APPENDIX C

TECHNICAL MEMORANDUM #2: Transit Survey Analysis







Lawrence-Douglas County MPO

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INTRODUCTION

The Coordinated System (CS) of Lawrence Transit and KU on Wheels is the primary public transportation operator serving the City of Lawrence, Kansas. The agency is currently evaluating its system performance and route structure as part of a Comprehensive Operational Analysis (COA). The COA consists of several large tasks, including a review of existing conditions, an assessment of travel demand, and a detailed evaluation of City of Lawrence services. Throughout this process CS, in consultation with Nelson\Nygaard, will conduct an extensive outreach process designed to both inform stakeholders and generate a community vision for the future of transit in the Lawrence region. This public input, along with the analysis generated throughout the COA process, will then be used to develop a series of service improvement recommendations.

This technical memorandum summarizes the on-board and online survey responses collected from April through November 2016. The on-board and online survey were largely the same; however, similar questions had to be worded differently on the two surveys in some cases because the online respondents were not on a vehicle when completing the survey. The survey was available in English and Spanish.

KEY FINDINGS

Nearly 1,200 community members completed the CS Survey, either online or on-board. Preliminary analysis of these survey efforts includes the following key findings:

- Existing riders rely heavily on local bus services, with a combined 76% of riders using the service either daily or weekly.
- Most riders reported that they are students (36%) or employed full-time (31%).
- A significant portion trips completed on the system are made between riders' homes and school, or vice versa.
- Survey respondents have a very positive perception of transit service in Lawrence, and are satisfied with current route alignments, fares, bus comfort and cleanliness, and the professionalism of transit staff.
- There is strong support for the addition of Sunday service, as well as increased evening service.
- Three main factors are responsible for transit use in Lawrence: lack of a personal vehicle, unavailable or expensive dedicated parking at a user's end destination, and the affordability of taking the bus (opposed to paying for gas and vehicle maintenance).



2 SURVEY RESPONSES

Surveys were collected online, via the study website, and from surveys administered to riders on-board transit vehicles. On-board surveys were conducted on all city and university routes in April 2016. The survey instrument is shown in Appendix B-1. As of November 30, 2016, 1,137 respondents had completed the CS Survey: 330 respondents completed the survey online and 807 respondents completed the survey on-board a transit vehicle.

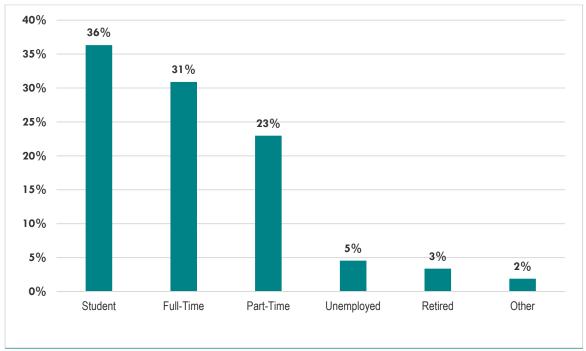
RESPONDENT DEMOGRAPHICS

Based on survey responses, the typical CS rider is either employed or a student and has a household income significantly below the metropolitan area median.

Employment Status

Just over half of survey respondents reported being employed in either a full-time (31%) or part-time (23%) position (Figure 1). Equally important, nearly 40% of respondents were students. A further 5% of respondents were unemployed at the time of the survey, while 3% are retired. Around 2% of respondents answered "Other," with the most common response being "disabled."

Figure 1 | Employment Status of Survey Respondents





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Household Income

Over three-quarters of survey respondents reported living in households with annual incomes below the Douglas County median income (\$50,732). One-third of respondents report household incomes of less than \$10,000, and 63% earn less than \$30,000 (Figure 2). Only 24% of respondents' households earn over \$50,000. This finding suggests that many transit riders in Lawrence live at or significantly below the poverty line.

Household income figures also reflect a younger demographic that is focused on education and is not fully employed in the workforce. With a large rate of participation from students, it is possible that some students are financially dependent on a guardian or did not report scholarships or stipends as income. Therefore, the percentage of respondents with a household income less than \$30,000 may be inflated.



Figure 2 | Annual Income of Survey Respondent Households

¹ United States Census, QuickFacts. Douglas County, Kansas: http://www.census.gov/quickfacts/table/INC110214/20045



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Gender

Respondents were slightly more likely to be female (51%) compared to male (49%) (Figure 3). Nationally, 55% of transit trips are taken by females.²

50%

50%

40%

30%

10%

Female

Total respondents: 999

Figure 3 | Gender of Respondents

Age

The majority of survey respondents-53%—are college age, between 18 and 25 years old (Figure 4). This result is not surprising since Lawrence Transit and KU on Wheels service is fully coordinated, and students can ride any bus for free with their KU identification.

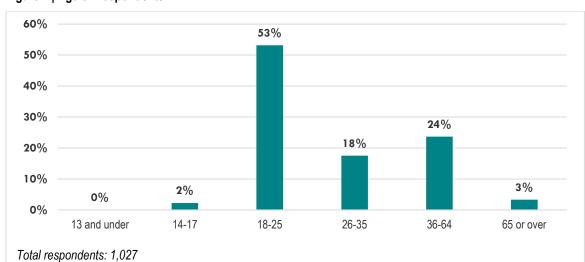


Figure 4 | Age of Respondents

² American Public Transportation Association: <u>A Profile of Public Transportation Passenger Demographics and Travel Characteristics Reported in On-Board Surveys.</u>



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TRANSIT RELIANCE

Many CS riders rely on local transit services as their primary means of transportation. Nearly two-thirds of respondents ride transit almost every day, and 49% of respondents would rely on walking if transit services were unavailable.

Frequency of Use

Over three-quarters of respondents surveyed reported that they regularly rely on local bus services to provide mobility around Lawrence (Figure 5). Nearly 60% of survey respondents reported that they ride CS almost every day, while an additional 18% ride multiple times per week. A combined 15% of respondents report using local bus service a few times per month or on rare occasions, while only 8% of respondents indicated they do not use transit.

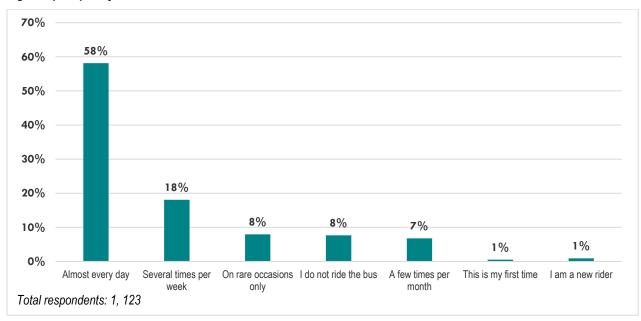


Figure 5 | Frequency of Use

Reasons for Using Transit

The survey asked existing transit riders to categorize the primary reasons they use local transit services. Respondents were able to select multiple answers to this question.

Over 40% of respondents are reliant on CS because they do not own a vehicle, cannot drive, or their car is temporarily out of service (Figure 6). Nearly a third of respondents use transit because parking at their destination is either unavailable or expensive, and an equivalent percentage ride because the bus is more affordable than paying for costs associated with driving. These findings further emphasize that many passengers are reliant on transit and ride largely because they do not have other options. Some passengers report riding for environmental reasons (20%) and others prefer using the downtime associated with being a passenger rather than driving (12%).



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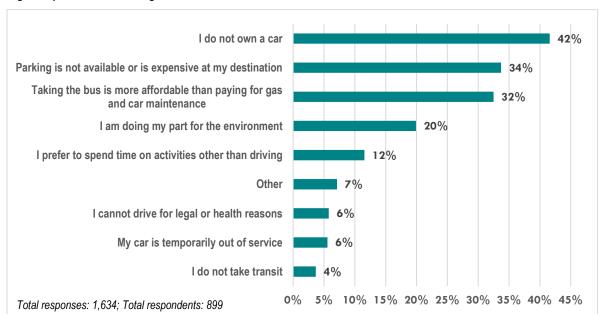
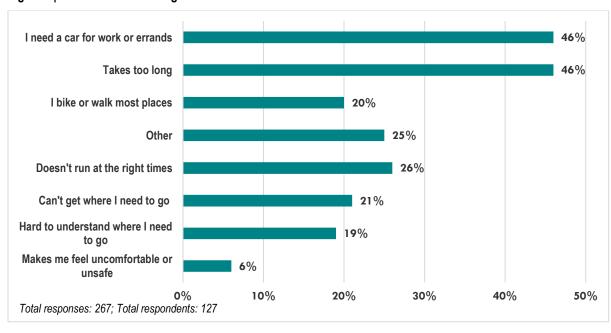


Figure 6 | Reasons for Using Transit

Reasons for Not Using Transit

Of online respondents who said they rarely or do not use transit, nearly 50% of respondents do not use CS because they need a personal vehicle for work or errands or service takes too long. However, nearly all respondents also indicated that they do not use transit due to service, operational, or informational concerns (Figure 7). The most common response given under "Other" is that driving is faster and more convenient. Very few respondents do not feel safe onboard the transit vehicles. Respondents were able to select multiple answers to this question.







Optimal Transit Use

If nothing was preventing survey respondents from using transit in Lawrence, shopping, recreational, and social activities are the primary trips users would make via local bus services. Commuting to and from work also recorded nearly a 30% response rate (Figure 8). Commuting to school represents a small subset, indicating that current non-users of the system are not students. This question was not included in the on-board survey and only answered by those who indicated that they rarely or never ride the bus.

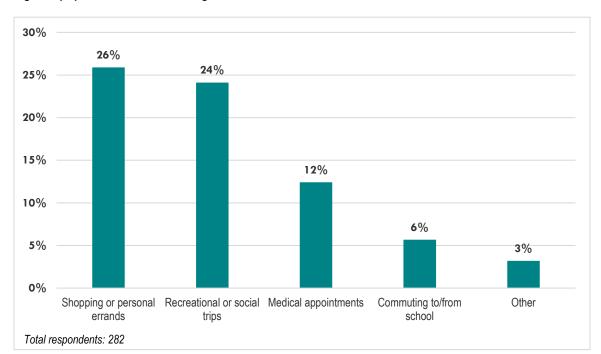


Figure 8 | Optimal Transit Use among Non-Transit Users

Primary Modes

Among respondents who rarely or do not take transit, over 50% said their primary mode of transportation was to drive alone (Figure 9). More than one-third of respondents (34%) indicated that they would bike or walk, and 9% said they would find a ride or carpool.



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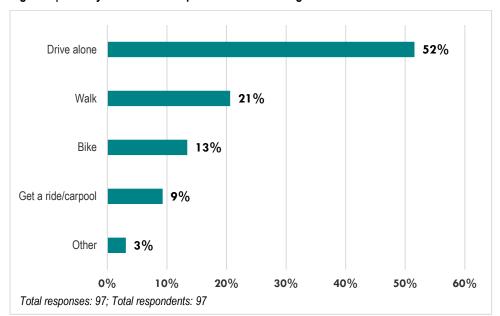


Figure 9 | Primary Modes of Transportation Used among Non-Transit Users

Alternative Modes

Survey respondents who regularly use transit were asked to evaluate their transportation options if their primary bus route did not exist. Respondents could select up to three alternative transportation options. Walking scored highest (49%), followed by 17% of respondents that indicated they would shift to another existing route. Biking represents an 11% share, and a combined 29% of respondents would drive alone or carpool. Nine percent of respondents would not make the trip at all, if their preferred route did not operate.

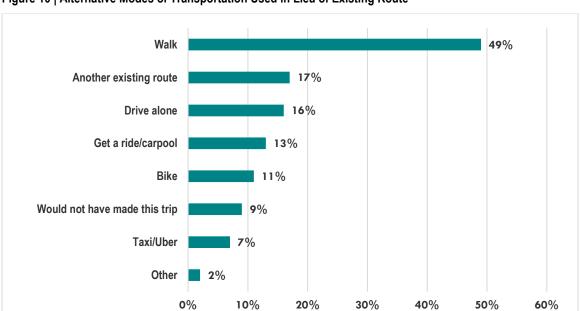


Figure 10 | Alternative Modes of Transportation Used in Lieu of Existing Route



Total responses: 1,109

TRIP INFORMATION

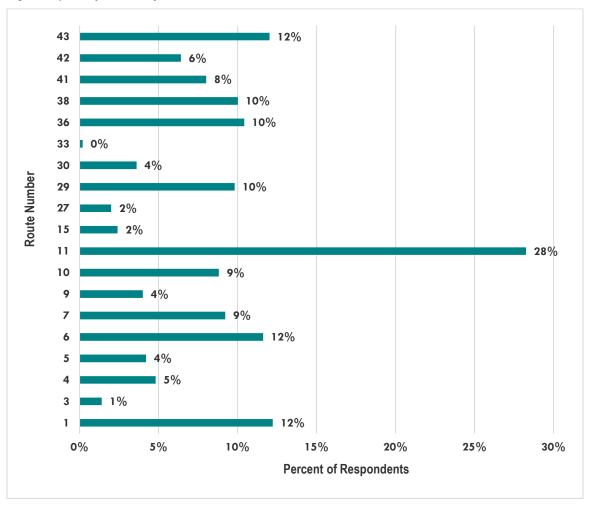
Survey respondents were asked to identify the bus route used on their most recent one-way trip with CS. Respondents were then asked to identify the origin location and ending destination on the same trip. The majority of riders use local bus service to travel between their home and school: 80% of trips originated at home or school and 74% of trips conclude at home or school.

Routes Utilized

According to survey respondents, the most utilized CS route is Route 11, which travels from downtown Lawrence to the Pine Ridge Plaza shopping center. Figure 11 displays the routes used by respondents to complete their current one-way bus trip (on-board survey) or most recent one-way bus trip (online survey). Routes 1, 6, 11, 29, 36, 38, and 43 each represent at least 10% of trips made using CS.

It's important to note that trips on university-focused routes are generally short, which leaves little time to complete a survey. Additionally, routes with high ridership create a more difficult environment for survey administration as it is difficult for the surveyors to move through crowded buses to distribute, collect, or administer surveys.

Figure 11 | Survey Results by Route





Trip Purpose

Survey respondents were asked to indicate a general trip origin and destination for their most recent trip using CS. The mix of trip origin and destination responses (between home, school, and work) indicate that surveys were completed during both the morning and evening periods. Nearly half of survey respondents started their trip from home, 34% began trips from school, and 10% started their trip at work (Figure 12).

Ending destinations were nearly equal between home (37%) and school (37%); work represented the final destination for 13% of respondents (Figure 12). These responses indicate that most riders are using local bus services for commuting between home and work or school.

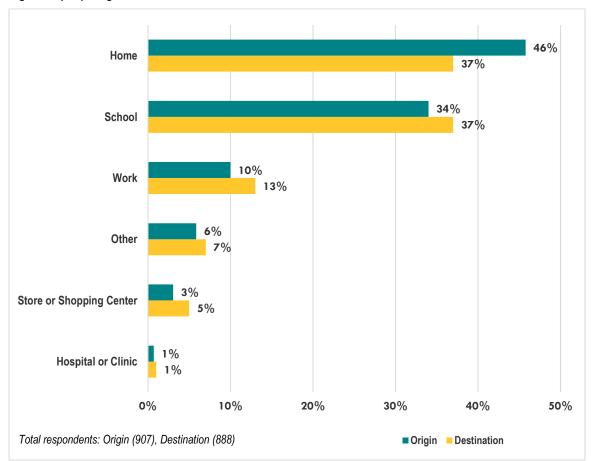


Figure 12 | Trip Origin and Destination Locations

Fare Medium

Reflecting CS's high percentage of student riders, nearly 80% of survey respondents used a KU card as fare payment on their most recent bus trip (Figure 13). Cash is the second-most popular fare payment method, followed by a monthly pass, 10-ride punch card, and day pass.



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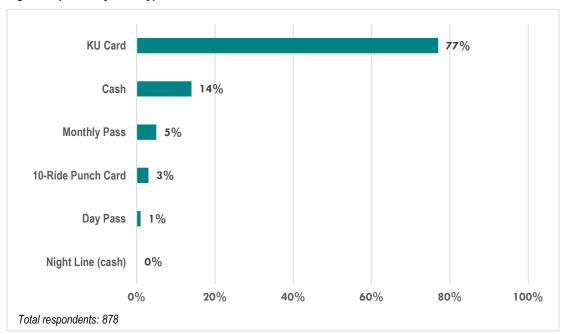


Figure 13 | Fare Payment Type

Fare Acquisition Location

Of respondents that purchased a bus pass for taking transit, 50% bought the pass at a Dillons grocery store (Figure 14). Thirty-one percent of pass users indicated that they obtained it from a different source, with KU being the most common response. Ten-percent purchased a pass at a Hy-Vee supermarket, 4% at City Hall, and 4% at The Merc Co-op.

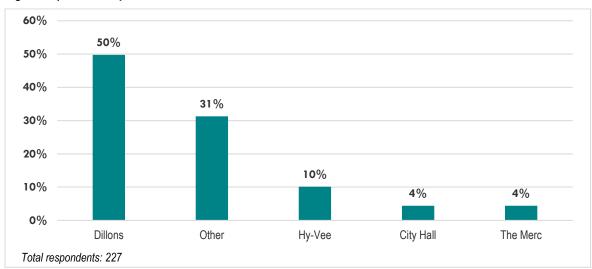


Figure 14 | Where Respondents Purchased Pass Products

CUSTOMER PERCEPTION

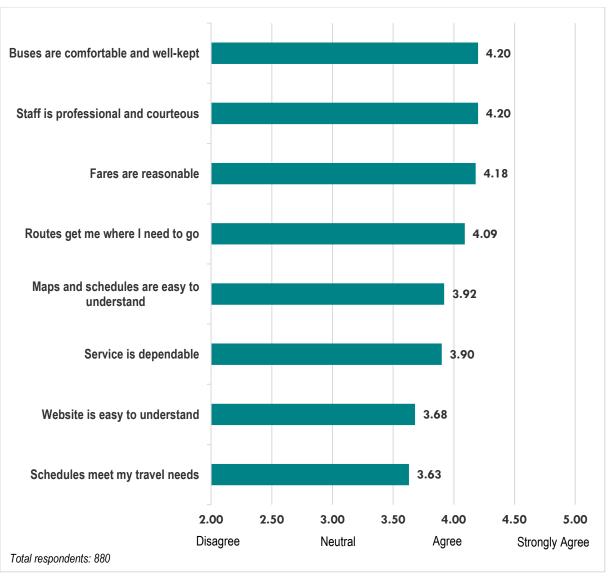
Survey respondents were asked a series of questions regarding their perception of CS service features (Figure 15). The results indicate that on average, current riders are highly satisfied with



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CS's current service conditions. Most critically, respondents rated service dependability an average of 3.90 out of five points, with five representing "strongly agree" and one representing "strongly disagree." Respondents agree on average that transit fares are reasonable (4.18 average), staff is professional and courteous (4.20), buses are comfortable and well-kept (4.20), and that routes get riders where the need to go (4.09). Respondents are less satisfied with the systems' user interface, but still agree to a lesser extent that maps and schedules are easy to understand (3.92), schedules meet their travel needs (3.63), and that the website is easy to understand (3.68).

Figure 15 | Respondent Perception of Service Features





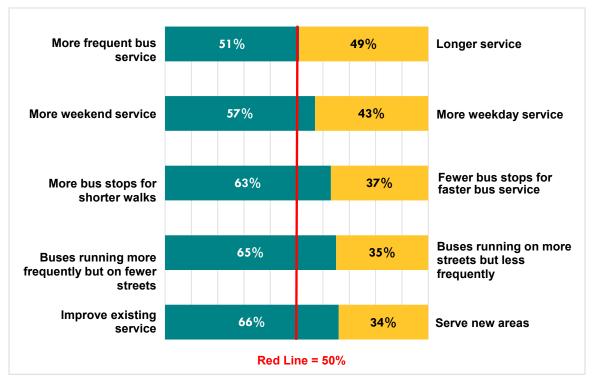
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CUSTOMER PREFERENCES

Survey respondents were asked to select their preference between two future theoretical service improvements. Preference questions focused on service frequency, span of service, preferred destinations, and coverage patterns.

Respondents are interested in increasing access by adding more bus stops, and are evenly split between increasing the frequency of bus service and extending the system's service hours. Thirty-four percent of respondents expressed interest in expanding to serve new areas, while 66% are in favor of improving the system's existing services.

Figure 16 | Summary of Customer Preferences





Frequency vs. Service Span

Respondents are evenly split between preferring longer service hours compared to increased frequency (Figure 17). A preference for longer service hours was reflected in the comments submitted along with the survey. Additional evening service, as well as service on Sunday, is one of the most requested service improvements by respondents in Lawrence.

60%
50%
49%
51%
50%
20%
Longer service hours

More frequent bus service

Figure 17 | Respondent Preference for Frequency vs. Service Span

Weekday vs. Weekend Service

Respondents prefer increased weekend service over additional weekday service by a 14-point margin (Figure 18). Nearly 60 respondents submitted written comments in support of Sunday service. Many of these respondents also simultaneously requested additional weekday service, suggesting that there is strong support for increased service span and frequency overall.

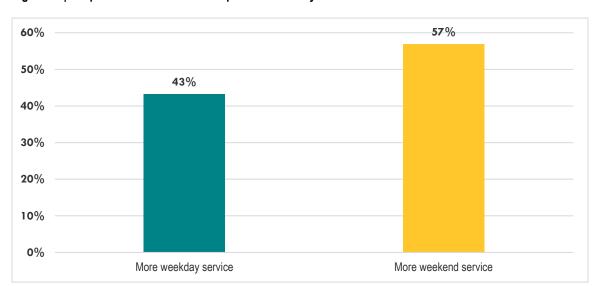


Figure 18 | Respondent Preference for Expanded Weekday vs. Weekend Service



Improved Existing Service vs. New Service Areas

Respondents prefer improving existing service over expanding the service area by a wide margin (Figure 19). Though the online survey was open to the entire Lawrence community, a large percentage of respondents were current transit users. Therefore, it is possible that support for expanding service areas is greater among potential riders in the broader Lawrence region.

70% 66% 60% **50**% 40% 34% 30% 20% 10% 0% Improve existing service Serve new areas

Figure 19 | Respondent Preference for Improved Existing Service vs. Serving New Areas

Fewer Bus Stops vs. More Bus Stops

Respondents prefer to add more bus stops along routes to reduce walk times to bus stops (Figure 20). Several comments expressed frustration towards bus drivers that are not willing to stop at four-way intersections to allow riders to board.

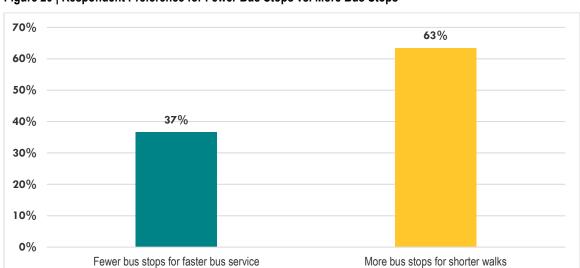


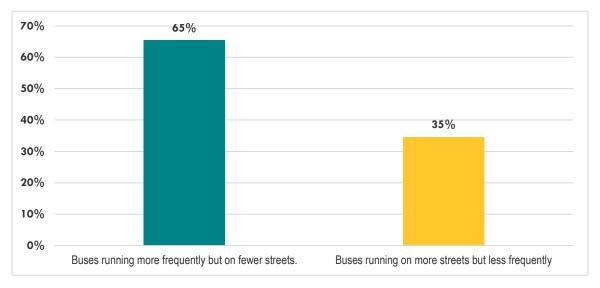
Figure 20 | Respondent Preference for Fewer Bus Stops vs. More Bus Stops



Frequent Bus Operations vs. Less Frequent Bus Operations

Respondents value more frequent bus service on select streets over less frequent bus operations on a broader street network (Figure 21). Increased frequency to 15 or 30 minutes-especially during the morning and evening peak periods-is a strong theme within respondents' comments.

Figure 21 | Respondent Preference for Frequent Bus Operations vs. Less Frequent Bus Operations

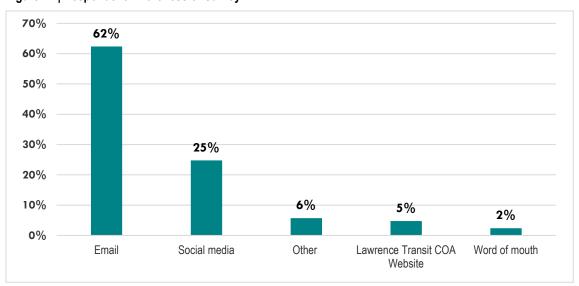


SURVEY OUTREACH AND WRITTEN COMMENTS

Survey Awareness

Online survey respondents were primarily made aware of the survey through email and social media networks. A significantly smaller percentage of respondents learned of the survey through the Lawrence Transit COA website (lawrencetransitstudy.com), other means (neighborhood associations), and word of mouth. This question was not included in the on-board survey.

Figure 22 | Respondent Awareness of Survey





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Expanded Service

Survey respondents who indicated that they do not use transit were given the opportunity to indicate where CS should expand its current service so that transit would be more useful. Survey respondents entered 58 suggestions for expanding current transit coverage. The three most requested locations for expanding local bus service were:

- Bob Billings Parkway and George Williams Way (7)
- Harvard Road (4)
- 6th Street (4)

This question was not included in the on-board survey.

Additional Comments

The survey included an open-ended written comment form. Out of the 1,137 completed surveys, 286 respondents (25%) included a written comment. While many riders discussed one specific topic, a number of the responses included comments and suggestions on a variety of topics. For this analysis, each discussed topic was assigned to broader categories to help identify recurring themes (Figure 23).

Adding Sunday service and increasing service spans were the most common comments. Within comments addressing service spans, increasing weeknight service was the most popular request. Increased service frequency was the third-most frequent. Increased frequency was requested on the following routes: Route 5, Route 6, Route 7, Route 9, Route 10, Route 11, Route 29, Route 36, and Route 38.

The majority of comments classified as information quality were complaints regarding lack of updates when route alignments are altered or re-routed, and the clarity and the functionality of CS's website. Several users also requested the ability to receive automatic texts or email updates when service or scheduling complications arise.

Service quality comments were split evenly between positive (9%) and negative (8%). Several negative service comments relate to buses routinely arriving late, or bus drivers not stopping at designated bus stops.

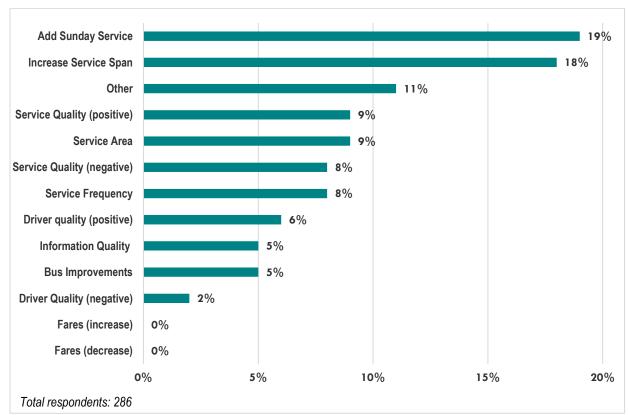
Based on the comments received, fares are not a major concern; only two comments addressed fare increases or fare deductions.

Comments classified as "Other" address a broad range of pertinent responses, including improving bus stop infrastructure, adjusting route timing, and raising driver wages. Additionally, several comments expressed displeasure with the proposed location for the multimodal transportation hub on KU's campus. However, this category also includes numerous comments that are irrelevant to the current COA.



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Figure 23 | Summary of Written Comments





Appendix B-1

Figure 24 | On-Board Survey Instrument - English

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1.	How often do you ride the b		Vheels)?	9. Wha	at is your age? 3 or under	□ 14-17 □ 36-64		☐ 18-2 ☐ 65 0				
2.	Including this bus, which routes will you use to complete this <u>one</u> way trip? 1st Route: 2nd Route: 3rd Route:			☐ Student ☐ Retired ☐ Other								
3.	Where did you begin this on Home Work School Please provide an address or de	ne-way trip? Store or Shopping Cen Hospital or Clinic Other escription of where this place is lo	nter	Le \$! 12. Which Lawn 	It is your approxities than \$10,000 50,000-\$74,999 ch of the following rence and/or at it do not own a car	\$10,00 \$75,00 ng describe (U? (Select	0-\$29,999 0 or more the reaso t all that a	□ \$30	,000-\$4	9,999		
4.	Where is your final destinat Home Work School	Nork Hospital or Clinic										
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5.	How did you pay for your far Cash Day Pass 10-Ride Punch Card	re today? Regular 🗆 Reduced 🗀 T-Lift	1 1	□ 18 □ 0 13. Bas e	am doing my part	for the envi	g the buse	s in Law llowing s	rence a stateme	nd/or at		
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LAWRENCE TRANSIT COA | SURVEY ANALYSIS Lawrence-Douglas County MPO

Dloaco provido ar	ny additional comments you have below.
rtease provide an	iy additional Comments you have below.
	Thank you for completing the Transit Rider Survey! Your input will help us continue to improve the service. Your responses will be kept strictly confidential.
	Tour responses with the kept strictly confidential.



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Figure 25 | On-Board Survey Instrument - Spanish

		NCUESTA DE PAS Por favor ayude a la Ci mejorar el servicio de tr Si usted ya ha co previo a este	iudad de La ansporte pu ompletado	wren úblico la m	ce y a l o reller nisma	a Universidad d nando la siguien	e Kansas a te encuesta a viaje		Sequi	ence Nun	nber:
1.	¿Con qué frecuencia utiliza el aut Casi cada día Varias veces por semana	obús (Lawrence Transit o KU o Ccasionalmente Esta es mi primera vez		9.	-	o menos	? □ 14-17 □ 36-64		☐ 18- ☐ 65 0		
2.	☐ Algunas veces al mes Incluyendo este autobús, ¿qué rutas va a utilizar para completar su viaje? 1a Ruta: 2a Ruta: 3a Ruta:			☐ Joi	es situación de rnada completa tudiante	☐ Desempleo ☐ Otro					
3.	¿Dónde comenzó su viaje? Casa Trabajo Universidad o Escuela Por facilite una dirección o de	☐ Centro comercial/tiend☐ Hospital o Clínica☐ Otro	da		☐ Me ☐ \$5 ;Cuále Lawre	es el ingreso fa enos de \$10,000 0,000-\$74,999 es son las razones nce y/o KU? (Selo dispongo de cod	\$10,000 \$75,000 \$por las que eccione tod)-\$29,999) o más utiliza el	□ \$30),000-\$49, e público e	
4.	¿Dónde se encuentra el destir Casa Trabajo Universidad o Escuela Por favor facilite una dirección o de	☐ Centro comercial/tiend☐ Hospital o Clínica☐ Otro☐	da		☐ No ☐ Pre ☐ No ☐ Too	coche esta temp p puedo conducir efiero pasar el tie p hay donde estac mar el autobús es antenimiento del más sostenible a	por razones mpo en act cionar/estac s más econ coche	s legales ividades cionar es ómico qu	o médica distintas caro	a conduc	
5.	¿Qué modo de pago utilizó par ☐ Efectivo	gular □ Reducida □ T-Liff gular □ Reducida gular □ Reducida □ T-Liff	t t	13.	En bas	ro se a su experienci nce y/o KU, indiqu ntes afirmaciones	a como pasa ie su nivel d	ajero del t	•		
6.	Si usted compró una tarjeta m Ayuntamiento	☐ Dillons	5?	serv	vicio	onfiar en el ne llevan donde					
	☐ The Merc ☐ Otro	☐ Hy-Vee			esito	ie lievaii uoliue					
7.	Si esta ruta no existiera, ¿cóm	o hubiera realizado este vi	aje?			s cubren mis es de viaje					
	☐ Otra ruta de autobús	☐ Caminando ☐ En bici		-		son razonables					
	☐ Manejar solo☐ Alguien me llevaría en coche				autobu en man	ses son cómodos tenidos					
	☐ Taxi/Uber	Otro		-		es professional					
8.	¿Cuál es tu género?	□ Mujor				y horarios son ntender					
	☐ Hombre	☐ Mujer		\vdash		ácil de navegar					
14.	La siguiente pregunta es en re		or favor ma	arque	_						
		Más frecuencia	◀ □0			Más cobertura ho					
		Más servicios entre semana	◀ □0		_	Más servicios en			d!		
	Más paradas de autobús para ano		◀ □0			Menos paradas do				nas rapido	os
		cambio de menos cobertura a de los servicios existentes	◀ □0			Más cobertura a c Servir zonas sin ti			uencia		
	•		◀ □0								
	Si usted desea a	ñadir algún detalle en re	lación a su	ıs re	spues	tas, por favor u	ıtilice el e:	spacio e	n el dor	S0.	



LAWRENCE TRANSIT COA | SURVEY ANALYSIS Lawrence-Douglas County MPO

			 	 	
Muchas gra	acias por comp			e Público!	
			nejorar el servio ente confidencia		

