



PEPIN HUGUNIN
& ASSOCIATES

Minnesota Department of Transportation
Greater Minnesota Transit Investment Plan
2010 On-Board Survey Tech Memo

Revised August 4, 2010
Revised August 25, 2010

PEPIN HUGUNIN & ASSOCIATES

info@pepinhugunin.com
651-430-3515 office
651-491-1981 cell
www.pepinhugunin.com

10775 Kimbro Ave. Ct. N.
Stillwater, MN 55082

Table of Contents

I. Introduction and Objectives	2
A. Project Background	2
B. Project Objectives	2
C. Market Research and On-Board Surveys	2
D. About This Report	3
II. Executive Summary of Findings	5
III. Statewide Results	8
A. Respondent Profile by Transit System Type	8
B. Respondent Demographics	11
C. Respondent Attributes	14
D. Transit Behaviors	19
E. Attitudes and Opinions	22
IV. Differential Results by Transit System Type	25
A. Large Urban Fixed Route System	25
B. Large Urban ADA System	26
C. Small Urban System	28
D. Rural System	29
E. Incidence of Disabled Veterans by Transit System Type	30
V. Other Significant Differentials	31
A. Differentials Among Demographic Groups	31
B. Differential Attitudes and Opinions	32

I. Introduction and Objectives

A. Project Background

Public transportation needs around the state of Minnesota are growing, along with Minnesota's overall population and its population of transit-dependent riders. Minnesota's varied public transportation systems—from private to public to municipal to non-profit, are growing to meet these needs. In 1990, 40 counties had some form of public transportation system; in 2009, the number of counties with public transportation systems rose to 80. Only four counties in greater Minnesota (outside of the Twin Cities Metropolitan Area) currently lack some form of public transportation service.

Transit provides an invaluable service to seniors, persons with disabilities and people without cars, among others. Availability of transit also has environmental, health and economic benefits for not only those who use transit, but also for the greater community. Transit service need, measured in vehicle hours of service, is rising and demographic trends in Greater Minnesota indicate that this need will only increase over the next 20 years. The Greater Minnesota Transit Plan 2010-2030 found that by 2030 an estimated 1.7 million annual service hours will be required to meet demand for transit services in Greater Minnesota.

Mn/DOT is now undertaking the development of a Transit Investment Plan, as required by the state legislature.

B. Project Objectives

The Transit Needs Implementation Plan is being conducted by Mn/DOT's Office of Transit (OT) staff. The project objectives are as follows:

1. Engage and educate stakeholders and the general public about the Plan development.
2. Gather information on transit service and transit investment needs through market research and public input.
3. Identify investment needs required to achieve and satisfy transit goals as established in the Greater Minnesota Transit Plan 2010-2030.
4. Identify priorities for available funding.
5. Provide a plan for allocating unmet transit service needs at the county level taking into account the diversity of transit systems across Greater Minnesota.
6. Meet the intent of the legislative mandate.

C. Market Research and On-Board Surveys

1. Overview

Data on transit riders was gathered and used to better understand transit needs across Greater Minnesota, and represents a significant input to the larger planning process. These results will inform the technical analysis phase of the Transit Needs Implementation Plan in Task 5. For example, the current level of service and type of services will be evaluated on a countywide basis; and major gaps in service and unmet transit service demand will be identified using the market research findings.

2. Research Objectives

This market research study updates studies conducted in 1999 and 2000, and will help guide the transit service needs analysis at both a regional and statewide level. It is important to note that Mn/DOT is not anticipating results at the 'route specific' level; rather the information gathered will support guiding principles about what customers expect with respect to transit service.

3. Methodology

SRF and Pepin Hugunin & Associates created a quantitative onboard survey for use across the state. Much of the survey is designed to replicate and to update the 1999 and 2000 studies. The survey instrument was subject to review and approval by Mn/DOT.

The on-board surveys were executed (handed out and collected) by every public transit provider in Minnesota. These efforts included ensuring adequate representation from each economic development region. Surveys were made available in English and in alternative languages.

Emphasis was placed on surveying a representative sample of ridership composition. To accomplish this, everyone who rides the bus during a representative week on a 5307 funded bus was invited to take the survey. All routes/services were sampled, and all times of day and days of week were sampled. For 5311 transit systems, the typical weekly volume of customers made a blanket sample infeasible. Instead, transit systems chose a single weekday and a single weekend day and sampled all routes and services during those two days.

4. Lessons Learned

Survey Timing

- Montevideo was experiencing flooding during on-board surveys, a factor that may have impacted ridership on this system and in this area.
- Colleges/universities have spring break during March and it was difficult to find a week that did not conflict with any break schedules statewide.

Transit System Buy-In

- Transit systems conduct their own surveys; some complained of responder fatigue in asking their customers to complete two similar surveys within a close timeframe. Allowing the transit systems as much advance notice as possible of an upcoming survey effort would help them better plan ahead.
- Different kinds of systems present different challenges. For example, fixed route systems with large customer volumes have a harder time managing logistics such as providing writing utensils, clipboards, collecting, etc. Smaller systems may have issues of anonymity; with few riders on the bus responders need to know the driver won't be able to identify them with their survey responses. In the future, Mn/DOT should consider discussing these types of logistics with a handful of providers before sending out the survey instructions to all of the systems.

D. About This Report

The report begins with an executive summary of findings. The statewide survey results are then presented, followed by an analysis of the report differentials.

1. Statewide Results

The main body of the report first presents the results in the aggregate—that is, for all 64 transit systems that returned valid responses. These results are organized as follows:

1. Respondent Profile by Transit System Type
2. Demographic Profile of Respondents
3. Additional Respondent Attributes
4. Transit Behaviors
5. Attitudes and Opinions Concerning Transit Service

2. Differential Results

The report then focuses on the significant differences among various sub-groups:

1. Differential Results by Transit System Type
2. Differentials Among Demographic Groups
3. Differential Attitudes and Opinions

3. Interpreting the Report

The results of the survey are shown primarily in a series of charts and tables. In all charts and tables, except with two exceptions, **n = the number of respondents** who answered **that question**. This number varies from a high of 11,022, which is the total number of completed surveys received, to a low of 9,802 who indicated their household income.

Results are reported as percentages rather than in raw numbers, as percentages are assumed to be more meaningful to those who read and interpret this report. The percentages in the charts represent **the percentage of people who answered that question** (indicated as n in each of the charts) not the total number of respondents. The exceptions to this are **questions 1 and 2** where there were more than 11,022 responses, as about 10 percent of respondents marked more than one response and the multiple responses were accepted and tabulated. There the n = the total number of **responses** and the percentages **represent the percentage of the total number of responses**.

II. Executive Summary of Findings

A. Respondent Profile

1. The Greater Minnesota Transit Survey, conducted in March and April 2010, yielded a total of 11,022 valid responses from riders of 64 transit systems. More than half of the respondents represent Large Urban Fixed Route transit service, and about one-third represent Rural services for a total of more than 90 percent from these two transit system types. 8 percent represent Small Urban and 1 percent Large Urban ADA services. Differences among the four transit system types are significant, and are discussed in section IV of this report and section D of this Executive Summary.
2. 87 percent of respondents are between the ages of 18 and 64. 60 percent are female and 40 percent male. Respondents 65 years of age or older are 76 percent female.
3. 62 percent of respondents are in the lowest category of household income provided as a structured response, that being less than \$20,000.
4. English is the first language for 93 percent of respondents.
5. 79 percent of respondents are white. African-American, Native American, Asian and Hispanic/Latino respondents range from 6.4 to 2.7 percent of the sample.
6. 51 percent of respondents do not have a Driver's License.
7. 80 percent report having no impairment or disability that would require any assistance in riding transit.
8. 4 percent of respondents are disabled veterans. 13.6 percent of respondents from Large Urban ADA services are disabled veterans, while the percent of respondents who are disabled veterans from the other transit system types range from 3.4 percent (Large Urban Fixed Route) to 4.4 percent Rural Routes.

B. Transit Behaviors

1. One-third of respondents were riding to work and one in five to school, for a total of 53 percent for these two most common destinations. 17 percent were en route to shopping, 13 percent to a medical appointment and 8 to a social engagement.
2. 53 percent (combined) were riding transit because they do not have a car or they do not drive. (Recall that 51 percent do not have a Driver's License.) Another 4 percent don't like to drive.
3. 14 percent were riding transit because it saves money, 8 percent because it saves time and 6 percent because it saves the environment.
4. More than half ride transit at least five days a week, and 86 percent ride at least twice a week.
5. One in three has been using the service for five years or more, and another 40 percent for at least one year.

C. Attitudes and Opinions

1. 69 percent are Very Satisfied with their transit service. 27 percent are Somewhat Satisfied. 4 percent are Not Very Satisfied or Not Satisfied At All.
2. Respondents were asked “What percentage of your transportation needs are served by the bus?” The average response across all respondents is 67.7 percent.
3. When asked what changes to their transit service would be most valuable, 7 in 10 wanted an expansion of the times at which transit service is available. One in three respondents want longer hours of service. 23 percent want more frequent service within the time that it is available (less waiting time). 13 percent want service on more days. 3 in 10 want something other than an expansion of the times at which transit service is available. 17 percent want cheaper fares, and 13 percent want service to more areas. It is not clear whether this means more places of origination or more destinations.
4. Preferences among media for receiving information about transit are widely varied. 21 percent prefer Direct Mail, 19 percent prefer a transit Web site and 17 percent prefer Flyers and/or Newsletters. 13 percent prefer Newspapers, 12 percent E-Mail, and 9 percent each Radio and Television.

D. Differentials by Transit System Type

1. Respondents from none of the four transit system types resemble the foregoing statewide aggregate.
 - Riders of Large Urban Route service are younger, more likely to ride to work or school, ride more frequently, and do so on a more discretionary basis—i.e. they are more likely to have a car and a Driver’s License. They are more likely to prefer receiving transit information via a transit Web site or via email.
 - Riders of Large Urban ADA service are much older, more likely to ride to medical appointments, ride less frequently, and are less likely to have a car and a Driver’s License. They are three times more likely than the statewide aggregate to report having an impairment and/or a need for assistance in riding transit. They report the highest percentage of transportation needs being met by their transit service (73.2 percent versus 67.7 percent). Their preferred transit enhancement is less waiting time, and they prefer to receive transit information via direct mail (53 percent versus 22.2 percent statewide).
 - Riders of Small Urban service are older, more likely to ride to shopping, ride less frequently, and are less likely to have a car and a Driver’s License. They resemble the statewide aggregate on most other dimensions.
 - Riders of Rural service are older but more likely to ride to work, but they ride less frequently. They are also more likely to ride to medical and shopping. They are less likely to have a car and a Driver’s License. They are more likely to prefer receiving transit information via direct mail (37.4 percent versus 22.2 percent statewide.)

E. Other Differentials

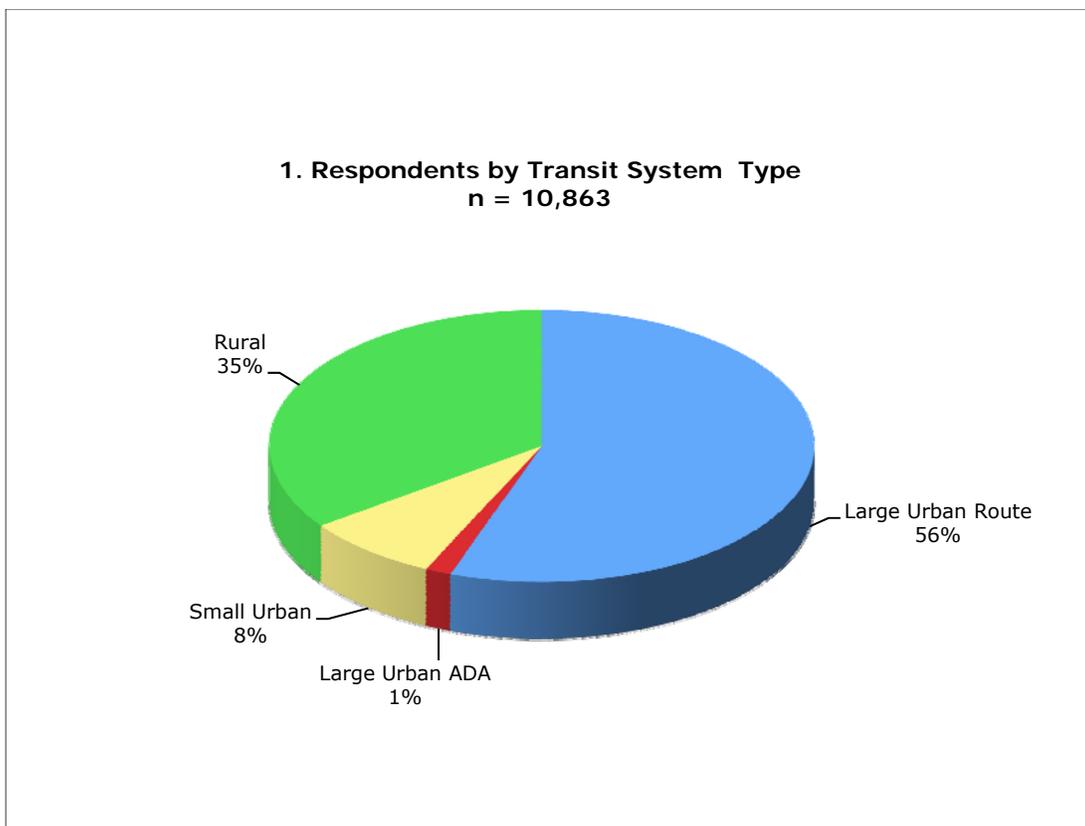
1. Riders under the age of 18 most likely ride to school and do so more than twice a week. They are more likely to want cheaper fares, but household income is highest for riders under 18 than for any age group.
2. Riders age 18-34 mostly ride to work or school, and 92 percent ride more than twice a week.
3. Riders age 35-64 mostly ride to work, and 90 percent ride more than twice a week. Almost half have ridden more than five years.

4. Riders age 65 and over are more likely to ride to shopping (33 percent) and medical (29.5 percent), and ride less frequently. More than 40 percent have ridden for five years or more. Ridership becomes less diverse with age, as females come to predominate. The percentage of African-American, Asian and Hispanic/Latino ridership also declines with age. Older riders are much more likely to report the need for assistance and to prefer receiving transit information via direct mail.
5. 7 percent of respondents reported that English is not their first language. 37 percent of those are Asian, 20 percent African-American and 18 percent Hispanic/Latino.
6. Those who report English as their second language are more likely to be riding to school, and more than 60 percent are age 18-34.
7. Riders age 65 and over are most likely to be very satisfied with their transit service (85 percent). African-Americans are least likely to be very satisfied (56 percent). Still, more than half of every sub-group says that it is very satisfied with their transit service.
8. The level of satisfaction with their transit service seems to be related to whether one has a car and/or a Driver's License. If not, and one has no other mobility option, then the level of satisfaction is generally higher. Those who have and who drive a car are more likely to compare their transit service to the mobility they experience with their car, and to find transit to be wanting. These are people who are more likely to report riding transit because it saves time or money.
9. A majority of most sub-groups prefer longer hours of service as the most valuable potential change to transit service. Only riders of Large Urban ADA services did not list it as one of their top two changes.
10. Most sub-groups rated less waiting time as their #2 change. Riders of Large Urban ADA services and those with household incomes greater than \$50,000 rated this as their #1 change.
11. Riders age 18 and under are most likely to want cheaper fares.
12. Riders age 65 and greater are most likely to want service on more days.
13. Asian respondents were most favorable (18 percent) to service to more areas.
14. A whopping 59 percent of riders of Large Urban ADA systems prefer to receive transit information via direct mail. 39 percent of riders age 65 and over also prefer direct mail.
15. Asian riders and riders with household incomes of \$50,000 or more are most likely to prefer digital media, including Web sites and e-mail.

III. Statewide Results

First, we present the results for all 64 transit systems who participated in the survey in the aggregate. It should be pointed out right at the outset of this report, however, that each of the four transit system types—Large Urban Fixed Route, Large Urban ADA, Small Urban and Rural—differ in significant ways from the aggregate results. The results by transit system type are presented in section IV beginning on page 24 of this report.

A. Respondent Profile by Transit System Type



The Greater Minnesota Transit Survey was conducted by 64 transit systems during the months of March and April 2010. A total of 11,022 valid responses was received. Of these, the transit system type was identified for 10,863 and a specific transit system for 10,849 (see below). A large majority of the responses came from riders of large urban route services, and **more than 90 percent in total from large urban fixed routes and rural transit systems**, taken together. Less than 10 percent represent small urban transit services, and only 1.4 percent represent ADA services.

Responses vary from a low of 4 from riders of the City of East Grand Forks Dial A Ride to a high of 2,194 from riders of the Duluth Transit Authority Regular Route service. Table 1 on the following page shows the number of survey participants by transit provider and peer group.

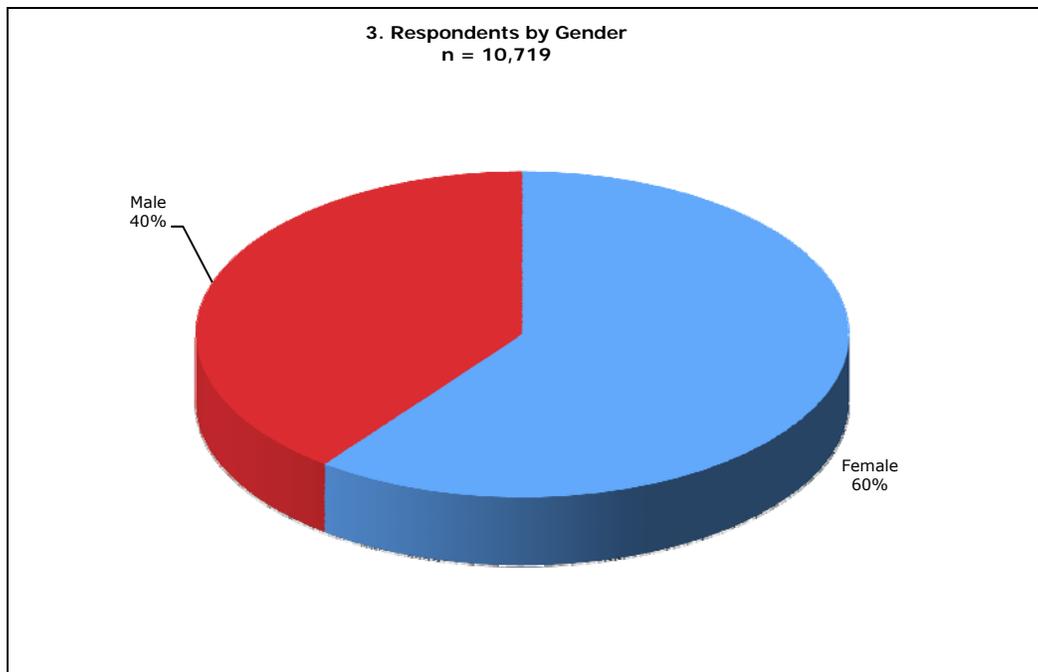
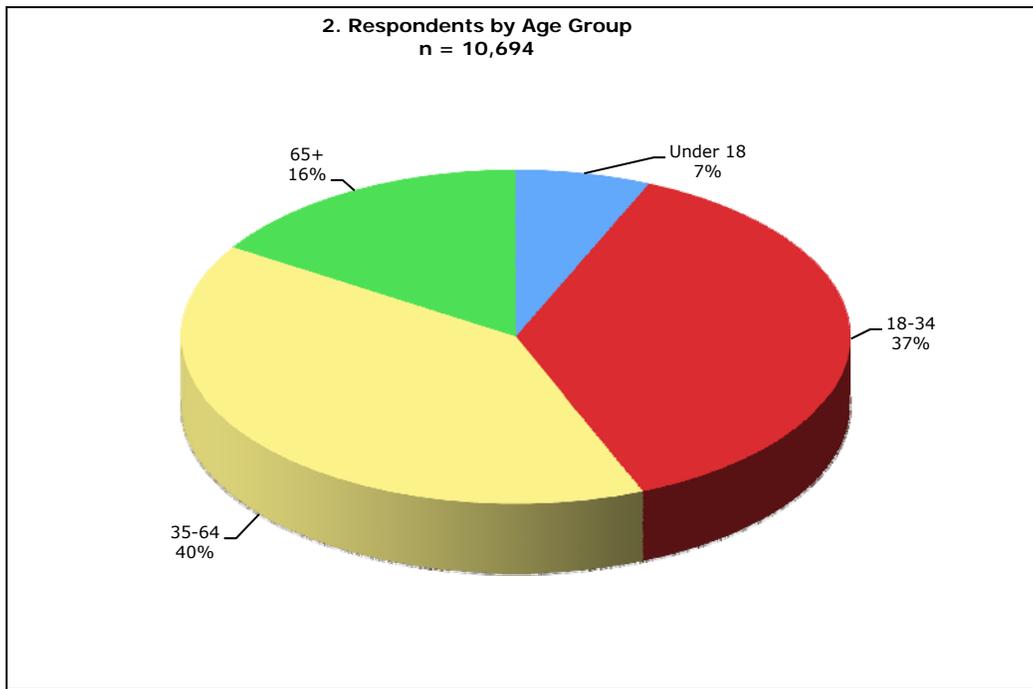
Table 1: Respondent Profile by Transit Provider

Peer Group	Transit Provider	Survey Participants
Large Urban ADA	City of East Grand Fords Dial A Ride	4
	City of Moorhead (DAR)	25
	City of Rochester DAR	43
	Duluth Transit Authority—STRIDE	63
	St. Cloud Metro Bus Dial-a-Ride	32
Large Urban ADA Sub-Total	5 systems	167
Large Urban Fixed Route	City of East Grand Forks Fixed Route	42
	City of LaCrescent	63
	City of Mankato	1,113
	City of Moorhead (RR)	269
	City of Rochester RR	1,616
	Duluth Transit Authority-Regular Route	2,194
	St. Cloud Metro Bus Fixed Route	717
Large Urban Fixed Route Sub-Total	7 systems	6,014
Small Urban	City of Benson	33
	City of Brainerd	43
	City of Dawson	31
	City of Faribault	57
	City of Fosston	44
	City of Granite Falls	57
	City of Hibbing	54
	City of LeSueur	20
	City of Montevideo	8
	City of Norris	125
	City of Northfield	101
	City of Pine River	31
	City of St. Peter	77
	City of Stewartville	9
City of Winona	183	
Small Urban Sub-Total	15 systems	873
Rural	AMCAT Joint Powers Board	153
	Arrowhead Economic Opportunity Agency	712
	Augustana	168

Peer Group	Transit Provider	Survey Participants	
Rural (Continued)	Becker County Transit	58	
	Brown County Family Services	137	
	Cedar Valley Services	31	
	Cottonwood County	32	
	Faribault County	48	
	Grant County Transportation	37	
	Hubbard County	126	
	Isanti County	160	
	Kandiyohi Area Transit Joint Powers Board	184	
	Lincoln County	19	
	Mahnomen County Human SsrVICES	13	
	Martin County	90	
	Murray County	11	
	Paul Bunyan Transit	77	
	Pipestone County	29	
	Prairie Five CAC, Inc.	105	
	Productive Alternatives, DBA Transit Alternatives	56	
	Rainbow Rider Transit Board	111	
	Red Lake Band of Chippewa Indians	29	
	Renville County	129	
	RiverRider Public Transit System	29	
	Rock County	86	
	Roseau County Committee on Aging	128	
	SEMCAC	33	
	Southwestern Minnesota Opportunity Council, Inc.	14	
	Steele County	64	
	Three Rivers Community Action	71	
	Timber Trail Public Transit, Inc.	93	
	Trailblazers Joint Powers Board	124	
	Tri-County Action Program	192	
	Tri-Valley Opportunity Council	164	
	Wadena County Social Services	76	
	Watonwan County	54	
	Western Community Action	153	
	Rural Sub-Total	38 systems	3,795

B. Respondent Demographics

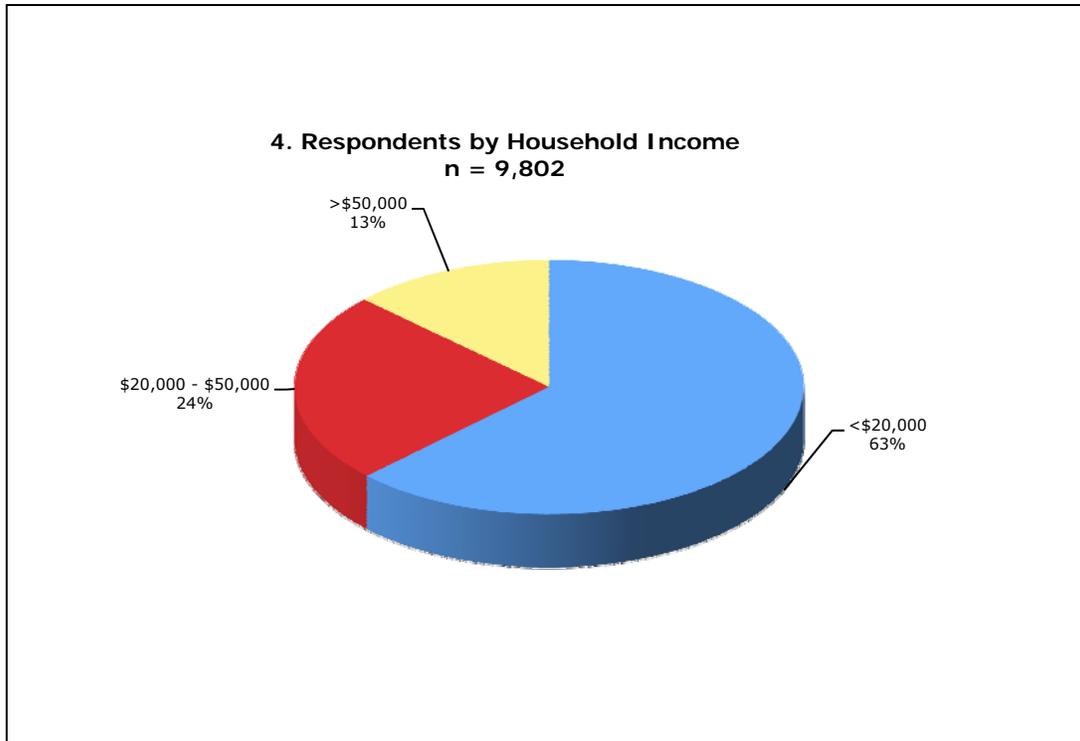
1. Age and Gender



77 percent of respondents are between the ages of 18 and 64, while 16 percent are older than that (65+) and 6.5 percent are younger. The respondents are about 60 percent female and 40 percent male.

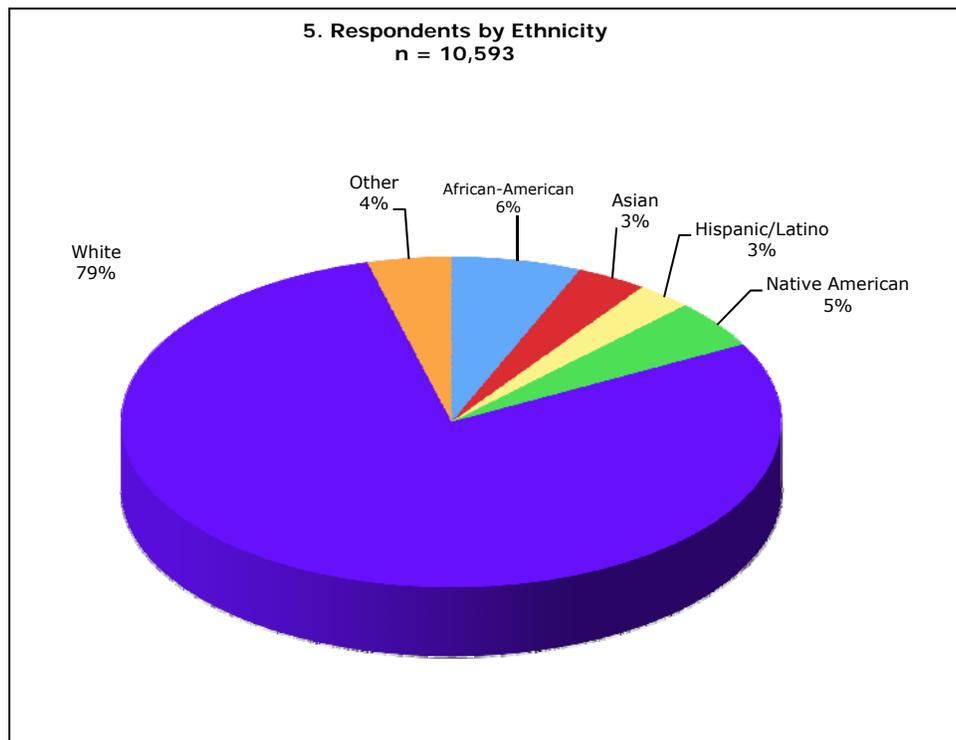
There are significant differentials in gender by age. Respondents under the age of 18 are 53 percent female and 47 percent male; respondents age 65+ are 76 percent female and 24 percent male.

2. Household Income



Survey respondents skew strongly toward lower income households with 63 percent of respondents representing households with income of less than \$20,000. An estimated one respondent in six has a household income above the Greater Minnesota average of about \$45,000. In other words, an estimated five of six is below the Greater Minnesota average for household income.

3. Ethnicity



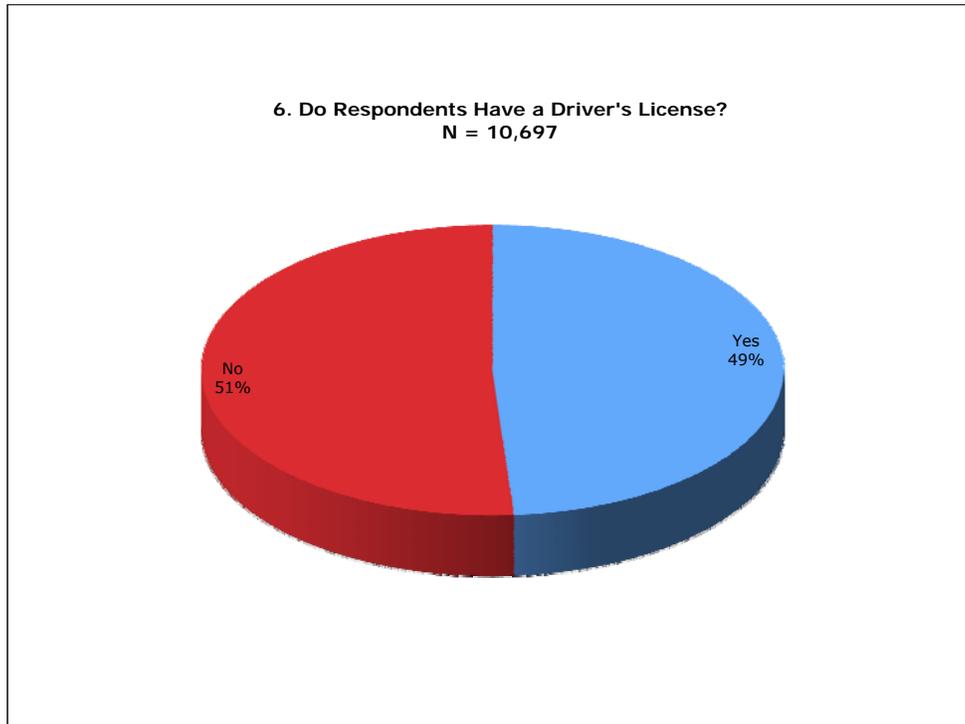
Meanwhile 79 percent of the respondents are white. African-American, Native American, Asian and Hispanic/Latino respondents range from a high of 6.4 percent to a low of 2.7 percent of the respondents, respectively.

The 79 percent of respondents who report being “white” compares to approximately 95 percent of the general population of Greater Minnesota. (A more complete comparison of ethnicity of respondents versus the general population of Greater Minnesota is not offered here because such data is not immediately available. Statewide and Metro estimates of population are prepared by the U.S. Census Bureau and by the Metropolitan Council periodically, but not necessarily for the same year. Greater Minnesota data can be estimated by subtracting Metro from Statewide data but, again, as these estimates do not represent the same year, the potential for errors in such estimates is significant.)

C. Respondent Attributes

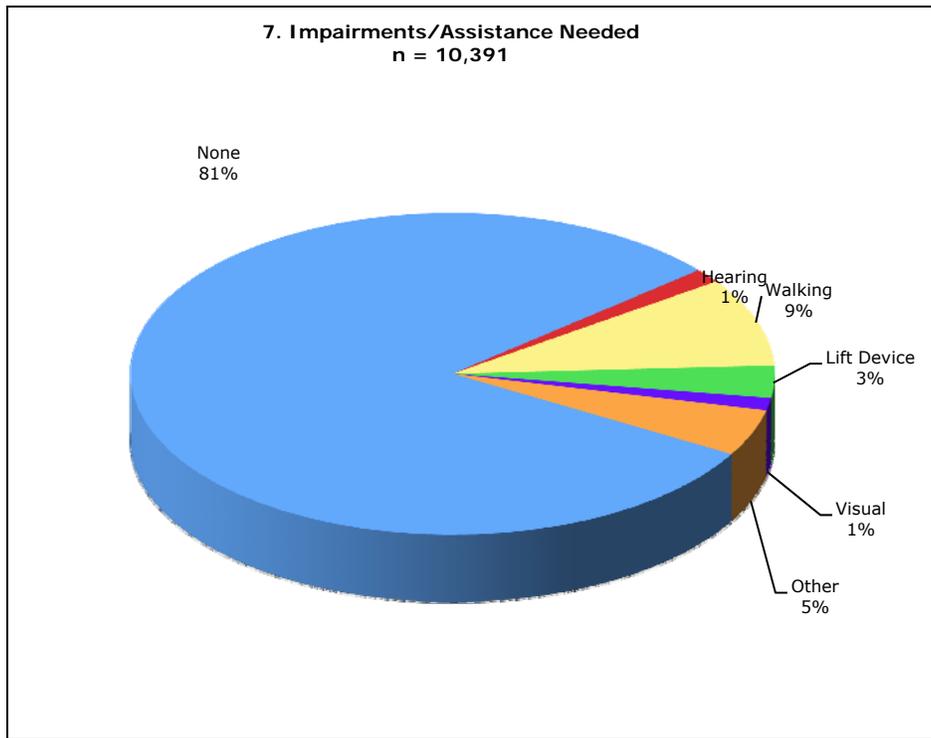
In addition to the demographic characteristics of age, gender, household income and ethnicity, certain additional personal attributes also were identified: Does the respondent have a driver's license, or not? Does the respondent have an impairment and/or require assistance when riding transit? Is English the respondent's first language, or not? Is the respondent a disabled veteran?

1. Driver's License



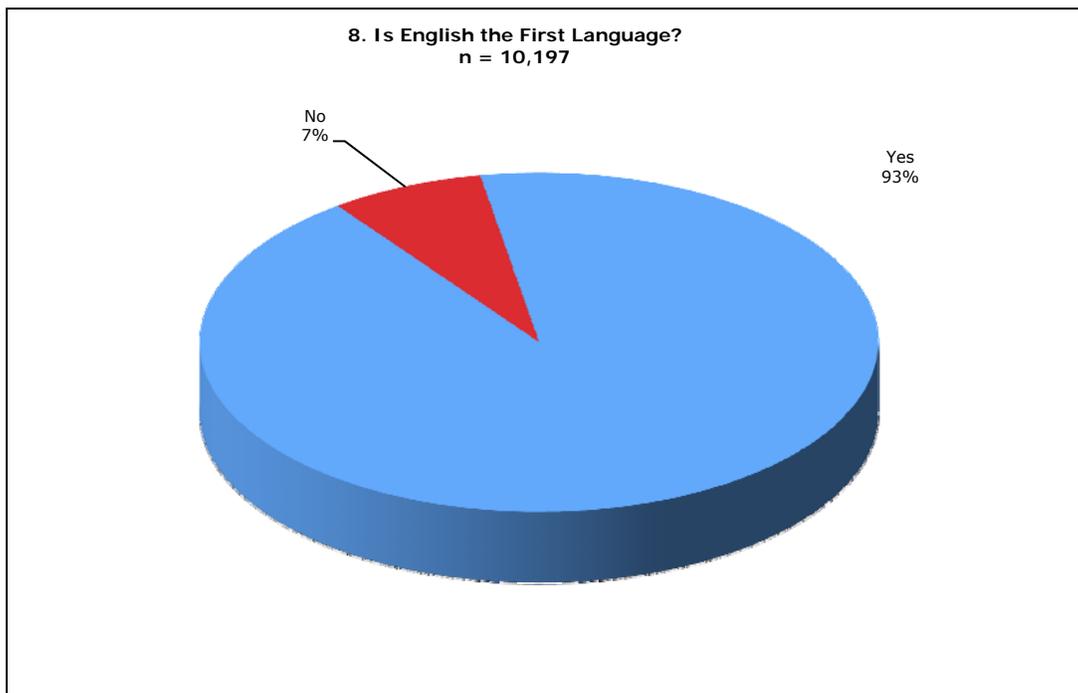
In answer to the first of these questions, the respondents are very nearly equally divided between those who have a driver's license (49 percent) and those who do not (51 percent).

2. Impairments and Assistance Needed



80.5 percent of respondents report having no impairment or disability that would require any assistance in using transit services. 8.9 percent report difficulty walking, while a little over 1 percent report having visual and hearing impairments, respectively. Other impairments occur in frequencies between these two extremes, including 3.2 percent of respondents who require the use of a lift.

3. English As a First or Second Language



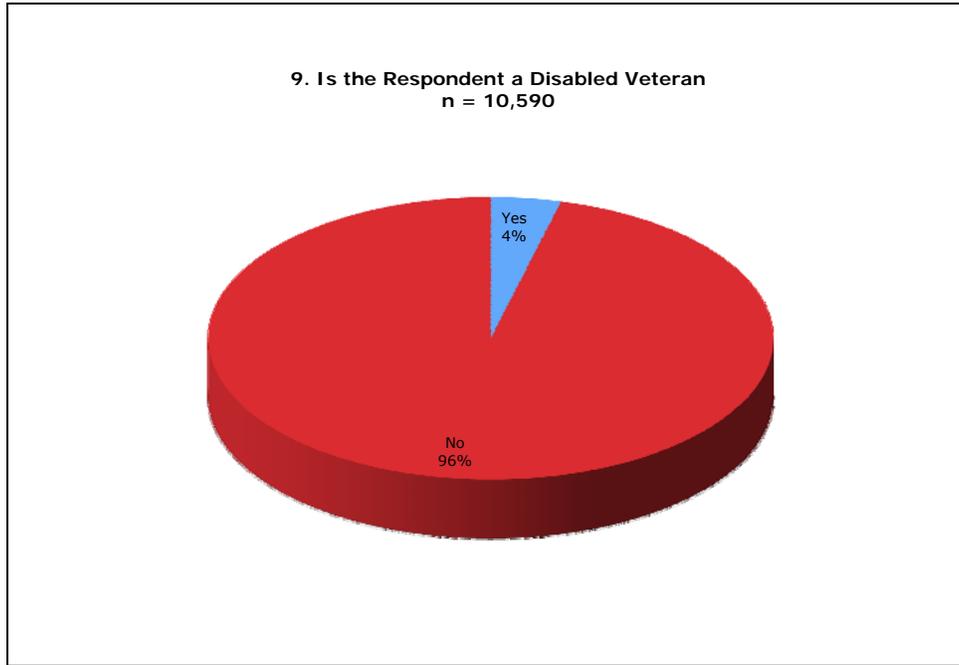
93 percent of 10,197 respondents who replied to this question reported that English is their first language. 749 respondents reported that English is **not** their first language.

Almost 4,000 respondents went on to reply to Question 14.2, which was intended only for those respondents for whom English is not their first language. 96 percent said they understand English very well or well. 4 percent said they understand English “not well” (3 percent) or “not at all” (1 percent). A total of 712 respondents reported that they understand English “not well” or “not at all.”

Assuming that all of these 712 respondents are among the 749 for whom English is not their first language, then fully 95 percent of those for whom English is **not** their first language understand English only not well or not at all.

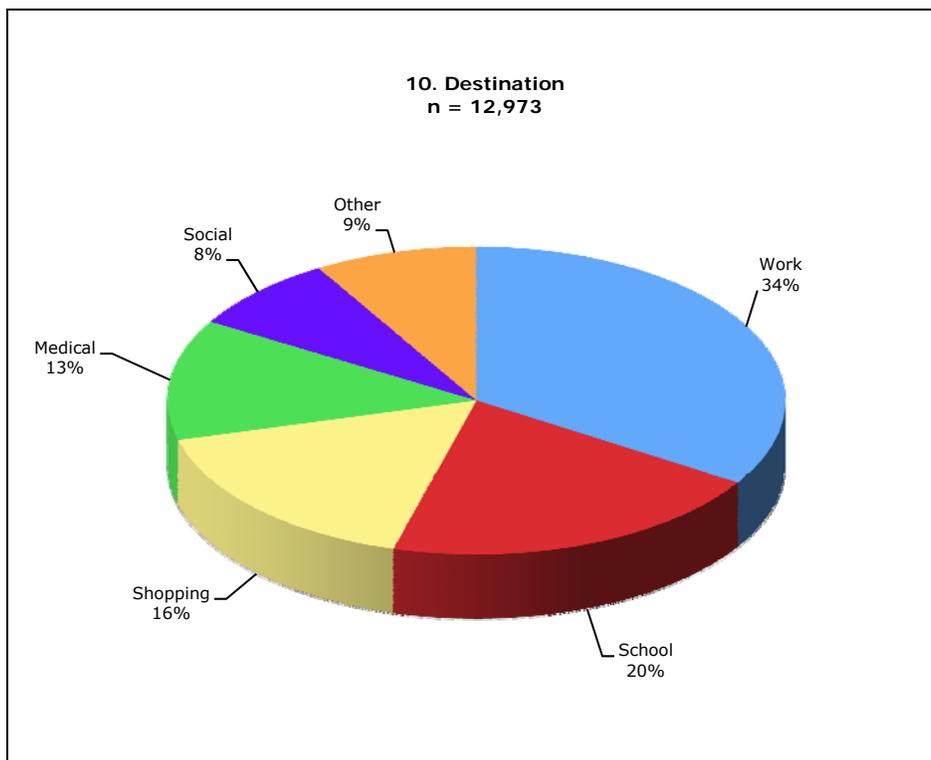
Respondents were not asked what their first language (if not English) is, but the ethnicity of those respondents is reported in Section V on page 31 of this report.

4. Disabled Veterans



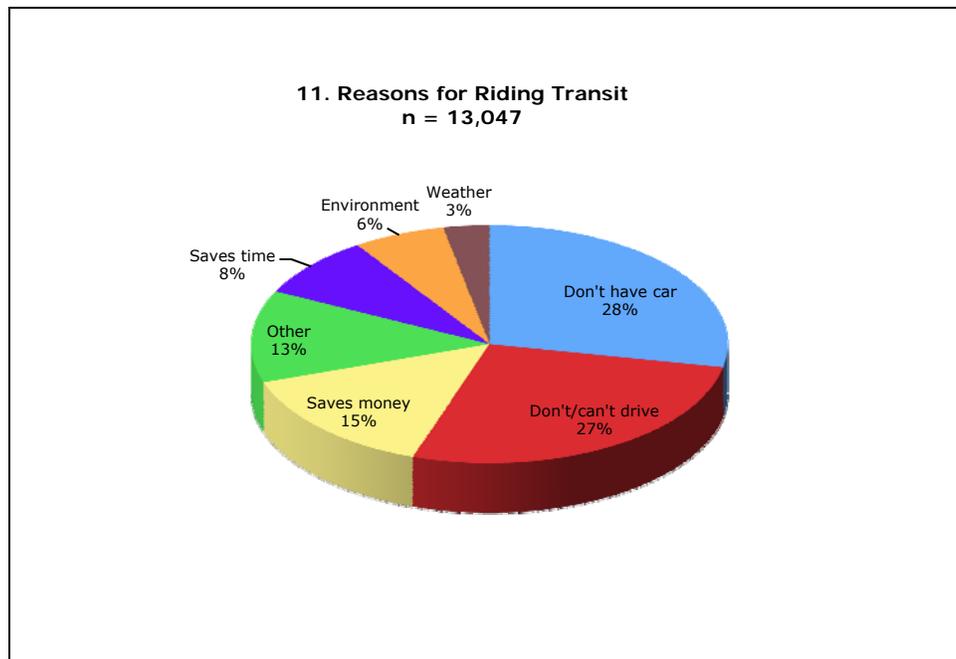
4 percent of respondents are disabled veterans. Disabled veterans are reported by transit system type in Section IV on page 30 of this report.

D. Transit Behaviors



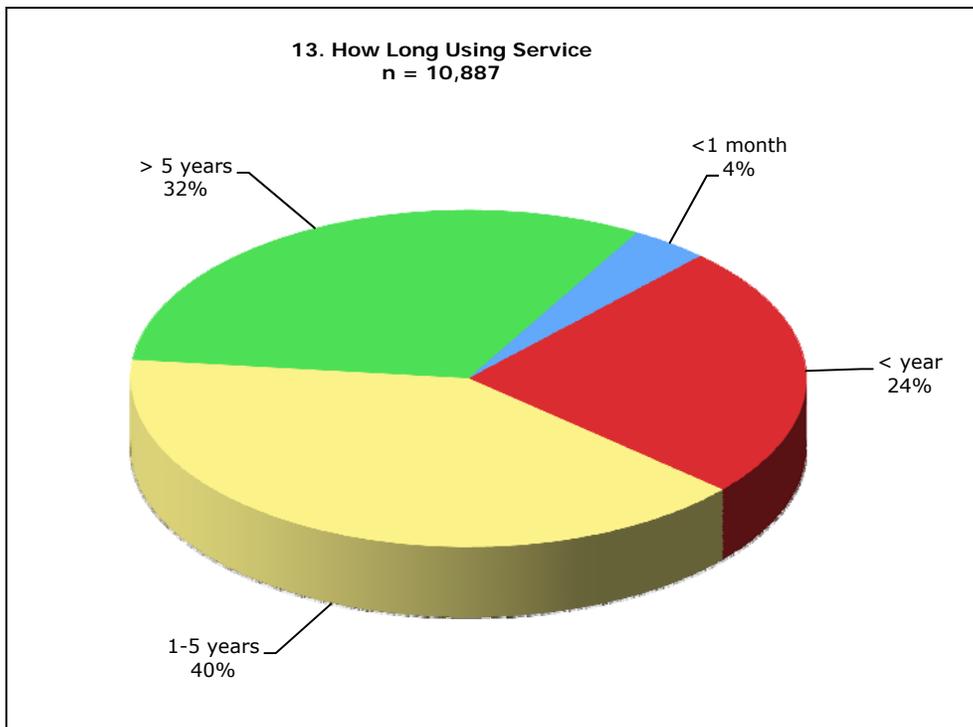
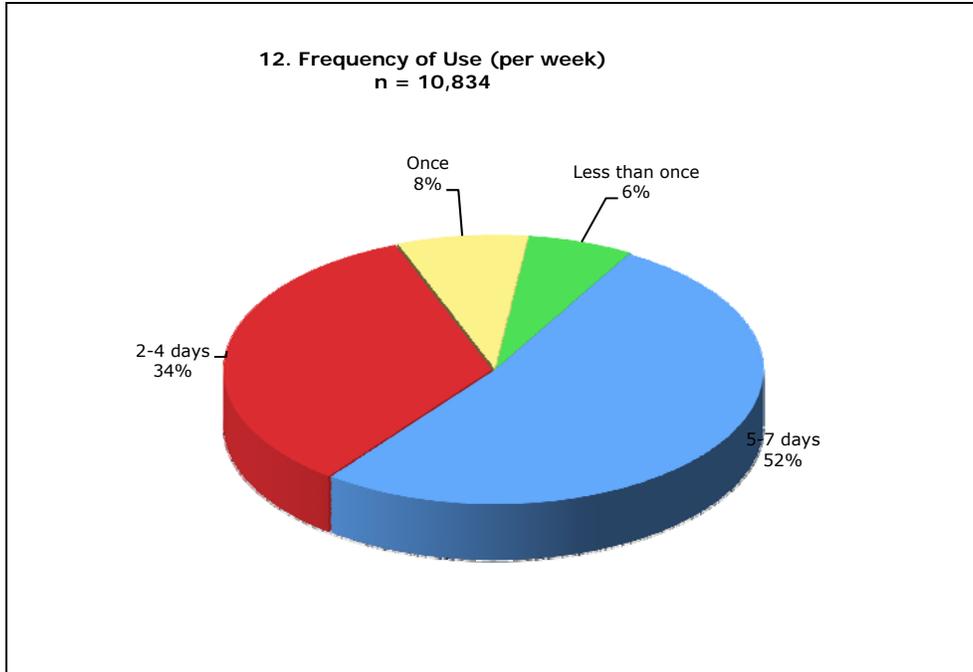
On the day on which they participated in the survey, more than half (53 percent) of the respondents were riding transit either to work or to school. One trip in three was to work, and one trip in five was to school. 16 percent were for shopping, 13 percent for medical purposes and 8 percent for social activities. 8.5 percent reported some other purpose for the trip.

More than 10 percent of the respondents checked more than one destination, and so the number of destinations (12,973) outnumbers the respondents (11,022). The percentages in the chart are the percent of total destinations, not the percent of respondents. The average respondent had 1.18 destinations.

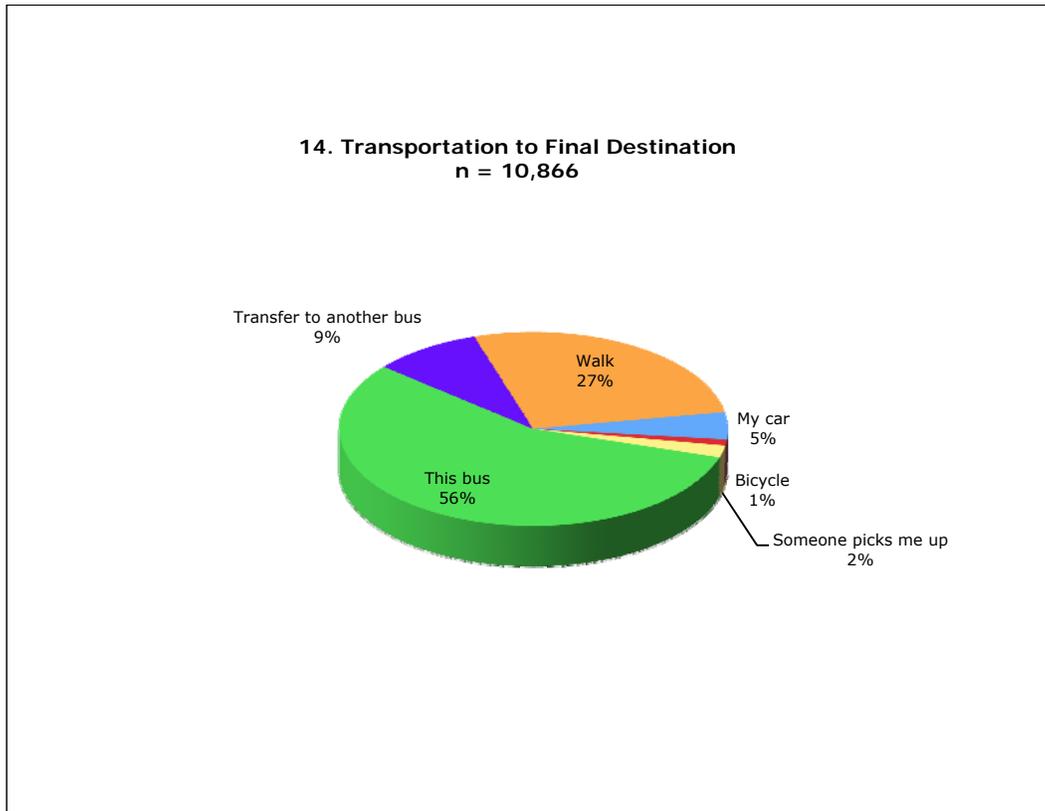


A majority of the respondents (57 percent) said they chose to ride transit because they do not or cannot drive, do not have a car, or dislike driving. Almost exactly half as many (28 percent) chose to ride transit due to one or another positive attribute of transit—it saves money, it saves time or it's "better for the environment." 3 percent ride transit on this particular day because of "the weather," and 12 percent had "other" reasons.

More than 10 percent of the respondents checked more than one reason for riding transit, and so the number of reasons (13,047) outnumbers the respondents (11,022). The percentages in the chart are the percent of total reasons given, not the percent of respondents. The average respondent gave 1.18 reasons for riding transit on the day the survey was filled out.



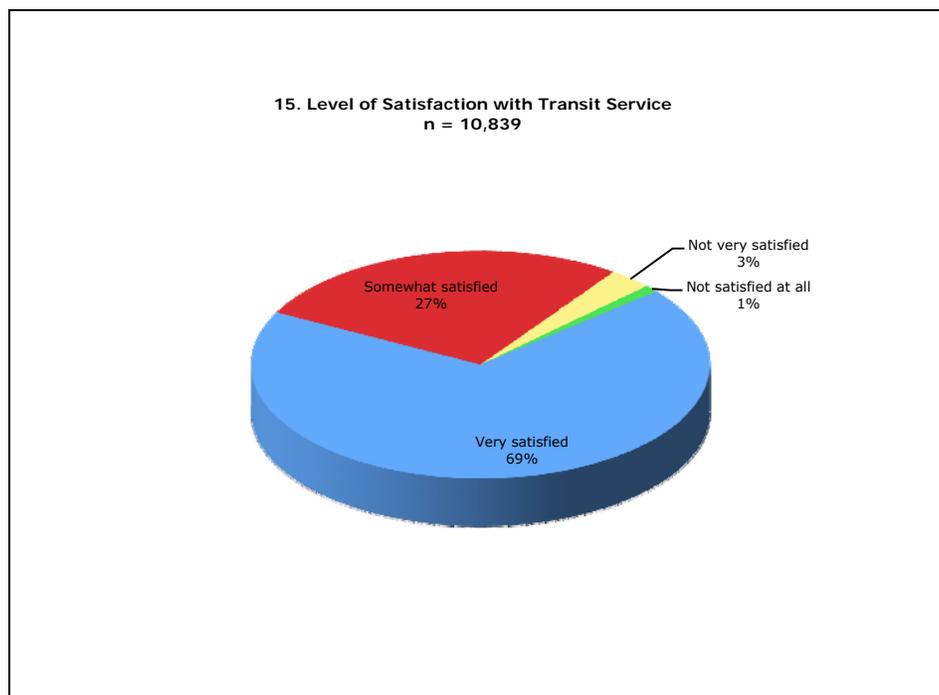
More than half of the respondents ride transit 5 to 7 days a week, while almost three respondents out of four have ridden transit for at least a year. One in three has ridden transit for five years or more.



Respondents were asked if they need additional transportation after getting off of “this bus,” to complete their trip to their final destination. 56 percent said, no, that “this bus drops me off” at my destination. 27 percent said they walk, while 9 transfer to another bus. Less than 5 percent each use any other additional transportation.

C. Attitudes and Opinions

1. Satisfaction with Transit Services



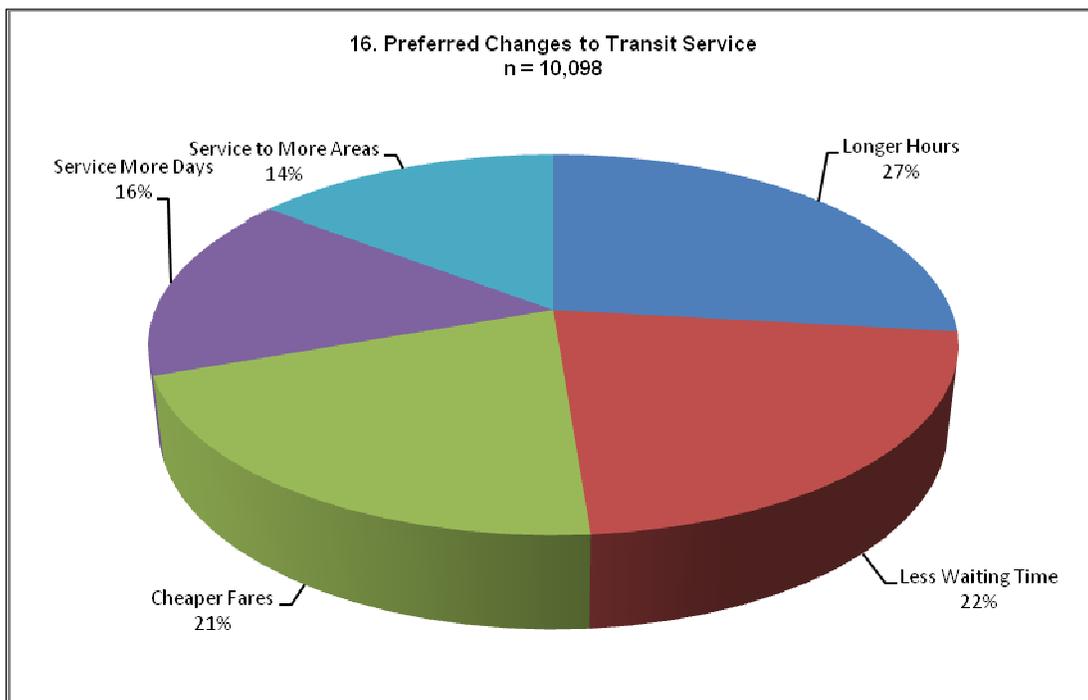
Satisfaction with current levels of transit service is high. The respondents were asked to express their satisfaction with the quality of transit services that as “very satisfied,” “somewhat satisfied,” “not very satisfied” and “not satisfied at all.”

69 percent said they were very satisfied, and 96 percent said they were very satisfied or somewhat satisfied.

2. Percent of Transportation Needs Met by Transit Services

They were then asked *what percent of their travel/transportation needs were served by transit. The statewide mean response was 67.7 percent.* Transit, in other words, meets two-thirds of the transportation needs of those Greater Minnesota residents who use transit. One-third of the transportation needs of Greater Minnesota residents who use transit are not met by the transit service.

3. Preferred Changes to Transit Service



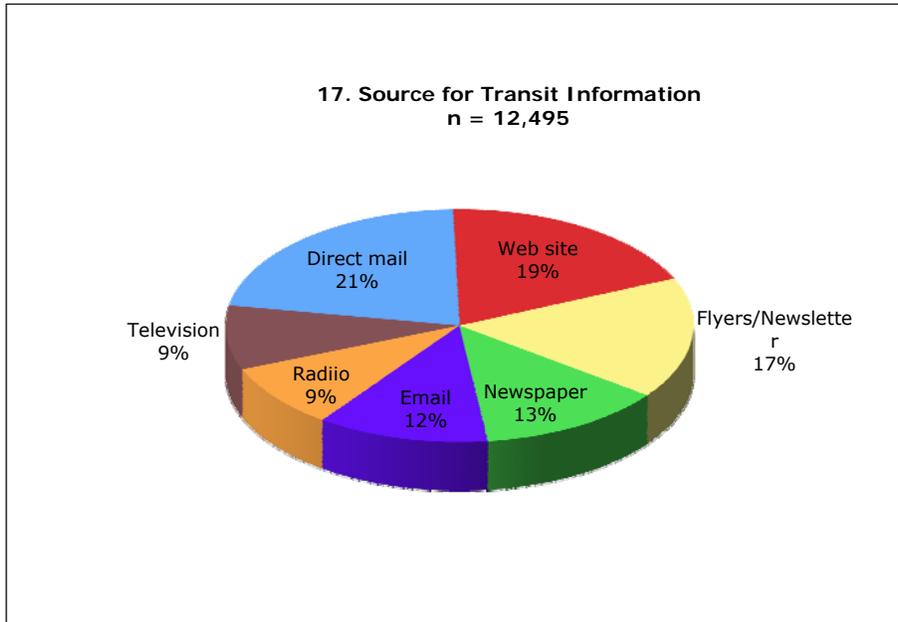
The respondents were asked what potential changes to transit service would be most valuable to them.

- 70 percent preferred changes in the timing of the service;
- 34 percent preferred “longer hours of service;”
- 23 percent preferred “less waiting time between buses or for scheduling a bus reservation;”
- 13 percent preferred “service on more days of the week.”

Others preferred cheaper fares and service to destinations not currently served.

- 17 percent preferred “cheaper fares;”
- 13 percent preferred “service to more areas.”

4. Preferred Medium for Receiving Transit Information



Finally, respondents were asked how they prefer to get transit information. The respondents were significantly divided. Six different media were preferred by 9 percent through 21 percent each, with direct mail (21 percent), a transit web site (19 percent) and flyers and/or newsletters (17 percent) the most preferred options. About one in eight respondents checked more than one response. The percentages shown represent the percentage of total responses, not of total respondents.

IV. Results by Transit System Type

As noted earlier, each of the four transit system types differs significantly from the aggregate statewide results. Following are the key ways in which this is true, along with key ways in which each group is **like** the aggregate.

A. Large Urban Fixed Route Systems

Riders of the Large Urban Fixed Route transit services differ from the statewide aggregate as follows:

- They are more likely to be between the ages of 18 and 34, and less likely to be age 65+.
- They are somewhat more likely to be commuting to work or school, and somewhat more likely to be frequent riders. 65 percent ride every day (5 to 7 days per week).
- They are more likely to have a driver's license, and less likely to say that they do not or cannot drive. They are about 10 percent more likely to be riding on a discretionary basis rather than as a matter of necessity.
- They are more likely (92 percent versus 80 percent statewide) to report no impairments and no assistance needed to ride the bus.

Table 2. Demographic and Behavioral Differentials—Large Urban Fixed Route Service

		Statewide Aggregate n = 11,022	Large Urban Fixed Route n = 6,014
Age	18-34	37.3 percent	51.5 percent
	65+	16	3.8
Ride Transit to Work or School		54.4	66.3
Ride Transit 5-7 Days Per Week		52.1	65.0
Don't Drive/ Don't Have a Car		52.8	74.2
Don't Have Driver's License		51.2	37.1
Impairments/Assistance Needed		80.5 percent no impairments	91.9 percent no impairments

Riders of Large Urban Fixed Route transit service are about equally satisfied the level of transit service as other riders and, like all riders taken in the aggregate, they estimate that their transit service meets about two-thirds of their transportation needs. And, like the statewide aggregate, their preferred enhancement to transit service is longer hours of service.

They differ from the aggregate, however, in that they prefer to receive transit information via digital mediums, including transit Web sites and email.

Table 3. Key Attributes, Opinions and Attitudes—Large Urban Fixed Route Systems

	Statewide Aggregate n = 11,022	Large Urban Fixed Route n = 6,014
Level of Satisfaction with Transit Service	95.6 percent Very Satisfied or Somewhat Satisfied	94.6 percent Very Satisfied or Somewhat Satisfied
Percent of Needs Served	67.7	67.2
Preferred Changes to Transit Service	Longer Hours of Service 34.2 Less Waiting Time 23.4	Longer Hours of Service 38.2 Less waiting time 26.9
Preferred Medium for Receiving Transit Information	Direct Mail 22.2 Transit Web Site 18.6 Flyers/Newsletters 16.8	Transit Web Site 26.9 Flyers/Newsletters 16.9 Email 15.0

B. Large Urban ADA Service

Riders of the Large Urban ADA transit services differ from the statewide aggregate as follows:

- They are on average older than riders of other transit types. 38 percent are age 65+, highest of any transit type, and only 16 percent are age 18-34, lowest of any transit type.
- They are much more likely to be traveling to a medical appointment (34 percent) and less likely to be going to school (6.6 percent).
- They are less likely to have a driver's license (24.5 percent), and much more likely to say that they do not or cannot drive.
- They are least likely to report no impairments (25 percent) and most likely to require assistance to ride the bus.

Table 4. Demographic and Behavioral Differentials—Large Urban ADA Services

		Statewide Aggregate n = 11,022	Large Urban ADA n = 187
Age	18-34	37.3 percent	15.7 percent
	65+	16	38.4
Ride Transit to Work or School		54.4	36.0 34 percent ride to Medical activity
Ride Transit 5-7 Days Per Week		52.1	37.6
Don't Have Driver's License		51.2	75.5
Impairments/ Assistance Needs		80.5 percent no impairments	25 percent no impairments

Riders of Large Urban ADA Services are about equally satisfied with their transit service as other riders. 96 percent are Very Satisfied or Somewhat Satisfied versus 95.6 percent of riders statewide.

- Their preferred changes to the transit system are quite unique. About 40 percent want more frequent service (less waiting time) during existing service hours, while about 22 percent want cheaper fares.
- They regard their transit service as meeting a higher percentage of transportation needs than other riders by 73 percent to about 67 percent
- They are much more likely to prefer receiving transit information via direct mail (53 percent).

Table 5. Key Attributes, Opinions and Attitudes—Large Urban ADA Services

	Statewide Aggregate N = 11,022	Large Urban ADA n = 187
Level of Satisfaction	95.6 percent Very Satisfied or Somewhat Satisfied	96 percent Very Satisfied or Somewhat Satisfied
Percent of Needs Served	67.7	73.2
Preferred Changes to Transit Service	Longer Hours of Service 34.2 Less Waiting Time 23.4	Less waiting time 40.3 Cheaper fares 22.4
Preference for Receiving Transit Information	Direct mail 22.2 Web site 18.6	Direct mail 53 Web site 7.3

C. Small Urban Transit Systems

Riders of Small Urban Transit Systems differ from the statewide norm in several ways.

- More riders are 65+ (31.4 percent) and fewer are ages 18-34 (22.1 percent).
- They are less likely to ride to work or school, and more likely to ride to shopping. They are also likely to ride less frequently.
- They are slightly more likely to report that they do not have a driver's license.

They are similar to the statewide norm in terms of the percentage of riders who report having an impairment and requiring assistance in riding transit.

Table 6. Demographic and Behavioral Differentials—Small Urban Systems

		Statewide Aggregate n = 11,022	Small Urban Systems n = 873
Age	18-34	37.3 percent	22.1 percent
	65+	16	31.4
Ride Transit to Work or School		54.4	38.4 27.3 percent ride to shopping
Ride Transit 5-7 Days Per Week		52.1	39.4
Don't Have Driver's License		51.2	61.4
Impairments/ Assistance Needs		80.5 percent no impairments	77 percent no impairments

Riders of Small Urban Transit Systems are about equally satisfied with their transit service as other riders.

- They report that their transit system meets a very slightly larger percentage of their transportation needs, 69.6 percent to 67.7 percent for the statewide average.
- They agree with the aggregate that the preferred enhancement to transit service is longer hours of service. In fact, 39.8 percent of riders of Small Urban Transit Systems want longer hours of service versus 34.2 percent statewide. 21.1 percent of riders also want service on more days, which is the highest percent who prefer this service enhancement among any of the transit service types.
- They agree with the statewide norm in their preference for receiving transit information via direct mail (28.2 percent versus the statewide average of 22.2 percent).

Table 7. Key Attributes, Opinions and Attitudes—Small Urban Systems

	Statewide Aggregate n = 11,022	Small Urban Systems n = 873
Level of Satisfaction	95.6 percent Very Satisfied or Somewhat Satisfied	95.5 percent Very Satisfied or Somewhat Satisfied
Percent of Needs Served	67.7	69.6
Preferred Changes to Transit Service	Longer Hours of Service 34.2 Less Waiting Time 23.4	Longer Hours of Service 39.8 Service More Days 21.1
Preference for Receiving Transit Information	Direct mail 22.2 Web site 18.6	Direct mail 28.2 Web site 11.6

D. Rural Transit Systems

Riders of Rural Transit Systems are more likely to be 65+ years of age, and less likely to be age 18-34.

- They are less likely to ride the bus to work or school, and they ride less frequently.
- They are more likely to say that they do not drive, or do not have a car or a driver’s license.
- They are more likely to report that they have an impairment and that they need assistance riding transit.

Table 8. Demographic and Behavioral Differentials—Riders of Rural Transit Systems

		Statewide Aggregate n = 11,022	Rural Transit Systems n = 3,795
Age	18-34	37.3 percent	18.2 percent
	65+	16	31.7
Ride Transit to Work or School		54.4	40.3
Ride Transit 5-7 Days Per Week		52.1	34.8
Don't Drive/Don't Have a Car		52.8	68.9
Don't Have Driver's License		51.2	70.7
Impairments/ Assistance Needs		80.5 percent no impairments	65.2 percent no impairments

Riders of Rural Transit Systems are slightly more satisfied with their transit service than the statewide aggregate. 97.1 percent are Very Satisfied or Somewhat Satisfied versus 95.6 percent statewide.

- They report that their transit service meets 67.8 percent of their transportation needs compared to 67.7 percent statewide.
- They agree with riders statewide that the preferred transit enhancement is longer hours of service. They also prefer cheaper fares (21.8 percent) and service on more days (20.4 percent) more than the statewide norm.
- Like the statewide aggregate, they prefer to get transit information via direct mail, but by an even larger number (37.4 percent versus 22.2 percent statewide).

Table 9. Key Attributes, Opinions and Attitudes—Rural Transit Systems

	Statewide Aggregate n = 11,022	Rural Transit Systems n = 3,795
Level of Satisfaction	95.6 percent Very Satisfied or Somewhat Satisfied	97.1 percent Very Satisfied or Somewhat Satisfied
Percent of Needs Served	67.7	67.8
Preferred Changes to Transit Service	Longer Hours of Service 34.2 Less Waiting Time 23.4	Longer Hours of Service 26.6 Cheaper Fares 21.8 Service More Days 20.4
Preference for Receiving Transit Information	Direct mail 22.2 Web site 18.6	Direct mail 37.4 Web site 5.4

E. Incidence of Disabled Veterans by Transit Service Type

4 percent of respondents are disabled veterans, However, more than three times as many riders of Large Urban ADA transit services (13.6 percent) are disabled veterans. Riders of the other three transit types range from 3.4 percent to 4.4 percent disabled veterans.

Table 10. Incidence of Disabled Veterans

	Total		Large Urban – Route		Large Urban – ADA		Small Urban		Rural	
	#	%	#	%	#	%	#	%	#	%
Yes	419	4.0	204	3.4	21	13.6	35	4.2	159	4.4
No	10,171	96.0	5,757	96.6	133	86.4	790	95.8	3,467	95.6

V. Other Significant Differentials

A. Differentials Among Demographic Groups

1. Age

After transit system type, age is the greatest differentiator among Greater Minnesota transit riders.

- Riders under the age of 18 mostly ride to school (62 percent), and 83 percent ride twice a week or more. Only 11 percent have ridden for five years or more. These younger riders are much more likely to want cheaper fares (35 percent versus just 15-16 percent for the other age categories). Household income is highest for those under 18 years of age.
- Riders age 18-34 mostly ride to school (39 percent) and work (35 percent), and 92 percent ride twice a week or more.
- Riders age 35-64 most ride to work (48 percent), and 90 percent ride twice a week or more. Almost half have ridden for five years or more.
- Riders age 65+ ride to shopping (33 percent) and medical (29.5 percent), and only 64.5 percent ride twice a week or more. More than 40 percent have ridden for five years or more. Ridership becomes progressively more female as age increases, until 76 percent age 65+ are female. Ridership also becomes less diverse as age increases; 91 percent of riders age 65+ are white. African-American ridership drops from 11 percent age 18 and under to 1 percent age 65+, and Asian and Hispanic/Latino ridership drops similarly. Older riders are more likely to report the need of assistance: 26 percent report difficulty walking. Older riders also prefer receiving transit information via direct mail, and are less likely to prefer e-mail and Web sites. Household income is lowest for those age 65+.

2. Ethnicity

Responses also vary somewhat by the ethnicity of the respondent. Only 9 percent of Asians have ridden transit for five years or more, versus 20 percent or more (and up to 42 percent of Native Americans) for all other ethnic groups. Two out of every three Asian respondents is age 18-34, almost twice the statewide norm.

3. English as a Second Language

Related to the question of ethnicity is that of whether English is the respondent's first language or not. In total, 749 respondents (7.3 percent of those who answered the question) report that English is not their first language. Those who report that English is their second language are eleven times more likely than the statewide norm to report Asian ethnicity, seven times more likely to report Hispanic/Latino and three times more likely to report African-American ethnicity.

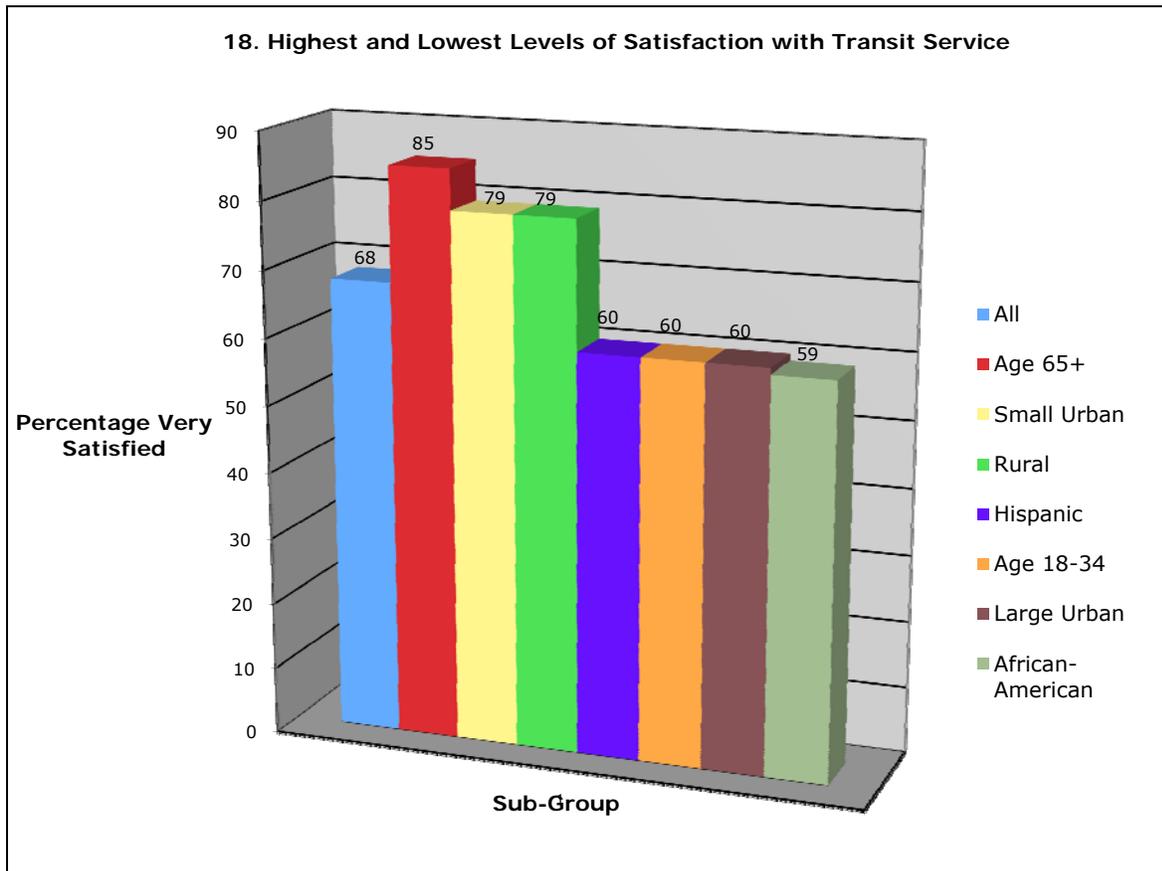
Table 11. Ethnicity of Those Who Speak English as a Second Language

Ethnicity	Statewide N = 11,022	Those Who Report ESL N = 749
African-American	6.4 percent	20 percent
Asian	3.4	36.6
Hispanic/Latino	2.7	18.1
Native American	4.7	1.4
White	78.7	11.6
Other	4.1	12.4

These riders who report English as their second language are also more likely to be riding to school (45 percent versus 20 percent of all respondents), and 61 percent are age 18-34 (versus 37 percent of all respondents); only 3 percent are age 65+ (versus 16 percent of the total sample).

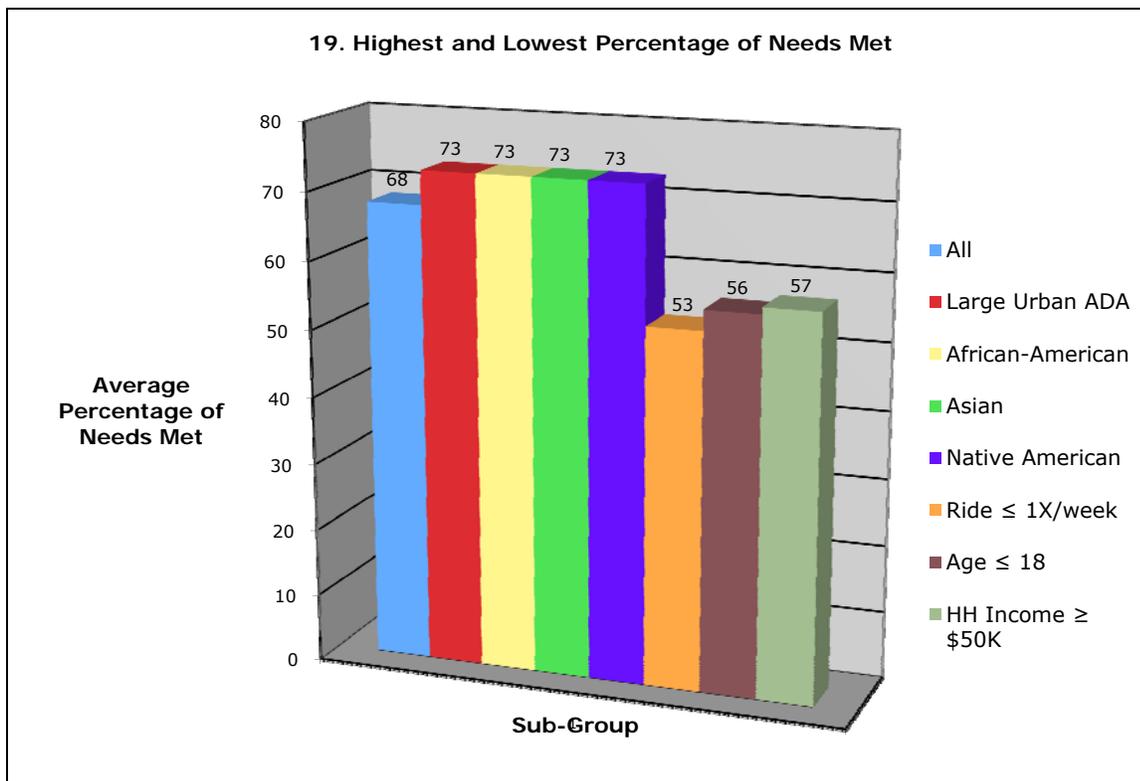
B. Differential Attitudes and Opinions

1. Differential Levels of Satisfaction/Are Needs Being Met?



Levels of satisfaction with transit service are high: 68 percent of all respondents stated that they are “very satisfied” with the service, and another 27 percent said they are “somewhat satisfied.” A majority of every sub-category of respondents is “very satisfied.” But, there are differentials. The chart shows the three sub-groups that are most satisfied (riders age 65+, and riders of small urban and rural systems) and the four sub-groups that are least satisfied with their transit service (Hispanic and African-American riders, riders age 18-34 and riders of large urban systems).

Respondents also were asked what percentage of their transportation needs were being served by their local transit system. The statewide average was 68 percent. Following are the higher and lower percentages reported by sub-groups of respondents.



Coincidentally, the respondents report in the aggregate that their transit service meets 68 percent of their transportation needs (coincidentally with the fact that 68 percent are very satisfied with their service). Riders of Large Urban ADA services, and African-American, Asian and Native Americans report the highest percentage of needs being met. Those who ride once a week or less, those 18 years of age or younger and those with higher household incomes report less of their transportation needs being met by transit.

One might expect that those whose needs more fully are being met to be more satisfied with their service, but this is not the case. African-Americans and Asians, for example, report a high percentage of their needs being met, but are among those least satisfied with their service. The converse is true among those who use transit once a week or less. It meets fewer of their needs, and yet they are among the most satisfied. What seems to correlate with the level of satisfaction is where the respondent has an option to transit—that is, a car, and a Driver’s License. Following are all sub-groups who score “High” or “Low” on two or more of these three variables.

Table 12. Levels of Satisfaction with Transit Services and Percentage of Needs Being Met By Demographic Group

Sub-Group	Level of Satisfaction	Needs Being Met	Driver's License	Comments
Riders of Large Urban ADA	High	High	Low	Lack options, have lower expectations for mobility, low expectations are being met, satisfaction is high
Riders of Rural Transit System	High		Low	
Needs Assistance	High	High	Low	
Ride Once a Week or Less	High	High		
Riders of Large Urban Route Service	Low		High	Mobility expectations are high, transit mobility is compared to their other major option (a car) and is found to be limiting
Riders Age 18-34	Low		High	
Asian	Low	High	High	Similar to other riders of Large Urban Route Service: have access to car and see transit as limiting, despite the fact that transit expectations are being met
African-American	Low	High		Similar to Asian riders, perhaps; have low expectations of transit; transit expectations are being met, but these are differentiated from broader mobility needs
Riders ≤ Age 18		Low	Low	Unlike others who lack Driver's License, their mobility expectations are those of their parents (higher), they expect to have a D.L. soon, and so they see transit as limiting
Native American		High	Low	Lower expectations for mobility, low expectations are being met

2. Differential Preferences for Potential Changes to the Transit Service

The vast majority of sub-groups rated "Longer hours of service" as the change to the transit system that would be most valuable to them. Only riders of Large Urban ADA transit did not list it among their top two most preferred changes. Riders 65+ years of age and those with household incomes greater than \$50,000 rated it as the #2 preferred change.

Most sub-groups rated this as their #2 choice for change. Riders of Large Urban ADA transit and those with household incomes greater than \$50,000 rated this as their #1 priority.

Overall, 17 percent of respondents want cheaper fares. Riders age 18 and under are the most favorable to lower fares at 25 percent.

13 percent of respondents chose service on more days as their change for the better. More than twice as many respondents age 65+ want service on more days. Riders of small urban systems and rural systems also broke 20 percent on this preference.

13 percent of respondents chose service to more areas. The variance here was very small; Asian respondents are most favorable to this, as just 18 percent.

3. Differential Preferences for Receiving Information About Transit

Riders of Large Urban ADA systems prefer to receive transit information via direct mail by a whopping majority of 53 percent. 39 percent of riders age 65+ prefer direct mail. Overall, 22 percent of respondents prefer direct mail, with a low of just 10 percent of households with an income of \$50,000 or more.

Overall, 19 percent of respondents prefer Web sites and 12 prefer e-mail (for a total digital preference of 31 percent). The highest total digital preference is among Asian riders at 57 percent (34 percent Web and 23 percent e-mail) and 54 percent among riders with household incomes of \$50,000 or more (33 percent Web and 21 percent e-mail). Breaking the 40 percent barrier are riders age 18-34 (45.5 percent) and riders of Large Urban Route systems (42 percent.)

- Flyers and/or newsletters are preferred by 17 percent of respondents, with a high of 19 percent among African-Americans and a low of 10 percent among riders of Large Urban ADA services.
- Newspapers are preferred by 13 percent, with a high of 18.5 percent among riders of Small Urban systems and a low of 7 percent among riders of Large Urban ADA systems and also among Asian riders.

Radio and television are each preferred by 9 percent, overall. The highs and lows include 14 percent of African-Americans who prefer television to 5 percent of Asians and those with higher household incomes who prefer radio.