



# 2015 Sound Transit Customer Satisfaction Survey Results

**DRAFT REPORT**

EMC #15-5748



# Methodology

- ▶ These results are the 2015 measurements for Sound Transit customer satisfaction. Where possible, results are compared to previous surveys conducted in 2006 – 2014.
- ▶ A total of 1,322 interviews were conducted system-wide between November 17<sup>th</sup> and December 21<sup>st</sup> 2015 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
<b>Express Bus: (n=562)</b>	79%	78%	78%	63%	56%	57%	55%	55%	54%	52%
<b>Central Link: (n=291)</b>	-	-	-	22%	28%	29%	31%	32%	34%	33%
<b>Sounder: (n=379)</b>	14%	15%	16%	11%	12%	11%	10%	10%	10%	12%
<b>Tacoma Link: (n=90)</b>	7%	7%	6%	4%	4%	4%	4%	3%	3%	3%

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

# Rider Demographics – Gender and Age

	Overall	Express Bus	Sounder South	Sounder North	Central Link	Tacoma Link
Male	55%	54%	48%	49%	59%	44%
Female	43%	44%	50%	51%	38%	56%
(Unknown /Other)	0%	0%	-	-	-	-
No answer	2%	2%	2%	-	3%	-
<25	20%	21%	9%	12%	20%	23%
25-34	29%	31%	22%	13%	29%	26%
35-44	22%	19%	26%	22%	24%	23%
45-59	19%	18%	30%	33%	15%	24%
60+	10%	9%	11%	18%	10%	3%
Refused	1%	1%	1%	2%	2%	-

# Rider Demographics - Ethnicity

	Overall	Express Bus	Sounder South	Sounder North	Central Link	Tacoma Link
White/Caucasian	63%	62%	75%	80%	62%	61%
Black/ Afr. American	14%	12%	9%	10%	20%	9%
Asian	10%	12%	6%	3%	8%	7%
Native Hawaiian/ Pacific Islander	1%	1%	2%	1%	0%	1%
American Indian/ Alaska Native	1%	-	-	2%	1%	7%
Hispanic/ Latino	4%	4%	3%	2%	2%	6%
Multiple races	4%	4%	3%	-	4%	7%
Other	1%	1%	0%	1%	0%	1%
No answer	3%	4%	2%	3%	2%	2%

# Rider Demographics – Home Geography

	Overall	Express Bus	Sounder South	Sounder North	Central Link	Tacoma Link
Snohomish	10%	18%	5%	45%	-	1%
KC Seattle/North	32%	23%	8%	9%	56%	2%
KC East	17%	30%	2%	-	2%	-
KC South	15%	10%	37%	4%	17%	4%
Pierce	14%	13%	41%	19%	2%	87%
Other	9%	3%	5%	21%	20%	4%
Refused	3%	3%	2%	2%	2%	1%

# Rider Demographics – Employment Status

	Overall	Express Bus	Sounder South	Sounder North	Central Link	Tacoma Link
Employed 30+ hrs/wk	65%	65%	81%	73%	63%	47%
Employed <30 hrs/wk	7%	8%	2%	4%	7%	14%
Self-employed	3%	4%	0%	6%	4%	4%
Retired	5%	5%	1%	3%	7%	3%
Homemaker	1%	1%	0%	1%	-	1%
Student	11%	13%	8%	4%	10%	20%
Looking for work	1%	1%	0%	-	1%	1%
Other	2%	1%	-	-	2%	8%
No answer	5%	3%	7%	8%	7%	1%

# Rider Demographics – Annual Household Income

	Overall	Express Bus	Sounder South	Sounder North	Central Link	Tacoma Link
< \$30,000	16%	16%	8%	8%	18%	39%
\$30,000 - \$49,999	20%	21%	12%	14%	21%	19%
\$50,000 - \$74,999	19%	17%	23%	20%	20%	9%
\$75,000 - \$99,999	8%	8%	14%	15%	8%	4%
\$100,000 - \$149,999	7%	7%	12%	11%	5%	6%
\$150,000 - \$199,999	3%	3%	5%	6%	4%	-
\$200,000+	2%	2%	3%	2%	2%	2%
Refused	22%	26%	19%	18%	17%	17%
No answer	2%	1%	3%	6%	5%	4%

# Key Findings

---

***A strong majority (89%) of riders give Sound Transit a positive rating of B or higher with nearly half (48%) giving the agency an A grade. Average Sounder Southline grades have dropped slightly while GPAs for the rest of Sound Transit's services have stayed on-par with previous years.***

- *South Sounder riders' ST grades have declined since last year (43% → 35% A grade); this is the only service with a significant drop in agency satisfaction ratings.*
- *Among Southline riders, ST ratings have continued to decline over the last three years, resulting in a 18 point drop since 2012.*
- *Express Bus riders ratings have improved slightly, with a near-majority giving ST an A grade. Most (88%) give Sound Transit a B or higher.*
- *Ratings among Central Link, North Sounder and Tacoma link remain largely unchanged from 2014.*
- *Central Link riders continue to be satisfied with Sound Transit; a majority (56%) give the agency an A grade while under a tenth (8%) rate it a C or lower.*
- *Overall, Sound Transit continues to enjoy some of the highest ratings among transit agencies.*



# Key Findings

---

***ST riders cite service reliability/promptness and convenience as the agency's biggest strengths and recommend on-time improvements and overcrowding as possible improvements.***

- *In addition to a third (32%) of general/broad positive mentions, service reliability (19%) is the top specific reason for giving Sound Transit an A grade. Convenience (10%) and traffic avoidance (7%) follow.*
- *Lateness (23% mentioned) and overcrowding (10%) are riders' top reasons for giving ST a C grade or lower.*

***System investments – particularly more frequent buses/trains– make up the bulk of top-of-mind service improvements for Sounder and Express bus riders. Better on-time performance and communicating delays/cancellations are also common performance improvement suggestions among Sounder riders.***

- *Improving on-time performance (9-12% mentioned) is the most common specific suggestion among Express bus and Sounder riders.*
- *Several riders on both Sounder lines suggest better communications about delays and problems (4-5% mention).*
- *Increasing the number of buses/trains and running more often was the top system improvement priority among Sounder and Express bus riders.*

# Key Findings

---

***On-time performance ratings have dropped significantly among Sounder South riders while trip time ratings have also declined among Sounder North riders. Time satisfaction has held steady among Express bus and Link riders.***

- *Among Southline Sounder riders, travel time satisfaction dropped slightly (72 → 68% A) while on-time performance declined significantly (63 → 47%), continuing a relatively volatile trend over the last few years.*
- *For Northline Sounder riders, trip time satisfaction has declined from 2015 (77 → 70% A) while on-time satisfaction has remained similar.*
- *While most riders have not noticed a change in on-time performance, over twice as many Sounder riders think OTP has gotten worse than better since last year.*
- *Driven primarily by steady ratings from Express bus and Link riders, overall travel time ratings have improved slightly from previous years; a majority (63%) of overall riders gave these attributes an A grade. On-time satisfaction, while mostly consistent, has also increased slightly from 2014 (55 → 58% A grade).*
- *Express bus riders rate travel time (54% A grade) and on-time performance (48%) the lowest of ST's services. While the rail services have traditionally performed better on time satisfaction, Sounder riders OTP a comparably low satisfaction rating (49% A) in 2015.*
- *Travel time and on-time satisfaction ratings rebounded slightly for Express bus riders in 2015.*
- *Travel time (63% → 73% A) and on-time performance (68 → 76%) have both increased significantly among Central Link riders, with about three quarters of Link riders rating these attributes as an A.*

# Key Findings

---

***Overall ST safety ratings have mostly improved or held steady with previous years. Safety ratings are lower among Tacoma Link and Express bus rider than other services.***

- *While a majority of riders have no safety concerns while waiting at stops/stations, about a third (37%) of Tacoma Link riders and a quarter (27%) of Express bus riders express concerns at least occasionally. A few Tacoma Link riders (7%) are regularly concerned for their safety.*
- *Most riders feel very safe while on-board ST's services, though these rates are lower among the quarter (23%) of Express bus and third (37%) of Tacoma Link riders who feel it is mostly safe.*
- *Link safety ratings – both on-board and at the station – spiked in 2015 from previous years.*
- *For Express bus riders, stop/station safety ratings have declined slightly from previous years while on-board safety ratings have rebounded from a dip in 2014.*
- *Express bus safety ratings are generally high throughout the service area, though these ratings are slightly lower among riders on routes connecting Downtown and South King or Pierce.*
- *By geography, North King and Snohomish riders are most likely to feel that their vehicle is 'very safe' at a P&R. This sentiment is lower among riders in Pierce, South King and East King counties.*
- *While a strong majority of riders cite no top-of-mind safety issues, others are predominantly concerned with other passengers' behavior, particularly on Tacoma Link and Express bus.*

# Key Findings

---

***Sound Transit's on-board cleanliness ratings have improved significantly since 2014 (54 → 65% A grade).***

- *This increase is primarily driven by improved ratings among Express bus (+15% A) and Central Link (+6%) riders, with Sounder and Tacoma Link remaining consistent.*
- *Station and transit center cleanliness ratings vary significantly by service. Tacoma Link and Express bus riders rate it the lowest, with over a fifth (22%+) rating transit center cleanliness below a B. A majority of Sounder (68%) and Central Link (61%) riders give TC/station cleanliness an A grade.*
- *Trash/garbage left behind on buses and Link -- and at stops and stations -- is the most common suggestion for improving cleanliness. Additionally, a handful of Tacoma Link riders cite odor/smells.*

***Compared to other areas, Express bus routes operating between Downtown Seattle and South King/Pierce perform lower on several rider satisfaction attributes, including on-board and station cleanliness, total travel time and on-time performance.***

- *Time satisfaction ratings are lowest for Express bus riders on routes running between Seattle and South King/Pierce routes and those that do not connect to Downtown Seattle. Routes running in East and North King/Snohomish receive the highest travel time and OTP grades.*
- *Express bus safety ratings are generally high throughout the service area, though these ratings are slightly lower among riders on routes connecting Downtown and South King or Pierce.*

# Key Findings

---

***Other ST service attribute ratings are widely positive and consistent with previous years.***

- *Satisfaction ratings for the courtesy and appearance of Express bus operators are the highest they've been in recent years, with over three-quarters of riders (77%+) giving each an A grade.*
- *Driver courtesy ratings do not vary significantly by ethnicity. At least three quarters (75%-80%) of riders give bus drivers an A for courtesy.*
- *Satisfaction with operators across all rail services remains high and consistent with previous years. Grades for Central Link operators have steadily increased since 2012.*
- *Most riders give Station Agents an A grade, which is consistent with previous years.*
- *A strong majority (71%) of passengers report seeing a fare inspector on at least 1 in 10 trips.*
- *Most ST riders believe the signs posted at stops and signs are at least somewhat helpful. Intensity is highest among Express bus riders, where a near-majority (48%) say the signs are 'very helpful.'*
- *Most Central Link Light rail riders find the public announcements at the station to be helpful. This portion is higher in 2015 than it has been in other years.*

# Key Findings

---

***Sound Transit continues to appeal to riders who ride frequently, use the service for commute trips and are drawn to the convenience of the service.***

- *On average, Sounder South riders use ST the most frequently of all services (4.2 days/week). Central Link has the least-frequent ridership (3 days/week).*
- *Sounder riders almost exclusively use it for work commute trips. Nearly a third (29%) of Central Link riders use Link to go to the airport and about a quarter of Tacoma Link riders make school trips.*
- *Convenience/ease of reaching destination is the top factor convincing riders to ride ST, followed by job/situation changes, cost and lacking a car.*
- *Express bus and Link riders are more likely to rely on the service because it's cheaper or they have no car. Sounder riders are primarily drawn to ST because it is fast/avoids traffic and convenient.*

***There is comparably high demand for various tech amenities among ST riders, systemwide.***

- *Being able to access real-time transit info and updates – either via mobile or at stops/stations - is the most important amenity to Express bus riders.*
- *A majority of Central Link light rail riders prioritize every tech amenity tested except for real-time parking availability.*
- *Sounder riders place an equally high priority on real-time transit info (on mobile and at stations) and wireless coverage at stations.*

# Key Findings

---

***Sounder and Express bus largely use ST as a matter of preference while a majority of Link riders consider it a necessity. Among Choice riders, nearly all of them intend to continue using ST themselves and would recommend the service to close friends and family members.***

- *Most Choice riders own a car and have chosen not to use it for their commutes.*
- *Virtually all ST Choice riders plan to continue to ride ST. These proportions are highest among Sounder riders.*
- *Nearly all of Choice riders would recommend ST's service to a friend or family member.*
- *Among Choice riders, more frequent service and expanded parking make up the largest improvement suggestions across all services. Requests for these items are highest among Sounder riders.*
- *Among Choice riders, ST ad recall is the lowest it's been since 2012.*
- *The impact of advertising remains consistent with years past. A strong majority think advertising plays at least a minor role in others' decision to start riding transit.*

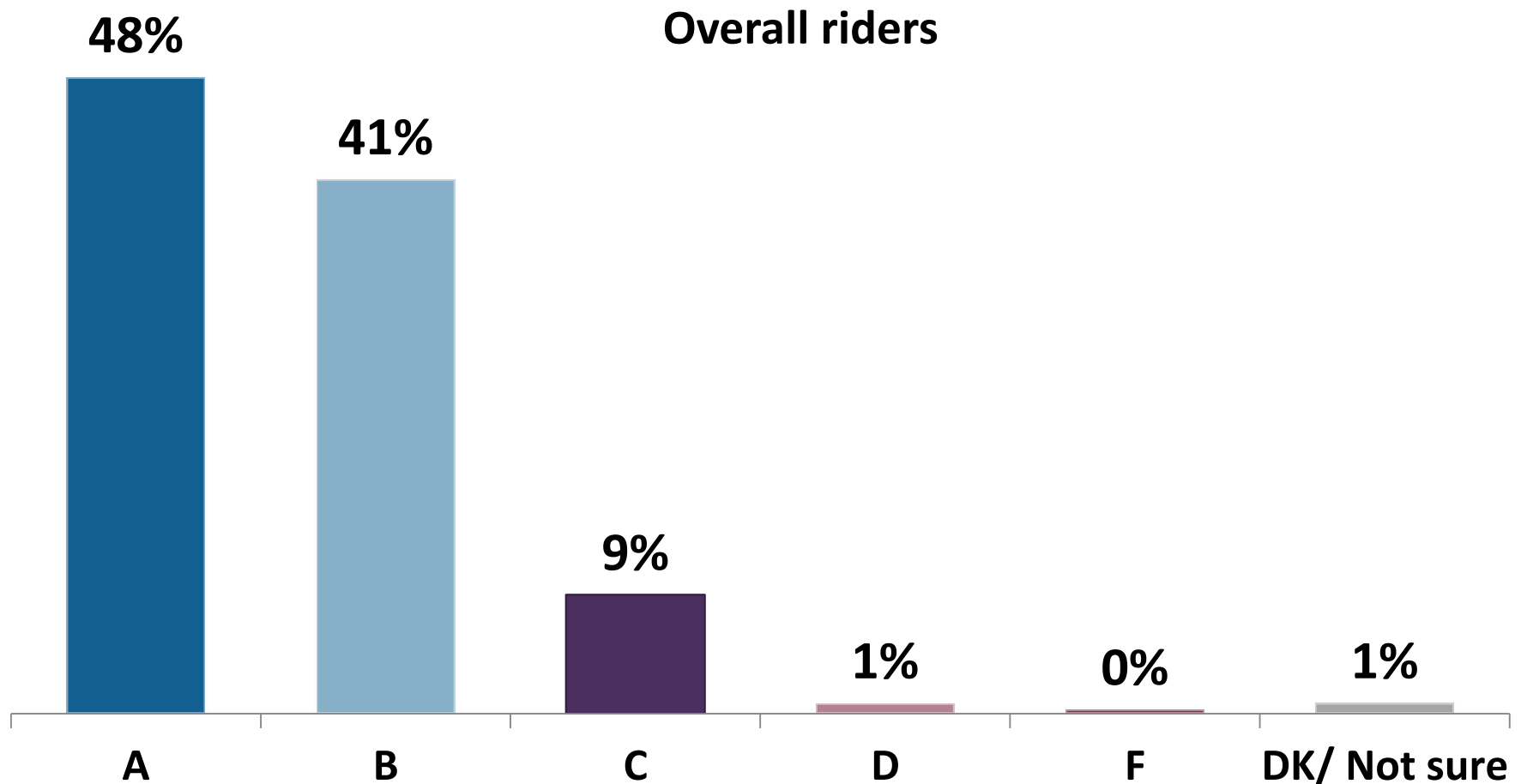


# Agency & Service Grades



# 2015 Sound Transit Grade Breakdown

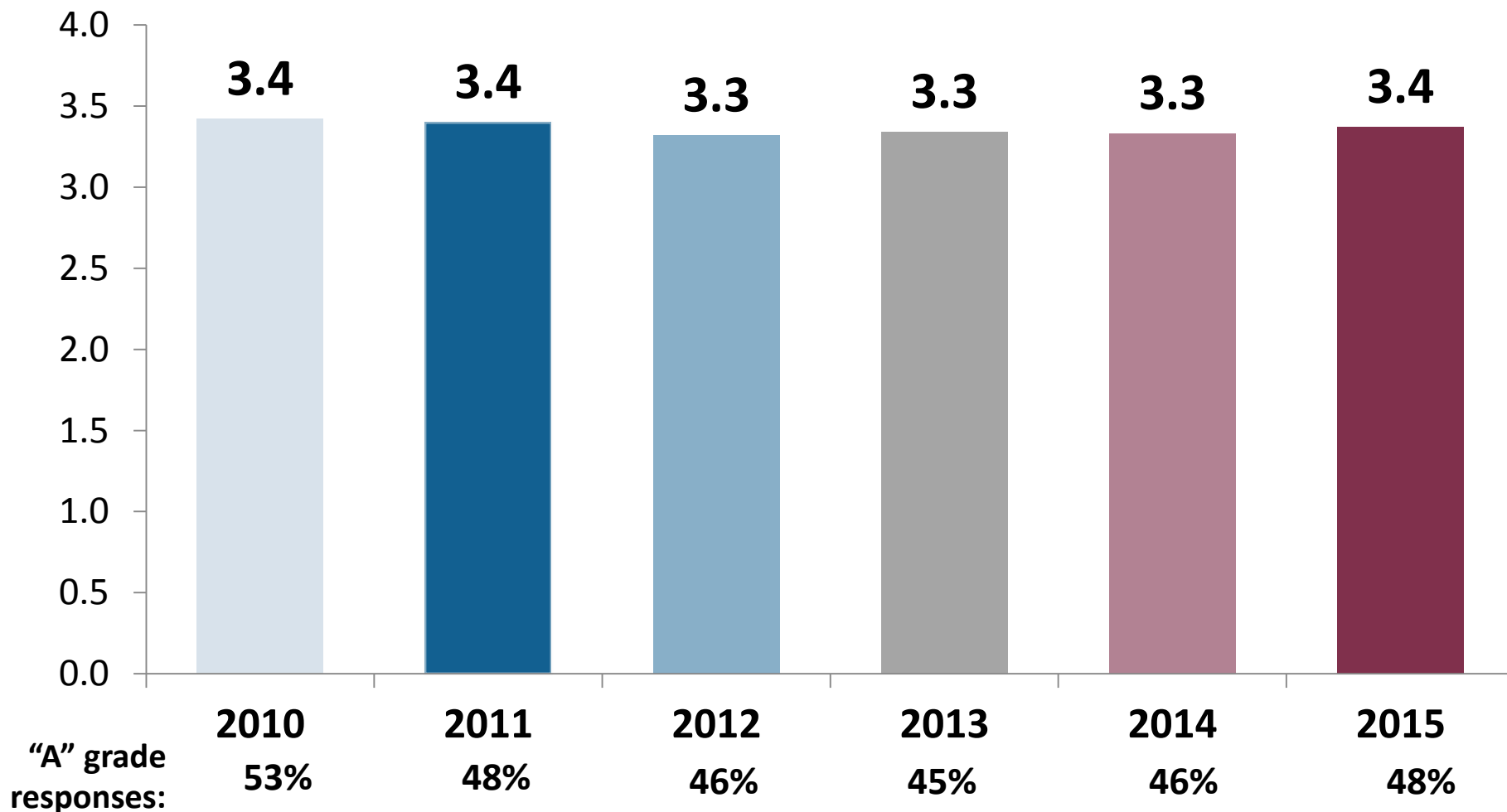
*A strong majority (89%) of riders give Sound Transit a positive overall rating of B or higher with nearly half (48%) giving the agency an A grade.*



# Sound Transit Grade by Year

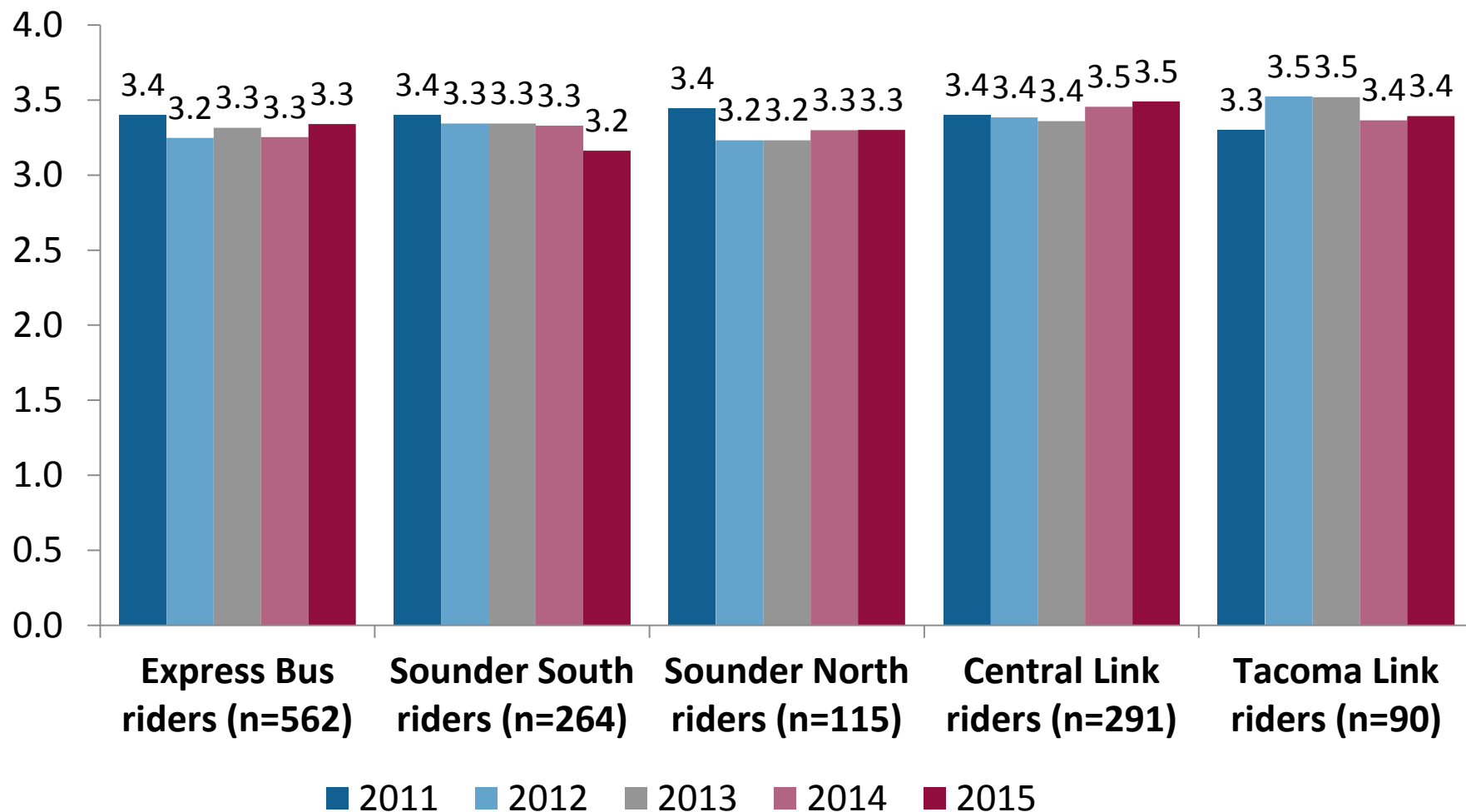
*ST's average GPA in 2015 remain consistent with previous years' grades.*

## Overall riders



# Sound Transit Grade by Service, by Year

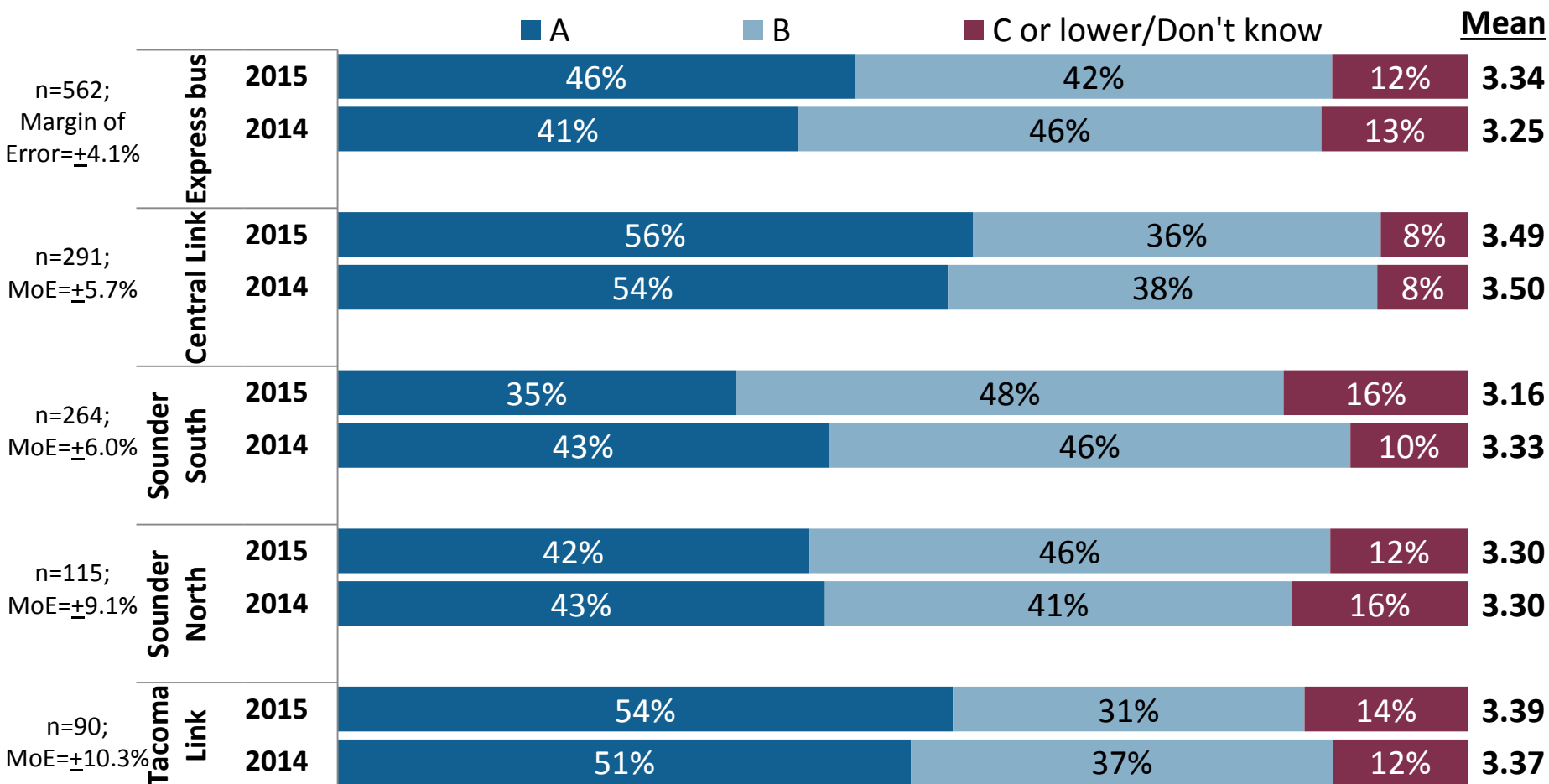
*Average Sounder Southline grades have dropped slightly while GPAs for the rest of Sound Transit's services have stayed on-par with previous years.*



# Sound Transit Grade – by Service

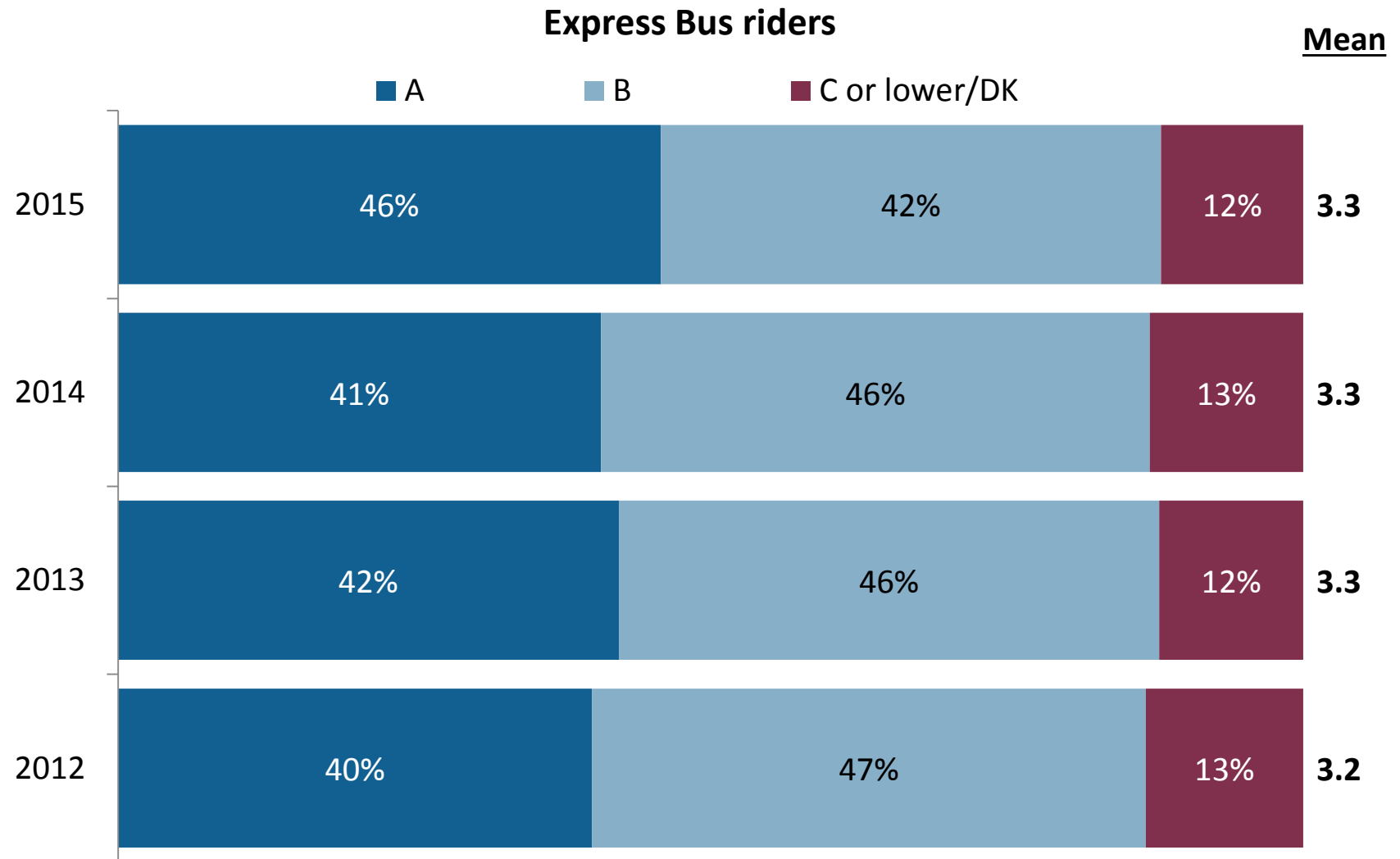
*South Sounder riders' ST grades have declined since last year (43% → 35% A grade); this is the only ST service with a significant drop in agency satisfaction ratings.*

*Express Bus riders ratings have improved slightly, with a near-majority giving ST an A grade. Ratings among Central Link, North Sounder and Tacoma link remain largely unchanged from 2014.*



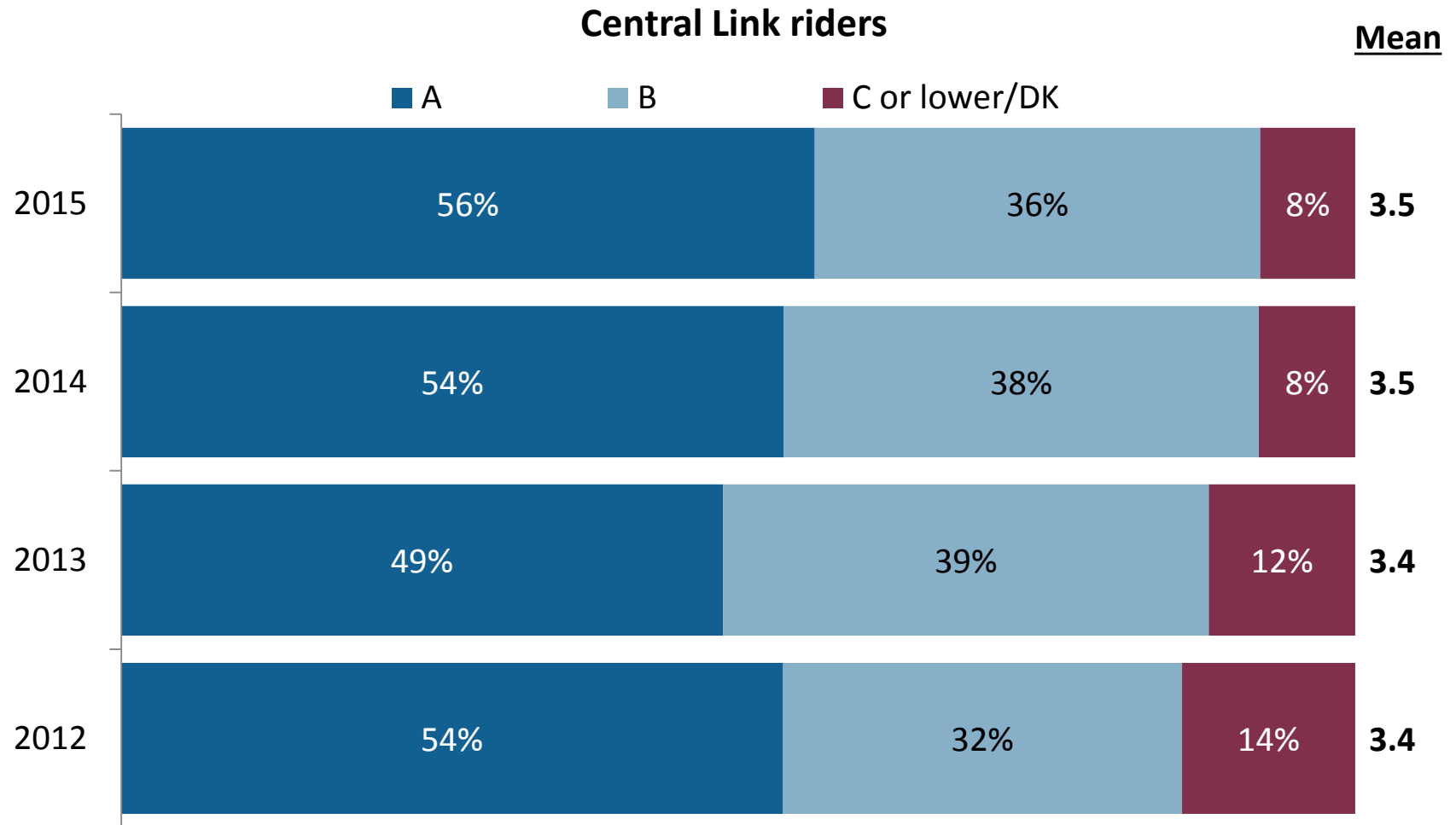
# Sound Transit Grade – by Express Bus Riders

*Express Bus riders ratings remain consistent, with most (88%) giving Sound Transit a B or higher.*



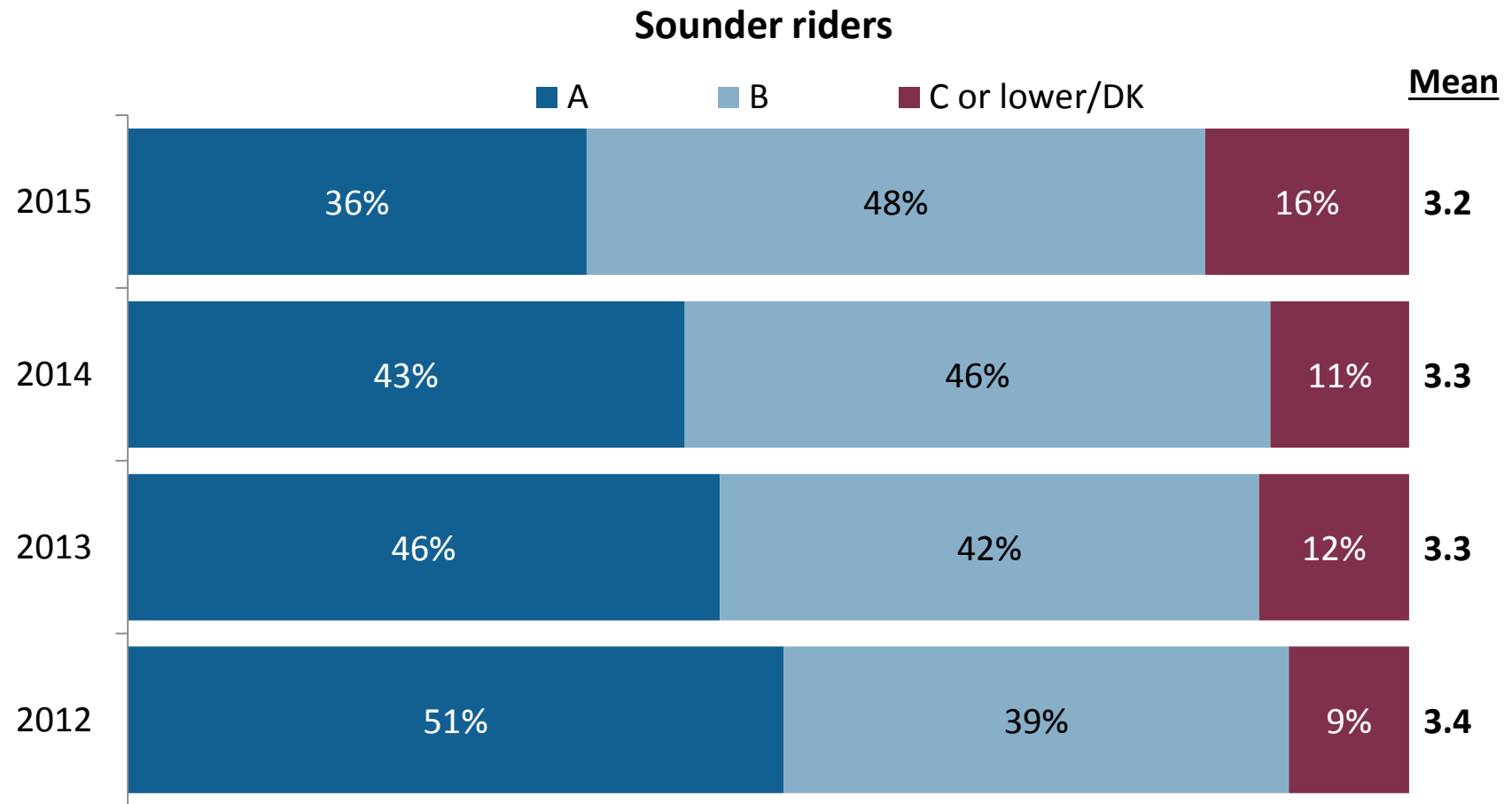
# Sound Transit Grade – by Central Link Riders

*Central Link riders continue to be satisfied with Sound Transit; a majority (56%) give the agency an A grade while under a tenth (8%) rate it a C or lower.*



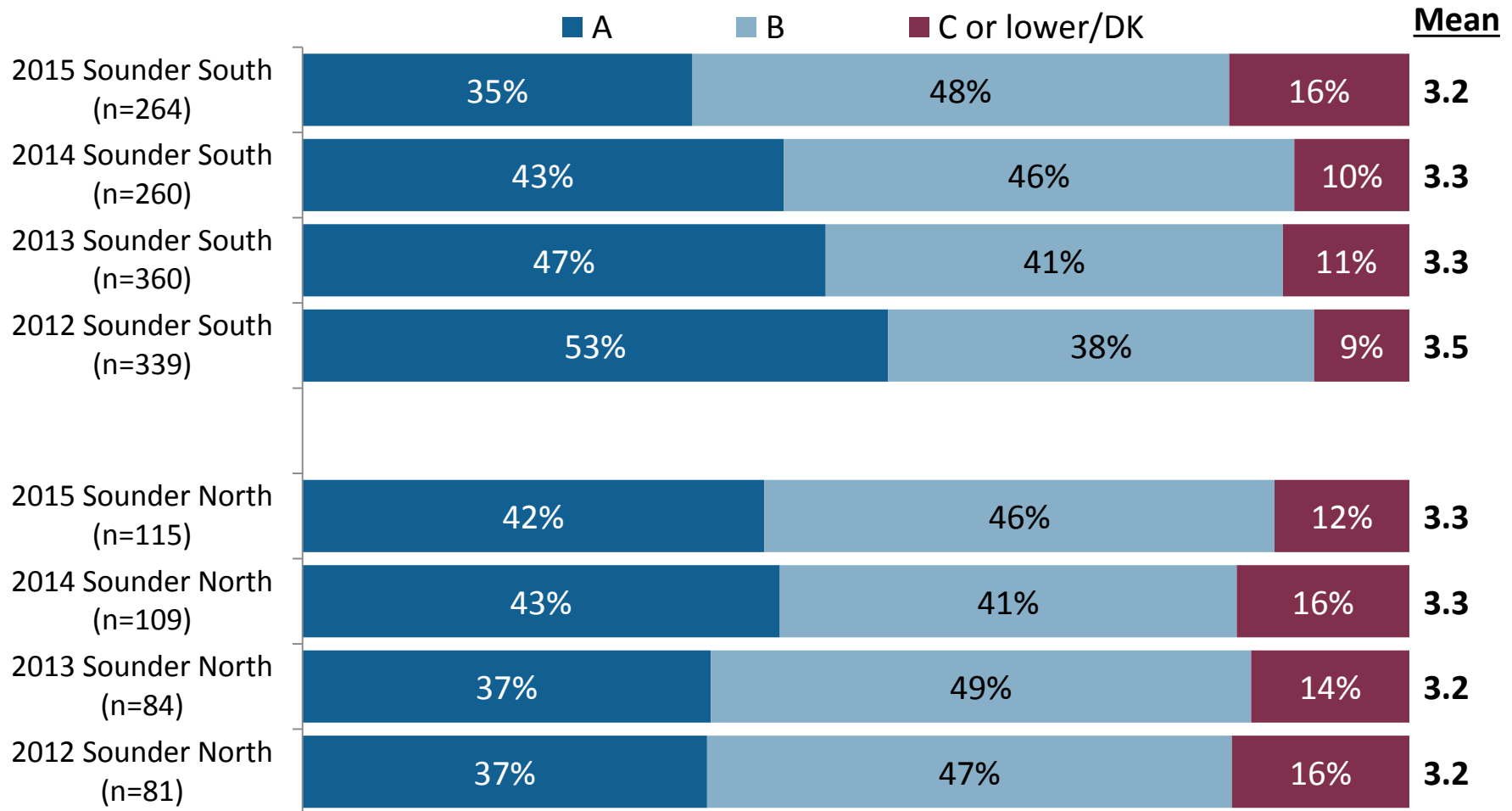
# Sound Transit Grade – by Sounder Riders

*Year-to-year agency ratings have gradually declined among Sounder riders, overall. This shift is primarily driven by a ratings dip among Southline riders.*



# ST Grade – Sounder North & South, Year by Year

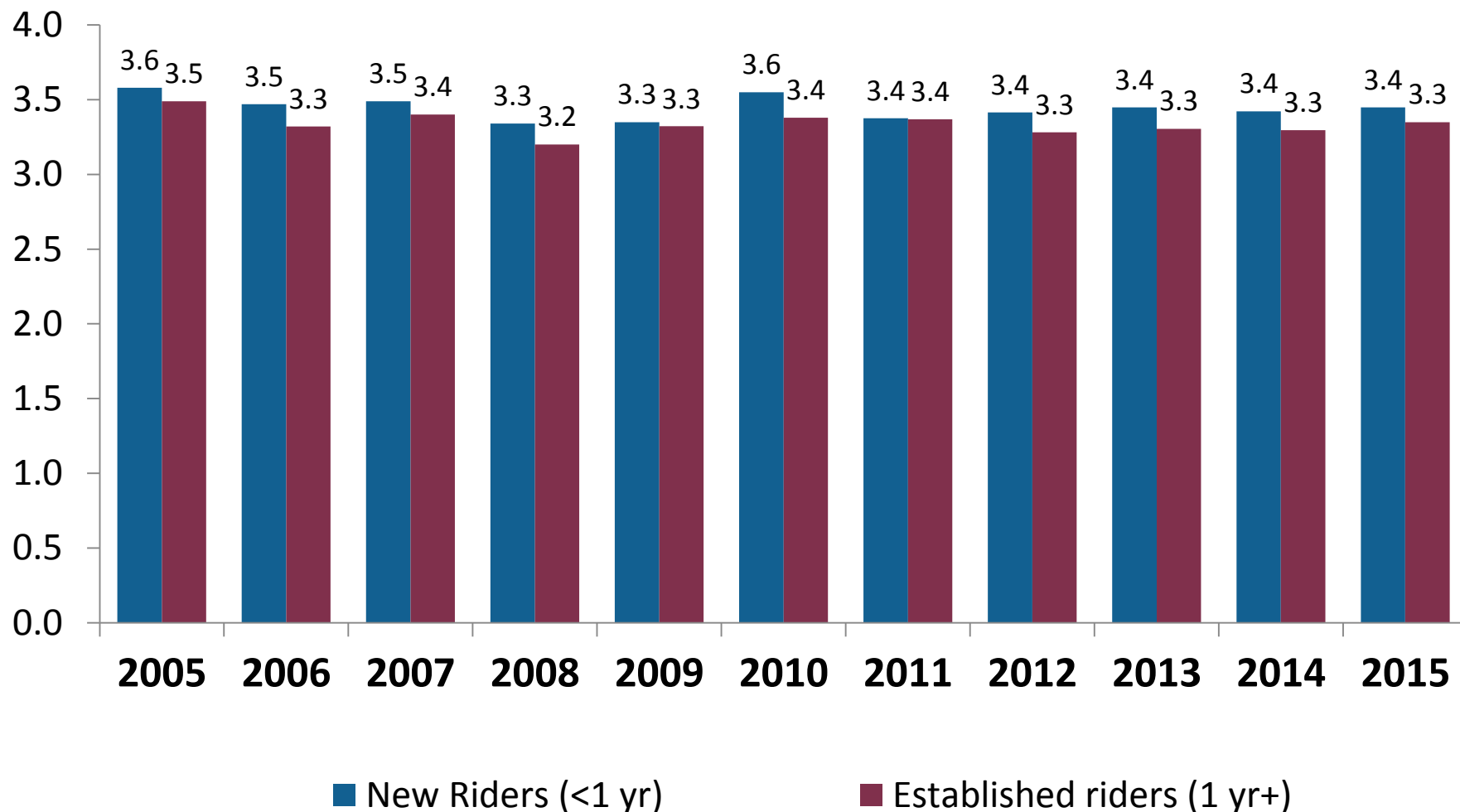
*Among Southline riders, ST ratings have continued to decline over the last three years, resulting in a 18 point drop since 2012. Northline riders rate the agency similarly to 2014.*





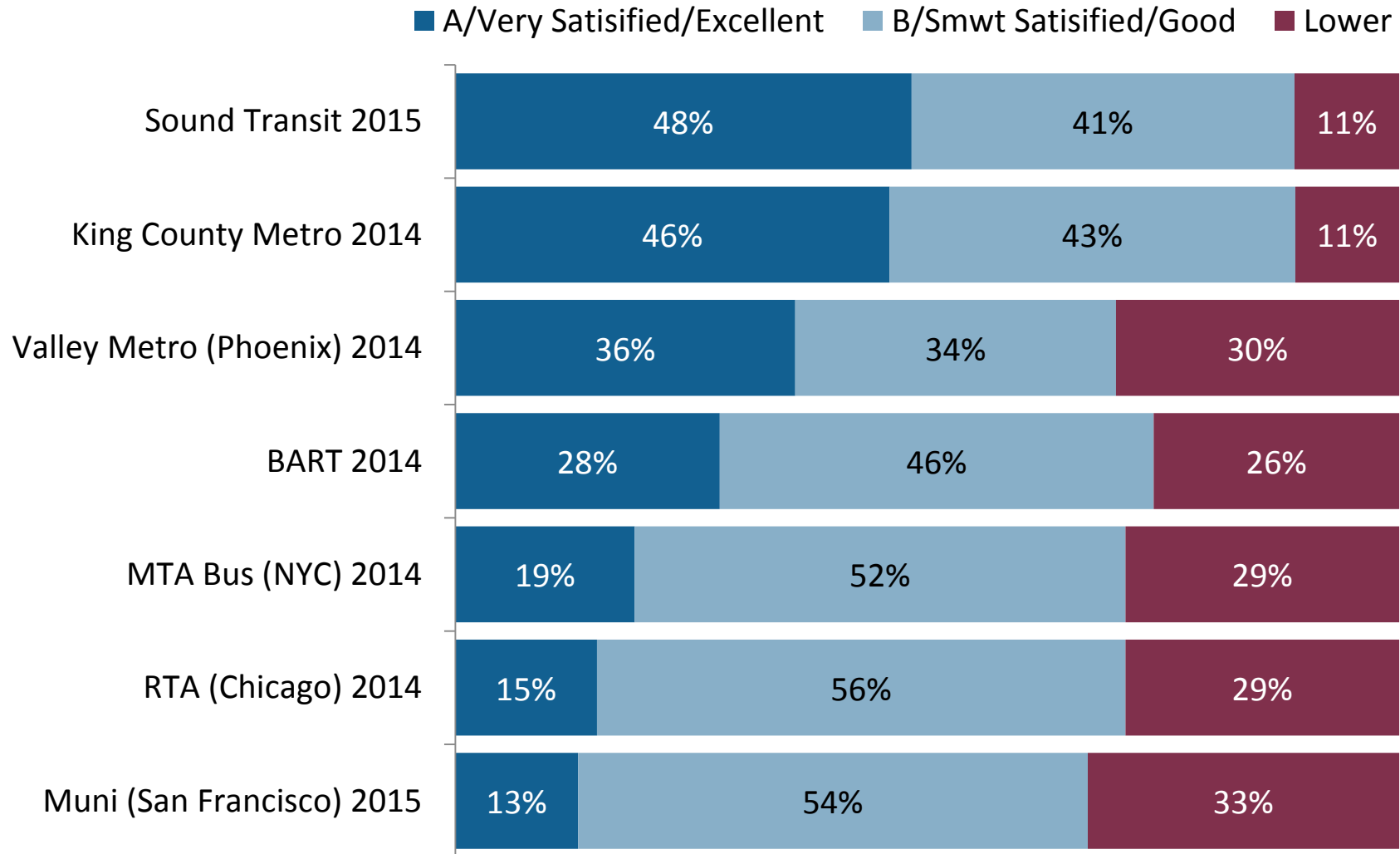
# ST Grade by Length of Ridership

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



# Benchmarking Against Other Agencies

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



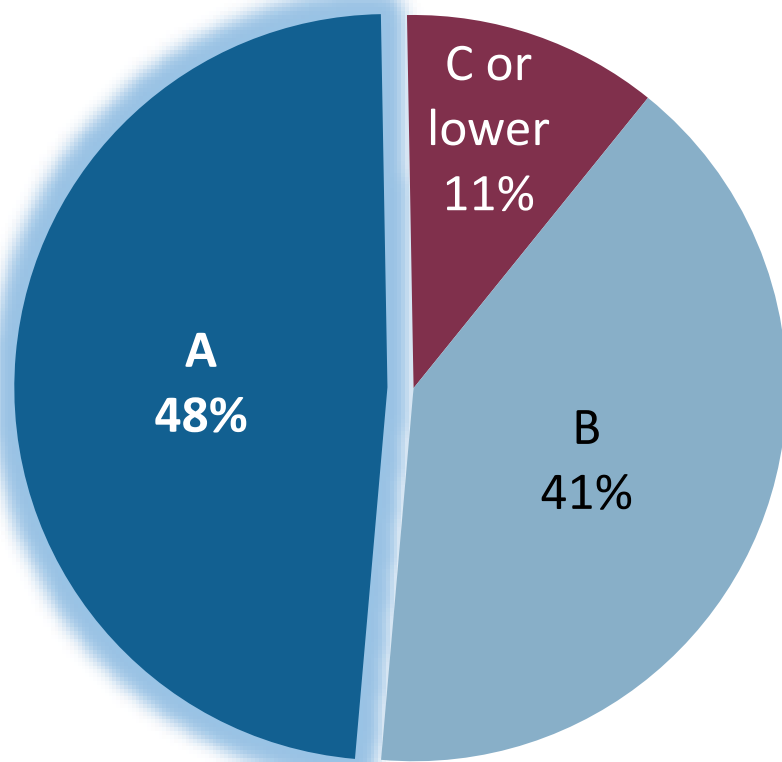


# Top-of-Mind Improvements

# Grade in Focus: A Grade

*In addition to the third (32%) of general/broad positive mentions, service reliability (19%) is the top specific reason for giving Sound Transit an A grade. Convenience (10%) and traffic avoidance (7%) follow.*

## 5. Sound Transit Grade



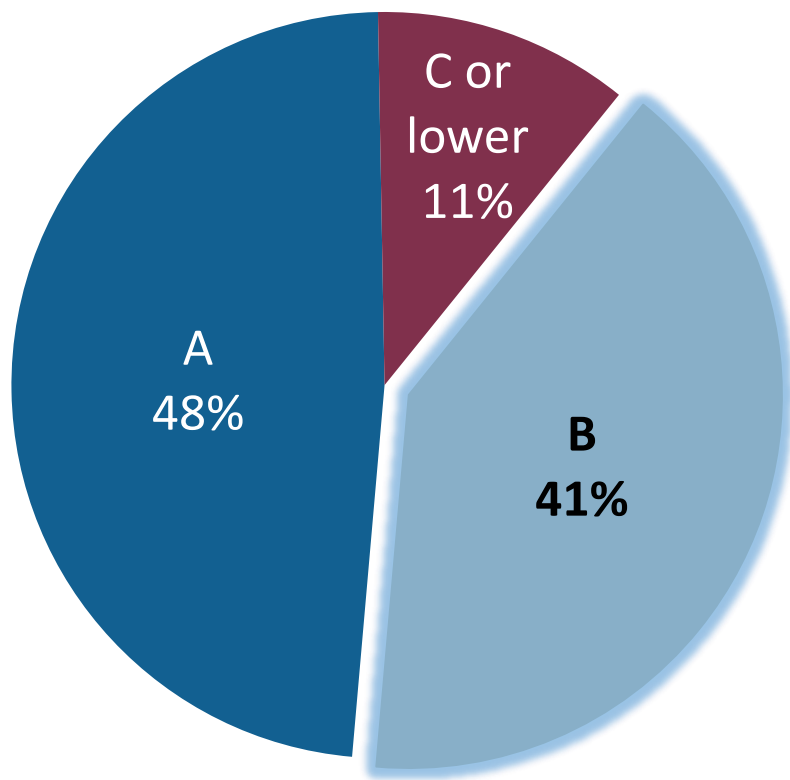
6. What are your reasons for that grade?  
(multiple responses; **first** response shown)

6. Top Reasons for A Grade	%
General positives (Nice/ Fun/ No complaints)	32%
Reliable/ Prompt/ Runs often	19%
Convenient	10%
Fast/ Avoids traffic	7%
Good coverage/ Goes to destination	4%
Affordable fare/ Free parking	4%
Clean/ Nice	3%
Friendly/ helpful operators & personnel	2%
Comfortable/ Relaxing	2%
Late at times/ Always late	<1%
More service/ routes/ buses	<1%
Safe/ Secure	<1%
Other Reasons	16%

# Grade in Focus: B Grade

*Among those giving ST a B grade, reliability/promptness (6%) is the most common positive reason.*

## 5. Sound Transit Grade



## 6. Top Positive Reasons for B Grade

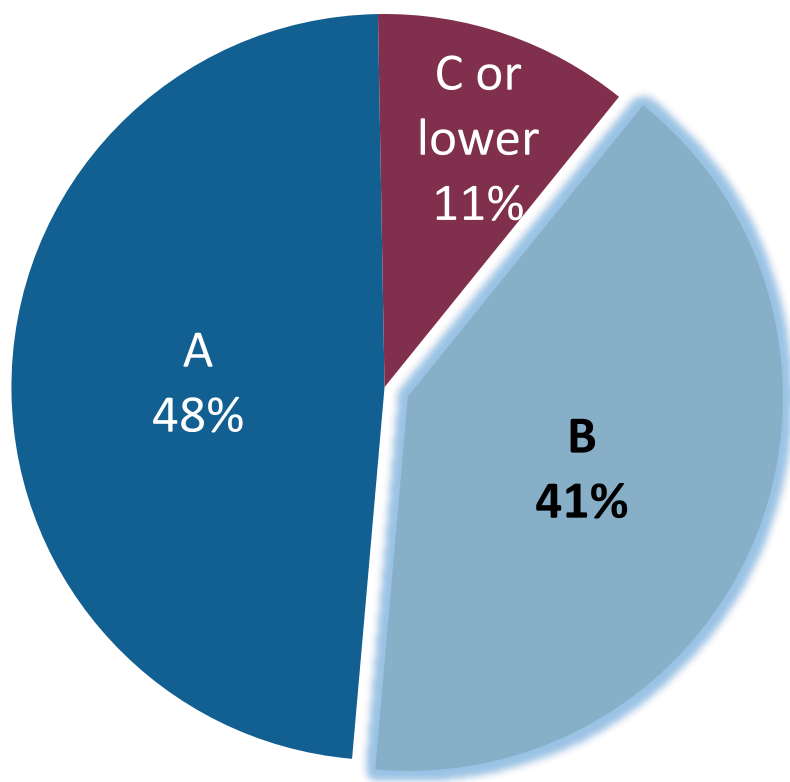
	%
General positives (Nice/ Fun/ No complaints)	10%
Reliable/ Prompt/ Runs often	6%
Convenient	3%
Friendly/ helpful operators & personnel	1%
Fast/ Avoids traffic	1%
Clean/ Nice	1%
Affordable fare/ Free parking	1%
Comfortable/ Relaxing	1%
Good coverage/ Goes to destination	<1%
Safe/ Secure	<1%
Other positives	2%

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

# Grade in Focus: B Grade

*Lateness (20% mentioned) is the top negative reason for giving ST a B grade, followed by a variety of expansion-related suggestions (crowded, more service, expand schedule).*

## 5. Sound Transit Grade



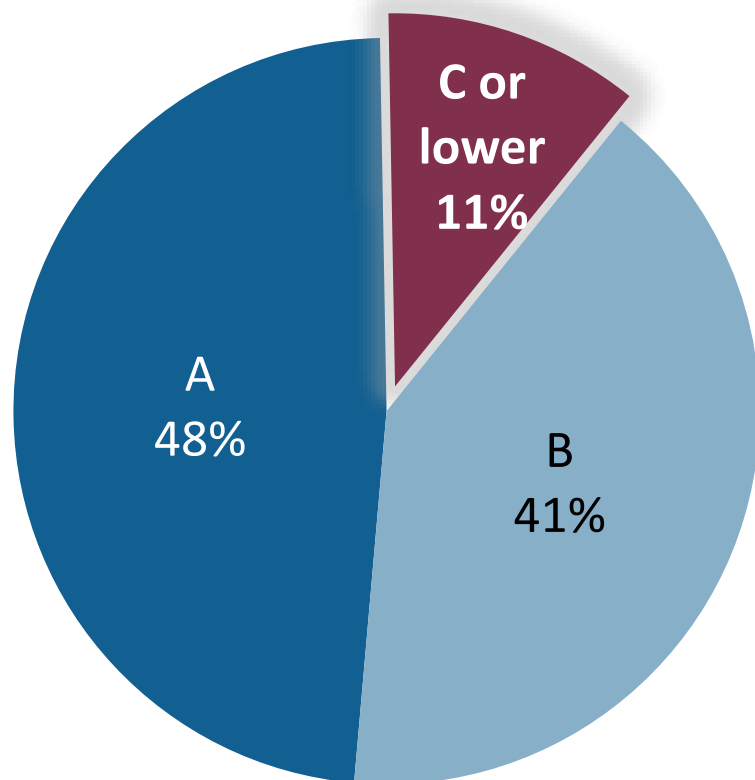
6. What are your reasons for that grade?  
(multiple responses; **first** response shown)

6. Top Negative reasons for B Grade	%
Late at times/ Always late	20%
Crowded/ Larger buses/trains	9%
More service/ routes/ buses	7%
Improve/ Expand schedule	4%
Slow/ Too many stops/ More express	2%
Need more parking	2%
Too expensive	1%
Rude drivers & personnel	1%
Too early/ Doesn't wait	<1%
Other Negatives	13%

# Grade in Focus: C Grade

*Lateness (23% mentioned) and overcrowding (10%) are riders' top reasons for giving ST a C grade or lower.*

## 5. Sound Transit Grade



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

6. Top Negative C Reasons	%
Late at times/ Always late	23%
Crowded/ Larger buses/trains	10%
More service/ routes/ buses	6%
Improve/ Expand schedule	6%
Too expensive	4%
Slow/ Too many stops/ More express	3%
Need more parking	2%
Rude drivers & personnel	1%
Too early/ Doesn't wait	1%
Other negatives	18%

# Improving Grade – by Service

*System investments – particularly more frequent buses/trains– make up the bulk of top-of-mind service improvements for Sounder and Express bus riders. Better on-time performance and communicating delays/cancellations are also common performance improvement suggestions among Sounder riders.*

<i>Top Suggestions for improvement</i>	<b>Exp. Bus</b>	<b>Sounder South</b>	<b>Sounder North</b>	<b>Central Link</b>	<b>Tacoma Link</b>
<b>Performance suggestions (flexible improvements)</b>	<b>16%</b>	<b>20%</b>	<b>15%</b>	<b>10%</b>	<b>6%</b>
Be on-time/adhere to schedule/less delays	9%	12%	9%	3%	-
Notice/communication of problems, delay, etc.	3%	5%	4%	2%	1%
Improve scheduling/better scheduling-coordinated schedules	2%	3%	1%	3%	3%
Driver training/cold weather training	1%	-	-	<1%	-
Other performance suggestions	1%	<1%	1%	1%	1%
<b>System Suggestions (“More” investments)</b>	<b>54%</b>	<b>58%</b>	<b>58%</b>	<b>35%</b>	<b>37%</b>
Run more often/more frequent buses/trains	16%	21%	20%	3%	6%
Overcrowding/SRO/Larger-longer buses	10%	3%	7%	5%	2%
More routes/expand-extend service/add weekend service	8%	5%	10%	7%	13%
New/cleaner buses/trains	3%	<1%	-	2%	-
Expand schedule/ Run earlier/later	2%	13%	8%	5%	7%
More/better parking	2%	8%	3%	2%	2%
Fewer stops/Direct/express routes/HOV lane	2%	1%	1%	1%	<1%
Other system suggestions	9%	7%	10%	10%	7%
<b>All Other suggestions</b>	<b>9%</b>	<b>9%</b>	<b>13%</b>	<b>13%</b>	<b>8%</b>
<b>Nothing/ Don't know/ No answer</b>	<b>22%</b>	<b>13%</b>	<b>14%</b>	<b>41%</b>	<b>50%</b>

7. What overall improvements could Sound Transit do to improve its services?  
(multiple responses; **first** response shown)

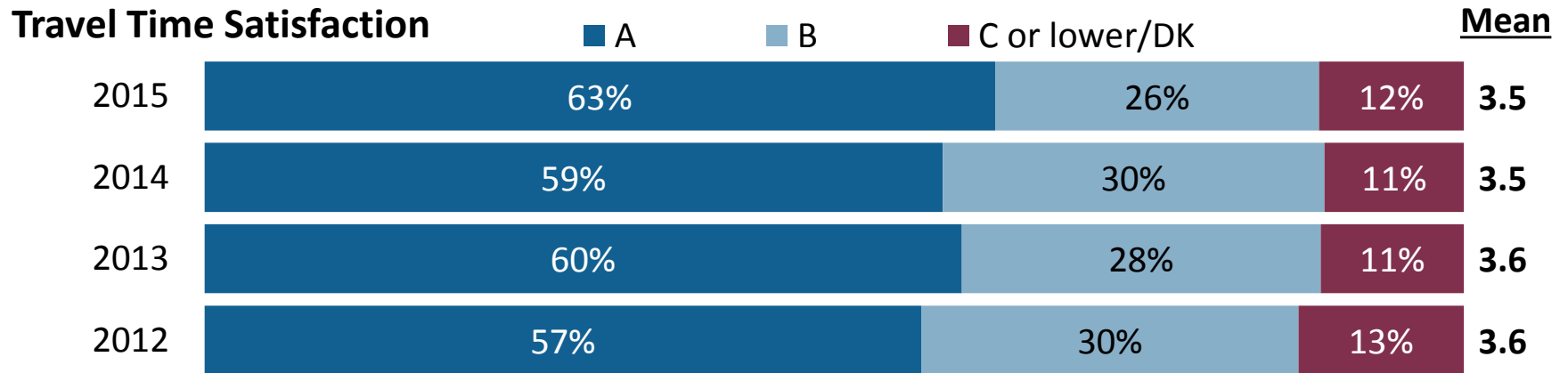




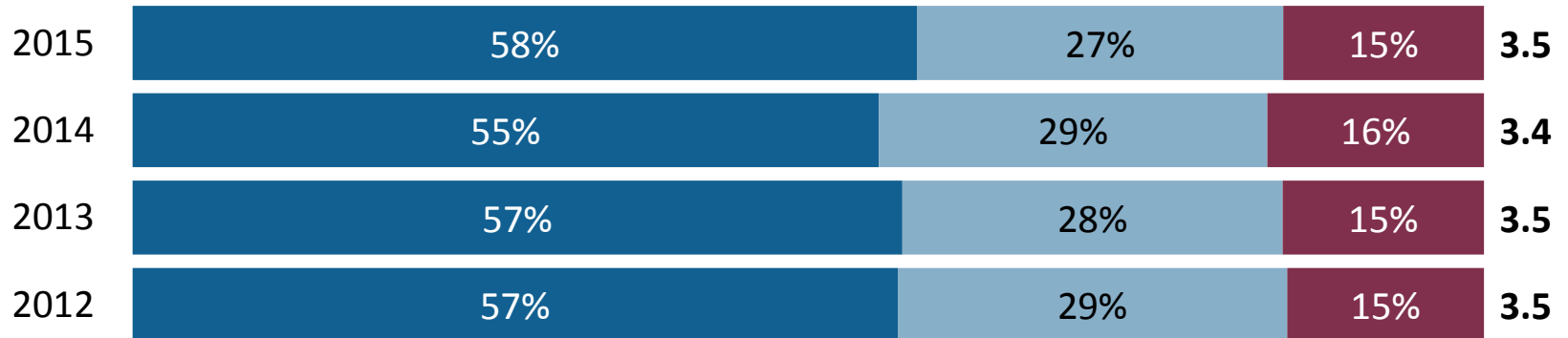
# Performance Attribute Ratings and Grades: Time Satisfaction

# Time Satisfaction – Overall Year-to-Year

*Overall trip time ratings have improved slightly from previous years; a majority (63%) of riders gave these attributes an A grade. Service-wide on-time satisfaction has also increased slightly from 2014 (55 → 58% A grade). Service-wide on-time satisfaction has also increased slightly from 2014 (55 → 58% A grade).*



## On-Time Satisfaction



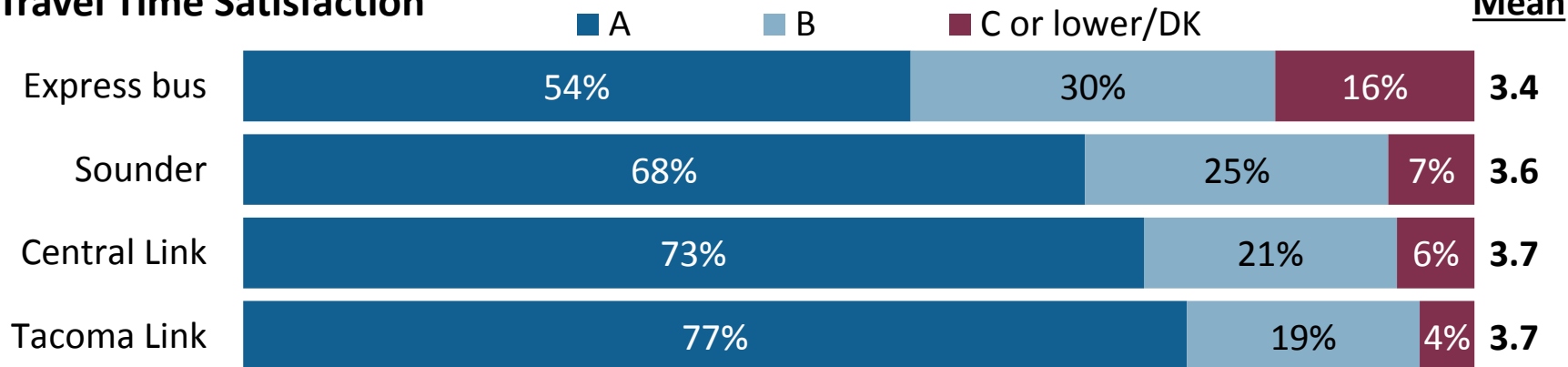
27. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

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

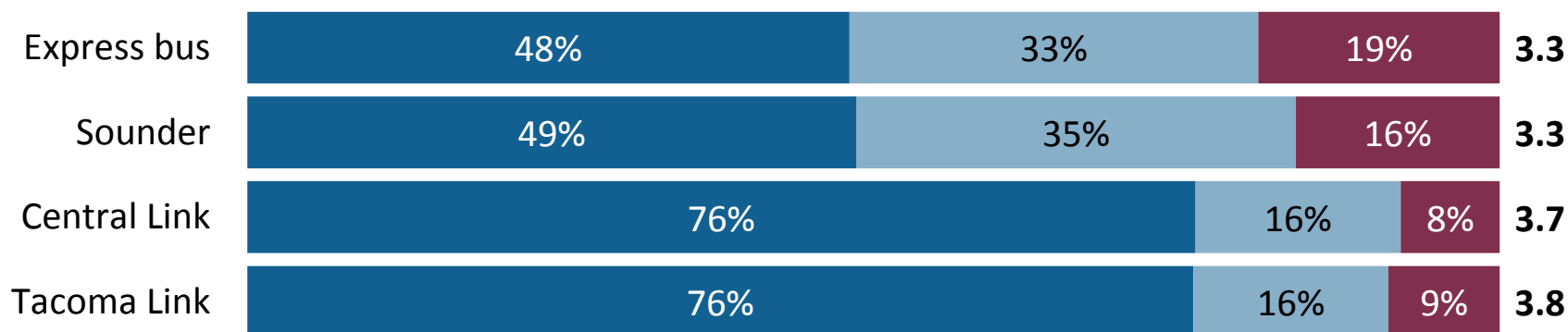
# Time Satisfaction – by Service

*Express bus riders rate travel time (54% A grade) and on-time performance (48%) the lowest of ST's services. While the rail services have traditionally performed better on time satisfaction, Sounder riders OTP a comparably low satisfaction rating (49% A) in 2015.*

## Travel Time Satisfaction



## On-Time Satisfaction



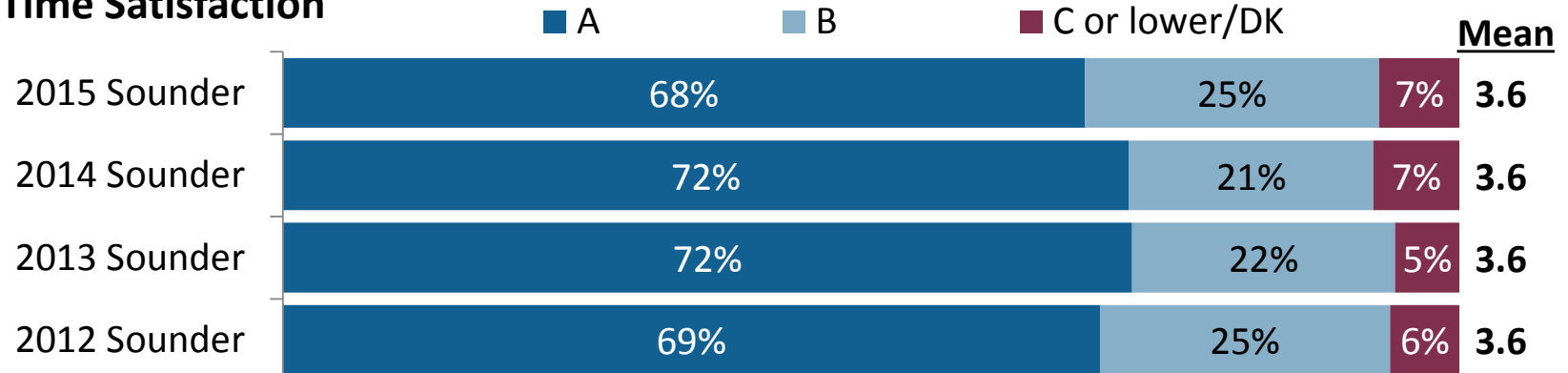
27. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

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

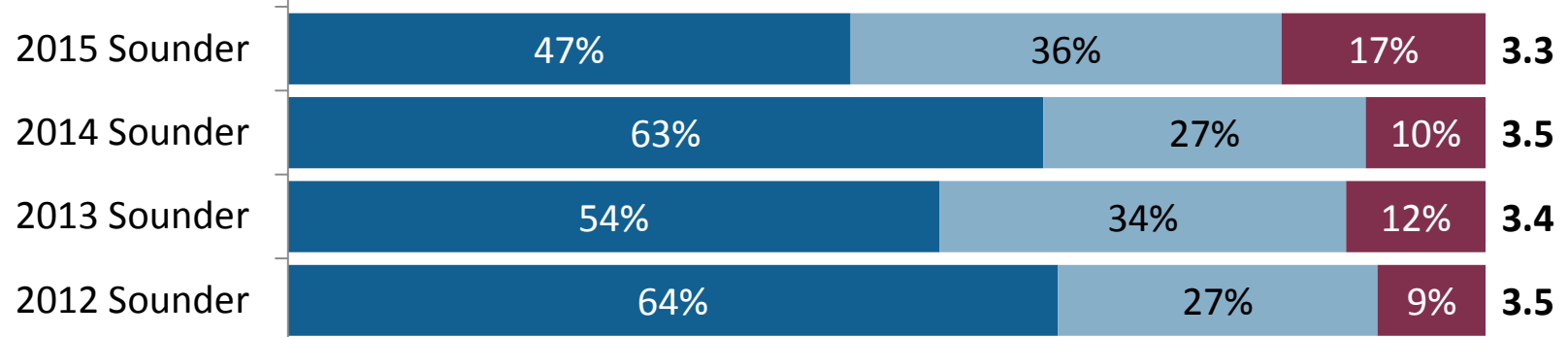
# Time Satisfaction – Sounder South Year-by-Year

*Among Sounder Southline riders, travel time satisfaction dropped slightly (72 → 68% A) while on-time performance declined significantly (63 → 47%), continuing a relatively volatile trend over the last few years.*

## Travel Time Satisfaction



## On-Time Satisfaction



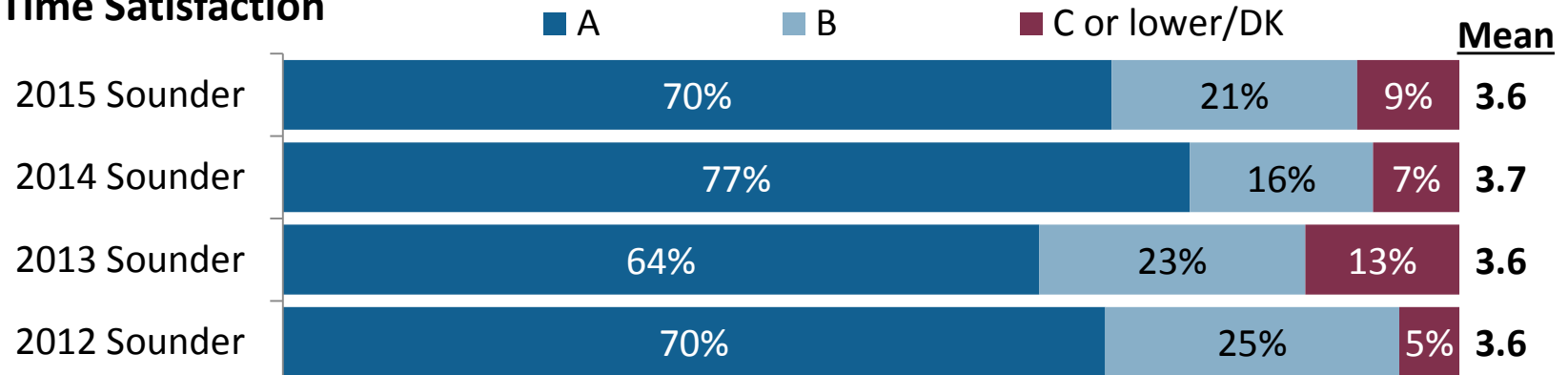
27. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

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

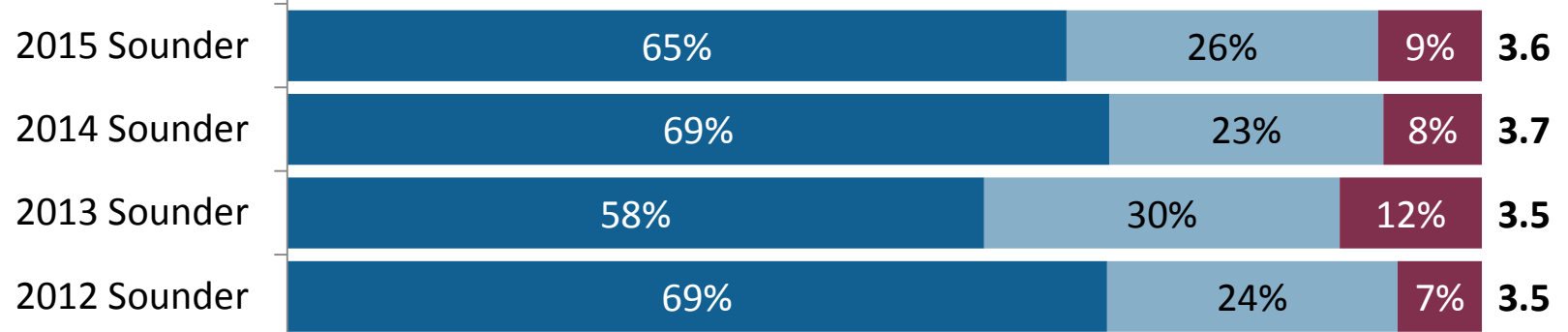
# Time Satisfaction – Sounder North Year-by-Year

*Among Northline riders, trip time satisfaction has declined from 2015 (77 → 70% A) while on-time satisfaction has remained similar.*

## Travel Time Satisfaction



## On-Time Satisfaction

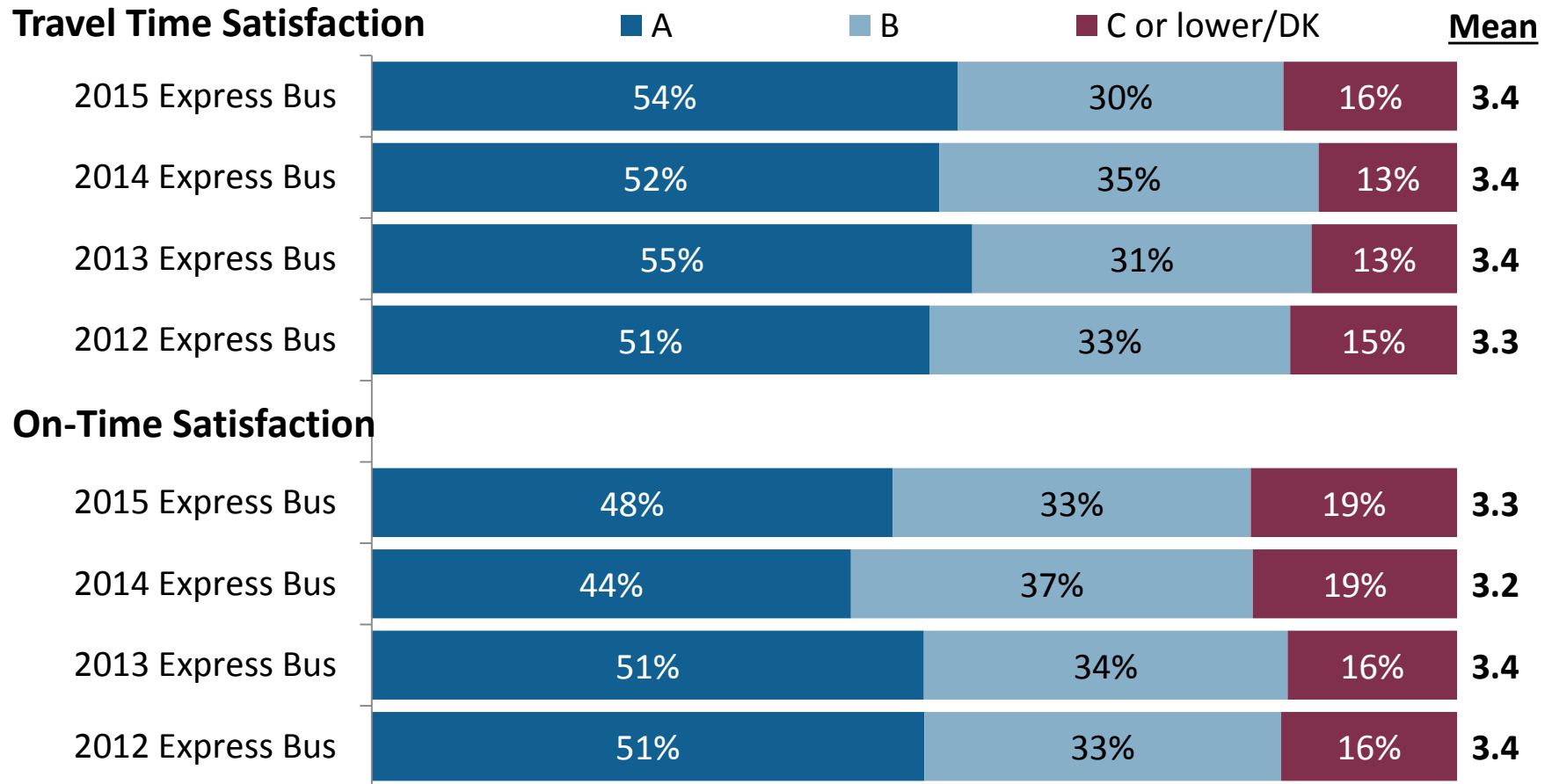


27. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

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

# Time Satisfaction – Express Bus Year-by-Year

*Travel time and on-time satisfaction ratings rebounded slightly for Express bus riders in 2015.*

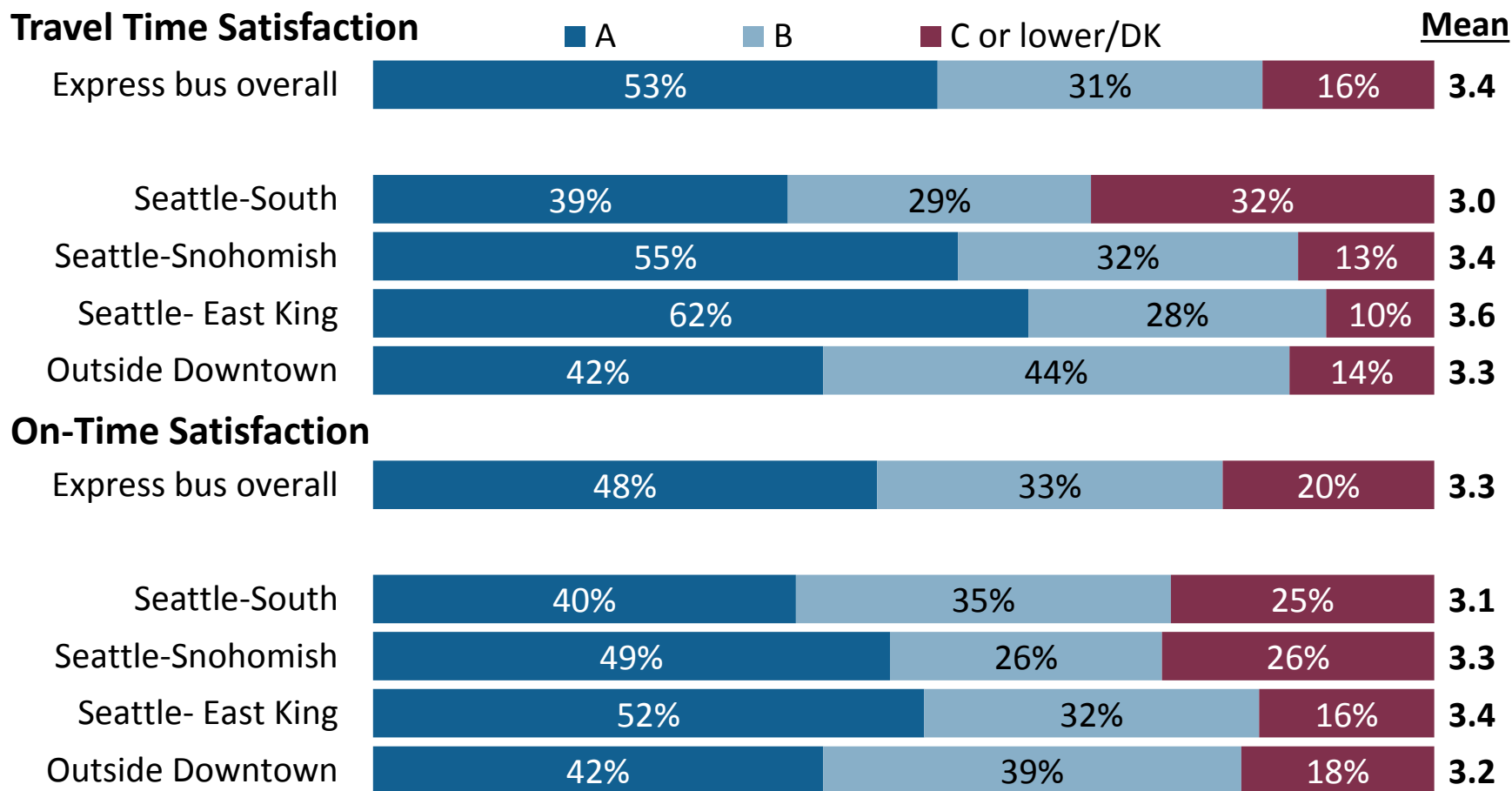


Q27. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

Q28. How would you grade the on-time performance of Express Bus/ LR/ Sounder?

# Express Bus Time Satisfaction – by Region

*Time satisfaction ratings are lowest for Express bus riders on routes running between Seattle and South King/Pierce routes and those that do not connect to Downtown Seattle. Routes running in East and North King/Snohomish receive the highest travel time and OTP grades.*



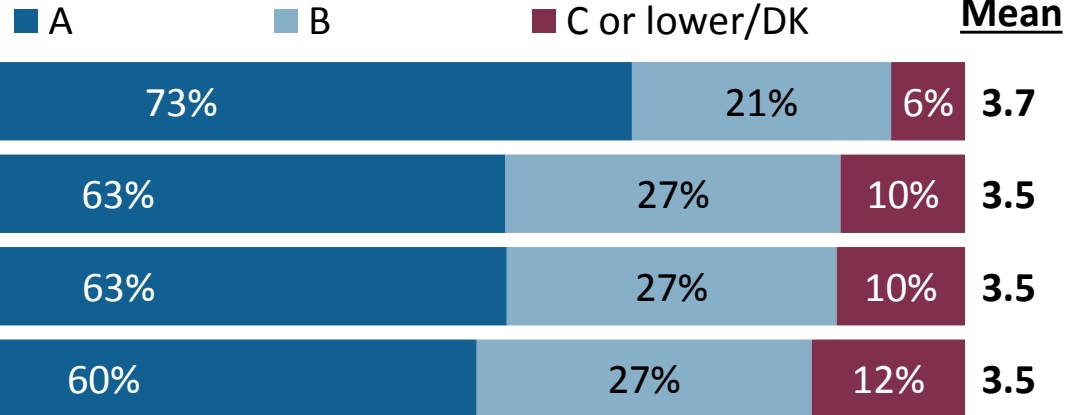
27. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

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

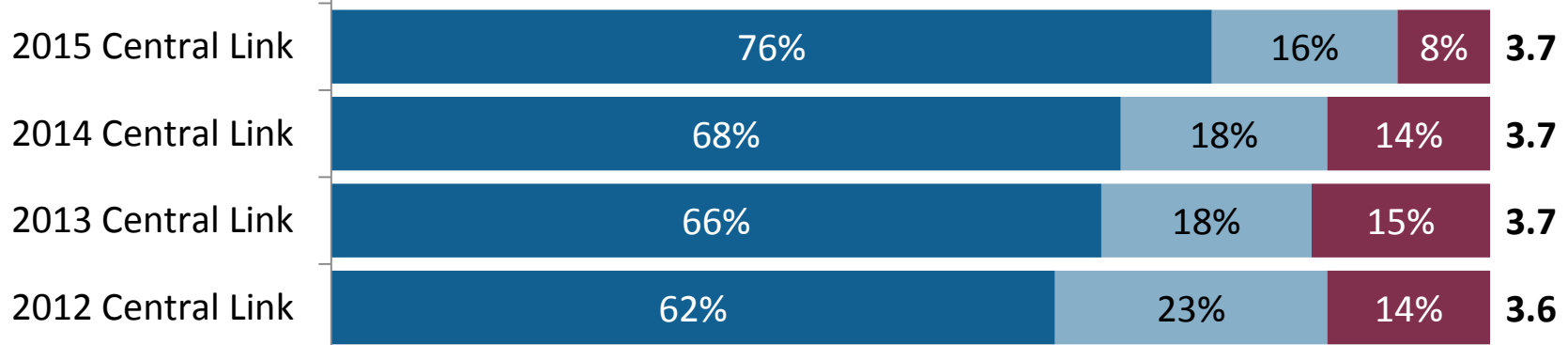
# Time Satisfaction – Central Link Year-by-Year

*Travel time (63% → 73% A) and on-time performance (68 → 76%) have both increased significantly among Central Link riders, with about three quarters of Link riders rating these attributes as an A.*

## Travel Time Satisfaction



## On-Time Satisfaction



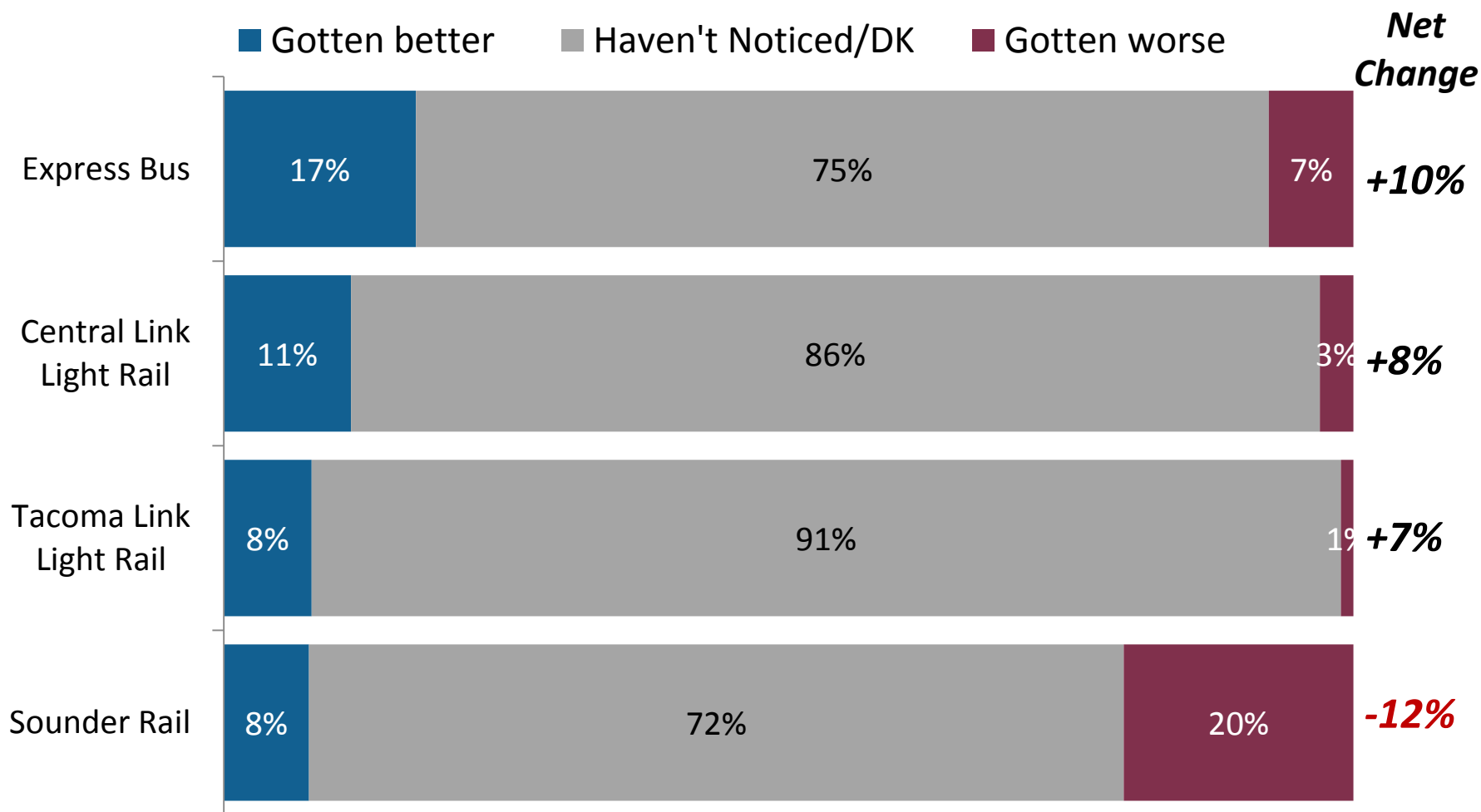
27. How would you grade your satisfaction with the total time it takes you to travel to your destination on Express Bus/ LR/ Sounder?

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



# Change in On-time Performance by Service

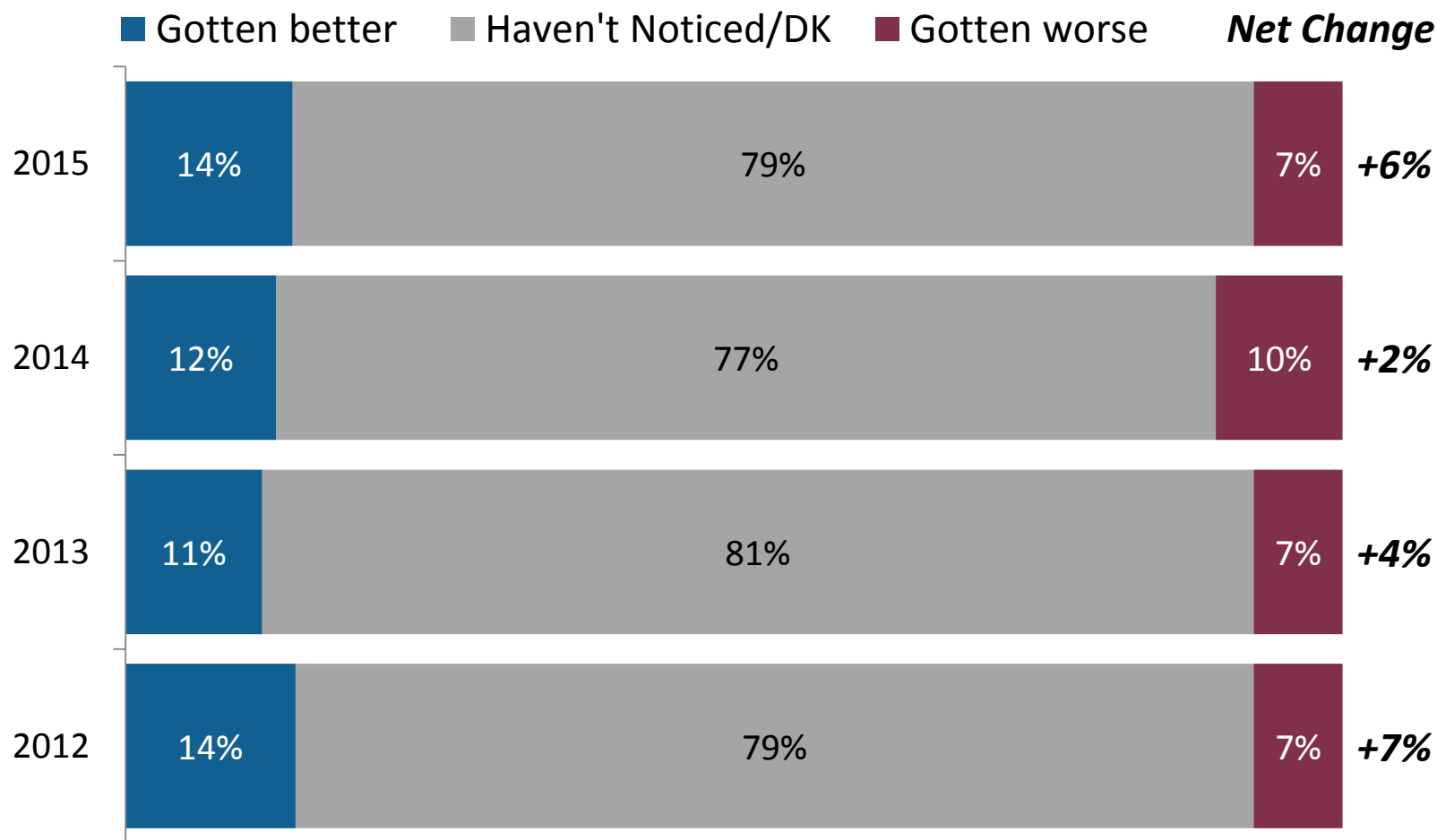
*While most riders have not noticed a change in on-time performance, over twice as many Sounder riders think OTP has gotten worse than better since last year.*



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

# Change in On-time Performance by Year

*Four-in-five riders have not noticed a change in the on-time performance of overall Sound Transit services over the last year.*



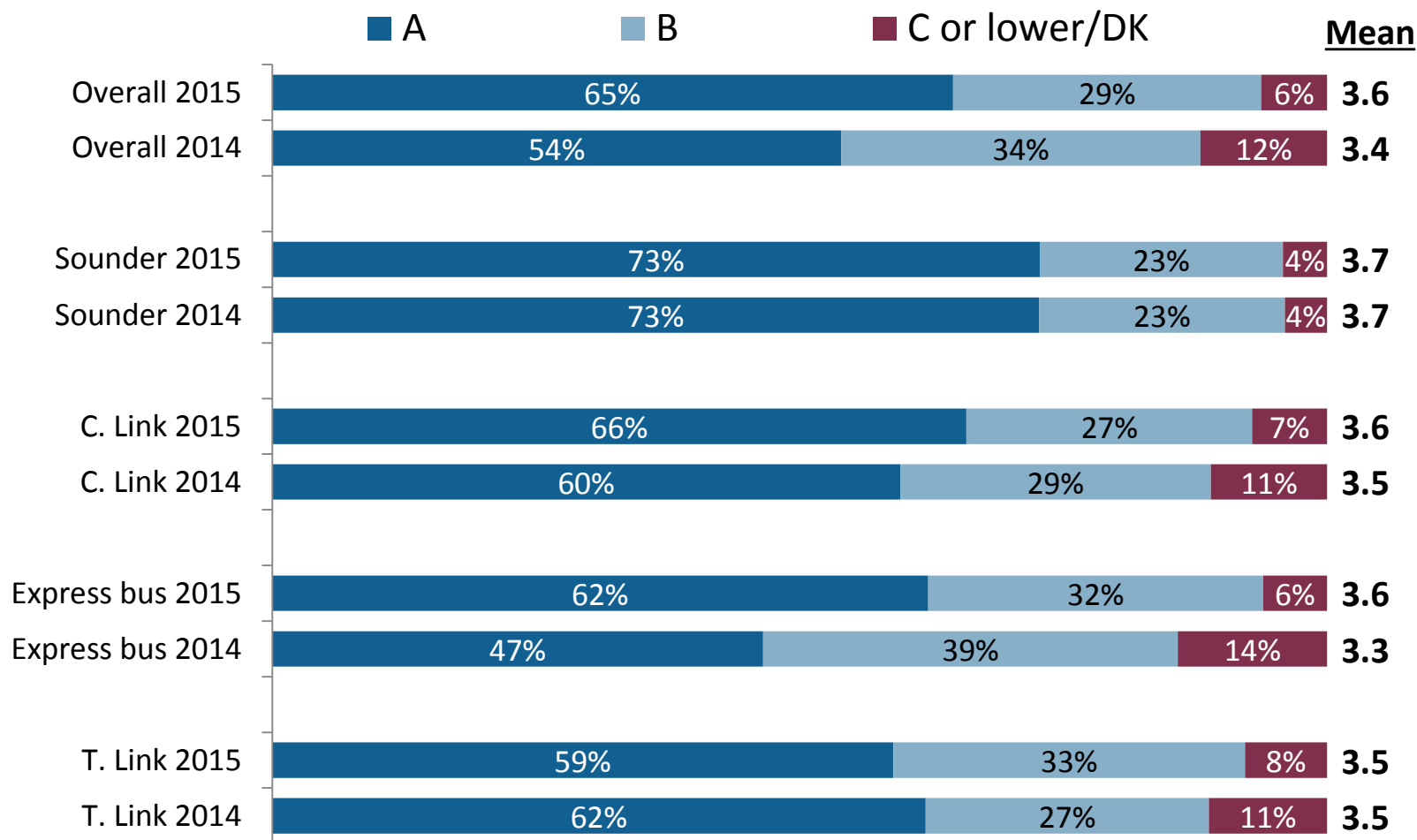
29. in the last year, has the on-time performance gotten better, gotten worse, or have you not noticed a change?



# Performance Attribute Ratings and Grades: Cleanliness

# On-Board Cleanliness Rating

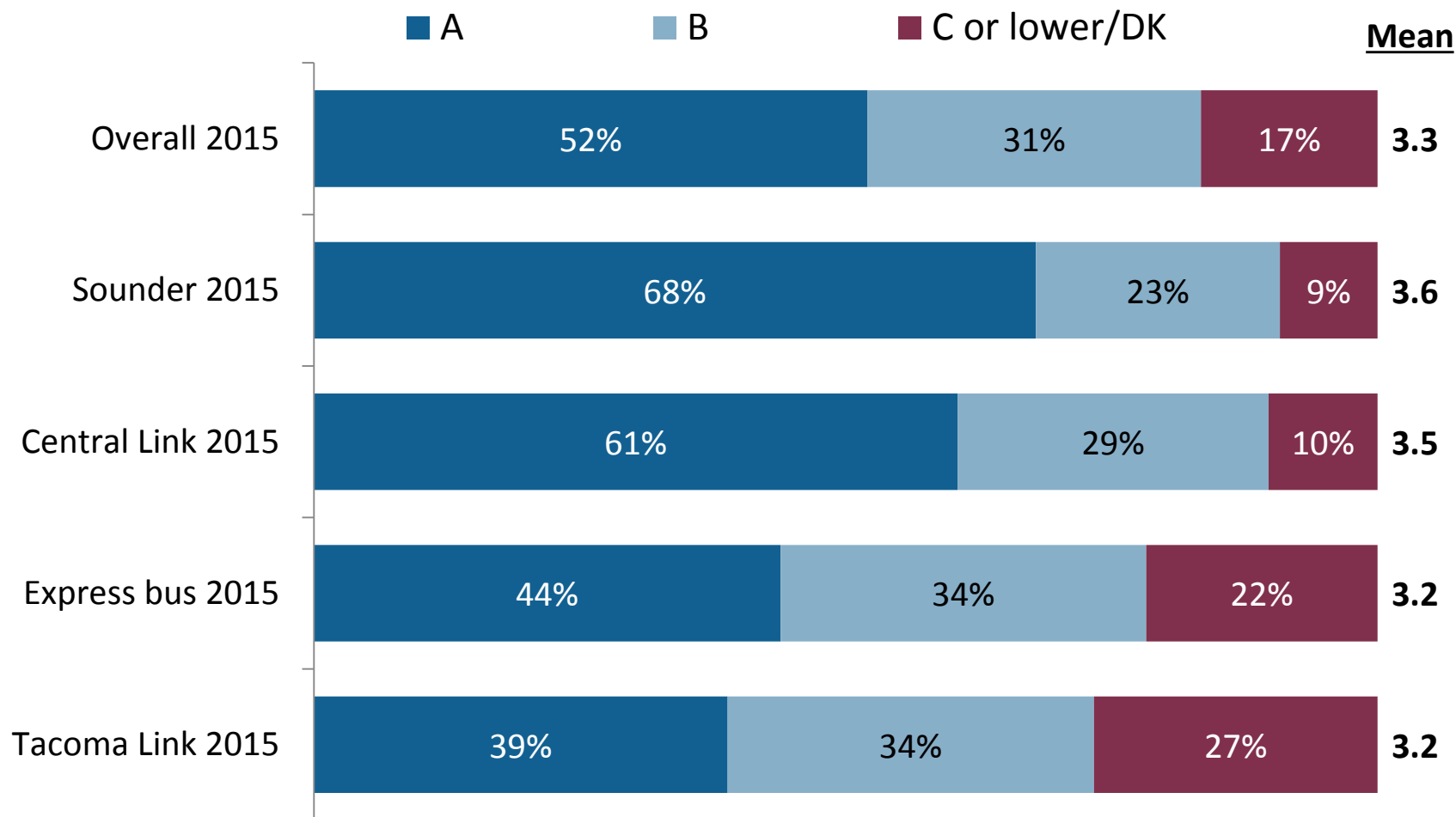
*ST's on-board cleanliness ratings have improved significantly since 2014 (54 → 65% A). This is primarily driven by improved ratings among Express bus (+15% A) and Central Link (+6%) riders, with Sounder and Tacoma Link remaining consistent.*



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

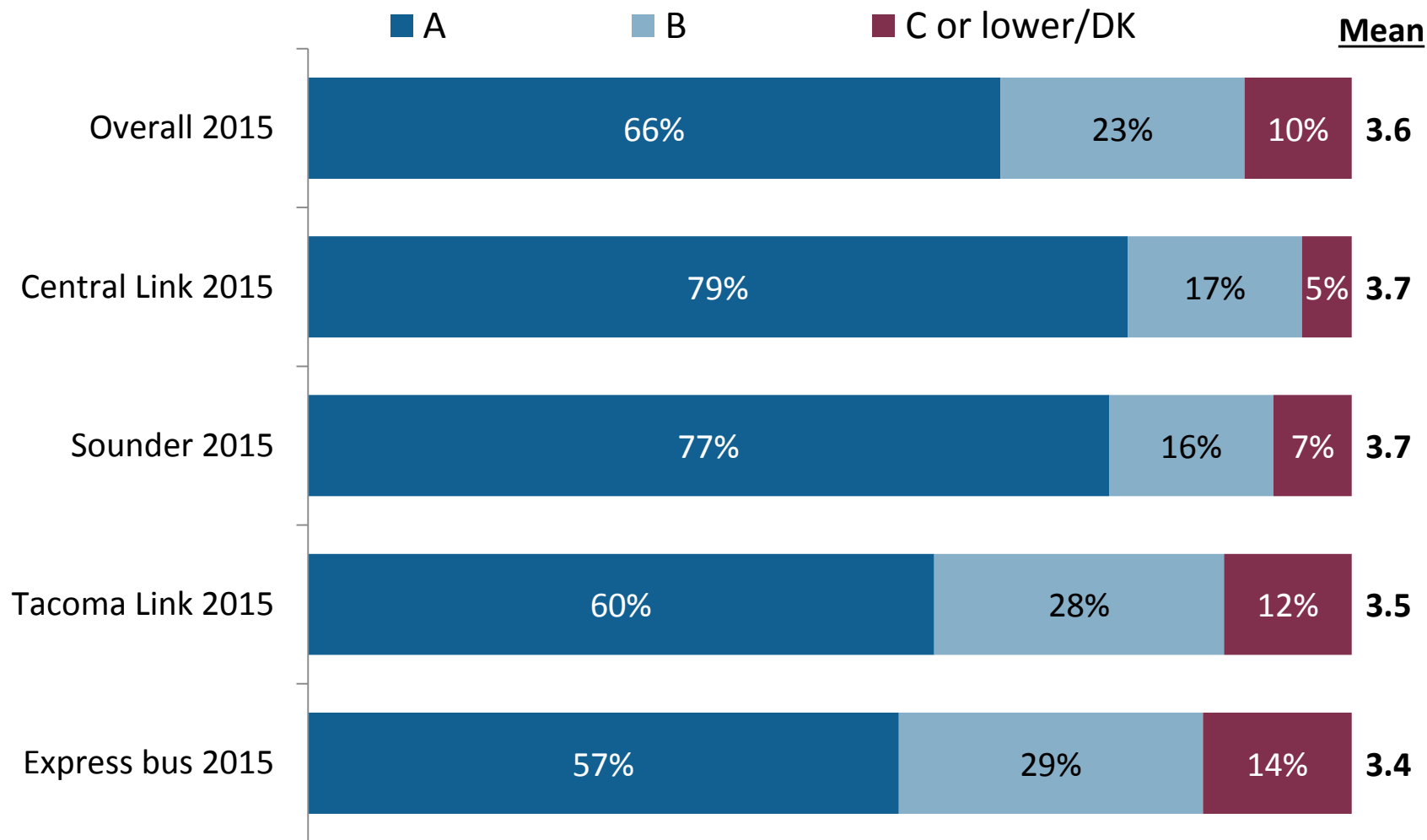
# Transit Center/Station Cleanliness Rating

*Station and transit center cleanliness ratings vary significantly by service. Tacoma Link and Express bus riders rate it the lowest, with over a fifth (22%+) rating transit center cleanliness below a B. A majority of Sounder (68%) and Central Link (61%) riders give TC/station cleanliness an A grade.*



# Physical Condition of Stops/Stations

*A strong majority of riders (66%) give the condition of stops and stations an A rating. Satisfaction is highest among Central Link and Sounder riders and lower for Express bus and Tacoma Link.*



# Cleanliness Issues

*Trash/garbage left behind on buses and Link -- and at stops and stations -- is the most common suggestion for improving cleanliness. Additionally, a handful of Tacoma Link riders cite odor/smells.*

Top Issues	Overall	Exp. Bus	Sounder South	Sounder North	Central Link	Tacoma Link
None/No Answer	65%	59%	75%	82%	73%	49%
Trash/litter/garbage (non-specific)	13%	15%	7%	8%	12%	23%
Trash at station/stop/transit center dirty	5%	8%	3%	5%	1%	10%
Dirty seats	3%	2%	1%	1%	3%	1%
Dirty/trashy floors/dirty bus floors	2%	3%	<1%	<1%	2%	2%
Odors/smells	2%	2%	3%	2%	2%	7%
Restrooms dirty/trashy/smelly	2%	2%	5%	1%	1%	<1%
Trash on bus/train	1%	1%	1%	<1%	1%	1%
Need more/larger trash cans/overflowing	1%	1%	2%	1%	<1%	1%
Homeless people/vagrants at stops	1%	1%	<1%	1%	1%	<1%
Smoking/people smoking	1%	1%	<1%	<1%	<1%	<1%
Bird droppings	<1%	1%	<1%	<1%	<1%	<1%
Need better lighting	<1%	<1%	<1%	<1%	<1%	<1%
All other	4%	5%	3%	<1%	3%	4%
Don't know	<1%	<1%	<1%	<1%	1%	1%

19A. What cleanliness issues have you noticed, either on-board or at the stops or stations, if any? (multiple responses; **first** response shown)



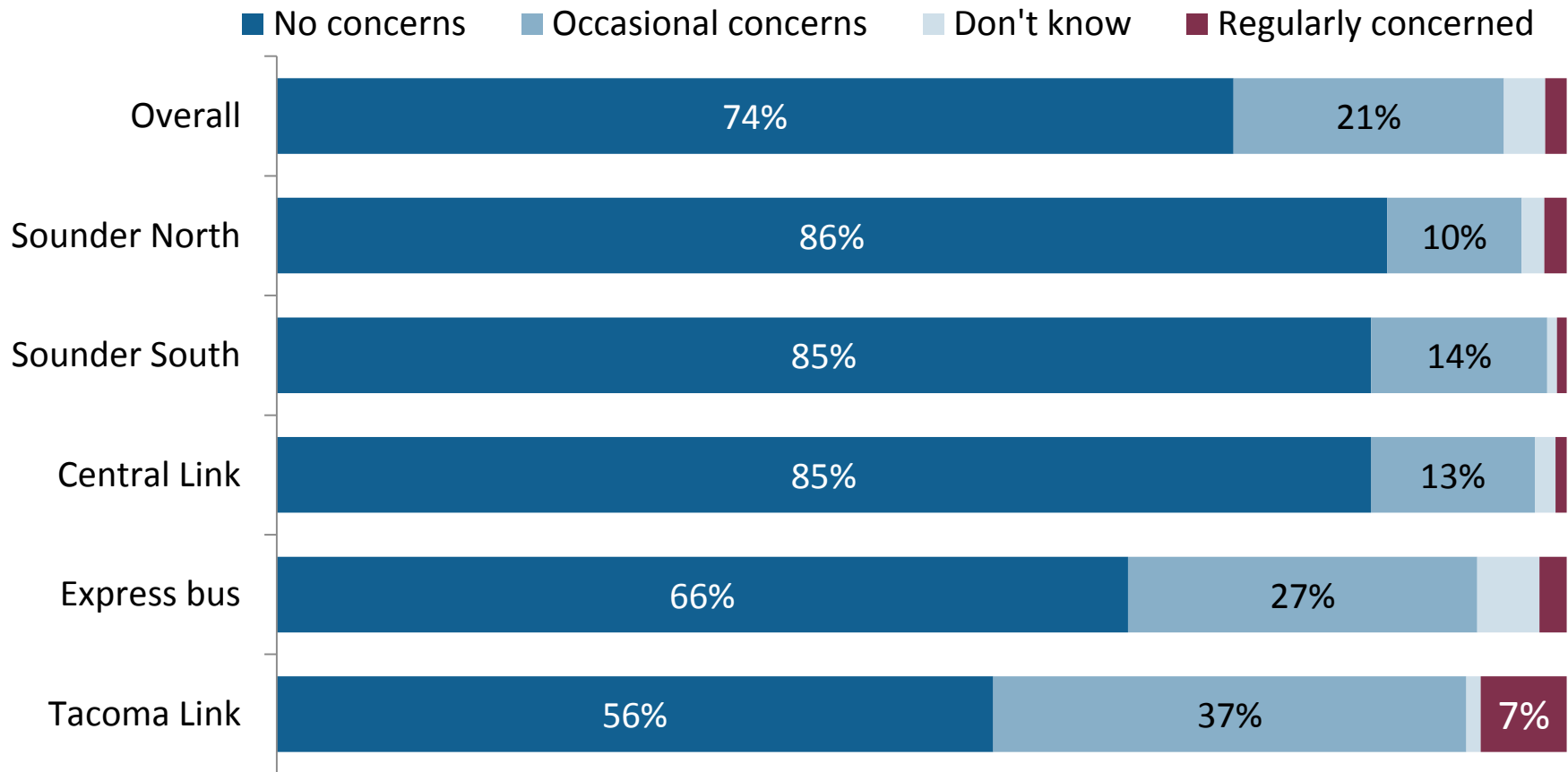
# Performance Attribute Ratings and Grades: Safety



# Safety at Stop/Station – by Service

*While a majority of riders have no safety concerns while waiting at stops/stations, about a third (37%) of Tacoma Link riders and a quarter (27%) of Express bus riders express concerns at least occasionally. A few Tacoma Link riders (7%) are regularly concerned for their safety.*

## Safety at Stop/Station



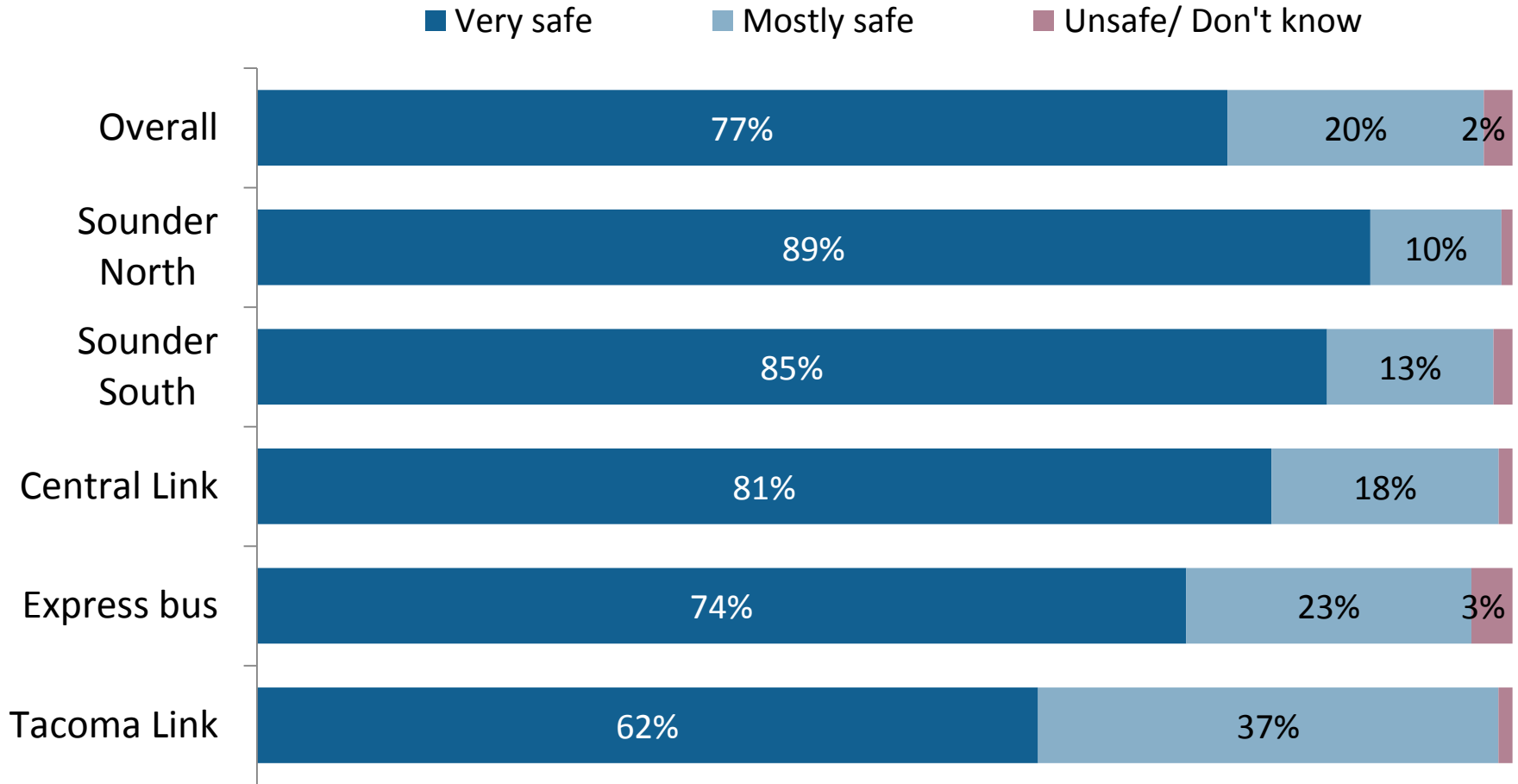
37. How would you rate your safety while waiting at the [stop/station] for [your bus/Light Rail/Sounder]?

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

# Safety On-board – by Service

*Most riders feel very safe while on-board ST's services, though these rates are lower among the quarter (23%) of Express bus and third (37%) of Tacoma Link riders who feel it is mostly safe.*

## Safety On-board



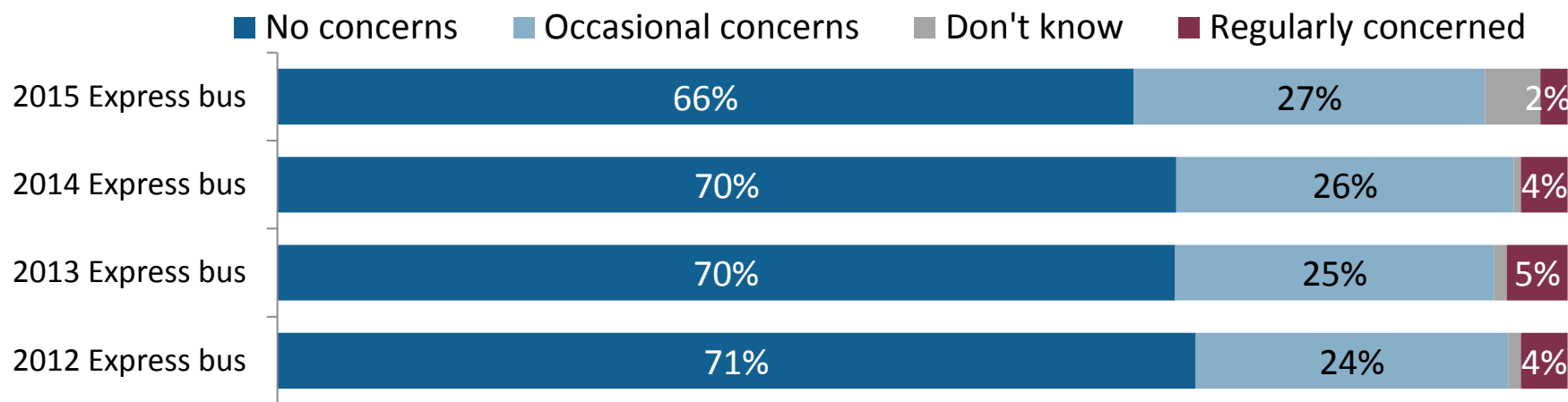
37. How would you rate your safety while waiting at the [stop/station] for [your bus/Light Rail/Sounder]?

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

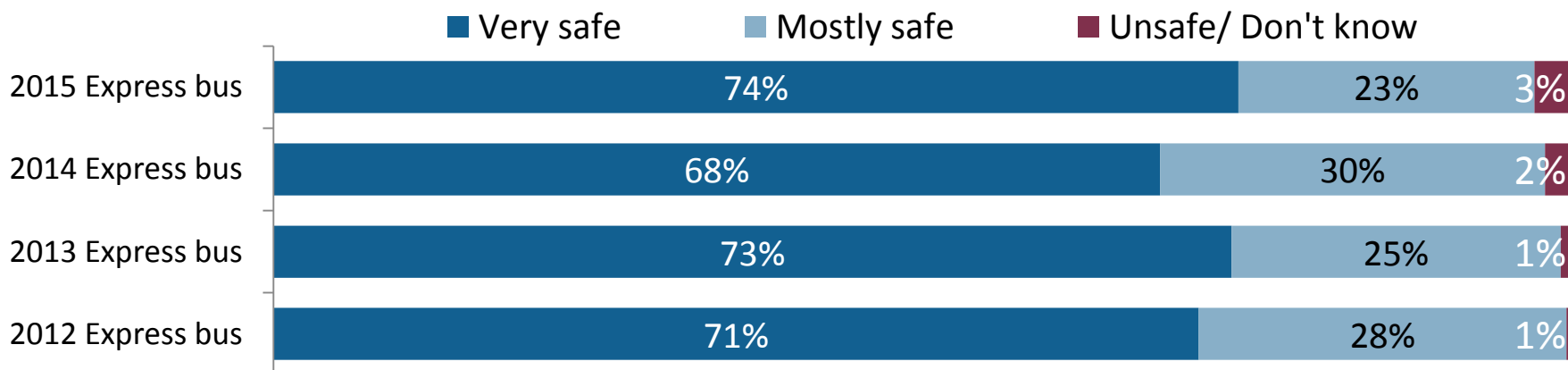
# Safety at Station/Onboard – Express Bus

*For Express bus riders, stop/station safety ratings have declined slightly from previous years while on-board safety ratings have rebounded from a dip in 2014.*

## Safety at Stop/Station



## Safety On-board



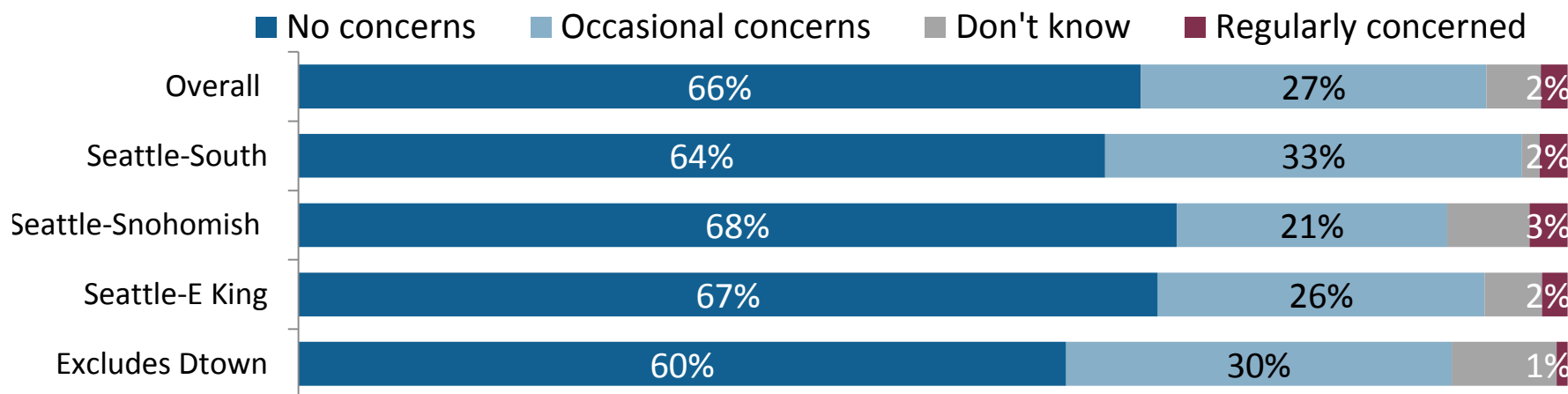
37. How would you rate your safety while waiting at the [stop/station] for [your bus/Light Rail/Sounder]?

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

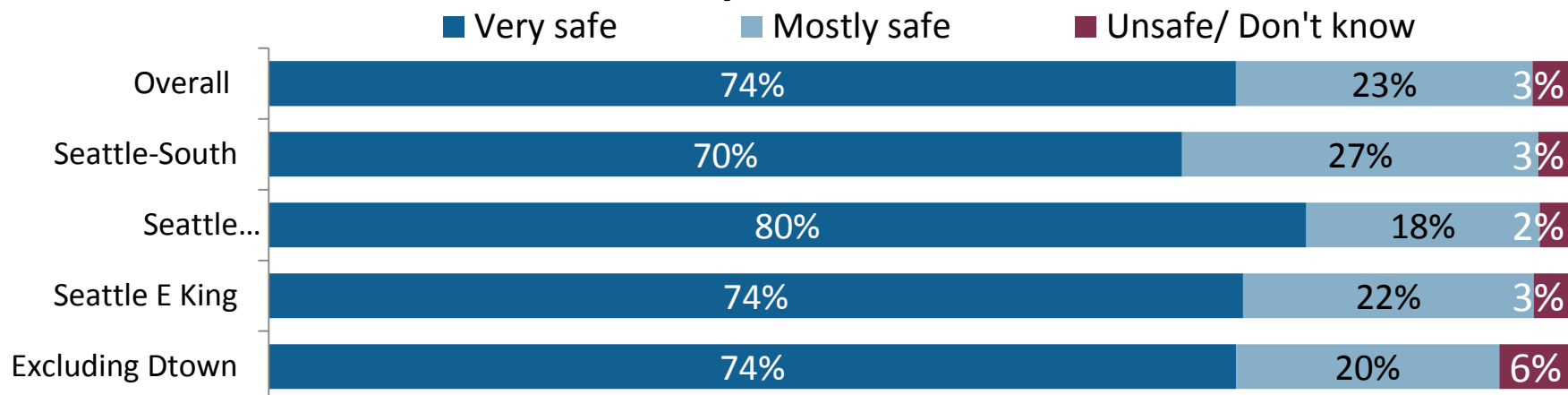
# Safety at Station/Onboard – Express Bus by Region

*Express bus safety ratings are generally high throughout the service area, though these ratings are slightly lower among riders on routes connecting Downtown and South King or Pierce.*

## Safety at Stop/Station



## Safety On-board



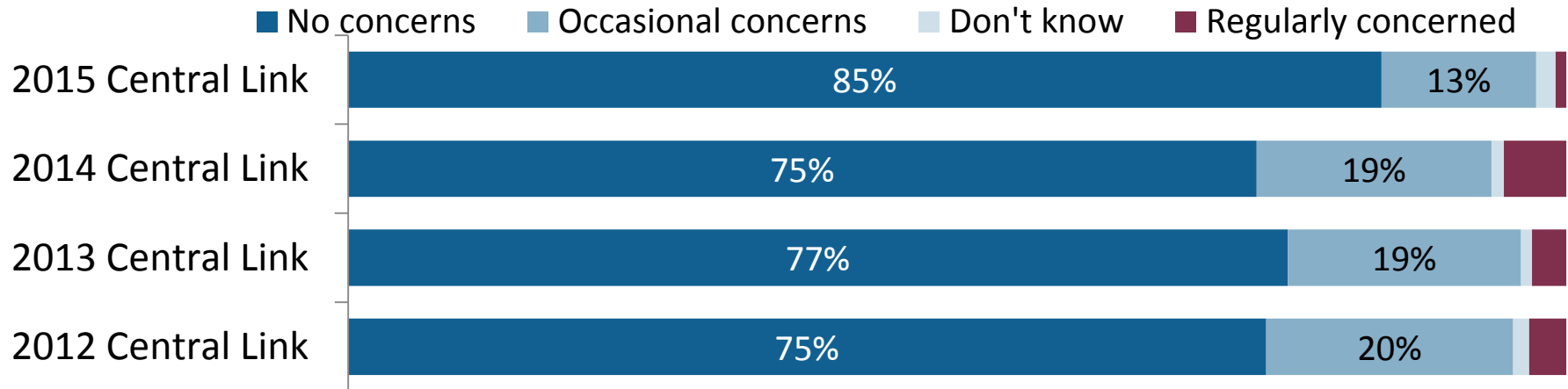
37. How would you rate your safety while waiting at the [stop/station] for [your bus/Light Rail/Sounder]?

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

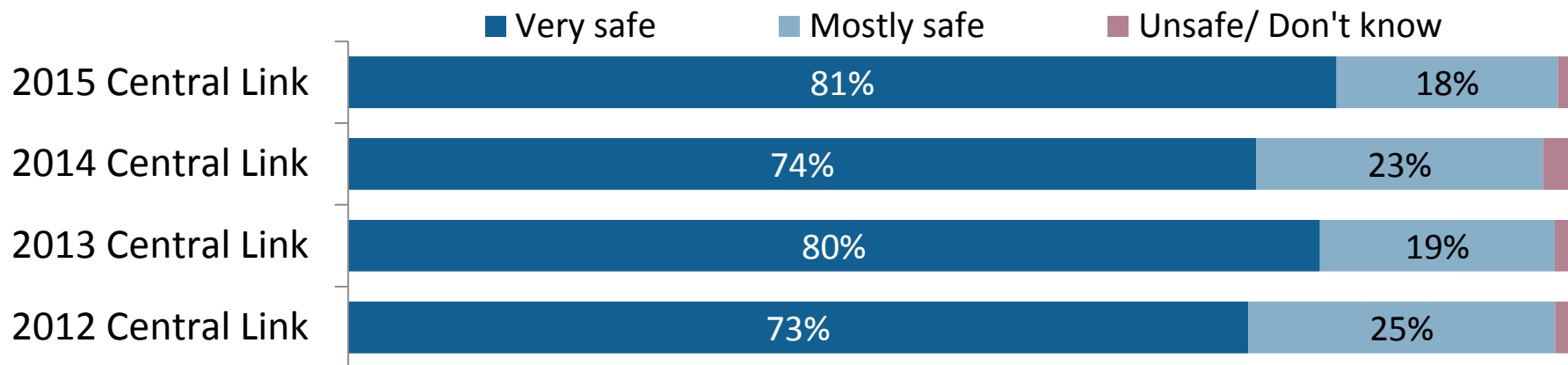
# Safety at Station/Onboard – Central Link

*Link safety ratings – both on-board and at the station – spiked in 2015 from previous years.*

## Safety at Station



## Safety On-Board



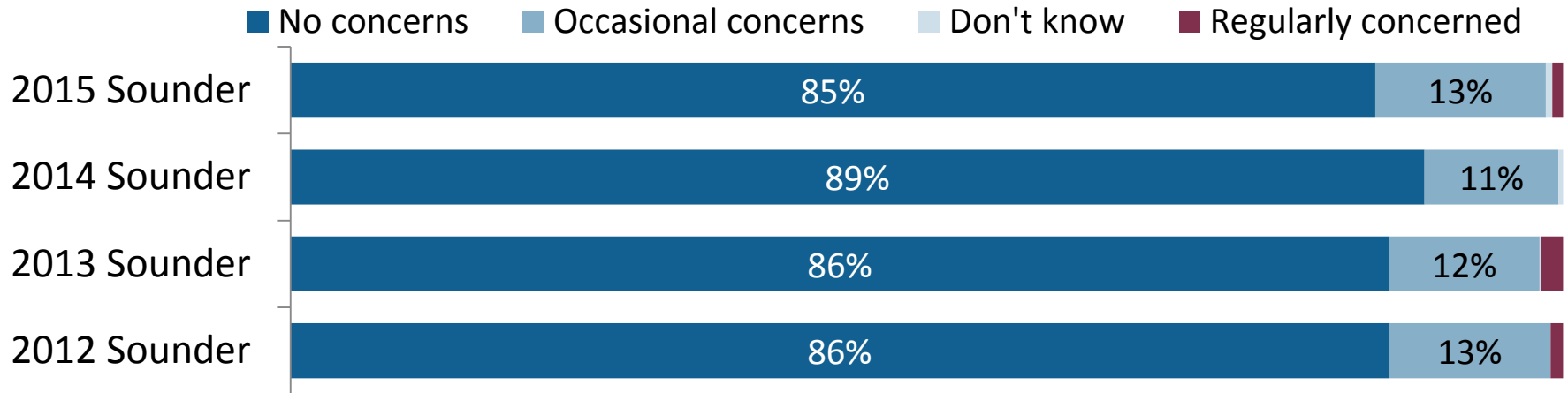
37. How would you rate your safety while waiting at the [stop/station] for [your bus/Light Rail/Sounder]?

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

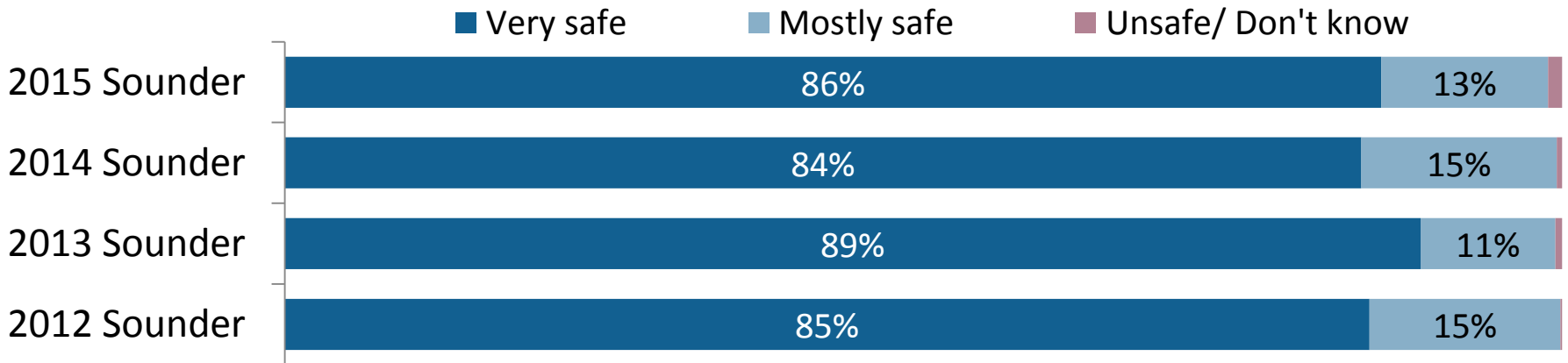
# Safety at Station/On-board - Sounder

*On-board and at-station safety ratings remain consistently high among Sounder riders.*

## Safety at Station



## Safety On-board



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

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

# Top-of-Mind Safety Issues

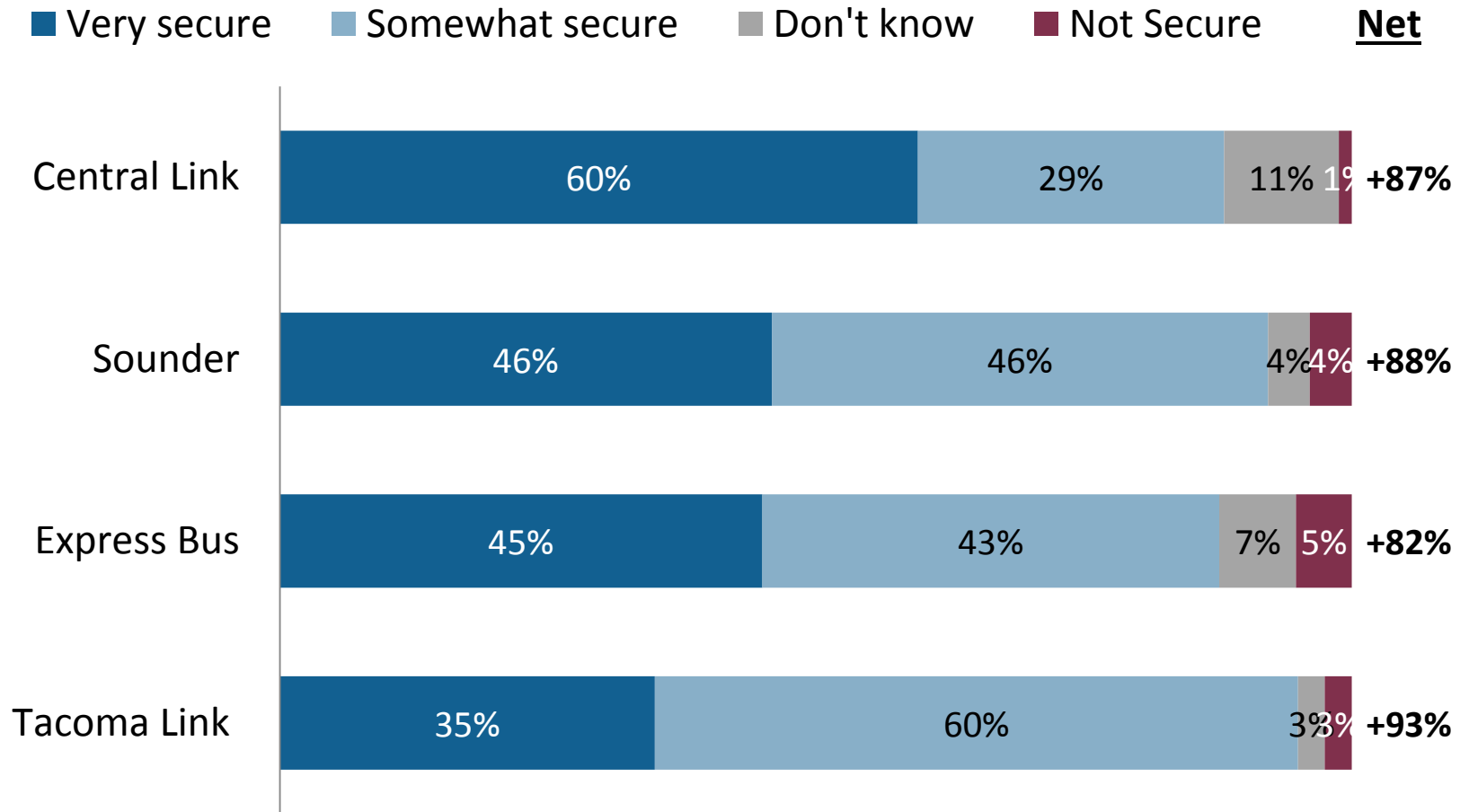
*While a strong majority of riders cite no top-of-mind safety issues, others are predominantly concerned with other passengers' behavior, particularly on Tacoma Link and Express bus.*

Top Reasons	Overall	Exp. Bus	Sounder South	Sounder North	Central Link	Tacoma Link
Weird/crazy people/suspicious people at station (some passengers scary)	8%	11%	5%	7%	5%	19%
Drunks/druggies	3%	5%	1%	1%	1%	2%
Angry/disruptive people/riders	2%	3%	<1%	1%	1%	3%
Overcrowding/people standing	2%	3%	<1%	1%	1%	2%
Uturns/abrupt stops/jerky driving	2%	3%	-	-	-	1%
Lack of lighting/dark stops/stops at night	2%	2%	1%	-	1%	1%
Driving skills/driving too fast/inexperienced drivers	2%	3%	<1%	-	-	-
People panhandling/begging	1%	2%	1%	1%	<1%	1%
Lack of security personnel/attendants	1%	1%	2%	1%	1%	3%
Parking lot/garage scary	<1%	<1%	-	1%	-	-
Other	6%	7%	9%	5%	5%	3%
Nothing/No Answer/Don't know	74%	66%	81%	83%	85%	64%

38A. What safety issues have you noticed, either on-board or at stops or stations, if any? (multiple responses; **first** response shown)

# Vehicle Security at Park & Ride – By Service

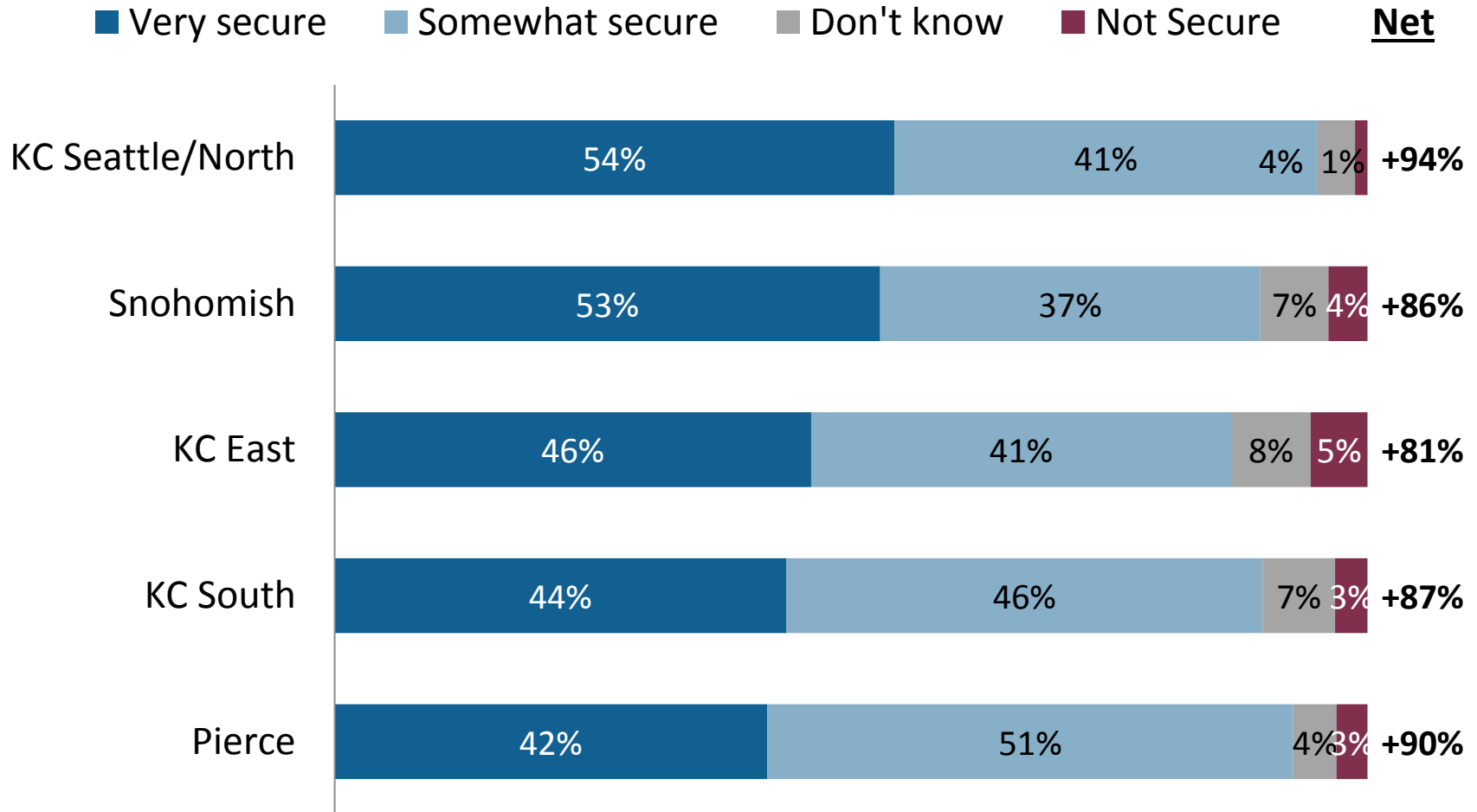
*Sounder and Express bus riders feel their vehicles are 'very secure' or 'somewhat secure' at P&Rs in roughly equal measure. About one-in-twenty do not feel their car is secure at a P&R.*





# Vehicle Security at Park & Ride – By Geography

*By geography, North King and Snohomish riders are most likely to feel that their vehicle is 'very safe' at a P&R. This sentiment is lower among riders in Pierce, South King and East King counties.*

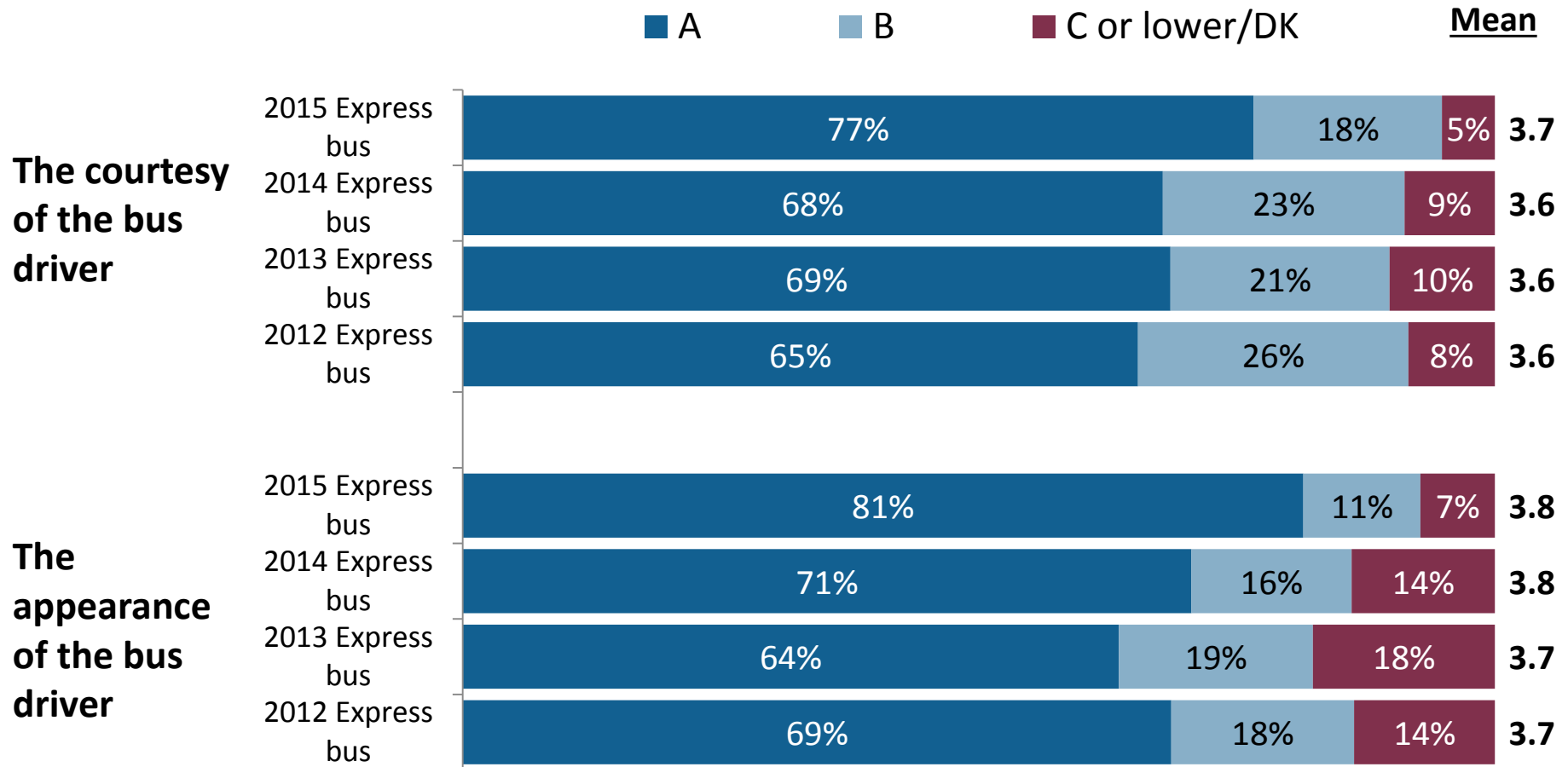




# Performance Attribute Ratings and Grades: Additional Attributes

# Express Bus Operator Ratings

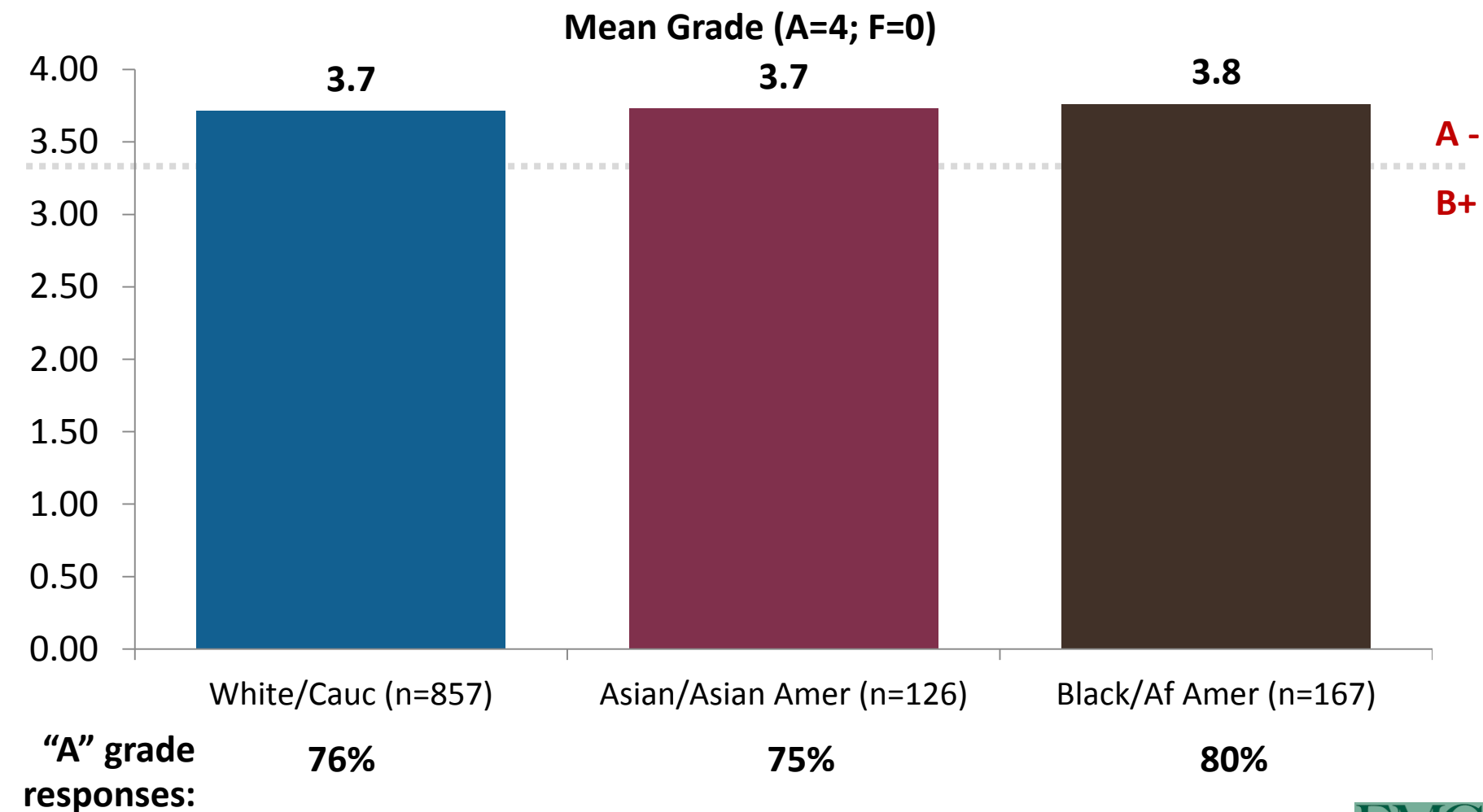
*Satisfaction ratings for the courtesy and appearance of Express bus operators are the highest they've been in recent years, with over three-quarters of riders (77%+) giving each an A grade.*



20-21. Using a scale of **A** through **F**, where **A** means **excellent** and **C** means **average**, and **F** means **failing**, how would you grade the following? (n=562)

# Bus Driver Courtesy by Rider Ethnicity

*Driver courtesy ratings do not vary significantly by ethnicity. At least three quarters (75%-80%) of riders give bus drivers an A for courtesy.*

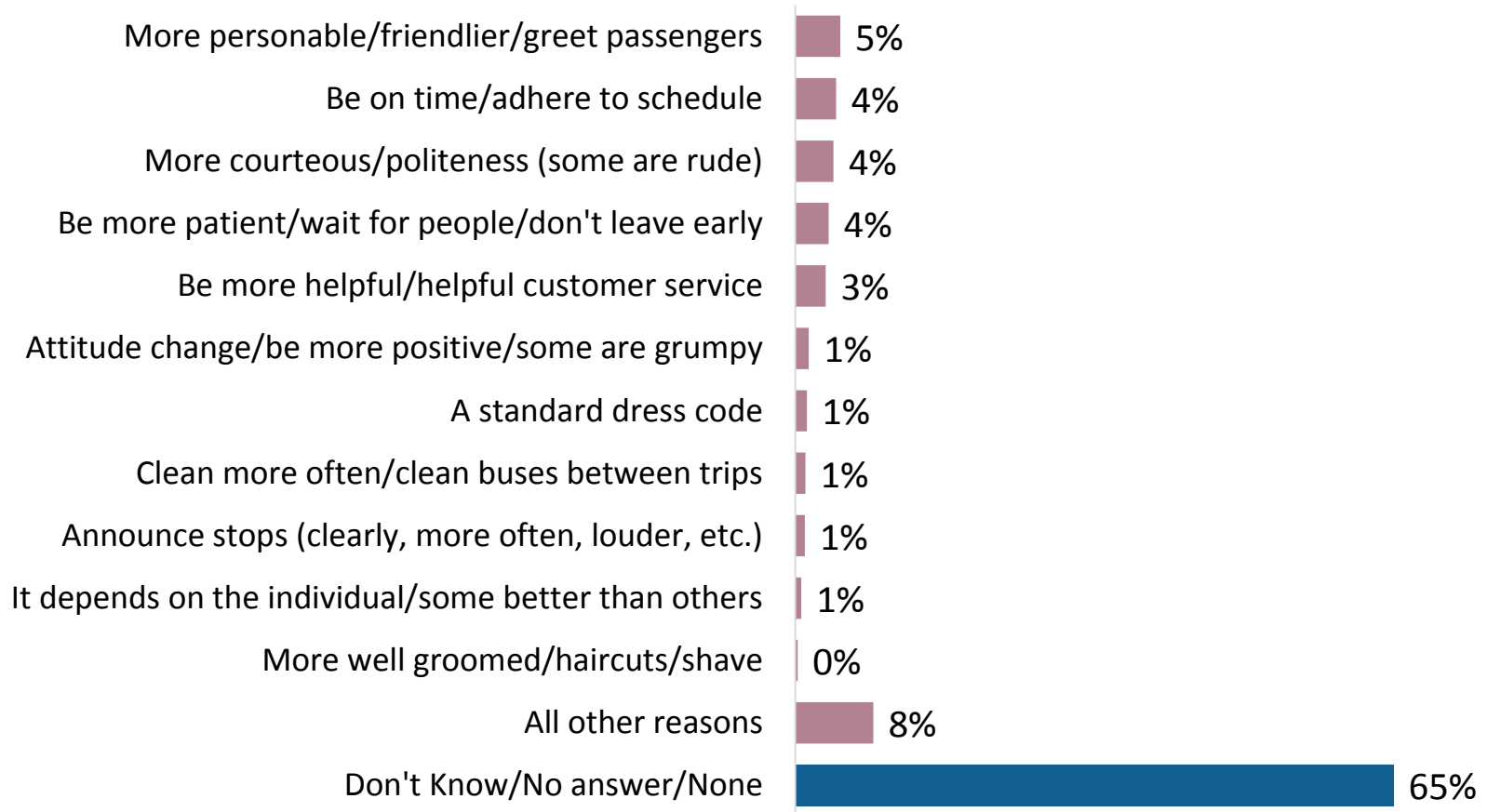


20. Using the same scale, what grade would you give to the **courtesy** of the bus driver?

# Improving Bus Operator Grades

*No particular suggestions stand out among Express bus riders as ways operators can improve the service they provide.*

## Express bus riders



22. What could bus drivers do to improve the grades you gave? (multiple responses;  
first response shown)

# Express Bus Performance Attributes – by Route Region

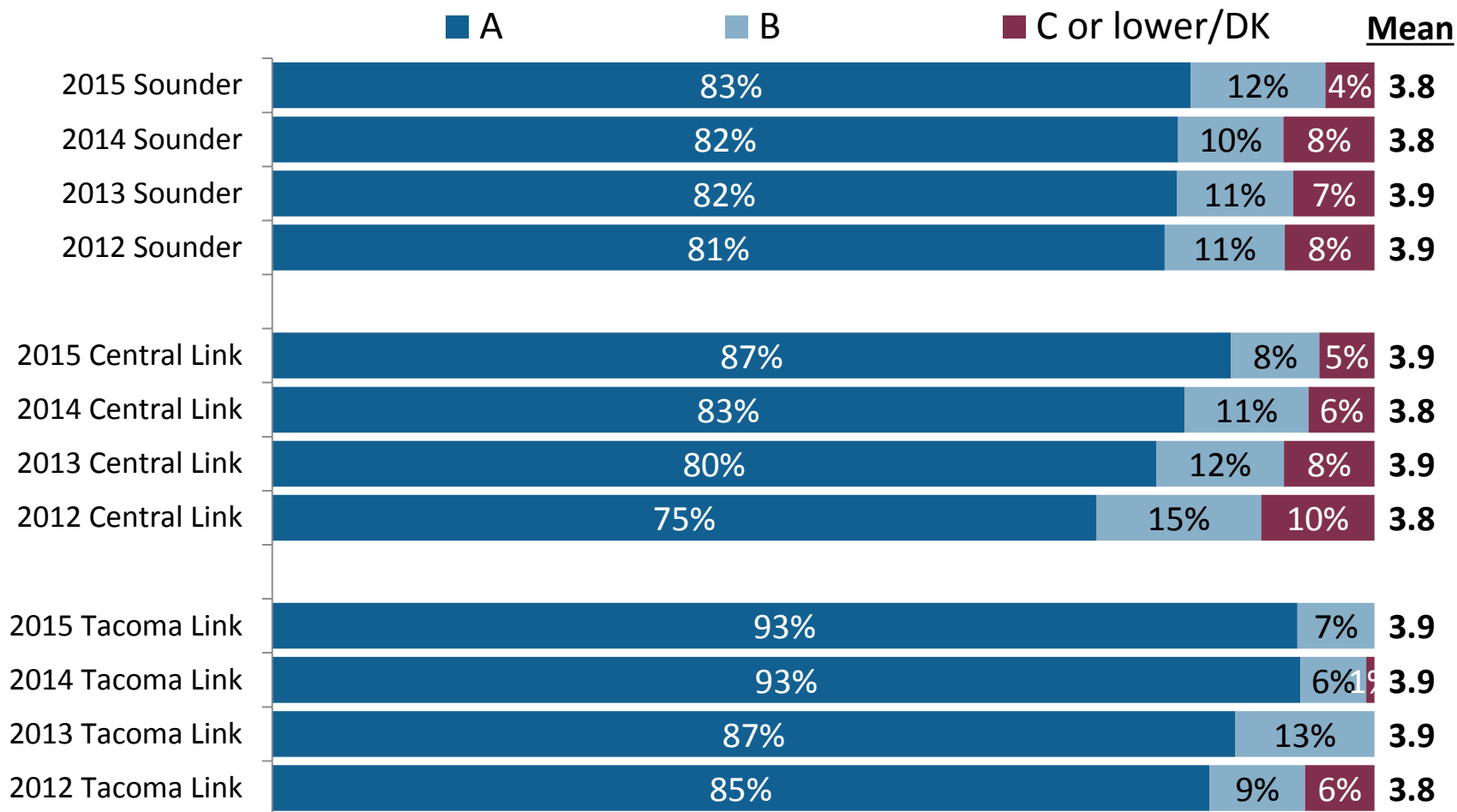
*Express bus routes in Seattle-South King/Pierce perform lower on several rider satisfaction attributes, including on-board and station cleanliness, total travel time and on-time performance.*

## Mean Grade (A=4; F=0)

Attribute	All Express bus riders	Seattle-South (566/567, 574, 577/578, 586, 590-595)	Seattle-Snohomish (510-513)	Seattle-E King (522, 540, 542, 545, 550, 554, 555, 560)	Route Excludes Downtown Seattle (532, 535, 556)
<i>Number of interviews (n)</i>	<i>562n</i>	<i>133n</i>	<i>78n</i>	<i>285n</i>	<i>66n</i>
5. Overall grade	3.3 (B+)	3.1 (B-)	3.3 (B)	3.4 (B+)	3.3 (B)
18. the average cleanliness of the bus cabin	3.6 (B+)	3.4 (B+)	3.7 (A-)	3.6 (B+)	3.6 (B+)
19. the average cleanliness of transit centers/stations	3.2 (B)	3.0 (B-)	3.2 (B)	3.3 (B)	3.4 (B+)
20. the courtesy of the bus driver?	3.7 (B+)	3.8 (A-)	3.7 (B+)	3.7 (B+)	3.7 (A-)
21. the appearance of the bus driver?	3.8 (A-)	3.8 (A-)	3.8 (A-)	3.8 (A-)	3.9 (A-)
24. the physical condition of the stops?	3.4 (B)	3.3 (B)	3.4 (B+)	3.5 (B+)	3.5 (B+)
27. satisfaction with the total travel time	3.4 (B+)	3.0 (B-)	3.4 (B+)	3.6 (B+)	3.3 (B)
28. on-time performance	3.3 (B)	3.1 (B-)	3.3 (B)	3.4 (B)	3.2 (B)

# Train Conductor Rating

*Satisfaction with operators across all rail services remains high and consistent with previous years. Grades for Central Link operators have steadily increased since 2012.*

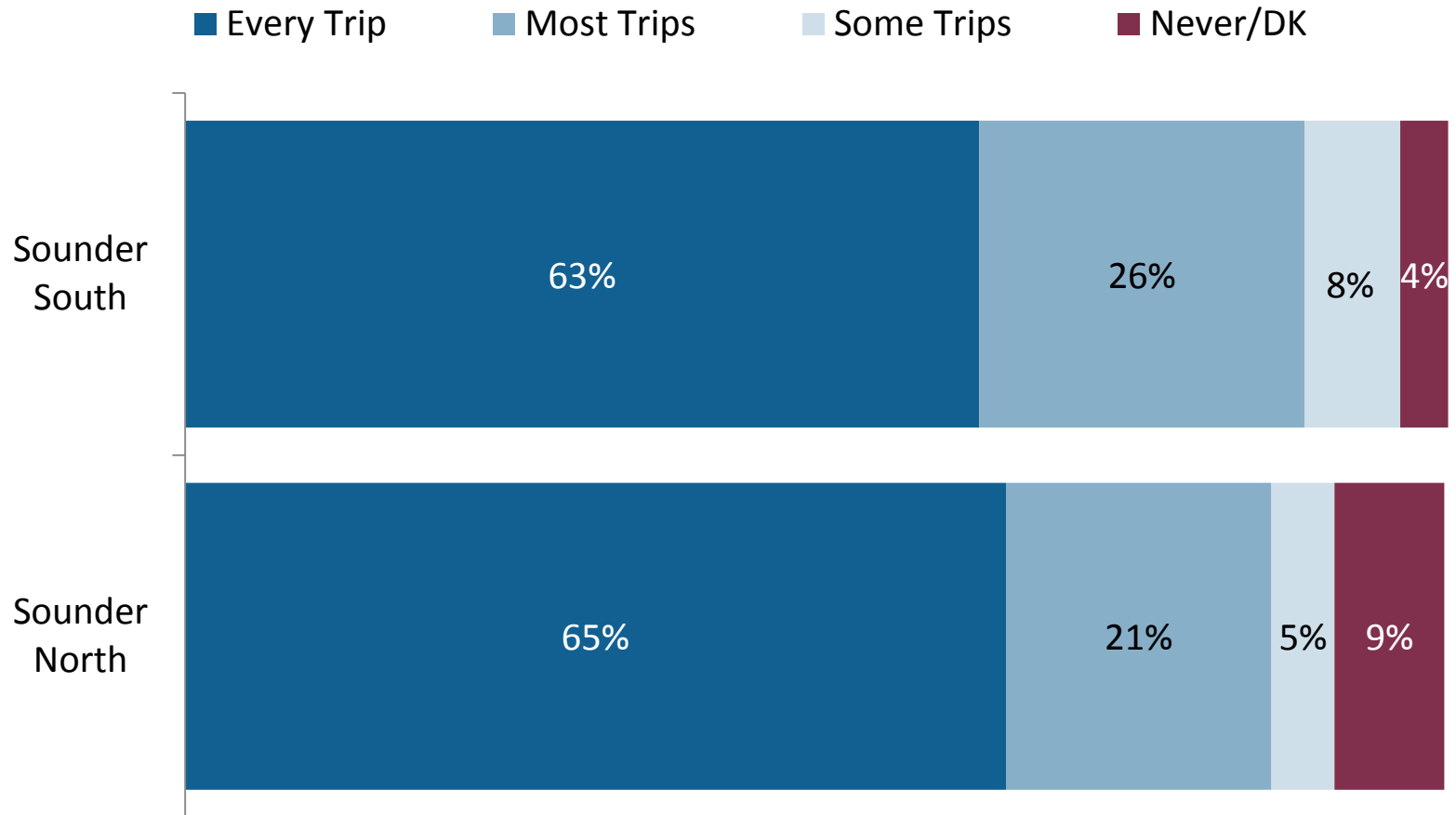


23. Using a scale of **A** through **F**, where **A** means **excellent** and **C** means **average**, and **F** means **failing**, how would you grade the following the job the train operator is doing?

# Sounder Station Staff

*A majority of Sounder riders see Sounder staff at stations at least most of the time.*

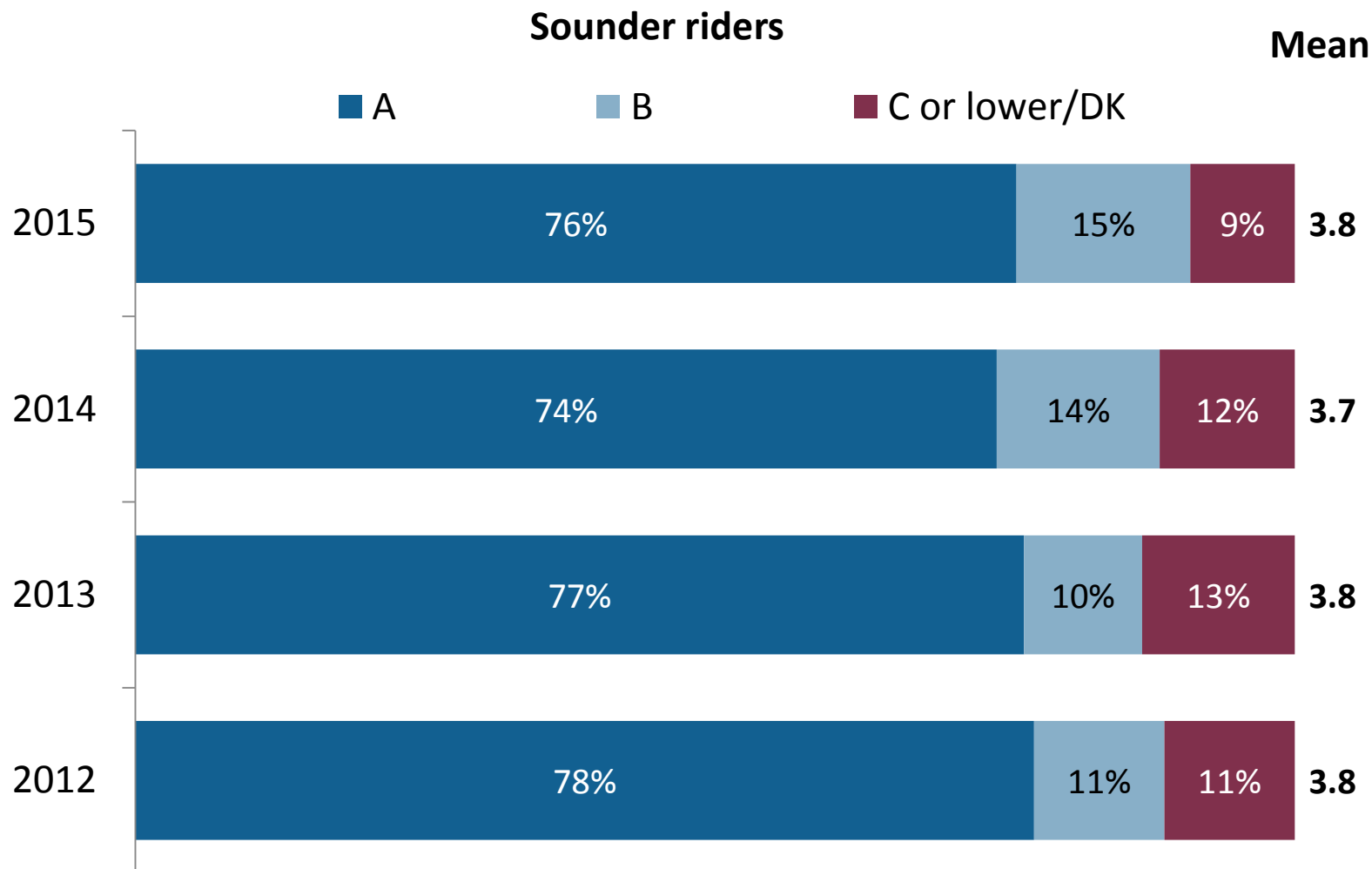
## Sounder riders





# Sounder Station Agents

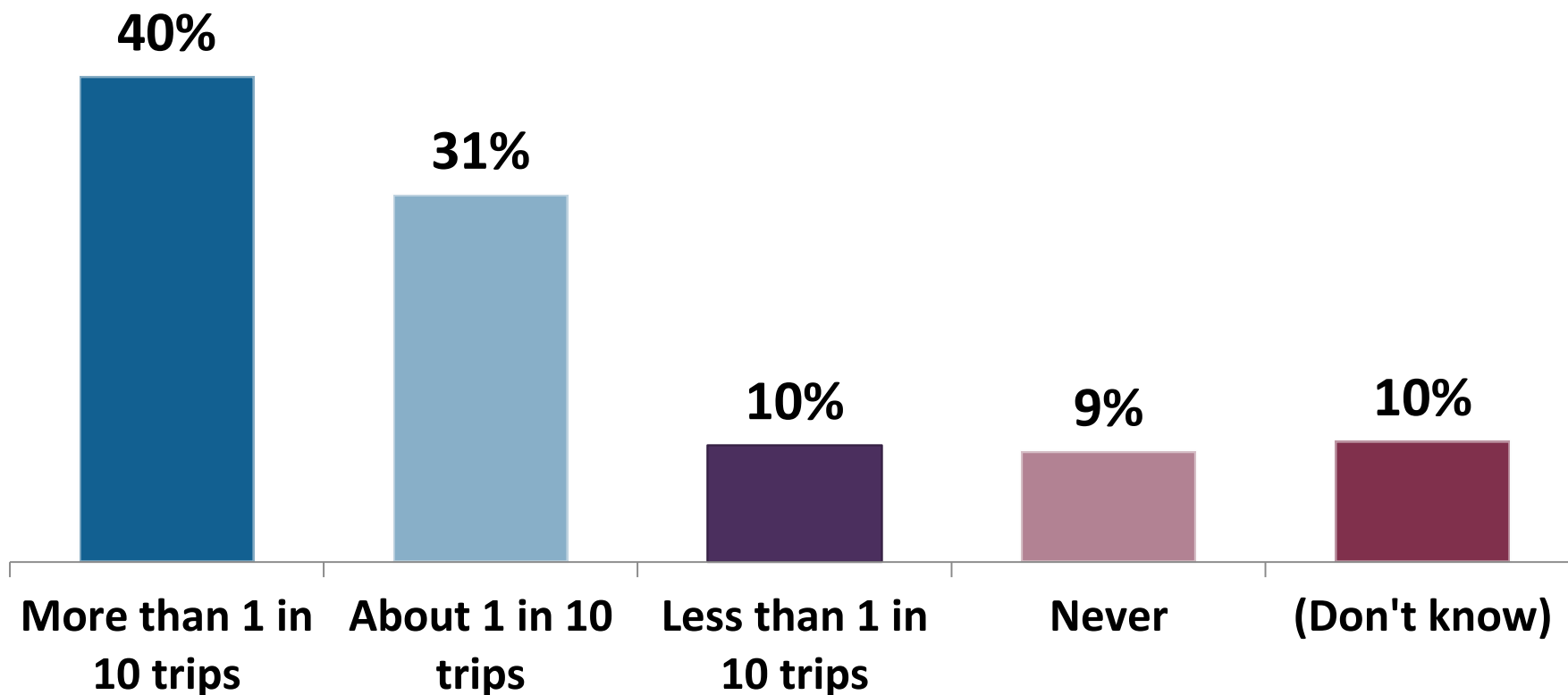
*Most riders give Station Agents an A grade, which is consistent with previous years.*



# Light Rail Fare Inspectors

*A strong majority (71%) of passengers report seeing a fare inspector on at least 1 in 10 trips.*

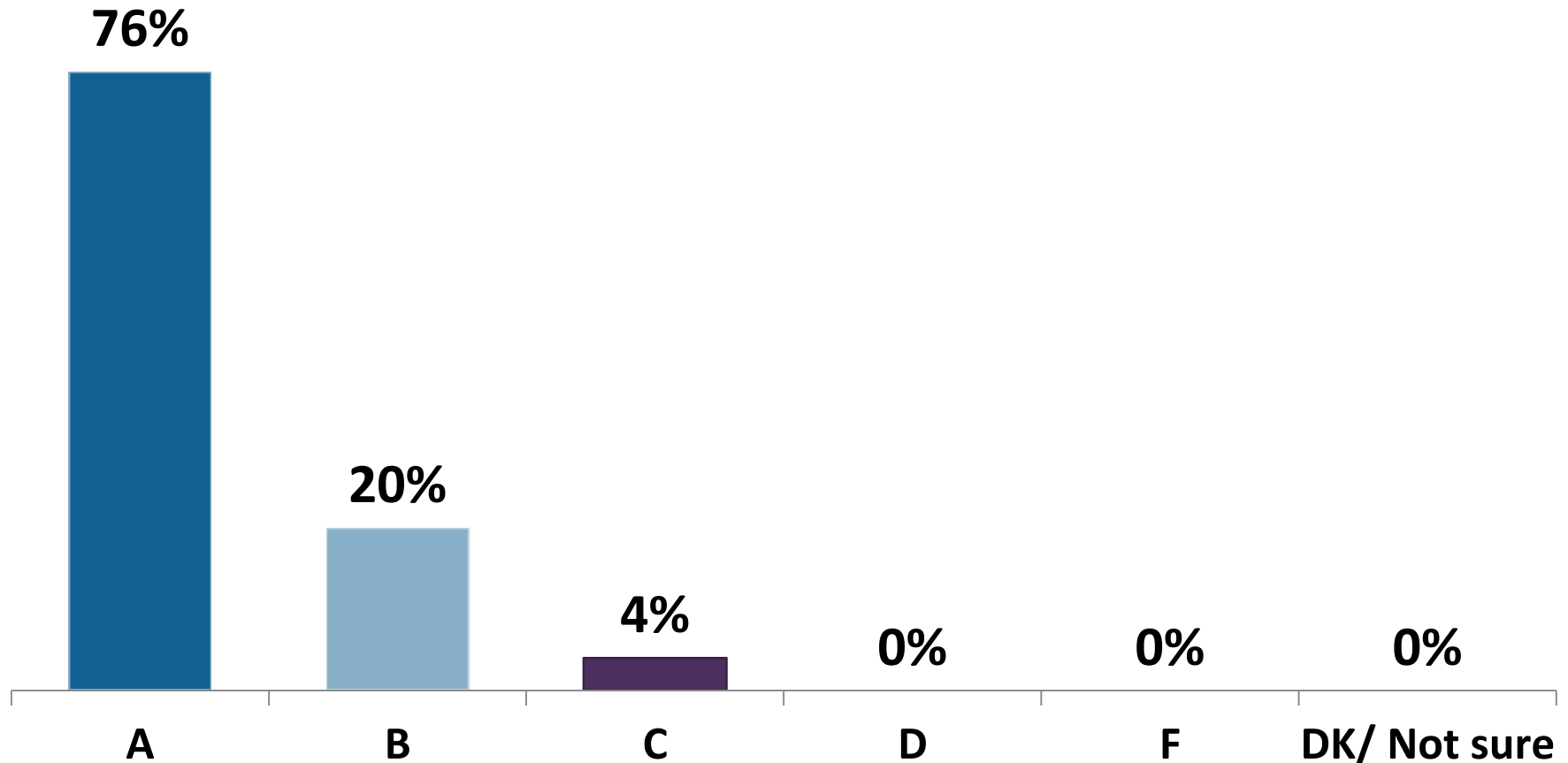
## Central Link riders



# Smoothness of the Ride – Central Link

*Three-quarters (76%) of Link riders rate the smoothness of the ride as an A. No respondents rated this attribute below a C grade.*

## Central Link riders



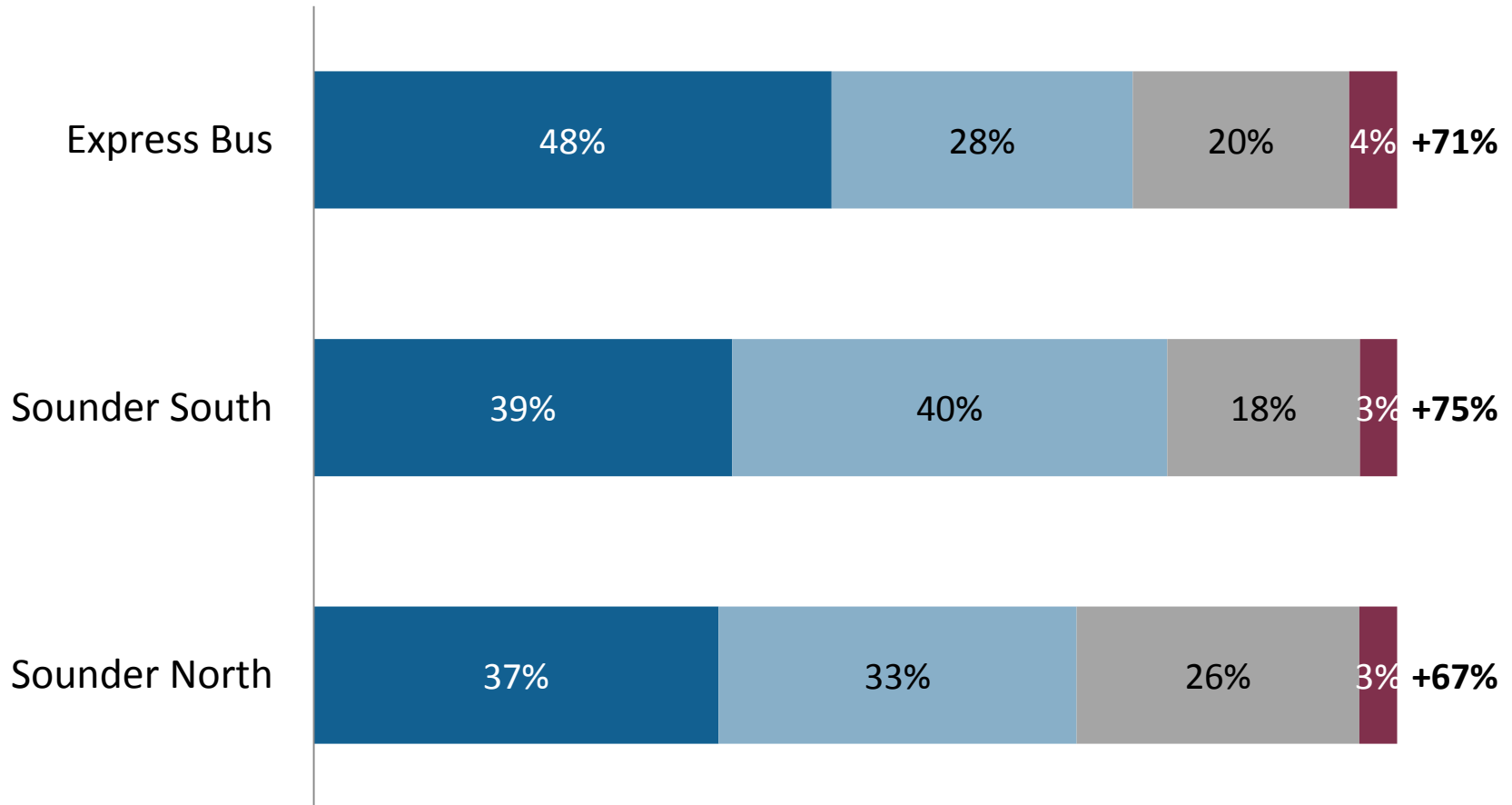


# Ease of Use

# Signs at Stops & Stations – By Service

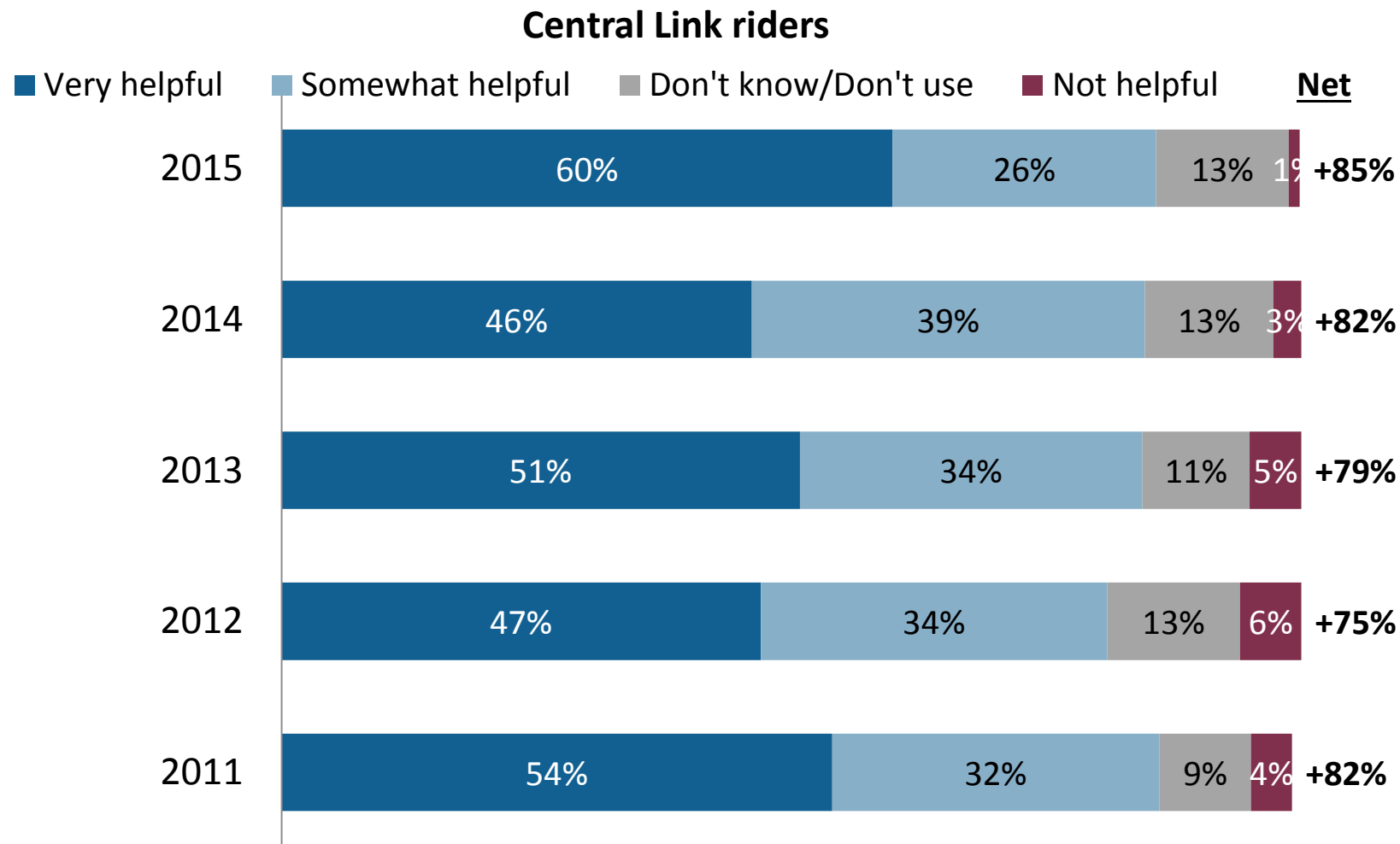
*Most ST riders believe the signs posted at stops and signs are at least somewhat helpful. Intensity is highest among Express bus riders, where a near-majority (48%) say the signs are 'very helpful.'*

■ Very helpful ■ Somewhat helpful ■ Don't know/Don't use ■ Not helpful **Net**



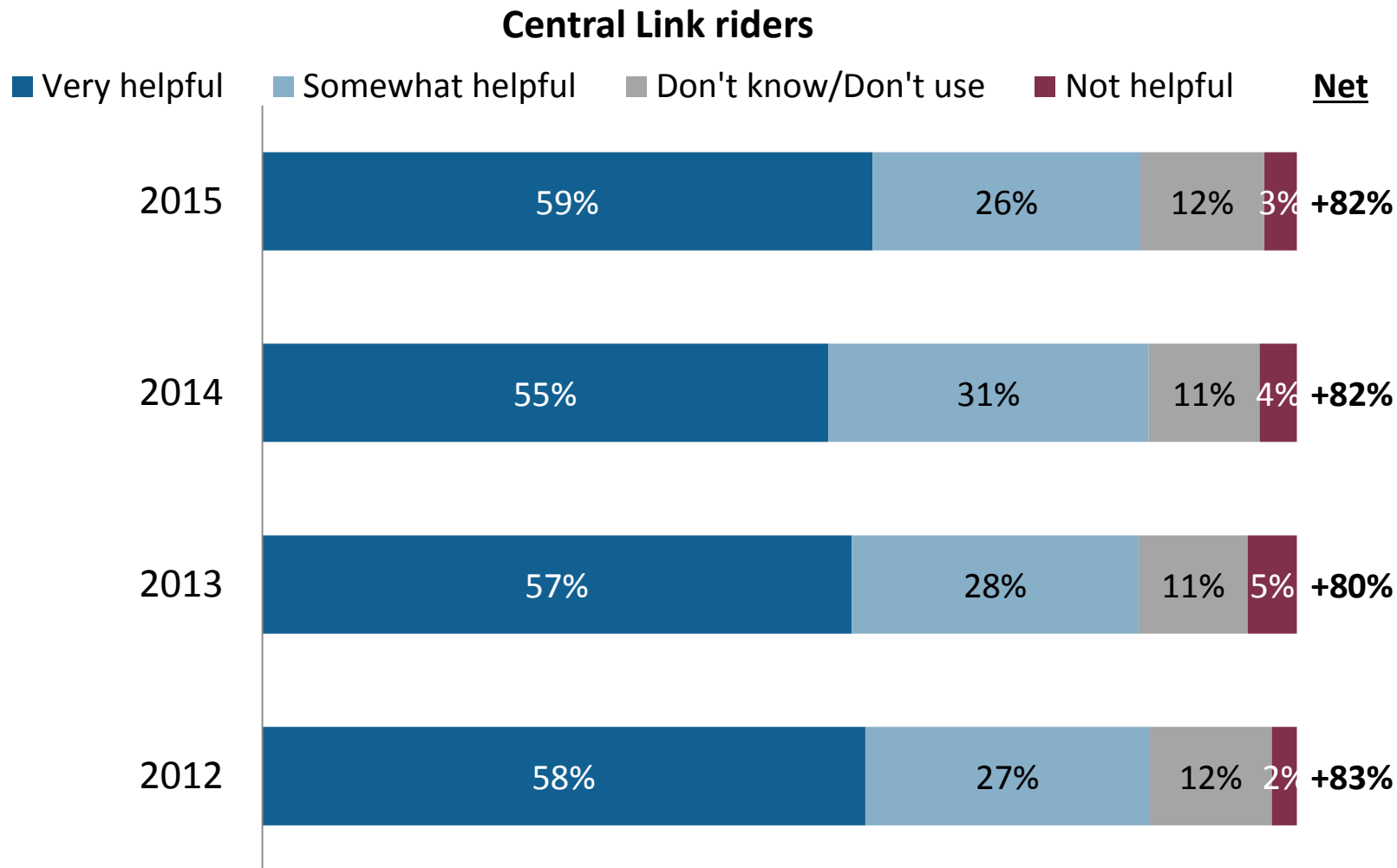
# Public Announcements – Central Link

*Most Central Link Light rail riders find the public announcements at the station to be helpful. This portion is higher in 2015 than it has been in other years.*



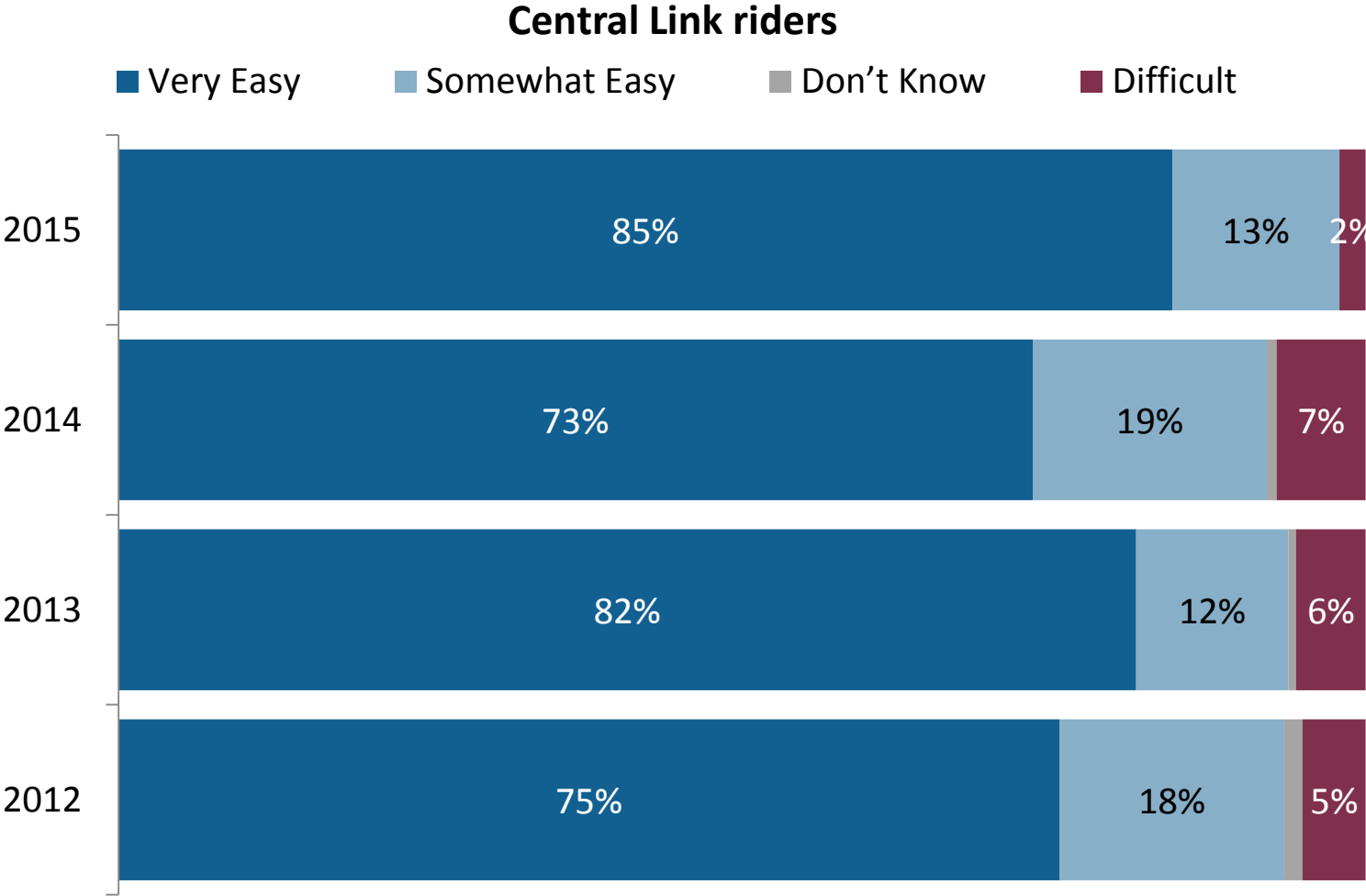
# Electronic Message Boards – Central Link

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



# Ease of Payment – Central Link Light Rail

*Few Central Link Light rail riders have issues paying their fare.*



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



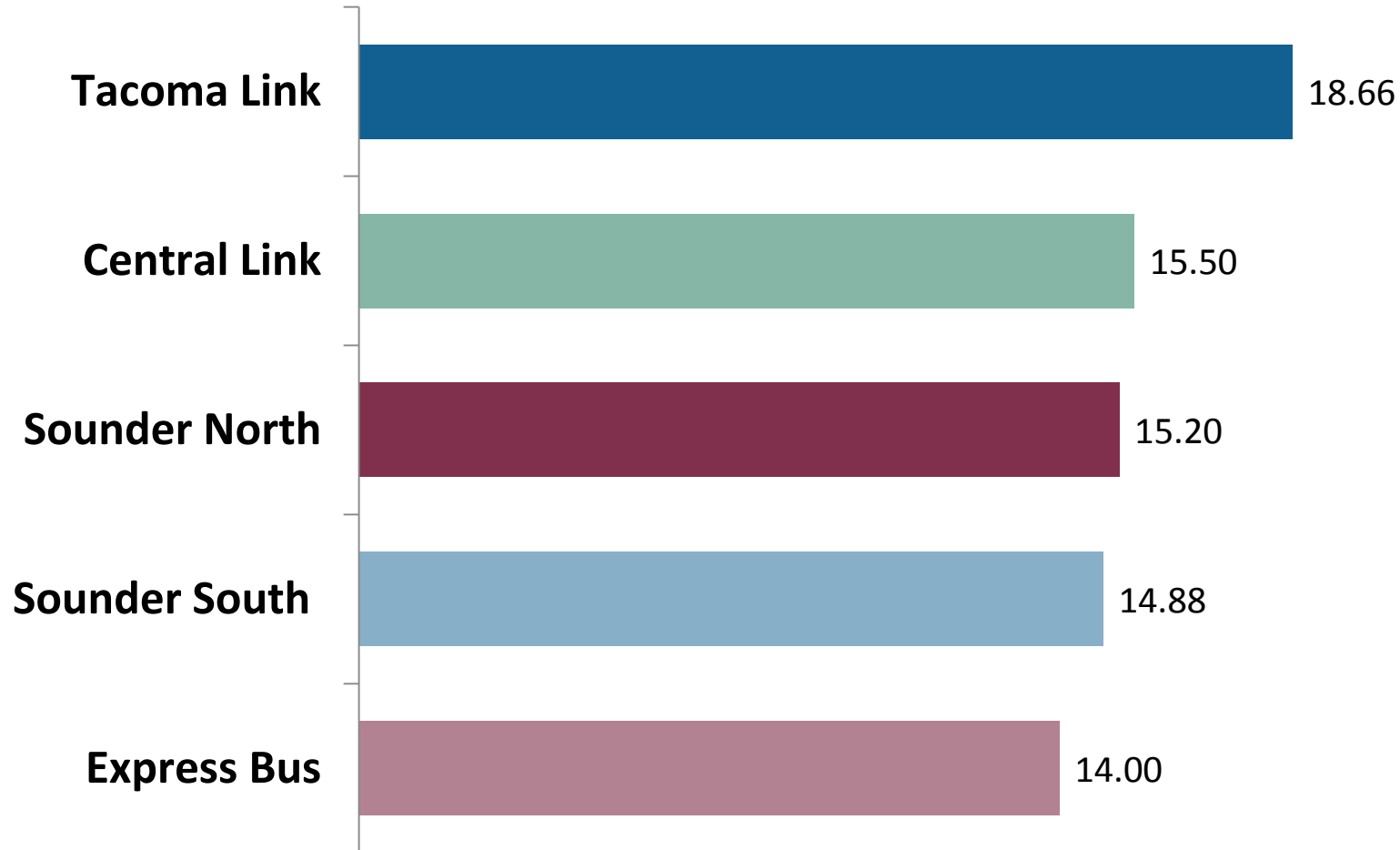


# Commute Behavior

# Average Time to Stop/Station

*For most ST riders, it takes an average of 14-16 minutes to get to the first transit stop they use. While highest for Tacoma Link (over 18 min), these times are fairly consistent for riders on all ST services.*

**Mean number of minutes to stop/station**

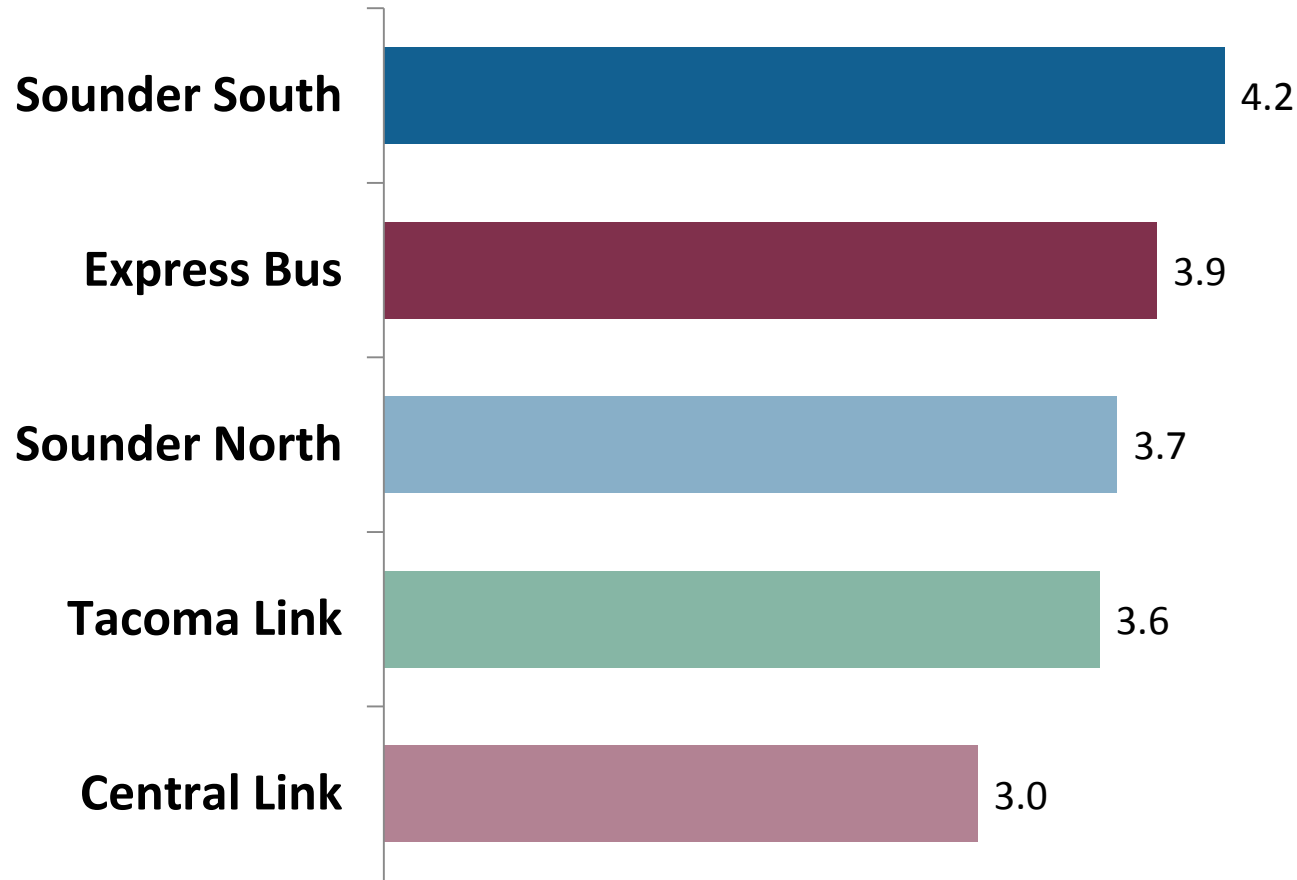


9. How many minutes does it typically take to get from your home to the first transit stop you usually use?

# Frequency of Trip

*On average, Sounder South riders use ST the most frequently of all services (4.2 days/week).  
Central Link has the least-frequent ridership (3 days/week).*

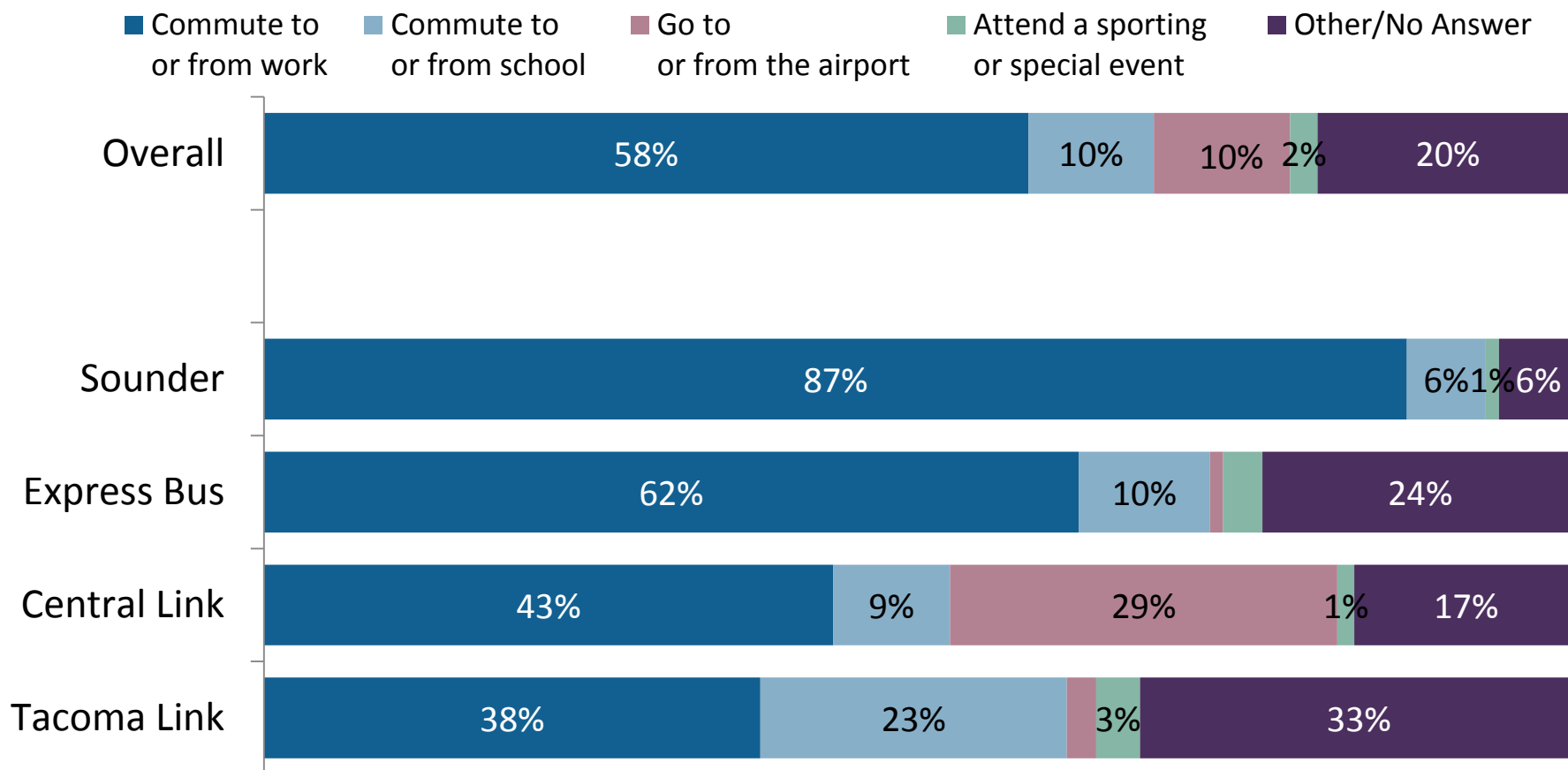
**Mean number of days per week**



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

# Trip Purpose

*Sounder riders almost exclusively use it for work commute trips. Nearly a third (29%) of Central Link riders use Link to go to the airport and about a quarter of Tacoma Link riders make school trips.*



# Riding ST Instead of Other Modes

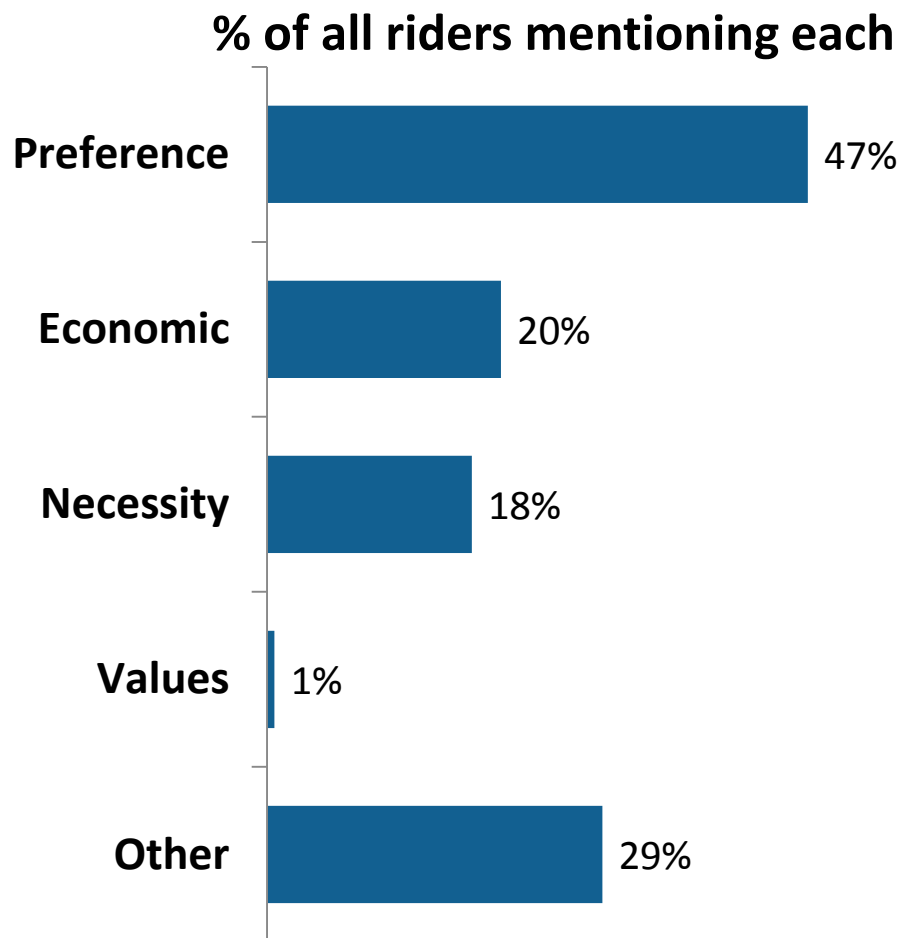
*Express bus and Link riders are more likely to rely on the service because it's cheaper or they have no car. Sounder riders are primarily drawn to ST because it is fast/avoids traffic and convenient.*

Top Reasons	Overall	Exp. Bus	Sounder South	Sounder North	Central Link	Tacoma Link
No car	23%	27%	6%	13%	23%	8%
Cheaper	22%	20%	12%	6%	29%	30%
Faster/avoids traffic	18%	17%	38%	32%	13%	6%
More convenient	16%	16%	14%	23%	18%	27%
No parking	7%	7%	6%	5%	6%	19%
Work/school pays	4%	4%	9%	10%	3%	--
Less stressful	2%	2%	3%	1%	2%	--
More relaxing	1%	1%	5%	3%	<1%	--
Gas prices	1%	1%	2%	--	<1%	--
Reduces cars on the road	1%	1%	1%	--	1%	--
Helps environment	1%	1%	--	3%	<1%	--
Other	3%	2%	4%	3%	3%	11%

14. What are the main reasons you use this ST Express Bus/Sounder/Link Light Rail/Tacoma Link Light Rail instead of getting to your destination some other way? (multiple responses; **first** response shown)

# Reasons for Riding - Aggregated

*Almost half (47%) of all ST riders began riding the service for preference-related reasons.*



17. What are the main reasons you **originally started riding** Express Bus/Link/Sounder? (Multiple responses)

# Reasons for Riding - Specific

*Convenience/ease of reaching destination is the top factor convincing riders to ride ST, followed by job/situation changes, cost and lacking a car.*

Top mentions - Initial	Overall	Express Bus	Sounder	Central Link	Tacoma Link
More convenient	16%	15%	12%	18%	22%
Changed-new job/job transfer/relocated	13%	14%	25%	8%	<1%
Goes to destination	11%	11%	7%	13%	18%
Cheaper	11%	10%	6%	14%	18%
No car/only option	10%	14%	5%	6%	6%
Faster	8%	6%	15%	8%	9%
Less stressful (avoid traffic)	4%	6%	3%	2%	3%
No parking	4%	6%	2%	2%	2%
Work/school pays	4%	4%	5%	4%	<1%
Don't want to drive	2%	3%	2%	1%	2%
Gas prices	2%	2%	2%	2%	<1%
Just started school/college	1%	1%	1%	2%	4%
Other/don't know	14%	9%	14%	21%	16%

17. What are the main reasons you **originally started** riding Sounder/Express Bus/Central Link light rail/Tacoma Link light rail? (multiple responses; **first** response shown)

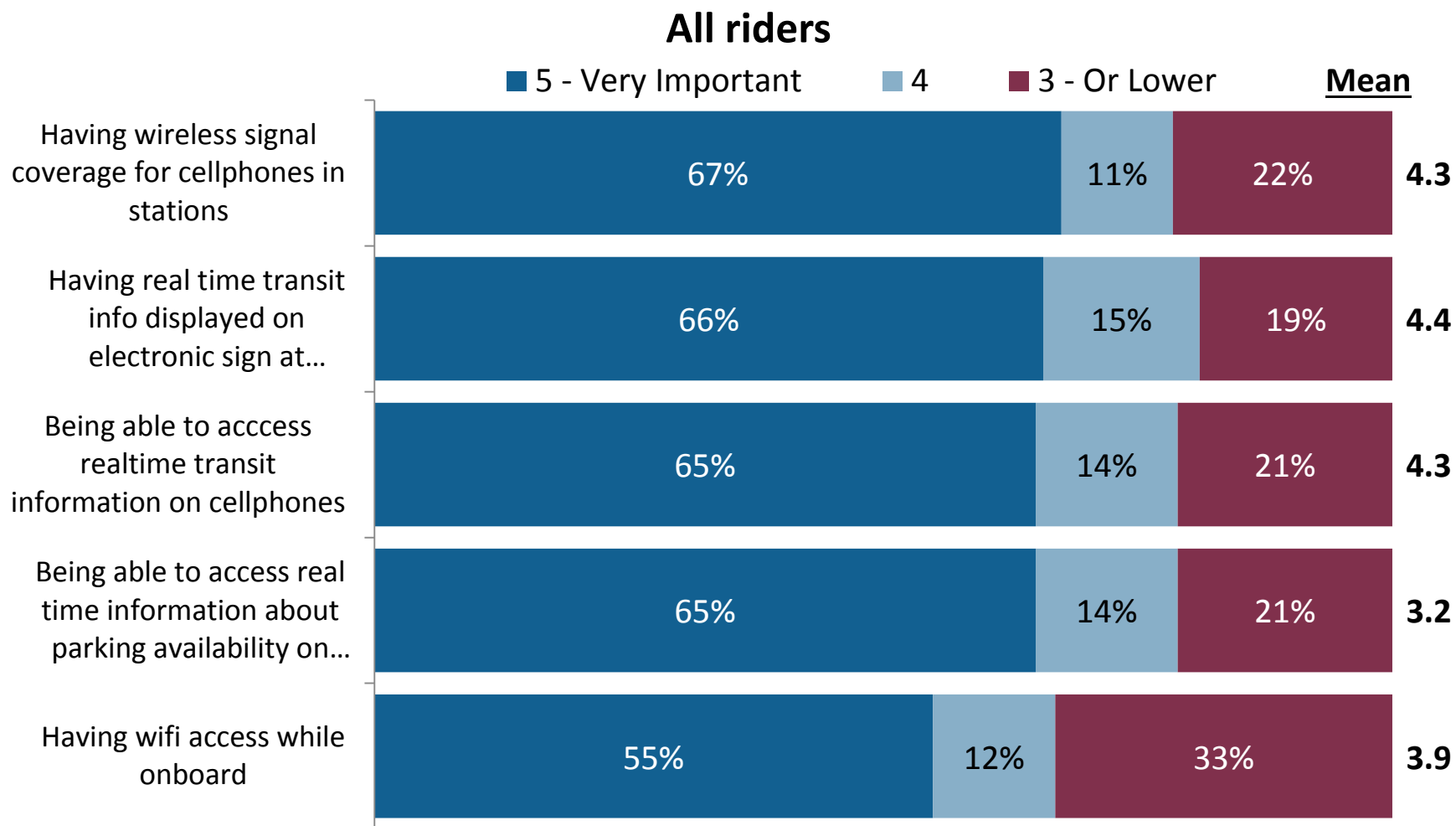


# Technology and Sound Transit



# Importance of Technology Onboard or at Stations

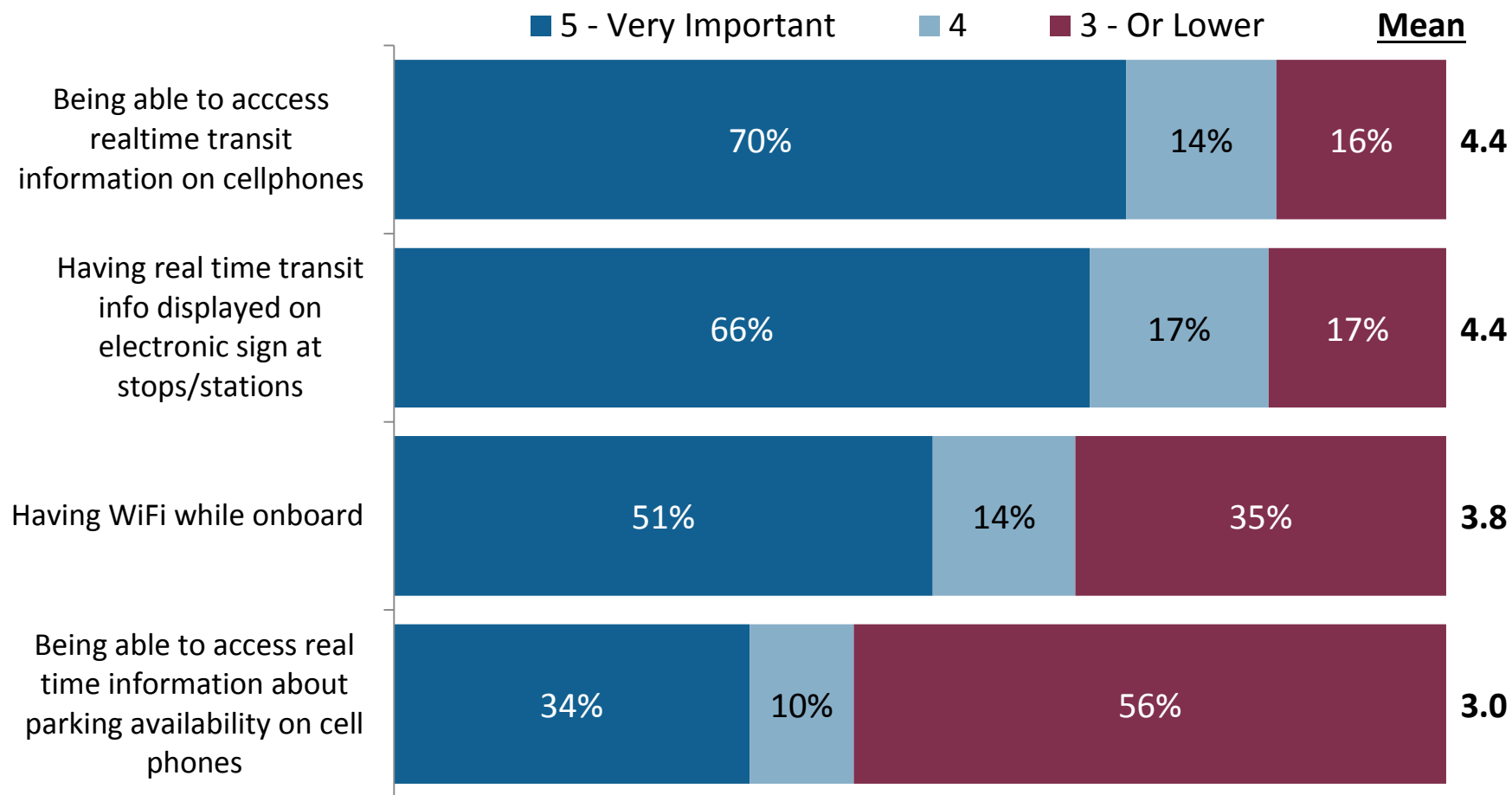
*There is comparably high demand for most tech amenities among ST riders, systemwide.*



40-44. Using a scale of 1 through 5, where 1 means not at all important and 5 means very important, how important would you rate which of the following ...

# Importance of Technology Onboard or at Stations - Bus

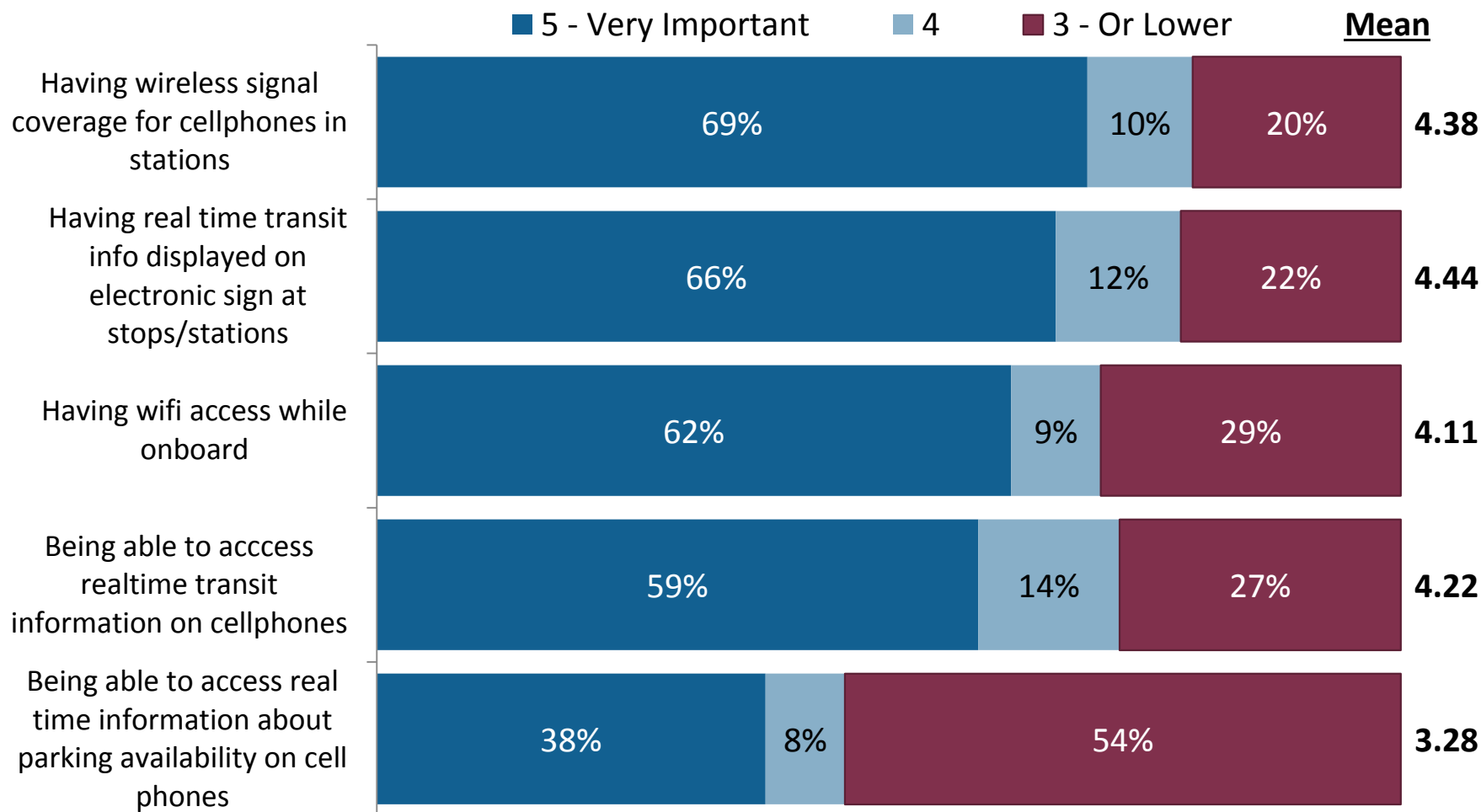
*Being able to access real-time transit info and updates – either via mobile or at stops/stations -- is the most important amenity to Express bus riders.*



40-44. Using a scale of 1 through 5, where 1 means not at all important and 5 means very important, how important would you rate which of the following ...

# Importance of Technology Onboard or at Stations – Central Link

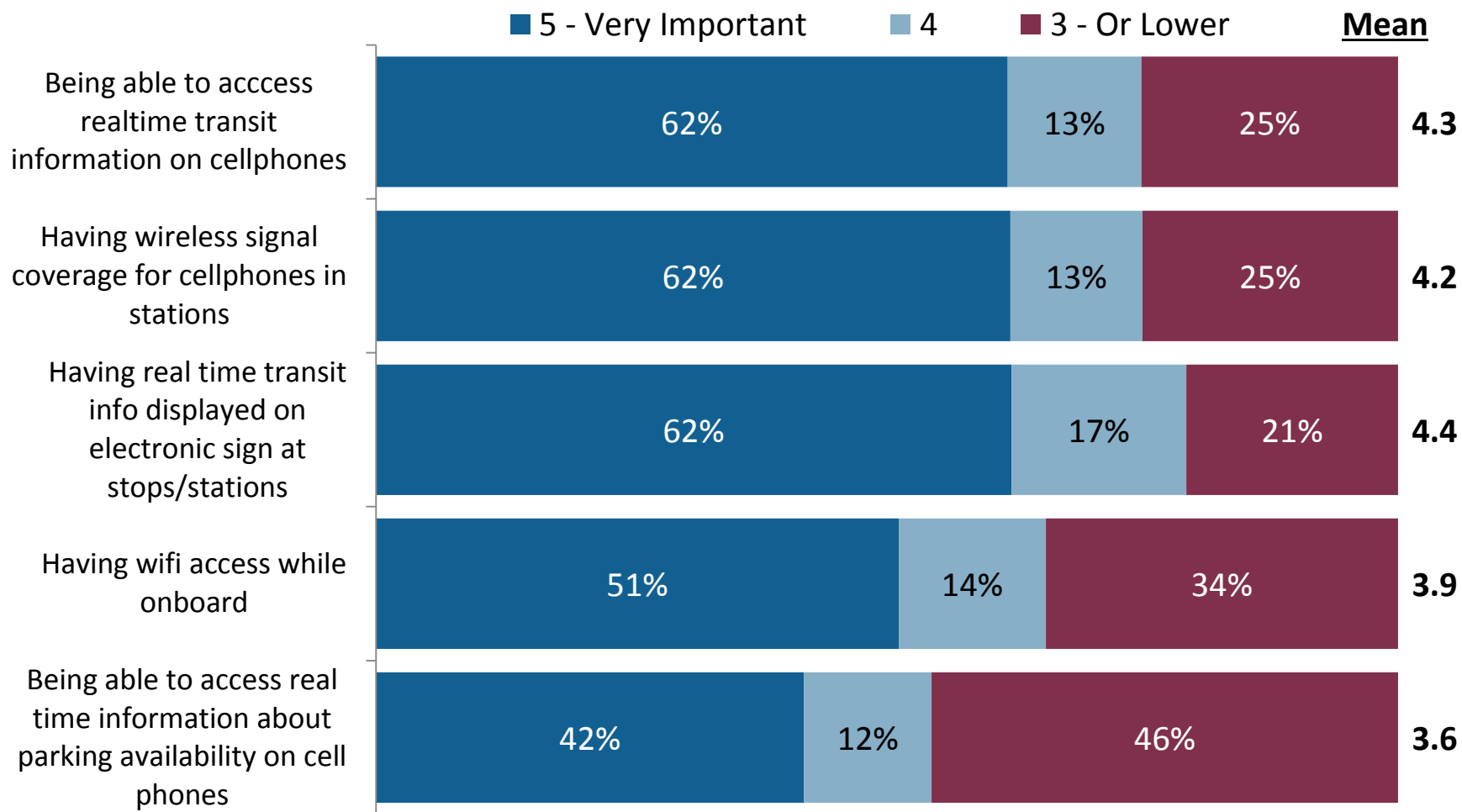
*A majority of Central Link light rail riders prioritize each tech amenity except for real-time parking availability.*



40-44. Using a scale of 1 through 5, where 1 means not at all important and 5 means very important, how important would you rate which of the following...

# Importance of Technology Onboard or at Stations – Sounder

*Sounder riders place an equally high priority on real-time transit info (on mobile and at stations) and wireless coverage at stations.*



40-44. Using a scale of 1 through 5, where 1 means not at all important and 5 means very important, how important would you rate which of the following ...

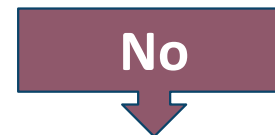
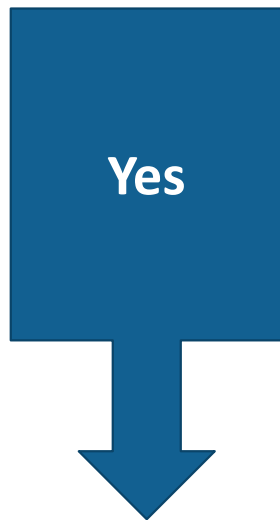


# Choice Riders

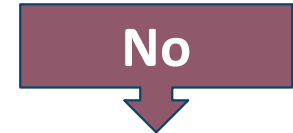
# Choice Rider Definition & Methodology

- ▶ The Choice Rider survey was conducted in tandem with the Customer Satisfaction intercept survey.
- ▶ A total of 300 interviews were conducted between November 17<sup>th</sup> and December 21<sup>st</sup> 2015.
- ▶ *To ensure all respondents are part of this Choice Rider subgroup, they were screened based on the following criteria...*

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



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



**Non-Choice  
(Terminated out of Survey)**

In an average seven day week, how many days do you ride transit for this trip, that is how many days do you ride transit to get where you are going today?



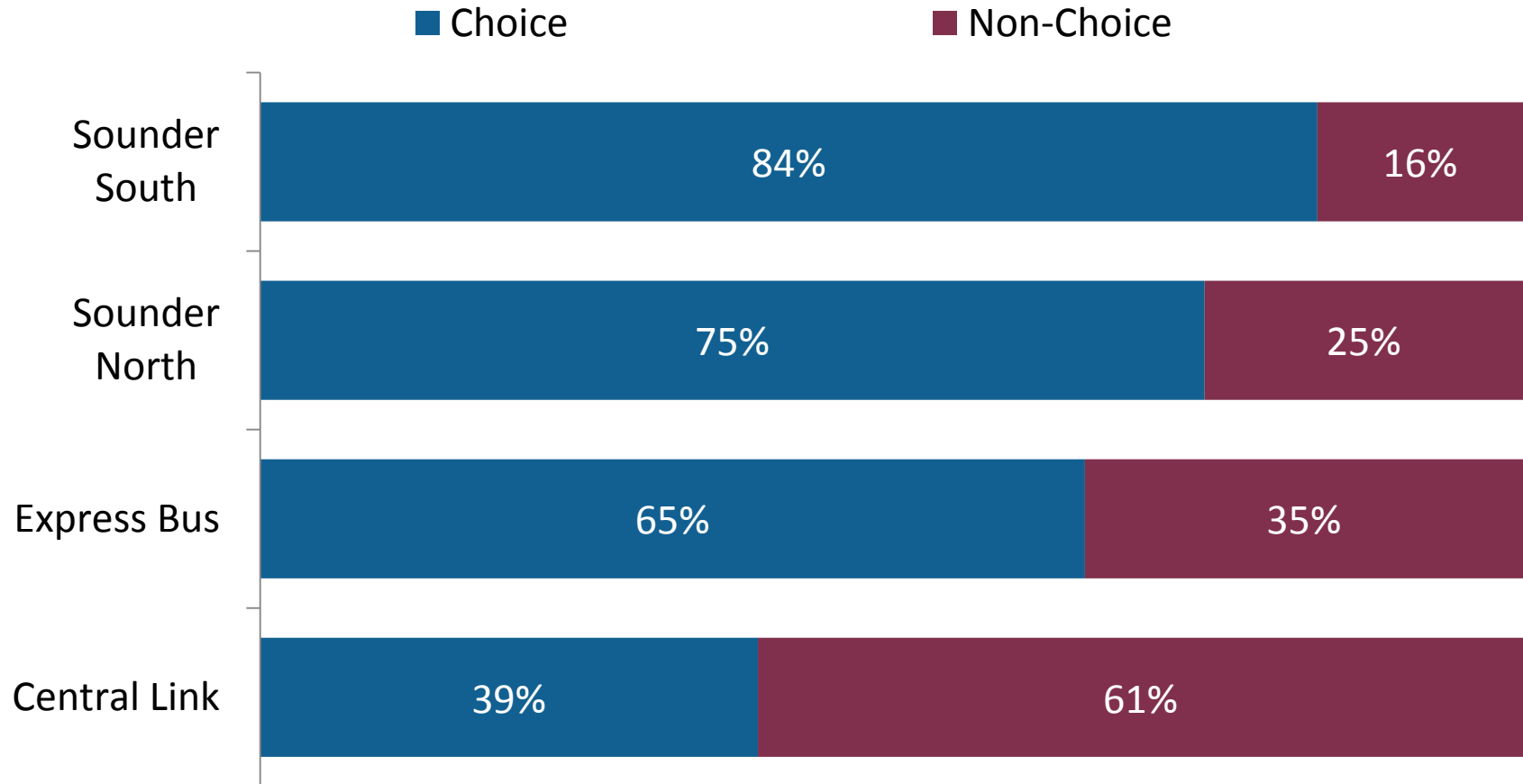
**Choice Rider**



**Non-Choice  
(Terminated out of Survey)**

# Choice Riders by Service (Customer Sat. Survey)

*Sounder and Express bus largely use ST as a matter of preference while a majority of Link riders consider it a necessity.*



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

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

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

# % of Choice Riders with a Car (Choice Survey)

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

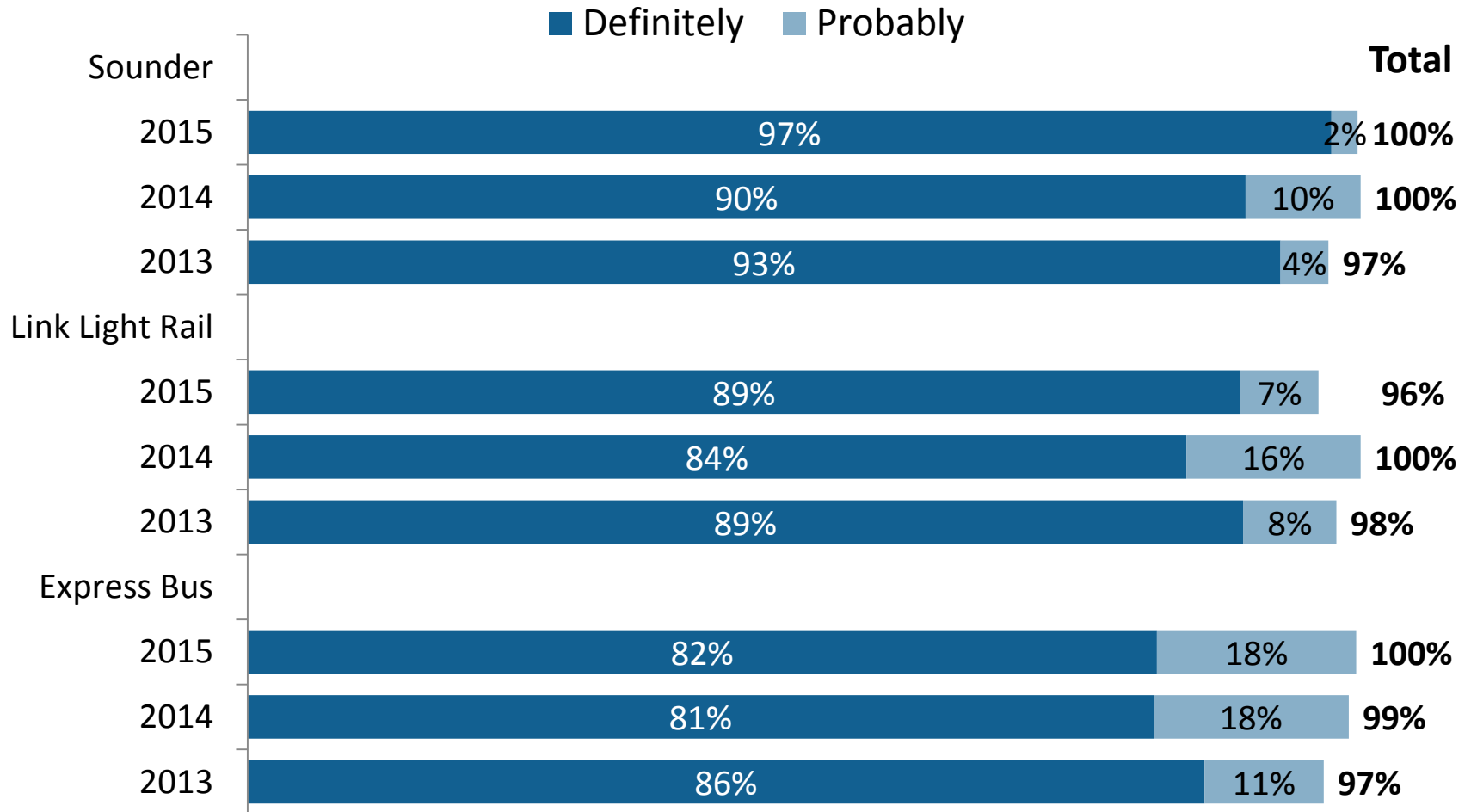
## 'Yes' % Overall and by Service





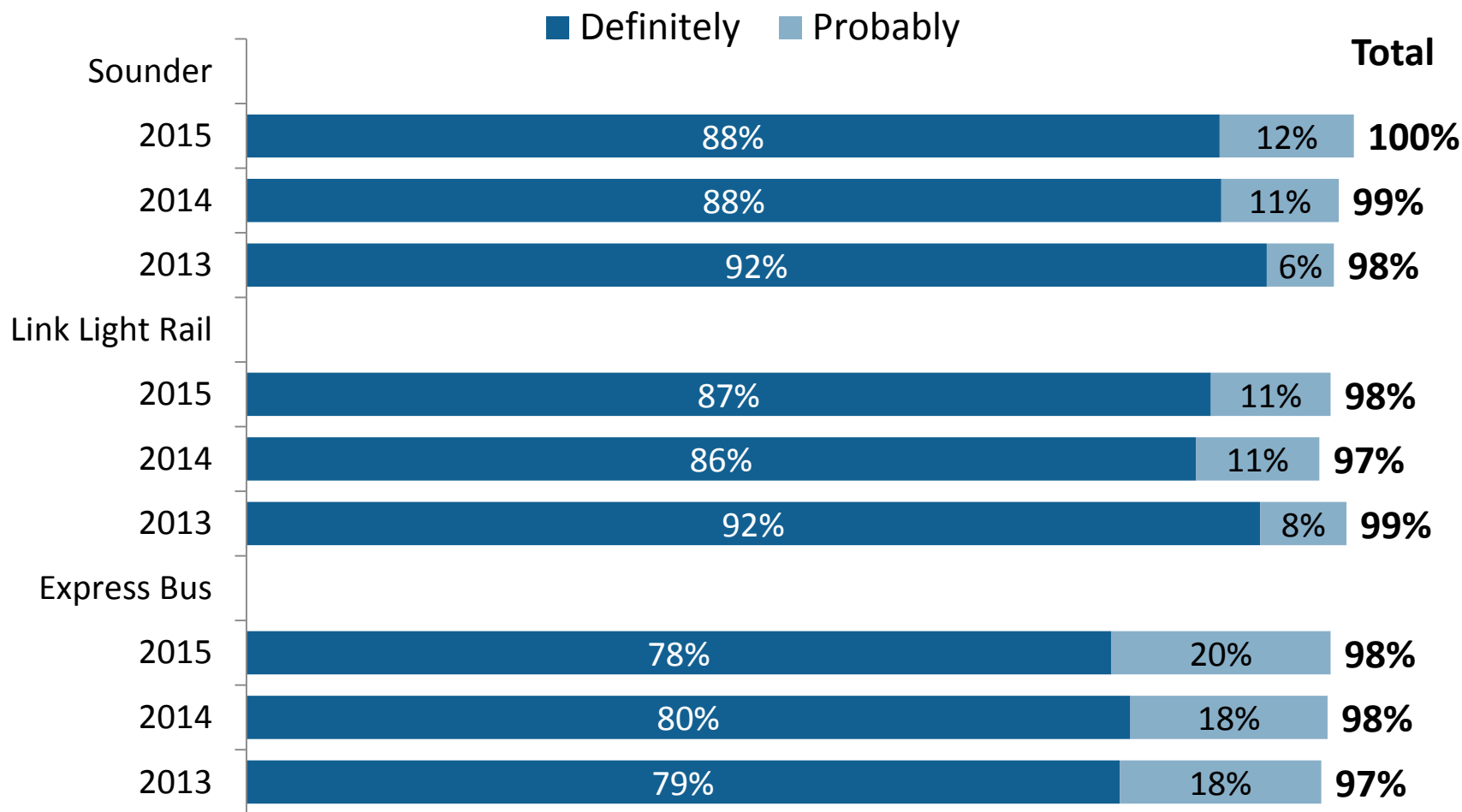
# Continue Using Sound Transit

*Virtually all ST Choice riders plan to continue to ride ST. These proportions are highest among Sounder riders.*



# Recommend Using Sound Transit

*Nearly all of Choice riders would recommend their service to a friend or family member.*



# ST Advertising Source Recall – Year by Year

*Among Choice riders, ST ad recall is the lowest it's been since 2012.*

**\* Note: This survey was conducted prior to the launch of the Step Up campaign.**

Source of Advertising	Overall 2015	Overall 2014	Overall 2013	Overall 2012
On board buses/trains	16%	36%	29%	31%
Television	10%	18%	20%	20%
Radio	10%	6%	6%	15%
Newspaper	1%	2%	2%	3%
Not sure/Can't recall	21%	16%	32%	13%
None	39%	29%	16%	29%

# ST Advertising Content Recall – Year by Year

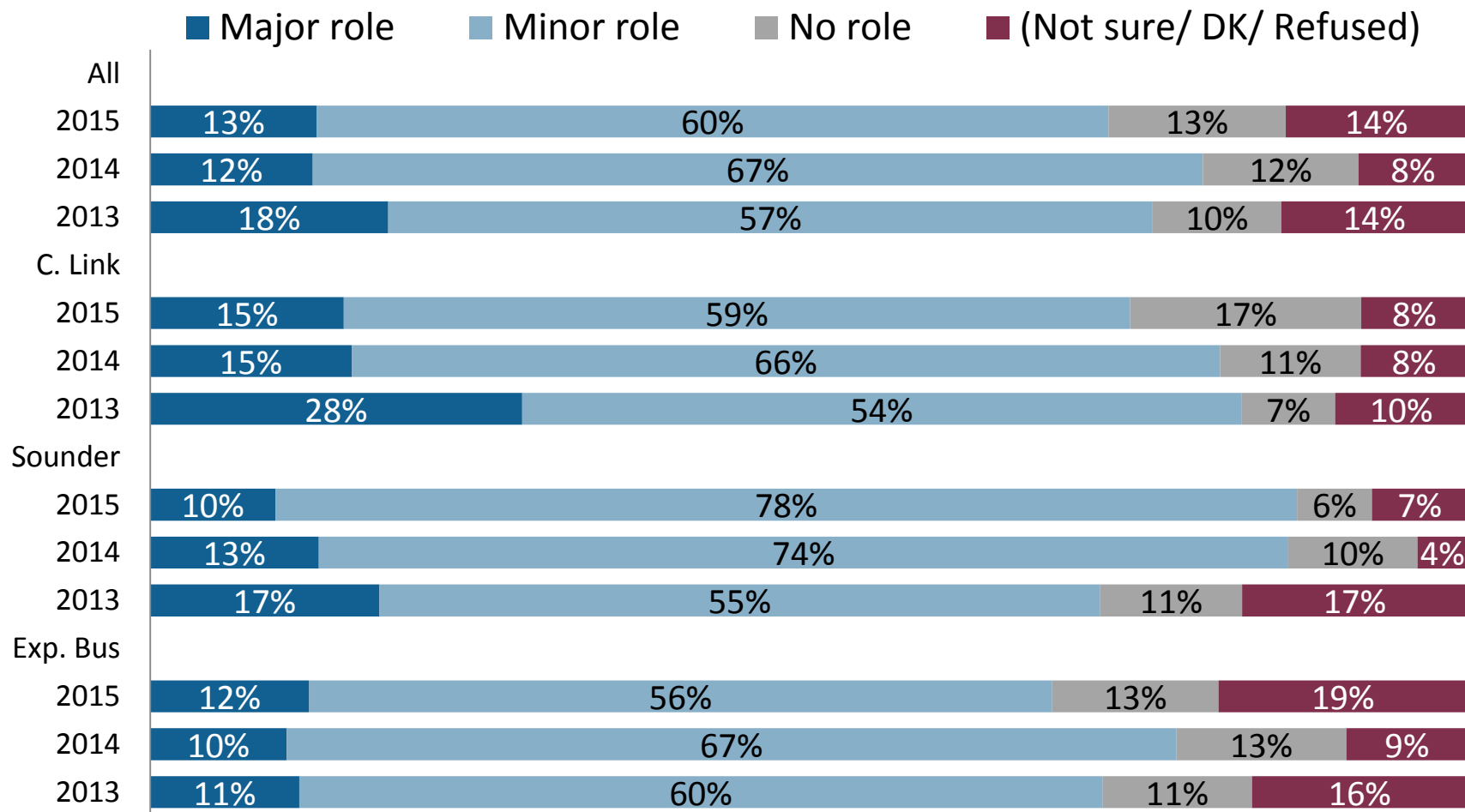
*No particular themes dominate the list of topics that riders recall from recent advertising.*

Top Mentions	Overall 2015	Overall 2014	Overall 2013	Overall 2012
Voice of reason/old lady	9%	21%	17%	21%
Ride the wave	6%	5%	3%	7%
Sound Transit ad/logo	6%	5%	2%	5%
Stress free/relax (no traffic)	5%	3%	3%	5%
Convenient/easy	3%	3%	2%	2%
Light Rail/Light Rail Expansion	3%	3%	-	-
Save gas	-	2%	2%	3%
Tweeting	-	2%	-	-
Choices/Best Choice	-	2%	-	-
Transit Mother/Fairy/Lady	-	1%	-	-
Not being able to let go of car	-	1%	-	-
Cheetah/Fast	-	1%	-	-
Can do other things, read	-	1%	2%	3%

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

# Perceived ST Advertising Impact

*The impact of advertising remains consistent with years past. A strong majority think advertising plays at least a minor role in others' decision to start riding transit.*



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

# Best Improvement Forced Choice – by Service

*Among Choice riders, more frequent service and expanded parking make up the largest improvement suggestions across all services. Requests for these items are highest among Sounder riders.*

Top Mentions	Overall	Exp. Bus	Sounder	C. Link
More frequent service	34%	32%	75%	21%
More park and ride spaces	33%	26%	55%	36%
Better coordination between routes and transfers	21%	17%	29%	26%
Concession, newspaper, or food stands at stations	19%	16%	28%	20%
More signal priority for transit to make the ride faster	16%	16%	20%	16%
More space	2%	1%	-	3%
Extended/weekend service	1%	1%	3%	1%
Wifi	1%	2%	2%	-
More destinations/expand service area	<1%	1%	-	-
Bathrooms	<1%	1%	-	-
Other/nothing/no answer	3%	4%	1%	3%

28 What overall improvements could Sound Transit do to improve its services?  
(Multi-response)



# Summary of Findings

---

- *A strong majority of riders give Sound Transit a positive rating of B or higher while nearly half of riders gave the agency an A grade in 2015.*
- *Overall Sounder Southline grades have declined slightly from 2014 while grades for the rest of Sound Transit's services have either improved or stayed on par with previous years.*
- *On-time performance ratings have dropped significantly among Sounder South riders while trip time ratings have also declined among Sounder North riders. Time satisfaction has held steady among Express bus and Link riders.*
- *Sound Transit's on-board cleanliness ratings have improved significantly since 2014.*
- *Station and transit center cleanliness ratings vary significantly by service. Tacoma Link and Express bus riders rate it the lowest. A strong majority of Sounder and Central Link riders give transit center and station cleanliness an A grade.*
- *Overall ST safety ratings have mostly improved or stayed consistent with previous years. Safety ratings are lower among Tacoma Link and Express bus rider than other ST services.*
- *System investments – particularly more frequent buses/trains– make up the bulk of top-of-mind service improvements for Sounder and Express bus riders. Better on-time performance and communicating delays/cancellations are also common improvement suggestions among Sounder riders.*

# Contacts

---



Ian Stewart

[ian@emcresearch.com](mailto:ian@emcresearch.com)

206.652.2654 Ext. 2

Brian Vines

[brian@emcresearch.com](mailto:brian@emcresearch.com)

206.652.2454 Ext. 4