

2013 Rider/Non-Rider Survey

Overview of results



July 2014

2013 Rider/Non-Rider Survey: overview of results

Metro Transit places high value on customer feedback. For more than 25 years, we've done annual surveys of King County residents—including both transit riders and non-riders. We do this in order to:

- **Reliably measure our market share** (the percentage of households in King County that have one or more transit riders).
- **Track customer awareness and perceptions** about Metro services and programs.
- **Identify and track demographic characteristics, attitudes, and transit-use behaviors** among commuters and other riders.
- **Gain insights** on topics that are current focuses of Metro's service, marketing, and communications efforts.

Survey method

- Random telephone sample of 2,414 King County residents, age 16+ (More than 30% of interviewees said they only or primarily use a cell phone.)
- Categorized according to:
 - **Rider status** – Regular Riders (5+ trips in past 30 days), Infrequent Riders (1-4 trips in past 30 days) and Non-Riders (no trips in past 30 days)
 - **Area of residence** – Seattle/North, South, and East King County
- A supplemental sample of low-income households (earning less than \$35,000 per year) ensured representation of low-income households in the sample at a rate (27%) roughly equivalent to their percentage in the general population (25%).

Survey topics

All respondents:

- Household ridership
- Transit use
- Safety and security
- Commuter status & travel behavior
- Goodwill and “brand equity”
- Perceptions of downtown Seattle
- Demographics

Riders:

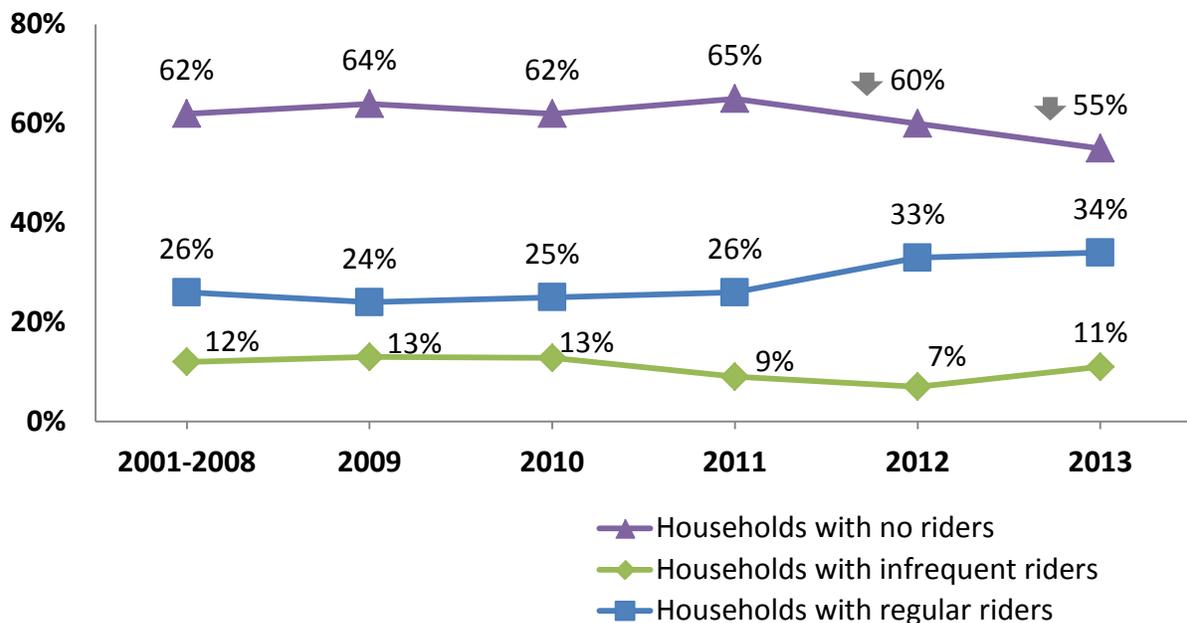
- Frequency
- Transit dependency
- Trip purpose
- Length of ridership
- Satisfaction
- Sources of information
- Service Change Information

Non-riders

- Former ridership on Metro
- Ridership on other regional transit services
- Perceptions of Metro and Metro’s transit service
- Potential ridership

Market share

The percentage of households with riders is at an all-time high—45%, compared to 35% in 2011.



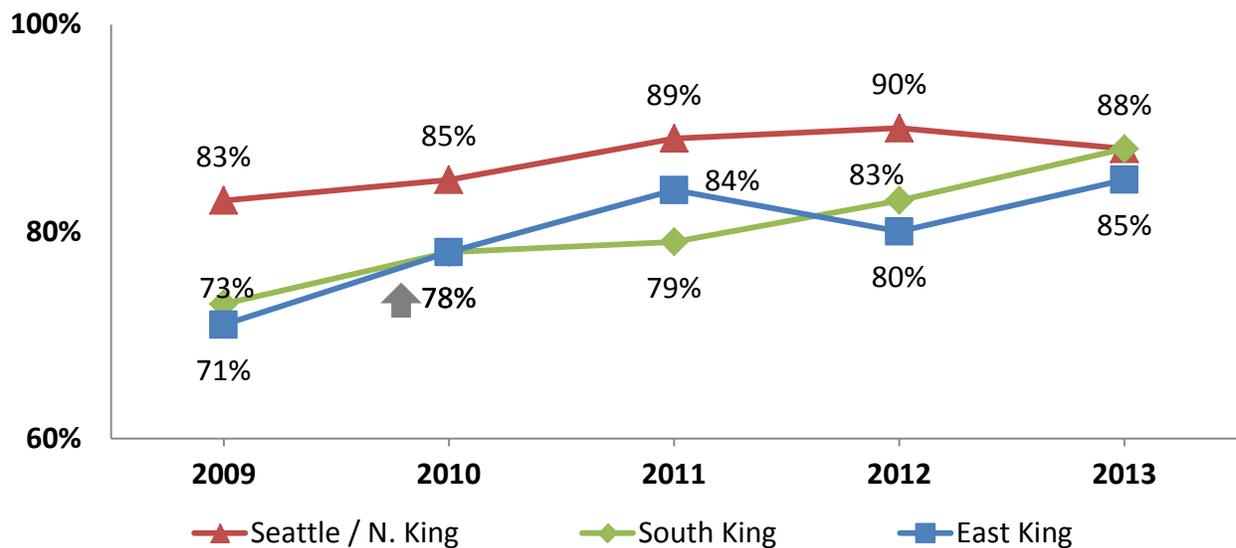
How long riders have been using Metro

The majority of riders (65%) said they've been riding Metro for five or more years. One out of eight said they started riding in the previous year.



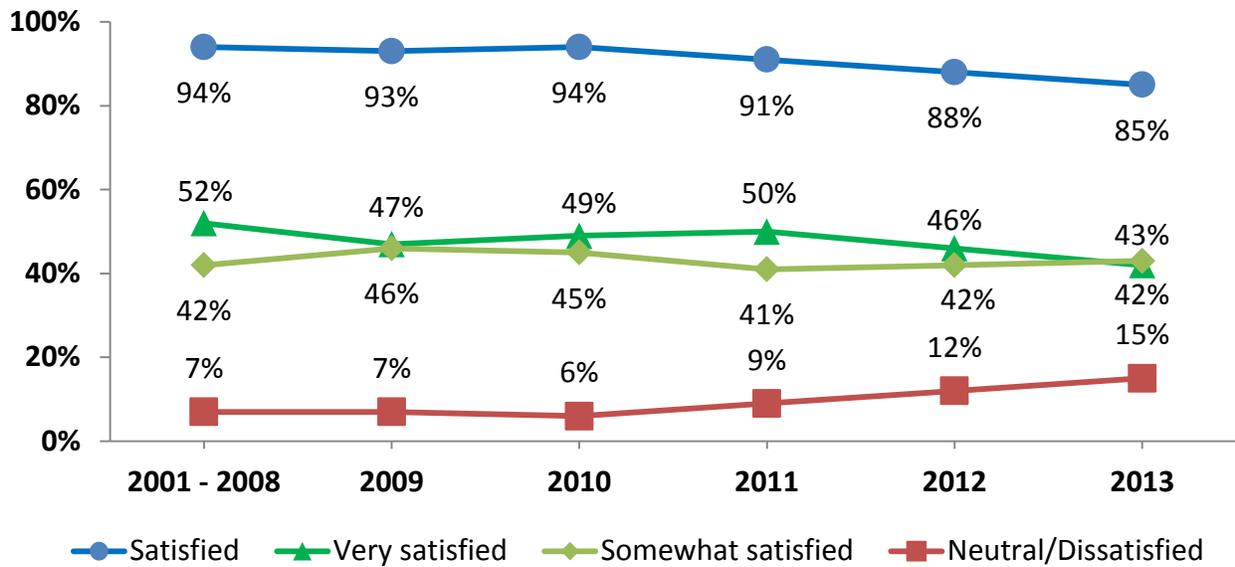
Rider retention

Metro is keeping loyal riders. The percentage of riders who say they've been riding for more than one year has increased significantly in all three areas of residence since 2009.



Overall satisfaction

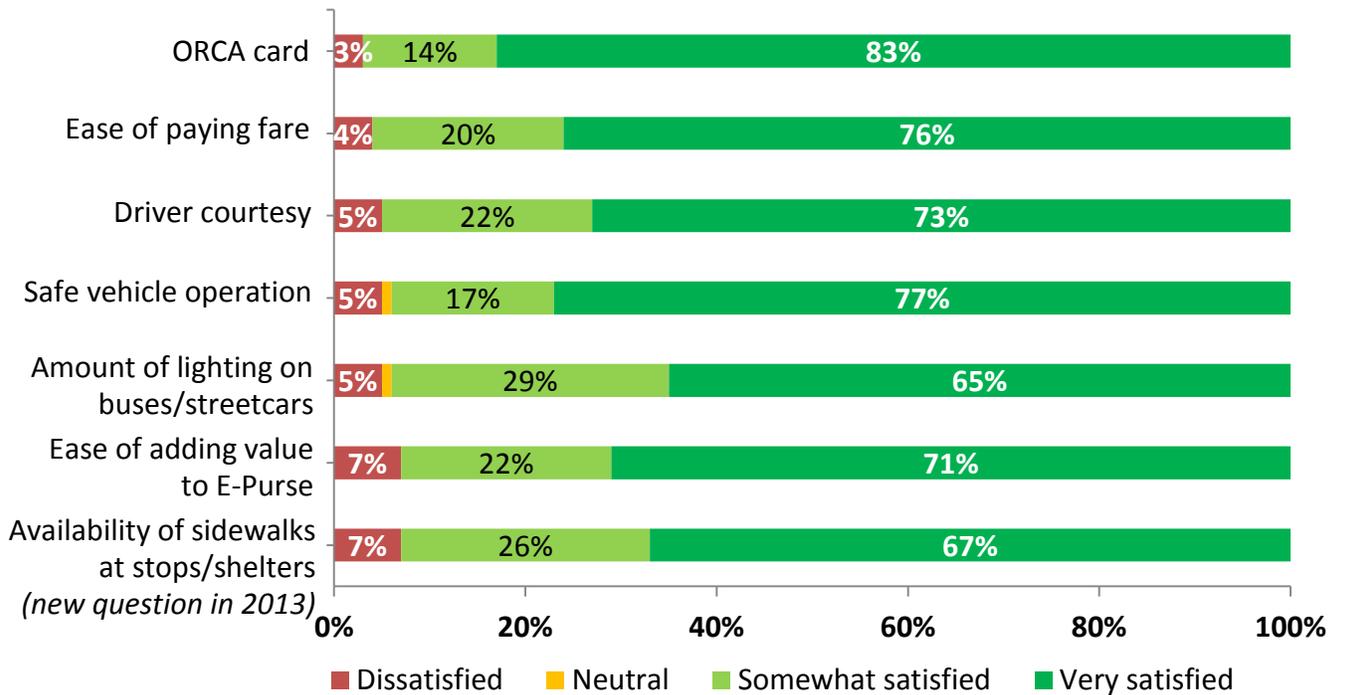
The percentage of customers who say they are satisfied with Metro overall has decreased in the last few years—from 94% in 2010 to 85% in 2013. This decrease appears to be related to factors other than quality of service. Analysis in the report suggests that external influences, including word of mouth and the media, affect overall customer satisfaction.



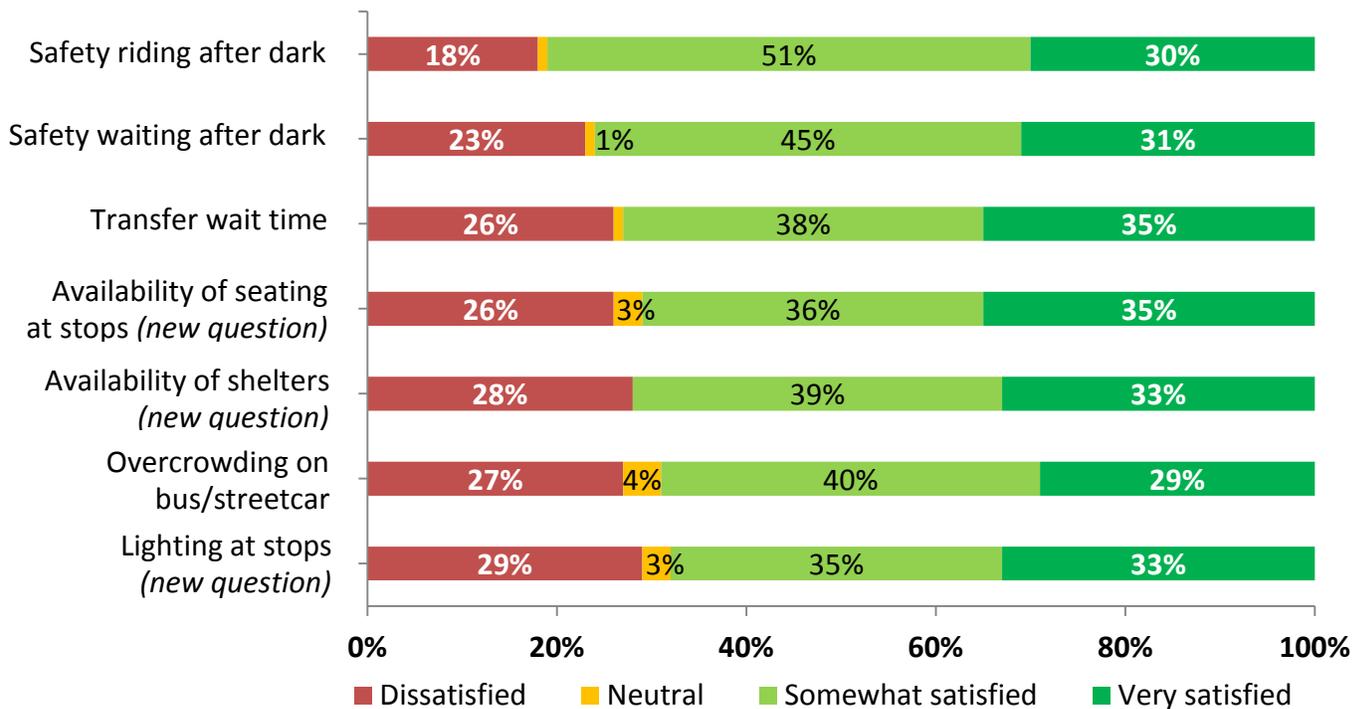
Satisfaction with metro service elements

Regular and infrequent riders told us how satisfied they were with 48 individual elements of service. The following charts show the highest- and lowest-rated of those elements.

Highest-scoring service elements

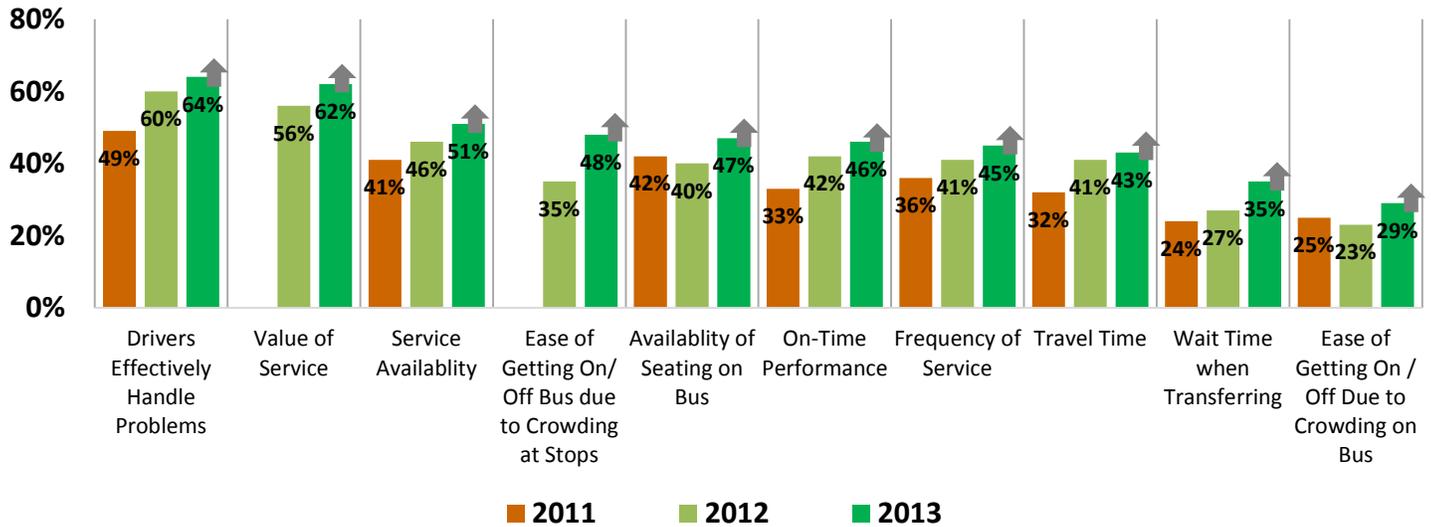


Lowest-scoring service elements



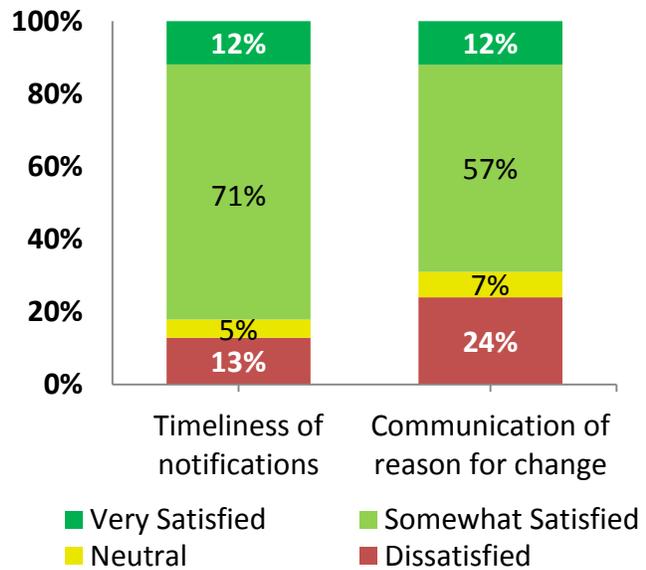
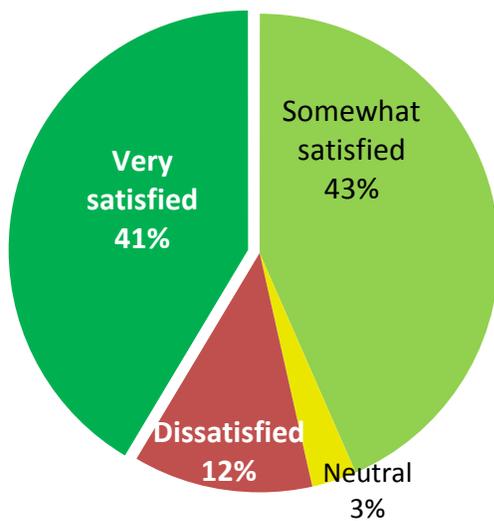
Rider satisfaction has increased significantly over the past several years on a number of specific elements of service that drive overall customer satisfaction.

Significant changes in customers indicating they are very satisfied, 2011-2013



Service change notifications

- Most riders (84%) said they were generally satisfied with Metro’s communications about changes to service.
- Those who said they were less than “very satisfied” expressed more dissatisfaction with our communications about the reasons for change than with when they were told about the change.

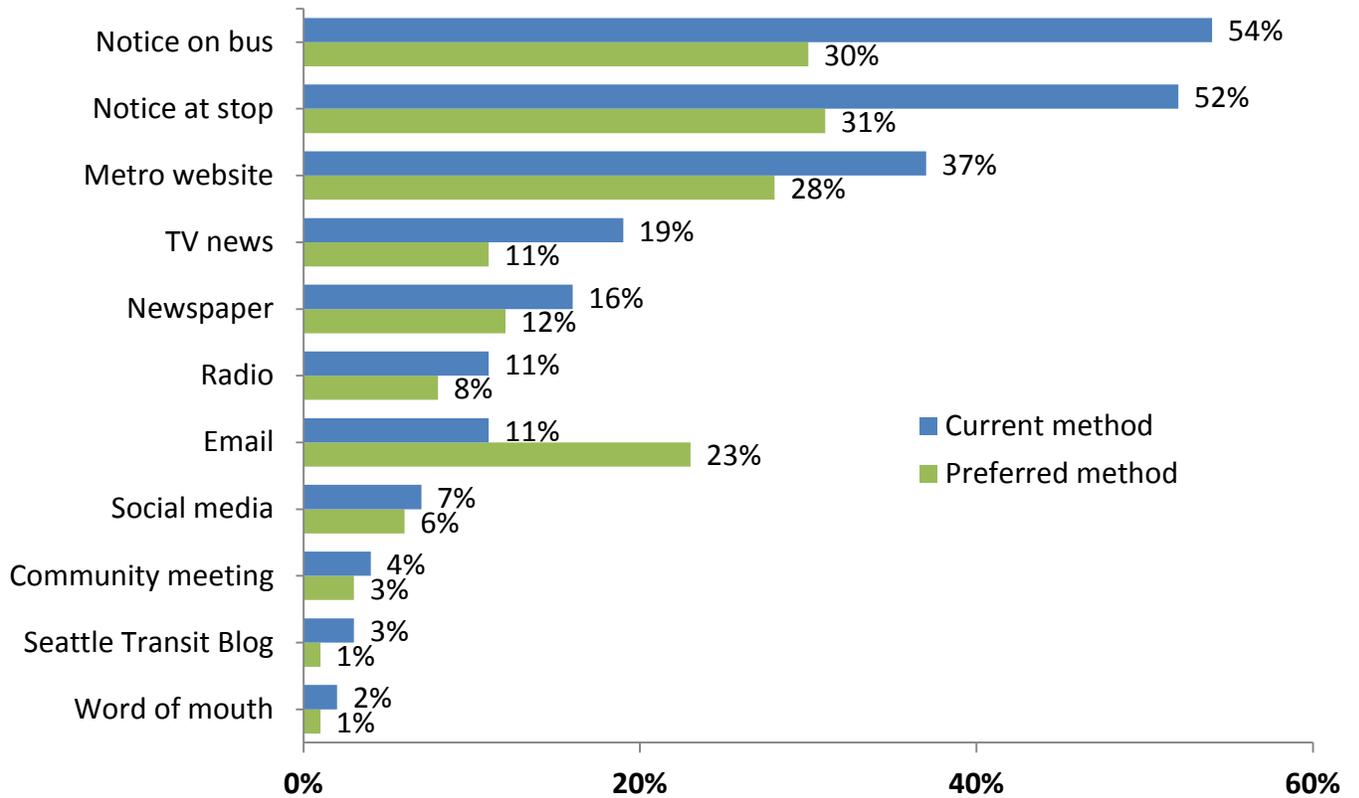


Current and preferred methods of communication

Riders said they get information about services changes from traditional sources—such as notices on the bus or posted at stops—and, to a lesser extent, on Metro’s website.

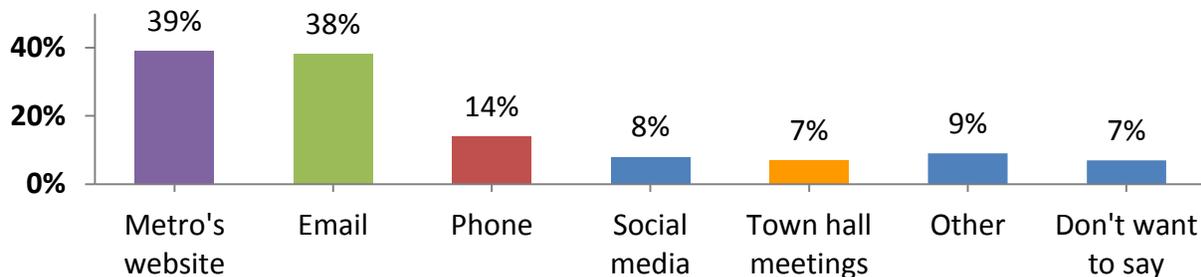
They said they would like to continue getting information via these traditional sources, but a significant percentage also said they would like to get information via email.

How riders currently receive service change information, and how they would prefer to receive it



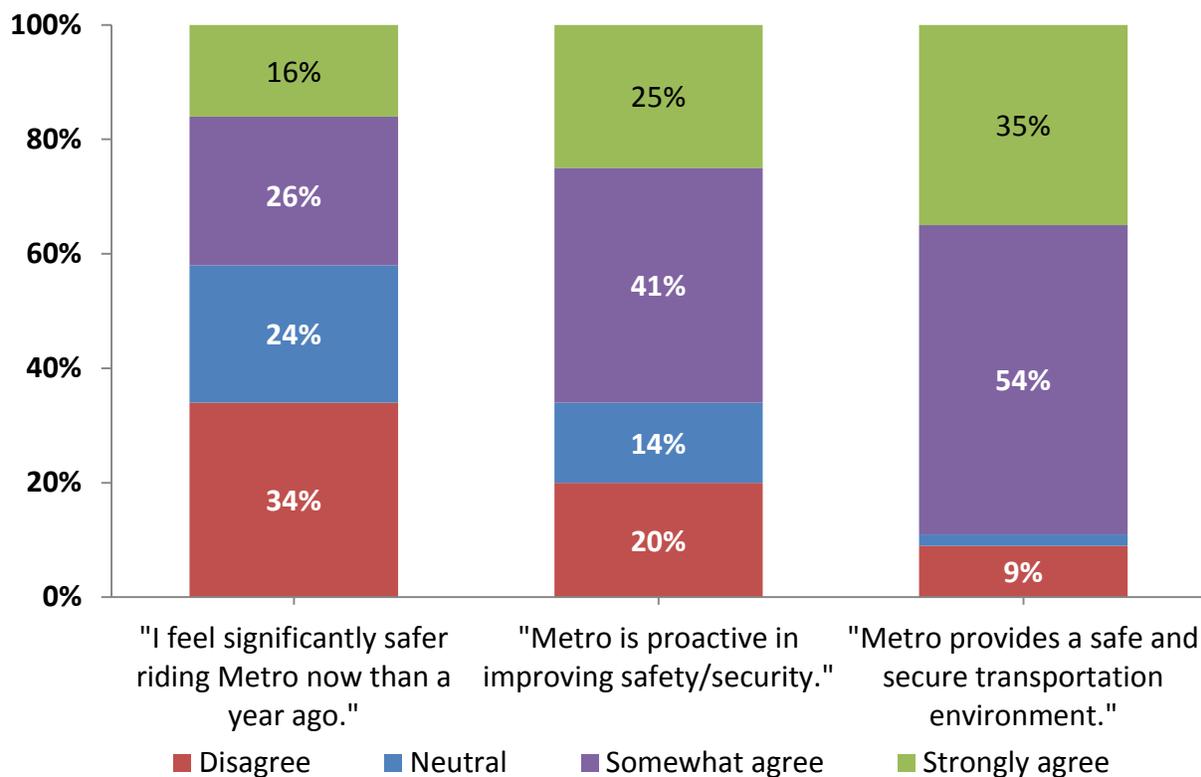
How riders would like to get information about service changes

Respondents said Metro should continue using traditional sources to inform riders about service changes, but they would also like us to use more direct approaches such as email or pushing information to an app on their smartphones.



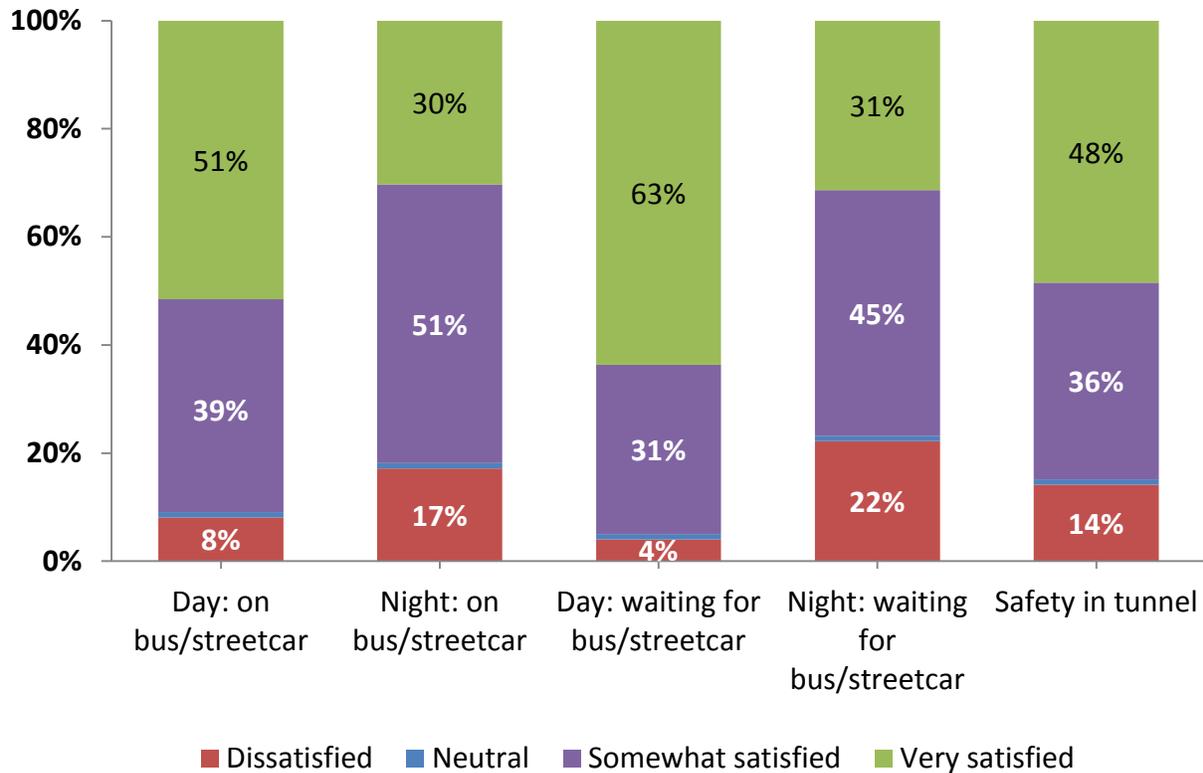
Rider perceptions about personal safety

- Slightly more than one-fifth of riders (22%) said they avoid riding Metro because of concerns about safety.
- More than two-fifths (42%) said they felt safer riding than they did a year previously, but one-third (34%) said they did not—and almost a quarter (24%) said they had mixed feelings.
- The majority (66%) of riders credited Metro with being proactive in its efforts to improve safety and security, but this number was a significant decrease from 2012 (73%).
- Nearly all riders (89%) agreed with the statement that Metro provides a safe and secure transportation environment. There was no change in overall agreement with this statement, but the percentage saying they strongly agreed decreased significantly compared to 2012.



- Riders said they were generally satisfied with safety and security during the day.
- Riders said they were significantly less satisfied with safety and security at night than in the daytime.
- Riders were more concerned with safety while waiting than while riding.

- After trending upward since 2010, rider satisfaction with safety in the Downtown Seattle Transit Tunnel decreased in 2013.



Overall perceptions of—and goodwill toward—Metro

We added new questions to the 2013 survey to gain more insight into riders’ and non-riders’ perceptions of Metro, beyond their perceptions of our service. These measures provide information about Metro’s overall brand equity and associated goodwill.

Expectations

The majority of riders and non-riders reported that they both expect and feel they receive (or in the case of non-riders, would receive) high-quality service. Riders were significantly more likely than non-riders to have positive attitudes and high expectations regarding Metro, yet more than half of all non-riders expressed positive attitudes toward Metro.



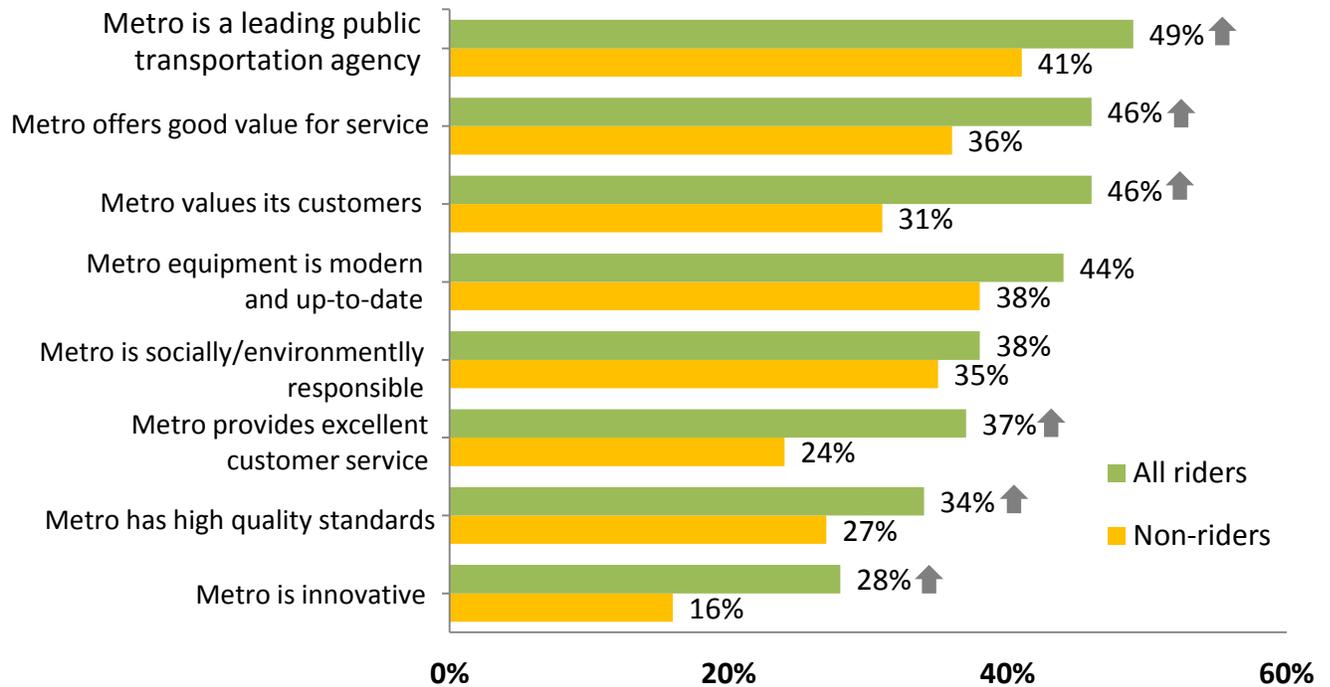
Brand equity

King County residents in general have a somewhat positive image of Metro. They are most likely to agree that Metro:

- Operates equipment that is up-to-date
- Offers good value for the service it provides
- Is a leading transportation agency
- Is socially and environmentally responsible
- Values its customers

They are least likely to agree that Metro is an innovative agency.

Metro's brand equity



Measures of goodwill

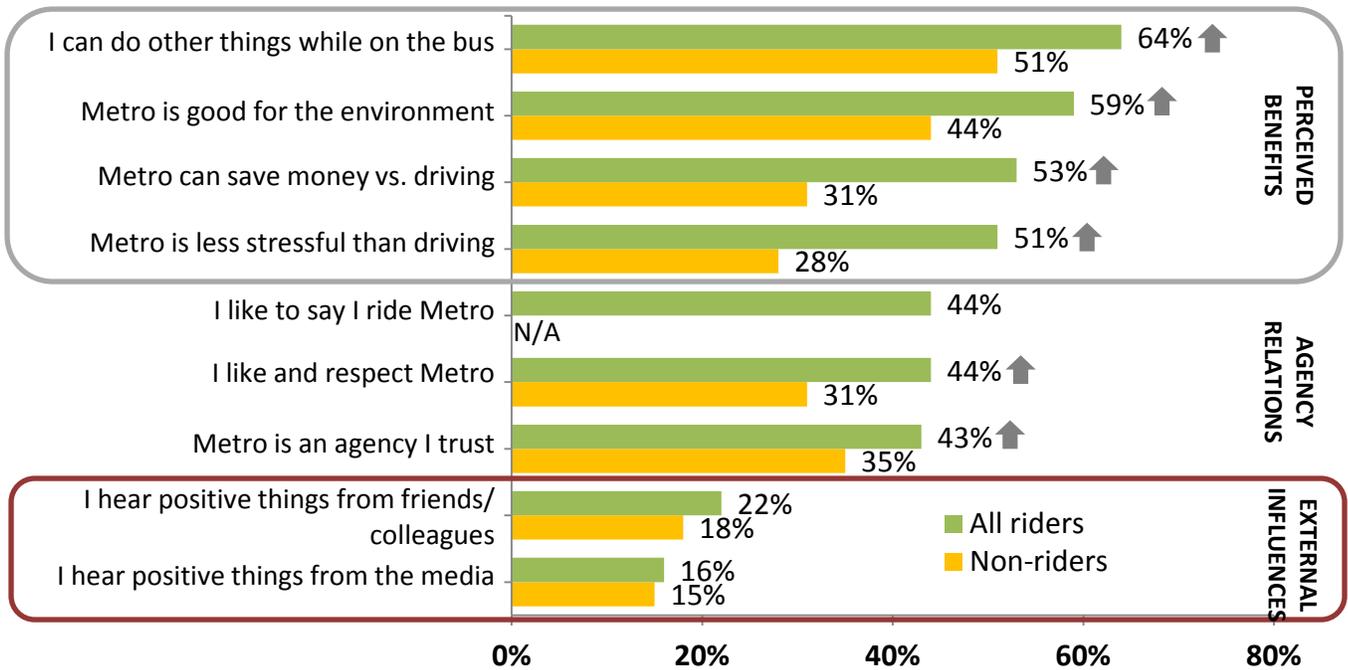
King County residents generally see Metro as benefitting riders and the community.

They are most likely to agree that:

- You can do other things when riding (it's not just "dead time")
- When riding you are doing something good for the environment

The next chart shows the percentage of respondents who said they strongly agree with statements about the perceived benefits of riding Metro, their liking for and trust of Metro as an agency, and external influences—what they hear about Metro from other people and the media.

Percentage who “Strongly Agree” that...



- Riders and non-riders reported significant differences on the **perceived benefits** of Metro.
- **Agency relations** have the biggest impact on overall perceptions of Metro.

External influences

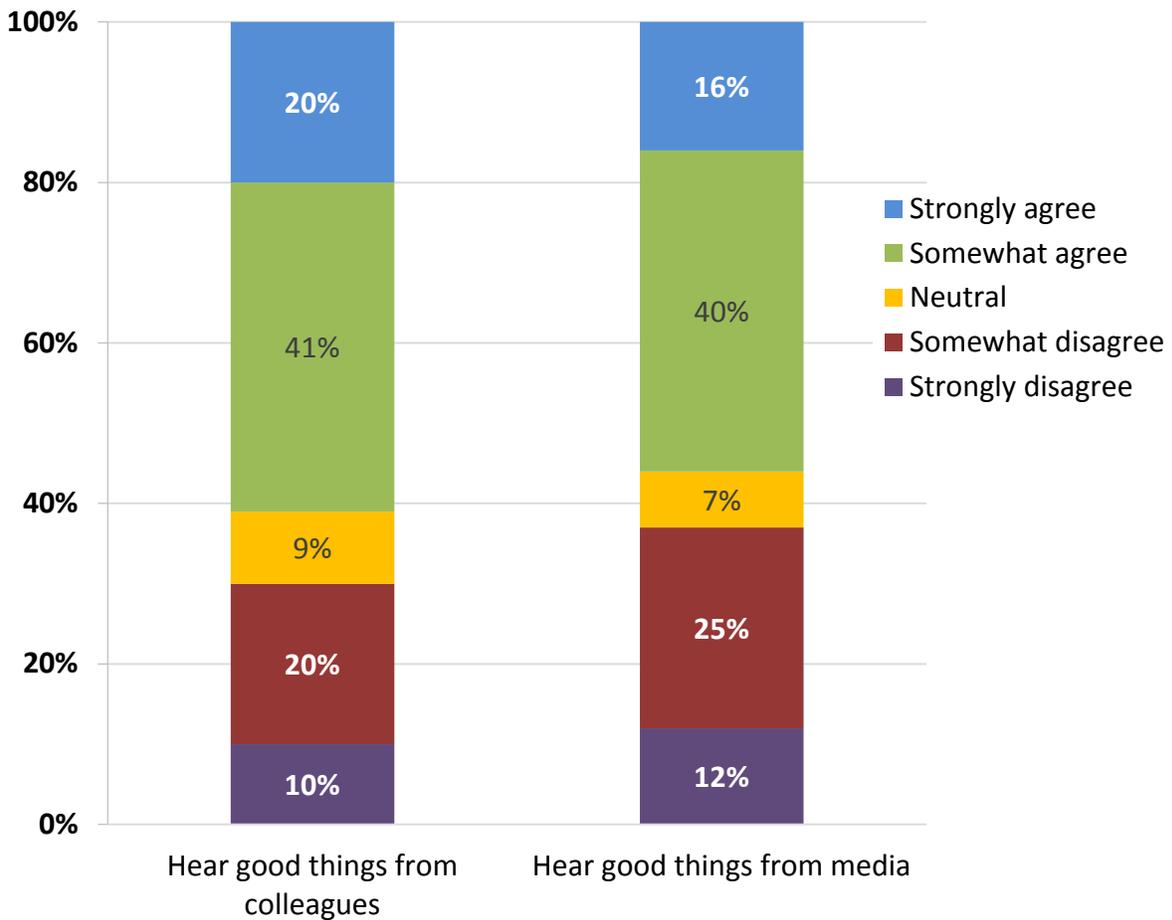
People hear positive or negative things about Metro from family members, friends, colleagues, and the media. What they hear can decrease or increase their feelings of goodwill toward Metro.

- 61% of respondents said they generally hear good things about Metro from friends and colleagues.
- 56% said they generally hear good things about Metro from the media.
- 21% said they generally hear negative things.
- 6% said they generally hear neither positive nor negative things.

(See table and chart on next page.)

		Hear good things from friends		
Hear good things from the media		Agree	Neutral	Disagree
	Agree	45%	3%	9%
	Neutral	2%	4%	2%
	Disagree	14%	2%	19%

Extent to which residents hear good things about Metro

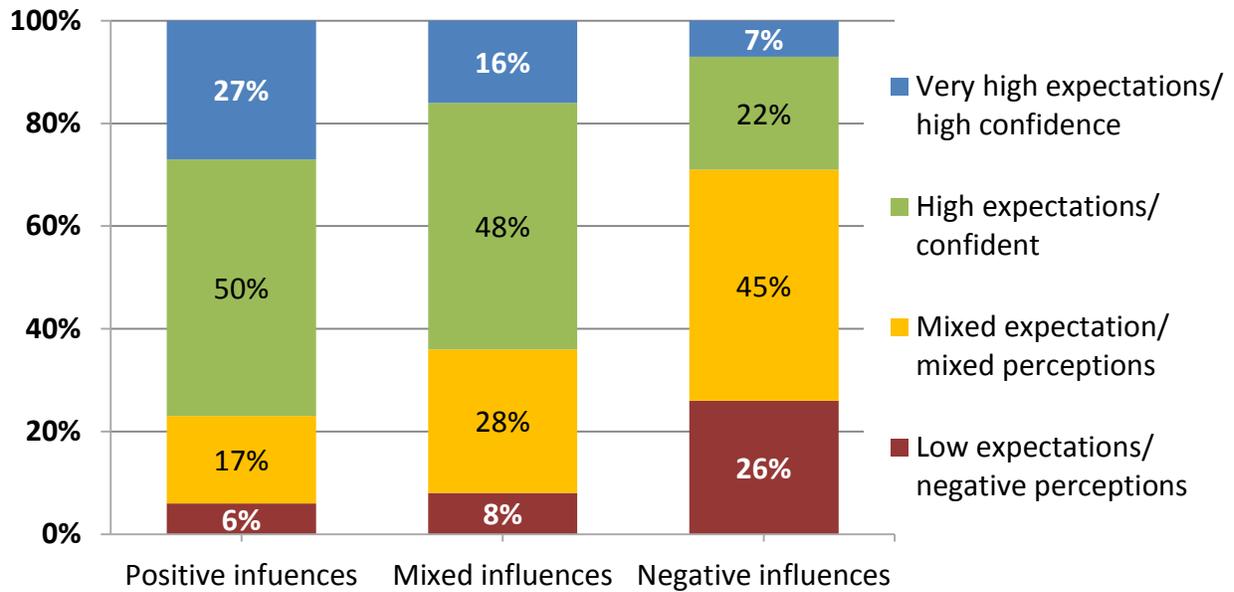


Effect of external influences on goodwill

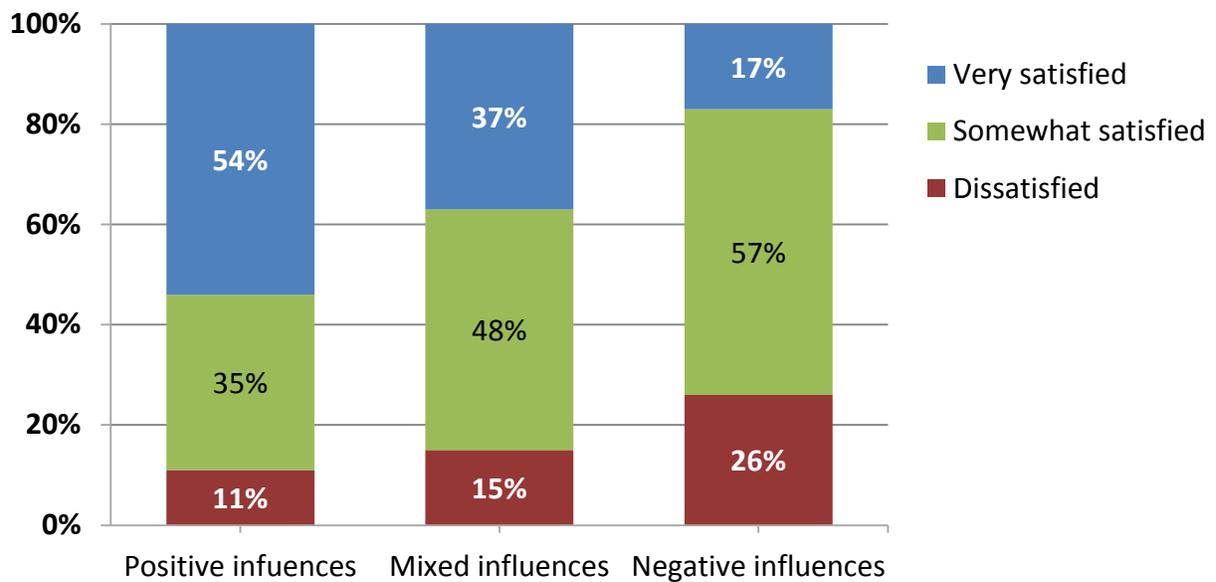
Hearing negative things about Metro clearly influences people’s overall perceptions of the agency.

People who heard good things about Metro were more likely to have high expectations of us. Those who heard negative things were more likely to have negative expectations. Similarly, riders who heard good things about Metro described themselves as being more satisfied that those who heard negative things.

Perceptions of Metro and external influences



Rider satisfaction and external influences



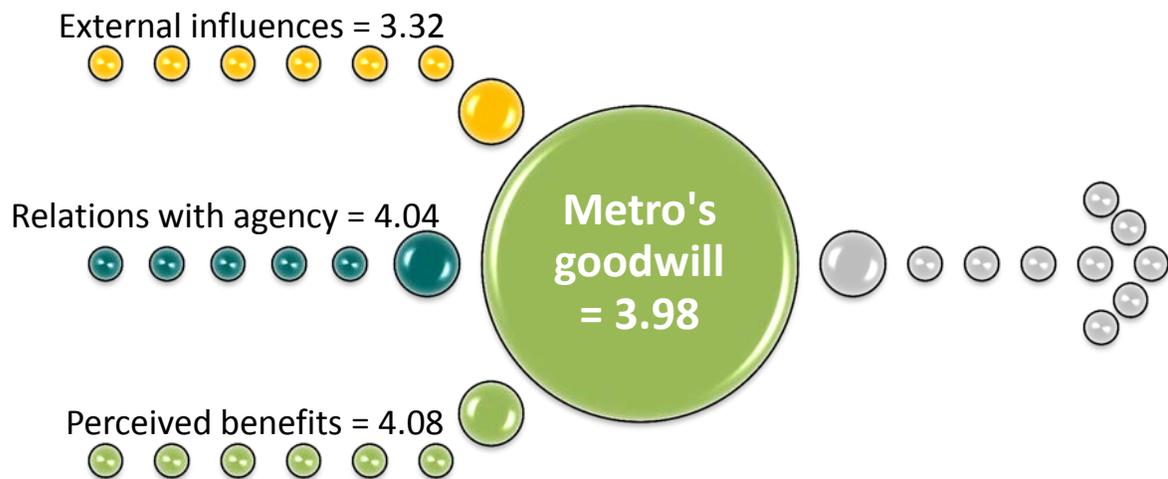
- More than a quarter of residents who heard negative things about Metro said they had low expectations of the agency and negative perceptions of how well it delivers service.

- More than three-quarters of those who heard positive things expressed positive expectations and impressions.
- More than half of riders who heard positive things about Metro described themselves as “very satisfied” with riding.
- Just over a quarter (26%) of those who heard negative things about Metro described themselves as “dissatisfied.”

Goodwill index

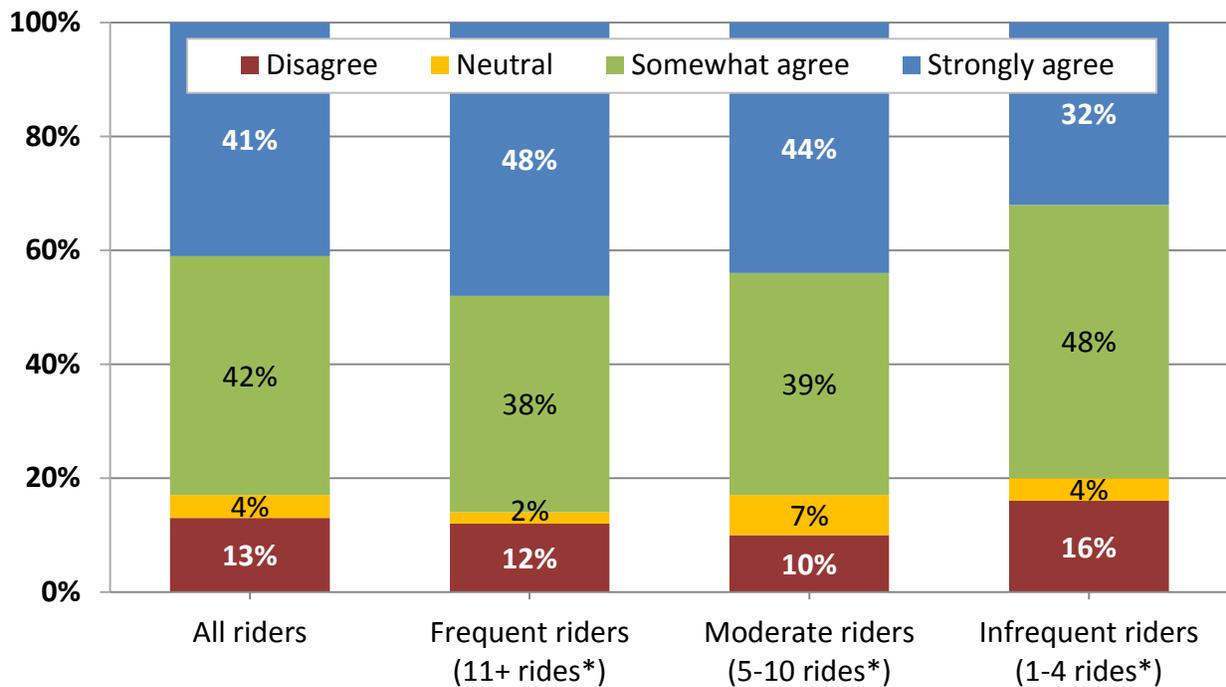
We developed an overall goodwill index based on the extent to which external influences, relations with Metro, and perceived benefits influence overall perceptions of Metro.

Metro has a relatively high degree of goodwill, as indicated by a goodwill metric of 3.98 (on a five-point scale):



Extent to which riders like to say they ride Metro

Although riders reported being less satisfied with Metro overall, the majority (83%) said they like to tell people they ride Metro.



* Number of rides taken on Metro in the past 30 days before taking the survey.