



MARKET
& OPINION
RESEARCH
SERVICES



2014 Customer Satisfaction Survey

Intercept survey of
Sound Transit riders

EMC #14-5447

Methodology

- ▶ These results are the ninth set of measurements for Sound Transit customer satisfaction. Where possible, results are compared to previous surveys conducted in 2005 – 2013.
- ▶ A total of 1,323 interviews were conducted system-wide between November 12th and December 21st 2014 based on the size and frequency of routes.
- ▶ Data was then weighted to reflect actual distribution of ST's riders, based on annual ridership figures provided by Sound Transit. These figures are shown below.

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Express Bus: (n=536)	83%	79%	78%	78%	63%	56%	57%	55%	55%	54%
Tacoma Link: (n=134)	9%	7%	7%	6%	4%	4%	4%	4%	3%	3%
Souder: (n=369)	8%	14%	15%	16%	11%	12%	11%	10%	10%	10%
Central Link: (n=284)	-	-	-	-	22%	28%	29%	31%	32%	34%

Please note that due to rounding, some percentages may not add up to exactly 100%.

Key Findings

The vast majority of riders give Sound Transit an overall rating of B or higher with nearly half (46%) giving the agency an A grade. Average 2014 ST grades continue to stay in-line with previous years' GPAs while individual service grades have generally stayed consistent over time.

- *Express Bus riders ratings remain consistent, with most grading Sound Transit at a B or higher and two-fifths (41%) giving an A grade.*
- *Central Link riders continue to be pleased with Sound Transit; a majority (54%) grade the agency an A.*
- *The proportion of positive ratings remain consistent among Sounder riders, though intensity has diminished a bit over the last couple of years (51 → 43% A grade).*
- *Service ratings have grown increasingly similar between North and South Sounder riders over the last couple of years.*
- *Sound Transit continues to enjoy some of the highest ratings among transit agencies.*
- *As in previous years, new riders give ST a slightly higher grade than more established riders, although on average both groups give ST a B rating.*

Key Findings

Riders continue to cite service reliability and convenience as ST's biggest strengths while noting on-time improvements, overcrowding and service expansion as possible improvements

- *Service reliability (32%) is the top reason for giving Sound Transit an A grade or higher. Convenience (14%) is the next-most popular reason.*
- *Late arrivals (23%), overcrowding (12%) and needing more service (11%) are the top reasons for giving ST a C or lower.*

The mix of performance-related and system/expansion-related suggestions vary by service. In addition to on-time performance, Improving arrivals communication, PA sound system and expanding the schedule are common suggestions.

- *Improving on-time performance (10-11% mentioned) is a prevalent suggestion by Express bus and Sounder riders*
- *Improving arrival time communication (11-15%) is another frequent suggestion among Sounder and Link riders.*
- *Bus and Sounder riders also suggest improving the PA sound system.*
- *Expanding the schedule for existing routes is the top system/expansion-related suggestion among Express bus and Sounder riders.*

Key Findings

System-wide satisfaction with travel time and on-time performance are on-par with previous with the majority of riders giving an ST an A for these benchmarks. Both ratings are lowest among Express bus riders.

- *Among Express bus riders, travel time satisfaction remained consistent from 2013 to 2014 but on-time satisfaction rating has declined (51 → 44% A grade).*
- *Satisfaction with travel time and on-time performance of Central Link and Sounder remain consistent, with a majority riders rating these attributes as an A.*
- *Sounder on-time performance, which has fluctuated in recent years, has rebounded from last year (55 → 64% A).*
- *A majority of riders have not noticed a change in on-time performance in the past year.*
- *While a majority of Express Bus and Sounder riders haven't noticed a change in on-time performance, they are split on whether it has gotten better or worse over the last year.*
- *Riders of both Link services believe on-time-performance is at least the same, if not better than last year.*

Key Findings

Aside from lower on-time performance ratings, cleanliness ratings have also dropped among Express bus and Sounder riders. Other service attribute ratings have remained consistent with previous years.

- *While most ST riders rate service cleanliness as at least a B, fewer Express bus (-12%) and Sounder (-13%) riders gave cleanliness an A rating than last year.*
- *Satisfaction with Express Bus driver demeanor and appearance remains high (68% or higher A grades); consistent with previous years. Driver courtesy ratings do not vary significantly between ethnicity groups.*
- *Satisfaction with Sounder and Link operators remains high (82%+ A grade) and consistent with years past.*
- *Most Sounder riders (74%) grade Station Agents at an A, consistent with previous years.*
- *An increasing number of Link riders have never seen or do not recall seeing a fare inspector. The portion of riders who report seeing them on at least some trips is gradually declining.*

Key Findings

Safety on-board and at stops/stations have stayed steady with previous years.

- *Safety ratings among Central Link riders – both on-board and at stations – remain consistent with previous years*
- *Overwhelmingly, Sounder riders feel safe while waiting for the train as well as on-board.*
- *While Express Bus riders generally have few concerns while waiting for the bus, there is a slight decline in those who feel very safe onboard.*
- *Very few ST riders on any service feel their vehicle is insecure at a Park and Ride. A majority of Tacoma Link and Express Bus riders don't even use park and rides.*
- *Riders feel safe leaving their cars at most park and rides. Reported P&R usage is highest among Pierce and Snohomish riders while most riders in South and North King do not use a park and ride.*

Key Findings

A majority of riders across all services get information about schedules online.

- *Most riders (85%) own smart phones. A majority (55%) would be likely to use their smart phone to purchase a ticket if it was an option.*
- *Sounder riders, Express Bus riders, younger riders, new riders, and choice riders are more likely to use their cell phones to access schedules.*
- *After major shifts in ST and One Bus Away app shares over the last few years, the usage shares of the major transit apps have been flat in 2014.*
- *Most riders members (78%) regularly use a smart phone while on a ST service.*
- *While all technological amenities appeal to riders members, getting real-time updates and wi-fi service at stops and stations are clear favorites. On-board wi-fi access is less of a priority.*
- *Less than a quarter of all riders subscribe to Rider Alerts. For those who do subscribe, they overwhelmingly receive the alerts via text messages or emails.*

Key Findings

Most customers – particularly Sounder riders -- use ST as a matter of preference. A quarter of Express bus riders and third of Central Link riders ride the service as a matter of necessity.

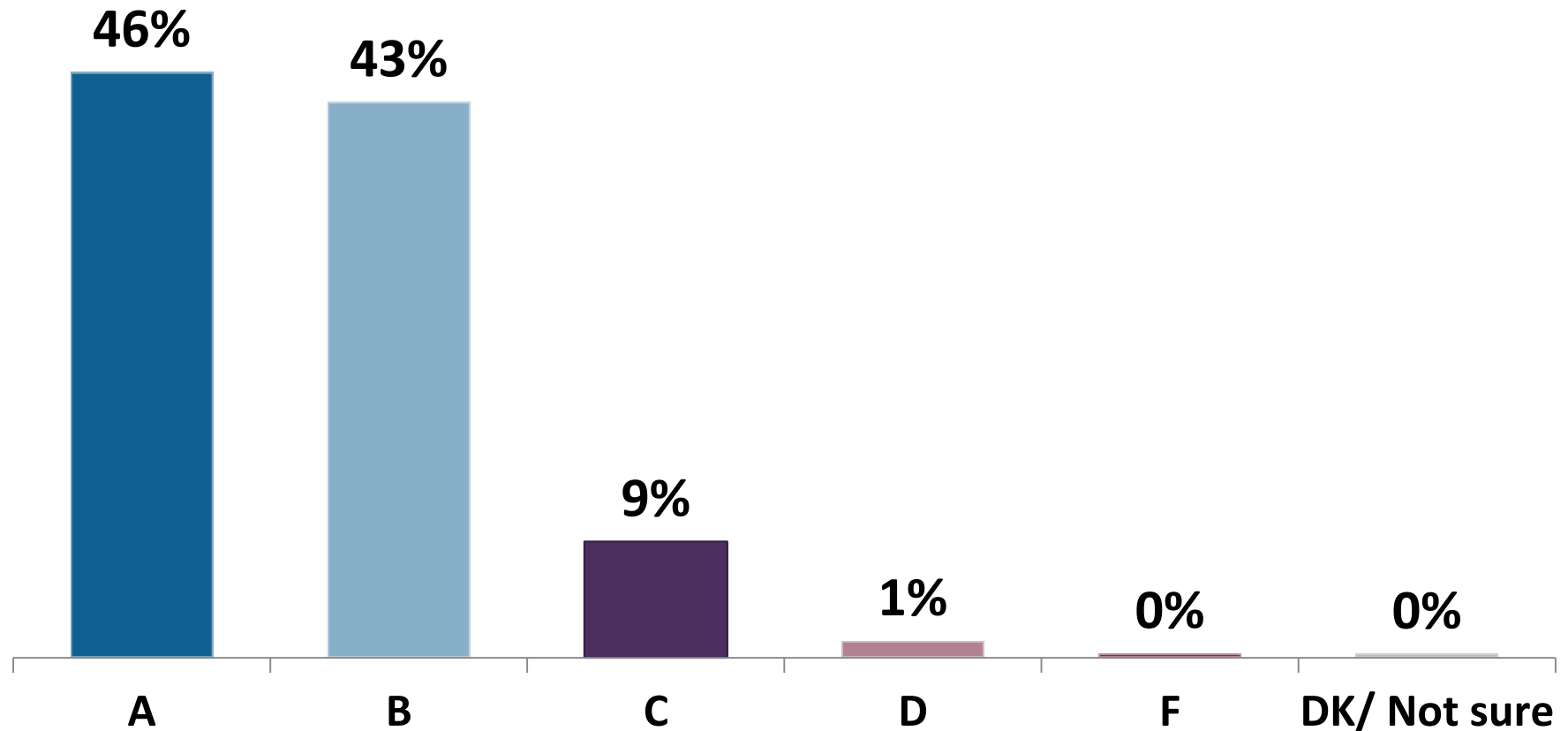
- *Virtually all ST choice riders plan to continue to ride ST themselves (99%+) and would recommend the service to a family member or friend (97%+).*
- *Most choice riders recall seeing ST advertising onboard. A third can't recall seeing anything recently.*
- *For the most part, choice riders' recollection of ST advertising is consistent with years past. However, a few new ideas emerged in 2014. A handful of riders mentioned hearing about light rail expansion.*
- *Perceptions of advertising impact remains consistent with previous years. The majority think advertising plays a minor role in others' decisions to begin riding transit.*
- *More frequent service and expanded parking make up the largest improvement suggestions across all services. Requests for these are drastically higher among Sounder riders, where a strong majority would like more service (65%) and more park & ride spaces (50%).*



Agency & Service Grades

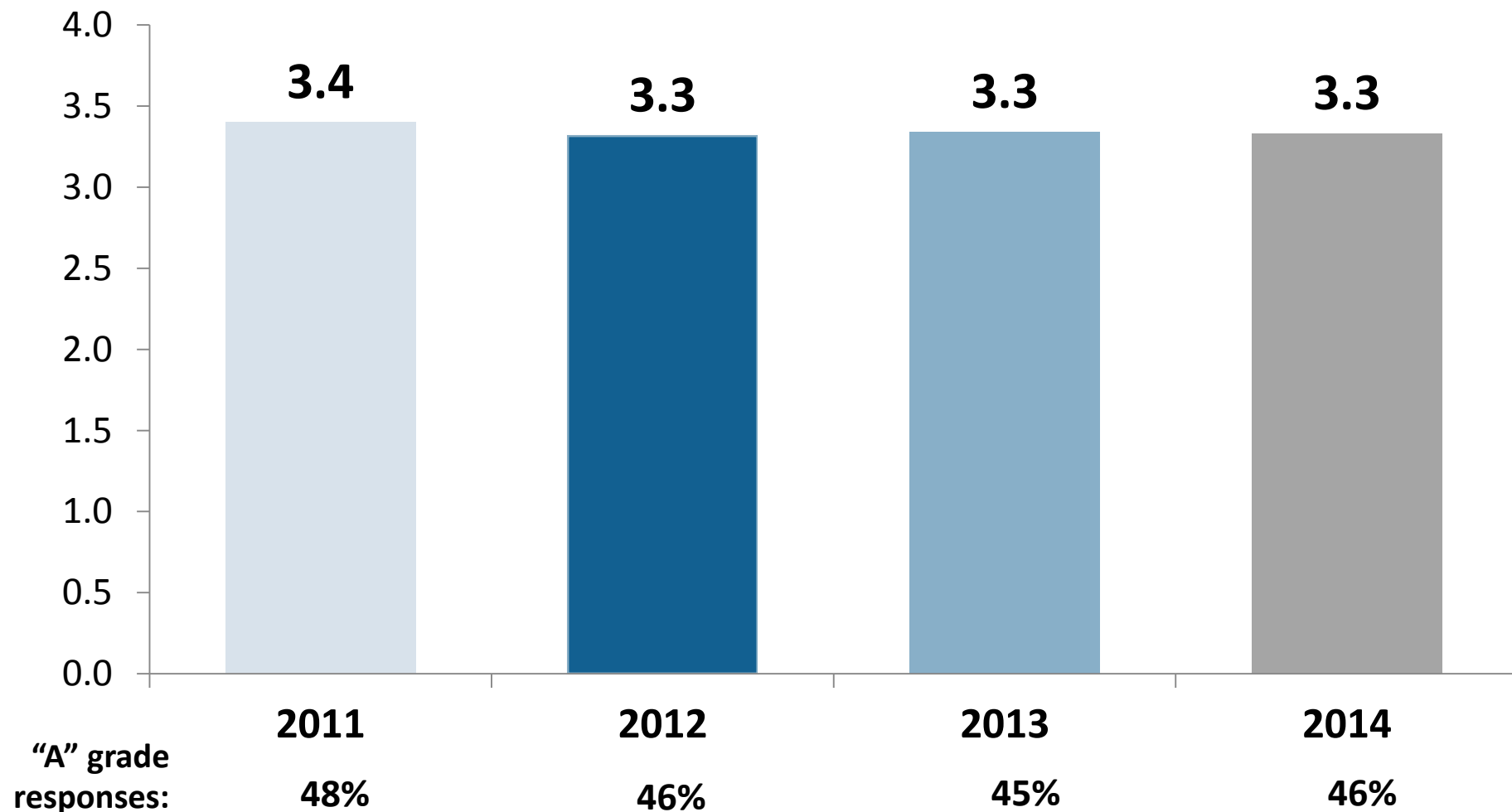
2014 Sound Transit Grade Breakdown

The vast majority of riders give Sound Transit an overall rating of B or higher with nearly half (46%) giving the agency an A grade.



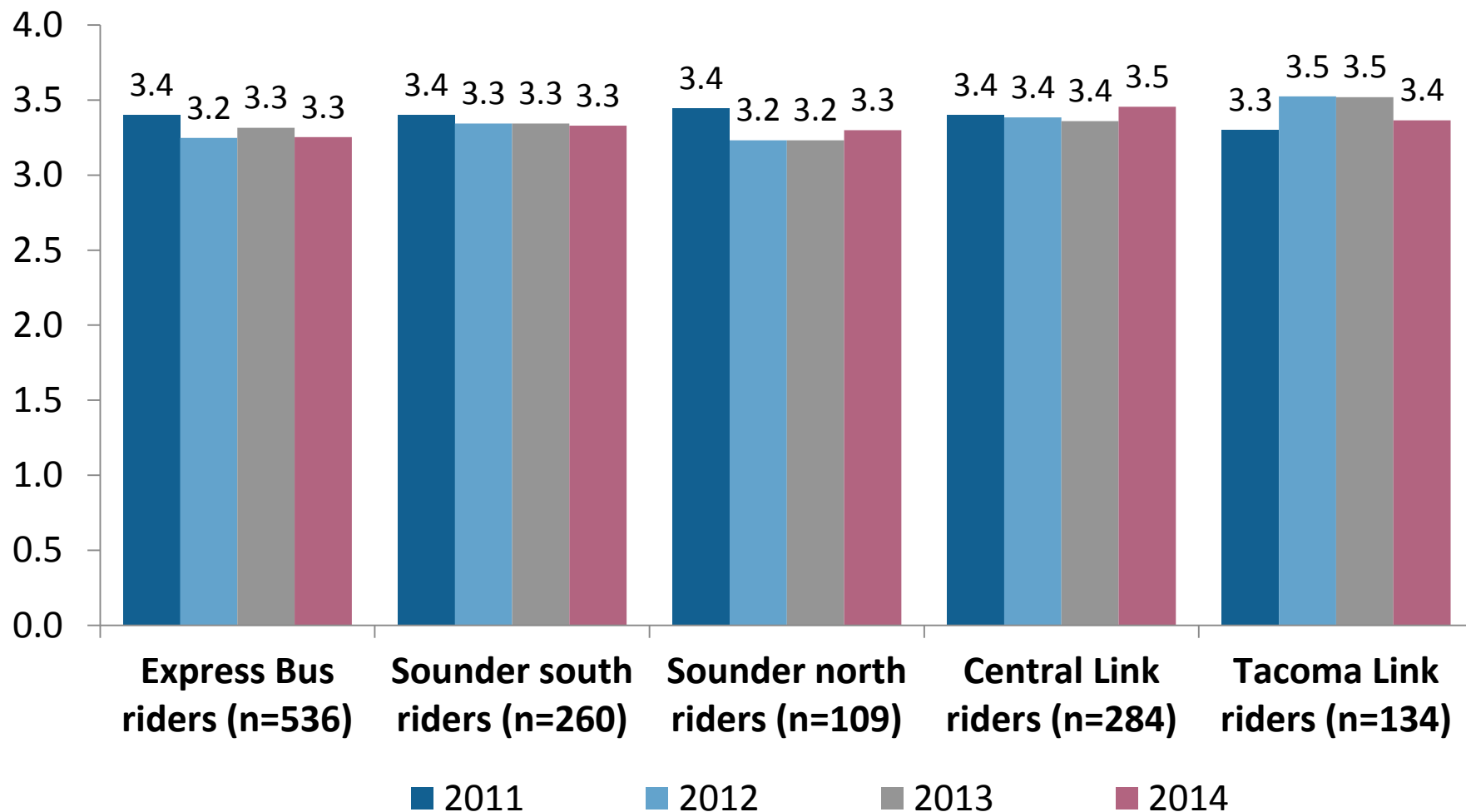
Sound Transit Grade by Year

Average 2014 ST grades continue to stay in-line with previous years' GPAs.



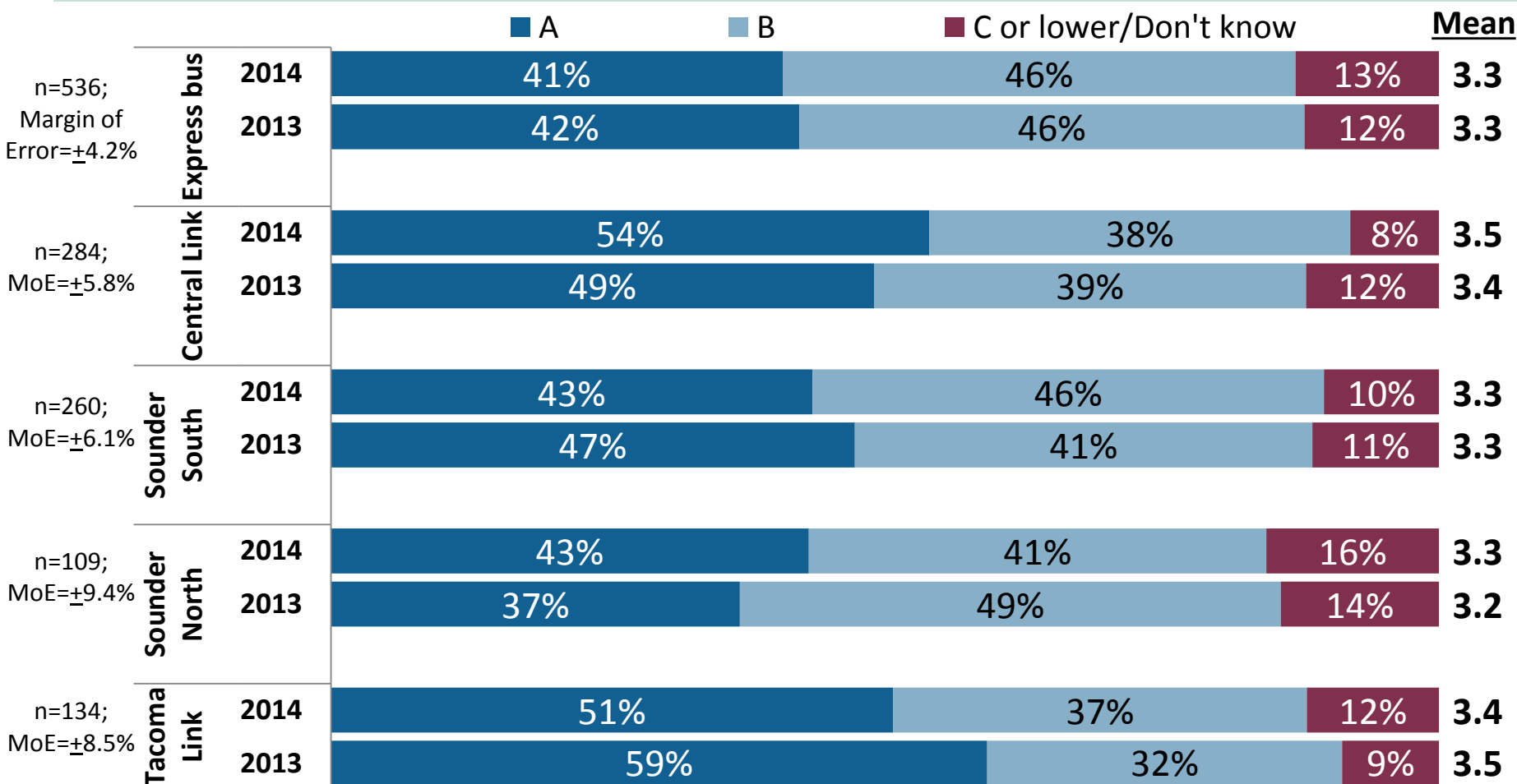
Sound Transit Grade by Service, by Year

Grades by service have generally been consistent over time.



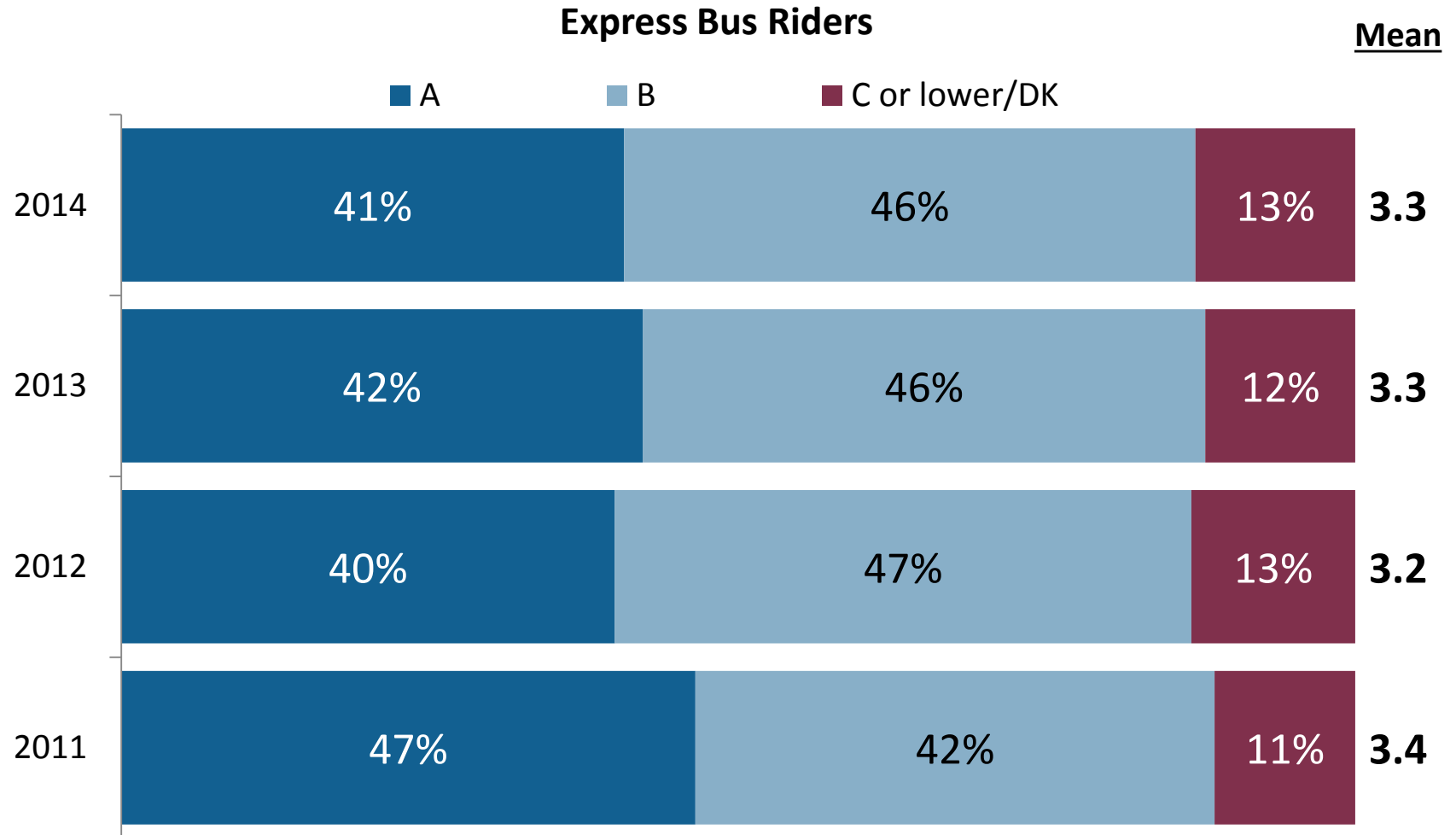
Sound Transit Grade – by Service

Express Bus riders ratings remain consistent, with most grading Sound Transit at a B or higher. Central Link riders continue to be pleased with Sound Transit; a majority (54%) grade the agency an A. The proportion of positive ratings remain consistent among Sounder South riders, though intensity has diminished a bit over the last couple of years (47→43% A grade).



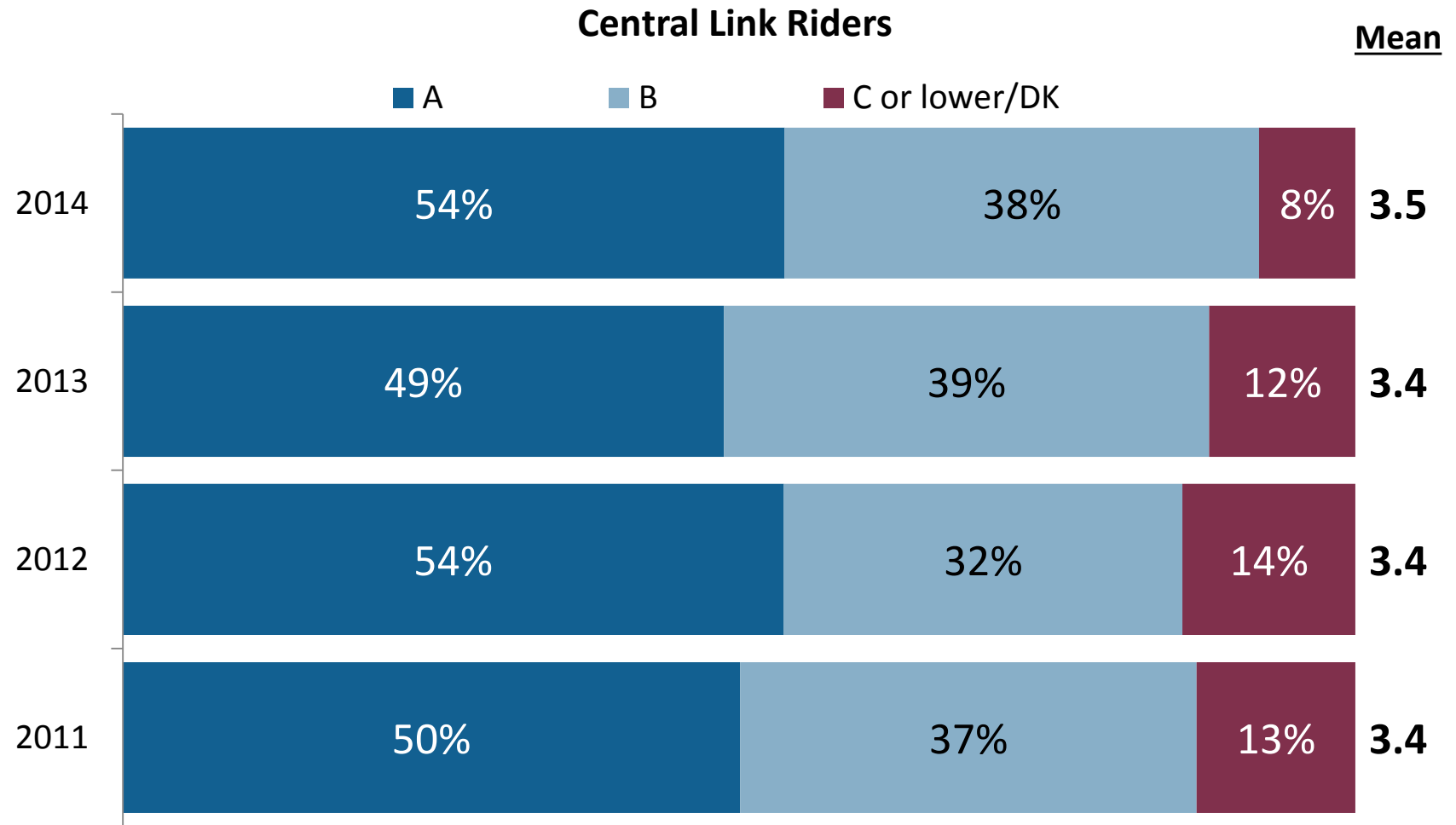
Sound Transit Grade – by Express Bus Riders

Express Bus riders ratings remain consistent, with most grading Sound Transit at a B or higher.



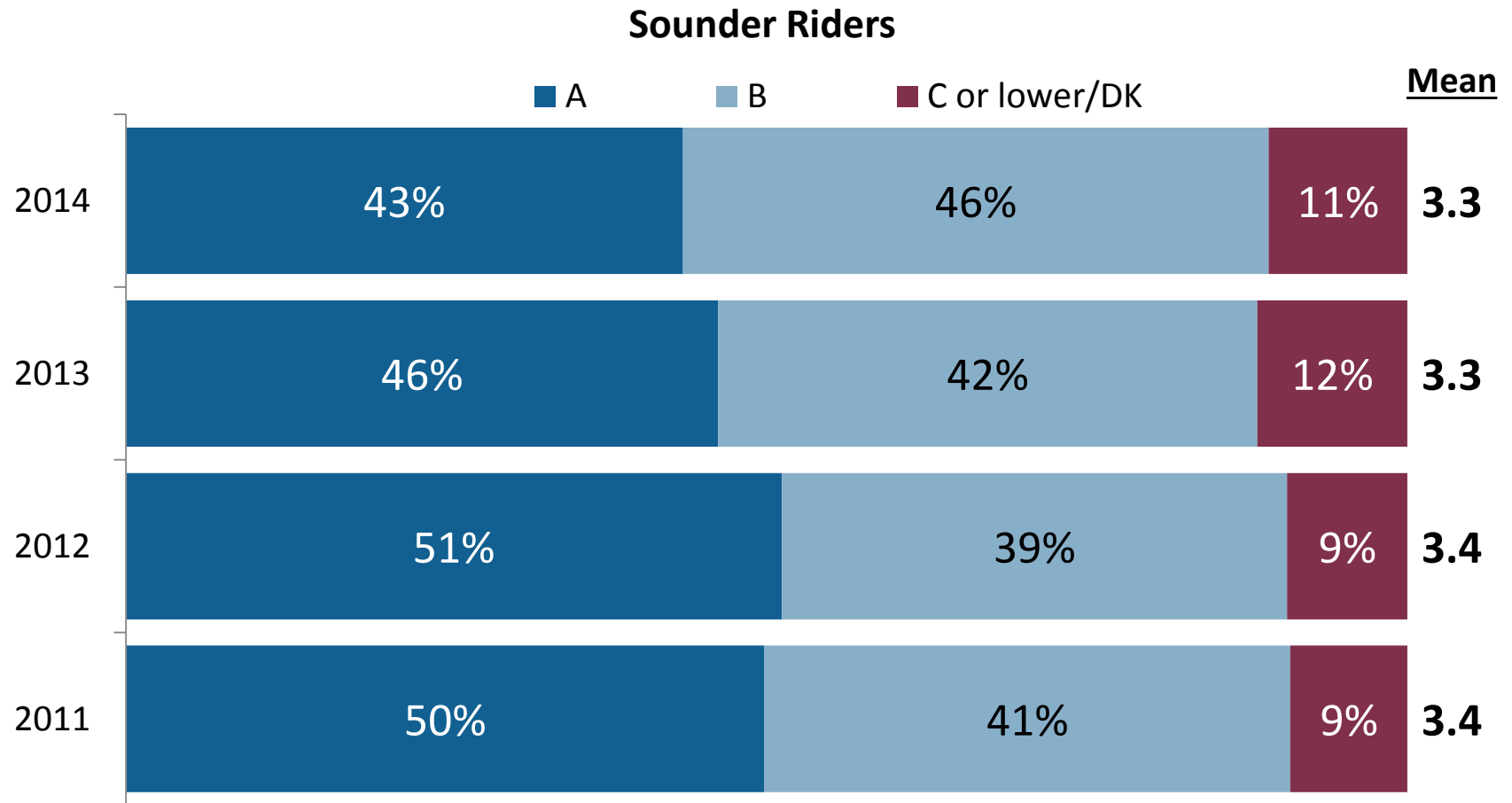
Sound Transit Grade – by Central Link Riders

Central Link riders continue to be pleased with Sound Transit; a majority (54%) grade the agency an A.



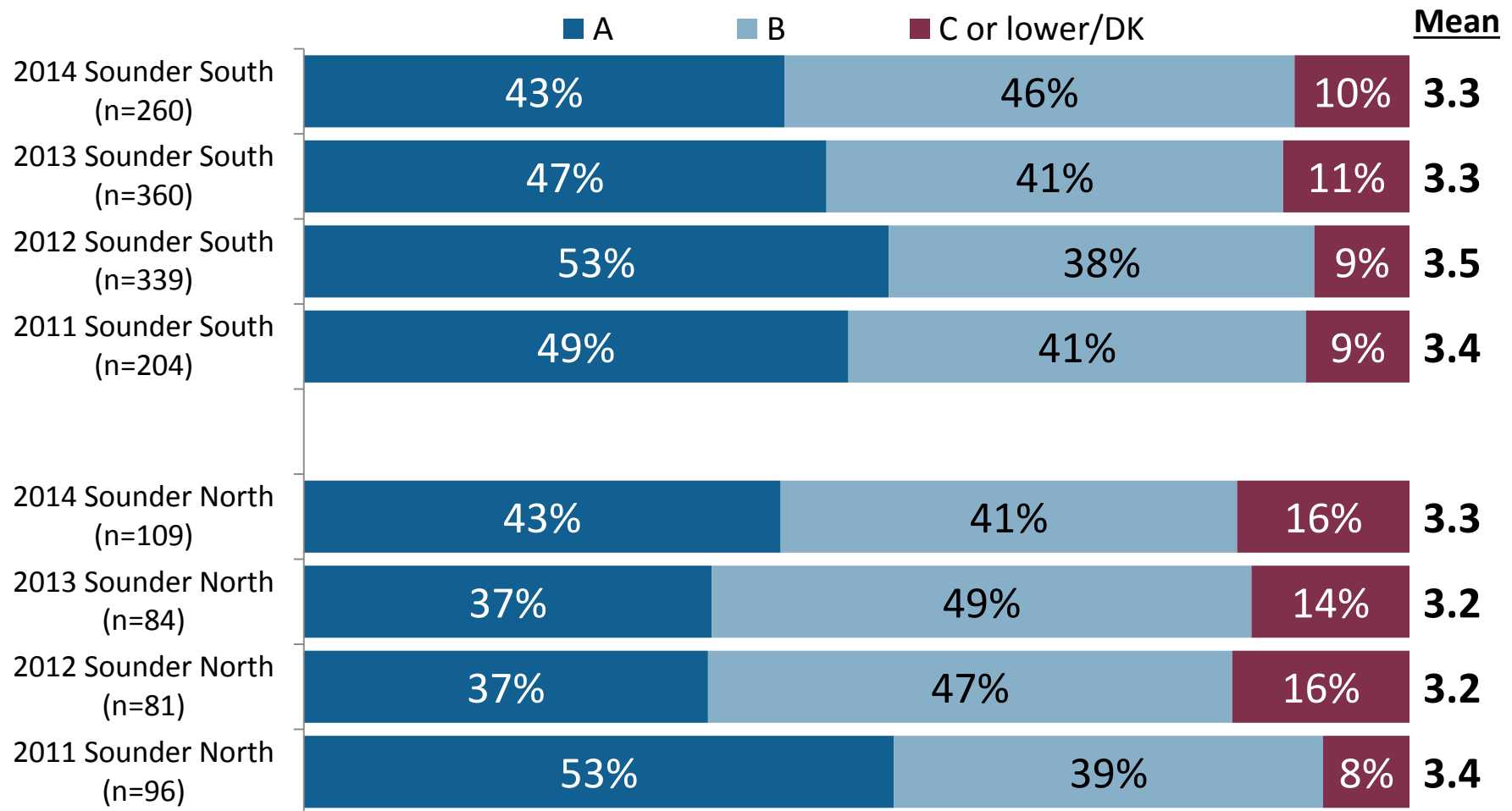
Sound Transit Grade – by Sounder Riders

The proportion of positive ratings remain consistent among Sounder riders, though intensity has diminished a bit over the last couple of years (51 → 43% A grade).



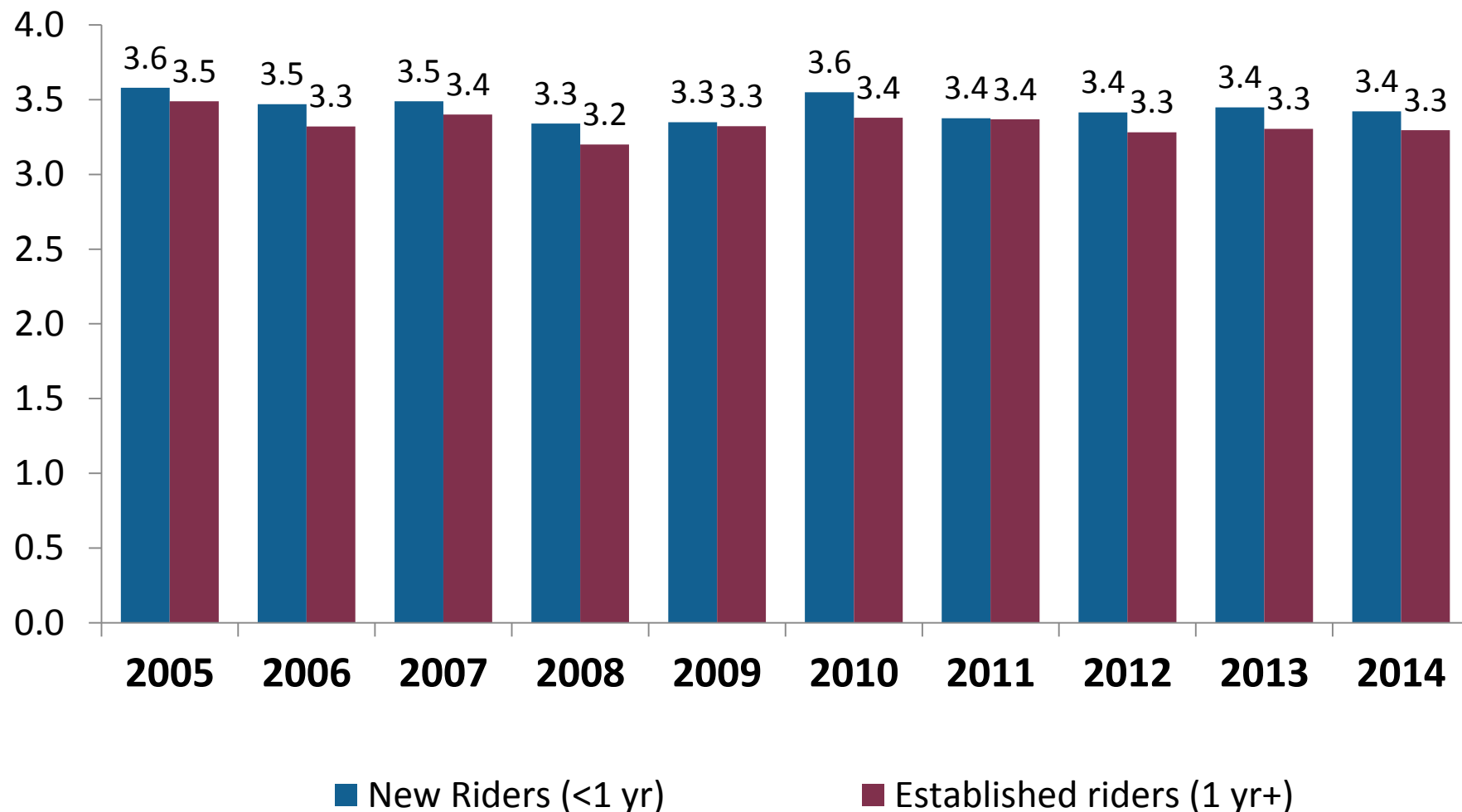
ST Grade – Sounder North & South, Year by Year

ST ratings have grown increasingly similar between North and South riders over the last couple of years.



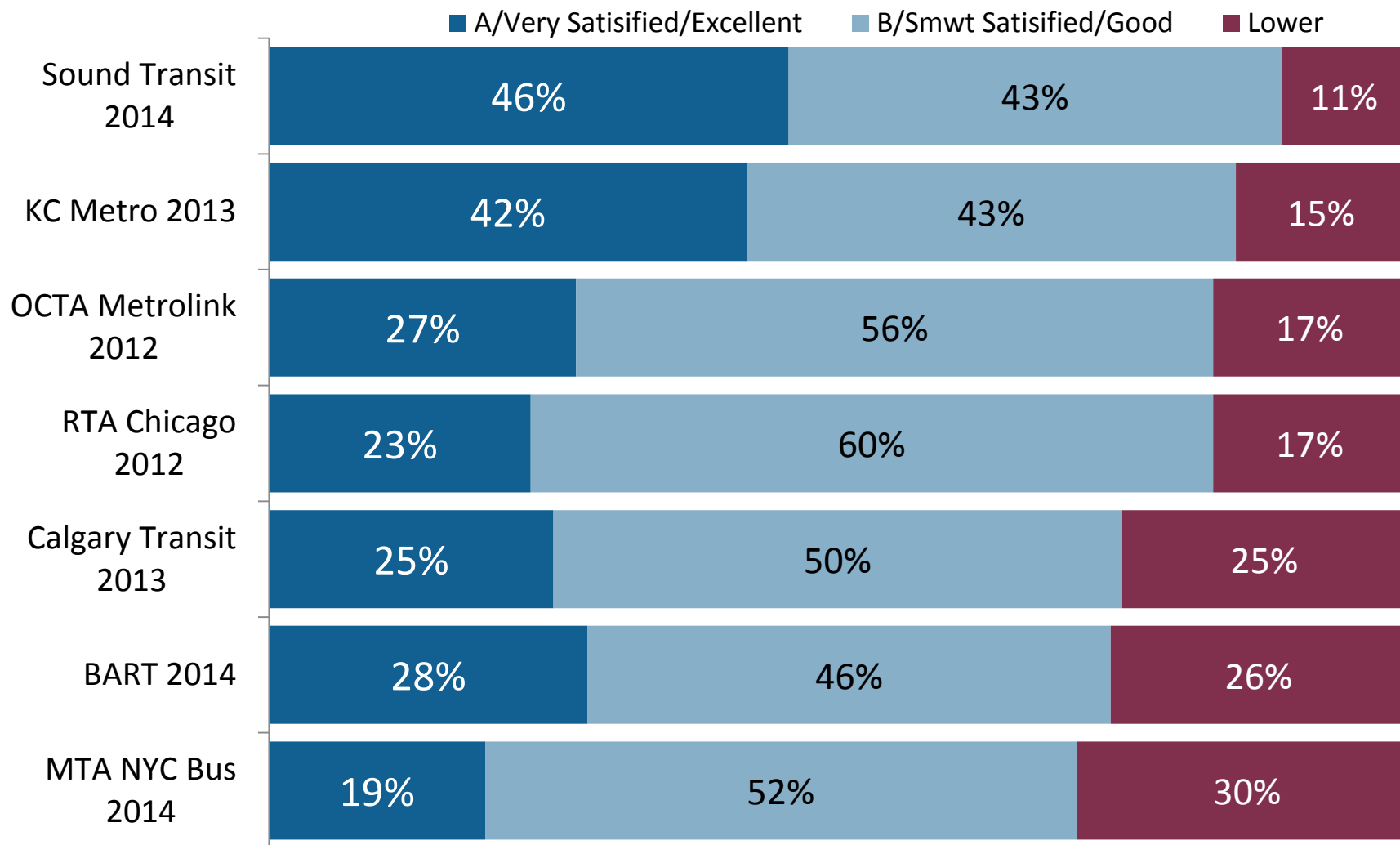
ST Grade by Length of Ridership

As in previous years, new riders give ST a slightly higher grade than more established riders, although on average both groups give ST a B rating.



Benchmarking Against Other Agencies

Sound Transit continues to enjoy some of the highest ratings among transit agencies.



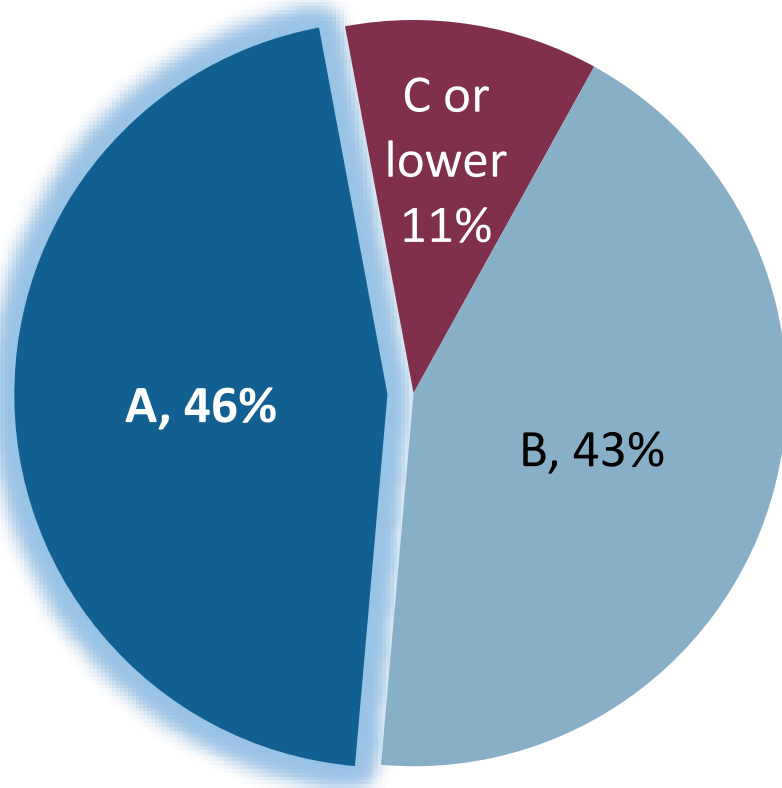


Top-of-Mind Improvements

Grade in Focus: A Grade

Service reliability (32%) is the top reason for giving Sound Transit an A grade or higher. Convenience (14%) is the next-most popular reason.

Q6. Sound Transit Grade



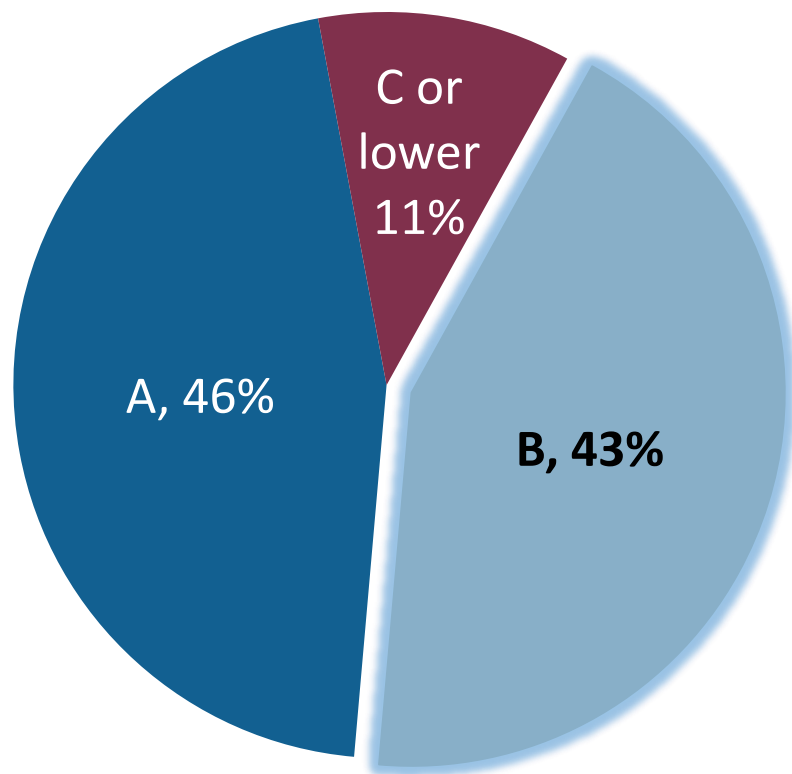
Q7. What are your reasons for that grade?
(multiple responses; first response shown)

Q7. Top Reasons for A Grade	%
Reliable/ Prompt/ Runs often	32%
General positives (Nice/ Fun/ No complaints)	18%
Convenient	14%
Clean/ Nice	8%
Fast/ Avoids traffic	8%
Comfortable/ Relaxing	5%
Friendly/ helpful operators & personnel	3%
Good coverage/ Goes to destination	3%
Affordable fare/ Free parking	2%
Safe/ Secure	1%
Other positives	3%

Grade in Focus: B Grade

Among those giving ST a B grade, reliability (17%) tops the list of positive mentions.

Q6. Sound Transit Grade



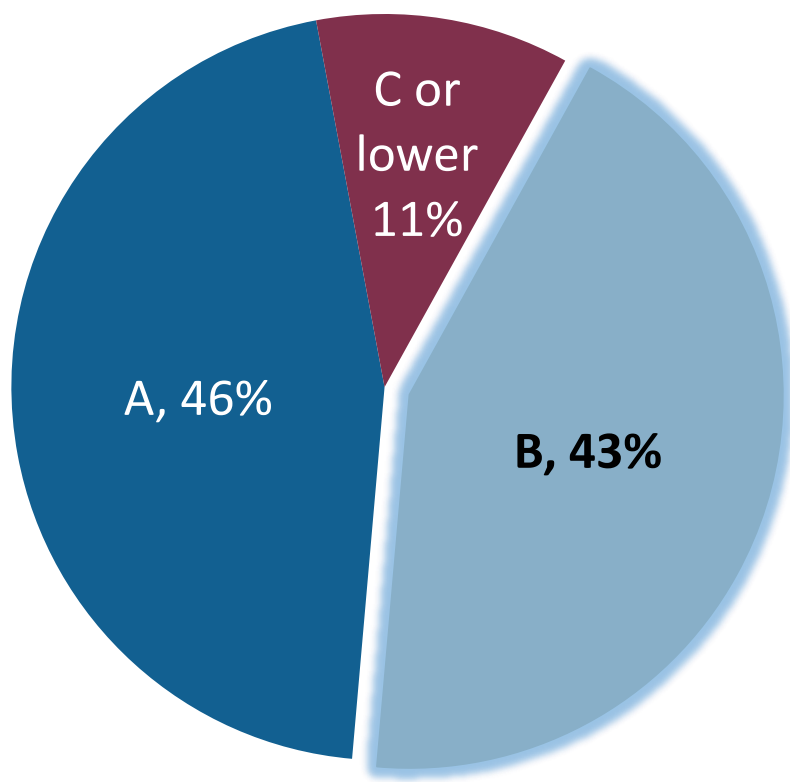
Q7. What are your reasons for that grade?
(multiple responses; first response shown)

Q7. Top Positive Reasons for B Grade	%
Reliable/ Prompt/ Runs often	17%
General positives (Nice/ Fun/ No complaints)	12%
Convenient	8%
Fast/ Avoids traffic	3%
Good coverage/ Goes to destination	2%
Clean/ Nice	2%
Comfortable/ Relaxing	1%
Friendly/ helpful operators & personnel	1%
Affordable fare/ Free parking	1%
Safe/ Secure	1%
Other positives	2%

Grade in Focus: B Grade

Late arrivals (12%) is the top negative reason for giving ST a B grade, followed by numerous expansion-contingent suggestions (more service, crowded, expand schedule).

Q6. Sound Transit Grade



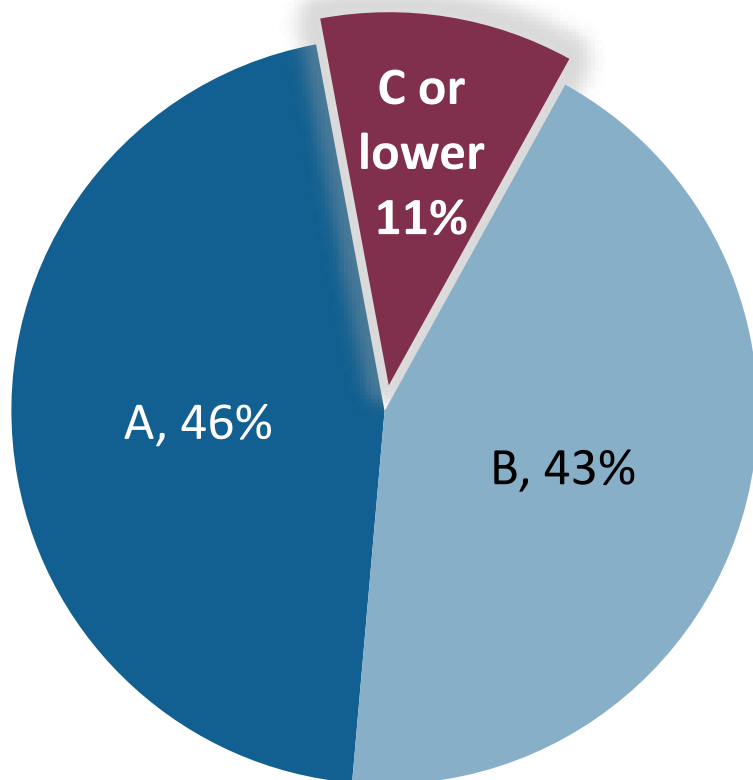
Q7. What are your reasons for that grade?
(multiple responses; first response shown)

Q7. Top Negative reasons for B Grade	%
Late at times/ Always late	12%
More service/ routes/ buses	7%
Crowded/ Larger buses/trains	7%
Improve/ Expand schedule	4%
Slow/ Too many stops/ More express	2%
Need more parking	2%
Rude drivers & personnel	1%
Other negatives	4%

Grade in Focus: C Grade

Lateness (23%), overcrowding (12%) and needing more service (11%) are the top reasons for giving ST a C or lower.

Q6. Sound Transit Grade



Q7. What are your reasons for that grade?
(multiple responses; first response shown)

Q7. Top Negative C Reasons	%
Late at times/ Always late	23%
Crowded/ Larger buses/trains	12%
More service/ routes/ buses	11%
Rude drivers & personnel	5%
Improve/ Expand schedule	4%
Need more parking	2%
Too expensive	2%
Too early/ Doesn't wait	2%
Other negatives	15%
Neutral reasons (ok/average)	7%
All other reasons	9%
Don't know/NA/First time rider	6%

Improving Grade – by Service

The mix of performance-related and system/expansion-related suggestions vary by service. On-time improvement is a prevalent suggestion by Express bus and Sounder riders while improving arrival time communication is mentioned for Sounder and Link. Bus and Sounder riders also suggest improving the PA sound system.

Top Suggestions for improvement	Exp. Bus	Sounder South	Sounder North	Central Link	Tacoma Link
Performance suggestions (flexible improvements)	30%	33%	31%	26%	25%
Be on-time/adhere to schedule/less delays	11%	11%	10%	5%	2%
Can't hear sound system/not clear	8%	5%	15%	3%	2%
Announce next time of arrival/post departure times	7%	12%	5%	11%	15%
More security	2%	3%	2%	2%	0%
Other performance suggestions (<2% mention)	3%	2%	0%	5%	6%
System Suggestions (“More” investments)	30%	40%	24%	21%	13%
Expand schedule/ Run earlier/later	16%	16%	9%	5%	4%
Fewer stops/Direct/express routes/HOV lane	4%	1%	4%	4%	1%
Overcrowding/SRO/Larger-longer buses	3%	8%	3%	3%	4%
Make snacks/beverages accessible on transit	2%	2%	1%	1%	0%
New/cleaner buses/trains	2%	8%	5%	5%	1%
More stops	2%	1%	0%	0%	2%
Bus tracker	1%	3%	1%	0%	1%
Other system suggestions (<1% mention each)	1%	0%	2%	2%	0%
All Other suggestions	11%	7%	15%	15%	14%
Nothing/ Don't know/ No answer	29%	20%	30%	38%	47%

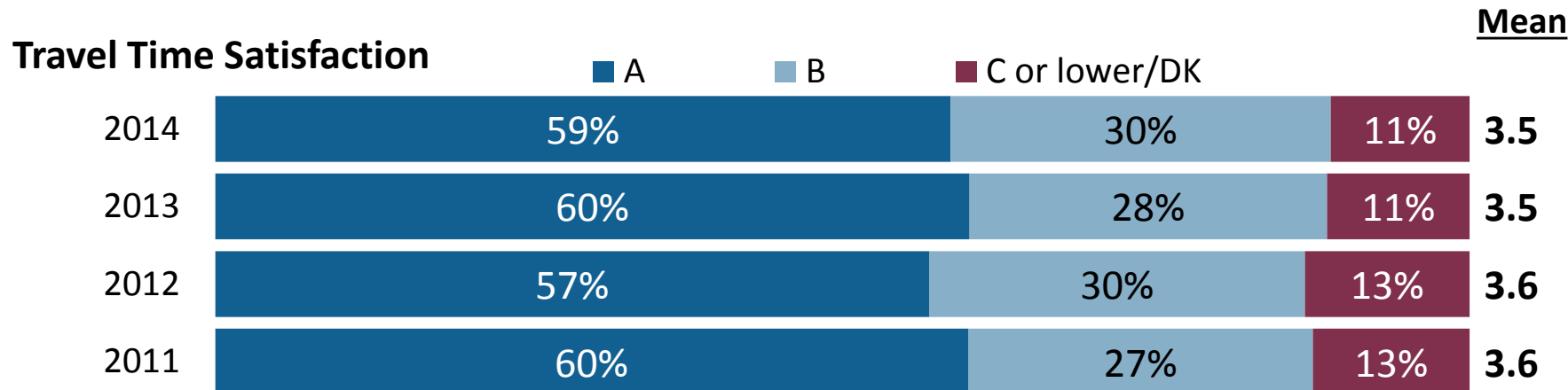
Q8. What could Sound Transit do to improve the grade you gave?
(multiple responses; **first** response shown)



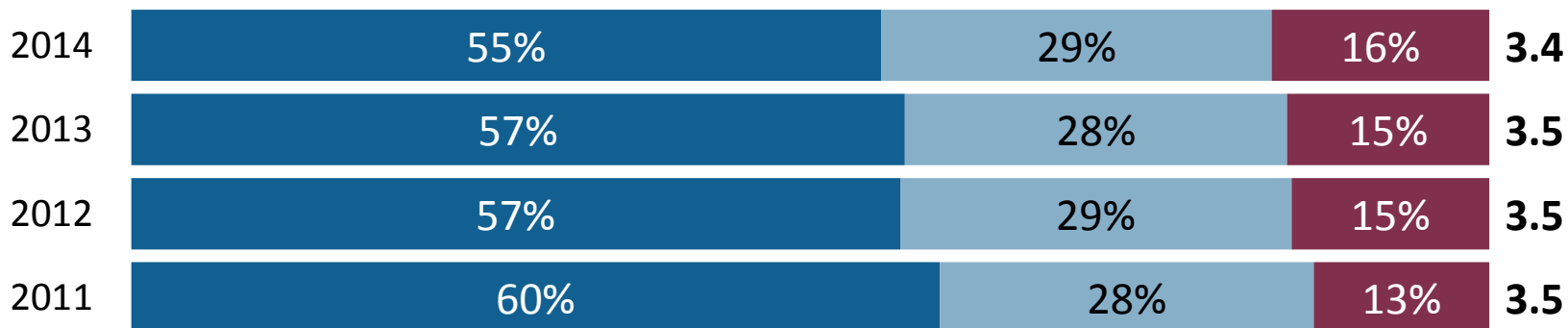
Performance Attribute Ratings and Grades

Time Satisfaction – Year-to-Year

Overall travel time ratings remain consistent with previous years, with over half of riders give these attributes an A grade. On-time performance ratings, while mostly consistent, have gradually diminished since 2011 (60 → 55% A grade).



On-Time Satisfaction



Q28. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

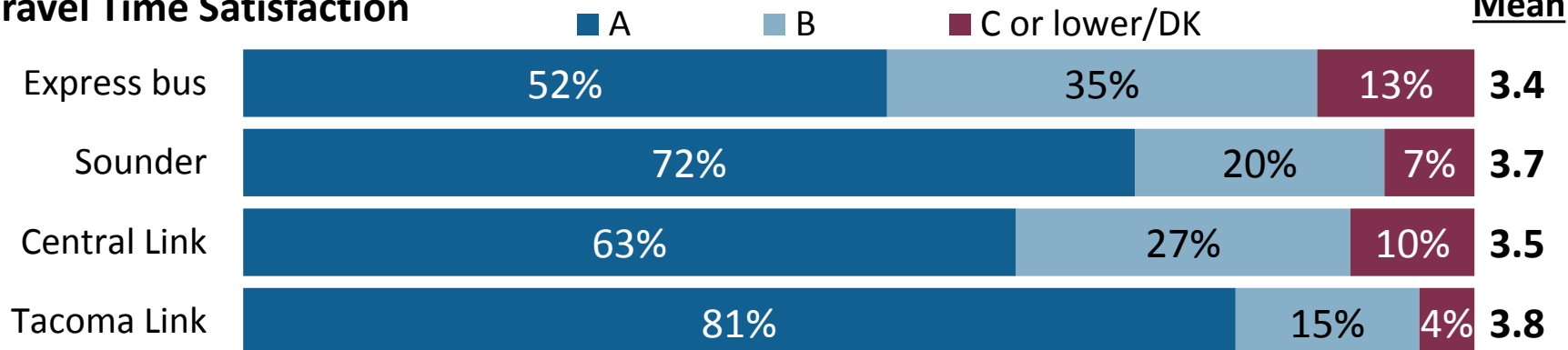
Q29. How would you grade the on-time performance of Express Bus/ LR/ Sounder?

Time Satisfaction – by Service

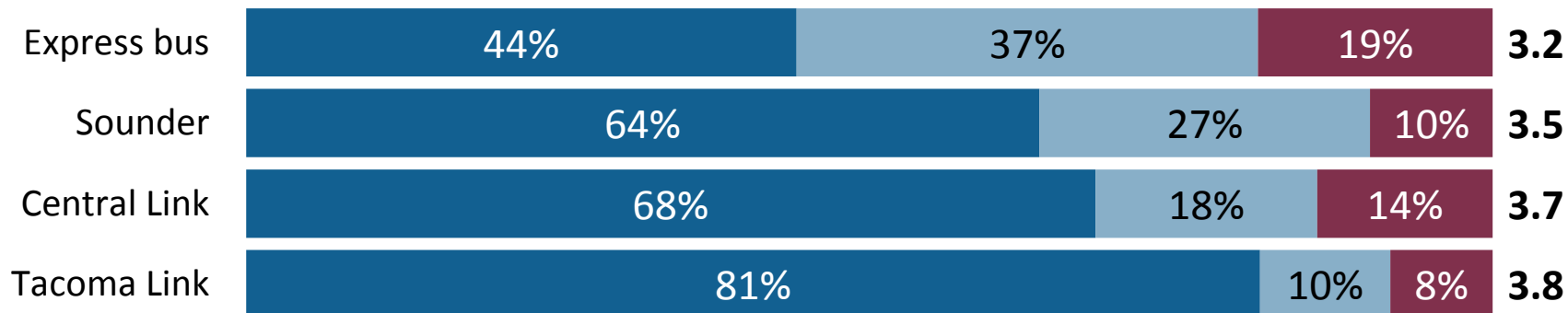
While a majority of Express bus riders (52%) give travel time an A grade, they rate on-time performance lower (44% A grade).

Ratings for both attributes are comparatively higher across ST's rail services.

Travel Time Satisfaction



On-Time Satisfaction

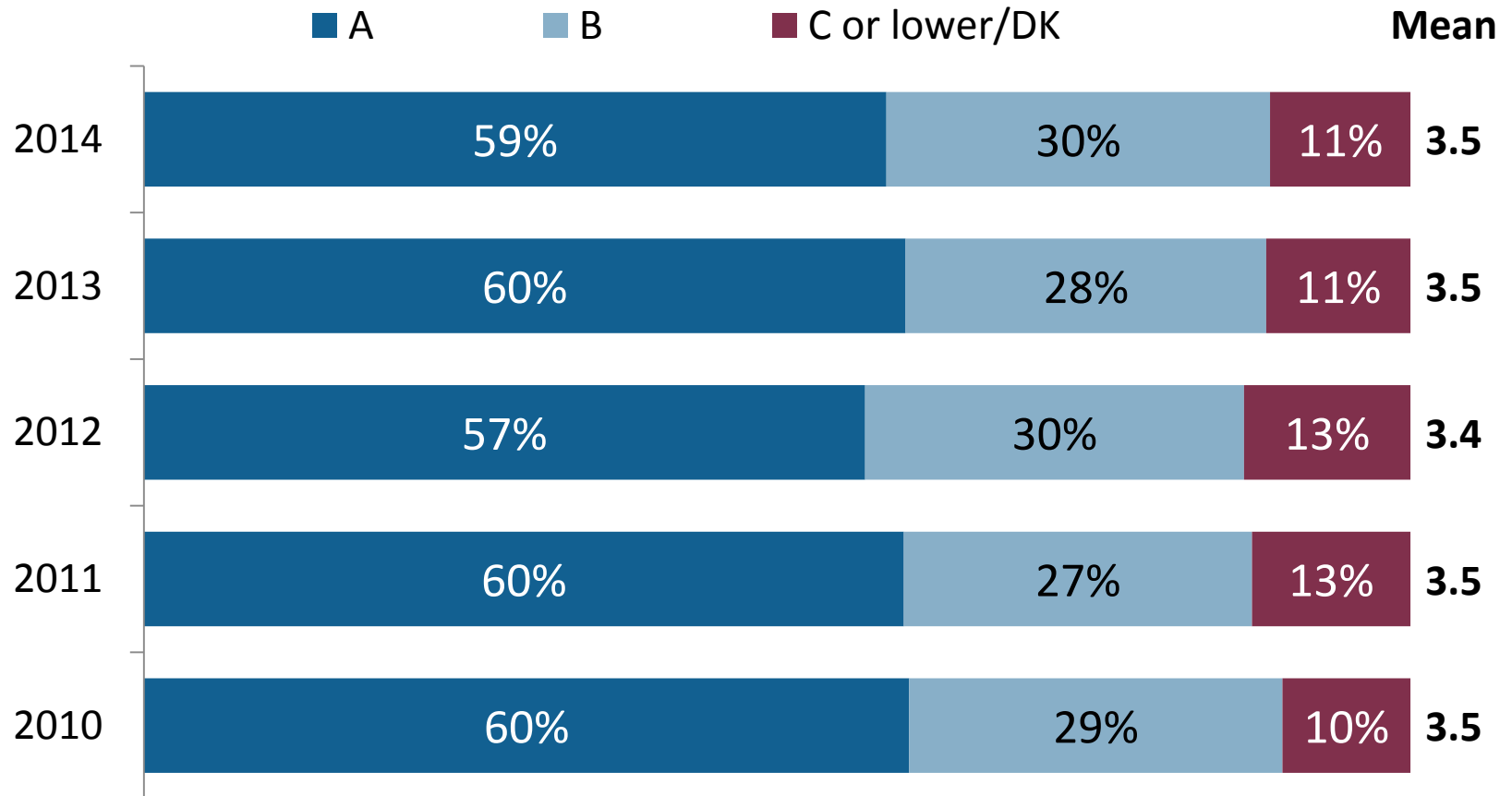


Q28. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

Q29. How would you grade the on-time performance of Express Bus/ LR/ Sounder?

Satisfaction with Travel Time – Year-to-Year

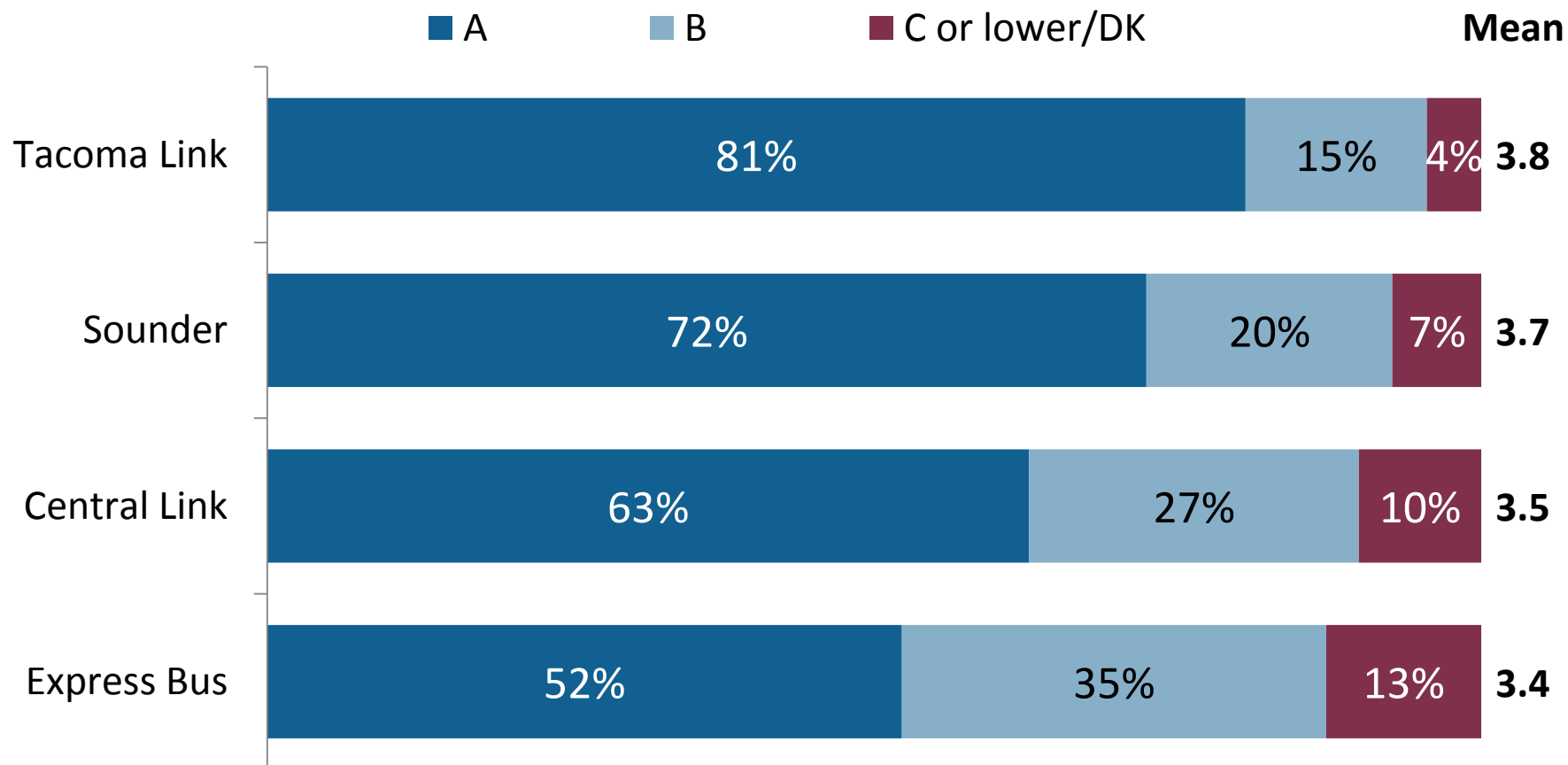
Satisfaction with travel time remains consistent, with the majority of riders giving an ST an A.



Q28. How would you grade your satisfaction with the total time it takes you to travel to your destination on this Express Bus/Sounder train/Link Light Rail?

Satisfaction with Travel Time – by Service

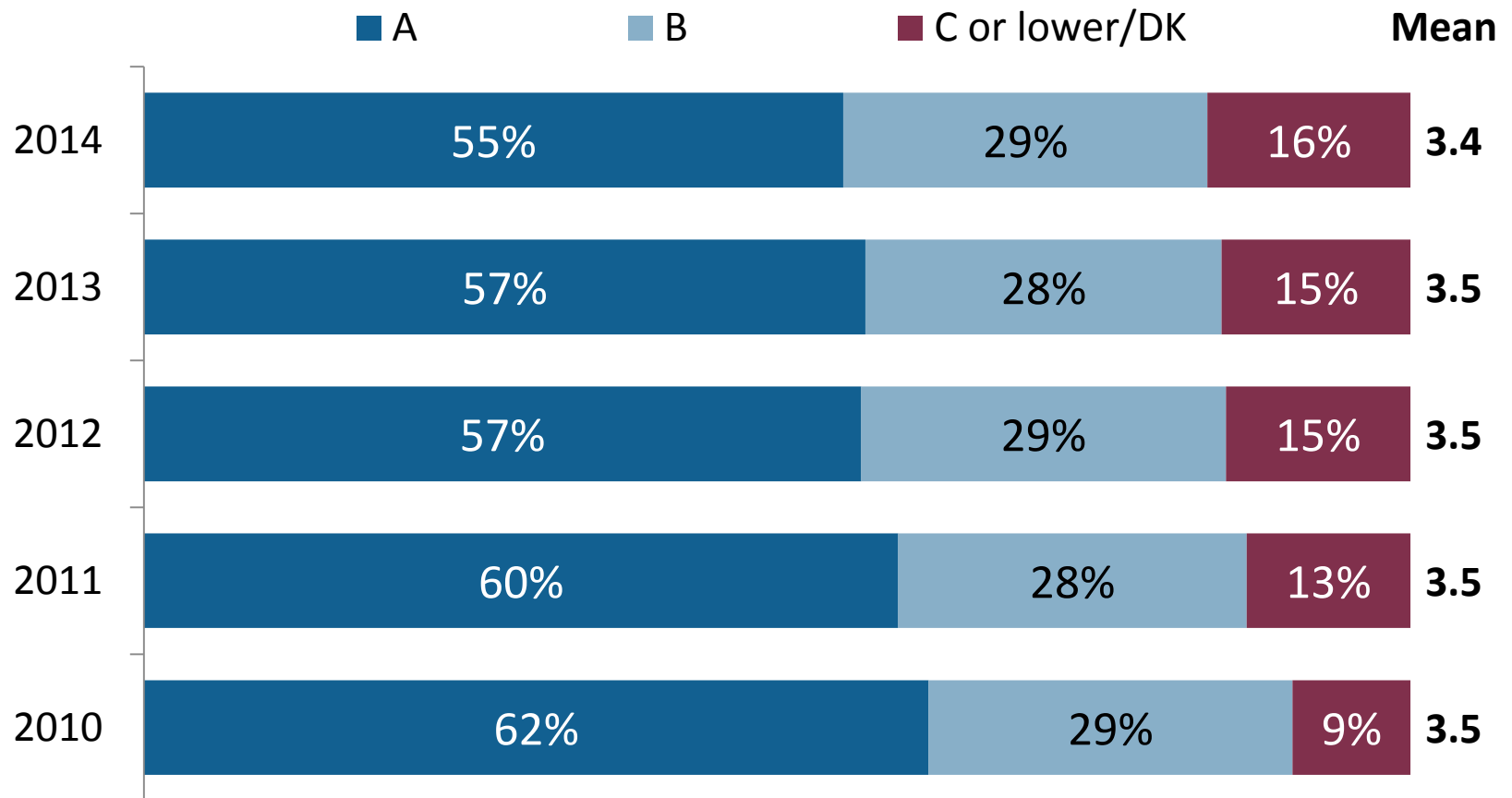
Express bus riders are least satisfied with travel time; however a majority still give this aspect an A grade.



Q28. How would you grade your satisfaction with the total time it takes you to travel to your destination on this Express Bus/Sounder train/Link Light Rail?

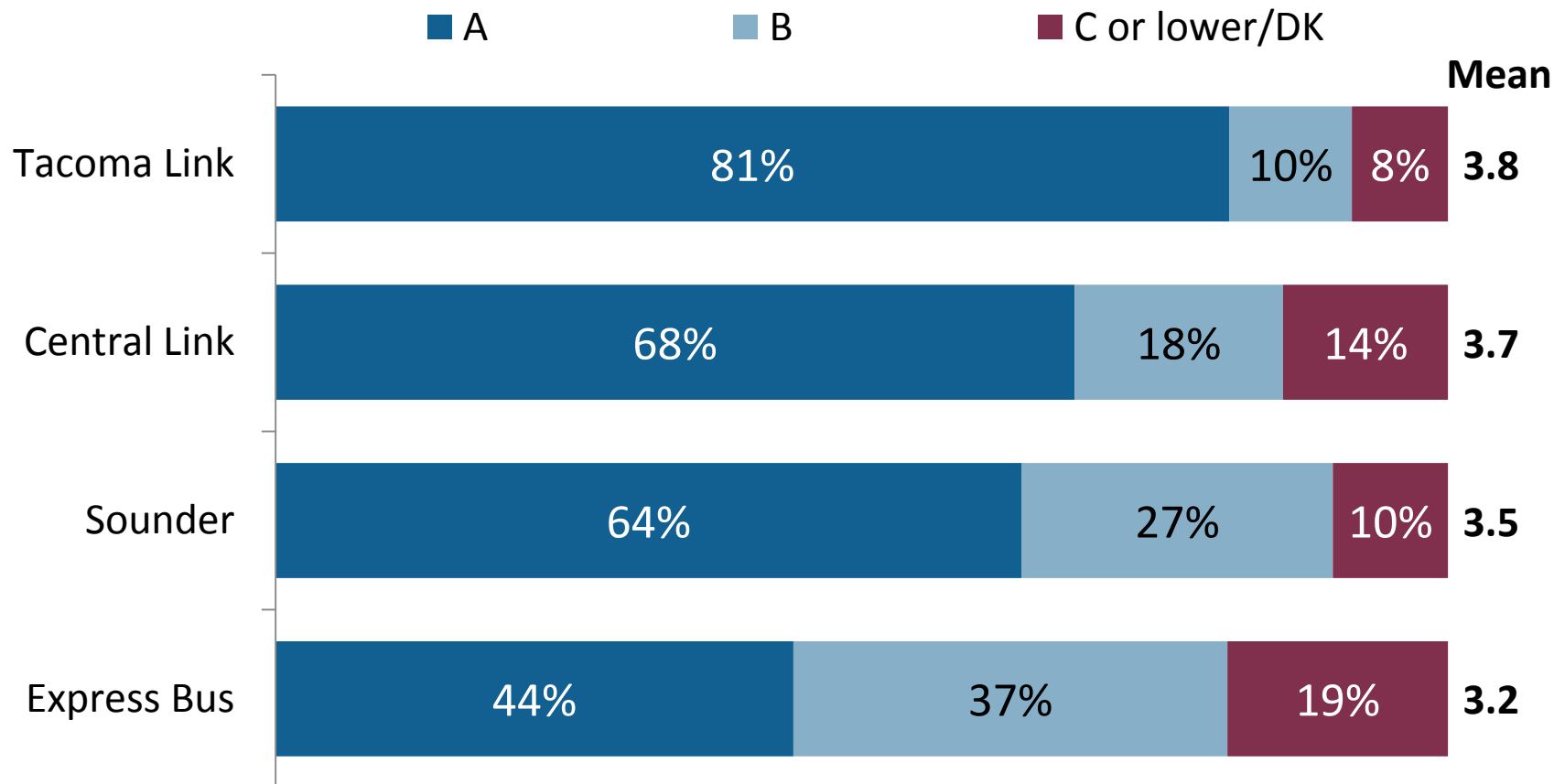
On-time Performance Year-to-Year

Satisfaction with on-time performance remains high and generally consistent with the last few years.



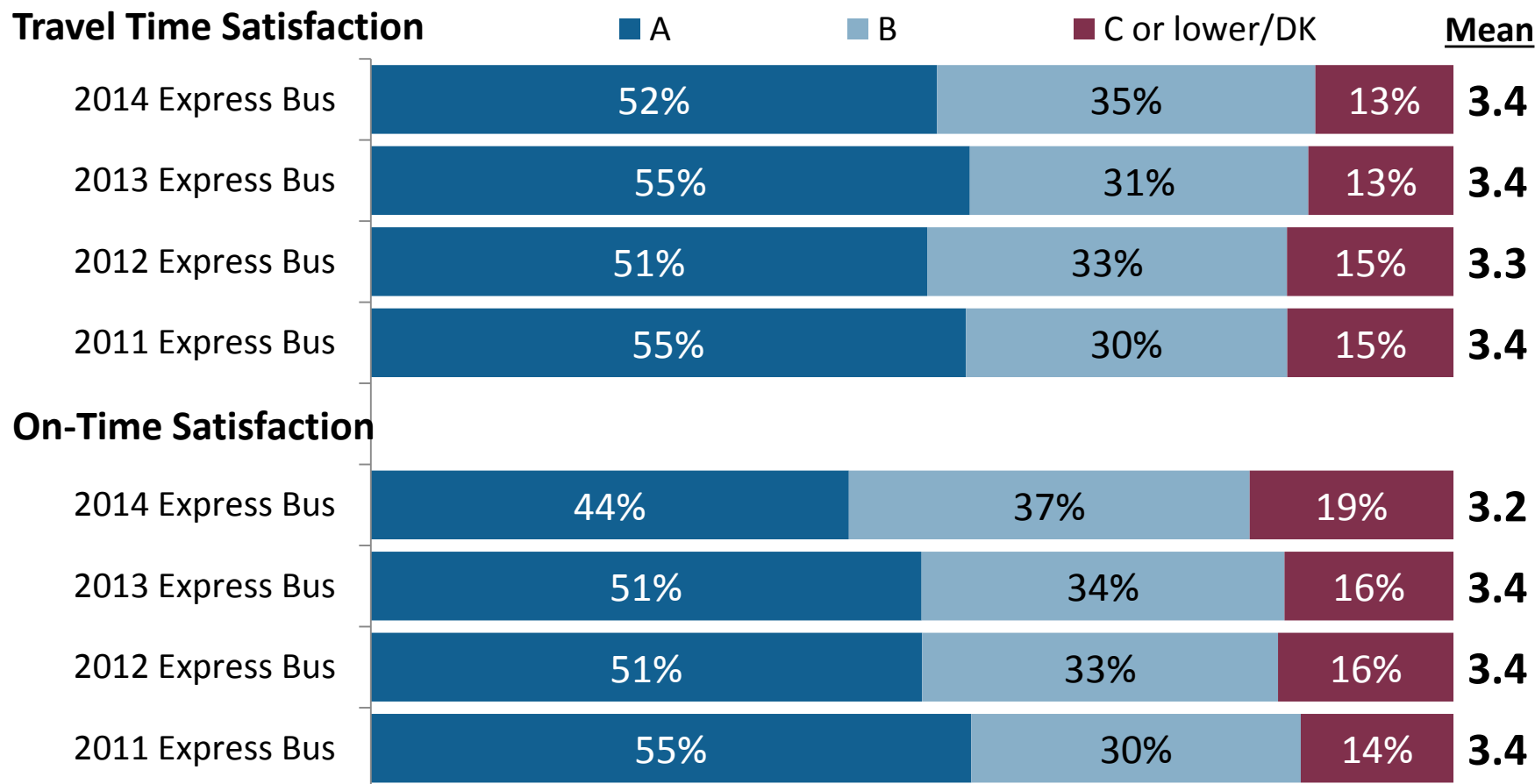
Satisfaction with On-time Performance – by Service

Express bus riders are least satisfied with on-time performance, although ratings for this aspect are still at a B.



Time Satisfaction – Express Bus Year-by-Year

Among Express bus riders, travel time satisfaction remained consistent from 2013 to 2014 but on-time satisfaction rating has declined (51 → 44% A grade).

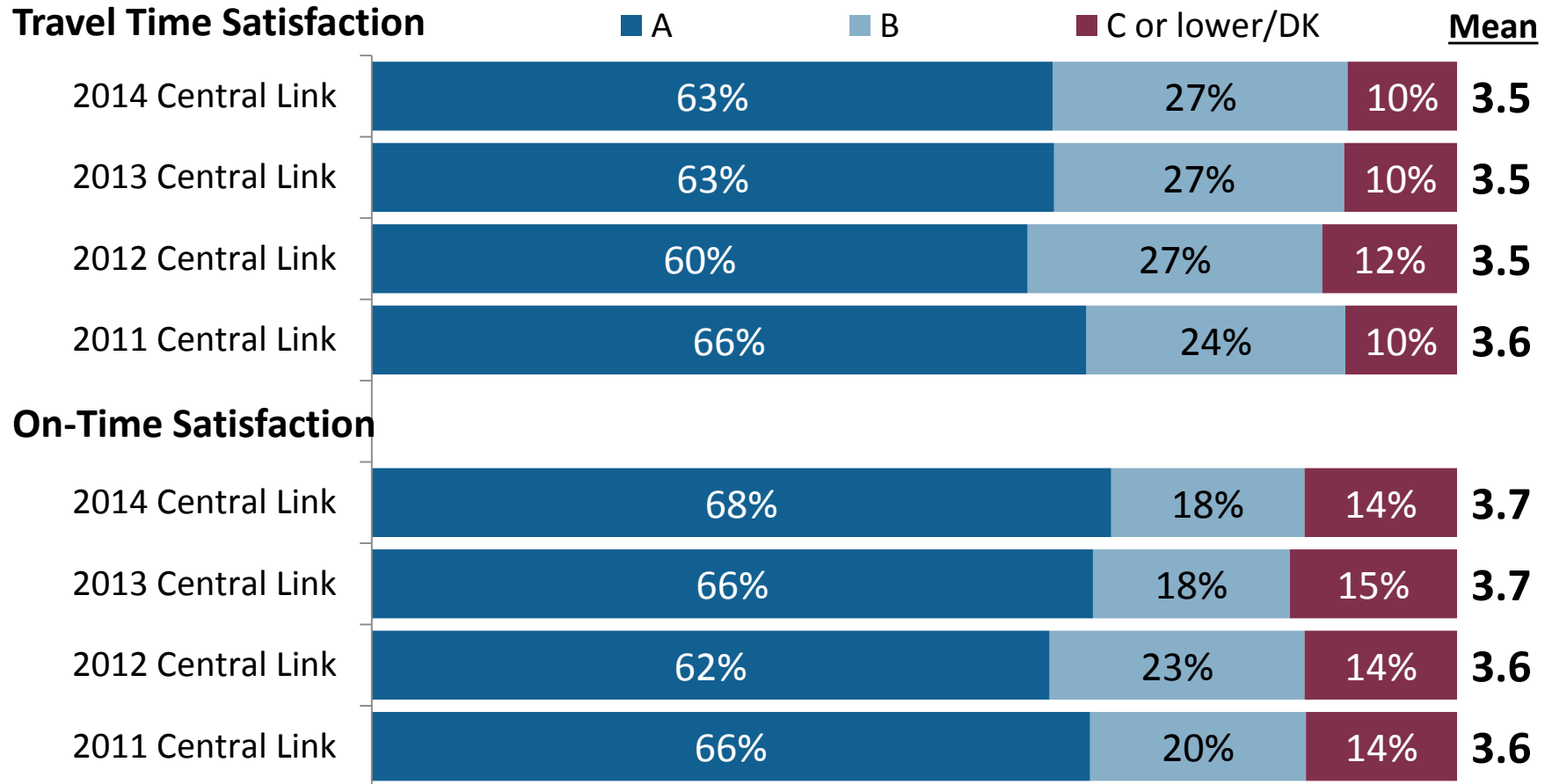


Q28. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

Q29. How would you grade the on-time performance of Express Bus/ LR/ Sounder?

Time Satisfaction – Central Link Year-by-Year

Satisfaction with travel time and on-time performance of Central link remains consistent, with a strong majority riders rating these attributes as an A.



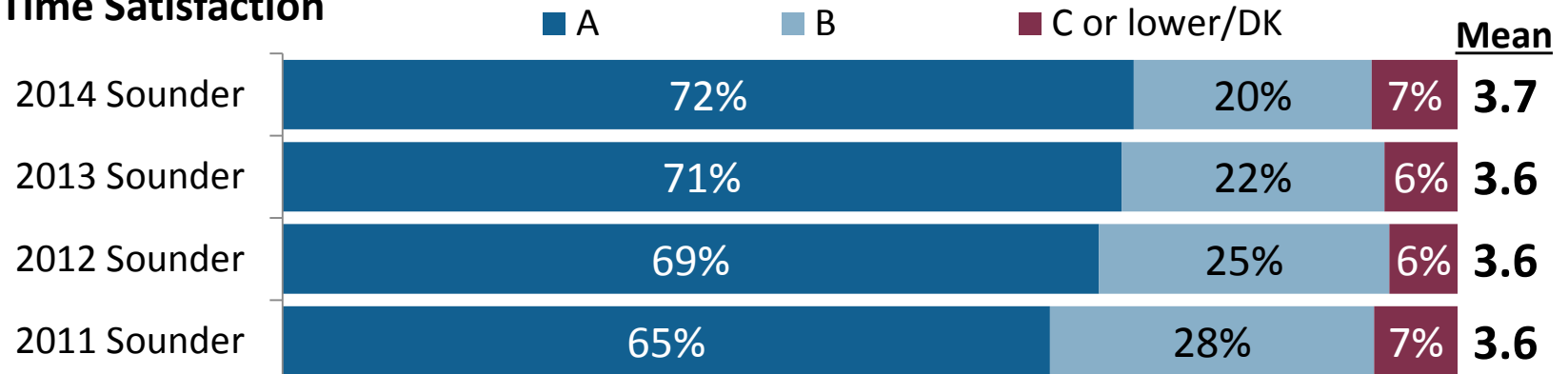
Q28. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

Q29. How would you grade the on-time performance of Express Bus/ LR/ Sounder?

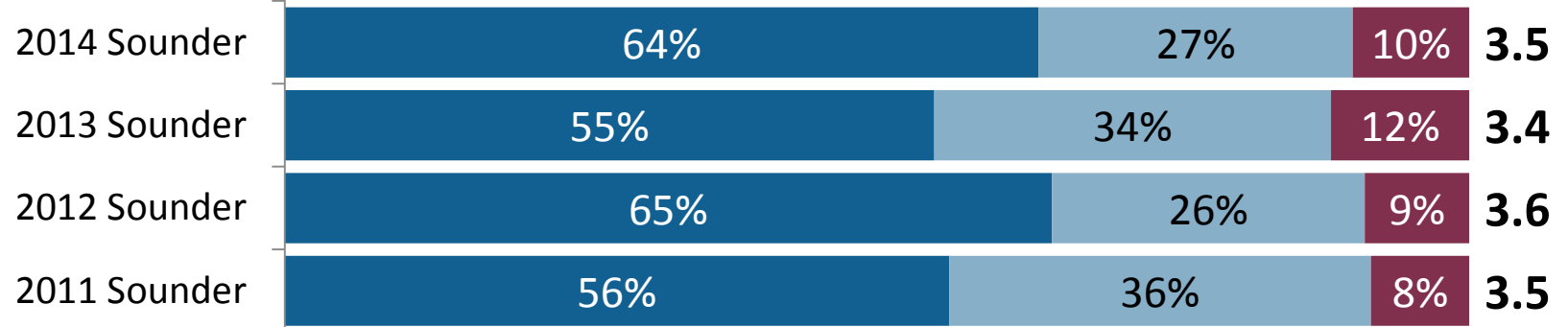
Time Satisfaction – Sounder Year-by-Year

Sounder travel time ratings remain strong, as about two-thirds of riders give these attributes an A grade. On-time performance, which has fluctuated in recent years, has rebounded from last year (55 → 64% A).

Travel Time Satisfaction



On-Time Satisfaction

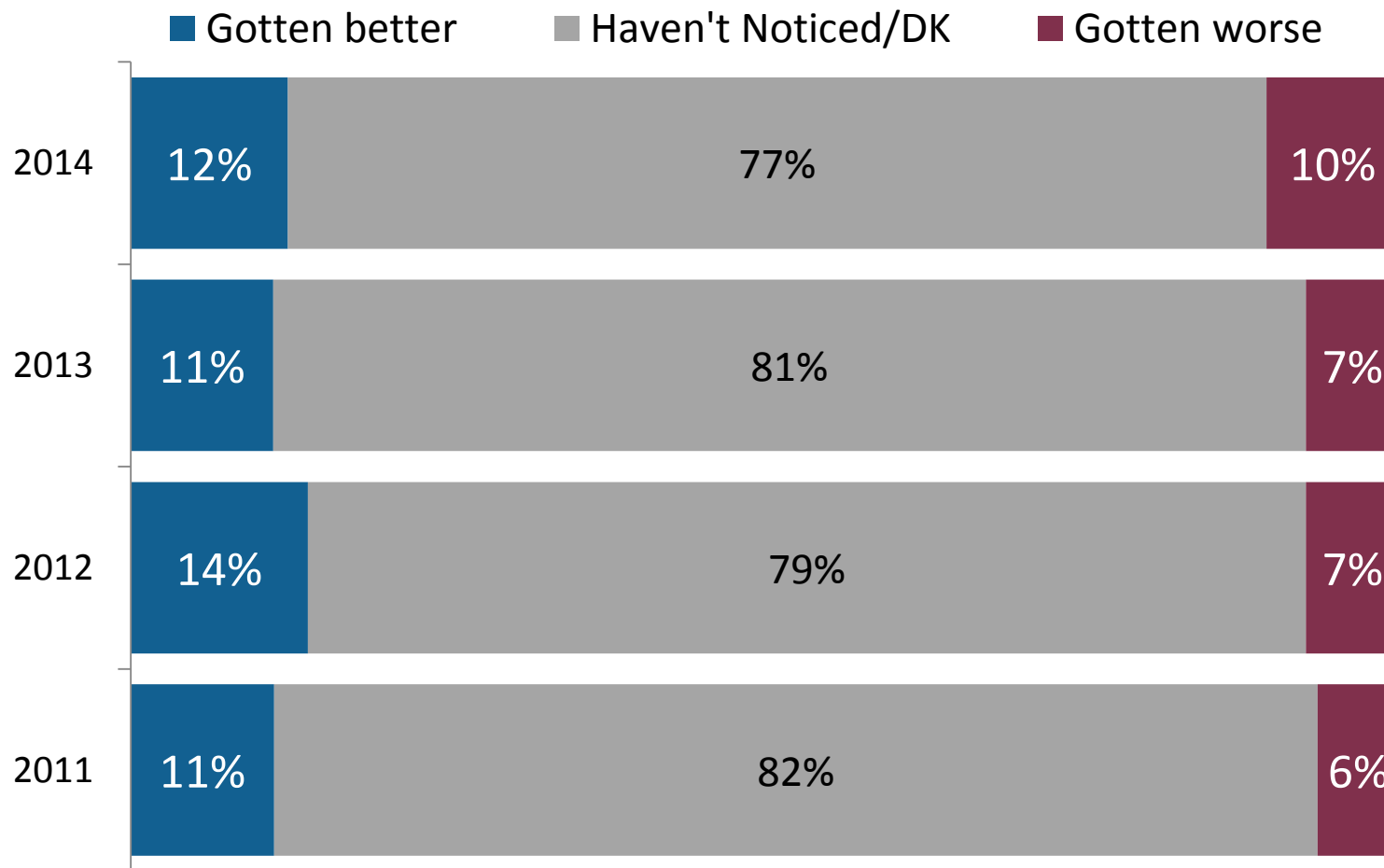


Q28. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

Q29. How would you grade the on-time performance of Express Bus/ LR/ Sounder?

Change in On-time Performance by Year

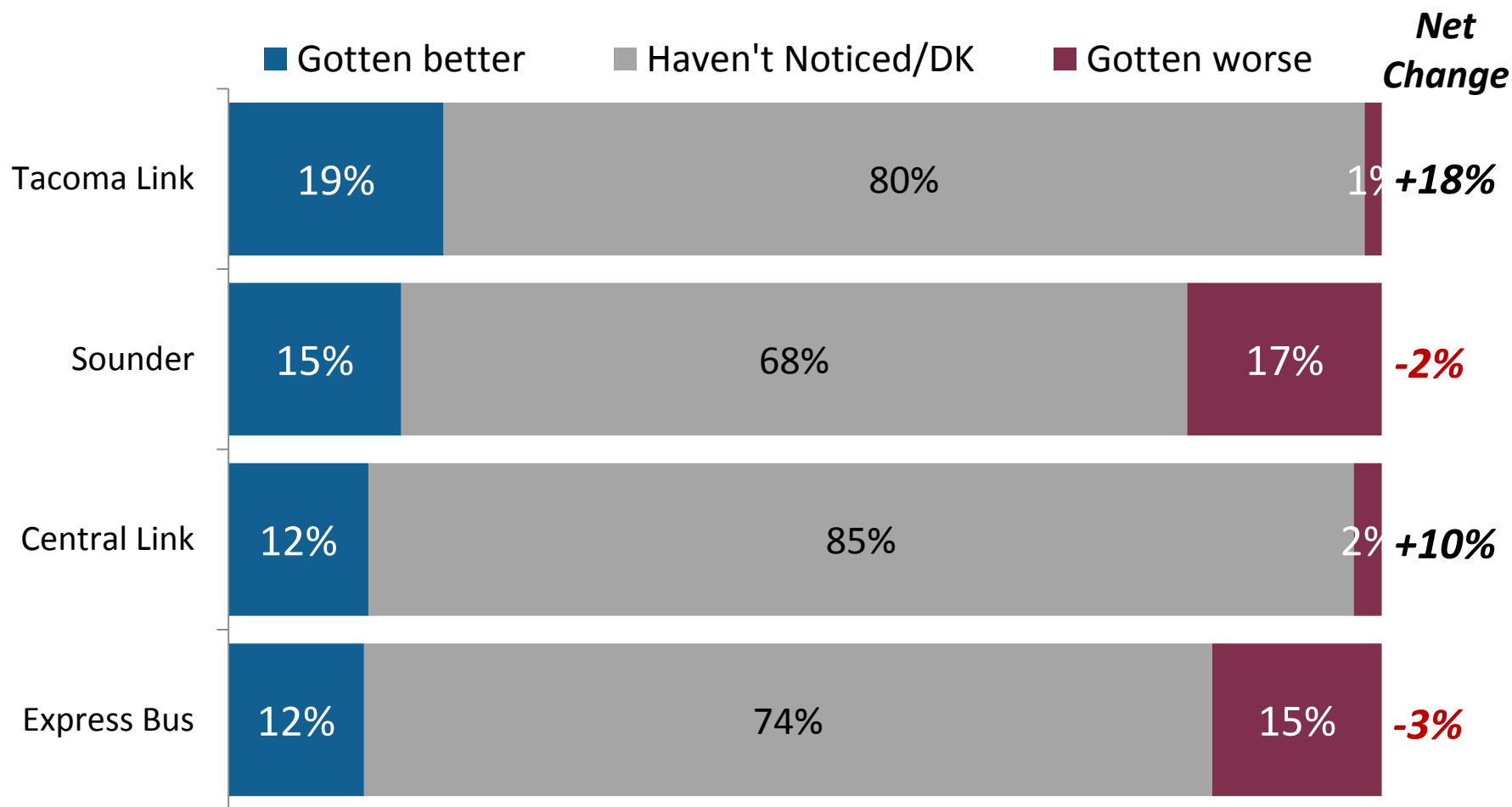
Most riders have not noticed a change in on-time performance in the past year.



Q30. in the last year, has the on-time performance gotten better, gotten worse, or have you not noticed a change?

Change in On-time Performance by Service

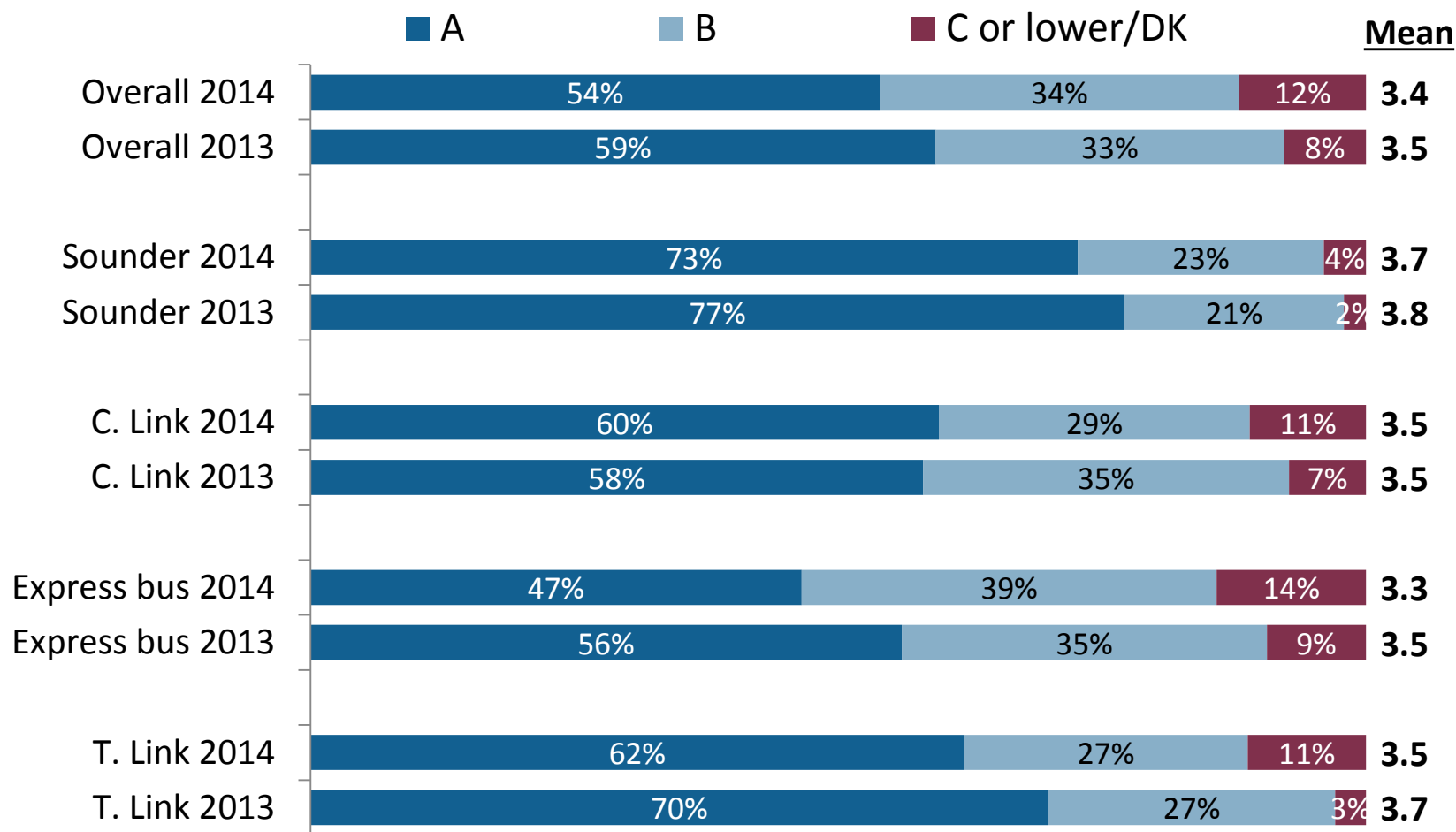
While a majority of Express Bus and Sounder riders haven't noticed a change in on-time performance, they are split on whether it has gotten better or worse over the last year. Link riders believe OTP is at least the same, if not better.



Q30. in the last year, has the on-time performance gotten better, gotten worse, or have you not noticed a change?

Cleanliness Rating

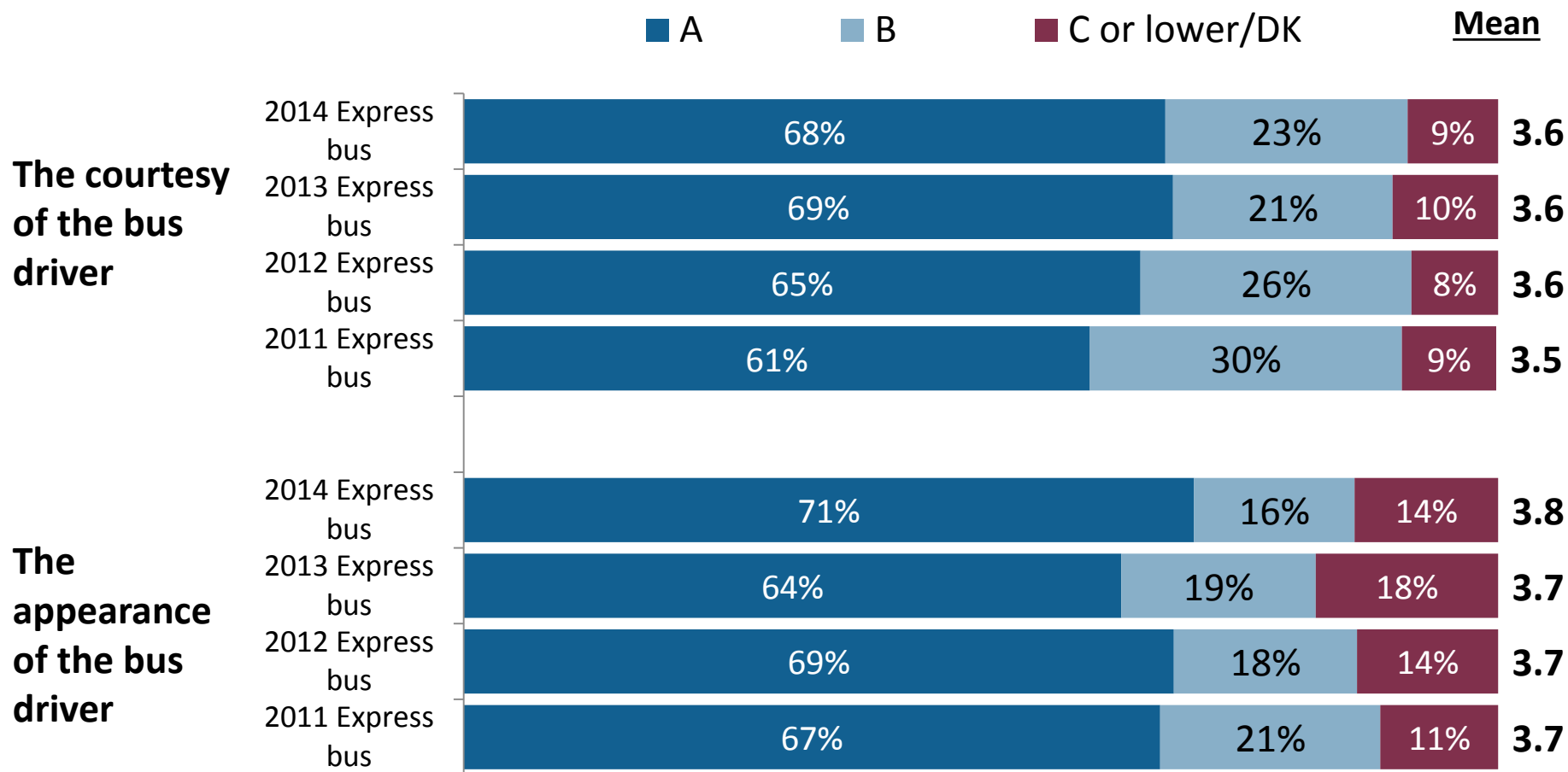
While most ST riders rate service cleanliness as at least a B, fewer Express bus riders gave cleanliness an A rating than last year. C/lower ratings also increased. Tacoma Link ratings also dropped but the difference is within the margin of error (+/- 8.5pts).



Q21. How would you grade the average cleanliness of the bus/Sounder/Link cabin? If you're not sure, please say so.

Express Bus Operator Ratings

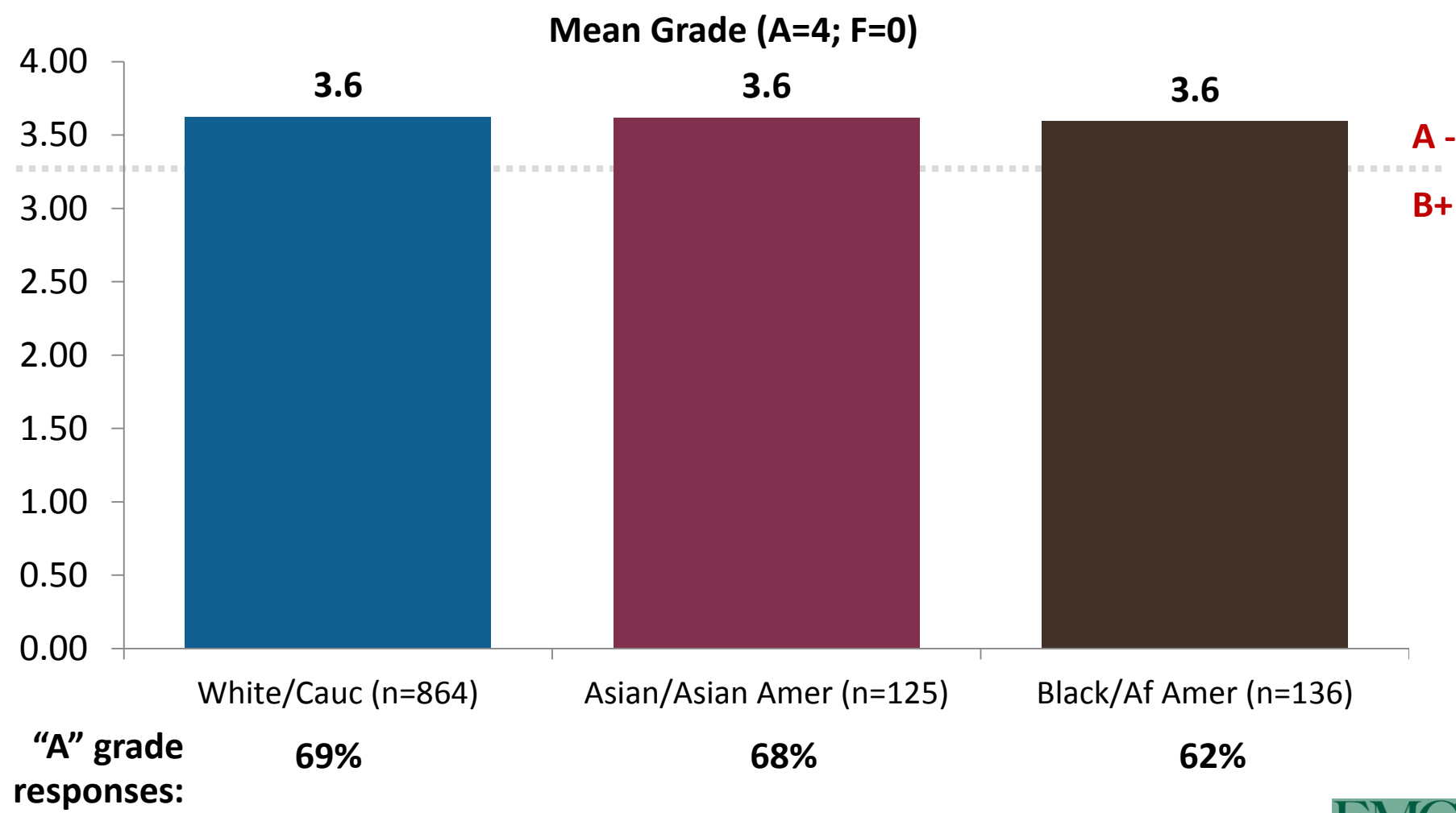
Satisfaction with Express Bus driver demeanor and appearance remains high (68% or higher A grades); consistent with past years.



Q22-23. Using a scale of **A** through **F**, where **A** means **excellent** and **C** means **average**, and **F** means **failing**, how would you grade the following? (n=211)

Bus Driver Courtesy by Rider Ethnicity

Grading of driver courtesy does not vary significantly between ethnicities. Most give bus drivers an A for courtesy.



Q22. Using the same scale, what grade would you give to the **courtesy** of the bus driver?

Bus Performance Attributes – by Route Region

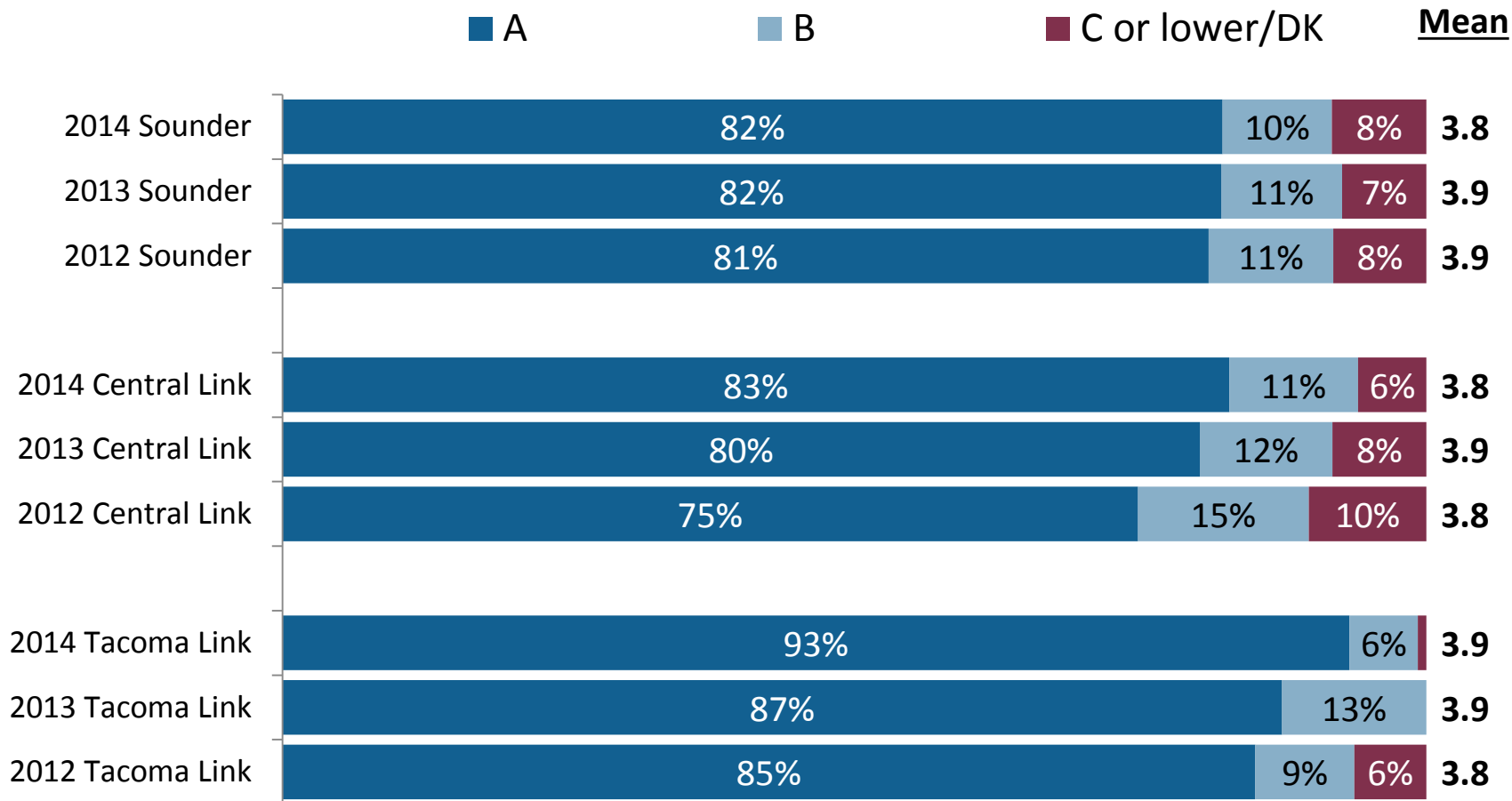
Each Express bus attribute was rated fairly high (B or higher). Riders on North/Snohomish County routes gave lower grades on most attributes. Cleanliness ratings are fairly consistent across all major regional groups (B+). Physical condition of stations is rated lowest among South King/Pierce and Snohomish routes (B).

Mean Grade (A=4; F=0)

Attribute	All Express buses	Seattle-South (566/567, 574, 577/578, 586, 590-595)	Seattle-Snohomish (510-513)	Seattle-E King (522, 540, 542, 545, 550, 554, 555/556)	Route Excludes Downtown Seattle (532, 535, 560)
<i>Number of interviews (n)</i>	<i>536n</i>	<i>131n</i>	<i>64n</i>	<i>288n</i>	<i>53n</i>
6. Overall grade	3.3 (B+)	3.3 (B+)	3.2 (B)	3.2 (B)	3.4 (B+)
21. the average cleanliness	3.3 (B+)	3.3 (B+)	3.3 (B+)	3.3 (B+)	3.5 (B+)
22. the courtesy of the bus driver?	3.6 (B+)	3.7 (A-)	3.4 (B+)	3.6 (B+)	3.7 (A-)
23. the appearance of the bus driver?	3.8 (A-)	3.8 (A-)	3.8 (A-)	3.8 (A-)	3.7 (A-)
26. the physical condition of the stops?	3.2 (B)	3.1 (B)	3.0 (B)	3.3 (B+)	3.3 (B+)
28. satisfaction with the total travel time	3.4 (B+)	3.3 (B+)	3.2 (B)	3.4 (B+)	3.5 (B+)
29. on-time performance	3.2 (B)	3.3 (B+)	3.2 (B)	3.2 (B)	3.4 (B+)

Train Conductor Rating

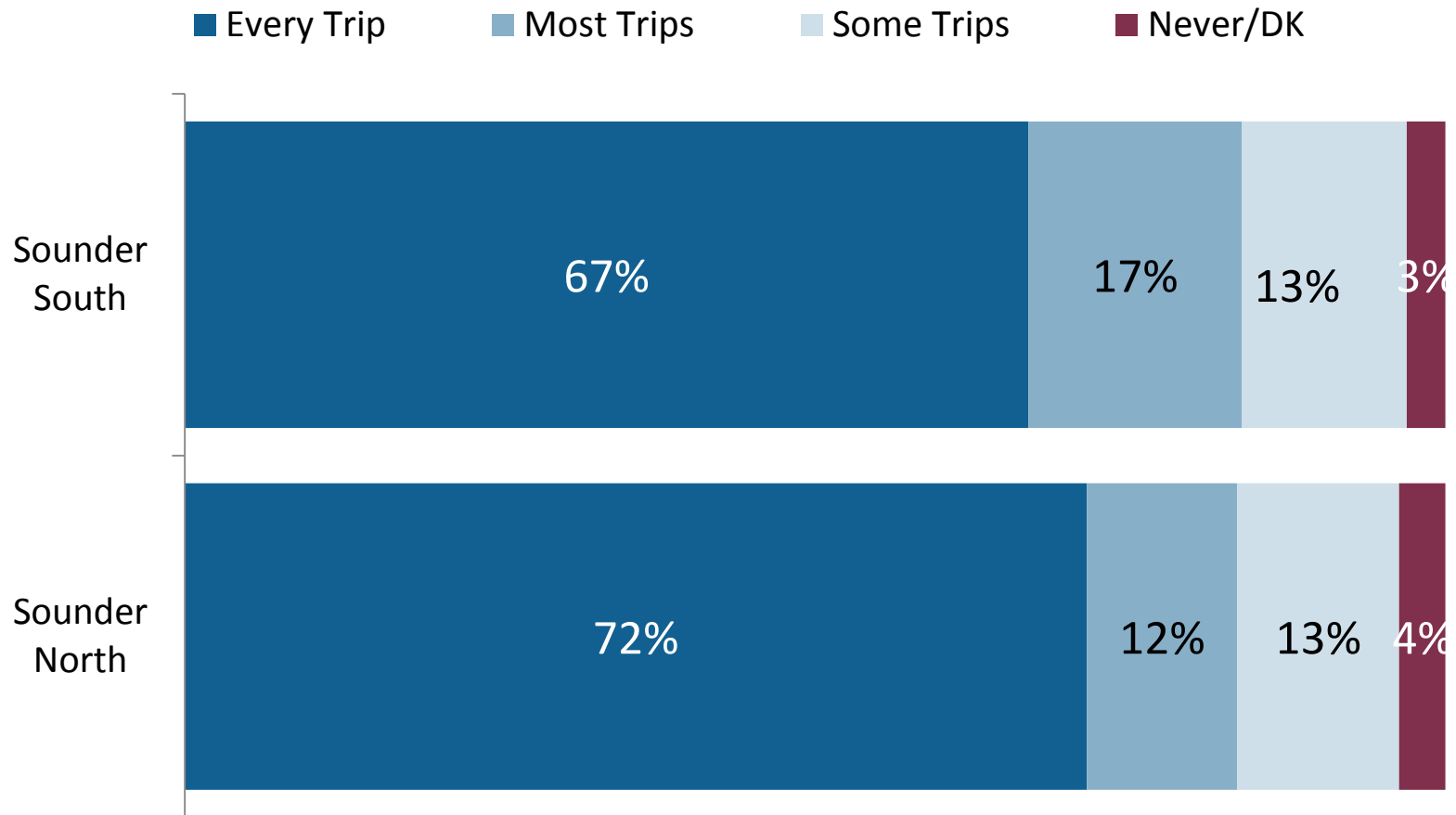
Satisfaction with operators across all rail services remains high and consistent with previous years.



Q25. Using a scale of **A** through **F**, where **A** means **excellent** and **C** means **average**, and **F** means **failing**, how would you grade the following the job the train operator is doing?

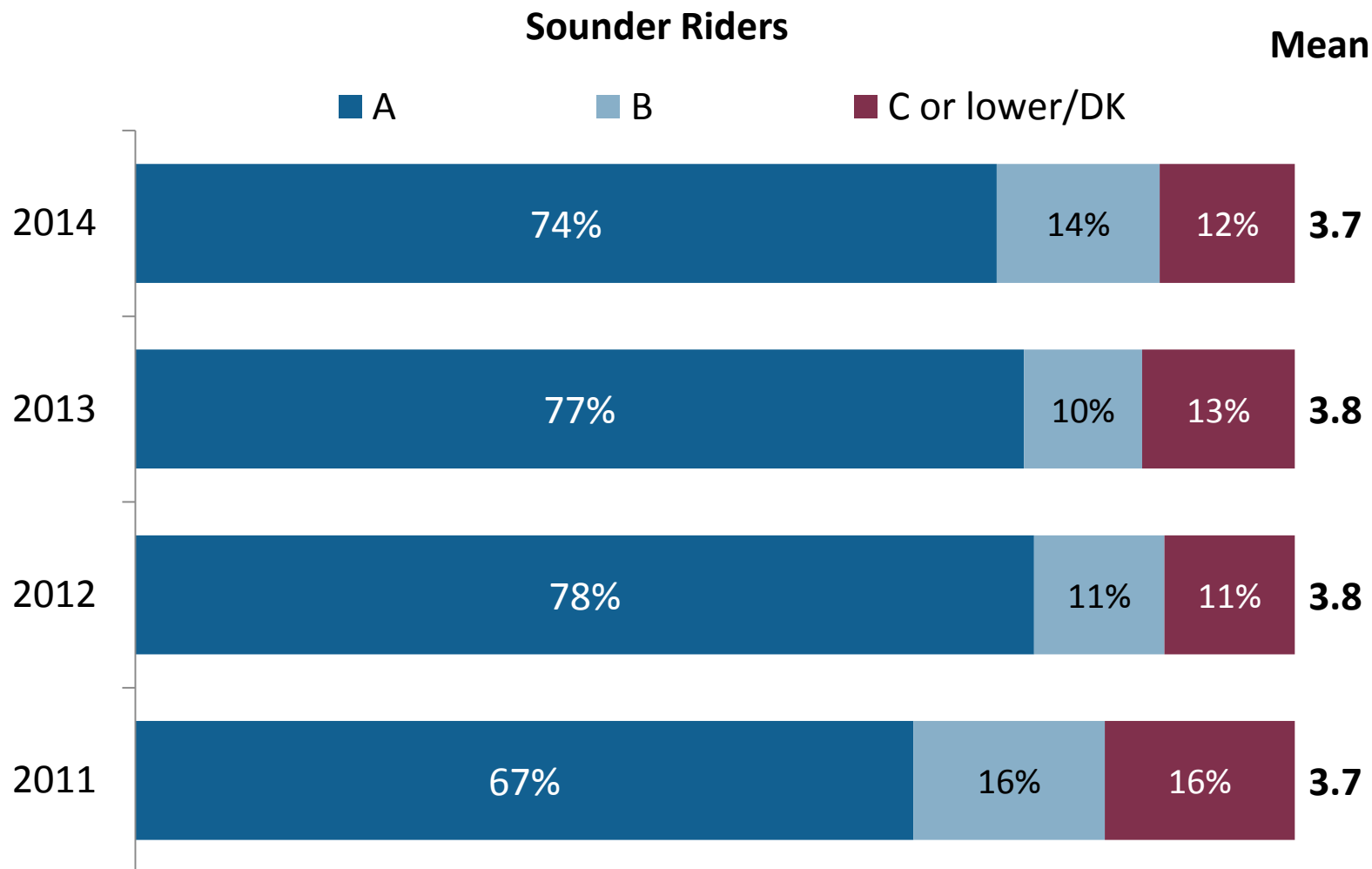
Sounder Station Staff

Most Sounder riders see Sounder staff at stations.



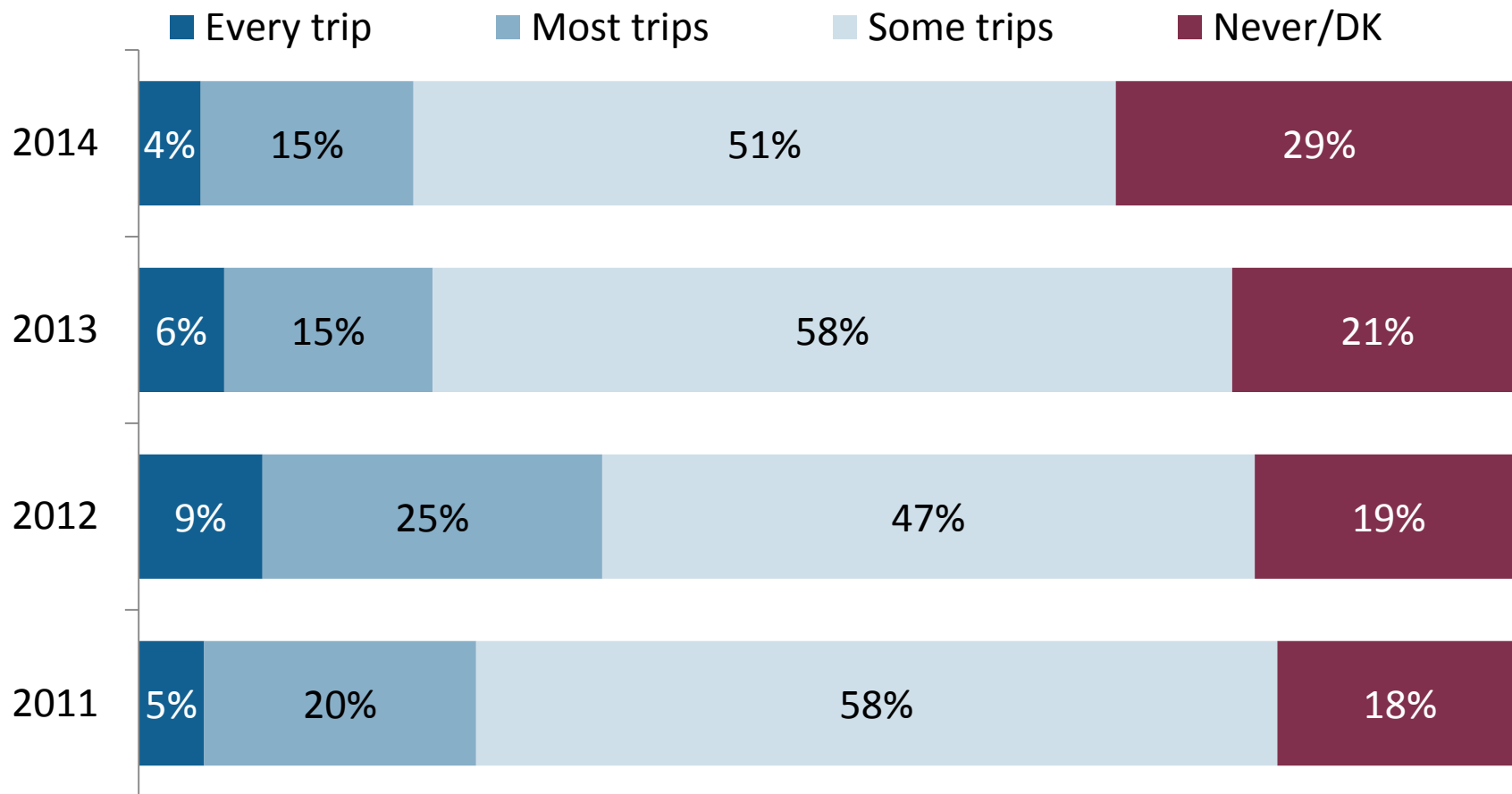
Sounder Station Agents

Most riders grade Station Agents at an A, consistent with previous years.



Light Rail Fare Inspectors

An increasing number of light rail riders have never seen or do not recall seeing a fare inspector. The portion of riders who report seeing them on at least some trips is gradually declining.

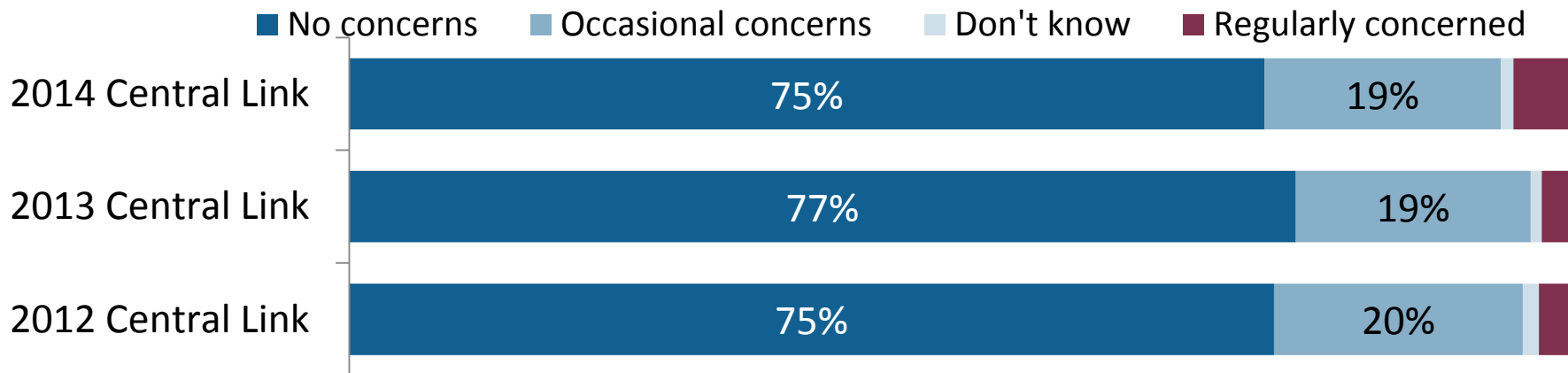


Safety Ratings

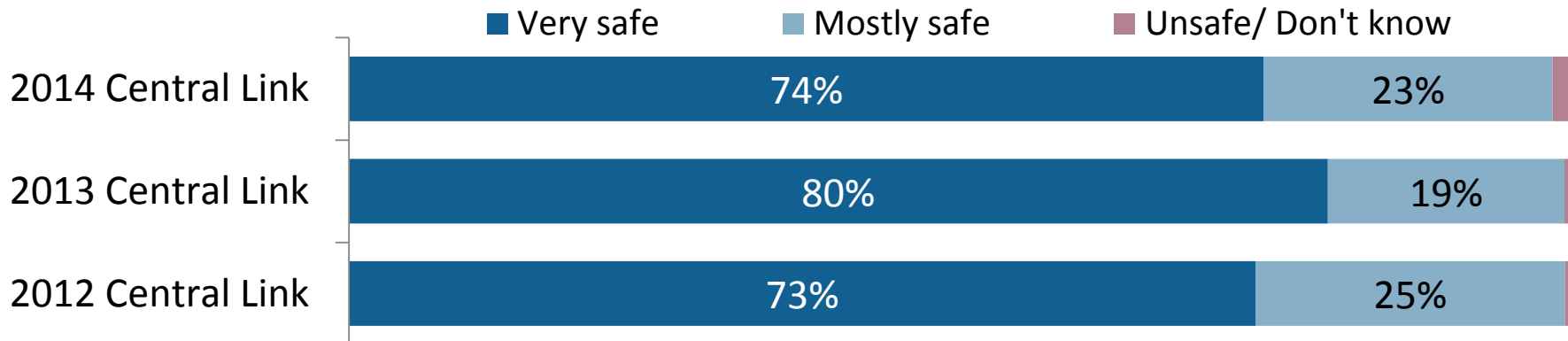
Safety at Station/Onboard – Central Link

Safety ratings among Central Link riders – both on-board and at stations – remain consistent with previous years.

Safety at Station



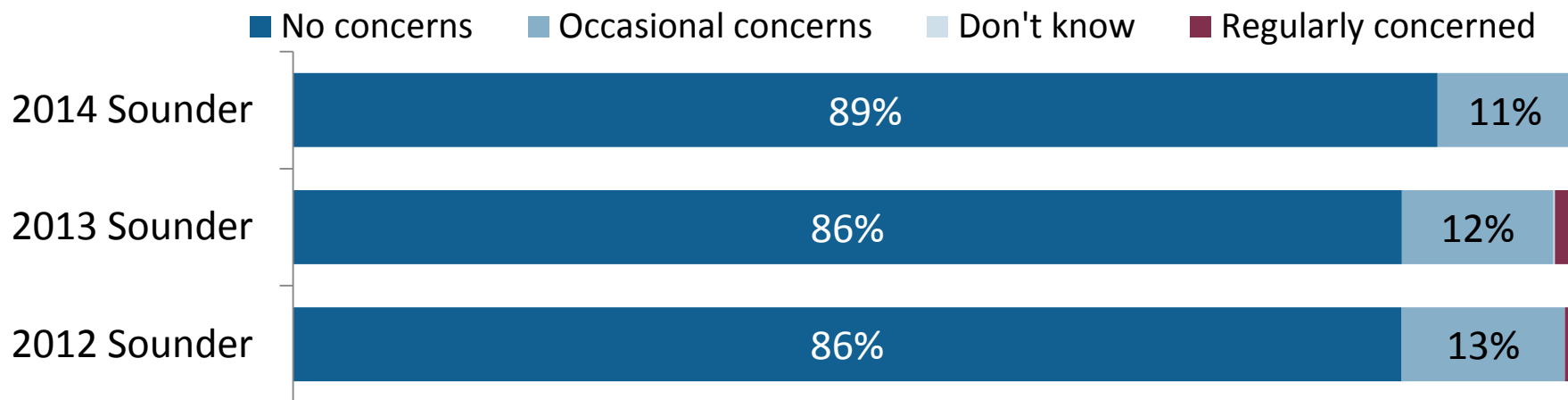
Safety On-Board



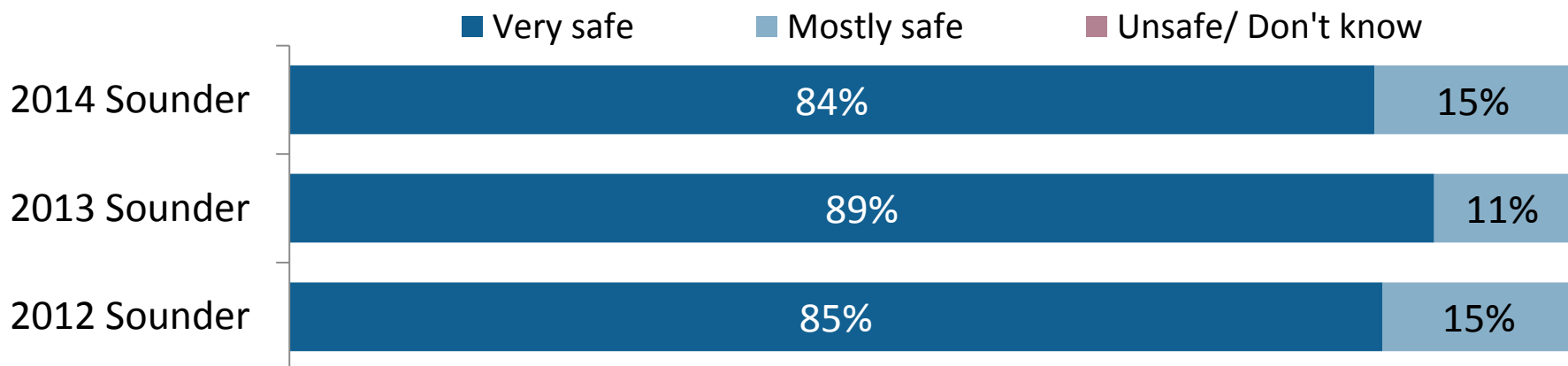
Safety at Station/Onboard - Sounder

Overwhelmingly, Sounder riders feel safe while waiting for the train as well as on-board.

Safety at Station



Safety On-board



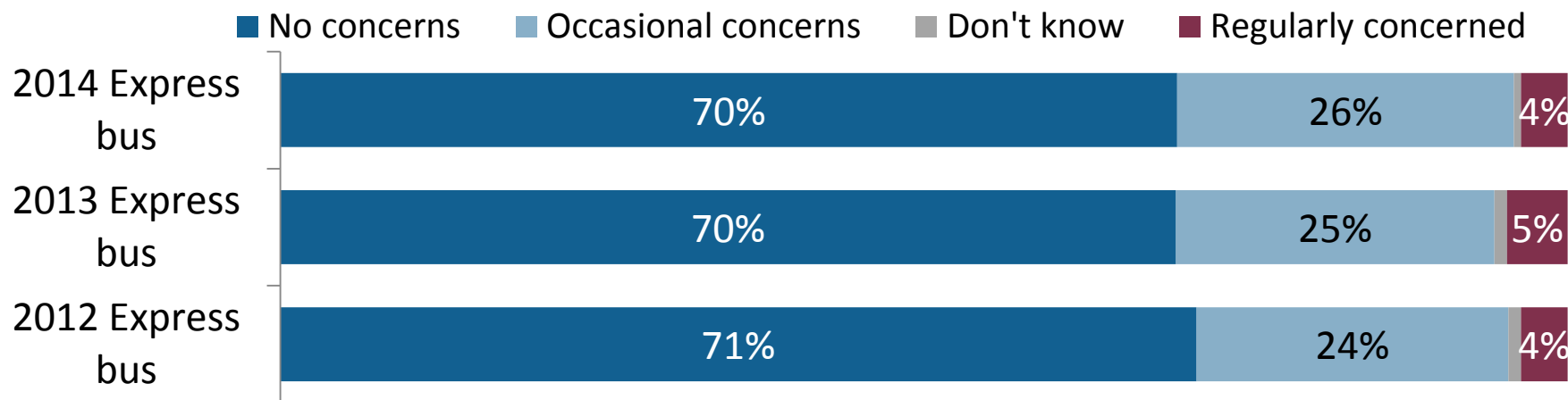
Q37. How would you rate your safety while waiting at the [stop/station] for [your bus/Light Rail/Sounder]?

Q38. And how would you rate the safety of the ride on the bus/Sounder/Light Rail?

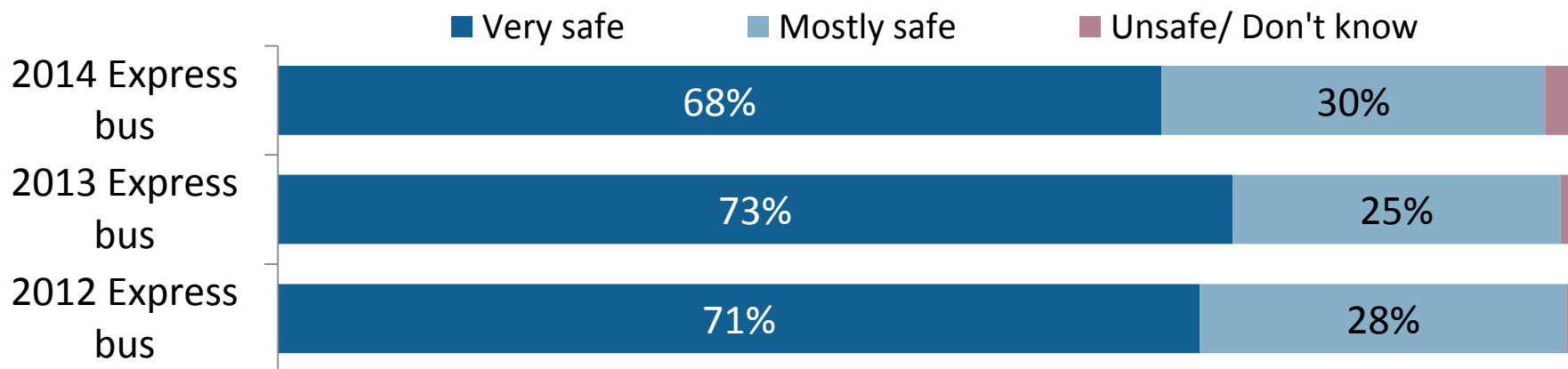
Safety at Station/Onboard – Express Bus

While Express Bus riders generally have few concerns while waiting for the bus, there is a slight decline in those who feel very safe on-board.

Safety at Stop/Station



Safety On-board

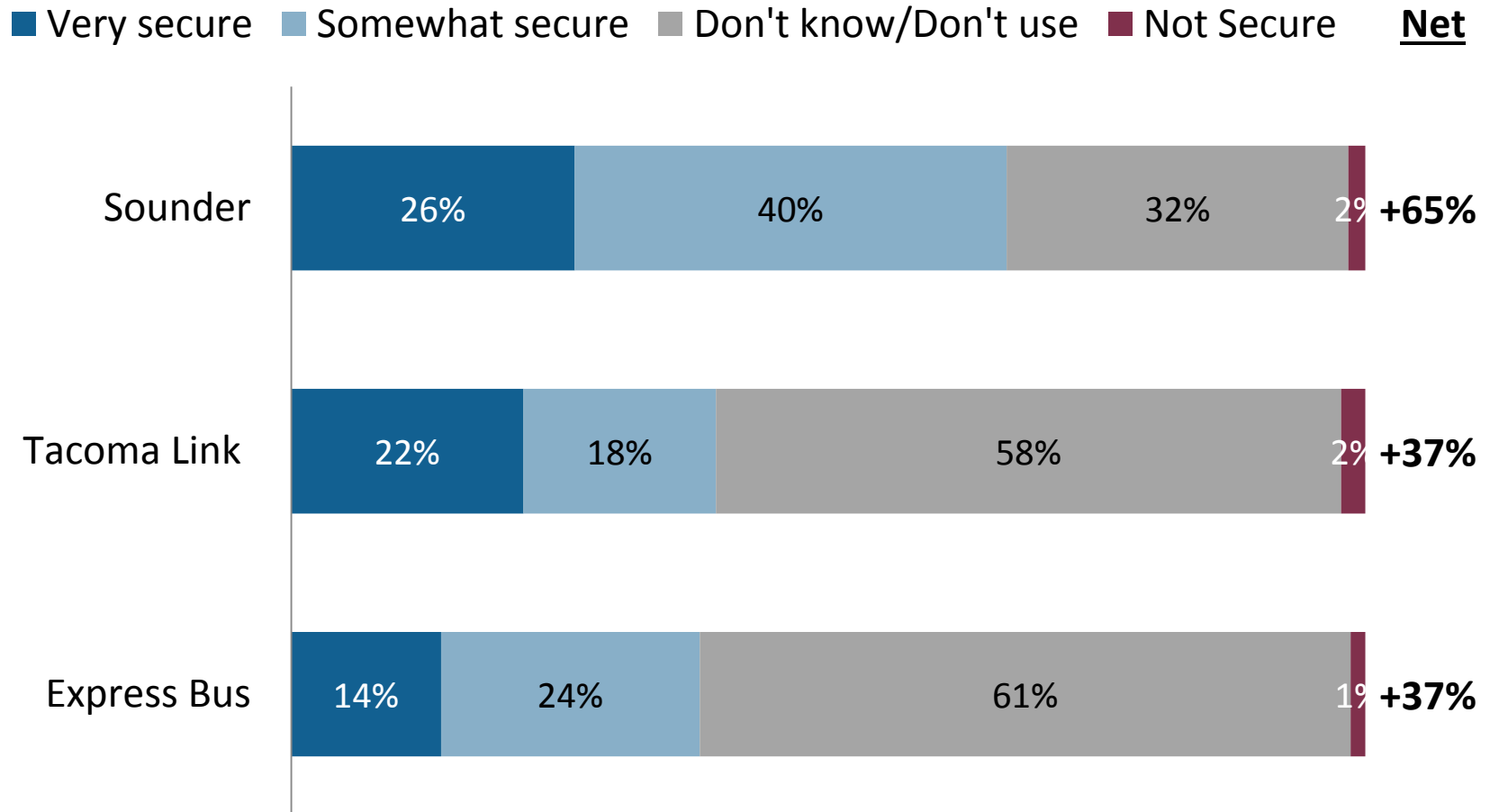


Q37. How would you rate your safety while waiting at the [stop/station] for [your bus/Light Rail/Sounder]?

Q38. And how would you rate the safety of the ride on the bus/Sounder/Light Rail?

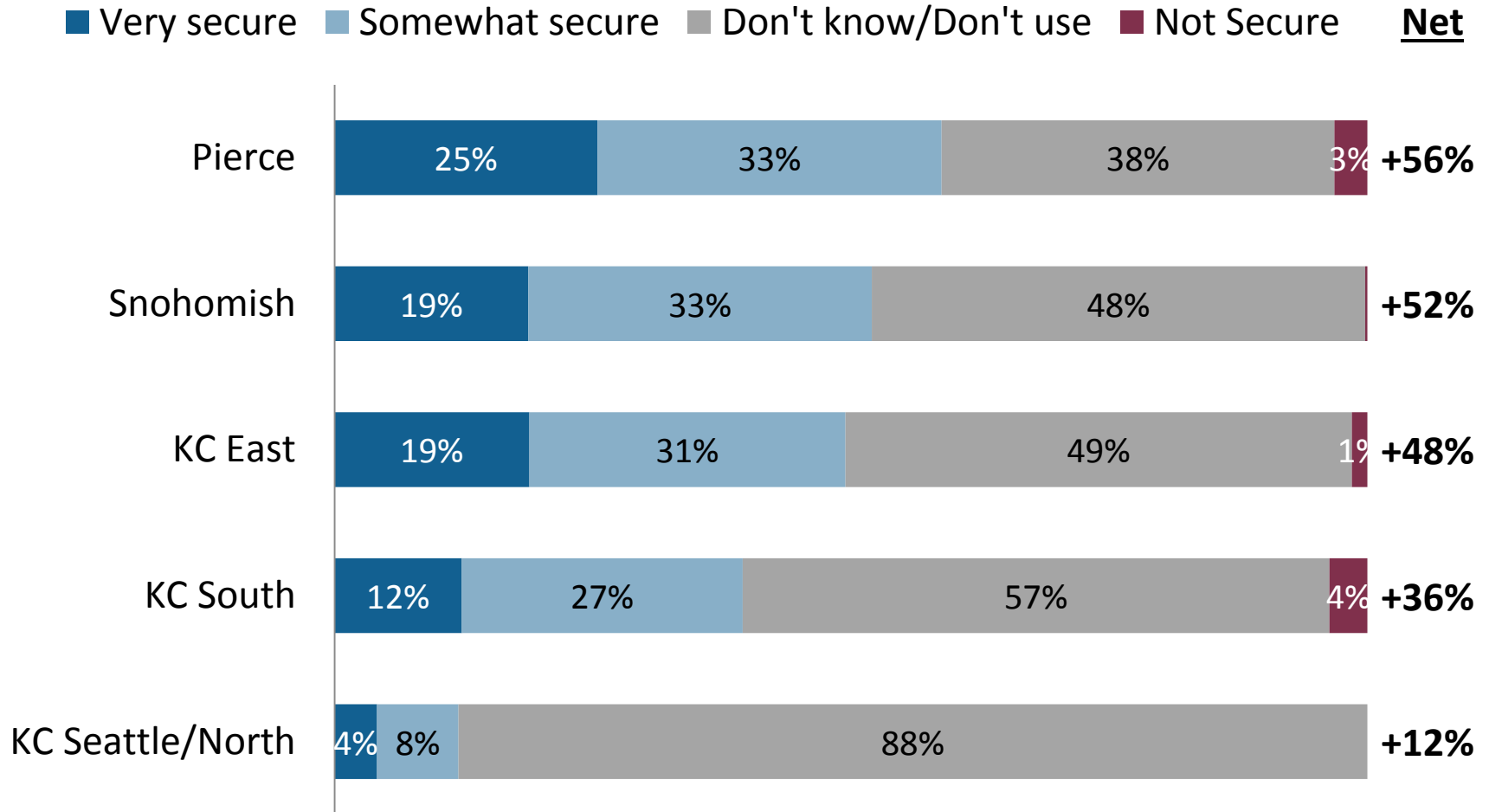
Vehicle Security at Park & Ride – By Service

Very few ST riders on any service feel their vehicle is insecure at a Park and Ride. A majority of Tacoma Link and Express bus riders don't even use park and rides.



Vehicle Security at Park & Ride – By Geography

Riders feel safe leaving their cars at most park and rides. Reported P&R usage is highest among Pierce and Snohomish riders while most riders in South and North King do not use a park and ride.

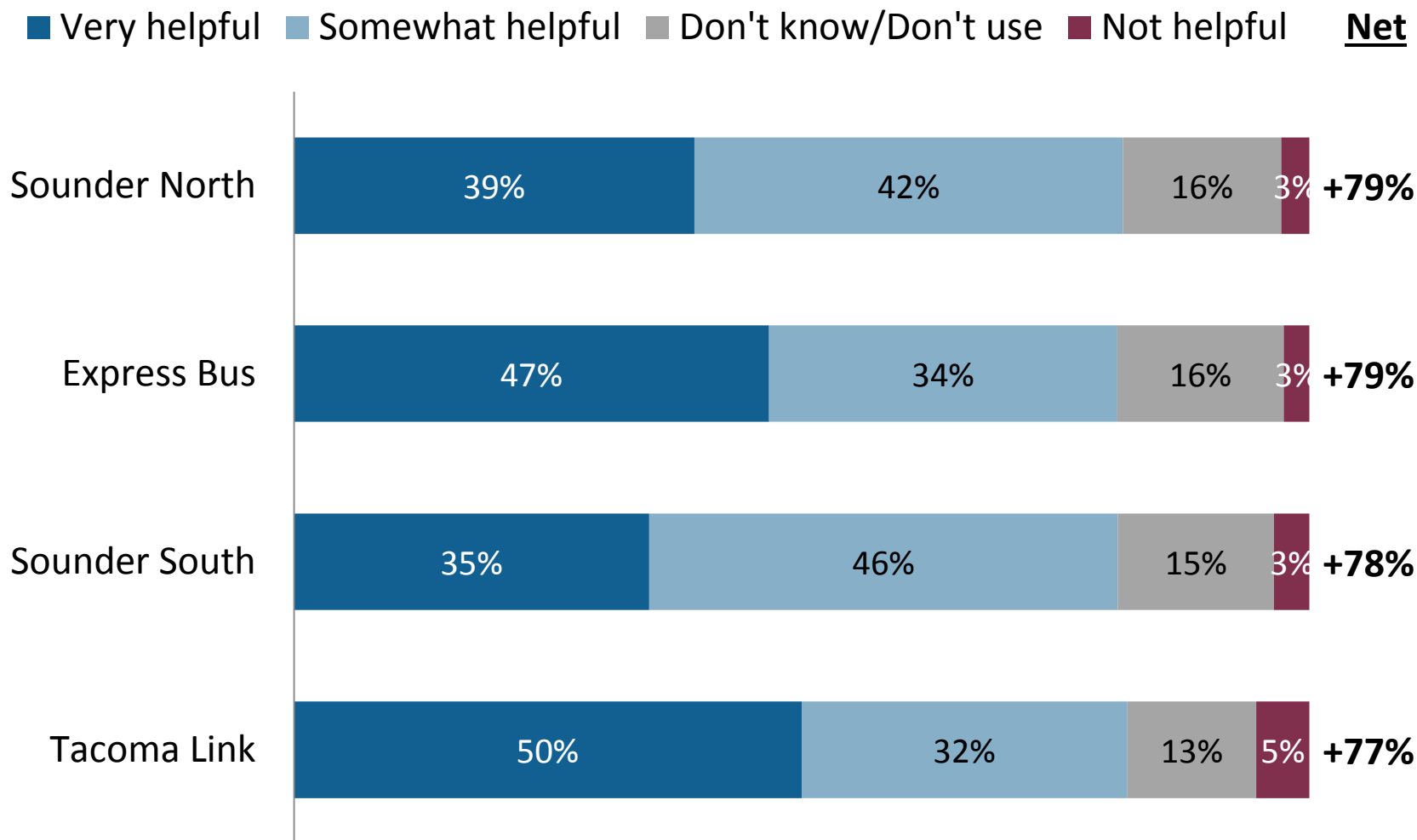




Ease of Use

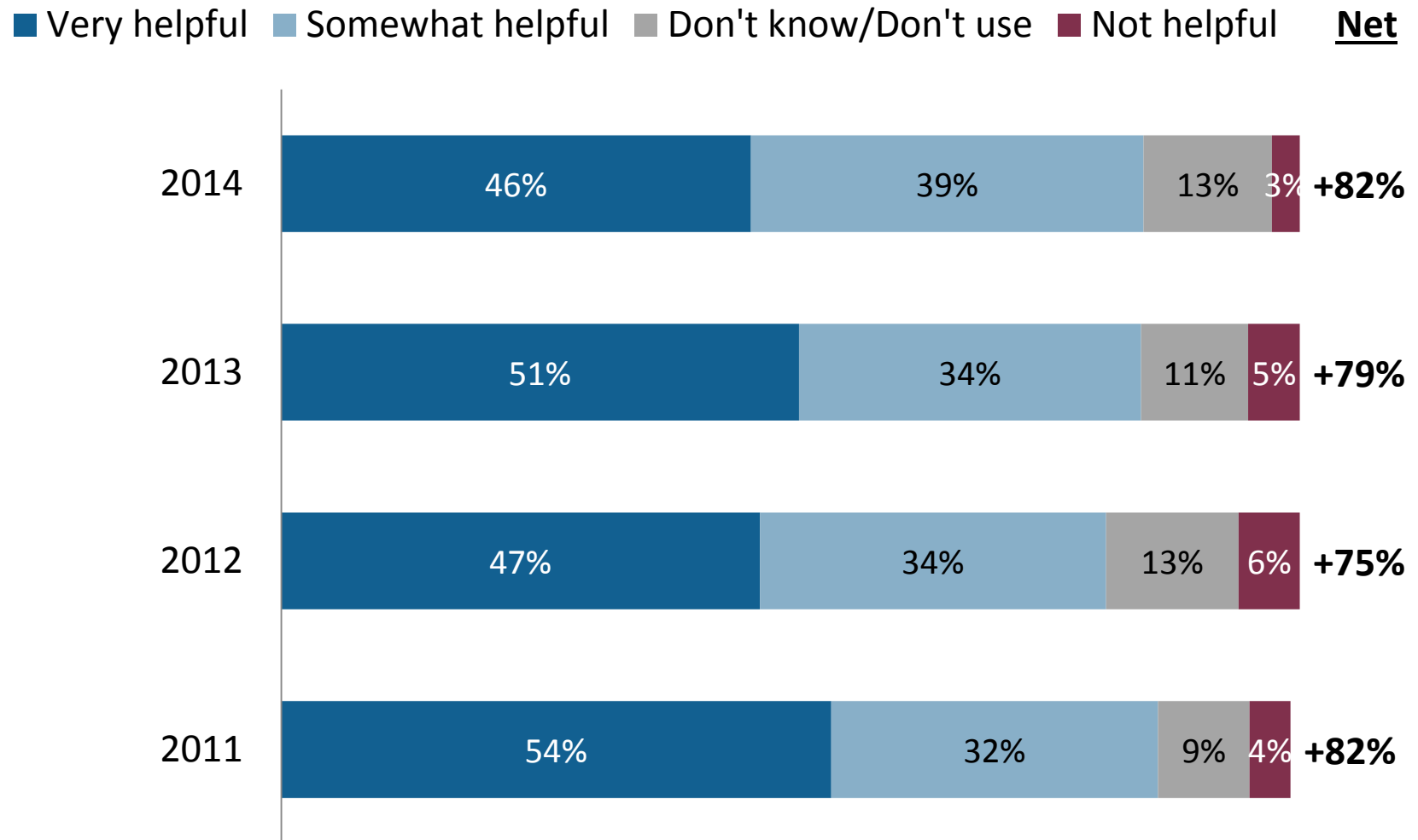
Stops and Signs – By Service

Most ST riders find posted information at stops and signs helpful.



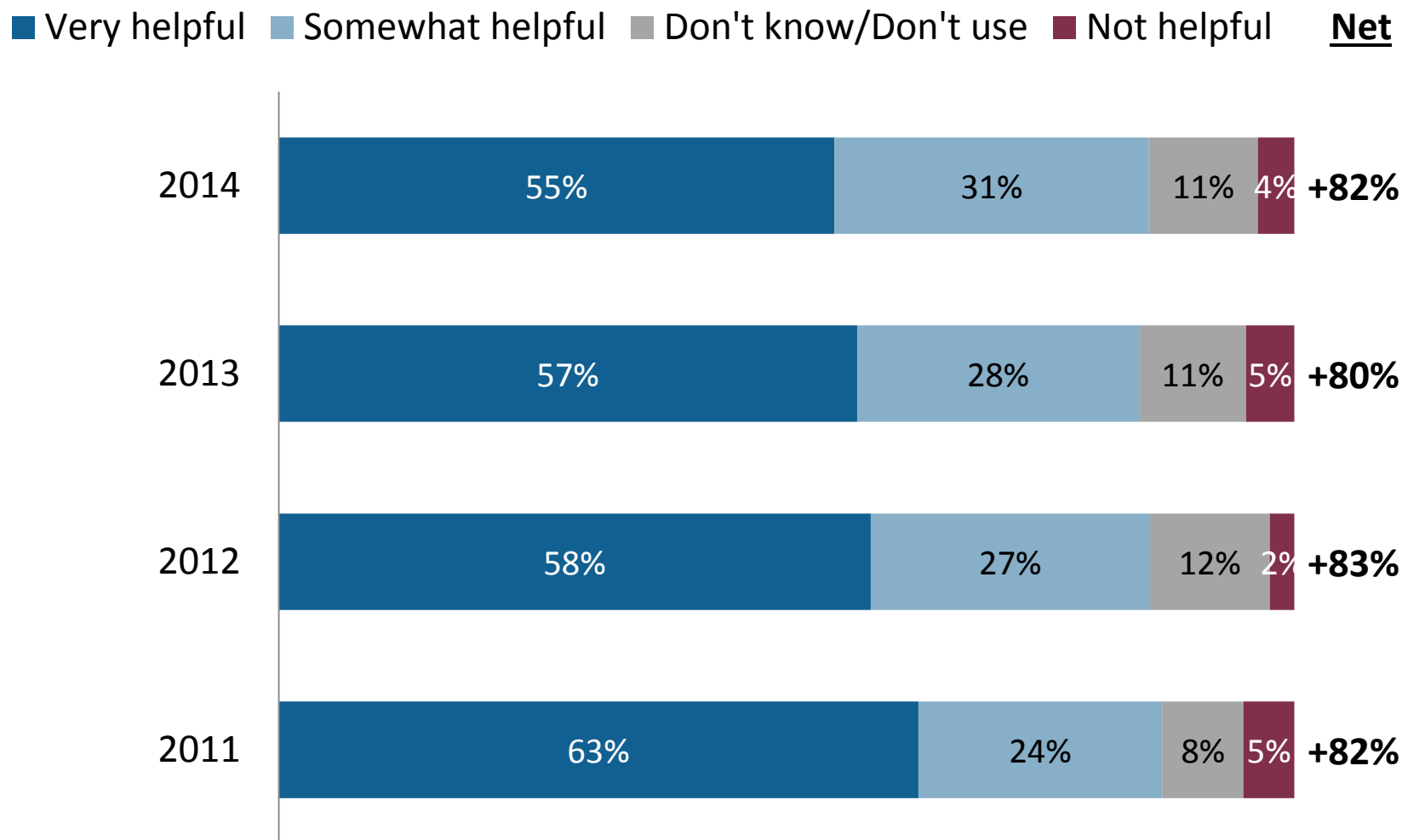
Public Announcements – Central Link

Most Central Link Light rail riders find the public announcements at the station to be helpful.



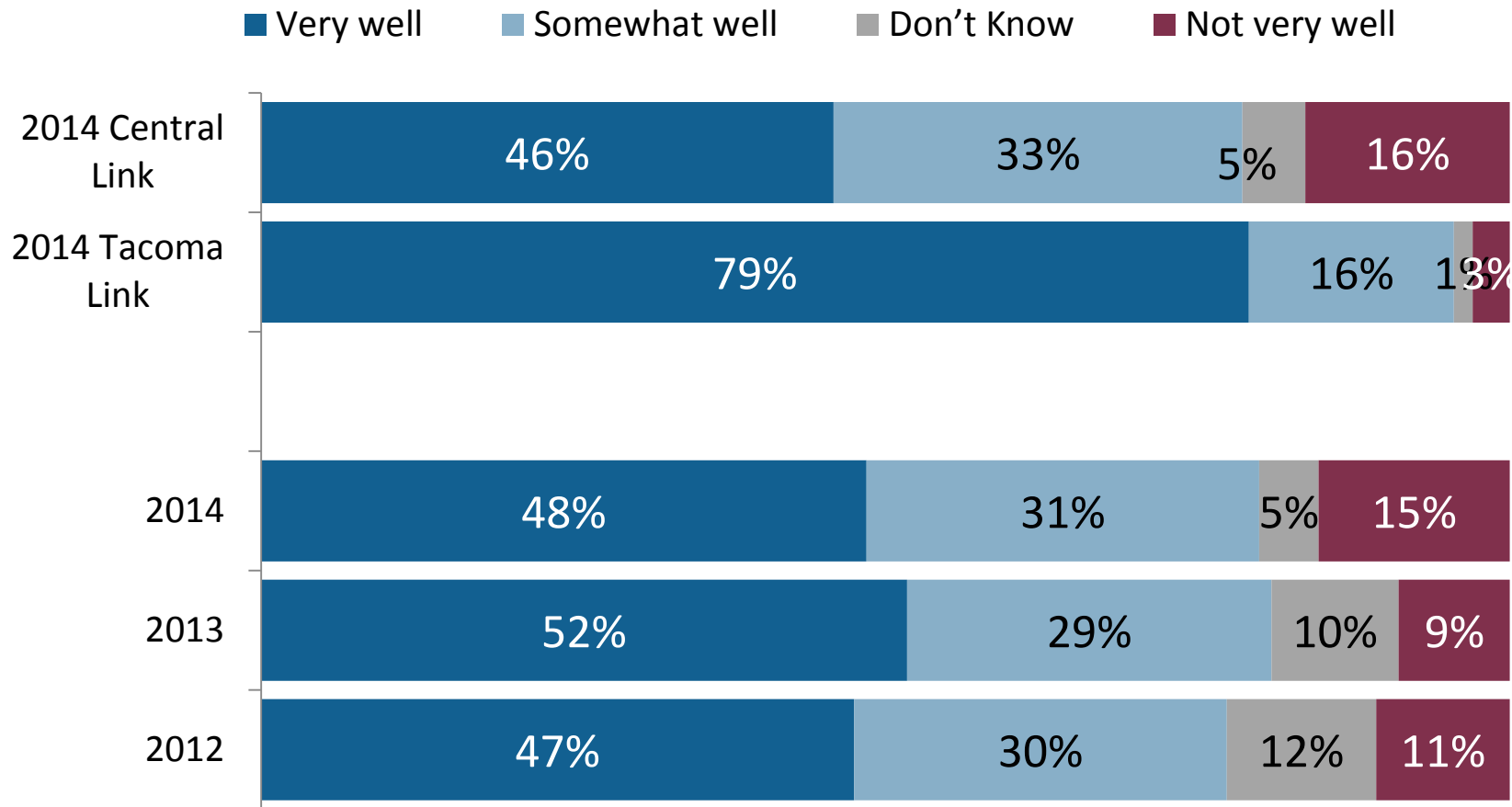
Electronic Message Boards – Central Link

Link light rail riders continue to find electronic message boards useful.



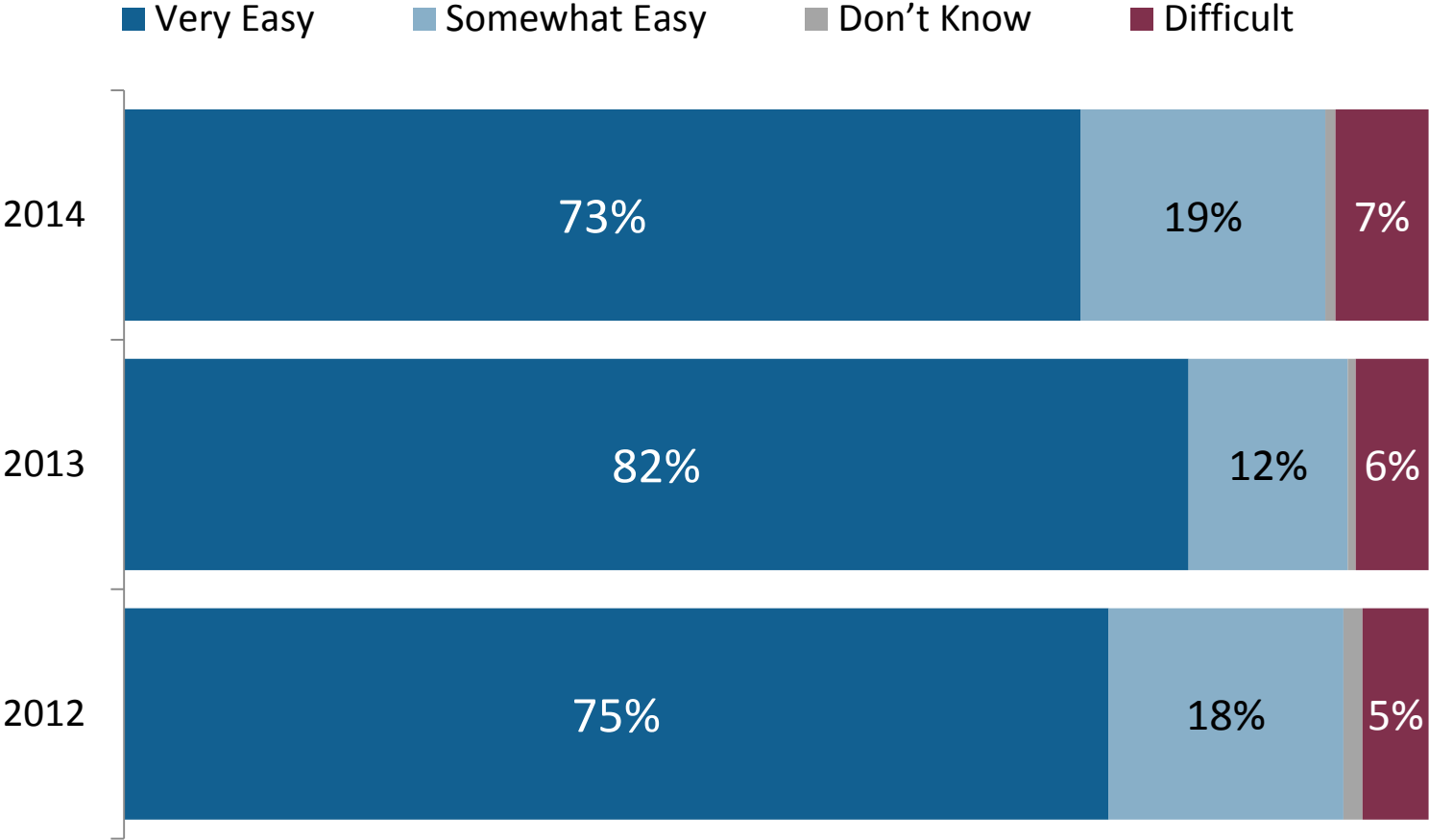
Understanding of Schedule – Link Light Rail

Understanding of the light rail schedule remains generally consistent, although there may be a slight increase in those who say they do not understand it very well.



Ease of Payment – Central Link Light Rail

Very few Central Link Light rail riders have issues paying their fare.



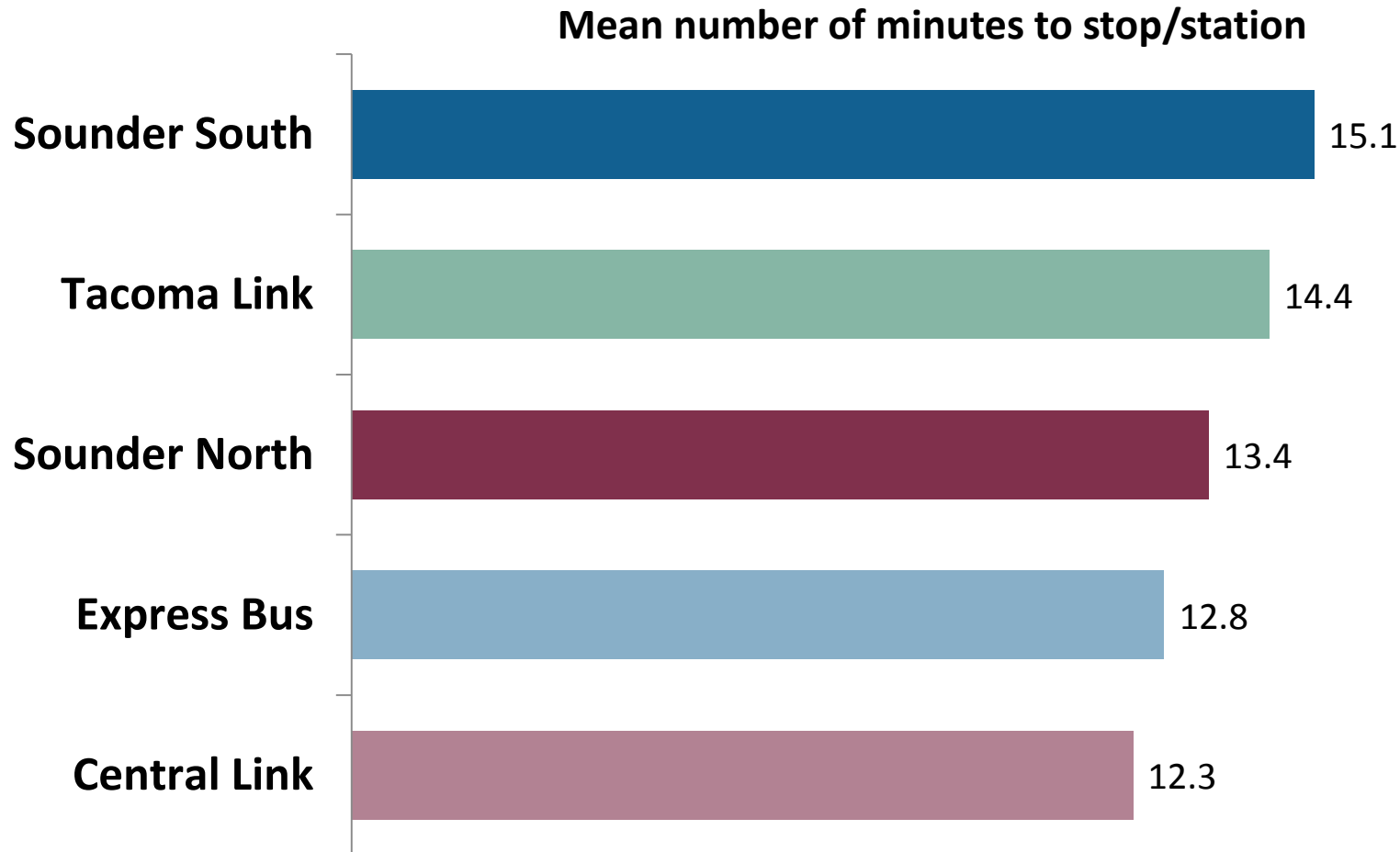
33. And is it very easy, somewhat easy, somewhat difficult, or very difficult to pay your fare on light rail?



Commute Behavior

Average Time to Stop/Station

For most ST riders, it takes an average of 12 to 15 minutes to get to the first transit stop they use. On average, Central Link riders need the least amount of time to access transit, while Sounder South riders need the most.

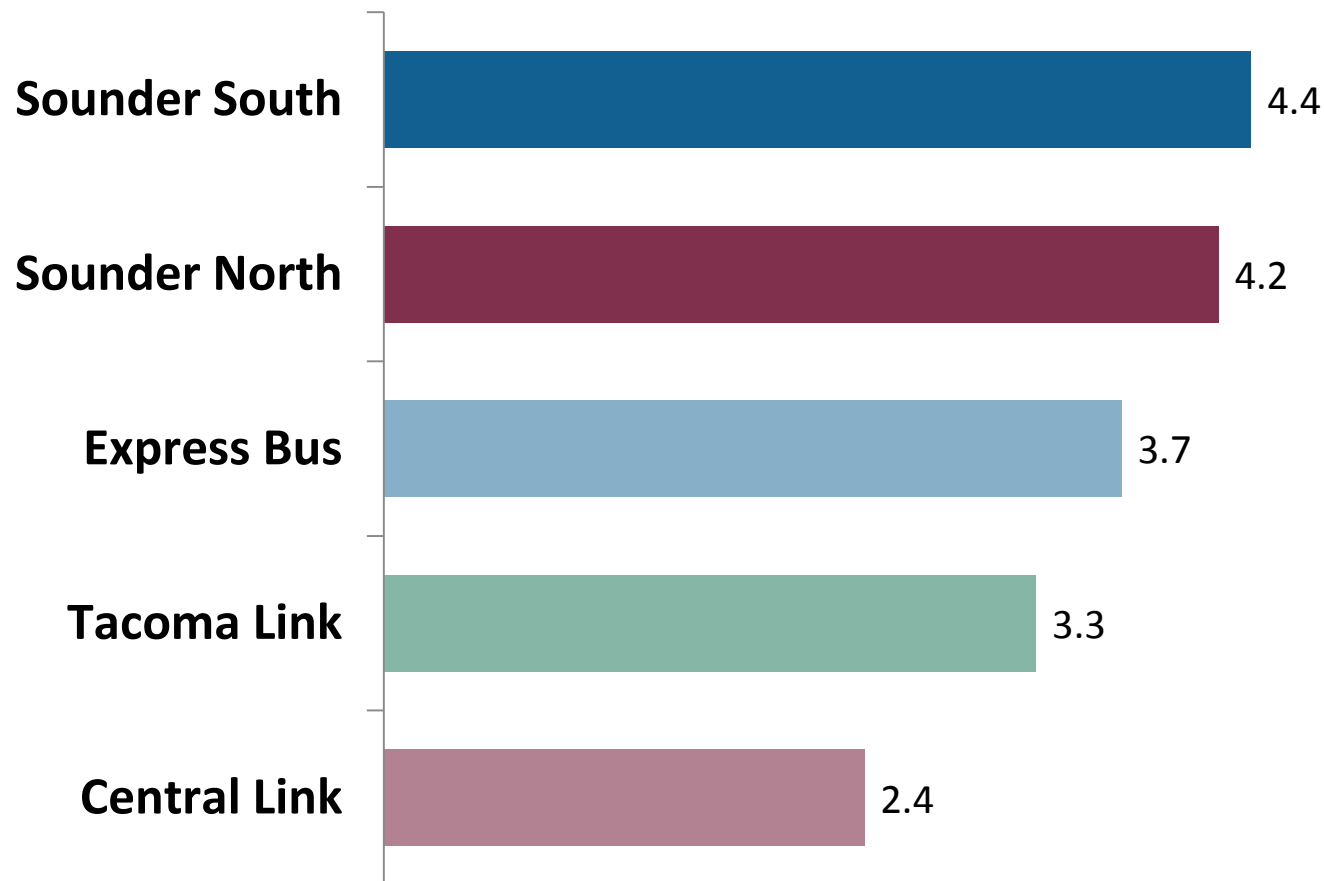


10. How many minutes does it typically take to get from your home to the first transit stop you usually use?

Frequency of Trip

Sounder riders are the most regular riders, Central Link the least.

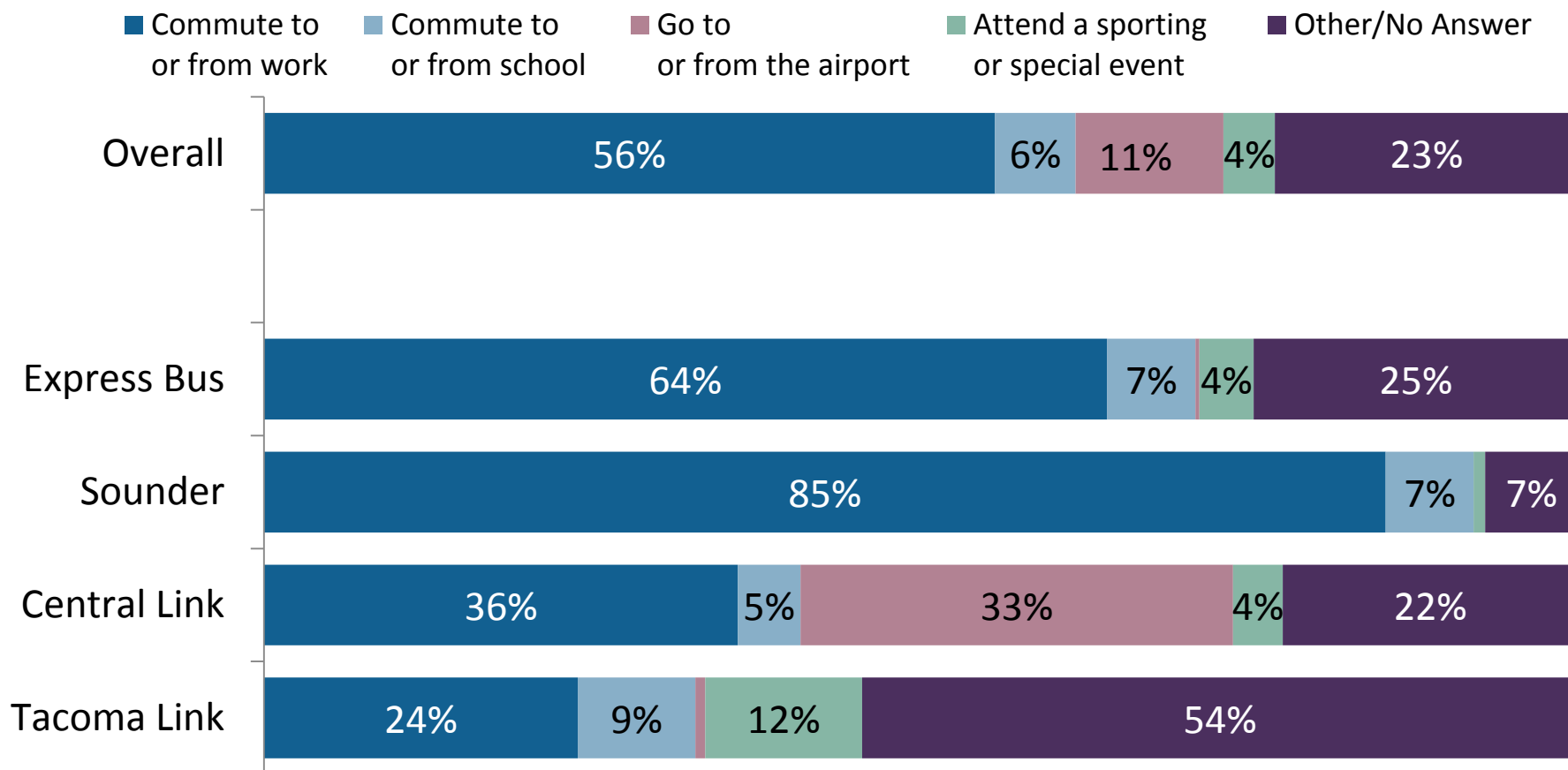
Mean number of days per week



14. In an average seven day week, how many days do you take this trip, or do you ride less than once a week?

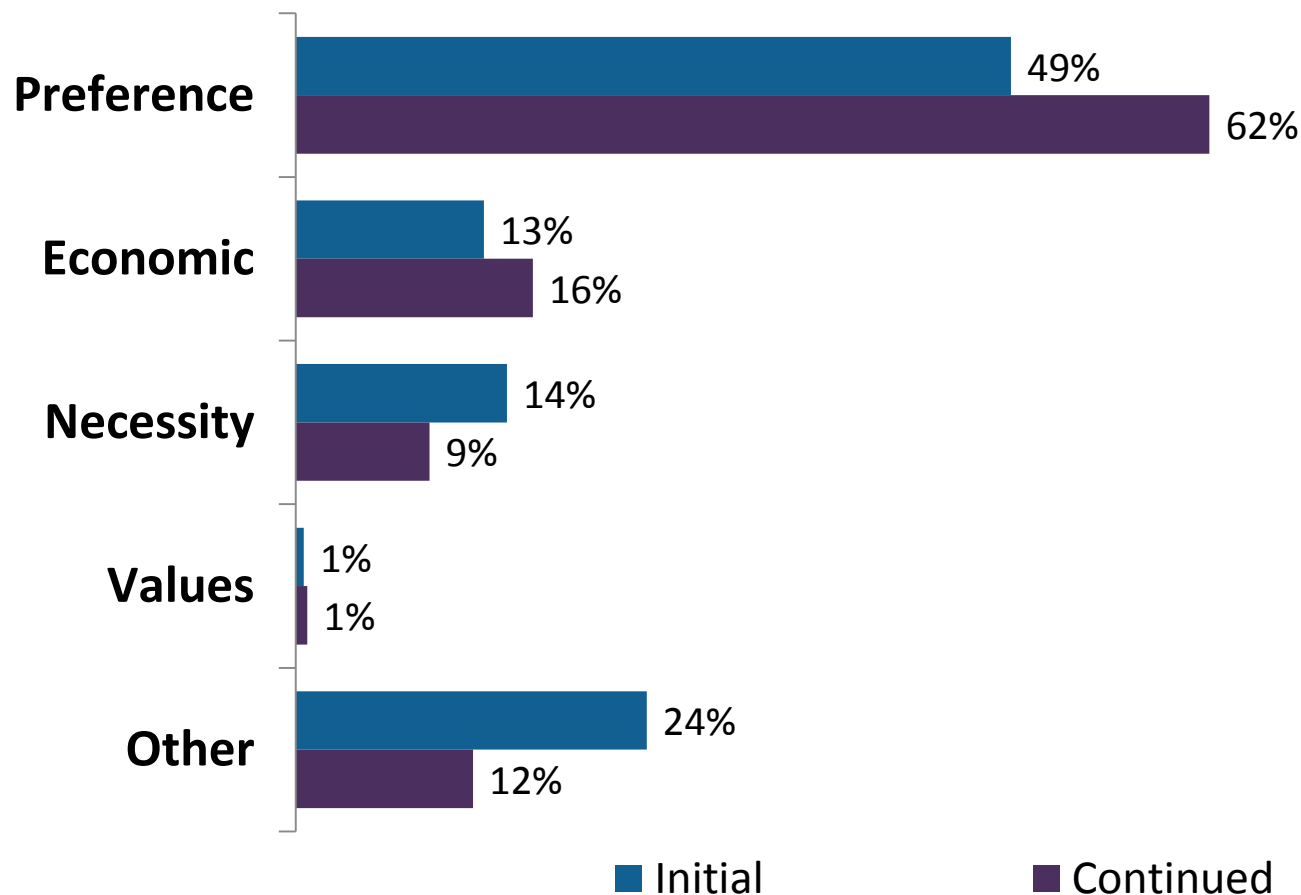
Trip Purpose

Sounder riders almost exclusively use Sounder for work commuting. A third of Central Link riders use the service to go to the airport.



Reasons for Riding – Initial & Continued

Almost half (49%) of all ST riders began riding the service for preference-related reasons. A strong majority (62%) continue to ride ST because of preference.



Q18. What are the main reasons you **originally started riding** Express Bus/Link/Sounder?

Q19. Why do you **continue to ride** Express Bus/Link/Sounder?

(multiple responses; **first** response shown)

Reasons for Riding

Convenience is the top factor convincing riders to both start and continue taking ST.

Top mentions - Initial	Overall		Express Bus	Souder	Central Link	Tacoma Link
More convenient	19%		14%	13%	27%	49%
Changed-new job/job transfer/relocated	12%		16%	20%	4%	2%
Goes to destination	11%		10%	13%	13%	10%
No car/only option	10%		14%	3%	7%	1%

Top mentions – Cont.	Overall		Express Bus	Souder	Central Link	Tacoma Link
More convenient	30%		24%	31%	36%	56%
Cheaper	12%		13%	7%	12%	7%
Faster	11%		10%	10%	14%	8%
Goes to destination	9%		9%	9%	9%	7%

Q18. What are the main reasons you **originally started** riding Souder/Express Bus/Central Link light rail/Tacoma Link light rail?

&

Q19. Why do you **continue to ride** Express Bus/Link/Souder?
(multiple responses; first response shown)



Technology and Sound Transit

Schedule & Route Information

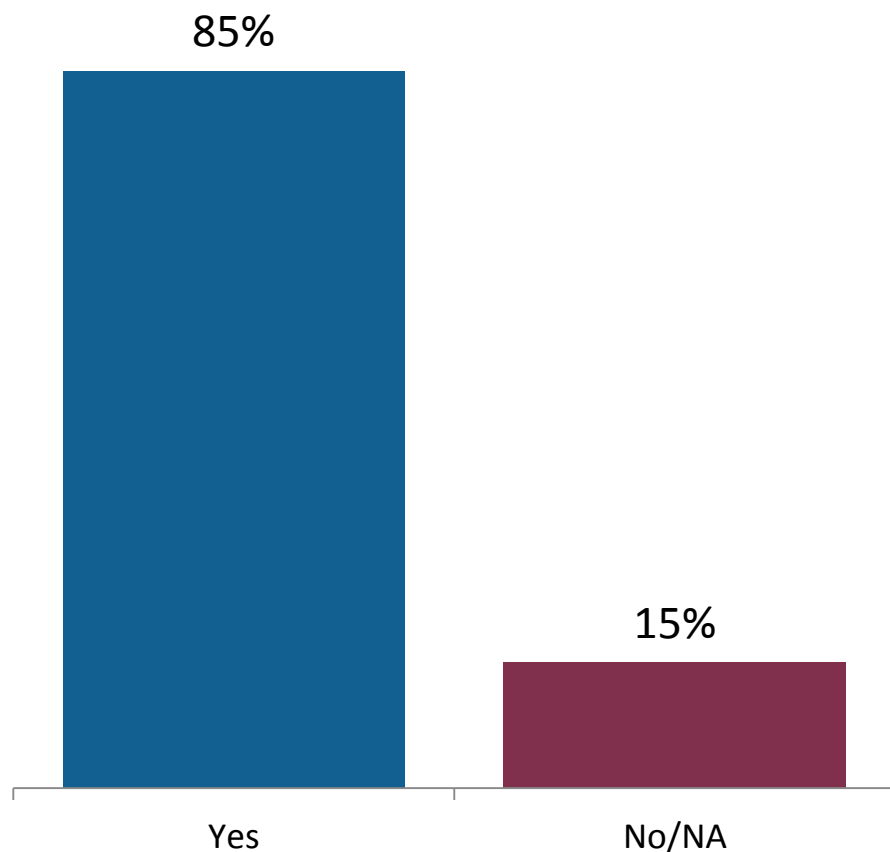
Most riders across all services get information about schedules online.

Top mentions	Overall		Express Bus	Sounder	Central Link
Online	68%		73%	81%	57%
On board/At station	13%		4%	4%	27%
Multiple	9%		12%	3%	7%
Printed schedule	6%		7%	7%	4%
Customer service phone line	1%		1%	1%	2%
Don't know/No answer	3%		2%	4%	4%

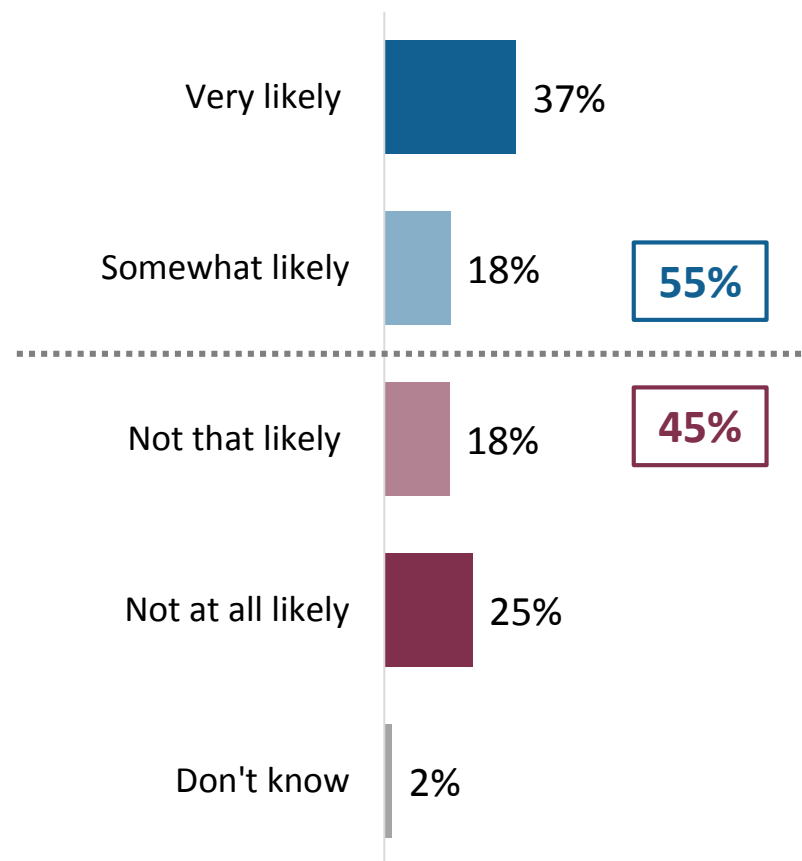
Cell Phone Usage

Most riders (85%) own smart phones. Just over half (55%) would be likely to use their smart phone to purchase a ticket if it was an option.

Own a smartphone



Buy ticket using smartphone



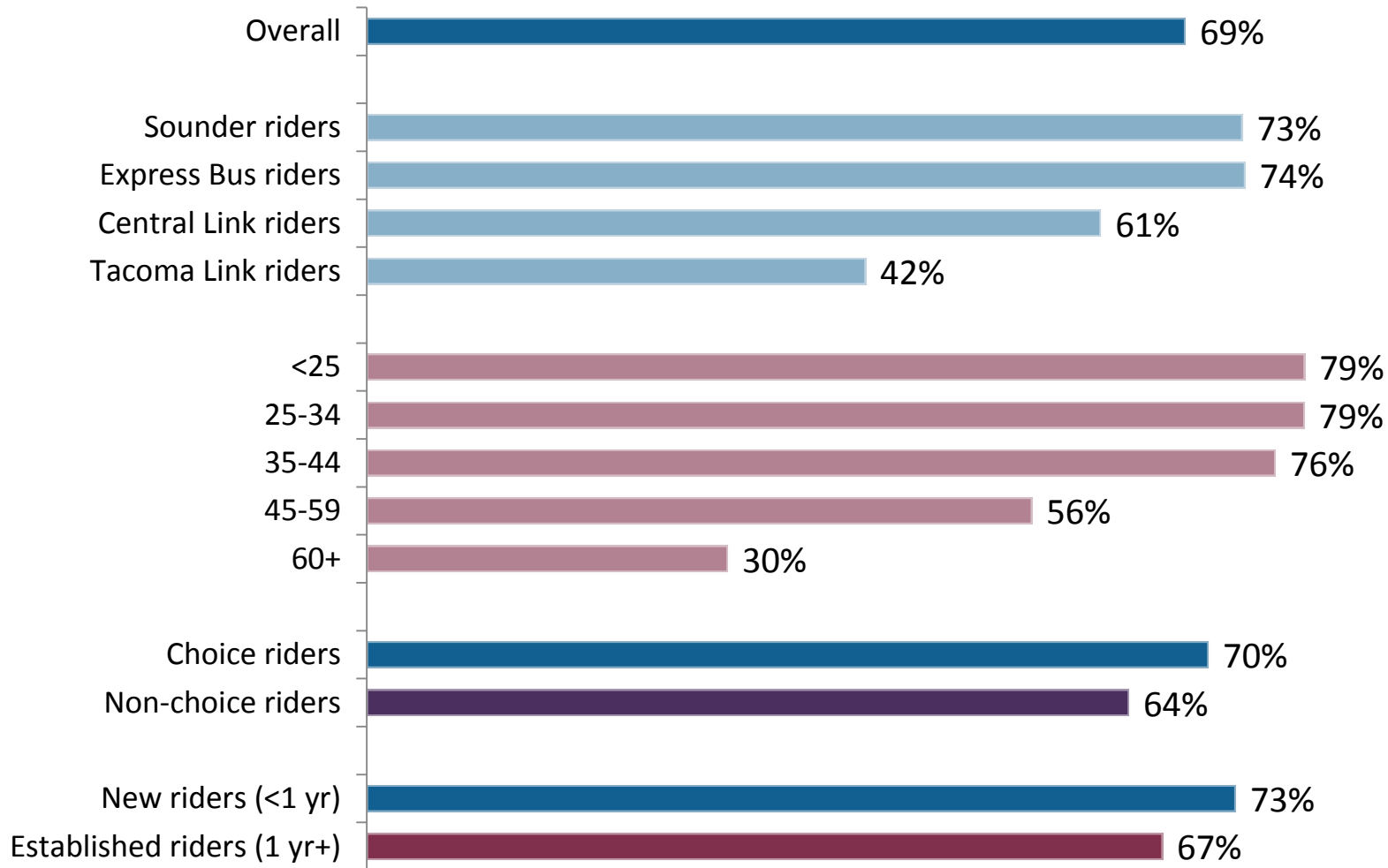
Q41. Do you own a smartphone?

Q42. If you were given the option to buy your ticket using your smartphone, how likely would you be to do so?

Mobile Access to Schedules

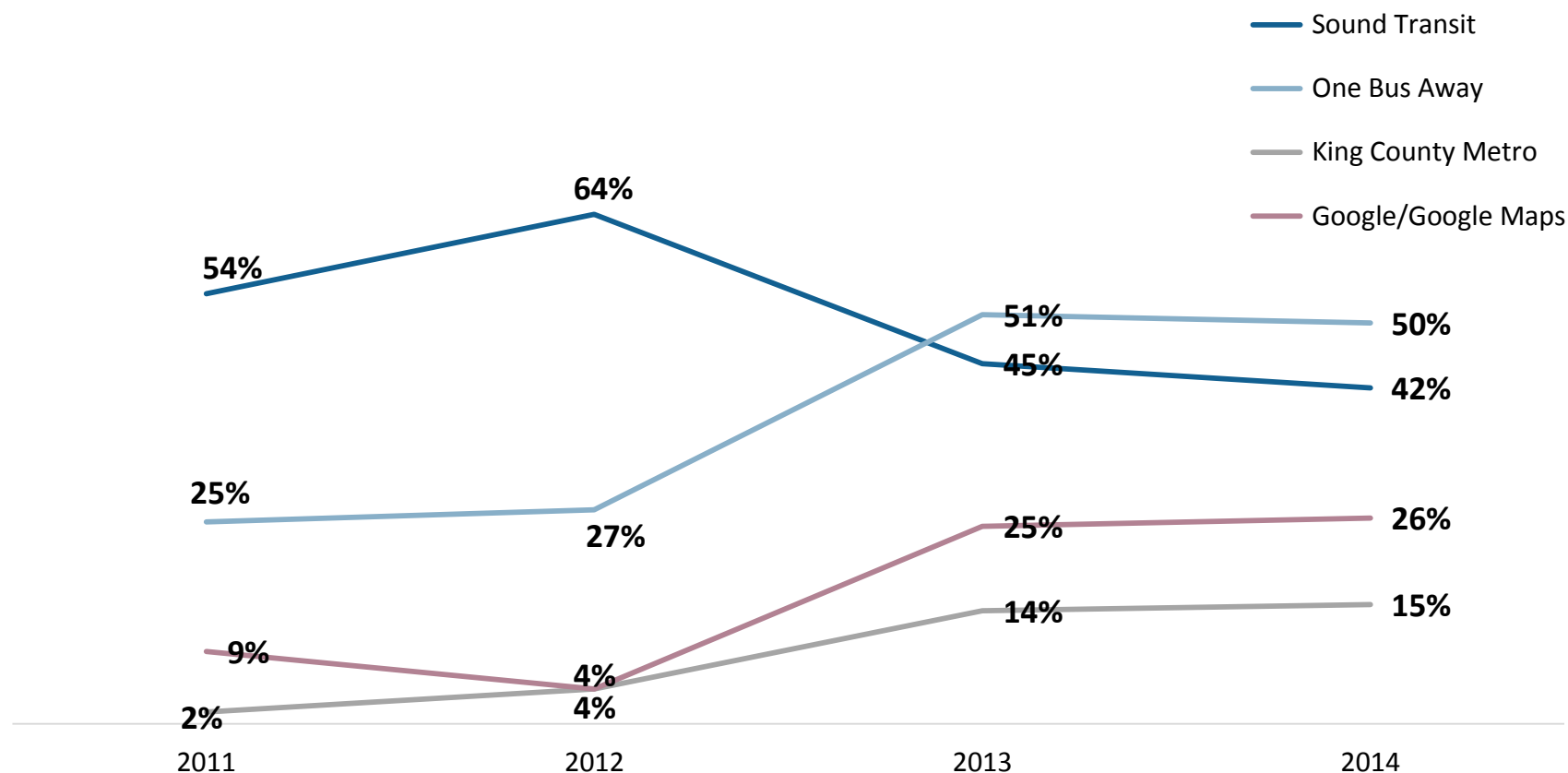
Sounder riders, Express Bus riders, younger riders, new riders and choice riders are more likely to use their cell phones to access schedules.

% of “Yes” responses by subgroup



Sources for Schedules – By Year

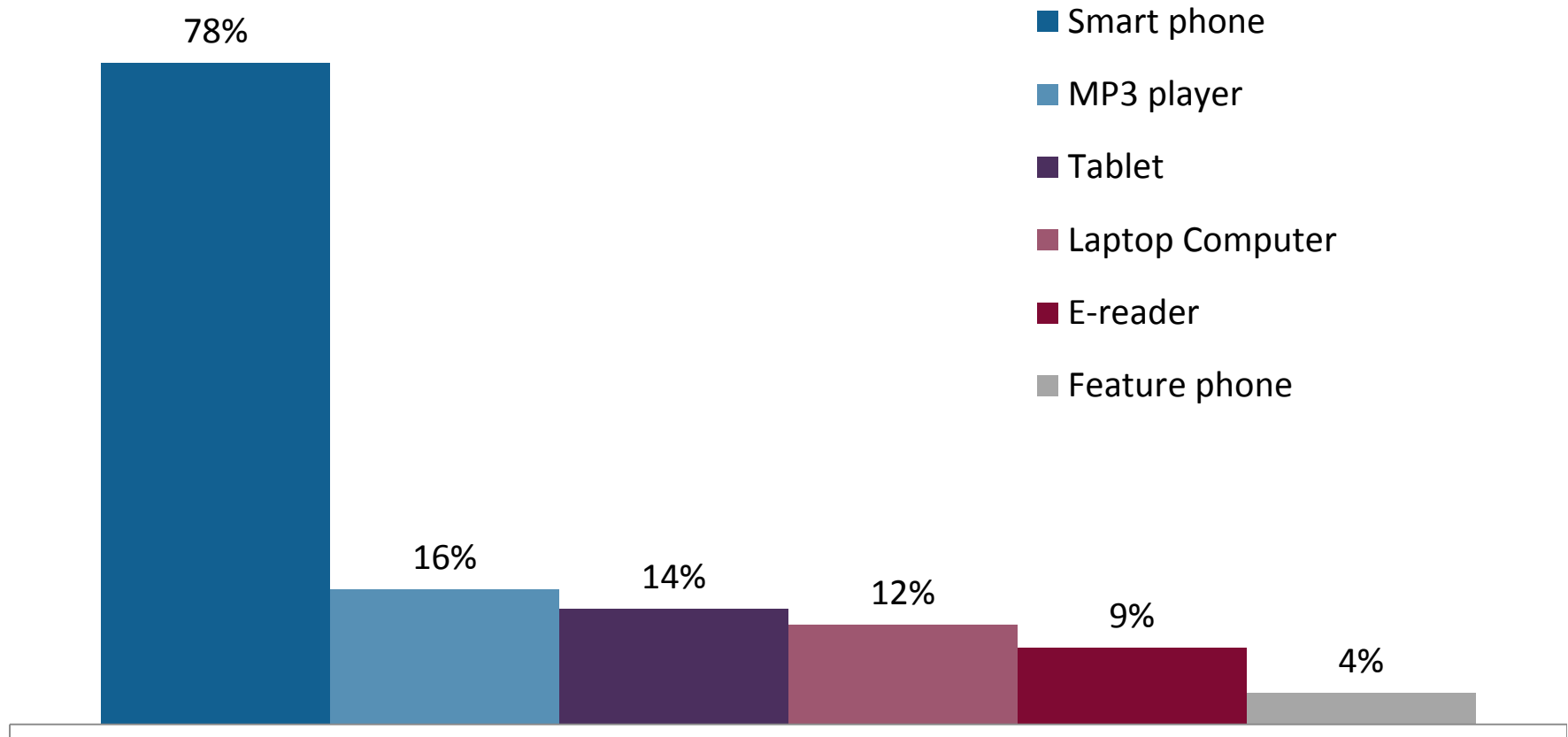
After major shifts in ST and One Bus Away app shares over the last few years, the usage shares of the major transit apps have been flat in 2014.



Q48. Which sources do you use to access schedules on your cell phone or tablet? (Multi-response)

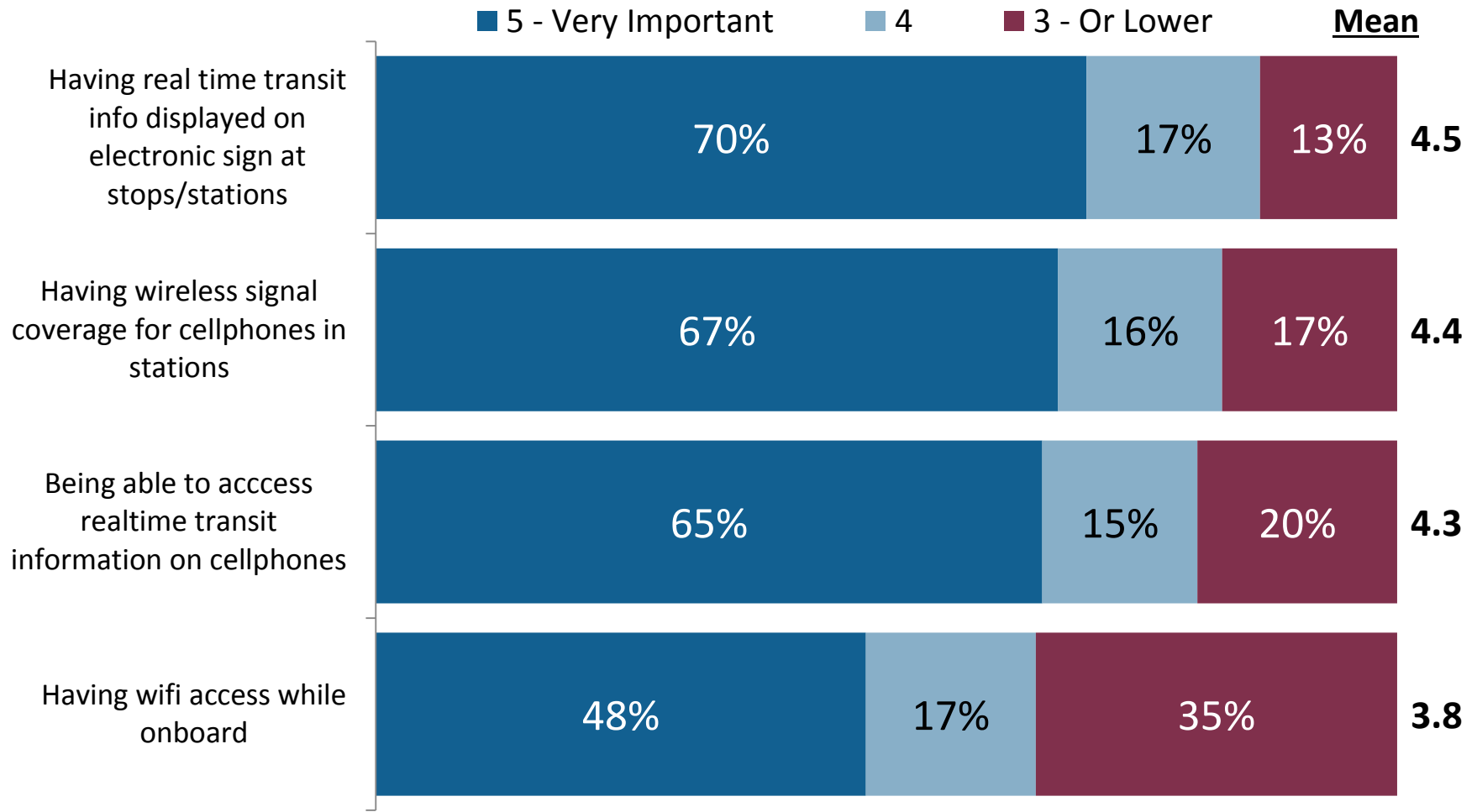
Technology Usage Onboard

Most riders members regularly use a smart phone while on a ST service.



Importance of Technology Onboard or At Stations

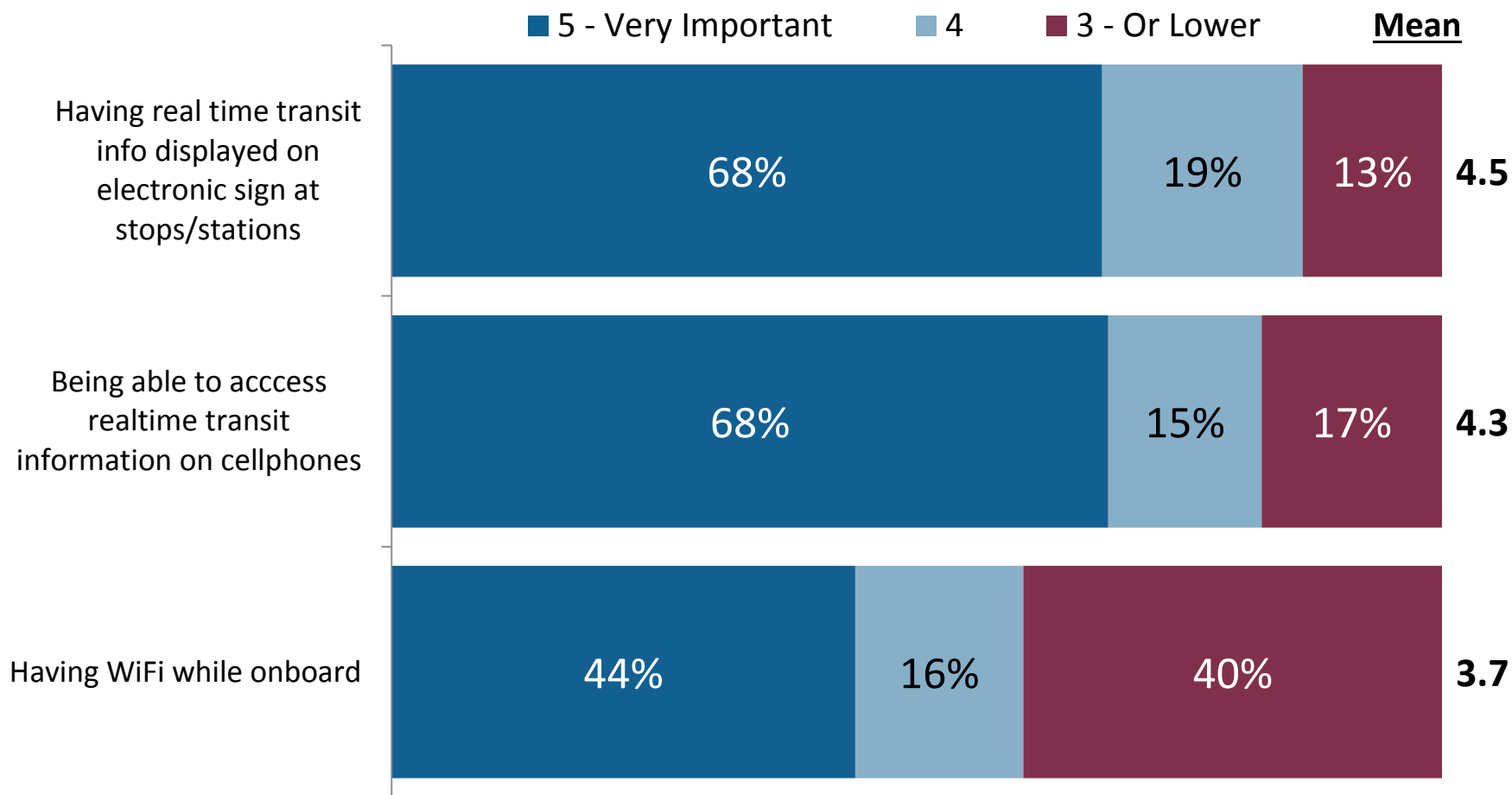
While all technological amenities appeal to riders, getting real-time updates and wi-fi service at stops and stations are clear favorites. On-board wi-fi access is less of a priority.



Q50-53. Using a scale of 1 through 5, where 1 means not at all important and 5 means very important, how important would you rate which of the following ...

Importance of Technology Onboard or At Stations - Bus

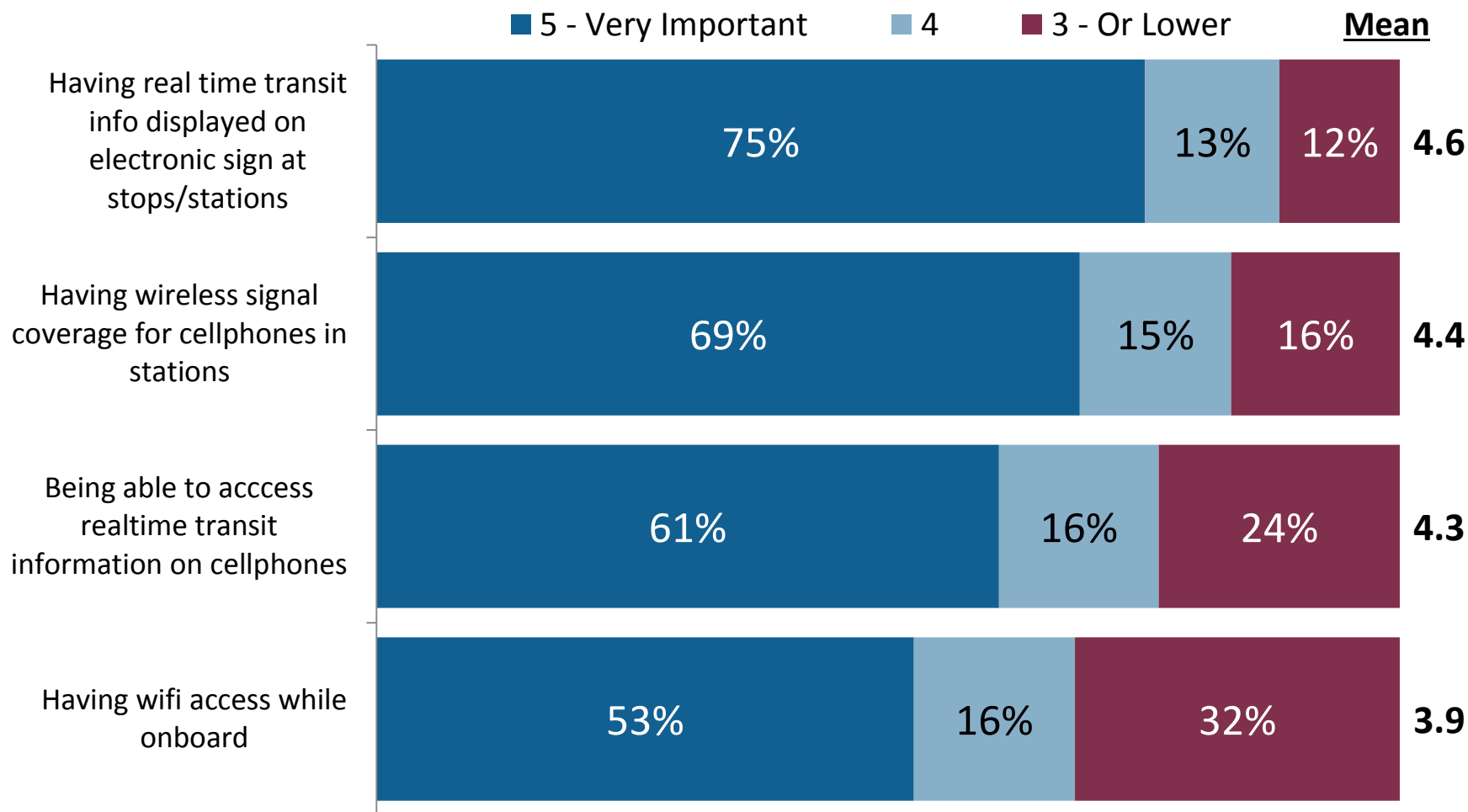
Being able to access real-time updates is equally important to Express bus riders, whether it is delivered via electronic signs at stops or via mobile sites/apps.



Q50-53 Using a scale of 1 through 5, where 1 means not at all important and 5 means very important, how important would you rate which of the following ...(n=536)

Importance of Technology Onboard or At Stations – Central Link

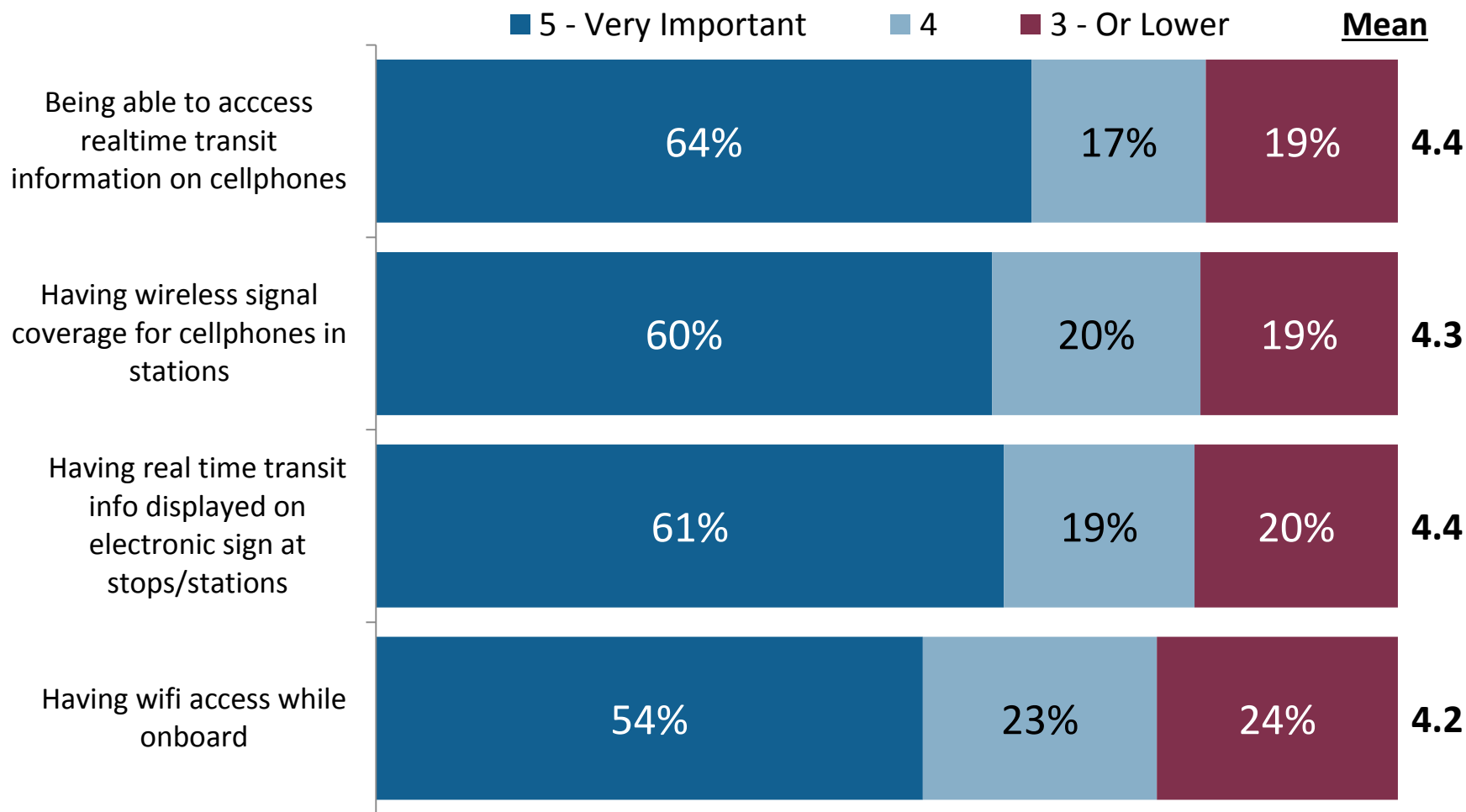
Central Link light rail riders are most interested in having real-time transit information posted at stops and stations.



Q50-53. Using a scale of 1 through 5, where 1 means not at all important and 5 means very important, how important would you rate which of the following ... (n=284)

Importance of Technology Onboard or At Stations – Sounder

Sounder riders place a high priority on all technology improvements in roughly equal measure.

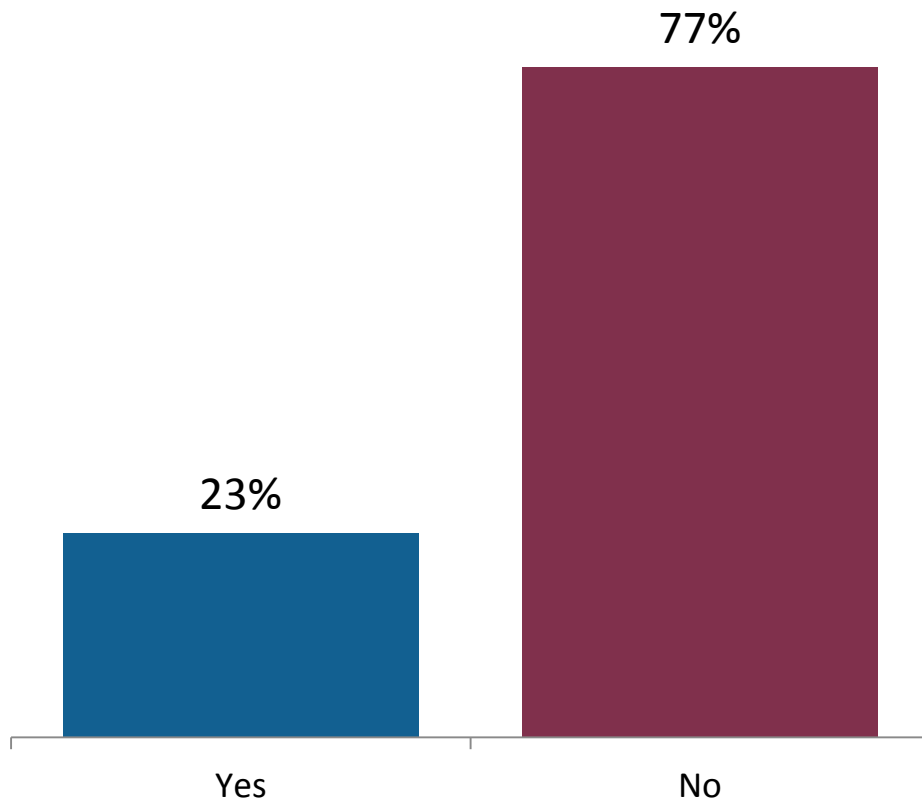


Q50-53. Using a scale of 1 through 5, where 1 means not at all important and 5 means very important, how important would you rate which of the following ...(n=394)

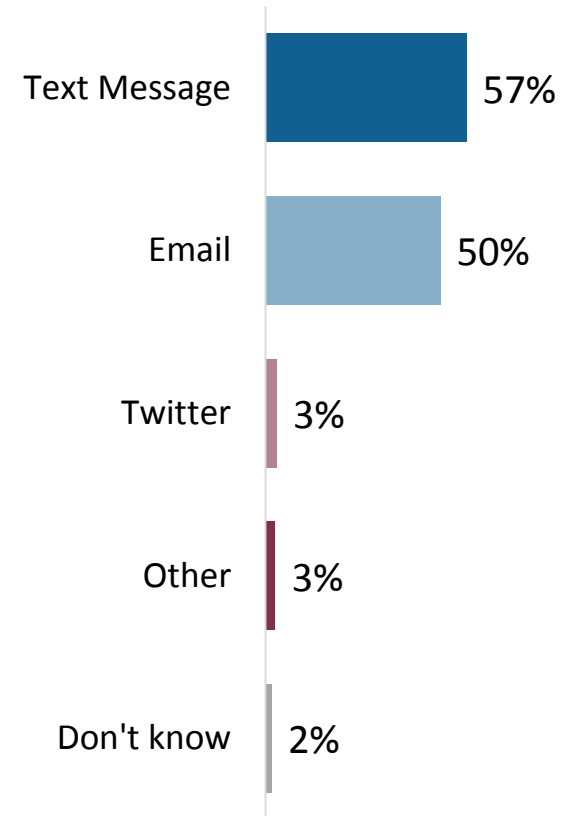
Rider Alerts

Less than a quarter of all riders subscribe to Rider Alerts. For those who do subscribe, they overwhelmingly receive the alerts via text messages or emails.

Rider Alerts



How do you receive Rider Alerts?



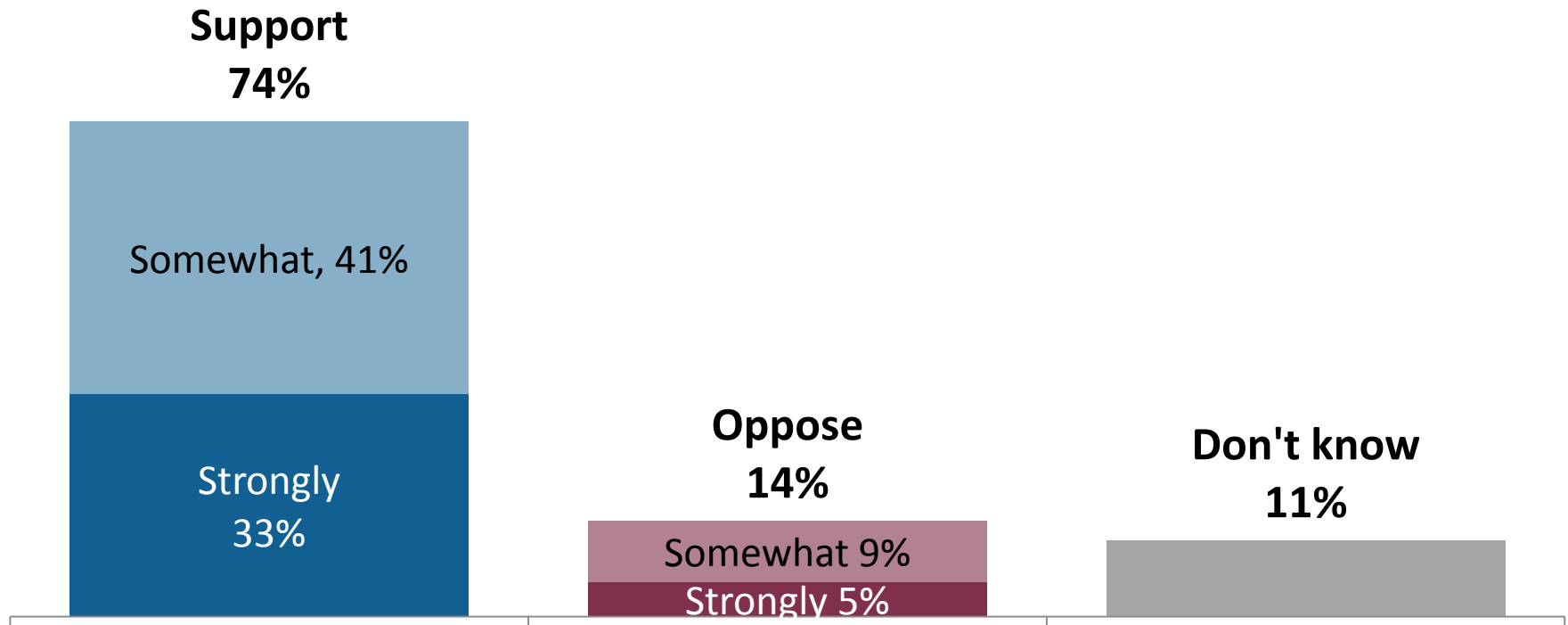
Q43. Do you subscribe to Sound Transit Rider Alerts?

Q44. How do you receive rider alerts? (Multi-response)

Issues environment

Support for Expansion of Service – Overall

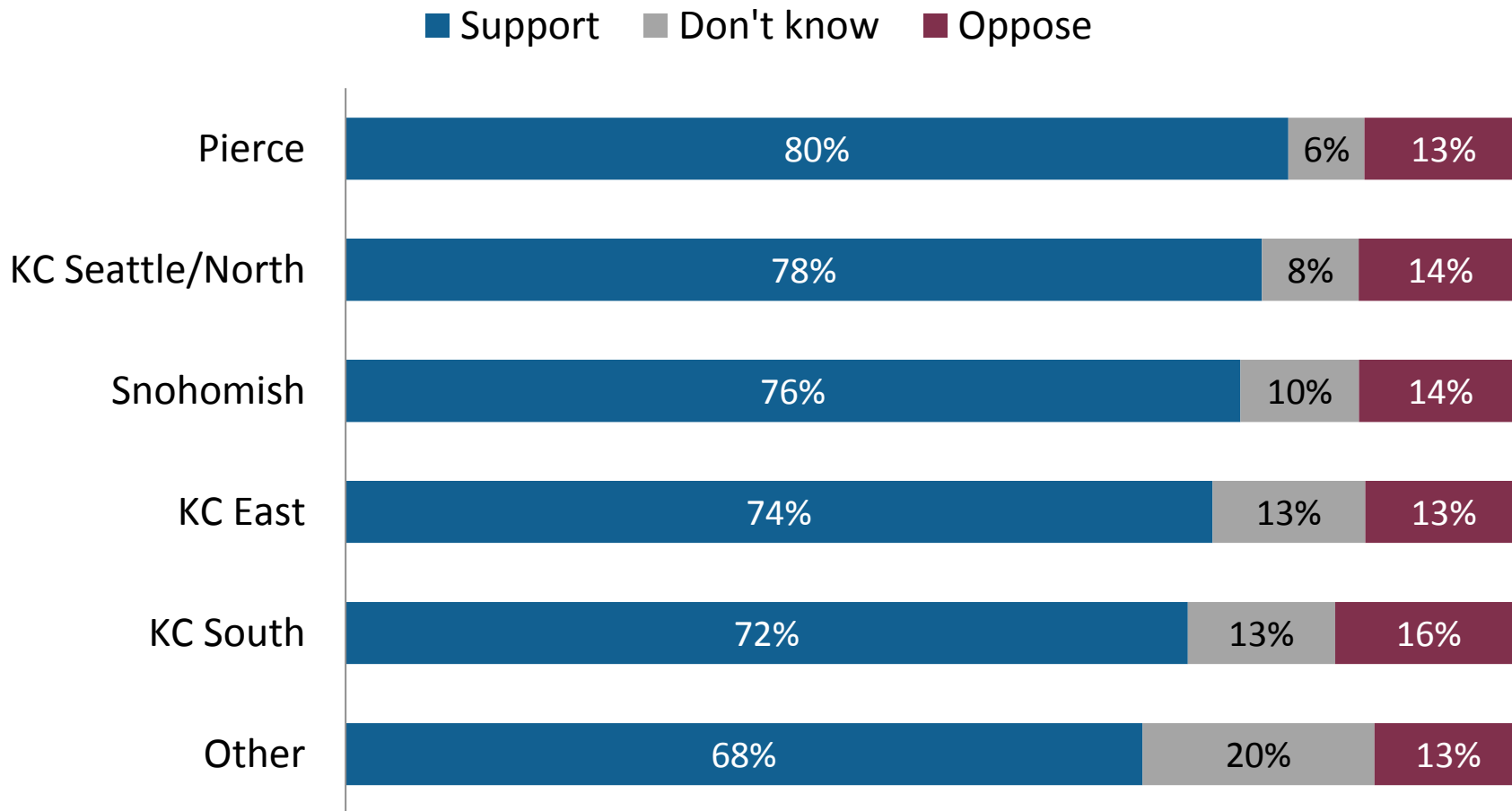
Support for transit expansion is high, with three quarters of riders claiming they would support new taxes to expand transit.



Q54. In general, do you strongly favor, somewhat favor, somewhat oppose or strongly oppose additional taxes for further expansion of the regional transit system?

Favor Expansion of Service – Overall

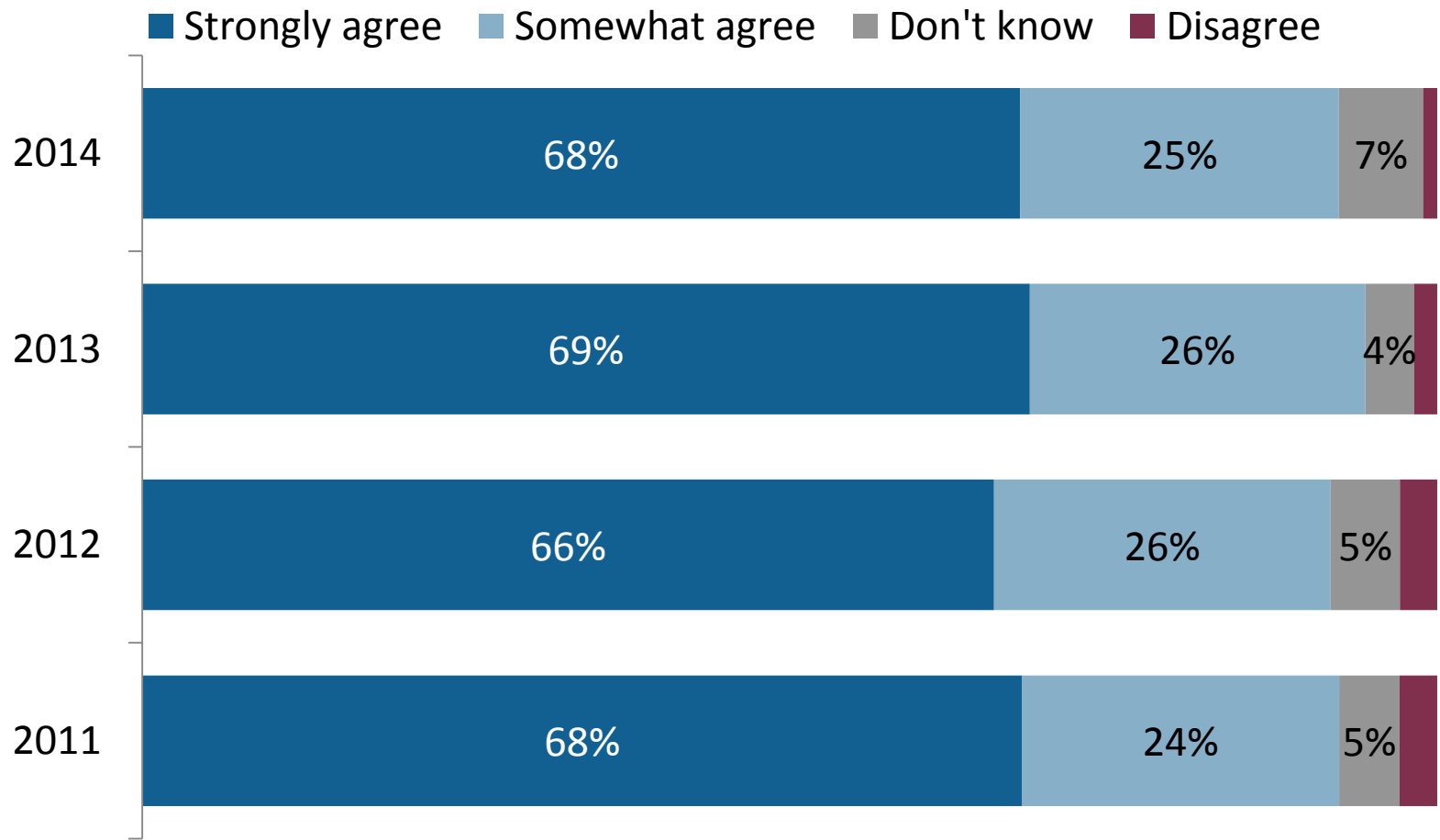
Support for transit is high throughout the ST service area.



Q54. In general, do you strongly favor, somewhat favor, somewhat oppose or strongly oppose additional taxes for further expansion of the regional transit system?

Environmental Benefits – By Year

Riders have the same attitude about the environmental benefits of transit as they have in the past, with most agreeing transit use helps the environment.



Q20. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statement: riding this bus/train is a great way for me to help the environment.

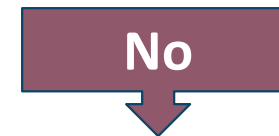


Choice Riders

Choice Rider Definition & Methodology

- ▶ The Choice Rider survey was conducted in tandem with the Customer Satisfaction intercept survey.
- ▶ A total of 329 interviews were conducted between November 12th and December 21st 2014.
- ▶ *To ensure all respondents are part of this Choice Rider subgroup, they were screened based on the following criteria...*

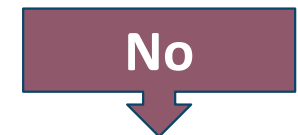
Did you have a car available that you could have used for this trip?



Have you sold a car or chosen not to buy a car because you prefer public transit?



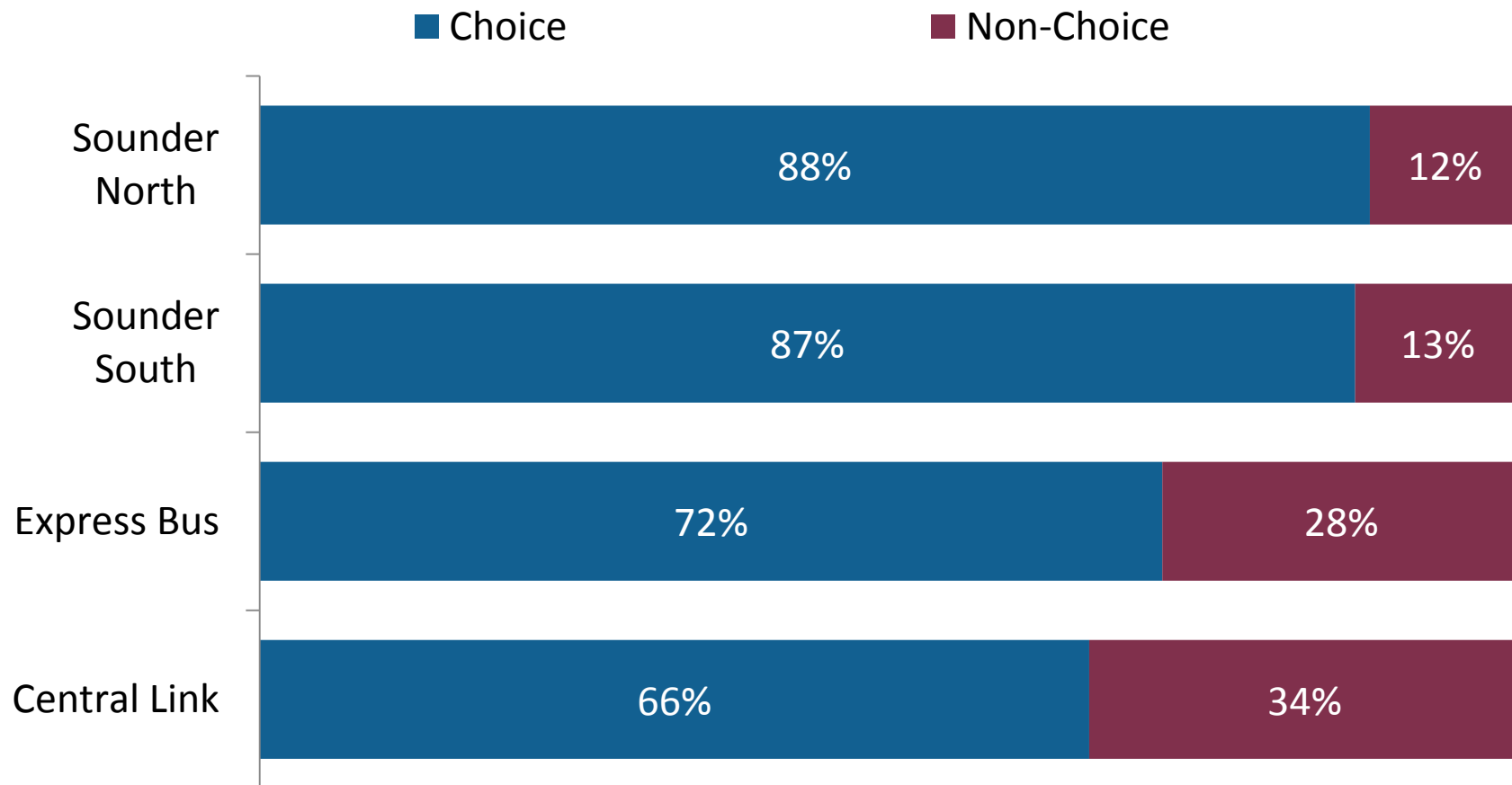
Choice Rider



Non-Choice
(Terminated out of Survey)

Choice Riders by Service (Customer Survey)

Most riders use ST as a matter of preference. A third of Central Link riders ride the service as a matter of necessity.



Q4. Did you have a car available that you could have used for this trip?

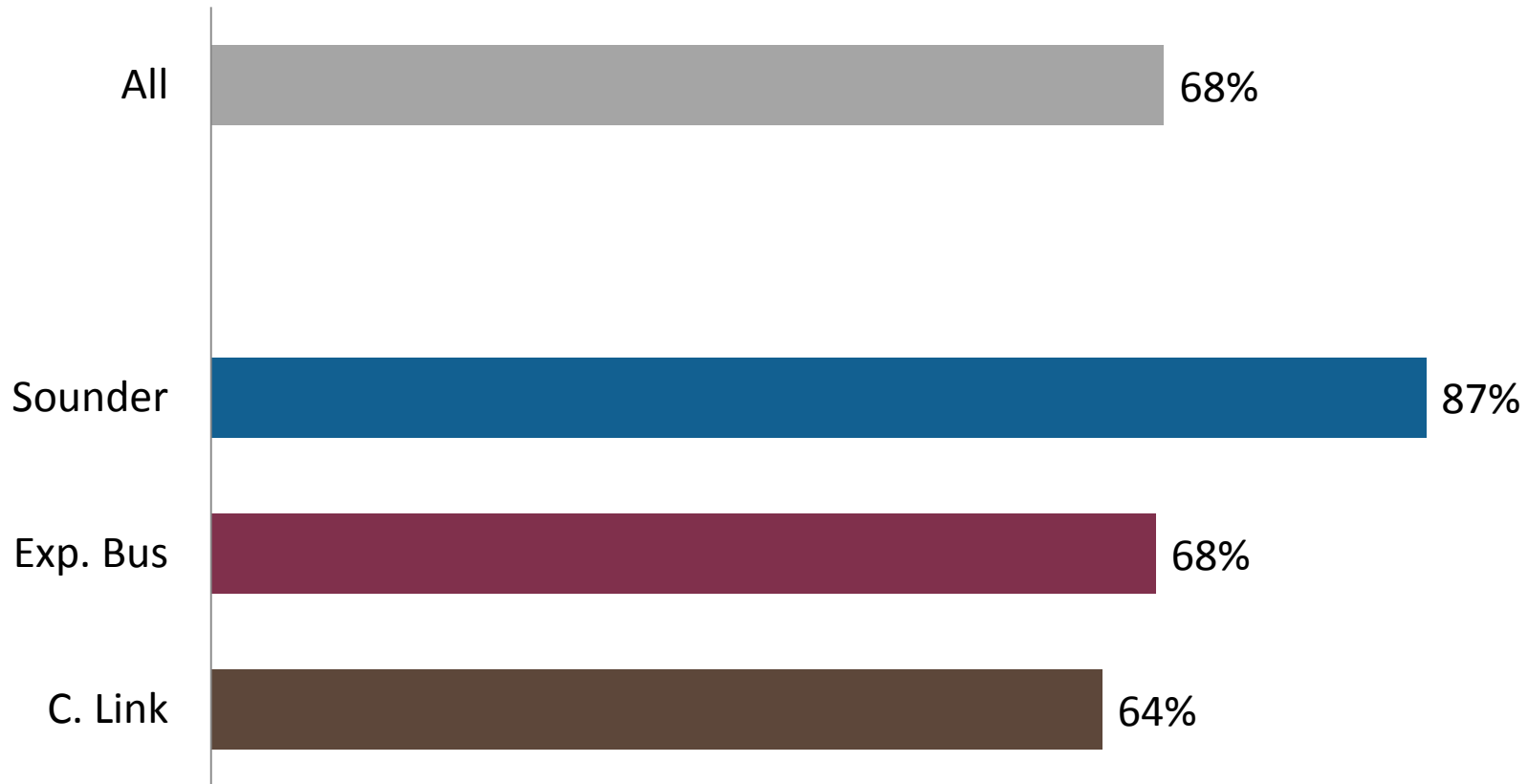
Q5. [IF Q4 is 'NO'] Have you sold a car or chosen not to buy a car because you prefer public transit?

Choice rider if 'YES' to either Q4 or Q5; Non-choice if 'NO' to both

% of Choice Riders with a Car (Choice Survey)

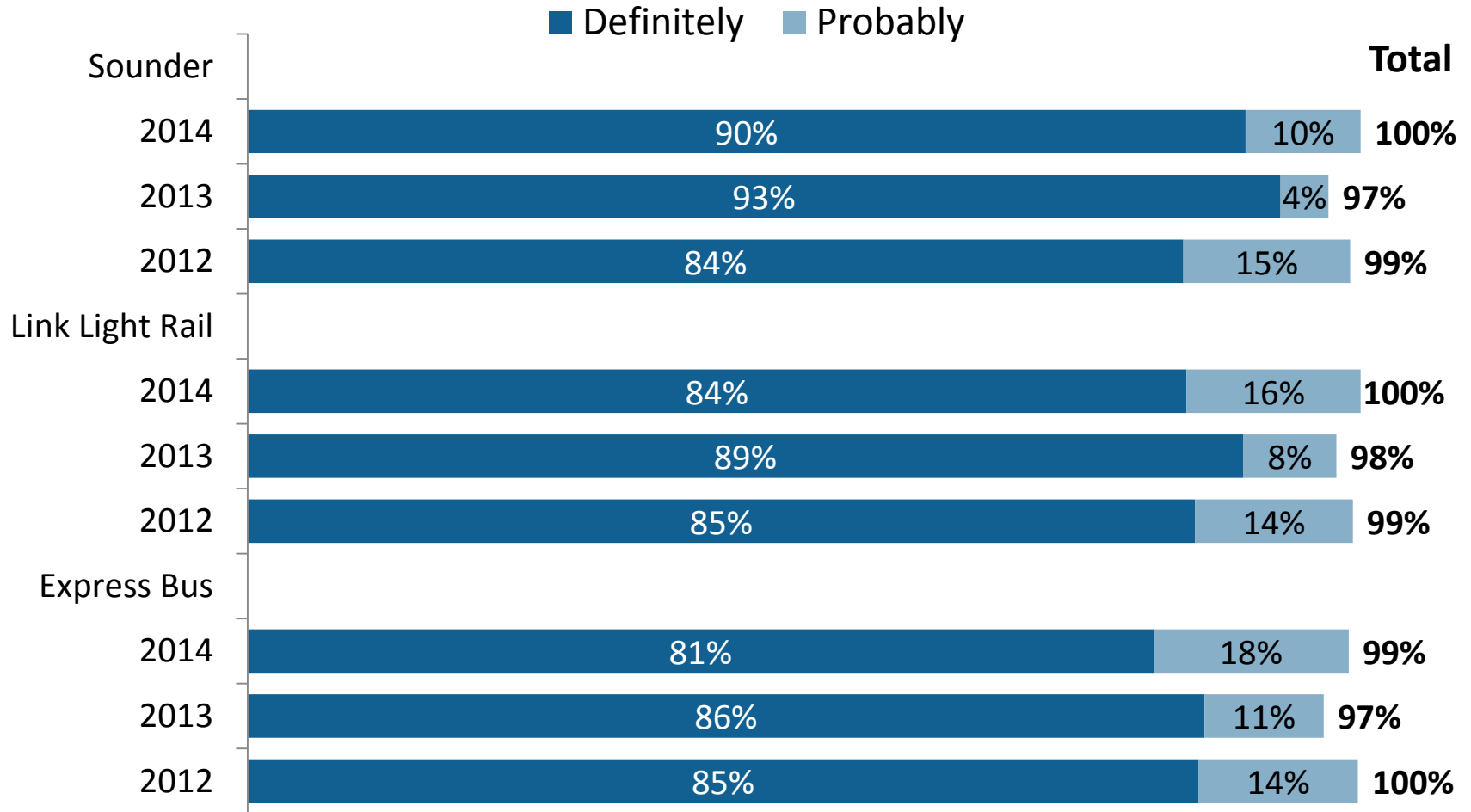
Most Choice riders do own a car, and have chosen not to use it to commute.

'Yes' % Overall and by Service



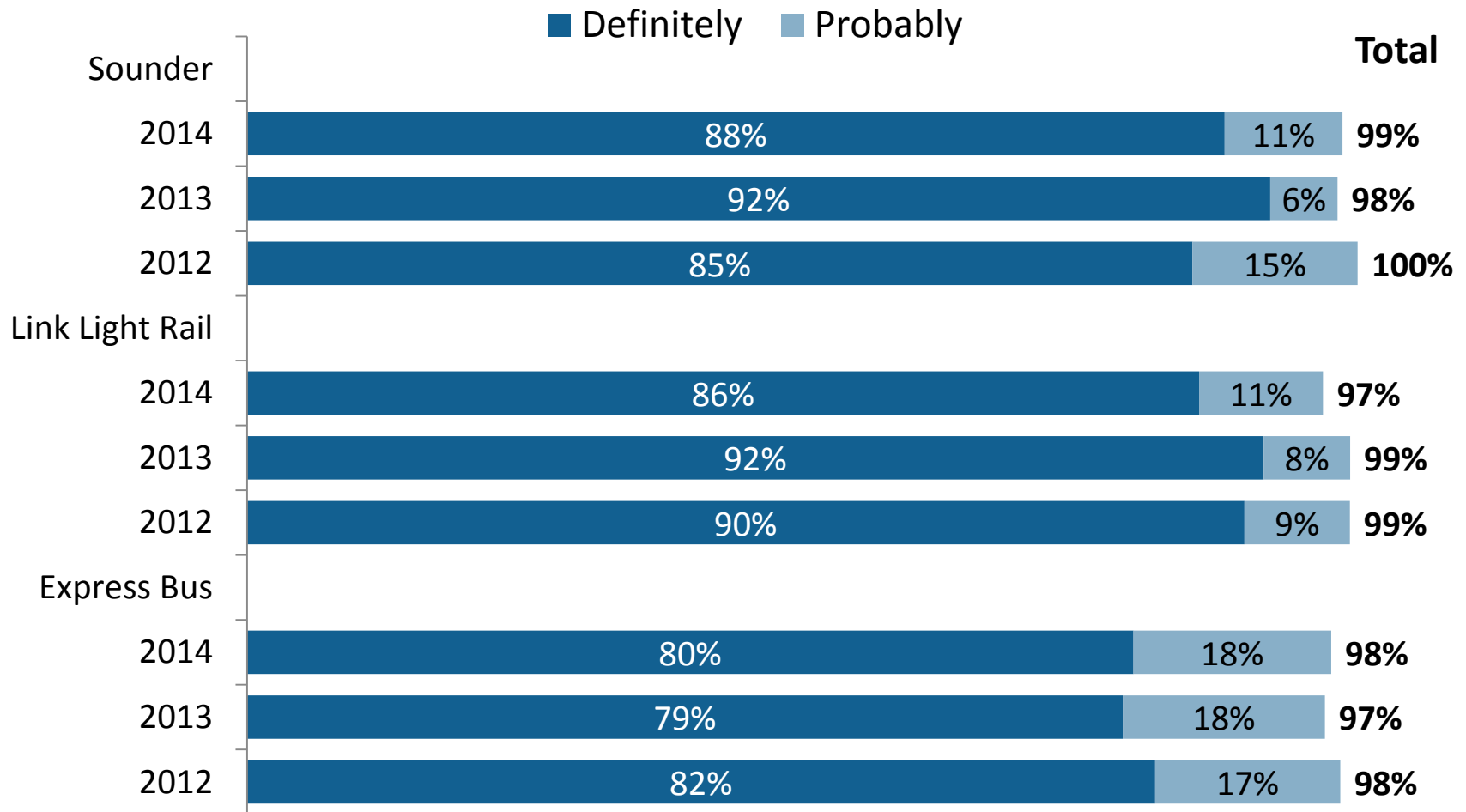
Continue Using Sound Transit

Virtually all ST choice riders plan to continue to ride ST.



Recommend Using Sound Transit

Virtually all choice riders would recommend their service to someone else.



Q31. How likely would you be to **recommend** (this service) to a family member, friend or co-worker?

ST Advertising Source Recall – Year by Year

Most choice riders recall seeing ST advertising onboard. A third can't recall seeing anything recently.

Source of Advertising	Overall 2014	Overall 2013	Overall 2012
On board buses/trains	36%	29%	31%
Television	18%	20%	20%
Radio	6%	6%	15%
Newspaper	2%	2%	3%
Not sure/Can't recall	16%	32%	13%
None	29%	16%	29%

Q24. What Sound Transit advertising have you seen or heard recently?
(multiple responses; all responses shown)

ST Advertising Content Recall – Year by Year

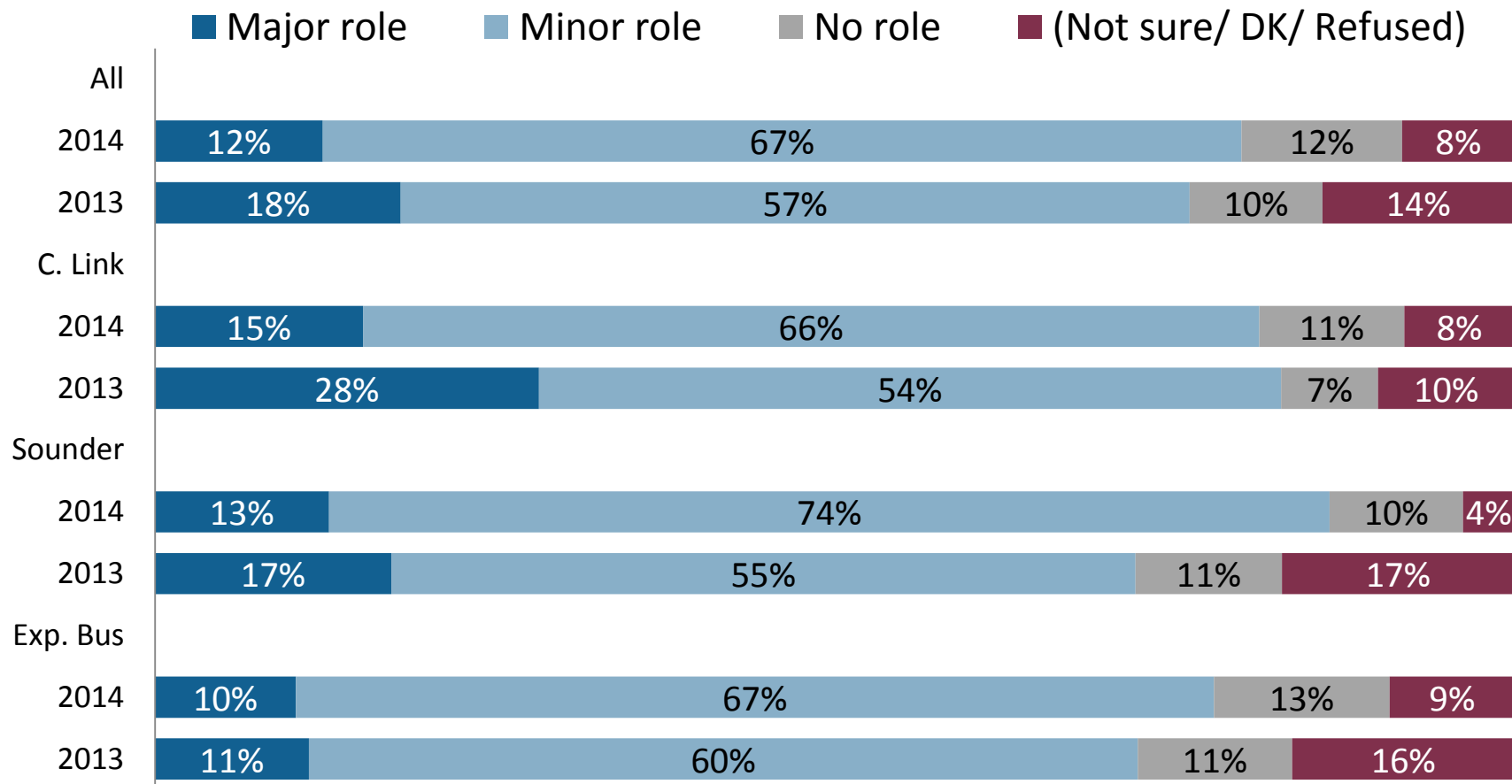
For the most part, choice riders recollection of ST advertising is consistent with years past. However, a few new ideas emerged in 2014. A handful of riders mentioned hearing about light rail expansion.

Top Mentions	Overall 2014	Overall 2013	Overall 2012
Voice of reason/old lady	21%	17%	21%
Ride the wave	5%	3%	7%
Sound Transit ad/logo	5%	2%	5%
Convenient/easy	3%	2%	2%
Stress free/relax (no traffic)	3%	3%	5%
Light Rail/Light Rail Expansion	3%	-	-
Save gas	2%	2%	3%
Tweeting	2%	-	-
Choices/Best Choice	2%	-	-
Transit Mother/Fairy/Lady	1%	-	-
Not being able to let go of car	1%	-	-
Cheetah/Fast	1%	-	-
Can do other things, read	1%	2%	3%

Q25. Please describe the topics, message, or characters in the advertising you saw or heard. (multiple responses; all responses shown)

Perceived ST Advertising Impact

Perceptions of advertising impact remains consistent with years past. The majority think advertising plays a minor role in someone else's decision to start riding transit.



Q27. And do you think Sound Transit's advertising plays a major role, a minor role, or no role in someone else's decision to start riding transit?

Best Improvement Forced Choice – by Service

More frequent service and expanded parking make up the largest improvement suggestions across all services. Requests for these are drastically higher among Sounder riders, where a strong majority would like more service (65%) and more park & ride spaces (50%).

Top Mentions	Overall	Exp. Bus	Sounder	C. Link
More frequent service	34%	35%	65%	22%
More park and ride spaces	27%	21%	50%	31%
Better coordination between routes and transfers	16%	20%	21%	8%
Concession, newspaper or food stands at stations	14%	12%	11%	19%
More signal priority for transit to make the ride faster	14%	11%	19%	18%
More destinations/expand service area	4%	2%	0%	8%
Bathrooms	3%	4%	-	3%
Wi-Fi	2%	4%	-	1%
More Space	2%	4%	-	-
Extended/Weekend Service	1%	-	3%	1%
All Other	5%	5%	4%	5%

Q28. Which of the following do you think would be the best improvement that could be made to Sound Transit services? (multiple responses; all responses shown)

Contacts



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