



# King County Metro Transit 2015 Rider/Non-Rider Survey Topline Report

June 15, 2016



## Study Background and Objectives

### **King County Metro places high value on customer feedback:**

- Conducted annual surveys with Metro riders for the past 30+ years
- Bi-annual surveys of non-riders
- Results used by Metro sections to help provide direction for future strategies

### **Primary objectives:**

- Measure market share
- Track customer satisfaction with Metro services
- Identify characteristics of riders and non-riders
- Provide insights on topics of current focus of Metro's service, marketing, and communications strategies





## Methodology

1,840 respondents were interviewed by telephone throughout King County

Landlines and cellphones called

Supplemental sampling was conducted to ensure low-income households well-represented

Three primary subgroups:



### Regular Riders

5 or More One-Way Rides in Past 30 days  
n = 922



### Infrequent Riders

1 - 4 One-Way Rides in Past 30 days  
n = 103

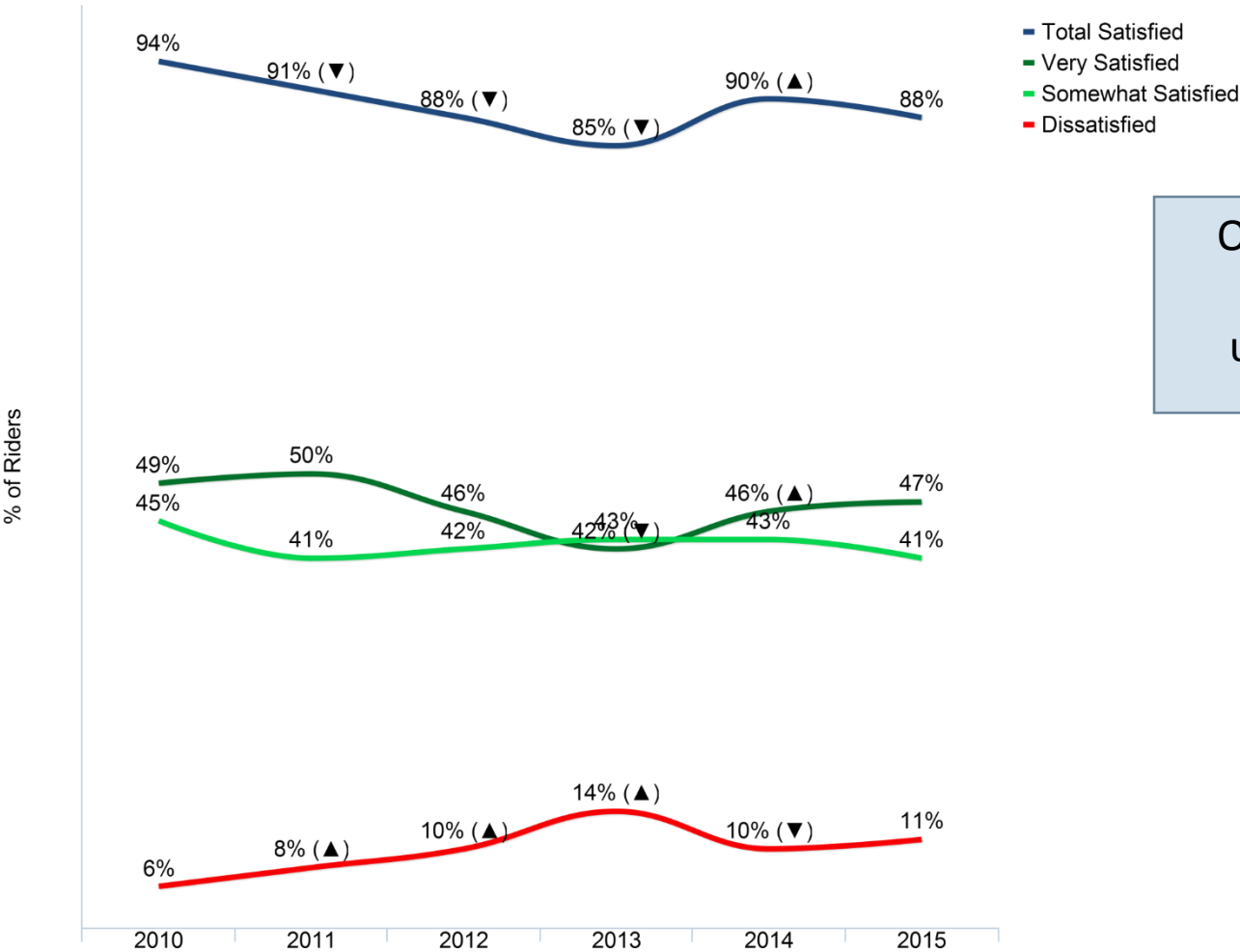


### Non-Riders

Not Ridden in Past 30 days  
n = 815



# Satisfaction: Overall Satisfaction with Metro



Overall satisfaction with Metro is 88%, almost unchanged from 2014.

Question: Overall, would you say you are satisfied or dissatisfied with Metro? Total sums to less than 100%; neutral responses not shown.

Base: Regular and Infrequent Riders

▲ / ▼ indicates a statistically significant change (95% confidence level) from previous year

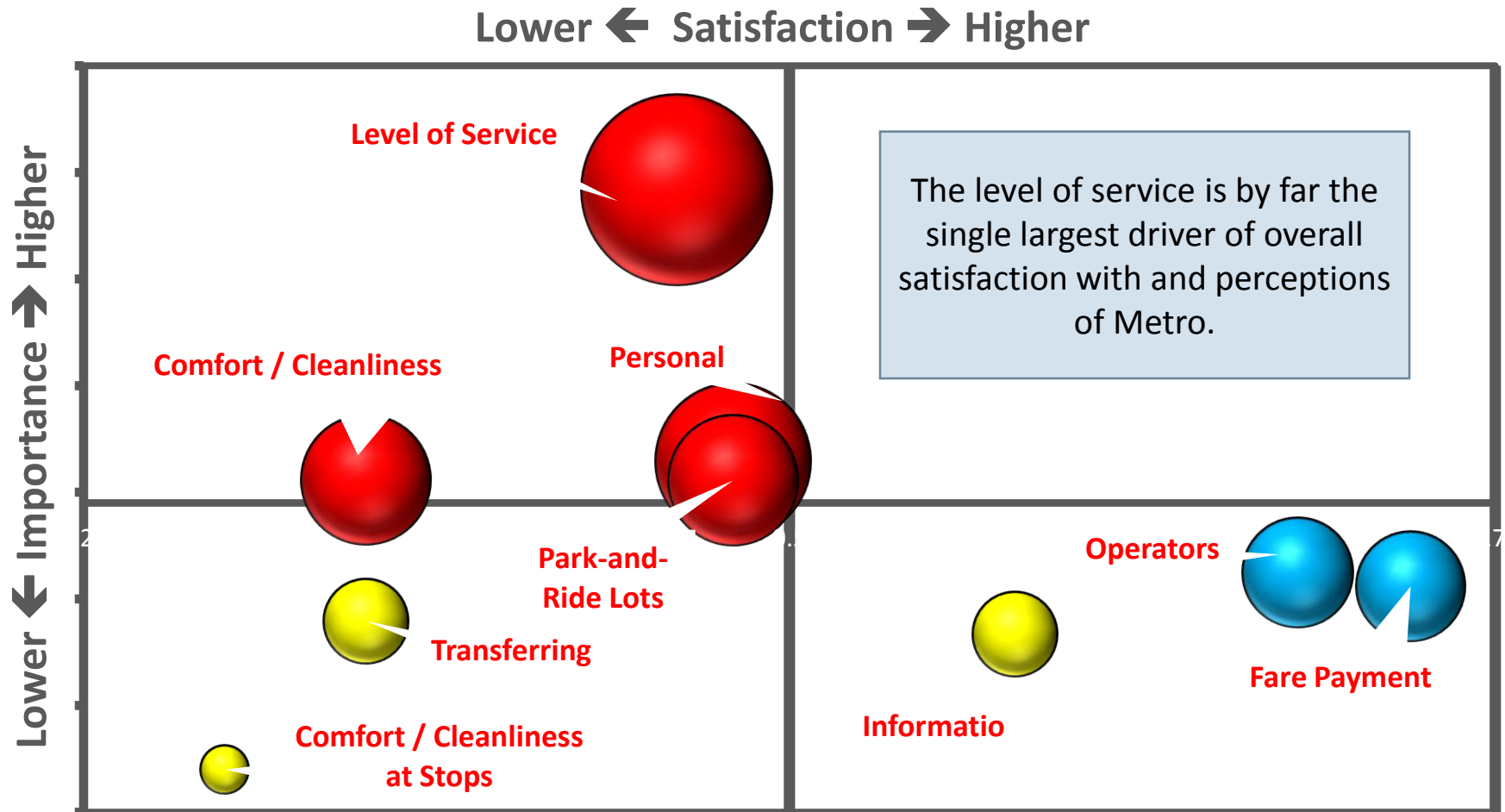
# Service Quality: Definitions of Major Service Dimensions

Dimension		Elements of Service Included
<b>Level of Service</b>	Travel time On-time performance Availability of service	Frequency of service Distance from home to stop
<b>Transferring</b>	Number of transfers Wait time when transferring	Scheduling of connections
<b>Comfort / Cleanliness On-Board</b>	Inside cleanliness Availability of seating Overcrowding	Ease of loading / unloading due to crowding at stops Ease of loading / unloading due to crowding on-board
<b>Comfort / Cleanliness at Stops</b>	Cleanliness of stops and shelters Availability of seating at stops	Availability of shelters Protection from the weather
<b>Park-and-Ride Lots</b>	Personal safety Parking availability	Vehicle security
<b>Metro Drivers</b>	Helpfulness with route information Courtesy Effectively handle problems on vehicles	Operate vehicles safely Smooth operation of vehicle
<b>Fare Payment</b>	Ease of paying fares when boarding Overall satisfaction with ORCA card Ease of loading a pass on ORCA card	Ease of adding value to E-Purse Availability of locations to purchase a pass or add value
<b>Information Sources</b>	Overall ability to get information Availability of information online Availability of information at bus stops Ability to get information via smartphone	Notification of service changes Website posting of delays / problems Ability to provide feedback
<b>Personal Safety</b>	Personal safety on the vehicle during the daytime Personal safety while waiting during the daytime	Personal safety on the vehicle after dark Personal safety while waiting after dark Personal safety in the DT transit tunnel



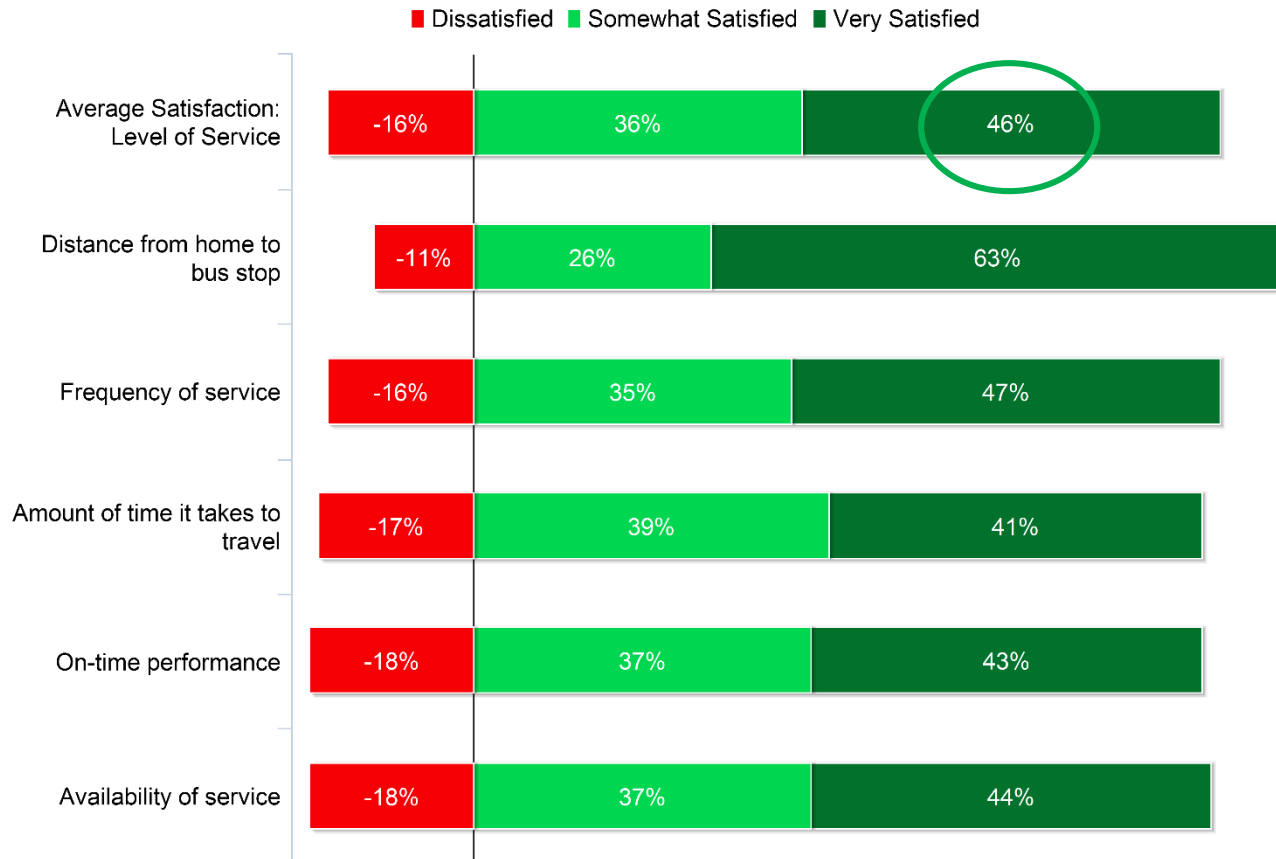


## Key Drivers: Overall Dimensions



## Dimension: Level of Service

The majority of Riders are satisfied with the level of service provided. Moreover, they are more likely to say they are “very” rather than just “somewhat” satisfied.



2015: % Satisfied / Dissatisfied\*

Base: Regular and Infrequent Riders

\*Totals sum to <100% because neutral responses not shown

## Dimension: Personal Safety

Riders are satisfied with safety while riding and waiting for the bus during the day, but most are only somewhat satisfied or dissatisfied with safety after dark.



Base: Regular and Infrequent Riders

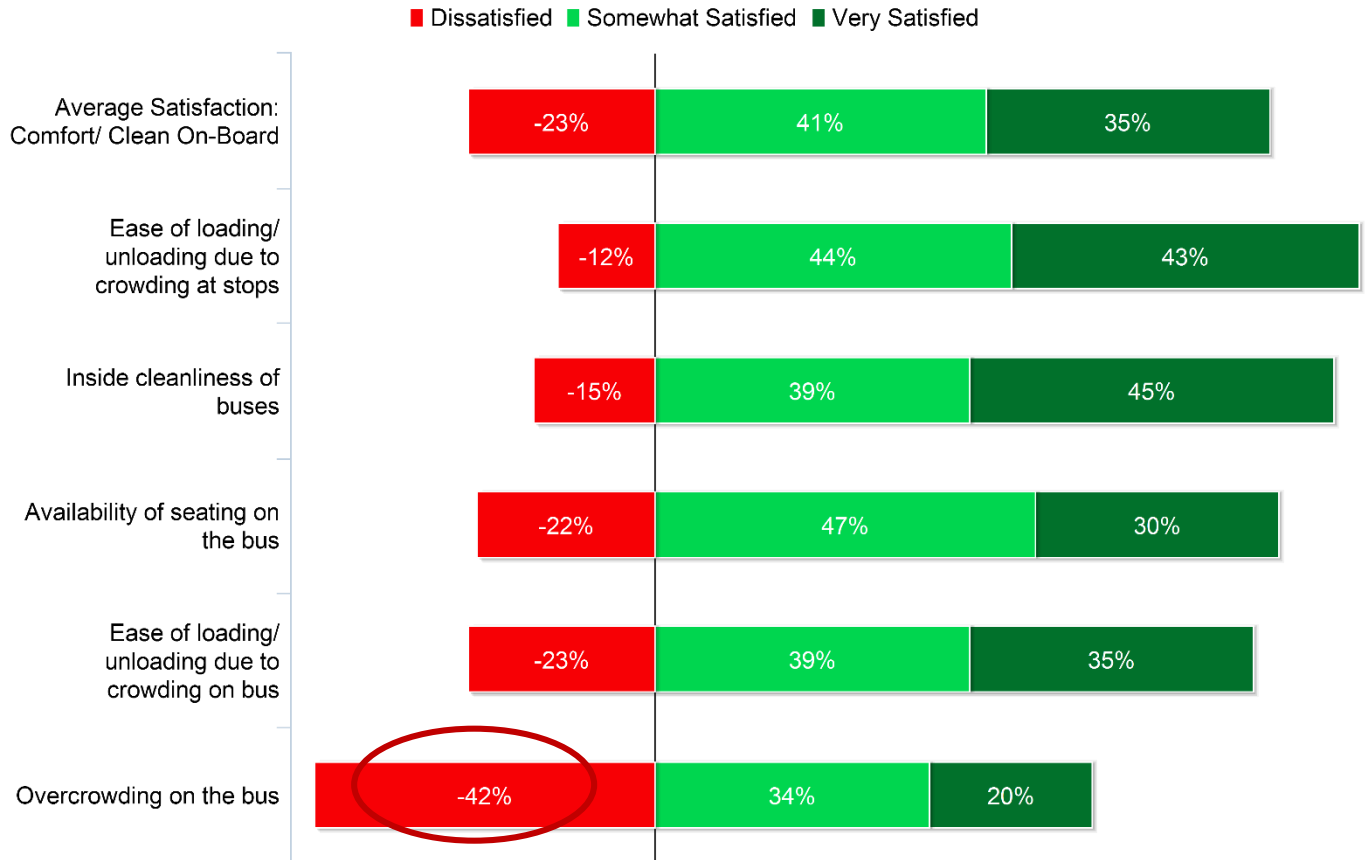
2015: % Satisfied / Dissatisfied\*

\* Totals sum to <100% because neutral responses not shown



## Dimension: Comfort/Cleanliness On-Board

Overcrowding is a major factor in Riders' satisfaction with comfort onboard the bus.



2015: % Satisfied / Dissatisfied\*

Base: Regular and Infrequent Riders

\* Totals sum to <100% because neutral responses not shown

## Dimension: Transferring

Nearly one out of four Riders are dissatisfied with transferring. Wait times and scheduling are greater issues than the number of transfers.



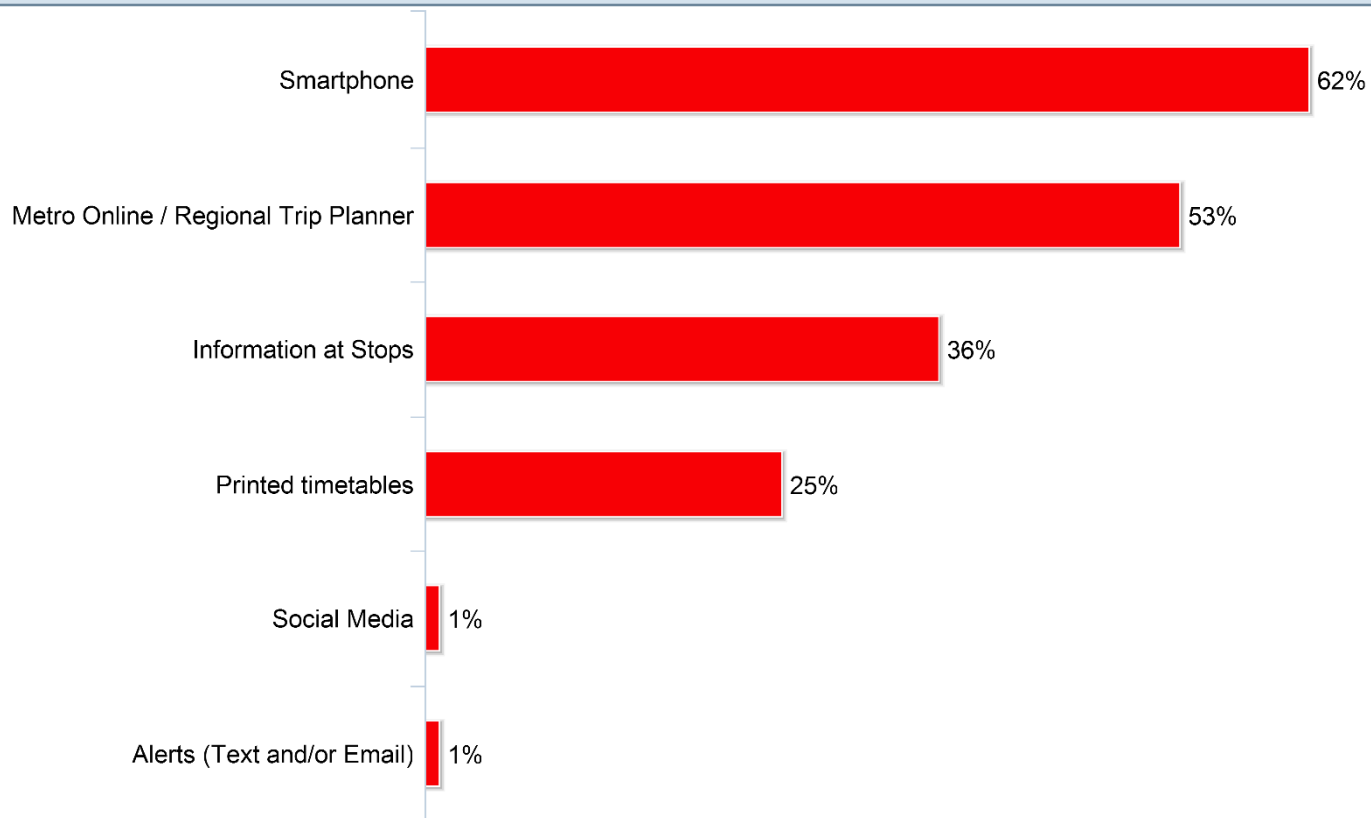
2015: % Satisfied / Dissatisfied\*

Base: Regular and Infrequent Riders

\* Totals sum to <100% because neutral responses not shown

## Information: Frequency of Using Sources to Get Information

Smartphones are now the most frequently used source of information about Metro's routes and schedules.



% of Riders Using to Get Information about Metro (2015)

Question: Which of the following do you use to get information regarding Metro?

Base: Regular and Infrequent Riders



## What is Needed to Increase Ridership



Increased frequency is the most common response provided by Non-Riders who are Potential Riders (feel that riding is appealing would consider riding).

Question: What is the single most important thing that Metro could do to increase your likelihood of using the bus for at least some of your travel? (Multiple responses allowed.)

Base: Non-Riders with Some Potential To Ride (5 or greater on 11-point scale)