



2018 Sound Transit Customer Satisfaction Survey Results

DRAFT *March 2019*

- ▶ These results are the 2018 measurements for Sound Transit customer satisfaction. Where possible, results are compared to previous surveys conducted in 2006 – 2017.
- ▶ A total of 1,876 interviews were conducted system-wide between November 27th and December 22nd 2018 based on the size and frequency of routes.
- ▶ Interviews were conducted with riders in person with professional interviewers via electronic tablets on board Sound Transit’s systemwide routes and services.
- ▶ 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.
- ▶ The weighted n for the overall results in this report is 870 with a weighted margin of error of $\pm 3.3\%$.

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Express bus: (n=687, MoE $\pm 3.7\%$)	79%	78%	78%	63%	56%	57%	55%	55%	54%	52%	42%	40%	38%
Link: (n=443, MoE $\pm 4.7\%$)	-	-	-	22%	28%	29%	31%	32%	34%	33%	46%	48%	51%
Sounder: (n=586, MoE $\pm 4.0\%$)	14%	15%	16%	11%	12%	11%	10%	10%	10%	12%	9%	9%	10%
Tacoma Link: (n=160, MoE $\pm 7.7\%$)	7%	7%	6%	4%	4%	4%	4%	3%	3%	3%	2%	2%	2%

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

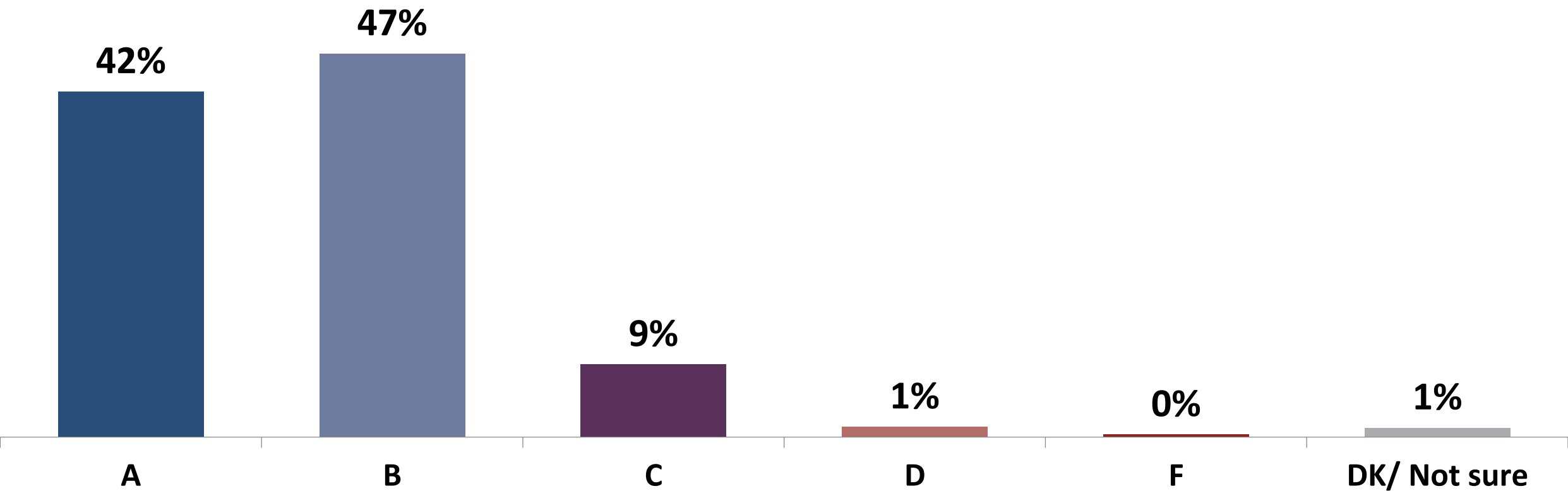


Agency & Service Grades: Overall Riders

2018 Sound Transit Grade Breakdown

Nine-in-ten give Sound Transit a positive grade, with nearly half giving the agency a B grade and two-fifths an A grade. One-in-ten give the agency a C grade with few rating it negatively.

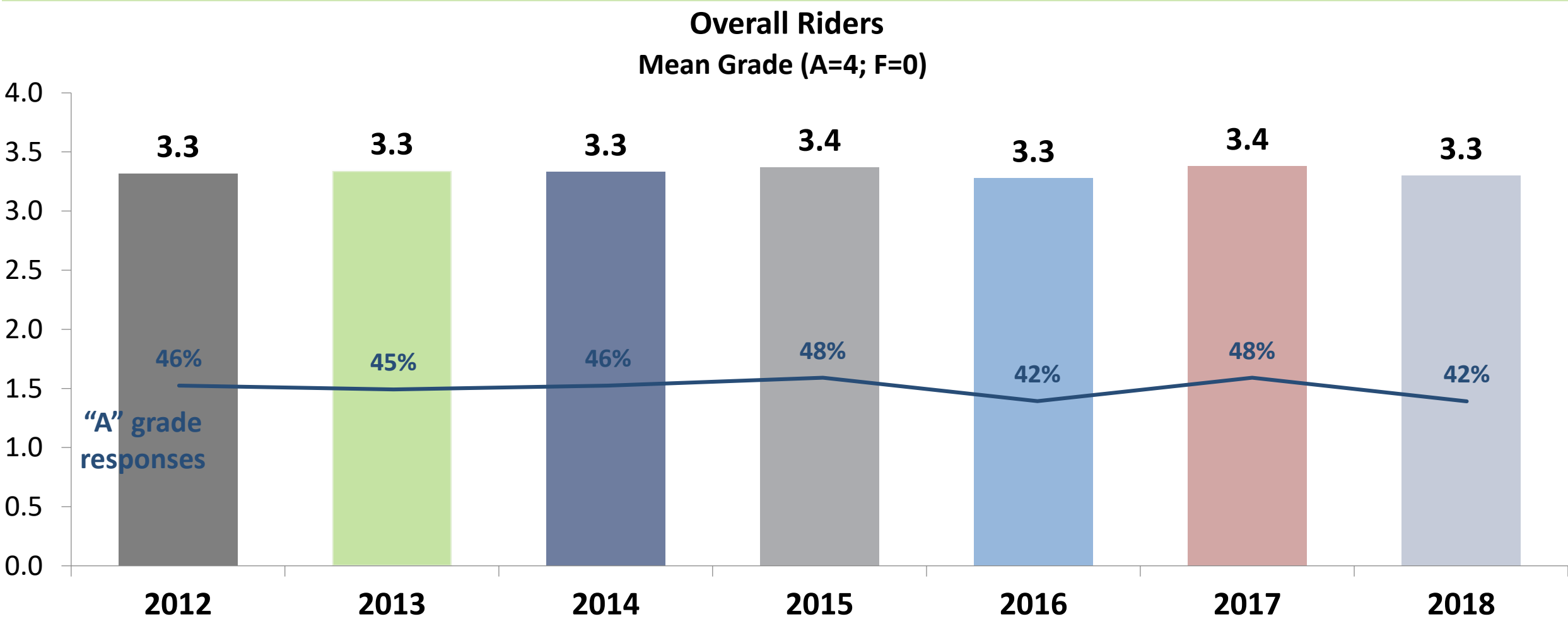
Overall Riders



8. If you were giving Sound Transit an overall report card, where A means excellent, C means average, and F means failing, what overall grade would you give them?

Sound Transit Grade – Overall Year-to-Year

Although ST’s overall average grades have remained steady over the last several years (3.3-3.4 mean), satisfaction intensity (A grades) have fluctuated each year since 2015.

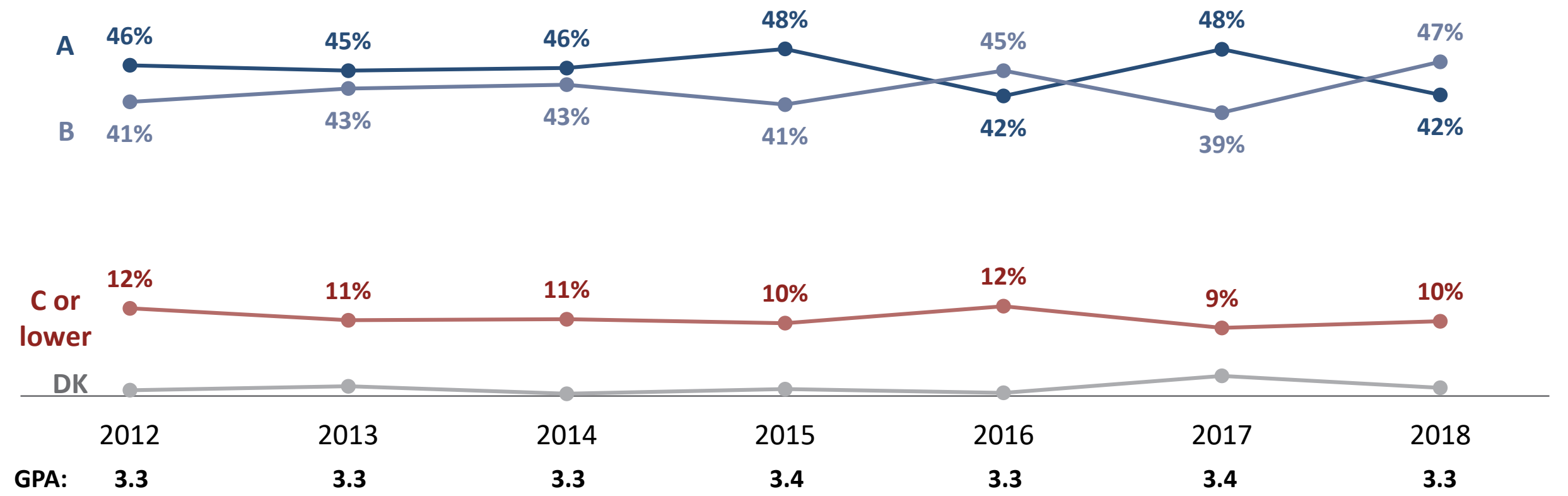


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Sound Transit Grade – Overall Year-to-Year

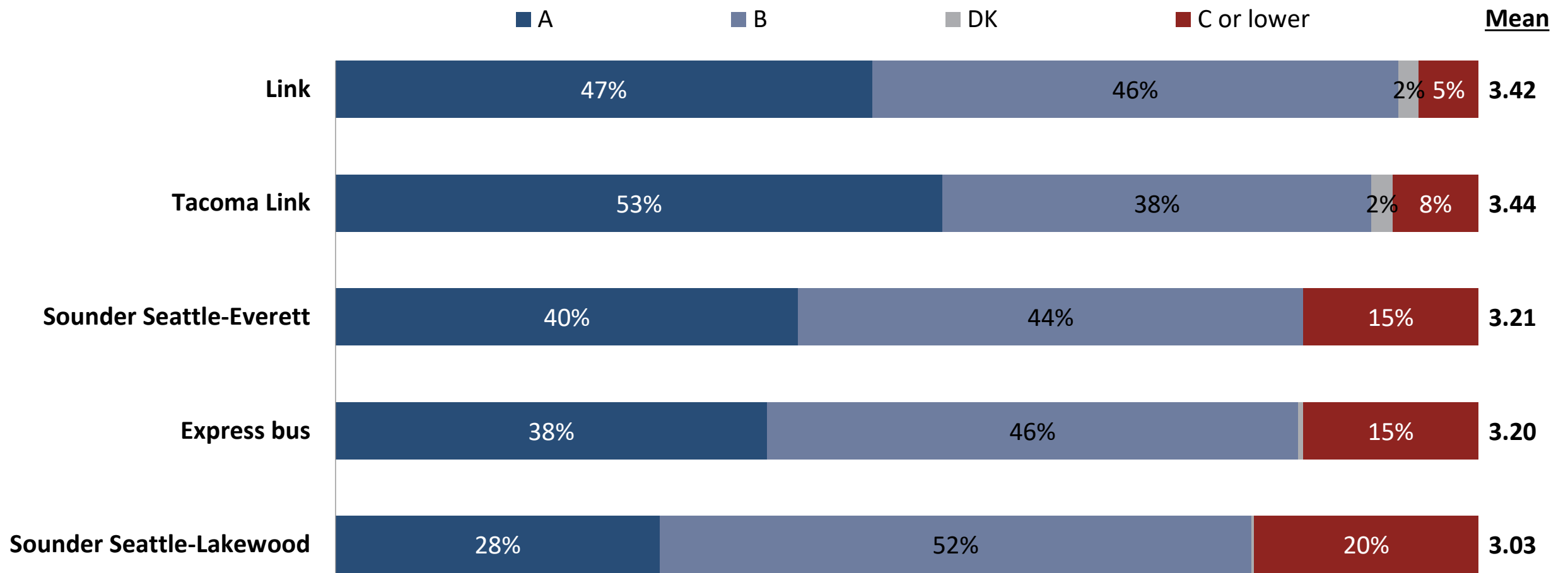
Over the last few years, the plurality of ST’s overall agency grades have wavered back-and-forth between positive A and B ratings. Neutral and negative sentiments toward the agency (C or lower grades) have remained consistently low.

Overall Riders – Annual Trend



Sound Transit Grade by Service

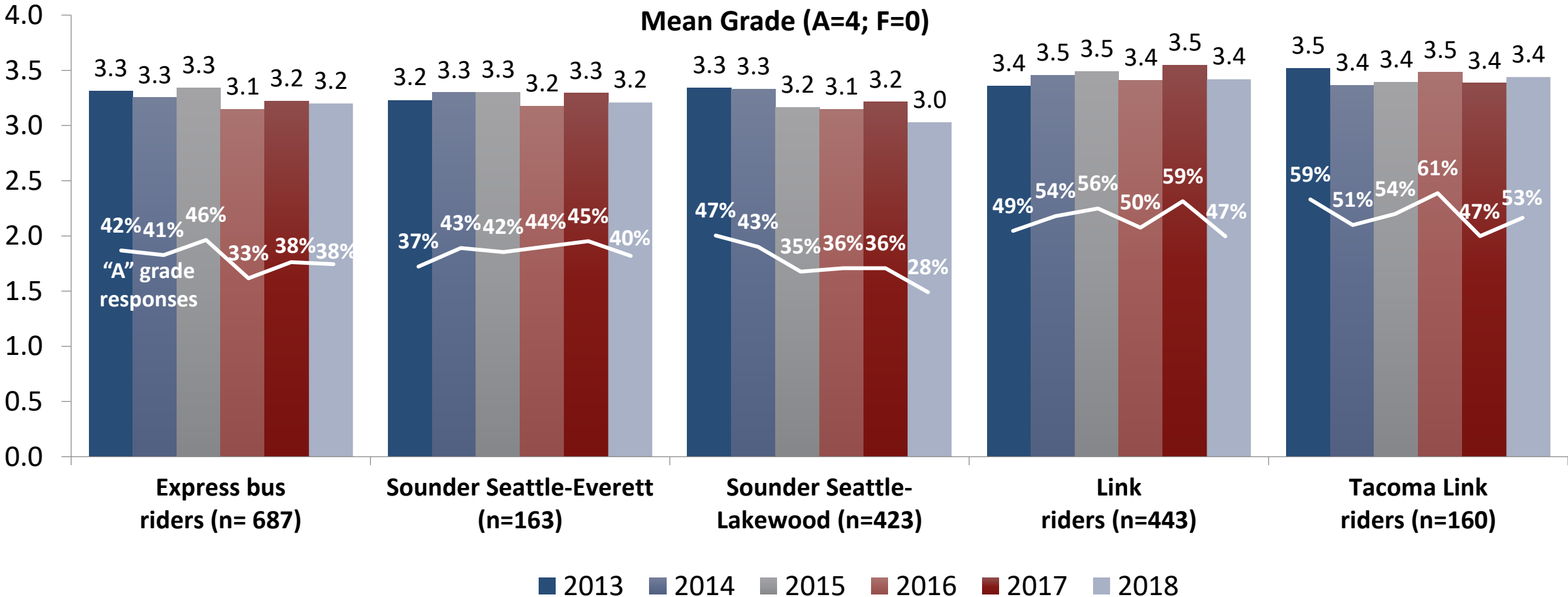
Among those riding each of its services, Link and Tacoma Link riders give Sound Transit the highest grades. Southline Sounder riders now give ST the lowest grades, with one-in-five giving the agency a C or lower rating.



8. If you were giving Sound Transit an overall report card, where A means excellent, C means average, and F means failing, what overall grade would you give them?

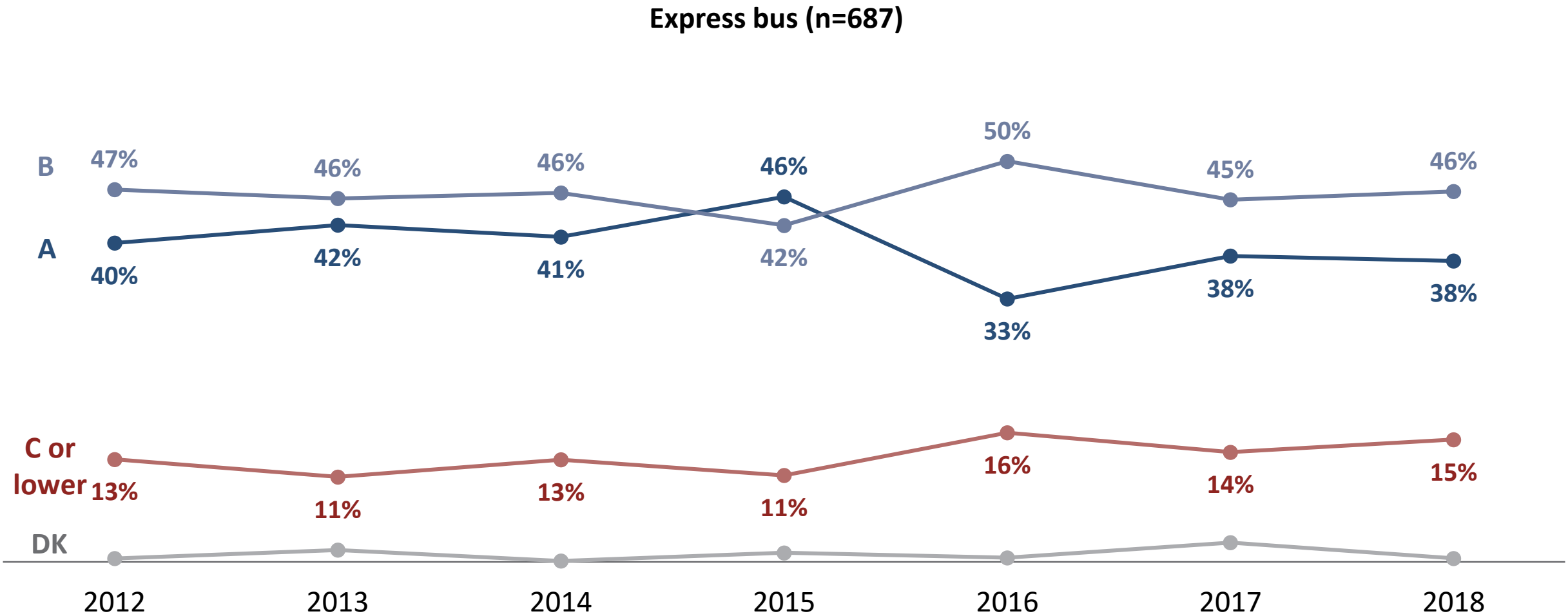
Sound Transit Grade by Service, Year-to-Year

Over the last few years, average ST grades have remained consistent across riders on most services – including Link, Express bus, Northline Sounder, and Tacoma Link – albeit with fluctuations in positive intensity (A grades). The key exception is among Southline Sounder riders, who have given ST declining marks since 2013.



Sound Transit Grade by Express Bus Riders, Y2Y

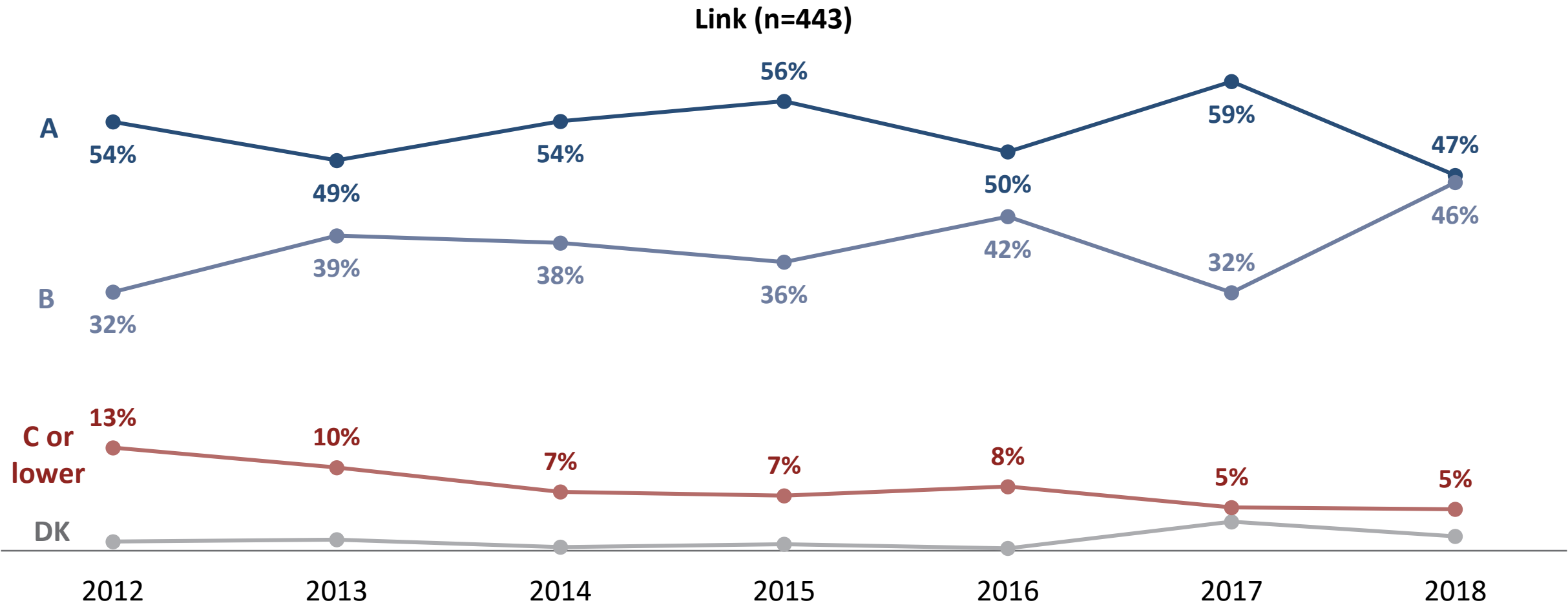
Apart from a peak in 2015, Express bus riders have given ST largely consistent ratings over the last several years. Neutral and negative C or lower grades have remained slightly elevated since 2016.



8. If you were giving Sound Transit an overall report card, where A means excellent, C means average, and F means failing, what overall grade would you give them?

Sound Transit Grade by Link Riders, Year-to-Year

Following recent ratings peaks in 2015 and 2017, positive intensity (A grades) have returned to their previous levels among Link riders. Despite the fluctuation in intensity, Link riders' general positive ratings are the among the highest since 2012, with fewer than one-in-ten giving the agency a C or lower grade.

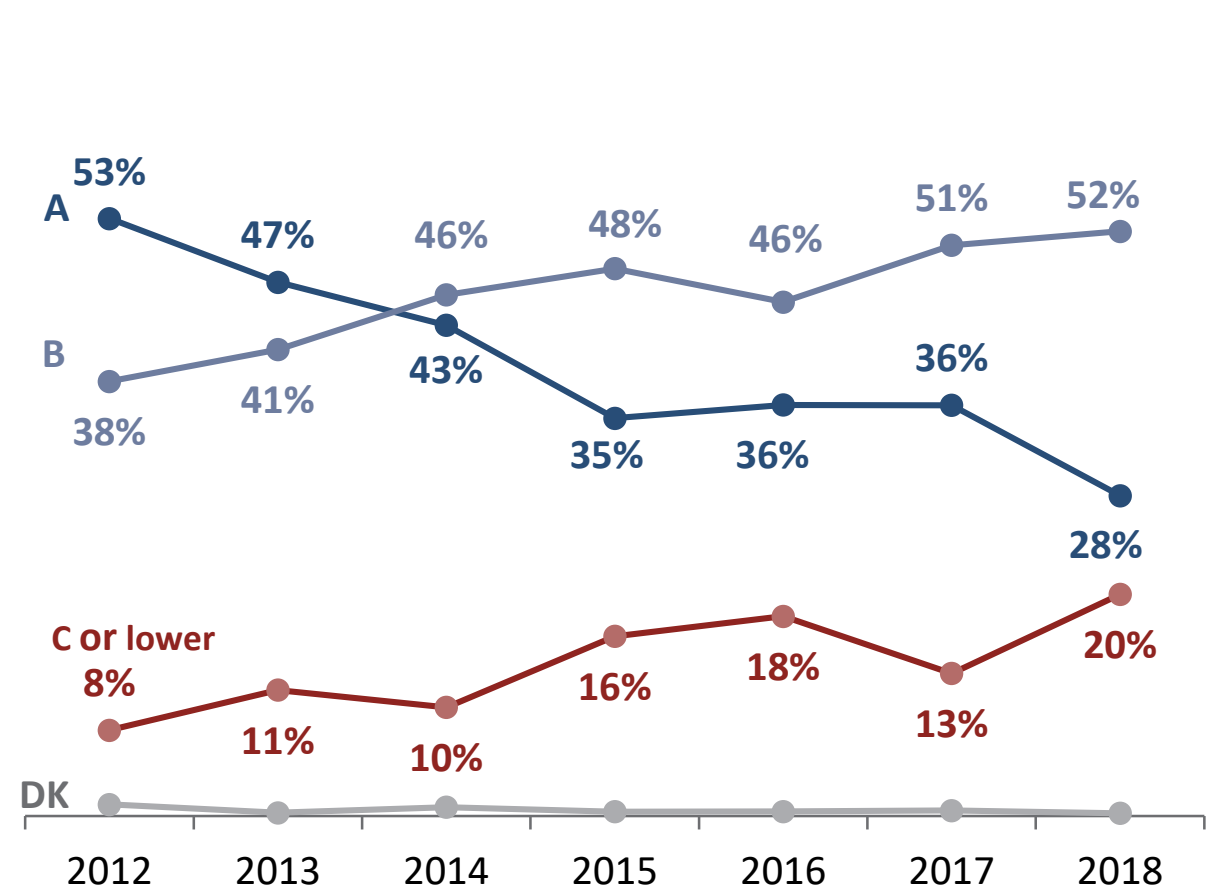


8. If you were giving Sound Transit an overall report card, where A means excellent, C means average, and F means failing, what overall grade would you give them?

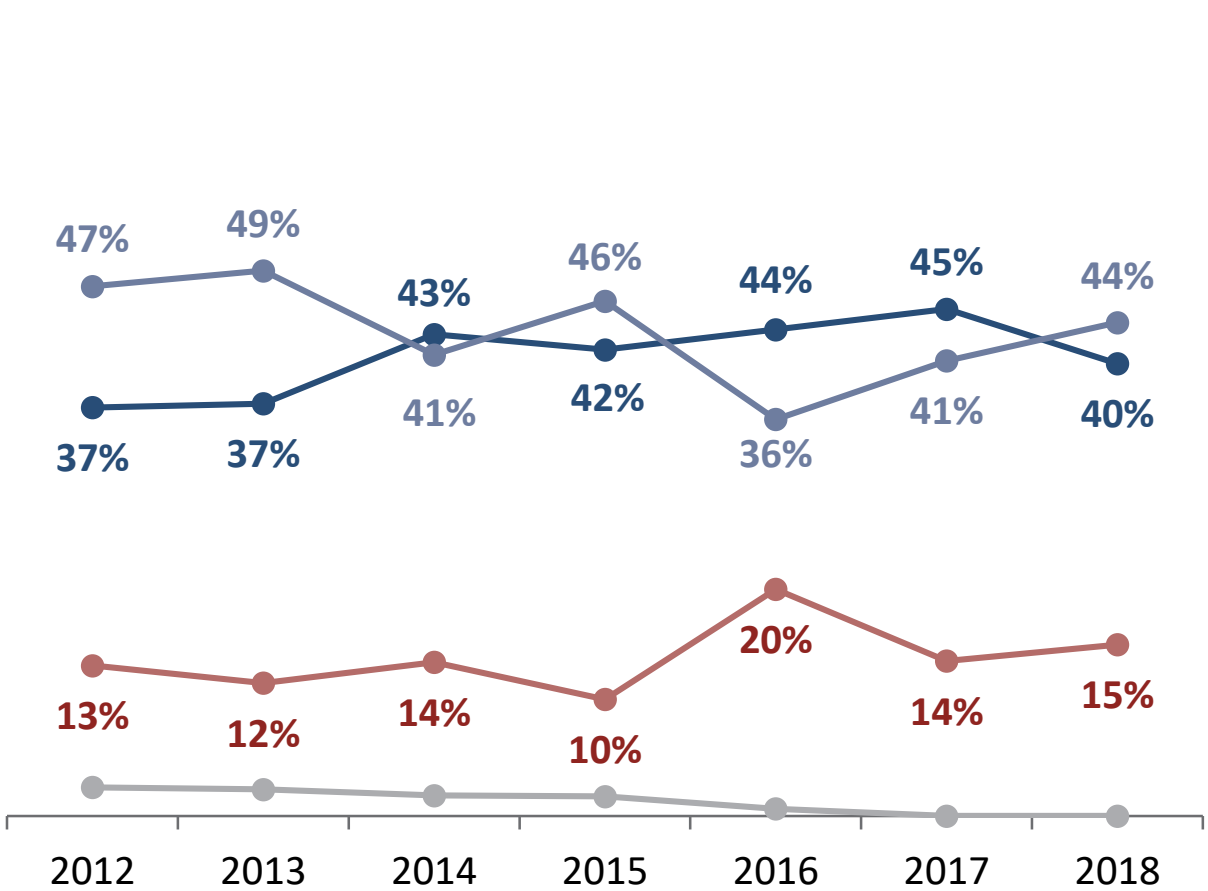
Sound Transit Grade by Sounder Riders, Year-to-Year

ST grades have declined the most among Southline Sounder riders since 2012, including a significant drop in positive intensity (53 → 28% A) and an influx of lower grades (8 → 20% C/lower). Agency ratings have remained relatively more consistent among Northline Sounder riders during that timeframe.

Sounder Seattle-Lakewood (n=423)



Sounder Seattle-Everett (n=163)

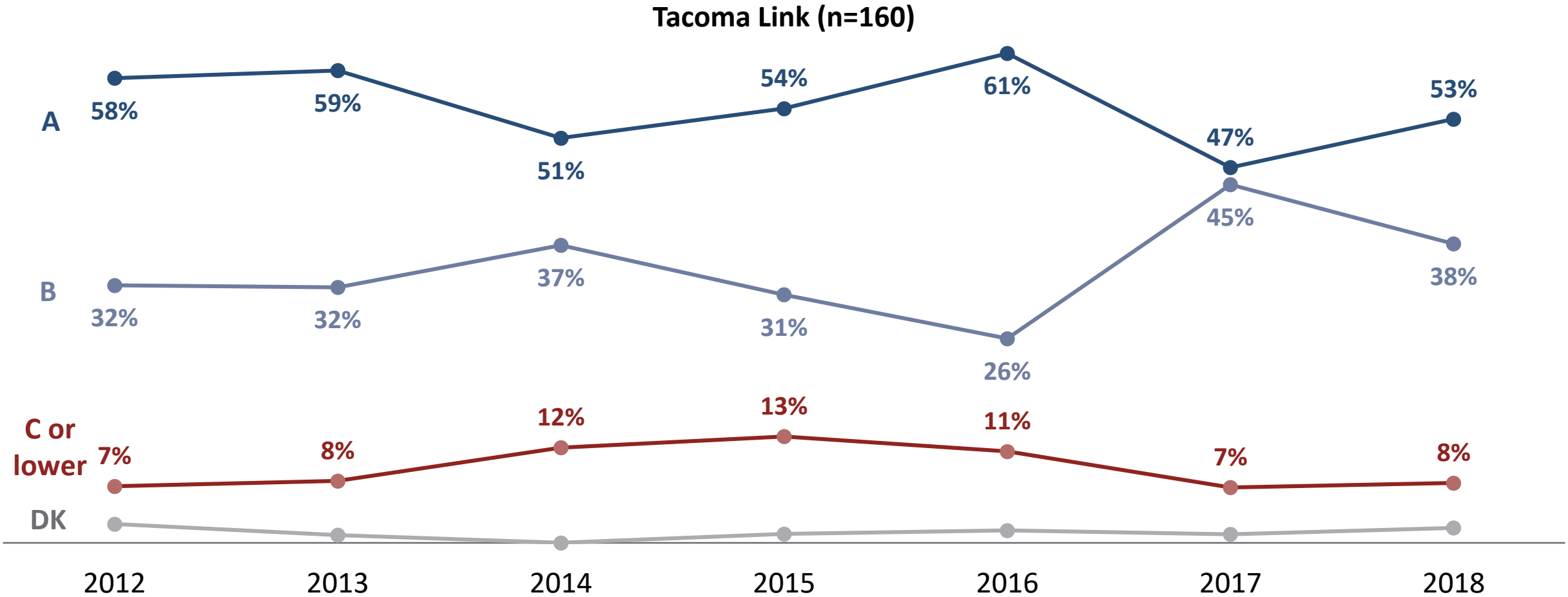


8. If you were giving Sound Transit an overall report card, where A means excellent, C means average, and F means failing, what overall grade would you give them?

Sound Transit Grade by Tacoma Link Riders, Year-to-Year



Following a fluctuation in ST's ratings between 2016 and 2017, Tacoma Link riders' grades for the agency have returned to pre-2016 levels. Note that the subgroup sizes have been relatively lower for Tacoma Link in previous years, potentially contributing to greater variance with a larger margin of error compared to other services.

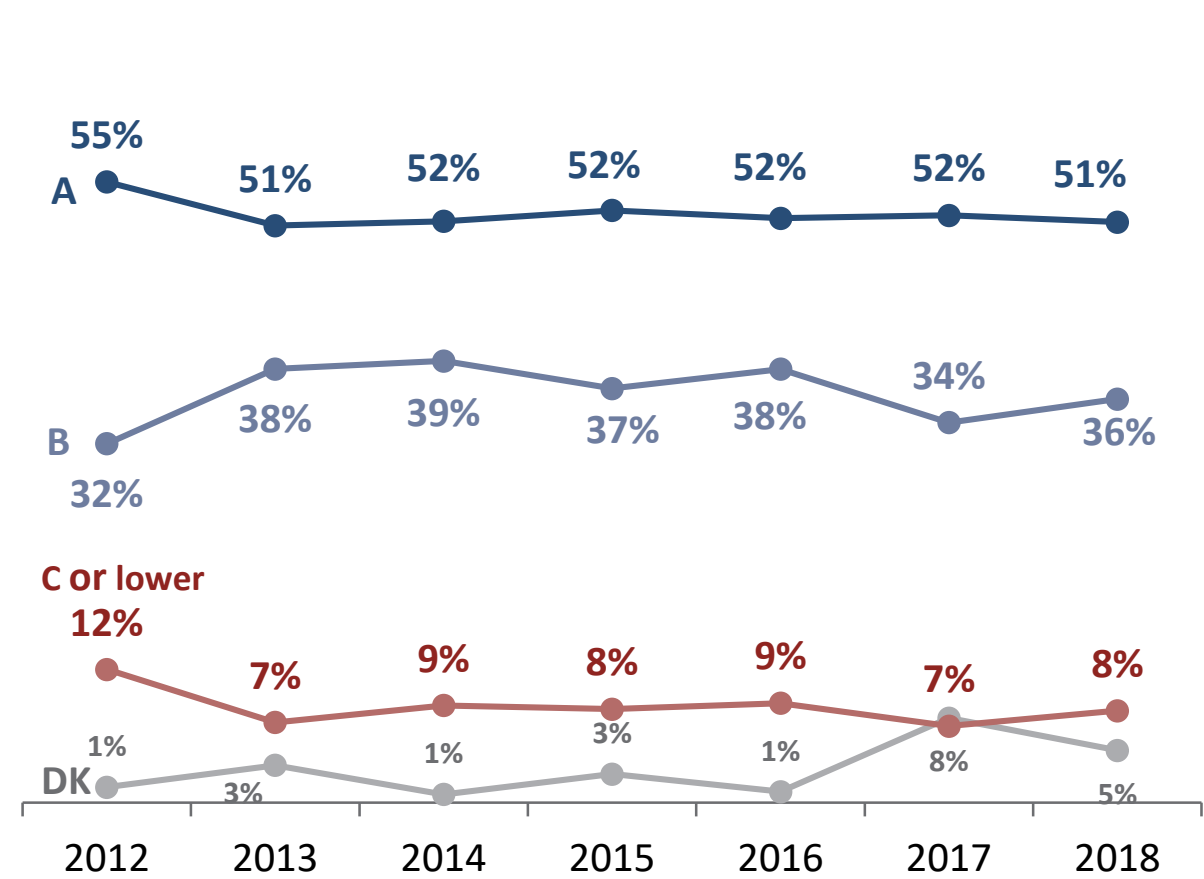


8. If you were giving Sound Transit an overall report card, where A means excellent, C means average, and F means failing, what overall grade would you give them?

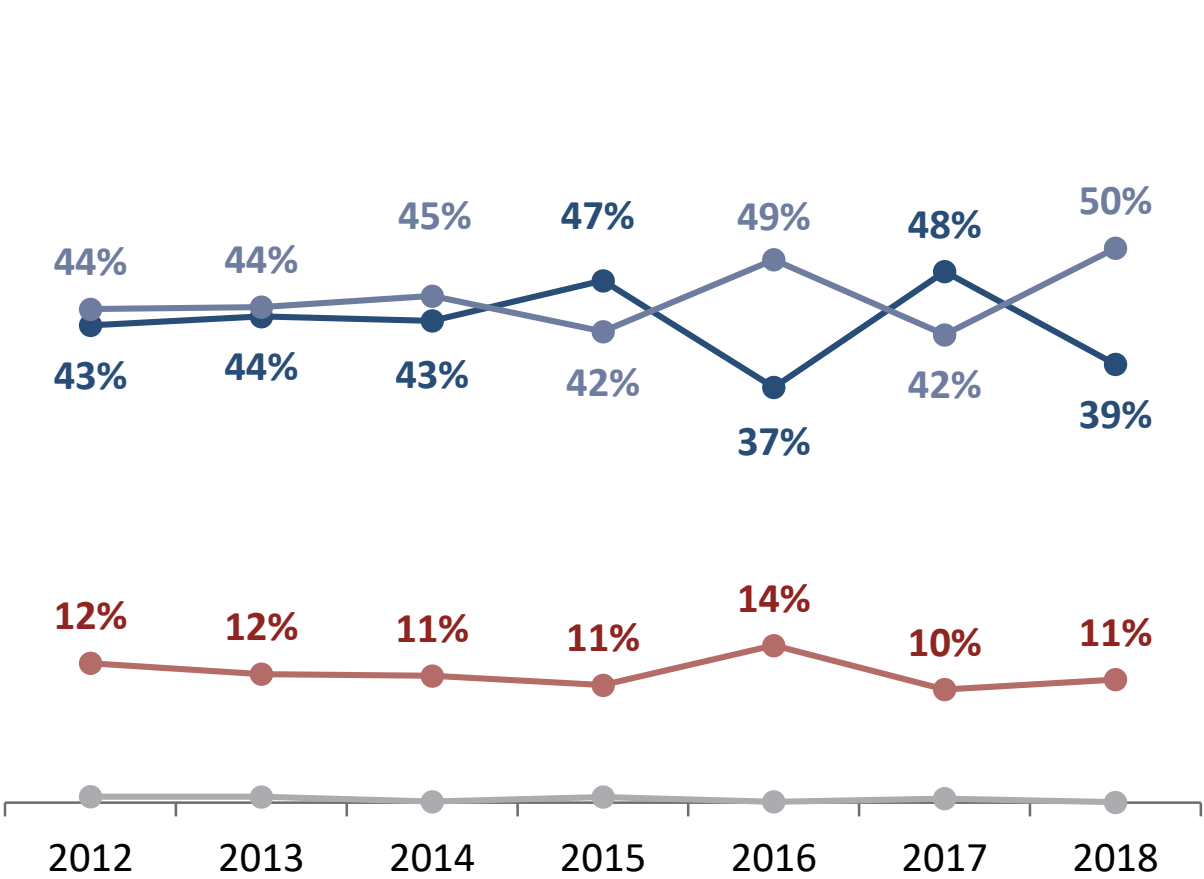
ST Grade by Length of Ridership, Year-to-Year

Most of ST's recent ratings fluctuation has been among established riders who have been riding for over a year. Newer riders continue to give ST consistently higher ratings, with a majority giving it an A grade every year. C or lower grades remain relatively low for both rider groups.

New riders (<1 year) (n=458)



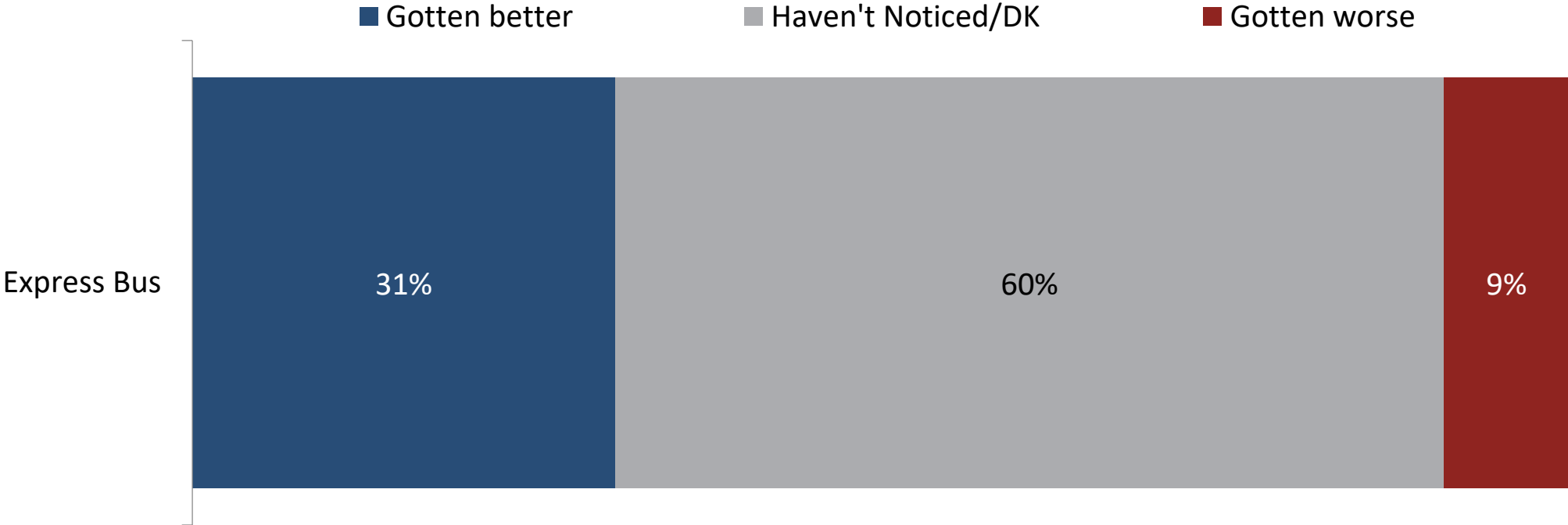
Established riders (1 year+) (n=1,413)



8. If you were giving Sound Transit an overall report card, where A means excellent, C means average, and F means failing, what overall grade would you give them?

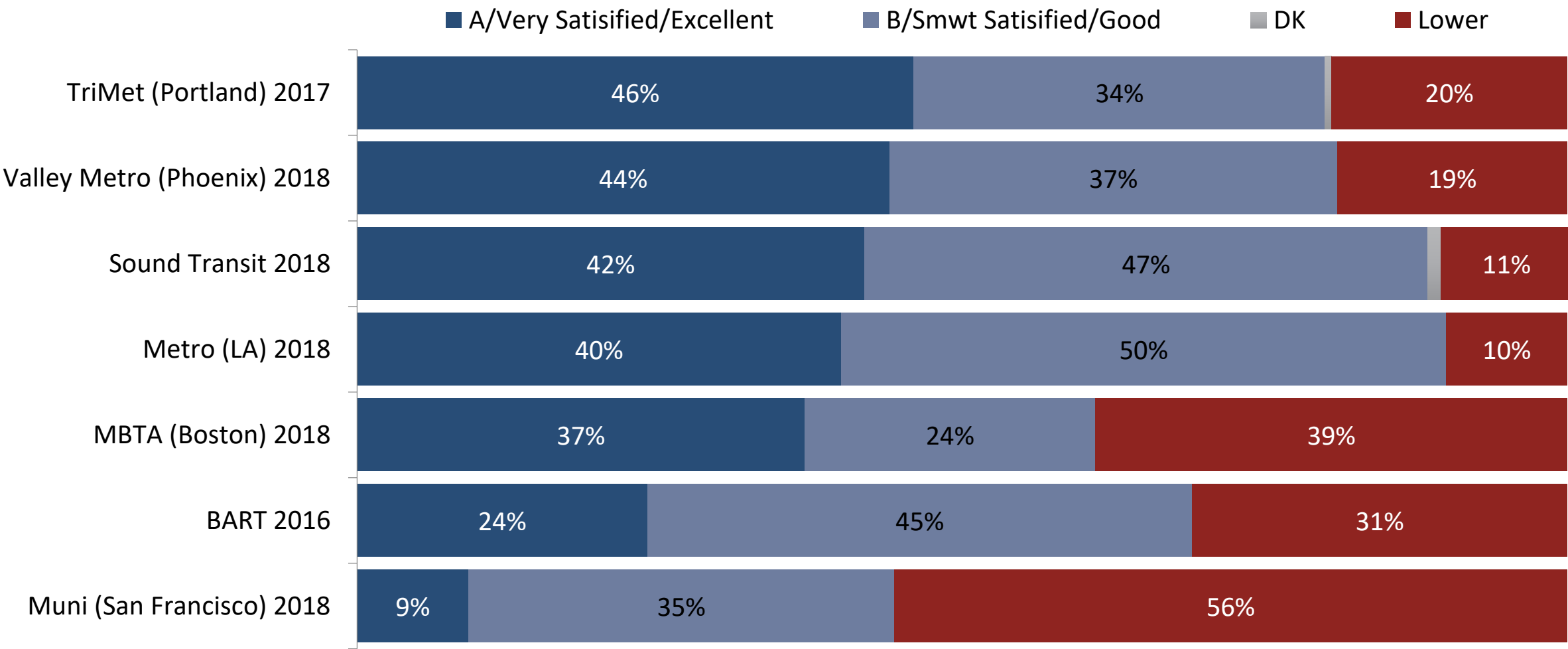
Overall Change in Bus Quality

A majority of Express bus riders haven't noticed a change in service quality over the last year. Otherwise, more say it has gotten better than worse by a three-to-one margin.



Benchmarking Against Other Agencies

Sound Transit continues to receive some of the higher ratings compared to other transit agencies. Although some agencies have slightly higher ratings intensity, ST has among the highest general positive ratings and lowest neutral/negative ratings.



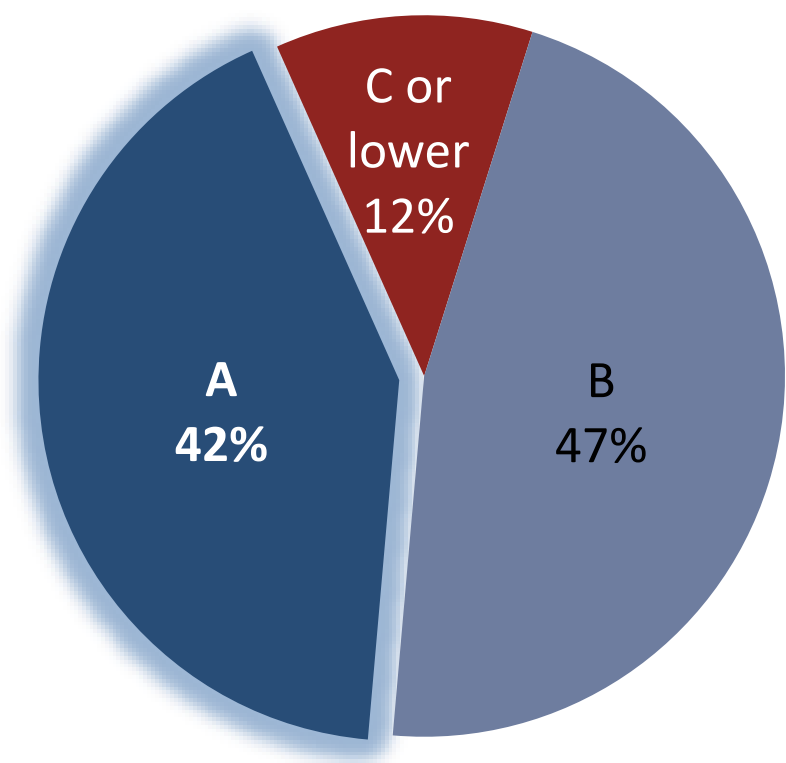


Top-of-Mind Improvements

Grade in Focus: A Grade

Those giving ST an A grade cite its high service reliability as the top reason for that grade.

8. Sound Transit Grade

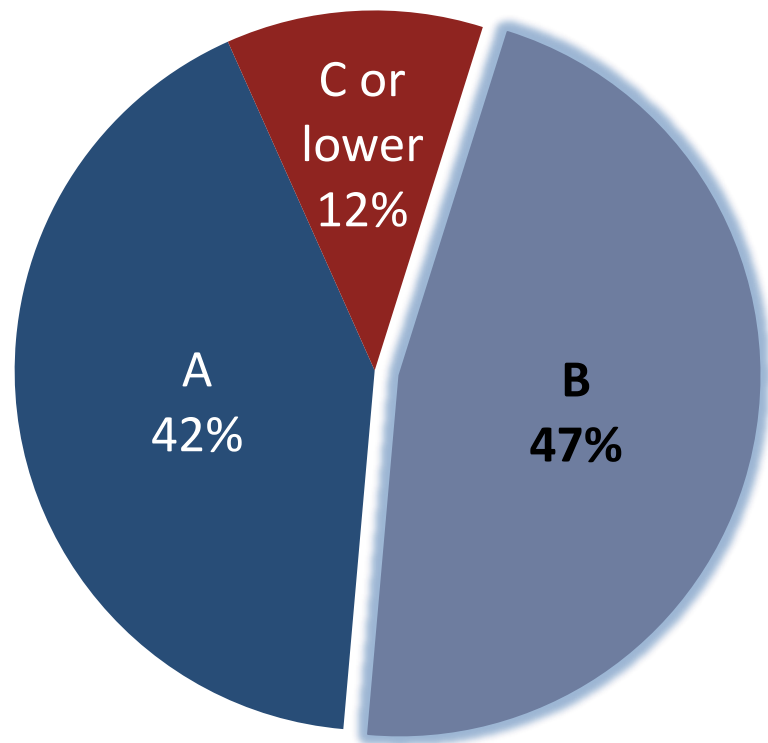


	9. Top Reasons for A Grade (n=740)	%
	Reliable Service/ Comes Regularly	62
	Easy to use	15
	Gets to destination fast	9
	Nice/Comfortable	4
	Affordable	3
	Other	1
	No complaints/ No suggestions	3

Grade in Focus: Positive Mentions for B Grade

Those giving the agency a B grade also site service reliability as a top positive reason, followed by ease of use.

8. Sound Transit Grade

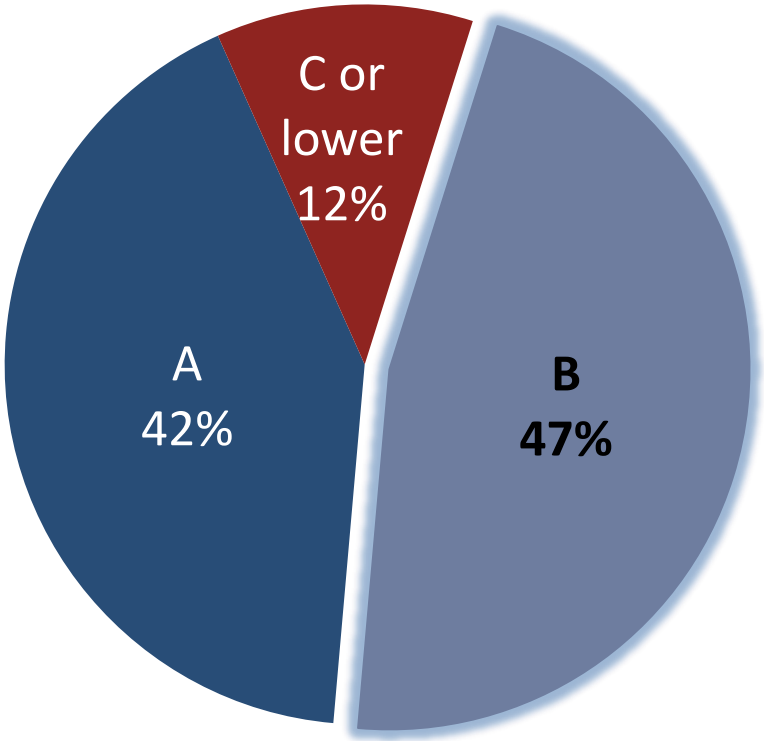


	9. Top Positive Reasons for B Grade (n=876)	%
	Reliable Service/Comes Regularly	36
	Easy to use	17
	Gets to destination fast	7
	Affordable	4
	Nice/Comfortable	3
	No complaints/No suggestions	2

Grade in Focus: Critical Mentions for B Grade

There is little consensus behind why riders give ST a B grade.

8. Sound Transit Grade

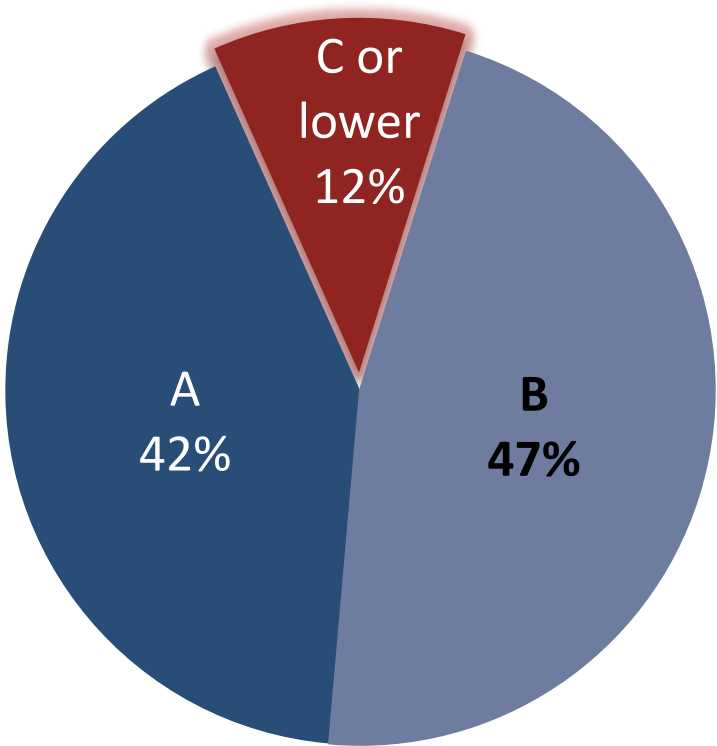


	9. Top Critical Reasons for B Grade (n=876)	%
	Too crowded	7
	Not enough service	6
	Late	4
	Does not come regularly enough	3
	Not enough parking	3
	Too expensive	2
	Bad communication/No explanation of problems/delays	1
	Too slow/Too many stops	1
	Safety concerns	1
	Rude drivers/personnel	1
	Managing taxpayer dollars	<1
	Managing service expansion projects	<1

Grade in Focus: C or Lower Grade

Those giving ST a C or lower grade cite late on-time-performance, crowdedness, and not enough service as the top critical reasons for those grades.

8. Sound Transit Grade



9. What is your primary reason for that grade? (One response recorded)

	9. Top Reasons for C or Lower Grade (n=260)	%
	Late	13
	Not enough service	11
	Too crowded	11
	Does not come regularly enough	6
	Not enough parking	5
	Too expensive	4
	Too slow/Too many stops	3
	Bad communication/No explanation of problems/delays	2
	Safety concerns	2
	Managing taxpayer dollars	2
	Rude drivers/personnel	1
	Managing service expansion projects	<1
	Other	7
	No complaints/No suggestions	6
	(DK)	2

Improving Grade – by Service

Both Southline and Northline Sounder riders suggest a variety of service improvements pertaining to service performance (better on-time performance) and structurally (more frequency, expanded service hours, more routes/destinations, and – for Southline riders – more parking.

Expanding the number of routes and destinations and running earlier or later are the top suggestions among Link, Tacoma Link riders, while Express bus riders want more frequent service along with a variety of other things. Tacoma Link riders largely want expanded service to more places.

	Overall	Express bus (n=687)	Sounder Seattle-Everett (n=163)	Sounder Seattle- Lakewood (n=423)	Link (n=443)	Tacoma Link (n=160)
Have more routes/go more places	15	13	18	10	17	39
Less time between service/Run more frequently	12	19	15	14	6	10
Run earlier or later	10	5	18	14	13	8
Get longer buses/train, fix overcrowding	9	11	3	6	9	3
Be on time	6	10	12	19	<1	1
More parking	5	5	5	11	4	9
Lower fares	5	4	3	2	6	2
Better communication when there are problems	2	3	5	7	1	1
Improve scheduling	2	4	2	3	<1	3
Get cleaner or new bus/trains	1	2	1	1	1	1
No complaints/No suggestions	19	14	12	7	26	17
Other (specify)	12	10	5	4	16	5
Don't know	1	<1	2	-	2	2
Refused	<1	<1	-	-	-	-

10. What is one thing Sound Transit could do to improve their services?
(One response recorded)



Performance Attribute Ratings and Grades

Aggregated Service Attribute “A” Grades

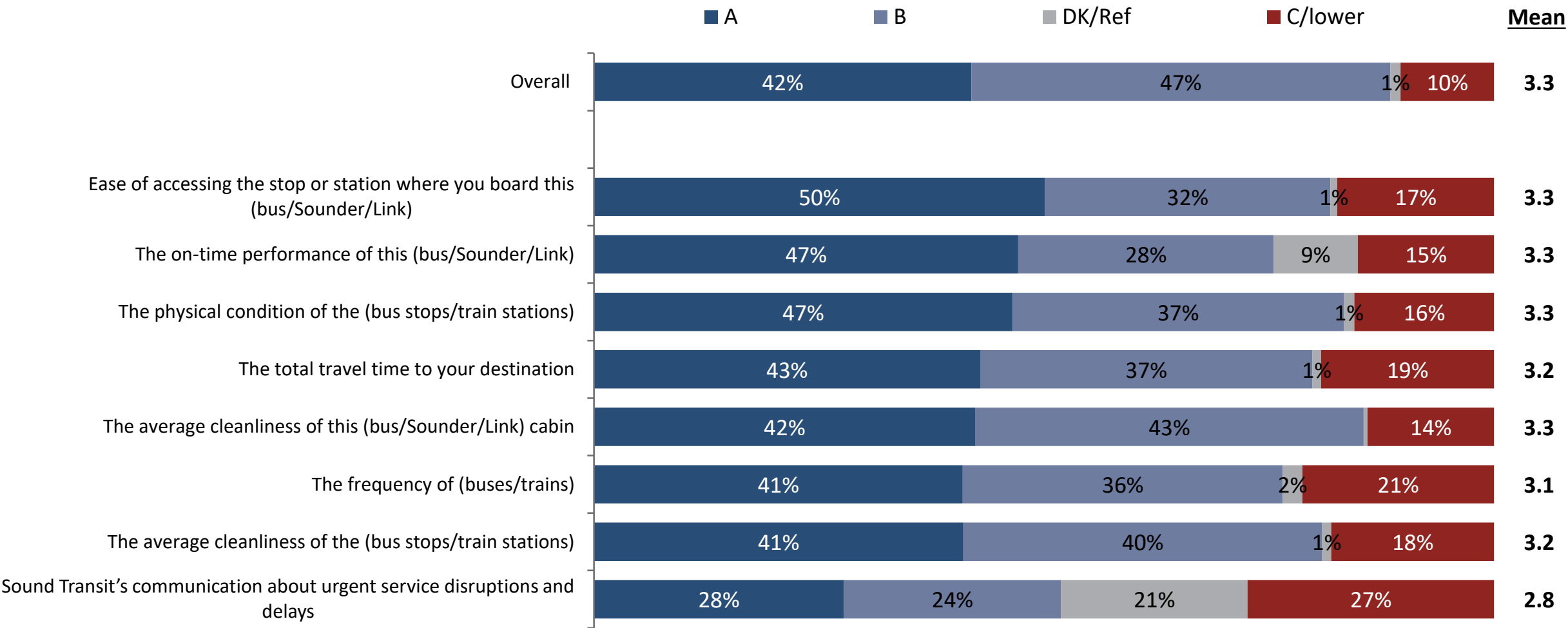
There is a wide variance in attribute A grades across each of Sound Transit’s services. Positive intensity is relatively low for service disruption/delay communication (26-39% A) among riders of all services. Sounder riders also give the lowest ratings for on-time performance, though their other most critical attribute – frequency of trains – is largely structural. Several customer service benchmarks (physical condition of stops, cabin cleanliness, and on-time performance) remain key points of improvement for Express bus riders and cleanliness remains a relative pain point for Tacoma Link.

Percentage of attribute “A” grades for each ST service	Overall	Express bus (n=687)	Sounder (n=586)	Link (n=443)	Tacoma Link (n=160)
Overall ST grade	42%	38%	30%	47%	53%
The job the station agents are doing	74%	-	74%	-	-
The job the train conductor is doing	62%	-	76%	59%	82%
The courtesy of the bus driver	69%	69%	-	-	-
The appearance of the bus driver	71%	71%	-	-	-
Ease of accessing the stop or station where you board this (bus/Sounder/Link)	50%	60%	61%	40%	76%
The physical condition of the (bus stops/train stations)	47%	36%	52%	53%	43%
The average cleanliness of this (bus/Sounder/Link) cabin	41%	31%	52%	47%	30%
The on-time performance of this (bus/Sounder/Link)	47%	38%	33%	56%	68%
The smoothness of the ride on Link	49%	-	-	49%	53%
The total travel time to your destination	43%	38%	48%	45%	68%
The frequency of (buses/trains)	41%	28%	23%	54%	50%
The average cleanliness of the (bus stops/train stations)	42%	41%	60%	40%	46%
Sound Transit's communication about urgent service disruptions and delays	28%	26%	30%	28%	39%

Q14-26. Using a scale of A through F, where A means excellent, C means average, and F means failing, how would you grade:

Aggregated Service Attribute Grades – Overall Riders

Urgent communications about service disruptions and delays is the most critically-rated attribute among overall Sound Transit riders, with nearly half giving it a C or lower grade. Nearly a quarter give lower ratings for on-time performance and bus/train frequency.

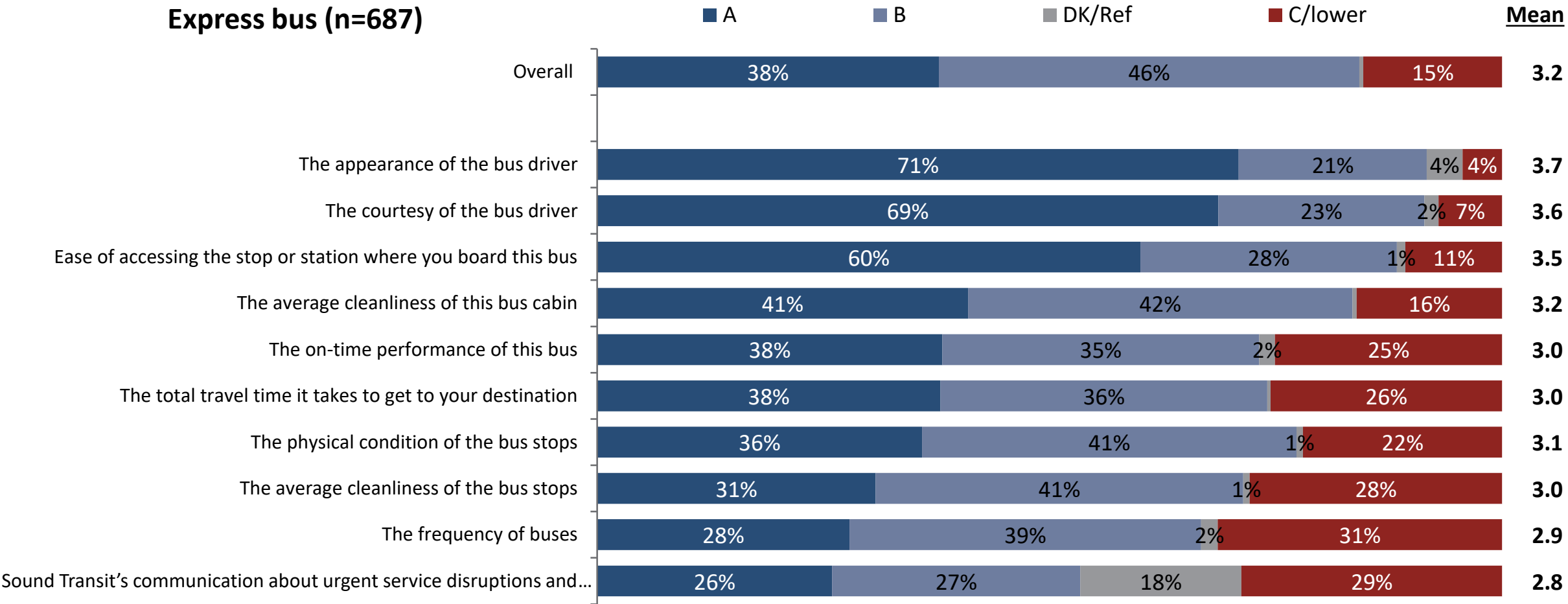


Q14-26. Using a scale of A through F, where A means excellent, C means average, and F means failing, how would you grade:

Aggregated Service Attribute Grades – Express Bus Riders

Service disruption/delay communication, bus frequency, stop cleanliness, on-time performance, and travel time satisfaction are some of the biggest pain points for ST Express bus riders. At least a quarter of Express bus riders give each of these attributes a C/lower grade, though nearly one-in-five cannot rate service disruption communication for Express bus.

Express bus (n=687)

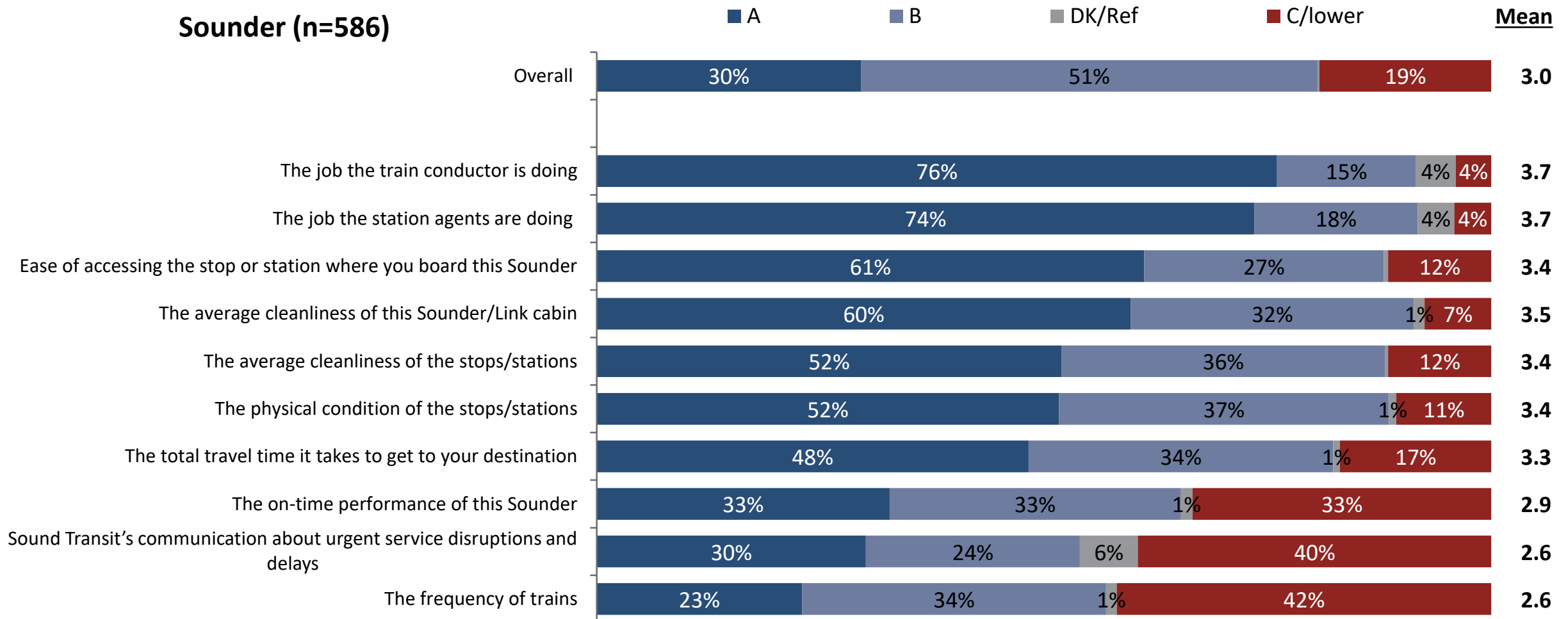


Q14-26. Using a scale of A through F, where A means excellent, C means average, and F means failing, how would you grade:

Aggregated Service Attribute Grades – Sounder Riders

Sounder riders are heavily critical of service disruptions, frequency of trains, and on-time performance. Over a third give these attributes a C or lower rating.

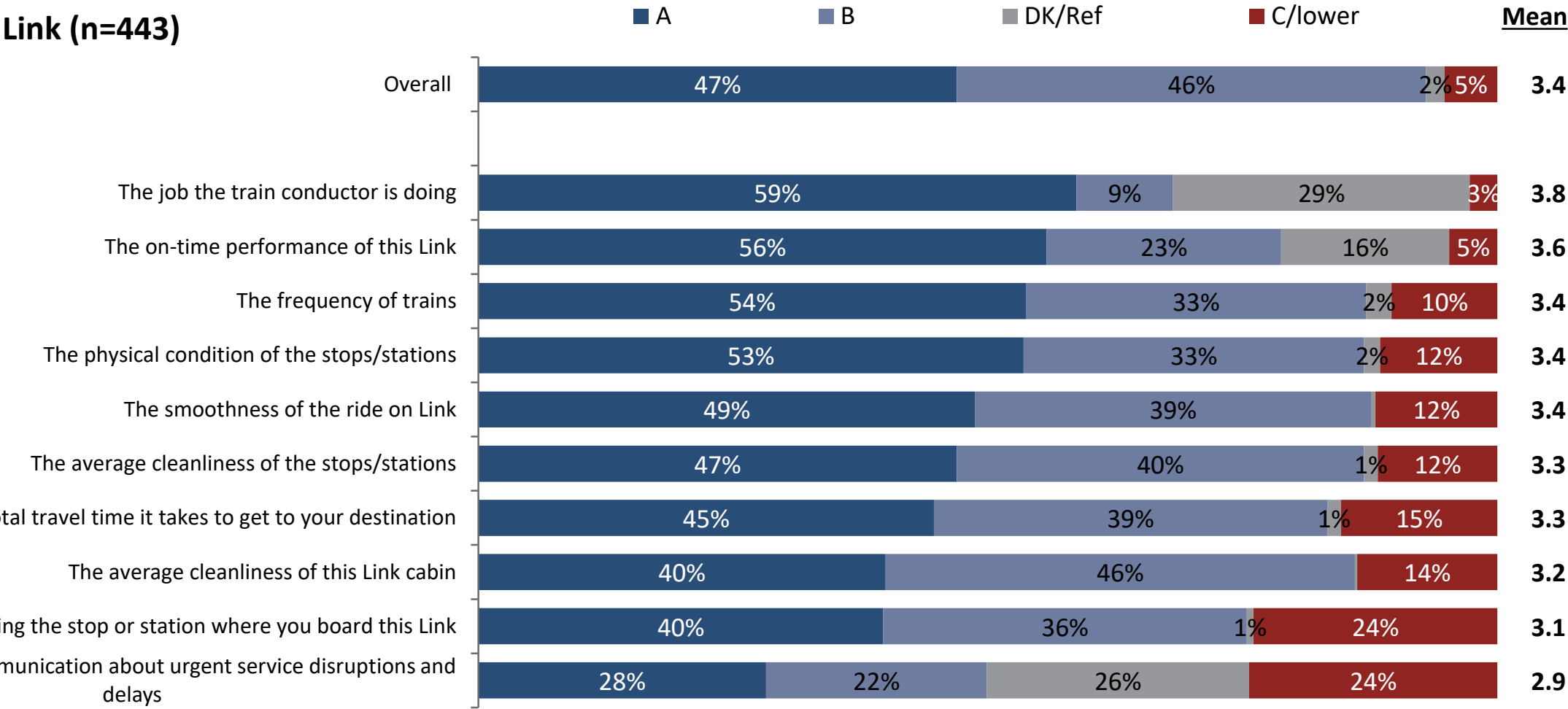
Sounder (n=586)



Q14-26. Using a scale of A through F, where A means excellent, C means average, and F means failing, how would you grade:

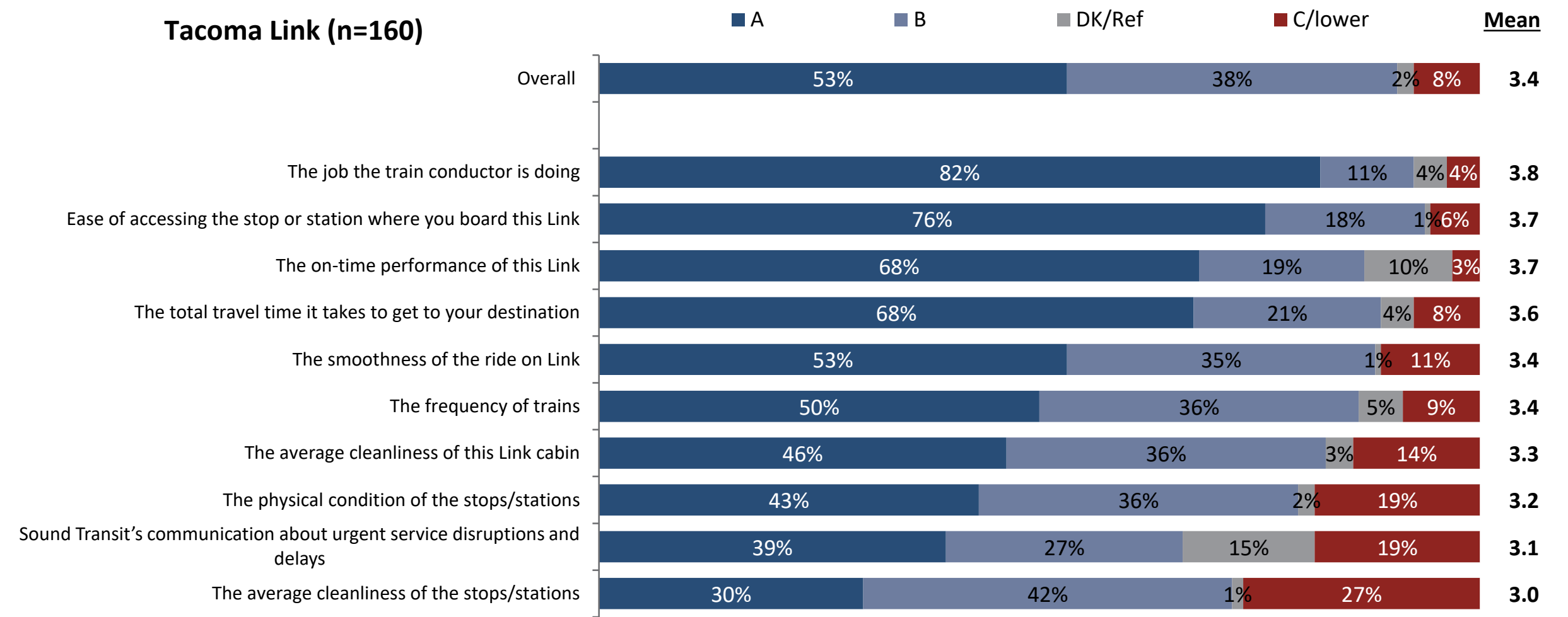
Aggregated Service Attribute Grades – Link Riders

A plurality of Link riders give most attributes an A grade. They are most critical of the ease of stop access and many cannot rate on-time performance, service disruption/delay communications, or the job the train conductor is doing.



Aggregated Service Attribute Grades – Tacoma Link Riders

A strong majority of Tacoma Link riders rate several of its key service performance attributes very highly. They remain the most critical of stop/station cleanliness.



Q14-26. Using a scale of A through F, where A means excellent, C means average, and F means failing, how would you grade:



Key Driver Analysis

Full Attribute List – Number of Responses

Q	Service Attributes	Overall n	Express bus n	Sounder n	Link n
Q14	The average cleanliness of this (bus/Sounder/Link) cabin	1876	687	586	443
Q15	The average cleanliness of the (bus stops/train stations)	1876	687	586	443
Q16	The physical condition of the (bus stops/train stations)	1876	687	586	443
Q17	The job the station agents are doing	586	-	586	-
Q18	The courtesy of the bus driver	687	687	-	-
Q19	The appearance of the bus driver	687	687	-	-
Q20	The job the train conductor is doing	1189	-	586	443
Q21	The smoothness of the ride on Link	603	-	-	443
Q22	The total travel time it takes to get to your destination	1876	687	586	443
Q23	The on-time performance of (this bus/Sounder/Link)	1876	687	586	443
Q24	The frequency of (buses/trains)	1876	687	586	443
Q25	Ease of accessing the stop or station where you board (this bus/Sounder/Link)	1876	687	586	443
Q26	Sound Transit's communication about urgent service disruptions and delays	1876	687	586	443

Key Driver Analysis

A Key Driver Analysis, also referred to as an importance/performance analysis, evaluates the relationships between riders' satisfaction with individual service elements and Sound Transit as a whole to identify the most important areas to focus on improving and maintaining.

By doing an analysis of riders' overall satisfaction with Sound Transit and their ratings for each of the individual service elements, we can estimate which items have the strongest impact on riders' overall level of satisfaction with the agency. For this analysis, we have converted each satisfaction into a 5-point scale (A=5, B=4, C=3, D=2, and F=1) and run the mean rating for each element tested in the survey.

Service element importance is determined using a regression analysis of the relationship between each element's satisfaction rating and Sound Transit's overall service rating. This analysis helps identify which individual elements have the strongest impact on overall satisfaction with the service. In the following quadrant charts, the relative importance levels are shown vertically, with the more important elements (having a stronger impact on overall satisfaction) appear higher on the chart and less important elements (having a weaker impact on overall satisfaction) appear lower on the chart.

The Key Drivers Analysis classifies the relative levels of importance and performance into four general categories:

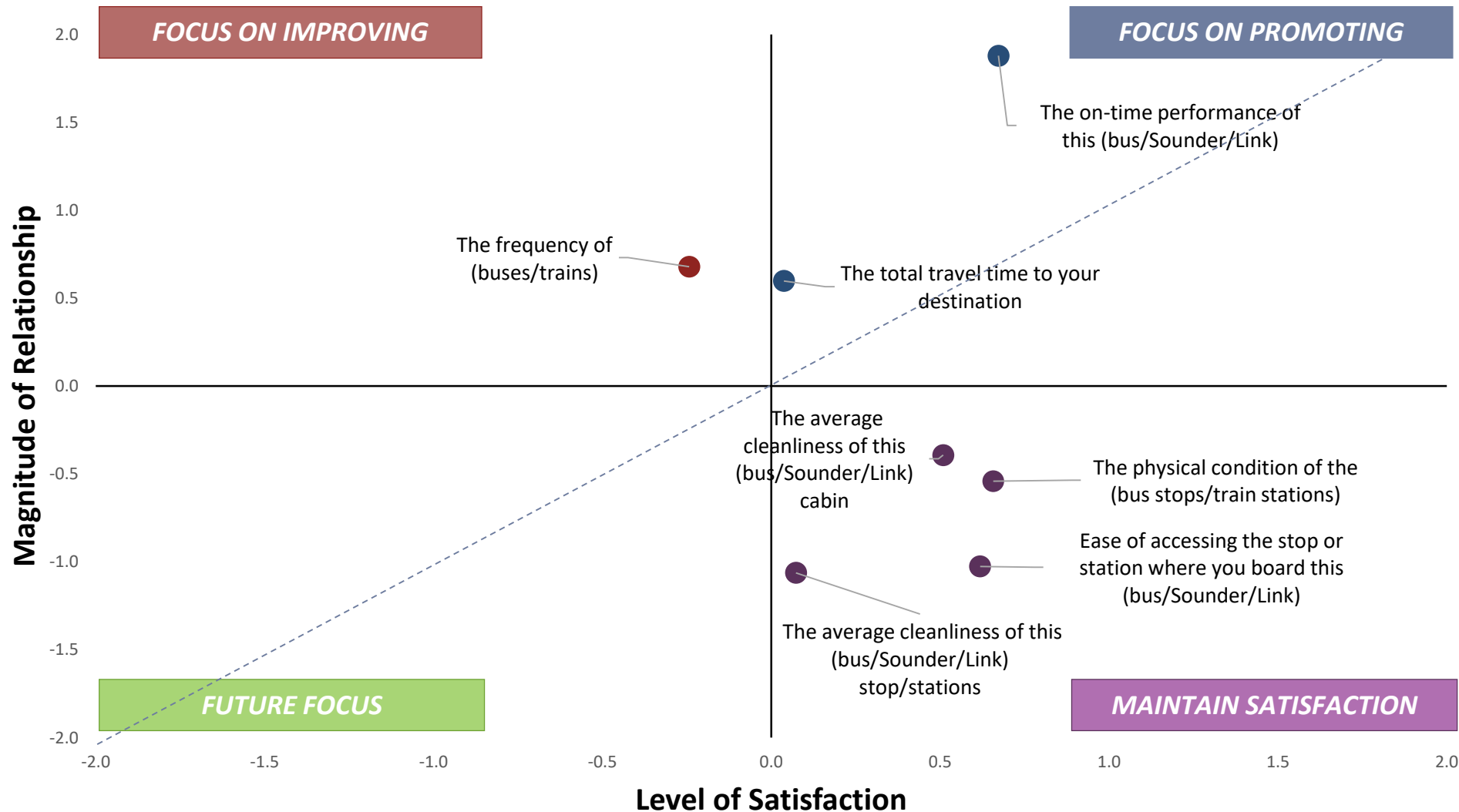
- ▶ **More important and lower rated – Improvement Targets**
- ▶ **More important and higher rated – Promote**
- ▶ **Less important but higher rated – Maintain**
- ▶ **Less important and lower rated – Future Focus**

Key Driver Analysis

- ▶ A Key Driver graph plots the results in a two-dimensional chart. Each element satisfaction rating is plotted on the graph by its importance to overall agency satisfaction (on the x-axis) and the performance in that area on the y-axis.
- ▶ This generates four quadrants. The most important is the top-left quadrant. The items plotted here have high importance to riders but their satisfaction in those areas is relatively low. These are the areas where improvements will have the biggest impact and generate the greatest increase in customer satisfaction for the effort.

More important and lower rated – Focus on Improving	More important and higher rated – Focus on Promoting
Less important and lower rated – Future Focus	Less important but higher rated – Maintain Satisfaction

Key Driver Analysis – Overall

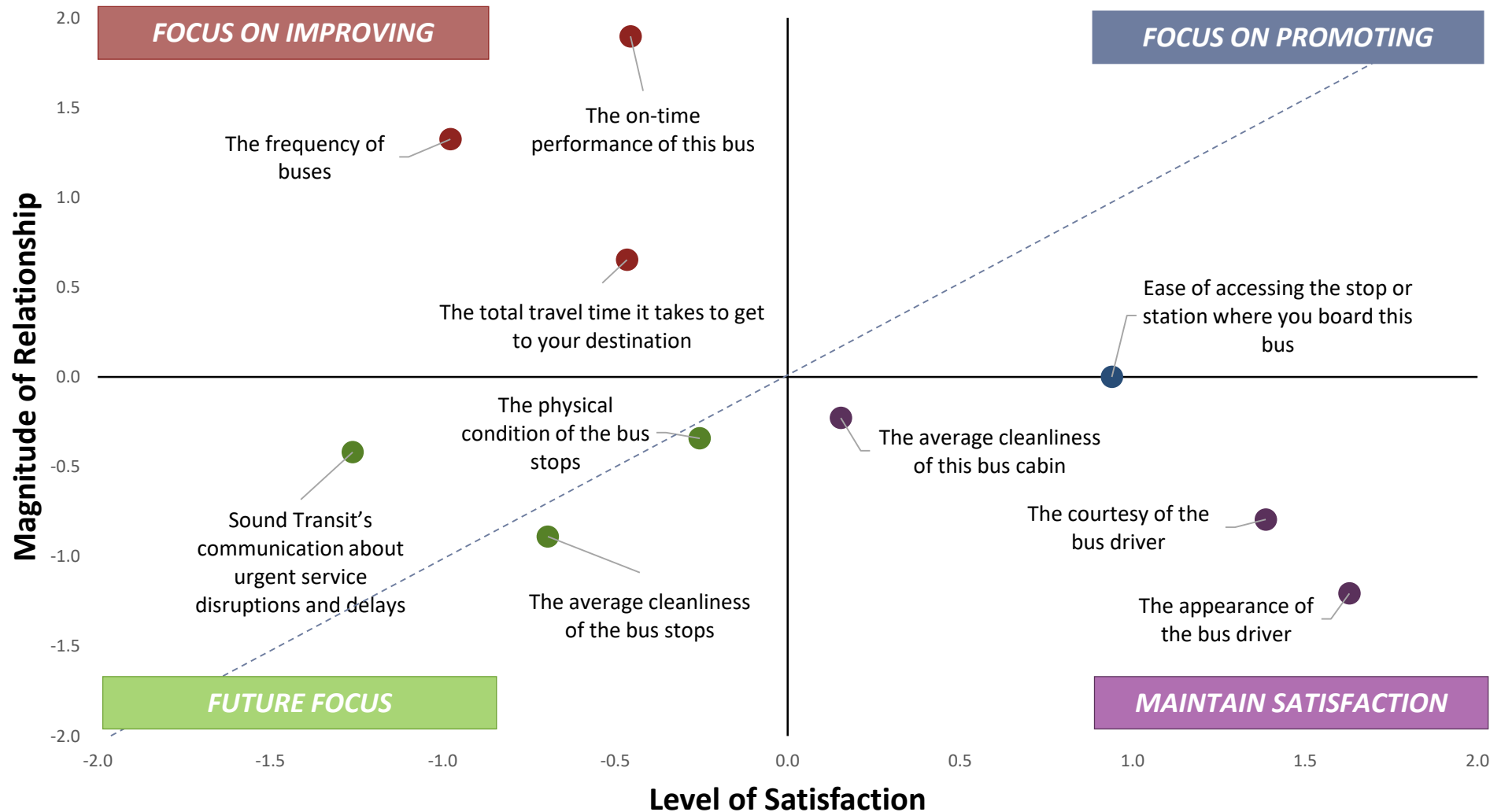


For the customer service attributes which apply to riders of all ST services: on-time performance, service frequency, and travel time have the greatest impact on overall satisfaction with the agency.

ST generally performs well on most attributes relative to their level of importance but service frequency remains the largest improvement opportunity, overall. Efforts to further improve and promote on-time performance and travel time should also have a significant impact on strengthening customer satisfaction with the agency, overall.

Cleanliness (on-board and at stops/stations), physical condition of stops, and ease of access are overperforming relative to their level of importance. Further improving these items will have relatively less impact on agency-wide satisfaction than the time and frequency performance aspects of ST's services.

Key Driver Analysis – Express Bus



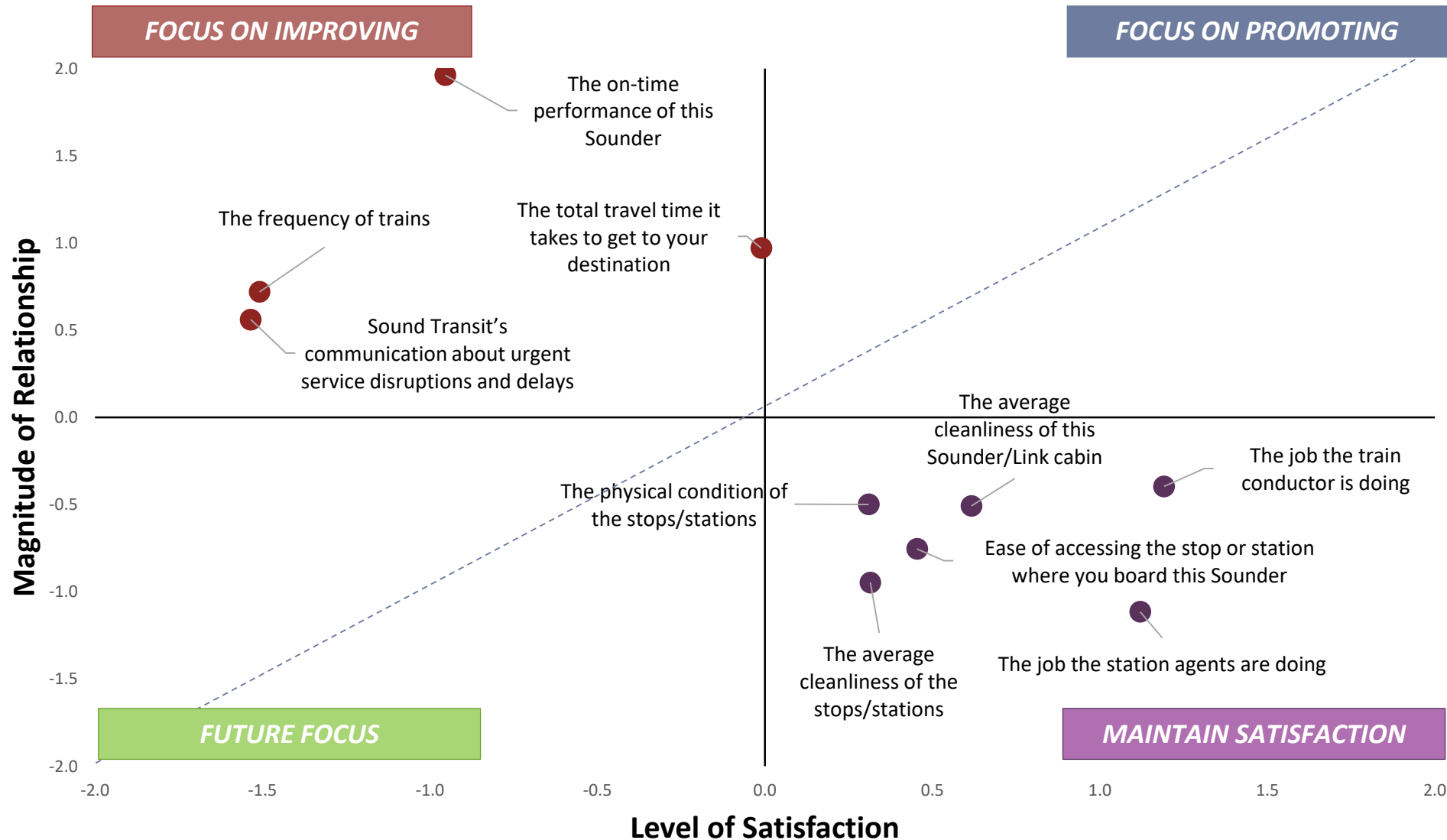
Comparing all of the service attributes for Express bus, specifically, there are a few items ST can focus on for short-term improvement. These attributes include, in order of importance:

- 1) **On-time performance**
- 2) **Express bus frequency**
- 3) **Total travel time**
- 4) **Communication about urgent service delays**

ST Express bus riders are largely satisfied with the other attributes relative to their level of importance. The physical condition and average cleanliness of stops and bus cleanliness are moderately rated but are also less important for the time being. They are worth monitoring and may become areas of focus in the long term.

Other attributes – including ease of access and operator satisfaction are all currently overperforming given their relative importance levels.

Key Driver Analysis – Sounder

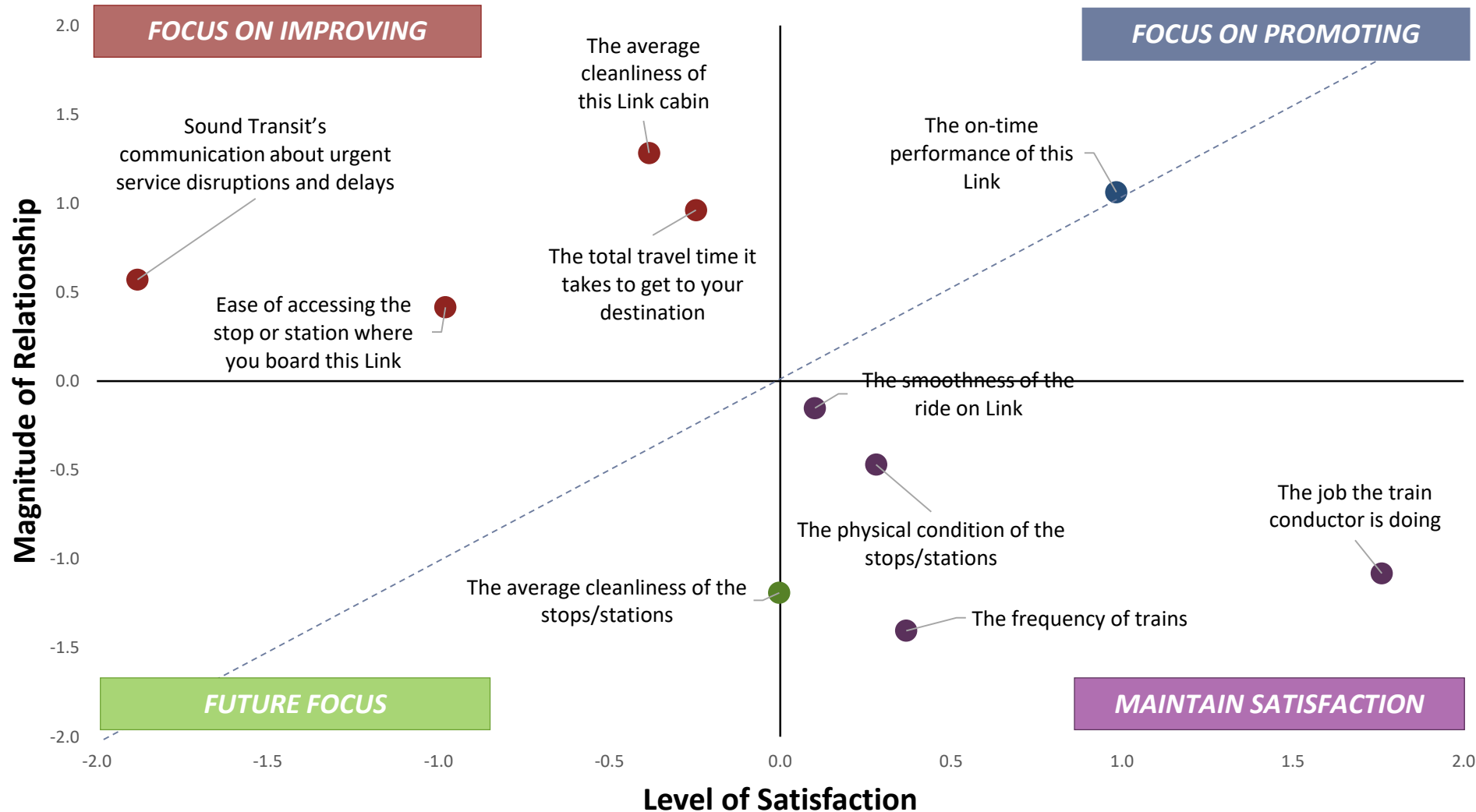


Among Sounder riders, three are a few key service attributes which the service is severely underperforming relative to their impact on overall satisfaction. It is likely these aspects which have driven declining satisfaction with the service over the last few years. Addressing these aspects should have the most immediate impacts on improving satisfaction.

- 1) **On-time performance**
- 2) **Train frequency**
- 3) **Communication about urgent service disruptions/delays**
- 4) **Total travel time**

Otherwise, Sounder is performing well on the rest of the attributes tested, though they are relatively less critical to improving satisfaction compared to the aspects listed above.

Key Driver Analysis – Link



There are a few attributes to target for improvement among Link riders, including

- 1) **Average cleanliness of cabin**
- 2) **Total travel time**
- 3) **Service disruption/delay communication**
- 4) **Ease of accessing the stations**

Other service attributes – including on-time performance, smoothness of the ride, train frequency, train conductor performance, and stop/station condition and cleanliness are rated at or above their anticipated levels of importance towards overall satisfaction with ST.

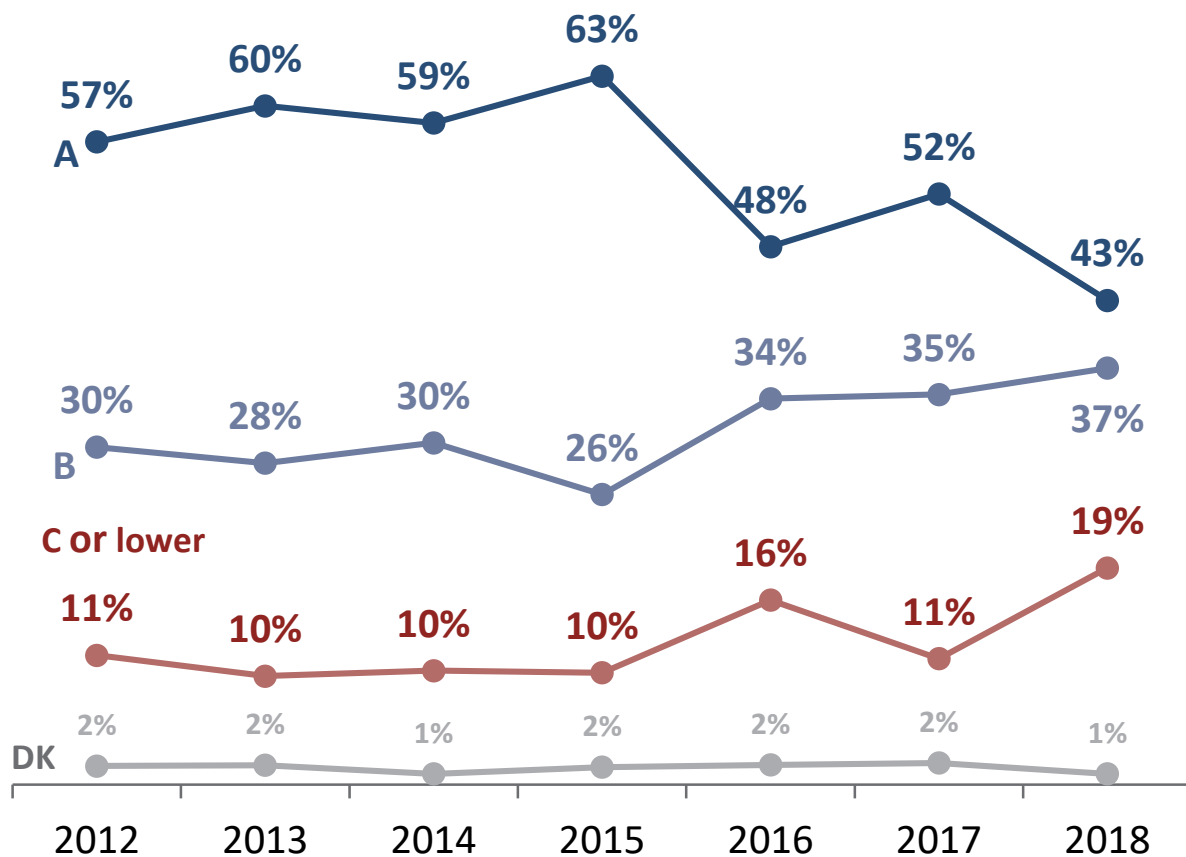


**Performance Attribute
Ratings and Grades:
Time Performance**

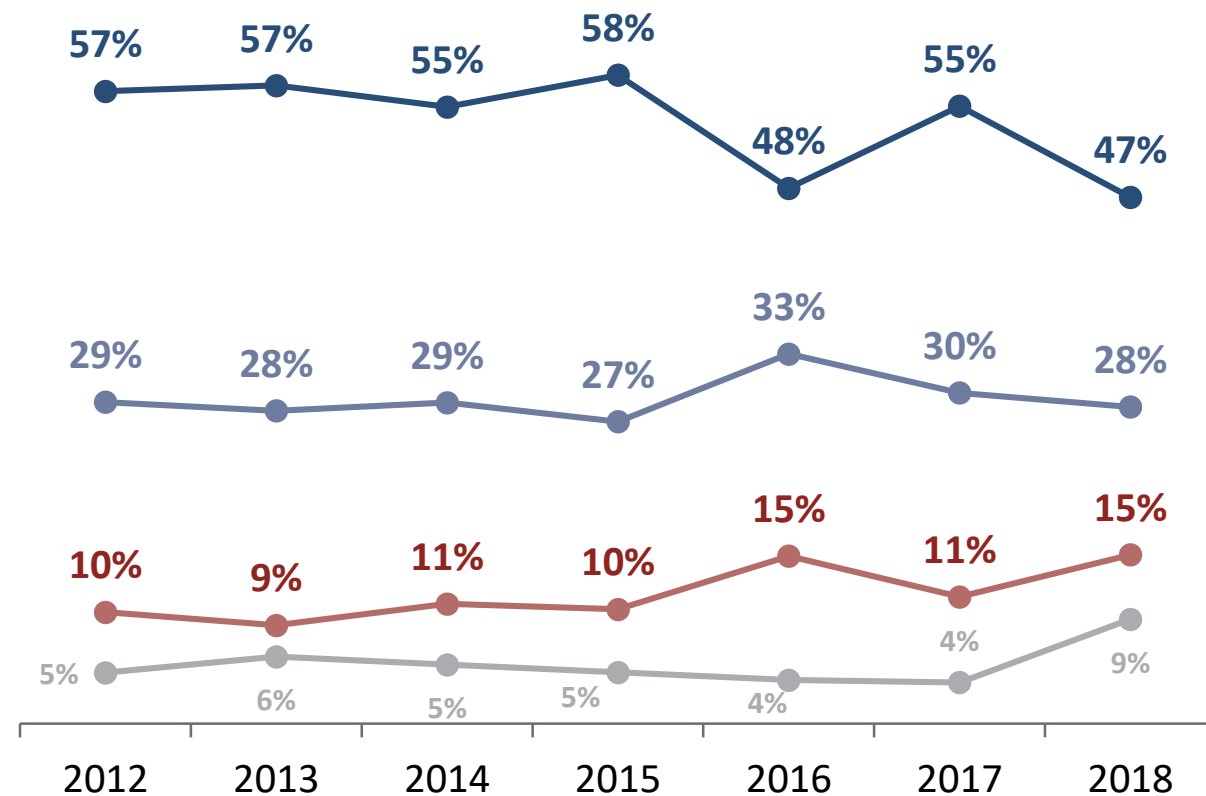
Time Satisfaction – Overall Riders Year-to-Year

Systemwide travel time and on-time performance satisfaction has seen slight ratings declines since 2015. There has been a notable uptick in C or lower grades for both of these attributes in 2018.

Travel Time Satisfaction



On-Time Satisfaction

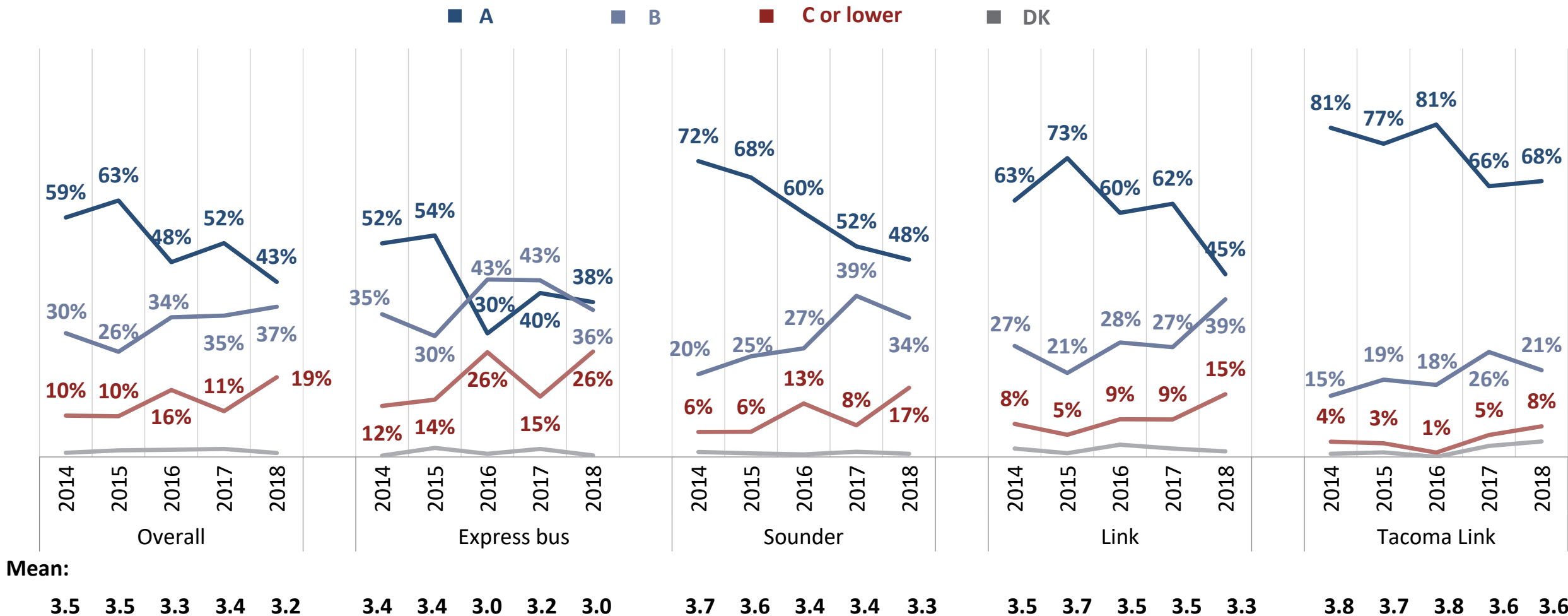


22. The total travel time it takes to get to your destination

23. The on-time performance of this (bus/Sounder/Link)

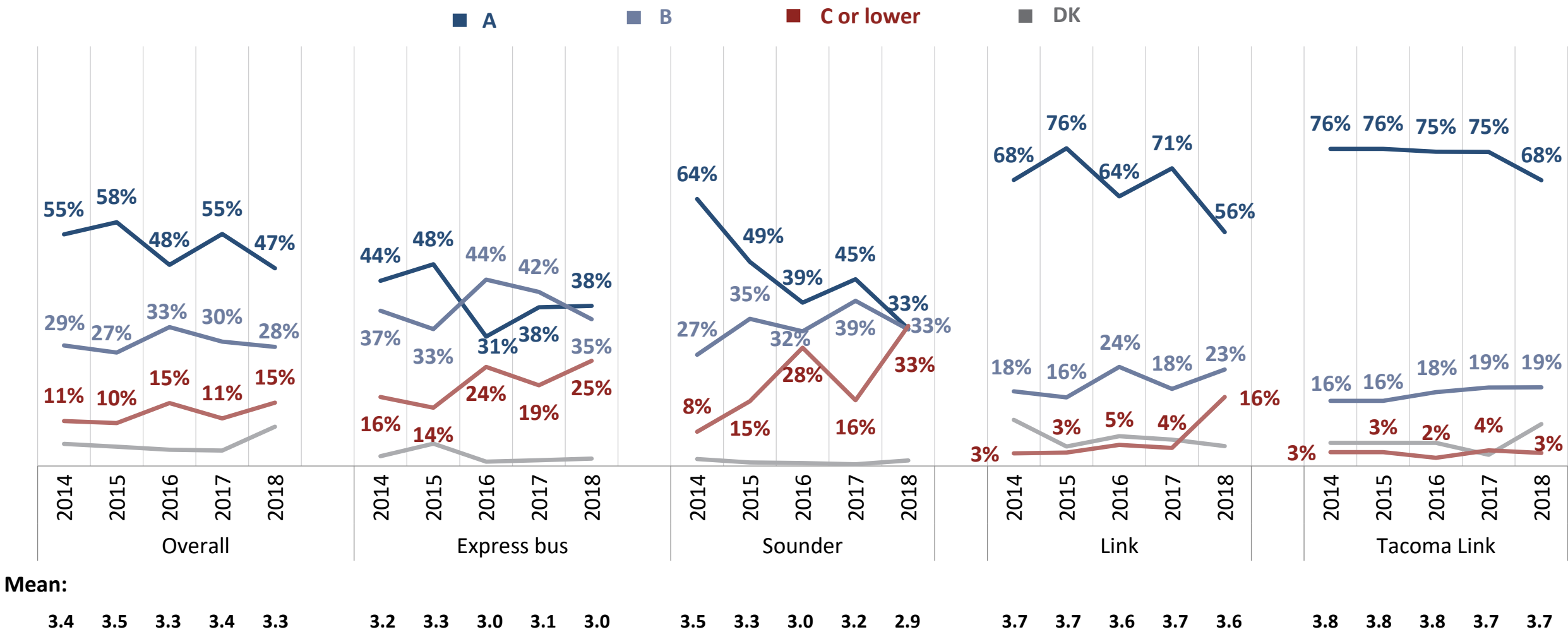
Travel Time Satisfaction by Service, Year-to-Year

By service, total travel time satisfaction has dropped for riders on all major services, particularly among Link riders where A grades have fallen 17 points since last year.



On-Time Performance by Service, Year-to-Year

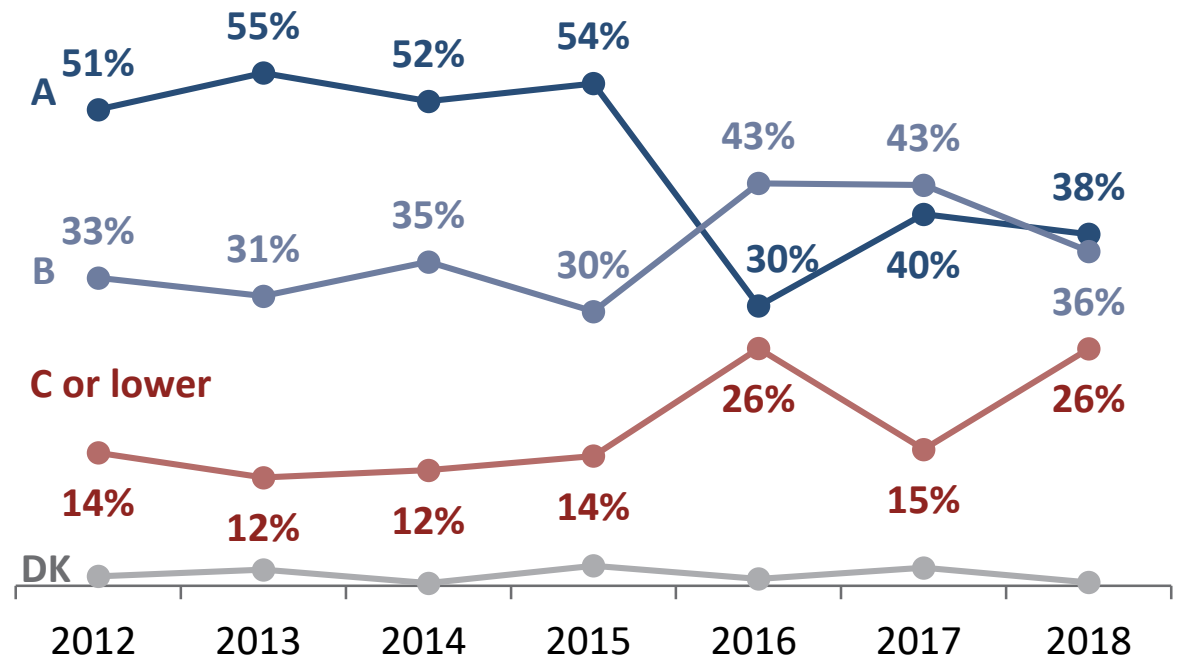
On-time performance grades have been especially volatile for Sounder and Express bus riders over the last few years; with Sounder riders reporting sharp spikes in C/lower grades in both 2016 and 2018. Riders of both Link services continue to give high OTP ratings, though their grades have also eroded slightly in 2018.



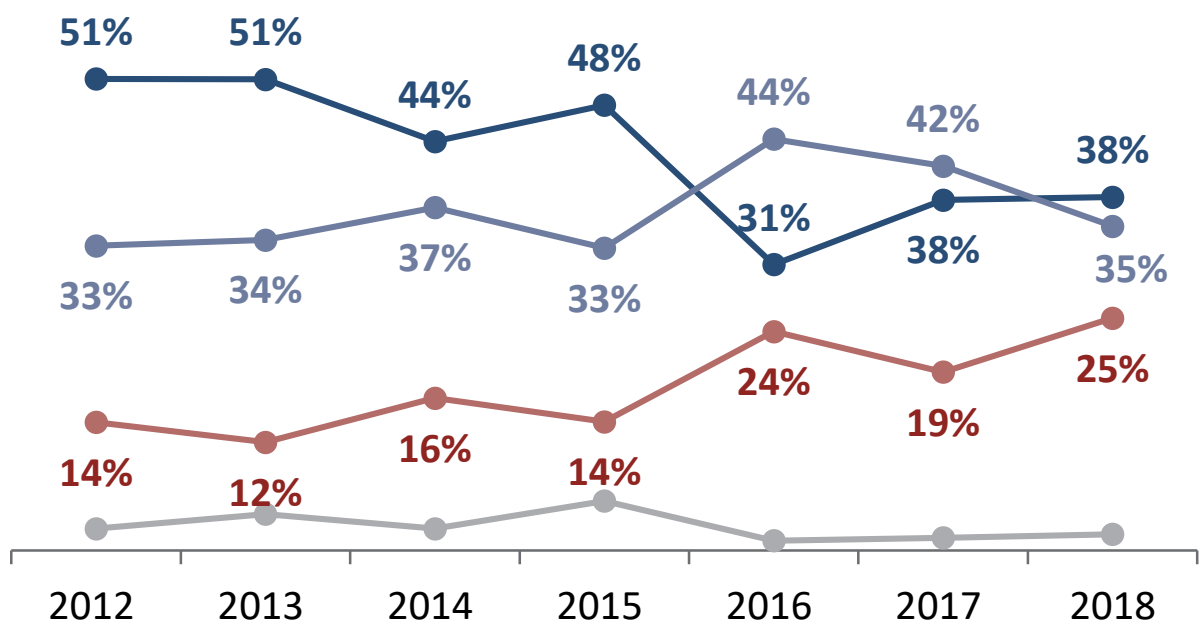
Time Satisfaction – Express Bus Riders, Year-to-Year

Satisfaction with both travel time and on-time performance have seen relatively gradual declines among Express bus riders over the last few years, with the sharpest drop occurring in 2016. About a quarter of Express bus riders rate each of these attributes as a C or lower.

Travel Time Satisfaction



On-Time Satisfaction

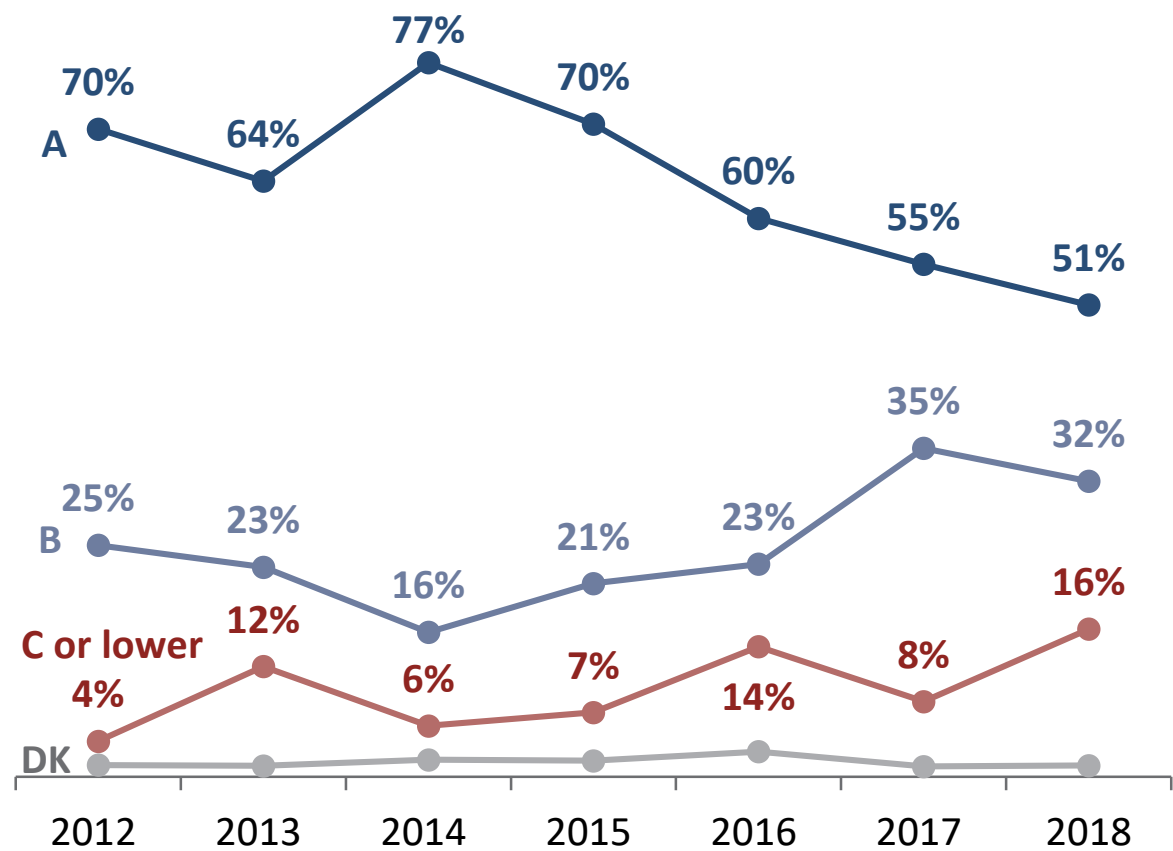


22. The total travel time it takes to get to your destination
23. The on-time performance of this (bus/Sounder/Link)

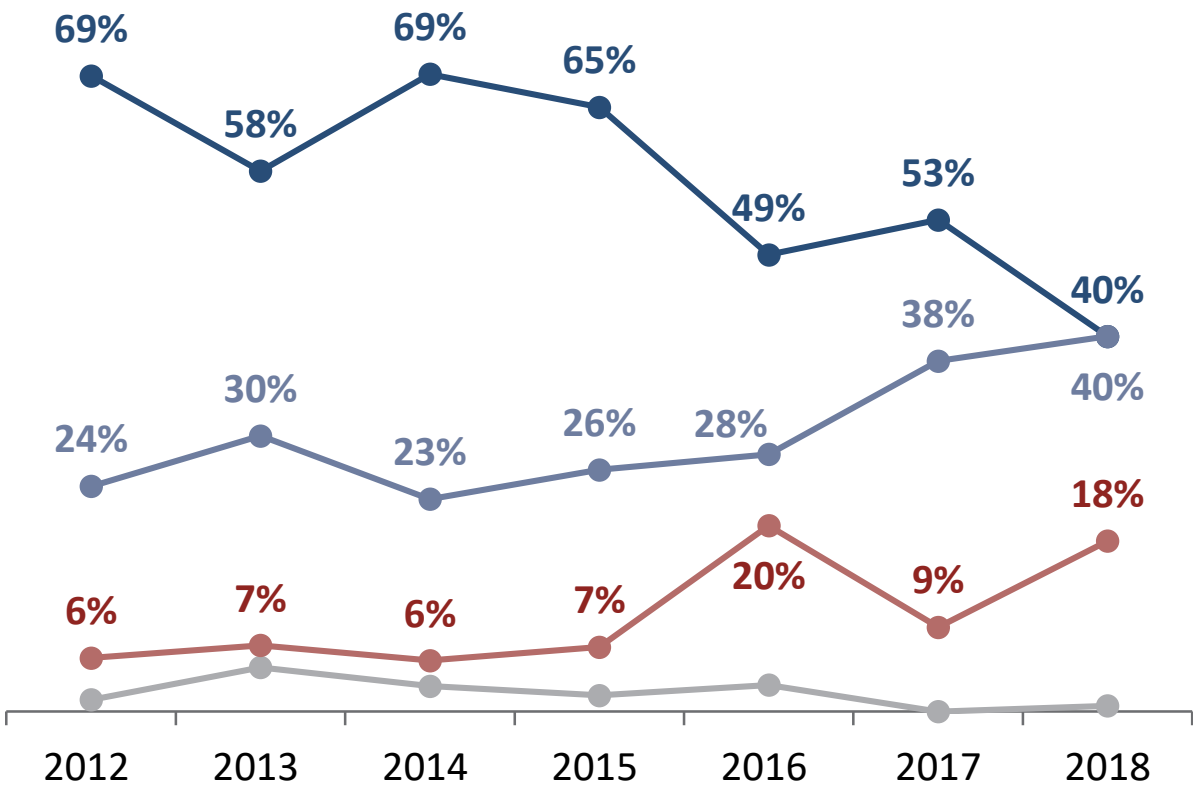
Time Satisfaction – Sounder North Riders, Year-to-Year

Travel time and on-time satisfaction ratings have steadily fallen among Northline Sounder riders since 2012.

Travel Time Satisfaction



On-Time Satisfaction

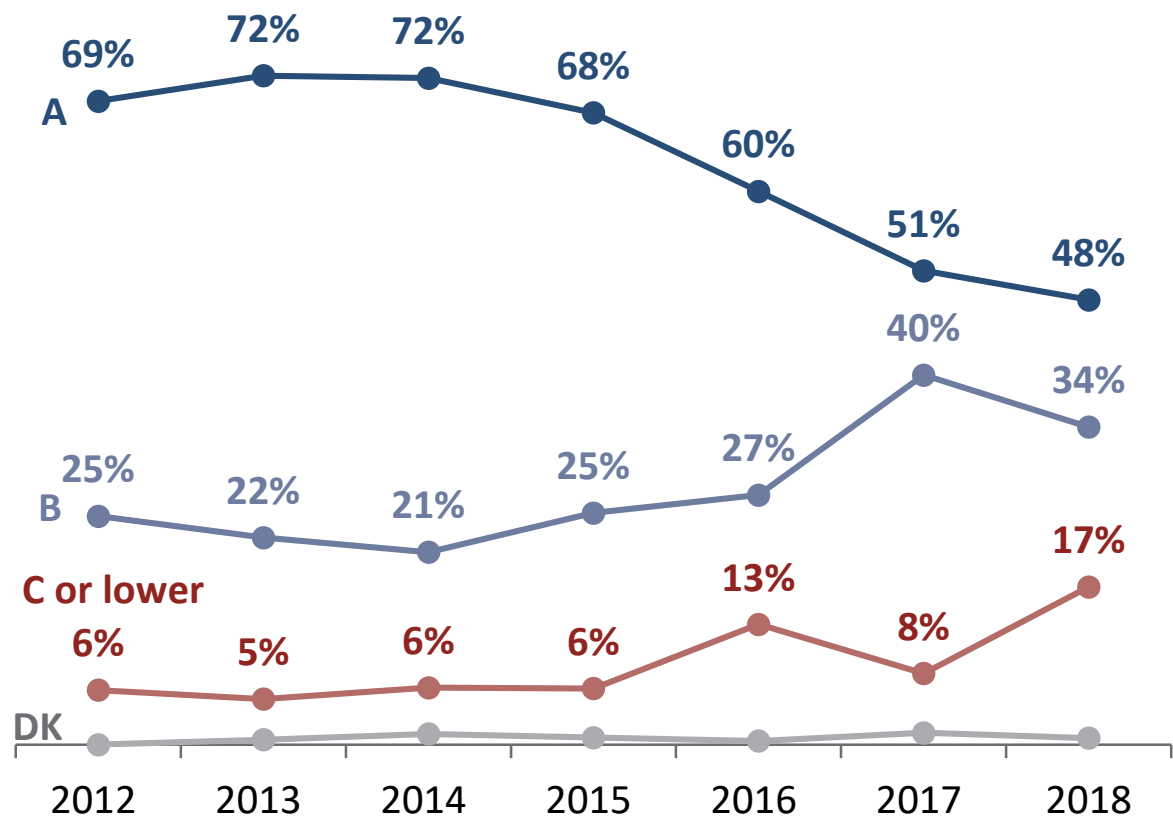


22. The total travel time it takes to get to your destination
23. The on-time performance of this (bus/Sounder/Link)

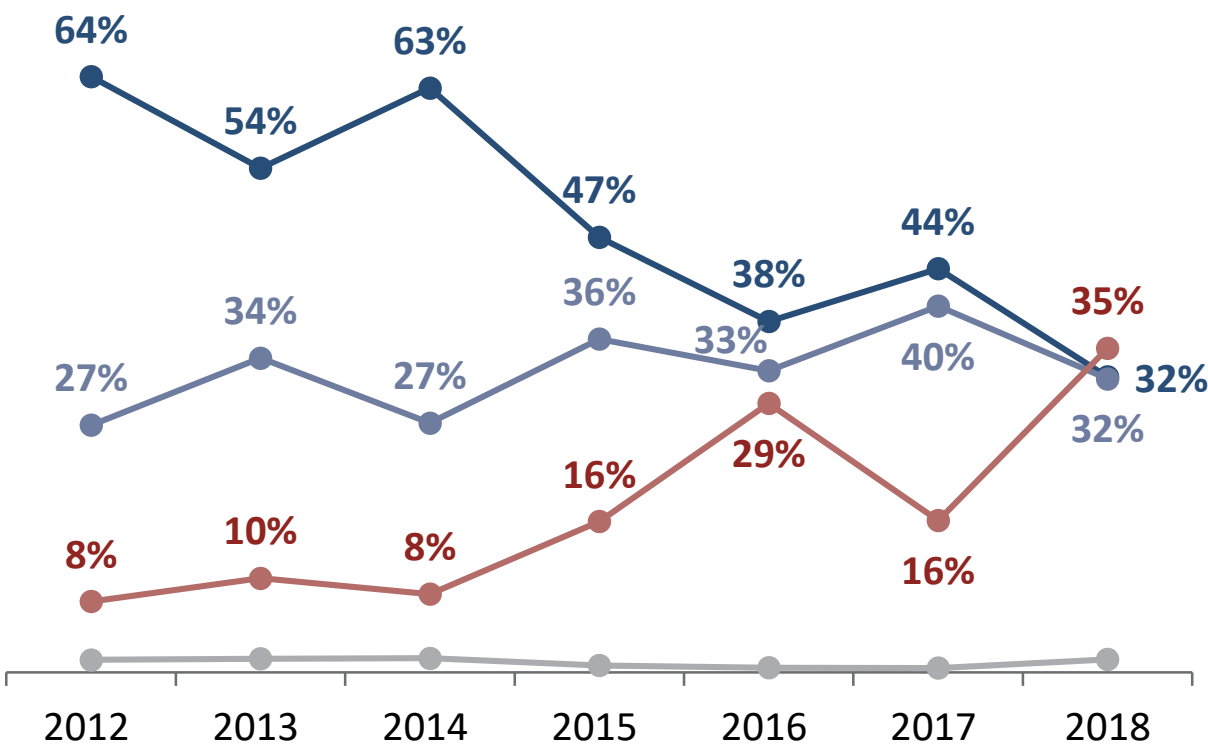
Time Satisfaction – Sounder South Riders, Year-to-Year

For Sounder South riders, on-time performance grades have been highly volatile over the last few years, with a plurality rating the attribute a C or lower for the first time in 2018. Travel time satisfaction has seen more gradual declines during this time.

Travel Time Satisfaction



On-Time Satisfaction

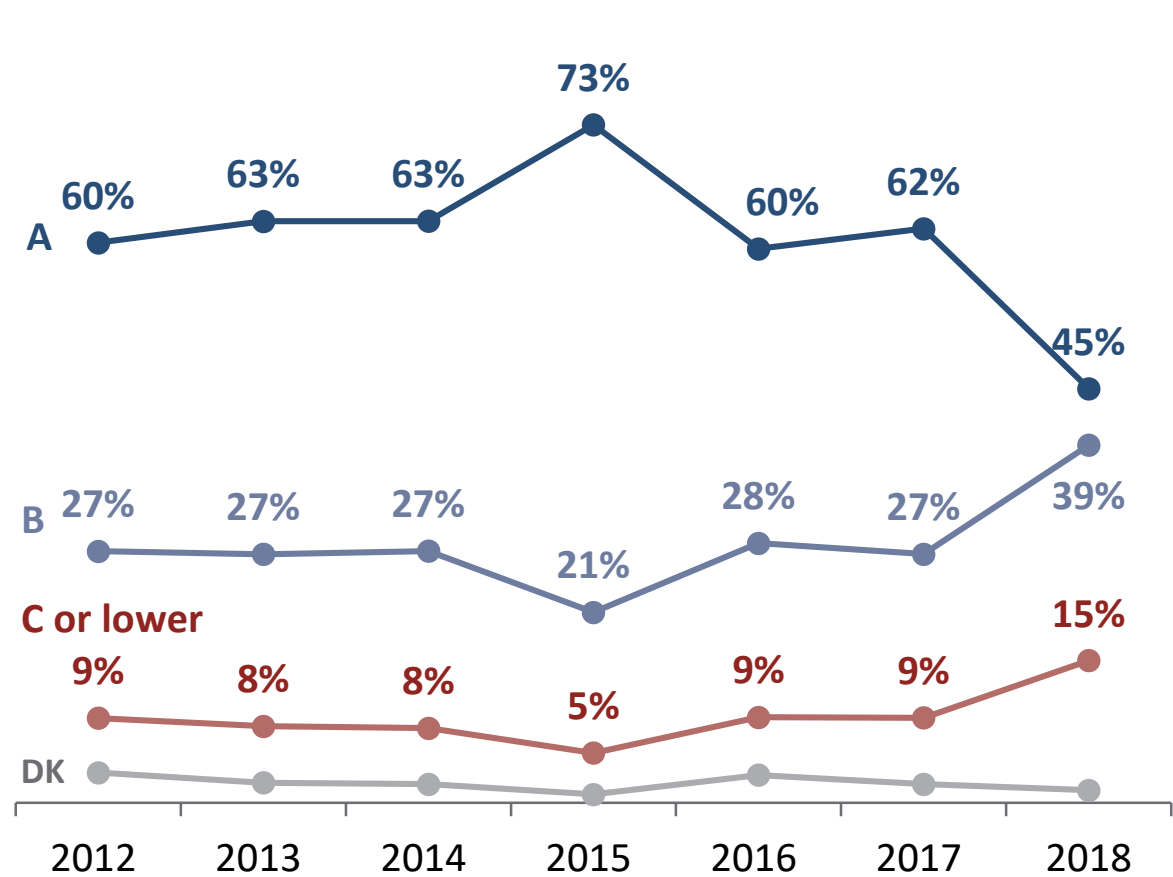


22. The total travel time it takes to get to your destination
23. The on-time performance of this (bus/Sounder/Link)

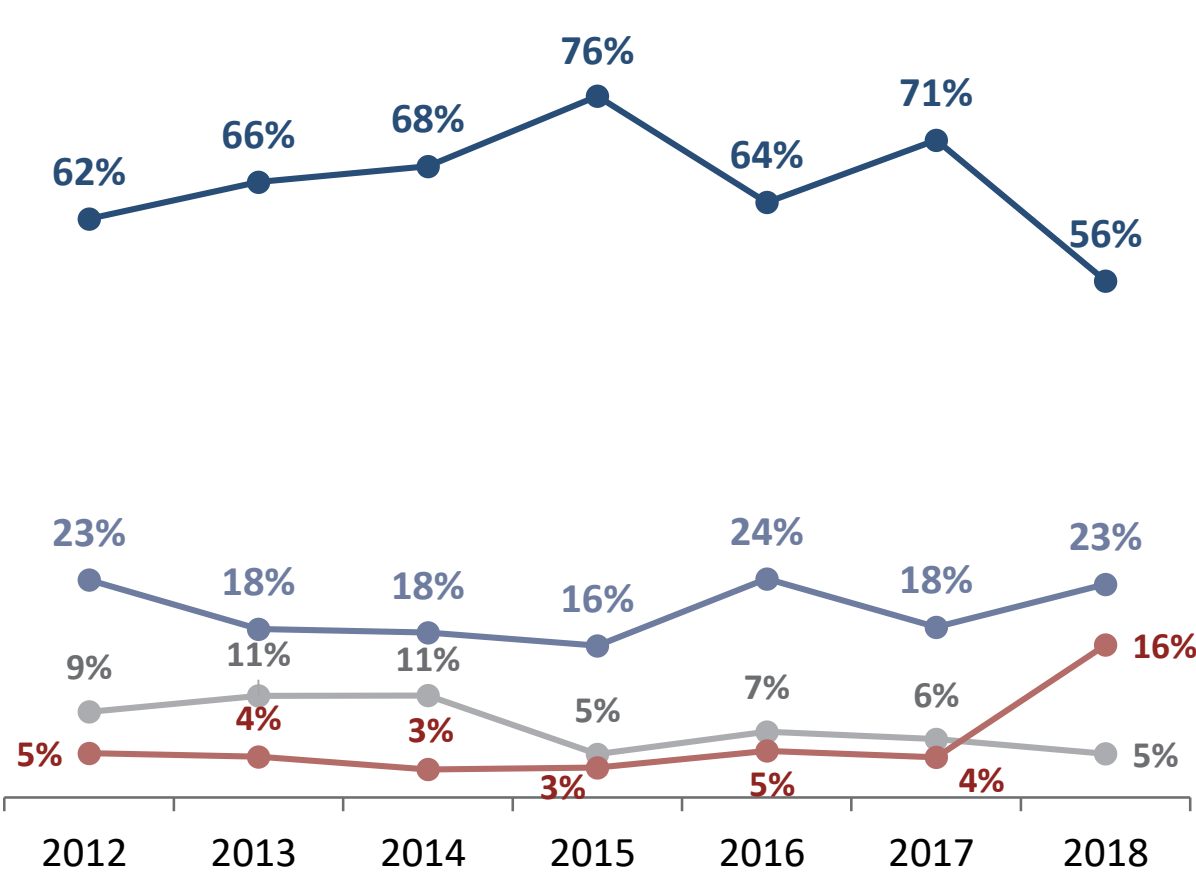
Time Satisfaction – Link Riders, Year-to-Year

Following a peak in travel time and on-time satisfaction in 2015, grades for both attributes have seen some volatility since the U-Link expansion, with particularly sharp drops in 2018.

Travel Time Satisfaction



On-Time Satisfaction

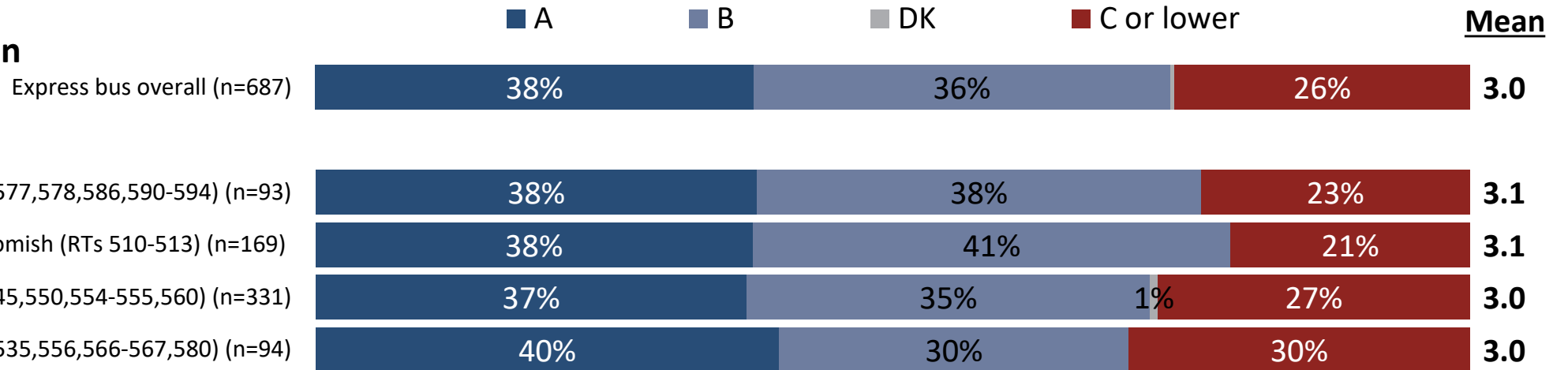


22. The total travel time it takes to get to your destination
23. The on-time performance of this (bus/Sounder/Link)

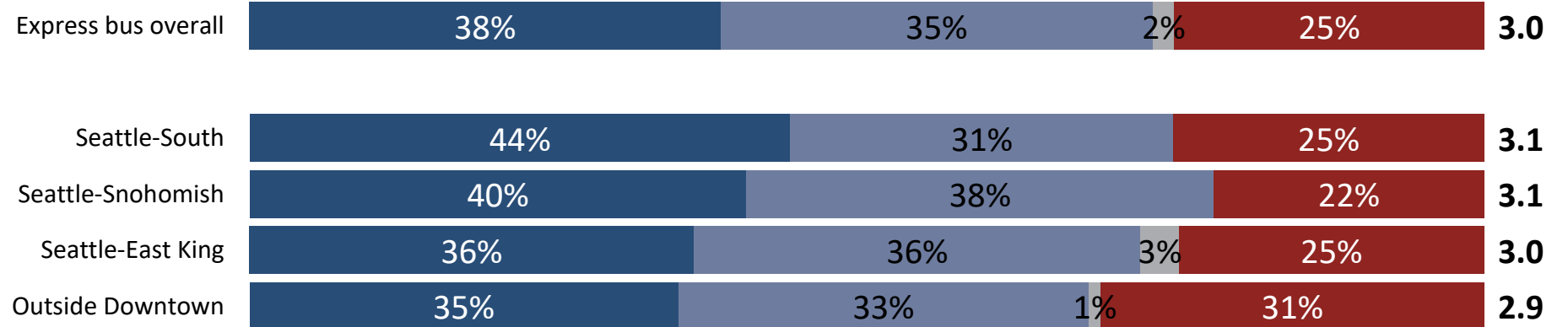
Express Bus Time Satisfaction – by Route Groupings

Travel time and on-time performance ratings are highly consistent across regional route groupings.

Travel Time Satisfaction



On-Time Satisfaction

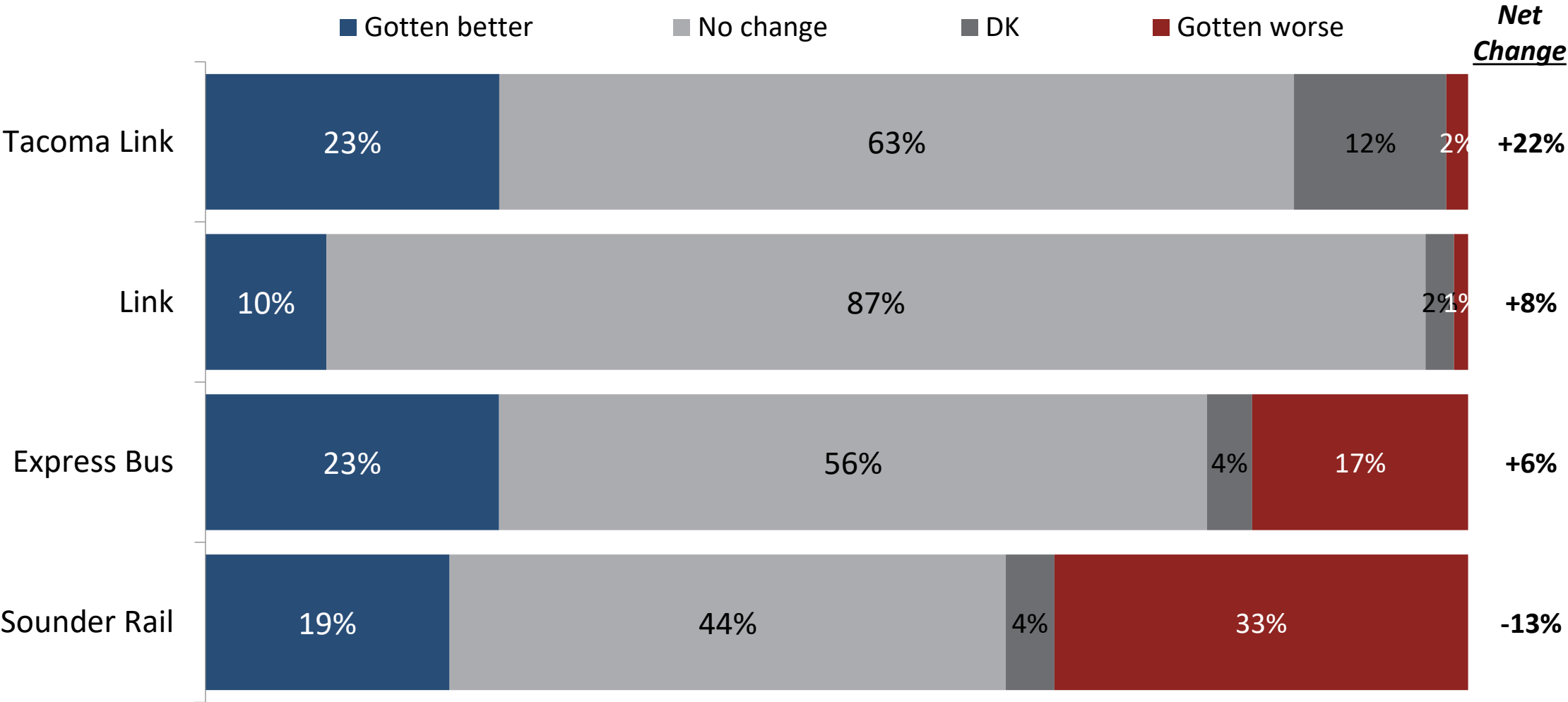


22. The total travel time it takes to get to your destination

23. The on-time performance of this (bus/Sounder/Link)

Change in On-time Performance by Service

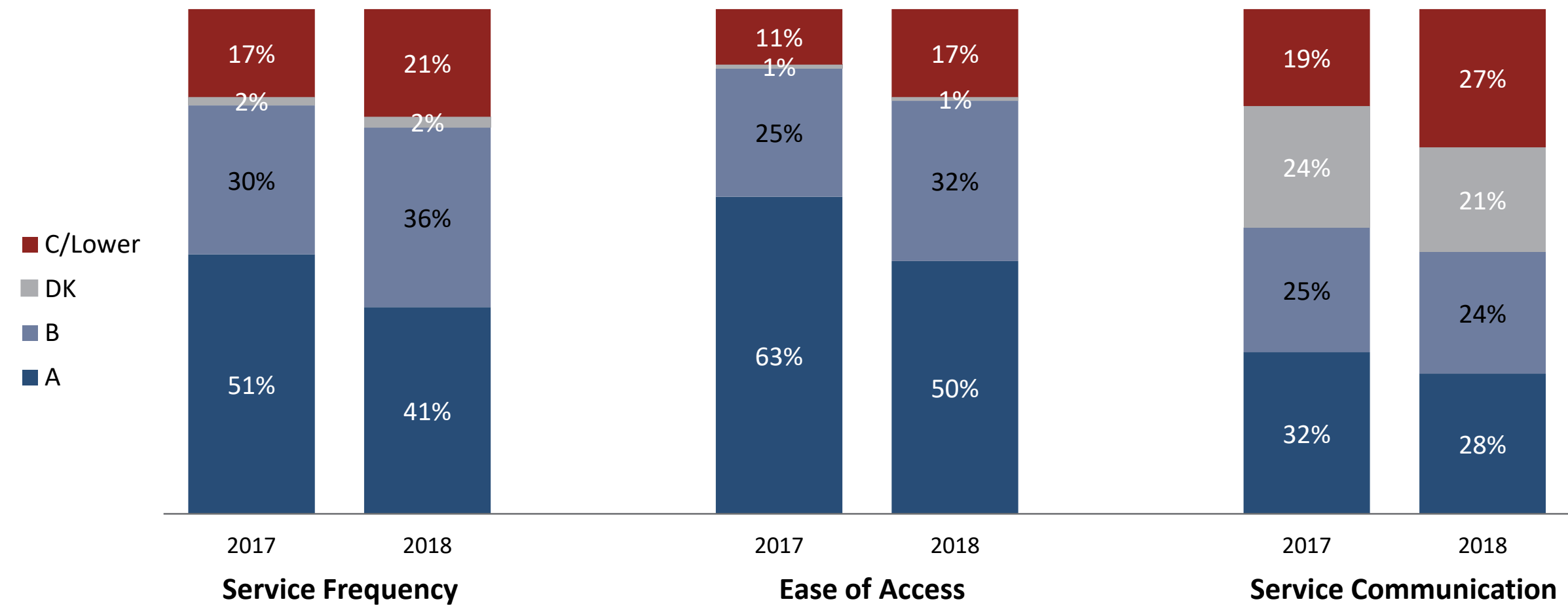
Although most riders haven't noticed a change in on-time performance, about a third of Sounder riders say it has gotten worse in the last year.



28. In the last year, would you say the on time performance of this (bus/Sounder/Link) has gotten better, gotten worse, or have you not noticed a change? (n=524)

Ease of Access, Service Frequency & Communication - Tracking

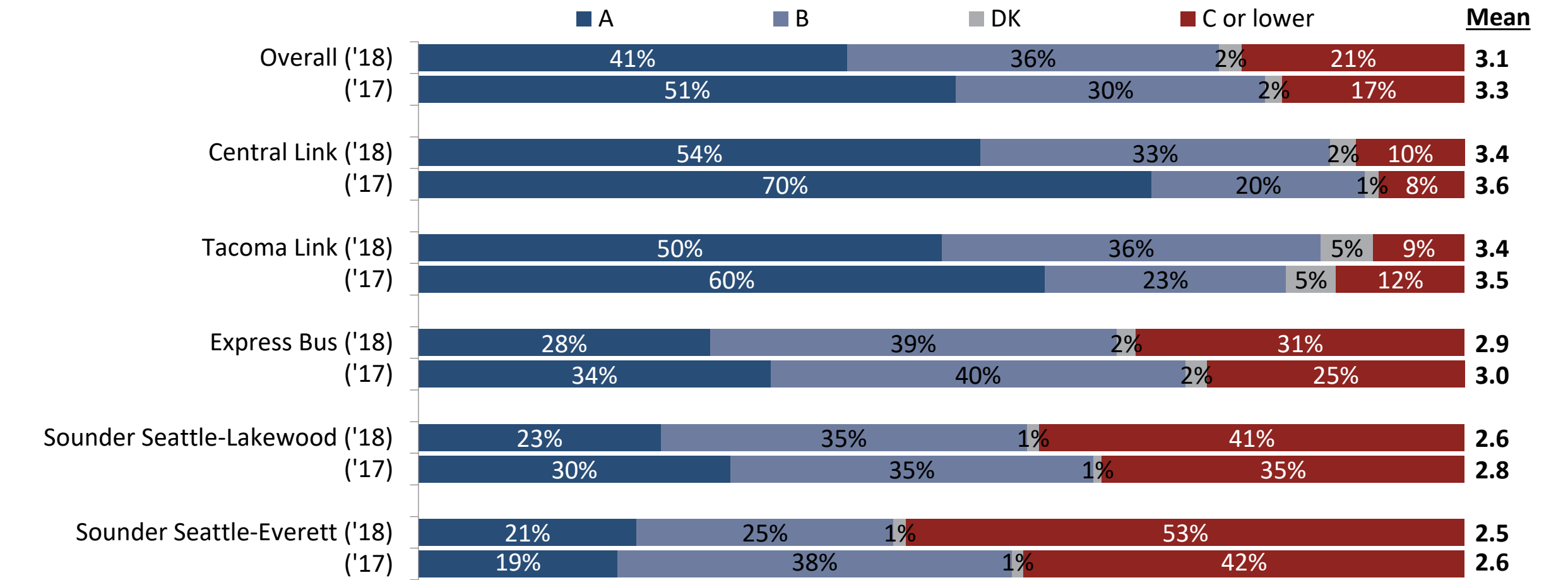
Service frequency, ease of access, and service communication satisfaction have each seen slight ratings declines between 2017 and 2018.



Q24-26. Using a scale of A through F, where A means excellent, C means average, and F means failing, how would you grade...

Service Frequency Satisfaction – Tracking

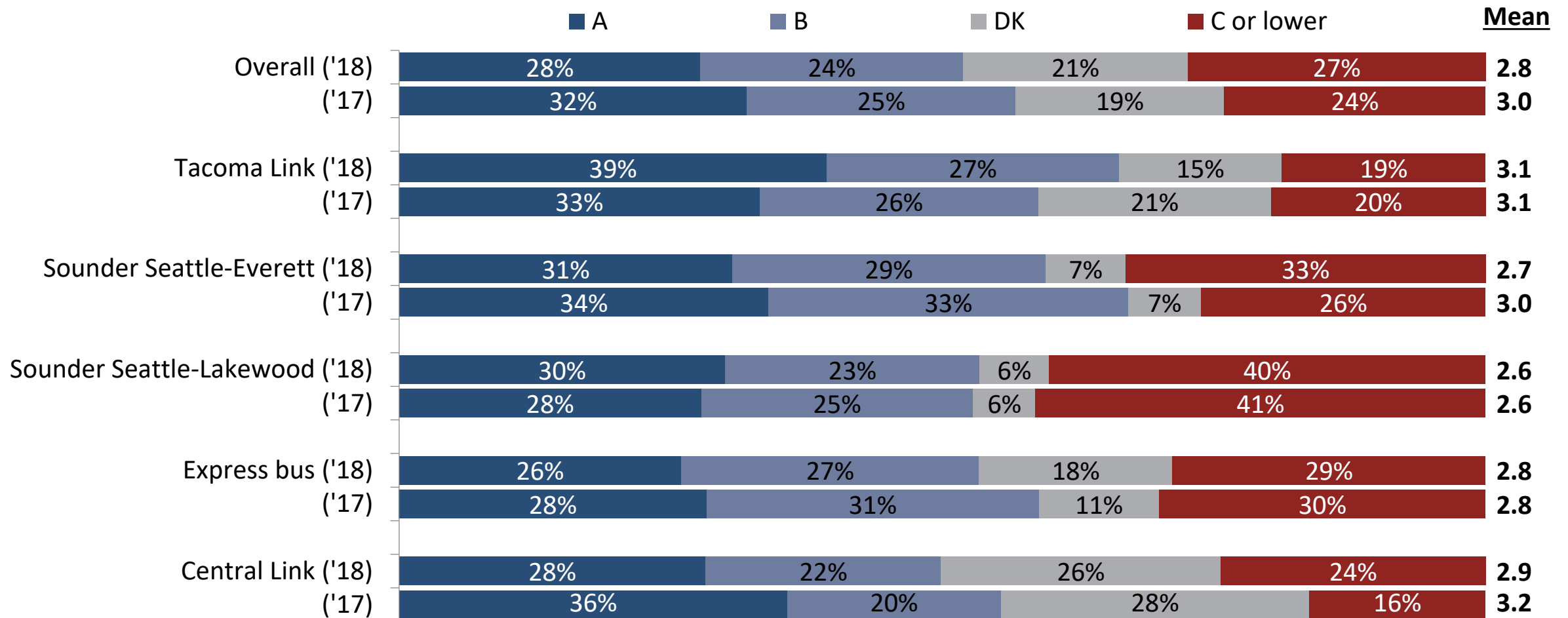
Service frequency satisfaction is lowest among Sounder riders, with more than two-in-five giving the attribute a C or lower grade for both North and South lines. A third of Express bus riders also give service frequency a lower rating. Satisfaction intensity (A grades) among Link riders have also declined since 2017, though very few give lower grades for service frequency.



Q24. Using a scale of A through F, where A means excellent, C means average, and F means failing, how would you grade: The frequency of (buses/trains)

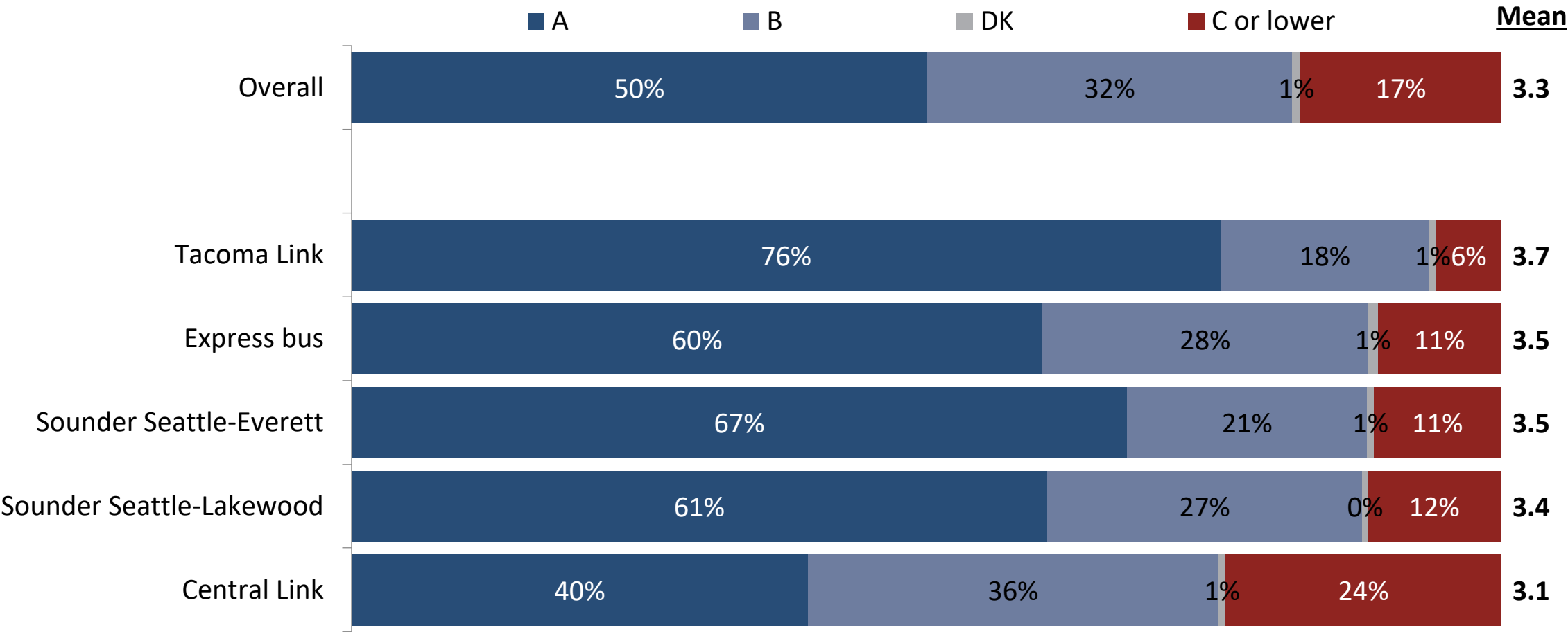
Service Communication Satisfaction – Tracking

Urgent communication about service disruptions and delays is among the lowest-rated attributes tested. More than two-in-five Sounder and Express bus riders give this attribute a C or lower rating.



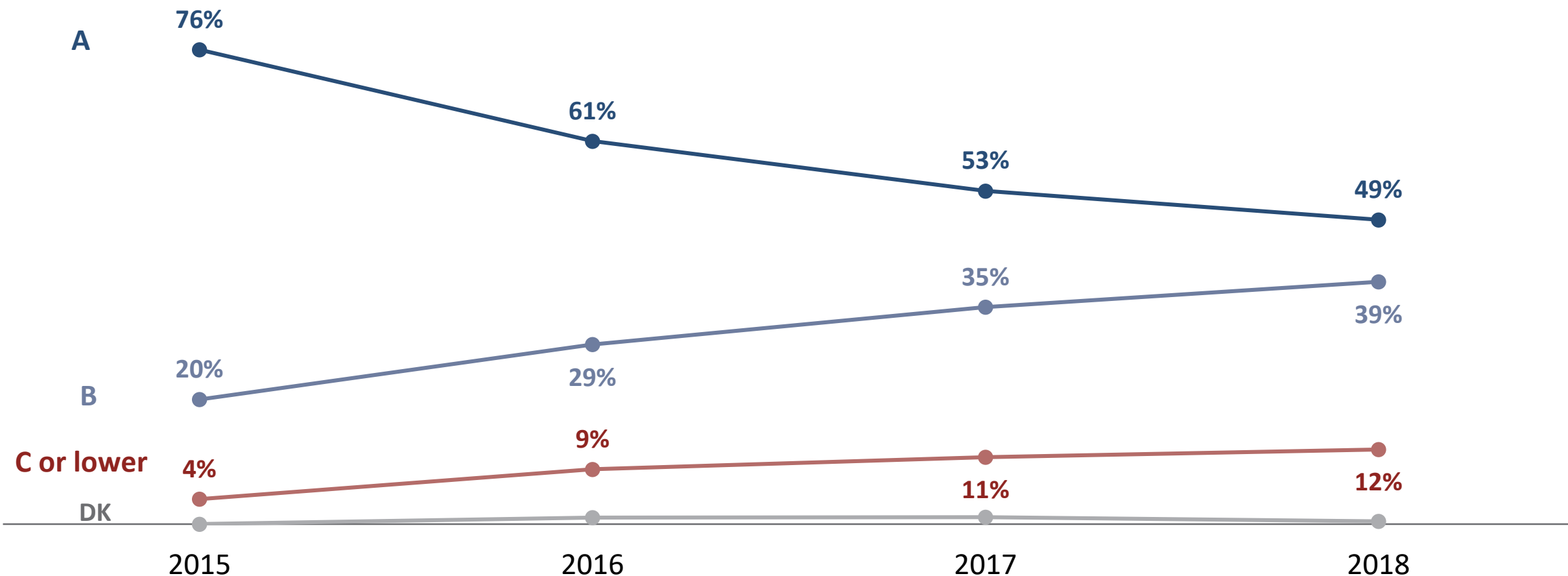
Ease of Access Satisfaction

Riders on most of ST's services are generally satisfied with the ease of accessing each service. These ratings are lowest among Link riders with a quarter giving the attribute a C or lower grade.



The Smoothness of the Ride on Link

The intensity of satisfaction (A grades) of the smoothness of the ride on Link has steadily dropped since 2015 but still remain largely positive (B grades). Lower ratings (C/lower) have stayed relatively minimal during this time.



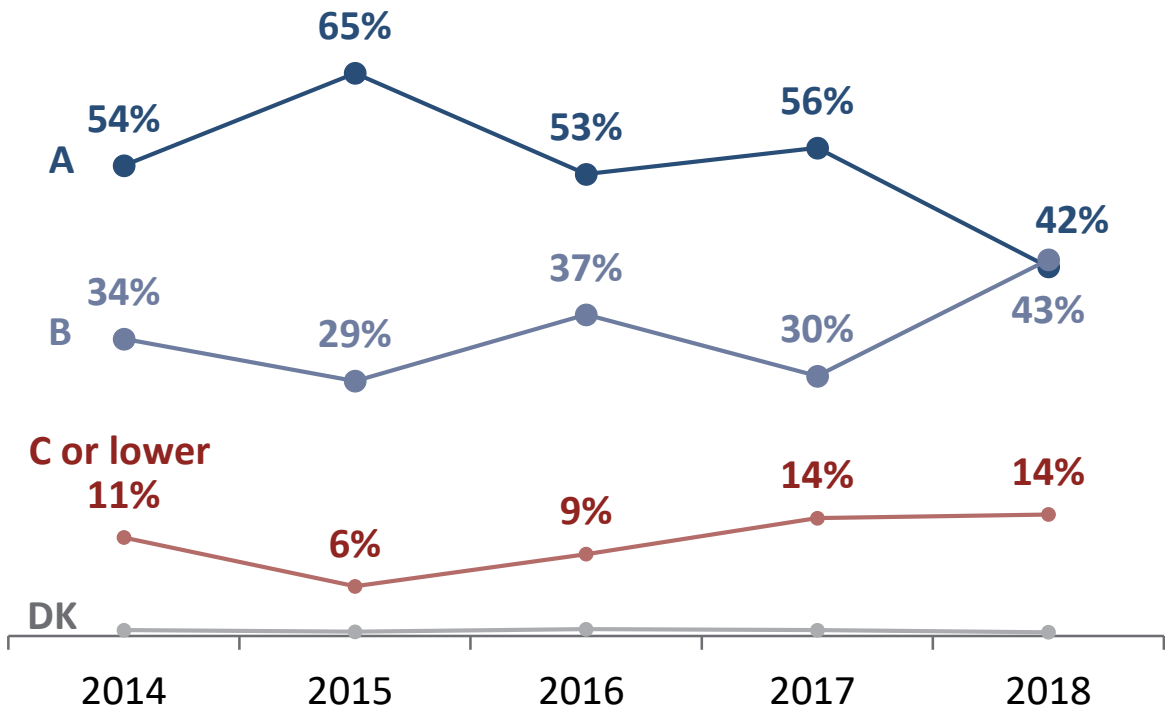


Performance Attribute Ratings and Grades: Cleanliness

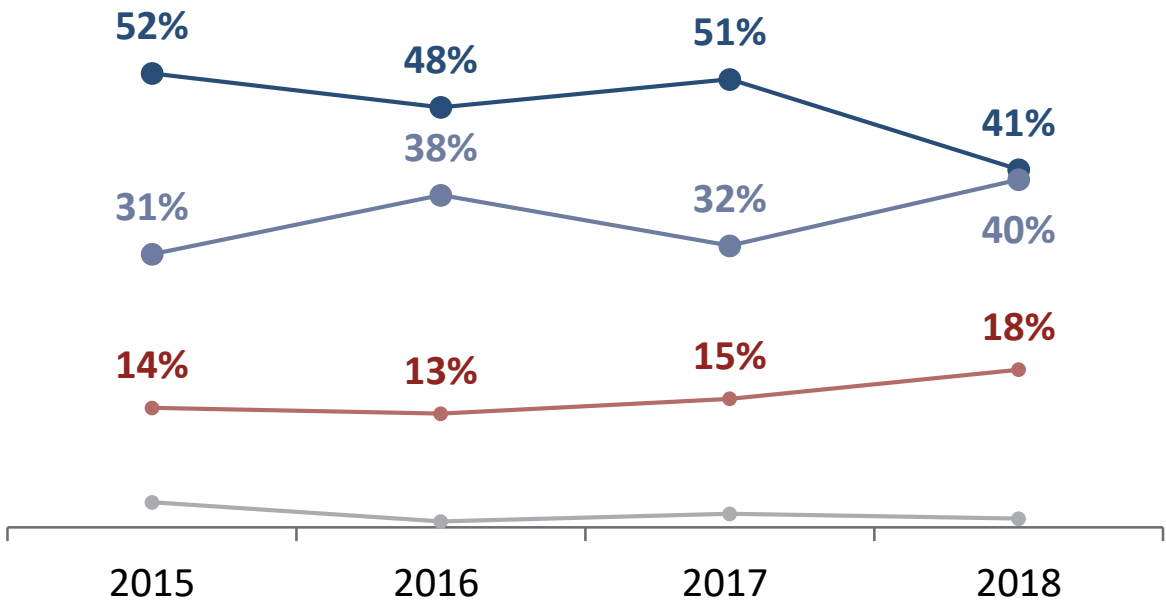
Stop/On-Board Cleanliness – Overall Riders, Year-to-Year

Among overall systemwide riders, on board and stop/station cleanliness ratings have seen relatively gradual drops since 2014.

On-Board Cleanliness – Overall riders



Stop/Station Cleanliness – Overall riders

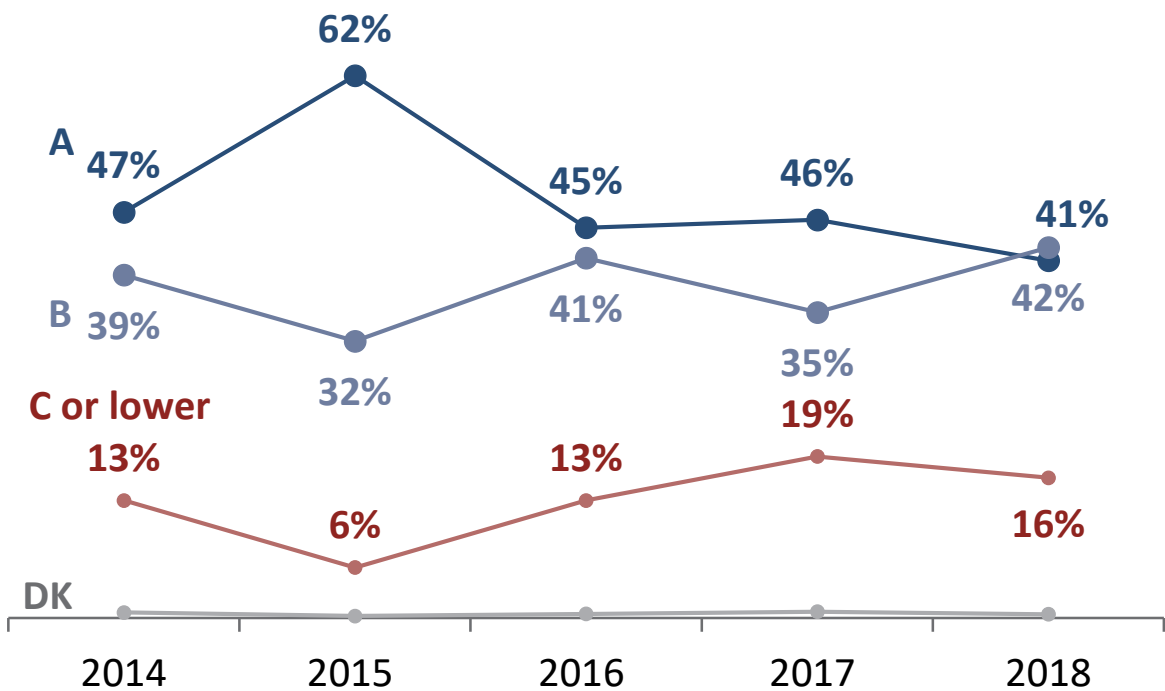


14. The average cleanliness of this (bus/Sounder/Link) cabin
15. The average cleanliness of the (bus stops/train stations)

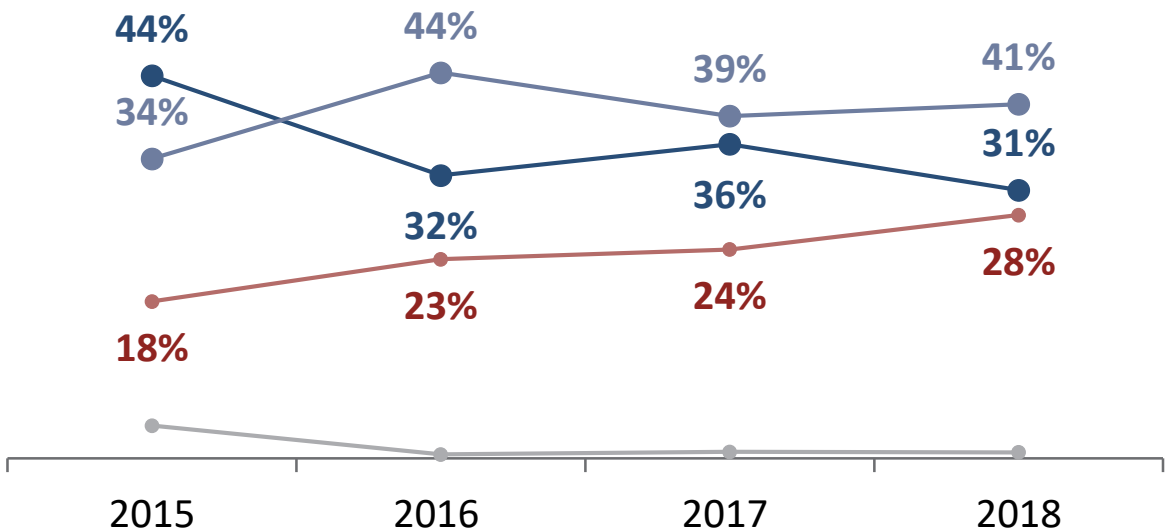
Stop/On-Board Cleanliness – Express Bus Riders, Year-to-Year

For Express bus riders, cleanliness ratings have remained fairly consistent apart from ratings spikes in 2015.

On-Board Cleanliness –
Express bus



Stop/Station Cleanliness –
Express bus

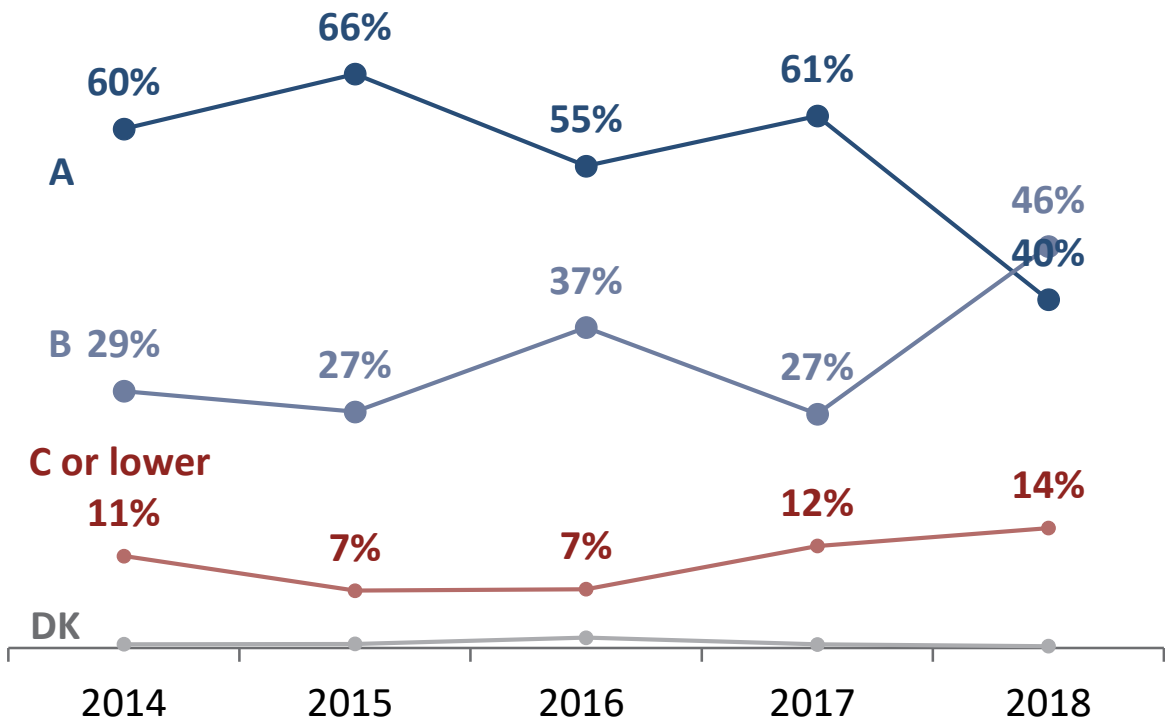


14. The average cleanliness of this (bus/Sounder/Link) cabin
15. The average cleanliness of the (bus stops/train stations)

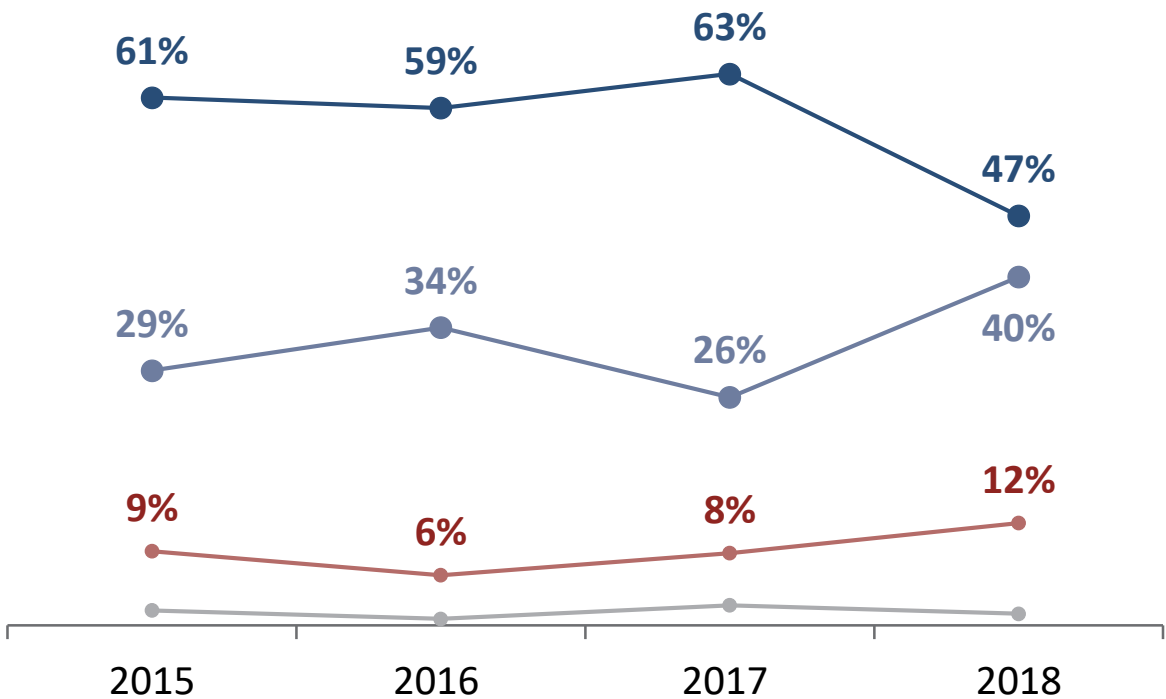
Station/On-Board Cleanliness – Link Riders, Year-to-Year

Link riders have reported the sharpest drop in satisfaction intensity (A grades) between 2017 and 2018. Most of this shift has gone into B grades and has not translated to a significant influx of negative C/lower grades.

On-Board Cleanliness –
Link light rail



Stop/Station Cleanliness –
Link light rail

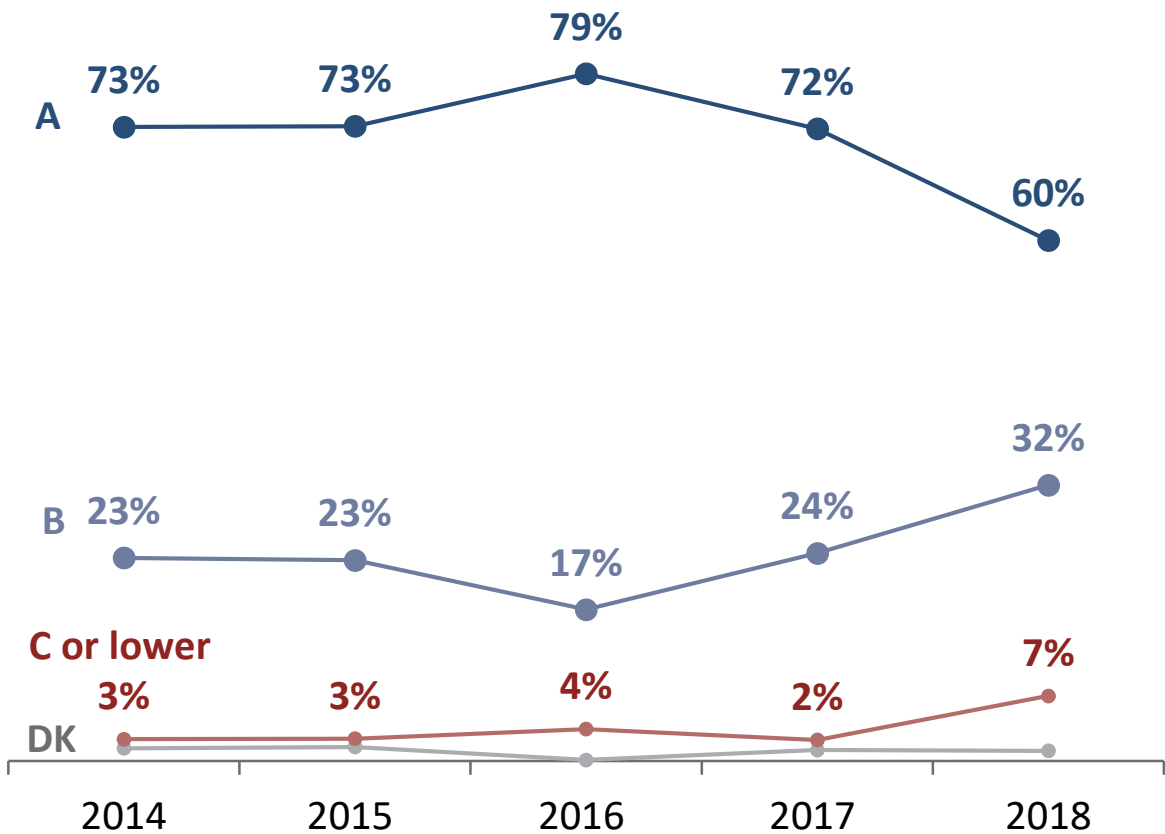


14. The average cleanliness of this (bus/Sounder/Link) cabin
15. The average cleanliness of the (bus stops/train stations)

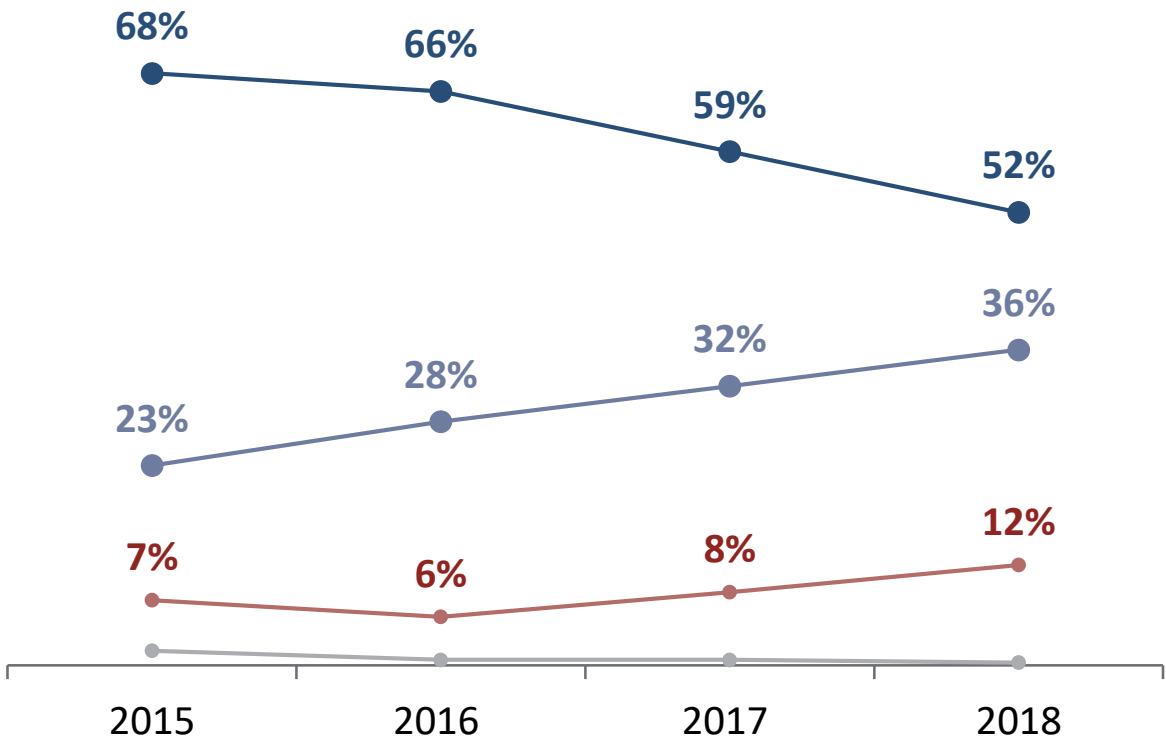
Station/On-Board Cleanliness – Sounder Riders, Year-to-Year

Cleanliness grades have also seen gradual declines among Sounder riders, both on-board and at stops/stations.

On-Board Cleanliness - Sounder



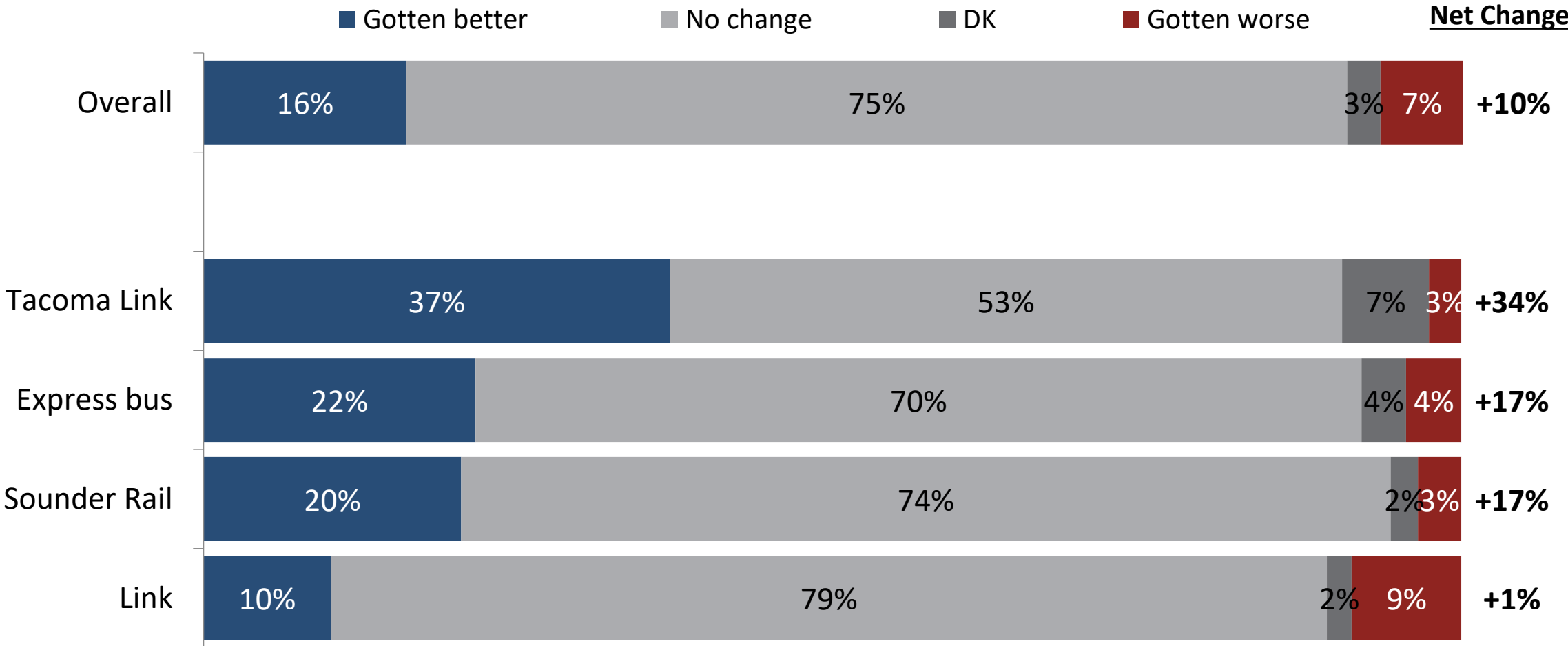
Stop/Station Cleanliness - Sounder



14. The average cleanliness of this (bus/Sounder/Link) cabin
15. The average cleanliness of the (bus stops/train stations)

Change in Vehicle Cleanliness by Service

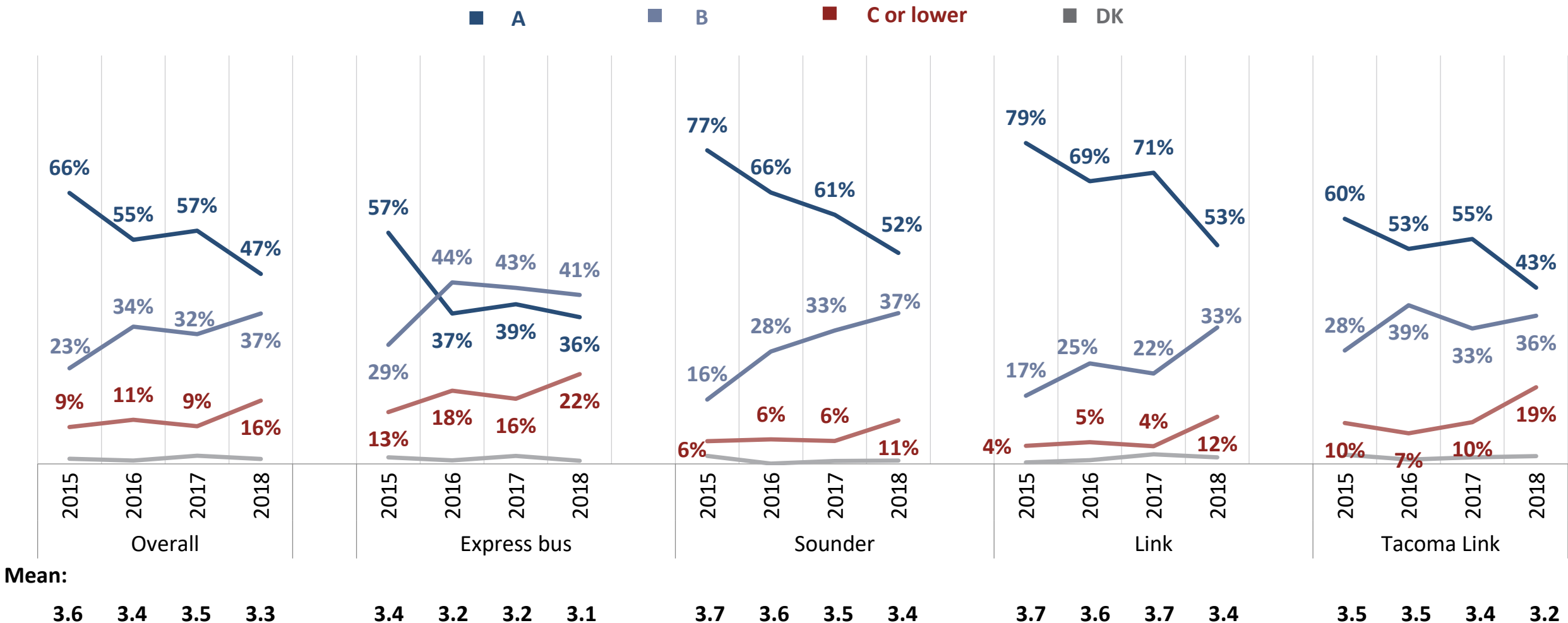
Despite declines in most on-board cleanliness grades among riders of each service, a strong majority have not noticed a change over the last year. Over a third of Tacoma Link riders have actually reported improvements in vehicle cleanliness since 2017.



27. In the last year, would you say that the cleanliness of this vehicle/cabin has gotten better, gotten worse, or have you not noticed a change? (n=1418)

Physical Condition of Stops/Stations

Ratings for the physical condition of stops and stations ahs dropped steadily across all ST services since 2015.

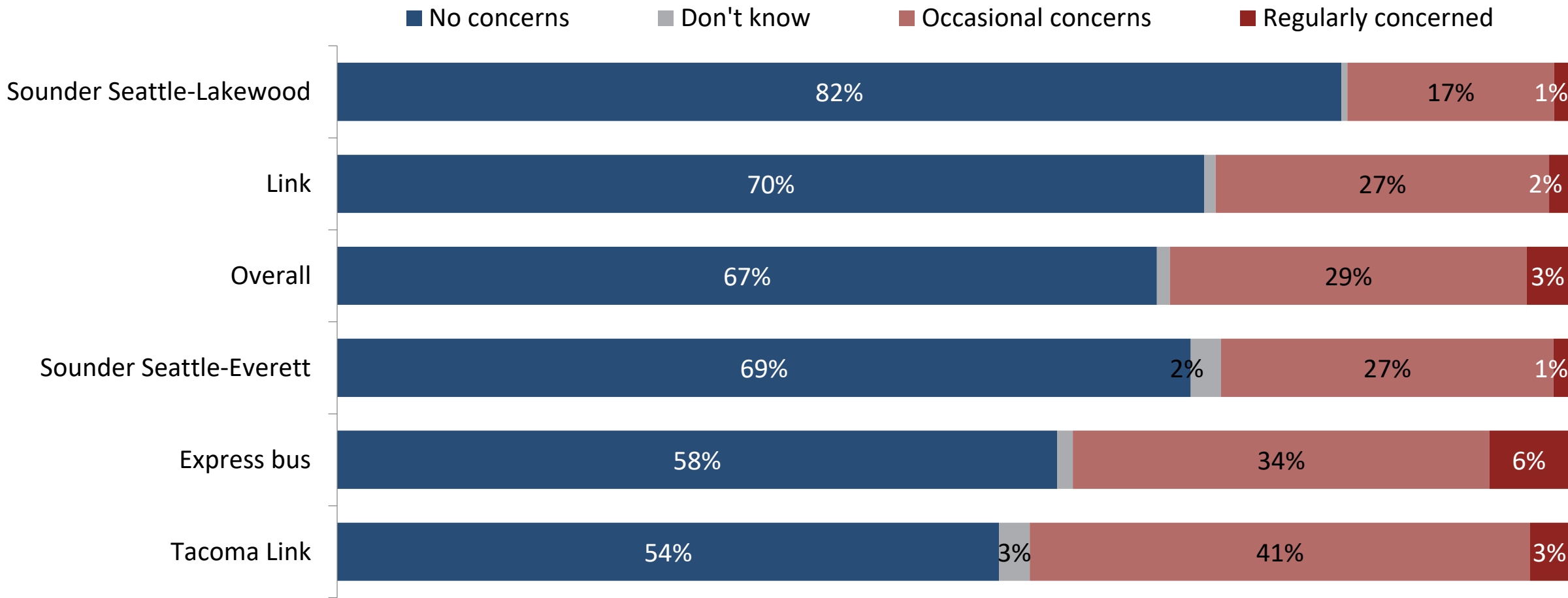




**Performance Attribute
Ratings and Grades:
Safety**

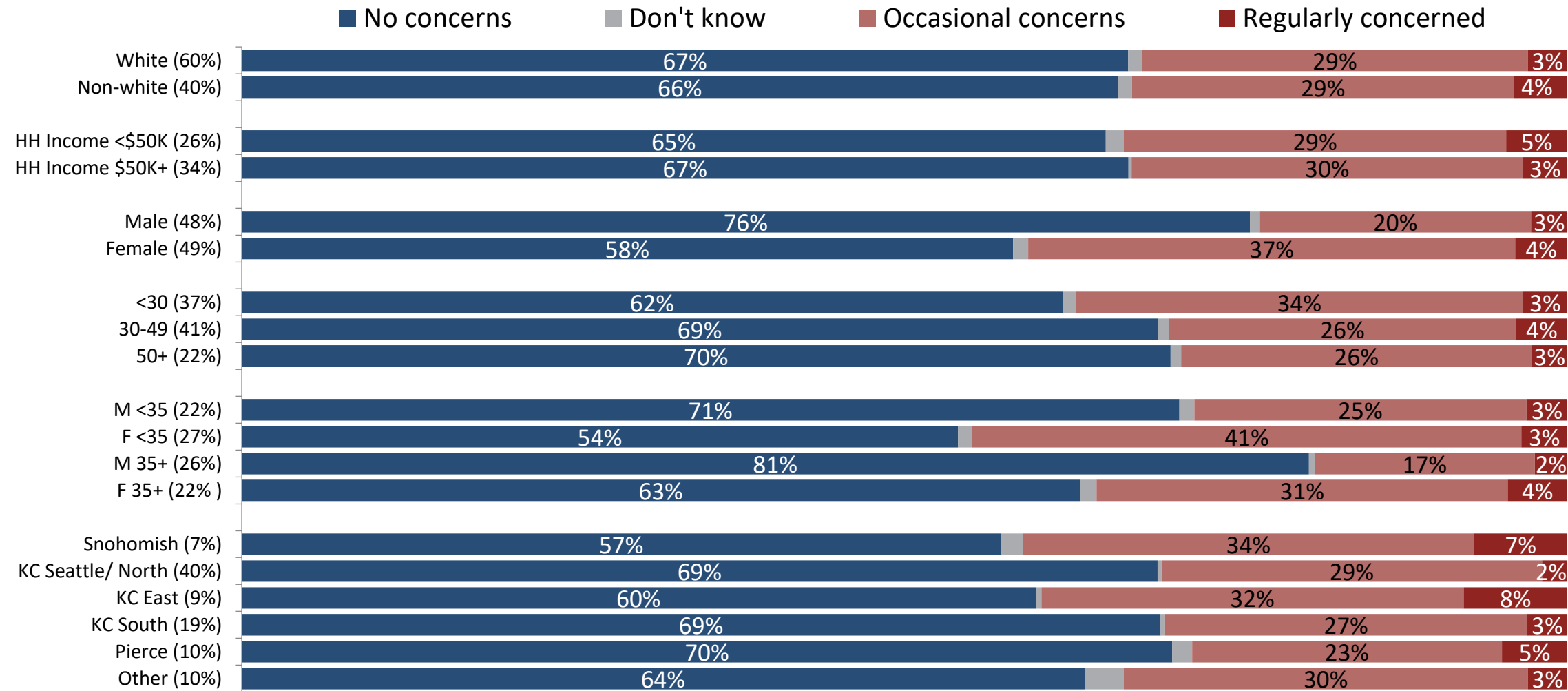
Safety at Stop/Station – by Service

A majority of riders on every service report no concerns for their safety while waiting for the bus or train. However, one-in-twenty Express bus riders are regularly concerned about their safety at stops/stations.



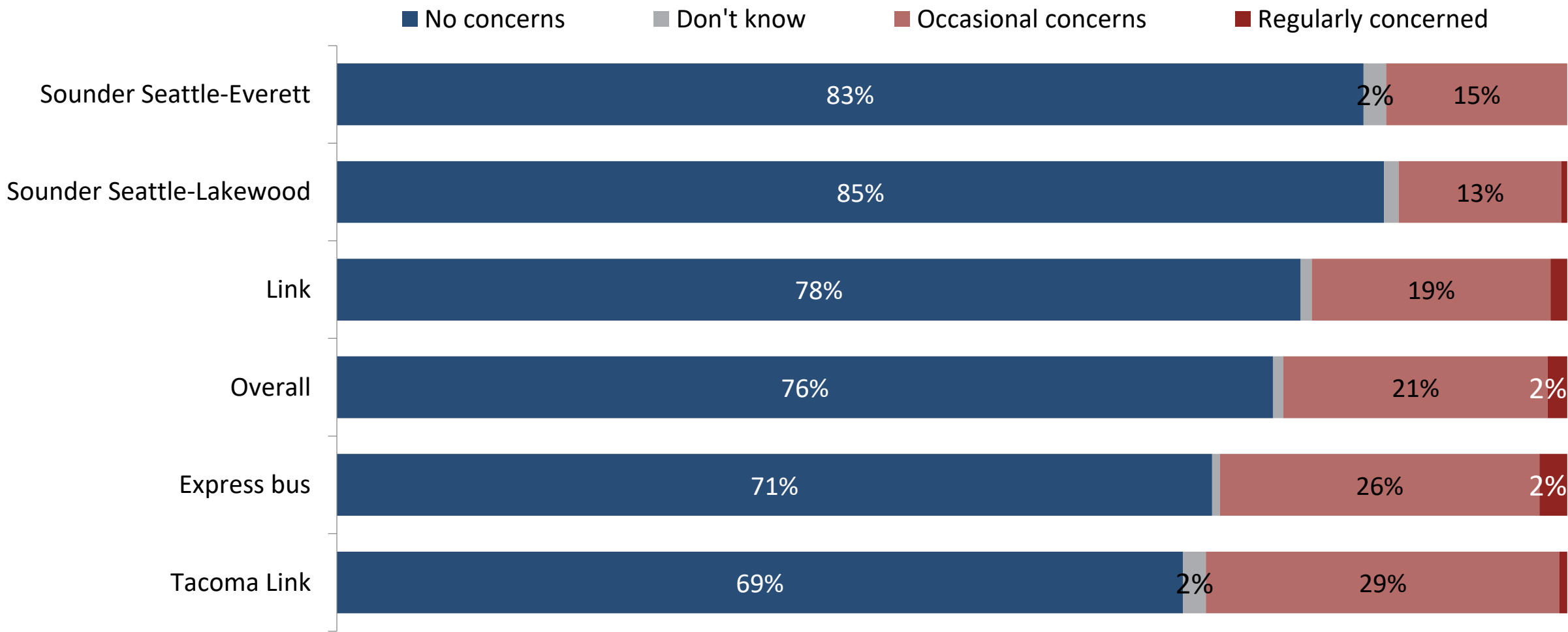
Safety at Stop/Station – by Subgroups

Women, riders under 30, and riders in Snohomish and East King are most likely to have stop or station concerns. Two-fifths or more of these rider groups have at least occasional concerns while waiting for the bus or train. There is no significant difference by income or between white and POC.



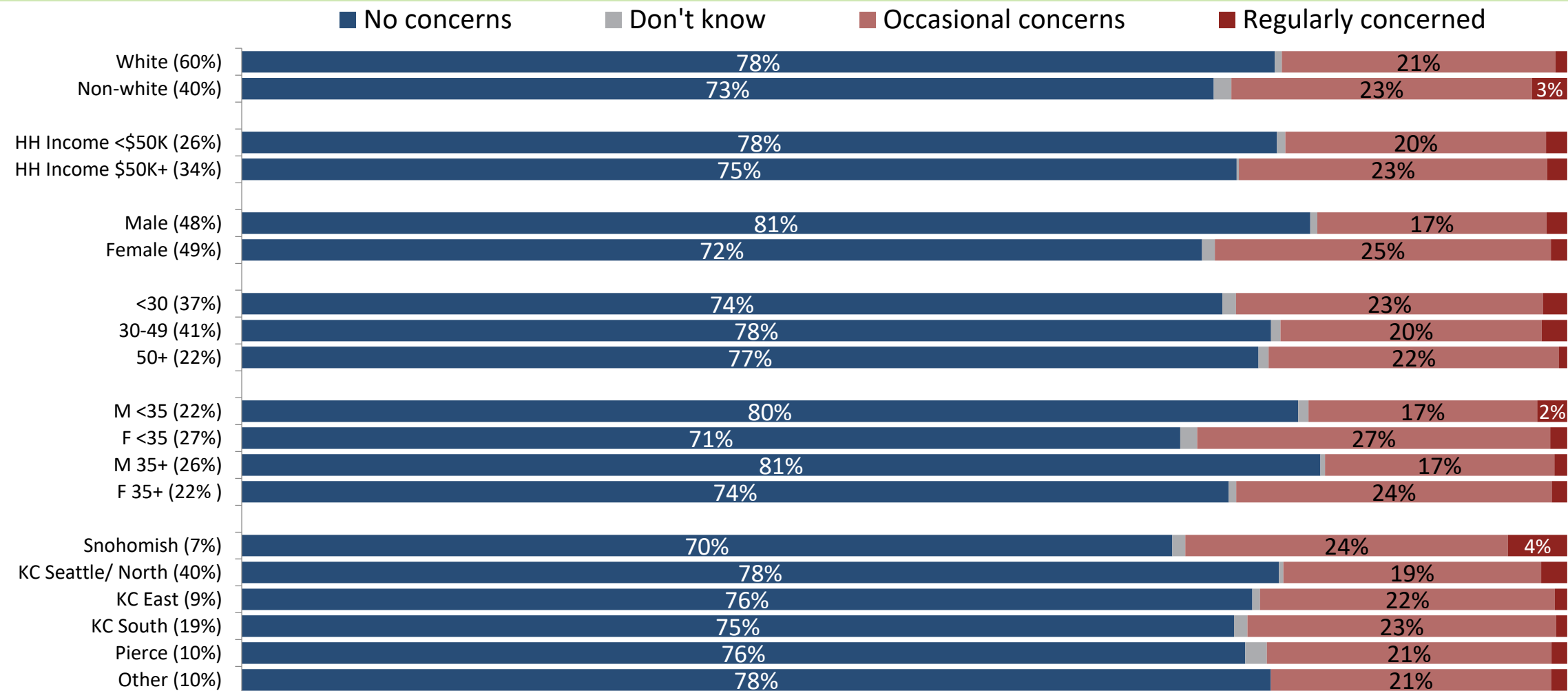
Safety On-Board – by Service

A strong majority of riders across all of ST's services have no safety concerns while on board but more than a quarter of Tacoma Link and Express bus riders have concerns at least occasionally.



Safety On-Board – by Subgroups

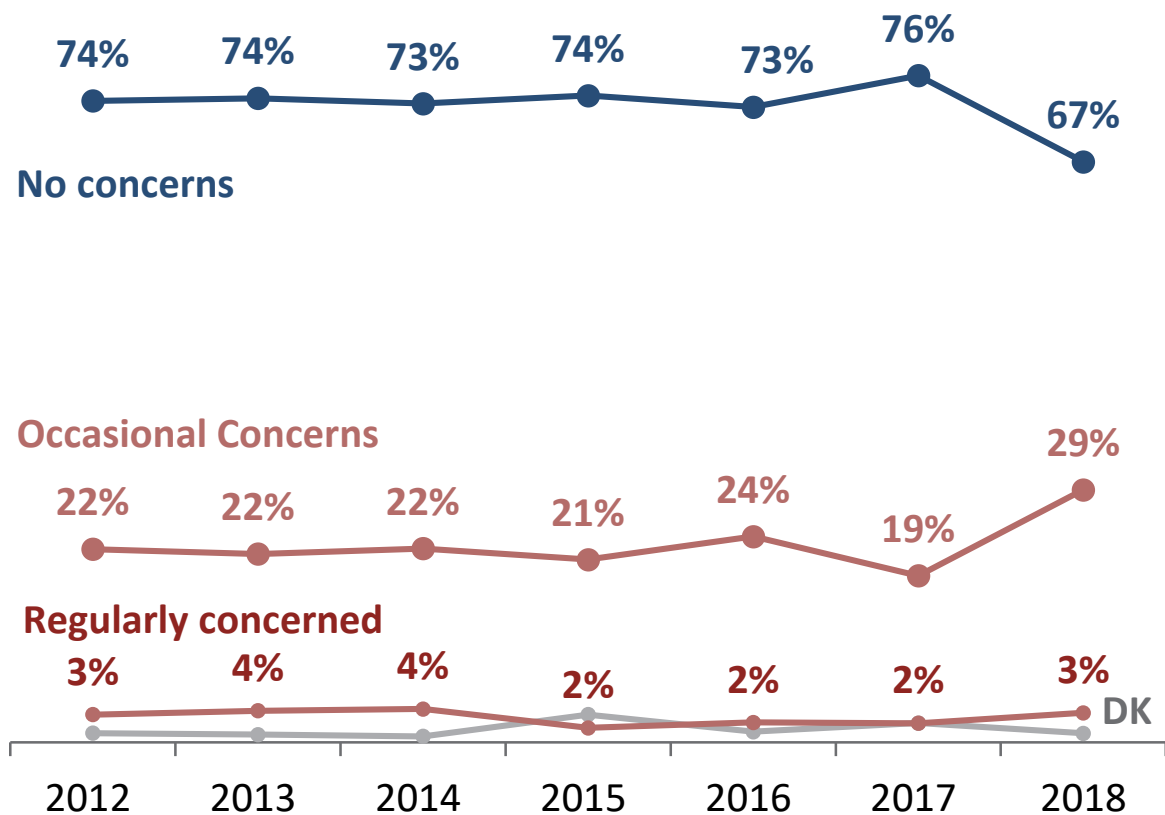
More than two-thirds of riders in every demographic subgroup have no concerns for their safety on-board. Concerns are highest among women – particularly women under 35 – and Snohomish County riders. About a quarter of these groups at least have occasional concerns.



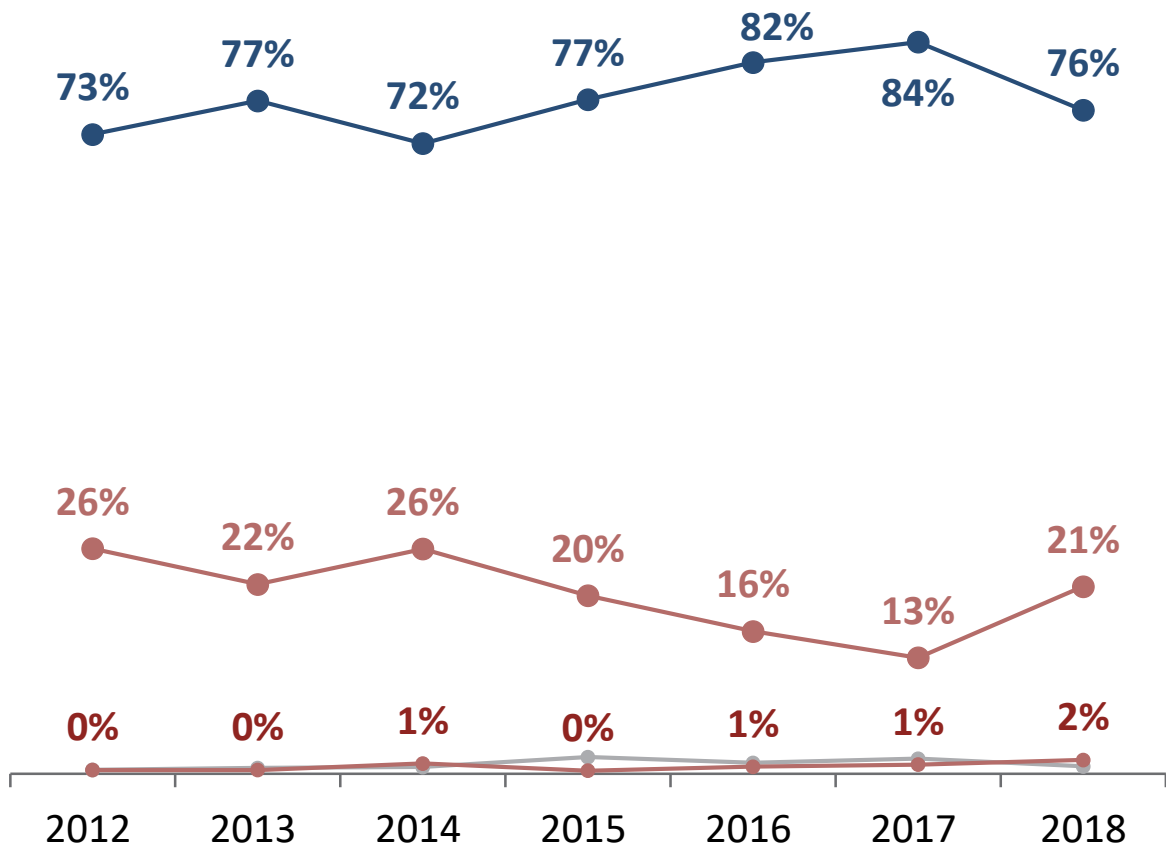
Safety at Stop/On board – Overall Riders, Year-to-Year

On-board and stop/station safety ratings have remained consistent until last year but slightly more riders report having occasional concerns in 2018.

Safety at Stop/Station



Safety On-board

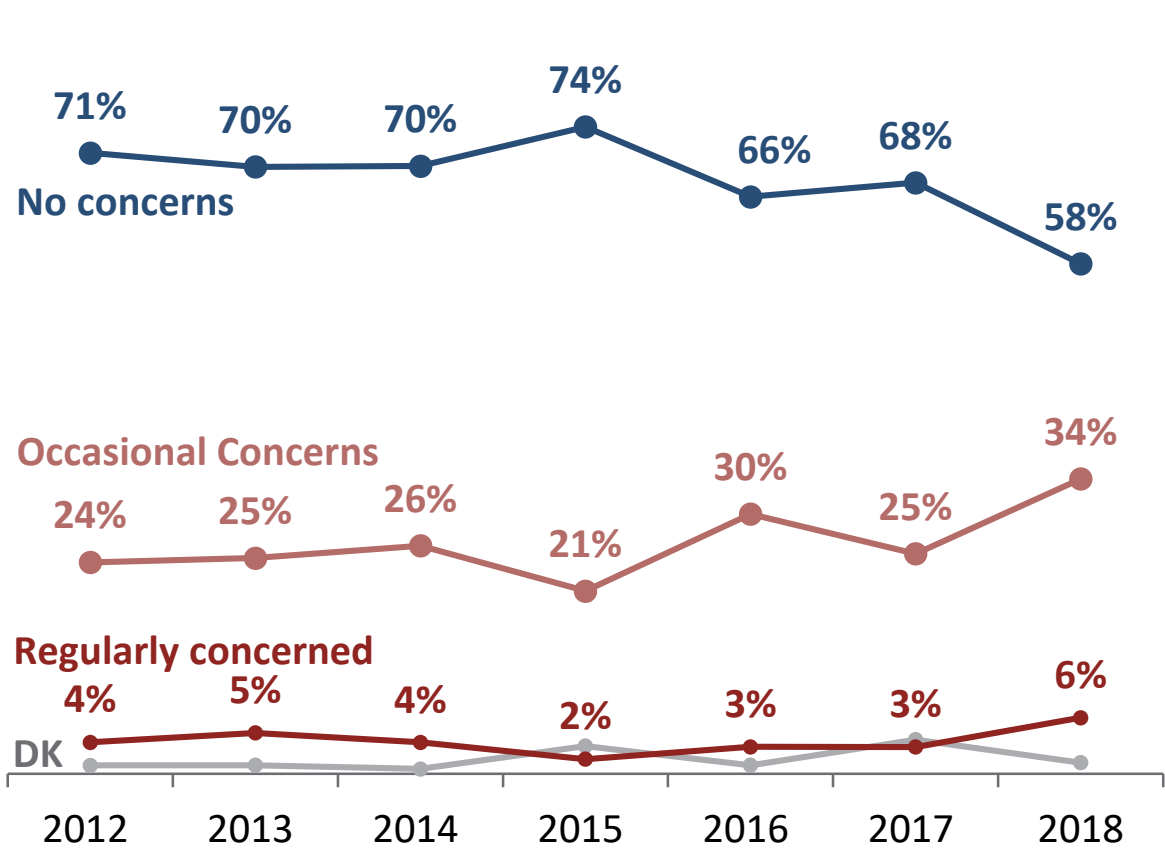


31. How would you rate your safety when waiting at a stop for this (bus/Sounder/Link)?
32. And how would you rate how safe you feel when riding this (bus/Sounder/Link)?
*Prior to 2016 wording was “And how would you rate the safety of the ride on this bus/Sounder/Light Rail? Is it...?” Very safe, Mostly safe, Unsafe/ Don't know

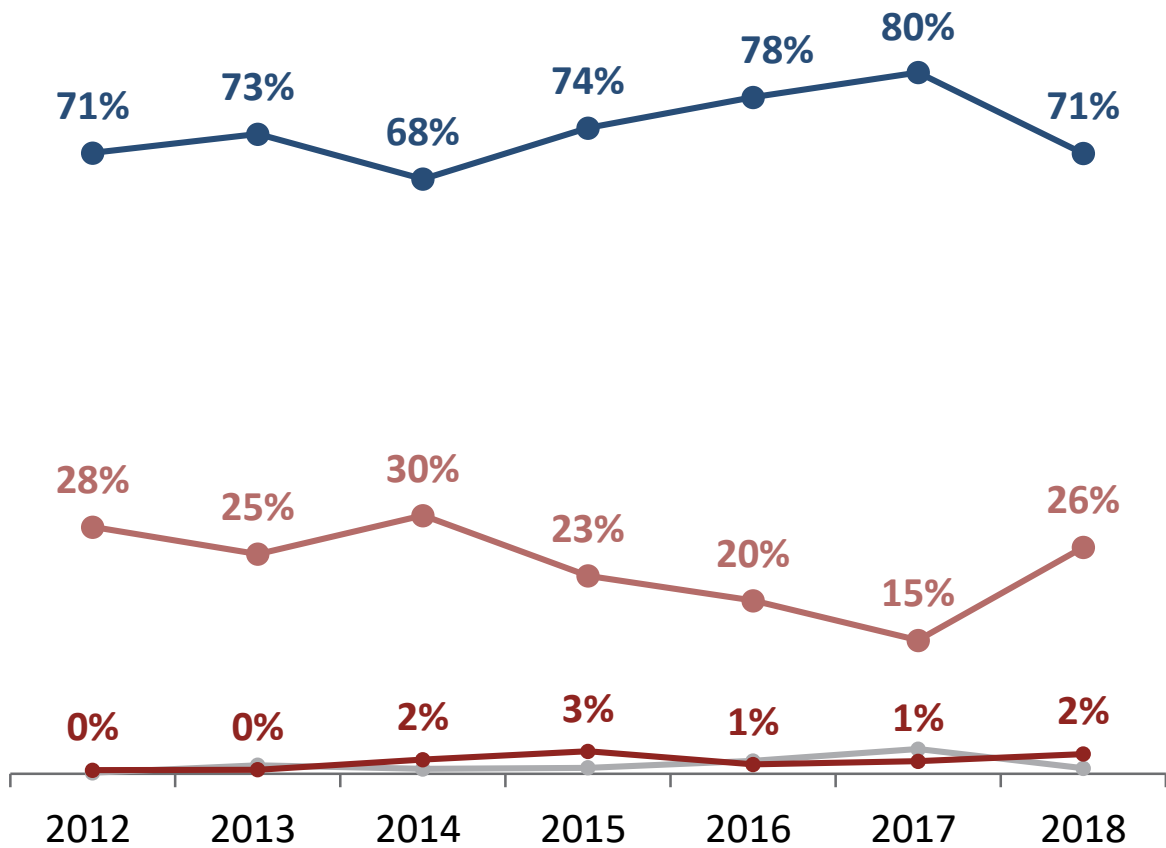
Safety at Stop/On board – Express Bus Riders, Year-to-Year

Although on-board and stop/station ratings remain high for Express bus riders, they have reported an uptick in having occasional concerns between 2017 and 2018.

Safety at Stop/Station



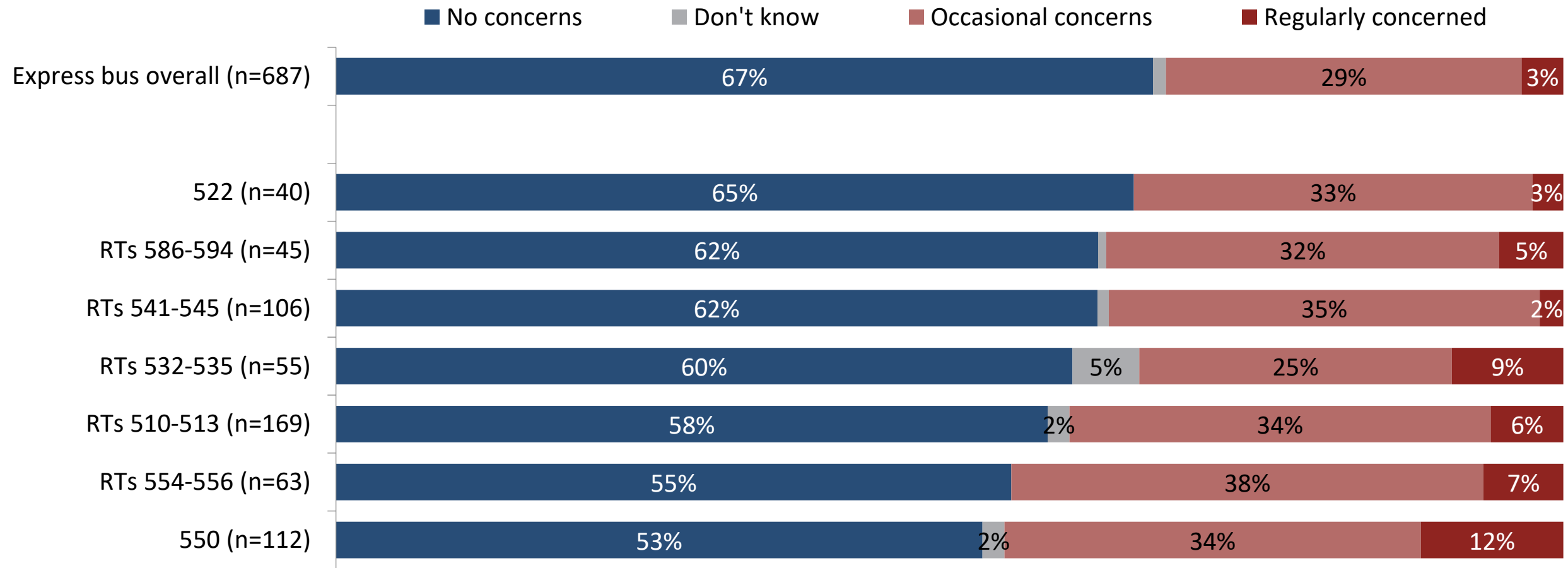
Safety On-board



31. How would you rate your safety when waiting at a stop for this (bus/Sounder/Link)?
32. And how would you rate how safe you feel when riding this (bus/Sounder/Link)?
*Prior to 2016 wording was “And how would you rate the safety of the ride on this bus/Sounder/Light Rail? Is it...?” Very safe, Mostly safe, Unsafe/ Don’t know

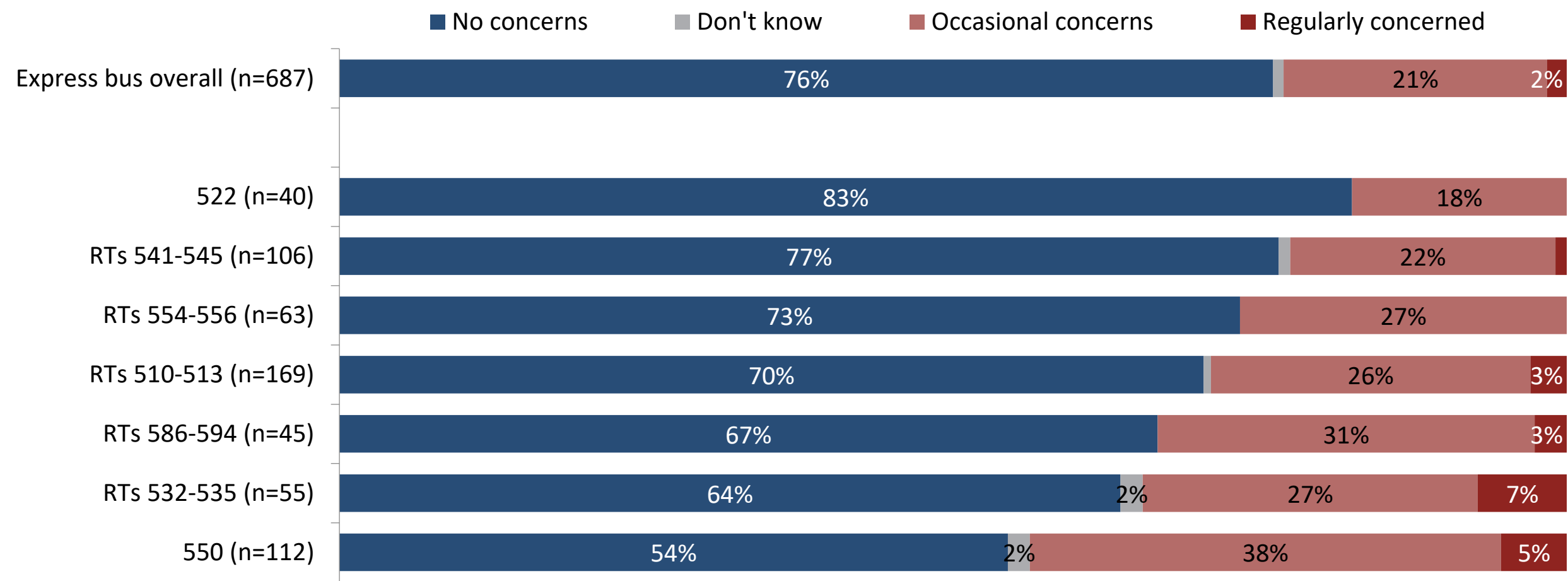
Safety Stop/Station – by Express Bus Routes

About a third of Express bus riders have at least some concerns at stops and stations. Among riders on the largest-volume routes, concerns were most frequent for some Eastside routes – including the Seattle-Bellevue and Seattle-Issaquah routes – as well as the Seattle-Everett routes.



Safety On-Board – by Express Bus Routes

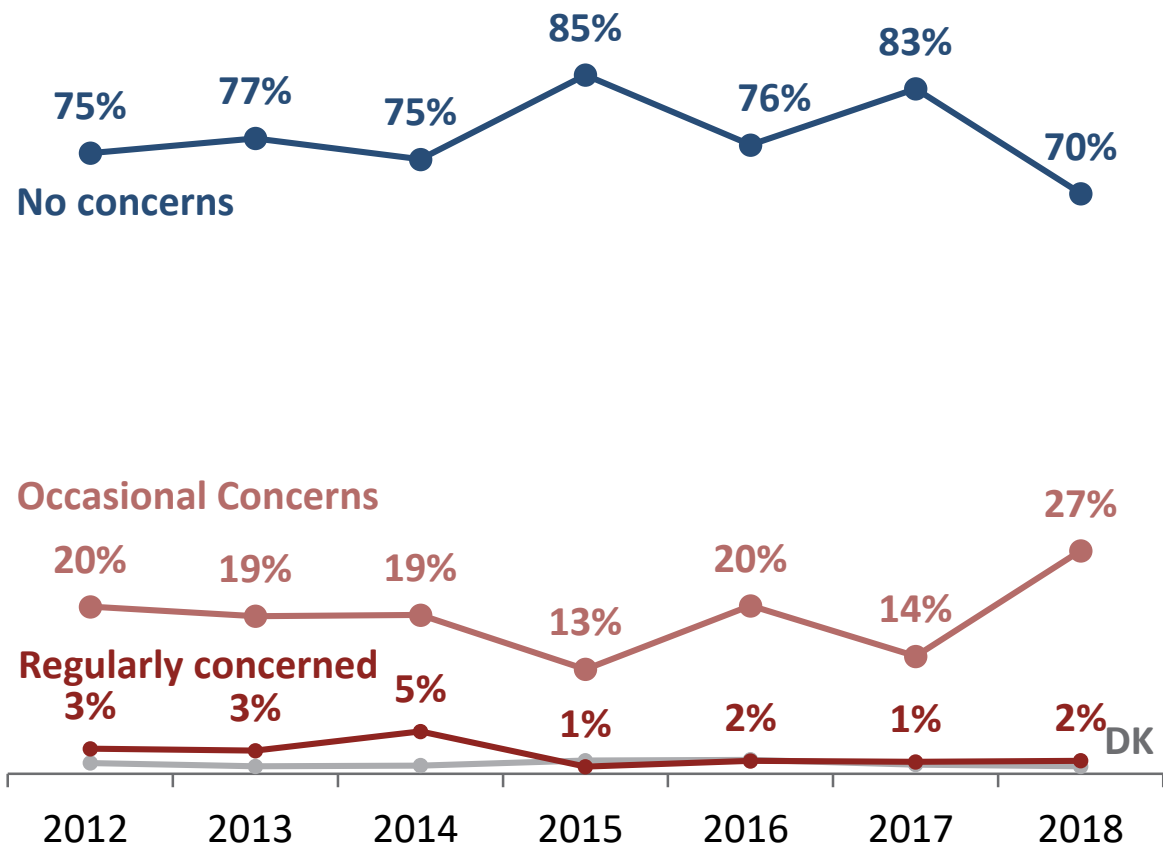
On-board safety concerns are highest among riders on the Express bus routes serving Bellevue, particularly the 550, with nearly half having at least some safety concerns.



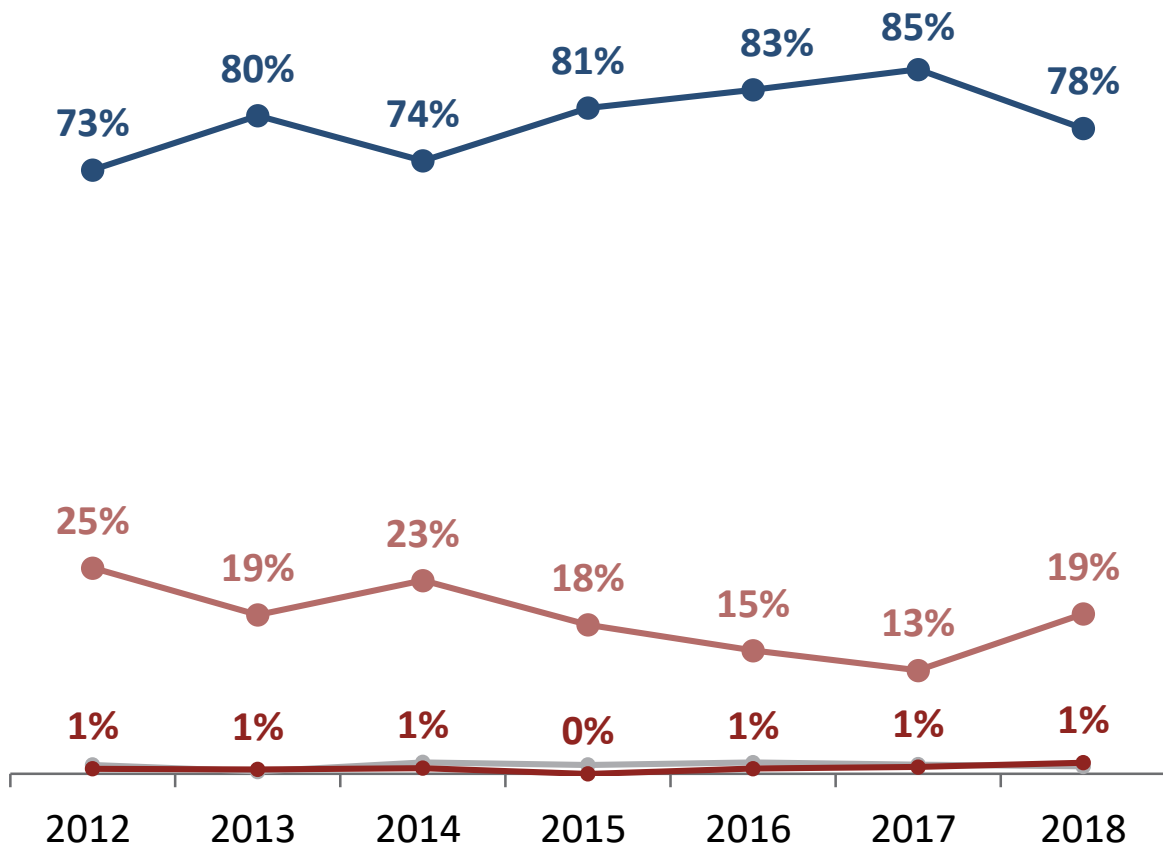
Safety at Station/On board – Link Riders, Year-to-Year

An influx of Link riders have also reported having occasional safety concerns compared to previous years, especially at stations. The share of those who are regularly concerned with their safety remains as low as previous years.

Safety at Stop/Station



Safety On-board

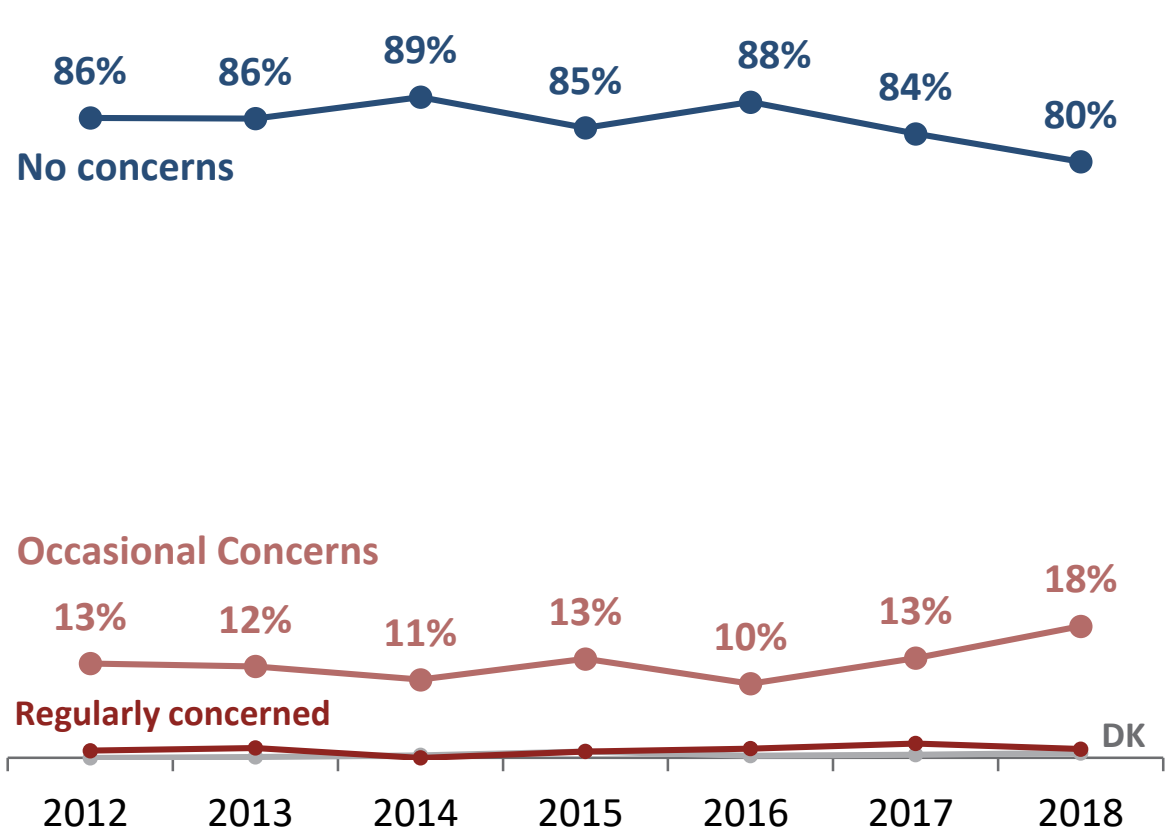


31. How would you rate your safety when waiting at a stop for this (bus/Sounder/Link)?
32. And how would you rate how safe you feel when riding this (bus/Sounder/Link)?
*Prior to 2016 wording was “And how would you rate the safety of the ride on this bus/Sounder/Light Rail? Is it...?” Very safe, Mostly safe, Unsafe/ Don’t know

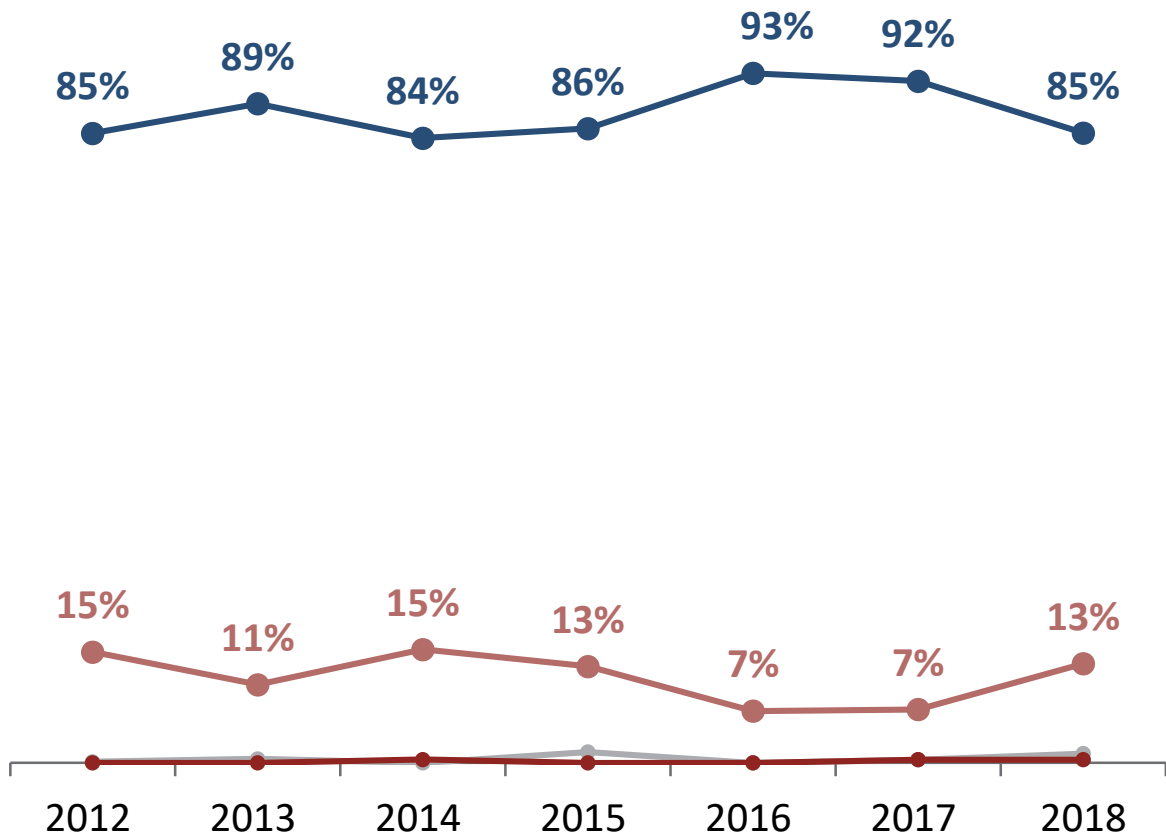
Safety at Station/On board – Sounder Riders, Year-to-Year

Safety ratings remain the highest for Sounder riders compared to other ST services. Compared to the last couple of years, slightly more Sounder riders report having occasional concerns in 2018.

Safety at Stop/Station



Safety On-board



31. How would you rate your safety when waiting at a stop for this (bus/Sounder/Link)?
32. And how would you rate how safe you feel when riding this (bus/Sounder/Link)?
*Prior to 2016 wording was “And how would you rate the safety of the ride on this bus/Sounder/Light Rail? Is it...?” Very safe, Mostly safe, Unsafe/ Don’t know

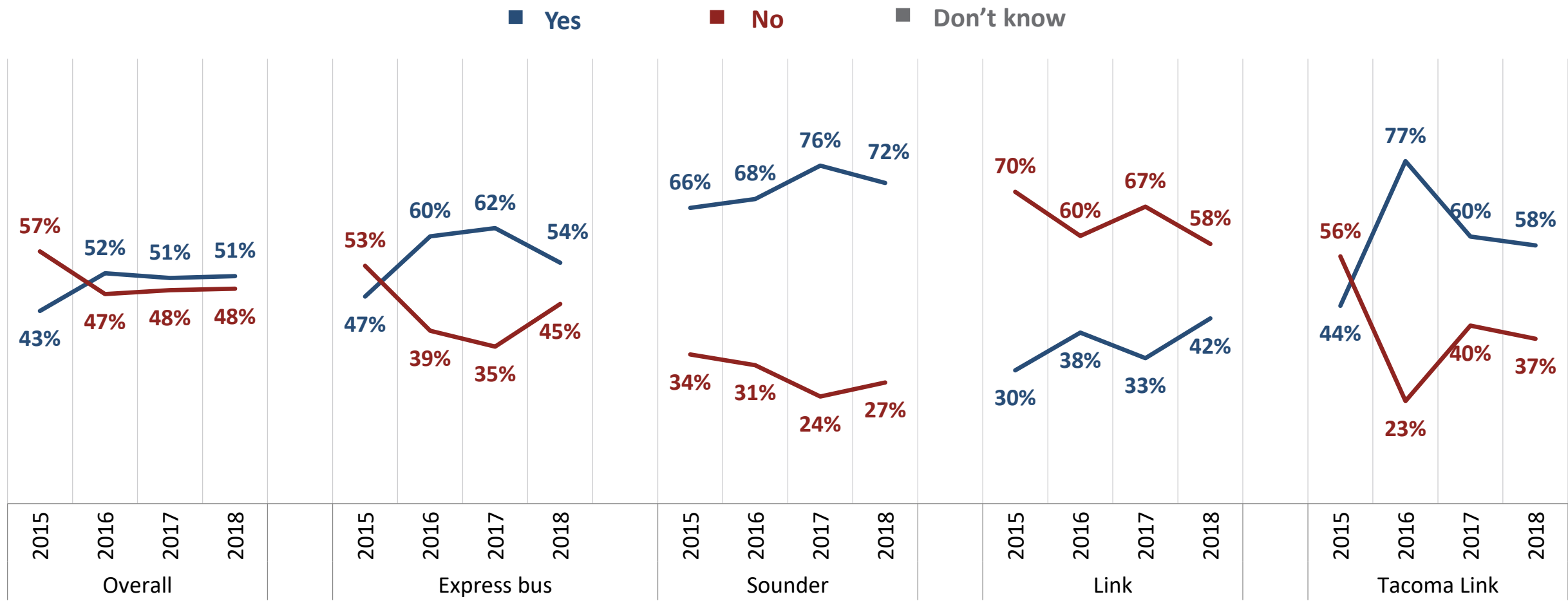
Top-of-Mind Safety Issues

The behavior of other passengers – particularly using drugs or exhibiting odd/threatening behavior -- drive safety concerns for Express bus, Link, and Tacoma Link riders. Overcrowded buses/trains is also a common concern for Tacoma Link, Southline Sounder, and Express bus riders.

Top Reasons	Overall	Express bus (n=687)	Sounder Seattle-Everett (n=163)	Sounder Seattle- Lakewood (n=423)	Tacoma Link (n=160)	Central Link (n=443)
People who are drunk/high	24	28	14	12	23	31
Weird/threatening/scary passengers	23	29	14	13	19	42
Overcrowding	22	26	17	29	17	31
Angry/disruptive riders	17	19	4	7	17	24
Panhandling/begging	8	8	4	4	8	9
Lack of security staff	7	7	2	4	7	7
Abrupt stops, jerky rides	6	10	6	11	2	5
Lack of lighting	3	5	4	2	1	1
Unsafe parking lots/garages	3	3	3	5	2	2
Inexperienced or unsafe drivers	2	2	1	2	1	1
No complaints/suggestions	38	27	52	43	46	26
Other	2	3	2	2	2	1
(Don't Know)	2	2	3	3	2	3
(Refused)	<1	<1	1	<1	<1	1

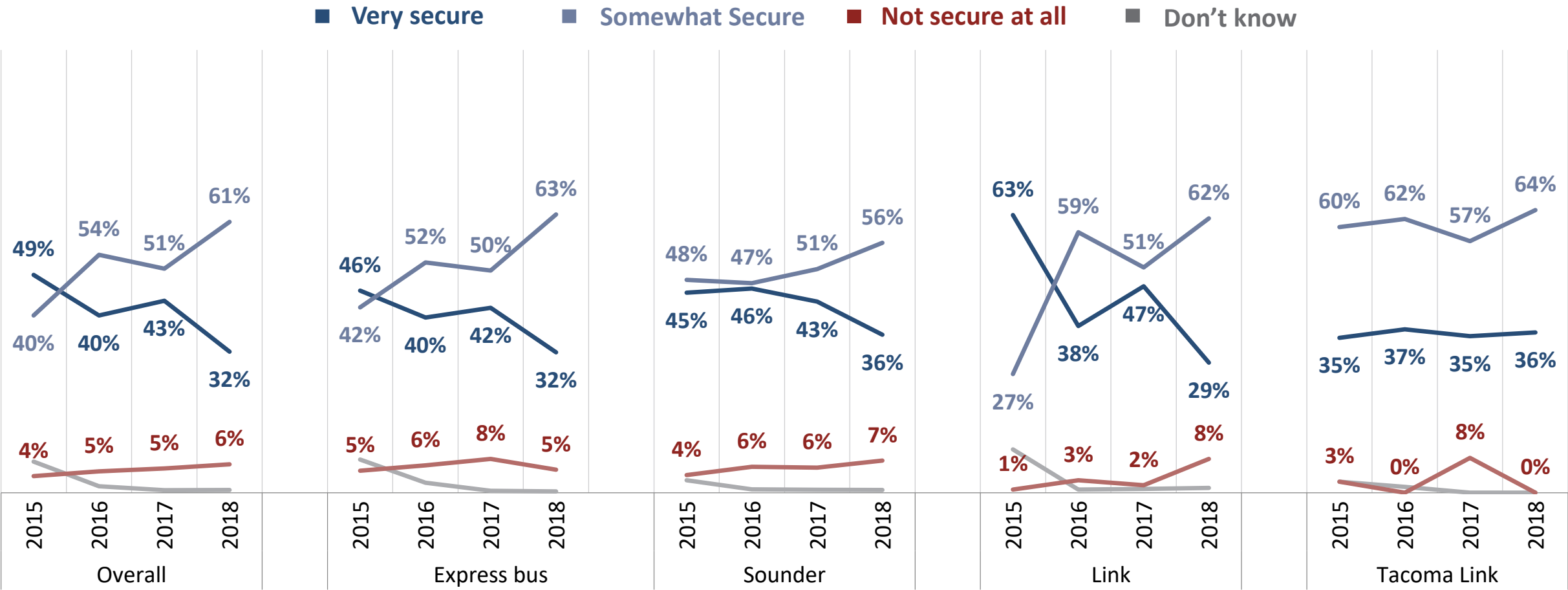
Park & Ride Usage

A majority of Express bus, Sounder, and Tacoma Link riders continue to use park & rides.



Security of Parked Vehicle

Fewer riders say they feel their parked vehicles are very secure at Park & Rides compared to last year.



35. (Only asked if Yes in Q29) How secure do you feel your vehicle is when parked at a park and ride? Would you say very secure, somewhat secure, or not secure at all? (n=711)

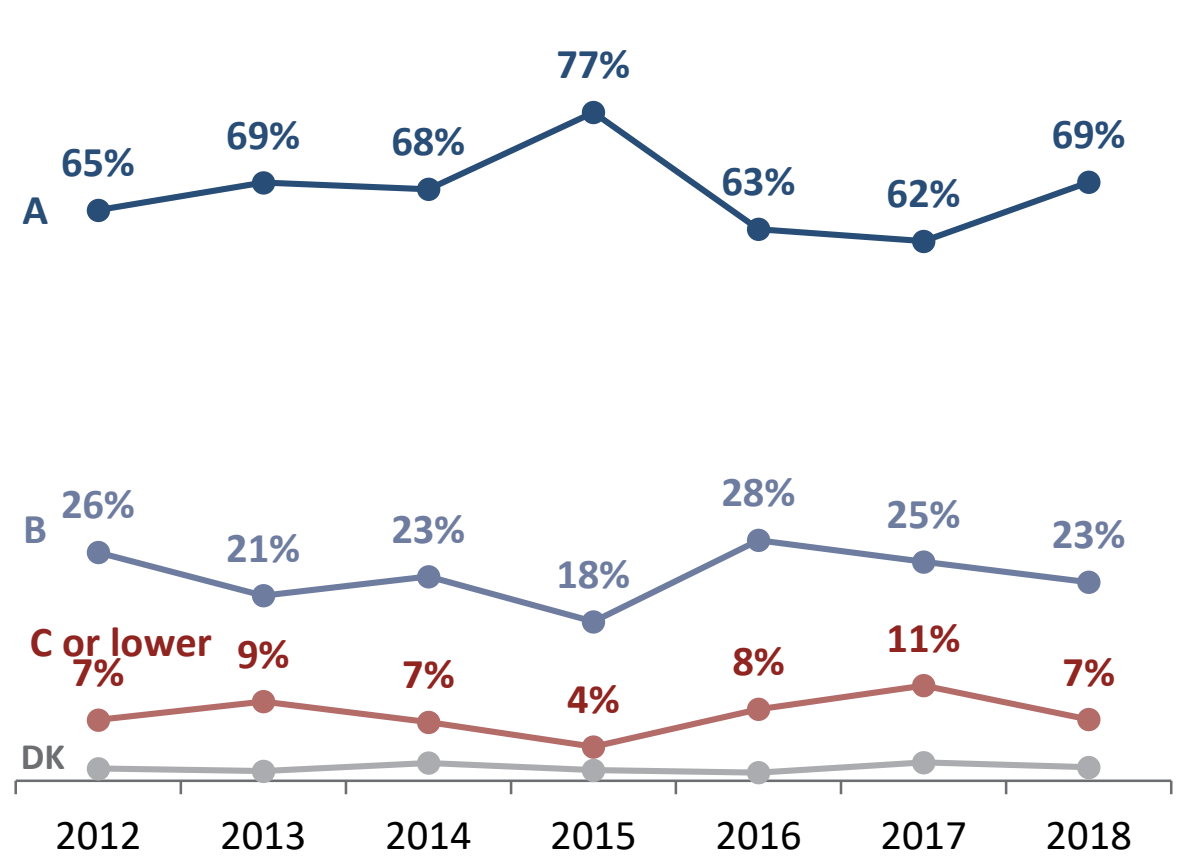


Performance Attribute Ratings and Grades: Personnel Ratings

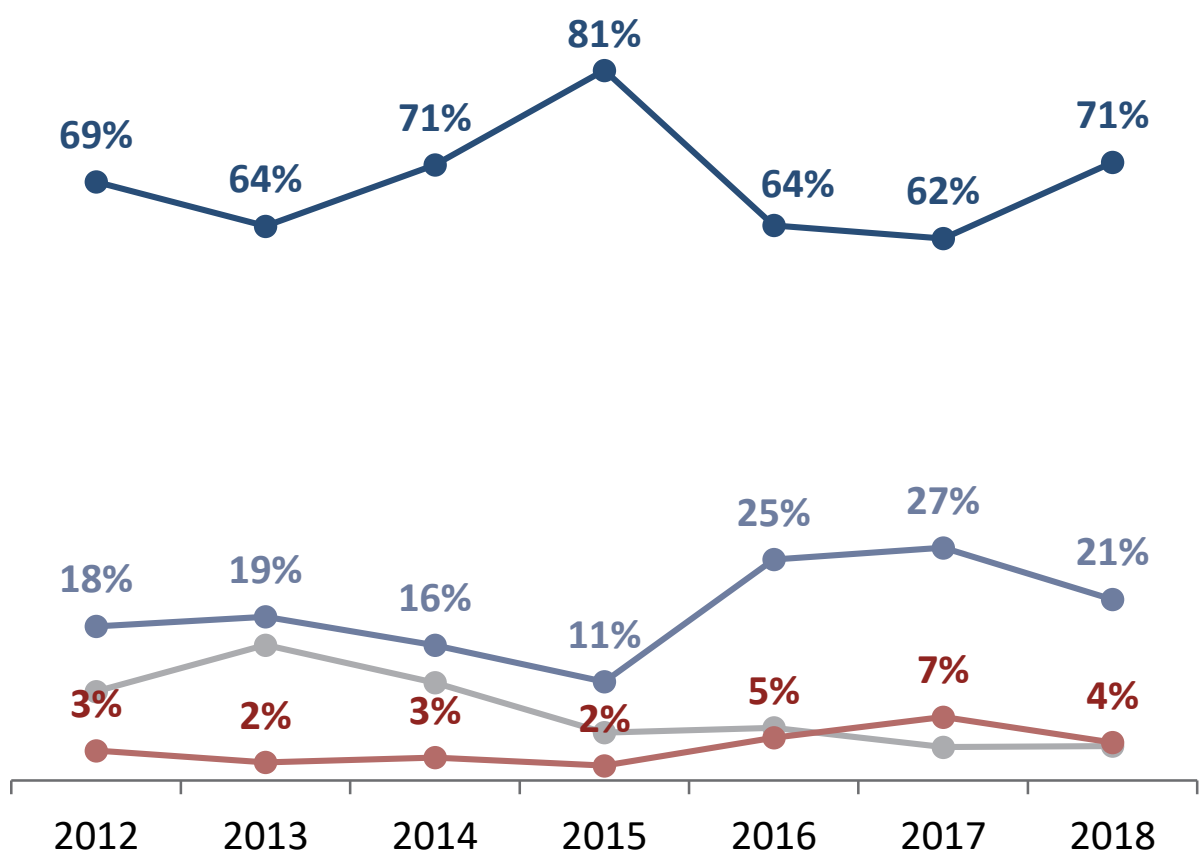
Express Bus Operator Ratings, Year-to-Year

Apart from a ratings spike in 2015, grades for bus driver courtesy and appearance are among the highest they've been in the last few years.

The courtesy of the bus driver



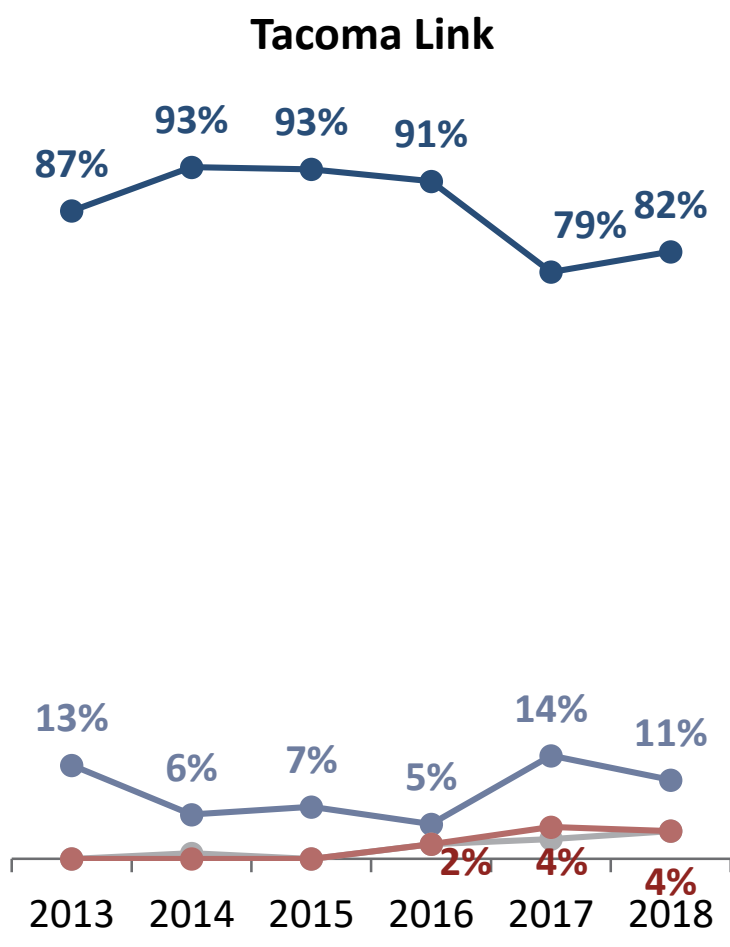
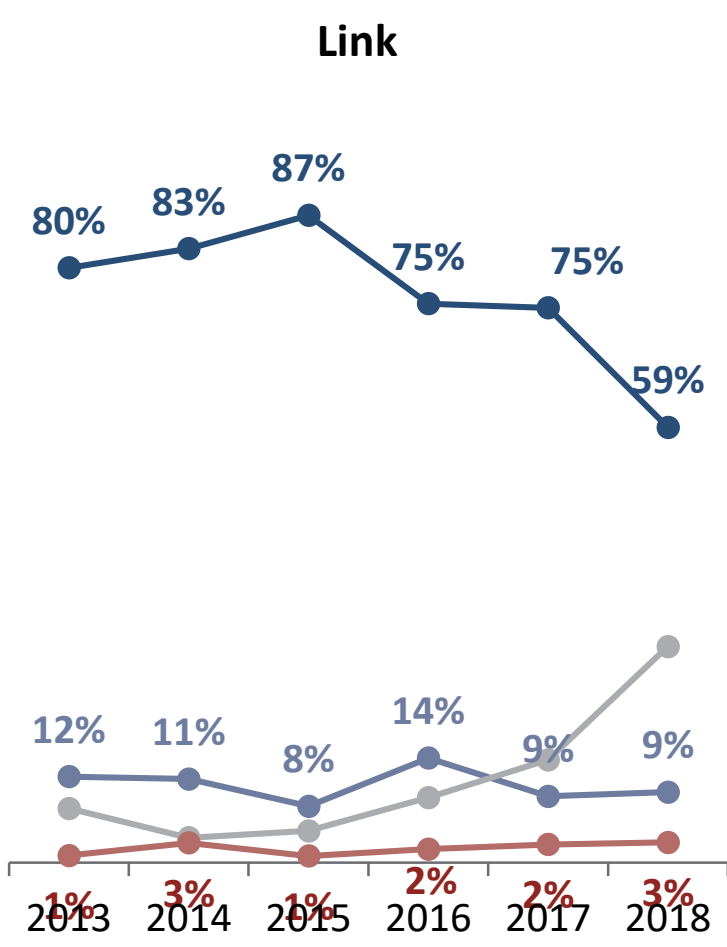
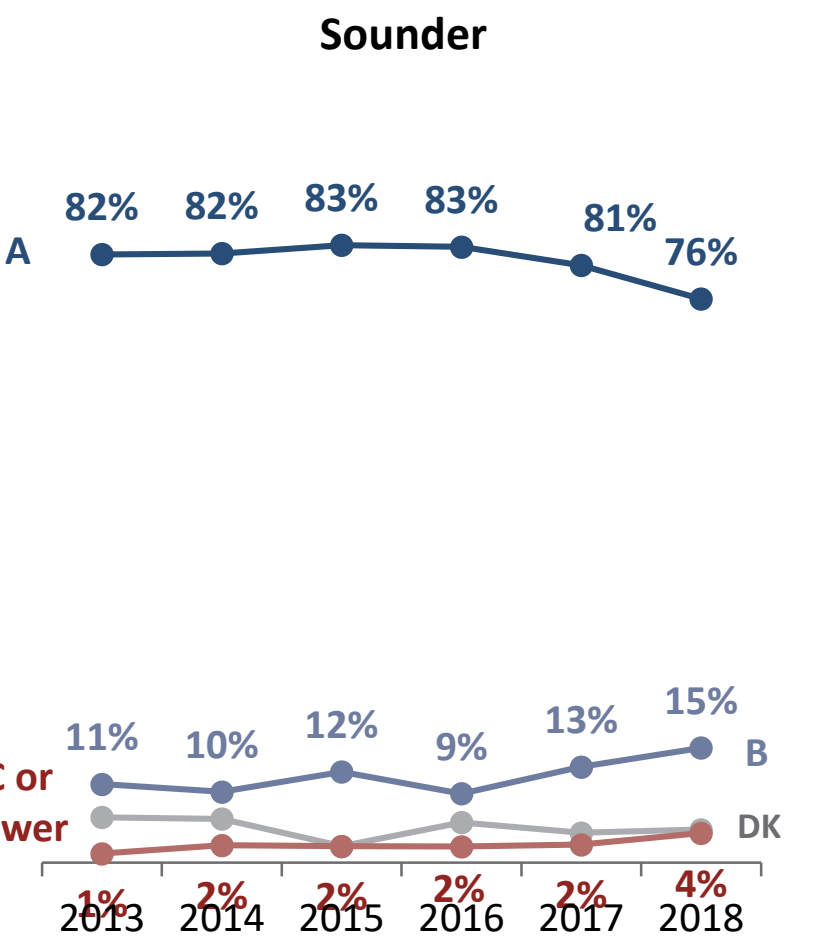
The appearance of the bus driver



18. The courtesy of the bus driver
19. The appearance of the bus driver (n=687)

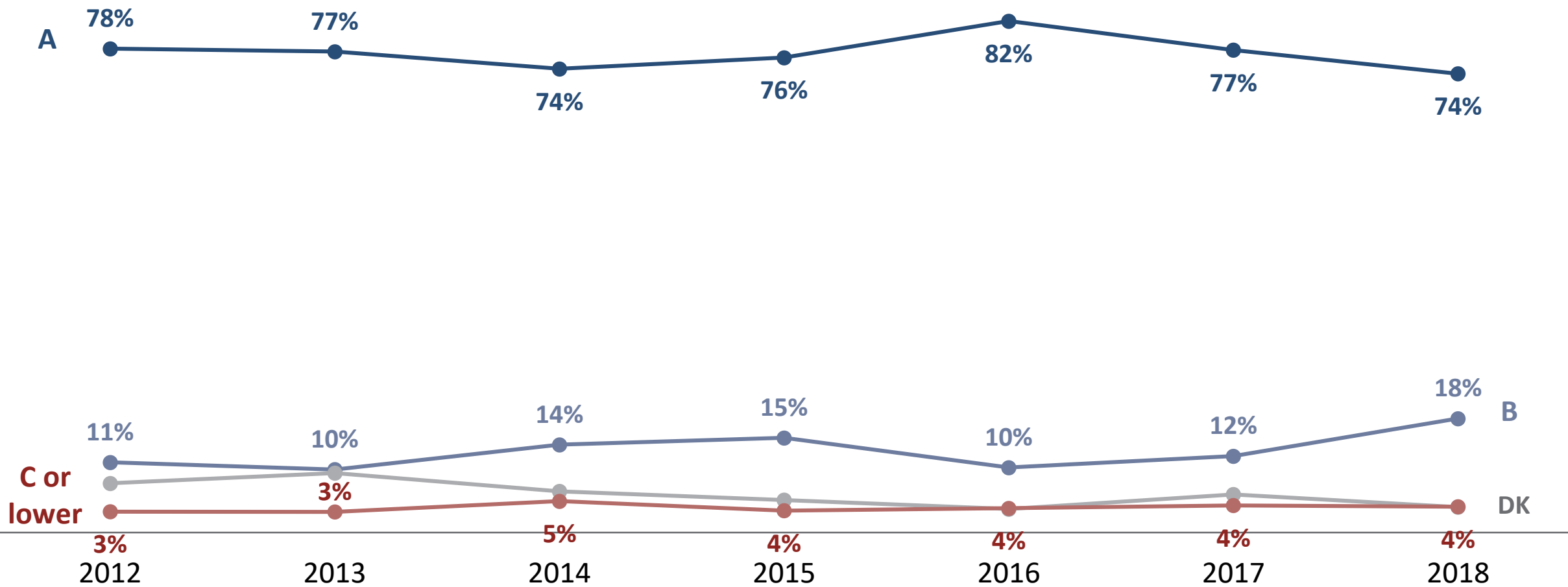
Train Conductor Rating, Year-to-Year

Positive conductor ratings have declined slightly for Sounder and Tacoma Link riders than previous years but they are significantly lower for Link. A higher share of riders were unable to rate the Link conductor in 2018.



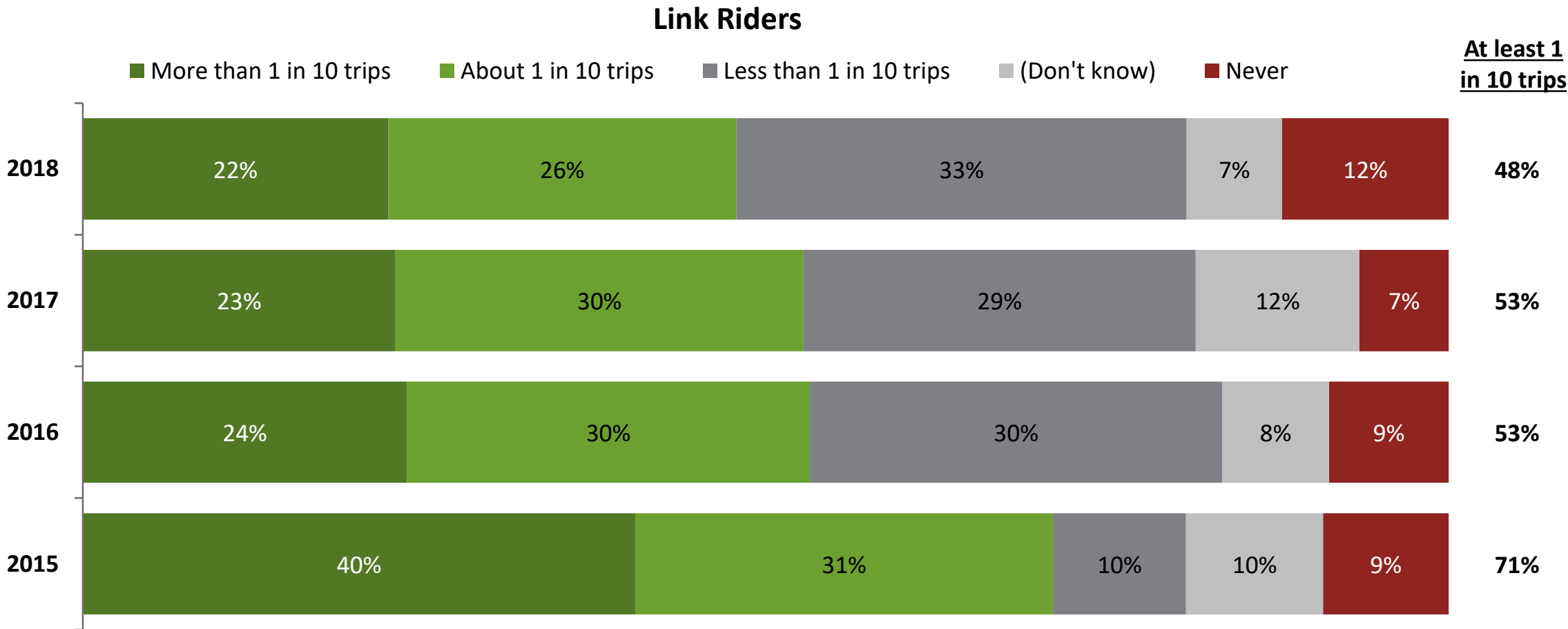
Sounder Station Agents Rating, Year-to-Year

Sounder station agent ratings have remained highly consistent since 2012.



Light Rail Fare Inspectors

The share of Link riders who report seeing a fare inspector is comparable to the last couple of years but remains significantly lower than in 2015.



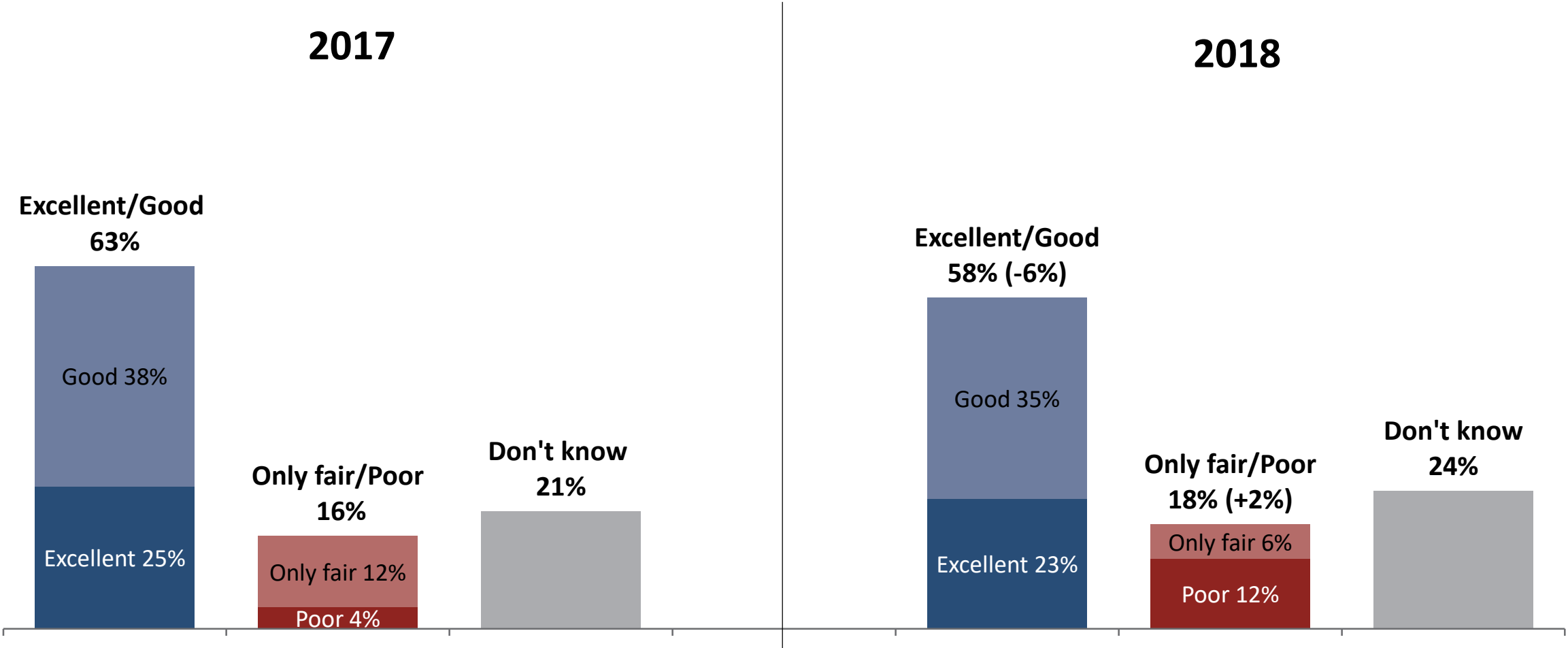
30. How often do you see a fare inspector while riding light rail? Is it more than one out of every 10 trips, about once out of every ten trips, less than once out of every trips, or do you never see a fare inspector while riding light rail? (n=443)



**Performance Attribute
Ratings and Grades:
Organizational Ratings**

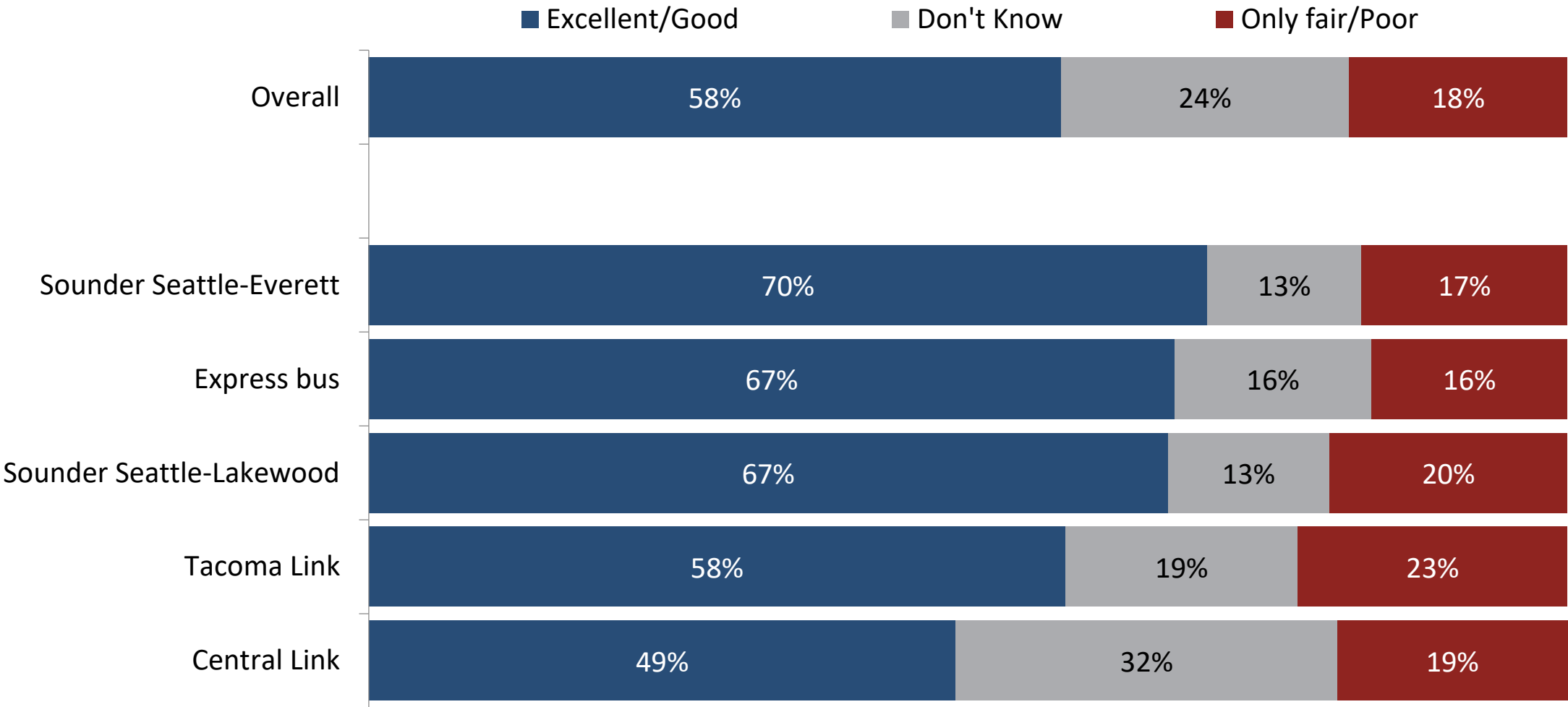
Value of Service

Compared to 2017, slightly fewer riders consider Sound Transit a good or excellent value for the tax money collected and the share of those who rate the value as poor has increased to about one-in-ten.



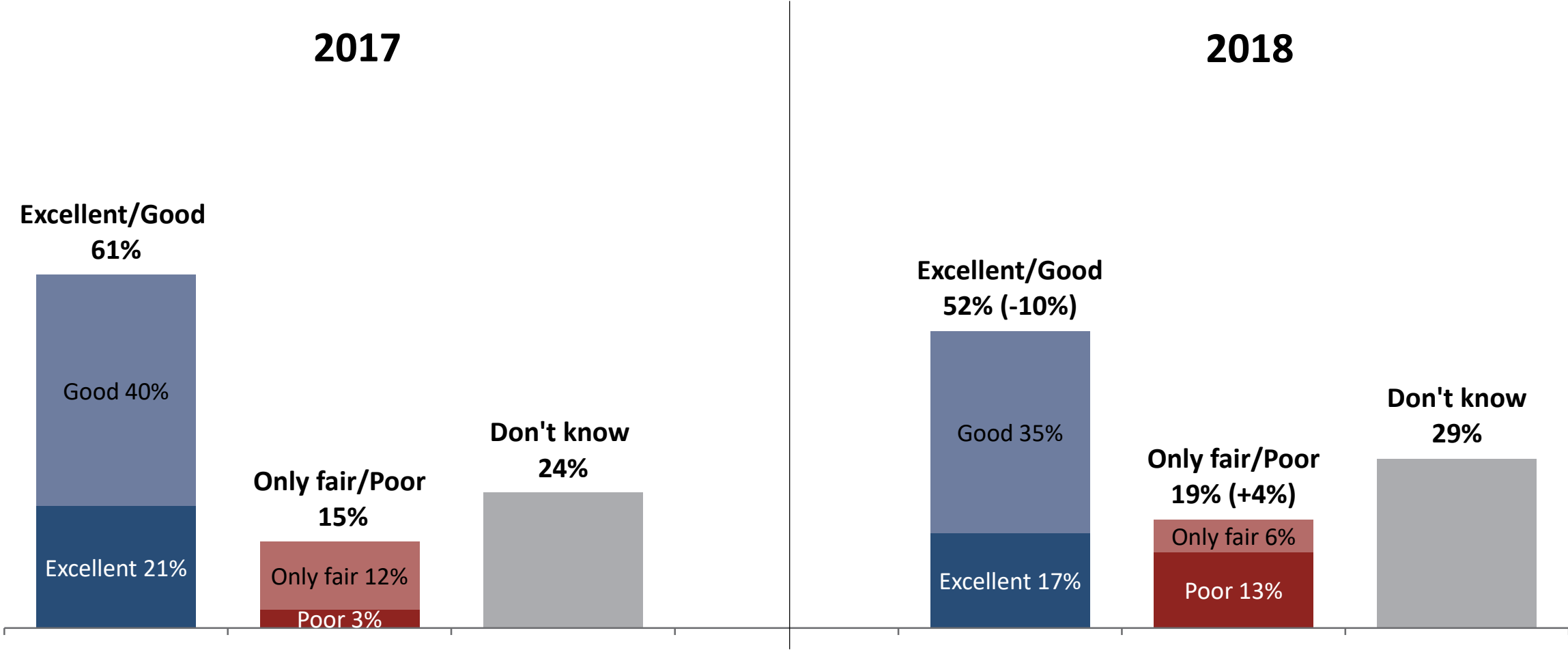
Value of Service Rating by ST Service

By service, over two-thirds of Sounder and Express bus riders consider ST a good or excellent value for the tax funding. A third of Link riders are unsure.



Managing Projects

The share of riders who believe ST does a good or excellent job managing its projects has dropped by nearly 10 points since 2017. Over one-in-ten now say the agency is doing a poor job.



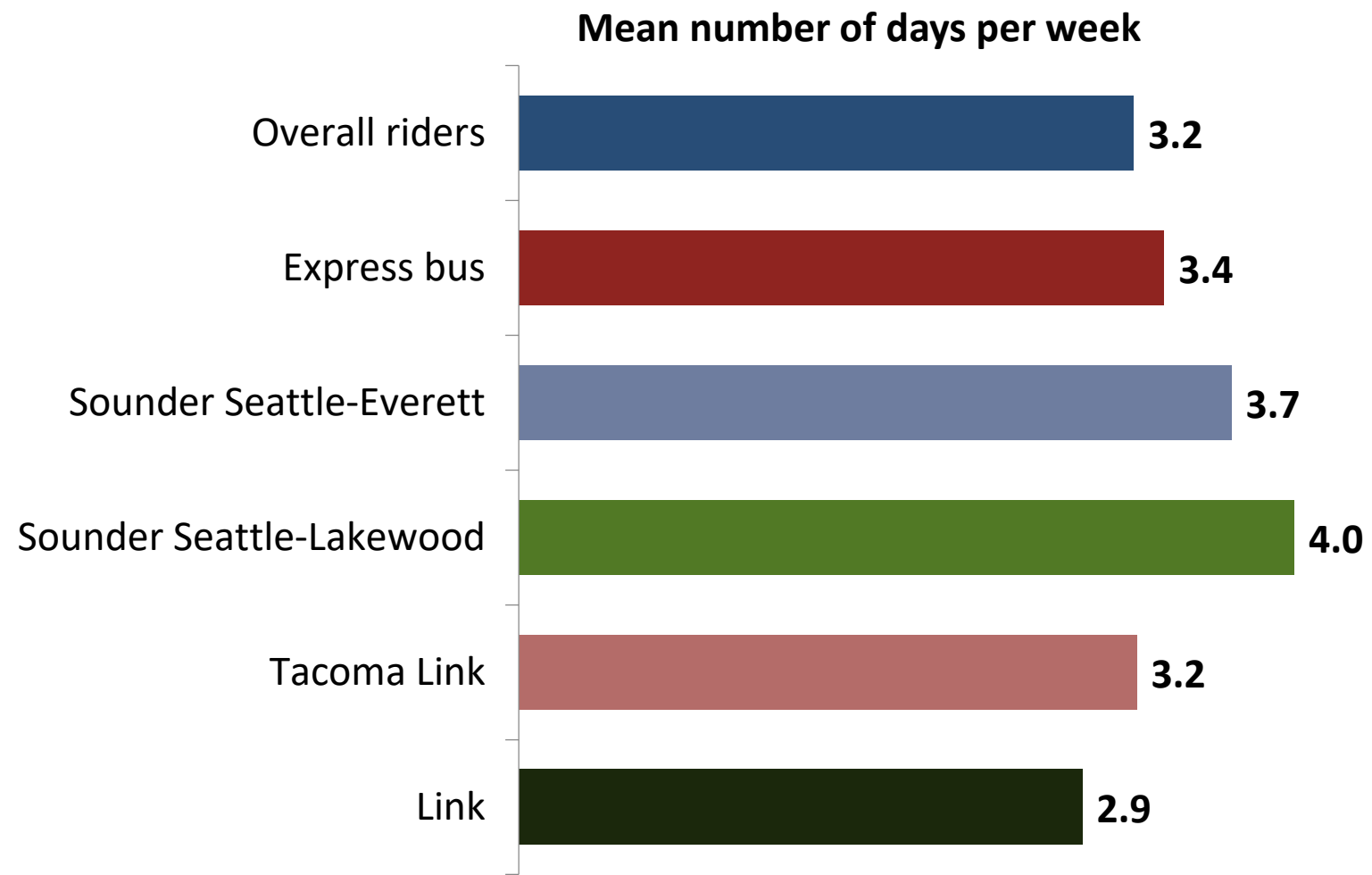
Q37. How would you rate The job Sound Transit does managing service improvement and expansion projects?



Service Usage

Frequency of Trip

Sounder riders continue to make their trips more frequently: an average of four times per week. Express bus and Link riders make their trips around three times per week, on average.

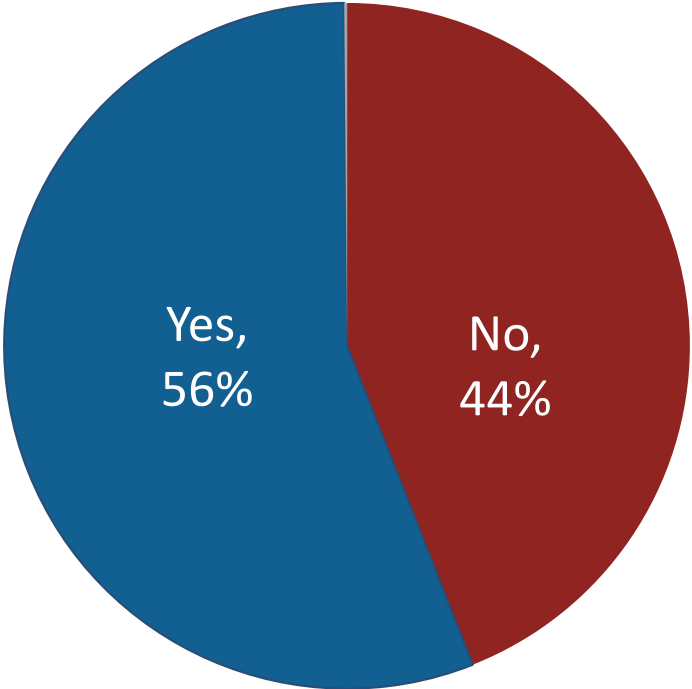


5. Most weeks, which days of the week do you typically make this trip? If you typically make this trip less than once a week, please just say so.

Car Ownership & Choice Riders

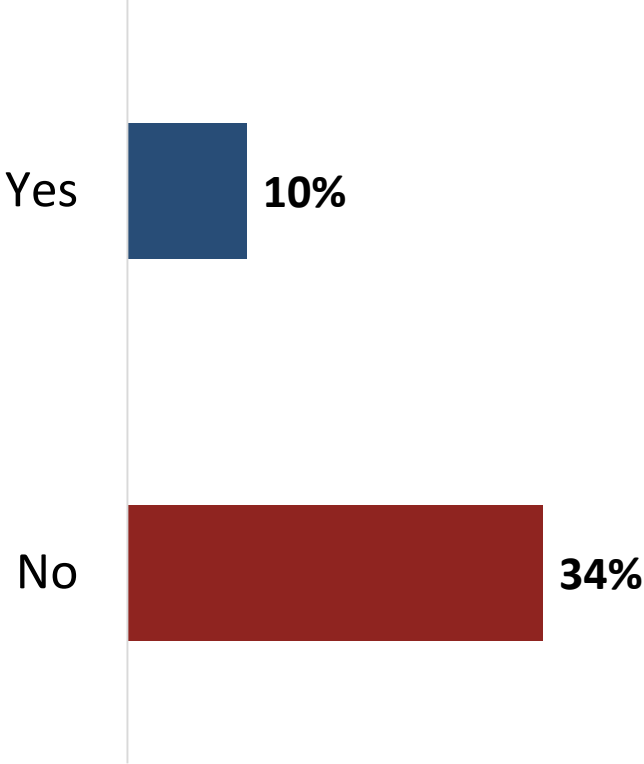
Two thirds of sounder riders are considered “Choice” riders, including more than half who have a car available for the trip and one-in-ten who do not own a car because they prefer to use transit.

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



If No (n=678)

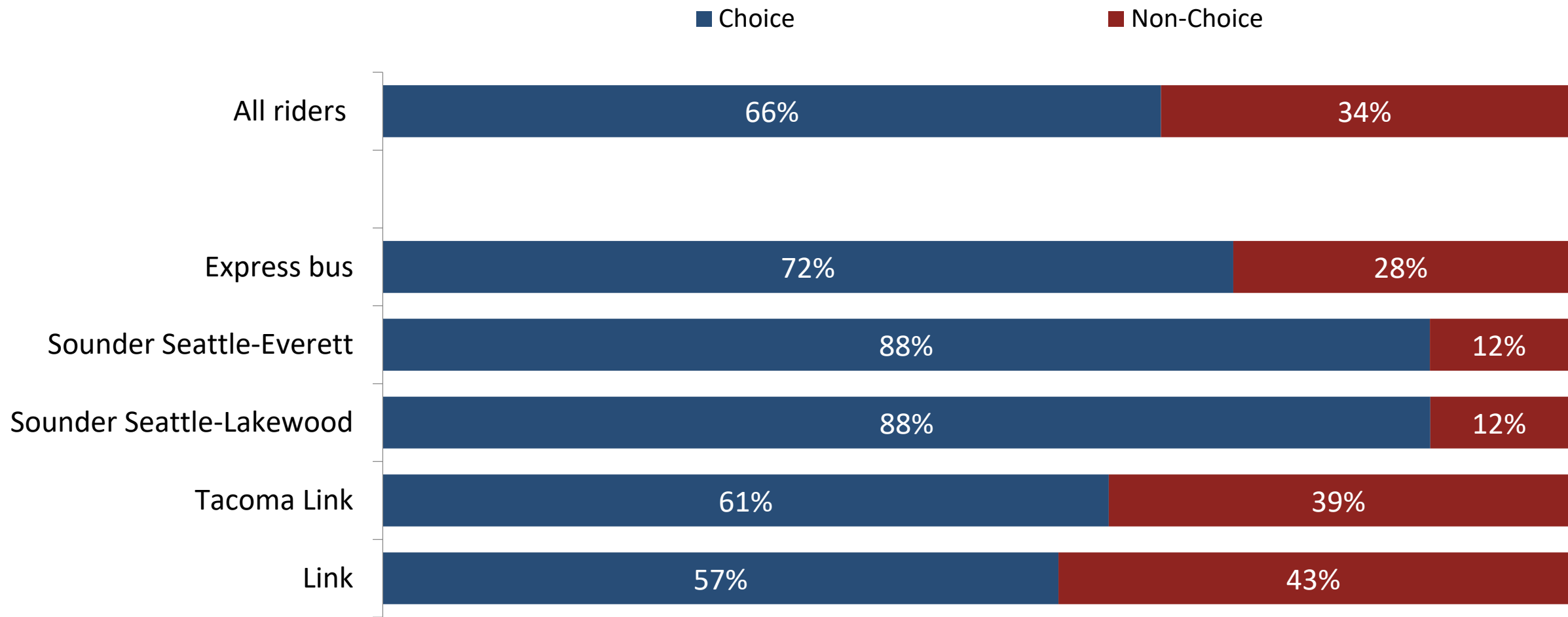
Have you sold a car or chosen not to buy a car because you prefer public transit?



Choice riders: 66%
Have vehicle available (56%) OR
Sold/Chosen not to buy (10%)

Choice Riders by Service

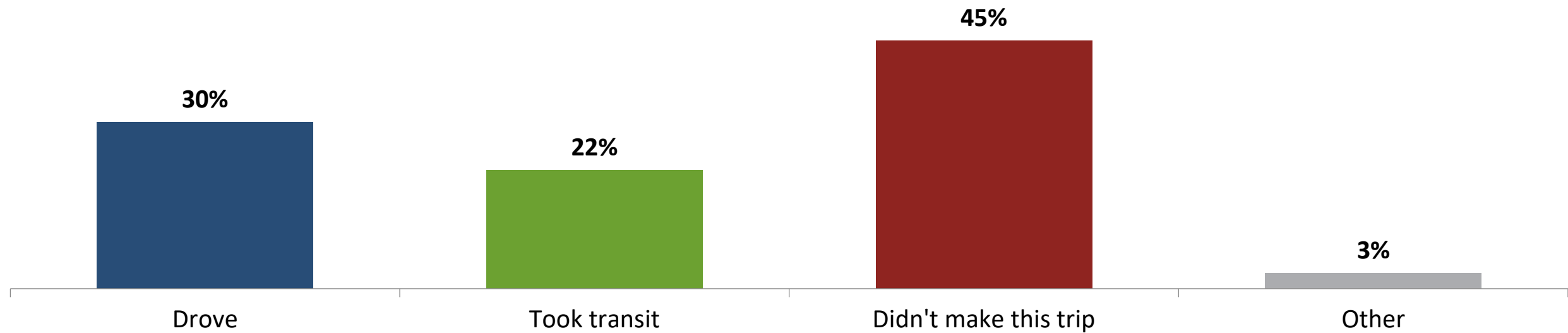
Choice ridership is highest among Sounder riders whereas Express bus and Link riders are more reliant on transit for their weekly trips.



*Choice Rider: Have/had car available in Q6/7

Previous Modes of Travel

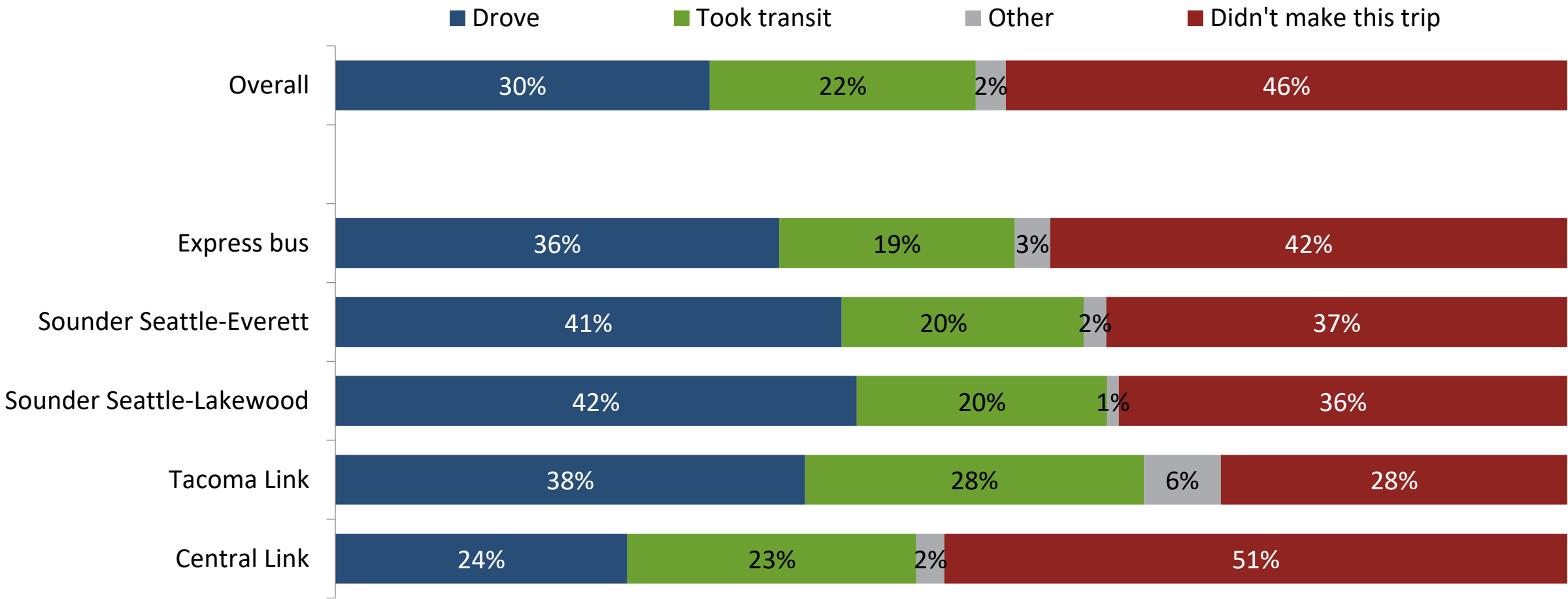
Before using Sound Transit services, nearly half of current riders didn't make their current trip at all. About a third used to drive and one-in-five took another form of public transit.



12. Before you started riding this [bus/Link/Sounder], how did you usually make this trip? Did you drive or take transit?

Previous Modes of Travel – by Service

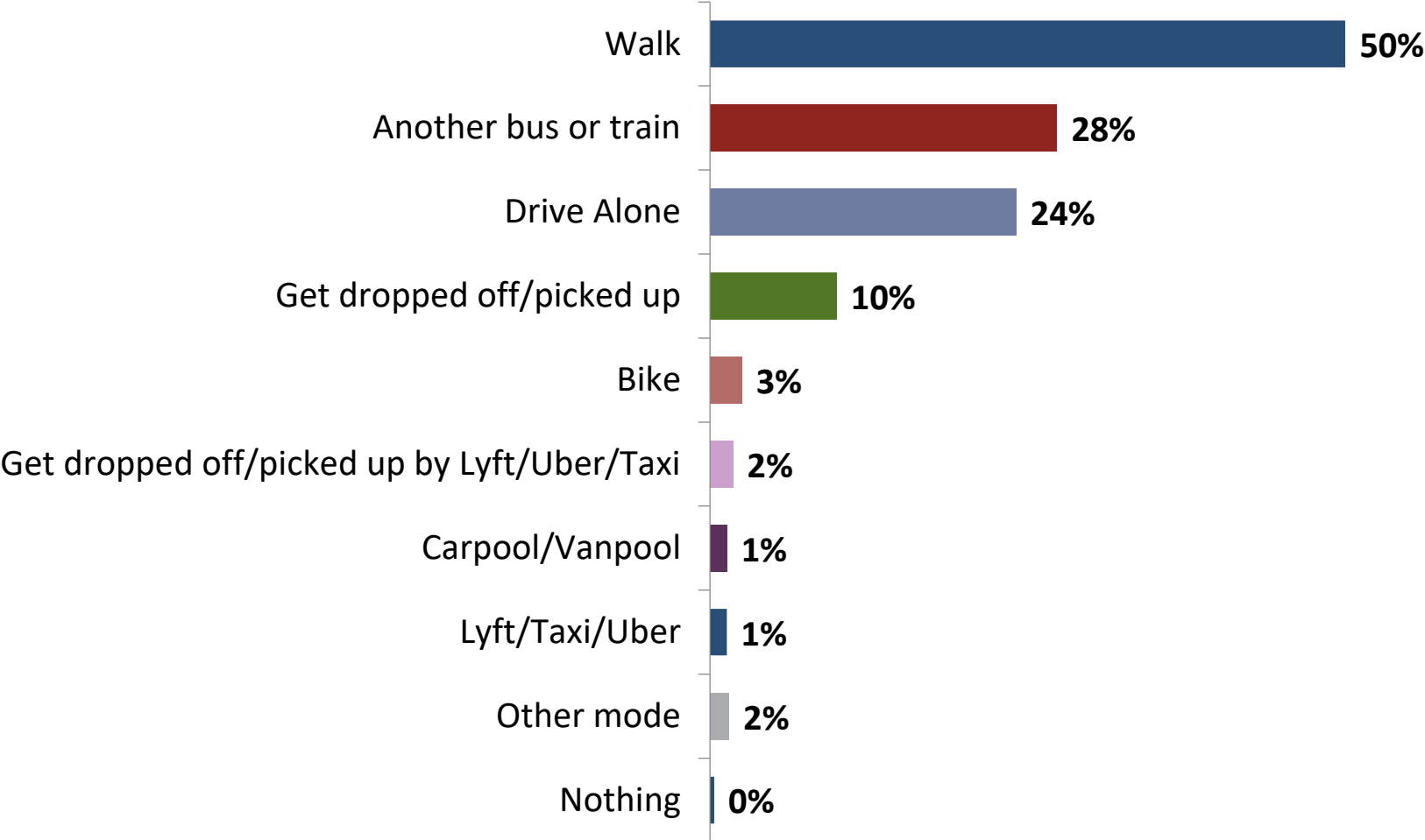
Before riding their current trip on ST, a near-majority of riders did not make the trip at all; this share is highest among Link and Express bus riders. The service replaced driving for a plurality of Sounder and Tacoma Link riders. One-in-five took another transit service before using ST.



12. Before you started riding this [bus/Link/Sounder], how did you usually make this trip? Did you drive or take transit?

Mode of Travel To the Stop/Station

About half of riders walk to the stop/station where they access Sound Transit. A quarter transfer from another bus or train and a quarter drive alone to where they board ST.

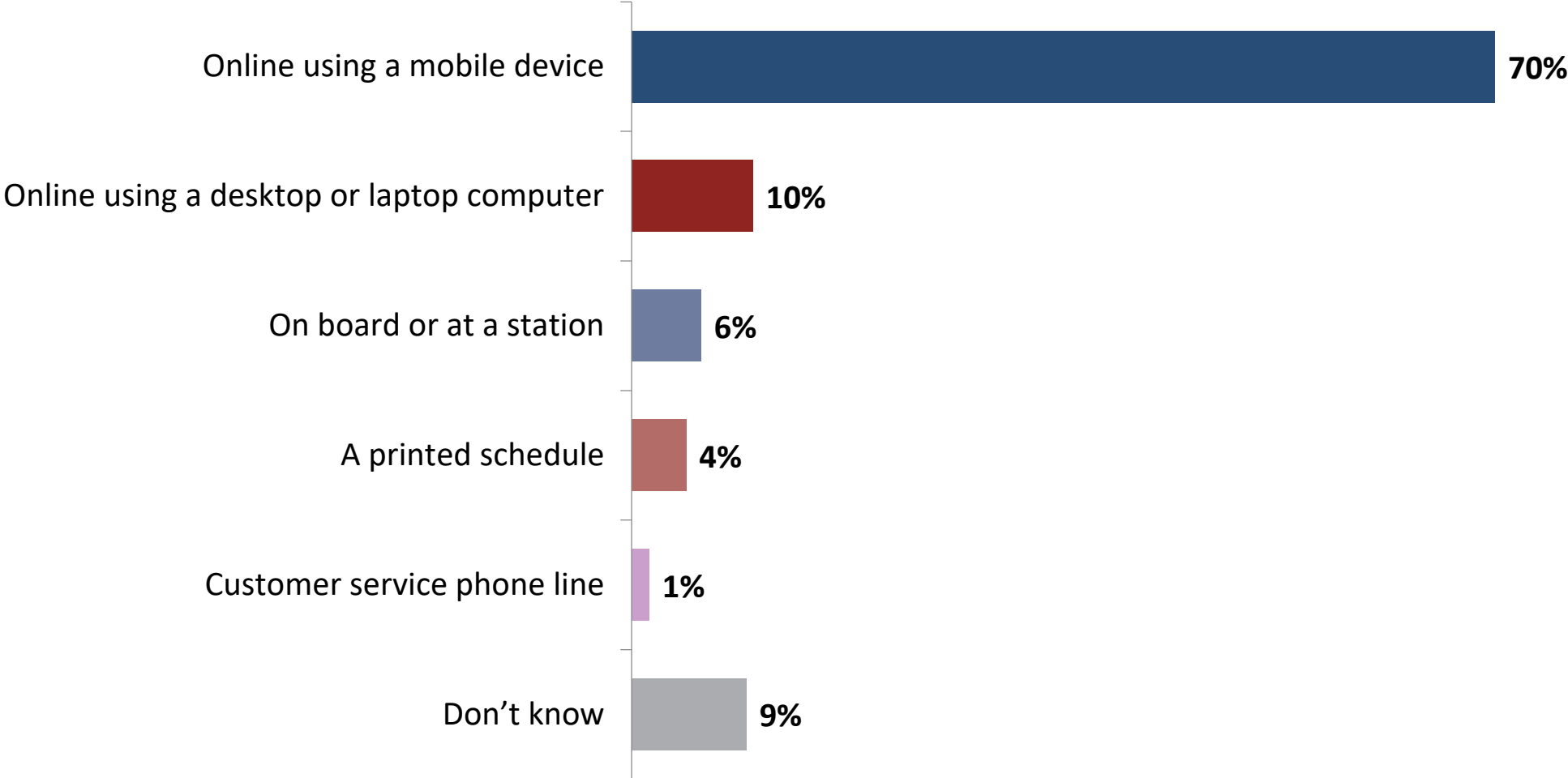




Information

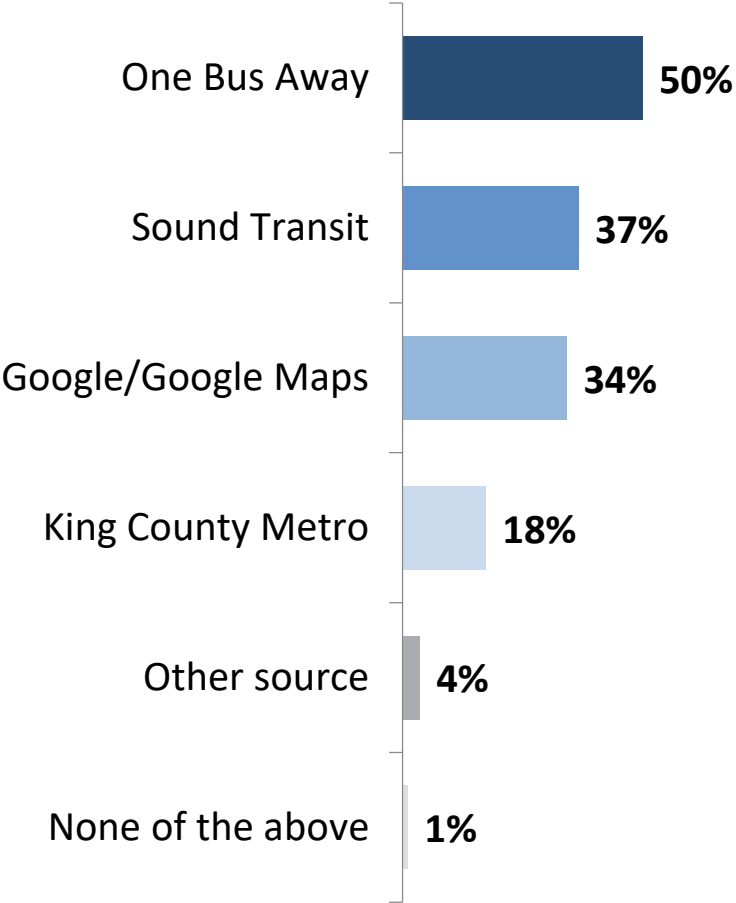
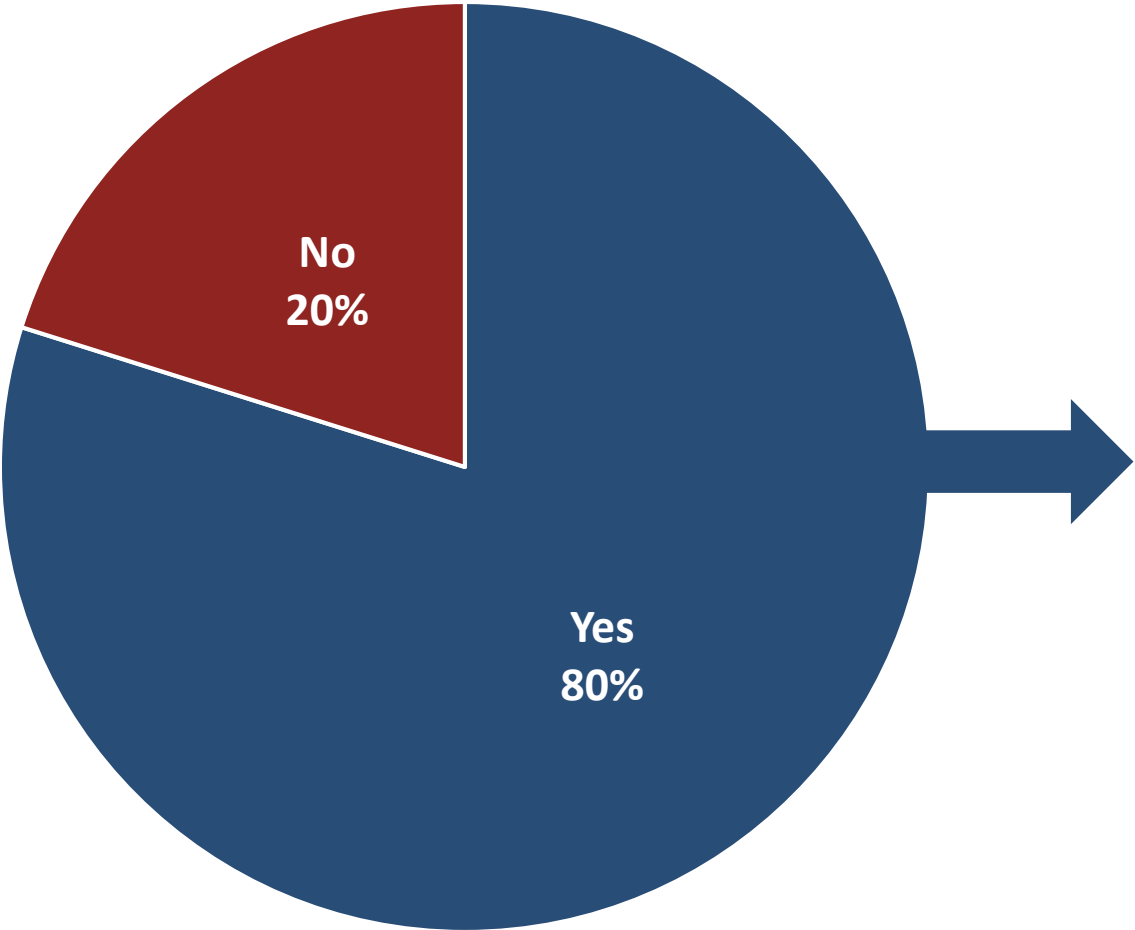
Sources of Information about Schedules and Routes

Over two-thirds of ST riders use a mobile device to access route and schedule information. Significantly smaller portions use a desktop/laptop, on-board/station postings, or printed schedules.



Cell Phone or Tablet Use

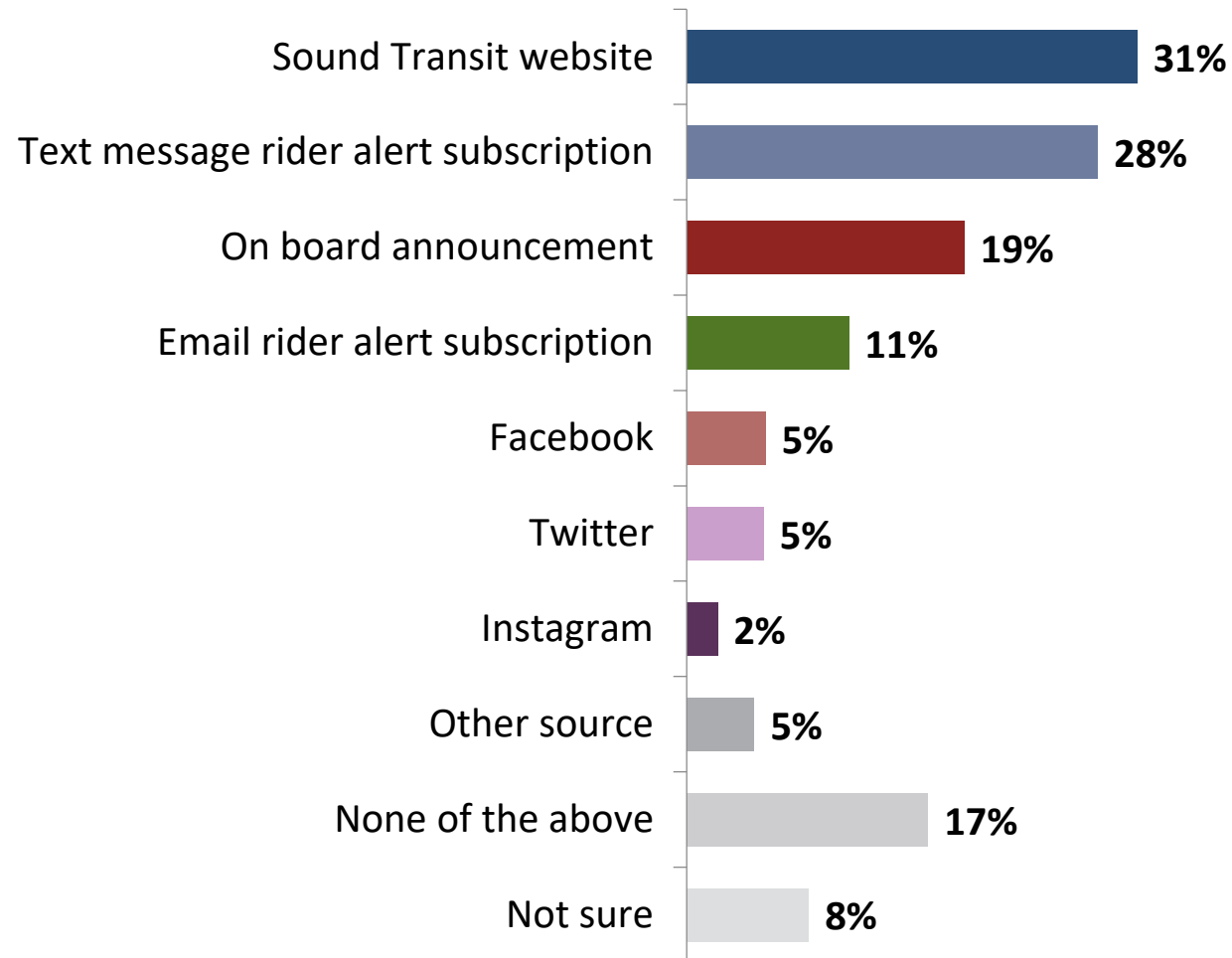
Among the four-in-five riders who use a mobile device to access schedules, half use the One Bus Away app followed by a third who use ST's mobile site and a third who use Google Maps.



Q39. Do you use your cell phone or tablet to access transit schedules on the web?
Q40. Which sources do you use to access schedules on your cell phone or tablet? (n=1560)

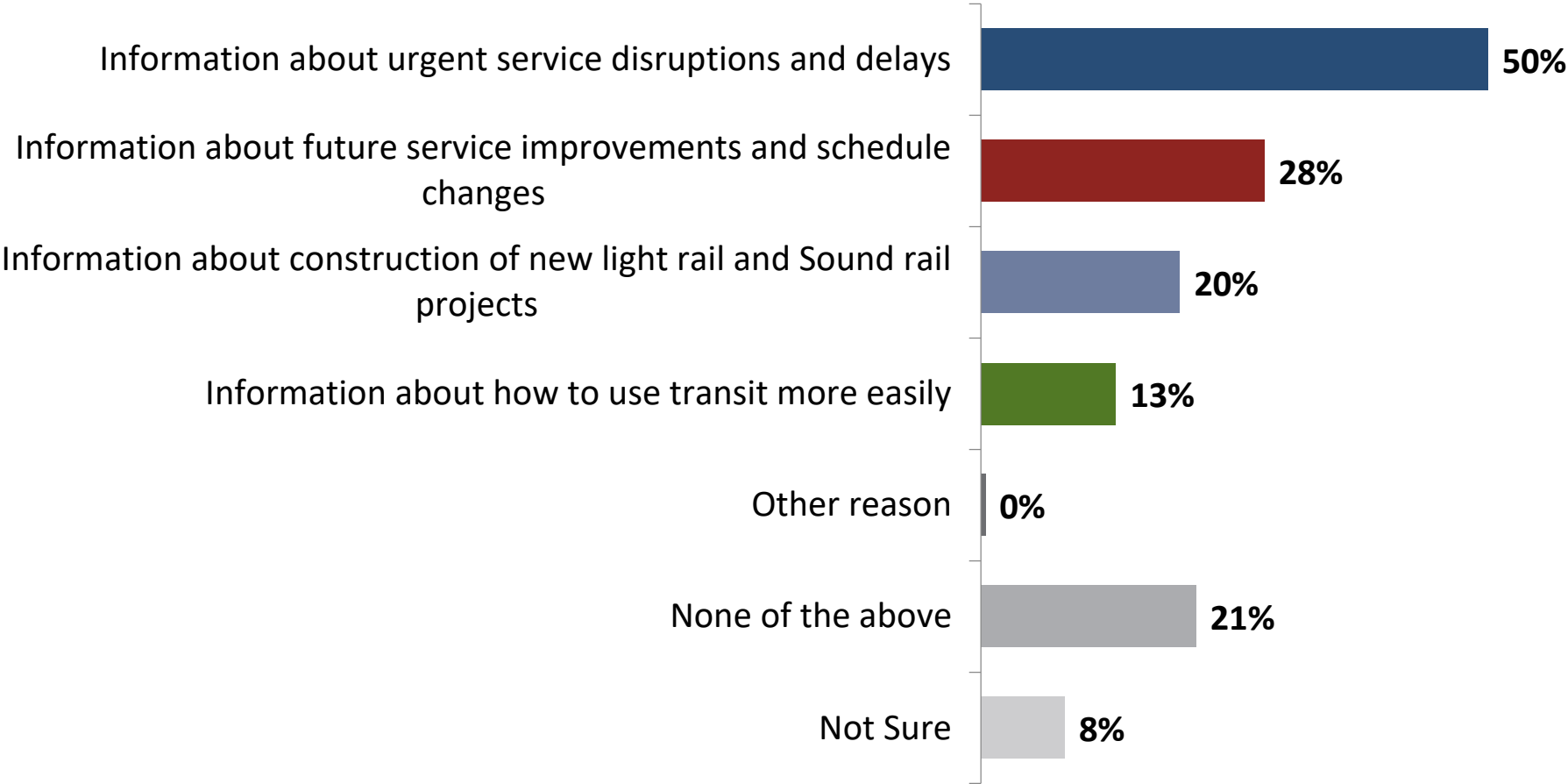
Information Sources for Service Notifications

To receive information about service disruptions or delays, riders are most likely to use the ST website or subscribe to rider alerts via text, with over a quarter of ST riders doing each. About one-in-five rely on on-board announcements and one-in-ten subscribe to email rider alerts.



Information Priorities

Half of ST riders consider communications about urgent service disruptions and delays to be the most important transit information. A quarter are most interested in future service improvement and schedule change info, and one-in five are most interested in construction updates.



Q41. Considering the information you receive about Sound Transit, which of the following are most important to you?



Demographics

Rider Demographics – Gender and Age

	Overall	Express bus	Sounder Seattle- Everett	Sounder Seattle- Lakewood	Tacoma Link	Link
Male	48%	50%	39%	41%	49%	47%
Female	49%	45%	54%	55%	48%	51%
(Unknown/Other)	3%	4%	7%	3%	4%	1%
18-29	36%	35%	21%	25%	23%	38%
30-39	25%	25%	14%	29%	23%	25%
40-49	16%	17%	26%	22%	16%	14%
50-64	16%	16%	28%	21%	19%	16%
65+	5%	4%	6%	2%	11%	7%

Rider Demographics - Ethnicity

	Overall	Express bus	Sounder Seattle- Everett	Sounder Seattle- Lakewood	Tacoma Link	Link
White/Caucasian	60%	55%	71%	64%	63%	63%
Black/African-American	11%	11%	6%	8%	10%	12%
Asian	14%	17%	5%	7%	5%	13%
Native Hawaiian/ Pacific Islander	1%	1%	1%	3%	2%	1%
American Indian/Alaska Native	1%	1%	-	<1%	3%	1%
Hispanic/Latino	5%	5%	2%	6%	5%	4%
Bi or Multi-racial	5%	6%	6%	6%	7%	4%
Something else	1%	2%	1%	1%	2%	1%
Don't know	<1%	<1%	1%	<1%	1%	<1%
Refused	2%	4%	8%	4%	3%	1%

Rider Demographics – Employment Status

	Overall	Express bus	Sounder Seattle-Everett	Sounder Seattle-Lakewood	Tacoma Link	Link
Employed 30+ hours per week	70%	67%	85%	87%	32%	70%
Employed <30 hours per week	5%	7%	3%	2%	14%	3%
Self-employed	4%	5%	1%	1%	6%	4%
Retired	4%	3%	2%	1%	11%	5%
Homemaker	<1%	<1%	1%	-	2%	1%
Student	13%	12%	5%	7%	19%	15%
Unemployed	2%	2%	-	1%	13%	1%
Something else	1%	1%	1%	1%	4%	1%
Refused	1%	2%	3%	1%	1%	-

Rider Demographics – Annual Household Income

	Overall	Express bus	Sounder Seattle- Everett	Sounder Seattle- Lakewood	Tacoma Link	Link
<\$30K	12%	14%	6%	7%	38%	10%
\$30K - <\$50K	14%	15%	8%	14%	18%	12%
\$50K - <\$75K	11%	12%	17%	18%	14%	9%
\$75K - <\$100K	9%	11%	14%	16%	4%	8%
\$100K - <\$200K	10%	14%	29%	23%	3%	5%
\$200K+	3%	4%	4%	6%	-	2%
Don't know/Refused	40%	30%	21%	16%	23%	53%

Rider Demographics – Length of Ridership

	Overall	Express bus	Sounder Seattle- Everett	Sounder Seattle- Lakewood	Tacoma Link	Link
First time riding	3%	1%	4%	3%	5%	4%
< 6 months	11%	13%	17%	14%	18%	8%
6 months - < 1 Year	8%	9%	10%	10%	5%	8%
1 - 2 years	17%	17%	18%	17%	18%	17%
2 - 3 years	16%	14%	15%	17%	11%	18%
3 - 4 years	10%	9%	10%	12%	4%	9%
4 - 5 years	11%	8%	5%	6%	8%	14%
5 to 10 years	15%	14%	15%	13%	13%	16%
> 10 years	5%	11%	3%	5%	11%	1%
Since it started	4%	2%	2%	3%	7%	6%
Don't know/Refused	<1%	<1%	1%	<1%	1%	-

Summary of Findings – Overall ST Grades

- ▶ Nine in ten riders rate Sound Transit positively (A or B grade), including two-fifths who give the agency an A grade. One-in-ten give ST a C grade or lower.
- ▶ Although the combined share of overall positive A and B grades has remained consistent over the last several years, positive intensity has fluctuated since 2016.
- ▶ Over the last few years, average ST grades have remained consistent across riders on most services – including Link, Express bus, Northline Sounder, and Tacoma Link – albeit with fluctuations in positive intensity (A grades). The key exception is among Southline Sounder riders, who have given ST steadily declining marks since 2013.
- ▶ Those giving the agency a C or lower grade cite late on-time-performance, crowdedness, and not enough service as the top critical reasons for those grades.
- ▶ In giving top-of-mind suggestions for service improvement, both Southline and Northline Sounder riders suggest a variety of service improvements pertaining to service performance (better on-time performance) and structurally (more frequency, expanded service hours, more routes/destinations, and – for Southline riders – more parking.
- ▶ Expanding the number of routes and destinations and running earlier or later are the top suggestions among Link, Tacoma Link riders, while Express bus riders want more frequent service along with a variety of other things. Tacoma Link riders largely want expanded service to more places.

Summary of Findings – Overall Attribute Grades

- ▶ There is a wide variance in attribute A grades across each of Sound Transit’s services. Positive intensity is relatively low for service disruption/delay communication (26-39% A) among riders of all services.
- ▶ Sounder riders also give the lowest ratings for on-time performance, though their other most critical attribute – frequency of trains – is largely structural.
- ▶ Several customer service benchmarks (physical condition of stops, cabin cleanliness, and on-time performance) remain key points of improvement for Express bus riders and cleanliness remains a relative pain point for Tacoma Link.
- ▶ For the customer service attributes which apply to riders of all ST services: on-time performance, service frequency, and travel time have the greatest impact on overall satisfaction with the agency.
- ▶ ST generally performs well on most attributes relative to their level of importance but service frequency remains the largest improvement opportunity, overall. Efforts to further improve and promote on-time performance and travel time should also have a significant impact on strengthening customer satisfaction with the agency, overall.
- ▶ Cleanliness (on-board and at stops/stations), physical condition of stops, and ease of access are overperforming relative to their level of importance. Further improving these items will have relatively less impact on agency-wide satisfaction than the time and frequency performance aspects of ST’s services.
- ▶ Service frequency satisfaction is lowest among Sounder riders, with more than two-in-five giving the attribute a C or lower grade. A third of Express bus riders also give service frequency a lower rating.

Summary of Findings – Express Bus Satisfaction

- ▶ Comparing all of the service attributes for Express bus, specifically, there are a few items ST can focus on for short-term improvement. These attributes include, in order of importance:
 - 1) **On-time performance**
 - 2) **Express bus frequency**
 - 3) **Total travel time**
 - 4) **Communication about urgent service delays**
- ▶ ST Express bus riders are largely satisfied with the other attributes relative to their level of importance. The physical condition and average cleanliness of stops and bus cleanliness are moderately rated but are also less important for the time being. They are worth monitoring and may become areas of focus in the long term.
- ▶ Although on-board and stop/station ratings remain high for Express bus riders, they have reported an uptick in having occasional concerns between 2017 and 2018.
- ▶ Other attributes – including ease of access and operator satisfaction are all currently overperforming given their relative importance levels.

Summary of Findings – Sounder Satisfaction

- ▶ Among Sounder riders, there are a few key service attributes which the service is severely underperforming relative to their impact on overall satisfaction. It is likely these aspects which have driven declining satisfaction with the service over the last few years. Addressing these aspects should have the most immediate impacts on improving satisfaction.
 - 1) On-time performance**
 - 2) Train frequency**
 - 3) Communication about urgent service delays**
 - 4) Total travel time**
- ▶ For Sounder Southline riders, on-time performance grades have been highly volatile over the last few years, with a plurality rating the attribute a C or lower for the first time in 2018. Travel time satisfaction has seen more gradual declines during this time. Travel time and on-time satisfaction ratings have also fallen among Northline Sounder riders but these ratings remain higher than those on Southline Sounder.
- ▶ Otherwise, Sounder is performing well on the rest of the attributes tested, though they are relatively less critical to improving satisfaction compared to the aspects listed above.

Summary of Findings – Link Satisfaction

- ▶ There are a few attributes to target for improvement among Link riders, including:
 - 1) **Average cleanliness of cabin**
 - 2) **Total travel time**
 - 3) **Service disruption/delay communication**
 - 4) **Ease of accessing the stations**
- ▶ Following a peak in travel time and on-time satisfaction in 2015, grades for both attributes have seen some volatility since the U-Link expansion, with particularly sharp drops in 2018.
- ▶ For on-board and station cleanliness, Link riders have reported a relatively sharp drop in satisfaction intensity (A grades) between 2017 and 2018. Most of this shift has gone into B grades and has not translated to a significant influx of negative C/lower grades.
- ▶ An influx of Link riders have also reported having occasional safety concerns compared to previous years, especially at stations. The share of those who are regularly concerned with their safety remains as low as previous years.
- ▶ Other service attributes – including on-time performance, smoothness of the ride, train frequency, train conductor performance, and stop/station condition and cleanliness are rated at or above their anticipated levels of importance towards overall satisfaction with the agency.



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