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## INTRODUCTION

Understanding how transit customers use transit in Greater Minnesota and what they see as the system's strengths and weaknesses help determine how well service meets needs and where gaps lie. In defining investment priorities to improve transit service, the importance of soliciting feedback from existing riders cannot be overstated. This technical memorandum of the Greater Minnesota Transit Investment Plan (GMTIP) presents and summarizes key findings from an on-board rider survey of transit riders geared toward identifying prevailing user preferences and travel patterns of existing transit riders across Greater Minnesota.

## ON-BOARD SURVEY AND METHODOLOGY

Nelson\Nygaard developed a rider survey distributed by MnDOT to transit providers operating across Greater Minnesota. The surveys were administered on-board transit vehicles to users of more than 40 systems across the state from rural dial-a-ride services to large fixed-route systems in cities such as Duluth and Mankato. Riders responded to questions related to transit use, including mode of access, frequency of use, trip purpose, and desired improvements. Surveys were distributed during the course of one calendar week, with most systems conducting their surveys during the week of November 2, 2015. Participants were assisted in a variety of ways including: bus drivers helping to fill out forms for those requiring help writing, working with caretakers to facilitate completion in group homes, and sending forms home with children to receive help from a parent or guardian. In total 5,297 valid surveys were collected: 5,258 in English, 25 in Spanish, 11 in Somali, and 3 in Hmong.<sup>1</sup>

## SUMMARY OF FINDINGS

### Respondent Profile

- The Greater Minnesota Transit Survey, conducted in fall 2015, yielded a total of 5,297 valid responses from riders of 44 transit systems. More than half of respondents represent rural service types, and more than one-third represent urbanized services.
- Seventy-seven percent of respondents are between the ages of 18 and 64. Sixty percent are female and 40% male.
- Half of respondents' (50%) earnings lie within the lowest category of household income available as a response—under \$25,000. Only 8% of respondents have a household income higher than \$49,000.
- Of the total valid surveys submitted, less than 1% were completed in a language other than English.
- Seventy-eight percent of respondents are white. Black/African-American, Mixed/Other, Asian, and Hispanic respondents range from shares of 3% to 7%.
- More than half (59%) of respondents do not have a driver's license.

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<sup>1</sup> Results for systems in MnDOT District 6 were collected from a previous survey conducted by Nelson\Nygaard in spring 2015 for a project focusing on transit in Southeast Minnesota.

- Thirty-nine percent of respondents report identifying as someone with a disability, while 19% report having a physical condition that requires assistance to use transit.

## Transit Behaviors

- Almost two-thirds (65%) of respondents list work or school as a primary transit trip destination.
- Twenty-seven percent of respondents prioritize convenience when choosing their mode of travel. Travel time is the second most cited factor at 17%.
- Half of respondents ride transit 5–7 days per week, with 82% of respondents riding transit at least twice a week.
- One-third of respondents have been riding transit for more than five years, and 73% have been riding transit for at least a year.

## Attitudes and Opinions

- Fifty-one percent of respondents are “Very Satisfied” with transit service availability in their community. Thirty-four percent are “Satisfied” and 10% are “Somewhat Satisfied.” Five percent are dissatisfied with service.
- More than 70% of respondents note that “75% or More” of their travel needs are served by transit.
- When given the choice to select desired improvements to transit, 42% selected longer service hours and 24% selected increased reliability (transit arriving on-time). A large percent (18%) of respondents selected “Other (please specify).” Comments listed under this response consist mainly of a desire for longer hours of service or provision of service on weekends.
- Forty percent of respondents picked flyers/newsletters as the preferred source for receiving transit information. Twenty-four percent prefer newspapers, and 22% prefer transit websites. Less than 15% of respondents listed social media platforms such as Facebook and Twitter as a preferred source of transit information.

## Differentials by Transit System Type

- Riders of urbanized systems are younger than the statewide average (22.5% more between ages 18–34) and are most likely to be riding transit to work or school (80% vs. 65%). They have the highest level of transit satisfaction, but the lowest share of respondents that consider at least 75% of their travel needs served by transit. They have a considerably higher rate of preference for receiving transit information via transit websites and social media platforms compared to riders in small urban or rural areas.
- Riders of small urban systems fall in between urban and rural riders in terms of age. More than half (57%) utilize transit as a primary means to access work or school. Small urban system riders are more likely to use transit for shopping and errands than other service areas. They have a level of satisfaction slightly above the statewide average, and the rate of respondents that consider at least 75% of their travel needs served by transit is 1% below the statewide average. Small urban systems had a much lower rate of response compared to other service areas, comprising just 6% of total Greater Minnesota results.

- Riders of rural systems are more likely to be above the age of 65 and less likely to be between ages 18–34. They are less likely to utilize transit to access work or school than riders of other service types, however they are more likely to utilize transit to access medical destinations and for shopping than other service types. Compared to other service areas and the statewide average, they have a considerably lower rate of driver’s license ownership (28.1%) and a higher rate of physical conditions that require assistance to use transit (29% reported having a condition affecting access to the bus). They have a level of satisfaction above the statewide average, and have the highest rate of respondents who consider at least 75% of their travel needs served by transit (73.7%).

## GREATER MINNESOTA RESULTS

This section provides detailed data for all questions in the survey.

In order to assess the results in the context of the Greater Minnesota Transit Investment Plan, survey responses were grouped into the three population designations used to allocate transit funding (see Table 1).

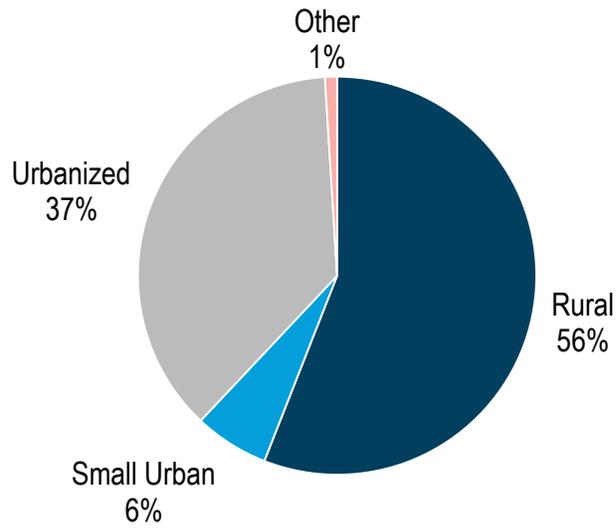
**Table 1** Transit System Types

System Type	Primary Population Center Population	Typical Service Types
Rural	Less than 2,500	Dial-a-ride
Small Urban	2,500–50,000	Dial-a-ride, deviated route, fixed-route
Urban	More than 50,000	Dial-a-ride, fixed-route

Figure 1 shows the share of survey responses by transit system category. A majority of responses (56%) came from riders on rural systems, which is to be expected considering the bulk of Greater Minnesota is rural in nature. Table 2 lists all the transit agencies who participated along with the number of survey respondents. Levels of response varied from 11 riders on Prairieland Transit /Nobles County Heartland Express to 1,214 riders on Duluth Transit Authority (DTA) buses. The second and third most responses were received from Greater Mankato Transit (625) and Arrowhead (618), which has a considerably higher level of response compared to other rural systems. This effort was the first year in which tribal services were surveyed, garnering 80 responses from Fond Du Lac Band Transit. In order to provide a consistent survey instrument across all systems, surveys were not distributed on board ADA paratransit services.

A few Greater Minnesota transit operators in urbanized areas recently conducted their own on-board surveys as part of the long-range transportation plan process. These results were not included into the statewide aggregate but are analyzed separately later in the chapter.

Figure 1 Responses by Transit System Type



n = 5,297

**Table 2 Respondents by Transit Provider (listed in alphabetical order)**

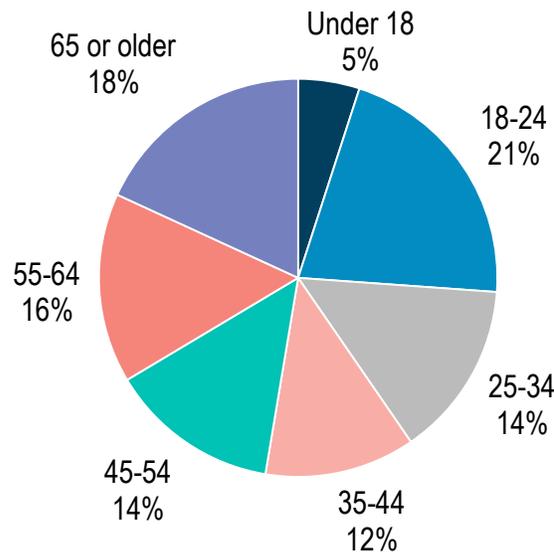
Transit System Type	Transit Provider	Survey Respondents
Rural	Arrowhead	618
	Becker County Transit	41
	Brainerd & Crow Wing Public Transit	79
	Brown County Heartland Express	117
	Central Community Transit	208
	Chisago-Istanti County Heartland Express	167
	Faribault County Prairie Express	26
	Fond Du Lac Band Transit	80
	Fosston Transit	31
	Hiawathaland Transit/Three Rivers	133
	Hubbard County Heartland Express	75
	Martin County Express	84
	Meeker County Public Transit	36
	Murray County Heartland Express	24
	Otter Express /Transit Alternatives	64
	Paul Bunyan Transit	88
	Pipestone Transit	40
	Prairie Five Rides	121
	Prairieland Transit /Nobles County Heartland Express	11
	Rainbow Rider Transit	165
	Rock County Heartland Express	24
	SEMCAC/Rolling Hills Transit	43
	SMART	117
	Timber Trails Public Transit	50
	Trailblazer Transit	140
	Tri-Cap Transit Connection	135
	Tri-Valley Heartland Express	50
	Wadena County Friendly Rider	51
	Watonwan Take Me There	25
	Western Community Action	63
White Earth Transit	58	
Small Urban	Benson Heartland Express	25

Transit System Type	Transit Provider	Survey Respondents
	Granite Falls Heartland Express	45
	Hibbing Area Transit	34
	Le Sueur Heartland Express	41
	Morris Transit	42
	St. Peter Transit	42
	Winona Public Transit	92
Urbanized	Duluth Transit Authority	1,214
	East Grand Forks Transit	17
	La Crescent Apple Express	54
	Mankato-Greater Mankato Transit	625
	Moorhead Metropolitan Area Transit	50
Other	North Star Link	52

## Respondent Demographics

As shown in Figure 2, respondents covered the spectrum of age ranges, with the highest amount (21%) ages 18–24, 18% age 65 or older, and 16% ages 55–64. Seventy-seven percent of respondents fall within the category considered as “commuter age” (ages 18–64).

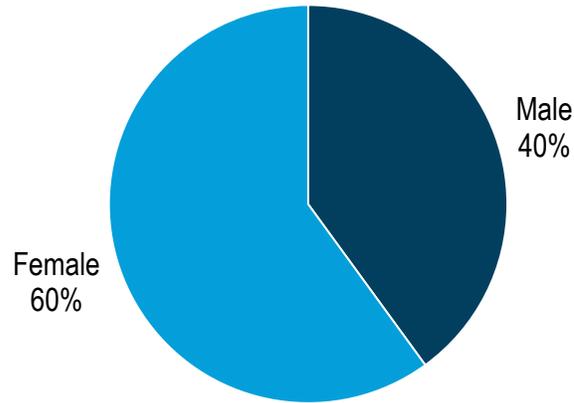
Figure 2 Respondent Age



n = 4,978

Figure 3 shows the shares of respondent's gender, of which over half (60%) are female.

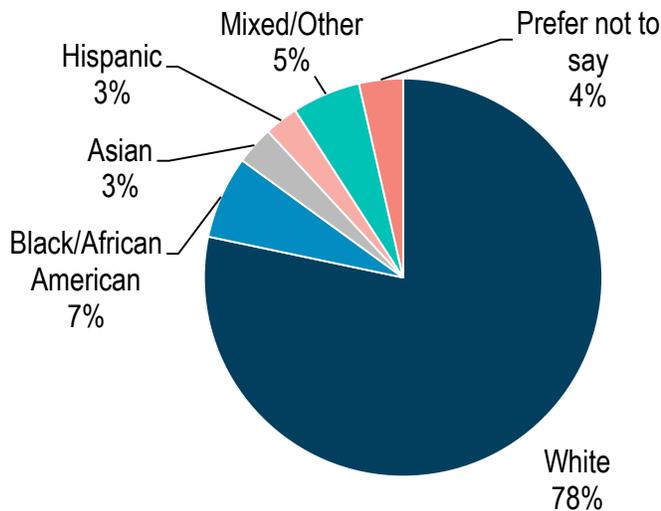
**Figure 3 Respondent Gender**



n = 4,966

The ethnicity of survey respondents generally matches the overall statewide demographics, as shown in Figure 4. More than three-quarters of survey respondents (78%) classify themselves as White, with shares of Black/African-American, Mixed/Other, Asian, and Hispanic respondents ranging from 7% to 3%.

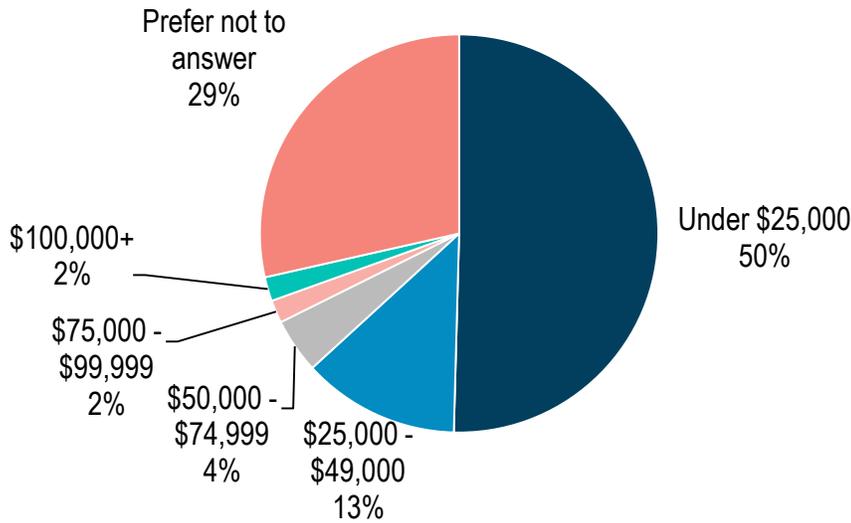
**Figure 4 Respondent Ethnicity**



n = 4,986

Figure 5 reveals that more than 60% of respondents make less than \$50,000 per year. Only 8% of respondents make more than \$50,000 per year; however just under a third of respondents (29%) selected “Prefer not to answer” about their total annual household income. Of the respondents who selected to disclose their income, a vast majority (88%) fell within the two lowest categories.

**Figure 5 Total Annual Household Income**

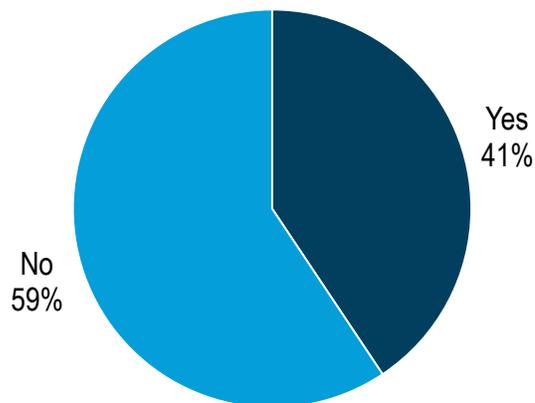


n = 4,801

## Respondent Attributes

As shown in Figure 6, more than half of survey respondents (59%) do not possess a driver’s license.

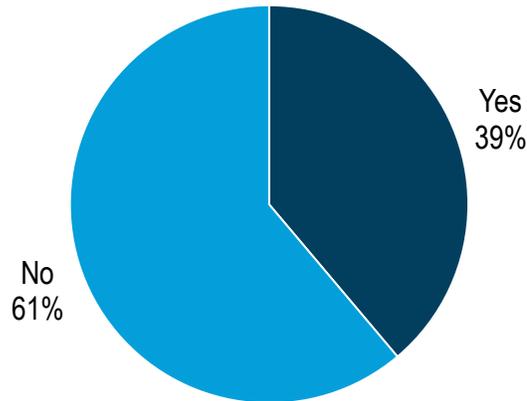
**Figure 6 Respondents with Driver’s License**



n = 4,901

As shown in Figure 7, more than half of respondents (61%) do not have a disability.

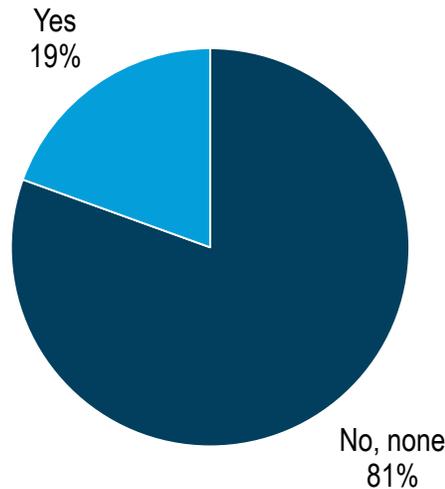
**Figure 7 Respondents with Disabilities**



n = 4,856

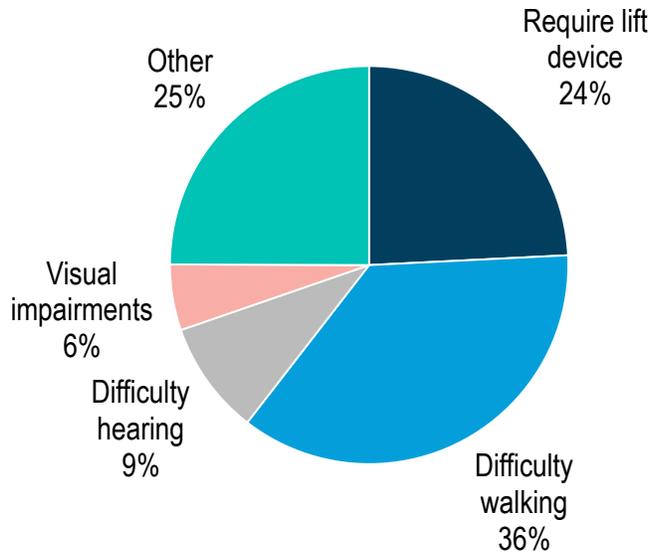
Comparatively, only 19% of respondents indicate having a physical condition that requires assistance to use transit (see Figure 8). Of those who do have a condition, more than one-third (36%) indicate having difficulty walking, while almost a quarter (24%) require use of a lift device. Of the quarter of respondents who indicate “Other” conditions, a majority utilize a walking device or have developmental disabilities that require assistance (see Figure 9).

**Figure 8 Respondents with Physical Conditions that Require Assistance to Use Transit**



n = 4,899

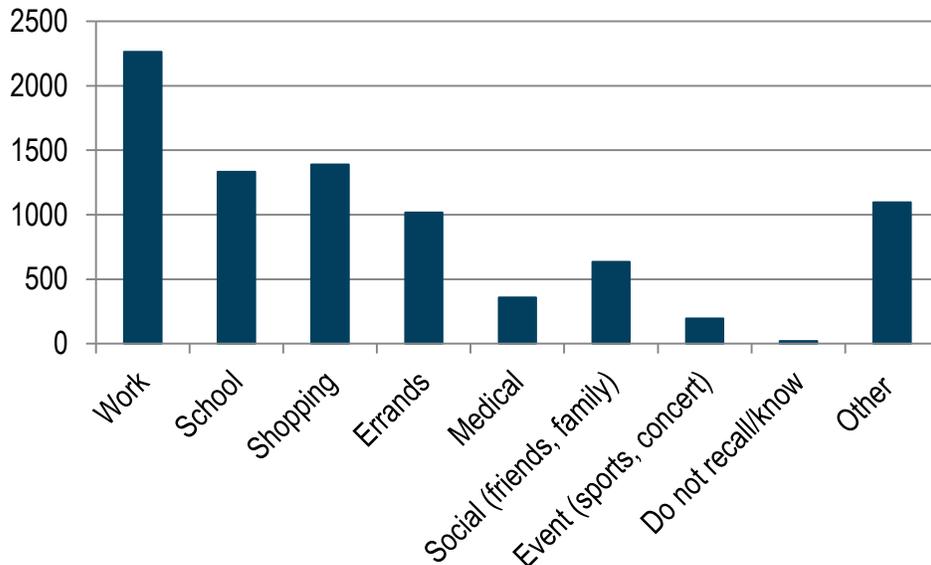
**Figure 9 Physical Conditions that Require Assistance to Use Transit**



n = 954

As shown in Figure 10, respondents were asked to indicate which trip destinations they primarily access by transit. The most cited destination is “Work,” followed by “Shopping,” accounting for 44% and 27% of respondents, respectively. Twenty-seven percent of respondents use transit to access school, and 20% use transit to perform errands. Of the 21% of respondents that cited “Other,” common destinations include senior centers, churches, and banks.

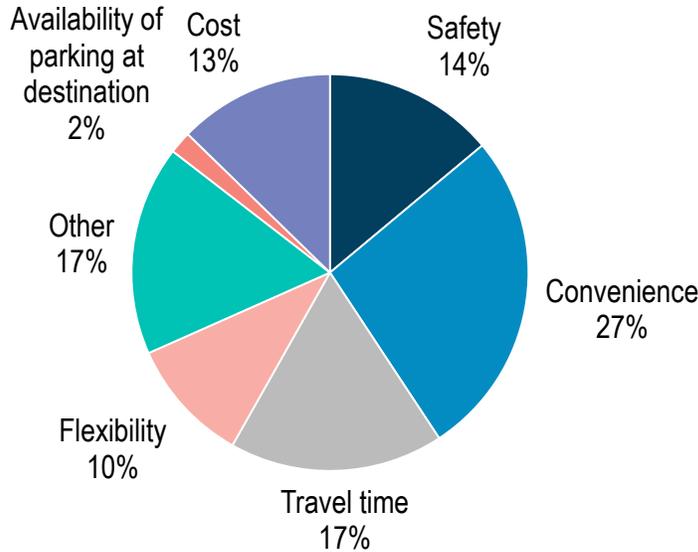
**Figure 10 Primary Trip Destinations for Transit**



n = 5,216

As shown in Figure 11, convenience is the primary factor in mode choice for more than a quarter of respondents (27%), followed by travel time (17%), and safety (14%).

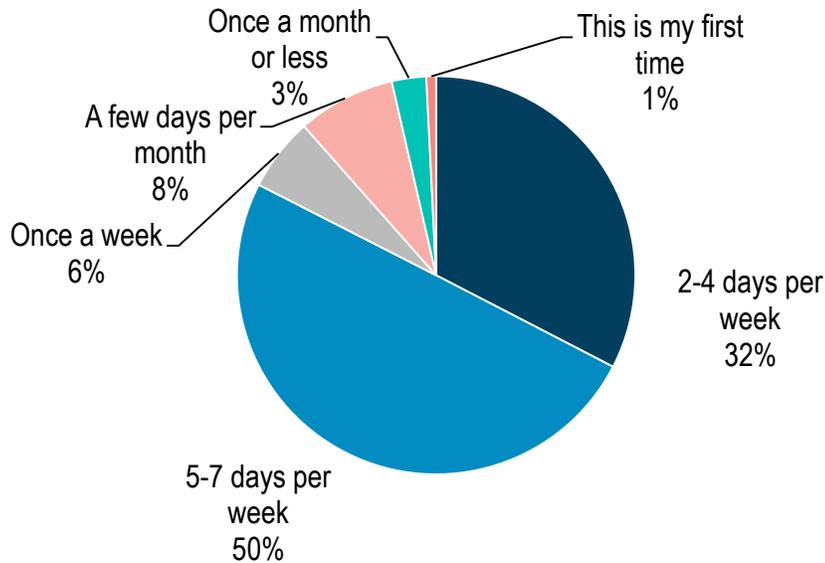
**Figure 11 Primary Factor in Mode Choice**



n = 4,935

As shown in Figure 12, half of respondents (50%) ride transit five days a week or more, with 82% of respondents riding transit at least twice a week. Only 12% of respondents ride transit less than once a week.

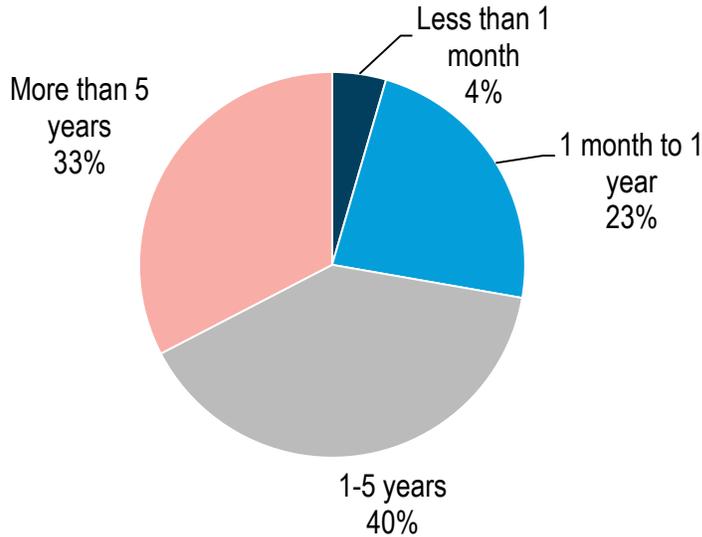
**Figure 12 Frequency Riding Transit**



n = 5,193

As shown in Figure 13, 73% of respondents have been riding transit for at least one year, with a third (33%) riding transit in Greater Minnesota for more than five years. Although a majority of respondents have a considerable tenure of use, over a quarter (27%) have only used transit for the last year, showing that transit is reaching new markets.

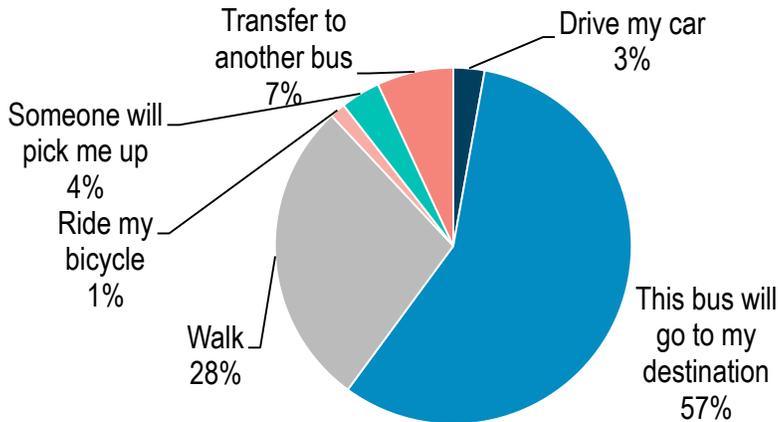
**Figure 13 Time Using Transit Service**



n = 5,056

As shown in Figure 14, more than half of respondents (57%) ride transit directly to their destination, and 28% walk. Since a large number of Greater Minnesota’s rural systems provide curb-to-curb service, it is not surprising that a high percent of riders will arrive exactly at their destination. The high level of respondents who arrive directly at their destination or walk from their stop indicates an importance for prioritizing investments such as sidewalk and crosswalk improvements near transit facilities.

**Figure 14 Last-Mile Mode Choice**

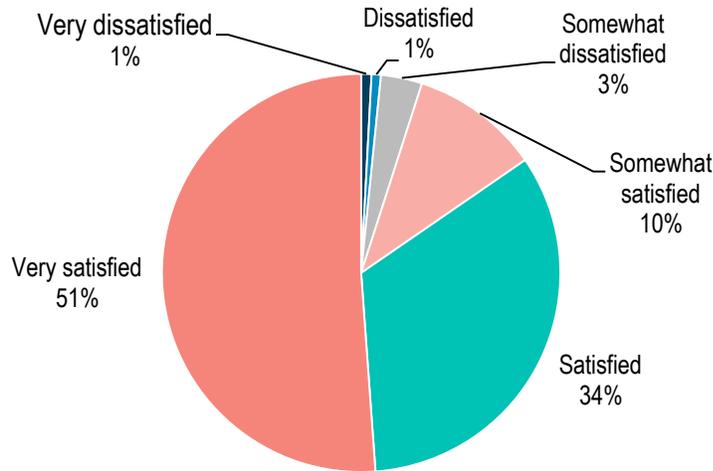


n = 4,742

## Attitudes and Opinions

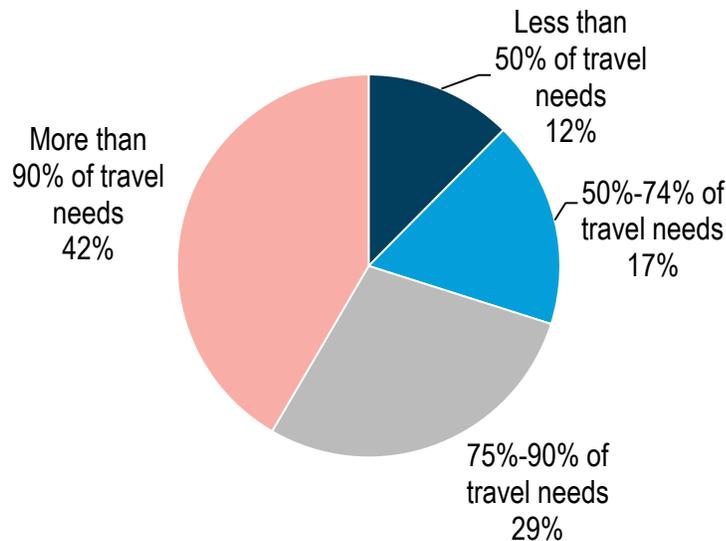
Overall, respondents indicate a high level of satisfaction with transit service availability in their community. Eighty-five percent of respondents indicate being “Satisfied” or “Very Satisfied,” and only 5% of respondents indicate a level of satisfaction less than “Somewhat Satisfied.” (see Figure 15). Correspondingly, almost three-quarters (71%) of respondents indicate that at least 75% of their travel needs are served by transit (see Figure 16).

**Figure 15** Satisfaction with Transit Service Availability in Community



n = 5,138

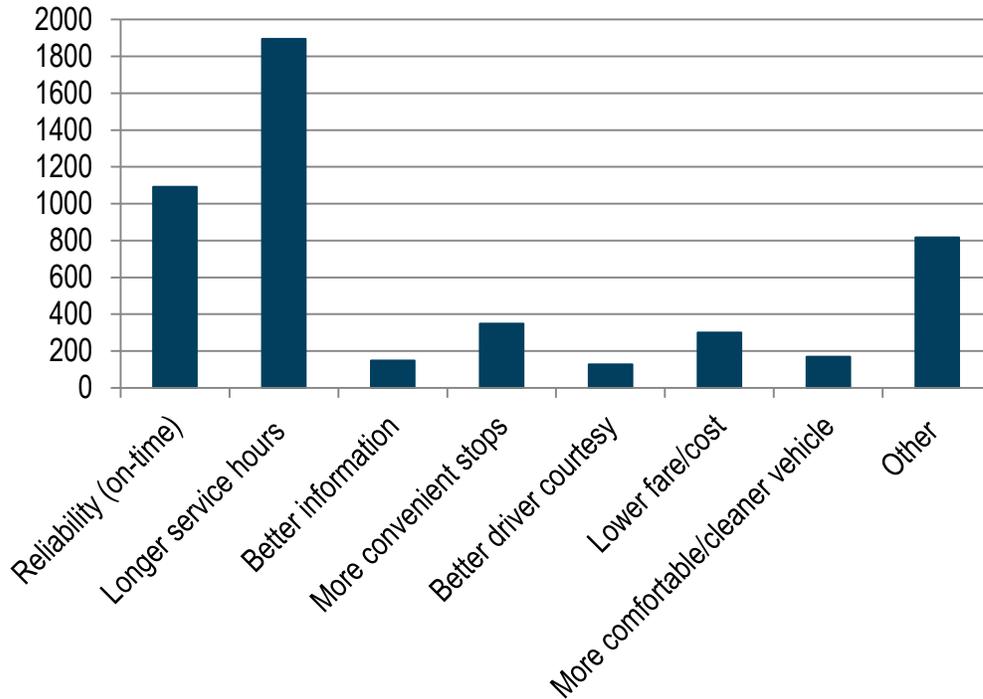
**Figure 16** Percentage of Travel Needs Served by Transit



n = 4,364

As shown in Figure 17, respondents were asked to indicate what improvements would make them more likely to ride transit. The most cited improvement is “Longer Service Hours,” followed by “Reliability,” accounting for 42% and 24% of respondents, respectively. Of the 18% of respondents that cited “Other,” the most common comments ask for either longer service hours or provision of service on weekends.

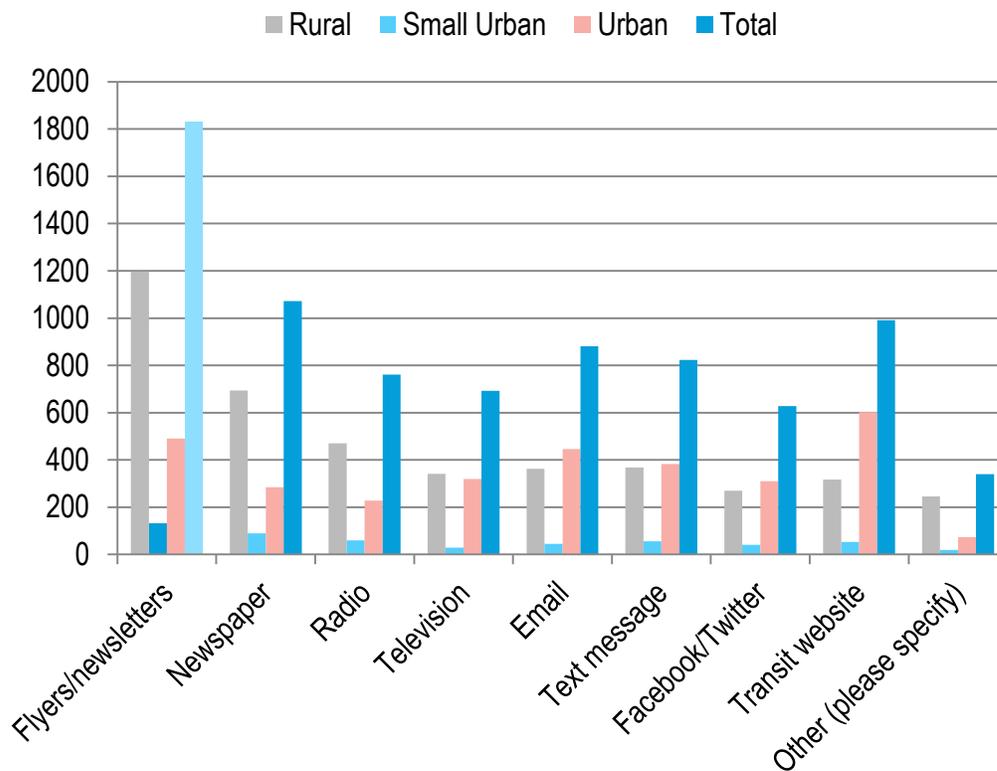
**Figure 17 Preferred Improvements to Transit Service**



n = 4,468

Figure 18 shows respondents’ preferred methods of receiving transit information. With 40% of respondents, flyers/newsletters is the preferred method of receiving transit information, followed by newspapers (24%), and transit websites (22%). Social media platforms such as Facebook and Twitter were only cited by 14% of respondents, less than more traditional mediums such as radio (17%) and television (15%).

Figure 18 Preferred Method to Receive Transit Information



n = 4,538

## RESULTS BY TRANSIT SYSTEM TYPE

Service needs vary based on context; for example, income levels, distance between destinations, or passenger demographics are different in rural versus urban areas. This section cross-analyzes responses based upon the service provider’s land use context—urban, small urban, or rural.

### Urbanized Systems

Differences between the results of urbanized systems and the statewide aggregate are presented in Table 3 and Table 4. Riders of urbanized systems differ from the statewide aggregate as follows:

- They are more likely to be between the ages of 18 to 34, and less likely to be age 65+.
- They are more likely to primarily access work or school by transit.
- They ride transit more frequently.
- They are more likely to have a driver’s license, and less likely to have a physical condition that requires assistance.

**Table 3 Demographic and Behavioral Differentials – Urbanized Systems**

Attribute		Statewide Aggregate	Urbanized Systems
Age	18-34	35.4%	57.9%
	65+	18.1%	6.0%
Ride Transit to Work or School		65.0%	80.0%
Ride Transit 5–7 Days per Week		49.9%	66.7%
Don't Have Driver's License		59.4%	41.1%
Physical Condition does not Require Assistance		80.5% have no impairments	93.7% have no impairments

Total Statewide Aggregate n = 5,297

Total Urbanized Systems n = 1,960

Riders of urbanized systems have a higher level of satisfaction with transit service than the already high statewide aggregate, despite a smaller share of respondents indicating that at least 75% of their travel needs are met by transit. Preferred changes to transit service were nearly identical to the statewide aggregate. This group exhibited a greater preference for receiving information through transit websites.

**Table 4 Attributes, Opinions, and Attitudes – Urbanized Systems**

Attribute	Statewide Aggregate	Urbanized Systems
Level of Satisfaction with Transit Service	95.1% Very Satisfied to Somewhat Satisfied	98.4% Very Satisfied to Somewhat Satisfied
Percent of Needs Served by Transit	70.1% More than 75 percent of needs served	66.2% More than 75 percent of needs served
Preferred Changes to Transit Service*	42.4% Longer Service Hours 24.4% Reliability (On-time)	43.9% Longer Service Hours 22.7% Reliability (On-time)
Preferred Medium for Receiving Transit Information*	40.3% Flyers/Newsletters 21.9% Transit Website	28.5% Flyers/Newsletters 35.1% Transit Website

Total Statewide Aggregate n = 5,297

Total Urbanized Systems n = 1,960

\* Multiple answers permitted, percentages reflect the share of respondents who selected an option

## Small Urban Systems

Differences between the results of small urban systems and the statewide aggregate are presented in Table 5 and Table 6. Riders of small urban systems differ from the statewide aggregate as follows:

- They are less likely to be between the ages of 18 to 34, and more likely to be age 65+.
- They are less likely to primarily access work or school by transit.
- They are less likely to ride transit five or more days per week.
- They are less likely to have a driver's license, and less likely to have a physical condition that requires assistance.

**Table 5 Demographic and Behavioral Differentials – Small Urban Systems**

Attribute		Statewide Aggregate	Small Urban Systems
Age	18-34	35.4%	27.7%
	65+	18.1%	20.4%
Ride Transit to Work or School		65.0%	57.0%
Ride Transit 5–7 Days per Week		49.9%	43.5%
Don't Have Driver's License		59.4%	61.2%
Physical Condition does not Require Assistance		80.5% have no impairments	83.9% have no impairments

Statewide Aggregate n = 5,297      Small Urban Systems n = 321

Riders of small urban systems have a marginally higher level of satisfaction with transit service than the statewide aggregate, despite a smaller share of respondents indicating that at least 75% of their travel needs are met by transit. Preferred changes to transit service were slightly in greater favor for longer service hours and less in favor of improved reliability compared to other system types. Riders of small urban systems show a greater preference for receiving transit information by flyers/newsletters and newspapers compared to the statewide aggregate.

**Table 6 Attributes, Opinions, and Attitudes – Small Urban Systems**

Attribute	Statewide Aggregate	Small Urban Systems
Level of Satisfaction with Transit Service	95.1% Very Satisfied to Somewhat Satisfied	95.7% Very Satisfied to Somewhat Satisfied
Percent of Needs Served by Transit	70.1% More than 75 percent of needs served	69.0% More than 75 percent of needs served
Preferred Changes to Transit Service*	42.4% Longer Service Hours 24.4% Reliability (On-time)	45.4% Longer Service Hours 17.0% Reliability (On-time)
Preferred Medium for Receiving Transit Information*	40.3% Flyers/Newsletters 23.6% Newspaper	45.3% Flyers/Newsletters 31.4% Newspaper

Statewide Aggregate n = 5,297      Small Urban Systems n = 321

\* Multiple answers permitted, percentages reflect the share of respondents who selected an option

## Rural Systems

Differences between the results of rural systems and the statewide aggregate are presented in Table 7 and

Table 8. Riders of rural systems differ from the statewide aggregate as follows:

- They are less likely to be between the ages of 18 to 34, and more likely to be age 65+.
- They are less likely to primarily access work or school by transit.
- They are less likely to ride transit five or more days per week.
- They are less likely to have a driver's license, and more likely to have a physical condition that requires assistance.

**Table 7 Demographic and Behavioral Differentials – Rural Systems**

Attribute		Statewide Aggregate	Rural Systems
Age	18-34	35.4%	21.5%
	65+	18.1%	26.1%
Ride Transit to Work or School		65.0%	56.0%
Ride Transit 5–7 Days per Week		49.9%	39.5%
Don't Have Driver's License		59.4%	71.9%
Physical Condition does not Require Assistance		80.5% have no impairments	71.2% have no impairments

Statewide Aggregate n = 5,297 Rural Systems n = 2,964

Riders of rural systems have a higher level of satisfaction with transit service than the statewide aggregate, and are more likely to have at least 75% of their travel needs served by transit. Preferred changes to transit service were similar to that of the statewide aggregate, with the greatest share of riders recommending longer service hours and improved reliability. Riders of rural systems show a greater preference for receiving transit information by flyers/newsletters and newspapers compared to the statewide aggregate and the lowest level of preference for mediums such as transit websites and social media.

**Table 8 Attributes, Opinions, and Attitudes – Rural Systems**

Attribute	Statewide Aggregate	Rural Systems
Level of Satisfaction with Transit Service	95.1% Very Satisfied to Somewhat Satisfied	96.2% Very Satisfied to Somewhat Satisfied
Percent of Needs Served by Transit	70.1% More than 75 percent of needs served	73.7% More than 75 percent of needs served
Preferred Changes to Transit Service*	42.4% Longer Service Hours 24.4% Reliability (On-time)	41.0% Longer Service Hours 26.8% Reliability (On-time)
Preferred Medium for Receiving Transit Information*	40.3% Flyers/Newsletters 23.6% Newspaper	48.2% Flyers/Newsletters 28.0% Newspaper

Statewide Aggregate n = 5,297 Rural Systems n = 2,964

\* Multiple answers permitted, percentages reflect the share of respondents who selected an option

## OTHER ON-BOARD SURVEYS

A few Greater Minnesota transit operators in urbanized areas recently conducted their own on-board surveys as part of the long-range transportation plan process. In regard to demographics, the two additional surveys were relatively consistent with the statewide survey responses in terms of ethnicity, gender, and income levels. The key trends and outcomes from these surveys are summarized below.

## Rochester Public Transit

Many of the questions from the Rochester Public Transit (RPT) on-board survey differ from that of the Greater Minnesota on-board survey; however, the results reveal some similar trends to that of Greater Minnesota as a whole. A total of 1,287 valid survey responses were collected.

Results from the RPT survey that are consistent to that of the Greater Minnesota effort include the following:

- Seventy-nine percent of respondents primarily access work or school through transit. Although this figure is higher than the statewide aggregate of 65%, it is near identical to the figure for respondents of only urbanized systems (80%), of which RPT is one.
- RPT respondents show a slightly higher frequency of transit use compared to the statewide aggregate. Seventy-four percent of respondents ride RPT at least four days a week compared to 50% of statewide riders who ride transit at least five days a week. Ninety-five percent of RPT respondents ride transit at least once a week compared to 88% of respondents statewide.
- RPT respondents show a similar tenure of transit use to the statewide aggregate, with 70% of respondents having ridden RPT for at least a year (3% less than the statewide aggregate) and 31% utilizing RPT for more than five years (2% less than the statewide aggregate).
- Similar to the results of the statewide average, increased hours and days of service are the most desired improvements to transit for RPT riders.

RPT survey results that differ considerably from the Greater Minnesota results include the following:

- Seventy-six percent of RTP survey respondents indicate a higher “Walk” mode share as last-mile connection compared to 28% in the GMTIP survey.
- Almost a third of RTP survey respondents (30.9%) indicate that the availability of parking is the primary reason for their use of transit; this contrasts to just 2% of statewide respondents who consider “Availability of parking at destination” as the primary factor for mode choice. This reflects the City of Rochester’s limited downtown parking, and the effect it has on peoples’ mode choice.

These differentials make sense given the urbanized land use context of Greater Rochester compared to most communities in Greater Minnesota.

## Saint Cloud Metro Bus

Saint Cloud Metro Bus conducted an on-board survey on the days of Wednesday, September 9 and Thursday, September 10, 2015 as part of an update to the Saint Cloud Long-Range Transit Plan. A total of 420 valid survey responses were collected.

Results from the Saint Cloud survey that are consistent to that of the Greater Minnesota survey include the following:

- Seventy-one percent of respondents primarily access work or school through transit. This figure is slightly higher than the statewide figure of 65%.
- Twenty-two percent of respondents have been riding transit for less than a year compared to 27% of respondents in the statewide aggregate. Thirty-one percent of respondents

- indicate riding Metro Bus for more than six years, two percentage points less than the statewide aggregate of respondents who indicate riding transit for more than five years.
- Eighty-six percent of respondents do not have a mobility issue, compared to 81% of statewide aggregate respondents that do not have a physical condition that requires assistance to use transit.

Saint Cloud survey results that differ considerably from the statewide aggregate include the following:

- Seventy-seven percent of respondents ride transit at least five days a week compared 50% of riders statewide, showing heavy reliance on transit for Saint Cloud users.
- Similar to the results of the RPT survey, Saint Cloud Metro Bus riders indicate having a much higher “Walk” mode share as a last-mile connection to and from transit stops. Ninety-one percent of Saint Cloud Metro Bus riders walk to and from their bus stop compared to just 28% of Greater Minnesota transit riders statewide.

## Fargo-Moorhead MATBUS

Moorhead transit conducted an onboard survey in March, 2015 as part of the Transit Development Plan. A total of 1,646 surveys were collected. The results of the Moorhead survey are consistent with the other Greater Minnesota urban transit systems.

- 47% of riders are 18-24 years old, more than the statewide age-group response (21%), but consistent with other university towns.
- When asked about frequency of riding transit, 25% of riders use transit 3-5 times a week, 20% ride 1-2 times a week.
- 36% of respondents have been riding for 1-3 years while 27% have been riding for less than a year. These are consistent numbers to the statewide onboard survey.
- When asked about destinations for travel, nearly 61% ride for school trips, 50% for work trips, 47% for shopping destinations and roughly 29% each for health services and entertainment.
- 61% of respondents felt the service provides access to nearly all their destinations, compared with 42% of Greater Minnesota responders.
- When asked for the reason to choose transit for travel, 52% said to save money, 41% because of parking challenges and 35% had no other means of transportation. The percentage of those who ride to save money and because of parking challenges are higher than the Minnesota statewide results of 14% for cost and 1% for parking.
- Similar to the Greater Minnesota Onboard survey, respondents were asked about investment priorities. MATBUS results were similar to the overall survey indicating a preference for:
  - Later evening service, specifically until 12:15 a.m.
  - More frequent service during the weekday
  - More service on Saturdays
  - More service to downtown areas, the airport, and employment centers



## CONCLUSION

The findings of the on-board survey provide valuable insights to the composition of the existing transit market in Greater Minnesota. The results point to noteworthy differences in the profiles and behaviors of riders between the three different system types explored in this plan (rural, small urban, and urban). However, despite these differences many attitudes and opinions about existing transit service in Greater Minnesota resonate between riders in communities large and small.

Overall, the survey results reveal that transit users in Greater Minnesota are majority female, White, and low-income. More than a three quarters of riders fall within the category of “commuter age” (18–64) and more than half do not possess a driver’s license. This can help transit agencies target marketing and services toward these constituencies. A significant chunk of riders (about one-quarter) have been riding for less than one year, showing that transit may be appealing to a broad audience in Greater Minnesota.

While many characteristics transcend service types, a dichotomy exists, particularly between rural riders compared to their small urban and urbanized counterparts. Rural riders are considerably more likely to be elderly, without a driver’s license, disabled, and dependent on transit for trips other than work or school. Rural riders are also considerably less likely to ride transit on a daily basis compared to riders in small urban or urbanized communities.

In terms of attitudes and opinions, transit operators across Greater Minnesota garnered high levels of satisfaction from riders in all communities. As a whole, riders expressed a sincere desire for longer service hours, improved reliability, and introduction of weekend service. In regard to transmission of transit information, users exhibited a preference for traditional sources of media such as flyers/newsletters and newspapers compared to methods such as social media, text message, and email.