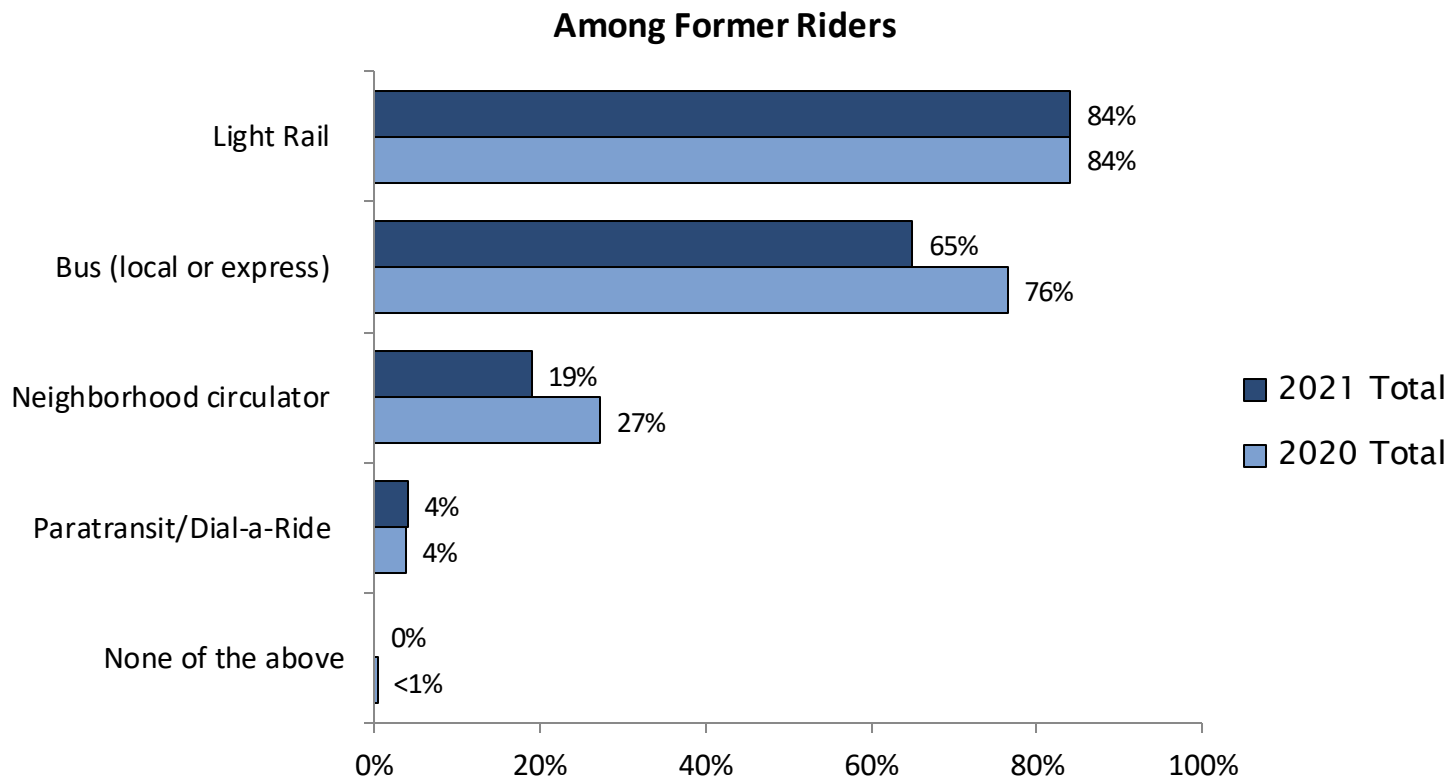


2021 Total 760; 2020 Total n=718

Former Usage of Public Transit

Similar to last year, more than eight in ten former riders reported they have ridden the Light Rail in the past (84%). However, former riders were less likely to report riding the bus or neighborhood circulators in comparison to 2020.

Dependent Riders were significantly more likely to report using the bus, neighborhood circulator, and paratransit/Dial-a-Ride in the past compared to Independent Riders.

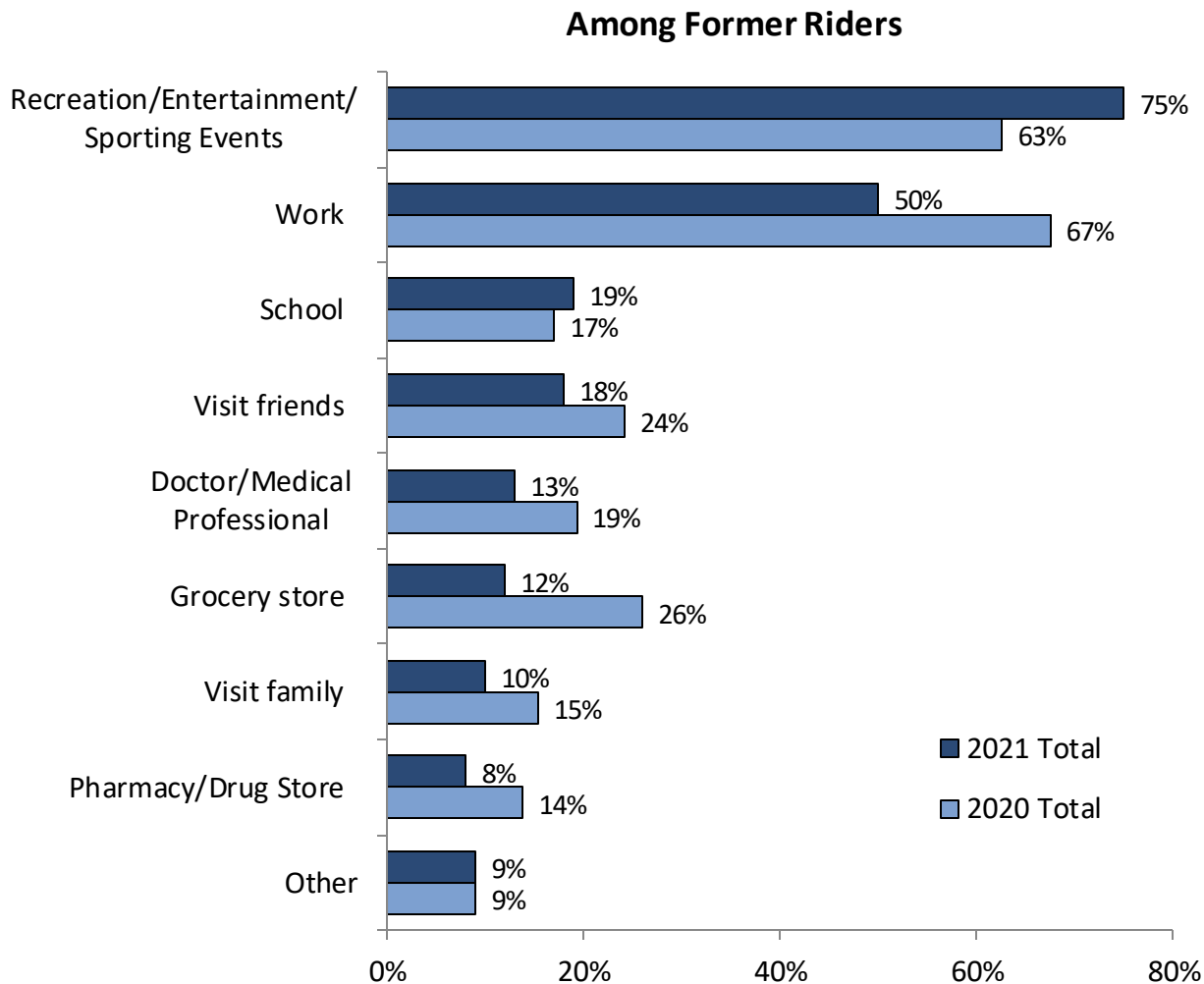


Q5: What modes of public transit have you used in the past?
2021 Total n=760; 2020 Total n=718

Types of Trips of Former Transit Usage – 2021 vs. 2020

Three-fourths of former riders reported their trips used to consist of going to *recreation/entertainment/sporting events* while another one-half said the trips were for *work*. This is the same top two responses for 2020 but in the opposite ranking order.

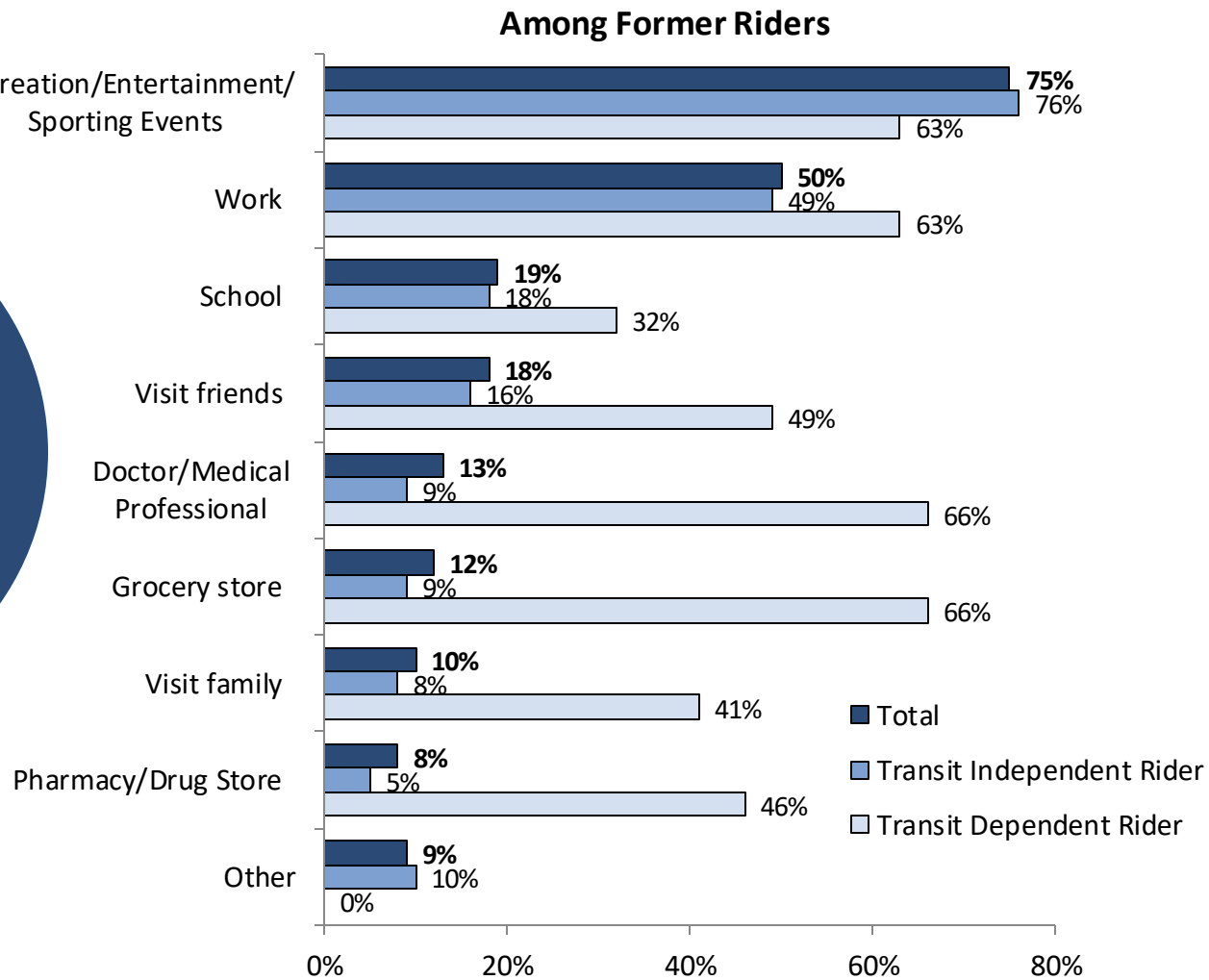
This year, former riders were less likely to mention *visiting friends or family, the doctor, grocery stores, and pharmacy/drug stores* compared to last year.



Q6: Please select the type of trip(s) you made using public transit in the past.
 2021 Total n=760; 2020 Total n=716

Types of Trips of Former Transit Usage Transit Dependent vs. Independent

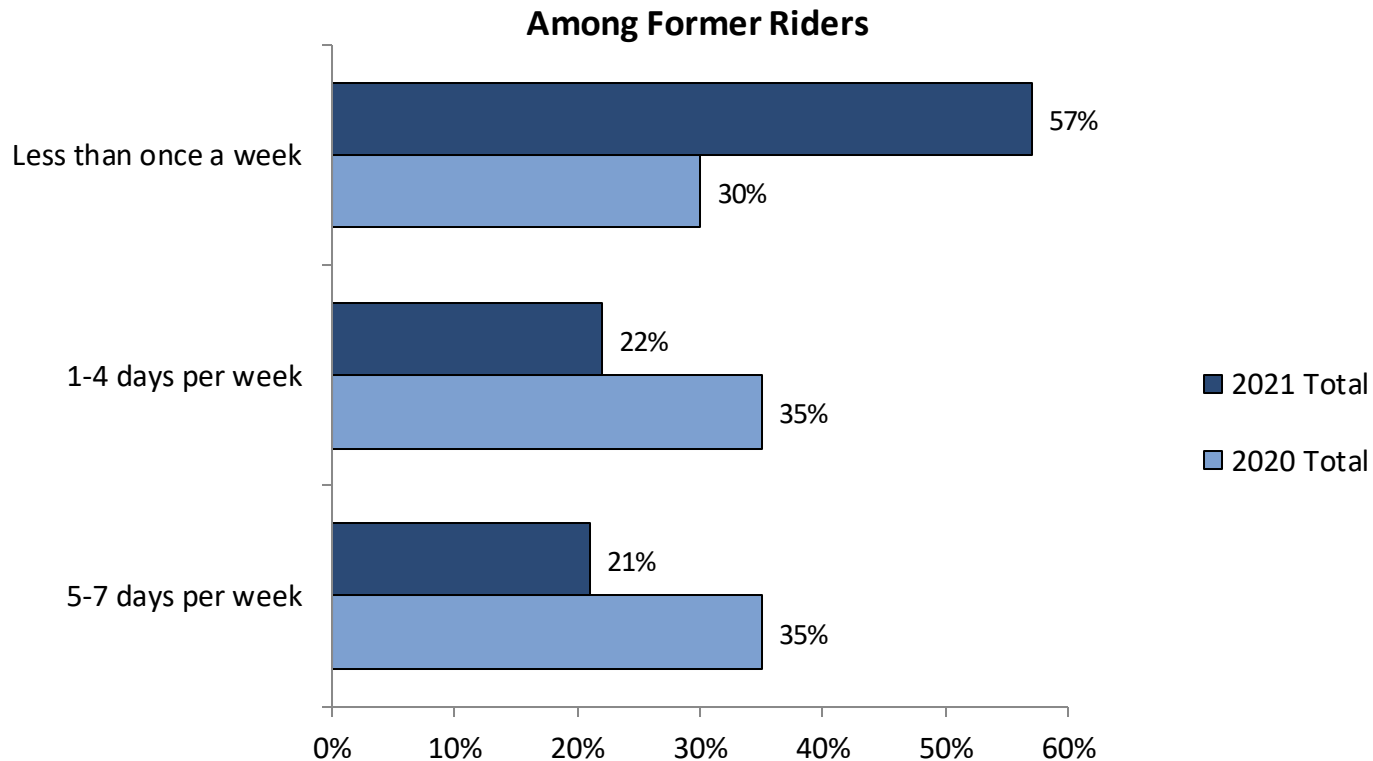
As expected, Independent former riders were more likely to mention using public transit for *recreation/entertainment/sporting events* while Dependent former riders were more likely to mention all other trips such as *work, school, and every day activities*.



Q6: Please select the type of trip(s) you made using public transit in the past.
Total n=760 Transit Independent Rider n=709 Transit Dependent Rider n=41

Former Frequency of Using Public Transit – 2021 vs. 2020

Since this year's makeup of former riders consists of mostly Independent Riders, it is not surprising to see a higher percentage of riders reporting they used to travel on public transit less than once a week (57%).



Q7: In an average week, how many days did you use public transit?
2021 Total n=760; 2020 Total n=713

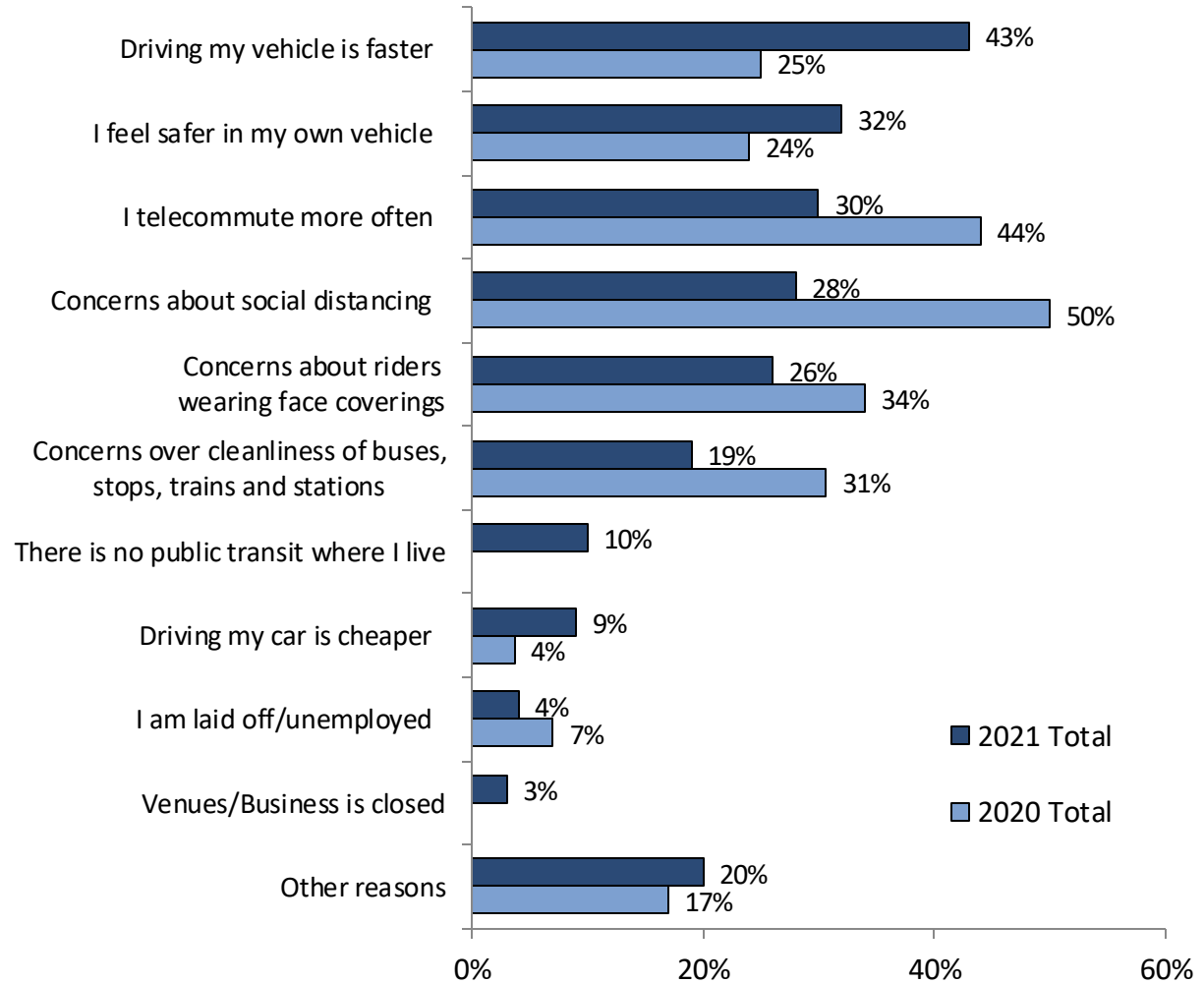
Primary Reasons for Not Currently Using Public Transit 2021 vs. 2020

In a shift from 2020, the top reasons for riders not currently riding public transit were personal vehicles being faster and safer, and telecommuting more often.

This is a significant shift from last year where the top reasons for not riding in 2020 were largely COVID-19 related, such as social distancing, face coverings, telecommuting, and cleanliness concerns.

This shift is partially due to the fact that most former riders are Independent Riders who don't need to use public transit as often and have more access to their own vehicles.

Among Former Riders



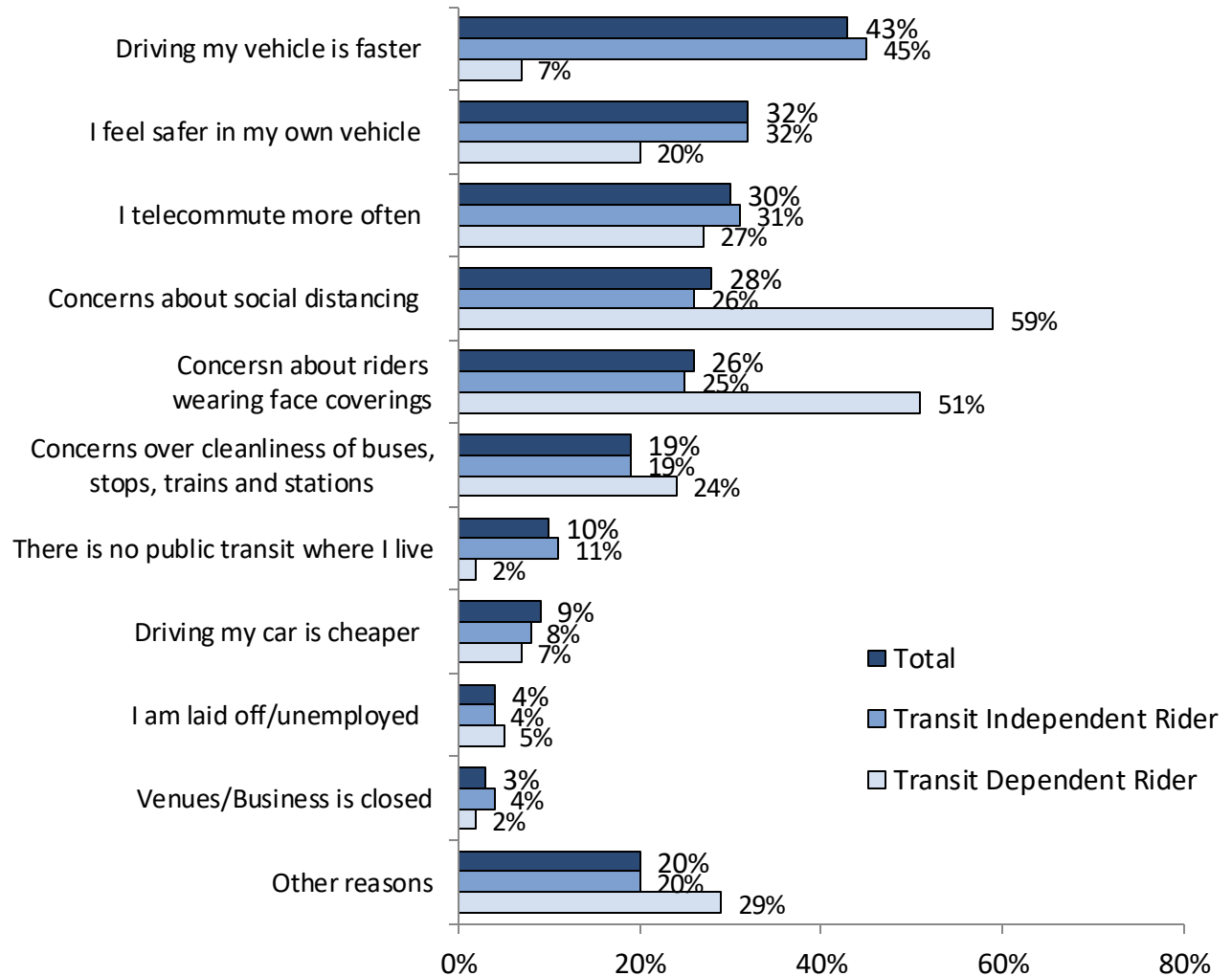
NOTE: The concerns about face coverings were combined as one question in 2020 but split into two (operators vs. riders) in 2021

Q8: Please select the three primary reasons you are not using public transit right now. Up to 3 responses selected. 2021 Total n=760; 2020 Total n=711

Primary Reasons for Not Currently Using Public Transit

Among Former Riders

Dependent Riders are still more concerned with the pandemic guidelines overall while riding public transit. They are significantly more likely to mention *social distancing*, *face coverings*, and *cleanliness* as their reasons for not currently riding compared to Independent Riders.



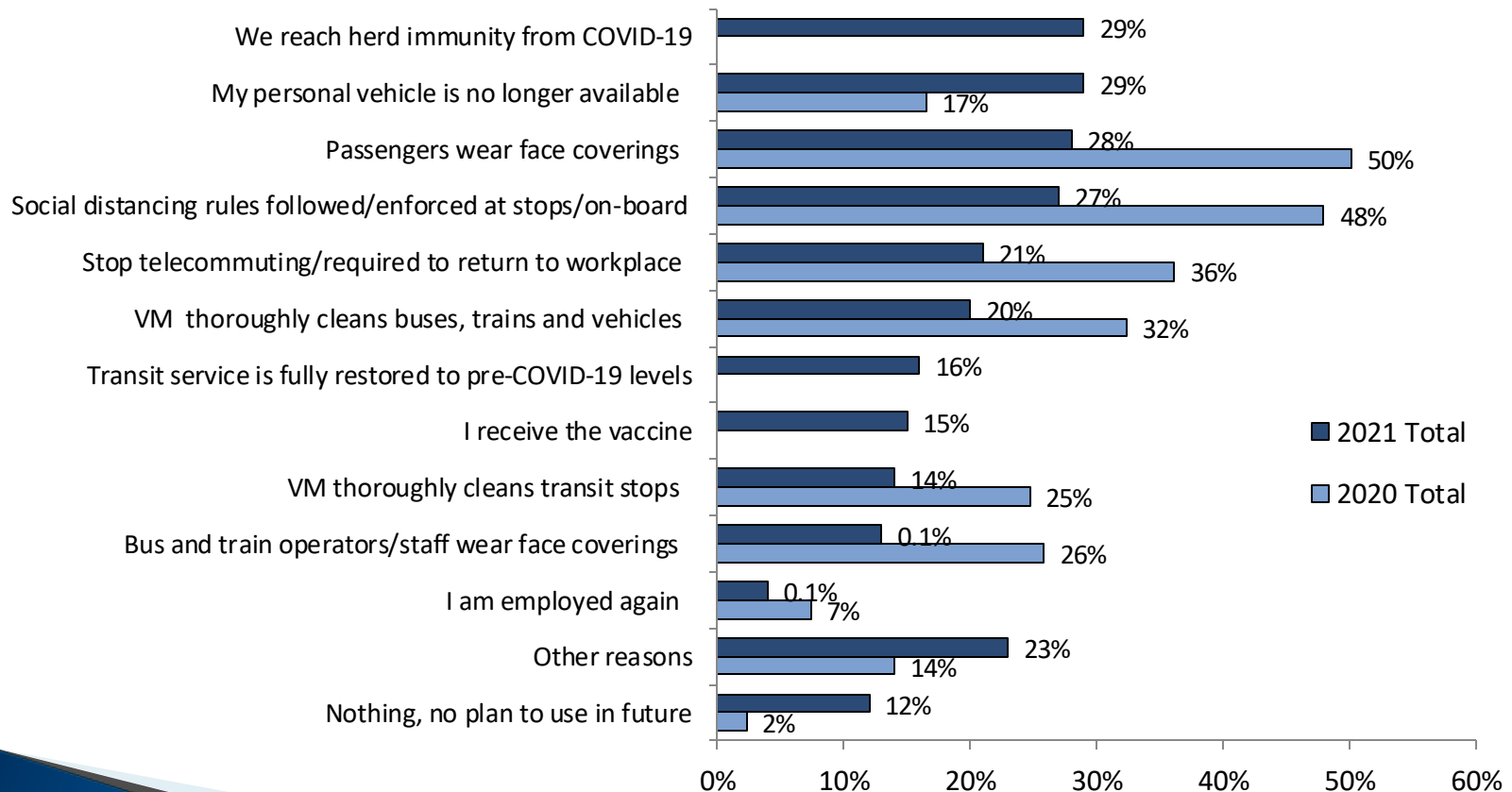
Q8: Please select the three primary reasons you are not using public transit right now? Up to 3 responses selected.

Total n=760 Transit Independent Rider n=709 Transit Dependent Rider n=41

Requirements to Return to Using Public Transit – 2021 vs. 2020

The top requirements for former riders to return to using public transit were *reaching herd immunity, my personal vehicle is no longer available, and passengers wear face coverings* with one in three mentioning each of these requirements (28%-29%). In general, former riders were less likely to select COVID-related requirements in 2021 than they were in 2020.

Among Former Riders



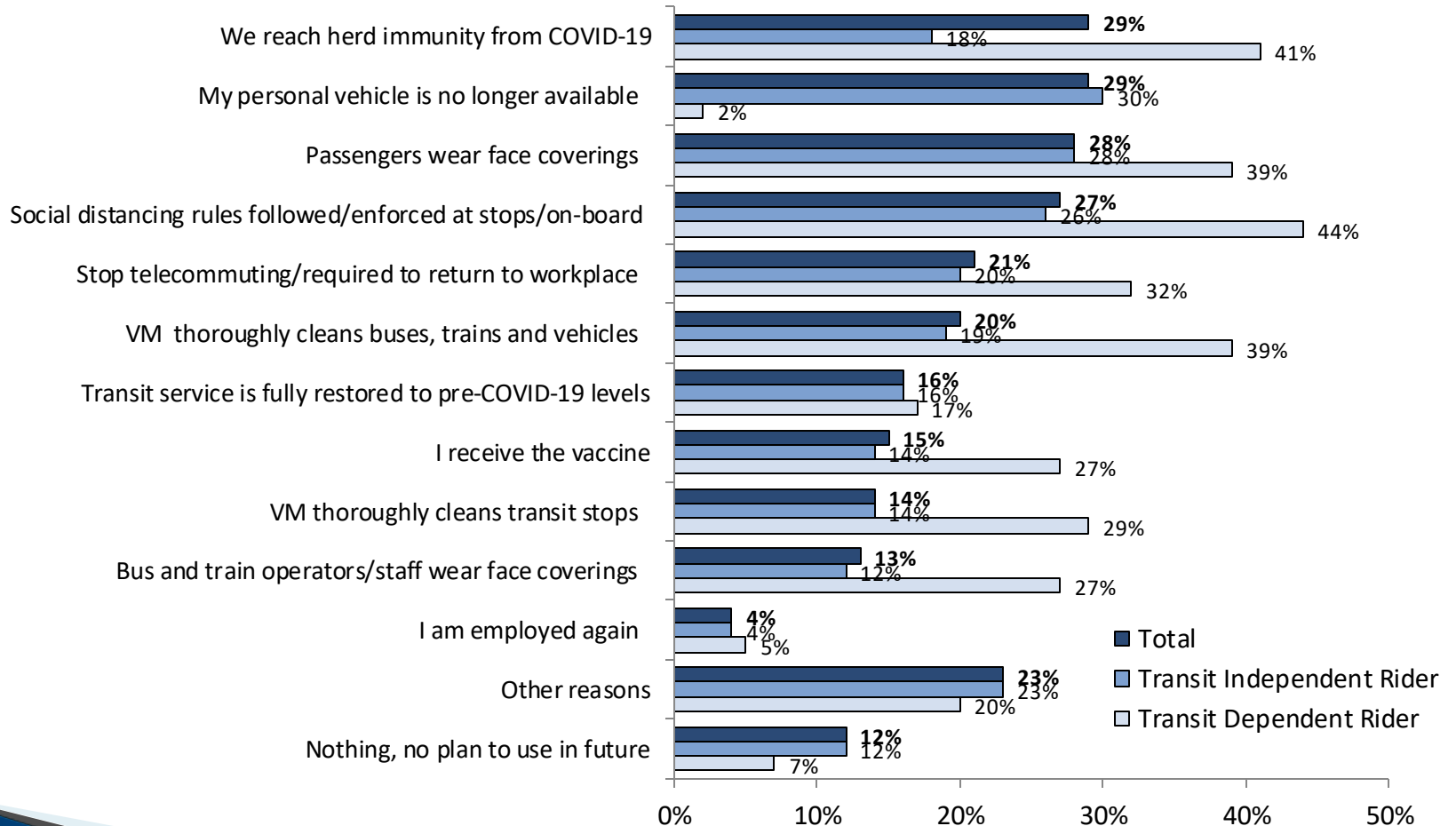
Q9: Which of the following need to happen for you to go back to using public transit at all, or with the same frequency as you did before the pandemic?

2021 Total n=760; 2020 Total n=708

Requirements to Return to Using Public Transit

Again, we see Dependent Riders were more likely to mention COVID-19 related requirements while Independent Riders were more likely to mention *no longer having their personal vehicle* as a requirement to return to using public transit.

Among Former Riders

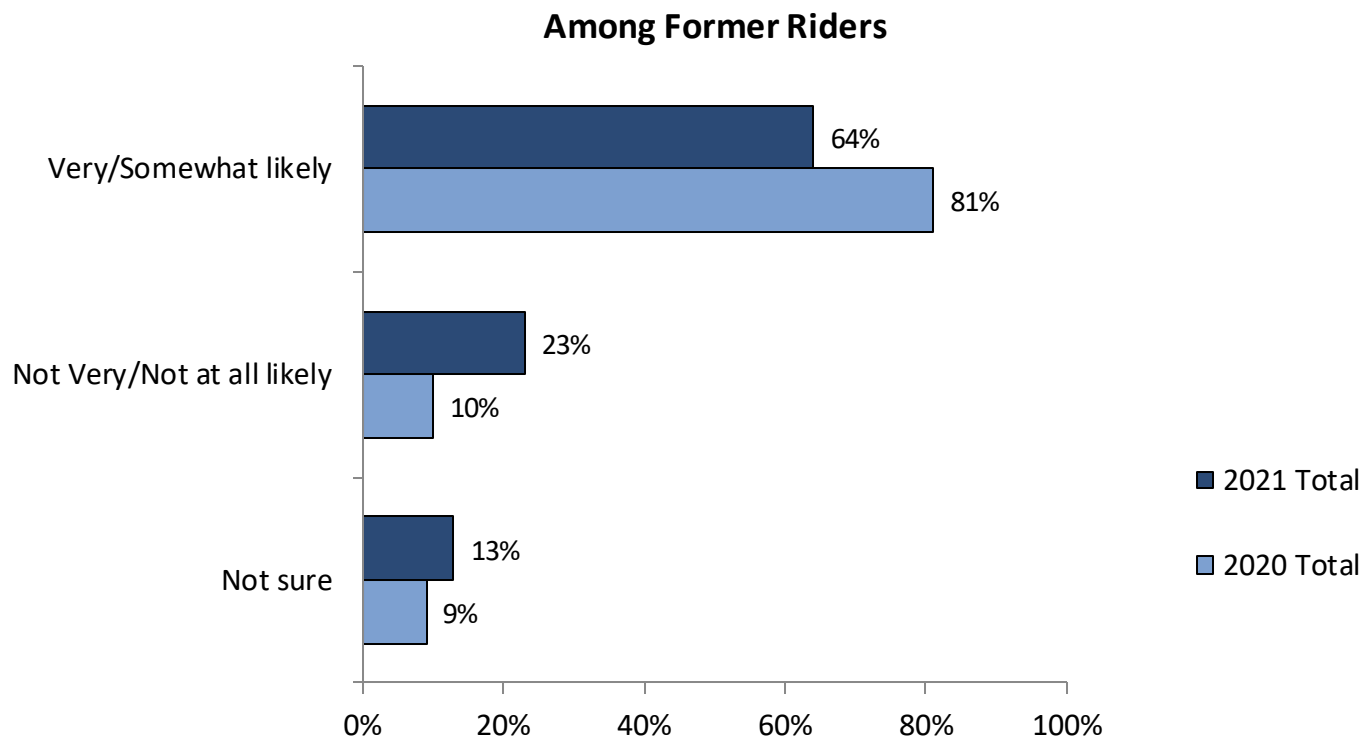


Q9: Which of the following need to happen for you to go back to using public transit at all, or with the same frequency as you did before the pandemic?

Total n=760 Transit Independent Rider n=709 Transit Dependent Rider n=41

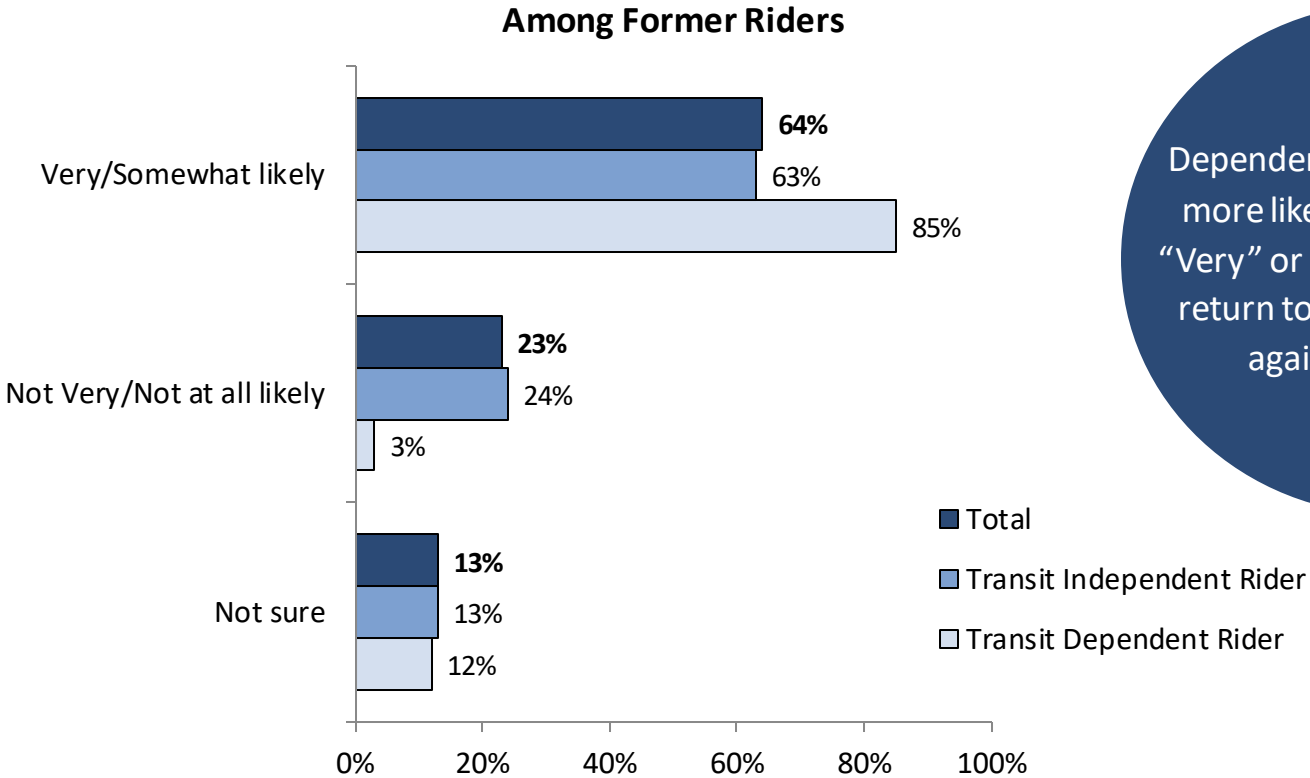
Likelihood to Use Public Transit in Future 2021 vs. 2020

Overall, approximately two-thirds of former riders (64%) reported they were “Very” or “Somewhat” likely to use public transit again in the future, which is a smaller percentage than what was reported in 2020 but is most likely due to the larger portion of Independent Riders in this years study.



Q10: How likely are you to use public transit again in the future? Are you...
2021 Total n=760; 2020 Total n=708

Likelihood to Use Public Transit in Future

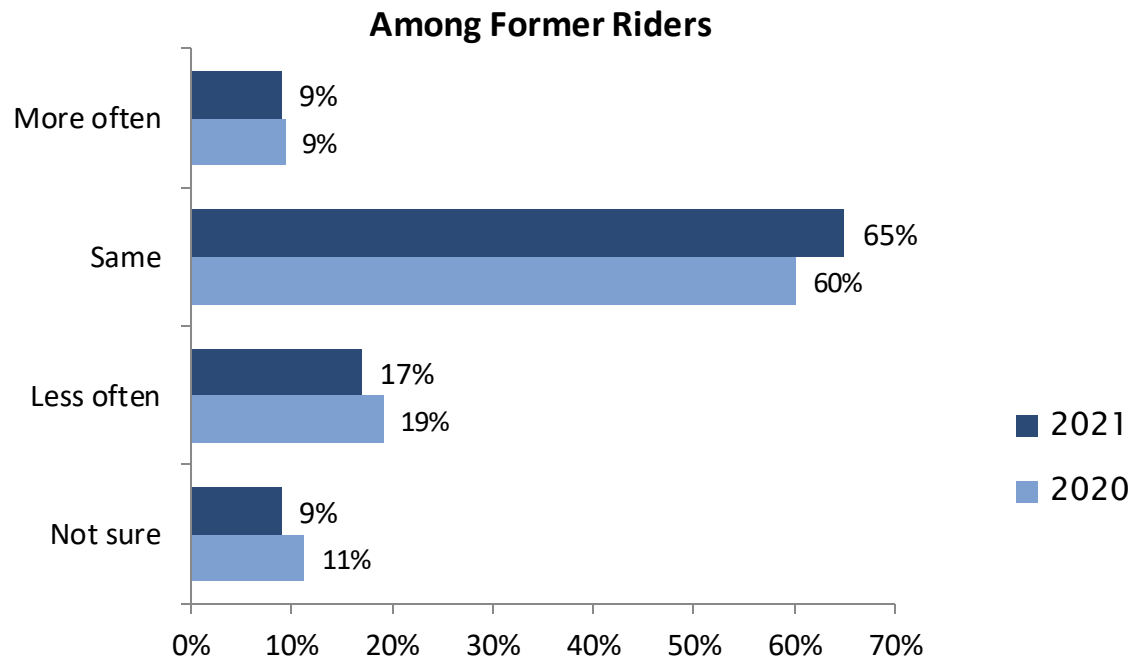


Dependent Riders were much more likely to say they were “Very” or “Somewhat” likely to return to using public transit again in the future.

Q10: How likely are you to use public transit again in the future? Are you...
 Total n=760 Transit Independent Rider n=709 Transit Dependent Rider n=41

Anticipation of Future Public Transit Usage – 2021 vs. 2020

Similar to last year, roughly two-thirds (65%) of the former riders who are likely to use public transit again in the future, report they will ride the same amount as before the pandemic. Another two in ten (17%) reported they will use it less often and one in ten (9%) say more often.



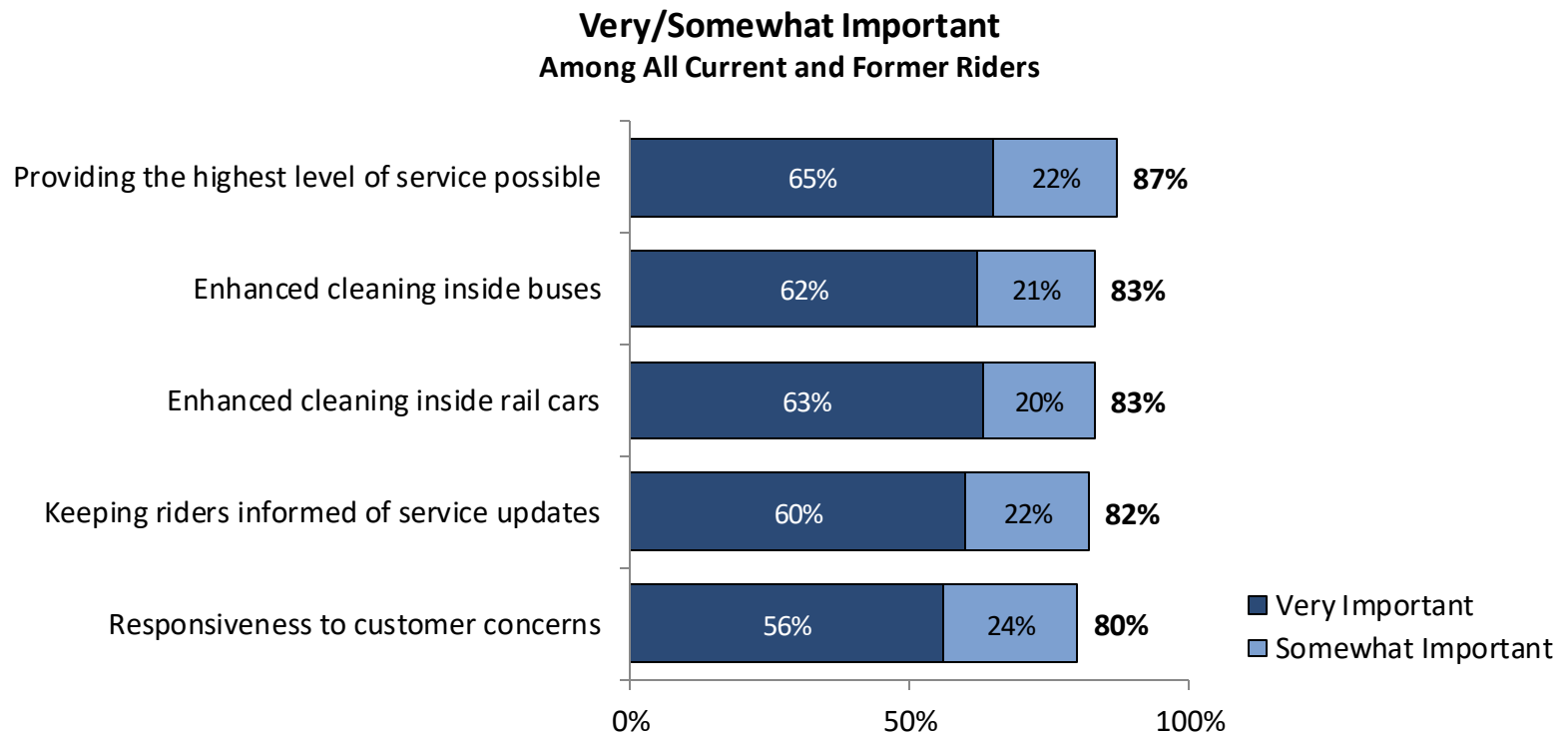
Q10A: Once you start using public transit again, do you think you will use it more or less often than before the pandemic, or about the same?
2021 n=485 2020 n=707

All Riders



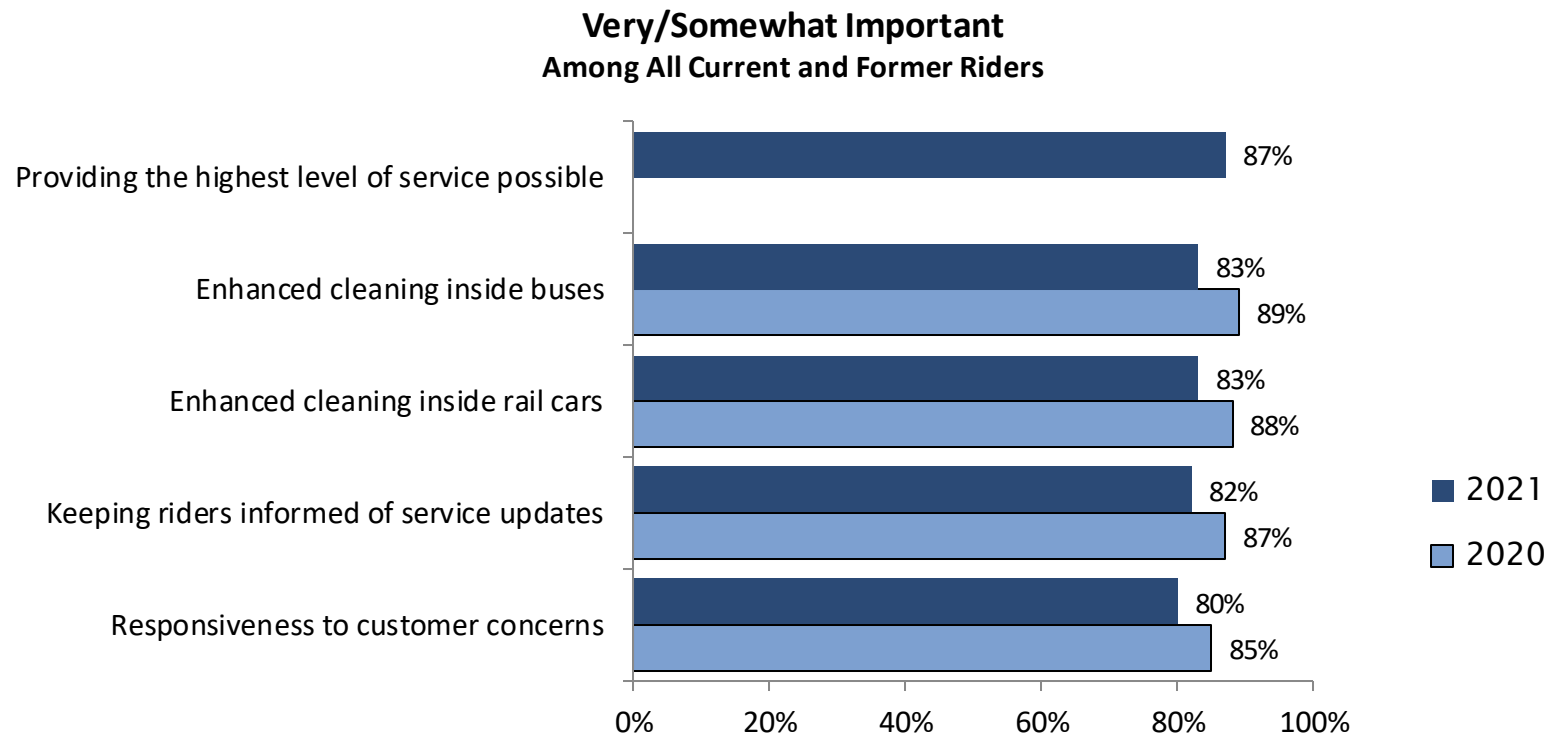
Importance of Efforts to Make Riders Feel Comfortable – 2021 Top 5

*Providing the highest level of service possible, enhanced cleaning inside buses and rail cars, keeping riders informed of service updates, and responsiveness to customer concerns rank as the top five most important ways Valley Metro can make riders feel comfortable using public transit in metro Phoenix now and in the future (80%-87% rated “very” or “somewhat important”). *Providing the highest level of service* ranked as most important among Dependents Riders (89%).*



Importance of Efforts to Make Riders Feel Comfortable – Top 5 2020 vs. 2021

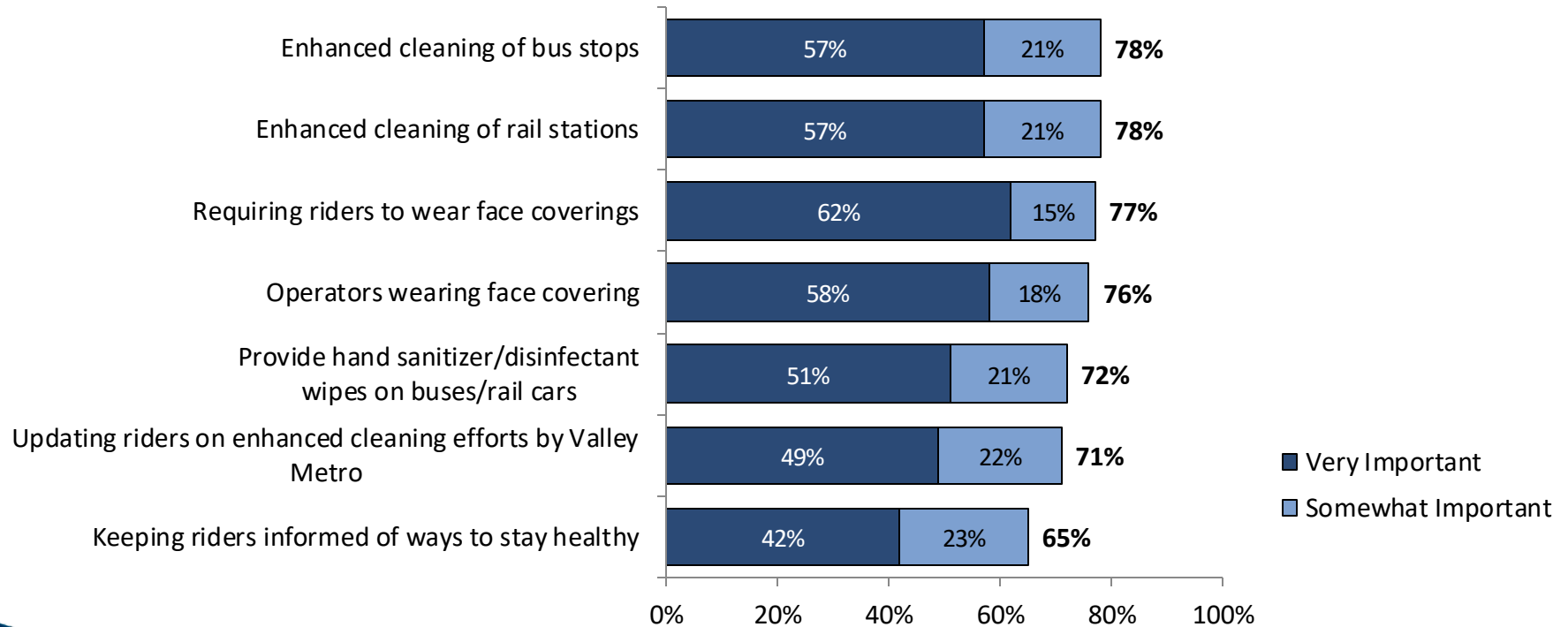
Importance levels in 2021 decreased significantly for each of the top ranked efforts compared to 2020 (80%-83% vs. 85%-89% in 2020). However, the rank order has remained the same for these top efforts with the exception of *providing the highest level of service possible* as it was added to the survey this year.



Importance of Efforts to Make Riders Feel Comfortable – 2021 Lower Tier

Approximately three-fourths of respondents felt it was “somewhat” or “very” important for Valley Metro to provide *enhanced cleaning of bus stops and rail stations* (78% each) and to *require riders and operators to wear face coverings* (76%-77%) to make them feel more comfortable using public transit now and in the future. Dependent Riders were more likely to rate each of these efforts as important than Independent Riders.

**Very/Somewhat Important Continued
Among All Current and Former Riders**



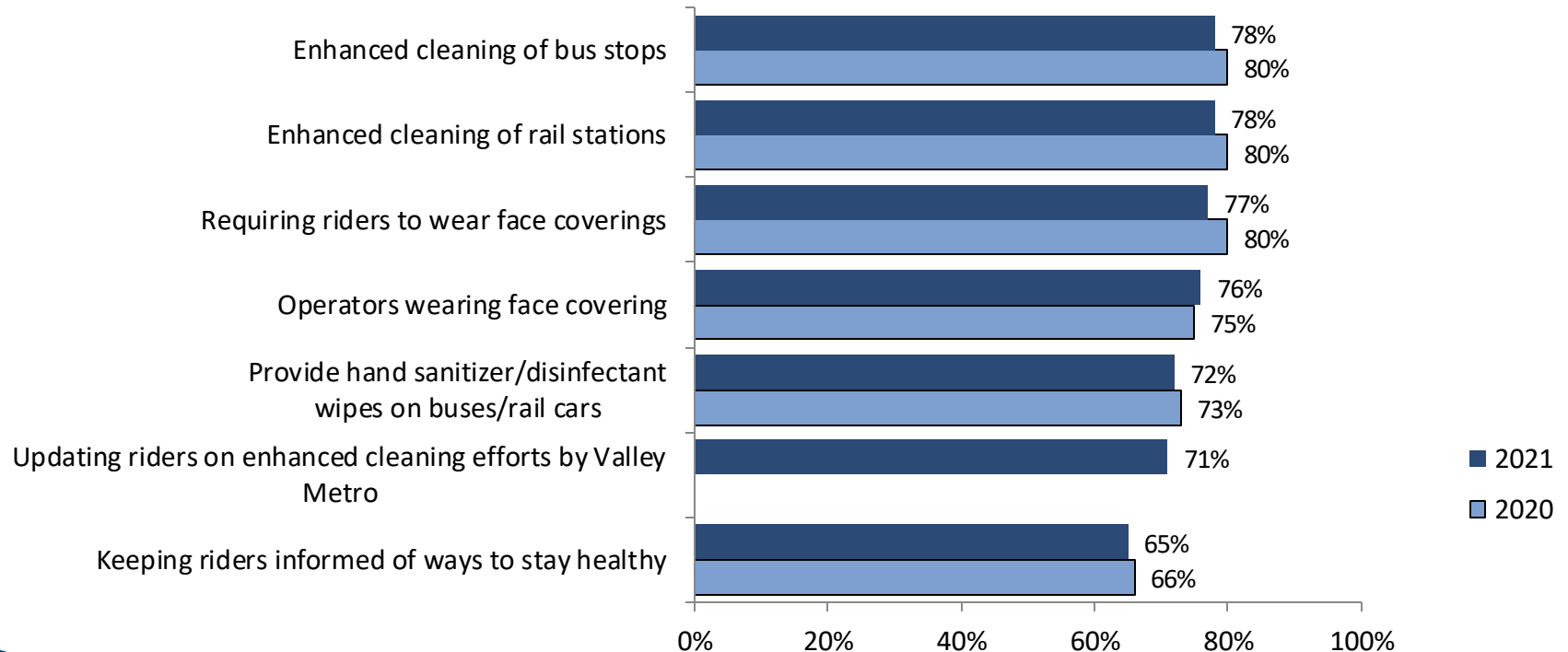
Q11: Please rate the importance of each of the following efforts by Valley Metro in making you feel more comfortable using public transit in metro Phoenix now and in the future.

Total n=2152

Importance of Efforts to Make Riders Feel Comfortable – 2020 vs. 2021

Importance levels in 2021 decreased slightly for each of the remaining efforts compared to 2020 (65%-78% vs. 66%-80% in 2020) with the exception of *operators wearing face coverings* which increased one percentage point. Again, the rank order has remained the same for these efforts with the exception of the newly added effort this year, *updating riders on enhanced cleaning efforts*.

**Very/Somewhat Important Continued
Among All Current and Former Riders**

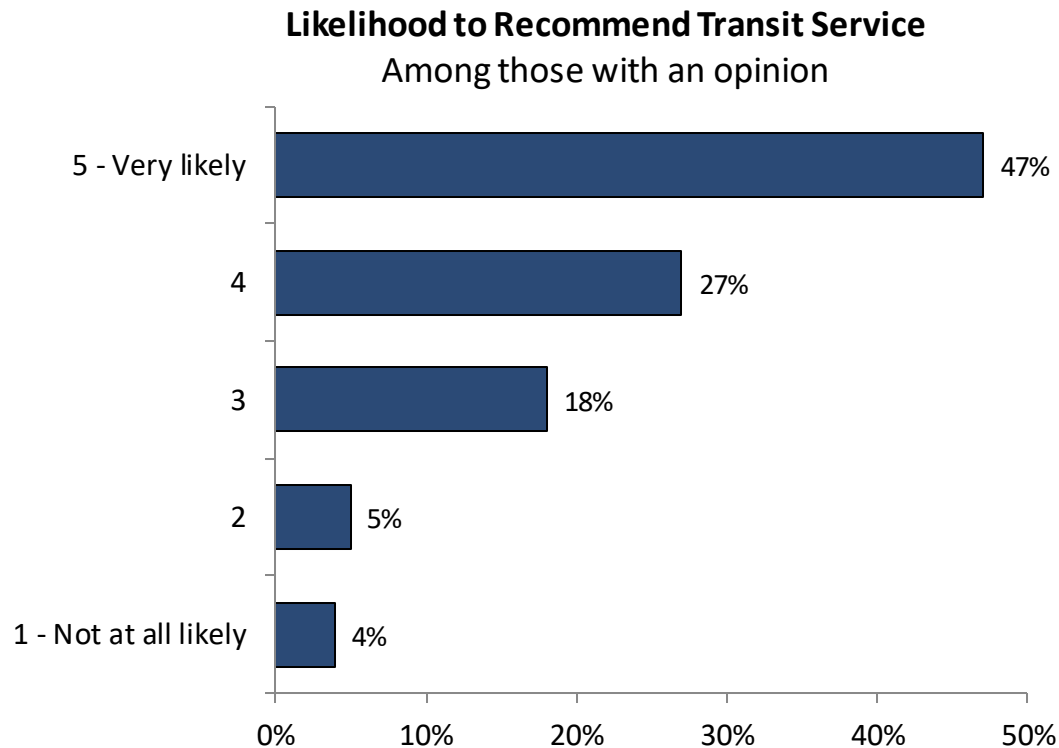


Q11: Please rate the importance of each of the following efforts by Valley Metro in making you feel more comfortable using public transit in metro Phoenix now and in the future.

Total n=2152

Likelihood to Recommend Transit Service in the Valley

Three-quarters of respondents reported they were likely (4/5 – Very likely) to recommend the transit service in the Valley to other people. Dependent Riders were significantly more likely to say they'd recommend the transit service compared to Independent Riders (78% vs. 72%).

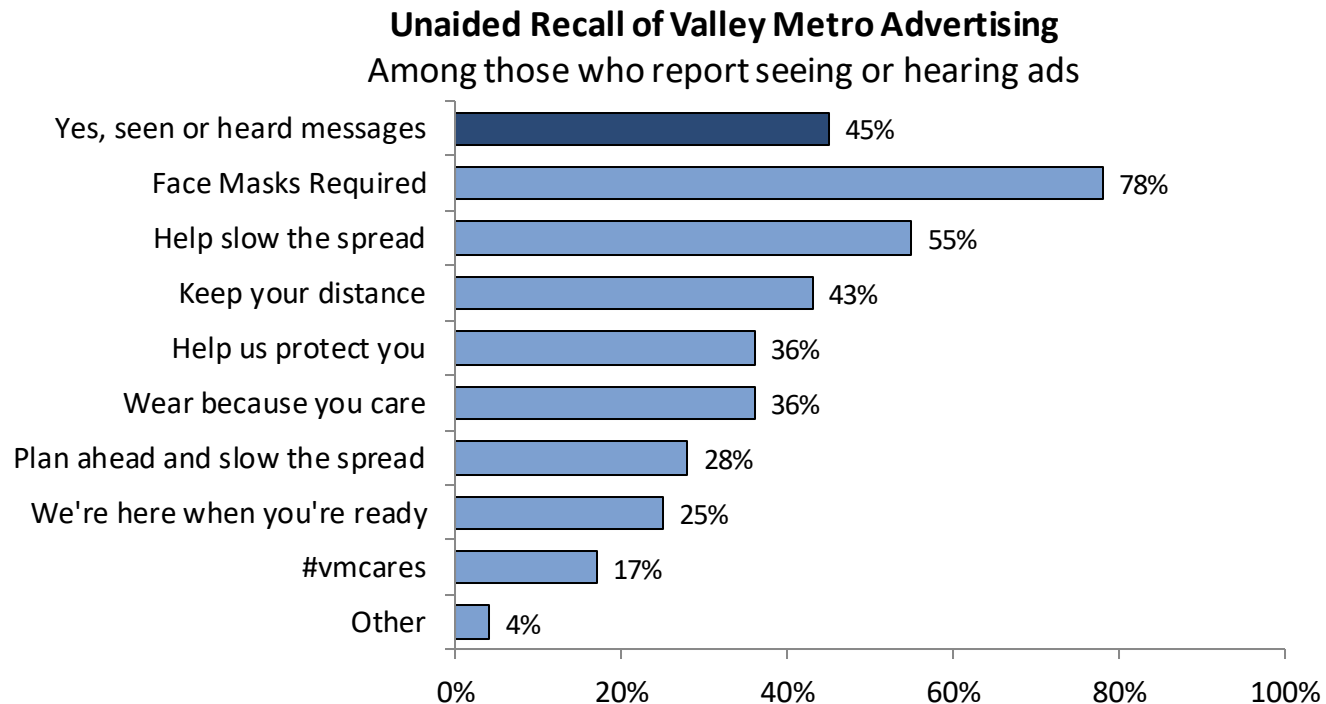


NEWA. How likely are you to recommend the transit service in the Valley to other people? 1 to 5 scale where 1 means "Not at all likely" and 5 means "Very likely"..
Total n=2069

Recall of Valley Metro Advertising

Just under one-half of all respondents reported seeing or hearing advertising messages about Valley Metro. Of those respondents, nearly eight in ten (78%) recall hearing or seeing *Face Masks Required* as the messaging. Other most recalled messages include *Help slow the spread* (55%) and *Keep your distance* (43%).

Dependent Riders were significantly more likely to recall the top six messages compared to Independent Riders (36%-91% vs. 24%-72% Independent).



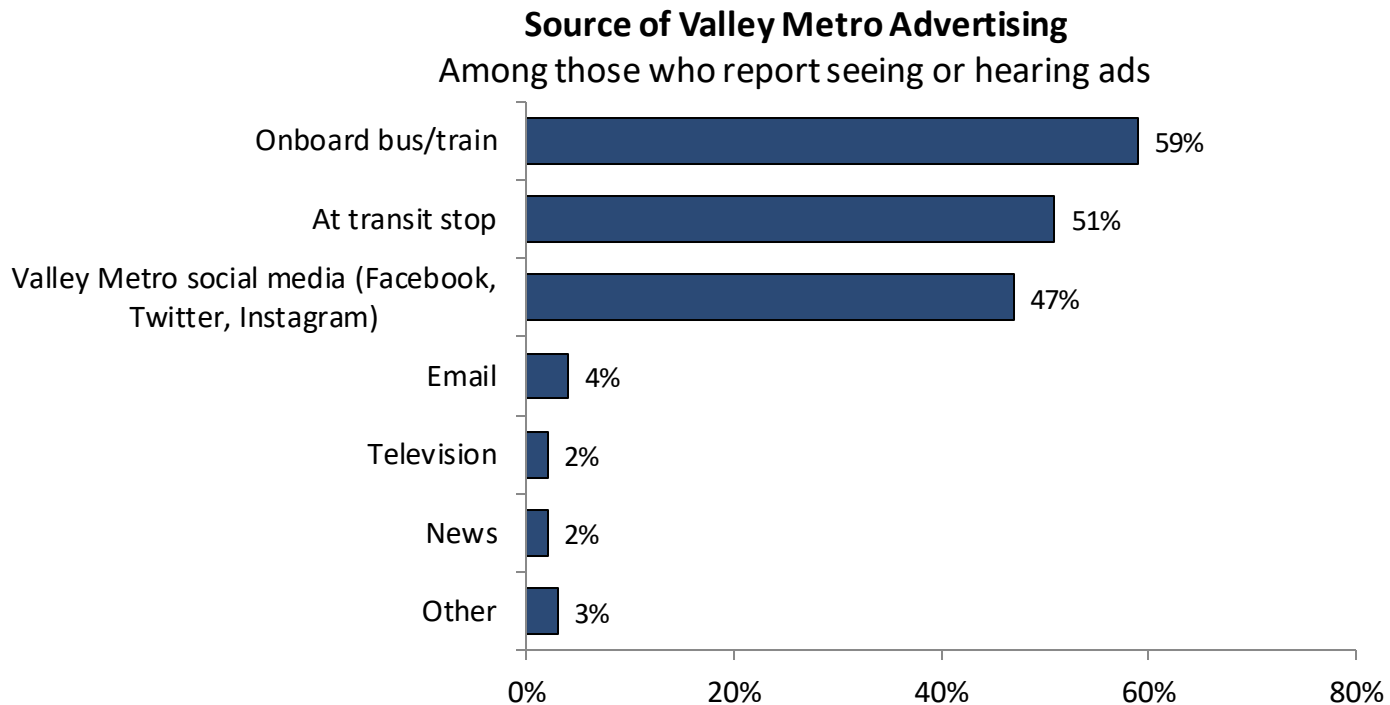
NEW12-1: Thinking only of advertising or messaging for Valley Metro in the past year, do you recall seeing or hearing any messages about Valley Metro? Total n=2150

NEW12-2. IF YES IN Q12-1: What are the messages you have seen or heard about Valley Metro n=977

Recall of Valley Metro Advertising

Of those who recall seeing or hearing Valley Metro messages, six in ten reported noticing these messages onboard buses or trains (59%) while another one-half mentioned transit stops (51%) and Valley Metro social media (49%) as the sources.

Dependent Riders were much more likely to mention seeing messages onboard buses and trains or at the transit stops compared to Independent Riders.

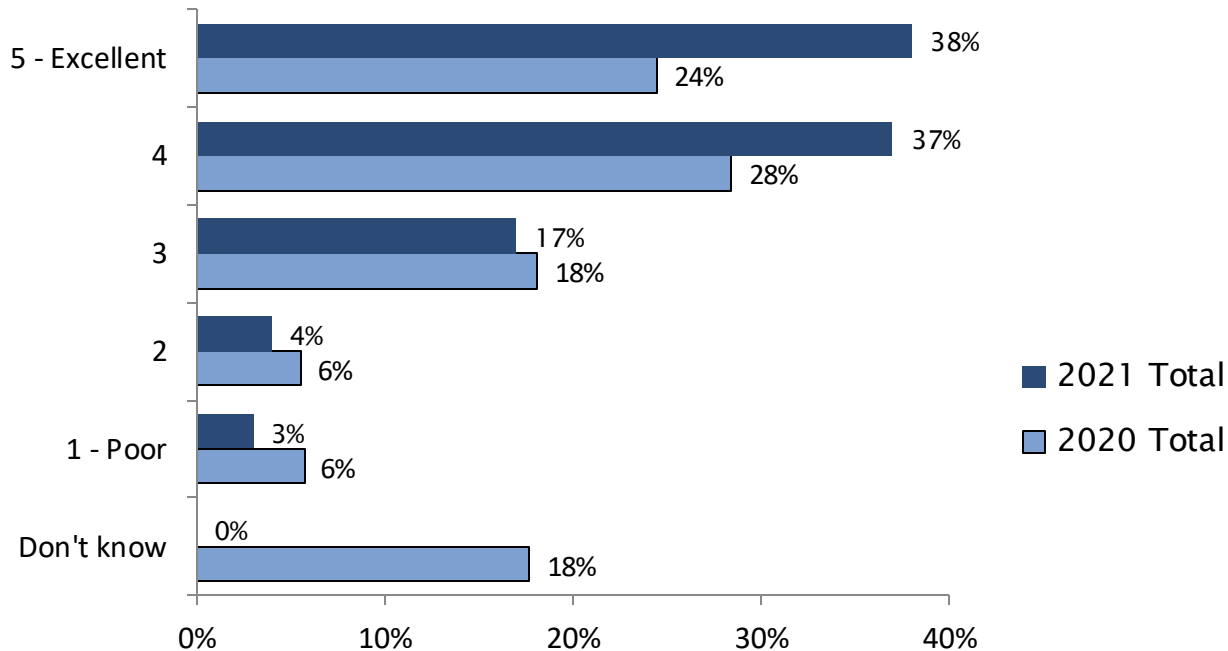


NEW 12-3 IF YES IN Q12-1: Where did you see or hear the advertising and messaging about Valley Metro? SELECT ALL THAT APPLY n=976

Safety and Security Ratings Amid COVID-19 – 2021 vs. 2020

Three-fourths of respondents (75%) provided Valley Metro with ratings of “4” or “5 – Excellent” on behalf of its efforts to keep riders safe and secure since the start of the pandemic. This is a significant increase from the 52% who provided the same ratings in 2020. This shift is evidence that Valley Metro’s focus on rider safety since the start of the pandemic is being noticed.

Among All Current and Former Riders



Q12A: Based on what you have seen or heard, please rate Valley Metro on its efforts to keep riders safe and secure since the start of the COVID-19 Pandemic?
2021 n=1806; 2020 n=1435

Ways Valley Metro can Make Passengers Feel Safe Amid COVID-19

The top ways Valley Metro can make passengers feel safe and secure riding public transit is to provide *more security/police, require masks, and to provide information on cleaning procedures.*

Valley Metro Actions	2021 Total n=2145	2020 Total n=1425
More security/police/make it safer/enforce the rules	20%	10%
Require masks/masks for drivers/passengers	17%	35%
Nothing/it works fine/no problems	17%	11%
Information on steps being taken to keep buses and trains clean	16%	20%
Keep transient/people under the influence away from stops and light rails	7%	6%
Require Social distancing/enforce social distancing	6%	11%
Covid 19 needs to be under control/government says it's safe	4%	4%
Better trained/courteous drivers/security personal (adhere to policies/procedures)	4%	1%
Sanitizing stations on the bus/bus stops/disinfect wipes on the train	3%	5%
More frequent buses/increased frequency for rider limit	2%	4%
More communication on what's new/Covid updates	2%	4%
More inspectors checking for passes on the light rail/too many people riding light rail for free	2%	3%
Visuals or audio about Covid procedures on the bus/at bus stops	2%	1%
Expand routes	2%	-
Bus needs to be on time/long wait time	1%	1%
Following CDC guidelines/safety rules	1%	-
Allow us to decide on wearing masks/don't force it	1%	-
Other	8%	7%
Don't know	14%	11%

All responses less than 1% in 2021 were grouped together in the "other" category

Q12B: What, if anything, would you need to see or hear from Valley Metro to make you feel safe and secure riding public transit now and in the future?

Suggested Improvements for Valley Metro

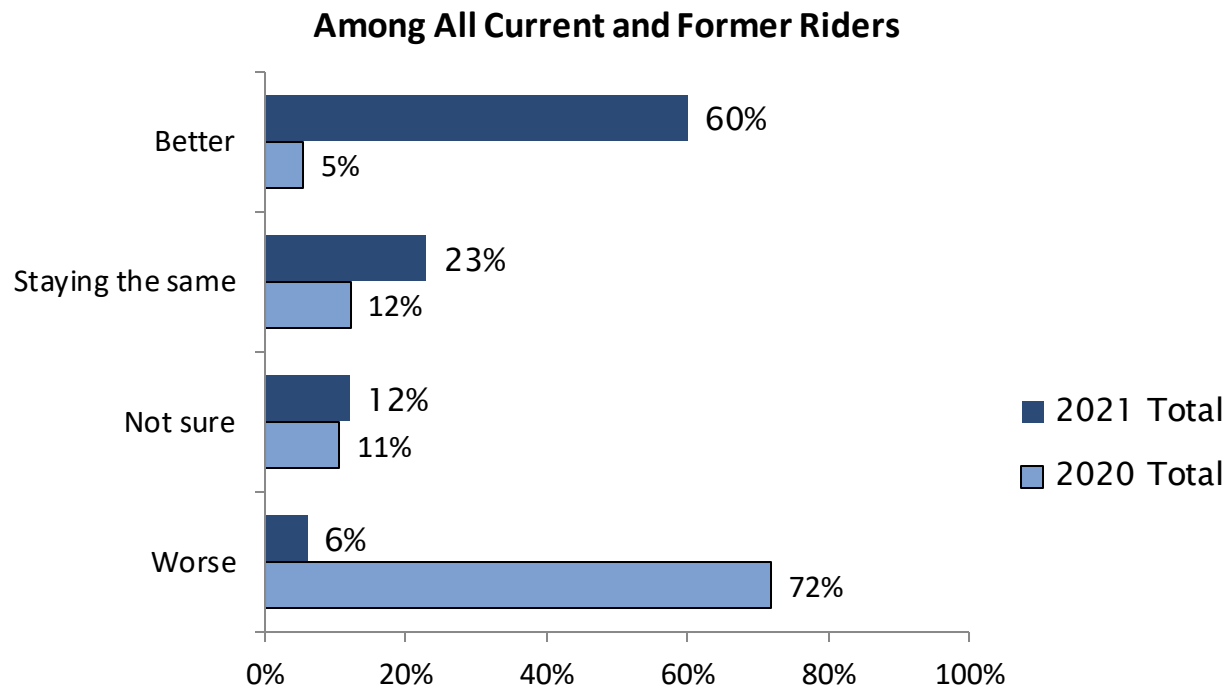
The top suggested overall improvements to the transit experience by Valley Metro were to make it more safe/secure, cleanliness on buses/ trains/transit stops, and to increase the frequency of the buses/trains. Another 13% report there is nothing to improve.

Other Primary Reasons	2021 Total n=2144	2020 Total n=1408
Make it more safer/more security	15%	15%
Nothing to improve/it works for me//no problems	13%	11%
Cleanliness/Cleaner busses/trains/bus stops	12%	16%
Increase the frequency of the busses and light rail	7%	7%
Make it mandatory to wear masks	5%	12%
Keep transient/people under the influence away from stops and light rails	5%	3%
Expand/increase more routes/stops (unspecified)	5%	3%
Better trained/courteous drivers/security personal (adhere to policies/procedures)	4%	5%
Buses need to be on time more	4%	5%
More communication on what's new/keep the community informed of covid updates	3%	4%
More inspectors checking for passes on the light rail	2%	3%
Provide hand sanitizers/wipes on busses/trains	2%	2%
Expand the light rail/more routes/stops	2%	-
Expand/more bus routes/stops	2%	-
Other	24%	15%
Don't know	16%	12%

All responses less than 2% in 2021 were grouped together in the "other" category
 Q13: Overall, what could Valley Metro change to improve the transit experience for all of its riders?

Opinions of COVID-19 Pandemic Situation

A majority of survey respondents feel the coronavirus situation is getting “better” in the Phoenix area which is a significant shift from the perspective in May of 2020. Independent Riders were significantly more likely to report they feel the situation is getting “better” (63% vs. 52%) while Dependent Riders were more likely to be unsure of the situation (16% vs. 10%).



Q14: In your opinion, is the coronavirus situation in metro Phoenix getting better, getting worse, staying the same or are you not sure?
2021 Total n=2145; 2020 Total n=1405

Contact

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