



Awareness and Attitudes Study

June 2006





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Objectives

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Objectives

- *Gauge awareness, understanding and perceptions of OCTA*
- *Identify where transportation issues rank among community concerns and problems*
- *Explore the usage of the OCTA bus system*
- *Gauge the impact of marketing and advertising on the awareness, understanding and perceptions of the OCTA and its services*
- *Understand the media usage of the community, specifically those who are likely to use the OCTA bus system*
- *Develop a directional demographic profile of those who use the OCTA bus system*
- *Track changes in these factors over time*
- *The 2006 study included Metrolink usage questioning*





Methodology

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Methodology

- **Telephone Interviews**

- *Random sample of 1000 adult residents of Orange County*
- *Mix of gender and age*
- *Survey conducted in both English and Spanish*
- *Margin of error of $\pm 3\%$ at a 95% confidence level*



Key Findings





Key Findings

General Awareness and Attitudes

- Crime and education were the most important issues to respondents

OCTA Awareness and Perceptions

- Overall, awareness of OCTA is high
 - The most known OCTA services are buses and ACCESS Paratransit
- Over half of respondents have a favorable impression of OCTA
 - Most agree that OCTA is a valuable part of their community
- The top issue respondents feel that OCTA should focus on is developing long-range plans to study new transportation solutions, a significant increase from the 2004 study
- A new service respondents feel OCTA should enhance/increase is bus transportation for seniors



Key Findings

OCTA Advertising and Marketing

- Awareness of OCTA advertising continues to be moderate
 - Advertising awareness was highest in newspaper and exterior bus signage
 - Measure M was the message respondents most recalled

OCTA Service Usage

- The 91 Express Lane toll road and bus transportation were the most used OCTA services in the past year
- Over one-third ride the bus at least once a week
 - The main reason for riding the bus is convenience

Metrolink Usage

- The majority of respondents are not riding the Metrolink
 - For those who do ride, the main reason is convenience
 - Respondents cited two reasons to increase ridership
 - Service to more areas
 - More information about Metrolink



Key Findings

Media Usage

- The majority of respondents subscribe to cable television
 - Discovery, ESPN, CNN and HBO are the most watched cable stations
- Half of all respondents read the Orange County Register
- The majority have Internet access and use a cell phone daily
- KFI (640 AM) is the most listened to radio station



Key Findings

Directional demographic profile

- The directional demographic profile is on par with that of the 2004 study
 - OCTA riders are more likely to:
 - Be younger
 - Be single or divorced
 - Rent rather than own
 - Be less educated
 - Be Hispanic
 - Have a lower household income
 - Have children under 18 in household
 - Prefer the interview be completed in Spanish
 - OCTA bus riders are less likely to:
 - Be registered to vote
 - Be married



In-depth Findings

↑ ↓ *Represents significant change from 2004 study to 2006 study*



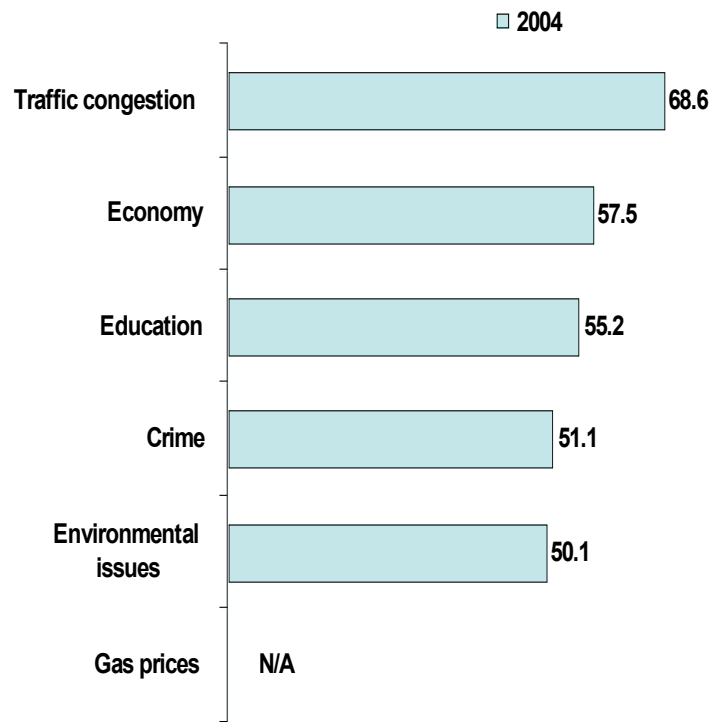


General Awareness and Attitudes

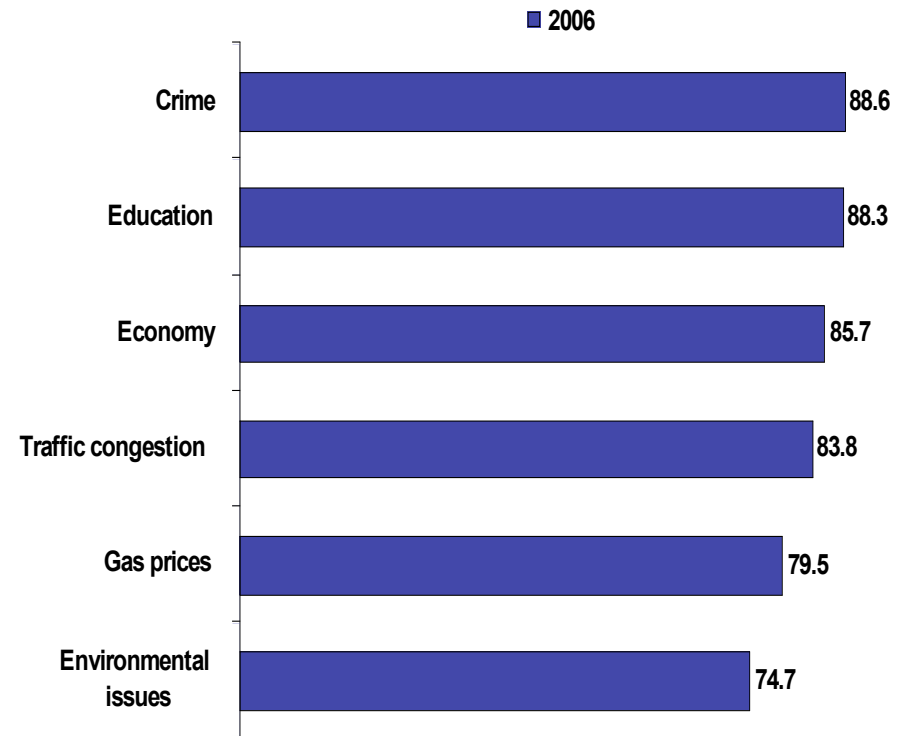




- In the current study, crime and education are the most important issues to respondents, while environmental issues ranked lowest in terms of importance among respondents



No problem – Severe problem



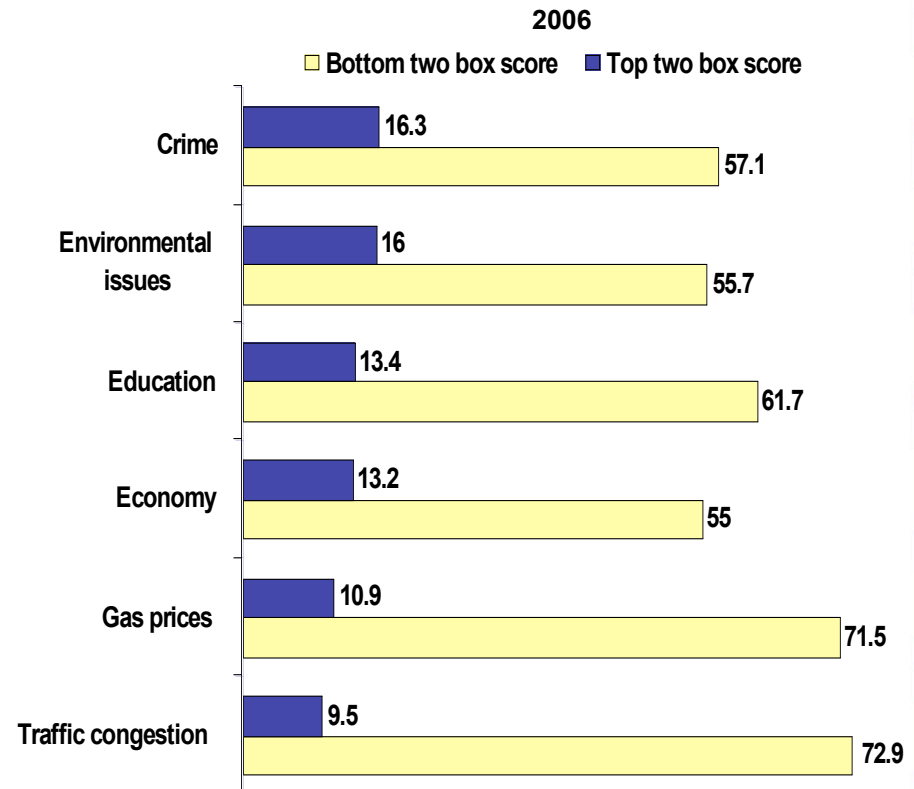
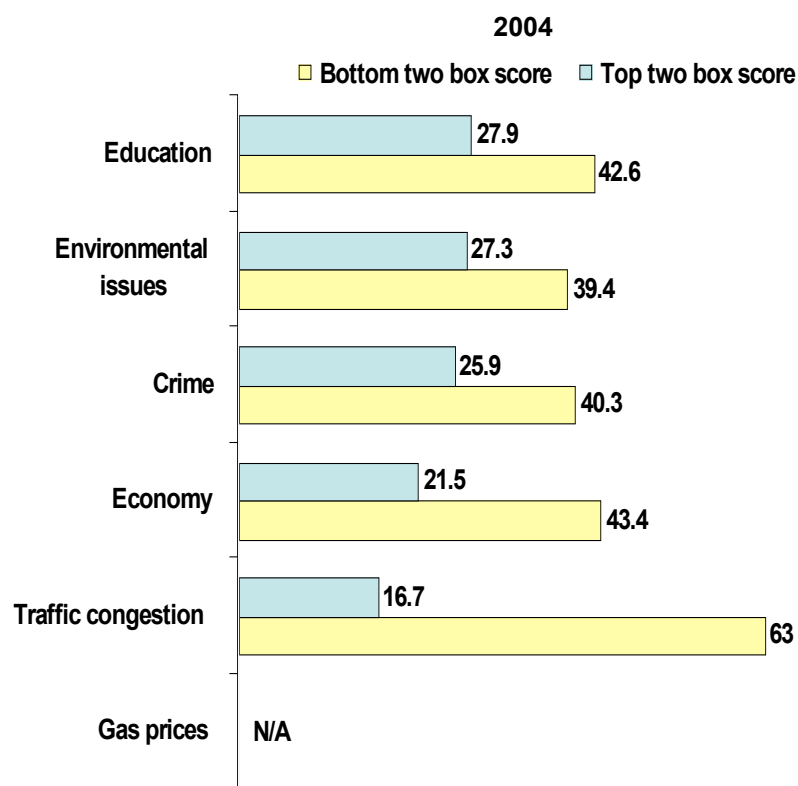
Not important to me – Very important to me

The 2004 study and the 2006 study could not be directly compared because of the difference in scale

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- There is high dissatisfaction among all issues, with over 7 out of 10 respondents being least satisfied with traffic congestion and gas prices



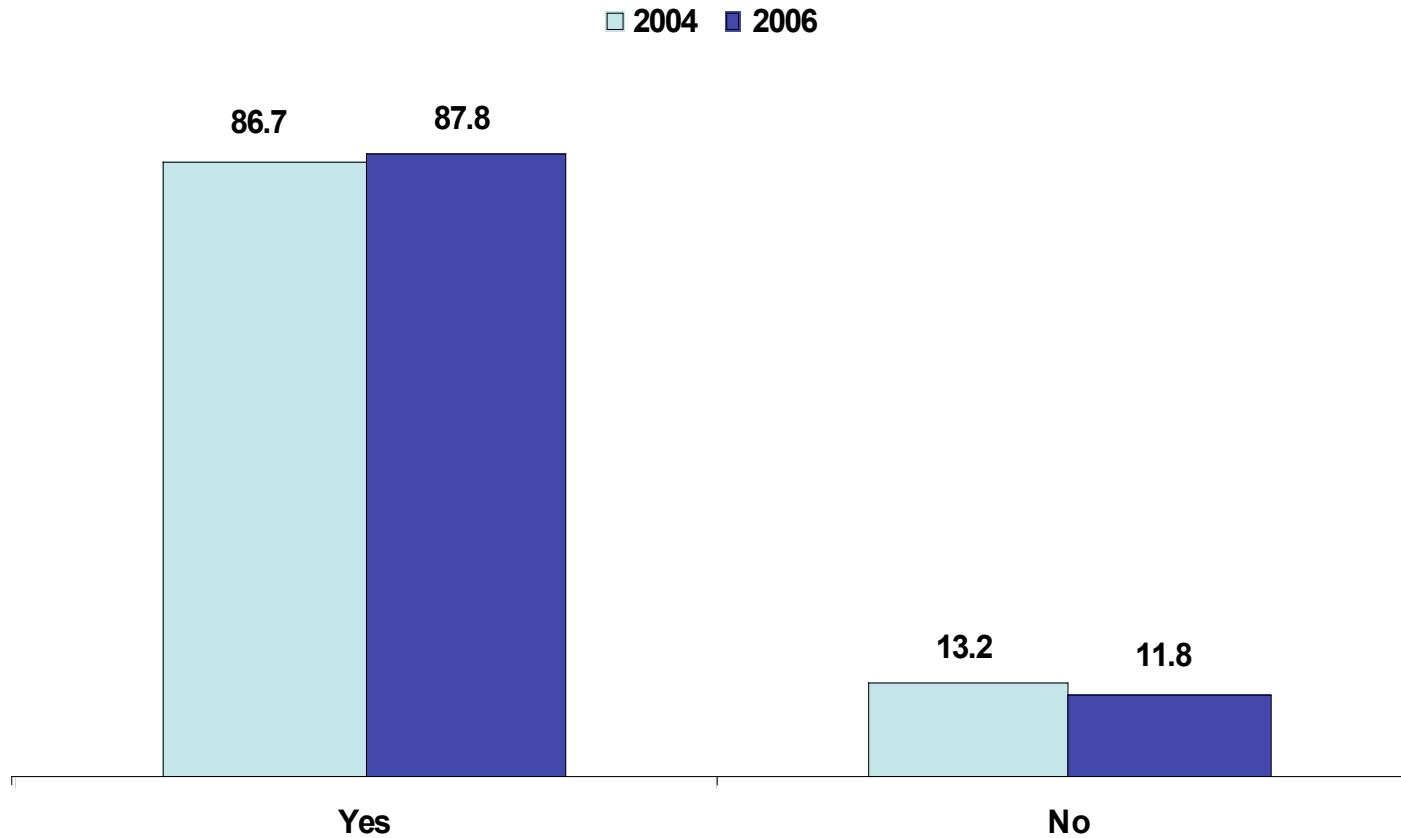


OCTA Awareness and Perceptions





- Awareness with OCTA remains strong, with almost 9 in 10 respondents aware of the company

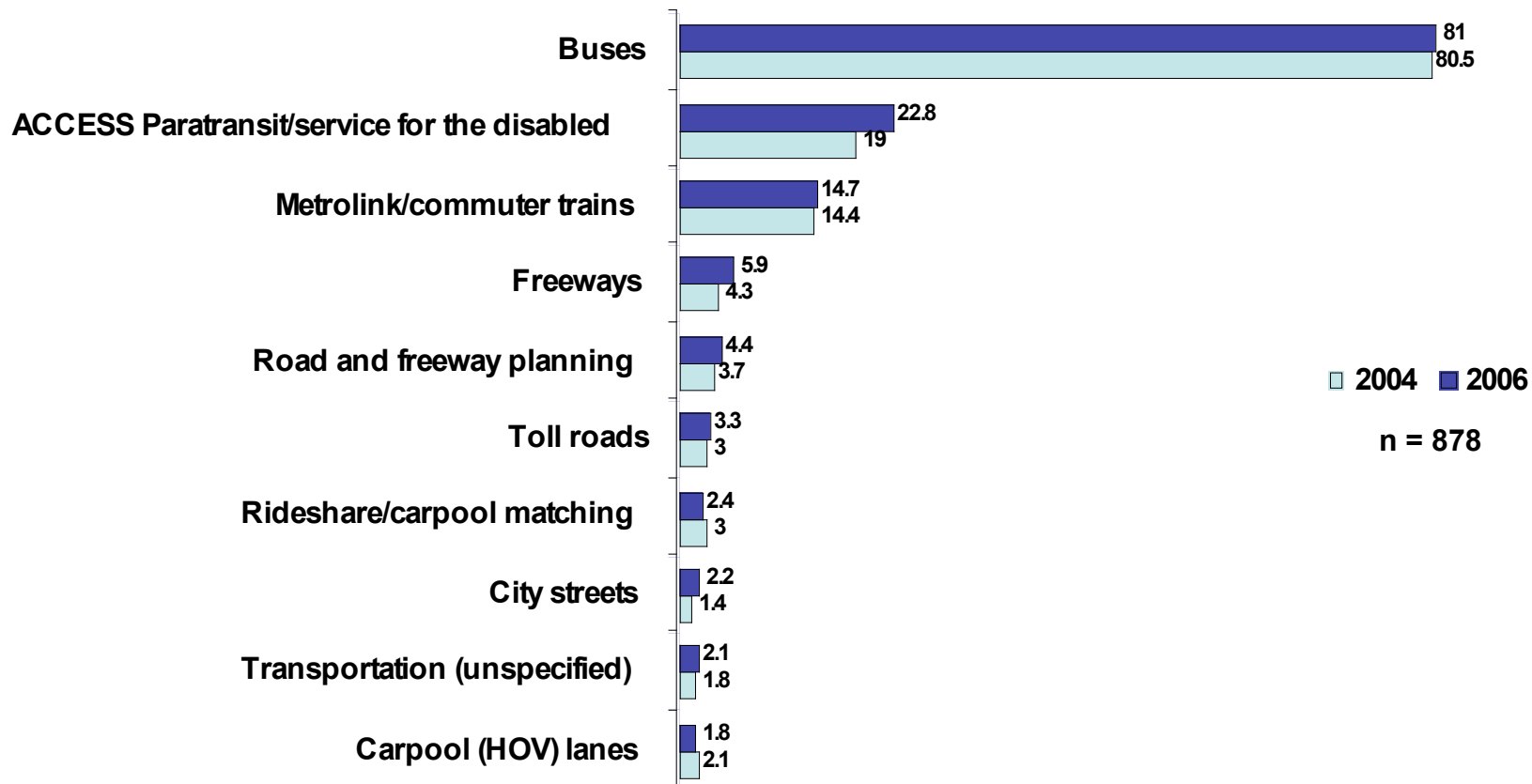


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- The majority of respondents know or have heard of OCTA bus service
- There is a slight increase in the percentage of respondents who know or have heard of ACCESS Paratransit

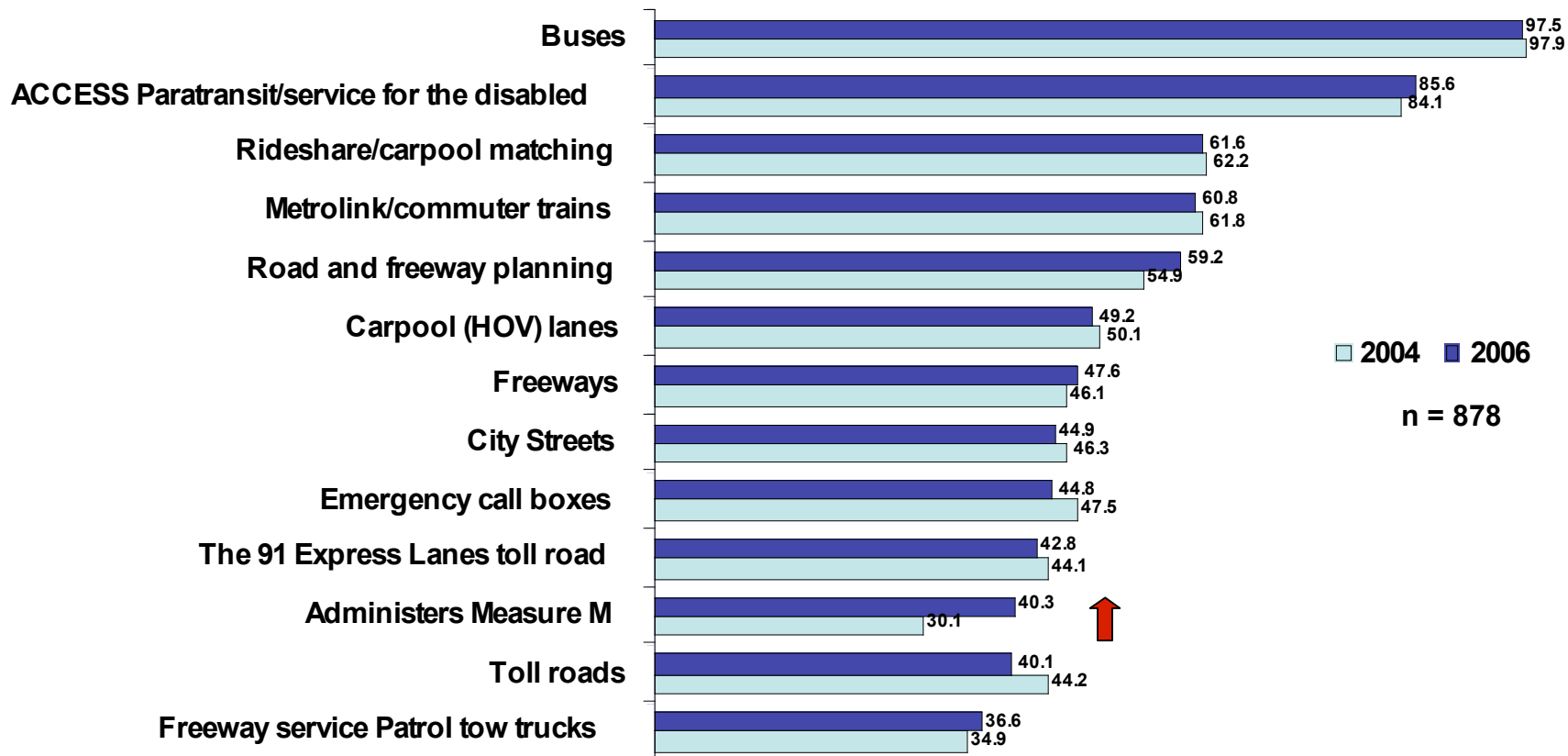


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Q4. From what you know or may have heard about OCTA, what types of services does OCTA provide?
Top ten responses only



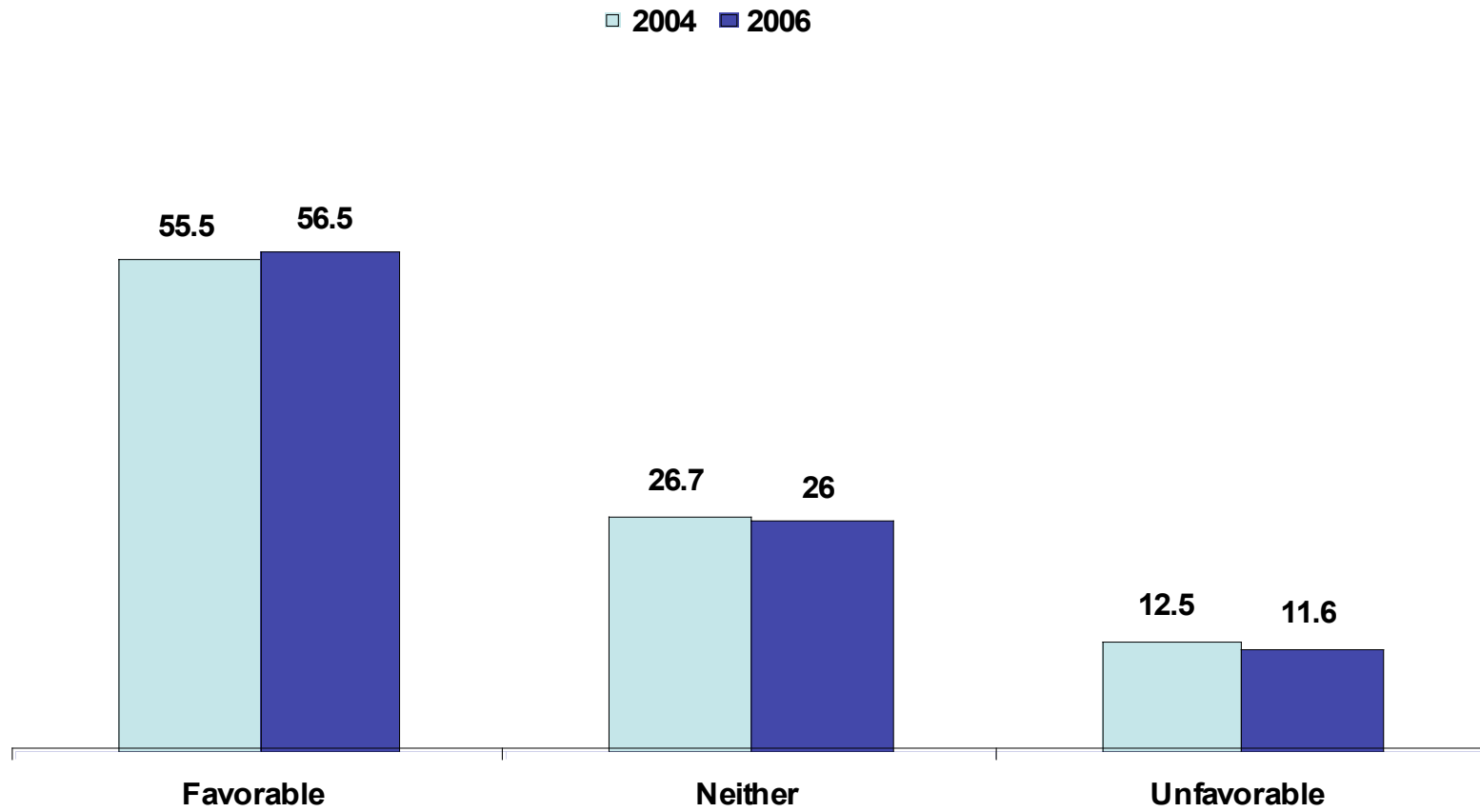
- The majority of respondents continue to be aware of both the bus service and ACCESS Paratransit
- Compared to the 2004 study, there is a significant increase in those who are aware that OCTA administers Measure M



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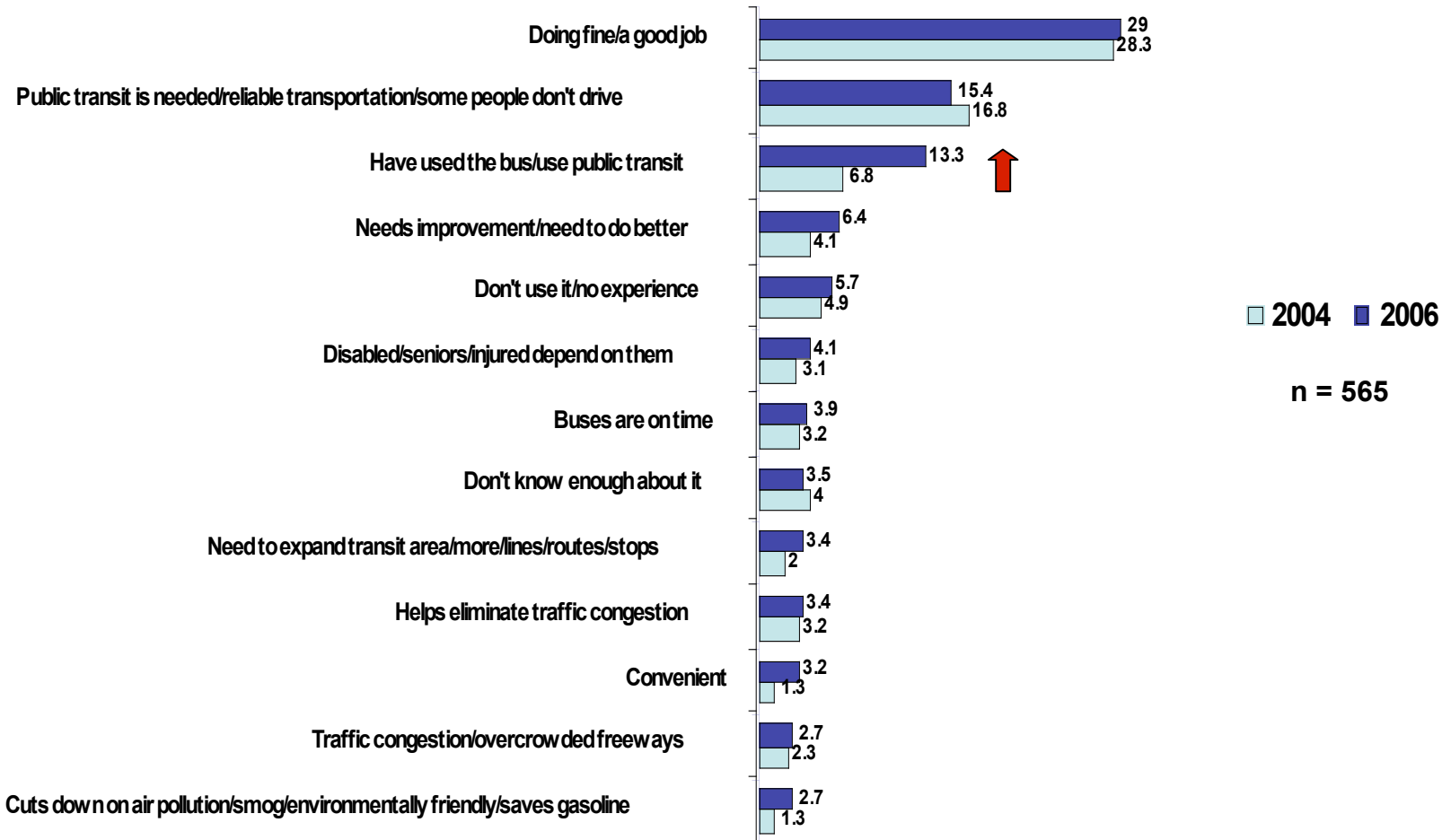
- More than half of respondents have a favorable impression of OCTA



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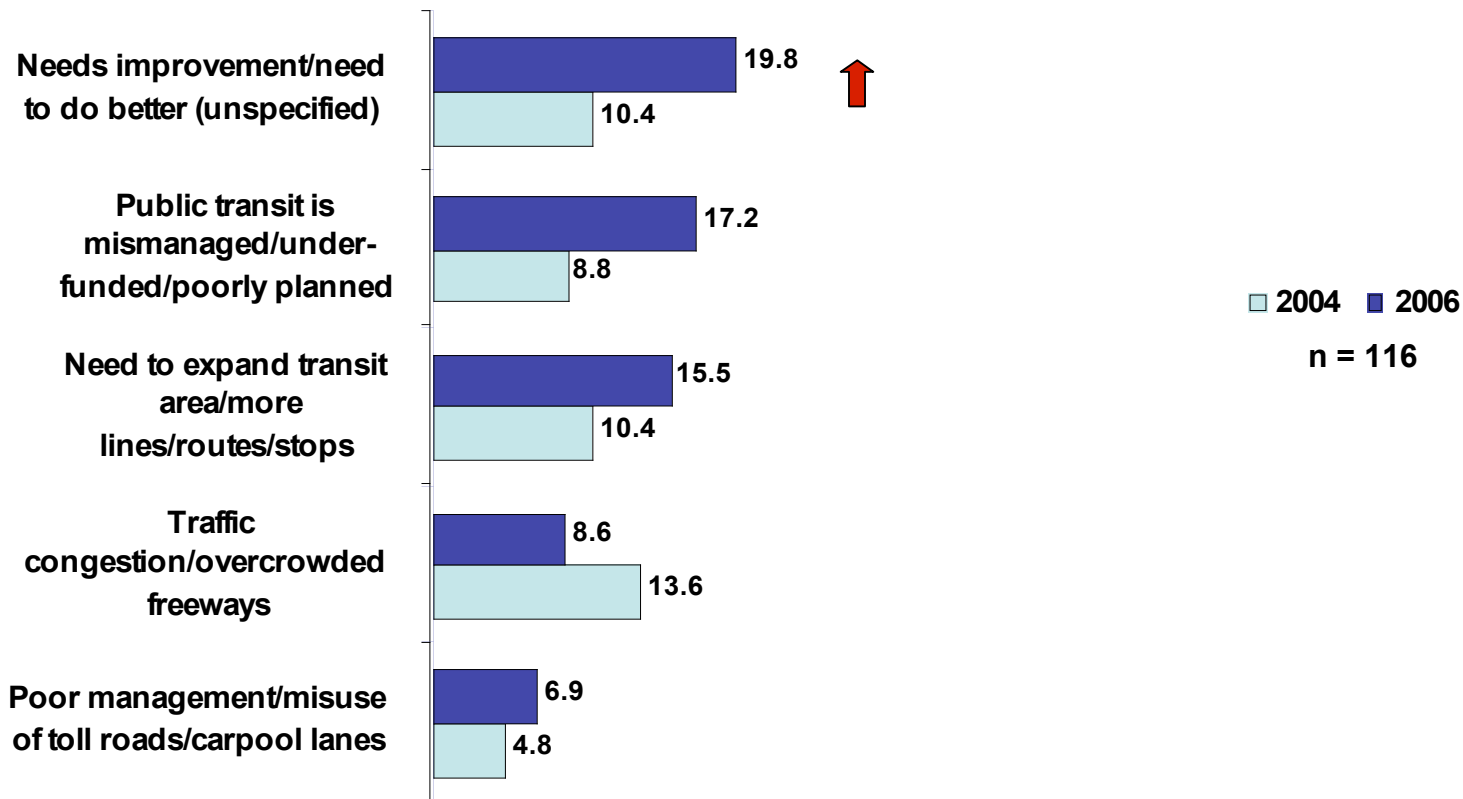


- Of those that have a favorable impression of OCTA, most believe the company is doing a good job





- Of those that have an unfavorable impression of OCTA, most believe the company needs improvement/needs to do better, but did not specify how. This is a significant increase from the 2004 study
- The other top two reasons are public transit is mismanaged/under-funded/poorly planned and need to expand transit area/more lines/routes/stops

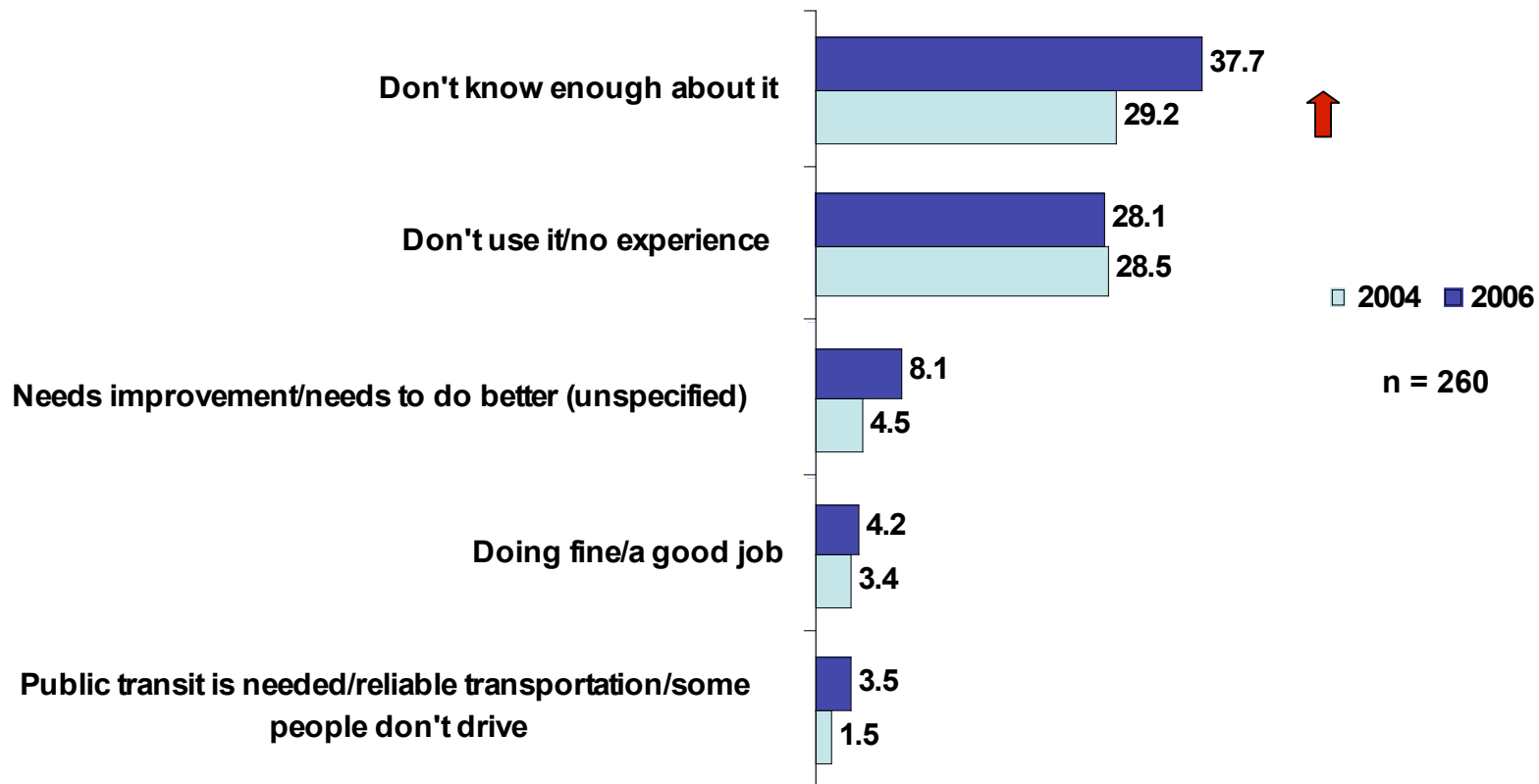


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Q7. Why do you have that impression of OCTA? (Bottom two box impression of OCTA)
Top five responses only

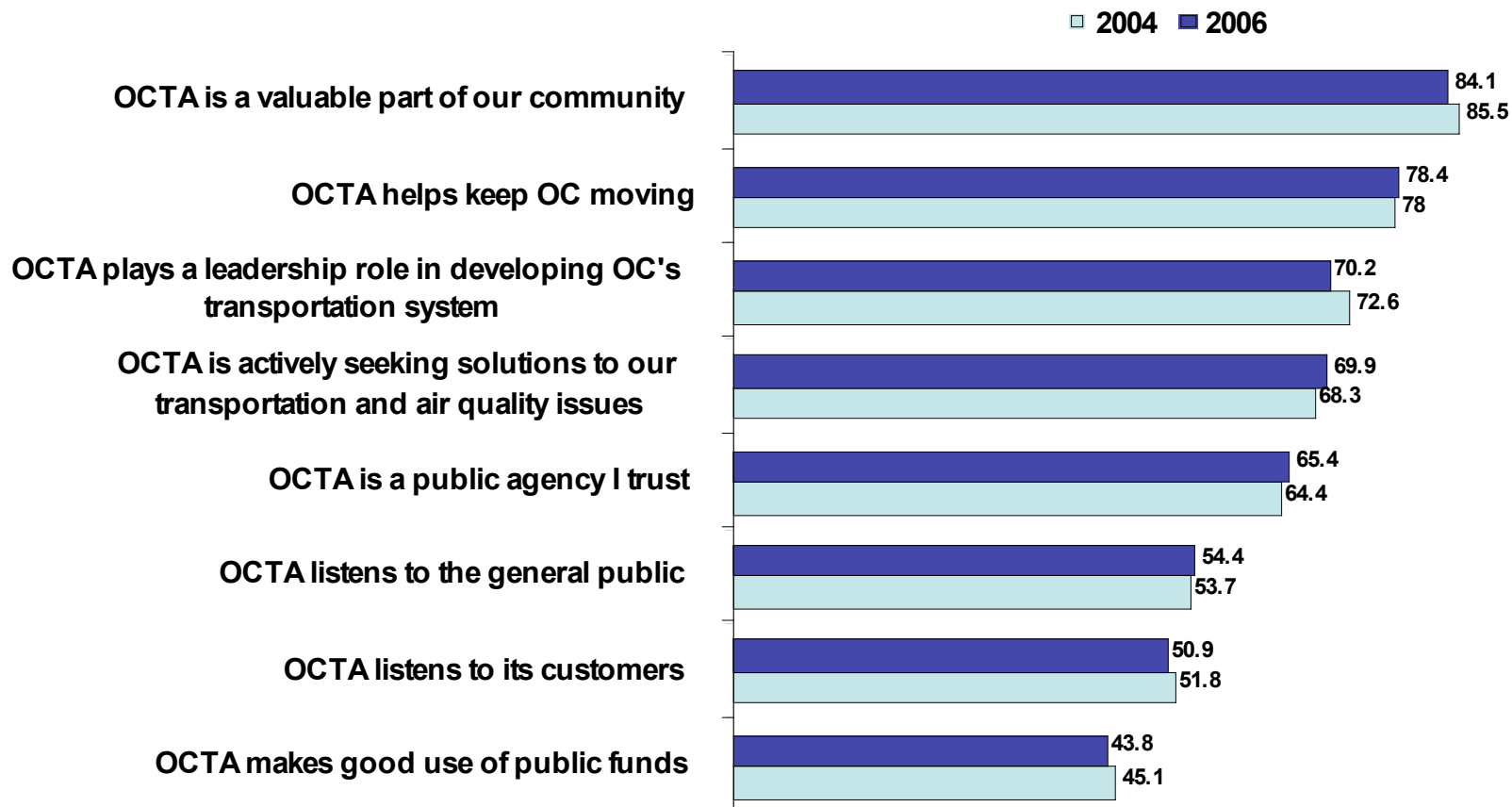


- Of those that have a neutral impression of OCTA, the majority either don't know enough about it or don't use it/no experience





- The majority of respondents agree that OCTA is valuable to their community
- OCTA helps keep OC moving, OCTA plays a leadership role in developing OC's transportation system, and OCTA is actively seeking solutions to transportation and air quality issues are other statements that respondents highly agree with

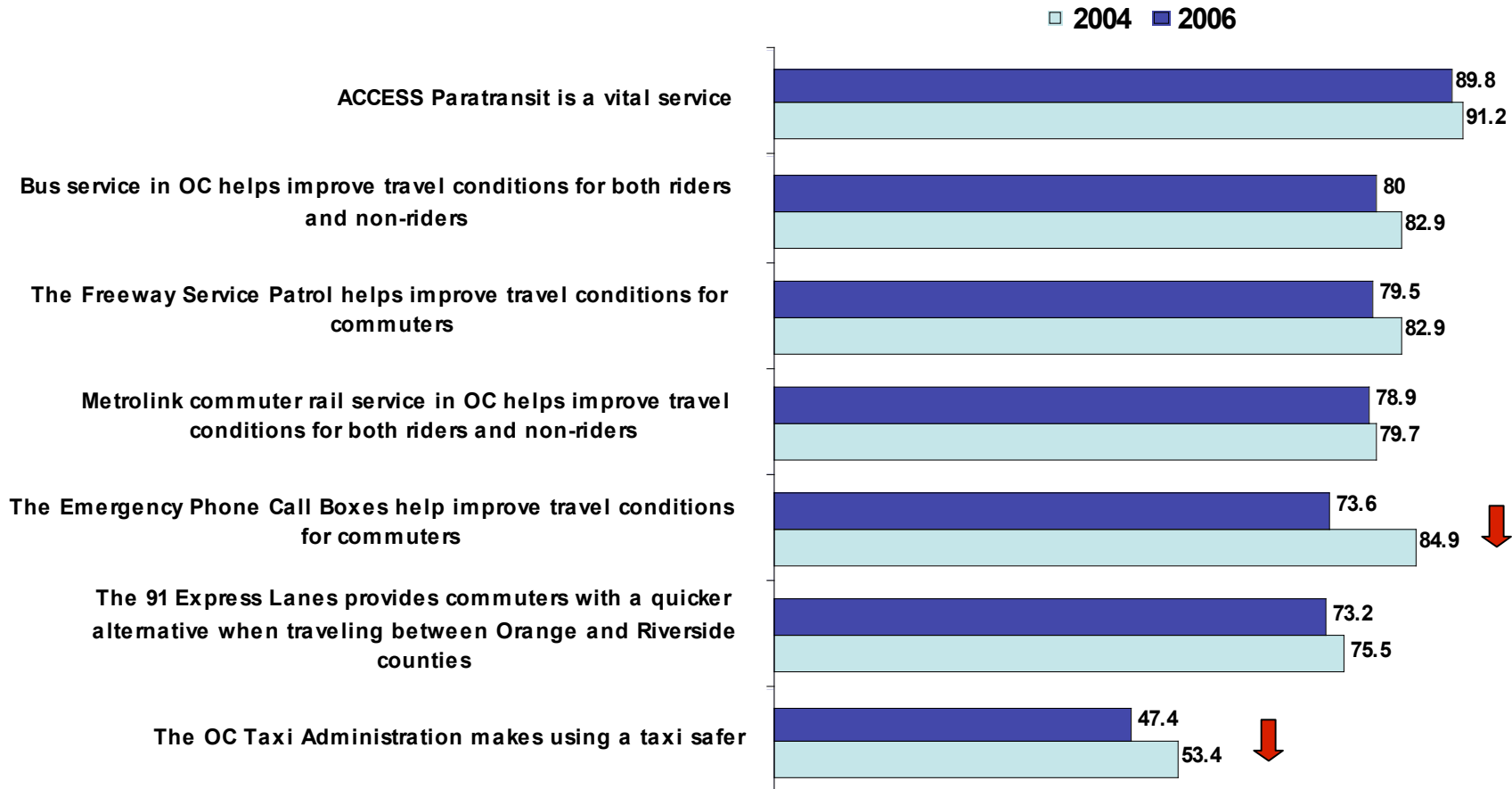


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Q8. Please rate how much you agree with the general statements regarding OCTA?
Top two box score



- The majority of respondents agree that ACCESS Paratransit is a vital service
- Respondents who agreed that the emergency phone call boxes help improve travel conditions for commuters and that the OC Taxi Administration makes using a taxi safer, decreased significantly from the 2004 study



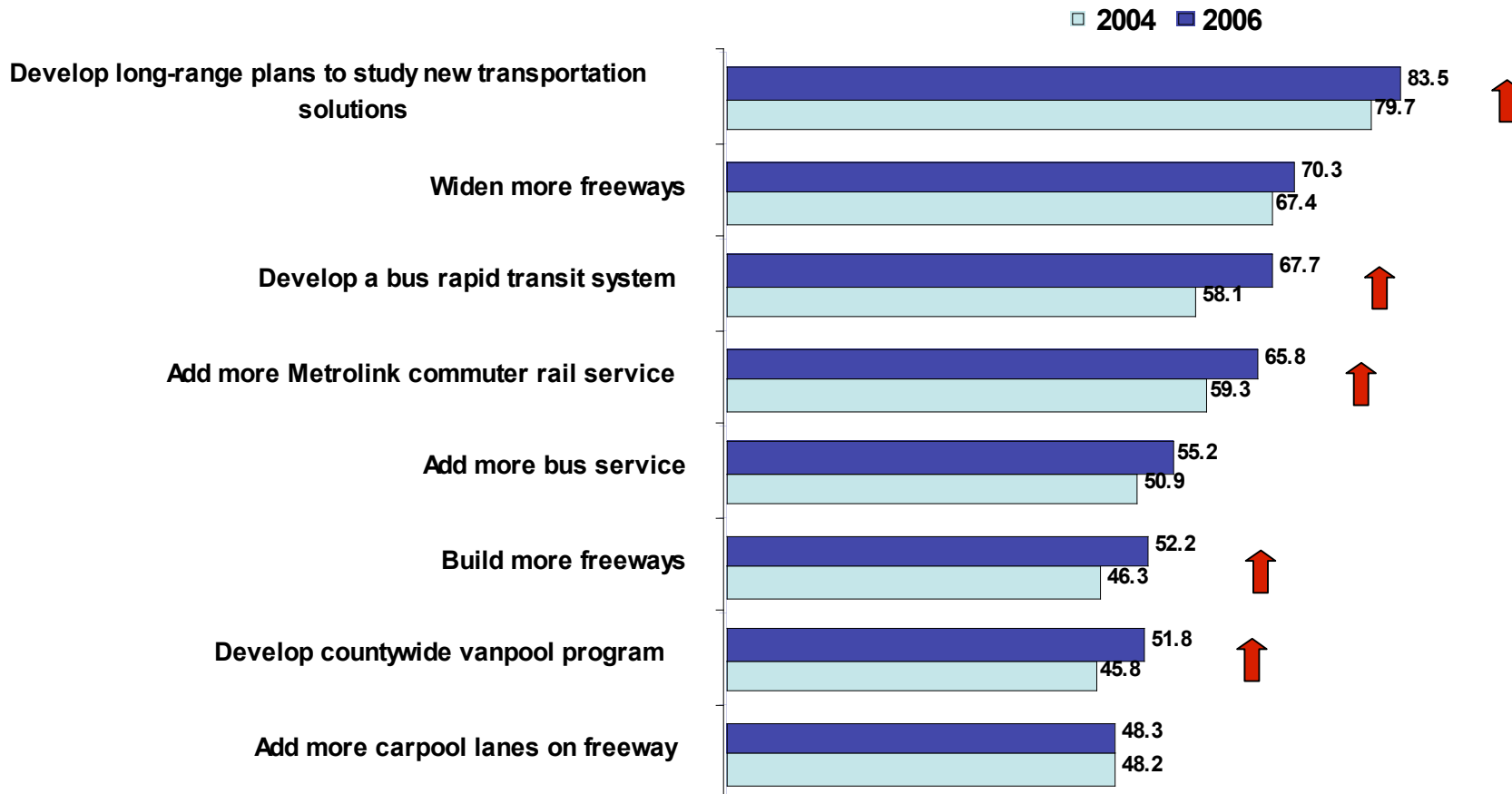
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Q9. Please rate how much you agree with the statements regarding specific OCTA services?

Top two box score



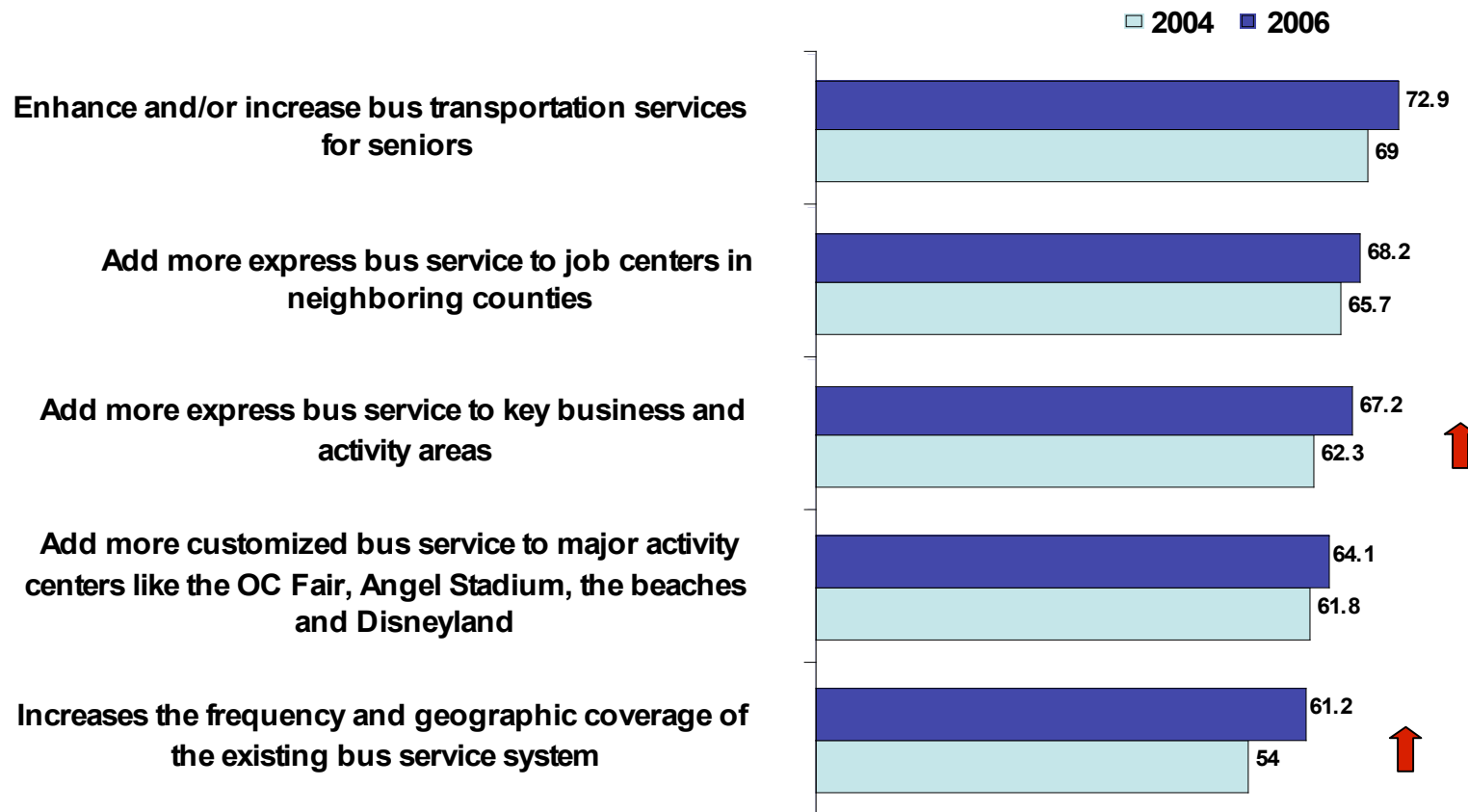
- Developing long-range plans to study new transportation solutions, widening more freeways, and developing a bus rapid transit system are the top three issues respondents feel that the OCTA should focus on



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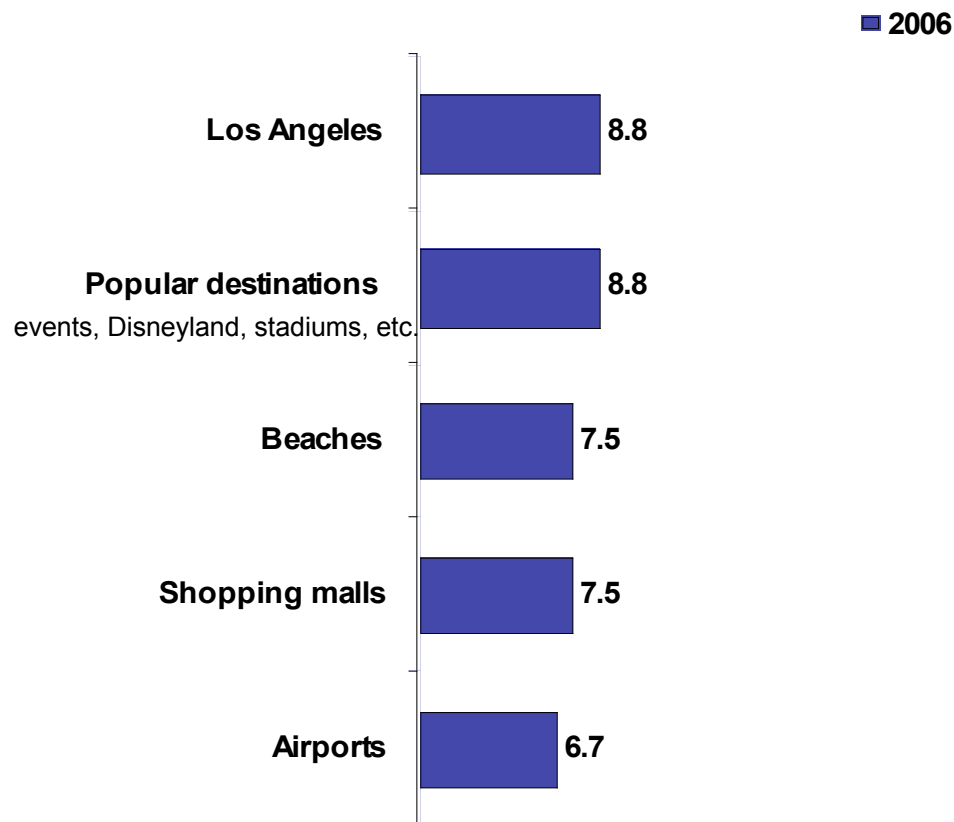


- Overall, a greater percentage of respondents agreed to these statements than in 2004
- Bus transportation for seniors is the service most respondents feel OCTA should add or enhance





- The majority of respondents chose Los Angeles or popular destinations as a new route they would like to see
- Additional service to beaches, shopping malls and airports are also popular responses





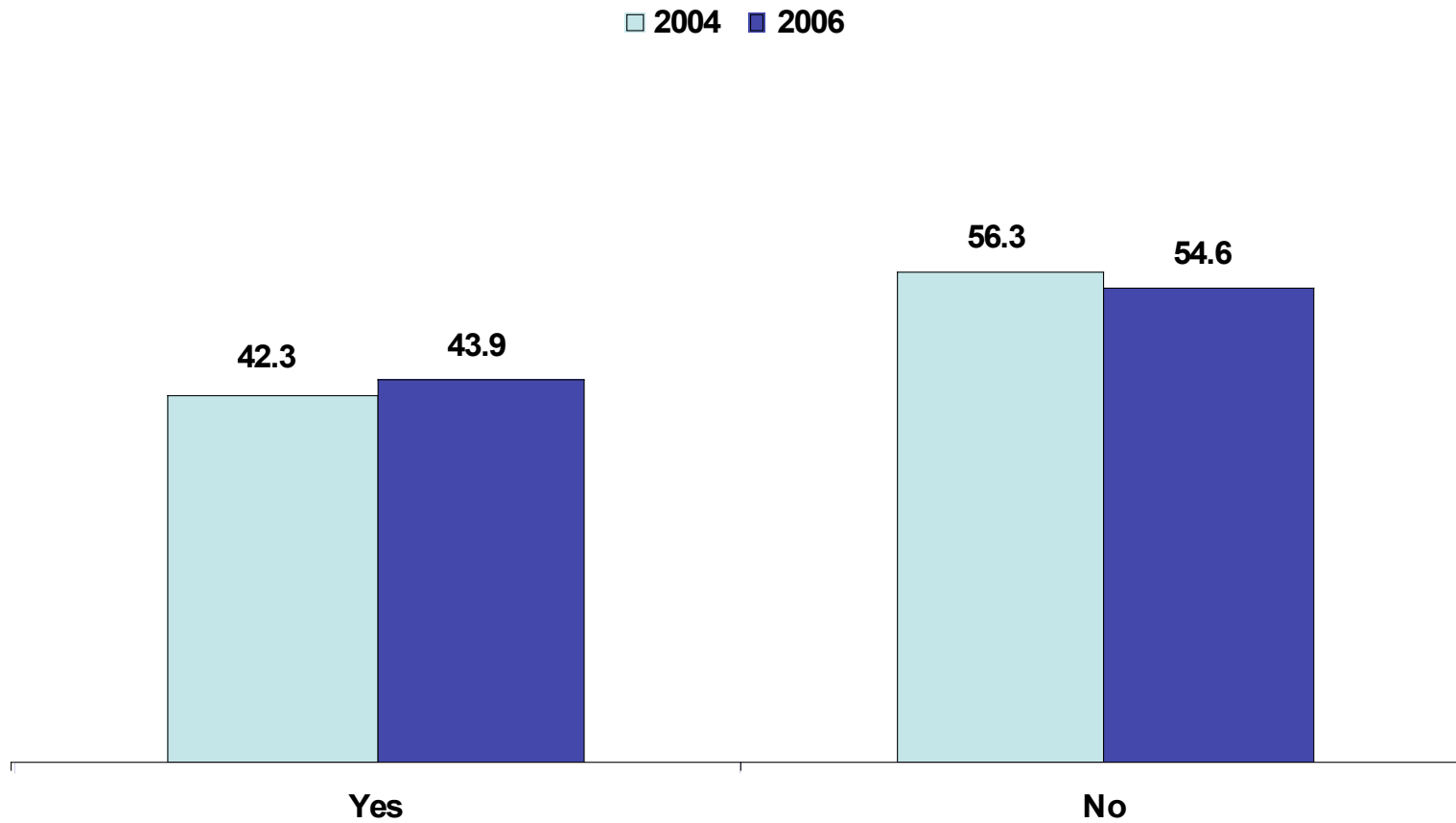
OCTA Advertising and Marketing

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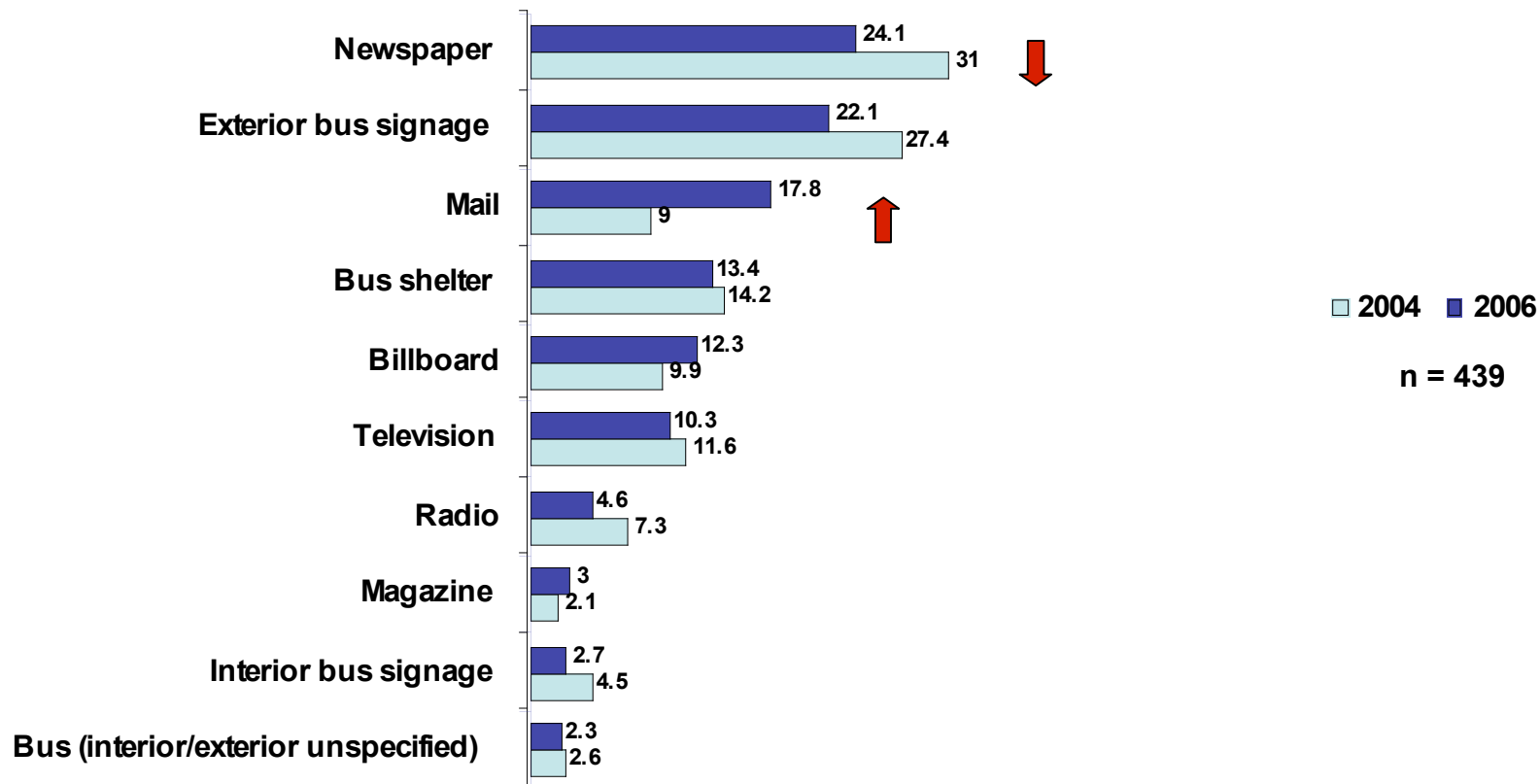
- Less than half of respondents had seen or heard OCTA advertising in the past six months



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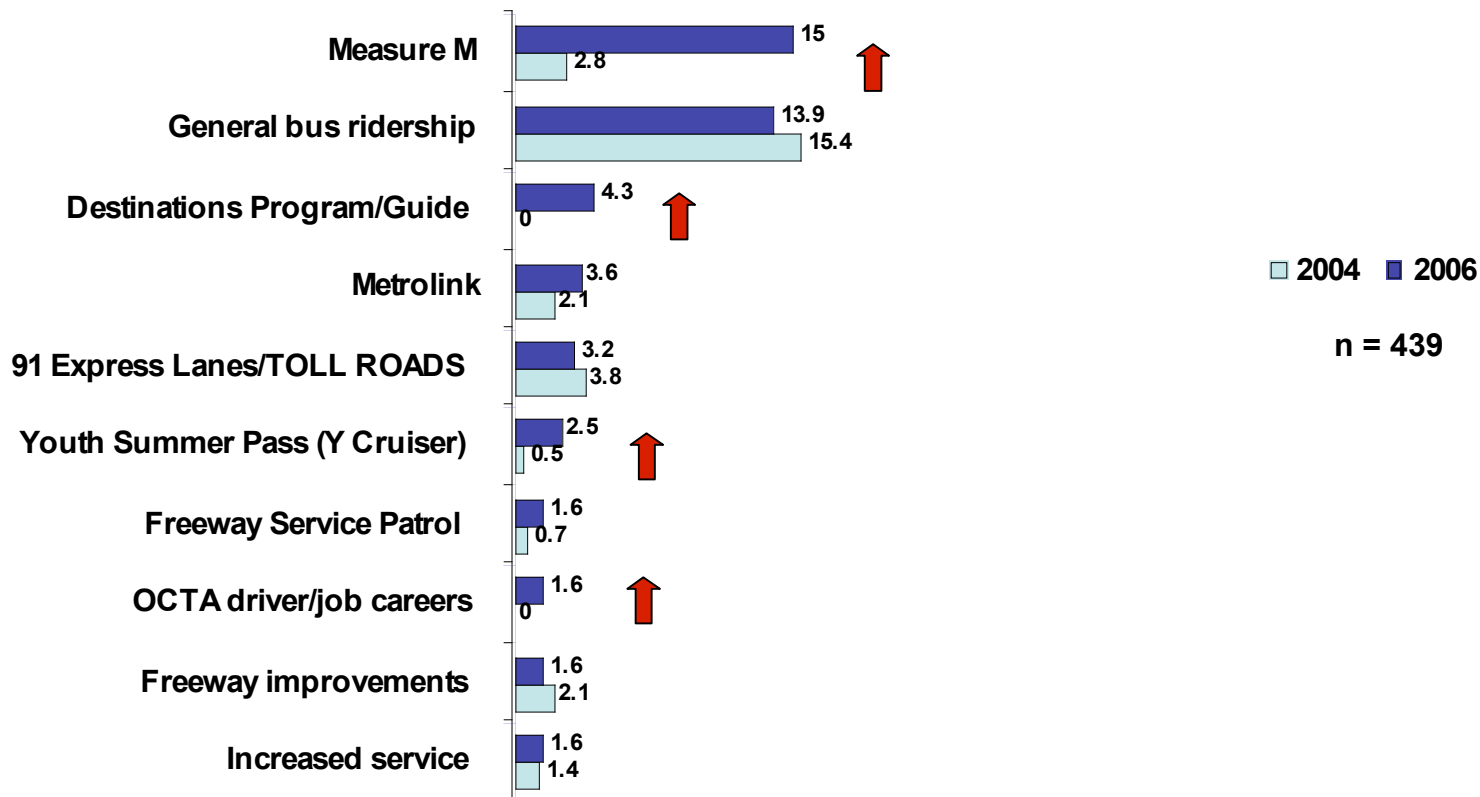


- Of those who had seen or heard advertising in the past 6 months, the majority saw or heard messages from the newspaper and exterior bus signage, despite significant decreases from 2004
- Those who received an advertising message through the mail increased significantly from the 2004 study





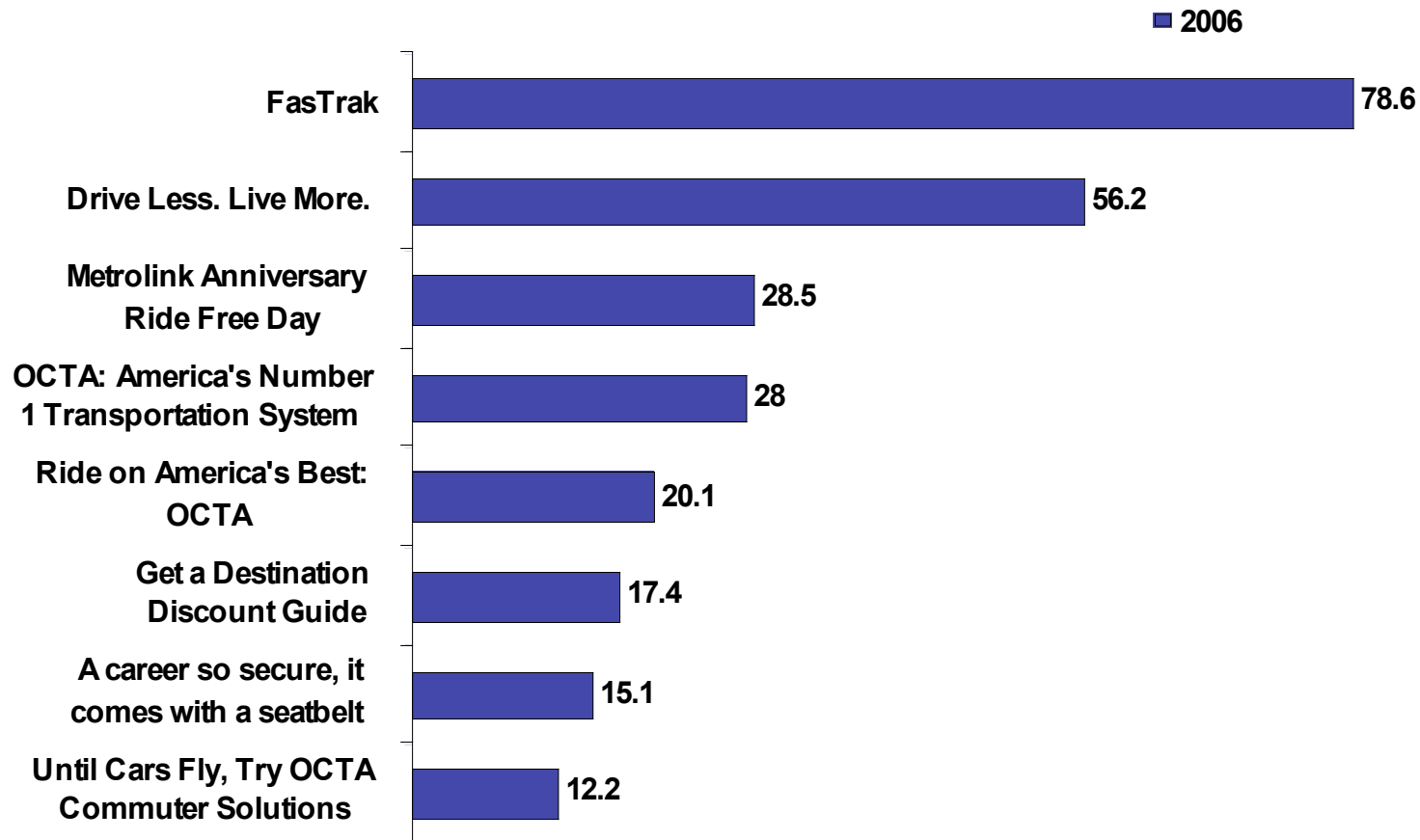
- The majority of respondents said the advertising message they saw or heard was about Measure M, a significant increase from the 2004 study
- General bus ridership is also an advertising message many respondents saw or heard



Q14. What was the OCTA advertising about?
Top ten responses only

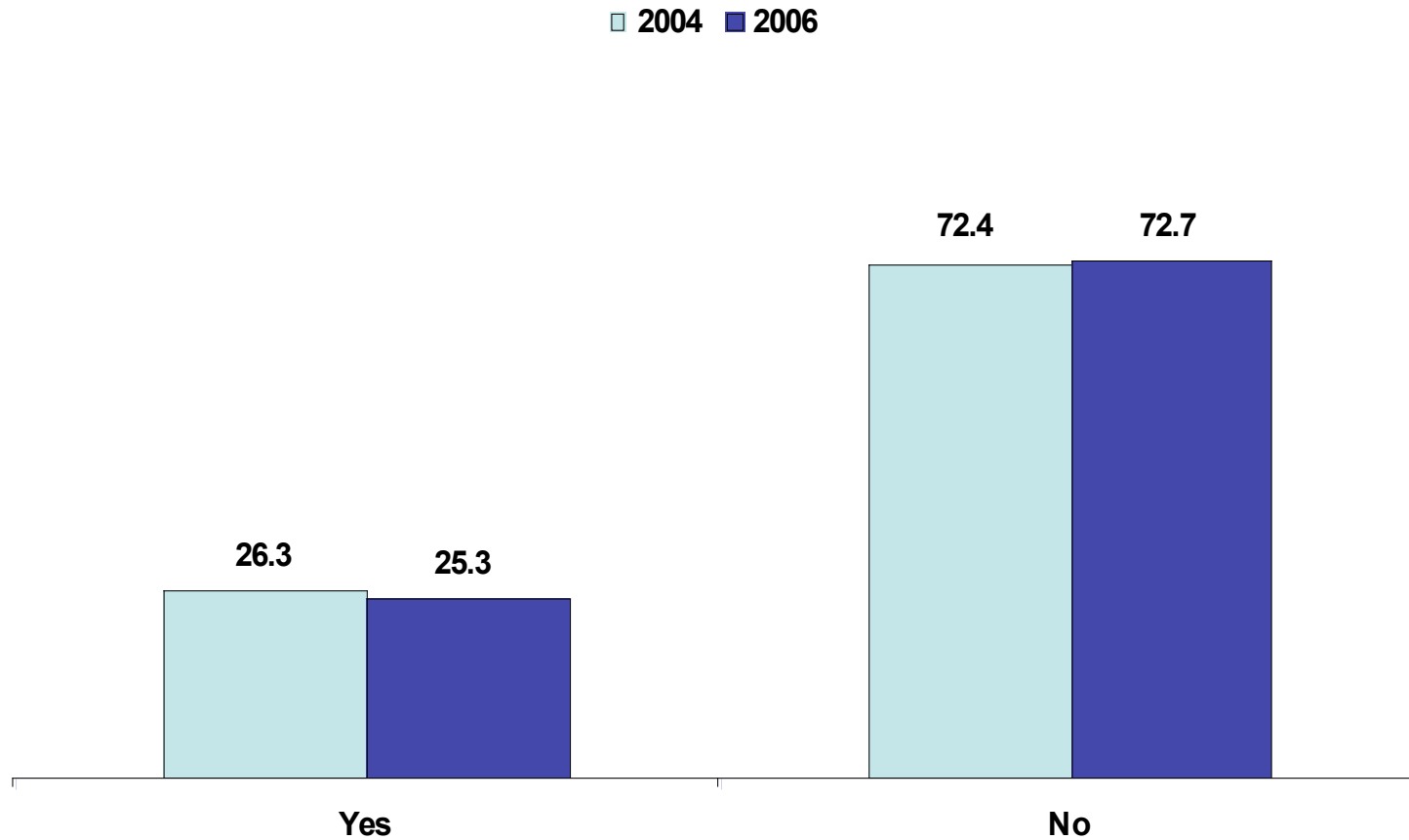


- Over three-fourths of respondents said that the advertising message/slogan they saw or heard is FasTrak, while over half saw or heard the message Drive Less. Live More.



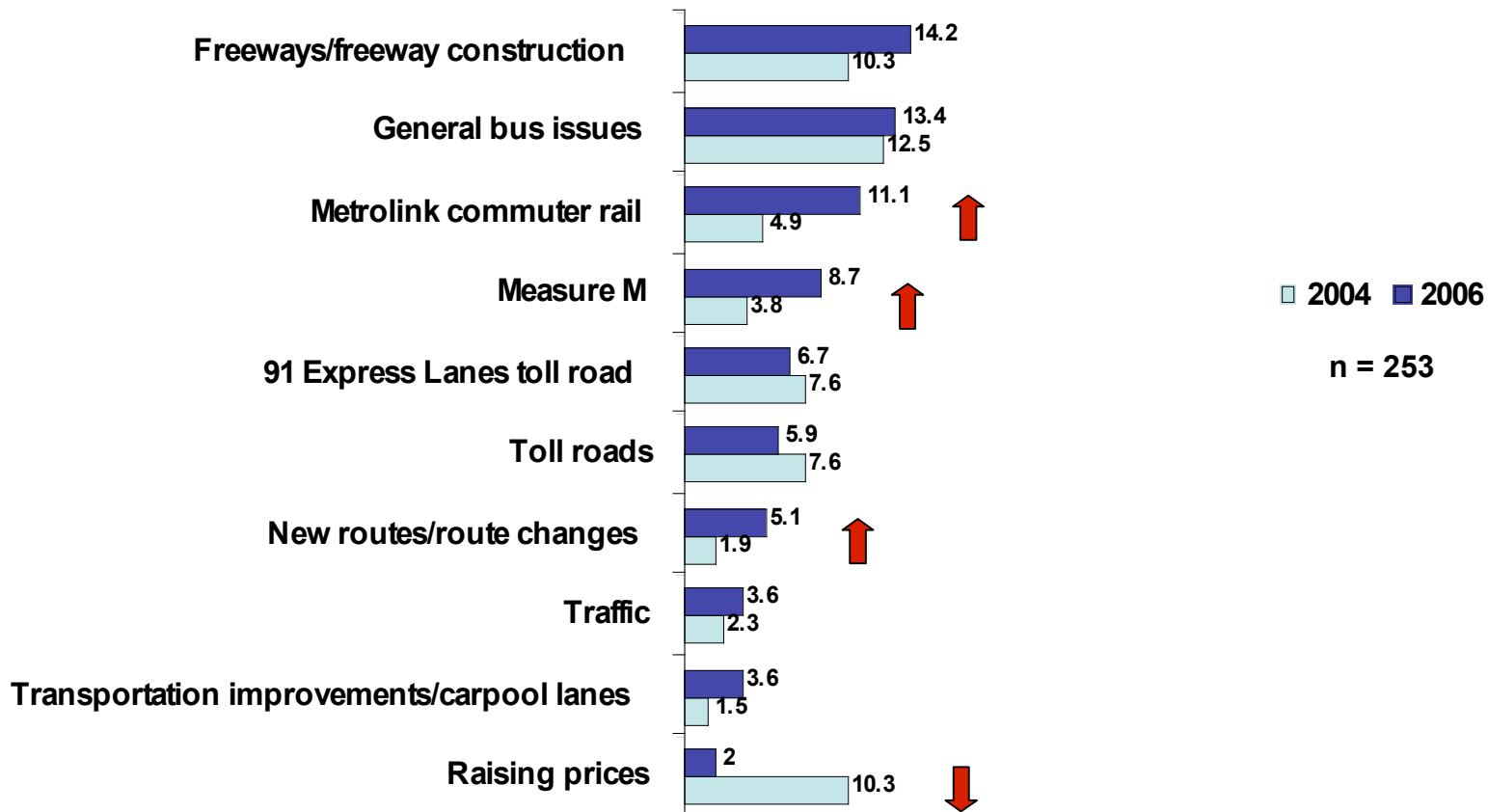


- Only one in four respondents said that they had seen, heard or read news stories about OCTA in the past six months





- More respondents saw, heard or read news stories about freeway construction and general bus issues than any other issue



Q17. What were those OCTA news stories about?
Top ten responses only

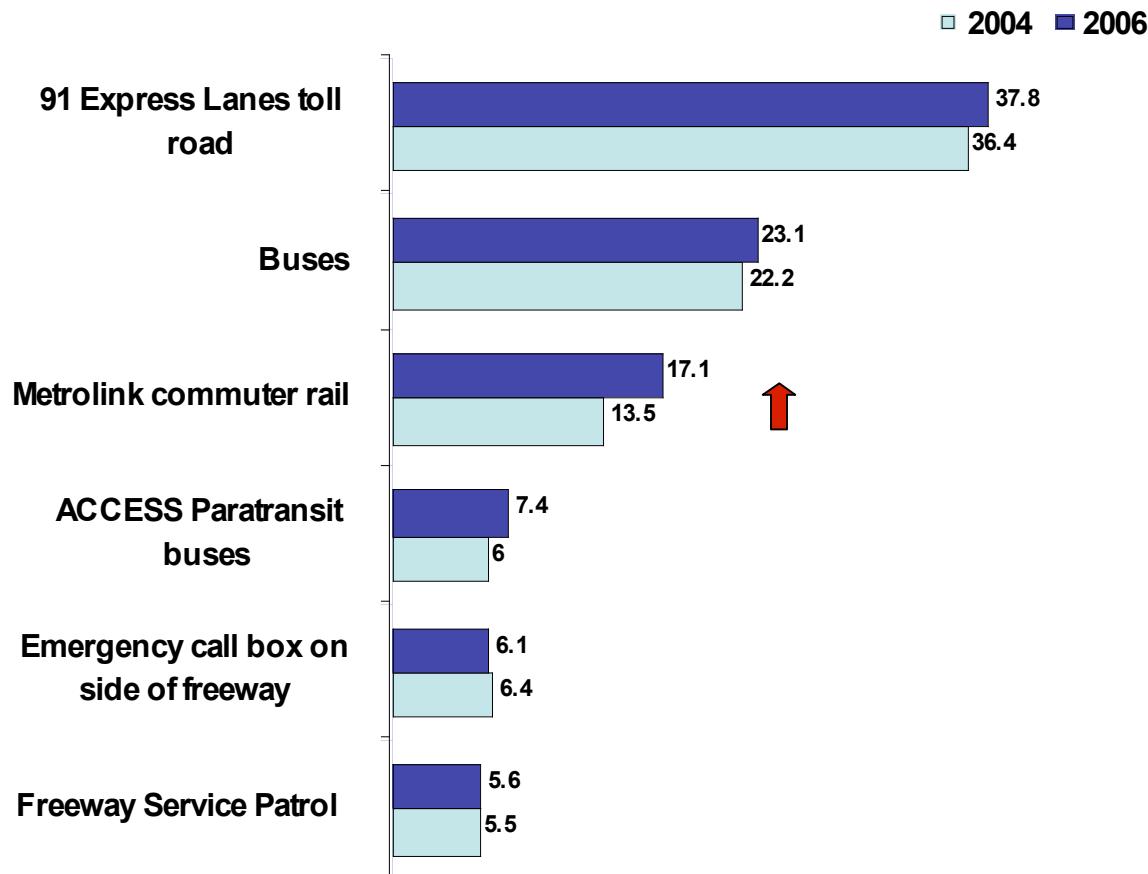


OCTA Service Usage



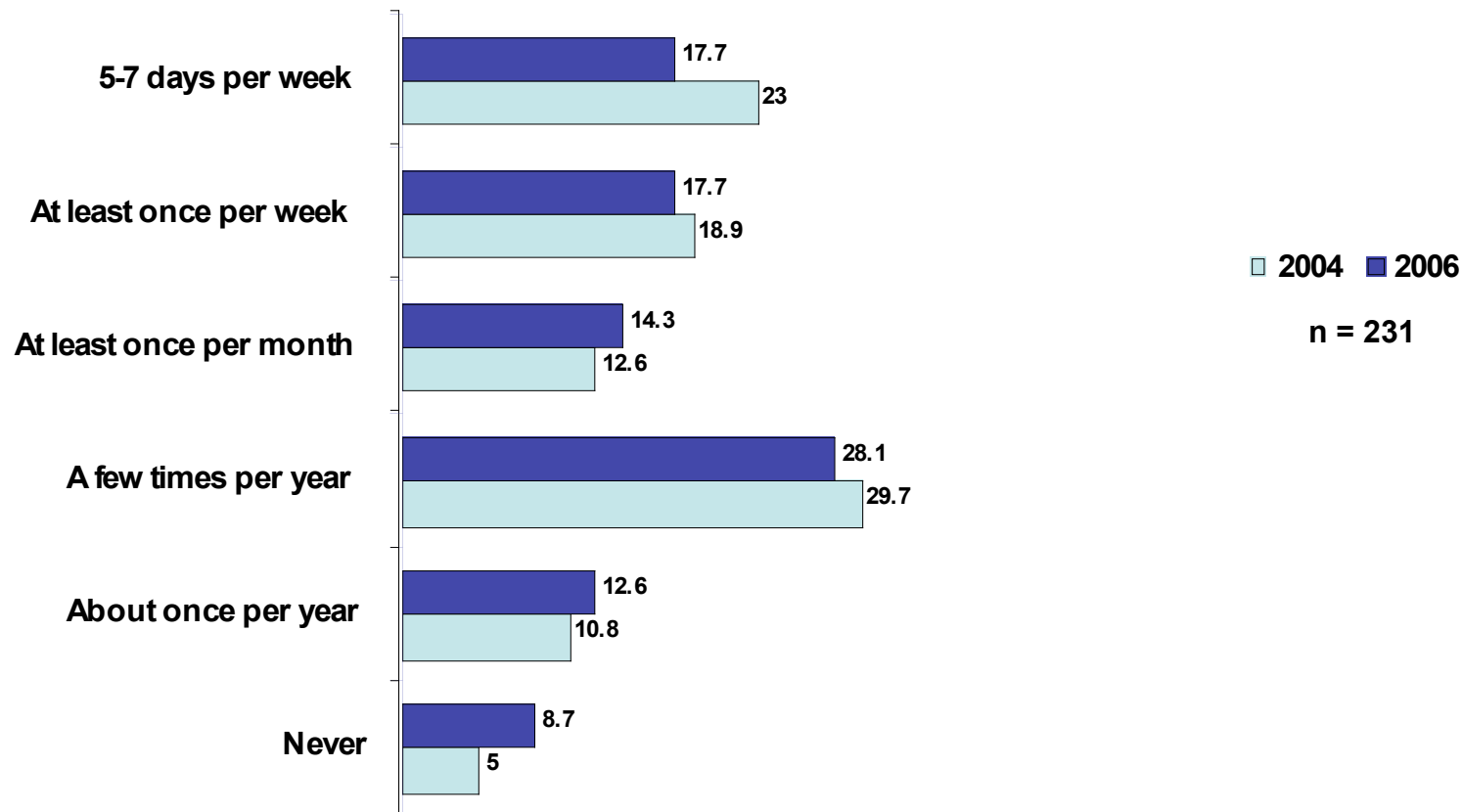


- In the past 12 months, the 91 Express Lanes toll road was used more than any other OCTA service
- Those who used Metrolink commuter rail increased significantly compared to the 2004 study



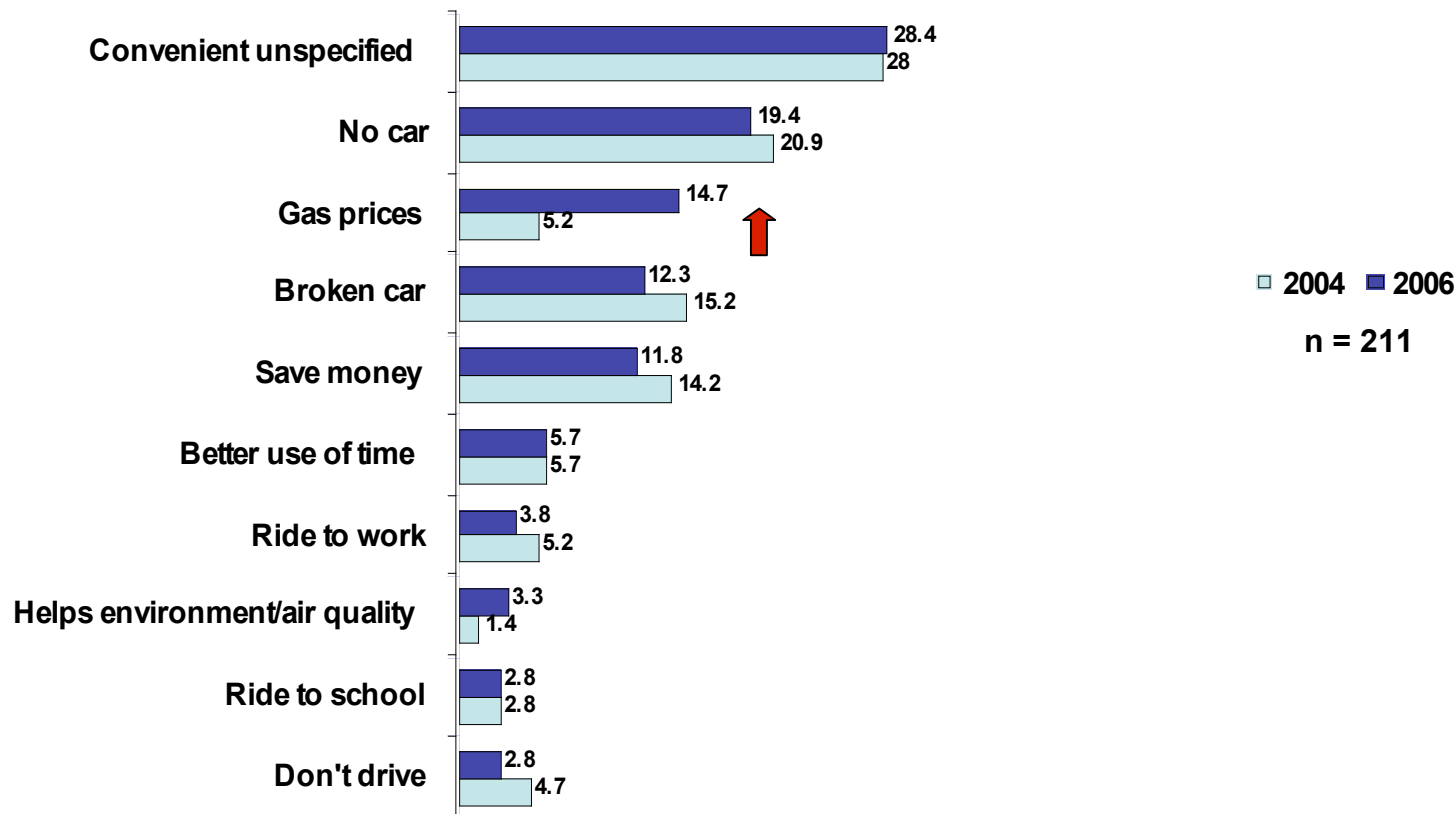


- Of those who have ridden an OCTA bus in the past 12 months, 35.4% of respondents are riding at least once a week, compared to 41.9% in 2004





- The majority of respondents continue to ride the OCTA bus for convenience or lack of a car
- Compared to the 2004 study, a significantly greater amount of people ride the OCTA bus more because of gas prices

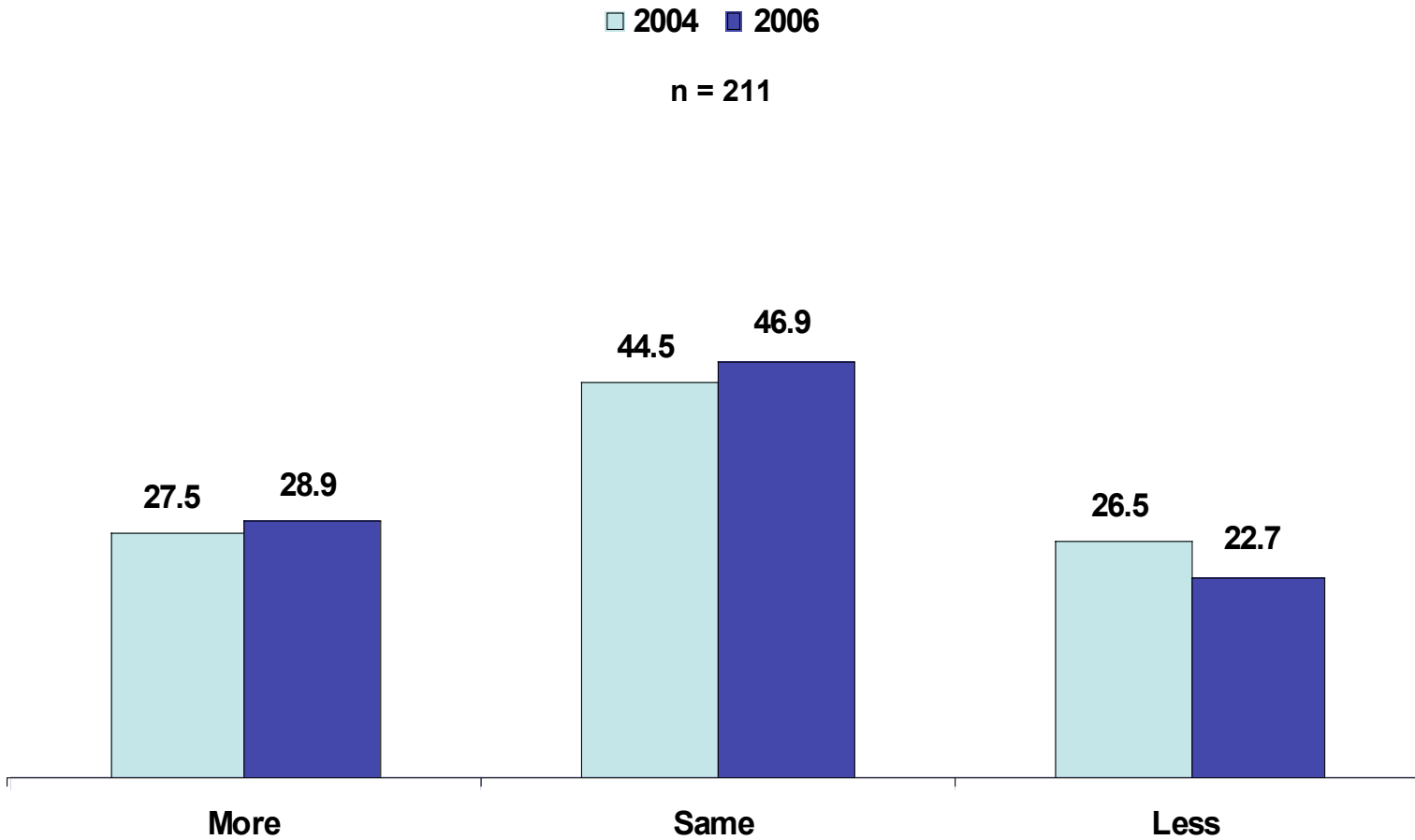


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Q20. Why do you ride the OCTA bus instead of using other means of transportation?
Top ten responses only



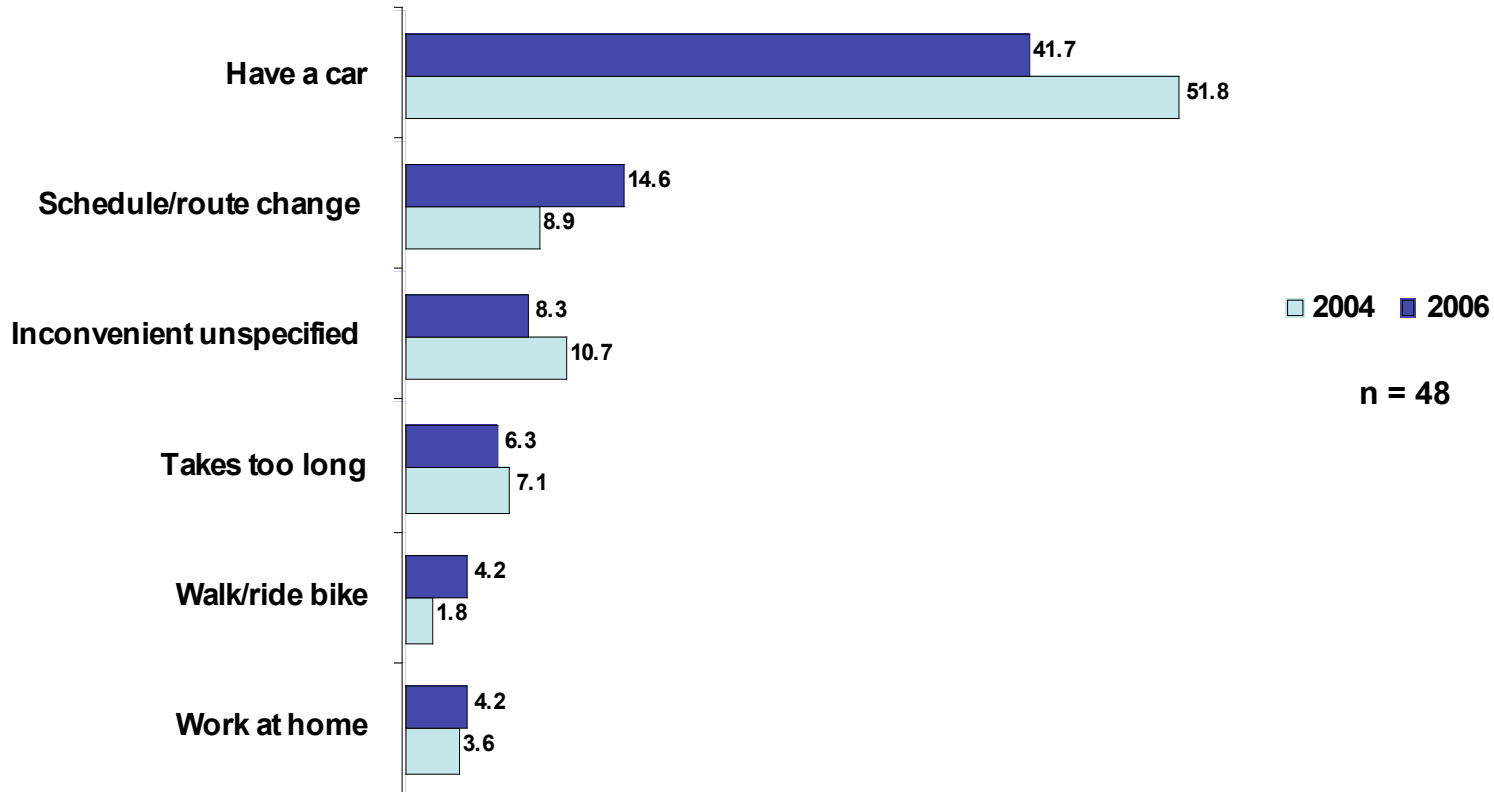
- Most people are riding the bus more often or about the same as last year



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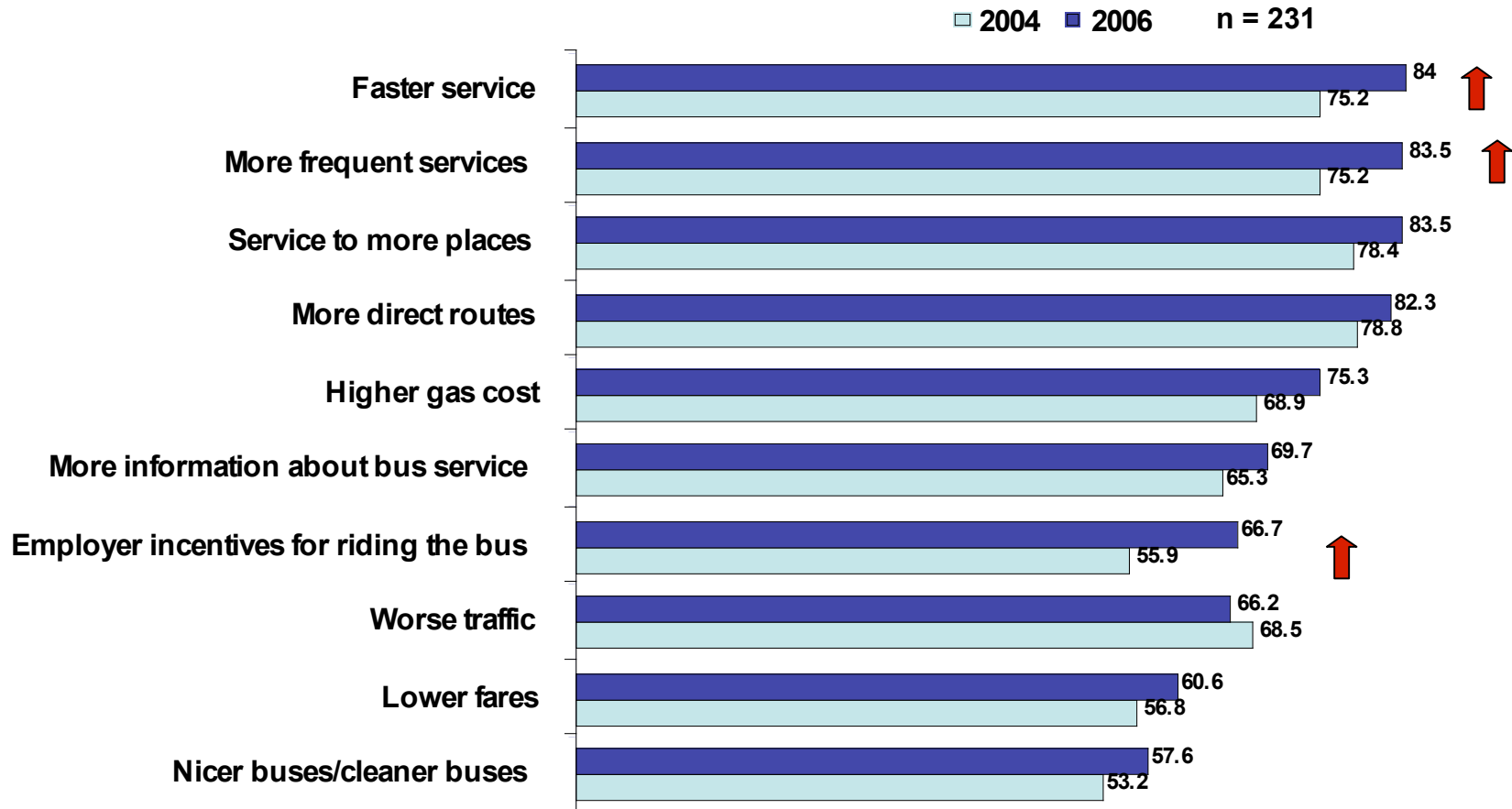


- Of those riding the bus less often than last year, the most common reason is because they now have a car





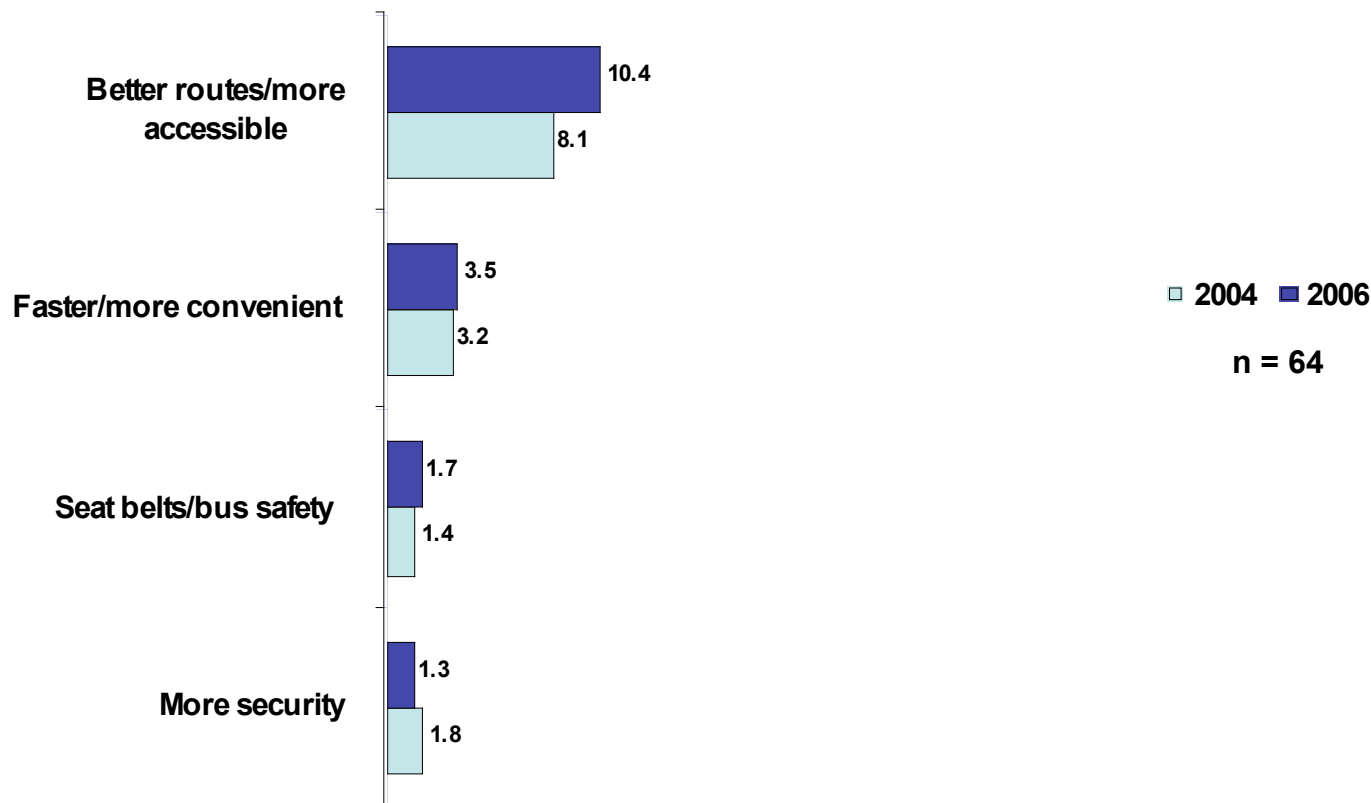
- The top three reasons respondents would ride the bus more often are: faster service, more frequent service and service to more places; the top two reasons are significant increases from the 2004 study



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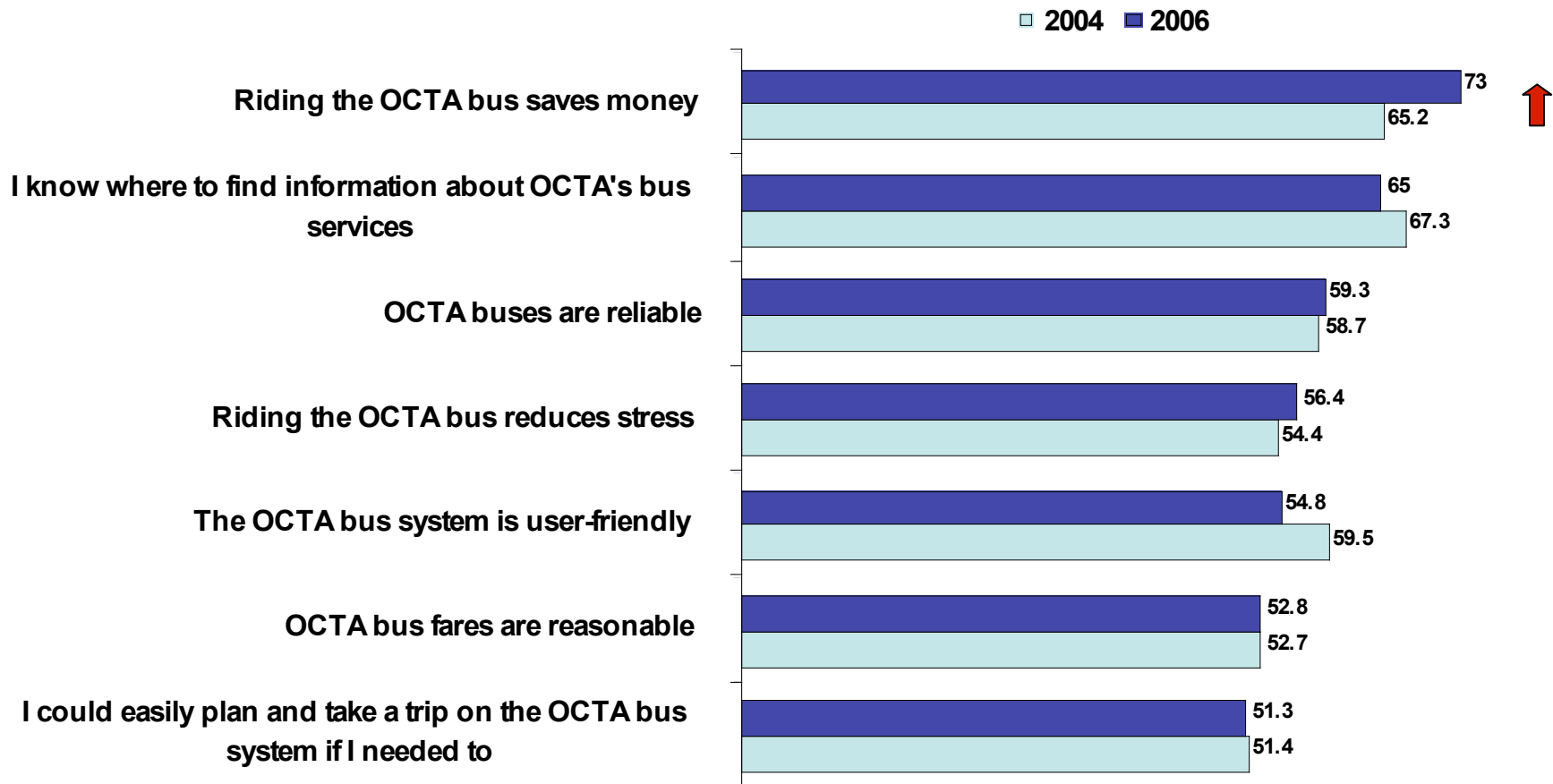


- Of those respondents who have another reason that would get them to ride the bus more often, better/more accessible routes was the most popular answer





- The majority of respondents agree that riding the bus saves money, a significant increase from the 2004 study

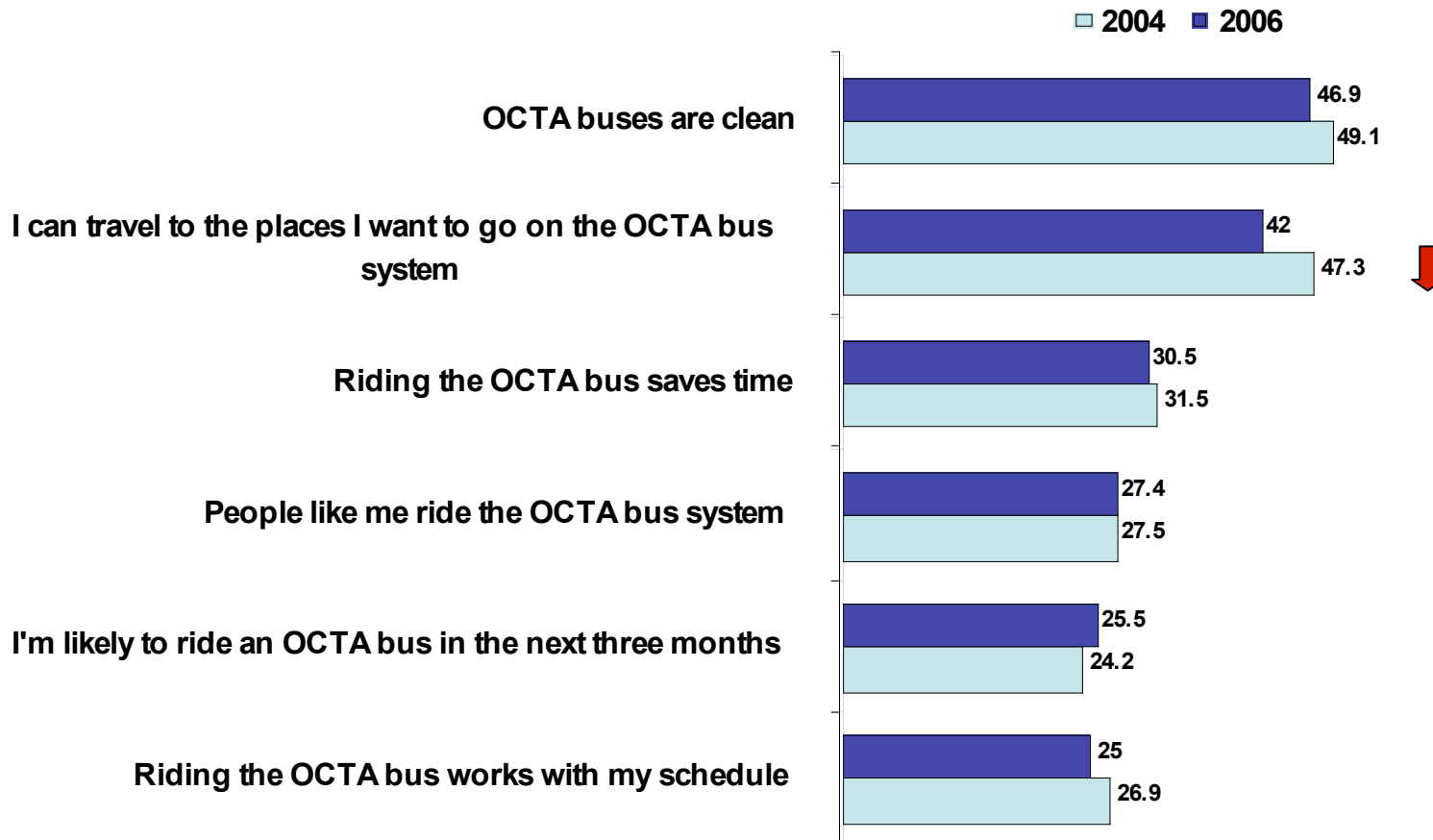


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Q24 continued . . .

- Compared to the 2004 study, significantly fewer respondents agree that they can travel to the place they want to go on the OCTA bus system





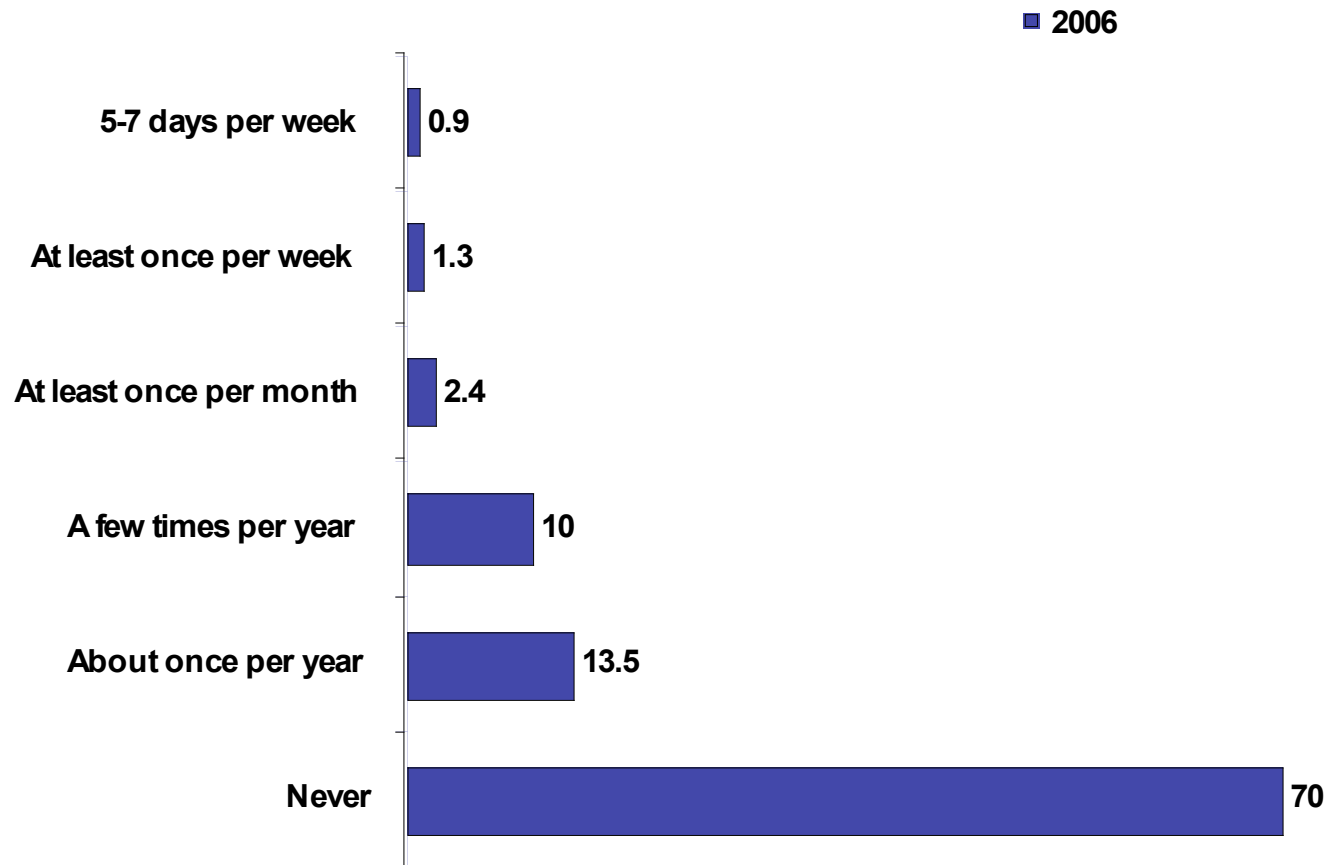
Metrolink Usage

Not surveyed in the 2004 study



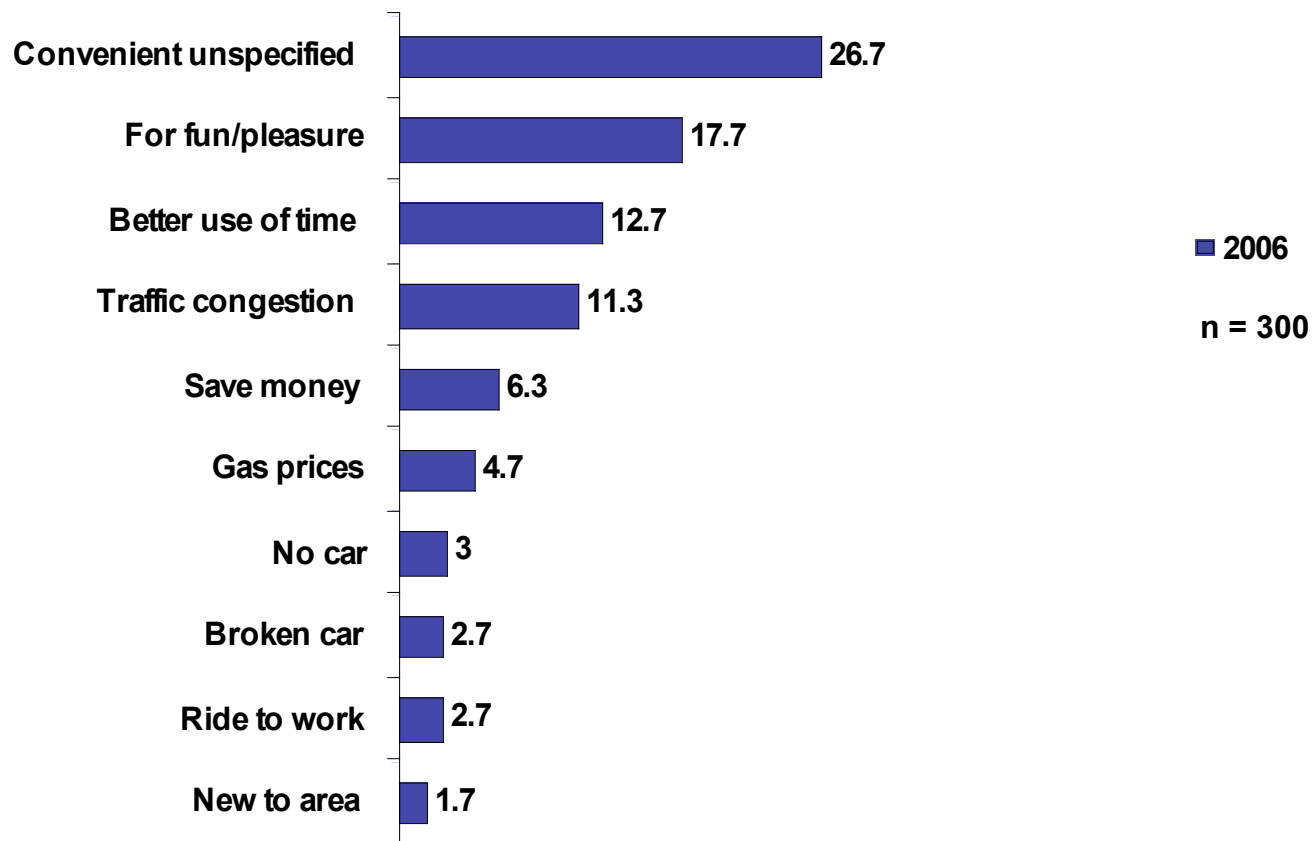


- The majority of respondents never ride the Metrolink; one in ten ride it a few times per year



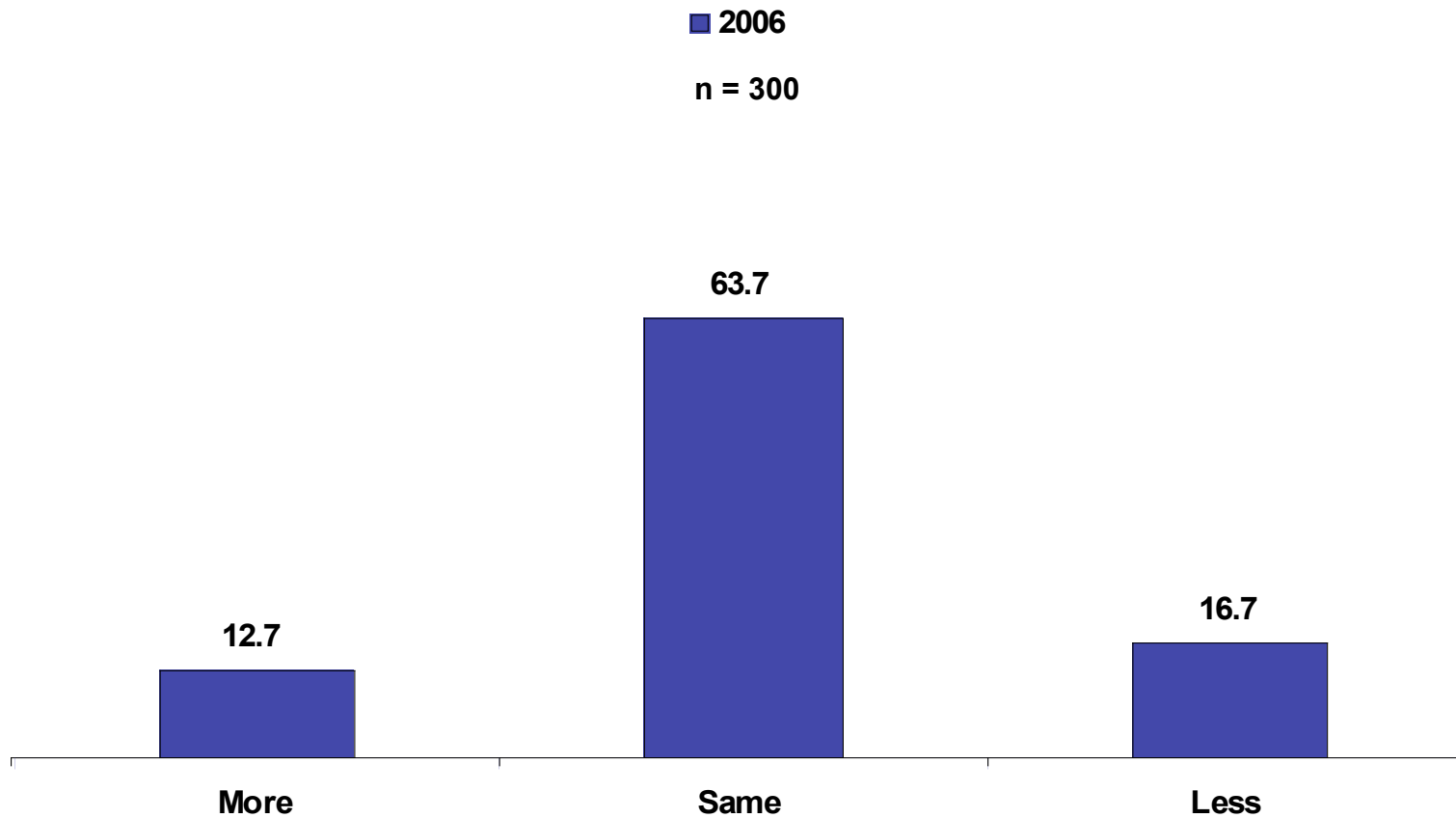


- The most popular reason for riding Metrolink is convenience
- Many respondents also ride the Metrolink for fun/pleasure





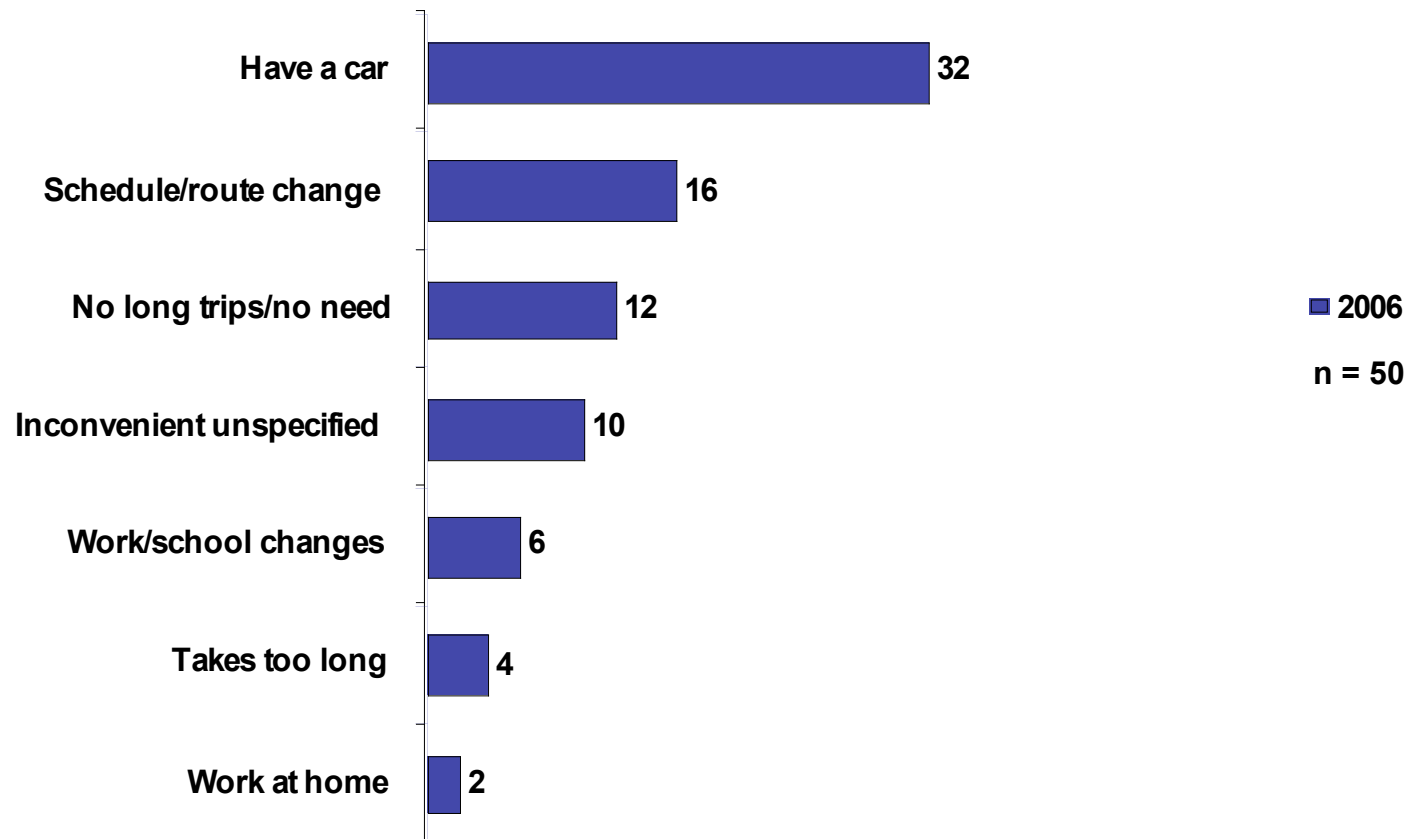
- 12.7% are riding the Metrolink more often, while 16.7% are riding it less often than last year



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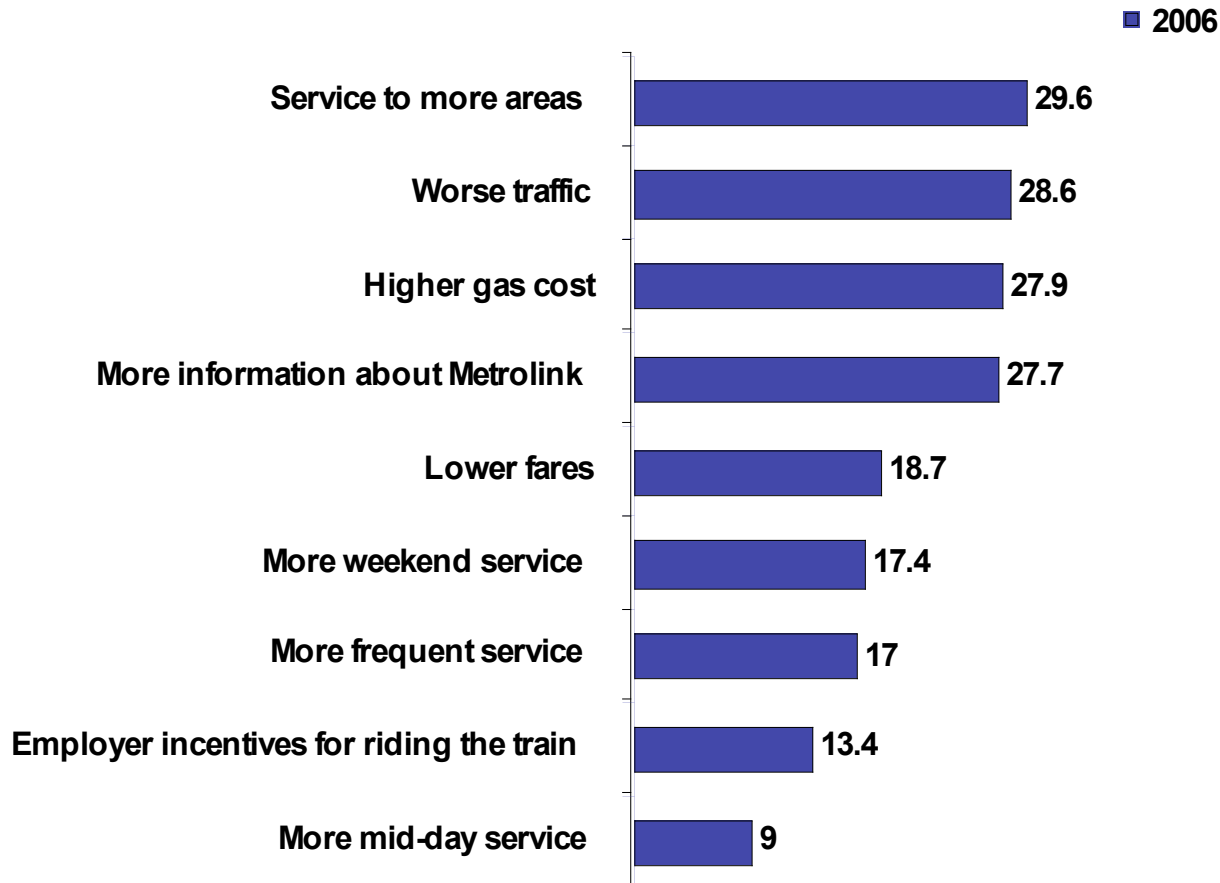


- Of those who ride the Metrolink less often than last year, having a car is the main reason
- Schedule/route change and no need are the next most popular reasons people rode the Metrolink less than last year



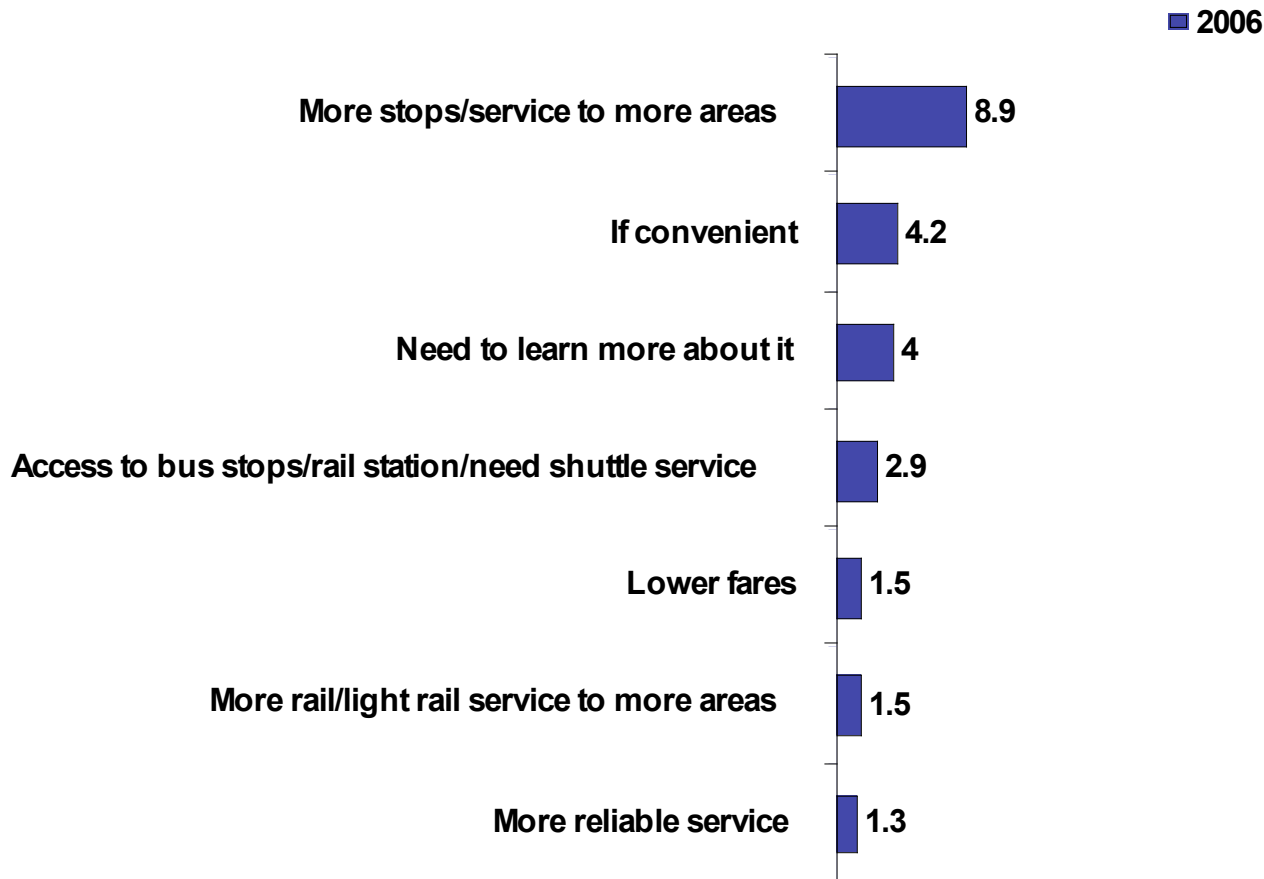


- Service to more areas, worse traffic, higher gas cost, and more information about Metrolink are all common reasons that would increase ridership





- Of those respondents who have another reason that would get them to ride the Metrolink more often, more stops/service to more areas is the most popular answer



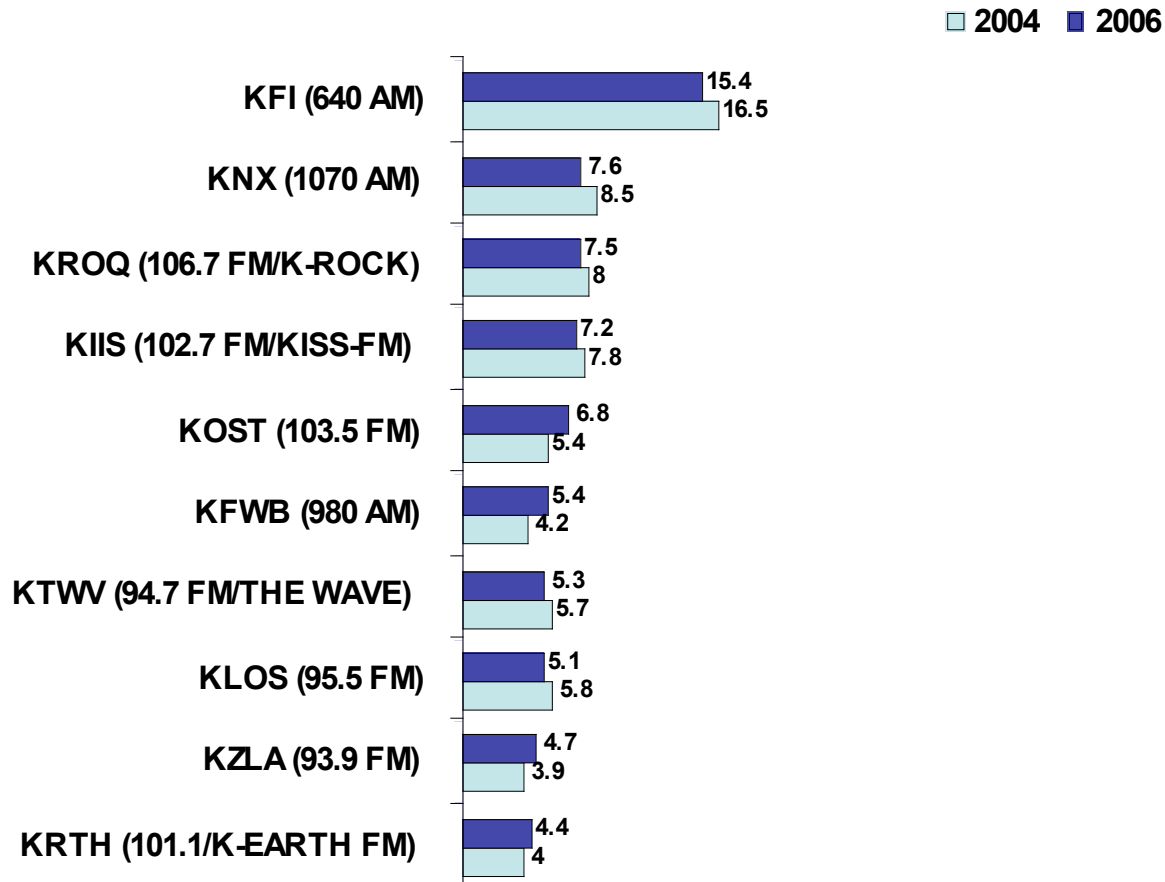


Media Usage



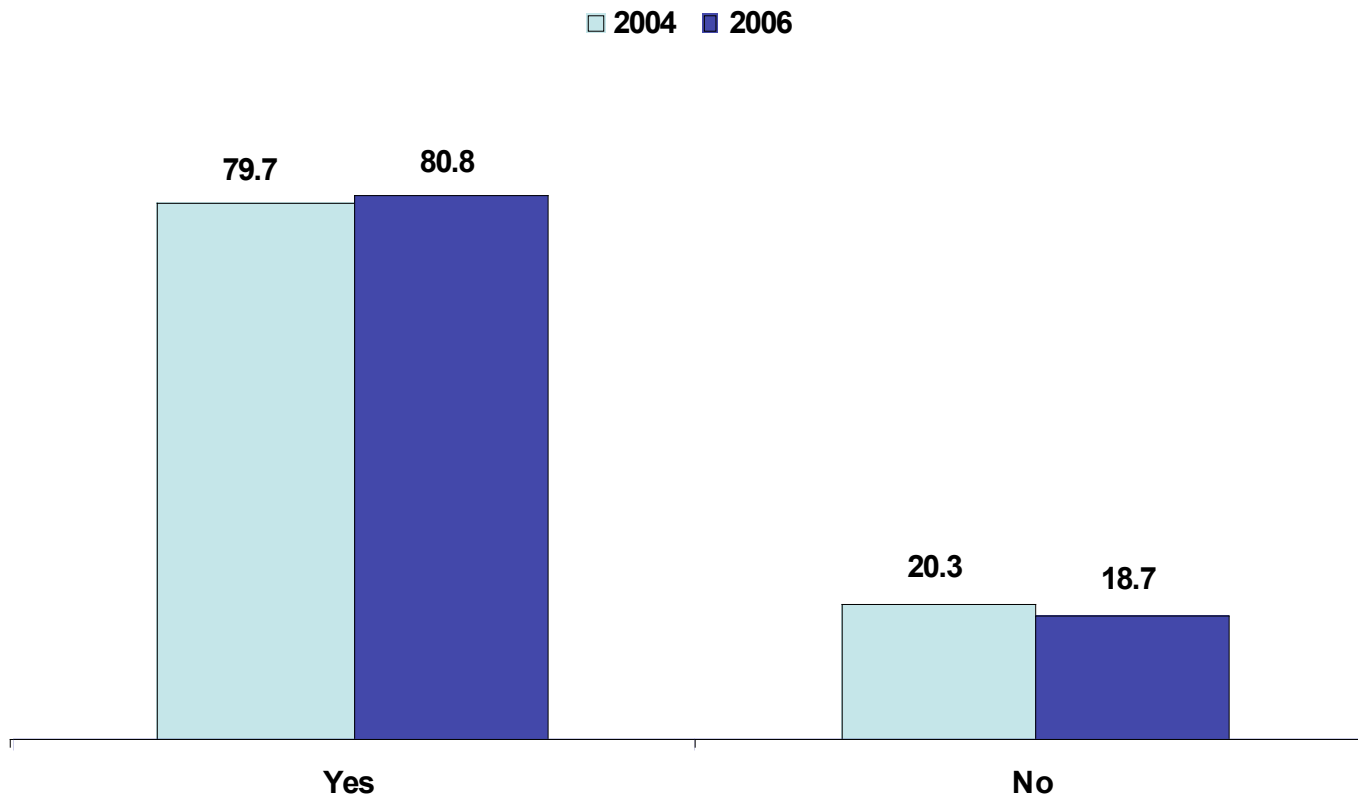


- KFI (640 AM) is the most listened to radio station





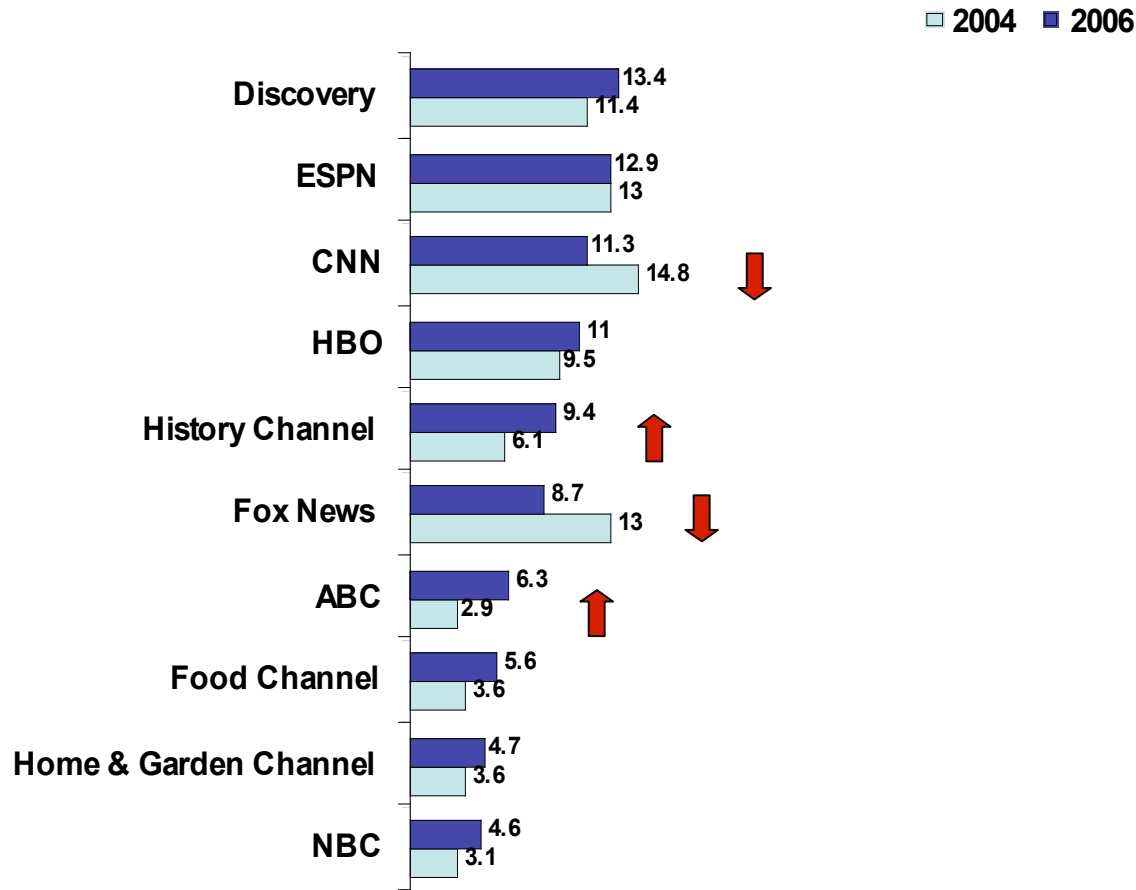
- Eight out of ten households subscribe to cable television



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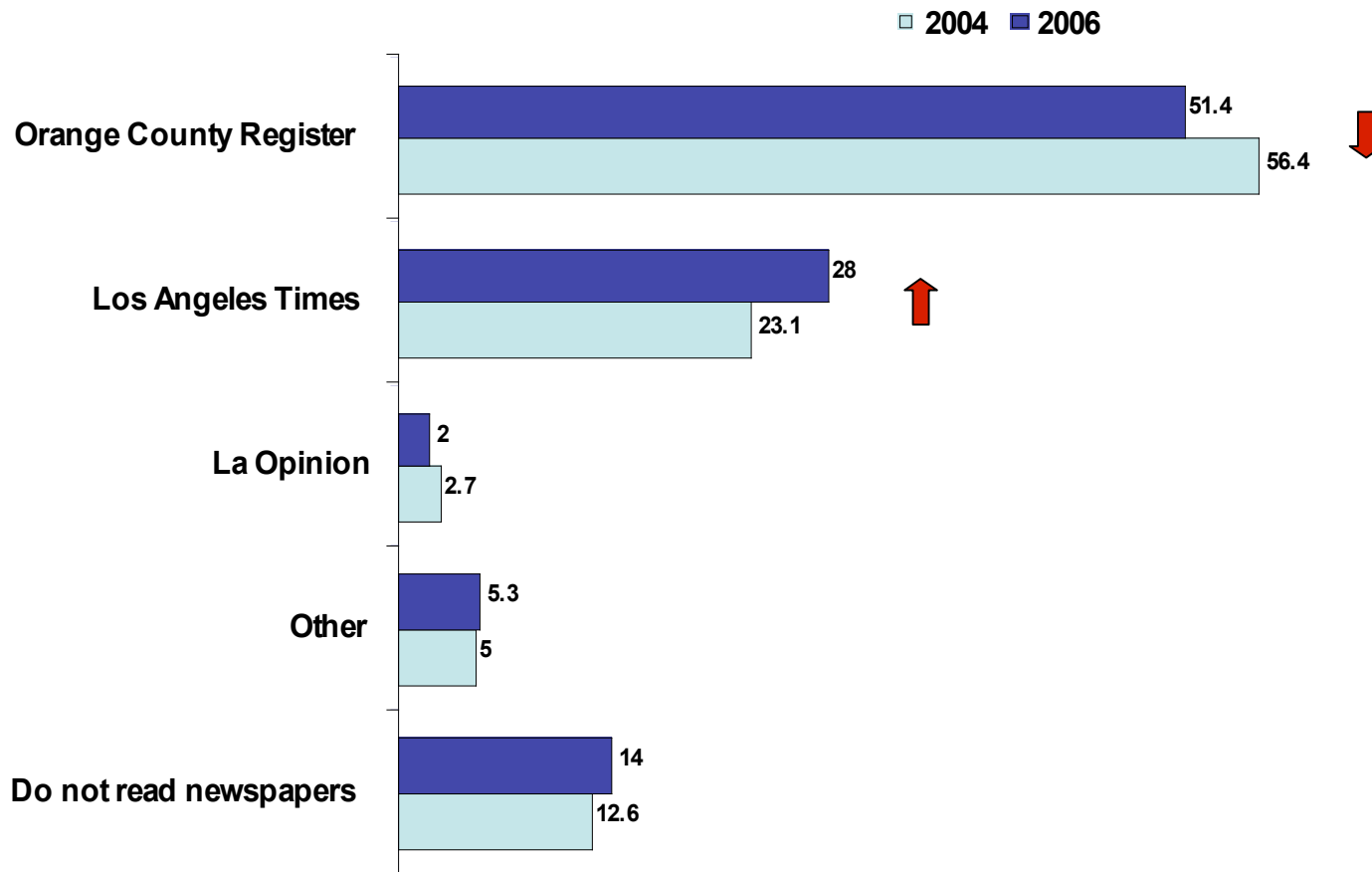


- Discovery, ESPN, CNN, and HBO are the most watched cable stations



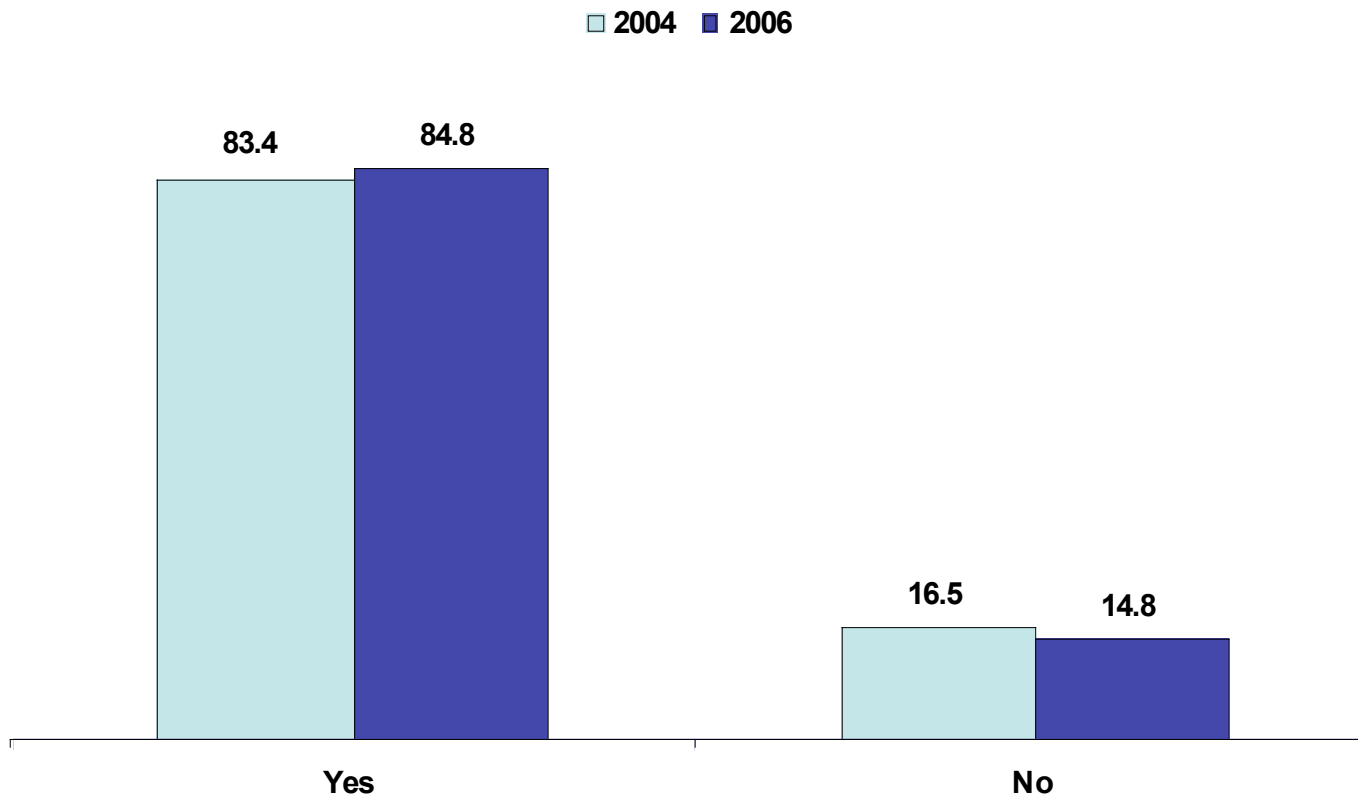


- Half of all respondents read the Orange County Register
- Compared to the 2004 study, the percentage who read the LA Times most often increased significantly





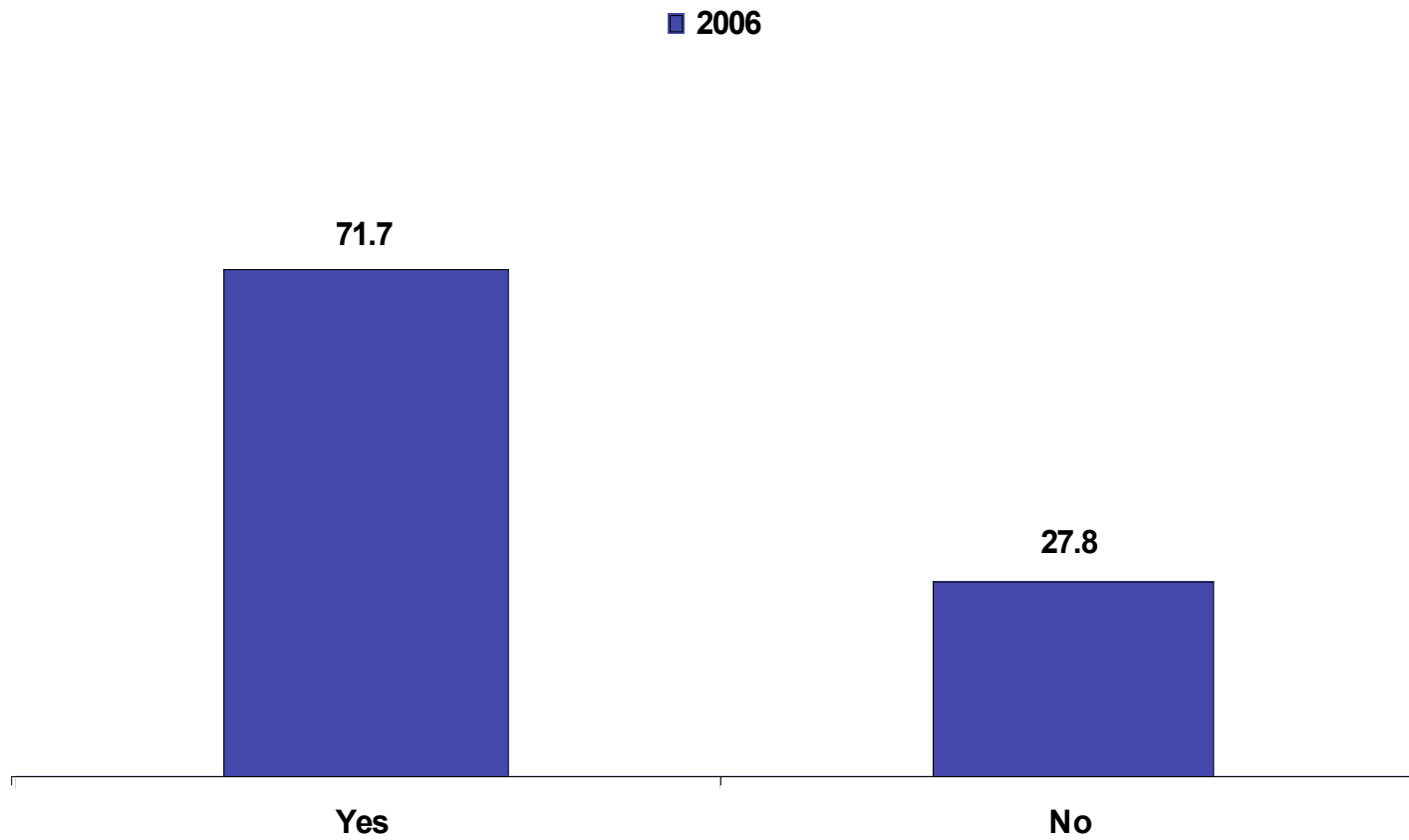
- The majority of respondents have access to the Internet at home, school or work



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- Seven out of ten respondents use a cell phone on a daily basis





Demographics





Demographics

	<u>2004</u>	<u>2006</u>
• Mean household drivers:	2.14	2.17
• Mean registered vehicles/household:	2.34	2.41
• Those who have ridden:		
• A public transit bus	79%	77.1%
• Light rail or streetcars	57%	63% ↑
• Heavy rail or commuter trains	56.5%	61% ↑
• Monorail	48.2%	48.9%
• Bus rapid transit	44.2%	42.5%
• Favorable opinion of public transit (<i>top two box</i>):	70.6%	67.9%



Represents significant change from 2004 study to 2006 study



Demographics

	<u>2004</u>	<u>2006</u>
• Residence:		
• Anaheim	11.2%	8.3% ↓
• Huntington Beach	6.5%	7.8%
• Irvine	5.8%	7.0%
• Laguna	7.0%	6.5%
• Santa Ana	7.5%	6.5%
• Garden Grove	3.0%	5.8% ↑
• Fullerton	3.9%	4.9%
• Rent or own home:		
• Own	63.1%	65.4%
• Rent	32.7%	29.7%



Represents significant change from 2004 study to 2006 study



Demographics

	<u>2004</u>	<u>2006</u>
• Work location:		
• Irvine	11.1%	10.2%
• Santa Ana	5.2%	7.1%
• Anaheim	7.8%	6.8%
• Costa Mesa	3.0%	3.8%
• Laguna	4.0%	3.6%
• Fullerton	2.9%	3.1%
• Newport Beach	2.9%	3.1%
• Employment status:		
• Employed	73.3%	69.6%
• Not employed	24.9%	28.0%



Represents significant change from 2004 study to 2006 study





Demographics

	<u>2004</u>	<u>2006</u>
• Registered to vote:	80.1%	80.4%
• Marital Status:		
• Married/living w/significant other	57%	59.7%
• Single	27.3%	23.4% ↓
• Divorced	8%	8%
• Widowed	5.6%	5.4%
• Children under 18 in household:	39.3%	37.5%



Represents significant change from 2004 study to 2006 study



Demographics

	<u>2004</u>	<u>2006</u>	
• Age categories:			
• 18 – 24	8.1%	6.7%	
• 25 – 34	17.1%	15.9%	
• 35 – 44	24.6%	20.6%	↓
• 45 – 54	21.7%	23.2%	
• 55 – 64	13.1%	15.2%	
• 65 or older	13.6%	16.2%	
– Mean	45.7	47.6	↑
• Gender:			
• Male	47.7%	44.2%	
• Female	52.3%	55.8%	



Represents significant change from 2004 study to 2006 study



Demographics

	<u>2004</u>	<u>2006</u>	
• Highest level of education:			
• Some high school or less	5.9%	6.3%	
• High school graduate	14.4%	12.8%	
• Some college/tech school	32.6%	26.3%	↓
• Undergraduate degree	27.5%	22.6%	↓
• Graduate degree	17.9	29.7%	↑
• Ethnic origin:			
• Caucasian/white	63.9%	66.3%	
• Hispanic/Latino	20.2%	19.3%	
• Asian	7.1%	6.5%	
• African American/Black	1.8%	1.5%	
• American Indian	1.2%	0.6%	



Represents significant change from 2004 study to 2006 study



Demographics

	<u>2004</u>	<u>2006</u>
• Annual household income:		
• Under \$15,000	5.6%	4.5%
• \$15,000 – \$24,999	9.2%	6.2% ↓
• \$25,000 – \$34,999	6.9%	6.4%
• \$35,000 – \$49,999	10.2%	10.6%
• \$50,000 – \$74,999	15%	13.7%
• \$75,000 – \$99,999	15.2%	15.2%
• \$100,000 or more	23.2%	27.3% ↑
– Mean	\$67,500	\$72,300 ↑
• Language of interview:		
• English	89.3%	91.2%
• Spanish	10.7%	8.8%



Represents significant change from 2004 study to 2006 study



Demographics of Metrolink Riders





Demographics

	<u>2006</u>
• Mean household drivers:	2.21
• Mean registered vehicles/household:	2.44
• Those who have ridden:	
• Light rail or streetcars	83.3%
• A public transit bus	82.7%
• Heavy rail or commuter trains	79.3%
• Monorail	54.0%
• Bus rapid transit	50%
• Favorable opinion of public transit (<i>top two box</i>):	74.3%



Demographics

2006

- Residence:
 - Anaheim **8.7%**
 - Laguna **8%**
 - Irvine **7.7%**
 - Huntington Beach **6.7%**
 - Fullerton **6.3%**
 - Mission Viejo **5%**
 - Santa Ana **5%**

- Rent or own home:
 - Own **65.7%**
 - Rent **28.7%**



Demographics

	<u>2006</u>
• Work location:	
• Irvine	12.3%
• Santa Ana	8.7%
• Anaheim	7.3%
• Fullerton	5.7%
• Orange	4%
• Newport Beach	3.7%
• Los Angeles	3.3%
• Employment status:	
• Employed	71.7%
• Not employed	25.3%



Demographics

	<u>2006</u>
• Registered to vote:	84.7%
• Marital Status:	
• Married/living w/significant other	62%
• Single	23.7%
• Divorced	6.7%
• Widowed	4.7%
• Children under 18 in household:	35.7%



Demographics

	<u>2006</u>
• Age categories:	
• 18 – 24	7.7%
• 25 – 34	15.7%
• 35 – 44	23.7%
• 45 – 54	19%
• 55 – 64	16%
• 65 or older	16%
– Mean	47.1
• Gender:	
• Male	48.3%
• Female	51.7%





Demographics

2006

- Highest level of education:
 - Some high school or less **4.7%**
 - High school graduate **12.3%**
 - Some college/tech school **25%**
 - Undergraduate degree **20.3%**
 - Graduate degree **35.3%**

- Ethnic origin:
 - Caucasian/white **66%**
 - Hispanic/Latino **18.3%**
 - Asian **5.7%**
 - Multiracial/Mixed **2.3%**
 - Middle Eastern **1.3%**



Demographics

2006

- Annual household income:
 - Under \$15,000 **4%**
 - \$15,000 – \$24,999 **5.7%**
 - \$25,000 – \$34,999 **7.7%**
 - \$35,000 – \$49,999 **9.7%**
 - \$50,000 – \$74,999 **13%**
 - \$75,000 – \$99,999 **15.3%**
 - \$100,000 or more **29%**
 - Mean **\$73,600**

- Language of interview:
 - English **93%**
 - Spanish **7%**





Conclusions and Implications





Conclusions and Implications

- Awareness of bus service is high; however, there are a number of services that have lower awareness.
 - Increase awareness of services that are a priority to OCTA by educating through advertising and PR messages
- 38% of respondents have a neutral or unfavorable impression of OCTA
 - Keep the community informed of the benefits and positive impact of the authority
- Although respondents feel OCTA is valuable to the community, they do not feel as strongly about the following statements:
 - OCTA listens to the general public and its customers
 - OCTA makes good use of public funds

OCTA should consider not only providing avenues for feedback, but finding ways to let customers know they are heard
- The OC Taxi Administration makes using a taxi safer was the lowest agreed upon statement and decreased significantly from the 2004 study
 - Considering that crime is the most important issue to respondents, the OCTA should consider focusing on increasing safety for taxi riders



Conclusions and Implications

- Of transportation issues that respondents felt were a priority, there were five that increased significantly from the 2004 study. The most important issue is developing long-range plans to study new transportation solutions. The other four are as follows:
 - Developing a bus rapid transit system
 - Add more Metrolink commuter rail service
 - Build more freeways
 - Develop countywide vanpool programLook at ways to address long term transportation issues and keep the public informed of such plans
- Just over one-third of respondents who have ridden the bus in the past 12 months, ride at least once a week, primarily for convenience
 - 29% of respondents are riding the bus more oftenAs a way to continue growth, focus on faster service, more frequent service and service to more places, all top reasons respondents said their ridership would increase
- Increase in gas prices have affected respondent's attitudes toward bus ridership
 - Gas prices as a reason for riding the bus has increased significantly from 2004
 - Most respondents agree that riding the bus saves money, a significant increase from 2004, which also may be influenced by high gas prices



Conclusions and Implications

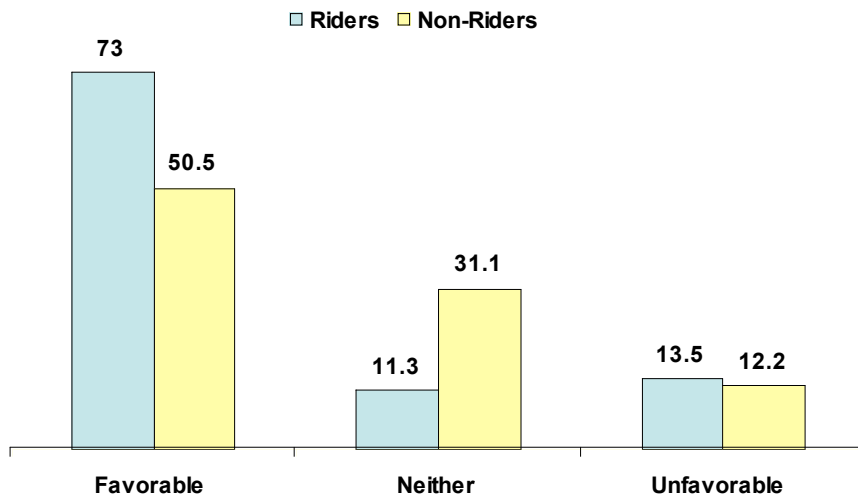
- While awareness of Metrolink is 61%, the percentage who never ride it is 70%
 - As a way to increase ridership, focus on servicing more areas and providing more information about Metrolink, both reasons respondents would ride more
- There are specific channels and stations that are used more frequently than others
 - Look at media usage and plan communication strategies accordingly





- On average, three-fourths of OCTA riders have a favorable impression of OCTA, while only half of non-riders have a favorable impression of the company. Non-riders tend to have a more neutral or unfavorable impression of OCTA

2004



2006

