Intercity Transit 2015

Market Segmentation Survey

Final Report

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Methods

Transit market segmentation surveys were conducted for Intercity Transit by CJI Research in 2004, 2008 and 2015. Each survey was conducted by telephone by professional interviewers. The 2015 survey replicated some of the design and many of the questions, used in similar surveys in 2008 and 2004. There were major differences, however, necessitated by changes in telephone technology and markets since 2008.

Changing from "RDD" to "ABS." The most important difference is in the sampling which had to be changed as a result of the rapid spread of "cell-phone-only households" since 2008. In 2015, the societal change in the communication structure of the nation required a change in the sampling methodology compared to earlier surveys. Specifically, it meant changing the sampling approach from "Random Digit Dialing" (RDD), to Address-Based Sampling (ABS) and the inclusion, of a large (45%) proportion of interviews conducted by with a sample of cell phone users.

For at least thirty years, survey sampling relied on a process of sampling telephone numbers, not persons, and not addresses of households. It was based on two assumptions: (1) that virtually all households had a telephone, and (2) that the telephone was associated with a known location – a fact that meant that small geographic areas could be sampled using this method. This method was referred to as "random digit" sampling. To simplify what is actually a rather complex process, let us say simply that within area codes, long sequences of telephone numbers and their prefixes (referred to as "blocks") for landline telephones, but not for mobile phones, are assigned to fixed geographic areas. To know a landline phone number is to be able to place its location with considerable accuracy without prior knowledge of the address to which it was assigned. Thus, generating random ten digit numbers within those sequences allowed the researcher to randomly sample households in a known geographic area such as a county, city, or set of census tracts. This made sampling a statistical process that was simple and inexpensive. It was, that is, until the rapid adoption of mobile phones occurred and the connection of a phone number to a fixed address no longer prevailed.

The disconnect occurred not only because mobile phones are, in fact, mobile. It occurred because the old relationship between the assignment of phone numbers to known geographic areas no longer could be used with mobile technology.

Mobile phone numbers are assigned according to the "switching station" nearest to where a phone and associated service contract are purchased. In a relatively small city such as Olympia, especially those with larger cities nearby, the locations of these switching stations is a very poor guide to the actual location of the cell phones in use in the small city. In practical terms for sampling, this means that the cell numbers cannot accurately be pinpointed to a small geographic area as they can be with landlines. The problem is the small area. For a national or even a statewide survey in most states, sampling cell-phones is relatively easy since the location of the respondents within the large area is generally immaterial. However, for a local area survey, it is a challenge.

The problem is that in the Intercity Transit Market Segmentation Survey, the area to be surveyed is small. It is necessary to be sure that the respondents reside in the area under study. Random dialing of cell numbers in a sample confined to small areas such as tracts or even a county is simply not feasible to accomplish that.

Thus, the rapid adoption of smartphones and the rapid increase in cell-phone only households between 2008 and 2015 forced a fundamental change in the sampling strategy in 2015. A large proportion of cell phones had to be included in the sample for it to be representative of the population because those

who continue to use landlines tend to be older persons. A landline sample would not fully represent the population[1].

For these reasons there had to be a fundamental change of sampling strategy from random digit dialing to address based sampling (ABS) which bases the sample not on phone numbers but on sampling physical addresses of households within the known service area of Intercity Transit. A sample of addresses was drawn and then matched to telephone numbers.

Until 2015, it was not feasible to match cell phone numbers to addresses with any level of accuracy. However, recently, major companies specializing in survey sampling such as the firm used for this study (Marketing Systems Group) have purchased access to massive private and public databases and have developed algorithms to match address to a cell phone number with reasonable accuracy. Screening is still necessary to be sure of the location of the respondent. However, the procedure works well enough that the process is reasonably cost effective.

The bottom line is that the final sample includes 45% cell interviews and all respondents are known to be located within the census tract boundaries provided by Intercity Transit. Moreover, the inclusion of a high proportion of cell phone sample assured that the resulting interviews would not be dramatically skewed toward the older population which continues to maintain landline telephone service, but would adequately represent the younger population which is more likely to use mobile phones exclusively.

Figure 1 PEW Research Center study of declining response rates

Surveys Face Growing Difficulty Reaching, Persuading Potential Respondents

	1997 %	2000 %	2003 %	2006 %	2009 %	2012 %
Contact rate (percent of households in which an adult was reached)	90	77	79	73	72	62
Cooperation rate (percent of households contacted that yielded an interview)	43	40	34	31	21	14
Response rate (percent of households sampled that yielded an interview)	36	28	25	21	15	9

PEW RESEARCH CENTER 2012 Methodology Study. Rates computed according to American Association for Public Opinion Research (AAPOR) standard definitions for CON2, COOP3 and RR3. Rates are typical for surveys conducted in each year.

Every community survey differs in various ways from previous surveys, a fact that made comparing results from the 2015 survey to earlier surveys particularly challenging. Several factors caused this. First, the inclusion of a high proportion of cell phone numbers required certain separate approaches to interviewing, and resulted in a higher proportion of younger people than in previous surveys.[2] Second, the change from an RDD to an ABS approach would have unknown effects on the comparative distributions of the respondents throughout the PBTA. Third, refusal rates in telephone surveys have increased dramatically in the past ten years as caller ID has become the norm and as every business seems to have decided that it must conduct a survey after every customer interaction, as Figure 1 makes clear. Survey fatigue has set in. For these reasons, one can expect that the results of surveys conducted in the pre-mobile phone era will differ significantly from surveys conducted subsequently.

[1] In 2008 cell phone users had been also included, but only incidentally because the typical cell phone user still resided in a household that also had a landline and could be reached via the landline. There was no separate cell phone sample at that time or previously in 2004. In 2015, the proposed cell phone target sample was initially to be 30%. However, but that was increased to 45% because at 30% CJI's monitoring showed that the sample was skewing too old as interviewing continued.

[2] The FCC requires that cell phone numbers be manually dialed, not speed-dialed or machine dialed, under significant financial penalties for violations. Ethics and liability concerns also require that the respondent is asked questions about being in a safe location and able to speak openly.

Nevertheless, a substantial body of literature has documented that surveys such as this Market Segmentation Survey, conducted in a rigorous manner as to sampling and calling procedures continue to provide accurate representation of public attitudes and behaviors. The interested reader should consult the studies by PEW and others that indicate that the survey method, rigorously conducted, retains validity, though it faces increasing challenges. To quote one PEW study:

> *A new study by the Pew Research Center for the People & the Press finds that, despite declining response rates, telephone surveys that include landlines and cell phones and are weighted to match the demographic composition of the population continue to provide accurate data on most political, social and economic measures. This comports with the consistent record of accuracy achieved by major polls when it comes to estimating election outcomes, among other things.* (http://www.people-press.org/2012/05/15/assessing-the-representativeness-of-public-opinion-surveys/)

Weighting. Besides the rigorous approach to sampling and calling, statistical weighting is also required which makes the results reasonably comparable to the earlier surveys for purposes of measuring changes at least approximately. Weighting is based on the earlier findings. It is based instead on three factors: (1) Respondents' age distribution, (2) Respondent geography, (3) the percentage of potential riders in the adult population. Age, and geographic location were measured by reference to data from the Bureau of the Census so that there would be a reference base consistent with the earlier surveys. The potential for using public transit was measured based on prevalence as measured by the subsample completed prior to the time at which selections had to be made to complete the intentional oversample of potential riders. A statistical method called "Raking" was used to combine correct proportions of age, geographic location, and potential for using public transit.

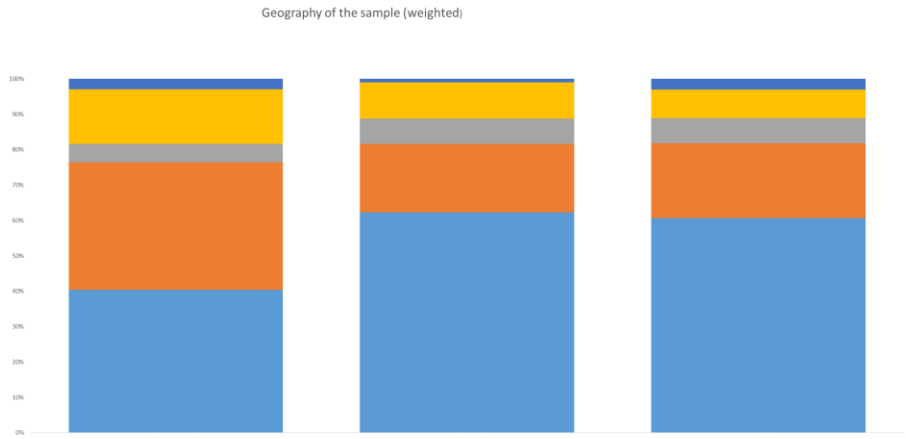
Weighted geographic distribution of the sample

The total sample size is 797 respondents. The sample includes an oversample of 376 "potential riders."[3] These are respondents whose patterns of responses indicate that they are attitudinally willing to consider using public transit on a regular basis under some circumstances.

When weighted for location, potential ridership and age, the resulting sample is geographically quite different from the samples of 2004 and 2008. The sample in 2004 and 2008 were both weighted to approximate the population distribution as shown in the Census of 2000. In 2015, the data are weighted using the American Community Survey and the 2010 Census. The 2015 results reflect the growth of Tumwater and Lacey and the relative stability of Olympia in that period. Although Olympia did not decline in population between 2008 and 2015 (it grew by roughly 3%), Lacey, for example, grew by more than 22%, meaning that as a share of the population in the PBTA, Olympia in effect declined while its two major suburbs grew in terms of share of the population (see Figure 2).

[3] An initial target of 400 proved impossible to reach within budget although the sample was expanded from the initial 700 to 797.

Figure 2 Weighted geographic distribution of the sample



	2015	2009	2005
Other areas of Thurston County	3%	1%	3%
Tumwater	15%	10%	8%
Yelm	5%	7%	7%
Lacey	36%	19%	21%
Olympia	40%	61%	60%

Differences between the Customer Satisfaction and Market Segmentation Surveys

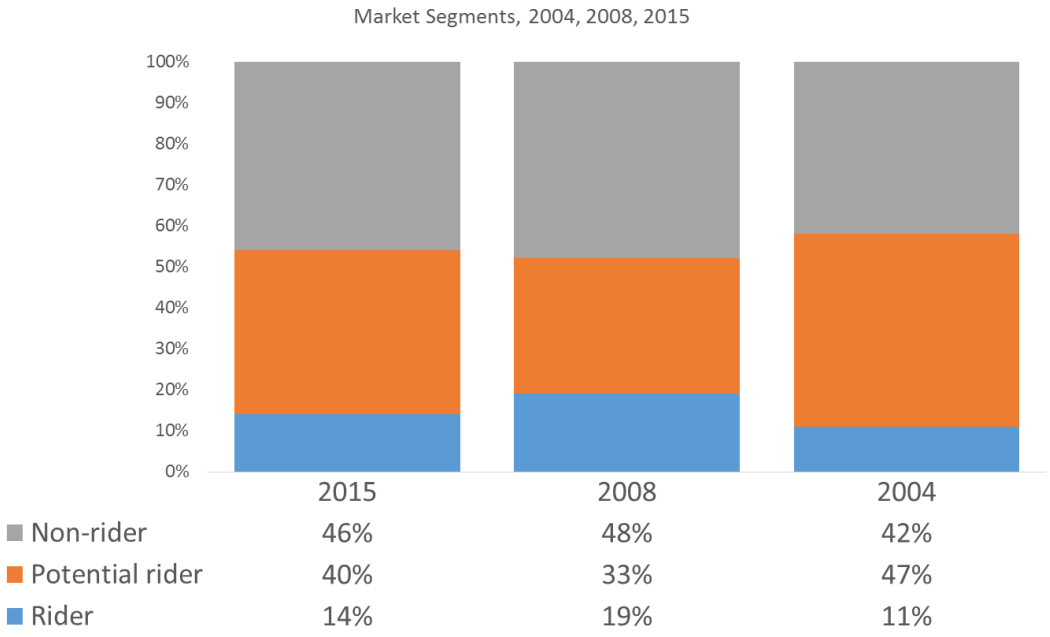
The Market Segmentation Survey is one of three surveys conducted as part of an overall market research program for Intercity Transit in 2015. These included a Vanpool Survey of existing vanpool riders, a Customer Satisfaction Survey of riders intercepted for surveying on the buses, and this Market Segmentation Survey. The Vanpool Survey was specialized, focusing on only Intercity Transit vanpool users. However, there is some overlap between the Customer Satisfaction Survey and the Market Segmentation Survey.

By definition, the Customer Satisfaction Survey deals only with current transit riders, known to be current riders because they were intercepted for the survey while riding on Intercity Transit buses. In contrast, the Market Segmentation Survey was conducted by telephone based on a sample of adults based on household addresses. Because it is a sample of the general adult public, it too contains some current transit users. However, the subsample of riders in the Market Segmentation Survey is fundamentally different from the sample of riders in the Customer Satisfaction Survey.

In the Market Segmentation Survey, the basis for sampling respondents is completely independent of the frequency with which an individual uses public transportation. That is, a person who rarely or never uses public transit is just as likely as one who uses it daily to be included in the market segmentation sample. However, the opposite is true in the customer satisfaction sample. In that survey all respondents are riders by definition. And the more frequently they use transit, the greater the odds that they will be sampled during the survey period. Therefore, the characteristics of riders in the Customer Satisfaction Survey will reflect the collective characteristics of those who regularly use public transit. The characteristics of riders in the Market Segmentation Survey will tend to reflect the ridership characteristics of cities in the PBTA, all of which will have a few frequent riders, some infrequent riders, and a great many who do not use transit at all.

The Market Segmentation Survey Report

Figure 3 Market segments, 2015, 2008, 2004



Market segments, 2015, 2008, 2004

The three market segments include those who currently ride public transit once a month or more, those who say that under some circumstances they would use public transit that often, and those who indicate they would never use public transit. These are referred to, respectively, as riders, potential riders, and non-riders.

How transit market segments are defined. Riders are defined primarily as those who said that their normal mode of transportation for local trips is the bus. In addition, riders include those who, although they normally use a mode other than the bus for local trips, also said that they have used the bus at least once a month during the past year.

Potential riders are defined by their response to the following questions.

- The first question was directed toward those who normally drive alone and involved whether they could perceive circumstances under which they could see themselves "… Using another way of getting around instead of driving alone, such as riding the bus, carpooling, vanpooling, riding a bike, or walking." If they indicated that they could see such circumstances, they were asked which mode they would choose. Those who said they would use the bus were classified as potential riders.
- Regardless of the transportation mode used most often, respondents were asked a third question. The question was: *"Let's say that the Intercity Transit local bus service came within a block or two of your home, ran frequently, and ran directly to within a block or two for you need to go anywhere and Olympia, Lacey, Tumwater, or Yelm. Thinking realistically, how likely would you be to use an Intercity Transit bus once a month or more --- very likely, somewhat likely, not very likely, or definitely would not."* Those respondents who volunteered that they definitely would use such an Intercity Transit service, and those who said they would be very or somewhat likely to do so were all considered potential riders. All others were considered non-riders, very unlikely to ever use Intercity Transit.

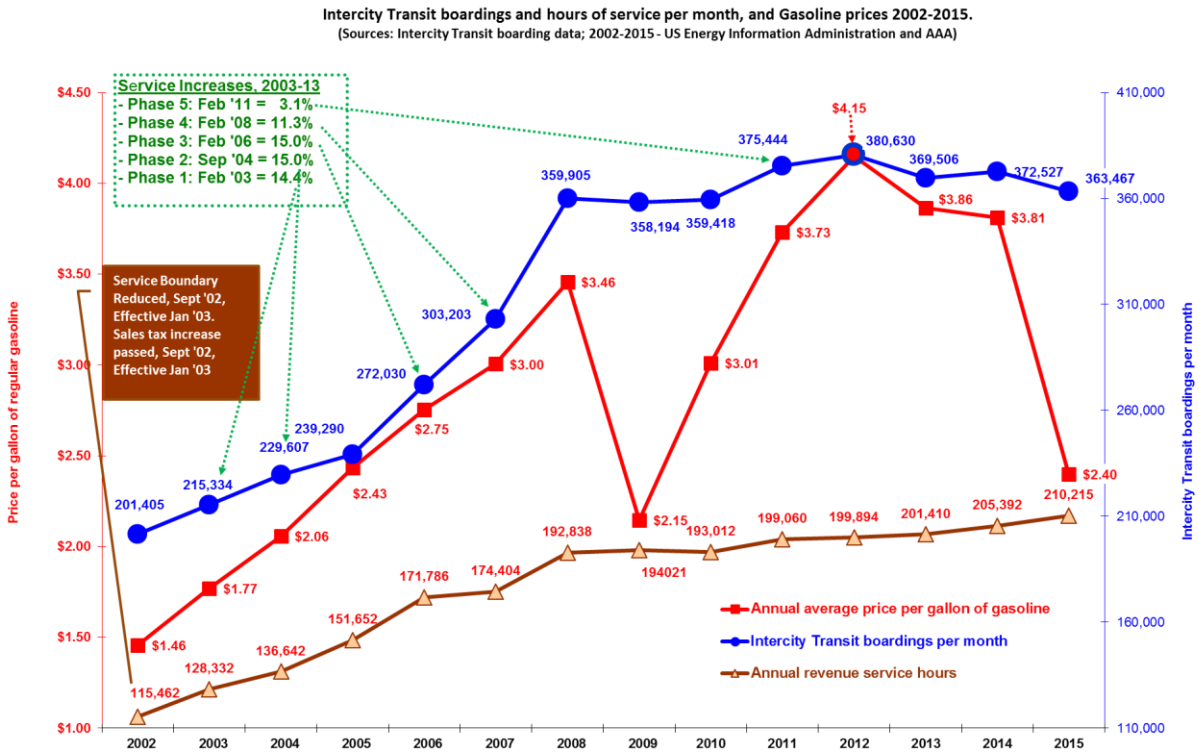
In the 2008 report, the charts exploring potential ridership were broken down into those potential riders who are commuters (as defined by being employed outside the home or a student), and those who were not commuters, by virtue of the fact that they were homemakers, retirees, or were unemployed and had no inherent reason to commute. However, this split approach added what we now regard as unnecessary complexity to the charts and was not sufficiently productive to warrant repeating it. Moreover, subdividing the potential riders in that manner would mean that the subsamples would become smaller and less reliable. For these reasons, in the 2015 report commuters and non-commuters who have behaviors or attitudes that classify them as potential riders are grouped together without regard to the purpose of their local travel.

[If Intercity Transit would find it useful to have tables that distinguish between commuting and non-commuting potential riders, those tables will be provided upon request.]

The proportions of these market segments have varied somewhat between 2004 and 2015. The greatest change occurred between 2004 and 2008 when the percent classified as riders jumped from 11% in 2004 to 19% in 2008. During that time, gasoline prices had risen to a peak of $3.46/gallon and Intercity Transit service had been increased in stages since 2003. With that combination of carrot and stick operating, ridership increased rapidly to a new peak in 2008.

By 2015, with the price of gasoline declining, the rider segment had slipped back somewhat to 14%, the potential ridership rose back to a level of 40%, and the 46% identified as non-riders remained more or less constant with the 48% of 2008. All of these changes are reflected in the actual record of ridership shown in Figure 4 on the following page.

Figure 4 Ridership, service expansion, and gasoline prices, 2002 to 2015



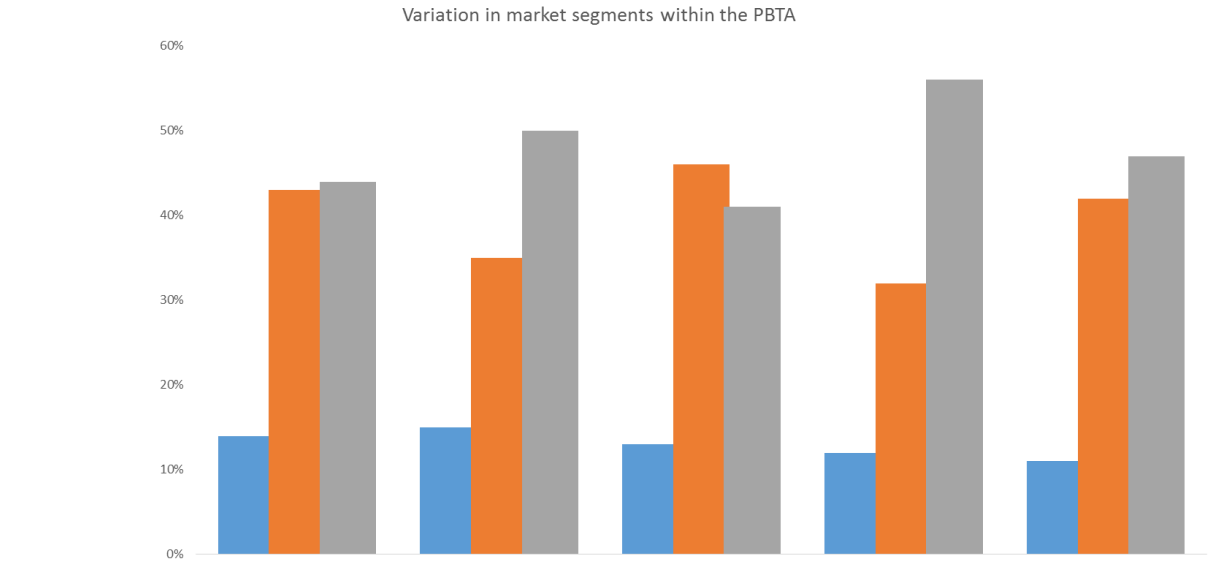
Ridership, service expansion, and gasoline prices, 2002 to 2015

In considering the profile of the market segments over time, it is useful to put observed changes in public transportation behavior into the perspective of changing parameters in which Intercity Transit operates and in which the public makes transportation choices. Figure 4 provides a picture of several factors influencing ridership: Increases in service, annual revenue service hours, gasoline prices, and ridership.

One of the notable aspects of this chart is that while the increases in ridership initially correlated strongly with the rise in gasoline prices, they also correlated even more closely, with increased levels of service. In fact, as gasoline prices collapsed in the early stages of the Great Recession, ridership dipped only slightly. And more recently, as gasoline process have again collapsed, ridership has dipped, but not to the extent that would be predicted if it were driven by only drivers' fuel costs. In fact the overall coefficient of correlation between the cost of gasoline and ridership, while a strong +.79, as not as strong as the relationship of ridership to increases in revenue service hours, +.97[4].

[4] A coefficient of correlation can vary from -1 through 0 to +1. A coefficient of +.97 indicates a strong positive relationship and is quite unusual.

Figure 5 Geography of the Segments



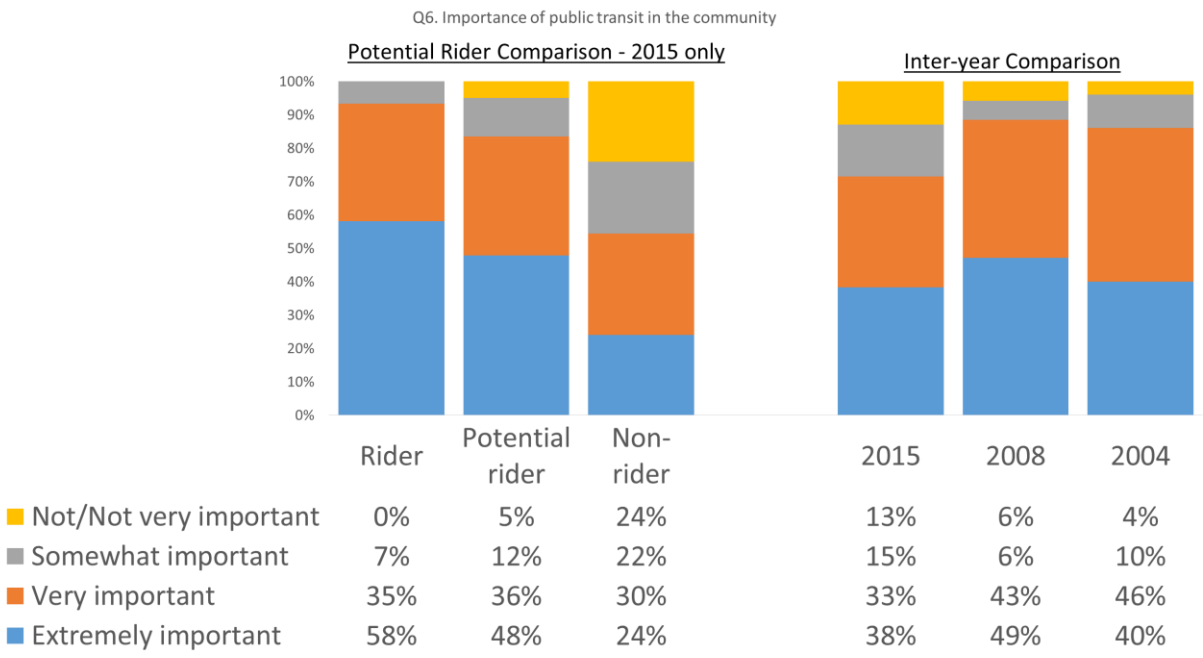
	Olympia	Lacey	Tumwater	Yelm	Other
Rider	14%	15%	13%	12%	11%
Potential rider	43%	35%	46%	32%	42%
Non-rider	44%	50%	41%	56%	47%

Geography of the Segments

The potential to use public transit varies somewhat among the several communities within the PBTA. While Olympia is the largest of the cities, and has a substantial potential rider market, at 43%, Tumwater has a similar percentage, 46%, in the potential segment. Lacey and Yelm each has a potential market of approximately one third (35% in Lacey, 32% in Yelm).

Attitudes toward Public Transit as a Public Service

Figure 6 Importance of public transit



Importance of public transit

Given that public transit systems must be tax-subsidized, it is important for a transit agency to know the extent to which the public – as opposed to only those who regularly use transit – perceives transit to be as a public priority.

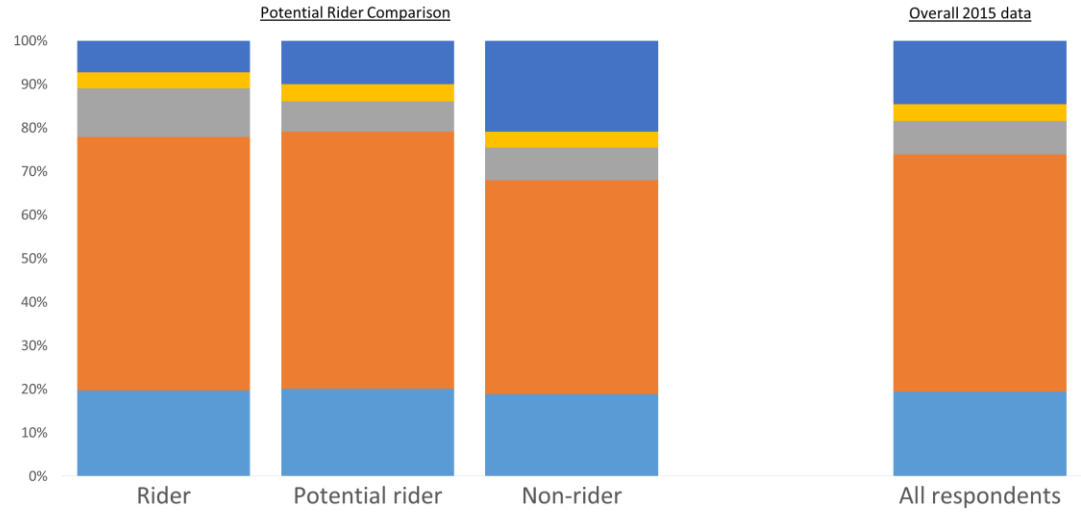
Respondents were asked, *"I would like to ask you various questions about transportation in your community. First, how important is it to have public transportation available in your community? Is it, extremely important, very important, somewhat important, not very important, or not important at all?"*

Throughout the PBTA as a whole, the percent saying it is extremely important to have public transportation rose along with gasoline prices and ridership, from 40% in 2004, to 49% in 2008. With the changing economy, increasing employment, and decreasing gasoline prices, the percentage declined to 38% by 2015. Nevertheless, another 33% said that it was very important for a total of 71% saying it is very or extremely important.

Of greater concern is that the total percent saying it was only somewhat important or not important rose from 12% in 2008 to 28% in 2015. As one would expect, the largest concentration of those not considering public transportation to be especially important is found among the non-rider segment, among whom 22% said it was only somewhat important, and 24% said it was not important or not important at all. Also the current transit riders and potential riders were more likely than the non-riders to say that it is very or extremely important to have public transportation.

Figure 7 Perceived quality of Intercity Transit services

Q32. Overall, how well would you say Intercity Transit is doing in providing these kinds of services?



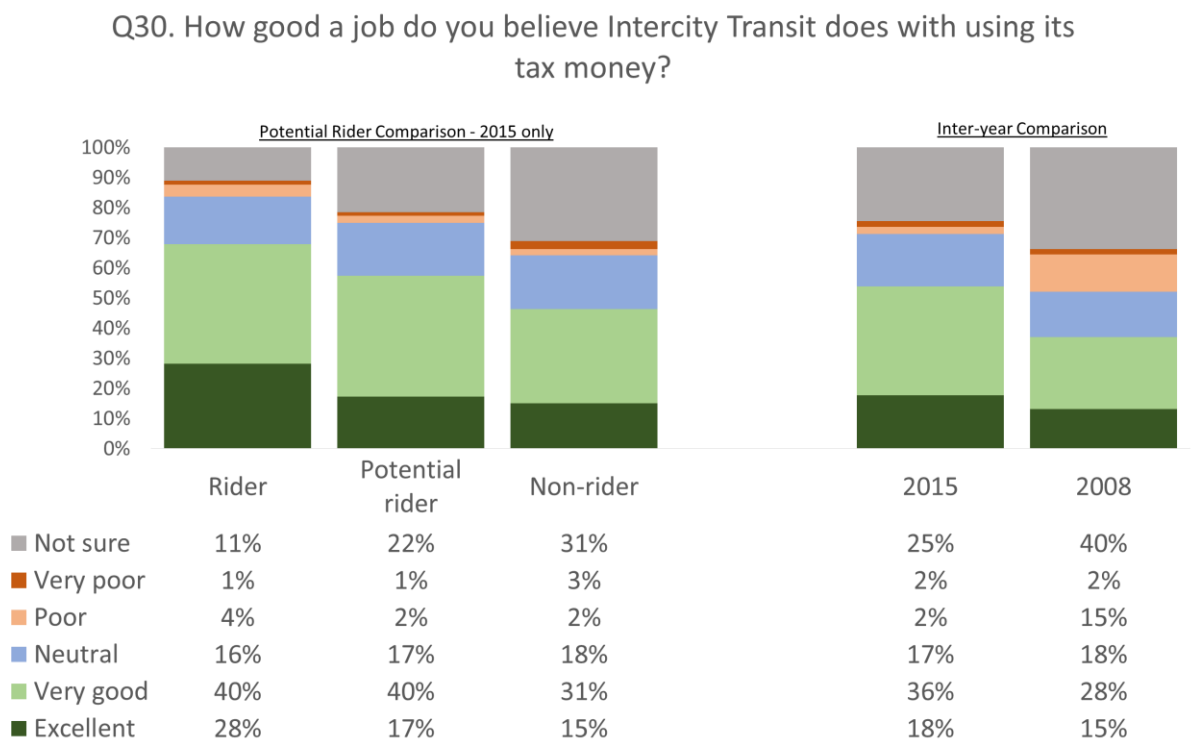
	Rider	Potential rider	Non-rider	All respondents
Not sure	7%	10%	21%	15%
Poorly	4%	4%	4%	4%
Not very well	11%	7%	7%	8%
Very well	58%	59%	49%	54%
Extremely well	20%	20%	19%	19%

Perceived quality of Intercity Transit services

In terms of maintaining the support of the citizenry for public transportation, it is important that the public, whether or not they personally use public transportation, perceive it as being a quality service. Overall, 19% said that Intercity Transit is doing extremely well at providing its services, while another 54% said that it is doing very well. These are very positive scores.

The differences among the segments are as one would expect. They vary mostly in the percent saying not sure, 21% in the case of non-riders, 10% among potential riders, and only 7% among riders.

Figure 8 Use of tax revenue by Intercity Transit



Use of tax revenue by Intercity Transit

One very important aspect of community support for public transportation is the sense that tax money used to support the transportation system is being well used. It should be said, that in the many studies of public attitudes toward the tax financing of public services that CJI Research has conducted, we have observed that the public generally has only the vaguest sense of the actual ways in which tax monies are used. The public tends to respond based on a combination of whether they approve of the particular service being provided, whether they have a very general sense that it functions well, and whether they have become aware of any rumored or alleged negative messages[5].

Between 2008 and 2015 the percent indicating they felt that Intercity Transit was doing an excellent or very good job increased by 11%. The increase came primarily from the percent in 2008 who said they were not sure how to answer. Perhaps there is more comprehensive awareness of the system by that time than there was in 2008.

Not surprisingly, non-riders are more likely than the other segments to indicate that they were not sure how to answer the question (31%), and least likely to say that the use of tax money was excellent or very good (46%). Riders were the most supportive of the transit system in this sense, with 68% indicating they felt that the funds were used in an excellent or very good manner. Potential riders were in the middle on this with 57% saying the handling of funds was excellent or very good[6].

[5] The question asked on this topic in 2004 is not comparable to the 2008 and 2005 question and thus no 2004 results are presented in Figure 8.

[6] Further analysis of this issue in 2015 is presented in Appendix C.

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Figure 9 Variation in sense of importance of transit among served communities

		City of residence					
		Olympia	Lacey	Yelm	Tumwater	Other	Total
Q6. I would like to ask you various questions about transportation in your community. First, how important is it to have public transportation available in your community? Is it...	Extremely important	45%	31%	27%	42%	39%	38%
	Very important	29%	40%	44%	26%	30%	33%
	Somewhat important	15%	15%	16%	19%	11%	15%
	Not very important	4%	6%	0%	6%	7%	5%
	Not important at all	7%	7%	13%	8%	13%	7%
	(VOL) Not sure	1%	1%	0%	0%	0%	1%
Q30. Intercity Transit, receives tax support from local and national sources as well as having revenue from fares. How good a job do you believe Intercity Transit does with using that tax money?	Excellent	17%	17%	21%	20%	13%	18%
	Very good	40%	32%	25%	41%	34%	36%
	Neither good nor poor	16%	20%	19%	15%	18%	17%
	Poor	2%	2%	4%	4%	3%	2%
	Very poor	2%	3%	0%	0%	3%	2%
	(VOL) Not sure	23%	26%	31%	20%	30%	25%

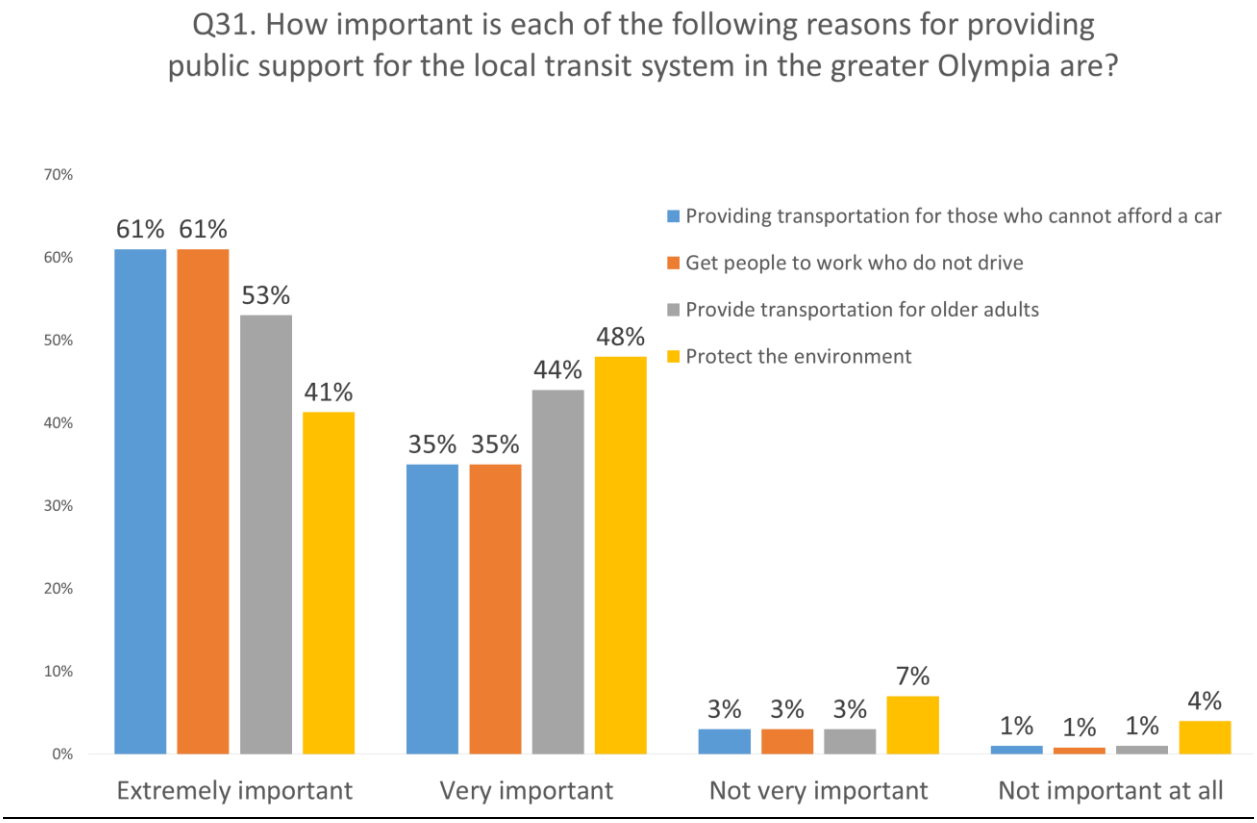
Variation in sense of importance of transit among served communities

Opinions regarding the importance of transit and the handling of tax money to support transit vary somewhat among communities within the PBTA. The variation in the sense of the importance of transit, however, tends to be more between the top two levels of importance, rather than between public transportation being either important or not important. Thus, for example, 45% of respondents in Olympia said it was extremely important, while 29% said it was very important. But in Lacey 31% said it was extremely important, and 40% said it was very important. In short, all of the communities are generally supportive, but the strength of the support varies, and that variation can be quite important.

Those saying that transit is not very important or not important at all, do not differ greatly among the communities. In other words, there appears to be no geographic focal point for opposition to the idea that public transportation is an important component of a community.

There is really very little difference among the communities in rating how well tax money is being used. Across the board the attitude is rather positive but also rather tentative or non-committal. More respondents in each community rate it as very good rather than as excellent. Very few people rate Intercity Transit's handling of revenue as poor.

Figure 10 Reasons to support public transit



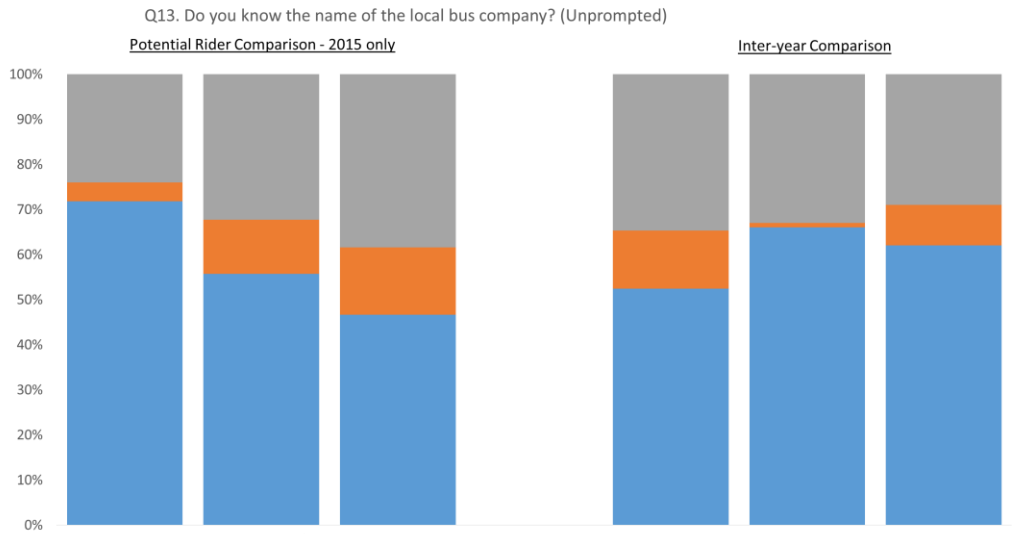
Reasons to support public transit

Respondents were asked how important each of several transit services is as a reason to provide public support for Intercity Transit. The services read to the respondents in the interview are listed in Figure 10 above.

Taking the sample as a whole, we see that 61% expressed the greatest sense of importance for providing transportation for those who cannot afford a car, and for getting people to work who do not drive. A majority, but a lesser majority of 53%, indicated it was extremely important to provide transportation for older adults. This rank ordering of those two priorities is different from what CJI has observed in other communities where most often services to older adults is considered extremely important by more people than service to any other group of the population.

Protecting the environment, while considered extremely important by 41%, and very important by another 48%, is cited as extremely important by fewer than the other reasons for providing transit service. That is, environmental impact is not unimportant to people, but perceived as highly important by fewer people.

Figure 11 Awareness of Intercity Transit



	Rider	Potential rider	Non-rider	2015	2008	2004
Not sure	24%	32%	39%	35%	33%	29%
Other name given	4%	12%	15%	13%	1%	9%
Intercity Transit / 'IT'	72%	56%	47%	53%	66%	62%

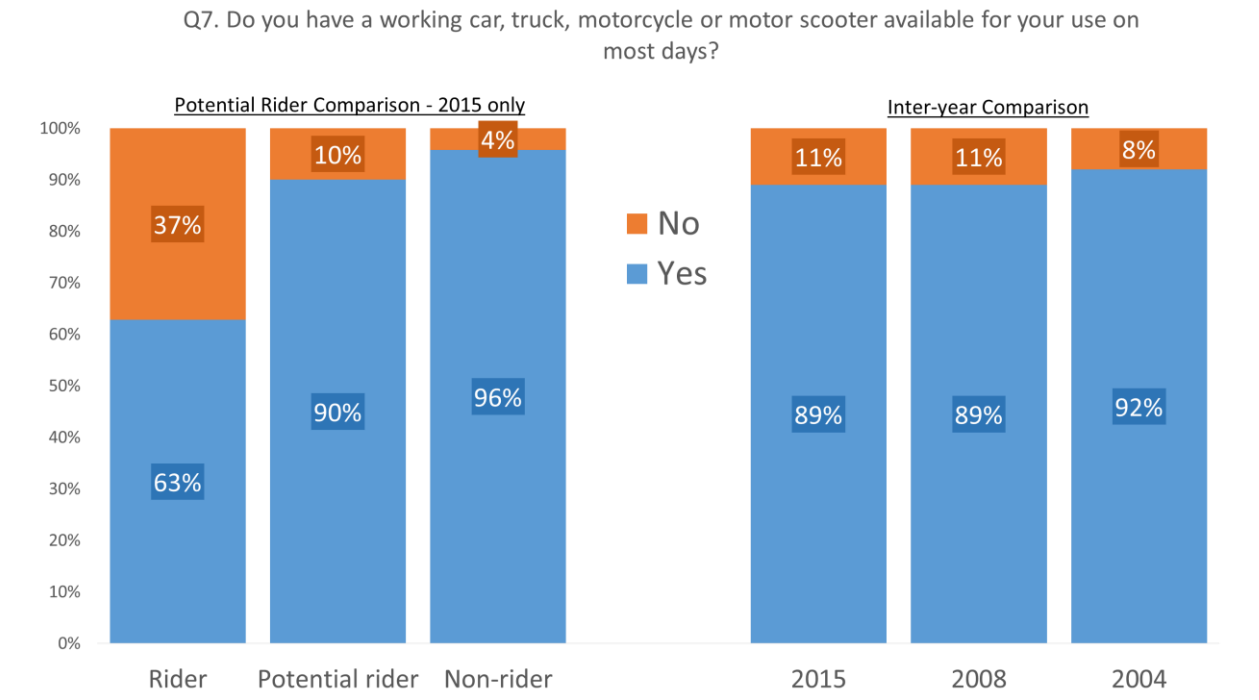
Awareness of Intercity Transit

A fundamental aspect of public support for public transit is simply being aware, on an unprompted basis, of the entity that is supplying local public transit. Intercity Transit is quite well known. Fifty-three percent (53%) were able to name the local bus company without prompting. However, more often (13%) than in previous surveys, respondents gave the name of a different transit system, or a generic name. For example, 3% said Sound Transit, and 1% Pierce Transit. Others mentioned generic names such as, the bus company, or the city.

The market segments differed as expected in terms of knowing the name of the bus system. Oddly, 24% of current transit riders indicated they were not sure of the name of the local transit system, although they had indicated elsewhere in the survey that they use public transit on a regular basis. More than half, 56% of the potential riders, however, were able to name Intercity Transit without prompting, as were almost half, 47%, of the non-riders.

Demographics of the Transit Market Segments

Figure 12 Vehicle Availability



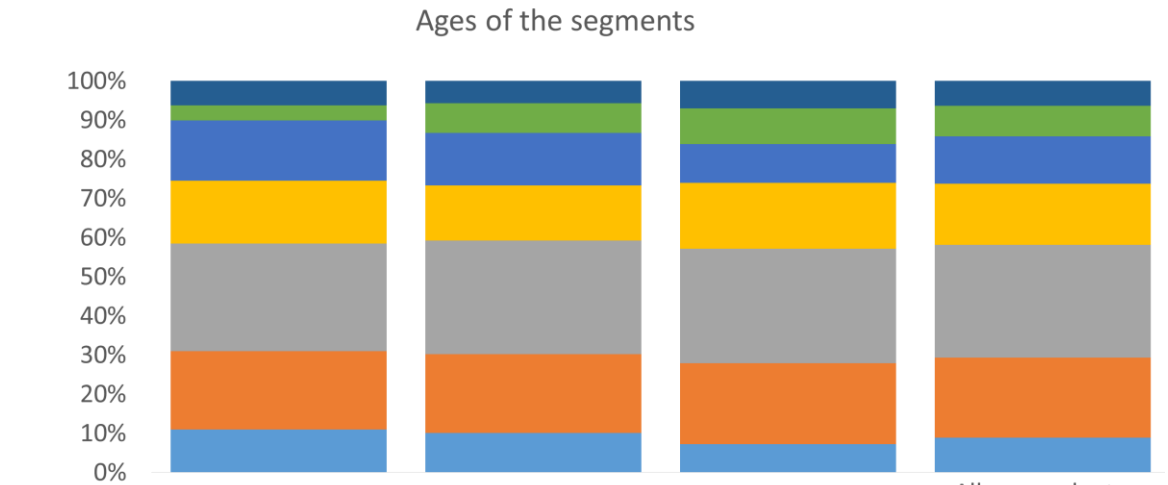
Vehicle availability

Overall, the percent of the area population which regularly has a vehicle available has been very stable since 2004. In both 2015 and in 2008, 89% indicated they have a vehicle available. In 2004 it had been only slightly higher at 92%.

One of the key demographic differentiators among transit users and non-transit users is, of course, the availability of a personal vehicle. Of the transit rider segment, 37% indicated that they do not have a vehicle available to them on most days, but 63% do have such a vehicle. On the other hand, among potential riders, 90% have a vehicle available, but 10% indicated they do not. This is in contrast with the non-riders, among whom only 4% indicated they have no vehicle available.

It is interesting to note that in the companion study of existing Intercity Transit riders (the Customer Satisfaction Survey), 37% said they have no vehicle available. However, the questions were worded somewhat differently in that survey. Existing transit riders (who are known to be transit riders because they were interviewed on the bus) were also asked whether they shared a vehicle, and 44% indicated they do. The balance indicated they have a personal vehicle available to them.

Figure 13 Age



	Rider	Potential rider	Non-rider	All respondents, 2015
75 or older	6%	6%	7%	6%
65-74	4%	8%	9%	8%
55-64	15%	13%	10%	12%
45-54	16%	14%	17%	16%
35-44	27%	29%	29%	29%
25-34	20%	20%	21%	20%
18-24	11%	10%	7%	9%

Age

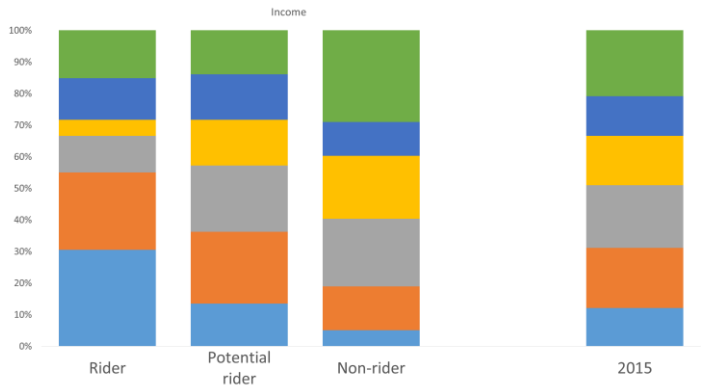
In the United States, the use of public transit tends to be much greater among younger persons than among older persons, although the public stereotypic image of transit users is often the reverse. In the companion Customer Satisfaction study of existing Intercity Transit riders, 46% of the current ridership was 25 years old or younger. Transit users found in the household-based Market Segmentation Survey, however, are no different than the total population or the other transit market segments. How can this occur?

It occurs because the ridership study reflects the transit riders only, and the sampling procedure inevitably captures a profile of those the survey is most likely to find on the bus. They are the more frequent riders, most of whom tend to be quite young. The segmentation survey, being a survey of households, is just as likely to find a septuagenarian rider who may ride once a month to shop, for recreation or a medical appointment as it is to find a young employed college student who uses transit three time a day. Both surveys accurately portray their populations' ages, but they are simply conducted for different purposes.

(See discussion "

Differences between the Customer Satisfaction and Market Segmentation Survey" Page 11.)

Figure 14 Income



	Rider	Potential rider	Non-rider	2015
$100,000 or more	15%	14%	29%	21%
$80,000 to $99,999	13%	14%	11%	13%
$60,000 to $79,999	5%	15%	20%	16%
$40,000 to $59,999	12%	21%	21%	20%
$20,000 to $39,999	24%	23%	14%	19%
Less than $20,000	31%	13%	5%	12%

Figure 15 Income distribution

	Less than $10,000	$10,000 to $19,999	$20,000 to $29,999	$30,000 to $39,999	$40,000 to $49,999	$50,000 to $59,999	$60,000 to $69,999	$70,000 to $79,999	$80,000 to $89,000	$90,000 to $99,999	$100,000 or more
All respondents 2015	5%	7%	9%	10%	10%	9%	7%	8%	7%	5%	21%
Rider	13%	18%	9%	16%	8%	4%	1%	4%	8%	5%	15%
Potential rider	6%	8%	11%	12%	11%	10%	7%	8%	7%	8%	14%
Non-rider	2%	3%	7%	7%	11%	10%	10%	10%	7%	3%	29%

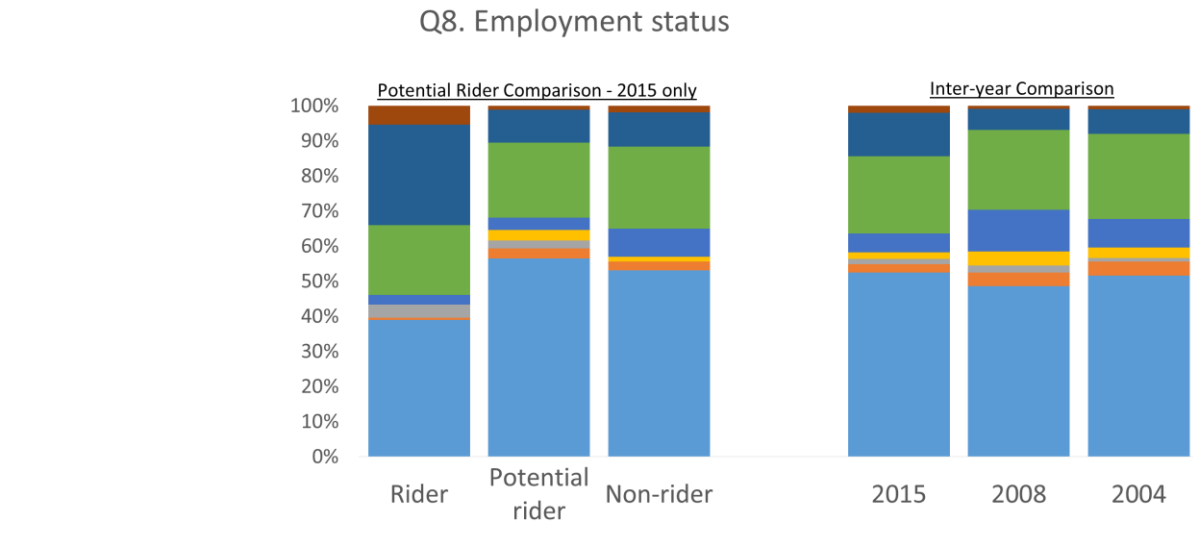
Income

Unlike age, income of the riders is reflected in the segmentation data in a manner similar to that of the passenger survey, though less pronounced. That is, riders strongly tend to be of lower household incomes than the general PBTA population, but (for the same reason as the age differences) not as much so as shown in the passenger survey. While 31% of the riders in the segmentation survey report household incomes of less than $20,000, only 5% of the non-riders segment report incomes that low.

Potential riders, the primary marketing target, have incomes between the levels of the riders and the non-riders. A total of 26% of potential riders report household incomes of less than $40,000, which, depending on household size can be quite adequate or seriously deficient, but either way, is not luxurious. This is the primary marketing target.

Another way to visualize the income distribution is shown in Figure 15. That figure shows the contrast between the overall income distribution of the entire population of the PBTA (yellow area chart format) and the three transit market segments (shown as vertical bars). Notice that the bar heights and associated percentages of the riders and potential riders are greater than those of the riders at the left of the distribution (low income) and lower at the right (higher income). A key target market would be those potential riders earning $40,000 or less in the household because they are demonstrably similar to the existing ridership that finds Intercity Transit useful.

Figure 16 Employment status



	Rider	Potential rider	Non-rider	2015	2008	2004
Other	5%	1%	2%	2%	1%	1%
Unemployed	29%	9%	10%	12%	6%	7%
Retired	20%	21%	23%	22%	23%	24%
Homemaker	3%	4%	8%	5%	12%	8%
Work from home	0%	3%	1%	2%	4%	3%
Student only	4%	2%	0%	1%	2%	1%
Employed student	1%	3%	2%	2%	4%	4%
Employed outside your home	39%	56%	53%	52%	49%	51%

Employment status

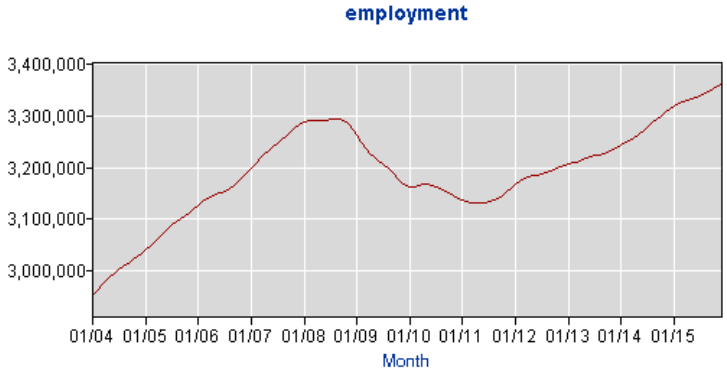
The employment levels of the total sample have reflected the ups and downs of the economy since 2004. At the time of the survey in 2008, key sectors of the economy were beginning to experience an expanding crisis, but the full effects on employment had not yet been felt. As a result, the basic employment figure in the 2008 survey (49%) was only slightly lower than in 2004 (51%). In 2015, six years later, it had increased slightly with the economic recovery to 52%. In the interim it probably sunk lower.

The potential riders are somewhat more likely than others to be employed outside the home (62%). Yet, as we have seen, many people in the potential rider segment are of rather low income households, meaning that costs of transportation for commuting are likely to present a challenge for them. The second largest group within the potential rider segment is comprised of retired persons (19%). Potential riders are not unique in this respect, however, for the current riders and non-riders have similar percentages of retirees (20% and 18%, respectively).

The current riders include three substantial employment groups: People employed outside the home (48%), retirees (20%), and unemployed persons (21%). A small proportion of adults (persons 18 or older) who use Intercity Transit with some minimal regularity are students (1%) or students who are employed (2%) or homemakers (2%). The reader should bear in mind that this view of riders is a snapshot of the 14% of households with a regular adult rider, not a profile of the Intercity Transit ridership one sees using the buses. In the onboard passenger survey, 37% reported that they were employed outside the home while another 36% are students, 13% are unemployed, and 7% are retired,

with the balance being homemakers or persons employed at home. In other words, the 14% of community adults that use the Intercity Transit buses, use them with greatly varied frequency levels. Thus, to take an example, a small percent of the population 18 or older who are students (3%) can account for 36% of the ridership in any given time period.

Figure 17 Employment, State of Washington, 2005 to 2015

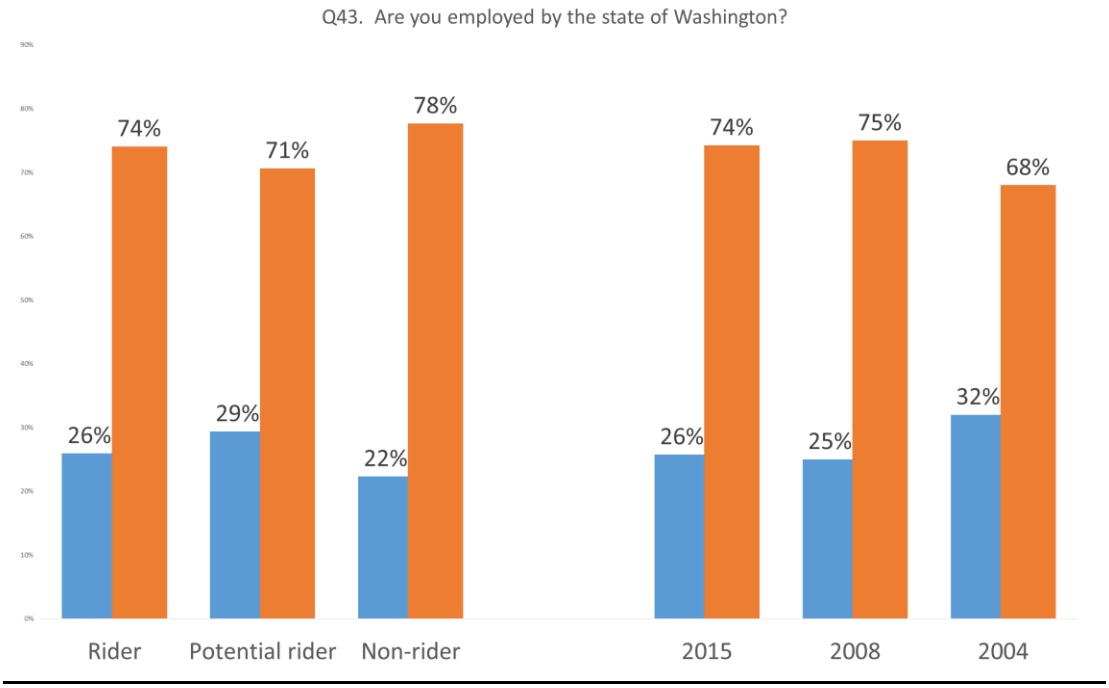


Employment and unemployment, State of Washington, 2005 to 2015

Context helps with understanding of time-series surveys. The United States Department of Labor, Bureau of Labor Statistics, publishes state by state rates of employment and unemployment. Figure 17 displays the impact of the Great Recession on employment in Washington during the intervening years between the surveys of 2004, 2008, and 2015. It is a history of employment peaking in 2008, rapidly falling just after the 2008 survey, and returning to levels above those of 2008 by the time of the 2015 survey. The fact that the each of the three surveys occurred during periods of high employment, and that Great Recession occurred in the intervening years between 2008 and 2015 undoubtedly had an impact on the stability of the percentages of the three surveys reporting being employed. It is, however, interesting that in 2015, that a substantial number of people (12%) continue to report that they are unemployed, especially among the rider segment (29%)[7].

[7] The recovery has not been uniform among income classes. Also, rising employment can have the paradoxical effect of increasing the population seeking work and describing themselves as unemployed when they do not find jobs.

Figure 18 State employees



State employees

Employees of the state of Washington comprise a significant portion of the total area population, not a surprising fact for a capital city. In 2004, they comprised almost one third of the adult population, while in 2008 in 2015 that percentage had shrunk somewhat to 25%, a decrease of seven percentage points which is a decrease of 22% from the base of 32%. At 26%, it essentially remained at the 2008 level in 2015.

The transit market segments differ somewhat with respect to state employment. The non-riders are least likely to be state employees (22%) while the potential riders are somewhat more likely (29%) than the current riders (26%) to be state employees.

Is the decrease from 2004 to 2008 consistent with the actual employment records? According to the United States Census Bureau, Government & Payroll surveys[8], the State of Washington had:

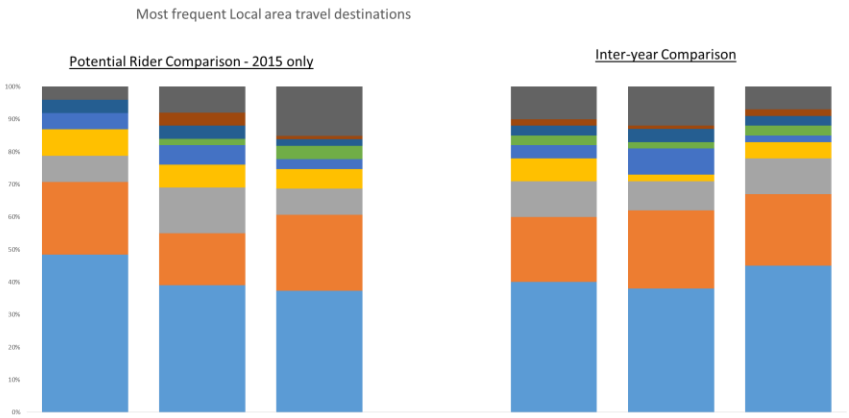
- 145,840 employees in 2004
- 102,788 employees in 2008, a decrease of 30% from 2004.
- 99,079 employees in 2014 (The most recent data available. Only minor change from 2008.)

Of course, the state level figures include the entire state and not just the capitol. However, the pattern is certainly consistent with the decrease described in the survey data.

[8] http://www.census.gov//govs/apes/historical_data_2004.html

Local Travel Patterns

Figure 19 Local Travel Destinations (including both commuting and other purposes)



	Rider	Potential rider	Non-rider	2015	2008	2004
Other	4%	8%	15%	10%	12%	7%
Lakewood	0%	4%	1%	2%	1%	2%
Lewis/Mason/Greys Harbor counties	4%	4%	2%	3%	4%	3%
Yelm	0%	2%	4%	3%	2%	3%
Seattle or north of King Co	5%	6%	3%	4%	8%	2%
Tacoma	8%	7%	6%	7%	2%	5%
Tumwater	8%	14%	8%	11%	9%	11%
Lacey	22%	16%	23%	20%	24%	22%
Olympia	48%	39%	37%	40%	38%	45%

Local Travel Destinations (including both commuting and other purposes)

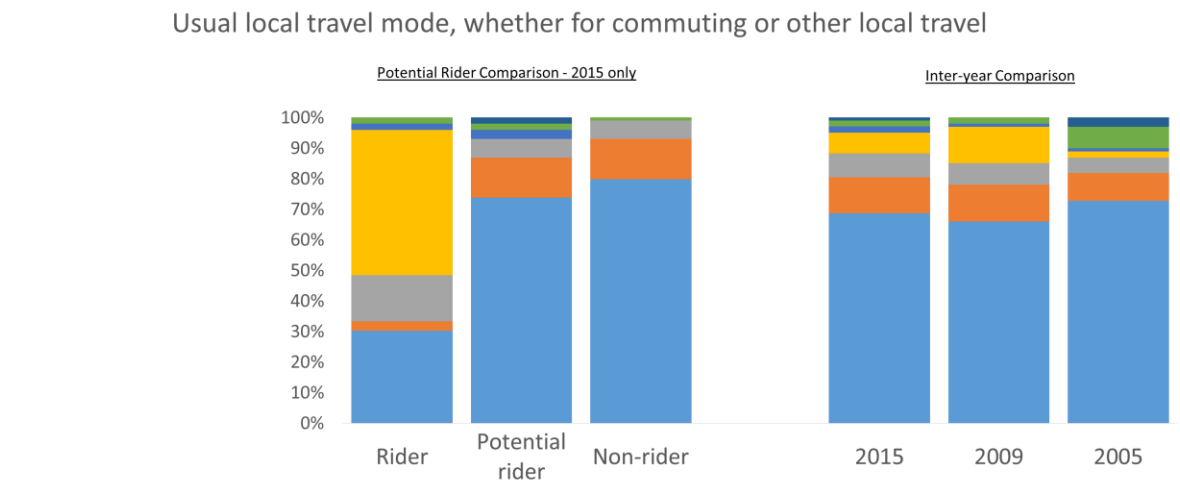
Riders were asked questions about their most frequent local trips. If they were employed outside the home or were students, it was assumed that the most frequent trip was a commuting trip and they were asked the location within or outside of Thurston County to which they commute. If they were not employed or students they were asked simply, "Thinking about the local trip to take more often than any other local trip, is your destination in one of the following?" A list of local cities and counties was read to them by the interviewer. It included all of the destinations shown in the chart above.

As in previous years, Olympia is the destination for more trips than any other location (40%), with Lacey mentioned second most frequently (20%), and Tumwater third (11%). While there were minor differences in the other locations, such as Tacoma and Seattle and areas north of King County, the differences are too small to be meaningful. In short, the basic travel patterns have changed very little since 2004.

There are, however, some differences among the transit market segments. Current riders, presumably because of the centrality of Olympia in the Intercity Transit route system, are considerably more likely (48%) than potential riders (39%) or non-riders (37%) to say that their local trips are within Olympia.

Among potential riders, a total of 21% indicated that their usual destination was outside of Thurston County. This does not include the 8% who cited other locations than those on the list. While those "other" locations were not recorded as part of the interview, it is likely that they involve a mixture of destinations within the unincorporated areas of Thurston County and areas outside of Thurston County.

Figure 20 Usual mode for local travel (including both commuting and other purposes)



	Rider	Potential rider	Non-rider	2015	2009	2005
Vanpool	0%	2%	0%	1%	0%	3%
Walk / skateboard	2%	2%	1%	2%	2%	7%
Bicycle	2%	3%	0%	2%	1%	1%
Bus	47%	0%	0%	7%	12%	2%
Get a ride with others / carpool	15%	6%	6%	8%	7%	5%
Drive, taking other adults along	3%	13%	13%	12%	12%	9%
Drive alone	30%	73%	79%	70%	66%	72%

Usual mode for local travel (including both commuting and other purposes)

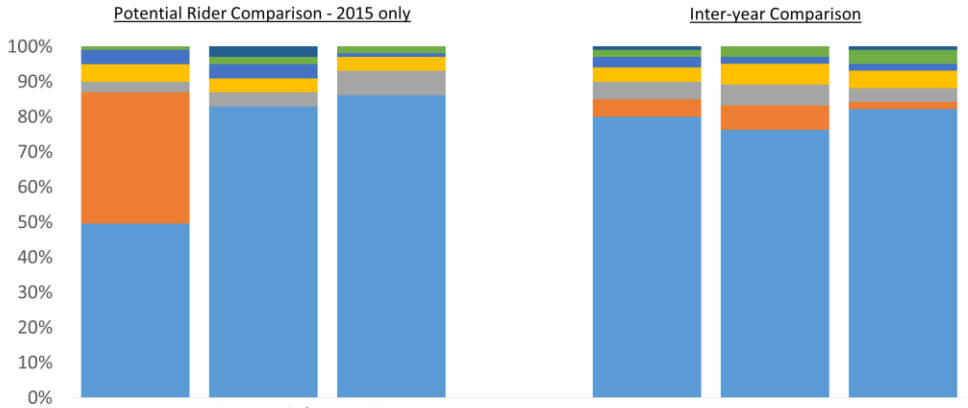
Respondents were asked their usual mode for local travel. There have been small but meaningful differences between 2004, 2008, and 2015 surveys. In 2004, 72% indicated that they drive alone for their local trips, and only 5% indicated that they ride with others or carpool. In 2008, at the peak of high-priced gasoline, the percent indicating they drove alone had declined to 66%, while the percent indicating they took the bus had increased from 2% to 12%. By 2015, with the improving economy, and declining gasoline prices, the percent using the bus for most local travel had declined, but only to 7%, not to the 2% level of 2004. This is consistent with the patterns seen in Figure 4, page 16.

As one would expect, the percent saying they usually drive alone on their local trips is highest among the non-riders 79%. It is somewhat lower among the potential riders, 73%, and lowest among current riders, 30%. Correspondingly, those who are classified as riders are quite likely (47%) to say they usually take the bus. They are also more likely to say they get a ride with others or carpool (18%). In short, riders are more likely than the other segments to already use alternative forms of transportation including modes other than the bus.

Also, potential riders are somewhat more likely than non-riders to say they currently most often walk or bicycle to their usual destinations.

Figure 21 How people commute to work or school

Q10. Employed persons and students only: How do you commute to work or school?



	Rider	Potential rider	Non-rider	2015	2008	2004
Vanpool	0%	3%	0%	1%	0%	1%
Walk / skateboard	1%	2%	2%	2%	3%	4%
Bicycle	4%	4%	1%	3%	2%	2%
Ride with others/carpool	5%	4%	4%	4%	6%	5%
Drive with others	3%	4%	7%	5%	6%	4%
Bus / 'IT'	37%	0%	0%	5%	7%	2%
Drive alone	49%	82%	87%	80%	77%	83%

Commuting: How people commute to work or school

When the sample is restricted to commuters only (Figure 21 above), the percentages using the various modes are somewhat different than in the total population, commuting and non-commuting, shown in the chart on the previous page (Figure 20).

In the commuting population in 2004, 83% indicated that they commuted by driving alone, and only 2% indicated they most frequently took the bus. As gasoline prices increased, the percent saying they usually take the bus rose from 2% to 7%. By 2015 that percentage had declined somewhat to 5%. The pattern is the same for all respondents, but the specific percentages differ.

Of riders who commute, almost half (49%) say they usually drive alone to work or school. However, a substantial proportion, 37%, say they take the bus. Most potential riders and non-riders drive alone (82% and 87%, respectively).

Figure 22 Variations in occasional mode of SOV commuters

		Commuter transit ridership segment					
		Rider	Potential rider	Non-rider	2015	2008	2004
Q11. Do you always drive, or do you sometimes use another mode such as the bus, a carpool, bike or walk?	Take the bus	25%	10%	2%	7%	0%	3%
	Intercity Transit	0%	1%	0%	0%	na	na
	Carpool	5%	11%	7%	9%	3%	6%
	Vanpool	0%	0%	0%	0%	na	na
	Walk	8%	5%	4%	5%	0%	2%
	Bicycle	24%	8%	2%	6%	1%	5%
	Always drive alone	39%	65%	84%	73%	73%	66%

Variations in occasional mode of SOV commuters

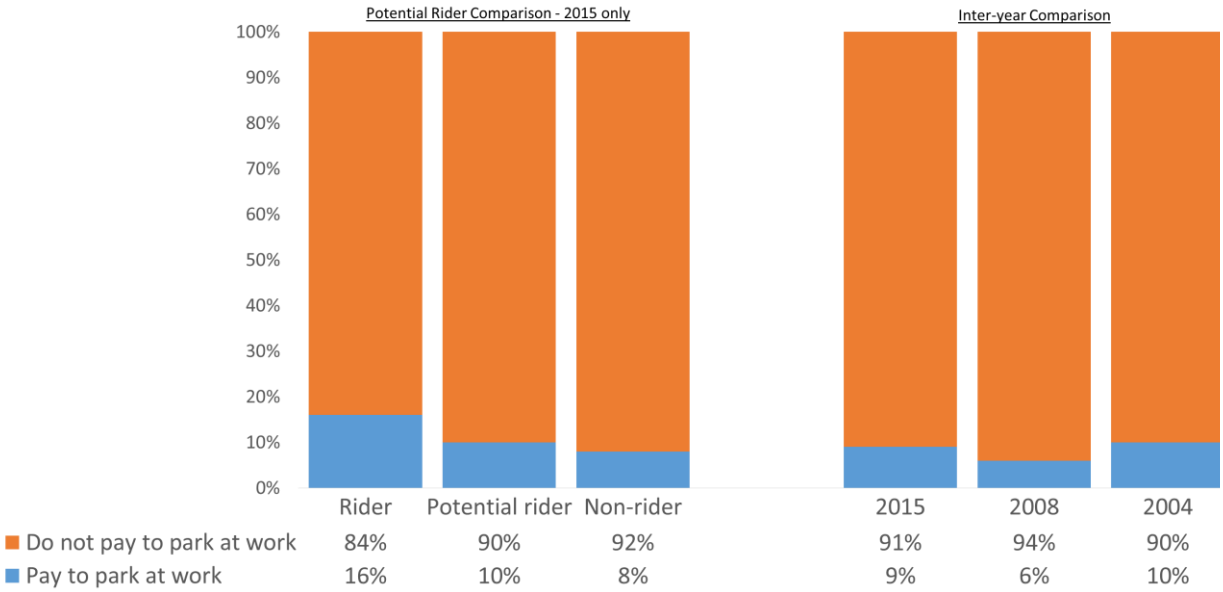
Those who said they most often commute by driving alone (80% of the commuter sub-sample, or 49% of the total sample), were asked whether they always drove or whether they sometimes used another mode. In 2015, almost three fourths (73%) said that they always drove alone, but 7% said that sometimes they take the bus.

The table shows the breakdown by transit market segment of the commuters who said they always drive when they commute. As one would assume, it was the current riders who are most likely (25%) to say that they sometimes take the bus although they normally drive alone.

Of the potential riders who are SOV commuters, 65% said that they always drive alone, which means that 35% use some other mode on occasion. This includes 11% of the potential riders who said they sometimes would take the bus. This is an indication that, at least some of this segment has experience using bus service locally. Others also use alternatives to the SOV, including 11% who carpool, 8% who bicycle and 5% who occasionally walk. Apparently then, roughly one third of the potential rider segment has demonstrated a willingness to use alternatives.

Figure 23 Having to pay for parking

Q14. When and if you drive to work, do you have to pay for parking?

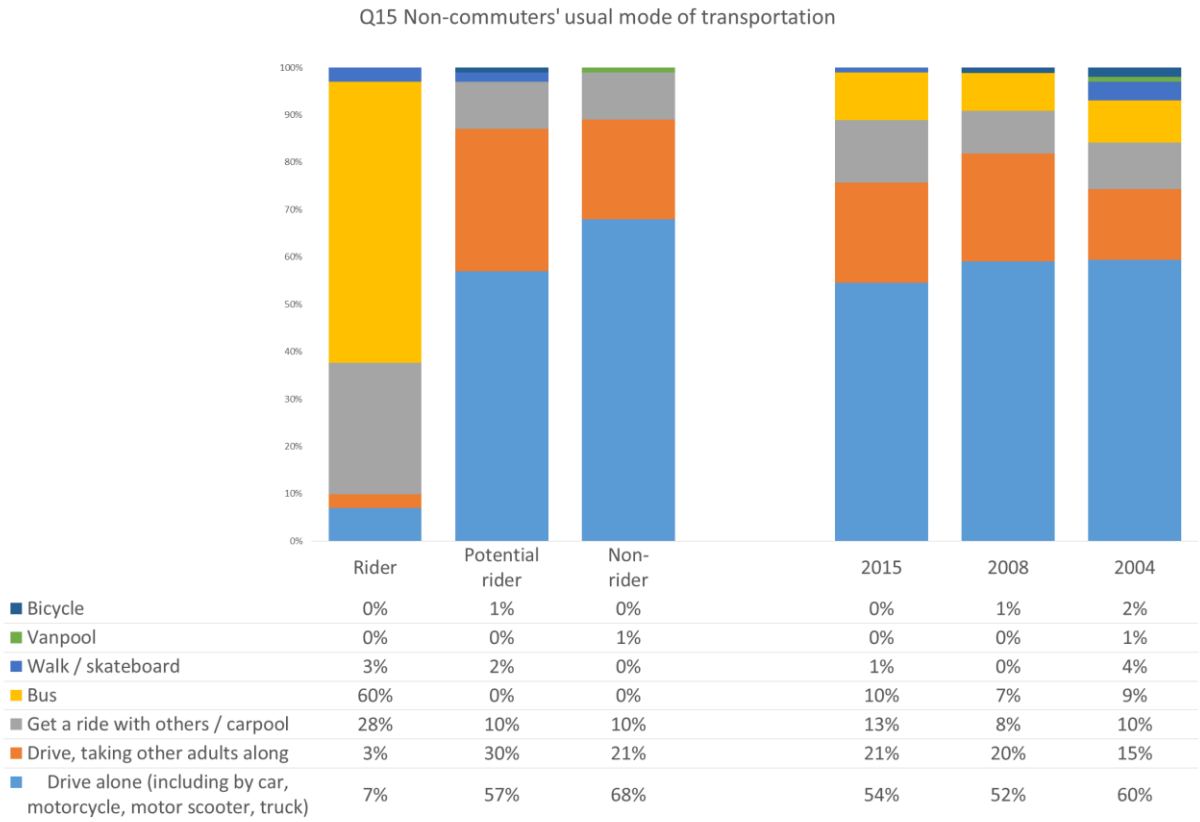


Having to pay for parking

Those who drive to work, regularly or occasionally (including both those who drive alone and those who carry others with them), were asked whether they had to pay for parking. The percent saying they have to pay for parking has varied over the course of three surveys within only the small range of 6% to 10%. It currently stands at 9%. In short, 91% of the commuting public who drive to work park at no charge.

It is interesting to note that having to pay for parking is apparently an incentive to use Intercity Transit. While 16% of the riders say they must pay to park when they drive to work, only half that many, 8%, of the non-riders say they must pay. As one might anticipate, potential riders are in the middle on this, with 10% indicating they must pay to park when they drive.

Figure 24 Non-commuter usual transportation



Non-commuter usual transportation

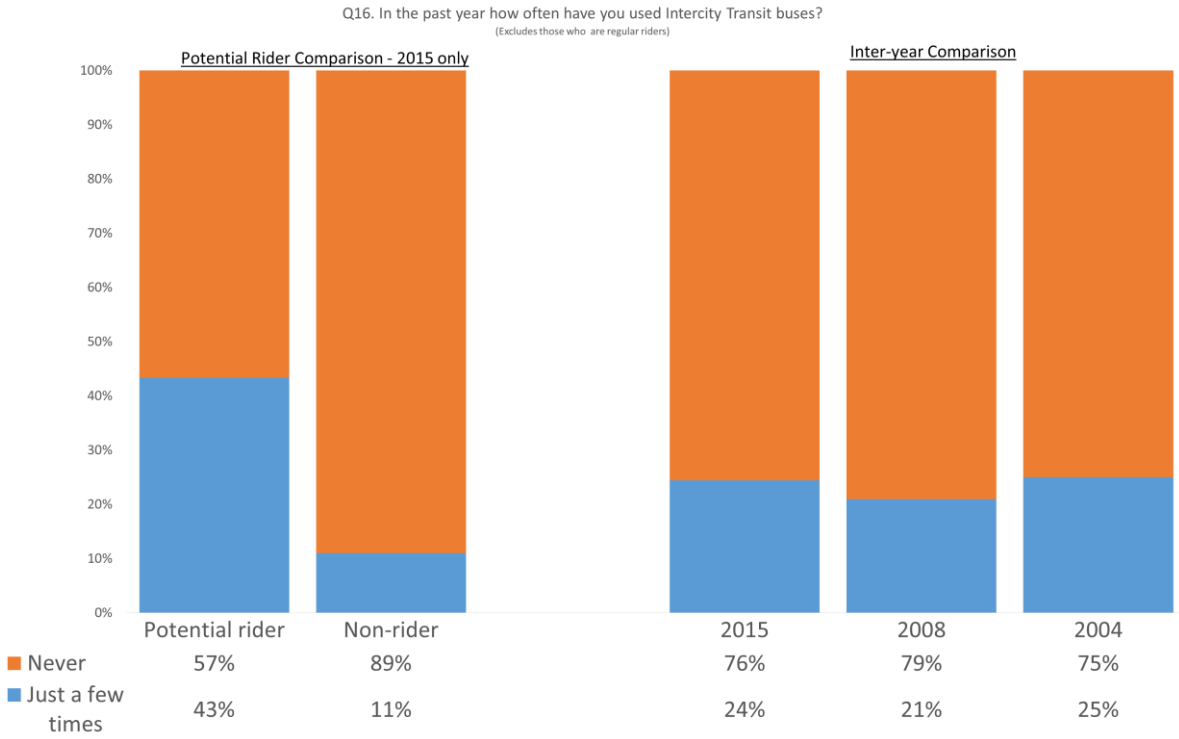
For those who do not have a reason to commute, which is to say those who are retired, homemakers, or unemployed persons, the tendency is for most people to drive alone. This is very similar to the pattern for commuters, although the tendency to drive alone is not nearly as pronounced for the non-commuter.

In 2015, 54% of the non-commuters indicated they always drive alone when making their local trips. This is very similar to the 52% observed in 2008. There have been some differences over time, however, especially in the percentage indicating that they share rides with others or carpool. In 2004, a total of 25% said that for local trips they drove with, or got a ride from, others. That rose slightly in 2008 to 28%, and rose again until by 2015 it stood at 34%. Perhaps the "sharing economy" is catching on among them.

The percent taking the bus for local errands and other local trips has remained fairly constant, changing in minor, inconsistent, and statistically insignificant ways from 9% in 2004 to 7% in 2008 to 10% in 2015.

Most riders (60%) say they most often use Intercity Transit for their local trips. However, 28% of the riders say they most often get a ride with others. (Although they are "riders" because they use the bus often enough to be so-designated, they do not *most often* take the bus for their local trips). Potential riders tend (57%) to drive alone, but another 30% take others along. Non-riders (68%) drive alone, while 21% take others along. Thus considerable ride-sharing is occurring, especially among riders and potential riders.

Figure 25 Intercity Transit use by those who do not use transit regularly



Intercity Transit use by those who do not use transit regularly

Potential riders and non-riders (i.e., those who do not use Intercity Transit on a regular basis), were asked whether, during the past year, they had used Intercity Transit buses if at all. The percent who had used Intercity Transit in the past year were very consistent in the three surveys, varying only within the narrow range of 21% to 25%. Currently, in the 2015 survey, 24% indicated that they had used Intercity Transit in the previous year.

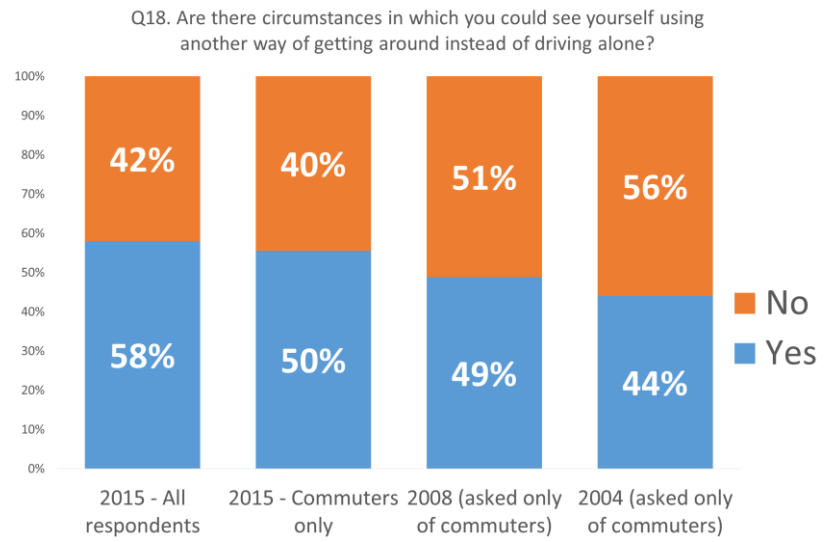
The tendency to use Intercity Transit varies considerably between the potential riders in the non-riders. While 89% of the non-riders said they had never used Intercity Transit in the previous year, and 11% had done so, 43% of the potential riders said that they had used Intercity Transit, and 57% said that they had never used it[9].

To repeat a point made earlier in this report, the fact that so many potential riders have experience using Intercity Transit suggests that they have passed an initial barrier of uncertainty about how to use the system, and that the marketing challenge is to encourage them to use it more frequently. This may be a matter of levels and types of services as well as a matter of providing further marketing information.

[9] Note that the options in this case are never or just a few times. The reason for this unusual dichotomy is that if respondents said they used Intercity Transit regularly, that response would have classified them as riders, and they would not have been asked this question. Thus the option "just a few times."

Alternate transportation

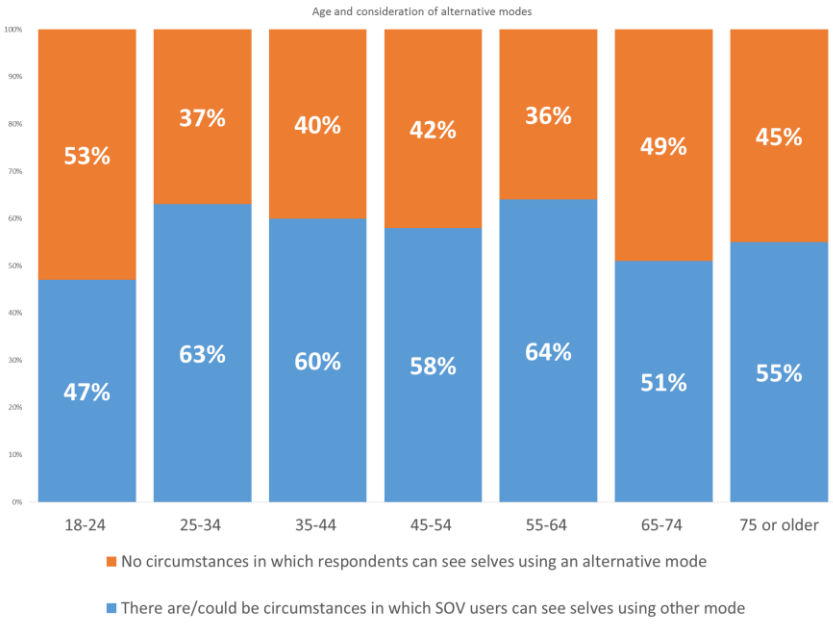
Figure 26 Alternate transportation



One of the keys to the transition between traveling via single occupancy vehicle and traveling via public transit or other alternative forms of local transportation is psycho-cultural. For people accustomed to the sense of independence provided by the SOV, to make the transition to use of alternative forms of transportation in which they are somewhat dependent on others, requires a significant psychological shift, and one that is very constrained by our national culture of personal independence embodied in the automobile culture.

Thus, to be able to make that shift, people need to begin by being able to envision themselves doing so. For this reason SOV travelers were asked the following question, *"Are there circumstances in which you can see yourself using another way of getting around instead of driving alone?"* This is a very crude indicator, but it does begin sort out those who have some potential to become users of alternative modes, and those who do not.

Figure 27 Age and interest in alternative modes

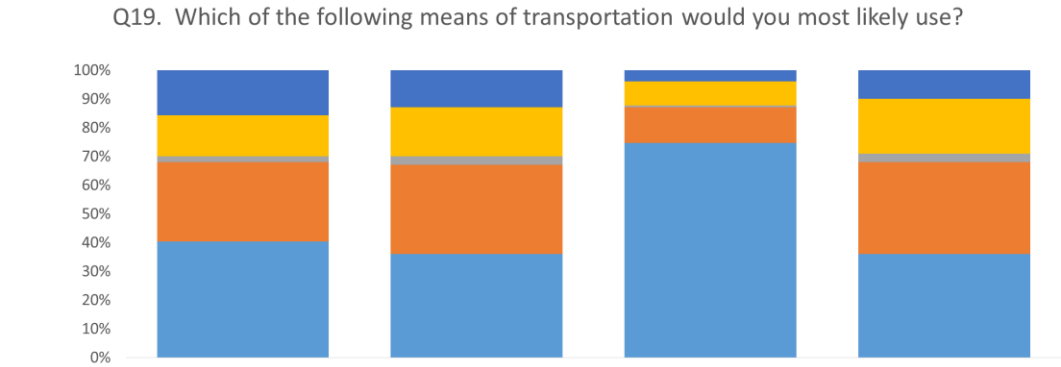


In 2004, and in 2008 this question was asked of only those SOV drivers who were employed outside the home or students, and therefore had to commute. In 2015 it was asked of all SOV drivers, whether commuters or not. For comparison purposes, therefore, in Figure 26 we break the respondents who are commuters out for separate comparison. In 2004, 44% indicated they could envision themselves using an alternate form, but that had grown to 49% in 2008 and remained at about that level (50%) in 2015. Apparently, then, about half of the current adult public who drive alone to work or school are at least willing to consider an alternate form.

The popular press has suggested that the millennial generation is much more oriented to using alternate modes of transportation than are the older generations. While this may or may not be true nationally,

there is no evidence of it in the Intercity Transit segmentation study. At least on this initial gross measure, there is no statistically significant relationship at all between age and the tendency for respondents to say that they are willing to consider an alternative. As Figure 27 indicates, interest is lowest among the 18-24 year olds, and is rather flat in the 60% range in all of the age groups from 25 to 64, falling below that only in the drivers over the age of 65.

Figure 28 Alternate transportation mode



	2015 - All respondents	2015 - Commuters only	2008 (Asked of commuters only)	2004 (Asked of commuters only)
Walk	16%	13%	4%	10%
Bike	14%	17%	8%	19%
Vanpool	2%	3%	1%	3%
Carpool	28%	31%	12%	32%
The bus	41%	36%	75%	36%

Alternate transportation: mode

Those who indicated that they were able to conceive of themselves using an alternate form of transportation were asked what mode they would most likely use if they were to use an alternative. Attitudes like this are, of course strongly affected by economic realities. Between 2004 and 2008 the percent of the public indicating that if they were to use an alternate form of transportation they would use the bus more than doubled from 36% in 2004 to 75% in 2008. Why would such a major change occur?

In 2008 the survey was conducted at the initial peak of a long-term increase in the price of gasoline prior to its sudden and rapid decline during the onset of the Great Recession (See Figure 4, page 16). This also came at the end of a lengthy period of expansion of Intercity Transit service. Thus, service levels, gasoline prices, and ridership all hit a peak in 2008. At the same time, nationally, there was a great deal of media talk about increasing use of public transit as a result of the long increase in gasoline prices. For all these reasons, although the virtual doubling of the choice of the bus as an alternate does seem extraordinary, it does accord with common observation.

By 2015, with gasoline prices much lower, the percent of SOV commuters willing to consider an alternative who said they would take the bus had declined dramatically, returning to the level of 2004, 36%, while the percent saying they might carpool had doubled to 24%.

Interestingly, the percent indicating they would bicycle or walk also declined substantially from 2004 to 2008 and rose again in 2015. A possible explanation is that many of those who might have said in 2004 they would walk or bicycle were saying in 2008 that they would likely take the bus. That would have the effect of diminishing the percentage of commuters who claim they would walk or bicycle. It seems doubtful, after all, that housing patterns would have changed dramatically enough to account for an increase from 12% to 28% of people indicating that they would travel under their own power by bicycle or walking.

Figure 29 Familiarity with services

Familiarity with various Intercity Transit services							
		Rider	Potential rider	Non-rider	2015	2008	2004
Q22. Were you familiar with the service between Olympia, Lacey, Tumwater, and Yelm, or had you only heard of it, or were you not aware of it at all?	Familiar	80%	76%	68%	73%	71%	69%
	Had only heard of it	9%	18%	19%	17%	17%	23%
	No, was not aware	9%	6%	11%	9%	12%	7%
	Not sure	2%	0%	2%	1%	0%	1%
Q23. Were you familiar with the service from the Olympia area that goes into Tacoma and Lakewood in Pierce County, making it possible to connect ith Pierce and Sound Transits, or had you only heard of it, or were you not aware of it at all?	Familiar	77%	61%	51%	58%	55%	46%
	Had only heard of it	11%	24%	25%	23%	20%	31%
	No, was not aware	12%	15%	22%	18%	24%	24%
	Not sure	0%	0%	2%	1%	0%	0%
Q24. Have you heard of a local transportation service called Dial-a-Lift service that provides door-to-door transportation for qualified seniors and persons with disabilities who cannot take the regular buses, or had you only heard of it, or were you not aware of it at all?	Familiar*	63%	66%	58%	62%	87%	89%
	Had only heard of it	23%	21%	24%	23%		
	No, was not aware	13%	13%	17%	15%	11%	10%
	Not sure	1%	0%	0%	0%	2%	1%
Q25. Were you previously aware that Intercity Transit provides a van to groups of five to twelve commuters who drive it themselves and are responsible for the cost of operating it, or had you only heard of it, or were you not aware of it at all?	Familiar*	50%	43%	42%	43%	58%	45%
	Had only heard of it	27%	23%	24%	24%		
	No, was not aware	22%	33%	34%	32%	41%	54%
	Not sure	0%	1%	1%	1%	1%	1%

* The response options for this item in 2004 and 2008 were "Yes/No/Not sure" and did not include "Just heard of it."

Familiarity with services

One of the obvious keys to marketing public transit, is making people familiar with services available. Figure 29 details responses to four questions about awareness of specific Intercity Transit services. The most basic of these services is service among Olympia, Lacey, Tumwater, and Yelm. In each survey, the vast majority of the public was familiar with these services. In the earliest survey in 2004, 69% were aware, and that had grown to 73% by 2015. Riders and potential riders are more likely to be aware than the non-riders of these services. But even among the non-riders, more than two thirds, 68%, were aware.

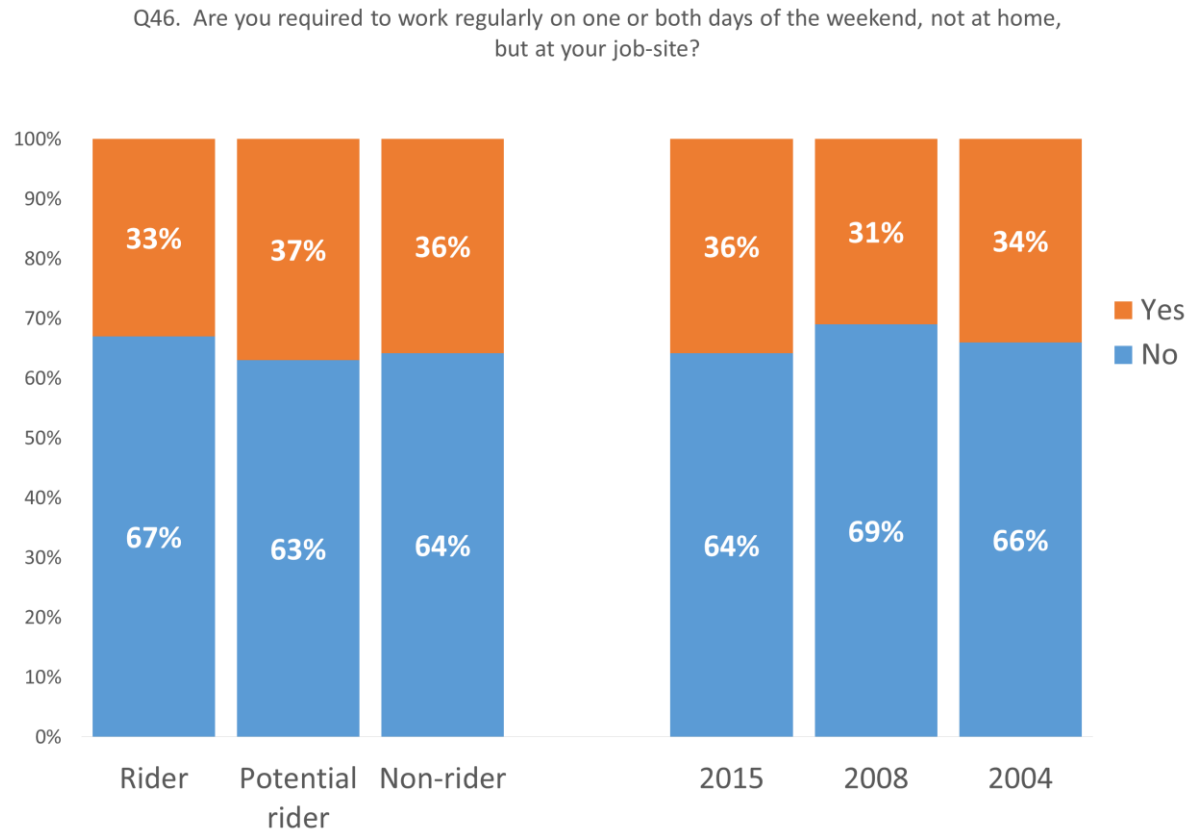
A service that is somewhat less well-known, is service from Olympia to Tacoma and Lakewood in Pierce County such that a rider can connect with Pierce Transit and Sound Transit. By 2015, 58% were aware of the service, this was especially true, of course, among the rider segment, but even among the non-riders more than half, 51%, said they were familiar with it.

Two other aspects of service, demand response, and vanpooling, were asked in a slightly different way in the earlier surveys than they were in 2015. For this reason although the percent indicating familiarity appears to have changed it really has not. In 2015, 62% said they were very familiar with the Dial-A-Lift service and another 23% indicated they had heard of it, for a total of 85% indicating some level of awareness. This corresponds to similar percentages in the earlier surveys.

In 2015, 43% said they were familiar with vanpooling as a service of Intercity Transit, and another 24% said they had heard of it. Thus a total of 67% are aware of the vanpooling program. It is interesting to note that there has been steady growth in awareness of this aspect of service, from only 45% in 2004 to 58% in 2008, to 67% in 2015.

Special Challenges to Using Transit

Figure 30 Working on the weekend

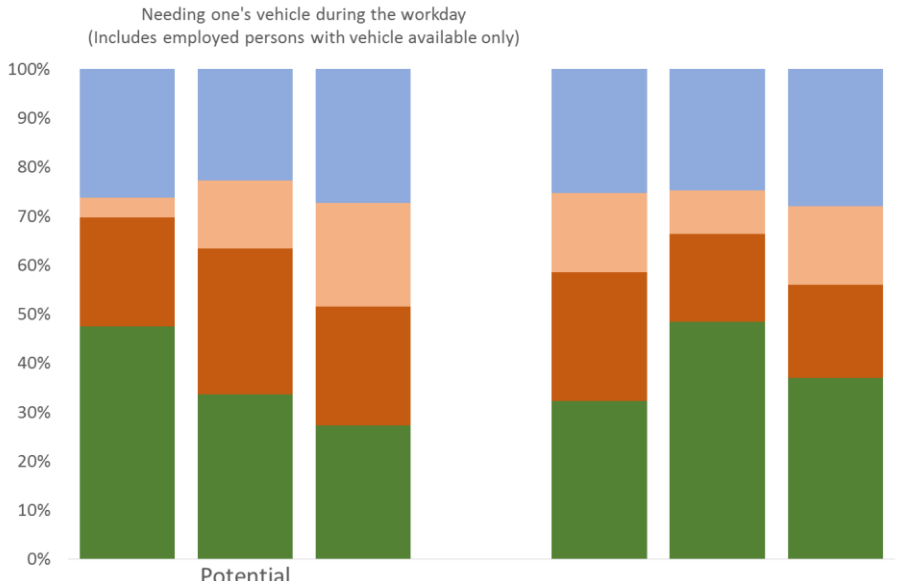


Working on the weekend

Although many people are potential users of transit in terms of their interest in alternative modes and willingness to consider them, structural obstacles can interfere with good intentions. Transit service invariably operates at reduced level on weekends, with the result that those employed persons who must work on the weekend generally have a reduced propensity to use public transportation.

Approximately one third of area adults who are employed say that they must work on one or both days of the weekend. This is slightly less true of existing riders who are employed, possibly an indication of the fact that such employment is an obstacle to using transit to commute. More importantly, 37% of the potential riders said that they have weekend employment duties. In the absence of expansion of weekend service hours, this may tend to restrict the ability of these potential riders to use transit service.

Figure 31 Needing to use one's vehicle while at work (employed persons only)



	Rider	Potential rider	Non-rider	2015	2008	2004
Needs car for work and errands	26%	23%	27%	25%	25%	28%
Needs car for work	4%	14%	21%	16%	9%	16%
Needs car for errands	22%	30%	24%	26%	18%	19%
Does not need car at work	47%	34%	27%	32%	49%	37%

Needing to use one's vehicle while at work

Among other barriers to commuters who might wish to use transit, is the need to use one's personal vehicle during the workday for either work or personal reasons. The tendency to need one's car while at work appears to have varied from 2004 to 2015. In 2004, the percent who said they did not need their car at work stood at 37%. In 2008 it rose to 49% and in 2015 it had returned to a percentage (32%) closer to what it had been in 2004. Why such a pronounced variation in employee behavior would have occurred is unable to be explained by the survey data. The pattern in 2004 and 2015 is so consistent that we believe it is likely to be closer to the long-term norm.

The converse of these figures indicates one aspect of the scope of the challenge in attracting commuters to transit. That is, in 2015 69%, more than two thirds of employed persons say they need their personal vehicles during the work day.

As one would expect, those who currently use public transit are more likely (47%) than potential riders (34%) or non-riders (27%) to indicate that they do not need their car while at work. When people say they need their car during the work day, many say they need to run errands on the way to or from work or during the workday. Such errands may include truly mandatory functions like picking up or dropping off children at school or child care. Or they may include more optional activities such as shopping or recreation. In 2015, 26% of the total sample indicated running errands was the reason for which they needed the car during the work day. However, another 16% indicated they needed it for work purposes, and, finally, 25% indicated they needed it both for work purposes, and to run personal errands.

Figure 32 Interest in expanded services

Interest in expanded services					
		Rider	Potential rider	Non-rider	Total
Q33. Local Service that begins before 5 in the morning on weekdays.	Definitely would use	*13%*	*10%*	2%	7%
	Very likely to use	*8%*	*10%*	4%	7%
	A little more likely to use	16%	18%	9%	13%
	Would make no difference	56%	59%	83%	69%
	Not sure	8%	4%	3%	4%
Q34. Local Service that runs later than 9 at night on weekends.	Definitely would use	*25%*	*15%*	3%	11%
	Very likely to use	*27%*	*15%*	7%	13%
	A little more likely to use	16%	26%	15%	19%
	Would make no difference	28%	38%	71%	52%
	Not sure	4%	6%	4%	5%
Q35. Local service that runs more frequently than every 30 minutes.	Definitely would use	*31%*	*14%*	4%	12%
	Very likely to use	*21%*	*19%*	7%	14%
	A little more likely to use	10%	28%	23%	23%
	Would make no difference	33%	35%	61%	47%
	Not sure	5%	4%	4%	4%
Q36. Express Service between Olympia and Tacoma every thirty minutes all day long on weekdays.	Definitely would use	*24%*	*12%*	2%	9%
	Very likely to use	*21%*	*15%*	9%	13%
	A little more likely to use	22%	20%	18%	20%
	Would make no difference	29%	46%	67%	53%
	Not sure	5%	7%	4%	5%

Interest in expanded services

Service span, frequency, and coverage are all major issues in marketing transit, especially for the current rider with marginal loyalty to using transit and to the potential rider considering the use of transit. How do the transit market segments feel about these improvement in aspects of transit?

We can anticipate that non-riders will be unimpressed by the proposed increases in service since they have already denied interest in using any transit service at all. We are interested, therefore in the current and potential riders who say they "Definitely would use" or are "Very likely to use" the service (italicized in the table above). These responses do not constitute a prediction that these people would actually use these services. Nor do positive responses say anything about the frequency with which people might use them. But they are indicators of the market ceiling for the services, and of public readiness to pay attention to marketing and to consider them seriously.

Service span. Respondents were asked about earlier morning service on weekdays and later evening service on weekends. Both of these elements were given relatively low satisfaction ratings in the Customer Satisfaction Survey and in that survey they are among the top four service elements considered most important to improve. In Figure 32, the Market Segmentation Survey results show that a total of 21% of current riders and 20% of potential riders indicate an interest in earlier weekday service. However, and this is typical of most CJI passenger studies in which these options are provided, substantially greater percentages indicated interest in expansion of weekend evening hours. A total of 52% of current riders and 30% of potential riders expressed serious interest in that service expansion.

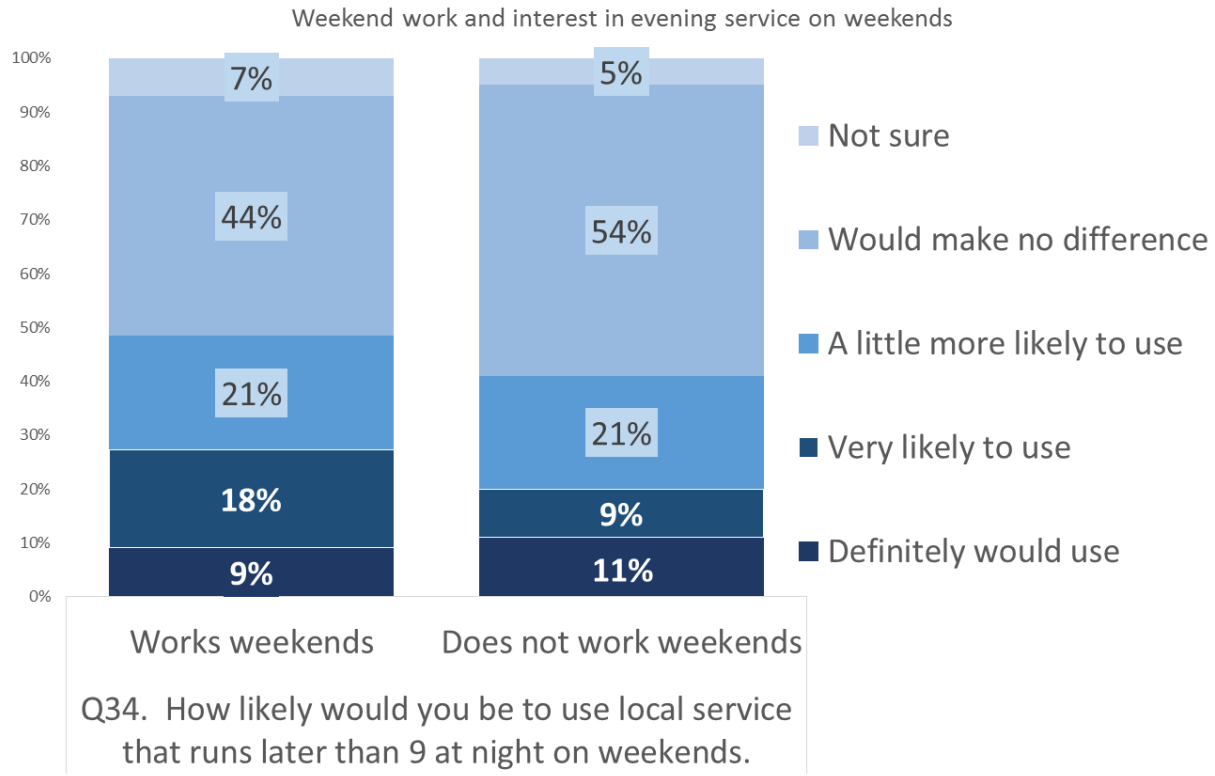
This is not surprising. The time buses stop running in the evening (not just weekends) was rated in the Customer Satisfaction Survey as the single service element most important to improve. In general, the reason for the importance of this service is that many employees need to work late, but added to this is a desire for additional hours of service to access recreation or evening study facilities.

Frequency. Frequency of service is critical to both riders and potential riders because it bears not only on the duration of the trip – very important in itself – but also on three other elements: (1) the efficiency of the transfer process, (2) the uncomfortable feelings of uncertainty about how long it will be until the arrival of the "next bus," and, (3) especially after dark, the sense of vulnerability while waiting for the bus. In the Customer Satisfaction Survey, frequency was the third most frequently mentioned element of service to improve (after evening service and on time performance), and, in that survey, it had a stronger impact on overall customer satisfaction ratings than service span. In the Market Segmentation Survey, total of 52% of current riders and 33% of potential riders indicated strong interest in greater frequency.

Coverage. According to the Customer Satisfaction Survey, 1.7% of current riders cite Tacoma as a commuting destination. Of those, 0.6% originate in Olympia. In the Market Segmentation Survey, 7% cite Tacoma as their usual destination for local trips, by all modes (see Figure 19). Thus, there is certainly a niche market for regular travel to Tacoma. Whether it is sufficient to sustain thirty minute express service frequency is different question, and one that cannot be answered by this survey.

A total of 45% of current riders and 27% of potential riders indicated they would be likely to use such a service.

Figure 33 Interest in service after 9:00 PM on weekends



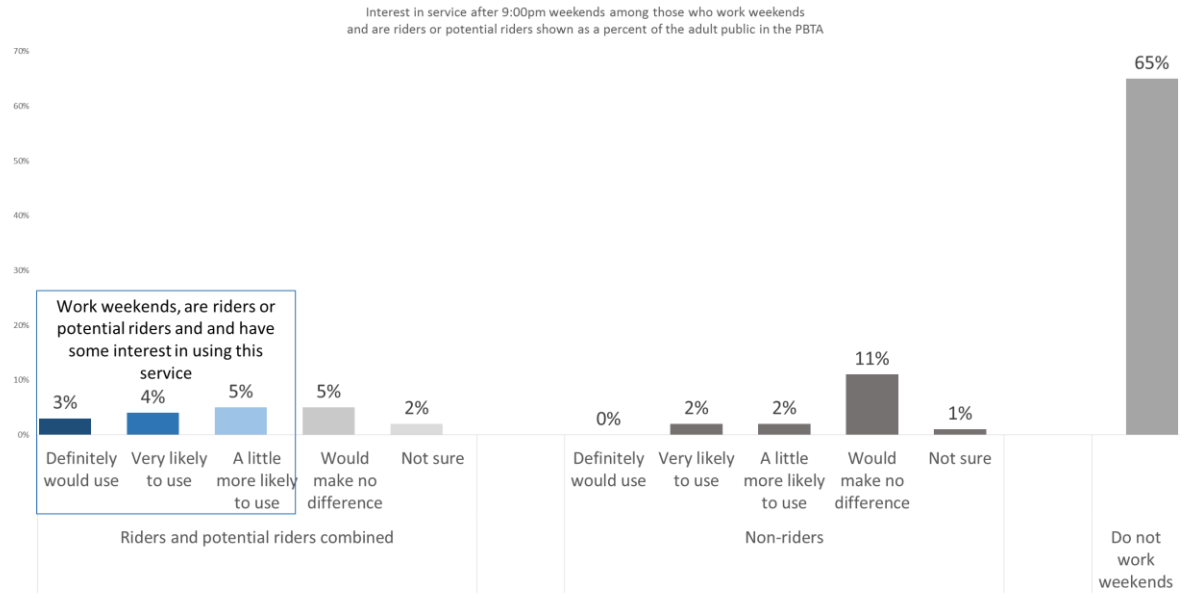
Interest in service after 9:00 PM on weekends

It seems likely that those who must work on weekends would be more interested in late evening service on the weekends because so many weekend jobs involve retail, restaurant, or other service functions in which work hours after 9:00 pm are the norm. Rider focus groups in other markets have consistently informed us that the lack of weekend evening service is a significant barrier to employment and a major financial incentive to finding other modes of transportation.

Indeed, when we compare those who work on weekends with those who do not, we find that although the relationship is not as strong as one might initially suppose, that those who work on weekends workers are more likely (a total of 27% definitely or very likely) than those who do not (20%) to respond positively to weekend service after 9:00 pm.

The relative weakness of the relationship should not be surprising for two reasons. First, this chart includes not only current riders and potential riders, but also non-riders who would not consider using transit in any event. Secondly, there are reasons other than employment such as recreation and shopping to use weekend service after 9:00 PM. Thus the fact that there is any relationship here is a clue to the importance of this service element.

Figure 34 Core market for service on weekends after 9:00 pm



Core market for service on weekends after 9:00 pm

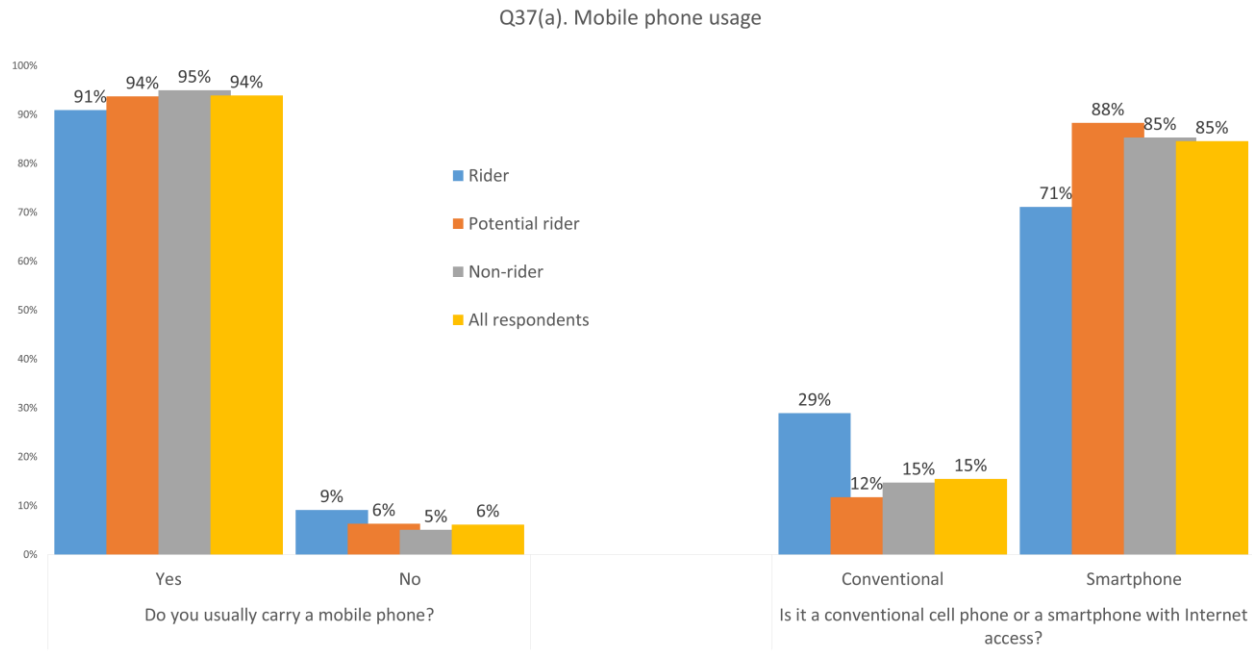
Another way to look at the potential market for service on weekends after 9:00 pm is to consider the people most likely to use it as a percentage of the total adult population. This approach is shown in Figure 34. Of the total adult public in the PBTA, a total of 12% meet several criteria:

- They work on the weekend
- They are riders or potential riders
- They express some level of interest from strong to weak, in using service after 9:00 pm on the weekend.

The niche market for this service is the 7% with the greatest level of interest in the service ("Definitely would use it" or "Very likely to use it"). We can further discount this because some of the weekend jobs would require a car, and some people would simply not follow through on their "good intentions." Assume that 30% ended up actually using the service, or 30% of 7%, or 2% of the adults. That would translate into a potential market of almost 2,000 persons with some readiness to consider using such a service.

Communications

Figure 35 Mobile phones

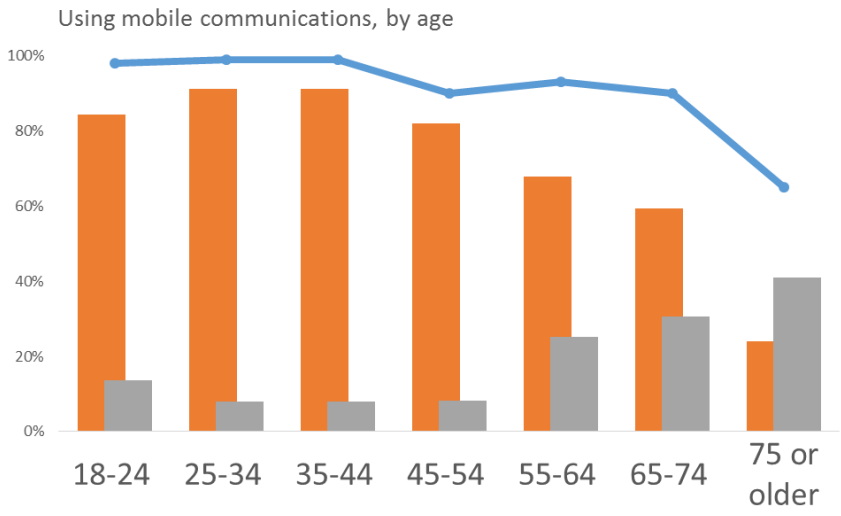


Mobile phone

Carrying a mobile phone of some type has become the norm throughout the United States and most of the world. In the current survey, 94% of all respondents indicated they usually carry a mobile phone. Of those who carry a mobile phone, 85% indicated that it was a smart phone with Internet access.

Current riders, as measured in this general population survey, are more likely (29%) than potential riders (12%) or non-riders (15%) to say they have only a conventional mobile phone, and not a smart phone. Nevertheless, 71% indicate they do have a smartphone with Internet access. As it happens, this is approximately consistent with the findings in the customer satisfaction survey conducted onboard Intercity Transit buses, in which 67% reported having Internet access.

Figure 36 Age and the use of smart phones

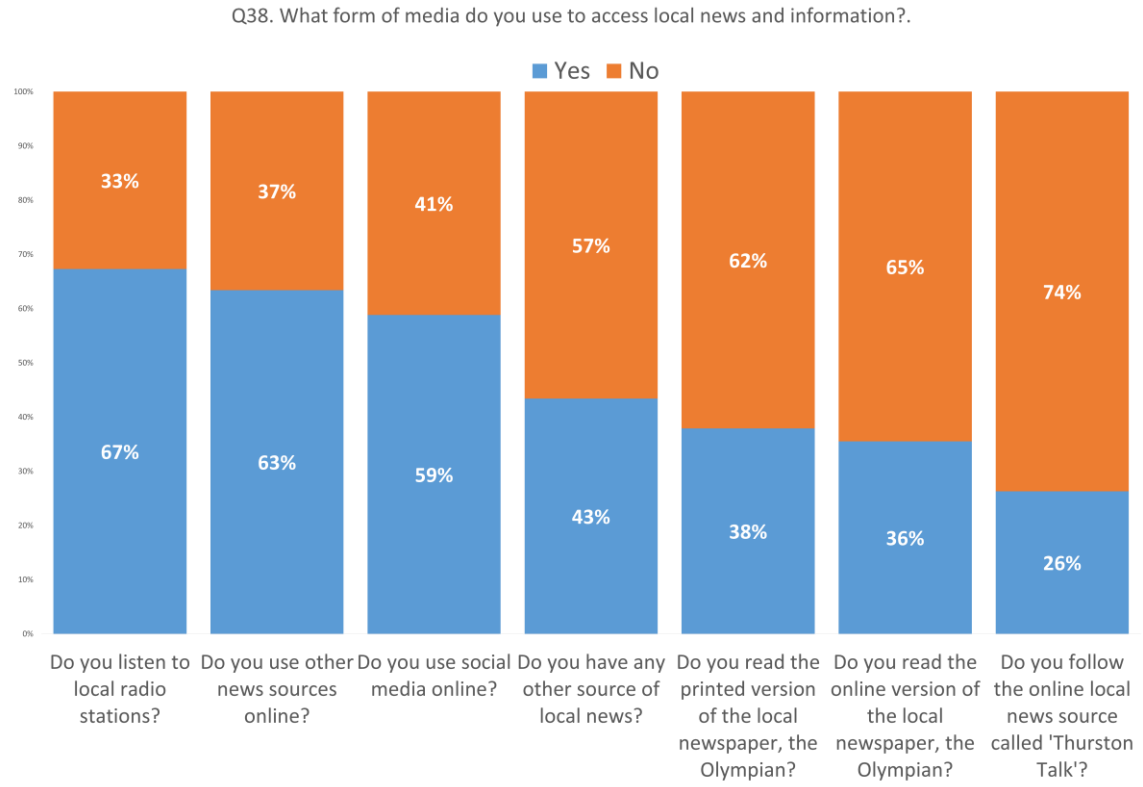


	18-24	25-34	35-44	45-54	55-64	65-74	75 or older
Smartphone	84%	91%	91%	82%	68%	59%	24%
Conventional cell phone	14%	8%	8%	8%	25%	31%	41%
Usually carries a mobile phone	98%	99%	99%	90%	93%	90%	65%

Age and the use of smart phones

It will surprise no one to learn that the use of smart phones in the greater Olympia area is age-related. While of the population 75 years old or older, only 24% indicate they carry a smart phone, 84% of the youngest group, 18 to 24 years old, and 91% of those between the ages of 25 and 44 indicate they carry smartphones. The tendency to carry a smart phone begins to decline among the population over 45 years of age. However, the tendency to carry one is still fairly dominant through the age of 74, declining from 82% in the age group 45 to 54 to 59% in the age group 65 to 74 and falling below 50% only in the age group 75 and older.

Figure 37 News sources

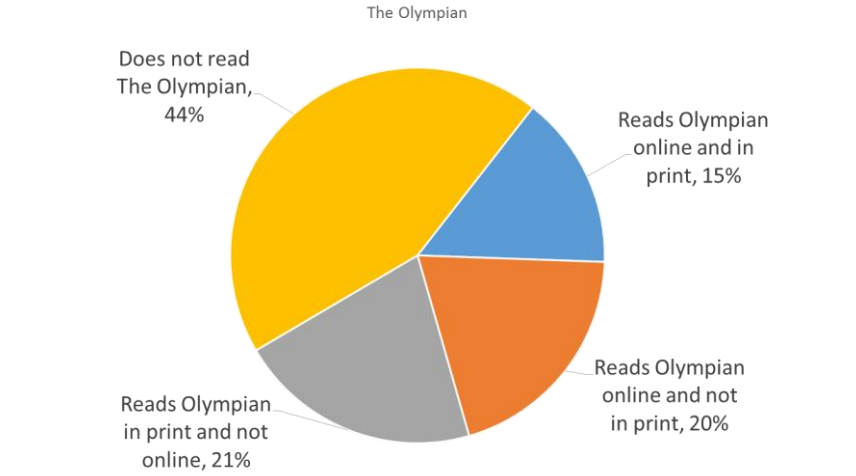


News sources

Respondents were asked what forms of media they use to access local news and information. They were asked specifically about six forms of media and were also asked a generic question regarding whether they used other sources of local news as well. Figure 37 is arranged in descending order of the frequency with which each medium was mentioned as a local news source. Many people tend to use multiple sources. Sources are not mutually exclusive.

Listening to local radio stations was mentioned most often as a news source (67%). This is not surprising since the vast majority of the respondents undoubtedly spend a great deal of time in their cars the most frequent venue for listening to the radio. Fifty-nine percent (59%) said they obtain local news and information from social media, and 63% said they have other news sources online. Use of The Olympian as a news source is particularly interesting because the percentages who read the print version (38%) are almost the same as those who read the online version (36%). A small following uses the online source "Thurston talk" (26%).

Figure 38 Reading The Olympian



Reading The Olympian

The fact that, like most newspapers today, The Olympian publishes both an online version and a print version provides an opportunity to examine the overlap in reader behavior between the two. The reader should keep in mind that this survey was not intended as a study of readership of The Olympian. The question about reading the paper is a simple dichotomous question, yes or no, regarding whether the respondent reads The Olympian. The question does not define what "read the Olympian" means in terms of frequency, and depth, as would be done in an in-depth readership study. Therefore, this finding should be taken as a good approximation, but not as a fine tuned piece of readership research.

Many respondents (44%) indicated they do not read the Olympian at all. However, it apparently maintains a robust readership because the balance, 56%, indicate they do read it. Among those who read the paper, 15% indicated they read it both in print and online. Another 20% read it online, but not in print, and the balance, 21%, in print and not online. We shall see in a later chart that these tendencies are age-related.

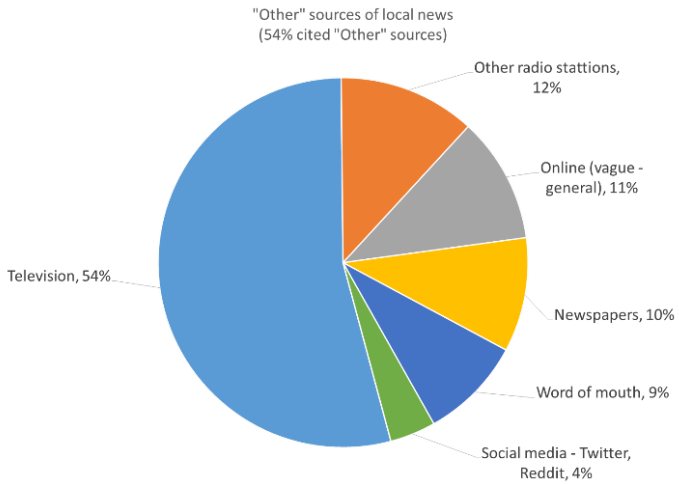
Figure 39 News sources of the market segments

Q38. What forms of media do you use to access local news and information?					
		Rider	Potential rider	Non-rider	Total
Do you use social media online?	Yes	61%	62%	54%	54%
	No	39%	39%	46%	46%
Do you use other news sources online?	Yes	64%	63%	61%	61%
	No	36%	37%	39%	39%
Do you listen to local radio stations?	Yes	60%	67%	68%	67%
	No	40%	33%	32%	32%
Do you read the online version of the local newspaper, The Olympian?	Yes	40%	37%	32%	32%
	No	60%	63%	68%	68%
Do you read the printed version of the local newspaper, The Olympian?	Yes	42%	39%	35%	35%
	No	58%	61%	65%	65%
Do you follow the online local news source called 'Thurston Talk'?	Yes	29%	29%	24%	24%
	No	71%	71%	76%	76%
Do you have any other source of local news?	Yes	48%	38%	45%	45%
	No	52%	62%	55%	55%

News sources of the market segments

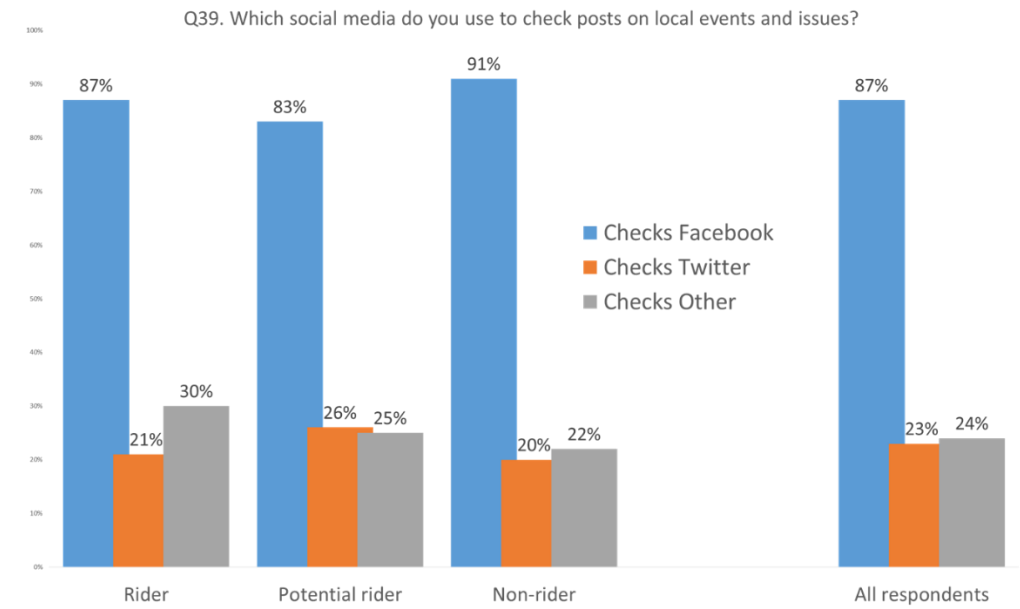
There are only minor variations among the transit market segments in terms of their sources of information on local affairs. There is a slightly lesser tendency for those who are current transit riders to listen to local radio stations, perhaps because they less often have access to car radios. Also, riders and potential riders appear somewhat more likely than the non-rider segment to say they get news from social media, The Olympian (both in print and online), and to follow "Thurston talk." These tendencies are not very strong, but they seem to suggest a pattern of perhaps greater interest in local news on the part of these two segments than among the non-riders.

Figure 40 Other sources of local news



Those who indicated they had other sources of local news (45%) were asked what those sources might be. Their responses were coded into the categories shown in Figure 40. The source most frequently mentioned was a generic mention of television (54%). Various radio stations were mentioned by 12%, online sources by 11%, newspapers other than The Olympian by 10%, word-of-mouth by 9%, and specific social media outlets, twitter and Reddit by 4%. (It should be noted, that these are not mutually exclusive with the categories shown in the table of Figure 39.) The full list of "other" sources is provide in Appendix A: "Other" sources of local news, page 67.)

Figure 41 Use of social media



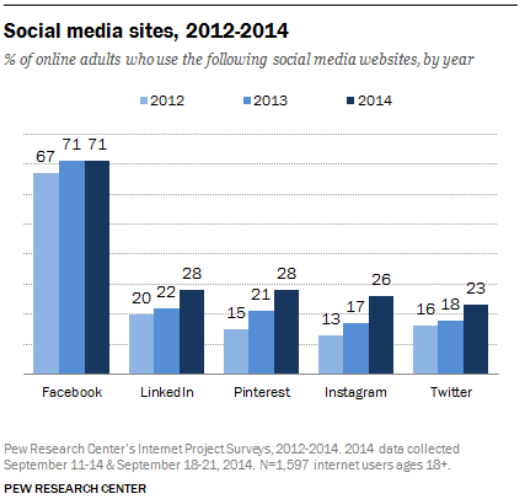
Social media use

Respondents who indicated they use social media were asked which social media they use to check posts on local events and issues. The vast majority of all respondents (87%) indicated that they use Facebook for such purposes. Facebook is similarly dominant among all three transit market segments. However, of the entire sample 23%, or almost one fourth, indicated they check Twitter. Another 24% said they check other online sources. Although the names of specific "other" online sources were not captured in the data, one can assume that they follow the current national trends.

Figure 42 Social media

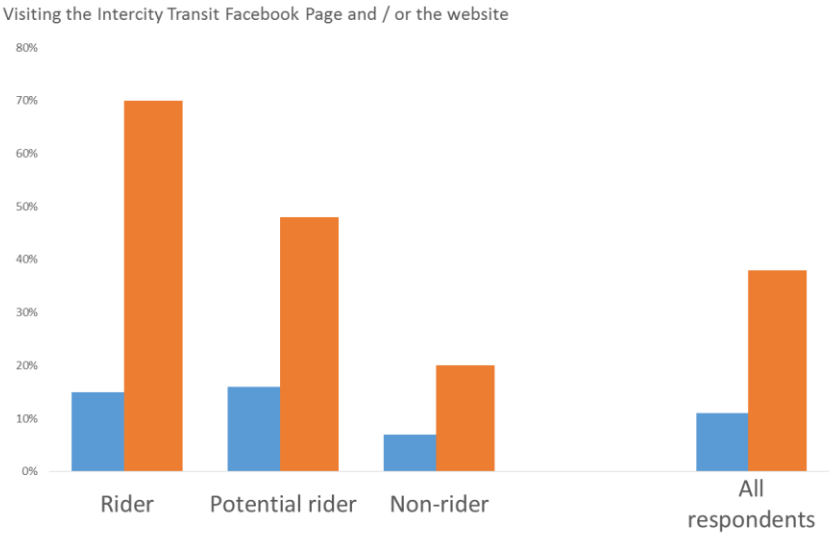
Source: www.pewinternet.org/2015/01/09/social-media-update-2014/

In a new survey conducted in September 2014, the Pew Research Center finds that Facebook remains by far the most popular social media site. While its growth has slowed, the level of user engagement with the platform has increased. Other platforms like Twitter, Instagram, Pinterest and LinkedIn saw significant increases over the past year in the proportion of online adults who now use their sites.



Many sources are available that detail social media utilization nationally. Among the most reliable survey sources is the Pew Research Center. Their most recent research indicates that sites other than Facebook, while still relatively small, have been growing. The visual sites such as Instagram and sites such as Pinterest have generated considerable interest because of their tendency to appeal to younger users.

Figure 43 Facebook and website

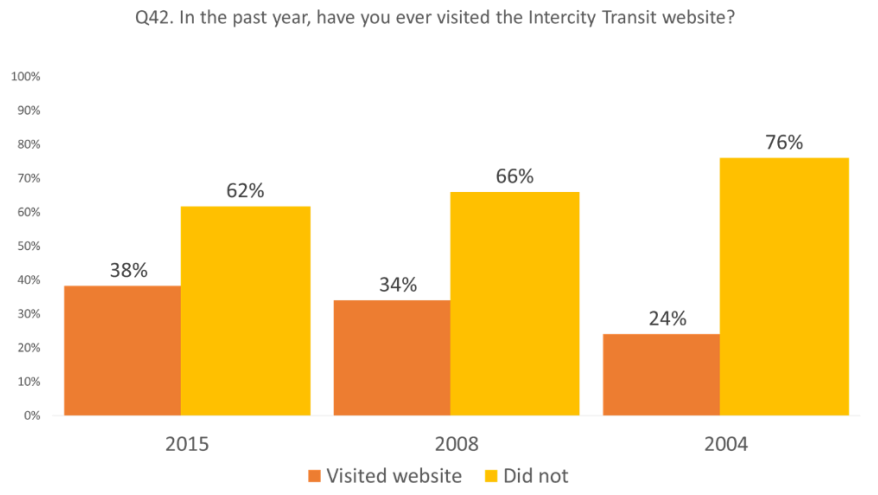


	Rider	Potential rider	Non-rider	All respondents
Have you visited the Intercity Transit Facebook page? (% "Yes")	15%	16%	7%	11%
In past year, have you ever visited Intercity Transit website? (% "Yes")	70%	48%	20%	38%

Facebook page and website

Although Facebook is very widely used, many more local people have accessed the Intercity Transit website during the past year than have visited the system's Facebook page. This fact suggests that the two sources of information are perceived very differently. It is likely that the website is seen as an Internet *destination* which a user goes to for specific information, while Facebook is seen as something more personal, and something that one browses with no particular piece of information being sought. In either case, given the prevalence of smartphones, Intercity Transit should assume that much of the access is via mobile devices.

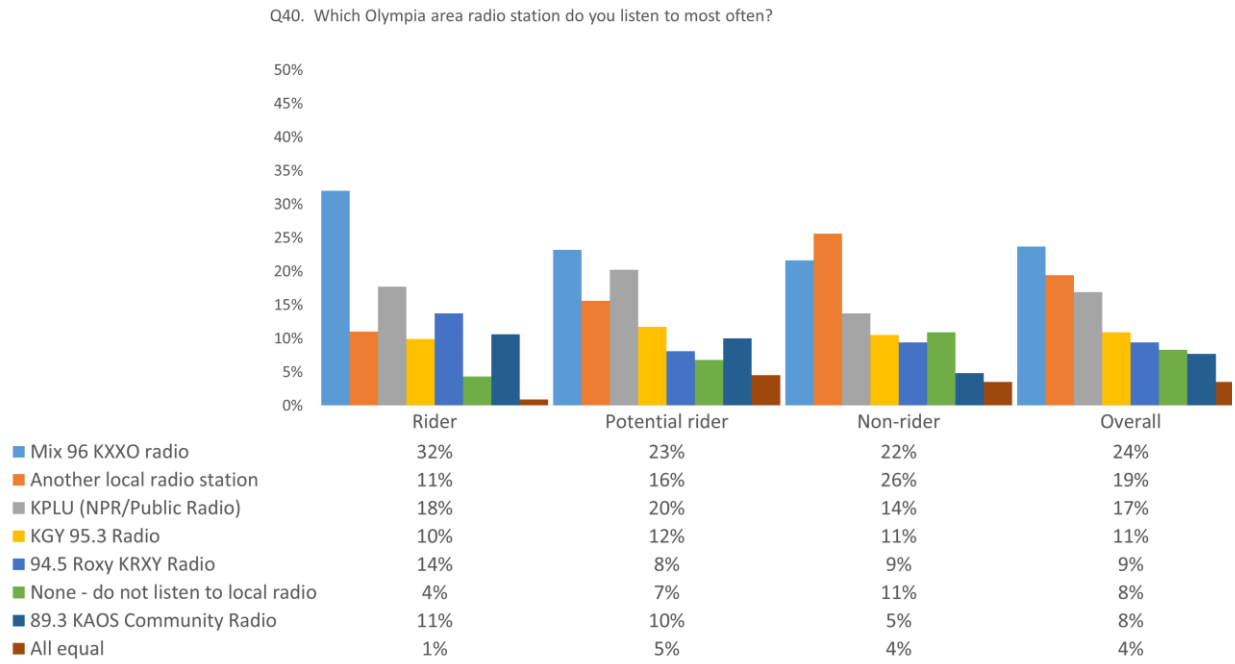
Figure 44 Visiting the website



As one would expect, there is a very substantial difference among the three transit market segments in terms of visiting the Intercity Transit website. Riders are far more likely to have visited the Intercity Transit website (70%) than are the potential riders (48%), but the latter are more than twice as likely as the non-riders (20%) to have visited the website.

The tendency to visit the intercity transit website has increased substantially from 24% in 2004, to 34% in 2008, and 38% in 2015.

Figure 45 Radio



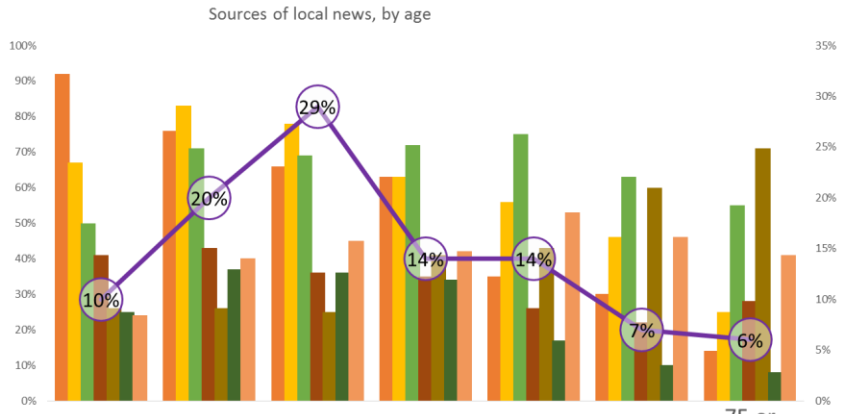
	Rider	Potential rider	Non-rider	Overall
Mix 96 KXXO radio	32%	23%	22%	24%
Another local radio station	11%	16%	26%	19%
KPLU (NPR/Public Radio)	18%	20%	14%	17%
KGY 95.3 Radio	10%	12%	11%	11%
94.5 Roxy KRXY Radio	14%	8%	9%	9%
None - do not listen to local radio	4%	7%	11%	8%
89.3 KAOS Community Radio	11%	10%	5%	8%
All equal	1%	5%	4%	4%

Radio

As we saw in Figure 37, radio is the medium used by more people than any other for local information. Mix 96 (KXXO Radio) is the station that more people cite than any other, with 24% saying they listen to it.

The use of specific radio stations varies among the transit market segments. While almost one third (32%) of riders cite Mix 96 as their station of choice, fewer potential riders (23%) and non-riders (22%) site that source.

Figure 46 Differences in news sources among age groups



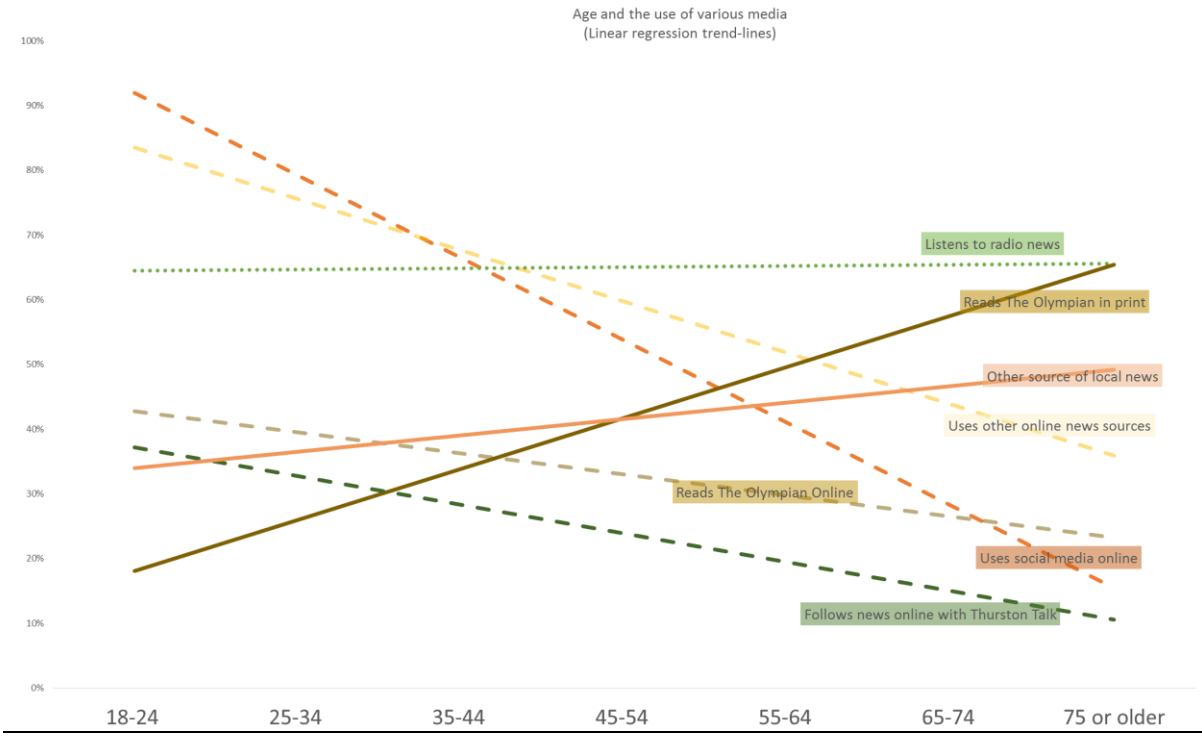
	18-24	25-34	35-44	45-54	55-64	65-74	75 or older
Use social media online	92%	76%	66%	63%	35%	30%	14%
Use other news sources online	67%	83%	78%	63%	56%	46%	25%
Listens to local radio stations	50%	71%	69%	72%	75%	63%	55%
Reads the Olympian online	41%	43%	36%	35%	26%	22%	28%
Reads the Olympian in print	26%	26%	25%	41%	43%	60%	71%
Follows news on 'Thurston Talk'	25%	37%	36%	34%	17%	10%	8%
Uses another source of local news	24%	40%	45%	42%	53%	46%	41%
Target market: Riders & potential riders	10%	20%	29%	14%	14%	7%	6%

Differences in news sources among age groups

When we examine the differences among age groups in terms of their utilization of the several types of media, we find that there are fairly distinct patterns of differences. In considering age-related consumption of media, it is also important to keep in mind the proportion of the total adult public in each of the age groups. For this reason, in the chart above, while the various media are shown in vertical bar format, the population distribution is shown as a line.

Not surprisingly, the tendency to use social media online is closely related to age. This is evident from the steadily declining percentage from the ages of 18 to 24 to the age of 75 or older. Use of other online news sources is similar, although the youngest age group is somewhat less likely than their slightly older peers to cite social media as a source of local news and information. However, from the ages of 25 and older, the use of other online sources declines. Radio is an exception. The relationship is virtually flat between age and utilization of radio for local information, at least between the ages of 25 and 64. Reading the Olympian online decreases with age, while reading it in print increases with age. As with other online sources, "Thurston talk" is used by fewer and fewer people as age increases (the exception again being the youngest).

Figure 47 The relationship between age and source utilization



The relationship between age and source utilization

To visually simplify the relationship between age and the utilization of various types of media source, Figure 47 presents a simplified statistical relationship diagrammatically.[10] The lies in the chart are determined by computing the statistical relationship between age and the percent who say they use each source on information.

In the figure above, the types of media that decline in use with age are shown as broken lines, while those forms of media for which utilization increases with age are shown as solid lines. The one source, radio, which has very little relationship to age, is shown as a flat dotted line.

The objective of the chart is simply to show how as the population ages the information sources people rely on are going to continue to change in the direction of online sources of various kinds as those who are now younger age, and carry their media habits with them. The change will be more rapid in some cases better than others. For example the use of social media is very closely related to age, whereas the tendency to read The Olympian newspaper online declines with age but not nearly as dramatically.

[10] Although some of the relationships between age and the use of sources are curved rather than straight line (for example listening to the radio which starts low, rises, and falls again later), linear rather than polynomial regression was used to develop the lines shown in the chart as a means of simplifying the visual presentation without distorting things too badly.

Appendix A: "Other" sources of local news

Other sources of local news

TV
FACE BOOK
WORD OF MOUTH
SEATTLE TIMES
KOMO NEWS
I WATCH TV
TV NEWS KING FIVE NEWS
INTERNET
NISQUALLY VALLEY NEWS
LOCAL NEWS ON TV
GENERALLY NEWS WEBSITES AND MILLIONS OF OTHER PLACES TO GET NEWS
KING SIZE NEWS NPR
NEWS TRIBUNE
SMART NEWS
SOMEONE WAS THERE AND THEY TOLD ME
TV AND INTERNET
TV; RADIO
USUALLY JUST THE NIGHTLY NEWS ON TV, I WATCH IT ONCE IN A WHILE
YAHOO NEWS AND GOOGLE NEWS
RADIO AND TV
THE KING 5 NEWS
I LISTEN TO THE KAOS RADIO
MY EMPLOYMENT
TV AND RADIO
TACOMA NEWS
TALKING WITH THE COMMUNITY, THAT'S MY MAIN SOURCE, WORD OF MOUTH, SOMETHING PASSED ON FROM PERSON TO ANOTHER PERSON VERBALLY.
NPR
ONLINE
TV, RADIO AND INTERNET
INTERNET AND LOCAL TV
KING 5 NEWS
CVS
GOOGLE NEWS
I GET EMAILS FROM ALL THE CITIES ABOUT INFORMATION ON TRANSPORTATION AND WHAT'S HAPPENING THAT DAY
OLYMPIA SCHOOL DISTRICT NEWS PAGE
ON MY PHONE
ON TV
THE NEWS CHANNEL; THE KING 5; THE KOMA 4; THE Q13
TV AND NEWS PAPERS
TV OR WHATEVER CHANNEL 4 IS.
RADIO
COMMUNICATION WITH OTHER PEOPLE AND TV
JUST THE TV
KING 5

KIRO CHANNEL 7 NEWS
NEWSPAPER AND TV
TWITTER
WATCH TV
THE COMMUNITY TRIBUTE
TV, CHANNEL 4 KOMO AND IN THE EVENING CAIRO CHANNEL 7
CABLE
FLIP BOARD
NEXT DOOR.
GOOGLE
NPR NEWS AND WHEN SHE IS DRIVING
RADIO; WORD OF MOUTH
SOMETIMES I WATCH THE NEWS ON THE TV AND THAT'S IT
TV NEWS
VALLEY NEWS
CAIRO NEWS AND KOMO 4
CNN
COMCAST CABLE
PRINT
FROM OLYMPIA BLOG
FROM OTHER PEOPLE
I JUST READ SOME OF THE OTHER LOCAL PAPERS, LIKE SMALLER NEWSPAPERS
Q13 FOX NEWS
REGULAR NEWS
TACOMA NEWS TRIBAL AND REGIONAL NEWS SITES
THE YELM PAPER
THURSTON COUNTY SCANNER
VARIOUS FORMS ONLINE TO GET LOCAL NEWS
YAHOO LOCAL NEWS
RADIO TV
I LISTEN TO AM RADIO A LOT.
INTERNET AND TV
JUST THE TV, LOCAL NEWS.
YOU TUBE AND WORLD NEWS, LIKE CNN AND STUFF, I DON'T HAVE CABLE
POWER AND LIGHT
THERE'S ABOUT 10 CHANNELS, THERE'S A VARIETY ON CABLE
TV AND LOCAL NEWS
TV; SEATTLE TIMES
YELM NEWSPAPER AND VALLEY NEWS.
CABLE TV
CHANNEL 7
FRIENDS, CHURCH AND BIKE CLUB.
I READ THE TACOMA TRIBUNE AND I LISTEN TO KOMO AND CAIRO
I WATCH THE NEWS ON THE TV
I WATCH THE TV AND READ THE NEWSPAPER FOR LOCAL NEWS. ALSO I WILL GOOGLE SEARCH BREAKING NEWS.
KING 5 ONLINE

NEIGHBORHOOD COMMUNITY NEWSLETTER
ONLINE NEWS SOURCES
REDDIT
REGULAR RADIO, LIKE AM, FM RADIO AND ONLINE RADIO
SEATTLE TIME AND KING 5 NEWS
THE MONTHLY NEWS LETTERS COMES OUT AROUND HERE
JUST FROM MY COMPUTER AND THE RADIO
SEATTLE NEWS
THE TACOMA NEWS TRIBUNE AND LOCAL TV STATIONS E
TV AND COMPUTER OCCASIONALLY
CHANNEL 4, 5 AND 7
COMCAST, LOCAL RADIO KGY 96.6
EMAIL
FROM FRIENDS AND FAMILY
FROM GOSSIPING WITH FRIENDS
FROM NEIGHBORS
FROM PEOPLE
I TALK TO PEOPLE ; WELL I TALK TO PEOPLE ABOUT WHAT'S GOING ON AND I TALKED ABOUT PROTESTS AT THE CAPITAL BUILDING
JUST THE CELL PHONE
KING SIZE NEWS
KOMO4NEWS.COM
KPLU ; RADIO STATION; KAOS RADIO
LOOKING AT THE COMMUNITY BULLETIN BOARDS AT STORES AND COFFEE SHOPS
NEWS ON TV
NEWS TRIBUNE TACOMA
NORTH OLYMPIA
NPR RADIO & THE TV
PEOPLE THAT READ THE NEWS OR LOOK AT THE NEWS
RADIO KAOS
REDDIT IS CALLED OLYMPIAN REDDIT AND THERE'S SOMETHING CALLED HOLLYWOOD
SEATTLE PAPERS ONLINE
STATE DOT, TWITTER, CITY OF OLYMPIA ON TWITTER, CITY OF LACEY ON TWITTER
THE OLYMPIA, TV
THERE ARE BLOGS I READ AND THE OLD OLYMPIAN
TV AND TALKING TO FRIENDS
TV BROADCASTS
TV KOMO STATION 4
WEATHER CHANNEL AND PET CONNECTION.
WELL I'M INVOLVED IN THE EMERGENCY SERVICES COMMUNITY IN THURSTON COUNTY; N
WORD OF MOUTH, FREE NEWSPAPER OR TV
WORKS IN PROGRESS; OLYMPIAN POWER AND LIGHT COOPER POINT JOURNAL
LOCAL TV STATIONS
SOME INTERNET AND ALSO TV
TV NEWS VERY MUCH
WORD OF MOUTH AND RADIO
MY MOTHER, SHE IS THE DEPUTY MAJOR OF LACEY

MY NEIGHBOR WHO IS A GOSSIP HOUND; THEY TELL ME EVERYTHING ABOUT THE NEWS
FRIENDS
IT WOULD BE FROM THE SOCIAL MEDIA
LOCAL BROADCASTING
NOTHING
RADIO 97.7 88.5 NPR
RADIO AND TV NEWS
THE TV AND LOCAL NEWS
TV RADIO
THE NATIONAL PUBLIC RADIO KPLU AND KPOW
TV; ABC, CHANNEL 4; NBC, CHANNEL 5
WHEN I WATCH THE TV I INCORPORATE MORE INFORMATION ABOUT IMPORTANT EVENTS.
WORD OF MOUTH AND OTHER PRINTED MATERIALS
LITTLE HOLLYWOOD BLOG
MY GIRL FRIEND
NPR STATION
RADIO; 96.1; CHANNEL 4, 5 AND 7
REGULAR TV NEWS OUT OF SEATTLE AND THE SENIOR NEWS, SOMETIMES THAT HAS GOOD INFORMATION TOO.
SEATTLE PAPER & CABLE NEWS
THE INTERNET
THE TV STATIONS SOMETIMES SAY STUFF ABOUT THE LOCAL NEWS
TV AND THE COMPUTER
TV NEWSPAPER AND INTERNET
FROM PEOPLE TALKING
INFORMATION FROM THE COUNTY.
NISQUALLY VALLEY NEWSPAPER
JUST GOOGLE
KING5.COM
KOMO, RADIO 950 AND 710 RADIO
LOCAL NEWS
THE SEATTLE TIMES
BOSTON HARBOR
BROADCAST TV NEWS
I GATHER NEWS FROM CHANNEL 13 NEWS STATION DOWN IN SEATTLE. IT HAS BEEN DESCRIBED AS A TV NEWS BROADCAST BUT I COULD ALSO BE FOUND ONLINE.
I GO TO PRETTY MUCH ALL OF THE RADIO STATIONS WEBSITES, THE TV WEBSITES AND THE NEWSPAPER WEBSITE
I SUBSCRIBE TO RSS FEED FROM KING TV AND CAIRO TV
KOMO AND ONLINE
LOCAL 4, 5 OR 7
NEIGHBORS AND CHECKING THE SIGNS
NEWS SITE IN MY AREA
NISQUALLY NEWS
NORTH THURSTON SCHOOL DISTRICT; NE
ON FACE BOOK, THURSTON COUNTY TALKS
PEOPLE THAT I KNOW, THAT WORK LOCALLY

RADIO TV ONLINE AND THE PRINT THROUGH THE MAIL
RUMORS AND INNUENDO
SEATTLE
SEATTLE NEWS AND YAHOO
SOMEWHERE ONLINE
TACOMA PAPER AND THE NEWS TRIBUNE
THE RADIO; MIX 96 KTY KPLU
THURSTON TALKS; I GET MY NEWS FROM THE RADIO
TV, CHANNEL 2 OR 3
TV, KING 5 NEWS, KOMO NEWS
TV; I JUST WATCH LOCAL CHANNELS FOR THE NEWS; CHANNELS 45 AND 5; I JUST USE IT FOR THE NEWS
VERBAL
WELL WE USUALLY USE TWITTER AND STUFF.
WORKS IN PROGRESS AS A NEWS SOURCE
A FRIEND THAT WORKS FOR THE NEWSPAPER.
I PICK UP TWO LOCAL FREE PAPERS
I READ TACOMA AND I READ IN SEATTLE TIMES
JUST TV RADIO AND NEWSPAPER
KPLU DOES LOCAL NEWS
LOCAL NEWSPAPER IN LEWIS COUNTY
LOCAL TV STATIONS LIKE 4, 5 AND 7
NATIONAL NEWS
PUBLIC RADIO STATION
RADIO; LOCAL RADIO STATIONS, OLYMPIA
THE TV AND THE INTERNET
TV AND THE CAR RADIO.
TV COMPUTER SMART PHONE
TV, RADIO AND NEWSPAPER

Appendix B: "Other" Radio Stations

Station	% of all survey respondents
Mainstream station or does not listen to radio	86.2%
100.7 KKWF	0.4%
101.1 KGHO	0.1%
101.5 KPLZ	0.2%
102.5 KZOK	0.3%
103 OR 107-E-TALK RADIO ON SMARTPHONE POLITICS	0.1%
105.3 KCMS CHRISTIAN	0.0%
106.1 KBKS	0.6%
106.1 KISS FM	0.2%
106.9 KRWM	0.1%
107.7 KNDD	0.2%
570 AM KVI	0.1%
680 AM KBRD	0.2%
710 AM KIRO	0.6%
770AM KTTH AND 570AM KVI	0.1%
88.1 KWAO CHRISTIAN RADIO	0.7%
88.9 KGHP	0.1%
880 AM KIXI SEATTLE	0.1%
90.1 KPLI	0.0%
92.5 KQMV	0.1%
93.3 KPWK	0.4%
93.7 KLSY	0.5%
94.1 KMPS	0.2%
94.9 KUOW	0.2%
95.1	0.2%
95.1,97.1 AND 104.7	0.4%
95.3 FM K237FR (KYYO)	0.4%
95.7 FM	0.0%
950 AM KJR	0.1%
96.2 6	0.1%
96.5 KJAQ	0.4%
96.9 KYYO	0.4%
97.3 KIRO	0.1%
97.7, KOMO	0.3%
98.1 CLASSIC KING	0.1%
99.9 KISW	0.4%
99.9 OR 97.3	0.4%
A LOCAL AM STATION KBRAD	0.0%
A LOCAL RADIO STATION DOWNTOWN	0.1%
AM 680	0.1%
CAIRO	0.1%
CHRISTIAN RADIO; ITS FROM CENTRALIA 90.5	0.1%

CHRISTIAN STATION	0.1%
COMO 98.1	0.1%
COUNTRY MUSIC STATION WOLF STATION	0.1%
FOX NEWS	0.1%
I CHANGE ALL THE TIME TO ALL KINDS OF ODD BALL ONES, THE MAIN ONES ARE BORING	0.1%
I HEART RADIO	0.1%
I LISTEN TO 99.9 AND 104.9	0.2%
INTERNET RADIO TOMLEY	0.2%
KAOS RADIO STATION, COLLEGE EVERGREEN RADIO STATION	0.2%
KAYO	0.1%
KBRD	0.1%
KGY	0.2%
KGY 102.5	0.2%
KGY 1240 AM	0.1%
KIJR	0.2%
KIRO	0.3%
KISW	0.2%
KLXY	0.1%
KMAS	0.1%
KOMO	0.2%
KTTH	0.0%
KUOW	0.3%
LOCAL AT NOON	0.1%
MUSIC CHOICE ON THE TV	0.1%
PAPN	0.0%
ROCK STATION, ESPN OR NEWS TALK 570AM	0.1%
SEATTLE RADIO	0.5%
SPIRIT RADIO 105.3	0.2%
TACOMA 92.5	0.2%

Age, Income and the Matter of Tax Support for Public Transit

Demographics of attitudes toward the importance of, and tax support for, public transit

Age		18 to 39	40 to 64	65+	All Respondents
Q6. I would like to ask you various questions about transportation in your community. First, how important is it to have public transportation available in your community? Is it...	Extremely important	37%	42%	33%	38%
	Very important	38%	30%	27%	33%
	Somewhat important	16%	14%	17%	15%
	Not very important	3%	6%	9%	5%
	Not important at all	7%	6%	12%	7%
	(VOL) Not sure	0%	1%	2%	1%
Q30. Intercity Transit, receives tax support from local and national sources as well as having revenue from fares. How good a job do you believe Intercity Transit does with using that tax money?	Excellent	15%	21%	18%	18%
	Very good	40%	32%	35%	36%
	Neither good nor poor	20%	16%	12%	17%
	Poor	2%	2%	4%	2%
	Very poor	2%	2%	1%	2%
	(VOL) Not sure	22%	27%	30%	25%
Q32. Overall, how well would you say Intercity Transit is doing in providing these kinds of services? It is doing ... [READ RESPONSES]	Extremely well	22%	18%	16%	19%
	very well	55%	55%	50%	54%
	not very well	9%	6%	9%	8%
	poorly	3%	4%	4%	4%
	(VOL) Not sure	11%	17%	20%	15%

Income		Less than $20,000	$20,000 to $49,999	$50,000 to $79,999	$80,000 or more	All Respondents
Q6. I would like to ask you various questions about transportation in your community. First, how important is it to have public transportation available in your community? Is it...	Extremely important	57%	40%	33%	35%	38%
	Very important	35%	33%	33%	31%	33%
	Somewhat important	5%	14%	20%	19%	15%
	Not very important	3%	1%	8%	5%	5%
	Not important at all	0%	10%	5%	9%	7%
	(VOL) Not sure	0%	1%	1%	1%	1%
Q30. Intercity Transit, receives tax support from local and national sources as well as having revenue from fares. How good a job do you believe Intercity Transit does with using that tax money?	Excellent	28%	16%	10%	23%	18%
	Very good	47%	29%	39%	39%	36%
	Neither good nor poor	6%	24%	18%	16%	17%
	Poor	4%	2%	2%	2%	2%
	Very poor	0%	2%	2%	1%	2%
	(VOL) Not sure	14%	27%	29%	18%	25%
Q32. Overall, how well would you say Intercity Transit is doing in providing these kinds of services? It is doing ... [READ RESPONSES]	Extremely well	21%	20%	21%	22%	19%
	very well	69%	51%	54%	54%	54%
	not very well	5%	6%	5%	10%	8%
	poorly	2%	6%	2%	3%	4%
	(VOL) Not sure	3%	16%	18%	11%	15%

Appendix D: Questionnaire

Intercity Transit Market Segmentation Survey Questionnaire, 2015

SECTION A: INTRO, AWARENESS AND CURRENT MODE

Hello, We are conducting a survey in the Thurston County area about community issues. My name is…… , and I am with CJI Research, a professional market research firm. I assure you we are not selling anything, we are strictly interested in your opinions. May I speak with the youngest person in your household who is eighteen or older? [IF THAT PERSON IS NOT AVAILABLE, ASK FOR ANOTHER ADULT 18 OR OLDER]

SECTION A: SCREENING, CATEGORIZATION AND ONE BASIC VALUE ITEM

1. Interviewer indicate gender by observation
   (1) Male
   (2) Female

2. Note whether this respondent is from the landline or cell sample
   (1) Landline
   (2) Cell

FIRST QUESTION

3. Am I speaking to you on a cell phone now?
   (1) Yes → Are you in a place that is safe to talk, or are you driving or in an unsafe location? (If not in safe place or if driving – arrange call back)
   (2) No → CONTINUE WITH Q4

4. How do you handle your personal telephone calls? Do you:
   (1) use a cell phone for all calls
   (2) use a cell phone for more than half my calls
   (3) use a cell phone for about half of my calls
   (4) use a cell phone for less than half my calls
   (5) REFUSED [TERMINATE]

5. To protect privacy please do ***not*** give us an address, but would you tell us which of the following areas you live in?
   (1) Olympia
   (2) Lacey
   (3) Yelm
   (4) Tumwater
   (5) Unincorporated areas of Thurston County
   (6) Other (a)
      (a) Is that in Thurston County?
         (1) Yes -> Continue
         (2) No → Thank and TERMINATE

6. I would like to ask you various questions about transportation in your community. First, how important is it to have public transportation available in your community? Is it…
   (1) Extremely important
   (2) Very important
   (3) Somewhat important
   (4) Not very important
   (5) Not important at all
   (6) (VOL) Not sure

7. Do you have a working car, truck, motorcycle or motor scooter available for your use on most days?
   (1) Yes
   (2) No
   (3) REF

8. So that I will know what questions to ask you about getting around in the greater Olympia area, would you tell me whether you are you presently employed, a homemaker, retired, unemployed?
   (1) employed outside your home (9, then 10)
   (2) a student who is also employed (9, then 10)
   (3) a student and not also employed (9, then 10)
   (4) work from home (9, then 15)
   (5) homemaker (9, then 15)
   (6) retired (9, then 15)
   (7) unemployed (9, then 15)
   (8) Other (9, then 15)
   (9) REF [TERMINATE]

9. AUTO-CODE: IF Q8=1 or 2 or 3, Q9=1. ALL OTHERS = 2 [THAT IS: IF A RESPONDENT IS EMPLOYED OUTSIDE THE HOME OR A STUDENT OR BOTH S/HE IS A COMMUTER]
(1) COMMUTER (CONTINUE WITH Q10)
(2) NOT A COMMUTER (SKIP TO Q15)

10. How do you commute to [work / school], do you drive alone, take another adult along, get a ride with others in a carpool or a vanpool, or do you go by bus, walk, bicycle, or how? [NOTE: IF ASKED THE DIFFERENCE BETWEEN CAR AND VANPOOL: A carpool uses commuters' own cars and includes 2 or more commuters. A vanpool uses a van that is provided by the transit agency to a driver, involves five or more people, and people pay a monthly fee to ride with that driver.]
    (1) Drive alone (including by car, motorcycle, motor scooter, truck) (0)
    (2) Drive, taking another adult along (11)
    (3) Get a ride with others / carpool (13)
    (4) Vanpool (13)
    (5) Bus / "IT" [RESPONDENT MAY USE THE ACRONYM "IT" PRONOUNCED EYE-TEE] **[THIS IS A "RIDER." AUTO-CODE Q17 as "1=RIDER" AND GO TO Q22]**
    (6) Walk / skateboard (13)
    (7) Bicycle (13)
    (8) REF [TERMINATE]

11. Do you always drive, or do you sometimes use another mode such as the bus, a carpool, bike or walk?
    (1) Take the bus (12)
    (2) Intercity Transit bus / "IT" [RESPONDENT MAY USE THE ACRONYM "IT" PRONOUNCED EYE-TEE] (14)
    (3) Carpool (13)
    (4) Vanpool (13)
    (5) Walk (13)
    (6) Bicycle (13)
    Always drive alone (13)

12. Which bus system do you use? **[DO NOT READ RESPONSES]**
    (1) Intercity Transit (14)
    (2) Sound Transit (13)
    (3) Pierce Transit (13)
    (4) Other : _____ (13)

13. Do you happen to-know the name of the local bus service serving Olympia, Lacey, Tumwater, and Yelm? **[UNAIDED - DO NOT READ RESPONSES]**
    (1) Intercity Transit / "IT" [RESPONDENT MAY USE THE ACRONYM "IT" PRONOUNCED EYE-TEA] (14)
    (2) The bus company (a, then 14)
    (3) The city (a, then 14)
    (4) Sound Transit (a, then 14)
    (5) Pierce Transit (a, then 14)
    (6) Other name given (a, then 14)
    (7) Not sure (a, then 14)
        (a) Just so you'll know while I ask you other questions, the local public transportation system I want to ask about is called Intercity Transit [NOW CONTINUE WITH 14]

14. When and if you drive to work, do you have to pay for parking?
    (1) Yes (0)
    (2) No (0)
    (3) I never drive to work (0)
    (4) DK/REF (0)

15. **[ASK IF Q9=2 - NON-COMMUTERS]** For your usual trips in the areas of Olympia, Tumwater, Lacey and Yelm, do you most often drive alone, take other adults along, get a ride with other people in a carpool or a vanpool, or do you go by bus, walk, bicycle, or how?
    (1) Drive alone (including by car, motorcycle, motor scooter, truck) (0)
    (2) Drive, taking other adults along (0)
    (3) Get a ride with others / carpool (0)
    (4) Vanpool (0)
    (5) Bus **[THIS IS A "RIDER." AUTO-CODE Q17 as "1=RIDER" AND GO TO Q22]**
    (6) Walk / skateboard (0)
    (7) Bicycle (0)
    (8) REF [TERMINATE]

16. In the past year have you used Intercity Transit buses, once a month or more, just a few times or never?
    (1) Once a month or more **[THIS IS A "RIDER." AUTO-CODE Q17 as "1=RIDER" AND GO TO Q22]**
    (2) Just a few times/special events **[AUTOCODE Q17 AS 2 OR 3 AS APPROPRIATE AND FOLLOW SKIP]**
    (3) Never **[AUTOCODE Q17 AS 2 OR 3 AS APPROPRIATE AND FOLLOW SKIP]**
    (4) Do not recall **[AUTOCODE Q17 AS 2 OR 3 AS APPROPRIATE AND FOLLOW SKIP]**

17. AUTO-CODE - BUS RIDER / NON-BUS RIDER SPLIT
(1) BUS RIDER [YOU GET HERE IF Q10=5 OR Q15=5 OR Q0=1. NOW GO TO (Q22)

(2) NOT A BUS RIDER – DRIVES A CAR FOR COMMUTING OR USUAL LOCAL TRIP [YOU GET HERE IF (Q10= 1 OR Q10=2) OR [(Q15= 1 OR Q15= 2) AND Q0≠1] NOW CONTINUE WITH Q18)

(3) NOT A BUS RIDER – CAR OR VAN POOLS, WALKS, OR BIKES. [YOU GET HERE IF (Q10=3,4,6, OR 7) OR [(Q15=3,4,6, OR 7) AND Q0≠1] NOW SKIP TO Q20]

SECTION B: POTENTIAL TO USE TRANSIT OR ALTERNATE MODE

18. Thinking about your most frequent current local area trip, whether for commuting or other purposes, are there circumstances in which you could see yourself using another way of getting around instead of driving alone – such as riding the bus, carpooling, vanpooling, riding a bike or walking?
    (1) There are/could be circumstances under which respondent can see herself/himself using one of these options (19)
    (2) No circumstances under which respondent can see herself/himself using an alternative mode **(GO TO Q0, AND CODE AS 3)**
    (3) REF (20)

19. Which of the following means of transportation would you most likely use? [READ RESPONSES]
    (1) The bus (0 AUTO-CODE AS POTENTIAL RIDER, THEN SKIP AS SHOWN)
    (2) Carpool (20)
    (3) Vanpool (20)
    (4) Bike (20)
    (5) Walk (20)

20. Let's say that Intercity Transit local bus service came within a block or two of your home, ran frequently, and ran directly to within a block or two of where you need to go anywhere in Olympia, Lacey, Tumwater or Yelm. Thinking realistically, how likely would you be to use an Intercity Transit Bus once a month or more -- very likely, somewhat likely, not very likely, or definitely would not?
    (1) Definitely would **(POTENTIAL RIDER)** (0 THEN SKIP AS SHOWN)
    (2) Very likely **(POTENTIAL RIDER)** (0 THEN SKIP AS SHOWN)
    (3) Somewhat likely **(POTENTIAL RIDER)** (0 THEN SKIP AS SHOWN)
    (4) Not very likely (0 THEN 22)
    (5) Definitely would not (0 THEN 22)
    (6) Couldn't -- need car at work (0 THEN 22)
    (7) Couldn't -- other problem would prevent it (0 THEN 22)
    (8) Not sure (0 THEN 22)
    (9) REF **[TERMINATE]**

21. AUTO-CODE:

(1) IF Q17=1, "RIDER," i.e., CURRENT TRANSIT USER (NOW GO TO Q22)

(2) IF 19=1 OR Q20=1 OR 2 OR 3, POTENTIAL TRANSIT USER. THIS COUNTS TOWARD THE QUOTA OF 400. (CONTINUE WITH Q22)

(3) ALL OTHERS – THIS IS THE DEFAULT – NON-RIDER AND NON-POTENTIAL TRANSIT USER (CONTINUE WITH Q22)

SECTION C: AWARENESS / COGNITIVE ELEMENTS TO BE ASKED OF ALL

22. Many people are not aware of the transit services available, while others are quite aware. I'd like to read you a few services the area's bus system provides and ask if you were aware of them before I read them to you. First, Intercity Transit provides regular bus service between Olympia, Lacey, Tumwater, and Yelm ….... Were you familiar with that service previously, or had you only heard of it, or were you not aware of it at all?
    (1) Familiar
    (2) Had only heard of it
    (3) No, was not aware
    (4) Not sure

23. Intercity Transit also provides service into Tacoma and Lakewood in Pierce County. Were you familiar with those services previously, or had you only heard of it, or were you not aware of it at all?
    (1) Familiar
    (2) Had only heard of it
    (3) No, was not aware
    (4) Not sure

24. Intercity Transit provides a Dial-a-Lift service that provides door-to-door transportation for qualified seniors and persons with disabilities who cannot take the regular buses. Were you familiar with that service previously, or had you only heard of it, or were you not aware of it at all?
    (1) Familiar
    (2) Had only heard of it
    (3) No, was not aware
    (4) Not sure

25. Intercity Transit also organizes vanpools for commuters. Intercity Transit provides a van to groups of five to twelve commuters who drive it themselves and are responsible for the cost of operating it. Were you familiar with that service previously, or had you only heard of it, or were you not aware of it at all?
    (1) Familiar
    (2) Had only heard of it
    (3) No, was not aware
    (4) Not sure

AFTER Q25, IF Q9=1, GO TO Q26. GO TO Q29 IF Q9=2.

SECTION D: LOCAL TRAVEL

26. **[COMMUTER: I.E., Q9=1]** Do you generally commute to a location inside or outside of Thurston County?
    (1) Inside (27)
    (2) Outside (28)
    (3) REF (continue)

27. To what city in Thurston County do you commute for work or school?
    (1) Olympia (30)
    (2) Lacey (30)
    (3) Yelm (30)
    (4) Tumwater (30)
    (5) Other (30)
    (6) REF (30)

28. To what city or county outside of Thurston County do you commute for work or school?
    (1) Tacoma (30)
    (2) Lakewood (30)
    (3) Seattle/King County/further north (30)
    (4) Lewis/Mason/Greys Harbor Counties (30)
    (5) Other (30)
    (6) REF (30)

29. **[NON-COMMUTERS I.E., Q9=2]** Thinking about the local trip you take more often than any other local trip, is your destination in one of the following? [READ RESPONSES]
    (1) Olympia
    (2) Lacey
    (3) Yelm
    (4) Tumwater
    (5) Tacoma
    (6) Lakewood
    (7) Seattle/King County
    (8) Lewis/Mason/Grays Harbor Counties
    (9) Other
    (10) REF

30. Intercity Transit, receives tax support from local and national sources as well as having revenue from fares. How good a job do you believe Intercity Transit does with using that tax money? **[READ RESPONSES]**
    (1) Excellent
    (2) Very good
    (3) Neither good nor poor
    (4) Poor
    (5) Very poor
    (VOL) Not sure

31. How important is each of the following reasons for providing public support for the local transit system in the greater Olympia area.

[READ RESPONSES]	Extremely important	Very important	Not very important	Not important at all
1. Provide transportation for older adults	1	2	3	4
2. Protect the environment	1	2	3	4
3. Get people to work who do not drive	1	2	3	4
4. Providing transportation for those who cannot afford a car	1	2	3	4

32. Overall, how well would you say Intercity Transit is doing in providing these kinds of services? It is doing …
[READ RESPONSES]
(1) Extremely well
(2) very well
(3) not very well
(4) poorly
(5) (VOL) Not sure

SECTION E: SPECIFIC MOTIVATORS

INTRODUCTIONS FOR THE NEXT SERIES FOR QUESTIONS

[RIDERS (I.E., IF Q0=1) SKIP TO Q37]

[IF Q0=2, THIS IS INTRO FOR POTENTIAL RIDERS:] Intercity Transit is working to improve bus services. I would like to know very realistically, whether these improvements would make you decide **definitely** to use Intercity Transit buses, **very likely** to use the Intercity Transit buses, **a little more likely,** or if it would **make no difference** in whether you use Intercity Transit buses?

[IF Q0=3 DEFINITE NON-RIDERS, USE THIS INTRO:] Even though you are very unlikely to use Intercity Transit buses, I'd like to know how appealing certain service improvements would be to you if you ever considered using the bus. I would like to know very realistically, whether these improvements would make you decide **definitely** to use the Intercity Transit buses, **very likely** to use Intercity Transit buses, **a little more likely**, or if it would **make no difference** in whether you use Intercity Transit buses?

ROTATE ORDER OF Q33 TO Q36	Definitely would use	Very likely to use	A little more likely to use	Would make no difference	Not sure
33. Local Service that begins before 5 in the morning on weekdays.	1	2	3	4	5
34. Local Service that runs later than 9 at night on weekends.	1	2	3	4	5
35. Local service that runs more frequently than every 30 minutes	1	2	3	4	5
36. Express Service between Olympia and Tacoma every thirty minutes all day long on weekdays.	1	2	3	4	5

SECTION F: INFORMATION SOURCES

37. **[SKIP IF THIS RESPONDENT IS FROM CELL SAMPLE]** Do you usually carry a mobile phone?
    (1) Yes (a)
    (2) No (38)
        (a) Is it a conventional cell phone or a smartphone with Internet access?
            (1) Conventional
            (2) Smartphone

38. For local news and information regarding issues and events in Olympia, Lacey and Tumwater, do you … [READ RESPONSES]

(a)	Use social media online	1. Yes	2. No
(b)	Do you use other news sources online	1. Yes	2. No
(c)	Do you listen to local radio stations	1. Yes	2. No
(d)	Do you read the online version of the local newspaper, the Olympian	1. Yes	2. No
(e)	Do you read the printed version of the local newspaper, the Olympian	1. Yes	2. No
(f)	Do you follow to the local online discussion program called "Thurston Talk?"	1. Yes	2. No

(g) Do you have any other source of local news?:
    (1) Specify: _____

39. [ASK IF Q38a=1. OTHERWISE SKIP TO Q40 or Q41, AS APPROPRIATE] Which social media do you use to check posts on local events and issues?

(a)	Facebook	1. Yes	2. No
(b)	Twitter	1. Yes	2. No
(c)	Other: _____		

40. [ASK IF Q38c=1. OTHERWISE CONTINUE TO NEXT APPROPRIATE QUESTION] Which Olympia area radio station do you listen to most often? [READ LIST EXCEPT VOL]
    (1) (VOL) None – do not listen to local radio stations OR Do not listen to radio
    (2) Mix 96 KXXO radio
    (3) 94.5 Roxy KRXY Radio
    (4) 89.3 KAOS Community Radio
    (5) KGY 95.3 Radio
    (6) KPLU (NPR/Public Radio)
    (7) Another local radio station _____
    (8) [VOL – accept only after probe] All equal

41. **[ASK ALL RESPONDENTS]** Have you visited the Intercity Transit Facebook page?
    (1) Yes
    (2) No

42. **[ASK ALL RESPONDENTS]** In the past year, have you ever visited the Intercity Transit website?
    (1) Yes
    (2) No

SECTION G: DEMOGRAPHICS

[QUESTIONS Q43 THROUGH Q46 ARE TO BE ASKED ONLY IF Q8=1 OR Q8=2, I.E. THE RESPONDENT IS EMPLOYED]

43. Are you employed by the state of Washington?
    (1) Yes
    (2) No
    (3) Refused

44. Does your job require you to use your own car during the work day for work purposes and not just for commuting and personal errands?
    (1) Yes
    (2) No
    (3) REF

45. Is there any other reason you would need a car at work such as having to drop children off at day care or school, or having other daily chores that require you to use your own car during the day?
    (1) Yes
    (2) No
    (3) REF

46. Are you required to work regularly on one or both days of the weekend, not at home, but at your job-site?
    (1) Yes
    (2) No
    (3) REF

47. **[ASK ALL RESPONDENTS]** In what year were you born? 19_____
    (9999=Refused)

48. **[ASK ALL RESPONDENTS]** And the final question, which of the following groups does your total annual household income fall into?
    (1) Less than $10,000
    (2) $10,000 to $19,999
    (3) $20,000 to $29,999
    (4) $30,000 to $39,999
    (5) $40,000 to $49,999
    (6) $50,000 to $59,999
    (7) $60,000 to $69,999
    (8) $70,000 to $79,999
    (9) $80,000 to $89,000
    (10) $90,000 to $99,999
    (11) $100,000 or more
    (12) REFUSED

Thank you so much for talking with me today. This information you have provided will really help Intercity Transit make plans for the future.