



King County
METRO

King County
Metro Transit

**2014 Rider Survey
Final Report
Summary**

April 2015

Research Conducted for:
King County
Department of Transportation
Metro Transit Division

By:
Northwest Research Group, LLC

Prepared by:

King County Metro Transit Division
Strategy and Performance

Project / Program Manager
Lori Mimms

Senior Projects Manager
Chuck Sawyer

Northwest Research Group, LLC
Rebecca Elmore-Yalch, Principal / Managing Director
Nathan Wiggin, Project Director

For comments or questions contact:

Lori Mimms
206-477-5864
Lori.Mimms@kingcounty.gov



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EXECUTIVE SUMMARY

Project Overview

King County Metro Transit places high value on customer feedback. For more than 25 years, Metro has conducted an annual telephone survey of King County residents—both those who ride Metro buses and those who do not.

Objectives

- Provide a reliable measure of market share
- Track awareness and perceptions of Metro services among both Riders and Non-Riders
- Identify and track demographic characteristics, attitudes, and transit use among Riders and Non-Riders
- Provide insight about topics related to Metro's service, marketing, and communications strategies

The study is widely used by different Metro sections. It provides important information on current and past performance and helps provide direction for future strategies.

Methodology

The survey uses a robust dual-frame sample (calling both landline and cell-phone numbers) to reach a representative sample of all King County households. Riders are surveyed annually and Non-Riders biennially (typically in odd-numbered years). In 2014, 1,201 interviews were completed with three Rider segments:

Segment	Definition	Total Sample (n)
Regular Riders	Riders who took five or more one-way rides in the past 30 days	861
Infrequent Riders	Riders who took 1-4 one-way rides in the past 30 days	241
Lost Riders	People who used to ride but stopped as a result of the fall 2014 service change	99

The sample was stratified using the boundaries of Metro's former planning areas. A minimum number of interviews with Regular Riders was set for each geographic area (400 in Seattle / North King County and 200 each in South and East King County). Actual interview totals for each area are shown at right.



Key Findings

MARKET SHARE

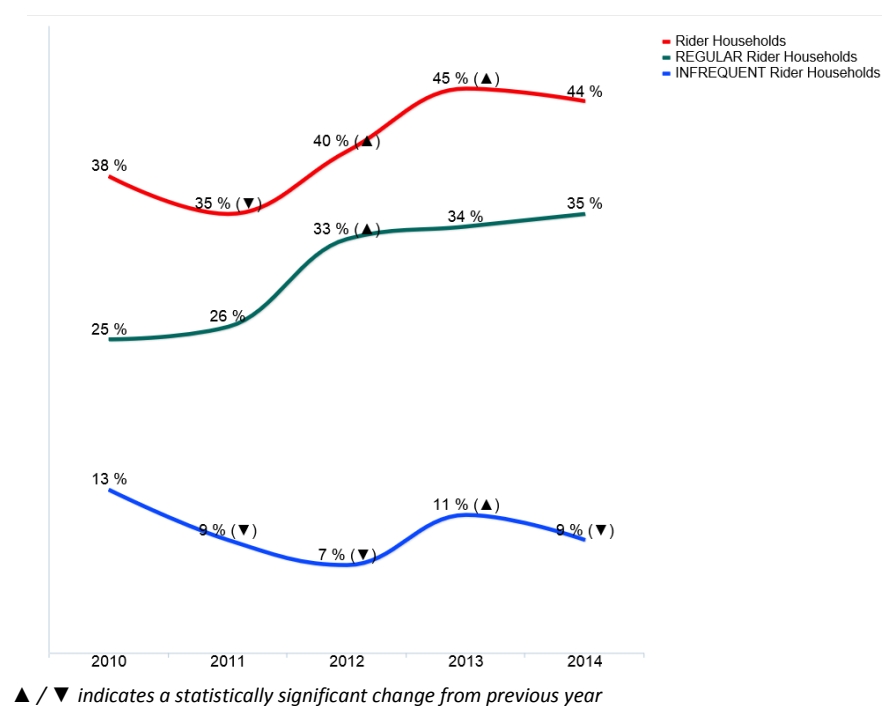
Metro represents an important mode of transportation for a significant percentage of King County's population.

Metro gained significant market share in 2012 and again in 2013. The share of households with Regular Riders increased slightly in 2014 while the share of households with Infrequent Riders decreased. The overall share of Rider households between 2013 and 2014 is unchanged.

Seattle / North King County represents Metro's largest market. While small geographically it has the highest number of households and the highest percentage of households with Riders. More than half of all Riders live in this area.

South and East King County are similar in size and market share. A greater percentage of Riders live in South versus East King County due to larger household sizes.

The share of Regular Rider households in South and East King County has risen significantly over the past several years.



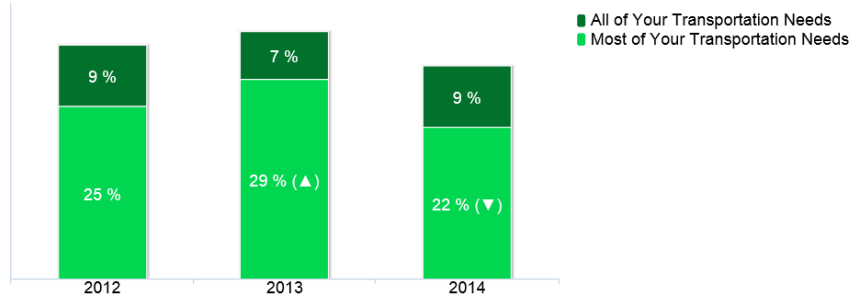
PERCENTAGE OF...	SEATTLE / N. KING	SOUTH KING	EAST KING
HOUSEHOLDS	39%	35%	35%
RIDER HOUSEHOLDS	62%	31%	31%
POPULATION WHO ARE RIDERS	55%	27%	27%
METRO RIDERS	52%	26%	22%

Transit Use

Most Metro Riders are “choice” Riders—they have other transportation choices.

Only one out of ten Riders lack access to a vehicle and rely on Metro for all or most of their travel.

The extent to which Riders rely on Metro for most of their transportation decreased significantly in 2014.



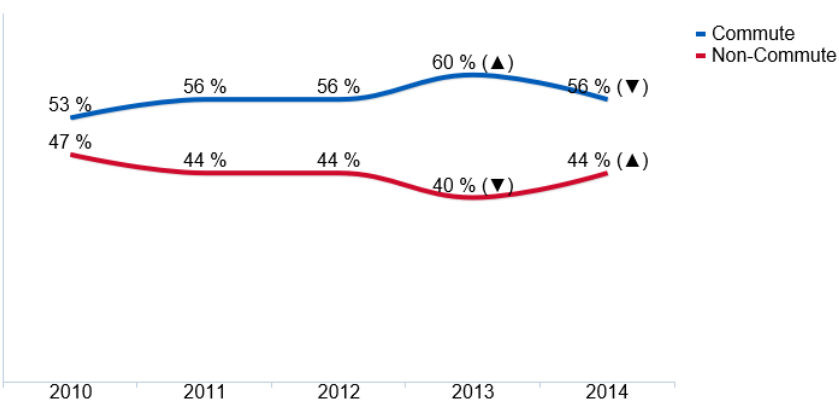
The majority of Riders have access to one or more vehicles. Even among those who rely on Metro for all or most of their transportation needs, most have access to a vehicle for some travel.

	(a) All / Most of Your Transportation	(b) Some of Your Transportation Needs	(c) Very Little of Your Transportation Needs
1+ Vehicles	70% (b ▼, c ▼)	97% (a ▲)	96% (a ▲)
0 None	30% (b ▲, c ▲)	3% (a ▼)	4% (a ▼)

▲ / ▼ indicates a statistically significant between respondent groups

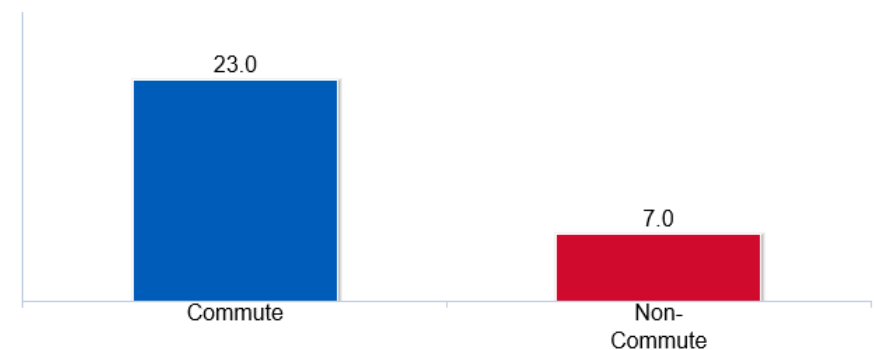
Metro serves those who primarily use transit to commute to work or school as well as those who use transit for non-work travel.

The majority of Riders have primarily used Metro to commute to work or school, but a significant percentage use Metro for non-commute travel.



Those using Metro primarily for commute trips represent Metro’s core market, averaging more than three times as many one-way trips per month than those who primarily use Metro for non-commute trips. So just over half of all Riders account for 80 percent of monthly trips.

Number of One-Way Rides in Past 30 Days



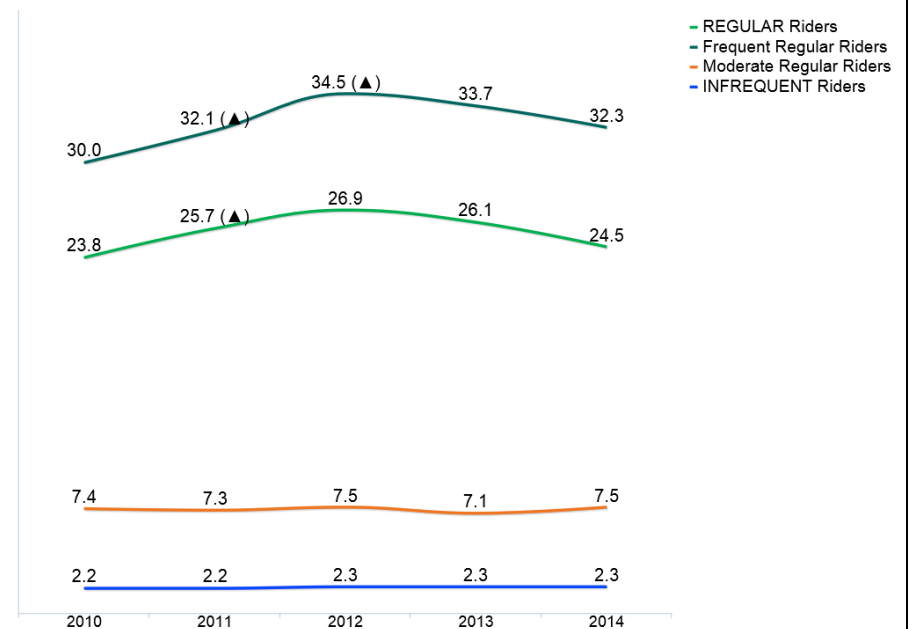
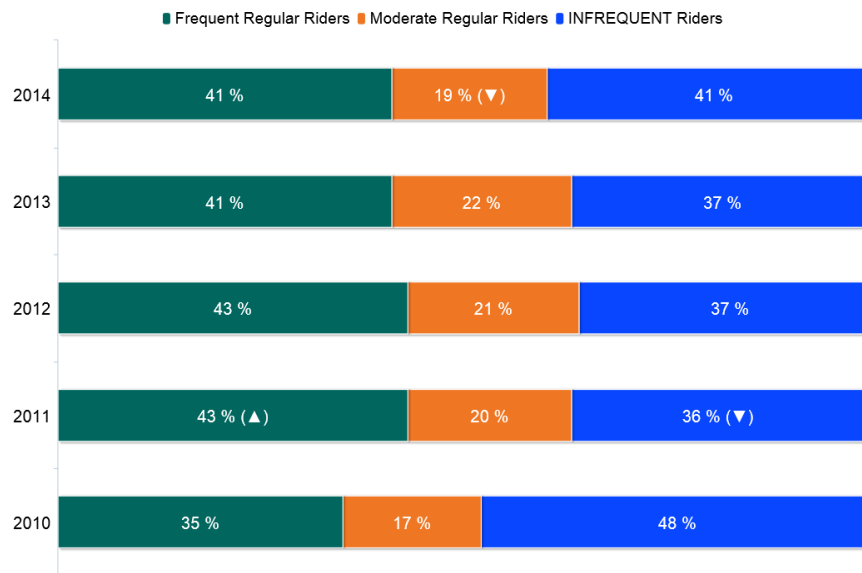
Transit Use

Metro serves three primary Rider segments, based on the number of monthly trips.
Frequent Regular Riders are Metro's core market

The distribution of these segments has remained relatively stable over the years. Two out of five Riders are Frequent Regular Riders—taking 11 or more one-way trips per month.

With the exception of Frequent Regular Riders, the average number of one-way trips taken has been relatively stable.

Trips taken by Frequent Regular Riders peaked in 2012 and have been decreasing since then. Frequent Regular Riders account for 85% of all trips.

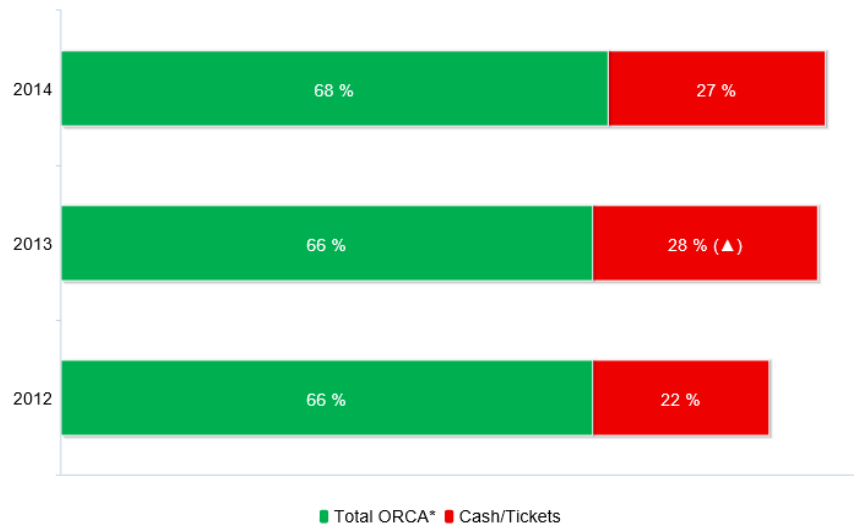


Fare Payment

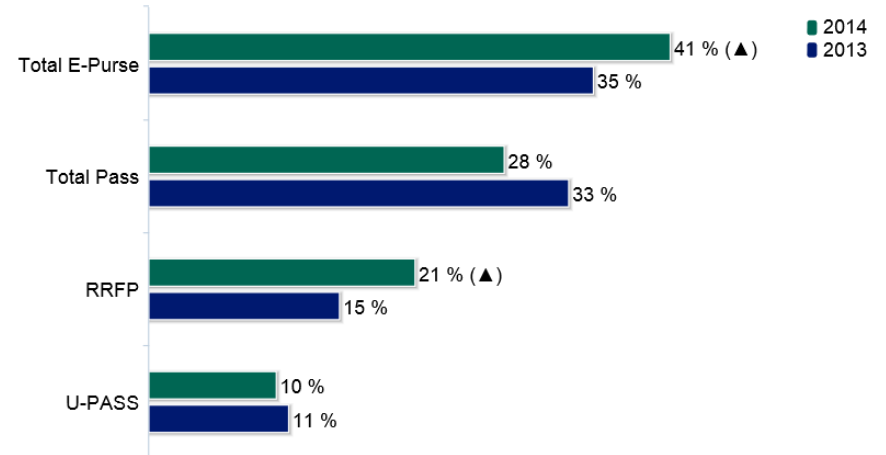
The split between ORCA and cash has remained relatively stable over the past two years.
Riders who use Reduced Regional Fare Permits increased significantly in 2014.

Riders are more than twice as likely to use an ORCA card than pay with cash—62% compared to 27%. ORCA use includes the 49% of Riders with an adult or youth fare on their ORCA cards as well as 13% with a Regional Reduced Fare Permit on their ORCA cards and 7% with a U-PASS.

The percentage of ORCA users with a pass on their cards decreased somewhat (significant at the 90% confidence level), with a corresponding increase in the percentage with an E-Purse. Consistent with the increase in older Riders surveyed in 2014, significantly more Riders currently have an RRFP on their ORCA Card.



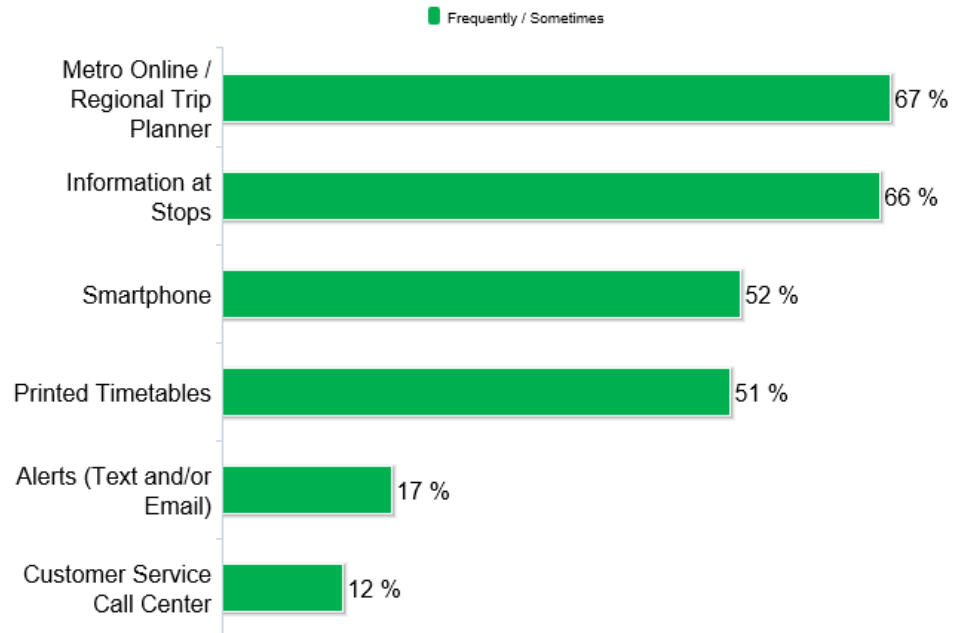
* Includes ORCA Cards, RRFP on ORCA Card, U-PASS



Information Sources

Riders rely heavily on online sources to get information about Metro, but printed timetables and information at stops are also widely used. A relatively small percentage of Riders call or use Metro Alerts.

Riders use multiple sources to get information about Metro. The most frequently used were online sources and information at stops.

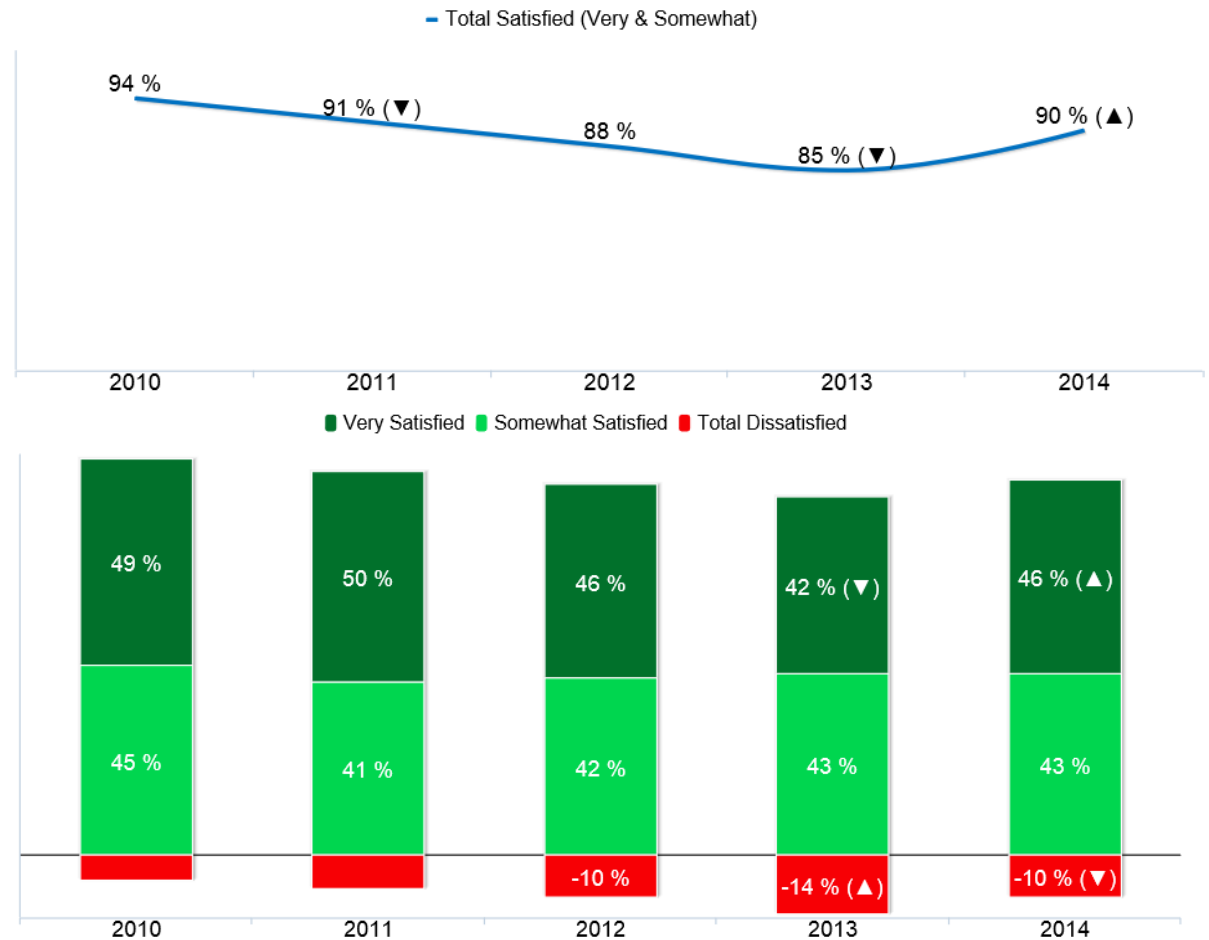


Overall Satisfaction with Metro

Despite significant service changes immediately before the survey data collection period, overall satisfaction with Metro increased significantly.

After several years of decreasing satisfaction, the overall percentage of Satisfied Riders (either "Very Satisfied" or "Somewhat Satisfied") increased.

- Notably, this increase was due to an increase in Riders who said they were "Very Satisfied."



In 2014, the sum of very (46%) and somewhat (43%) satisfied (46.1% + 43.4%) does not be the same as total (very and somewhat) satisfied due to rounding (89.5% rounds to 90%).

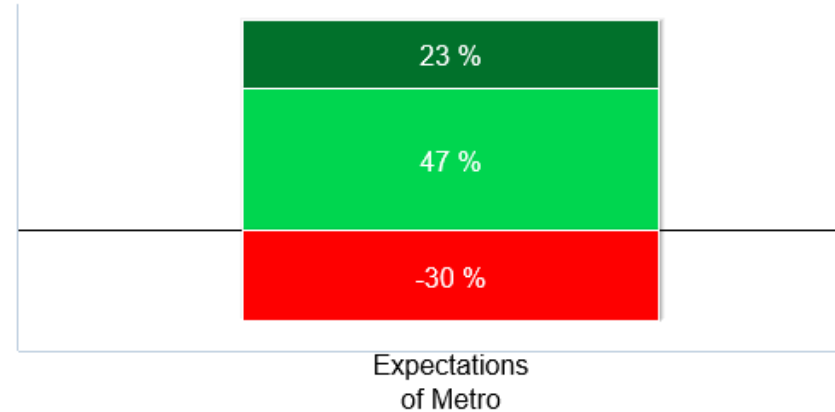
Riders' Expectations of and Advocacy for Metro

Riders have significantly more positive impressions of Metro.

The majority of Riders have high expectations for service quality and generally feel that Metro can deliver on these expectations.

- At the same time, three out of ten Riders have low or mixed impressions and expect to encounter problems when riding.

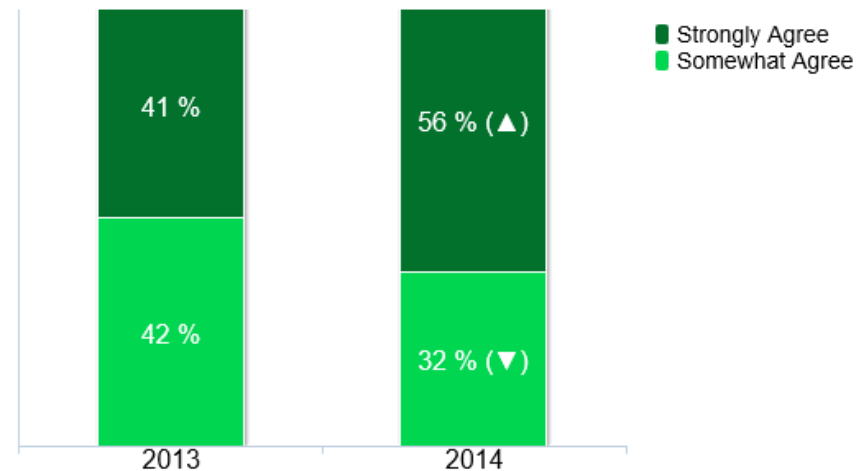
■ Expect High Quality and Confident Can Deliver
■ Expect High Quality and Generally Positive Can Deliver
■ Have Low or Mixed Impressions and Expect Problems



Riders are significantly more likely to strongly agree that they "like to be able to say they ride Metro."

This statement serves as a proxy for Riders' willingness to recommend riding and/or advocate for supporting Metro.

Agree/Disagree: I like to be able to say I ride Metro



Satisfaction with Service

Despite significant service changes immediately before the survey data collection period, overall satisfaction with Metro increased significantly.

Riders were asked their satisfaction with 36 specific elements of service. These next tables provide details of the percentage of Riders who are very satisfied with these elements of service and changes in the percentage of Very Satisfied Riders from 2013.

Satisfaction increased for some of the individual elements of service.

Notably, the percentage of Very Satisfied Riders increased significantly for several elements of Personal Safety.

- Riders continue to be less satisfied with Daytime Safety on Buses than at Stops.
- While the percentage of Very Satisfied Riders increased significantly for Onboard Safety after Dark, this continues to be one of the lowest rated elements of service (< 40% Very Satisfied).

	Very Satisfied	
	2013	2014
Fare Payment: Ease of paying fares when boarding	76%	81% (▲)
Information: Availability of information Metro Online	60%	71% (▲)
Personal Safety: At stops daytime	63%	70% (▲)
Personal Safety: Onboard daytime	51%	59% (▲)
Personal Safety: Onboard after dark	30%	37% (▲)

Satisfaction with Service

Satisfaction remained relatively stable for most elements of service.

Several elements of service related to Personal Safety and Comfort and Cleanliness at Stops continue to be some of the lowest-rated elements of service (< 40% Very Satisfied).

	Very Satisfied	
	2013	2014
Fare Payment: ORCA card	83%	87%
Fare Payment: Ease of loading a pass on ORCA card	68%	76%
Drivers: Operate vehicles safely	77%	74%
Fare Payment: Ease adding value to your E-Purse	71%	68%
Drivers: Helpfulness	64%	66%
Information: Overall ability to get	60%	63%
Personal Safety: In downtown transit tunnel	48%	51%
P&R Lots: Lighting	54%	48%
Comfort / Cleanliness Onboard: Cleanliness	46%	47%
P&R Lots: Personal safety	52%	46%
Information: Availability at stops	-	45%
Comfort / Cleanliness at Stops: Ease of loading and unloading	49%	45%
Comfort / Cleanliness at Stops: Cleanliness	38%	41%
LOS: Travel time	43%	41%
P&R Lots: Vehicle Security	40%	40%
Comfort / Cleanliness at Stops: Shelters	33%	35%
Comfort / Cleanliness at Stops: Lighting	33%	33%
Personal Safety: At stops after dark	31%	28%

Satisfaction with information at bus stops was added in 2014, so no comparable ratings are available for 2013

Satisfaction with Service

Satisfaction decreased for some elements of service. Most of these elements of service are also some of the lowest rated elements (<40% very satisfied).

- Notably, the percentage of Very Satisfied Riders decreased for four out of the five key elements of service related to the Level of Service (LOS) provided as well as both aspects of transferring.

The percentage of Very Satisfied Riders decreased for several aspects of Comfort and Cleanliness Onboard and At Stops.

- All are related to overcrowding.

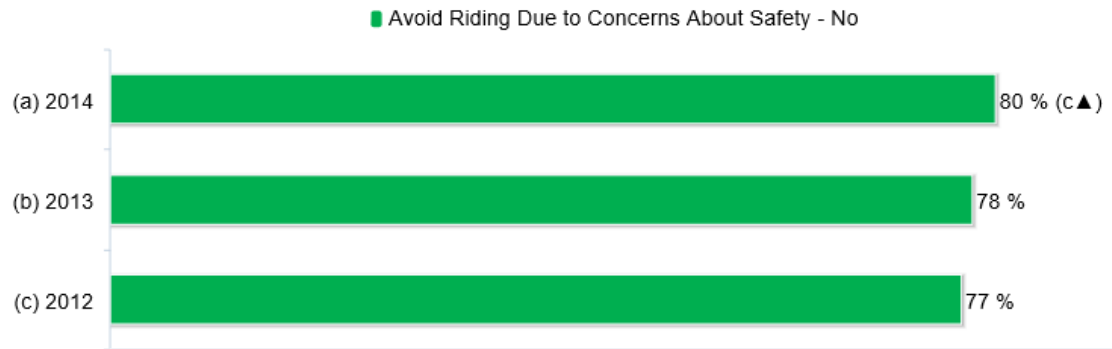
	Very Satisfied	
	2013	2014
Drivers: Handle problems on vehicles effectively	64%	55% (▼)
Fare Payment: Availability of locations to purchase a pass / add value to E-Purse	61%	54% (▼)
LOS: Distance home to stop	64%	52% (▼)
LOS: On-time performance	46%	41% (▼)
LOS: Availability of service	51%	40% (▼)
Comfort / Cleanliness Onboard: Availability of seating	47%	40% (▼)
LOS: Frequency of service	45%	36% (▼)
Comfort / Cleanliness Onboard: Ease of loading and unloading	48%	36% (▼)
Transferring: Number of transfers	44%	35% (▼)
P&R Lots: Parking availability	45%	34% (▼)
Comfort / Cleanliness at Stops: Seating	35%	29% (▼)
Transferring: Wait time	35%	26% (▼)
Comfort / Cleanliness Onboard: Overcrowding	29%	21% (▼)

Perceptions of Personal Safety

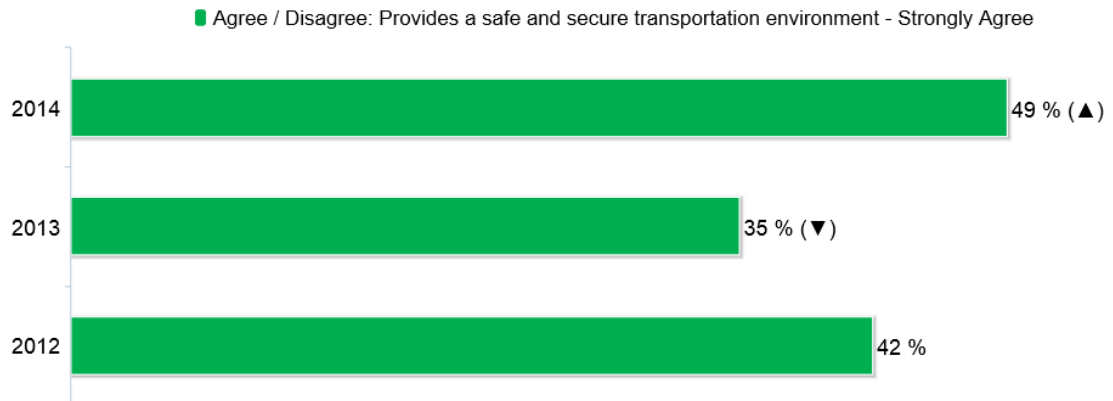
Consistent with increased satisfaction with Personal Safety, Riders perceptions of Metro's efforts to improve safety have improved.

The majority of Riders do not avoid riding because of concerns about safety.

The extent to which Riders avoid riding has decreased significantly from 2012, the first year this question was asked.



Nearly half of all Riders strongly agree that Metro provides a safe and secure transportation environment. This number is up significantly from 2013, and at its highest level of agreement since the question was first asked in 2012.



Perceptions of Personal Safety

One of three Riders strongly agree that Metro is proactive in improving safety and security, and the increase in the percentage who strongly agree is consistent with other increases in positive perceptions of Metro and its efforts to improve safety.



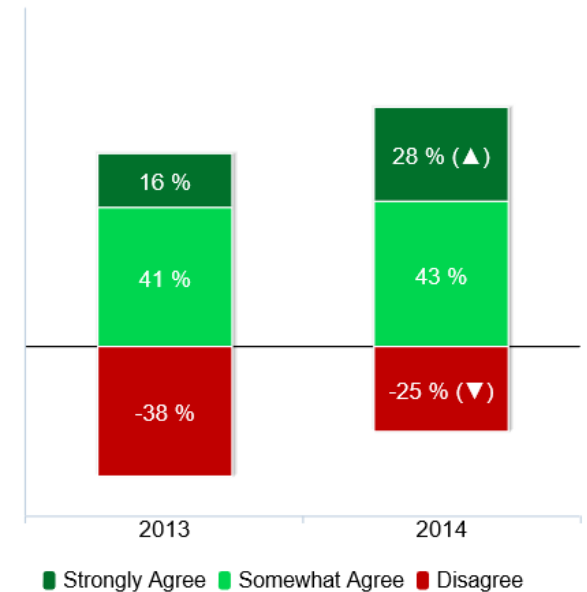
Riders are increasingly likely to strongly agree that it is safe to ride in downtown Seattle.

- Riders continue to express concerns about safety using public transportation in downtown Seattle when it is dark.

Agree/Disagree: Safe to use transit in DT Seattle daytime



Agree/Disagree: Safe to use transit in DT Seattle after dark



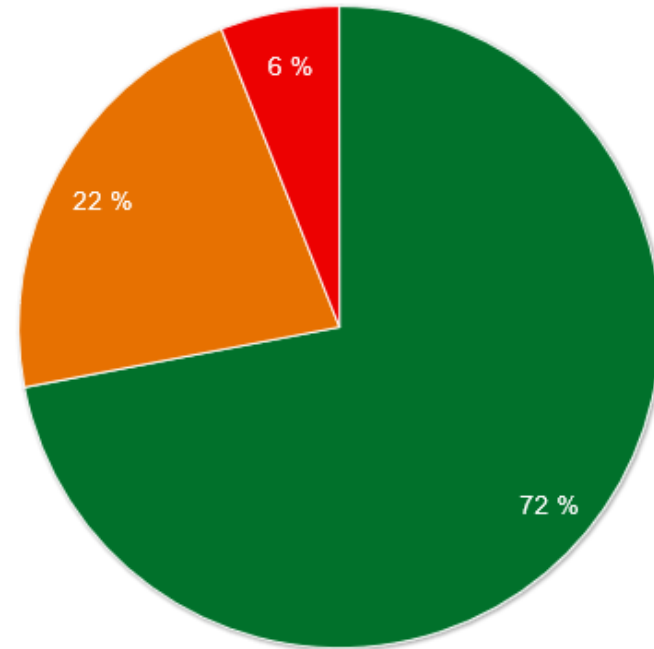
Impacts of September 2014 Service Change

The large majority of Riders were not impacted by the service change.

Nearly three out of four respondents indicated that they were not impacted by the service change (Current Riders: No Impact).

About 1 in 17 respondents said they stopped riding as a result of the service changes (Lost Riders).

■ Current Riders: No Impact ■ Current Riders: Impacted ■ Lost Riders

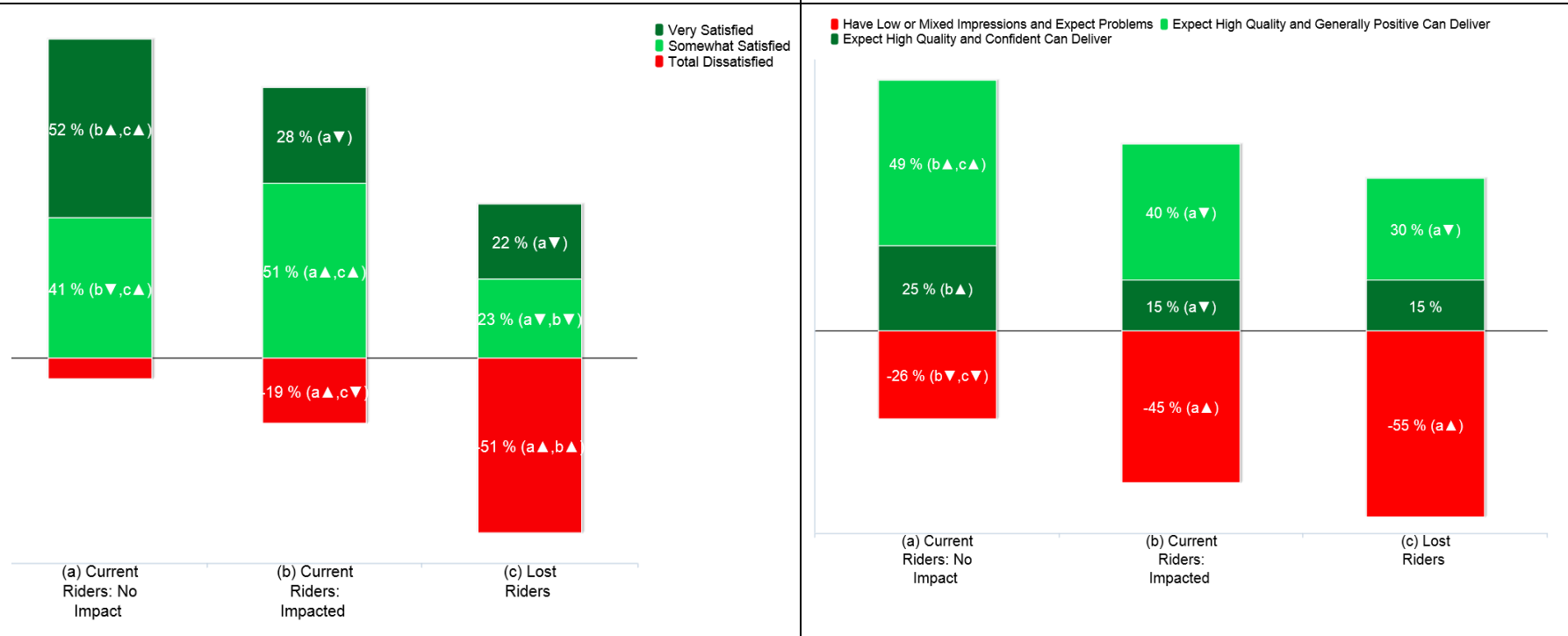


Impacts of September 2014 Service Change

The service change had a significant impact on Riders' overall satisfaction with Metro as well as their perceptions that Metro can deliver the level of service they expect.

The service change had a significant impact on Impacted Riders' overall satisfaction with Metro. Without the service change, it is possible the increase in overall satisfaction mentioned earlier could have been greater.

Current Riders impacted by the service change and Lost Riders also have significantly lower expectations that Metro can deliver quality service.



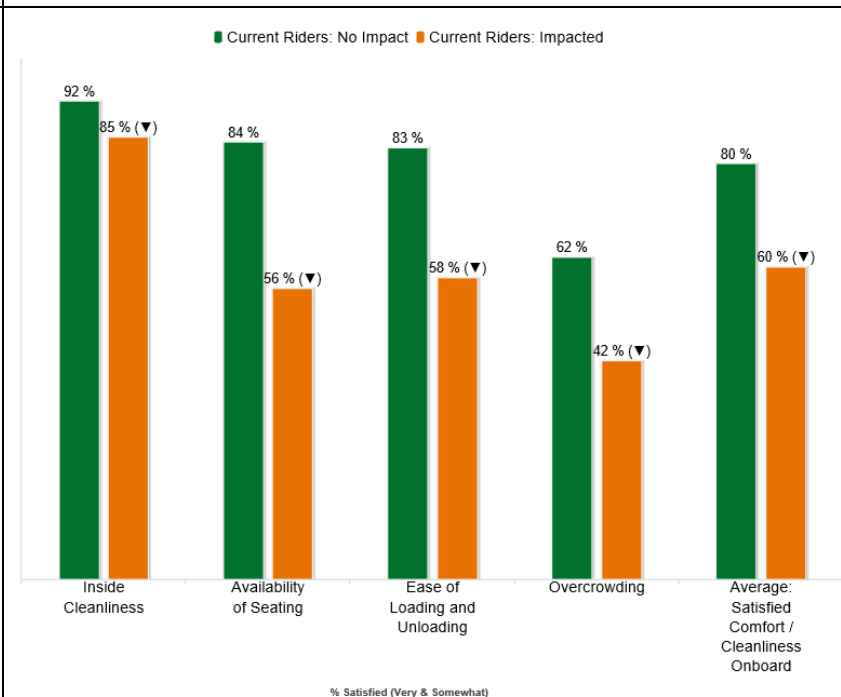
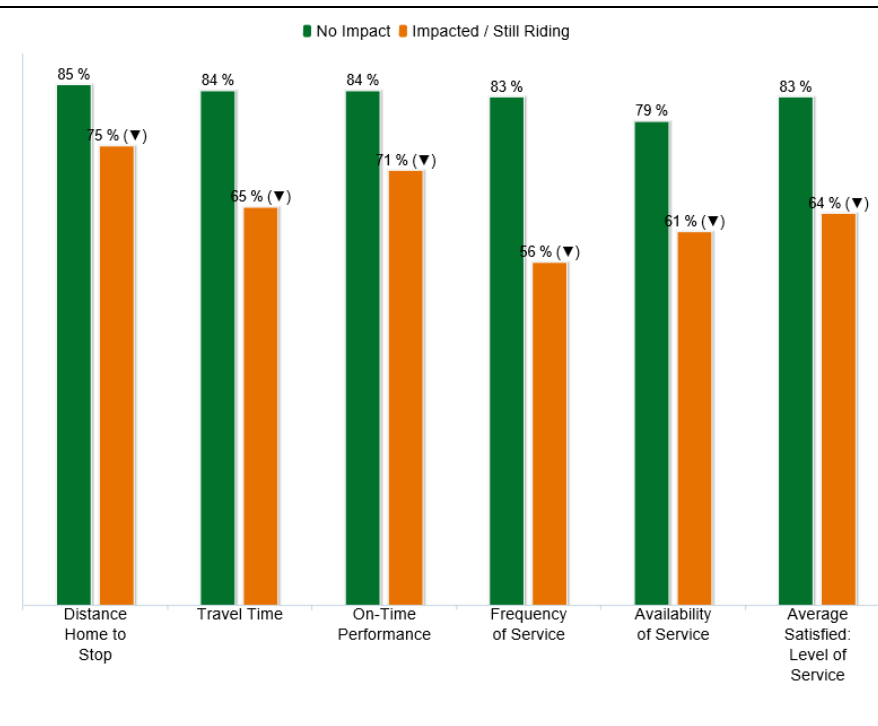
Impacts of September 2014 Service Change

Riders who were impacted by the service change were significantly less satisfied with the Level of Service provided. The impact was greatest on the percentage very satisfied with:

- Frequency of Service
- Travel Time

Riders impacted by the service change were also significantly less satisfied with Comfort Onboard. The impact was greatest on the percentage very satisfied with:

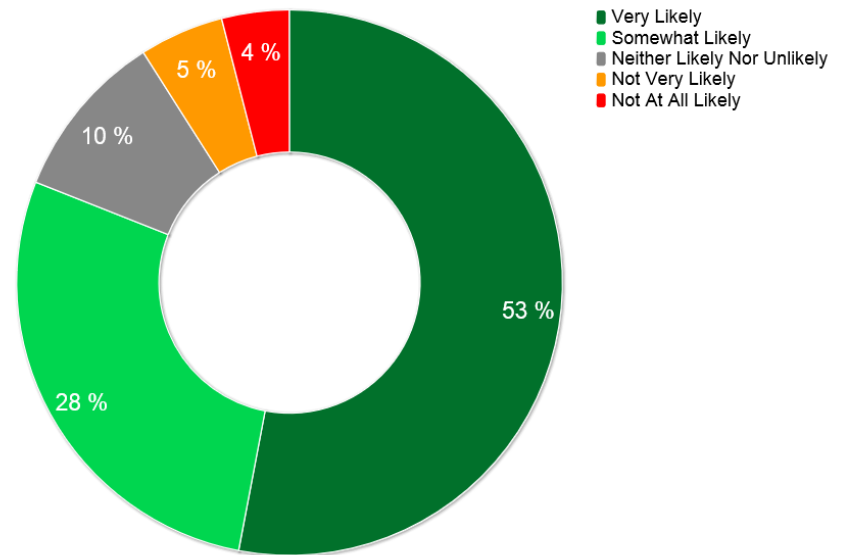
- Availability of Seating
- Ease of Loading and Unloading (due to crowding on the vehicles)



Impacts of September 2014 Service Change

The majority of those who stopped riding as a result of the service change say they would ride again if service is restored.

Despite the impact the service changes had on overall satisfaction and perceptions of Metro among Lost Riders, a large majority of Lost Riders suggest they would ride Metro again if service is restored.



Key Drivers Analysis

While Metro made significant strides in increased satisfaction, analysis of the survey results identifies improvements that will positively influence Rider satisfaction and perceptions that Metro delivers service that meets their expectations.

Key Drivers Analysis identifies the extent to which the overall service dimensions and the individual service elements influence Riders' satisfaction with—and expectations of—Metro. Satisfaction ratings are used to identify priorities for improvements and services to maintain.

Level of Service (LOS) continues to be the most important determinant of Riders' satisfaction with and expectations of Metro.

- With the exception of Distance from Home to Stop, all elements of service within the LOS dimension receive below-average satisfaction ratings.

Personal Safety is the second most important service dimension.

- While satisfaction has improved, Safety after Dark is still a concern.

Comfort and Cleanliness At Stops and Onboard are also important priorities for improvement.

- Comfort and Cleanliness at Stops is more important than while onboard.
- All elements of service within the Comfort and Cleanliness at Stops dimension receive below-average ratings.

While Transferring is less important, both elements are important and ratings are low.

	Importance Rank	% Very Satisfied	Strategy
Level of Service	1	41%	Improve
Travel Time	1	41%	Improve
Availability	2	40%	Improve
Frequency	3	36%	Improve
On-Time	4	41%	Improve
Distance to Stop	5	53%	Maintain
Personal Safety	2	50%	Monitor
Onboard: Daytime	1	59%	Maintain
Stops: Dark	2	28%	Improve
Onboard: Dark	3	37%	Improve
Stops: Daytime	4	70%	Maintain
Downtown Transit Tunnel	5	51%	Monitor
Comfort and Cleanliness at Stops	3	36%	Improve
Loading/Unloading	1	45%	Improve
Lighting	3	33%	Improve
Shelters	2	35%	Improve
Cleanliness	4	41%	Improve
Seating	5	29%	Improve
Comfort and Cleanliness Onboard	4	36%	Improve
Cleanliness	1	47%	Improve
Crowding	2	21%	Improve
Loading/Unloading	3	36%	Improve
Availability of Seating	4	40%	Strategically Target
Information Sources	5	66%	Maintain
Overall Ability to Get Information	1	63%	Maintain
At Stops	2	43%	Improve
Availability of Information Online	3	71%	Maintain
Metro Drivers	6	65%	Maintain
Effectively Handle Problems	1	55%	Monitor
Helpfulness with Information	2	66%	Maintain
Safe Vehicle Operation	3	74%	Maintain
Transferring	7	30%	Improve
Wait Time	1	27%	Improve
Number	2	35%	Improve

The summary table is ordered based on the importance of the Overall Service Dimension followed by the importance of the individual elements of service within that dimension.

STUDY BACKGROUND AND OBJECTIVES

King County's Department of Transportation—Transit Division (King County Metro) places high value on customer feedback and for more than 25 years has conducted an annual survey with King County residents who are transit Riders and Non-Riders. The primary objectives of this ongoing study are to:

- Provide a reliable measure of market share—that is, the percentage of households in King County with one or more riders
- Track customer awareness and perceptions of Metro services and programs
- Identify and track demographic, attitudinal, and transit use characteristics among riders and commuters
- Provide insights on current and relevant topics that are a current focus of Metro's service, marketing, and communications strategies

Riders are surveyed every year; Non-Riders are generally included every other (odd-numbered) year. This year's survey (2014) focuses primarily on Riders. In addition, the survey included some respondents who stopped riding due to the September service change.

METHODOLOGY

Sampling

The 2014 survey was based on a random telephone (landline and cell phone) sample of 5,348 King County residents aged 16 and older. A total of 1,201 of those contacted reported that they had ridden Metro in the 30 days prior to being surveyed and completed the entire survey.

Three primary rider segments were interviewed. The Lost Rider segment is new in 2014 and was included to provide insights into the impact of the September 2014 service changes.



Regular Riders

5 or More One-Way Rides in Past 30 Days
n = 861



Infrequent Riders

1–4 One-Way Rides in Past 30 Days
n = 241



Lost Riders

Rode Prior to 10/2014 and Stopped
Riding as a Result of Service Changes
n = 99

Regular Riders were further segmented based on their riding frequency.



Frequent Regular Riders

11+ One-Way Rides in Past 30 Days
n = 591



Moderate Regular Riders

5–10 One-Way Rides in Past 30 Days
n = 266

Four (4) Regular Riders did not provide an absolute number of one-way rides taken in the past 30 days. Therefore they are not included in the Frequent or Moderate Regular Rider classifications, and the sum of these two segments (n = 857) is less than total Regular Riders (n = 861).

To address the growing prevalence of cell-phone-only households and those who primarily use cell phones in King County, a dual-frame sample methodology was used. Nearly half (46%) of all King County households are cell-phone-only households.¹

In 2014, nearly two out of five respondents were reached through the cell phone sample. More than half of all respondents reported that they either only or primarily use a cell phone.

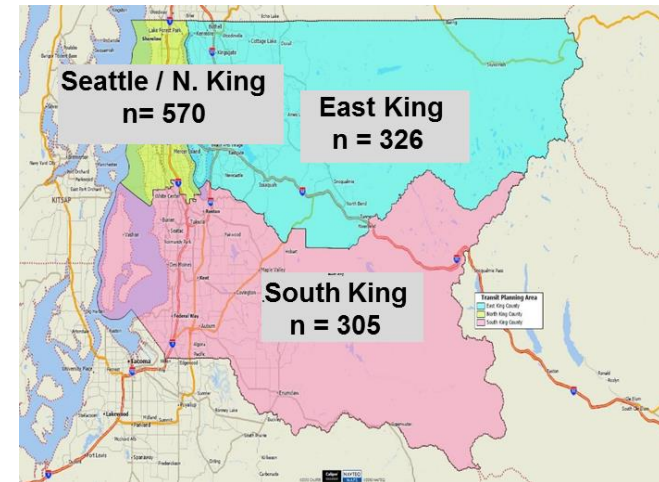
Because cell phones are considered personal devices, the individual reached on the cell phone was surveyed. For the landline sample, if the household was identified as a Regular Rider household, an attempt was made to interview the Regular Rider. If the household was identified as an Infrequent Rider household, an attempt was made to interview the Infrequent Rider.

YEAR		2010	2011	2012	2013	2014
CELL PHONE SAMPLE	#	254	795	536	976	457
	%	22%	30%	44%	40%	38%
LANDLINE SAMPLE	#	886	1,762	682	1,438	744
	%	78%	79%	56%	60%	62%
TOTAL	#	1,140	2,521	1,218	2,414	1,201

¹ Source: Wireless Substitution: State-level Estimates from the National Health Interview Survey, 2012, Number 70, December 18, 2013.

To provide the ability to do reliable analysis across the region served by Metro, the sample was stratified using the boundaries of Metro's former planning areas. A minimum number of interviews with Regular Riders was set for each geographic area.

	COUNTYWIDE	SEATTLE/ NORTH	SOUTH KING	EAST KING
REGULAR RIDERS MINIMUM N	800	400	200	200
REGULAR RIDERS ACHIEVED	861	417	222	222
INFREQUENT RIDERS	241	123	52	67
LOST RIDERS	99	30	32	37
TOTAL	1,201	570	305	326



Finally, to ensure representation of King County's diverse population, supplemental sampling was undertaken to ensure representation of low-income households and Hispanic and Asian riders roughly in proportion to their incidence in the general population.

TARGET DEMO	% IN POPULATION	NUMBER ACHIEVED	% OF SAMPLE
LOW-INCOME HOUSEHOLDS (<\$35,000)	24%	268	24%
HISPANICS	7%	71	6%
ASIAN	13%	137	11%

Data were weighted based on this complex sampling plan. Full documentation of the weighting procedures is provided to Metro separately.

Using a 95 percent confidence level, the margin of error of the entire sample is no greater than plus or minus 2.8 percentage points. This means that if the study were duplicated in the same time frame with a different 1,200 respondents, sampled in the same fashion, 95 times out of 100, the same result would occur, within the stated range. The adjacent table provides the margin of error for key subgroups in the study.

	N	MARGIN OF ERROR 95% CONFIDENCE LEVEL
TOTAL CONTACTS*	5,348	±1.3%
TOTAL	1,201	±2.8%
SEATTLE / NORTH KING COUNTY	570	±4.1%
SOUTH / EAST KING COUNTY	305–326	±5.5%
REGULAR RIDERS	861	±3.3%
INFREQUENT RIDERS	241	±6.3%
LOST RIDERS	99	±9.8%

** The all contacts data file is used to compute market share and includes all Riders and Non-Riders contacted.*

Survey Instrument

The questionnaire included many of the same questions as in previous years as well as new questions to address special topics. The topics covered in the survey for each Rider segment are shown in the adjacent table.

The interviews averaged 23 minutes. The survey was significantly longer for Regular and Infrequent Riders (25 and 22 minutes, respectively) than for Lost Riders (13 minutes).

All Contacts		
• Household Ridership	• Individual Ridership	• Impact of Service Change
Current Riders		
• Frequency	• Trip Purpose(s)	• Length of Time Riding
• Transit Dependence	• Transferring	• Travel Behavior
• Personal Travel	• Fare Payment	• Personal Safety
• Information Sources	• Commute Status and Behavior	
• Management of Service Change	• Satisfaction with Service Elements	
Current and Lost Riders		
• Overall Satisfaction	• Perceptions of Metro	• Demographics

The survey instrument was pretested over several days. The initial pretest focused on questionnaire wording and respondent understanding. Subsequent pretesting was used to test study assumptions including survey length and incidence. Data collection began on November 8, 2014, and continued through December 14, 2014. No interviewing was done the day before or after the Thanksgiving holiday (November 27).

Data collection was originally scheduled to start on 10/27/2014 but was delayed to begin after the election held on 11/04/2014. It was felt that inclusion of Proposition 1 (a transit-related measure) on the Seattle ballot could adversely impact response rates and introduce bias.

Bernett Research was used for telephone data collection; they also did the data collection for the 2013 Rider / Non-Rider Survey. A minimum of 10 percent of all interviews were monitored; NWRG project staff monitored (either live or through recordings) a minimum of 5 percent of the interviews.

Interviews were conducted in English and Spanish. The survey was translated into Spanish and administered by multilingual interviewers. Seventy-one (71) respondents self-identified as Hispanic; a total of 22 interviews (31%) chose to complete the survey in Spanish. This is significantly higher than 2013 when only 22 out of a total of 120 Hispanics (18%) completed the survey in Spanish.

FINDINGS—MARKET SHARE

This annual survey provides a reliable measure of market share—defined as the percentage of King County households with one or more Regular Rider (individuals taking at least five one-way rides monthly). This is done by asking all households contacted: (1) the number of individuals in their household 16 years of age and older, (2) the number of household members taking at least one one-way ride on a Metro bus or the South Lake Union Streetcar in the previous 30 days, and (3) the number taking five or more one-way rides in the previous 30 days.

Topic	What We Found			What It Means	
Household Market Share	Countywide, the share of Regular Rider households has remained stable for the past three years. <ul style="list-style-type: none">The share of households with Infrequent Riders (no Regular Riders) has fluctuated over the years.	2012	2013	2014	Metro’s ridership growth in recent years has come from population growth—that is, growth in the number of households in King County—attracting Riders from within these new households while retaining Riders from within existing households.
		REGULAR Rider Households			
		33%	34%	35%	
		INFREQUENT Rider Households			
		7%	11%▲	9%▼	
		NON-Rider Households			
		60%	55%▼	56%	
Significant increase (▲) or (▼) from previous year					
Seattle / N. King County	Geographically Seattle / North King County is relatively small but is the most densely populated area of the county (39% of all households). After decreasing significantly between 2012 and 2013, the share of Regular Rider households increased somewhat in 2014. This increase, however, is not statistically significant and should be monitored in further years.	2012	2013	2014	Seattle / North King County continues to represent King County’s core market. It is the most densely populated geographic area (39% of all households), and extensive, relatively high-frequency service has translated into very high market share.
		REGULAR Rider Households			
		53%	47%▼	49%	
		INFREQUENT Rider Households			
		11%	14%▲	13%	
		NON-Rider Households			
		36%	39%	38%	
Significant increase (▲) or (▼) from previous year					

Topic	What We Found			What It Means	
South King County	<p>Geographically larger than Seattle / North King County, South King County represents approximately one-third (35%) of all King County households.</p> <p>The share of Regular and Infrequent Rider households in South King County increased significantly in 2013.</p> <p>Both figures decreased in 2014, with the percentage of Infrequent Rider households decreasing significantly.</p>	2012	2013	2014	<p>The significant increase in household market share in this region between 2012 and 2013 may have reflected the growth in transit-oriented developments and increased access to more direct, higher frequency service. Current figures suggest that growth has stabilized and that additional service may be necessary to further increase ridership in this area.</p>
		REGULAR Rider Households			
		19%	28%▲	26%	
		INFREQUENT Rider Households			
		4%	7%▲	5%▼	
		NON-Rider Households			
		77%	65%▼	69%▲	
Significant increase (▲) or (▼) from previous year					
East King County	<p>East King County is also geographically larger than Seattle / North King County yet represents only 27% of all King County households.</p> <p>The share of households with Regular Riders has nearly doubled since 2010—from 15% to 27%.</p>	2012	2013	2014	<p>The most recent increase in the share of Regular Rider households is largely due to the decrease in Infrequent Rider households, suggesting that less frequent Riders in East King County are taking more trips, shifting them from Infrequent to Moderate Regular Riders.</p>
		REGULAR Rider Households			
		22%	23%	27%▲	
		INFREQUENT Rider Households			
		6%	11%	8%▼	
		NON-Rider Households			
		72%	66%▼	65%	
Significant increase (▲) or (▼) from previous year					
Share of Population	<p>Using the average number of individual Riders reported, it is possible to provide an estimate of the percent of the population 16 years of age and older who ride Metro.</p> <p>One out of four King County residents who are 16 years of age or older are Regular Riders, and an additional 14 percent are Infrequent Riders.</p>	% of Population 16+ Who Are . . .			<p>King County Metro provides a necessary service for a significant percentage of the population, notably in the geographically constrained and densely populated communities surrounding downtown Seattle. Even in the more suburban areas of the county, a large percentage of the population has direct experience with the system on a regular or semi-regular basis.</p>
		ALL Riders	REGULAR Riders	INFREQUENT Riders	
		All King County			
		38%	24%	14%	
		Seattle / North King County			
		55%	35%	19%	
		South King County			
		27%	17%	10%	
		East King County			
30%	17%	13%			

FINDINGS: RIDER DEMOGRAPHICS

Topic	What We Found			What It Means	
All Current Riders	Riders surveyed in 2014 are more likely to be women than men—the reverse of the general population.		King County Population*	Current Metro Riders	While response rates to the survey were high, there is a significant increase in the percentage of older riders reached. A greater number of older riders were reached through the cell phone sample which in the past reached a high number of younger residents. In addition, a greater percentage of Infrequent Riders were surveyed. Infrequent Riders are older. Future research can be used to determine if this (aging Riders) is a trend. With most Riders have access to a vehicle, it is clear that they have a choice in whether or not to use transit. Other factors such as access to service, congestion, parking costs, and social consciousness are likely motivators for transit use among these Riders.
	In addition, Riders surveyed in 2014 are older than the general population. Notably, more than four out of ten riders surveyed in 2014 are 55 and older, compared to just three out of ten individual in the general population. The increase in the percentage of older riders surveyed occurred within the 55+ age group, with a corresponding decreased in the percentage between the ages of 18 and 44.	Male	52%	47%	
		Female	48%	53%	
		16–17	3%	3%	
		18–34	29%	23%	
		35–54	37%	33%	
		55+	31%	41%	
		Mean	44.8	48.3	
	Riders are somewhat less affluent than the general population.	Employed	64%	65%	
		Not Employed	36%	35%	
		<\$35,000	24%	26%	
		\$35K–<\$75K	28%	30%	
	More than four out of five Riders have a driver’s license and/or access to a vehicle	\$75K–<\$100K	13%	12%	
		\$100K +	35%	31%	
Median		\$70,998	\$66,448		
% with License		n.a.	83%		
	% with Vehicle in Household	91%	88%		
	* Source: 2013 American Community Survey three-year estimates				

Topic	What We Found			What It Means
Regular and Infrequent Riders	Three out of five (59%) Riders are Regular Riders—that is, they take five or more one-way rides monthly.	REGULAR Riders	INFREQUENT Riders	Regular and Infrequent Riders are two distinct segments demographically and, as shown in the next section, have very different travel behaviors.
		Male	48%	44%
	<ul style="list-style-type: none"> Seattle / North King County and, to a lesser extent, South King riders are the most likely to be Regular Riders (62% and 60%, respectively). East King County has the highest percentage of Infrequent Riders (45%). 	Female	52%	56%
		16–17	3%	2%
	Infrequent Riders are significantly older than Regular Riders—more than half are 55 or older, and nearly one-quarter are retired.	18–34	28%▲	15%▼
		35–54	34%	30%
	Regular Riders are more likely than Infrequent Riders to be employed or students. However, they are less affluent than Infrequent Riders.	55+	35%▼	52%▲
		Mean	45.4▼	53.0▲
	Regular Riders are more diverse than Infrequent Riders and are similar to the general population.	Employed	68%▲	60%▼
		Student	14%▲	6%▼
		Not Employed	28%▼	40%▲
		<\$35,000	28%	24%
		\$35K–<\$75K	31%	29%
		\$75K–<\$100K	12%	14%
		\$100K +	30%	34%
		Median	\$63,775▼	\$71,297▲
		% Caucasian	71%▼	83%▲
		% Asian	14%▲	6%▼
		% Black	5%▲	3%▼
		% Hispanic	7%	5%
		% with License	77%▼	93%▲
		% with Vehicle in Household	85%▼	93%▲
		▲ / ▼ indicates a statistically significant difference between respondent groups		

Topic	What We Found			What It Means	
Regular Riders	Seven out of ten (69%) Regular Riders are Frequent Regular Riders—that is, they take 11 or more one-way rides monthly.			The differences in age between the three rider segments (Frequent Regular, Moderate Regular, and Infrequent Riders) and corresponding employment status suggest opportunities for generational segmentation and marketing communications.	
	<ul style="list-style-type: none">South King County has the highest percentage of Frequent Regular Riders—nearly three out of four (74%) are Frequent Regular Riders.	Frequent Regular Riders	Moderate Regular Riders		
		16–17	3%		4%
		18–34	29%		24%
		35–54	36%		30%
		55+	31%▼		42%▲
		Mean	44.1▼		48.3▲
		Employed	74%▲		55%▼
		Student	15%		11%
		Not Employed	22%▼		45%▲
	▲ / ▼ indicates a statistically significant difference between respondent groups				
	With the exception of age and employment status, there are few demographic differences between Frequent and Moderate Regular Riders.				
	Frequent Regular Riders are:				
	<ul style="list-style-type: none">Significantly younger (average age 44) than Moderate Regular Riders.More likely to be employed.				
	Moderate Regular Riders are				
	<ul style="list-style-type: none">Significantly older (average age 48) than Frequent Regular Riders but younger than Infrequent Riders (average age 53).Less likely to be employed; one-fourth (24%) are retired.				

Topic	What We Found			What It Means	
Low-Income Riders	One out of four (24%) Riders have a household income that is below \$35,000—that is, are Low-Income Riders.			King County Metro provides an important social service for those who have limited options for travel. This is a diverse segment and is likely to have varying travel needs.	
		≤\$35K	>\$35K		
		Male	42%		48%
		Female	58%		52%
	<ul style="list-style-type: none">One out of three (34%) South King County Riders are Low-Income Riders.	16–17	2%		3%
		18–34	29%▲		21%▼
		35–54	25%▼		36%▲
		55+	45%		40%
		Mean	48.1		48.5
	Low-Income Riders cross all age groups.	Employed	40%▼		74%▲
		Student	17%▲		9%▼
	<ul style="list-style-type: none">However, a relatively higher percentage are between the ages of 18 and 34 and, to a lesser extent, 55 and older.	Not Employed	58%▲		23%▼
	Only two out of five Low-Income Riders are employed.	Median	\$17,986		\$121,094
		% Caucasian	65%▼		81%▲
		% Asian	9%		11%
		% Black	9%▲		3%▼
	<ul style="list-style-type: none">Nearly one out of five are students.	% Hispanic	13%▲		4%▼
		% with License	61%▼		92%▲
		% with Vehicle in Household	61%▼		97%▲
Nearly three out of five Low-Income are unemployed.	▲ / ▼ indicates a statistically significant difference between respondent groups				
<ul style="list-style-type: none">20% are retired16% are not currently employed17 % are disabled					
Low-Income Riders are diverse.					
Only three out of five Low-Income Riders have a driver’s license and/or access to a vehicle.					

FINDINGS: RIDERS' GENERAL TRAVEL BEHAVIOR

Topic	What We Found			What It Means	
Frequency of Travel	<p>After peaking in 2012, the average number of one-way trips taken by Regular Riders has decreased among those living in Seattle / North King County and East King County.</p> <p>On the other hand, the average number of one-way trips taken by Regular Riders living in South King County has been increasing; current frequency is significantly greater than 2012.</p>	2012	2013	2014	<p>The decrease in the average number of trips taken by Regular Riders may be due to a number of factors—a decrease in overall travel or access to alternative modes such as car and bike share programs.</p> <p>South King County is experiencing increases in both number of Riders and the average number of trips those Riders make.</p> <p>The decrease in trip frequency in East King County has been offset by ongoing growth in the number of Riders.</p>
		All REGULAR Riders			
		26.9	26.1	24.5	
		Seattle / North King County			
		28.4	27.5	24.1 ▼	
		South King County			
		24.5	25.3	27.0	
		East King County			
		25.0	22.8 ▼	22.4	
Significant increase (▲) or (▼) from previous year					
Length of Time Riding	<p>While the majority of Riders are Experienced Riders (riding Metro more than one year), between 12 and 15 percent are New Riders (that is, started riding in the past year).</p> <p>Reflecting growth in market share, a greater percentage of Riders living in South and East King County are New Riders.</p> <ul style="list-style-type: none">The percentage of New Riders increased significantly in South King County. <p>Relatively few Riders in Seattle / North King County started riding in the past year.</p>	2012	2013	2014	<p>Metro’s ridership growth can be attributed to the combination of retaining Experienced Riders, even as they move through lifestyle changes, as well as attracting New Riders.</p> <p>The decline in the percentage of New Riders in Seattle / North King County may be of some concern.</p>
		% New Riders			
		13%	12%	14%	
		Seattle / North King County			
		10%	12%	6% ▼	
		South King County			
		17%	12%	19% ▲	
		East King County			
		20%	15%	19%	
Significant increase (▲) or (▼) from previous year					

Topic	What We Found			What It Means		
New Rider Demos	New Riders are significantly younger than Experienced Riders—nearly two out of five are millennials. The majority of New Riders are employed; however, a significant number are students. Even with a high percentage of students, New Riders are as affluent as Experienced Riders.		New Riders	Experienced Riders	Retaining these new younger Riders, notably as they transition from being students to employees, is key to long-term growth. Millennials have significantly different lifestyles, values, and motivations as well as different ways of communicating. Use of social media, mobile devices, and other technologies will be important to reach these Riders.	
		16–17	5%	3%		
		18–34	38%▲	21%▼		
		35–54	33%	33%		
		55+	24%▼	44%▲		
		Mean	41.0▼	49.5▲		
		Employed	56%▼	66%▲		
		Student	21%▲	9%▼		
		Not Employed	30%	33%		
	Median Income	\$67,105	\$67,890			
	▲ / ▼ indicates a statistically significant difference between respondent groups					
Primary Trip Purpose	While over time the majority of Riders have primarily used Metro to commute to work or school, a significant percentage use Metro for non-commute travel. • Those primarily using Metro for commute trips average 23 one-way trips per month while those primarily using Metro for non-commute trips average 7 one-way trips per month. The percentage primarily using Metro for non-commute trips increased somewhat in 2014. This increase is significant among riders living in Seattle / North King County.		2012	2013	2014	Riders using Metro for commute trips are clearly Metro’s core market—they are the larger segment, and they take more than three times as many trips per month. At the same time, those using Metro for non-commute trips represent an important source of incremental ridership. The increase in those primarily using Metro for non-commute trips in Seattle / North King County may reflect in part the older demographics among Riders in this market as well as less access to a vehicle.
			ALL Riders			
		Commute	56%	60%▲	56%▼	
		Non-Commute	44%	40%▼	44%▲	
			Seattle / North King County			
		Commute	56%	59%	51%▼	
		Non-Commute	44%	41%	49%▲	
			South King County			
		Commute	56%	59%	56%	
		Non-Commute	44%	41%	44%	
			East King County			
		Commute	55%	64%	62%	
		Non-Commute	45%	36%	38%	
			Significant increase (▲) or (▼) from previous year			

Topic	What We Found				What It Means	
Other Trips on Metro	<p>New questions were added in 2014 to provide insights into the extent Riders use Metro for trips in addition to their primary trip. Specifically, Riders were asked what percent of their total trips were represented by their primary trip.</p> <p>Two out of three Riders only use Metro for their primary trip.</p> <ul style="list-style-type: none">The relatively small segment of Riders who primarily use Metro to commute to school are the most likely segment to use Metro for trips other than their primary one.	ALL Riders			<p>There are additional opportunities for ridership growth by encouraging those who only use Metro for their primary trip, notably those who only use Metro to commute to work, to use Metro for additional non-commute trips.</p>	
		Only Use for Primary Trip 68%				
		Mostly Use for Primary Trip 18%				
		Other Trips 14%				
		% of Riders who Only Use Metro for Primary Trip by Primary Trip Type				
		To / From Work 69%				
		To / From School 44%				
		Non-Commute 72%				
Dependence on Metro	<p>The majority of Riders are “Choice Riders,” relying on Metro for some or very little of their transportation needs.</p> <p>The extent to which Riders rely on Metro for all or most of their transportation needs has varied over the years.</p> <ul style="list-style-type: none">The percentage of Regular Riders who rely on Metro for all or most of their transportation needs decreased significantly in 2014, due to a decrease in the extent to which Frequent Regular Riders rely on Metro for all or most of their travel.	2012	2013	2014	<p>King County continues to be a car-reliant community for at least some travel, making most Riders, even those who rely on Metro for a significant amount of their travel, Choice Riders. It is important to understand the other factors that motivate these riders’ decision to use transit and to provide the type and quality of service they expect.</p> <p>The decrease in the percentage of riders who rely on Metro for all or most of their transportation needs is explained by the decrease in the percentage of Frequent Regular Riders who rely on Metro for all or most of their transportation needs.</p>	
		ALL Riders				
		All / Most	34%	36%		31%▼
		Some Travel	37%	34%		35%
		Very Little	29%	30%		34%▲
		REGULAR Riders				
		All / Most	47%	51%▲		45%▼
		Frequent Regular Riders				
		All / Most	57%	62%		55%▼
		Moderate Regular Riders				
		All / Most	23%	30%▲		24%
		INFREQUENT Riders				
		All / Most	11%	10%		7%
		Significant increase (▲) or (▼) from previous year				

Topic	What We Found			What It Means	
Transit Reliant Riders Demographics	Riders who rely on Metro for all or most of their travel are clearly differentiated by their income. While the majority are employed, a significant number are unemployed or disabled. Four out of ten do not have a driver’s license; three out of ten do not have access to a vehicle.	Transit Reliant* Riders		While a large percentage of Metro’s transit-reliant market is what is traditionally considered Captive Riders—that is, low-income, with no access to vehicles—this is likely too narrow a view. New transit research is looking into further understanding what is being called the “Captive by Choice” market—that is, Riders who have chosen to give up vehicles and rely primarily on public transportation.	
		<\$35K	44%		
		Median	\$43,824		
		Employed	61%		
		Student	15%		
		Retired	13%		
		Unemployed	10%		
		Disabled	10%		
Transfer Rates	The percentage of Riders reporting that they do not transfer increased significantly in 2014, returning to 2010 levels. <ul style="list-style-type: none">Riders in Seattle / North and East King County are least likely to have to transfer for their primary trip.The increase in Riders reporting no transfer (for their primary trip) is greatest among those living in South King County, traditionally the area where more riders had to transfer.	2012	2013	2014	Despite recent service cuts and modifications, Riders increasingly report having access to a route for their primary trip that does not require a transfer. Access to service is an important determinant of mode choice, and the increased access to direct service may account for the increases in ridership the system is experiencing.
		% of Riders who Do Not Transfer (Primary Trip)			
		50%	48%	61%▲	
		Seattle / North King County			
		52%	55%	67%▲	
		South King County			
		38%	32%	52%▲	
		East King County			
58%			56%	62%	
Significant increase (▲) or (▼) from previous year					

Topic	What We Found			What It Means	
Park-and-Ride Lot Use	Overall park-and-ride lot use has been increasing. However, trends in use vary by geographic area. <ul style="list-style-type: none">Use of park-and-ride lots continues to be highest in East King County; however, usage in this area has trended downwards since 2010, when 77% of all East King County Riders used a park-and-ride lot.	2012	2013	2014	Metro’s park-and-ride lot system continues to provide an important means for accessing service, particularly for Riders living in East and South King County. Increased access to direct service among riders living in Seattle / North King County may account for the recent decrease in use of park-and-ride lots among Riders in this area.
		% of Riders Using Park-and-Ride Lots in Past Year			
		33%	35%	39%▲	
		Seattle / North King County			
		18%	19%	15%▼	
		South King County			
		49%	43%	46%	
		East King County			
		69%	66%	62%	
		# of Time Use Park-and-Ride Past 30 Days			
		33%	35%	39%▲	
		Seattle / North King County			
		18%	19%	15%▼	
		South King County			
		49%	43%	46%	
		East King County			
		69%	66%▼	62%▼	
		Significant increase (▲) or (▼) from previous year			

FINDINGS: RIDERS' COMMUTE BEHAVIOR

Topic	What We Found			What It Means	
Commute Status	Consistent with the increase in older Riders surveyed, we see an increase in the percentage of riders who do not commute to work or school—that is, are Non-Commuters. Despite this increase, nearly two out of three Riders commute to work or school. Note that not all riders who are Commuters use Metro for their commute trips.	2012	2013	2014	The percentage of Riders who commute to work (57%) is somewhat lower than the percentage of work commuters in the general population of King County (63%). Therefore, while Metro clearly serves Work Commuters, it is also an important source of travel for those commuting to School and Non-Commuters.
		Commute to Work			
		58%	61%	57%	
		Commute to School			
		12%	10%	9%	
		Non-Commuter			
30%	29%	35%▲	Significant increase (▲) or (▼) from previous year		
Metro Commuters	Nearly three out of five Commuters who are Riders use Metro to get to work or school. Among Regular Riders, this figure jumps to four out of five. This is the highest percentage to date and has been increasing at a significant level since 2012. The increase in Riders’ use of Metro to commute to work or school is greatest in Seattle / North and South King County.	2012	2013	2014	Better and more direct service, high parking costs, traffic congestion, and general comfort with using public transportation are likely contributors to increased transit use for commuting among existing riders. Better understanding the motives behind the mode choice decision for commuting could lead to increased use of Metro by Commuters who are Infrequent Riders and Non-Riders.
		ALL Riders			
		53%	55%	58%	
		REGULAR Riders			
		69%	75%▲	80%▲	
		Seattle / North King REGULAR Riders			
		67%	73%	76%▲	
		South King REGULAR Riders			
		76%	82%	86%▲	
		East King REGULAR Riders			
73%	72%	79%	Significant increase (▲) or (▼) from previous year For subareas, significant increases from baseline (2012)		

Topic	What We Found			What It Means
Commute Mode by Major Work Location	Nearly half of all Metro Riders who commute work in downtown Seattle or the areas immediately surrounding the downtown core.	% Commute To		% Using Metro
		Downtown Seattle	27%	
	Use of Metro is similar across the major destinations with the exception of the areas immediately surrounding the downtown Seattle core.	Surrounding DT Seattle	20%	
		University of Washington	9%	
		Downtown Bellevue	4%	
				While there is service available to the areas surrounding downtown Seattle, in many cases it may require a transfer. This coupled with the availability of parking may be a barrier to transit use.

FINDINGS: FARE PAYMENT

Topic	What We Found			What It Means	
Fare Payment Method	ORCA Cards are used by more than three out of five Riders. Overall use of ORCA Cards increased by 2 percentage points in 2014. Use of cash to pay fares increased significantly between 2012 and 2013 and remained unchanged in 2014. Reflecting the higher percentage of older riders surveyed in 2014, the percentage of Riders using a Reduced Regional Fare Permit (RRFP) increased significantly. More than four out of five (84%) riders using an RRFP have the permit loaded on an ORCA Card, up from 72% in 2013.	2012	2013	2014	As noted over the past several years, ORCA Cards have likely hit close to maximum adoption rates without new, value-added features. The very small growth in ORCA Card use between 2013 and 2014 is in part attributable to increased adoption among older Riders with their RRFP on an ORCA Card as well as increased adoption among Frequent Regular Riders. Moving Infrequent Riders from cash to some form of cashless payment system is likely to be difficult without some form of incentive. While more older Riders were surveyed in 2014, these Riders may be recently retired and already had an ORCA Card.
		ORCA (Includes Adult, Youth, U-PASS and RRFP on CARD)			
		66%	66%	68%	
		CASH / TICKETS			
		22%	28%▲	27%	
		RRFP (Includes RRFP On and Not On ORCA Card)			
		14%	12%	16%▲	
Significant increase (▲) or (▼) from previous year					

Topic	What We Found			What It Means																		
Products on ORCA Card	<p>The majority of ORCA users have an E-Purse on their card. The percentage of ORCA users with an E-Purse increased significantly in 2014. (Eight percent have a pass on their ORCA Card as well, up from just 3% in 2013).</p> <p>The percentage of ORCA users with a pass on their card has remained virtually unchanged for the past two years.</p>	<table><thead><tr><th></th><th>2013</th><th>2014</th></tr></thead><tbody><tr><td>TOTAL PASS</td><td>38%</td><td>36%</td></tr><tr><td>TOTAL E-PURSE</td><td>41%</td><td>52%▲</td></tr><tr><td>E-PURSE ONLY</td><td>38%</td><td>45%▲</td></tr><tr><td>PASS OHLY</td><td>35%</td><td>28%▼</td></tr><tr><td>PASS AND E-PURSE</td><td>3%</td><td>8%▲</td></tr></tbody></table> <p>Significant increase (▲) or (▼) from previous year</p>			2013	2014	TOTAL PASS	38%	36%	TOTAL E-PURSE	41%	52%▲	E-PURSE ONLY	38%	45%▲	PASS OHLY	35%	28%▼	PASS AND E-PURSE	3%	8%▲	<p>ORCA users are increasingly likely to have an E-Purse on their ORCA Cards, either by itself or in combination with a pass.</p> <p>This would suggest that ORCA Card users pay close attention to cost of a pass versus simply having an E-Purse and choose an E-Purse if their riding frequency does not warrant a pass. Having an E-Purse also allows for occasional use on other agencies / modes such as Sound Transit or Washington State Ferries or to pay for a companion’s fare.</p> <p>ORCA Card users who have a pass on their card may be more likely to supplement the lowest cost pass to support their typical trip and pay with an E-Purse for other trips with a higher fare rather than purchase a higher cost pass and not use the full value.</p>
			2013	2014																		
TOTAL PASS	38%	36%																				
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PASS AND E-PURSE	3%	8%▲																				
Subsidies	<p>The extent to which Riders state their employer or school subsidizes passes and/or E-Purses has been decreasing since 2010, when nearly three out of four (73%) riders received a subsidy.</p>	<table><thead><tr><th>2012</th><th>2013</th><th>2014</th></tr></thead><tbody><tr><td colspan="3">RECEIVE SUBSIDY</td></tr><tr><td>59%</td><td>54%</td><td>52%</td></tr></tbody></table> <p>Significant increase (▲) or (▼) from previous year</p>		2012	2013	2014	RECEIVE SUBSIDY			59%	54%	52%	<p>Instead of offering subsidies, employers may be encouraging employees to elect to place tax-free dollars into their flexible spending accounts (FSAs) or transportation spending accounts (TSA) to pay for the transportation benefits (e.g., transit passes, vanpool costs, parking, etc.).</p>									
2012	2013	2014																				
RECEIVE SUBSIDY																						
59%	54%	52%																				

FINDINGS: SOURCES OF INFORMATION ABOUT METRO

Topic	What We Found			What It Means	
Information Sources	Riders use multiple sources to get information about Metro.	% OF RIDERS WHO FREQUENTLY / SOMETIMES USE		As will be noted in the service quality section, Riders are increasingly satisfied with their ability to get information online. Given wide use, this service is important to maintain. Riders are less satisfied with information at bus stops. Given wide use, this should be a targeted area for improvements. Metro should continue to work with local and national developers to develop apps for smartphones. If Metro eliminates printed timetables it is likely to affect a significant number of Riders.	
	Online sources are the most frequently used source of information.	METRO ONLINE AND/OR REGIONAL TRIP PLANNER	67%		
	<ul style="list-style-type: none">Two out of three Riders use Metro Online and/or the Regional Trip Planner.	INFORMATION AT STOPS	66%		
	<ul style="list-style-type: none">Just over half of all Riders use a smartphone to get information about Metro; this figure jumps to three out of four among smartphone owners.	SMARTPHONE	52%		
	Riders also rely heavily on information posted at stops, transit centers, and park-and-ride lots. Just over half of all riders continue to use printed timetables.	PRINTED TIMETABLES	51%		
		ALERTS (EMAIL AND/OR TEXT)	17%		
		CUSTOMER SERVICE CALL CENTER	12%		
		SOCIAL MEDIA	9%		
Smartphones	Nearly seven out of ten Riders have a smartphone, down from 2013.	2012	2013	2014	While smartphone ownership is high and represents an important source of information about Metro, not all Riders have smartphones. Notably, lower income and older Riders are less likely to own a smartphone; they may also be less likely to have access to a computer and/or the Internet. These Riders need alternative sources of information.
	<ul style="list-style-type: none">Smartphone ownership in King County is higher than the national average of 58%*.	SMARTPHONE OWNERSHIP			
		60%	76%▲	69%▼	
	Riders, notably Moderate Regular and Infrequent Riders, are increasingly using smartphones to get information.	USE TO GET INFORMATION ABOUT METRO FREQUENT REGULAR RIDERS			
		83%	83%	81%	
		MODERATE REGULAR RIDERS			
		69%	77%	79%▲	
		INFREQUENT RIDERS			
	55%	56%	67%▲		
<i>*Source: http://www.pewinternet.org/data-trend/mobile/cell-phone-and-smartphone-ownership-demographics/</i>					
<i>Significant increase (▲) or (▼) from previous year</i>					

FINDINGS: OVERALL SATISFACTION WITH METRO AND GOODWILL

Topic	What We Found			What It Means	
Overall Satisfaction	After several years of declining overall satisfaction ratings, Riders’ overall satisfaction with Metro increased significantly. <ul style="list-style-type: none">The percentage very satisfied increased and the percentage dissatisfied decreased.	2012	2013	2014	While the service cuts do have an impact on riders’ satisfaction with specific elements of service, Metro’s management of these cuts coupled with improvements in some very important areas, such as personal safety, has paid off.
		TOTAL SATISFIED			
		88%	85%▼	90%▲	
		VERY SATISFIED			
		46%	42%▼	46%▲	
		DISSATISFIED			
10%	14%▲	10%▼			
Significant increase (▲) or (▼) from previous year					
Expectations for Service	Overall there has been no significant change in Riders’ expectations for service and whether Metro delivers on these expectations. <ul style="list-style-type: none">Overall satisfaction with Metro increased significantly for those who have high expectations.Overall satisfaction remained unchanged for those with low or mixed expectations.	Expectations			Those with high expectations may have expected issues with the service cuts that may not have been realized and so became more satisfied. Those with low expectations may have expected that service cuts would cause issues. Their expectations may have been met and they remained dissatisfied.
		20132014			
		Expect high quality & confident can deliver	23%	23%	
		Expect high quality & generally positive can deliver	48%	47%	
		Have low or mixed impressions & expect problems	29%	30%	
		% Very Satisfied with Metro by Expectations			
		% Very Satisfied20132014			
		Expect high quality & confident can deliver	72%	82%▲	
		Expect high quality & generally positive can deliver	43%	51%▲	
		Have low or mixed impressions & expect problems	14%	11%	
Significant increase (▲) or (▼) from previous year					

Topic	What We Found			What It Means																					
External Influences	<p>The majority of Riders continue to hear good things about Metro from their friends and colleagues.</p> <ul style="list-style-type: none">However, negative word of mouth has a significant influence on overall satisfaction. <p>On the other hand, negative influences from the media are increasing.</p> <ul style="list-style-type: none">Negative media coverage has less of an impact on overall satisfaction with Metro.	<table><tr><td></td><td>2013</td><td>2014</td></tr><tr><td colspan="3">Word of Mouth</td></tr><tr><td>Agree</td><td>67%</td><td>62%▼</td></tr><tr><td>Disagree</td><td>28%</td><td>30%</td></tr><tr><td colspan="3">Media</td></tr><tr><td>Agree</td><td>63%</td><td>46%▼</td></tr><tr><td>Disagree</td><td>32%</td><td>46%▲</td></tr></table>			2013	2014	Word of Mouth			Agree	67%	62%▼	Disagree	28%	30%	Media			Agree	63%	46%▼	Disagree	32%	46%▲	Metro should continue to use social media as well as more traditional media sources to tell a positive story about the system.
			2013	2014																					
		Word of Mouth																							
		Agree	67%	62%▼																					
		Disagree	28%	30%																					
		Media																							
		Agree	63%	46%▼																					
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		Significant increase (▲) or (▼) from previous year																							
		% Satisfied with Metro by Hear Positive Things about Metro Word of Mouth																							
		<table><tr><td></td><td>2013</td><td>2014</td></tr><tr><td>Strongly Agree</td><td>90%</td><td>99%▲</td></tr><tr><td>Somewhat Agree</td><td>85%</td><td>94%▲</td></tr><tr><td>Disagree</td><td>20%</td><td>29%▲</td></tr></table>			2013	2014	Strongly Agree	90%	99%▲	Somewhat Agree	85%	94%▲	Disagree	20%	29%▲										
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Significant increase (▲) or (▼) from previous year																									
Agency Relations	<p>Riders in 2014 are significantly more likely than those in 2013 to say they strongly agree that they like to be able to say they ride Metro.</p> <ul style="list-style-type: none">This increase is evident countywide. However, those living in Seattle / North King County are the least likely to strongly agree.	<table><tr><td></td><td>2013</td><td>2014</td></tr><tr><td colspan="3">% Strongly Agree</td></tr><tr><td>Agency I like & respect</td><td>44%</td><td>45%</td></tr><tr><td>Agency I trust</td><td>43%</td><td>47%</td></tr><tr><td>I like to be able to say I ride</td><td>41%</td><td>56%▲</td></tr></table>			2013	2014	% Strongly Agree			Agency I like & respect	44%	45%	Agency I trust	43%	47%	I like to be able to say I ride	41%	56%▲	Marketing communications focusing on riders saying why they like to ride Metro may serve to offset negative word of mouth and/or media coverage.						
			2013	2014																					
		% Strongly Agree																							
		Agency I like & respect	44%	45%																					
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		I like to be able to say I ride	41%	56%▲																					
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Topic	What We Found			What It Means
High Value / Customer Focus	Riders continue to agree that Metro provides good value for the level of service it provides and, to a lesser extent, values its customers. They are less likely to agree that Metro provides excellent customer service and has consistently high service standards. Riders are least likely to strongly agree that Metro is innovative. Further, agreement with this statement decreased significantly in 2014.			There are opportunities to build support for Metro’s brand and perceptions of its focus on value and customers. As revenues improve, Metro should look for opportunities to provide more innovative services. New options for fare payment, real-time schedule information, and smartphone apps are potentials area in which existing innovations could be adopted by Metro.
Goodwill Index	As in 2013, a Goodwill Index was created to reflect the influence of External Relations, Agency Relations, and Advocacy (like to be able to say I ride Metro) have on Riders’ satisfaction with and expectations of Metro. It should be noted that some questions asked in 2013 were not asked in 2014 and so a new index was computed. While the overall Goodwill Index, decreased slightly between 2013 and 2014, this decrease is statistically significant only among Regular Riders, notably Frequent Regular Riders.			Despite the service changes and negative media coverage, Riders’ goodwill was not significantly impacted. As subsequent analysis shows Frequent Regular Riders were more likely to be impacted by the service changes and hence are more likely to have lost some goodwill towards Metro. Given the high influence of Riders’ trust in Metro, efforts should focus on building greater trust in the agency and confidence that the decisions being made are in the best interests of both the agency and its customers.

Topic	What We Found			What It Means
Value and Customer Focus Index	A second index was computed to reflect the influence of Riders’ perception of Metro’s focus on the customer and providing high value service on their satisfaction with and expectations of Metro.			The lower rating for Value and Customer Focus than Goodwill suggests that while Riders have generally positive impressions of Metro as an agency (goodwill), they are somewhat less positive that Metro meets their expectations for delivering high value service with a focus on the customer.
		2013	2014	
	All Riders	3.20	3.22	
	Regular Riders	3.22	3.19	
	Frequent Regular Riders	3.20	3.18	
	Moderate Regular Riders	3.24	3.20	
	Infrequent Riders	3.16	3.27	
Overall Metro has a Value / Customer Focus Index of 3.22, suggesting an average rating. There was no change from 2013.				
Value & Customers Index is based on a 5-point scale where “1” represents “very low” value / customer focus and “5” represents “very high” value / customer focus Significant increase (▲) or (▼) from previous year				

FINDINGS: SERVICE QUALITY

Topic	What We Found			What It Means
Satisfaction with Overall Service Dimensions	<p>Riders continue to be very satisfied with Fare Payment, Metro Drivers, and Sources of Information about Metro.</p> <ul style="list-style-type: none">Satisfaction with Sources of Information about Metro increased in 2014.Satisfaction with Metro Drivers decreased slightly. <p>The percentage of Very Satisfied Riders increased significantly for Personal Safety.</p> <p>The percentage of Very Satisfied Riders decreased significantly for:</p> <ul style="list-style-type: none">TransferringComfort and Cleanliness OnboardLevel of Service (LOS)Park-and-Ride Lots		% VERY SATISFIED 20132014	It is clear that service changes enacted in September 2014 had an impact on Riders’ satisfaction with many aspects of service, but notably for the Level of Service provided and Transferring. As later analysis indicates, these are the single most important aspects of Metro service.
		FARE PAYMENT	75%76%	
		METRO DRIVERS	68%65%▼	
		INFORMATION SOURCES	60%66%▲	
		PERSONAL SAFETY	46%50%▲	
		PARK-AND-RIDE LOTS	48%42%▼	
		LEVEL OF SERVICE (LOS)	50%41%▼	
		STOPS: COMFORT/ CLEANLINESS	38%36%	
		ONBOARD: COMFORT / CLEANLINESS	43%36%▼	
		TRANSFERRING	39%30%▼	
			Significant change (▲) or (▼) from previous year	

Topic	What We Found			What It Means
Highest Rated Elements of Service (60%+ Very Satisfied)	<p>Consistent with high ratings for the overall service dimensions, all aspects of Fare Payment and Information Sources are rated highly:</p> <ul style="list-style-type: none"> Satisfaction with the Ease of Paying Fares when Boarding increased significantly. Satisfaction with ORCA Cards also increased. The Availability of Information on Metro Online increased significantly. However, satisfaction with the Availability of Locations to Purchase Passes or Add Value to an E-Purse decreased. <p>The increase in satisfaction for the Personal Safety dimension is due in part to a significant increase in Riders' satisfaction with Daytime Safety at Stops.</p>		% VERY SATISFIED	<p>The quality of Metro's fare payment system is evident in these high ratings, and continued innovation should be considered. At the same time, efforts should be made to make it easier for Riders to purchase passes or add value to their E-Purse either online or through more convenient fixed locations.</p> <p>Metro should continue to focus on providing quality and accurate information. Online sources—either developed by Metro or third-party sources—should be a priority.</p> <p>Metro should continue its focus on safety improvements, the recent success of which is evident here.</p>
			2013 2014	
		FARE: ORCA CARDS	83% 87% ▲	
		FARE: EASE OF PAYING WHEN BOARDING	76% 81% ▲	
		FARE: EASE OF LOADING PASS	68% 76%	
		DRIVERS: OPERATE VEHICLES SAFELY	77% 74%	
		INFO: AVAILABILITY ONLINE	60% 71% ▲	
		SAFETY: DAYTIME AT STOPS	63% 70% ▲	
		FARE: EASE OF ADDING VALUE TO E-PURSE	71% 68%	
		DRIVERS: HELPFULNESS	64% 66%	
		INFO: OVERALL ABILITY TO OBTAIN	60% 63%	
		▲ / ▼ indicates significant (95%) change from previous year		
		▲ / ▼ indicates significant (90%) change from previous year		

Topic	What We Found			What It Means
Above-Average Ratings (50–59% Very Satisfied)	While satisfaction also improved for Daytime Safety Onboard Metro vehicles, Riders are less likely to be very satisfied with how well Drivers Handle Problems on the vehicles when they occur. Satisfaction with Distance from Home to Stop has decreased, notably among South King County Riders.		% VERY SATISFIED 2013 2014	Additional training and support for drivers so they can effectively handle problems or incidents should be a continued focus. Particular attention should be on routes serving Seattle / North and South King County. Again, service changes made in September have affected riders who now have to walk further to a stop.
		SAFETY: DAYTIME ONBOARD	51% 59% ▲	
		DRIVERS: HANDLE PROBLEMS	64% 55% ▼	
		FARE: LOCATIONS TO PURCHASE PASS / ADD VALUE TO E-PURSE	61% 54% ▼	
		LOS: DISTANCE FROM HOME TO STOP	64% 52% ▼	
		SAFETY: DT TRANSIT TUNNEL	48% 51%	
Below-Average Ratings (40–49% Very Satisfied)	Most elements of service in this category (below-average) were in this same category of service in 2013. Several aspects of Park-and-Ride Lots (e.g., Lighting and Personal Safety) moved from having above-average ratings to now having below-average ratings, due to somewhat lower percentages of very satisfied users. Satisfaction decreased for all elements of service within the Level of Service dimension. The decrease is greatest for Availability of Service.		% VERY SATISFIED 2013 2014	Lighting and Personal Safety at Park-and-Ride Lots are related, and ratings for these two elements of service decreased. Increased lighting at park-and-ride lots identified as having little or no lighting as well as those with a higher number of reported security incidents could move these two elements of service back into a potential strength. Ratings for Level of Service could only improve if service is restored.
		P&R LOTS: LIGHTING	54% 48%	
		ONBOARD: CLEANLINESS	46% 47%	
		P&R LOTS: PERSONAL SAFETY	52% 46%	
		STOPS: LOADING / UNLOADING DUE TO CROWDING	49% 45%	
		INFO: AVAILABILITY AT STOPS	n.a. 45%	
		LOS: ON-TIME PERFORMANCE	46% 41% ▼	
		LOS: TRAVEL TIME	43% 41%	
		STOPS: CLEANLINESS	38% 41%	
		LOS: AVAILABILITY OF SERVICE	51% 40% ▼	
		ONBOARD: AVAILABILITY OF SEATING	47% 40%	
		P&R LOTS: VEHICLE SECURITY	44% 40%	

Topic	What We Found			What It Means
Lowest Rated Elements of Service (<40% Very Satisfied)	Onboard Safety After Dark and At Stops continue to be two of the lowest rated elements of service.		% VERY SATISFIED 2013 2014	<p>Metro should continue to focus its efforts on safety after. Particular focus should be on stops in downtown Seattle and other high-ridership areas in Seattle / North King County.</p> <p>Reduction in service in areas with high ridership aggravates the crowding issue.</p> <p>While more riders report having direct service, those who have to transfer are increasingly dissatisfied. Riders living in South King County continue to be the most likely to take trips that require a transfer, and reported wait times are longer for these riders.</p>
	<ul style="list-style-type: none"> However, satisfaction with Onboard Safety after Dark has increased significantly. While overall satisfaction with Safety at Stops after Dark did not change, the percent of Seattle / North King County Riders very satisfied with this element of service decreased significantly. 	SAFETY: ONBOARD AFTER DARK	30% 37% ▲	
	Overcrowding on Buses continues to be the element of service with which Riders are least satisfied.	ONBOARD: LOADING / UNLOADING DUE TO CROWDING	48% 36% ▼	
	<ul style="list-style-type: none"> Satisfaction with all elements of service related to crowding on the vehicles has decreased, notably on routes serving Seattle / North King County. 	LOS: FREQUENCY OF SERVICE	45% 36% ▼	
	Transferring, notably Wait Times when Transferring, also continues to be an area with low levels of satisfaction.	TRANSFERS: NUMBER	44% 35% ▼	
		STOPS: AVAILABILITY OF SHELTERS	33% 35%	
		P&R LOTS: PARKING AVAILABILITY	45% 34% ▼	
		STOPS: LIGHTING	33% 33%	
		STOPS: AVAILABILITY OF SEATING	35% 29% ▼	
		SAFETY: AT STOPS AFTER DARK	31% 28%	
		TRANSFERS: WAIT TIME	35% 26% ▼	
		ONBOARD: OVERCROWDING	29% 21% ▼	

Key Drivers Analysis

This survey asked riders about their satisfaction with 36 service elements. Statistical analysis was used to group these service elements into nine Overall Service Dimensions, and to identify the importance of these Overall Service Dimensions and the individual service elements, in determining Rider satisfaction with and expectations of Metro. This summary table is ordered based on the importance of the Overall Service Dimension followed by the importance of the elements of service.

Level of Service (LOS) and Transferring continue to be the most important determinants of Riders' satisfaction with and expectations of Metro. Level of Service is more important than Transferring.

- With the exception of Distance from Home to Stop, all elements of service within the LOS dimension receive below-average satisfaction ratings.

Personal Safety is the third most important service dimension.

- While satisfaction has improved, Safety after Dark is still a concern.

Comfort and Cleanliness At Stops and, to a lesser extent, Onboard are also important service dimensions.

- All elements of service within the Comfort and Cleanliness at Stops Dimension receive below-average ratings.

High Importance / Below-Average Satisfaction: Improve		
	Imp. Rank	% Very Satisfied
Level of Service (LOS)		
• Travel Time	1	41%
• Availability	2	40%
• Frequency	3	36%
• On-Time	4	41%
Personal Safety		
• Stops: Dark	2	28%
• Onboard: Dark	3	37%
Comfort and Cleanliness at Stops		
• Loading/unloading	1	45%
• Lighting	3	33%
• Shelters	2	35%
• Cleanliness	4	41%
• Seating	5	29%
Comfort and Cleanliness Onboard		
• Cleanliness	1	47%
• Crowding	2	21%
• Loading/Unloading	3	36%
Information		
• At Stops	2	45%
Transferring		
• Wait Time	1	26%
• Number	2	35%
High Importance / Above-Average Satisfaction: Maintain		
Level of Service		
• Distance to Stop	5	52%
Personal Safety		
• Stops: Daytime	4	70%
• Onboard: Daytime	1	59%
Drivers		
• Handling Problems	1	55%

Depending on funding and revenues, restoration of service and, where possible, additional service should be a priority.

- The focus should be on Travel Time (the most important element of service) and Frequency of Service (lowest rated).
- Restored or new service to support heavily traveled routes will also address crowding issues.

While continuing to provide more direct service through routes such as the RapidRide or other express services is good, improved scheduling for routes with known links to others to decrease transfer wait times should also be a priority.

Metro should continue its ongoing efforts to improve safety. While the focus should be nighttime safety, daytime safety should not be ignored.

Adding shelters and/or seating at stops should continue to be a priority. Improved lighting can partially address safety concerns with waiting after dark.

Continuing to improve signage at stops, particularly if printed timetables are no longer available, should be an area for improvement.

FINDINGS: PERSONAL SAFETY

In addition to questions on Riders' satisfaction with personal safety (covered in the Service Quality section), questions were included to address Riders' concerns regarding safety and their perceptions of Metro's efforts to improve safety.

Topic	What We Found			What It Means
Concerns about Safety	One out of five Riders state that they avoid riding the bus or streetcar due to concerns about personal safety. This percentage has decreased significantly from 2012 when this question was first asked.	2012	2013	2014
		Avoid Riding Due to Concerns about Safety		
		23%	22%	20% ▼
		<i>Significant increase (▲) or (▼) from baseline (2012)</i>		
Attitudes toward Metro's Efforts to Improve Safety	The extent to which Riders strongly agree that Metro provides a safe and secure transportation environment and is proactive in its efforts to improve safety and security increased significantly. While the percentage who strongly agree that they feel safer riding now than a year ago decreased, the percentage who disagree decreased steadily—from 36% in 2012 to 34% in 2013 to 29% in 2014.	% Strongly Agree		
		2012	2013	2014
		Provides a Safe and Secure Environment		
		42%	35% ▼	49% ▲
		Is Proactive in Efforts to Improve Safety		
		27%	26%	33% ▲
		Feel Safer Riding Now than a Year Ago		
		37%	42% ▲	38% ▼
		<i>Significant increase (▲) or (▼) from previous year</i>		
Safety Using Public Transit in Downtown Seattle	Riders who use Metro in downtown Seattle are increasingly likely to strongly agree that it is safe to use transit during the daytime and when it is dark. In addition, far fewer Riders state that it is not safe.	Safe to Use Transit in Downtown Seattle		
			2013	2014
		% Strongly Agree		
		During the Day	61%	73% ▲
			% Strongly Agree	
			16%	28% ▲
		When It Is Dark	% Disagree	
			38%	25% ▼
		<i>Significant increase (▲) or (▼) from previous year</i>		

IMPACT OF SERVICE CHANGE

Topic	What We Found			What It Means	
Impact on Ridership	<p>The majority of Riders were not impacted by the service change.</p> <p>Six percent of respondents contacted who were Riders immediately prior to or during the survey data collection period indicated that they were impacted and as a result of these service changes stopped riding. Three out of five Lost Riders now drive alone for the primary trip they formerly took on Metro.</p>	Impact of Service Change on Ridership		<p>While these figures are generally positive, the impact of significant changes in service on ridership, customer goodwill, and travel behaviors should not be underestimated.</p>	
		Current Riders: No Impact	Current Riders: Impacted		Lost Riders
		72%	22%		6%
Impact on Overall Satisfaction with / Perceptions of Metro	<p>The service change had a definitive impact on Riders’—both Current and Lost Riders’—overall satisfaction with Metro.</p> <p>Other key measures were also significantly impacted.</p> <p>It is also clear that the service change negatively impacted Riders’ expectations and perceptions of Metro as shown in the table.</p> <p>Of note is the increase in the extent to which Impacted Riders disagree that Metro is innovative.</p>	Current Riders: No Impact	Current Riders: Impacted	Lost Riders	<p>While Metro’s overall satisfaction rating among Current Riders increased in 2014, the lower satisfaction ratings among those impacted by the service change would indicate that the increase in overall satisfaction would have been greater if the service changes did not occur.</p> <p>It is clear also that Metro has lost customer goodwill, which can be difficult to rebuild.</p>
		Overall Satisfaction: % Satisfied			
		93%	79%▼	45%▼	
		Expectations: % Positive			
		74%	55%▼	45%▼	
		Advocacy: % Strongly Agree			
		59%	49%▼	n.a.	
		Trust: % Strongly Agree			
		49%	39%▼	32%▼	
		High Service Standards: % Strongly Agree			
		39%	28%▼	24%▼	
		Is Innovative: % Disagree			
		23%	38%▲	48%▲	

Topic	What We Found			What It Means																											
Impact on Satisfaction with Service Dimensions and Elements of Service	<p>In addition to the impact on overall satisfaction, Current Riders impacted by the service change are less satisfied with specific aspects of service. In particular, they are less satisfied with:</p> <ul style="list-style-type: none">Overall Level of Service, notably Frequency of Service and Travel TimeComfort and Cleanliness Onboard, notably Availability of Seating and Ease of Loading and Unloading	<table><tr><td></td><td>Current Riders: No Impact</td><td>Current Riders: Impacted</td></tr><tr><td colspan="3">% Satisfied (Very and Somewhat) Level of Service</td></tr><tr><td>Overall Satisfaction</td><td>83%▲</td><td>64%▼</td></tr><tr><td>Frequency of Service</td><td>83%▲</td><td>56%▼</td></tr><tr><td>Travel Time</td><td>84%▲</td><td>65%▼</td></tr><tr><td colspan="3">Comfort / Cleanliness Onboard</td></tr><tr><td>Overall Satisfaction</td><td>80%▲</td><td>60%▼</td></tr><tr><td>Availability of Seating</td><td>84%▲</td><td>56%▼</td></tr><tr><td>Ease of Loading and Unloading</td><td>83%▲</td><td>58%▼</td></tr></table>			Current Riders: No Impact	Current Riders: Impacted	% Satisfied (Very and Somewhat) Level of Service			Overall Satisfaction	83%▲	64%▼	Frequency of Service	83%▲	56%▼	Travel Time	84%▲	65%▼	Comfort / Cleanliness Onboard			Overall Satisfaction	80%▲	60%▼	Availability of Seating	84%▲	56%▼	Ease of Loading and Unloading	83%▲	58%▼	<p>As noted in the service quality discussions, Level of Service is the single most important service dimension and these two elements (Frequency of Service and Travel Time) are also important elements of service. Improvements in these two areas will positively influence all Riders.</p> <p>Comfort and Cleanliness Onboard is also an important service dimension. While Availability of Seating is as important as Overcrowding, it is clear that in the case of Impacted Riders, Availability of Seating is a concern as is Ease of Loading and Unloading (due to crowding).</p>
			Current Riders: No Impact	Current Riders: Impacted																											
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▲ / ▼ indicates a statistically difference between respondent groups																															
Impact on Goodwill and Customer Focus Indices	<p>As discussed earlier, two indices were developed to summarize (1) the extent to which Riders have goodwill towards Metro and (2) the extent to which Riders feel Metro provides value and is focused on its customers.</p> <p>The service changes had a clear and negative impact on both goodwill and the extent to which Impacted Current and Lost Riders feel that Metro provides value and is focused on its customers.</p>	<table><tr><td></td><td>Current Riders: No Impact</td><td>Current Riders: Impacted</td><td>Lost Riders</td></tr><tr><td colspan="4">Goodwill Index</td></tr><tr><td>3.98</td><td>3.63▼</td><td>3.40▼</td><td></td></tr><tr><td colspan="4">Value / Customer Focus Index</td></tr><tr><td>3.26</td><td>3.06▼</td><td>2.52▼▼</td><td></td></tr></table>			Current Riders: No Impact	Current Riders: Impacted	Lost Riders	Goodwill Index				3.98	3.63▼	3.40▼		Value / Customer Focus Index				3.26	3.06▼	2.52▼▼		<p>Metro will have to work to rebuild lost goodwill—notably the extent to which Riders feel they can trust Metro’s decisions and the direction the agency is taking.</p> <p>In addition, efforts will be needed to convince the public that Metro has consistently high standards for the service that it provides.</p>							
			Current Riders: No Impact	Current Riders: Impacted	Lost Riders																										
		Goodwill Index																													
		3.98	3.63▼	3.40▼																											
		Value / Customer Focus Index																													
		3.26	3.06▼	2.52▼▼																											
Indices are based on a 5-point scale where “1” represents “very low” and “5” represents “very high” goodwill or value and customer focus																															
▲ / ▼ indicates a statistically difference between respondent groups																															

Topic	What We Found		What It Means
Satisfaction with Information about Service Changes	<p>Current Riders had mixed opinions about how effectively Metro provided information about the September 2014 service change—overall 62% were satisfied while 34% were dissatisfied.</p> <p>They were least satisfied with the extent to which they were able to provide public input.</p>	% AGREE	<p>While Metro was clearly effective in providing timely information Riders needed to adapt to the service changes, the perceived concerns about listening to customers could be a reason behind the lower satisfaction and perception scores among Impacted Riders.</p>
		TIMELINESS OF NOTIFICATIONS	
		76%	
		PROVIDING NEEDED INFORMATION	
		70%	
		PROVIDING REASONS FOR CHANGES	
Likelihood of Future Ridership if Service Is Restored	<p>Despite the negative impact the service changes had on overall satisfaction and perceptions of Metro, the majority of Lost Riders would ride Metro again if service is restored.</p>	% OF LOST RIDERS	<p>Restoration of existing or new services that meet potential Rider expectations is likely to meet with success.</p>
		GETTING PUBLIC INPUT	
		53%	
		KNOWING WHO TO CONTACT	
		47%	
		VERY LIKELY	
		SOMEWHAT LIKELY	
		53%	
		NEITHER LIKELY NOR UNLIKELY	
		28%	
		NOT LIKELY	
		10%	
		9%	