



# King County Metro Transit 2021 Rider and Non-Rider Survey Full Year Summary Report

*May 2022*

Research conducted for:  
Metro Transit Department



**Prepared for:**

King County Metro Transit Department

**Research conducted by:**

EMC Research

Brian Vines, Director

Aaron Kelley, Director

Andrew Thibault, Senior Principal

**For comments or questions contact:**

Claire Evans, PhD

Research Specialist

[clevans@kingcounty.gov](mailto:clevans@kingcounty.gov)

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# **Executive Summary**

# Executive Summary

- ▶ Throughout 2021, two-thirds of King County residents rated Metro favorably, compared to less than one-in-five who rated the agency unfavorably. Another one-in-five had no opinion.
- ▶ Respondents who had ridden Metro at least once in the last 30 days at the time of the survey gave the service high marks. In 2021, satisfaction among this group was near pre-pandemic levels (89% satisfied in 2021 compared to 88% in 2019), and the positive intensity of their ratings have strengthened (from 30% “very satisfied” in 2019 to 36% in 2021).
  - Note: Beginning in Q4 2020, Metro usage and satisfaction questions were asked of occasional riders (those who currently ride but not in the last 30 days) and lapsed riders (former monthly riders who stopped riding since the pandemic began). Previous iterations of the survey asked these questions only of those who rode Metro in the last 30 days. Results highlighted in this report focus on **current riders**.
- ▶ Metro’s household market share rebounded throughout 2021 but remained lower than pre-pandemic levels. Just under half of survey respondents (47%) reported having a rider in the household compared to two thirds (65%) before the onset of the novel COVID-19 pandemic (Q1 2020).
  - 19% of County residents were classified as lapsed riders – i.e., they reported traveling with Metro at least occasionally prior to the pandemic but do not currently use Metro services. Moving into 2022, there is opportunity for Metro to learn more about lapsed riders’ post-pandemic travel habits and behaviors as they continue to change.



- ▶ Analyses of the relationships between current riders' satisfaction with various service elements and their overall satisfaction with Metro highlighted:
  - Level of service, information, comfort and cleanliness, and transfers are potential areas for improvement. Satisfaction with these elements was lower compared to other service dimensions and each has a relatively stronger influence on overall satisfaction.
  - Personal safety appears to be an urgent area of focus. Satisfaction related to personal safety after dark – both on board and at stops – declined throughout the year while its influence on overall satisfaction increased.
  
- ▶ Among King County residents, barriers to ridership included perceptions that travel by bus takes too long (45%) or is not flexible enough (25%). A quarter of respondents (25%) also indicated concern about using transit during the pandemic.

**Objectives,  
Methodology &  
Regional Sub-areas**

# Survey Objectives

- ▶ Understand riders' **overall satisfaction with King County Metro Transit's services** over time
- ▶ Gauge riders' **satisfaction with various elements of bus services** (including time performance, level of service, safety, fare payment, transfers, comfort and cleanliness, and information)
- ▶ Identify demographic and geographic characteristics of riders and non-riders
- ▶ Identify how various groups within the countywide population use and engage with Metro services differently
- ▶ Gain insight into residents' perceptions of Metro as an agency, and how those sentiments change over time
- ▶ Understand COVID-19's impacts on ridership, commuting, and usage
- ▶ Measure Metro market share and usage over time, including post-pandemic ridership
- ▶ Gauge ridership barriers and potential transit interest among lapsed riders, infrequent riders, and non-riders



# Overview of Survey Methodology

- ▶ Random Address-Based Sampling (ABS):
  - Postcards mailed to sample of residential postal addresses in the King County Metro service area. ABS sampling frame includes at least 99 percent of all residential households.
- ▶ Multi-modal survey with online and telephone options
- ▶ Surveys administered quarterly during the following windows:
  - March 5 – April 7, 2021; **2,420** total countywide survey responses; margin of error:  $\pm 2.0$  percentage points
  - May 24 – July 6, 2021; **2,161** total countywide survey responses; margin of error:  $\pm 2.1$  percentage points
  - August 30 – October 13, 2021; **1,817** total countywide survey responses; margin of error:  $\pm 2.3$  percentage points
  - December 3, 2021 – January 10, 2022; **1,939** total countywide survey responses; margin of error:  $\pm 2.2$  percentage points
- ▶ In 2021, a total of **8,337** county residents responded to the survey; total sample margin of error:  $\pm 1.1$  percentage points
  - Margin of error refers to the observational error associated with surveying a subset of a larger population. The documented margin of error for this survey leaves us confident that if the entire King County resident population were surveyed, we would expect with 95% confidence that the results would fall within a range of 1.1% above or below the measured response.
- ▶ Average survey completion time, all respondents: 19.1 minutes
  - Average survey completion time, riders: 24.4 minutes
  - Average survey completion time, non-riders: 14.8 minutes
- ▶ Survey and invitation materials available in multiple languages: English, Spanish, Traditional Chinese, Somali, and Vietnamese.

# Sampling and Response

- ▶ **126,000** invitation postcards sent to a randomly selected sample of King County residential addresses. To capture larger shares of riders in South King and East King, oversamples were administered in those regions. Distribution was as follows:
  - 28,000 invitations sent to Seattle/North King County addresses
  - 54,500 invitations sent to South King addresses
  - 43,500 invitations sent to East King County addresses
  
- ▶ Total response rate: 6.62%
  - Seattle/North King: 2,157 interviews; 7.70% response rate
  - South King: 3,130 interviews; 5.74% response rate
  - East King: 3,050 interviews; 7.01% response rate
  
- ▶ Of the **8,337** respondents who responded to the survey in 2021:
  - **254** requested to complete interview over phone; **55** surveys completed via phone with **134** incomplete phone interviews.
  - Across both modes, **484** respondents terminated based on the screening questions; **7,676** partially completed surveys.

- ▶ Responses were weighted by key demographics to reflect the most recent American Community Survey (ACS) estimates for residential households in the King County Metro service area.
- ▶ Data were stratified into three regions and then weighted using ACS estimates for all residents, including riders and non-riders.
  - Results are weighted to reflect the age, gender, income, ethnicity, household language, and geography breakdowns according to ACS estimates.
  - The dataset was also weighted to set each quarter's weighted sample equal to one another to ensure that different response rates by quarter do not influence yearly results.
  - 8,337 total interviews were conducted over the course of 2021. The weighted sample n of 6,110 reflects the expected proportional sample size that would have been accomplished without oversampling respondents in South King and East King.

- ▶ Interviews were stratified across three regional subareas: Seattle/North King (2,136n weighted), South King (2,198n weighted) and East King (1,775n weighted) County. Respondents were classified into four key ridership categories:
  - **Regular + Infrequent Riders (1,073n weighted)** – Current riders defined as King County residents, 16 or older, who made at least one transit trip on a Metro bus or streetcar in the last 30 days.
  - **Lapsed (1,190n weighted)** – Non-rider subgroup defined as King County residents, 16 or older, who did not make any transit trips on a Metro bus or streetcar in the last 30 days but had previously used Metro at least once a month before the COVID-19 pandemic.
  - **Occasional (971n weighted)** – Non-rider subgroup defined as King County residents, 16 or older, who did not make any transit trips on a Metro bus or streetcar in the last 30 days and had previously used Metro only occasionally before the COVID-19 pandemic.
  - **Never (2,876n weighted)** – Non-rider subgroup defined as King County residents, 16 or older, who did not take any rides on a Metro bus in the last 30 days and never used Metro before the COVID-19 pandemic

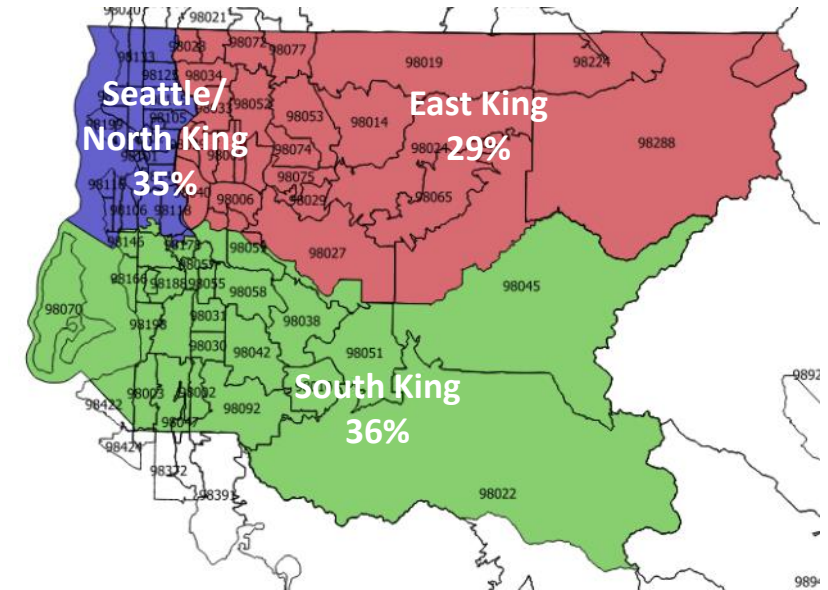
# Considerations and Caveats

- ▶ Inviting respondents by mail and providing options to participate in an online or telephone survey is designed to include residents who may be unreachable by telephone or email alone.
- ▶ Invitation materials described the survey as a study of King County residents being implemented by the County – rather than by Metro, specifically – in order to encourage participation by all residents and reduce the potential for self-selection bias by disclosing the specific survey topics up front.
- ▶ Onset of the COVID-19 pandemic necessitated pausing survey implementation in Q2 and Q3, 2020. Where relevant in this report, data from Q1 and Q4, 2020 are shown separately to preserve validity of each quarters' results as discrete data points immediately before and a few months into the pandemic.

# Regional Sub-areas

Unweighted 2021 interviews (n)	King Countywide	Seattle/ North King	South King	East King
Total 2021 n	8,337	2,157	3,130	3,050
<i>Margin of Error (+/-)</i>	<i>+/-1.1%</i>	<i>+/-2.1%</i>	<i>+/-1.8%</i>	<i>+/-1.8%</i>
Total Riders	1,019	568	201	250
<i>Margin of Error (+/-)</i>	<i>+/-3.1%</i>	<i>+/-4.1%</i>	<i>+/-6.9%</i>	<i>+/-6.2%</i>
Current Regular Riders (5+ Metro trips in last 30 days)	506	311	85	110
Current Infrequent Riders (1-4 Metro trips in last 30 days)	513	257	116	140
Non-Riders (Including lapsed, occasional and never riders)	7,318	1,589	2,929	2,800
<i>Margin of Error (+/-)</i>	<i>+/-1.1%</i>	<i>+/-2.5%</i>	<i>+/-1.8%</i>	<i>+/-1.9%</i>

Weighted Sample Sub-area %



*The margin of error refers to the observational error associated with surveying a larger population of residents. A 95% confidence interval indicates that a result among the entire population would be expected to fall within +1.1 percentage points from the survey data presented. Within subsets of the entire population, such as the sub-areas presented here, different margins of error apply, based on the size of each individual subset.*



# Seattle Sub-areas

Total yearly n's	Seattle Citywide	North Seattle	Central Seattle	South Seattle
Total n	2,092	963	660	462
<i>Margin of Error (+/-)</i>	<i>+/-2.1%</i>	<i>+/-3.2%</i>	<i>+/-3.8%</i>	<i>+/-4.6%</i>
Total Riders	563	228	239	96
Total Non-Riders	1,522	735	421	366

## Weighted Sample Sub-area %



**Insights Overview  
(Presented in Slides 17-21)**

# Perceptions of King County Metro Residents vs. Riders

- ▶ Two-thirds (66%) of survey respondents had favorable opinions of Metro; a similar share (67%) gave it a positive (excellent or good) rating. Half of respondents indicated high confidence in the agency.
  - Over the course of 2021, opinions of Metro remained relatively stable relative to the onset of the COVID-19 pandemic. As fewer people used Metro, a larger share of survey respondents were unable to rate the agency one way or the other.
- ▶ Riders remained highly satisfied with Metro's service. Overall satisfaction has remained steady over the last couple of years, with higher positive intensity since the beginning of the pandemic.
  - Rider satisfaction with King County Metro was highest among those living in the Seattle/North King area and among those riders with household incomes below \$35,000 and those living at or below the 200% federal poverty level.

# Market Share & Ridership

- ▶ Following a significant drop in personal and household ridership in 2020 as the COVID-19 pandemic widely disrupted work situations, travel patterns, and commuting behaviors, the survey was adjusted to gain deeper insights into changes in travel behaviors as a result of the pandemic, i.e., to measure lapsed ridership and understand how service changes related to the pandemic have impacted rider perceptions of Metro.
- ▶ In 2021, Metro's reported market share partially rebounded, showing steady growth between Q1 and Q3 before plateauing in Q4. In Q1 2020, the share of households in King County with Metro riders was 65%. Ridership did not fully return to pre-pandemic levels in 2021, though reported ridership doubled from an observed low of 14% in Q1 to 28% in Q4.
  - Ridership growth occurred mainly in Seattle/North King County, where the share of households with Metro riders grew from approximately one-in-five (22%) to nearly half (47%) over the course of 2021. Growth of Metro market share in South King and East King has been more gradual.
- ▶ Overall, the highest rates of ridership occurred within the Seattle/North King County subarea, and specifically among those living in Central Seattle, where two-in-five (43%) reported making trips on Metro at least monthly.

- ▶ About three-fourths of riders (77%) typically used ORCA cards to pay their bus fare, while one-in-five (20%) reported using cash.
  - The reported share of riders paying fares with ORCA cards was roughly the same as Q4 2020, though lower than before the pandemic (85% reported paying fares with an ORCA card in Q1 2020).
- ▶ Over two-thirds (70%) of riders indicated their fare category to be full-fare adults. About one-in-six (15%) indicated that they are seniors/65+ with a reduced fare. Smaller shares of riders indicated membership in other fare categories including students, ORCA LIFT users, and disabled users.

# Ridership Barriers and Incentives

- ▶ Among all survey respondents: 42% indicated that traveling by bus takes too long, 25% indicated that the bus does not offer enough flexibility for their schedules and 25% reported having health and safety concerns about using public transit during the pandemic.
- ▶ Concern for personal safety was also a barrier for some; one-in-five residents indicated that they had concerns about personal safety, both on the bus (21%) and at bus stops (20%).
  - Among riders, there was general satisfaction with personal safety during the daytime both at stops (80% satisfied) and on-board (74% satisfied). However, satisfaction with personal safety at night was much lower; 46% were satisfied with nighttime safety on-board and 41% were satisfied with nighttime safety at stops.
- ▶ Questions about what King County Metro could do to increase likelihood of future ridership garnered varied responses. The top suggestions were (1) more convenient stops/routes and (2) reactivating routes closed during the COVID-19 pandemic, with 16% of King County residents suggesting such changes.



# Metro Priority Populations

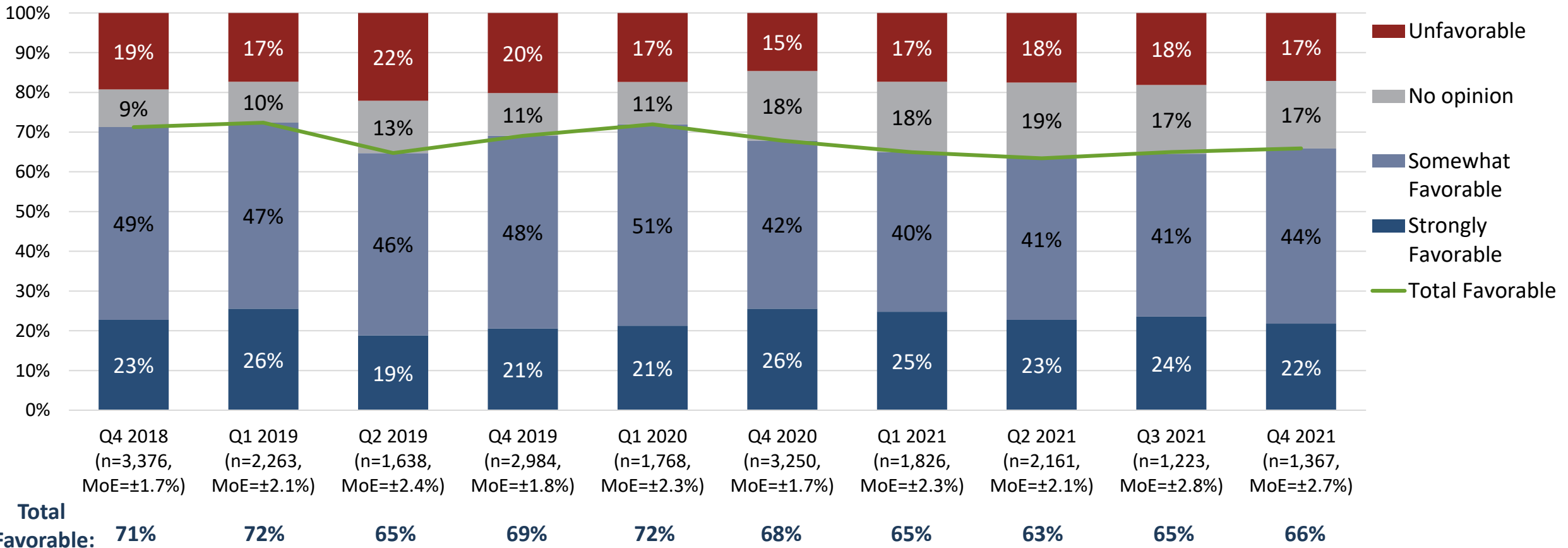
- ▶ King County Metro riders with lower household incomes and those with disabilities indicated the most reliance on Metro for their transportation needs.
- ▶ BIPOC residents rode Metro at higher rates than white residents – 16% of white residents indicated travelling with Metro at least monthly, compared to 28% of Hispanic/Latinx residents, 24% of African American/Black residents, and 21% of Asian/Pacific Islander residents.
  - BIPOC riders also indicate higher reliance on Metro for transportation needs than white riders – 5% of white Metro riders relied on Metro for all transportation needs, compared to 8% of African American/Black riders, 12% of Asian/Pacific Islander riders, and 20% of Hispanic/Latinx riders.
- ▶ Satisfaction with Metro was highest among riders above 55 (44% very satisfied), riders with household incomes below \$35,000 (43% very satisfied) and riders living at or below the 200% federal poverty level (42% very satisfied).
- ▶ Satisfaction with Metro did not differ significantly between white and BIPOC riders.

# **Overall Perceptions of King County Metro**

# Metro Favorability Quarterly Trend – All Residents

Since the onset of the COVID-19 pandemic, residents were more likely to indicate no opinion of King County Metro, which may reflect lower levels of ridership/interaction with Metro among residents countywide since the onset of the pandemic. “Strongly favorable” perceptions of Metro tempered slightly over the course of 2021, though “unfavorable” ratings held steady in that time.

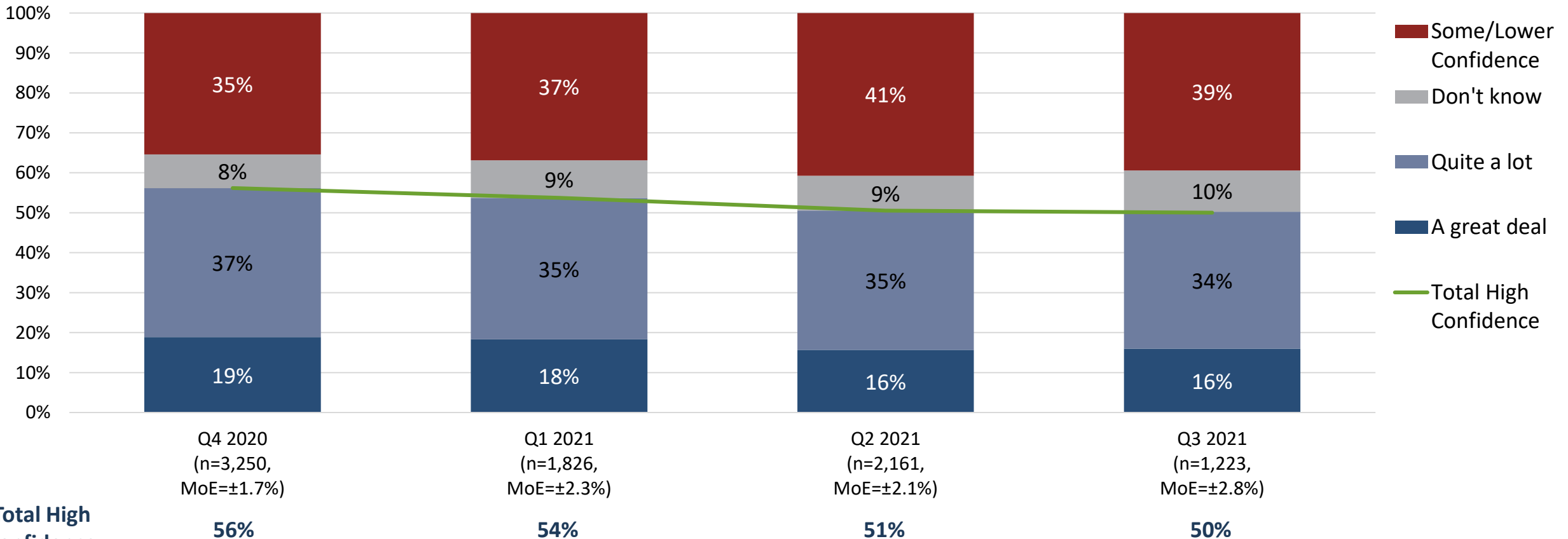
## Overall Favorable Rating of King County Metro - Trend



# Metro Confidence – All Residents Tracked

More respondents indicated lower confidence in KC Metro in 2021, compared with respondents in Q4 2020.

Confidence in King County Metro - Trend



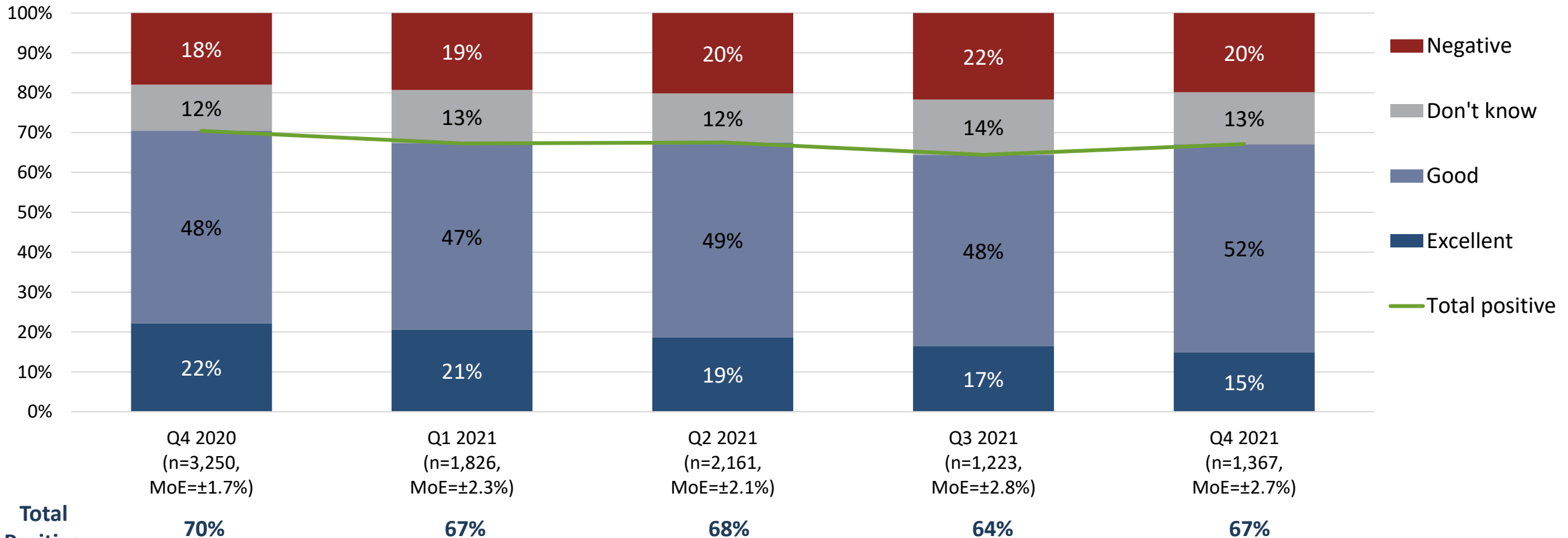
**Total High Confidence:**

Based on what you have seen, heard, or directly experienced, how much confidence do you have in King County Metro, overall?

# Metro Job Rating Tracked – All Residents

*Positive perceptions of the job King County Metro is doing overall tempered slightly quarter-by-quarter in 2021. However, negative ratings did not significantly increase in that time.*

Metro Job Rating - Trend

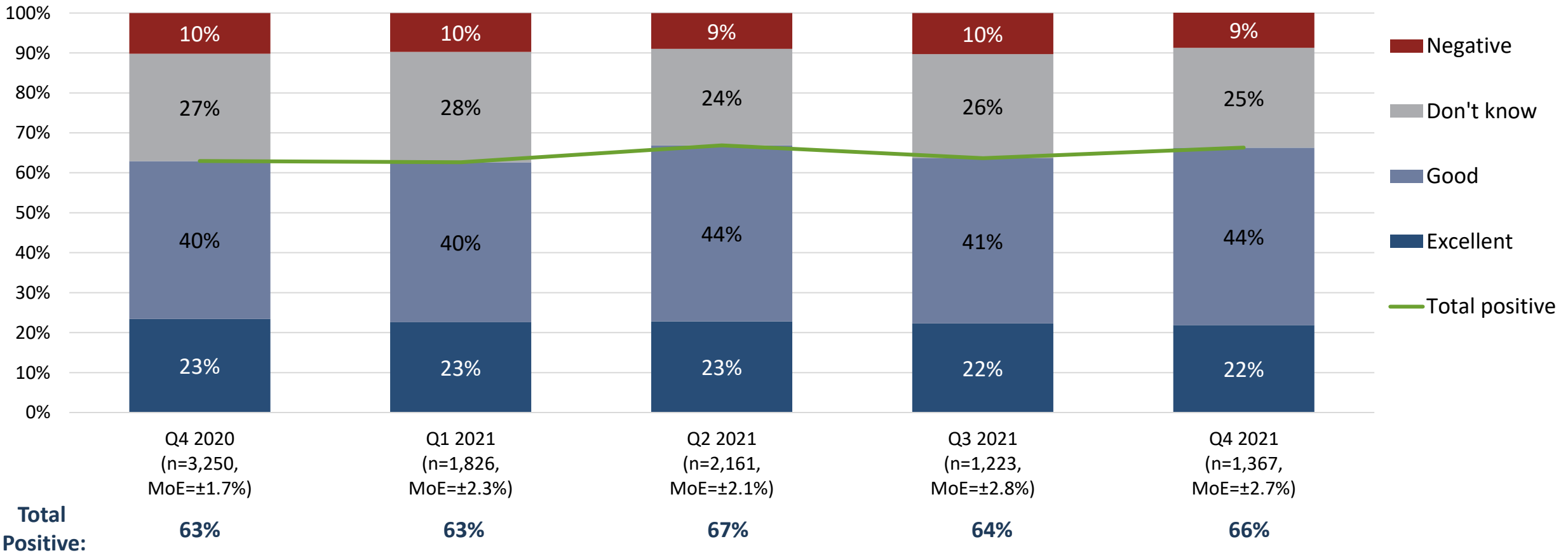


CV8. Based on what you have seen, heard, or directly experienced, how would you rate the job King County Metro is doing overall?

# Metro COVID-19 Response Rating Tracked – All Residents

*Perceptions of King County Metro’s response to the COVID-19 pandemic were both steady and positive in 2021, with slight increases in total positive ratings compared to Q4 of 2020.*

### Metro COVID-19 Response Rating- Trend



Based on what you have seen, heard, or directly experienced, how would you rate the job King County Metro is doing responding to the Coronavirus public health crisis?

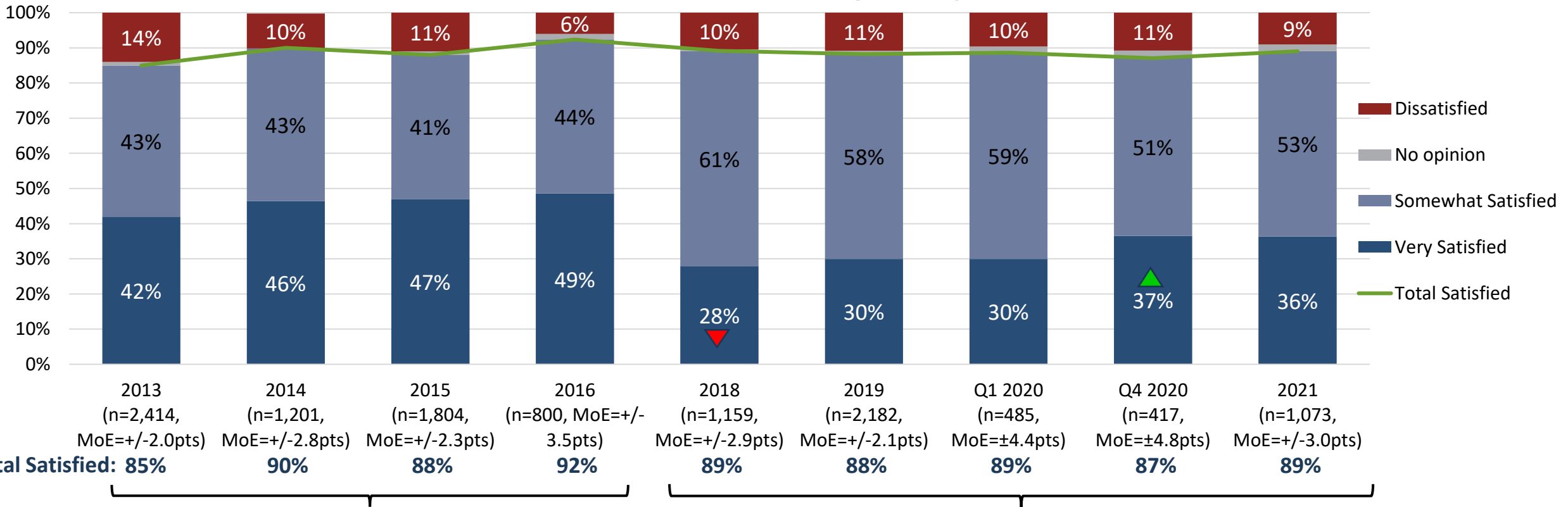


# **Overall Rider Satisfaction with King County Metro**

# Overall Rider Satisfaction – Yearly Trends

Current riders continued to give Metro high marks relative to the beginning of the pandemic. Overall satisfaction remained near pre-pandemic levels measured in 2019, and the intensity of satisfaction with Metro increased.

Overall Rider Satisfaction with King County Metro - Trend



\*Random Digit Dial (RDD) telephone only methodology; Introduced as a survey on behalf of KC Metro

\*\*Multimodal mail-driven web and phone Address Based Sampling (ABS) methodology; Introduced as a survey of all riders on behalf of King County

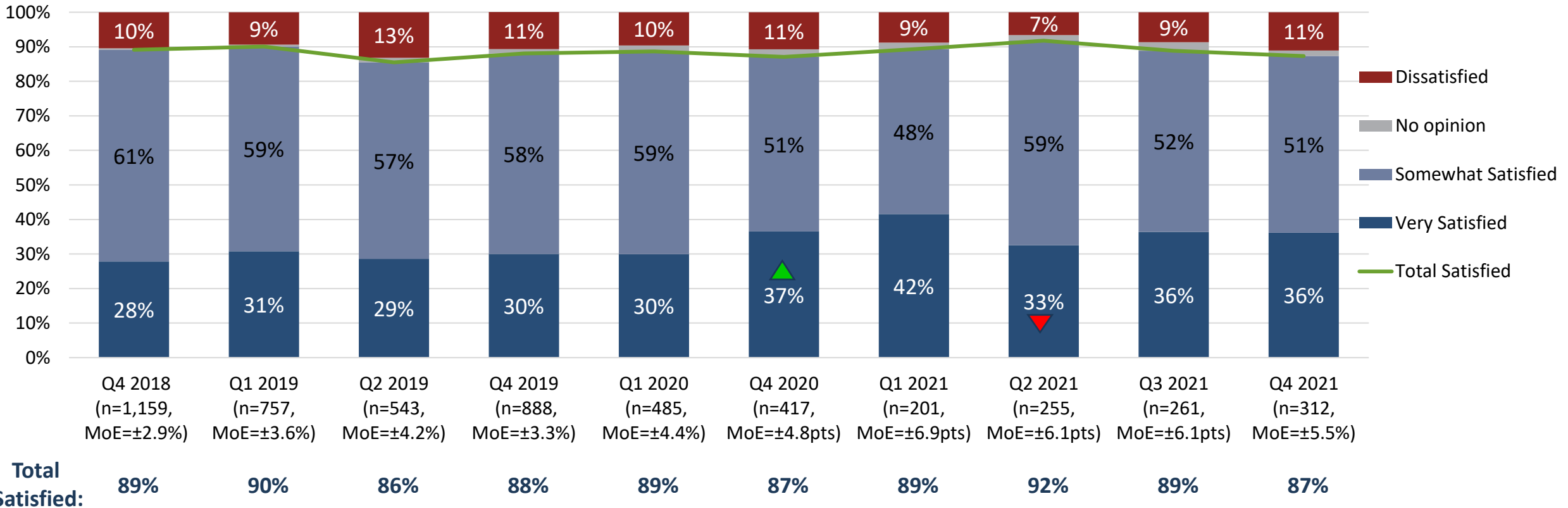
Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.

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

# Overall Rider Satisfaction – Quarterly Trends

Among current monthly riders, satisfaction with King County Metro remained steady throughout 2021; however, ratings of satisfaction with intensity fluctuated quarter-on-quarter.

Overall Rider Satisfaction with King County Metro Among Regular & Infrequent Riders - Trend



Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.

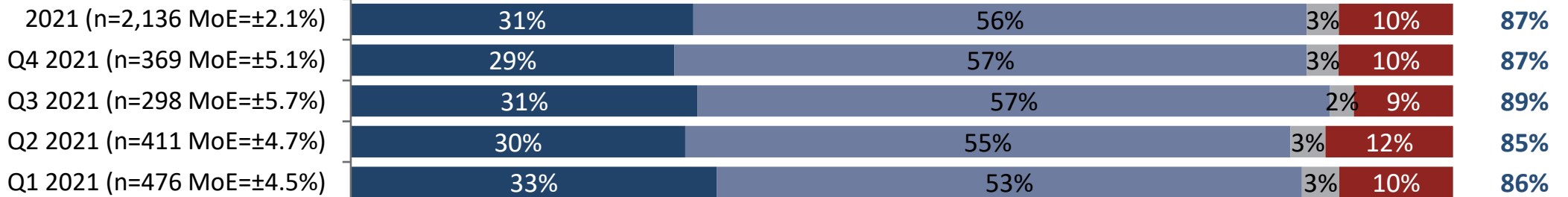
# Overall Metro Satisfaction Trend – by Aggregated Region

Satisfaction with King County Metro was higher among current, lapsed and occasional riders residing in the Seattle/North King County area. Satisfaction among those in South King and East King fluctuated slightly more across 2021 than did ratings in Seattle/North King.

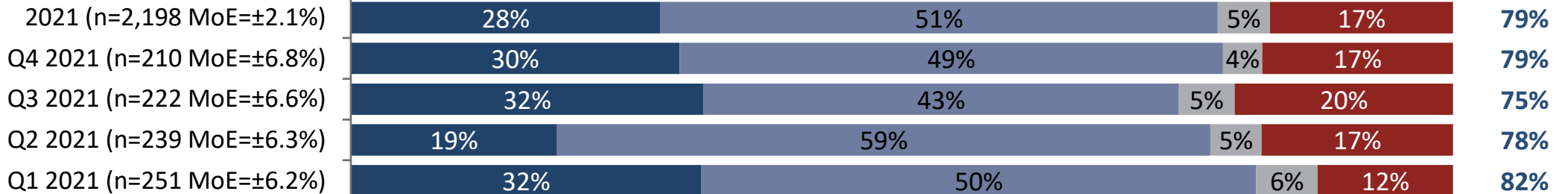
Subgroup categories include aggregated regular+infrequent riders, lapsed, and occasional

■ Very Satisfied    ■ Somewhat Satisfied    ■ No opinion    ■ Dissatisfied    **Total Sat.**

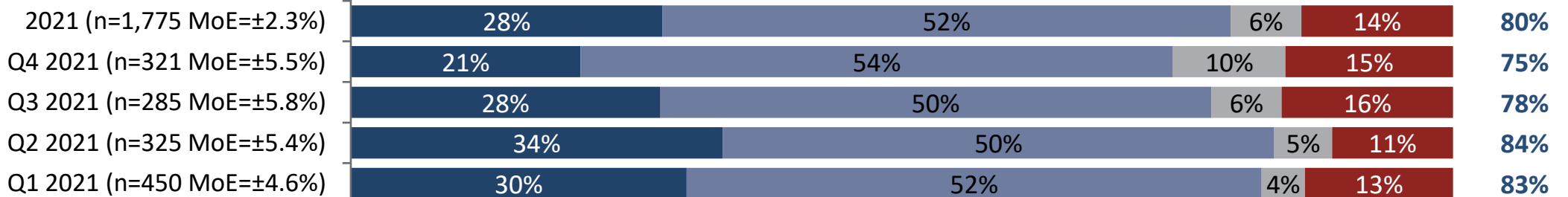
## Seattle/ North King



## South King

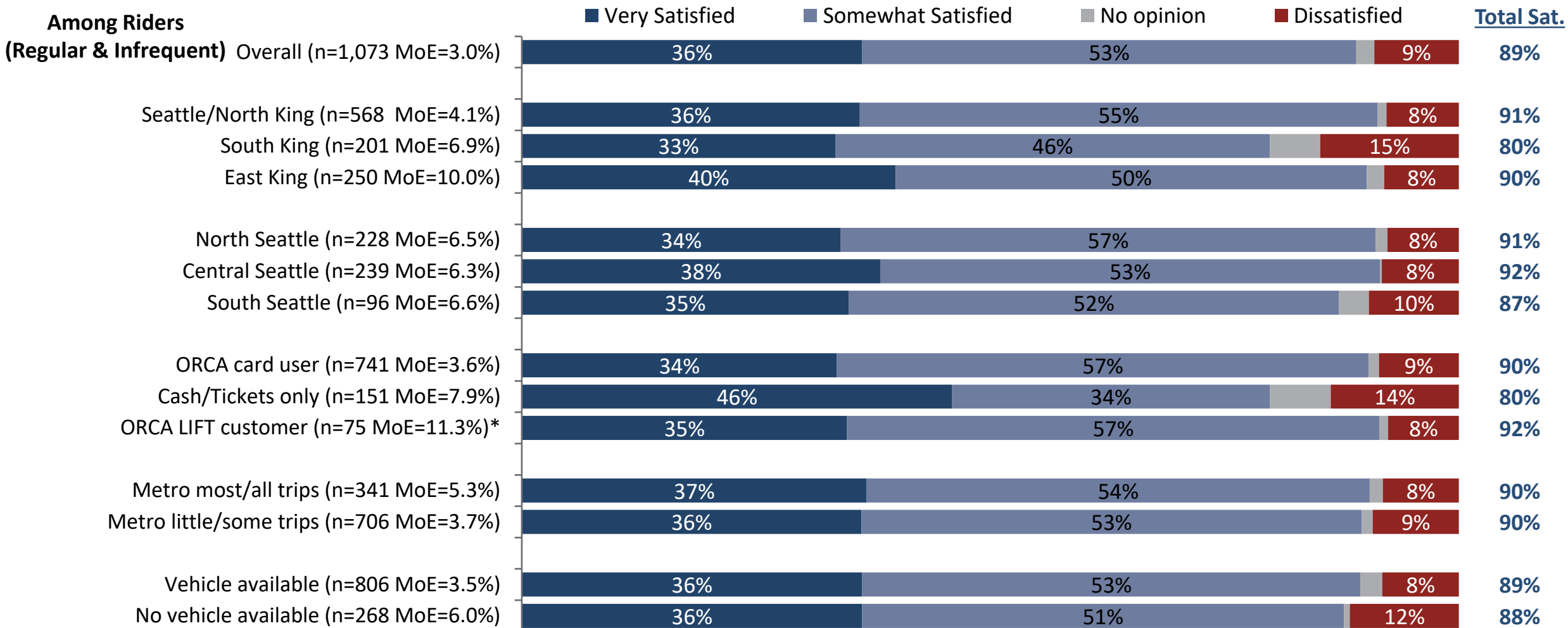


## East King



# Overall Metro Satisfaction – by Subgroup

Satisfaction with Metro was high among various key subgroups. Intense satisfaction was highest among riders using Cash or Tickets to pay for their fares, but overall satisfaction was also relatively lower among that group.

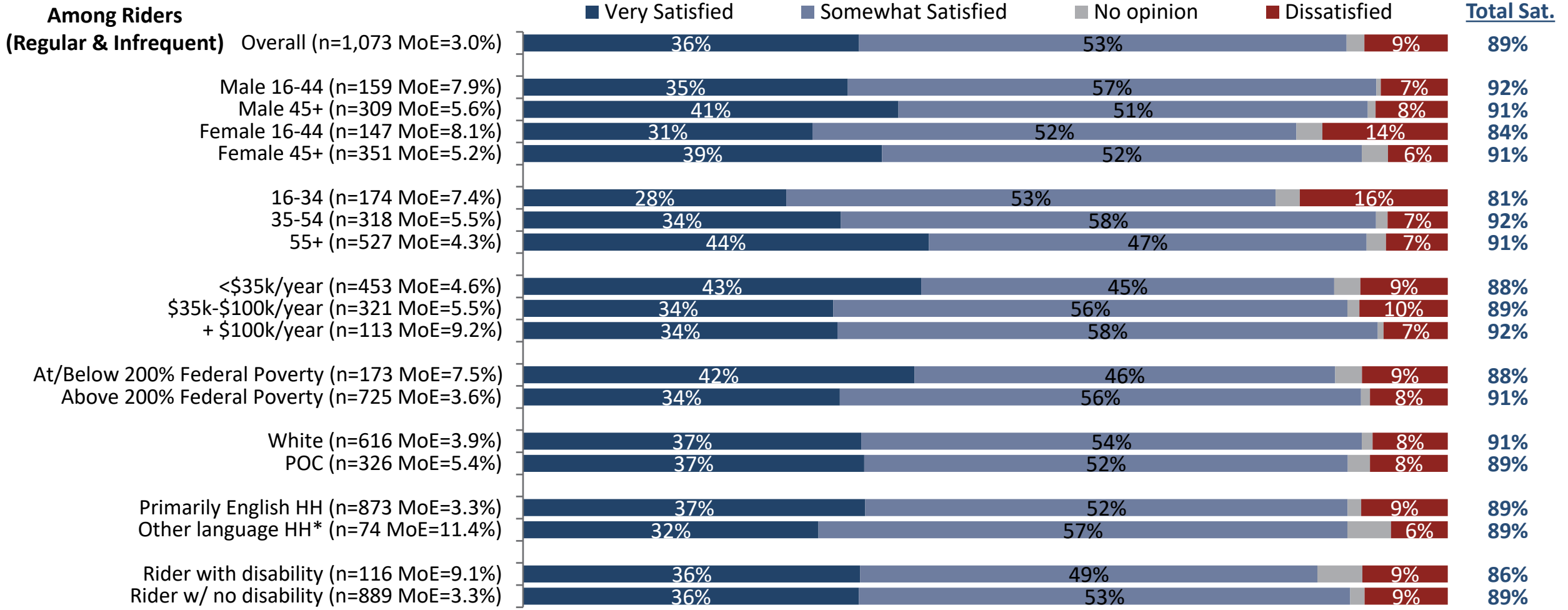


*\*Please note small sample sizes*

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

# Overall Metro Satisfaction – by Subgroup

Rider satisfaction was higher among those over 35, among those with household incomes below \$35,000 and among those living at or below the 200% Federal Poverty Level.



*\*Please note small sample sizes*

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



# **Rider Satisfaction with Individual Metro Service Elements**

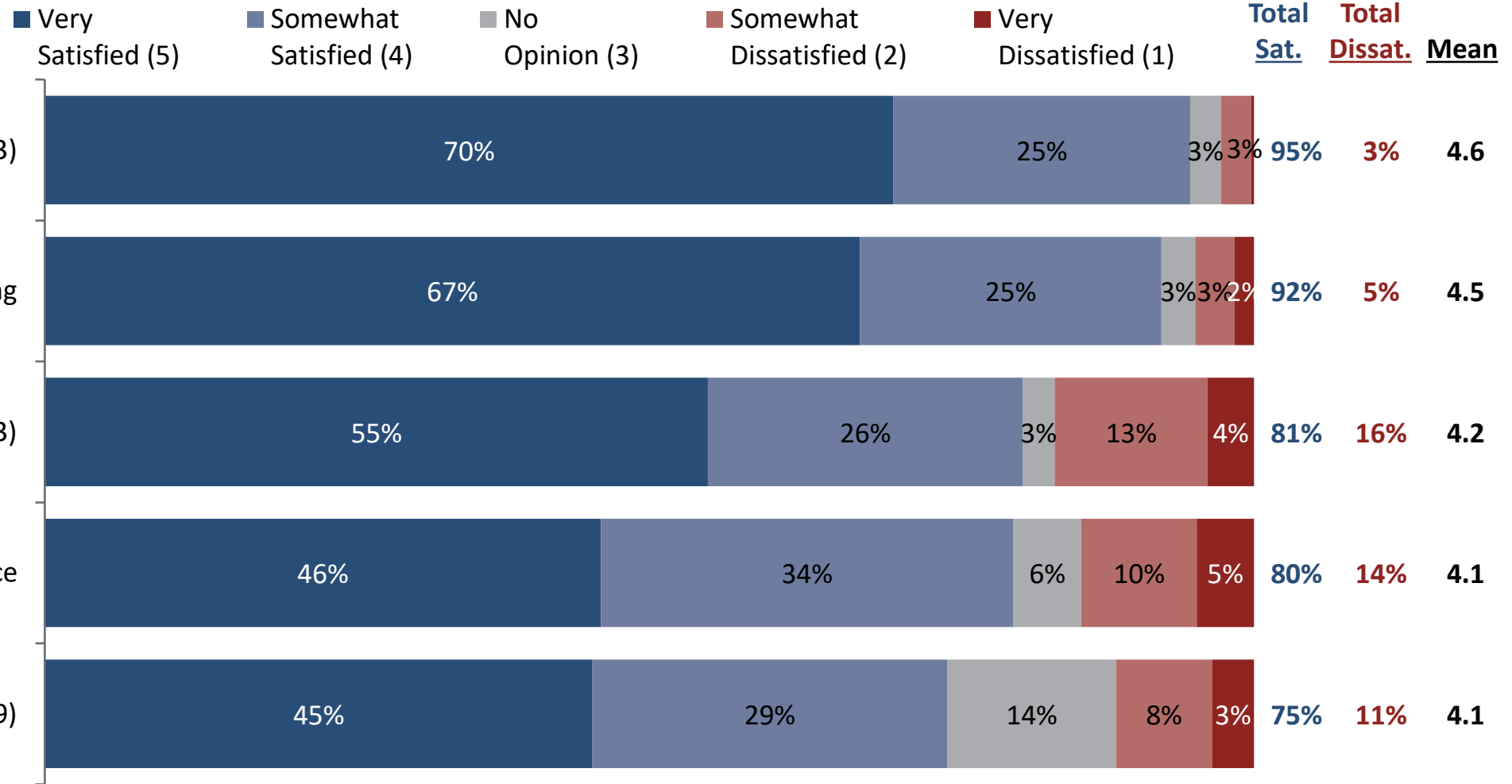
# Individual Service Elements – Net Satisfaction Ranking

Service Element	n	Total Satisfied (Very+ Smwt)	Total Dissatisfied (Very+Smwt)	Net Satisfied (Sat. over Dissat. +/-)	Service Element	n	Total Satisfied (Very+ Smwt)	Total Dissatisfied (Very+Smwt)	Net Satisfied (Sat. over Dissat. +/-)
FARE: ORCA cards	809	95%	3%	+92	INFO: Service changes	1,073	64%	19%	+44
FARE: Ease of paying	1,073	92%	5%	+88	LOS: Travel time	1,073	70%	29%	+41
C&C: Seating availability on the bus	1,073	86%	10%	+76	INFO: At stops	1,073	67%	26%	+40
CV: Metro info during COVID	1,073	79%	8%	+71	INFO: Temporary service changes	1,073	63%	23%	+40
FARE: Value of service	1,073	80%	14%	+65	INFO: Timeliness	1,073	58%	19%	+40
FARE: Ease of adding value	446	81%	16%	+65	C&C: Overcrowding on-board	1,073	64%	25%	+39
FARE: Ease of loading pass	184	75%	11%	+64	INFO: Website postings of delays	1,073	51%	15%	+35
SAFETY: Daytime at stops	905	79%	17%	+62	TRANSFER: Service connections	923	56%	21%	+35
C&C: Ease of entering/exiting	1,073	74%	18%	+56	C&C: Shelter availability at stops	1,073	63%	29%	+34
INFO: Online	1,073	66%	11%	+55	TRANSFER: Wait time	923	55%	29%	+26
INFO: Long term service changes	1,073	67%	15%	+52	C&C: Seating availability at stops	1,073	56%	32%	+24
SAFETY: Daytime safety w/ others	905	74%	22%	+52	C&C: Stop cleanliness	1,073	55%	41%	+14
LOS: Availability of service	1,073	74%	23%	+51	SAFETY: Nighttime at stops	905	46%	37%	+9
LOS: On-time performance	1,073	73%	24%	+50	SAFETY: Nighttime safety w/ others	905	41%	41%	+0
LOS: Frequency of service	1,073	72%	24%	+48					

# Satisfaction with Fare Payment Service Elements

Among the various aspects of service related to fare payment, satisfaction was highest with ORCA Cards and with the ease of paying fares.

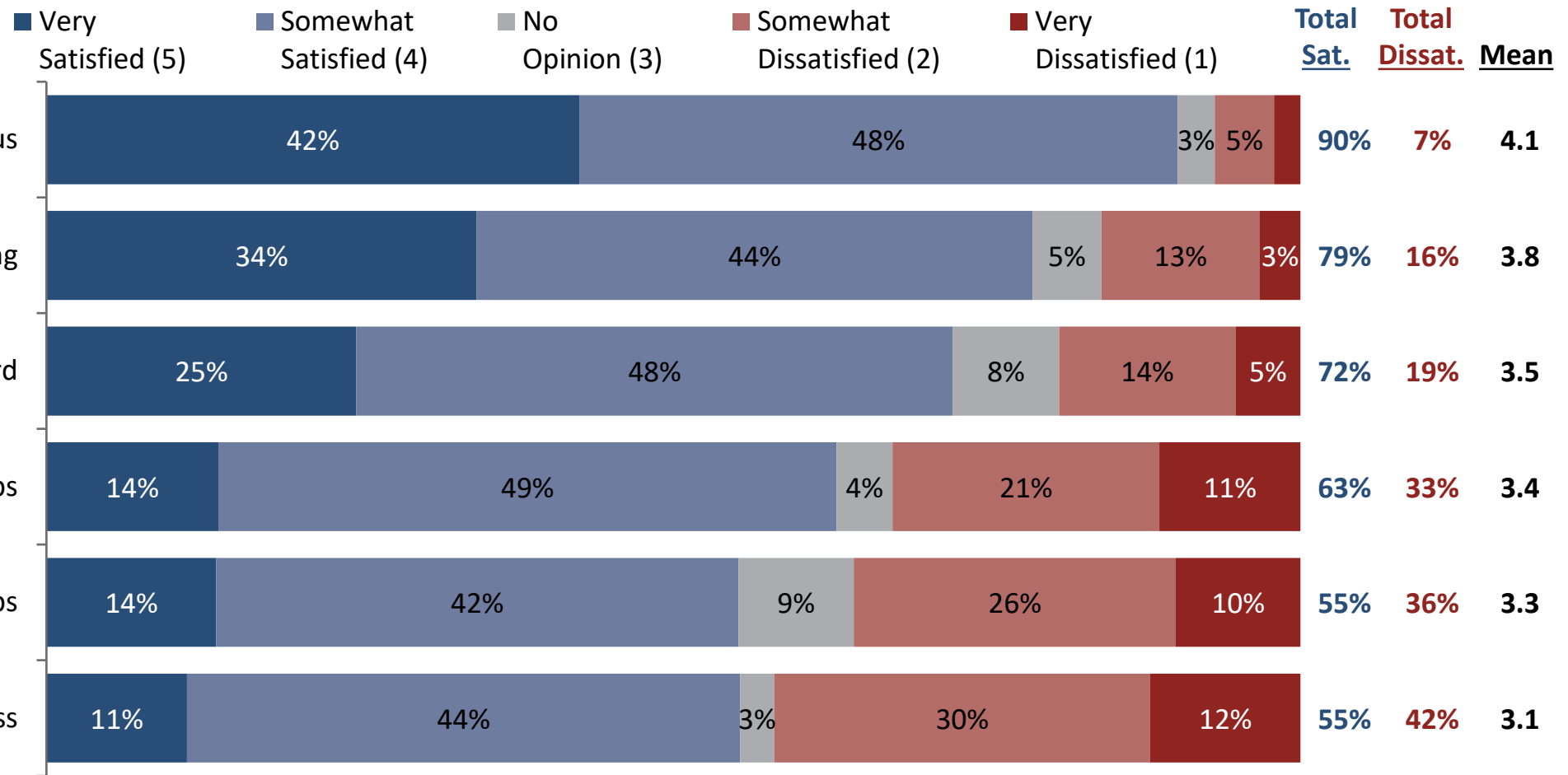
## Among Riders (Regular & Infrequent)



# Satisfaction with Comfort & Cleanliness Service Elements

*Satisfaction with the availability of seating on the bus was rated most highly among elements related to comfort and cleanliness; satisfaction was lower with elements relating to comfort and cleanliness of stops.*

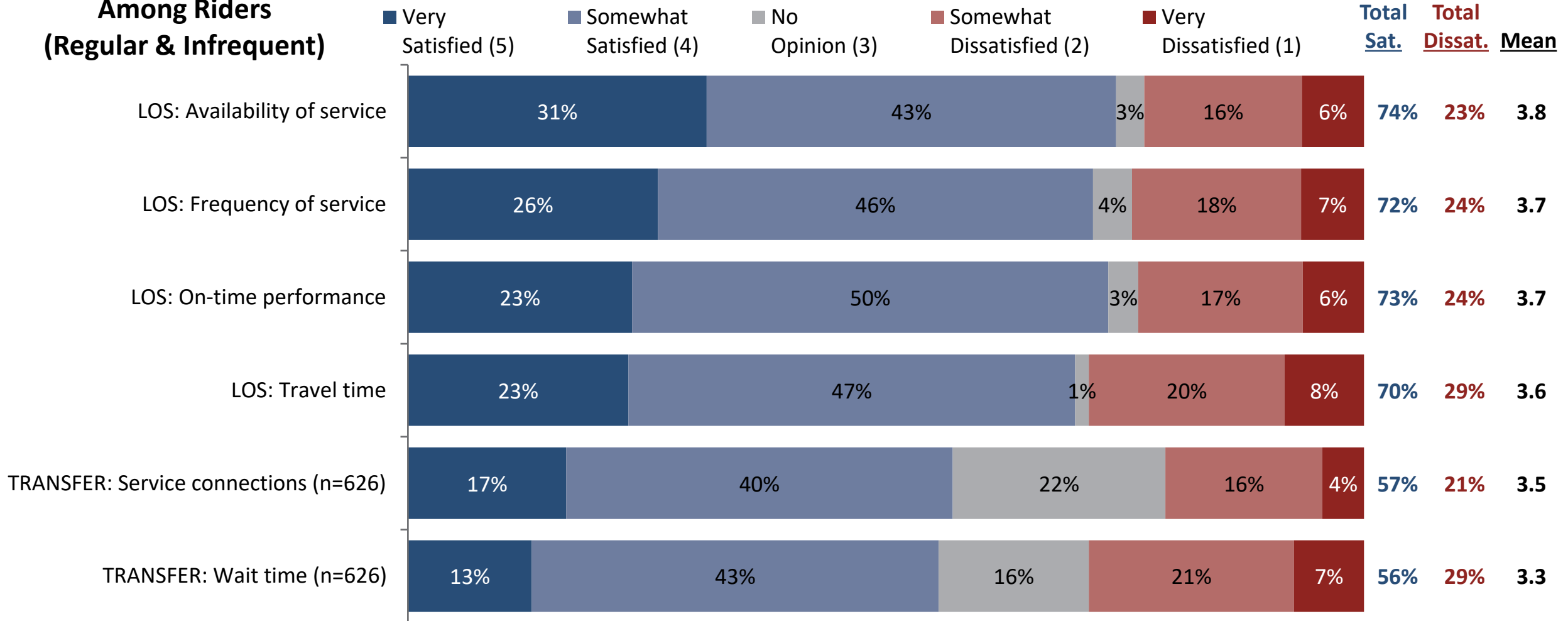
## Among Riders (Regular & Infrequent)



# Satisfaction with Level of Service and Transfer Service Elements

*Satisfaction with service elements related to general levels of service was higher than satisfaction with service elements related to transfers.*

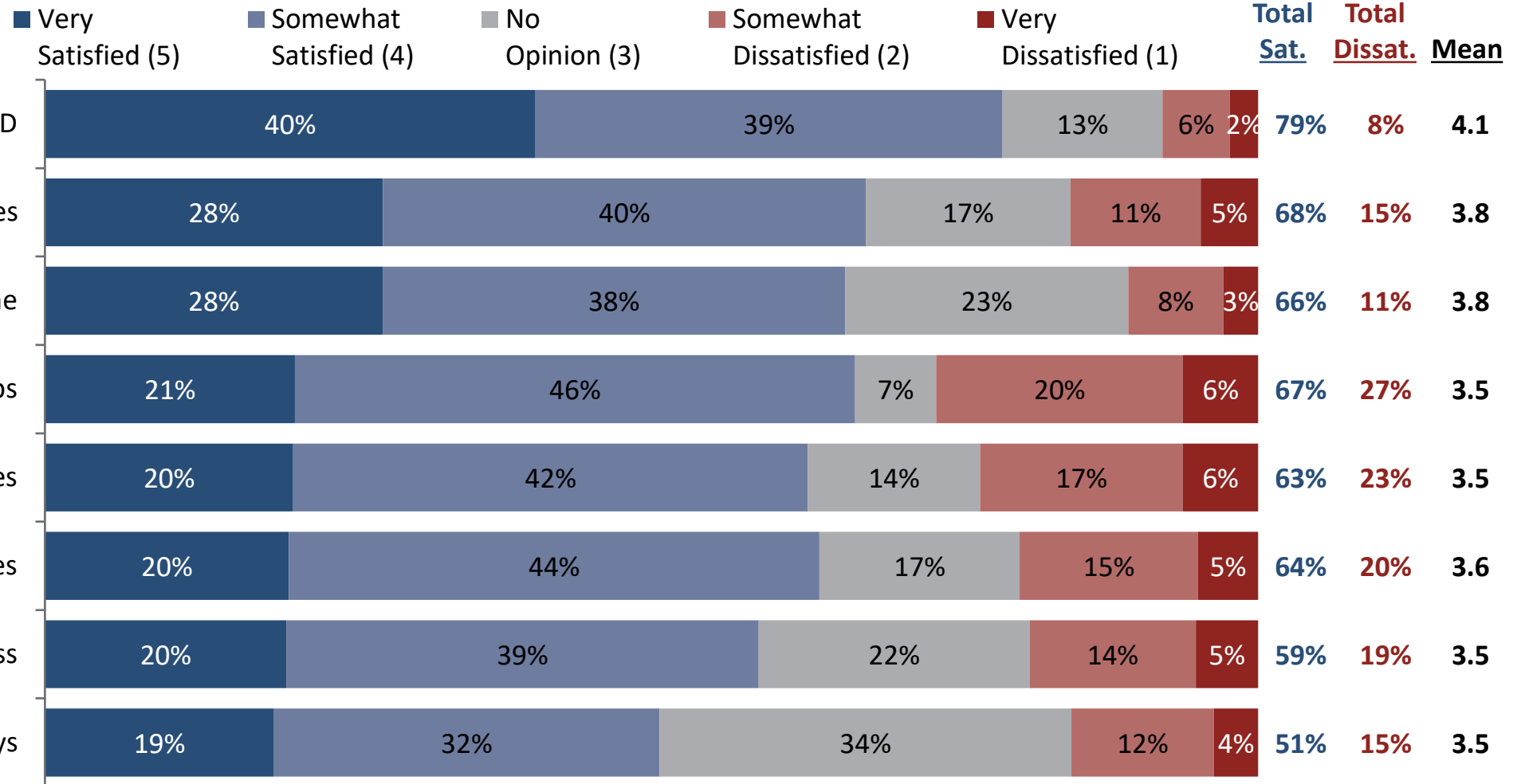
## Among Riders (Regular & Infrequent)



# Satisfaction with Information Service Elements

Riders indicated high satisfaction with Metro communications regarding the COVID-19 pandemic. There was lessened satisfaction with other aspects of Metro communications, particularly with website postings of delays.

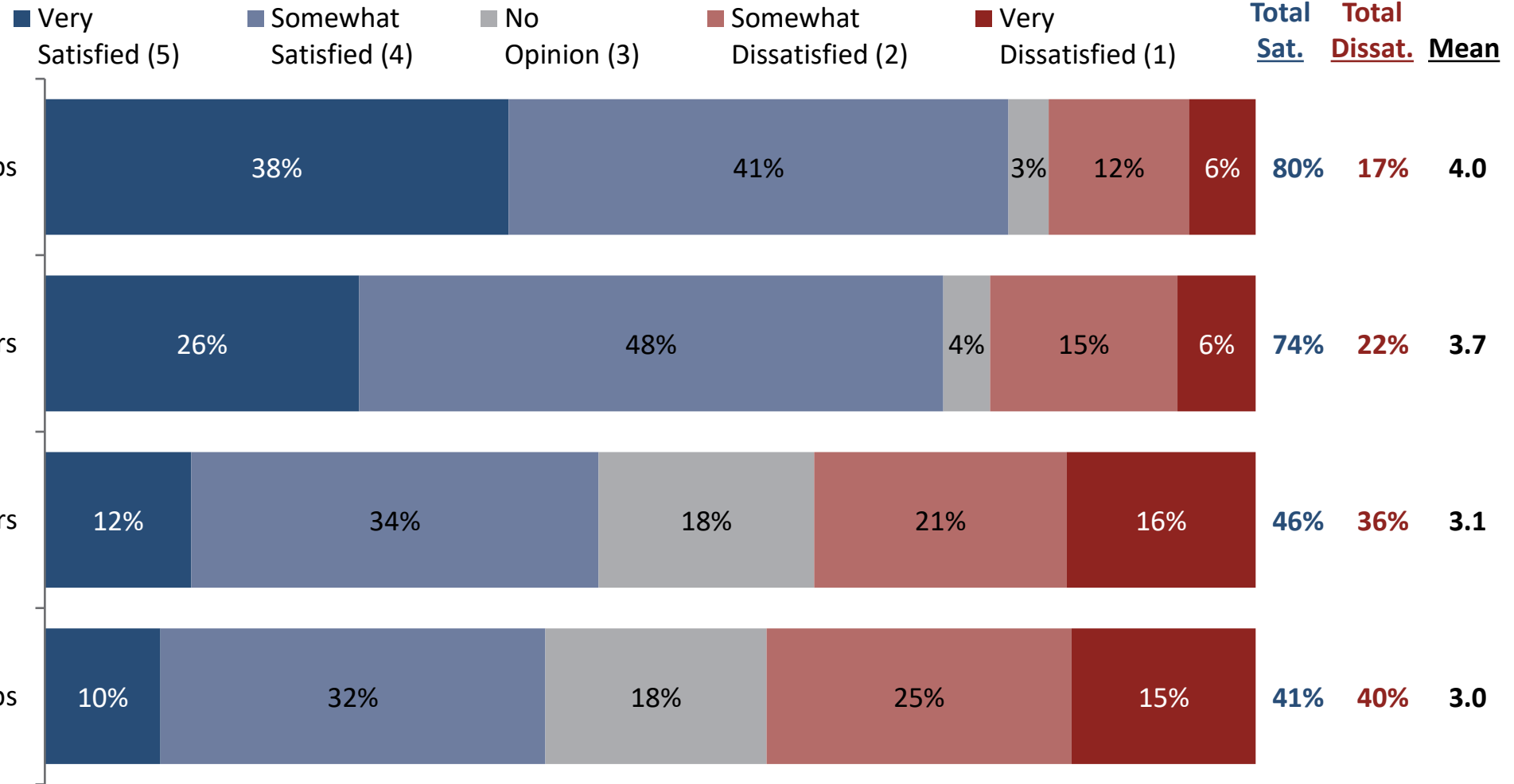
## Among Riders (Regular & Infrequent)



# Satisfaction with Personal Safety Service Elements

Riders indicated higher satisfaction with personal safety during the day. Two-in-five riders indicated dissatisfaction with nighttime safety at stops.

## Among Riders (Regular & Infrequent)

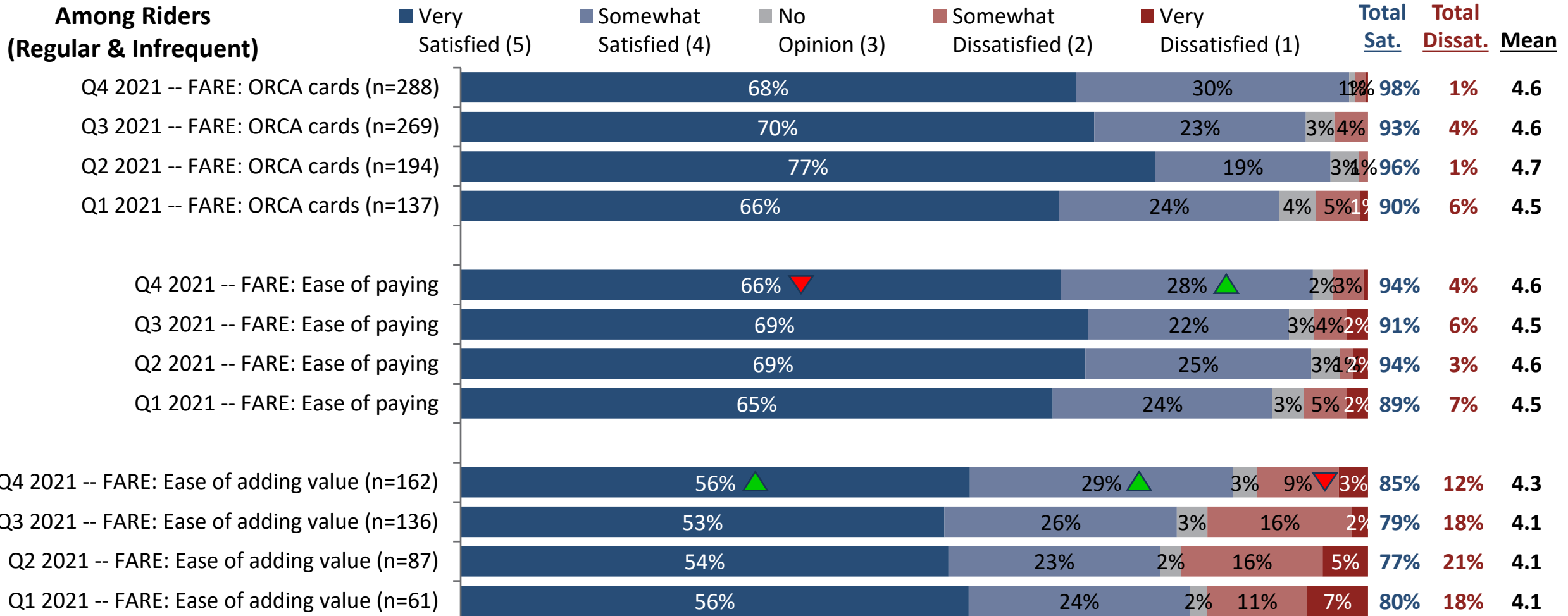


# **Individual Element Satisfaction: Quarterly Comparisons**



# Fare Element Satisfaction Trend – Riders

*Satisfaction with ORCA cards, the ease of paying, and the ease of adding value all increased in 2021, though the intensity of satisfaction with ORCA cards decreased since Q2 of 2021, even as total satisfaction increased throughout 2021.*

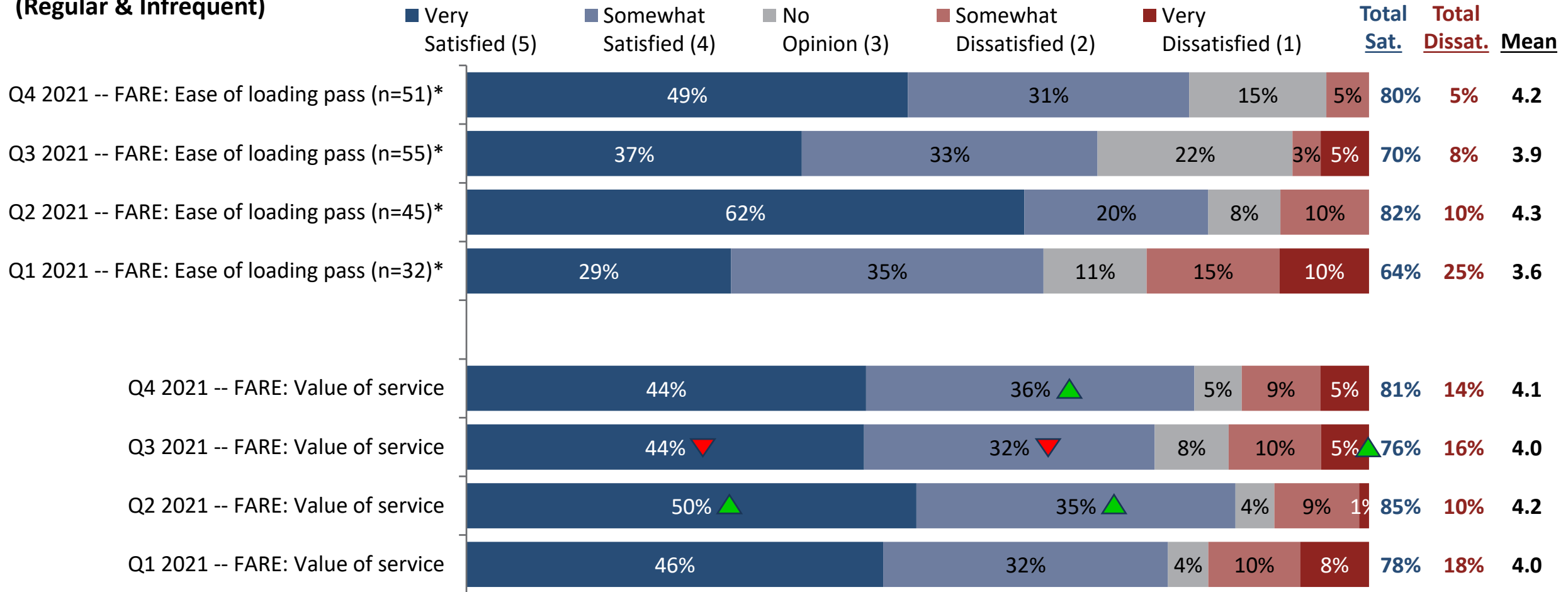


Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.

# Fare Element Satisfaction Trend – Riders (cont'd)

Satisfaction with the ease of loading passes fluctuated throughout 2021, likely due to small quarterly sample sizes.

## Among Riders (Regular & Infrequent)



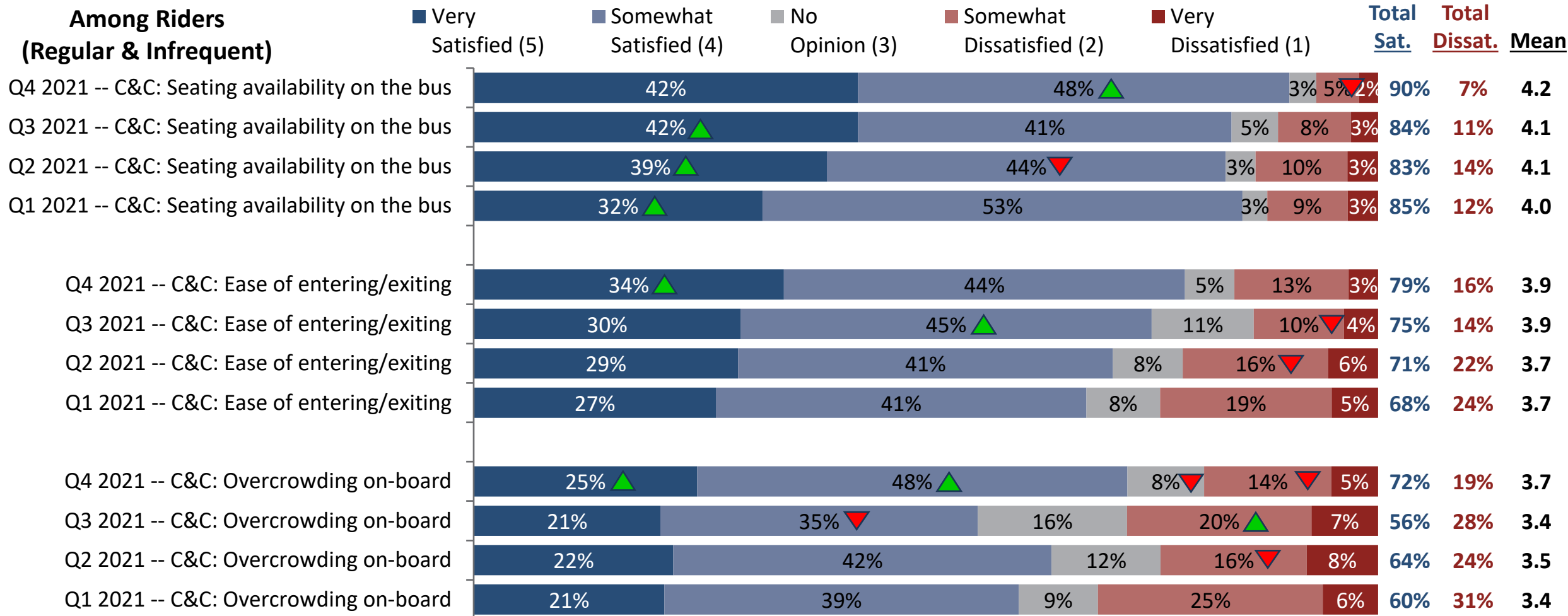
Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.

*\*Please note small sample sizes of quarterly response to F5C: FARE: Ease of loading pass*

# Comfort and Cleanliness Element Satisfaction Trend – Riders

We'll Get You There

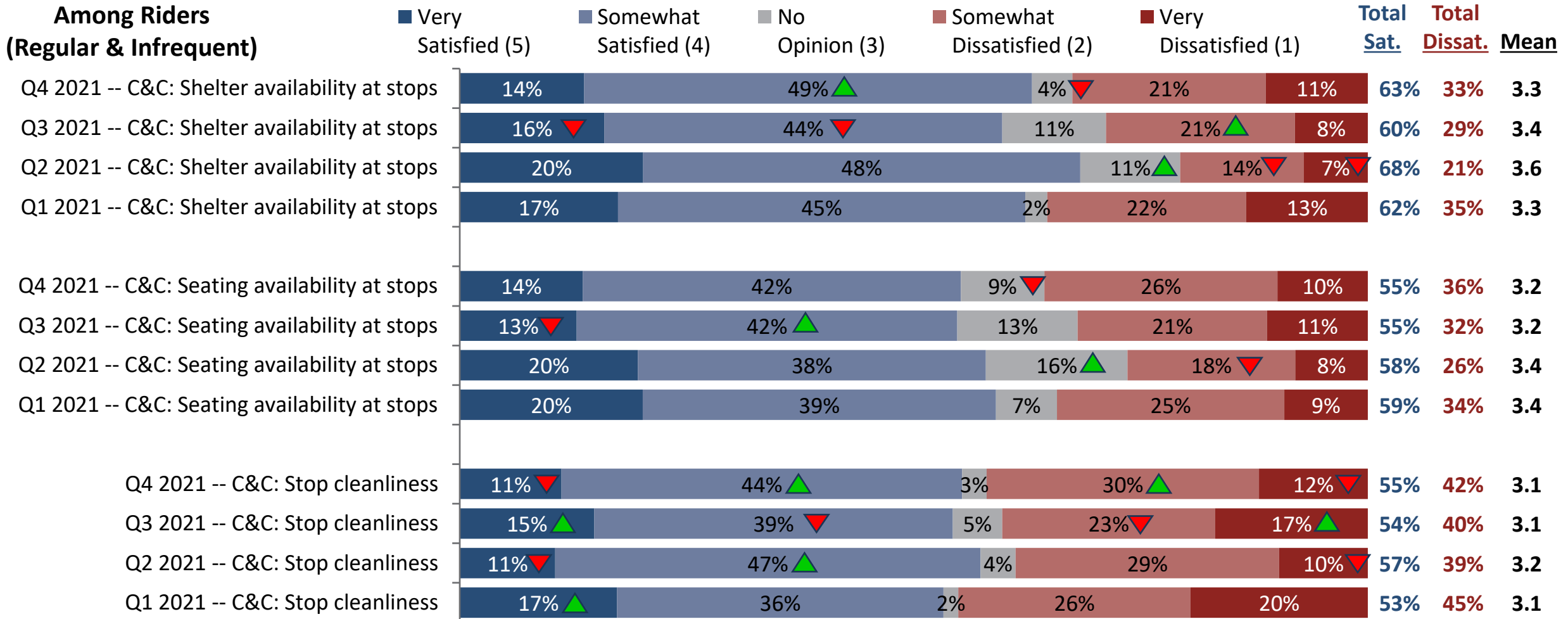
*Satisfaction with the availability of seating on the bus increased over the course of 2021, both in total satisfaction and intensity. Likewise, satisfaction increased with the ease of entering/exiting. Satisfaction with overcrowding was much increased in Q4.*



Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.

# Comfort and Cleanliness Element Satisfaction Trend – Riders (cont'd)

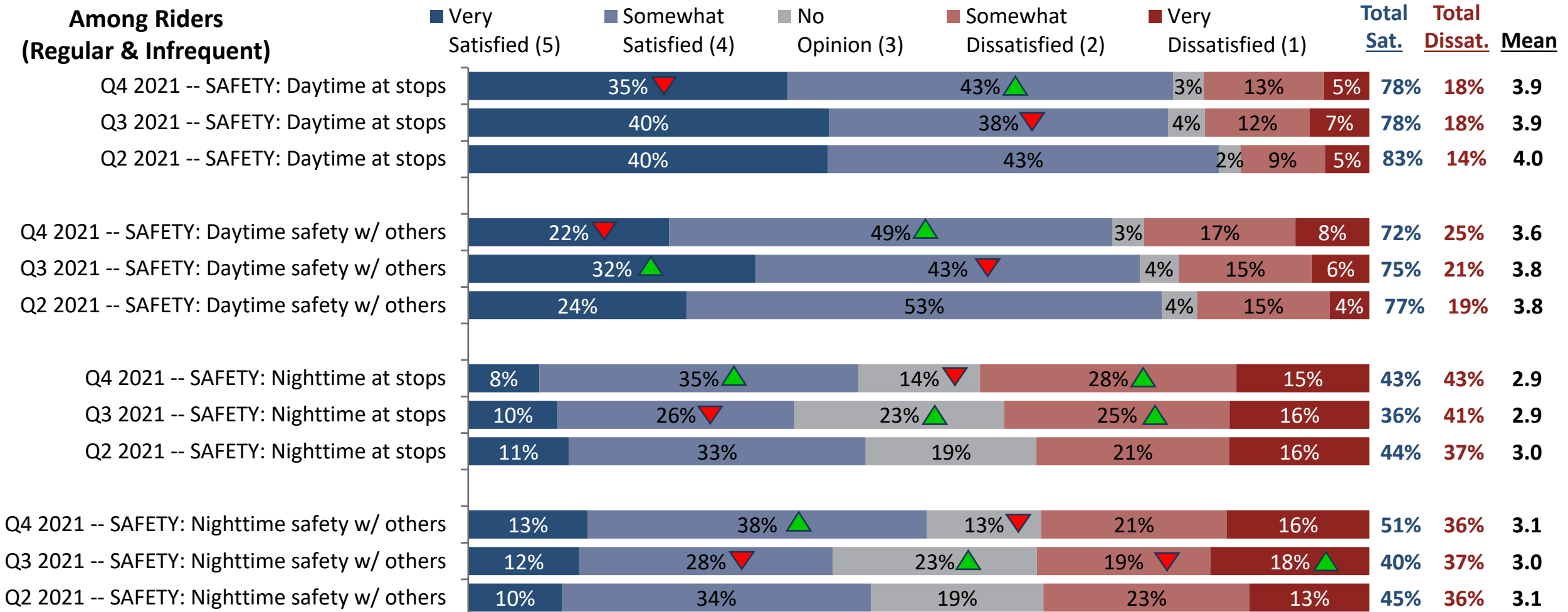
Satisfaction with the availability of shelters at stops fluctuated over the course of 2021, while ratings of seating availability at stops have decreased, particularly between Q2 and Q3.



Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.

# Personal Safety Element Satisfaction Trend – Riders

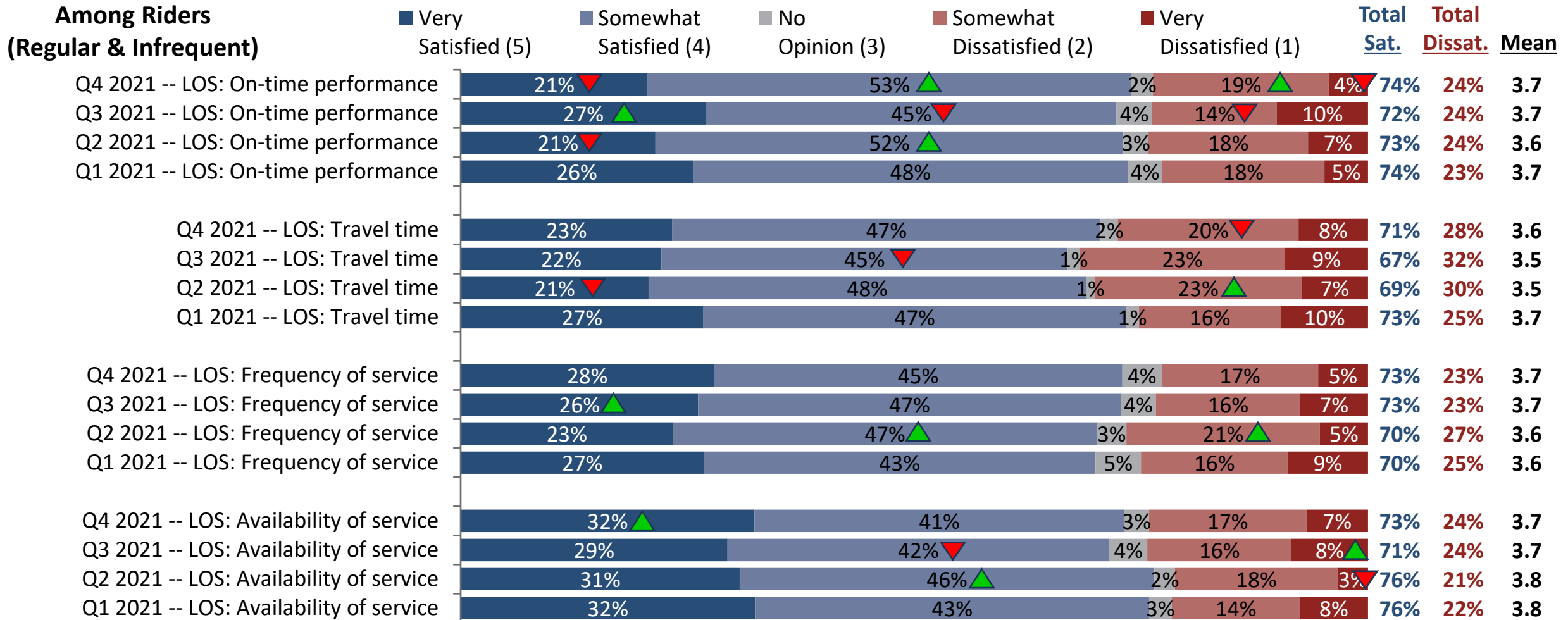
Satisfaction with personal safety during the day decreased between Q2 and Q4 of 2021, while ratings of personal safety at night fluctuated.



Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.

# Level of Service Element Satisfaction Trend – Riders

*Satisfaction with service elements related to general levels of service were relatively stable throughout 2021, with some fluctuations in intensity of satisfaction but little change in total levels of satisfaction and dissatisfaction.*

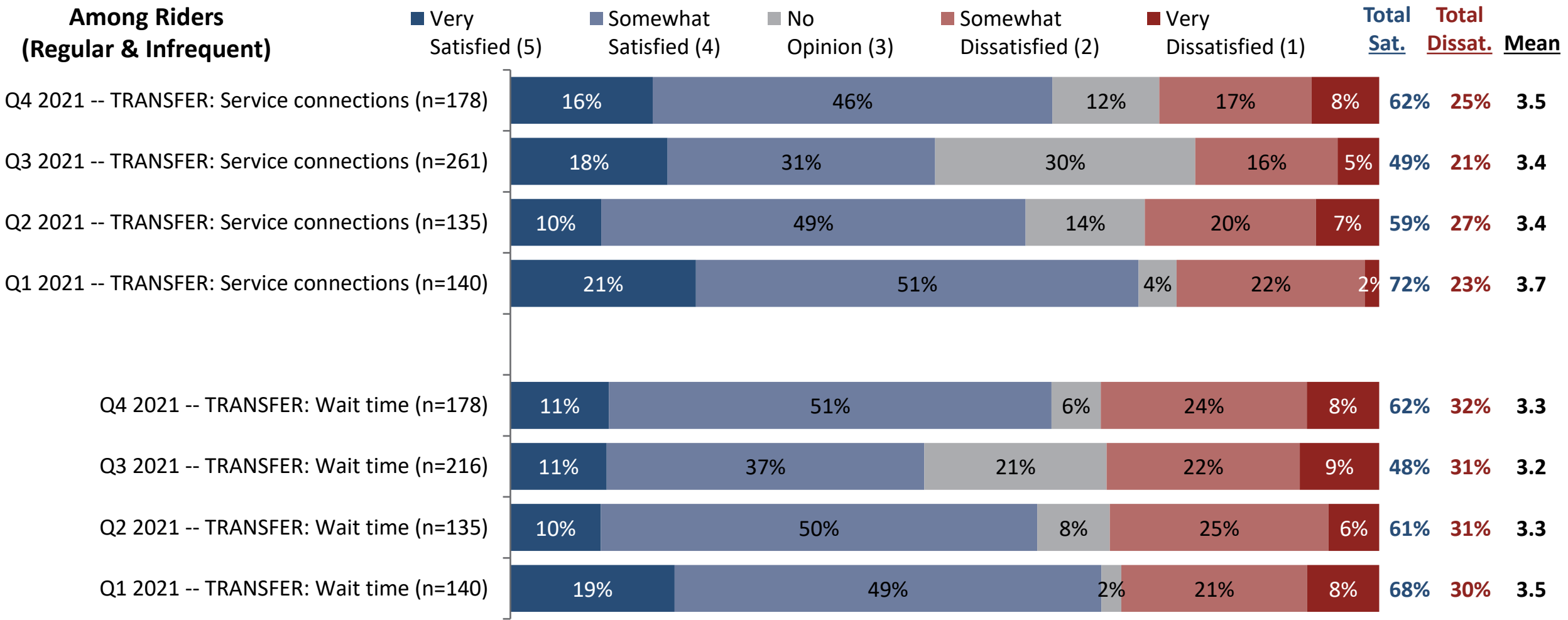


Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.



# Transfer Element Satisfaction Trend – Riders

Satisfaction with transfers fluctuated throughout the year, with total satisfaction dropping throughout the course of the year both in terms of service connections and transfer wait time.



Statistically significant shifts from the previously measured rating are represented by a ▲ or ▼ icon.

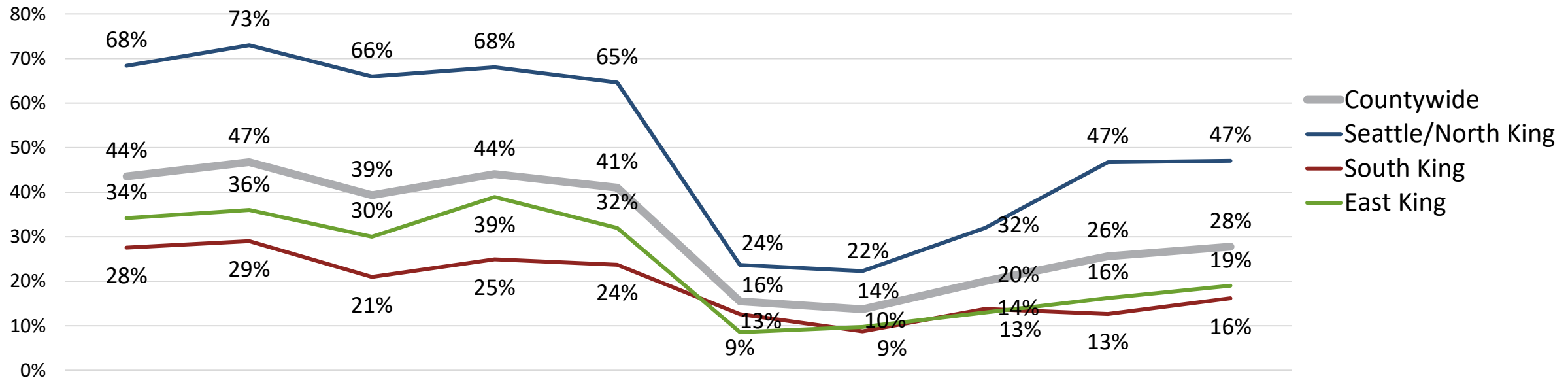
# **Household Rider Share & Rider Behavior**



# Household Rider Market Share Trend – by Subarea

King County Metro's overall market share improved over the course of 2021, recovering from lows measured in Q4 2020 and Q1 2021. Market share remained reduced from levels measured prior to the COVID-19 pandemic.

## % of Households with Metro Riders – Countywide and Subarea Comparison



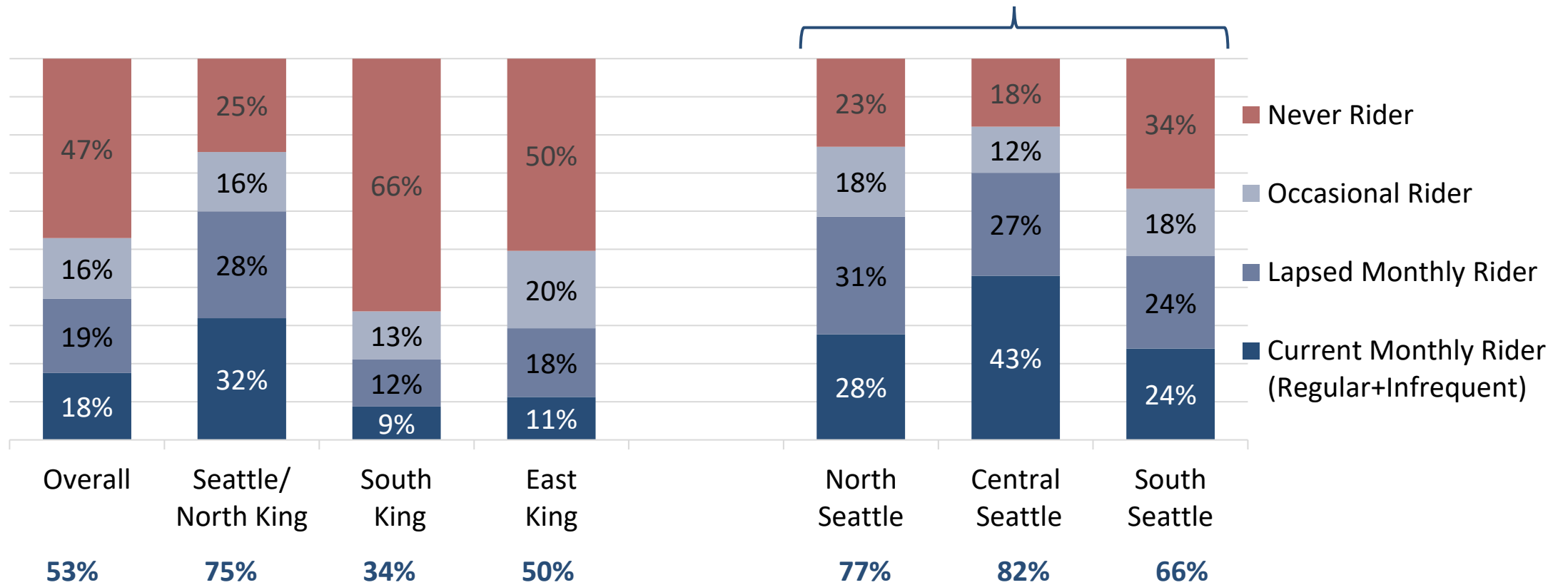
Percentage Change	Q4 2018	Q1 2019	Q2 2019	Q4 2019	Q1 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Overall	-	+3%	-7%	+5%	-3%	-25%	-2%	+6%	+6%	+2%
Seattle/North	-	+5%	-7%	+2%	-3%	-41%	-1%	+10%	+15%	0%
South King	-	+1%	-8%	+4%	-1%	-11%	-4%	+5%	-1%	+3%
East King	-	+2%	-6%	+9%	-7%	-23%	+1%	+3%	+3%	+3%

# Metro Ridership – by Sub-area

Over the course of 2021, Seattle/North King County residents reported higher levels of current ridership than South King and East King residents.

## % Share of Metro Riders and Non-Riders – Sub-area Comparison

Within Seattle/North King



Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus? A round trip counts as two one-way rides.

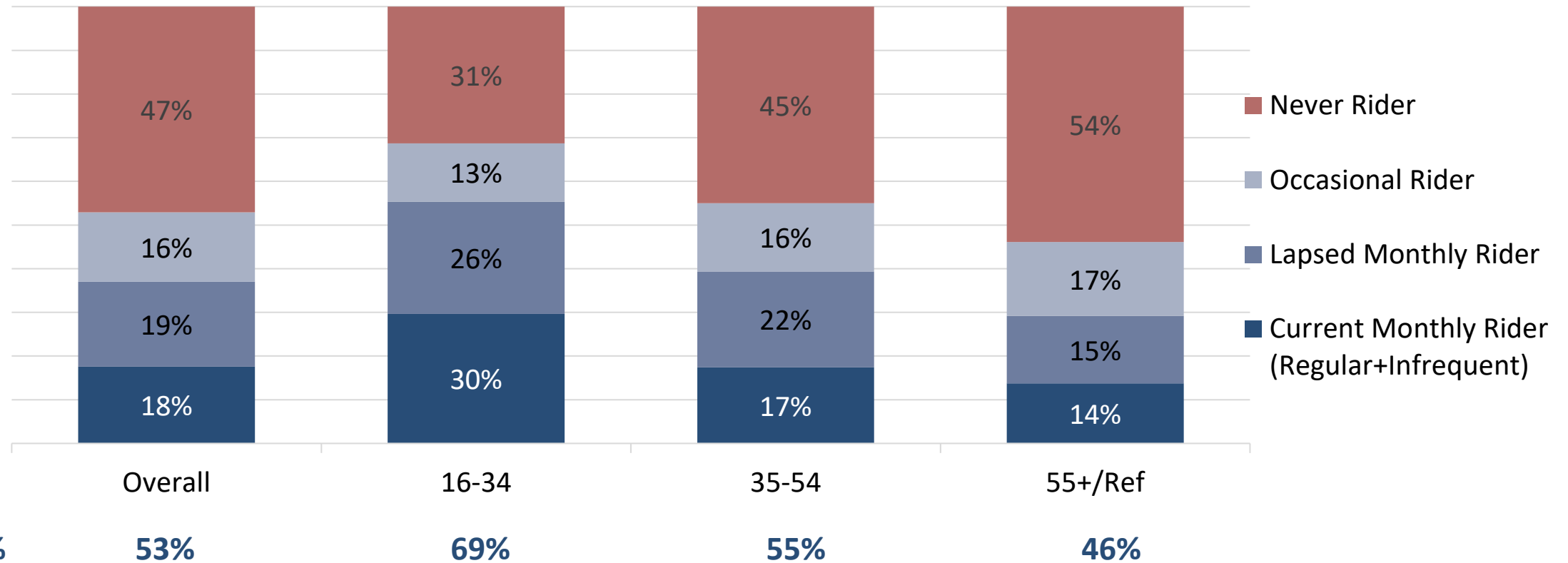
For example, if you commuted to and from work five days a week on a Metro bus, that would be two trips per work day, which would be about 40 rides for the last 30 days.

A one-way trip where you had to transfer counts as one ride.

# Metro Ridership – by Age Category

Ridership was highest in 2021 among residents under 35. More than half of those 55 or older did not travel with King County Metro.

**% Share of Metro Riders and Non-Riders – Sub-area Comparison**

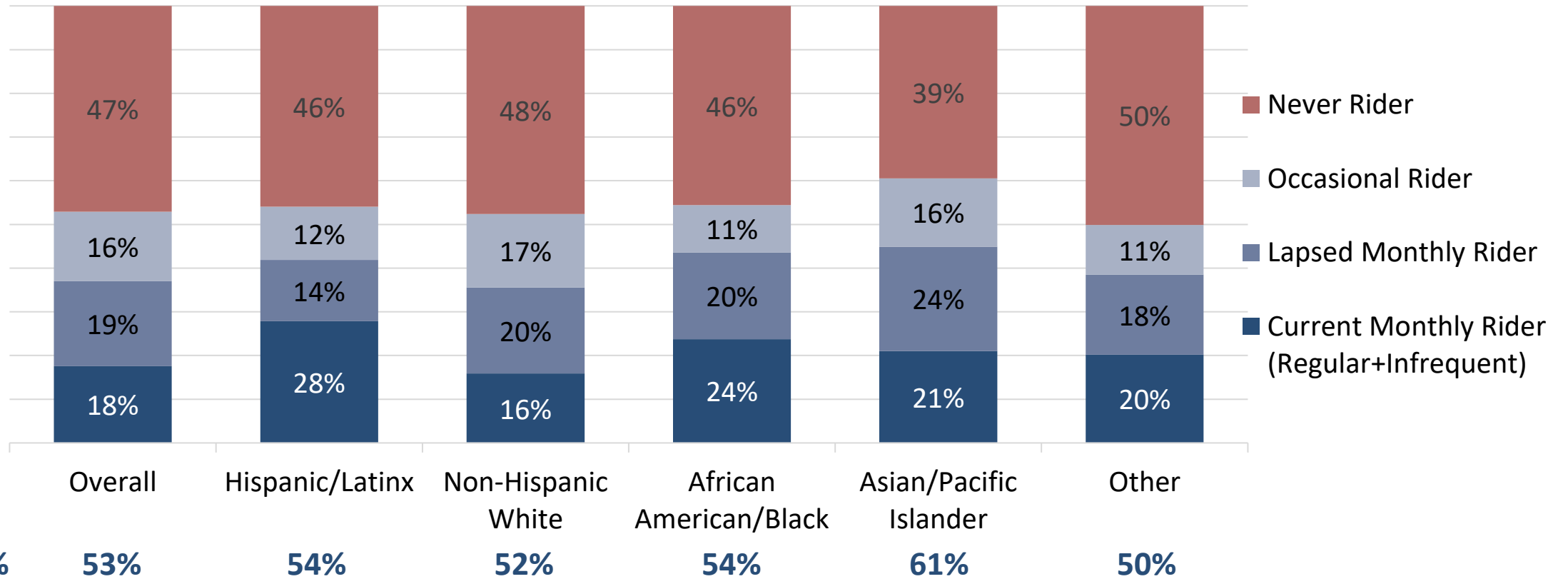


Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus? A round trip counts as two one-way rides. For example, if you commuted to and from work five days a week on a Metro bus, that would be two trips per work day, which would be about 40 rides for the last 30 days. A one-way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

# Metro Ridership – by Ethnicity

Levels of ridership varied by ethnicity, particularly levels of current monthly travel with Metro – fewer than one-in-five White residents indicated currently using Metro, compared to one-in-four Black and Hispanic/Latinx residents.

**% Share of Metro Riders and Non-Riders – Sub-area Comparison**



Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus? A round trip counts as two one-way rides.

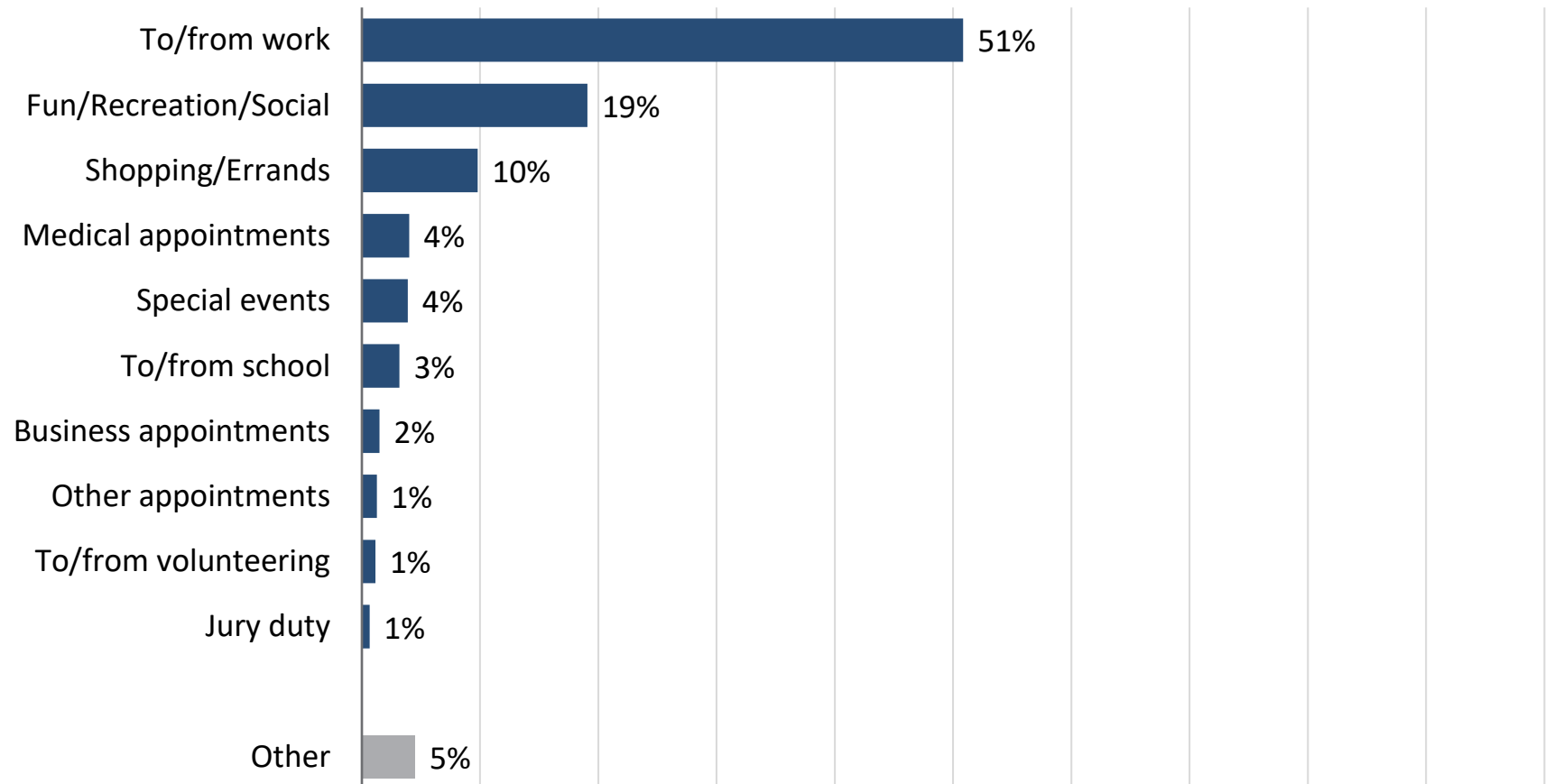
For example, if you commuted to and from work five days a week on a Metro bus, that would be two trips per work day, which would be about 40 rides for the last 30 days.

A one-way trip where you had to transfer counts as one ride.

# Primary Purpose of Metro Bus Trips

Half of those interviewed in 2021 indicated that the purpose of the trip they make most often with Metro is to commute to/from work. One-in-five reported traveling with Metro to attend fun/recreation/social events.

## Primary Purpose of the Trip (Ranked)

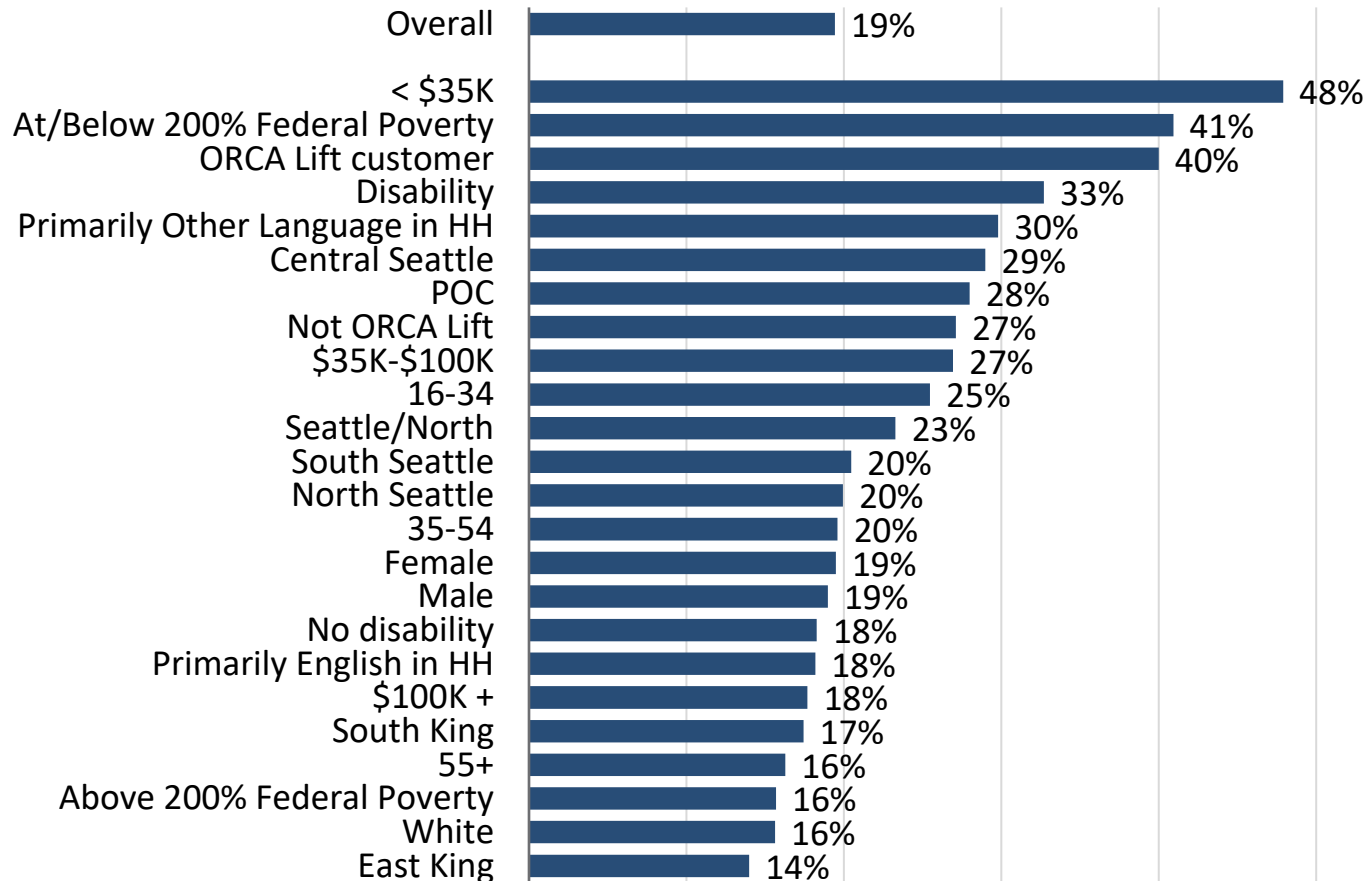


When you ride a Metro bus, what is the primary purpose of the trip or trips you take most often? Select all that apply.  
You indicated that you use Metro bus for multiple purposes. Please rank the purposes in order of most used to least used.

# Metro Bus Reliance - by Subgroup (Ranked)

Nearly half of residents with household incomes below \$35,000 reported using Metro for most or all of their transportation needs. Those living at or below 200% FPL and those with disabilities were also more likely to use Metro for most/all of their transportation needs.

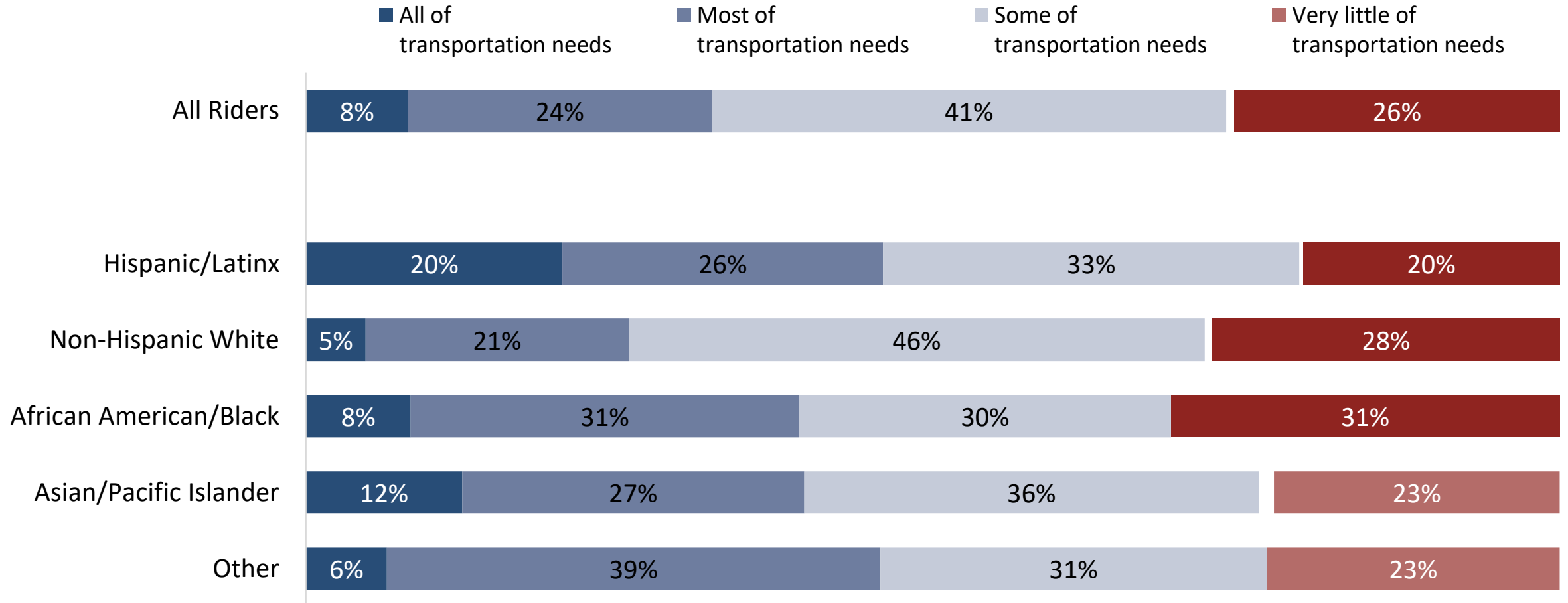
## % of Riders Using Metro Bus for Most or All Transportation Needs – Ranked Subgroups



Now, thinking about all your travel around King County, to what extent do you use a Metro bus to get around? Do you use a Metro bus for...

# Metro Bus Reliance – by Ethnicity

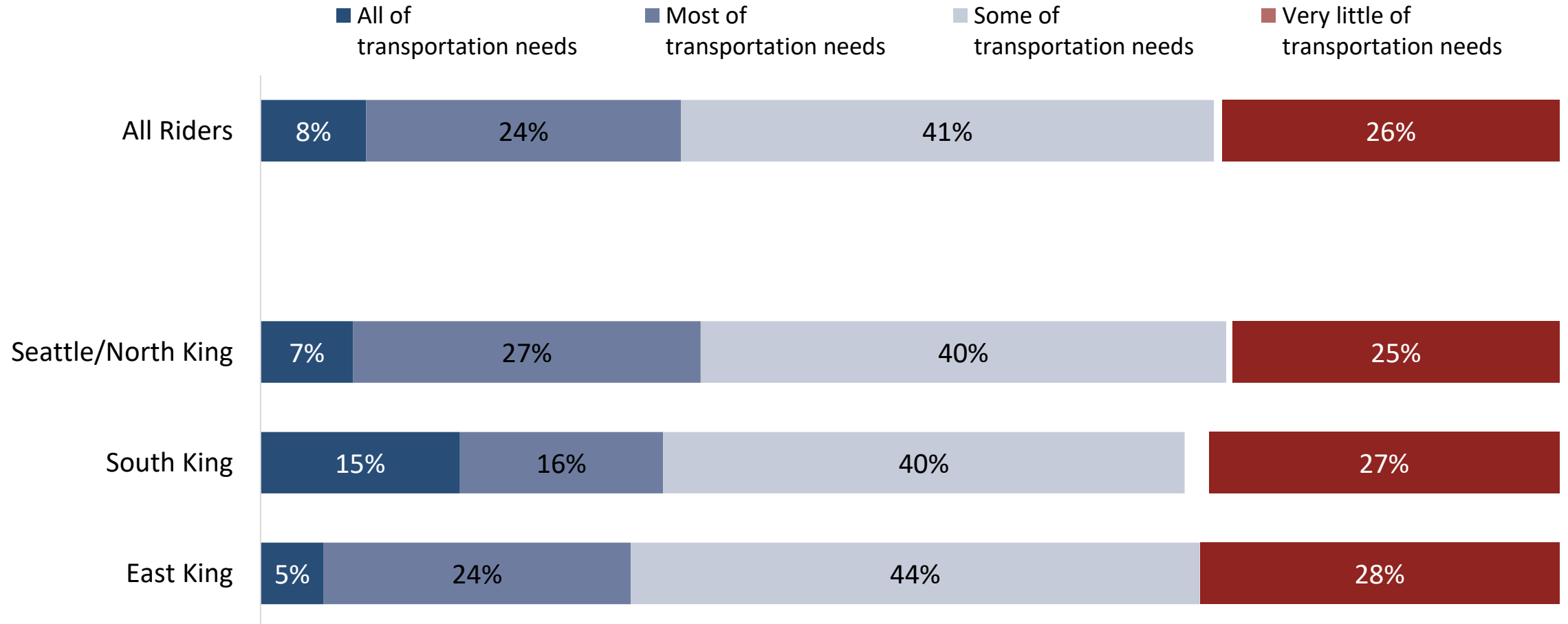
Level of Metro Bus Reliance Among Riders – Ethnicity Comparison



Now, thinking about all your travel around King County, to what extent do you use a Metro bus to get around? Do you use a Metro bus for...

# Metro Bus Reliance – by Region

## Level of Metro Bus Reliance Among Riders – Region Comparison

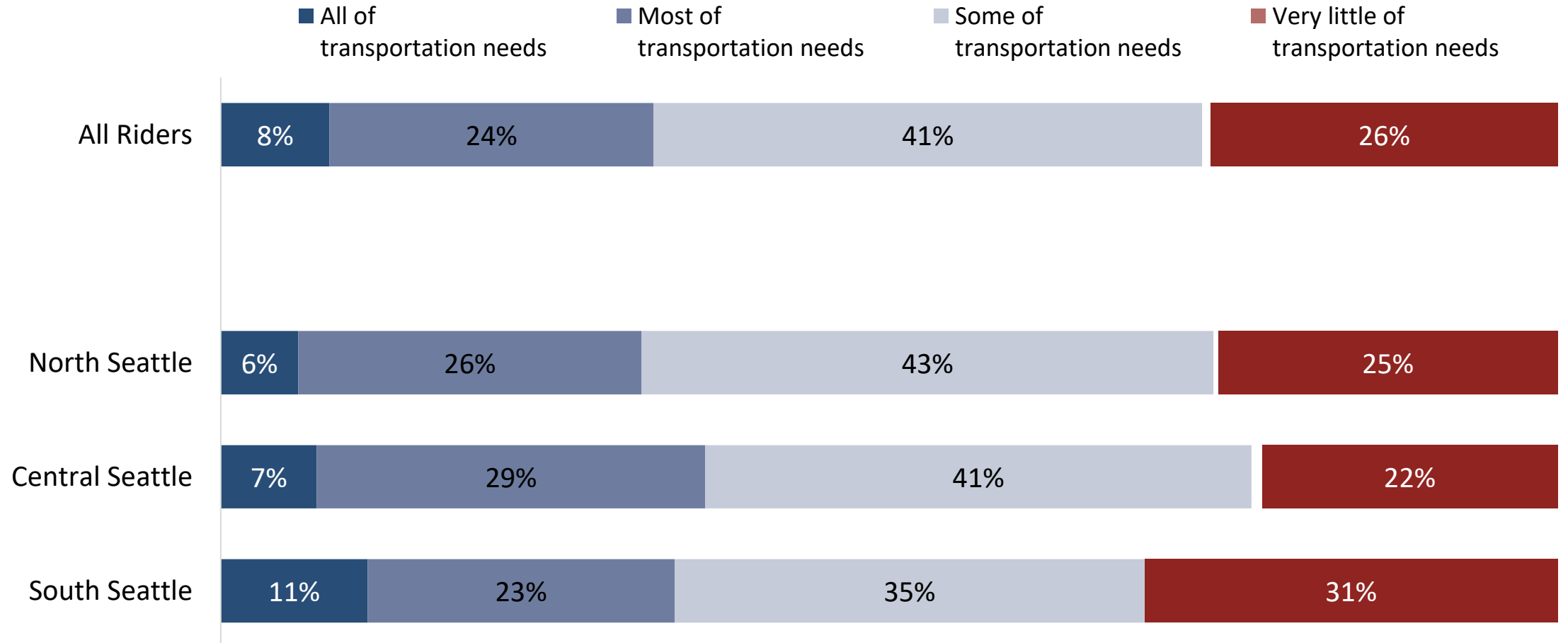


Now, thinking about all your travel around King County, to what extent do you use a Metro bus to get around? Do you use a Metro bus for...



# Metro Bus Reliance – by Region

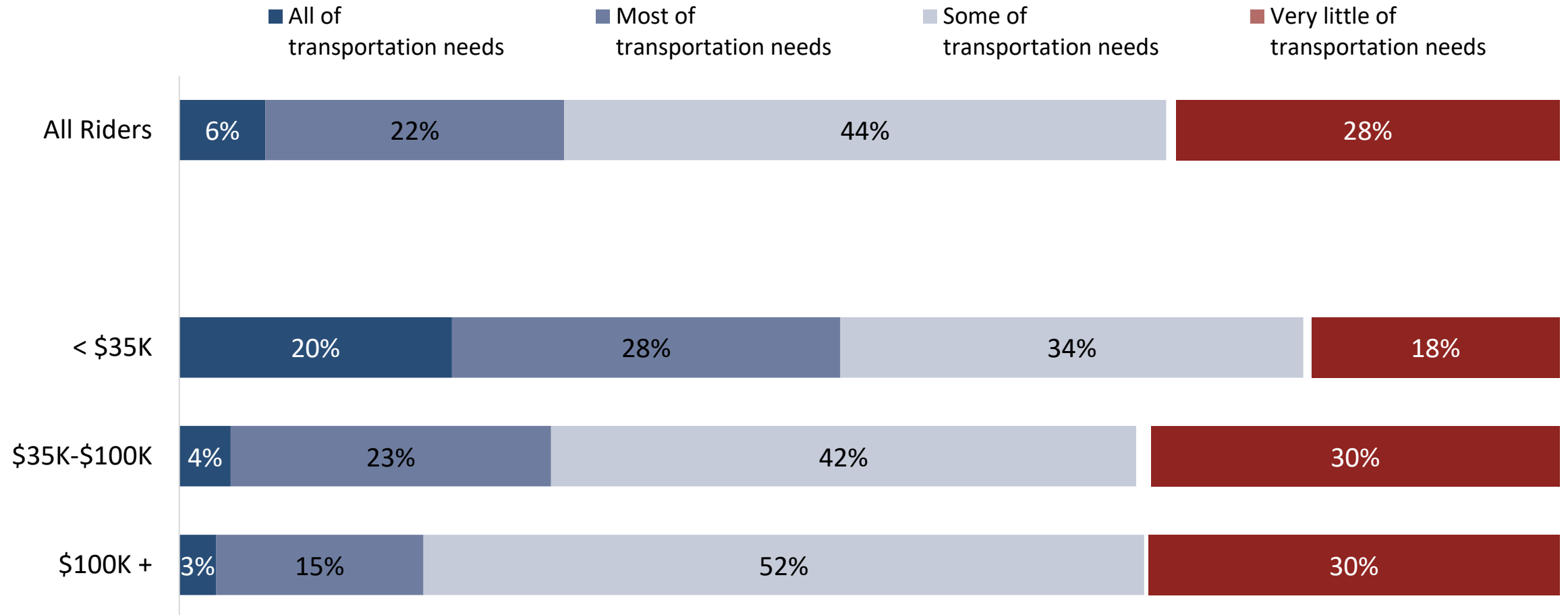
## Level of Metro Bus Reliance Among Riders – Region Comparison



Now, thinking about all your travel around King County, to what extent do you use a Metro bus to get around? Do you use a Metro bus for...

# Metro Bus Reliance – by Household Income

### Level of Metro Bus Reliance Among Riders



Now, thinking about all your travel around King County, to what extent do you use a Metro bus to get around? Do you use a Metro bus for...

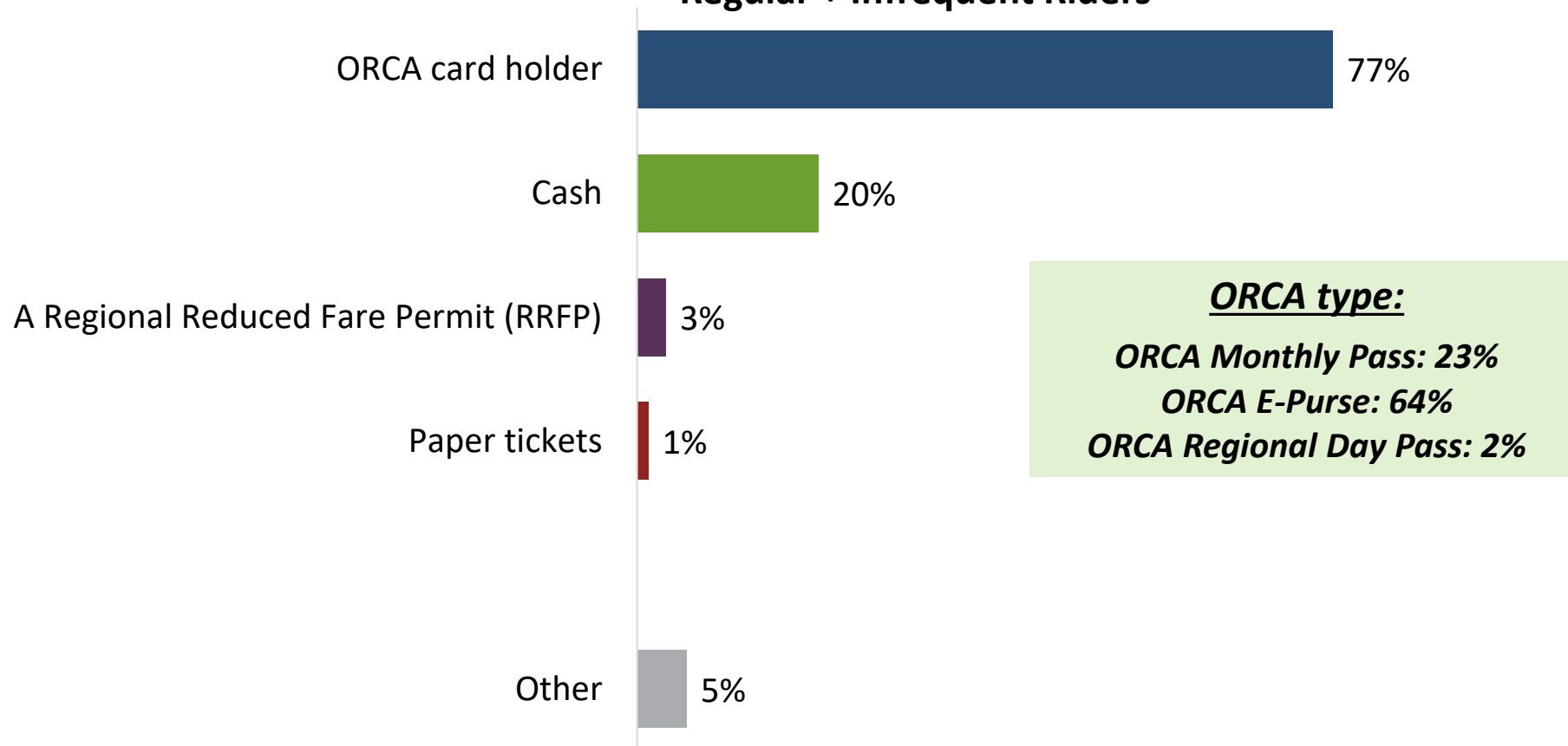
**Fare Payment**

# Q4 Fare Payment Method – Riders

Just above three-in-four Metro riders reported paying for their bus fare with an ORCA card, compared to just one-in-five who continued to pay their fares with cash.

## Usual Method of Fare Payment (Multi-Response; Not Mutually Exclusive Categories)

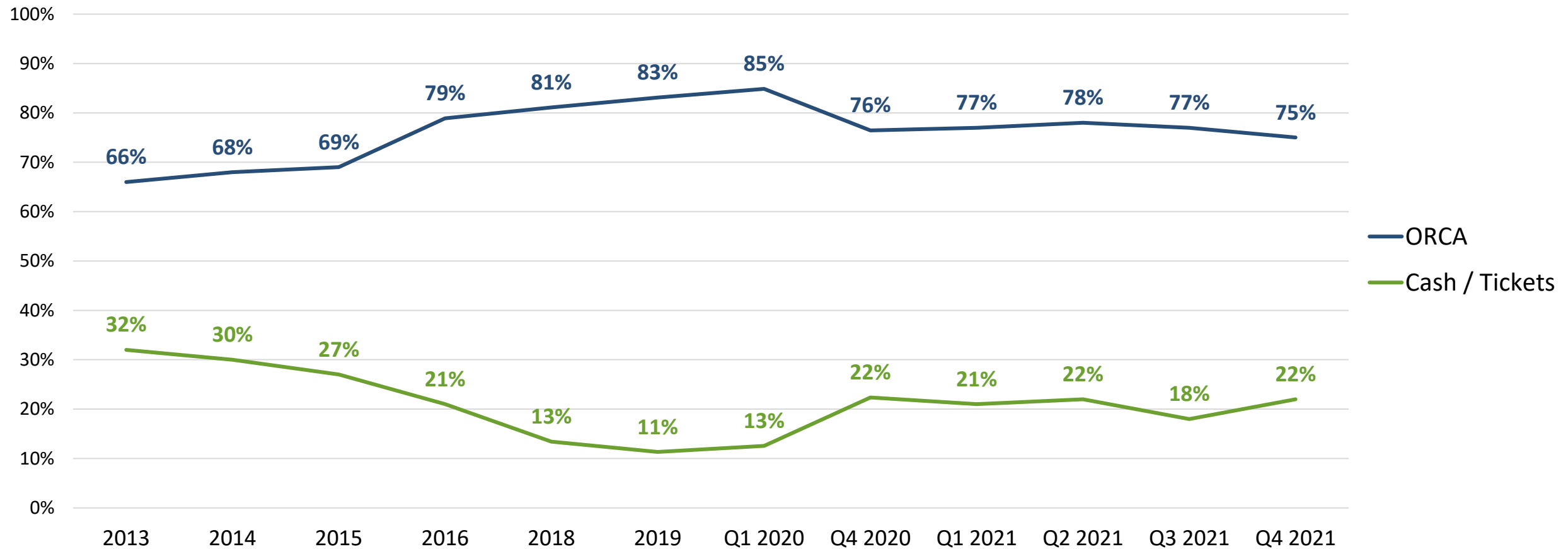
### Regular + Infrequent Riders



# Fare Payment Trend – Riders

*Use of ORCA cards was steady relative to the onset of the pandemic.*

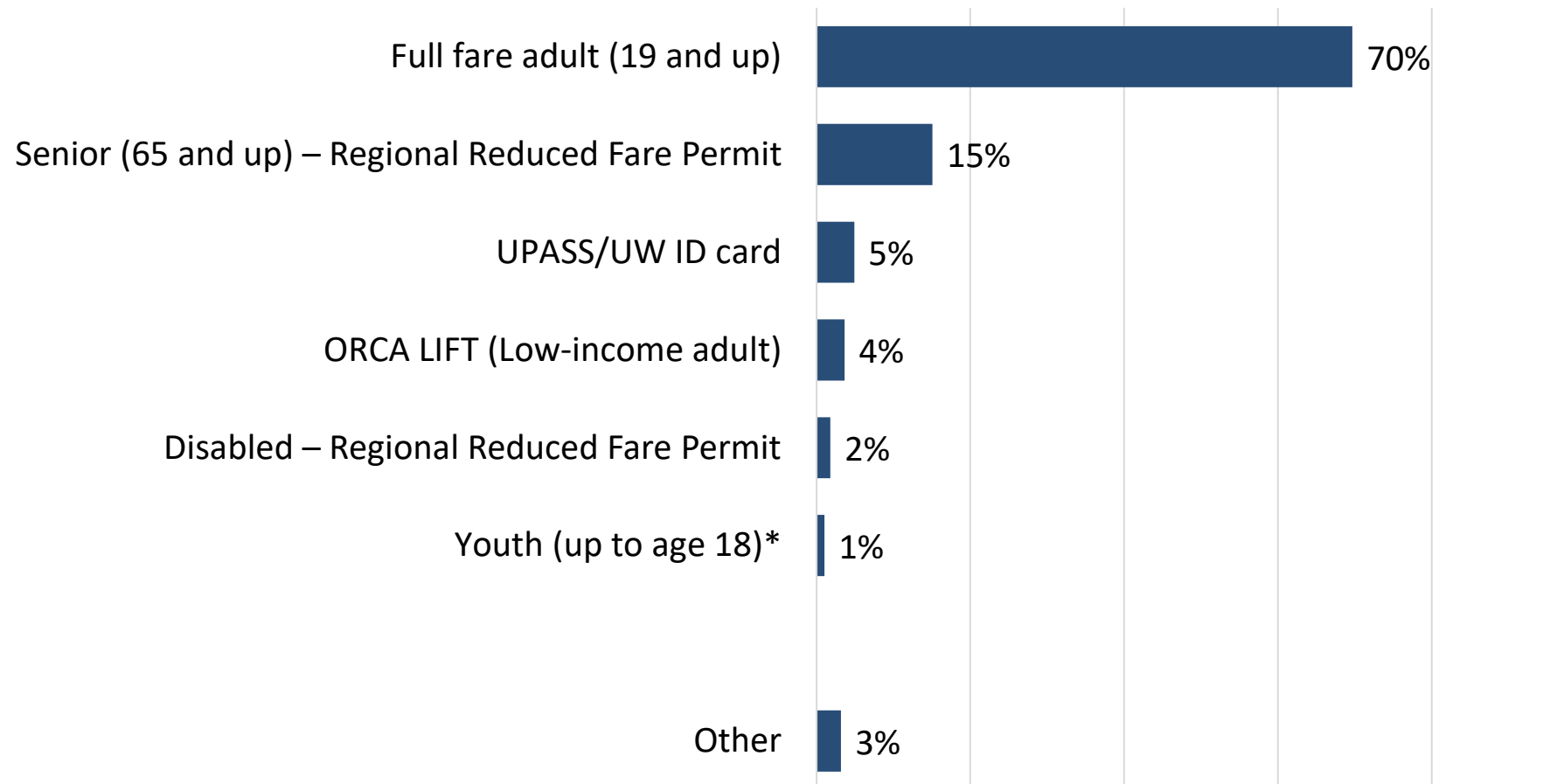
### Fare Payment Method Over Time – Regular + Infrequent Riders



# Customer Fare Category

Seven-in-ten customers indicated that they fall into the “full fare adult” customer fare category.

## Customer Fare Category – Overall Riders



*\*Please note, only residents aged 16 and up are requested to participate in this study.*

# **Employment & Commute Behavior**

# Employment Profile – All Respondents

		All Residents Countywide	Seattle/ North King	South King	East King	Current Monthly Rider	Lapsed Monthly Rider	Occasional Rider	Never Rider
Current Employment	Employed	65%	69%	62%	66%	70%	74%	63%	61%
	Retired	22%	19%	24%	22%	15%	14%	24%	26%
	Currently not employed	5%	5%	6%	4%	6%	6%	6%	5%
	Homemaker	5%	2%	5%	8%	2%	4%	6%	6%
	Student	4%	5%	3%	3%	7%	4%	4%	2%
	Disabled	3%	3%	4%	1%	5%	2%	2%	3%
COVID-19 Employment Impacts	Hours cut	8%	8%	11%	6%	11%	7%	10%	8%
	Lost a job	9%	10%	11%	6%	14%	9%	9%	8%
	Pay cut	4%	4%	5%	4%	4%	3%	4%	5%
Current Work from Home Status	Working from home	52%	58%	42%	57%	48%	67%	50%	45%
	Commuting to work	28%	24%	38%	23%	34%	16%	25%	36%
	Neither	8%	8%	9%	9%	4%	9%	13%	8%
	Both	10%	10%	10%	10%	13%	8%	11%	10%
Essential Job Classification	Essential job	41%	34%	57%	33%	40%	29%	39%	50%
	Non-essential job	59%	66%	43%	67%	60%	71%	61%	50%



# Employment Profile – All Respondents

		Yearly	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Current Employment	Employed	65%	65%	67%	65%	65%
	Retired	22%	21%	20%	21%	24%
	Currently not employed	5%	6%	6%	5%	5%
	Homemaker	5%	5%	5%	6%	4%
	Student	4%	3%	4%	4%	3%
	Disabled	3%	2%	3%	3%	3%
COVID-19 Employment Impacts	Hours cut	8%	8%	9%	-	-
	Lost a job	9%	9%	9%	-	-
	Pay cut	4%	4%	5%	-	-
Current Work from Home Status	Working from home	52%	58%	47%	-	-
	Commuting to work	28%	25%	32%	-	-
	Neither	8%	8%	9%	-	-
	Both	1%	8%	12%	-	-
Essential Job Classification	Essential job	41%	40%	43%	41%	41%
	Non-essential job	59%	60%	57%	59%	59%

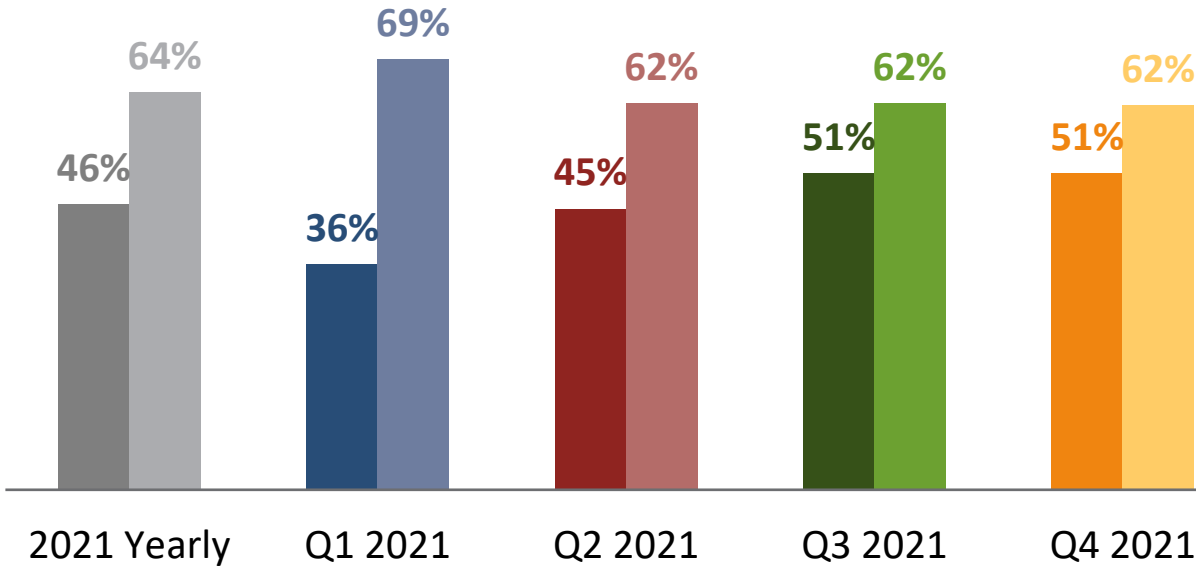
# Commuting and Telecommuting Frequency Trend – Commuters

Nearly two-thirds of commuters (those indicating employment or status as a student) indicated telecommuting at least once per week. Throughout the course of 2021, commuters indicated increasing levels of commuting and decreasing levels of telecommuting in each individual quarter, though by Q4 2021 rates of telecommuting still surpassed rates of commuting to physical locations.

## Currently: Among All Commuters (Employed or Students)

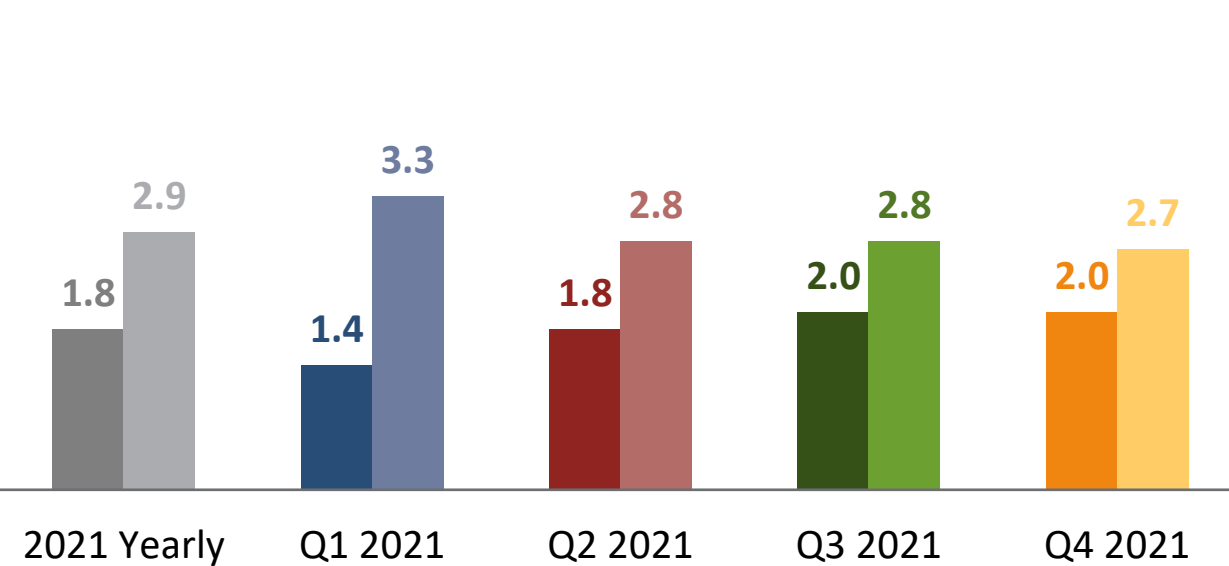
### 1+ days/week

■ Commuting ■ Telecommuting



### Mean days/week

■ Commuting ■ Telecommuting



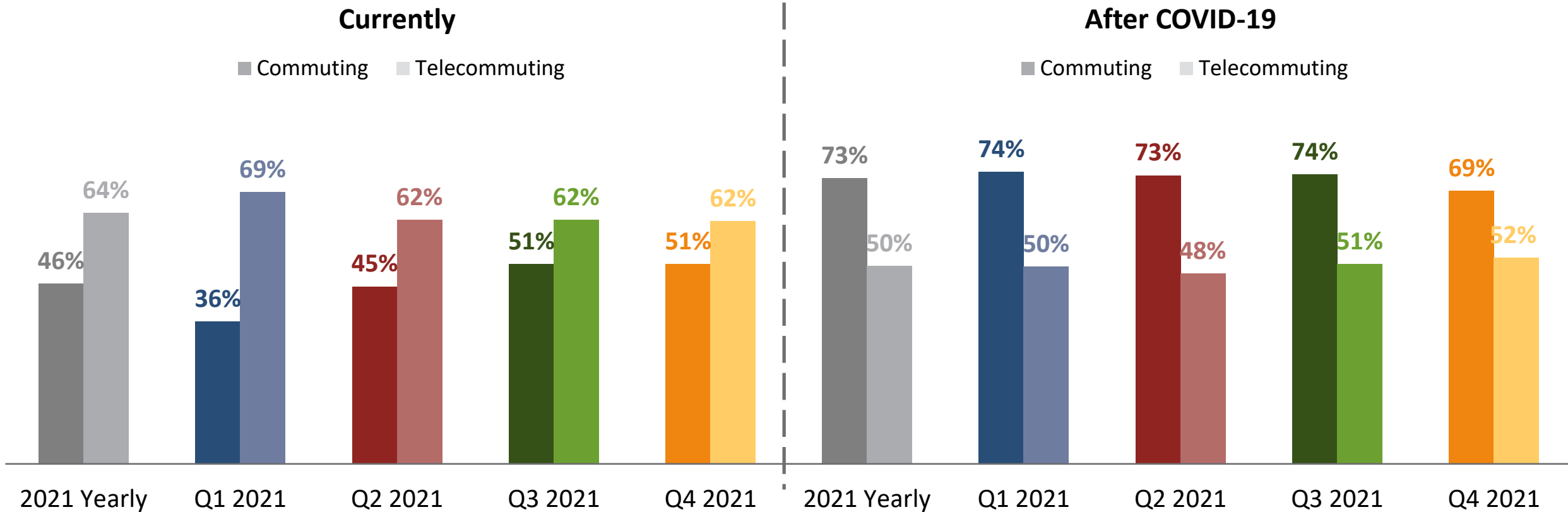
On average, how often did you or do you plan to travel to a fixed worksite or school during each of the following time periods?

Now we'd like to ask about telecommuting or working from home. On average, how often did you or do you plan to telecommute/work from home during each of the following time periods?

# Commuting and Telecommuting Frequency Trend – Commuters

While reported levels of telecommuting and commuting shifted quarter-on-quarter in 2021, predicted rates of commuting and telecommuting were steadier throughout the course of the year.

## 1+ days/week: Among All Commuters (Employed or Students)



On average, how often did you or do you plan to travel to a fixed worksite or school during each of the following time periods?

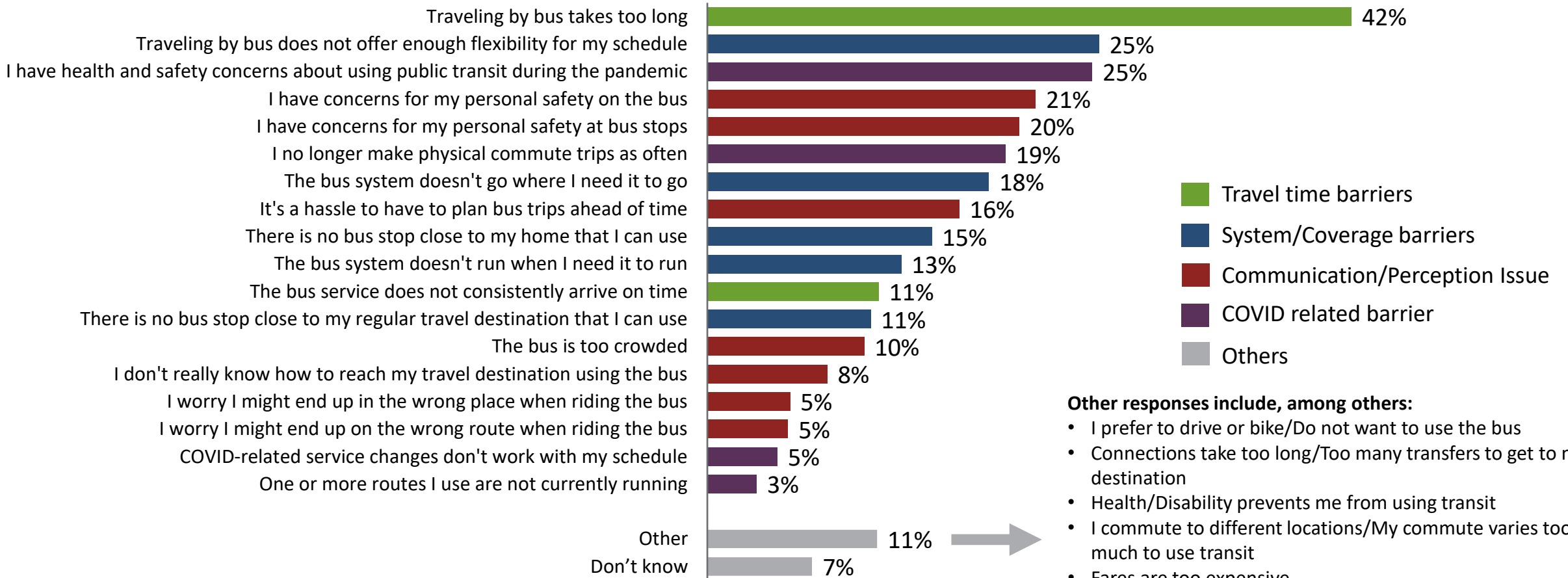
Now we'd like to ask about telecommuting or working from home. On average, how often did you or do you plan to telecommute/work from home during each of the following time periods?

# **Top of Mind Barriers & Incentives**

# Barriers to Increased Ridership – All Residents

Two-in-five residents indicated that travel times by bus kept them from riding more often. One quarter indicated that traveling by bus did not offer enough flexibility, and a similar share of residents indicated health/safety concerns related to the ongoing COVID-19 pandemic.

**Below are a number of barriers which some people say keep them from riding the bus more often. Please select any barriers that apply to you.**



- Other responses include, among others:**
- I prefer to drive or bike/Do not want to use the bus
  - Connections take too long/Too many transfers to get to my destination
  - Health/Disability prevents me from using transit
  - I commute to different locations/My commute varies too much to use transit
  - Fares are too expensive
  - Mentions of homeless/no destination riders

Please select any barriers that apply to you. (MULTIPLE RESPONSES ACCEPTED)

# Barriers to Increased Ridership Trend

*Perceptions of the travel time by bus were relatively steady throughout the year, while health/safety concerns related to the pandemic were higher in quarters 3 and 4 of 2021.*

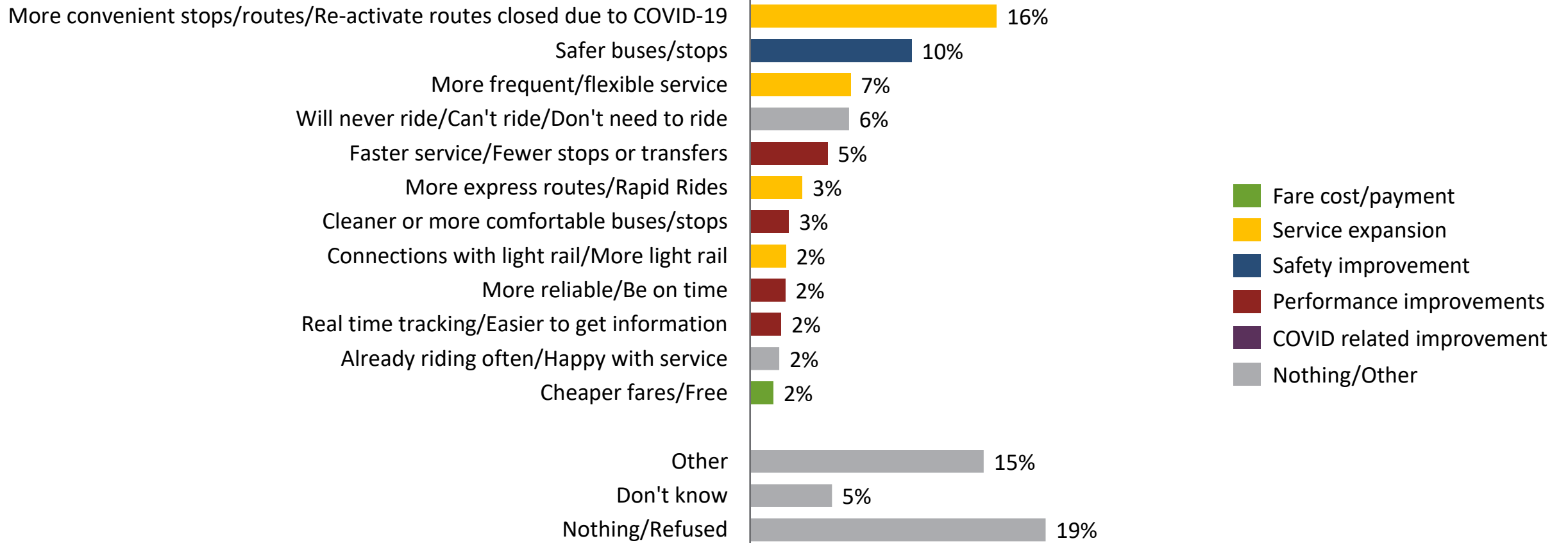
***Below are a number of barriers which some people say keep them from riding the bus more often. Please select any barriers that apply to you.***

All Residents	2021 Yearly	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Traveling by bus takes too long	42%	40%	42%	41%	44%
Traveling by bus does not offer enough flexibility for my schedule	25%	30%	27%	25%	26%
I have health and safety concerns about using public transit during the pandemic	25%	22%	21%	25%	23%
I have concerns for my personal safety on the bus	21%	23%	21%	21%	21%
I have concerns for my personal safety at bus stops	20%	22%	20%	21%	21%
I no longer make physical commute trips as often	19%	19%	18%	18%	19%
The bus system doesn't go where I need it to go	18%	18%	17%	19%	19%
It's a hassle to have to plan bus trips ahead of time	16%	16%	16%	18%	16%
The bus system doesn't run when I need it to run	13%	11%	13%	13%	13%
There is no bus stop close to my home that I can use	11%	14%	13%	14%	17%
The bus service does not consistently arrive on time	11%	11%	13%	11%	10%
There is no bus stop close to my regular travel destination that I can use	11%	10%	10%	12%	10%
The bus is too crowded	10%	10%	11%	11%	8%
I don't really know how to reach my travel destination using the bus	8%	8%	6%	8%	9%
I worry I might end up in the wrong place when riding the bus	5%	5%	5%	6%	6%
I worry I might end up on the wrong route when riding the bus	5%	5%	5%	5%	6%
COVID-related service changes don't work with my schedule	5%	3%	3%	5%	5%
One or more routes I use are not currently running	3%	5%	4%	3%	3%
Other	11%	12%	11%	11%	10%
Don't know	8%	6%	7%	7%	7%

# Top-of-Mind Suggestions – All Residents

Respondents gave varied responses when asked what Metro could do to make future ridership more likely. The top suggestions were more convenient stops/routes and reactivating routes closed during the COVID-19 pandemic, with 16% of King County residents suggesting such changes.

*In general, what is the main thing King County Metro could do to make you more likely to ride the bus more often in the future?*



# Top-of-Mind Suggestions Trend

*Mentions of safer buses/stops and more frequent/flexible services decreased throughout the course of the year, while those saying that they would never ride Metro were highest in Q4.*

*In general, what is the main thing King County Metro could do to make you more likely to ride the bus more often in the future?*

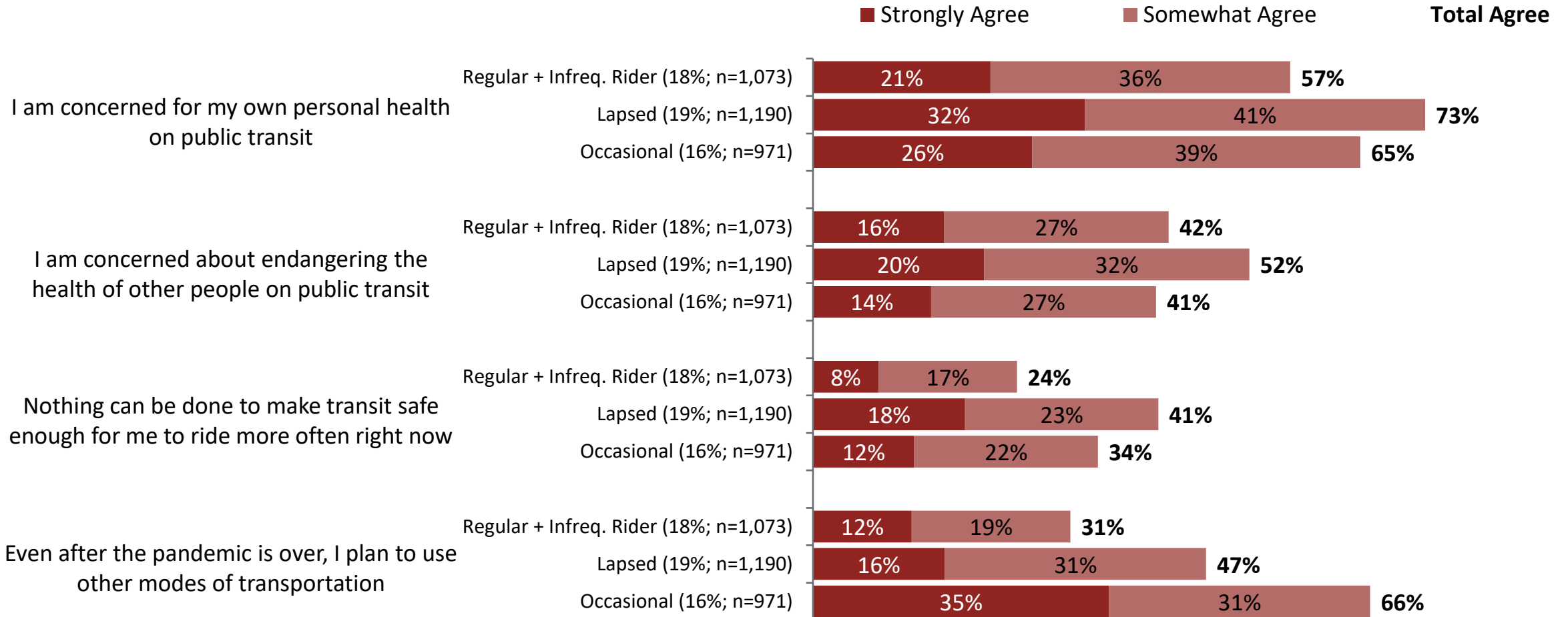
	2021 Yearly	Q1 2021	Q2 2021	Q3 2021	Q4 2021
More convenient stops/routes/Re-activate routes closed due to COVID-19	16%	-	16%	21%	16%
Safer buses/stops	10%	-	13%	11%	10%
More frequent/flexible service	7%	-	10%	7%	3%
Will never ride/Can't ride/Don't need to ride	6%	-	0%	3%	7%
Faster service/Fewer stops or transfers	5%	-	6%	9%	4%
Cleaner or more comfortable buses/stops	3%	-	4%	2%	2%
More express routes/Rapid Rides	3%	-	2%	1%	1%
Real time tracking/Easier to get information	2%	-	2%	5%	2%
Cheaper fares/Free	2%	-	1%	4%	2%
Connections with light rail/More light rail	2%	-	3%	3%	1%
Already riding often/Happy with service	2%	-	1%	2%	1%
More reliable/Be on time	2%	-	2%	3%	1%
Expanded service hours	1%	-	1%	2%	2%
Enforcing COVID-19 precautions (Masking, Limited Capacity, etc.)	1%	-	4%	0%	0%
Less crowding on buses/More capacity	1%	-	3%	2%	0%
Other	13%	-	12%	8%	7%
Don't know	5%	-	3%	4%	5%
Nothing/Refused	19%	-	15%	14%	34%



# **COVID-19 Impacts & Perceptions**

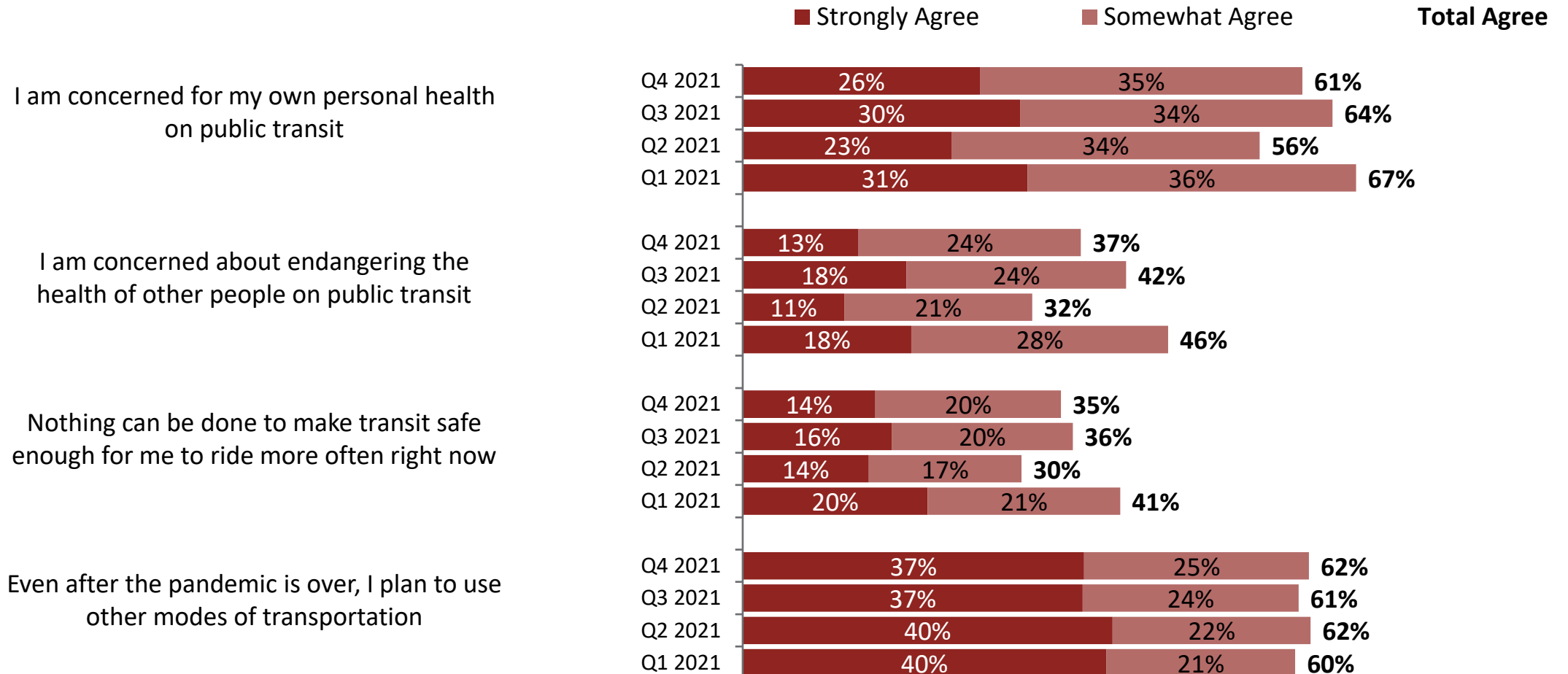
# Barriers to Riding – by Rider Type

Among those traveling with Metro at least monthly, more than half indicated concern for their own personal health on transit. Occasional riders, traveling with Metro less than monthly, were most likely to agree that they will use other modes of transportation, even after the pandemic is over.



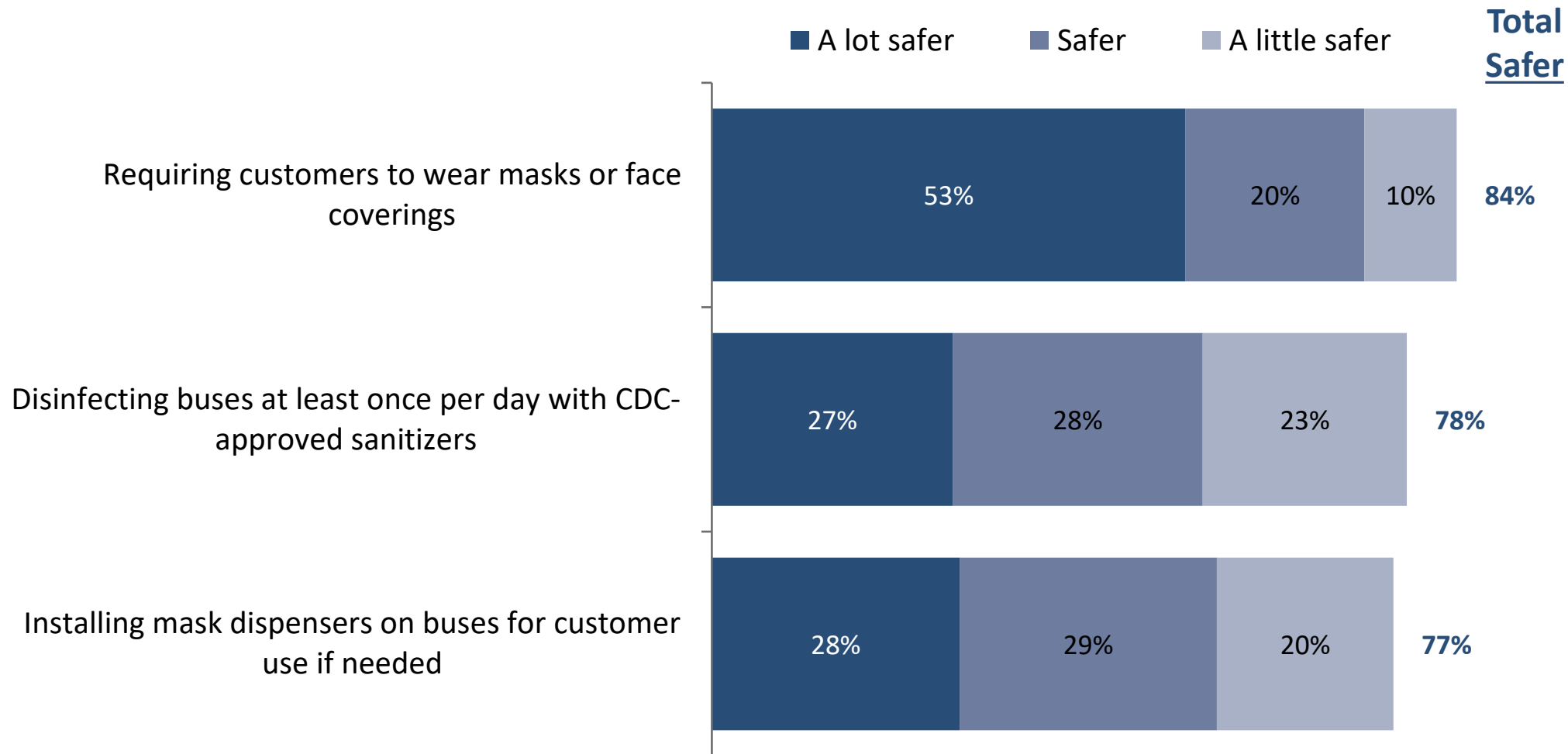
# Barriers to Riding Trend

Concern for both personal health and the health of others on transit decreased in Q2 2021 before returning to previously-measured levels in Q3. Steady agreement with the statement “Even after the pandemic is over, I plan to use other modes of transportation” reflected a share of the population that is not open to using transit, regardless of the current health situation.



# Response Actions – All Residents

*More than half of residents indicated that a mask mandate made them feel “a lot safer.”*



For each of the following actions Metro has taken in response to the coronavirus public health crisis, please rate the degree to which that action would make you feel safer riding a Metro bus or not.

# **Resident Demographic Profile**

# Demographics – All Residents by Quarter

	2021 Yearly	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Regular + Infrequent Rider	18%	11%	15%	21%	23%
Non-Rider	82%	89%	85%	79%	77%
Lapsed Monthly	19%	27%	21%	16%	14%
Occasional	16%	16%	17%	14%	16%
Never	47%	46%	46%	49%	48%
Male	47%	46%	48%	47%	48%
Female	48%	48%	48%	48%	48%
Other/Ref	5%	6%	4%	5%	5%
16-34	15%	18%	15%	15%	14%
35-54	38%	38%	40%	39%	35%
55+/Ref	47%	45%	45%	46%	52%
Male 16-44	16%	16%	17%	16%	13%
Male 45+	32%	31%	31%	31%	34%
Female 16-44	16%	18%	16%	16%	14%
Female 45+	31%	30%	31%	31%	33%
<\$35K/year	12%	11%	12%	13%	13%
\$35K-\$100k/year	31%	33%	32%	30%	29%
+ \$100K/year	40%	39%	39%	41%	42%
Ref	17%	17%	16%	17%	16%
At/Below 200% Federal Poverty	13%	13%	13%	13%	13%
Above 200% Federal Poverty	70%	70%	70%	69%	71%

# Demographics – All Residents by Quarter

	2021 Yearly	Q1 2021	Q2 2021	Q3 2021	Q4 2021
White	60%	61%	59%	60%	60%
POC	31%	29%	32%	30%	31%
Black/African American	4%	3%	5%	4%	5%
Asian or Pacific Islander	15%	15%	16%	15%	15%
Hispanic	6%	6%	7%	6%	6%
Other	5%	6%	5%	5%	4%
Ref	9%	10%	9%	10%	9%
Primarily English HH	86%	84%	87%	88%	85%
Other language HH	9%	10%	7%	6%	11%
Ref	6%	6%	6%	6%	4%
ORCA card user	77%	77%	77%	78%	77%
Cash/Tickets only	21%	21%	23%	19%	23%
ORCA LIFT customer	2%	3%	2%	2%	2%
LIFT eligible (19-64; <=200% FPL)	9%	9%	10%	9%	8%
Not eligible (19-64; >200% FPL)	62%	65%	63%	61%	58%
Unknown Income / Not 19-64	29%	26%	27%	30%	33%
Metro most/all trips	19%	22%	20%	20%	16%
Metro little/some trips	80%	78%	80%	79%	83%
Household owns a vehicle	90%	90%	91%	91%	91%
Household does not own a vehicle	10%	6%	5%	6%	5%
Rider with disability	8%	7%	9%	8%	9%
Rider w/ no disability	92%	87%	86%	86%	86%



**Andrew Thibault**  
**andrew@emcresearch.com**  
**206.769.7384**

**Brian Vines**  
**brian@emcresearch.com**  
**206.204.8034**

**Aaron Kelley**  
**aaron@emcresearch.com**  
**614.827.9679**