

CTA RIDER/NON-RIDER BEHAVIOR AND ATTITUDES SURVEY

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**Prepared for the Chicago Transit Authority
Prepared by Abt SRBI**



Agenda

- ⦿ **Background & Method**
- ⦿ **Key Findings**
- ⦿ **Summary of Key Findings**
- ⦿ **Q & A**

Background & Method

- ◎ **Background**

- ◎ **Method**

Background

- Last conducted in 2000
- CTA wants to increase ridership
- Goal is to understand the complexities of those in CTA service area:
 - who they are
 - how they travel
 - transportation needs
 - CTA's image
 - opportunities for improving performance and communications

Method

- Telephone survey among those with landlines and cell-phone service
- 2800 service area residents age 16+
- Disproportionate sample by geography
- Weighted to match known pop statistics by demography, geography, phone ownership
- Questionnaire: trip behavior, transportation needs, demographics, CTA and auto attitudes
- Fielded October – November 2009

Key Findings

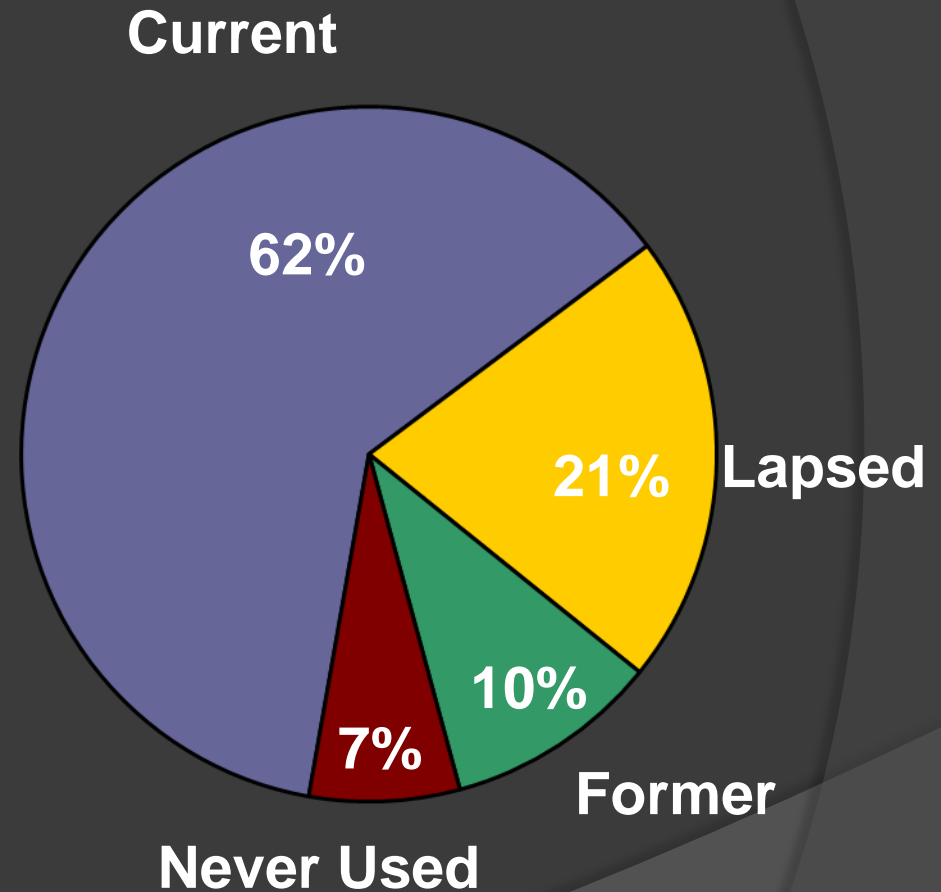
- ① **Customer Landscape**
- ② **Needs/Perceptions/Delivery Gaps**
- ③ **Segmentation**

Customer Landscape

- ◎ **CTA Experience**
- ◎ **Customer & Non-customer Profiles**
- ◎ **Customer Subgroups**
- ◎ **Non-customer Subgroups**

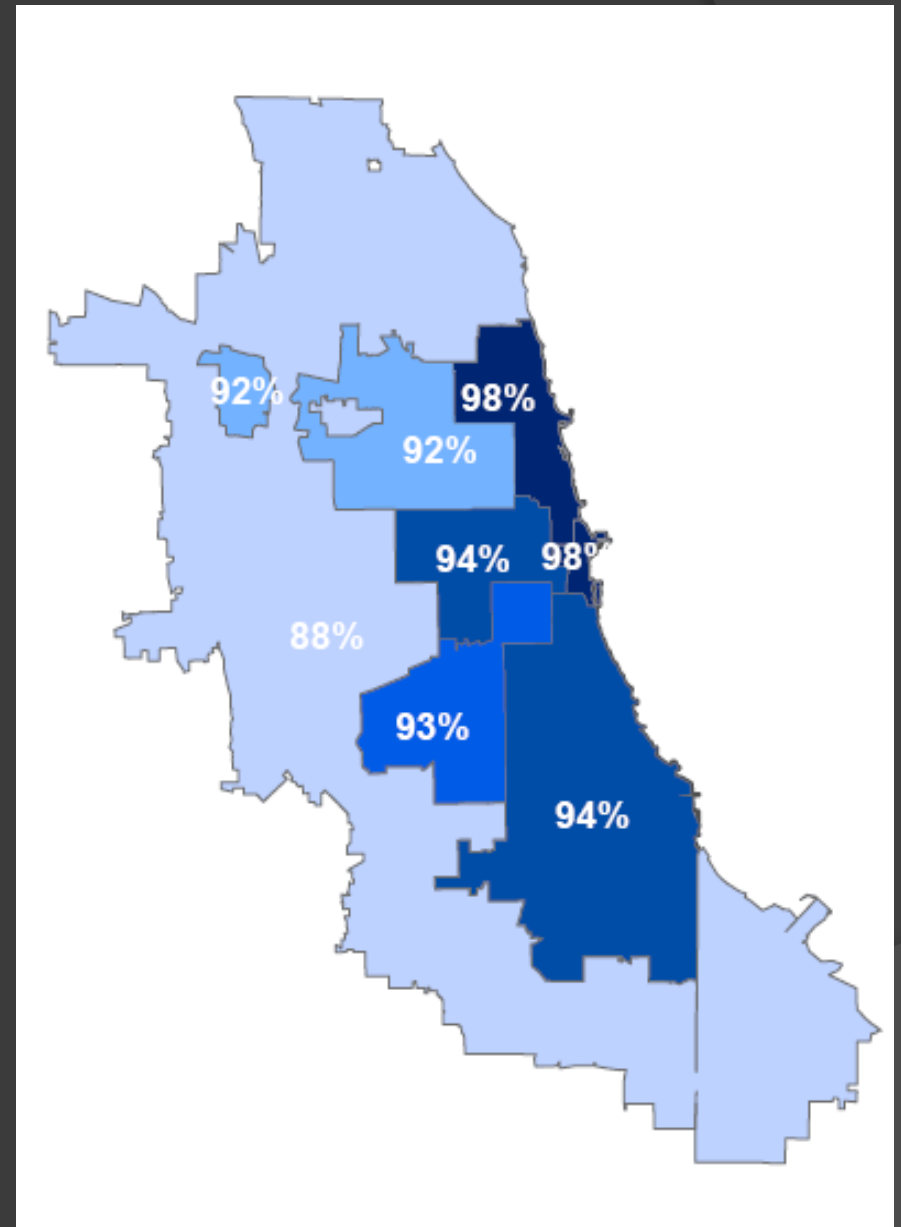
CTA Experience: Total Market

- Virtually all (93%) already tried CTA
- Most (62%) currently use
- Rest are mostly lapsed (past year, not past month – 21%) and former (tried but not past year– 10%)



CTA Experience: By Geography

- 94% in the City as a whole
- Less so in the Suburbs (88%)
- Strongest in Downtown and North (both 98%)



Customer & Non-customer Profiles

Customers

- Skew male, younger, more students, less affluent, more Hispanic
- Skew City, “newer” to home
- Fewer have licenses or cars



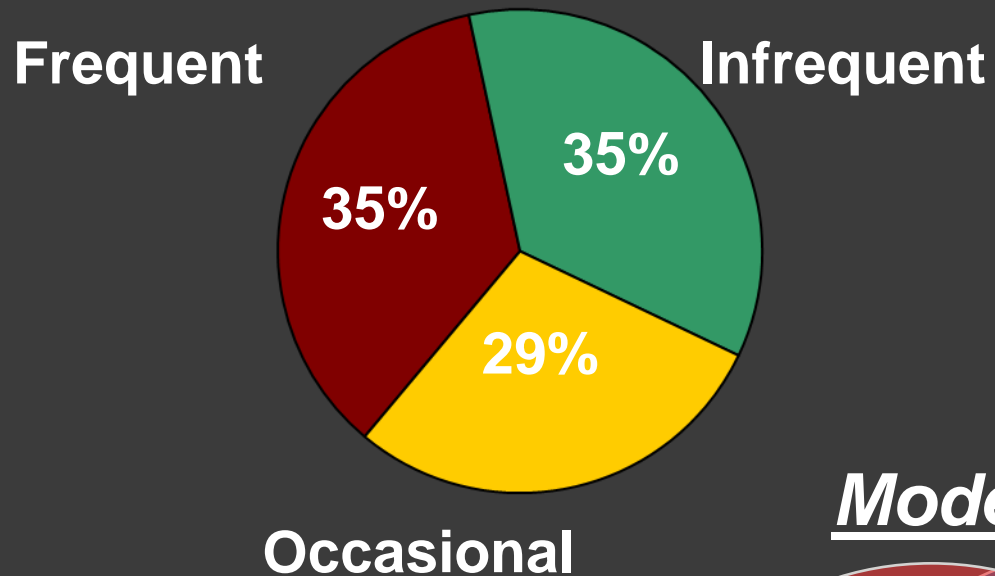
Non-customers

- Skew female, older and retired, more affluent, more Caucasian
- Skew Suburbs, in home longer
- More have licenses and cars

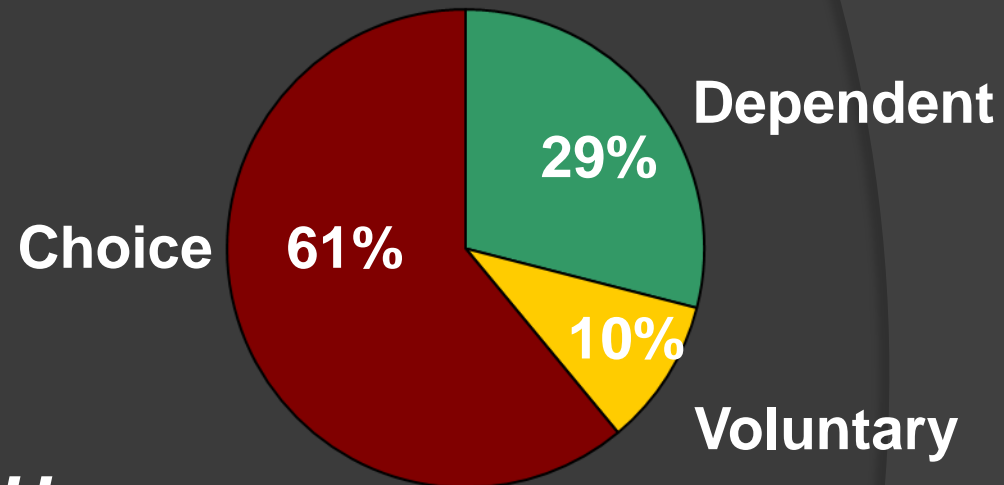


Customer Subgroups: Overview

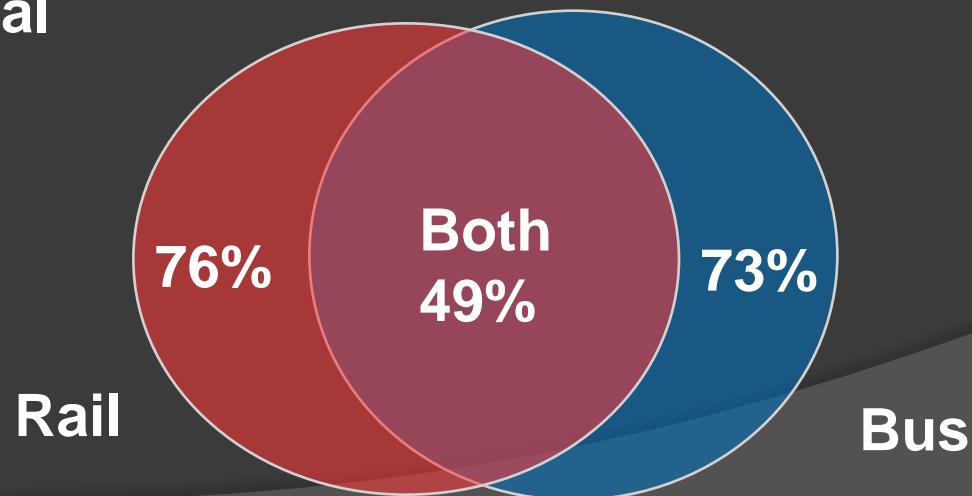
Frequency of Use



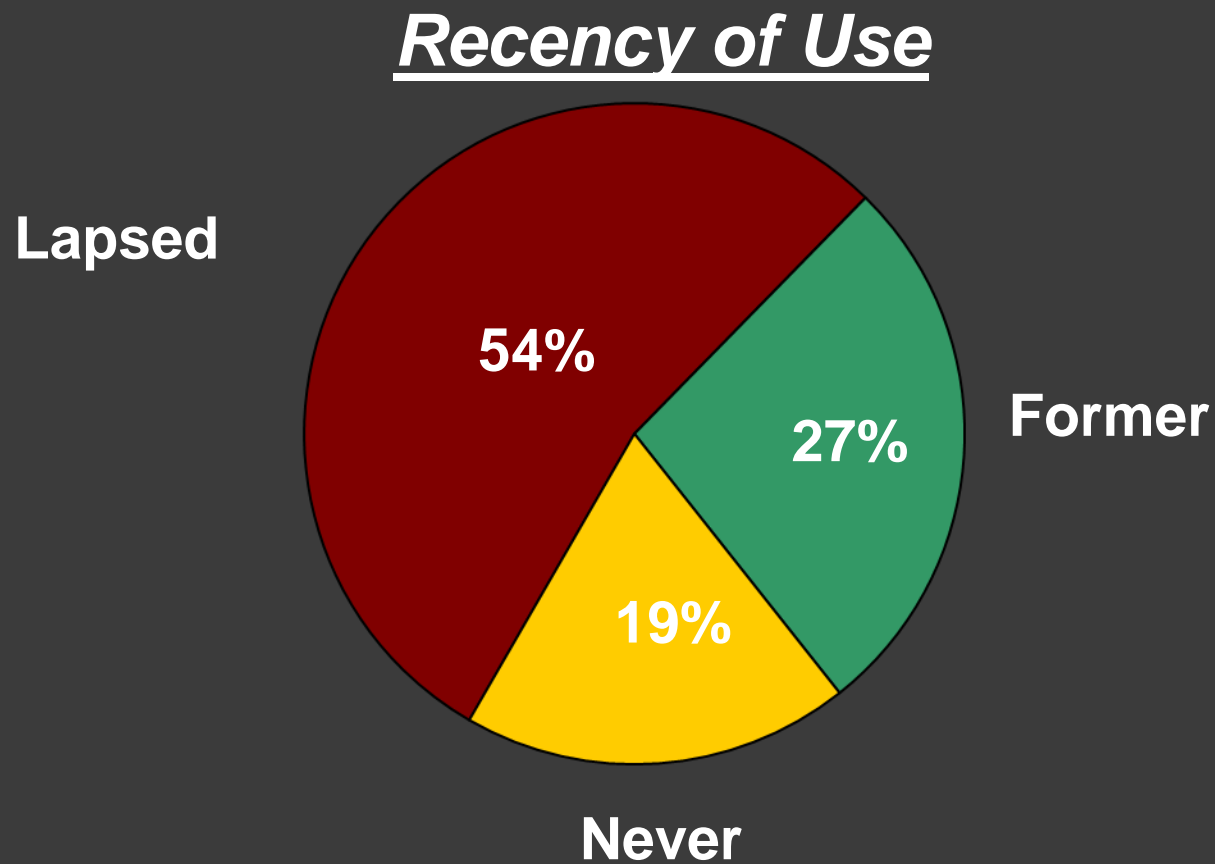
Transit Dependence



Mode Use



Non-customer Subgroups: Overview



Needs/Perceptions/Delivery Gaps

- ⦿ **Transportation Needs Examined**
- ⦿ **Transportation Needs Overall**
- ⦿ **Overall Ratings**
- ⦿ **Gap Charts**

Transportation Needs Examined

- Examined 8 factors for needs and mode ratings (examined on an importance scale of 0-10):

<i>On Time</i> (OTP, quick)	<i>Part of your world</i> (familiar, nearby)
<i>Traffic</i> (congestion, environment)	<i>Flexibility</i> (schedules, emergency)
<i>Safety</i> (personal safety, crime)	<i>Comfort</i> (clean, comfortable, seating)
<i>Value</i> (good value)	<i>Info</i> (staff knowledge, trip info)

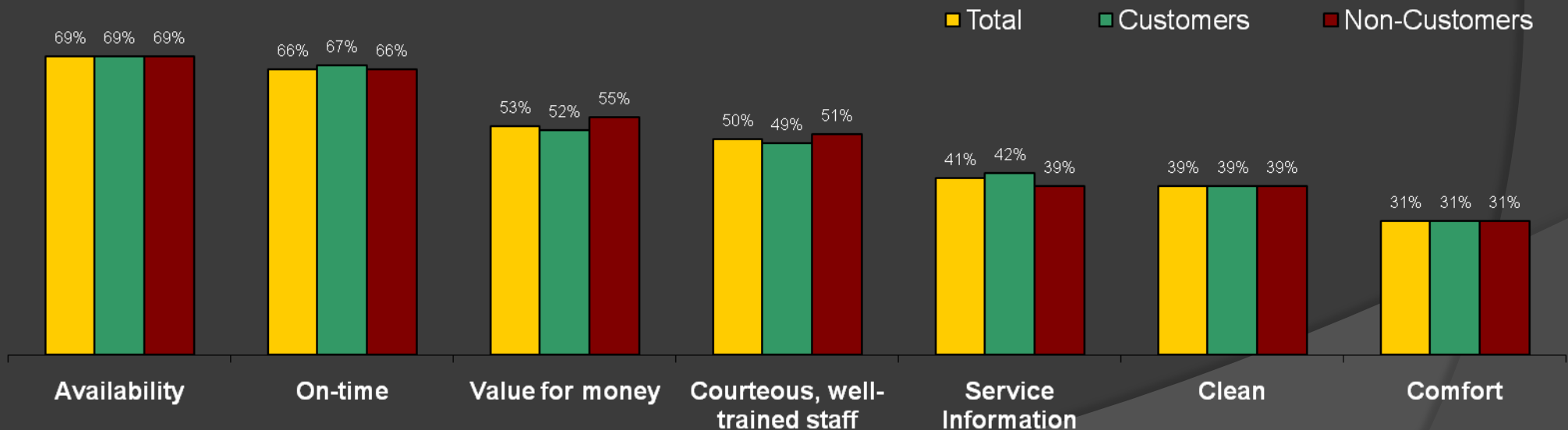
Transportation Needs: Overall

	<u>Customers</u>	<u>Non-Customers</u>
	% 8/9/10; Rank	% 8/9/10; Rank
<i>On Time</i>	84 / 1	86 / 1
<i>Part of Your World</i>	73 / 2	73 / 4
<i>Flexibility</i>	72 / 3	84 / 2
<i>Value</i>	71 / 4	76 / 3
<i>Info</i>	66 / 5	69 / 7
<i>Traffic</i>	63 / 6 (t)	64 / 8
<i>Safety</i>	63 / 6 (t)	72 / 5
<i>Comfort</i>	57 / 8	71 / 6

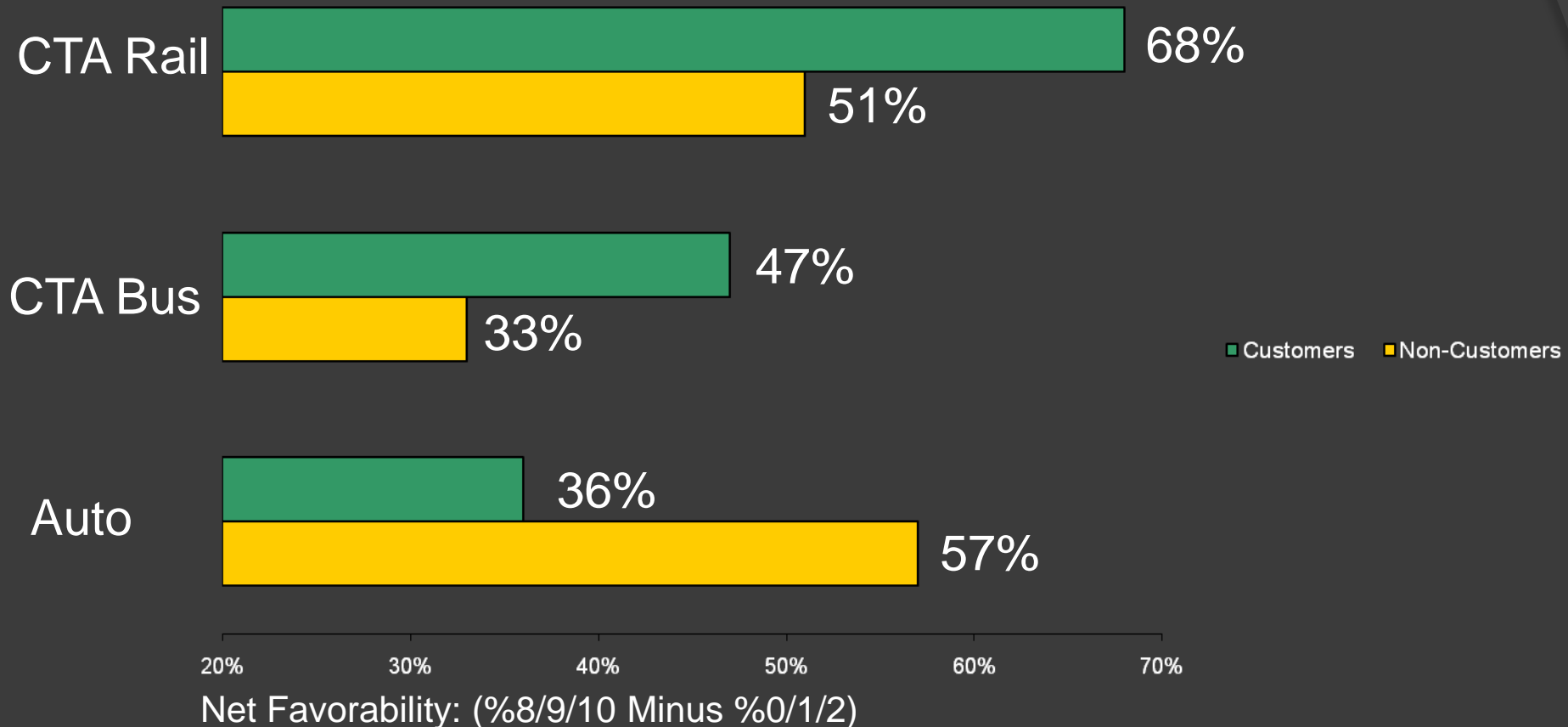
- *On Time* is most important to customers, while *On Time* and *Flexibility* matter most to non-customers. Non-customers consider a variety of needs more important than customers do.
- *Comfort* matters least to customers, but non-customers care least about *Traffic*.

Transportation Needs: Priorities

- In head-to-head comparisons of priorities, we looked closer at 7 areas.
- Of these, Customers and Non-customers agree that *Availability* and *On Time* matter most; *Comfort* least.



Overall Ratings

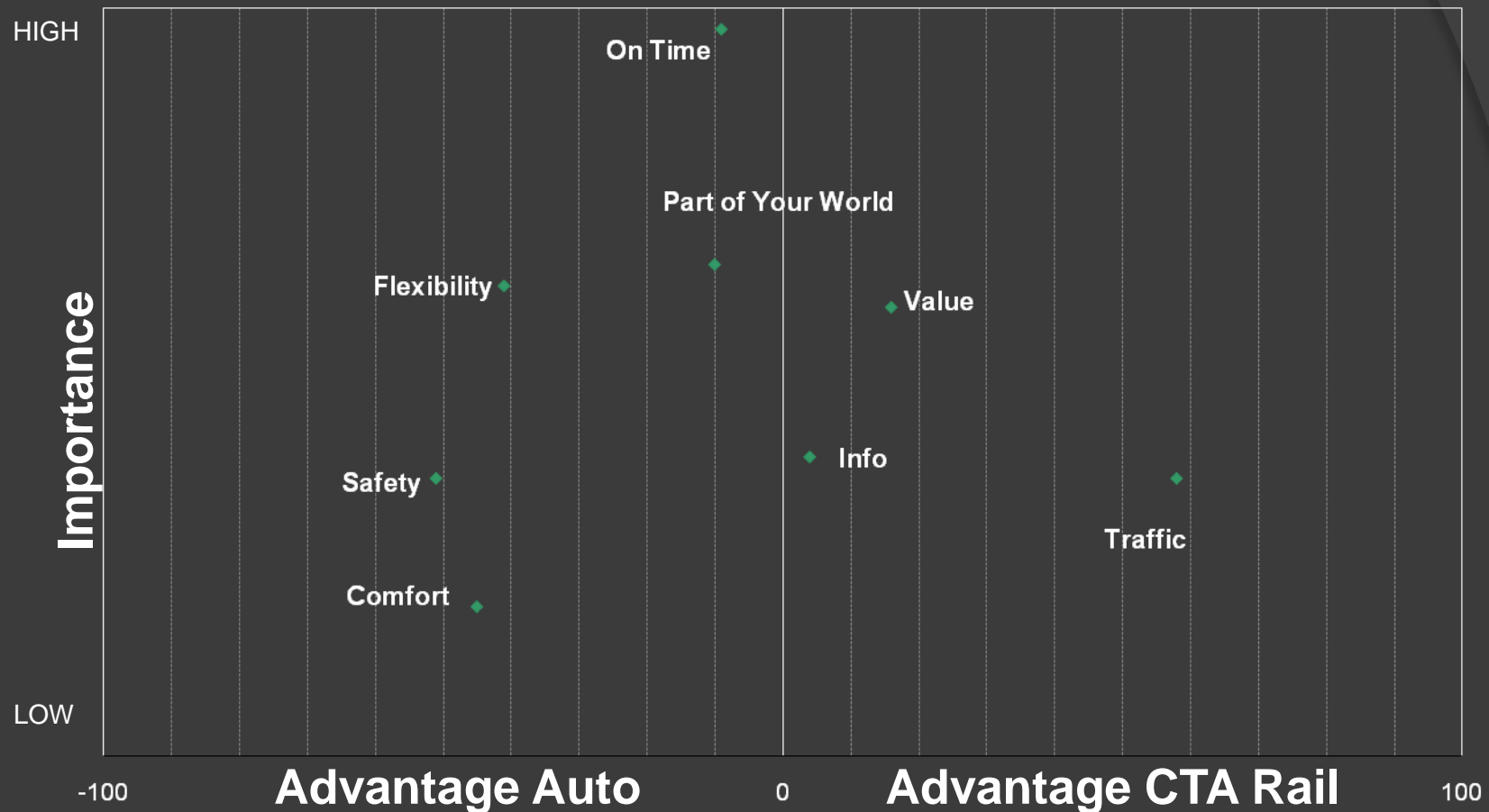


- Customers more positive about CTA modes than auto; rail leads
- Non-customers view auto and CTA rail almost at parity, bus much lower

Gap Charts

- ◎ **Customer Gap Charts**
- ◎ **Non-customer Gap Charts**

Customer Gap Chart: Rail vs. Auto



- Auto leads for *On Time*, *Flexibility*, and *Part of Your World*. Also for *moderately* important *Safety* and *Comfort*
- CTA rail holds a strong advantage for *Traffic*; slight advantage for *Value* and *Info*

Non-customer Gap Chart: Rail vs. Auto



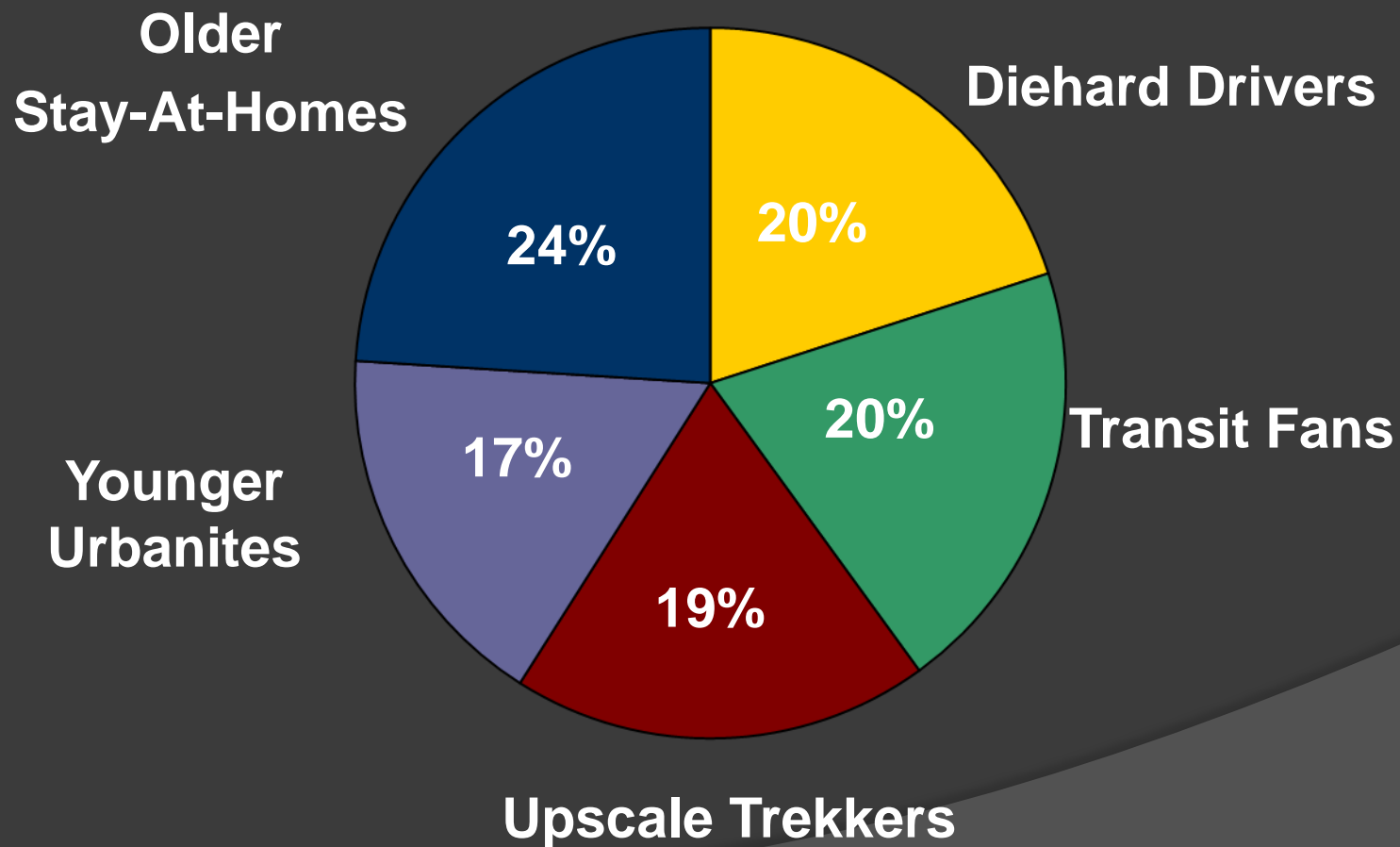
- Auto's advantages more pronounced among non-customers; *Value* is now also an advantage
- CTA rail's sole advantage is *Traffic* (low importance)

Segmentation

- ⦿ **No longer just “Customers” and “Non-Customers”**
- ⦿ **Market segments**

Segmentation

- Five distinct segments defined with fairly close proportions:

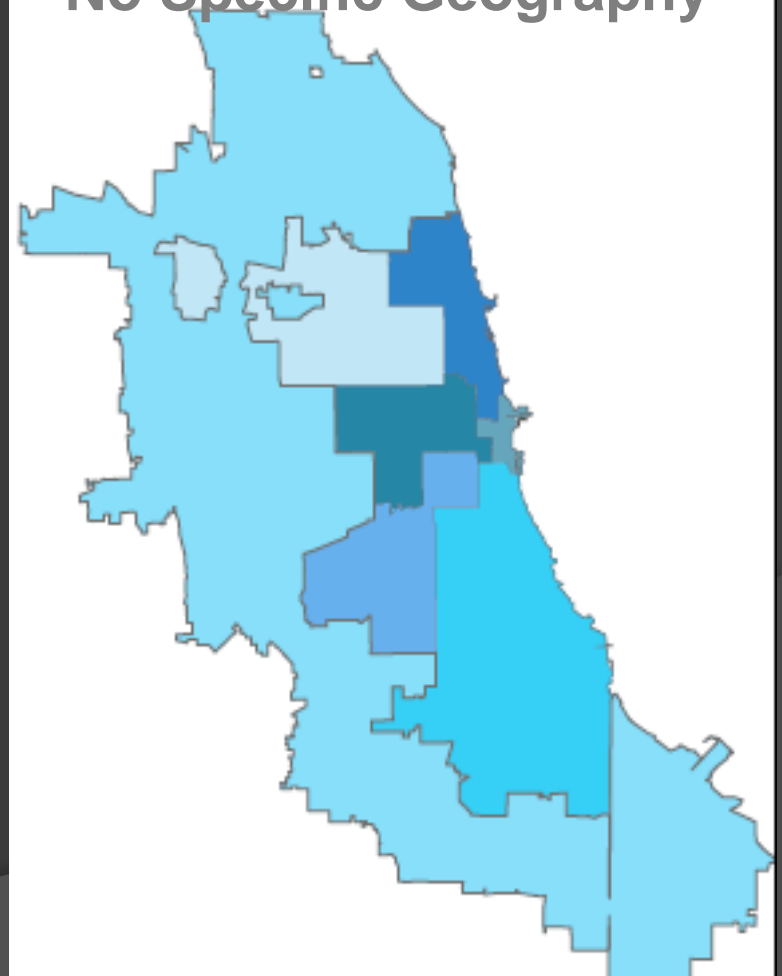


Segmentation: Older Stay-at-Homes

- Older, more retired, long-term residents, African-American or Hispanic; less affluent
- Fewer trips (weekday/weekend); more likely to take CTA bus, less for car, less commuters
- Care most about *On Time*, *Part of Your World*, *Value* and *Info*
- Generally positive about CTA overall; rate bus, rail, and auto about equally on most attributes

24% of population
23% of customers
26% of non-customers

No Specific Geography

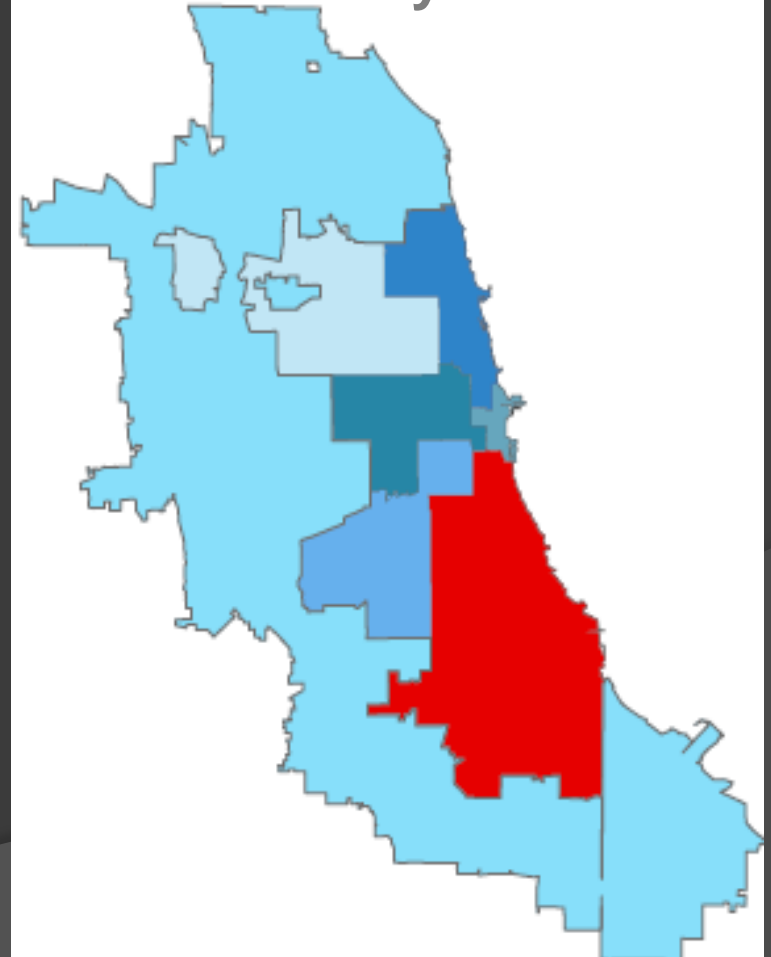


Segmentation: Diehard Drivers

- More female, skew African-American
- Use car for weekday trips
- *On Time, Flexibility, Safety* (from crime) matter most to them; *Traffic* matters less
- Rate auto higher than all CTA modes

20% of population
13% of customers
32% of non-customers

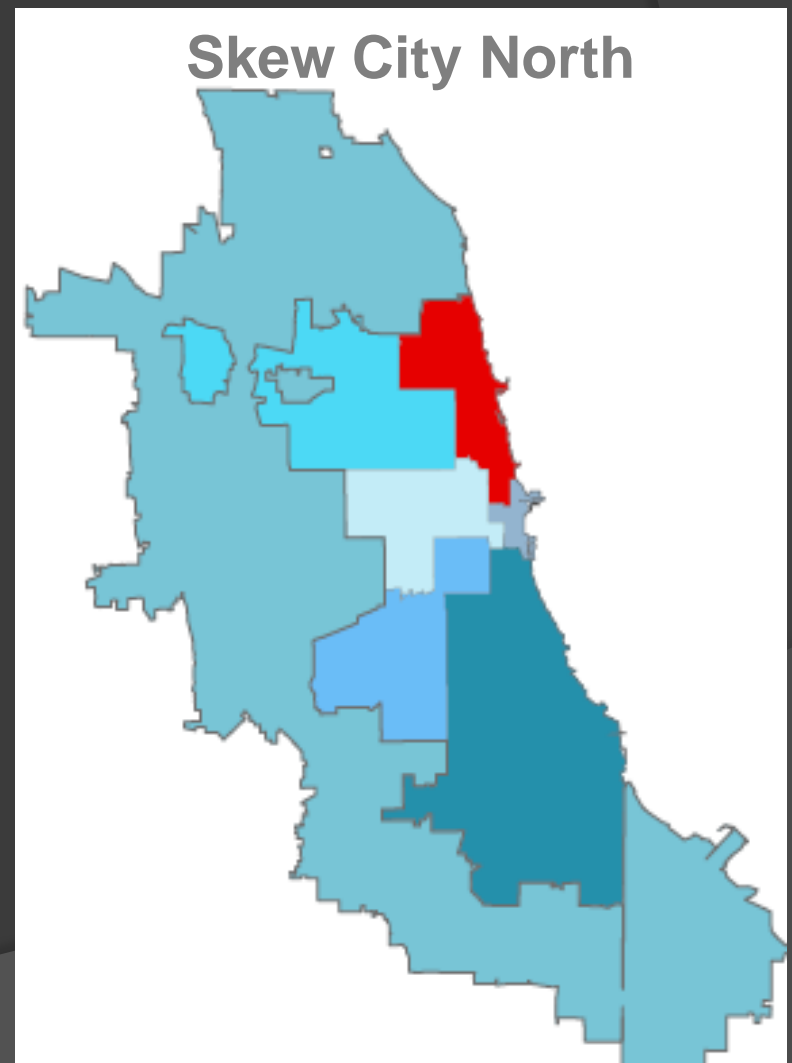
Skew City South



Segmentation: Transit Fans

- More male, 25-34, Caucasian, small HH size
- Fewer weekday trips but “fair share” on weekend; bus and rail customers, more work at home/telecommute, fewer cars
- On Time* is most important
- Favor all CTA modes over auto; rail and bus beat auto for *Value*, *Part of Your World*, *Traffic*; rail also leads for *On Time*

20% of population
28% of customers
7% of non-customers

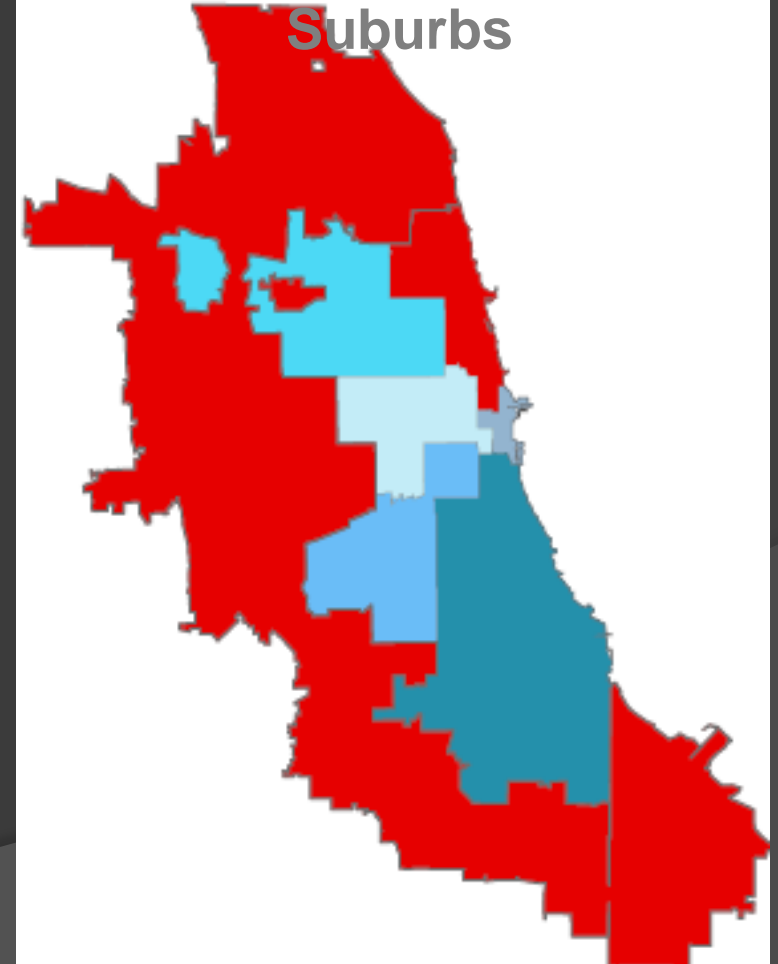


Segmentation: Upscale Trekkers

- More male, employed, Caucasian, affluent, educated; fewer retired
- Make many trips, especially weekends, tend to drive
- *On Time* is the most important feature; so is *Part of Your World*
- Auto generally superior than rail; auto leads rail for *Flexibility* and *Safety*

19% of population
20% of customers
18% of non-customers

Skew City North &
Suburbs

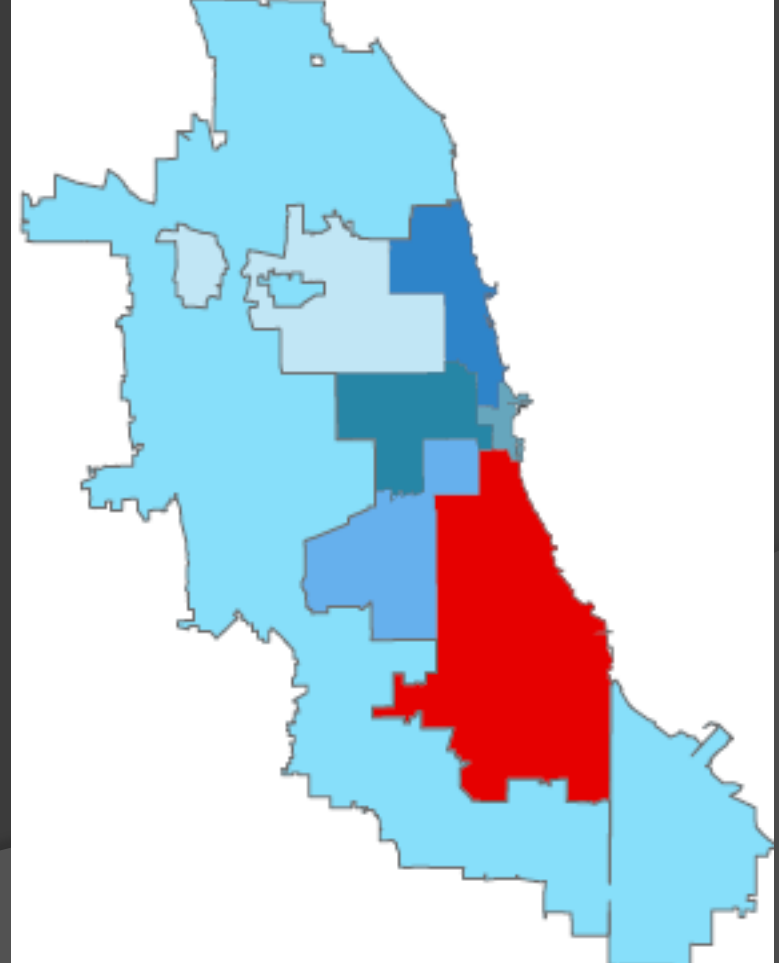


Segmentation: Younger Urbanites

- More young, female, African-American, students; somewhat lower income
- More weekday trips, commuters; use CTA & car relatively equally
- Care most about *Flexibility*, *Value*, and *Part of Your World*
- Consider CTA rail equal to auto overall, but not bus; rail seen superior for *Traffic*, auto leads on all else

17% of population
17% of customers
16% of non-customers

Skew City South



Summary of Key Findings

- ◉ CTA experience in service area is saturated.
- ◉ Customers
 - Equally divided into frequent, infrequent and occasional users.
 - Majority choose transit though they have other options; a third are totally dependent.
 - Bus and rail have equal penetration with about half of customers currently using both modes.
- ◉ Non-Customers
 - Majority of non-customers are lapsed (past year, not past month).

Summary of Key Findings (Cont'd)

- ◎ Customers are most concerned with *On Time*; non-customers want this and much more.
- ◎ Overall, CTA modes rated higher than auto among customers; the reverse is true among non-customers.
- ◎ Analysis produced 5 distinct segments
 - Older Stay-At Homes
 - Diehard Drivers
 - Transit Fans
 - Upscale Trekkers
 - Younger Urbanites

Questions?

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Appendix

Customer Subgroups: Frequency Detail

<u>Frequent</u>	<u>Infrequent</u>	<u>Occasional</u>
<ul style="list-style-type: none">• Younger, less affluent, more employed, more African-American, fewer Caucasian• More live in City• More weekday travel, more commute	<ul style="list-style-type: none">• Fewer work full time, more retired• No significant geographic skews• Fewer weekday/ weekend travel, more left home after AM peak	<ul style="list-style-type: none">• More male, older, better educated, more affluent, more Caucasian• More Suburb• Heavier weekend travel, more likely to work at home/telecommute

Customer Subgroups: Dependency Detail

<u>Dependent (29%)</u>	<u>Voluntary (10%)</u>	<u>Choice (61%)</u>
<ul style="list-style-type: none">• More female, less educated, less affluent, fewer working full time• More live in City• Less rail than Voluntary customers	<ul style="list-style-type: none">• Younger, more students, fewer working full time• More live in City, “newer” to home• Fewer commute, but are more likely to return during PM peak	<ul style="list-style-type: none">• More male, better educated, more affluent, more working full time, more Caucasian• Skew Suburb• More weekday/ weekend travel, less travel on CTA

Customer Subgroups: Mode Detail

Rail

- More affluent, better educated, higher income, more working full time, more Caucasian
- More Suburb
- More weekday/weekend travel, more commuters

Bus

- Less affluent, less educated, lower income, fewer working full time, fewer Caucasian
- More City
- Fewer weekday/weekend travel, fewer commuters

Non-customer Subgroups: Recency Detail

<u>Lapsed</u>	<u>Former</u>	<u>Never</u>
<ul style="list-style-type: none">• Younger, more affluent, better educated, more employed full time• No geographic skews• More weekday/ weekend travel	<ul style="list-style-type: none">• More female, older, retired• More live in City South, longer in current residence• Fewer commuters	<ul style="list-style-type: none">• More male, less educated, more Hispanic• Skew Suburb• Less weekday travel, less likely to use own car for travel, fewer with driver's license

Explanation of the Scores

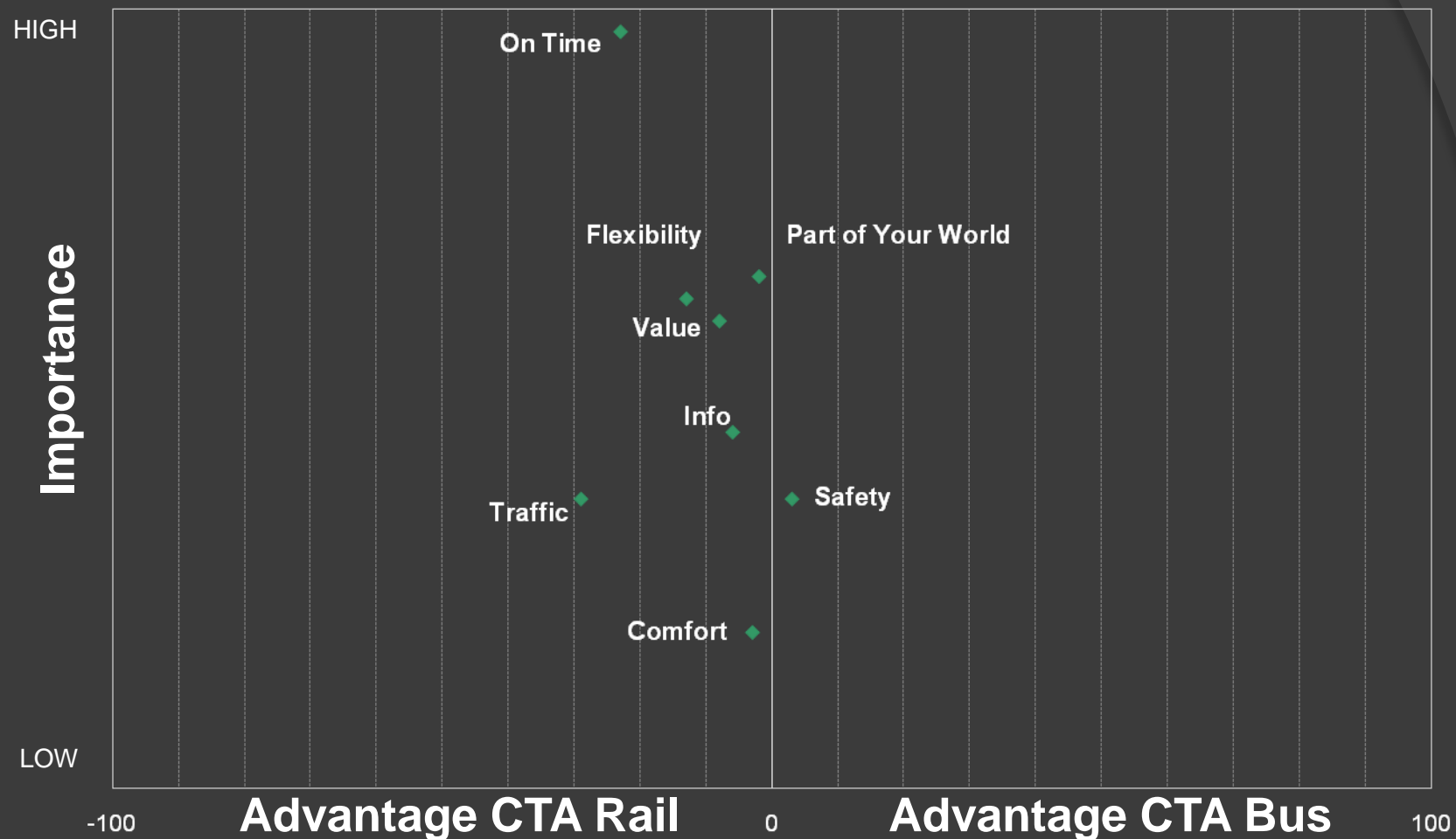
- Transportation needs use the top 3 box on an 11-point scale (% 8/9/10)
- Ratings use “net favorability” index
 - Index created by taking % top 3 box on an 11-point scale and subtracting bottom 3 box (% 8/9/10 minus % 0/1/2)

<i>On Time</i> (OTP, quick)	<i>Part of your world</i> (familiar, nearby)
<i>Traffic</i> (congestion, environment)	<i>Flexibility</i> (schedules, emergency)
<i>Safety</i> (personal safety, crime)	<i>Comfort</i> (clean, comfortable, seating)
<i>Value</i> (good value)	<i>Info</i> (staff knowledge, trip info)

Explanation of the Gap Analysis

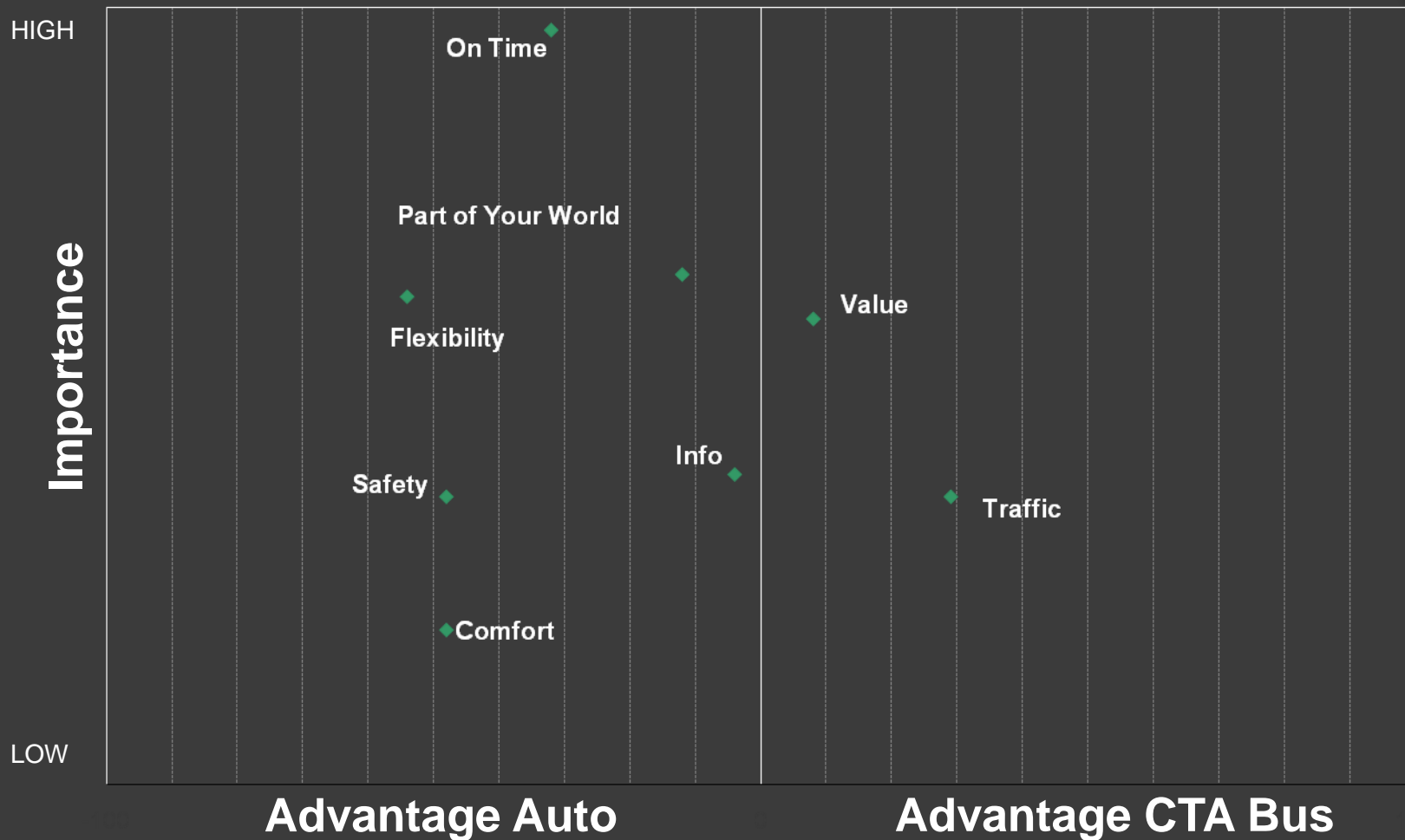
- Gap charts plot comparative mode advantages (x axis) vs. needs or importance (y axis)
- There are always two modes per chart
- Position of attribute on chart determined by two factors:
 - taking “net favorability” index of one mode and subtracting the index from the other comparison mode (i.e.; 12% Rail minus 20% Bus = -8% gap score or an 8% gap advantage for Bus)
 - taking the importance top 3 box score....the higher the score the closer the item is to the top of the chart

Customer Gap Chart: Rail vs. Bus



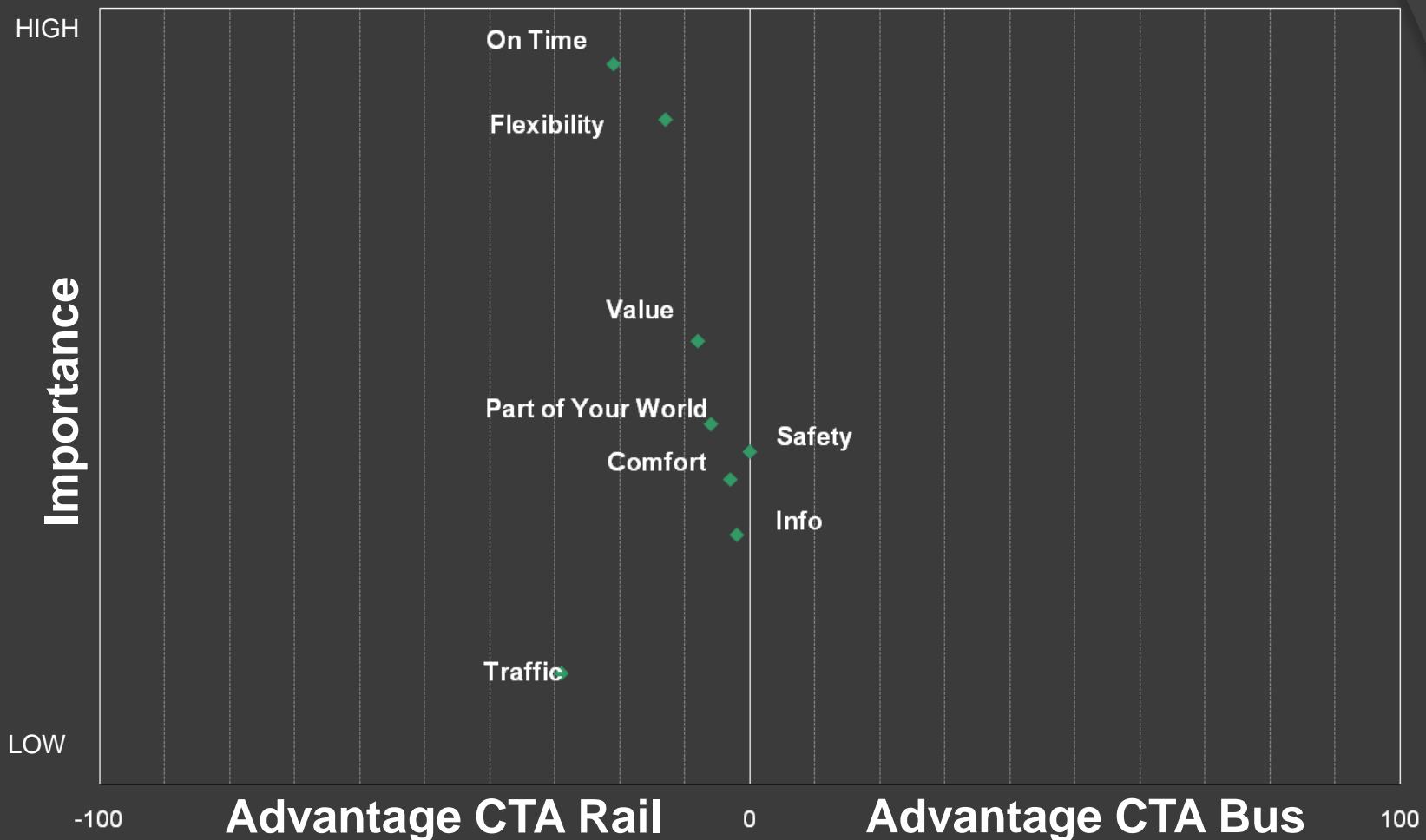
- CTA rail has edge on almost all attributes; largest rail advantages are *On Time* and *Traffic*.

Customer Gap Chart: Bus vs. Auto



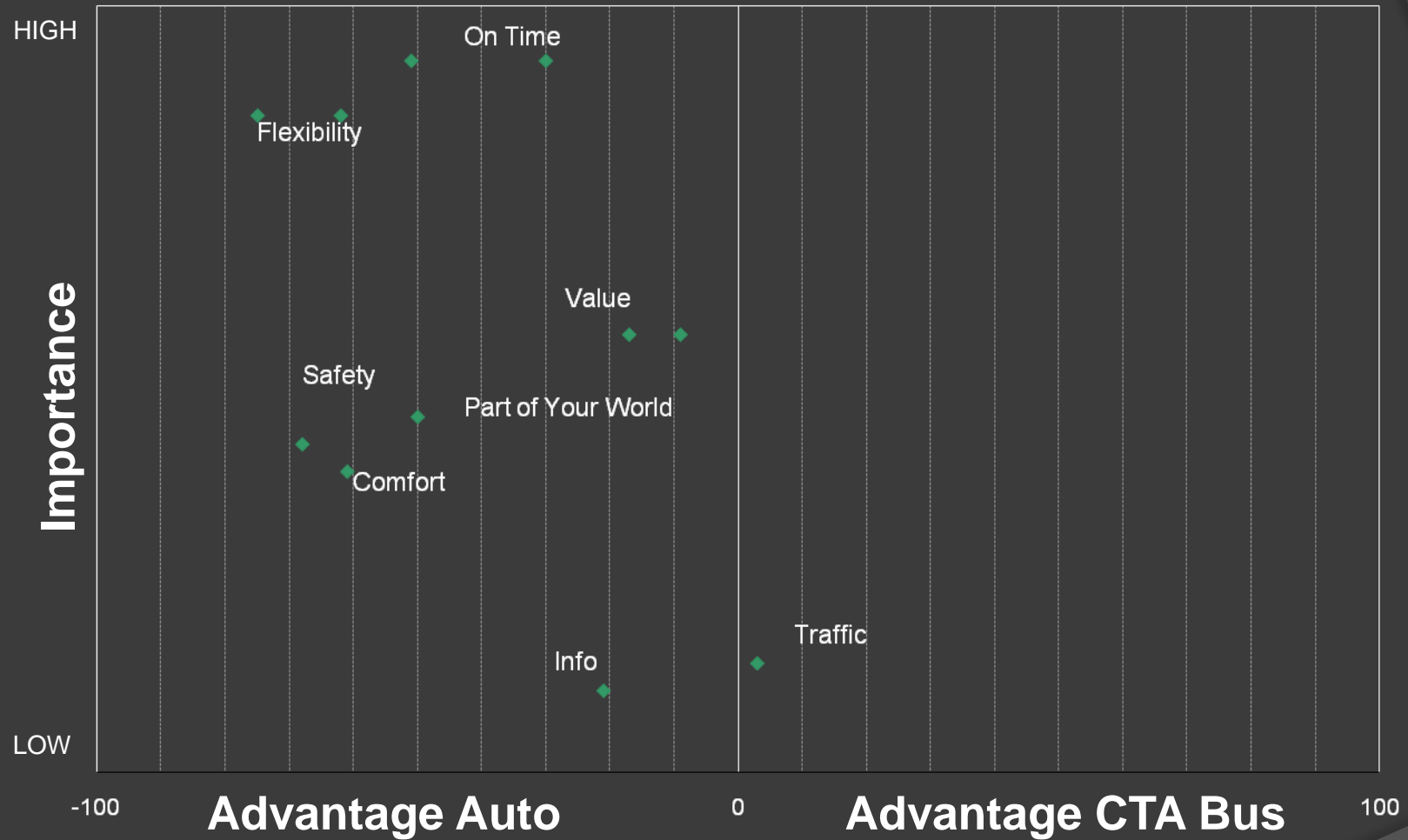
- CTA bus viewed similarly as rail when compared to auto; auto is advantageous in most areas
- Bus seen superior for *Traffic* with slight edge for *Value*

Non-customer Gap Chart: Bus vs. Rail



- Non-customers view rail vs. bus the same as customers:
 - On Time* and *Traffic* stand out for CTA Rail
 - Rail has the edge on all other attributes

Non-customer Gap Chart: Bus vs. Auto



- Auto holds advantage over CTA bus on almost every attribute – even at “almost parity” with bus for *Traffic*

Explanation of the Segmentation Analysis

- ⦿ Respondents divided into distinct segments using a multivariate procedure called *K-means Cluster Analysis*
- ⦿ Each segment contains individuals who share similar views with others in that same group, but carry different views than members of other segments
- ⦿ “Views” based on mode attribute ratings

Segmentation Summary

- Analysis produced 5 distinct segments.
 - Older Stay-At Homes are older, take fewer trips and are generally positive about CTA.
 - Diehard Drivers are skewed female and very car-centered. Safety is very important but “net favorability” is negative for CTA modes.
 - Transit Fans are more likely to be young males. They are core customers although they take fewer trips.
 - Upscale Trekkers are just that, upscale and suburban. They are heavy discretionary travelers who generally prefer to drive. They need to have transportation options close by.
 - Younger Urbanites are heavy travelers. They are not loyal to any mode; they use CTA equally to auto. Like Diehard Drivers, Safety is very important but “net favorability” is negative for CTA modes.