



2016 Sound Transit Customer Satisfaction Survey Results

DRAFT REPORT



EMC #16-6136

Methodology

- ▶ These results are the 2016 measurements for Sound Transit customer satisfaction. Where possible, results are compared to previous surveys conducted in 2006 – 2015.
- ▶ A total of 2,114 interviews were conducted system-wide between November 14th and December 19th 2016 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.

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Express Bus: (n=923, MoE \pm3.2%)	79%	78%	78%	63%	56%	57%	55%	55%	54%	52%	42%
Link: (n=663, MoE \pm3.8%)	-	-	-	22%	28%	29%	31%	32%	34%	33%	46%
Sounder: (n=434, MoE \pm4.7%)	14%	15%	16%	11%	12%	11%	10%	10%	10%	12%	9%
Tacoma Link: (n=94, MoE \pm10.1%)	7%	7%	6%	4%	4%	4%	4%	3%	3%	3%	2%

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

Changes in the System

Ridership has grown substantially over the last year, but it is distributed unequally across the system. There were than 20% more boardings year to date by September 2016 than there were in September 2015. Link has seen far and away the most growth, with a 60% ridership increase from the previous year. Sounder also saw an 11% growth in ridership since 2015. Ridership on busses is essentially flat, while ridership on Tacoma Link has actually declined slightly.

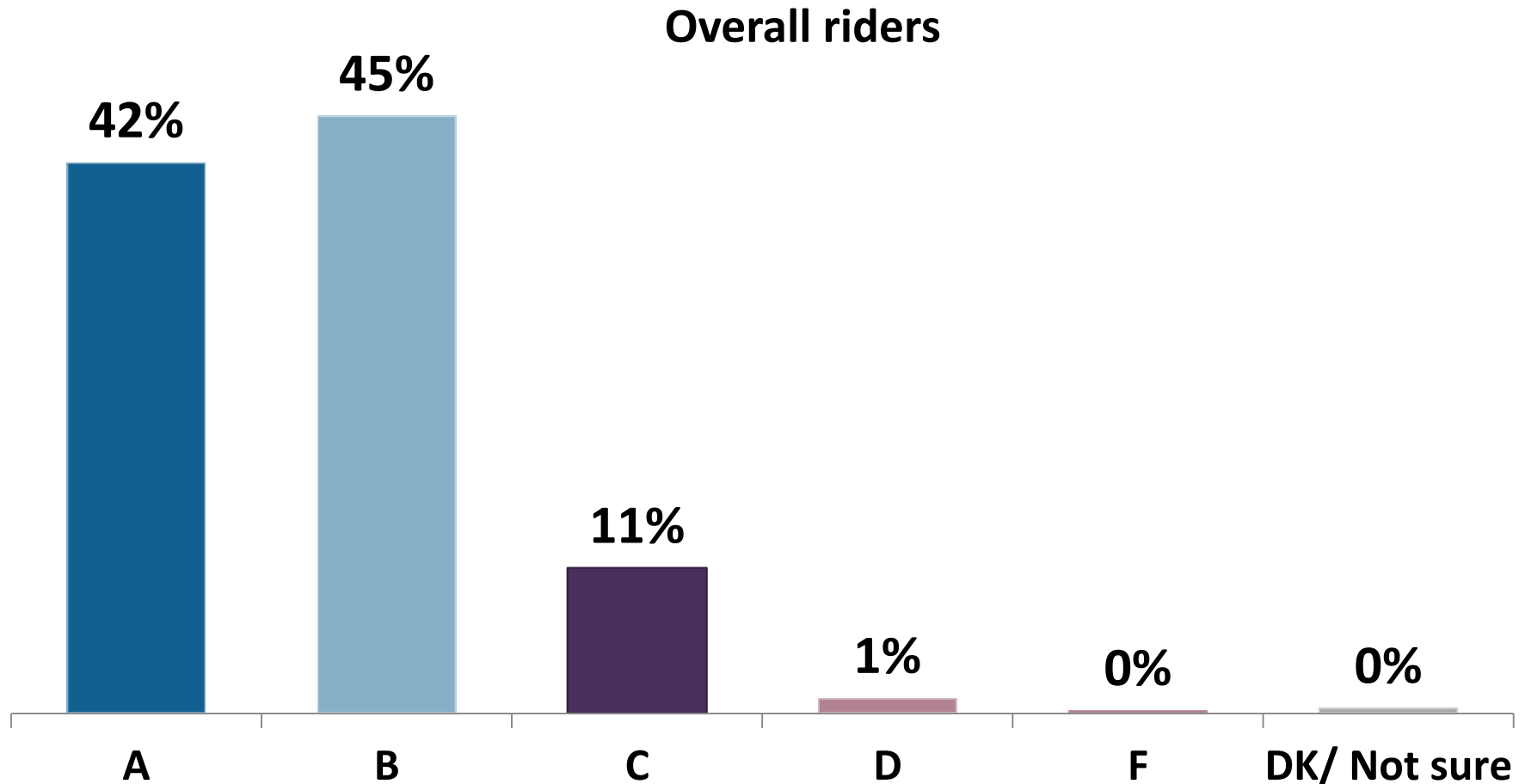
- ▶ *The growth on Link and Sounder indicates there are many more riders experiencing the system for the first time. This may account for some of the changes in ratings for these two services.*
- ▶ *The Link line has changed, with three new stations in 2016 that did not exist in 2015. This change may also be partly responsible for differing opinions on the Link.*
- ▶ *2016 was the first year where Link light rail represented a plurality of Sound Transit's systemwide ridership.*



Agency & Service Grades

2016 Sound Transit Grade Breakdown

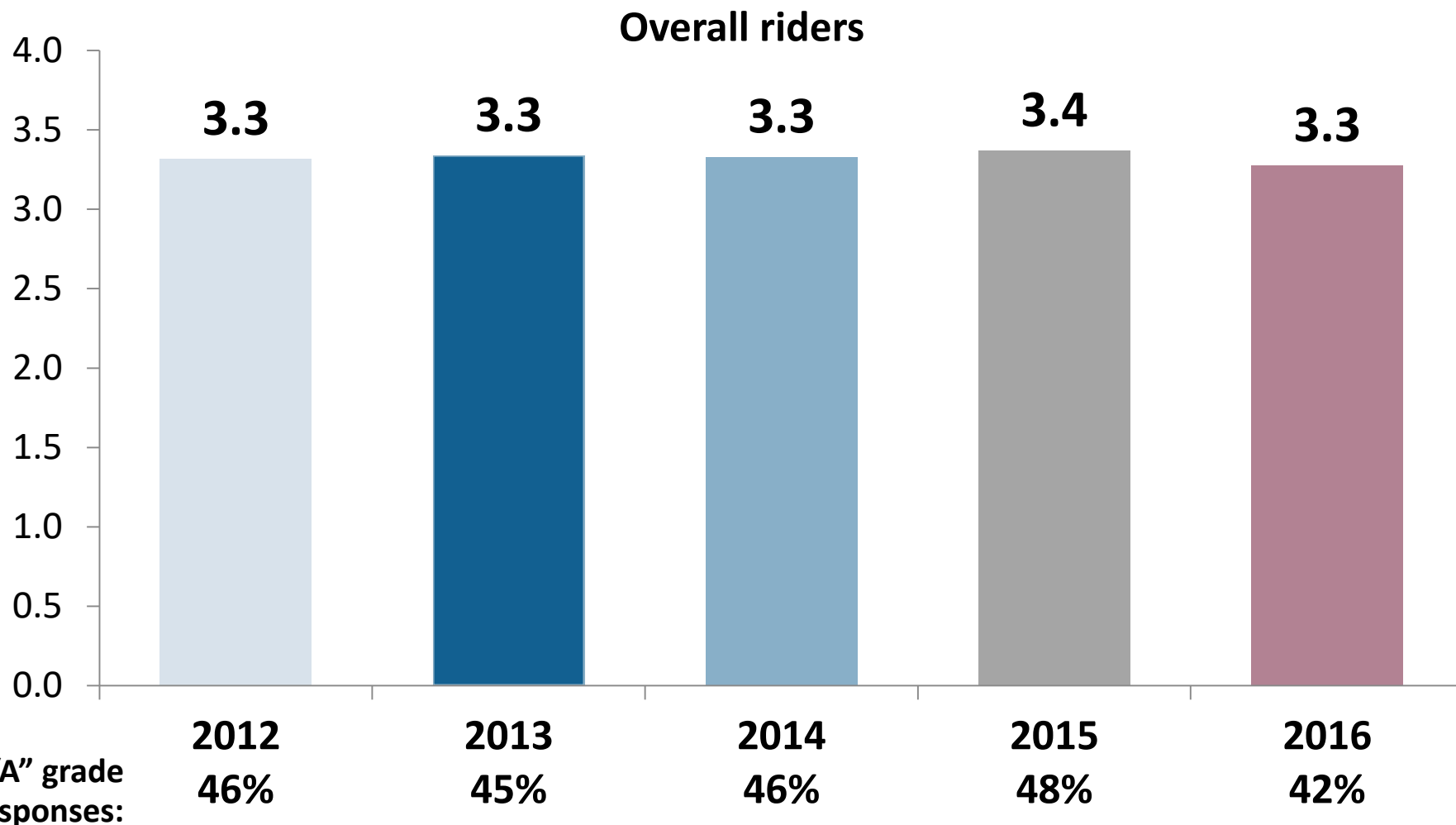
Most riders grade ST an A or B, with a slight plurality giving them a B.



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 Year

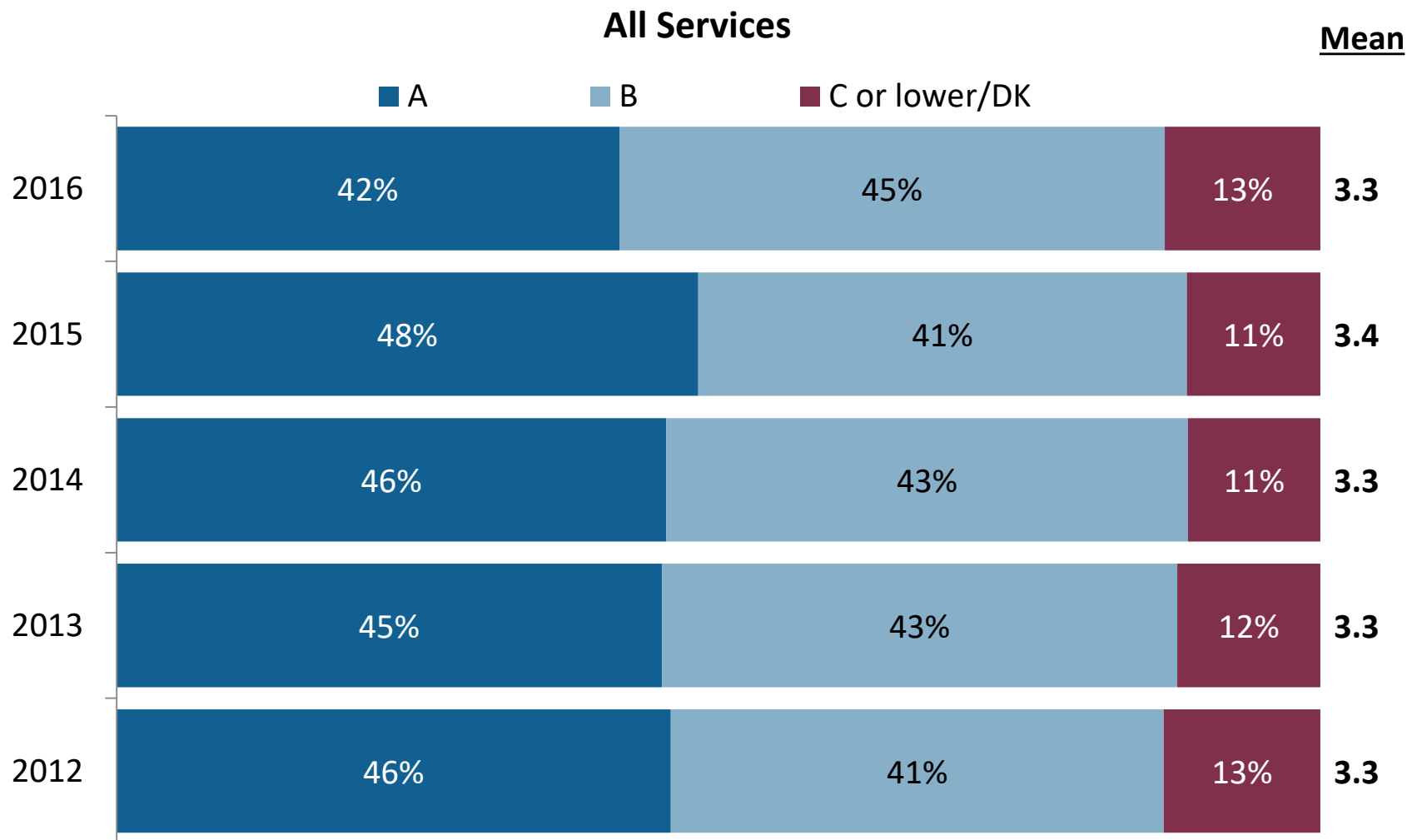
ST's average grade remains generally steady with previous years, although the number giving them an A grade has dropped slightly from 2015.



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 – All Services

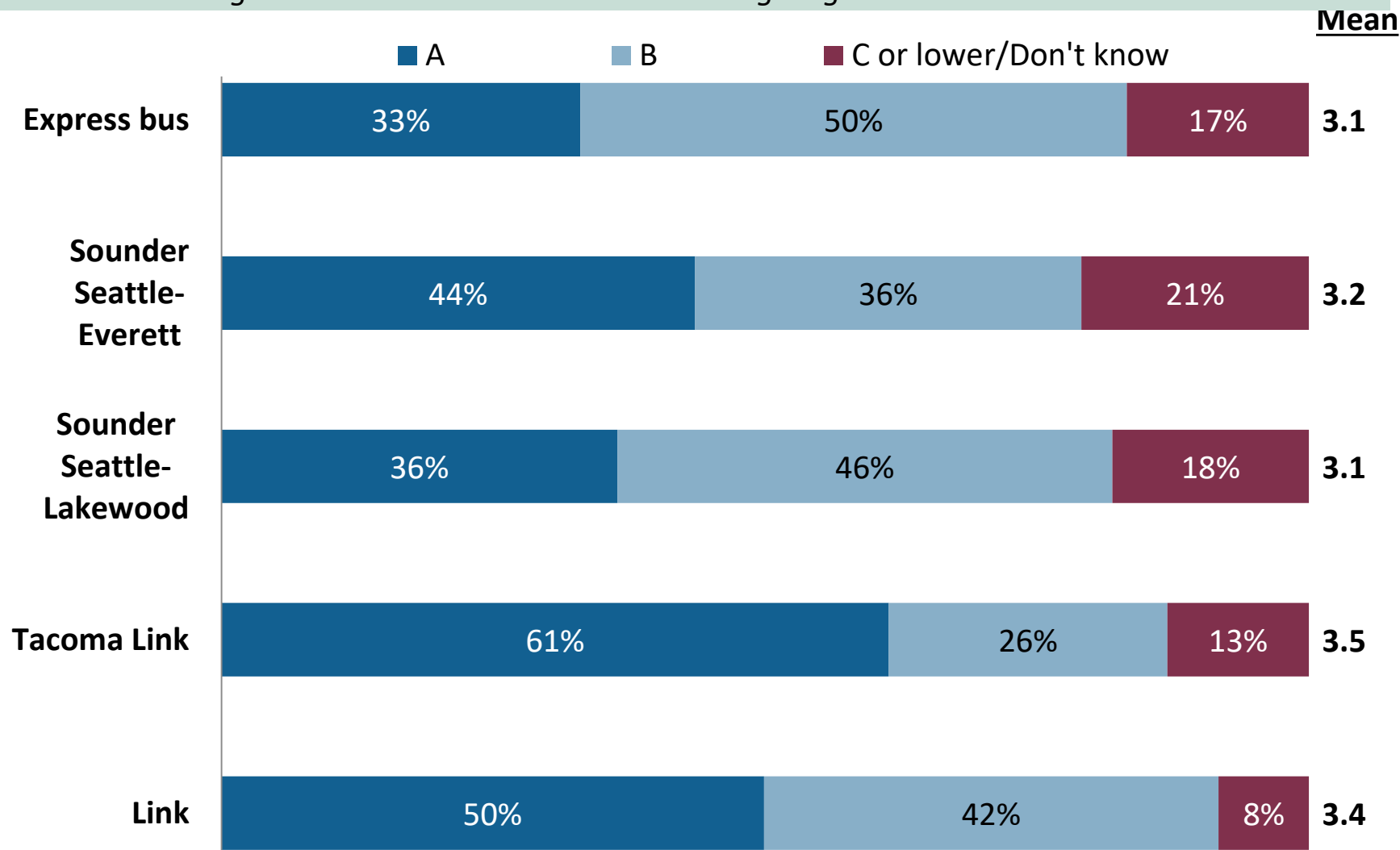
While the average grade overall for ST remains consistent with previous years, there has been a drop in the number of riders giving ST an A, from 48% in 2015 down to 42% in 2016.



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 Service

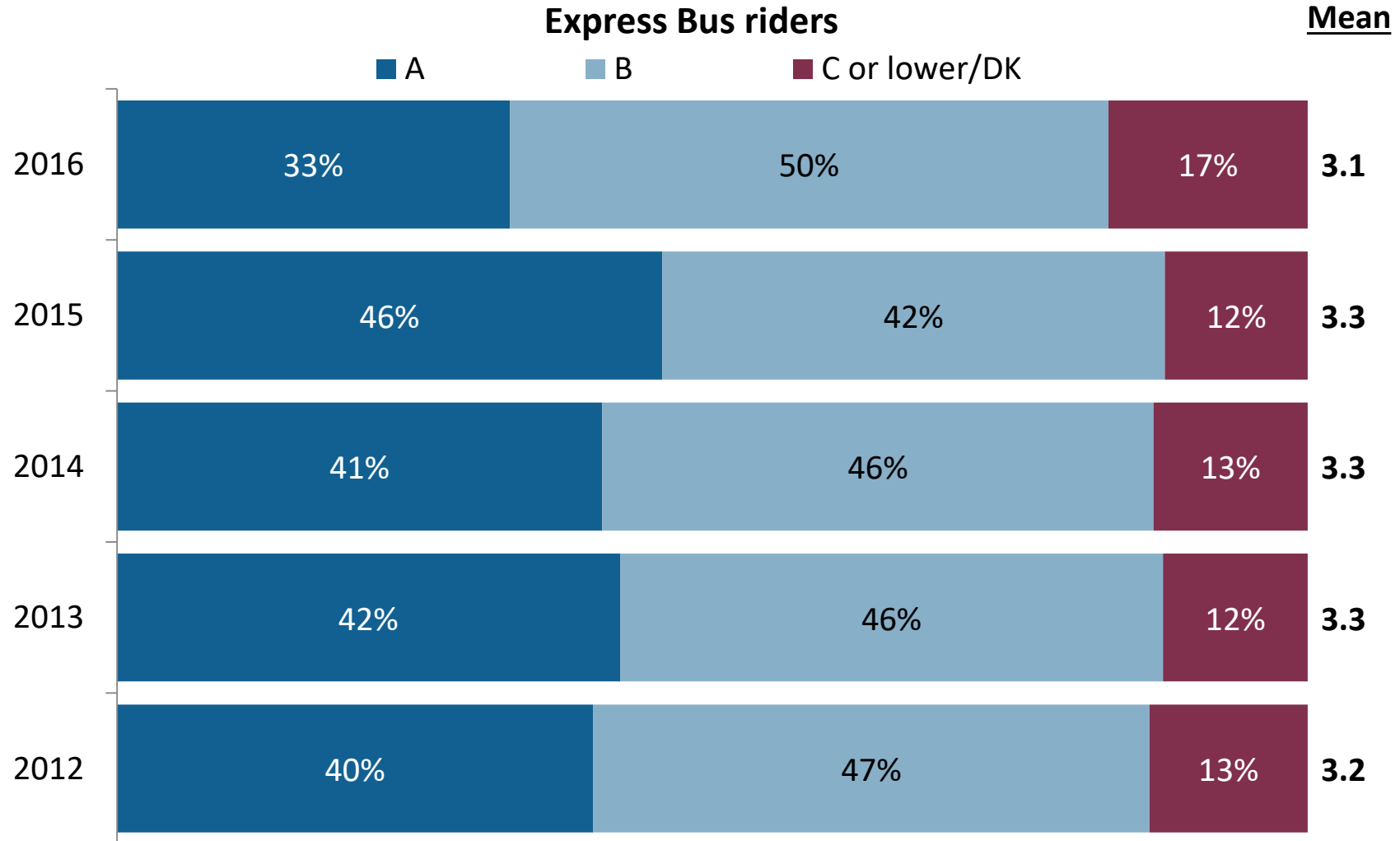
Tacoma Link and Link riders give the highest grades. At least half of riders on these services give ST an A grade. No service has more than 21% giving the service a C or lower.



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 Express Bus Riders

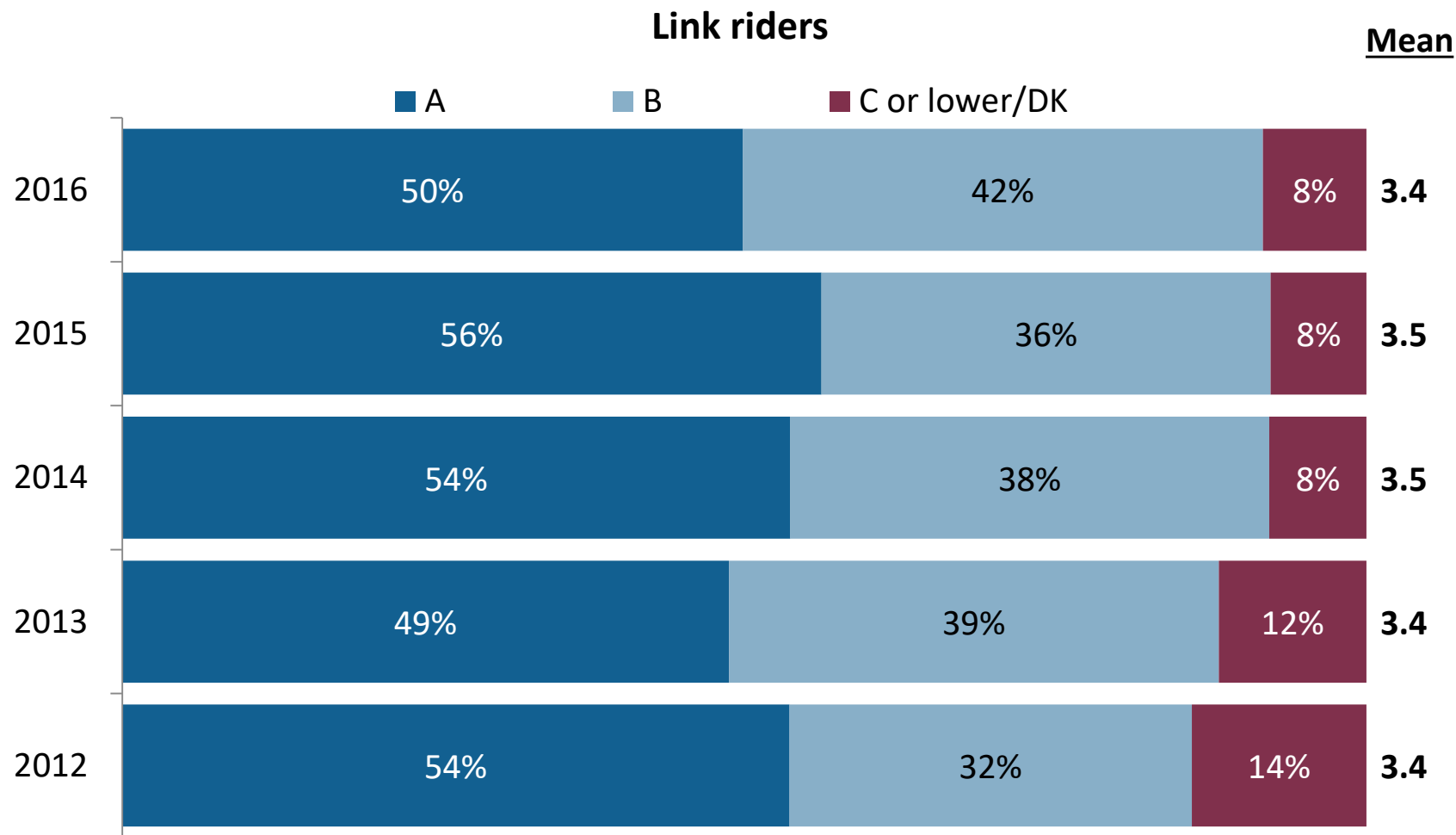
The average grade given by bus riders has dropped, and the number of bus riders giving ST an “A” has declined more than ten points in the last year.



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

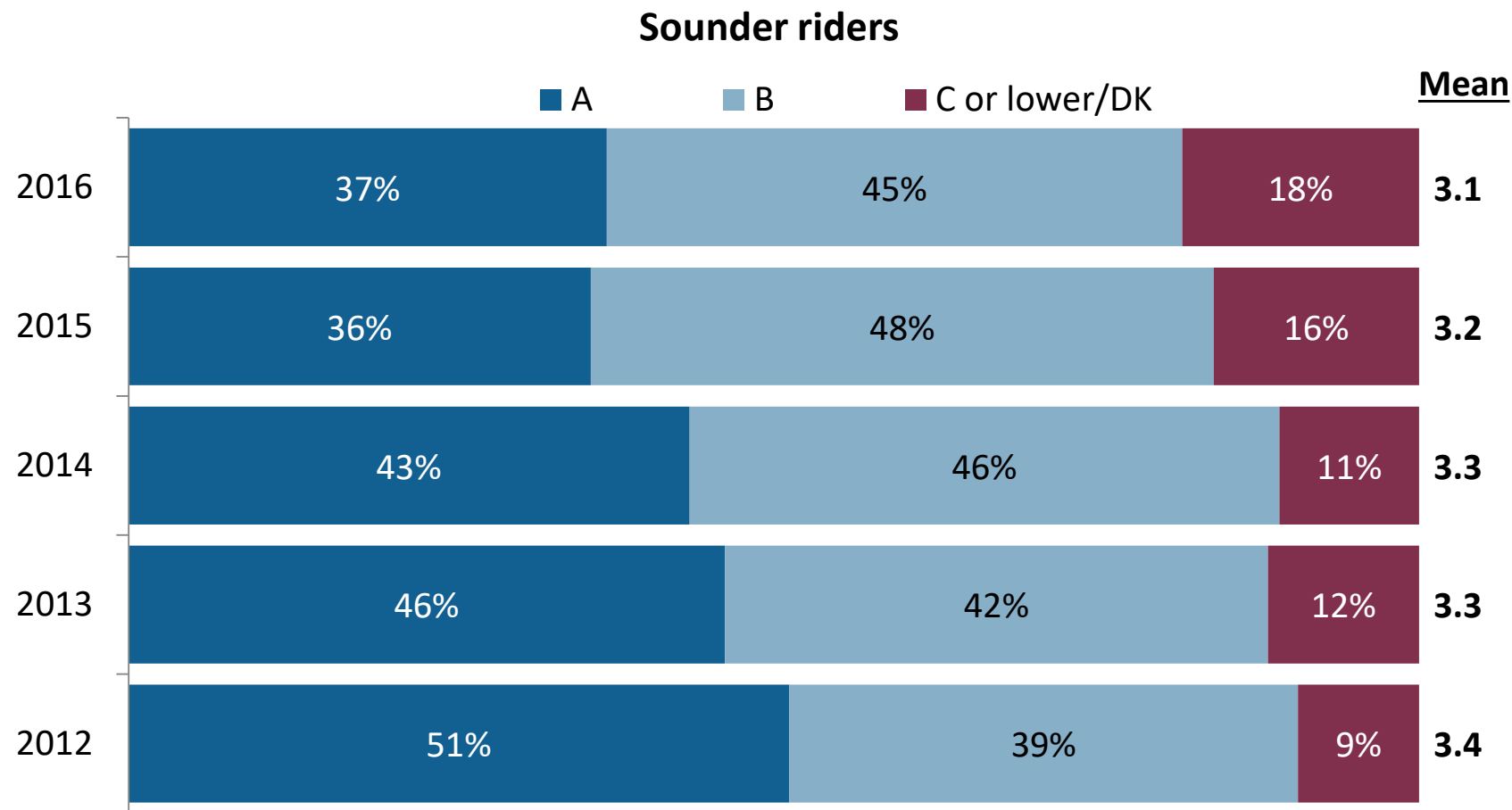
While the average grade of Link riders remains roughly the same with prior years, there has been a slight drop-off in A grades. However, half still grade Link as an A.



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

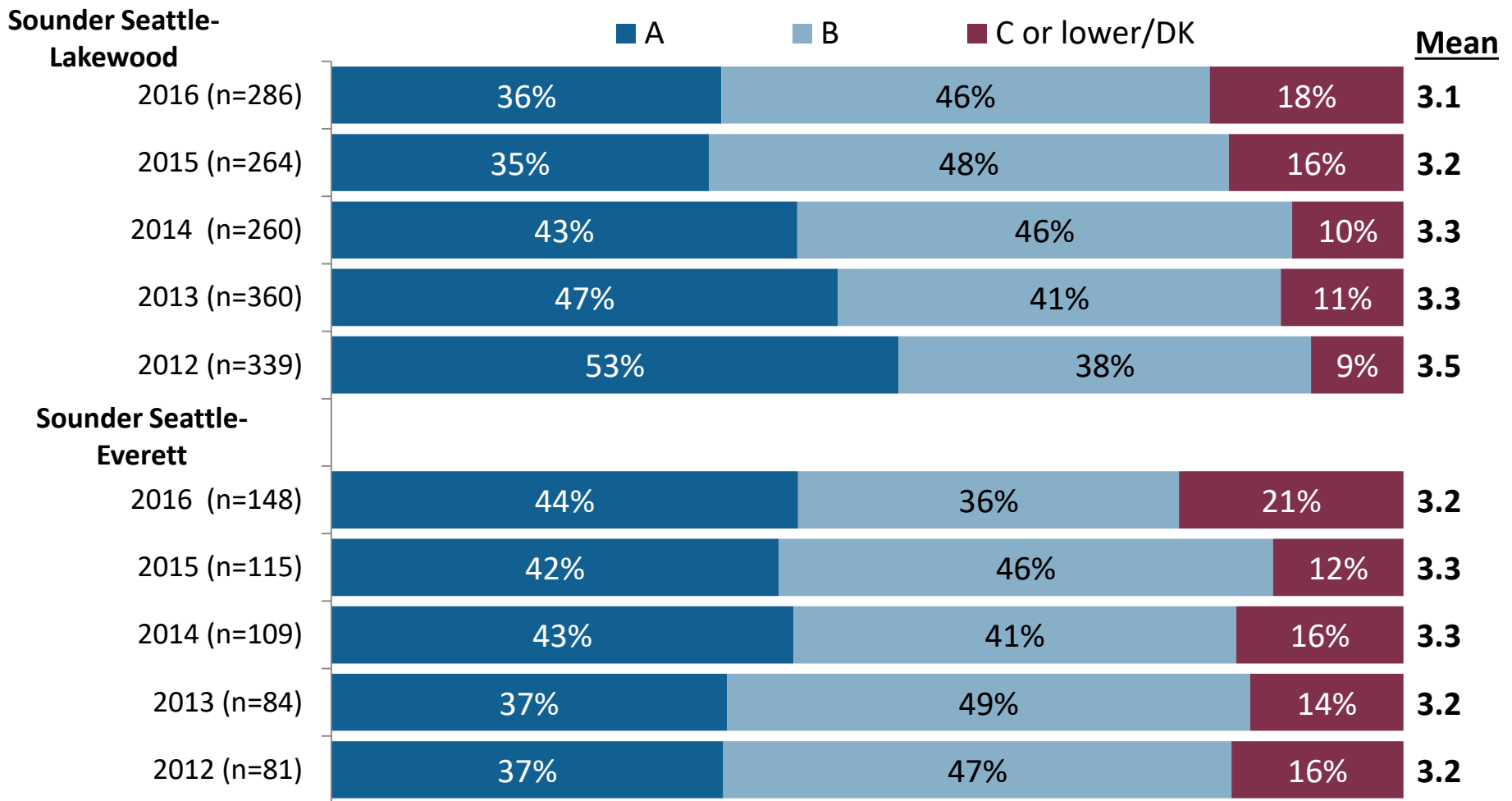
Sounder grades have not rebounded since they began falling in 2016; however in 2016 they did not drop further and generally are consistent with 2015.



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 – Sounder North & South

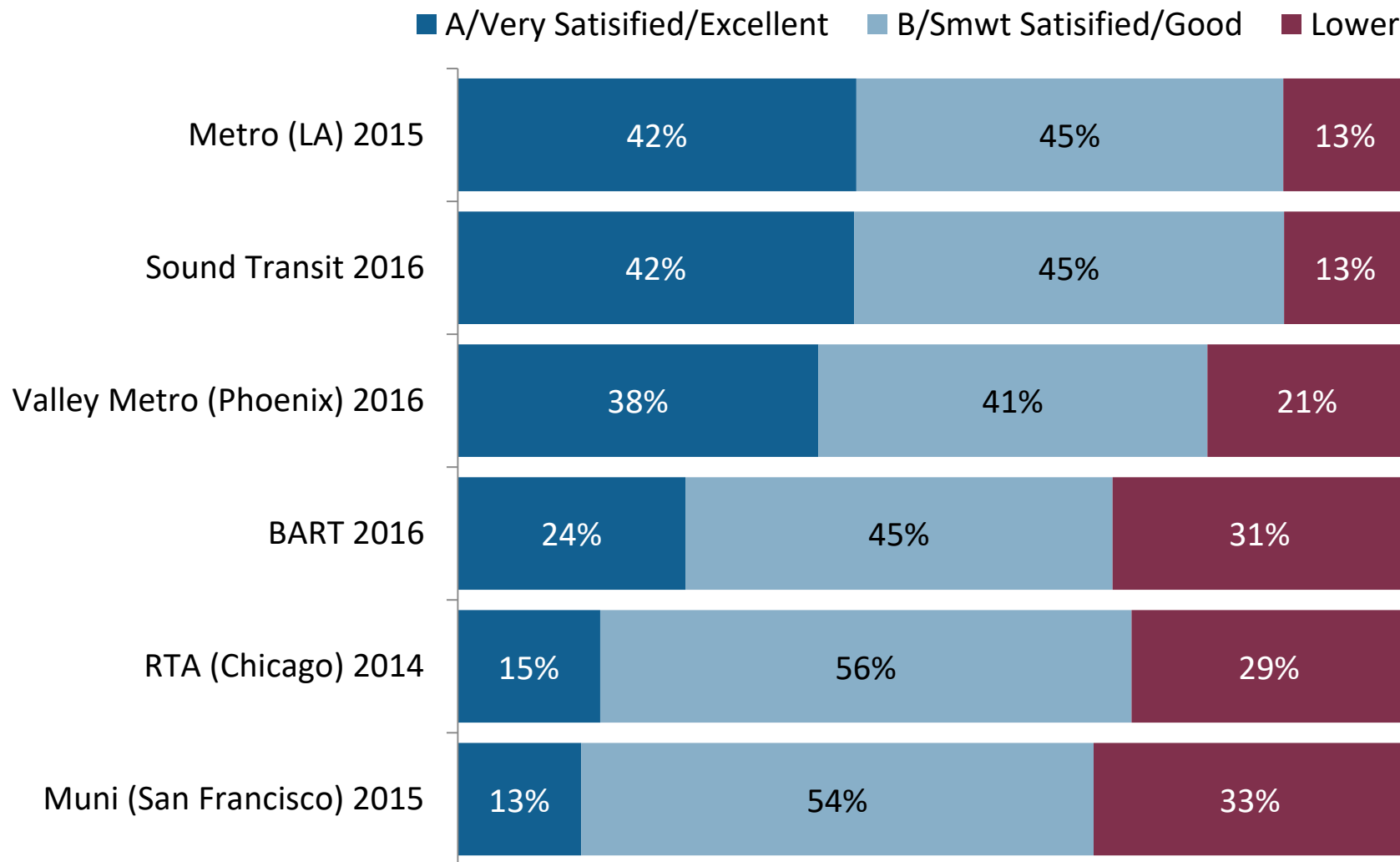
Seattle-Lakewood grades seem to have stabilized with 2015's findings. Seattle-Everett riders give comparatively higher grades, but the number of C grades have risen in the past year on this line.



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?

Benchmarking Against Other Agencies

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



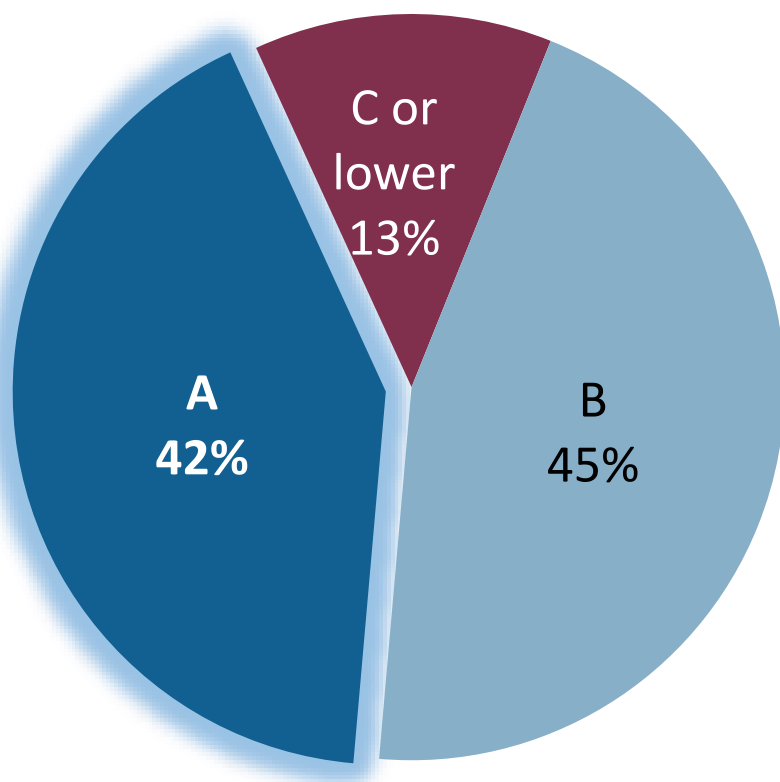


Top-of-Mind Improvements

Grade in Focus: A Grade

Reliability is far and away the top reason for giving an A grade. Ease of use and ability to get to destination also are top reasons for an A grade.

8. Sound Transit Grade



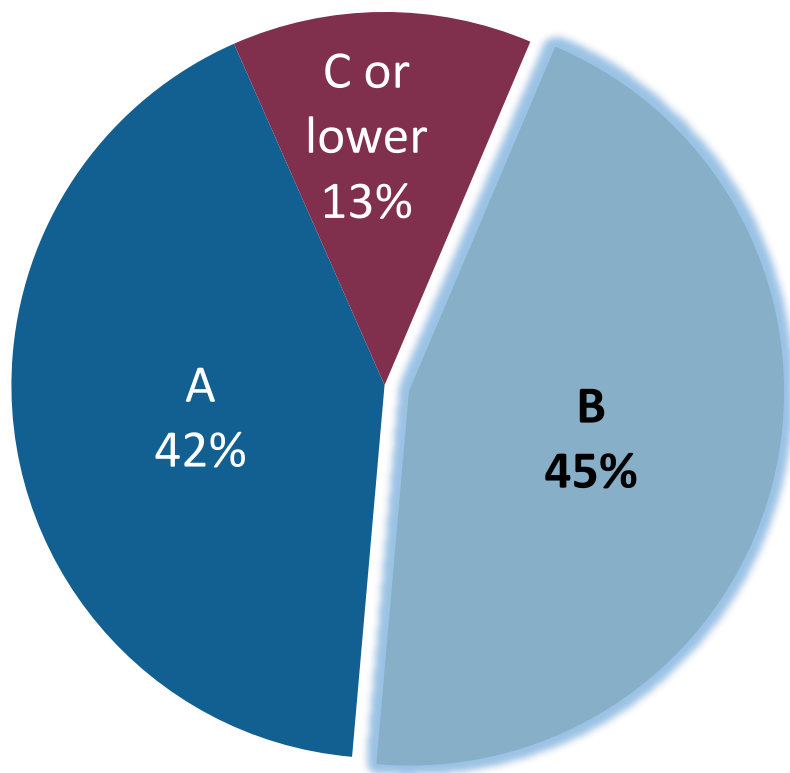
9. Top Reasons for A Grade

	%
Reliable Service/Comes Regularly	48%
Easy to use	19%
Gets to destination fast	17%
Affordable	5%
Nice/Comfortable	5%
Too crowded	1%
Not enough service	1%
Not enough parking	1%
Other	4%
No complaints/No suggestions	1%
(DK)	0%

Grade in Focus: B Grade - Positives

Reliability is also the top mention among B grades, but it is mentioned at a lower frequency compared to A graders. B graders still have generally more positive than negative things to say.

8. Sound Transit Grade



9. Top Positive Reasons for B Grade

%

Reliable Service/Comes Regularly

23%

Easy to use

12%

Gets to destination fast

10%

Affordable

4%

Nice/Comfortable

3%

Other

12%

(DK)

1%

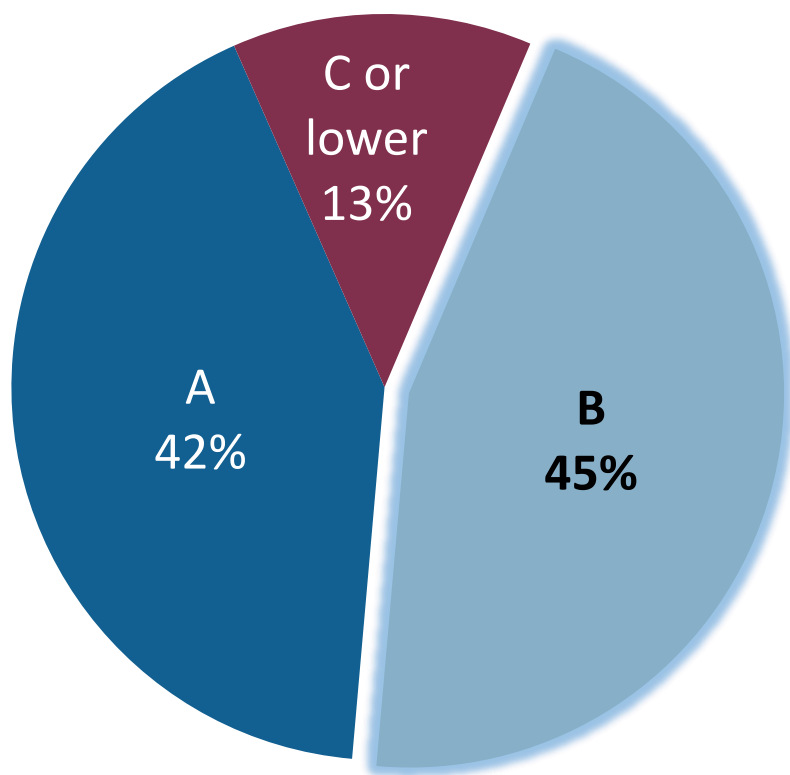
No complaints/No suggestions

2%

Grade in Focus: B Grade - Negatives

While overcrowding is the top complaint among those who give ST a top grade, lateness, lack of service together make up a plurality of negative responses among those who give ST a B.

8. Sound Transit Grade



9. Top Negative Reasons for B Grade

%

Too crowded

9%

Not enough service

7%

Late

5%

Not enough parking

4%

Does not come regularly enough

3%

Too expensive

2%

Bad communication/No explanation of problems/delays

2%

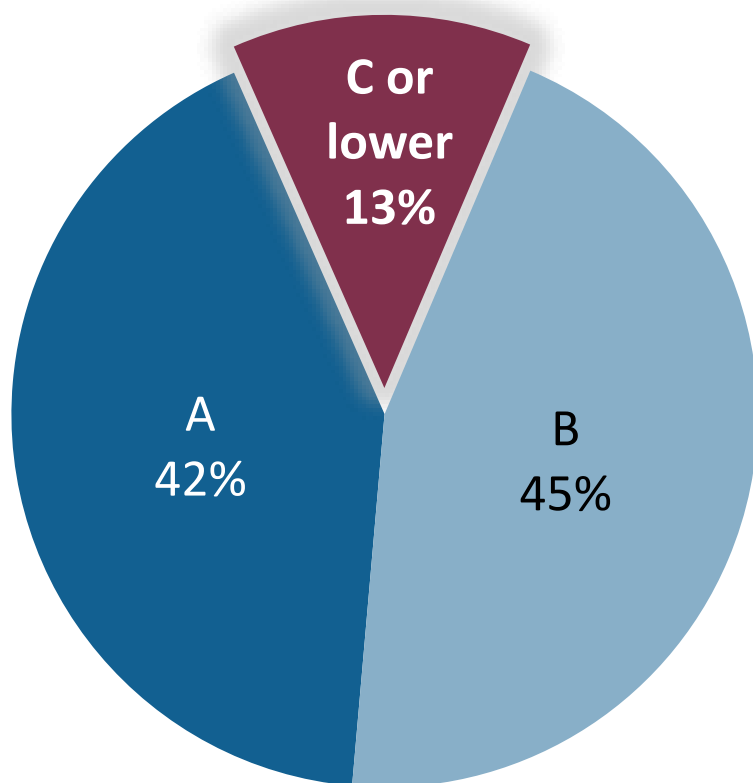
Too slow/Too many stops

1%

Grade in Focus: C Grade

Among those who give ST a C or lower lateness, lack of service, and crowding are top tier mentions.

8. Sound Transit Grade



9. Top Reasons for C Grade

	%
Late	18%
Not enough service	16%
Too crowded	15%
Does not come regularly enough	8%
Bad communication/No explanation of problems/delays	6%
Reliable Service/Comes Regularly	3%
Nice/Comfortable	3%
Too slow/Too many stops	3%
Gets to destination fast	2%
Affordable	2%
Too expensive	2%
Rude drivers/personnel	2%
Not enough parking	2%
Easy to use	1%
Other	12%
No complaints/No suggestions	3%
(DK)	2%

Improving Grade – by Service

Riders of different services have different concerns. A plurality of bus riders want more frequent service. Sounder riders have more diffuse concerns. Link and Tacoma Link riders want more routes. Demand for more service was also a top suggested improvement in 2015.

	Overall	Express Bus	Sounder Seattle-Everett	Sounder Seattle-Lakewood	Tacoma Link	Link
Have more routes/go more places	17%	12%	13%	10%	22%	23%
Less time between service/Run more frequently	14%	21%	11%	15%	4%	9%
Get longer buses/train, fix overcrowding	10%	8%	10%	12%	1%	13%
Be on time	8%	13%	11%	14%	3%	3%
Run earlier or later	7%	6%	14%	13%	5%	6%
More parking	5%	4%	3%	13%	4%	5%
Lower fares	4%	6%	1%	1%	0%	4%
Better communication when there are problems	4%	3%	5%	8%	0%	3%
Improve scheduling	2%	3%	5%	2%	1%	1%
Get cleaner or new bus/trains	1%	2%	0%	0%	0%	1%
Other	12%	11%	16%	7%	31%	13%
Don't Know	1%	1%	0%	0%	2%	2%
Refused	0%	0%	0%	0%	1%	0%
No complaints/No suggestions	13%	9%	9%	5%	27%	17%

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

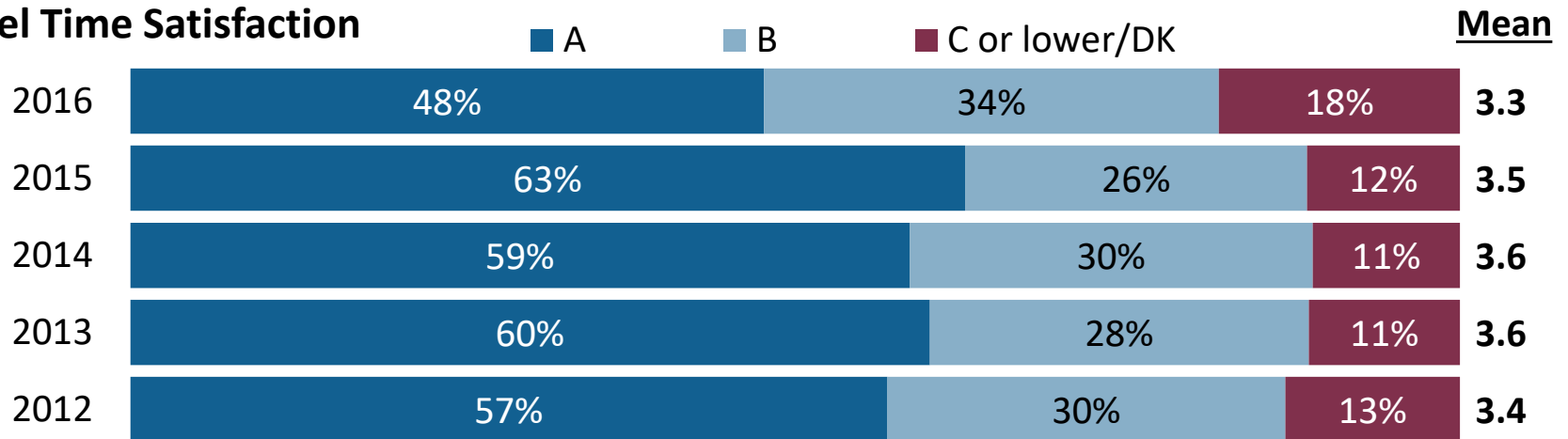


Performance Attribute Ratings and Grades: Time Satisfaction

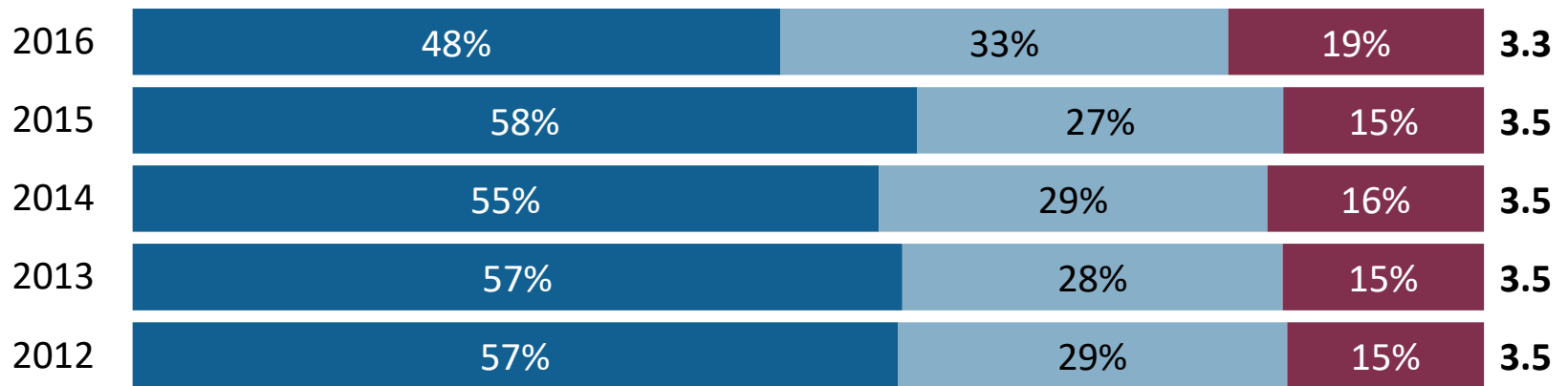
Time Satisfaction – Overall Year-to-Year

Satisfaction with on-time arrival and total travel time have both dropped off.

Travel Time Satisfaction



On-Time Satisfaction



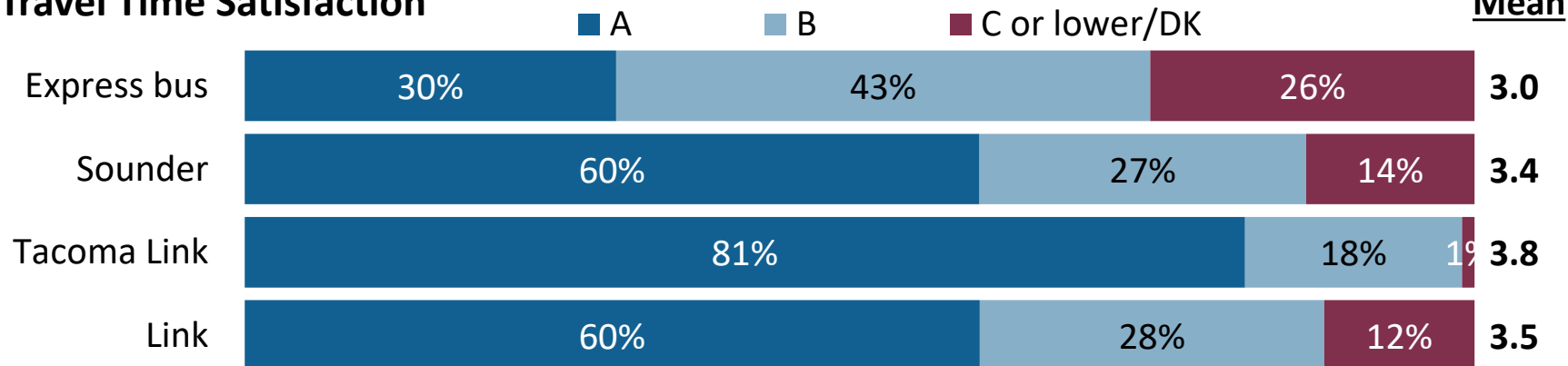
20. The total travel time it takes to get to your destination

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

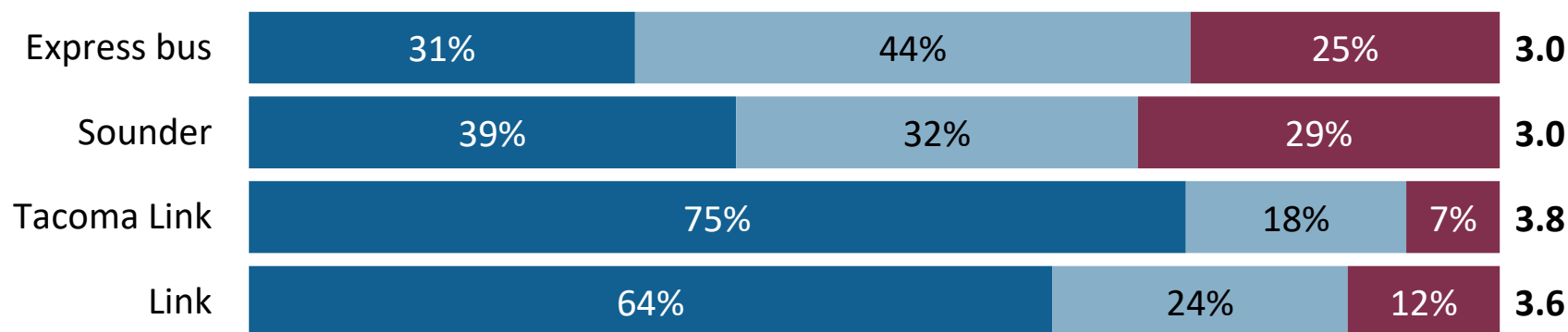
Time Satisfaction – by Service

Bus riders have the highest dissatisfaction with on-time arrival and total travel time. Sounder riders also have lower satisfaction with on-time performance than most other services.

Travel Time Satisfaction



On-Time Satisfaction



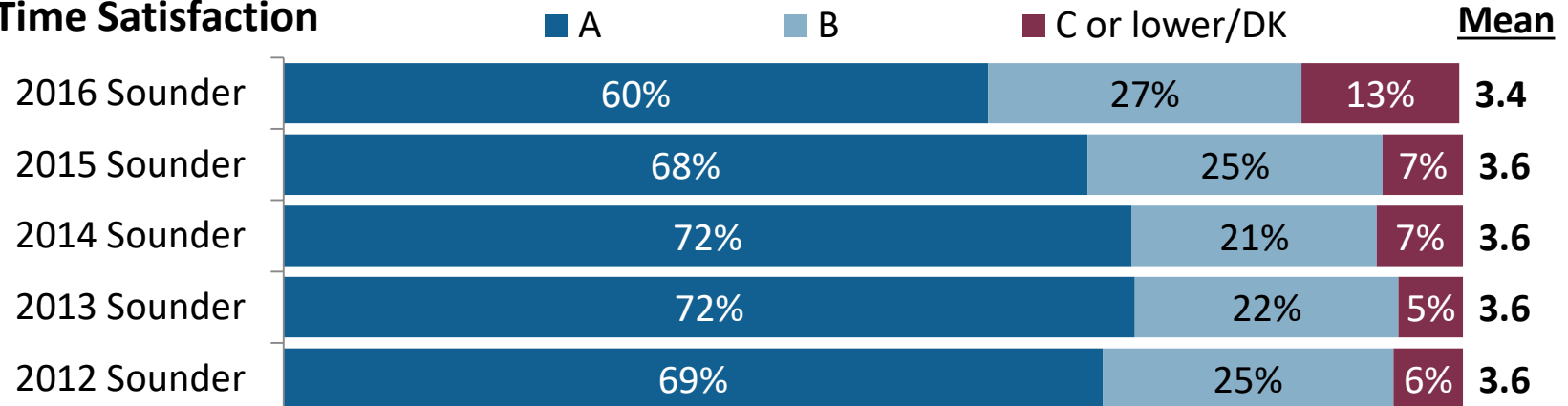
20. The total travel time it takes to get to your destination

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

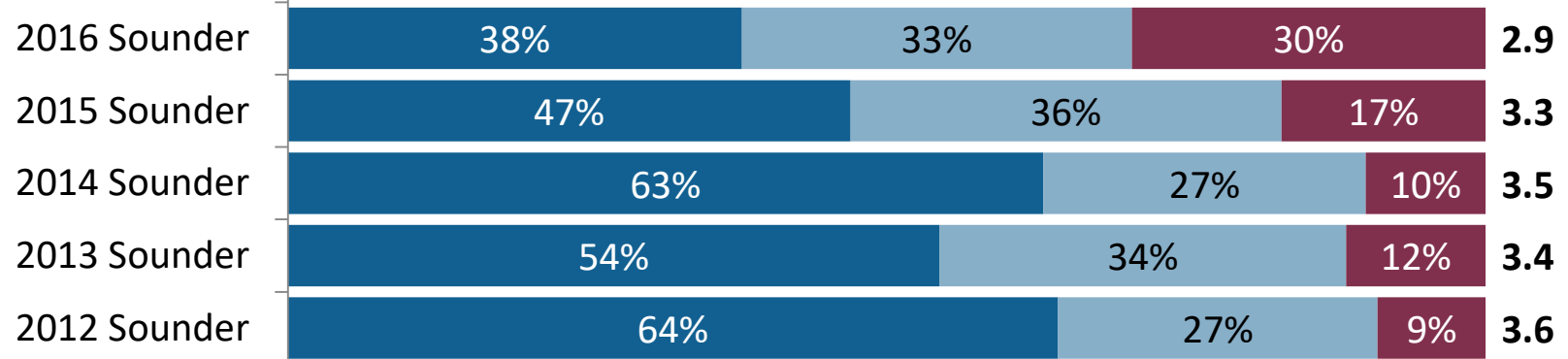
Time Satisfaction – Sounder Sea-Lakewood Year-by-Year

Dissatisfaction with travel time has grown slightly among Sounder Seattle-Lakewood riders, but there has been a marked increase in dissatisfaction with on-time performance.

Travel Time Satisfaction



On-Time Satisfaction



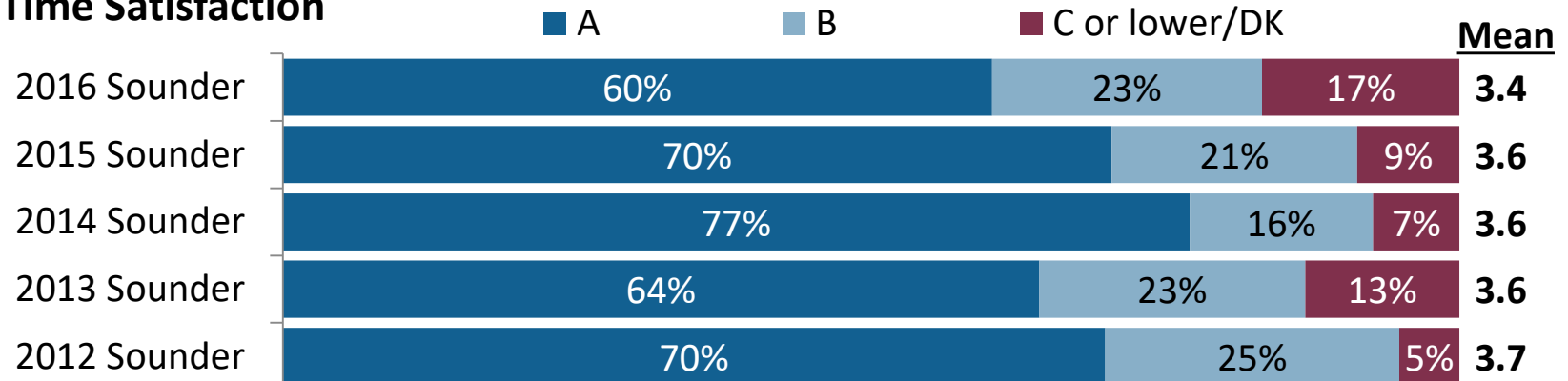
20. The total travel time it takes to get to your destination

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

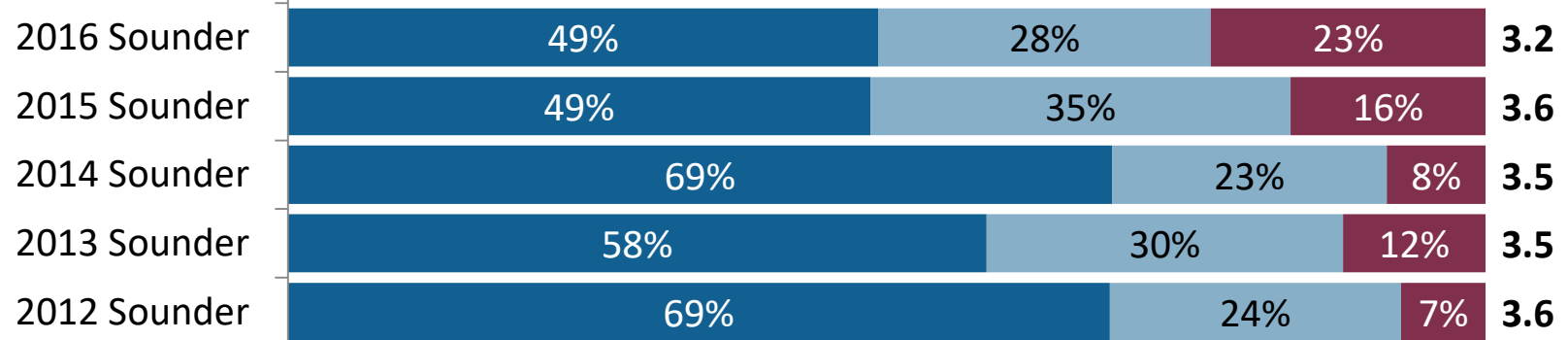
Time Satisfaction – Sounder Sea-Everett Year-by-Year

Among Sounder Sea-Everett riders there has been modest declines in satisfaction for the total travel time and for on-time performance. Satisfaction with on time performance appears to be better on this line.

Travel Time Satisfaction



On-Time Satisfaction

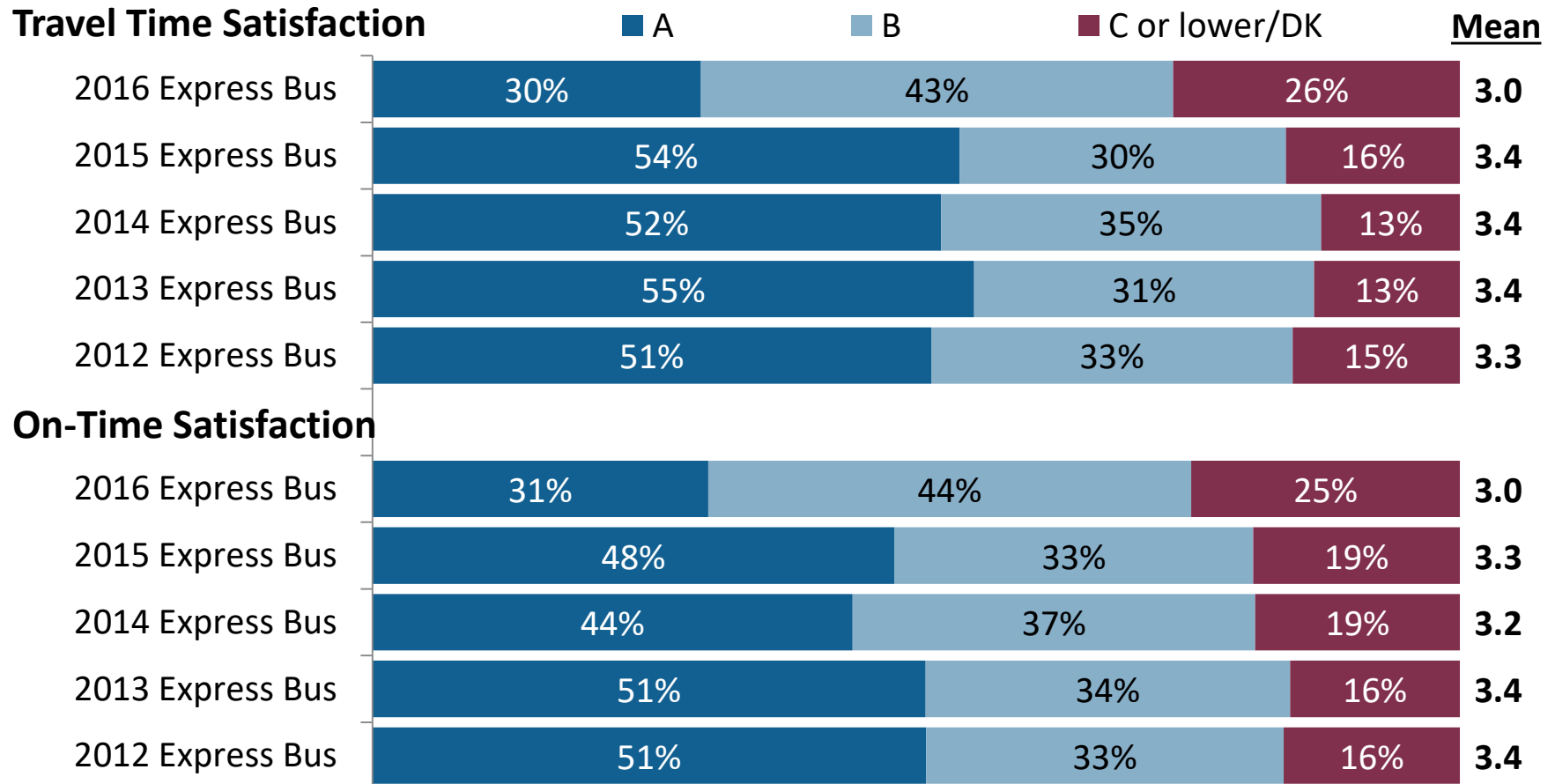


20. The total travel time it takes to get to your destination

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

Time Satisfaction – Express Bus Year-by-Year

There has been a marked decrease in satisfaction in express bus travel time and on-time performance.

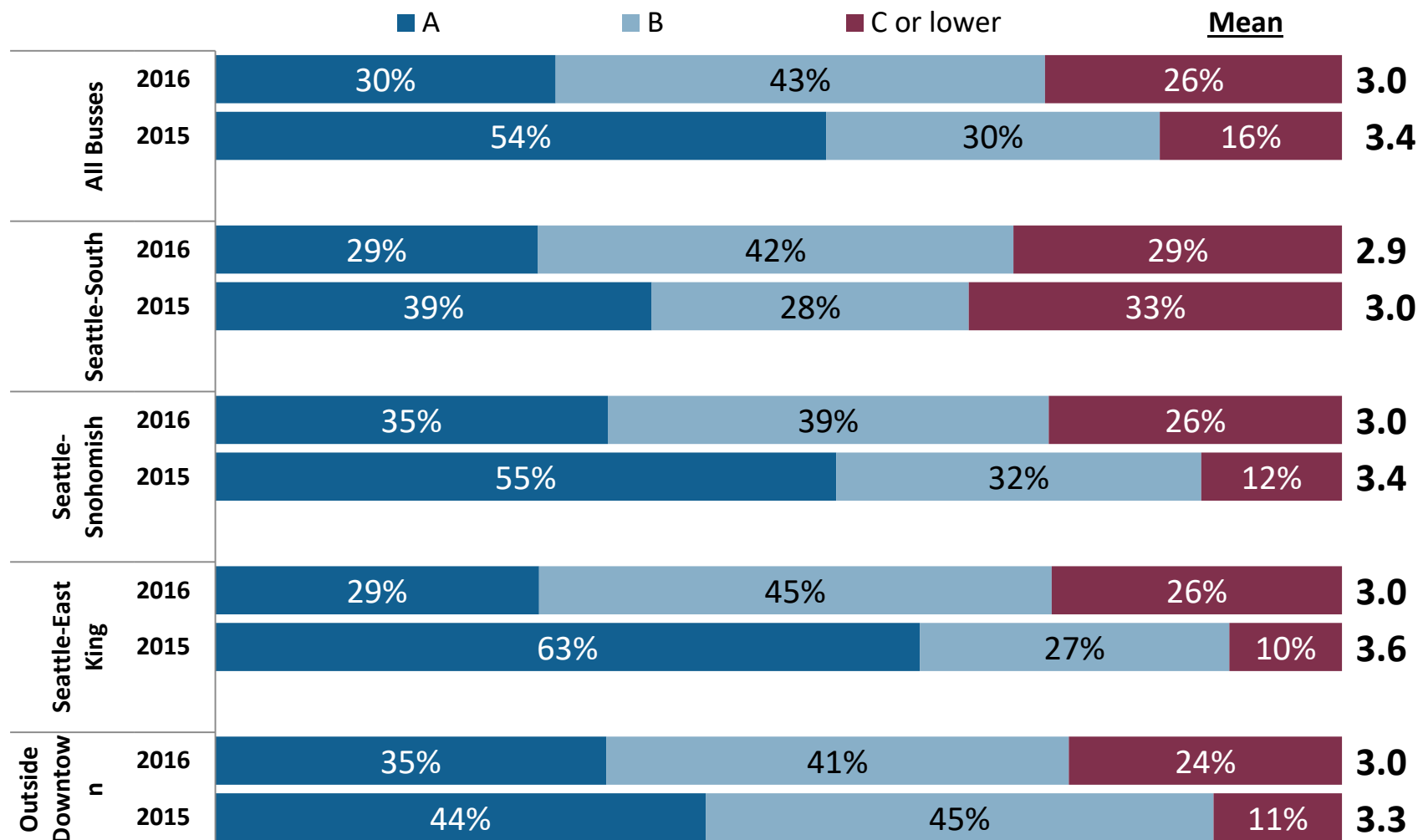


20. The total travel time it takes to get to your destination

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

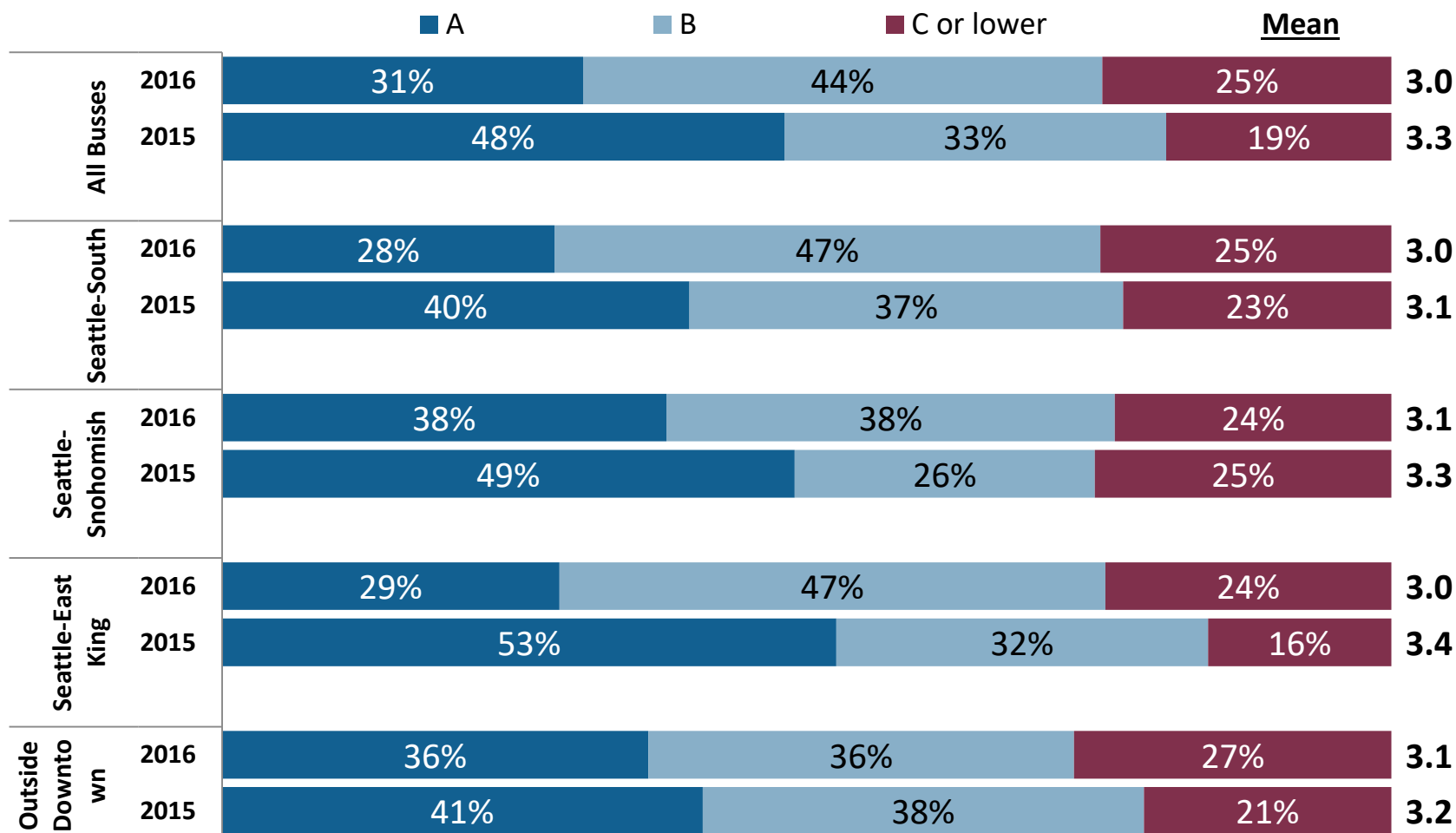
Travel Time Performance on Busses – Over Time and By Routes

Dissatisfaction with travel time has grown on all bus routes, but has dropped most markedly among riders on a busses that travel between Seattle and East King County.



On-Time Performance on Busses – Over Time and By Routes

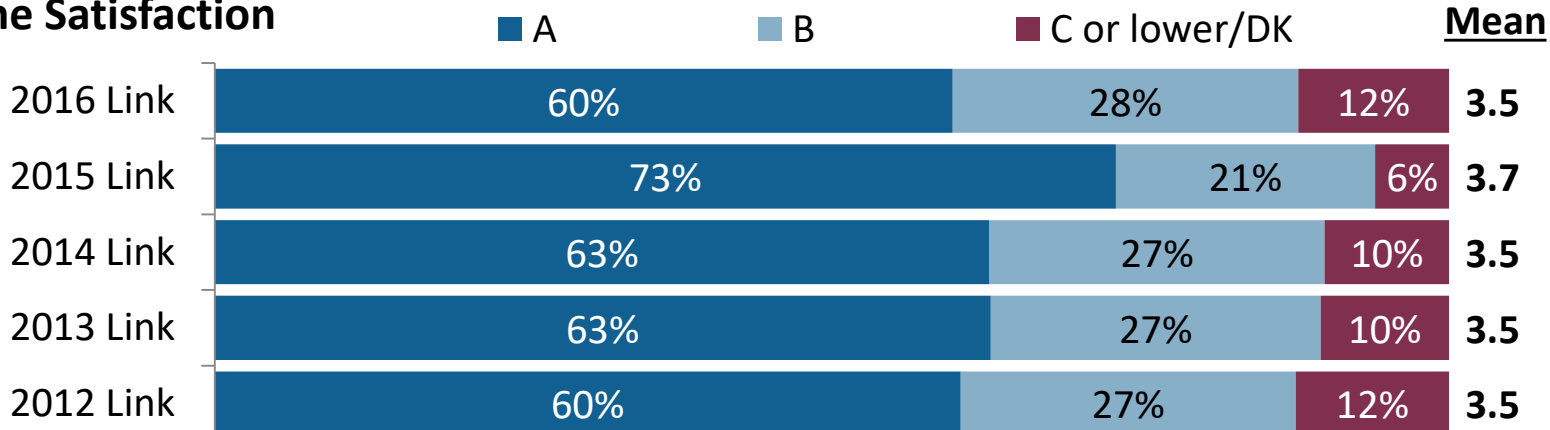
Satisfaction with on-time performance has also dropped across riders on all bus routes; albeit not as dramatically as it did for travel time. Satisfaction has dropped most markedly among riders on busses that travel between Seattle and East King County



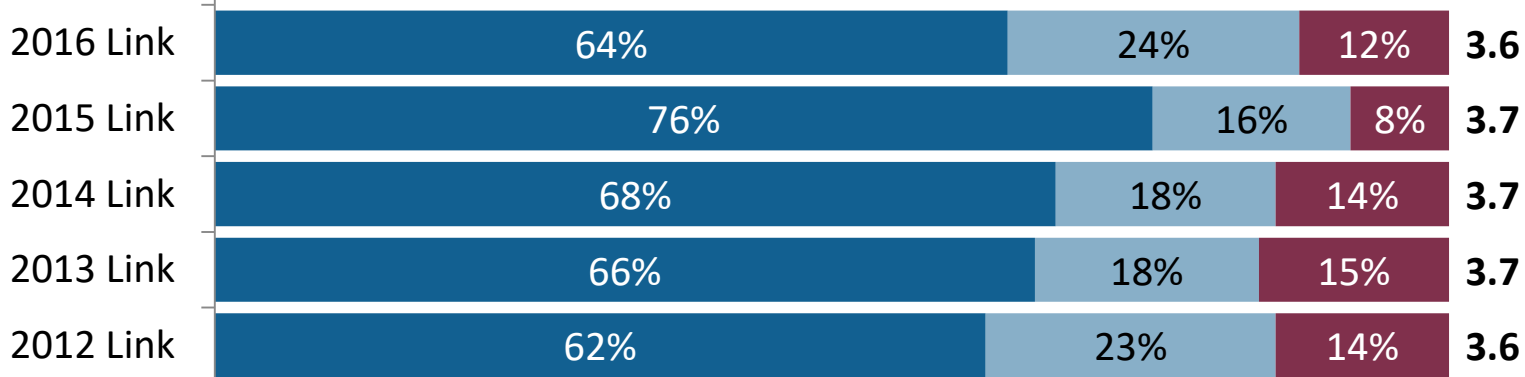
Time Satisfaction – Link Year-by-Year

While still relatively robust, the satisfaction with on time performance and total travel time among Link riders has softened slightly in the last year. However, it is comparable to years 2014 and earlier, indicating perhaps 2015 was an anomaly.

Travel Time Satisfaction



On-Time Satisfaction

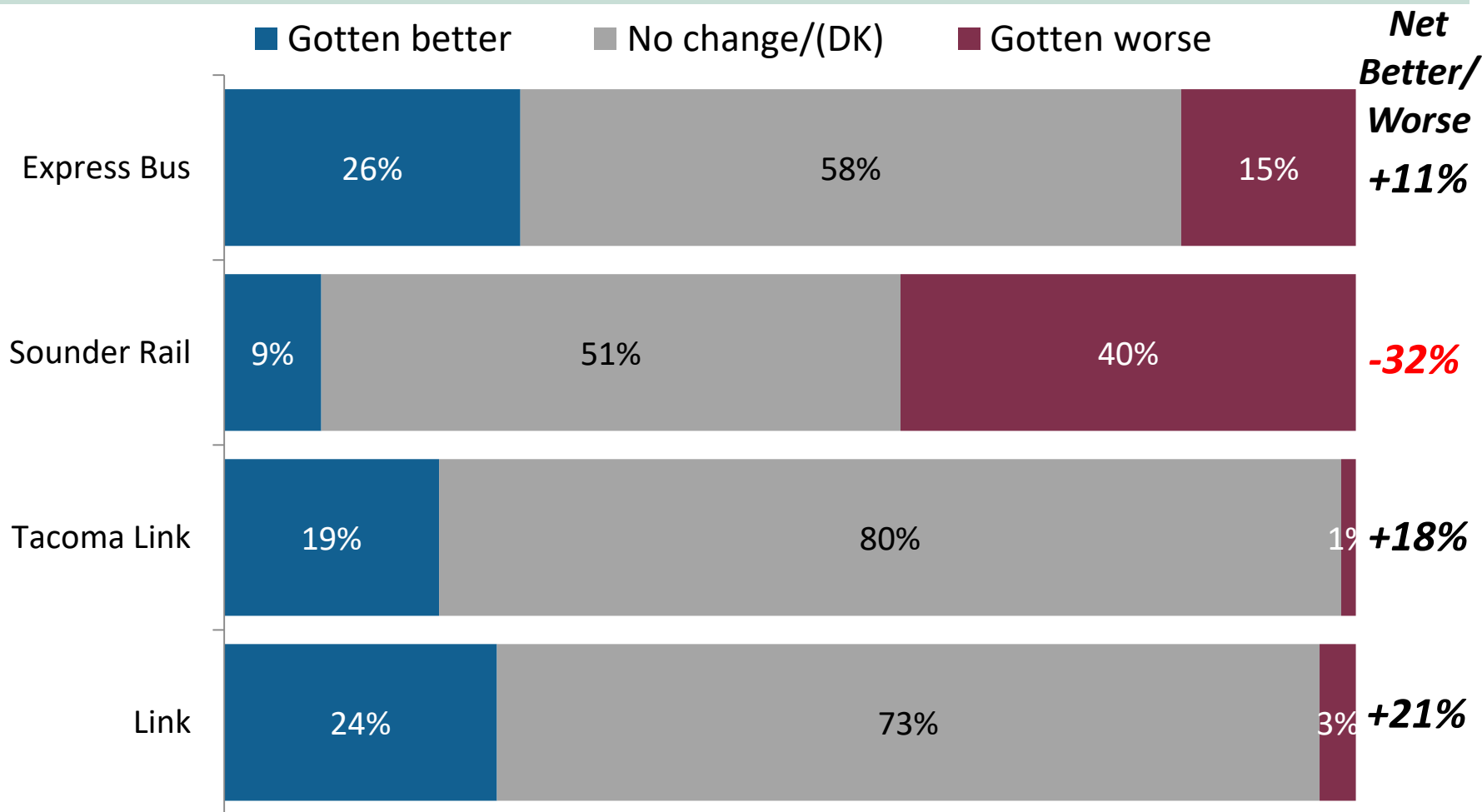


20. The total travel time it takes to get to your destination

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

Perceived Change in On-time Performance

Despite the fact that ratings for on-time performance have dropped in most services, when asked to reflect on the past year, most do not perceive a change, with the exception of Sounder riders, in which 40% report on-time performance being worse in the past year.



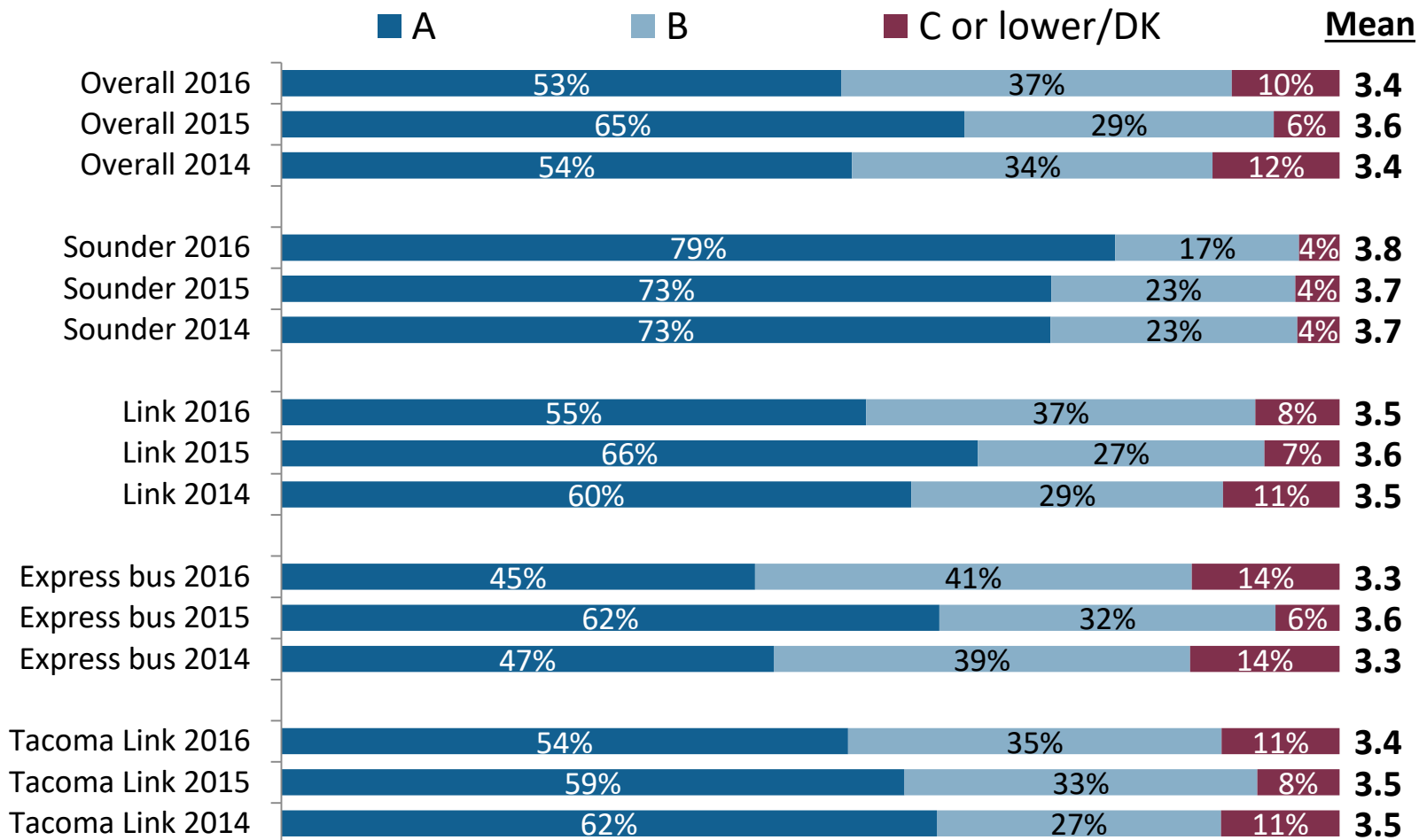
23. In the last year, would you say the on time performance of this (bus/Sounder/Link) has gotten better, gotten worse, or have you not noticed a change? (n=1465)



Performance Attribute Ratings and Grades: Cleanliness

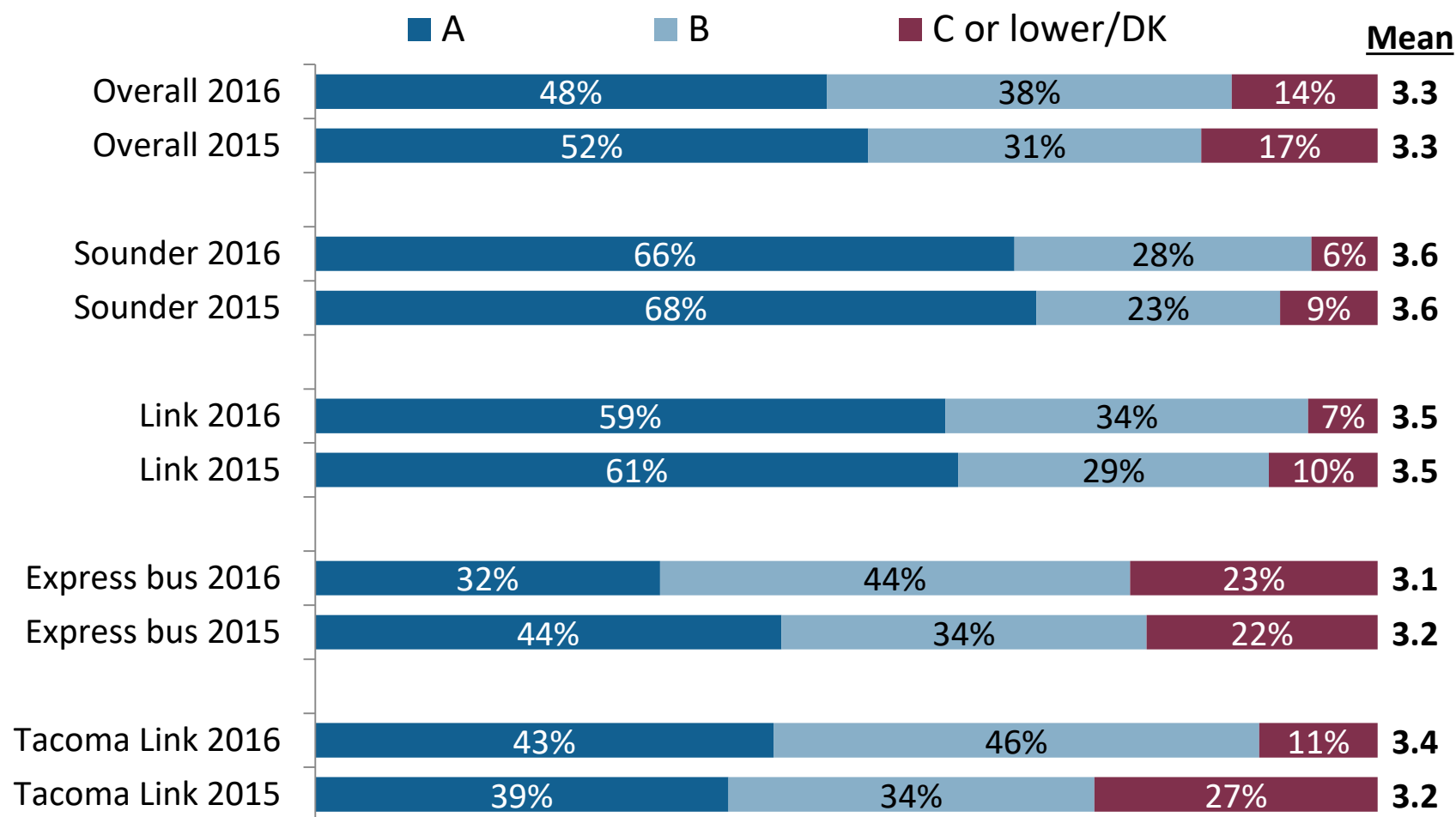
On-Board Cleanliness Rating

While there are drops in cleanliness ratings on most services from 2015, ratings are actually consistent with 2014 levels, indicating 2015 was an anomaly. The one exception is Tacoma Link, where ratings continue to drop.



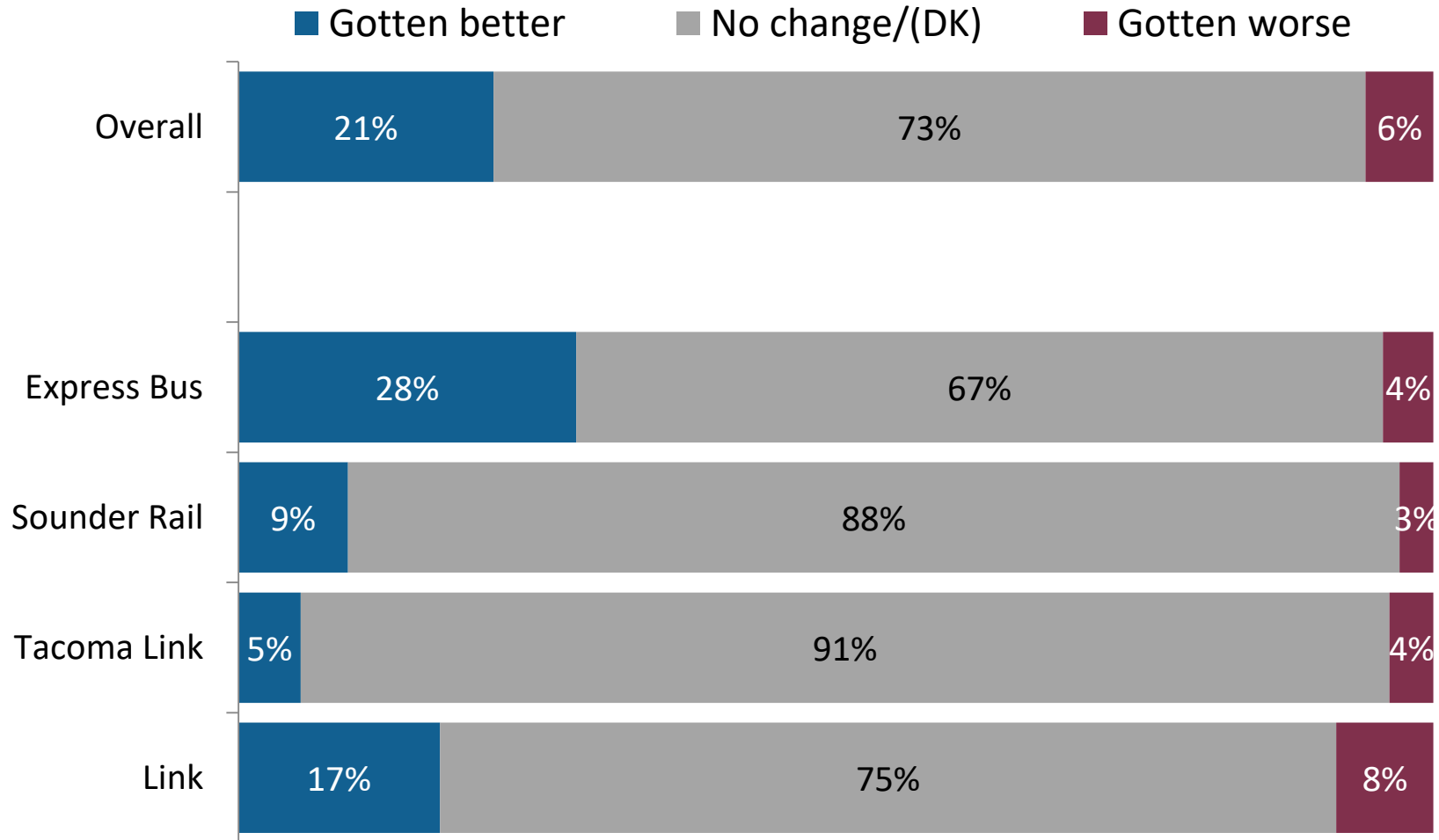
Transit Center/Station Cleanliness Rating

Ratings of cleanliness at stops and stations generally remain consistent with the exception of Express Bus riders, in which the A grade has softened substantially.



Change in Cleanliness by Service

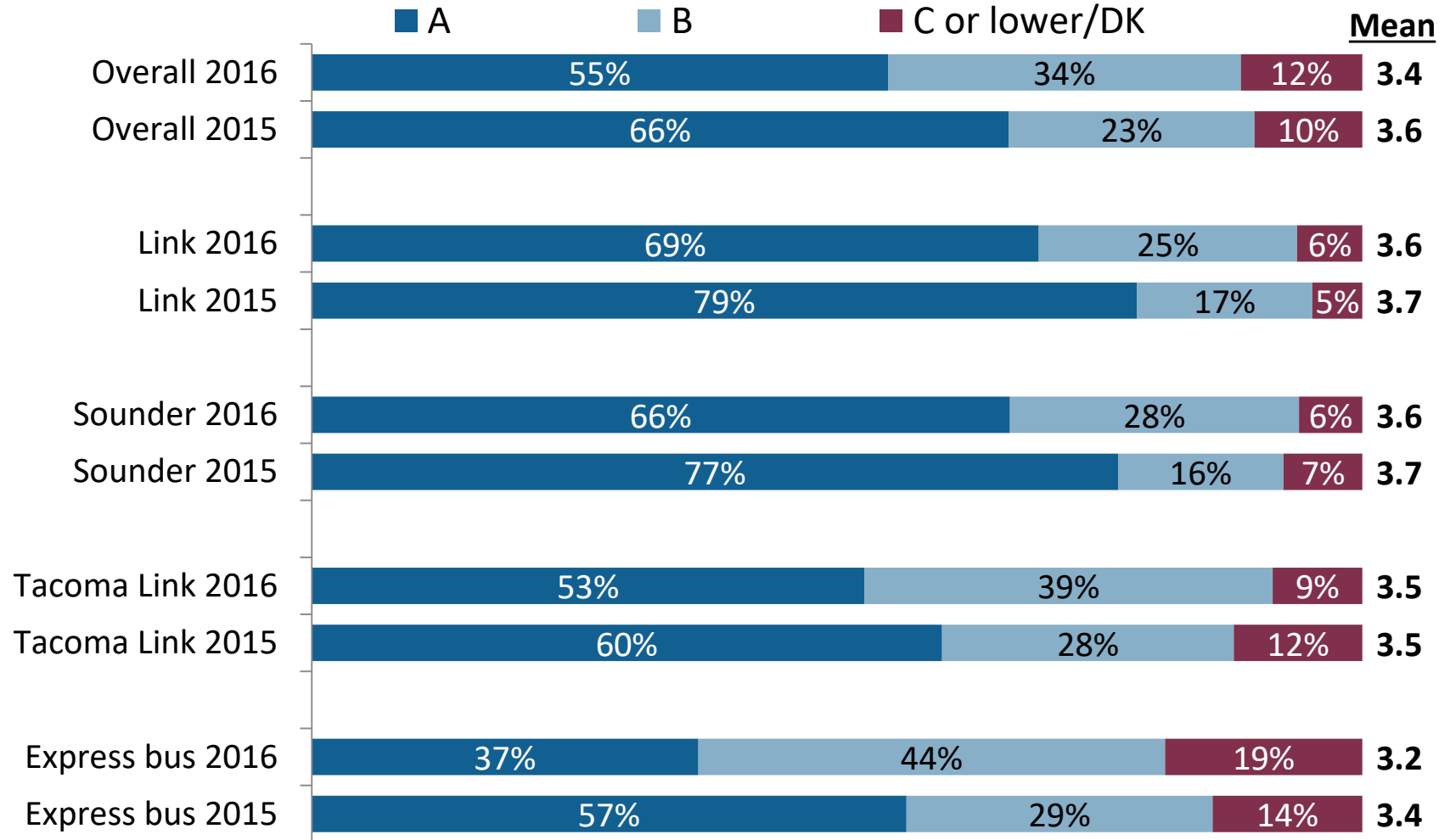
Most riders don't notice a change in cleanliness. Over a quarter of bus riders actually report cleanliness improving in the past year.



22. In the last year, would you say that the cleanliness of this (if q2=1, bus) vehicle/(if q2≠1) cabin has gotten better, gotten worse, or have you not noticed a change? (n=1465)

Physical Condition of Stops/Stations

There has been moderate softening in the grades of the physical condition of bus stops and train stations. The most marked drop is among bus riders.

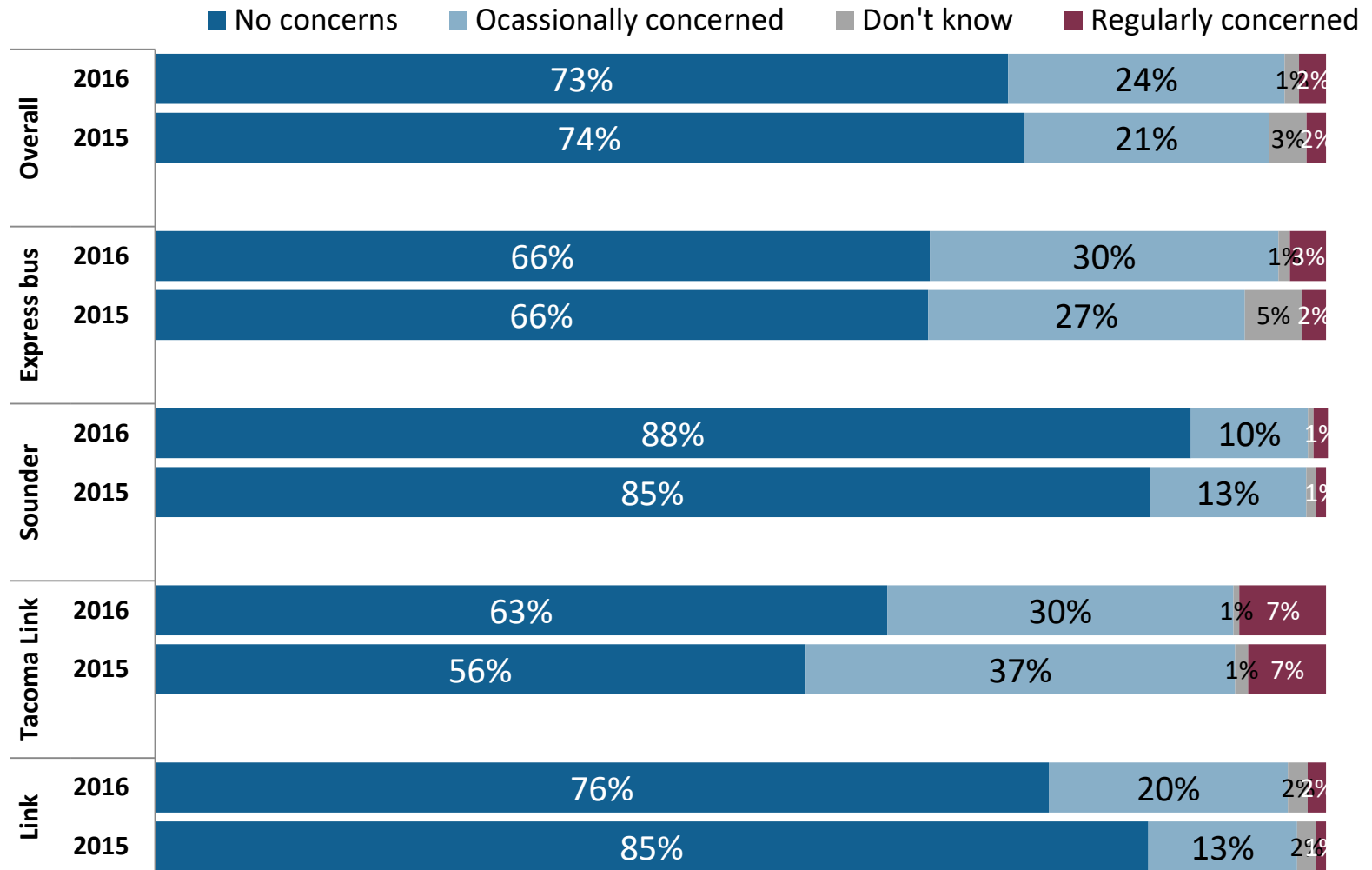




Performance Attribute Ratings and Grades: Safety

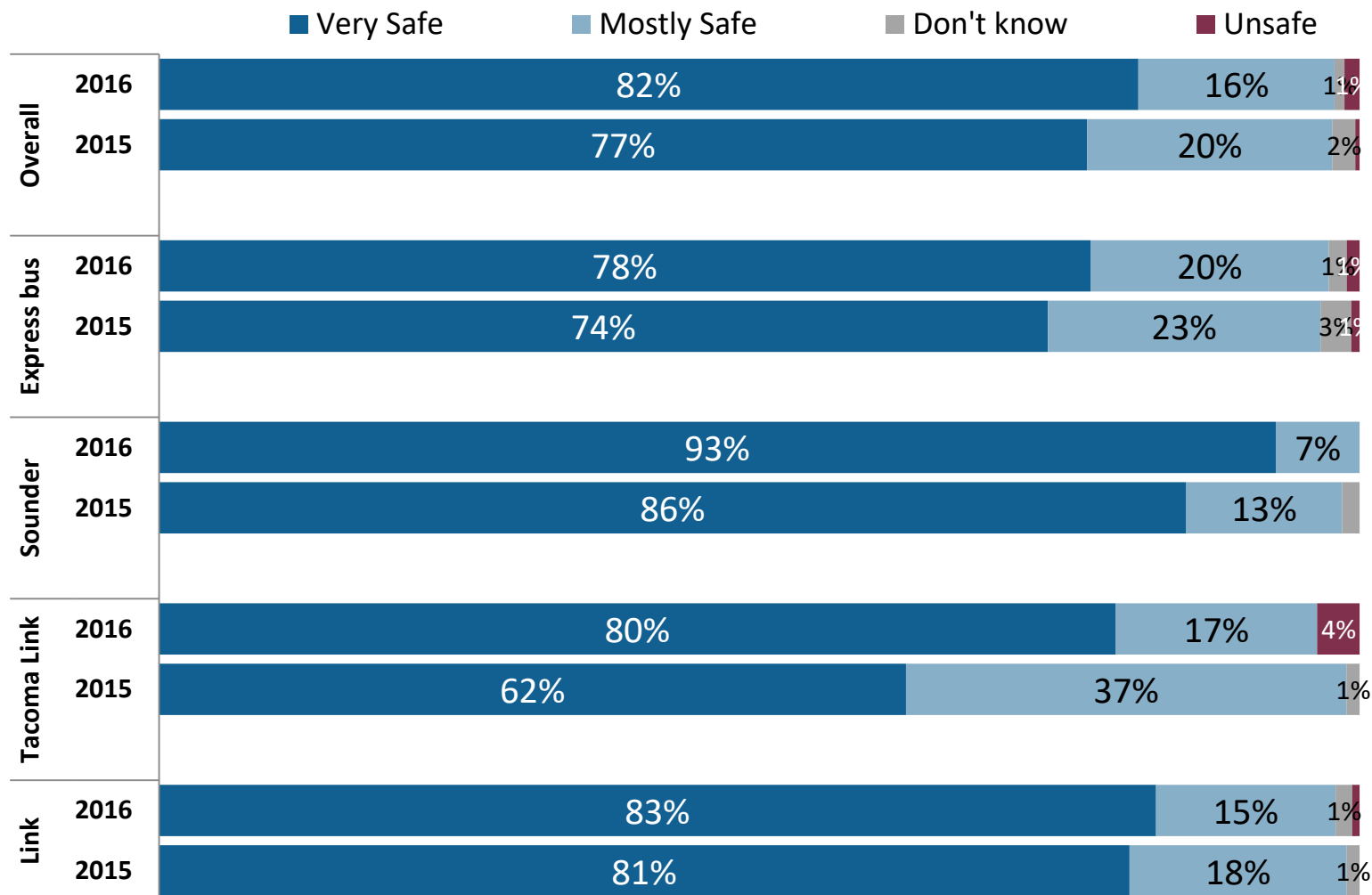
Safety at Stop/Station – by Service

Most riders feel safe while waiting for a train or bus. Most feel as safe or safer than they did a year ago, with the exception of Link riders.



Safety On-Board – by Service

Most riders feel safe while waiting for a train or bus. Most feel as safe or safer than they did a year ago, with the exception of Link riders.



Top-of-Mind Safety Issues

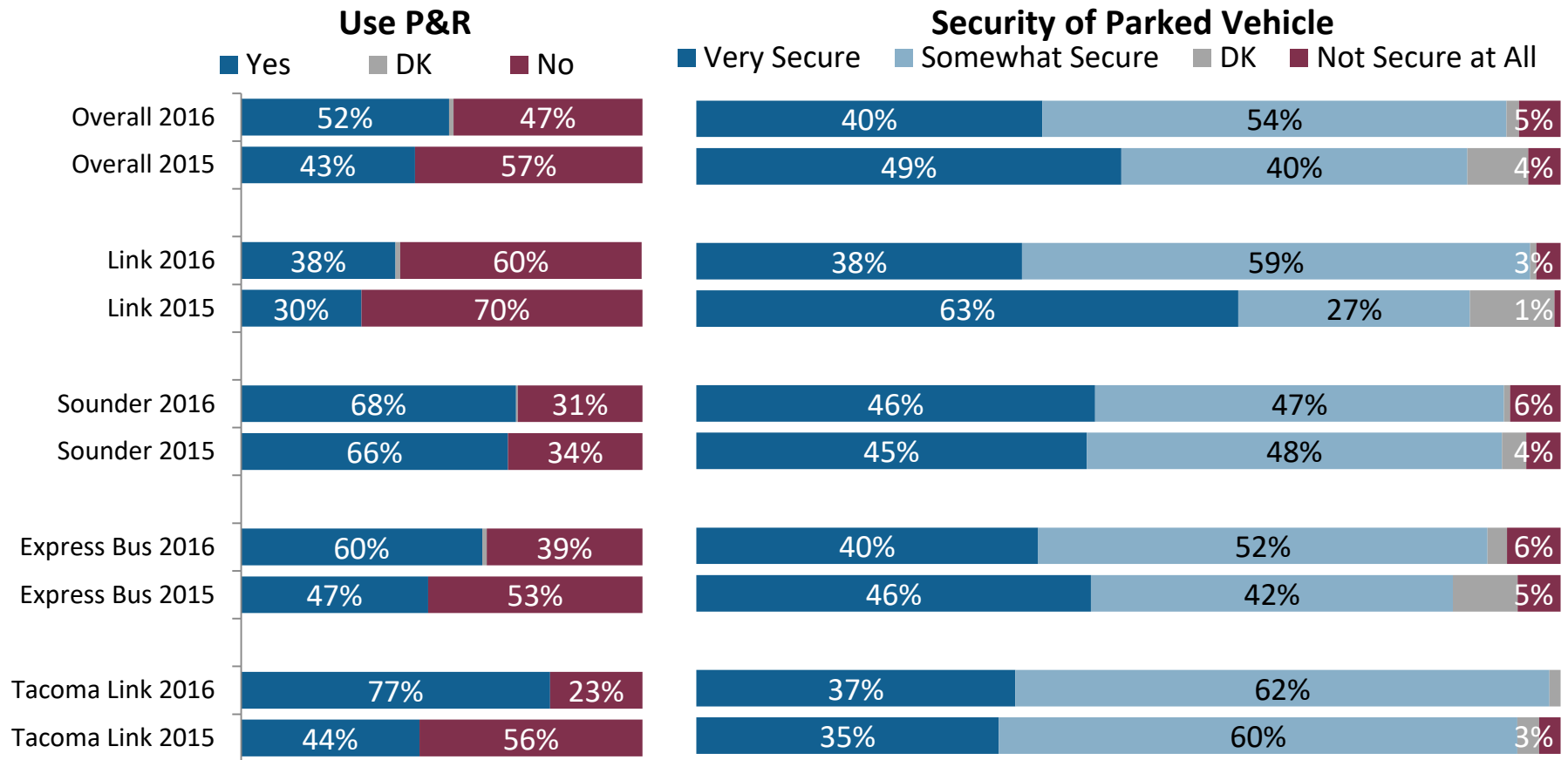
A plurality of riders on all services have no suggestions to improve safety. Overcrowding and erratic or scary behavior from other passengers are top concerns throughout the system.

Top Reasons	Overall	Express Bus	Sounder Seattle-Everett	Sounder Seattle-Lakewood	Tacoma Link	Central Link
Overcrowding	17%	17%	9%	29%	-	15%
Weird/threatening/scary passengers	16%	18%	4%	3%	28%	16%
People who are drunk or high	9%	12%	4%	4%	10%	8%
Angry or disruptive riders	5%	6%	3%	4%	5%	4%
Abrupt stops, jerky rides	4%	6%	2%	4%	-	2%
Panhandling or begging	3%	4%	2%	1%	3%	2%
Lack of lighting	1%	2%	2%	0%	3%	0%
Lack of security staff	1%	2%	-	1%	3%	1%
Unsafe parking lots/garages	1%	1%	1%	2%	-	0%
Inexperienced or unsafe drivers	0%	1%	1%	-	1%	-
Other	3%	2%	4%	4%	3%	3%
<i>No complaints/No suggestions</i>	<i>38%</i>	<i>26%</i>	<i>65%</i>	<i>48%</i>	<i>44%</i>	<i>47%</i>
Don't know	3%	4%	4%	1%	-	3%
Refused	0%	0%	-	-	-	0%

28. What safety issues have you noticed, either on-board or at stops or stations?

Vehicle Security at Park & Ride – By Service

Overall, usage of park and rides is up. The greatest increase among bus riders. Most feel their vehicle is safe, generally consistent with last year. There is a decrease among Link riders, but many of these riders may be new to the system.



29. Do you ever park your vehicle at a Sound Transit park and ride? (n=1,258)

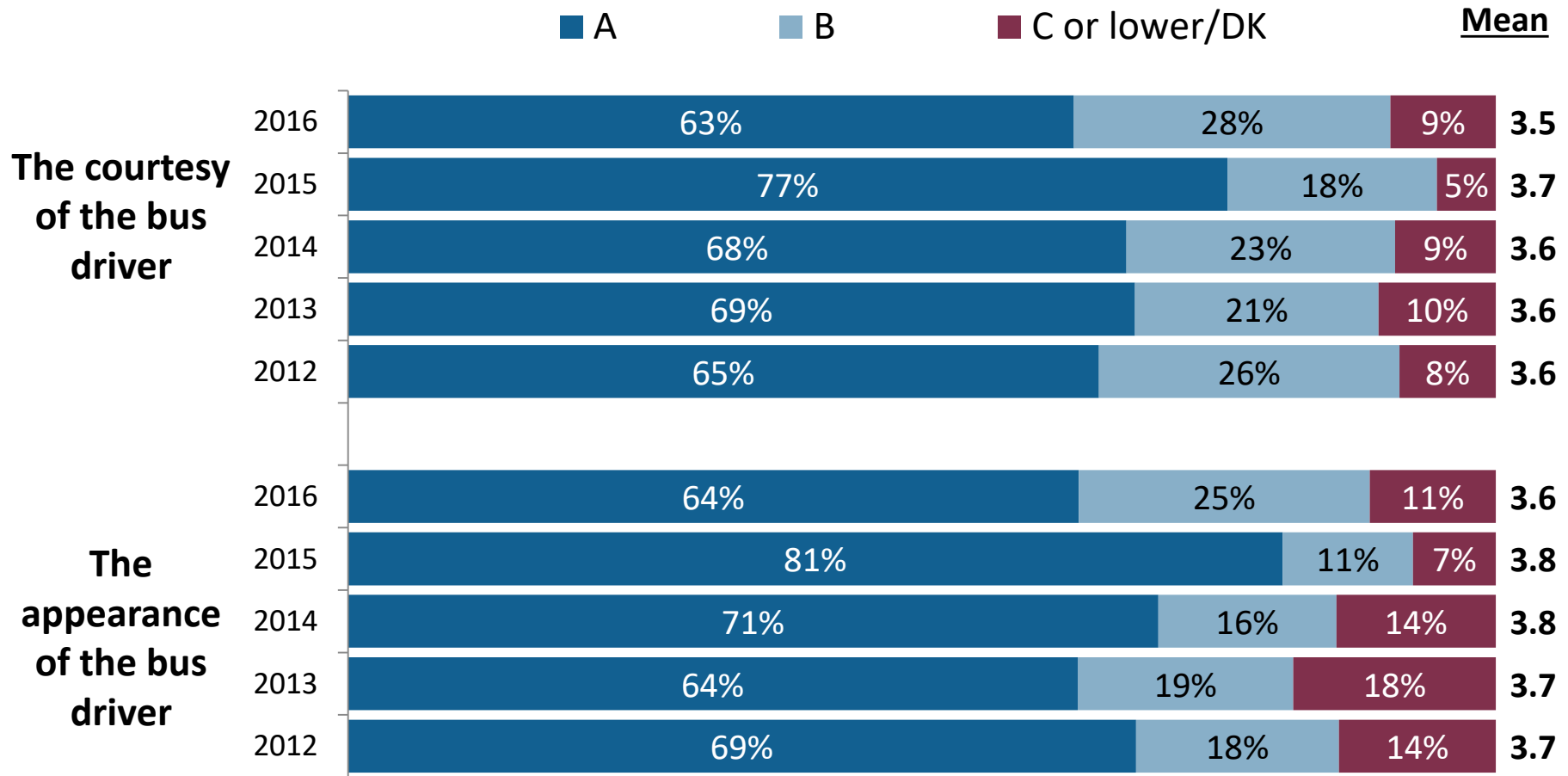
30. (Only asked if Yes in Q29) How secure do you feel your vehicle is when parked at a park and ride? Would you say very secure, somewhat secure, or not secure at all? (n=724)



Performance Attribute Ratings and Grades: Additional Attributes

Express Bus Operator Ratings

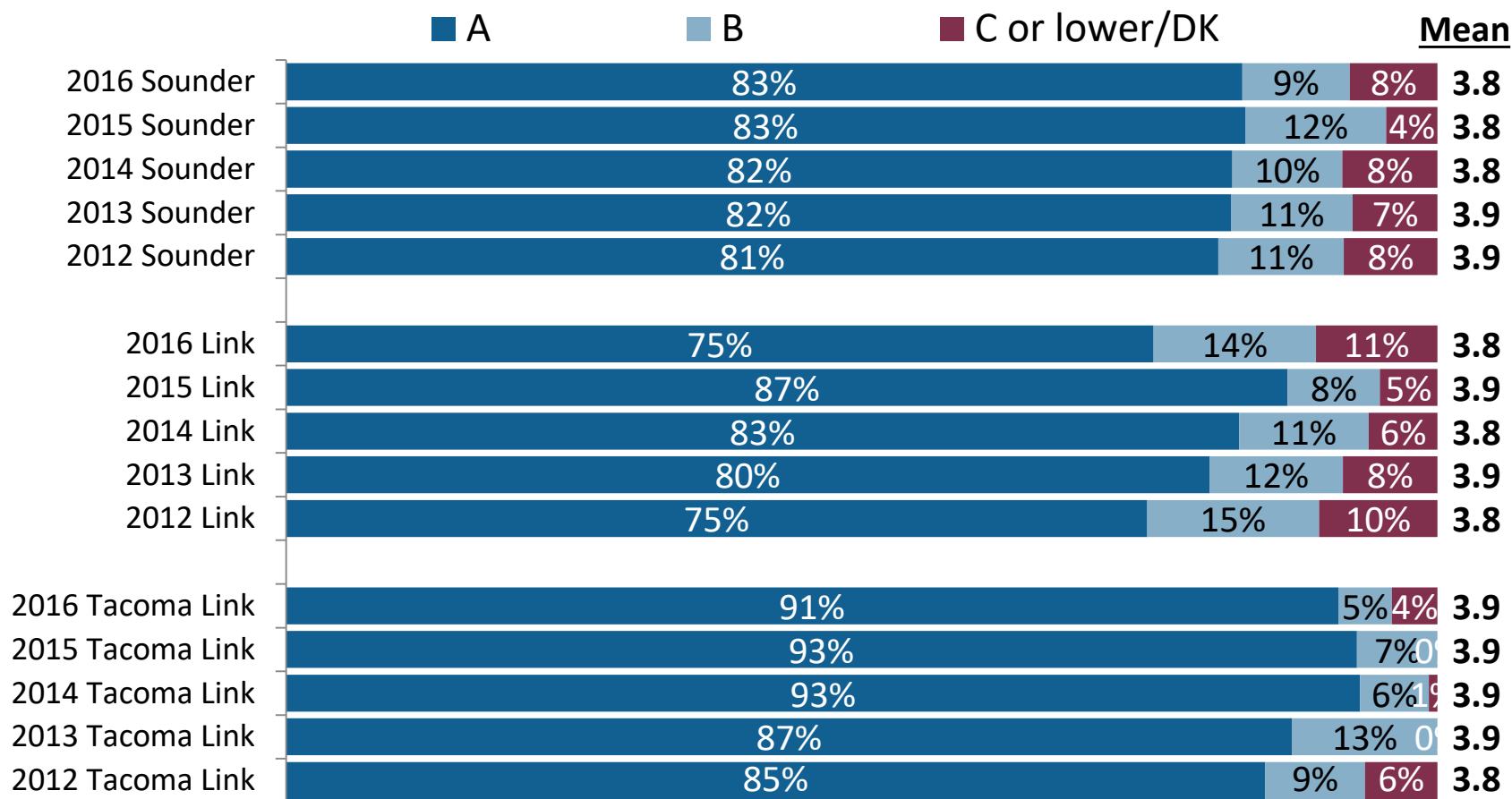
There has been a softening in the ratings bus riders give their driver's courtesy and appearance.



16. The courtesy of the bus driver
 17. The appearance of the bus drive
 (n=923)

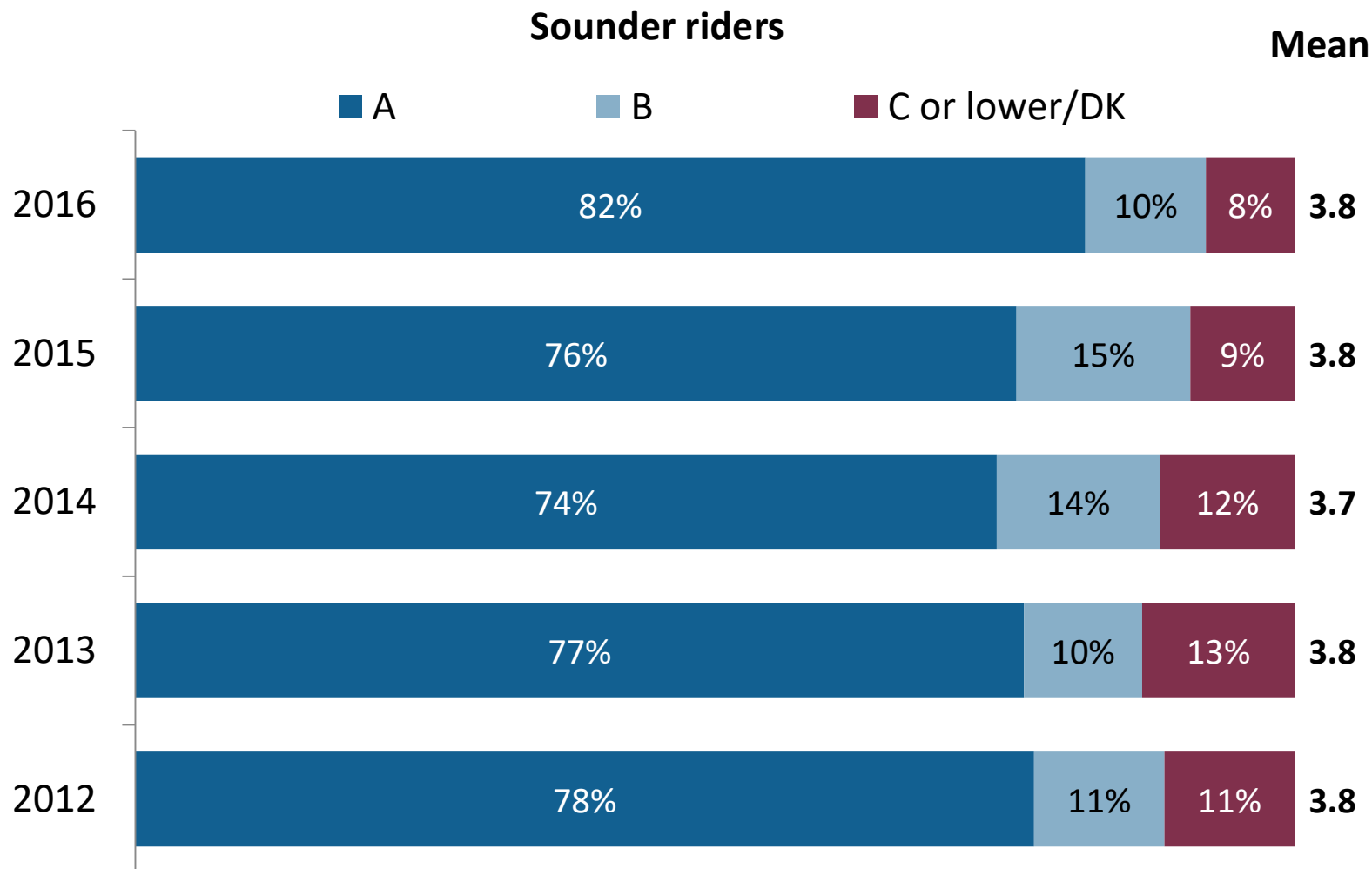
Train Conductor Rating

Sounder and Tacoma Link riders give their train conductors high grades, consistent with findings from 2015. Most link riders also give their conductor an A rating, but the number has dropped off slightly from 2015 levels.



Sounder Station Agents

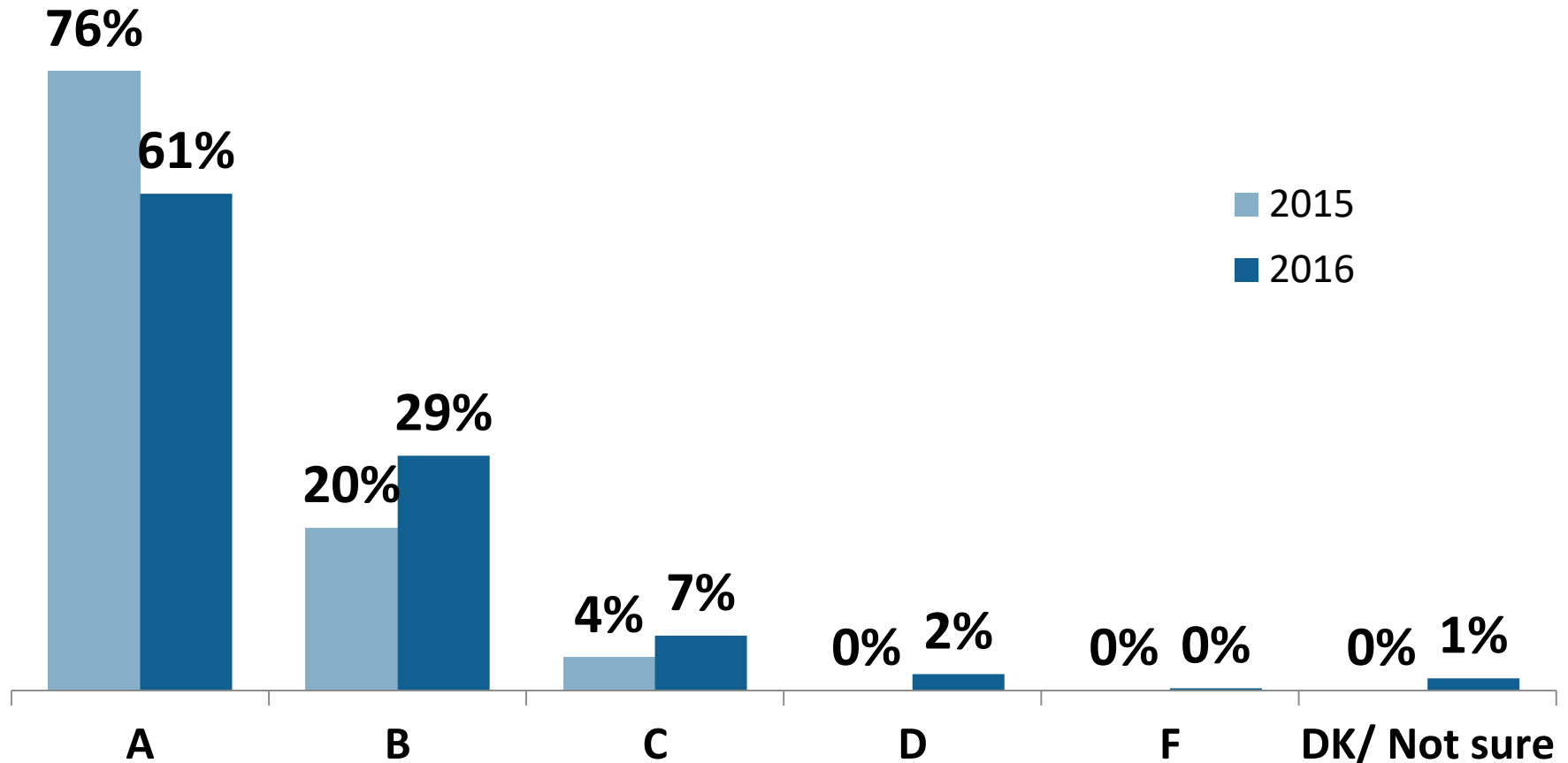
Sounder riders continue to give high ratings to the job station agents are doing.



Smoothness of the Ride – Link

While more than half of Link riders give the smoothness of the ride an A, this is down 15 points from 2015.

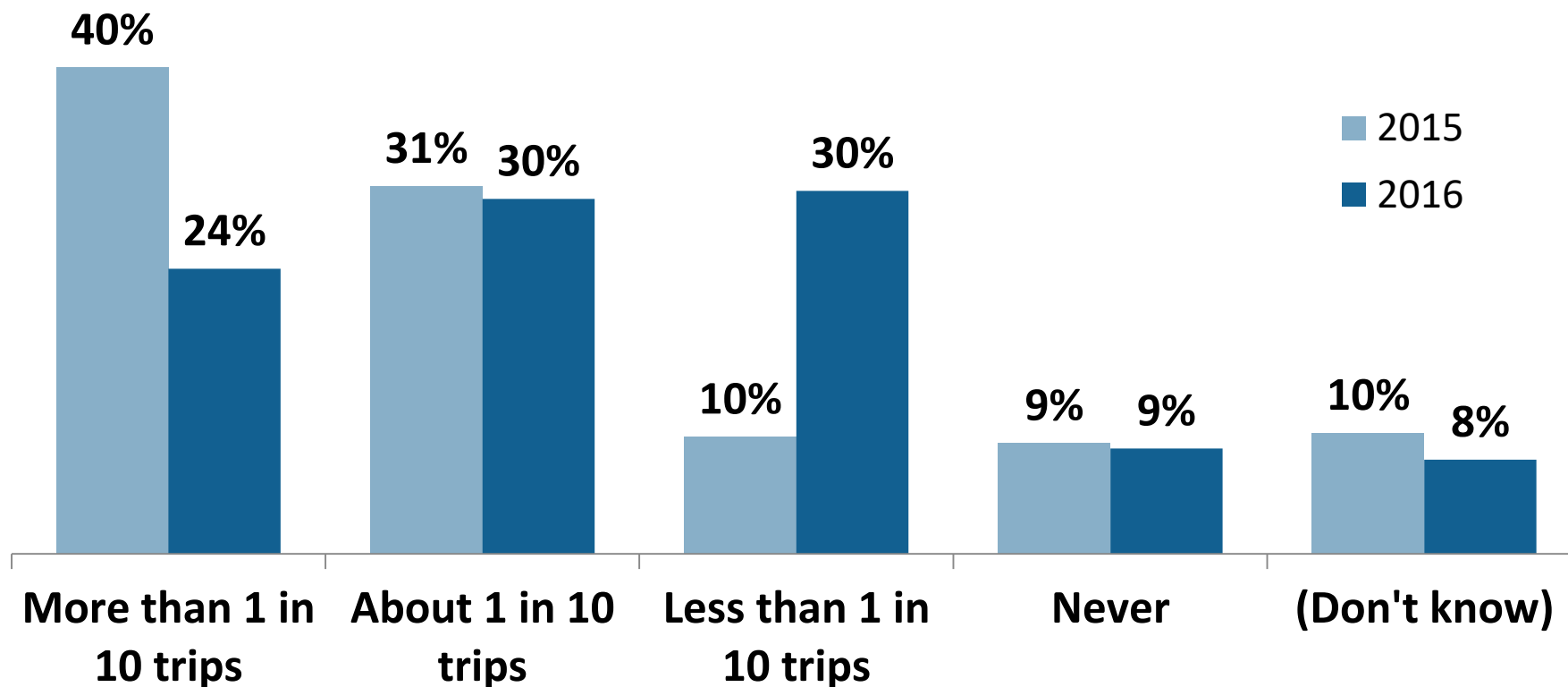
Link riders



Light Rail Fare Inspectors

Link riders are seeing far fewer fare inspectors than they reported seeing in 2015.

Link riders



25. 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=663)

Conclusions

- ▶ *A strong majority (89%) of riders give Sound Transit a positive rating of B or higher with two-in-five (42%) giving the agency an A grade. Overall positive (B or higher) grades remain on-par with ratings from previous years but the portion of riders giving ST an A grade has declined (from 48% in 2015 to 42% in 2016).*
- ▶ *The drop in A grades is being driven predominately by bus riders, although there are declines in all services.*
- ▶ *Travel time and on-time performance appear to be a sore point for many across the system. This is even more true among bus riders.*
- ▶ *Despite growing issues with on-time performance and travel times, reliability and convenience are still strengths for the agency. Riders like what the agency provides, they just want more of it.*
- ▶ *Sound Transit provides a safe system, with high safety ratings onboard, at stops and stations, and at park and rides.*
- ▶ *Many make the deliberate choice to ride Sound Transit, not out of necessity.*

Contacts



Brian Vines

brian@emcresearch.com

206.652.2454 Ext. 4

Ian Stewart

ian@emcresearch.com

206.652.2654 Ext. 2

