Market Based Transit Study

Community Telephone and E-Survey Reports

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Butte Council of Governments

Conducted by:

CJI Research Corporation
With Transit Resource Center
And Transit Marketing LLC

Summary Conclusions

From Community Telephone Survey,
E-Survey of Commuters
and B-Line On-board Passenger Survey

Summary Conclusions

Introduction

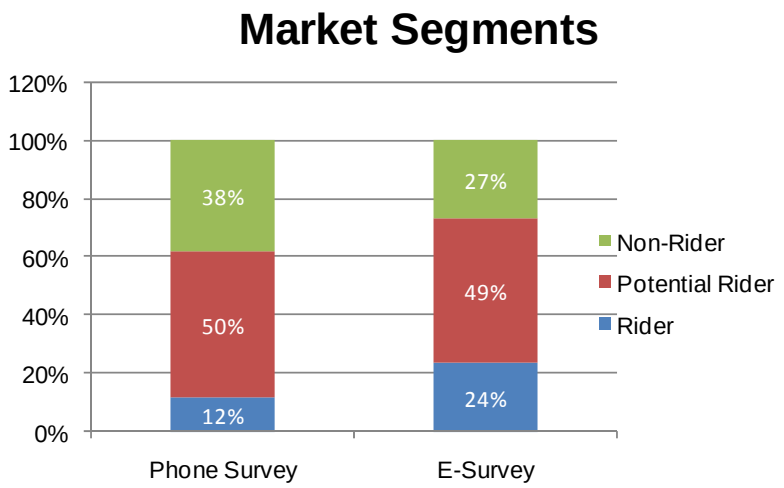
This summary is compiled based on data from three surveys: a random community telephone survey of Butte County residents, a non-random e-survey of Butte County commuters (college students and employees), and a comprehensive survey of B-Line riders. Complete reports for the Telephone and E-Surveys follow in this document. The report for the B-Line passenger survey (conducted in 2008) is available under separate cover.

Market Potential

Butte County's population appears to be surprisingly open to the concept of using public transportation. Both the general population reflected in the phone survey and the commuter population reflected in the e-survey include large segments of potential riders.

Phone Survey

- Twelve percent of residents already use the bus, at least occasionally, and fully half of the population says they would be willing to consider riding if service were convenient.
- Among the potential riders, 63% say they believe using transit would be "convenient" and 87% say they can realistically see themselves using B-Line if service improvements were made.



E-Survey

- Of commuters who responded to the e-survey, 24% currently use B-Line at least once a month, while half (49%) are potential riders open to the idea of using B-Line regularly.
- Commuters captured in the e-survey were somewhat less optimistic about B-Line's convenience than potential riders in the general population. Thirty-nine percent (39%) of the potential riders thought B-Line would be convenient, and 66% thought they would realistically considering using B-Line if major improvements were made.

Even among residents who don't use B-Line regularly, many have relatively recent experience with the transit agency, indicating a true willingness to give it a try.

Phone Survey

- 32% of the population has ridden B-Line since 2005.
- 16% of the population is made up of potential riders who have used B-Line since 2005. Six percent are potential riders who have ridden in the past year.

E-Survey

- 45% of respondents to the e-survey have ridden B-Line since 2005, 35% have ridden in the past year.

Getting potential riders to act on these good intentions and getting infrequent riders to use B-Line regularly will not be simple tasks. However, this data does demonstrate a willingness to consider transit that is not seen in many rural and small urban communities.

Modal Choice and Usage

The majority (about 80%) of both the Butte County population included in the phone survey and of the respondents to the e-survey enjoy full modal choice. This means that if they are to be attracted to transit use it will be because of factors other than lack of a vehicle.

Phone Survey

- Among the general population, 78% have full modal choice, while 14% share a vehicle with other household members. Only 8% lack a vehicle altogether. Among potential riders 80% have vehicles and 12% share.
- The small group of riders found in the phone survey are the only subgroup (from the phone and e-surveys) in which the majority do not have full modal choice. Among riders, 39% have their own vehicle and 35% share a vehicle. One quarter (26%) are fully transit dependent.

E-Survey

- Among e-survey respondents, 80% have full modal choice and 9% share a vehicle. For the potential commute riders who participated in the e-survey, fully modal choice is nearly universal at 88%.
- Even transit users who participated in the e-survey are most likely to have modal choice (53% full and 16% shared use of a vehicle).

On-board Survey

- The passenger survey conducted in 2008 found that 38% of riders had modal choice (both a license and vehicle), a finding very similar to the phone survey.

Despite the high level of modal choice, there is currently a significant minority of the population and of commuters who use alternative modes of transportation to commute to work or school.

Phone Survey

- Among the general population, only two-thirds (66%) drive alone to work or school. Twenty percent carpool, 5% bike, 4% ride the bus, and 4% walk.
- Among potential riders in the general population, 65% currently drive alone, while 25% carpool.

E-Survey

- Among the e-survey respondents, 70% drive alone, while 11% bicycle, 8% carpool, 7% ride the bus and 4% walk.
- Student commuters are much more likely to ride the bus (23%), bike (19%) or walk (13%). Only 33% drive alone.
- Among the potential commute riders, 79% drive along, while 9% bike and 9% carpool.

Local/Regional Travel Patterns

Both the phone and e-surveys found that about 60% of the Butte County commuters travel within a single community.

Phone Survey

- About 59% of the general population live and work within a single community; 35.5% within Chico.

E-Survey

- A similar number, 62% of commuters responding to the e-survey commuting within a city; 55.9% within Chico.

This leaves a significant minority who travel between communities for work, school and other purposes.

Phone Survey

- Forty-nine percent of phone survey respondents travel between Butt County cities at least once a week.
- Twelve percent travel between cities five or more days per week, while 15% make intercity trips 3-4 days per week.

E-Survey

- Forty-two percent of e-survey responds travel between Butte County cities at least once a week.

- Twenty-four percent travel five days per week or more, indicting a large intercity commute segment.

Not surprisingly, those who travel among communities and those who live outside of Chico place a much higher value on regional transit services than do those who stay primarily within a single community.

It is important to note that the potential rider segment identified by the phone survey is somewhat more likely to live outside of Chico (61%) than either the rider or non-rider groups (both 53%). Forty percent of potential riders live in Oroville or Paradise.

High Potential Ridership Targets

B-Line's current ridership is very young and of modest income. It includes significant segment of students and young workers.

 On-board Survey

- More than half (53%) of current B-Line riders are students.
- Half (51%) of riders are 25 years old or younger.
- Thirty-eight percent of riders are employed (16% are employed and students).
- Three-quarters (75%) of riders have annual household incomes of under $25,000.

The potential rider market identified in both the phone and e-survey is a good bit more diverse than the current ridership in terms of both age and income.

 Phone Survey

- Among potential riders, 29% are 19-26, 47% are 27-59 and the remaining 24% are 60 and older.
- About half of potential riders (52%) have incomes of under $35,000, while the other 48% have higher incomes.

 E-Survey

- One quarter of respondents are 18-22 years old, while 49% are 23-51, and the final quarter are 52 years old.
- Thirty-nine percent have incomes of under $35,000, while 61% have higher incomes.

Within this potential rider market, however, is a significant sub-segment that is not too different from B-Line's current ridership. Both surveys found that about a quarter of potential riders are 25 or younger and about a third have incomes of $25,000 or less. It is these young, low to moderate income individuals who offer B-Line the most immediate potential for ridership growth.

Service Preferences

The chart on the following page summarizes the service preferences of the rider and potential rider segments from both the phone and e-surveys. It allows us to easily compare and contrast the preferences of the general population and commuters who participated in the e-survey, riders and potential riders, and residents of Chico and other cities within Butte County.

- **Longer Hours vs. More Days of Service**
  The general population and the commuters differ in their onions regarding the importance of longer service hours versus service seven days a week. The general population within Chico, and even more so outside of Chico, prefer having service every day. On the other hand, commuters – both riders and potential riders, inside and outside of Chico – opt for longer service hours. E-survey participants who are potential riders and live outside of Chico had the strongest opinion on this, with 70% preferring longer hours.

- **More Frequency vs. More Days of Service**
  Again, the general population and the commuters differ in their opinions. The general population would again prefer service seven days a week, while the commuters would prefer more frequent service on weekdays. This split is true both in Chico and in other areas of Butte County, and holds for both riders and potential riders.

- **Longer Hours vs. More Frequency**
  When asked to choose between the two improvements they preferred previously, commuters in the e-survey chose frequency over longer hours. When days of service were taken out of the equation, the general population also chose frequency over longer hours. The one exception was current riders who live in Chico: among that segment 56% chose longer hours.

- **Local vs. Regional Service**
  Residents of Chico and residents of other Butte County communities think quite differently on this issue. Chico residents prefer intensification of service within Chico. This is likely because most of the places they need to travel are within that city. Residents of other communities, particularly commuters in the e-survey, are more interested in regional routes that would connect the communities. This is likely due to need to travel outside smaller communities for work and services. Among B-Line riders who participated in the e-survey and live outside of Chico, 79% prefer more regional service.

- **Direct routes vs. Frequency**
  Potential riders in both surveys preferred direct routes over frequency. Clearly, they do not like the idea of transferring. Current riders, however, preferred frequency. This may be because they are familiar with the timed transfer system and feel that frequency would do more to reduce travel time.

Trade-offs by segment

		E-Survey		Phone Survey	
Chico Respondents		B-Line Rider	Potential rider	B-Line Rider	Potential rider
Q27.	A Local buses in Chico could run weekdays only from 6am to 10pm	63%	59%	43%	40%
	B Local buses in Chico could run seven days a week from 7am to 6pm	38%	41%	57%	60%
Q28.	A Buses in Chico could run every 30 minutes throughout the day on weekdays only	53%	56%	37%	31%
	B Buses in Chico could run every 60 minutes, seven days a week with 30 minute service only during commute hours on weekdays	47%	44%	63%	69%
Q29.	A Buses in Chico could run every 60 minutes from 6am to 10pm	44%	36%	56%	46%
	B Buses in Chico could run every 30 minutes from 7am to 6pm	56%	64%	44%	54%
Q30.	A More routes and more buses operating on local routes within Chico	82%	76%	72%	71%
	B More buses on regional routes connecting Chico with the other communities in Butte county	18%	24%	28%	29%
Q31.	A Bus routes that run every 60 minutes, and get you to your destination without transferring	41%	58%	49%	64%
	B Bus routes that run every 30 minutes but require you to transfer to complete your trip	59%	42%	51%	36%
Respondents from areas other than Chico					
Q33.	A Local buses could run weekdays only from 6am to 10pm	57%	70%	35%	37%
	B Local buses could run seven days a week from 7am to 6pm	43%	30%	65%	63%
Q34.	A Buses could run every 60 minutes throughout the day on weekdays only	58%	61%	41%	44%
	B Buses could run every two hours, seven days a week, with 60 minute service only during commute hours on weekdays	42%	39%	59%	56%
Q35.	A Buses could run every two hours from 6 am to 10 pm	47%	38%	33%	41%
	B Buses could run every 60 minutes form 7 am to 6 pm	53%	62%	67%	59%
Q36.	A More routes and buses operating on local routes within your community	21%	32%	47%	47%
	B More buses on regional routes connecting your community with the other communities in Butte County	79%	68%	53%	53%
Q37.	A Bus routes that run every 90 minutes, and get you to your destination without transferring	42%	59%	43%	65%
	B Bus routes that run every 60 minutes but require you to transfer to complete your trip	58%	41%	57%	35%

Community Telephone Survey

Residents within B-Line Service Area

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Introduction

Methods

In April and early May, 2009, a telephone survey of adult respondents in six hundred households was conducted in the B-Line service area. The sample was selected by a random-digit-dial method using the Genesys Sampling System$^{tm.}$ This method assures accurate random representation of all working telephone numbers within a fixed geographic area, including numbers that are not published and numbers that are too recently installed to appear in standard listings.

A quota of 300 potential riders was established to assure sufficient coverage of that market segment. The quota proved unnecessary because the percent of potential riders in the local population is sufficiently high (50%) that the there was no need to seek them out to fill the artificial quota.

To correct for overrepresentation of women and older persons, the sample was weighted to population norms of age and gender established by the American Community Survey (ACS) conducted by the Bureau of the Census. If similar studies are conducted in the future, they should be weighted to the then current population norms so that they would be most comparable.

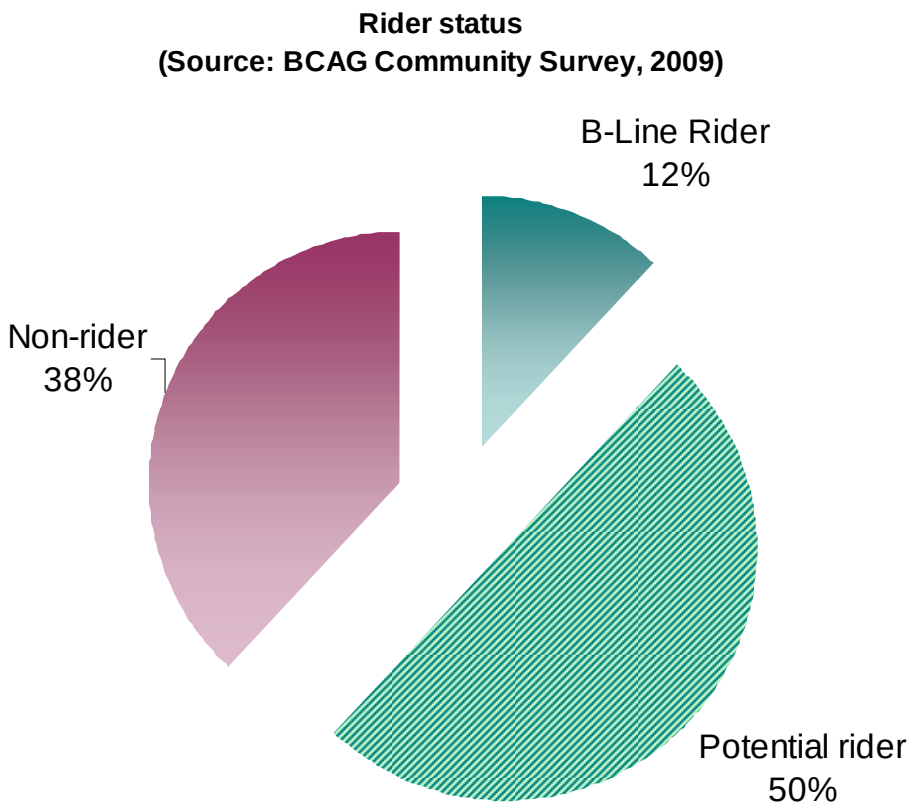
A random sample of this types provides a representative picture of the target population – residents who live within Butte County and B-Line's service area. The findings can be projected to the general population with allowance for sample error.

The accuracy of the sampling is constrained by the statistical principles relating sample size to the range of accuracy. A sample size of 600 has a sample error variation of $\pm$4% at the 95% level of confidence. This means that one can be 95% confident that the percentages shown are accurate within $\pm$4% when the sample is divided roughly 50:50 in terms of response, as it would approximately be (for example) with gender.

Analysis utilized the Statistical Program for the Social Sciences (SPSS) and Excel. Charts were created in Excel and exported into this report. The charts cannot be edited within this document, but they can be copied into PowerPoint from an electronic copy of this report if desired.

Local Transit Awareness and Use Profile

Figure 1 Transit market segments



Transit market segments

The transit market among the general adult public of Butte County includes three major components:

- "Current B-Line riders" (12%)
- "Potential riders" (who currently do not ride) but who are open to the idea of using public transit (50%)
- "Staunch non-riders" (abbreviated the in the charts as "non-riders.") who say they will not use public transit (38%).

The prevalence of ridership is measured by the frequency in the adult population of using public transportation at least once a month. In the B-Line service area, 12% can be considered riders by that definition.

Potential riders, defined as those willing to at least consider using transit[1], constitute 50% of the adult public, while the balance, 38%, can be considered staunch non-riders because they will not consider using public transit.

In the remainder of this report, most charts will be broken down into the

[1] For wording, see questions 3, 7 and 11 in survey questionnaire, Appendix A.

market segments shown in Figure 1. In each chart, the three segments appear, and the total sample, including all three segments, will appear at the far right. (See example in Figure 6, page 13.

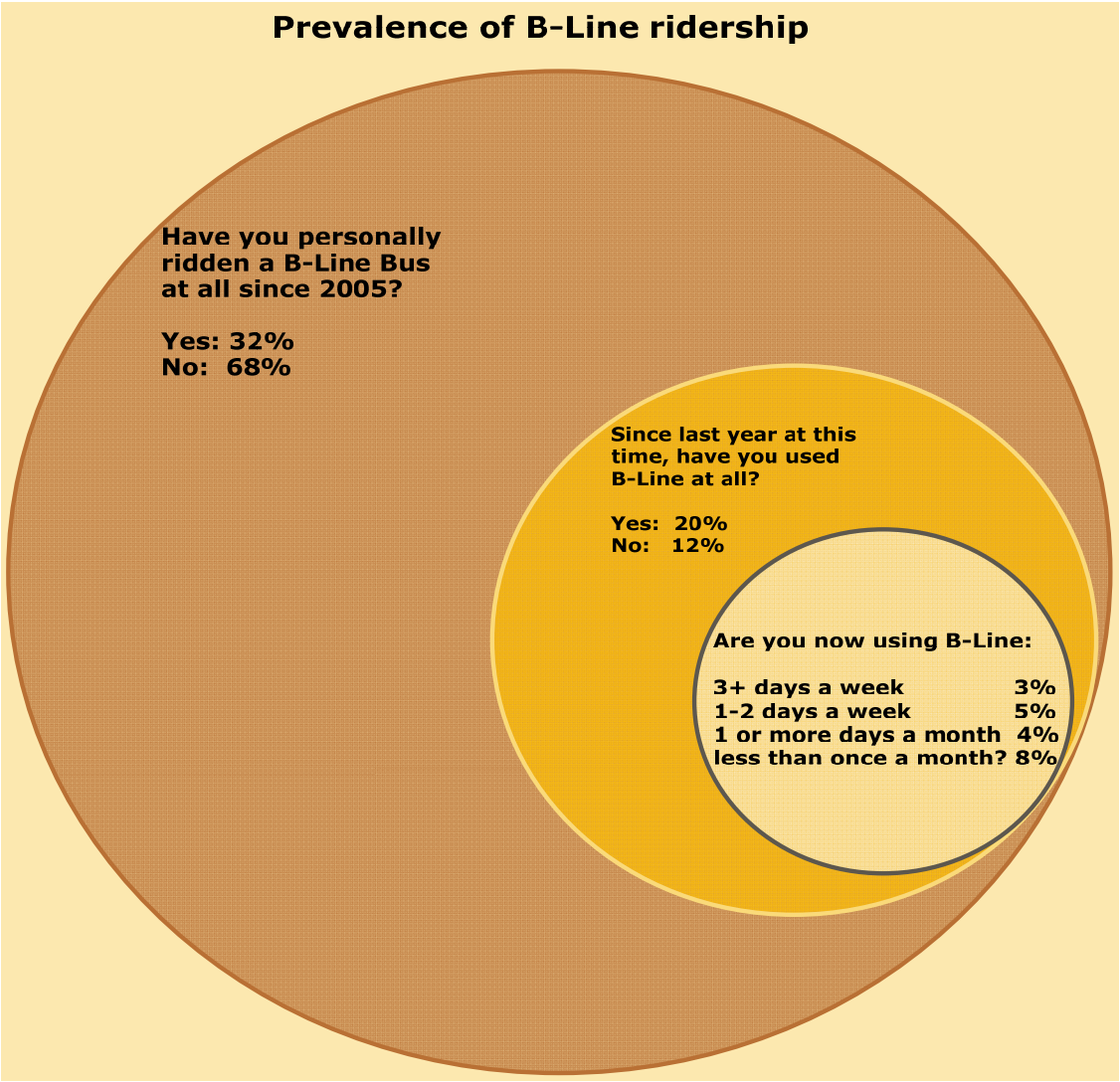
Please note: The rider sample segment is included in the charts, but it will be discussed very little in the text because it includes only fifty-nine responses. It is much too small to provide a reliable guide to rider characteristics in general. For that one needs to refer to the Transit Marketing and CJI Research onboard survey of 2007.

Although they are not definitive, and are only suggestive, the rider statistics are included in the charts in this report for two reasons. First, riders cannot reasonably be combined with either of the other two segments for their experiences are quite different. Second, including the rider statistics does provide a glimpse of riders in the general community, as long as its results are taken as suggestive and not literal.

The results for riders in the telephone survey will differ from the results from the onboard survey not only because of sample size, but because riders found on the buses will tend to be frequent riders (greater frequency means a greater probability that a person will be intercepted and surveyed). Those riders reached by telephone will be reached regardless of the frequency with which they use the buses. Thus the small sample of riders included here will include a higher proportion of occasional users than the onboard survey, and the results will inevitably differ from the onboard results

Throughout the report, percentages are rounded to the nearest whole number (or in one table, the nearest tenth). Rounding results in the sum of some sets of percentages equaling 99% or 101%. This is not an error and should be ignored.

Figure 2 Venn diagram of prevalence of current and recent ridership



Prevalence of current and recent ridership

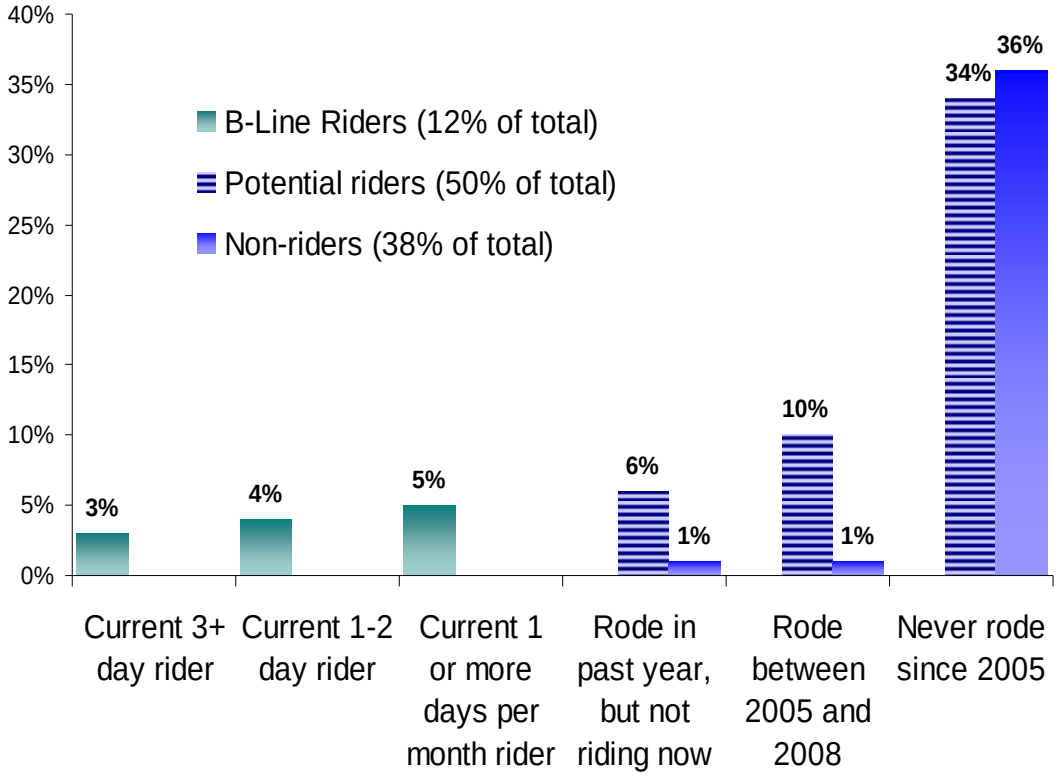
Respondents were asked a series of three questions to determine their use of B-Line. Had they used it since 2005? If so, had they used it since last year at this time? If so, how often were they currently using B-Line? The Venn diagram (not to scale) represents the relationships of the groupings.

Notice that 32% of all respondents said they had used B-Line at some time since 2005. Of these, 20% said they had used B-Line in the past year, while the balance (12%) had used it since 2005, but prior to 2008.

A total of 12% currently use B-Line once a month or more, including 3% who use it three or more days a week, 5% who use it one or two days a week, and 4% who use it only a few times a month.

Figure 3 History of using B-Line since 2005, by market segment

(Source: BCAG Telephone Survey, 2009)

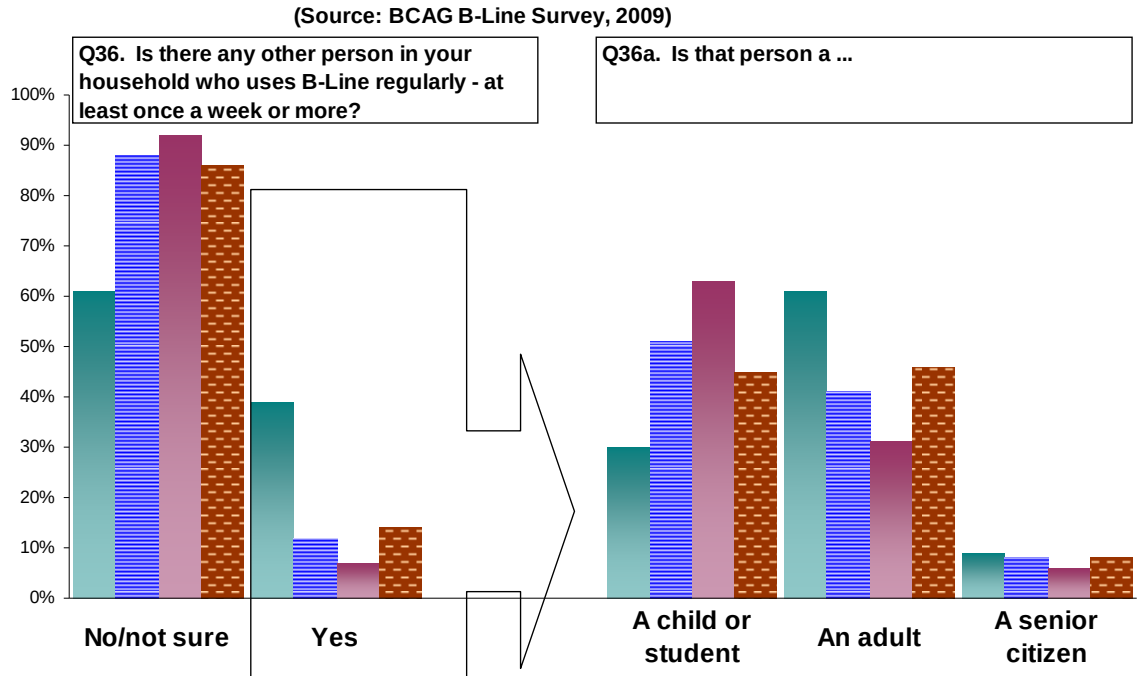


Use of B-Line since 2005, by market segment

The B-Line use history of all three market segments is shown in the chart. The chart represents percentages of all respondents and thus the sum of all percentages in the chart is 100%.

- Riders: Current B-Line riders total 12% and vary in frequency of using B-Line.
- Potential riders total 50%, and most have not used B-Line since 2005. However, 6% of the total adult population are currently potential riders who have used B-Line in the past year, though they are not using it now. Another 10% of the population is potential riders who rode at some time between 2005 and 2008, but no longer do so. Finally 34% of the population consists of potential riders with no recent experience with B-Line at all.
- Non-riders total 38% of the population and for the most part (36%) have no recent experience with B-Line at all. One percent (1%) of the non-riders used B-Line at some time in the past year, though not currently, and 1% rode at some time between 2005 and 2008.

Figure 4 B-Line use by other member of the household



	No/not sure	Yes	A child or student	An adult	A senior citizen
B-Line Rider	61%	39%	30%	61%	9%
Potential rider	88%	12%	51%	41%	8%
Non-rider	92%	7%	63%	31%	6%
All Respondents	86%	14%	45%	46%	8%

Transit characteristics of the total household

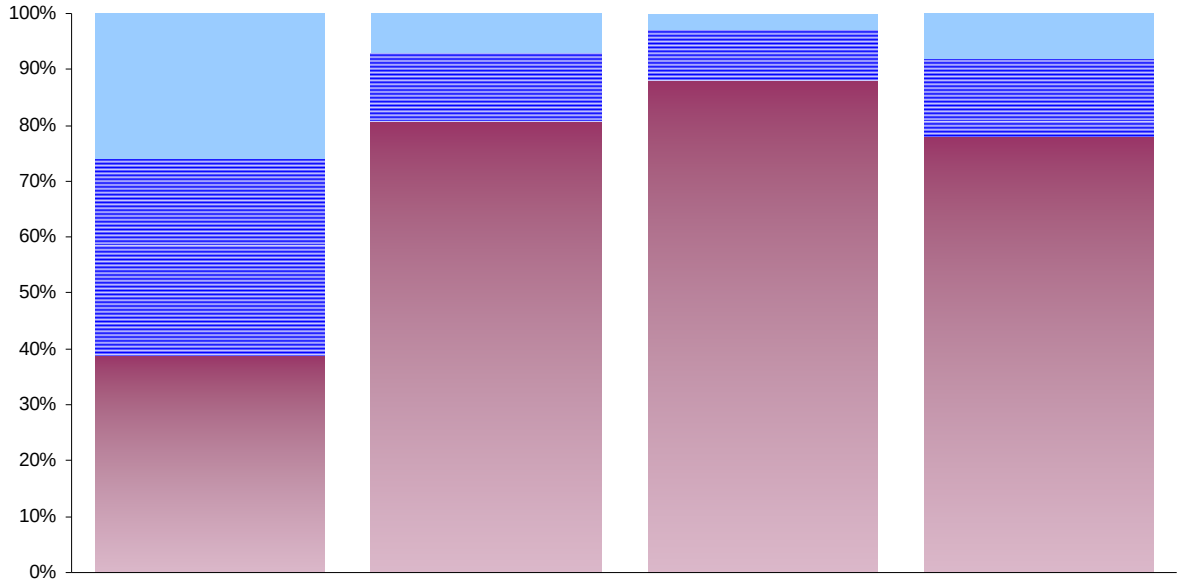
Respondents were asked if there were any other person in the household who uses B-Line.

- Potential riders are more likely (12%) than non-riders (7%) to have a person in the household who uses B-Line at least once a month.
- Current B-Line riders are more likely than the other segments (39%) to have another rider in the household.
- Another rider in the household, if there is one, is equally likely to be a child (46%) or student or an adult (45%), and only occasionally is a senior citizen (8%).

In total, it appears that at least 20% of households include one or more transit users.

Figure 5 Modal choice

Q35. Do you always have a vehicle available for your own use, or do you share a vehicle, or do you not have a vehicle?
(Source: BCAG Telephone Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
No vehicle	26%	7%	3%	8%
Share	35%	12%	9%	14%
Own	39%	80%	88%	78%

Modal choice

We have already shown that 12% of the adult public uses B-Line on a regular basis. Thus the balance of the population (88%) uses other modes.

- Of all area adults, 78% own (or lease) a vehicle and do not have to share it.
- Another 14% share a vehicle with another person in the household.
- Finally, 8% lack a vehicle, rendering them transit-dependent.

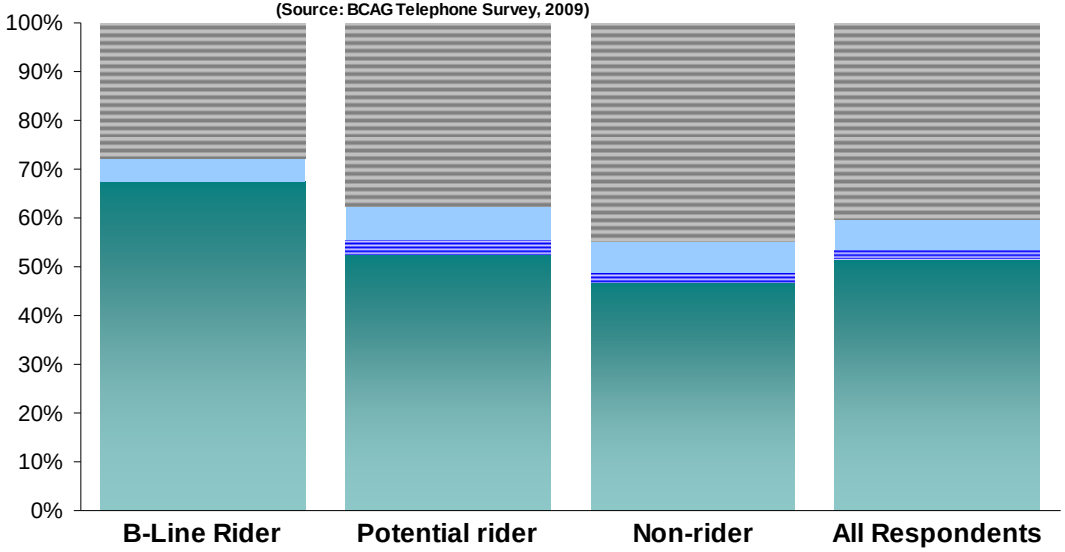
As one would expect, potential riders (80%) are less likely than non-riders (88%) to have their own vehicles, and more likely (19%) than non-riders (12%) to share a vehicle or have no vehicle. These differences are not stark, however.

More than a quarter of riders say they have no vehicle, while only 39% have sole use of a vehicle.

Figure 6 Name awareness of B-Line

Q2. Do you happen to know the name of the agency that provides local bus service in the areas of Chico, Paradise and Oroville?

(Source: BCAG Telephone Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
Not sure	28%	38%	45%	40%
Other name given	5%	7%	6%	6%
The bus company	0%	3%	2%	2%
B-Line	68%	53%	47%	51%

Awareness of the B-Line name

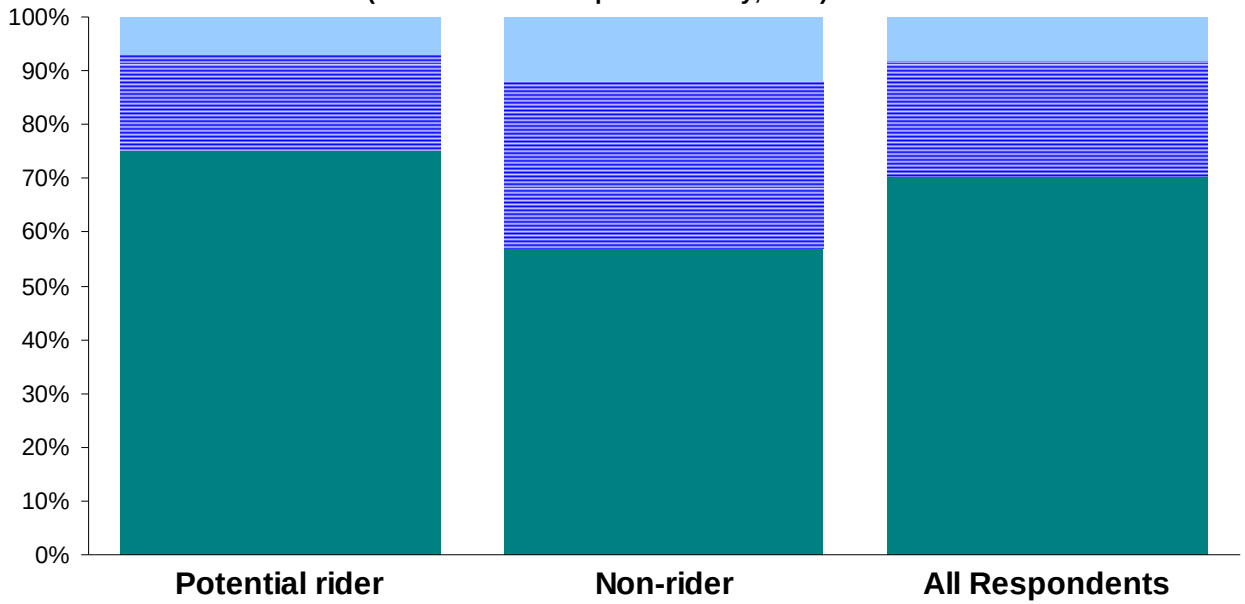
Half of all respondents (51%) are aware of the B-Line brand name. However, 40% are not sure, and 8% provided an incorrect answer.

- Of potential riders, only 53% are aware of the name, 38% are not sure, and 10% gave various answers other than B-Line. Knowing the name helps at least reduce attitudinal barriers to ridership. Thus it would aid B-Line to improve recognition.
- Oddly, 28% of the small rider sample (n=59) said they did not know the name of the bus service provider.
- Non-riders, as one would expect, have the lowest recognition rate (47%).

Figure 7 Awareness of B-Line stop

Q32. Do you happen to know where the bus stop nearest to your home is located?

(Source: BCAG Telephone Survey, 2009)



	Potential rider	Non-rider	All Respondents
Not sure	7%	12%	8%
No	18%	31%	22%
Yes	75%	57%	71%

Awareness of the bus stop

Using the bus obviously requires knowing where the bus stop is located and being in reasonable proximity to it.

- Of all respondents (i.e. the total adult population), 71% say they know where the stop is located.
- Potential riders are more likely (75%) than non-riders (57%) to know, but 25% of the potential riders are not sure of the stop location.

Figure 8 Distance to B-Line stop

Q33. Is it in walking distance? (Includes only those who said they know where the stop is located.)

	B-Line Rider	Potential rider	Non-rider	All Respondents
Yes	91%	72%	75%	77%
No	9%	27%	22%	22%
Not sure	0%	0%	3%	1%

Q34. About how many minutes would it take to walk to it? (Includes only those who said they know where the stop is located.)

	B-Line Rider	Potential rider	Non-rider	All Respondents
0 - 5 minutes	61%	38%	51%	46%
6 - 10 minutes	25%	22%	18%	21%
11 - 20 minutes	5%	13%	17%	13%
21 minutes or more	9%	26%	14%	20%
Mean:	10	22	16	18

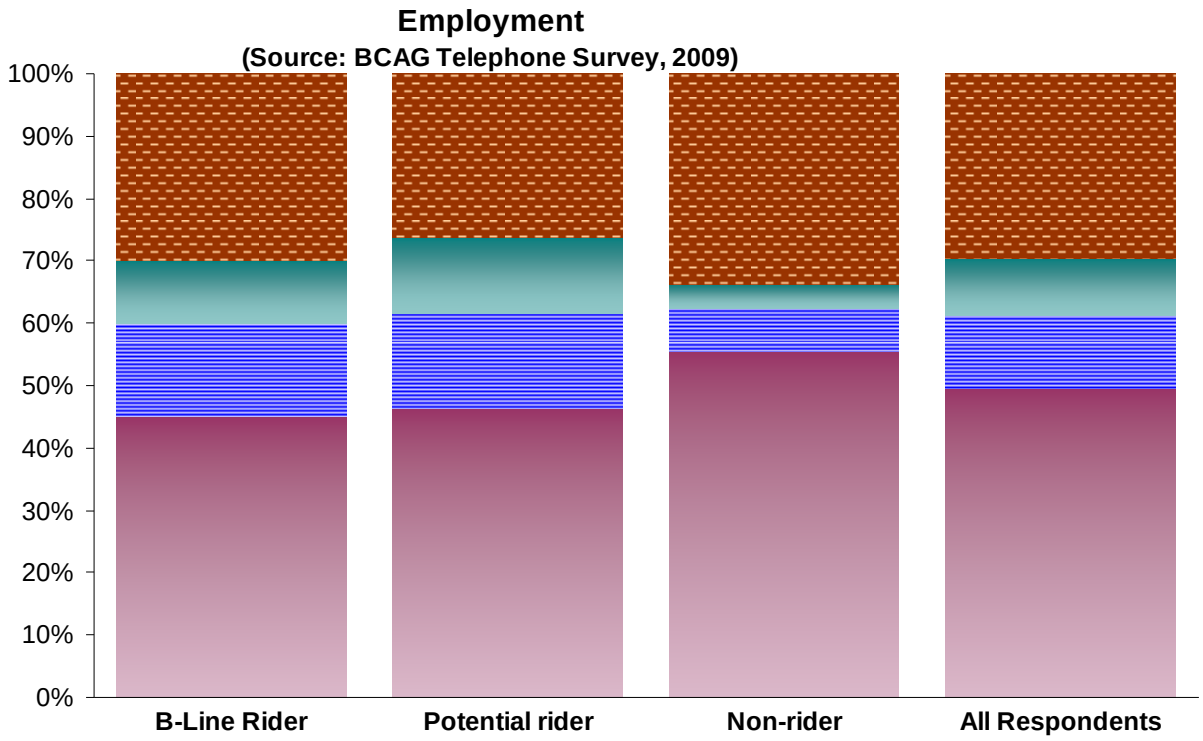
Distance to the B-Line bus stop

Respondents who said they know where the stop is located were asked how many minutes it takes to walk to it.

- Most people, whether potential riders (72%) or non-riders (75%), say the stop is within walking distance. Almost half (46%) say the stop is within a five minute walk, while another 21% say it takes from six to ten minutes to walk to it, for a total of two-thirds (67%) saying the live within a ten minute walk of the nearest bus stop.

Commuting

Figure 9 Employment profile



	B-Line Rider	Potential rider	Non-rider	All Respondents
Employed	30%	26%	34%	30%
Employed and student	10%	12%	4%	9%
Student only	15%	15%	7%	12%
Not employed	45%	46%	56%	50%

Employment of the market segments

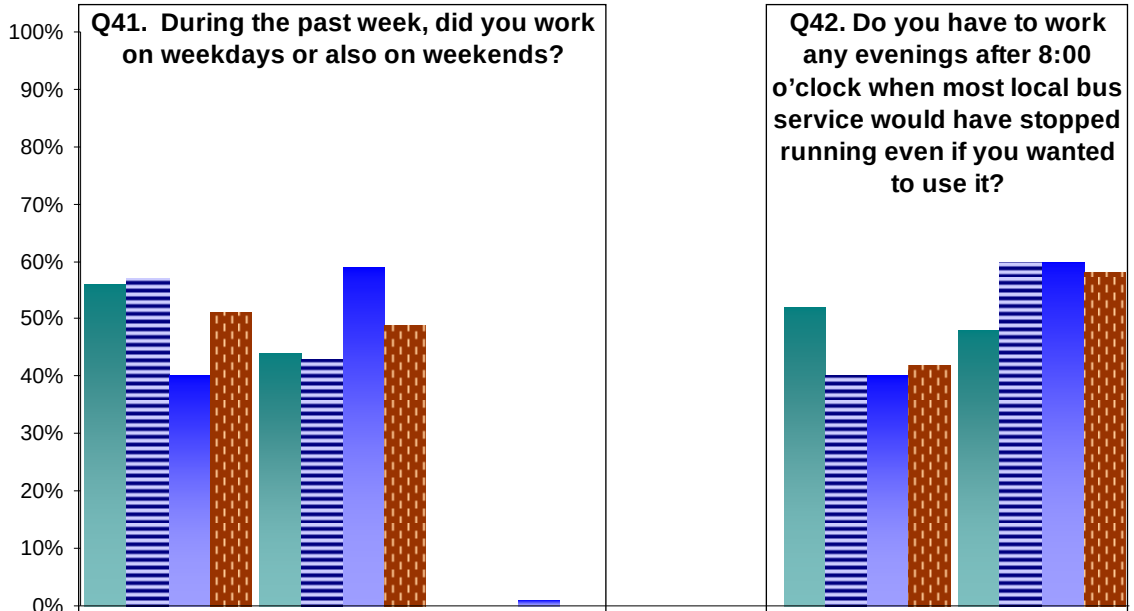
Commuting produces the largest single source of regular transit trips on an ongoing basis. For this reason it is important to know how the segments differ in terms of the extent of commuting.

- Of all respondents, 39% are employed, including 9% who are employed while attending school.
- Another 12% are students only.
- Thus 51% or the sample commutes for work or school.

- Potential riders and non-riders differ significantly in this respect. Of potential riders, 26% are employed, but 12% are students who are also employed, and another 15% are students only, for a total of 53% commuters.
- The total for non-riders is 45%, including more employed persons (34%) but fewer students (11%) than among potential riders.

Figure 10 Employment profile in detail

(Source: BCAG Telephone Survey, 2009)



	Both	Only weekdays	Only weekends	Have to work after 8 PM	Do not have to work after 8 PM
B-Line Rider	56%	44%	0%	52%	48%
Potential rider	57%	43%	0%	40%	60%
Non-rider	40%	59%	1%	40%	60%
All Respondents	51%	49%	0%	42%	58%

Employment profile in detail

Employed respondents were asked whether they had to work weekends and late evenings.

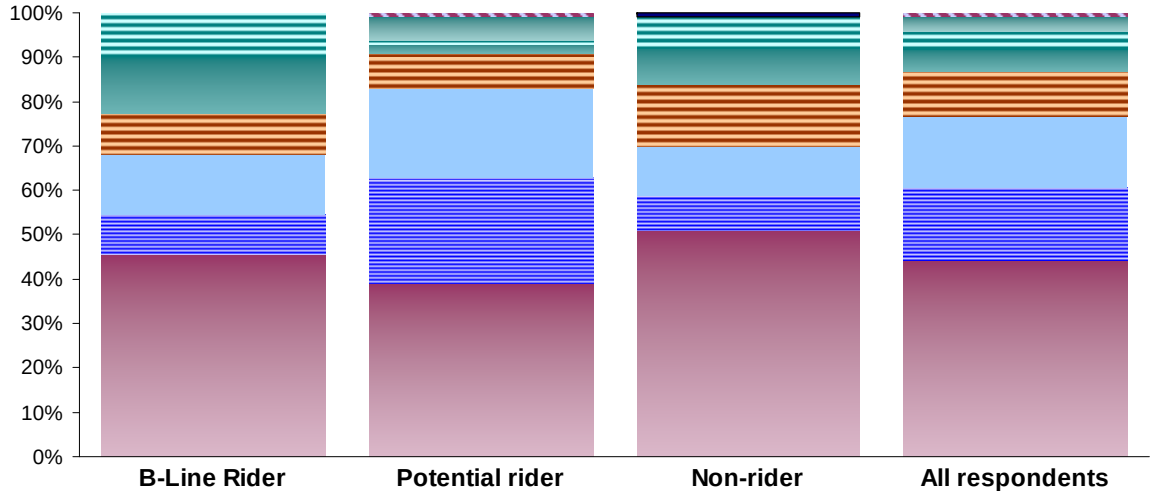
Among all employed persons, 51% say they have to work both weekdays and weekends. This is more characteristic of the potential riders (57%) and riders (56%) than of the non-riders.

Many employed persons say they sometimes also must work into the evening after normal bus service ceases. This is true of 42% of all respondents, and 40% of both the potential riders and non-riders, as well as 52% of the current riders.

The fact that so many potential riders and others must work evenings is interesting. This does not mean they must always work late, but that they sometimes do. It is also interesting that the B-Line riders appear to have late hours more often than others (52% for B-Line riders v 42% for all respondents). However, we must keep in mind that the sample of riders is very small, and many occasional riders in it, and may not be a reliable guide to real frequencies among regular riders.

Figure 11 Location of workplaces

Q10. Is your workplace or school located in Chico, Paradise or Oroville, or is it in a city or town other than those?
(Source: BCAG Telephone Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All respondents
Biggs	0%	0%	1%	0%
Sacramento	0%	1%	0%	1%
Gridley	0%	5%	0%	3%
Magalia	10%	1%	7%	4%
Butte College Main Campus	13%	2%	8%	5%
In another city or town	9%	8%	14%	10%
Paradise	14%	20%	11%	16%
Oroville	9%	24%	8%	16%
Chico	46%	39%	51%	44%

employed potential riders work in Chico, compared to 51% of non-riders and 46% of riders.

- Of the potential riders, 24% say they work in Oroville and another 20% work in Paradise.

Employment locations

Employed respondents were asked where their workplace was located.

- More of the employed persons are employed in Chico (44%) than elsewhere.
- Oroville and Paradise are each the commute destination for 16% of respondents. Five percent (5%) are employed at the Butte College Main campus (5%) which is located in between the three communities.

The potential riders are less likely to work in Chico than the other groups.

- Only 39% of

Figure 12 Basic origin-destination commuting patterns

Basic commuting patterns for those who are employed or students

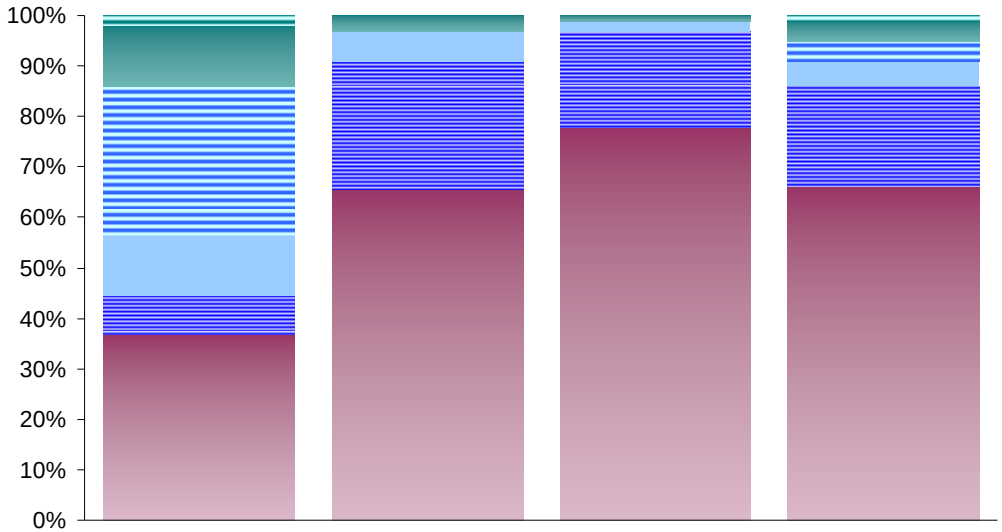
	City of residence						
City of work or school	Chico	Paradise	Oroville	Magalia	city or town	Gridley	Biggs
Chico	35.5%	3.1%	0.5%	1.8%	2.2%	0.8%	0.0%
Oroville	1.0%	1.9%	9.0%	3.7%	0.8%	0.0%	0.0%
Paradise	0.7%	11.8%	1.7%	1.8%	0.2%	0.0%	0.0%
In another city or town	4.5%	0.5%	2.4%	0.2%	1.9%	0.2%	0.3%
Butte College Main Campus	0.6%	3.2%	1.3%	0.0%	0.0%	0.0%	0.0%
Magalia	2.7%	1.5%	0.0%	0.3%	0.0%	0.0%	0.0%
Gridley	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%
Sacramento	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Biggs	0.3%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%

Basic origin-destination commuting patterns

The table of origin and destination for commuters does not require much comment for it simply demonstrates the percentage of all commuters who travel between each pair of cities listed. The percentages are "table percentages," meaning that the denominator consists of all commuters. That is, the percentages sum to 100% through the entire table, not for each column. Thus, for example, we can see that 35.5% of all commute trips are within the city of Chico.

Figure 13 Primary mode of commuting to work or to school

(Source: BCAG Telephone Survey, 2009)



Q7. In the past twelve months have you most often commuted to work (school) by driving alone all the way, carpooling with others, using public transit all or part of the way, or by another means of transportation?

	B-Line Rider	Potential rider	Non-rider	Total, 2009
Telecommute	2%	0%	0%	1%
Walking	12%	3%	1%	4%
Public transit	30%	0%	0%	4%
Bicycle	12%	6%	2%	5%
Car pooling (or van pooling)	8%	25%	19%	20%
Driving alone all the way	37%	65%	77%	66%

Primary mode of commuting to work or school

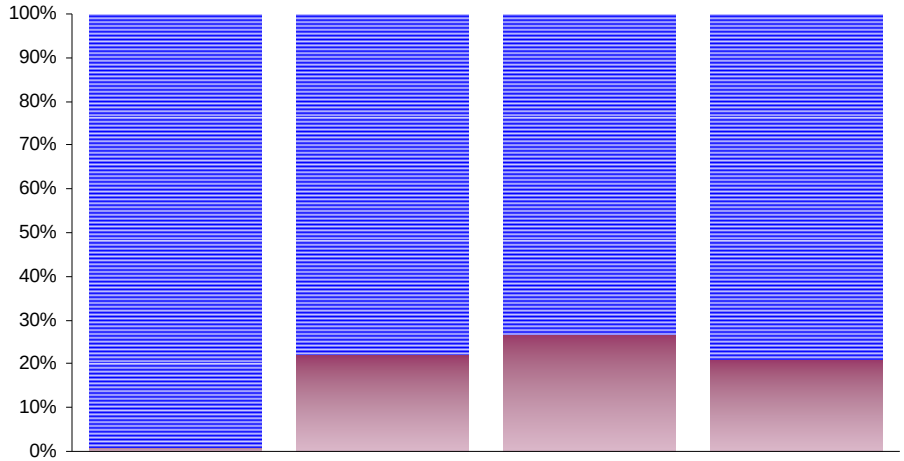
How do commuters normally get to work or school? The chart shows their primary modes.

- As one would expect, the dominant mode (66%) is the single occupant vehicle.
- This tendency varies considerably among the segments, with non-riders being more likely than others to drive alone (77%).
- Potential riders are somewhat more likely than others to carpool, 25%, compared to 19% for non-riders.
- Although they use B-Line often enough to be considered “riders,” 37% of the riders typically drive alone to work or school.
- It is also interesting that 5% of all commuters say they commute by bicycle. Among current riders, bicycling and walking appear to be quite common modes, with a total of 24%.
- It is also interesting that of the non-riders, 19% indicate they carpool, an indication that they are not wedded to the SOV concept.

Figure 14 Having to drop children off during commute

Q38. As part of your daily routine, do you have to drop kids off at child care or school?

(Source: BCAG Telephone Survey, 2009)



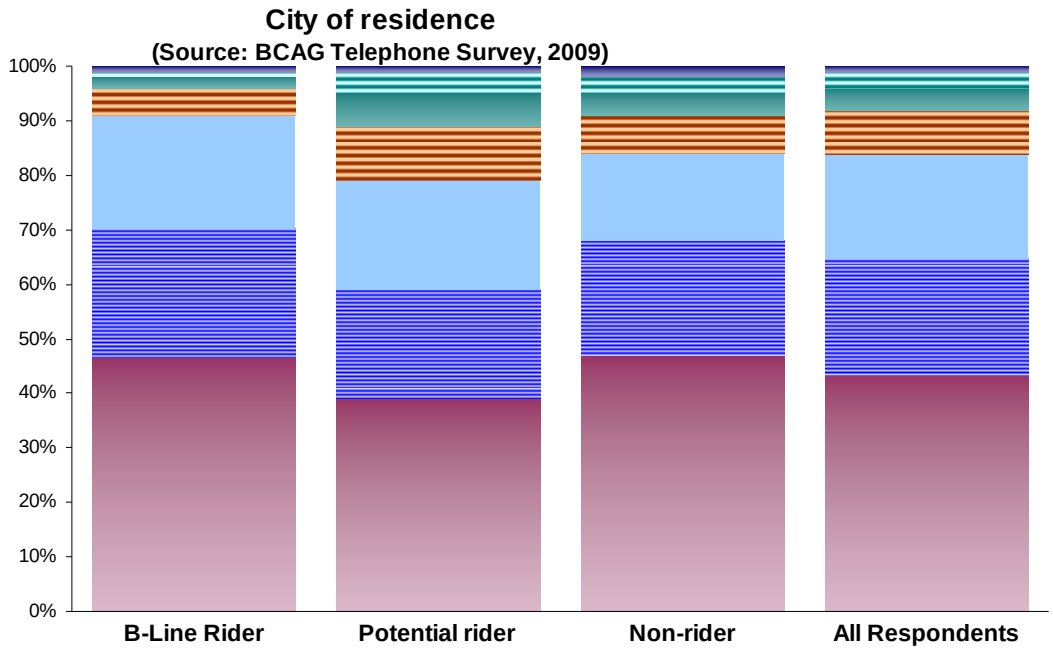
	B-Line Rider	Potential rider	Non-rider	All Respondents
Do not need to drop children off	99%	78%	73%	79%
Must drop children off	1%	22%	27%	21%

Having to drop children off during commute

A limiting factor in the use of transit to commute is the need to drop off a rider, usually a child.

- Of all area adults, 21% say they have to drop children off.
- This is less often true of the potential riders (22%) than of non-riders (27%), and it is true of only 1% of the current riders. This is an example of how this factor influences the potential transit market by providing an obstacle to riding the bus.

Figure 15 City of residence



	B-Line Rider	Potential rider	Non-rider	All Respondents
Biggs	1%	1%	2%	1%
Gridley	1%	4%	3%	3%
In another city or town (specify)	2%	6%	4%	4%
Magalia	5%	10%	7%	8%
Oroville	21%	20%	16%	19%
Paradise	24%	20%	21%	21%
Chico	47%	39%	47%	43%

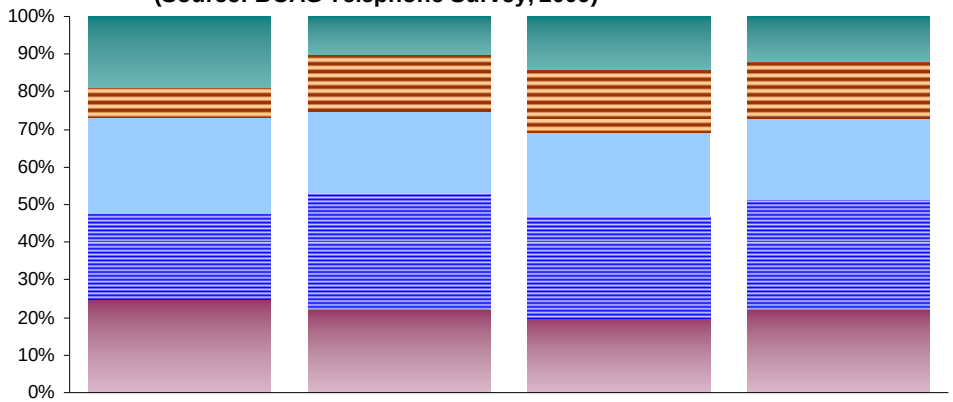
City of residence

In terms of where they reside, potential riders are somewhat more dispersed geographically than either the non-riders or the current riders.

- 39% of potential riders live in Chico. Both riders and non-riders are more likely to live in Chico (47% of each group).
- A total of 40% of potential riders live in Paradise (20%) or Oroville (20%).
- The remaining 21% of potential riders live in the smaller communities of the county.

Figure 16 Travel among Butte County cities

Q15. In the typical week, on how many days, if at all, do you travel from one city to another among Chico, Oroville and Paradise for any reason?
(Source: BCAG Telephone Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
Five or more	19%	10%	14%	12%
Three or four	8%	15%	17%	15%
One or two days	26%	22%	22%	22%
Less than once a week	23%	31%	27%	29%
Never / None at all	25%	22%	20%	22%

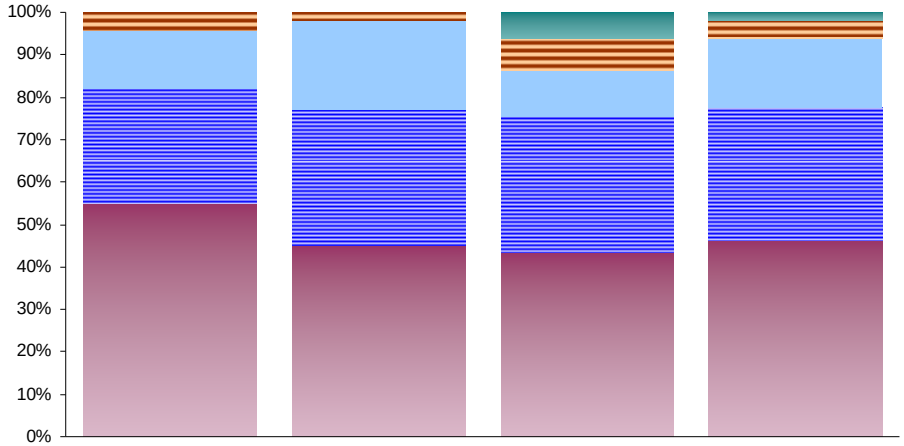
Travel among Butte County cities

Because B-Line operates among several local cities, not only within Chico, it is important to understand how often people travel among these communities.

- While 22% said they do not travel among area cities at all, about half of all respondents (49%) said they do so at least once a week.
- Potential riders are similar to riders and non-riders in their inter-city travel tendencies. For example, 22% of potential riders say they never travel inter-city (in Butte County) compared to 25% of riders and 20% of non-riders.
- The larger difference between potential riders and non-riders is in the frequency of such travel. The non-riders are somewhat more likely to travel inter-city three or more times per week (31%) compared to potential riders (25%). But, again, this is not a truly major difference.

Figure 17 Travel to Sacramento

Q16. In a typical month, on how many days, if at all, do you go to Sacramento?
(Source: BCAG Telephone Survey, 2009)



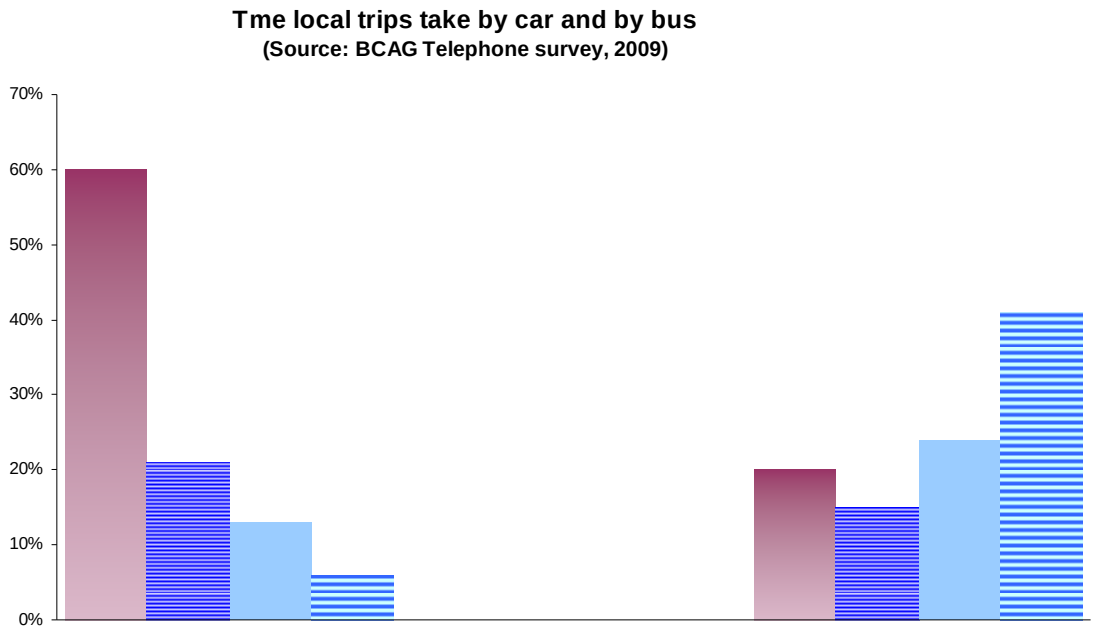
	B-Line Rider	Potential rider	Non-rider	All Respondents
Daily	0%	0%	0%	0%
Five or more days a month	0%	0%	6%	2%
Three or four days a month	4%	2%	8%	4%
One or two days a month	14%	21%	11%	16%
Less than once a month	27%	32%	32%	31%
None at all	55%	45%	44%	46%

Travel to Sacramento

Respondents were also asked how often, if at all, in a typical month they go to Sacramento.

- Most Butte County residents either do not travel to Sacramento at all during the typical month (46%), or they travel there infrequently (31% go there less than once a month).
- Potential riders are somewhat more likely (21%) than non-riders (11%) to go to Sacramento one or two days a month.
- Non-riders are more likely to go there more often than that (14% go three or more days a month).
- Current B-Line riders appear to go to Sacramento less often than others (55% say they do not go at all compared to 46% of the total sample). This is certainly logical, although the sample of riders is small and cannot be assumed to be definitive on this issue.

Figure 18 Time usual trip takes by car or by bus (all respondents)



	By car	By bus
15 min or less	60%	20%
16 - 25 min	21%	15%
26 - 35 min	13%	24%
36 min or more	6%	41%

Time usual trip takes by car or by bus

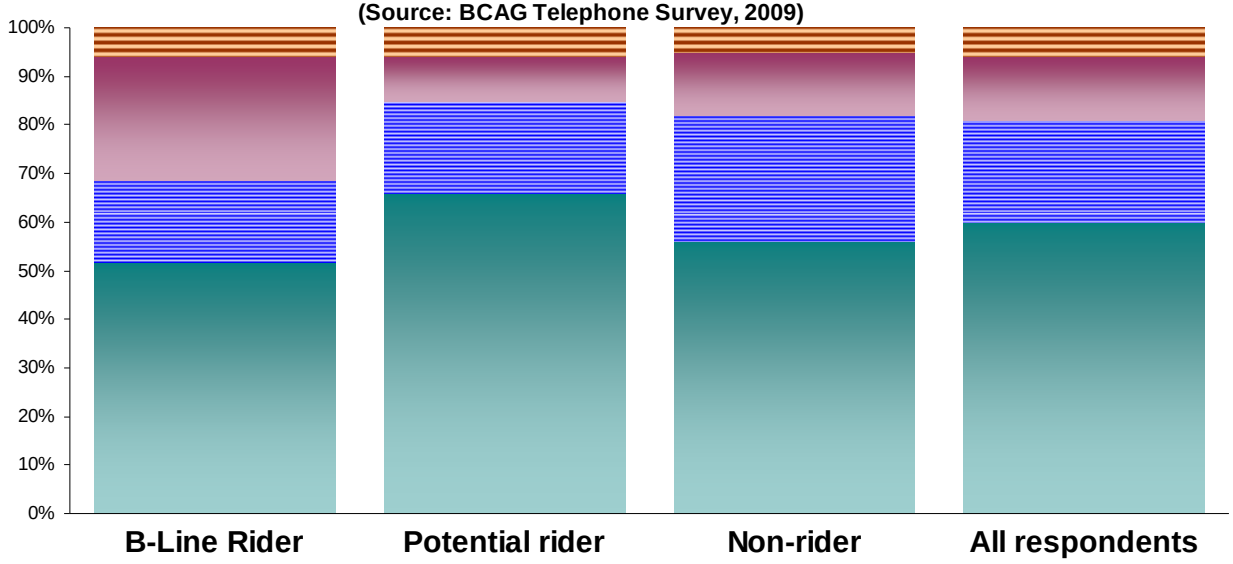
Since travel time is a major modal choice criteria, respondents were asked to estimate the time their usual trip takes by car and how long they believe it would take if they traveled by B-Line.

- Sixty percent (60%) of respondents indicated that their trips by car within the service area take 15 minutes or less.
- Another 21% said that their trips take 16 to 25 minutes for a total of 81% saying their typical local automotive trips take 25 minutes or less.
- While most trips by car are said to be relatively brief, the same trips by B-Line bus are thought to take considerably longer. For example, while only 6% say their trip by car would take 36 minutes or more, 41% say the same trip by bus would take that long.

Figure 19 Time usual trip takes by car (by market segment)

Q13 Consider the local area trip you take more often than any other local trip in the area, whether commuting or other reasons, about how long does it normally take by car?*

(Source: BCAG Telephone Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All respondents
36 min or more	6%	6%	5%	6%
26 - 35 min	25%	9%	13%	13%
16 - 25 min	17%	19%	26%	21%
15 min or less	51%	66%	56%	60%

* Question paraphrased.

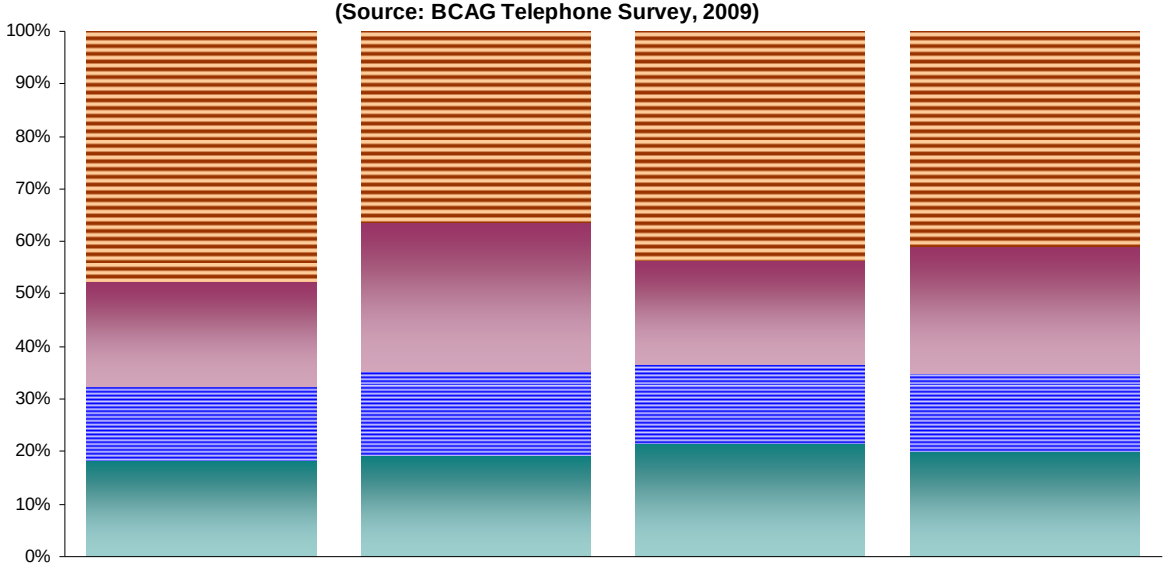
Time usual trip takes by car within each market segment

Does trip duration by private vehicle vary among the market segments?

- The local car trips for 60% of all respondents take 15 minutes or less.
- This tendency toward brief trips is especially strong among potential riders among whom 66% say their usual local trip takes 15 minutes or less.
- Trips this brief can make competing with SOV travel very difficult indeed unless the bus service is very close at hand and very direct.
- On the other hand, 40% of all respondents say their trips take longer than 15 minutes. For potential riders, 19% say their trips take from 16 to 25 minutes, and another 15% say their trips take longer than that.
- The bottom line, however, is that most trips are relatively brief – a fact that is consistent with the patterns shown in Figure 12 which shows many trips being made within the individual cities of the service area, rather than between them.

Figure 20 Time usual trip takes by bus (by market segment)

Q14 If you made that same local trip by B-Line, about how long do you think it would normally take?
(Source: BCAG Telephone Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All respondents
36 min or more	47%	36%	44%	41%
26 - 35 min	20%	28%	20%	24%
16 - 25 min	14%	16%	15%	15%
15 min or less	18%	19%	22%	20%

Time usual trip would take by bus (by market segment)

Respondents were asked how long the same trip would take if they made it by B-Line bus.

- Most respondents assume that the trips would take longer. For example, while only 6% of all respondents had said their trip would take 36 minutes or more by car, 41% felt their trip would take that long by B-Line bus.
- Potential riders are not greatly different from others in terms of their time estimates for bus travel. However, more potential riders (28%) than non-riders (20%) feel their trip by B-Line would take 26-35 minutes and fewer (36% compared to 44% for non-riders) feel it would take longer than that. Apparently then, one reason that some of the potential riders believe that they might become transit users is that they sense that their trips would be not be excessively long.

In the table at the left, we take the same travel-time data and consider it in terms of the mean duration of the trips. For example, the average trip length for the potential rider by car is said to be 18 minutes, while the same trip by bus is thought to take 38 minutes. This is a ratio of 2.1 minutes by bus for every 1 minute by car.

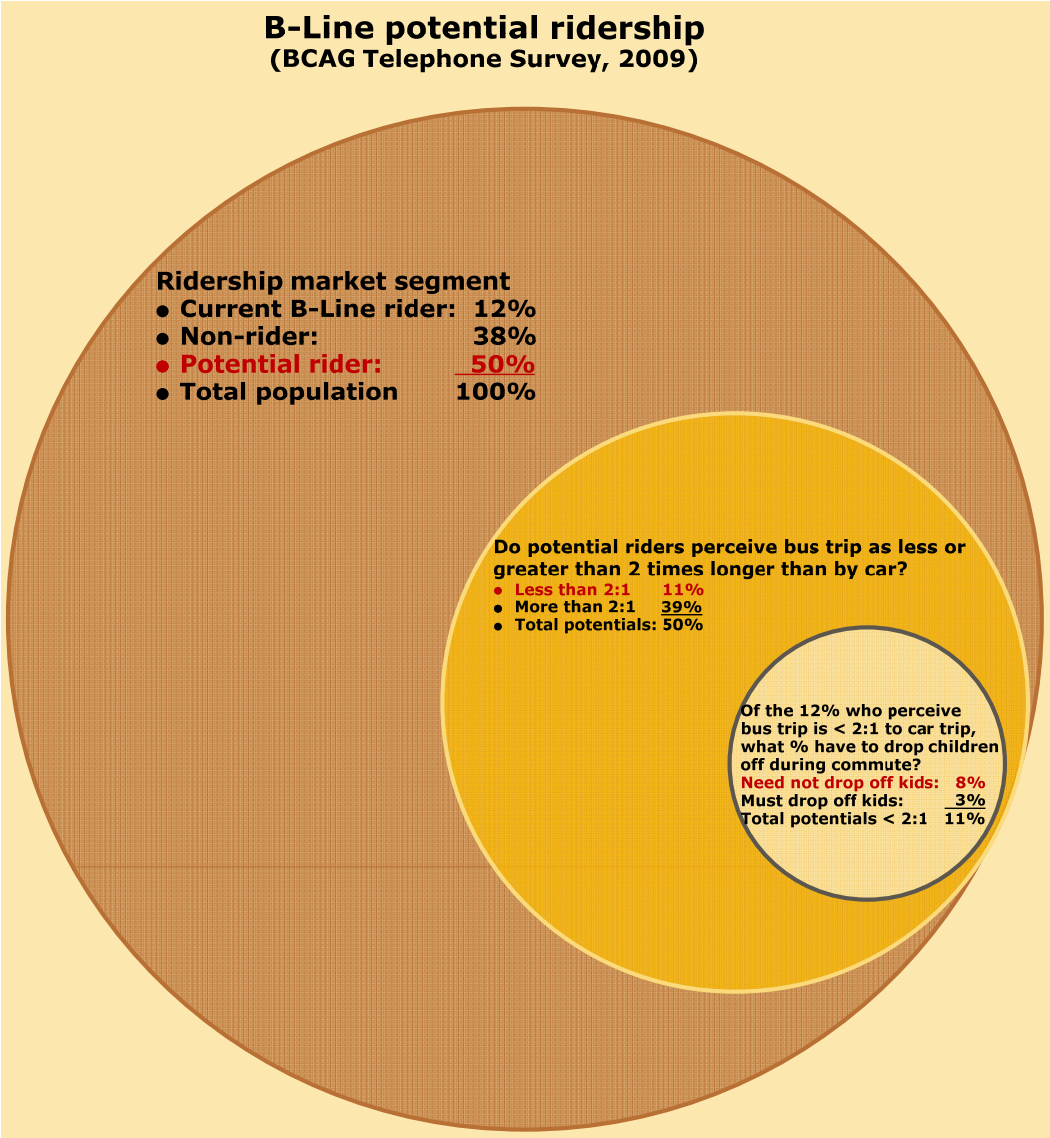
The ratios are as important to customer behavior as the absolute times. Typically, those most willing to consider using public transit perceive the ratio of time-by-transit to time-by-car to be less than 2:1 for their typical trips.

Figure 21 Mean time for trip by car and by bus

Estimated trip times

	Time by car	Time by bus	Ratio (bus/car)
B-Line Rider	20	38	1.9 : 1
Potential rider	18	38	2.1 : 1
Non-rider	18	41	2.3 : 1
Total	18	39	2.1 : 1

Figure 22 Venn diagram of high potential ridership

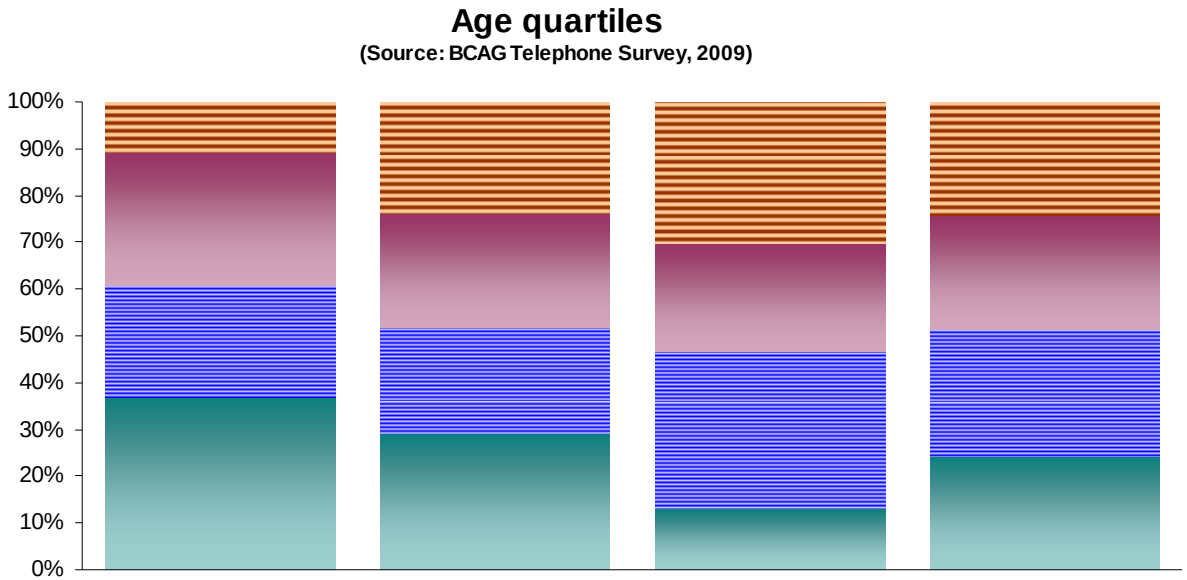


When we combine these results with the results from Figure 14 (having to drop children off at school) and take only those potential riders who perceive the trip by B-Line as being less than twice as long as by car and who do not need to drop off children at school, we find that:

- 11% of the total population feel that their typical trip by bus would not take longer than twice the time of the same trip by car.
- Within that 11%, 8% do not have to drop off children during their commute – a key factor in making it feasible to use transit.
- Thus, on these criteria alone, 8% of the service area adults are what we may consider prime prospects for using B-Line.

Demographics

Figure 23 Age of the market segments



	B-Line Rider	Potential rider	Non-rider	All Respondents
60 and older	11%	24%	30%	24%
45 to 59	28%	24%	23%	24%
27 to 44	24%	23%	33%	27%
19 to 26	37%	29%	13%	24%

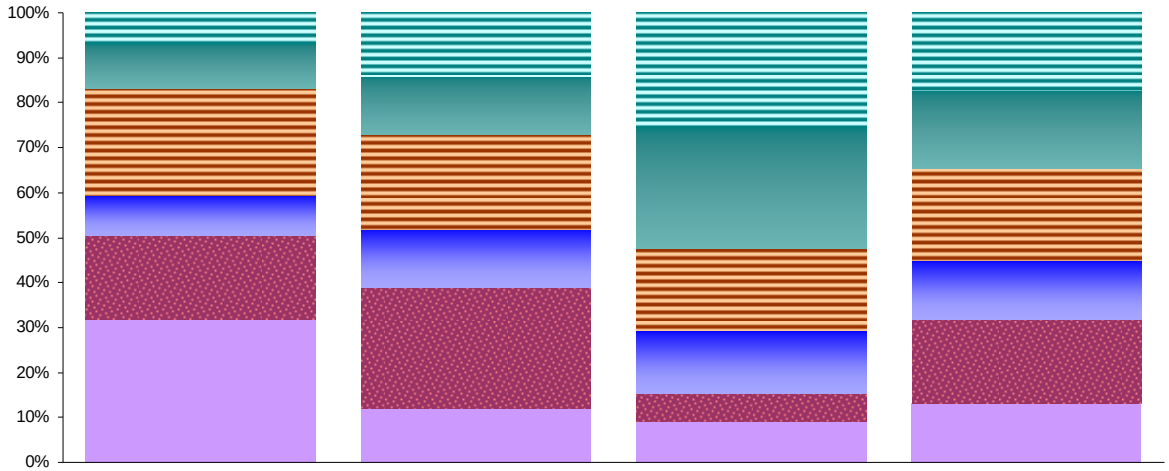
Age of the market segments

Respondents were divided into four approximately equal age groups for easy comparison among segments. The rider segments differ systematically in terms of age.

- Riders are more likely to be in the youngest quartile - ages 19-26 (37%) than either potential riders (29%) or non-riders (13%).
- Conversely, non-riders are more likely to be in the oldest group – 60+ (30%) than potential riders (24%) or current riders (11%).

The potential market is positioned precisely between the other segments in terms of age. This finding suggests that the prime market within the potential rider segment would be those most like the current riders in age—i.e. the younger potential riders – and least like the non-riders. That is, for marketing purposes it makes sense to focus on the younger potential riders from 19 to 44. Actually, the onboard survey showed a significant high school ridership. For this reason, efforts could also include persons younger than 19.

Figure 24 Income of the market segments



	B-Line Rider	Potential rider	Non-rider	All Respondents
$75,000 or more	7%	14%	25%	17%
$50,000 to $74,999	10%	13%	27%	17%
$35,000 to $49,999	24%	21%	18%	20%
$25,000 to $34,999	9%	13%	14%	13%
$15,000 to $24,999	19%	27%	6%	18%
Less than $15,000	32%	12%	9%	13%

Income of the market segments

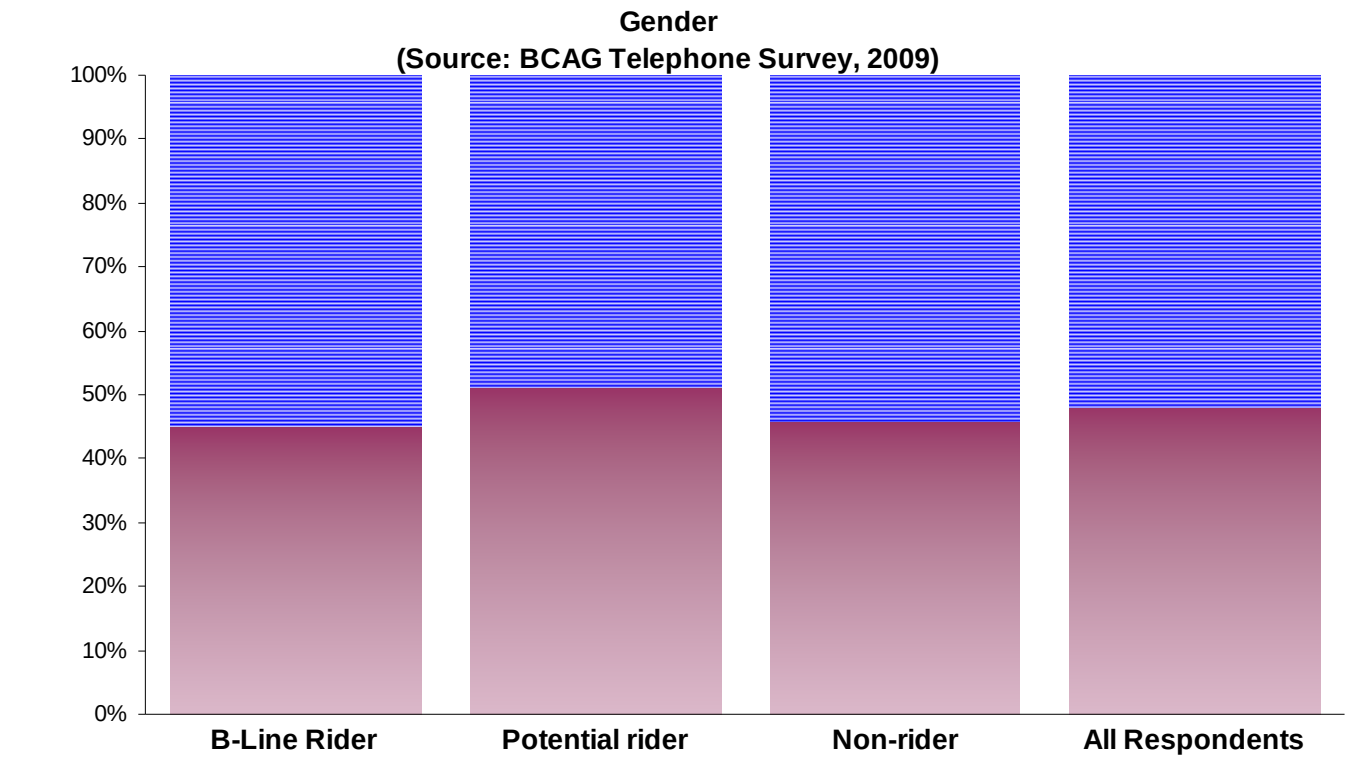
The transit market segments differ systematically in terms of total household income.

While 25% of the non-riders fall into the highest income level ($75,000+ household income), that is true of only 14% of potential riders and 7% of current riders.

Conversely, while 51% of current riders and 39% of potential riders fall into the lowest two levels of income (less than $25,000 household income), only 15% of non-riders have incomes this low.

In other words, as is true of all transit systems, interest in using B-Line is driven in part by a need to economize. The primary potential market for increased transit ridership is the younger, low to middle income potential rider.

Figure 25 Gender of market segments



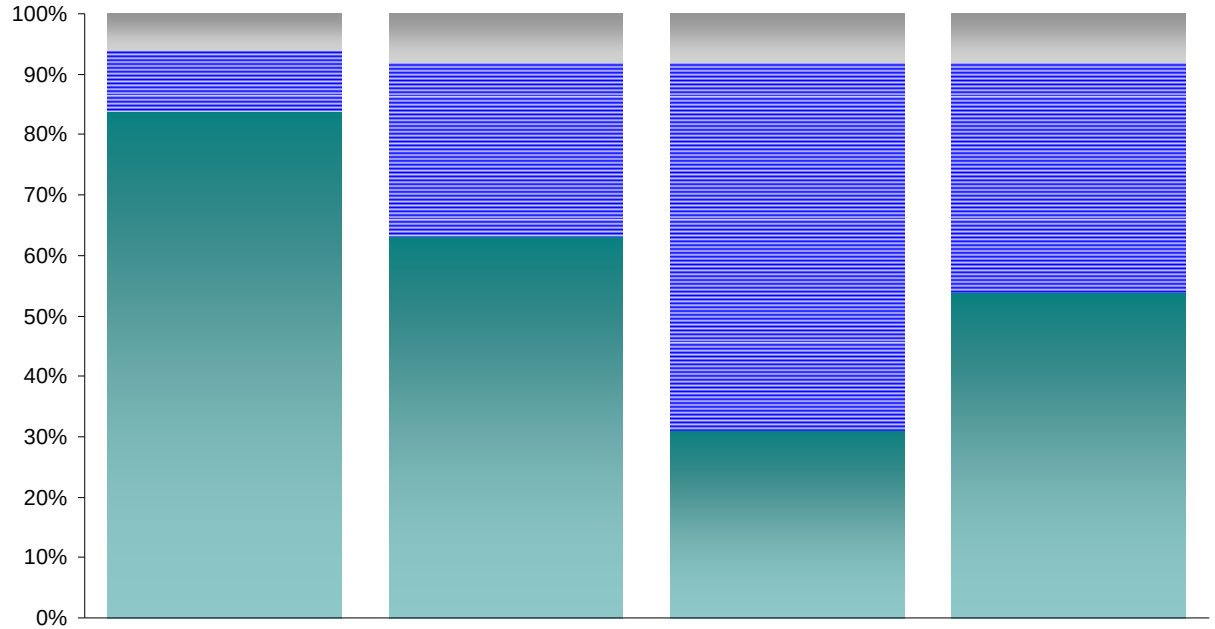
Gender of market segments

There is very little difference among the market segments in terms of gender although the potential riders may be slightly more likely to be male than are the other segments.

Perceptions of B-Line, and trade-off preferences if B-Line alters services

Figure 26 Would it be convenient to use B-Line?

Q28. Do you feel that using the B-Line buses on a regular basis would be convenient or inconvenient for you?
(Source: BCAG Telephone Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
Not sure	6%	8%	8%	8%
Inconvenient	10%	29%	61%	38%
Convenient	84%	63%	31%	54%

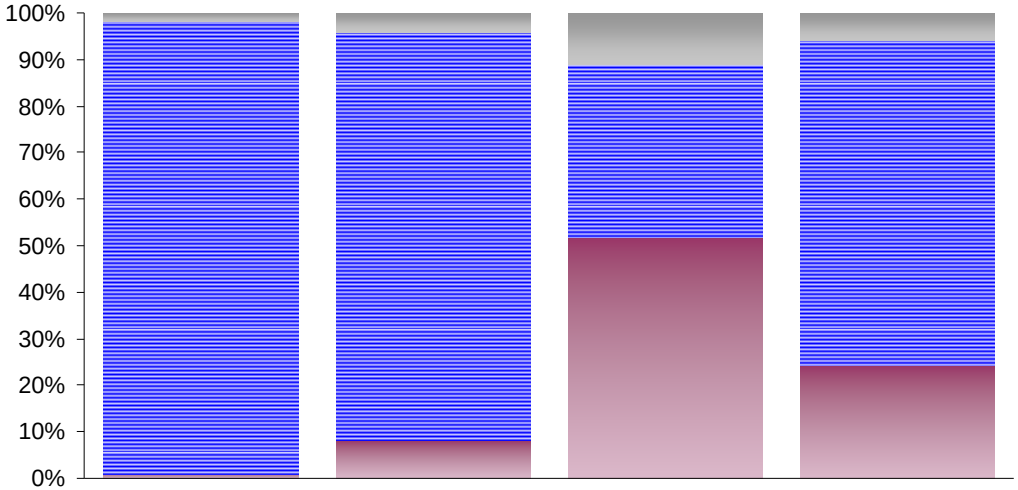
Perception of convenience of B-Line

A majority of all respondents (54%) say that it would be convenient to use B-Line. This is especially true of potential riders (63%), and, of course riders (84%).

Figure 27 Self-reported likelihood of using B-Line in coming year

Q29. There are many reasons people use public transit buses, and there are many reasons other people do not use them. Which of these describes you better?

(Source: BCAG Telephone Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
Not sure (vol)	2%	4%	11%	6%
With major improvements, it's likely I would try to use it in the coming year	97%	87%	37%	69%
Realistically, no matter how many improvements they make to B-Line service, you are not going to use it regularly	1%	8%	52%	24%

Likely use if B-Line made "major improvements"

If "major improvements" were made in B-Line service, 69% of the total sample – a surprisingly high number - say they would be likely to try using B-Line in the coming year. As one would expect, this is especially true of the riders and potential riders, but more than one-third of even the non-riders said they would be likely to try B-Line if major improvements were made.

It appears that the recent memories of gasoline prices of $4.00 a gallon coupled with the uncertainties of the recession (and possibly some marginal level of concern with environmental effects) have made people interested in finding less costly alternative modes of transportation.

Figure 28 Service trade-offs – Chico residents only

Service improvement choices for Chico residents

	A	Prefer A	Prefer B	B
Q18	Local buses in Chico could run weekdays only from 6 am to 10 pm.	41%	59%	Local buses in Chico could run seven days a week from 7 a.m. to 6 p.m.
Q19	Buses in Chico could run every 30 minutes throughout the day on weekdays only.	30%	70%	Buses in Chico could run every 60 minutes, seven days a week, with 30 minute service only during commute hours on weekdays.
Q20	Buses in Chico could run every 60 minutes from 6 a.m. to 10 p.m.	42%	58%	Buses in Chico could run every 30 minutes from 7 a.m. to 6 p.m.
Q21	More routes and more buses operating on local routes within Chico.	64%	36%	More buses on regional routes connecting Chico with the other communities in Butte County.
Q22	Bus routes that run every 60 minutes, and get you to your destination without transferring.	59%	41%	Bus routes that run every 30 minutes but require you to transfer to complete your trip.

Service trade-offs – Chico residents only

Respondents were asked to make choices between two service-related alternatives within each of five sets. The choices were varied depending on the respondent's location. Residents of Chico were asked one set and residents of other parts of the service area, a similar set that differed in several respects. However, with one major exception, the responses follow the same general pattern of offering different levels of service defined by hours or days of service and frequency of service.

We will examine first the choices offered Chico residents. The choices are shown in the table above along with the percentages of the total sample that chose each alternative. Specifically:

- Seven day service is preferred by more people than choose five extra hours of service for only five days (Q18).
- Seven days of 60 minute service plus 30 minute service in weekday peaks is preferred by more people than weekday-only 30 minute service (Q19).
- When variable days of service are not included in the choice, more frequent service (q20) is preferred over longer hours of service.
- More local service in Chico trumps more regional service (Q21).
- People prefer to avoid transfers (Q22) even at the cost of less frequent service.

Figure 29 Service trade-offs in areas other than Chico

Service improvement choices for residents of Butte County, not including Chico

	A	Prefer A	Prefer B	B
Q23	Local buses could run weekdays only from 6 am to 10 pm.	40%	60%	Local buses could run seven days a week from 7 a.m. to 6 p.m.
Q24	Buses could run every 60 minutes throughout the day on weekdays only.	47%	53%	Bus could run every two hours, seven days a week, with 60 minute service only during commute hours on weekdays.
Q25	Buses could run every two hours from 6 a.m. to 10 p.m.	39%	61%	Buses could run every 60 minutes from 7 a.m. to 6 p.m.
Q26	More routes and buses operating on local routes within your community.	40%	60%	More buses on regional routes connecting your community with the other communities in Butte County.
Q27	Bus routes that run every 90 minutes, and get you to your destination without transferring.	65%	35%	Bus routes that run every 60 minutes but require you to transfer to complete your trip.

Service trade-offs in areas other than Chico

The specific terms of service differ between the Chico and non-Chico questions.

- More days of service are preferred over more frequent service on fewer days (Q23).
- Seven days of less frequent service (peak hours excepted) are preferred over more frequent service weekdays only (Q24), although the preference gap is small (only 6% separate alternatives A and B in this case, the smallest gap of all choices.).
- When variable days of service are not included in the choice, more frequent service (q25) is preferred over longer hours of service.
- The different response is the preference in this part of the public for more regional rather than more local service (Q26) – the reverse of the Chico response.
- As with Chico respondents the non-Chico respondents prefer less frequent service with no transfer over more frequent service requiring a transfer.

Figure 30 Trade-offs, by market segment

Trade offs by segment

		Basic ridership segments			All Respondents
Chico Respondents		B-Line Rider	Potential rider	Non-rider	
Q18.	A Local buses in Chico could run weekdays only from 6am to 10pm	43%	40%	42%	41%
	B Local buses in Chico could run seven days a week from 7am to 6pm	57%	60%	58%	59%
Q19.	A Buses in Chico could run every 30 minutes throughout the day on weekdays only	37%	31%	27%	30%
	B Buses in Chico could run every 60 minutes, seven days a week with 30 minute service only during commute hours on weekdays	63%	69%	73%	70%
Q20.	A Buses in Chico could run every 60 minutes from 6am to 10pm	56%	46%	33%	42%
	B Buses in Chico could run every 30 minutes from 7am to 6pm	44%	54%	67%	58%
Q21.	A More routes and more buses operating on local routes within Chico	72%	71%	55%	64%
	B More buses on regional routes connecting Chico with the other communities in Butte county	28%	29%	45%	36%
Q22.	A Bus routes that run every 60 minutes, and get you to your destination without transferring	49%	64%	57%	59%
	B Bus routes that run every 30 minutes but require you to transfer to complete your trip	51%	36%	43%	41%
Respondents from areas other than Chico					
Q23.	A Local buses could run weekdays only from 6am to 10pm	35%	37%	47%	40%
	B Local buses could run seven days a week from 7am to 6pm	65%	63%	53%	60%
Q24.	A Buses could run every 60 minutes throughout the day on weekdays only	41%	44%	53%	47%
	B Buses could run every two hours, seven days a week, with 60 minute service only during commute hours on weekdays	59%	56%	47%	53%
Q25.	A Buses could run every two hours from 6 am to 10 pm	33%	41%	40%	39%
	B Buses could run every 60 minutes form 7 am to 6 pm	67%	59%	60%	61%
Q26.	A More routes and buses operating on local routes within your community	47%	47%	27%	40%
	B More buses on regional routes connecting your community with the other communities in Butte County	53%	53%	73%	60%
Q27.	A Bus routes that run every 90 minutes, and get you to your destination without transferring	43%	65%	72%	65%
	B Bus routes that run every 60 minutes but require you to transfer to complete your trip	57%	35%	28%	35%

Trade-offs, by market segment

The table above demonstrates preference patterns vary among the three market segments, but that for the most part, they do not differ greatly or in the direction of the majority preference. There are, however, a few interesting exceptions which are circled and discussed below.

One difference occurs between riders and potential riders on the matter of less frequent direct service *versus* more frequent service with transfers (Q22 and Q27). In Chico, riders split on that issue 49% to 51% while potential riders clearly favor the direct service option (64% to 46%). In areas other than Chico, the rider preference is stronger than in Chico for the more frequent service with transfers (57% to 43%), while the potential riders are almost identical to the Chico potential riders in preferring direct service by a margin of 65% to 35%. Transferring is a factor which increases the uncertainly of using transit. Perhaps current B-Line riders are already familiar with the timed transfer system and hence less put off by the idea of transferring

Another slight difference between riders and potential riders is seen only in Chico. Riders, who are more likely to be transit-dependent than potential riders, prefer longer hours even at the expense of frequency. Potential riders prefer higher frequency. However, neither of these preferences is terribly dominant.

A difference between Chico and the other communities is the preference for local versus regional services. In Chico, there is a strong preference for more local services. In other areas there is a slight preference for regional services. This is not surprising given that most Chico residents likely have little need to travel to Paradise or Oroville, while residents of these communities need to access the jobs and services available in Chico. Riders and potential riders are virtually identical on this question, while non-riders are much more likely to favor regional services.

Respondent comments

Respondents were asked two questions on an open-end basis:

- What is the main reason that would keep you from using B-Line on a regular basis?
- What is the one most important change in service that would lead you to try using B-Line regularly?

The responses have been categorized and are summarized in the following two tables.

- The first table shows the percent of responses in each category by city of residence.
- The second table breaks the data down by destination city.

Verbatim responses are included in an attached Excel file.

Categorized Open Ended Responses by Residence

Q30.	What is the main reason that would keep you from trying B-Line on a regular basis?	City of Residence: Chico	Magalia	Oroville	Paradise	Other city or town	Total respon-dents
1	Age, health, physical limitations	12%	5%	3%	8%	18%	9%
2	Bus takes too long	3%	3%	18%	2%	0%	5%
3	Don't like riding bus	16%	0%	4%	5%	0%	9%
4	Want flexibility	12%	12%	3%	4%	4%	8%
5	Impractical for errands, carrying packages	4%	0%	4%	6%	0%	4%
6	Need vehicle for work purposes	7%	3%	7%	5%	0%	6%
7	No need to use bus	3%	8%	14%	5%	16%	6%
8	No bus service in my area	3%	0%	8%	5%	24%	5%
9	Prefer car	15%	26%	7%	22%	0%	16%
10	Bus stop is too far	3%	0%	9%	2%	0%	3%
11	Travel with kids	7%	37%	0%	8%	13%	9%
12	Other	17%	6%	24%	27%	26%	20%
n	Number of survey respondents per community	83	18	33	54	15	203
Q31.	**What would be the one most important change in service that would lead you to try using B-Line regularly?**						
1	Bus comfort, safety	5%	9%	21%	5%	1%	8%
2	Provide service to my area	2%	3%	1%	3%	16%	4%
3	Bus stop conditions, safety, shelters	5%	1%	2%	1%	3%	3%
4	Frequency of service	24%	20%	20%	25%	28%	23%
5	More handicapped-friendly	2%	2%	5%	3%	1%	3%
8	Extended hours, days of service	14%	12%	4%	7%	0%	9%
9	More routes	23%	6%	26%	27%	17%	22%
10	On-time service	6%	13%	5%	1%	6%	5%
12	Proximity of bus stop	12%	29%	14%	19%	23%	16%
13	Other	8%	6%	4%	10%	6%	7%
n	Number of survey respondents per community	174	32	70	86	51	413

Categorized Open Ended Responses by Destination

Q30.	What is the main reason that would keep you from trying B-Line on a regular basis?	Commute destination: Chico	Oroville	Paradise	Other city or town*	Total respon-dents
1	Age, health, physical limitations	3%	0%	0%	0%	1%
2	Bus takes too long	0%	27%	0%	6%	4%
3	Don't like riding bus	29%	0%	0%	19%	19%
4	Want flexibility	8%	7%	0%	14%	8%
5	Impractical for errands, carrying packages	5%	0%	16%	0%	5%
6	Need vehicle for work purposes	2%	21%	14%	20%	11%
7	No need to use bus	4%	13%	7%	2%	5%
8	No bus service in my area	5%	5%	3%	6%	5%
9	Prefer car	9%	0%	33%	4%	11%
11	Travel with kids	12%	0%	0%	0%	5%
12	Other	23%	27%	27%	30%	26%
n	Number of survey respondents per community	24	6	12	19	61

Q31.	What would be the one most important change in service that would lead you to try using B-Line regularly?					
1	Bus comfort, safety	8%	18%	1%	8%	9%
2	Provide service to my area	6%	0%	3%	1%	3%
3	Bus stop conditions, safety, shelters	4%	3%	2%	3%	3%
4	Frequency of service	26%	19%	32%	28%	26%
8	Extended hours, days of service	16%	10%	4%	10%	12%
9	More routes	26%	23%	33%	13%	24%
10	On-time service	4%	11%	0%	6%	5%
12	Proximity of bus stop	6%	15%	18%	15%	12%
13	Other	4%	0%	6%	16%	6%
n	Number of survey respondents per community	64	24	23	31	142

*Due to the small sample size for Magalia as a commute destination, this community is included in "other city or town" column

Appendix A: Questionnaire

B-Line Telephone Questionnaire, 2009

SECTION 1: INTRO & BASIC AWARENESS

Hello, we are conducting a survey in the Butte County area concerning 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 person in your household eighteen or older who had the most recent birthday? [IF THAT PERSON IS NOT AVAILABLE, ASK FOR ANOTHER ADULT 18 OR OLDER]

1 Interviewer indicate gender by observation
- (1) Male
- (2) Female
- (3) Unknown

2 Do you happen to know the name of the agency that provides local bus service in the areas of Chico, Paradise and Oroville? **[UNAIDED - DO NOT READ RESPONSES]**
- (1) B-Line (3)
- (2) The bus company (a)
- (3) The city / the municipality (a)
- (4) Other name given (a)
- (5) Not sure (a)

(a) Just so you'll know while I ask you other questions, the local bus system I want to ask about is called B-Line (3)

SECTION 2: INITIAL POTENTIALITY MEASURE

3 Let's say that B-Line's local bus service came within a block or two of your home, ran frequently, and ran directly to a block or two of where you need to go anywhere in the Butte County area. Thinking realistically, how likely would you be to use a B-Line once a month or more -- very likely, somewhat likely, not very likely, or definitely would not?

(1) Very likely ("POTENTIAL RIDER")
(2) Somewhat likely ("POTENTIAL RIDER")
(3) Not very likely ("DEFINITE NON-RIDER")
(4) Definitely would not ("DEFINITE NON-RIDER")
(5) Couldn't -- need car at work ("DEFINITE NON-RIDER")
(6) Couldn't -- other problem would prevent it ("DEFINITE NON-RIDER")
(7) Not sure ("DEFINITE NON-RIDER")
(8) I already use B-Line (RIDER – PROCEED AS IF A POTENTIAL RIDER BUT DO NOT COUNT TOWARD THE QUOTA OF 300 POTENTIAL RIDERS
(9) Refused **[TERMINATE]**

SECTION 4: TRAVEL NEEDS & PATTERNS

4 Are you presently employed outside the home?

(1) Yes
(2) No

5 Are you a student **(IF EMPLOYED** "…also a student?")

(1) Yes
(2) No

6 EMPLOYMENT CODES. THESE CODES ARE TO AUTO-FILL BASED ON Q4 AND Q5]

1=EMPLOYED, NOT A STUDENT (7)
2=EMPLOYED AND A STUDENT (7)
3=STUDENT ONLY (8)
4=NEITHER A STUDENT NOR EMPLOYED (9)

7 To help plan public transportation services we need to know several things about people's transportation needs, including how and where the commute. In the past twelve months have you most often commuted to work by driving alone all the way, carpooling with others, using public transit all or part of the way, or by another means of transportation?

(1) Driving alone all the way to work (IF Q5=2, ASK Q10; IF Q5=1, ASK Q8)
(2) Car pooling (or van pooling) (IF Q5=2, ASK Q Q10; IF Q5=1, ASK Q8)
(3) Public transit (IF Q5=2, ASK Q Q10; IF Q5=1, ASK Q8)
(4) [VOL] Walking (IF Q5=2, ASK Q Q10; IF Q5=1, ASK Q8)
(5) [VOL] Bicycle (IF Q5=2, ASK Q Q10; IF Q5=1, ASK Q8)
(6) [VOL] Telecommute (IF Q5=2, ASK Q Q10; IF Q5=1, ASK Q8)
(7) REF (IF Q5=2, ASK Q Q10; IF Q5=1, ASK Q8)

8 [ASK ONLY OF STUDENTS. i.e. Q5=1] In the past twelve months have you most often commuted to school by driving alone all the way to school, carpooling with others, using public transit all or part of the way, or by another means of transportation?

(1) Driving alone all the way to school (10)
(2) Car pooling (or van pooling) (10)
(3) Public transit (10)
(4) [VOL] Walking (10)
(5) [VOL] Bicycle (10)
(6) [VOL] Telecommute (10)
(7) REF

9 [ASK ONLY OF THOSE NOT EMPLOYED AND NOT STUDENTS I.E. Q4=2 AND Q5=2]Thinking about the local trips you make in Butte County, in the past twelve months have you most often made those types of trips by driving alone all the way to work, carpooling with others, using public transit all or part of the way, or by another means of transportation?

(1) Driving alone all the way (11)
(2) Car pooling (or van pooling) (11)
(3) Public transit (11b)
(4) [VOL] Walking (11)
(5) [VOL] Bicycle (11)
(6) REF (11)

10 Is your (Pipe in workplace or school) located in Chico, Paradise or Oroville, or is it in city or town other than those?

(1) Biggs
(2) Chico
(3) Gridley
(4) Magalia
(5) Oroville
(6) Paradise
(7) Butte College Main Campus
(8) Sacramento
(9) In another city or town (a)
(10) Not sure
(11) REF

(a) Would you tell me the name of the city or town where it is located?
_____ 99=REF

11 Have you personally ridden a B-Line bus at all since 2005?

(1) Yes (a)
(2) No (skip to Q13)
(3) Refused **[TERMINATE]**

(a) Since last year at this time, have you used B-Line at all?
(1) Yes (b)
(2) No (c)

(b) Are you now using B-Line three or more days a week, one or more days a week, a few times a month, or less than once a month?
(1) 3 or more days per week
(2) 1 or 2 days per week
(3) One or more times per month
(4) Less than once a month

(c) When you were using B-Line, did you use B-Line several times a week, about once a month or more, or do you use it less than once a month?
(1) Several times a week
(2) Occasionally
(3) Less often
(4) Do not remember

12 QUOTA ASSIGNMENT: Total number of interviews = 600

(1) Potential Rider:	**Q3 = 1 or 2**	**Minimum n=300 (no max)**
(2) Rider:	**Q3 = 8**	**just count**
(3) Non Rider	**Q4 = 3, 4, 5, 6, 7**	**just count**

13 Now, I would like to ask you about something different. Please think for a moment about the local area trip you take more often than any other local trip in the Butte County area, whether it is commuting or other reasons. When you make that trip by car, about how long does it normally take? _____ minutes

14 If you made that same local trip by B-Line, about how long do you think it would normally take? _____ minutes

9999 (VOL) Couldn't – B-Line does not run there

15 In the typical week, on how many days, if at all, do you travel from one city to another among Chico, Oroville and Paradise for any reason? Never, less than once a week, one or two days, three or four days, or five or more days?
(1) None at all
(2) Less than once a week
(3) One or two days
(4) Three or four
(5) Five or more
(6) REF

16 In a typical month, on how many days, if at all, do you go to Sacramento? Never, less than once a month, one or two days, three or four days, or five or more days?

(1) None at all
(2) Less than once a month
(3) One or two days a month
(4) Three or four days a month
(5) Five or more days a month
(6) Daily
(7) REF

17 **[WORDING IF Q3 = 1,2,7, OR 8]** B-Line is considering various changes in its transit services. As you probably know, B-Line has a limited budget so they can do some things people might like, but they cannot do everything. The question is, which would you choose if you had a choice?

17 **[WORDING IF Q3 = 3,4,5, OR 6]** Earlier you told me there would not be any way you would use the public bus system. But sometimes people move, or they change jobs or other circumstances change unexpectedly. So in the future, if you if you wanted to or had to use public transit, I would like to ask what kinds of transit service you would like in the local bus service.

The service changes will differ among the towns in Butte County. So before I ask about your choices, I need to ask if you live in Chico, Paradise, Oroville, Biggs, Gridley, or Magalia.

(1) Biggs
(2) Chico
(3) Gridley
(4) Magalia
(5) Oroville
(6) Paradise
(7) In another city or town (a)
(8) Not sure / refused (TERMINATE)
    (a) Specify: _____

In the following sets of choices, would you choose the one I read first or the one I read second in each case? The first choice is…

CHICO RESIDENTS (2 in Q17) ANSWER QUESTIONS 18 TO 22

18	**A**	Local buses in Chico could run weekdays only from 6 am to 10 pm.	**OR B**	Local buses in Chico could run seven days a week from 7 a.m. to 6 p.m.

Do you prefer A or B?

19	**A**	Buses in Chico could run every 30 minutes throughout the day on weekdays only.	**OR B**	Bus in Chico could run every 60 minutes, seven days a week, with 30 minute service only during commute hours on weekdays.

Do you prefer A or B?

20	**A**	Buses in Chico could run every 60 minutes from 6 a.m. to 10 p.m.	**Or B**	Buses in Chico could run every 30 minutes from 7 a.m. to 6 p.m.

Do you prefer A or B?

21	**A**	More routes and more buses operating on local routes within Chico.	**Or B**	More buses on regional routes connecting Chico with the other communities in Butte County.

Do you prefer A or B?

22	**A**	Bus routes that run every 60 minutes, and get you to your destination without transferring.	**Or B**	Bus routes that run every 30 minutes but require you to transfer to complete your trip.

Do you prefer A or B?

ALL WHO ARE NOT CHICO RESIDENTS (OROVILLE, PARADISE, GRIDLEY, MAGALIA, BIGGS, PALERMO, OTHER (1,3,4,5,6,7,8 in Q17)) ANSWER QUESTIONS 23 TO 27

23	**A**	Local buses could run weekdays only from 6 am to 10 pm.	**OR B**	Local buses could run seven days a week from 7 a.m. to 6 p.m.

Do you prefer A or B?

24	**A**	Buses could run every 60 minutes throughout the day on weekdays only.	**OR B**	Bus could run every two hours, seven days a week, with 60 minute service only during commute hours on weekdays.

Do you prefer A or B?

25	**A**	Buses could run every two hours from 6 a.m. to 10 p.m.	**Or B**	Buses could run every 60 minutes from 7 a.m. to 6 p.m.

Do you prefer A or B?

26	**A**	More routes and buses operating on local routes within your community.	**Or B**	More buses on regional routes connecting your community with the other communities in Butte County.

Do you prefer A or B?

27	**A**	Bus routes that run every 90 minutes, and get you to your destination without transferring.	**Or B**	Bus routes that run every 60 minutes but require you to transfer to complete your trip.

Do you prefer A or B?

28 Do you feel that using the B-Line buses on a regular basis would be convenient or inconvenient for you?
(1) Convenient
(2) Inconvenient
(3) Not sure

29 There are many reasons people use public transit buses, and there are many reasons other people do not use them. Which of these describes you better?
(1) Realistically, in your personal situation, no matter how many improvements they make to B-Line service, you are just not going to use it on any regular basis.
(2) Or, if B-Line makes major improvements, it is likely you will try using it within the coming year?
(1) Not going to use it on a regular basis (30)
(2) Likely will try it in the coming year (31)
(3) Not sure (30 and 31)

30 What is the main reason that would keep you from trying B-Line on a regular basis?

_____

31 What would be the one most important change in service that would lead you to try using B-Line regularly?

_____

32 Do you happen to know where the bus stop nearest your home is located?
(1) Yes (33)
(2) No (35)
(3) Not sure (35)

33 Is it in walking distance?
(1) Yes
(2) No
(3) Not sure

34 About how many minutes would it take to walk to it? _____ 999=not sure

SECTION 8: DEMOGRAPHICS

35 To end up, I have some background questions that will be used only to help us analyze the results of the study. Like all of your answers, this information will be kept completely confidential. First, do you always have a vehicle available for your own use, or do you share a vehicle, or do you not have a vehicle?

(1) Own
(2) Share
(3) None

36 Is there any other person in your household who uses B-Line regularly – at least once a week or more? (Not school buses – only the B-Line)

(1) Yes (a)
(2) No
(3) Not sure

(a) Is that person
(1) a child or student
(2) an adult
(3) a senior citizen

37 [ASK IF (Q4 =1) and (Q7=1 OR Q8=1)] Do you have to use your car during your workday for your job (not just for personal errands)?

(1) Yes, often
(2) Yes, occasionally
(3) Yes, rarely
(4) Never or almost never

38 As part of your daily routine, do you have to drop kids off at child care or school?

(1) Yes
(2) No
(3) REF

39 In what year were you born? 19_____ (999=Refused)

40 **[ASK ONLY IF Q4=1]** During the past week, did you work on weekdays or also on weekends

(1) Both weekdays and weekends
(2) Only weekdays
(3) Only weekends

(4) REF

41 **[ASK ONLY IF Q4=1]** Do you have to work any evenings after 8:00 o'clock when most local bus service would have stopped running even if you wanted to use it?

(1) Yes
(2) No
REF

42 And the final question, which of the following groups does your total annual household income fall into? (read as $10,000 TO LESS THAN $15,000)

(1) Less than $10,000
(2) $10,000 to $14,999
(3) $15,000 to $19,999
(4) $20,000 to $24,999
(5) $25,000 to $34,999
(6) $35,000 to $49,999
(7) $50,000 to $74,999
(8) $75,000 to $100,000
(9) $100,000 to $125,000
(10)$126,000 to $150,000
(11) More than $150,000
(12)REFUSED

Appendix B: Detailed Comments

Attached Excel File.

E-Survey

Butte County Commuters

Conducted with the participation of:

- CSU, Chico
- Butte College
- Butte County Employers

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Introduction

Figure 1 Profile of the respondents

Affiliations and characteristics of the respondents

		Count	Column N %
With which institution are you affiliated?	Butte Community College	774	27%
	CSU, Chico	1596	55%
	A private employer	211	7%
	A public agency employer	314	11%
	Total	2895	100%
Are you a student or faculty or staff?	Student	1455	61%
	Faculty	265	11%
	Staff	647	27%
	Total	2367	99%
Do you live on or off campus?	On campus	59	4%
	Off campus	1384	96%
	Total	1443	100%
Will you stay in Butte County during the summer break coming up?	Yes	969	67%
	No	471	33%
	Total	1440	100%
Are you a full or part time student?	Full time (Full credit load)	1232	86%
	Part time (Less than full credit load)	206	14%
	Total	1438	100%
Which year are you in?	First / Freshman	283	20%
	Second / Sophomore	300	21%
	Third / Junior	356	25%
	Fourth / Senior	366	25%
	Graduate program	135	9%
	Total	1440	100%

Methodology

In April and early May, 2009, an e-Survey was conducted of employees and college students at several Butte County institutions. With the assistance of CSU, Chico, Butte College and many area employers, data was collected from nearly 3000 Butte County commuters.

It is important to note that the participants in this survey are not a random sample and that the results cannot be projected to the broader population based on random sampling statistics. However, the respondents do represent a large portion of the potential response base of local students and employees, and in that respect, their responses are highly useful for understanding the views of individuals who work or study in Butte County.

In addition to not being a random sample, the participants in this survey are not drawn from the general population. They are employees or students only at the participating institutions. They are unlikely to share the same distribution as the total public as measured by the parallel telephone survey.

On the other hand, this sample does include the same sub-groups as found in the general population – current riders, potential riders and non-riders – and is likely to reflect the same contrasts between those segments. In other words, the differences among current B-Line riders, potential riders and non-riders will tend to reflect those in the larger population as well as within the target commuter population.

How the e-Survey was implemented

CSU, Chico, Butte College, major employers and the Chambers of Commerce were invited to participate in the survey. An invitation was emailed to their students and/or employees with an email address at work or college. It was mailed by the employer or college, not by CJI Research or BCAG. The invitation promised confidentiality.

The invitation contained a link to click to enter the CJI Survey Site where a ten minute survey could be completed online.

A total of 2,895 people responded to the survey invitation with information sufficiently complete that it could be included in the analysis. However, in an online survey such as this it is not practical to require a respondent to respond to every question because to do so results in a high abandonment rate. Consequently, there is some drop-off in the number of people responding to certain questions. The sample is so large, however, that this is not a problem.

Participating employers

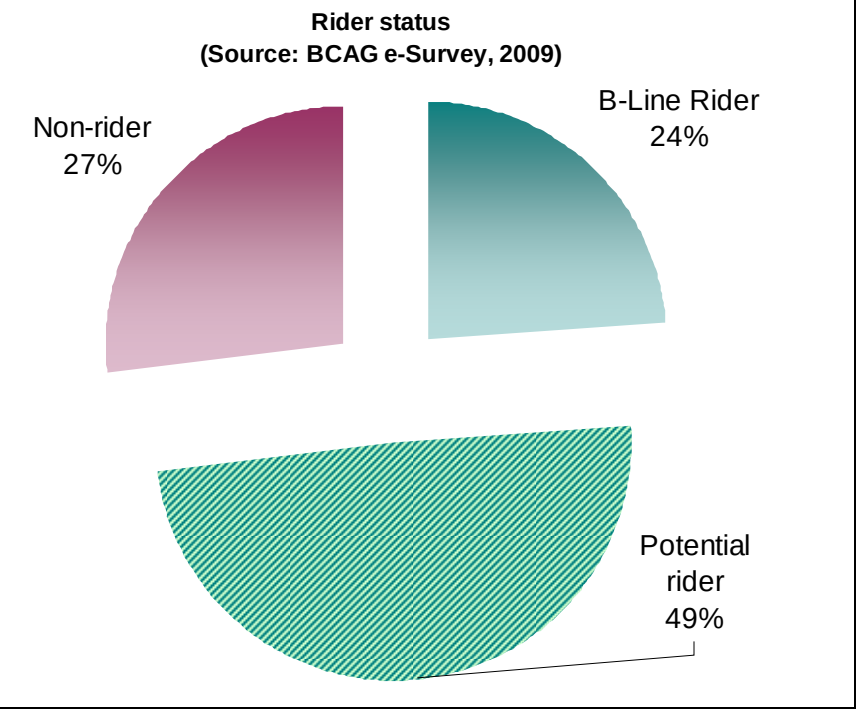
CSU, Chico and Butte College sent the e-mail invitation to all students, staff and faculty. In addition, many other employers participated in the survey to some extent. Most of them were Butte County offices. The table below shows the number of participating responsdents from each employer. In some cases the respondents provided a county office or department name; in other cases simply the notation "Butte County."

Figure 2 Other employers participating in the survey

Employer if not CSU or BCC	% of all respondents from these agencies or companies
Other employer	82.28%
Enloe Medical Center	6.49%
Butte County	4.53%
Butte County Employment and Social Services	1.41%
City of Chico	0.97%
Butte County Behavioral Health	0.83%
Sierra Nevada Brewing Co.	0.73%
Butte County Department of Child Support Services	0.38%
Butte County Public Health Department	0.31%
Associated Pension Consultants	0.24%
Butte County Sheriff's Office	0.24%
Butte County Probation Department	0.21%
Butte County Dept of Public Health	0.10%
Butte County Library	0.10%
Butte County Assessor	0.07%
Butte County Public Works	0.07%
City Of Chico	0.07%
Self	0.07%
Associated Students Bookstore	0.03%
Butte Co Dept of Social Services	0.03%
Butte Community Employment Center	0.03%
Butte County Adult Services	0.03%
Butte County Animal Control	0.03%
Butte County Auditor-Controller	0.03%
Butte County Counsel	0.03%
Butte County Development Services	0.03%
Butte County District Attorney's Office	0.03%
Butte County Government	0.03%
Butte County Health Department	0.03%
Butte County Jail	0.03%
Butte County Planning	0.03%
Butte County Social Services	0.03%
Butte LAFCo	0.03%
CARD	0.03%
Chico Community Children's Center	0.03%
Coast Physical Therapy	0.03%
Compass Group	0.03%
EDS	0.03%
Elbert	0.03%
GAPI	0.03%
Improvement Direct, Inc.	0.03%
Passages	0.03%
Raleys	0.03%
Red Lobster	0.03%
Social Services	0.03%
State of California	0.03%
University of California Davis-Cooperative Extension	0.03%

Local Transit Awareness and Use Profile

Figure 3 Transit market segments



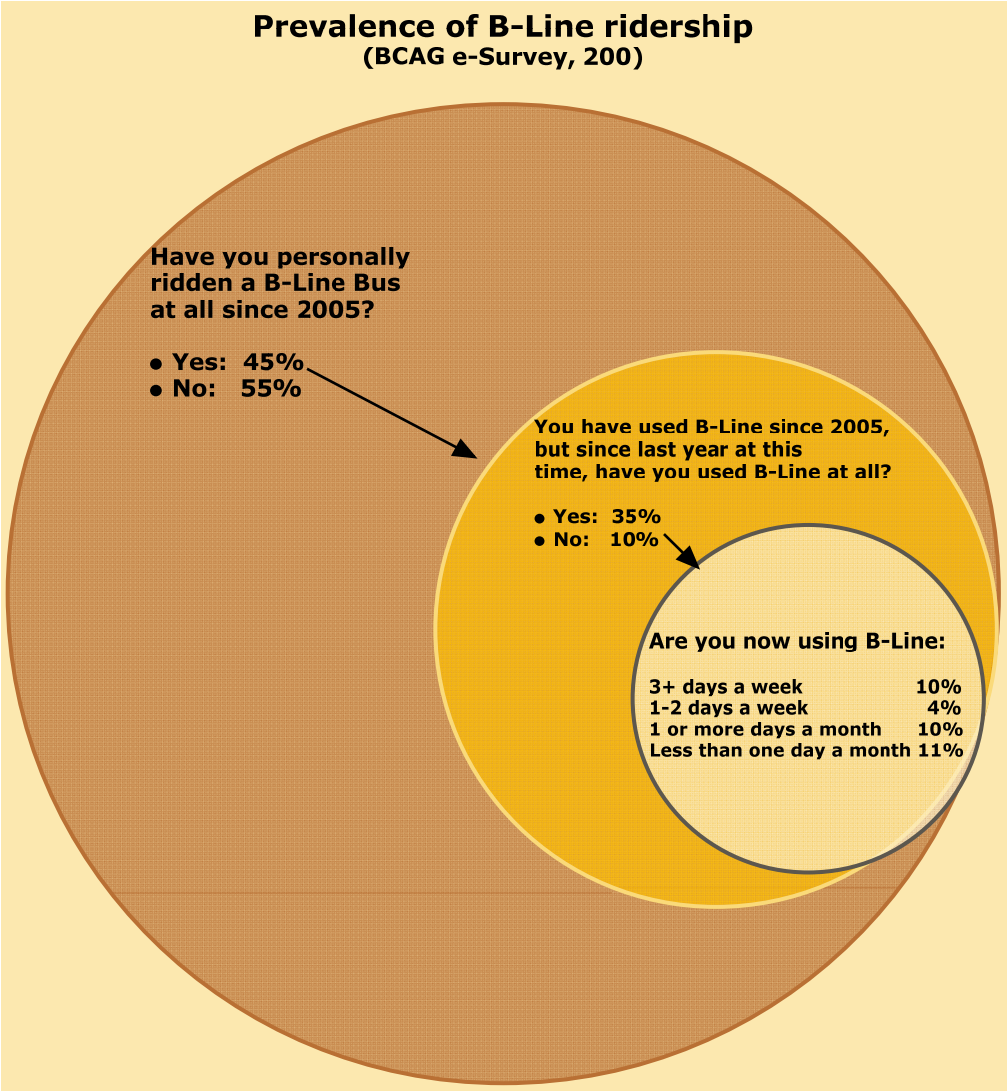
Transit market segments

The transit market among the respondents includes three major segments:

- "Current B-Line riders" (24%). These individuals use public transportation at least once a month.
- "Potential riders" (49%). These individuals currently do not ride, but are open to the idea of using public transit.
- "Staunch non-riders" (27%). These individual say they will not use public transit and are referenced in the charts as "non-riders."

In the remainder of this report, most charts will be broken down into the three market segments shown in Figure 3. Charts also include an "all respondents" value, which includes all three segments. This will appear at the far right. (See example in Figure 8, page 15.)

Figure 4 Prevalence of current and recent ridership



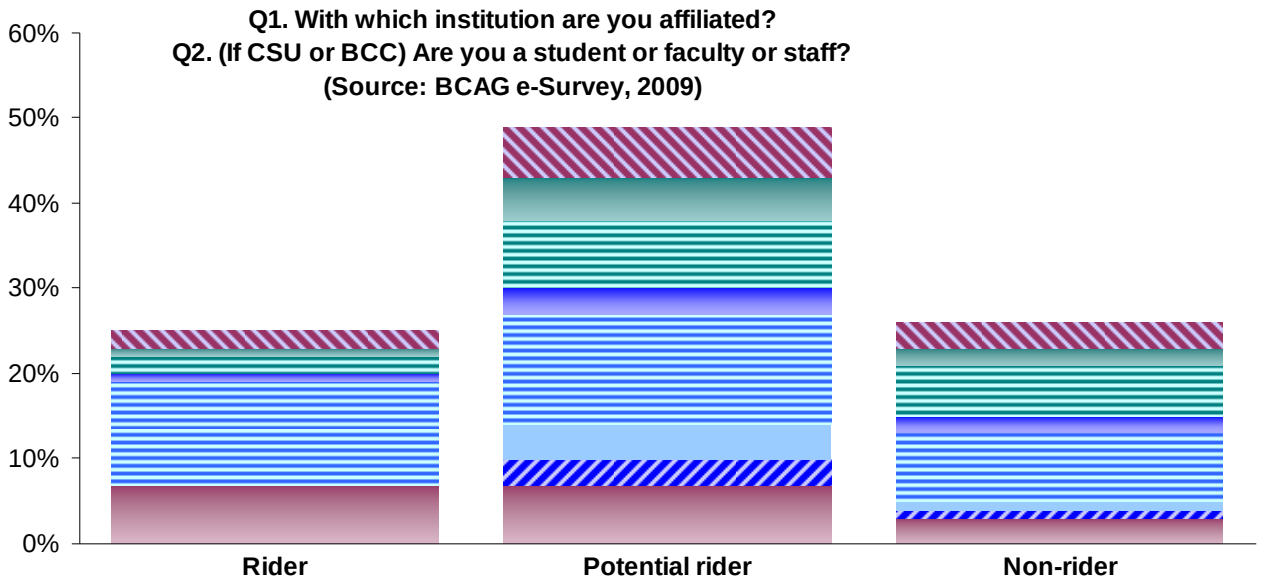
Prevalence of current and recent ridership

Respondents were asked a series of three questions to determine their use of B-Line. Had they used B-Line since 2005? If so, had they used it since last year at this time? If so, how often were they currently using B-Line? The Venn diagram is not to scale, but represents the relationships of the groupings.

Notice that 45% of all respondents said they had used B-Line at some time since 2005. Of these, 35% said they had used B-Line in the past year, while the balance (10%) had used it since 2005, but prior to 2008.

A total of 24% currently use B-Line once a month or more, including 10% who use it three or more days a week, 4% who use it one or two days a week, and 10% who use it only a few times a month.

Figure 5 Affiliations and student status



	Rider	Potential rider	Non-rider
Public agency	2%	6%	3%
Private employer	1%	5%	2%
CSU staff	2%	8%	6%
CSU faculty	1%	3%	2%
CSU student	12%	13%	8%
Butte Com Col staff	0%	4%	1%
Butte Com Col faculty	0%	3%	1%
Butte Com Col student	7%	7%	3%

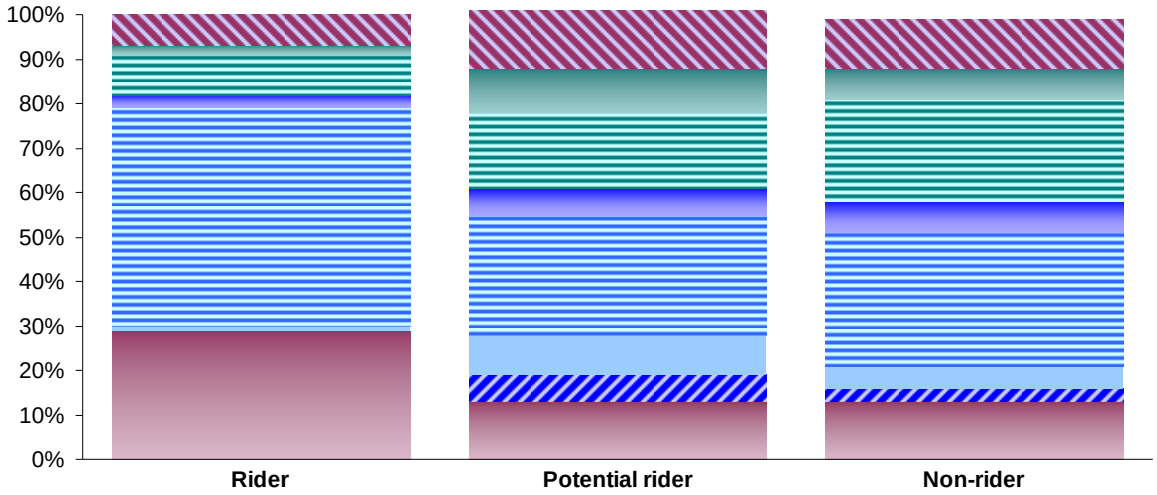
Affiliations and student status

The chart at the left indicates the distribution of the total sample among the market segments, the employers, and the respondents' status within CSU and Butte College.

The largest groups of respondents are students at CSU (33%) and Butte College (17%). This will strongly influence the results.

Figure 6 Institutional affiliation of the market segments

Q1. With which institution are you affiliated?
Q2. (If CSU or BCC) Are you a student or faculty or staff?
(Source: BCAG e-Survey, 2009)



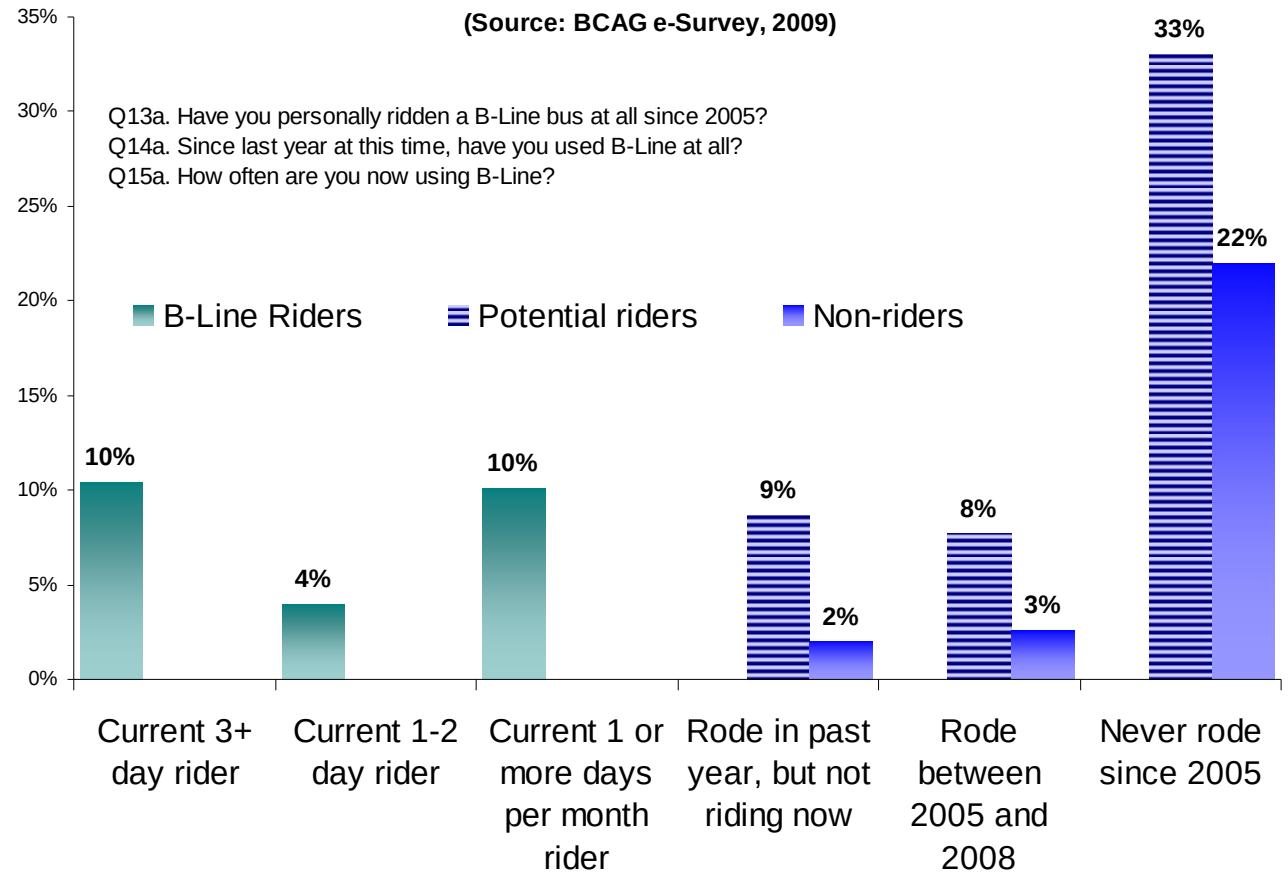
	Rider	Potential rider	Non-rider
Public agency	7%	13%	11%
Private employer	2%	10%	7%
CSU staff	9%	17%	23%
CSU faculty	3%	6%	7%
CSU student	49%	27%	30%
Butte Com Col staff	1%	9%	5%
Butte Com Col faculty	0%	6%	3%
Butte Com Col student	29%	13%	13%

Institutional affiliations of the market segments

Students dominate the three segments, especially the riders.

- B-Line riders are primarily students at CSU (49%) and BC (29%). Only 9% of the riders are not affiliated with these schools, and only 22% are not students there.
- Of potential riders, 27% are CSU students and 13% BC students.
- However, a total of 55% of potential riders are not students. Of these, some are faculty or staff at BC (15%) or CSU (23%), while others are employees of public agencies (primarily Butte County, 13%), or private employers (10%).
- Non-riders are quite similar to the potential riders in terms of their affiliations. In other words, the differences between non-riders and potential riders do not originate in their affiliations.

Figure 7 History of using B-Line since 2005, by market segment



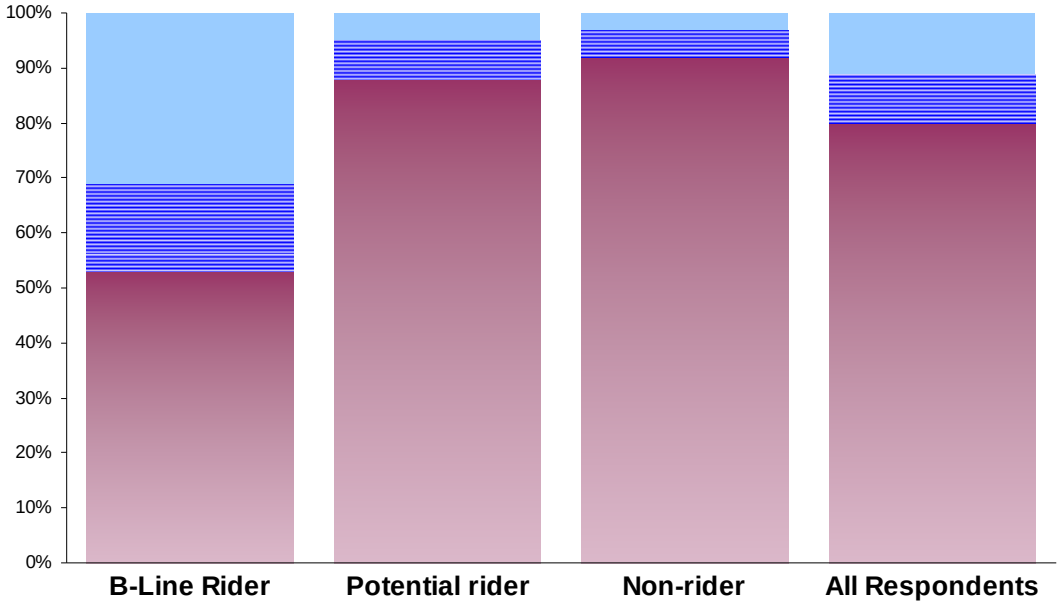
Use of B-Line since 2005, by market segment

The history of B-Line use by all three market segments is shown in the chart. The chart represents percentages of all respondents and thus the sum of all percentages in the chart is 100%.

- Riders: Current B-Line riders total 24% and vary in frequency of using B-Line.
- Potential riders total 49%, and most have not used B-Line since 2005. However, 9% of all respondents are potential riders who have used B-Line in the past year, though they are not using it now.
- Another 8% of the respondents are potential riders who rode at some time between 2005 and 2008, but no longer do so.
- One third (33%) of the respondents are potential riders with no recent experience with B-Line at all.
- Finally, non-riders total 27% of the respondents and for the most part (22%) have no recent experience with B-Line at all.

Figure 8 Modal choice

Q43. Do you always have a vehicle available for your own use, or do you share a vehicle, or do you not have a vehicle?
(Source: BCAG e-Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
No vehicle	31%	5%	3%	11%
Share	16%	7%	5%	9%
Vehicle available	53%	88%	92%	80%

Modal choice

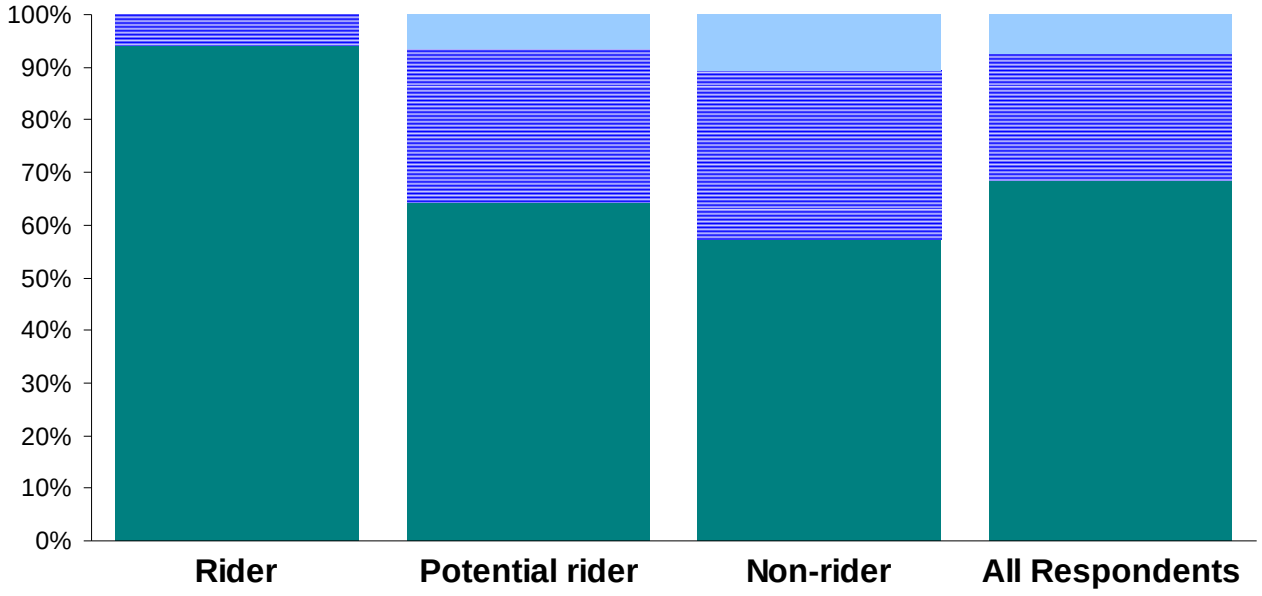
We have already shown that 24% of the respondents use B-Line at least once a month. Thus most of the respondents must use other modes. Also, because the definition of rider is minimal (once a month or more) many riders may also use other modes.

- Of all respondents, 80% own (or lease) a vehicle and do not have to share it.
- Another 9% share a vehicle with another person in the household.
- Finally, 11% lack a vehicle, rendering them transit-dependent.

As one would expect, potential riders are somewhat less likely (88%) – but only slightly -- than non-riders (92%) to have their own vehicles. Among the three market segments, B-Line riders are least likely to have a vehicle available to them (53%) and are more likely to have no vehicle (31%) or to share a vehicle (16%). Notice, however, that the fact that 53% of B-Line riders included in this survey population have a vehicle available means that a majority of them have a choice and are electing to use public transit.

Figure 9 Awareness of B-Line stop

Q20. Do you happen to know where the bus stop nearest to your home is located?
(Source: BCAG e-Survey, 2009)



	Rider	Potential rider	Non-rider	All Respondents
Not sure		7%	12%	8%
No	6%	31%	36%	26%
Yes	94%	69%	64%	74%

Awareness of the bus stop

Using the bus obviously requires knowing where the bus stop is located and being in reasonable proximity to it.

Of all respondents, 74% say they know where the stop nearest their home is located. Potential riders are only slightly more likely (69%) than non-riders (64%) to know. Conversely, 38% of the potential riders are either not aware of the stop location (31%) or are uncertain (7%).

As one would expect nearly all riders know where the stop nearest to home is located (94%), but 6% do not know. Presumably they use an aspect of service that does not involve travel near home.

Figure 10 Proximity of bus stop

Q21. Is it in walking distance?
(Includes only those who said they know where the stop is located.)

	B-Line Rider	Potential rider	Non-rider	All Respon-dents
Yes	87%	76%	89%	82%
No	13%	24%	11%	18%

Q22. About how many minutes would it take to walk to it? (Includes only those who said they know where the stop is located.)

	B-Line Rider	Potential rider	Non-rider	All Respon-dents
0 - 5 minutes	70%	61%	72%	67%
6 - 10 minutes	19%	25%	19%	22%
11 - 20 minutes	8%	11%	9%	10%
21 minutes or more	2%	3%	1%	2%
Mean:	5.8	7.2	5.7	6.4

Most respondents (82%) including potential riders (76%) and even more non-riders (89%), say the stop is within walking distance. Oddly, 13% of current B-Line riders say they do not know whether the stop is in walking distance, though they also say they know where it is.

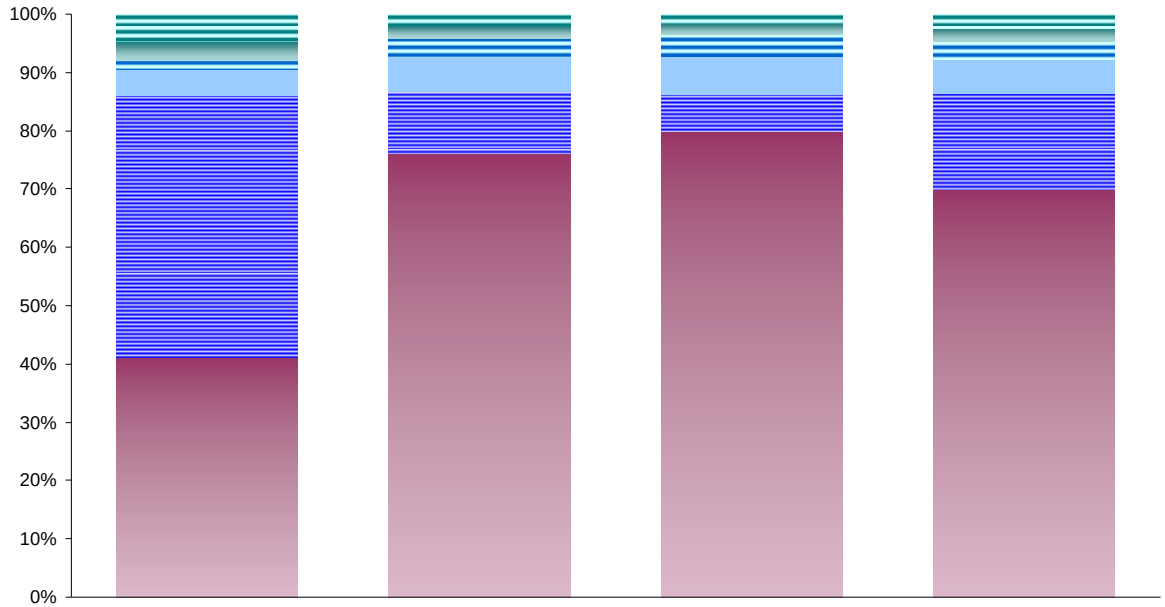
- It is also interesting that considerably more potential riders (24%) than non-riders (11%) or riders (13%) say the nearest stop is not within walking distance, though they say they do know where it is located. Proximity of the stop is apparently a barrier to the use of B-Line for almost one fourth of the potential commuting ridership represented in the e-survey.

- Approximately two-thirds (67%) of all respondents say the stop is within a five minute walk, while another 22% say it takes from six to ten minutes to walk to it, for a total of 89% saying they live within a ten minute walk of the nearest bus stop.

- It is interesting to note that fewer of the potential riders (61%) than of current B-Line riders (70%) say they live within five minutes of a stop, and more of potential riders (a total of 39%) than of riders (a total of 30%) say it would take them longer than five minutes to walk to the nearest stop. Proximity is not a barrier for most potential riders, but it appears to be for a substantial number of them.

Figure 11 Awareness of how to obtain information about B-Line

Q23. If you needed B-Line route and schedule information, where would you get it?
(Source: BCAG, B-Line e-Survey, 2009)



	Rider	Potential rider	Non-rider	All respondents
Ask bus driver	5%	2%	2%	2%
Go to bus stop	3%	2%	2%	2%
Other	2%	3%	4%	3%
Call B-Line	5%	6%	7%	6%
I have a bus schedule	45%	11%	6%	17%
Internet	41%	76%	80%	70%

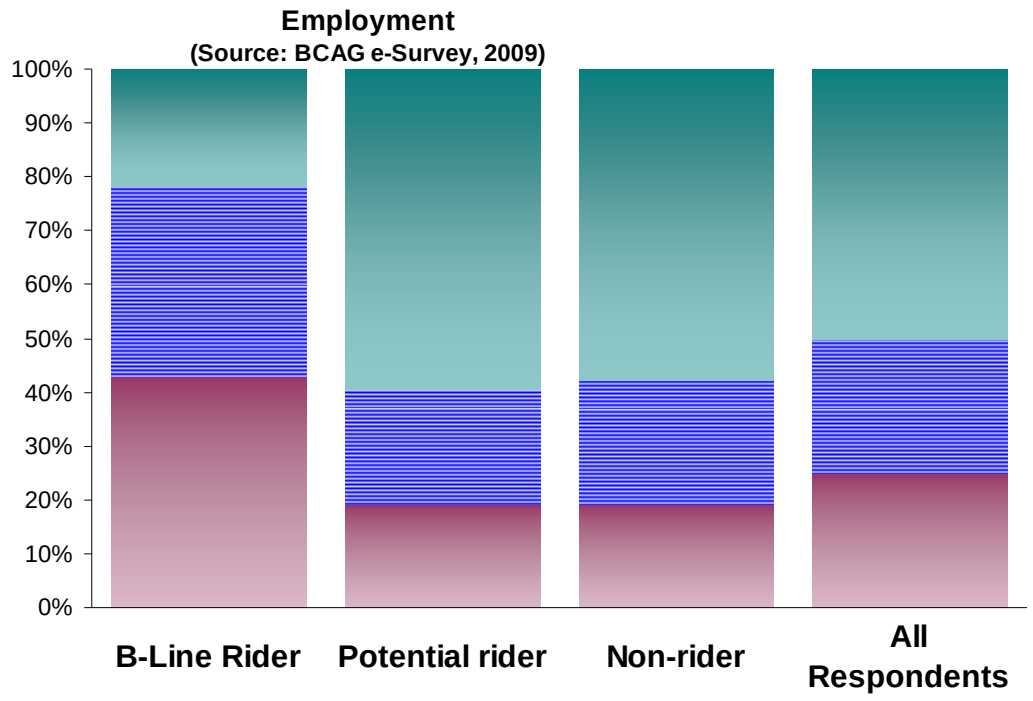
Likely means of obtaining information about B-Line

The Internet dominates the likely source of information for the respondents.

- Of all respondents, 70% say they would use the Internet to seek information about B-Line.
- This tendency varies among the segments, with 80% of non-riders citing the Internet, and a similar percentage (76%) of the potential riders citing it compared to only 41% of the current B-Line riders citing it as their source.
- Current riders are just as likely to say they have already obtained a schedule. It may be that this is an ordinal process – first make contact, and then obtain a schedule.
- Very few say they would call B-Line (6%) – the response which not long ago would have dominated responses to this question in most surveys.

Commuting

Figure 12 Employment profile



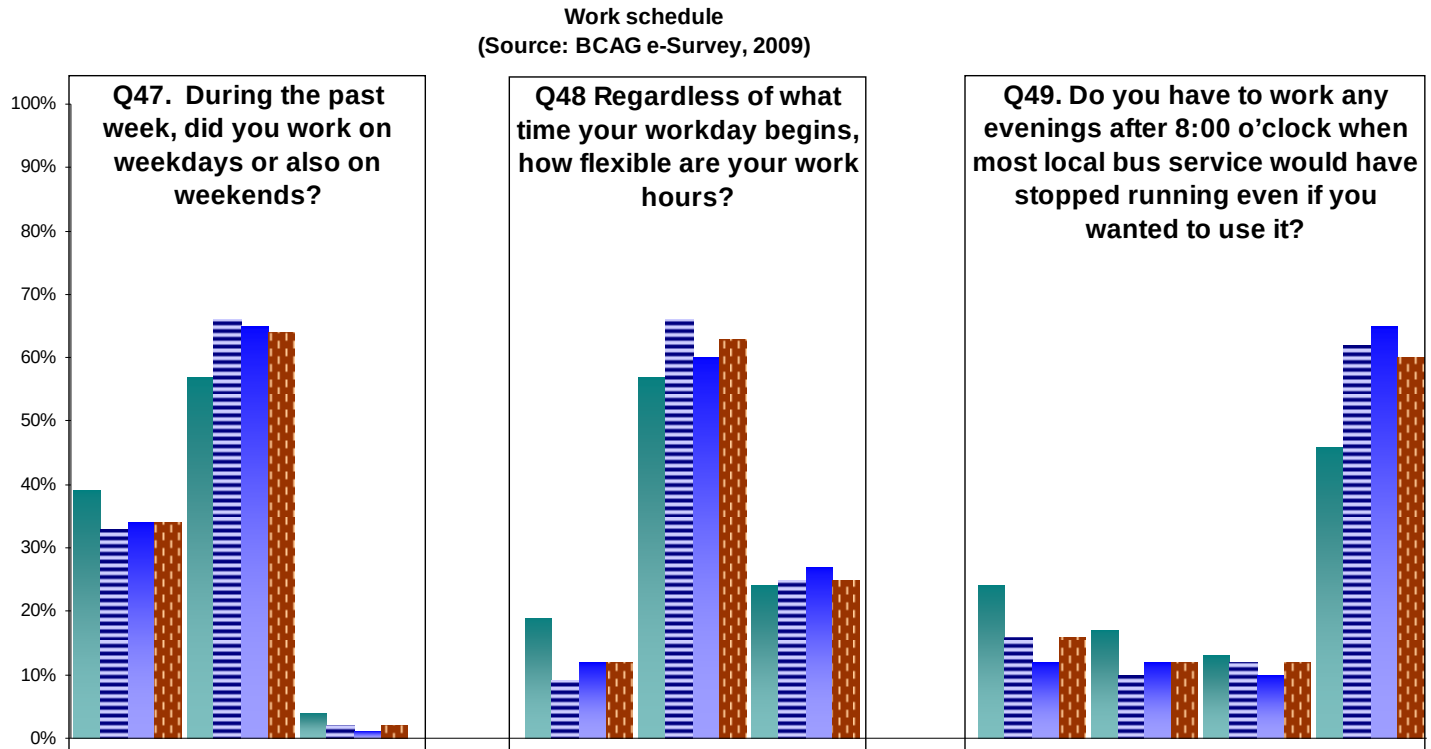
	B-Line Rider	Potential rider	Non-rider	All Respondents
Employed	22%	59%	58%	50%
Employed and student	35%	21%	23%	25%
Student only	43%	19%	19%	25%

Employment of the market segments

Since the e-survey was conducted through colleges and employers, it is by definition a commuter survey. This chart examines the type of commuting which each segment does.

- Of all respondents, 50% are employed, and another 25% are employed while attending school, for a total of 75% who must commute to work. Another 25% are students only and have to commute only to school.
- Potential riders and non-riders differ very little in this respect.
- B-Line riders, however, are much more likely (43%) than others (19%) to be students-only or employed students (35%) and much less likely (22%) than others to be employed and not a student. This is not surprising given the high level of student ridership which B-Line attracts.

Figure 13 Employment weekends and evenings



	Both	Only week-days	Only week-ends	I have no set schedule	I have a regular schedule	Hours req but can vary	Yes, every week	Yes, but only occasnlly	Yes, but only rarely	Never, or almost never
B-Line Rider	39%	57%	4%	19%	57%	24%	24%	17%	13%	46%
Potential rider	33%	66%	2%	9%	66%	25%	16%	10%	12%	62%
Non-rider	34%	65%	1%	12%	60%	27%	12%	12%	10%	65%
All Respondents	34%	64%	2%	12%	63%	25%	16%	12%	12%	60%

Employment profile in detail

Employed respondents (including employed students) were asked whether they had to work weekends and late evenings, and whether their work hours were at all flexible.

- Among all employed respondents, most work only weekdays (64%), but 36% say they sometimes or always work weekends. This is slightly more characteristic of the current riders (43%) than of the non-riders (35%) or potential riders (35%).

- Most employed respondents have a regular work schedule (63%), but a substantial number have either some flexibility (25%) or no set schedule at all (12%).
- Most employed respondents (60%) do not have to work after 8:00 pm, however about one in six (16%) have to work that late every week. B-Line riders are more likely (24%) than employed potential riders (16%) or non-riders (12%) to have to work late hours. This would suggest that current riders would put a premium on maximum evening service.

Figure 14 Location of workplace / school

Q12. In what city or town is your place of employment or school located?

Location of workplace or school	B-Line Rider	Potential rider	Non-rider	All respondents
Chico	72.0%	63.5%	74.0%	68.0%
Oroville	17.7%	21.6%	13.8%	18.7%
Butte College Main Campus	2.5%	7.2%	4.0%	5.5%
In another city or town	2.8%	3.2%	2.0%	2.8%
Paradise	3.3%	2.6%	1.7%	2.5%
Yuba City	1.0%	0.1%	1.2%	0.6%
Gridley	0.3%	0.3%	0.8%	0.4%
Sacramento	0.0%	0.4%	0.5%	0.4%
Durham	0.0%	0.4%	0.7%	0.4%
Orland	0.0%	0.1%	0.7%	0.2%
Biggs	0.0%	0.2%	0.0%	0.1%
Magalia	0.0%	0.2%	0.2%	0.1%
Not sure	0.3%	0.0%	0.2%	0.1%
Forest Ranch	0.0%	0.2%	0.2%	0.1%
In one of these, but will not say which	0.3%	0.0%	0.0%	0.0%

Employment locations

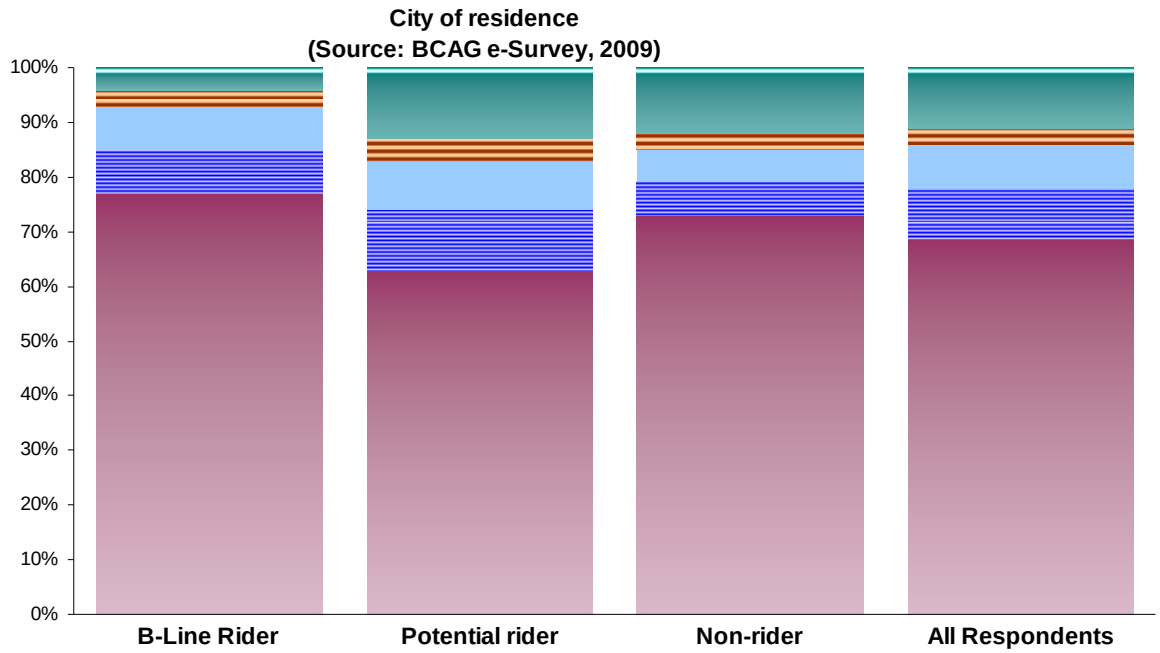
Employed respondents were asked where their workplace was located.

Because of the participation of certain employers in the survey process (see page 7), more of the employed persons are employed in Chico (68%) than elsewhere. This is less true of potential riders (63.5%) than of non-riders (74%) or riders (72%).

The difference is that more of the potential riders are employed in Oroville (21.6%) or at the Butte College main campus (7.2%).

Only a small number of the respondents say they work in the smaller localities.

Figure 15 City of residence



	B-Line Rider	Potential rider	Non-rider	All Respondents
Biggs	0%	0%	0%	0%
Gridley	1%	1%	1%	1%
In another city or town	3%	12%	11%	10%
Magalia	3%	4%	3%	3%
Oroville	8%	9%	6%	8%
Paradise	8%	11%	6%	9%
Chico	77%	63%	73%	68%

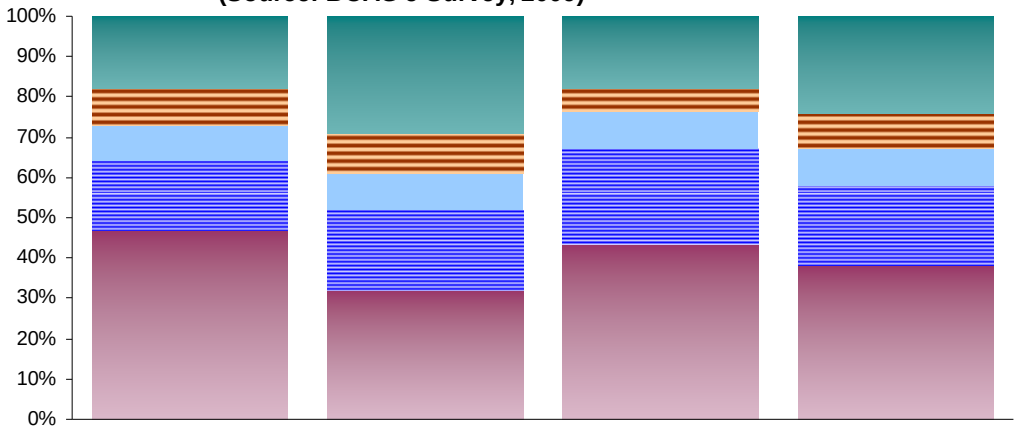
City of residence

Of all respondents, 68% live in Chico.

- 63% of potential riders live in Chico, but that is fewer than for non-riders (73%) or current riders (77%).
- The difference is that more of the potentials than non-riders live in Paradise or Oroville.
- Also, in comparison to current riders, more potential riders (17% v 7%) live in the smaller communities of the county.

Figure 16 Travel among Butte County cities

Q18. In the typical week, on how many days, if at all, do you travel from one city to another among Chico, Oroville and Paradise for any reason?
(Source: BCAG e-Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
Five or more	18%	29%	18%	24%
Three or four	9%	10%	6%	9%
One or two days	9%	9%	9%	9%
Less than once a week	17%	20%	24%	20%
Never / None at all	47%	32%	44%	38%

Travel among Butte County cities

Because B-Line operates among local cities within Butte County, it is important to understand how often people travel among those cities.

- Only 38% of all respondents say they do not travel among area cities at all, while 24% say they do so on five or more days a week.
- Potential riders travel intercity (total of 68%) more often than non-riders (total of 56%).
- Potential riders (39%) are substantially more likely than non-riders (24%) to travel intercity three or more days a week.

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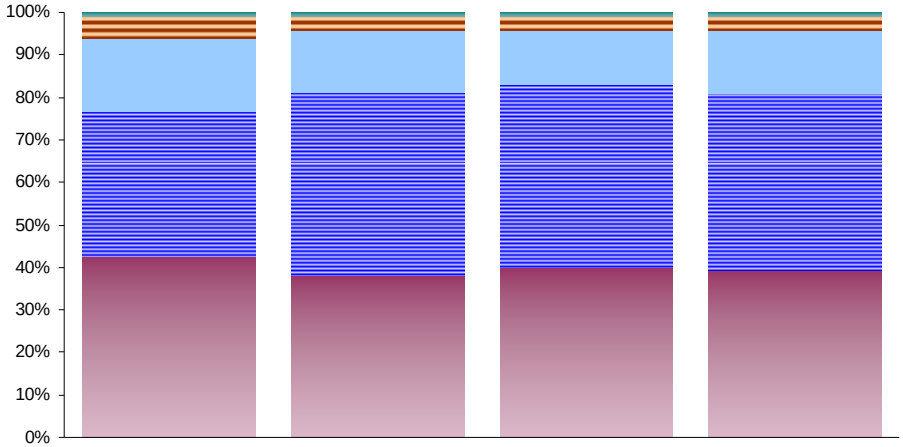
Figure 17 Travel to Sacramento

Q19. In a typical month, on how many days, if at all, do you go to Sacramento?
(Source: BCAG e-Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
Daily	0%	0%	0%	0%
Five or more days a month	1%	1%	1%	1%
Three or four days a month	5%	3%	3%	3%
One or two days a month	17%	15%	13%	15%
Less than once a month	34%	43%	43%	41%
None at all	42%	38%	40%	39%

Travel to Sacramento

Travel to Sacramento is infrequent for these respondents.

- 39% say they do not go to Sacramento in a typical month at all.
- This tendency varies very little among the three market segments.

Figure 18 Basic origin-destination commuting patterns

Basic commuting patterns for those who are employed or students

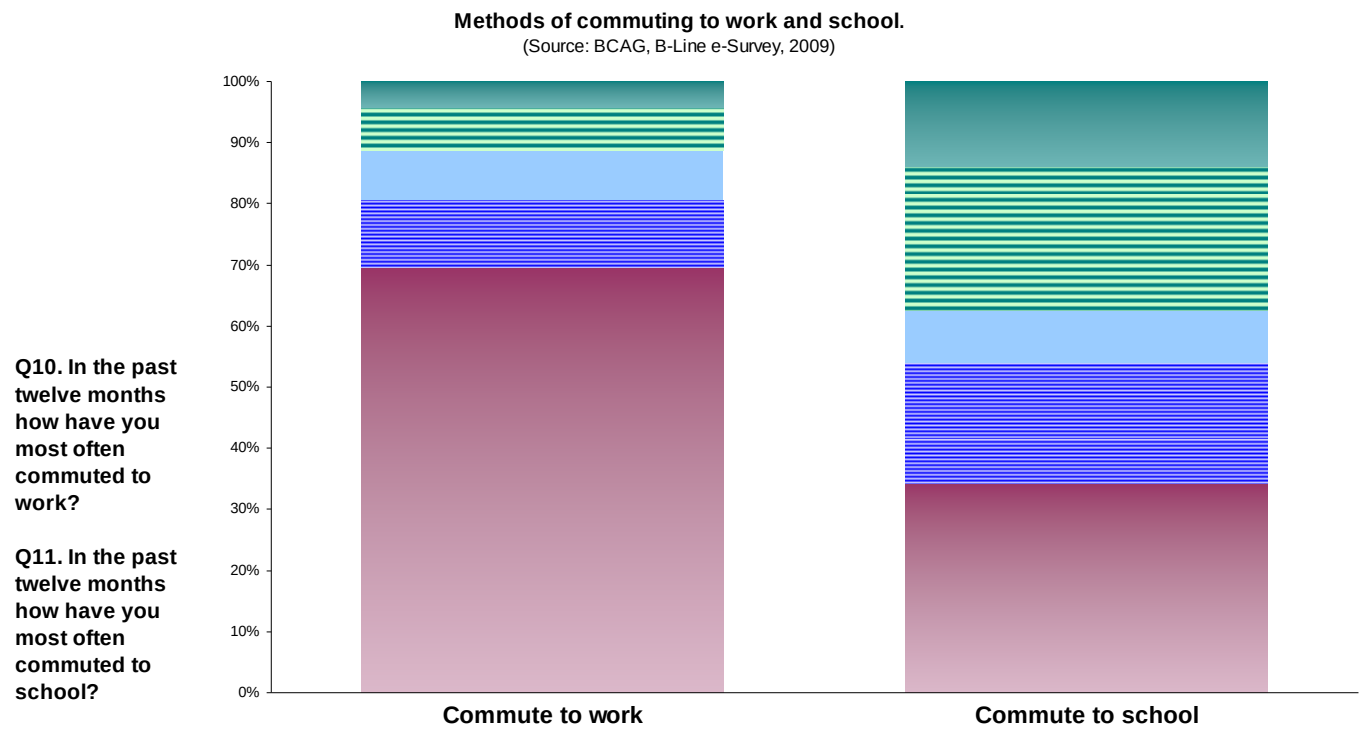
	City of residence						
City of work or school	Chico	Paradise	Oroville	Magalia	In another city or town	Gridley	Biggs
Chico	55.9%	3.9%	2.0%	1.3%	4.9%	0.3%	0.0%
Oroville	6.6%	2.6%	4.7%	1.0%	1.4%	0.6%	0.1%
Paradise	0.3%	1.4%	0.1%	0.1%	0.1%	0.0%	0.0%
In another city or town	1.2%	0.1%	0.0%	0.1%	2.1%	0.0%	0.0%
Butte College Main Campus	4.1%	1.1%	1.1%	0.6%	1.0%	0.2%	0.0%
Magalia	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Gridley	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Sacramento	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Biggs	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%

Basic origin-destination commuting patterns

The origin/destination table shown here demonstrates the percentage of all commuters who travel within or between various communities for work or school.

The percentages are "table percentages," meaning that the denominator consists of all respondents who provided both origin and destination information about their commute. That is, the percentages sum to 100% through the entire table, not for each column. For example, 55.9% of all respondents say they travel primarily within Chico, while another 4.7% of all respondents travel within Oroville.

Figure 19 Usual mode of commuting to work or to school



Q10. In the past twelve months how have you most often commuted to work?

Q11. In the past twelve months how have you most often commuted to school?

	Commute to work	Commute to school
Walk	4%	13%
Public transit	7%	23%
Car pool or van pool	8%	8%
Bicycle	11%	19%
Drive alone	70%	33%

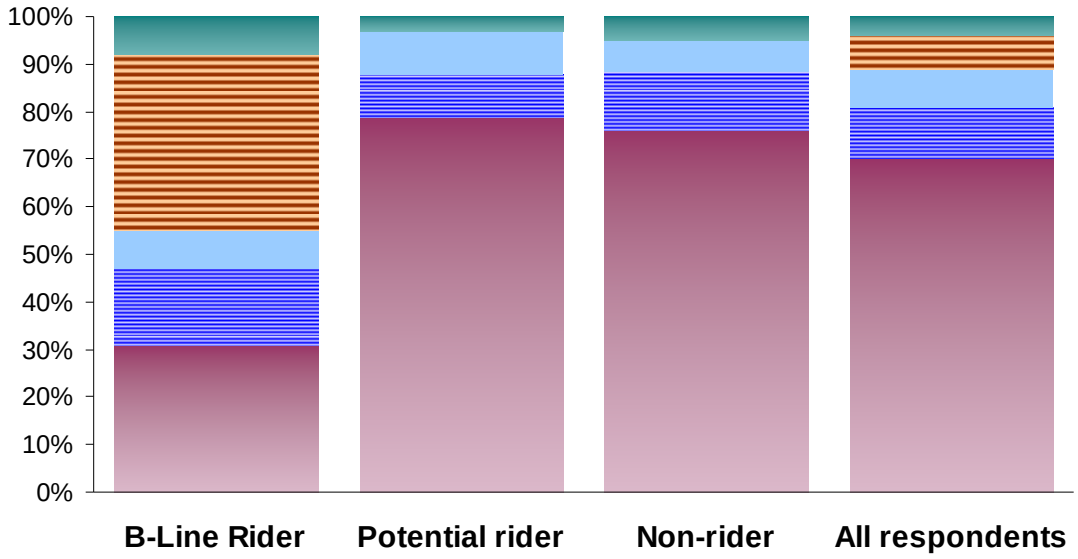
Usual mode of commuting to work or to school

The commuting market consists of both workers and students. The college student market often lives in close proximity to campus or on campus. Also they tend to have less money than employed persons in general. Thus student travel practices are quite different than those of employed persons.

- While 70% of those who commute to work commute by single occupancy vehicle (SOV), only 33% of those who commute to school say this.
- Conversely, while 23% of those who commute to school say they use public transit, only 7% of those commuting to work say this.
- There is a surprisingly high level of bicycle use for commuting among these respondents, with 11% of those who commute to work saying they use a bicycle to commute and 19% of students saying they bike.

Figure 20 Primary mode of commuting to work

Q10. In the past twelve months, how have you most often commuted to work? (Source: BCAG e-Survey, 2009) Respondents who are employed or both students and employed (i.e. does not include students-only)



	B-Line Rider	Potential rider	Non-rider	All respondents
Walking	8%	3%	5%	4%
Public transit	37%	0%	0%	7%
Car pooling (or van pooling)	8%	9%	7%	8%
Bicycle	16%	9%	12%	11%
Driving alone all the way	31%	79%	77%	70%

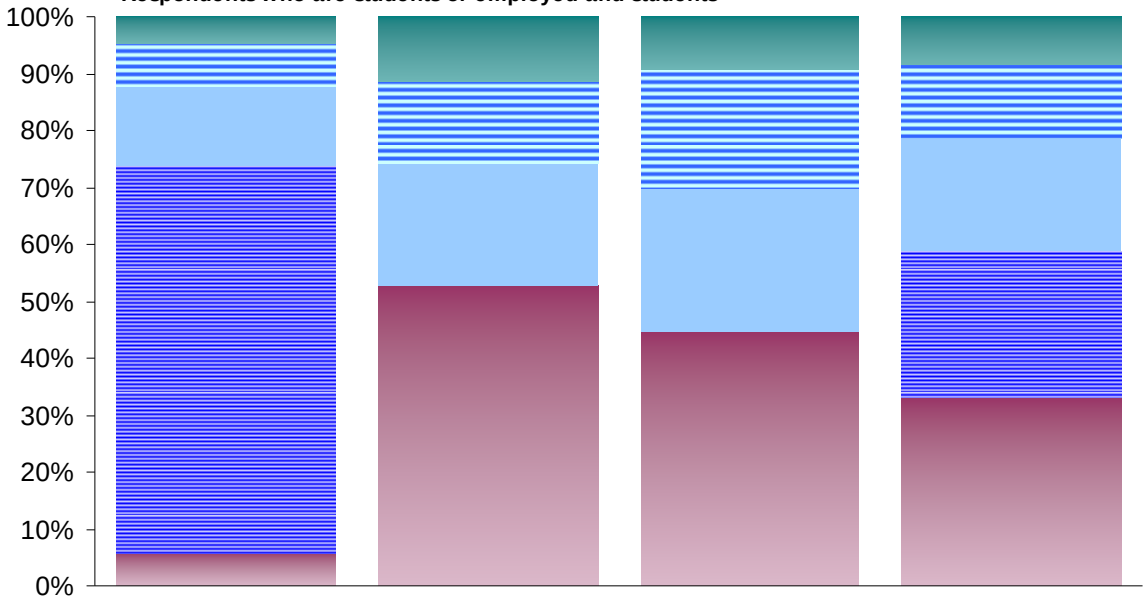
Primary mode of commuting to work

- Commuting *via* SOV is the primary method Butte County residents use to commute to work (70%).
- Potential riders (79%) and non-riders (77%) are similar in their SOV preference, with nearly 80% of each of these groups utilizing this method.
- Among those who are classified as B-Line Riders, nearly one-third still consider driving alone to be their primary mode of commuting.
- Overall, bicycling to work is the second most popular mode of commuting to work in Butte County.
- Using public transit is the 4th most popular mode of commuting to work, following car pooling or van pooling.

- Only 37% of current B-Line Riders captured in this survey consider B-Line as their primary mode for getting to and from work.
- Nearly one-quarter of B-Line Riders bicycle or walk to work primarily; it is reasonable to conclude, then, that for these commuters, B-Line is an alternative in poor weather or situations outside of their normal daily routine.

Figure 21 Primary mode of commuting to school

Q11. In the past twelve months how have you most often commuted to school?
(Source: BCAG e-Survey, 2009)
Respondents who are students or employed and students

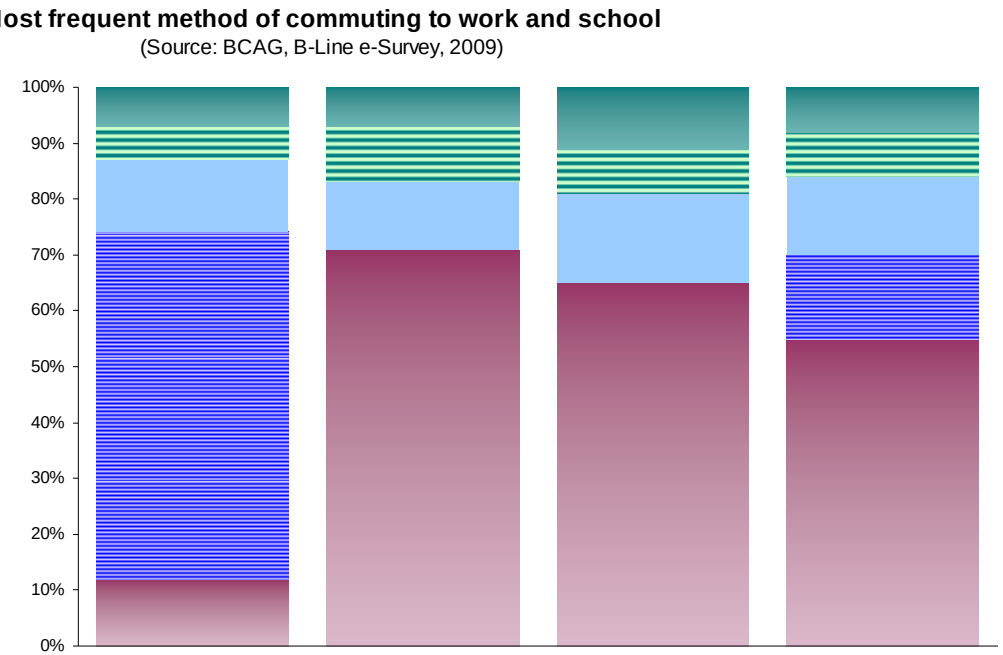


	B-Line Rider	Potential rider	Non-rider	Total, 2009
Car pooling (or van pooling)	5%	11%	9%	8%
Walking	8%	15%	21%	13%
Bicycle	14%	22%	25%	20%
Public transit	68%	0%	0%	26%
Driving alone all the way	6%	53%	45%	33%

Primary mode of commuting to school

- When commuting to school, traveling via SOV is the most common mode (33%), followed closely by using public transit (26%).
- Bicycling (20%) and walking (13%) are also popular among students, with one-third of those who commute to school indicating one of these as their primary mode.
- Car pooling or van pooling is the least utilized mode of commuting to school (8%).
- Among current B-Line Riders, the vast majority use B-Line as their primary mode of commuting to school (68%).

Figure 22 Primary mode of commuting to work or to school



	Rider	Potential rider	Non-rider	All respondents
Walking	7%	7%	11%	8%
Car pooling (or van pooling)	6%	10%	8%	8%
Bicycle	13%	12%	16%	14%
Public transit	63%	0%	0%	15%
Driving alone all the way to work	12%	71%	65%	55%

Primary mode of commuting to work or to school

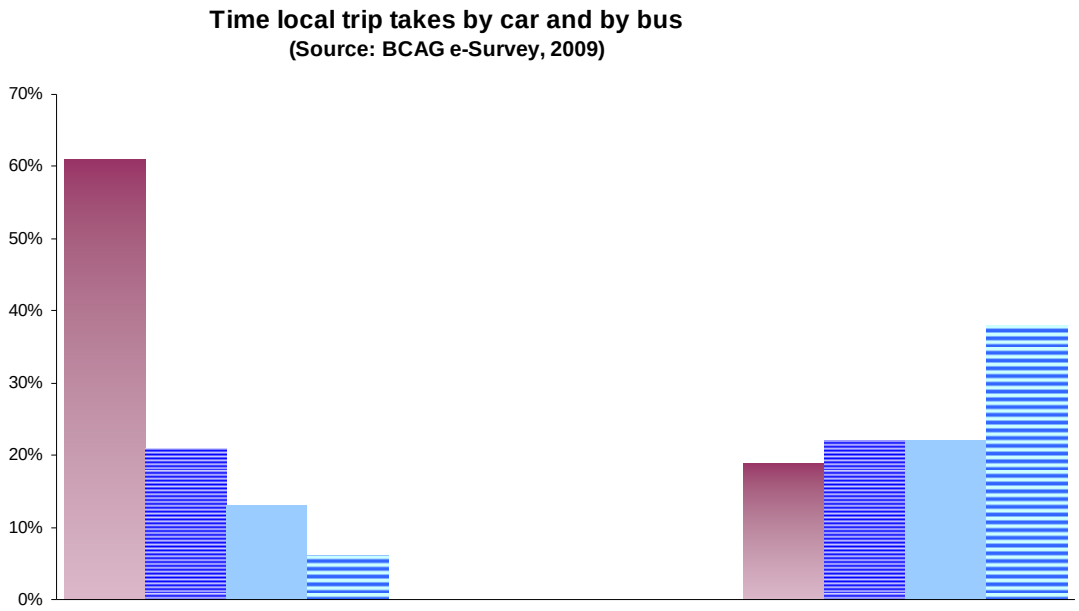
In this chart, we now combine trips for work or for school. For those who are employed students, we give priority to the work-trip mode.

All respondents are commuters to work or school or both. The chart shows the modes by which they commute.

- As one would expect, the dominant mode (55%) is the single occupancy vehicle. That is not surprising.
- What is more interesting is the extent of commuting by modes other than driving among the non-riders and potential riders. For example, 12% of potential riders and 16% of non-riders bicycle, while 10% and 8% (respectively) carpool, and 7% and 11% walk (respectively).

All travel patterns, including non-commuting travel

Figure 23 Time usual trip takes by car or by bus (all respondents)



	By car	By bus
15 min or less	61%	19%
16 - 25 min	21%	22%
26 - 35 min	13%	22%
36 min or more	6%	38%

Time usual trip takes by car or by bus

Respondents were asked to estimate the time their usual trip (including either commuting or another type of trip – whatever is most frequent) takes by car and how long they believe it would take if they traveled by B-Line.

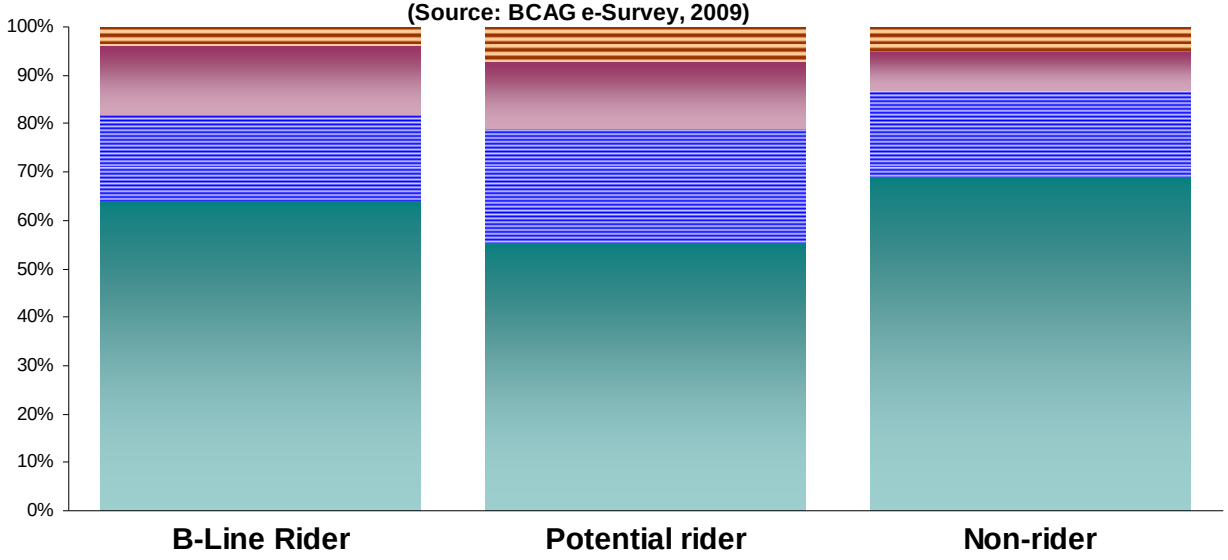
- Sixty-one percent (61%) of all respondents indicated that their trips by car within the service area take 15 minutes or less. Another 21% say that their trip takes 16 to 25 minutes, but only 6% say it takes 36 minutes or more.
- On the other hand, by bus, only 19% say that the trip takes only 15 minutes or less, while 38% say it takes 36 minutes or more.

The two charts that follow add detail to these findings by showing separately the perceived time by car and the time by bus, grouped, and broken down by market segment, and limiting the data to only those able to provide the requested estimates of time for the trips.

Figure 24 Time usual trips takes by car (by market segment)

Q15. Consider the local area trip you take more often than any other local trip in the area, whether commuting or other reasons, about how long does it normally take by car?*

(Source: BCAG e-Survey, 2009)



	B-Line Rider	Potential rider	Non-rider
36 min or more	4%	7%	5%
26 - 35 min	14%	14%	8%
16 - 25 min	18%	23%	18%
15 min or less	64%	55%	69%

* Question paraphrased.

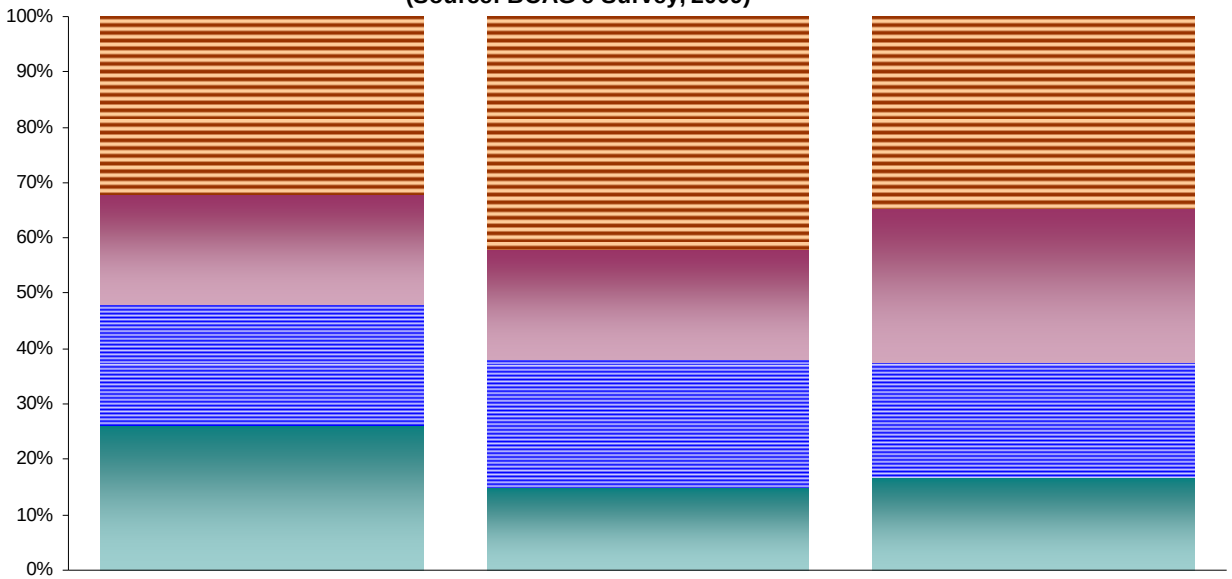
Time usual trip takes by car

The local automotive trips of non-riders appear on the whole to be slightly shorter than those of the potential riders.

- Of the potential riders, 55% take 15 minutes or less, but for 69% of non-riders they take that short a time.
- Most local car trips, however, take 15 minutes or less, a fact that makes competing with SOV travel very difficult indeed.

Figure 25 Time usual trip takes by bus (by market segment)

Q16. If you made that same local trip by B-Line, about how long do you think it would normally take?
(Source: BCAG e-Survey, 2009)



	B-Line Rider	Potential rider	Non-rider
36 min or more	32%	42%	35%
26 - 35 min	20%	20%	28%
16 - 25 min	22%	23%	21%
15 min or less	26%	15%	17%

Time usual trip takes by bus

The non-rider and potential-rider market segments differ, but not drastically, in their perceptions of the time their local trips would take by bus. For example:

- 17% of non-riders say the trip would take 15 minutes or less compared to 15% of potential riders.
- Also, while a total of 63% of non-riders think the bus trip would take 26 minutes or more, 69% of the potential riders perceive that it would.
- Potential riders are the most pessimistic about bus travel times, with 42% thinking their trip would take 36 minutes or more.

- The current B-Line riders, who have the most actual experience using the bus, generally are more optimistic about bus travel times. More than a quarter (26%) say their usual trips take 15 minutes or less, while only 15% of potential riders are this optimistic. Also, a total of only 52% of B-Line riders say that the bus trip takes 26 minutes or more compared to 63% of the non-riders and 69% of the potential riders. Either the non-riders and potential riders are perceptually exaggerating the duration of their hypothetical B-Line trips, or the respondents who use B-Line do so in part because their trips are brief. Or both may be true.

Figure 26 Mean time for trip by car and by bus

Estimated trip times

	Time by car	Time by bus	Ratio (bus/car)
B-Line Rider	16	31	1.9 : 1
Potential rider	19	36	1.9 : 1
Non-rider	16	34	2.1 : 1
Total	17	34	2.0 : 1

Mean perceived trip duration and time-ratios

Here we are concerned with three things:
(1) The mean perceived duration of the trips,
(2) The range of the means, and
(3) The ratio of the means.

The ratios of perceived time by car and time by bus are as important to customer behavior as the absolute times. Typically, those most willing to consider using public transit perceive the ratio of time-by-transit to time-by-car be slightly less than 2:1 for their typical trips.

- Duration: It is interesting that for potential riders, the average time for a local trip by car is thought to be about 19 minutes, but for the other segments is thought to be three minutes shorter (16 minutes).

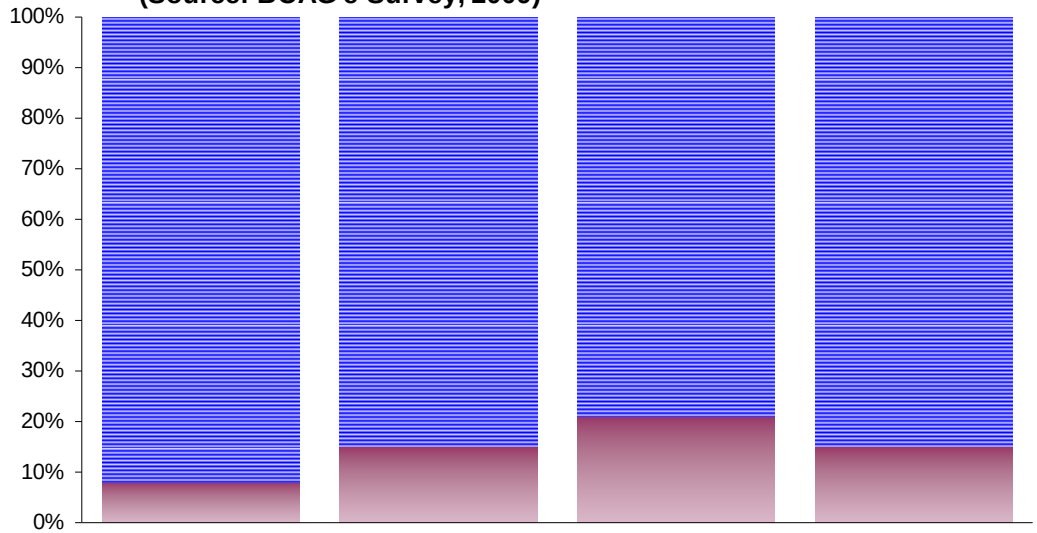
- Range: The range of perceived time by car is only from 16 minutes to 19 minutes, a range of only three minutes. On the other hand, the trips by bus range from 31 minutes to 36 minutes, a range of five minutes.

- Ratio: The average time by bus is perceived to be 34 minutes for all respondents, roughly twice as long as the time by car (17 minutes). For non-riders the averages are 16 minutes and 34 minutes respectively, a ratio of approximately 2:1. For potential riders as well as for current riders, the ratio is 1.9:1, a fact that illustrates the power of the ratio of less than 2:0.

Figure 27 Having to drop children off during commute

Q45. As part of your daily routine, do you have to drop kids off at child care or school?

(Source: BCAG e-Survey, 2009)



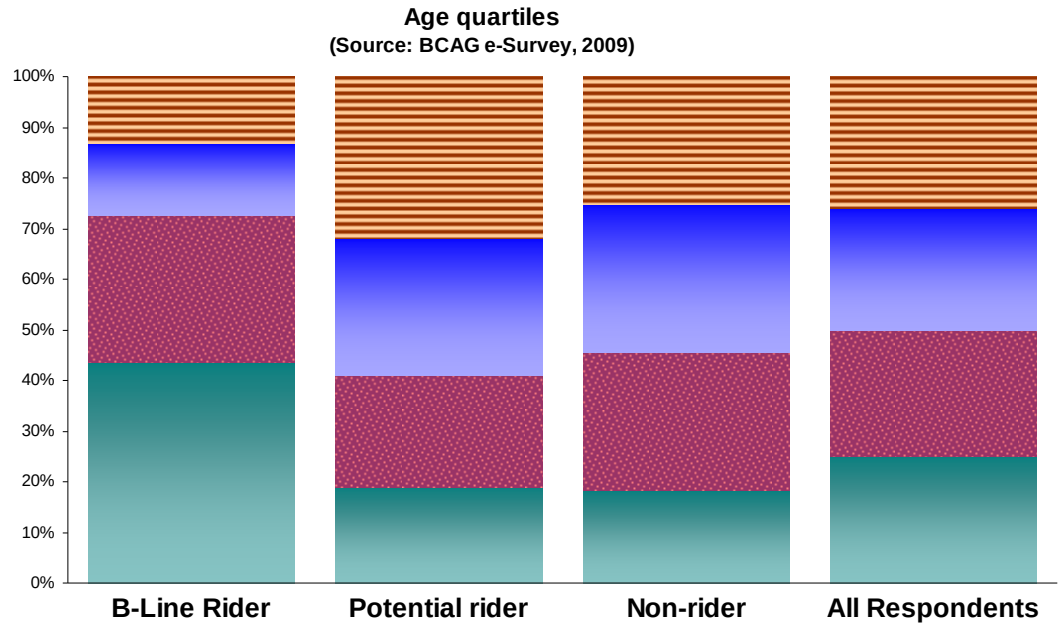
	B-Line Rider	Potential rider	Non-rider	All Respondents
Do not need to drop children off	92%	85%	79%	85%
Must drop children off	8%	15%	21%	15%

Having to drop children off during commute

Most respondents (85%) do not have to drop off children at school or day care. However, this means that 15% do have to do so, a fact that severely limits their possibility of using transit or other alternative modes to commute.

Demographics

Figure 28 Age of the market segments



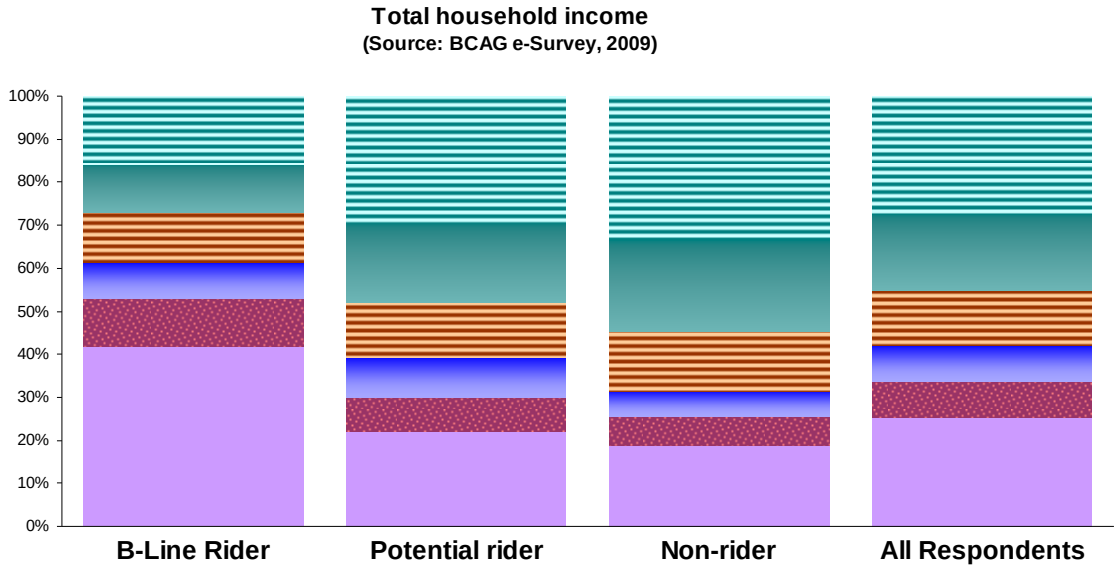
	B-Line Rider	Potential rider	Non-rider	All Respondents
52 years and over	13%	32%	25%	26%
35 to 51 years	14%	27%	29%	24%
23 to 34 years	29%	22%	27%	25%
18 to 22 years	43%	19%	18%	25%

Age of the market segments

Age groups were divided into approximate quartiles. The respondents in the e-survey are younger than respondents in the companion telephone survey since they are, by definition, either students or employed persons and include no retired persons.

- The youngest age quartile is from 18 to 22 years old.
- The percentage of potential riders and non-riders in the youngest age groups is similar (18% and 19% respectively), but a much higher percentage of riders falls into this age group (43%). This is typical of ridership in general since ridership is income-related and income is age-related (younger people earn less).
- Conversely, the older a respondent is, the less likely he or she is to be a current rider.
- Although more of the potential riders are in the older quartiles (e.g. 32% are 52 or older compared to 13% of current riders), the fact that ridership is income-related suggests that the younger potential riders would provide the more productive target for marketing.

Figure 29 Income of the market segments



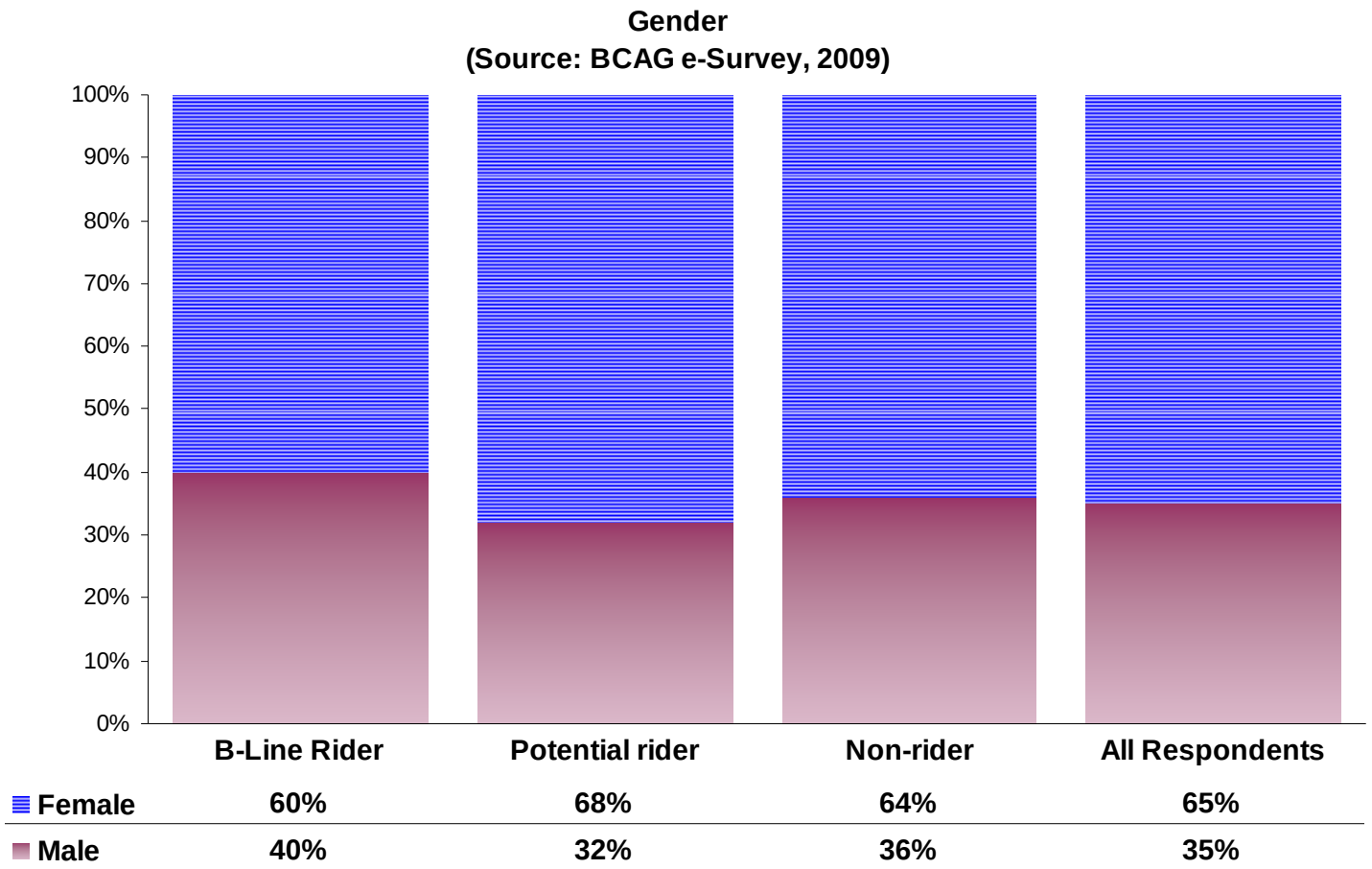
	B-Line Rider	Potential rider	Non-rider	All Respondents
$75,000 or more	16%	29%	33%	28%
$50,000 to $74,999	11%	19%	21%	18%
$35,000 to $49,999	12%	13%	14%	13%
$25,000 to $34,999	8%	9%	6%	8%
$15,000 to $24,999	11%	8%	7%	8%
Less than $15,000	42%	22%	19%	25%

Income of the market segments

Potential riders and non-riders differ slightly in terms of income, but they differ greatly from current riders.

- Among all respondents, 25% indicate their household incomes are less than $15,000. In this regard we must remember that many respondents are college students.
- Current riders are much more likely (42%) than the potential riders (22%) to report incomes of less than $15,000 and much less likely (16%) than potential riders (29%) to report incomes of $75,000 or more.
- As with age, the most productive targets among the potential riders should be those who are most like current riders – i.e. of modest income.
- However, there is also clearly an upper crust of potential riders with incomes of $35,000 or more who are middle to upper-middle class and therefore are likely to have modal choice and demand superior service.

Figure 30 Gender of the market segments



Gender of market segments

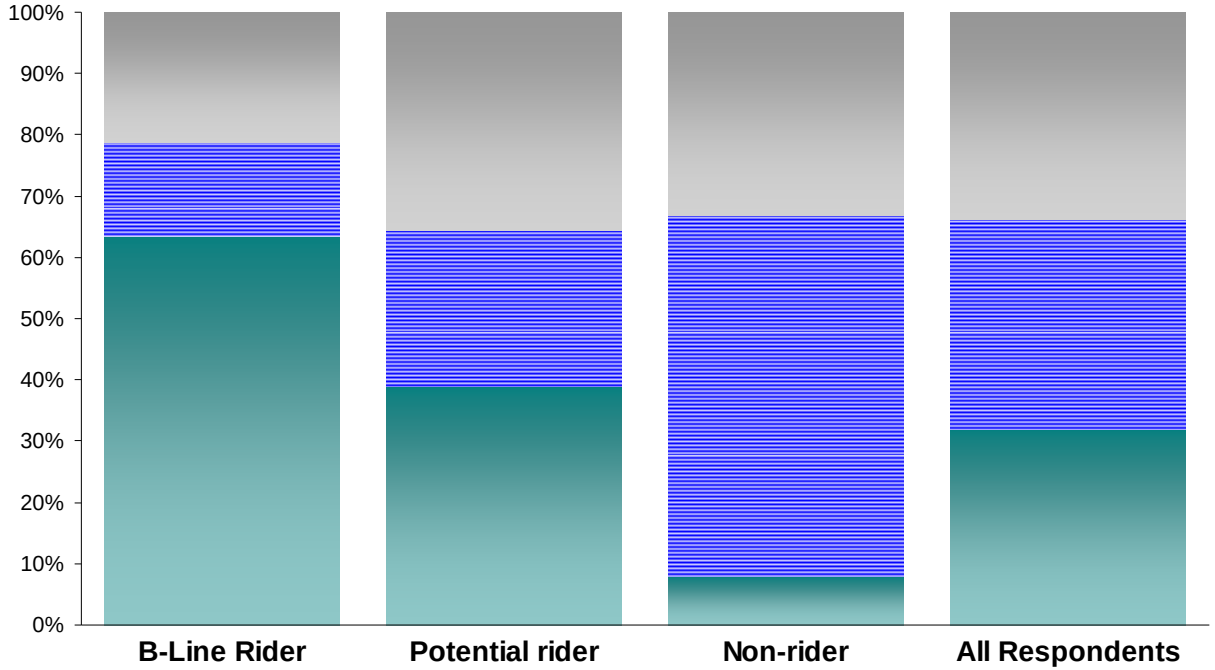
Respondents to the e-Survey were more likely to be women than men. We do not know the gender make-up of the total employee base in the area. As a result, we do not know whether this balance is representative of all area employees, or whether there is a tendency for women to be more likely than men to have desk jobs with email access, or whether women in the area are simply more likely to respond to such surveys.

In any event there is relatively little difference among the market segments in terms of gender, though the B-Line riders are somewhat more likely to be male than the other segments are.

Perceptions of B-Line, and trade-off preferences if B-Line alters services

Figure 31 Would it be convenient to use B-Line?

Q38. Do you feel that using the B-Line buses on a regular basis would be convenient or inconvenient for you?
(Source: BCAG e-Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
Not sure	21%	36%	33%	34%
Inconvenient	15%	25%	59%	34%
Convenient	64%	39%	8%	32%

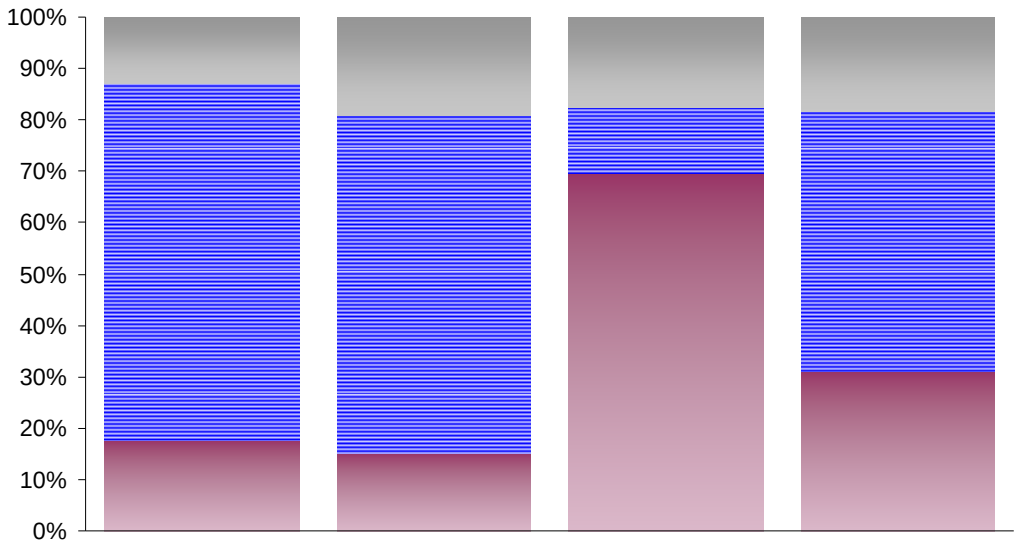
Perceived convenience of using B-Line

Respondents were asked if they felt that using B-Line regularly would be convenient for them or not. All respondents divided almost exactly into thirds in their responses.

- As one would expect riders (many of whom are only occasional users) are most likely to say it would be convenient (64%) compared to 39% of potential riders.
- The fact that 39% of potential riders feel it would be convenient means that the balance (61%) are somewhat reluctant potential riders who either feel it would not be convenient (25%) or are unsure.
- Clearly, many more of the potential riders (39%) than non-riders (8%) feel it would be convenient to use B-Line.

Figure 32 Self-reported likelihood of using B-Line in coming year

Q39. Which of these statements describes you better?
(Source: BCAG e-Survey, 2009)



	B-Line Rider	Potential rider	Non-rider	All Respondents
Not sure (vol)	13%	19%	18%	18%
With major improvements, it's likely I would try to use it in the coming year	70%	66%	13%	51%
Realistically, no matter how many improvements they make to B-Line service, you are not going to use it regularly	18%	15%	70%	31%

If B-Line made major improvements, do respondents believe they would use it?

When asked whether they would realistically be likely to "try to use B-Line" (or, in the case of riders, use it more often) in the coming year:

- 51% of the respondents say they would
- 31% say they clearly would not
- 18% are not sure.

Potential riders are especially responsive to the idea of trying B-Line if major service improvements were made (66% positive response). This response suggests a real receptivity to public transit in the potential rider market segment.

Figure 33 Service trade-offs – Chico residents only

Service improvement choices for Chico residents

	A	Prefer A	Prefer B	B
Q27	Local buses in Chico could run weekdays only from 6 a.m. to 10 p.m.	58%	42%	Local buses in Chico could run seven days a week from 7 a.m. to 6 p.m.
Q28	Buses in Chico could run every 30 minutes throughout the day on weekdays only.	54%	46%	Buses in Chico could run every 60 minutes, seven days a week, with 30 minute service only during commute hours on weekdays.
Q29	Buses in Chico could run every 60 minutes from 6 a.m. to 10 p.m.	39%	61%	Buses in Chico could run every 30 minutes from 7 a.m. to 6 p.m.
Q30	More routes and more buses operating on local routes within Chico.	78%	22%	More buses on regional routes connecting Chico with the other communities in Butte County.
Q31	Bus routes that run every 60 minutes and get you to your destination without transferring.	55%	45%	Bus routes that run every 30 minutes but require you to transfer to complete your trip.

Service trade-offs – Chico residents only

Respondents were asked to make choices between two service-related alternatives within each of five sets. The choices were varied depending on the respondent's location. Residents of Chico were asked one set and residents of other parts of the service area, a similar set that differed in several respects. However, with one major exception, the responses follow the same general pattern of offering different levels of service defined by hours or days of service and frequency of service.

We will examine first the choices offered Chico residents. The choices are shown in the table above along with the percentages of the total sample that chose each alternative. Specifically:

- Earlier and later hours of service are preferred by more people (58%) than seven day service (Q27). This is the opposite of the direction of preference of the general public found in the telephone survey.
- Weekday-only 30 minute service is preferred by 54% of respondents over seven days of 60 minute service plus 30 minute service in weekday peaks (Q28). This is the opposite of the direction of preference of the general public found in the telephone survey.

- When variable days of service are not included in the choice, more frequent service (Q29) is preferred by 61% over longer hours of service. This is the same direction of preference of the general public found in the telephone survey.
- More local service in Chico trumps more regional service (78%) (Q30) just as it did in the telephone survey.
- Most people (55%) prefer to avoid transfers (Q31) even at the cost of less frequent service as was also true in the telephone survey.

Figure 34 Service trade-offs in areas other than Chico

Service improvement choices for residents of Butte County, not including Chico

	A	Prefer A	Prefer B	B
Q33	Local buses could run weekdays only from 6 a.m. to 10 p.m.	66%	34%	Local buses could run seven days a week from 7 a.m. to 6 p.m.
Q34	Buses could run every 60 minutes throughout the day on weekdays only.	59%	41%	Bus could run every two hours, seven days a week, with 60 minute service only during commute hours on weekdays.
Q35	Buses could run every two hours from 6 a.m. to 10 p.m.	39%	61%	Buses could run every 60 minutes from 7 a.m. to 6 p.m.
Q36	More routes and buses operating on local routes within your community.	30%	70%	More buses on regional routes connecting your community with the other communities in Butte County.
Q37	Bus routes that run every 90 minutes, and get you to your destination without transferring.	57%	44%	Bus routes that run every 60 minutes but require you to transfer to complete your trip.

Service trade-offs in areas other than Chico

- Earlier and later hours of service are preferred by more people (66%) than seven day service (Q33). This is the opposite of the direction of preference of the general public found in the telephone survey but the same as Chico residents in the e-survey.
- Weekday-only 30 minute service is preferred by 59% of respondents over seven days of 60 minute service plus 30 minute service in weekday peaks (Q34). This is the opposite of the direction of preference of the general public found in the telephone survey but the same as Chico residents in the e-survey.
- When variable days of service are not included in the choice, more frequent service (Q35) is preferred by 61% over longer hours of service. This is the same direction of preference of the general public found in the telephone survey and among Chico residents in the e-survey.
- Outside of Chico, more regional service trumps more local service (70%), (Q36) just as it did in the telephone survey.
- Most people (57%) prefer to avoid transfers (Q37) even at the cost of less frequent service as was also true in the telephone survey and among Chico residents in the e-survey.

Figure 35 Comprehensive view of trade-offs

Trade-offs by Comparison Groups

		B-Line Rider (24%)	Potential rider (49%)	Non-rider (27%)	Employed (50%)	Employed and student (25%)	Student only (25%)	Travel within home community (64%)	Travel among communities (36%)	Not likely to use B-Line (31%)	Likely to use with improvements (51%)	All Respondents
Chico Respondents												
Q27.	A Local buses in Chico could run weekdays only from 6am to 10pm	62%	60%	53%	59%	60%	56%	59%	57%	52%	62%	58%
	B Local buses in Chico could run seven days a week from 7am to 6pm	38%	40%	47%	41%	40%	44%	41%	43%	48%	38%	42%
Q28.	A Buses in Chico could run every 30 minutes throughout the day on weekdays only	53%	57%	51%	51%	55%	60%	56%	45%	52%	55%	54%
	B Buses in Chico could run every 60 minutes, seven days a week with 30 minute service only during commute hours on weekdays	47%	43%	49%	49%	46%	40%	44%	55%	48%	45%	46%
Q29.	A Buses in Chico could run every 60 minutes from 6am to 10pm	45%	35%	41%	37%	45%	38%	37%	47%	38%	39%	39%
	B Buses in Chico could run every 30 minutes from 7am to 6pm	55%	65%	59%	63%	55%	62%	63%	53%	62%	61%	61%
Q30.	A More routes and more buses operating on local routes within Chico	82%	76%	79%	75%	78%	84%	86%	38%	77%	77%	78%
	B More buses on regional routes connecting Chico with the other communities in Butte county	18%	24%	21%	25%	22%	16%	14%	62%	23%	23%	22%
Q31.	A Bus routes that run every 60 minutes, and get you to your destination without transferring	44%	58%	60%	54%	57%	53%	53%	64%	64%	53%	55%
	B Bus routes that run every 30 minutes but require you to transfer to complete your trip	56%	42%	40%	46%	43%	47%	47%	36%	36%	47%	45%
Respondents from areas other than Chico												
Q33.	A Local buses could run weekdays only from 6am to 10pm	54%	73%	60%	70%	63%	56%	60%	67%	62%	69%	66%
	B Local buses could run seven days a week from 7am to 6pm	46%	27%	40%	30%	38%	44%	40%	33%	38%	31%	34%
Q34.	A Buses could run every 60 minutes throughout the day on weekdays only	59%	61%	54%	58%	62%	60%	57%	60%	57%	61%	59%
	B Buses could run every two hours, seven days a week, with 60 minute service only during commute hours on weekdays	41%	39%	46%	42%	38%	40%	43%	40%	43%	39%	41%
Q35.	A Buses could run every two hours from 6 am to 10 pm	41%	39%	33%	40%	33%	42%	32%	41%	33%	42%	39%
	B Buses could run every 60 minutes form 7 am to 6 pm	59%	61%	67%	60%	67%	58%	68%	59%	67%	59%	61%
Q36.	A More routes and buses operating on local routes within your community	28%	30%	30%	29%	27%	33%	57%	22%	33%	29%	30%
	B More buses on regional routes connecting your community with the other communities in Butte County	72%	70%	70%	71%	73%	67%	43%	78%	67%	71%	70%
Q37.	A Bus routes that run every 90 minutes, and get you to your destination without transferring	44%	60%	65%	59%	45%	61%	58%	56%	62%	58%	57%
	B Bus routes that run every 60 minutes but require you to transfer to complete your trip	56%	40%	35%	42%	55%	39%	42%	44%	38%	42%	44%

Among the student and employee commuter e-survey respondents, there are various constituent groups which may have different needs and preferences in terms of B-Line service and are, therefore, examined more closely. These groups include:

The market segments

- B-Line Riders
- Potential riders
- Non-riders

Employment / student status

- Employed
- Employed and student
- Student only

Common travel destination

- Primarily travel within home community
- Primarily travel among Butte County communities

Self-reported likelihood to use B-Line in the future

- Realistically, no matter now many improvements are made to B-Line service, not going to use it on a regular basis
- Likely to try using B-Line within the coming year if B-Line makes major improvements

Among Chico residents . . .

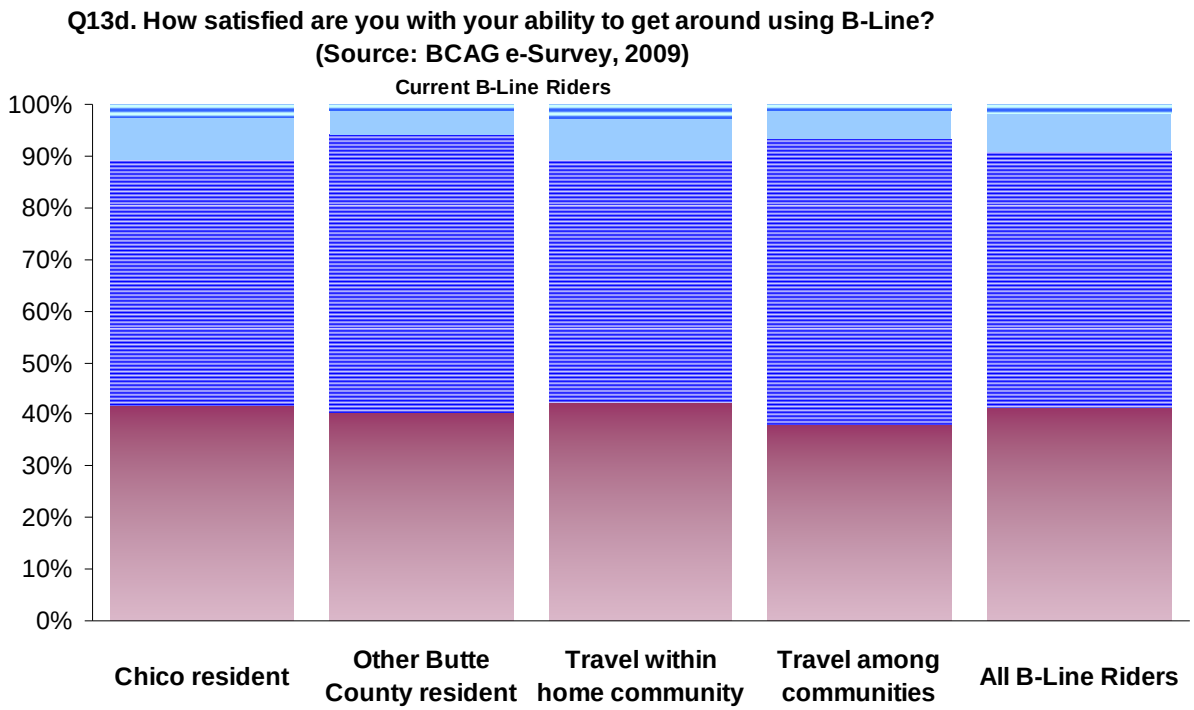
- Respondents overall have a preference for fewer days of service (weekdays only versus seven days) with longer hours of service on those days. Those groups having the strongest preference for this are B-Line Riders (62%), those who say they are likely to try B-Line if service improvements are made (62%), and those who are both employed and students (60%).
- Respondents overall prefer more frequent service on fewer days per week, with students showing the strongest preference for this (60%). Those who travel among communities in Butte County, however, prefer seven day service with less frequency (55%).
- Respondents overall prefer more frequent service with limited hours of operation with potential riders preferring this option most (65%).
- A large majority of respondents prefer more local routes to more regional routes (78% and 22%, respectively), especially those who travel primarily within their home community (86%), students (84%), and current B-Line Riders (82%). Not surprisingly, there is dissention among those who primarily travel among Butte County communities. Nearly two-thirds (62%) of these respondents prefer more regional routes to more local routes.
- Considering frequency of service and transfers, more than half of respondents overall prefer less frequent service without transfers to more frequent service with transfers. Those who travel among Butte County communities (64%), non-riders (60%), and potential riders (58%) most strongly prefer this choice. Notably, current B-Line riders prefer more frequent service even if it means transfers are required (56%).

Among residents of Butte County, excluding Chico . . .

- Respondents overall have a preference for fewer days of service with longer hours of service on those days. The preference is even stronger than for residents of Chico. Nearly three-fourths of potential riders (73%) and 70% of employed respondents prefer this choice.
- Respondents overall prefer more frequent service on weekdays (59%) over less frequent service seven days a week. There is little variation among the groups with regard to this trade-off.
- Similar to Chico residents, other Butte County residents prefer more frequent service over limited hours versus less frequent service beginning earlier in the day and ending later in the day. Those who are both employed and students (67%) and those who travel primarily within their home community (68%) indicate the strongest preference for this option.
- In complete opposition to Chico residents' preference for more local versus more regional routes, residents of other Butte County communities strongly prefer more regional routes (70%) over more local routes (30%). As expected, the exception to this is those residents who travel primarily within their home community, with 57% preferring more local routes.
- Considering frequency of service and transfers, more than half of non-Chico Butte County residents prefer less frequent service without transfers (57%) to more frequent service with transfers (43%). Exceptions--those who prefer more frequent service with transfers--include B-Line Riders (56%) and those who are both employed and students (55%).

Satisfaction with B-Line among current riders who commute

Figure 36 Satisfaction with B-Line



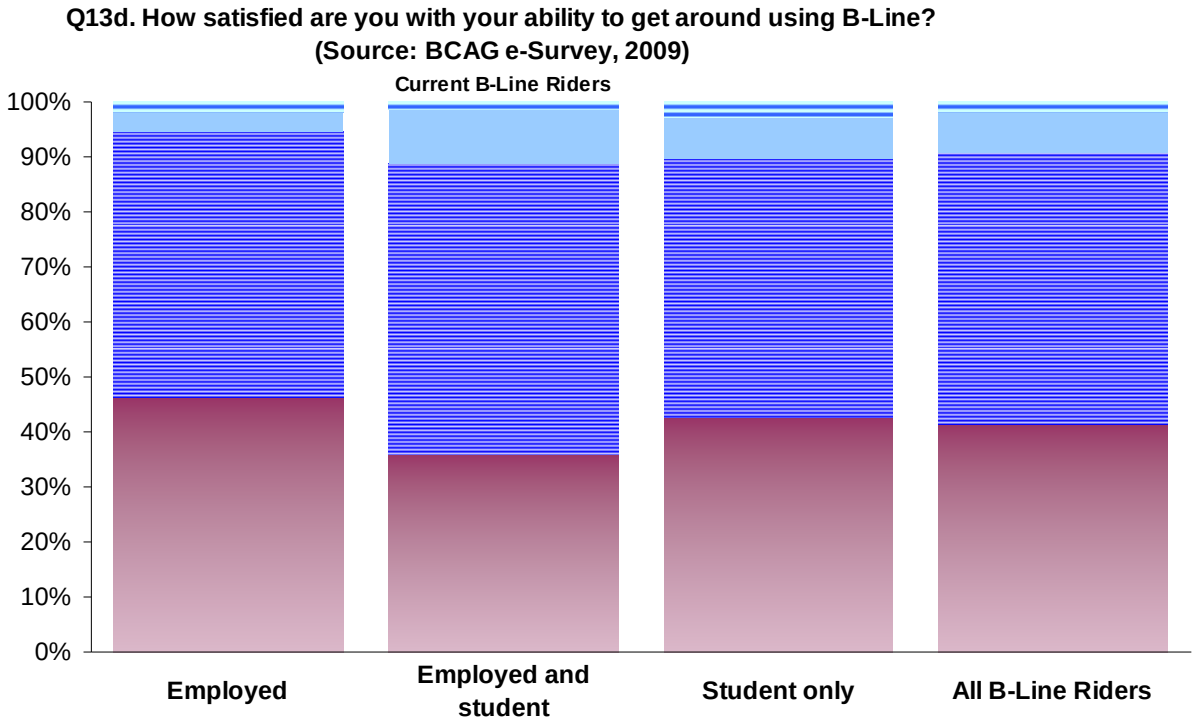
	Chico resident	Other Butte County resident	Travel within home community	Travel among communities	All B-Line Riders
Not at all satisfied	3%	1%	3%	1%	2%
Not very satisfied	8%	5%	8%	5%	7%
Somewhat satisfied	48%	54%	47%	55%	49%
Very satisfied	42%	40%	42%	38%	41%

Satisfaction with B-Line

Satisfaction with ability to get around using B-Line is examined comparing several groups whose experiences may differ.

- Overall, 90% of B-Line Riders are very or somewhat satisfied with their ability to get around using B-Line.
- Only 41% of current riders, however, cite being "very satisfied."
- Residents of Chico and residents of other communities within Butte County are similarly satisfied with B-Line.
- Ratings are also quite similar between those who primarily travel within their home community versus those who travel among Butte County communities; those traveling among communities give "satisfied" ratings more overall (93%), but give fewer ratings of "very satisfied" (38%) than do those traveling most often within their home community (89% and 42%, respectively).

Figure 37 Satisfaction with B-Line



	Employed	Employed and student	Student only	All B-Line Riders
Not at all satisfied	2%	2%	3%	2%
Not very satisfied	3%	10%	8%	7%
Somewhat satisfied	48%	53%	47%	49%
Very satisfied	46%	36%	43%	41%

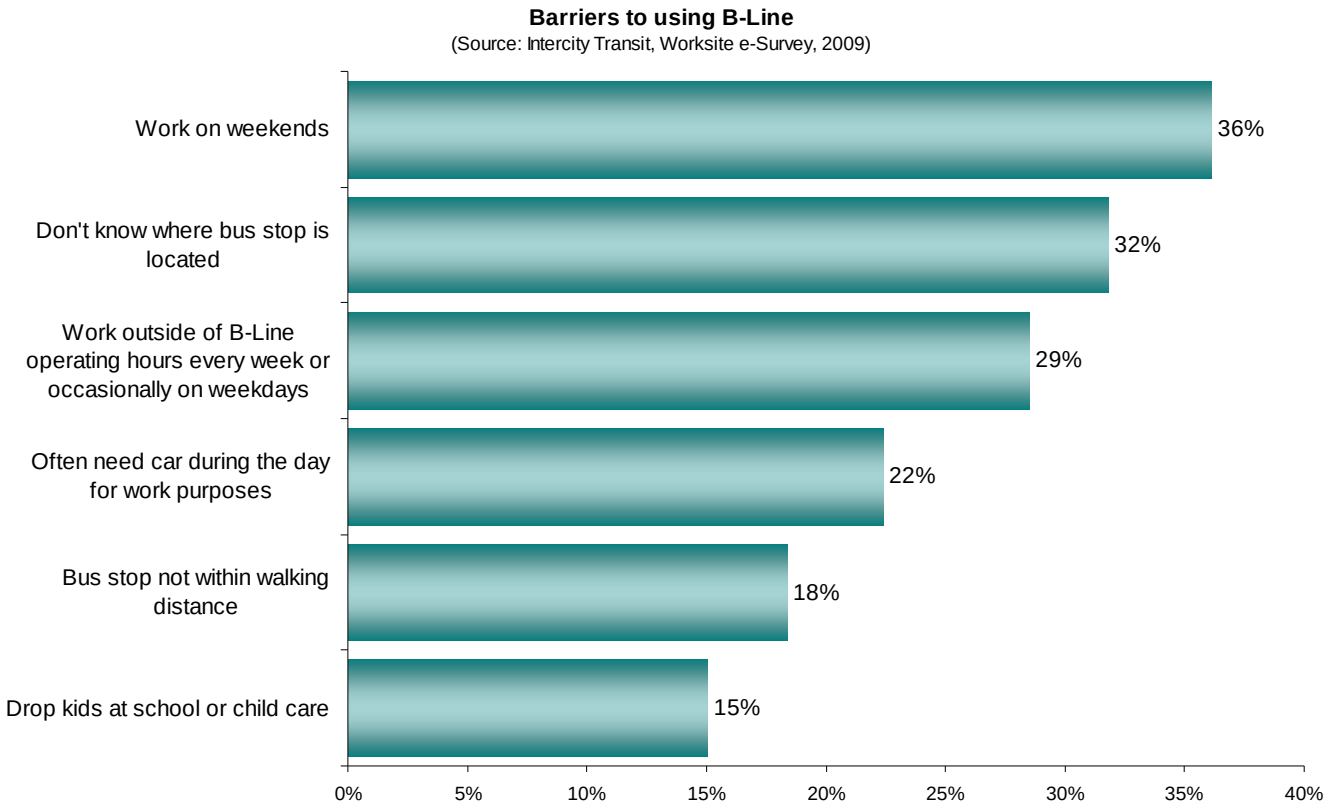
Satisfaction with B-Line

Examining rider satisfaction among workers and students:

- Ratings are quite similar between those commuting to work versus those commuting to school.
- Those commuting to work, however, tend to rate B-Line slightly higher than those commuting to school.
- Interestingly, those using B-Line who commute to both work and school give the fewest "very satisfied" ratings.
- A potential reason for fewer very satisfied ratings among those who commute both to work and school could be the need to commute to multiple sites during the day as opposed to commuting just from home to either work or school and back.

Barriers to using transit an preferences for improving it

Figure 38 Barriers to using B-Line



Barriers to Using B-Line

Looking at those who do not currently utilize B-Line, several obstacles to using B-Line are noted. Among respondents in general:

- 40% do not know where the closest bus stop to their home is.
- An additional 13% indicate the closest bus stop is not in walking distance.
- 17% must drop kids at day care or school

Barriers particular to employed respondents include:

- 36% work on weekends. Given limited Saturday service and lack of Sunday service, this is a considerable limitation.
- 29% work outside of B-Line operating hours every week or occasionally.
- 22% often need their car for business purposes during the workday (an additional 15% indicate they occasionally need to use their car for business purposes during the workday).

Appendix A: Open Ended Questions

Respondents were asked open ended questions:

- What is the main reason that would keep you from using B-Line on a regular basis?
- What is the one most important change in service that would lead you to try using B-Line regularly?
- For you personally, what would be the one most improtant improvement in B-Line service? (Riders only)

The charts on the next three pages summarize these response by category, broken down by market segment and employment status.

Verbatim answers to these questions, showing rider segment, city of residence and destination are included in a separate Excel file for easy reference, searching and sorting.

See Attached Excel File: E-Survey Comments

Categorized Open Ended Responses: Barriers

Q40	What is the main reason that would keep you from trying B-Line on a regular basis?	Ridership segment			Employment/Student Status			Total respon-dents
		B-Line Rider	Potential rider	Non-rider	Student	Faculty or Staff	Other employee	
1	Age, health, physical limitations		.5%	1.5%	.7%	1.6%	1.0%	1.1%
2	Bus takes too long / car faster / can't wait around for bus	7.3%	11.2%	9.8%	10.3%	7.4%	15.5%	10.1%
3	Don't like riding bus		1.0%	1.5%	1.3%	1.6%		1.2%
4	Want (need) flexibility during the day	7.3%	9.6%	9.1%	9.0%	9.1%	9.7%	9.1%
5	Impractical for errands, carrying packages, etc.		1.5%	2.2%	1.0%	2.1%	3.9%	1.9%
6	Need vehicle for work purposes		2.0%	3.9%	1.3%	3.7%	6.8%	3.1%
7	No need to use bus	7.3%	1.5%	1.0%	2.7%	.4%	1.0%	1.5%
8	No B-Line service in my area		9.6%	4.4%	4.7%	8.6%	1.9%	5.7%
9	Prefer own vehicle	7.3%	9.6%	10.3%	12.7%	6.6%	9.7%	9.9%
10	Bus stop is too far		4.1%	1.0%	1.3%	2.1%	2.9%	1.9%
11	Travel with kids	2.4%	5.6%	12.0%	2.0%	16.9%	13.6%	9.4%
13	Bus schedule incompatible with my schedule	12.2%	7.1%	7.1%	8.0%	6.6%	7.8%	7.4%
14	Uncomfortable with others on bus / safety concern	7.3%	5.6%	4.4%	5.7%	2.5%	8.7%	5.0%
15	Prefer (or faster to) walk or bicycle	24.4%	14.7%	15.4%	20.3%	15.2%	3.9%	15.8%
17	Short commute	7.3%	6.6%	3.7%	6.7%	2.5%	4.9%	4.8%
18	Inconvenient / bus not convenient		1.5%	4.4%	2.0%	5.3%	1.9%	3.3%
19	Lack of independence / prefer freedom of car / sense of control		2.5%	4.2%	3.3%	3.3%	3.9%	3.4%
20	No route that is appropriate		1.5%	.5%	1.0%	.8%		.8%
21	Too complicated to figure out	2.4%		1.0%	1.3%	.4%		.8%
97	Other	14.6%	4.1%	2.7%	4.7%	3.3%	2.9%	3.9%
n	Number of survey respondents per comparison group	46	197	408	300	243	100	651

Categorized Open Ended Responses: Desired Change

Q41	What would be the one most important change in service that would lead you to try using B-Line regularly?	Ridership segment			Employment/Student Status			Total respon-dents
		B-Line Rider	Potential rider	Non-rider	Student	Faculty or Staff	Other employee	
1	Expand service areas	4.7%	9.9%	8.7%	8.3%	9.7%	9.8%	9.1%
2	Extend hours of service	16.2%	10.3%	12.5%	10.5%	8.9%	16.2%	11.3%
3	Have a stop closer to my home and/or destination	5.4%	13.3%	4.8%	10.0%	12.9%	11.7%	11.5%
4	Have schedules that meet my commuting needs	2.0%	7.1%	10.6%	5.4%	6.2%	9.8%	6.7%
5	Improve bus conditions - cleanliness, rude drivers	2.7%	1.0%	4.8%	3.1%	.5%	.8%	1.6%
6	Improve bus stops - condition, safety, clearly marked	.7%	1.0%	1.0%	1.3%	.7%	.8%	1.0%
7	Increase frequency of service	20.3%	17.0%	19.2%	20.3%	14.1%	18.4%	17.6%
8	More direct routes / express routes	4.1%	5.1%	1.9%	2.9%	4.5%	7.9%	4.7%
9	More routes / different routes	9.5%	8.8%	5.8%	8.7%	5.5%	13.2%	8.6%
10	Provide better info about service, schedule, routes, etc.	5.4%	4.5%	2.9%	7.6%	3.0%	1.5%	4.5%
11	Provide on-time service / more reliable service	4.1%	2.2%	4.8%	4.2%	2.0%	1.1%	2.7%
12	Provide service to Butte College	4.7%	10.2%	1.9%	3.8%	19.9%		8.7%
13	Provide weekend service	7.4%	.3%	1.9%	2.0%	1.0%	1.1%	1.4%
14	Reduce fares / offer student discount	5.4%	.8%	1.9%	3.1%	.7%		1.5%
15	Reduce trip time	2.0%	3.5%	6.7%	2.7%	5.0%	3.0%	3.6%
16	Uncomfortable with other riders, safety concerns, crowded	2.0%	.9%	3.8%	1.6%	1.5%	.8%	1.3%
97	Other	3.4%	4.0%	6.7%	4.5%	4.0%	4.1%	4.2%
n	Number of survey respondents per comparison group	148	865	104	448	403	266	1117

Categorized Open Ended Responses: Desired Improvement for Riders

Q42	For you personally, what would be the one most important improvement in B-Line service?	Ridership segment			Employment/Student Status			All respon-dents
		B-Line Rider	Potential rider	Non-rider	Student	Faculty or Staff	Other employee	
1	Expand service areas	3.2%			4.4%	2.4%		3.5%
2	Extend hours of service	17.1%			15.3%	28.6%	13.5%	17.0%
3	Have a stop closer to my home and/or destination	1.1%			1.0%		2.7%	1.1%
4	Have schedules that meet my commuting needs	6.8%			8.4%	2.4%	2.7%	6.7%
5	Improve bus conditions - cleanliness, rude drivers	6.4%			7.4%	4.8%	2.7%	6.4%
6	Improve bus stops - condition, safety, clearly marked	3.2%			3.4%	4.8%		3.2%
7	Increase frequency of service	14.6%			12.8%	16.7%	21.6%	14.5%
8	More direct routes / express routes	2.8%			2.0%	4.8%	5.4%	2.8%
9	More routes / different routes	5.0%			2.5%	7.1%	16.2%	5.0%
10	Provide better info about service, schedule, routes, etc.	5.3%			6.4%		5.4%	5.3%
11	Provide on-time service / more reliable service	14.6%			15.8%	4.8%	18.9%	14.5%
12	Provide service to Butte College	1.8%			2.5%			1.8%
13	Provide weekend service	8.2%			8.4%	9.5%	5.4%	8.2%
14	Reduce fares / offer student discount	2.5%			3.0%		2.7%	2.5%
15	Reduce trip time	.7%			1.0%			.7%
16	Uncomfortable with other riders, safety concerns, crowded	1.4%			1.5%	2.4%		1.4%
97	Other	5.3%			4.4%	11.9%	2.7%	5.3%
n	Number of survey respondents per comparison group	281			203	42	37	282