King County METRO

King County
Metro Transit

2014 Rider Survey
Final Report

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Research Conducted for:
King County
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By:

Northwest Research Group, LLC

Prepared by:

King County Metro Transit Division
Strategy and Performance

Project / Program Manager
Lori Mimms

Senior Projects Manager
Chuck Sawyer

Northwest Research Group, LLC
Rebecca Elmore-Yalch, Principal / Managing Director
Nathan Wiggin, Project Director

For comments or questions contact:

Lori Mimms
206-477-5864
Lori.Mimms@kingcounty.gov

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EXECUTIVE SUMMARY

Project Overview

King County Metro Transit places high value on customer feedback. For more than 25 years, Metro has conducted an annual telephone survey of King County residents—both those who ride Metro buses and those who do not.

Objectives

- Provide a reliable measure of market share
- Track awareness and perceptions of Metro services among both Riders and Non-Riders
- Identify and track demographic characteristics, attitudes, and transit use among Riders and Non-Riders
- Provide insight about topics related to Metro's service, marketing, and communications strategies

The study is widely used by different Metro sections. It provides important information on current and past performance and helps provide direction for future strategies.

Methodology

The survey uses a robust dual-frame sample (calling both landline and cell-phone numbers) to reach a representative sample of all King County households. Riders are surveyed annually and Non-Riders biennially (typically in odd-numbered years). In 2014, 1,201 interviews were completed with three Rider segments:

Segment	Definition	Total Sample (n)
Regular Riders	Riders who took five or more one-way rides in the past 30 days	861
Infrequent Riders	Riders who took 1-4 one-way rides in the past 30 days	241
Lost Riders	People who used to ride but stopped as a result of the fall 2014 service change	99

The sample was stratified using the boundaries of Metro's former planning areas. A minimum number of interviews with Regular Riders was set for each geographic area (400 in Seattle / North King County and 200 each in South and East King County). Actual interview totals for each area are shown at right.

Seattle / N. King n= 570

East King n = 326

South King n = 305

Key Findings

MARKET SHARE
Metro represents an important mode of transportation for a significant percentage of King County's population.

Metro gained significant market share in 2012 and again in 2013.The share of households with Regular Riders increased slightly in 2014 while the share of households with Infrequent Riders decreased. The overall share of Rider households between 2013 and 2014 is unchanged.

Seattle / North King County represents Metro's largest market. While small geographically it has the highest number of households and the highest percentage of households with Riders. More than half of all Riders live in this area.

South and East King County are similar in size and market share. A greater percentage of Riders live in South versus East King County due to larger household sizes.

The share of Regular Rider households in South and East King County has risen significantly over the past several years.

Legend: Rider Households; REGULAR Rider Households; INFREQUENT Rider Households

Rider Households: 38%, 35% (▼), 40% (▲), 45% (▲), 44%
REGULAR Rider Households: 25%, 26%, 33% (▲), 34%, 35%
INFREQUENT Rider Households: 13%, 9% (▼), 7% (▼), 11% (▲), 9% (▼)

2010 2011 2012 2013 2014

▲ / ▼ *indicates a statistically significant change from previous year*
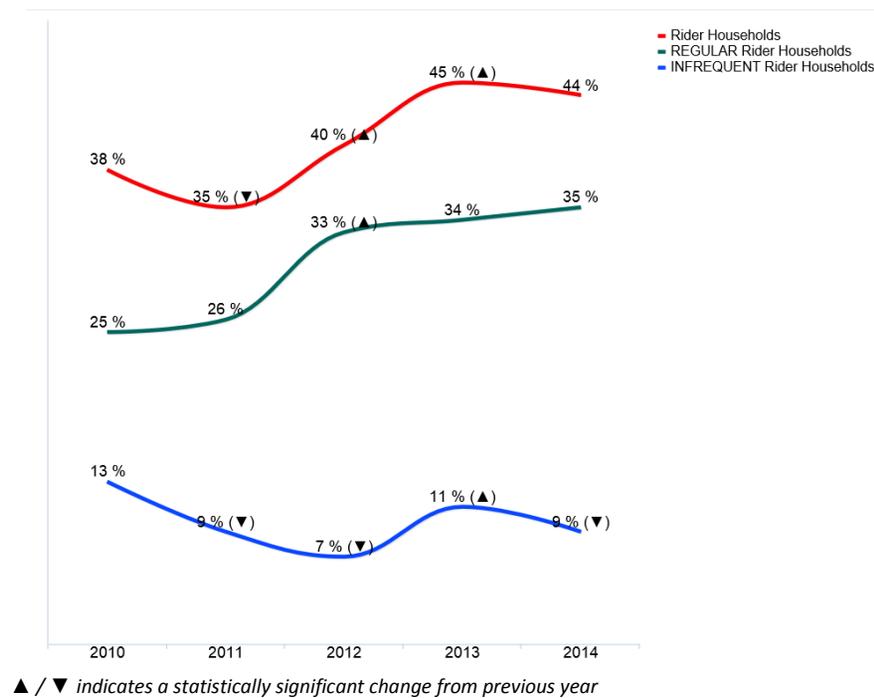
Percentage of…	Seattle / N. King	South King	East King
Households	39%	35%	35%
Rider households	62%	31%	31%
Population who are Riders	55%	27%	27%
Metro Riders	52%	26%	22%

Transit Use

Most Metro Riders are "choice" Riders—they have other transportation choices.
Only one out of ten Riders lack access to a vehicle and rely on Metro for all or most of their travel.

The extent to which Riders rely on Metro for most of their transportation decreased significantly in 2014.

The majority of Riders have access to one or more vehicles. Even among those who rely on Metro for all or most of their transportation needs, most have access to a vehicle for some travel.

Legend: All of Your Transportation Needs / Most of Your Transportation Needs

- 2012: 9% / 25%
- 2013: 7% / 29% (▲)
- 2014: 9% / 22% (▼)
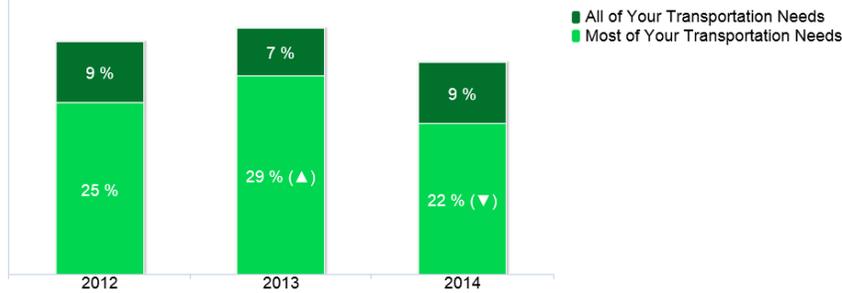
	(a) All / Most of Your Transportation	(b) Some of Your Transportation Needs	(c) Very Little of Your Transportation Needs
1+ Vehicles	70% (b▼,c▼)	97% (a▲)	96% (a▲)
0 None	30% (b▲,c▲)	3% (a▼)	4% (a▼)

▲ / ▼ *indicates a statistically significant between respondent groups*

Metro serves those who primarily use transit to commute to work or school
as well as those who use transit for non-work travel.

The majority of Riders have primarily used Metro to commute to work or school, but a significant percentage use Metro for non-commute travel.

Those using Metro primarily for commute trips represent Metro's core market, averaging more than three times as many one-way trips per month than those who primarily use Metro for non-commute trips. So just over half of all Riders account for 80 percent of monthly trips.

Commute / Non-Commute

- 2010: 53% / 47%
- 2011: 56% / 44%
- 2012: 56% / 44%
- 2013: 60% (▲) / 40% (▼)
- 2014: 56% (▼) / 44% (▲)

Number of One-Way Rides in Past 30 Days

- Commute: 23.0
- Non-Commute: 7.0
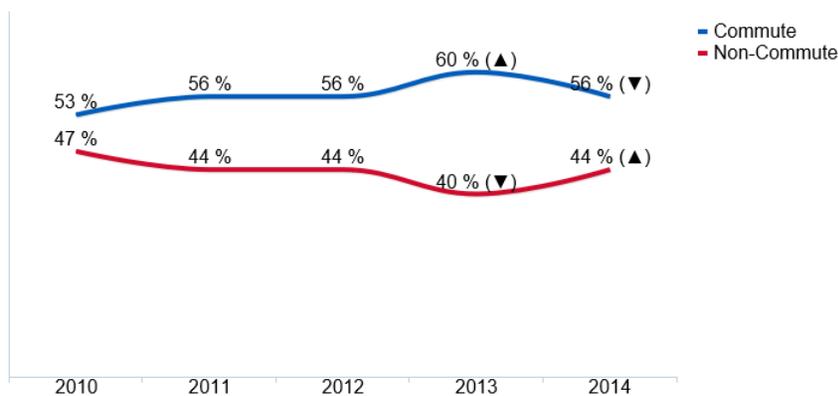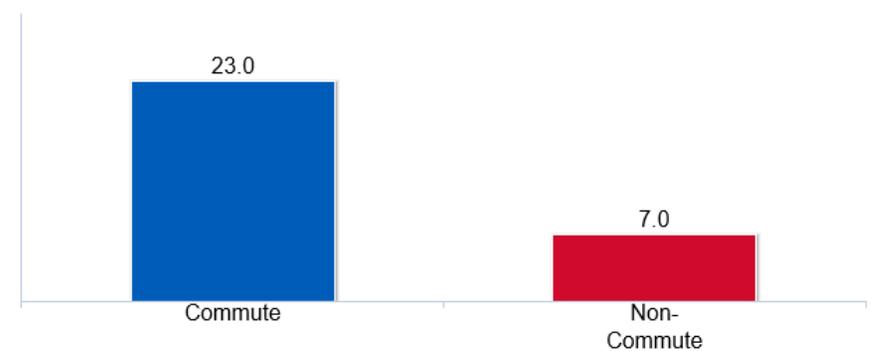
Transit Use

Metro serves three primary Rider segments, based on the number of monthly trips.
Frequent Regular Riders are Metro's core market

The distribution of these segments has remained relatively stable over the years. Two out of five Riders are Frequent Regular Riders—taking 11 or more one-way trips per month.

With the exception of Frequent Regular Riders, the average number of one-way trips taken has been relatively stable.

Trips taken by Frequent Regular Riders peaked in 2012 and have been decreasing since then. Frequent Regular Riders account for 85% of all trips.

■ Frequent Regular Riders ■ Moderate Regular Riders ■ INFREQUENT Riders

Year	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
2014	41 %	19 % (▼)	41 %
2013	41 %	22 %	37 %
2012	43 %	21 %	37 %
2011	43 % (▲)	20 %	36 % (▼)
2010	35 %	17 %	48 %

— REGULAR Riders
— Frequent Regular Riders
— Moderate Regular Riders
— INFREQUENT Riders

Frequent Regular Riders: 30.0, 32.1 (▲), 34.5 (▲), 33.7, 32.3

REGULAR Riders: 23.8, 25.7 (▲), 26.9, 26.1, 24.5

Moderate Regular Riders: 7.4, 7.3, 7.5, 7.1, 7.5

INFREQUENT Riders: 2.2, 2.2, 2.3, 2.3, 2.3

2010   2011   2012   2013   2014

Fare Payment

The split between ORCA and cash has remained relatively stable over the past two years.
Riders who use Reduced Regional Fare Permits increased significantly in 2014.

Riders are more than twice as likely to use an ORCA card than pay with cash—62% compared to 27%. ORCA use includes the 49% of Riders with an adult or youth fare on their ORCA cards as well as 13% with a Regional Reduced Fare Permit on their ORCA cards and 7% with a U-PASS.

The percentage of ORCA users with a pass on their cards decreased somewhat (significant at the 90% confidence level), with a corresponding increase in the percentage with an E-Purse. Consistent with the increase in older Riders surveyed in 2014, significantly more Riders currently have an RRFP on their ORCA Card.

Year	Total ORCA*	Cash/Tickets
2014	68 %	27 %
2013	66 %	28 % (▲)
2012	66 %	22 %

■ Total ORCA* ■ Cash/Tickets

* Includes ORCA Cards, RRFP on ORCA Card, U-PASS

	2014	2013
Total E-Purse	41 % (▲)	35 %
Total Pass	28 %	33 %
RRFP	21 % (▲)	15 %
U-PASS	10 %	11 %
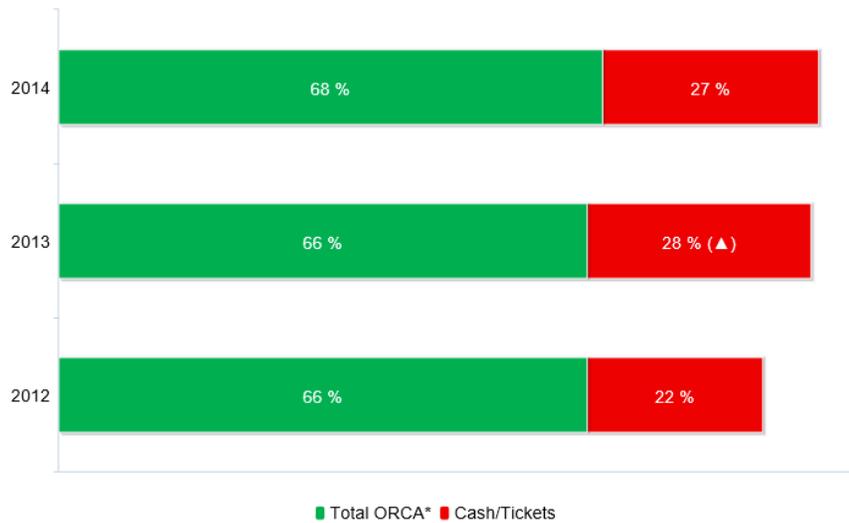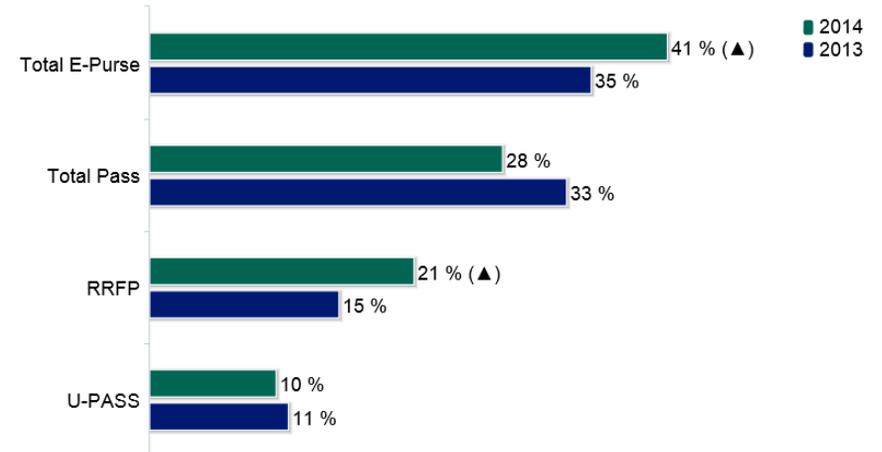
Information Sources

Riders rely heavily on online sources to get information about Metro, but printed timetables and information at stops are also widely used. A relatively small percentage of Riders call or use Metro Alerts.

Riders use multiple sources to get information about Metro. The most frequently used were online sources and information at stops.

Frequently / Sometimes

Source	Percent
Metro Online / Regional Trip Planner	67 %
Information at Stops	66 %
Smartphone	52 %
Printed Timetables	51 %
Alerts (Text and/or Email)	17 %
Customer Service Call Center	12 %
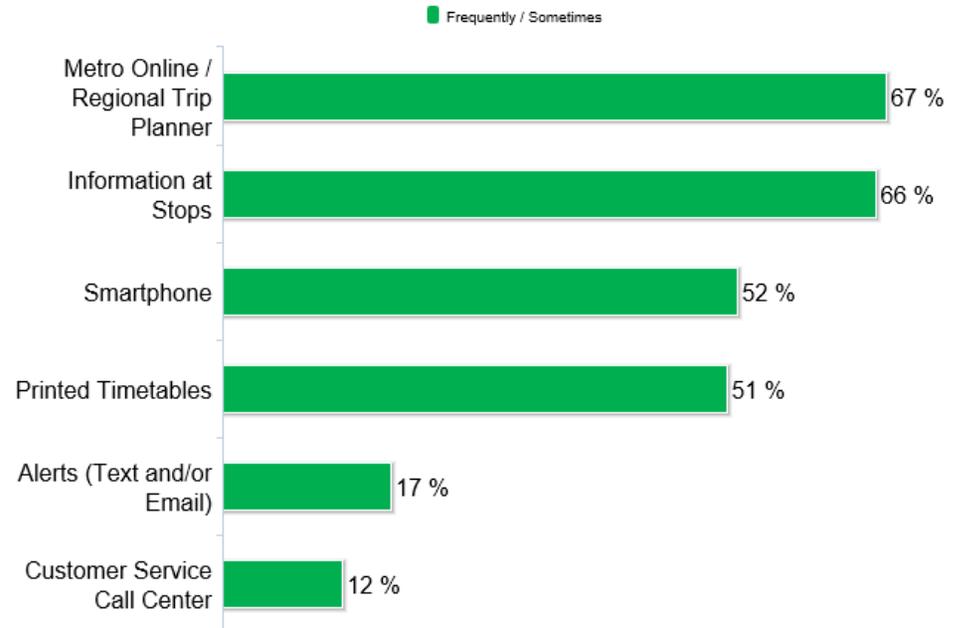
Overall Satisfaction with Metro

Despite significant service changes immediately before the survey data collection period, overall satisfaction with Metro increased significantly.

After several years of decreasing satisfaction, the overall percentage of Satisfied Riders (either "Very Satisfied" or "Somewhat Satisfied") increased.

- Notably, this increase was due to an increase in Riders who said they were "Very Satisfied."

— Total Satisfied (Very & Somewhat)

94 %   91 % (▼)   88 %   85 % (▼)   90 % (▲)

| 2010 | 2011 | 2012 | 2013 | 2014 |

■ Very Satisfied ■ Somewhat Satisfied ■ Total Dissatisfied

	2010	2011	2012	2013	2014
Very Satisfied	49 %	50 %	46 %	42 % (▼)	46 % (▲)
Somewhat Satisfied	45 %	41 %	42 %	43 %	43 %
Total Dissatisfied			-10 %	-14 % (▲)	-10 % (▼)
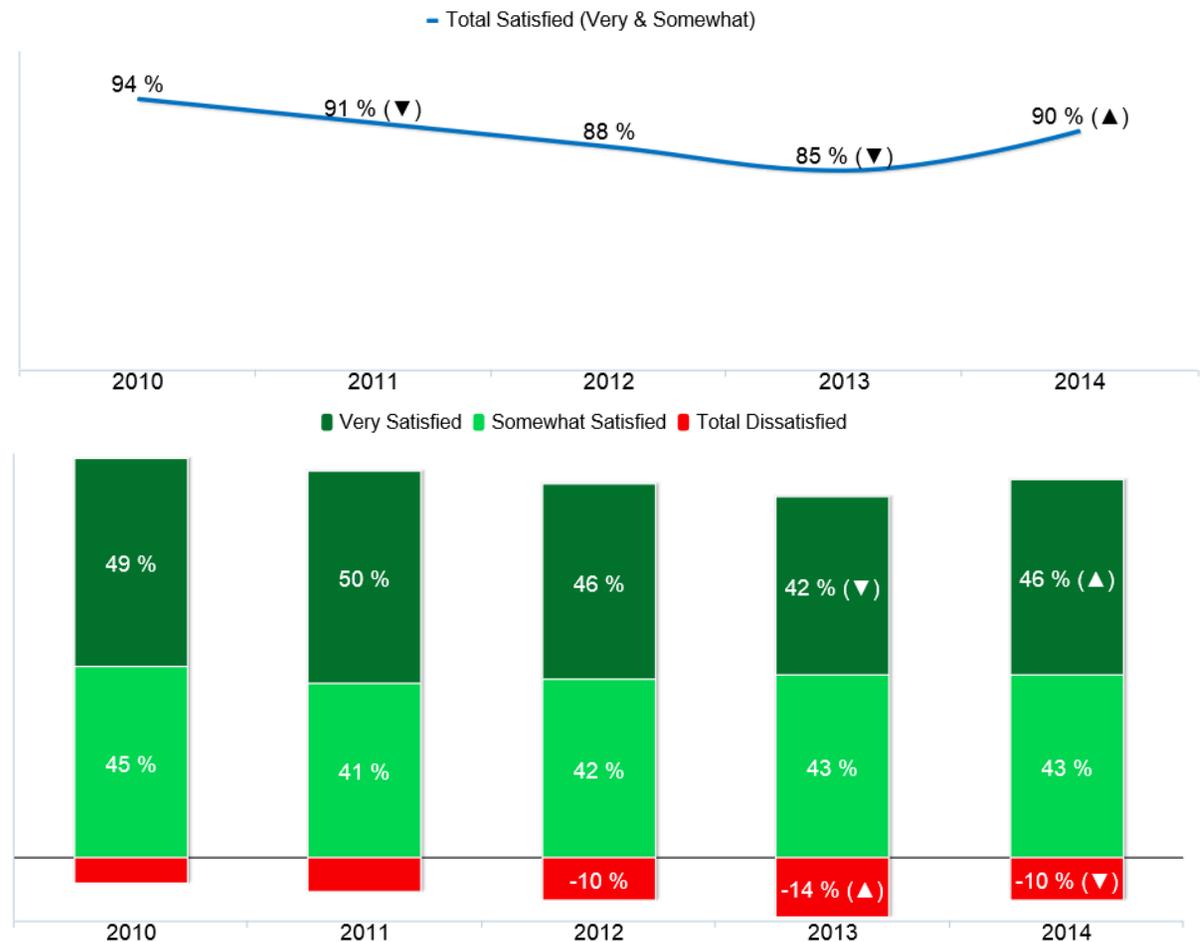
In 2014, the sum of very (46%) and somewhat (43%) satisfied (46.1% + 43.4%) does not be the same as total (very and somewhat) satisfied due to rounding (89.5% rounds to 90%).

Riders' Expectations of and Advocacy for Metro

Riders have significantly more positive impressions of Metro.

The majority of Riders have high expectations for service quality and generally feel that Metro can deliver on these expectations. • At the same time, three out of ten Riders have low or mixed impressions and expect to encounter problems when riding.	 ■ Expect High Quality and Confident Can Deliver ■ Expect High Quality and Generally Positive Can Deliver ■ Have Low or Mixed Impressions and Expect Problems 23 % 47 % -30 % Expectations of Metro
Riders are significantly more likely to strongly agree that they "like to be able to say they ride Metro." This statement serves as a proxy for Riders' willingness to recommend riding and/or advocate for supporting Metro.	**Agree/Disagree: I like to be able to say I ride Metro** ■ Strongly Agree ■ Somewhat Agree 2013: 41 %, 42 % 2014: 56 % (▲), 32 % (▼)
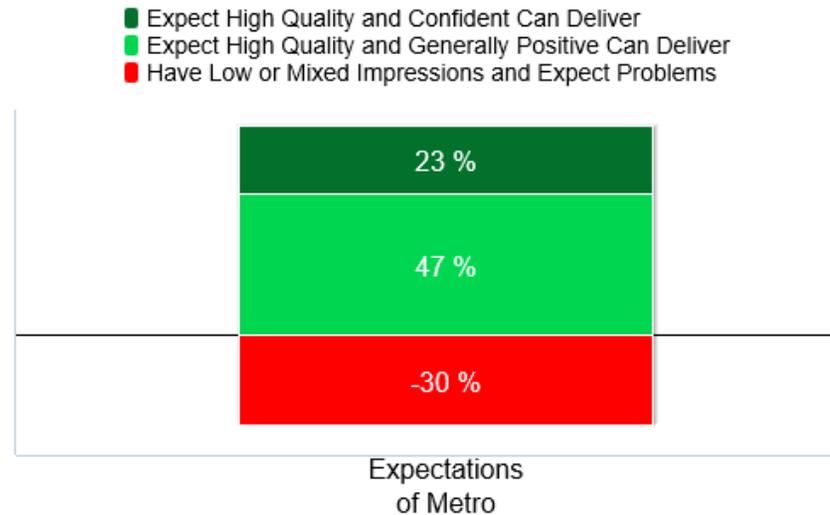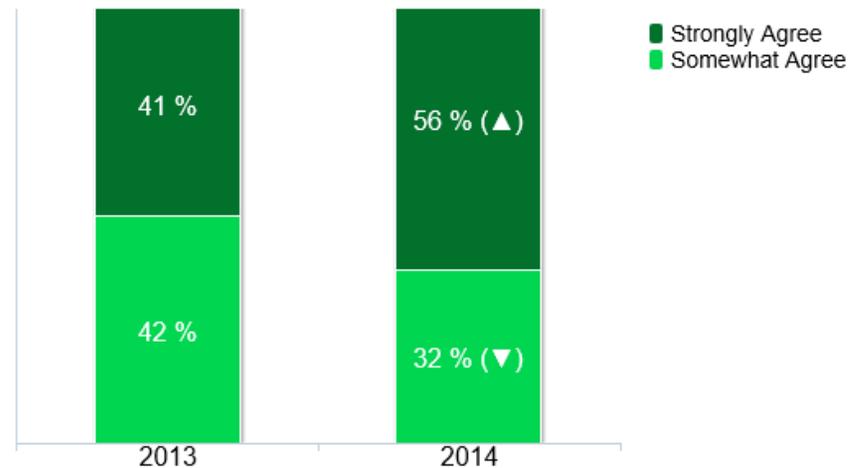
Satisfaction with Service

Despite significant service changes immediately before the survey data collection period, overall satisfaction with Metro increased significantly.

Riders were asked their satisfaction with 36 specific elements of service. These next tables provide details of the percentage of Riders who are very satisfied with these elements of service and changes in the percentage of Very Satisfied Riders from 2013.

Satisfaction increased for some of the individual elements of service.

Notably, the percentage of Very Satisfied Riders increased significantly for several elements of Personal Safety.

- Riders continue to be less satisfied with Daytime Safety on Buses than at Stops.
- While the percentage of Very Satisfied Riders increased significantly for Onboard Safety after Dark, this continues to be one of the lowest rated elements of service (< 40% Very Satisfied).

	Very Satisfied	
	2013	**2014**
Fare Payment: Ease of paying fares when boarding	76%	81% (▲)
Information: Availability of information Metro Online	60%	71% (▲)
Personal Safety: At stops daytime	63%	70% (▲)
Personal Safety: Onboard daytime	51%	59% (▲)
Personal Safety: Onboard after dark	30%	37% (▲)

Satisfaction with Service

Satisfaction remained relatively stable for most elements of service.

Several elements of service related to Personal Safety and Comfort and Cleanliness at Stops continue to be some of the lowest-rated elements of service (< 40% Very Satisfied).

	Very Satisfied	
	2013	**2014**
Fare Payment: ORCA card	83%	87%
Fare Payment: Ease of loading a pass on ORCA card	68%	76%
Drivers: Operate vehicles safely	77%	74%
Fare Payment: Ease adding value to your E-Purse	71%	68%
Drivers: Helpfulness	64%	66%
Information: Overall ability to get	60%	63%
Personal Safety: In downtown transit tunnel	48%	51%
P&R Lots: Lighting	54%	48%
Comfort / Cleanliness Onboard: Cleanliness	46%	47%
P&R Lots: Personal safety	52%	46%
Information: Availability at stops	-	45%
Comfort / Cleanliness at Stops: Ease of loading and unloading	49%	45%
Comfort / Cleanliness at Stops: Cleanliness	38%	41%
LOS: Travel time	43%	41%
P&R Lots: Vehicle Security	40%	40%
Comfort / Cleanliness at Stops: Shelters	33%	35%
Comfort / Cleanliness at Stops: Lighting	33%	33%
Personal Safety: At stops after dark	31%	28%

Satisfaction with information at bus stops was added in 2014, so no comparable ratings are available for 2013

Satisfaction with Service

Satisfaction decreased for some elements of service. Most of these elements of service are also some of the lowest rated elements (<40% very satisfied).

- Notably, the percentage of Very Satisfied Riders decreased for four out of the five key elements of service related to the Level of Service (LOS) provided as well as both aspects of transferring.

The percentage of Very Satisfied Riders decreased for several aspects of Comfort and Cleanliness Onboard and At Stops.

- All are related to overcrowding.

	Very Satisfied	
	2013	**2014**
Drivers: Handle problems on vehicles effectively	64%	55% (▼)
Fare Payment: Availability of locations to purchase a pass / add value to E-Purse	61%	54% (▼)
LOS: Distance home to stop	64%	52% (▼)
LOS: On-time performance	46%	41% (▼)
LOS: Availability of service	51%	40% (▼)
Comfort / Cleanliness Onboard: Availability of seating	47%	40% (▼)
LOS: Frequency of service	45%	36% (▼)
Comfort / Cleanliness Onboard: Ease of loading and unloading	48%	36% (▼)
Transferring: Number of transfers	44%	35% (▼)
P&R Lots: Parking availability	45%	34% (▼)
Comfort / Cleanliness at Stops: Seating	35%	29% (▼)
Transferring: Wait time	35%	26% (▼)
Comfort / Cleanliness Onboard: Overcrowding	29%	21% (▼)

Perceptions of Personal Safety

Consistent with increased satisfaction with Personal Safety, Riders perceptions of Metro's efforts to improve safety have improved.

The majority of Riders do not avoid riding because of concerns about safety.

The extent to which Riders avoid riding has decreased significantly from 2012, the first year this question was asked.

■ Avoid Riding Due to Concerns About Safety - No

(a) 2014	80 % (c▲)
(b) 2013	78 %
(c) 2012	77 %

Nearly half of all Riders strongly agree that Metro provides a safe and secure transportation environment. This number is up significantly from 2013, and at its highest level of agreement since the question was first asked in 2012.

■ Agree / Disagree: Provides a safe and secure transportation environment - Strongly Agree

2014	49 % (▲)
2013	35 % (▼)
2012	42 %
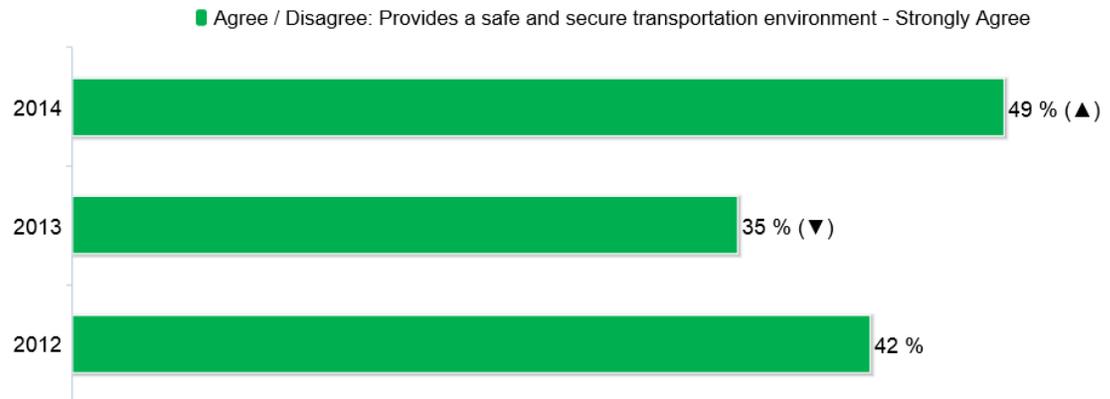
Perceptions of Personal Safety

One of three Riders strongly agree that Metro is proactive in improving safety and security, and the increase in the percentage who strongly agree is consistent with other increases in positive perceptions of Metro and its efforts to improve safety.

Agree / Disagree: has been very proactive in improving safety and security - Strongly Agree

Year	Strongly Agree
2014	33 % (▲)
2013	26 %
2012	27 %

Riders are increasingly likely to strongly agree that it is safe to ride in downtown Seattle.

- Riders continue to express concerns about safety using public transportation in downtown Seattle when it is dark.

Agree/Disagree: Safe to use transit in DT Seattle daytime

	2013	2014
Strongly Agree	61 %	73 % (▲)
Somewhat Agree	33 %	24 % (▼)
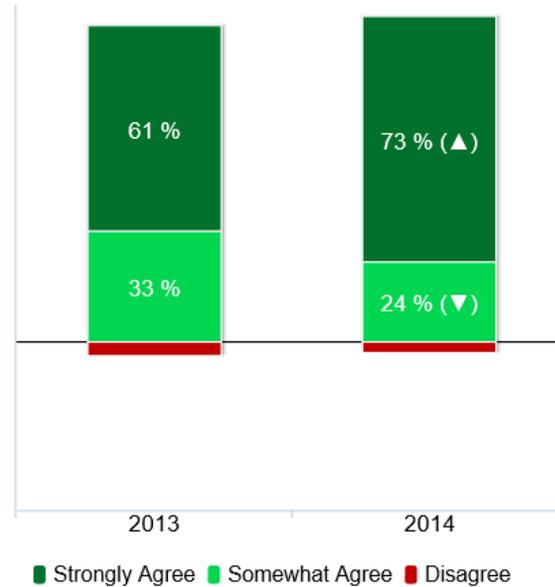
Agree/Disagree: Safe to use transit in DT Seattle after dark

	2013	2014
Strongly Agree	16 %	28 % (▲)
Somewhat Agree	41 %	43 %
Disagree	-38 %	-25 % (▼)

■ Strongly Agree ■ Somewhat Agree ■ Disagree
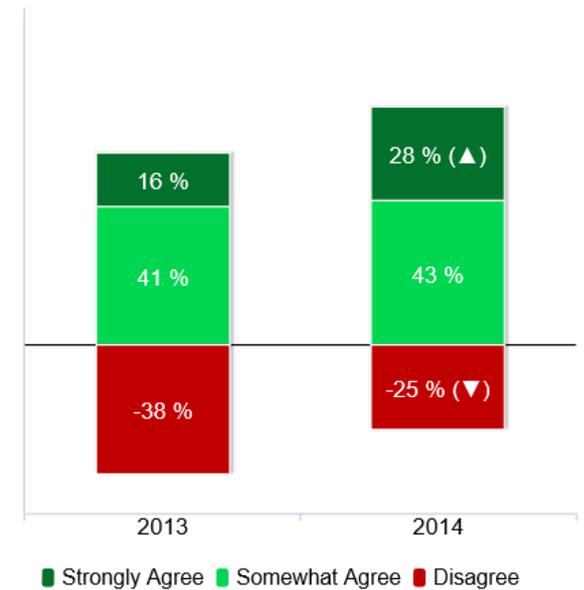
Impacts of September 2014 Service Change

The large majority of Riders were not impacted by the service change.

Nearly three out of four respondents indicated that they were not impacted by the service change (Current Riders: No Impact).

About 1 in 17 respondents said they stopped riding as a result of the service changes (Lost Riders).

■ Current Riders: No Impact ■ Current Riders: Impacted ■ Lost Riders

6 %

22 %

72 %
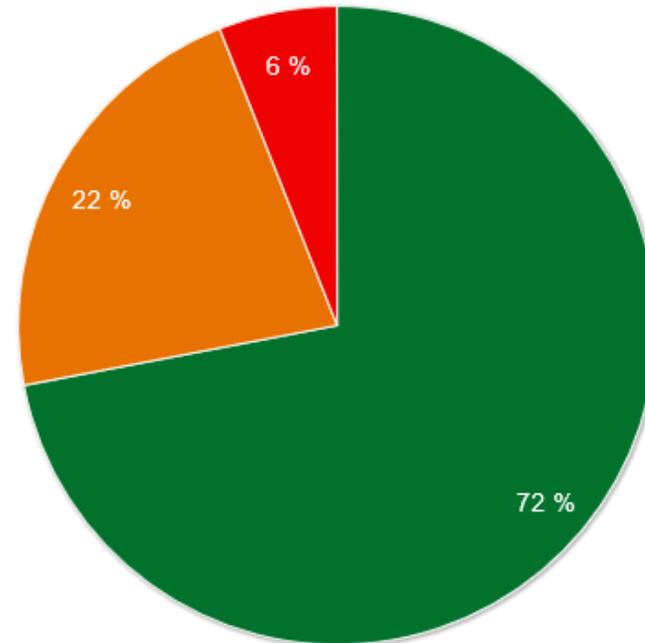
Impacts of September 2014 Service Change

The service change had a significant impact on Riders' overall satisfaction with Metro as well as their perceptions that Metro can deliver the level of service they expect.

The service change had a significant impact on Impacted Riders' overall satisfaction with Metro. Without the service change, it is possible the increase in overall satisfaction mentioned earlier could have been greater.	Current Riders impacted by the service change and Lost Riders also have significantly lower expectations that Metro can deliver quality service.

Left chart legend:
- Very Satisfied
- Somewhat Satisfied
- Total Dissatisfied

Left chart values:
- (a) Current Riders: No Impact — 52 % (b▲,c▲), 41 % (b▼,c▲)
- (b) Current Riders: Impacted — 28 % (a▼), 51 % (a▲,c▲), -19 % (a▲,c▼)
- (c) Lost Riders — 22 % (a▼), 23 % (a▼,b▼), -51 % (a▲,b▲)

Right chart legend:
- Have Low or Mixed Impressions and Expect Problems
- Expect High Quality and Generally Positive Can Deliver
- Expect High Quality and Confident Can Deliver

Right chart values:
- (a) Current Riders: No Impact — 49 % (b▲,c▲), 25 % (b▲), -26 % (b▼,c▼)
- (b) Current Riders: Impacted — 40 % (a▼), 15 % (a▼), -45 % (a▲)
- (c) Lost Riders — 30 % (a▼), 15 %, -55 % (a▲)

Impacts of September 2014 Service Change

Riders who were impacted by the service change were significantly less satisfied with the Level of Service provided. The impact was greatest on the percentage very satisfied with:

- Frequency of Service
- Travel Time

Riders impacted by the service change were also significantly less satisfied with Comfort Onboard. The impact was greatest on the percentage very satisfied with:

- Availability of Seating
- Ease of Loading and Unloading (due to crowding on the vehicles)

Legend: ■ No Impact ■ Impacted / Still Riding

	No Impact	Impacted / Still Riding
Distance Home to Stop	85 %	75 % (▼)
Travel Time	84 %	65 % (▼)
On-Time Performance	84 %	71 % (▼)
Frequency of Service	83 %	56 % (▼)
Availability of Service	79 %	61 % (▼)
Average Satisfied: Level of Service	83 %	64 % (▼)

Legend: ■ Current Riders: No Impact ■ Current Riders: Impacted

	Current Riders: No Impact	Current Riders: Impacted
Inside Cleanliness	92 %	85 % (▼)
Availability of Seating	84 %	56 % (▼)
Ease of Loading and Unloading	83 %	58 % (▼)
Overcrowding	62 %	42 % (▼)
Average: Satisfied Comfort / Cleanliness Onboard	80 %	60 % (▼)

% Satisfied (Very & Somewhat)

Impacts of September 2014 Service Change

The majority of those who stopped riding as a result of the service change say they would ride again if service is restored.

Despite the impact the service changes had on overall satisfaction and perceptions of Metro among Lost Riders, a large majority of Lost Riders suggest they would ride Metro again if service is restored.

Legend:
- Very Likely
- Somewhat Likely
- Neither Likely Nor Unlikely
- Not Very Likely
- Not At All Likely

Chart values:
- 53 % (Very Likely)
- 28 % (Somewhat Likely)
- 10 % (Neither Likely Nor Unlikely)
- 5 % (Not Very Likely)
- 4 % (Not At All Likely)
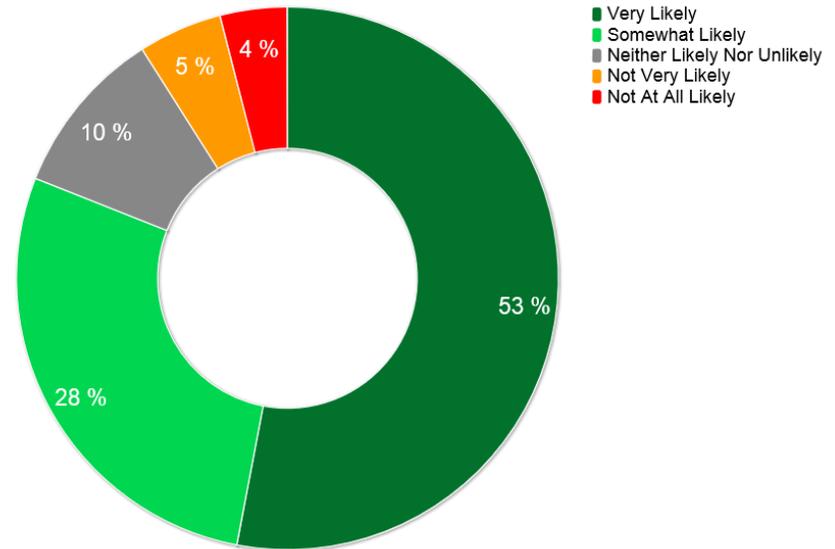
Key Drivers Analysis

While Metro made significant strides in increased satisfaction, analysis of the survey results identifies improvements that will positively influence Rider satisfaction and perceptions that Metro delivers service that meets their expectations.

Key Drivers Analysis identifies the extent to which the overall service dimensions and the individual service elements influence Riders' satisfaction with—and expectations of—Metro. Satisfaction ratings are used to identify priorities for improvements and services to maintain.

Level of Service (LOS) continues to be the most important determinant of Riders' satisfaction with and expectations of Metro.

- With the exception of Distance from Home to Stop, all elements of service within the LOS dimension receive below-average satisfaction ratings.

Personal Safety is the second most important service dimension.

- While satisfaction has improved, Safety after Dark is still a concern.

Comfort and Cleanliness At Stops and Onboard are also important priorities for improvement.

- Comfort and Cleanliness at Stops is more important than while onboard.
- All elements of service within the Comfort and Cleanliness at Stops dimension receive below-average ratings.

While Transferring is less important, both elements are important and ratings are low.

	Importance Rank	% Very Satisfied	Strategy
Level of Service	**1**	**41%**	**Improve**
Travel Time	**1**	**41%**	**Improve**
Availability	**2**	**40%**	**Improve**
Frequency	**3**	**36%**	**Improve**
On-Time	**4**	**41%**	**Improve**
Distance to Stop	5	53%	Maintain
Personal Safety	**2**	**50%**	**Monitor**
Onboard: Daytime	1	59%	Maintain
Stops: Dark	**2**	**28%**	**Improve**
Onboard: Dark	**3**	**37%**	**Improve**
Stops: Daytime	4	70%	Maintain
Downtown Transit Tunnel	5	51%	Monitor
Comfort and Cleanliness at Stops	**3**	**36%**	**Improve**
Loading/Unloading	1	45%	Improve
Lighting	3	33%	Improve
Shelters	2	35%	Improve
Cleanliness	4	41%	Improve
Seating	5	29%	Improve
Comfort and Cleanliness Onboard	**4**	**36%**	**Improve**
Cleanliness	1	47%	Improve
Crowding	2	21%	Improve
Loading/Unloading	3	36%	Improve
Availability of Seating	4	40%	Strategically Target
Information Sources	**5**	**66%**	**Maintain**
Overall Ability to Get Information	1	63%	Maintain
At Stops	2	43%	Improve
Availability of Information Online	3	71%%	Maintain
Metro Drivers	**6**	**65%**	**Maintain**
Effectively Handle Problems	1	55%	Monitor
Helpfulness with Information	2	66%	Maintain
Safe Vehicle Operation	3	74%	Maintain
Transferring	**7**	**30%**	**Improve**
Wait Time	1	27%	Improve
Number	2	35%	Improve

The summary table is ordered based on the importance of the Overall Service Dimension followed by the importance of the individual elements of service within that dimension.

STUDY BACKGROUND AND OBJECTIVES

King County's Department of Transportation—Transit Division (King County Metro) places high value on customer feedback and for more than 25 years has conducted an annual survey with King County residents who are transit Riders and Non-Riders. The primary objectives of this ongoing study are to:

- Provide a reliable measure of market share—that is, the percentage of households in King County with one or more riders

- Track customer awareness and perceptions of Metro services and programs

- Identify and track demographic, attitudinal, and transit use characteristics among riders and commuters

- Provide insights on current and relevant topics that are a current focus of Metro's service, marketing, and communications strategies

Riders are surveyed every year; Non-Riders are generally included every other (odd-numbered) year. This year's survey (2014) focuses primarily on Riders. In addition, the survey included some respondents who stopped riding due to the September service change.

METHODOLOGY

Sampling

The 2014 survey was based on a random telephone (landline and cell phone) sample of 5,348 King County residents aged 16 and older. A total of 1,201 of those contacted reported that they had ridden Metro in the 30 days prior to being surveyed and completed the entire survey.

Three primary rider segments were interviewed. The Lost Rider segment is new in 2014 and was included to provide insights into the impact of the September 2014 service changes.

Regular Riders
5 or More One-Way Rides in Past 30 Days
n = 861

Infrequent Riders
1–4 One-Way Rides in Past 30 Days
n = 241

Lost Riders
Rode Prior to 10/2014 and Stopped
Riding as a Result of Service Changes
n = 99

Regular Riders were further segmented based on their riding frequency.

Frequent Regular Riders
11+ One-Way Rides in Past 30 Days
n = 591

Moderate Regular Riders
5–10 One-Way Rides in Past 30 Days
n = 266

Four (4) Regular Riders did not provide an absolute number of one-way rides taken in the past 30 days. Therefore they are not included in the Frequent or Moderate Regular Rider classifications, and the sum of these two segments (n = 857) is less than total Regular Riders (n = 861).

To address the growing prevalence of cell-phone-only households and those who primarily use cell phones in King County, a dual-frame sample methodology was used. Nearly half (46%) of all King County households are cell-phone-only households.[1]

In 2014, nearly two out of five respondents were reached through the cell phone sample. More than half of all respondents reported that they either only or primarily use a cell phone.

Because cell phones are considered personal devices, the individual reached on the cell phone was surveyed. For the landline sample, if the household was identified as a Regular Rider household, an attempt was made to interview the Regular Rider. If the household was identified as an Infrequent Rider household, an attempt was made to interview the Infrequent Rider.

YEAR		2010	2011	2012	2013	2014
CELL PHONE SAMPLE	#	254	795	536	976	457
	%	22%	30%	44%	40%	38%
LANDLINE SAMPLE	#	886	1,762	682	1,438	744
	%	78%	79%	56%	60%	62%
TOTAL	#	1,140	2,521	1,218	2,414	1,201

[1] Source: Wireless Substitution: State-level Estimates from the National Health Interview Survey, 2012, Number 70, December 18, 2013.

To provide the ability to do reliable analysis across the region served by Metro, the sample was stratified using the boundaries of Metro's former planning areas. A minimum number of interviews with Regular Riders was set for each geographic area.

	COUNTYWIDE	SEATTLE/ NORTH	SOUTH KING	EAST KING
REGULAR RIDERS MINIMUM N	800	400	200	200
REGULAR RIDERS ACHIEVED	861	417	222	222
INFREQUENT RIDERS	241	123	52	67
LOST RIDERS	99	30	32	37
TOTAL	1,201	570	305	326

Finally, to ensure representation of King County's diverse population, supplemental sampling was undertaken to ensure representation of low-income households and Hispanic and Asian riders roughly in proportion to their incidence in the general population.

TARGET DEMO	% IN POPULATION	NUMBER ACHIEVED	% OF SAMPLE
LOW-INCOME HOUSEHOLDS (<$35,000)	24%	268	24%
HISPANICS	7%	71	6%
ASIAN	13%	137	11%

Data were weighted based on this complex sampling plan. Full documentation of the weighting procedures is provided to Metro separately.

Using a 95 percent confidence level, the margin of error of the entire sample is no greater than plus or minus 2.8 percentage points. This means that if the study were duplicated in the same time frame with a different 1,200 respondents, sampled in the same fashion, 95 times out of 100, the same result would occur, within the stated range. The adjacent table provides the margin of error for key subgroups in the study.

	N	MARGIN OF ERROR 95% CONFIDENCE LEVEL
TOTAL CONTACTS*	5,348	±1.3%
TOTAL	1,201	±2.8%
SEATTLE / NORTH KING COUNTY	570	±4.1%
SOUTH / EAST KING COUNTY	305–326	±5.5%
REGULAR RIDERS	861	±3.3%
INFREQUENT RIDERS	241	±6.3%
LOST RIDERS	99	±9.8%

* The all contacts data file is used to compute market share and includes all Riders and Non-Riders contacted.

Response Rates

Strict dialing protocols (minimum of six attempts to all working phone numbers before being abandoned), highly trained interviewers, and refusal conversion attempts have been used to maintain high response rates over the years. Response rates in 2014 were the highest achieved in the past four years.

All work for this project was carried out in compliance with ISO 20252: 2012 Market Research Standards for quality.

	2011	2012	2013	2014
CONTACT RATE	77.9%	40.5%	48%	56.4%
COOPERATION RATE	31.5%	46.9%	62.5%	70.2%
RESPONSE RATE	22.7%	28.2%	28.5%	37.0%

Contact rate is the proportion of all cases in which some responsible member of the housing unit was reached for the survey.
Cooperation rate is the proportion of all cases interviewed of all eligible units contacted.
Response rates are the number of completed interviews with reporting units divided by the number of eligible reporting units in the sample.

Survey Instrument

The questionnaire included many of the same questions as in previous years as well as new questions to address special topics. The topics covered in the survey for each Rider segment are shown in the adjacent table.

The interviews averaged 23 minutes. The survey was significantly longer for Regular and Infrequent Riders (25 and 22 minutes, respectively) than for Lost Riders (13 minutes).

All Contacts		
• Household Ridership	• Individual Ridership	• Impact of Service Change

Current Riders		
• Frequency	• Trip Purpose(s)	• Length of Time Riding
• Transit Dependence	• Transferring	• Travel Behavior
• Personal Travel	• Fare Payment	• Personal Safety
• Information Sources	• Commute Status and Behavior	
• Management of Service Change	• Satisfaction with Service Elements	

Current and Lost Riders		
• Overall Satisfaction	• Perceptions of Metro	• Demographics

The survey instrument was pretested over several days. The initial pretest focused on questionnaire wording and respondent understanding. Subsequent pretesting was used to test study assumptions including survey length and incidence. Data collection began on November 8, 2014, and continued through December 14, 2014. No interviewing was done the day before or after the Thanksgiving holiday (November 27).

Data collection was originally scheduled to start on 10/27/2014 but was delayed to begin after the election held on 11/04/2014. It was felt that inclusion of Proposition 1 (a transit-related measure) on the Seattle ballot could adversely impact response rates and introduce bias.

Bernett Research was used for telephone data collection; they also did the data collection for the 2013 Rider / Non-Rider Survey. A minimum of 10 percent of all interviews were monitored; NWRG project staff monitored (either live or through recordings) a minimum of 5 percent of the interviews.

Interviews were conducted in English and Spanish. The survey was translated into Spanish and administered by multilingual interviewers. Seventy-one (71) respondents self-identified as Hispanic; a total of 22 interviews (31%) chose to complete the survey in Spanish. This is significantly higher than 2013 when only 22 out of a total of 120 Hispanics (18%) completed the survey in Spanish.

Analysis and Reporting

This report summarizes the major findings of the research for each survey topic overall and by key subgroups such as Rider status (based on frequency of riding), area of residence, and commuter status. Tables and charts provide supporting data. In the charts and tables, unless otherwise noted, column percentages are used. Percentages are rounded to the nearest whole number. Columns generally sum to 100 percent except in cases of rounding. In some instances, columns sum to more than 100 percent due to multiple responses given to a single question; these cases are noted.

All satisfaction and attitudinal questions use a five-point scale. The Top Box scoring method only accounts for the percentage of respondents selecting the highest rating (a 5). Top Two Box analysis combines the percentage of respondents selecting the top two score (4 or 5). In some instances the sum of the top two scores is greater or less than the individual scores. This is due to rounding as percentages are rounded to the nearest whole number.

On many questions in the survey, respondents may have answered "don't know." In addition, respondents have the option to refuse to answer any questions. In general, "don't know" and "refused" responses are counted as missing values and are not included in the reported percentages except as noted.

For every major topic, the specific question number or code and the actual text asked of the respondent is provided. The full questionnaire is included in the Appendix. The base for the question—that is, the characteristics and number of respondents asked the question—is also provided. The base for a question may vary depending on answers to previous questions or inclusion in specific analytical groups—for example, Regular Riders versus Infrequent Riders. Unless otherwise noted, the results in this report are based on the final weighted sample data although actual (unweighted) cell sizes are used to determine statistically significant differences and reliability.

This report also identifies differences that are statistically significant. If a particular difference is large enough to be unlikely to have occurred due to chance or sampling error, the difference is statistically significant. Unless noted otherwise, statistical significance was tested at the 95 percent confidence levels. Significant differences are pointed out in the report text and identified in tables and charts as follows.

When comparing changes over time, comparisons are made to the prior year. In the table below, the notation ▼ in 2011 indicates that the extent to which riders' primary trip does not require a transfer decreased significantly from 2010. Similarly, the notation ▲ in 2014 indicates that the extent to which riders' primary trip does not require a transfer increased significantly from 2013.

	2010	2011	2012	2013	2014
No Transfers	60%	49% (▼)	50%	48%	61% (▲)

Significant increase (▲) or (▼) from previous year

When comparing the differences in responses between different respondent groups, significant differences are noted by showing whether responses are significantly higher (▲) or lower (▼) than the columns identified by letter. In the table below the notation (b▲) under (a) Seattle / North King County indicates that the extent to which Seattle / North King County Riders' primary trip does not require a transfer is significantly higher than (b) South King County.

	(a) Seattle / North King	(b) South King	(c) East King
No Transfers	66.6% (b▲)	51.5% (a▼,c▼)	62.3% (b▲)

Significant difference (▲) or (▼) between respondent groups

A statistically significant difference may not always be practically significant. The differences of practical significance depend on the judgment of the organization's management.

FINDINGS—MARKET SHARE

Summary

This annual survey provides a reliable measure of market share—defined as the percentage of King County households with one or more Regular Rider (individuals taking at least five one-way rides monthly). This is done by asking all households contacted: (1) the number of individuals in their household 16 years of age and older, (2) the number of household members taking at least one one-way ride on a Metro bus or the South Lake Union Streetcar in the previous 30 days, and (3) the number taking five or more one-way rides in the previous 30 days.

Topic	What We Found				What It Means
Household Market Share	Countywide, the share of Regular Rider households has remained stable for the past three years. • The share of households with Infrequent Riders (no Regular Riders) has fluctuated over the years.	**2012**	**2013**	**2014**	Metro's ridership growth in recent years has come from population growth—that is, growth in the number of households in King County—attracting Riders from within these new households while retaining Riders from within existing households.
		REGULAR Rider Households			
		33%	34%	35%	
		INFREQUENT Rider Households			
		7%	11%▲	9%▼	
		NON-Rider Households			
		60%	55%▼	56%	
		Significant increase (▲) or (▼) from previous year			
Seattle / N. King County	Geographically Seattle / North King County is relatively small but is the most densely populated area of the county (39% of all households). After decreasing significantly between 2012 and 2013, the share of Regular Rider households increased somewhat in 2014. This increase, however, is not statistically significant and should be monitored in further years.	**2012**	**2013**	**2014**	Seattle / North King County continues to represent King County's core market. It is the most densely populated geographic area (39% of all households), and extensive, relatively high-frequency service has translated into very high market share.
		REGULAR Rider Households			
		53%	47%▼	49%	
		INFREQUENT Rider Households			
		11%	14%▲	13%	
		NON-Rider Households			
		36%	39%	38%	
		Significant increase (▲) or (▼) from previous year			

Topic	What We Found		What It Means
South King County	Geographically larger than Seattle / North King County, South King County represents approximately one-third (35%) of all King County households. The share of Regular and Infrequent Rider households in South King County increased significantly in 2013. Both figures decreased in 2014, with the percentage of Infrequent Rider households decreasing significantly.	**2012** **2013** **2014** **REGULAR Rider Households** 19% 28%▲ 26% **INFREQUENT Rider Households** 4% 7%▲ 5%▼ **NON-Rider Households** 77% 65%▼ 69%▲ *Significant increase (▲) or (▼) from previous year*	The significant increase in household market share in this region between 2012 and 2013 may have reflected the growth in transit-oriented developments and increased access to more direct, higher frequency service. Current figures suggest that growth has stabilized and that additional service may be necessary to further increase ridership in this area.
East King County	East King County is also geographically larger than Seattle / North King County yet represents only 27% of all King County households. The share of households with Regular Riders has nearly doubled since 2010—from 15% to 27%.	**2012** **2013** **2014** **REGULAR Rider Households** 22% 23% 27%▲ **INFREQUENT Rider Households** 6% 11% 8%▼ **NON-Rider Households** 72% 66%▼ 65% *Significant increase (▲) or (▼) from previous year*	The most recent increase in the share of Regular Rider households is largely due to the decrease in Infrequent Rider households, suggesting that less frequent Riders in East King County are taking more trips, shifting them from Infrequent to Moderate Regular Riders.
Share of Population	Using the average number of individual Riders reported, it is possible to provide an estimate of the percent of the population 16 years of age and older who ride Metro. One out of four King County residents who are 16 years of age or older are Regular Riders, and an additional 14 percent are Infrequent Riders.	**% of Population 16+ Who Are . . .** **ALL Riders** **REGULAR Riders** **INFREQUENT Riders** **All King County** 38% 24% 14% **Seattle / North King County** 55% 35% 19% **South King County** 27% 17% 105 **East King County** 30% 17% 13%	King County Metro provides a necessary service for a significant percentage of the population, notably in the geographically constrained and densely populated communities surrounding downtown Seattle. Even in the more suburban areas of the county, a large percentage of the population has direct experience with the system on a regular or semi-regular basis.

Market Share (Households with Riders)

Metro has traditionally examined three components of market share: (1) the percent of households with a Regular Rider (could also include Infrequent Riders); (2) the percent of Infrequent Rider households (no Regular Riders); and (3) Non-Rider households. Market share is computed based on all households contacted who provided data on the extent to which the respondent on the phone or others in the household use Metro.

- The share of households with Regular Riders increased slightly in 2014 while the share of households with Infrequent Riders decreased. The overall share of Rider households between 2013 (45%) and 2014 (44%) is unchanged.

Figure 1: Market Share: Countywide
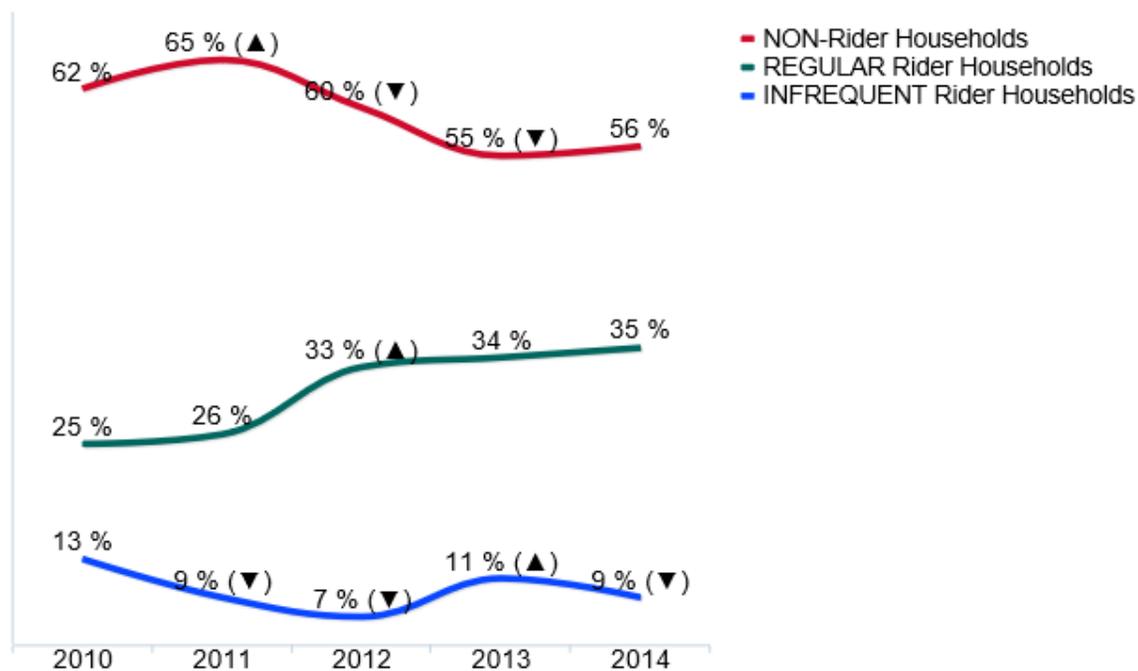
Questions: S4A—Including yourself, how many people in your household, age 16 or over, have taken between one (1) and four (4) one-way rides on a Metro bus or the South Lake Union Streetcar in the last 30 days?
S4B—Including yourself, how many people in your household, age 16 or over, have taken at least five (5) one-way rides in the last 30 days?

Base: All contacted households
▲ / ▼ indicates a statistically significant change from previous year

Differences by Geographic Area

While no longer used for planning purposes, Metro has traditionally stratified the county by three major geographic areas.

Seattle / North King County continues to represent Metro's core market. • It is the most densely populated area—nearly two out of five (39%) King County households are located within this relatively small geographic area. • More than three out of five households in this area ride Metro.	*Figure 2: Market Share: Seattle / North King County*
Geographically larger, South King County represents nearly the same number of households as Seattle / North King County. • More than one out of three (35%) King County households are within this geographic area. • Three out of ten households in this area ride Metro. o The percentage of Regular Rider households increased significantly in 2013. While that percentage decreased in 2014, it remains significantly higher than in years prior to 2012. • South King County has the lowest percentage of households with Infrequent Riders.	*Figure 3: Market Share: South King County*

East King County is also geographically large but represents the smallest number of households.

- Twenty-seven percent (27%) of all King County households are located within this geographic area.

- The share of Regular Rider households has increased steadily in this area over the past five years. More than one out of three households in this area ride Metro.

Figure 4: Market Share: East King County
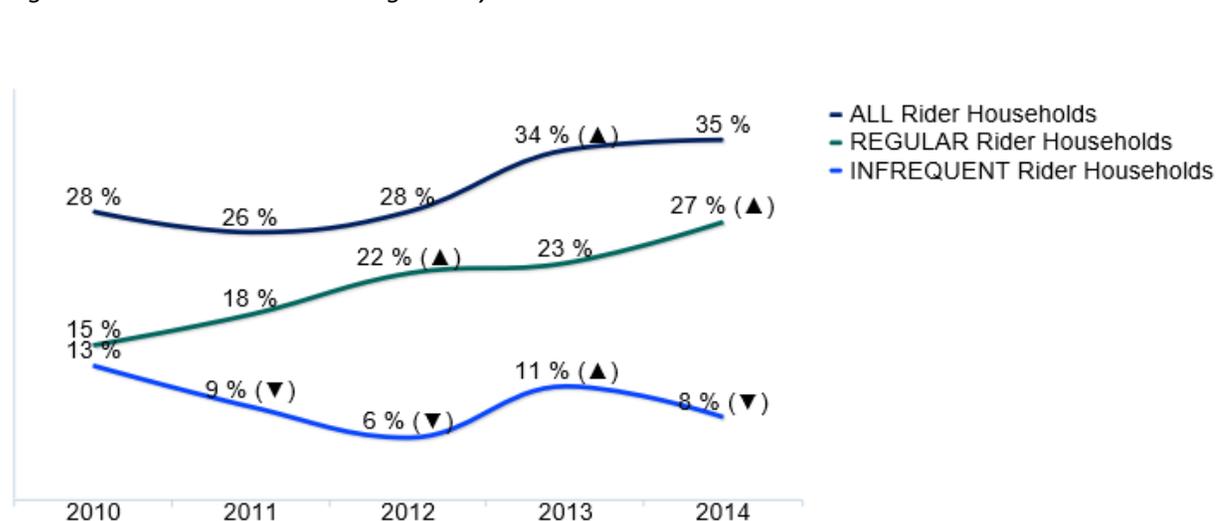
King County covers more than 2,300 square miles and is home to more than 830,000 households and a population of more than 1.75 million people 16 years of age and older.

- With these figures, it is estimated that there are currently 366,264 households with one or more Riders in the household—291,882 households have one or more Regular Riders.

The adjacent table provides estimates of the actual number of rider and non-rider households in King County and within each geographic area.

Table 1: Number of Rider Households

	COUNTYWIDE	SEATTLE / N. KING COUNTY	SOUTH KING COUNTY	EAST KING COUNTY
TOTAL NUMBER OF HOUSEHOLDS*	831,466	321,508	287,375	222,583
TOTAL RIDER HOUSEHOLDS	366,264	199,978	87,937	78,349
REGULAR Rider	291,882	158,504	73,281	60,098
INFREQUENT Rider	74,383	41,475	14,656	18,252
NON-Rider HOUSEHOLDS	465,202	121,530	199,438	144,234

* ESTIMATED NUMBER OF HOUSEHOLDS PROVIDED BY KING COUNTY OFFICE OF PERFORMANCE, STRATEGY, AND BUDGET

Share of Population

All respondents contacted for the survey (Riders and Non-Riders) were asked to provide:

- Total number of persons in the household 16 years of age and older
- Total number of persons in the household 16 years of age and older who had taken five or more one-way rides on Metro in the previous 30 days
- Total number of persons in the household 16 years of age and older who had taken one to four one-way rides on Metro in the previous 30 days

Using these figures it is possible to estimate the percentage of the population, 16 years of age or older, who ride Metro.

Nearly two out of five people (38%) 16 years of age and older ride Metro. This is slightly lower than share of households with riders, indicating that in some multi-person households some members ride while others do not.

- Seattle / North King County represents 36 percent of the region's population; more than half (55%) of that population use Metro.
- While geographically larger, South King County represents 37 percent of the region's population; just over one out of four (27%) use Metro.
- Also geographically large, East King County is the least densely populated, representing 27 percent of the region's population. Three out of ten (30%) are Metro riders.

Table 2: Share of Population (16+)

	% OF	ALL Riders	REGULAR Riders	INFREQUENT Riders	NON-Riders
COUNTYWIDE	Households	44%	35%	9%	56%
	Population	38%	246%	14%	62%
SEATTLE / N. KING COUNTY	Households	62%	49%	13%	38%
	Population	55%	35%	19%	45.%
SOUTH KING COUNTY	Households	31%	26%	5%	69%
	Population	27%	17%	10%	73%
EAST KING COUNTY	Households	35%	27%	8%	65%
	Population	30%	17%	13%	70%

FINDINGS: RIDER DEMOGRAPHICS

Summary

Topic	What We Found	What It Means
All Current Riders	Riders surveyed in 2014 are more likely to be women than men—the reverse of the general population. In addition, Riders surveyed in 2014 are older than the general population. Notably, more than four out of ten riders surveyed in 2014 are 55 and older, compared to just three out of ten individual in the general population. The increase in the percentage of older riders surveyed occurred within the 55+ age group, with a corresponding decreased in the percentage between the ages of 18 and 44. Riders are somewhat less affluent than the general population. More than four out of five Riders have a driver's license and/or access to a vehicle	(see table below)	While response rates to the survey were high, there is a significant increase in the percentage of older riders reached. A greater number of older riders were reached through the cell phone sample which in the past reached a high number of younger residents. In addition, a greater percentage of Infrequent Riders were surveyed. Infrequent Riders are older. Future research can be used to determine if this (aging Riders) is a trend. With most Riders have access to a vehicle, it is clear that they have a choice in whether or not to use transit. Other factors such as access to service, congestion, parking costs, and social consciousness are likely motivators for transit use among these Riders.

	King County Population*	Current Metro Riders
Male	52%	47%
Female	48%	53%
16–17	3%	3%
18–34	29%	23%
35–54	37%	33%
55+	31%	41%
Mean	44.8	48.3
Employed	64%	65%
Not Employed	36%	35%
<$35,000	24%	26%
$35K–<$75K	28%	30%
$75K–<$100K	13%	12%
$100K +	35%	31%
Median	$70,998	$66,448
% with License	n.a.	83%
% with Vehicle in Household	91%	88%

* Source: 2013 American Community Survey three-year estimates

Topic	What We Found	What It Means
Regular and Infrequent Riders	Three out of five (59%) Riders are Regular Riders—that is, they take five or more one-way rides monthly. • Seattle / North King County and, to a lesser extent, South King riders are the most likely to be Regular Riders (62% and 60%, respectively). • East King County has the highest percentage of Infrequent Riders (45%). Infrequent Riders are significantly older than Regular Riders—more than half are 55 or older, and nearly one-quarter are retired. Regular Riders are more likely than Infrequent Riders to be employed or students. However, they are less affluent than Infrequent Riders. Regular Riders are more diverse than Infrequent Riders and are similar to the general population.	*(see table below)*	Regular and Infrequent Riders are two distinct segments demographically and, as shown in the next section, have very different travel behaviors. While Regular Riders represent Metro's core market, the importance of Infrequent Riders should not be underestimated.

	REGULAR Riders	INFREQUENT Riders
Male	48%	44%
Female	52%	56%
16–17	3%	2%
18–34	28%▲	15%▼
35–54	34%	30%
55+	35%▼	52%▲
Mean	45.4▼	53.0▲
Employed	68%▲	60%▼
Student	14%▲	6%▼
Not Employed	28%▼	40%▲
<$35,000	28%	24%
$35K–<$75K	31%	29%
$75K–<$100K	12%	14%
$100K +	30%	34%
Median	$63,775▼	$71,297▲
% Caucasian	71%▼	83%▲
% Asian	14%▲	6%▼
% Black	5%▲	3%▼
% Hispanic	7%	5%
% with License	77%▼	93%▲
% with Vehicle in Household	85%▼	93%▲

▲ / ▼ *indicates a statistically significant difference between respondent groups*

Topic	What We Found		What It Means
Regular Riders	Seven out of ten (69%) Regular Riders are Frequent Regular Riders—that is, they take 11 or more one-way rides monthly. • South King County has the highest percentage of Frequent Regular Riders—nearly three out of four (74%) are Frequent Regular Riders. With the exception of age and employment status, there are few demographic differences between Frequent and Moderate Regular Riders. Frequent Regular Riders are: • Significantly younger (average age 44) than Moderate Regular Riders. • More likely to be employed. Moderate Regular Riders are • Significantly older (average age 48) than Frequent Regular Riders but younger than Infrequent Riders (average age 53). • Less likely to be employed; one-fourth (24%) are retired.	<table><tr><th></th><th>Frequent Regular Riders</th><th>Moderate Regular Riders</th></tr><tr><td>16–17</td><td>3%</td><td>4%</td></tr><tr><td>18–34</td><td>29%</td><td>24%</td></tr><tr><td>35–54</td><td>36%</td><td>30%</td></tr><tr><td>55+</td><td>31%▼</td><td>42%▲</td></tr><tr><td>Mean</td><td>44.1▼</td><td>48.3▲</td></tr><tr><td>Employed</td><td>74%▲</td><td>55%▼</td></tr><tr><td>Student</td><td>15%</td><td>11%</td></tr><tr><td>Not Employed</td><td>22%▼</td><td>45%▲</td></tr></table>▲ / ▼ *indicates a statistically significant difference between respondent groups*	The differences in age between the three rider segments (Frequent Regular, Moderate Regular, and Infrequent Riders) and corresponding employment status suggest opportunities for generational segmentation and marketing communications.

Topic	What We Found		What It Means
Low-Income Riders	One out of four (24%) Riders have a household income that is below $35,000—that is, are Low-Income Riders. • One out of three (34%) South King County Riders are Low-Income Riders. Low-Income Riders cross all age groups. • However, a relatively higher percentage are between the ages of 18 and 34 and, to a lesser extent, 55 and older. Only two out of five Low-Income Riders are employed. • Nearly one out of five are students. Nearly three out of five Low-Income are unemployed. • 20% are retired • 16% are not currently employed • 17 % are disabled Low-Income Riders are diverse. Only three out of five Low-Income Riders have a driver's license and/or access to a vehicle.	(see table below)	King County Metro provides an important social service for those who have limited options for travel. This is a diverse segment and is likely to have varying travel needs.

	≤$35K	**>$35K**
Male	42%	48%
Female	58%	52%
16–17	2%	3%
18–34	29%▲	21%▼
35–54	25%▼	36%▲
55+	45%	40%
Mean	48.1	48.5
Employed	40%▼	74%▲
Student	17%▲	9%▼
Not Employed	58%▲	23%▼
Median	$17,986	$121,094
% Caucasian	65%▼	81%▲
% Asian	9%	11%
% Black	9%▲	3%▼
% Hispanic	13%▲	4%▼
% with License	61%▼	92%▲
% with Vehicle in Household	61%▼	97%▲

▲ / ▼ *indicates a statistically significant difference between respondent groups*

Current Riders

Riders have been traditionally segmented into two groups—Regular and Infrequent Riders.

- Three out of five respondents surveyed were Regular Riders—making five or more one-way trips in the 30 days prior to being surveyed.

  - East King County has the smallest proportion of Regular Riders.

Figure 5: Distribution of Regular and Infrequent Riders
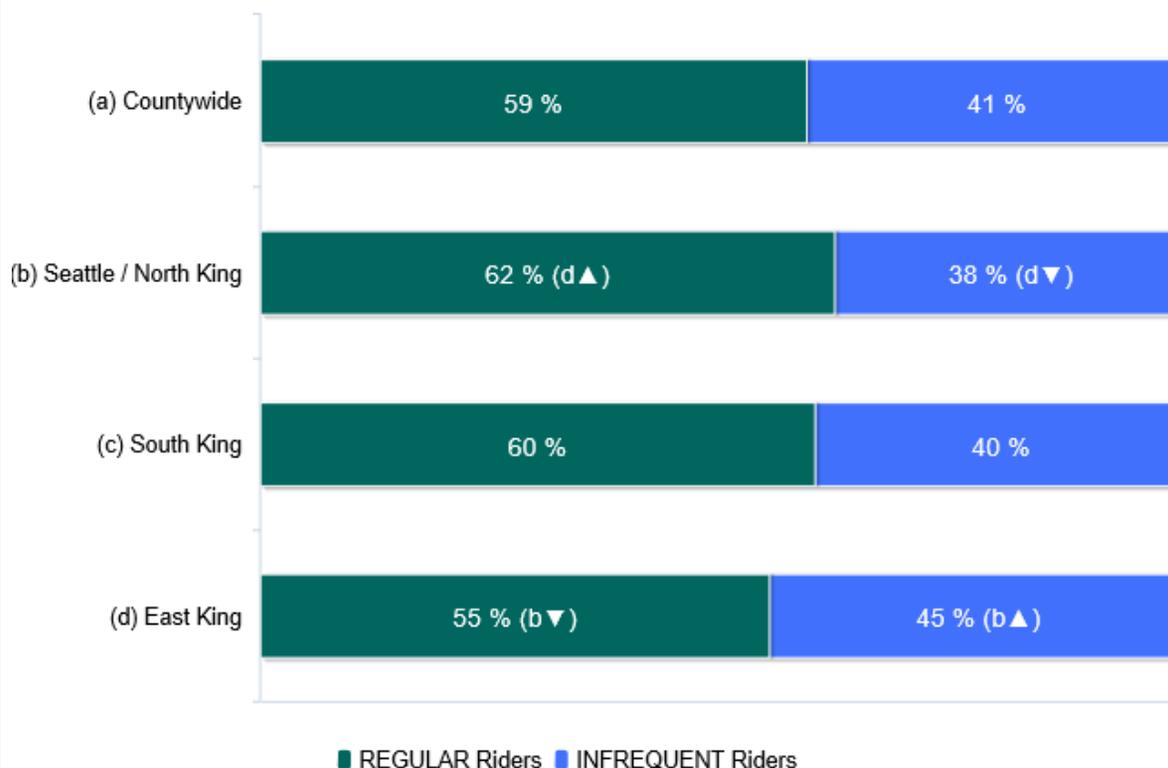
Questions: *S5A*   *Thinking about the last 30 days, how many one way rides have you taken on a Metro bus?*
         S S6A   *Thinking about the last 30 days, how many one way rides have you taken on the South Lake Union Street Car?*
Base: Current Regular and Infrequent Riders; Year: 2014

	ALL Riders	REGULAR Riders	INFREQUENT Riders
n	1,102	861	241
n_w	1,161	719	442

▲ / ▼ indicates a statistically significant difference between respondent groups

All Riders

Riders surveyed in 2014 are:

- More likely to be women than men. This holds true for both Regular and Infrequent Riders.
- Significantly older than in previous years—the average age in 2014 is 48.3 years compared to 41.7 in 2013.
- The majority of Riders have a driver's license and access to a vehicle.

Regular Riders

- Regular Riders are younger than Infrequent Riders. Three out of ten Regular Riders are under the age of 35.
- Two out of three Regular Riders are employed; 14% are students.
- Regular Riders are somewhat less affluent than Infrequent Riders.
  - The median household income for Regular Rider households is just over $65,000—approximately $6,000 less than the general population in King County.
- Regular Riders are more diverse than Infrequent Riders.
- While most Regular Riders have a license and access to a vehicle, they are less likely to do so than Infrequent Riders.

Infrequent Riders

- Infrequent Riders are significantly older than Regular Riders. More than half are 55 years of age and older.
  - Consistent with their age, nearly one out of four Infrequent Riders are retired.
  - Three out of ten Infrequent Riders do not live with other individuals 16 years of age and older.
- The median household income for Infrequent Riders is somewhat higher than King County's general population ($70,998).

Table 3: Demographics: Regular and Infrequent Riders

	ALL Riders (n=1,102; n_w=1,161)	REGULAR Riders (n=861; n_w=719)	INFREQUENT Riders (n=241; n_w=442)
GENDER			
MALE	47%	48%	44%
FEMALE	53%	52%	56%
AGE			
16–17	3%	3%	2%
18–34	23%	28%▲	15%▼
35–54	33%	34%	30%
55+	41%	35%▼	52%▲
MEAN	48.3	45.4▼	53.0▲
EMPLOYMENT STATUS*			
EMPLOYED	65%	68%▲	60%▼
STUDENT	11%	14%▲	6%▼
RETIRED	17%	13%▼	23%▲
OTHER	16%	15%	17%
INCOME			
<$35K	26%	28%	24%
$35K –$55K	14%	15%	13%
$55K –$75K	16%	16%	16%
$75K –$100K	12%	12%	14%
$100K+	31%	30%	34%
MEDIAN	$67,988	$65,396▼	$72,142▲
HH COMP (16 YRS OF AGE+)			
SINGLE-PERSON	24%	20%▼	30%▲
MULTIPERSON	76%	80%▲	70%▼
RACE/ETHNICITY*			
HISPANIC	6%	7%	5%
CAUCASIAN	76%	71%▼	83%▲
ASIAN	11%	14%▲	6%▼
BLACK	4%	5%▲	3%▼
OTHER	4%	6%	4%
VEHICLE ACCESS			
% W/ LICENSE	83%	77%▼	93%▲
% W/ VEHICLES	88%	85%▼	93%▲
MEAN # VEHICLES	1.73	1.69	1.81

Base: Regular and Infrequent Riders; Year: 2014
▲ / ▼ indicates a statistically significant difference between respondent groups
* Columns sum to more than 100%; multiple responses allowed

As noted, Riders surveyed in 2013 are on average older than those surveyed in 2014.

- This is due to a lower percentage of Riders between the ages of 18 and 44 and a higher percentage of Riders 55 and older.

Table 4: Demographics: Differences in Age Distributions 2013–2014

	2013	2014
16–17	3%	3%
18–24	13%▲	9%▼
25–34	20%▲	14%▼
35–44	19%▲	14%▼
45–54	18%	19%
55–64	16%▼	22%▲
65+	13%▼	19%▲
MEAN	41.7	48.3

▲ / ▼ indicates a statistically significant difference between respondent groups

Regular Riders

There are some significant differences in the demographic characteristics of Regular Riders living in different areas of the county.

Seattle / North King County Regular Riders

- Regular Riders living in Seattle / North King County are significantly older than Regular Riders in other areas.
  - One out of five are 65 and older.
- Regular Riders living in North King County are more likely to live alone in a household with no other persons 16+.
- Seattle / North King County Regular Riders have fewer vehicles per household.
  - This is due in part to the higher percentage of single-person households, but it holds true in multi-person households.

South King County Regular Riders

As in previous years, South King County Regular Riders are distinct from those living in other areas.

- South King County Regular Riders are diverse.
  - Significant percentages are Hispanic and/or black.
- South King County Regular Riders are less affluent than other riders.
  - More than one-third have household incomes below $35,000.
- South King County Regular Riders are less likely to have a driver's license and access to a vehicle.
- Nearly one out of ten South King County Regular Riders report that they are disabled.

East King County Regular Riders

- East King County Regular Riders are affluent.
- A significant percentage (more than one out of five) are Asian.
- Most have a driver's license and access to multiple vehicles.

Table 5: Demographics: Regular Riders by Area of Residence

	SEATTLE/NORTH (n=417; n$_w$=289)	SOUTH KING (n=222; n$_w$=226)	EAST KING (n=222; n$_w$=203)
GENDER			
MALE	46%	48%	52%
FEMALE	54%	52%	48%
AGE			
16–34	26%▼	36%▲	33%
35–54	32%	35%	39%
55+	42%▲▲	31%▼	29%▼
MEAN	48.9▲	43.4▼	44.8▼
EMPLOYMENT STATUS*			
EMPLOYED	67%	66%	70%
STUDENT	12%	14%	16%
RETIRED	16%	10%	10%
DISABLED	3%▼	9%▲▲	2%▼
OTHER	11%	11%	10%
INCOME			
<$35K	28%▼▲	38%▲▲	14%▼▼
$35K–$55K	15%	18%	12%
$55K–$75K	16%	17%	14%
$75K–$100K	13%	8%▼	14%▲
$100K+	28.5%▲▼	19%▼▼	46%▲▲
MEDIAN	$65,000	$50,000	$93,750
HH COMP (16 YRS OF AGE+)			
SINGLE-PERSON	27%▲	21%▲	9%▼▼
MULTIPERSON	73%▼	79%▼	91%▲▲
RACE/ETHNICITY*			
HISPANIC	5% ▼	11%▲	5%▼
CAUCASIAN	77% ▲	64% ▼	72%
ASIAN	8% ▼▼	14%▲	21%▲
BLACK	4%▼	10%▲▲	3%▼
OTHER	4%	7%▲	4%▼
VEHICLE ACCESS			
% W/ LICENSE	78%▲	68%▼	87%▲
% W/ VEHICLES	80%▼	85%▼	94%▲
MEAN # VEHICLES (ALL)	1.37	1.73	2.08

Base: Regular Riders; Year: 2014; ▲ / ▼ Indicates a statistically significant difference between respondent groups; * Columns sum to more than 100%; multiple responses allowed

Regular Riders are segmented into two groups based on the frequency with which they ride.

- Two out of three Regular Riders surveyed were Frequent Regular Riders—taking 11 or more one-way rides in the 30 days prior to the survey.

    o Nearly three out of four Regular Riders in South King County are Frequent Regular Riders.

Figure 6: Distribution of Frequent and Moderate Regular Riders
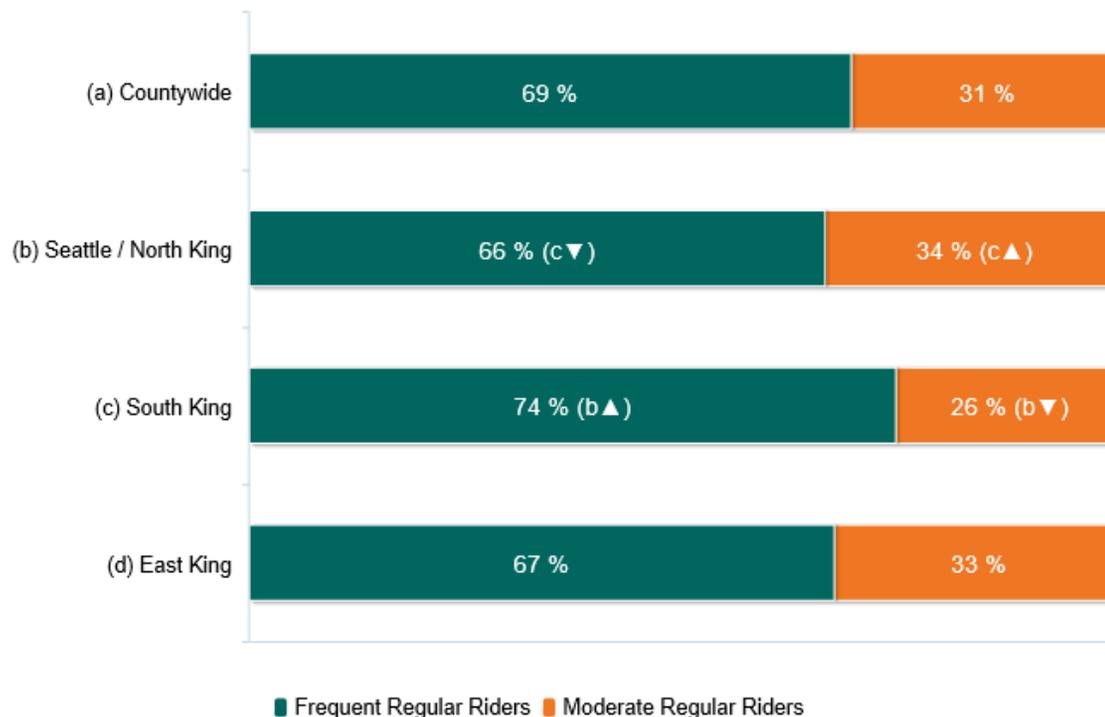
Questions: S5A Thinking about the last 30 days, how many one way rides have you taken on a Metro bus?

S S6A Thinking about the last 30 days, how many one way rides have you taken on the South Lake Union Street Car?

Base: Regular Riders; Year: 2014

	Countywide	Seattle / North King	South King	East King
n	1,102	540	273	289
n_w	1,161	449	359	353

▲ / ▼ indicates a statistically significant difference between respondent groups

Except for age and employment status, there are few demographic differences between Frequent and Moderate Regular Riders.

Frequent Regular Riders

- Frequent Regular Riders are more likely than Moderate Regular riders to be employed.
  - Nearly three out of four Frequent Regular Riders are employed.

Moderate Regular Riders

Moderate Regular Riders are more similar to Infrequent Riders than Frequent Regular Riders in terms of their age and employment status

- Like Infrequent Riders, Moderate Regular Riders are older than Frequent Regular Riders. A large percentage of this segment are retired or homemakers.

  - However, Moderate Regular Riders are younger than Infrequent Riders—only 42% of Moderate Regular Riders are 55 or older compared to 52% of Infrequent Riders.

Table 6: Demographics: Frequent and Moderate Regular Riders

	Frequent Regular Riders (n = 591; n_w = 498)	Moderate Regular Riders (n = 266; n_w = 197)
GENDER		
MALE	49%	46%
FEMALE	51%	54%
AGE		
16–17	3%	4%
18–34	29%	24%
35–54	36%	30%
55+	31%▼	42%▲
MEAN	44.1▼	48.3▲
EMPLOYMENT STATUS*		
EMPLOYED	74%▲	55%▼
STUDENT	15%	11%
RETIRED	8%▼	24%▲
OTHER	13%▼	21%▲
INCOME		
<$35K	27%	28%
$35K –$55K	14%	16%
$55K–$75K	17%	12%
$75K–$100K	12%	12%
$100K+	29%	32%
MEDIAN	$65,260	$66,250
HH COMP (16+ YRS OF AGE)		
SINGLE-PERSON	20%	19%
MULTIPERSON	80%	81%
RACE/ETHNICITY*		
HISPANIC	7%	7%
CAUCASIAN	70%	74%
ASIAN	16%	10%
BLACK	6%	4%
OTHER	5%	5%
VEHICLE ACCESS		
% W/ LICENSE	76%	82%
% W/ VEHICLES	84%	89%
MEAN # VEHICLES	1.68	1.72

Base: Regular Riders; Year: 2014
▲ / ▼ Indicates a statistically significant difference between respondent groups
* Columns sum to more than 100%; multiple responses allowed

Low-Income Riders

Low-Income Riders are defined as those with household incomes below $35,000.

- Nearly one out of four Riders are Low-Income Riders.

  - One out of three Riders living in South King County are Low-Income Riders. On the other hand, only 12 percent of Riders living in East King County are Low-Income Riders.

Figure 7: Distribution of Low-Income Riders

	Below $35,000 Per Year	Above $35,000 Per Year
(a) Countywide	24 % (c▼,d▲)	76 % (c▲,d▼)
(b) Seattle / North King	25 % (c▼,d▲)	75 % (c▲,d▼)
(c) South King	34 % (a▲,b▲,d▲)	66 % (a▼,b▼,d▼)
(d) East King		88 % (a▲,b▲,c▲)

■ Below $35,000 Per Year ■ Above $35,000 Per Year
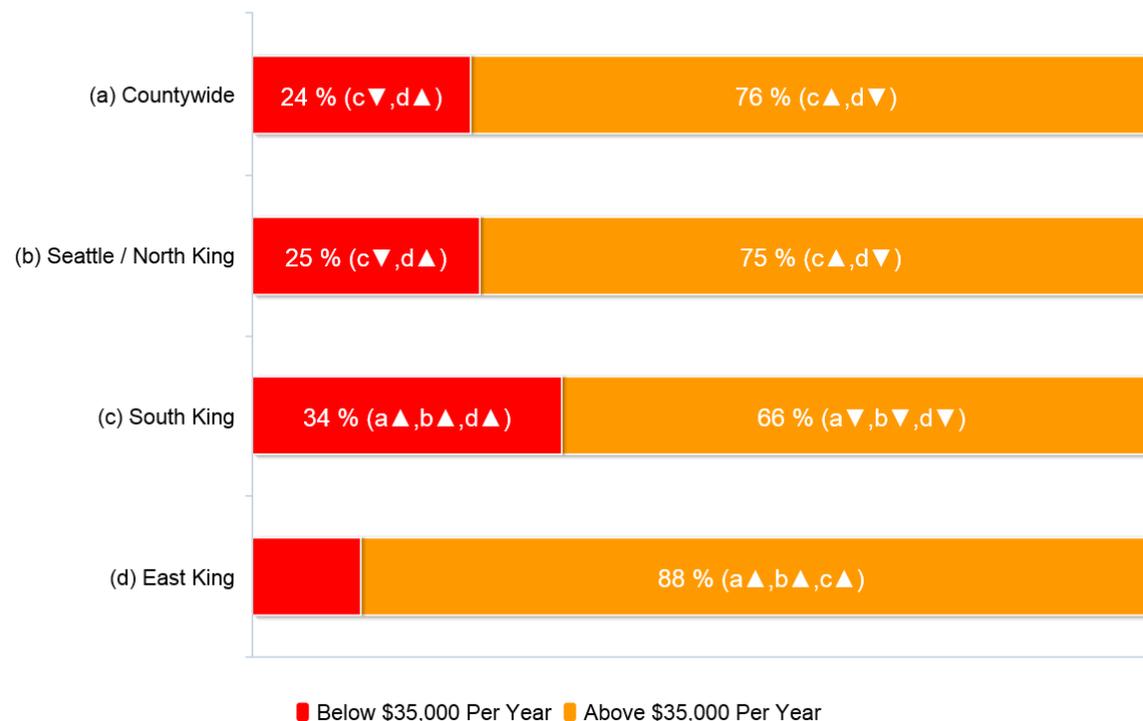
Questions: D5   Is your total annual household income above or below $35,000 per year?; D5AWould that be Less than $7,500, $7,500 up to $15,000, $15,000 up to $25,000, or $25,000 up to $35,000?
Base: Regular and Infrequent Riders; Year: 2014

	Countywide	Seattle / North King	South King	East King
n	1,102	540	273	289
n_w	1,161	449	359	353

▲ / ▼ indicates a statistically significant difference between respondent groups

Low-Income Riders living in Seattle / North King County have the lowest median household income, while those in East King County have the highest.

It should be noted that the percentage of low-income households in East King County is lower than other areas of the county, and corresponding cell sizes when looking at East King County Low-Income Riders are small.

Table 7: Low-Income Riders: Distribution of Income

	(a) All Low-Income Riders	(b) Seattle / N. King	(c) South King	(d) East King
Less than $7,500	21%	24%	18%	24%
7,500 to $15,000	24%	28%	22%	16%
$15,000 to $25,000	23%	21%	27%	20%
$25,000 to $35,000	26%	24%	27%	32%

	(a) All Low-Income Riders	(b) Seattle / N. King	(c) South King	(d) East King
Median Household Income	$17,970	$15,530	$18,628	$20,147

Base: Low-Income Riders: 2014

	All Low-Income Riders	Seattle / North King	South King	East King
n	249	128	89	32
n_w	257	105	114	38

▲ / ▼ *indicates a statistically significant difference between respondent groups*
Caution: Cell sizes in East King County are small

Low-Income Riders

There are no differences in average age of Low- and Higher-Income Riders.

- However, a greater percentage of Low-Income Riders are between the ages of 18 and 34.

Low-Income Riders are clearly differentiated from Higher-Income Riders by their employment status.

- Only two out of five Low-Income Riders are employed.
- A significant percentage of Low-Income Riders are disabled.

Low-Income Riders have a median annual household income of just under $18,000.

Nearly half of Low-Income Riders live in a household with no other members 16 years of age and older.

Low-Income Riders are diverse.

- Less than two-thirds are Caucasian.
- Significant percentages are Hispanic, black, or mixed race.

Low-Income Riders are less likely to have a driver's license or access to a vehicle.

- Only three out of five Low-Income Riders have a driver's license and/or a vehicle.

Table 8: Demographics: Low-Income Riders

	≤$35K (n=249; n$_w$=449)	>$35K (n=764; n$_w$=449)
GENDER		
MALE	42%	48%
FEMALE	58%	52%
AGE		
16–17	2%	3%
18–34	29%▲	21%▼
35–54	25%▼	36%▲
55+	45%	40%
MEAN	48.1	48.5
EMPLOYMENT STATUS*		
EMPLOYED	40%▼	74%▲
STUDENT	17%▲	9%▼
RETIRED	20%▲	15%▼
UNEMPLOYED	16%▲	3%▼
DISABLED	17%▲	1%▼
OTHER	5%	4%
MEDIAN HH INCOME	$17,986	$121,094
HH COMP (16+ YRS OF AGE)		
SINGLE-PERSON	45%▲	18%▼
MULTIPERSON	55%▼	82%▲
RACE/ETHNICITY*		
HISPANIC	13%▲	4%▼
CAUCASIAN	65%▼	81%▲
ASIAN	9%	11%
BLACK	9%▲	3%▼
OTHER	8%▲	3%
VEHICLE ACCESS		
% W/ LICENSE	61%▼	92%▲
% W/ VEHICLES	61%▼	97%▲
MEAN # VEHICLES (ALL)	0.87▼	1.97▲

Base: Regular and Infrequent Riders; Year: 2014
▲ / ▼ Indicates a statistically significant difference between respondent groups
* Columns sum to more than 100%; multiple responses allowed

FINDINGS: RIDERS' GENERAL TRAVEL BEHAVIOR

Summary

Topic	What We Found				What It Means
Frequency of Travel	After peaking in 2012, the average number of one-way trips taken by Regular Riders has decreased among those living in Seattle / North King County and East King County. On the other hand, the average number of one-way trips taken by Regular Riders living in South King County has been increasing; current frequency is significantly greater than 2012.	**2012**	**2013**	**2014**	The decrease in the average number of trips taken by Regular Riders may be due to a number of factors—a decrease in overall travel or access to alternative modes such as car and bike share programs. South King County is experiencing increases in both number of Riders and the average number of trips those Riders make. The decrease in trip frequency in East King County has been offset by ongoing growth in the number of Riders.
		All REGULAR Riders			
		26.9	26.1	24.5	
		Seattle / North King County			
		28.4	27.5	24.1▼	
		South King County			
		24.5	25.3	27.0	
		East King County			
		25.0	22.8▼	22.4	
		Significant increase (▲) or (▼) from previous year			
Length of Time Riding	While the majority of Riders are Experienced Riders (riding Metro more than one year), between 12 and 15 percent are New Riders (that is, started riding in the past year). Reflecting growth in market share, a greater percentage of Riders living in South and East King County are New Riders. • The percentage of New Riders increased significantly in South King County. Relatively few Riders in Seattle / North King County started riding in the past year.	**2012**	**2013**	**2014**	Metro's ridership growth can be attributed to the combination of retaining Experienced Riders, even as they move through lifestyle changes, as well as attracting New Riders. The decline in the percentage of New Riders in Seattle / North King County may be of some concern.
		% New Riders			
		13%	12%	14%	
		Seattle / North King County			
		10%	12%	6%▼	
		South King County			
		17%	12%	19%▲	
		East King County			
		20%	15%	19%	
		Significant increase (▲) or (▼) from previous year			

Topic	What We Found	What It Means
New Rider Demos	New Riders are significantly younger than Experienced Riders—nearly two out of five are millennials. The majority of New Riders are employed; however, a significant number are students. Even with a high percentage of students, New Riders are as affluent as Experienced Riders.	<table><tr><th></th><th>New Riders</th><th>Experienced Riders</th></tr><tr><td>16–17</td><td>5%</td><td>3%</td></tr><tr><td>18–34</td><td>38%▲</td><td>21%▼</td></tr><tr><td>35–54</td><td>33%</td><td>33%</td></tr><tr><td>55+</td><td>24%▼</td><td>44%▲</td></tr><tr><td>Mean</td><td>41.0▼</td><td>49.5▲</td></tr><tr><td>Employed</td><td>56%▼</td><td>66%▲</td></tr><tr><td>Student</td><td>21%▲</td><td>9%▼</td></tr><tr><td>Not Employed</td><td>30%</td><td>33%</td></tr><tr><td>Median Income</td><td>$67,105</td><td>$67,890</td></tr></table>*▲ / ▼ indicates a statistically significant difference between respondent groups*	Retaining these new younger Riders, notably as they transition from being students to employees, is key to long-term growth. Millennials have significantly different lifestyles, values, and motivations as well as different ways of communicating. Use of social media, mobile devices, and other technologies will be important to reach these Riders.
Primary Trip Purpose	While over time the majority of Riders have primarily used Metro to commute to work or school, a significant percentage use Metro for non-commute travel. • Those primarily using Metro for commute trips average 23 one-way trips per month while those primarily using Metro for non-commute trips average 7 one-way trips per month. The percentage primarily using Metro for non-commute trips increased somewhat in 2014. This increase is significant among riders living in Seattle / North King County.	<table><tr><th></th><th>2012</th><th>2013</th><th>2014</th></tr><tr><td colspan="4">**ALL Riders**</td></tr><tr><td>Commute</td><td>56%</td><td>60%▲</td><td>56%▼</td></tr><tr><td>Non-Commute</td><td>44%</td><td>40%▼</td><td>44%▲</td></tr><tr><td colspan="4">**Seattle / North King County**</td></tr><tr><td>Commute</td><td>56%</td><td>59%</td><td>51%▼</td></tr><tr><td>Non-Commute</td><td>44%</td><td>41%</td><td>49%▲</td></tr><tr><td colspan="4">**South King County**</td></tr><tr><td>Commute</td><td>56%</td><td>59%</td><td>56%</td></tr><tr><td>Non-Commute</td><td>44%</td><td>41%</td><td>44%</td></tr><tr><td colspan="4">**East King County**</td></tr><tr><td>Commute</td><td>55%</td><td>64%</td><td>62%</td></tr><tr><td>Non-Commute</td><td>45%</td><td>36%</td><td>38%</td></tr></table>*Significant increase (▲) or (▼) from previous year*	Riders using Metro for commute trips are clearly Metro's core market—they are the larger segment, and they take more than three times as many trips per month. At the same time, those using Metro for non-commute trips represent an important source of incremental ridership. The increase in those primarily using Metro for non-commute trips in Seattle / North King County may reflect in part the older demographics among Riders in this market as well as less access to a vehicle.

Topic	What We Found		What It Means
Other Trips on Metro	New questions were added in 2014 to provide insights into the extent Riders use Metro for trips in addition to their primary trip. Specifically, Riders were asked what percent of their total trips were represented by their primary trip. Two out of three Riders only use Metro for their primary trip. • The relatively small segment of Riders who primarily use Metro to commute to school are the most likely segment to use Metro for trips other than their primary one.	**ALL Riders** **Only Use for Primary Trip** 68% **Mostly Use for Primary Trip** 18% **Other Trips** 14% **% of Riders who Only Use Metro for Primary Trip by Primary Trip Type** **To / From Work** 69% **To / From School** 44% **Non-Commute** 72%	There are additional opportunities for ridership growth by encouraging those who only use Metro for their primary trip, notably those who only use Metro to commute to work, to use Metro for additional non-commute trips.
Dependence on Metro	The majority of Riders are "Choice Riders," relying on Metro for some or very little of their transportation needs. The extent to which Riders rely on Metro for all or most of their transportation needs has varied over the years. • The percentage of Regular Riders who rely on Metro for all or most of their transportation needs decreased significantly in 2014, due to a decrease in the extent to which Frequent Regular Riders rely on Metro for all or most of their travel.	(see table below)	King County continues to be a car-reliant community for at least some travel, making most Riders, even those who rely on Metro for a significant amount of their travel, Choice Riders. It is important to understand the other factors that motivate these riders' decision to use transit and to provide the type and quality of service they expect. The decrease in the percentage of riders who rely on Metro for all or most of their transportation needs is explained by the decrease in the percentage of Frequent Regular Riders who rely on Metro for all or most of their transportation needs.

	2012	2013	2014
ALL Riders			
All / Most	34%	36%	31%▼
Some Travel	37%	34%	35%
Very Little	29%	30%	34%▲
REGULAR Riders			
All / Most	47%	51%▲	45%▼
Frequent Regular Riders			
All / Most	57%	62%	55%▼
Moderate Regular Riders			
All / Most	23%	30%▲	24%
INFREQUENT Riders			
All / Most	11%	10%	7%

Significant increase (▲) or (▼) from previous year

Topic	What We Found		What It Means
Transit Reliant Riders Demographics	Riders who rely on Metro for all or most of their travel are clearly differentiated by their income. While the majority are employed, a significant number are unemployed or disabled. Four out of ten do not have a driver's license; three out of ten do not have access to a vehicle.	<table><tr><td></td><td>**Transit Reliant* Riders**</td></tr><tr><td><$35K</td><td>44%</td></tr><tr><td>Median</td><td>$43,824</td></tr><tr><td>Employed</td><td>61%</td></tr><tr><td>Student</td><td>15%</td></tr><tr><td>Retired</td><td>13%</td></tr><tr><td>Unemployed</td><td>10%</td></tr><tr><td>Disabled</td><td>1o%</td></tr><tr><td>% with Driver's License</td><td>62%</td></tr><tr><td>% with Access to Vehicle</td><td>70%</td></tr></table> ** Rely on Metro for all or most of their travel*	While a large percentage of Metro's transit-reliant market is what is traditionally considered Captive Riders—that is, low-income, with no access to vehicles—this is likely too narrow a view. New transit research is looking into further understanding what is being called the "Captive by Choice" market—that is, Riders who have chosen to give up vehicles and rely primarily on public transportation.
Transfer Rates	The percentage of Riders reporting that they do not transfer increased significantly in 2014, returning to 2010 levels. - Riders in Seattle / North and East King County are least likely to have to transfer for their primary trip. - The increase in Riders reporting no transfer (for their primary trip) is greatest among those living in South King County, traditionally the area where more riders had to transfer.	<table><tr><td>**2012**</td><td>**2013**</td><td>**2014**</td></tr><tr><td colspan="3">**% of Riders who Do Not Transfer (Primary Trip)**</td></tr><tr><td>50%</td><td>48%</td><td>61%▲</td></tr><tr><td colspan="3">**Seattle / North King County**</td></tr><tr><td>52%</td><td>55%</td><td>67%▲</td></tr><tr><td colspan="3">**South King County**</td></tr><tr><td>38%</td><td>32%</td><td>52%▲</td></tr><tr><td colspan="3">**East King County**</td></tr><tr><td>58%</td><td>56%</td><td>62%</td></tr></table> *Significant increase (▲) or (▼) from previous year*	Despite recent service cuts and modifications, Riders increasingly report having access to a route for their primary trip that does not require a transfer. Access to service is an important determinant of mode choice, and the increased access to direct service may account for the increases in ridership the system is experiencing.

Topic	What We Found		What It Means
Park-and-Ride Lot Use	Overall park-and-ride lot use has been increasing. However, trends in use vary by geographic area. • Use of park-and-ride lots continues to be highest in East King County; however, usage in this area has trended downwards since 2010, when 77% of all East King County Riders used a park-and-ride lot.	(see table below)	Metro's park-and-ride lot system continues to provide an important means for accessing service, particularly for Riders living in East and South King County. Increased access to direct service among riders living in Seattle / North King County may account for the recent decrease in use of park-and-ride lots among Riders in this area.

2012	2013	2014
% of Riders Using Park-and-Ride Lots in Past Year		
33%	35%	39%▲
Seattle / North King County		
18%	19%	15%▼
South King County		
49%	43%	46%
East King County		
69%	66%	62%
# of Time Use Park-and-Ride Past 30 Days		
33%	35%	39%▲
Seattle / North King County		
18%	19%	15%▼
South King County		
49%	43%	46%
East King County		
69%	66%▼	62%▼

Significant increase (▲) or (▼) from previous year

Frequency of Riding

Over the years, the average number of one-way trips taken by Regular Riders has ranged between 24 and 27.

- Riding frequency among Regular Riders peaked in 2012 and has decreased somewhat since then.

- The average for Infrequent Riders over the years has been just over two.

Figure 8: All Riders: Trends in Riding Frequency (Average Number of One-Time Rides in Past 30 Days)
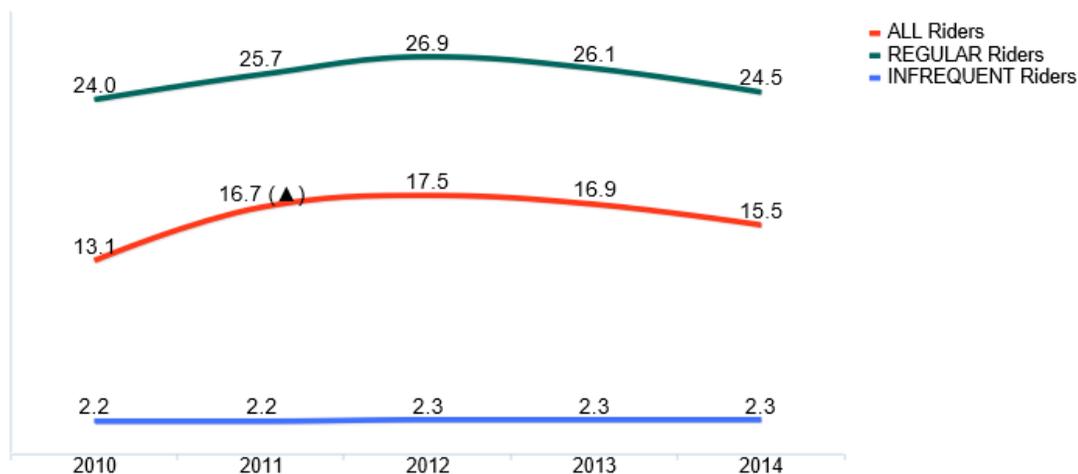
The changes in number of one-way rides taken by Regular Riders is due to changes in riding frequency among Frequent Regular Riders.

- The number of one-way trips taken by Frequent Regular Riders peaked in 2012 and has decreased somewhat since then.

- Moderate Regular Riders have generally averaged between seven and eight one-way rides.

Figure 9: Regular Riders: Trends in Riding Frequency
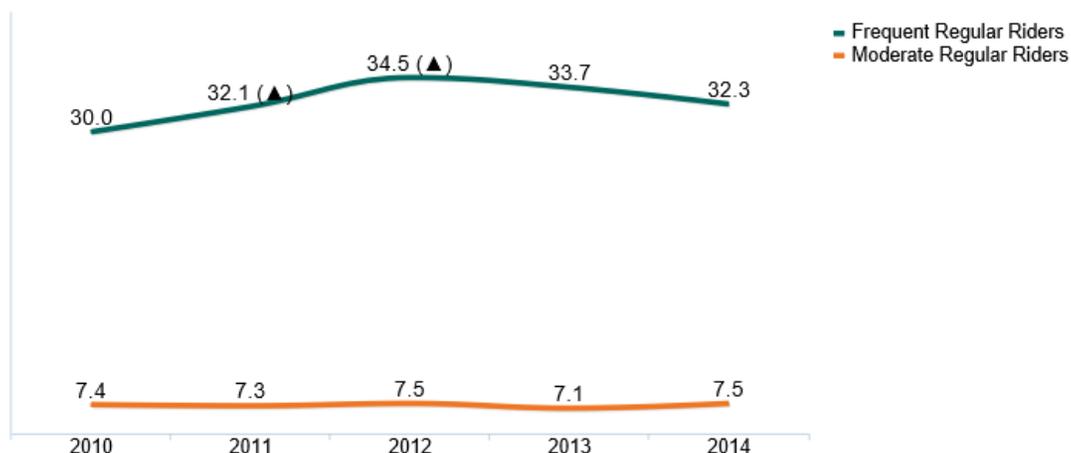
Questions: S5A/S6A Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus/South Lake Union Streetcar?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
nw	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

The number of one-way trips taken by Regular Riders living in Seattle / North King County peaked in 2012 and has decreased since then. The average number of one-way trips taken by Regular Riders in Seattle / North King County is now the same as it was in 2010.

This decrease has been offset by an increase in the frequency of one-way trips among Regular Riders in South King County.

Frequency of trips among East King County Regular Riders decreased significantly between 2011 and 2013 and appears to have stabilized in 2014.

Table 9: Regular Riders: Frequency of Riding by Area of Residence

	REGULAR Riders				
	2010	2011	2012	2013	2014
Seattle / North King	24.0	25.3	28.4 (▲)	27.5	24.1 (▼)
South King	23.1	25.3 (▲)	24.5	25.3	27.0
East King	25.2	27.7 (▲)	25.0 (▼)	22.8 (▼)	22.4

Base: Regular Riders

	2010	2011	2012	2013	2014
n	830	1,241	831	1,207	861
nw	650	443	772	567	719

▲ / ▼ indicates a statistically significant change from previous year

A different pattern emerges for Frequent Regular Riders:

- Riding frequency peaked in 2012 for Seattle / North King County Frequent Regular Riders. It has fallen steadily since then, and current frequency is significantly lower than the peak. However, it remains significantly higher than in 2010.
- Riding frequency among South King County Frequent Regular Riders also peaked in 2012 but has remained stable since then.
- Riding frequency peaked in 2012 for East King County Frequent Regular Riders. It has fallen steadily since then and is at its lowest point since 2010.

Table 10: Frequent Regular Riders: Frequency of Riding by Area of Residence

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	Frequent Regular Riders				
	2010	2011	2012	2013	2014
Seattle / N. King	29.5	31.9 (▲)	36.2 (▲)	34.3	32.8
South King	29.9	31.3	33.3 (▲)	33.7	33.8
East King	32.3	34.5 (▲)	30.3 (▼)	31.7	29.8

Base: Frequent Regular Riders

	2010	2011	2012	2013	2014
n	561	832	571	776	591
nw	440	298	529	366	498

▲ / ▼ indicates a statistically significant change from previous year

The decrease in the number of one-way rides translates into a redistribution in the percentage of Regular Riders versus infrequent Riders surveyed in 2014.

- Specifically, fewer Regular Riders were surveyed due to a significant decrease in the percentage of Moderate Regular Riders, suggesting that at least some Moderate Riders became Infrequent Riders.

  o This reverses the growth in the percentage of Moderate Regular Riders between 2010 and 2013.

- It should also be noted that the percentage of Frequent Regular Riders has been decreasing each year and is significantly lower than the peak in 2012.

Table 11: Trends in the Distribution of Rider Segments

	2010	2011	2012	2013	2014
REGULAR Riders	52%	64% (▲)	63%	63%	59%
Frequent Regular Riders	35%	43% (▲)	43%	41%	41%
Moderate Regular Riders	17%	20%	21%	22%	19% (▼)
INFREQUENT Riders	48%	36% (▼)	37%	37%	41%

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n_w	1,140	1,455	1,218	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

Differences (2014) by Area of Residence and Age

Frequency of riding varies by area of residence.

- Regular Riders living in South King County represent Metro's most frequent Riders.

- Regular Riders living in East King County take fewer trips per month. This is noteworthy among Frequent Regular Riders who average two to three fewer trips per month than those living in Seattle / North and South King County.

Table 12: Frequency of Riding by Rider Segments and Area of Residence (2014)

	(a) Seattle / North King	(b) South King	(c) East King
REGULAR Riders	24.1 (b▼)	27.0 (a▲,c▲)	22.4 (b▼)
Frequent Regular Riders	32.8 (c▲)	33.8 (c▲)	29.8 (a▼,b▼)
Moderate Regular Riders	7.3	7.6	7.6
INFREQUENT Riders	2.3	2.1	2.4

Base: Regular and Infrequent Riders; Year: 2014

	All Riders	Seattle / North King	South King	East King
n	1,102	540	273	289
n_w	1,161	449	359	353

▲ / ▼ indicates a statistically significant difference between respondent groups

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Younger Regular Riders average more rides per month than do older Regular Riders.

- Regular Riders between the ages of 18 to 34 represent Metro's most frequent riders.

- Among Frequent Regular Riders, those under the age of 35 take significantly more trips than those between the ages of 35 and 54. Those 35 to 54 take more trips than do those 55 and older.

Table 13: Frequency of Riding by Rider Segments and Age (2014)

	(a) 18 - 34	(b) 35 - 54	(c) 55 Plus
REGULAR Riders	27.6 (b▲,c▲)	24.7 (a▼,c▲)	20.9 (a▼,b▼)
Frequent Regular Riders	34.8 (b▲,c▲)	31.0 (a▼,c▲)	28.8 (a▼,b▼)
Moderate Regular Riders	7.8	7.3	7.4
INFREQUENT Riders	2.4	2.3	2.2

Base: Regular and Infrequent Riders; Year: 2014

	18–34	35–54	55+
n	265	363	418
n_w	263	377	473

▲ / ▼ indicates a statistically significant difference between respondent groups; respondents between ages of 16 and 17 not included as cell sizes are small

Length of Time Riding

The majority of Metro Riders have been riding at least one year.

- Since 2011, between 12 and 15 percent of Riders are new to the system (started riding in the past year), suggesting that much of Metro's growth in ridership has come from attracting New Riders to the system while at the same time retaining existing riders.

Figure 10: Trends in Length of Time Riding Metro (New and Experienced Riders)

Legend:
- Experienced Rider
- New Rider

Experienced Rider: 82 % (2010), 86 % (▲) (2011), 87 % (2012), 88 % (2013), 85 % (2014)

New Rider: 18 % (2010), 14 % (▼) (2011), 13 % (2012), 12 % (2013), 15 % (2014)
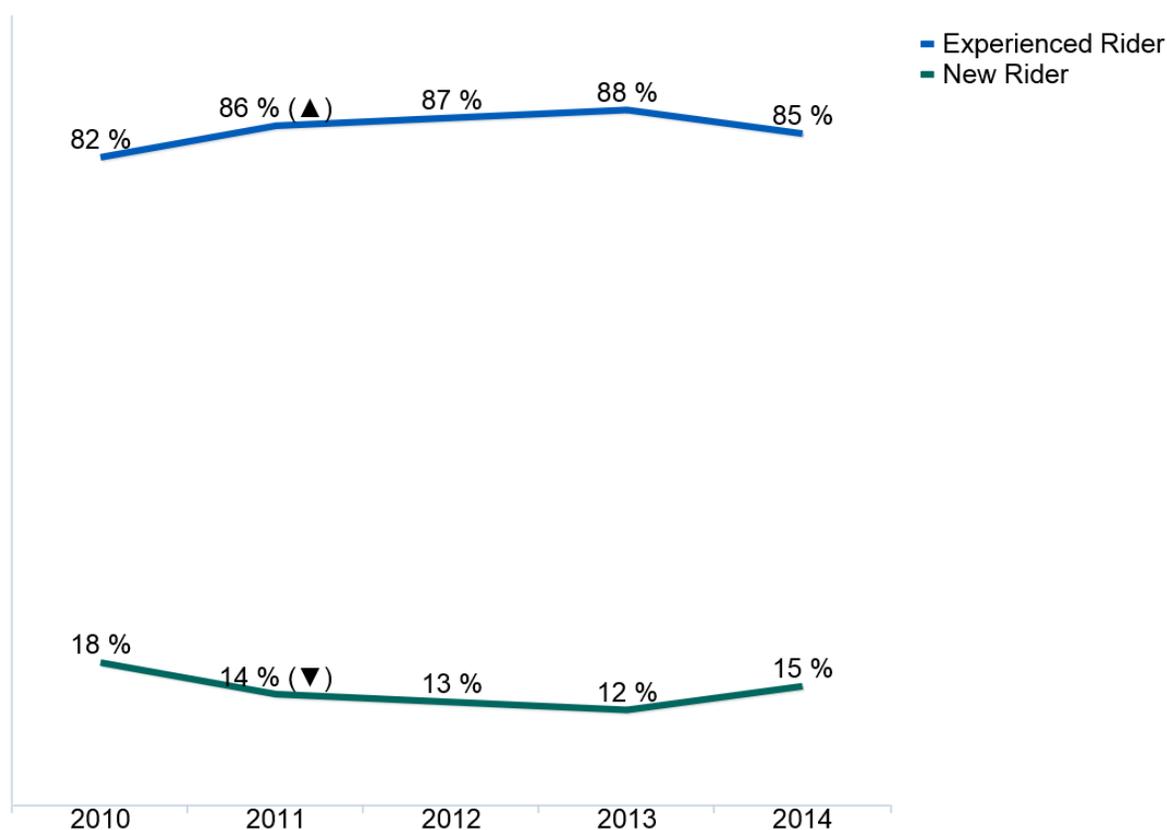
Questions M1 How long have you been riding Metro?
M1A Did you start riding Metro after September of 2013?
New Riders are defined as riders who started riding after September of the year preceding the survey
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n$_w$	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

Differences by Area of Residence

Reflecting growth in market share, a greater percentage of Riders living in South and East King County are New Riders, while those in Seattle / N. King are more likely to be Experienced Riders.

Figure 11: Percentage of New Riders by Area of Residence
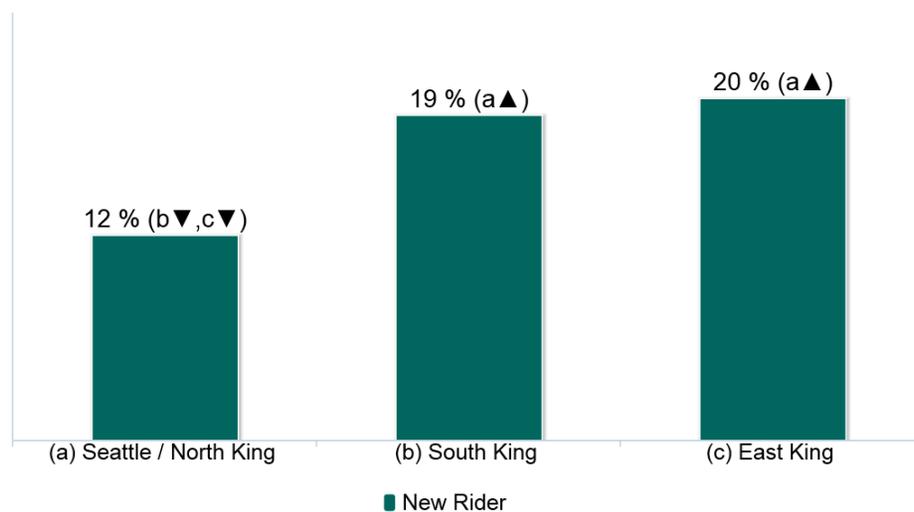
12 % (b▼,c▼)	19 % (a▲)	20 % (a▲)
(a) Seattle / North King	(b) South King	(c) East King

■ New Rider

Base: Regular and Infrequent Riders; Year: 2014

	n	nw
2014	1,102	1,161

▲ / ▼ indicates a statistically significant difference between respondent groups

In addition to having more Experienced Riders, Seattle / North King County has the highest percentage of long-term Experienced Riders.

- More than four out of five Experienced Riders living in this area have been riding five or more years.

Table 14: Experienced Riders: Length of Time Riding by Area of Residence

	(a) All Experienced Riders	Experienced Rider		
		(b) Seattle / N. King	(c) South King	(d) East King
<= 2 Years	7% (b▲,d▼)	4% (a▼,d▼)	7%	11% (a▲,b▲)
3 to 5 Years	14%	12%	15%	17%
5 Years or More	79% (b▼,d▲)	84% (a▲,c▲,d▲)	78% (b▼)	73% (a▼,b▼)

Base: Experienced Riders; Year: 2014

	All Experienced Riders	Seattle / North King	South King	East King
n	954	504	221	229
nw	992	421	287	284

▲ / ▼ indicates a statistically significant difference between respondent groups

Differences by Frequency of Riding

Frequent Regular Riders are more likely than Moderate or Infrequent Riders to be New Riders.

- Reflecting the higher percentage of Regular Riders, notably Frequent Regular Riders, New Riders take somewhat more trips than do Experienced Riders—17.2 one-way trips per month compared with 15.7 trips, respectively.

Figure 12: Percentage of New Riders by Frequency of Riding
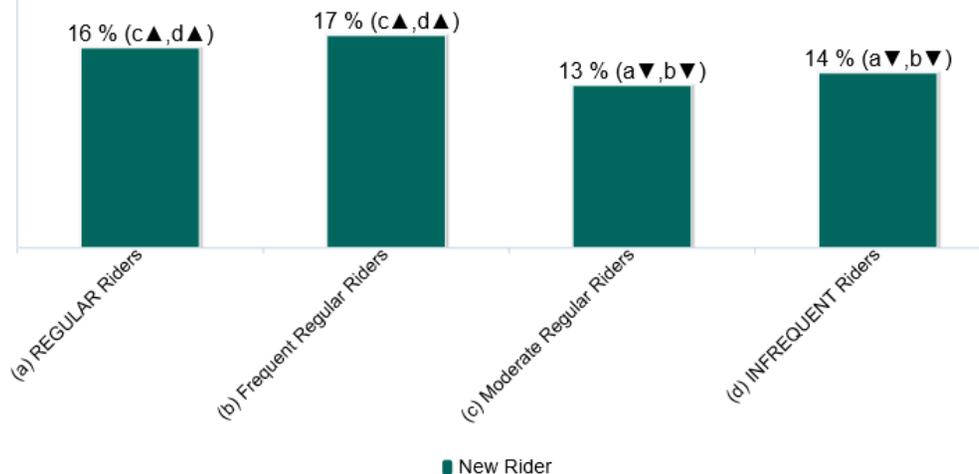
Base: Regular and Infrequent Riders; Year: 2014

	n	nw
2014	1,102	1,161

▲ / ▼ indicates a statistically significant difference between respondent groups

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Among Experienced Riders, Infrequent Riders and, to a lesser extent, Moderate Regular Riders tend to be long-time Experienced Riders (five or more years).

Table 15: Experienced Riders: Length of Time Riding by Frequency of Riding

	Experienced Rider			
	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
<= 2 Years	8% (d▲)	9% (d▲)	7%	4% (a▼,b▼)
3 to 5 Years	15%	15%	13%	14%
5 Years or More	77%	76% (d▼)	80%	82% (b▲)

Base: Experienced Riders; Year: 2014

	REGULAR Riders	INFREQUENT Riders	Frequent Regular Riders	Moderate Regular Riders
n	740	214	591	266
nw	611	382	412	197

▲ / ▼ indicates a statistically significant difference between respondent groups

Demographic Characteristics: New and Experienced Riders

There are significant differences in the demographic characteristics of New and Experienced Riders.

New Riders

- New Riders are significantly younger than Experienced Riders. More than two out of five are less than 35 years of age and thus part of the millennial generation.

- More than half of all New Riders are employed. However, a significant number are students.

- Despite their youth, there are no differences in income between New and Experienced Riders.

- New Riders are more likely than Experienced Riders to live in a household with other people 16 years of age and older.

- One out of five New Riders are Asian.

Experienced Riders

- More than two out of five Experienced Riders are 55 years of age and older.

- Experienced Riders are more likely to be employed. Two out of three are employed.

- More than three out of four Experienced Riders are Caucasian.

Table 16: Demographics: New and Experienced Riders

	NEW RIDERS (n=147; n$_w$=165)	EXPERIENCED RIDERS (n=954; n$_w$=993)
GENDER		
MALE	44%	47%
FEMALE	56%	53%
AGE		
16 –17	5%	3%
18 –34	38%▲	21%▼
35 –54	33%	33%
55+	24%▼	44%▲
MEAN	41.0▼	49.5▲
EMPLOYMENT STATUS*		
EMPLOYED	56%▼	66%▲
STUDENT	21%▲	9%▼
RETIRED	13%	17%
OTHER	17%	16%
INCOME		
<$35K	27%	26%
$35K–$55K	15%	14%
$55K–$75K	13%	16%
$75K–$100K	14%	12%
$100K+	31%	31%
MEDIAN	$67,105	$67,890
HH COMP		
SINGLE-PERSON	18%▼	26%▲
MULTIPERSON	82%▲	74%▼
RACE/ETHNICITY*		
HISPANIC	7%	7%
CAUCASIAN	63%▼	78%▲
ASIAN	21%▲	9%▼
BLACK	5%	4%
OTHER	3%	4%
VEHICLE ACCESS		
% W/ LICENSE	83%	83%
% W/ VEHICLES	86%	89%
MEAN # VEHICLES	1.75	1.73

Base: Regular and Infrequent Riders; Year: 2014
▲ / ▼ indicates a statistically significant difference between respondent groups
* Columns sum to more than 100%; multiple responses allowed

Primary Trip Purpose

While over time the majority of Riders have primarily used Metro to commute to work or school, a significant percentage use Metro for non-commute travel.

- The percentage of Riders reporting that their primary trips on Metro were commute trips increased between 2010 and 2011 and again between 2012 and 2013.

- Primary use of Metro for commuting decreased between 2013 and 2014, returning to pre-2013 levels but remaining above 2010 levels.

Figure 13: Trends in Primary Trip Purpose
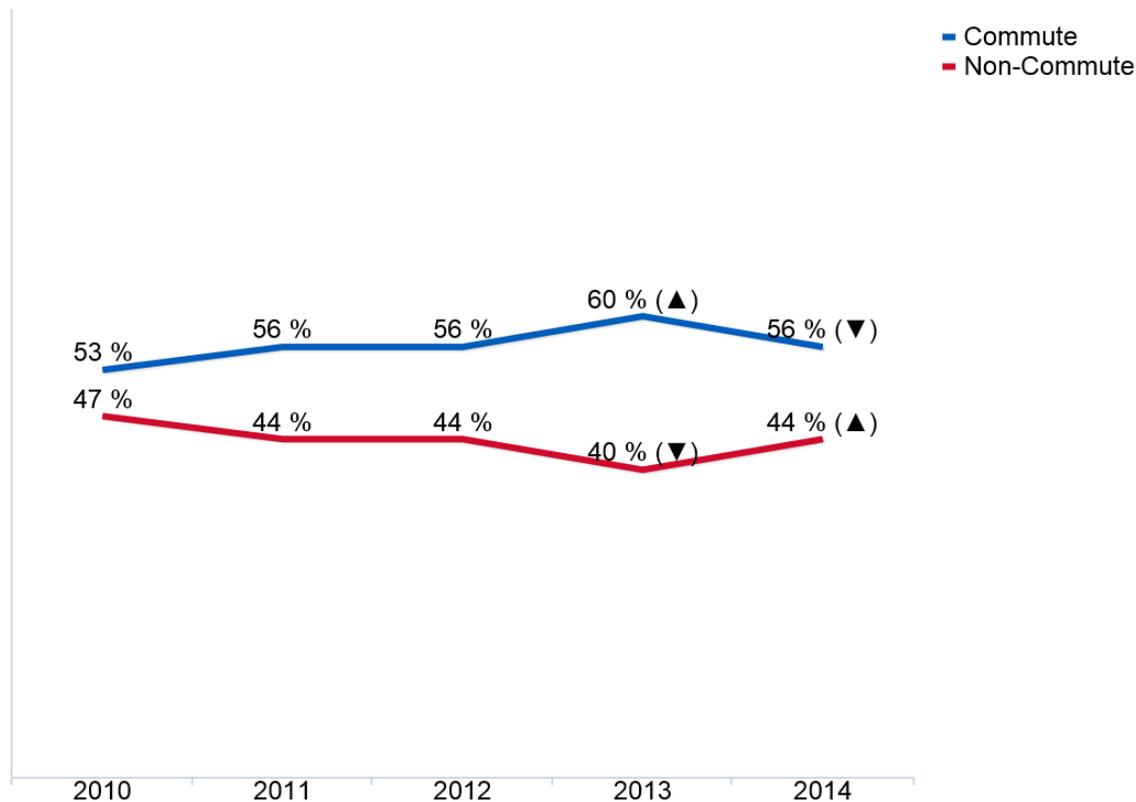
Question: M5A When you ride Metro, what is the primary purpose of the trip you take most often?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
nw	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change (90% confidence level) from previous year

| | | Riders who primarily use Metro to commute to work or school take more than three times as many one-way trips per month than those who primarily use Metro for non-commute trips. |

Riders who primarily use Metro to commute to work or school take more than three times as many one-way trips per month than those who primarily use Metro for non-commute trips.

Table 17: Number of One-Way Rides by Primary Trip Purpose

		(a) 2012	(b) 2013	(c) 2014
Number of One-Way Rides in Past 30 Days	**Commute**	26.3(b▲,c▲)	22.9(a▼)	23.0(a▼)
	Non-Commute	7.8	7.9	7.0

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	*1,140*	*1,455*	*1,218*	*1,395*	*1,102*
n_w	*1,140*	*1,455*	*1,218*	*1,395*	*1,161*

▲ / ▼ indicates a statistically significant change (90% confidence level) from previous year

The vast majority of those who primarily use Metro for commute trips are commuting to work.

Figure 14: Primary Trip Purpose for Those Who Primarily Use Metro for Commute Trips

To/From Work — 85 %
To/From School — 15 %
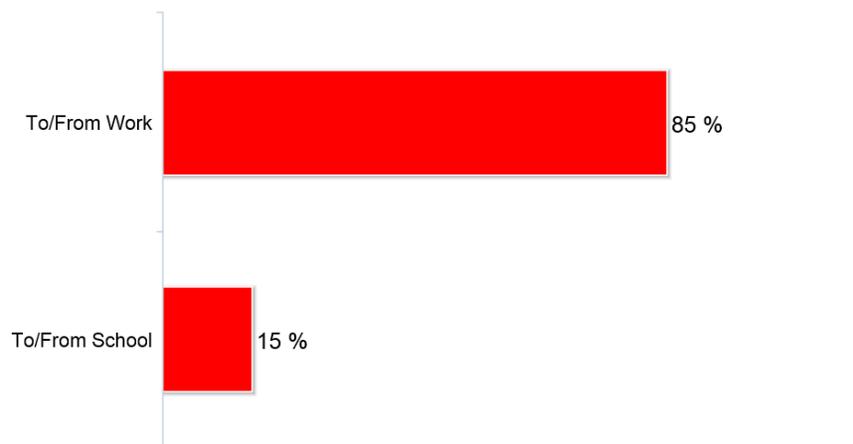
Base: Regular and Infrequent Riders Who Primarily Use Metro for Commute Trips' Year: 2014

	n	*n_w*
2014	*672*	*638*

Those who primarily use Metro for non-commute trips are usually traveling for social or recreation purposes (excluding special events) or for shopping and errands.

Figure 15: Primary Trip Purpose for Those Who Primarily Use Metro for Non-Commute Trips

Trip Purpose	Percentage
Fun / Recreation / Social	29 %
Shopping / Errands	24 %
Medical Appointments	15 %
Go Downtown	11 %
Business Appointments	6 %
Special Events	5 %
Get to Airport	3 %
To/From Volunteering	3 %
Appointments Other	1 %
Jury Duty	0 %
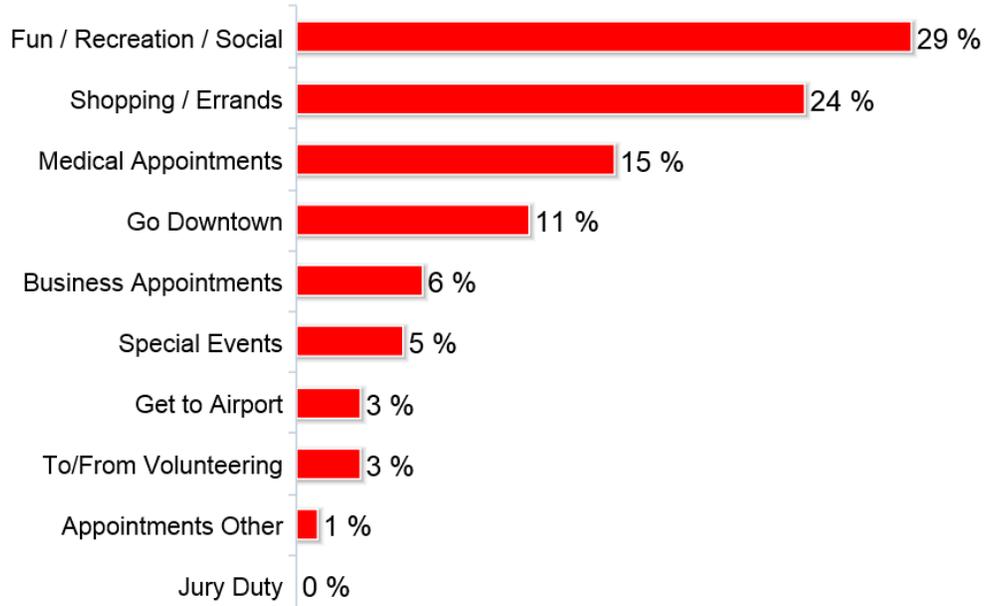
Base: Regular and Infrequent Riders Who Primarily Use Metro for Non-Commute Trips; Year: 2014

	n	n_w
2014	409	500

Differences by Rider Status and Area of Residence

As would be expected, Riders' primary trip purpose is related to the frequency with which they ride.

- Regular Riders are nearly two and a half times as likely as Infrequent Riders to primarily use Metro to commute to work or school.
  - o Nearly three out of four Regular Riders primarily use Metro for commute trip.
  - o Among Frequent Regular Riders, more than four out of five primarily use Metro to commute.
- Conversely, seven out of ten Infrequent Regular Riders primarily use Metro for non-commute trips.

Table 18: Differences in Primary Trip Purpose by Frequency of Riding

	(a) ALL Riders	(b) REGULAR Riders	(c) INFREQUENT Riders
Commute	56% (b▼,c▲)	72% (a▲,c▲)	30% (a▼,b▼)
Non-Commute	44% (b▲,c▼)	28% (a▼,c▼)	70% (a▲,b▲)

	(a) Frequent Regular Riders	(b) Moderate Regular Riders
Commute	83% (b▲)	47% (a▼)
Non-Commute	17% (b▼)	53% (a▲)

Base: Regular and Infrequent Riders; Year: 2014

	ALL Riders	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	1,102	861	591	266	241
n$_w$	1,161	719	498	218	442

▲ / ▼ indicates a statistically significant difference between respondent groups

Primary trip purpose varies by area of residence.

- Riders living in Seattle / North King County are almost equally split between those using Metro for commute versus non-commute trips.
- Riders living in East King County are the most likely to primarily use Metro for commute trips.

Table 19: Differences in Primary Trip Purpose by Area of Residence

	(a) ALL Riders	(b) Seattle / North King	(c) South King	(d) East King
Commute	56% (d▼)	51% (d▼)	56%	62% (a▲,b▲)
Non-Commute	44% (d▲)	49% (d▲)	44%	38% (a▼,b▼)

Base: Regular and Infrequent Riders; Year: 2014

	ALL Riders	Seattle / North King	South King	East King
n	1,102	540	273	289
n$_w$	1,161	449	359	353

▲ / ▼ indicates a statistically significant difference between respondent groups

Demographic Characteristics

There are significant differences between those who primarily use Metro to commute to work or school and those using Metro for non-commute trips.

Commute to Work

- Those primarily using Metro to commute to work are equally likely to be men versus women.
- Two out of three Riders primarily using Metro to get to work are between the ages of 35 and 64.
- As would be expected those primarily using Metro to commute to work are more affluent.

Commute to School

- As would be expected those primarily using Metro to get to school are younger than those who primarily use Metro to get to work or for non-commute trips.
  - More than four out of five Riders who primarily use Metro to commute to school are between the ages of 16 and 34. Reflecting their youth, fewer Riders who primarily use Metro to commute to school have a driver's license; however, the majority has access to a vehicle.

Non-Commute

- Those primarily using Metro for non-commute trips or to commute to school are more likely to be women than men.
- Six out of ten Riders primarily using Metro for non-commute trips are 55 and older.
- One out of three Riders who primary use Metro for non-commute trips are retired; one out of four are:
  - Homemakers (8%), not currently employed (8%), disabled (9%), or something else.
- There is a clear dichotomy within those primarily using Metro for non-commute trips. One-third have annual household incomes below $35,000 while a significant percentage have incomes $100,000 and higher.

Table 20: Demographics: Primary Trip Purpose

	TO WORK (n=573; n$_w$=539)	TO SCHOOL (n=99; n$_w$=99)	OTHER (n=409; n$_w$=500)
GENDER			
MALE	50%▲	41%	43%▼
FEMALE	50%▼	59%	57%▲
AGE			
16 −17	0%	29%▲	1%
18 −34	25%▼	55%▲	14%▼
35 −54	44%▲	9%▼	26%▼▲
55+	31%▲▼	7%	59%▲▲
MEAN	45.7▲	25.9▼	55.6▲▲
EMPLOYMENT STATUS*			
EMPLOYED	93%▲	23%▼▲	43%▲
STUDENT	4%▼	85%▲	4%▼
RETIRED	2%▼	3%▼	34%▲
OTHER	7%▼	14%▼	25%▲
INCOME			
<$35K	17%▼	38%▲	33%▲
$35K–$55K	14%	13%	14%
$55K–$75K	18%	19%	13%
$75K–$100K	12%	15%	13%
$100K+	38%▲	15%▼	27%▲
MEDIAN	$76,909	$53,182	$60,439
HH COMP (16+ YEARS)			
SINGLE-PERSON	15%▼	14%▼	37%▲
MULTIPERSON	85%▲	86%▲	63%▼
RACE/ETHNICITY*			
HISPANIC	7%	5%	5%
CAUCASIAN	73%▲	59%▼	82%▲
ASIAN	13%▼▲	23%▲	6%▼
BLACK	5%▲	9%▲	3%▼
OTHER	5%	6%	2%
VEHICLE ACCESS			
% W/ LICENSE	87%▲	62%▼	85%▲
% W/ VEHICLES	92%▲	92%▼	84%▲
MEAN # VEHICLES	1.82	2.06	1.59

Base: Regular and Infrequent Riders; Year: 2014
▲ / ▼indicates a statistically significant difference between respondent groups
* Columns sum to more than 100%; multiple responses allowed

Use of Metro for Trips Other Than for Primary Trip

New questions were added in 2014 to determine the extent to which Riders use Metro for trips in addition to their primary trip. Specifically, Riders were asked what percent of their total trips were represented by their primary trip.

- More than two out of three Riders only use Metro for their primary trip.

Figure 16: Extent to Which Riders Use Metro for Trips Other Than Primary Trip
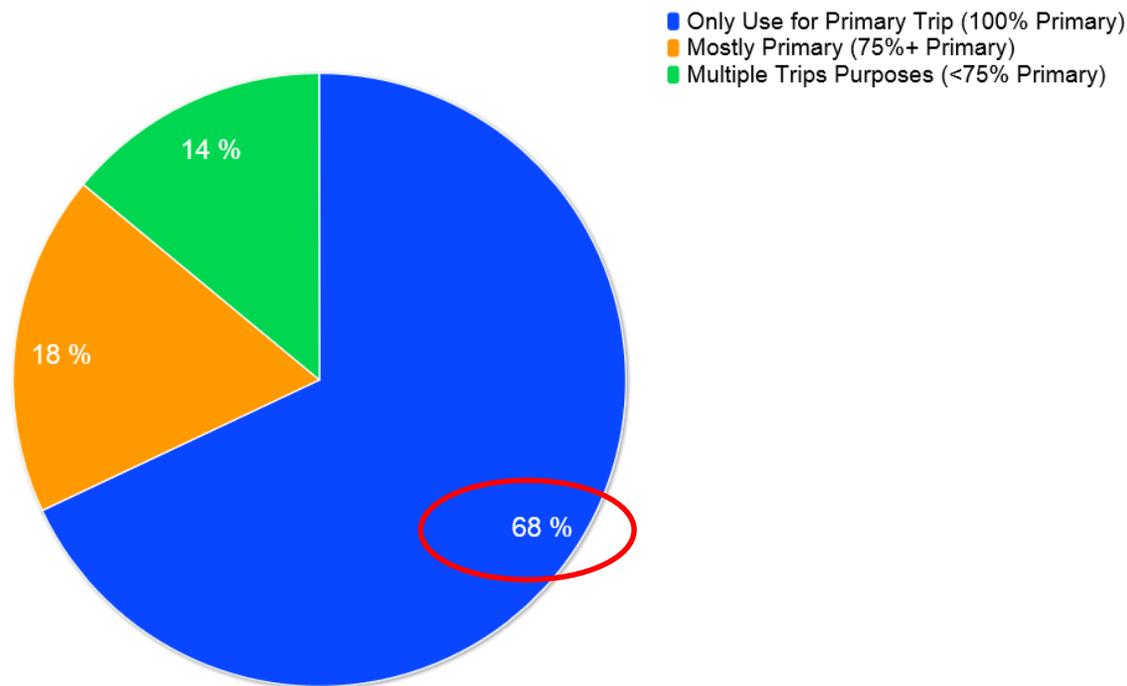
Legend:
- ■ Only Use for Primary Trip (100% Primary)
- ■ Mostly Primary (75%+ Primary)
- ■ Multiple Trips Purposes (<75% Primary)

14 %
18 %
68 %

Question: M5B You indicated that you took [RESTORE NUMRIDES] one-way trips on Metro in the past 30 days. What percentage of these trips were for [RESTORE PRIMARY TRIP PURPOSE]?
Base: Regular and Infrequent Riders; Year 2014

	n	n_w
2014	1,102	1,161

While a small segment, those who primarily use Metro to commute to school are less likely than other Riders to only use Metro for their primary trip.

- Nearly three out of five Riders who primarily use Metro to commute to school also use Metro for other trips.

Table 21: Extent to Which Riders Use Metro for Trips Other Than Primary Trip by Primary Trip Purpose

	(a) To/From Work	(b) To/From School	(c) Non-Commute
Only Use for Primary Trip (100% Primary)	69% (b▲)	44% (a▼,c▼)	72% (b▲)
Mostly Primary (75%+ Primary)	22% (b▼,c▲)	37% (a▲,c▲)	10% (a▼,b▼)
Multiple Trips Purposes (<75% Primary)	9% (b▼,c▼)	19% (a▲)	18% (a▲)

Base: Regular and Infrequent Riders; Year 2014

	To / From Work	To / From School	Non-Commute
n	573	99	409
n_w	539	99	500

Among those that use Metro for more than one type of trip, the most common trips are non-commute trips—fun and recreation or shopping and errands.

- This is true for those who use Metro primarily to commute to work or school as well as those who primary use Metro for other non-commute trips.

Figure 17: Trips Taken Other than Primary Trip by Primary Trip Purpose
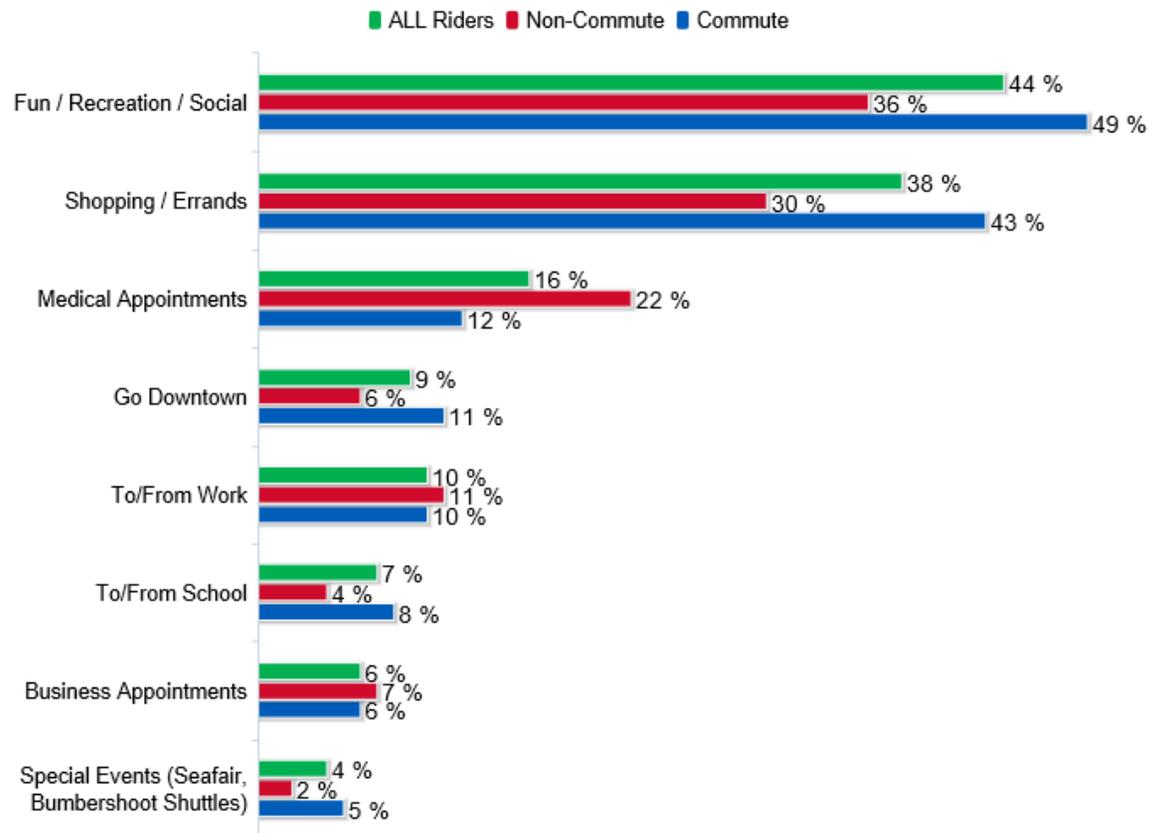
Question: M5C You indicated that the primary purpose of the trip you take most often is for [RESTORE RESPONSE TO M5A]. What other trips do you take on Metro?]?

Base: Regular and Infrequent Riders Who Take Trips Other Than their Primary Trip; Year: 2014

	n	n_w
2014	410	356

Differences by Frequency of Riding

As would be expected (given number of trips), Infrequent Riders are more likely to use Metro solely for a single type of trip.

- Nearly nine out of ten Infrequent Riders use Metro for a single trip purpose.

Nearly three out of five Regular Riders use Metro for a single trip purpose.

- Nearly nine out ten (87%) Frequent Regular Riders report that 75 percent or more of their trips are for their primary trip.
- Moderate Regular Riders are more likely to use Metro for more than one type of trip—nearly one fourth use Metro for multiple trip purposes.

Table 22: Riders: Use of Metro for Trips Other Than Primary Trip by Frequency of Riding

	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
Only Use for Primary Trip	57% (d▼)	56% (d▼)	58% (d▼)	87% (a▲,b▲,c▲)
Most (75%+) for Primary Trip	28% (c▲,d▲)	31% (c▲,d▲)	19% (a▼,b▼,d▲)	3% (a▼,b▼,c▼)
Some Trips Other Than Primary Trip	16% (c▼,d▲)	13% (c▼)	23% (a▲,b▲,d▲)	11% (a▼,c▼)

Base: Regular and Infrequent Riders; Year: 2014

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	861	591	266	241
n_w	718	498	218	442

▲ / ▼ *indicates a statistically significant difference between respondent groups*

The extent to which Regular Riders use Metro for more than one type of trip varies significantly by area of residence.

- The majority of Regular Riders living in East and, to a lesser extent, South King County use Metro solely for their primary trip.
- On the other hand, more than three out of five Regular Riders living in Seattle / North King County use Metro for multiple trip purposes.

Table 23: Regular Riders: Use of Metro for Trips Other Than Primary Trip by Area of Residence

	REGULAR Riders		
	(a) Seattle / North King	(b) South King	(c) East King
Only Use for Primary Trip	42% (b▼,c▼)	65% (a▲)	68% (a▲)
Most (75%+) for Primary Trip	39% (b▲,c▲)	18% (a▼)	23% (a▼)
Some Trips Other Than Primary Trip	19% (c▲)	17% (c▲)	8% (a▼,b▼)

Base: Regular Riders; Year: 2014

	Seattle / North King	South King	East King
n	417	222	222
n_w	289	226	203

▲ / ▼ *indicates a statistically significant difference between respondent groups*

Dependence on Transit

Over the years, the majority of Riders are Choice Riders, relying on Metro for some or very little of their transportation needs.

The extent to which Riders rely on Metro for all or most of their transportation needs has varied over the years.

- The percentage of Riders who rely on Metro for all or most of their transportation needs decreased significantly in 2014.

Figure 18: Dependence on Transit
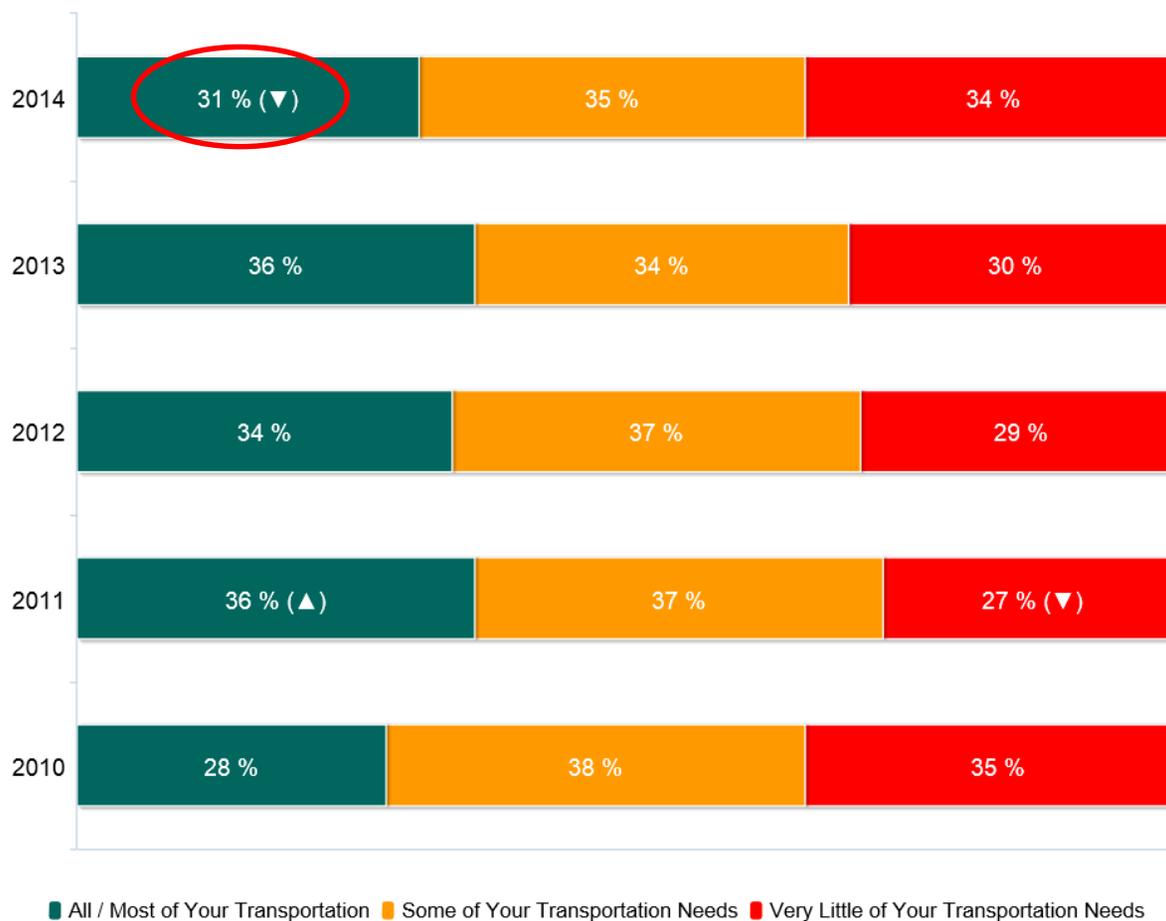
Question: M4 Now, thinking about all of your travel around King County, to what extent do you use Metro to get around?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
nw	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

Differences by Area of Residence and Frequency of Riding

The extent to which Riders rely on Metro for all or more of their transportation needs reflects in part the characteristics of the geographic regions.

- Nearly two out of five South King County Riders rely on Metro for all or most of their transportation needs, due in part to higher incidence of Low-Income Riders.

- Reflecting higher density and availability of service, one out of three Seattle / North King County Riders rely on Metro for all or most of their transportation needs.

Figure 19: Dependence on Transit by Area of Residence
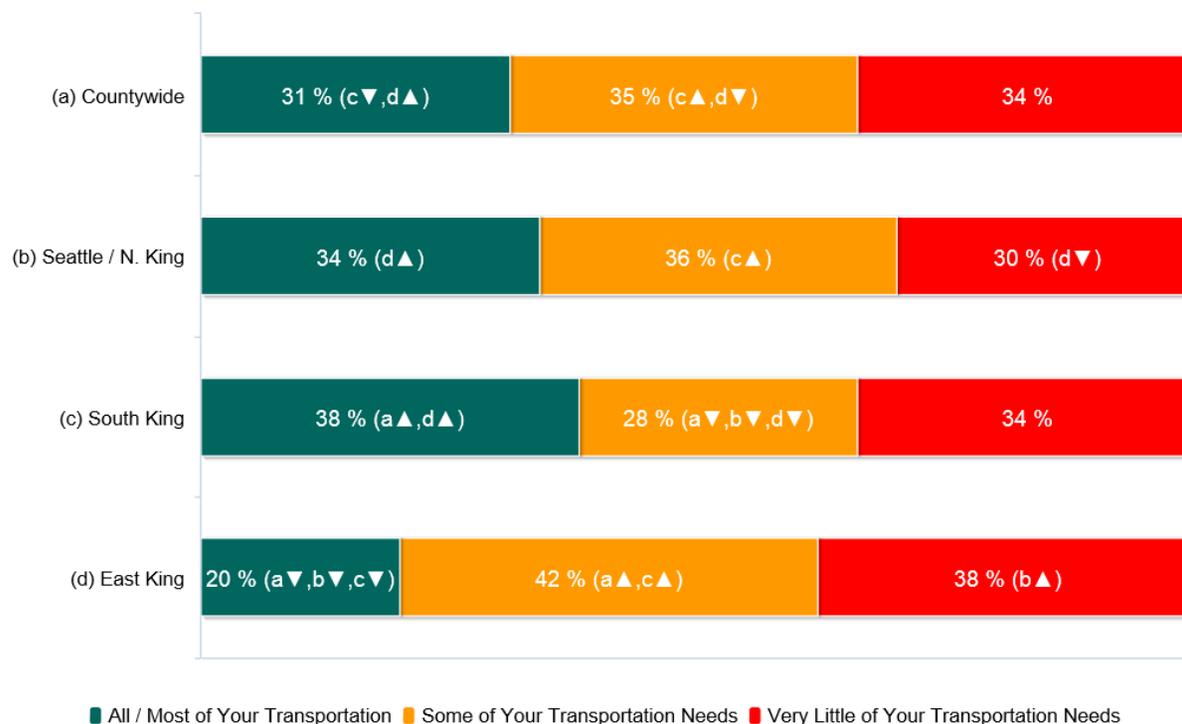
- All / Most of Your Transportation   - Some of Your Transportation Needs   - Very Little of Your Transportation Needs

Base: Regular and Infrequent Riders; Year: 2014

	Countywide	Seattle / North King	South King	East King
n	1,102	540	273	289
nw	1,161	449	359	353

The extent to which Riders rely on Metro also varies significantly by the frequency with which they ride.

- More than half of Frequent Regular Riders rely on Metro for all or most of their transportation needs.

  - As noted in the demographic analysis (Table 4), Frequent Regular Riders are significantly less likely to have a driver's license and/or access to a vehicle.

Figure 20: Dependence on Transit by Frequency of Riding
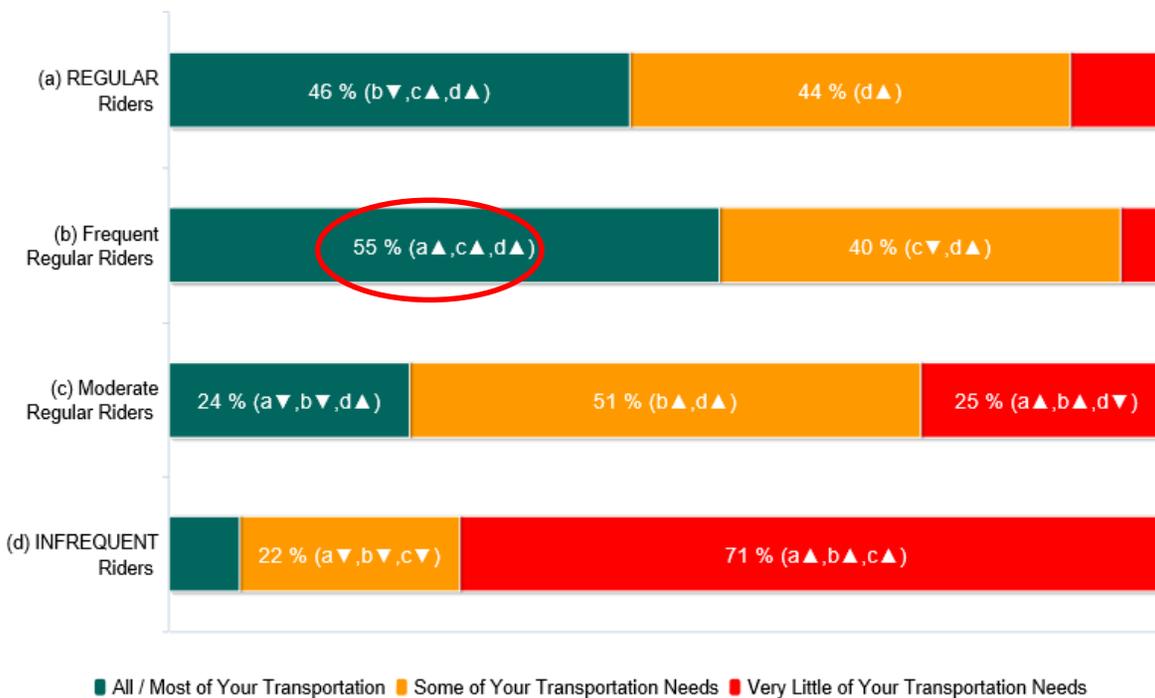
Percentages for small bars (<10%) are not shown
Base: Regular and Infrequent Riders; Year: 2014

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	861	591	266	241
n_w	718	498	218	442

▲ / ▼ indicates a statistically significant difference between respondent groups

Demographic Characteristics

Rely on Metro for All or Most of Their Transportation Needs

Those relying on Metro for all or most of their transportation needs are clearly differentiated from those choosing to ride Metro. These Transit-Reliant Riders are:

- Younger—one-third are under the age of 35.

- Less affluent—more than two out of five have annual household incomes below $35,000.

- Mostly employed. However, a significant percentage are currently unemployed (10%), and/or disabled (11%).

- Less likely to have a drivers' license and/or access to a vehicle. Nearly four out of ten do not have a driver's license, and three out of ten do not have access to a vehicle.

Base: Regular and Infrequent Riders; Year: 2014
▲ / ▼ Indicates a statistically significant difference between respondent groups
* Columns sum to more than 100%; multiple responses allowed

Table 24: Demographics: Dependence on Transit

	ALL / MOST (n=409; n$_w$=538)	SOME (n=430; n$_w$=410)	VERY LITTLE (n=262; n$_w$=392)
GENDER			
MALE	46%	45%	49%
FEMALE	54%	55%	51%
AGE			
16–17	3%	3%	2%
18–34	31%▲	25%▲	13%▼▼
35–54	30%	35%	33%
55+	36%▼	36%▼	51%▲▲
MEAN	45.4▼	46.6▼	52.6▲▲
EMPLOYMENT STATUS*			
EMPLOYED	61%▼	68%▲	65%
STUDENT	15%	13%	6%
RETIRED	13%▼	15%▼	22%▲▲
DISABLED	10%▲▲	2%	2%
OTHER	14%▲	8%▼	12%
INCOME			
<$35K	44%▲▲	19%▼	16%▼
$35K–$55K	15%	14%	13%
$55K–$75K	14%	18%	16%
$75K–$100K	8%▼▼	14%▲	15%▲
$100K+	18%▼▼	36%▲	40%▲
MEDIAN	$43,824	$74,683	$84,135
HH COMP (16+ YEARS)			
SINGLE-PERSON	27%▲	21%▼▼	27%▲
MULTIPERSON	73%▼	79%▲▲	73%▼
RACE/ETHNICITY*			
HISPANIC	10%▲▲	4%▼	5%▼
CAUCASIAN	66%▼▼	76%▲▼	84%▲▲
ASIAN	16%▲	11%▲	6%▼▼
BLACK	6%▲	5%▲	2%▼▼
OTHER	7%	3%	2%
VEHICLE ACCESS			
% W/ LICENSE	62%▼▼	90%▲▼	95%▲▲
% W/ VEHICLES	70%▼▼	97%▲	96%▲
MEAN # VEHICLES	1.23▼	1.90▲	2.01▲

Travel Times

Peak and Off-Peak Travel

To determine the general times Riders use Metro, a shortened version of the standard question sequence was used in 2014. As a result, results for 2014 are not directly comparable to prior years.

- Just over half of all Regular and Infrequent Riders use Metro during peak and off-peak hours. However, a significant percentage ride during peak hours only.

Figure 21: Peak and Off-Peak Travel

Legend:
- Peak hours only
- Off-peak hours only
- Both peak and off-peak hours

29 %
53 %
18 %
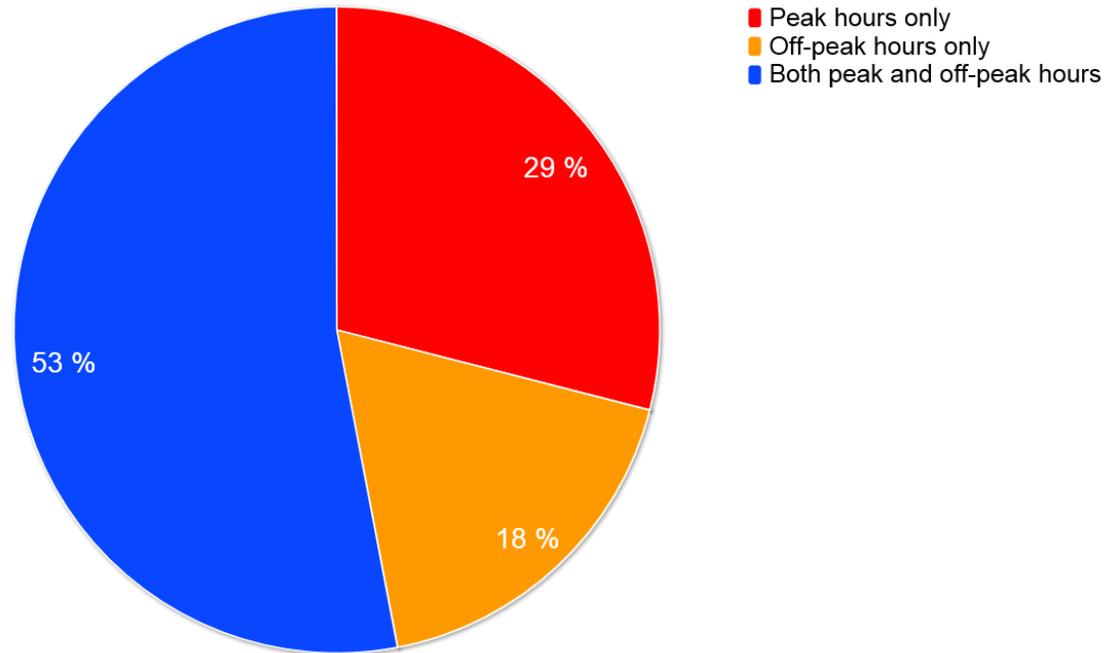
Question: NEWM6   Do you usually ride the bus or streetcar during peak hours only, off-peak hours only, both peak and off-peak hours?
Base: Regular and Infrequent Riders; Year: 2014

	n	n_w
2014	*1,102*	*1,161*

As would be expected, travel times vary by the primary trip Riders take on Metro.

- Riders who primarily use Metro to commute to work or school are most likely to ride during peak and off-peak hours.
- A significant percentage of those who primarily use Metro to commute to work ride during peak hours only.

Table 25: Peak and Off-Peak by Primary Trip Purpose

	(a) To/From Work	(b) To/From School	(c) Non-Commute
Peak hours only	30% (b▲,c▲)	12% (a▼,c▲)	5% (a▼,b▼)
Off-peak hours only	3% (b▼,c▼)	6% (a▲,c▼)	16% (a▲,b▲)
Both peak and off-peak hours	67% (b▼,c▼)	83% (a▲)	79% (a▲)

Base: Regular and Infrequent Riders; Year: 2014

	To / From Work	To / From School	Non-Commute
n	573	99	409
n_w	539	99	500

▲ / ▼ indicates a statistically significant difference between respondent groups

Regular Riders are more likely than Infrequent Riders to report that they ride during peak and off-peak hours.

- While a large majority of Frequent Regular Riders ride during peak and off-peak hours, nearly one out of four ride only during peak hours.

- While the majority of Infrequent Riders also ride during both peak and off-peak hours, a significant percentage ride during off-peak hours only.

Table 26: Riders: Peak and Off-Peak Travel by Frequency of Riding

	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
Peak hours only (6-9am and 3-6pm)	20% (b▼,c▲,d▲)	23% (a▲,c▲,d▲)	15% (a▼,b▼)	13% (a▼,b▼)
Off-peak hours only	9% (b▲,c▼,d▼)	6% (a▼,c▼,d▼)	17% (a▲,b▲,d▼)	31% (a▲,b▲,c▲)
Both peak and off-peak hours	70% (d▲)	71% (d▲)	68% (d▲)	56% (a▼,b▼,c▼)

Base: Regular and Infrequent Riders; Year: 2014

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	861	591	266	241
n_w	718	498	218	442

▲ / ▼ indicates a statistically significant difference between respondent groups

Riders living in East and, to a lesser extent, South King County are more likely than Seattle / North King County Riders to ride only during peak hours.

- Frequent Regular Riders living in Seattle / North King County are the most likely to say they ride during both peak and off-peak hours.

On the other hand, Frequent Regular Riders living in East and, to a lesser extent, South King County say they only ride during peak hours.

Table 27: Frequent Regular Riders: Peak and Off-Peak Travel by Area of Residence

	(a) Seattle / North King	(b) South King	(c) East King
Peak hours only	17% (b▼,c▼)	29% (a▲)	34% (a▲)
Off-peak hours only	6%	5%	4%
Both peak and off-peak hours	76% (b▲,c▲)	65% (a▼)	61% (a▼)

Base: Frequent Regular Riders; Year: 2014

	Countywide	Seattle / North King	South King	East King
n	*1,102*	*540*	*273*	*289*
n$_w$	*1,102*	*449*	*359*	*353*

▲ / ▼ *indicates a statistically significant difference between respondent groups*

After Dark

There has been a significant increase in the frequency with which Riders are using Metro when it is dark.

- More than four out of ten Riders frequently use Metro when it is dark—up from just over three out of ten in 2013 and 2012.

Figure 22: Extent to Which Riders Use Metro When It Is Dark

	2014
2014	41 % (▲) — 26 % — 18 % — 15 % (▼)
2013	32 % — 24 % — 21 % — 24 % (▲)
2012	32 % — 26 % — 24 % — 17 %

■ Frequently ■ Sometimes ■ Rarely ■ Never

Question: PS1A In the past year, how often have you ridden the bus or streetcar when it is dark?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n_w	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

As would be expected, Regular Riders, notably Frequent Regular Riders are more likely than Infrequent Riders to use Metro when it is dark.

- Two out of three Frequent Regular Riders frequently use Metro when it is dark.

Figure 23: Extent to Which Riders Use Metro When It Is Dark by Frequency of Riding

(a) REGULAR Riders — 56 % (b▼,c▲,d▲) | 25 % (c▼) | 19 % (b▲,c▼,d▼)

(b) Frequent Regular Riders — 66 % (a▲,c▲,d▲) | 21 % (c▼)

(c) Moderate Regular Riders — 34 % (a▼,b▼,d▲) | 35 % (a▲,b▲,d▲) | 31 % (a▲,b▲,d▼)

(d) INFREQUENT Riders — 17 % (a▼,b▼,c▼) | 26 % (c▼) | 57 % (a▲,b▲,c▲)

■ Frequently ■ Sometimes ■ Rarely / Never

Base: Regular and Infrequent Riders; Year: 2014

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	861	591	266	241
n_w	718	498	218	442

▲ / ▼ indicates a statistically significant difference between respondent groups

Transferring

Overall Transfer Rates

The percentage of Riders reporting their primary trip does not require a transfer increased significantly in 2014, returning to 2010 levels. At the same time, there has been a decrease in the percentage of Riders taking trips that require two or more transfers.

- Three out of five Riders report that they have no transfers on their primary trip. This is a significant increase from 2011 through 2013 when just half of all Riders took a primary trip that did not require a transfer.

Figure 24: Transfer Rates for Primary Trip

Year	No Transfers	1 Transfer	2+ Transfers
2014	61 % (▲)	25 % (▼)	14 % (▼)
2013	48 %	33 %	18 % (▲)
2012	50 %	33 %	15 %
2011	49 % (▼)	35 % (▲)	14 %
2010	60 %	26 %	13 %

■ No Transfers ■ 1 Transfer ■ 2+ Transfers
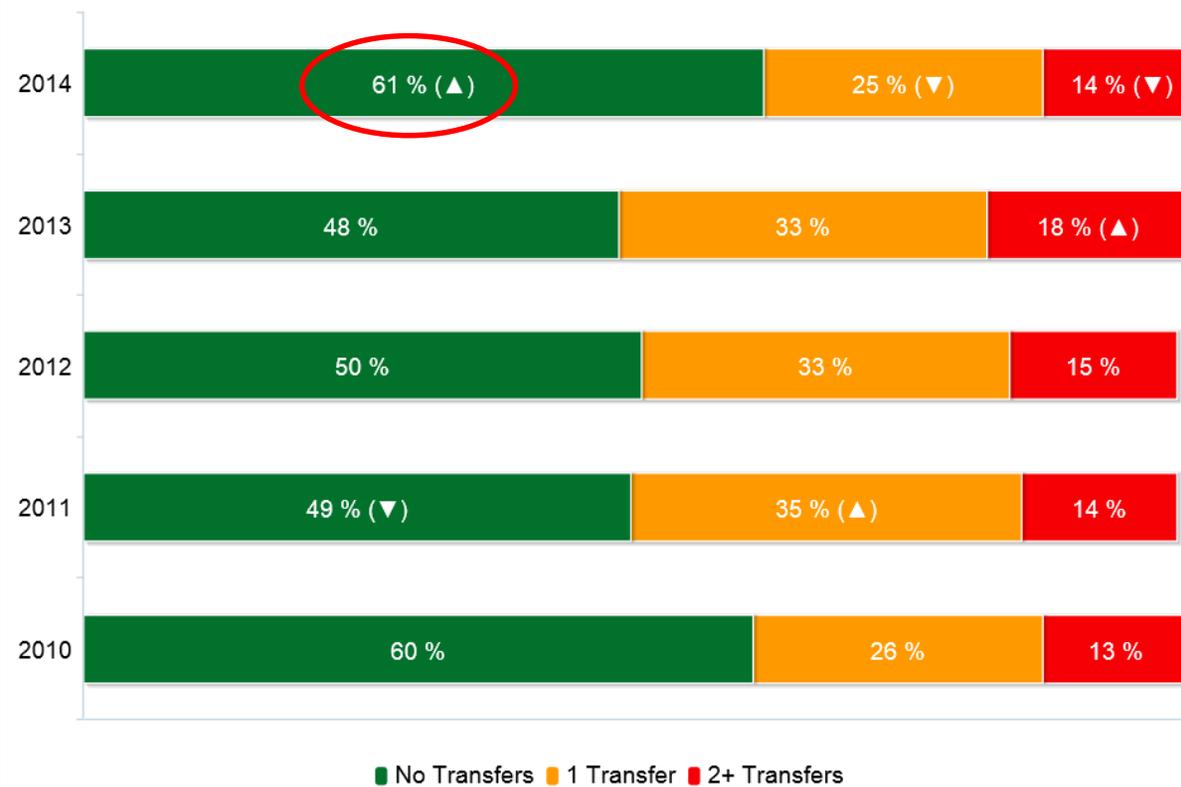
Question: TRIP_5A How many transfers do you usually make on the trip you take most often?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n_w	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

The percentage reporting that they do not transfer on their primary trip increased significantly among Riders living in South King County and, to a lesser extent, in Seattle / North King County.

- More than half of all Riders in South King County now report they have direct service available—up from just over three out of ten in 2013—returning to 2010 levels.

- The extent to which Seattle / North King County Riders take a primary trip with no transfers dropped significantly in 2011 and has been increasing each year since 2012.

The extent to which East King County Riders transfer on their primary trip has not changed significantly over the years.

Table 28: Trends in No Transfers on Primary Trip by Area of Residence

	2010	2011	2012	2013	2014
Seattle / North King	62%	51% (▼)	52%	55%	67% (▲)
South King	50%	32% (▼)	38%	32%	52% (▲)
East King	63%	59%	58%	56%	62%

Base: Regular and Infrequent Riders

		2010	2011	2012	2013	2014
Seattle / North King	n	539	547	418	509	540
	n_w	705	421	771	446	449
South King	n	289	450	400	442	273
	n_w	228	151	237	273	359
East King	n	312	458	400	444	289
	n_w	208	121	210	152	353

▲ / ▼ *indicates a statistically significant change from previous year*

Wait Time When Transferring

Wait times when transferring have varied little over the years.

- Currently Riders who transfer wait an average of 15 minutes. Nearly half wait 10 minutes or less; seven out of ten riders wait 15 minutes or less.

There are some Riders with very long wait times.

- Nearly one-third wait more than 15 minutes, and 16 percent report waiting 20 minutes or more.

Figure 25: Wait Time When Transferring
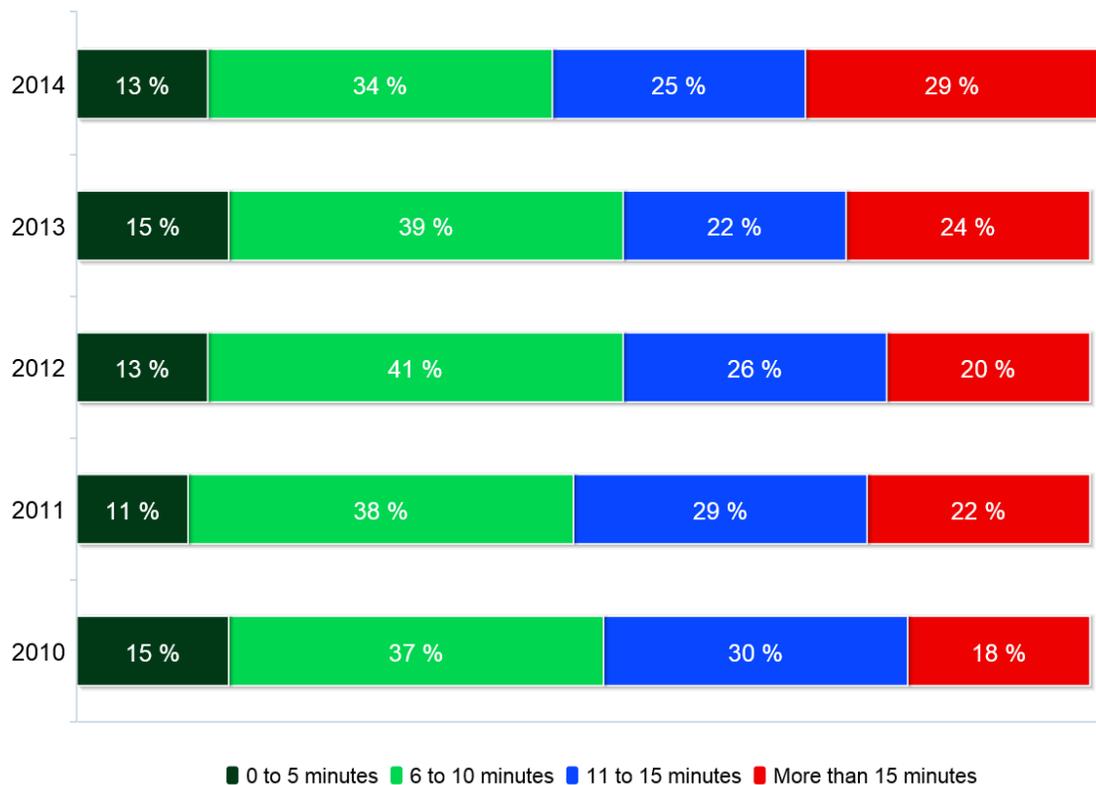
	0 to 5 minutes	6 to 10 minutes	11 to 15 minutes	More than 15 minutes
2014	13 %	34 %	25 %	29 %
2013	15 %	39 %	22 %	24 %
2012	13 %	41 %	26 %	20 %
2011	11 %	38 %	29 %	22 %
2010	15 %	37 %	30 %	18 %

Question: TRIP_5C   When you transfer, how long do you usually wait for the bus or streetcar?
Base: Regular and Infrequent Riders who Transfer

	2010	2011	2012	2013	2014
n	476	724	614	710	455
nw	457	356	601	463	440

▲ / ▼ *indicates a statistically significant change from previous year*

Wait time when transferring varies significantly by area of residence.

- Riders living in South King County have the longest wait times; three out of ten report waiting more than 15 minutes when transferring.

- Riders living in Seattle / North King County have the shortest wait times when transferring; more than half report waiting 10 minutes or less when transferring.

Figure 26: Wait Time When Riding by Area of Residence
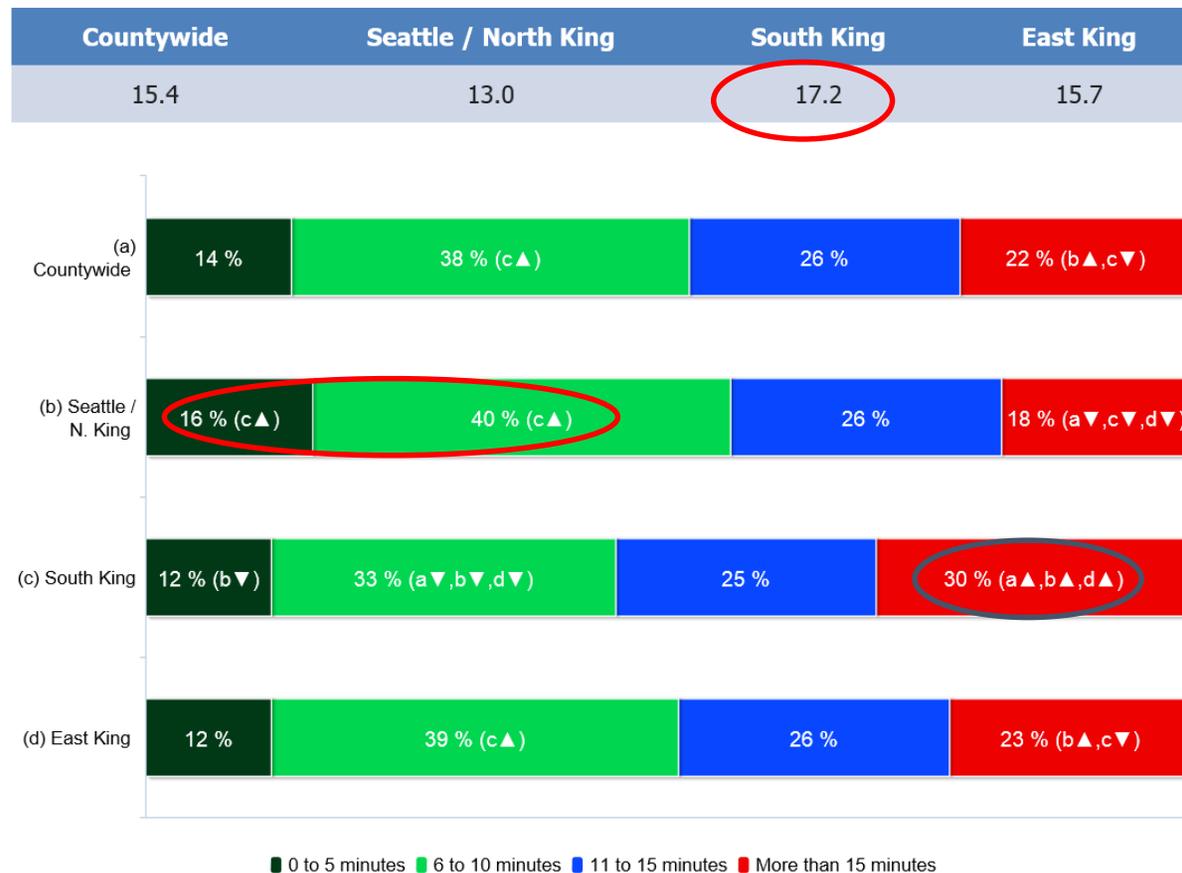
Countywide	Seattle / North King	South King	East King
15.4	13.0	17.2	15.7

(a) Countywide: 14 % | 38 % (c▲) | 26 % | 22 % (b▲,c▼)

(b) Seattle / N. King: 16 % (c▲) | 40 % (c▲) | 26 % | 18 % (a▼,c▼,d▼)

(c) South King: 12 % (b▼) | 33 % (a▼,b▼,d▼) | 25 % | 30 % (a▲,b▲,d▲)

(d) East King: 12 % | 39 % (c▲) | 26 % | 23 % (b▲,c▼)

■ 0 to 5 minutes ■ 6 to 10 minutes ■ 11 to 15 minutes ■ More than 15 minutes

Question: TRIP_5C When you transfer, how long do you usually wait for the bus or streetcar?

Base: Regular and Infrequent Riders who Transfer; Year: 2014

	Countywide	Seattle / North King	South King	East King
n	437	187	145	105
nw	450	148	172	130

▲ / ▼ indicates a statistically significant between respondent groups

Use of Metro in Downtown Seattle

Overall Use

More than half of all Riders say that they frequently get on or off the bus in downtown Seattle.

- Riders living in Seattle / North King County are the most likely to get on or off the bus in downtown Seattle—more than four out of five report doing so frequently or sometimes.

- While the majority of Riders living in South King County frequently or occasionally get on or off the bus in downtown Seattle, more than one out of five South King County Riders never do so.

Figure 27: Frequency of Getting On or Off Bus in Downtown Seattle
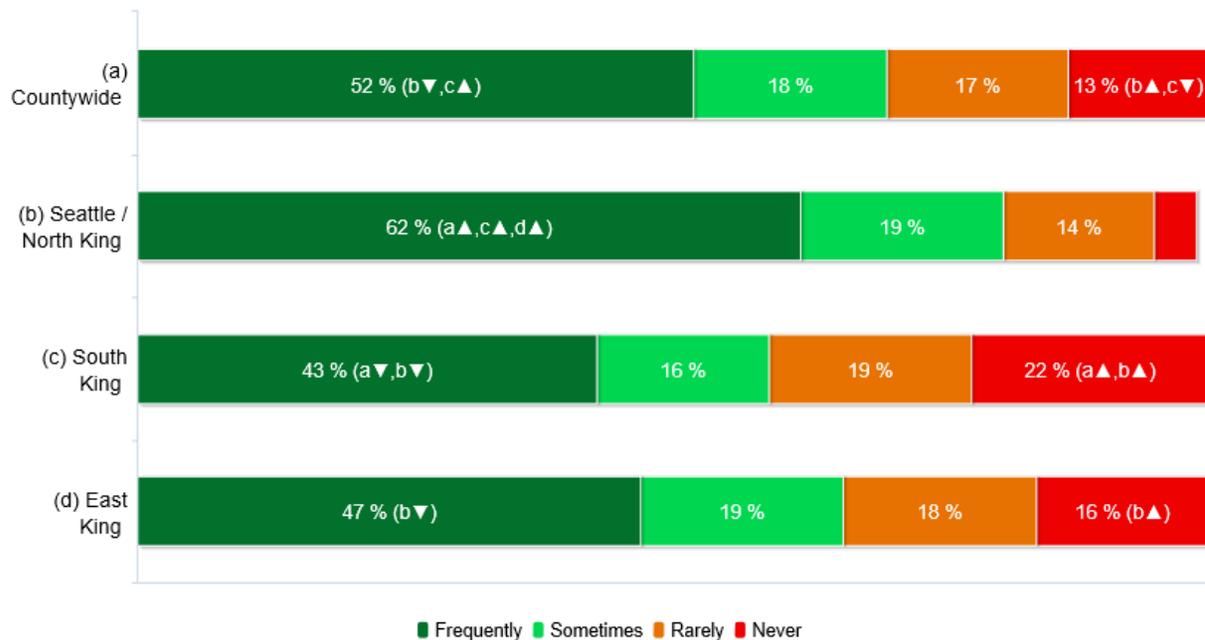
Question: PS1B In the past year, how often have you gotten on or off a bus or streetcar in Downtown Seattle?
Base: Regular and Infrequent Riders

	Countywide	Seattle / North King	South King	East King
n	1,102	540	273	289
n_w	1,161	449	359	353

▲ / ▼ *indicates a statistically significant difference between respondent groups; percentages for small cells (<10%) are not shown*

Transit Tunnel Use

While there has been little variation over the years in the percentage of Riders who frequently or occasionally get on or off the bus or Link in the downtown transit tunnel, the percentage saying they never do so increased significantly in 2014.

Figure 28: Frequency of Getting On or Off Bus or Link Light Rail in Downtown Transit Tunnel

	Frequently	Sometimes	Rarely	Never
2014	21 %	20 %	24 %	36 % (▲)
2013	22 %	22 %	28 %	28 %
2012	22 %	23 %	30 %	26 %

■ Frequently ■ Sometimes ■ Rarely ■ Never
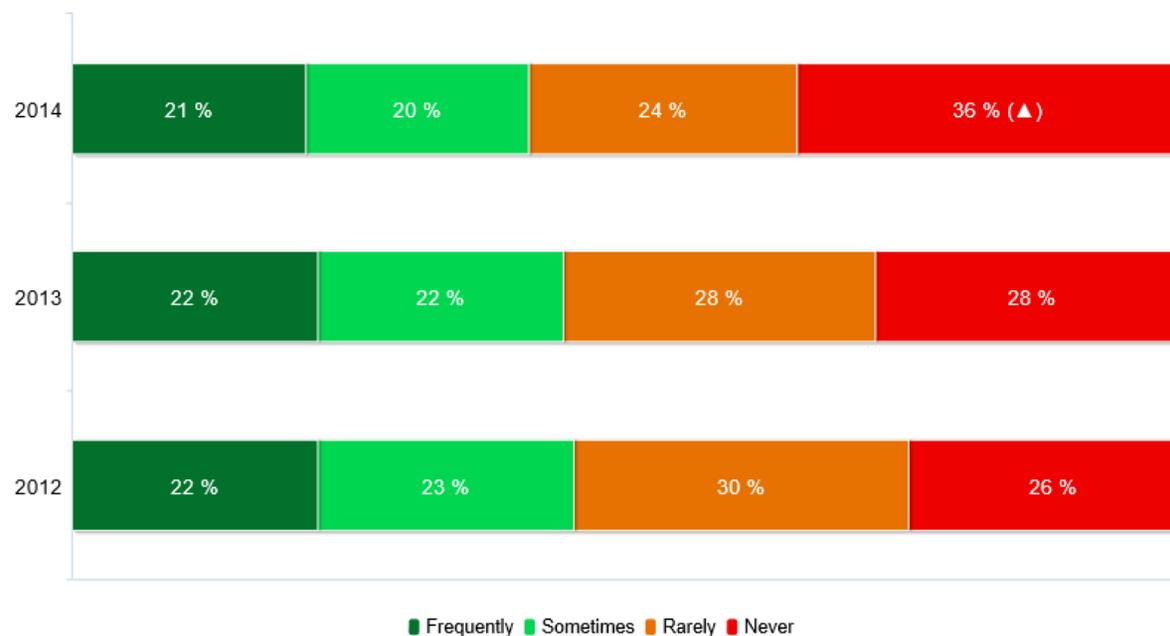
Question: PS1B_ In the past year, how often have you gotten on or off a bus or Link Light Rail in the downtown transit tunnel?
Base: Regular and Infrequent Riders

	2012	2013	2014
n	1,218	1,395	1,102
nw	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant difference between respondent groups

Park-and-Ride Lot Use

Overall Use

After a decrease in park-and-ride lot use in 2012, use has been increasing and is now the highest in five years. Nearly two out of five Riders report using a park-and-ride lot within the past year.

Figure 29: Trends in Park-and-Ride Lot Use
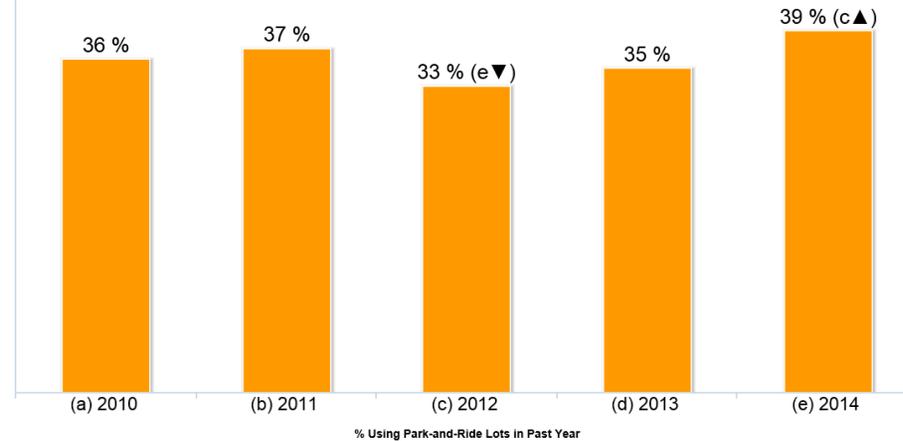
Question: PR1 In the past year, have you used a park-and-ride lot?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
nw	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year or as noted

Within each geographic region, park-and-ride lot use has varied over the years but in most cases is not significantly different year to year.

- Reported park-and-ride lot use continues to be highest among Riders living in East King County. However, use has been decreasing steadily since 2010.
  - Currently just over three out of five East King County Riders use a park-and-ride lot, down from more than three out of four in 2012.

- Reported park-and-ride lot use among Seattle / North King County Riders decreased significantly in 2014.

This decrease in park-and-ride lot use in these two areas is offset by the increase in South King County. South King County is larger (number of households and more riders per household) than East King County and has more riders per household than Seattle / North King County. Seattle / North King County also has the lowest percentage of Riders using park-and-ride lots.

Table 29: Trends in Park-and-Ride Lot Use by Area of Residence

	2010	2011	2012	2013	2014
Countywide	36%	37% (▲)	33% (▼)	35% (▲)	39% (▲)
Seattle / North King	19%	22%	18%	19%	15% (▼)
South King	52%	52%	49%	43%	46%
East King	77%	72%	69%	66%	62%

Question: PR1 In the past year, have you used a park-and-ride lot?
Base: Regular and Infrequent Riders

		2010	2011	2012	2013	2014
Seattle / North King	n	539	547	418	509	540
	n_w	705	421	771	446	449
South King	n	289	450	400	442	273
	n_w	228	151	237	273	359
East King	n	312	458	400	444	289
	n_w	208	121	210	152	353

▲ / ▼ *indicates a statistically significant change from previous year or as noted*

Frequency of Using Park-and-Ride Lots

Among Riders who have used a park-and-ride lot in the past year, there has been no change in the frequency of use.

Riders who have used a park-and-ride lot in the past 30 days average between nine and ten uses. Frequency of using park-and-ride lots increased significantly between 2012 and 2013 and remained unchanged in 2014.

- Usage is highest among South and East King County users.

- The increase in frequency of use countywide noted in 2013 is due primarily to increased frequency among users living in South King County.

Table 30: Frequency of Using Park-and-Ride Lots in Past 30 Days

	2012	2013	2014
0 times	31%	30%	33%
1 to 2 times	31%	25% (▼)	24%
3 to 15 times	23%	27%	26%
16 or more times	15%	18%	18%

Question: PR2B How many times have you used Metro's park-and-ride lots in the last 30 days?
Base: Regular and Infrequent Riders who have used park-and-ride lot in last year

	2012	2013	2014
n	547	588	390
n_w	399	309	451

▲ / ▼ indicates a statistically significant change from previous year

Table 31: Average Number of Times Used Park-and-Ride Lot in Past 30 Days
(Those who Have Used Park-and-Ride Lot in Past 30 Days)

	2012	2013	2014
Countywide	8.0	9.4 (▲)	9.5
Seattle / N. King	8.3	8.1	6.4
South King	7.4	10.3 (▲)	10.7
East King	8.2	9.4	9.6

Base: Regular and Infrequent Riders who have used park-and-ride lot in past 30 days

	2012	2013	2014
n	414	473	348
n_w	275	215	391

▲ / ▼ indicates a statistically significant change from previous year

Personal Travel

The majority of Riders drive alone or with others for their personal travel.

- Nearly one of five Riders use Metro for their personal travel.

Figure 30: Personal Travel Mode(s)

Mode	Percent
Drive Alone	60 %
Carpool	23 %
Bus / Streetcar	19 %
Walk	9 %
Bicycle	5 %
Sound Transit	3 %
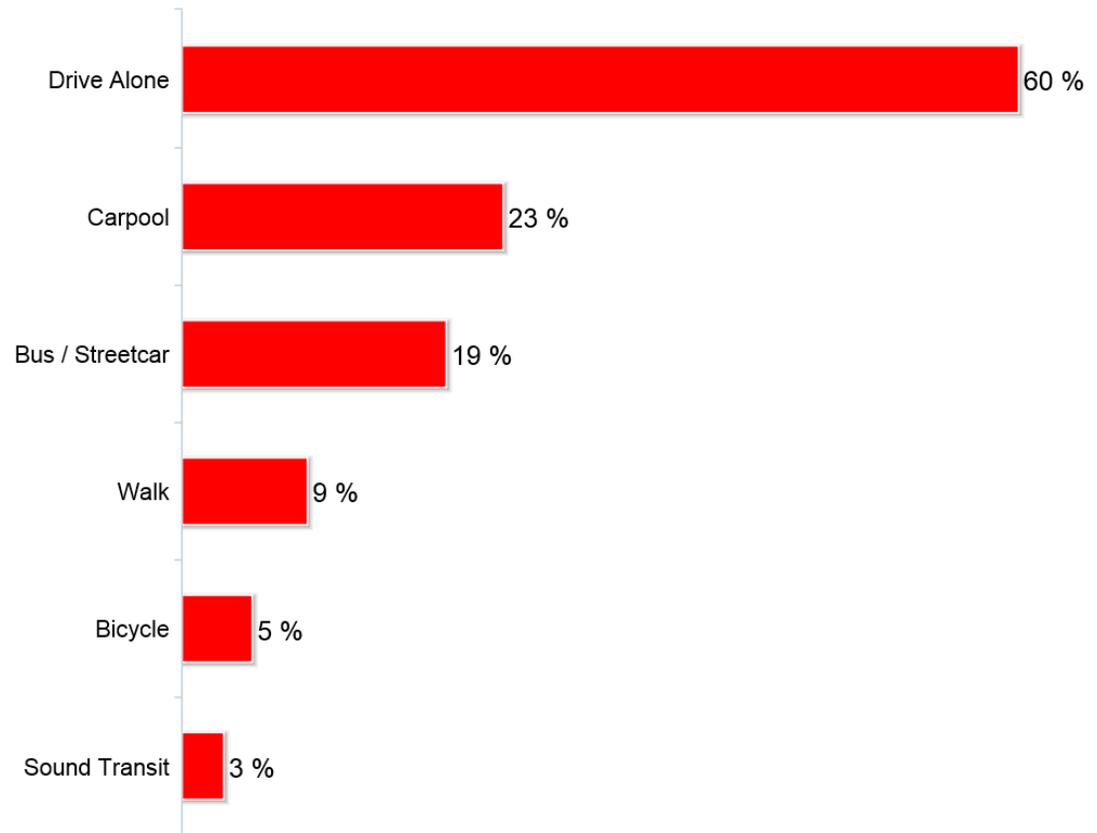
Question: PT1: How do you usually use to get around for most of your personal travel? Sums to more than 100%; multiple responses allowed.
Base: Regular and Infrequent Riders; Year 2014

	2014
n	1,102
n_w	1,161

▲ / ▼ *indicates a statistically significant change differences between respondent groups*

Use of Metro for personal travel is highest among Riders living in South and, to a lesser extent, Seattle / North King County.

- One of four South King County Riders use Metro for their personal travel.

A significant percentage of Seattle / North King County Riders walk or bicycle for their personal travel.

Table 32: Personal Travel Mode by Area of Residence

	(a) Seattle / North King	(b) South King	(c) East King
Drive Alone	55% (c▼)	54% (c▼)	72% (a▲,b▲)
Bus / Streetcar	21% (c▲)	24% (c▲)	11% (a▼,b▼)
Carpool	19% (b▼)	28% (a▲)	22%
Walk	15% (b▲,c▲)	7% (a▼)	5% (a▼)
Bicycle	8% (b▲,c▲)	3% (a▼)	4% (a▼)
Sound Transit	3%	5%	3%

	Countywide	Seattle / North King	South King	East King
n	1,102	540	273	289
n_w	1,161	449	359	353

As would be expected, Frequent Regular Riders are the most likely to use Metro for their personal travel.

- Three out of ten Frequent Regular Riders use Metro for their personal travel.

Table 33: Personal Travel Mode by Frequency of Riding

	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
Drive Alone	51% (d▼)	47% (c▼,d▼)	58% (b▲,d▼)	74% (a▲,b▲,c▲)
Carpool	26% (d▲)	25% (d▲)	27% (d▲)	19% (a▼,b▼,c▼)
Bicycle	4%	3% (c▼,d▼)	7% (b▲)	6% (b▲)
Walk	9%	8%	11%	10%
Bus / Streetcar	27% (c▲,d▲)	31% (c▲,d▲)	18% (a▼,b▼,d▲)	6% (a▼,b▼,c▼)
Sound Transit	4%	5% (d▲)	3%	2% (b▼)

Base: Regular and Infrequent Riders; Year: 2014

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	861	591	266	241
n_w	718	498	218	442

▲ / ▼ indicates a statistically significant difference between respondent groups

FINDINGS: RIDERS' COMMUTE BEHAVIOR

Summary

Topic	What We Found				What It Means
Commute Status	Consistent with the increase in older Riders surveyed, we see an increase in the percentage of riders who are do not commute to work or school—that is, are Non-Commuters. Despite this increase, nearly two out of three Riders commute to work or school. Note that not all riders who are Commuters use Metro for their commute trips.	**2012**	**2013**	**2014**	The percentage of Riders who commute to work (57%) is somewhat lower than the percentage of work commuters in the general population of King County (63%). Therefore, while Metro clearly serves Work Commuters, it is also an important source of travel for those commuting to School and Non-Commuters.
			Commute to Work		
		58%	61%	57%	
			Commute to School		
		12%	10%	9%	
			Non-Commuter		
		30%	29%	35%▲	
		Significant increase (▲) or (▼) from previous year			
Metro Commuters	Nearly three out of five Commuters who are Riders use Metro to get to work or school. Among Regular Riders, this figure jumps to four out of five. This is the highest percentage to date and has been increasing at a significant level since 2012. The increase in Riders' use of Metro to commute to work or school is greatest in Seattle / North and South King County.	**2012**	**2013**	**2014**	Better and more direct service, high parking costs, traffic congestion, and general comfort with using public transportation are likely contributors to increased transit use for commuting among existing riders. Better understanding the motives behind the mode choice decision for commuting could lead to increased use of Metro by Commuters who are Infrequent Riders and Non-Riders.
			ALL Riders		
		53%	55%	58%	
			REGULAR Riders		
		69%	75%▲	80%▲	
		Seattle / North King REGULAR Riders			
		67%	73%	76%▲	
		South King REGULAR Riders			
		76%	82%	86%▲	
		East King REGULAR Riders			
		73%	72%	79%	
		Significant increase (▲) or (▼) from previous year *For subareas, significant increases from baseline (2012)*			

Topic	What We Found		What It Means
Commute Mode by Major Work Location	Nearly half of all Metro Riders who commute work in downtown Seattle or the areas immediately surrounding the downtown core. Use of Metro is similar across the major destinations with the exception of the areas immediately surrounding the downtown Seattle core.	<table><tr><td></td><td>% Commute To</td><td>% Using Metro</td></tr><tr><td>Downtown Seattle</td><td>27%</td><td>78%</td></tr><tr><td>Surrounding DT Seattle</td><td>20%</td><td>59%</td></tr><tr><td>University of Washington</td><td>9%</td><td>77%</td></tr><tr><td>Downtown Bellevue</td><td>4%</td><td>70%</td></tr></table>	While there is service available to the areas surrounding downtown Seattle, in many cases it may require a transfer. This coupled with the availability of parking may be a barrier to transit use.

Commute Status

Respondents are classified as Commuters versus Non-Commuters based on:

- Their overall employment or student status.
- The number of days per week they commute to work or school outside the home.

Commuters are defined as those employed full or part-time or students who commute to a fixed worksite or school at least three days per week by any mode.

Consistent with the increase in older Riders surveyed, we see an increase in the percentage of Riders who do not commute to work or school—that is, are Non-Commuters.

Despite this increase, nearly two out of three Riders work or go to school.

- Among Commuters the mix between Work and School Commuters has remained similar over the years.

Not all Commuters who are Riders use Metro to commute. This is discussed further in the section on Commute Mode.

Figure 31: Commuter Status
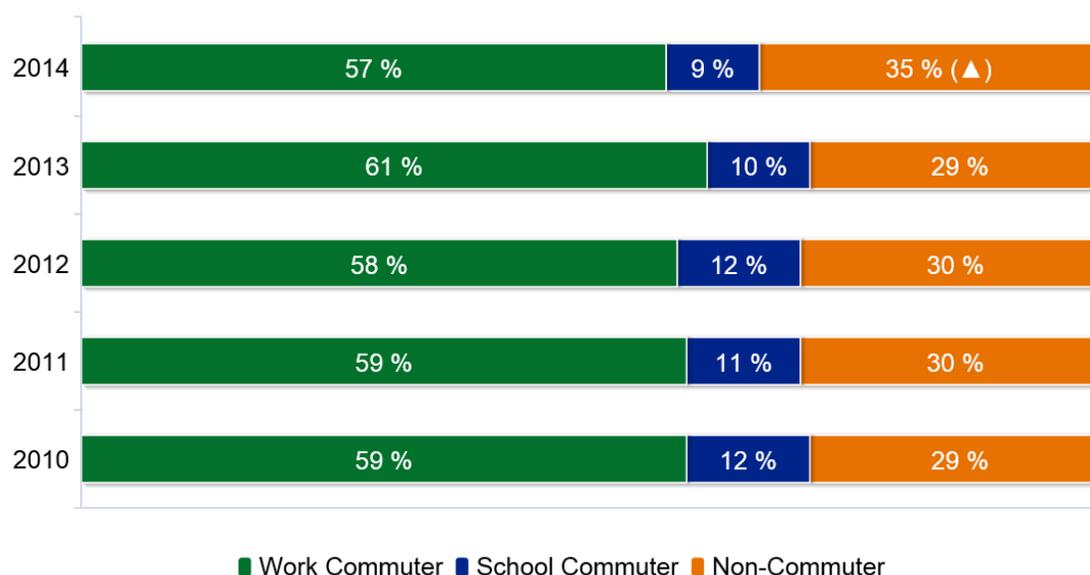
	2010	2011	2012	2013	2014
Work Commuter	84%	84%	83%	86%	87%
School Commuter	16%	16%	17%	14%	13%

Questions: CS1 Are you currently employed / self-employed, a student, a homemaker, retired, currently not employed or something else?
CS2B/3B How many days a week do you travel to work, that is, you work outside your home / attend school?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n_w	1,140	1,455	1,218	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

Work Location

After a significant increase in the percentage of Riders working in the Downtown Seattle core in 2012, there has been little change in the distribution of those working in downtown Seattle, the area surrounding downtown Seattle, and the university community over the past three years.

- There is a significant increase in the percentage of riders reporting that they work in a South King County location in 2014.
- The percentage working in locations in North County outside of downtown Seattle and the University District has been decreasing steadily since 2010.

Table 34: Work Location

	2010	2011	2012	2013	2014
Downtown Seattle Core	31%	19% (▼)	28% (▲)	29%	27%
Surrounding Downtown	14%	27% (▲)	21% (▼)	22%	20%
University	11%	9%	11%	10%	9%
Other North King	15%	12%	10%	8%	5% (▼)
Downtown Bellevue	6%	7%	6%	5%	4%
Other East King	10%	12%	11%	10%	12%
South King	8%	10%	8%	9%	16% (▲)
All Other	2%	2%	3%	5% (▲)	5%

Question: C1   In what geographic area do you work / attend school?
Base: Regular and Infrequent Riders who are Commuters

	2010	2011	2012	2013	2014
n	832	1,028	860	940	746
n_w	798	482	847	627	759

▲ / ▼ indicates a statistically significant change from previous year

Eight out of ten Riders living in Seattle / North King County also work in or around downtown Seattle, the university area, or other areas in North King County.

Only four out of ten riders living in East and South King County work in the same area in which they live.

- A significant percentage of East King County Riders work in the areas surrounding downtown Seattle.

Table 35: Work Location by Area of Residence

	(a) Seattle / N. King	(b) South King	(c) East King
Downtown Seattle Core	33% (b▲,c▲)	25% (a▼)	24% (a▼)
Surrounding Downtown	24% (b▲)	14% (a▼,c▼)	21% (b▲)
University	14% (b▲,c▲)	6% (a▼)	7% (a▼)
Other North King	9% (b▲,c▲)	2% (a▼)	2% (a▼)
Downtown Bellevue	2% (c▼)	2% (c▼)	10% (a▲,b▲)
Other East King	4% (c▼)	5% (c▼)	28% (a▲,b▲)
South King	7% (b▼,c▲)	39% (a▲,c▲)	3% (a▼,b▼)
All Other	4%	5%	5%

Question: C1   In what geographic area do you work **/** *attend school?*
Base: Regular and Infrequent Riders who are Commuters; Year 2014

	Seattle / North King	South King	East King
n	343	187	216
nw	274	237	249

▲ / ▼ *indicates a statistically significant difference between respondent groups*

Metro Commuters

Nearly three out of five Commuters who are Riders use Metro to get to work or school.

- This figure has been increasing steadily each year since 2010.

Figure 32: Commute Mode
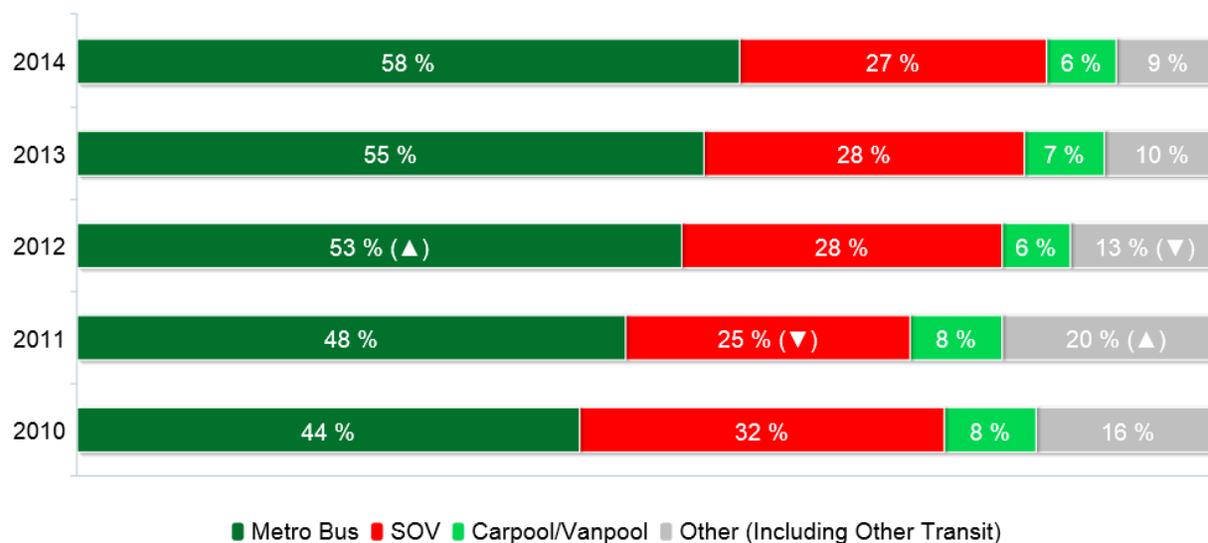
Question: CS2C/ 3C   Of the [RESTORE NUMBER OF DAYS COMMUTE TO WORK OR SCHOOL] days that you travel to work / school, how many days do you take a Metro bus or the South Lake Union Streetcar as part of that commute?
        C4B   You indicated that you do not use Metro to get to school. How do you typically get to school?
Base: Regular and Infrequent Riders who are Commuters

	2010	2011	2012	2013	2014
n	832	1,028	860	940	746
n_w	798	482	847	627	759

▲ / ▼ *indicates a statistically significant change from previous year*

Four out of five Regular Riders commute to work or school on Metro. This is the highest percentage to date and has been increasing at a significant level since 2012.

- Regular Riders' use of Metro to commute to work or school has increased in all areas of the county.

- However, the increase over the years is greatest among Regular Riders living in South King County.

Figure 33: Regular Riders: Commute Mode

Legend: ■ Metro Bus ■ SOV ■ Carpool/Vanpool ▒ Other (Including Other Transit)
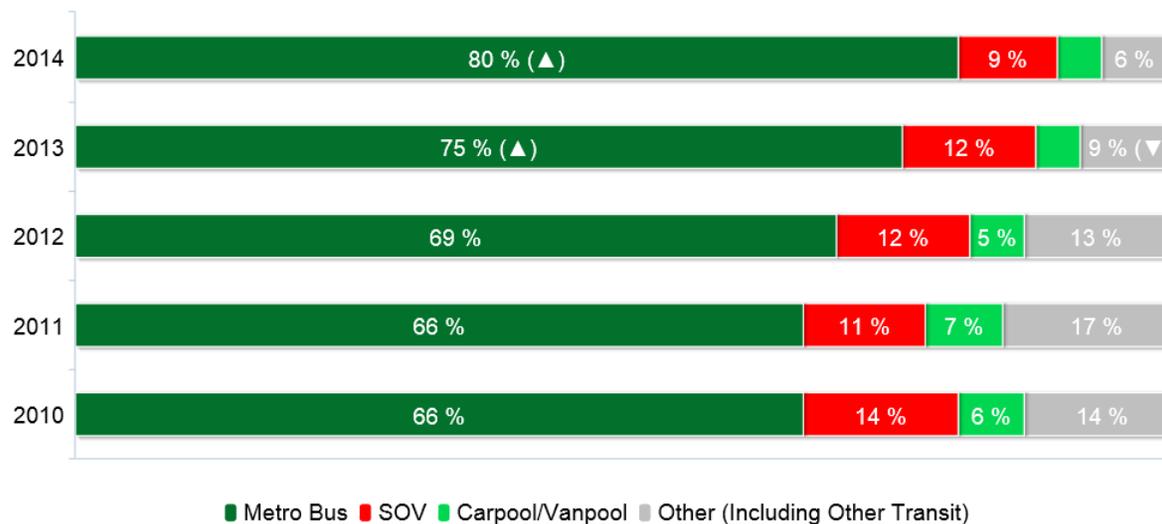
		(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014
Metro Bus	**Seattle / North King**	65% (d▼,e▼)	68%	67% (e▼)	73% (a▲)	76% (a▲,c▲)
	South King	67% (d▼,e▼)	66% (d▼,e▼)	76% (e▼)	82% (a▲,b▲)	86% (a▲,b▲,c▲)
	East King	70%	59% (e▼)	73%	72%	79% (b▲)

Base: Regular Riders who are Commuters

	2010	2011	2012	2013	2014
n	*651*	*903*	*638*	*845*	*619*
n$_w$	*506*	*328*	*583*	*440*	*521*

▲ / ▼ indicates a statistically significant change from previous year

Two out of three Infrequent Riders drive alone when commuting to work or school.

- The extent to which Infrequent Riders drive alone to work or school has been increasing and is up significantly from 2011.

- This increase over the years is greatest in South King County.

- The extent to which Infrequent Riders drive alone to work or school has varied widely over the years. This is due in part to small base sizes.

Figure 34: Infrequent Riders: Commute Mode

	Metro Bus	SOV	Carpool/Vanpool	Other (Including Other Transit)
2014	8 %	67 %	9 % (▼)	15 %
2013	9 % (▼)	63 %	15 % (▲)	13 %
2012	16 % (▲)	63 %	9 %	12 % (▼)
2011	8 %	55 %	11 %	26 %
2010	7 %	62 %	11 %	20 %
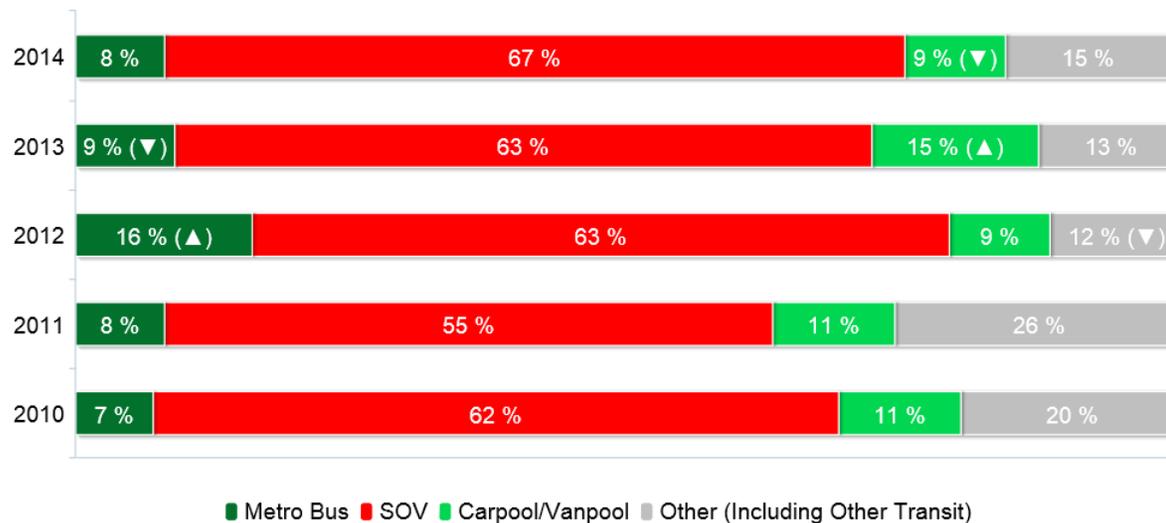
		(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014
SOV	Seattle / N. King	58%	49% (c▼,d▼,e▼)	63% (b▲)	68% (b▲)	64% (b▲)
	South King	64%	73%	53% (e▼)	64%	76% (c▲)
	East King	72% (d▲)	57%	71% (d▲)	49% (a▼,c▼)	62%

Base: Infrequent Riders Who Are Commuters

	2010	2011	2012	2013	2014
n	181	125	222	95	127
n_w	291	154	265	187	240

▲ / ▼ indicates a statistically significant change from previous year

Nearly four out of five Commuters who are Metro Riders and work in the downtown Seattle core use Metro to get to work or school.

- Those commuting to downtown Seattle from their homes in South and East King County are the most likely to use Metro.

Three out of five Commuters who are Metro Riders and who work in the area surrounding downtown Seattle use Metro to get to work or school.

Table 36: Work Location and Area of Residence for Metro Bus Commuters

		(a) Downtown Seattle Core	(b) Surrounding Downtown **	(c) University **
Metro Bus	**Countywide**	77% (b▲)	59% (a▼)	72%
	Seattle / North King	70% (b▲)	55% (a▼)	61%
	South King **	84% (b▲)	-	-
	East King **	81% (b▲)	61% (a▼)	-

Base: Regular and Infrequent Riders who are Commuters; Year: 2014

	DT Seattle	Surrounding DT Seattle	University
n	233	155	80
n$_w$	207	150	68

▲ / ▼ indicates a statistically significant difference between respondent groups
*** Cells with small base sizes (n <35) are hidden*

Reasons given for driving alone instead of using Metro fall into three broad categories.

- The most common reasons are travel time and lack of service to where they work or go to school.
- The second set of reasons includes their trip would require a transfer and needing a car at work or on the way to or from work.
- The third set of reasons centers around convenience and/or no need (free parking or walking distance).

While sample sizes are small,

- Riders who are drive-alone commuters to downtown Seattle are more likely to say that there is no service available.
- While the sample size is small, Riders driving alone to the areas immediately surrounding downtown Seattle are more likely to say that the reason they drive is that their trip would require a transfer.
- Riders working in downtown Bellevue area more likely to say that the reason they drive is because they need their car.

Figure 35: Reasons for Driving Alone Instead of Using Metro

	Travel Time Too Long	34 %
Reason	No Service Available	32 %
	Would Need to Transfer	13 %
	Need Car at Work / Pick up Kids / Errands	13 %
	Free Parking Where I Work	6 %
	Inconvenient	6 %
	Not Practical / Work Hours / Work Location	6 %
	No Need / Walking Distance	6 %
	Safety Concerns / Work at Night	3 %
	Costs Too Much	2 %
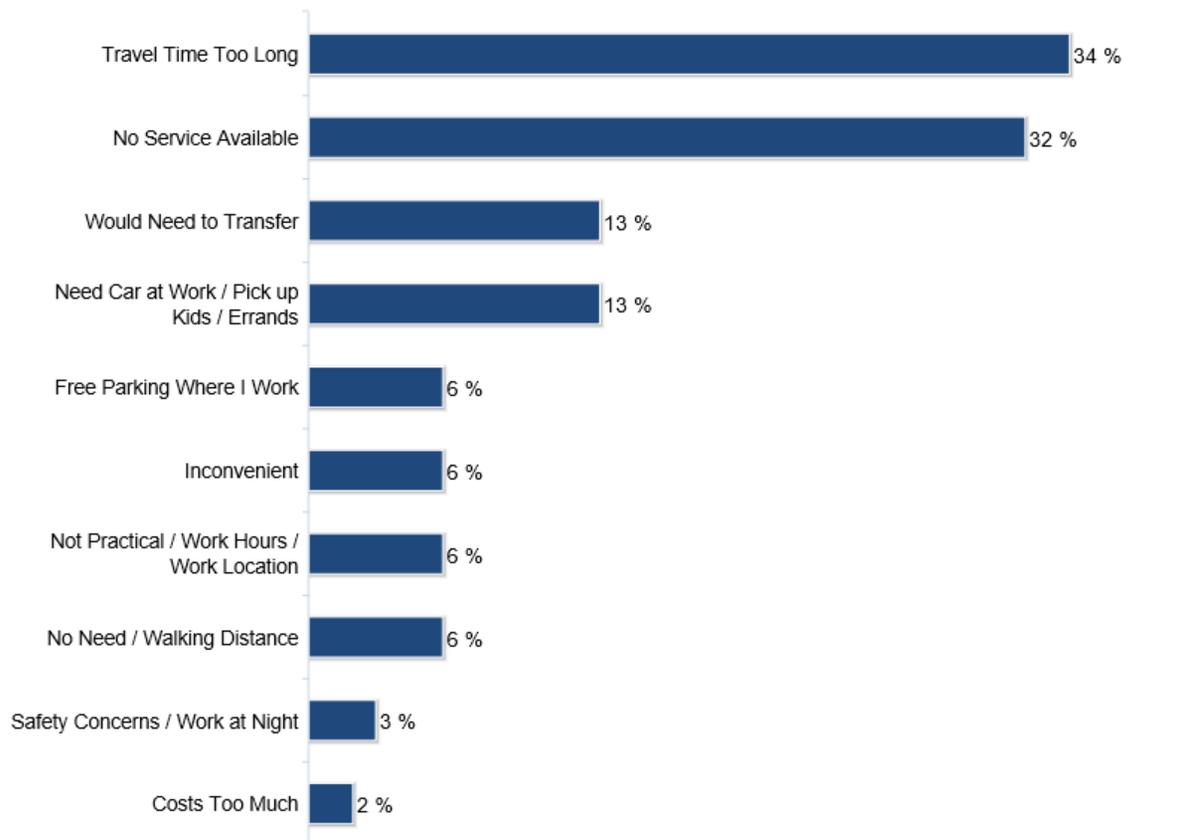
Question: C4C Why do you drive alone instead of using Metro?
Base: Regular and Infrequent Riders who are Commuters and drive alone to work; Year: 2014

	2014
n	117
nw	179

FINDINGS: FARE PAYMENT

Summary

Topic	What We Found		What It Means
Fare Payment Method	ORCA Cards are used by more than three out of five Riders. Overall use of ORCA Cards increased by 2 percentage points in 2014. Use of cash to pay fares increased significantly between 2012 and 2013 and remained unchanged in 2014. Reflecting the higher percentage of older riders surveyed in 2014, the percentage of Riders using a Reduced Regional Fare Permit (RRFP) increased significantly. More than four out of five (84%) riders using an RRFP have the permit loaded on an ORCA Card, up from 72% in 2013.		As noted over the past several years, ORCA Cards have likely hit close to maximum adoption rates without new, value-added features. The very small growth in ORCA Card use between 2013 and 2014 is in part attributable to increased adoption among older Riders with their RRFP on an ORCA Card as well as increased adoption among Frequent Regular Riders. Moving Infrequent Riders from cash to some form of cashless payment system is likely to be difficult without some form of incentive. While more older Riders were surveyed in 2014, these Riders may be recently retired and already had an ORCA Card.

2012	2013	2014
ORCA (Includes Adult, Youth, U-PASS and RRFP on ORCA)		
66%	66%	68%
CASH / TICKETS		
22%	28%▲	27%
RRFP (Includes RRFP On and Not On ORCA Card)		
14%	12%	16%▲

Significant increase (▲) or (▼) from previous year

Topic	What We Found		What It Means

Products on ORCA Card

The majority of ORCA users have an E-Purse on their card. The percentage of ORCA users with an E-Purse increased significantly in 2014. (Eight percent have a pass on their ORCA Card as well, up from just 3% in 2013).

The percentage of ORCA users with a pass on their card has remained virtually unchanged for the past two years.

	2013	2014
TOTAL PASS	38%	36%
TOTAL E-PURSE	41%	52%▲
E-PURSE ONLY	38%	45%▲
PASS OHLY	35%	28%▼
PASS AND E-PURSE	3%	8%▲

Significant increase (▲) or (▼) from previous year

ORCA users are increasingly likely to have an E-Purse on their ORCA Cards, either by itself or in combination with a pass.

This would suggest that ORCA Card users pay close attention to cost of a pass versus simply having an E-Purse and choose an E-Purse if their riding frequency does not warrant a pass. Having an E-Purse also allows for occasional use on other agencies / modes such as Sound Transit or Washington State Ferries or to pay for a companion's fare.

ORCA Card users who have a pass on their card may be more likely to supplement the lowest cost pass to support their typical trip and pay with an E-Purse for other trips with a higher fare rather than purchase a higher cost pass and not use the full value.

Subsidies

The extent to which Riders state their employer or school subsidizes passes and/or E-Purses has been decreasing since 2010, when nearly three out of four (73%) riders received a subsidy.

2012	2013	2014
RECEIVE SUBSIDY		
59%	54%	52%

Significant increase (▲) or (▼) from previous year

Instead of offering subsidies, employers may be encouraging employees to elect to place tax-free dollars into their flexible spending accounts (FSAs) or transportation spending accounts (TSA) to pay for the transportation benefits (e.g., transit passes, vanpool costs, parking, etc.).

ORCA Cards and Cash

More than two out of three Riders use an ORCA Card to pay their fare.

- While the percentage of Riders using ORCA continues to increase, rate of growth has slowed. Growth was significant at 9 percentage points between 2010 and 2011 but slowed between 2011 and 2012.

- ORCA use increased again in 2014 by 2 percentage points.

More than one out of four Riders continue to use cash when riding.

- The percentage using cash dropped significantly between 2010 and 2012 but increased in 2013 and remained unchanged in 2014.

Figure 36: Use of ORCA Cards and Cash to Pay Fares

	2014	Cash/Tickets 27 %	Total ORCA* 68 %
	2013	28 % (▲)	66 %
	2012	22 % (▼)	66 % (▲)
	2011	28 % (▼)	60 % (▲)
	2010	35 %	52 %

■ Cash/Tickets ■ Total ORCA*
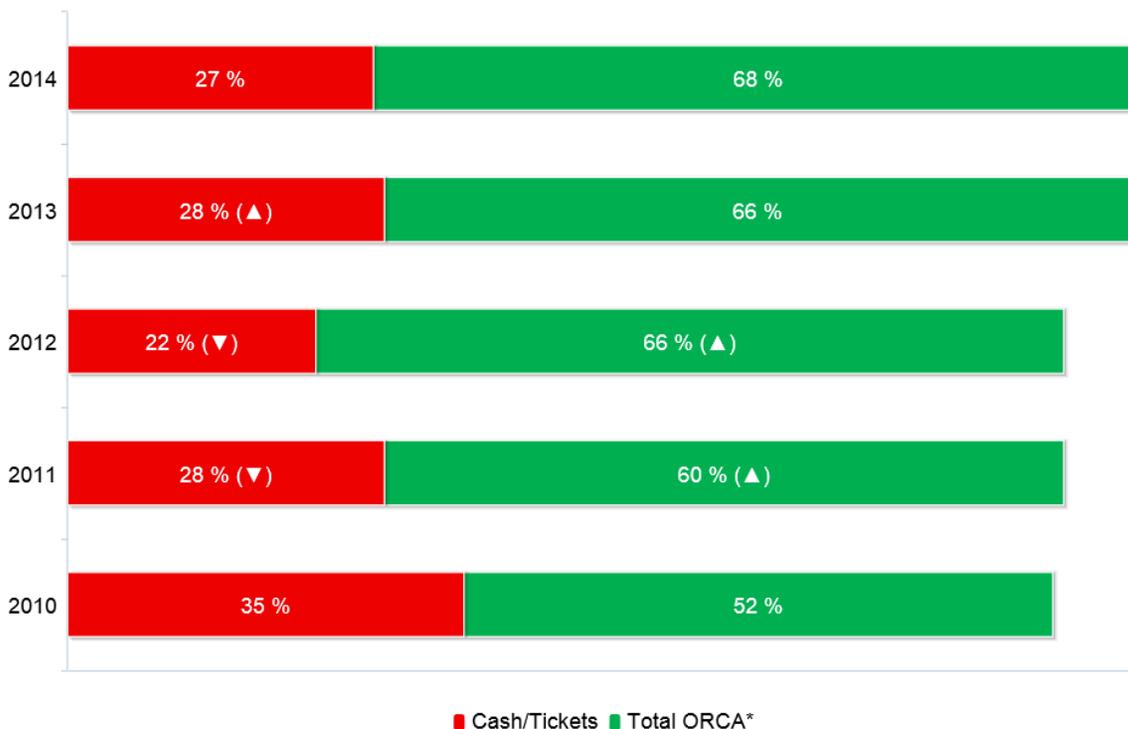
Questions: F0   How do you usually pay your bus fare?
Bars do not sum to 100%; RRFP not on an ORCA and U-PASS are not shown
* Includes ORCA Cards (Adult & Youth Fares), RRFP loaded on ORCA, and U-PASS
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n_w	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

While the increase in overall use of ORCA Cards was small in 2014, ORCA use increased significantly in 2014 among Regular Riders, notably among Frequent Regular Riders.

- More than four out of five Frequent Regular Riders now use an ORCA Card.

Infrequent Riders are the least likely to have an ORCA Card.

- Infrequent Riders' use of ORCA Cards increased significantly between 2010 and 2011. While use has varied since then, Infrequent Riders' ORCA Card use has not changed significantly.

Table 37: Use of ORCA Cards and Cash to Pay Fares by Frequency of Riding

		2010	2011	2012	2013	2014
REGULAR Riders	Total ORCA*	68%	68%	75% (▲)	74%	79% (▲)
	Cash/Tickets	19%	21%	15% (▼)	21% (▲)	17% (▼)
Frequent Regular Riders	Total ORCA*	76%	74%	79% (▲)	79%	84% (▲)
	Cash/Tickets	13%	16%	12% (▼)	17% (▲)	12% (▼)
Moderate Regular Riders	Total ORCA*	51%	54%	65% (▲)	64%	68%
	Cash/Tickets	34%	32%	22% (▼)	30% (▲)	28%
INFREQUENT Riders	Total ORCA*	30%	48% (▲)	52%	54%	50%
	Cash/Tickets	56%	40% (▼)	36%	39%	43%

Questions: F0 How do you usually pay your bus fare?
Includes ORCA Cards (Adult & Youth Fares), RRFP loaded on ORCA, and U-PASS
Base: Regular and Infrequent Riders
▲ / ▼ *indicates a statistically significant change from previous year*

Plotting use of ORCA Cards versus cash suggests that the point at which more Riders are using an ORCA Card than cash is between five and seven one-way rides per month.

Figure 37: Fare Payment (ORCA versus Cash) by Number of Rides in Last 30 Days
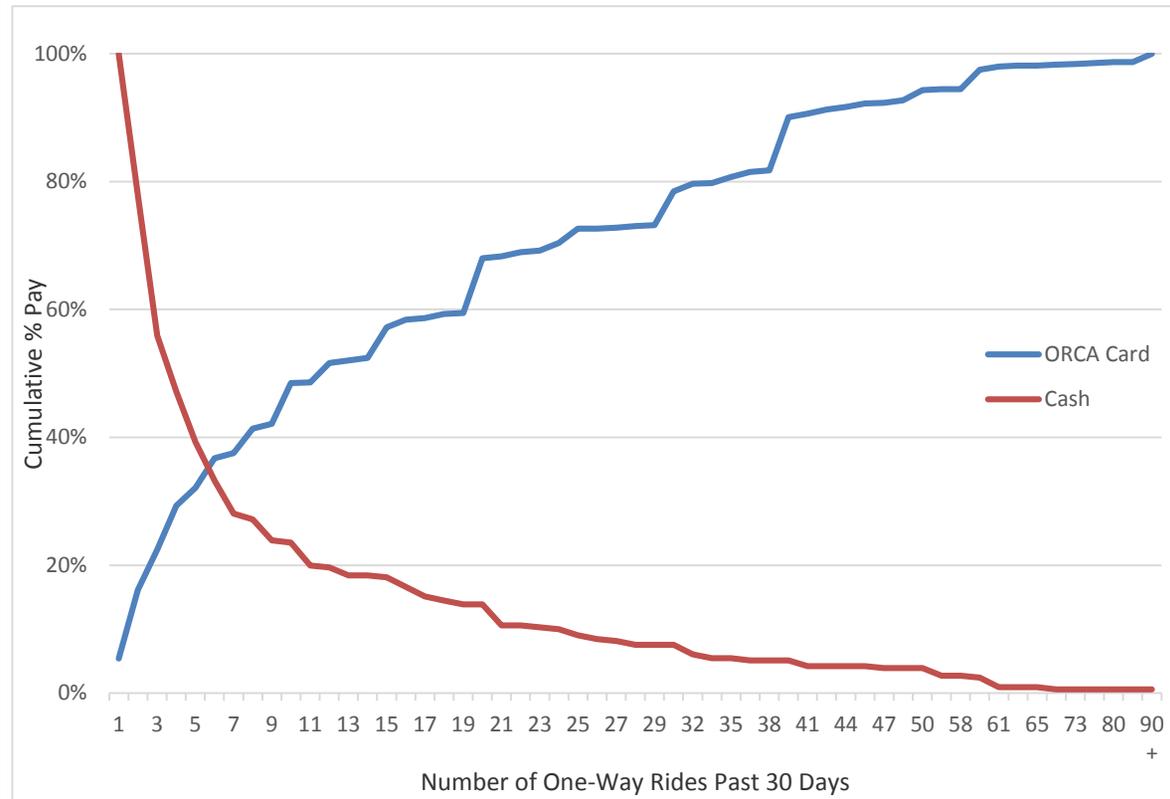
The extent to which Low-Income Riders paid cash fares decreased between 2010 and 2012 but then increased significantly in 2013 and remained unchanged in 2014.

- Currently nearly two out of five Low-Income Riders pay with cash.

The extent to which Low-Income Riders use an ORCA Card increased significantly between 2010 and 2011.

- Since 2012 approximately half of all Low-Income Riders use an ORCA Card.

Table 38: Use of ORCA Cards and Cash to Pay Fares by Income

		2010	2011	2012	2013	2014
Less than $35,000	**Cash/Tickets**	42%	35%	24% (▼)	36% (▲)	37%
	Total ORCA*	40%	53% (▲)	60%	56%	55%
$35,000 or more	**Cash/Tickets**	34%	25% (▼)	22%	25%	23%
	Total ORCA*	53%	63% (▲)	69% (▲)	70%	73%

Questions: F0   How do you usually pay your bus fare?
Base: Regular and Infrequent Riders

		2010	2011	2012	2013	2014
< $35,000	n	191	345	283	386	249
	n_w	189	172	307	209	257
$35,000 +	n	770	894	752	811	764
	n_w	778	443	736	568	811

▲ / ▼ *indicates a statistically significant change from previous year*

The point at which more Riders use an ORCA Card than cash occurs at incomes between $55,000 and $75,000.

Figure 38: Fare Payment (ORCA versus Cash) by Income
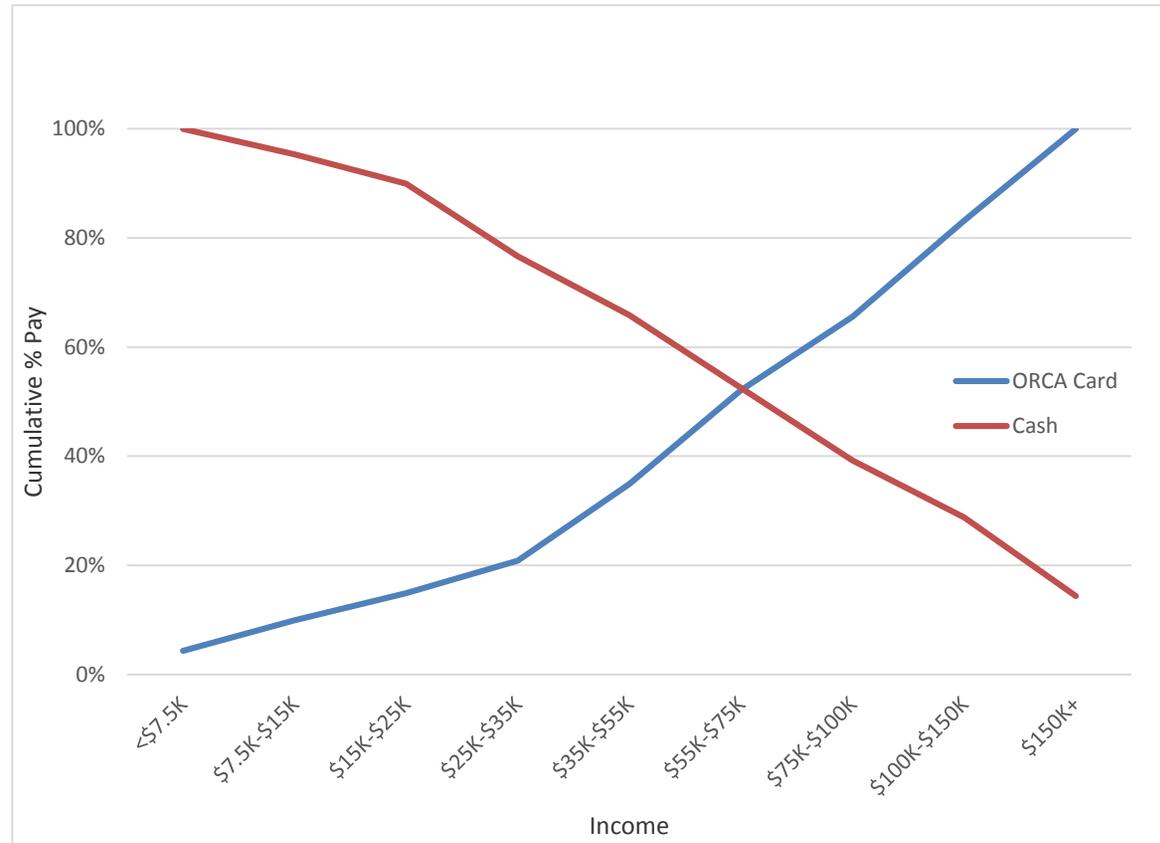
Products on ORCA Cards

The percentage of ORCA Card users with an E-Purse on their card increased significantly in 2014.

- More than half of all ORCA Card users have an E-Purse on their card.

The percentage of ORCA Card users with a pass on their card has remained nearly the same.

However, there has been a significant increase in the percentage with both a pass and an E-Purse.

Figure 39: Products on ORCA Card
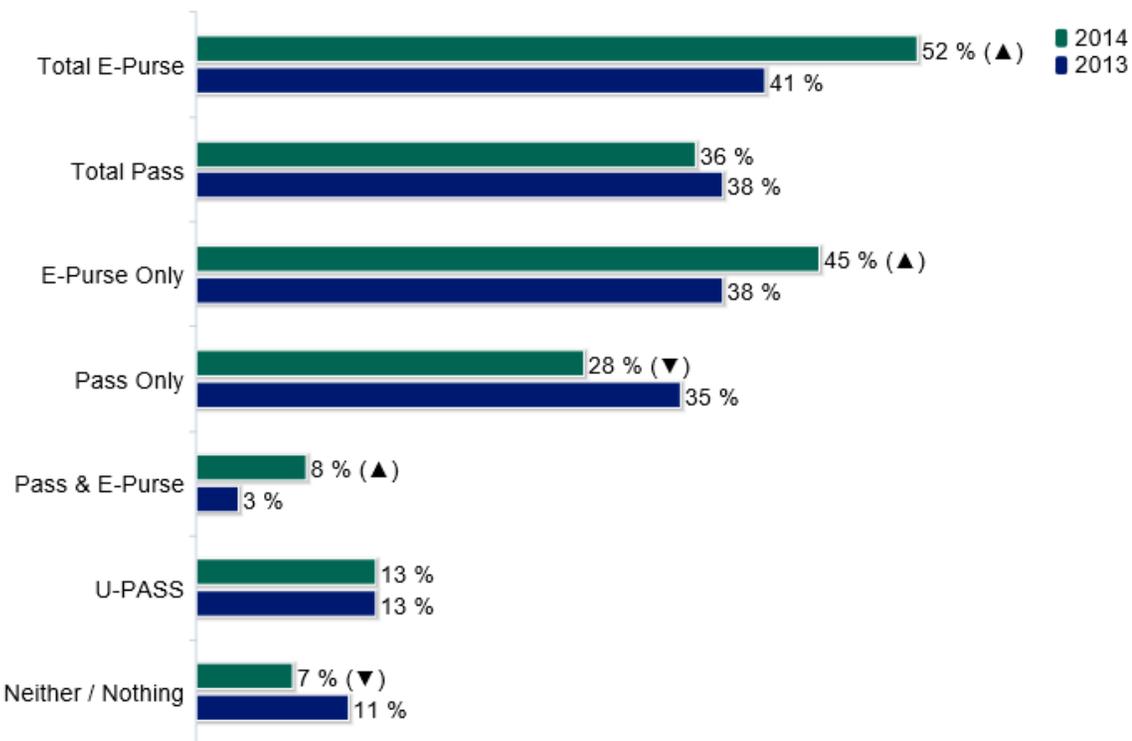
Questions: F1D Do you have a pass or an E-Purse on your ORCA Card?
Base: Regular and Infrequent Riders who pay fare with Adult or Youth ORCA Card or U-PASS

	2013	2014
n	730	596
n$_w$	455	580

▲ / ▼ indicates a statistically significant change from previous year

Regular Riders, notably Frequent Regular Riders, are equally likely to have a pass and/or an E-Purse on their ORCA Card.

Infrequent Riders and, to a lesser extent, Moderate Regular Riders are more likely to have an E-Purse rather than a pass on their card.

Figure 40: Products on ORCA Card by Frequency of Riding

Legend: ■ Total E-Purse ■ Total Pass ■ U-PASS

(a) REGULAR Riders
- 46 % (d▼)
- 39 % (d▲)
- 15 % (d▲)

(b) Frequent Regular Riders
- 43 % (c▼,d▼)
- 42 % (d▲)
- 16 % (d▲)

(c) Moderate Regular Riders
- 56 % (b▲,d▼)
- 32 %
- 13 %

(d) INFREQUENT Riders
- 69 % (a▲,b▲,c▲)
- 25 % (a▼,b▼)
- 7 % (a▼,b▼)
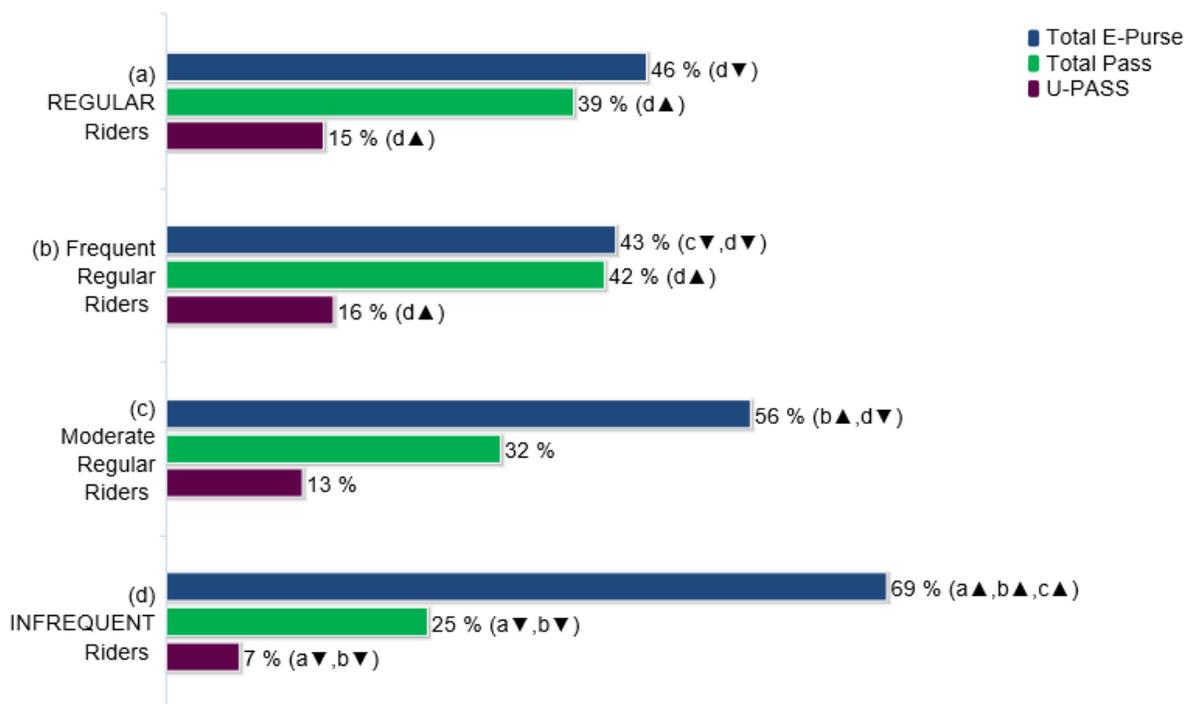
Base: Regular and Infrequent Riders who pay fare with an Adult or Youth ORCA Card or U-PASS; Year: 2014

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	506	386	120	158
n_w	422	324	98	89

Employer / School Subsidies

The extent to which Riders state that their employers or schools subsidize passes and/or E-Purses has been decreasing since 2010.

- The rate of this decline has been slowing.

Figure 41: Employer / School Subsidies

Legend:
- Receive a Full or Partial Subsidy
- Do Not Receive a Subsidy

Receive a Full or Partial Subsidy: 73 %, 66 % (▼), 59 %, 54 %, 52 %

Do Not Receive a Subsidy: 27 %, 34 % (▲), 41 %, 46 %, 48 %

2010   2011   2012   2013   2014
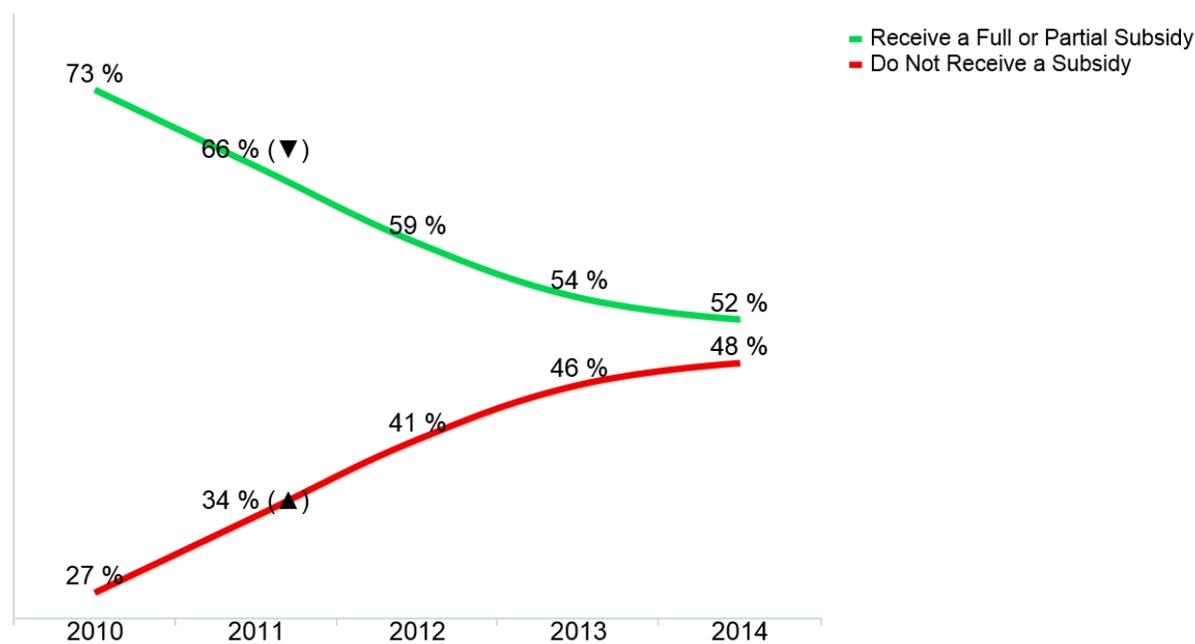
Questions: F3A Does your employer or school pay for part or all of your ORCA pass or E-purse?
Base: Regular and Infrequent Riders who have a pass or E-Purse on their ORCA Card or have a U-PASS

	2010	2011	2012	2013	2014
n	531	544	573	551	686
n_w	473	238	564	344	665

▲ / ▼ indicates a statistically significant change from previous year

Among Metro Commuters, the percentage who say they receive a subsidy decreased significantly between 2010 and 2011 but has held relatively steady since then.

Table 39: Employer / School Subsidies Among Riders Who Commute on Metro

		2010	2011	2012	2013	2014
Metro Bus	**Receive a Full or Partial Subsidy**	77%	66% (▼)	69%	66%	66%
	Do Not Receive a Subsidy	23%	34% (▲)	31%	34%	34%

Base: Regular and Infrequent Riders who have a pass or E-Purse on their ORCA Card or have a U-PASS and commute via Metro

	2010	2011	2012	2013	2014
n	336	356	304	364	308
nw	268	138	269	184	266

▲ / ▼ *indicates a statistically significant change from previous year*

Why Riders Continue to Pay With Cash

The most common reason given for continuing to pay cash is the Rder doesn't ride often enough.

- As expected, this is far and away the most common reason cited by Infrequent Riders.

The second most common reason is that it is easier to use cash.

- Regular Riders are more likely than Infrequent Riders to give this as the reason they pay cash.

Figure 42: Reasons Why Riders Continue to Pay with Cash by Frequency of Riding

	ALL Riders	REGULAR Riders	INFREQUENT Riders
Don't Ride Often Enough	59%	30%	77%
Easier to Pay with Cash/Tickets	24%	32%	18%
Can't Afford / Don't Want to Pay $5 Fee for Card	11%	13%	9%
Haven't Got Around To It/ No Time	5%	9%	3%
Not Enough Locations to Load a Pass / Add Value E-Purse	4%	4%	4%
Don't Know About / Haven't Looked Into It	4%	5%	3%
Concerns about Security / Identity Theft	4%	5%	3%
Don't Have a Debit orr Credit Card	3%	5%	1%
Concerns about Losing Card	2%	3%	1%
Receive Tickets from Social Service Agency / School / Work	1%	1%	1%

Base: Regular and Infrequent Riders who pay cash fares; Year: 2014

	Total Riders	Regular Riders	Infrequent Riders
n	243	143	1100
n_w	313	121	192

Both Low- and Higher-Income Riders say that the primary reasons they continue to use cash is that they don't ride often enough and it is easier.

Low-Income Riders are more likely than Higher-Income Riders to say that they use cash because:

- They can't afford or don't want to pay the $5.00 fee to purchase a card.
- They don't have a debit or credit card to load a pass or add value to an E-Purse.

Figure 43: Reasons Why Riders Continue to Pay with Cash by Income

	Less than $35,000	$35,000 or more
Don't Ride Often Enough	50%	62%
Easier to Pay with Cash/Tickets	35%	19%
Can't Afford / Don't Want to Pay $5 Fee for Card	19%	8%
Haven't Got Around To It/ No Time	8%	4%
Concerns about Security / Identity Theft	6%	3%
Don't Know About / Haven't Looked Into It	6%	4%
Don't Have a Debit orr Credit Card	6%	1%
Concerns about Losing Card	4%	1%

Questions: F4A You indicated that you use cash or tickets to pay your fare. Why do you prefer to use **cash / tickets** as opposed to an ORCA Card?
Base: Regular and Infrequent Riders who pay cash fares; Year: 2014

	Less than $35,000	$35,000 or More
n	249	764
n_w	257	811

Reduced Regional Fare Permits

Reflecting the increase in Older riders surveyed in 2014, use of Reduced Regional Fare Permits (RRFPs) increased significantly between 2010 and 2012 and again between 2013 and 2014.

- Among those using a RRFP, the percentage with an RRFP on an ORCA Card increased significantly between 2010 and 2011.

- This percentage showed no significant change from 2011 to 2013 but increased significantly again in 2014.

Figure 44: Fare Payment: Reduced Regional Fare Permits
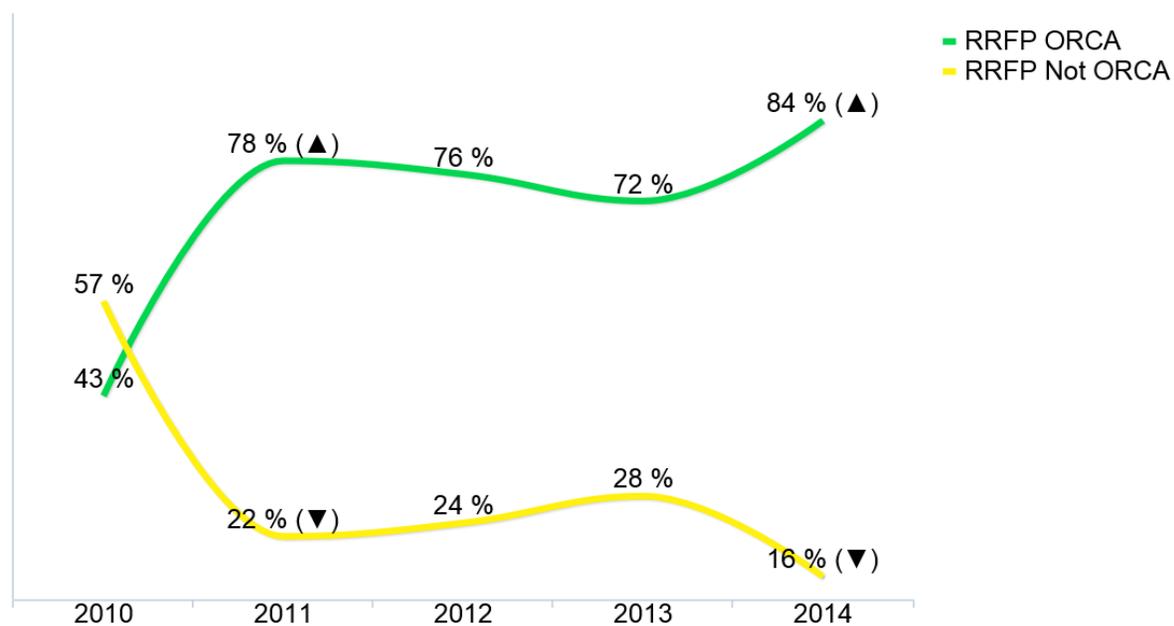
Fare Payment	RRFP	2010	2011	2012	2013	2014
		8%	11% (▲)	14% (▲)	12%	16% (▲)

RRFP ORCA
RRFP Not ORCA

84 % (▲)
78 % (▲)
76 %
72 %
57 %
43 %
22 % (▼)
24 %
28 %
16 % (▼)

2010   2011   2012   2013   2014

Questions: F0 How do you usually pay your bus fare?
Base: Regular and Infrequent Riders

		2010	2011	2012	2013	2014
Riders	n	1,140	1,455	1,218	1,395	1,102
	nw	1,140	1,455	1,218	1,395	1,161
Pay with	n	82	184	165	245	182
RRFP	nw	89	79	173	119	181

▲ / ▼ indicates a statistically significant change from previous year

Demographic Characteristics of Riders Using Different Fare Payment Media

As would be expected, there are clear demographic differences between those using different fare payment media.

Cash

Income clearly distinguishes cash payers from those using an Adult or Youth ORCA Card.

- More than one out of three cash payers have household incomes below $35,000.

Those continuing to use cash are older than those using an Adult or Youth ORCA Card.

- More than two out of five cash payers are 55 and older.

ORCA Card (excluding RRFP on ORCA Cards)

Employment status differentiates those paying with an Adult or Youth ORCA from cash payers.

- Four out of five ORCA Card users are employed.
- Consistent with high employment levels, two out of five ORCA Card users have household incomes of $100,000 or greater.
- More than two-thirds are between the ages of 18 and 54.

RRFP

Consistent with guidelines, RRFP payers are a distinct segment.

- Seventy-one percent (71%) are 65 years of age and older.
- The majority are retired (62%) or disabled (13%).

Those paying with an RRFP are the least affluent rider segment.

- Nearly half have household incomes below $35,000.

A significant percentage do not have a driver's license and/or access to a vehicle.

Table 40: Demographics: Fare Payment Media

	CASH (n=243; n_w=312)	ORCA (n=573; n_w=565)	RRFP (n=182; n_w=181)
GENDER			
MALE	48%	47%	48%
FEMALE	52%	53%	52%
AGE			
16–34	25%▲	30%▲	4%▼
35–54	32%▲	42%▲	12%▼
55 PLUS	43%▲▼	29%▼	85%▲
MEAN	48.8▲▼	43.7▼▼	66.3▲▲
EMPLOYMENT STATUS*			
EMPLOYED	62%▼▲	80%▲▲	19%▼▼
STUDENT	10%▲	10%▲	3%▼
RETIRED	17%▲▼	4%▼	62%▲
DISABLED	7%▲▼	1%▼	13%▲
OTHER	16%	11%▼	12%
INCOME			
<$35K	35%▲▼	15%▼	48%▼▲
$35K–$55K	13%	14%	18%
$55K–$75K	13%	18%	13%
$75K–$100K	10%	14%	9%
$100K PLUS	28%▼▲	40%▲	12%▼
MEDIAN	$58,784▼▲	$80,857▲	$38,241▼
HH COMP (16+ YRS OF AGE)			
SINGLE-PERSON	29%▲▼	19%▼▼	44%▲▲
MULTIPERSON	71%▼▲	81%▲▲	56%▼▼
RACE/ETHNICITY*			
HISPANIC	9%▲▲	5%▼	3%▼
CAUCASIAN	74%▼	75%▼	84%▲
ASIAN	8%▲	12%▲▲	5%▼
BLACK	5%▲	6%▲	1%▼
OTHER	3%	3%	4%
VEHICLE ACCESS			
% W/ LICENSE	82%▲	86%▲	75%▼
% W/ VEHICLES	90%▲	92%▲	72%▼
MEAN # VEHICLES	1.82	1.78	1.22

Base: Regular and Infrequent Riders; Year: 2014
▲ / ▼ indicates a statistically significant difference between respondent group
* Columns sum to more than 100%; multiple responses allowed

FINDINGS: SOURCES OF INFORMATION ABOUT METRO

Summary

Topic	What We Found		What It Means
Information Sources	Riders use multiple sources to get information about Metro. Online sources are the most frequently used source of information. • Two out of three Riders use Metro Online and/or the Regional Trip Planner. • Just over half of all Riders use a smartphone to get information about Metro; this figure jumps to three out of four among smartphone owners. Riders also rely heavily on information posted at stops, transit centers, and park-and-ride lots. Just over half of all riders continue to use printed timetables.	**% OF RIDERS WHO FREQUENTLY / SOMETIMES USE** METRO ONLINE AND/OR REGIONAL TRIP PLANNER — 67% INFORMATION AT STOPS — 66% SMARTPHONE — 52% PRINTED TIMETABLES — 51% ALERTS (EMAIL AND/OR TEXT) — 17% CUSTOMER SERVICE CALL CENTER — 12% SOCIAL MEDIA — 9%	As will be noted in the service quality section, Riders are increasingly satisfied with their ability to get information online. Given wide use, this service is important to maintain. Riders are less satisfied with information at bus stops. Given wide use, this should be a targeted area for improvements. Metro should continue to work with local and national developers to develop apps for smartphones. If Metro eliminates printed timetables it is likely to affect a significant number of Riders.
Smartphones	Nearly seven out of ten Riders have a smartphone, down from 2013. • Smartphone ownership in King County is higher than the national average of 58%*. Riders, notably Moderate Regular and Infrequent Riders, are increasingly using smartphones to get information. *Source: http://www.pewinternet.org/data-trend/mobile/cell-phone-and-smartphone-ownership-demographics/	**2012 2013 2014** **SMARTPHONE OWNERSHIP** 60% 76%▲ 69%▼ **USE TO GET INFORMATION ABOUT METRO** **FREQUENT REGULAR RIDERS** 83% 83% 81% **MODERATE REGULAR RIDERS** 69% 77% 79%▲ **INFREQUENT RIDERS** 55% 56% 67%▲ *Significant increase (▲) or (▼) from previous year*	While smartphone ownership is high and represents an important source of information about Metro, not all Riders have smartphones. Notably, lower income and older Riders are less likely to own a smartphone; they may also be less likely to have access to a computer and/or the Internet. These Riders need alternative sources of information.

Primary Information Sources

Online sources are the most commonly used sources of information.

- Two out of three Riders use either Metro Online or the Regional Trip Planner.

Riders also rely heavily on information at stops, transit centers, and park-and-ride lots

One out of two Riders continue to rely on printed timetables.

Figure 45: Sources of Information about Metro
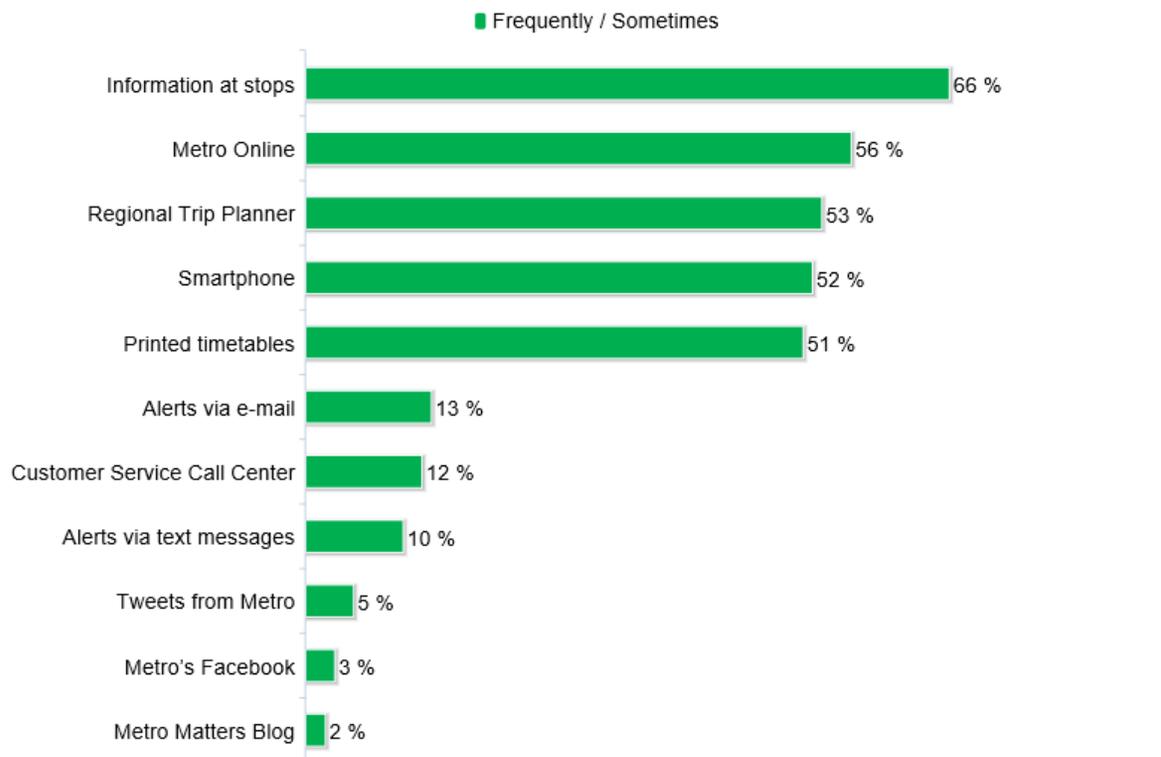
■ Frequently / Sometimes

Source	%
Information at stops	66 %
Metro Online	56 %
Regional Trip Planner	53 %
Smartphone	52 %
Printed timetables	51 %
Alerts via e-mail	13 %
Customer Service Call Center	12 %
Alerts via text messages	10 %
Tweets from Metro	5 %
Metro's Facebook	3 %
Metro Matters Blog	2 %

Questions: IN1 How often do you use each of the following to get information regarding Metro? Would you say frequently, sometimes, rarely, or never?
Base: Regular and Infrequent Riders; Year 2014

	n	nw
2014	1,102	1,161

Regular Riders, notably Moderate Regular Riders, are more likely than Infrequent Riders to use information posted at stops, transit centers, and park-and-ride lots.

Use of Metro Online and/or the Regional Trips Planner is consistent across all segments.

Smartphone use is higher among Regular Riders, notably Frequent Regular Riders, than Infrequent Riders.

Frequent Regular Riders are more likely than Moderate Regular Riders and Infrequent Riders to say they have signed up to receive alerts via text or email.

Table 41: Sources of Information about Metro by Frequency of Riding

	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
Information at stops	68% (d▲)	67%	72% (d▲)	62% (a▼,c▼)
Metro Online	56%	58%	53%	55%
Smartphone	56% (d▲)	57% (d▲)	53%	45% (a▼,b▼)
Regional Trip Planner	52%	53%	51%	56%
Printed timetables	49%	49%	50%	53%
Alerts via e-mail	17% (c▲,d▲)	20% (c▲,d▲)	11% (a▼,b▼,d▲)	7% (a▼,b▼,c▼)
Customer Service Call Center	12%	13%	11%	11%
Alerts via text messages	12% (d▲)	13% (d▲)	9%	6% (a▼,b▼)
Tweets from Metro	5%	5%	5%	4%
Metro's Facebook	3%	3%	2%	2%
Metro Matters Blog	2%	2%	3%	2%

Base: Regular and Infrequent Riders; Year 2014

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	861	591	266	241
n_w	719	498	218	442

Smartphones

Nearly seven out of ten Riders own a smartphone.

- Smartphone ownership decreased significantly from 2013. This decrease may be due to the higher percentage of older Riders surveyed in 2014 and as shown in Table below, older Riders are less likely to own a Smartphone.

Figure 46: Smartphone Ownership

% of Riders Owning Smartphones

	2012	2013	2014
n	1,218	1,395	1,102
n_w	1,218	1,395	1,161
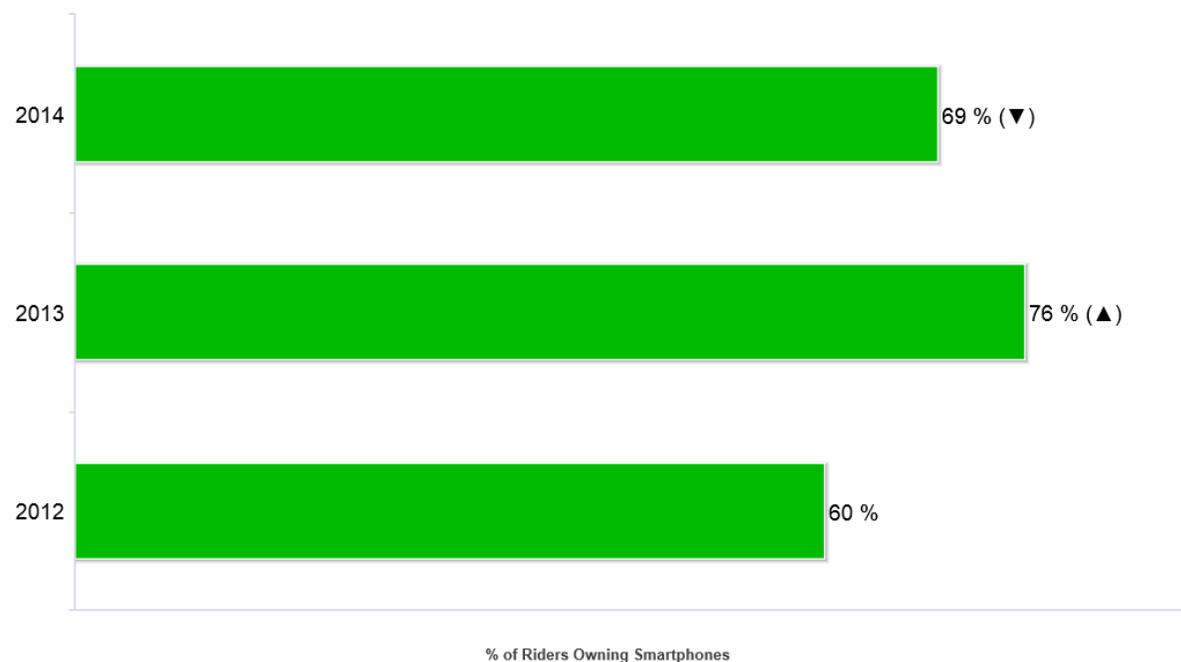
Questions: IN4A Do you own a Smartphone?
Base: Regular and Infrequent Riders

▲ / ▼ *indicates a statistically significant change from previous year*

Smartphone ownership is clearly related to age and is significantly lower among older Riders, notably those 65 and older.

Table 42: Smartphone Ownership by Age

(a) 16-17	(b) 18 - 34	(c) 35 - 54	(d) 55-64	(e) 65+
69% (b▼,e▲)	87% (a▲,d▲,e▲)	80% (d▲,e▲)	63% (b▼,c▼,e▲)	36% (a▼,b▼,c▼,d▼)

Base: Regular and Infrequent Riders; Year 2014

	16–17	18–34	35–54	55–64	65 +
n	35	280	390	262	215
n_w	37	283	409	279	241

Smartphone ownership is also related to income. • Notably, Low-Income Riders (those with incomes less than $35,000 and, to a lesser extent, those with household incomes between $35,000 and $55,000 are significantly less likely to own a smartphone.	*Table 43: Smartphone Ownership by Income*

Table 43: Smartphone Ownership by Income

(a) <$35,000	(b) $35,000 to $55,000	(c) $55,000 to $75,000	(d) $75,000 to $100,000	(e) $100,000+
44% (b▼,c▼,d▼,e▼)	66% (a▲,e▼)	73% (a▲,e▼)	76% (a▲,e▼)	92% (a▲,b▲,c▲,d▲)

Base: Regular and Infrequent Riders; Year 2014

	< $35,000	$35,000–$55,000	$55,000 –$75,000	$75,000 –$100,000	$100,000+
n	268	154	151	129	316
nw	279	153	167	134	336

There are no differences in smartphone ownership between Regular and Infrequent Riders.

Table 44: Smartphone Ownership by Frequency of Riding

(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
70%	71%	67%	68%

Base: Regular and Infrequent Riders; Year 2014

	Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
n	861	591	266	241
nw	719	498	218	442

Use of smartphones to get information about Metro increased significantly between 2012 and 2013 but remained nearly unchanged in 2014.

- Currently just over half of all Riders frequently or sometimes use a smartphone to get information about Metro.
- Use decreased most among Regular Riders, notably Frequent Regular Riders.

Table 45: Riders' Use (Frequently / Sometimes) of Smartphones to Get Information

	2012	2013	2014
ALL Riders	42%	55% (▲)	52%

	2012	2013	2014
REGULAR Riders	48%	63% (▲)	56% (▼)
Frequent Regular Riders	50%	66% (▲)	57% (▼)
Moderate Regular Riders	43%	59% (▲)	53%
INFREQUENT Riders	32%	41% (▲)	45%

Questions: IN1L How often do you use a Smartphone to get information regarding Metro? Would you say frequently, sometimes, rarely, or never?
Base: Regular and Infrequent Riders

	2012	2013	2014
n	1,218	1,395	1,102
nw	1,218	1,395	1,161

Three out of four Riders who own a smartphone frequently or sometimes use their smartphone to get information about Metro.

- Among owners, their use to get information about Metro has increased each year and is up significantly from the baseline (2012) year.
- This increase is significant for Moderate Regular and Infrequent Riders. Frequent Regular Riders have been frequent users of smartphones to get information about Metro since 2012.

Table 46: Smartphone Owners' Use (Frequently / Sometimes) of Smartphones to Get Information

	(a) 2012	(b) 2013	(c) 2014
ALL Riders	70%	72%	75% (a▲)

	(a) 2012	(b) 2013	(c) 2014
REGULAR Riders	79%	81%	80%
Frequent Regular Riders	83%	83%	81%
Moderate Regular Riders	69%	77%	79% (a▲)
INFREQUENT Riders	55%	56%	67% (a▲)

Base: Regular and Infrequent Riders who own a smartphone

	2012	2013	2014
n	697	826	797
n_w	722	648	797

▲ / ▼ *indicates a statistically significant change from baseline year (2012)*

Printed Timetables

Use of Printed Timetables

Half of all Riders use printed timetables to get information about Metro.	*Figure 47: Frequency of Using Printed Timetables to Get Information about Metro* Questions: IN1 How often do you use printed timetables to get information regarding Metro? Would you say frequently, sometimes, rarely, or never? Base: Regular and Infrequent Riders; Year 2014
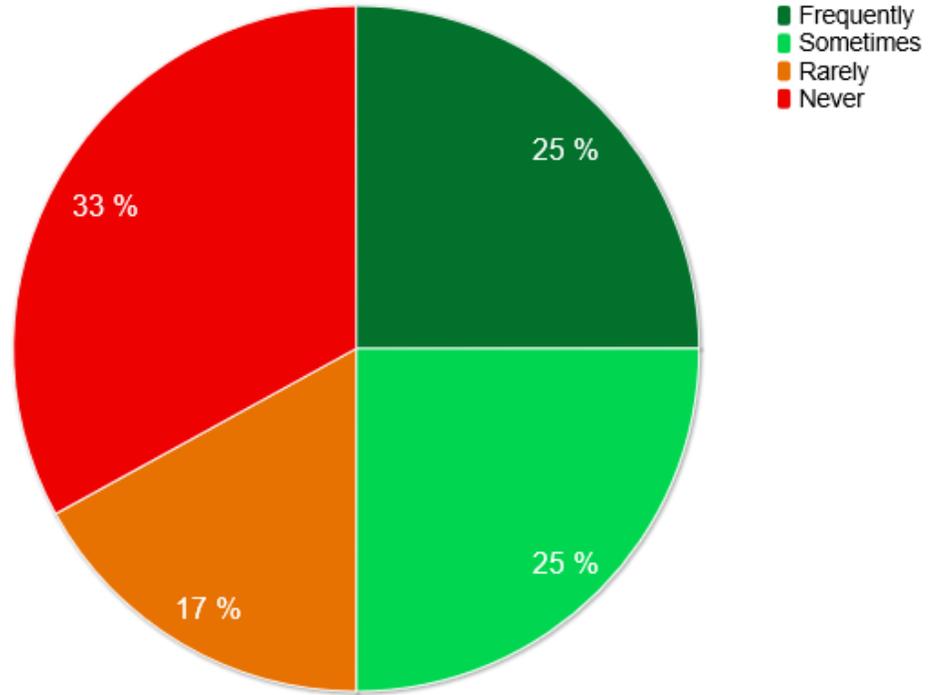
Questions: IN1 How often do you use printed timetables to get information regarding Metro? Would you say frequently, sometimes, rarely,
            or never?
Base: Regular and Infrequent Riders; Year 2014

	n	*n_w*
2014	*1,102*	*1,161*

There are no significant differences in use of printed timetables between Regular and Infrequent Riders.	*Table 47: Use (Frequently or Sometimes) of Printed Timetables by Frequency of Riding*

(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
49%	49%	50%	53%

Base: Regular and Infrequent Riders; Year 2014

	Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
n	861	591	266	241
n_w	719	498	218	442

Use of printed timetables increases among older riders, notably those 65 and older.	*Table 48: Use (Frequently or Sometimes) of Printed Timetables by Age*

(a) 16-17	(b) 18 - 34	(c) 35 - 54	(d) 55-64	(e) 65+
35% (d▼,e▼)	41% (c▼,d▼,e▼)	51% (b▲,e▼)	54% (a▲,b▲)	60% (a▲,b▲,c▲)

Base: Regular and Infrequent Riders; Year 2014

	16–17	18–34	35–54	55–64	65+
n	35	280	390	262	215
n_w	37	283	409	279	241

Use of printed timetables cuts across income segments, with the exception of the most affluent riders.	*Table 49: Use (Frequently or Sometimes) of Printed Timetables by Income*

(a) <$35,000	(b) $35,000 to $55,000	(c) $55,000 to $75,000	(d) $75,000 to $100,000	(e) $100,000+
58% (e▲)	53% (e▲)	53% (e▲)	52% (e▲)	38% (a▼,b▼,c▼,d▼)

Base: Regular and Infrequent Riders; Year 2014

	< $35,000	$35,000–$55,000	$55,000 –$75,000	$75,000 –$100,000	$100,000+
n	268	154	151	129	316
n_w	279	153	167	134	336

Impact of Eliminating Printed Timetables

The majority of riders who use timetables indicate that they would go online and print them out.

Figure 48: What Riders Would Do If Metro Eliminated Printed Timetables
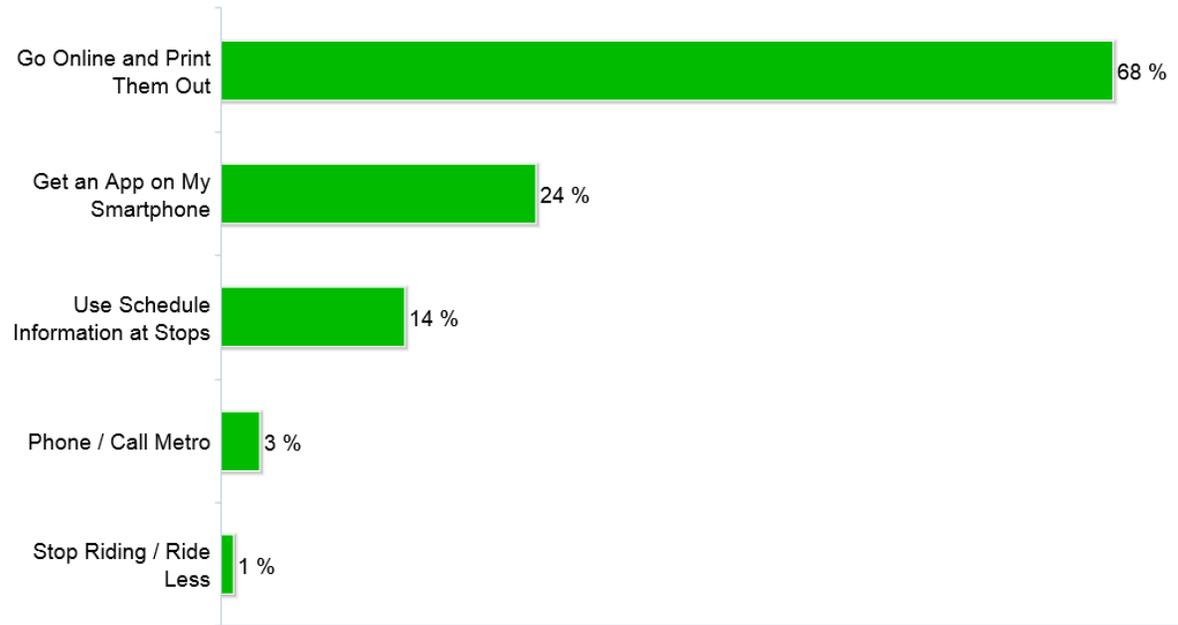
Question: IN5A If Metro stopped printing timetables in order to save money, how would you get information on routes and schedules?
Base: Regular and Infrequent Riders who frequently or sometimes use printed timetables; Year 2014

	n	n_w
2014	542	585

While Riders will adapt, eliminating printed timetables will have an adverse effect on Riders' perceptions of Metro, notably the 25 percent of Riders who frequently use printed timetables.

Figure 49: Impact on Perceptions of Metro If Printed Timetables Are Eliminated

■ Significantly more negative towards Metro ■ Somewhat more negative towards Metro ▌Would make no difference ■ More Positive

(a) Frequently

-26 % (b▲)   -26 %   36 % (b▼)   12 %

(b) Sometimes

-12 % (a▼)   -29 %   49 % (a▲)   11 %
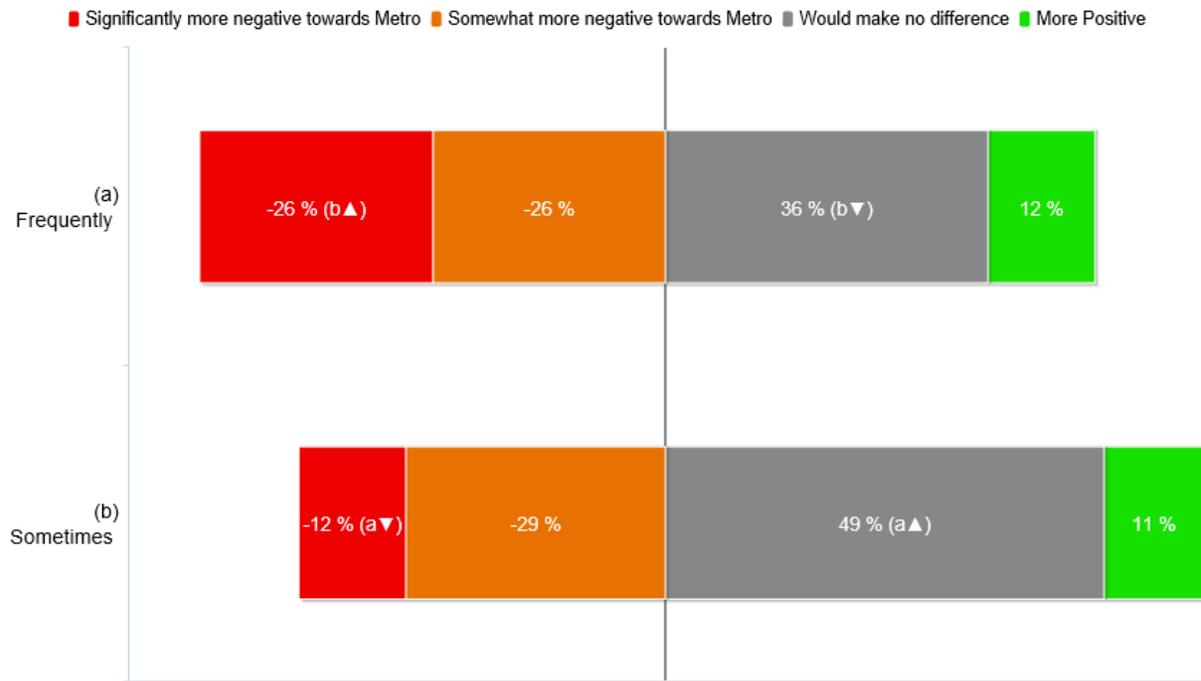
Question: IN5B If Metro stopped printing timetables, how would this make you feel?
Base: Regular and Infrequent Riders who frequently or sometimes use printed timetables; Year 2014

	n	n_w
2014	542	585

FINDINGS: OVERALL SATISFACTION WITH METRO AND GOODWILL

Summary

Topic	What We Found				What It Means

Overall Satisfaction

What We Found:

After several years of declining overall satisfaction ratings, Riders' overall satisfaction with Metro increased significantly.

- The percentage very satisfied increased and the percentage dissatisfied decreased.

	2012	2013	2014
TOTAL SATISFIED			
	88%	85%▼	90%▲
VERY SATISFIED			
	46%	42%▼	46%▲
DISSATISFIED			
	10%	14%▲	10%▼

Significant increase (▲) or (▼) from previous year

What It Means:

While the service cuts do have an impact on riders' satisfaction with specific elements of service, Metro's management of these cuts coupled with improvements in some very important areas, such as personal safety, has paid off.

Expectations for Service

What We Found:

Overall there has been no significant change in Riders' expectations for service and whether Metro delivers on these expectations.

- Overall satisfaction with Metro increased significantly for those who have high expectations.
- Overall satisfaction remained unchanged for those with low or mixed expectations.

	Expectations	
	2013	2014
Expect high quality & confident can deliver	23%	23%
Expect high quality & generally positive can deliver	48%	47%
Have low or mixed impressions & expect problems	29%	30%

% Very Satisfied with Metro by Expectations		
	% Very Satisfied	
	2013	2014
Expect high quality & confident can deliver	72%	82%▲
Expect high quality & generally positive can deliver	43%	51%▲
Have low or mixed impressions & expect problems	14%	11%

Significant increase (▲) or (▼) from previous year

What It Means:

Those with high expectations may have expected issues with the service cuts that may not have been realized and so became more satisfied.

Those with low expectations may have expected that service cuts would cause issues. Their expectations may have been met and they remained dissatisfied.

Topic	What We Found	What It Means
External Influences	The majority of Riders continue to hear good things about Metro from their friends and colleagues. • However, negative word of mouth has a significant influence on overall satisfaction. On the other hand, negative influences from the media are increasing. • Negative media coverage has less of an impact on overall satisfaction with Metro.	Metro should continue to use social media as well as more traditional media sources to tell a positive story about the system.

	2013	**2014**
	Word of Mouth	
Agree	67%	62%▼
Disagree	28%	30%
	Media	
Agree	63%	46%▼
Disagree	32%	46%▲

Significant increase (▲) or (▼) from previous year

% Satisfied with Metro by Hear Positive Things about Metro Word of Mouth		
	2013	**2014**
Strongly Agree	90%	99%▲
Somewhat Agree	85%	94%▲
Disagree	20%	29%▲

% Satisfied with Metro by Hear Positive Things about Metro in Media		
	2013	**2014**
Strongly Agree	89%	100%▲
Somewhat Agree	90%	96%▲
Disagree	22%	22%

Significant increase (▲) or (▼) from previous year

Topic	What We Found	What It Means
Agency Relations	Riders in 2014 are significantly more likely than those in 2013 to say they strongly agree that they like to be able to say they ride Metro. • This increase is evident countywide. However, those living in Seattle / North King County are the least likely to strongly agree.	Marketing communications focusing on riders saying why they like to ride Metro may serve to offset negative word of mouth and/or media coverage.

	2013	**2014**
	% Strongly Agree	
Agency I like & respect	44%	45%
Agency I trust	43%	47%
I like to be able to say I ride	41%	56%▲

Significant increase (▲) or (▼) from previous year

Topic	What We Found		What It Means
High Value / Customer Focus	Riders continue to agree that Metro provides good value for the level of service it provides and, to a lesser extent, values its customers. They are less likely to agree that Metro provides excellent customer service and has consistently high service standards. Riders are least likely to strongly agree that Metro is innovative. Further, agreement with this statement decreased significantly in 2014.	<table><tr><td></td><td>2013</td><td>2014</td></tr><tr><td></td><td colspan=2>% Strongly Agree</td></tr><tr><td>Provides good value for service provided</td><td>46%</td><td>48%</td></tr><tr><td>Values its customers</td><td>46%</td><td>44%</td></tr><tr><td>Provides excellent customer service</td><td>37%</td><td>39%</td></tr><tr><td>Has consistently high service standards</td><td>34%</td><td>37%</td></tr><tr><td>Is innovative</td><td>28%</td><td>21%▼</td></tr></table> *Significant increase (▲) or (▼) from previous year*	There are opportunities to build support for Metro's brand and perceptions of its focus on value and customers. As revenues improve, Metro should look for opportunities to provide more innovative services. New options for fare payment, real-time schedule information, and smartphone apps are potentials area in which existing innovations could be adopted by Metro.
Goodwill Index	As in 2013, a Goodwill Index was created to reflect the influence of External Relations, Agency Relations, and Advocacy (like to be able to say I ride Metro) have on Riders' satisfaction with and expectations of Metro. It should be noted that some questions asked in 2013 were not asked in 2014 and so a new index was computed. While the overall Goodwill Index, decreased slightly between 2013 and 2014, this decrease is statistically significant only among Regular Riders, notably Frequent Regular Riders.	<table><tr><td></td><td>2013</td><td>2014</td></tr><tr><td>All Riders</td><td>3.97</td><td>3.91</td></tr><tr><td>Regular Riders</td><td>4.06</td><td>3.90▼</td></tr><tr><td>Frequent Regular Riders</td><td>4.10</td><td>3.88▼</td></tr><tr><td>Moderate Regular Riders</td><td>3.98</td><td>3.94</td></tr><tr><td>Infrequent Riders</td><td>3.80</td><td>3.92</td></tr></table> *Goodwill Index is based on a 5-point scale where "1" represents "very low" goodwill and "5" represents "very high" goodwill* *Significant increase (▲) or (▼) from previous year*	Despite the service changes and negative media coverage, Riders' goodwill was not significantly impacted. As subsequent analysis shows Frequent Regular Riders were more likely to be impacted by the service changes and hence are more likely to have lost some goodwill towards Metro. Given the high influence of Riders' trust in Metro, efforts should focus on building greater trust in the agency and confidence that the decisions being made are in the best interests of both the agency and its customers.

Topic	What We Found		What It Means
Value and Customer Focus Index	A second index was computed to reflect the influence of Riders' perception of Metro's focus on the customer and providing high value service on their satisfaction with and expectations of Metro. Overall Metro has a Value / Customer Focus Index of 3.22, suggesting an average rating. There was no change from 2013.	<table><tr><td></td><td>**2013**</td><td>**2014**</td></tr><tr><td>**All Riders**</td><td>3.20</td><td>3.22</td></tr><tr><td>**Regular Riders**</td><td>3.22</td><td>3.19</td></tr><tr><td>**Frequent Regular Riders**</td><td>3.20</td><td>3.18</td></tr><tr><td>**Moderate Regular Riders**</td><td>3.24</td><td>3.20</td></tr><tr><td>**Infrequent Riders**</td><td>3.16</td><td>3.27</td></tr></table> *Value & Customers Index is based on a 5-point scale where "1" represents "very low" value / customer focus and "5" represents "very high" value / customer focus* *Significant increase (▲) or (▼) from previous year*	The lower rating for Value and Customer Focus than Goodwill suggests that while Riders have generally positive impressions of Metro as an agency (goodwill), they are somewhat less positive that Metro meets their expectations for delivering high value service with a focus on the customer.

Overall Satisfaction

After several years of declining overall satisfaction with Metro, the total percent of Satisfied Riders increased significantly, due in part to the significant increase in the percentage of Very Satisfied Riders.

- The percentage of Satisfied Riders remains below the peak in 2010.
- The percentage of Very Satisfied Riders also remains below 2010/2011 levels.

The percentage of Dissatisfied Riders also decreased significantly.

Figure 50: Trends in Overall Satisfaction
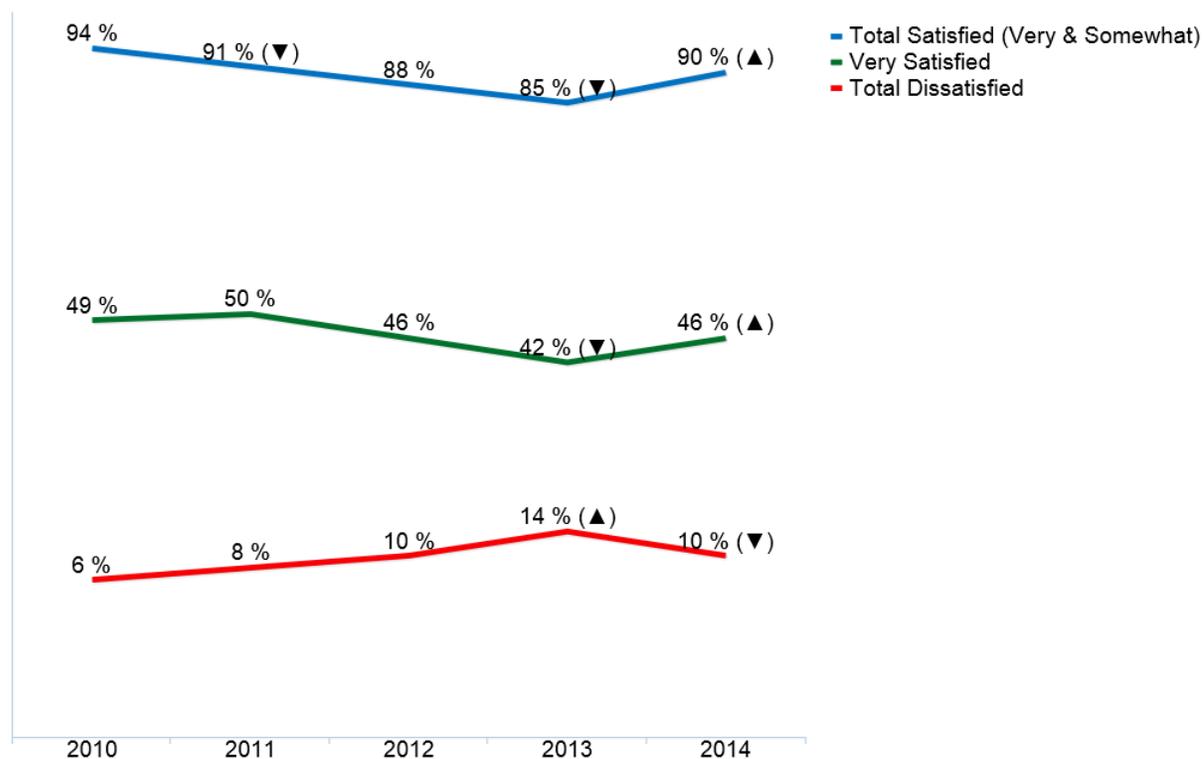
Questions: GW1A   Overall, would you say you are satisfied or dissatisfied with Metro? Would that be very or somewhat [satisfied / dissatisfied]?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n_w	1,140	1,455	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

There was no significant change in total overall satisfaction among Regular Riders.

- However, the percentage of Very Satisfied Regular Riders increased.

Total overall satisfaction increased significantly among Infrequent Riders.

- Infrequent Riders have traditionally been less satisfied than Regular Riders.

Total overall satisfaction remains unchanged among Frequent Regular Riders.

- The percentage of Very Satisfied Frequent Regular Riders continues to decrease.

Total overall satisfaction remains unchanged among Moderate Regular Riders.

- The percentage of Very Satisfied Moderate Regular Riders increased significantly with a corresponding decrease in the percentage of Somewhat Satisfied Moderate Regular Riders.

Table 50: Trends in Overall Satisfaction by Frequency of Riding

		2010	2011	2012	2013	2014
REGULAR Riders	**Total Satisfied (Very & Somewhat)**	95%	92% (▼)	89% (▼)	88%	88%
	Very Satisfied	51%	54%	48% (▼)	44% (▼)	47%
	Somewhat Satisfied	44%	38% (▼)	41%	45%	41%
Frequent Regular Riders	**Total Satisfied (Very & Somewhat)**	96%	93% (▼)	90%	89%	89%
	Very Satisfied	52%	58% (▲)	49% (▼)	47%	45%
	Somewhat Satisfied	44%	35% (▼)	42% (▲)	42%	44%
Moderate Regular Riders	**Total Satisfied (Very & Somewhat)**	93%	89%	85%	87%	87%
	Very Satisfied	49%	45%	47%	38% (▼)	53% (▲)
	Somewhat Satisfied	43%	44%	38%	48% (▲)	34% (▼)
INFREQUENT Riders	**Total Satisfied (Very & Somewhat)**	91%	89%	88%	80% (▼)	91% (▲)
	Very Satisfied	46%	42%	43%	37%	44%
	Somewhat Satisfied	46%	47%	45%	42%	48%

Questions: GW1A   Overall, would you say you are satisfied or dissatisfied with Metro? Would that be very or somewhat [satisfied / dissatisfied]?
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n$_w$	1,140	1,455	1,218	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

The percentage of Satisfied Riders increased countywide, but the increase is significant (90% confidence) among Riders in South and East King County.

- Similarly, the percentage of Very Satisfied Riders increased countywide, but the increase is significant (90% confidence) only among South King County Riders.

Table 51: Trends in Overall Satisfaction by Area of Residence

		2010	2011	2012	2013	2014
Seattle / North King	**Total Satisfied (Very & Somewhat)**	94%	92%	88% (▼)	84% (▼)	87%
	Very Satisfied	48%	48%	43%	40%	41%
	Somewhat Satisfied	45%	44%	45%	44%	46%
South King	**Total Satisfied (Very & Somewhat)**	96%	89% (▼)	86%	86%	91% (▲)
	Very Satisfied	53%	52%	50%	41% (▼)	48% (▲)
	Somewhat Satisfied	44%	37% (▼)	36%	45% (▲)	43%
East King	**Total Satisfied (Very & Somewhat)**	90%	90%	92%	86% (▼)	91% (▲)
	Very Satisfied	46%	52%	52%	45% (▼)	50%
	Somewhat Satisfied	44%	38%	40%	41%	41%

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n_w	1,140	1,455	1,218	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year; significance testing done at 90% confidence level*

There are no differences in total overall satisfaction between Low- and Higher-Income Riders.

- Much of the decrease in total overall satisfaction over the years can be attributed to the significant decrease in the percentage of Very Satisfied Higher-Income Riders.

- The percentage of Very Satisfied Higher-Income Riders increased significantly in 2014.

Table 52: Trends in Overall Satisfaction by Income

		2010	2011	2012	2013	2014
$35,000 or more	**Total Satisfied (Very & Somewhat)**	93%	91%	89%	83% (▼)	90% (▲)
	Very Satisfied	50%	48%	43% (▼)	38% (▼)	43% (▲)
	Somewhat Satisfied	44%	43%	46%	45%	46%
Less than $35,000	**Total Satisfied (Very & Somewhat)**	95%	92%	88%	91%	90%
	Very Satisfied	48%	55%	54%	52%	52%
	Somewhat Satisfied	47%	37% (▼)	34%	39%	38%

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n$_w$	1,140	1,455	1,218	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

Experienced Riders' overall satisfaction with Metro increased significantly in 2014, due to an increase in the percentage of Very Satisfied Riders.

Experienced Riders continue to be less likely than New Riders to say they are very satisfied with Metro.

Table 53: Trends in Overall Satisfaction by Length of Time Riding

		2010	2011	2012	2013	2014
Experienced Rider	**Total Satisfied (Very & Somewhat)**	94%	91% (▼)	88% (▼)	84% (▼)	89% (▲)
	Very Satisfied	49%	49%	46%	40% (▼)	45% (▲)
	Somewhat Satisfied	45%	42%	42%	44%	44%
New Rider	**Total Satisfied (Very & Somewhat)**	95%	93%	92%	93%	93%
	Very Satisfied	52%	54%	47%	53%	54%
	Somewhat Satisfied	44%	39%	45%	40%	39%

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014
n	1,140	1,455	1,218	1,395	1,102
n$_w$	1,140	1,455	1,218	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

Meeting Rider Expectations

In 2013 an additional question was added to measure the extent to which Metro meets riders' expectations for service. This question builds on the theory of disconfirmation which examines the extent to which the outcome—delivered service—meets or contradicts expectations.

- Customers experiencing disconfirmation (i.e., service does not meet their expectations) may initially expend additional effort to support their original expectations (e.g., take an earlier, less crowded bus or change routes), but this could ultimately result in higher levels of dissatisfaction. Alternatively, riders may lower their expectations, which then decreases goodwill towards the agency and support for riding.
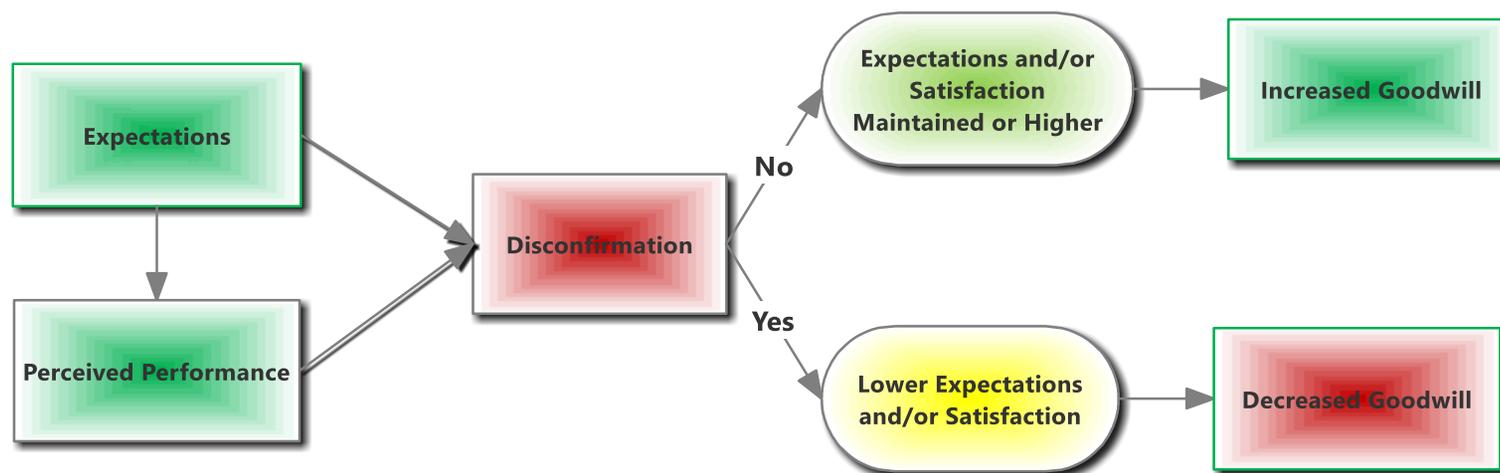
The majority have high expectations for service quality and generally feel that Metro can meet these expectations for quality.

- Riders' expectations for service quality have not changed since 2013.

At the same time, a large percentage (30%) have low or mixed impressions of Metro and expect problems with service.

Figure 51: Riders' Expectations for Service
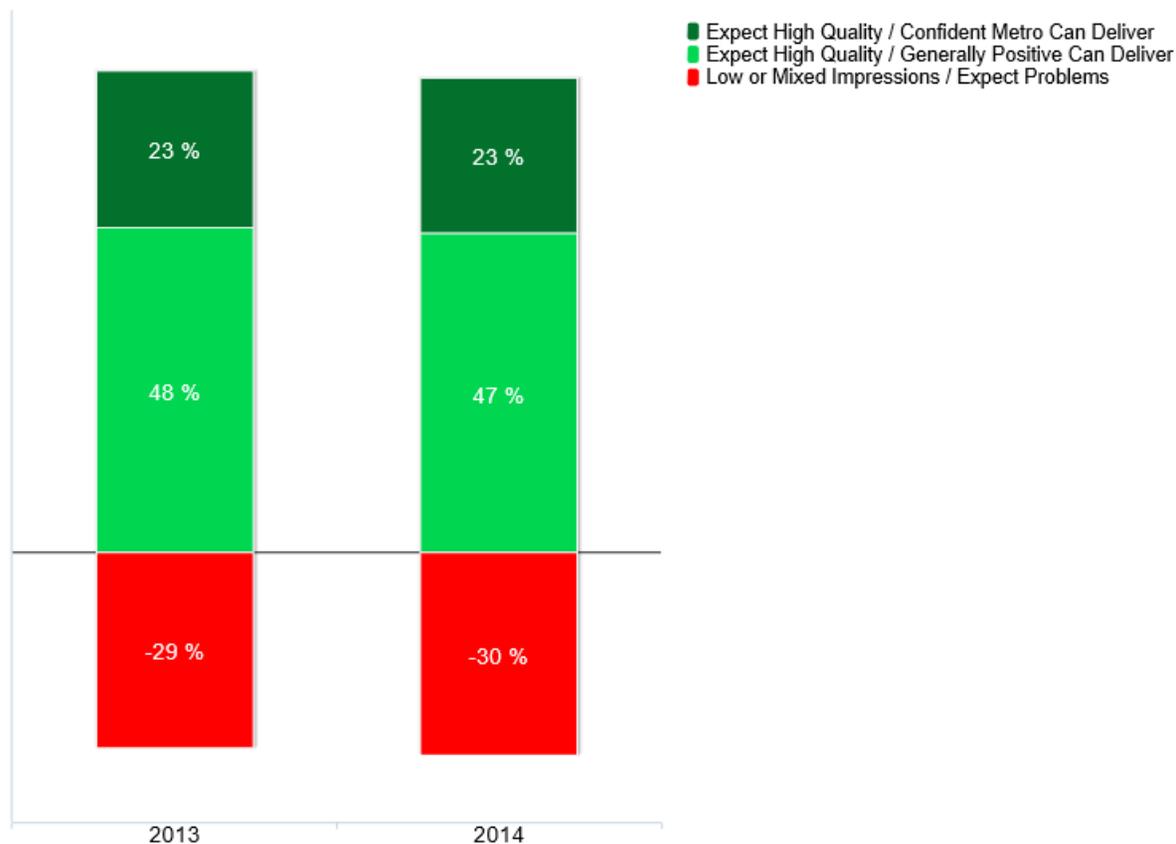
Question: GW7 Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?

Base: Regular and Infrequent Riders

	2013	2014
n	1,395	1,102
n_w	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

There have been no significant changes in Riders' expectations among the different rider segments.

Figure 52: Trends in Riders' Expectations for Service by Rider Status

		2013	2014
REGULAR Riders	**Expect High Quality / Confident Metro Can Deliver**	25%	24%
	Expect High Quality / Generally Positive Can Deliver	45%	44%
	Low or Mixed Expectations / Expect Problems	30%	33%
Frequent Regular Riders	**Expect High Quality / Confident Metro Can Deliver**	27%	23%
	Expect High Quality / Generally Positive Can Deliver	44%	45%
	Low or Mixed Expectations / Expect Problems	30%	32%
Moderate Regular Riders	**Expect High Quality / Confident Metro Can Deliver**	21%	26%
	Expect High Quality / Generally Positive Can Deliver	49%	41%
	Low or Mixed Expectations / Expect Problems	31%	33%
INFREQUENT Riders	**Expect High Quality / Confident Metro Can Deliver**	20%	21%
	Expect High Quality / Generally Positive Can Deliver	53%	52%
	Low or Mixed Expectations / Expect Problems	27%	27%

Base: Regular and Infrequent Riders

	2013	2014
n	1,395	1,102
n_w	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

There have been some changes in expectations in South and East King County.

- Riders living in East King County continue to have the highest expectations for service. However, the extent to which East King County Riders expect high quality and are generally positive Metro can deliver decreased somewhat (90% confidence level).
- The extent to which South King County Riders have low or mixed expectations increased somewhat (90% confidence level).

Table 54: Trends in Riders' Expectations for Service by Area of Residence

		2013	2014
Seattle / North King	Expect High Quality / Confident Metro Can Deliver	22%	19%
	Expect High Quality / Generally Positive Can Deliver	45%	46%
	Low or Mixed Expectations / Expect Problems	33%	35%
South King	Expect High Quality / Confident Metro Can Deliver	27%	23%
	Expect High Quality / Generally Positive Can Deliver	47%	44%
	Low or Mixed Expectations / Expect Problems	26%	32%
East King	Expect High Quality / Confident Metro Can Deliver	23%	27%
	Expect High Quality / Generally Positive Can Deliver	58%	50%
	Low or Mixed Expectations / Expect Problems	19%	23%

Base: Regular and Infrequent Riders

	2013	2014
n	1,395	1,102
n_w	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

Riders with high expectations for and confidence in Metro services are satisfied with Metro services.

- Overall satisfaction with Metro—notably the percent very satisfied with Metro—increased significantly in 2014 among those Riders with very high expectations and confidence and, to a lesser extent, those with generally high expectations and positive attitudes.

Riders with low expectations are significantly less satisfied with Metro than are those with higher expectations.

- Among these riders, there has been no change in overall satisfaction in 2014.

Table 55: Trends in Riders' Expectations for Service by Overall Satisfaction with Metro

		2013	2014
Expect High Quality / Confident Metro Can Deliver	Total Satisfied (Very & Somewhat)	92%	100% (▲)
	Very Satisfied	72%	82% (▲)
	Somewhat Satisfied	20%	18%
	Total Dissatisfied	8%	0% -
Expect High Quality / Generally Positive Can Deliver	Total Satisfied (Very & Somewhat)	92%	94%
	Very Satisfied	43%	51% (▲)
	Somewhat Satisfied	49%	43%
	Total Dissatisfied	7%	5%
Low or Mixed Expectations / Expect Problems	Total Satisfied (Very & Somewhat)	68%	70%
	Very Satisfied	14%	11%
	Somewhat Satisfied	54%	60%
	Total Dissatisfied	32%	28%

Base: Regular and Infrequent Riders

	2013	2014
n	1,395	1,102
n_w	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

External Influences

Riders continue to suggest that they:

- Generally hear positive things (62% positive) about Metro from their friends/colleagues.
- Are less likely to hear positive news (46% positive) about Metro from the media.
  - The extent to which Riders hear negative news (i.e., disagree they hear positive things) about Metro from the media has increased significantly since 2013.

Figure 53: Impact of External Influences on Perceptions of Metro
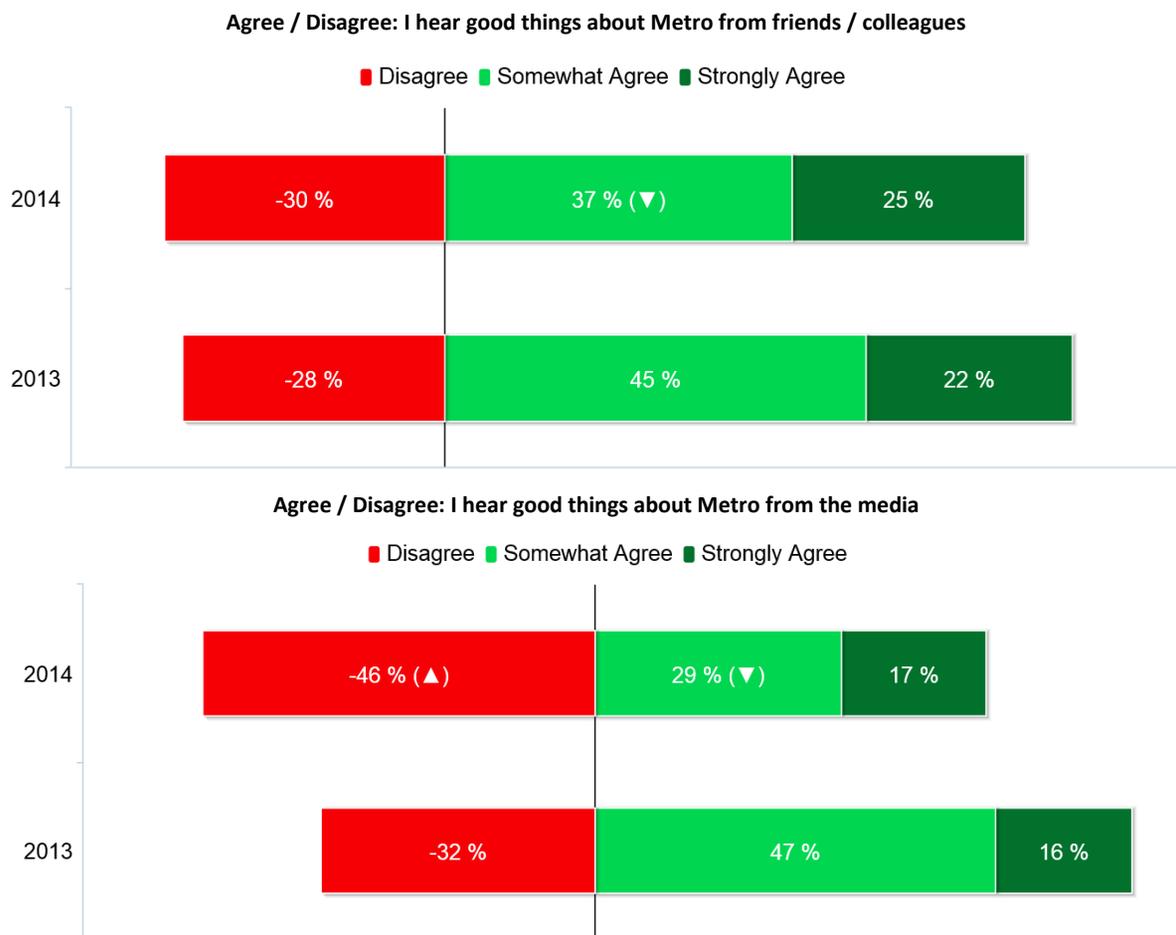
Agree / Disagree: I hear good things about Metro from friends / colleagues

■ Disagree   ■ Somewhat Agree   ■ Strongly Agree

Year	Disagree	Somewhat Agree	Strongly Agree
2014	-30 %	37 % (▼)	25 %
2013	-28 %	45 %	22 %

Agree / Disagree: I hear good things about Metro from the media

■ Disagree   ■ Somewhat Agree   ■ Strongly Agree

Year	Disagree	Somewhat Agree	Strongly Agree
2014	-46 % (▲)	29 % (▼)	17 %
2013	-32 %	47 %	16 %

GW5   Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements. Would that be strongly or somewhat (agree/disagree)?
Base: Regular and Infrequent Riders; random selection of riders

	2013	2014
n	700	526
n_w	458	572

▲ / ▼ indicates a statistically significant change from previous year

Impact of External Influences on Overall Satisfaction and Expectations

Positive word of mouth from friends and colleagues is strongly related to Riders' overall satisfaction.

- More than nine out of ten Riders who hear positive things about Metro are satisfied overall.
- Moreover, overall satisfaction among these Riders increased significantly.

Riders who hear negative things from their friends and colleagues are significantly less satisfied.

- Just less than seven out of ten Riders who hear negative things about Metro are satisfied overall.
- Moreover, dissatisfaction increased significantly among those who hear negative things from their friends and colleagues.

Table 56: Impact of Word-of-Mouth (from Friends / Colleagues) on Riders' Overall Satisfaction

Agree / Disagree: I hear good things about Metro from friends / colleagues

		2013	2014
Strongly Agree	Total Satisfied (Very & Somewhat)	90%	99% (▲)
	Total Dissatisfied	10%	1% (▼)
Somewhat Agree	Total Satisfied (Very & Somewhat)	85%	94% (▲)
	Total Dissatisfied	15%	6% (▼)
Disagree	Total Satisfied (Very & Somewhat)	79%	69% (▼)
	Total Dissatisfied	20%	29% (▲)

Similarly, Riders who hear positive things about Metro from the media are more satisfied with Metro overall.

- As with positive word of mouth, more than nine out of ten Riders who hear positive things from the media are satisfied with Metro.
- The percentage dissatisfied decreased in 2014.

Negative word of mouth has a somewhat greater impact on Rider satisfaction than the media.

- Three out of ten Riders who hear negative things from their friends and family are dissatisfied with Metro compared with two out of ten hearing negative things from the media.
- At the same time, Riders are more likely to hear negative things from the media.

Table 57: Impact of Media on Riders' Overall Satisfaction

Agree / Disagree: I hear good things about Metro from the media

		2013	2014
Strongly Agree	Total Satisfied (Very & Somewhat)	89%	100% (▲)
	Total Dissatisfied	11%	0% -
Somewhat Agree	Total Satisfied (Very & Somewhat)	90%	96% (▲)
	Total Dissatisfied	10%	4% (▼)
Disagree	Total Satisfied (Very & Somewhat)	78%	78%
	Total Dissatisfied	22%	21%

The increase in negative coverage in the media has had a significant impact on Riders' expectations and confidence in Metro's ability to deliver quality service.

- Among those who disagree that they hear good things about Metro in the media, the percentage with low or mixed expectations and expect problems when riding increased significantly.

Table 58: Impact of Media on Riders' Expectations

Agree / Disagree: I hear good things about Metro from the media

		2013	2014
Strongly Agree	Expect High Quality / Confident Metro Can Deliver	60%	64%
	Expect High Quality / Generally Positive Can Deliver	32%	34%
	Low or Mixed Expectations / Expect Problems	8%	2% (▼)
Somewhat Agree	Expect High Quality / Confident Metro Can Deliver	22%	20%
	Expect High Quality / Generally Positive Can Deliver	58%	63%
	Low or Mixed Expectations / Expect Problems	20%	17%
Disagree	Expect High Quality / Confident Metro Can Deliver	19%	9% (▼)
	Expect High Quality / Generally Positive Can Deliver	35%	35%
	Low or Mixed Expectations / Expect Problems	46%	56% (▲)

Positive word of mouth has less of an impact than positive media coverage on Riders' expectations.

- While nearly two-thirds of those who strongly agree they hear positive things from the media have very high expectations, only half of those who strongly agree they hear positive things from their friends and colleagues have very high expectations.

On the other hand negative word of mouth has a slightly greater impact than negative media coverage on Riders' expectations.

- Sixty-three percent of those who hear negative things about Metro from their friends and colleagues have low expectations compared to 56 percent of those who hear negative things from the media.

Table 59: Impact of Word of Mouth on Riders' Expectations

Agree / Disagree: I hear good things about Metro from friends / colleagues

		2013	2014
Strongly Agree	Expect High Quality / Confident Metro Can Deliver	52%	49%
	Expect High Quality / Generally Positive Can Deliver	34%	41%
	Low or Mixed Expectations / Expect Problems	14%	9%
Somewhat Agree	Expect High Quality / Confident Metro Can Deliver	21%	15%
	Expect High Quality / Generally Positive Can Deliver	59%	59%
	Low or Mixed Expectations / Expect Problems	20%	26%
Disagree	Expect High Quality / Confident Metro Can Deliver	16%	8% (▼)
	Expect High Quality / Generally Positive Can Deliver	33%	28%
	Low or Mixed Expectations / Expect Problems	50%	63% (▲)

Agency Relations

Perceptions of Metro

Nine out of ten Riders agree that they like and respect Metro and that Metro is an agency they trust.

- While there are no significant changes at the aggregate level, additional analysis indicates that positive ratings increased for some riders, as discussed in more detail on the next several pages.

Figure 54: Extent to Which Riders Like, Respect, and Trust Metro
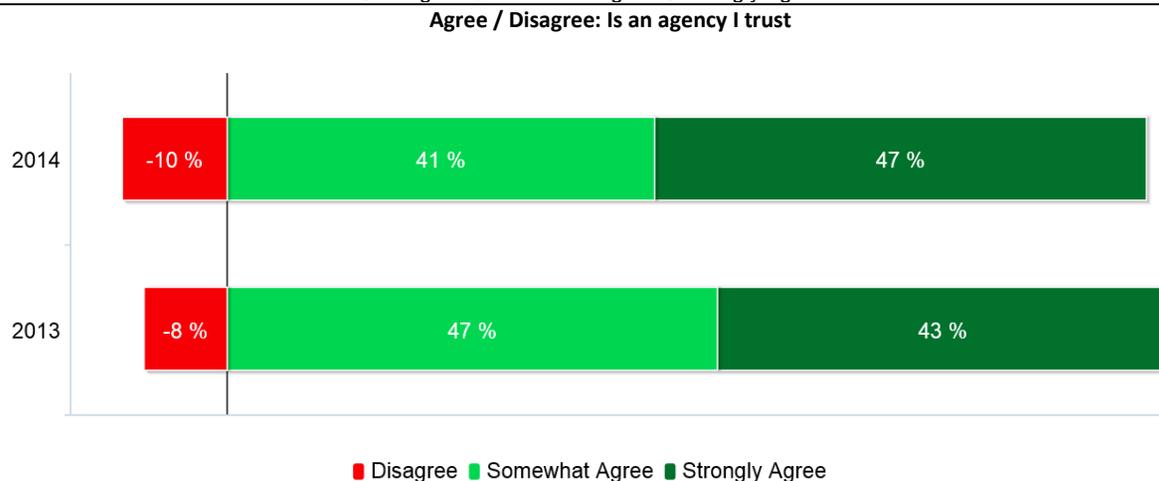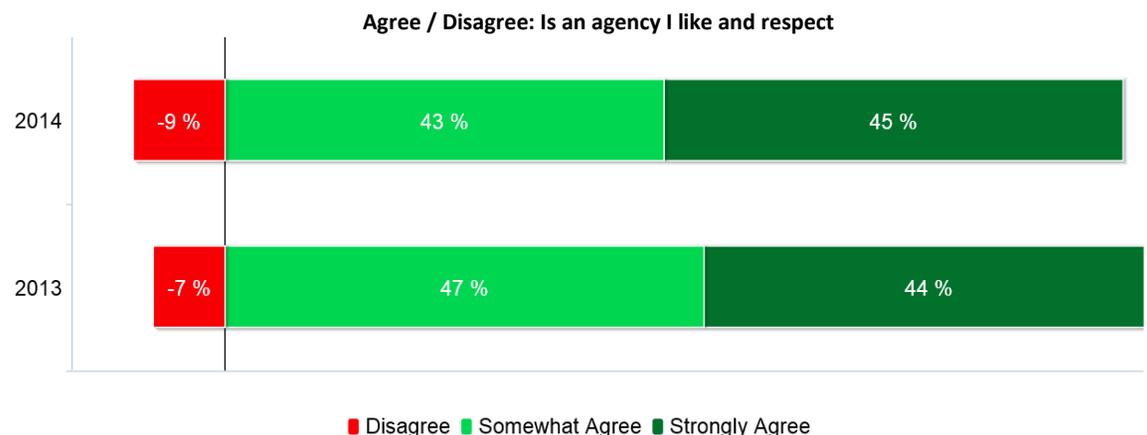
Agree / Disagree: Is an agency I like and respect

	Disagree	Somewhat Agree	Strongly Agree
2014	-9 %	43 %	45 %
2013	-7 %	47 %	44 %

■ Disagree ■ Somewhat Agree ■ Strongly Agree

Agree / Disagree: Is an agency I trust

	Disagree	Somewhat Agree	Strongly Agree
2014	-10 %	41 %	47 %
2013	-8 %	47 %	43 %

■ Disagree ■ Somewhat Agree ■ Strongly Agree

GW5   *Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements. Would that be strongly or somewhat (agree/disagree)?*
Base: Regular and Infrequent Riders; random selection of riders

	2013	2014
n	700	526
nw	458	572

In 2014, strong agreement that Metro is an agency they like and respect is significantly higher among East and, to a lesser extent, South King County Riders than those living in Seattle / North King County.

- Agreement that Metro is an agency they like and respect increased significantly among East King County Riders.

In 2014, Regular Riders continue to be more likely than Infrequent Riders to strongly agree they like and respect Metro. However, strong agreement with this statement

- Increased significantly among Infrequent Riders.
- Decreased among Frequent Regular Riders.

Table 60: Extent to Which Riders Like and Respect Metro by Area of Residence and Rider Status

Agree / Disagree: Metro is an agency I like and respect

	Strongly Agree	
	2013	2014
Seattle / N. King	46%	38%
South King	43%	46%
East King	37%	55% (▲)

	Strongly Agree	
	2013	2014
REGULAR Riders	52%	47%
Frequent Regular Riders	57%	46% (▼)
Moderate Regular Riders	42%	50%
INFREQUENT Riders	29%	43% (▲)

Similarly, 2014 Riders living in East and, to a lesser extent, South King County are somewhat more likely than those in Seattle / North King County to strongly agree that Metro is an agency they trust.

- Unlike the statement about like and respect, the changes in level of agreement with this statement are not significant.

In 2014, Regular Riders continue to be more likely than Infrequent Riders to strongly agree they trust Metro.

- As with the statement about like and respect, Infrequent Riders' trust in Metro increased significantly in 2014.
- The other changes are not statistically significant.

Table 61: Extent to Which Riders Trust Metro by Area of Residence and Rider Status

Agree / Disagree: Metro is an agency I trust

	Strongly Agree	
	2013	2014
Seattle / N. King	41%	40%
South King	48%	47%
East King	41%	54%

	Strongly Agree	
	2013	2014
REGULAR Riders	51%	50%
Frequent Regular Riders	56%	50%
Moderate Regular Riders	41%	50%
INFREQUENT Riders	30%	42% (▲)

Advocacy

The extent to which riders agree that they like to say they ride Metro represents their potential advocacy for Metro.

The extent to which Riders strongly agree they like to be able to say they ride Metro increased significantly in 2014.

- The percentage disagreeing with this statement decreased significantly as well.

Figure 55: Extent to Which Riders Say They Like to Be Able to Say They Ride Metro
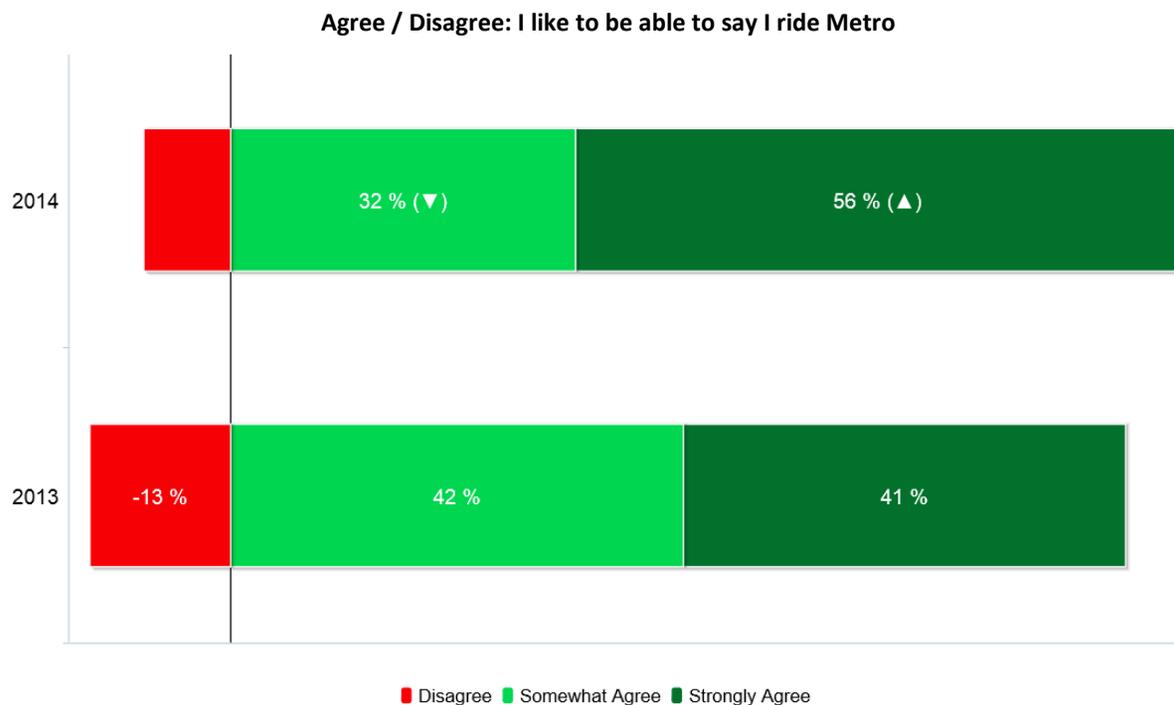
Agree / Disagree: I like to be able to say I ride Metro

	Disagree	Somewhat Agree	Strongly Agree
2014		32 % (▼)	56 % (▲)
2013	-13 %	42 %	41 %

■ Disagree   ■ Somewhat Agree   ■ Strongly Agree

GW5   Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements. Would that be strongly or somewhat (agree/disagree)?
Base: Regular and Infrequent Riders; random selection of riders

	2013	2014
n	700	526
nw	458	572

▲ / ▼ *indicates a statistically significant change from previous year*

The extent to which Riders strongly agree that they like to say they ride Metro increased in all areas of the county.

- The increase is greatest among East King County Riders.
- While agreement increased among Seattle / North King County Riders, this segment has the lowest percentage of strong agreement.

Strong agreement with this statement also increased for both Regular and Infrequent Riders.

- However, the increase is greatest for Infrequent and, to a lesser extent, Moderate Regular Riders and is not statistically significant for Frequent Regular Riders.

Table 62: Extent to Which Riders Say They Like to Be Able to Say They Ride Metro by Area of Residence and Rider Status

Agree / Disagree: I like to be able to say I ride Metro

	Strongly Agree	
	2013	**2014**
Seattle / N. King	39%	51% (▲)
South King	46%	58% (▲)
East King	40%	61% (▲)

	Strongly Agree	
	2013	**2014**
REGULAR Riders	46%	57% (▲)
Frequent Regular Riders	48%	56%
Moderate Regular Riders	44%	61% (▲)
INFREQUENT Riders	32%	55% (▲)

High Value / Customer Focus

Provides Value

Nine of ten Riders continue to agree that Metro provides good value for the level of service it provides.

- The extent to which Riders strongly agree with this statement is consistent throughout the county and across the different rider segments.

Figure 56: Extent to Which Riders Agree / Disagree that Metro Provides Good Value for Service Provided

Agree / Disagree: Metro provides good value for service provided

	Disagree	Somewhat Agree	Strongly Agree
2014	-9 %	40 %	48 %
2013	-9 %	42 %	46 %

■ Disagree ■ Somewhat Agree ■ Strongly Agree

GW6   Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements. Would that be strongly or somewhat (agree/disagree)?

Base: Regular and Infrequent Riders; random selection of riders

	2013	2014
n	686	572
n_w	433	588
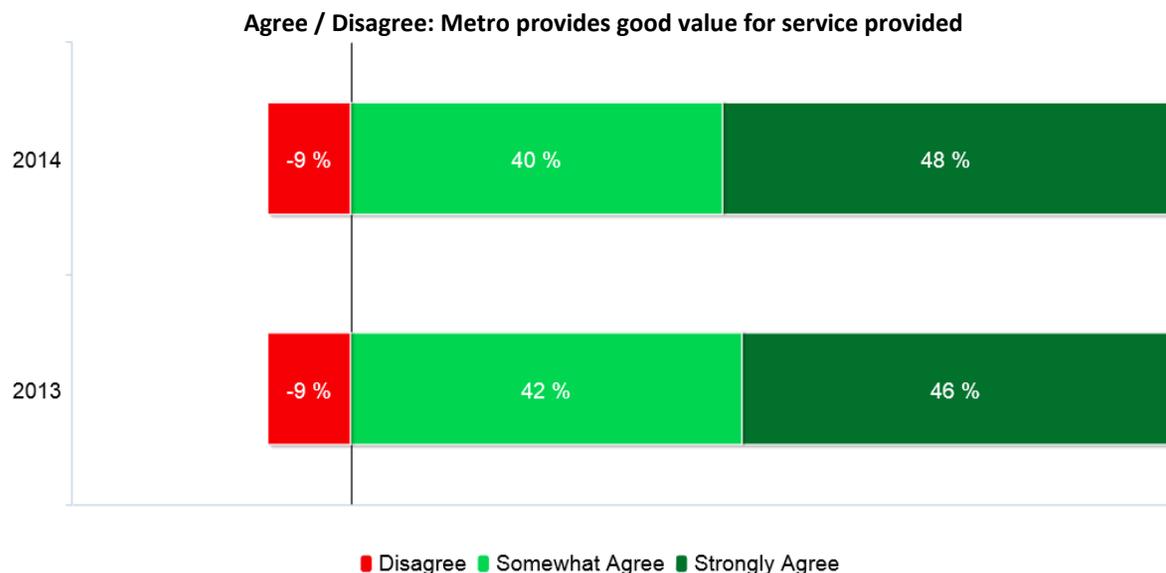
▲ / ▼ indicates a statistically significant change from previous year

Values Its Customers

Riders continue to agree that Metro values its customers. • This holds true within the different geographic subareas and for the different rider segments.	*Figure 57: Extent to Which Riders Agree / Disagree that Metro Values Its Customers* **Agree / Disagree: Metro values it customers**
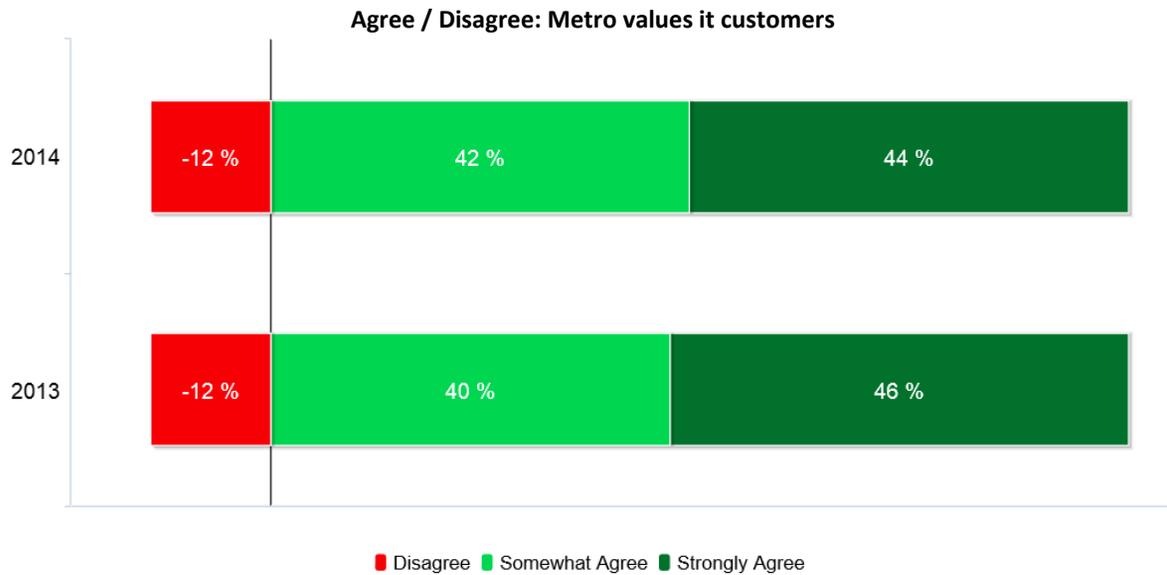
Excellent Customer Service

While the majority of Riders continue to agree that Metro provides excellent customer service, slightly more somewhat agree with this statement than strongly agree.

- There are no significant differences by geographic region or ridership.

Figure 58: Extent to Which Riders Agree / Disagree that Metro Provides Excellent Customer Service
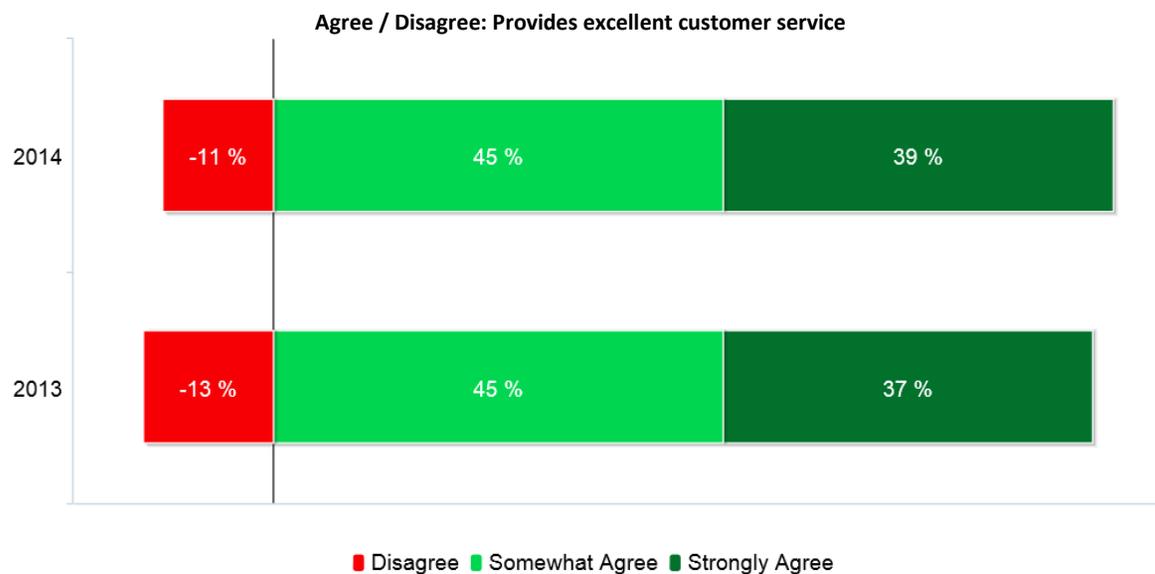
Agree / Disagree: Provides excellent customer service

| | Disagree | Somewhat Agree | Strongly Agree |

GW6   *Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements. Would that be strongly or somewhat (agree/disagree)?*
Base: Regular and Infrequent Riders; random selection of riders

	2013	2014
n	686	572
n$_w$	433	588

▲ / ▼ *indicates a statistically significant change from previous year*

High Quality Service Standards

Again, the majority of Riders continues to agree that Metro has consistently high standards for the quality of service it provides. However, significantly more somewhat agree than strongly agree with this statement.

- There has been a significant increase in the extent to which Infrequent Riders strongly agree with this statement.

Figure 59: Extent to Which Riders Agree / Disagree that Metro Has Consistently High Standards for Service

Agree / Disagree: Has consistently high standards for service

Year	Disagree	Somewhat Agree	Strongly Agree
2014	-13 %	48 %	37 %
2013	-16 %	49 %	34 %

■ Disagree ■ Somewhat Agree ■ Strongly Agree
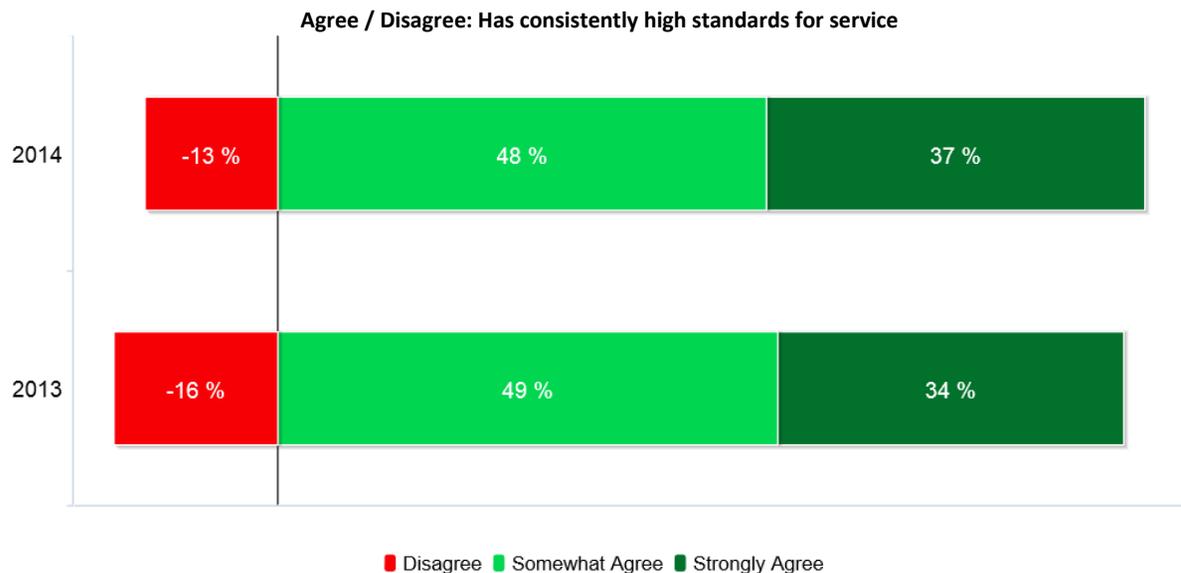
	Strongly Agree	
	2013	**2014**
REGULAR Riders	38%	36%
Frequent Regular Riders	39%	34%
Moderate Regular Riders	37%	40%
INFREQUENT Riders	27%	38% (▲)

GW6   Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements. Would that be strongly or somewhat (agree/disagree)?
Base: Regular and Infrequent Riders; random selection of riders

	2013	2014
n	686	572
nw	433	588

▲ / ▼ indicates a statistically significant change from previous year

Innovative

Riders are least likely to agree that Metro is innovative.

- Moreover, the extent to which Riders strongly agree with this statement decreased significantly in 2014, and the percentage that disagree increased.
- The decrease in strong agreement is greatest among Riders living in South King County and among Infrequent Riders.

Figure 60: Extent to Which Riders Agree / Disagree Metro Is Innovative

Agree / Disagree: Is innovative

	Disagree	Somewhat Agree	Strongly Agree
2014	-26 % (▲)	42 %	21 % (▼)
2013	-20 %	46 %	28 %

■ Disagree ■ Somewhat Agree ■ Strongly Agree
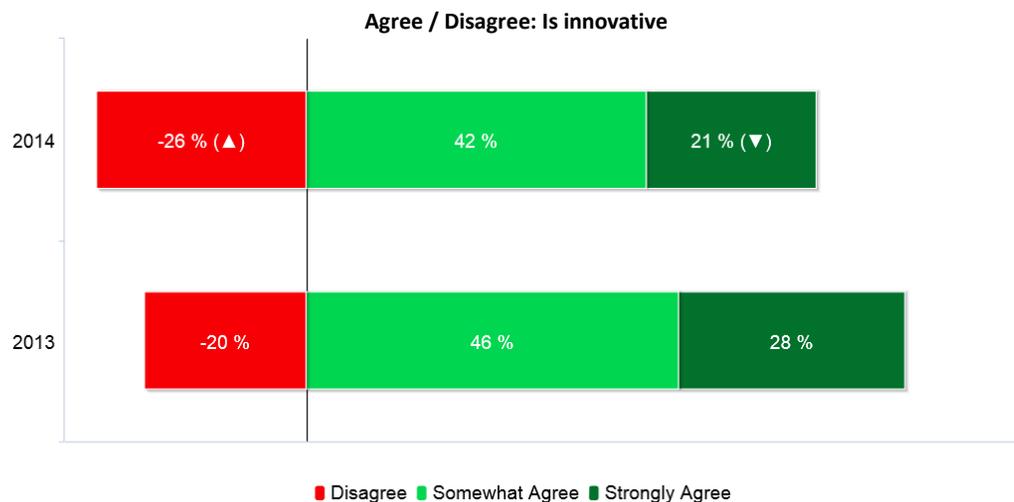
	Strongly Agree	
	2013	**2014**
Seattle / N. King	22%	18%
South King	38%	25% (▼)
East King	25%	21%

	Strongly Agree	
	2013	**2014**
REGULAR Riders	26%	24%
Frequent Regular Riders	24%	23%
Moderate Regular Riders	30%	28%
INFREQUENT Riders	30%	15% (▼)

GW6   *Based on anything you have seen, heard, or directly experienced, do you agree or disagree with each of the following statements?*
Base: Regular and Infrequent Riders; random selection of riders

	2013	2014
n	686	572
n_w	433	588

▲ / ▼ *indicates a statistically significant change from previous year*

Goodwill Index

External Influences / Agency Relations

In 2013, an index was created based on the extent to which External Influences, Perceived Benefits, and Agency Relations and Advocacy impacted rider satisfaction with and expectations of Metro. Some questions from 2013 were retained, but others were eliminated due to survey length. An updated Goodwill Index is created using the External Influence and Agency Relations and Advocacy variables used in both years. This analysis entailed three steps.

Step 1A: The first step in developing the index was to determine (using regression analysis) the extent to which each of the individual External Influences contributed to rider satisfaction with and expectations for Metro. An overall measure of the impact of External Influences was created using the extent to which two types of External Influences impact rider satisfaction with and expectations for Metro.

As noted earlier word of mouth and the media have different impacts on overall satisfaction with Metro and Riders' expectations. Word of mouth and the media have nearly equal impact on Riders' **combined** satisfaction with and expectations of Metro.	*Figure 61: Impact of External Influences on Riders' Satisfaction with and Expectations of Metro*
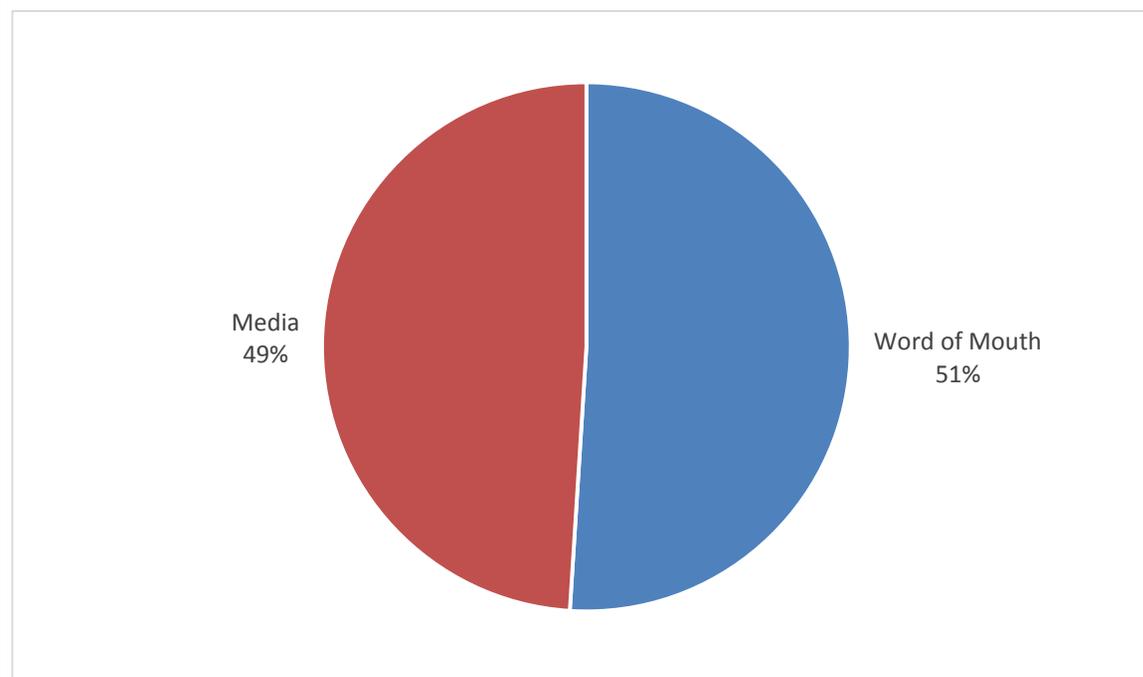
Step 1B: Similarly, the analysis estimated the extent to which the attributes "trust" and "like / respect" and "advocacy" contributed to rider satisfaction with and expectations for Metro. An overall measure of the impact of Agency Relations and Advocacy was created using the extent to which these aspects of Agency Relations and Advocacy impact Current and Lost Rider satisfaction with and expectations for Metro.

Among Current Riders, "trust" and "like and respect" for Metro have nearly the same impact on rider satisfaction with and expectations of Metro.	*Figure 62: Current Riders: Impact of Agency Relations and Advocacy on Riders' Satisfaction with and Expectations of Metro*
For Riders who stopped riding as a result of the service change (Lost Riders), the extent to which they "trust" Metro has a significantly greater impact on their satisfaction with and expectations of Metro than does "like and respect."	*Figure 63: Lost Riders: Impact of Agency Relations and Advocacy on Riders' Satisfaction with and Expectations of Metro*

Step 2: The second step in developing the index was to determine the extent to which the combination of External Influences and Agency Relations and Advocacy contributes to rider satisfaction with and expectations for Metro.

Agency Relations has twice the influence of External Influences on rider satisfaction with and expectations of Metro.	*Figure 64: Impact of External Influences and Agency Relations on Riders' Satisfaction with and Expectations of Metro*

External Influences 34%

Agency Relations 66%
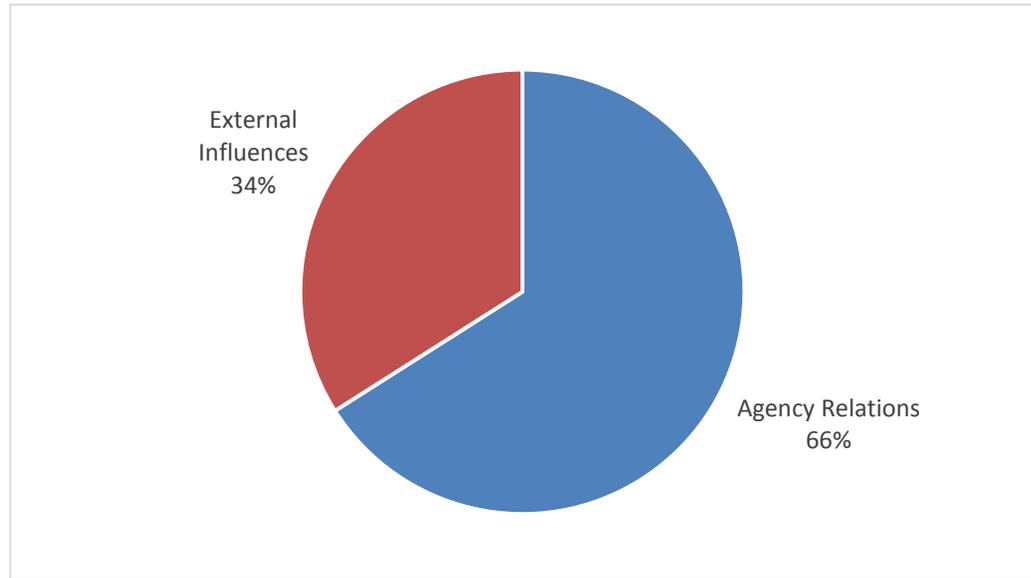
Step 3: The third stage of the analysis uses the weights developed in step 2 to create a weighted index of the combination of External Influences and Agency Relations / Advocacy on rider satisfaction with and expectations of Metro. The Goodwill Index is based on a 5-point scale where "1" represents "very low" goodwill and "5" represents "very high" goodwill.

Overall, Metro has a Goodwill Index of 3.91, suggesting a moderately high degree of goodwill.

- While the overall Goodwill Index decreased slightly between 2013 and 2014, this decrease is not statistically significant.

The 2014 Goodwill Index is nearly identical for Regular and Infrequent Riders.

- Among Regular Riders, notably Frequent Regular Riders, goodwill decreased between 2013 and 2014.
- The increase for Infrequent Riders is not statistically significant.

The 2014 Goodwill Index is significantly higher for Riders living in East King County than for those living in Seattle / North King County.

- No significant changes are found between 2013 and 2014 within each area.

Table 63: Goodwill Index

	2013	2014
ALL RIDERS	3.97	3.91
RIDER STATUS		
REGULAR RIDERS	4.06	3.90▼
FREQUENT REGULAR RIDERS	4.10	3.88▼
MODERATE REGULAR RIDERS	3.98	3.94
INFREQUENT RIDERS	3.80	3.92
AREA OF RESIDENCE		
SEATTLE / NORTH KING	3.94	3.78
SOUTH KING	3.96	3.90
EAST KING	4.08	4.07

Value / Customer Focus Index

A second index was created to assess the extent to which Riders' perceptions of Metro's Value and Customer Focus influences Riders' satisfaction with and expectations of Metro. Regression analysis was used to determine the extent to which the five questions related to the value of services Metro offers and whether the agency is customer focused impact Riders' overall satisfaction with and expectations of Metro.

Using the level of contribution of each of the individual variables, a Value / Customer Focus Index is derived. The Value / Customer Focus Index is based on a 5-point scale where "1" represents "very low" value and customer focus and "5" represents "very high" value and customer focus.

Three of the four Value and Customer Focus Attributes have nearly equal impact on rider satisfaction with and expectations of Metro.	*Figure 65: Impact of Perceived Value and Customer Focus on Riders' Satisfaction with and Expectations of Metro*

Pie chart:
- High standards for service 31%
- Innovative 30%
- Offers good value 28%
- Excellent customer service 11%
- Values its customers 0%
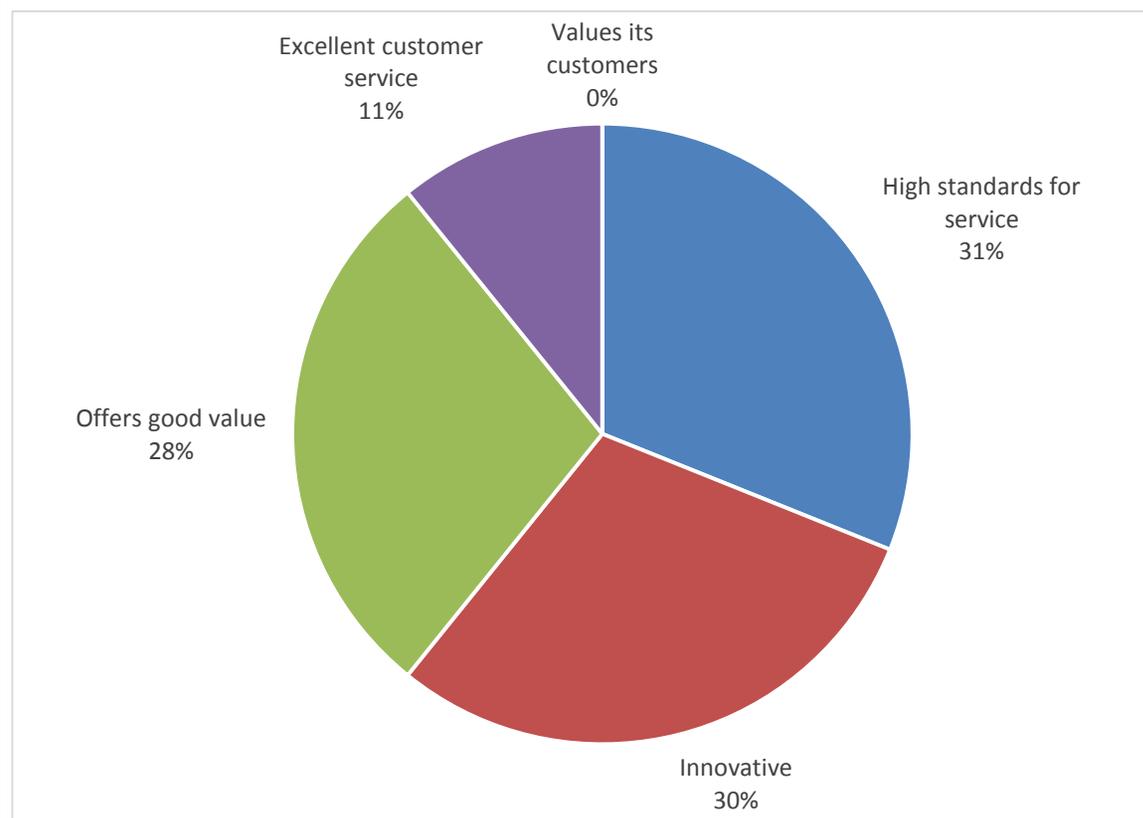
Overall Metro has a Value / Customer Focus Index of 3.22, suggesting an average degree of value and customer focus.

- The Value / Customer Focus Index has not changed from 2013.

The 2014 Value / Customer Focus Index is nearly identical for Regular and Infrequent Riders and for Frequent and Moderate Regular Riders.

- The Value / Customer Focus Index held steady for all rider segments.

Similarly, the Value / Customer Focus Index is the same across all areas of the county.

Table 64: Value and Customer Focus Index

	2013	2014
ALL RIDERS	3.20	3.22
RIDER STATUS		
REGULAR Riders	3.22	3.19
Frequent Regular Riders	3.20	3.18
Moderate Regular Riders	3.24	3.20
INFREQUENT Riders	3.16	3.27
AREA OF RESIDENCE		
SEATTLE / NORTH KING	3.14	3.17
SOUTH KING	3.25	3.24
EAST KING	3.30	3.24

FINDINGS: SERVICE QUALITY

Summary

Topic	What We Found				What It Means
Satisfaction with Overall Service Dimensions	Riders continue to be very satisfied with Fare Payment, Metro Drivers, and Sources of Information about Metro. • Satisfaction with Sources of Information about Metro increased in 2014. • Satisfaction with Metro Drivers decreased slightly. The percentage of Very Satisfied Riders increased significantly for Personal Safety. The percentage of Very Satisfied Riders decreased significantly for: • Transferring • Comfort and Cleanliness Onboard • Level of Service (LOS) • Park-and-Ride Lots		**% VERY SATISFIED**		It is clear that service changes enacted in September 2014 had an impact on Riders' satisfaction with many aspects of service, but notably for the Level of Service provided and Transferring. As later analysis indicates, these are the single most important aspects of Metro service.
			2013	**2014**	
		FARE PAYMENT	75%	76%	
		METRO DRIVERS	68%	65%▼	
		INFORMATION SOURCES	60%	66%▲	
		PERSONAL SAFETY	46%	50%▲	
		PARK-AND-RIDE LOTS	48%	42%▼	
		LEVEL OF SERVICE (LOS)	50%	41%▼	
		STOPS: COMFORT/ CLEANLINESS	38%	36%	
		ONBOARD: COMFORT / CLEANLINESS	43%	36%▼	
		TRANSFERRING	39%	30%▼	
		Significant change (▲) or (▼) from previous year			

Topic	What We Found				What It Means
Highest Rated Elements of Service (60%+ Very Satisfied)	Consistent with high ratings for the overall service dimensions, all aspects of Fare Payment and Information Sources are rated highly: • Satisfaction with the Ease of Paying Fares when Boarding increased significantly. Satisfaction with ORCA Cards also increased. • The Availability of Information on Metro Online increased significantly. • However, satisfaction with the Availability of Locations to Purchase Passes or Add Value to an E-Purse decreased. The increase in satisfaction for the Personal Safety dimension is due in part to a significant increase in Riders' satisfaction with Daytime Safety at Stops.		**% VERY SATISFIED**		The quality of Metro's fare payment system is evident in these high ratings, and continued innovation should be considered. At the same time, efforts should be made to make it easier for Riders to purchase passes or add value to their E-Purse either online or through more convenient fixed locations. Metro should continue to focus on providing quality and accurate information. Online sources—either developed by Metro or third-party sources—should be a priority. Metro should continue its focus on safety improvements, the recent success of which is evident here.
			2013	**2014**	
		FARE: ORCA CARDS	83%	87% ▲	
		FARE: EASE OF PAYING WHEN BOARDING	76%	81% ▲	
		FARE: EASE OF LOADING PASS	68%	76%	
		DRIVERS: OPERATE VEHICLES SAFELY	77%	74%	
		INFO: AVAILABILITY ONLINE	60%	71% ▲	
		SAFETY: DAYTIME AT STOPS	63%	70% ▲	
		FARE: EASE OF ADDING VALUE TO E-PURSE	71%	68%	
		DRIVERS: HELPFULNESS	64%	66%	
		INFO: OVERALL ABILITY TO OBTAIN	60%	63%	
		▲ / ▼ *indicates significant (95%) change from previous year* ▲ / ▼ *indicates significant (90%) change from previous year*			

Topic	What We Found	What It Means
Above-Average Ratings (50–59% Very Satisfied)	While satisfaction also improved for Daytime Safety Onboard Metro vehicles, Riders are less likely to be very satisfied with how well Drivers Handle Problems on the vehicles when they occur. Satisfaction with Distance from Home to Stop has decreased, notably among South King County Riders.	Additional training and support for drivers so they can effectively handle problems or incidents should be a continued focus. Particular attention should be on routes serving Seattle / North and South King County. Again, service changes made in September have affected riders who now have to walk further to a stop.

| | % VERY SATISFIED | |
	2013	2014
SAFETY: DAYTIME ONBOARD	51%	59% ▲
DRIVERS: HANDLE PROBLEMS	64%	55% ▼
FARE: LOCATIONS TO PURCHASE PASS / ADD VALUE TO E-PURSE	61%	54% ▼
LOS: DISTANCE FROM HOME TO STOP	64%	52% ▼
SAFETY: DT TRANSIT TUNNEL	48%	51%

Topic	What We Found	What It Means
Below-Average Ratings (40–49% Very Satisfied)	Most elements of service in this category (below-average) were in this same category of service in 2013. Several aspects of Park-and-Ride Lots (e.g., Lighting and Personal Safety) moved from having above-average ratings to now having below-average ratings, due to somewhat lower percentages of very satisfied users. Satisfaction decreased for all elements of service within the Level of Service dimension. The decrease is greatest for Availability of Service.	Lighting and Personal Safety at Park-and-Ride Lots are related, and ratings for these two elements of service decreased. Increased lighting at park-and-ride lots identified as having little or no lighting as well as those with a higher number of reported security incidents could move these two elements of service back into a potential strength. Ratings for Level of Service could only improve if service is restored.

| | % VERY SATISFIED | |
	2013	2014
P&R LOTS: LIGHTING	54%	48%
ONBOARD: CLEANLINESS	46%	47%
P&R LOTS: PERSONAL SAFETY	52%	46%
STOPS: LOADING / UNLOADING DUE TO CROWDING	49%	45%
INFO: AVAILABILITY AT STOPS	n.a.	45%
LOS: ON-TIME PERFORMANCE	46%	41% ▼
LOS: TRAVEL TIME	43%	41%
STOPS: CLEANLINESS	38%	41%
LOS: AVAILABILITY OF SERVICE	51%	40% ▼
ONBOARD: AVAILABILITY OF SEATING	47%	40%
P&R LOTS: VEHICLE SECURITY	44%	40%

Topic	What We Found	What It Means

Lowest Rated Elements of Service (<40% Very Satisfied)

Onboard Safety After Dark and At Stops continue to be two of the lowest rated elements of service.

- However, satisfaction with Onboard Safety after Dark has increased significantly.
- While overall satisfaction with Safety at Stops after Dark did not change, the percent of Seattle / North King County Riders very satisfied with this element of service decreased significantly.

Overcrowding on Buses continues to be the element of service with which Riders are least satisfied.

- Satisfaction with all elements of service related to crowding on the vehicles has decreased, notably on routes serving Seattle / North King County.

Transferring, notably Wait Times when Transferring, also continues to be an area with low levels of satisfaction.

	% VERY SATISFIED	
	2013	2014
SAFETY: ONBOARD AFTER DARK	30%	37% ▲
ONBOARD: LOADING / UNLOADING DUE TO CROWDING	48%	36% ▼
LOS: FREQUENCY OF SERVICE	45%	36% ▼
TRANSFERS: NUMBER	44%	35% ▼
STOPS: AVAILABILITY OF SHELTERS	33%	35%
P&R LOTS: PARKING AVAILABILITY	45%	34% ▼
STOPS: LIGHTING	33%	33%
STOPS: AVAILABILITY OF SEATING	35%	29% ▼
SAFETY: AT STOPS AFTER DARK	31%	28%
TRANSFERS: WAIT TIME	35%	26% ▼
ONBOARD: OVERCROWDING	29%	21% ▼

Metro should continue to focus its efforts on safety after. Particular focus should be on stops in downtown Seattle and other high-ridership areas in Seattle / North King County.

Reduction in service in areas with high ridership aggravates the crowding issue.

While more riders report having direct service, those who have to transfer are increasingly dissatisfied. Riders living in South King County continue to be the most likely to take trips that require a transfer, and reported wait times are longer for these riders.

Key Drivers Analysis

This survey asked riders about their satisfaction with 36 service elements. Statistical analysis was used to group these service elements into nine Overall Service Dimensions, and to identify the importance of these Overall Service Dimensions and the individual service elements, in determining Rider satisfaction with and expectations of Metro. This summary table is ordered based on the importance of the Overall Service Dimension followed by the importance of the elements of service.

Level of Service (LOS) and Transferring continue to be the most important determinants of Riders' satisfaction with and expectations of Metro. Level of Service is more important than Transferring.

- With the exception of Distance from Home to Stop, all elements of service within the LOS dimension receive below-average satisfaction ratings.

Personal Safety is the third most important service dimension.

- While satisfaction has improved, Safety after Dark is still a concern.

Comfort and Cleanliness At Stops and, to a lesser extent, Onboard are also important service dimensions.

- All elements of service within the Comfort and Cleanliness at Stops Dimension receive below-average ratings.

High Importance / Below-Average Satisfaction: Improve	Imp. Rank	% Very Satisfied
Level of Service (LOS)		
• Travel Time	1	41%
• Availability	2	40%
• Frequency	3	36%
• On-Time	4	41%
Transferring		
• Wait Time	1	26%
• Number	2	35%
Personal Safety		
• Stops: Dark	2	28%
• Onboard: Dark	3	37%
Comfort and Cleanliness at Stops		
• Loading/unloading	1	45%
• Lighting	3	33%
• Shelters	2	35%
• Cleanliness	4	41%
• Seating	5	29%
Comfort and Cleanliness Onboard		
• Cleanliness	1	47%
• Crowding	2	21%
• Loading/Unloading	3	36%
Information		
• At Stops	2	45%
High Importance / Above-Average Satisfaction: Maintain		
Level of Service		
• Distance to Stop	5	52%
Personal Safety		
• Stops: Daytime	4	70%
• Onboard: Daytime	1	59%
Drivers		
• Handling Problems	1	55%

Depending on funding and revenues, restoration of service and, where possible, additional service should be a priority.

- The focus should be on Travel Time (the most important element of service) and Frequency of Service (lowest rated).
- Restored or new service to support heavily traveled routes will also address crowding issues.

While continuing to provide more direct service through routes such as the RapidRide or other express services is good, improved scheduling for routes with known links to others to decrease transfer wait times should also be a priority.

Metro should continue its ongoing efforts to improve safety. While the focus should be nighttime safety, daytime safety should not be ignored.

Adding shelters and/or seating at stops should continue to be a priority. Improved lighting can partially address safety concerns with waiting after dark.

Continuing to improve signage at stops, particularly if printed timetables are no longer available, should be an area for improvement.

Overview of Service Quality Analysis

Factor analysis was originally used to identify nine primary dimensions of service that contain elements of service that correlate with these overall dimensions. The dimensions represent the broad categories on which Riders evaluate quality of service.

The nine dimensions and elements of service included in each dimension for 2014 are illustrated below. Note that to minimize survey length, the number of service elements within each dimension was reduced, and in 2014 the focus is on those elements of service that were identified as key drivers of overall satisfaction with and expectations of Metro in prior years.

Dimension	Elements of Service Included	
Level of Service	Frequency of Service On-Time Performance Availability of Service (where you need to travel)	Travel Time Distance from Home to Stop
Transferring	Number of Transfers	Wait Time when Transferring
Comfort and Cleanliness Onboard	Inside Cleanliness Availability of Seating	Overcrowding Ease of Loading / Unloading (due to crowding)
Comfort and Cleanliness at Stops	Cleanliness of Shelters and Stops Availability of Seating (at shelters and stops) Amount of Lighting (at shelters and stops)	Availability of Shelters Stops Ease of Loading / Unloading (due to crowding)
Personal Safety	Daytime Safety Onboard Daytime Safety at Stops Onboard Safety after Dark	Safety at Stops after Dark Safety in Downtown Transit Tunnel
Metro Drivers	Helpfulness (with route and stop information) Operate Vehicles Safely	Effectively Handle Problems (on vehicles)
Fare Payment	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 to E-Purse
Information Sources	Overall Ability to Get Information Availability of Information on Metro Online	Availability of Information at Stops (new in 2014)
Park-and-Ride Lots	Ability to Get a Parking Space Personal Safety	Vehicle Security Lighting

For the report, analysis of service quality consists of three stages:

1. A summary of the results for 2014
2. A review of changes in ratings between 2013 and 2014, overall and for key subgroups (area of residence and rider status)
3. Key Drivers Analysis to identify priorities for improvements

Key Drivers Analysis is used to derive the importance of the individual elements of service. Derived importance measures are arrived at through statistically testing the influence of the individual elements of service on overall satisfaction with and expectations of Metro. Derived importance can help provide further understanding of the underlying factors driving overall customer satisfaction and perceptions that a respondent may not explicitly state.

For this analysis, individual service elements were modeled as predictors that influence overall satisfaction with and expectations of Metro. A weighted index of overall satisfaction (Question GW1) and rider expectations of Metro (Question GW7) was developed to serve as the dependent variable. A multiple regression model was used to estimate the derived importance coefficients, with larger coefficients having a greater influence on regional satisfaction.

The analysis is done initially to determine which of the overall dimensions of service contribute to customers' overall satisfaction with and expectations of Metro. Subsequent analysis then looks at the extent to which the individual elements of service within each overall dimension contribute to customers' overall satisfaction with and expectations of Metro. Thus, an individual element of service may be a key driver when the overall dimension is not or vice versa.

Overall dimensions and the individual elements of service are then placed into one of four quadrants and corresponding strategies:

1. **High Importance / Above-Average Satisfaction:** Elements of service that are identified as key drivers of customers' overall satisfaction with and expectations of Metro, and the percentage of Very Satisfied Riders is 50% or higher. **Strategy:** Maintain existing levels of service.
2. **High Importance / Below-Average Satisfaction:** Elements of service that are identified as key drivers of customers' overall satisfaction with and expectations of Metro, and the percentage of Very Satisfied Riders is less than 50%. **Strategy:** Improve existing levels of service.
3. **Low Importance / Below-Average Satisfaction:** Elements of service that are *not* key drivers of customers' overall satisfaction with and expectations of Metro, and the percentage of Very Satisfied Riders is less than 50%. **Strategy:** Strategically target.
4. **Low Importance / Above-Average Satisfaction:** Elements of service that are *not* key drivers of customers' overall satisfaction with and expectations of Metro, and the percentage of Very Satisfied Riders is 50% or higher. **Strategy:** Monitor.

Performance on Overall Service Dimensions

Ratings 2014

Overall satisfaction with each of the nine service dimensions was computed by computing the average satisfaction ratings for each major response category (very satisfied, somewhat satisfied, dissatisfied) across all elements of service within each dimension.

The majority of Riders are "very" or "somewhat satisfied" with all major service dimensions.

Riders are most satisfied (50% or more "very satisfied") with:

- Fare payment
- Metro Drivers
- Information Sources
- Personal Safety

Riders are least satisfied (less than 50% very satisfied) with:

- Transferring
- Comfort and Cleanliness Onboard and at Stops
- Level of Service
- Park-and-Ride Lots

Figure 66: Overall Service Dimensions: Ratings for Quality of Service 2014
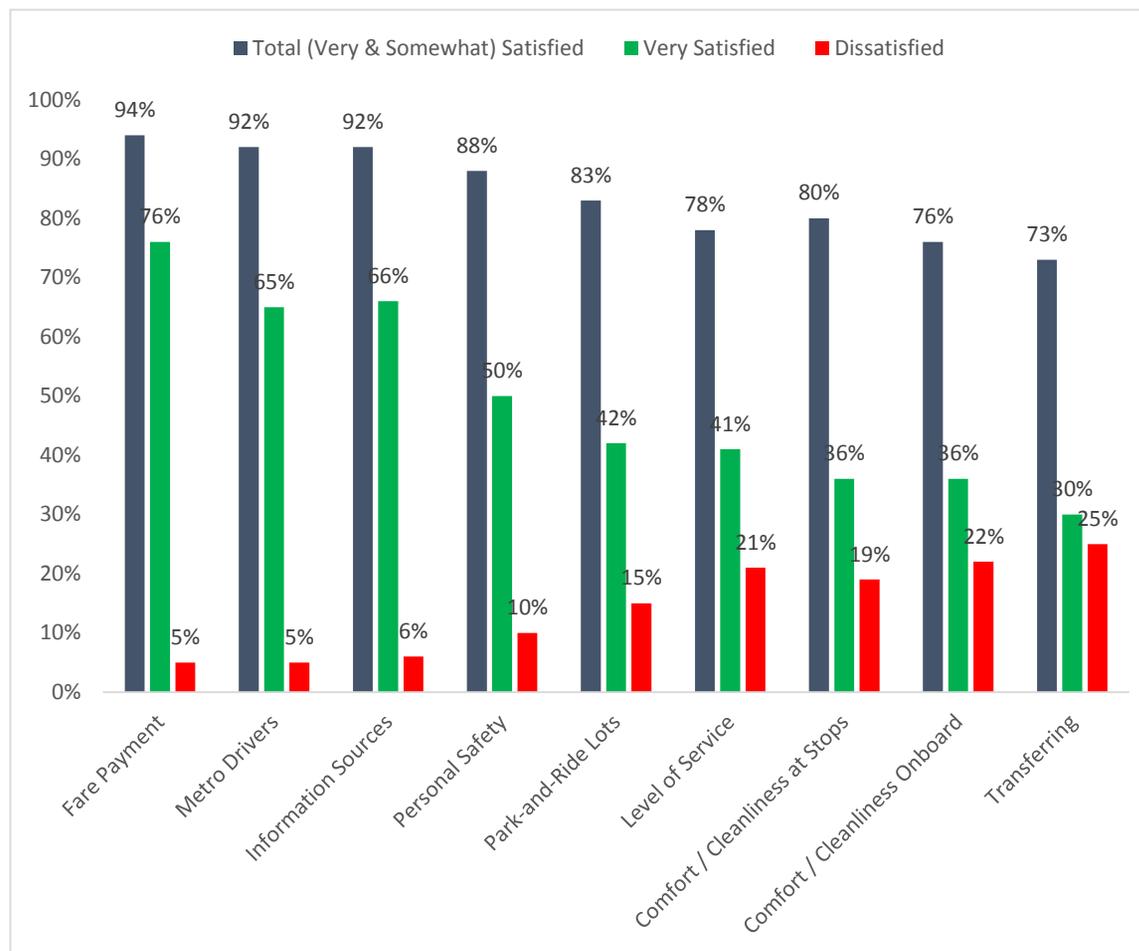
	n	n_w
Level of Service, Personal Safety, Fare Payment	1,102	1,161
Transferring (Rides Who Transfer)	429	444
Park-and-Ride Lots (Used In Past Year)	472	543
Comfort / Cleanliness Stops / Onboard	525	571
Drivers, Information Sources	577	587

Changes in Ratings 2013–2014

Total satisfaction ratings (combined very and somewhat satisfied) remained unchanged for the highest rated service dimensions (those with greater than 80% total satisfied).

- The percentage very satisfied increased significantly for Information Sources and Personal Safety.
- The percentage very satisfied decreased significantly for Metro Drivers.

Total satisfaction increased for Comfort and Cleanliness at Stops.

- There was no significant change in the percentage very satisfied with this service dimension.

Total satisfied and percent very satisfied decreased significantly for:

- Level of Service
- Comfort and Cleanliness Onboard
- Transferring

The decrease in the percentage very satisfied is greatest for Transferring.

DIMENSION	TOTAL (VERY & SOMEWHAT) SATISFIED		VERY SATISFIED	
	2013	2014	2013	2014
FARE PAYMENT	94%	94%	75%	76%
METRO DRIVERS	91%	92%	68%	65%▼
INFORMATION SOURCES	95%	95%	60%	66%▲
PERSONAL SAFETY	86%	88%	46%	50%▲
PARK-AND-RIDE LOTS	85%	83%	48%	42%▼
LEVEL OF SERVICE	85%	78%▼	50%	41%▼
COMFORT / CLEANLINESS AT STOPS	77%	80%▲	38%	36%
COMFORT / CLEANLINESS ONBOARD	83%	76%▼	43%	36%▼
TRANSFERRING	77%	73%▼	39%	30%▼

▲ / ▼ *indicates a statistically significant change from previous year*

Key Drivers

Of the nine overall service dimensions all but two—Park-and-Ride Lots and Fare Payment—are significant contributors to riders' overall satisfaction with and expectations of Metro. (Only significant contributors are shown in the graph).

The Level of Service dimension is by far the largest contributor to customers' overall satisfaction with and expectations of Metro.

- This has been the most important dimension of service over the years. However, the very high impact of this dimension in 2014 most likely reflects the service changes which occurred immediately before the 2014 survey period.

Personal Safety continues to be the next most important contributor to customers' overall satisfaction with and expectations of Metro, followed by Comfort and Cleanliness (at Stops and Onboard combined).

- Comfort and Cleanliness at Stops is nearly three times as important as Comfort and Cleanliness Onboard.

Information Sources and Metro Drivers represent the fourth set of contributors, followed by Transferring.

Figure 67: Overall Service Dimensions: Key Drivers

Transferring 8%
Metro Drivers 11%
Information Sources 11%
Comfort / Cleanliness Onboard 4%
Comfort / Cleanliness at Stops 11%
Personal Safety 18%
Level of Service 37%
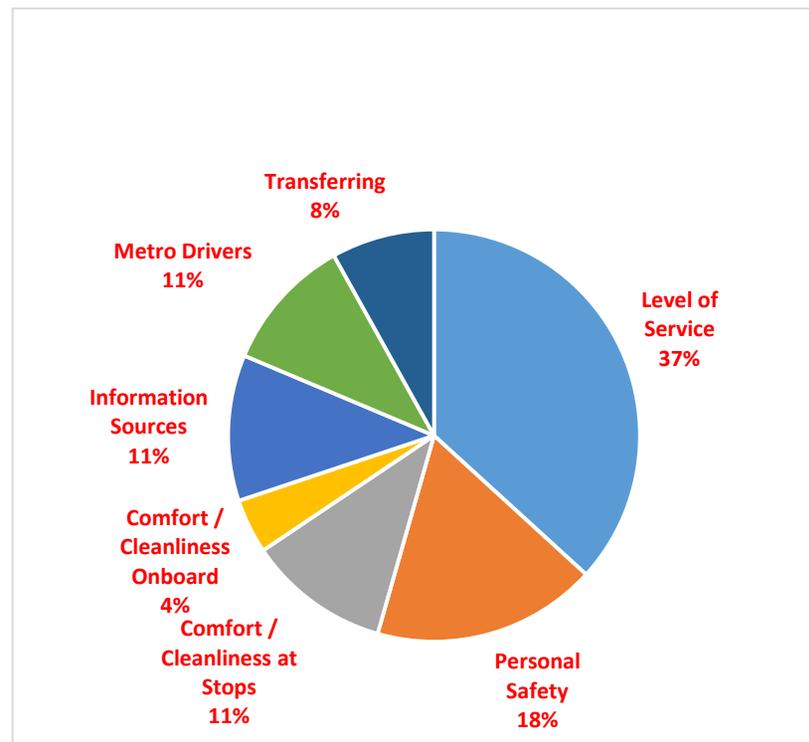
Four areas are identified as priority areas:

- **Level of Service:** This should be a countywide priority.
- **Transferring**: This should be a priority for routes serving South King County.
- **Comfort and Cleanliness at Stops**: This should be a priority for routes serving Seattle / North King County
- **Comfort and Cleanliness Onboard**: This also should be a priority for routes serving Seattle / North King County.

Improvements for Personal Safety (discussed in detail in subsequent sections) have resulted in a move from a high priority (Improve quadrant) to the Maintain quadrant. Given its high importance and the fact that the 50 percent very satisfied rating puts this on the margin between Maintain and High Priority, Metro should continue to focus on Personal Safety as well.

Figure 68: Overall Service Dimensions: Performance on Key Drivers

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
Drivers	65%	Level Service	41%
Information Sources	60%	Comfort / Cleanliness at Stops	36%
Personal Safety	50%	Comfort / Cleanliness Onboard	36%
		Transferring	30%
Low Importance / Above-Average Satisfaction Monitor		**Low Importance / Below-Average Satisfaction Strategically Target**	
	% Very Satisfied		% Very Satisfied
Fare Payment	76%	Park-and-Ride Lots	42%

Level of Service

Ratings 2014

Nearly four out of five Riders are currently satisfied with the Level of Service provided by Metro.

- Two out of five Riders are very satisfied with the Level of Service provided by Metro.

Ratings for the individual elements of service in this dimension are relatively consistent.

- Riders are most satisfied with Distance from Home to Stop.
- They are least satisfied with Availability of Service.

Figure 69: Level of Service: Ratings for Quality of Service 2014

Level of Service: Total Satisfied				
78%				
(a) Distance Home to Stop	(b) On-Time Performance	(c) Travel Time	(d) Frequency of Service	(e) Availability of Service
83% (d▲,e▲)	81% (d▲,e▲)	80% (e▲)	77% (a▼,b▼)	75% (a▼,b▼,c▼)
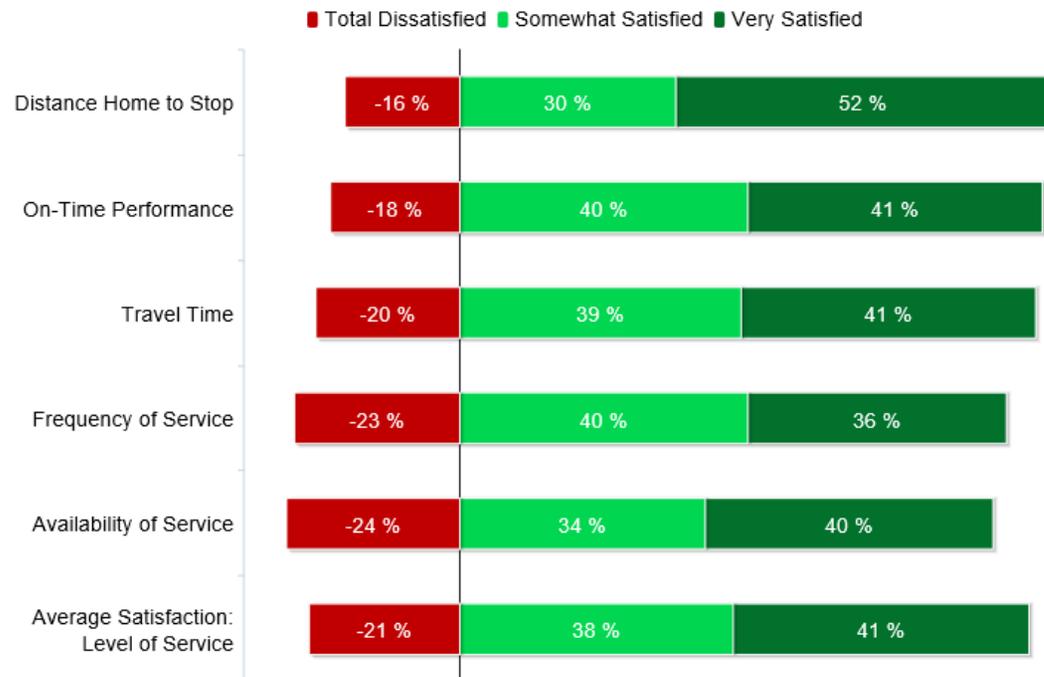
Total Satisfied (Very & Somewhat) shown in left label column.

Legend: ■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

Element	Total Dissatisfied	Somewhat Satisfied	Very Satisfied
Distance Home to Stop	-16 %	30 %	52 %
On-Time Performance	-18 %	40 %	41 %
Travel Time	-20 %	39 %	41 %
Frequency of Service	-23 %	40 %	36 %
Availability of Service	-24 %	34 %	40 %
Average Satisfaction: Level of Service	-21 %	38 %	41 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
        The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Base: Regular and Infrequent Riders

	n	nw
2014	1,102	1,161

Changes in Ratings 2013–2014

Riders' satisfaction with Level of Service decreased in 2014. The decrease in total satisfaction (percentage very and somewhat satisfied) with Level of Service is significant for all aspects of service except for:

- On-Time Performance.

Looking only at Very Satisfied Riders, the percentage of very satisfied ratings decreased for all elements of service except Travel Time. The decrease in satisfaction is greatest for two related elements:

- Distance from Home to Stop
- Availability of Service

Figure 70: Level of Service: Changes in Ratings 2013–2014

Level of Service: Total Satisfied	
2013	85%
2014	78% (▼)

	Distance Home to Stop	On-Time Performance	Travel Time	Frequency of Service	Availability of Service
Total Satisfied (Very & Somewhat) 2013	88%	85%	86%	83%	84%
Total Satisfied (Very & Somewhat) 2014	83% (▼)	81%	80% (▼)	77% (▼)	75% (▼)
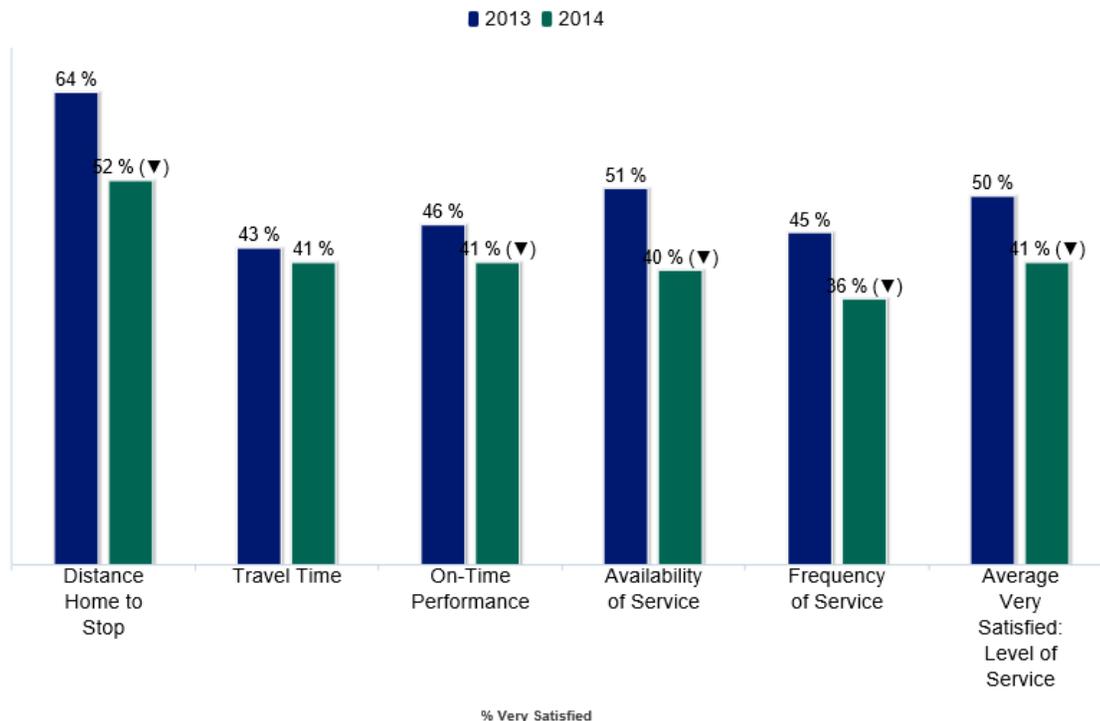
Base: Regular and Infrequent Riders; ▲ / ▼ indicates a statistically significant change from previous year

	2013	2014
n	1,395	1,102
n_w	1,395	1,161

The percentage of Riders very satisfied with Level of Service decreased in all areas of the county but is significant in Seattle / North and South King County.

Among Seattle / North King County Riders, the percentage of Very Satisfied Riders decreased for:

- Availability of Service
- Frequency of Service
- Travel Time
- Distance from Home to Stop

Among South King County Riders, the percentage of Very Satisfied Riders decreased for:

- Distance from Home to Stop
- Frequency of Service
- On-Time Performance
- Availability of Service

Table 65: Level of Service: Changes in Percentage Very Satisfied by Area of Residence

| | Very Satisfied | | | | | |
| | Seattle / North King | | South King | | East King | |
	2013	2014	2013	2014	2013	2014
Average: Level of Service	49%	38% (▼)	52%	43% (▼)	48%	43%
On-Time Performance	37%	34%	57%	45% (▼)	55%	44%
Availability of Service	53%	39% (▼)	50%	41% (▼)	45%	42%
Travel Time	42%	34% (▼)	40%	45%	49%	45%
Frequency of Service	43%	31% (▼)	55%	42% (▼)	36%	37%
Distance Home to Stop	71%	62% (▼)	56%	43% (▼)	54%	50%

The percentage of Riders very satisfied with Level of Service decreased for both Regular and Infrequent Riders.

Among Regular Riders, the percentage very satisfied decreased for:

- Distance from Home to Stop
- Frequency of Service

Among Infrequent Riders, the percentage very satisfied decreased for:

- Availability of Service

Table 66: Level of Service: Changes in Percentage Very Satisfied by Rider Status

| | Very Satisfied | | | |
| | REGULAR Riders | | INFREQUENT Riders | |
	2013	2014	2013	2014
Average: Level of Service	48%	39% (▼)	52%	43% (▼)
On-Time Performance	40%	35%	56%	49%
Availability of Service	49%	43%	53%	36% (▼)
Travel Time	41%	39%	46%	43%
Frequency of Service	45%	35% (▼)	45%	39%
Distance Home to Stop	65%	51% (▼)	62%	55%

Key Drivers Analysis

All five elements of service within the Level of Service dimension are significant contributors to Riders' overall satisfaction with and expectations of Metro.

- Travel Time and Availability of Service are the largest contributors.
- Frequency of Service and On-Time Performance represent a second tier of contributors.
- Distance from Home to Stop is important but significantly less so than the other four contributors.

With the exception of Distance from Home to Stop, less than 50 percent of all riders are very satisfied with the elements of service in the Level of Service dimension. Just over half are very satisfied with Distance from Home to Stop.

Given the high importance attributed to the overall Level of Service dimension, all individual elements of service should be considered priorities. However, the top priorities should be:

- Frequency of Service in Seattle / North King and East King County
- Availability of Service in East King County

Figure 71: Level of Service: Key Drivers
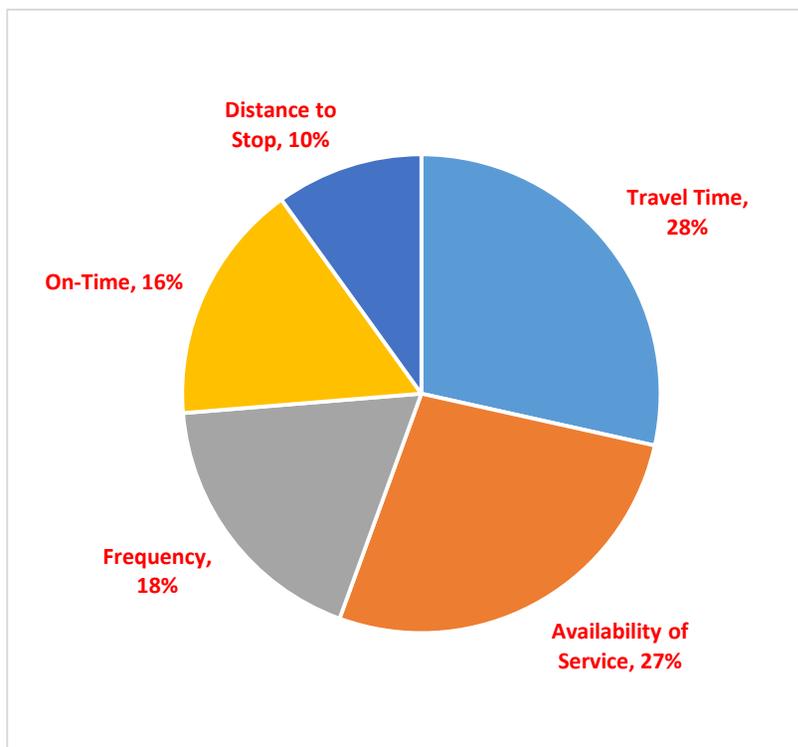
Figure 72: Level of Service: Performance on Key Drivers

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
		Travel Time	41%
		On-Time Performance	41%
Distance Home to Stop	52%	Availability of Service	40%
		Frequency of Service	36%

Transferring

Ratings 2014

Slightly less than three out of four Riders are satisfied with Transferring.

- Moreover, more Riders are somewhat satisfied with Transferring as opposed to very satisfied.

One out of four Riders who transfer are dissatisfied.

- This is highest percentage dissatisfied across all of the overall service dimensions.

While there is no significant difference in total satisfaction, a significantly greater percentage of Riders are very satisfied with the Number of Transfers compared to Wait Time when Transferring.

- In addition, dissatisfaction with Wait Time when Transferring is greater than for Number of Transfers.

Figure 73: Transferring: Ratings for Quality of Service 2014
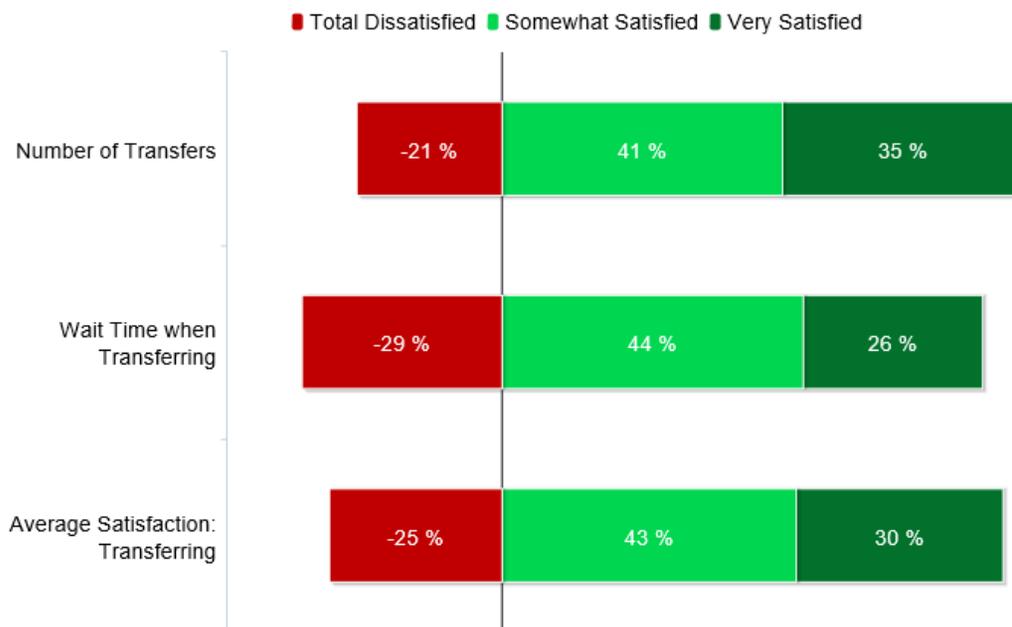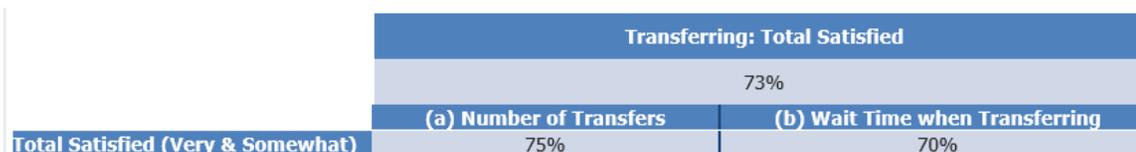
	Transferring: Total Satisfied	
	73%	
	(a) Number of Transfers	(b) Wait Time when Transferring
Total Satisfied (Very & Somewhat)	75%	70%

Legend: ■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

	Total Dissatisfied	Somewhat Satisfied	Very Satisfied
Number of Transfers	-21 %	41 %	35 %
Wait Time when Transferring	-29 %	44 %	26 %
Average Satisfaction: Transferring	-25 %	43 %	30 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Base: Regular and Infrequent Riders who transfer

	n	n$_w$
2014	429	444

Changes in Ratings 2013–2014

Riders' total satisfaction with Transferring decreased in 2014.

While the decrease in total satisfaction is not significant for either of the two elements of service, the decrease in the percentage very satisfied is significant for both elements of transferring.

- The decrease is greatest for Wait Time when Transferring.

Figure 74: Transferring: Changes in Satisfaction Ratings 2013–2014

	Transferring: Total Satisfied
2013	77%
2014	73% (▼)

		Number of Transfers	Wait Time when Transferring
Total Satisfied (Very & Somewhat)	2013	81%	74%
	2014	75%	70%

■ 2013 ■ 2014

Number of Transfers: 44 % / 35 % (▼)
Wait Time when Transferring: 35 % / 26 % (▼)
Average Very Satisfied: Transferring: 39 % / 30 % (▼)

% Very Satisfied

Base: Regular and Infrequent Riders who transfer

	2013	2014
N	708	429
n_w	461	444

▲ / ▼ *indicates a statistically significant change from previous year*

The percentage of Riders very satisfied with Transferring decreased in South King County and, to a lesser extent, Seattle / North King County.

- In South King County, the percentage very satisfied decreased significantly for both elements of Transferring.
- In Seattle / North King County, the percentage very satisfied with the individual elements of Transferring also decreased, but the decreases are not statistically significant. Instead it is the combination of the two that leads to the overall decrease in satisfaction with transferring in this part of the county.

Table 67: Transferring: Changes in Very Satisfied Ratings by Area of Residence

| | Very Satisfied | | | | | |
| | Seattle / North King | | South King | | East King | |
	2013	2014	2013	2014	2013	2014
Average: Transferring	37%	29% (▼)	46%	32% (▼)	30%	29%
Number of Transfers	40%	34%	50%	36% (▼)	36%	34%
Wait Time when Transferring	33%	24%	41%	29% (▼)	24%	25%

The percentage of Very Satisfied Infrequent Riders decreased significantly.

- The decrease is somewhat greater for Number of Transfers.

Table 68: Transferring: Changes in Very Satisfied Ratings by Rider Status

| | Very Satisfied | | | |
| | REGULAR Riders | | INFREQUENT Riders | |
	2013	2014	2013	2014
Average: Transferring	36%	32%	45%	26% (▼)
Number of Transfers	42%	38%	46%	26% (▼)
Wait Time when Transferring	30%	26%	44%	26% (▼)

Key Drivers Analysis

For those whose usual trip requires a transfer, both Wait Time when Transferring and Number of Transfers are significant contributors to their overall satisfaction with and expectations of Metro. • Wait Time is more important than Number of Transfers.	As noted earlier, out of all elements of service, Riders give the lowest ratings to both aspects of Transferring. • Routes originating in South King County should be a priority.
Figure 75: Transferring: Key Drivers	*Figure 76: Transferring: Performance on Key Drivers*
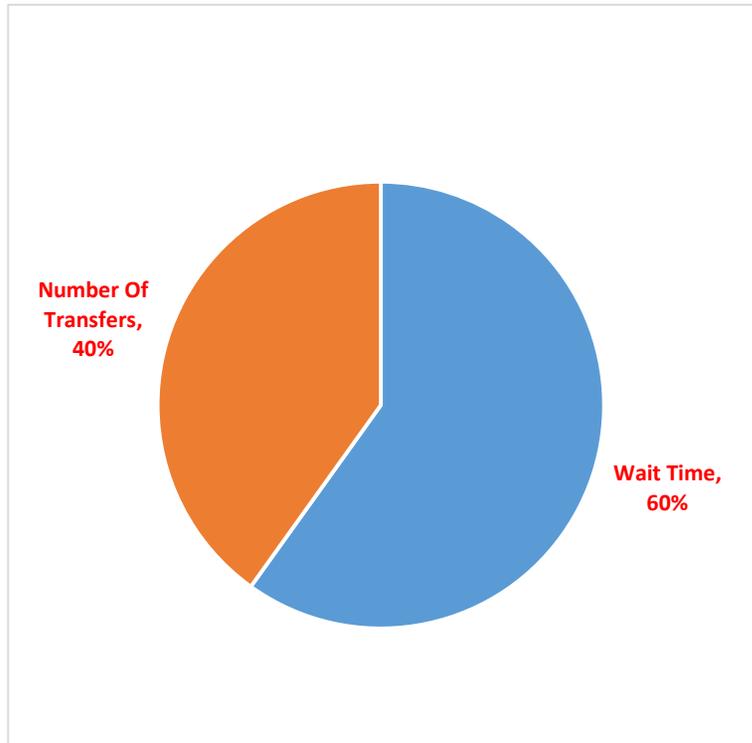
Figure 75:

Number Of Transfers, 40%

Wait Time, 60%

Figure 76:

High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied
Number of Transfers	35%
Wait Time when Transferring	27%

Personal Safety

Ratings 2014

Nearly nine out of ten Riders are satisfied with Personal Safety.

- Half are very satisfied.

Riders are significantly more satisfied with Daytime Safety than with Safety after Dark.

- Riders are also more likely to be very satisfied with Daytime Safety at Stops than Onboard.
- The reverse is true for Safety After Dark.

Figure 77: Personal Safety: Ratings for Quality of Service 2014

				Personal Safety: Total Satisfied		
				88%		
	(a) At Stops: Daytime	**(b) Onboard: Daytime**	**(c) DT Transit Tunnel**	**(d) Onboard: After Dark**	**(e) At Stops : After Dark**
Total Satisfied (Very & Somewhat)	95% (c▲,d▲,e▲)	94% (c▲,d▲,e▲)	90% (a▼,b▼,d▲,e▲)	80% (a▼,b▼,c▼)	78% (a▼,b▼,c▼)
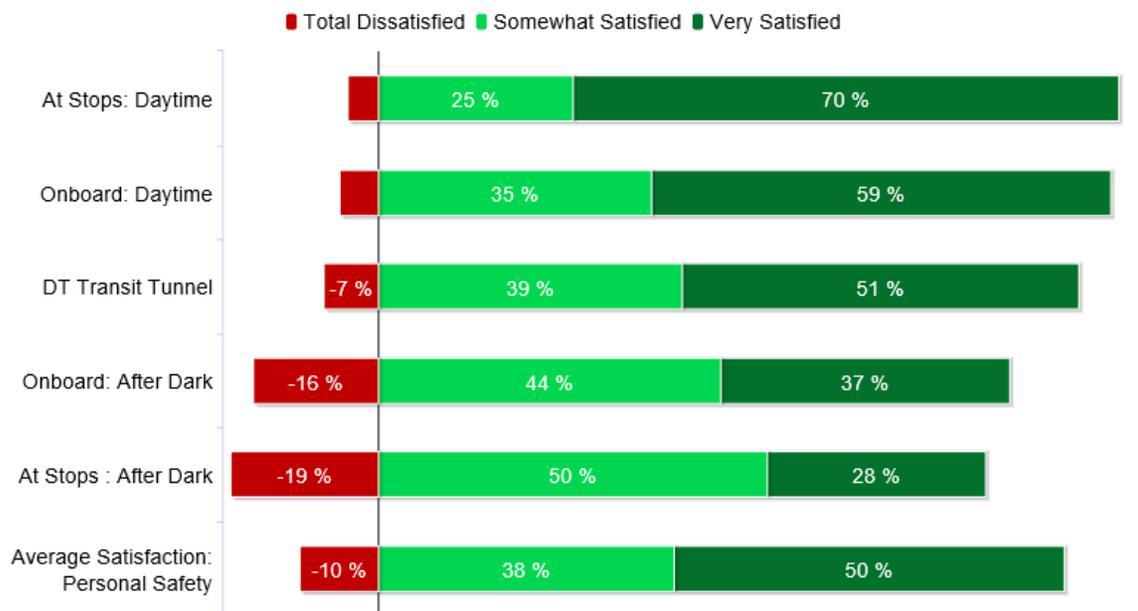
■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

	Total Dissatisfied	Somewhat Satisfied	Very Satisfied
At Stops: Daytime		25 %	70 %
Onboard: Daytime		35 %	59 %
DT Transit Tunnel	-7 %	39 %	51 %
Onboard: After Dark	-16 %	44 %	37 %
At Stops : After Dark	-19 %	50 %	28 %
Average Satisfaction: Personal Safety	-10 %	38 %	50 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Small percentages (<10%) do not show on graph
Base: Regular and Infrequent Riders

	n	n_w
2014	1,102	1,161

Changes in Ratings 2013–2014

While total satisfaction with Personal Safety did not change, total satisfaction increased significantly for.

- Daytime Safety Onboard
- Safety in the Downtown Transit Tunnel

The percentage of Riders very satisfied increased for both elements of Daytime Safety.

- The increase is greatest for Daytime Safety Onboard.

The percentage of Riders very satisfied for Safety Onboard after Dark also increased significantly.

Safety at Stops after Dark continues to be the lowest rated element of service.

Figure 78: Personal Safety: Changes in Ratings 2013–2014

	Personal Safety: Total Satisfied	
2013	86%	
2014	88%	

		At Stops: Daytime	Onboard: Daytime	DT Transit Tunnel	Onboard: After Dark	At Stops : After Dark
Total Satisfied (Very & Somewhat)	2013	94%	90%	84%	81%	76%
	2014	95%	94% (▲)	90% (▲)	80%	78%
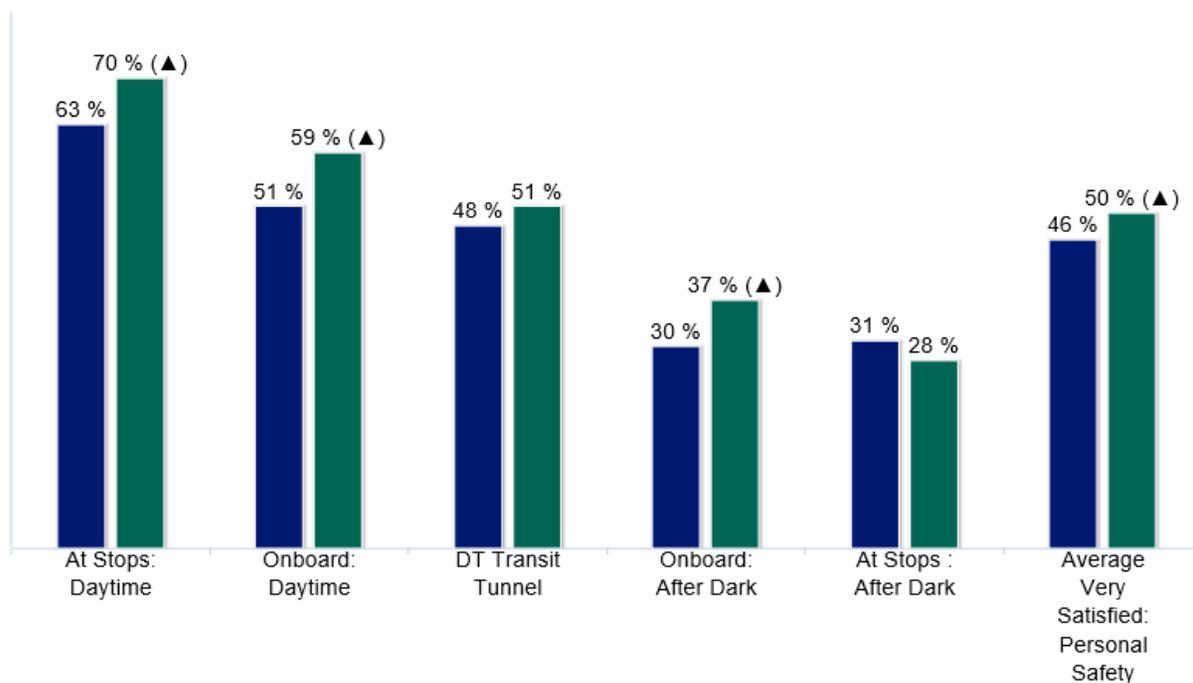
■ 2013 ■ 2014

% Very Satisfied

Base: Regular and Infrequent Riders

	2013	2014
n	1,395	1,102
n_w	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

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The percentage of Riders very satisfied with Personal Safety increased significantly for South King County Riders. Riders in South King County have been the least satisfied with Personal Safety in the past.

- The increase in satisfaction with Personal Safety is due to significant increases in satisfaction with Safety Onboard.

While there is no significant change in the percentage very satisfied with Personal Safety among Riders in Seattle / North King County, the percentage of Seattle / North King County Riders very satisfied with Safety at Stops after Dark decreased significantly.

Table 69: Personal Safety: Changes in Very Satisfied Ratings by Area of Residence

	Very Satisfied					
	Seattle / North King		South King		East King	
	2013	2014	2013	2014	2013	2014
Average: Personal Safety	47%	48%	39%	46% (▲)	54%	58%
Onboard: Daytime	50%	55%	42%	53% (▲)	68%	70%
Onboard: After Dark	29%	30%	22%	37% (▲)	47%	45%
At Stops: Daytime	65%	71%	54%	61%	73%	78%
At Stops : After Dark	32%	23% (▼)	24%	26%	36%	36%

The percentage of Riders very satisfied with Personal Safety increased significantly for both Regular and Infrequent Riders.

- Infrequent Riders' satisfaction increased significantly for Daytime Safety Onboard.
- Regular Riders' satisfaction increased significantly for Daytime Safety at Stops.

Table 70: Personal Safety: Changes in Very Satisfied Ratings by Rider Status

	Very Satisfied			
	REGULAR Riders		INFREQUENT Riders	
	2013	2014	2013	2014
Average: Personal Safety	47%	51% (▲)	44%	50% (▲)
Onboard: Daytime	53%	59%	46%	59% (▲)
Onboard: After Dark	31%	36%	28%	38%
At Stops: Daytime	64%	72% (▲)	62%	67%
At Stops : After Dark	32%	29%	27%	26%
DT Transit Tunnel	49%	54%	46%	46%

Key Drivers Analysis

Safety Onboard is more important than Safety at Stops—56% (combined Daytime and After Dark Safety Onboard) compared to 35% (combined Daytime and After Dark Safety at Stops).

- As first noted in 2013, Daytime Safety Onboard is somewhat more important than Safety Onboard after Dark. This is due to the higher correlation between ratings for daytime and nighttime safety than nighttime safety to overall satisfaction with and expectations of Metro. This indicates that if individuals do not feel safe onboard during the day, they are unlikely to feel safe at night.
- On the other hand, Safety at Stops after Dark is more than twice as important as Daytime Safety at Stops.

Safety in the Downtown Transit Tunnel is not a key driver.

While ratings for Onboard Safety after Dark increased significantly, efforts should continue in this area.

- Safety at Stops and Onboard After Dark continues to represent a major priority, notably at stops in Seattle / North King County.

Figure 79: Personal Safety: Key Drivers

Safety in Transit Tunnel, 10%
Safety at Stops: Daytime, 11%
Safety Onboard: Dark, 18%
Safety at Stops: Dark, 24%
Safety Onboard: Daytime, 38%
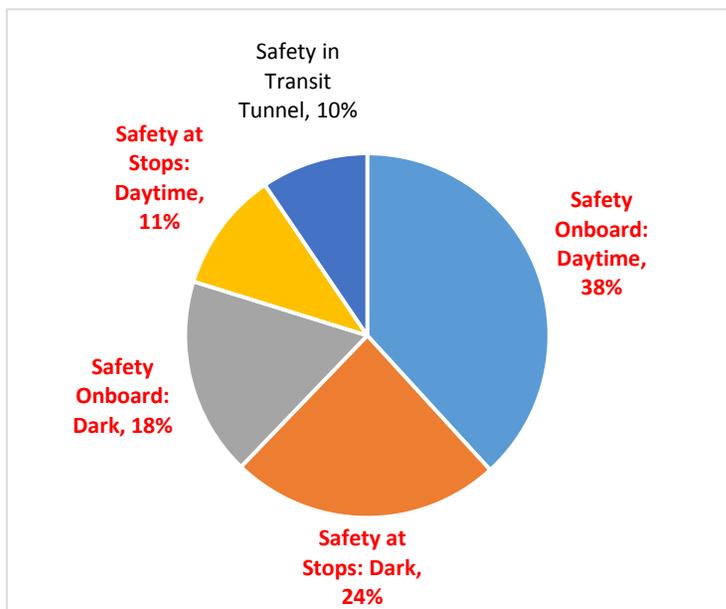
Figure 80: Personal Safety: Performance on Key Drivers

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
Safety at Stops: Daytime	70%	Safety Onboard: Dark	37%
Safety Onboard: Daytime	59%	Safety at Stops: Dark	28%
Low Importance / Above-Average Satisfaction Monitor		Low Importance / Below-Average Satisfaction Strategically Target	
	% Very Satisfied		% Very Satisfied
Safety in Transit Tunnel	51%		

Comfort and Cleanliness at Stops

Ratings 2014

Four out of five Riders are satisfied with the Comfort and Cleanliness at Stops. They are most satisfied with:

- Ease of Loading and Unloading
- Cleanliness of Shelters and Stops

They are least satisfied with:

- Availability of Seating at Shelters and Stops

Figure 81: Comfort and Cleanliness at Stops: Ratings for Quality of Service 2014

Stops Comfort / Cleanliness: Total Satisfied				
80%				
(a) Ease of Loading and Unloading	(b) Cleanliness at Stops	(c) Lighting at Stops	(d) Availability of Shelters	(e) Seating at Stops
Total Satisfied (Very & Somewhat) 86% (c▲,d▲,e▲)	85% (c▲,d▲,e▲)	78% (a▼,b▼,e▲)	77% (a▼,b▼)	72% (a▼,b▼,c▼)
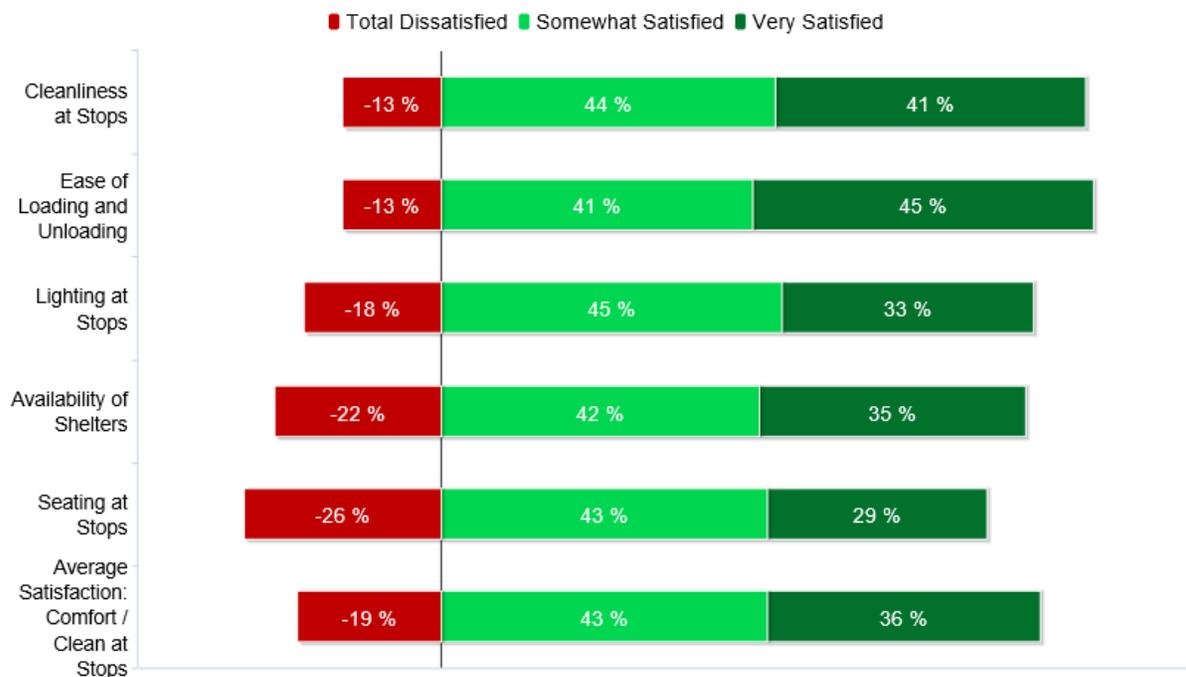
Legend: ■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

	Total Dissatisfied	Somewhat Satisfied	Very Satisfied
Cleanliness at Stops	-13 %	44 %	41 %
Ease of Loading and Unloading	-13 %	41 %	45 %
Lighting at Stops	-18 %	45 %	33 %
Availability of Shelters	-22 %	42 %	35 %
Seating at Stops	-26 %	43 %	29 %
Average Satisfaction: Comfort / Clean at Stops	-19 %	43 %	36 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Base: Regular and Infrequent Riders, asked of random subset of riders

	n	nw
2014	525	571

Changes in Ratings 2013–2014

Total satisfaction with the Comfort and Cleanliness dimension increased somewhat in 2014. This increase in total satisfaction is due to a significant increase in the percentage of riders who are satisfied with:

- Lighting at Shelters and Stops
- Availability of Shelters at Stops

It should be noted, however, that the increase in total satisfaction is due to an increase in the percentage somewhat satisfied with these elements of service.

- There was little or no increase in the percentage who are very satisfied.

While total satisfaction with the Availability of Seating at Shelters and Stops did not change, the percentage of Riders very satisfied with this element of service decreased significantly.

Figure 82: Comfort and Cleanliness at Stops: Changes in Ratings 2013–2014

	Stops Comfort / Cleanliness: Total Satisfied
2013	77%
2014	80% (▲)

Total Satisfied (Very & Somewhat)		Ease of Loading and Unloading	Cleanliness at Stops	Lighting at Stops	Availability of Shelters	Seating at Stops
	2013	89%	84%	68%	71%	71%
	2014	86%	85%	78% (▲)	77% (▲)	72%

■ 2013 ■ 2014

	Ease of Loading and Unloading	Cleanliness at Stops	Availability of Shelters	Lighting at Stops	Seating at Stops	Average Very Satisfied: Comfort/Clean at Stops
2013	49%	38%	33%	33%	35%	38%
2014	45%	41%	35%	33%	29% (▼)	36%
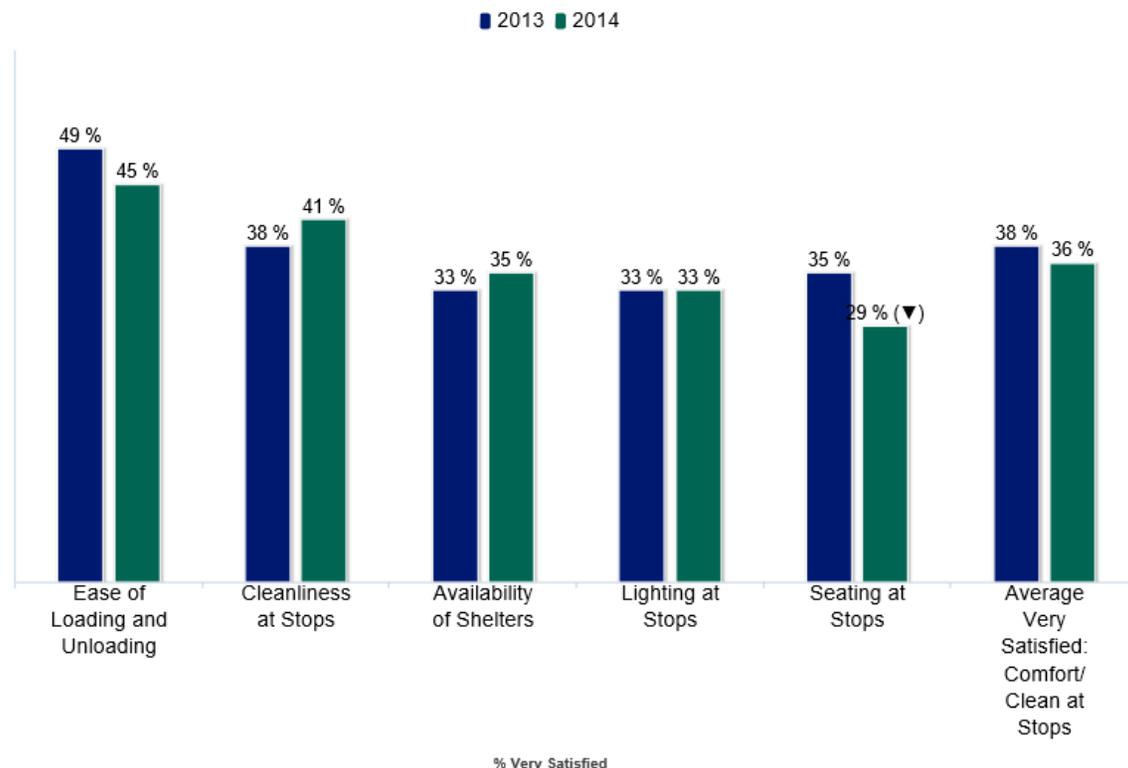
% Very Satisfied

Base: Regular and Infrequent Riders; asked of random subset of riders; ▲ / ▼ indicates a statistically change from previous year

	2013	2014
n	689	525
n_w	431	571

The percentage of Riders very satisfied with Comfort and Cleanliness at Stops decreased significantly among Seattle / North King County Riders.

- This decrease is due to a decrease in the percentage of Riders very satisfied with Seating at Stops.

The percentage of Riders very satisfied with Cleanliness of Shelters and Stops increased in South King County.

Table 71: Comfort and Cleanliness at Stops: Changes in Very Satisfied Ratings by Area of Residence

| | Very Satisfied | | | | | |
| | Seattle / North King | | South King | | East King | |
	2013	2014	2013	2014	2013	2014
Average: Comfort / Cleanliness at Stops	35%	29% (▼)	32%	37%	39%	39%
Cleanliness at Stops	37%	35%	30%	43% (▲)	52%	45%
Seating at Stops	36%	23% (▼)	36%	33%	30%	31%
Lighting at Stops	34%	29%	29%	33%	39%	38%
Availability of Shelters	33%	27%	31%	36%	33%	43%

In 2014, Regular Riders are less likely than Infrequent Riders to be very satisfied with Comfort and Cleanliness at Stops. Moreover, Regular Riders' satisfaction with Comfort and Cleanliness at Stops decreased due to a significant decrease in the percentage of Regular Riders very satisfied with

- Availability of Seating at Stops

While the average percentage of Very Satisfied Infrequent Riders did not change, Infrequent Riders are increasingly likely to be very satisfied with:

- Cleanliness of Shelters and Stops
- Availability of Shelters at Stops

Table 72: Comfort and Cleanliness at Stops: Changes in Very Satisfied Ratings by Rider Status

| | Very Satisfied | | | |
| | REGULAR Riders | | INFREQUENT Riders | |
	2013	2014	2013	2014
Average: Comfort / Cleanliness at Stops	38%	32% (▼)	38%	42%
Cleanliness at Stops	39%	36%	36%	47% (▲)
Seating at Stops	38%	25% (▼)	29%	33%
Lighting at Stops	31%	32%	37%	34%
Availability of Shelters	33%	29%	32%	43% (▲)
Ease of Loading and Unloading	46%	40%	55%	52%

Key Drivers Analysis

All five elements of service related to the Comfort and Cleanliness at Stops service dimension are significant contributors to Riders' overall satisfaction with and expectations of Metro.

- Ease of Loading and Unloading due to crowding is by far the most important.

The other four are nearly equal in importance.

Less than half of all riders say they are very satisfied with any single aspect of Comfort and Cleanliness at Stops, making every element of service within this overall service dimension a priority.

- The highest priority should be Ease of Loading and Unloading due to crowding, notably for routes originating in Seattle / North King County.
- The second set of priorities should be the lowest rated elements of service: Seating at Shelters and Stops, Lighting, and Availability of Shelters.

Figure 83: Comfort and Cleanliness at Stops: Key Drivers

Availability of Seating, 16%
Ease of Loading / Unloading Due to Crowding, 32%
Cleanliness of Shelters / Stops, 17%
Lighting, 17%
Availability of Shelters, 18%
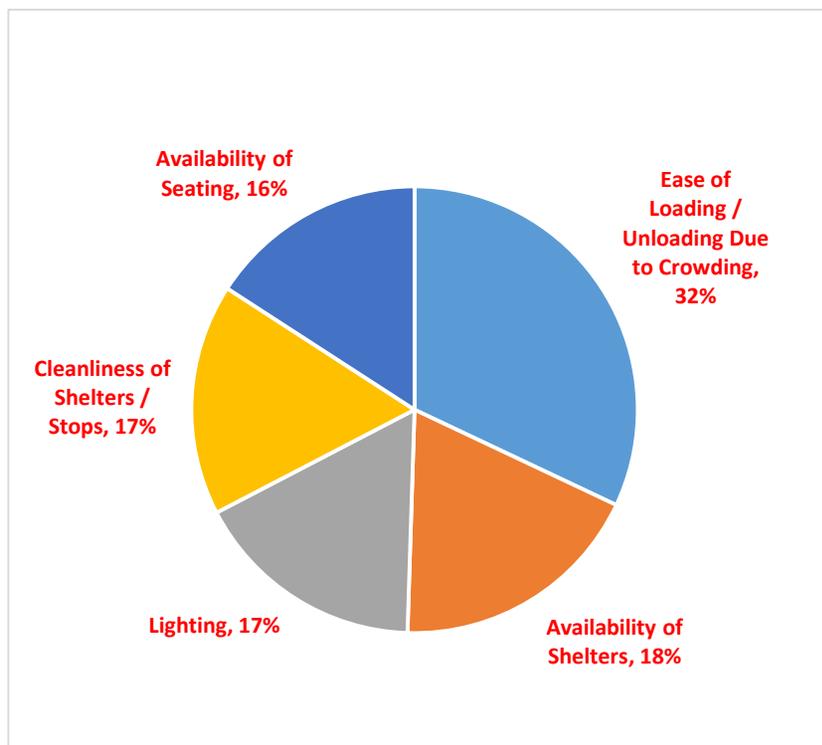
Figure 84: Comfort and Cleanliness at Stops: Performance on Key Drivers

High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied
Ease of Loading / Unloading Due to Crowding	45%
Cleanliness of Stops / Shelters	41%
Availability of Shelters	35%
Amount of Lighting	33%
Seating at Stops / Shelters	29%

Comfort and Cleanliness Onboard

Ratings 2014

Three out of four Riders are satisfied with the Comfort and Cleanliness Onboard dimension.

They are most satisfied with:

- Inside Cleanliness of the Vehicles

They are significantly less satisfied with:

- Ease of Loading and Unloading due to crowding on the vehicles
- Availability of Seating

Riders are least satisfied with:

- Overcrowding

Overcrowding continues to be a greater issue than Availability of Seating.

Figure 85: Comfort and Cleanliness Onboard: Ratings for Quality of Service 2014

	Onboard Comfort / Cleanliness: Total Satisfied			
	76%			
	(a) Inside Cleanliness	**(b) Ease of Loading and Unloading**	**(c) Availability of Seating**	**(d) Overcrowding**
Total Satisfied (Very & Somewhat)	90% (b▲,c▲,d▲)	77% (a▼,d▲)	77% (a▼,d▲)	58% (a▼,b▼,c▼)
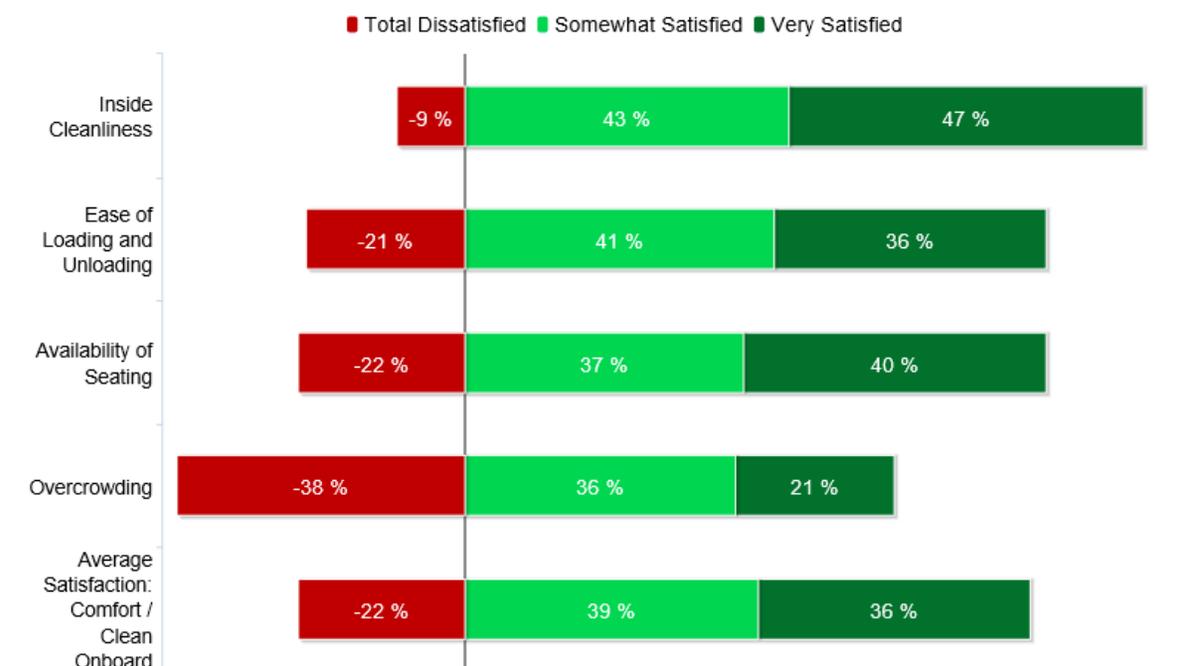
Legend: ■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

	Total Dissatisfied	Somewhat Satisfied	Very Satisfied
Inside Cleanliness	-9 %	43 %	47 %
Ease of Loading and Unloading	-21 %	41 %	36 %
Availability of Seating	-22 %	37 %	40 %
Overcrowding	-38 %	36 %	21 %
Average Satisfaction: Comfort / Clean Onboard	-22 %	39 %	36 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
             The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Base: Regular and Infrequent Riders, asked of a random selection of riders

	n	n_w
2014	518	563

Changes in Ratings 2013–2014

With the exception of Inside Cleanliness, Riders' total satisfaction with all elements of service within the Comfort and Cleanliness Onboard service dimension has decreased.

The decrease in total satisfaction and percentage very satisfied is greatest for the two elements of service related to crowding:

- Overcrowding
- Ease of Loading and Unloading due to crowding

Figure 86: Comfort and Cleanliness Onboard: Changes in Ratings 2013–2014

Onboard Comfort/Cleanliness: Total Satisfied	
2013	83%
2014	76% (▼)

	Inside Cleanliness	Ease of Loading and Unloading	Availability of Seating	Overcrowding
Total Satisfied (Very & Somewhat) 2013	90%	87%	84%	69%
Total Satisfied (Very & Somewhat) 2014	90%	77% (▼)	77% (▼)	58% (▼)

Inside Cleanliness: 2013 46%, 2014 47%
Availability of Seating: 2013 47%, 2014 40% (▼)
Ease of Loading and Unloading: 2013 48%, 2014 36% (▼)
Overcrowding: 2013 29%, 2014 21% (▼)
Average: Comfort/Clean Onboard: 2013 43%, 2014 36% (▼)
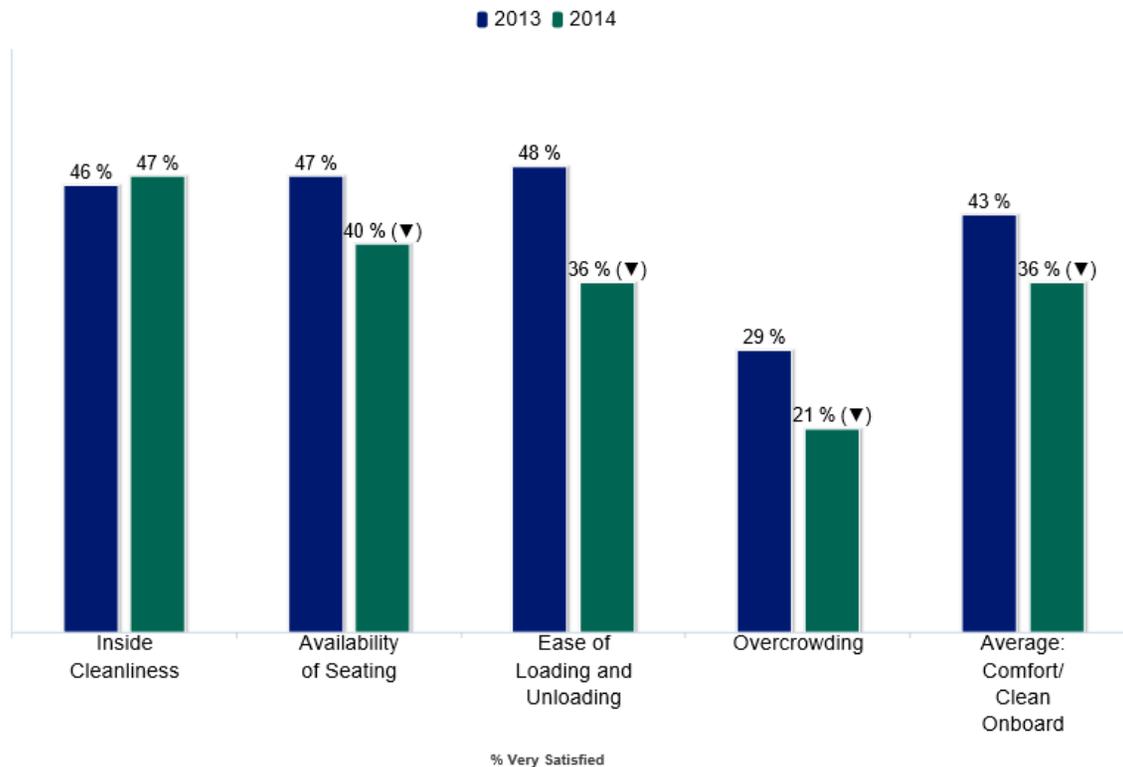
% Very Satisfied

Base: Regular and Infrequent Riders; asked of a random selection of riders

	2013	2014
n	683	518
n_w	428	563

▲ / ▼ indicates a statistically significant change from previous year

The percentage of Riders very satisfied with the Comfort and Cleanliness Onboard service dimension decreased significantly in Seattle / North King County. Satisfaction decreased for all elements of service, due to significant decreases for:

- Availability of Seating
- Overcrowding
- Ease of Loading and Unloading due to crowding

The percentage of Riders very satisfied with the Comfort and Cleanliness Onboard service dimension also decreased in East King County, due to a decrease in satisfaction with:

- Ease of Loading and Unloading due to crowding

Table 73: Comfort and Cleanliness Onboard: Changes in Very Satisfied Ratings by Area of Residence

| | Very Satisfied | | | | | |
| | Seattle / North King | | South King | | East King | |
	2013	2014	2013	2014	2013	2014
Average: Comfort / Cleanliness Onboard	41%	28% (▼)	39%	39%	53%	45% (▼)
Inside Cleanliness	48%	41%	35%	46%	61%	58%
Availability of Seating	45%	31% (▼)	49%	44%	53%	47%
Overcrowding	27%	12% (▼)	28%	26%	36%	27%
Ease of Loading and Unloading	44%	28% (▼)	45%	38%	64%	45% (▼)

Very satisfied ratings with Comfort and Cleanliness Onboard decreased for both Regular and Infrequent Riders.

Both Regular and Infrequent Riders are less satisfied with:

- Overcrowding
- Ease of Loading and Unloading due to crowding

Perhaps due to being older, Infrequent Riders are also less satisfied with the Availability of Seating.

Table 74: Comfort and Cleanliness Onboard: Changes in Very Satisfied Ratings by Rider Status

| | Very Satisfied | | | |
| | REGULAR Riders | | INFREQUENT Riders | |
	2013	2014	2013	2014
Average: Comfort / Cleanliness Onboard	38%	32% (▼)	50%	42% (▼)
Inside Cleanliness	44%	43%	50%	53%
Availability of Seating	40%	35%	59%	47% (▼)
Overcrowding	25%	18% (▼)	35%	26% (▼)
Ease of Loading and Unloading	42%	32% (▼)	57%	43% (▼)

Key Drivers Analysis

Three of the four individual elements of service contained within the Comfort and Cleanliness Onboard service dimension are key drivers of Riders' satisfaction with and expectations of Metro.

- Overcrowding on the bus and Inside Cleanliness are the most important drivers and are nearly equal in importance.
- While a key driver, Ease of Loading and Unloading due to crowding is somewhat less important, due in part to its high correlation with general overcrowding.

Availability of Seating on the bus is not a significant driver, due to its high correlation with overcrowding.

Overcrowding is the most significant issue, notably on routes serving riders living in Seattle / North King County.

Ease of Loading and Unloading due to crowding is also a significant issue.

Figure 87: Comfort and Cleanliness Onboard: Key Drivers
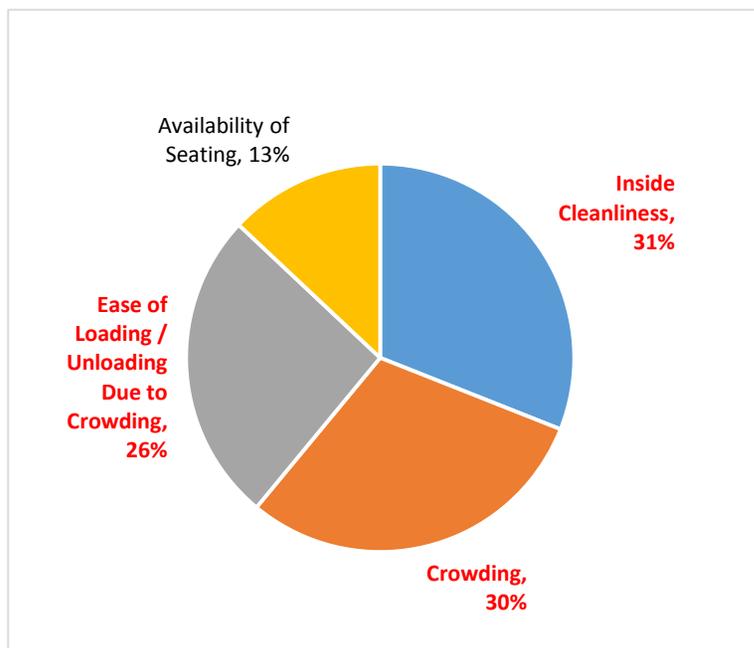
Figure 88: Comfort and Cleanliness Onboard: Performance on Key Drivers

High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied
Inside Cleanliness	47%
Ease of Loading & Unloading	36%
Overcrowding	21%
Low Importance / Below-Average Satisfaction Strategically Target	
	% Very Satisfied
Availability of Seating	40%

Information Sources

Ratings 2014

Riders are highly satisfied with their ability to get information about Metro—online and overall.

- While still highly satisfied, they are least satisfied with the Information Available at Stops (including stops, Transit Centers, and park-and-ride lots). This is a new question, added in 2014.

Figure 89: Information Sources: Ratings for Quality of Service 2014
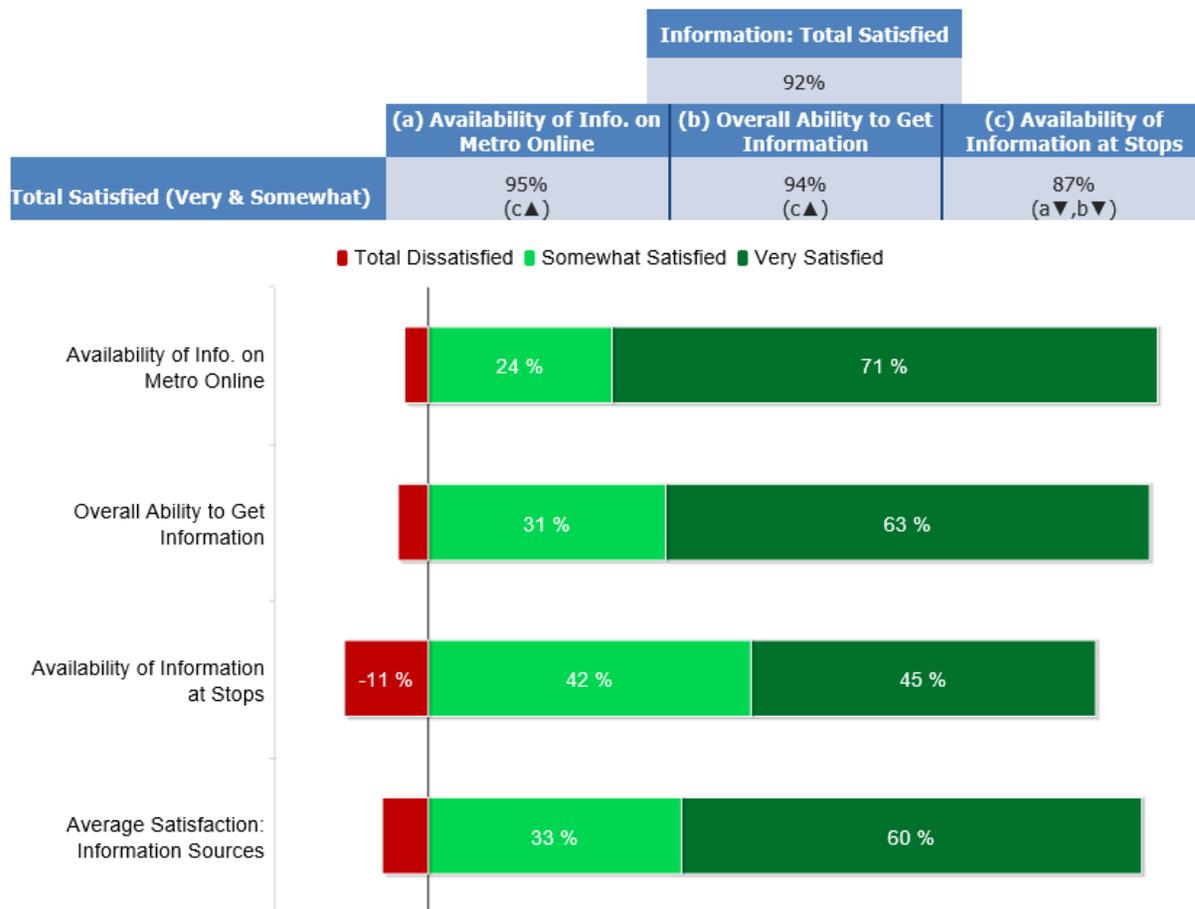
	Information: Total Satisfied		
	92%		
	(a) Availability of Info. on Metro Online	**(b) Overall Ability to Get Information**	**(c) Availability of Information at Stops**
Total Satisfied (Very & Somewhat)	95% (c▲)	94% (c▲)	87% (a▼,b▼)

■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

Availability of Info. on Metro Online — 24 % / 71 %

Overall Ability to Get Information — 31 % / 63 %

Availability of Information at Stops — -11 % / 42 % / 45 %

Average Satisfaction: Information Sources — 33 % / 60 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Small percentages (<10%) do not show on graph
Base: Regular and Infrequent Riders; asked of random selection of riders; base varies based on use of information sources

	n	n_w
2014	*569*	*579*

Changes in Ratings 2013–2014

The percentage of Riders' who are very satisfied with Sources of Information about Metro increased significantly in 2014. (Note that the total satisfied and total very satisfied in this figure is different from the previous figure as information at stops is not included as it was not asked in 2013.)

- This increase is due to a significant increase in the percentage of Riders who are very satisfied with the Availability of Information on Metro Online.

Figure 90: Information Sources: Changes in Ratings 2013–2014

	Information: Total Satisfied
2013	95%
2014	95%

		Availability of Info. on Metro Online	Overall Ability to Get Information
Total Satisfied (Very & Somewhat)	2013	95%	94%
	2014	95%	94%
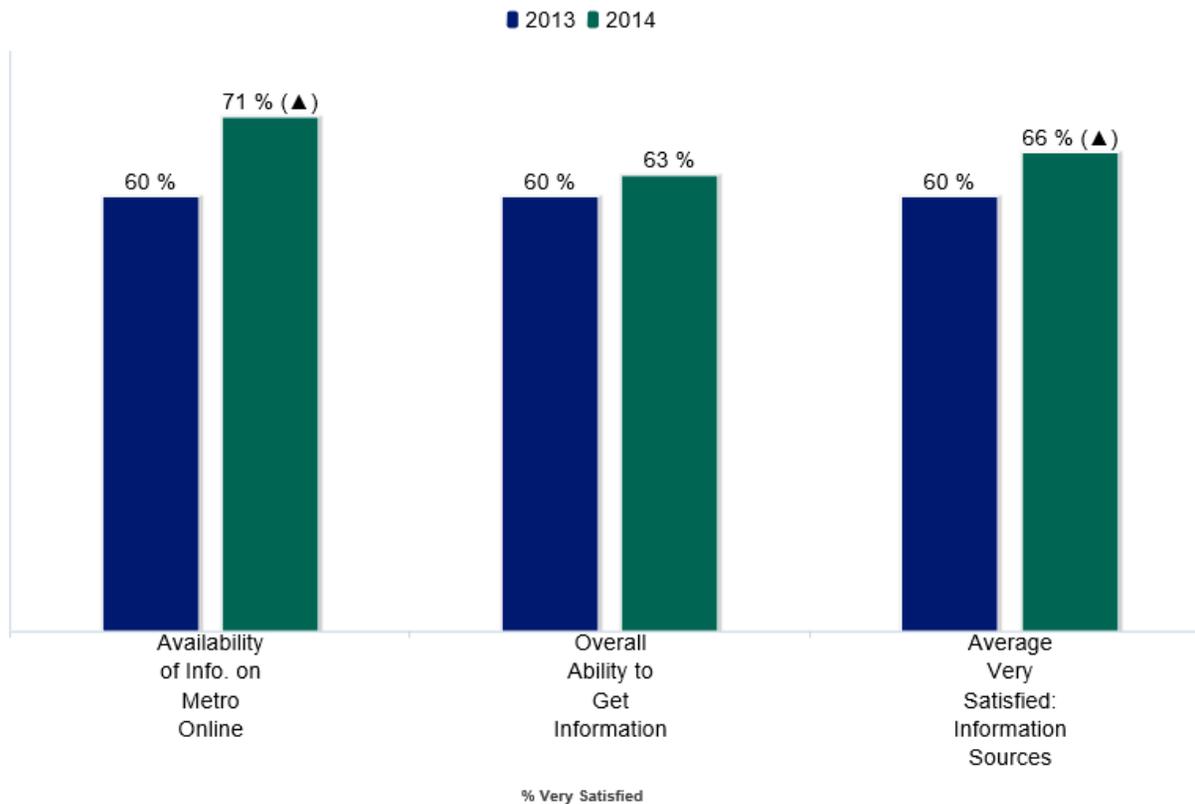
■ 2013 ■ 2014

71 % (▲)
60 %
60 %
63 %
60 %
66 % (▲)

Availability of Info. on Metro Online
Overall Ability to Get Information
Average Very Satisfied: Information Sources

% Very Satisfied

Base: Regular and Infrequent Riders; asked of random selection of riders; base varies based on use of information sources

	2013	2014
n	1,386	569
nw	884	579

▲ / ▼ indicates a statistically significant change from previous year

The percentage of Riders very satisfied with Information Sources increased significantly among Seattle / North and South King County Riders.

- Riders in both areas are increasingly satisfied with the Availability of Information at Metro Online. The increase in satisfaction is greatest for Riders in South King County.
- Riders in South King County are also increasingly satisfied with their overall ability to get information.

The percentage of Very Satisfied Riders decreased among East King County Riders.

- Significantly fewer East King County Riders are very satisfied with their Overall Ability to Get Information.

Table 75: Information Sources: Changes in Very Satisfied Rating by Area of Residence

	Very Satisfied					
	Seattle / North King		South King		East King	
	2013	2014	2013	2014	2013	2014
Average: Information	61%	70% (▲)	53%	71% (▲)	68%	56% (▼)
Overall Ability to Get Information	60%	67%	53%	68% (▲)	68%	55% (▼)
Availability of Info. on Metro Online	61%	75% (▲)	53%	79% (▲)	67%	59%

Regular Riders are somewhat more likely than Infrequent Riders to be very satisfied with the Information Sources dimension.

- Moreover, the percentage of Very Satisfied Regular Riders increased significantly in 2014.

Infrequent Riders' satisfaction with the Availability of Information on Metro Online increased significantly in 2014.

Table 76: Information Sources: Changes in Very Satisfied Ratings by Rider Status

	Very Satisfied			
	REGULAR Riders		INFREQUENT Riders	
	2013	2014	2013	2014
Average: Information	59%	67% (▲)	61%	64%
Overall Ability to Get Information	59%	66% (▲)	60%	59%
Availability of Info. on Metro Online	59%	69% (▲)	61%	75% (▲)

Key Drivers Analysis

All three elements of service within the Information Sources Dimension are important. • The Overall Ability to Get Information is most important. The two specific sources of information—Online and at Stops—are equally important.	In general, the Ability to Get Information, notably online, is a strength. Riders are less satisfied with the Availability of Information at Stops. This element of service may become increasingly important if Metro eliminates printed timetables.
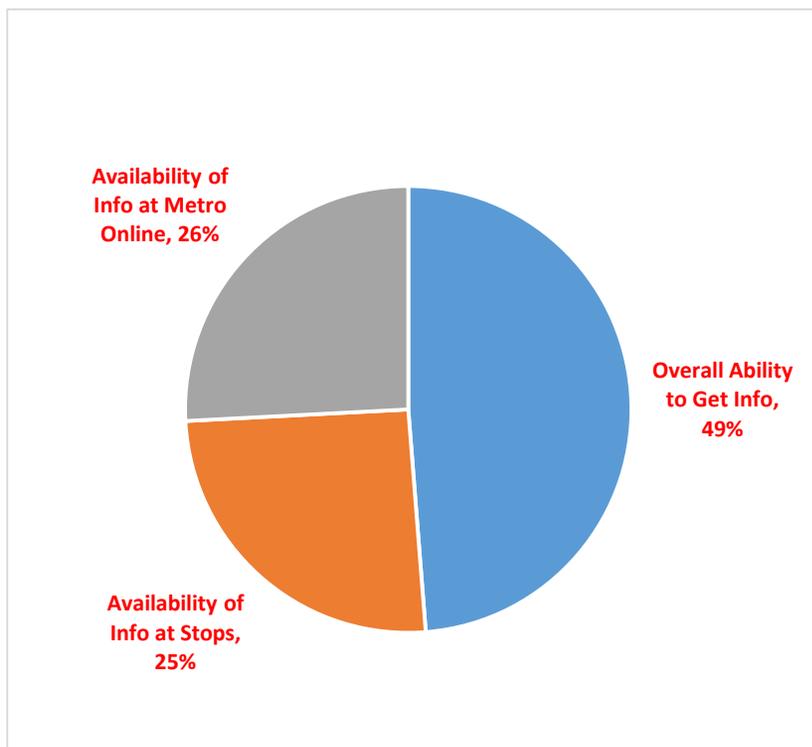
Figure 91: Information Sources: Key Drivers	*Figure 92: Information Sources: Performance on Key Drivers*

Figure 91: Information Sources: Key Drivers

- Overall Ability to Get Info, 49%
- Availability of Info at Metro Online, 26%
- Availability of Info at Stops, 25%

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
Availability of Information Online	71%	Availability of Information at Stops	45%
Overall Ability to Get Information	63%		

Metro Drivers

Ratings 2014

Drivers are a major strength for Metro.

- More than nine out of ten Riders are satisfied with Metro Drivers. Nearly two out of three are very satisfied.
- While still highly satisfied, Drivers Effectively Handle Problems on the Vehicles receives the lowest rating.

Figure 93: Metro Drivers: Ratings for Quality of Service 2014
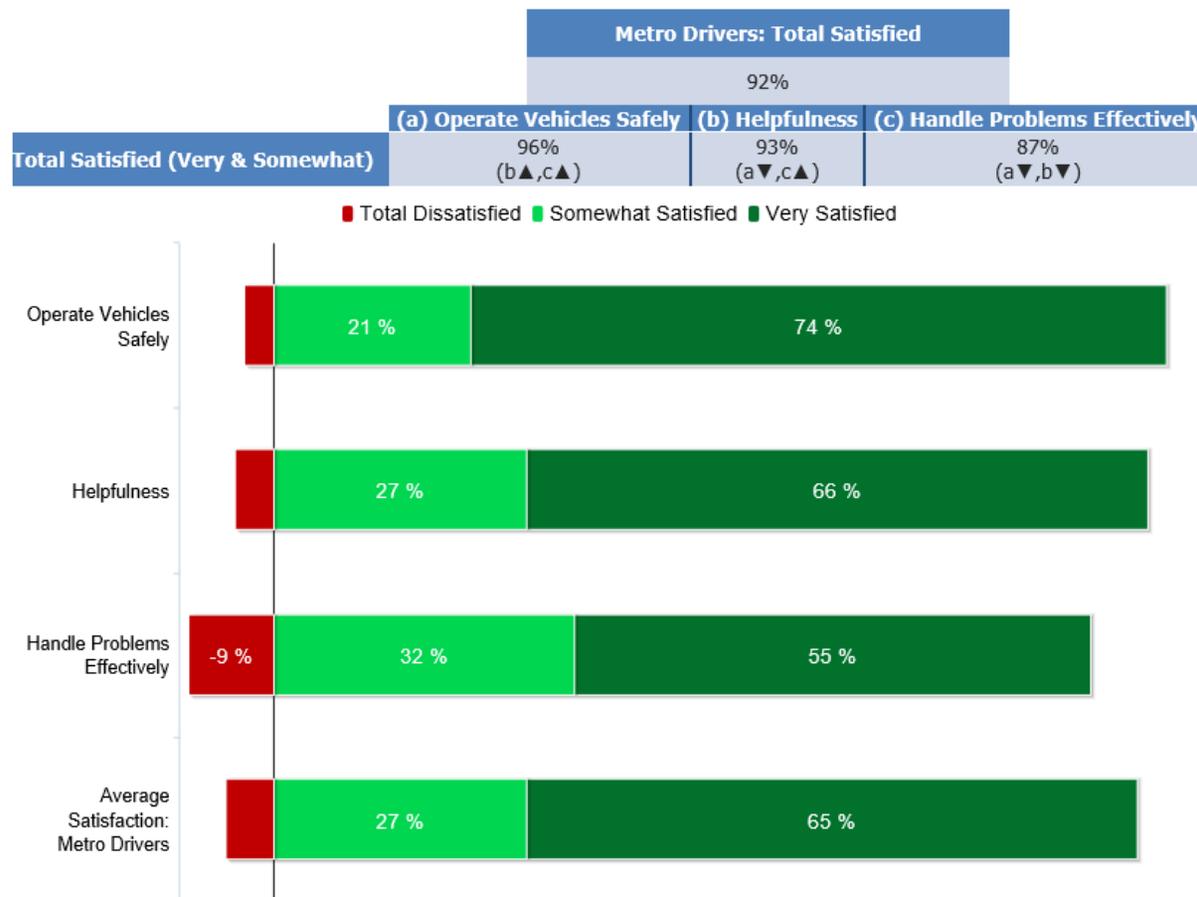
Metro Drivers: Total Satisfied		
92%		
(a) Operate Vehicles Safely	**(b) Helpfulness**	**(c) Handle Problems Effectively**
96% (b▲,c▲)	93% (a▼,c▲)	87% (a▼,b▼)

Legend: ■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

Total Satisfied (Very & Somewhat)

- Operate Vehicles Safely: 21 % / 74 %
- Helpfulness: 27 % / 66 %
- Handle Problems Effectively: -9 % / 32 % / 55 %
- Average Satisfaction: Metro Drivers: 27 % / 65 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Small percentages (<10%) do not show on graph
Base: Regular and Infrequent Riders, asked of random selection of riders

	n	nw
2014	577	587

Changes in Ratings 2013—2014

While total satisfaction with Metro Drivers did not change in 2014, the percentage of Riders who are very satisfied with Metro Drivers decreased somewhat.

- This decrease is due to a significant decrease in the percentage of Riders very satisfied with Drivers Effectively Handle Problems on the Vehicles.

Figure 94: Metro Drivers: Changes in Ratings 2013–2014

	Metro Drivers: Total Satisfied
2013	91%
2014	92%

Total Satisfied (Very & Somewhat)		Operate Vehicles Safely	Helpfulness	Handle Problems Effectively
	2013	95%	91%	87%
	2014	96%	93%	87%

■ 2013 ■ 2014

% Very Satisfied
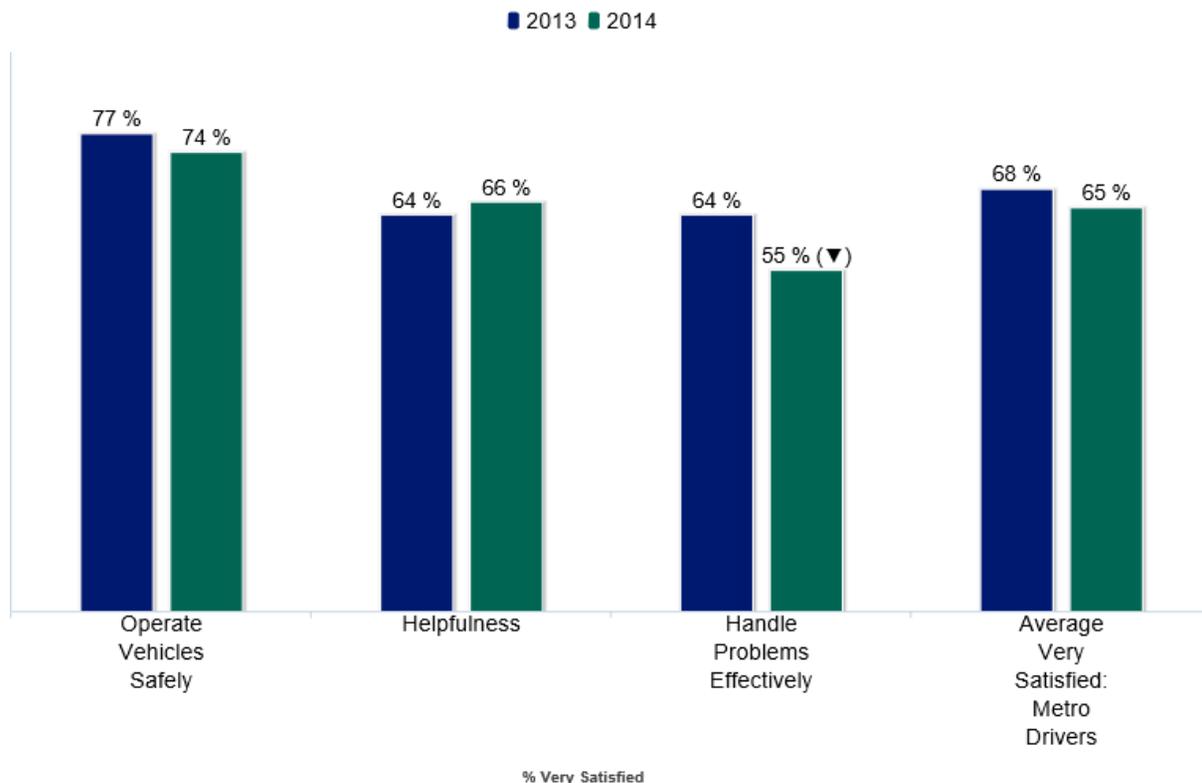
Base: Regular and Infrequent Riders, asked of random selection of riders; ▲ / ▼ indicates a statistically significant change from previous year

	2013	2014
n	703	577
nw	459	587

Riders' satisfaction with how Drivers Effectively Handle Problems on the Vehicles decreased significantly among:

- Riders living in Seattle / North King County
- Regular Riders

Table 77: Metro Drivers: Changes in Very Satisfied Ratings by Area of Residence

| | Very Satisfied | | | | | |
| | Seattle / North King | | South King | | East King | |
	2013	2014	2013	2014	2013	2014
Average: Drivers	68%	63%	66%	62%	75%	71%
Helpfulness	63%	65%	63%	61%	69%	72%
Operate Vehicles Safely	77%	73%	76%	75%	81%	75%
Handle Problems Effectively	63%	52% (▼)	59%	49%	74%	64%

Table 78: Metro Drivers: Changes in Very Satisfied Ratings by Rider Status

| | Very Satisfied | | | |
| | REGULAR Riders | | INFREQUENT Riders | |
	2013	2014	2013	2014
Average: Drivers	68%	64%	70%	68%
Helpfulness	64%	64%	63%	70%
Operate Vehicles Safely	74%	73%	83%	76%
Handle Problems Effectively	65%	53% (▼)	63%	58%

Key Drivers Analysis

All three elements of service related to Metro Drivers are important. • Drivers Effectively Handle Problems on the Vehicles is most important.	All three elements of service receive high satisfaction ratings. Drivers Effectively Handle Problems when they occur receives the lowest rating, and, as noted, ratings for this element of service have declined. Attention should be focused on this aspect of service.

Figure 95: Metro Drivers: Key Drivers

Pie chart:
- Effectively Handle Problems on Vehicles, 46%
- Helpfulness with Info, 34%
- Safe Vehicle Operation, 21%
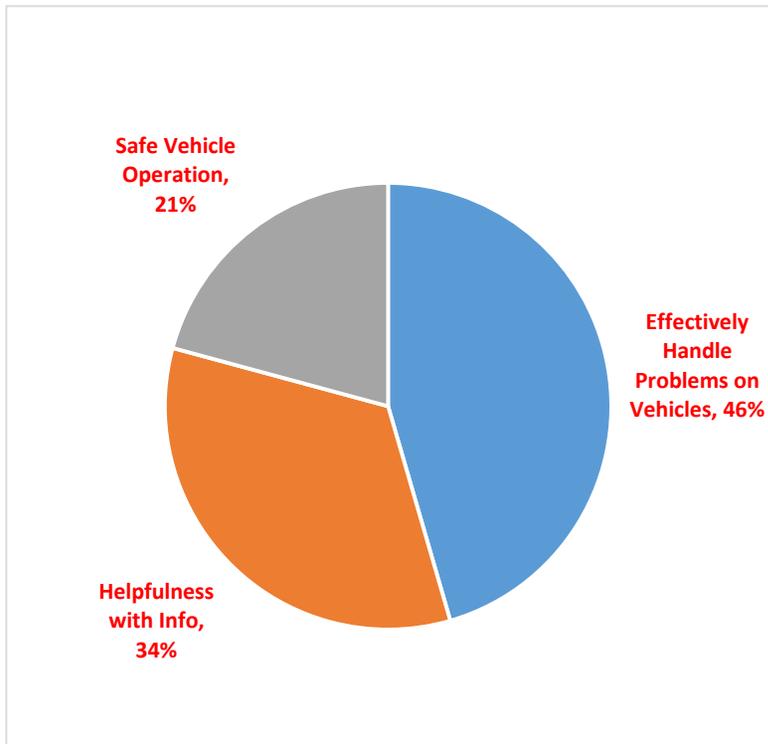
Figure 96: Metro Drivers: Performance on Key Drivers

High Importance / Above-Average Satisfaction Maintain	
	% Very Satisfied
Safe Vehicle Operation	74%
Helpfulness	66%
Effectively Handle Problems	55%

Park-and-Ride Lots

Ratings 2014

Overall, more than four out of five park-and-ride lot users are satisfied with the elements of service within the Park-and-Ride Lot dimension.

- However, less than half are very satisfied with any of the individual service elements.
- Availability of Parking has the lowest satisfaction ratings.

Figure 97: Park-and-Ride Lots: Ratings for Quality of Service 2014

Park-and-Ride Lots: Total Satisfied			
83%			
(a) Personal Safety	(b) Lighting	(c) Vehicle Security	(d) Parking Availability

	(a) Personal Safety	(b) Lighting	(c) Vehicle Security	(d) Parking Availability
Total Satisfied (Very & Somewhat)	92% (b▲,c▲,d▲)	87% (a▼,d▲)	85% (a▼,d▲)	67% (a▼,b▼,c▼)

Legend: ■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

Category	Total Dissatisfied	Somewhat Satisfied	Very Satisfied
Personal Safety		45 %	46 %
Vehicle Security	-11 %	45 %	40 %
Lighting	-12 %	39 %	48 %
Parking Availability	-31 %	34 %	34 %
Average Satisfaction: Park-and-Ride Lots	-15 %	41 %	42 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Small percentages (<10%) do not show on graph
Base: Regular and Infrequent Riders who used park-and-ride lot in last year

	n	nw
2014	472	543

Changes in Ratings 2013–2014

The percentage of Very Satisfied park-and-ride lot users decreased significantly due to a decrease in the percentage very satisfied with the availability of parking.

- The percentage very satisfied decreased for the other elements of service as well but the decrease is less and significant only at the 90% confidence level.

Figure 98: Park-and-Ride Lots: Changes in Ratings 2013–2014

		Park-and-Ride Lots: Total Satisfied		
2013		85%		
2014		83%		
		Personal Safety	Lighting	Vehicle Security	Parking Availability
Total Satisfied (Very & Somewhat)	2013	91%	86%	88%	76%
	2014	92%	87%	85%	67% (▼)

■ 2013 ■ 2014

- Lighting: 54 % / 48 %
- Personal Safety: 52 % / 46 %
- Vehicle Security: 44 % / 40 %
- Parking Availability: 46 % / 34 % (▼)
- Average Very Satisfied: Park-and-Ride Lots: 48 % / 42 % (▼)
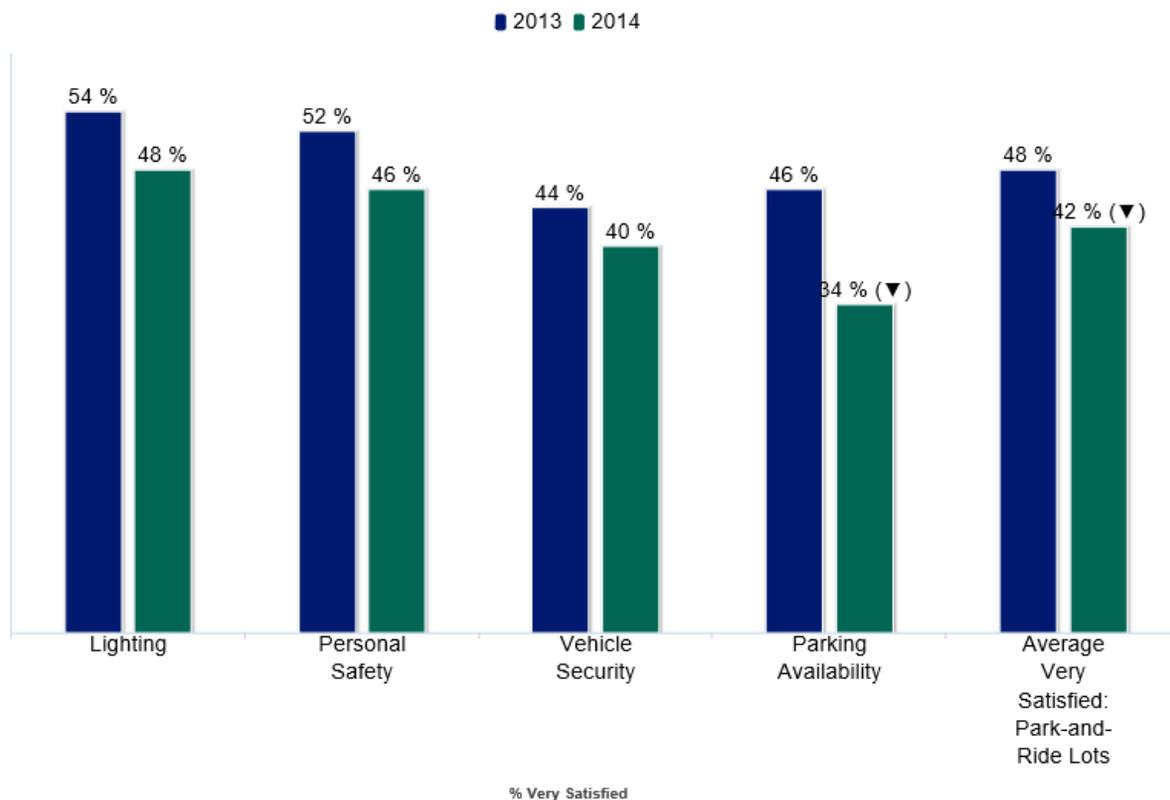
% Very Satisfied

Base: Regular and Infrequent Riders

	2013	2014
n	891	472
nw	768	543

▲ / ▼ *indicates a statistically significant change from previous year*

The percentage of very satisfied ratings decreased among users in Seattle / North King and East King County.

- The decrease is greatest in Seattle / North King County due to a decrease in the percentage very satisfied for all elements except for Vehicle Security.

Satisfaction with Availability of Parking decreased among Seattle / North and East King County park-and-ride lot users.

- The decrease is greatest among those living in Seattle / North King County.

Table 79: Park-and-Ride Lots: Changes in Very Satisfied Ratings by Area of Residence

| | Very Satisfied | | | | | |
| | Seattle / North King | | South King | | East King | |
	2013	2014	2013	2014	2013	2014
Average: Park-and-Ride Lots	51%	36% (▼)	42%	40%	52%	46% (▼)
Parking Availability	48%	25% (▼)	43%	41%	47%	31% (▼)
Personal Safety	57%	38% (▼)	41%	40%	58%	55%
Vehicle Security	42%	34%	37%	35%	51%	46%
Lighting	62%	43% (▼)	53%	44%	52%	53%

Key Drivers Analysis

While the overall Park-and-Ride Lot service dimension is not a key driver (even among users), two out of four elements of service within this dimension are important to users.

- Parking Availability is the most important element of service within this dimension.
- Vehicle Security is also an important element of service.

Lighting and Personal Safety at Park-and-Ride Lots are relatively unimportant.

Availability of Parking is the most important element of service and receives the lowest satisfaction rating of all the park-and-ride lot elements of service.

- Availability of Parking is rated lowest in Seattle / North and East King County.

Vehicle Security is also a priority area.

- Vehicle Security is a greater concern to Riders in Seattle / North and South King County.

Figure 99: Park-and-Ride Lots: Key Drivers

Personal Safety, 16%
Lighting, 20%
Parking Availability, 38%
Vehicle Security, 26%
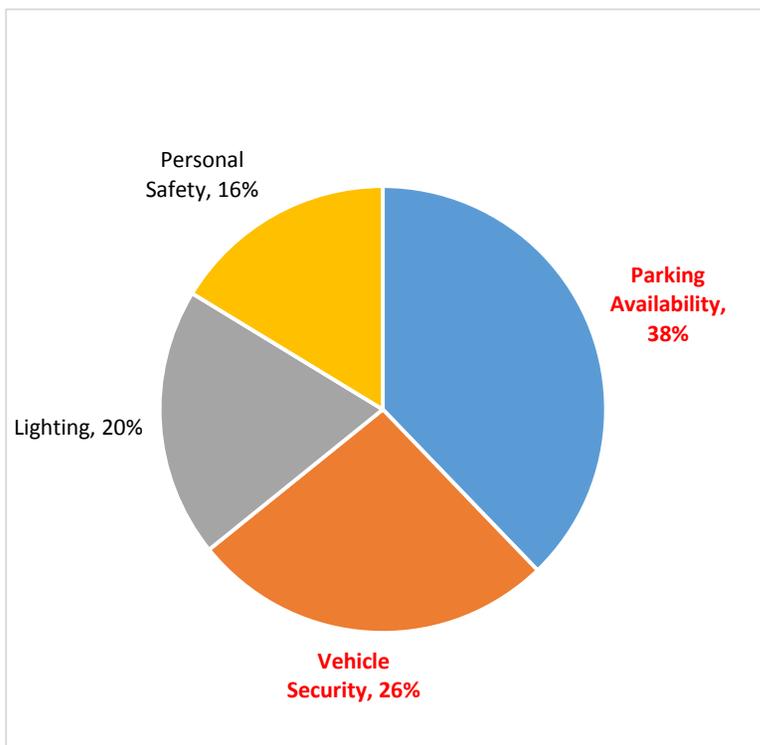
Figure 100: Park-and-Ride Lots: Performance on Key Drivers

High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied
Vehicle Security	40%
Availability of Parking	34%
Low Importance / Below-Average Satisfaction Strategically Target	
	% Very Satisfied
Lighting	48%
Personal Safety	46%

Fare Payment

Ratings 2014

Riders are highly satisfied with all elements of service within the Fare Payment dimension.

- While still satisfied, ORCA Card users indicate the highest levels of dissatisfaction with the Availability of Locations to Purchase a Pass or Add Value to an E-Purse.
- Riders are more likely to say they are very satisfied with the Ease of Loading a Pass on an ORCA Card than the Ease of Adding Value to an E-Purse.

Figure 101: Fare Payment: Ratings for Quality of Service 2014

	Fare Payment: Total Satisfied				
	94%				
	(a) ORCA Card	(b) Ease of Paying when Boarding	(c) Ease Adding Value E-Purse	(d) Ease of Loading a Pass	(e) Availability of Locations to Buy Pass / Add Value to E-Purse
Total Satisfied (Very & Somewhat)	99% (c▲,d▲,e▲)	98% (c▲,d▲,e▲)	92% (a▼,b▼,e▲)	89% (a▼,b▼,e▲)	81% (a▼,b▼,c▼,d▼)
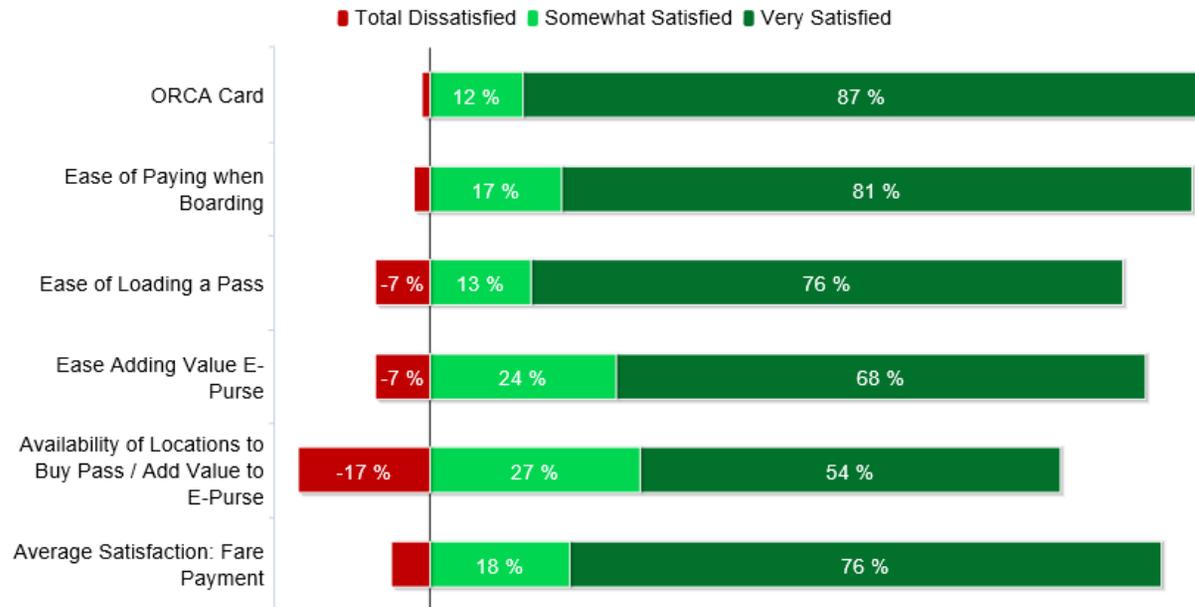
Legend: ■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

	Total Dissatisfied	Somewhat Satisfied	Very Satisfied
ORCA Card		12 %	87 %
Ease of Paying when Boarding		17 %	81 %
Ease of Loading a Pass	-7 %	13 %	76 %
Ease Adding Value E-Purse	-7 %	24 %	68 %
Availability of Locations to Buy Pass / Add Value to E-Purse	-17 %	27 %	54 %
Average Satisfaction: Fare Payment		18 %	76 %

Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
The sum of very and somewhat satisfied may not be the same as total (very and somewhat) satisfied due to rounding
Small percentages (<10%) do not show on graph
Base: Regular and Infrequent Riders; Base varies based on ORCA Card, Pass and E-Purse use
▲ / ▼ indicates a statistically significant difference in ratings between individual service elements

	n	n_w
2014	1,102	1,161

Changes in Ratings 2013–2014

Riders remain highly satisfied with all elements of service within the Fare Payment dimension.

The percentage of Very Satisfied Riders increased significantly for:

- Ease of Paying Fares when Boarding

The percentage of Very Satisfied Riders decreased significantly for:

- Availability of Locations to Purchase Passes or Add Value to an E-Purse

Figure 102: Fare Payment: Changes in Ratings 2013–2014

	Fare Payment: Total Satisfied				
2013	94%				
2014	94%				

	ORCA Card	Ease of Paying when Boarding	Ease Adding Value E-Purse	Ease of Loading a Pass	Availability of Locations to Buy Pass / Add Value to E-Purse
Total Satisfied (Very & Somewhat) 2013	97%	96%	94%	90%	85%
Total Satisfied (Very & Somewhat) 2014	99% (▲)	98% (▲)	92%	89%	81%

■ 2013 ■ 2014

% Very Satisfied
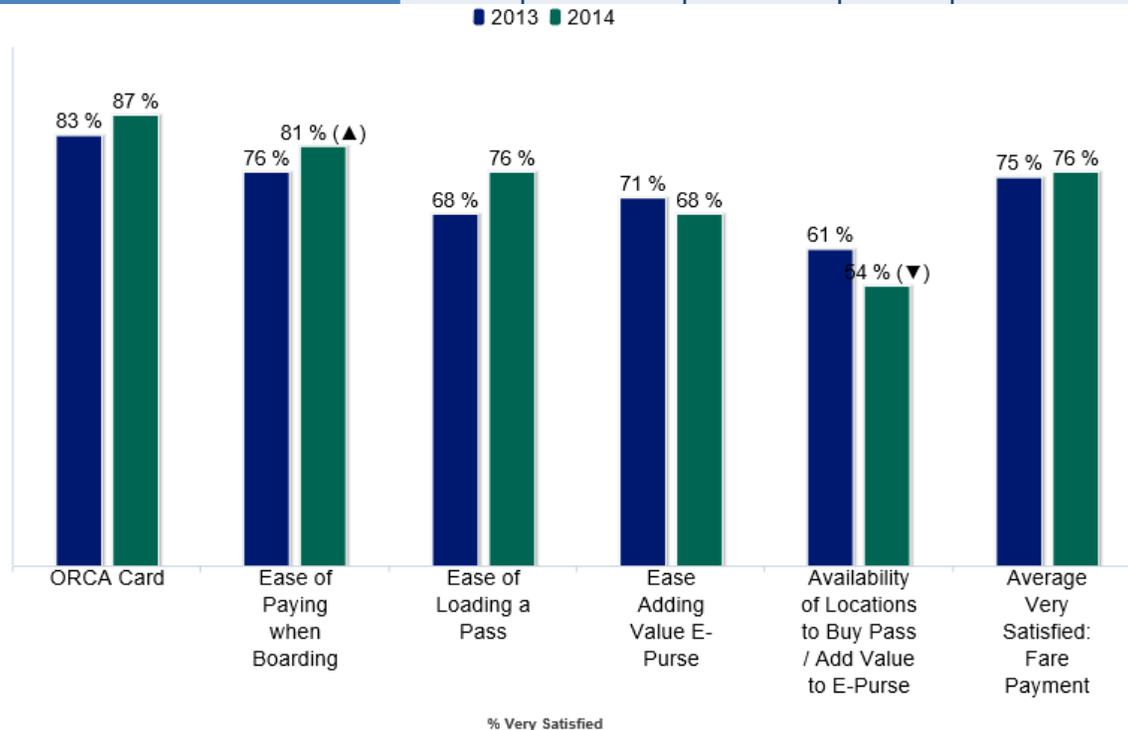
Base: Regular and Infrequent Riders; base varies based on ORCA Card, pass, and E-Purse use

	2013	2014
n	1,395	1,102
n_w	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

Overall satisfaction with Fare Payment stayed high for all Riders.

Overall satisfaction with Fare Payment stayed high for all Riders.

- The percentage of Riders very satisfied with Ease of Paying Fares when Boarding increased significantly among South King County Riders.

Table 80: Fare Payment: Changes in Very Satisfied Ratings by Area of Residence

	Very Satisfied					
	Seattle / North King		South King		East King	
	2013 **	2014	2013 **	2014 **	2013 **	2014 **
Average: Fare Payment	77%	76%	70%	73%	81%	79%
Ease of Paying when Boarding	80%	83%	67%	75% (▲)	79%	84%
ORCA Card	83%	87%	77%	83%	91%	90%
**Ease of Loading a Pass **	-	77%	-	-	-	-
**Ease Adding Value E-Purse **	70%	70%	76%	67%	-	67%
Availability of Locations to Buy Pass / Add Value to E-Purse	60%	50%	64%	59%	59%	55%

Results not shown if base sizes are < 35

The percentage of Riders very satisfied with Ease of Paying Fares when Boarding and Overall Satisfaction with ORCA Cards increased significantly among Regular Riders.

While satisfaction with the availability of locations to buy a pass or add value to an E-Purse is lower for all segments, the decrease is not statistically significant due to relatively small base sizes.

Table 81: Fare Payment: Changes in Very Satisfied Ratings by Rider Status

	Very Satisfied			
	REGULAR Riders		INFREQUENT Riders	
	2013	2014	2013 **	2014 **
Average: Fare Payment	78%	79%	71%	72%
Ease of Paying when Boarding	79%	84% (▲)	71%	77%
ORCA Card	83%	89% (▲)	83%	83%
**Ease of Loading a Pass **	79%	80%	-	-
Ease Adding Value E-Purse	74%	69%	68%	67%
Availability of Locations to Buy Pass / Add Value to E-Purse	65%	56%	55%	49%

Results not shown if base sizes are < 35

Key Drivers Analysis

Only one element of service—Ease of Paying Fares when Boarding—was asked of all riders. Other questions were asked of different groups of riders based on their personal ORCA Card, pass, and E-Purse use. Because large numbers of respondents were not asked questions about some elements of service contained within this dimension, the regression analysis required for Key Drivers Analysis for Fare Payment cannot be used.

FINDINGS: PERSONAL SAFETY

In addition to questions on Riders' satisfaction with personal safety (covered in the Service Quality section), questions were included to address Riders' concerns regarding safety and their perceptions of Metro's efforts to improve safety.

Summary

Topic	What We Found		What It Means
Concerns about Safety	One out of five Riders state that they avoid riding the bus or streetcar due to concerns about personal safety. This percentage has decreased significantly from 2012 when this question was first asked.	**2012　　2013　　2014** **Avoid Riding Due to Concerns about Safety** 23%　　22%　　20%▼ *Significant increase (▲) or (▼) from baseline (2012)*	Metro's focus on safety has clearly had an impact both in terms of Rider satisfaction as discussed in the service quality analysis but also in Riders' stated behaviors.
Attitudes toward Metro's Efforts to Improve Safety	The extent to which Riders strongly agree that Metro provides a safe and secure transportation environment and is proactive in its efforts to improve safety and security increased significantly. While the percentage who strongly agree that they feel safer riding now than a year ago decreased, the percentage who disagree decreased steadily—from 36% in 2012 to 34% in 2013 to 29% in 2014.	**% Strongly Agree** **2012　　2013　　2014** **Provides a Safe and Secure Environment** 42%　　35%▼　　49%▲ **Is Proactive in Efforts to Improve Safety** 27%　　26%　　33%▲ **Feel Safer Riding Now than a Year Ago** 37%　　42%▲　　38%▼ *Significant increase (▲) or (▼) from previous year*	Rider attitudes are clearly translating into behaviors. As noted above, fewer Riders are avoiding transit due to concerns about safety. There has been an increase in the percentage of Riders stating that they sometimes or frequently ride when it is dark—67% in 2014 compared to 55% in 2013.
Safety Using Public Transit in Downtown Seattle	Riders who use Metro in downtown Seattle are increasingly likely to strongly agree that it is safe to use transit during the daytime and when it is dark. In addition, far fewer Riders state that it is not safe.	**Safe to Use Transit in Downtown Seattle** **2013　　2014** **% Strongly Agree** **During the Day**　61%　　73%▲ **% Strongly Agree** 16%　　28%▲ **When It Is Dark**　**% Disagree** 38%　　25%▼ *Significant increase (▲) or (▼) from previous year*	Again, Metro's strong focus on safety is paying off. Metro should continue to work with the city and other stakeholders on these efforts.

Concerns about Safety

One out of five Riders state that they avoid riding the bus or streetcar due to concerns about personal safety.

- The percentage that avoid riding has decreased significantly from 2012, the first year this question was asked.

Figure 103: Extent to Which Riders Avoid Riding Due to Concerns about Safety
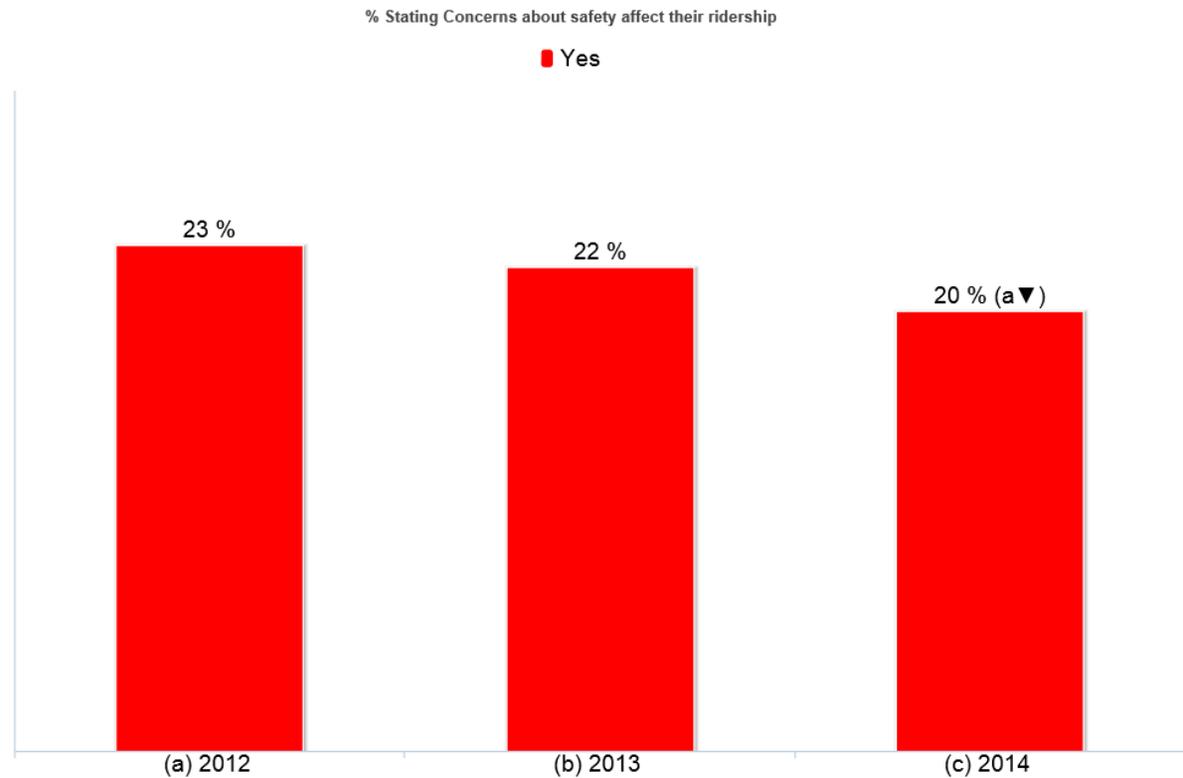
% Stating Concerns about safety affect their ridership

■ Yes

	23 %	22 %	20 % (a▼)
	(a) 2012	(b) 2013	(c) 2014

Questions: PS3A   *Do you avoid riding the bus or streetcar due to concerns about your personal safety?*
(IF YES, READ: Would that be frequently, sometimes, or rarely?)

Base: Regular and Infrequent Riders

	2012	2013	2014
n	1,218	1,395	1,102
nw	1,218	1,395	1,161

▲ / ▼ *indicates a statistically significant change from baseline year (2012)*

Differences by Rider Status and Area of Residence

There are no significant differences between the different Rider segments.	*Table 82: Extent to Which Riders Avoid Riding Due to Concerns about Safety by Rider Status*

Avoid Riding Due to Concerns About Safety

	(a) 2012	(b) 2013	(c) 2014
Regular Riders	22%	16%	19%
Infrequent Riders	24%	31%	21%
Frequent Regular Riders	20%	14%	18%
Moderate Regular Riders	26%	21%	19%

The decrease in the percentage saying they avoid riding due to concerns about safety is due largely to the decrease since 2012 among Seattle / North King County Riders.	*Table 83: Extent to Which Riders Avoid Riding Due to Concerns about Safety by Area of Residence*

Avoid Riding Due to Concerns About Safety

	(a) 2012	(b) 2013	(c) 2014
Seattle / N. King	25%	21%	20% (a▼)
South King	24%	23%	27%
East King	14%	21%	12%

Frequency with Which Riders Concerned about Safety Avoid Riding

In 2014, the question was modified to provide greater insight into the frequency with which Riders avoid riding due to concerns about safety.

- Among the 20 percent who say they avoid riding due to concerns about safety, one out of five say they frequently avoid riding due to safety concerns, and half say they sometimes avoid riding.

Figure 104: Frequency with Which Riders Concerned about Safety Avoid Riding
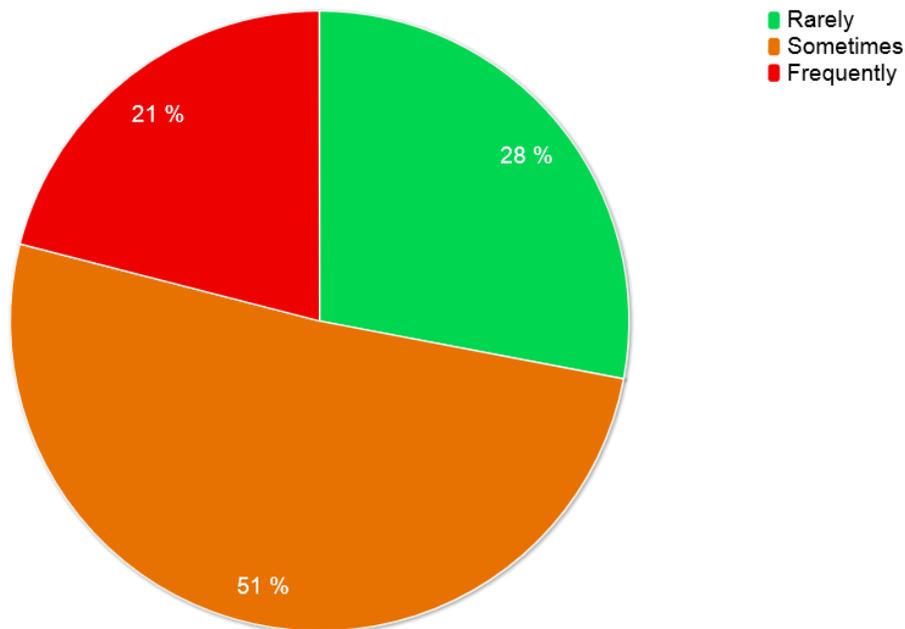
Legend:
- Rarely
- Sometimes
- Frequently

28 %
51 %
21 %

Questions: PS3A   *Do you avoid riding the bus or streetcar due to concerns about your personal safety?*
(IF YES, READ: Would that be frequently, sometimes, or rarely?)
Base: Regular and Infrequent Riders who avoid riding due to concerns about safety; Year: 2014

	2014
n	*209*
n_w	*227*

Attitudes toward Metro's Efforts to Improve Safety

Extent to Which Riders Feel Metro Provides a Safe and Secure Transportation Environment

The vast majority of Riders agree that Metro provides a safe and secure transportation environment.

- After decreasing between 2012 and 2013, the percentage of Riders who strongly agree that Metro provides a safe and secure transportation environment increased significantly and is at its highest since the baseline (2012) year when this question was added.

Figure 105: Extent to Which Riders Agree / Disagree that Metro Provides a Safe and Secure Transportation Environment

Agree / Disagree: Provides a safe and secure transportation environment

Year	Disagree	Somewhat Agree	Strongly Agree
2014	-7 %	41 % (▼)	49 % (▲)
2013	-9 %	54 %	35 % (▼)
2012	-7 %	49 %	42 %

■ Disagree ■ Somewhat Agree ■ Strongly Agree
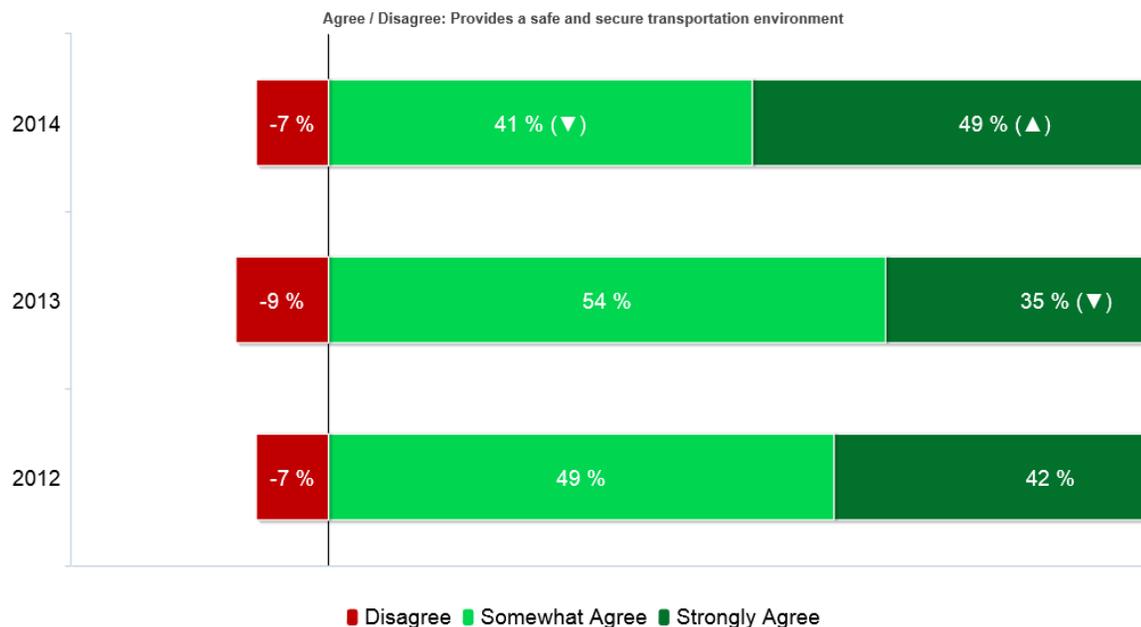
Questions: PS5   As I read each of the following statements please tell me if you agree or disagree with" Metro provides a safe and secure transportation environment."
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

Base: Regular and Infrequent Riders

	2012	2013	2014
n	1,218	1,395	1,161
n_w	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

While Riders countywide agree that Metro provides a safe and secure transportation environment, strong agreement is highest among:

- Riders living in East King County
- Regular Riders

Table 84: Extent to Which Riders Agree / Disagree that Metro Provides a Safe and Secure Transportation Environment by Area of Residence and Rider Status

	2014		
	(a) Seattle / N. King	**(b) South King**	**(c) East King**
Total Agree (Very & Somewhat)	88% (c▼)	88% (c▼)	95% (a▲,b▲)
Strongly Agree	43% (c▼)	45% (c▼)	61% (a▲,b▲)
Disagree	8% (c▲)	9% (c▲)	3% (a▼,b▼)

	2014			
	(a) REGULAR Riders	**(b) Frequent Regular Riders**	**(c) Moderate Regular Riders**	**(d) INFREQUENT Riders**
Total Agree (Very & Somewhat)	90%	91%	89%	90%
Strongly Agree	53% (d▲)	53% (d▲)	54% (d▲)	42% (a▼,b▼,c▼)
Disagree	8%	7%	8%	6%

Extent to Which Riders Feel Metro Has Been Proactive in Improving Safety and Security

The vast majority of Riders also agree that Metro has been very proactive in improving safety and security. However, the strength of agreement is less than that for providing a safe and secure environment.

- The changes in Riders' attitudes as to whether Metro has been proactive in improving safety and security parallel the changes seen for providing a safe and secure environment. That is, after decreasing between 2012 and 2013, the percentage of Riders who strongly agree that Metro has been proactive in its efforts to improve safety and security increased significantly and is at its highest since the baseline (2012) year when this question was added.

Figure 106: Extent to Which Riders Agree / Disagree that Metro Has Been Proactive in Improving Safety and Security

Agree / Disagree: Has been very proactive in improving safety and security

Year	Disagree	Somewhat Agree	Strongly Agree
2014	-13 % (▼)	37 %	33 % (▲)
2013	-20 % (▲)	41 % (▼)	26 %
2012	-13 %	46 %	27 %

■ Disagree ■ Somewhat Agree ■ Strongly Agree
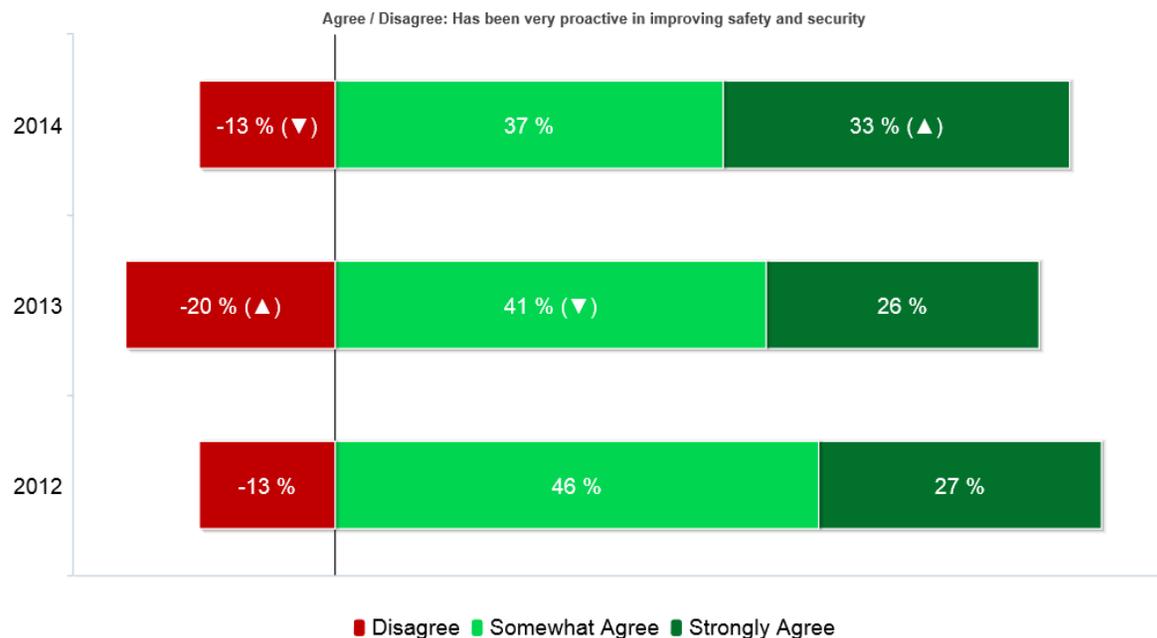
Questions: PS5   As I read each of the following statements please tell me if you agree or disagree with "Metro has been very proactive in improving safety and security."
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

Base: Regular and Infrequent Riders

	2012	2013	2014
n	1,218	1,395	1,161
nw	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

While Riders countywide agree that Metro has been proactive in improving safety and security, strong agreement is highest among:

- Riders living in South County
- Moderate Regular Riders

Table 85: Extent to Which Riders Agree / Disagree that Metro Has Been Proactive in Improving Safety and Security by Area of Residence and Rider Status

	2014		
	(a) Seattle / N. King	(b) South King	(c) East King
Total Agree (Very & Somewhat)	68%	73%	72%
Strongly Agree	28% (b▼)	38% (a▲)	35%
Disagree	13%	13%	11%

	2014			
	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
Total Agree (Very & Somewhat)	72%	71%	73%	69%
Strongly Agree	35%	33%	40% (d▲)	30% (c▼)
Disagree	14%	15%	12%	10%

Extent to Which Riders Feel Safer than a Year Ago

Over the years Riders have had decidedly mixed opinions as to whether they feel safer, less safe, or no different.

- However, the improvements in satisfaction with safety (discussed in the service quality section of the report) and improving attitudes (discussed above) do not appear to have translated into Riders saying they feel safer.
- Instead we see a decrease in the percentage saying they feel less safe and an increase in the percentage saying they neither agree nor disagree that they feel safer.

Figure 107: Extent to Which Riders Agree / Disagree that They Feel Significantly Safer than a Year Ago
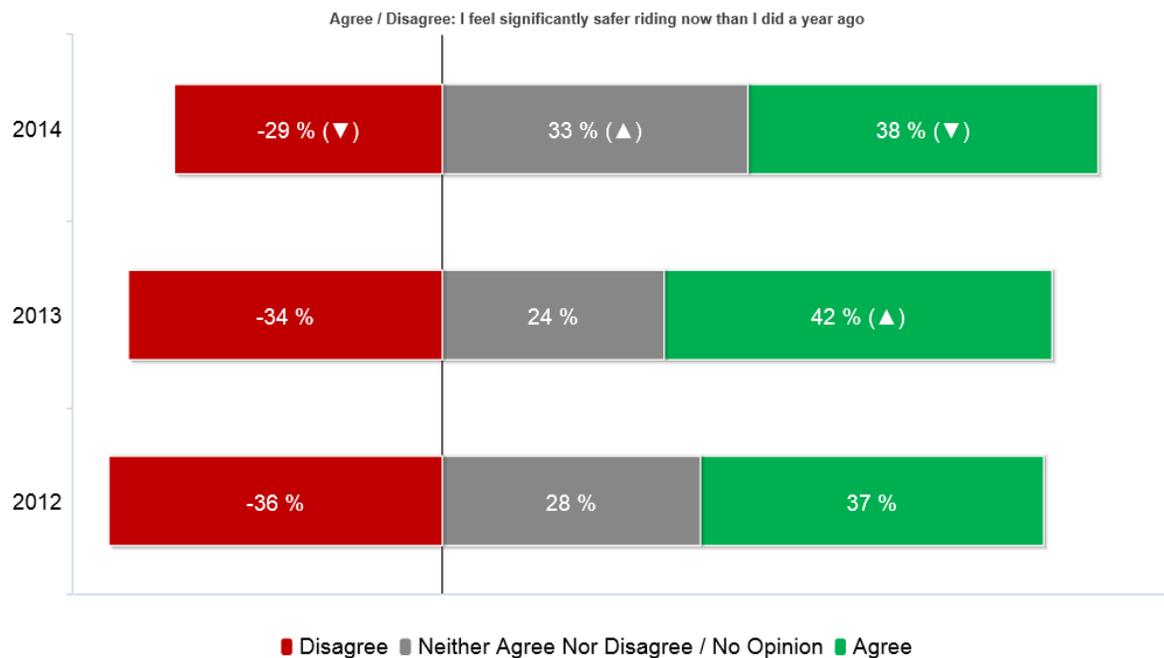
Agree / Disagree: I feel significantly safer riding now than I did a year ago

Year	Disagree	Neither Agree Nor Disagree / No Opinion	Agree
2014	-29 % (▼)	33 % (▲)	38 % (▼)
2013	-34 %	24 %	42 % (▲)
2012	-36 %	28 %	37 %

■ Disagree ■ Neither Agree Nor Disagree / No Opinion ■ Agree

Questions: PS5   As I read each of the following statements please tell me if you agree or disagree with "I feel significantly safer riding Metro now than I did a year ago."
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

Base: Regular and Infrequent Riders

	2012	2013	2014
n	1,218	1,395	1,161
n_w	1,218	1,395	1,161

▲ / ▼ indicates a statistically significant change from previous year

The extent to which Riders agree or disagree that they feel significantly safer than a year ago varies significantly by area of residence.

- Seattle / North King County Riders are almost equally likely to agree and disagree that they feel safer than a year ago. Moreover, they are more likely than those in East King County to disagree.
- On the other hand, South and East King County Riders are more likely to agree that they feel safer.

There are no differences in the extent to which Regular and Infrequent Riders agree or disagree that they feel safer than a year ago.

Table 86: Extent to Which Riders Agree / Disagree that They Feel Significantly Safer than a Year Ago by Area of Residence and Rider Status

	2014		
	(a) Seattle / N. King	(b) South King	(c) East King
Total Agree (Very & Somewhat)	32% (b▼,c▼)	42% (a▲)	41% (a▲)
Neither Agree Nor Disagree	33%	29%	37%
Disagree	35% (c▲)	28%	23% (a▼)

	2014			
	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
Total Agree (Very & Somewhat)	38%	38%	40%	37%
Neither Agree Nor Disagree / No Opinion	30%	31%	28% (d▼)	37% (c▲)
Disagree	31%	31%	32%	26%

Safety Using Public Transportation in Downtown Seattle

In both 2013 and 2014, Riders agreed that it is safe to use public transportation in downtown Seattle during the day. • The percentage of Riders who strongly agree with this statement increased significantly in 2014.	Riders are less likely to agree that it is safe to use public transportation in downtown Seattle when it is dark. • However, the percentage of Riders who strongly disagreed with this statement decreased significantly in 2014. Moreover, the percentage who strongly agree increased.

Figure 108: Agree / Disagree: Safe to Use Transit Downtown during Day

61 %
33 %
73 % (▲)
24 % (▼)

2013
2014

■ Strongly Agree ■ Somewhat Agree ■ Disagree

Figure 109: Agree / Disagree: Safe to Use Transit Downtown after Dark

16 %
41 %
-38 %
28 % (▲)
43 %
-25 % (▼)

2013
2014

■ Strongly Agree ■ Somewhat Agree ■ Disagree

Questions: PS5 As I read each of the following statements please tell me if you agree or disagree with" It is safe to use public transportation in downtown Seattle during the daytime / after dark."
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?
Base: Regular and Infrequent Riders

	2013	2014
n	1,395	1,161
n_w	1,395	1,161

▲ / ▼ *indicates a statistically significant change from previous year*

Perceptions of safety using transit in downtown Seattle after dark increased for all Riders. These increases are significant for:

- Regular Riders, notably Moderate Regular Riders.

Table 87: Trends in Perceived Safety Using Transit in Downtown Seattle after Dark by Frequency of Riding

		2013	2014
REGULAR Riders	**Total Agree (Very & Somewhat)**	69%	72%
	Strongly Agree	23%	29% (▲)
	Disagree	27%	24%
Frequent Regular Riders	**Total Agree (Very & Somewhat)**	68%	73%
	Strongly Agree	25%	28%
	Disagree	28%	22%
Moderate Regular Riders	**Total Agree (Very & Somewhat)**	69%	70%
	Strongly Agree	21%	33% (▲)
	Disagree	27%	27%
INFREQUENT Riders	**Total Agree (Very & Somewhat)**	62%	69%
	Strongly Agree	17%	26%
	Disagree	35%	28%

Perceptions of safety using transit after dark increased for both men and women.

- However, the increase was greater among men than women.

Table 88: Trends in Perceived Safety Using Transit in Downtown Seattle after Dark by Gender

		2013	2014
Female	Total Agree (Very & Somewhat)	52%	63% (▲)
	Strongly Agree	14%	21% (▲)
	Disagree	43%	33% (▼)
Male	Total Agree (Very & Somewhat)	63%	80% (▲)
	Strongly Agree	19%	37% (▲)
	Disagree	32%	16% (▼)

Safety in Downtown Transit Tunnel

Overall satisfaction with Safety in the Downtown Transit Tunnel increased significantly in 2014.

- This increase in due to a significant decrease in the percentage dissatisfied.
- The percentage very satisfied did not change significantly, suggesting that the shift was from dissatisfied to somewhat satisfied.

Table 89: Satisfaction with Safety in Downtown Transit Tunnel
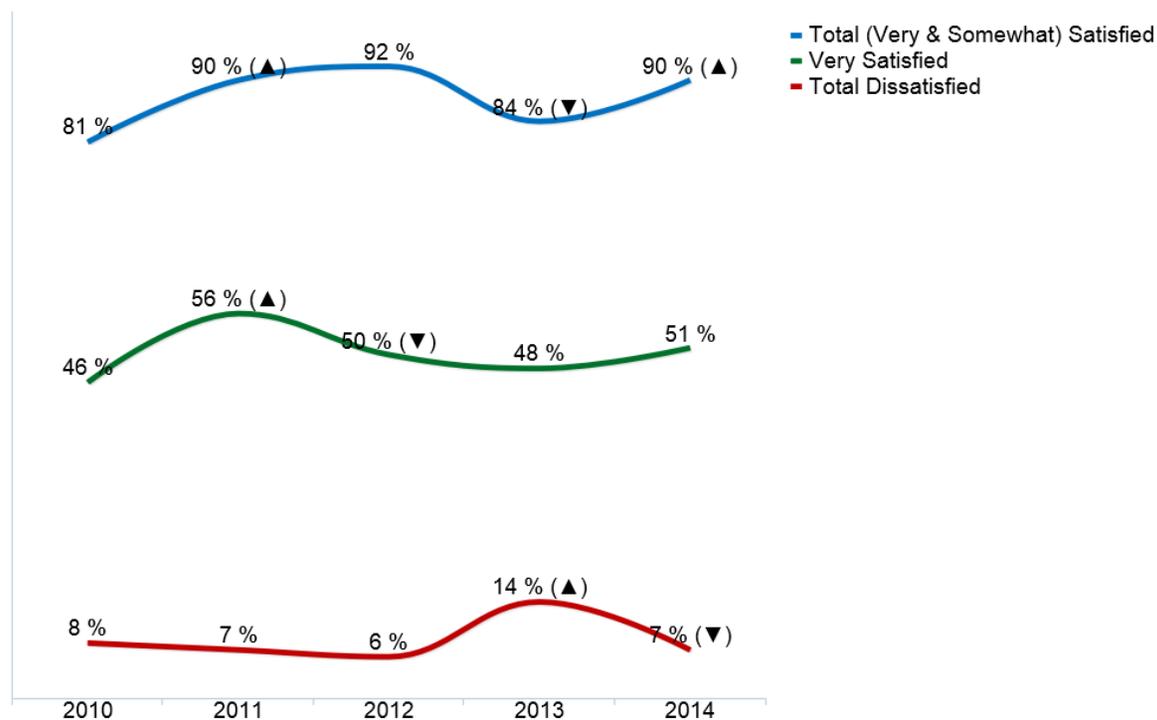
Legend:
- Total (Very & Somewhat) Satisfied
- Very Satisfied
- Total Dissatisfied

Total (Very & Somewhat) Satisfied: 81 %, 90 % (▲), 92 %, 84 % (▼), 90 % (▲)
Very Satisfied: 46 %, 56 % (▲), 50 % (▼), 48 %, 51 %
Total Dissatisfied: 8 %, 7 %, 6 %, 14 % (▲), 7 % (▼)

X-axis: 2010, 2011, 2012, 2013, 2014

Questions: PS5   As I read each of the following statements please tell me if you agree or disagree with" It is safe to use public transportation in downtown Seattle during the daytime / after dark."
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?
Base: Regular and Infrequent Riders who use Downtown Transit Tunnel

	2010	2011	2012	2013	2014
n	939	805	838	469	785
nw	933	372	866	299	798

▲ / ▼ *indicates a statistically significant change from previous year*

Stations and Locations In and Around Stations Where Riders Feel Unsafe

Those who were dissatisfied were asked a follow-up question to determine which tunnel stations were most unsafe.	Those who were dissatisfied were asked a follow-up question to determine where in or around tunnel stations they feel unsafe.
• Pioneer Square Station was mentioned most often.	• Riders feel most unsafe on the street near tunnel entrances.
Table 90: Tunnel Stations Where Riders Feel Most Unsafe	*Table 91: Locations In and Around Tunnel Stations that Feel Unsafe*
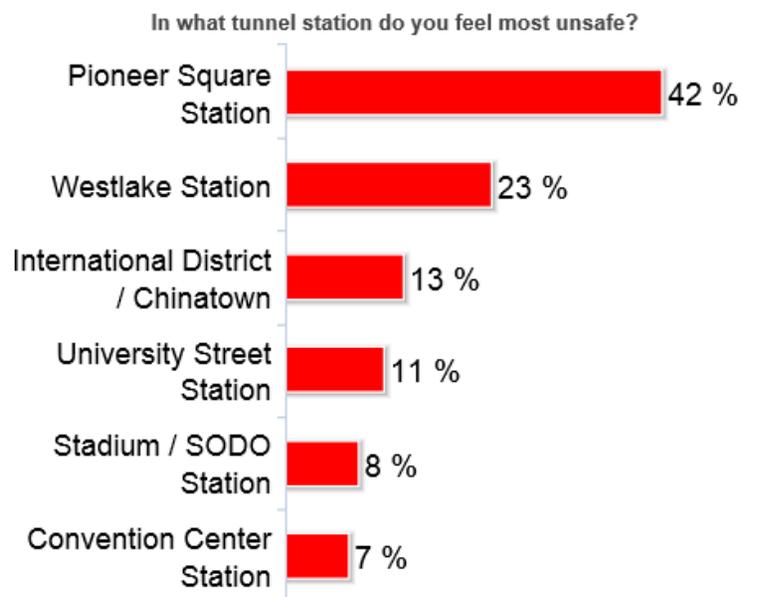
In what tunnel station do you feel most unsafe?

Station	%
Pioneer Square Station	42 %
Westlake Station	23 %
International District / Chinatown	13 %
University Street Station	11 %
Stadium / SODO Station	8 %
Convention Center Station	7 %

DTT1A   In which Downtown Transit Tunnel Station(s) do you feel most unsafe?
Base: Riders who are dissatisfied with safety in transit tunnel

	n	n_w
2014	*80*	*83*

Where in the tunnel do you feel unsafe?

Location	%
On the Street near Tunnel Entrances	41 %
On the Platforms Where Board The Bus or Train	33 %
On the Mezzanines	22 %
In the Elevators	19 %

DTT1B   Where in the tunnel do you feel most unsafe?
Base: Riders who are dissatisfied with safety in transit tunnel

	n	n_w
2014	*80*	*83*

IMPACT OF SERVICE CHANGE

Summary

Topic	What We Found		What It Means
Impact on Ridership	The majority of Riders were not impacted by the service change. Six percent of respondents contacted who were Riders immediately prior to or during the survey data collection period indicated that they were impacted and as a result of these service changes stopped riding. Three out of five Lost Riders now drive alone for the primary trip they formerly took on Metro.	**Impact of Service Change on Ridership** **Current Riders: No Impact** — **Current Riders: Impacted** — **Lost Riders** 72% — 22% — 6%	While these figures are generally positive, the impact of significant changes in service on ridership, customer goodwill, and travel behaviors should not be underestimated.
Impact on Overall Satisfaction with / Perceptions of Metro	The service change had a definitive impact on Riders'—both Current and Lost Riders'—overall satisfaction with Metro. Other key measures were also significantly impacted. It is also clear that the service change negatively impacted Riders' expectations and perceptions of Metro as shown in the table. Of note is the increase in the extent to which Impacted Riders disagree that Metro is innovative.	**Current Riders: No Impact** — **Current Riders: Impacted** — **Lost Riders** **Overall Satisfaction: % Satisfied** 93% — 79%▼ — 45%▼ **Expectations: % Positive** 74% — 55%▼ — 45%▼ **Advocacy: % Strongly Agree** 59% — 49%▼ — n.a. **Trust: % Strongly Agree** 49% — 39%▼ — 32%▼ **High Service Standards: % Strongly Agree** 39% — 28%▼ — 24%▼ **Is Innovative: % Disagree** 23% — 38%▲ — 48%▲	While Metro's overall satisfaction rating among Current Riders increased in 2014, the lower satisfaction ratings among those impacted by the service change would indicate that the increase in overall satisfaction would have been greater if the service changes did not occur. It is clear also that Metro has lost customer goodwill, which can be difficult to rebuild.

Topic	What We Found			What It Means
Impact on Satisfaction with Service Dimensions and Elements of Service	In addition to the impact on overall satisfaction, Current Riders impacted by the service change are less satisfied with specific aspects of service. In particular, they are less satisfied with: • Overall Level of Service, notably Frequency of Service and Travel Time • Comfort and Cleanliness Onboard, notably Availability of Seating and Ease of Loading and Unloading			As noted in the service quality discussions, Level of Service is the single most important service dimension and these two elements (Frequency of Service and Travel Time) are also important elements of service. Improvements in these two areas will positively influence all Riders. Comfort and Cleanliness Onboard is also an important service dimension. While Availability of Seating is as important as Overcrowding, it is clear that in the case of Impacted Riders, Availability of Seating is a concern as is Ease of Loading and Unloading (due to crowding).

Table (Impact on Satisfaction):

	Current Riders: No Impact	Current Riders: Impacted
% Satisfied (Very and Somewhat) Level of Service		
Overall Satisfaction	83%▲	64%▼
Frequency of Service	83%▲	56%▼
Travel Time	84%▲	65%▼
Comfort / Cleanliness Onboard		
Overall Satisfaction	80%▲	60%▼
Availability of Seating	84%▲	56%▼
Ease of Loading and Unloading	83%▲	58%▼

▲ / ▼ indicates a statistically difference between respondent groups

Topic	What We Found			What It Means
Impact on Goodwill and Customer Focus Indices	As discussed earlier, two indices were developed to summarize (1) the extent to which Riders have goodwill towards Metro and (2) the extent to which Riders feel Metro provides value and is focused on its customers. The service changes had a clear and negative impact on both goodwill and the extent to which Impacted Current and Lost Riders feel that Metro provides value and is focused on its customers.			Metro will have to work to rebuild lost goodwill—notably the extent to which Riders feel they can trust Metro's decisions and the direction the agency is taking. In addition, efforts will be needed to convince the public that Metro has consistently high standards for the service that it provides.

Table (Impact on Goodwill):

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
Goodwill Index			
	3.98	3.63▼	3.40▼
Value / Customer Focus Index			
	3.26	3.06▼	2.52▼▼

Indices are based on a 5-point scale where "1" represents "very low" and "5" represents "very high" goodwill or value and customer focus
▲ / ▼ indicates a statistically difference between respondent groups

Topic	What We Found			What It Means
Satisfaction with Information about Service Changes	Current Riders had mixed opinions about how effectively Metro provided information about the September 2014 service change—overall 62% were satisfied while 34% were dissatisfied. They were least satisfied with the extent to which they were able to provide public input.		**% AGREE**	While Metro was clearly effective in providing timely information Riders needed to adapt to the service changes, the perceived concerns about listening to customers could be a reason behind the lower satisfaction and perception scores among Impacted Riders.
		TIMELINESS OF NOTIFICATIONS	76%	
		PROVIDING NEEDED INFORMATION	70%	
		PROVIDING REASONS FOR CHANGES	64%	
		GETTING PUBLIC INPUT	53%	
		KNOWING WHO TO CONTACT	47%	
Likelihood of Future Ridership if Service Is Restored`	Despite the negative impact the service changes had on overall satisfaction and perceptions of Metro, the majority of Lost Riders would ride Metro again if service is restored.		**% OF LOST RIDERS**	Restoration of existing or new services that meet potential Rider expectations is likely to meet with success.
		VERY LIKELY	53%	
		SOMEWHAT LIKELY	28%	
		NEITHER LIKELY NOR UNLIKELY	10%	
		NOT LIKELY	9%	

Impact on Ridership

Riders (Current Riders and those who rode immediately prior to the service change and reported stopping because of the change) were asked a number of questions to determine the overall impact of the service change on market share. Based on responses to these questions they are placed into three segments:

1. **Current Riders: No Impact:** This segment consists of Regular and Infrequent Riders who reported no impact from the service changes.
2. **Current Riders: Impacted:** This segment consists of Regular and Infrequent Riders who reported they were impacted in some way by the service changes but continued riding.
3. **Lost Riders:** This segment consists of those contacted who indicated that they rode Metro immediately prior to or during the survey period but stopped riding as a result of the service change.

Nearly three out of four respondents contacted indicated that they were not impacted by the service change (Current Riders: No Impact).

- Nearly one out of four were impacted but are still riding (Current Riders: Impacted).

Six percent of respondents contacted are Lost Riders (stopped riding as a result of the service changes).

Figure 110: Percentage of Riders Impacted by Service Change
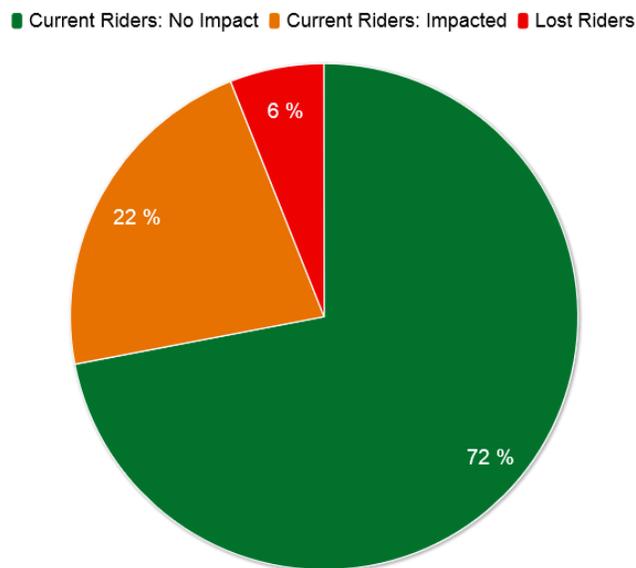
■ Current Riders: No Impact ■ Current Riders: Impacted ■ Lost Riders

6 %
22 %
72 %

S6C   Were you or any other member of your household affected by the changes to or cuts in Metro service that were made on September 27, 2014? S6E   How has your use of Metro changed as a result of this service change? S6F Did you or any other member of your household stop riding Metro because of the changes to or cuts in Metro service that were made on September 27, 2014?
Base: Current Regular and Infrequent Riders and those contacted who said they were Riders immediately prior to or during the survey period but stopped riding because of the service change.

	n	nw
2014	*1,529*	*1,528*

Differences in Impacts on Riders by Area of Residence and Current Rider Status

Among Current and Lost Riders, the impact of the service change was greatest among those living in East King County.	Table 92: Impact of Service Change on Ridership by Area of Residence

	(a) Seattle / N. King	(b) South King	(c) East King
Current Riders: No Impact	73% (c▲)	75% (c▲)	68% (a▼,b▼)
Current Riders: Impacted	23%	20%	23%
Lost Riders	4% (c▼)	6% (c▼)	9% (a▲,b▲)

Base: Current Regular and Infrequent Riders and those contacted who said they were Riders immediately prior to or during the survey period but stopped riding because of the service change.

	Seattle / North King	South King	East King
n	687	416	426
n_w	580	482	466

Among those still riding (Current Riders), the impact was greater on Regular than Infrequent Riders. • Among Regular Riders, the impact was greater on Frequent than Moderate Regular Riders.	Table 93: Impact of Service Change on Ridership by Current Rider Status

	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
Current Riders: No Impact	70% (d▼)	67% (c▼,d▼)	74% (b▲,d▼)	88% (a▲,b▲,c▲)
Current Riders: Impacted	30% (d▲)	33% (c▲,d▲)	26% (b▼,d▲)	12% (a▼,b▼,c▼)

Base: Current Regular and Infrequent Riders.

	Regular Riders	Infrequent Riders	Frequent Regular Riders	Moderate Regular Riders
n	992	378	680	312
n_w	856	573	590	266

Characteristics of Riders Impacted by the Service Change

A review of the demographic characteristics of the three segments (Current Riders: No Impact; Current Riders: Impacted; and Lost Riders) found no significant differences.

Nearly one out of four Lost Riders were New Riders—that is, had started riding after September 2013.

- This is significantly higher than among Current Riders.

Among Current Riders, those impacted were more likely than those not impacted to be Experienced Riders.

Figure 111: Tenure Riding: Lost and Current Riders

■ New Rider ■ Experienced Rider

(a) Current Riders: 14 % (b▲,d▼) | 86 % (b▼,d▲)

(b) Current Riders: Impacted: 90 % (a▲,c▲,d▲)

(c) Current Riders: No Impact: 16 % (b▲,d▼) | 84 % (b▼,d▲)

(d) Lost Riders: 24 % (a▲,b▲,c▲) | 76 % (a▼,b▼,c▼)

Base: Current Regular and Infrequent Riders and Lost Riders

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
n	779	290	99
nw	854	273	40

There were no significant differences in the usual trip taken between Lost and Current Riders.

Among Current Riders, those impacted were more likely than those not impacted to be using Metro to get to work for their primary trip.

Figure 112: Trip Purpose: Lost and Current Riders

Legend: ■ To/From Work ■ To/From School ■ Non-Commute

(a) Current Riders: 48 % (b▼) | 9 % | 44 % (b▲)

(b) Current Riders: Impacted: 61 % (a▲,c▲,d▲) | 9 % | 30 % (a▼,c▼,d▼)

(c) Current Riders: No Impact: 43 % (b▼) | 9 % | 48 % (b▲)

(d) Lost Riders: 48 % (b▼) | 10 % | 42 % (b▲)

Base: Current Regular and Infrequent Riders and Lost Riders

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
n	779	290	99
nw	854	273	40

Current Riders: Impacted Response to Service Change

Nearly two out of five Impacted Current Riders indicated that they have changed the route they use.

Nearly three out of ten indicate they are riding less often.

Included in the other category are a variety of responses that suggest that Impacted Riders adjusted their travel patterns, such as:

- Walking further to bus stop
- Changing travel times
- Waiting longer for buses
- Sometime using another travel mode

Others suggested that the riding experience has changed, such as:

- Buses are more crowded
- Travel time is longer

In all instances, fewer than 5 percent of all respondents asked this question gave one of these other responses.

Figure 113: What Current Impacted Riders Are Doing Now

	Changed Routes / Riding Different Route	37 %
Riding Less Frequently	28 %
Other	27 %
Hasn't Changed	21 %
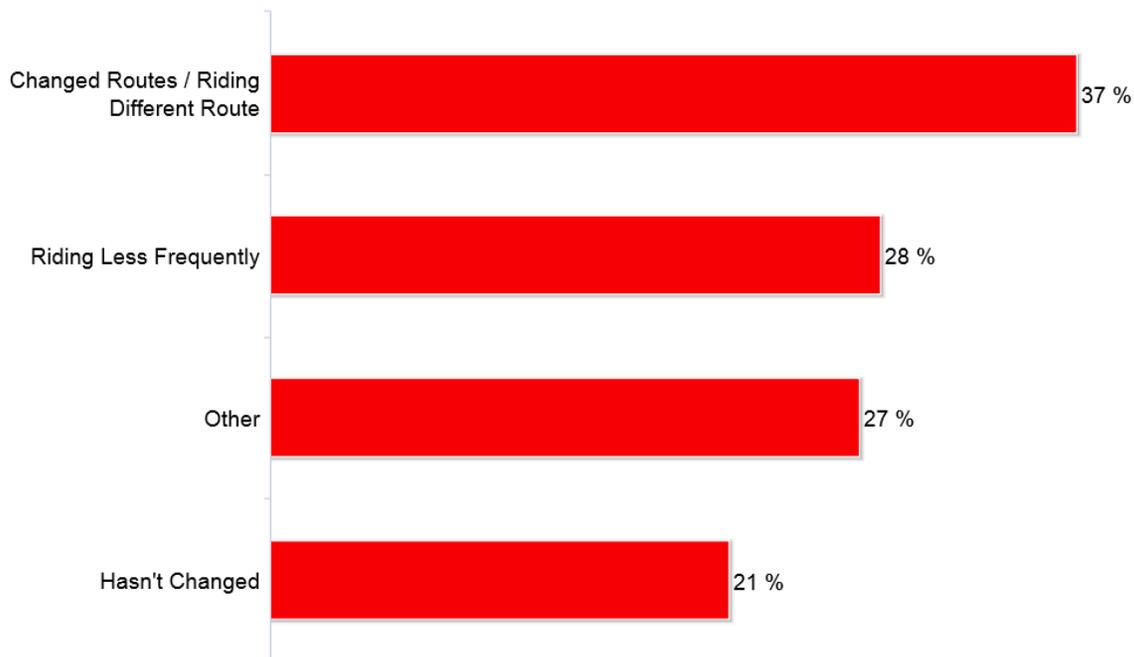
Base: Current Regular and Infrequent Riders impacted by service change

	All Current Riders
n	*346*
n_w	*329*

Changing routes is most common among Regular Riders. Infrequent Riders are more likely to say they are riding less often.

Figure 114: What Current Impacted Riders Are Doing Now by Frequency of Riding

	(a) REGULAR Riders	(b) Frequent Regular Riders	(c) Moderate Regular Riders	(d) INFREQUENT Riders
Changed Routes / Riding Different Route	40% (d▲)	40% (d▲)	40%	25% (a▼,b▼)
Riding Less Frequently	23% (c▼,d▼)	19% (c▼,d▼)	36% (a▲,b▲)	47% (a▲,b▲)
Hasn't Changed	20%	21%	17%	23%
Other	29%	32% (c▲)	20% (b▼)	19%

Base: Current Regular and Infrequent Riders Impacted by Service Change

	Regular Riders	Infrequent Riders	Frequent Regular Riders	Moderate Regular Riders
n	298	47	219	79
n_w	259	69	191	68

Lost Riders' Current Travel Behavior for Former Primary Trip on Metro

Three out of five Lost Riders now drive alone for the primary trip they formerly took on Metro.

Figure 115: Lost Riders' Current Travel Behavior for Former Primary Metro Trip

Driving Alone	60 %
Carpool / Driving With Someone Else	16 %
Stopped Making This Trip	8 %
Sound Transit Bus	3 %
Bicycle	3 %
Walk	3 %
Link Light Rail	1 %
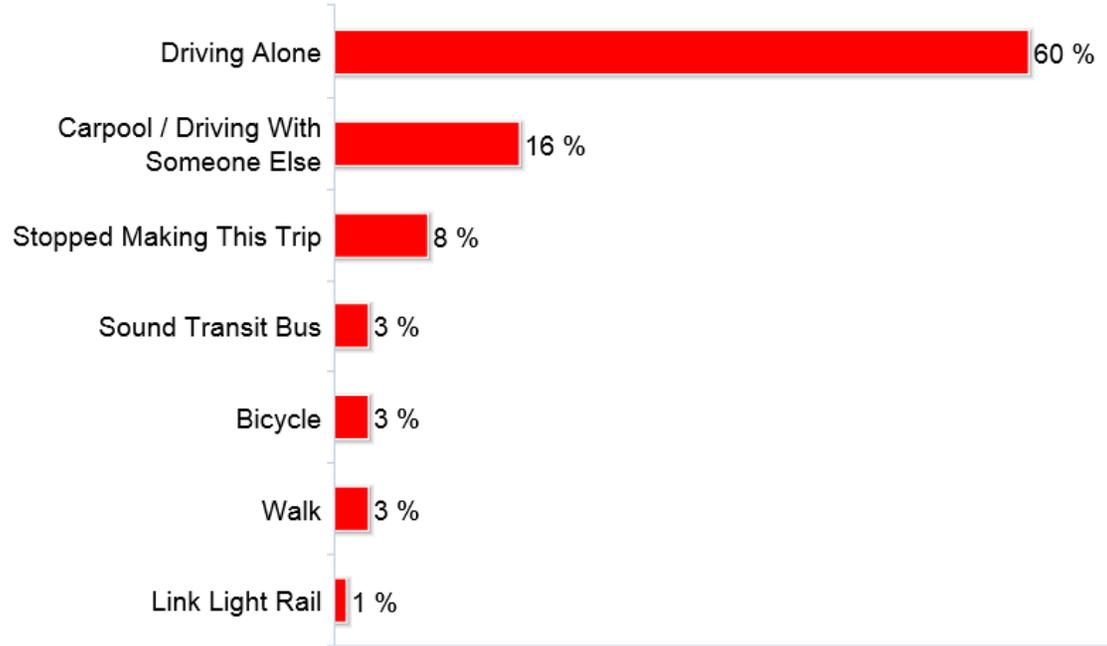
Base: Lost Riders

	n	*n$_w$*
Lost Riders	*99*	*40*

Satisfaction with Information about Service Changes

Current Riders had mixed opinions about how effectively Metro provided information about the September 2014 service changes.

They were most satisfied with:

- The timeliness of the notification
- Providing them with the information they needed about the changes

They were least satisfied with:

- Knowing who to contact to provide opinions
- Metro's getting public input about the service changes

Figure 116: Satisfaction with Information about Service Changes

Legend: ■ Total Dissatisfied ■ Somewhat Satisfied ■ Very Satisfied

	Total Dissatisfied	Somewhat Satisfied	Very Satisfied
Timeliness of notifications about services changes	-21 %	44 %	32 %
Providing information needed about service changes	-27 %	35 %	35 %
Providing information about the reasons for service changes	-34 %	35 %	29 %
Getting public input regarding service changes	-42 %	39 %	14 %
Knowing who to contact to provide opinions	-47 %	32 %	15 %
Average: Management of Service Change	-34 %	37 %	25 %

Question: SC1 I am going to ask you about your satisfaction with how well Metro managed this service change. As I read each item please tell me if you are satisfied or dissatisfied with how Metro managed this service change. Would that be very or somewhat [satisfied / dissatisfied]?

Base: Current Regular and Infrequent Riders

	n	n_w
2014	1,102	1,161

Impact on Overall Satisfaction with Metro and Satisfaction with Elements of Service

The service changes had a significant impact on Impacted Riders' overall satisfaction with Metro.

- Nearly one out of five (19%) Impacted Current Riders are dissatisfied compared to just 6 percent of Current Riders who experienced no impact.
- Over half of those no longer riding (Lost Riders) are dissatisfied with Metro.

Figure 117: Impact of Service Change on Overall Satisfaction with Metro
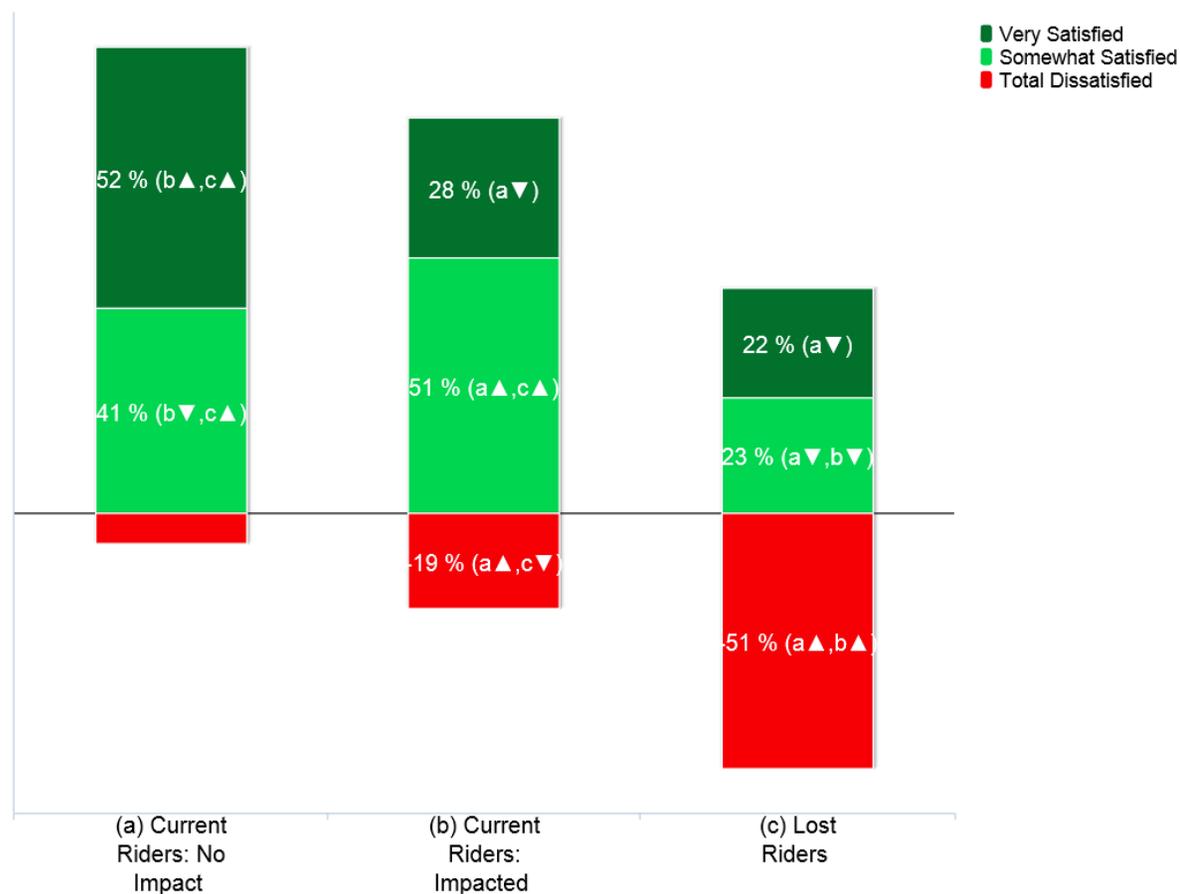
Legend:
- Very Satisfied
- Somewhat Satisfied
- Total Dissatisfied

(a) Current Riders: No Impact
- 52 % (b▲,c▲)
- 41 % (b▼,c▲)

(b) Current Riders: Impacted
- 28 % (a▼)
- 51 % (a▲,c▲)
- -19 % (a▲,c▼)

(c) Lost Riders
- 22 % (a▼)
- 23 % (a▼,b▼)
- 51 % (a▲,b▲)

Base: Current Regular and Infrequent Riders and Lost Riders; small percentages (<10%) not labeled

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
n	779	290	99
n_w	854	273	40

In addition to the impact on overall satisfaction the service change had a significant impact on Impacted Current Riders' satisfaction with elements of service.

Discriminant analysis was used to identify which of the major dimensions of service and individual elements of service were impacted.

The two overall dimensions most impacted were:

- Level of Service
- Comfort and Cleanliness Onboard

Figure 118: Impact of Service Change on Current Riders' Satisfaction on Overall Service Dimensions
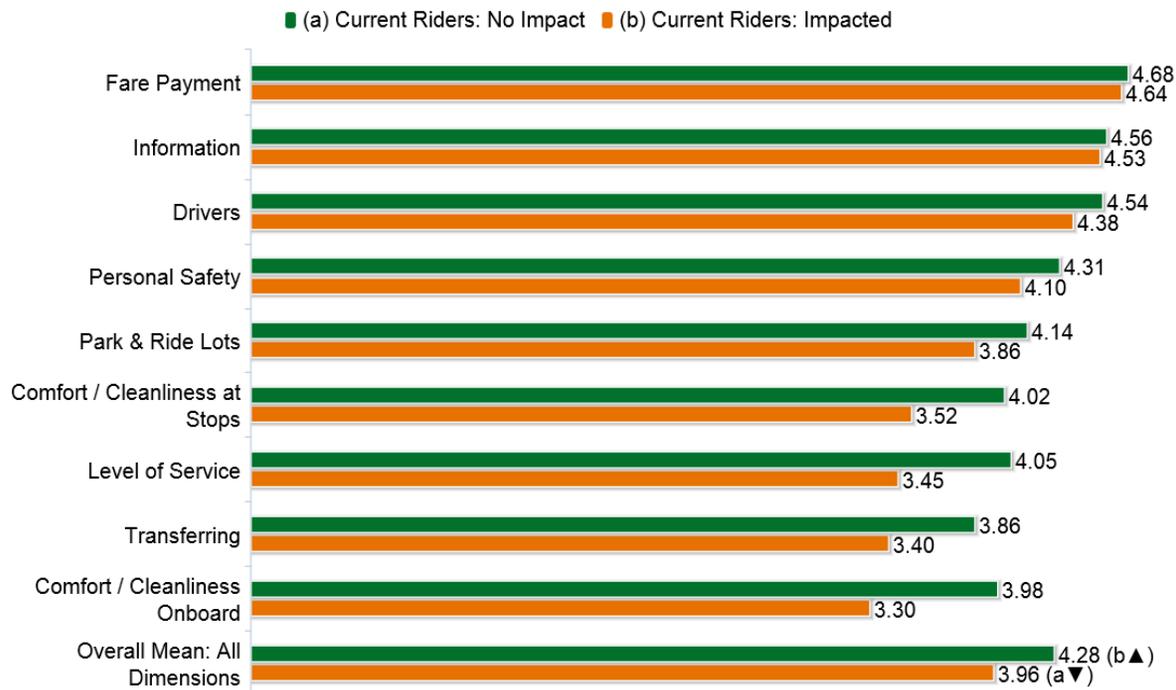
■ (a) Current Riders: No Impact ■ (b) Current Riders: Impacted

	(a) No Impact	(b) Impacted
Fare Payment	4.68	4.64
Information	4.56	4.53
Drivers	4.54	4.38
Personal Safety	4.31	4.10
Park & Ride Lots	4.14	3.86
Comfort / Cleanliness at Stops	4.02	3.52
Level of Service	4.05	3.45
Transferring	3.86	3.40
Comfort / Cleanliness Onboard	3.98	3.30
Overall Mean: All Dimensions	4.28 (b▲)	3.96 (a▼)

Base: Current Regular and Infrequent Riders

	Current Riders: No Impact	Current Riders: Impacted
n	779	290
n_w	854	273

Within the Level of Service dimension, the service change had the most impact on Impacted Current Riders' satisfaction with:

- Frequency of Service
- Travel Time

Figure 119: Impact of Service Change on Current Riders' Satisfaction with Elements of Service within Level of Service Dimension
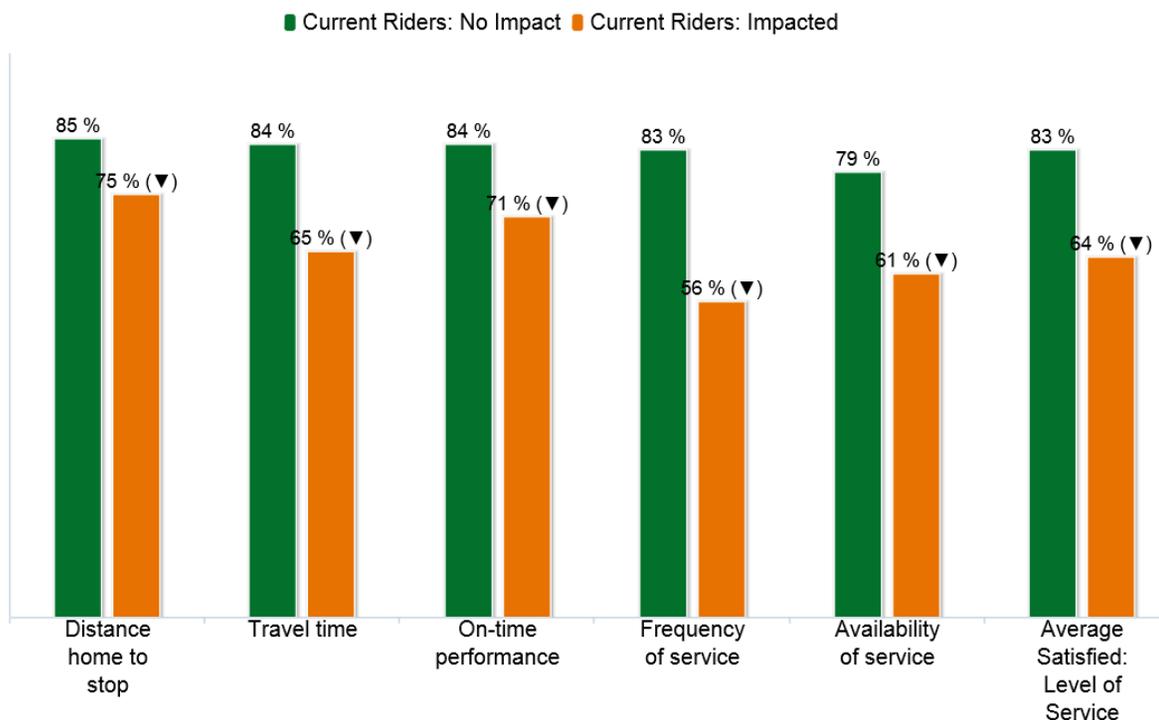
■ Current Riders: No Impact   ■ Current Riders: Impacted

	Distance home to stop	Travel time	On-time performance	Frequency of service	Availability of service	Average Satisfied: Level of Service
Current Riders: No Impact	85 %	84 %	84 %	83 %	79 %	83 %
Current Riders: Impacted	75 % (▼)	65 % (▼)	71 % (▼)	56 % (▼)	61 % (▼)	64 % (▼)

Base: Current Regular and Infrequent Riders

	Current Riders: No Impact	Current Riders: Impacted
n	779	290
nw	854	273

Within the Comfort and Cleanliness Onboard dimension, the service change had the most impact on Impacted Current Riders' satisfaction with:

- Availability of Seating
- Ease of Loading / Unloading due to crowding

Figure 120: Impact of Service Change on Current Riders' Satisfaction with Elements of Service within Comfort / Cleanliness Onboard Dimension

	Current Riders: No Impact	Current Riders: Impacted
n	779	290
n_w	854	273
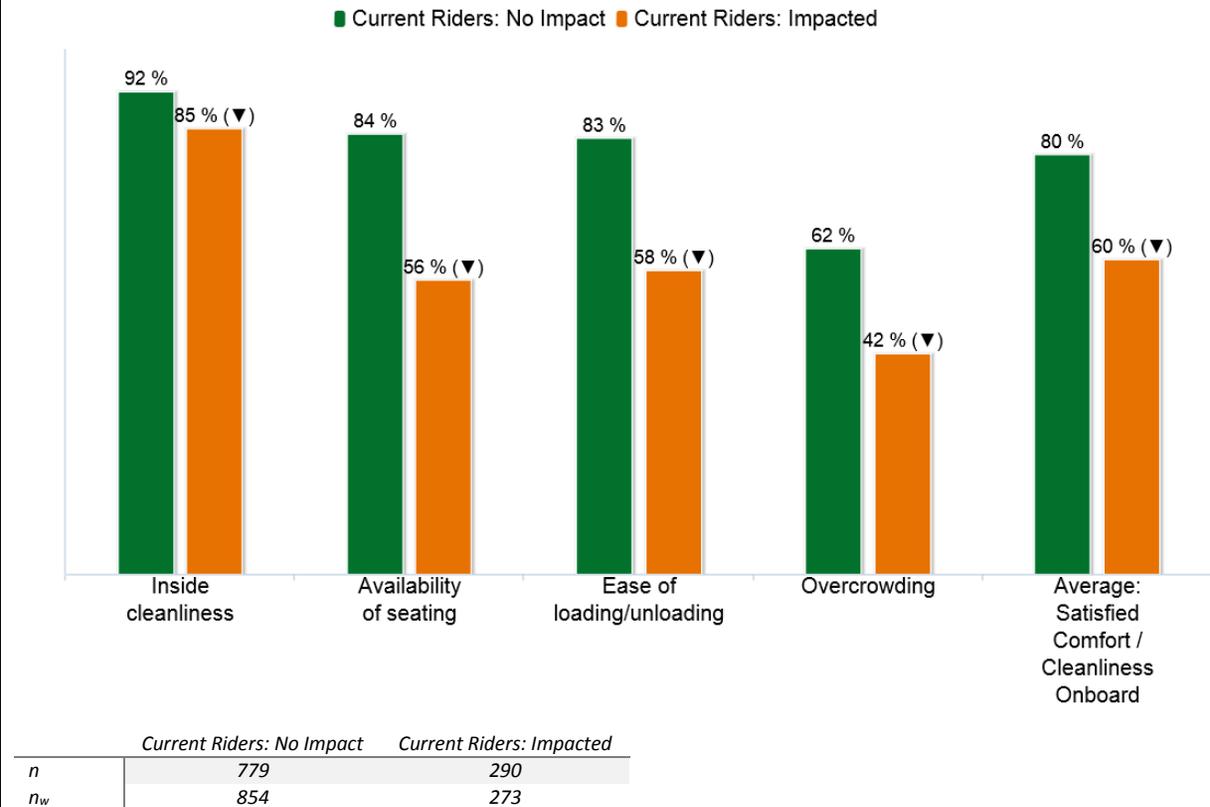
Impact on Perceptions of Metro

Lost Riders as well as Impacted Current Riders also have significantly lower expectations that Metro can deliver quality service.

Figure 121: Impact of Service Changes on Expectations for Service
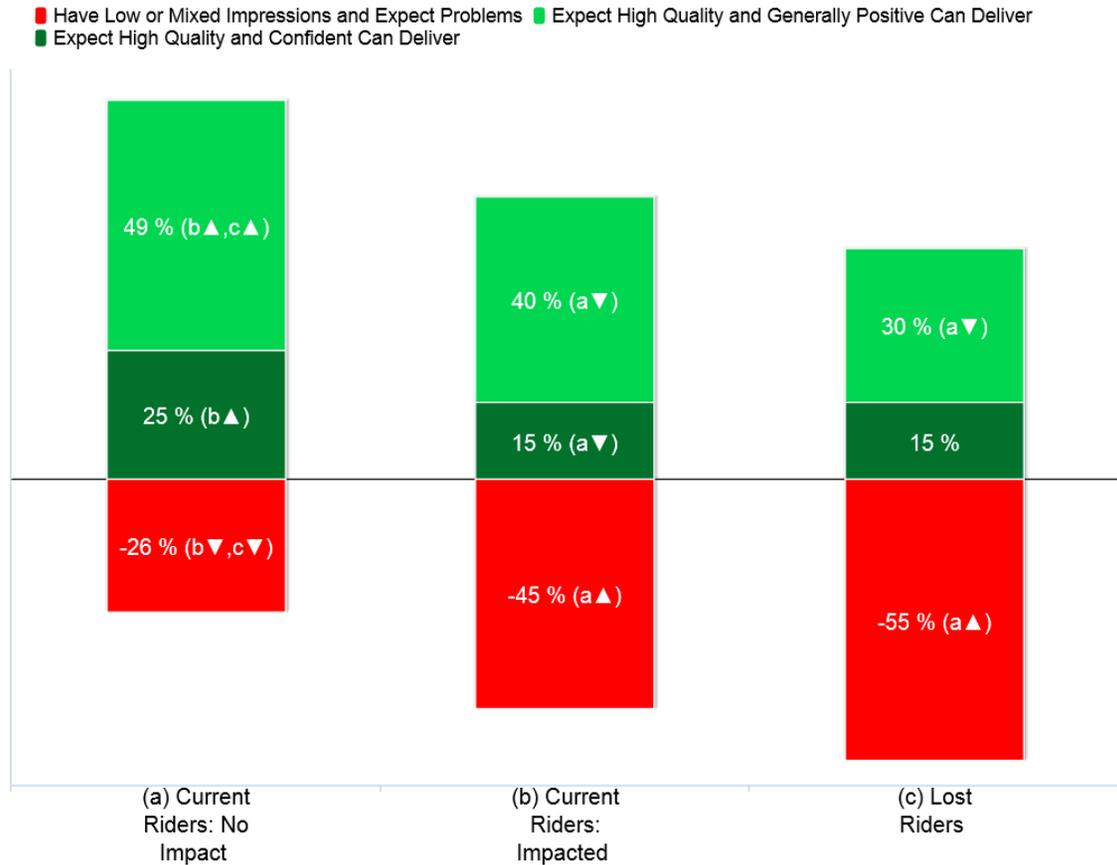
■ Have Low or Mixed Impressions and Expect Problems ■ Expect High Quality and Generally Positive Can Deliver
■ Expect High Quality and Confident Can Deliver

- 49 % (b▲,c▲)
- 25 % (b▲)
- -26 % (b▼,c▼)
- (a) Current Riders: No Impact

- 40 % (a▼)
- 15 % (a▼)
- -45 % (a▲)
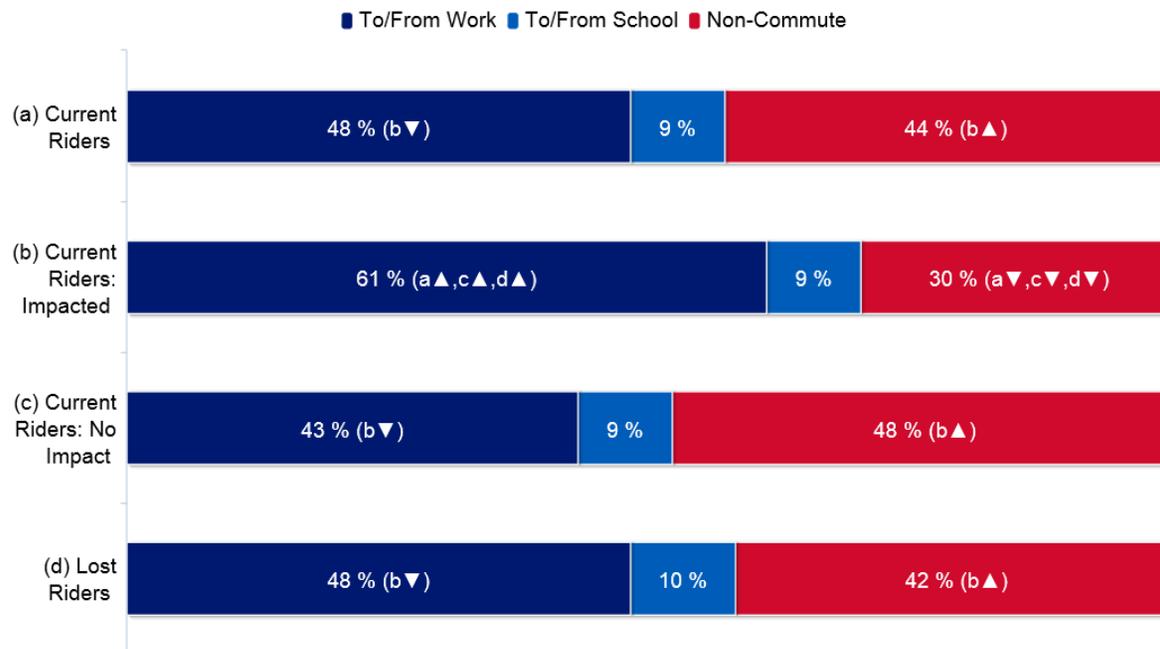- (b) Current Riders: Impacted

- 30 % (a▼)
- 15 %
- -55 % (a▲)
- (c) Lost Riders

Base: Current Regular and Infrequent Riders and Lost Riders

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
n	779	290	99
nw	854	273	40

Among Current Riders, the service change had some impact on the extent to which they say they like to ride Metro.

- Impacted Current Riders i are less likely to strongly agree and more likely to disagree that they like to be able to say they ride Metro.

Figure 122: Impact of Service Change on the Extent to Which Current Riders Would Like to Say They Ride Metro

Agree / Disagree: I like to be able to say I ride Metro

(a) Current Riders: No Impact — 30 % — 59 % (b▲)

(b) Current Riders: Impacted — -13 % (a▲) — 34 % — 49 % (a▼)

■ Disagree ■ Somewhat Agree ■ Strongly Agree
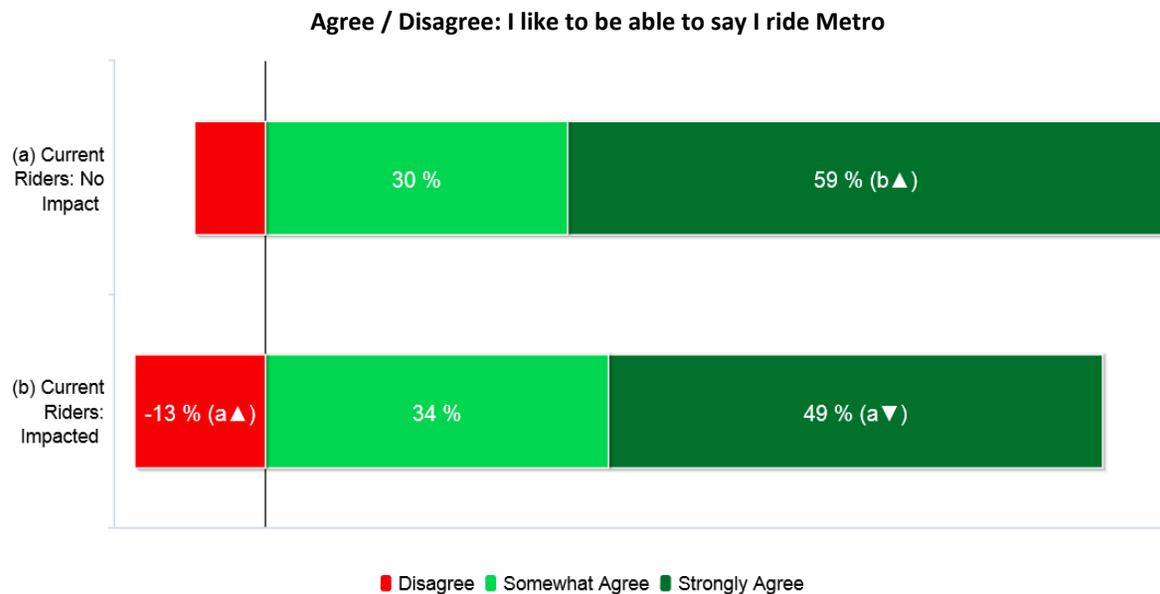
Base: Current Regular and Infrequent Riders; small percentages (<10%) not labeled

	Current Riders: No Impact	Current Riders: Impacted
n	374	134
nw	424	130

Consistent with the impact on overall satisfaction and expectations, the service changes had a negative impact on how Impacted Current Riders as well as Lost Riders see Metro as an agency they like / respect and/or trust.

- The service change had a greater negative impact on trust than on like and respect.

Figure 123: Impact of Service Changes on Agency Relations
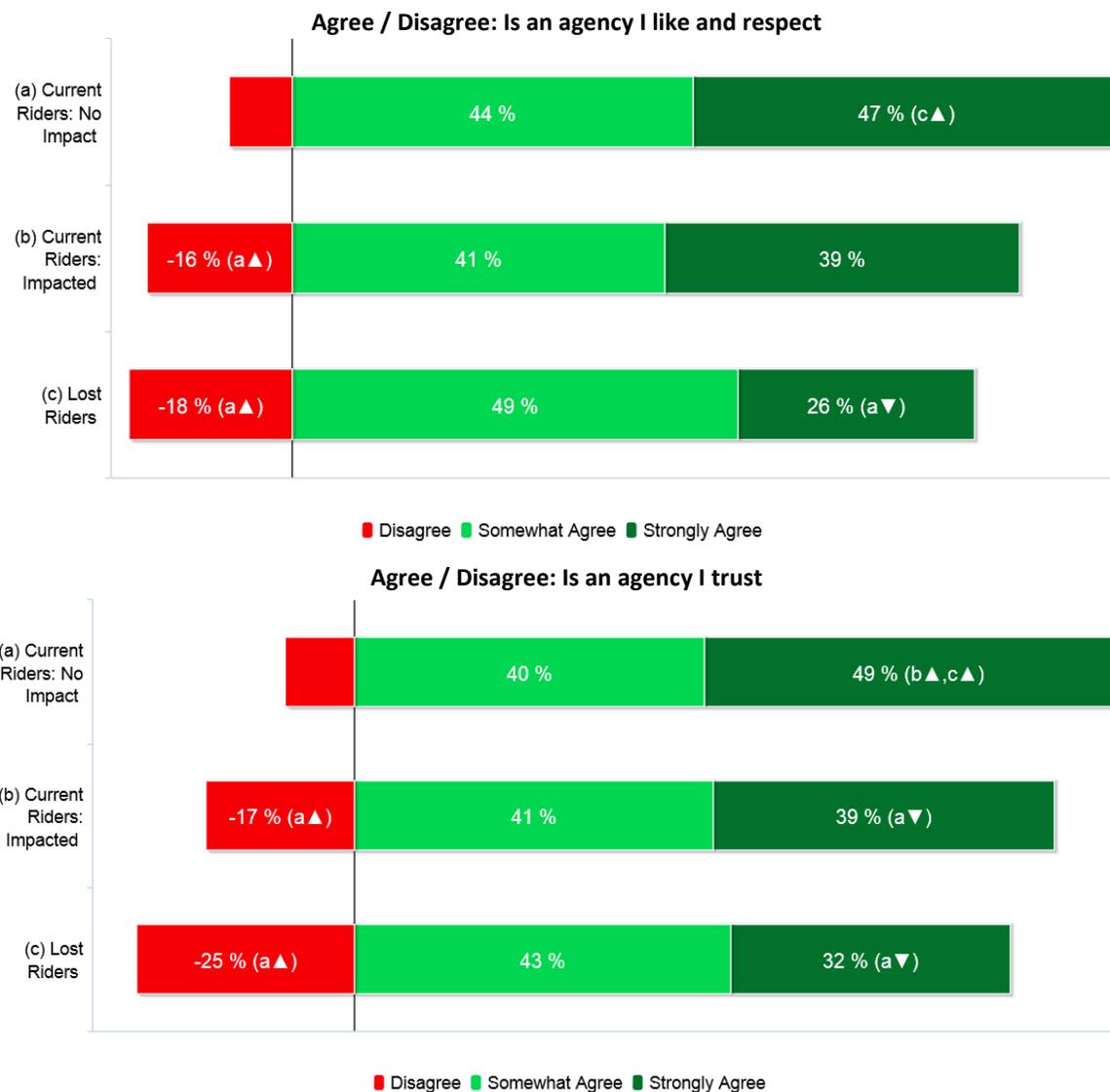
Agree / Disagree: Is an agency I like and respect

(a) Current Riders: No Impact — 44 % | 47 % (c▲)

(b) Current Riders: Impacted — -16 % (a▲) | 41 % | 39 %

(c) Lost Riders — -18 % (a▲) | 49 % | 26 % (a▼)

■ Disagree ■ Somewhat Agree ■ Strongly Agree

Agree / Disagree: Is an agency I trust

(a) Current Riders: No Impact — 40 % | 49 % (b▲,c▲)

(b) Current Riders: Impacted — -17 % (a▲) | 41 % | 39 % (a▼)

(c) Lost Riders — -25 % (a▲) | 43 % | 32 % (a▼)

■ Disagree ■ Somewhat Agree ■ Strongly Agree

Base: Current Regular and Infrequent Riders and Lost Riders; small percentages (<10%) not labeled

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
n	374	134	40
nw	424	130	16

The service changes had a significant negative impact on the extent to which Impacted Current Riders as well as Lost Riders believe that Metro provides high value—both in terms of the level of service provided and the value the agency places on its customers.

- Lost Riders are significantly more likely than Impacted and Non-Impacted Current Riders to disagree that Metro offers good value for the level of service provided.
- Lost Riders and, to a lesser extent, Impacted Current Riders are more likely to disagree that Metro values its customers.

Figure 124: Impact of Service Changes on Value
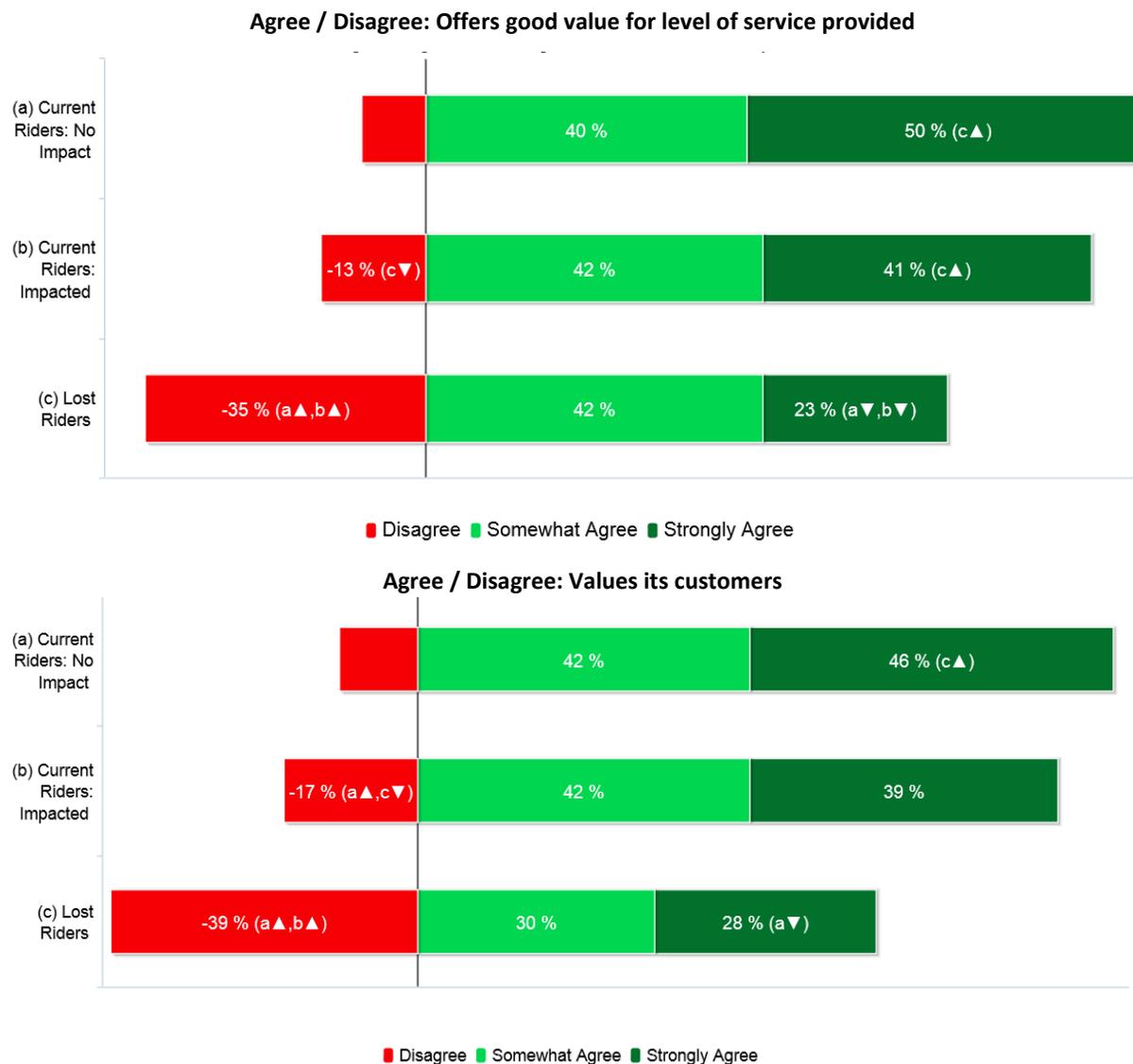
Agree / Disagree: Offers good value for level of service provided

	Disagree	Somewhat Agree	Strongly Agree
(a) Current Riders: No Impact		40 %	50 % (c▲)
(b) Current Riders: Impacted	-13 % (c▼)	42 %	41 % (c▲)
(c) Lost Riders	-35 % (a▲,b▲)	42 %	23 % (a▼,b▼)

■ Disagree ■ Somewhat Agree ■ Strongly Agree

Agree / Disagree: Values its customers

	Disagree	Somewhat Agree	Strongly Agree
(a) Current Riders: No Impact		42 %	46 % (c▲)
(b) Current Riders: Impacted	-17 % (a▲,c▼)	42 %	39 %
(c) Lost Riders	-39 % (a▲,b▲)	30 %	28 % (a▼)

■ Disagree ■ Somewhat Agree ■ Strongly Agree

Base: Current Regular and Infrequent Riders and Lost Riders; small percentages (<10%) not labeled

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
n	*374*	*134*	*40*
n_w	*424*	*130*	*16*

The service changes had a significant impact on the extent to which Riders believe that Metro provides high value—both in terms of the quality of service standards and customer service provided.

Figure 125: Impact of Service Changes on Perceived Service
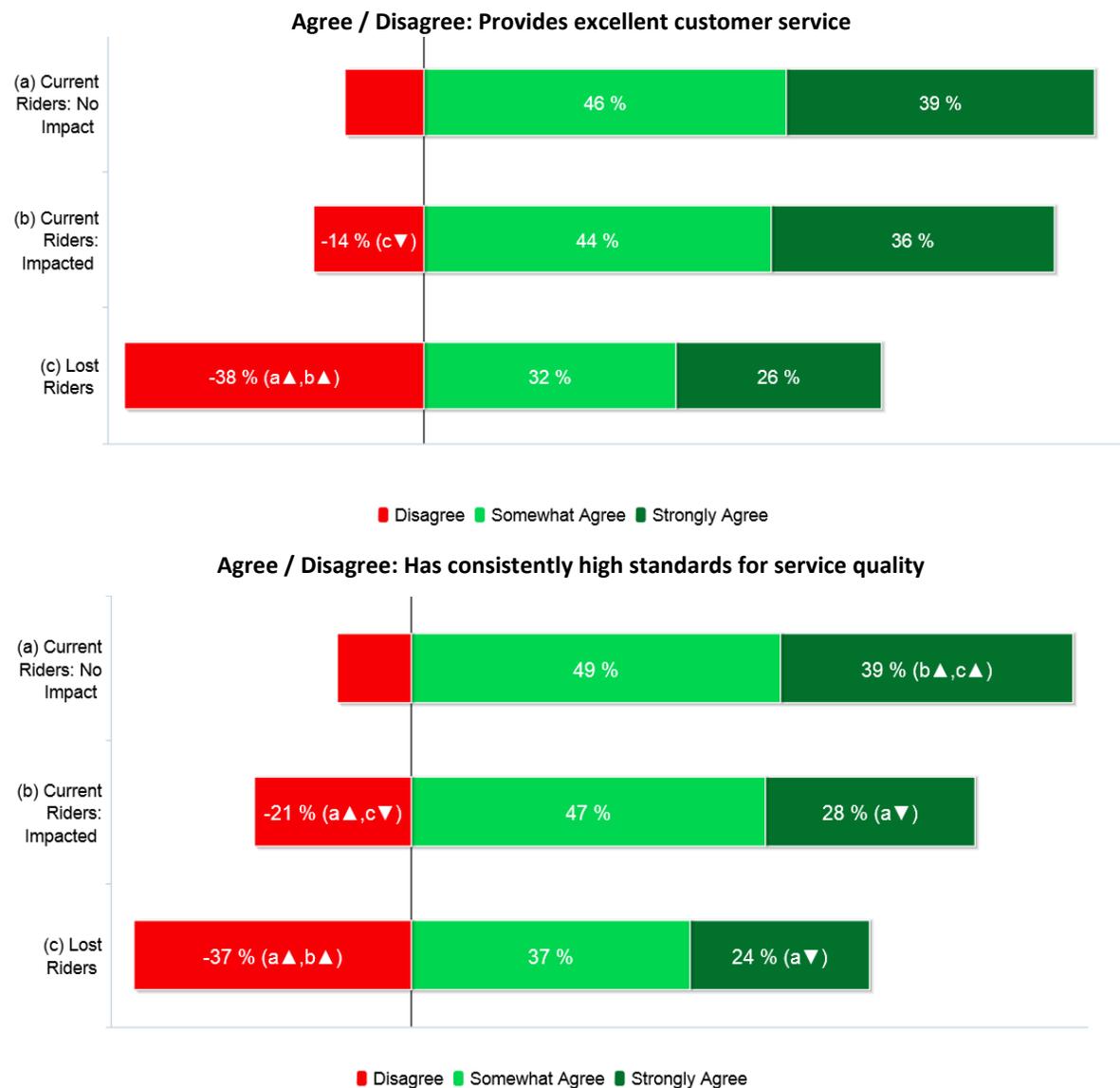
Agree / Disagree: Provides excellent customer service

	Disagree	Somewhat Agree	Strongly Agree
(a) Current Riders: No Impact		46 %	39 %
(b) Current Riders: Impacted	-14 % (c▼)	44 %	36 %
(c) Lost Riders	-38 % (a▲,b▲)	32 %	26 %

■ Disagree ■ Somewhat Agree ■ Strongly Agree

Agree / Disagree: Has consistently high standards for service quality

	Disagree	Somewhat Agree	Strongly Agree
(a) Current Riders: No Impact		49 %	39 % (b▲,c▲)
(b) Current Riders: Impacted	-21 % (a▲,c▼)	47 %	28 % (a▼)
(c) Lost Riders	-37 % (a▲,b▲)	37 %	24 % (a▼)

■ Disagree ■ Somewhat Agree ■ Strongly Agree

Base: Current Regular and Infrequent Riders and Lost Riders; small percentages (<10%) not labeled

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
n	374	134	40
n$_w$	424	130	16

Finally, the service change had a negative impact on the extent to which Impacted Current Riders as well as Lost Riders feel that Metro is innovative.

- Nearly half of all Lost Riders and two out of five Impacted Current Riders disagree that Metro is innovative, suggesting that the service changes had a greater impact on this specific than the other attitudes measured.

Figure 126: Impact of Service Changes on Perceptions that Metro Is Innovative
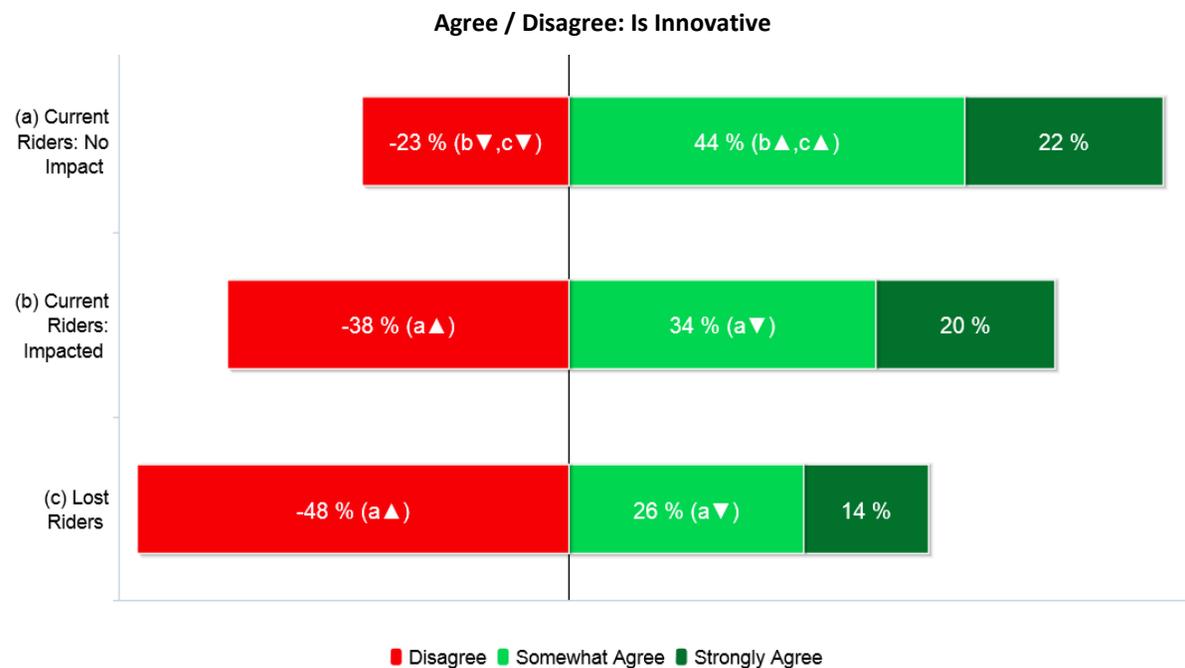
Agree / Disagree: Is Innovative

	(a) Current Riders: No Impact	(b) Current Riders: Impacted	(c) Lost Riders

Disagree ■ Somewhat Agree ■ Strongly Agree

Base: Current Regular and Infrequent Riders and Lost Riders

	Current Riders: No Impact	Current Riders: Impacted	Lost Riders
n	374	134	40
n_w	424	130	16

Likelihood of Future Ridership if Service Is Restored

Despite the negative impact the service changes had on overall satisfaction and perceptions of Metro, a large majority of Lost Riders would ride Metro again if service is restored.

- Over half say they would be very likely to ride again; an additional 28 percent say they would be somewhat likely.
- Only a small percentage (9%) of Lost Riders say they would be unlikely to ride in the future if service is restored.

Figure 127: Likelihood of Riding Metro if Service Is Restored

Very Likely
Somewhat Likely
Neither Likely Nor Unlikely
Not Very Likely
Not At All Likely

4 %
5 %
10 %
53 %
28 %
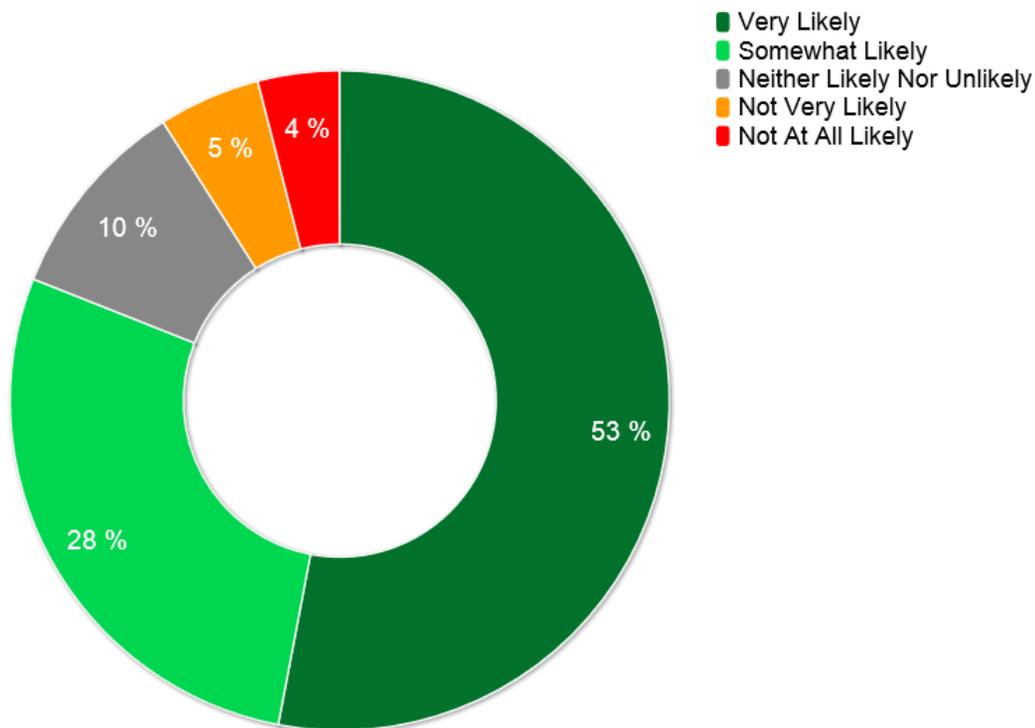
Base: Lost Riders

	n	nw
Lost Riders	99	40

APPENDIX

Sample Demographics

Table 94: Sample Demographics: Weighted and Unweighted

	UNWEIGHTED (n_w=1,101)	WEIGHTED (n_w=1,161)
GENDER		
MALE	47%	47%
FEMALE	53%	53%
AGE		
16–17	3%	3%
18–34	24%	23%
35–54	33%	33%
55+	39%	41%
MEAN	47.5	48.3
EMPLOYMENT STATUS*		
EMPLOYED	65%	65%
STUDENT	11%	11%
RETIRED	17%	17%
OTHER	16%	16%
INCOME		
<$35K	27%	26%
$35K –$55K	15%	14%
$55K –$75K	15%	16%
$75K –$100K	12%	12%
$100K+	31%	31%
MEDIAN		$67,988
HH COMP (16 YRS OF AGE+)		
SINGLE-PERSON	24%	24%
MULTIPERSON	76%	76%
RACE/ETHNICITY*		
HISPANIC	6%	6%
CAUCASIAN	75%	76%
ASIAN	11%	11%
BLACK	5%	4%
OTHER	4%	4%
VEHICLE ACCESS		
% W/ LICENSE	81%	83%
% W/ VEHICLES	87%	88%
MEAN # VEHICLES	1.67	1.73

Table 95: Demographics: Riders—2010-2014

	2010 (nw=1,161)	2011 (nw=1,161)	2012 (nw=1,161)	2013 (nw=1,161)	2014 (nw=1,161)
GENDER					
MALE	50%	53% (▲e)	53% (▲e)	51%	47% (▼b, ▼c)
FEMALE	50%	47% (▼e)	47% (▼e)	49%	53% (▲b, ▲c)
AGE					
16–17	6%	4%	5%	3%	3%
18–34	26% (▲b▲c▲d)	32%(▲a ▲e)	30%(▲a ▲e)	32%(▲a ▲e)	23%(▲b▲c▲d)
35–54	39%	37%	34%	36%	33%
55+	29%(▼e)	27%(▼c ▼e)	32%(▼b ▼e)	28%(▼e)	41% (▲a ▲b ▲,▲d)
MEAN	44.5(▼e)	42.8(▼e)	44.0(▼e)	43.1(▼e)	48.3(▲a ▲b ▲,▲d)
EMPLOYMENT STATUS*					
EMPLOYED	68%	69%	69%	68%	65%
STUDENT	9%	9%	9%	10%	11%
RETIRED	13%	11%	14%	13%	17%
OTHER	0%	11%	8%	10%	16%
INCOME					
<$35K	20%(▼b▼c▼d▼e)	28%	29%	27%	26%
$35K –$55K	16%	17%	16%	16%	14%
$55K –$75K	17% (▲c)	15%	13%	17%	16%
$75K –$100K	16% (▲e)	15%	16%(▲e)	13%	12%(▼a▼c▼)
$100K+	31%(▼b▼c▼)	26%	26%	27%	31% (▲b▲c▲d)
MEDIAN		%			$67,988
RACE/ETHNICITY*					
HISPANIC	4%	7%	6%	5%	6%
CAUCASIAN	80%	75%	77%	77%	76%
ASIAN	10%	13%	12%	11%	11%
BLACK	5%	6%	7%	7%	4%
OTHER	3%	4%	3%	4%	4%
VEHICLE ACCESS					
% W/ LICENSE	85%(▲c)	85%(▲c)	80%(▼a▼b▼d▼e)	86%(▲c)	83%(▲c)
% W/ VEHICLES	95% (▲b▲c▲d▲e)	90%(▼a▲c)	82%(▼a▼b▼d▼e)	89%(▼a▲c)	88%(▼a▲c)
MEAN # VEHICLES					1.73

Questionnaire

2014 Rider / Non-Rider Survey

INSTRUMENT CONVENTIONS:

DENOTES PROGRAMMING INSTRUCTIONS

- Text in ALLCAPS is not read to respondents

- Red Text in [ALLCAPS SURROUNDED BY BRACKETS] are programming instructions, not read to respondents (note that you should not display red text within the web program)

  - ME = Mutually Exclusive
  - NE = Not Equal to
  - GE = Greater than or Equal to
  - LT = Less than
  - LE = Less than or Equal to

- Text in (ALLCAPS SURROUNDED BY PARENTHESES BOLD TYPE) are interviewer instructions, not read to respondents

- Question marks (?) and 'X' or 'x' indicate information needed or to be determined in conjunction with the client

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SAMPLE / GROUPS

CREATE SAMPLETYPE: 01 RDD LANDLINE OR TARGETED LANDLINE; 03 RDD CELL PHONE
TO MINIMIZE SURVEY LENGTH: CREATE VARIABLE GROUP. RANDOMLY ASSIGN HALF OF THE PARTICIPANTS TO GROUP=1 AND HALF TO GROUP=2

SCREENING QUESTIONS; BASE: ALL RESPONDENTS

S1   To confirm, are you 16 years of age or older?

01	YES
02	NO
98	DON'T KNOW
99	REFUSED

IF S1 = 01 SKIP TO S2A
IF S1 = 02, AND SAMPLETYPE=01, CONTINUE TO S1A. IF SAMPLETYPE=03, THANK AND CONCLUDE - S1: NQ-UNDER 16 (THANK3 TEXT)
IF S1 = 98, 99 THANK AND CONCLUDE [S1: SCREENER REFUSAL (THANK5 TEXT)]

S1A   May I please speak with an individual in your household, 16 years of age or older?

01	NEW RESPONDENT AVAILABLE / WILLING TO PARTICIPATE **(REREAD INTRO FROM FLYSHEET)** **[GO BACK TO S1]**
02	NEW RESPONDENT NOT AVAILABLE **(FOLLOW-INSTRUCTIONS ON NEXT SCREEN)** **[GO TO "STOP SCREEN" (FROM BOTTOM OF QUESTIONNAIRE) AND COUNT AS A SCREENER INCOMPLETE] [SURVEY SHOULD RETURN TO S1]**

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01   NEW RESPONDENT UNWILLING TO PARTICIPATE **[THANK AND CONCLUDE - S1: NQ-UNDER 16 (THANK3 TEXT)]**

S2A   Are you a resident of King County?

        01   YES
        02   NO
        98   DON'T KNOW
        99   REFUSED

> **IF S2A = 01, CONTINUE**
> **IF S2A = 02, THANK AND CONCLUDE [S2A: NQ-NON-RESIDENT (THANK2 TEXT)]**
> **IF S2A = 98, 99 THANK AND CONCLUDE [SCREENER REFUSAL: S2A (THANK5 TEXT)]**

S2C   What is your home zip code?

       _____   ENTER CORRECT ZIP CODE **[RANGE 98001 – 98354]**
       99998   DON'T KNOW
       99999   REFUSED

> **IF S2C EQ 99998 OR 99999, THANK AND CONCLUDE [S2C: SCREENER REFUSAL (THANK5 TEXT)]**
> **IF ZIP CODE NOT IN SAMPLE LIST THANK AND CONCLUDE [OUT OF AREA (THANK2 TEXT)]**

S3   Including yourself, how many people live in your household who are 16 years of age or older?
     (ENTER RANGE BETWEEN 1 AND 8; IF MORE THAN 8 PEOPLE IN HOUSEHOLD ENTER 8)

       _____   ENTER NUMBER OF PERSONS 16+ IN HOUSEHOLD **[RANGE 1 – 8]**
       98   DON'T KNOW
       99   REFUSED

> **IF S3 > 01 AND < 98 CONTINUE**
> **IF S3 EQ 01 SKIP TO S5A**
> **IF S3 = 98, 99 THANK AND CONCLUDE [S3: SCREENER REFUSAL (THANK5 TEXT)]**

> **ASK S4B IF S3 > 1**

S4B   Including yourself, how many people in your household, 16 years of age or older, have taken **at least five (5)** one-way rides on a **Metro bus** or the **South Lake Union Street Car** in the last 30 days?(**AS NEEDED:** A round trip counts as two rides. A trip where you had to transfer counts as one ride.)

       _____   ENTER NUMBER OF **REGULAR** RIDERS IN HOUSEHOLD **[RANGE 0 TO RESPONSE S3]**
       98   DON'T KNOW
       99   REFUSED

> **ASK S4A IF S4B < S3**

S4A   Including yourself, how many people in your household, 16 years of age or older, have taken **between one (1) and four (4)** one-way rides on a **Metro Bus or the South Lake Union Street Car** in the last 30 days?

       ____   ENTER NUMBER OF **INFREQUENT** RIDERS IN HOUSEHOLD **[RANGE 0 TO RESPONSE S3-S4B]**

        98   DON'T KNOW
        99   REFUSED

ASK S5A IF S3 = 1 OR (S4A > 0 AND S4A < 98) OR (S4B > 0 AND S4B < 98))

S5A   Thinking about the last 30 days, how many **one-way rides** have **you** taken on a **Metro bus**?

        ___   ENTER TOTAL NUMBER OF METRO BUS RIDES **[RANGE: 0-90]**
        98   DON'T KNOW
        99   REFUSED

ASK S5B IF S5A = 98, 99

S5B   Would that be more than four (4) rides on a Metro bus?

        01   YES, 5 OR MORE RIDES
        02   NO, 1 TO 4 RIDES
        03   NO, 0 RIDES / NEVER RIDE
        98   DON'T KNOW
        99   REFUSED

ASK S6A IF S3 = 1 OR (S4A > 0 AND S4A < 98) OR (S4B > 0 AND S4B < 98))

S6A   Thinking about the last 30 days, how many **one-way rides** have **you** taken on **the South Lake Union Street Car**?

        _____   ENTER NUMBER OF STREETCAR RIDES **[RANGE: 0-90]**
        98   DON'T KNOW
        99   REFUSED

ASK Q6B IF S6A = 98, 99

S6B   Would that be more than four (4) rides on the South Lake Union Street Car?

        01   YES, 5 OR MORE RIDES
        02   NO, 1 TO 4 RIDES
        03   NO, 0 RIDES / NEVER RIDE
        98   DON'T KNOW
        99   REFUSED

IF S5A, S5B, S6A, AND S6B ALL EQ 98 OR 99, THANK AND CONCLUDE [RIDERMODE REFUSED (THANK5)]
ASK S6F IF (S4B = 0 AND S4A = 0) OR (S3 = 1 AND (S5A = 0 OR S5B = 03)) AND (S6A = 0 OR S6B = 03)

S6F   Did you or any other member of your household stop riding Metro because of the changes to or cuts in Metro service that were made on September 27, 2014?

        99   YES
        100   NO
        98   DON'T KNOW
        99   REFUSED

ASK S6C THROUGH S6E IF (S4B >=1 OR S4A >= 1) OR (S3 = 1 AND (S5A >=1 OR S5B = 01 OR 02) OR (S3 = 1 AND (S6A>=1 OR S6B = 01 OR 02)

S6C　　　　Were you or any other member of your household affected by the changes to or cuts in Metro service that were made on September 27, 2014?

99	YES
100	NO
98	DON'T KNOW
99	REFUSED

ASK S6D IF S6C = 01

S6D　　　　Was that you personally or a member of your household?**(SELECT ALL THAT APPLY)**

01	RESPONDENT PERSONALLY
02	OTHER HOUSEHOLD MEMBER
98	DON'T KNOW
99	REFUSED

ASK S6E IF S6D = 01

S6E　　　　How has your use of Metro changed as a result of this service change? **(SELECT ALL THAT APPLY)**

01	STOPPED RIDING
02	CHANGED ROUTES / RIDING DIFFERENT ROUTE
03	RIDING LESS FREQUENTLY
04	HASN'T CHANGED
95	OTHER **(SPECIFY)**
98	DON'T KNOW
99	REFUSED

COMPUTE NUMRIDES = S5A + S6A

CREATE VARIABLE = RIDESTAT
01　　REGULAR RIDER – (NUMRIDES>=5 OR S5B=1 OR S6B=1)
02　　INFREQUENT RIDER - (NUMRIDES=1-4 OR S5B=2 OR S6B=2)
03　　NON-RIDER – (((S4A=0) AND (S4B=0)) OR (NUMRIDES=0) OR (S5B=3 AND S6B=3))
04　　LOST RIDERS – (S6F=1) OR (S6E=1)
PROGRAMMER: IF CANNOT DETERMINE INDIVIDUAL RIDER STATUS, THANK AND CONCLUDE [RIDESTAT UNDETERMINED (THANK99 TEXT)]

CREATE VARIABLE = HHRIDESTAT
01　　REGULAR RIDER HOUSEHOLD: (RIDESTAT=01) OR (S4B>=1)

02 INFREQUENT RIDER HOUSEHOLD: IF ((RIDESTAT=02) AND (S4B=0)) OR [((RIDESTAT=3) OR (RIDESTAT=4)) AND ((S4B=0) AND (S4A >=1)] OR [(S3=1) AND (RIDESTAT=2)]

03 NONRIDER HOUSEHOLD: ((RIDESTAT=03) OR RIDESTAT=04)) AND ((S4B=0) AND (S4A=0))] OR [S3=1 AND ((RIDESTAT=03) OR (RIDESTAT=04))]

IF HHRIDESTAT = 03 AND RIDESTAT NE 04, THANK AND CONCLUDE

CREATE VARIABLE RIDERMODE FOR:

01 BUS ONLY [(S5A > 0 OR S5B <= 2) AND (S6A = 0 OR S6B = 3)]

02 STREETCAR ONLY [(S5A = 0 OR S5B = 3) AND (S6A > 0 OR S6B <= 2)]

03 BOTH BUS AND STREETCAR [(S5A> 0 OR S5B <= 2) AND (S6A > 0 OR S6B <= 2)]

IF RIDESTAT = 01 CONTINUE WITH CURRENT RESPONDENT (SKIP TO S7)

IF HHRIDESTAT = 01 AND RIDESTAT NE 01 ASK SEL2

SEL2　　To obtain a representative sample of all riders in the area, may I please speak with an individual in your household, 16 years of age or older, who has ridden Metro 5 or more times in the past 30 days?

　　　01　　REGULAR RIDER AVAILABLE / WILLING TO PARTICIPATE **(REREAD INTRO FROM FLYSHEET)**

　　　02　　REGULAR RIDER NOT AVAILABLE **(FOLLOW-INSTRUCTIONS ON NEXT SCREEN)** [REGULAR RIDER UNWILLING TO PARTICIPATE **(CONTINUE WITH RESPONDENT ON THE PHONE)** [SKIP TO S7 LOGIC]

　　　93　IF RESPONDENT SAYS I WAS THE RIDER BUT I DO NOT RIDE ANYMORE **(CONTINUE WITH RESPONDENT ON THE PHONE)** [SKIP TO S7 LOGIC AND TREAT AS LOST RIDER]

IF HHRIDESTAT = 02 AND RIDESTAT = 02 CONTINUE WITH CURRENT RESPONDENT

IF HHRIDESTAT = 02 AND RIDESTAT NE 02 ASK SEL3

SEL3　　To obtain a representative sample of all riders in the area, may I please speak with an individual in your household, 16 years of age or older, who has ridden Metro 1 to 4 times in the past 30 days?

　　　01　　INFREQUENT RIDER AVAILABLE / WILLING TO PARTICIPATE **(REREAD INTRO FROM FLYSHEET)**

　　　02　　INFREQUENT RIDER NOT AVAILABLE **(FOLLOW-INSTRUCTIONS ON NEXT SCREEN)** INFREQUENT RIDER UNWILLING TO PARTICIPATE **(CONTINUE WITH RESPONDENT ON THE PHONE)** [CONTINUE TO S7]

　　　101　　IF RESPONDENT SAYS I WAS THE RIDER BUT I DO NOT RIDE ANYMORE **(CONTINUE WITH RESPONDENT ON THE PHONE)** [SKIP TO S7 LOGIC AND TREAT AS LOST RIDER]

S7　　**[RIDESTAT=04 TEXT]** When you rode Metro, which bus routes did you take?

　　　[ALL OTHERS] What <u>Metro bus</u> routes do you take?　　(ENTER ALL THAT APPLY)

　　　____　ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
　　　____　ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
　　　____　ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
　　　____　ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
　　　(ROUTE HELP LIST)

1001	RAPID RIDE LINE A
1002	RAPID RIDE LINE B
1003	RAPID RIDE LINE C
1004	RAPID RIDE LINE D
1005	RAPID RIDE LINE E
1006	RAPID RIDE LINE F
1007	SEATTLE STREETCAR / SOUTH LAKE UNION STREETCAR / STREETCAR / ROUTE 98
1008	DART (600 TO 900 ROUTE NUMBERS)
2005	LINK LIGHT RAIL
2006	SOUNDER
2007	KING COUNTY WATER TAXI
9995	OTHER **(SPECIFY: ONLY ENTER UNLISTED NON-NUMERIC RESPONSE)**
9998	DON'T KNOW
9999	REFUSED

CONTNUE IF (S7 < 500) OR (S7 > 599) OR (S7 = 1001, 1002, 1003, 1004, 1005, 1006, 1007, 1008, 9995)
THANK AND TERM IF S7 ONLY EQUALS ROUTE NUMBER BEGINNING WITH 500 OR IF S7 ONLY EQUALS 2005, 2006, 2007
THANK AND TERM IF S7=9998/9999

ASK S7_1 IF MORE THAN ONE METRO ROUTE GIVEN IN S7

S7_1   Which Metro route do you ride for the trip you take most often?
(**AS NEEDED:** The one you use most often.)
RECORD AS OPEN-END RESPONSE

____   ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____   ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____   ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____   ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
(ROUTE HELP LIST)

1001	RAPID RIDE LINE A
1002	RAPID RIDE LINE B
1003	RAPID RIDE LINE C
1004	RAPID RIDE LINE D
1005	RAPID RIDE LINE E
1006	RAPID RIDE LINE F
1007	SEATTLE STREETCAR / SOUTH LAKE UNION STREETCAR / STREETCAR / ROUTE 98
1008	DART (600 TO 900 ROUTE NUMBERS)
2005	LINK LIGHT RAIL
2006	SOUNDER
2007	KING COUNTY WATER TAXI
9995	OTHER **(SPECIFY: ONLY ENTER UNLISTED NON-NUMERIC RESPONSE)**

9998   DON'T KNOW
9999   REFUSED

GENERAL RIDERSHIP; BASE: ALL RESPONDENTS

M1   **[IF RIDESTAT = 04 (LOST RIDER)]** How long had you been riding prior to the recent service cuts?
[ALL OTHERS] How long have you been riding **Metro**?
(READ LIST IF NECESSARY)

    01   LESS THAN 3 MONTHS
    02   3 TO 6 MONTHS
    03   6 MONTHS TO 9 MONTHS
    04   9 MONTHS TO 1 YEAR
    05   1 TO 2 YEARS
    06   3 TO 5 YEARS
    07   5 YEARS OR MORE
    98   **(NEVER READ)** DON'T KNOW
    99   **(NEVER READ)** REFUSED

IF M1=04, 05, 98, OR 99 ASK M1A

M1A   Did you start riding **Metro** after September of 2013?

    01   YES
    02   NO
    98   DON'T KNOW
    99   REFUSED

M5A   **[IF RIDESTAT = 04 (LOST RIDER)]** When you rode Metro, what was the **primary** purpose of the **trip you took most often**?
[ALL OTHERS] When you ride a Metro **[[**bus**]** or **[**streetcar**]]**, what is the **primary** purpose of the **trip you take most often**?
(READ IF RESPONDENT SAYS APPOINTMENTS: Would that be business appointments, medical appointments, or something else?)
(READ IF RESPONDENT SAYS TO GET/GO DOWNTOWN: What is the purpose of the trip you take to downtown? **OR** What do you do downtown?)

    01   TO/FROM WORK
    02   TO/FROM SCHOOL
    03   TO/FROM VOLUNTEERING
    04   SHOPPING / ERRANDS
    05   BUSINESS APPOINTMENTS
    06   MEDICAL APPOINTMENTS
    07   APPOINTMENTS OTHER **(SPECIFY)**
    08   FUN / RECREATION / SOCIAL
    09   SPECIAL EVENTS (SEAFAIR, BUMBERSHOOT SHUTTLES)
    10   JURY DUTY
    11   GO DOWNTOWN SEATTLE **(CLARIFY BEFORE USING THIS OPTION)**

12	GET TO AIRPORT
95	OTHER **(SPECIFY)**
96	USE FOR ALL TRIPS
97	NO SINGLE PRIMARY PURPOSE
98	DON'T KNOW
99	REFUSED

ASK M5B IF (RIDESTAT = 01 OR 02) AND (M5A<=95)

M5B   You indicated that you took **[RESTORE NUMRIDES]** one-way trips on Metro in the past 30 days. What percentage of these trips were for **[RESTORE RESPONSE TO M5A/IF M5A=7/95, RESTORE OS RESPONSE]**?

____	RECORD PERCENTAGE **[RANGE 1 TO 100%]**
998	DON'T KNOW
999	REFUSED

TRIP TAKEN MOST OFTEN; BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

SKIP TRIP_5A IF M5A >95

TRIP_5A   How many transfers do you **usually** make on the trip you take most often?
(ENTER 4 IF 4 OR MORE. USE DECIMALS AS NEEDED FOR FRACTIONAL RESPONSES.)

___	ENTER NUMBER OF TRANSFERS **[RANGE 0.00 – 4.00]**
08	VARIES DEPENDING ON THE BUS/STREETCAR
98	DON'T KNOW
99	REFUSED

SKIP TRIP_5B AND TRIP_5C IF TRIP_5A=0, 98, 99 (CONTINUE IF TRIP_5A IS >0 BUT <98)]

TRIP_5B   What route(s) do you transfer to?

[RECORD AS OPEN-END RESPONSE, MAKE IT SO THAT EACH RESPONSE IS IN A SEPARATE VARIABLE. ACCEPT NUMBER OF RESPONSES EQUAL TO NUMBER OF TRANSFERS THEY TAKE]

TRIP_5C   When you transfer, how long do you usually wait for the **[[bus]** or **[streetcar]]**?
(**AS NEEDED:** How long do you usually wait, in minutes)

(ENTER MINUTES ONLY. ENTER 60 IF 60 OR MORE)

___	RECORD MINUTES **[RANGE 0 TO 60]**
98	DON'T KNOW
99	REFUSED

ASK M5C IF M5B < 100%

M5C   You indicated that the primary purpose of the trip you take most often is for *[RESTORE RESPONSE TO M5A]*. What other trips do you take on Metro?
(**READ IF RESPONDENT SAYS APPOINTMENTS:** Would that be business appointments, medical appointments, or something else?)
(**READ IF RESPONDENT SAYS TO GET/GO DOWNTOWN:** What is the purpose of the trip you take to downtown? **OR** What do you do downtown?) (**ENTER ALL THAT APPLY**)

    01   TO/FROM WORK
    02   TO/FROM SCHOOL
    03   TO/FROM VOLUNTEERING
    04   SHOPPING / ERRANDS
    05   BUSINESS APPOINTMENTS
    06   MEDICAL APPOINTMENTS
    07   APPOINTMENTS OTHER **(SPECIFY)**
    08   FUN / RECREATION / SOCIAL
    09   SPECIAL EVENTS (SEAFAIR, BUMBERSHOOT SHUTTLES)
    10   JURY DUTY
    11   GO DOWNTOWN **(CLARIFY BEFORE USING THIS OPTION)**
    12   GET TO AIRPORT
    95   OTHER **(SPECIFY)**
    96   USE FOR ALL TRIPS/NO SINGLE PRIMARY PURPOSE
    98   DON'T KNOW
    99   REFUSED

M4   Now, thinking about all of your travel around King County, to what extent do you use the **[[**bus**]** or **[**streetcar**]]** to get around? Do you use the **[[**bus**]** or **[**streetcar**]]** for…

    04   All of your transportation needs
    03   Most of your transportation needs
    02   Some of your transportation needs
    01   Very little of your transportation needs
    98   DON'T KNOW
    99   REFUSED

PT1A   What method of transportation do you usually use to get around for <u>most</u> of your personal travel?
(**AS NEEDED**: By "personal travel" we mean non-work travel?) (**READ LIST ONLY IF NECESSARY; ENTER ALL THAT APPLY**)

    01   DRIVE ALONE
    02   CARPOOL
    03   VANPOOL
    04   RIDE A METRO BUS
    05   RIDE THE SOUTH LAKE UNION STREETCAR
    06   RIDE THE SOUNDER TRAIN
    07   RIDE LINK LIGHT RAIL
    08   RIDE A SOUND TRANSIT BUS
    09   SCHOOL BUS

10	RIDE ANOTHER SYSTEM'S BUS **(SPECIFY)**	
11	MOTORCYCLE	
12	BICYCLE	
13	WALK	
15	DRIVE TO PARK & RIDE LOT	
16	KING COUNTY WATER TAXI	
17	IT VARIES	
18	*TAXI / UBER / RIDESHARING*	
19	*SENIOR SERVICES / PARATRANSIT*	
95	OTHER **(SPECIFY)**	
98	**(NEVER READ)** DON'T KNOW	
99	**(NEVER READ)** REFUSED	

NEWM6 Do you usually ride the **[[**bus**]** or **[**streetcar**]]** during…

01	Peak hours only (**AS NEEDED:** 6:00 TO 9:00 IN THE MORNING AND 3:00 TO 6:00 IN THE AFTERNOON/EVENINGS)
02	Off-peak hours only
03	Both peak and off-peak hours
98	DON'T KNOW
99	REFUSED

PS1 In the past year, how often have you done each of the following? Would you say frequently, sometimes, rarely, or never?

PS1A Ride the **[[**bus**]** or **[**streetcar**]]** when it is dark

PS1B Get on or off a **[[**bus**]** or **[**streetcar**]]** in Downtown Seattle

PS1B_1 Get on or off a bus or Link Light Rail in the downtown transit tunnel

PR1 Used a Metro park-and-ride lot

04	FREQUENTLY/ALWAYS
03	SOMETIMES
02	RARELY
01	NEVER/NO
98	DON'T KNOW
99	REFUSED

ASK PR2B IF (PR1 >01) AND (PR1 <98)

PR2B How many times have you used Metro's park-and-ride lots in the last 30 days?

_____	ENTER NUMBER OF TIMES **[RANGE 0-60]**
98	DON'T KNOW
99	REFUSED

FARE PAYMENT; BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

F0.   Now I am going to ask you about how you pay your fare. How do you usually pay your bus fare? Do you use…? **(SELECT ALL THAT APPLY)**

01	An ORCA Card
02	Cash
03	Tickets
04	A U-Pass (or Husky Card)
05	A Regional Reduced Fare Permit, including a Senior Pass and Disability Card/Pass **(RRFP)**
06	ORCA CARD /PASS OR E-PURSE PROVIDED BY / PURCHASED FROM EMPLOYER
07	ACCESS PASS
08	SCHOOL DISTRICT CARD / PASS FROM SCHOOL **(PROBE WITH: Is this High School, a local college, or the University of Washington? IF UNIVERSITY OF WASHINGTON, CODE AS 04 – U-PASS/HUSKY CARD)**
94	KING COUNTY EMPLOYEE ID / BADGE
95	OTHER **(SPECIFY)** (PROBE: READ LIST AGAIN BEFORE ACCEPTING)
98	DON'T KNOW
99	REFUSED

F1   **[HIDDEN QUESTION: RECODE F0 RESPONSES BELOW]**

01	An ORCA Card **[F0=01, 07, 08]**
02	Cash **[F0=02]**
03	Tickets **[F0=03]**
04	A U-Pass (or Husky Card) **[F0=04]**
05	A Regional Reduced Fare Permit (Includes Senior Pass) **[F0=05]**
06	EMPLOYER PROVIDED ORCA CARD **[F0=06]**
94	KING COUNTY EMPLOYEE ID / BADGE **[F0=94]**
95	OTHER **(SPECIFY) [F0=95]**
98	DON'T KNOW **[F0=98]**
99	REFUSED **[F0=99]**

ASK F1A IF (F1 = 01)
IF (F1=04 OR F1=06 OR F1=94) AUTOCODE F1A AS 01 (ADULT CARD); IF (F0=08), AUTO CODE F1A=02 (YOUTH CARD), REGARDLESS OF ANY OTHER RESPONSES AT F0

F1A   Is your ORCA card an…? **(READ LIST; SELECT SINGLE RESPONSE)**

01	Adult fare card **(AS NEEDED:** Includes passport, flexpass, or a pass provided by employer)
02	Youth fare card **(AS NEEDED:** Includes school district card or pass and youth card)
03	Regional Reduced Fare Permit, including Senior and Disabled Fare Permit **(RRFP)**
04	U-Pass (or Husky Card)
95	SOMETHING ELSE **(SPECIFY)**
98	DON'T KNOW
99	REFUSED

ASK F1B IF F1 = 05 (RRFP) AND F1 NE 01 (NOT AN ORCA)

F1B   Is your Regional Reduced Fare Permit on an ORCA Card…

    01   YES
    02   NO
    98   DON'T KNOW
    99   REFUSED

ASK F1B_1 IF (F1A EQ 03) OR F1 EQ 05

F1B_1   Is your Regional Reduced Fare Permit a…

    01   Senior Permit or
    02   A Disabled Permit
    98   DON'T KNOW
    99   REFUSED

CREATE VARIABLE: FARE_PAYMENT AS SINGLE RESPONSE VARIABLE:
FARE_PAYMENT = 01 (CASH / TICKETS)
[IF F1 = 02 OR F1=03] AND (F1 NE 1)
FARE_PAYMENT = 03 (ADULT ORCA)
[IF (F1= 01) AND (F1A=01) AND (F1 NOT EQ 05)] OR [F1 = 06 OR F1 = 94]
FARE_PAYMENT =04 (YOUTH ORCA)
[IF F1 = 01 AND F1A EQ 02]
FARE_PAYMENT =05 (RRFP ORCA)
[(F1=01) AND (F1A=03)] OR [(F1=05) AND (F1B=01)] OR (F1 EQ 01 AND F1 EQ 05)
FARE_PAYMENT =06 (RRFP NOT ORCA)
(F1B EQ 02)
FARE_PAYMENT =07 (U-PASS)
[IF F1 = 04 OR F1A = 04]
FARE_PAYMENT =95 (OTHER)
[IF F1 = 95 AND NO OTHER OPTION IS SELECTED] OR [EVERYTHING ELSE]
IF F1 IS MULTIPLE CHOICE AND ONE SELECTION IS 95 (OTHER), IGNORE THE 95 WHEN CREATING THE FARE_PAYMENT VARIABLE]

CREATE VARIABLE: ORCA
1 "ORCA CARD" IF FARE_PAYMENT=03 OR 04 OR 05
2 "NOT ORCA CARD" IF FARE_PAYMENT=01 OR 06, OR 95
3 "U-PASS" IF FARE_PAYMENT=07

ASK F1D IF ORCA=01

F1D   Do you have a pass or an E-Purse on your ORCA Card?

(IF RESPONDENT SAYS DON'T KNOW: Do you load money onto your ORCA Card to pay your fare? **(IF YES, CODE AS E-PURSE))**

01	PASS
02	E-PURSE
03	BOTH
04	NO / NEITHER
05	EMPLOYER / SCHOOL PROVIDED SO I DO NOT KNOW
98	DON'T KNOW
99	REFUSED

ASK F2INT/F2A THROUGH F2B_1 IF (F1D=4 OR 98)

F2INT   To help us figure out what is loaded on your card I would like to provide a brief definition of an E-Purse and a Pass. ORCA cards can have an electronic - Purse, called an E-purse, which is like having money stored on a card that can be used to pay your transit fare. The value stored on an E-Purse must be periodically re-loaded by you or your employer.

F2A   Do you have an E-Purse on your ORCA card?

01	YES
02	NO
98	DON'T KNOW
98	REFUSED

F2B_1   ORCA cards can also have a pass that allows you to ride as much as you want during the time the pass is valid. The pass may be called a Regional or Puget Pass, Passport or U-PASS that either you, your employer or school pays for. Do you have a pass on your ORCA card?

01	YES
02	NO
98	DON'T KNOW
98	REFUSED

ASK F3A IF ((F1D=01) OR (F1D=02) OR (F1D=03)) OR (F2A=01) OR (F2B_1=01) OR (F1D=05)

F3A   Does your employer or school pay for part or all of your ORCA pass or E-purse?
(IF YES, READ: Would that be all or some of the cost?)
(AS NEEDED: Would that be your school or your employer?)

01	YES, ALL PAID FOR BY SCHOOL
02	YES, ALL PAID FOR BY EMPLOYER
03	YES, SOME PAID FOR BY SCHOOL
04	YES, SOME PAID FOR BY EMPLOYER
05	NO, NONE PAID FOR BY SCHOOL/EMPLOYER
97	NOT EMPLOYED AND DON'T ATTEND SCHOOL
98	DON'T KNOW
99	REFUSED

ASK FR4A IF FARE_PAYMENT = 01

F4A   You indicated that you use **[CASH / TICKETS"]** to pay your fare. Why do you prefer to use **[CASH / TICKETS]** as opposed to an ORCA Card?

(ENTER ALL THAT APPLY)
01   DON'T RIDE OFTEN ENOUGH
02   EASIER TO PAY WITH CASH/TICKETS
03   DON'T HAVE A DEBIT OR CREDIT CARD TO PUT A PASS ON OR ADD VALUE TO AN ORCA CARD
04   NOT ENOUGH LOCATIONS AVAILABLE WHERE I CAN GO TO PUT A PASS ON OR ADD VALUE TO AN ORCA CARD
05   CONCERNS ABOUT LOSING ORCA CARD
06   CONCERNS ABOUT SECURITY / IDENTITY THEFT USING AN ORCA CARD
07   CAN'T AFFORD THE $5 FEE TO PURCHASE AN ORCA CARD
08   DON'T WANT TO / UNWILLING TO PAY THE $5 FEE TO PURCHASE AN ORCA CARD
09   RECEIVE TICKETS FROM SOCIAL SERVICE AGENCY / SCHOOL / WORK
10   *HAVEN'T GOT AROUND TO IT / NO TIME / LOST CARD*
11   *DON'T KNOW ABOUT IT / HAVEN'T LOOKED INTO IT*
95   OTHER **(SPECIFY)**
98   DON'T KNOW
99   REFUSED

RIDERS' PERSONAL SAFETY; BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

PS3A   Do you avoid riding the bus or streetcar due to concerns about your personal safety? (**IF YES, READ:** Would that be frequently, sometimes, or rarely?)

04   FREQUENTLY
03   SOMETIMES
02   RARELY
01   NEVER / NO, I DO NOT AVOID RIDING
98   DON'T KNOW
99   REFUSED

PS5   As I read each of the following statements please tell me if you agree or disagree with each statement. **(FOLLOW-UP)** Would that be strongly or somewhat (agree/disagree)?

     05   STRONGLY AGREE
     04   SOMEWHAT AGREE
     02   SOMEWHAT DISAGREE
     01   STRONGLY DISAGREE
     03   NEITHER AGREE NOR DISAGREE / NO OPINION
     97   NOT APPLICABLE
     98   DON'T KNOW
     99   REFUSED

RANDOMIZE PS5A TO PS5G

PS5A   I feel significantly safer riding Metro now than I did a year ago

PS5B   Metro has been very proactive in improving safety and security

PS5G   Metro provides a safe and secure transportation environment

ASK PS5H AND PS5I IF PS1B = 02, 03, 04, RANDOMIZE PS5H TO PS5I

PS5H   It is safe to use public transportation in downtown Seattle during the daytime

PS5I   It is safe to use public transportation in downtown Seattle after dark

ASK PS7B IF (PS5H < 03)

PS6B   What specific intersection or location in downtown Seattle do you feel **most** unsafe waiting for the bus **during the day**?
     [OPEN-ENDED RESPONSE]

INFORMATION; BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

IN4A   Do you own a Smartphone?

     01   YES
     02   NO
     98   DON'T KNOW
     99   REFUSED

RANDOMIZE IN1A TO IN1K

IN1   How often do you use each of the following to get information regarding Metro? Would you say frequently, sometimes, rarely, or never?

     IN1A   Printed timetables

     IN1B   Metro Online

     IN1C   Information posted at stops, transit centers, and park-and-ride lots

     IN1D   Metro alerts via text messages

     IN1E   Metro alerts via e-mail

     IN1G   Metro's Online Regional Trip Planner

     IN1H   Tweets from Metro

     IN1I   Metro's Facebook

     IN1J   Metro Matters Blog

     IN1K   Metro's Customer Service Call Center

ASK IN1L IF IN4A = 01

     IN1L   A Smartphone

         04   FREQUENTLY/ALWAYS
         03   SOMETIMES
         02   RARELY
         01   NEVER/NO
         98   DON'T KNOW
         99   REFUSED

ASK IN4B_2 IF IN1L GE 03

IN4B_2   Which Smartphone apps or mobile software do you use to get information about Metro? **(READ LIST AND ENTER ALL THAT APPLY)**

         01   One Bus Away
         02   Transit App *(SEATTLE TRANSIT)*
         03   SeattleBus
         04   Seattle Metro
         05   Metro's mobile trip planner (m.tripplanner.kingcounty.metro)
         06   GOGGLE / GOOGLE MAPS / GOOGLE TRANSIT
         95   OTHER **(SPECIFY)**
         98   DON'T KNOW
         99   REFUSED

COMMUTER STATUS; BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

CS1   Are you currently…

         (READ LIST UNTIL VALID RESPONSE GIVEN; SELECT ALL THAT APPLY)
- 01   Employed/Self-employed
- 02   A student
- 03   A homemaker
- 04   Retired
- 05   Currently not employed
- 94   DISABLED
- 95   OTHER **(SPECIFY)**
- 98   DON'T KNOW
- 99   REFUSED

ASK CS1A IF CS1 = 01

CS1A   Are you employed…?

- 01   Full-time
- 02   Part-time
- 03   Self-employed
- 98   DON'T KNOW
- 99   REFUSED

ASK CS1B IF CS1 = 02

CS1B   Are you a…?

- 01   Full-time student
- 22   Part-time student
- 98   DON'T KNOW
- 99   REFUSED

ASK CS1C IF CS1 = 01 AND 02

CS1C   Which do you consider to be your primary activity?

- 01   Employed
- 02   A student
- 98   DON'T KNOW
- 99   REFUSED

ASK CS2B IF CS1 = 01

CS2B   How many days a week do you travel to work, that is, **you work outside your home?**

       _____   ENTER NUMBER OF DAYS **[RANGE: 0-7, 98, 99] [ALLOW DECIMALS]**

98	DON'T KNOW
99	REFUSED

ASK CS2C IF CS2B > 0 AND (RIDESTAT =01, 02)

CS2C   Of the [RESTORE ANSWER TO CS2B] days that you travel to work, how many days do you take a Metro bus or the South Lake Union Streetcar as part of that commute?

   _____   ENTER NUMBER OF DAYS **[RANGE: 0-RESPONSE TO CS2C, 98, 99] [ALLOW DECIMALS]**

98	DON'T KNOW
99	REFUSED

ASK CS3B IF CS1 = 02

CS3B   How many days a week do you travel to school, that is, **you attend class outside your home?**

   _____   ENTER NUMBER OF DAYS **[RANGE: 0-7, 98, 99] [ALLOW DECIMALS]**

98	DON'T KNOW
03	REFUSED

ASK CS3C IF CS3B > 0 AND (RIDESTAT =01, 02)

CS3C   Of the **[RESTORE ANSWER TO CS3B]** days that you travel to school, how many days do you take a Metro bus or the South Lake Union Streetcar as part of that commute?

   _____   ENTER NUMBER OF DAYS **[RANGE: 0- RESPONSE TO CS3B, 98, 99] [ALLOW DECIMALS]**

98	DON'T KNOW
01	REFUSED

CREATE VARIABLE = COMMUTER
01   WORK COMMUTER: CS2B >2 AND <98
02   SCHOOL COMMUTER: CS3B > 2 AND < 98
IF BOTH CS2B AND CS3B > 2 AND < 98
     01 WORK COMMUTER IF CS1C = 01
     02 SCHOOL COMMUTER IF CS1C = 02
03   NON-COMMUTER
     ALL ELSE SO LONG AS RIDESTAT=01 OR 02

CREATE VARIABLE = WORK_COMMUTERS
1 "Non-commuters" (CS2B=0) OR (CS1 NE 1) OR (CS2C<3)
2 "Commute, use Metro for all" (CS2B >=1) AND (CS2B=CS2C)
3 "Commute, use Metro for some" (CS2B >=1) AND (CS2B > CS2C) AND (CS2C >= 1)
4 "Commute, not use Metro" (CS2B >=1) AND (CS2C <1)

CREATE VARIABLE = SCHOOL_COMMUTERS

ASK C4A IF WORK_SCHOOL_COMMUTE=03 OR 07 OR 09 OR 10 OR 11 OR 12 OR 15

C4A   *[IF WORK_SCHOOL_COMMUTE=03 OR 07 OR 15 DISPLAY:* You indicated that you use Metro for *[RESTORE CS3C]* of the *[RESTORE CS3B]* days you *attend classes outside your home*. On those days when you don't use Metro, how do you get to school?

[IF WORK_SCHOOL_COMMUTE=09 OR 10 OR 12 DISPLAY: You indicated that you use Metro for *[RESTORE CS2C]* of the *[RESTORE CS2B]* days you work outside your home. On those days when you don't use Metro, how do you get to *work*?

[IF WORK_SCHOOL_COMMUTE=11 DISPLAY: You indicated that you use Metro for *[RESTORE CS2C+CS3C]* of the *[RESTORE CS2B+CS3B]* days you work and attend class outside your home. On those days when you don't use Metro, how do you get to work or school?

(READ LIST ONLY IF NECESSARY; ENTER ALL THAT APPLY)
01   DRIVE ALONE
02   CARPOOL (2 OR MORE PEOPLE IN CAR)
03   VANPOOL
06   RIDE THE SOUNDER TRAIN
07   RIDE LINK LIGHT RAIL
08   RIDE A SOUND TRANSIT BUS
09   SCHOOL BUS

10	RIDE ANOTHER SYSTEM'S BUS **(SPECIFY)**
11	MOTORCYCLE
12	BICYCLE
13	WALK
15	DRIVE TO PARK & RIDE LOT
16	KING COUNTY WATER TAXI
95	OTHER **(SPECIFY)**
98	**(NEVER READ)** DON'T KNOW
99	**(NEVER READ)** REFUSED

ASK C4B IF WORK_SCHOOL_COMMUTE=04 OR 08 OR 12 OR 13 OR 14 OR 15 OR 16

C4B   *IF WORK_SCHOOL_COMMUTE = 04 OR 08 OR 12 DISPLAY:* You indicated that you do not use Metro to get to school. How do you typically get to school?

IF WORK_SCHOOL_COMMUTE = 13 OR 14 OR 15 DISPLAY: You indicated that you do not use Metro to get to work. How do you typically get to work?

IF WORK_SCHOOL_COMMUTE = 16 DISPLAY: You indicated that you do not use Metro to get to work or school. How do you typically get to work or school?

(READ LIST ONLY IF NECESSARY; ENTER ALL THAT APPLY)

01	DRIVE ALONE
02	CARPOOL (2 OR MORE PEOPLE IN CAR)
03	VANPOOL
06	RIDE THE SOUNDER TRAIN
07	RIDE LINK LIGHT RAIL
08	RIDE A SOUND TRANSIT BUS
09	SCHOOL BUS
10	RIDE ANOTHER SYSTEM'S BUS **(SPECIFY)**
11	MOTORCYCLE
12	BICYCLE
13	WALK
15	DRIVE TO PARK & RIDE LOT
16	KING COUNTY WATER TAXI
95	OTHER **(SPECIFY)**
98	**(NEVER READ)** DON'T KNOW
99	**(NEVER READ)** REFUSED

ASK C4C IF C4B = 01

C4C Why do you drive alone instead of using Metro to commute to **[**work **/** school**]**?
ENTER ALL THAT APPLY

    01   NO SERVICE AVAILABLE TO WORK / SCHOOL LOCATION
    02   TRAVEL TIME TOO LONG
    03   WOULD NEED TO TRANSFER
    04   I GET FREE PARKING WHERE I WORK
    05   NEED CAR AT WORK / PICK UP KIDS / ERRANDS
    06   SAFETY CONCERNS / WORK AT NIGHT
    07   NO NEED / WALKING DISTANCE / CLOSE
    08   INCONVENIENT
    09   NOT PRACTICAL / WORK HOURS / WORK LOCATION
    10   COSTS TOO MUCH
    95   OTHER **(SPECIFY)**
    98   **(NEVER READ)** DON'T KNOW
    99   **(NEVER READ)** REFUSED

COMMUTER TRAVEL; BASE: COMMUTERS (IF COMMUTER=03, SKIP TO SATINT)

C1 In what geographic area do you *[work / attend school]*?

    01   Downtown Seattle Core **(AS NEEDED:** Downtown is the area between Denny Way on the north to Jackson Street on the South and between I-5 on the East to the waterfront on the west. Downtown does not include SODO, South Lake Union.**)**
    00   South Lake Union
    02   Other areas surrounding Downtown Seattle (**AS NEEDED:** This includes Pioneer Square, Belltown, International District, Capitol Hill, First Hill, Denny Regrade, and SODO)
    11   On the UW **(PRON: YOU-DUB)** campus
    03   University District
    05   Downtown Bellevue
    06   Redmond
    12   Renton
    13   SeaTac / Airport
    07   Other areas in East King County
    04   Other areas in North King County
    08   South King County
    09   Tacoma or other areas in Pierce County
    10   Everett or other areas in Snohomish **(PRON: sno-HOE-mish)** County
    95   Somewhere else? **(SPECIFY)**
    97   VARIES
    98   DON'T KNOW
    99   REFUSED

SATISFACTION; BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

RANDOMIZE ORDER OF QUESTION BLOCKS AND THEN RANDOMIZE ORDER WITHIN BLOCKS OF QUESTIONS

SATINT   I am going to ask you about your satisfaction with Metro service, this includes both bus and streetcar service.
Are you satisfied or dissatisfied with **(READ ATTRIBUTE)**? **(FOLLOW-UP)** Would that be very or somewhat (SATISFIED/DISSATISFIED)?

05	VERY SATISFIED
04	SOMEWHAT SATISFIED
02	SOMEWHAT DISSATISFIED
01	VERY DISSATISFIED
03	NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97	DOES NOT APPLY TO ME
98	DON'T KNOW
99	REFUSED

LEVEL OF SERVICE

RANDOMIZE M7B THROUGH M7E

M7B   Frequency of service

M7A   On-time performance

M7C   Availability of service where you need to travel

M7E   Amount of time it takes to travel

COMFORT / CLEANLINESS BUS INTERIOR

ASK M7G, M7H, M7I AND M7J IF GROUP=1

M7G   Inside cleanliness of **[[**buses**]** or **[**streetcars**]]**

M7H   Availability of seating on the **[[**bus**]** or **[**streetcar**]]**

M7I   Overcrowding on the **[[**bus**]** or **[**streetcar**]]**

M7J   Ease of getting on and off due to crowding on the **[[**bus**]** or **[**streetcar**]]**

COMFORT / CLEANLINESS BUS STOPS

ASK M7F, M7Q, M7R, M7T, MU AND M7W IF GROUP=1

M7F   Cleanliness of shelters and stops

M7Q   Availability of seating at shelters and stops

M7R	Amount of lighting at shelters and stops
M7T	Availability of shelters at [[bus] or [streetcar]] stops
MU	Distance from home to [[bus] or [streetcar]] stop
M7W	Ease of getting on and off the bus due to **crowding** at the [[bus] or [streetcar]] stops

DRIVERS

ASK M7L, M7M AND M7O IF GROUP=2

M7L	Driver helpfulness with route and stop information
M7M	Drivers operate the [[bus] or [streetcar]] in a safe and competent manner
M7O	Drivers effectively handle problems on the [[bus] or [streetcar]]

TRANSFERRING; [ASK IF TRIP_5A >=01]

SKIP M9 AND M11 IF TRIP_5A = 0

M9	Number of transfers required
M11	Wait time when transferring

FARE PAYMENT

F5A	Ease of paying fares when boarding

ASK F5B IF ORCA=01 (ORCA CARD)

F5B	Overall satisfaction with your ORCA card

ASK F5C IF (F1D = 01 OR O3) OR (F2B_1=01) AND ((F3A NE 1) OR (F3A NE 2))

F5C	Ease of loading a pass on your ORCA card

ASK F5D IF (F1D=02 OR 03) OR (F2A=01) AND ((F3A NE 1) OR (F3A NE 2))

F5D	Ease adding value to your E-Purse

ASK F5E IF (F1D= 01 OR 02 OR 03) OR (F2A=01) OR (F2B_1=01) AND ((F3A NE 1) OR (F3A NE 2))

F5E	Availability of locations to purchase a pass or add value to your E-Purse

PARK-AND-RIDE LOTS;[ASK PR3A, PR3B, PR3C, PR3E IF ((PR1>01) AND (PR1<98)) OR (PT1A=15) OR (C4A=15) OR (C4B=15)]

PR3A	The ability to get a parking space at park-and-ride lots
PR3B	Personal safety at the park-and-ride lot
PR3C	Security of your automobile at the park-and-ride lot

PR3E   Lighting at park-and-ride lots

INFORMATION

ASK IN3A, IN3C, IN3A IF GROUP=2. KEEP LOGIC FOR INDIVIDUAL QUESTION AS WELL.

IN3A   Overall ability to get information about Metro's routes and schedules

ASK IN3C IF IN1B=03 OR 04

IN3C   Availability of service information on Metro Online (**AS NEEDED:** Metro's website)

ASK IN3I IF IN1C=03 OR 04

IN3I   Availability of information at bus stops

PERSONAL SAFETY

PS2A   Personal safety on the **[[**bus**]** or **[**streetcar**]]** related to the conduct of others during the daytime

PS2C   Personal safety waiting for the **[[**bus**]** or **[**streetcar**]]** in the daytime

ASK PS2B AND PS2D IF PS1A > 01 AND < 98

PS2B   Personal safety on the **[[**bus**]** or **[**streetcar**]]** related to the conduct of others after dark

PS2D   Personal safety waiting for the **[[**bus**]** or **[**streetcar**]]** after dark

ASK PS2E IF PS1B > 01 AND < 98

PS2E   Personal safety in the downtown transit tunnel

ASK DTT1A TO DTT1B IF PS2E LT 04

DTT1A In which Downtown Transit Tunnel Station(s) do you feel most unsafe? **(ENTER ALL THAT APPLY)**

   26   INTERNATIONAL DISTRICT / CHINATOWN
   27   PIONEER SQUARE STATION
   28   UNIVERSITY STREET STATION
   29   WESTLAKE STATION
   30   CONVENTION CENTER STATION
   31   STADIUM / SODO STATION
   95   OTHER (SPECIFY)
   98   DON'T KNOW
   99   REFUSED

DTT1B Where in the tunnel do you feel most unsafe? **(READ LIST AND ENTER ALL THAT APPLY)**

   01   On the street near tunnel entrances
   02   On the mezzanines (PRON: Mez-uh-neens) (AS NEEDED: The level between the street and platforms)

03	On the platforms where you board the bus or train
04	In the elevators
95	OTHER AREAS (SPECIFY)
98	DON'T KNOW
99	REFUSED

OVERALL SATISFACTION, LOYALTY / ADVOCACY, GOODWILL *BASE: ALL RESPONDENTS*

GW1A   Overall, would you say you are satisfied or dissatisfied with Metro? **(FOLLOW-UP)** Would that be very or somewhat (SATISFIED/DISSATISFIED)?

05	VERY SATISFIED
04	SOMEWHAT SATISFIED
02	SOMEWHAT DISSATISFIED
01	VERY DISSATISFIED
03	NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97	DOES NOT APPLY TO ME
98	DON'T KNOW
99	REFUSED

ASK GW5 THOUGH GW5_8 IF GROUP=1; RANDOMIZE GW5_1 TO GW5_8

GW5   Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements.
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

GW5_1   When I hear my friends and colleagues talking about Metro, I generally hear positive things.

GW5_2   When I read or hear things about Metro in the media or online, I generally hear positive things.

GW5_7   Is an agency I like and respect

GW5_8   Is an agency I trust

ASK GW5_9 IF RIDESTAT EQ 01 OR 02

GW5_9   I like to be able to say I ride Metro

05	STRONGLY AGREE
04	SOMEWHAT AGREE
02	SOMEWHAT DISAGREE
01	STRONGLY DISAGREE
03	NEITHER AGREE NOR DISAGREE / NO OPINION
98	DON'T KNOW
99	REFUSED

ASK GW6 THOUGH GW6H IF GROUP=2; RANDOMIZE GW6 SERIES

GW6   Based on anything you have seen, heard, or directly experienced please tell me if you agree or disagree with each of the following statements.
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

GW6B   Metro offers good value for the level of service provided

GW6D   Metro provides excellent customer service

GW6E   Metro is innovative

GW6G   Metro has consistently high standards for the quality of service they provide

GW6H   Metro values its customers

05   STRONGLY AGREE
04   SOMEWHAT AGREE
02   SOMEWHAT DISAGREE
01   STRONGLY DISAGREE
03   NEITHER AGREE NOR DISAGREE / NO OPINION
98   DON'T KNOW
99   REFUSED

ALL RESPONDENTS

GW7   Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?

01   I have high expectations of Metro and I am confident that they will continue to provide the best service possible
02   I generally expect high quality service from Metro and I am generally confident that they will provide high quality service
03   I generally expect both good and bad service from Metro and am not fully confident that they will provide the quality of service I would like
04   I have low expectations of Metro and would expect to encounter problems when riding Metro
05   I have very low expectations of Metro and would not ride Metro unless I absolutely had to
98   DON'T KNOW
99   REFUSED

SPECIAL TOPICS; BASE: ALL RESPONDENTS

IN5A   If Metro stopped printing timetables in order to save money, how would you get information on routes and schedules?

(ENTER ALL THAT APPLY)
01   GO ONLINE AND PRINT THEM OUT
02   USE SCHEDULE INFORMATION AT STOPS
03   GET AN APP ON MY SMARTPHONE
04   *CALL METRO*
05   *STOP RIDING / RIDE LESS OFTEN*
95   OTHER **(SPECIFY)**
98   DON'T KNOW
99   REFUSED

IN5B   If Metro stopped printing timetables, would this make you feel. . .

         05   Significantly more positive towards Metro
         04   Somewhat more positive towards Metro
         02   Significantly more negative towards Metro
         01   Somewhat more negative towards Metro
         03   Or would it make no differences in how you feel about Metro
         95   OTHER **(SPECIFY)**
         98   DON'T KNOW
         99   REFUSED

ASK SCINT THROUGH SC1 IF RIDESTAT = 01 OR O2 AND S6C = 01

SCINT   To reduce operating costs and loss of some funding revenue due to expiration of the $20 car tab tax, in late September of this year Metro reduced service significantly by eliminating 28 routes and reducing or revising service on 13 others.

SC1   I am going to ask you about your satisfaction with how well Metro managed this service change. As I read each item please tell me if you are satisfied or dissatisfied with how Metro managed this service change. Would that be very or somewhat [satisfied / dissatisfied]?

     SC1_A   The extent to which Metro gets public input regarding these changes to service

     SC1_B   Providing you with the information you needed about these changes to service (e.g., how my route / travel is affected)

     SC1_C   Providing you with information about the reasons for these changes to service

     SC1_D   Knowing who to contact to provide your opinion about the service changes

     SC1_E   Timeliness of notifications about these services changes

         05   VERY SATISFIED
         04   SOMEWHAT SATISFIED
         02   SOMEWHAT DISSATISFIED
         01   VERY DISSATISFIED
         03   NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
         97   NOT APPLIABLE
         98   DON'T KNOW
         99   REFUSED

ASK SC2A THROUGH SC2D IF RIDESTAT = 04 (LOST RIDERS)

SC2A — Earlier, you indicated that you have stopped riding Metro as a result of the change to service. What route were you riding prior to the service change?

> ____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
> ____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
> ____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
> ____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
> **(ROUTE HELP LIST)**
> 1001 RAPID RIDE LINE A
> 1002 RAPID RIDE LINE B
> 1003 RAPID RIDE LINE C
> 1004 RAPID RIDE LINE D
> 1005 RAPID RIDE LINE E
> 1006 RAPID RIDE LINE F
> 1007 SEATTLE STREETCAR / SOUTH LAKE UNION STREETCAR / STREETCAR / ROUTE 98
> 1008 DART (600 TO 900 ROUTE NUMBERS)
> 2005 LINK LIGHT RAIL
> 2006 SOUNDER
> 2007 KING COUNTY WATER TAXI
> 9995 OTHER **(SPECIFY: ONLY ENTER UNLISTED NON-NUMERIC RESPONSE)**
> 9998 DON'T KNOW
> 9999 REFUSED

SC2B — You indicated that the primary purpose of the trip you took prior to the service change was to **[RESTORE RESPONSE TO M5A].** What mode of transportation are you now using to make this trip? **(ENTER ALL THAT APPLY)**

> 01 DRIVING ALONE
> 02 CARPOOL / DRIVING WITH SOMEONE ELSE
> 03 VANPOOL
> 04 WALK
> 05 BICYCLE
> 06 SOUND TRANSIT BUS
> 07 LINK LIGHT RAIL
> 08 SOUNDER TRAIN
> 95 OTHER **(SPECIFY)**
> 97 STOPPED MAKING THIS TRIP
> 98 DON'T KNOW
> 99 REFUSED

SC2C — Is there any other Metro bus you could have taken for this trip?

> 01 YES (SPECIFY WHICH ONE)
> 02 NO
> 98 DON'T KNOW
> 99 REFUSED

ASK SC2C_2 IF SC2C = 01

SC2C_2   Why don't you use this route? **[OPEN-ENDED RESPONSE]**

SC2D   If Metro were able to restore service on the route you used to use, how likely would you be to use Metro for this trip? Would you say. . .

05	Very likely
04	Somewhat likely
03	Neither likely nor unlikely
02	Not very likely
01	Not at all likely
98	DON'T KNOW
99	REFUSED

ASK SC3B IF S6E = 02 (CHANGED ROUTES)

SC3B   You indicated that you are riding a different route as a result of the change to service. What route were you riding prior to the service change?

ASK SC3D IF (S6C=01) OR (S6F=1)

SC3D   Have these service changes changed how you feel about Metro?

IF YES: Do you feel significantly more positive, somewhat more positive, somewhat more negative, or significantly more negative?

01	NO
02	YES: Significantly more positive towards Metro
03	YES: Somewhat more positive towards Metro
04	YES: Somewhat more negative towards Metro
05	YES: Significantly more negative towards Metro
98	DON'T KNOW
99	REFUSED

DEMOGRAPHICS; BASE: ALL RESPONDENTS

DEMO   Finally, I have some background questions that will be used to help us analyze the results of the study.

D2   May I please get your age?

__	AGE **[RANGE 1-97; NQ TERMINATE IF 1-15 ENTERED (THANK3)]**
98	DON'T KNOW
99	REFUSED

ASK D2A IF D2 98, 99

D2A   Would that be....

             (READ LIST UNTIL VALID RESPONSE GIVEN)
             01   16-17
             02   18-19
             03   20-24
             04   25-34
             05   35-44
             06   45-54
             07   55-64
             08   65 or Older
             98   DON'T KNOW
             99   REFUSED

D1   **ENTER GENDER OF RESPONDENT BY OBSERVATION. READ QUESTION TEXT ONLY IF NECESSARY)** Are you…
             01   MALE
             02   FEMALE

D3A   Do you have a valid driver's license?

             01   YES
             02   NO
             98   DON'T KNOW
             99   REFUSED

D3B   How many vehicles in working condition does your household have available? (**AS NEEDED**: Vehicles include cars, trucks, motorcycles, scooters, etc.)

             __   ENTER NUMBER OF VEHICLES [RANGE 0 – 8]
             98   DON'T KNOW
             99   REFUSED

ASK D3C IF S3 > 1 AND D3B > 0 AND D3A = 01

D3C   Is one of these vehicles available for **your personal use**?

             01   YES
             02   NO VEHICLES AVAILABLE FOR PERSONAL USE
             98   DON'T KNOW
             99   REFUSED

DIS1   Do you have a disability that limits your ability to do one or more major life activities?
(AS NEEDED: Such as walking or climbing stairs, running errands, hearing announcements, using a computer.)

        01   YES
        02   NO
        98   DON'T KNOW
        99   REFUSED

ASK DIS2 IF DIS1 = 1

DIS2   When you ride the bus, which of the following services do you use? **(READ LIST AND ACCEPT ALL THAT APPLY)**

        01   Priority seating area
        02   Use of the lift or ramp *OR KNEELING BUS*
        03   Wheelchair securement area
        04   Visual display of bus stops
        05   Audio announcement of bus stops and route numbers
        06   Travel training
        07   Free fare for personal care attendant
        08   Free fare for a service animal
        90   *NONE / NO ASSISTANCE NEEDED*
        97   Other types of assistance to use the bus **(SPECIFY)**
        10   DON'T KNOW
        11   REFUSED

D4A   Are you Spanish, Hispanic, or Latino? (**AS NEEDED**: Are you or were your ancestors Mexican, Puerto Rican, Cuban, Central or South American, or from Spain?)

        01   YES
        02   NO
        98   DON'T KNOW
        99   REFUSED

D4B   I am going to read a list of race categories. Please choose one or more races you consider yourself to be: **(READ LIST; SELECT ALL THAT APPLY)**

        01   White
        02   Black or African American
        03   American Indian or Alaskan Native
        04   Asian or Pacific Islander
        05   MULTI-RACE **(NO NEED TO SPECIFY)**
        94   HISPANIC
        95   OTHER **(SPECIFY)**
        98   DON'T KNOW
        99   REFUSED

D5   Is your total annual household income above or below $35,000 per year?

    01   BELOW $35,000 PER YEAR
    02   ABOVE $35,000 PER YEAR
    98   DON'T KNOW
    99   REFUSED

ASK D5A IF D5 EQ 01

D5A   Would that be…?

    01   Less than $7,500,
    02     $7,500 up to $15,000,
    03     $15,000 up to $25,000, or
    04     $25,000 up to $35,000?
    98   DON'T KNOW
    99   REFUSED

ASK D5B D5 EQ 02

D5B   Would that be…?
    01     $35,000 up to $55,000,
    02     $55,000 up to $75,000,
    03     $75,000 up to $100,000,
    04     $100,000 up to $150,000, or
    05     $150,000 and up?
    98   DON'T KNOW
    99   REFUSED

ASK TEL1 IF SAMPLETYPE = 01 (RDD BASE LANDLINE / LANDLINE SUPPLEMENT) OR IN1L = 01, 98, 99; SKIP TEL1 IF IN4A = 01

TEL1   In addition to your landline, do you have a working cell phone? (**AS NEEDED:** Do not include cell phones used only for business purposes.)

    01   YES, I HAVE A CELL PHONE
    02   NO, I DO NOT HAVE A CELL PHONE (LANDLINE ONLY)
    98   DON'T KNOW
    99   REFUSED

ASK TEL2 IF SAMPLETYPYE = 03 (RDD CELL PHONE

TEL2   In addition to your cell phone, is there at least one telephone line inside your home that is currently working and is **not** a cell phone?
(**AS NEEDED:** Do not include telephones only used for business or telephones only used for computers or fax machines.)

    01   YES
    02   NO
    98   DON'T KNOW
    99   REFUSED

ASK TEL3 IF TEL1 EQ 1 OR TEL2 EQ 1 OR IN4A=01

TEL3   Of all the telephone calls that you receive, are. . .

        01   All or almost all calls received on a cell phone
        02   Some received on a cell phone and some on a regular landline phone
        03   Very few or none received on a cell phone
        98   DON'T KNOW
        99   REFUSED

D8   Metro may be doing other studies in the future. May we contact you again if we do?
        (**AS NEEDED:** These could be surveys or focus groups. Your responses to this particular survey will never be connected with you personally.)

        01   YES - OKAY TO CONTACT
        02   NO - DON'T CONTACT / REFUSED **[SKIP TO THANK]**

THANK

THANK   That concludes our survey. Thank you very much for your time and the useful information you have provided us. **[COMPLETES]**

THANK2   Thank you for your time. We appreciate your cooperation in agreeing to complete this survey. Today we are only interviewing residents of King County. **[NQ-NON-RESIDENT]**

THANK3   Thank you for your time. We appreciate your cooperation in agreeing to complete this survey. However, we are only interviewing residents 16 years of age or older. **[NQ - UNDER 16]**

THANK4   Thank you for your time. We appreciate your cooperation in agreeing to complete this survey. However, we are only interviewing those who currently ride King County Metro. **[NQ – NONRIDERS / RIDER ONLY SAMPLE]**

THANK5   Thank you for your time, but we are unable to continue without that information. **[SCREENER REFUSALS]**

THANK99   Thank you very much for answering those questions. We appreciate your cooperation. **[ALL OTHER TERMINATIONS]**

Zip Code List

Seattle / North King	South King	East King
98101 98102 98103 98104 98105 98106	98001 98002 98003	98004 98005 98006 98007 98008 98009
98107 98108 98109	98010	98011
98111 98112 98113 98114 98115 98116 98117 98118 98119	98013	98014 98015
98121 98122	98022 98023	98019 98024
98124 98125 98126 98127	98025	98027 98028 98029
98129	98030 98031 98032 98035	98033 98034
98131 98132 98133 98134	98038	98039 98040 98041
98136	98042	98050
98139	98045	98052 98053
98141	98047 98051 98054 98055 98056 98057	98065
98144 98145	98058 98059	98072 98073
98151	98062 98063 98064	98074 98075
98154 98155	98070 98071	98077
98160 98161	98089	98083
98164 98165	98092 98093	98224
98170 98171	98138	98288
98174 98175	98146	
98177	98148	
98181	98158	
98184 98185	98166	
98189 98190 98191	98168	
98194 98195	98178	
98199	98188	
	98198	
	98354	

Includes residential zip codes. Zip codes designated as a PO are valid zip codes and should be included in the list of qualified zip codes for the questionnaire. They have 0 population so are not "sampled."