King County
METRO

King County Metro Transit

2016 Rider Survey Report

March 2017

Research conducted for:

King County
Department of Transportation
Metro Transit Division

By:

EMC Research, Inc.

Section Contents

King County METRO

Objectives, Methodology & Regional Sub-areas

Survey Objectives

- Measure riders' overall satisfaction with King County Metro Transit's services
- Measure riders' satisfaction with various elements of bus services (including time performance, safety, operator performance, fare payment, transfers, comfort and cleanliness, accessibility and communication)
- Provide marketshare and other data that will help measure performance
- Identify demographic and transit use characteristics among the identified groups

Methodology

- Long-term tracking study that measures rider satisfaction with various aspects of Metro's bus service to help King County Metro better understand where to focus its service improvement efforts to increase rider satisfaction over time.
- Live telephone survey of residents age 16 and older in King County, Washington.
- In keeping consistent with the study's approach in previous years, EMC conducted a telephone survey using a Random Digit Dial (RDD) and listed cell phone samples, supplemented with targeted <$35K income, Hispanic and Asian samples.
- Interviews conducted using trained, professional interviewers.

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

Methodology

- The survey was conducted December 1st – 30th, 2016
- 800 total respondents; Margin of Error: ± 3.5 percentage points
- Responses were weighted by key demographics to reflect the most recent census counts for residential households in King County.
- Data was weighted for each County sub-area using the Census estimates for all riders and non-riders in King County.
  - The rider data was tracked with the demographic info from previous studies to ensure the results to ensure age, gender, income, ethnicity, cell phone reliance and geographic consistently with previous years' riders, while accounting for potential shifts in rider demographics over time.

Methodology

- Interviews were stratified across three regional subgroups Seattle/North King (401n), South King (199n) and East King (200n) County.
- Regular Riders - defined as King County residents, 16 or older, who made 5 or more transit trips on a Metro bus or streetcar in the last 30 days.
- Infrequent Riders - defined as King County residents, 16 or older, who made 1 to 4 transit trips on a Metro bus or streetcar in the last 30 days.
- *Ridership – Previous years of the study included streetcar riders and former riders as part of the respondent base. The 2016 rider survey reflects the Metro bus riders only.
- Callback strategy included an initial contact attempt, plus up to 5 callbacks at varied times of day and evening as well as different weekday and weekend day types. The interviewing period was spread over several weeks to ensure the best chance of reaching the widest range of riders within each County sub-area.

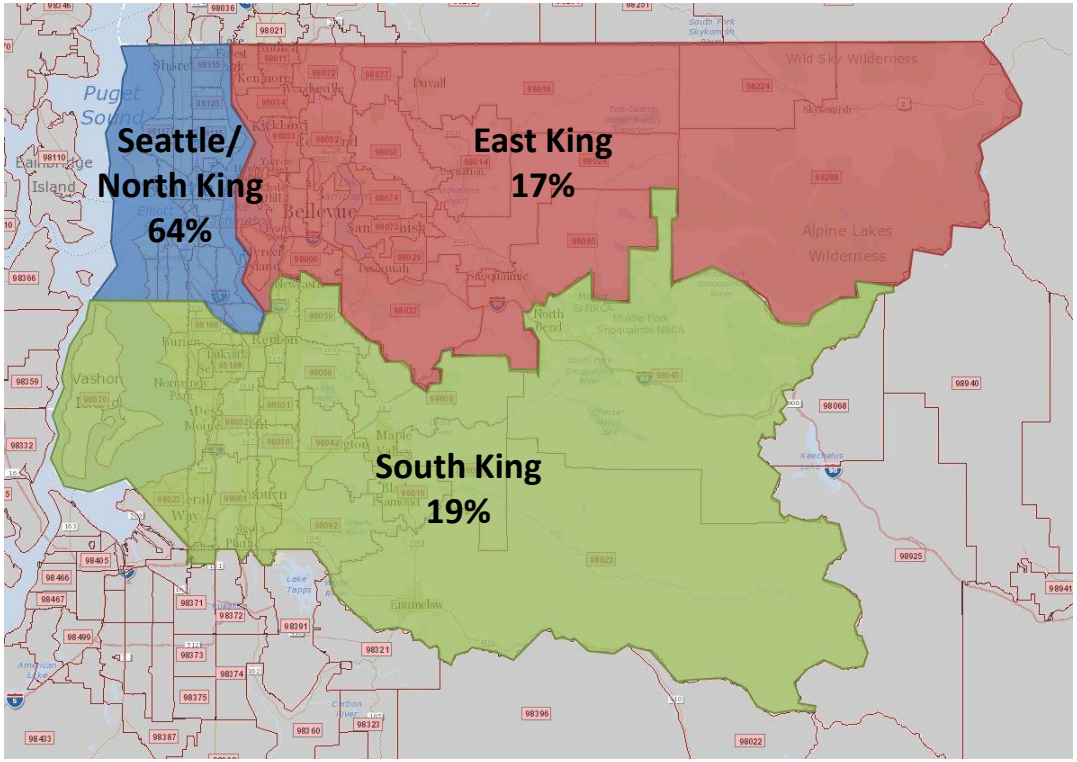
Methodology – Research Caveats

- The 2016 sample and weighting plans were designed to approximate the previous approaches as closely as possible with the information available from 2015 and earlier.
- A majority of the sample consisted of random digit dial (RDD) and listed cell phones, which are increasingly difficult to dial on due to declining geographic accuracy of cell phone numbers, rising costs due to increasingly strict regulations on cell phone dialing, and steadily declining RDD incidence making it increasingly difficult to reach representative samples of residents.
- Only bus riders were sampled in the 2016 survey. Previous years' surveys included the opinions of streetcar, which were excluded from this year's iteration of the survey.
- The Link extensions to U-District, Capitol Hill and Angle Lake opened in March 2016 with possible impacts on the composition of Metro ridership in those areas.

Regional Sub-areas

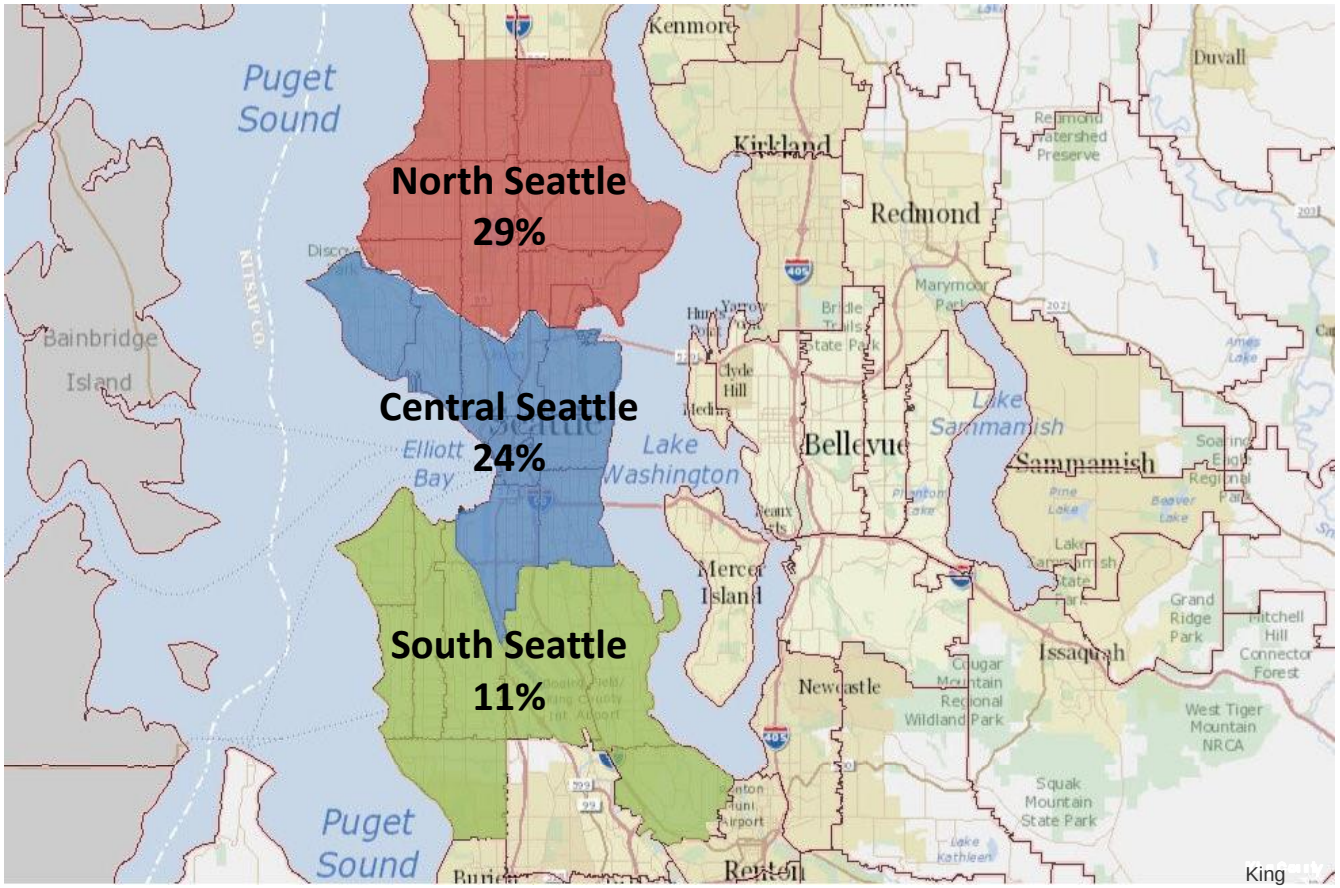
	King Countywide	Seattle/ North King	South King	East King
Total Rider n (Unweighted)	800	401	199	200
Margin of Error (+/-)	*+/-3.5%*	*+/-4.9%*	*+/-6.9%*	*+/-6.9%*
Total Riders (Weighted)	800	511	151	138
Regular Riders (Unweighted)	625	319	156	150
Infrequent Riders (Unweighted)	175	82	43	50

Weighted Sub-area %



Seattle Sub-areas

	King Countywide	North Seattle	Central Seattle	South Seattle
Total Rider n (Unweighted)	800	175	142	84
Margin of Error (+/-)	*+/-3.5%*	*+/-7.4%*	*+/-8.2%*	*+/-10.7%*
Total Riders (Weighted)	800	230	188	92



King County METRO

Key Findings

Key Findings

OVERALL SATISFACTION WITH METRO

- Riders' satisfaction with King County Metro continues to edge upward from previous years.
  - Nearly half (49%) of riders are "very satisfied" with the agency and another two-fifths (44%) are "somewhat satisfied" with very little dissatisfaction, overall.
  - Riders continue to be highly favorable of most aspects relating to fare payment and bus operator satisfaction.
  - Satisfaction with information-related element is lower than in previous years.
  - Level of Service satisfaction (including on-time performance, travel time, service frequency and availability), while also lower than 2015, has returned to 2014 levels.
  - All service elements have net favorability ratings, meaning far more riders were satisfied with those elements than dissatisfied.

INDIVIDUAL ELEMENT SATISFACTION CHANGES

- While satisfaction intensity has dropped for several individual elements compared to 2015, the broader satisfaction levels for most items (including "very" and "somewhat satisfied") was statistically unchanged for a majority of attributes.
  - Some individual satisfaction attributes saw declines in satisfaction from 2015 to 2016, including website service delay postings (-16% "satisfied"), the availability of information on Metro's website (-10%), info via smartphones (-10%), and ease of boarding/exiting due to overcrowding (-9%). Additionally, service element ratings for the availability of service (-7%), frequency of service (-6%), and on-time performance (-5%) also declined between 2015 and 2016.

Key Findings

AGGREGATED SERVICE DIMENSIONS

- 34 individual service elements were rated in the 2016 Rider survey. These individual elements were categorized into broader service dimensions, including **Comfort and Cleanliness**, **Fare Payment**, **Information**, **Level of Service**, **Operators**, **Personal Safety** and **Transfers**.
  - Of these dimensions, **Level of Service**, **Information Sources**, and **Transfers** are general priorities for improvement. These service dimensions are relatively lower rated but are also important drivers of overall satisfaction with Metro. Short-term efforts should prioritize improving these general areas but there are several specific elements in other categories that also deserve attention.
  - As another key area of focus, **Personal Safety** is an important maintenance priority. Safety element ratings are generally highly rated but Metro should continue to focus efforts on maintaining satisfaction with these attributes to prevent them from driving down agency satisfaction in the future.
  - The **Comfort and Cleanliness** dimension has the lowest bearing on overall satisfaction of the broader service dimensions but it's also the lowest performing. Some of the elements in this service dimension can be considered improvement priorities, including the ease of getting on/off crowded vehicles and the availability of seating at stops. On-board cleanliness is a key maintenance target, as well.
  - Metro **Operators** and **Fare Payment** are currently the agency's highest rated service dimensions but are largely performing adequately for their relative importance levels. It will be worth tracking satisfaction for these attributes in the future but major improvement efforts are not required for these elements in the near-term.

Key Findings

INDIVIDUAL SERVICE ELEMENTS

- There are several individual service elements which should be targeted for improvement as they heavily influence overall satisfaction with Metro but are currently underperforming relative to their importance. These elements span a variety of different service dimensions and include:
  - **Ability to provide feedback** (the Information service dimension)
  - **Frequency of service** (Level of Service)
  - **Transfer wait times** (Transferring)
  - **Number of transfers** (Transferring)
  - **Ease of getting on/off crowded buses** (Comfort & Cleanliness)
  - **On-time performance** (Level of Service)
  - **Safety of stops after dark** (Personal Safety)
  - **Availability of seating at stops** (Comfort & Cleanliness)

- Additional maintenance and strategic target items could be considered borderline improvement priorities, including **travel time** (Level of Service), **availability of service** (Level of Service), **interior cleanliness** (Comfort & Cleanliness) and **the availability of information online** (Information).

Key Findings

INDIVIDUAL SERVICE ELEMENTS

- Among the information-related elements, the **ability for riders to provide feedback such as registering a complaint, commendation, or input for service changes** is one of riders' biggest priorities for improvement. This is both the most important and lowest-rated element among the information-related items. It also poses potential spill-over opportunities for improving a variety of other service attributes as a more accessible feedback system could help Metro more easily identify other potential issues throughout the system and address them as they arise.

- **On-time performance** is a key improvement target and one of the most important level of service elements. Reducing delays and improved schedule consistency may offer one of the highest rate of return (in overall agency satisfaction) for the resources required relative to other Level of Service items.

- **Frequency of service** is one of the top improvement priorities in the survey and could yield some of the highest returns for overall satisfaction if Metro is able devote additional resources towards improving it. Given this element's reliance on additional funding, it may be less practical than other potential improvement opportunities to address in the short term. Nevertheless, the service frequency element remains a key priority for riders going forward.

- Of the personal safety elements**, night-time stop safety** is the key improvement area for Metro to focus on in the near-term. Stops and stations in South King may require particular attention, where one-in-ten riders in this geographic sub-area are "very dissatisfied" with their safety waiting for buses.

Key Findings

INDIVIDUAL SERVICE ELEMENTS

- Although the **availability of information online**, the **availability of info at stops** and **online delay postings** are not strictly improvement priorities, they are relatively low-rated and could easily be considered borderline areas to focus on in the near-term.
- Both of the transfer satisfaction elements tested – including the **number of transfers** and the **wait time while transferring** -- were relatively low-rated but also very important, making these key improvement priorities. While these likely pose ongoing scheduling challenges in light of regular service changes for Metro, Sound Transit and other regionally-connected services, riders consider transfers very important aspects of their overall satisfaction with Metro.
- The **ease of getting on and off crowded vehicles** and – to a lesser extent – the **availability of seating at stops and shelters** are potentially high-focus areas for improvement. Additionally, improving the **interior cleanliness of buses** could also be considered a borderline improvement area, particularly for riders in South King where satisfaction is a bit lower for this element.
- Of the comfort and cleanliness elements, **interior cleanliness** may be the easiest to address without significant funding or structural changes to the system. Riders consider it the most important comfort and cleanliness element but its satisfaction levels still have plenty of room for growth.

Key Findings

MARKETSHARE

- The portion of King County households with regular bus riders (ride 5+ times/month) has dropped over the last couple of years (35% regular riders in 2014→26% in 2016) and is on-par with 2011 levels (26%).
  - This decline is primarily driven by a lower incidence of regular bus riders in Seattle/North (54% in 2015→41% in 2016).
  - The household shares of regular bus riders in South King and East King are both unchanged from 2015, though both are lower than in 2013-2014.

FARE PAYMENT

- About three quarters of riders say they use an ORCA card (purchased themselves or by employers) as their primary method of bus fare payment.
  - When including U-Pass/Husky Card usage, nearly four-in-five riders (79%) use some type of ORCA card.
  - One fifth (21%) use cash or tickets as a primary fare payment method.

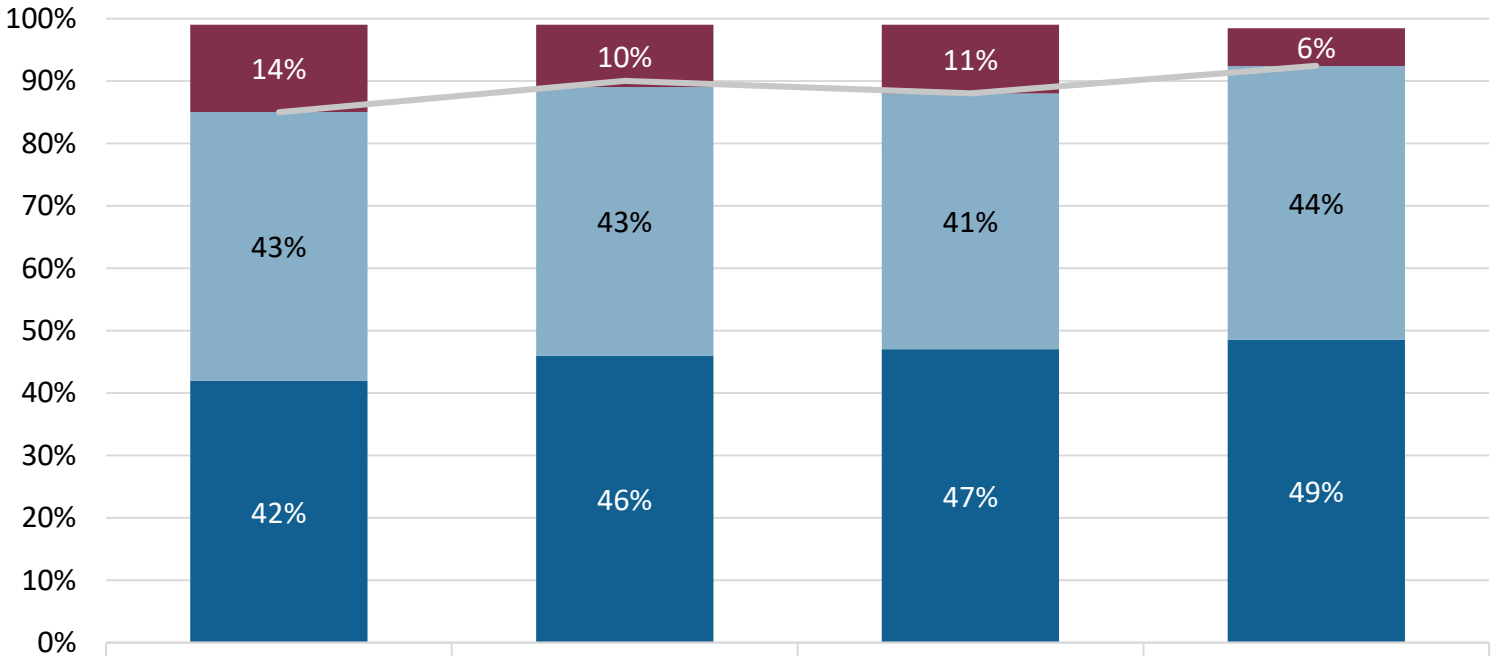
King County METRO

Overall Satisfaction with King County Metro

Overall Satisfaction with Metro – Year-to-Year

There continues to be steady growth in overall rider satisfaction ratings since 2013, as a near-majority of riders are "very satisfied" with the agency. Overall satisfaction (92%) is slightly higher than in previous years and there is notably little dissatisfaction with Metro's bus service, overall.

Overall Satisfaction with Metro



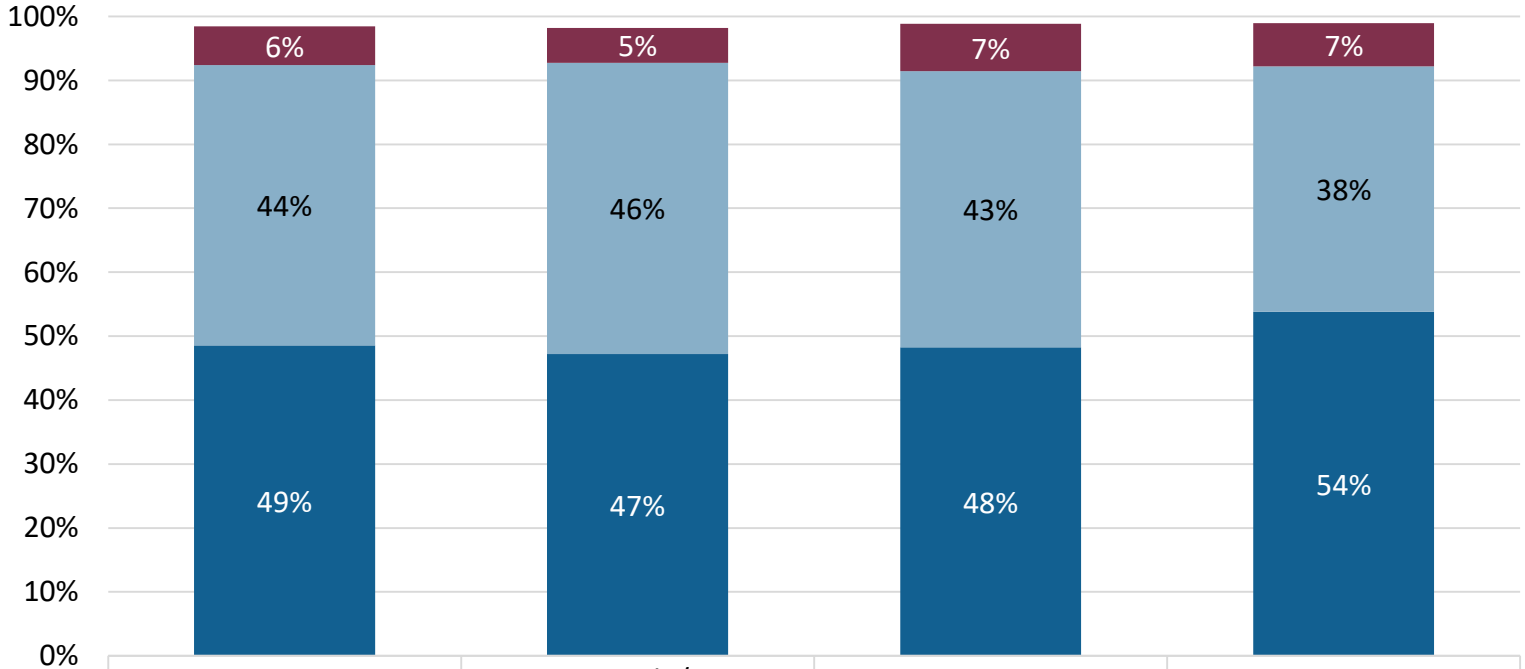
	2013	2014	2015	2016
Dissatisfied	14%	10%	11%	6%
Somewhat Satisfied	43%	43%	41%	44%
Very Satisfied	42%	46%	47%	49% ▲
Total Satisfied	85%	90%	88%	92%

GW1A. Overall, would you say you are satisfied or dissatisfied with Metro?

Overall Satisfaction by Sub-area

Overall rider satisfaction is comparably high in all King County sub-areas, particularly in East King where a majority (54%) of riders are "very satisfied" with Metro. Dissatisfaction remains low in all three areas.

Overall Satisfaction with Metro by Region



	Overall	Seattle/ North King (n=401 MoE=4.9%)	South King (n=199 MoE=6.9%)	East King (n=200 MoE=6.9%)
Dissatisfied	6%	5%	7%	7%
Somewhat Satisfied	44%	46%	43%	38%
Very Satisfied	49%	47%	48%	54%

GW1A. Overall, would you say you are satisfied or dissatisfied with Metro?

Overall Satisfaction by Subgroup

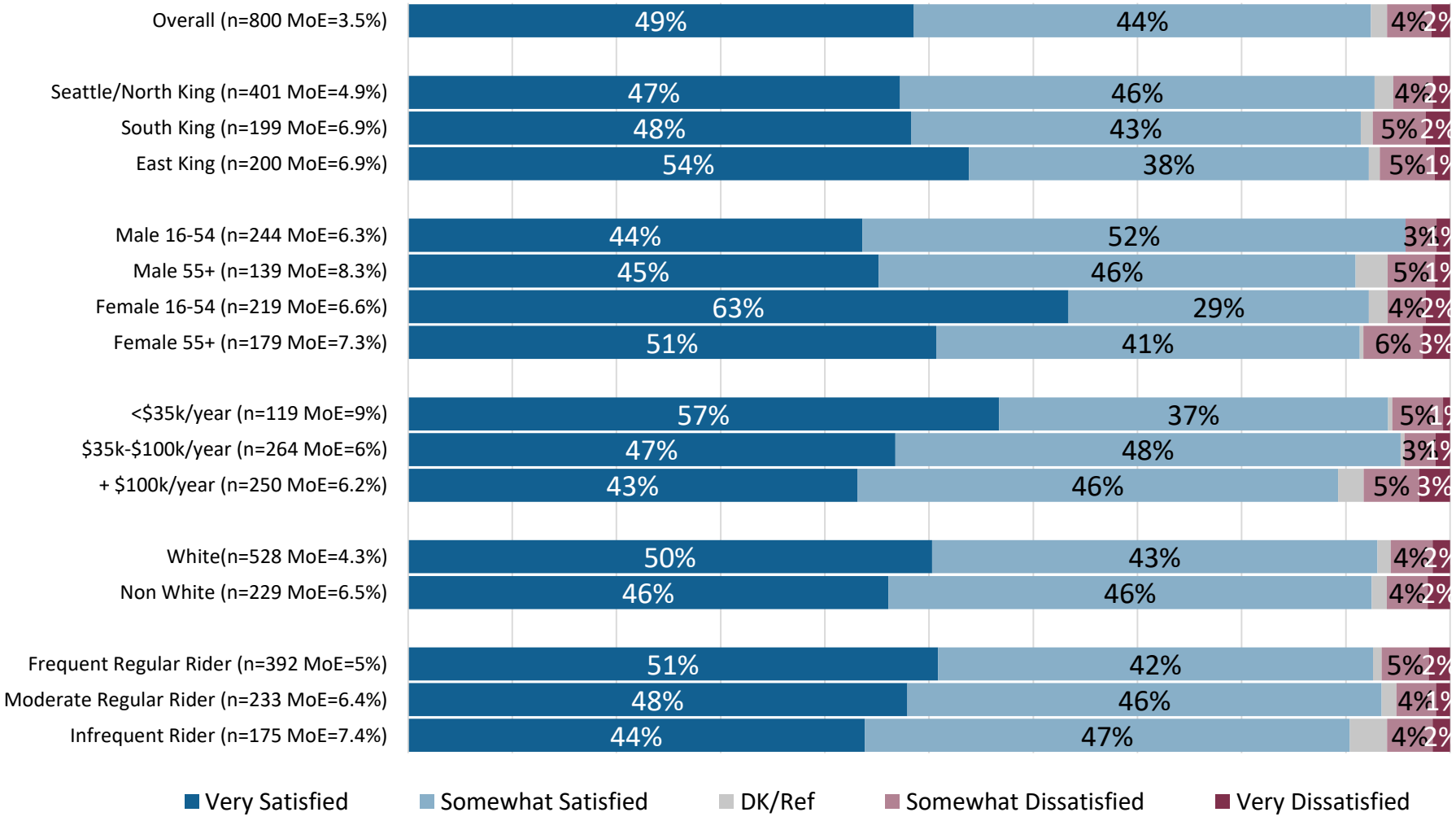
Riders' overall satisfaction with Metro is consistent across all major rider groups, as at least 9-in-10 are either very satisfied or somewhat satisfied with the agency. Younger (16-54) men are slightly more favorable of Metro than other rider demographic groups, while higher-income ($100K+/year) riders are slightly less satisfied.

Total Satisfied %	2016		Total Satisfied %	2016
Overall (100%)	92%		**Gender and Age**	
			16-34 (28%; 197n)	94%
			35-54 (34%; 266n)	93%
Riders			55+ (38%; 318n)	92%
Frequent Regular Rider (50%; 392n)	93%			
Moderate Regular Rider (30%; 233n)	93%		Male <55 (32%; 244n)	96%
Infrequent Rider (21%; 175n)	90%		Male 55+ (16%; 139n)	92%
			Female <55 (30%; 219n)	91%
			Female 55+ (22%; 179n)	91%
Ethnicity				
White (69%; 528n)	93%		**Income**	
Non-white (31% 229n)	92%		<$35K/year (25%; 119n)	94%
Asian/Pacific Islander (17%; 135n)	92%		$35K-$100K/year (34%; 264n)	95%
			>$100K/year (32%; 250n)	89%

GW1A. Overall, would you say you are satisfied or dissatisfied with Metro?

Overall Satisfaction by Subgroup

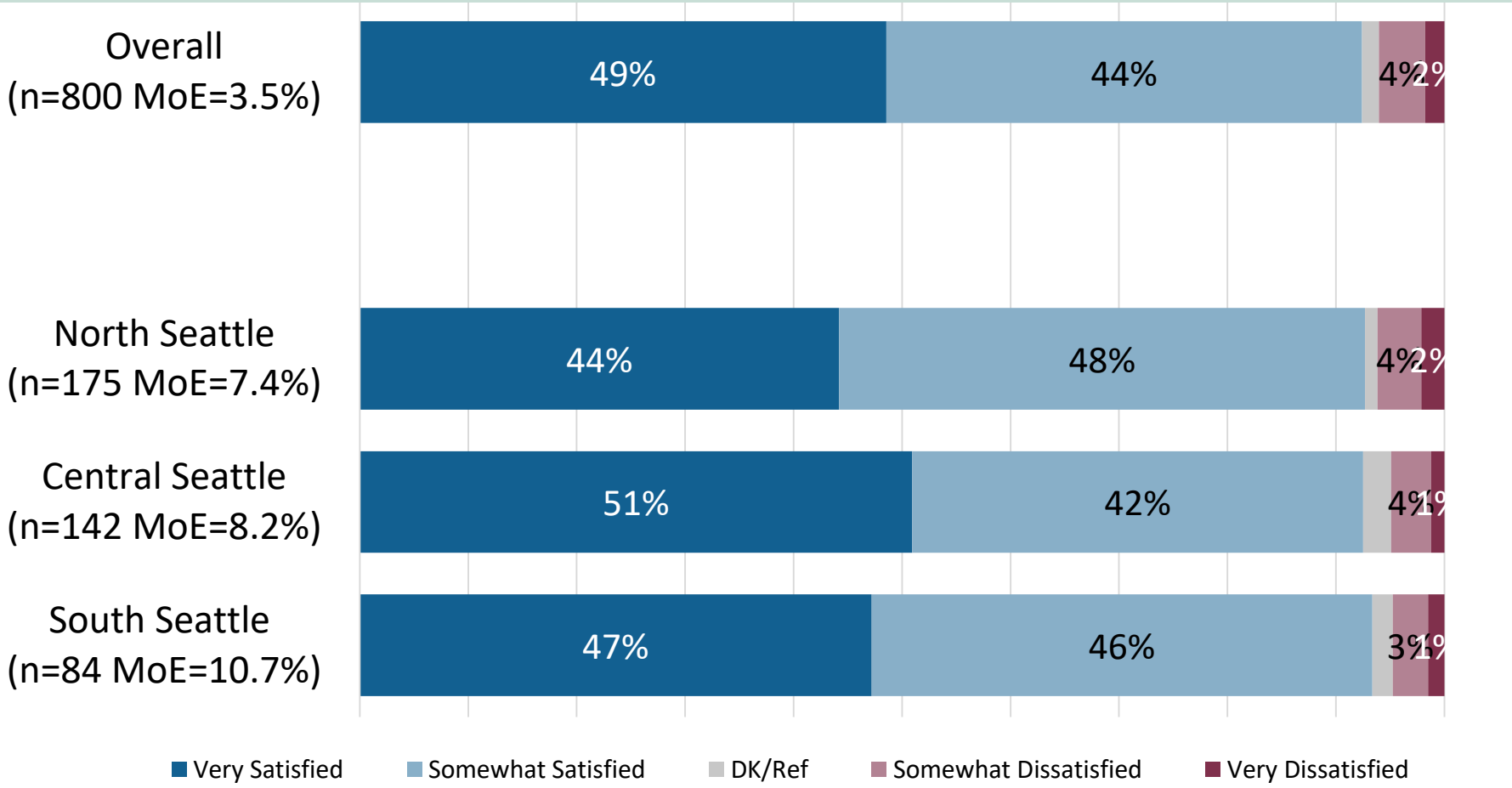
While broader satisfaction is comparably high across all major rider subgroups, positive intensity ratings ("very satisfied") are highest among women 16-54, riders from <35K/year households, and riders in East King. Satisfaction intensity is slightly lower among high-income ($100K+/year) riders, infrequent riders and male riders than other rider groups.



GW1A. Satisfaction Rating: Overall satisfaction with KC Metro

Overall Satisfaction by Seattle/North Geography

Comparing more granular sub-regions within Seattle/North, satisfaction intensity is slightly higher in Central Seattle and slightly lower in the North region of the city. There is minimal dissatisfaction among riders in all three areas.



GW1A. Satisfaction Rating: Overall satisfaction with KC Metro

King County METRO

Individual Element Satisfaction

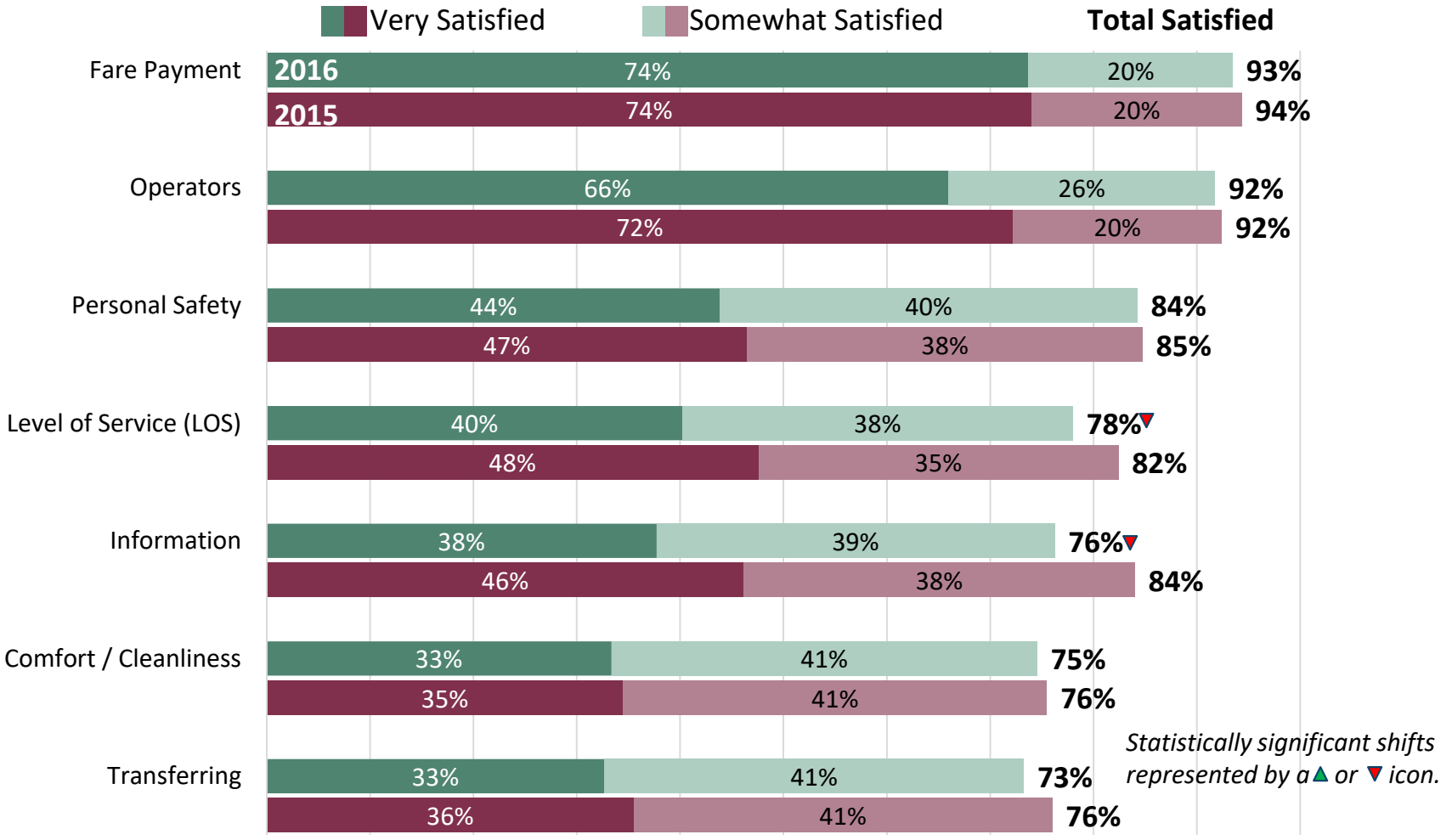
Individual Rider Satisfaction Elements

QST #	Service Satisfaction Element	Service Dimension	Very Satisfied %
M7B.	Frequency of service	Level of Service	36%
M7B_5.	Frequency of nighttime service after 10:00 p.m.*	Level of Service	7%
M7A.	On-time performance	Level of Service	33%
M7C.	Availability of service where you need to travel	Level of Service	38%
M7E.	Amount of time it takes to travel	Level of Service	34%
MU.	Distance from home to the bus stop	Level of Service	59%
M7G.	Inside cleanliness of buses	Comfort & Cleanliness	42%
M7I	Overcrowding on the bus	Comfort & Cleanliness	22%
M7J.	Ease of getting on and off due to crowding on the bus	Comfort & Cleanliness	39%
M7Q.	Availability of seating at shelters and stops	Comfort & Cleanliness	30%
M7L.	Driver helpfulness with route and stop information	Operators	64%
M7M.	Drivers operating the bus in a safe and competent manner	Operators	76%
M7O.	Drivers effectively handling problems on the bus	Operators	58%
M7K.	Driver courtesy	Operators	74%
M700.	Drivers starting and stopping the bus smoothly	Operators	58%
M9.	The number of transfers you have to take	Transferring	41%
M11.	The wait time when transferring	Transferring	25%
F5A.	The ease of paying fares when boarding	Fare Payment	79%
F5G.	The value of service for fare paid	Fare Payment	60%
F5B.	Your ORCA card overall	Fare Payment	81%
F5B2.	Your U-PASS overall*	Fare Payment	71%
PS2A.	Personal safety on the bus related to the conduct of others during the daytime	Personal Safety	50%
PS2C.	Personal safety waiting for the bus in the daytime	Personal Safety	64%
PS2B.	Personal safety on the bus related to the conduct of others after dark	Personal Safety	34%
PS2D.	Personal safety waiting for the bus after dark	Personal Safety	28%
PS2E.	Personal Safety in the downtown transit tunnel	Personal Safety	52%
IN3C.	Availability of service information on Metro Online/Metro's website	Information	46%
IN3I.	Availability of information at bus stops	Information	30%
IN3F.	Website posting of service delays or other problems	Information	33%
IN3L.	Ability to provide feedback such as registering a complaint or commendation	Information	31%
IN3K.	Notification of service changes	Information	34%
IN3A.	Overall ability to get information about Metro's routes and schedules	Information	52%
GW1A.	Overall satisfaction with King County Metro	Overall	49%

** NOTE: Elements that were asked of relatively few respondents were excluded from the average ratings for their respective aggregate service dimension.*

Aggregate Service Dimension Satisfaction

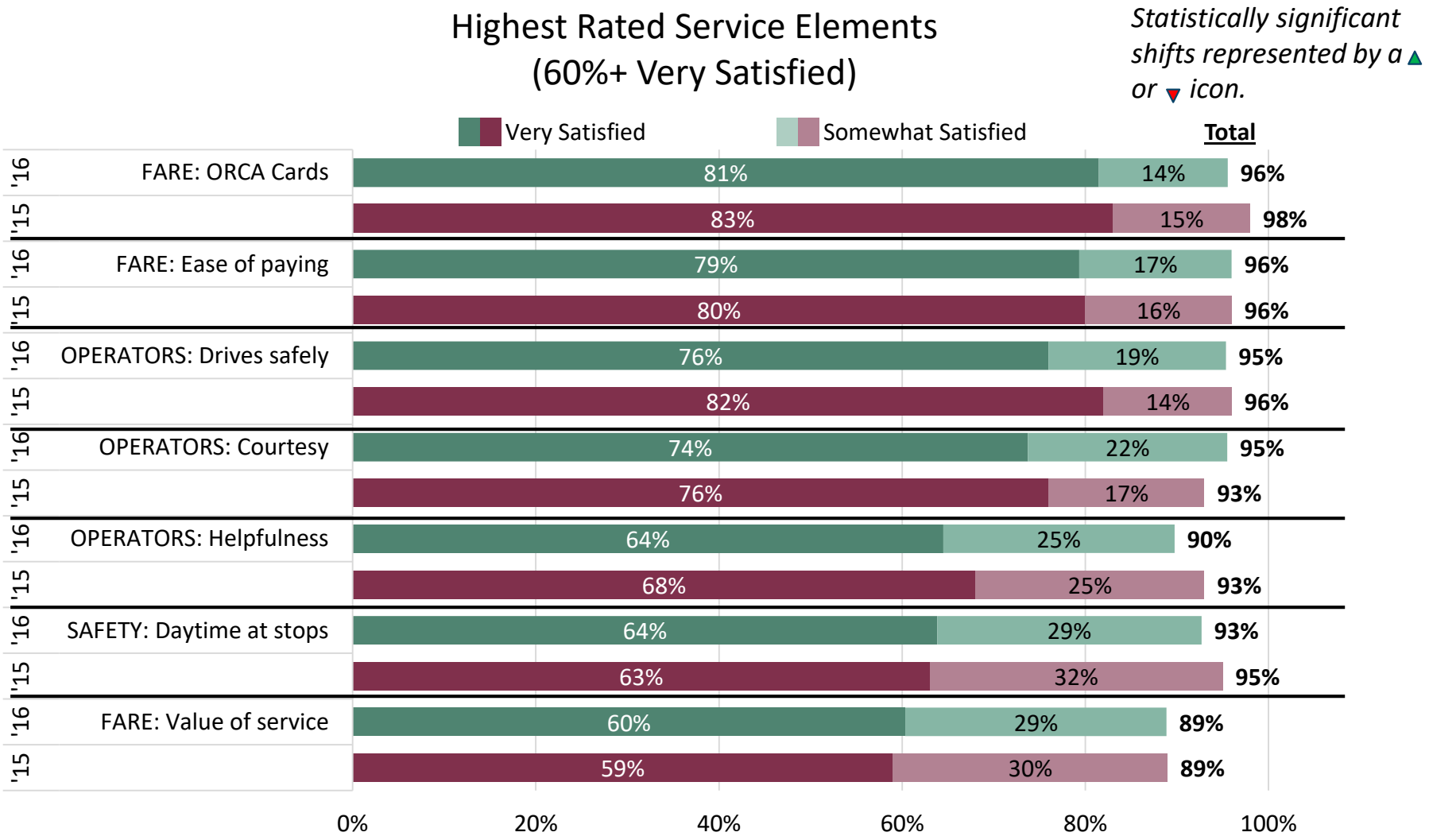
General satisfaction (including "very" and "somewhat satisfied" ratings) is relatively unchanged for most service dimensions, while satisfaction intensity ("very satisfied") is slightly lower in 2016 for the information, operator and level of service dimensions compared to 2015.



NOTE: The 2016 aggregate category ratings use the mean "very satisfied" and "somewhat satisfied" ratings for the individual elements included in each respective service dimension. The aggregated 2015 dimension ratings have been recalculated to include only the elements tested in both 2015 and 2016 versions of the survey.

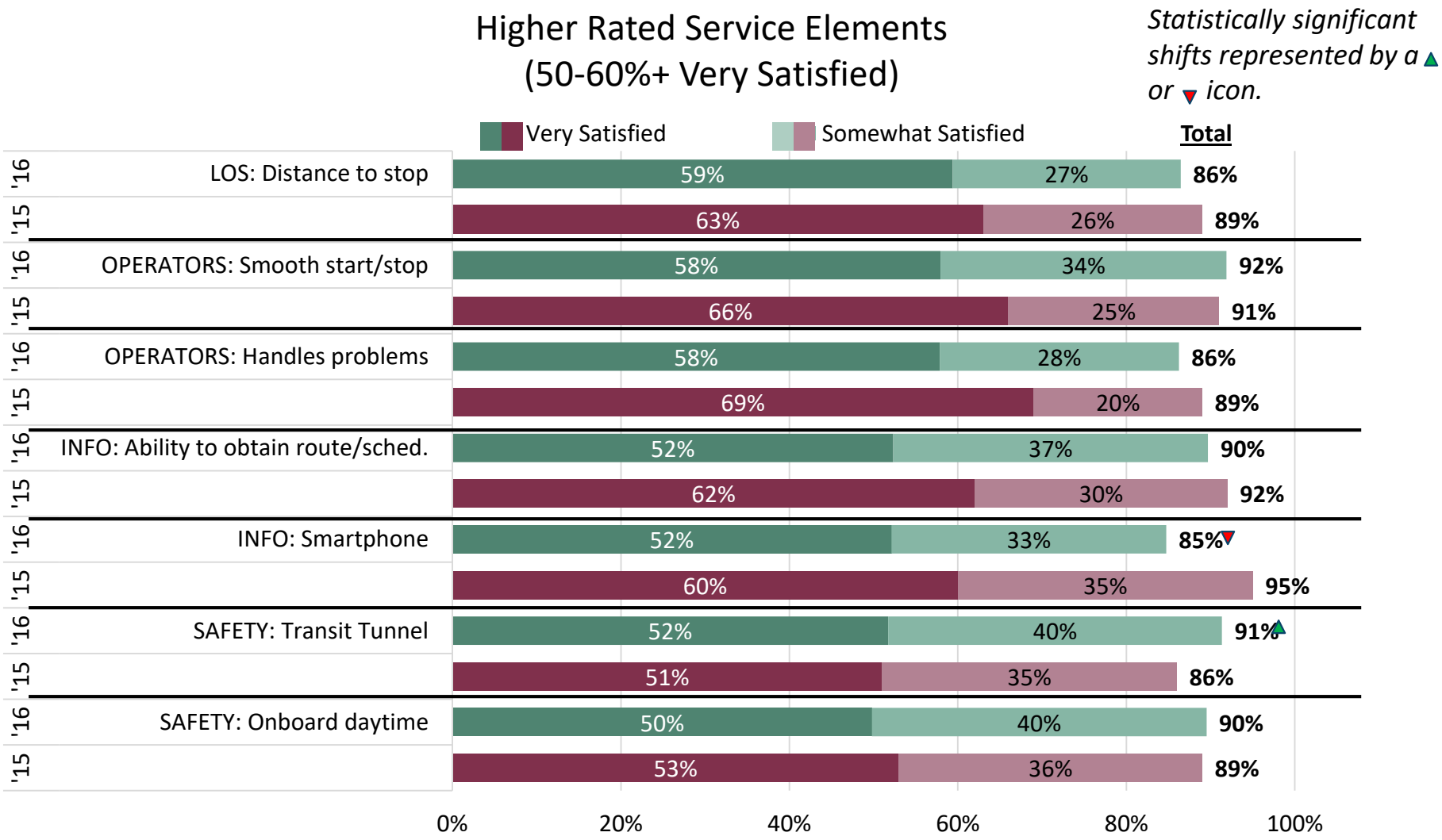
Individual Element Satisfaction – Highest Rated

Most of 2015's highest-rated service attributes remain the highest rated in 2016. While intensity ("very satisfied") are lower for operators driving safely, overall satisfaction is largely unchanged.



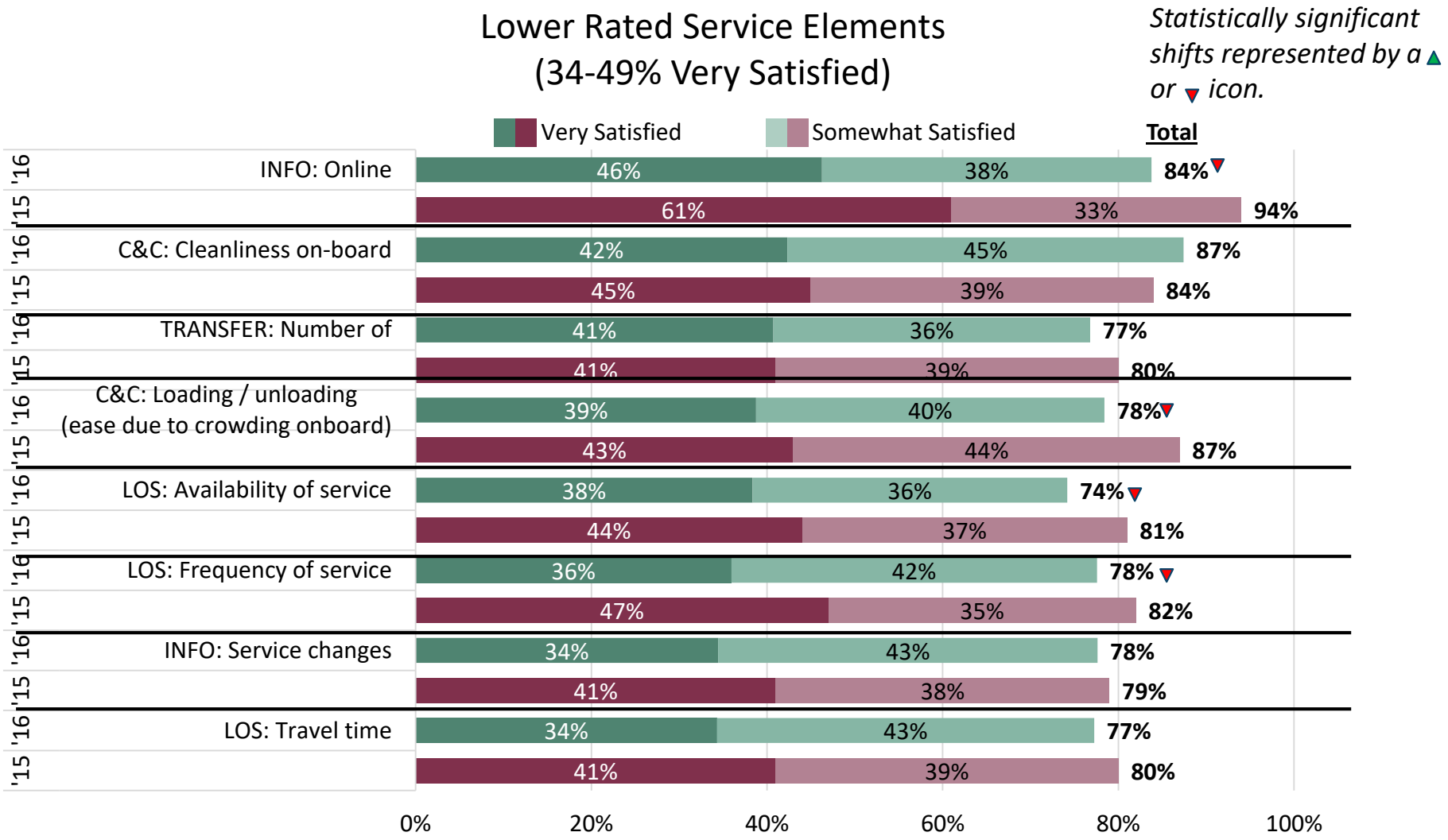
Individual Element Satisfaction – Higher Rated

Several elements – including a couple of the operator ratings and overall ability to get route/schedule information – have decreased in intensity ("very satisfied") but overall satisfaction is on-par with previous years. Satisfaction with info via smartphone has dropped, however.



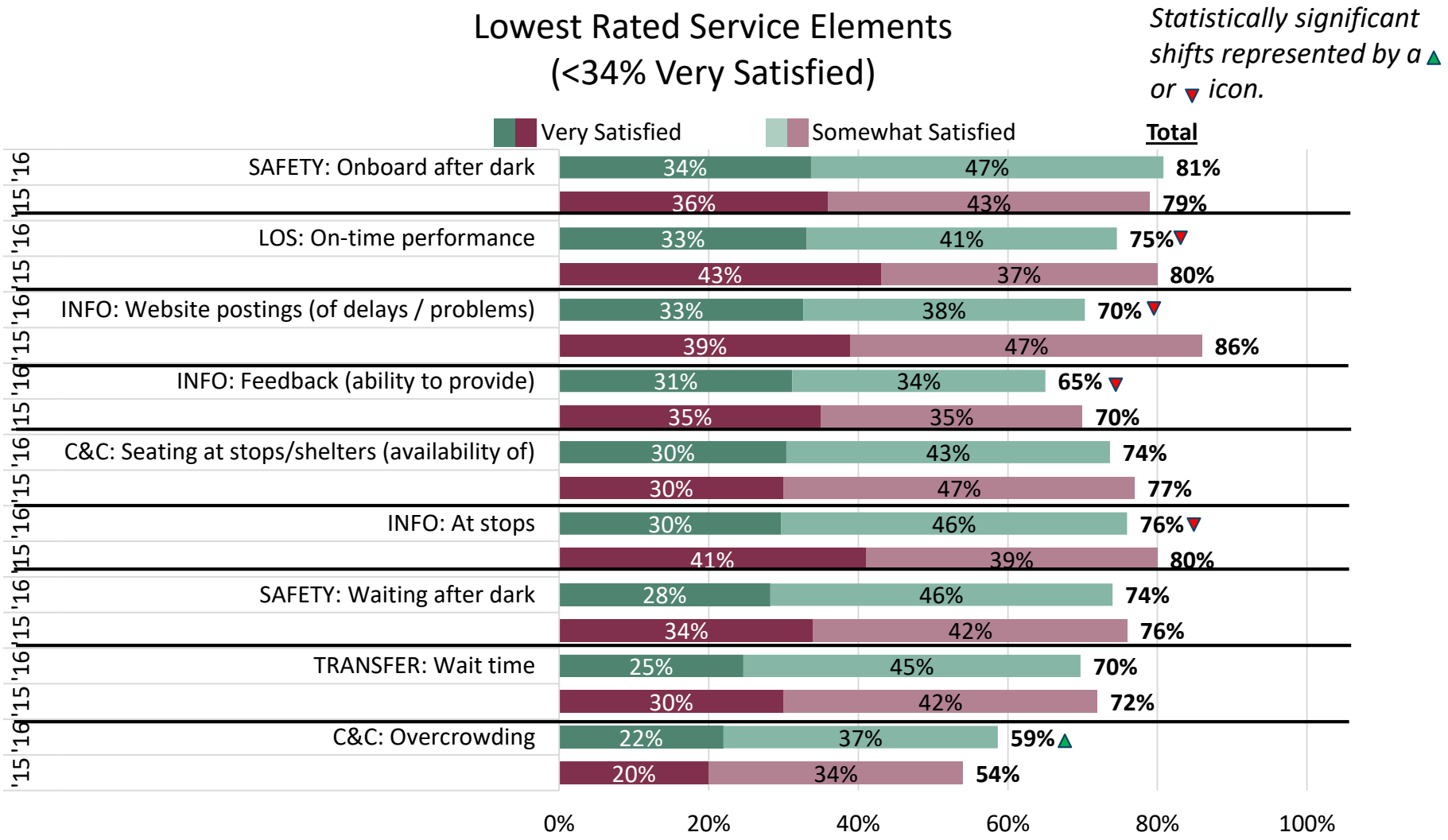
Individual Element Satisfaction – Lower Rated

Satisfaction ratings for the availability of info online, frequency of service, on-time performance, loading/unloading due to crowding, and information at stops have each dropped from 2015.



Individual Element Satisfaction – Lowest Rated

Since 2015, satisfaction with several of the level of service and information-related elements attributes have dropped, both overall and in intensity. Website postings of delays, the ability to give feedback and information at stops are lower year-over-year. On-time performance has also dropped slightly.

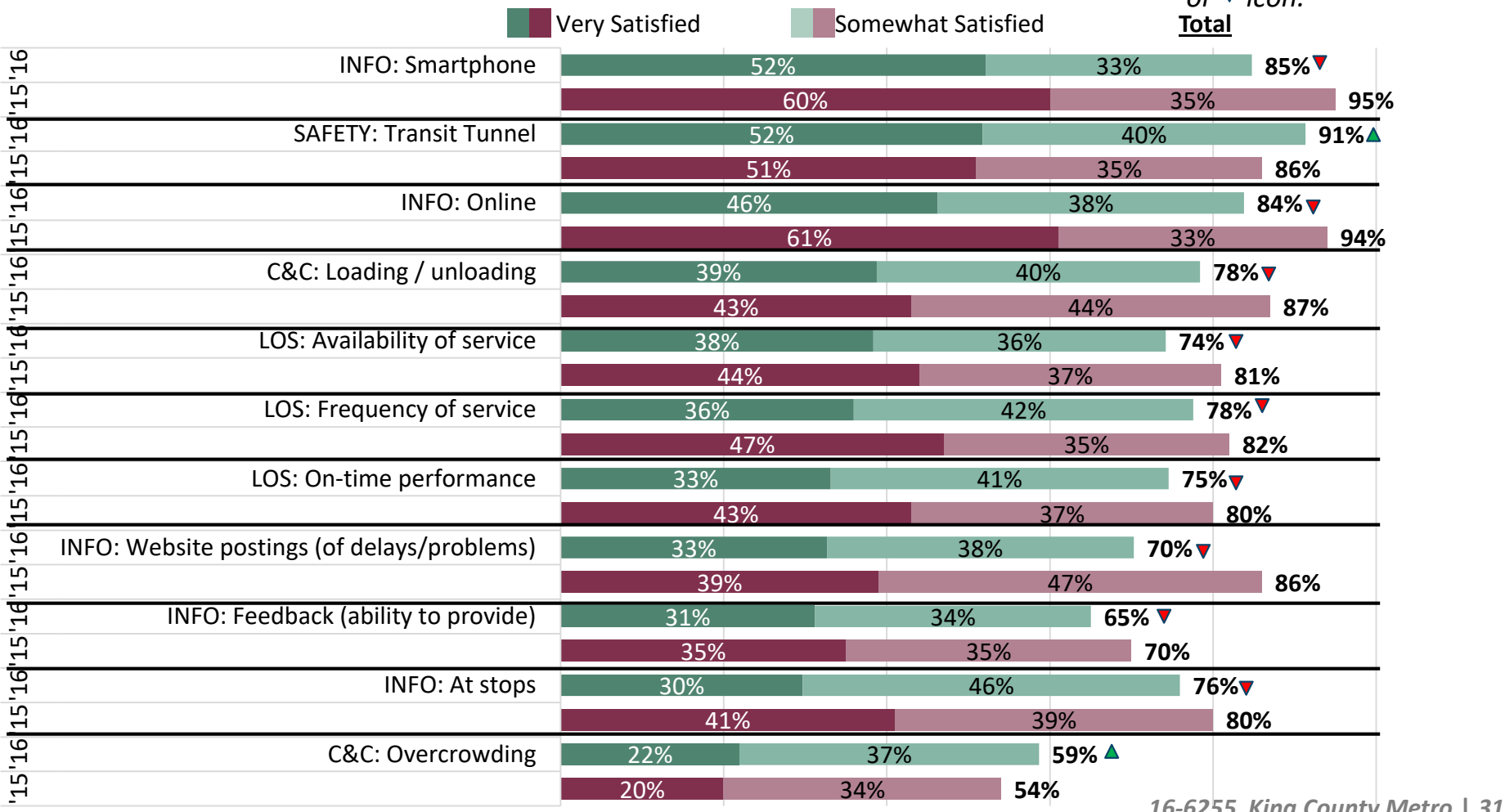


Element Satisfaction – Significant Shifts Only

Web postings of delays (-16% "Satisfied"), online schedules (-10), info via smartphone (-10), and ease of loading/unloading on crowded buses (-9) saw the steepest declines of individual elements from 2015 to 2016. Ratings for safety in the transit tunel (+5%) and overcrowding (+5) both increased.

Service Elements with Significant Shifts in Satisfaction Ratings from 2015 to 2016

Statistically significant shifts represented by a ▲ or ▼ icon.



Individual Element Satisfaction – Highest Rated

Below is a comparison of only the "very satisfied" percentages from 2014 to 2016. There is more variation in satisfaction intensity than in satisfaction as a whole, as much of the "very satisfied" ratings have shifted to "somewhat satisfied" rather than dissatisfied. This suggests that, although riders may not be rating these elements as enthusiastically as in previous years, they aren't necessarily dissatisfied with those aspects of Metro's service.

Very Satisfied %	2014	2015	2016
FARE: ORCA Cards	87%	83%	81%
FARE: Ease of paying	81%	81%	79% ▼
OPERATORS: Drives safely	74%	82%	76% ▼
OPERATORS: Courtesy		76%	74% ▼
OPERATORS: Helpfulness	66%	68%	64% ▼
SAFETY: Daytime at stops	70%	63%	64%
FARE: Value of service	62%	59%	60% ▼
LOS: Distance to stop	52%	63%	59% ▼
OPERATORS: Smooth start/stop		66%	58% ▼
OPERATORS: Handles problems	55%	69%	58% ▼
INFO: Ability to obtain	63%	62%	52% ▼
INFO: Smartphone		60%	52%
SAFETY: Transit tunnel	51%	51%	52%
SAFETY: Onboard daytime	59%	53%	50%

Individual Element Satisfaction – Lowest Rated

Satisfaction intensity is lower for several elements in 2016, particularly for some of the level of service and information–related items. However, in most cases, this has not translated to increased dissatisfaction.

Very Satisfied %	2014	2015	2016
INFO: Online	71%	61%	46% ▼
ONBOARD: Cleanliness	47%	45%	42%
TRANSFER: Number of	35%	41%	41%
ONBOARD: Loading / unloading (ease due to crowding onboard)	36%	35%	39% ▲
LOS: Availability of service	40%	44%	38% ▼
LOS: Frequency of service	36%	47%	36% ▼
INFO: Service changes		41%	34% ▼
LOS: Travel time	41%	41%	34% ▼
SAFETY: Onboard after dark	37%	36%	34% ▼
LOS: On-time performance	41%	43%	33% ▼
INFO: Website postings (of delays / problems)		39%	33% ▼
INFO: Feedback (ability to provide)		35%	31% ▼
STOPS: Seating (availability of)	29%	27%	30%
INFO: At stops	45%	41%	30% ▼
SAFETY: Waiting after dark	28%	34%	28% ▼
TRANSFER: Wait time	26%	30%	25% ▼
ONBOARD: Overcrowding	21%	20%	22%

Individual Element Satisfaction – Highest Rated

Riders in East King give higher "very satisfied" ratings to nearly every service element compared to riders in other areas. As the sole exception, East county riders are the least satisfied with the distance to the bus stop, which is fitting considering the relatively lower transit density across residential neighborhoods in that sub-area.

Very Satisfied %	Seattle/North King	South King	East King
FARE: ORCA Cards	79%	86%	89%
FARE: Ease of paying	80%	75%	81%
OPERATORS: Drives safely	77%	70%	80%
OPERATORS: Courtesy	74%	68%	78%
OPERATORS: Helpfulness	66%	58%	65%
SAFETY: Daytime at stops	63%	56%	76%
FARE: Value of service	61%	55%	62%
LOS: Distance to stop	65%	52%	46%
OPERATORS: Smooth start/stop	57%	56%	63%
OPERATORS: Handles problems	55%	54%	71%
INFO: Ability to obtain	52%	50%	57%
INFO: Smartphone	52%	50%	55%
SAFETY: Transit tunnel	53%	43%	58%
SAFETY: Onboard daytime	47%	42%	68%

Individual Element Satisfaction – Lowest Rated

Intensity-wise, South King riders are generally less satisfied with on-board cleanliness, transfer wait times, operator safety and courtesy and all safety aspects than riders in other areas. Efforts to improve these service aspects in South King could have a relatively high impact on overall satisfaction with those attributes.

Very Satisfied %	Seattle/North	South King	East King
INFO: Online	44%	48%	51%
ONBOARD: Cleanliness	41%	36%	52%
TRANSFER: Number of	39%	45%	44%
ONBOARD: Loading / unloading (ease due to crowding onboard)	38%	34%	48%
LOS: Availability of service	37%	42%	41%
LOS: Frequency of service	34%	34%	44%
INFO: Service changes	33%	34%	41%
LOS: Travel time	32%	36%	42%
SAFETY: Onboard after dark	32%	25%	51%
LOS: On-time performance	32%	35%	37%
INFO: Website postings (of delays / problems)	31%	35%	38%
INFO: Feedback (ability to provide)	31%	29%	34%
STOPS: Seating (availability of)	29%	30%	37%
INFO: At stops	28%	33%	31%
SAFETY: Waiting after dark	28%	22%	36%
TRANSFER: Wait time	25%	17%	35%
ONBOARD: Overcrowding	22%	19%	26%

Individual Element Satisfaction – Highest Rated

Riders from lower-income households are consistently less satisfied (intensity-wise) with some service elements relating to fare payment, operator courtesy and helpfulness.

Very Satisfied %	<$35K	$35-$100K	>$100K
FARE: ORCA Cards	74%	83%	84%
FARE: Ease of paying	70%	84%	83%
OPERATORS: Drives safely	72%	75%	78%
OPERATORS: Courtesy	67%	75%	75%
OPERATORS: Helpfulness	59%	68%	63%
SAFETY: Daytime at stops	65%	65%	64%
FARE: Value of service	55%	61%	65%
LOS: Distance to stop	70%	58%	57%
OPERATORS: Smooth start/stop	61%	57%	55%
OPERATORS: Handles problems	58%	53%	62%
INFO: Ability to obtain	51%	55%	50%
INFO: Smartphone	51%	53%	48%
SAFETY: Transit tunnel	59%	51%	53%
SAFETY: Onboard daytime	47%	54%	49%

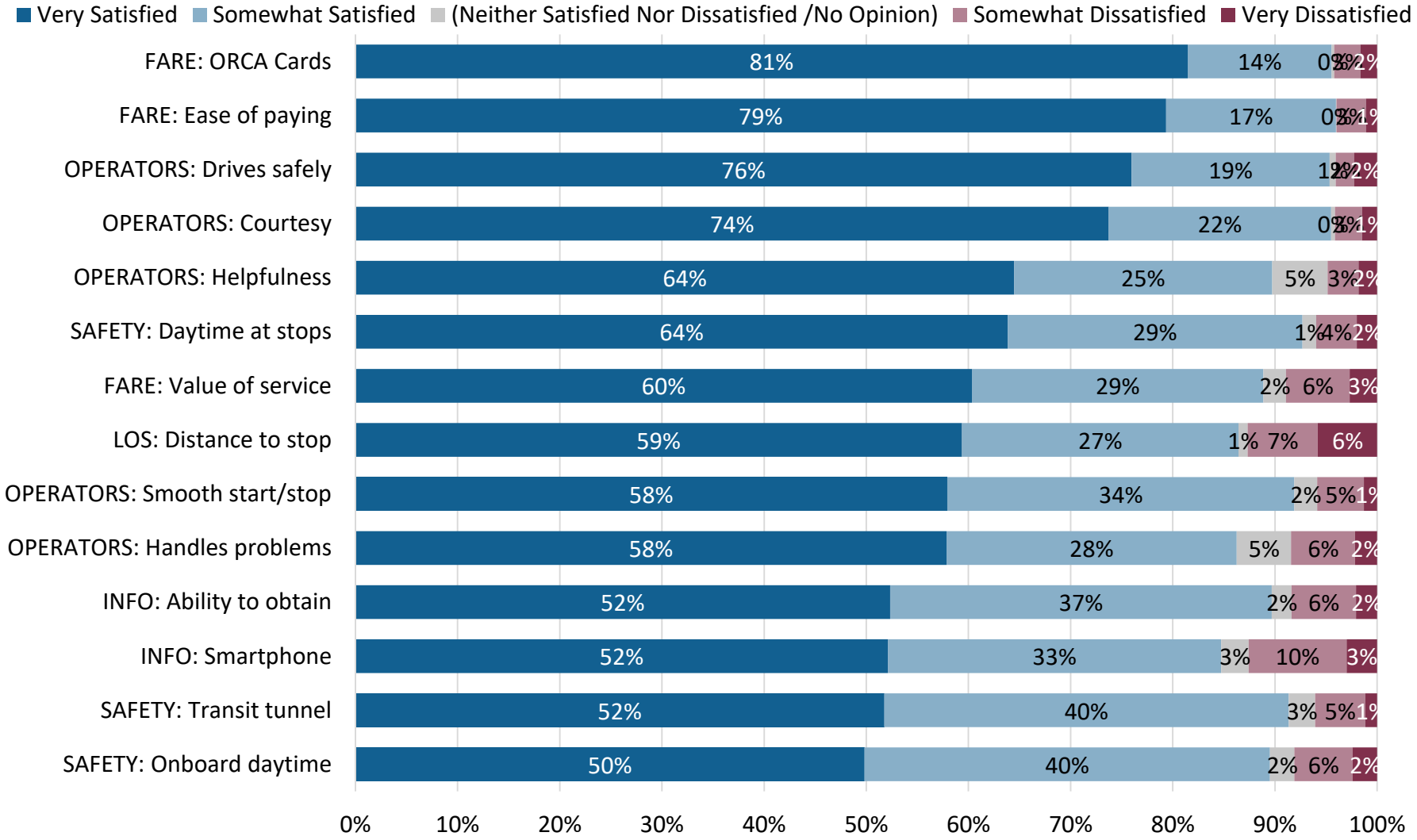
Individual Element Satisfaction – Lowest Rated

Riders from higher-income households are the least satisfied with cleanliness, travel time, the availability of info at stops and the ability to give feedback to Metro.

Very Satisfied %	<$35K	$35-$100K	>$100K
INFO: Online	43%	48%	46%
ONBOARD: Cleanliness	51%	39%	38%
TRANSFER: Number of	45%	39%	39%
ONBOARD: Loading / unloading (ease due to crowding onboard)	38%	40%	38%
LOS: Availability of service	37%	42%	37%
LOS: Frequency of service	32%	35%	36%
INFO: Service changes	35%	34%	32%
LOS: Travel time	44%	38%	25%
SAFETY: Onboard after dark	36%	30%	38%
LOS: On-time performance	46%	33%	26%
INFO: Website postings (of delays / problems)	28%	39%	29%
INFO: Feedback (ability to provide)	41%	29%	25%
STOPS: Seating (availability of)	32%	31%	29%
INFO: At stops	36%	33%	23%
SAFETY: Waiting after dark	33%	24%	32%
TRANSFER: Wait time	22%	29%	20%
ONBOARD: Overcrowding	26%	23%	20%

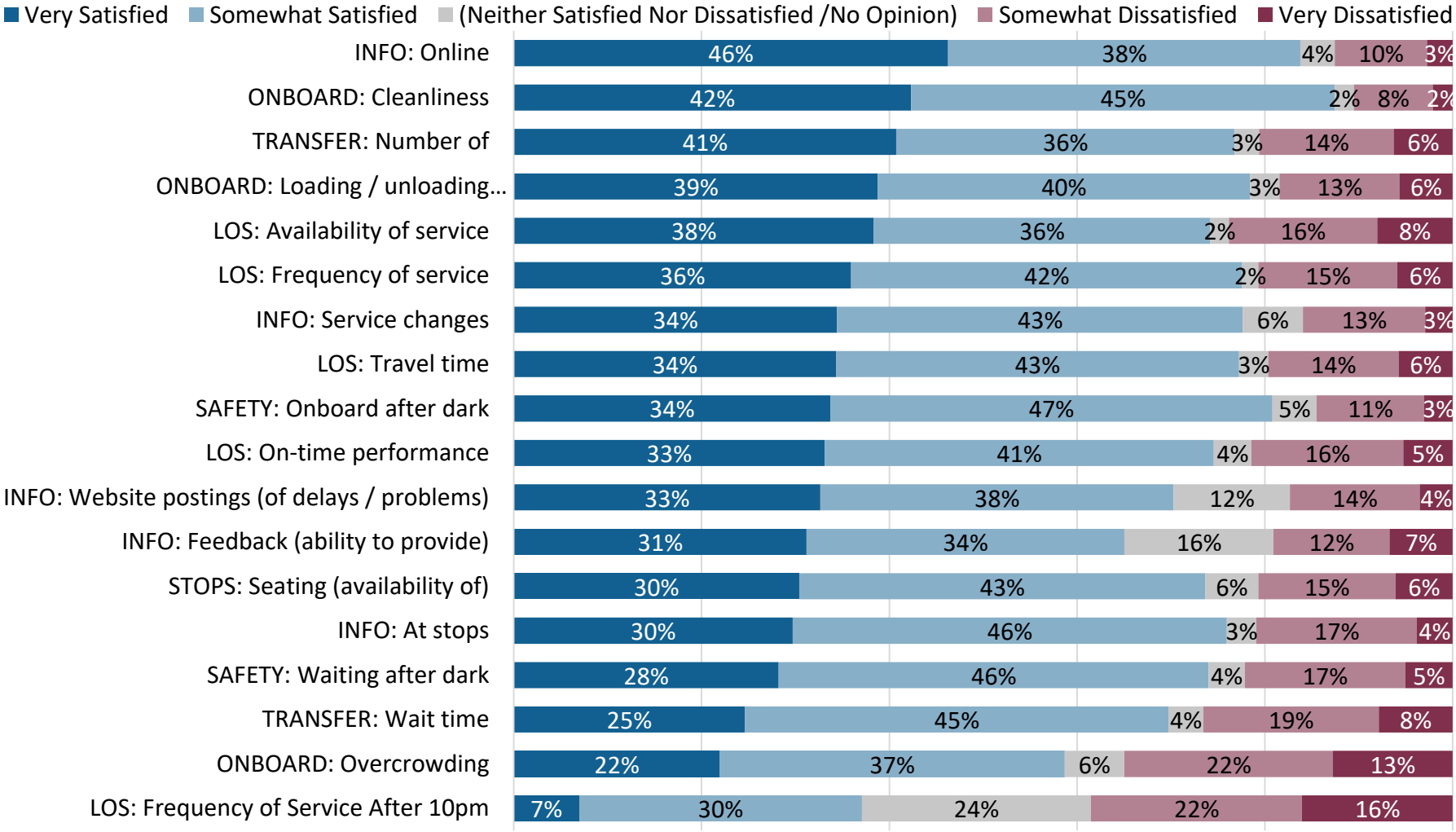
Individual Element Satisfaction – Highest Rated

Several fare and operator-related items remain the highest-rated elements in 2016 – both in intensity and in overall satisfaction. Of the highest-rated attributes, only distance to stop and availability of info on smartphones have non-negligible dissatisfaction ratings.



Individual Element Satisfaction – Lowest Rated

Of the elements asked of all riders, overcrowding received the highest level of dissatisfied ratings. Satisfaction intensity is also lower for transfer wait times, night time stop safety, information and the availability of seating at stops and the ability to provide feedback, including complaints and commendations. Fewer than a third of riders are "very satisfied" with each of these elements.



Note: Frequency of service after 10pm was as only asked of respondents who gave less than perfect rating for "Frequency of Service" and is predisposed to lower satisfaction ratings.

Individual Elements – Net Satisfaction Ranking

Riders show strong net satisfaction (Satisfied-minus-Dissatisfied %) for most attributes. Nighttime service frequency has the only net-dissatisfied rating, while overcrowding, transfer wait times and the availability to give feedback receive the lowest net ratings.

High net sat. (+80%=blue), Moderate net sat. (+50-71%=green), Low net sat. (+20-49=orange), Very Low net sat. (<20%=red)

Service Element	Total Satisfied (Very+ Smwt)	Total Dissatisfied (Very+Smwt)	*Net Satisfied (Sat. over Dissat. +/-)*		Service Element	Total Satisfied (Very+ Smwt)	Total Dissatisfied (Very+Smwt)	*Net Satisfied (Sat. over Dissat. +/-)*
FARES: Ease of paying	96%	4%	*+92%*		SAFETY: Nighttime safety w/ others	81%	14%	*+66%*
FARES: ORCA card overall	96%	4%	*+91%*		INFO: Service change notification	78%	16%	*+62%*
OPERATORS: Driver courtesy	95%	4%	*+91%*		C&C: Ease of entering/exiting	78%	18%	*+60%*
OPERATORS: Driver safe & competent	95%	4%	*+91%*		LOS: Travel time	77%	20%	*+58%*
SAFETY: Safety waiting daytime	93%	6%	*+87%*		LOS: Frequency of service	78%	21%	*+57%*
OPERATORS: Starting/stopping smoothly	92%	6%	*+86%*		TRANSFERS: Number of transfers	77%	21%	*+56%*
SAFETY: Safety in DT transit tunnel	91%	6%	*+85%*		INFO: Info at stops	76%	21%	*+55%*
OPERATORS: Driver helpfulness	90%	5%	*+85%*		LOS: On-time performance	75%	21%	*+53%*
SAFETY: Daytime safety w/ others	90%	8%	*+81%*		C&C: Seating availability at stops	74%	21%	*+53%*
FARES: Value of service	89%	9%	*+80%*		INFO: Website delay posting	70%	17%	*+53%*
OPERATORS: Drivers handling problems	86%	8%	*+78%*		SAFETY: Safety waiting after dark	74%	22%	*+52%*
C&C: Cleanliness on-board	87%	11%	*+77%*		LOS: Availability of service	74%	24%	*+50%*
LOS: Distance to stop	86%	13%	*+74%*		INFO: Feedback ability	65%	19%	*+46%*
INFO: Info on smartphones	85%	13%	*+72%*		TRANSFERS: Transfer wait time	70%	27%	*+43%*
INFO: Info online	84%	13%	*+71%*		C&C: Overcrowding on-board	59%	35%	*+24%*
					LOS: Nighttime frequency	37%	39%	*-1%*

King County METRO

Key Driver Analysis

Key Drivers Analysis

A Key Driver Analysis, also referred to as an importance/performance analysis, evaluates the relationships between riders' satisfaction with individual service elements and King County Metro as a whole to identify the most important areas to focus on improving and maintaining.

By doing an analysis of riders' overall satisfaction with Metro and their ratings for each of the individual service elements, we can estimate which items have the strongest impact on riders' overall level of satisfaction with the agency. For this analysis, we have converted each satisfaction into a 5-point scale (Very Satisfied=5, Somewhat Satisfied=4, Neither Satisfied Nor Dissatisfied=3, Somewhat Dissatisfied=2, and Very Dissatisfied=1) and run the mean rating for each element tested in the survey.

Service element importance is determined using a regression analysis of the relationship between each element's satisfaction rating and Metro's overall service rating. This analysis helps identify which individual elements have the strongest impact on overall satisfaction with the service. In the following quadrant charts, the relative importance levels are shown vertically, with the more important elements (having a stronger impact on overall satisfaction) appear higher on the chart and less important elements (having a weaker impact on overall satisfaction) appear lower on the chart.

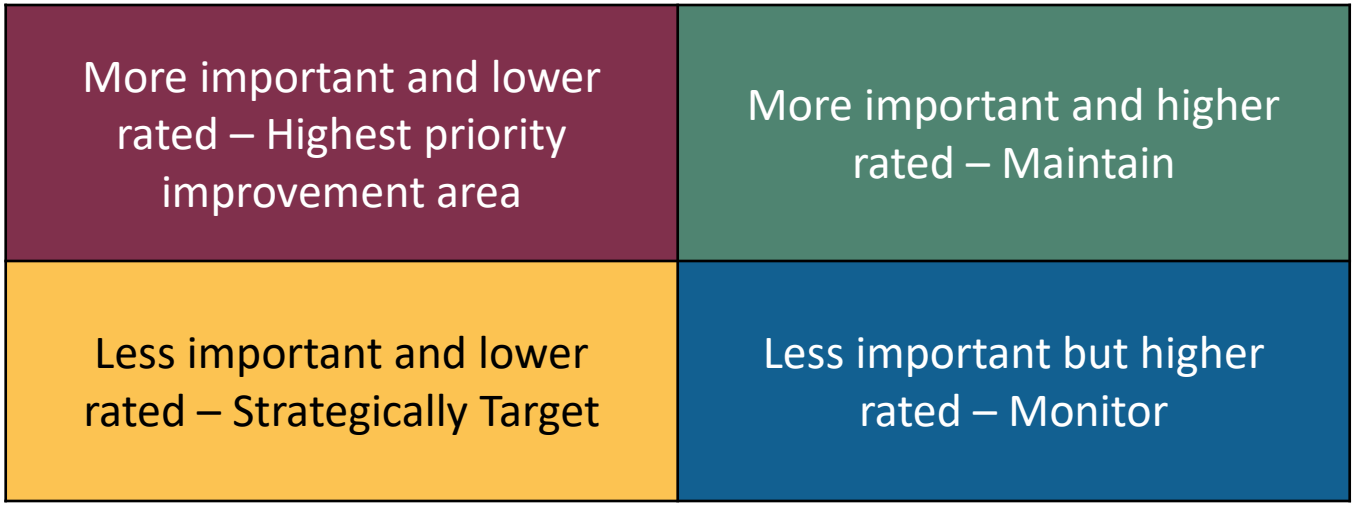
The Key Drivers Analysis classifies the relative levels of importance and performance into four general categories:

More important and lower rated – Highest priority improvement area
More important and higher rated – Maintain
Less important but higher rated – Monitor
Less important and lower rated – Strategically Target

Key Drivers Analysis

A Key Driver graph plots the results in a two-dimensional chart. Each element satisfaction rating is plotted on the graph by its importance to overall agency satisfaction (on the x-axis) and the performance in that area on the y-axis.

This generates four quadrants. The most important is the top-left quadrant. The items plotted here have high importance to riders but their satisfaction in those areas is relatively low. These are the areas where improvements will have the biggest impact and generate the greatest increase in customer satisfaction for the effort.



Key Drivers Analysis – Service Dimensions

*As broader service dimensions, **Level of Service, Information Sources,** and **Transfers** are key improvement areas for Metro. These include many of the most important attributes that are also lower rated.*

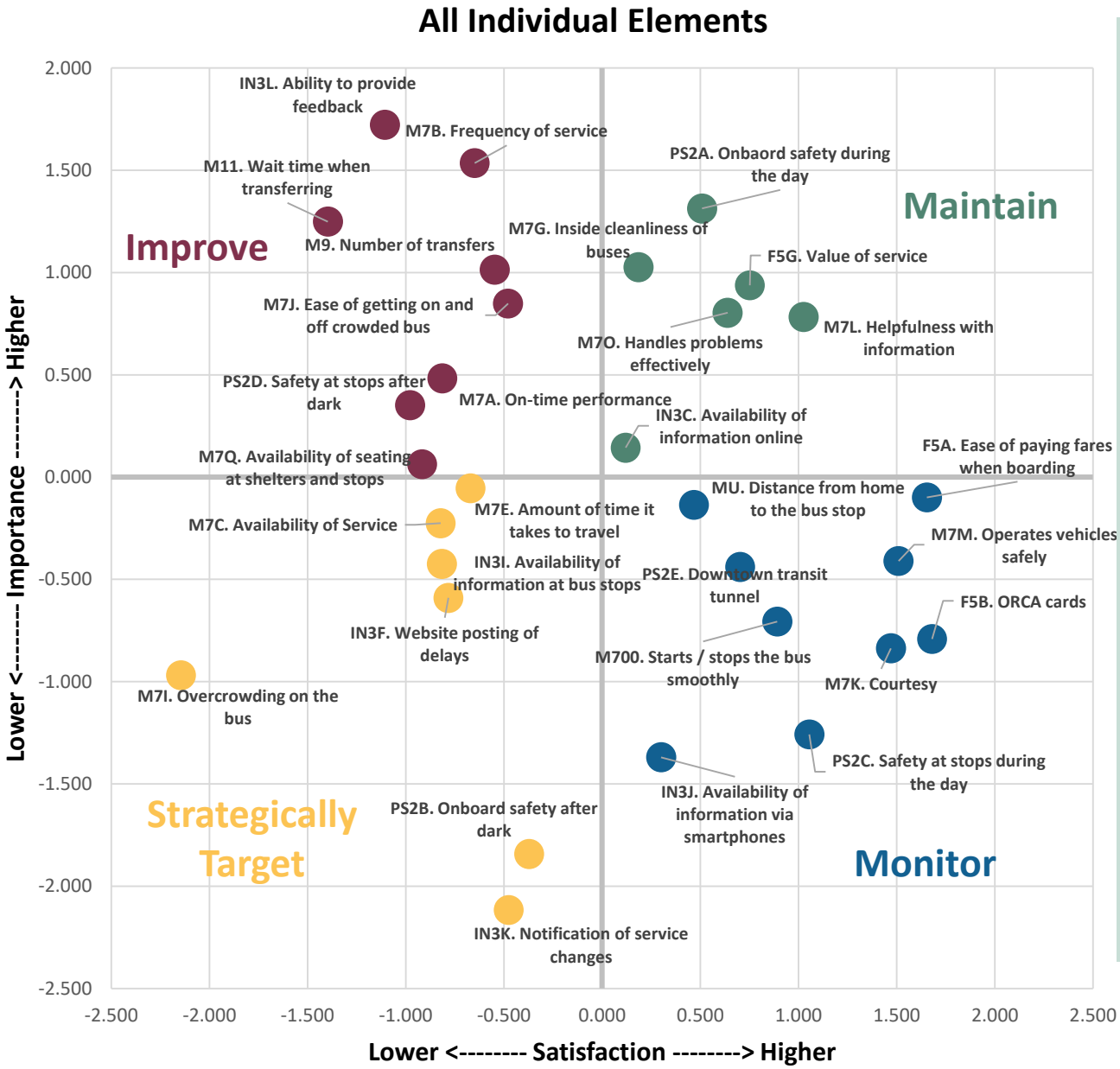
*As the second-most important service attribute, **Personal Safety** is a key maintenance target. Metro should continue to focus efforts on safety to keep it from slipping into the improvement category.*

***Comfort and Cleanliness** is the least important of the broader service dimensions but it's also one of the lowest performing. Metro will want to strategically some of these elements, particularly the ease of getting on/off crowded vehicles and the availability of seating at stops.*

*Finally, Metro's **Operators** and **Fare Payment** are currently the highest rated but also have less bearing on overall satisfaction than other service dimensions. It will be worth tracking these for possible changes in the future.*

**Arrows indicate the approximated directional shift from relative importance/satisfaction position in 2015.*

Key Drivers Analysis – Individual Elements



Comparing all of the individual elements together, Metro will need to focus on a variety of items for immediate improvement. These elements span a number of different service dimensions and include, in order of importance:

1) ***Ability to provide feedback***
2) ***Frequency of service***
3) ***Transfer wait times***
4) ***Number of transfers***
5) ***Ease of getting on/off crowded buses***
6) ***On-time performance***
7) ***Safety of stops after dark***
8) ***Availability of seating at stops***

Additionally, there are some maintenance and strategic target items that are borderline improvement priorities, including ***travel time***, ***availability of service***, ***interior cleanliness*** *and* ***the availability of information online****.*

Key Drivers Analysis – Full Element List

The following table shows the satisfaction ratings and importance rankings, as well as the recommended prioritization strategy for each individual service element within its respective service dimension.

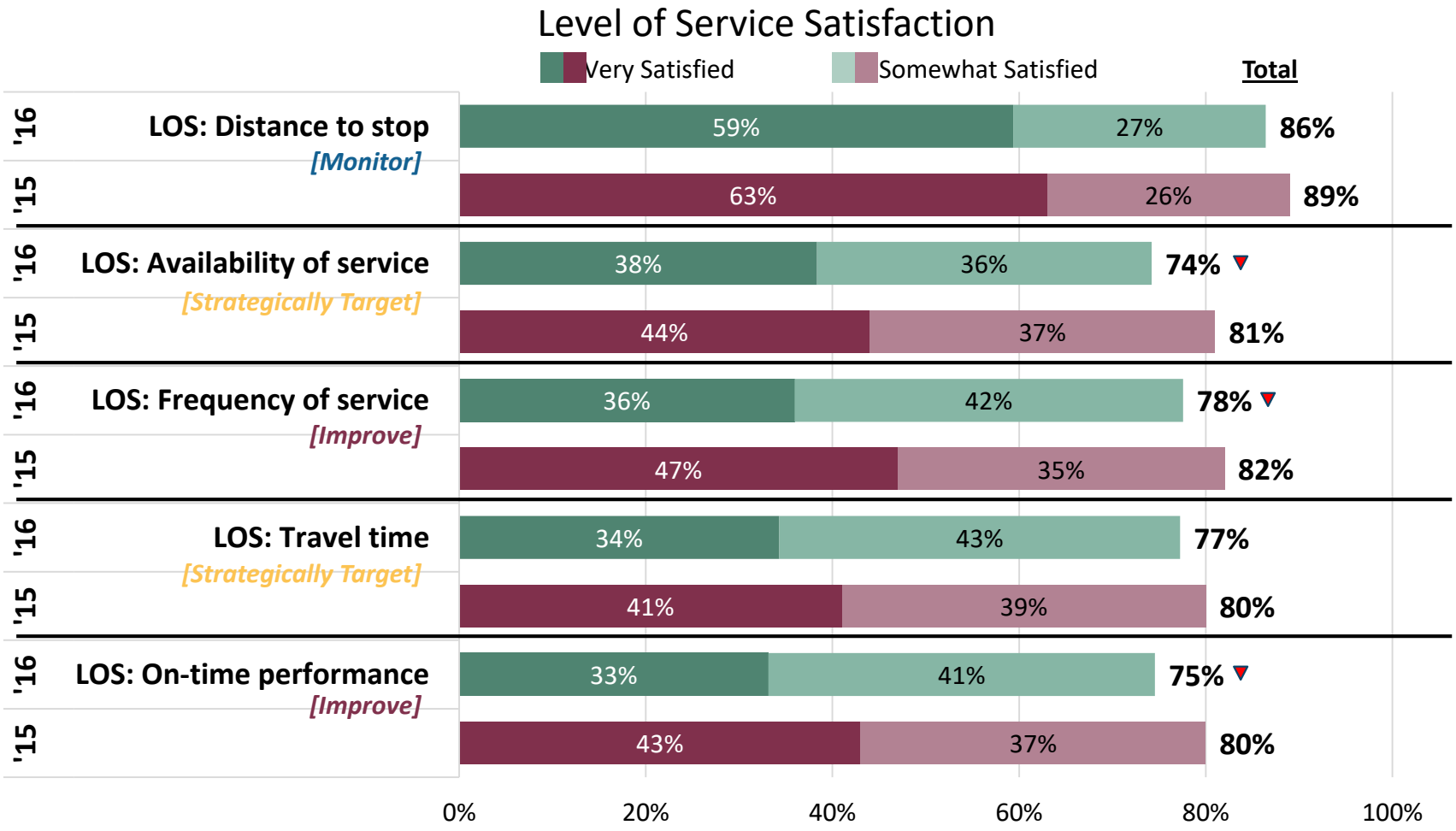
Service Dimensions and Elements	Importance	Very Satisfied %	Mean Satisfaction	Strategy
Level of Service	**1**	**40% (Average)**	**3.92**	**Improve**
Frequency of service	1	36%	3.87	Improve
On-time performance	2	33%	3.81	Improve
Travel time	3	34%	3.86	Strategically Target
Distance to stop	4	59%	4.27	Monitor
Availability of service	5	38%	3.81	Strategically Target
Personal Safety	**2**	**44% (Average)**	**4.19**	**Maintain**
Onboard during the day	1	50%	4.29	Maintain
Waiting at stops after dark	2	28%	3.75	Improve
Downtown transit tunnel	3	52%	4.36	Monitor
Waiting at stops during the day	4	64%	4.49	Monitor
Onboard after dark	5	34%	3.97	Strategically Target
Information Sources	**3**	**38% (Average)**	**3.98**	**Improve**
Ability to provide feedback	1	31%	3.70	Improve
Availability of information online	2	46%	4.15	Maintain
Availability of information at stops	3	30%	3.81	Strategically Target
Website posting of delays	4	33%	3.82	Strategically Target
Availability of information via smartphones	5	52%	4.21	Monitor
Notification of service changes	6	34%	3.93	Strategically Target
Transferring	**4**	**33% (Average)**	**3.75**	**Improve**
Wait time when transferring	1	25%	3.60	Improve
Number of transfers	2	41%	3.91	Improve
Metro Operators	**5**	**66% (Average)**	**4.51**	**Monitor**
Handles problems effectively	1	58%	4.34	Maintain
Helpfulness with information	2	64%	4.48	Maintain
Operates vehicles safely	3	76%	4.65	Monitor
Starts / stops vehicles smoothly	4	58%	4.43	Monitor
Courtesy	5	74%	4.64	Monitor
Fare Payment	**6**	**74% (Average)**	**4.58**	**Monitor**
Value of service	1	60%	4.38	Maintain
Ease of paying fares when boarding	2	79%	4.70	Monitor
ORCA cards	3	81%	4.71	Monitor
Comfort and Cleanliness	**7**	**33% (Average)**	**3.81**	**Strategically Target**
Inside cleanliness of buses	1	42%	4.17	Maintain
Ease of getting on and off crowded bus	2	39%	3.93	Improve
Availability of seating at shelters and stops	3	30%	3.77	Improve
Overcrowding on the bus	4	22%	3.33	Strategically Target

King County METRO

Level of Service Satisfaction

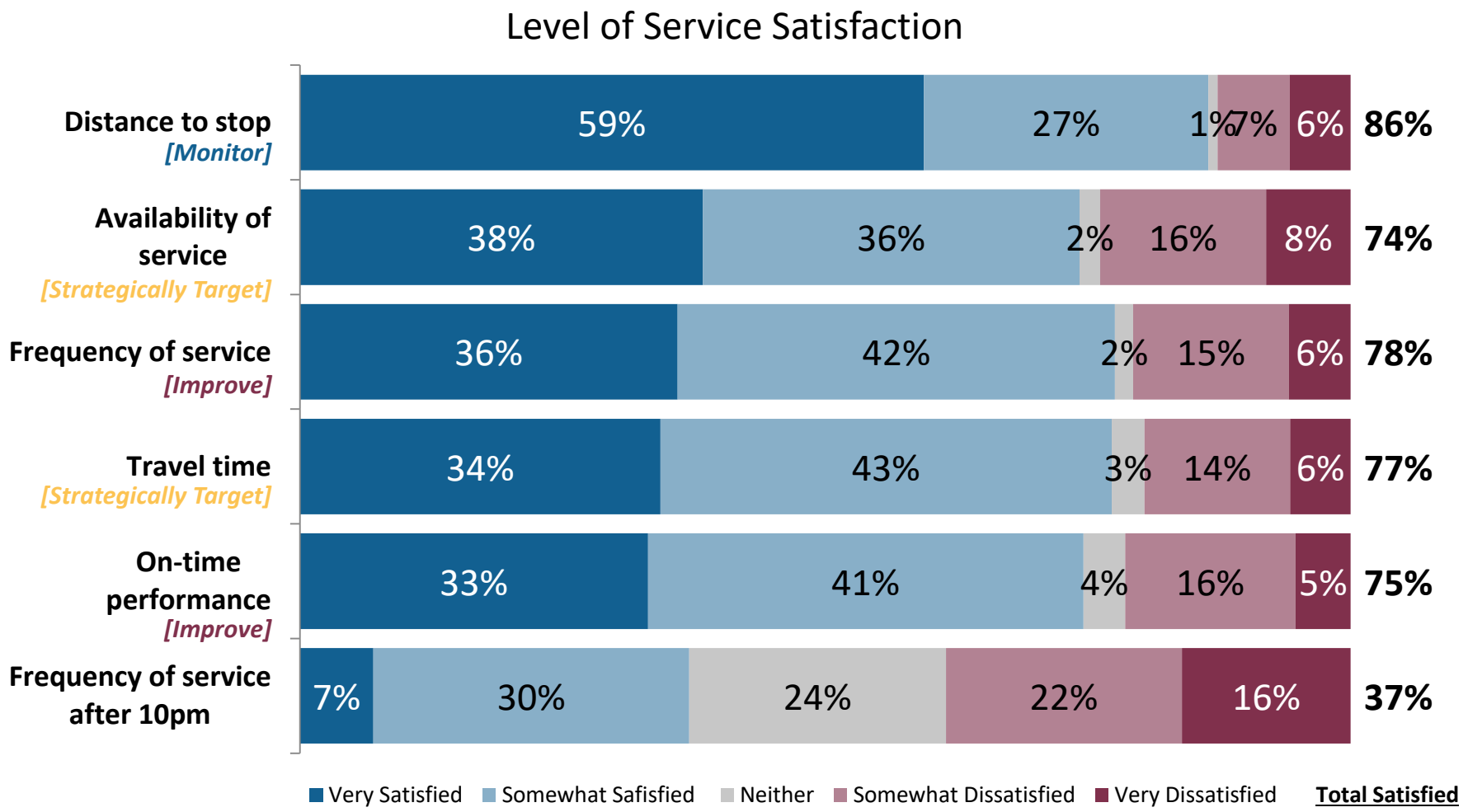
Level of Service Satisfaction – Year-to-Year

A few of the level of service indicators received drops in satisfaction from 2015 to 2016. The availability of service has fallen the most (81→74%; -7 points) while time-centric elements like on-time performance (-5%) and frequency of service (-4%) have dropped, as well. All four of the lower-rated LOS elements are either improvement targets or borderline targets and offer opportunities to help drive satisfaction with the overall agency, particularly with additional funding for more service.



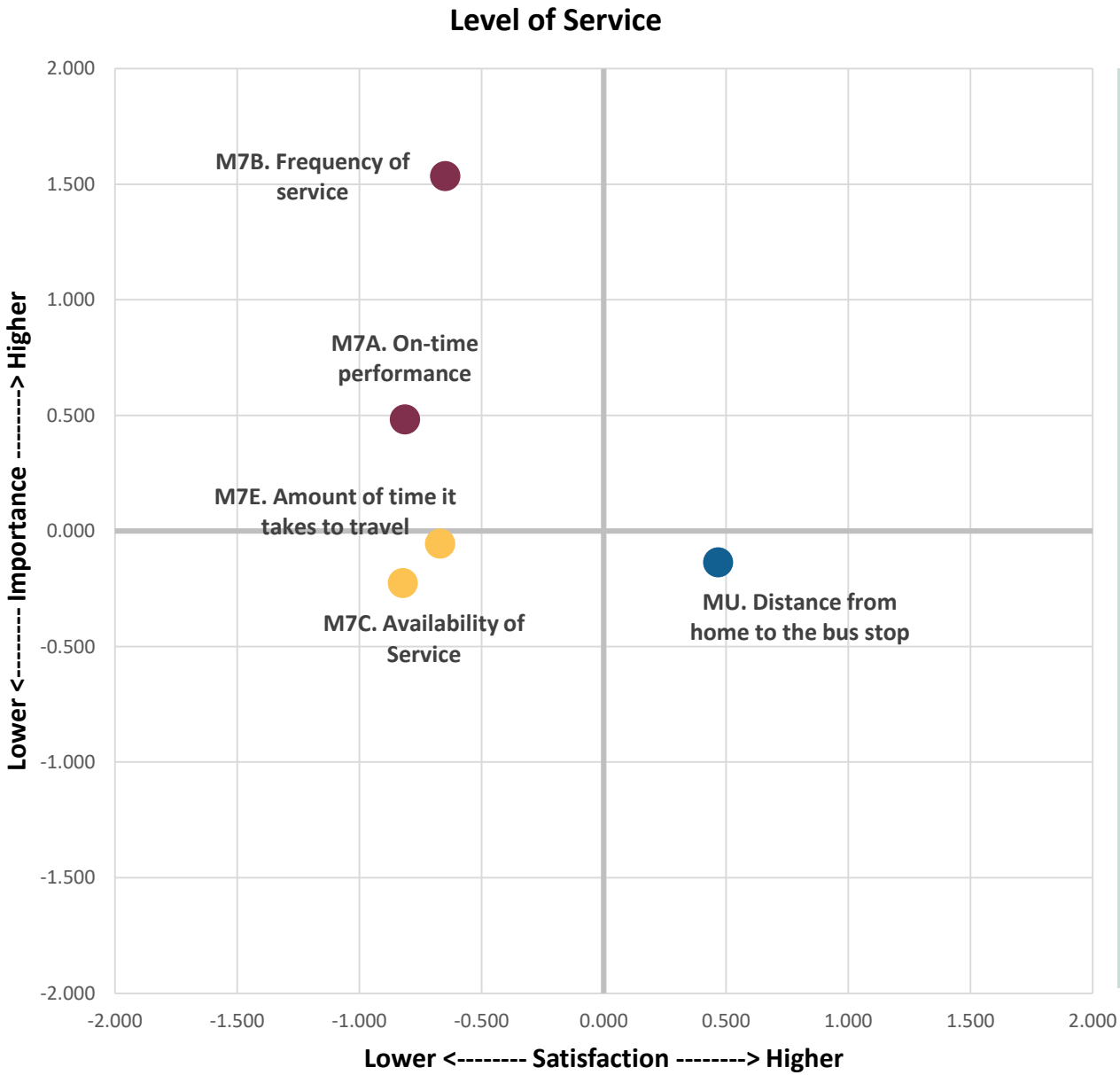
Level of Service Satisfaction – Full Ratings

About three-in-four riders are satisfied with most LOS elements (75% or higher "very" or "somewhat satisfied") with moderate dissatisfaction with each element. Frequency of service and on-time performance are the top LOS improvement priorities, followed by travel time and service availability as potential secondary targets.



Note: Frequency of service after 10pm was as only asked of respondents who gave less than perfect rating for "Frequency of Service" and is predisposed to lower satisfaction ratings. This element has been excluded from the key driver analysis.

Key Drivers: Level of Service



On-time performance *is a key improvement priority target among the level of service elements. Reducing delays and improved schedule consistency offers the highest rate of return (in overall satisfaction) for the resources required relative to other LOS items.*

Frequency of service *is one of the top improvement priorities in the survey and could yield some of the highest returns for overall satisfaction if Metro can devote additional resources towards improving it. However, given its reliance on additional funding, it's likely less practical than other potential improvement opportunities.*

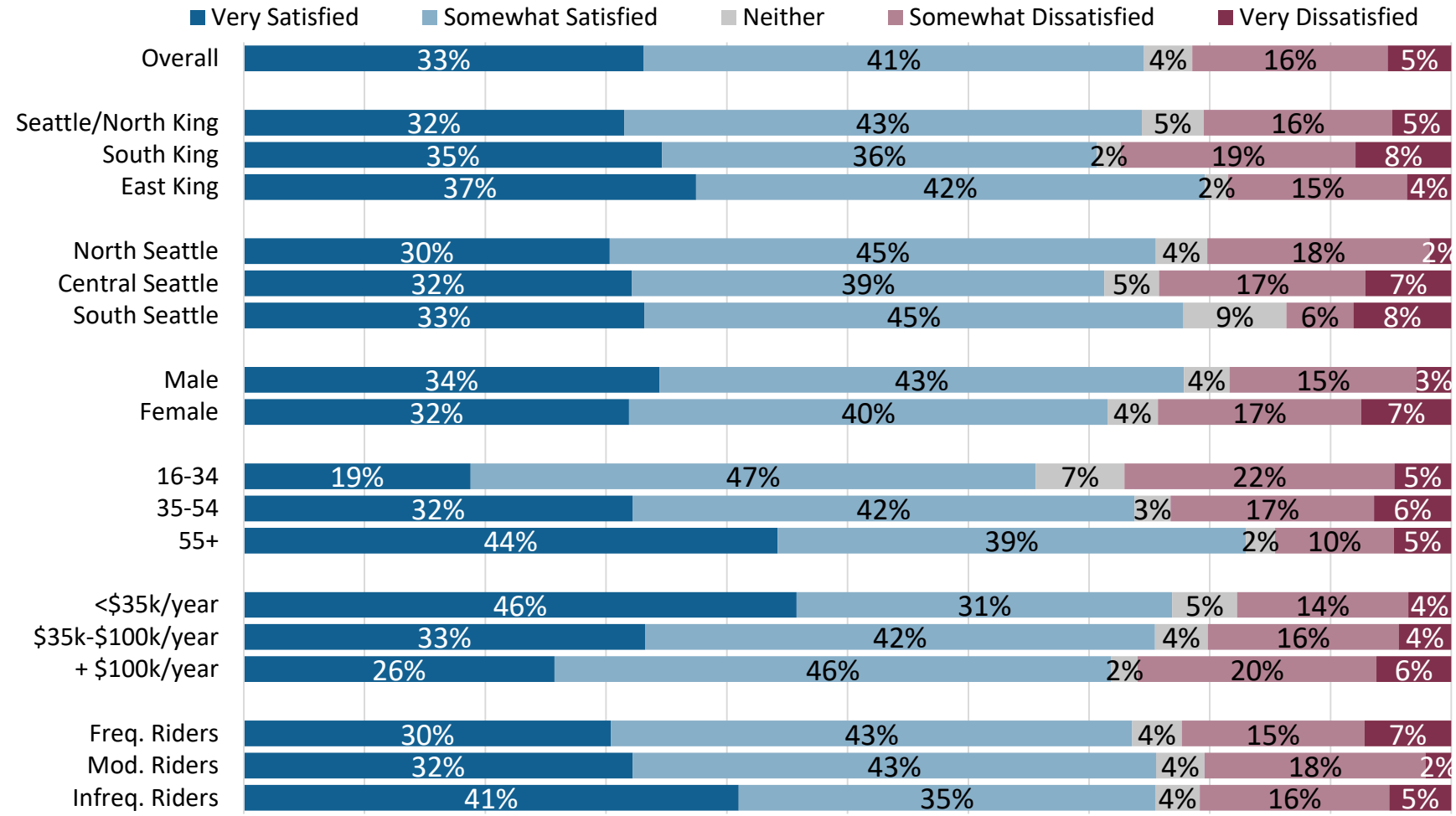
Travel time *and the* ***availability of service*** *are borderline improvement areas but may be more difficult to implement as they can be contingent on additional funding. Both would be potentially effective future initiative priorities, behind frequency of service.*

**M7B_5. Frequency of nighttime service after 10:00 p.m. has been excluded from analysis because of the small n size*

On-Time Performance

[Improvement Priority]

Three-quarters of riders rate Metro's on-time performance favorably and at least one-in-five are dissatisfied with this element, albeit with diminished intensity. Dissatisfaction is slightly higher among riders in South county than those in other areas, while younger (16-34) and high-income riders are less satisfied with on-time performance than other rider demographic groups. While requiring fewer resources than other LOS improvement targets like increased frequency and service availability, on-time performance should be a key area of focus towards improving satisfaction with Metro, overall.

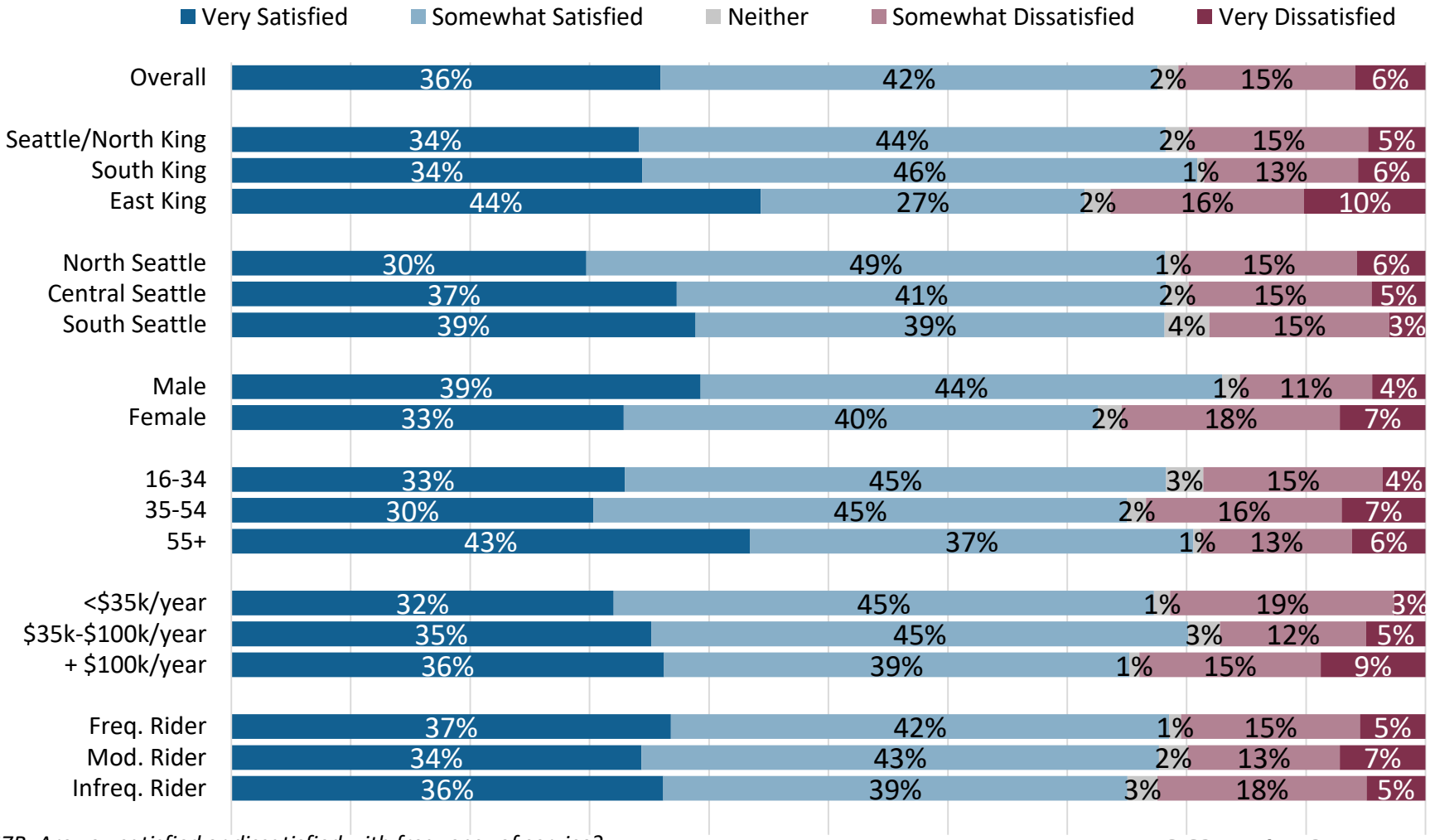


M7A. Are you satisfied or dissatisfied with on-time performance?

Frequency of Service

[Improvement Priority]

About one-in-five riders are dissatisfied with service frequency. East County residents are particularly polarized on this element: despite giving the highest "very satisfied" ratings of any major subgroup, they have also gave the highest "dissatisfied" ratings. As one of the most critical improvement priorities in the survey, improving satisfaction with service frequency could be a big driver for overall satisfaction with Metro. However, the additional funding and structural changes required likely make these improvements less feasible in the near-term.

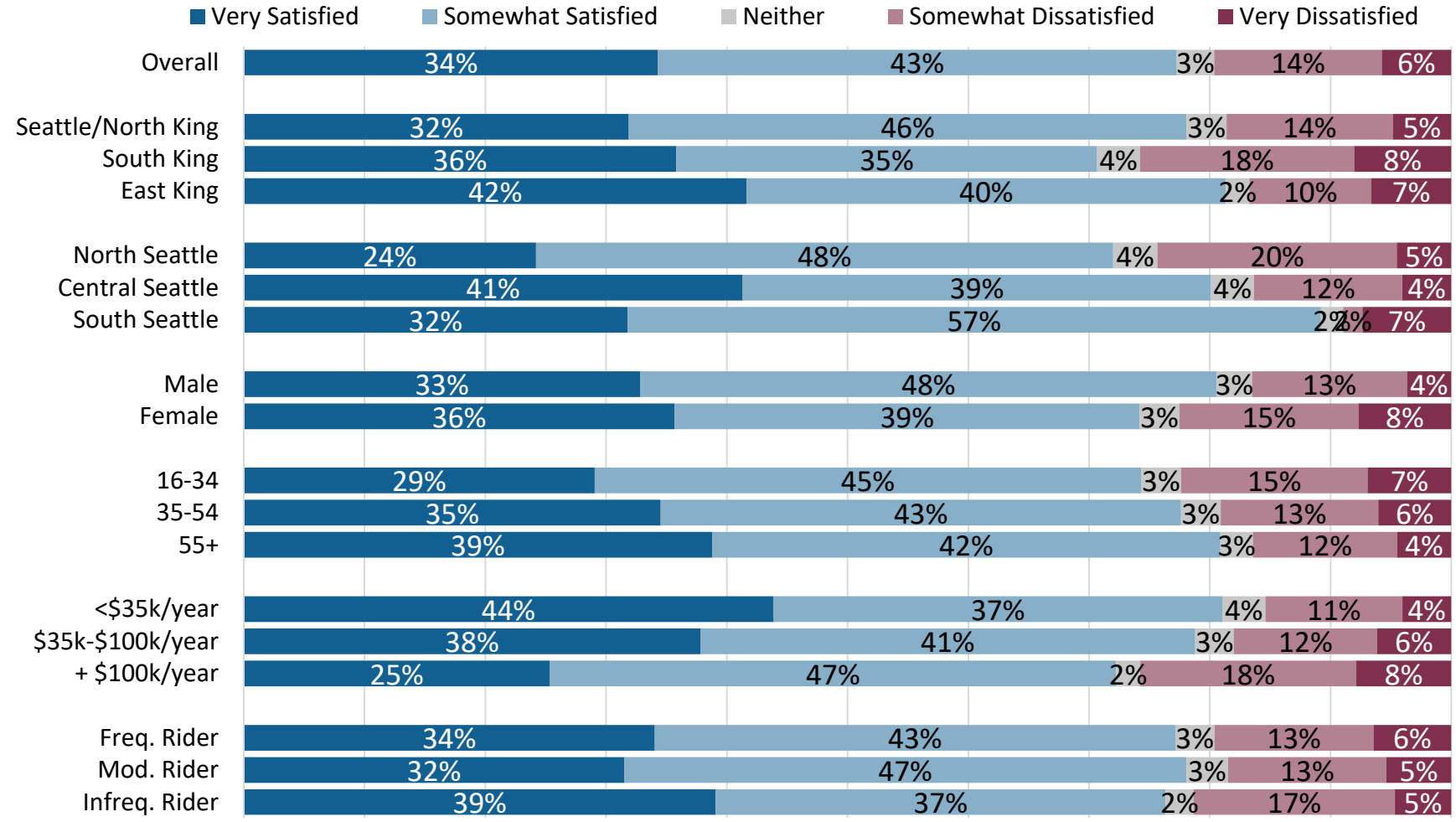


M7B. Are you satisfied or dissatisfied with frequency of service?

Travel Time

[Strategically Target]

While most riders are generally satisfied with the time it takes to travel on Metro buses, one-in-five are also dissatisfied with this attribute. General dissatisfaction is highest among riders living in South King and North Seattle. Higher-income riders are also less satisfied with this attribute than other rider subgroups. While technically a strategic target, travel time is a borderline improvement priority as satisfaction is currently underperforming its relative importance level. If some practical improvements can be made to increase travel time satisfaction – particularly in South King and North Seattle – they could help boost riders' satisfaction with Metro while also reducing one of the key perceived advantages of driving over transit.

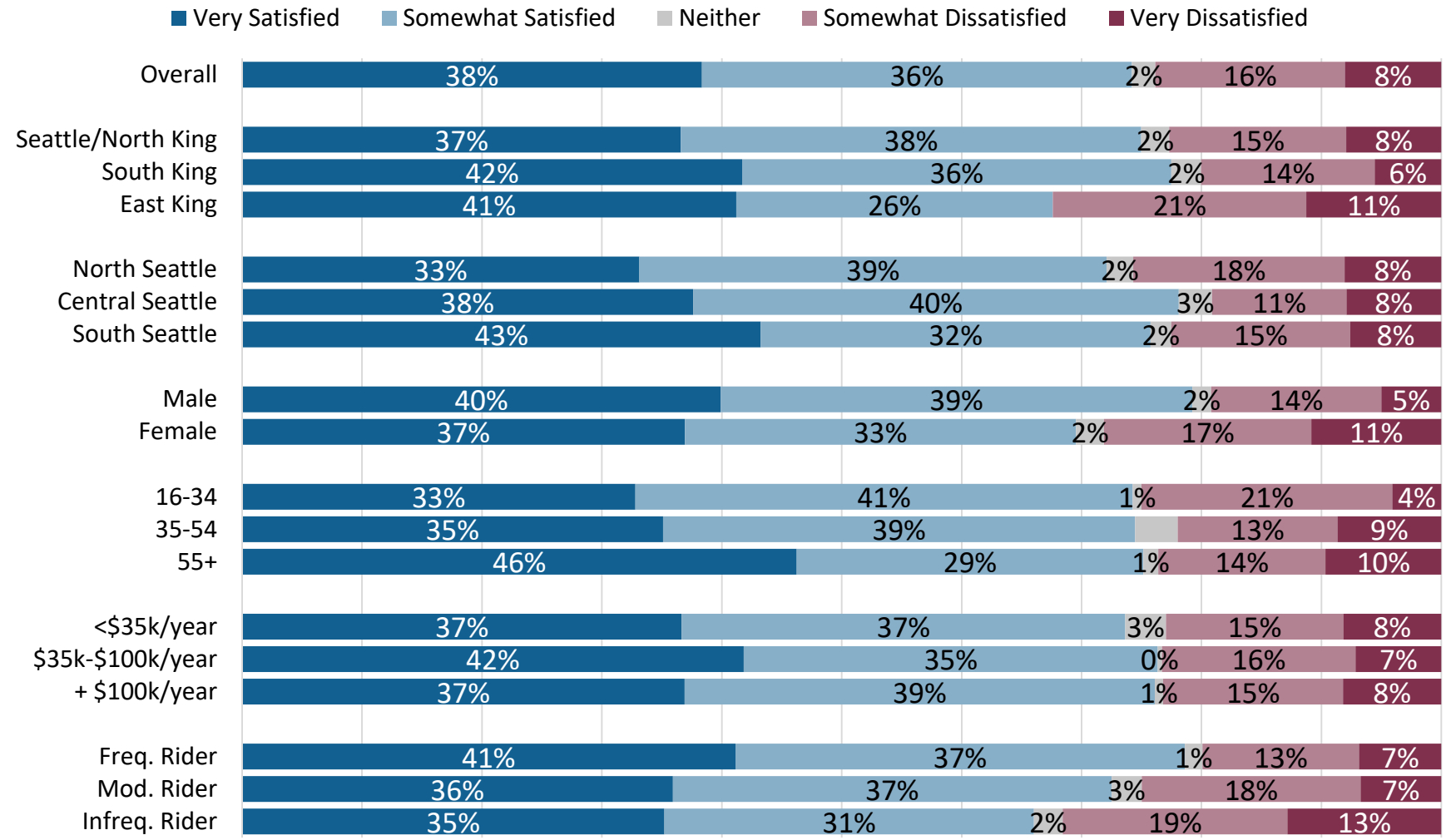


M7E. Are you satisfied or dissatisfied with amount of time it takes to travel?

Availability of Service by Subgroup

[Strategically Target]

Satisfaction ratings with the availability of service are middling across most rider subgroups as nearly a quarter of riders are dissatisfied, overall. Riders in East King and infrequent riders are less satisfied with this element than other rider groups. Although expanding the system would mean a lot to many riders (including current and potential new riders), the required funding and resources likely make this less fruitful than easier-to-implement efforts to improve on-time performance and travel time.

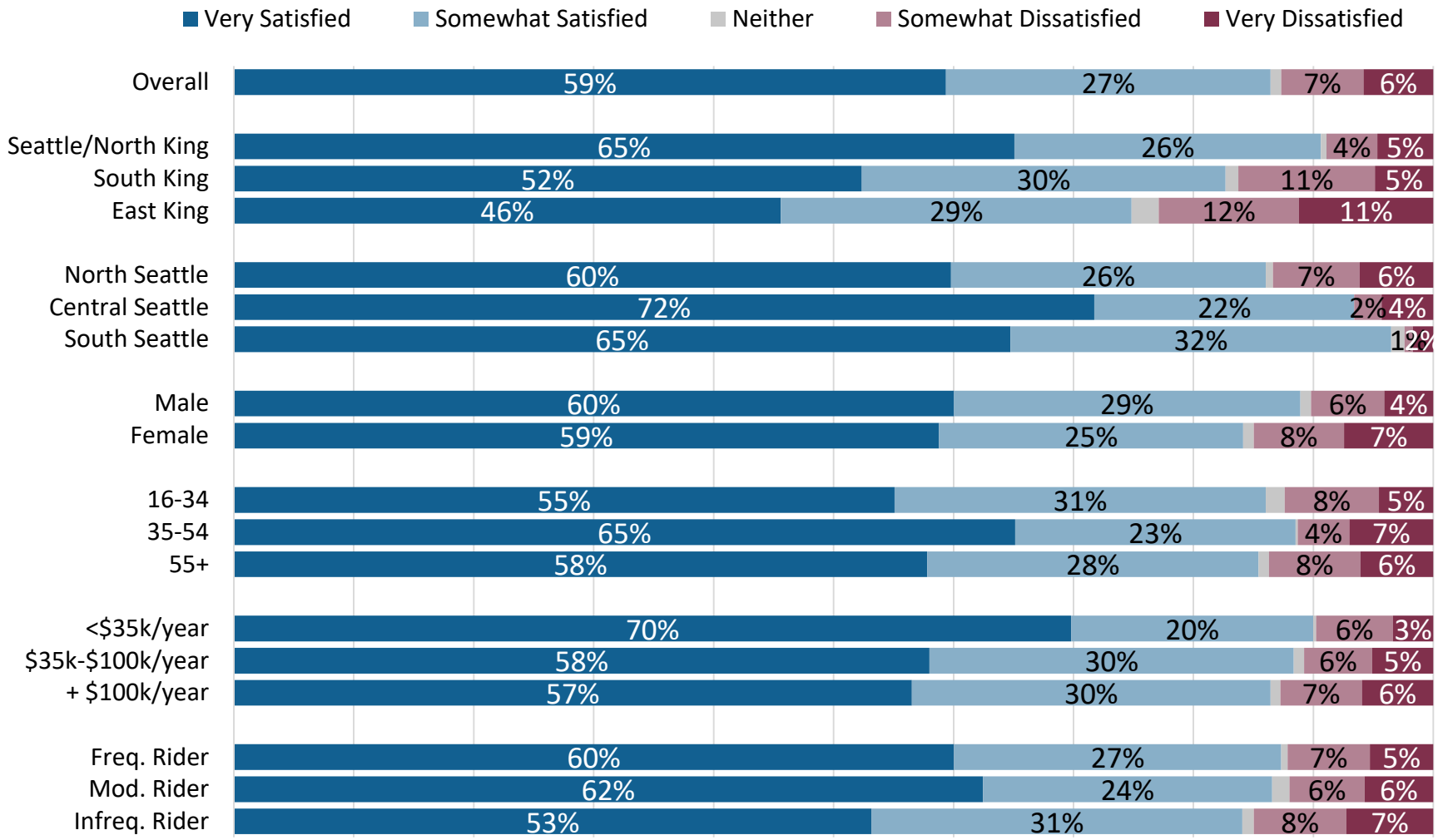


M7C. Are you satisfied or dissatisfied with availability of service where you need to travel?

Distance to Stop

[Monitor]

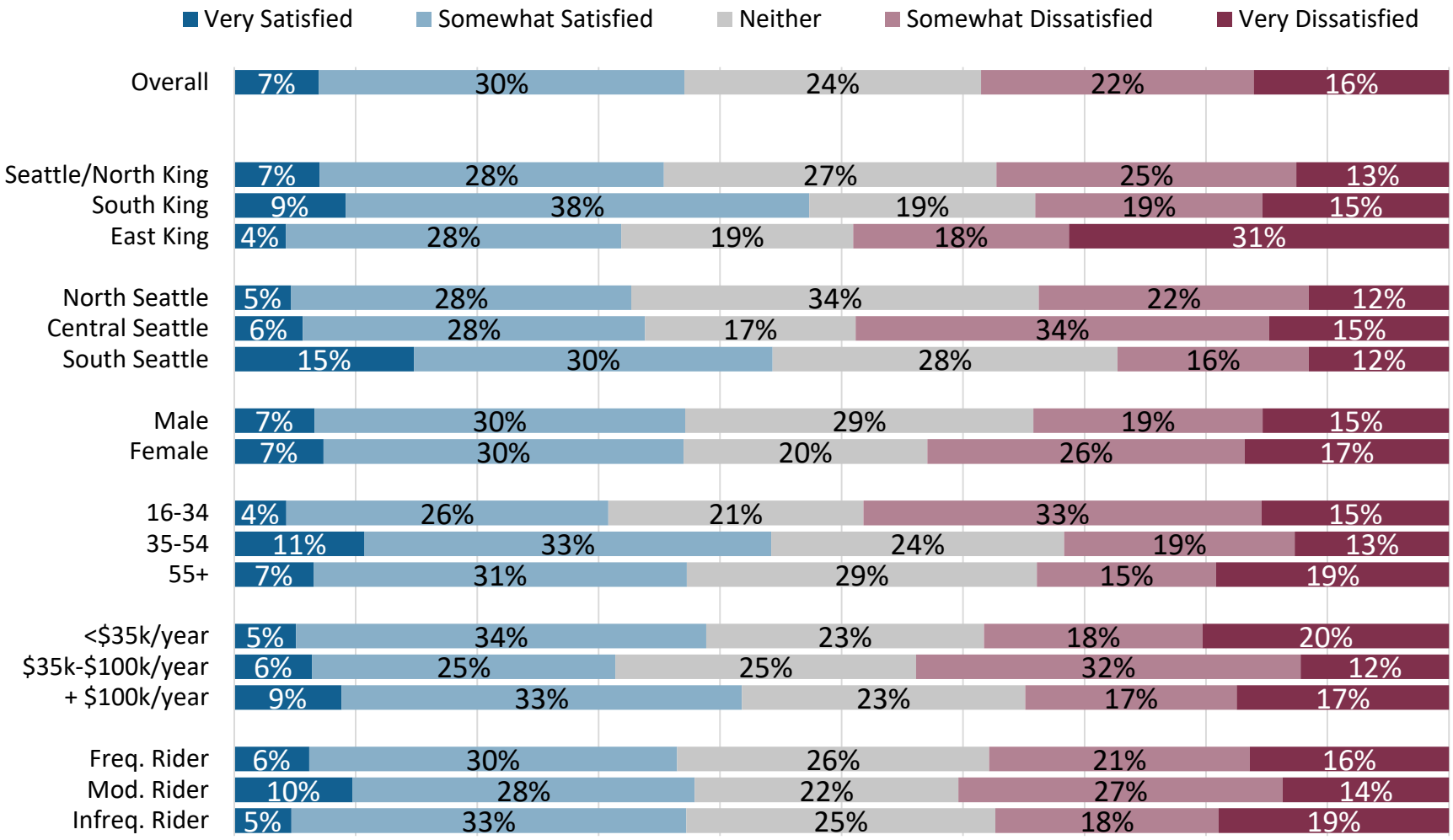
East King riders are the least satisfied with the distance between home and the bus stop of any major subgroup. Although some East King riders would appreciate improved accessibility, these efforts may ultimately require more difficult-to-implement service expansions while adding more stops may also be at odds with efforts to improve travel time, which is generally a more important area of focus for most riders.



MU. Are you satisfied or dissatisfied with the distance from home to the bus stop?

Frequency of Service After 10pm

*Satisfaction with late-night service frequency is relatively low across all rider subgroups and is lowest among younger 16-34 riders, East King and Central Seattle riders. Increasing night-time bus frequency is likely to drive up satisfaction for service frequency, as a whole. *Note: Respondents were only asked to rate this element if they were less than "very satisfied" with general service frequency, resulting in inherently lower ratings for this aspect of the service.*



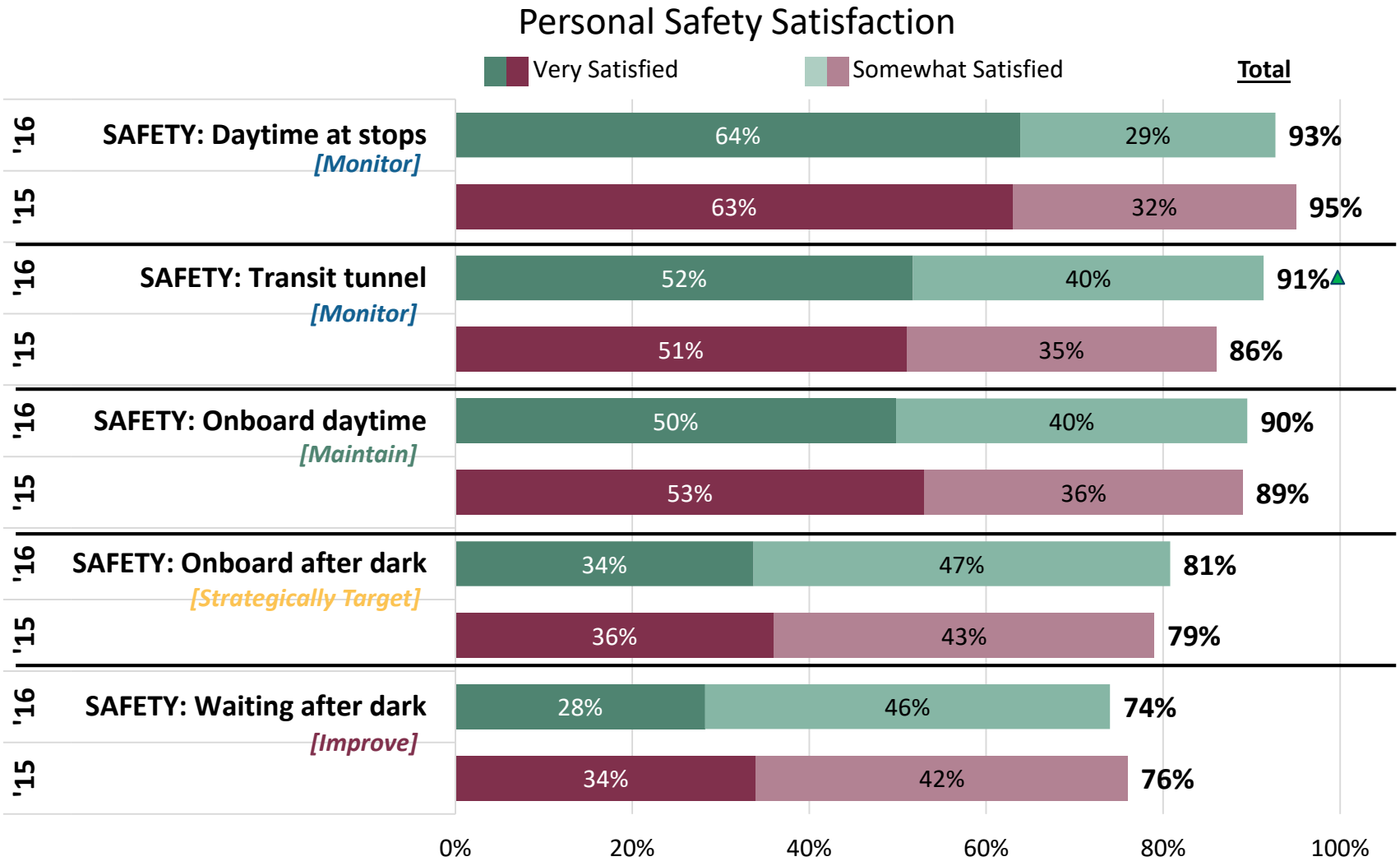
M7B_5. Are you satisfied or dissatisfied with frequency of service after 10pm?

King County METRO

Personal Safety Satisfaction

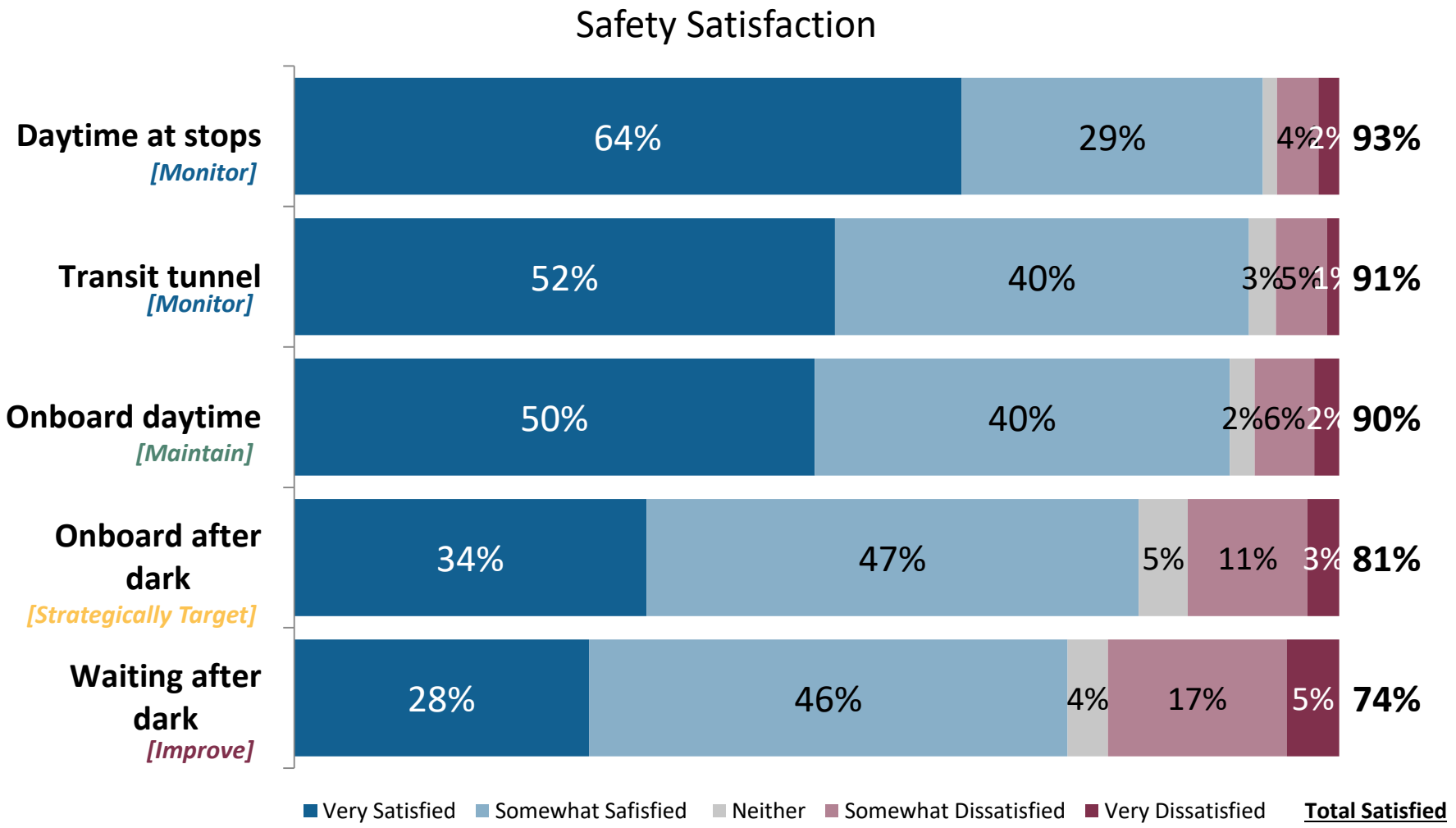
Personal Safety Satisfaction – Year-to-Year

The positive intensity of the personal safety element ratings are largely unchanged from 2015. "Very satisfied" ratings have dropped a few points for "Waiting after dark," while overall satisfaction has remained on-par. Overall satisfaction with safety in the Downtown transit tunnel is up from last year.

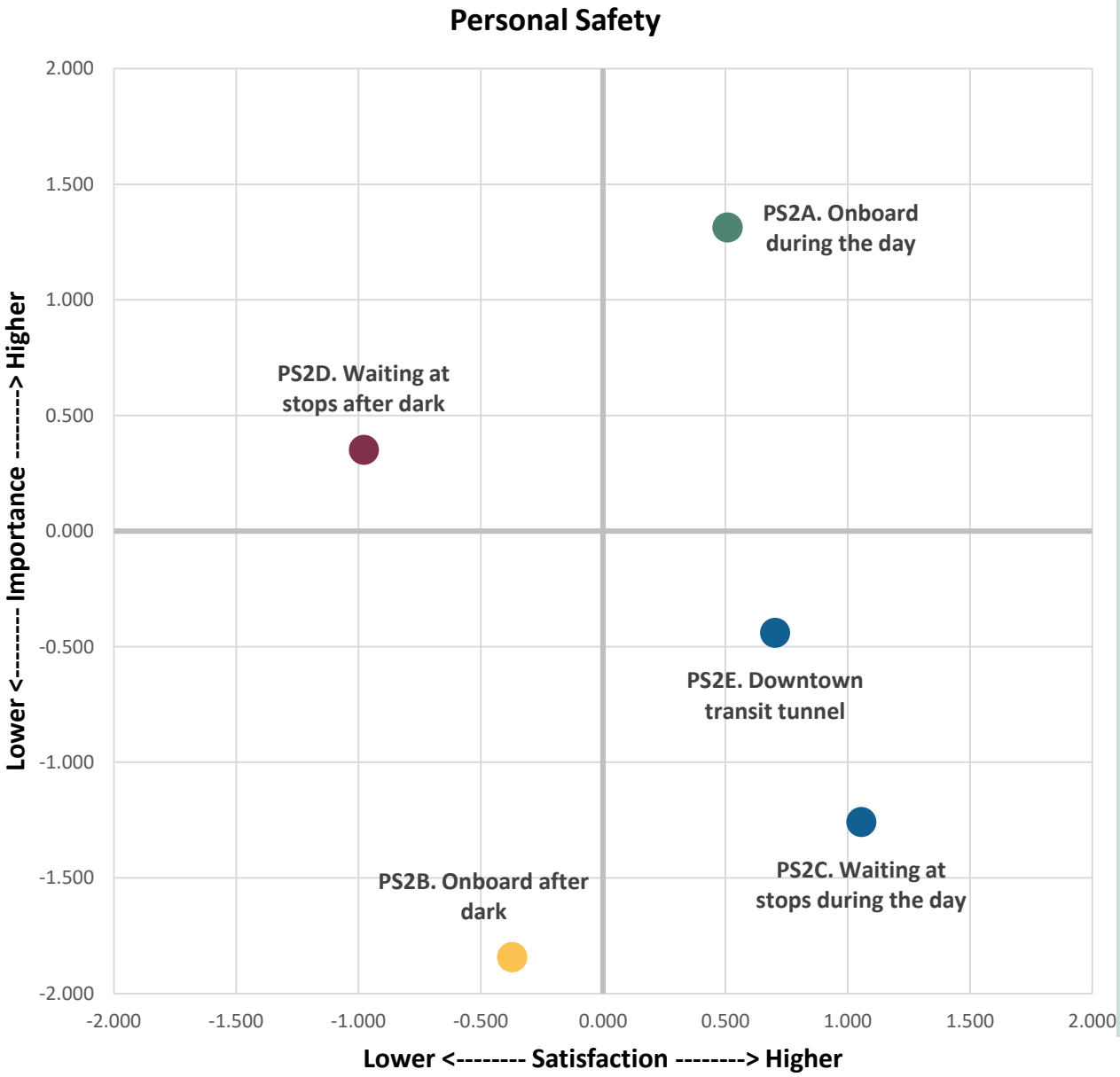


Safety Satisfaction – Full Ratings

Dissatisfaction is minimal for daytime and Downtown transit tunnel safety but riders are less satisfied with both of the "after dark" safety elements. As a key improvement priority with relatively low ratings, night-time stop/safety will be an important area of focus in the short term. Daytime on-board safety is another critical attribute required for Metro to maintain high levels of satisfaction, overall.



Key Drivers: Personal Safety



*Of the personal safety drivers, **night-time stop safety** is the key safety improvement area for Metro to focus on in the near-term. As another underperforming element, **on-board safety after dark** is a notable strategic target, although it has a lower impact on most riders' satisfaction than other safety elements.*

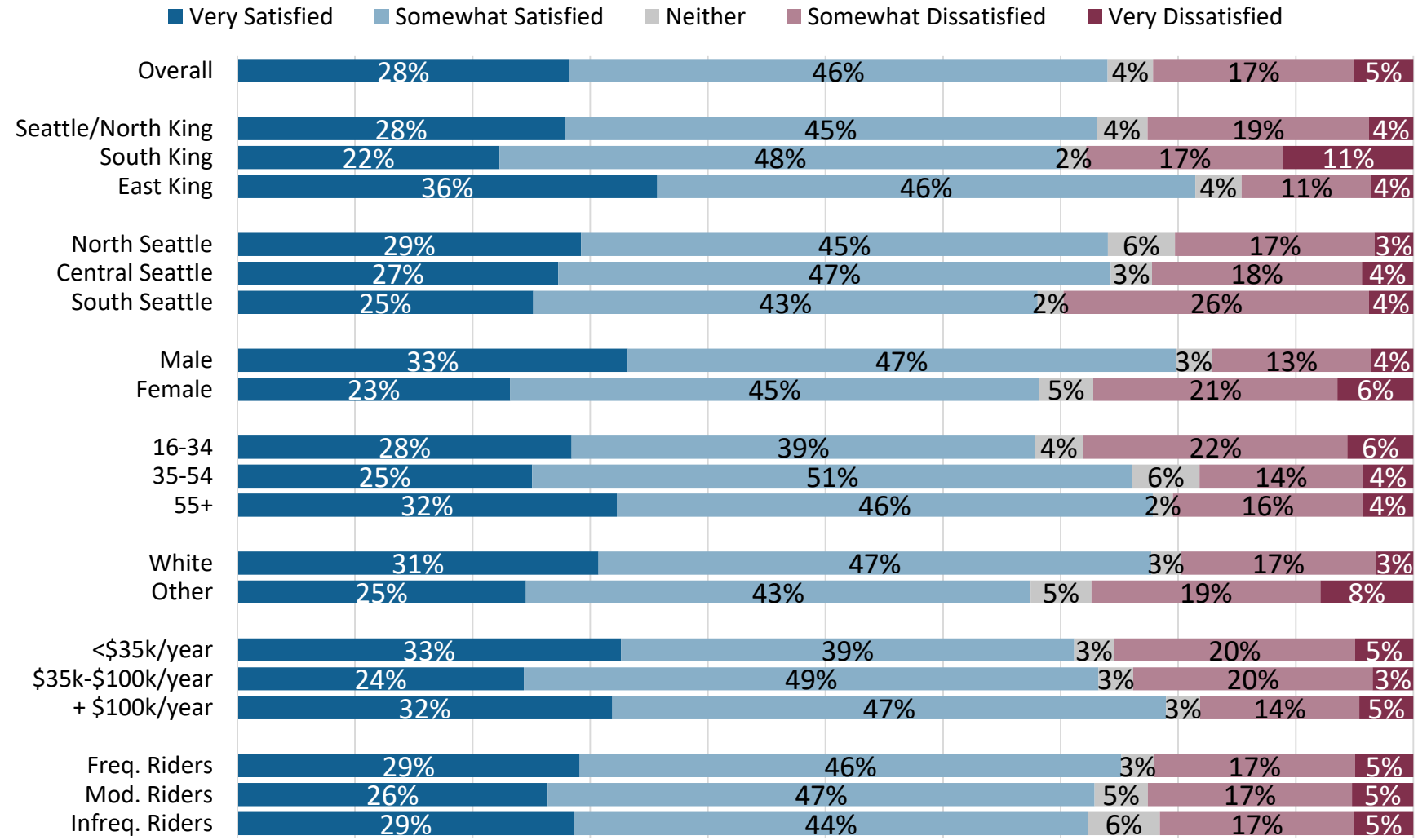
*Riders are largely satisfied with **on-board safety during the day** and they also view it as one of the most important attributes. Metro should consider this a key maintenance area as it is an important element that could have potentially negative impacts on overall agency satisfaction if it were to slip.*

***Safety at stops during the day** and in the **Downtown Seattle transit tunnel** are highly-rated but are also a less critical driver of Metro's overall rating. They should be monitored as needed but neither needs to be high-priority area of focus.*

Safety Waiting After Dark

[Improvement Priority]

About one-in-five riders are dissatisfied with their safety while waiting for the bus after dark. Riders in South King, South Seattle, women, minority and younger riders show the highest concern for this element and it could be a potential detriment for overall satisfaction if it gets worse. Stops and stations in South King should be key areas of focus, where one-in-ten riders are "very dissatisfied" with their safety waiting for buses in this area.

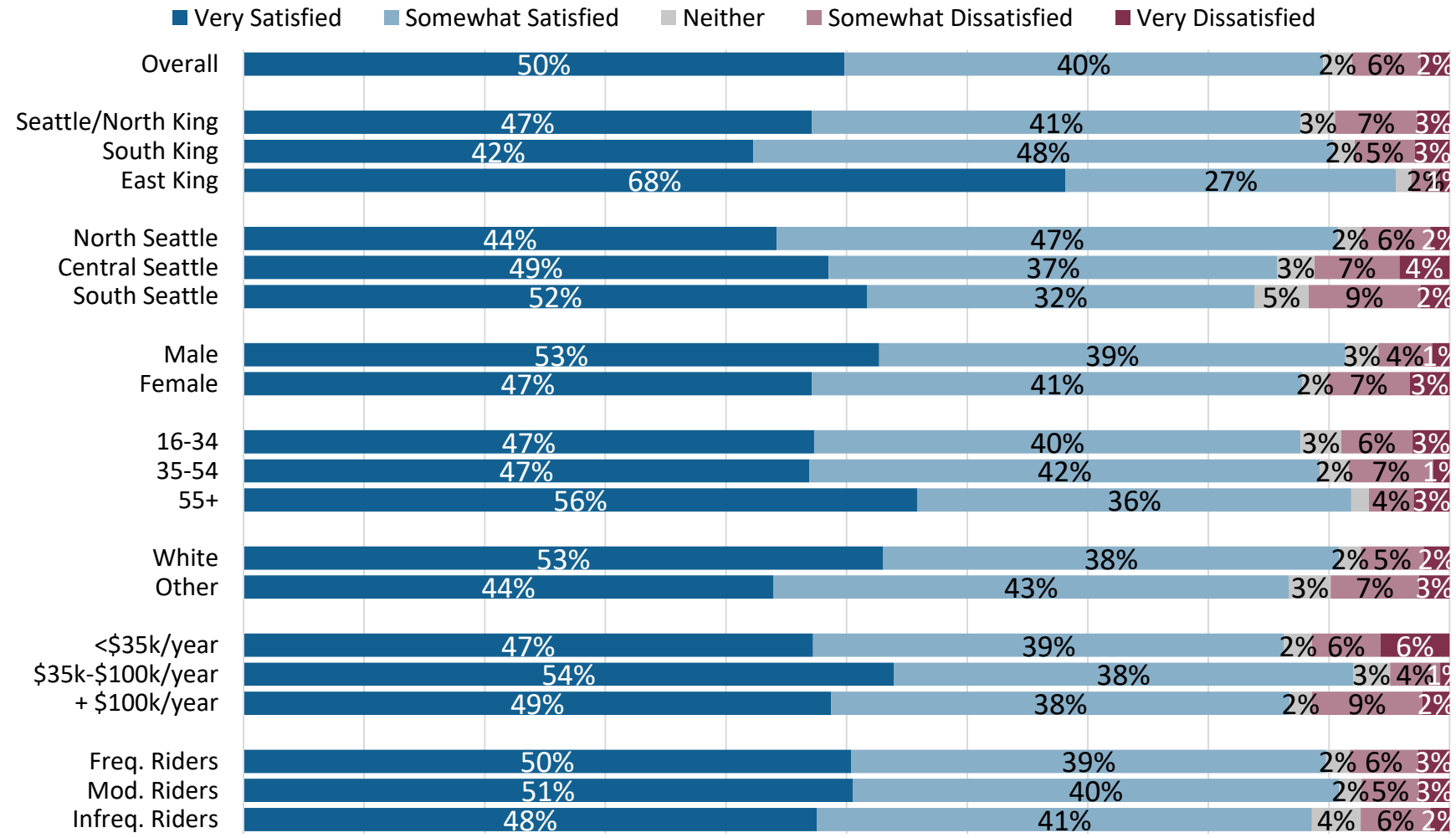


*PS2D. Are you satisfied or dissatisfied with personal safety waiting for the bus **after dark**? (n=708)*

Safety Onboard During Daytime

[Maintain]

Riders are generally satisfied with on-board safety during the daytime, with notably little dissatisfaction. East King riders are the most content with this attribute, as two-thirds are "very satisfied." Despite low dissatisfaction across the board, this is considered one of the most important overall attributes and may require maintenance efforts – particularly in Central and South Seattle and South King -- to ensure dissatisfaction levels remain low going forward.

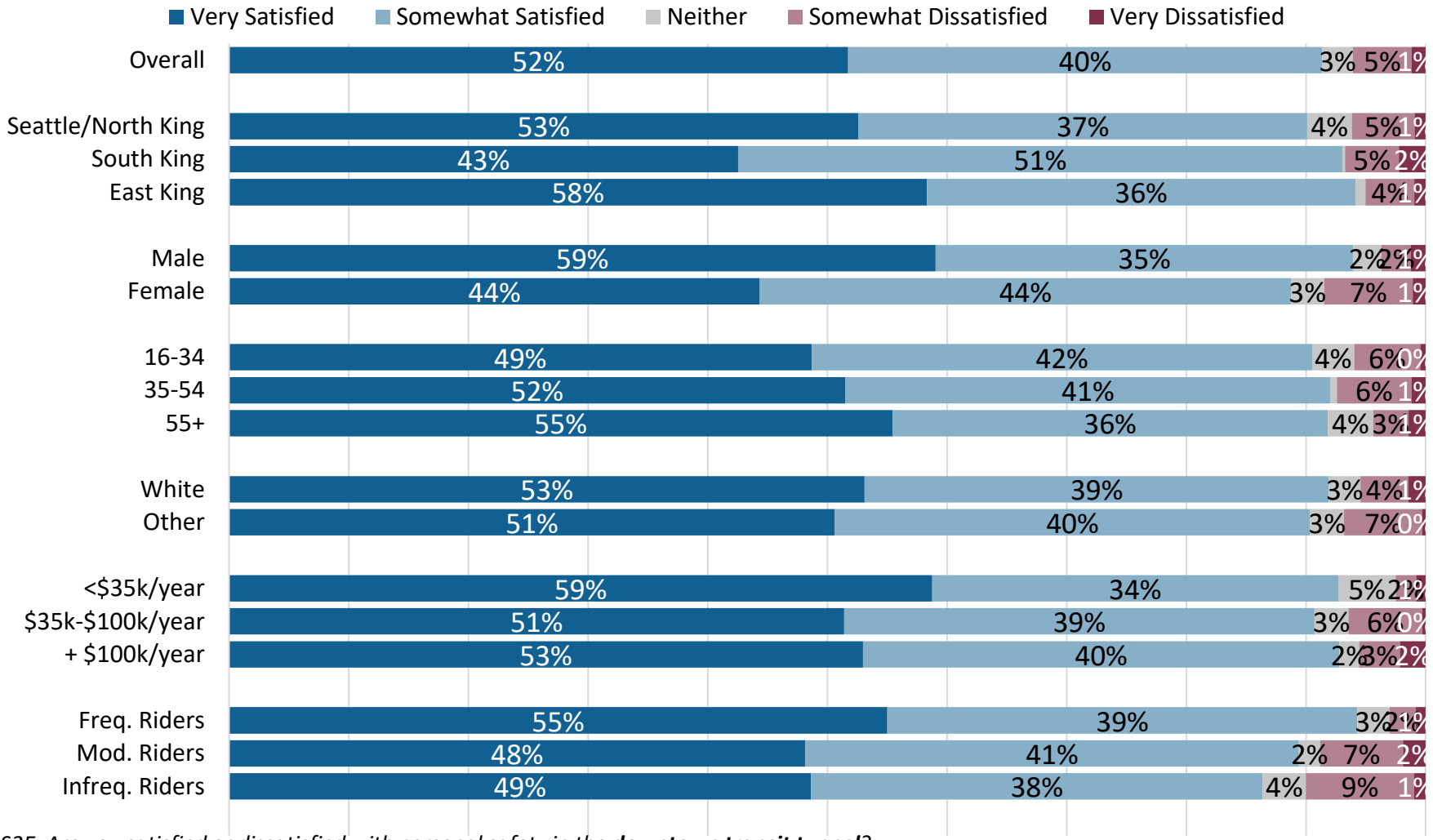


*PS2A. Are you satisfied or dissatisfied with personal safety on the bus related to the conduct of others during the **daytime?***

Safety in Downtown Transit Tunnel

[Monitor]

Riders are not particularly dissatisfied with the safety of the Downtown Transit Tunnel, though satisfaction intensity ("Very Satisfied") is lower among women and South King riders. Safety in the tunnel is not necessarily prohibitive for these riders as it is a relatively lower priority safety element but it is worth monitoring going forward to ensure dissatisfaction levels stay low.

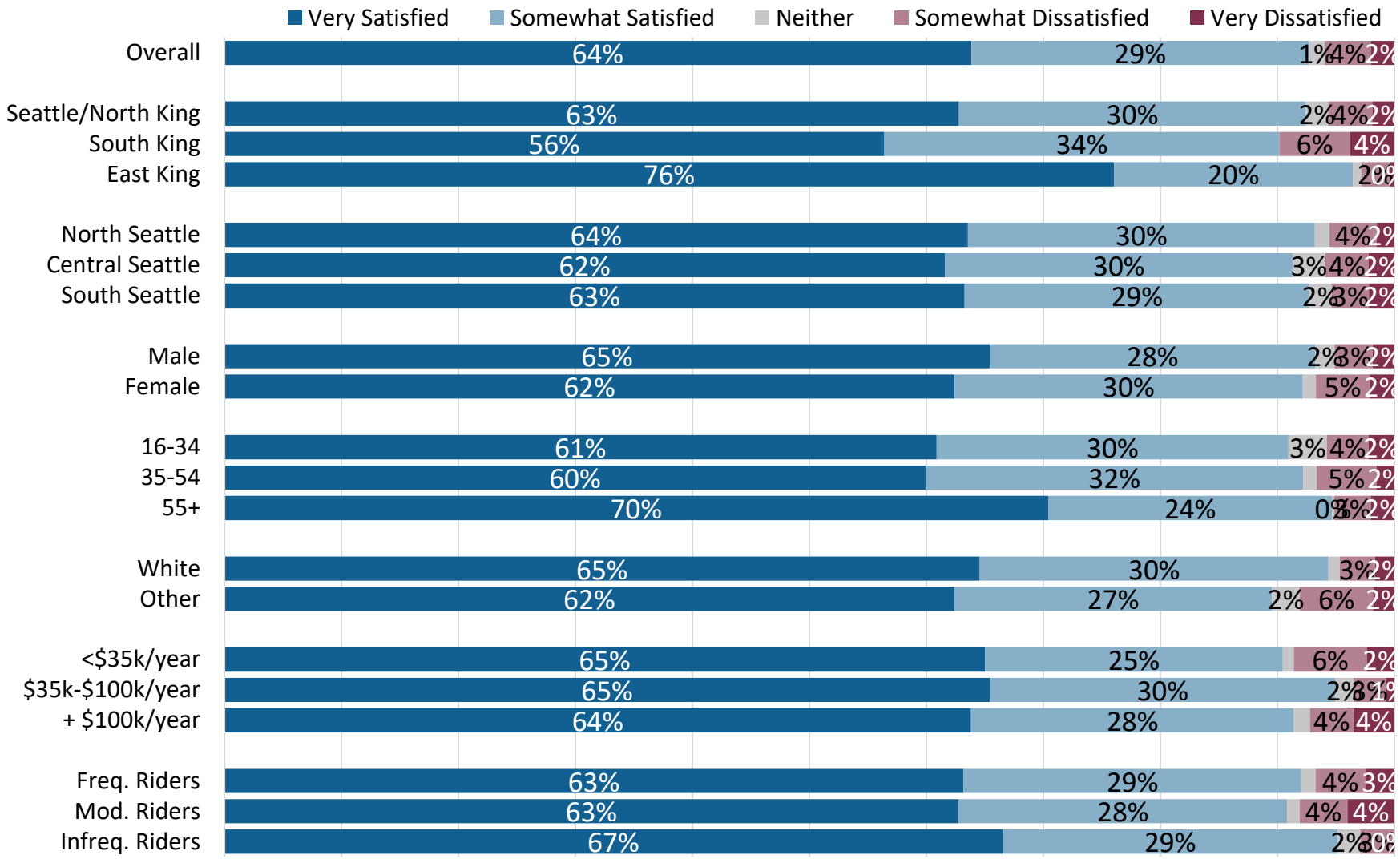


*PS2E. Are you satisfied or dissatisfied with personal safety in the **downtown transit tunnel**?*
(n=632)

Safety Waiting During Daytime

[Monitor]

Daytime safety at stops is not considered an issue for most riders, neither is it a particularly high priority for most riders but is worth monitoring as this could change if riders become less satisfied with this element in the future.

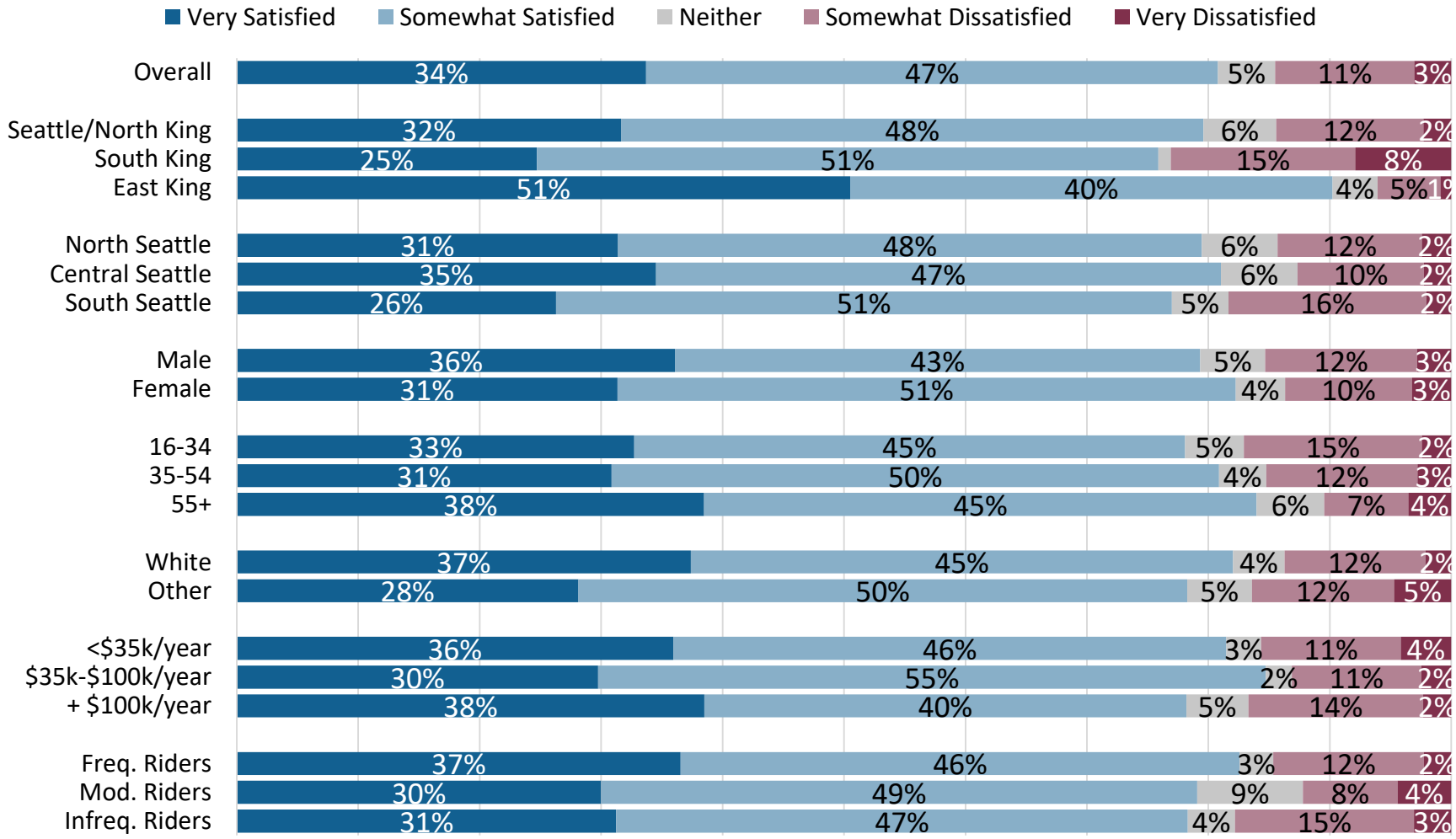


*PS2C. Are you satisfied or dissatisfied with personal safety waiting for the bus in the **daytime?***

Safety Onboard After Dark

[Strategically Target]

Most dissatisfaction with on-board safety after dark related to the conduct of others is not strong but South King and South Seattle riders are generally less satisfied with this element than riders in other areas. While this is a less important element for the large portion of riders who do not ride Metro at night, improvements could be targeted to South King – where nearly one-in-ten riders are "very dissatisfied" with safety on the bus after dark.



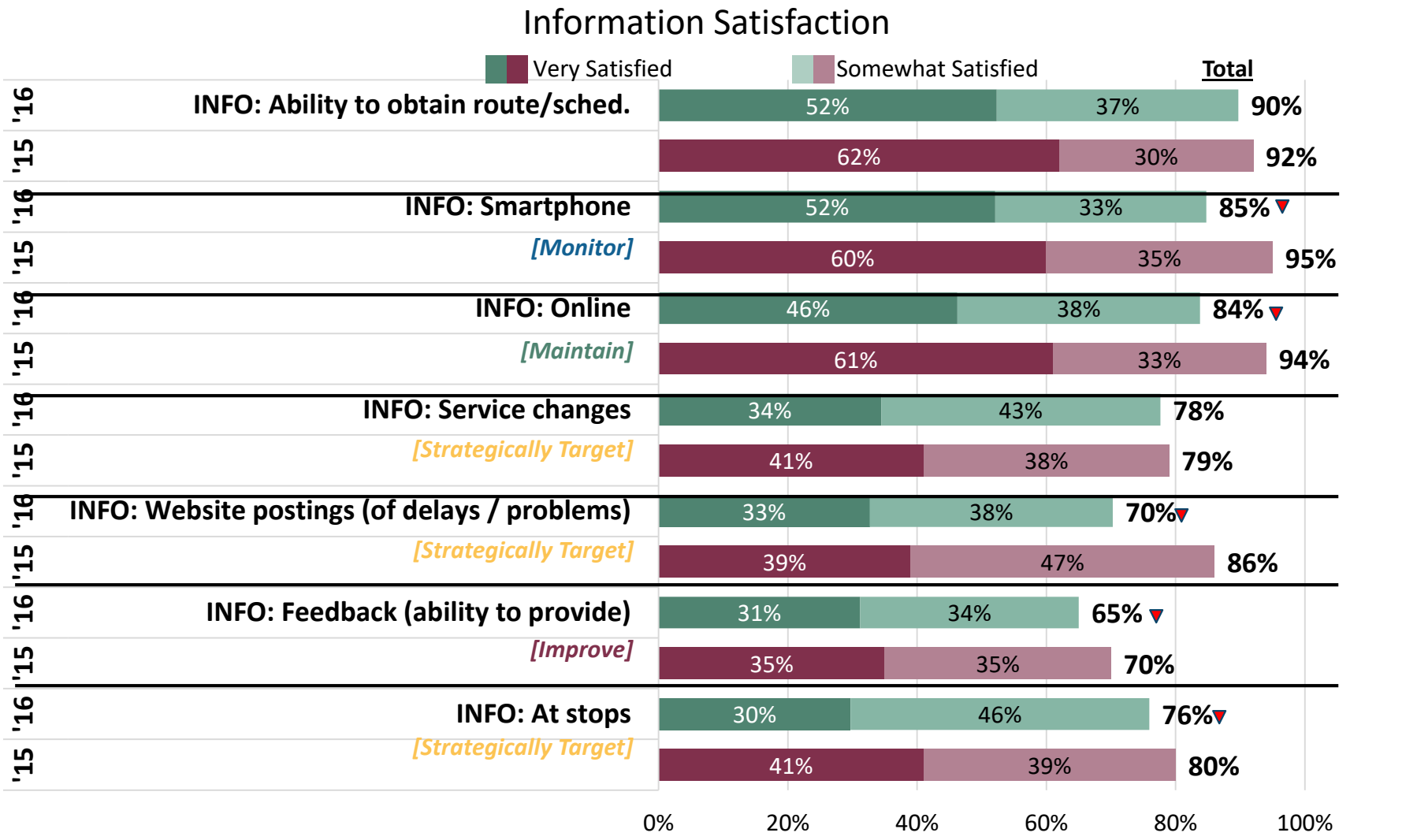
*PS2B. Are you satisfied or dissatisfied with personal safety on the bus related to the conduct of others **after dark**? (n=703)*

King County METRO

Information Satisfaction

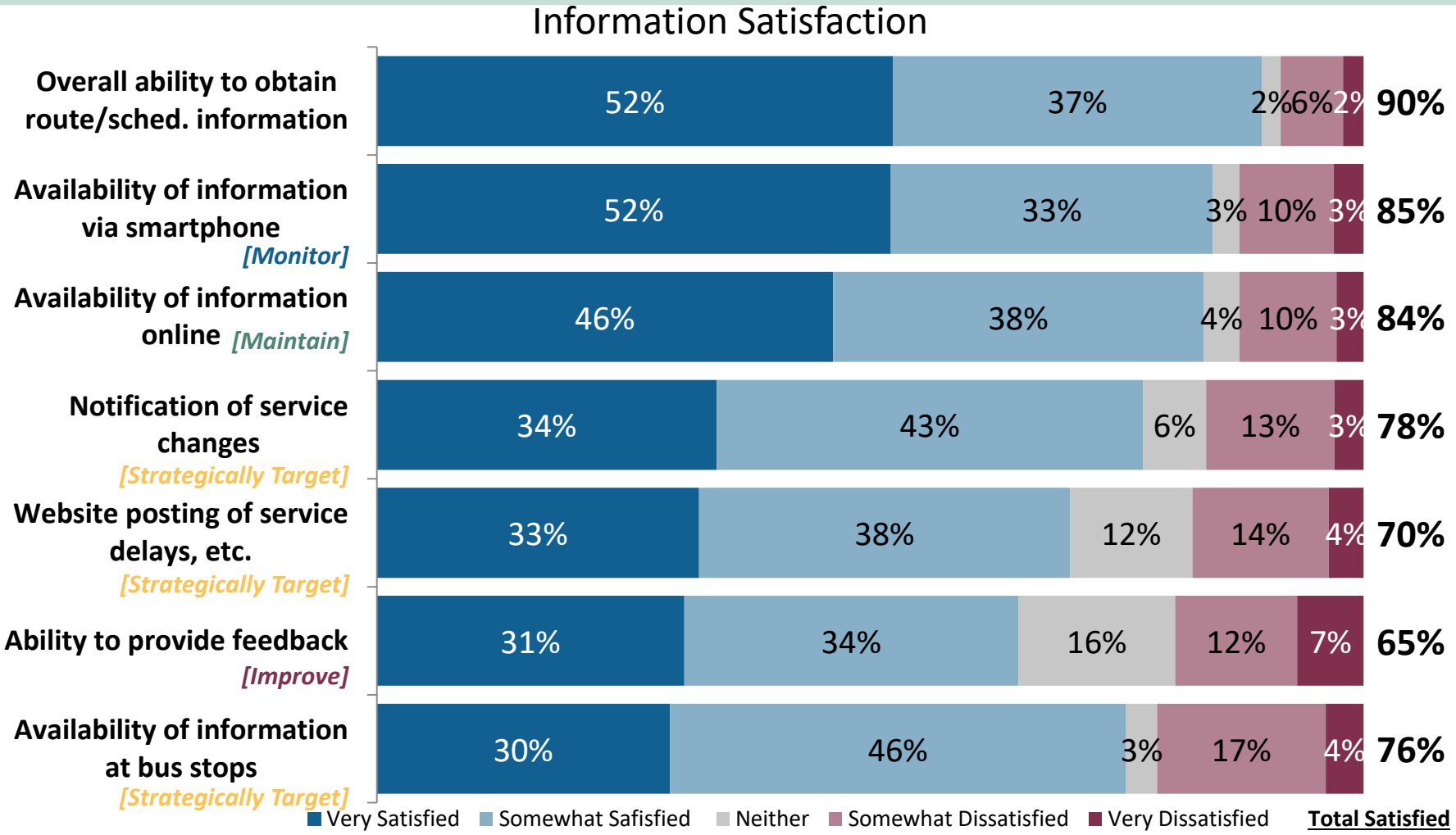
Information Satisfaction – Year-to-Year

The information satisfaction ratings are lower, year-over-year – particularly for Metro Online and smartphones, which have each seen relatively steep declines in satisfaction (-10 points) from 2015. As the key improvement priority within the Information service dimension, the ability to provide feedback has also declined slightly.

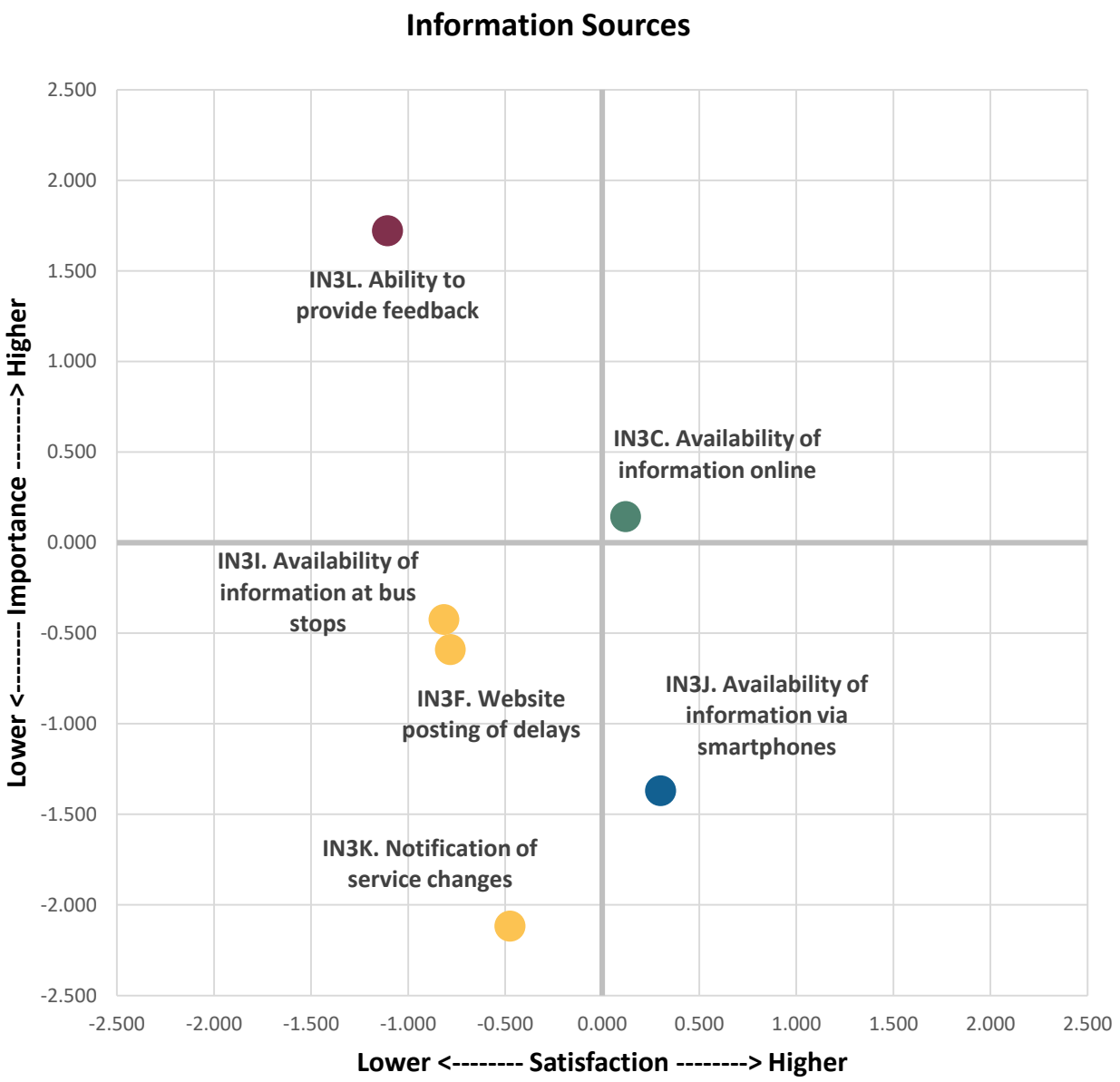


Information Satisfaction – Full Ratings

Of the information-related elements, the ability to provide feedback is the key improvement priority as it has unique value in potentially aiding in more easily identifying and aiding improvement opportunities for various service elements. Additional efforts could be focused on maintaining satisfaction with the availability of information online. Delay postings and the availability of info at bus stops may have additional value as strategic targets but these may have limited impact on broader service satisfaction as they are not frequently applicable to many riders.



Key Drivers: Information Sources



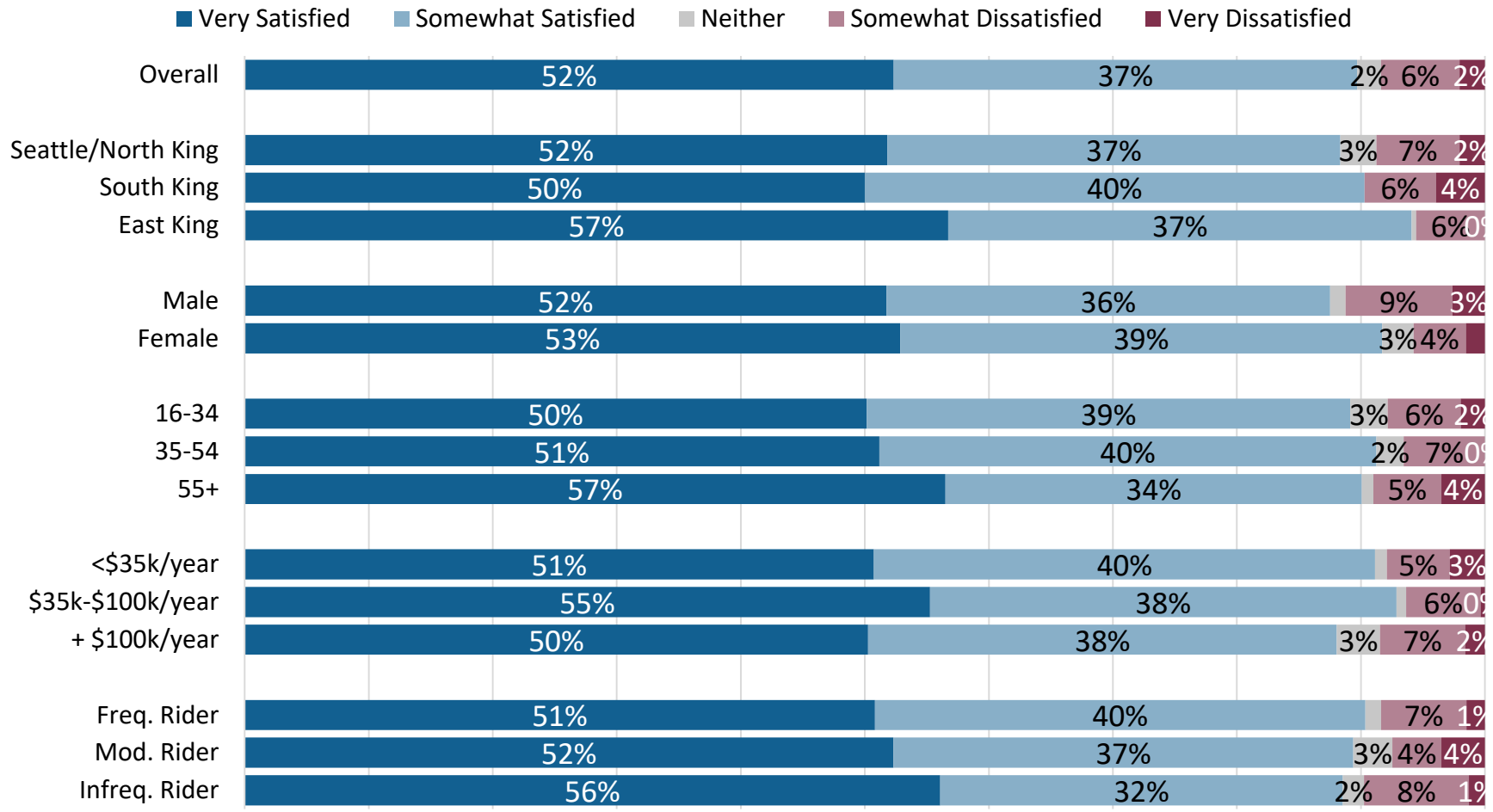
*Among the information-related elements, the **ability for riders to provide feedback such as registering a complaint or commendation** is one of riders' biggest priorities for improvement. This is both the most important and lowest-rated element among the information-related items.*

*Although the **availability of information online**, the **availability of info at stops** and **online delay postings** are not strictly improvement priorities, they are relatively low-rated and could easily be considered borderline areas of focus.*

*The **availability of information via smartphones** and **notifications of service changes** are generally the least-important satisfaction drivers in the Information service dimension.*

Ability to Obtain Route & Schedule Information

While riders' "very satisfied" ratings for their overall ability to get route and schedule information is lower than in 2016 (-10%; 62%→52%), it has not translated into particularly negative ratings. Element ratings are still largely positive but intensity has diminished. More specific variations of this element (info via Metro online, smartphones and stops) are discussed in greater detail later in this section.



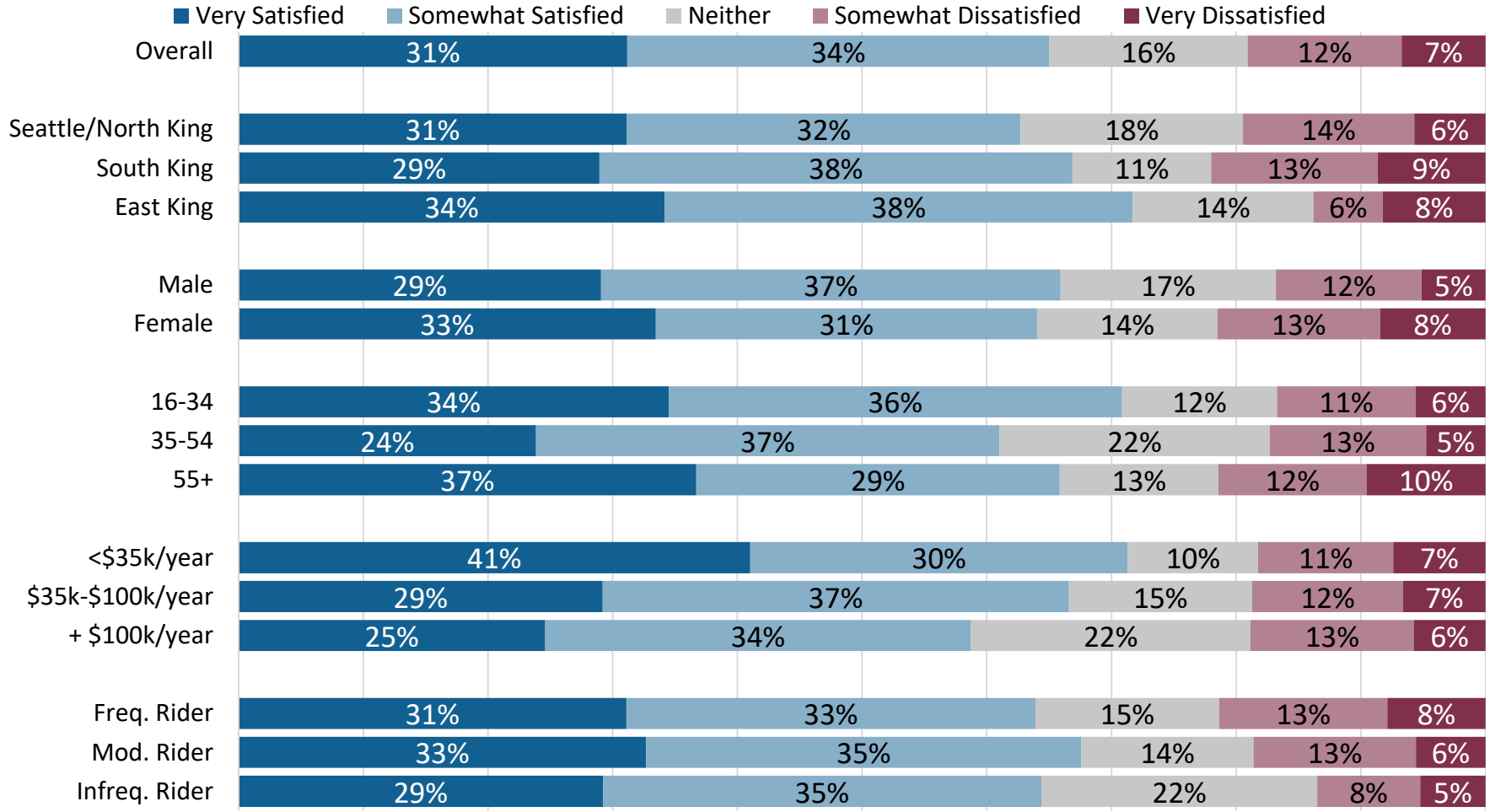
Note: To reduce the overlap from similar items being tested, the broader ability to maintain information element was excluded from the Key Drivers Analysis since info via smartphone, online and at stops were each tested as individual, more actionable items.

IN3A. Are you satisfied or dissatisfied with the overall ability to get information about Metro's routes and schedules?

Ability to Give Feedback by Subgroup

[Improvement Priority]

While riders' satisfaction with the ability to give feedback is lower than other information-related attributes, it also has the highest level of neutral ratings, with nearly one-in-five saying they're "neither satisfied nor dissatisfied" with the element. However, the relatively strong negative intensity and high importance of this attribute make it among the more urgent – yet potentially easier to implement -- priorities to address. Improving Metro's feedback system may also have unique spill-over effects towards improving other service elements by helping Metro more easily identify and address crucial service, safety, information and operator issues as they arise.

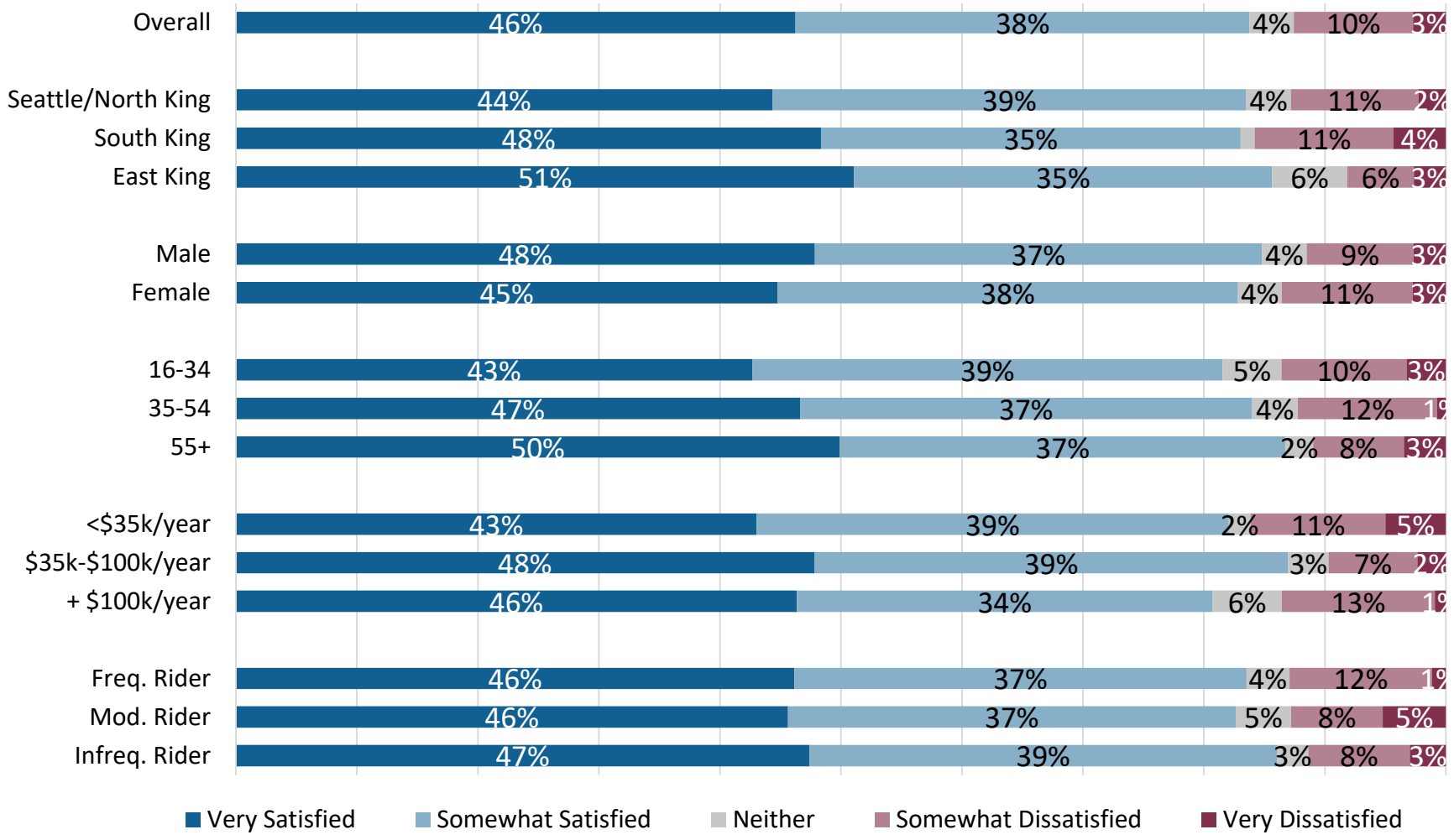


IN3L. Are you satisfied or dissatisfied with the ability to provide feedback such as registering a complaint or commendation?

Availability of Information Online

[Maintain]

Satisfaction with the ability to get service information from Metro's website is comparable across rider subgroups but it is generally lower than in 2015. As a relatively important service attribute, it may require efforts to maintain. This may present opportunities to leverage these efforts with improving riders ability to give feedback (the Information dimension's highest improvement area) where making it easier to submit general service suggestions would also result in capturing more feedback for improving Metro Online.

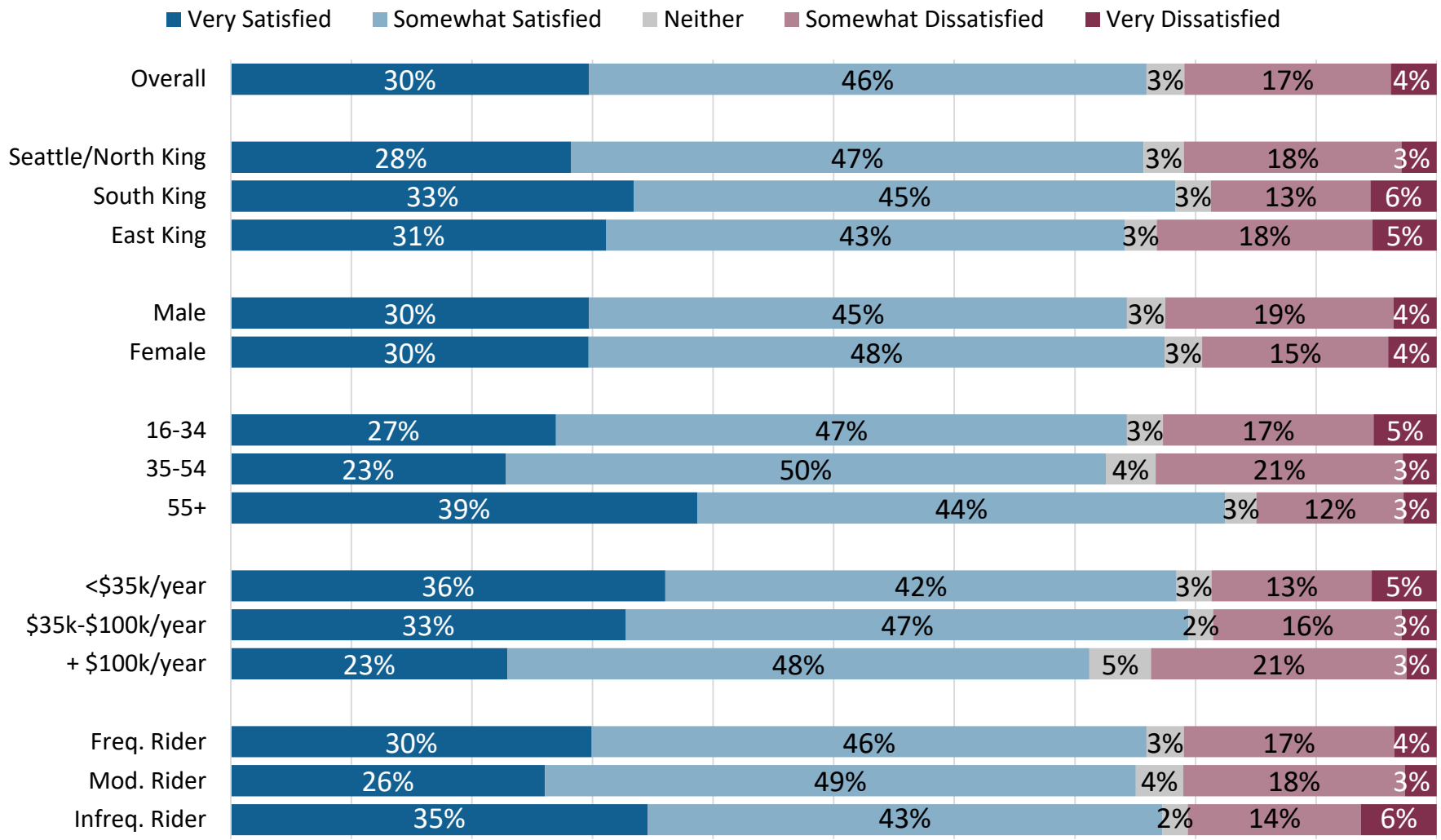


IN3C. Are you satisfied or dissatisfied with the availability of service information on Metro Online?

Availability of Info at Bus Stops

[Strategically Target]

The intensity ratings of info at bus stops are relatively low in either direction but general satisfaction remains lower than other information attributes, which could be due to the lack of posted schedule information at many smaller bus stops. Importance-wise, this element is in the middle of the pack and is generally performing adequately relative to its importance level. Improvements here could help satisfaction among non-smartphone users (18% of riders).

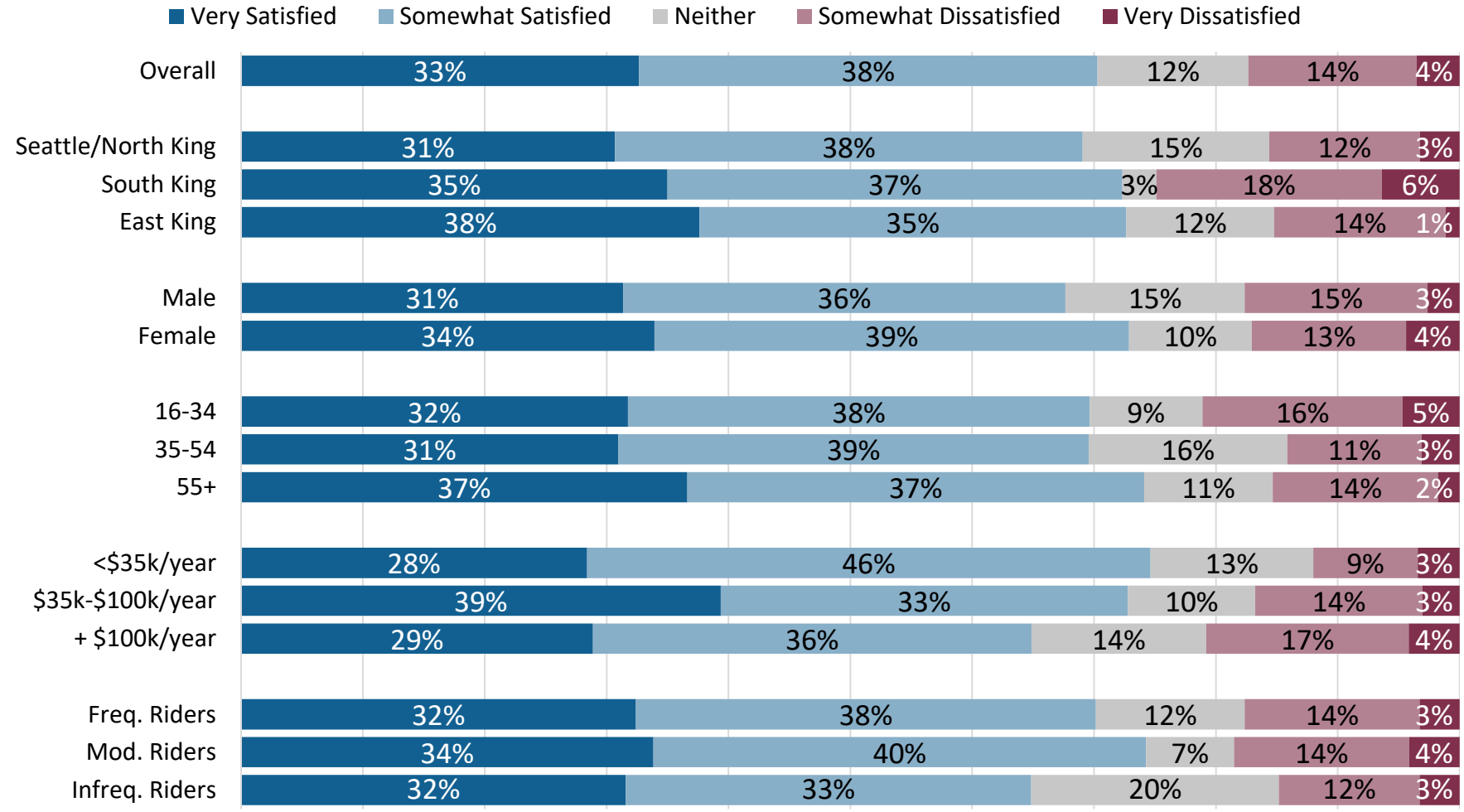


IN3I. Are you satisfied or dissatisfied with the availability of information at bus stops?

Website Posting of Service Delays

[Strategically Target]

South King, 16-34, and higher-income riders express relatively high dissatisfaction with Metro's web postings for service delays/problems but their broader satisfaction remains consistent with other rider subgroups. This service element is not typically applicable for most riders and while satisfaction is not particularly high, it's about as expected for its relative level of importance. Targeted efforts to improve web postings of service delays – particularly for South King routes – could result in nominal (but not major) gains for overall service satisfaction.

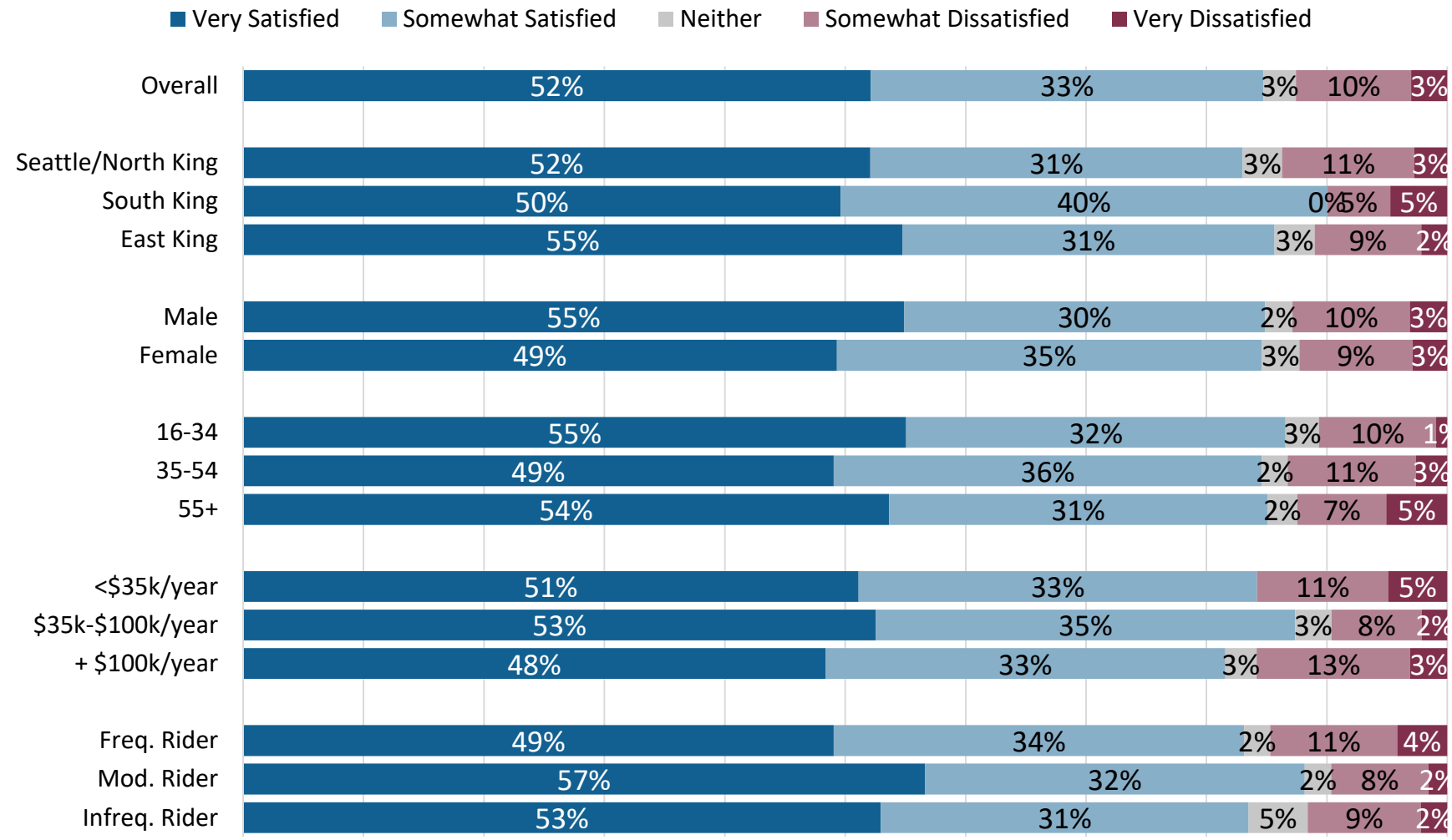


IN3F. Are you satisfied or dissatisfied with the website posting of service delays or other problems?

Availability of Info via Smartphone

[Monitor]

About half of riders are "Very Satisfied" with their ability to get information via smartphone with little fluctuation by rider subgroup. As with Metro Online more generally, riders' satisfaction with getting info via smartphone has dropped from 2015. However, for most riders, smartphone info is less of a focus area than Metro Online, in general.

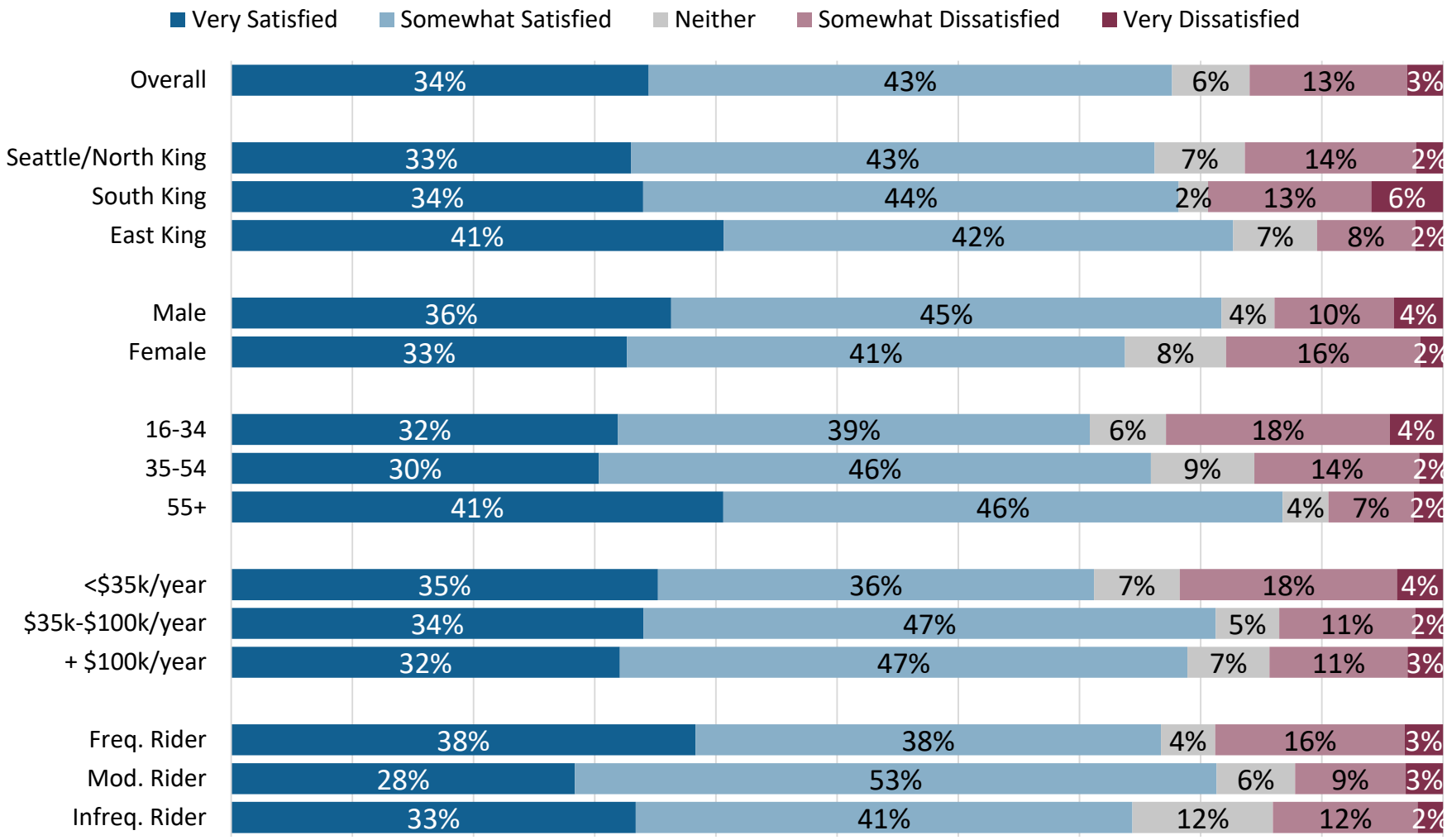


IN3J. Are you satisfied or dissatisfied with the availability of information about Metro via smartphones?

Notification of Service Changes

[Strategically Target]

More than one-in-ten riders are dissatisfied with this attribute but considering the few situations where this element is applicable to the average person, improvement efforts to increase satisfaction with the element – while more convenient for riders during service changes – will ultimately have little impact on driving overall satisfaction for Metro.



IN3K. Are you satisfied or dissatisfied with the notification of service changes?

King County METRO

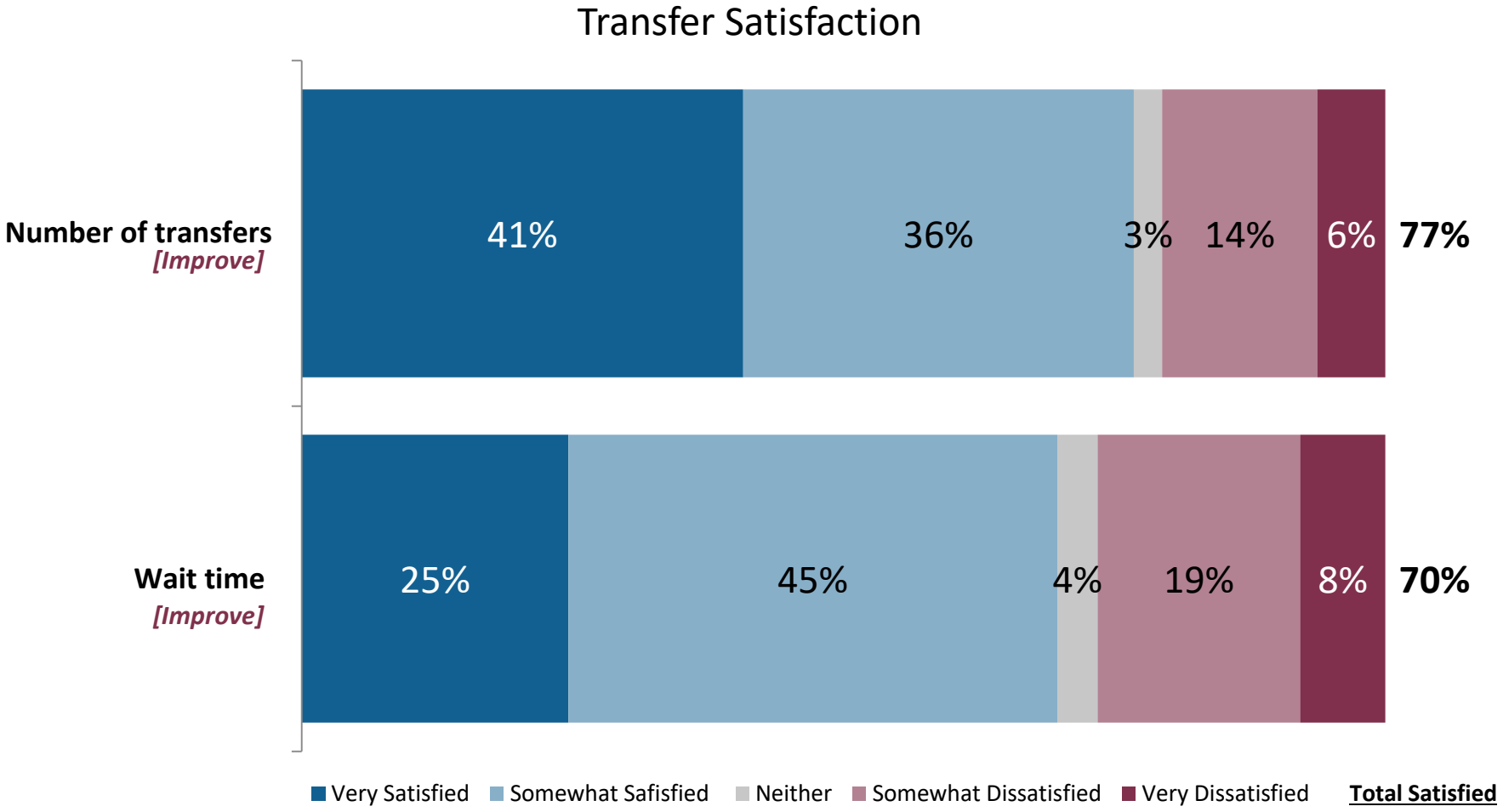
Transfer Satisfaction

Transfer Satisfaction – Year-to-Year

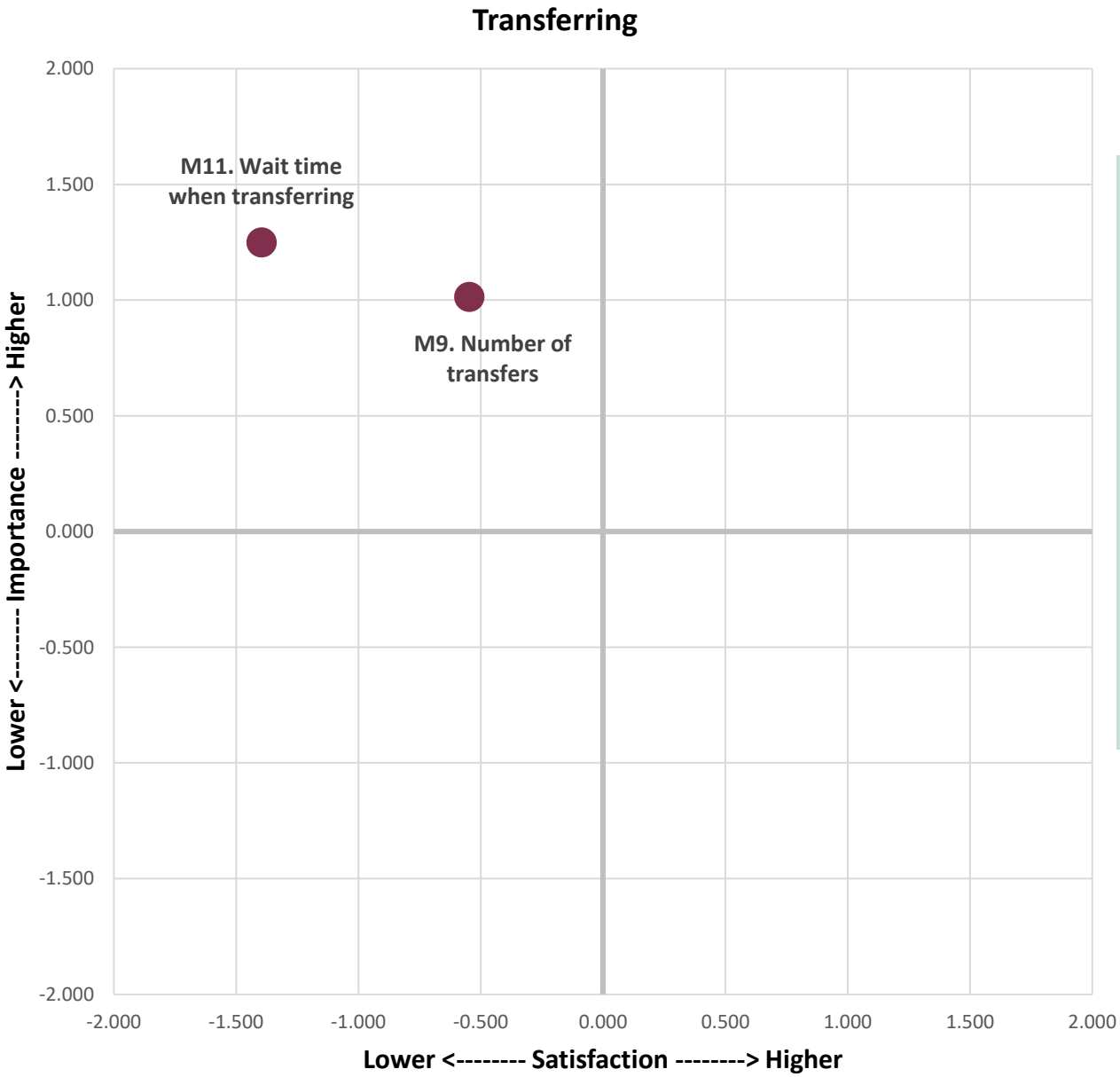
"Very Satisfied" ratings for number of transfer are unchanged from 2015 but wait time ratings are slightly lower in 2016. Both transfer-related elements have been identified as improvement priorities due to their relatively high dissatisfaction levels and relatively high importance for many riders' satisfaction with Metro, overall.

Transfer Satisfaction – Full Ratings

For the half (49%) of riders who make transfers for their usual transit trips, they generally consider the wait time between transfers to be more burdensome than the total number of transfers they have to make. Dissatisfaction is relatively high for both elements as at least one-in-five riders are at least "somewhat dissatisfied" with each.



Key Drivers: Transferring



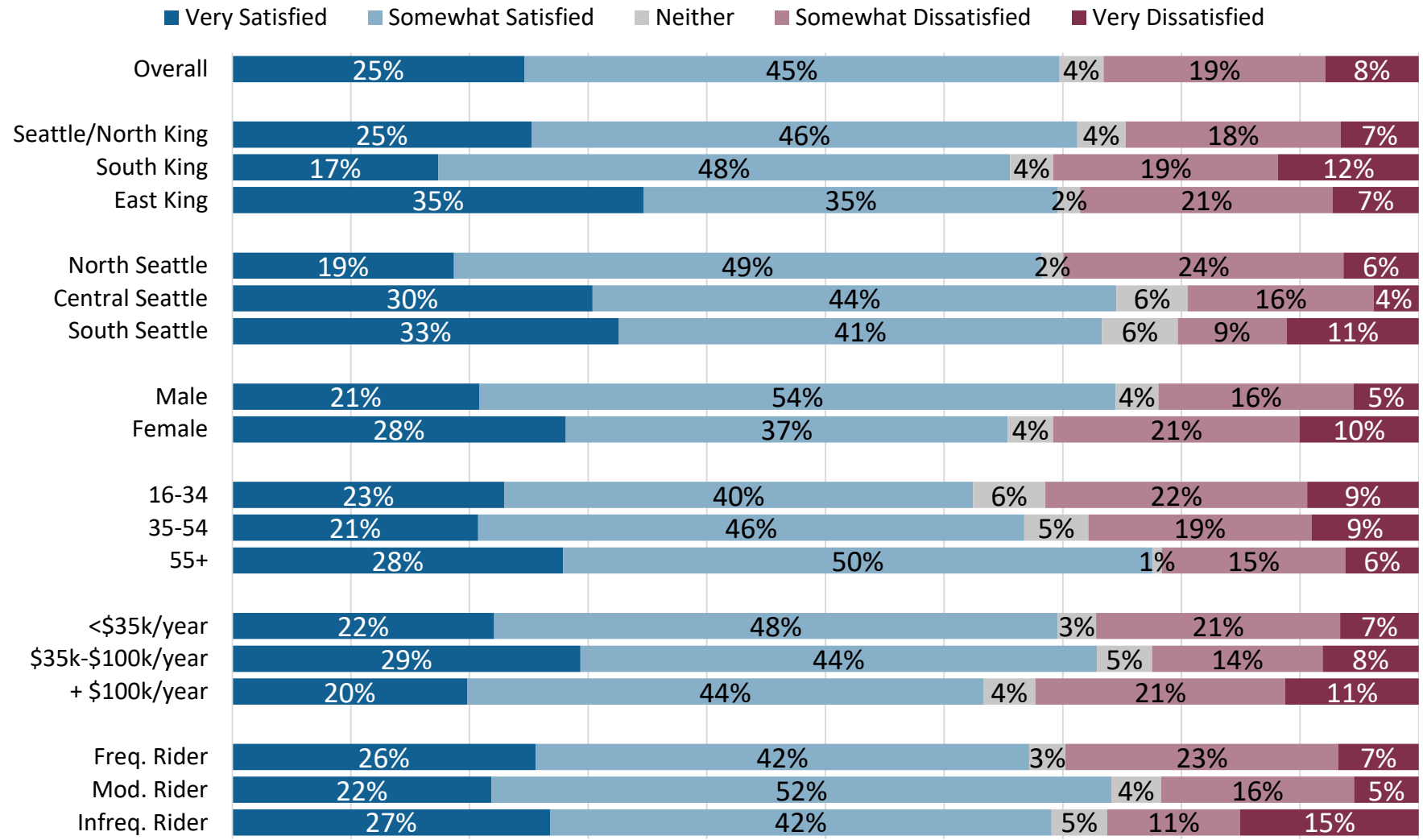
*Both of the transfer satisfaction elements tested – including the **number of transfers** and the **wait time while transferring** -- were relatively low-rated but also very important, making them key areas of focus for improvement.*

While these likely pose ongoing scheduling challenges in light of regular service changes for Metro, Sound Transit and other services, riders consider transfers very important aspects of their overall satisfaction with Metro.

Wait Time Satisfaction by Subgroup

[Improvement Priority]

Transfer wait time is one of the lowest-rated elements in the survey and over a quarter of riders in most areas are dissatisfied with this attribute. Efforts to improve satisfaction with wait times between transfers could have strongly positive impacts on riders' satisfaction with the agency overall – at least among the half (49%) of Metro riders who make transfers for their most typical transit trips.

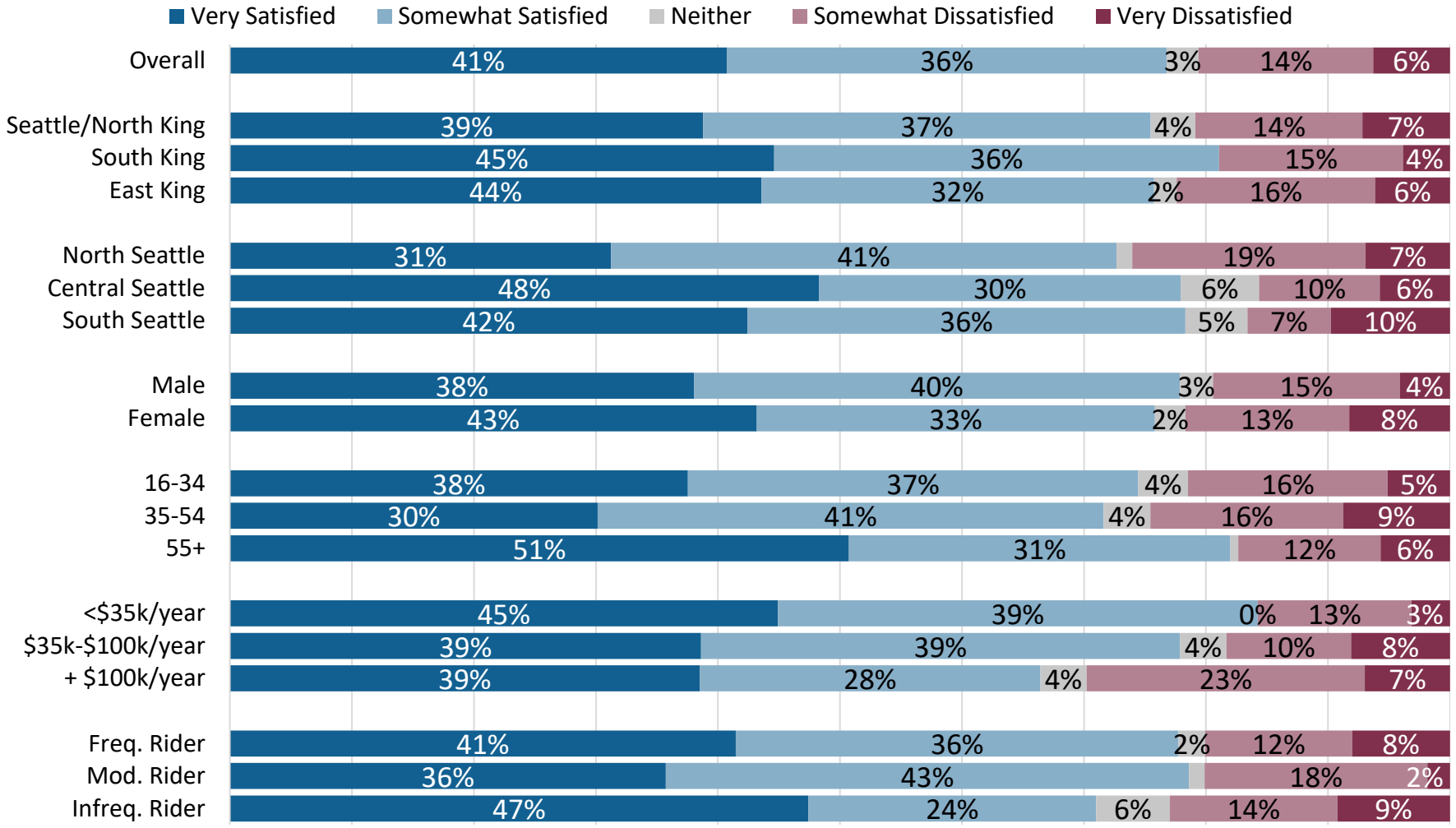


*M11. Are you satisfied or dissatisfied with the **wait time** when transferring? (n=357)*

Number of Transfers by Subgroup

[Improvement Priority]

Riders in North Seattle and from $100K+/year households are less content with the number of transfers they have to make than other rider groups. This element has a relatively high impact on many riders' overall satisfaction with Metro. This is generally considered an improvement priority, although the expanded service and logistics required to reduce the number of transfers for most riders may make it less practical to implement without additional funding for more direct routes throughout the system.



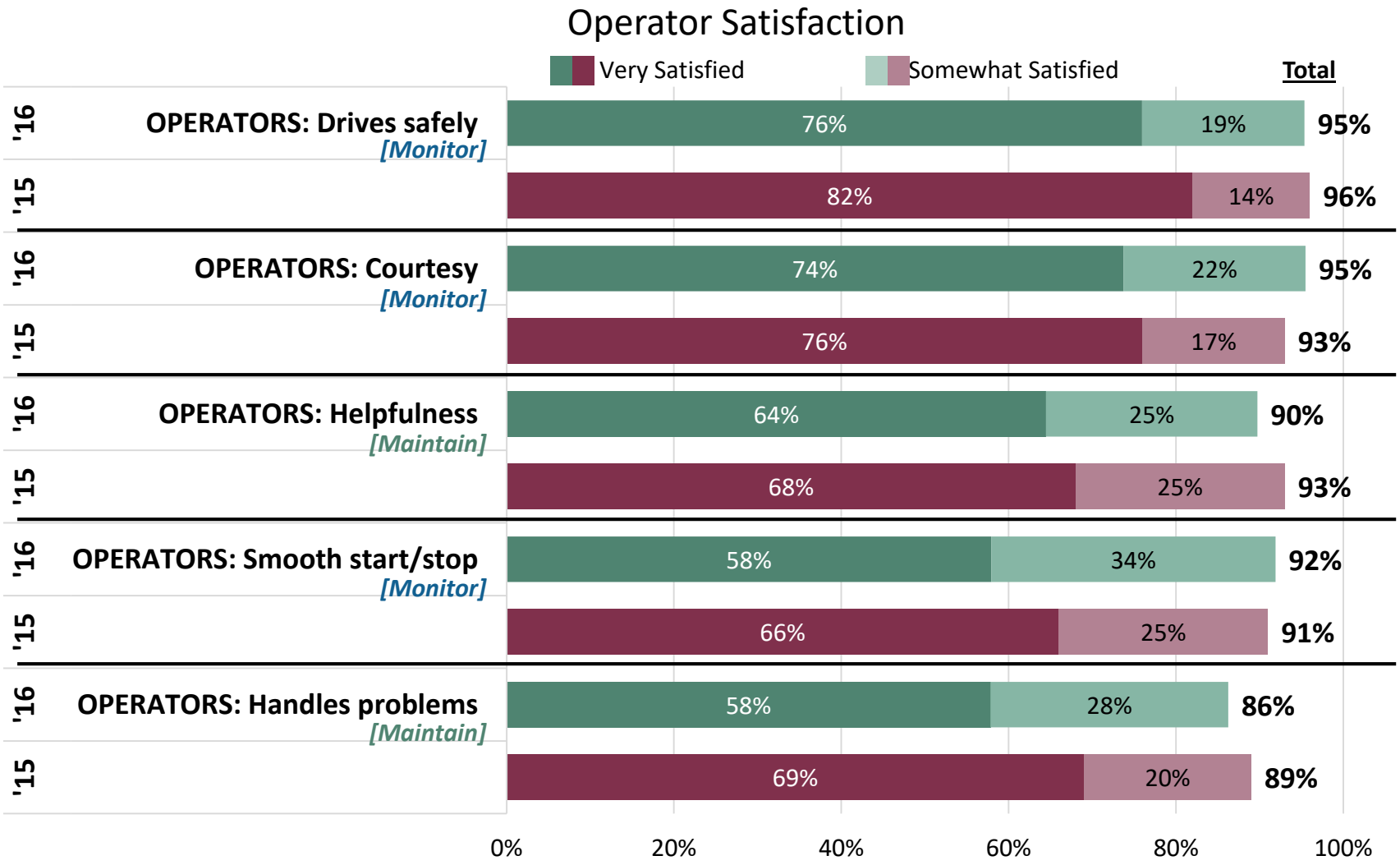
M9. Are you satisfied or dissatisfied with the number of transfers you have to take. (n=357)

King County METRO

Operator Satisfaction

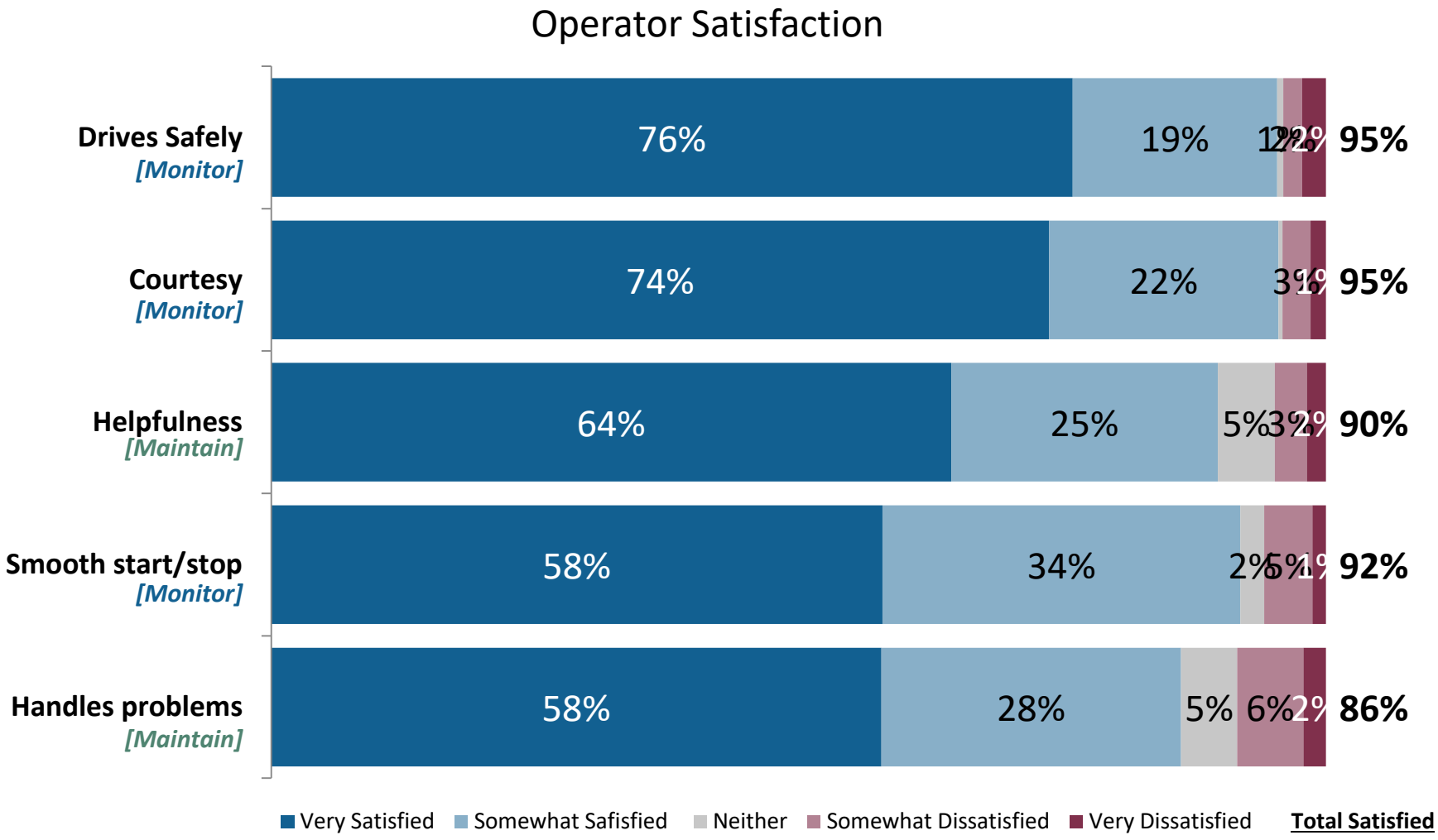
Operator Satisfaction – Year-to-Year

Some of the operator satisfaction elements – including stopping/starting smoothly and handling problems – receive lower satisfaction intensity than in 2015, though none have seen significant drops in their broader satisfaction levels. Each remains relatively highly-rated, overall, and none require immediate actions for improvement. Driver helpfulness and handling problems are the most important operator elements in 2016 and should be maintained to ensure satisfaction with these items remains high going forward.

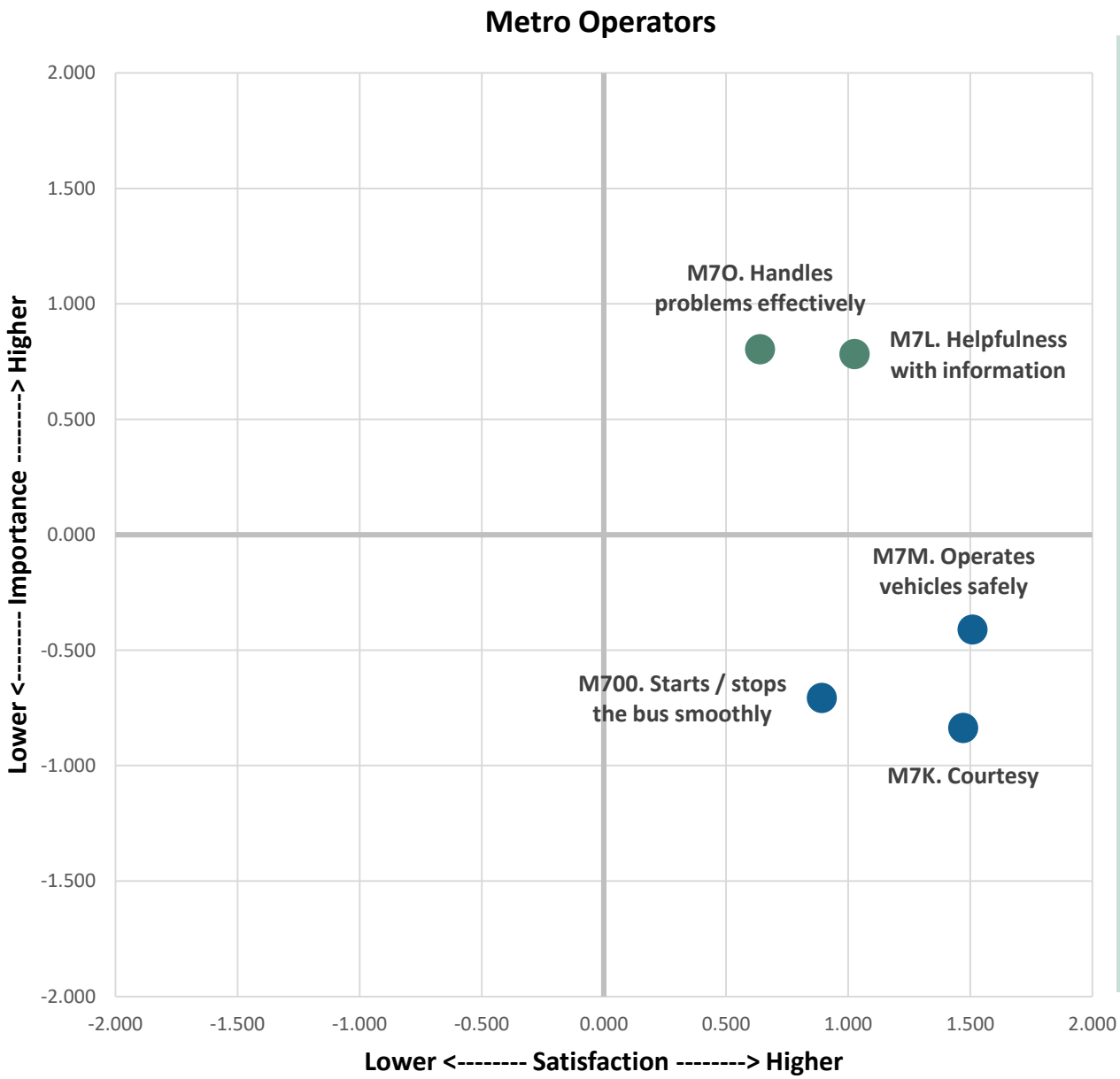


Operator Satisfaction – Full Ratings

A majority of riders are "very satisfied" with each of the operator elements with negligible dissatisfaction for each. None of these items require active improvement efforts but as relatively important drivers of overall agency satisfaction, operator helpfulness and ability to handle problems should be tracked to ensure those ratings stay high in the future.



Key Drivers: Metro Operators



While some operator elements are more important than others, riders are very satisfied with all five of the items in the Operator service dimension.

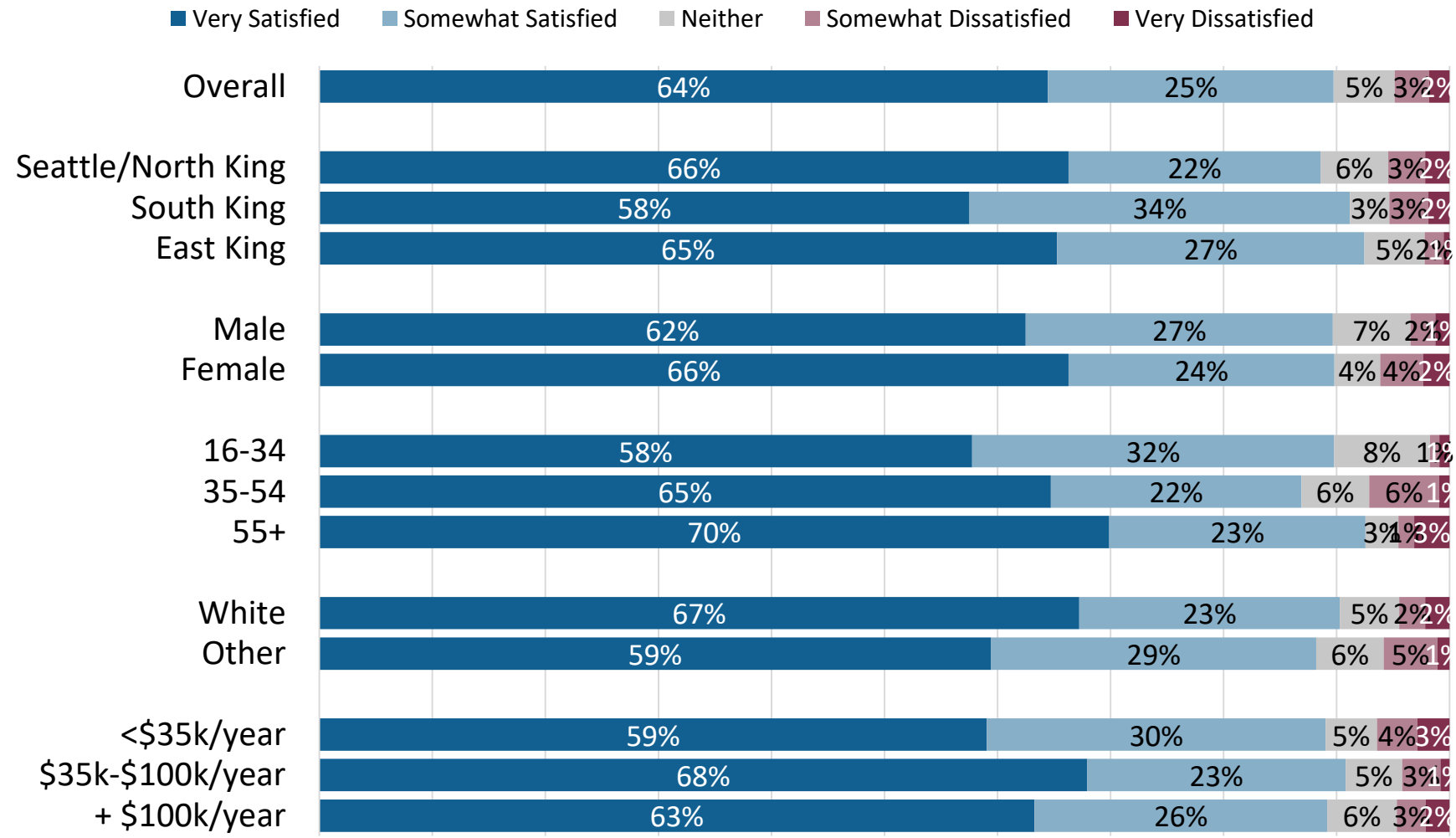
*Operators **handling problems effectively** and **helpfulness with information** are seen as the most important driver-related elements and both are well rated. These remain potential areas of focus for maintaining high operator ratings, overall.*

*Additionally, riders are also very satisfied with operators **driving safely**, **courtesy** and **smoothly starting/stopping the bus** but these aren't particularly critical elements for improving or maintaining overall satisfaction with Metro.*

Operators Helpfulness

[Maintain]

Driver helpfulness is a key driver of agency satisfaction for many riders. It is also a highly rated attribute that most riders believe operators are doing very well. This element does not require any significant attention for improvement but it relative importance means that efforts should focus on maintaining those current satisfaction levels going forward.

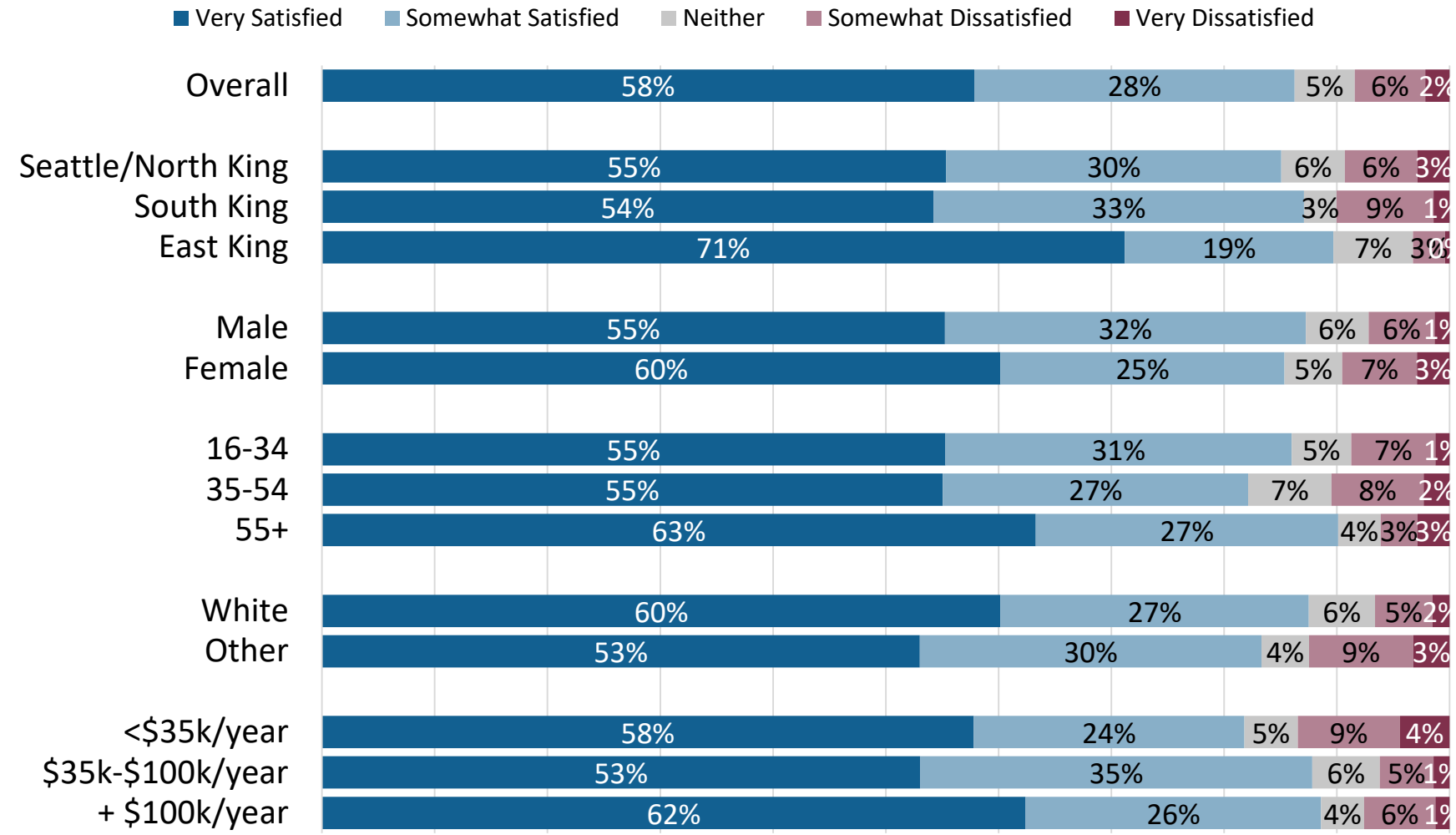


M7L. Are you satisfied or dissatisfied with driver helpfulness with route and stop information?

Operators Handling Problems

[Maintain]

Drivers' ability to handle problems is one of the key operator-centric service elements and is highly rated across all respondent group. East King and 55+ riders are particularly satisfied with this element. Efforts should focus on tracking this element to ensure these ratings remain high, as it is a relatively strong driver of overall satisfaction with the agency.

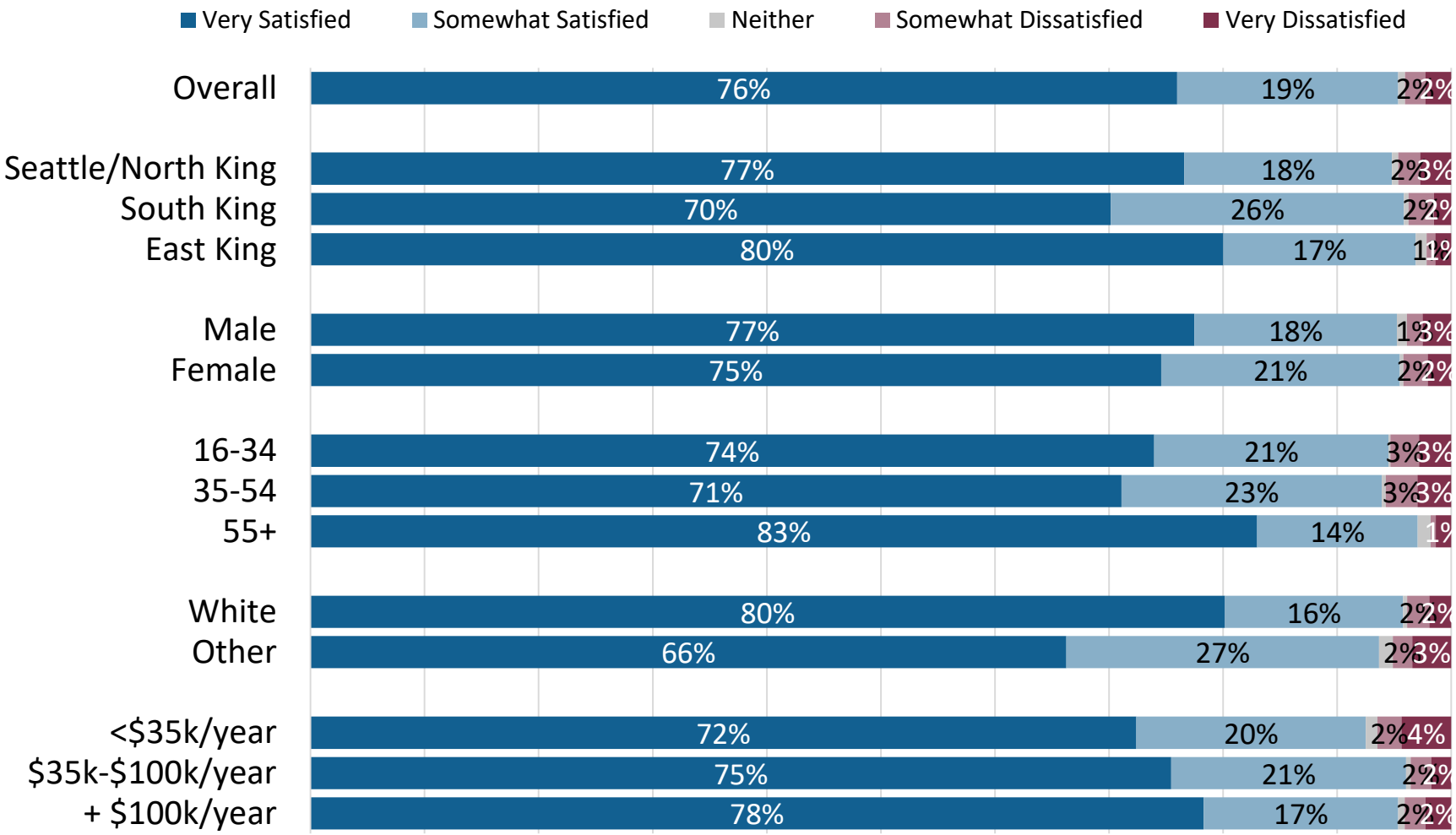


M7O. Are you satisfied or dissatisfied with drivers effectively handling problems on the bus?

Drives Safely

[Monitor]

Riders in all areas are highly satisfied with Metro operators' safety and competency in driving buses. This element does not require any major improvement efforts at this time.

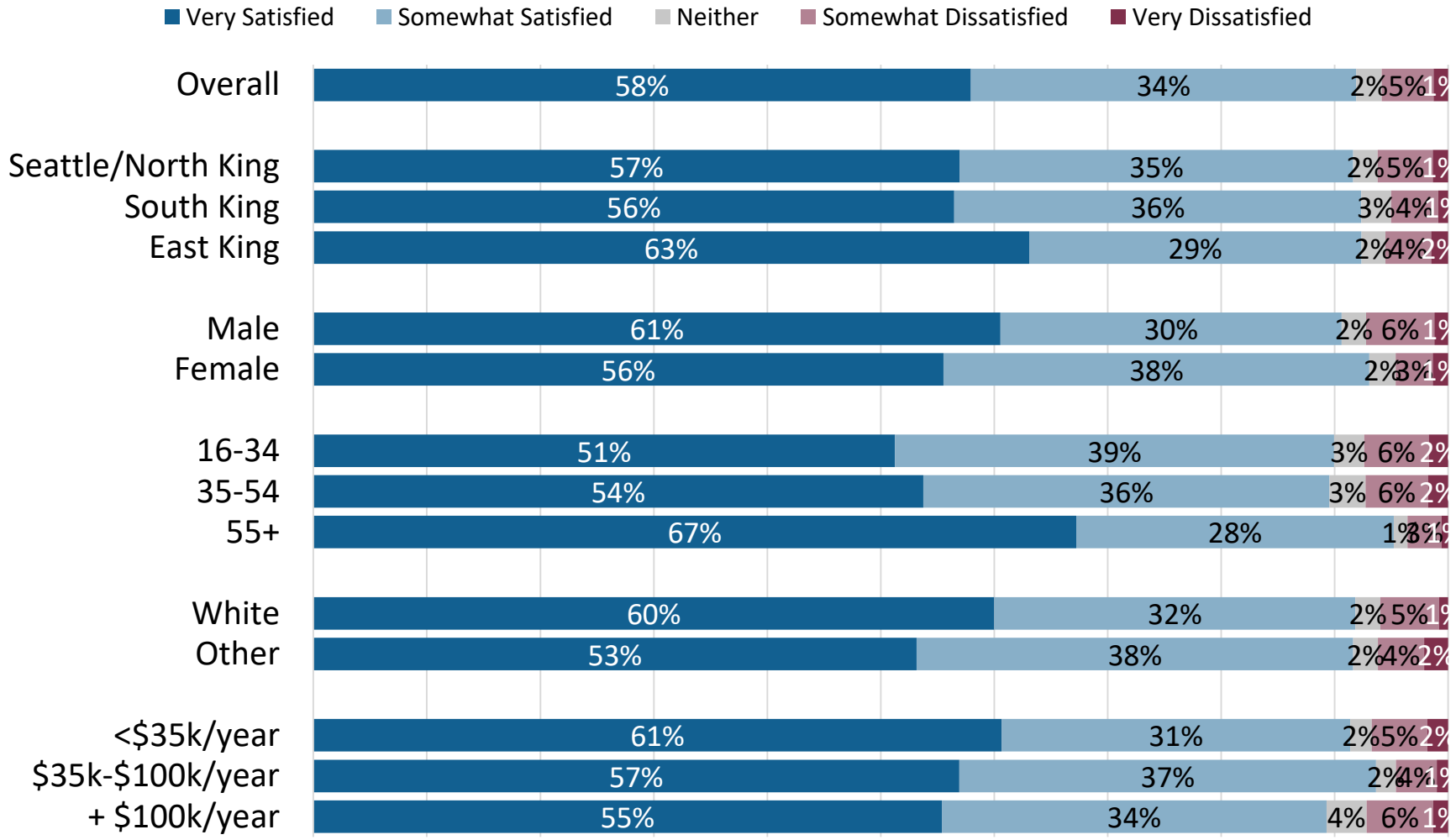


M7M. Are you satisfied or dissatisfied with drivers operating the bus in a safe and competent manner?

Smooth Start/Stops

[Monitor]

As with general safety and competency, riders throughout the county are also highly satisfied with the smoothness in how drivers start and stop the bus. This does not need to be a key area of focus in the short term.

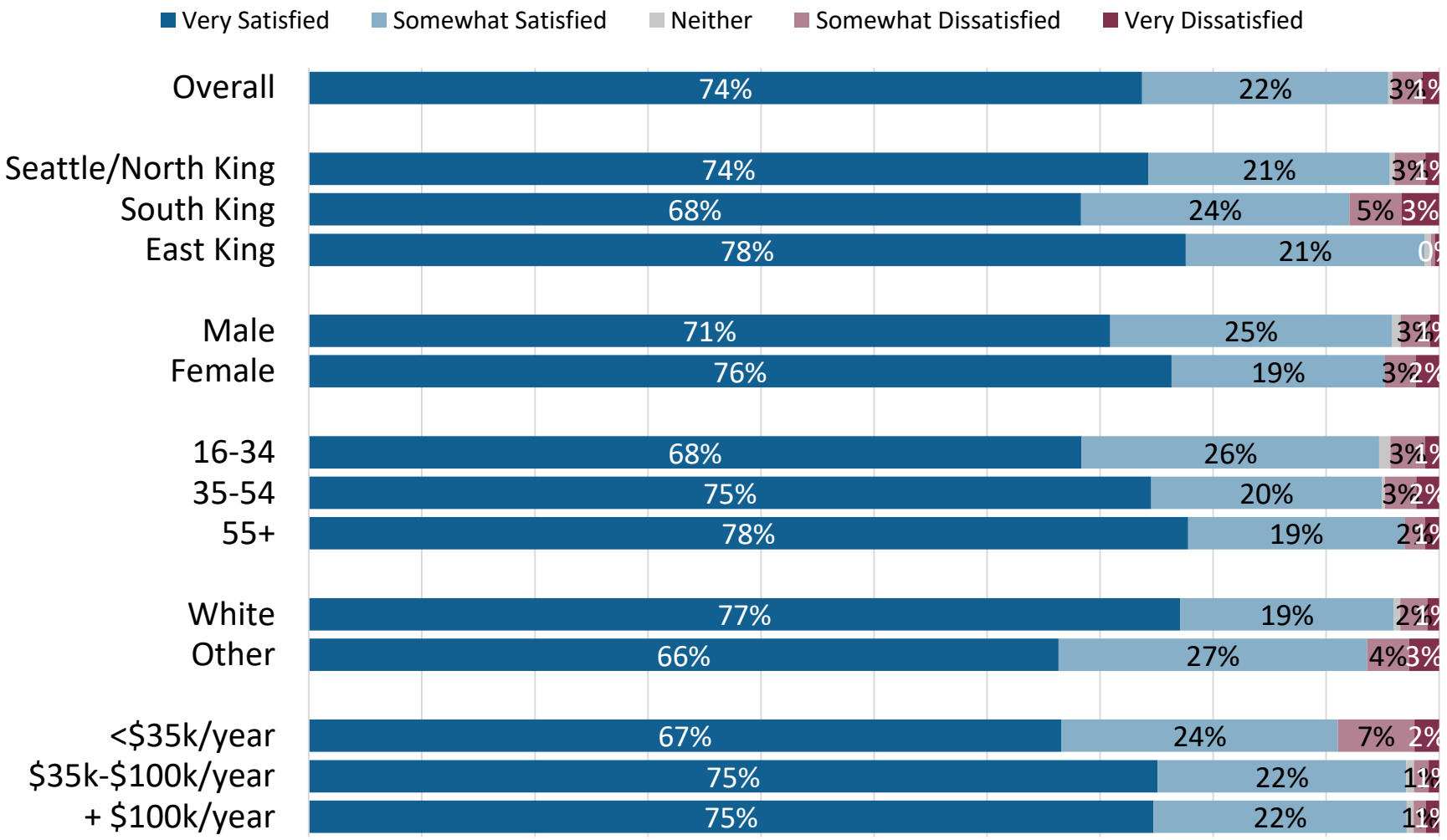


M700. Are you satisfied or dissatisfied with drivers starting and stopping the bus smoothly?

Courtesy of Operators

[Monitor]

Riders are also very satisfied with operator courtesy but they also consider it a less critical aspect of their satisfaction with Metro, overall. This element does not require any significant attention at this time.



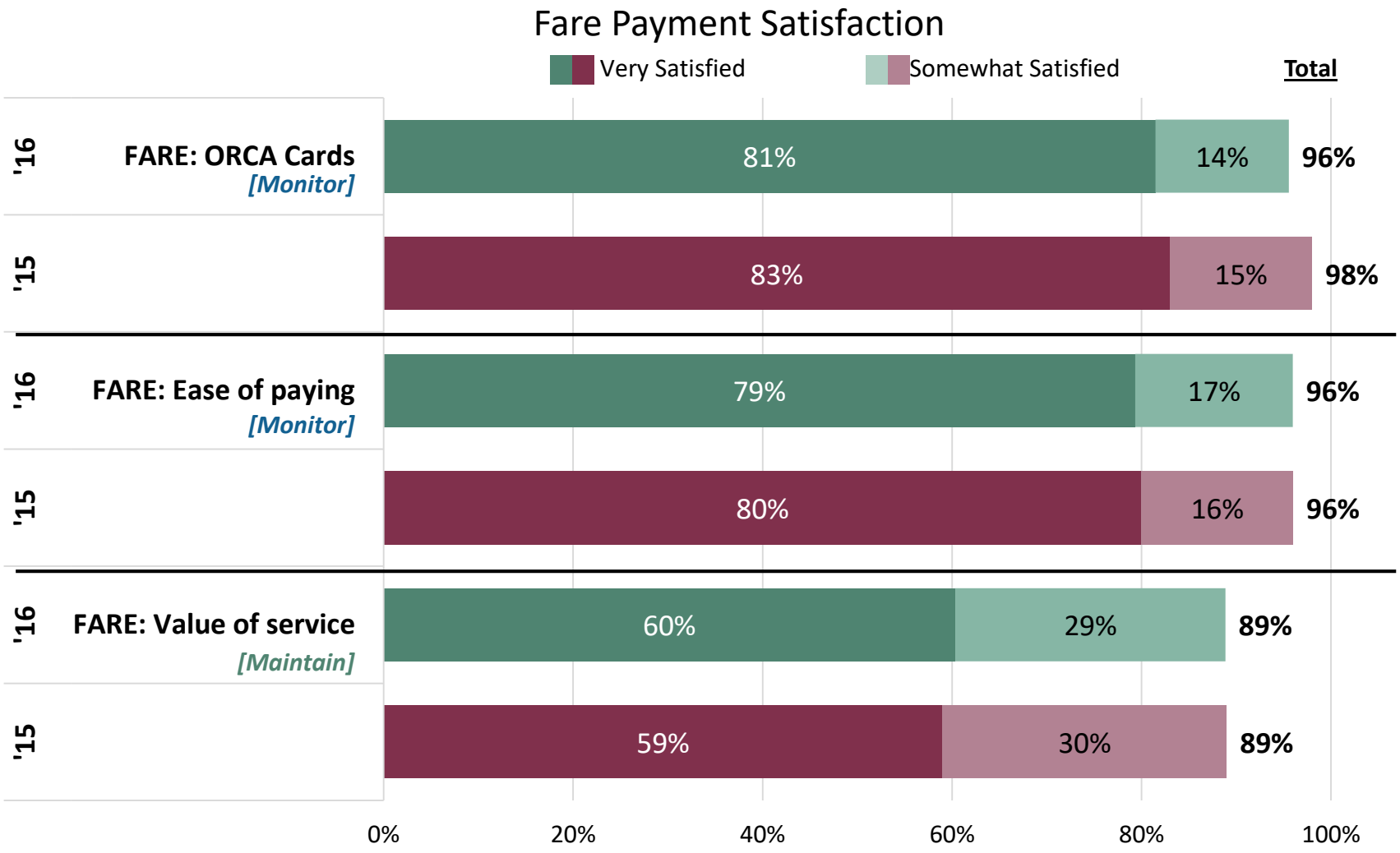
M7K. Are you satisfied or dissatisfied with driver courtesy?

King County METRO

Fare Payment Satisfaction

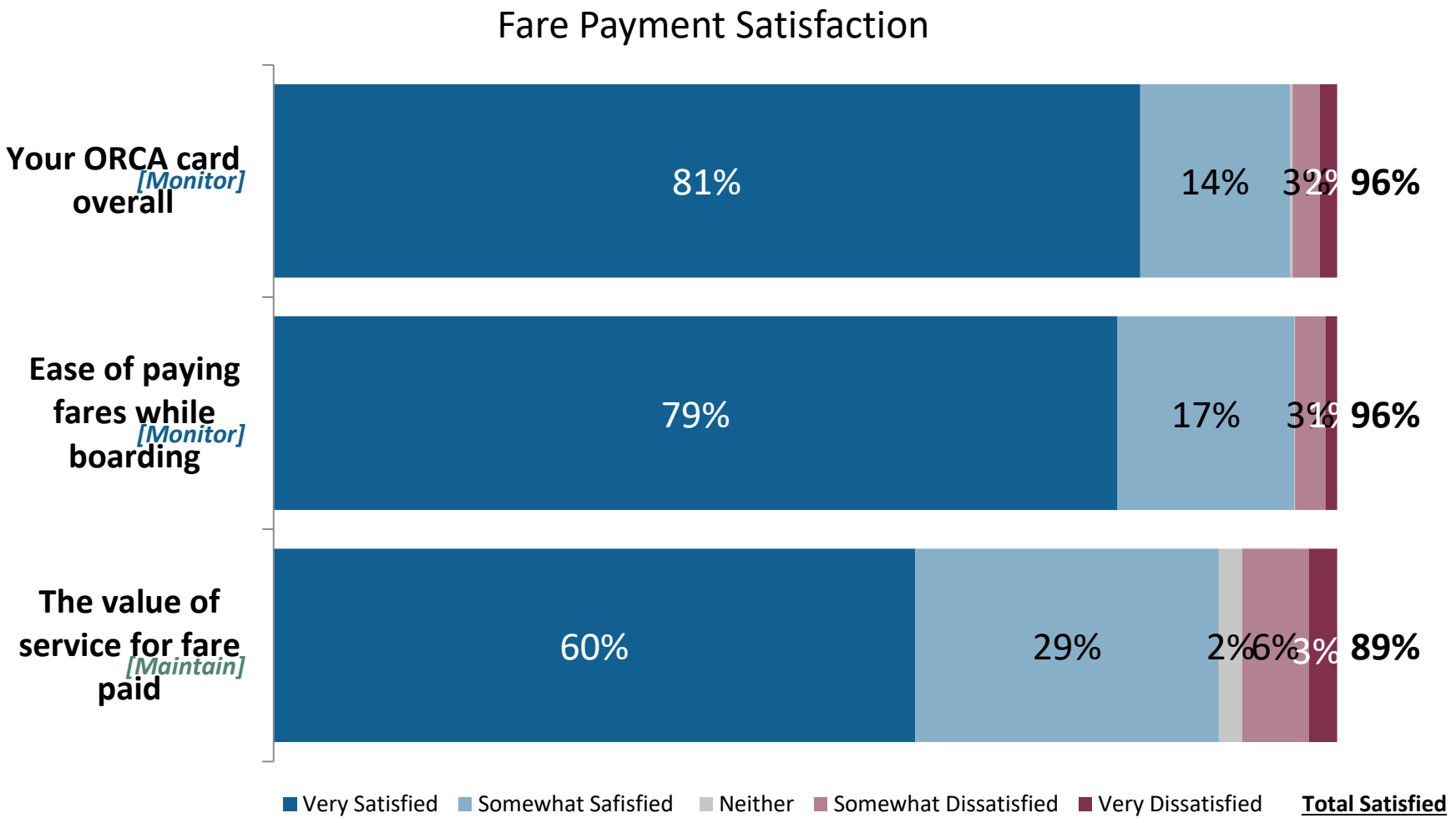
Fare Payment Satisfaction – Year-to-Year

The fare payment ratings are largely unchanged from last year. Riders are extremely satisfied with ORCA cards, overall, as well as the ease of paying fares. Although there is less enthusiasm for the value that Metro fares provide, a strong majority of riders are still "very satisfied" with it.

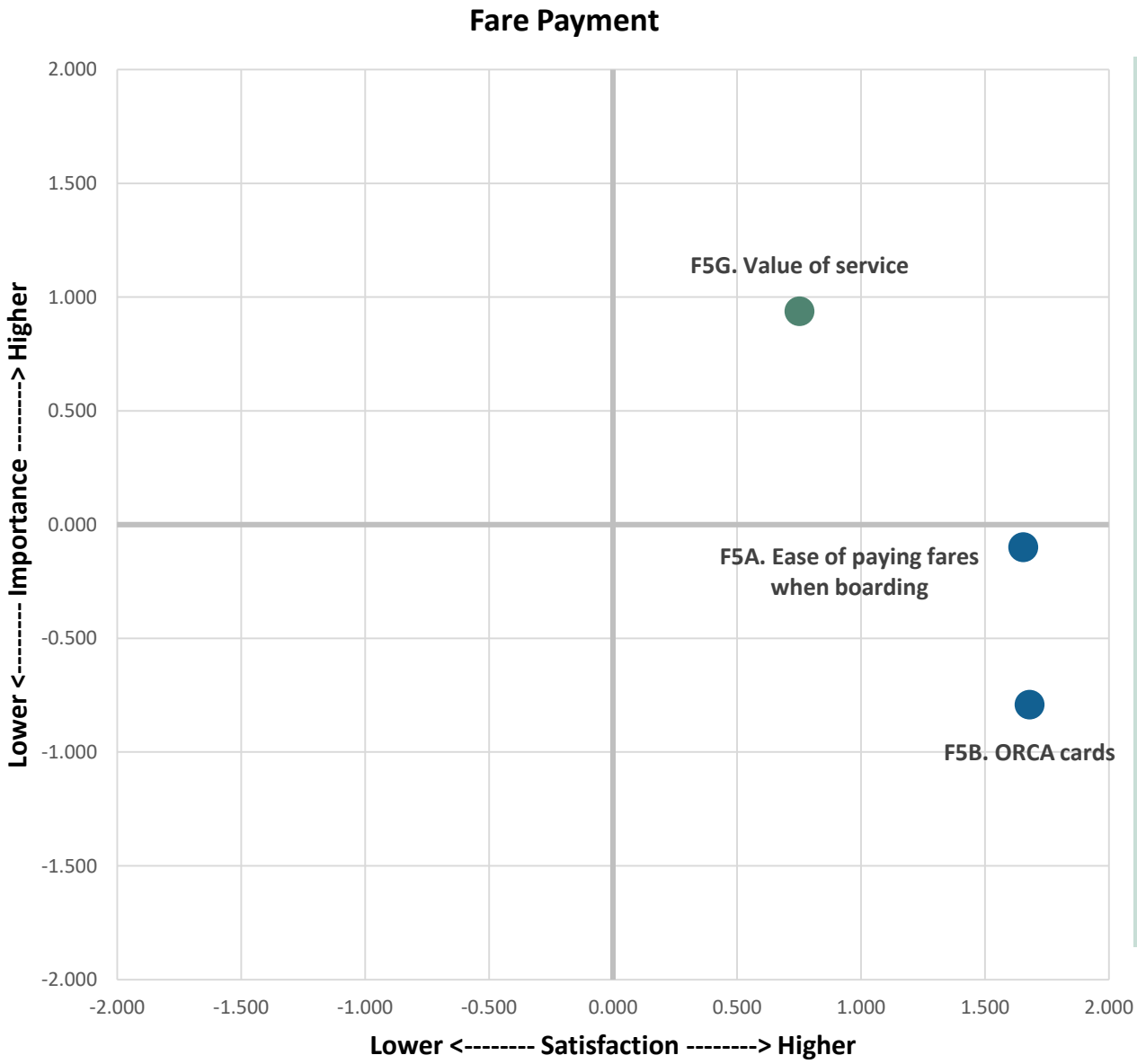


Fare Payment Satisfaction – Full Ratings

While satisfaction intensity ("very satisfied") is lower for the value of service, riders are currently very satisfied with all three fare payment elements. None of these need to be prioritized for improvements at this time, though efforts should focus on maintaining riders' satisfaction with the value of the service to help mitigate any negative impacts of future fare increases.



Key Drivers: Fare Payment



Riders are generally very satisfied with the fare-related elements of Metro's service. None of these items necessarily require any attention for immediate improvements.

***Value of service** is generally important to riders so this will be worth focusing some efforts on maintaining satisfaction over the long run, particularly as fares continue to increase in the future.*

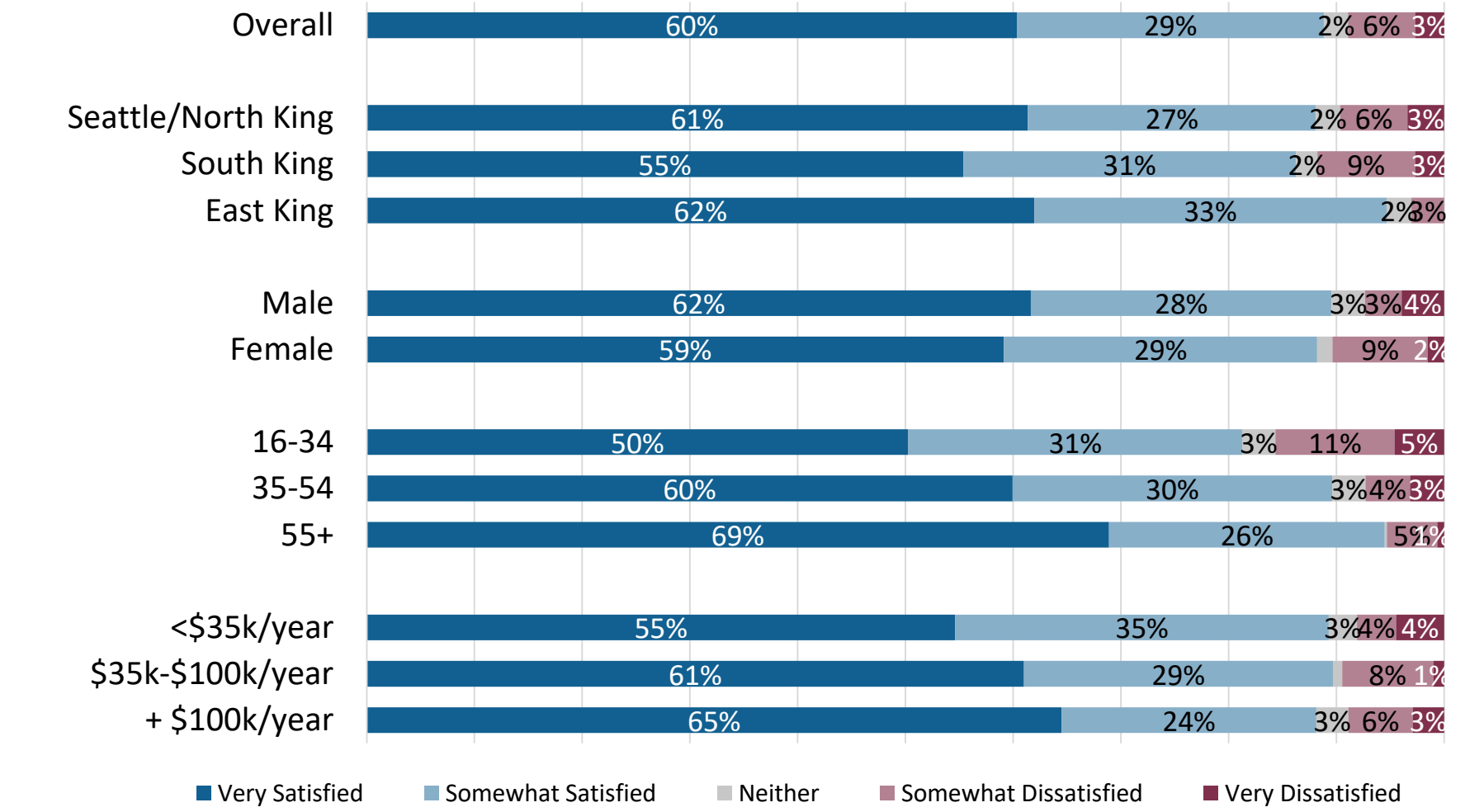
*Riders are currently very happy with the **ORCA card system** and are satisfied with the **ease of paying fares**. These may be worth monitoring going forward but neither are considered particularly critical priorities in the short term.*

**M5B2. Your U-PASS overall has been excluded from analysis because of the small n size*

Value of Service by Subgroup

[Maintain]

Respondents across major rider subgroups are generally satisfied with Metro's value of service for the fare, though enthusiasm is slightly lower among younger 16-34 riders, lower-income riders and riders in South King. Efforts can be made to keep satisfaction levels high going forward – particularly among these more cost-sensitive rider groups. This could become a greater challenge as fares inevitably increase in the future.

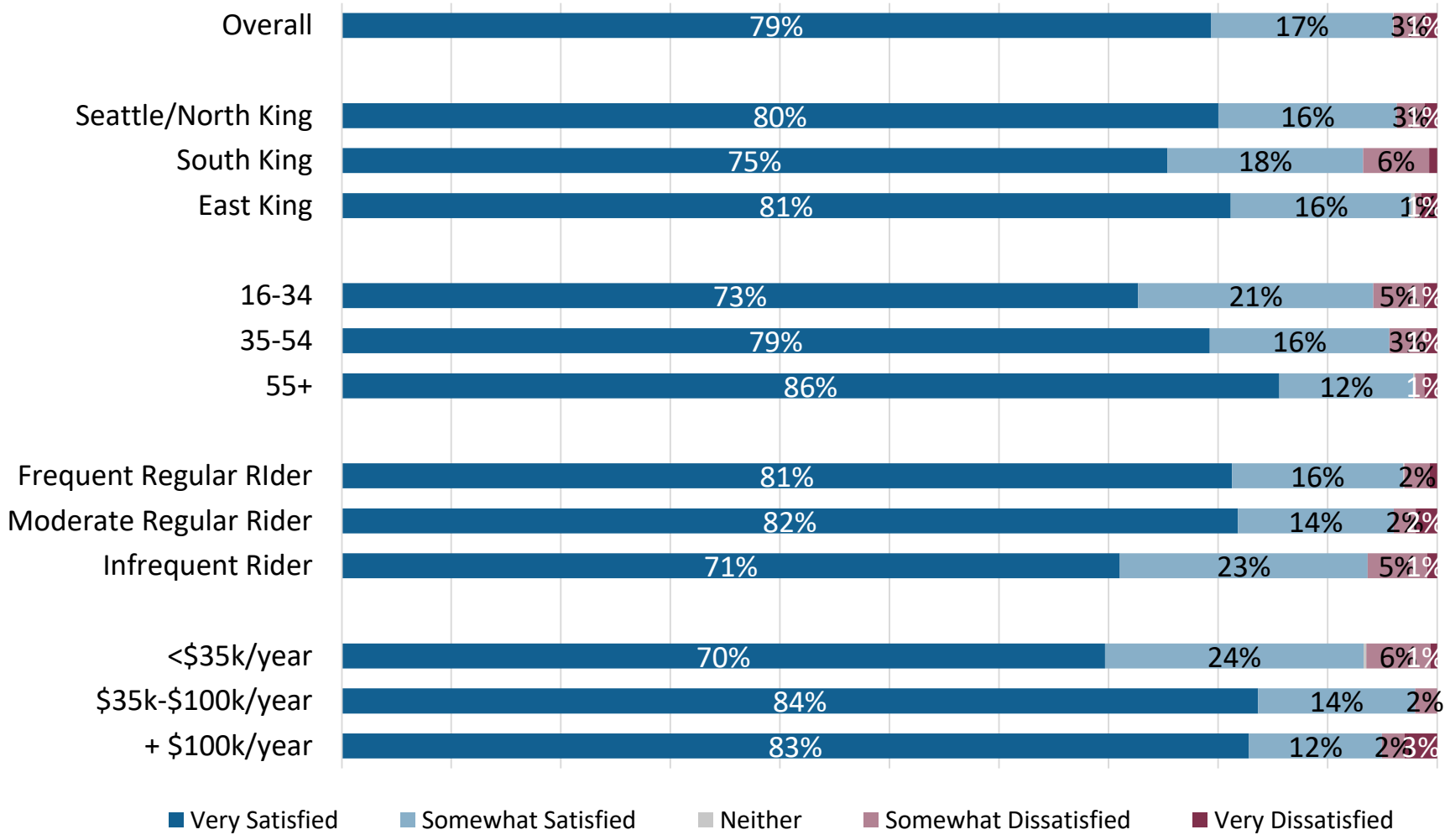


F5G. Are you satisfied or dissatisfied with the value of service for fare paid?

Ease of Paying Fares by Subgroup

[Monitor]

Ratings for the ease of paying fares are very high across the board and is not generally considered an issue for any particular rider subgroup, though lower income riders and infrequent riders are less enthusiastic in their satisfaction than other rider groups.

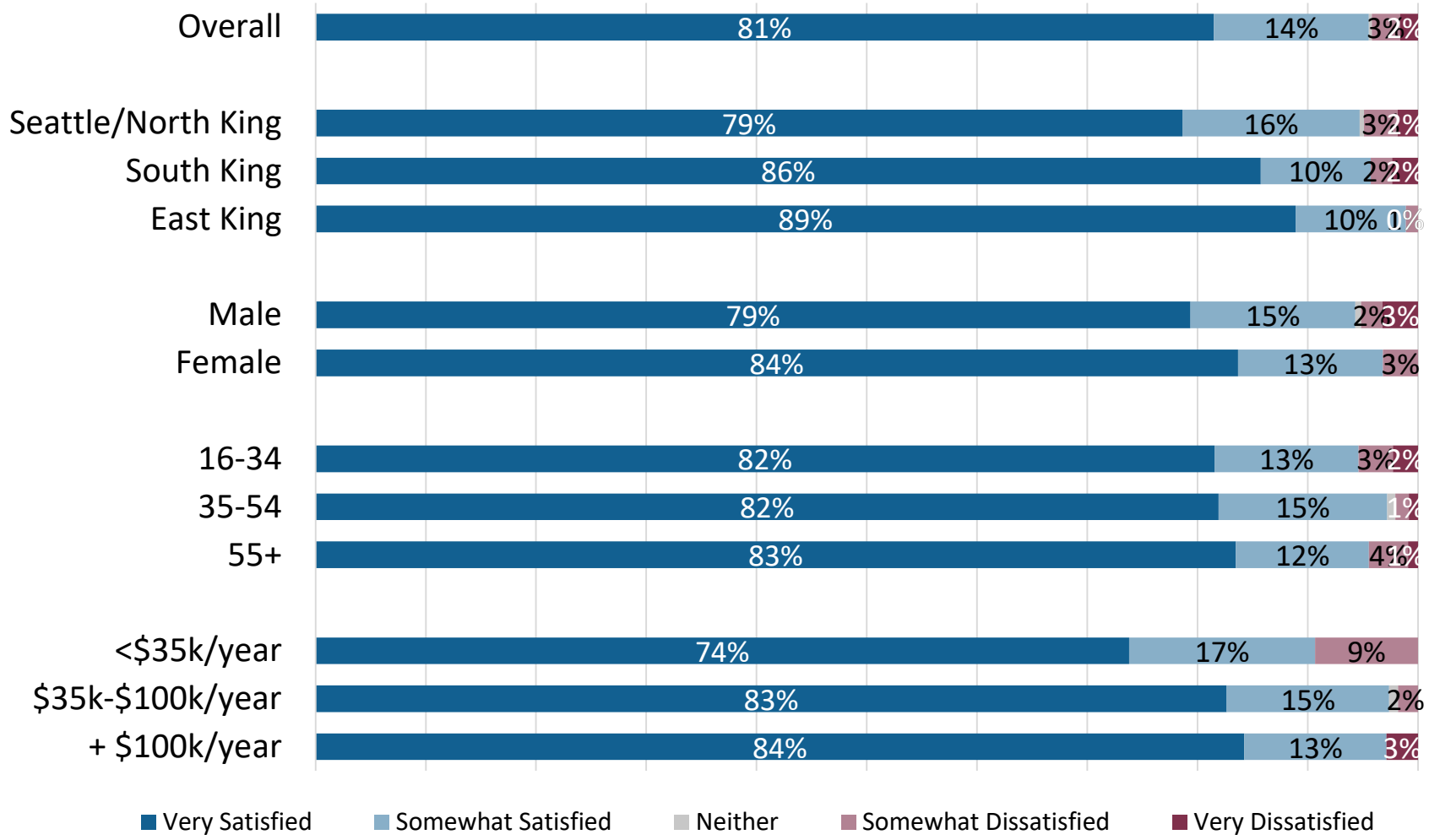


F5A. Are you satisfied or dissatisfied with the ease of paying fares when boarding?

ORCA Card Satisfaction by Subgroup

[Monitor]

Riders across each subgroup are very satisfied with ORCA, overall. This element does not require any major improvement efforts at this time.



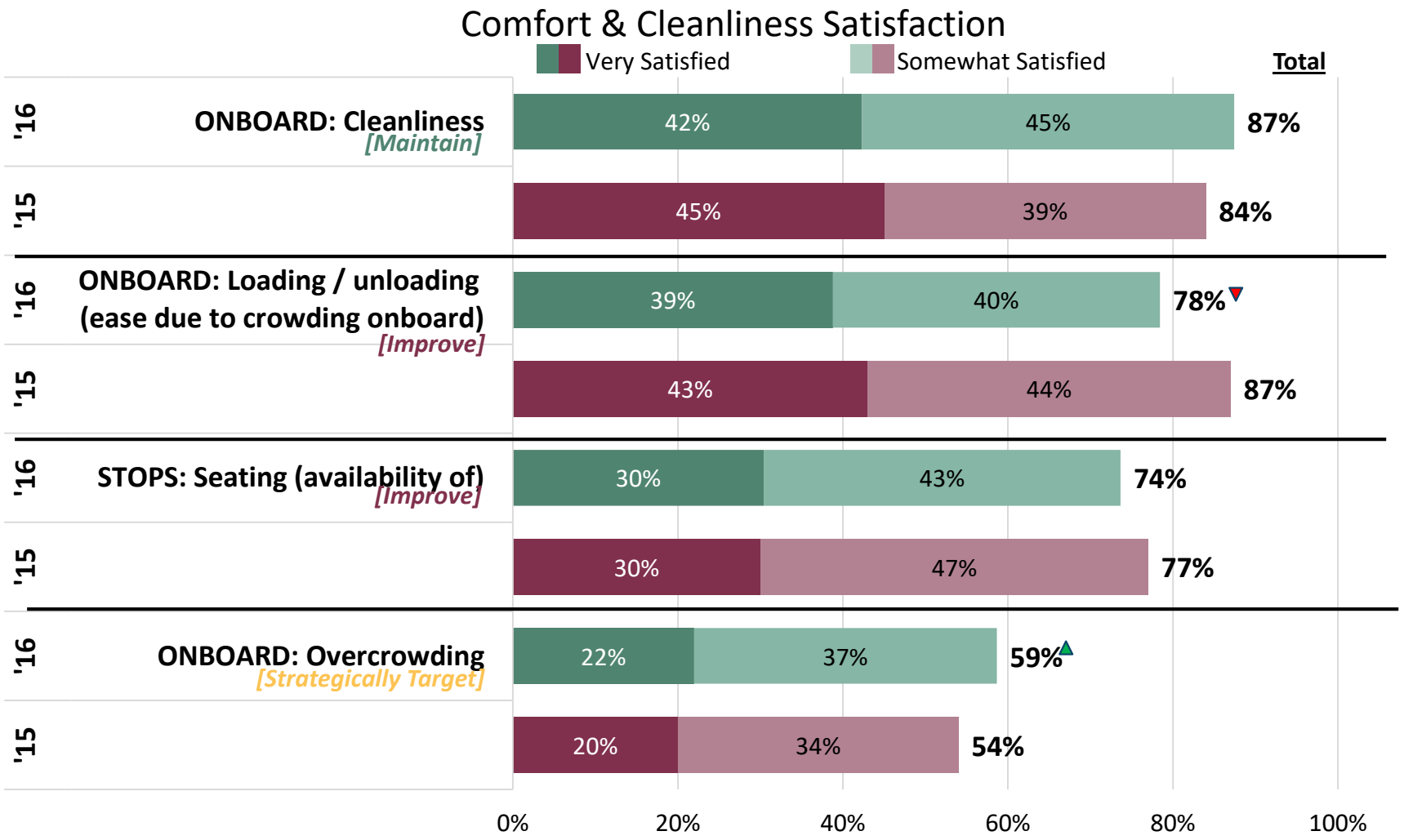
F5B. Are you satisfied or dissatisfied with your ORCA card overall? (n=606)

King County METRO

Comfort & Cleanliness Satisfaction

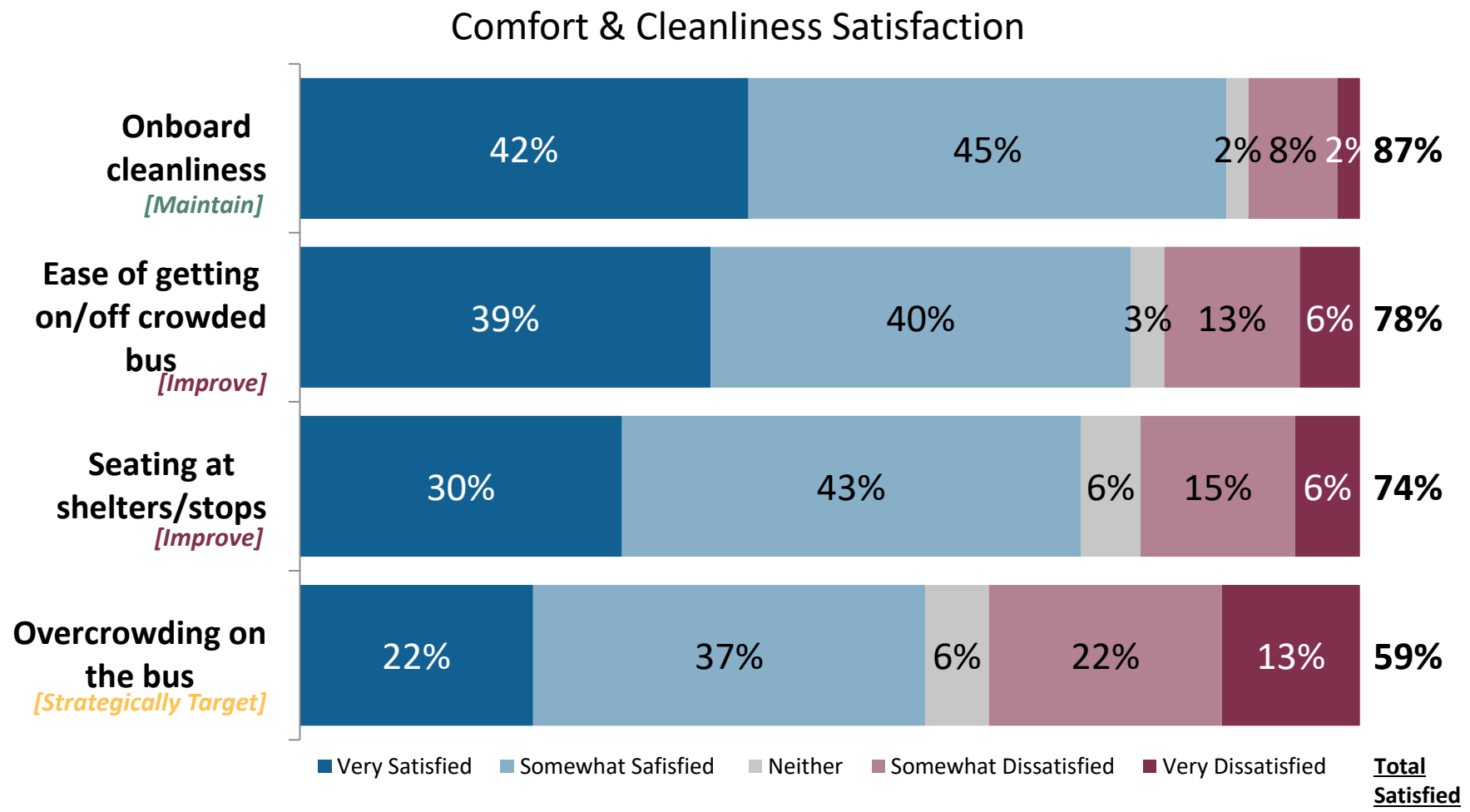
Comfort & Cleanliness Satisfaction – Year-to-Year

Comfort and cleanliness ratings have mostly held steady from 2015, with a decrease to loading/unloading due to crowding and an increase in the overcrowding rating. A satisfaction dropped by 9 points from last year, Loading/unloading due to crowding is a notable improvement target as satisfaction is currently underperforming given its relatively high level of importance.

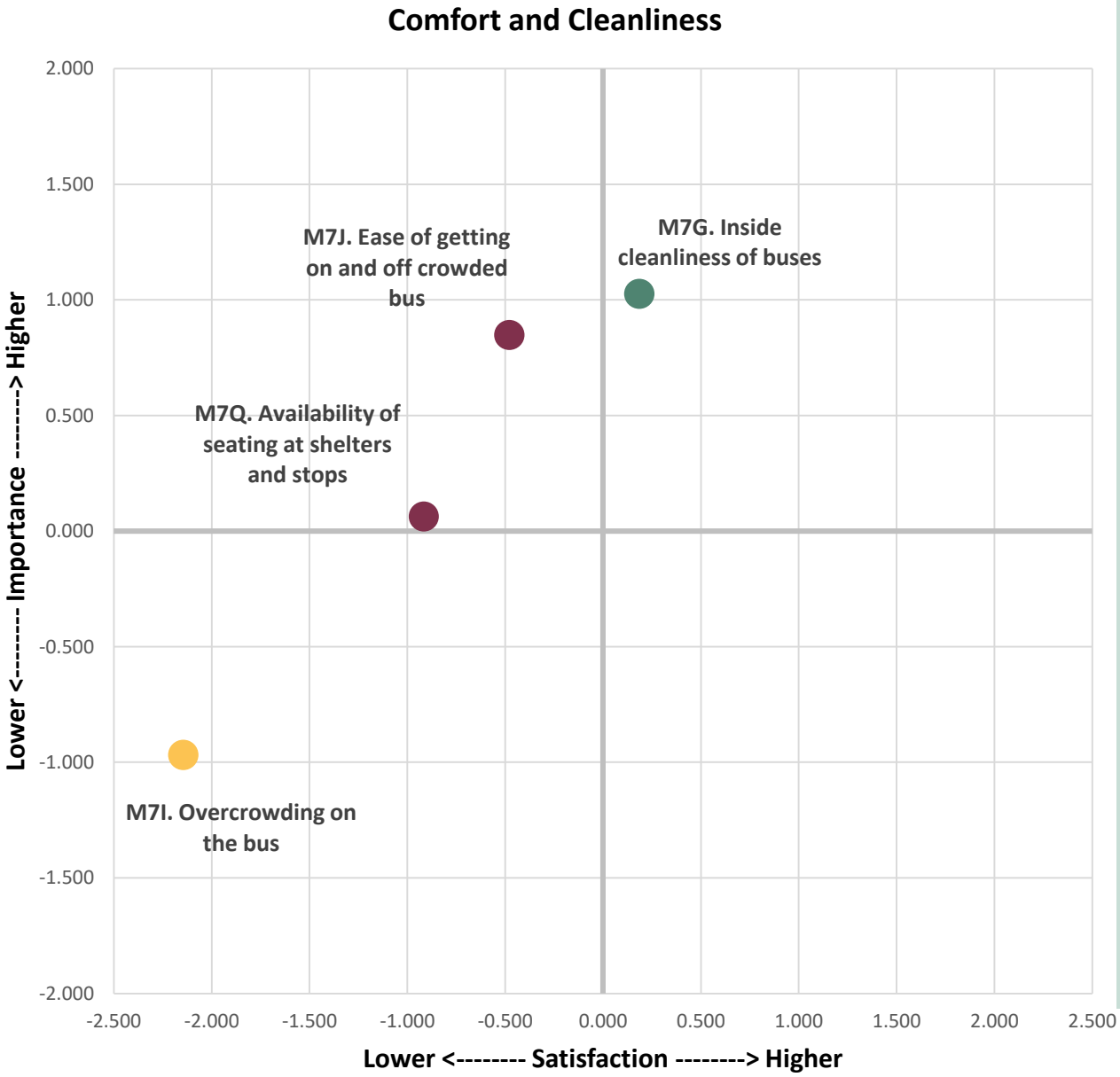


Comfort & Cleanliness Satisfaction – Full Ratings

The comfort & cleanliness service dimension includes a couple of notable improvement targets – including the availability of seating at stops and more effective loading/unloading on crowded buses – which could help drive overall Metro satisfaction in the future if these are addressed in the short term. As one of the most important attributes in the survey, onboard cleanliness is a borderline improvement priority, particularly in South King where dissatisfaction is higher than in other areas.



Key Drivers: Comfort and Cleanliness



The broader comfort and cleanliness dimension is to be strategically targeted for improvements, as needed.

*More specifically, the **ease of getting on and off crowded vehicles** and – to a lesser extent – the **availability of seating at stops and shelters** are potentially high-focus areas for improvement. Given it's high level of importance, improving the **interior cleanliness of buses** could also be considered a borderline improvement area despite its slightly higher ratings.*

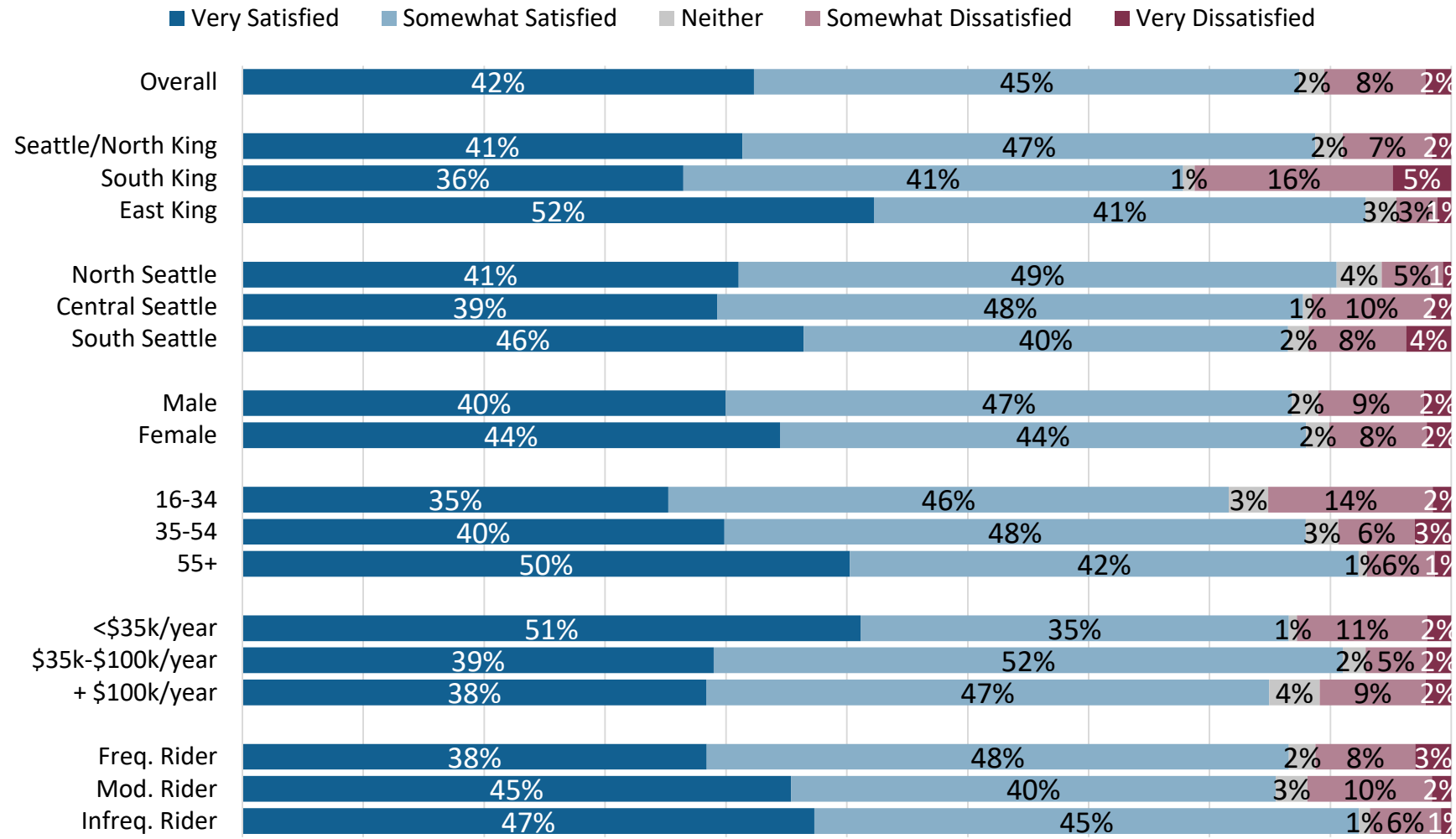
Of these elements, interior cleanliness may be the easiest to address without significant funding or structural changes to the system. Riders consider it the most important comfort and cleanliness attribute (by a slight margin) but its satisfaction levels still have plenty of room for growth.

*While seating availability and ease of boarding/exiting may be a bi-product of **overcrowding**, riders consider it far more important than the broader issue itself. Both may be more difficult to address without funding for additional service.*

Cleanliness Onboard

[Maintain]

Cleanliness ratings are generally high in all rider groups except for South King where one-in-five riders are dissatisfied with the element. Cleanliness is a relatively important attribute that could be considered a borderline target for improvement, especially in South King where there is greater dissatisfaction with this attribute than in other areas.

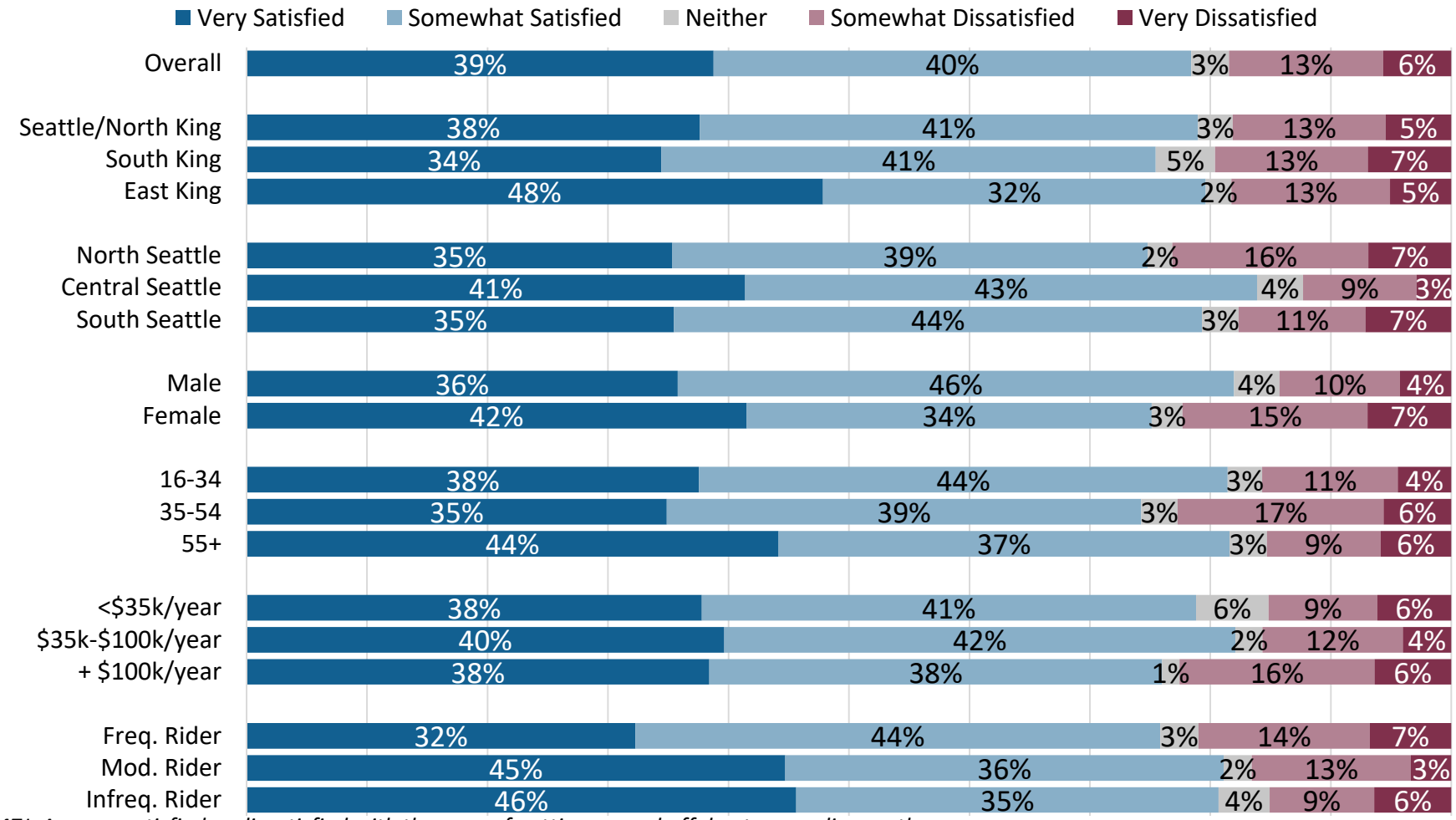


M7G. Are you satisfied or dissatisfied with the inside cleanliness of buses?

Ease of Getting On/Off Crowded Bus

[Improvement Priority]

Although a majority of riders are satisfied with the ease of getting on/off buses due to crowding, the "very satisfied" ratings vary by geography – with Seattle/North and South riders expressing lower positive intensity. Nearly a fifth of riders are dissatisfied with this element and dissatisfaction is highest among North Seattle, female, 35-54, higher income and frequent riders. As the second-most-important comfort and cleanliness attribute, this can be considered an improvement priority, though likely reliance on additional/more frequent service or larger buses may make it difficult to address in the short term.

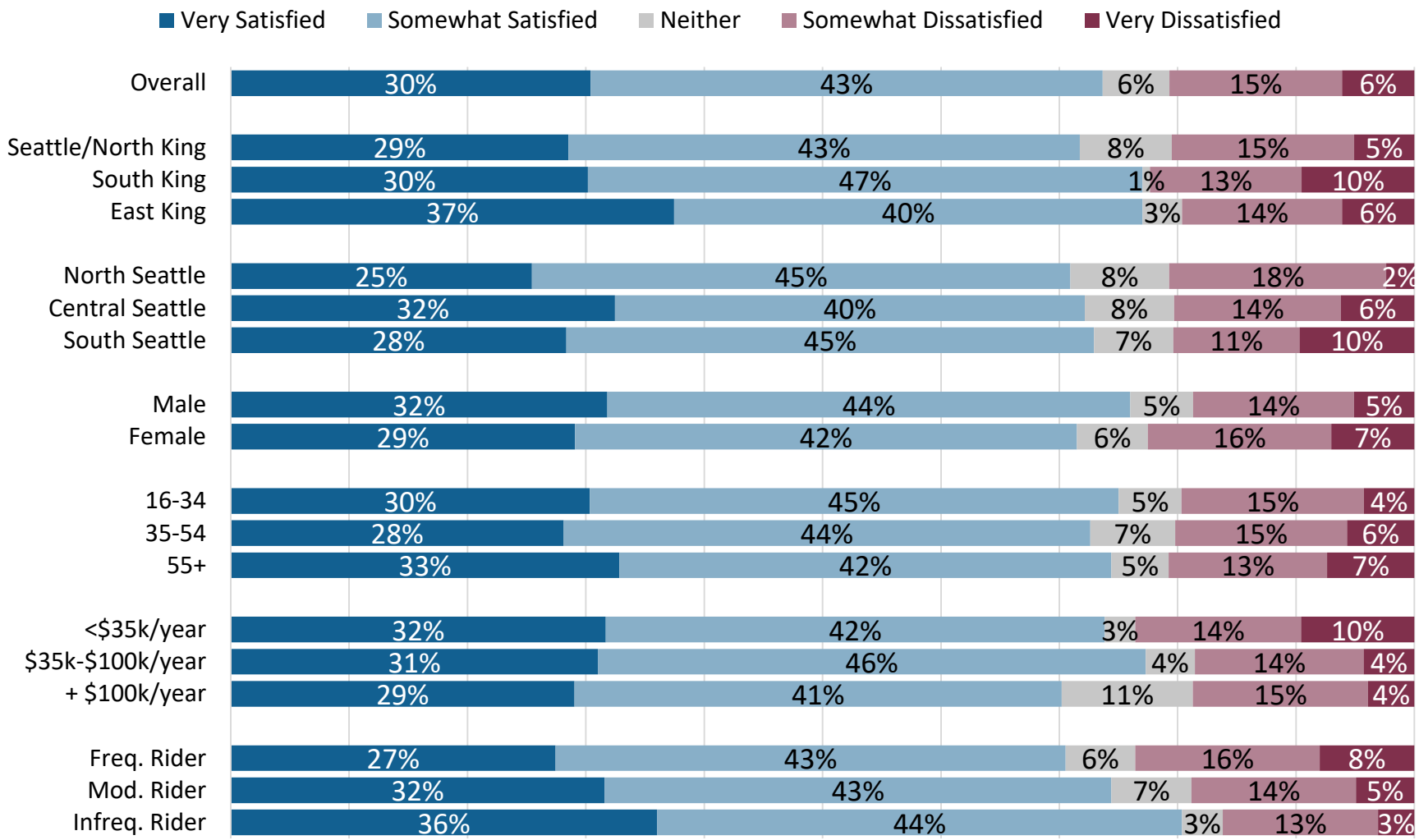


M7J. Are you satisfied or dissatisfied with the ease of getting on and off due to crowding on the bus?

Seating at Shelters/Stops

[Improvement Priority]

There is relatively low positive intensity in riders' satisfaction with the seating at stops and shelters but satisfaction is generally consistent across most rider subgroups. One-in-five riders are at least "somewhat dissatisfied" with this attribute and it is a moderate driver of satisfaction, making it a potential improvement priority.

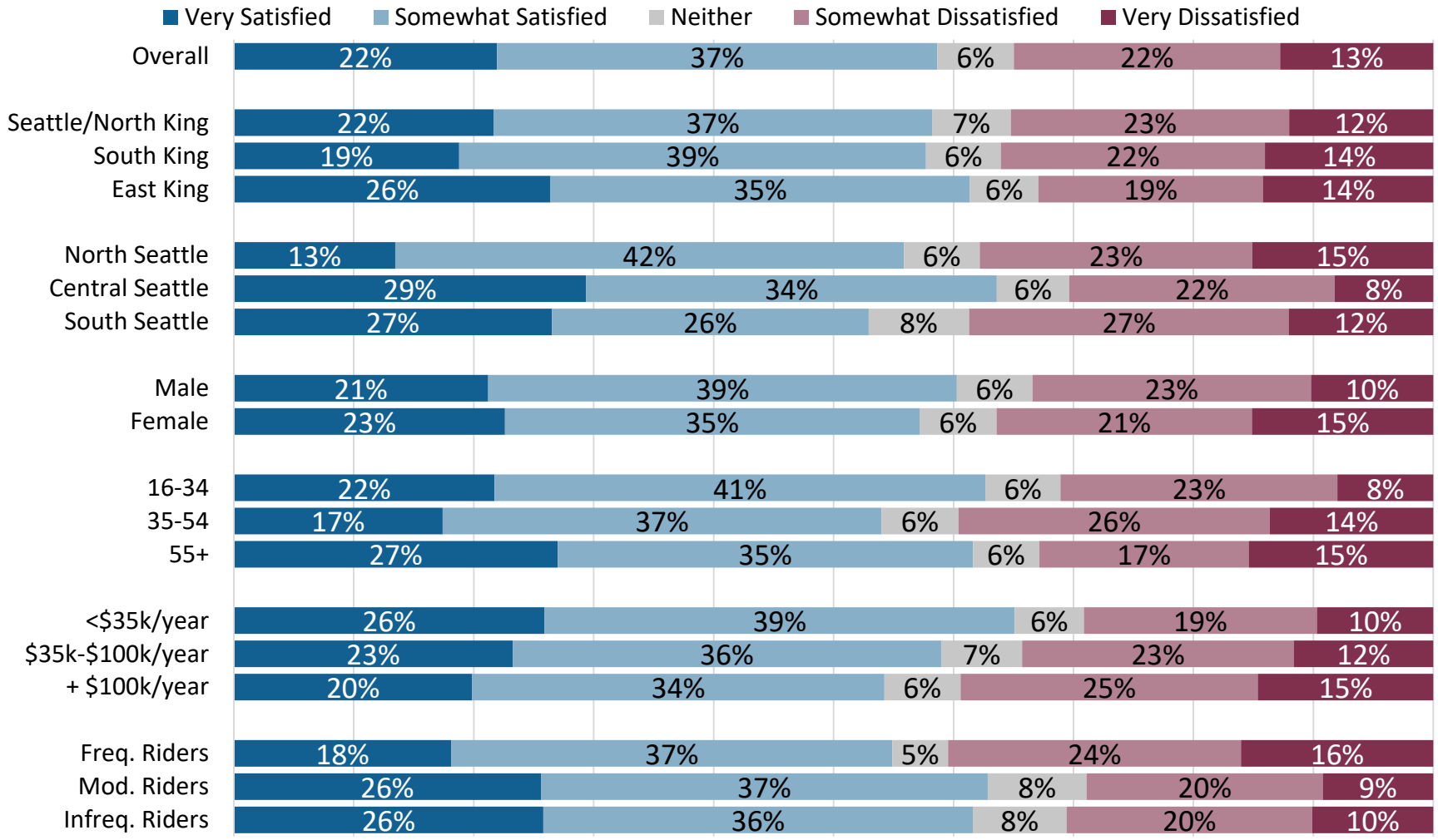


M7Q. Are you satisfied or dissatisfied with availability of seating at shelters and stops?

Overcrowding on Bus

[Strategically Target]

About one third of riders in each subgroup are dissatisfied with overcrowding, making it the lowest-rated element in the survey. However, due to its relatively low bearing on overall satisfaction – and the structural requirements of adding service and larger buses needed to address it – it's likely a less practical area of focus than other comfort and cleanliness elements. Note that the relatively less neutral description language used to test this item may inherently make it a lower-performing element than other items in the survey.



M7I. Are you satisfied or dissatisfied with overcrowding on the bus?

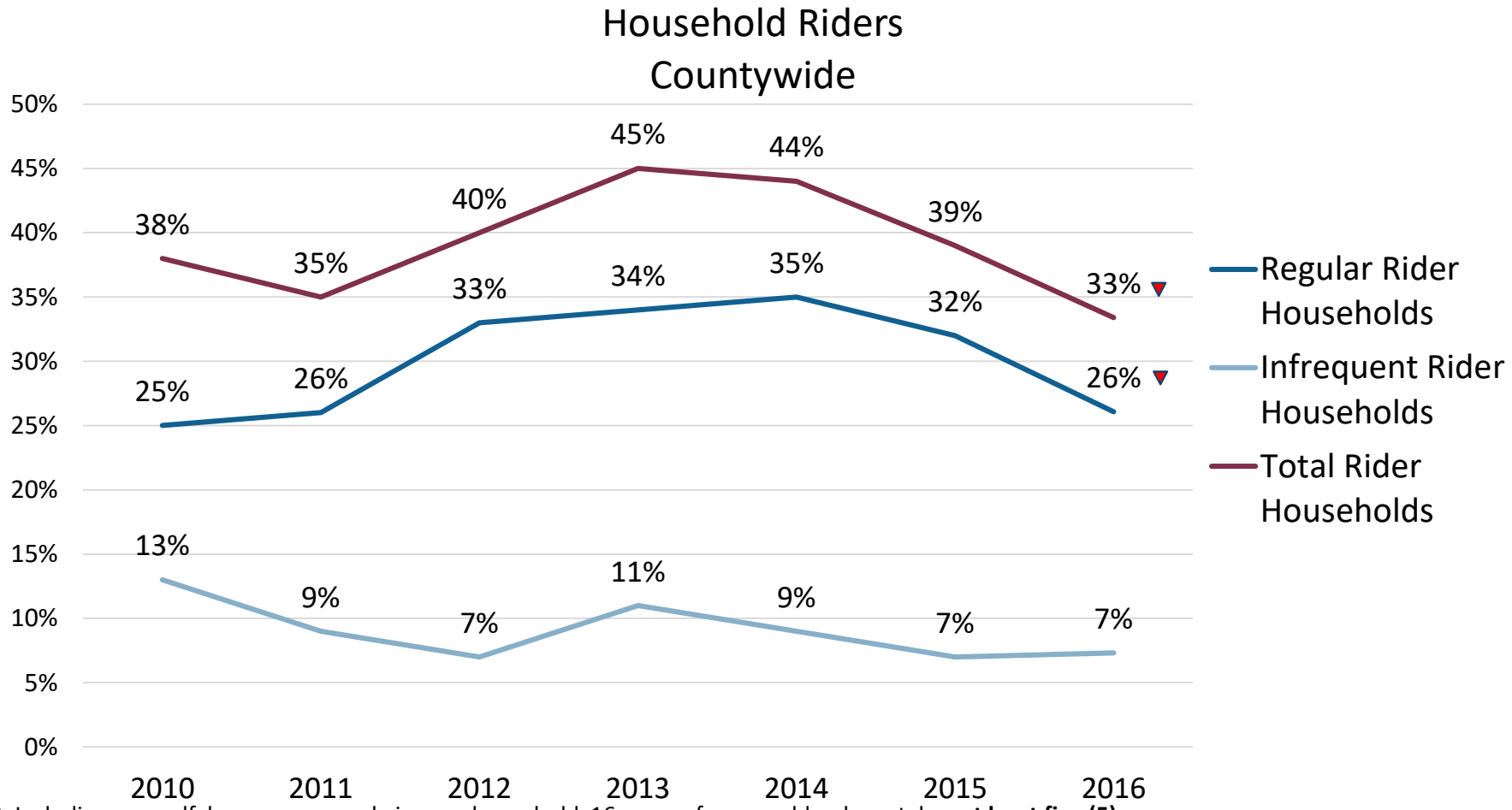
King County METRO

Marketshare

Household Marketshare - Countywide

The reported incidence of King County households with regular Metro bus riders has continued to drop over the last couple of years, returning to pre-2012 levels.

** Note: The 2016 survey was conducted in December which was later than in previous years, and December has low ridership. Also, 2016 was the first year of the extension of Link light rail to UW and Capitol Hill.*



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** in the last 30 days? A round trip counts as two (2) rides.

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** in the last 30 days?

Household Marketshare – Year-to-Year

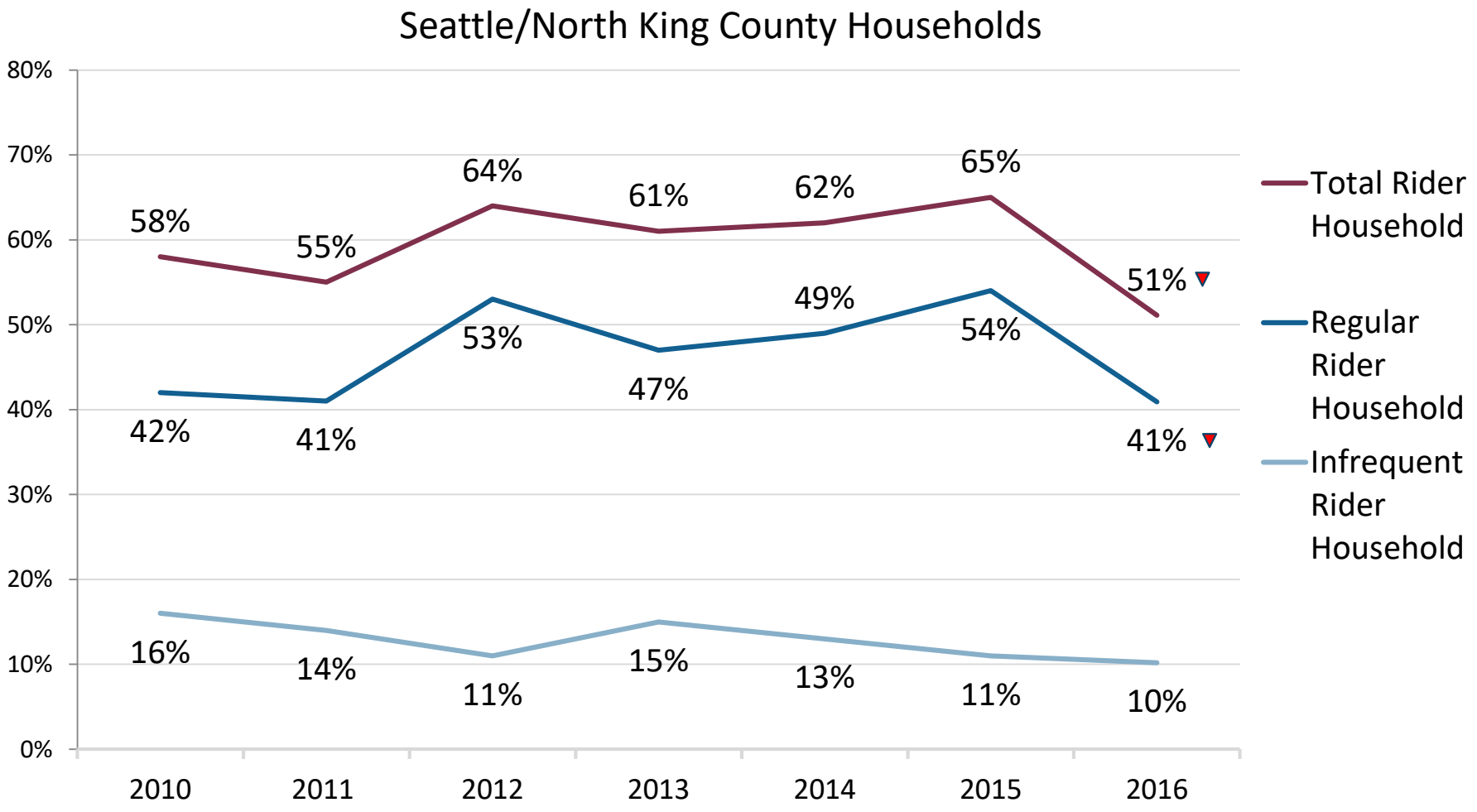
The household share of riders is lower in the 2016 survey, putting it on-par with 2011 levels. Most of this fluctuation is in the reported share of regular riders as the infrequent rider share is roughly the same as previous years.

	Household Type	
	Total Rider	Non-Rider
2016	33% ▼	67% ▲
2015	39%	61%
2014	44%	56%
2013	45%	55%
2012	40%	60%
2011	35%	65%
2010	38%	62%
	Regular Rider	Infrequent Rider
2016	26% ▼	7%
2015	32%	7%
2014	35%	9%
2013	34%	11%
2012	33%	7%
2011	26%	9%
2010	25%	13%

S4A&S4B. Including yourself, how many people in your household, 16 years of age or older, have taken **at least five (5)** / **between one (1) and four (4)** one-way rides on a **Metro bus** in the last 30 days? A round trip counts as two (2) rides.

Household Marketshare in Seattle/North King

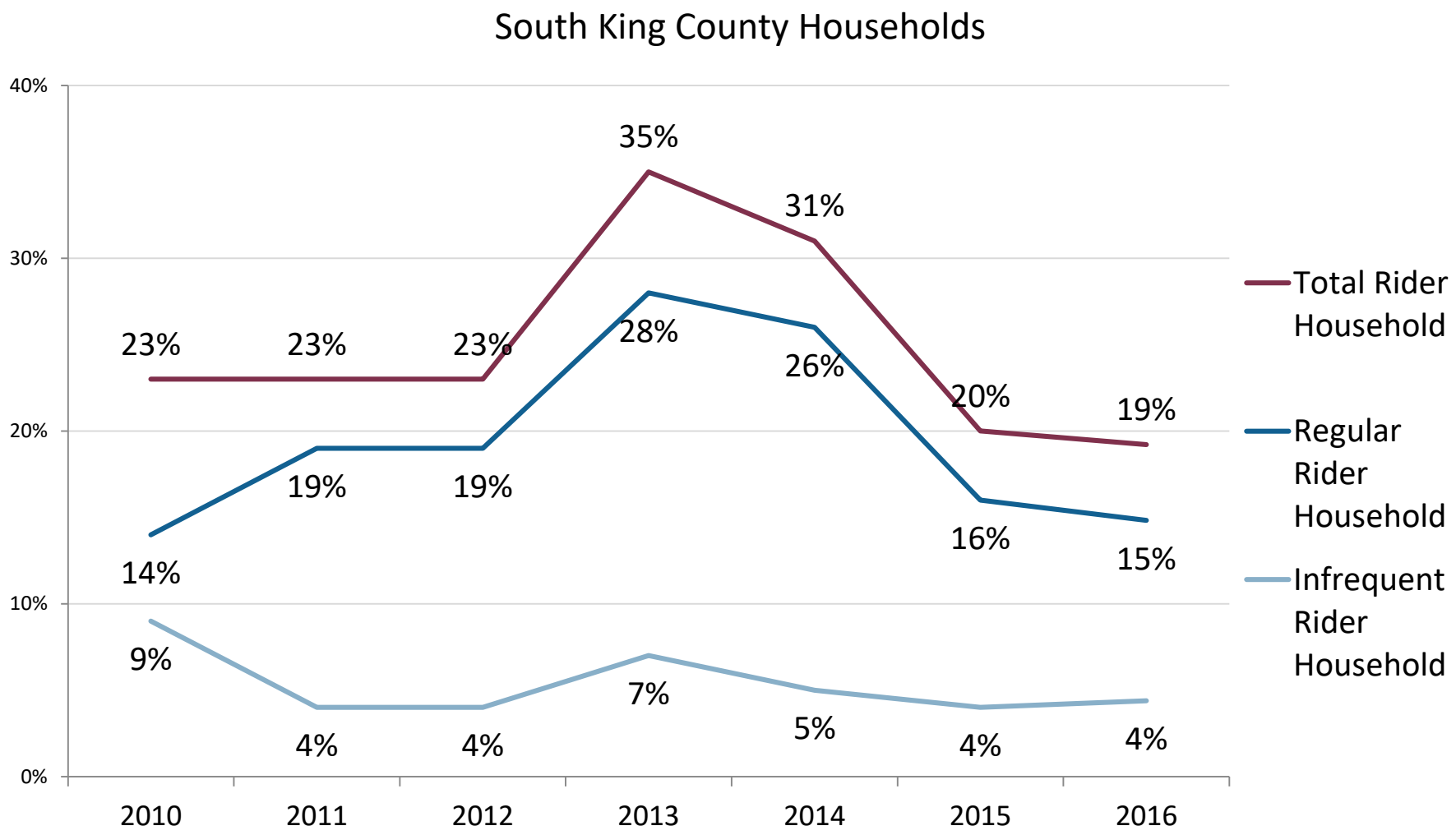
While nearing two-thirds rider share between 2012 and 2015, Seattle/North King County's household rider share is lower in 2016.



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** in the last 30 days? A round trip counts as two (2) rides.
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** in the last 30 days?

Household Marketshare in South King

After peaking in 2013, the household rider share has fallen over the last two years.

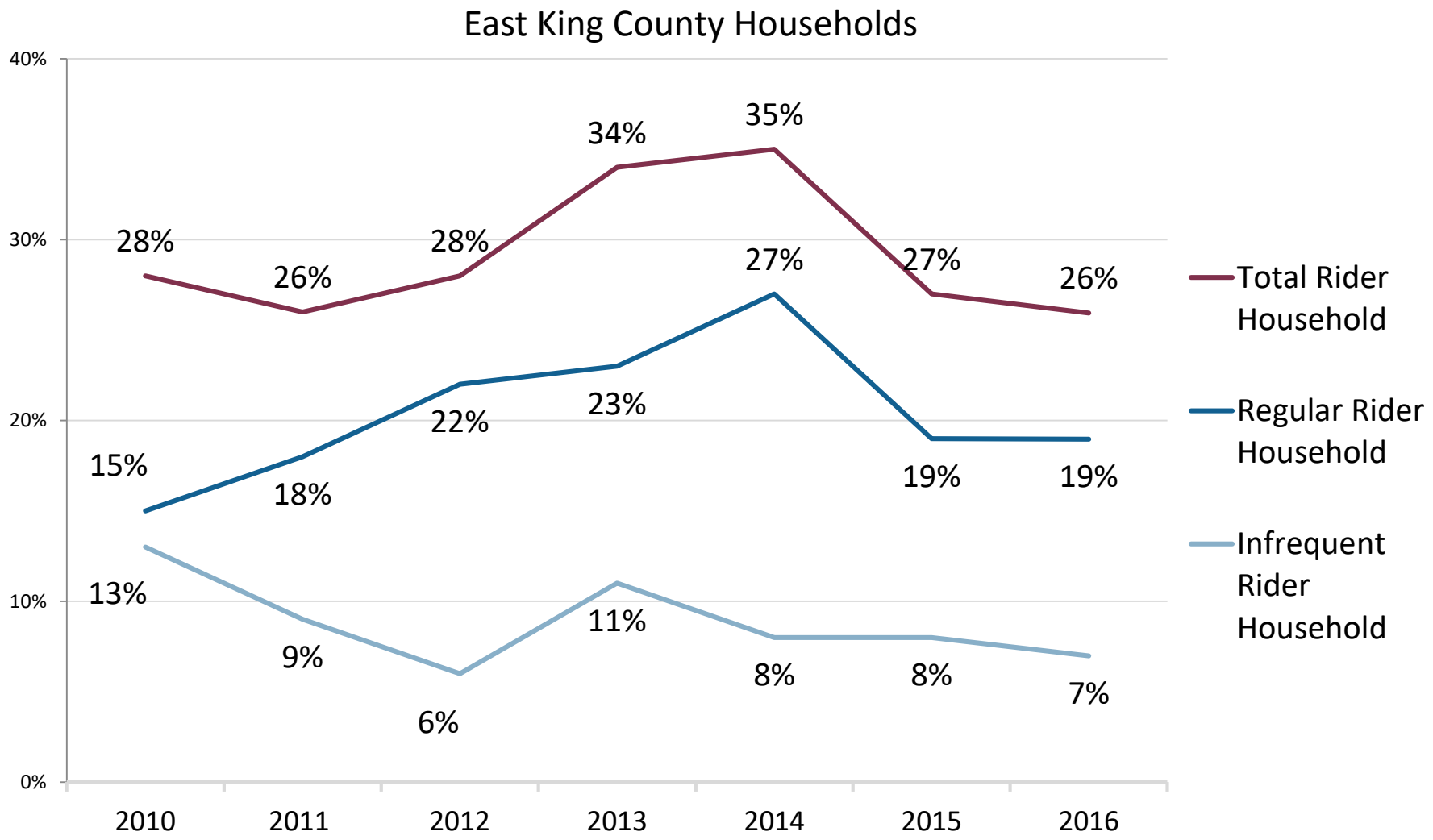


S4B. Including yourself, how many people in your household, 16 years of age or older, have taken **at least five (5)** one-way rides on a **Metro bus** in the last 30 days? A round trip counts as two (2) rides.

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** in the last 30 days?

Household Marketshare in East King

East King household rider share is steady with 2015, though both have dropped from the 2014 peak.



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** in the last 30 days? A round trip counts as two (2) rides.

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** in the last 30 days?

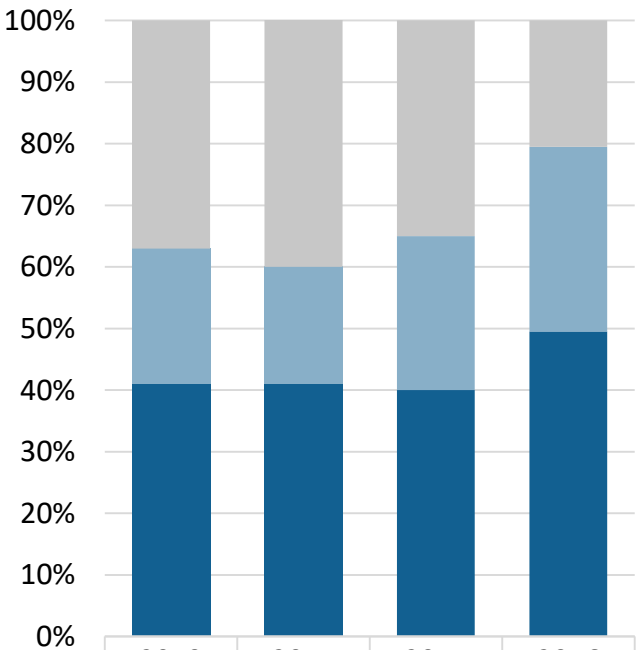
King County METRO

Rider Behavior Profile

One Way Rides – Year-to-Year

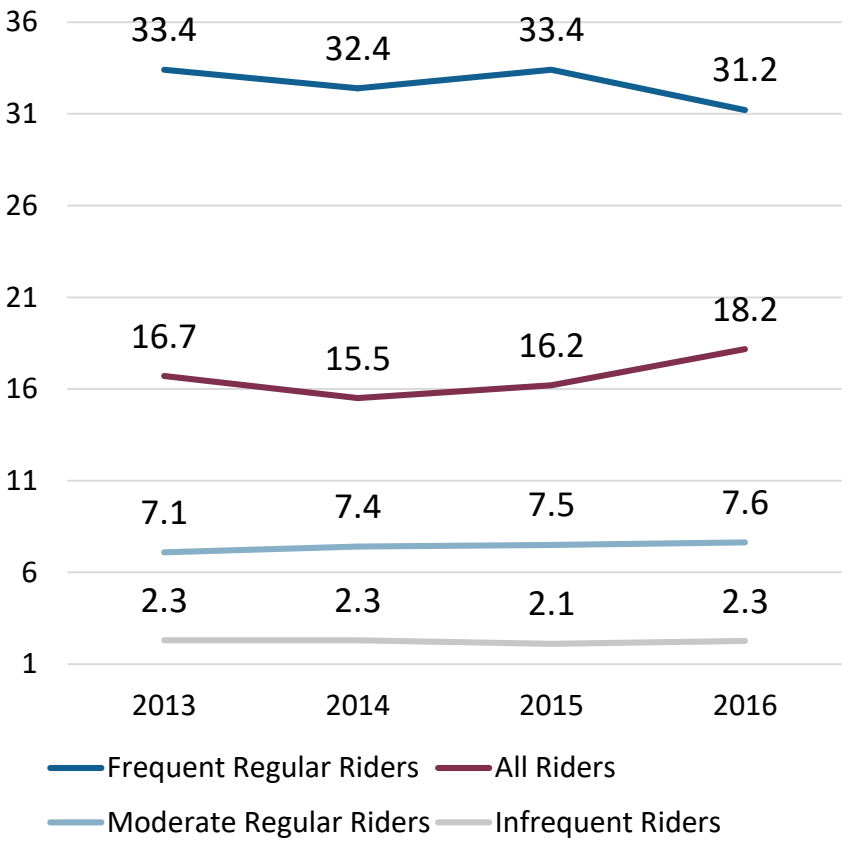
2016 saw a higher proportion of regular riders than in previous years while the average number of monthly one-way trips has increased among overall riders.

Rider Segments



	2013	2014	2015	2016
Infrequent Rider	37%	41%	35%	21% ▼
Moderate Regular Rider	22%	19%	25%	30% ▲
Frequent Regular Rider	41%	41%	40%	50% ▲

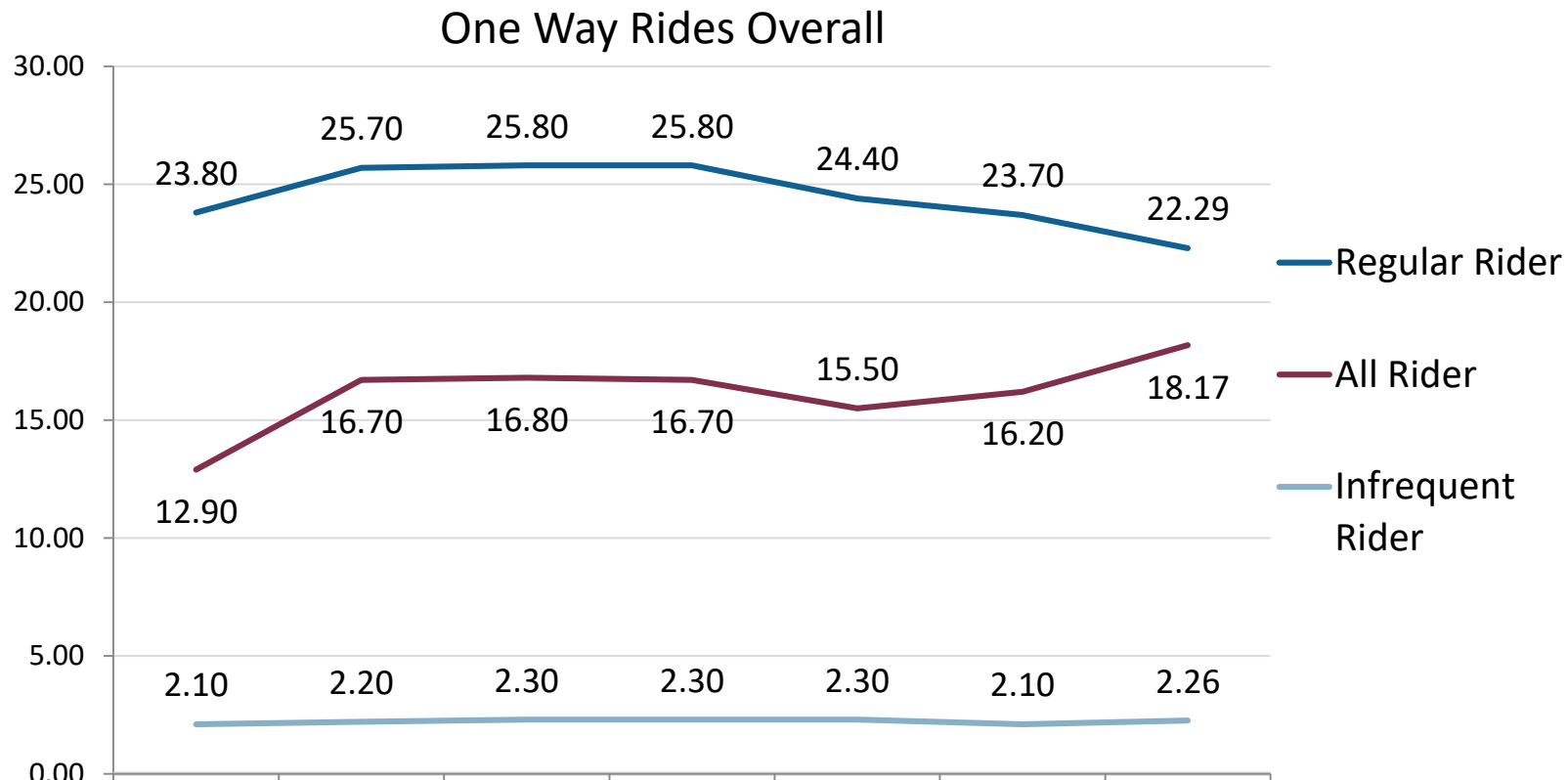
Number of One-Way Trips (Month)



S5A. Thinking about the last 30 days, how many **one-way rides** have **you** taken on a **Metro bus**? A round trip counts as two (2) one-way rides. For example, if you commuted to and from work five (5) days a week on a Metro bus, that would be two (2) trips per work day, which would be about 40 rides for the month.

All Riders: Trends in Riding Frequency

The average reported number of rides among frequent riders has been gradually declining over the last few years while the average number of rides among infrequent riders has remained steady.

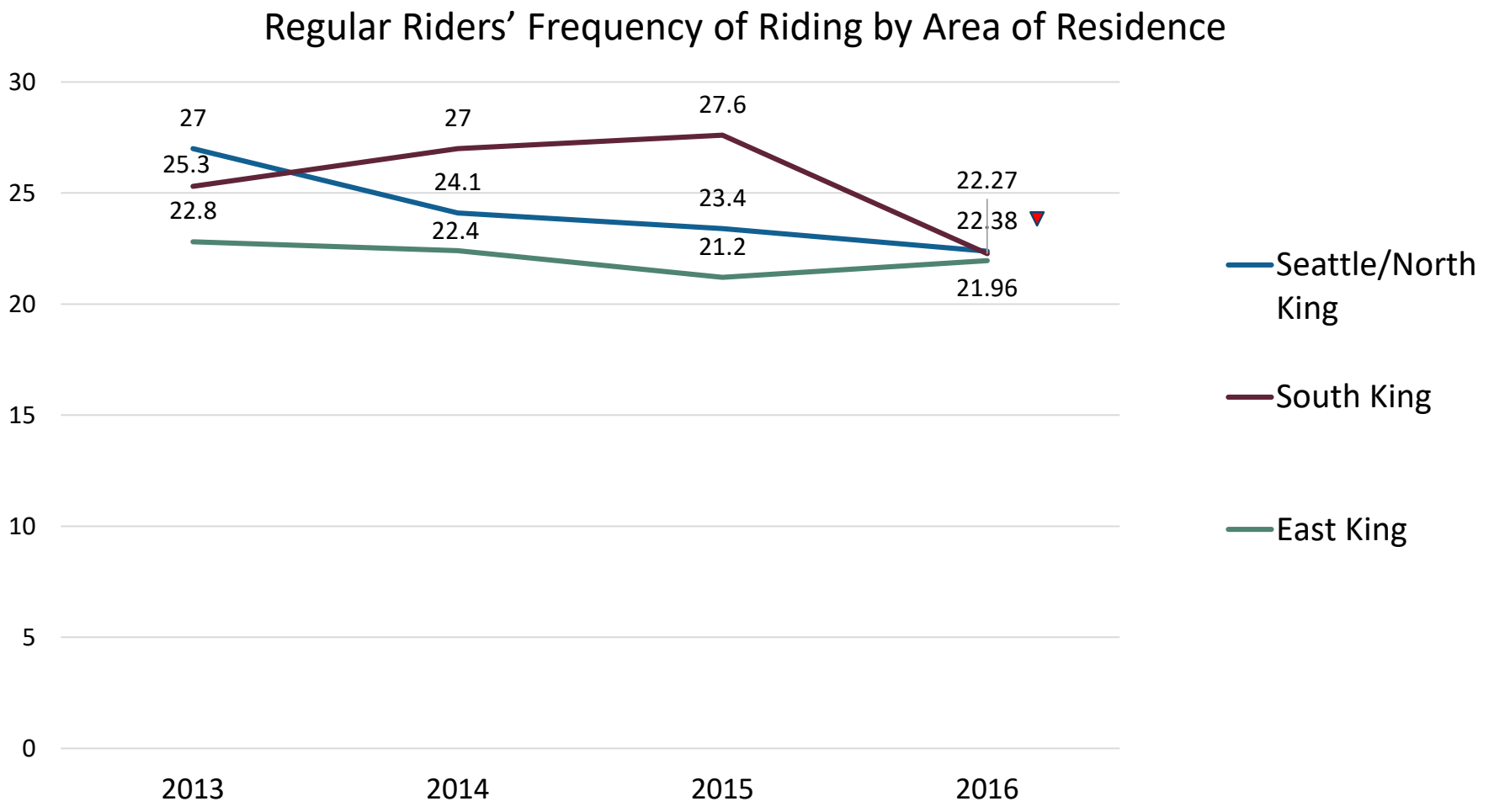


	2010	2011	2012	2013	2014	2015	2016
Regular Rider	23.80	25.70	25.80	25.80	24.40	23.70	22.29
All Rider	12.90	16.70	16.80	16.70	15.50	16.20	18.17
Infrequent Rider	2.10	2.20	2.30	2.30	2.30	2.10	2.26

S5A. Thinking about the last 30 days, how many **one-way rides** have **you** taken on a **Metro bus**? A round trip counts as two (2) one-way rides. For example, if you commuted to and from work five (5) days a week on a Metro bus, that would be two (2) trips per work day, which would be about 40 rides for the month.

One Way Trips by Region

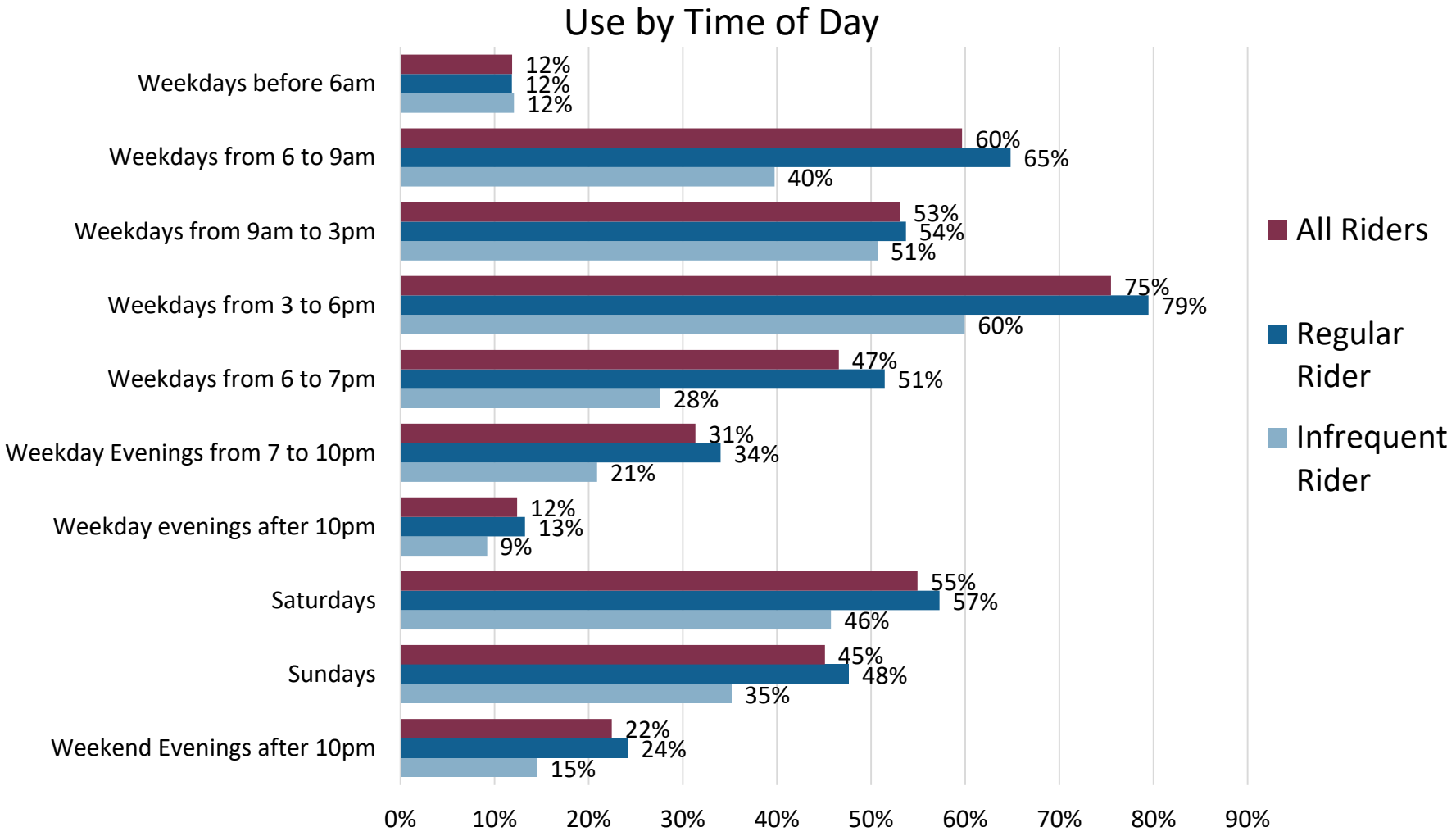
There was lower geographic fluctuation in reported ride frequency in 2016.



S5A/S6A Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus?

Ridership by Daypart

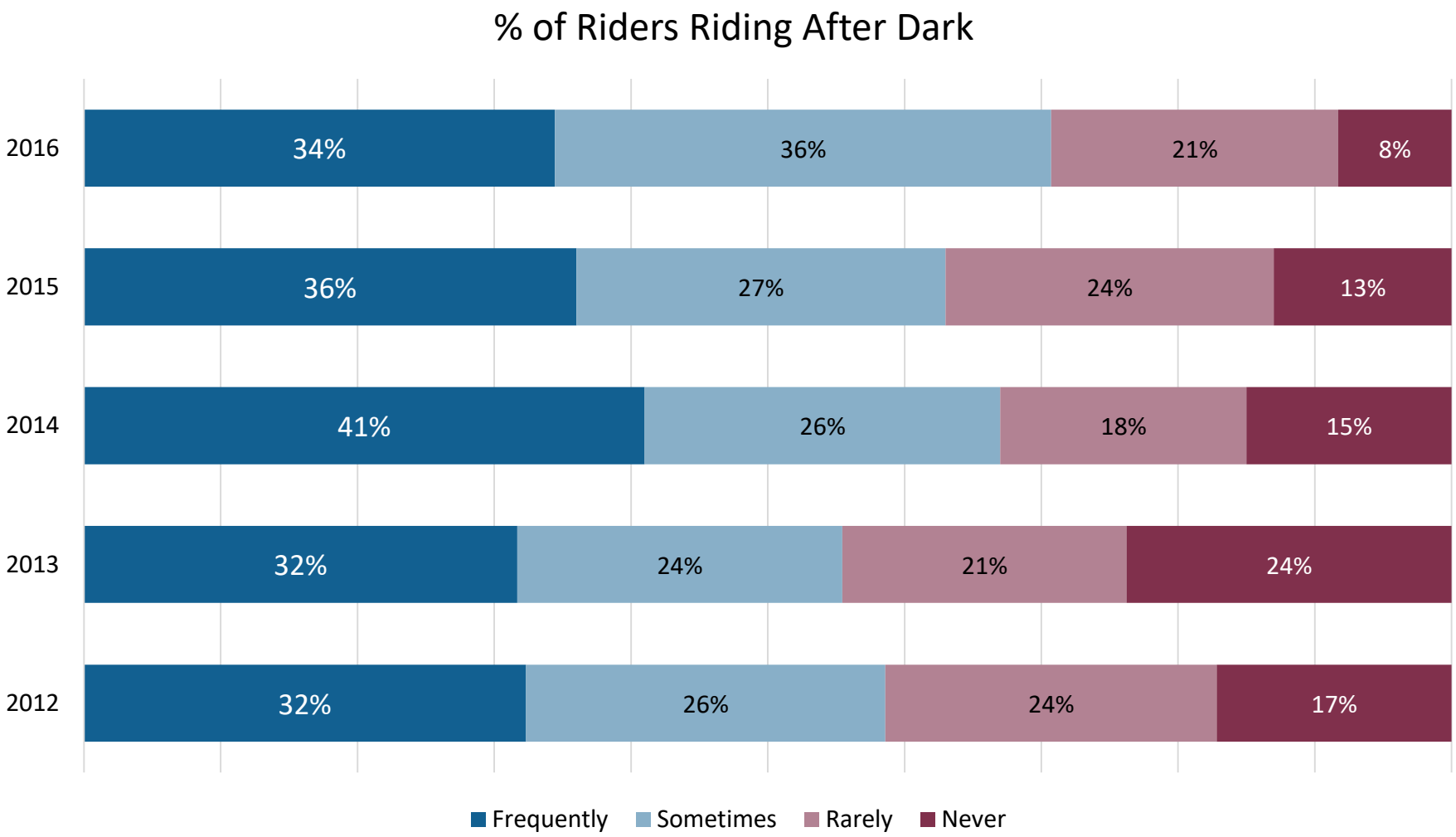
Regular riders are far more likely to ride during weekday morning and evening peak periods and somewhat more likely to ride on weekends than infrequent riders. Early morning, mid-day and late evening usage is similar across both groups.



M6. Do you ride…

Daypart Usage - After Dark

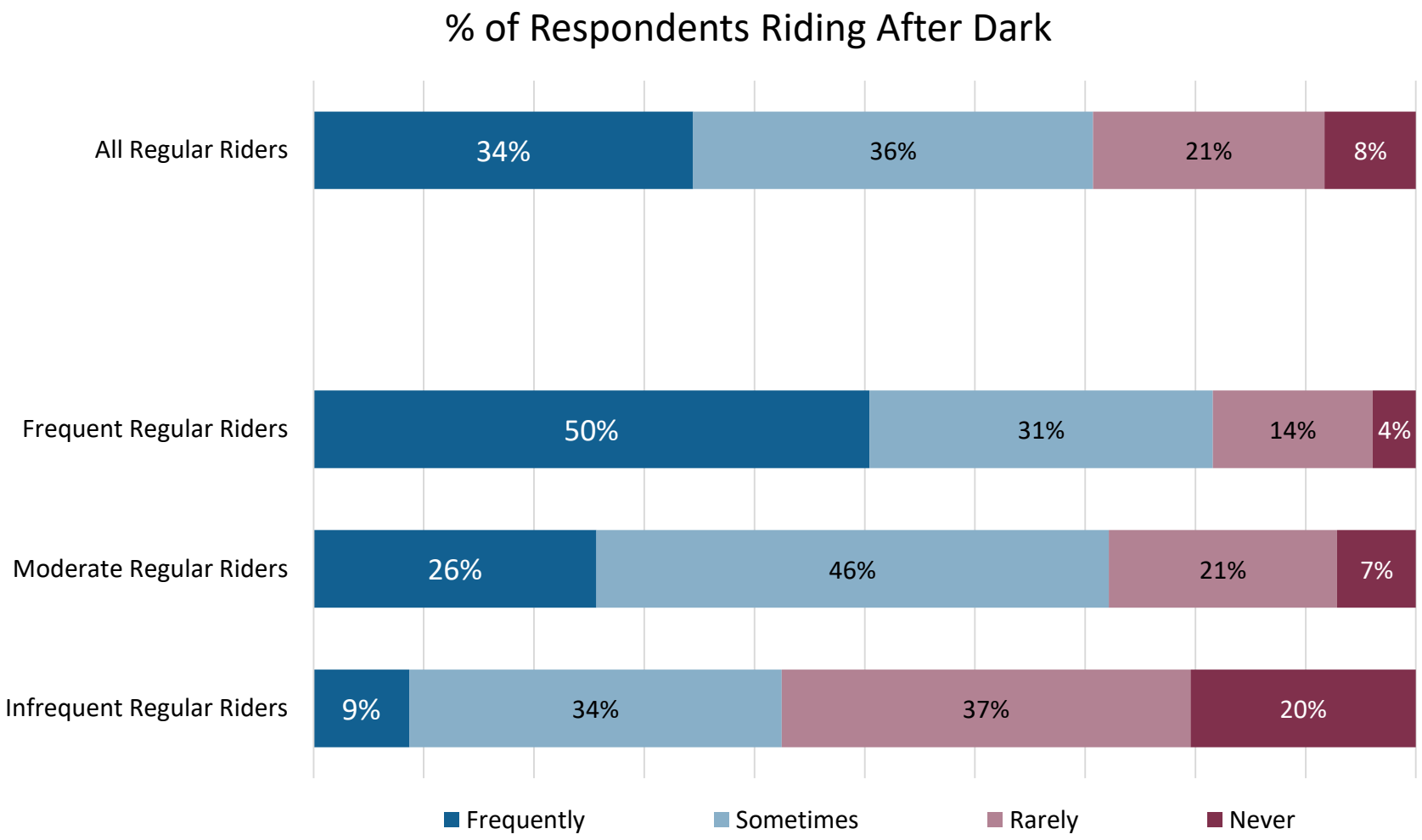
Nighttime riding frequency has been higher the last few years than in the years prior.



PS1A. In the past year, how often have you ridden the bus when it is dark?

Daypart Usage - After Dark

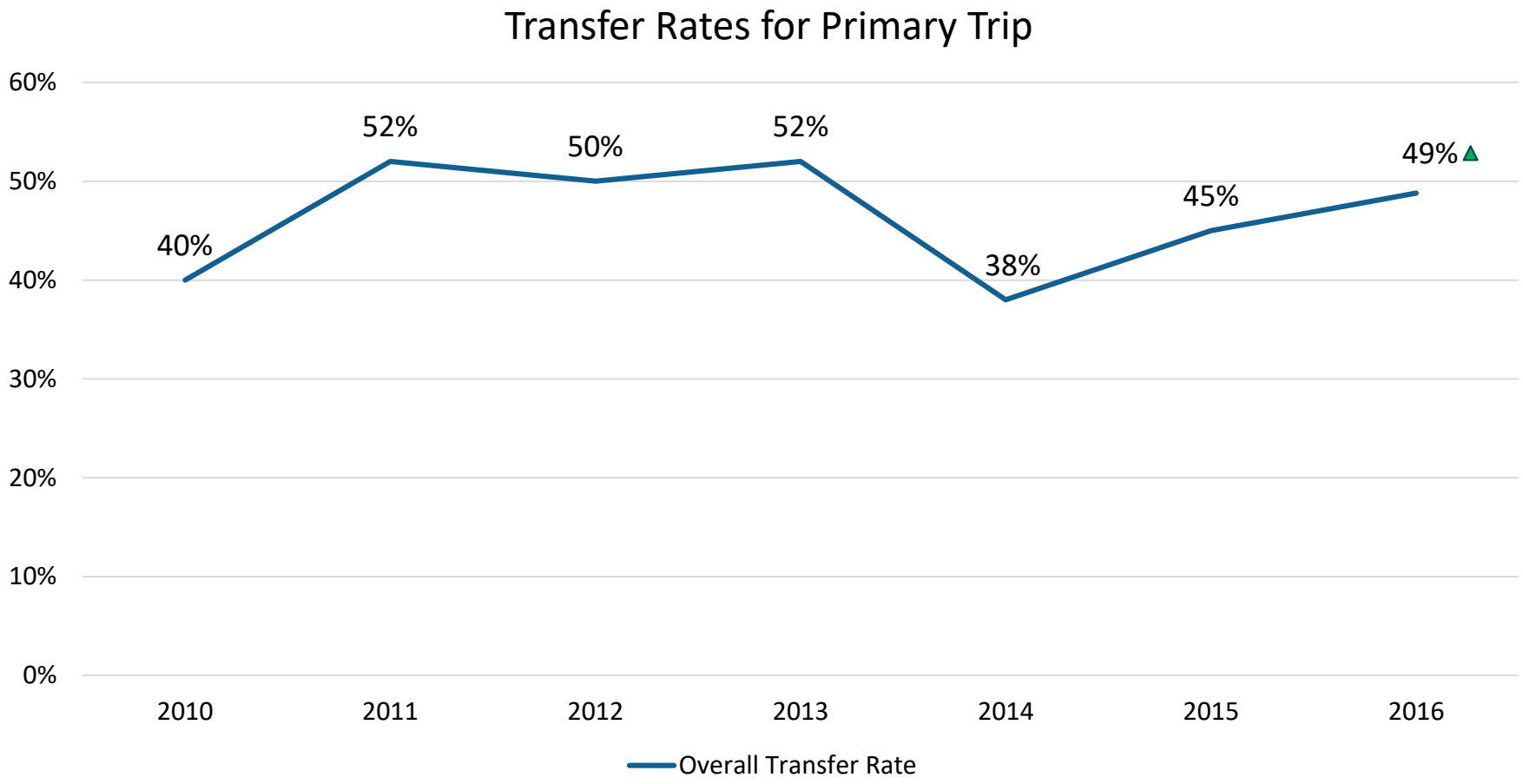
Frequent riders are far more likely to ride at night than infrequent riders



PS1A. In the past year, how often have you ridden the bus when it is dark?

Transfers

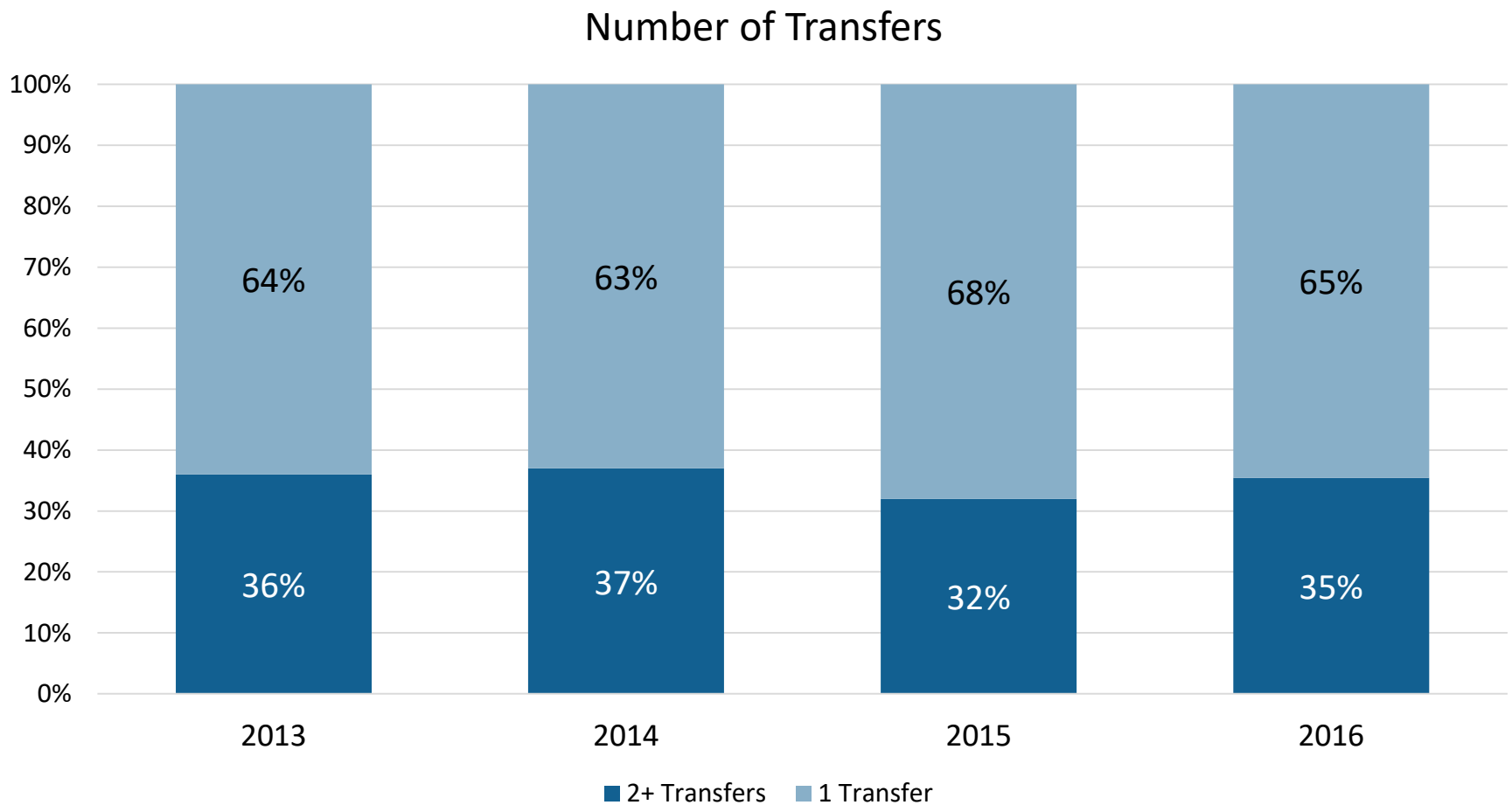
While up slightly from 2014 and 2015, the reported share of Metro riders who make at least one transfer for the transit trip they take most often is on-par with previous years.



TRIPx5A. How many transfers do you usually make on the trip you take most often?

Transfers: Year-to-Year

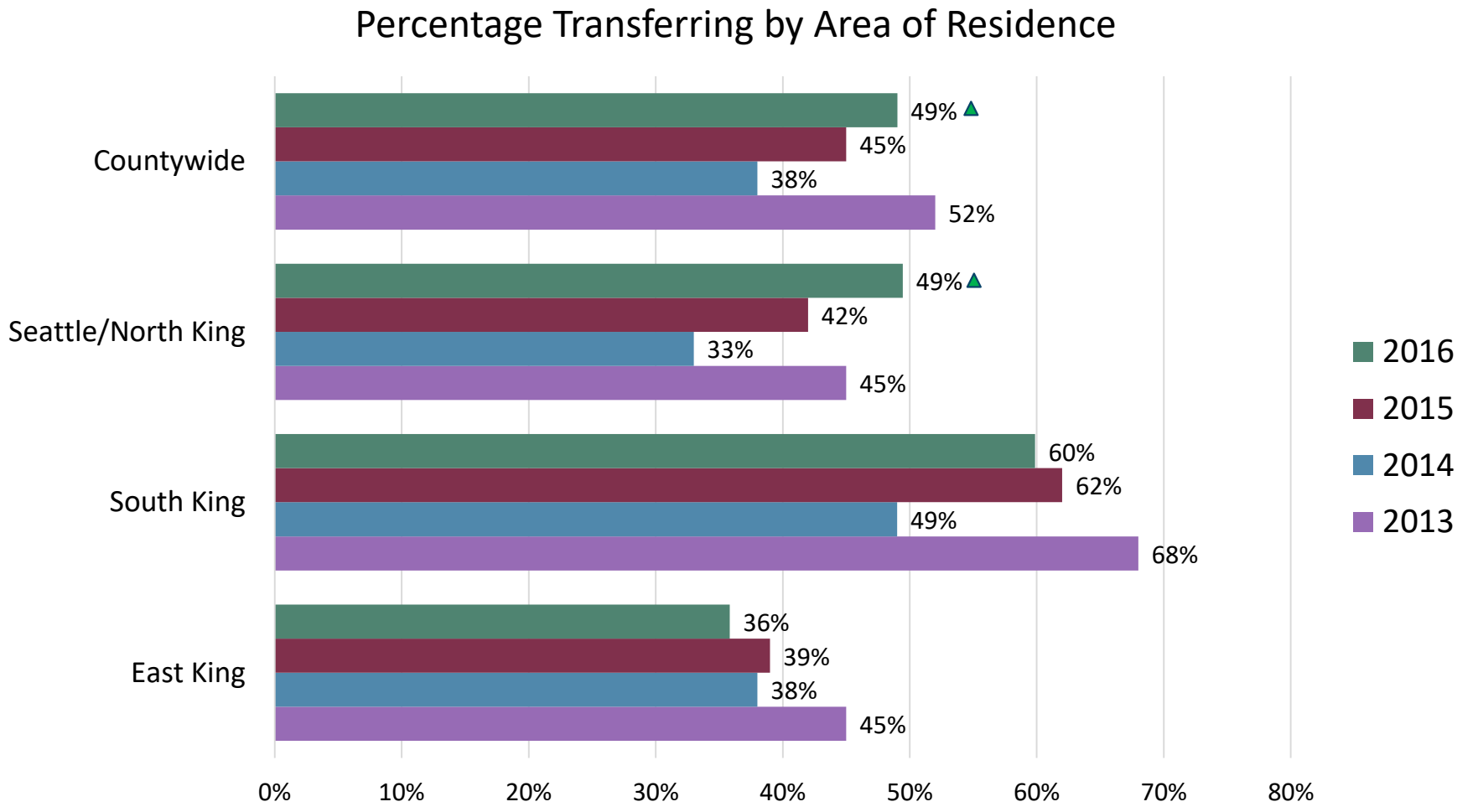
The proportion of single versus multiple transfers has remained consistent with previous years.



TRIPx5A. How many transfers do you usually make on the trip you take most often?

Transfers

As in previous years, South King riders report transferring at a greater rate than riders in other areas. East King riders still have the lowest transfer rates for their most frequently-taken trip.

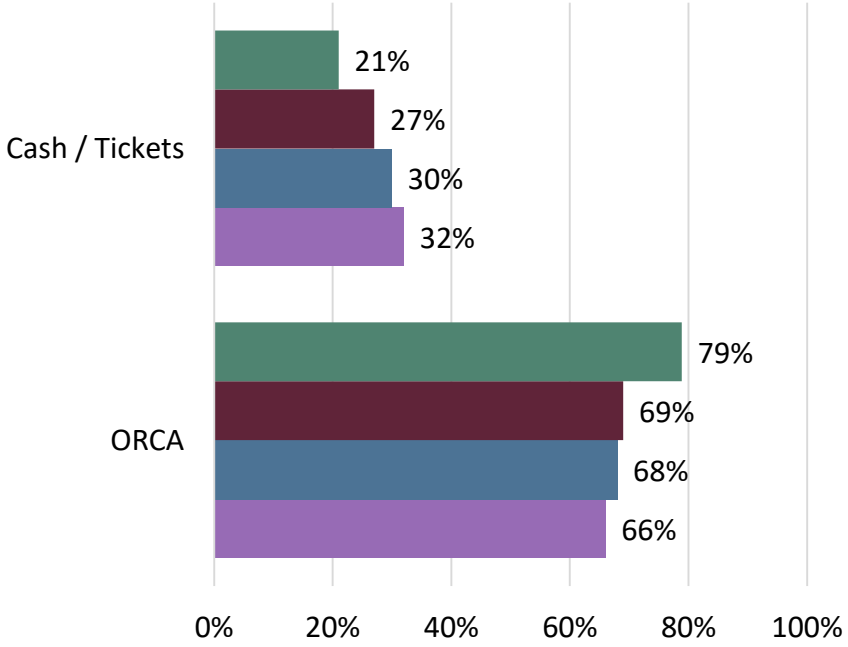


TRIPx5A. How many transfers do you usually make on the trip you take most often?

Fare Payment

About three-quarters of riders report using an ORCA card – either purchased by themselves or employers -- as their primary method of fare payment in 2016. This is up from previous years.

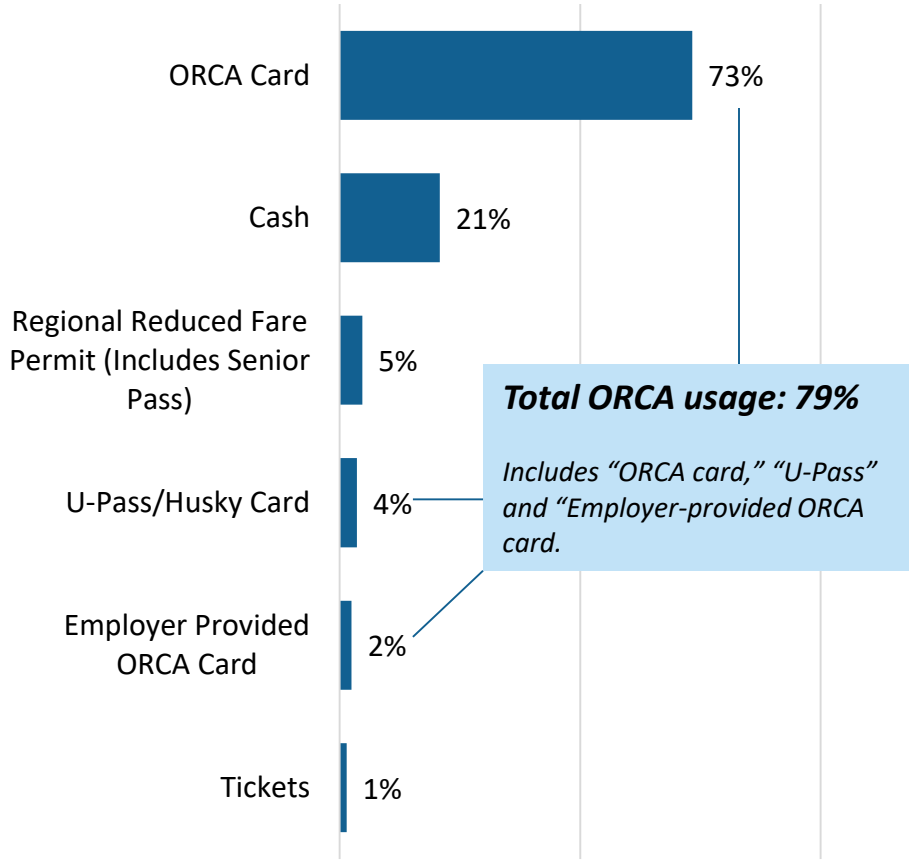
Fare Payment Method over Time



	ORCA	Cash / Tickets
2016	79% ▲	21% ▼
2015	69%	27%
2014	68%	30%
2013	66%	32%

** Note: In 2016, this ORCA category includes the "ORCA card," "U-Pass" and "Employer Provided ORCA card" options.*

Fare Payment Breakdown



F0. How do you usually pay your bus fare? Do you use an ORCA card, cash, tickets or something else? ***(Multiple Response)***

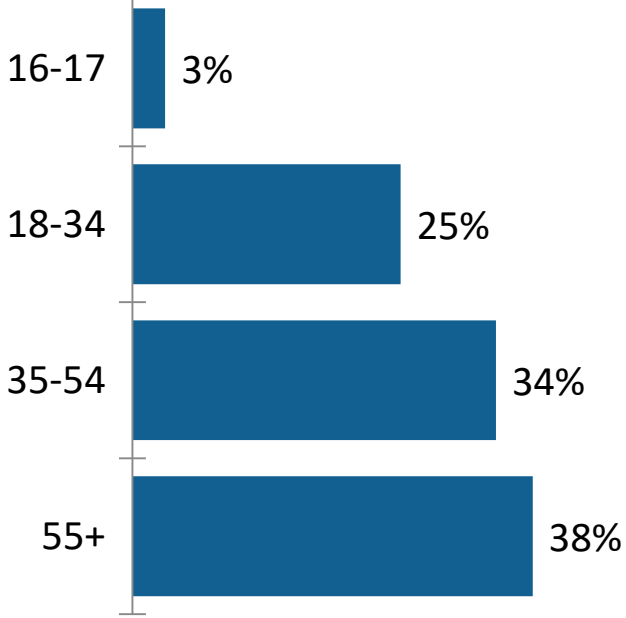
King County METRO

Rider Demographic Profile

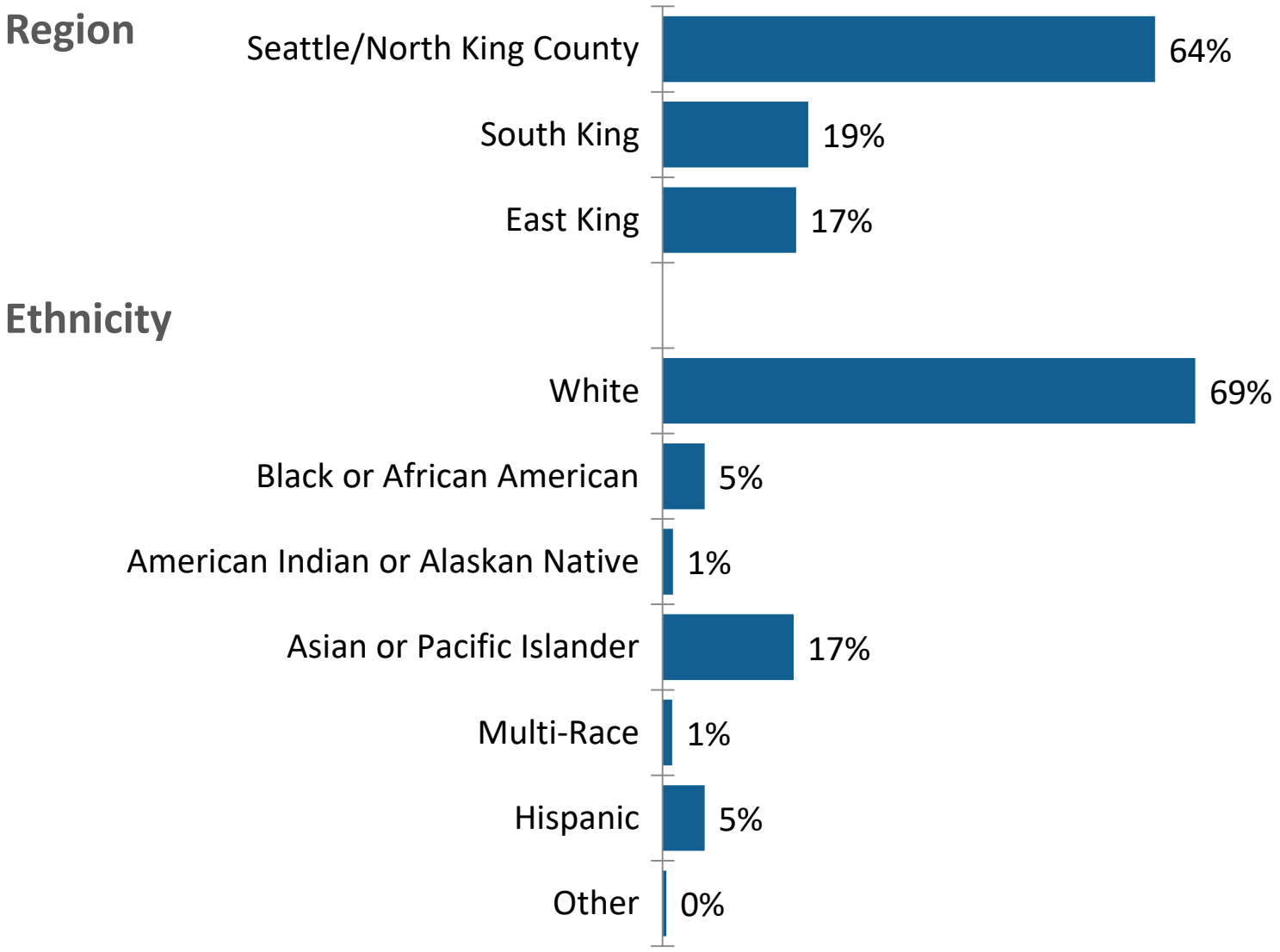
Key Respondent Demographics

Gender

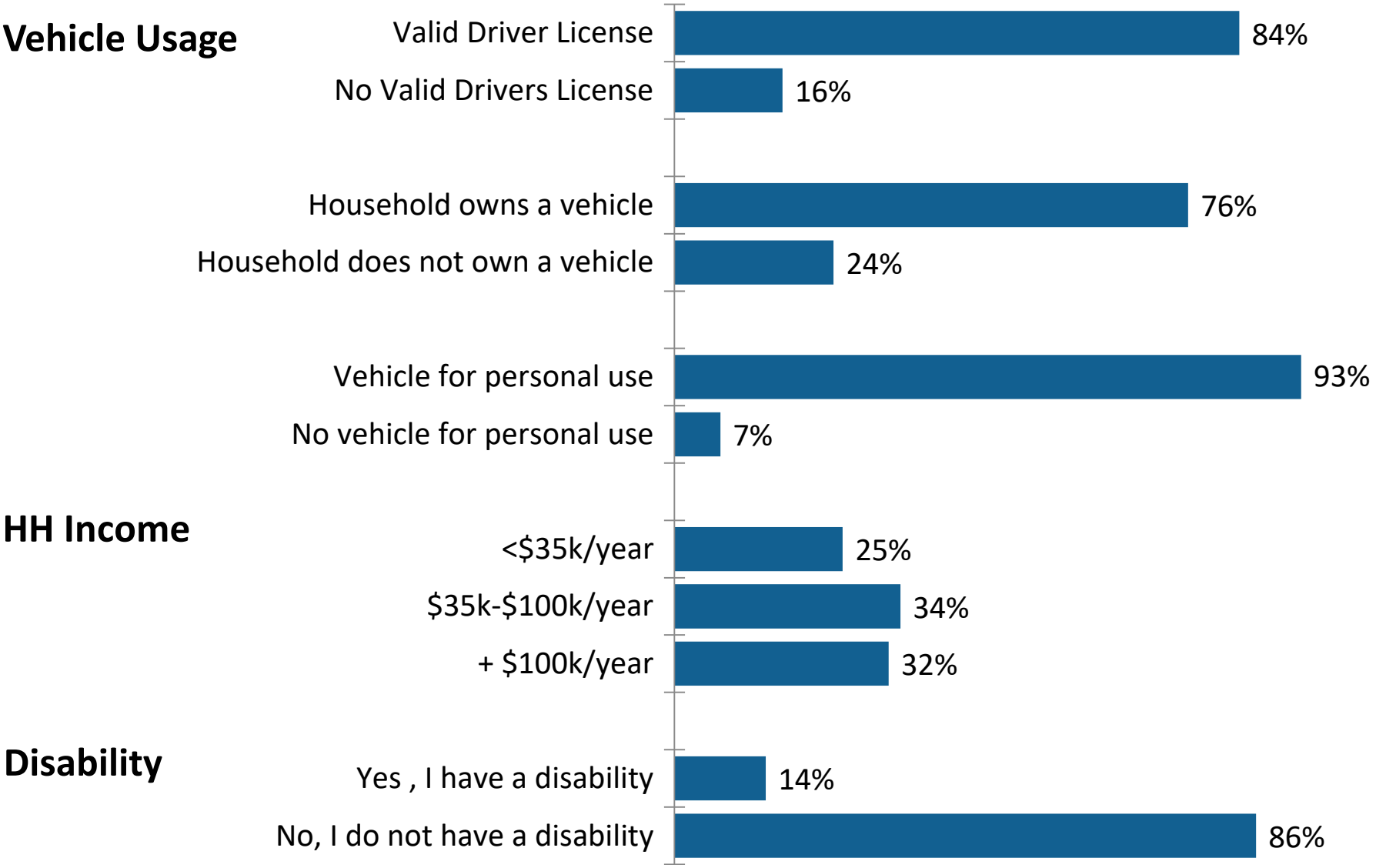
Age



Key Respondent Demographics



Key Respondent Demographics



Demographics by Sub-area

	Overall	Seattle/North King	South King	East King
Male	48%	47%	47%	53%
Female	52%	53%	53%	47%
16-17	3%	1%	9%	4%
18-34	25%	26%	28%	18%
35-54	34%	35%	28%	38%
55+	38%	38%	35%	40%
White	69%	72%	54%	73%
Black/African American	5%	5%	12%	0%
American Indian/ Alaskan Native	1%	1%	3%	2%
Asian or Pacific Islander	17%	14%	23%	21%
Mulit-Race	1%	1%	1%	0%
Hispanic	5%	5%	6%	4%
Other	0%	1%	0%	0%

Demographics by Sub-area

	Overall	Seattle/North King	South King	East King
Valid Driver License	84%	85%	79%	87%
No Valid Drivers License	16%	15%	21%	13%
Household owns a vehicle	76%	73%	83%	83%
Household does not own a vehicle	24%	27%	17%	17%
Vehicle for personal use	93%	94%	91%	93%
No vehicle for personal use	7%	6%	9%	7%
<$35k/year	25%	26%	30%	15%
$35k-$100k/year	34%	33%	40%	27%
+ $100k/year	32%	31%	21%	46%
Yes , I have a disability	14%	15%	12%	9%
No, I do not have a disability	86%	85%	88%	91%

King County
METRO

Weighting and Disposition Report

Weighting

To better approximate the larger universe of KC Metro riders, the final survey data was weighted by key demographics to reflect the most recent census counts for residential households in King County.

Weighting				
Neighborhood	**Unweighted**		**Weighted**	
	n	**%**	**n**	**%**
Geography – Overall				
Seattle/North King	881	27%	1282	39%
South King	1326	40%	1151	35%
East King	1081	33%	855	26%
Geography – Rider only				
Seattle/North King	400	50%	518	65%
South King	200	25%	149	19%
East King	200	25%	133	17%
Income				
Below $35,000 Per Year	119	15%	179	22%
Above $35,000 Per Year	597	75%	538	67%
DK/Ref	84	11%	83	10%
Cell phone reliance				
Only cell phone calls	263	33%	432	54%
Primarily cell phone calls	205	26%	144	18%
Use cell phone and landline equally	150	19%	112	14%
Primarily landline phone calls	76	10%	80	10%
Only landline phone calls	64	8%	32	4%
Age				
16-24	82	10%	104	13%
25-34	119	15%	120	15%
35-44	118	15%	128	16%
45-54	154	19%	144	18%
55-64	172	22%	160	20%
65+	148	19%	136	17%

Disposition Report

	Overall Count	Overall Percentage	Market: LL RDD Count	Market: Listed Cell Count	Market: ARV Cell Count	Market: Hisp ARV OS Count	Market: Asian ARV OS Count
Completed Interview	801	69.00%	276	138	138	56	72
No answer	14377	12.46%	9513	899	716	812	1000
Answering machine	13323	11.54%	2717	3503	2379	1309	1473
Busy	520	45.00%	380	40	41	21	13
Disconnected Phone	70084	60.73%	62751	852	611	1540	1619
Business/Government Phone	2569	2.23%	2251	63	72	62	43
Respondent not available	2216	1.92%	475	495	241	236	370
Soft Initial Refusal	3853	3.34%	1799	680	482	203	323
Hard Initial Refusal	127	0.11%	28	27	53	5	8
Computer Tone	1752	1.52%	1512	14	3	65	67
Language Problems	484	0.42%	112	21	16	63	181
Abandoned interview	47	0.04%	3	16	14	5	3
Hard Appointment	34	0.03%	5	6	8	3	2
Soft Appointment	420	0.36%	67	107	75	48	54
Change number	1	0.00%	0	0	0	0	0
Mid Interview Stop (Appointment)	49	0.04%	8	10	11	7	7
Over quota	18	0.02%	2	5	5	1	3
Wrong Num ber	247	0.21%	22	81	13	31	51
Break Off Termination	53	0.05%	20	7	9	8	4
Add To Do Not Call List	580	0.50%	264	128	82	32	34
Completed Interview	801	69.00%	276	138	138	56	72
Quit before Qualification	198	0.17%	74	37	23	20	18
TOTAL ATTEMPTS:		**115411**	**30679**	**6000**	**11219**	**1095**	**1836**
INCIDENCE:		**18.85%**	**83428**	**7823**	**5631**	**4795**	**5598**
INCIDENCE RATE:			**17.51%**	**17.18%**	**18.58%**	**19.22%**	**22.89%**
AVERAGE LENGTH:			**13.31**	**13.9**	**14.12**	**12.91**	**13.27**

Disposition Report (Cont.)

	Overall Count	Overall Percentage	Market: LL RDD Count	Market: Listed Cell Count	Market: ARV Cell Count	Market: Hisp ARV OS Count	Market: Asian ARV OS Count
TQ- NQ:S1A - Unwilling to participate	124	0.11%	22	21	21	22	17
TQ - NQ:S2A - No	430	0.37%	78	108	127	26	27
TQ - NQ:S2A - Don't Know/Refused	5	0.00%	2	2	1	0	0
TQ - NQ:S2A - Don't Know/Refused	16	0.01%	6	4	5	1	0
TQ - NQ:S2C - Invalid zip DK/REF	92	0.08%	36	11	14	6	11
TQ - NQ:S2C - Invalid zip	65	0.06%	31	7	13	5	3
TQ - NQ:S3A - DK/REF	46	0.04%	20	8	4	7	3
TQ - NQ:S3B - DK/REF	6	0.01%	5	0	0	0	0
TQ - NQ:S4A & S4B - DK/REF	9	0.01%	3	1	1	2	0
TQ - NQ:S3A - DK/REF	1	0.00%	0	0	0	0	0
TQ - NQ:HHRIDESTAT - Non-Rider Household	2259	1.96%	1061	353	213	150	163
TQ - NQ:RIDESTAT = 3 & S4A = O	25	0.02%	6	7	3	4	2
TQ - NQ:SEL3 - Infrequent Rider Unwilling	25	0.02%	7	5	4	2	2
TQ - NQ:s7 series - all Route 500/2005 to 200	117	0.10%	44	29	17	8	5
TQ - NQ:INTRO - Not a King County Resident	438	0.38%	71	138	117	35	20