ORCInternational

2011 Rider / Non-Rider Survey

Submitted to:
King County Metro

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Background and Methodology

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

- Provide a reliable measure of market share—that is the percentage of households in King County with one or more riders
- Track customer awareness and perceptions of Metro services
- Identify and track demographic, attitudinal, and transit use characteristics among riders, non-riders, and commuters
- Provide insights on current and relevant topics that are a current focus of Metro's service, marketing, and communications strategies

The 2011 survey was based on a random telephone sample of 2,521 King County residents aged 16 and older. Both riders and non-riders were surveyed in 2011.

Regular Riders
n = 1,241

- Residents 16 and older
- Five or more trips on a Metro bus or streetcar in 30 days preceding the survey, excluding those who rode entirely in the Seattle Ride Free Area (RFA)

Infrequent Riders
n = 214

- Residents 16 and older
- One to four trips on a Metro bus or streetcar in the last 30 days, excluding those who rode entirely in the RFA

Non-Riders
n = 1,066

- Residents 16 and older
- Zero trips on a Metro bus or streetcar in the 30 days preceding the survey, other than buses in the RFA

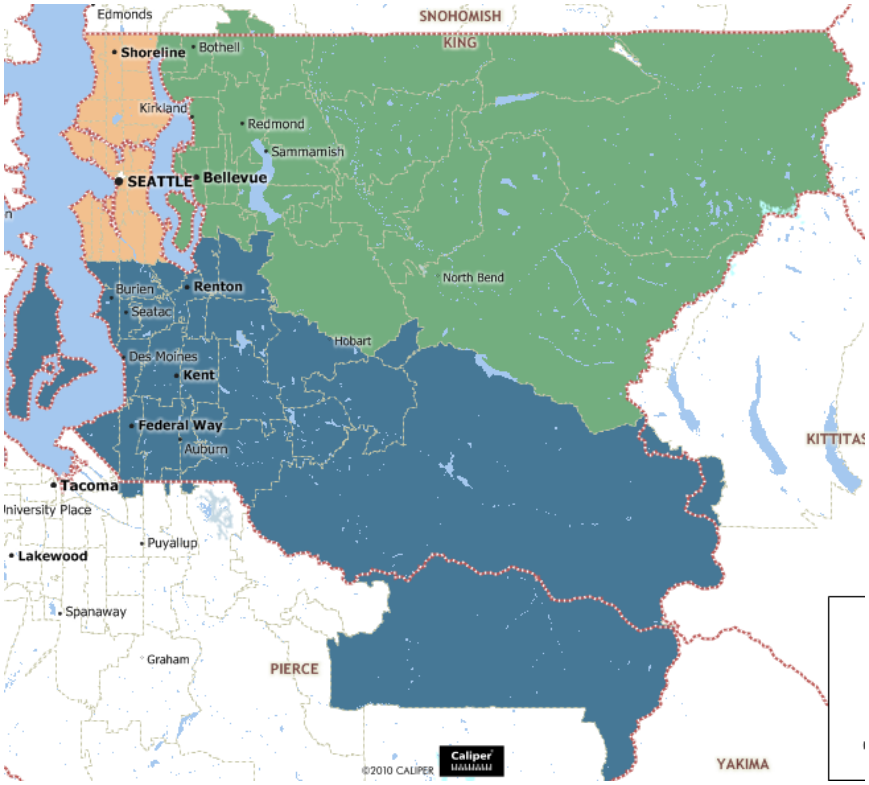
To provide the ability to do reliable analysis across the region served by Metro, the sample is stratified using the boundaries of Metro's former planning areas. A similar number of interviews are completed in each area.

	n =
Seattle / North King County	844
South King County	866
East King County	**811**
Total	2,521

Finally, to ensure representation of low-income households (<$35,000 total household income), supplemental sampling was undertaken—26 percent of the final sample met this definition, roughly in proportion to the general population (25%).

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

The margin of error of the entire sample is plus or minus 2.0 percentage points.



To address the growing prevalence of cell phone-only households in King County—estimated to be as high as 32 percent of all households—a dual frame sample methodology was used.

Thirty percent of all interviews were completed with respondents reporting that they either only or primarily use a cell phone.

	2009	2010	2011
Cell Phone Sample	240	254	759
Landline Sample	2,185	886	1,762
Total	2,425	1,140	2,521

Executive Summary

Topic	Key Findings	Key Stats	Implications
Market Share	The percentage of King County households with one or more Regular Riders (those taking 5 or more one-way rides per month) has held stable over the years. Seattle / North King County continues to be the system's core market.	% Regular Rider Households **26%** Seattle / N. King **41%**	Metro has maintained its share of Regular Rider households despite declines in employment and changing employment patterns. Frequent and destination-specific service contributes to market share in Seattle / N. King County. New services in South King County are contributing to growth in this region.
	The percentage of Infrequent Rider households decreased in 2011 with a corresponding increase in the percentage of Non-Rider households.	% Infrequent Rider Households **9%** % Non-Rider Households **65%**	While not statistically significant this trend should be carefully monitored as Infrequent Riders represent a significant opportunity market for incremental ridership.
Transit Use	After years of steady decreases, the number of one-way trips riders takes increased significantly. Metro's most frequent riders (taking 10+ trips / month) and infrequent riders (taking 1 – 4 trips month) contributed to this increase.	2011 **16.6** one-way trips 2010 **14.0** one-way trips.	Metro' s ridership gains can be attributed to this increase in riding frequency rather than growth in the number of customers (beyond growth that occurred because of population growth).
	Metro customers are increasingly reliant on Metro for all or most of their transportation needs.	% Rely On Metro All / Most Trips 2011 **36%** 2010 **28%**	Despite cuts in service, the benefits of riding Metro appear to outweigh the costs of driving alone. Increased frequency of riding and greater reliance on Metro suggests that riders are using Metro for more than just their primary trips. This increase may also reflect higher representation of less affluent riders who are frequent riders..
	After a slow but steady decline in the percentage of those using Metro to commute, this trend reversed in 2011, returning to levels prior to the economic downturn.	Commute Trips 2011 **56%** 2010 **53%**	The improving economy may be contributing to this trend. While Metro can benefit significantly from increased commute trips, the importance of non-

Topic	Key Findings	Key Stats	Implications
			commute travel should not be under-stated.
Transfers	The number of transfers riders take and wait time when transferring increased in 2011.	% Transferring **51%** Average Wait **14.2** mins.	Given the influence of transfer rates and wait time on the most important transit service elements—travel time and service availability—care must be taken in developing an efficient system while maintaining a level of service customers expect.
Fare Payment	More than three out of five riders now use the ORCA Card to pay their fares. However, a significant number continue to use cash. Income appears to be a major driver in the choice of fare payment media—35% of those with household incomes below $35,000 use cash. Frequency of riding is also a factor.	ORCA **63%** Cash **28%**	Metro has been highly successful in transitioning riders to the ORCA Card, due in part to its convenience but also to a strong marketing effort. Additional gains will require options for low-income households to purchase trips without large cash outlays or credit card access and encouraging Infrequent Riders to use a E-Purse.
	One out of three (31%) riders always use cash; an additional 27% sometimes use cash. Cash use is higher among less affluent riders. One out of three riders who current pay with cash would respondent negatively (i.e., stop riding or ride less) if Metro no longer accepted cash on the bus.	Response if cash not accepted on bus Stop Riding / Ride Less **36%**	Cost of a monthly pass and access to credit or debit cards may make it difficult for less affluent riders to use an ORCA Card.
	Fewer riders report receiving a bus pass subsidy from their employer or school—decreasing from 76% in 2009 to 59% in 2011. At the same time, respondents report the same level of subsidized or free parking as in previous years.	% Subsidize Transit **59%** % Free Parking **77%**	Changes to transit benefit programs as well as the economy appear to have caused employers and schools to choose not to subsidize transit while continuing to subsidize parking. Cost and availability of parking is a major incentive to ride transit. Metro should work with employers to provide more equal benefits. Metro should also work with the local jurisdictions to decrease the availability of free on-street parking.

Topic	Key Findings	Key Stats	Implications
Overall Rider Satisfac-tion	Rider satisfaction continues to be high, notably the percentage of riders who are "very satisfied." However, there has been a decrease in the percentage who are "somewhat satisfied" and a corresponding increase in the percentage that are "neutral / dissatisfied." This decrease has been greatest among Moderate Regular Riders.	Total % Satisfied **91%** % Very Satisfied **50%** % Somewhat Satisfied **41%** % Neutral / Dissatisfied **9%**	While Metro has achieved gains in the frequency with which Riders ride, somewhat lower levels of satisfaction among key customer segments—notably Moderate Regular Riders and those who ride Metro but do not use the system to get to work—may be inhibiting growth.
Key Elements of Service	Riders are at least somewhat satisfied with nearly all individual elements of service. Riders are most satisfied with: • The ORCA Card • Safe bus operation and daytime safety • Metro drivers • Customer information They are less satisfied with: • Safety after dark • Park-and-ride lots • Comfort while riding • Levels of service • Transferring • Stop announcements Satisfaction with individual elements of service has remained stable over the years with a few notable exceptions.	**% Total Satisfied** 2010 2011 Ease of Paying Fares **94% 92%** Safety in DT Transit Tunnel **81% 90%** How Drivers Handle Incidents on Buses **78% 84%** On-Time Performance **80% 75%** Availability of Parking at P&R **80% 71%**	Metro should focus its efforts for improvements on areas that are key drivers of overall customer satisfaction and advocacy, and where satisfaction is lower, as well as those areas which it can realistically control, including: • Frequency of service • On-time performance • Travel time • Overcrowding • Safety while riding after dark • Parking at park-and-ride lots • Wait time when transferring • Stop announcements

Topic	Key Findings	Key Stats	Implications
Non-Riders	More than two out of five (41%) Non-Riders have ridden Metro in the past. Most ride for non-commute trips.	Former Riders **41%** Never Ridden **31%**	The percentage of former riders remains high, providing significant potential for re-conversion to current ridership. However, it is likely that most trips will continue to be periodic, non-commute trips.
	More than half of all Non-Riders, Infrequent Riders, and Regular Riders who do not use the bus for most of their travel say that riding the bus is appealing. Young, males and those with previous experience riding represent the greatest opportunity for incremental ridership.	Total Appeal **51%**	Reaching out to Former Riders and encouraging them to take Metro at least occasionally represents the best opportunity for incremental ridership.
Non-Rider Barriers	Frequency and location of routes, coupled with a need for car use during the day/shift and perceived access to service remain the leading barriers to ridership.	Service Convenience **32%** Sig. Barrier Personal / Work Schedule **29%** Sig. Barrier Access to Service **28%** Sig. Barrier	Consistent, clear communication at the neighborhood as well as central levels regarding route maps and frequency, as well as hours covered, can overcome some misconceptions and inaccurate memories of service gaps.
Advo-cacy	While Metro's overall advocacy score is negative, this is largely driven by Non-Riders' perceptions. Metro's overall advocacy score among Riders is positive and exceeds that achieved by other transit systems using this measure	Overall **-19** Riders **28** Non-Riders **-38**	Advocacy / support for transit is important across all segments. Metro should continue to target its communications to Non-Riders emphasizing the benefits and encouraging their support even if they don't ride.

Topic	Key Findings	Key Stats	Implications
Environ-mental Impact	Over half of all riders would drive alone for their primary trip if transit was not available.	Drive Alone **52%** Purchase a Vehicle **27%**	Metro has a clear environmental impact by keeping cars of the road but also an economic impact by providing a less expensive way to travel and reducing the need for people to own multiple vehicles.
Informa-tion Sources	Traditional information sources—information at bus stops, transit centers, park-and-ride lots and printed timetables—continue to be an important source of information for Metro customers.	Primary Sources of Information @ Stops **76%** Printed timetables **75%** Metro Online **76%** Google's Trip Planner **74%** Regional Trip Planner **77%**	Opportunities to communicate with customers have increased significantly over the past several years. Metro should continue to provide information through traditional sources while taking advantage of new technologies.

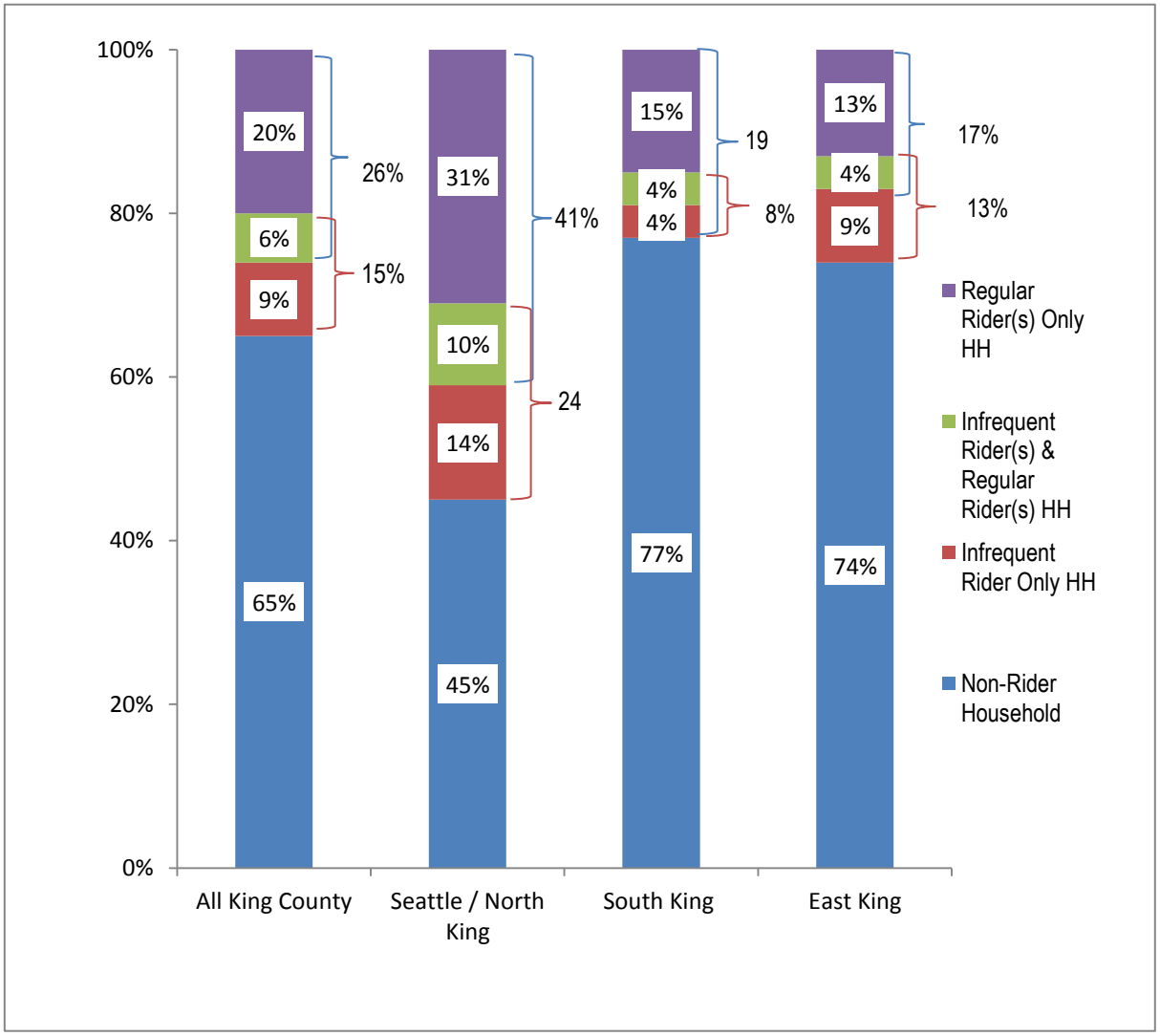
Market Share

The annual Rider / Non-Rider Survey provides a reliable measure of market share—the percent of King County households with one or more Regular Riders. This is done by asking all households contacted: (1) the number of individuals in their household 16 years of age and older, (2) the number of household members taking at least one one-way ride in the previous 30 days not including rides within the Ride Free Area (RFA), and (3) the number taking five or more one-way rides in the previous 30 days not including those totally within the RFA.

	What We Found	Key Stats	What It Means
All King County Households	The percentage of King County households with **Regular Riders** has been stable over the years ranging from 24% to 26%. The percentage of King County households with Infrequent Riders (1-4 trips in last 30 days) decreased significantly between 2010 and 2011 from 13% to 9%, with a nearly corresponding increase in Non-Rider households, 62% to 65%.	Regular Rider HHs **26%** Infrequent Rider HHs **9%** Non-Rider HHs **65%**	King County Metro Transit maintained share as economic conditions continue to improve in the region. However, the impact of underemployment has continued to limit the potential for ridership growth.
Seattle / North King County	The **Seattle / North King County** former planning area continues to represent Metro's core base of riders. More than half of all households in this region have one or more Regular Riders or Infrequent Riders.	Regular Rider HHs **41%** Infrequent Rider HHs **14%** Non-Rider HHs **45%**	Frequent and destination-specific service to major employment / cultural centers (DT Seattle and the University of Washington), coupled with expensive and limited parking, drives ridership in this area.
South King County	Share of Regular Rider households in **South King County** increased significantly in 2011—from 14% to 19%--with a corresponding decrease in Infrequent Rider households--9% to 4%.	Regular Rider HHs **19%** Infrequent Rider HHs **4%** Non-Rider HHs **77%**	The introduction of new services in this area has been successful in increasing the frequency with which customers ride.
East King County	Share of Regular Rider households in **East King County** increased over the past three years, from 14% to 17%. However, the share of Infrequent Rider households decreased in 2011 (from 13% to 9%) and the share of Non-Rider households increased slightly, from 72% to 74%.	Regular Rider HHs **17%** Infrequent Rider HHs **9%** Non-Rider HHs **74%**	While some growth in ridership was achieved by increased frequency of riding in some East King County households, other households appear to have stopped riding.

Figure 1: 2011 Market Share by Former Planning Subareas

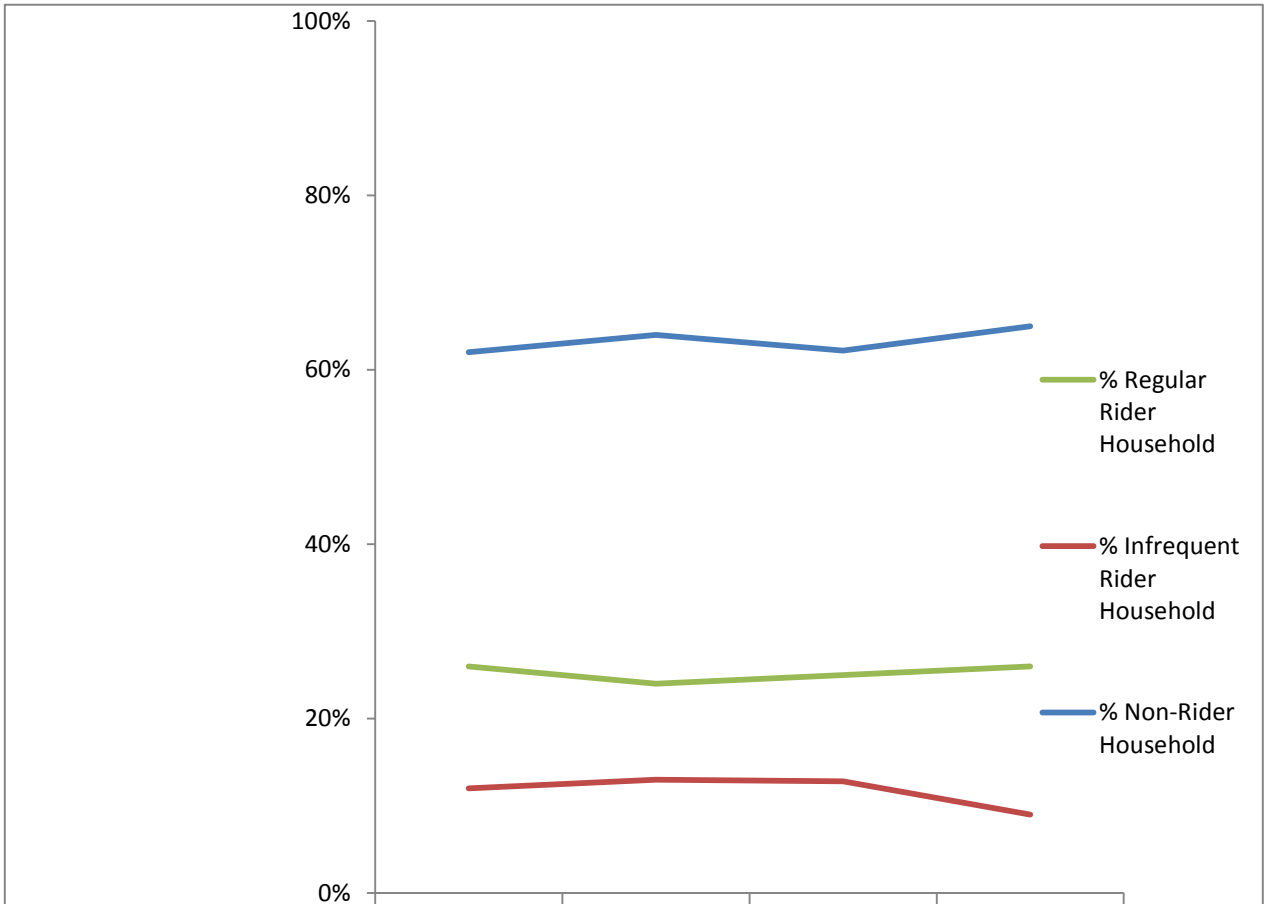
- More than one out of four King County households has at least one Regular Rider. Six percent (6%) have both Regular and Infrequent Riders in the household.
- Two out of five Seattle / North King County households are Regular Rider households. One out of ten has both Regular and Infrequent Riders in the household.
- One out of five South King County households is a Regular Rider household.
- East King County has the lowest percentage of Regular Rider households. More than twice as many East King County households are Infrequent Rider only households compared to South King County households.



Questions: *Including yourself, how many people in your household age 16 or over have taken at least 1 one-way ride on a Metro bus in the last 30 days?*
Including yourself, how many people in your household age 16 or over have taken at least 5 one-way rides on a Metro bus in the last 30 days?
Base*: All contacted households (n_{2011} = 12,736)*

Figure 2: King County Rider and Non-Rider Households, 2001 to 2011

- KC Metro's share of **Regular Rider** households has been relatively stable over the years—ranging from 24% to 26% or all King County households.
- The percentage of **Infrequent Rider** households decreased significantly in 2011—from 13% to 9%.
- There has been a nearly corresponding increase in **Non-Rider households**—from 62% to 65%.



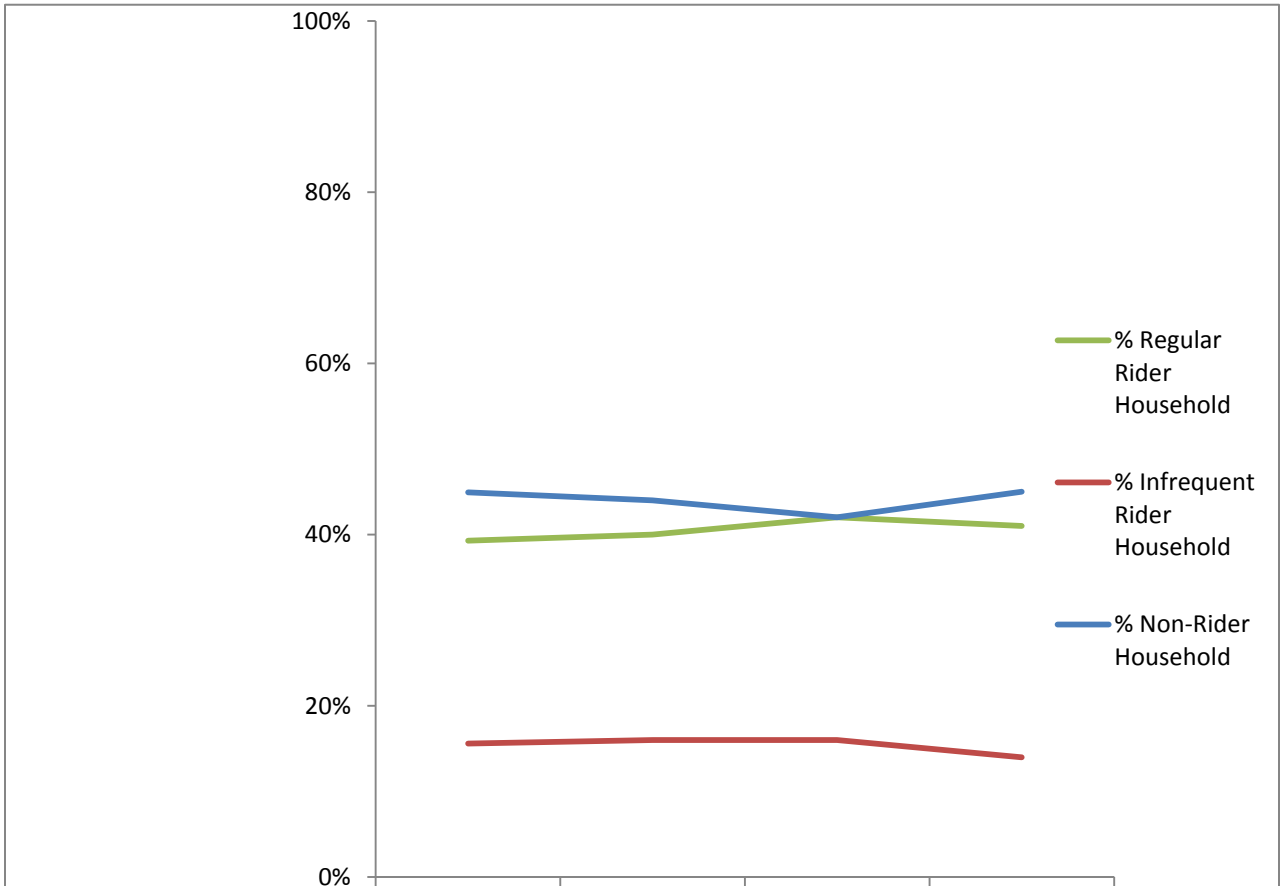
	2001 - 2008	2009	2010	2011
% Regular Rider Household	26%	24%	25%	26%
% Infrequent Rider Household	12%	13%	13%	9%
% Non-Rider Household	62%	64%	62%	65%

Questions: *Including yourself, how many people in your household age 16 or over have taken at least 1 one-way ride on a Metro bus in the last 30 days?*
Including yourself, how many people in your household age 16 or over have taken at least 5 one-way rides on a Metro bus in the last 30 days?

Base*: All contacted households (n_{2011} = 12,736)*

Figure 3: Rider and Non-Rider Households, Seattle / North King County

- Seattle/North King County continues as Metro's strongest market –over time the percentage of Regular Rider households there has ranged from 39% to 42%.
- This market is also a very stable market. There have been no significant changes in the percentages of Regular Rider, Infrequent Rider, and Non-Rider households over the years in this geographic area.



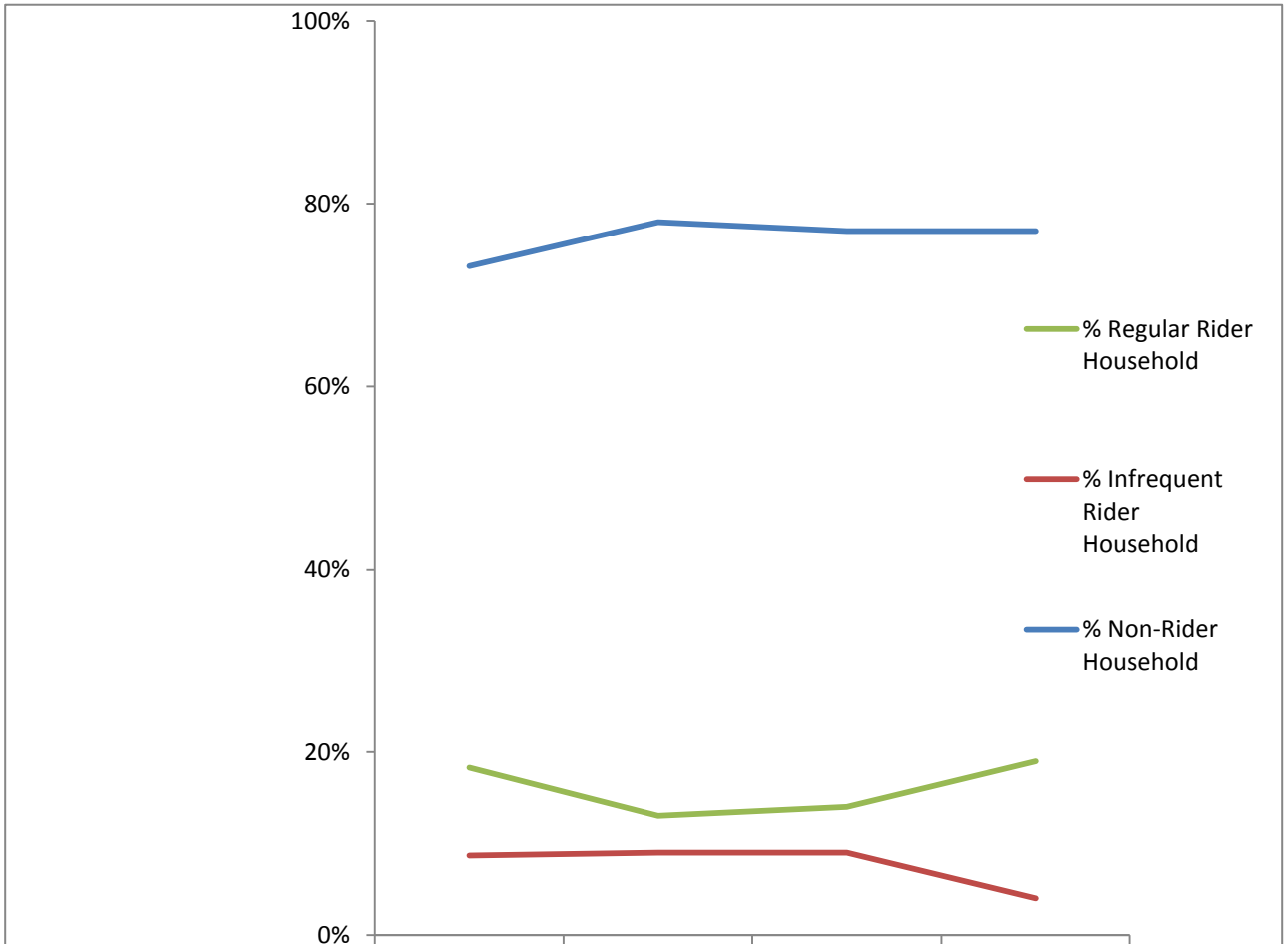
	2001 - 2008	2009	2010	2011
% Regular Rider Household	39%	40%	42%	41%
% Infrequent Rider Household	16%	16%	16%	14%
% Non-Rider Household	45%	44%	42%	45%

Questions: *Including yourself, how many people in your household age 16 or over have taken at least 1 one-way ride on a Metro bus in the last 30 days?*
Including yourself, how many people in your household age 16 or over have taken at least 5 one-way rides on a Metro bus in the last 30 days?

Base*: All contacted households (n_{2011} = 2,538)*

Figure 4: Rider and Non-Rider Households, South King County

- The share of Regular Rider households in South King County rebounded to 19% in 2011, consistent with previous levels seen in 2001-2008.
- At the same time, the percentage of Infrequent Rider households decreased significantly while the share of Non-Rider households has remained unchanged.



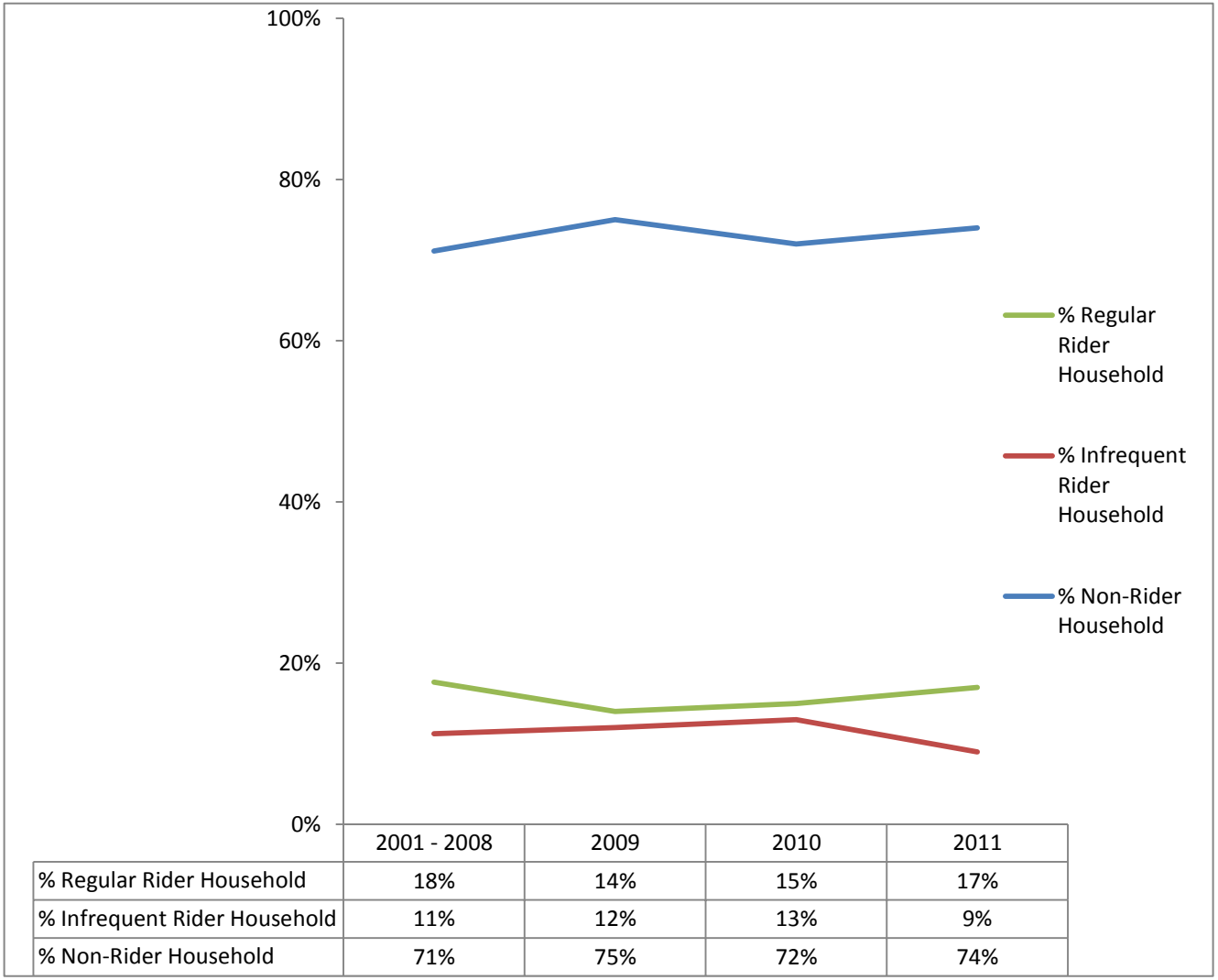
	2001 - 2008	2009	2010	2011
% Regular Rider Household	18%	13%	14%	19%
% Infrequent Rider Household	9%	9%	9%	4%
% Non-Rider Household	73%	78%	77%	77%

Questions: *Including yourself, how many people in your household age 16 or over have taken at least 1 one-way ride on a Metro bus in the last 30 days?*
Including yourself, how many people in your household age 16 or over have taken at least 5 one-way rides on a Metro bus in the last 30 days?

Base*: All contacted households (n_{2011} = 5,690)*

Figure 5: Rider and Non-Rider Households, East King County

- The share of Regular Rider households in East King County was 17% in 2011, and has been increasing slowly but steadily over the past several years.
- The percent of Non-Rider households increased somewhat in 2011 to 74%,
- The percent of Infrequent Rider households dropped significantly in 2011 to 9%.



	2001 - 2008	2009	2010	2011
% Regular Rider Household	18%	14%	15%	17%
% Infrequent Rider Household	11%	12%	13%	9%
% Non-Rider Household	71%	75%	72%	74%

Questions: *Including yourself, how many people in your household age 16 or over have taken at least 1 one-way ride on a Metro bus in the last 30 days?*
Including yourself, how many people in your household age 16 or over have taken at least 5 one-way rides on a Metro bus in the last 30 days?

Base*: All contacted households (n_{2011} = 4,508)*

Customer Characteristics

Riders are defined as individuals who take at least one one-way trip on Metro per month; a Regular Rider takes five or more trips. Analysis this year focused on further exploring and understanding the Regular Rider segment. Two groups were identified: Frequent Regular Riders (those taking 11 or more one-way trips / month) and Moderate Regular Riders (those taking between 5 and 10 one-way trips / month).

	What We Found	Key Stats	What It Means
All Riders	Compared to other US transit systems, Metro riders are more likely to be men than women.	Metro **53%** Male / **47%** Female	Lower ridership among women may reflect scheduling constraints (picking up children, errands, etc.) that limit their use of transit.
Regular Riders (5 + trips / month)	Regular Riders are more often young, single, moderate income but employed full-time. A higher percentage is carless, mostly driven by Frequent Riders in this category. Nonetheless, the vast majority (87%) are **choice** riders, since they have access to an automobile and a driver's license. Regular Riders are less affluent than Infrequent and Non-Riders.	Average Age **42.0** Employed **63%** Median Income **$56,738** Licensed Drivers **82%** Access to Vehicle **87%**	Younger people are often more susceptible to attitudinal and behavioral change and have a greater flexibility to use transit (i.e., are less likely to have children or other scheduling constraints). Stressing the value of mass transit should be an ongoing theme, both reinforcing existing Frequent Riders and increasing trip frequency for others. For example, the Google function that shows comparative costs of a bus vs. car commute can be further leveraged. Reinforcing Metro's advantages and optimizing operational efficiency to overcome perceived service gaps (from announcements to crowding to reliability) can affect non-commute trip frequency.
Frequent Regular Riders (11 + trips / month)	Frequent Regular Riders represent a distinct segment from Moderate Regular Riders and represent Metro's core riders—63% are employed full-time. Frequent Regular Riders are Metro's youngest segment (average age 41.8) and are more likely to be men (55%) than women (45%)	Average Age **41.8** Employed **78%** Median Income **$58,538** Licensed Drivers **82%** Access to Vehicle **87%**	Leveraging commuters' experiences into messaging for less experienced Riders and using them as advocates, via Metro's website, as well as print and outdoor ads should be considered. Men are more likely to be Frequent Regular Riders as they are more likely to be employed than women.

	What We Found	Key Stats	What It Means
Moderate Regular Riders (5-10 trips / month)	Moderate Regular Riders are a distinct segment from both Frequent Regular and Infrequent Riders. While, two out of five are 34 and younger, 11% are 65 plus. One out of seven (15%) are currently unemployed, 11% are students, and 10% are self-employed.	Average Age **42.3** Employed **63%** Median Income **$52,365** Licensed Drivers **83%** Access to Vehicle **86%**	Though Moderate Riders do less commuting because they are less often employed, they still desire mobility around the county and should be messaged to accordingly. These are prime conversion targets as the economy continues to improve and those unemployed re-enter the workforce. Increased ridership is also possible by increasing the frequency with which students use transit for non-commute trips.
Infrequent Riders (1-4 trips)	Infrequent Riders are more likely to live in two-vehicle households thus having more transportation options than other Metro riders. Many (17%) are retired and not in the habit of using public transportation on a regular basis.	Average Age **44.1** Employed **64%** Median Income **$73,789** Licensed Drivers **89%** Access to Vehicle **95%**	Since many in this group use public transit as a "last resort," travel to events, etc. they may not be aware of how often routes they could take run, and where they go. Neighborhood-level initiatives toward these socially-connected riders may be productive.
Non-Riders	As expected, Non-Riders are older, more likely in a high income segment, more often live with a spouse in a two-vehicle household where both drive.	Average Age **47.3** Employed **65%** Median Income **$70,028** Licensed Drivers **96%** Access to Vehicle **99%**	The presence of children or other family members may introduce barriers to using transit. To the extent that car travel is their chosen lifestyle, Non-Riders are the most difficult segment to convert. However, within this segment are less wealthy / mobile residents, to whom communication regarding the cost-effectiveness of Metro trips should be directed. Moreover, emphasizing that use of transit is not an all or nothing commitment can encourage this segment to use transit for specific types of trips—e.g., to downtown Seattle or special events.

Figure 6: Demographic Characteristics of Metro Riders and Non-Riders

- Regular Riders are somewhat more likely than Infrequent Riders and Non-Riders to be male (54%) than female (46%), notably among Metro's most frequent riders. In contrast, most (55%) US transit riders are women.

	All Riders	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders	Non-Riders
Male	53%	54%	55%	52%	51%	49%
Female	47%	46%	45%	48%	49%	51%

- Regular Riders are younger than Non-Riders and, to a lesser extent, Infrequent Riders. The 25 to 34 year old age group represents a significant market for KC Metro.
- Infrequent Riders are more diverse. While more than one-third (35%) are less than 35, a similar number (32%) are 55 and older.
- Non-Riders are the oldest target segment—more than half (54%) are 45 and older.

	All Riders	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders	Non-Riders
16 - 17	4%	4%	3%	5%	**4%**	2%
18 – 24	10%	10%	10%	9%	**10%**	7%
25 – 34	22%	23%	**23%**	**23%**	**21%**	17%
35 – 44	19%	20%	22%	18%	16%	21%
45 – 54	18%	19%	18%	19%	16%	20%
55 – 64	17%	17%	17%	14%	17%	17%
65 plus	11%	8%	6%	11%	**15%**	**17%**
Mean	42.8	42.0	41.8	42.3	44.1	**47.3**

- Three out of four Frequent Regular Riders are employed, making this segment Metro's core customer segment.
- One out of seven Moderate Regular Riders is currently unemployed. In addition, many are self-employed or students.

	All Riders	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders	Non-Riders
Employed FT	51%	56%	**63%**	42%	44%	46%
Employed PT	11%	12%	12%	11%	11%	9%
Self-Employed	6%	5%	3%	**10%**	9%	10%
Student	8%	8%	7%	**11%**	9%	3%
Homemaker	3%	2%	2%	2%	5%	7%
Retired	11%	8%	7%	10%	**17%**	**18%**
Unemployed	8%	9%	6%	**15%**	6%	6%

- Regular Riders are less affluent than Infrequent Riders and Non-Riders. Moreover, they are less affluent than the general population in King County.

NOTE: *Riders' household incomes are significantly lower in 2011 compared to previous years. While some of this may be due to general declines in real income across all segments, among riders this is also due to changes in sampling to ensure representation of low-income households roughly in proportion to their incidence in the general population. Since less affluent persons are more likely to use public transportation, the impact of this sampling is greater among riders.*

	All Riders	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders	Non-Riders
Less than $35K	27%	28%	25%	**36%**	24%	19%
$35K—<$55K	17%	20%	**22%**	**22%**	12%	19%
$55K—<$75K	15%	15%	15%	15%	15%	16%
$75K—<$100K	15%	14%	13%	13%	17%	17%
$100K—<$150K	15%	13%	14%	14%	18%	15%
$150K or more	11%	10%	11%	11%	14%	14%
Median	$63,009	$56,738	$58,538	$52,365	$73,789	$70,028

- Both Regular and Infrequent Riders are more likely than Non-Riders to live alone.

	All Riders	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders	Non-Riders
Single-Person Household	25%	25%	**25%**	**24%**	**26%**	21%
Multi-Person Household	75%	75%	75%	76%	74%	**79%**

- While slightly more ethnically diverse, Metro Riders are not significantly different from Non-Riders and generally mirror the general population of King County.

	All Riders	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders	Non-Riders
Caucasian	77%	76%	74%	80%	80%	83%
Asian	13%	12%	13%	10%	14%	8%
African-American	6%	6%	7%	6%	5%	4%
Other	5%	11%	12%	10%	7%	10%
% Hispanic	7%	9%	10%	7%	3%	8%

- As in the past, more than four out of five Regular Riders have a driver's license and access to a vehicle.

	All Riders	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders	Non-Riders
% w/ Driver's License	85%	82%	82%	83%	**89%**	**96%**
% w/ Vehicle	90%	87%	87%	86%	**95%**	**99%**
# of Vehicles	1.6	1.5	1.5	1.5	**1.8**	**2.0**

Figure 7: Demographic Characteristics of Metro Riders (Income Segments)

- Less affluent riders are more likely to be women than men.

	All Riders	Less Affluent <$35K	More Affluent >$35
Male	53%	45%	**56%**
Female	47%	**55%**	44%

- Less affluent riders are younger, with a significant percentage between the ages of 18 and 24.

	All Riders	Less Affluent <$35K	More Affluent >$35
16 - 17	4%	3%	3%
18 – 24	10%	**20%**	6%
25 – 34	22%	22%	24%
35 – 44	19%	15%	**21%**
45 – 54	18%	14%	**19%**
55 – 64	17%	15%	16%
65 plus	11%	11%	10%
Mean	42.8	40.5	**43.5**

- Less affluent riders are more likely to be employed part-time or to be students, retired, or currently unemployed.

	All Riders	Less Affluent <$35K	More Affluent >$35
Employed FT	51%	23%	**64%**
Employed PT	11%	**20%**	8%
Self-Employed	6%	6%	7%
Student	8%	**14%**	5%
Homemaker	3%	4%	3%
Retired	11%	**15%**	9%
Unemployed	8%	**18%**	5%

- Less affluent riders are more likely to live alone..

	All Riders	Less Affluent <$35K	More Affluent >$35
Single-Person Household	25%	**41%**	20%
Multi-Person Household	75%	59%	**80%**

- Less affluent riders are more diverse.

	All Riders	Less Affluent <$35K	More Affluent >$35
Caucasian	77%	60%	**84%**
Asian	13%	16%	11%
African-American	6%	**14%**	3%
Other	5%	7%	4%
% Hispanic	7%	**14%**	5%

- Less affluent riders are less likely to have a driver's license or a vehicle available for their use.

	All Riders	Less Affluent <$35K	More Affluent >$35
% w/ Driver's License	85%	62%	**93%**
% w/ Vehicle	90%	70%	**94%**
# of Vehicles	1.6	1.0	1.7

Transit Use

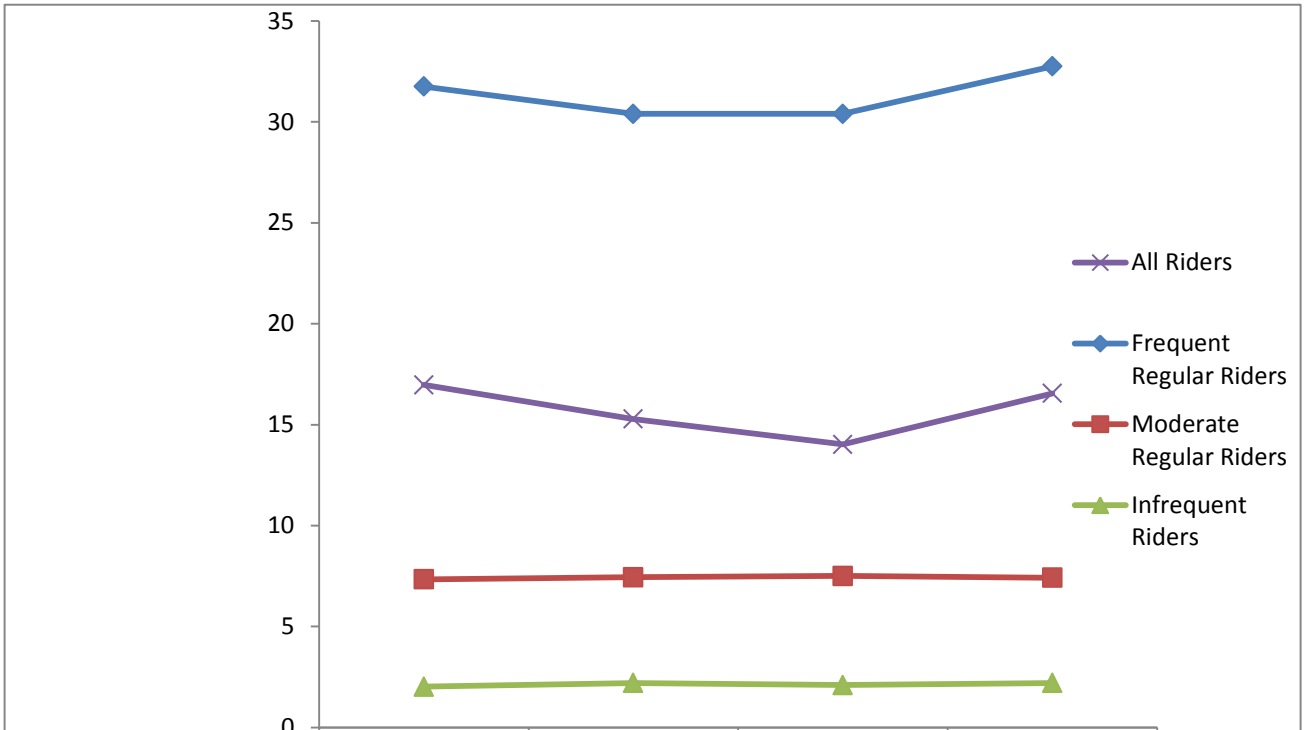
This research provides a comprehensive picture of how customers use Metro. As the demographic analysis illustrates, there are clear differences between Frequent and Moderate Regular Riders. Therefore, analysis in this section examines differences in transit use between the three segments: Frequent Moderate Riders (10 plus rides / month), Moderate Regular Riders (6 to 10 rides / month), and Infrequent Riders (1 to 4 ride / month).

	What We Found	Key Stats	What It Means
Frequency of Riding	In 2011 frequency of riding increased significantly among both Regular and Infrequent Riders, reversing the trend from previous years. In parallel, the percentage of Frequent Regular Riders and Moderate Regular Riders has increased since 2010.	Average # One-Way Trips 2011 **16.6** Average # One-Way Trips 2010 **14.0**	King County's recent increases in ridership appear to be primarily attributable to an increase in the frequency with which existing customers ride, rather than acquisition of new customers.
Reliance on Transit	**Reliance on Transit**: Metro customers are increasingly reliant on Metro for all or most of their transportation needs. More than one out of three (36%) riders rely on Metro for most or all of their transportation, up from 27% in 2010. As noted in the previous section, the vast majority (90%) of these riders have access to an automobile and a driver's license, so they ride Metro as a matter of choice rather than necessity.	% All / Most Trips: All Riders: **36%** Frequent RR: **58%** Moderate RR: **29%** Infrequent Rider: **13%**	In part, a larger "rely on Metro" group reflects a revised sampling plan this year to ensure greater representation of low-income households. However, it may also suggest that some riders have gradually adopted a car-free lifestyle as community walkability increases and Metro service meets their travel needs. This increased reliance on Metro even among those who have other options clearly demonstrates advantages of taking transit, including avoiding rising gas prices, cost of parking, insurance premiums and traffic congestion. Each of these can be addressed in communication. In addition, this finding suggests that Metro's service is better aligned with customer needs.

	What We Found	Key Stats	What It Means
Trip Purpose	After years of a slow but steady decline in the percentage of work trips, this trend appears to have reversed. Current percentage of work trips has returned to pre-2009 levels. At the same time, nearly half use Metro primarily for non-commute trips.	Commute Trips **52%** Non-Commute Trips **48%**	Though the majority of Metro trips are work commutes, elective trips can play a large role in increasing trip frequency and should be a strategic focus.
Travel Times	Riders are increasingly using Metro throughout the day, into the evening, and on weekends. While reported ridership has increased in all time periods, the increase is greatest for early morning, early evening, and weeknight travel times.	Peak & Off-Peak **70%** Peak Only **15%** Off-Peak Only **15%**	This reflects an increase in "elective" non-commute trips as riders increasingly choose to use transit and possibly work longer hours as employers' strive to keep productivity high with fewer employees.
Length of Time Riding	There was a significant decrease in the percentage of new riders and a corresponding increase in the percentage of long-term riders (those riding five or more years).	New Riders 14% Experienced Riders 24% Long-Term Riders 62%	This change is most likely due to greater representation of low-income households who are also more reliant on transit.

Figure 8: Trends in Frequency of Riding (Average Number of One-Way Trips)

- After decreasing steadily through 2010, the average number of monthly trips increased significantly in 2011, notably among Frequent Regular Riders.



	2001 - 2008	2009	2010	2011
All Riders	17.0	15.3	14.0	16.6
Frequent Regular Riders	31.8	30.4	30.4	32.8
Moderate Regular Riders	7.3	7.4	7.5	7.4
Infrequent Riders	2.0	2.2	2.1	2.2

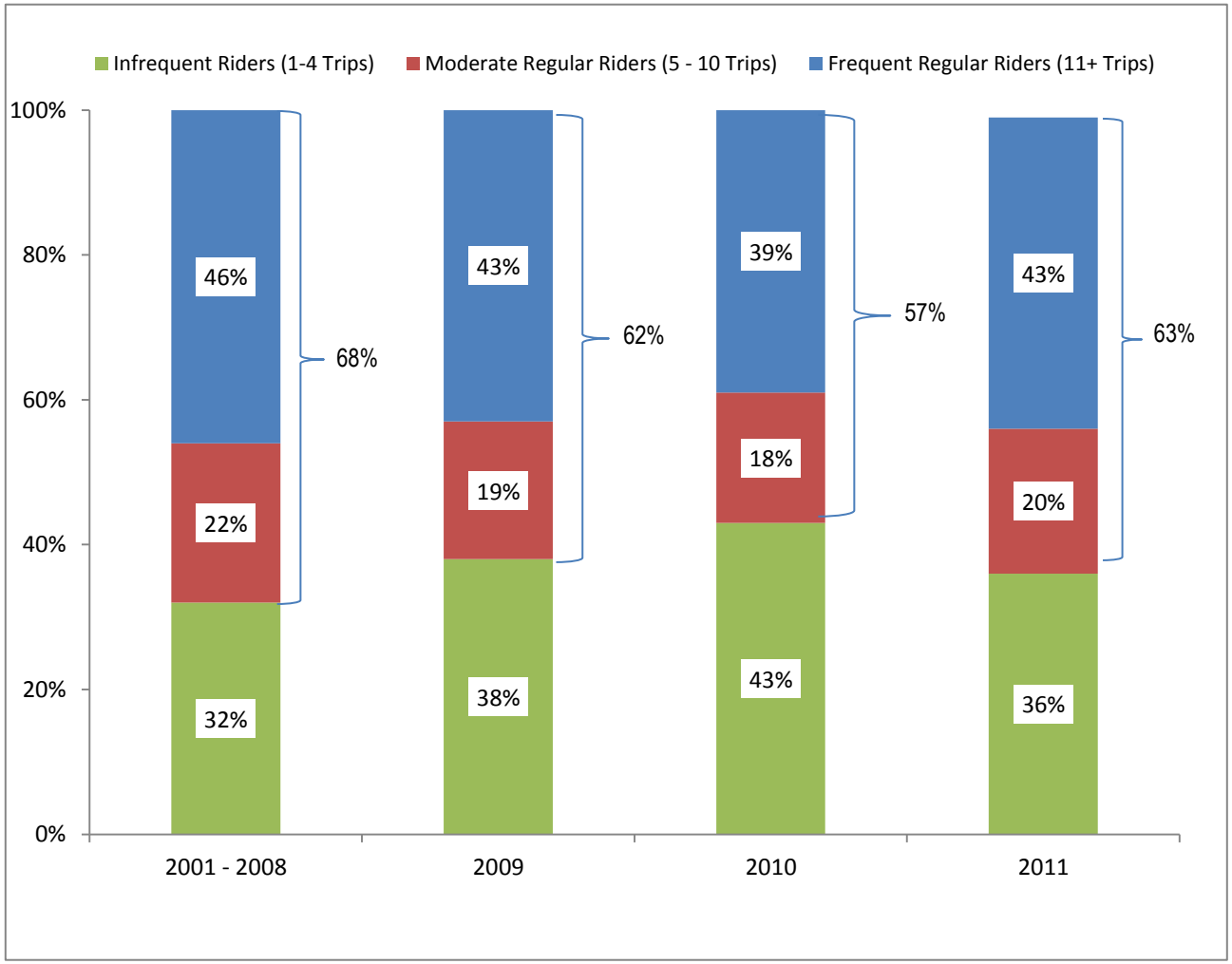
Question SCR4: *Thinking about the past 30 days, how many one-way rides have you personally taken on a Metro bus not counting rides entirely within the Downtown Seattle Free Ride Area?*

Key: *Frequent Regular Riders (11 plus one-way trips); Moderate Regular Riders (5 to 10 one-way trips; Infrequent Riders (1 to 4 one-way trips)*

Base*: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 9: Trends in Rider Segments (Based on Frequency of Riding)

- The percentage of riders who are Regular Riders in 2011 returned to the level seen in 2009 and was significantly greater than in 2010.
- This is consistent with the decrease in the percentage of households with Infrequent Riders and more frequent riding by Regular Riders.
- Thus, all segments may have averaged an increase of one to two transit trips over previous years, despite the insignificant drop in the average number of trips taken by Moderate Regular Riders. That is, Infrequent Riders increased with some becoming Moderate Regular Riders. Therefore, while Moderate Regular Riders ride less often there are more Moderate Regular Riders.



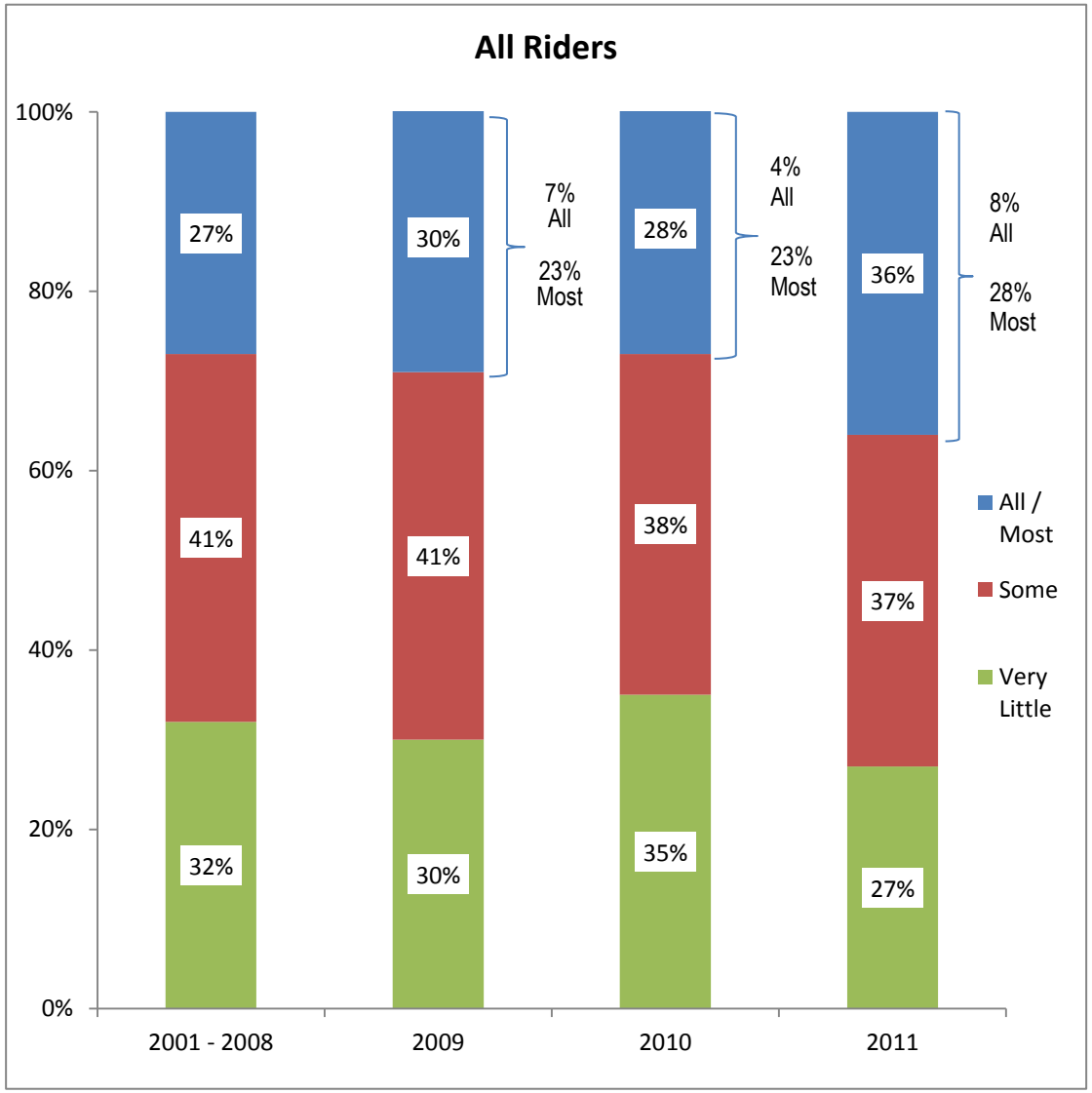
Question SCR4: *Thinking about the past 30 days, how many one-way rides have you personally taken on a Metro bus not counting rides entirely within the Downtown Seattle Free Ride Area?*

Base*: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 10: Trends in Reliance on Metro for Transportation

- The percentage of riders that report using Metro for all or most of their transportation needs has increased significantly from previous years, to 36% in 2011.
    - A greater percentage of this particular subgroup lacks a personal vehicle than in previous years, from 14% in 2010 to 27% in 2011.
- Nearly three out of five Frequent Regular Riders rely on Metro for all (13%) or most (45%) of their transportation needs.

	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
All / Most	**49%**	**58%**	29%	13%
Some	45%	38%	**58%**	24%
Very Little	7%	3%	14%	**63%**



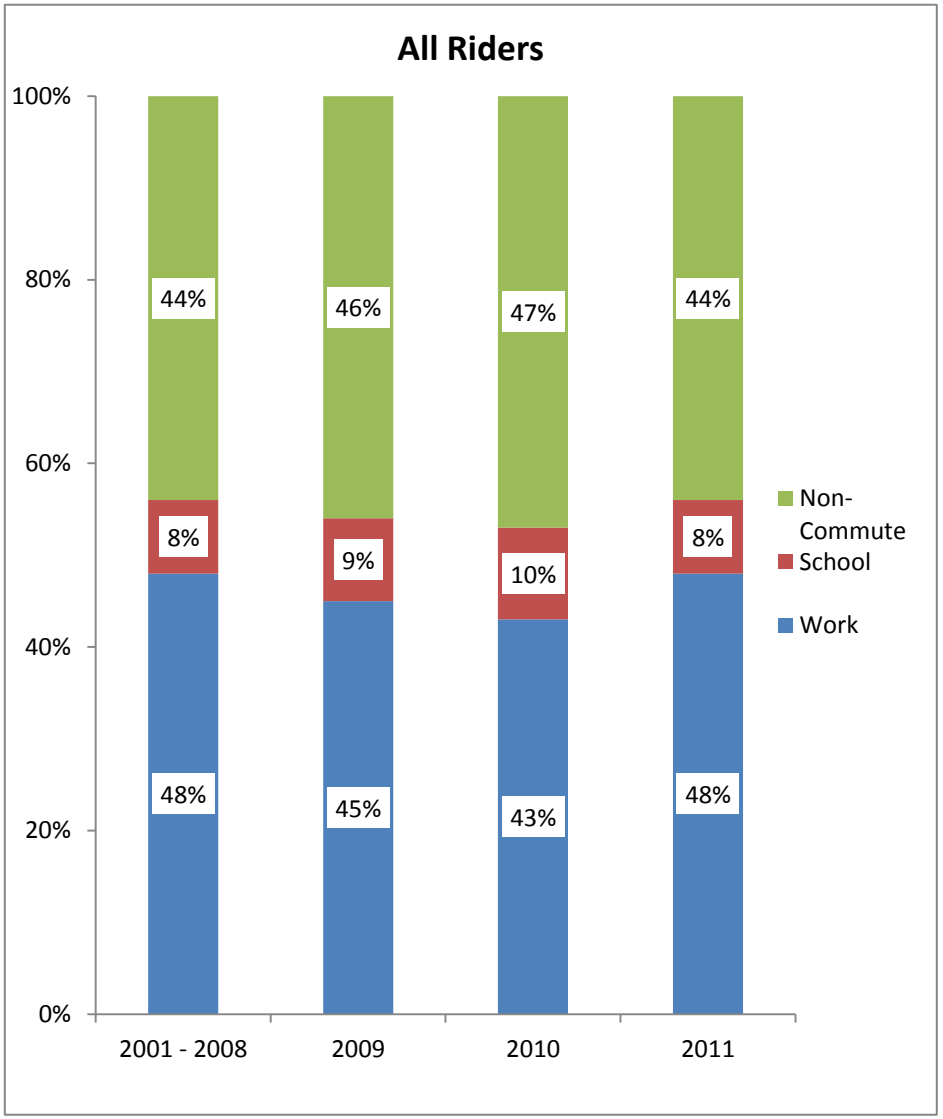
Question MET4 : *To what extent do you use the bus system to get around?*

Base*: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 11: Trends in Trip Purpose

- After years of a slow but steady decline in the percentage of work trips, this trend appears to have reversed. Current percentage of work trips has returned to pre-2009 levels.
- Nearly three out of four Frequent Regular Riders use Metro primarily to commute to work; an additional 9% commute to school.
- Seven out of ten Infrequent Riders use Metro for non-commute trips, again suggesting opportunities to increase trip frequency.

	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
Work	**61%**	**72%**	38%	24%
School	10%	9%	11%	6%
Non-Commute	29%	19%	**51%**	**70%**



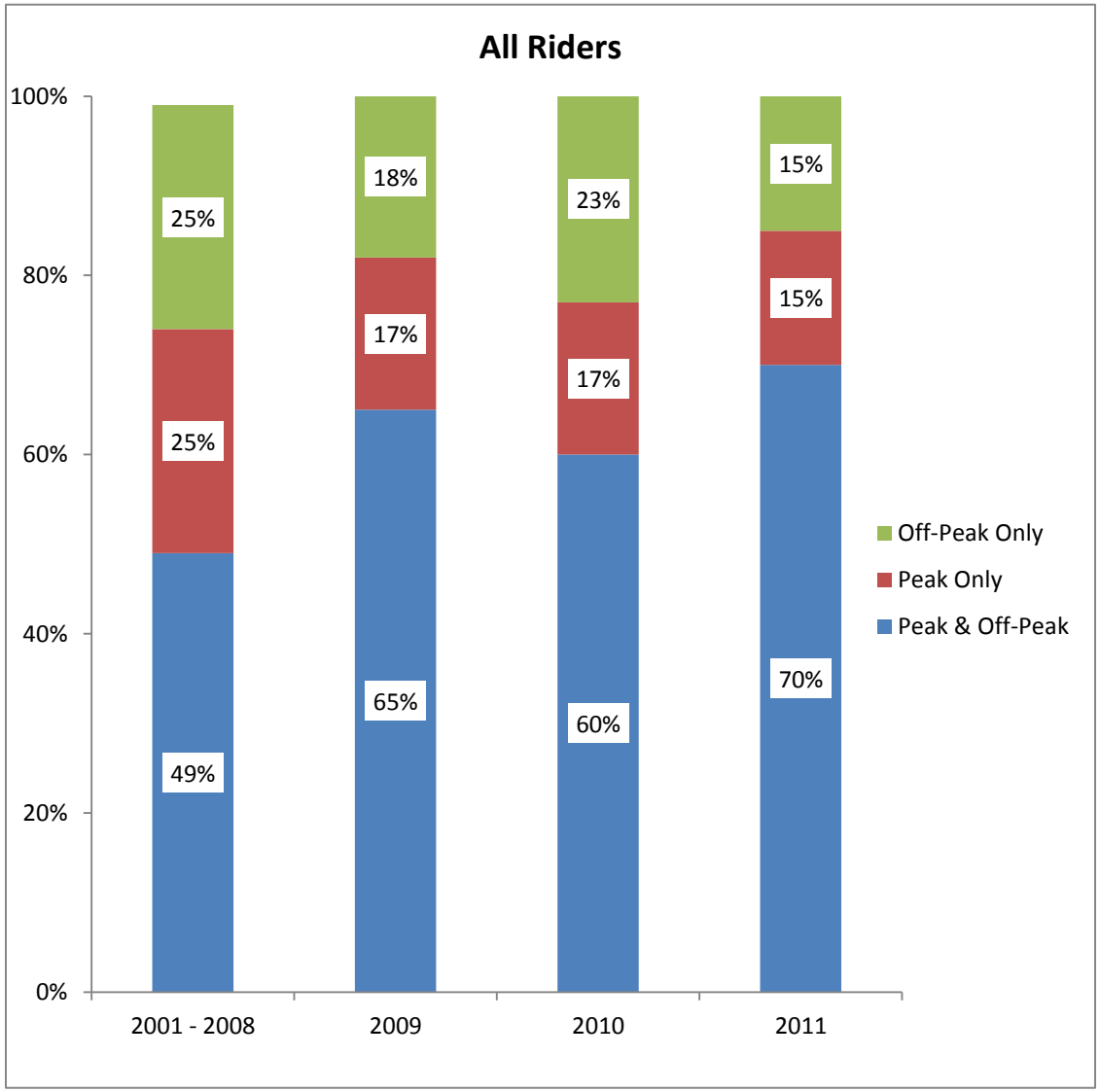
***Question MET5**: When you ride the bus, what is the primary purpose of the trip you take most often?*

***Base**: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 12: Trends in Travel Hours

- Seven out of ten riders use Metro during both peak and off-peak hours, the highest percentage tracked over the years.
- Use during all times of the day has increased. The greatest increase is in the percentage riding during early morning, early evening, and on weeknights.

	2001 – 2008	2009	2010	2011
Early Morning (before 6:00 a.m.)	2%	7%	3%	9%
Morning Peak (6 – 9 a.m.)	54%	54%	51%	59%
Midday (9 a.m. – 3 p.m.)	44%	48%	46%	51%
Evening Peak (3 – 6 p.m.)	63%	71%	69%	74%
Early Evening (6 – 7 p.m.)	26%	36%	35%	42%
Weeknights	20%	26%	28%	34%
Weekends	46%	55%	56%	62%



Question MET6: *When do you typically ride Metro?*

Base*: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 13: Length of Time Riding

2011 saw a significant decrease in the percentage of new riders (those starting to ride after September 2010) and a corresponding increase in the percentage of long-term riders (those riding five or more years).

	2001 – 2008	2009	2010	2011
	% New Riders			
Seattle / N. King	17%	15%	18%	11%
South King	22%	24%	24%	22%
East King	27%	26%	26%	16%

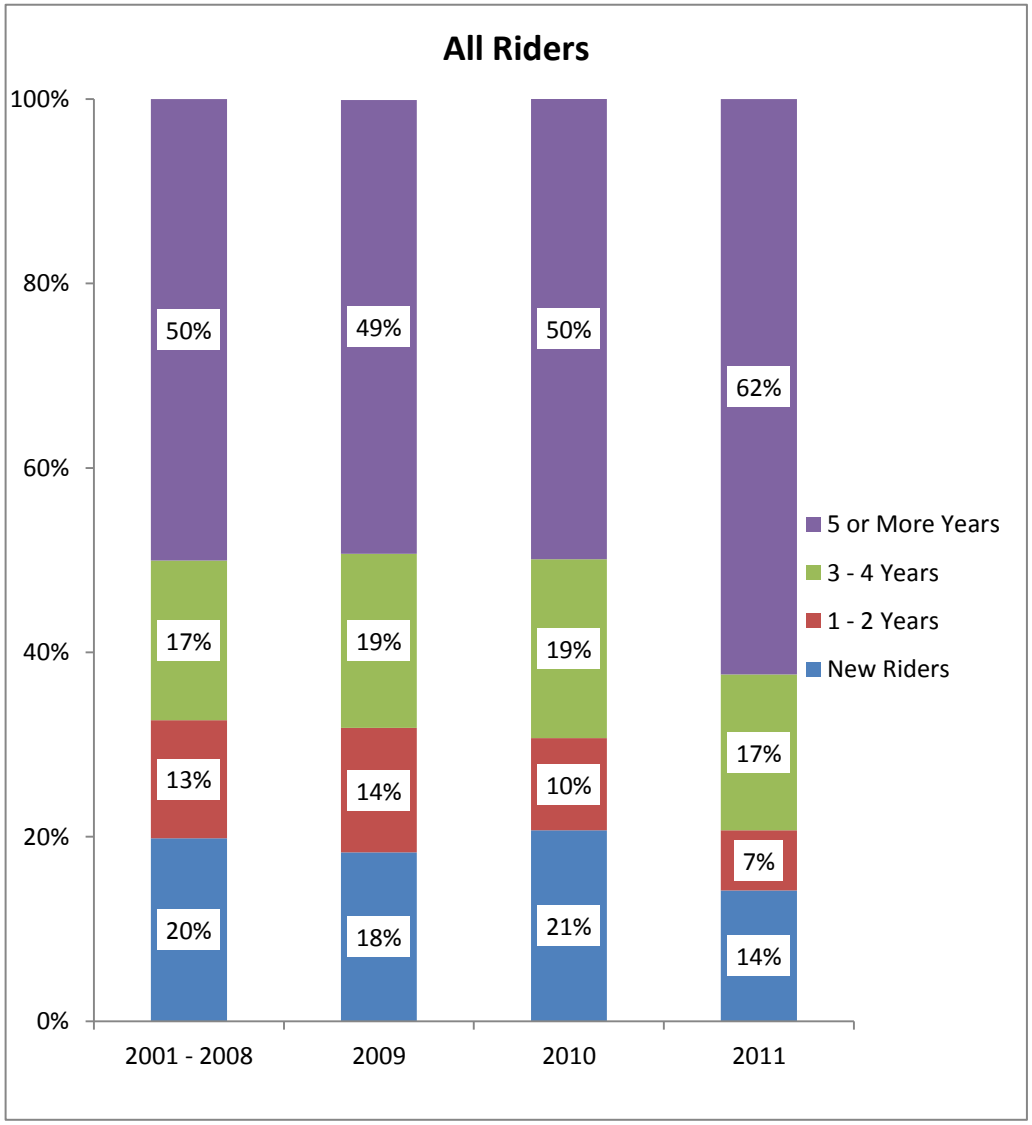
New ridership continues to come from residents of South King County,

Less Affluent (<$35K)

	All Riders	Seattle / N. King	South King	East King
New Riders	16%	14%	**20%**	14%
Experienced Riders	84%	86%	80%	86%

More Affluent (>$35K)

	All Riders	Seattle / N. King	South King	East King
New Riders	13%	9%	**25%**	16%
Experienced Riders	87%	91%	75%	84%



Transferring

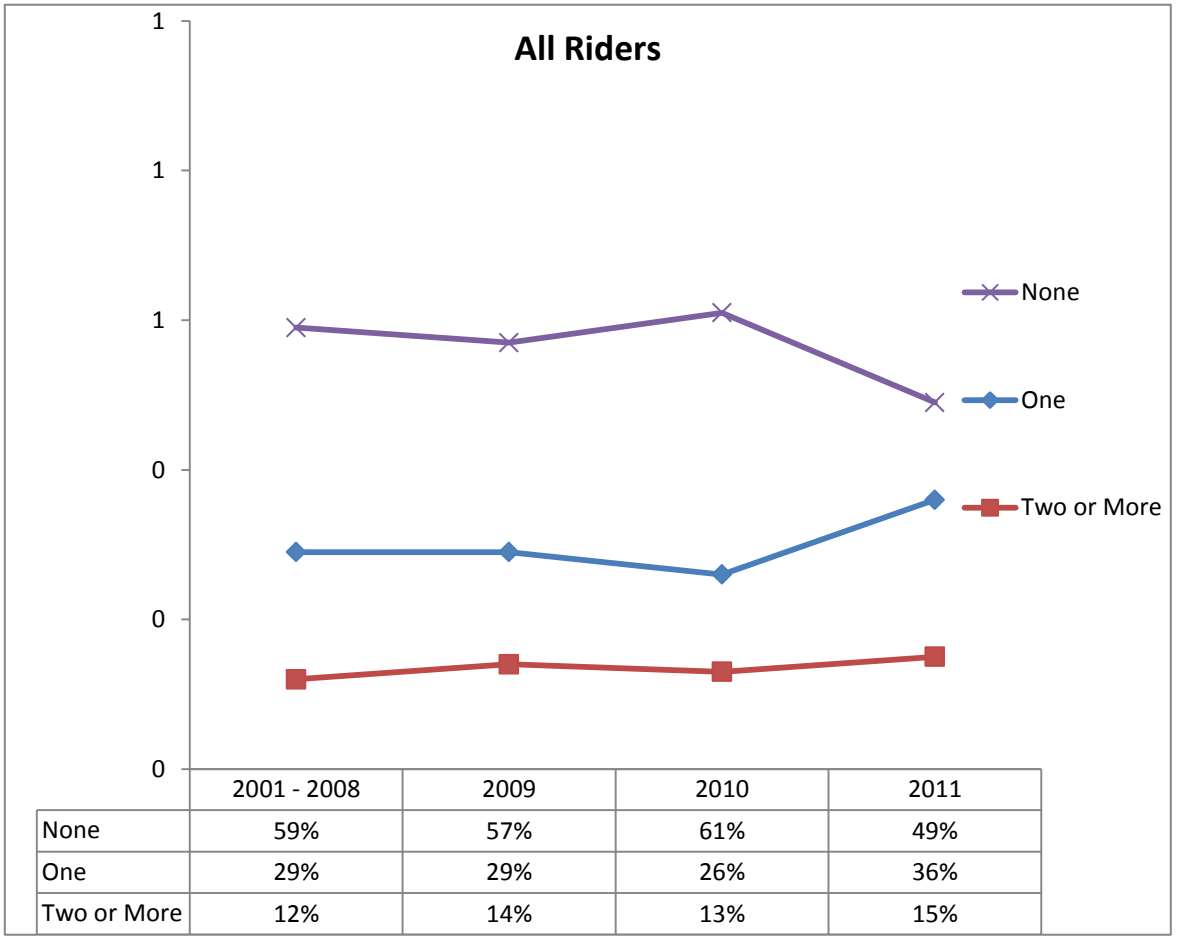
King County has a complex, multi-modal transportation system. Questions regarding transfer rates and wait times when transferring have been asked for many years. In 2011, a new question was added to capture the extent to which Metro riders transfer within Metro or use other systems.

	What We Found	Key Stats	What It Means
Transfer Rates / Wait Time When Transferring	The extent to which riders transfer as part of their trips increased significantly in 2011—from 39% to 51%. Two out of three (67%) South King County riders transfer, up significantly from 2009 (48%) and 2010 (51%). For those who transfer, waiting also increased. Currently, riders who transfer wait an average of 14.2 minutes between buses—up from 13.2 minutes in 2009 and 2010. South King County riders also have the longest waits between buses—on average 16.4 minutes, up from 14.5 minutes in 2010.	% who Transfer **51%** Average Wait Time **14.2** mins.	In a less stable job market, riders with commutes requiring transfers are less likely to gain new employment with a more desirable commute. A greater number of transfers and longer wait times could contribute to decreased satisfaction not only with those elements of service directly related to transferring but also to related elements of service such as travel time by bus.
Satisfaction with Transferring	Despite the greater number of riders who transfer and longer wait times, satisfaction with transferring among South King County riders is not negatively affected. Wait times greater than 10 minutes have a significant impact on customer satisfaction.	Number of Transfers **81%** Total Satisfied Wait Time **73%** Total Satisfied	Metro should continue to support riders with rider tools to minimize transfers, clear /accurate messaging regarding the next bus at applicable stops, and partnering with other transit agencies to ensure that riders are able to easily see where inter-system connections could reduce their total commute time.

Figure 14: Trends in Transfer Rates

- After remaining relatively stable over the years, the extent to which riders' trips require a transfer increased significantly in 2011. Notably, there has been a significant increase in the percentage of trips requiring one transfer.
- South King County riders are more likely than those in Seattle / North King and East King County to take a trip that requires a transfer—more than one out of four take trips that require two or more transfers.

	Seattle / N. King	South King	East King
None	**52%**	33%	**59%**
One	37%	**39%**	30%
Two +	11%	**28%**	11%



	2001 - 2008	2009	2010	2011
None	59%	57%	61%	49%
One	29%	29%	26%	36%
Two or More	12%	14%	13%	15%

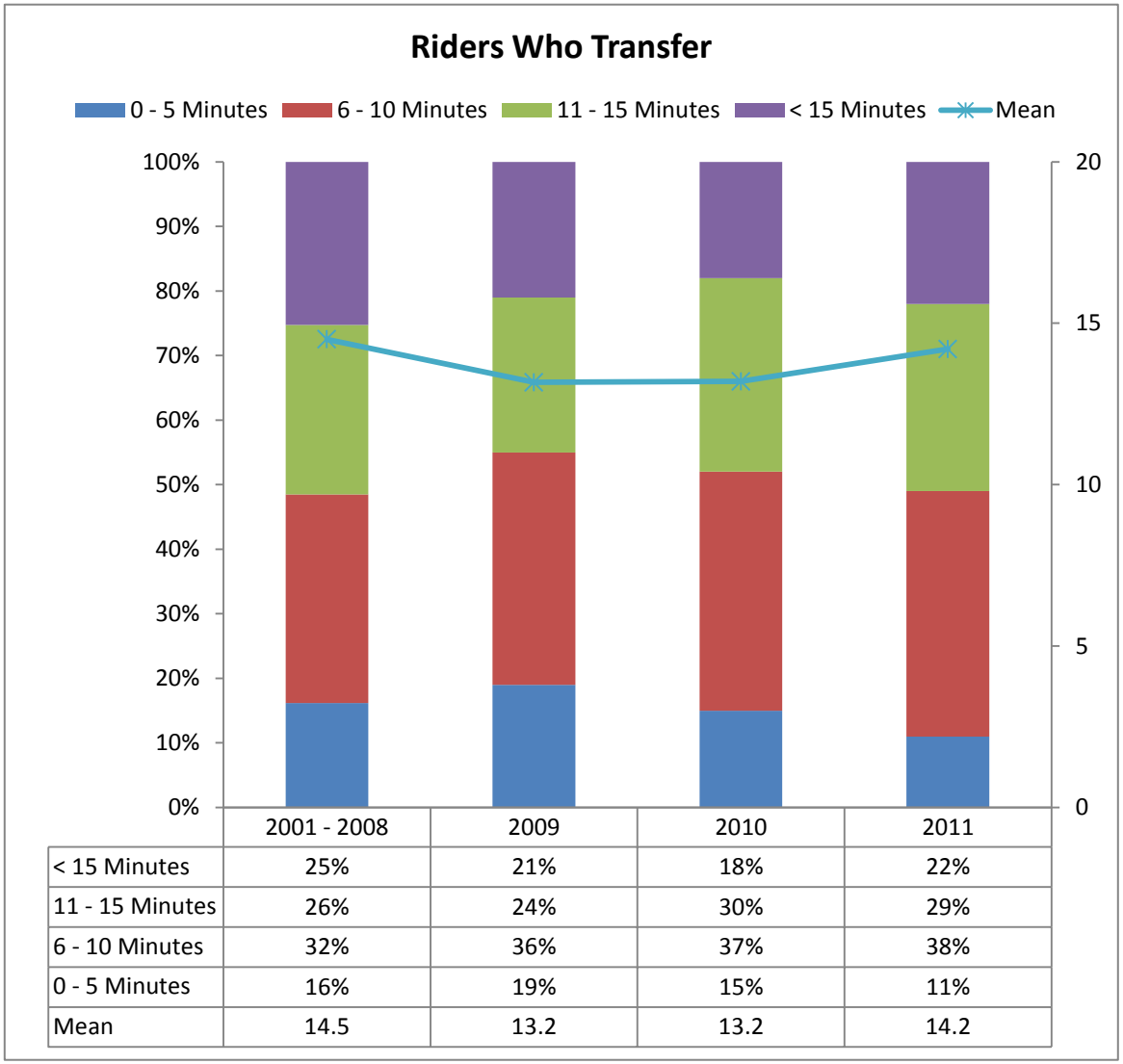
Question MET7: *How many transfers do you usually make when you use the bus? *Note response code for varies was added in 2008. For comparability purposes, this data is not included.*

Base*: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 15: Trends in Wait Times When Transferring

- Wait times when transferring increased in 2011, due to an increase in the percentage waiting more than 15 minutes.
- South King County riders who transfer have significantly longer wait times than do those living in East and Seattle / North King County. Seattle / North King County riders who transfer have the shortest wait times between buses.

	Seattle / N. King	South King	East King
0 – 5 Minutes	11%	10%	13%
6 – 10 Minutes	**42%**	32%	32%
11 – 15 Minutes	31%	21%	**36%**
> 15 Minutes	16%	**37%**	18%
Mean	13.0	**16.4**	14.5



	2001 - 2008	2009	2010	2011
< 15 Minutes	25%	21%	18%	22%
11 - 15 Minutes	26%	24%	30%	29%
6 - 10 Minutes	32%	36%	37%	38%
0 - 5 Minutes	16%	19%	15%	11%
Mean	14.5	13.2	13.2	14.2

Question MET7A: *How many minutes do you usually wait for a bus when you transfer?*
Base: *Riders who make one or more transfers (n_{2011} = 724)*

Figure 16: Satisfaction with Number of Transfers and Wait Time When Transferring

The majority of those who transfer are somewhat satisfied with the number of transfers needed and, to a lesser extent, the wait times when transferring.

- Despite the higher percentage of riders in South King County whose trips require a transfer and their longer wait times, satisfaction is not negatively affected. In fact, South King County riders are more satisfied with the number of transfers required, possibly reflecting lower expectations given their location.

As would be expected, satisfaction decreases as the number of transfers or wait time increases.

- Wait times greater than 10 minutes have a significant impact on customer satisfaction.

	Number of Transfers	
	1 Transfers	2 or More Transfers
Total % Satisfied	81%	79%
Very Satisfied	**41%**	33%
Somewhat Satisfied	40%	**46%**
Neutral / Dissatisfied	19%	21%

	Wait Time When Transferring			
	0-5 Mins.	6-10 Mins.	11-15 Mins.	> 15 Mins.
Total % Satisfied	**95%**	82%	67%	54%
Very Satisfied	**49%**	28%	19%	12%
Somewhat Satisfied	46%	54%	48%	42%
Neutral / Dissatisfied	5%	18%	**33%**	**46%**

	All Riders Who Transfer	Seattle / North King	South King	East King
	Number of Transfers			
Total % Satisfied	81%	77%	**89%**	80%
Very Satisfied	39%	39%	43%	30%
Somewhat Satisfied	42%	38%	46%	50%
Neutral / Dissatisfied	19%	23%	11%	20%
	Wait Time When Transferring			
Total % Satisfied	73%	72%	71%	77%
Very Satisfied	24%	22%	27%	25%
Somewhat Satisfied	49%	50%	44%	52%
Neutral / Dissatisfied	27%	28%	29%	23%

Question SATK: *Please tell me whether you are satisfied or dissatisfied with the following aspect—The number of transfers you have to make to get where you are going*
Question SATL: *Please tell me whether you are satisfied or dissatisfied with the following aspect—The wait time when you transfer*
Base: *Riders who make one or more transfers (n_{2011} = 724)*

Figure 17: Systems Used When Transferring

While most (70%) riders who transfer report a single type of transfer, many describe multiple types of transfers, suggesting that they use different routes to make their typical trips.

The majority of transfers are within Metro.

	All Riders Who Transfer	Seattle / North King	South King	East King
Metro bus to another Metro bus	85%	**88%**	83%	76%
Metro bus to streetcar	6%	5%	8%	5%
Metro bus or streetcar and ST Bus	23%	18%	23%	**44%**
Metro bus or streetcar and Link	18%	17%	**22%**	11%
Metro bus or streetcar and Sounder	6%	3%	**11%**	7%
Metro bus or streetcar and Pierce Transit	4%	3%	**8%**	<1%
Metro bus or streetcar and Community Transit	5%	6%	6%	3%
Metro bus or streetcar and a Water Taxi	1%	1%	1%	<1%
Other	1%	1%	<1%	1%

Question METAA: *Does your typical trip involve a transfer between…*
Base: *Riders who make one or more transfers (n_{2011} = 724)*

Fare Payment

Options for paying fares have changed significantly over the years. In the past, the system was quite complex with many different fare payment options. The ORCA Card was introduced in 2009 and offered a single instrument through which to purchase fares at various rates and through diverse channels. In 2011, U-Pass users were transitioned to the ORCA Card.

Riders were asked a number of questions about how they pay their fares. Those using an ORCA Card were asked about the type of card they have, what they have loaded on their card, as well as the extent to which they also use cash. Finally, there is a proposal to no longer accept cash fares on the buses. Questions were added to address the impact of this proposal.

	What We Found	Key Stats	What It Means
Fare Payment Method	More than three out of five riders use an ORCA Card to pay their fare. ORCA Card adopters are primarily those who formerly used a pass, a regional reduced fare permit, or U-Pass. More than one out of four (28%) riders continue to use cash as their only form of payment. The share of riders using cash only has declined by just 20 percent since the introduction of the ORCA Card in 2009. Those who continue to use cash are primarily Infrequent Riders and less affluent customers.	ORCA Card **63%** Cash Only **28%** RRFP / Senior Pass **3%**	Future adoption of the ORCA Card is likely to slow as non-adopters often have more durable reasons for not changing behaviors. Focus should be on messaging the real benefits of the ORCA Card (convenience and ease of use) as well as providing options for those who may not have online access or a credit or debit card to purchase a pass or conveniently add value to a card. Minimizing the lag time between adding value to a card and when it is available may encourage Infrequent Riders to purchase an ORCA Card. Eliminating the $5 fee for first-time users and otherwise making it easier to obtain a card may also encourage adoption.
ORCA Card Users	Use of the ORCA Card cuts across all rider segments although adoption is highest among Frequent Regular Riders. As a result, ORCA Card users mirror the characteristics of Metro customers overall, although a higher percentage are employed full-time and they are more affluent than riders generally.	All Riders **63%** Frequent RR **78%** Moderate RR **58%** Infrequent Riders **49%**	Cost is a barrier to adopting the ORCA Card, particularly among Metro's less affluent customers.

	What We Found	Key Stats	What It Means
Products On ORCA Card	The majority of riders have some type of pass loaded on their ORCA Card—pass (33%), U-Pass (12%), or RRFP (10%). Nearly two out of five riders have an E-Purse—either as their sole means of payment (25%) or in conjunction with something else (13%). The percentage saying they use an ORCA Card but have nothing loaded increased from 2% in 2010 to 7% in 2011.	Pass / U-Pass **45%** RRFP **10%** E-Purse **25%** E-Purse & Something Else **13%** Nothing **7%**	As the ORCA Card continues to roll out and more products are included on the card, riders appear to have easily adapted to requests to move their previous fare media over to the ORCA Card. The E-Purse provides a flexible and convenient option for those who prefer to pay as they ride or occasionally take trips that require an additional payment.
Pass Subsidies	The majority (59% of those with a pass on their ORCA Card receive a full or partial subsidy. However, the extent to which employers / schools subsidize passes has dropped sharply—from 86% in 2009 to 67% in 2010 to 59% in 2011.	Full Subsidy **37%** Partial Subsidy **22%** No Subsidy **42%**	The economy may be discouraging employers from subsidizing passes as a means to decrease costs. Some may also feel that they are providing differential benefits to those that use transit compared to those using other alternative modes or who drive. The recent increase in the transit benefit may cause employers to increasingly move from providing subsidies and instead encouraging employees to put money into a flexible spending account to pay for transit passes.
ORCA Card Non-Users – Familiarity	Non-users' familiarity with the ORCA Card increased significantly between 2010 and 2011. Familiarity continues to be higher among Regular Riders.	All Riders **65%** Familiar Regular Riders **68%** Familiar Infrequent Riders **62%** Familiar	Despite generally high levels of awareness, opportunities remain to increase non-users' familiarity and comfort with the ORCA Card. Focus should be on key benefits of the card as well as how to obtain the card rather than its mere existence.

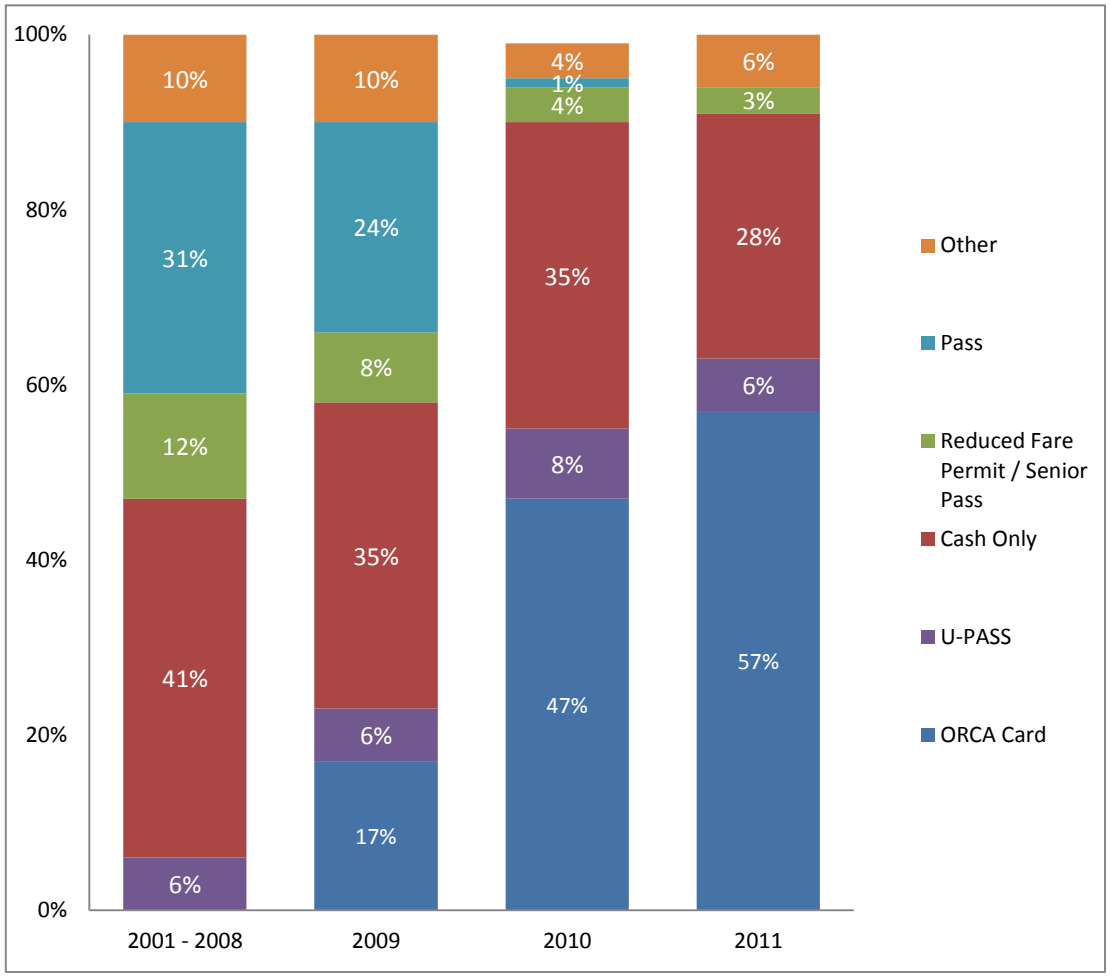
	What We Found	Key Stats	What It Means
ORCA Card Non-Users—Past Use / Considered Using	More than half (56%) of all Non-Users have never considered using an ORCA Card. Past use of ORCA Card increased significantly from 9% in 2010 to 16% in 2011. More than three out of five ORCA Card non-users indicate they would be likely to use the card in the future—up from 27% in 2009 and 52% in 2010. The opportunity is greatest among Frequent Regular Riders (63%) and Moderate Regular Riders (61%).	Past Use **16%** Considered / Not Used **27%** Never Considered / Never Used **56%** Likely to Use **61%**	There is significant opportunity increase consideration of the ORCA Card by touting its key benefits—convenience and ease of use. Metro may wish to consider additional research to understand why those who have used an ORCA Card in the past have stopped using it.
Cash	Cash continues to be a tool to avoid upfront costs among less affluent customers and a default choice for those who do not ride frequently enough to think they would benefit from an ORCA Card. Moving to a policy of no cash fares on the bus needs to be carefully considered as it is clear that could potentially cause 30% of those who currently ride and pay cash or as many as 20% of all riders to respond negatively—stop riding entirely or ride less.	Always Use Cash 31% Sometimes Use Cash **27%**	Communication regarding the "no-minimum" nature of ORCA and the ease of obtaining a card could convert some less frequent riders into cardholders, which in turn would facilitate their discretionary trips "on the fly." Point-of-purchase signage at pickup points like Westlake Center, in cooperation with mall management, could raise awareness of station locations for purchase.

Fare Payment

Figure 18: Trends in Fare Payment, 2001 to 2011 (All Riders)

ORCA Card adoption has more than tripled since its introduction in 2009. But growth rates have slowed.

- Early adoptions came from conversion of former pass users.
- However, cash fares have decreased from 41% to 28%. Riders paying cash only decreased sharply in 2009 and again in 2011.
- Use of reduced fare permits and senior passes that are not on an ORCA Card has also decreased significantly since 2009. Most qualified individuals seem to have switched from older media to an ORCA Card in 2009 and 2010.
- In 2011, the U-PASS became powered by the ORCA Card program bringing the combined use of ORCA to 63%.

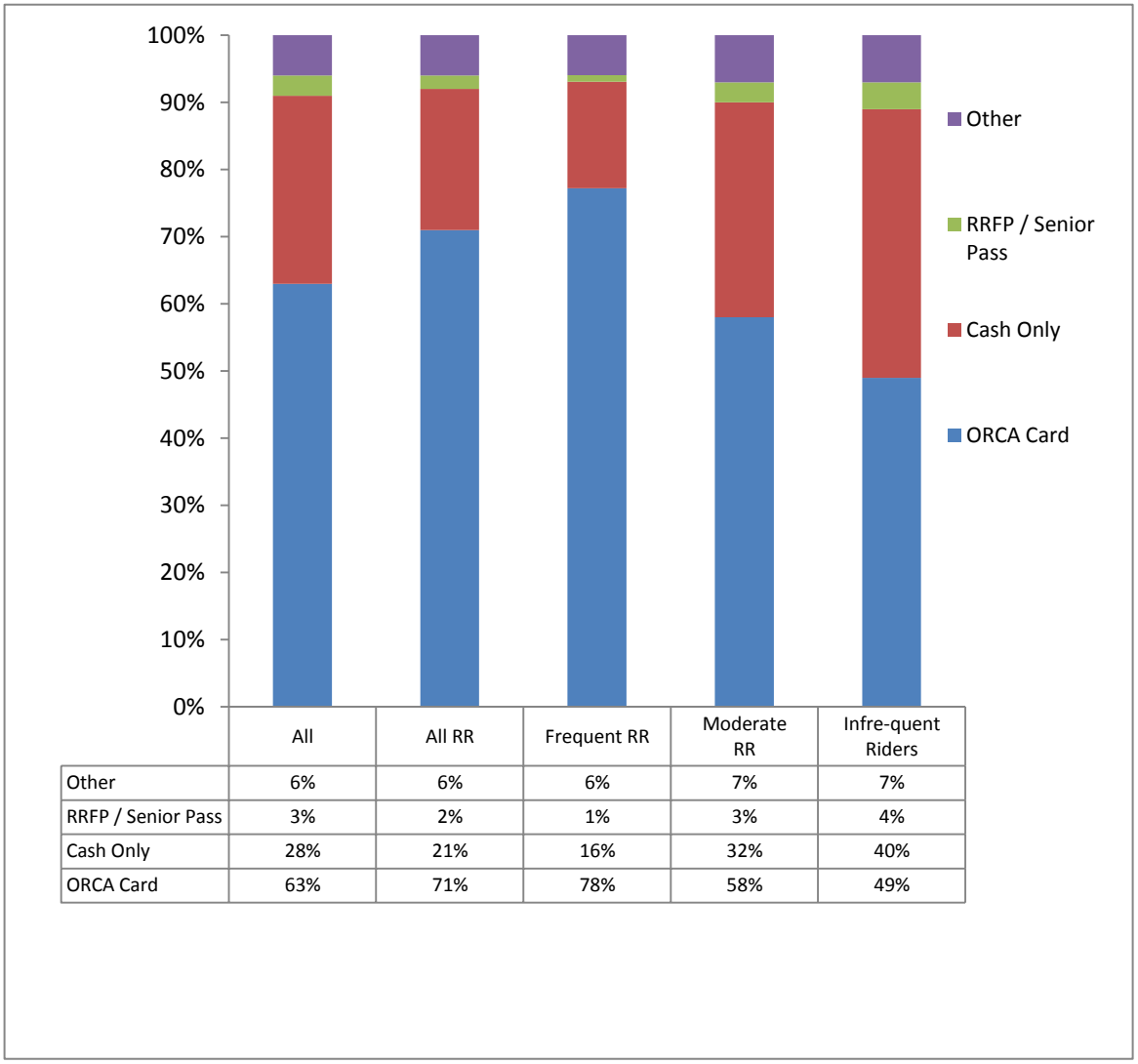


Question FARE1: *How do you usually pay your bus fare?*
Base: *All Regular and Infrequent Riders (n2011 = 1,455)*

Figure 19: Fare Payment 2011 by Rider Segments

As would be expected, use of the ORCA Card versus cash only is related to frequency of riding.

- Regular Riders are more likely than Infrequent Riders to use an ORCA Card. Seven out of ten Regular Riders use an ORCA Card. Moreover, Frequent Regular Riders are more likely than Moderate Regular Riders to use an ORCA Card.
- Infrequent Riders are somewhat more likely to use an ORCA Card than cash; however two out of five Infrequent Riders continue to use cash.



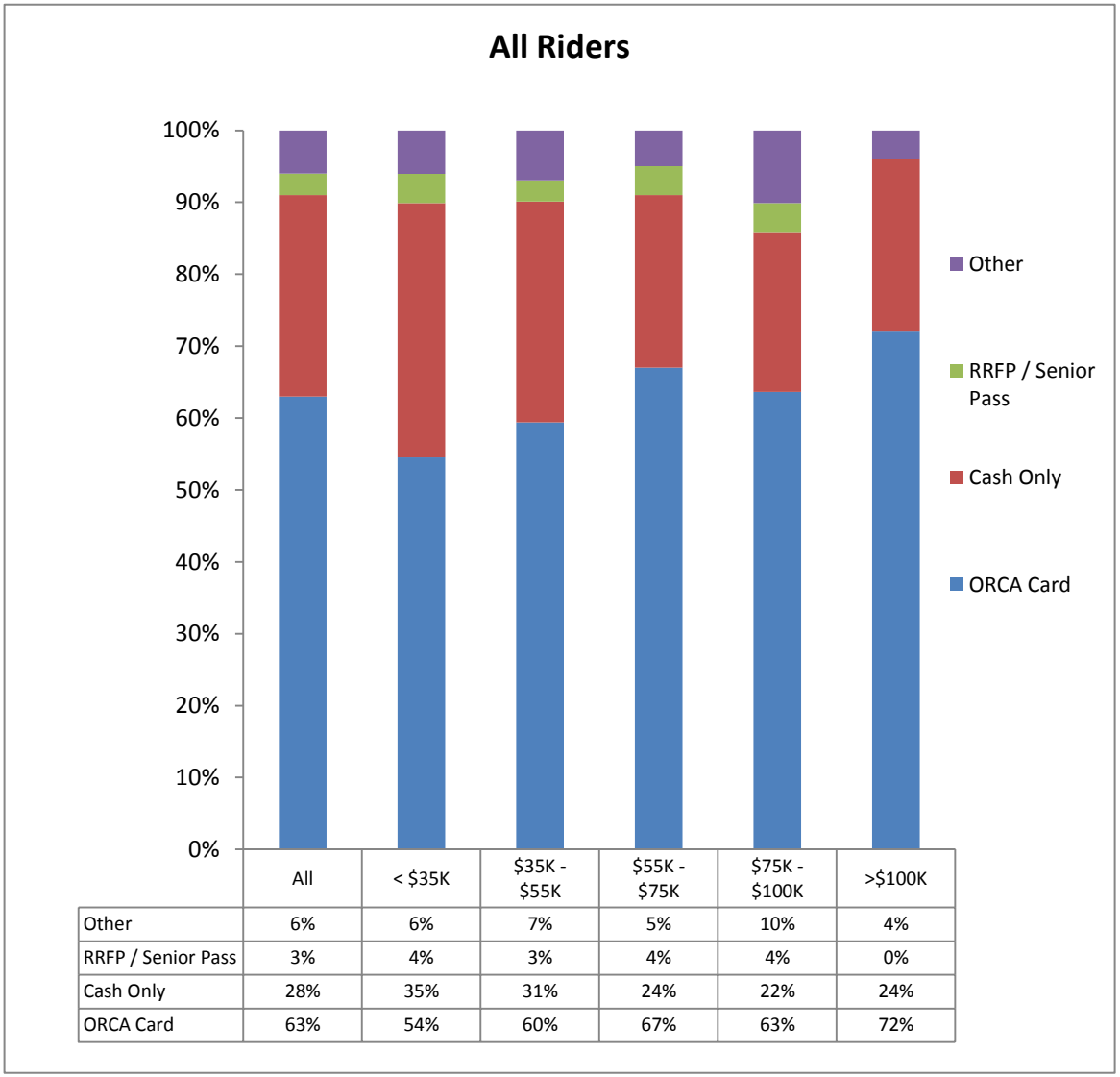
	All	All RR	Frequent RR	Moderate RR	Infre-quent Riders
Other	6%	6%	6%	7%	7%
RRFP / Senior Pass	3%	2%	1%	3%	4%
Cash Only	28%	21%	16%	32%	40%
ORCA Card	63%	71%	78%	58%	49%

Question FARE1: *How do you usually pay your bus fare?*
Base: *All Regular and Infrequent Riders (n2011 = 1,455)*

Figure 20: Fare Payment 2011 by Income

Choice of fare payment methods is also related to income.

- Nearly three out of four riders with household incomes greater than $100,000 use an ORCA Card compared to just over half of those with incomes below $35,000.
- More than one out of three riders with incomes below $35,000 continue to pay cash; three out of ten riders with incomes between $35,000 and $55,000 pay cash.



	All	< $35K	$35K - $55K	$55K - $75K	$75K - $100K	>$100K
Other	6%	6%	7%	5%	10%	4%
RRFP / Senior Pass	3%	4%	3%	4%	4%	0%
Cash Only	28%	35%	31%	24%	22%	24%
ORCA Card	63%	54%	60%	67%	63%	72%

Question FARE1: *How do you usually pay your bus fare?*
Base: *All Regular and Infrequent Riders (n2011 = 1,455)*

ORCA Card Users

Figure 21: Demographic Characteristics of ORCA Card Users

ORCA Card users are more likely than non-users to be:

- Younger
- Employed full-time
- More affluent

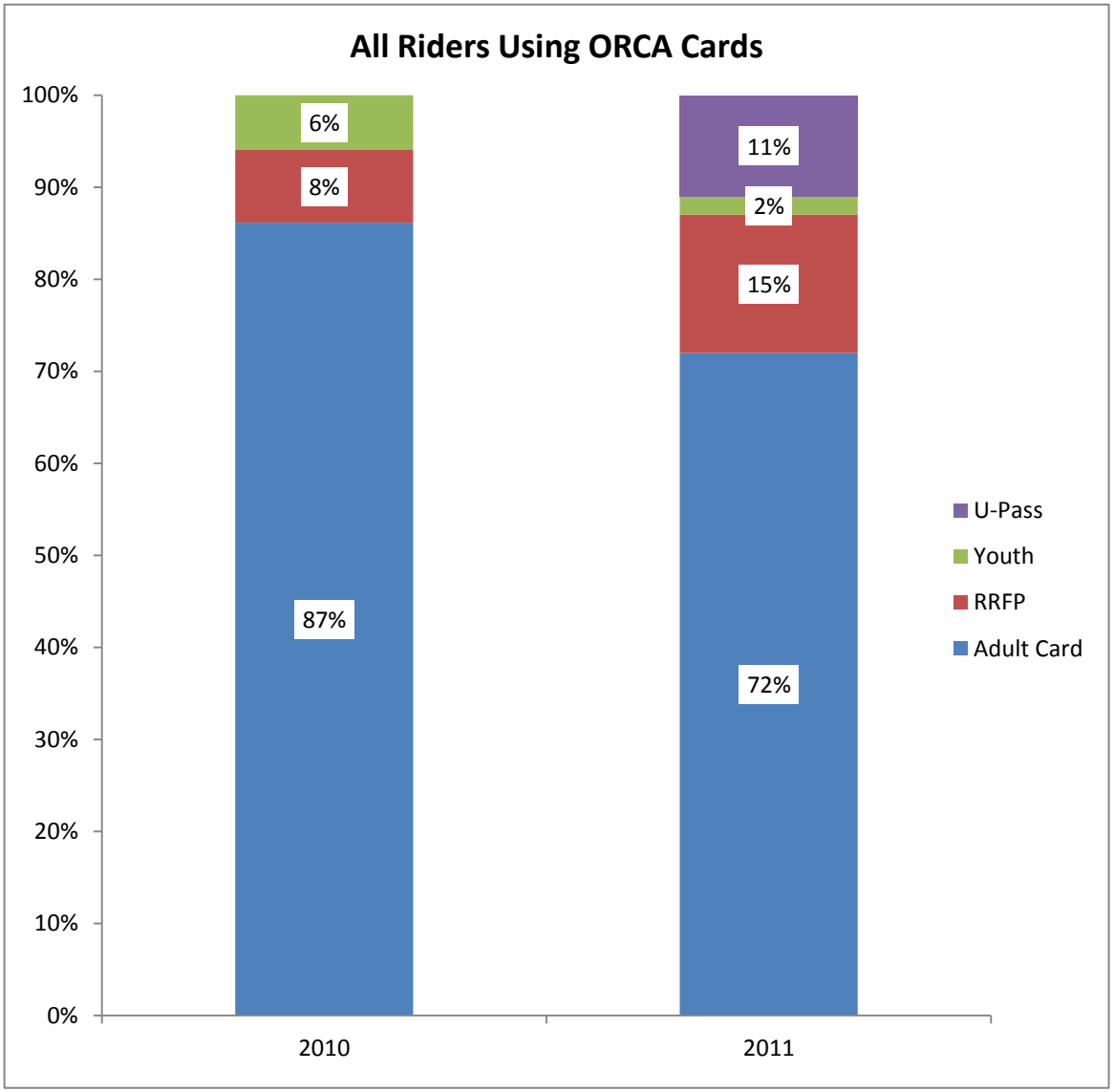
	ORCA Card	
	Non-Users	**Users**
Gender		
Male	53%	52%
Female	47%	48%
Age		
16 to 17	7%	3%
18 to 24	12%	9%
25 to 34	17%	**25%**
35 to 44	16%	**20%**
45 to 54	19%	18%
55 to 64	17%	17%
65 plus	**14%**	9%
Mean	43.6	42.3
Employment Status		
Employed Full-Time	36%	**60%**
Employed Part-Time	15%	10%
Self-Employed	10%	4%
Student (not working)	10%	8%
Homemaker	4%	2%
Retired	**17%**	8%
Unemployed / Other	8%	8%
Household Income		
Less than $15,000	**14%**	9%
$15,000 to $25,000	**12%**	7%
$25,000 to $35,000	8%	7%
$35,000 to $55,000	19%	16%
$55,000 to $75,000	13%	16%
$75,000 to $100,000	15%	15%
$100,000 to $150,000	11%	**17%**
$150,000 or Greater	9%	**13%**

Figure 22: Fare Type on Card

The majority of ORCA Card users have an adult card.

As noted, moving RRFP and U-Passes to the ORCA Card has had a significant impact on the types of fares on the card—with most of the growth in card use accounted for by this change.

The percentage of ORCA Cards that are youth cards has decreased significantly.



Question OU5: *Is your ORCA card an adult card, youth card, reduced regional fare permit, or a UPASS*
Base: *Regular and Infrequent Riders who Pay Fare with ORCA Card (n2011 = 1,001)*

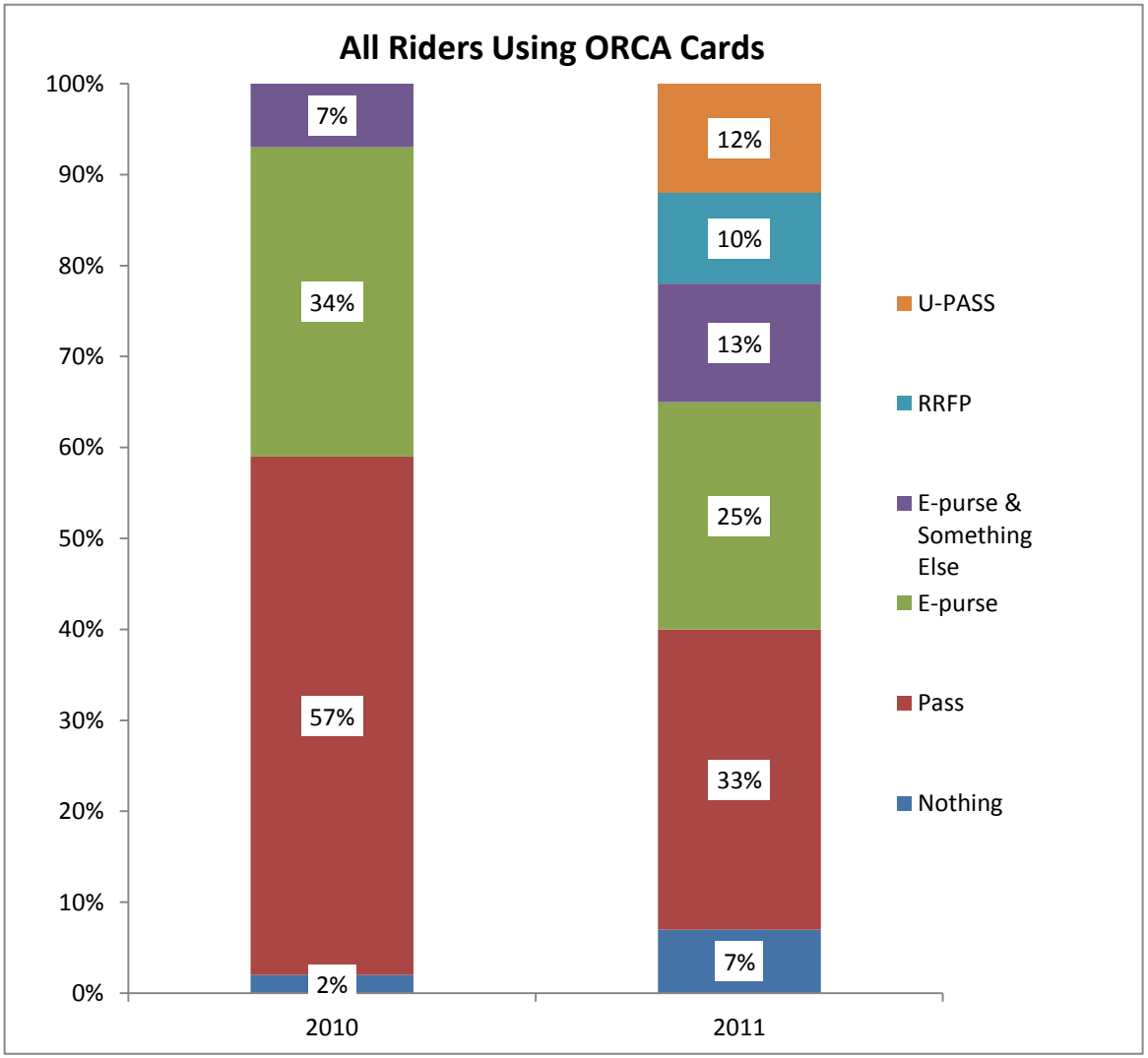
Figure 23: Products on ORCA Card

The introduction of RRFP and U-PASS on the ORCA Card has caused the mix of products loaded on ORCA Cards to change.

The percentage with a single product (pass or E-purse only) decreased with an increase in those with both an E-purse and something else.

There has been a significant increase in the percentage of ORCA Card holders who say they have "nothing" loaded on their cards.

- Open-ended responses suggest that many of these customers have simply not loaded money into their E-purse or have misplaced or lost their cards.



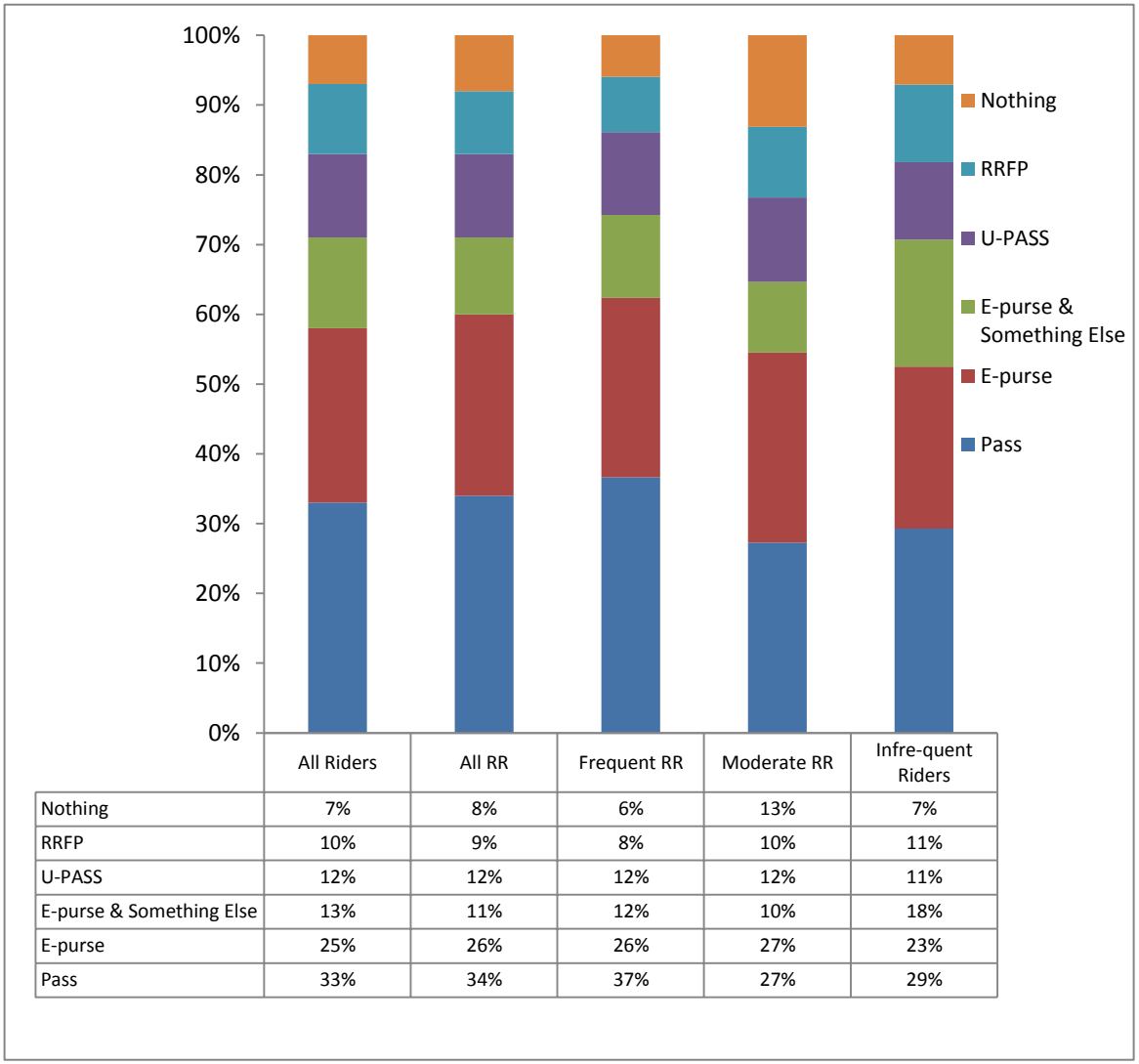
Question OU7: *What product or products do you have loaded on your ORCA card?*
Base: *Regular and Infrequent Riders who Pay Fare with ORCA Card (n2011 = 1,001)*

Figure 24: Products on ORCA Card (2011) by Rider Segments

In general, the product(s) loaded on a rider's ORCA Card varies by riding frequency.

- As expected, Regular Riders are more likely than Infrequent Riders to have a pass loaded on their ORCA Card. Nearly two out of five Frequent Regular Riders have a pass on their card.
- Moderate Regular Riders are more similar to Infrequent Riders in terms of the products they use.

Moderate Regular Riders are the most likely to have nothing loaded on their ORCA Card.



	All Riders	All RR	Frequent RR	Moderate RR	Infre-quent Riders
Nothing	7%	8%	6%	13%	7%
RRFP	10%	9%	8%	10%	11%
U-PASS	12%	12%	12%	12%	11%
E-purse & Something Else	13%	11%	12%	10%	18%
E-purse	25%	26%	26%	27%	23%
Pass	33%	34%	37%	27%	29%

Question OU7: *What product or products do you have loaded on your ORCA card?*
Base: *Regular and Infrequent Riders who Pay Fare with ORCA Card (n2011 = 1,001)*

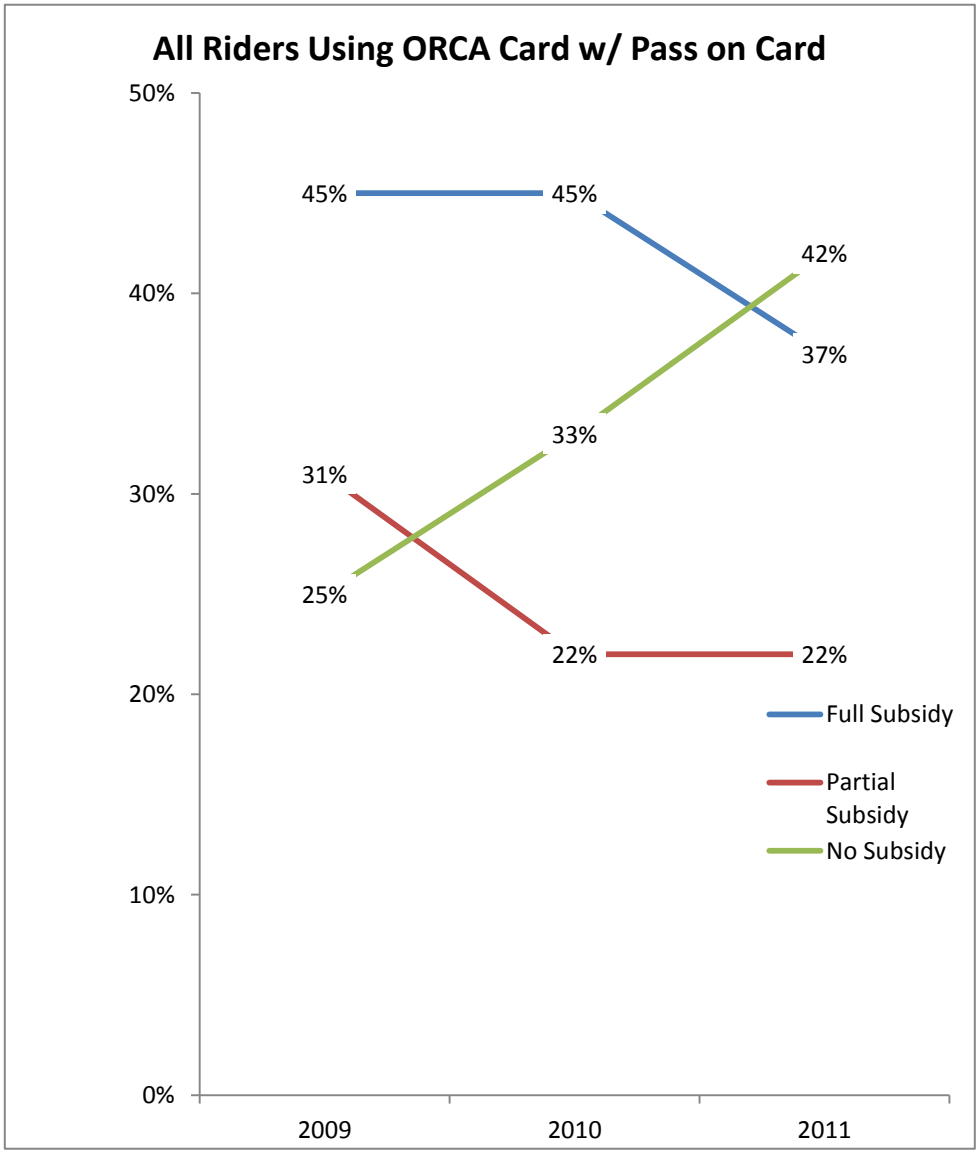
Figure 25: Pass Subsidies

While the majority (59%) of ORCA Card users with a pass loaded on their card receive a full or partial subsidy from their employer or school for that pass, the extent to which employers and schools provide subsidies for transit passes has decreased sharply since 2009.

- The extent to which employers and schools provided partial subsidies dropped sharply between 2009 and 2010.
- On the other hand, the percentage offering full subsidies dropped between 2010 and 2011.

While a smaller segment, the extent to which schools provide subsidies decreased more than those offered by employers.

	2009	2010	2011
Employers	65%	60%	55%
Schools	11%	7%	4%



***Question OU6**: Does your employer or school pay for part or all of your ORCA pass or E-Purse?*
***Base**: ORCA Card users who have a pass or e-purse loaded and are Commuters and (n_{2011} = 447)*

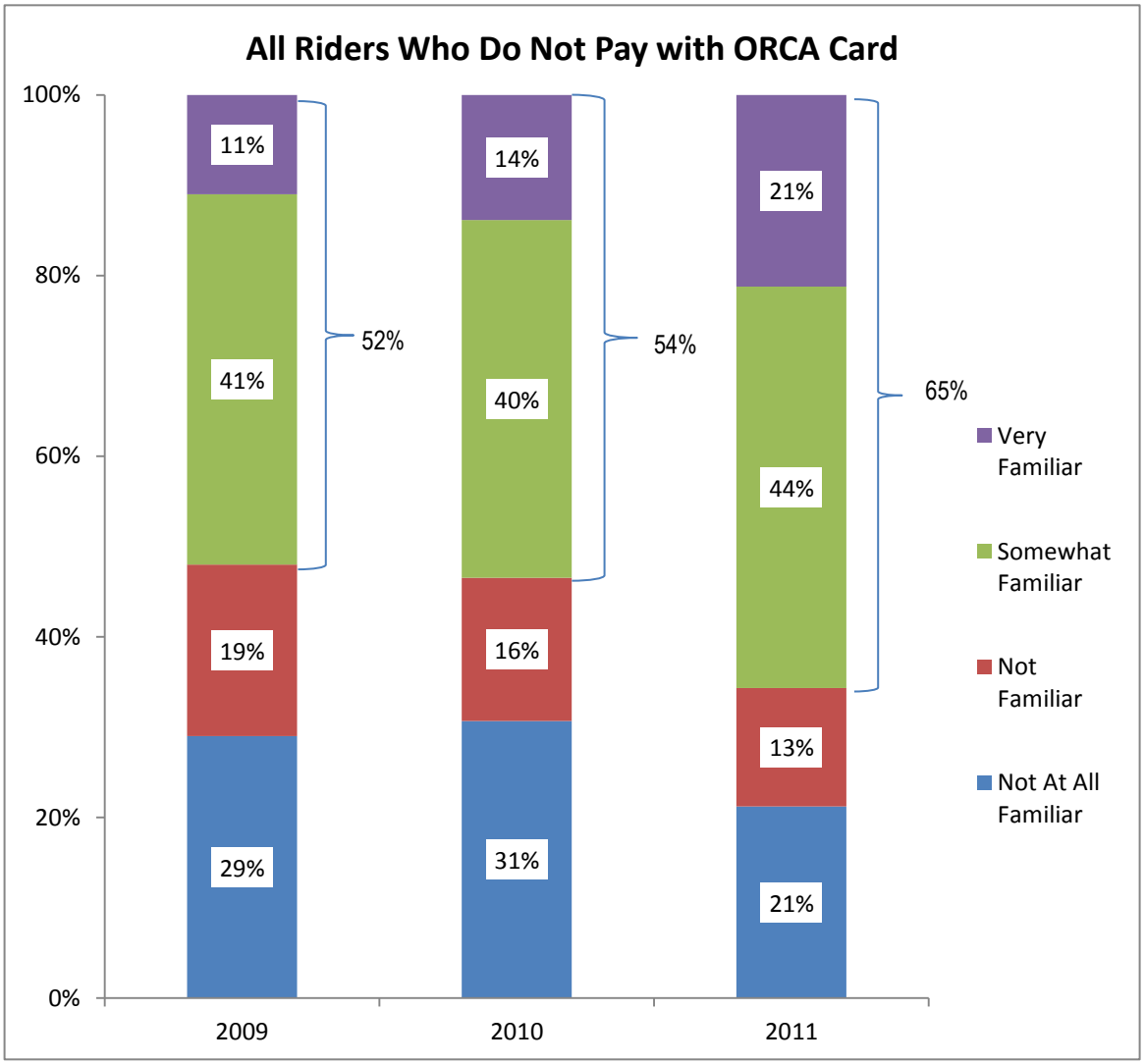
ORCA Card Non-Users

Figure 26: Non-Users' Familiarity with the ORCA Card

Even as the percentage of non-users has declined, familiarity with the ORCA Card among remaining non-users increased significantly in 2011. However, one out of three non-users is not familiar with the ORCA Card.

Overall familiarity is somewhat higher among Regular Riders than Infrequent Riders. Moreover, three times as many Regular Riders as Infrequent Riders say they are "very familiar" with the ORCA Card.

	Regular Riders	Infrequent Riders
Total Familiar	**68%**	62%
Very Familiar	**31%**	10%
Somewhat Familiar	37%	**52%**
Not Familiar	15%	12%
Not At All Familiar	17%	26%



Question ORCA1: *How familiar are you with the ORCA card?*
Base: *Regular and Infrequent Riders who do not use an ORCA Card (n2011 = 454)*

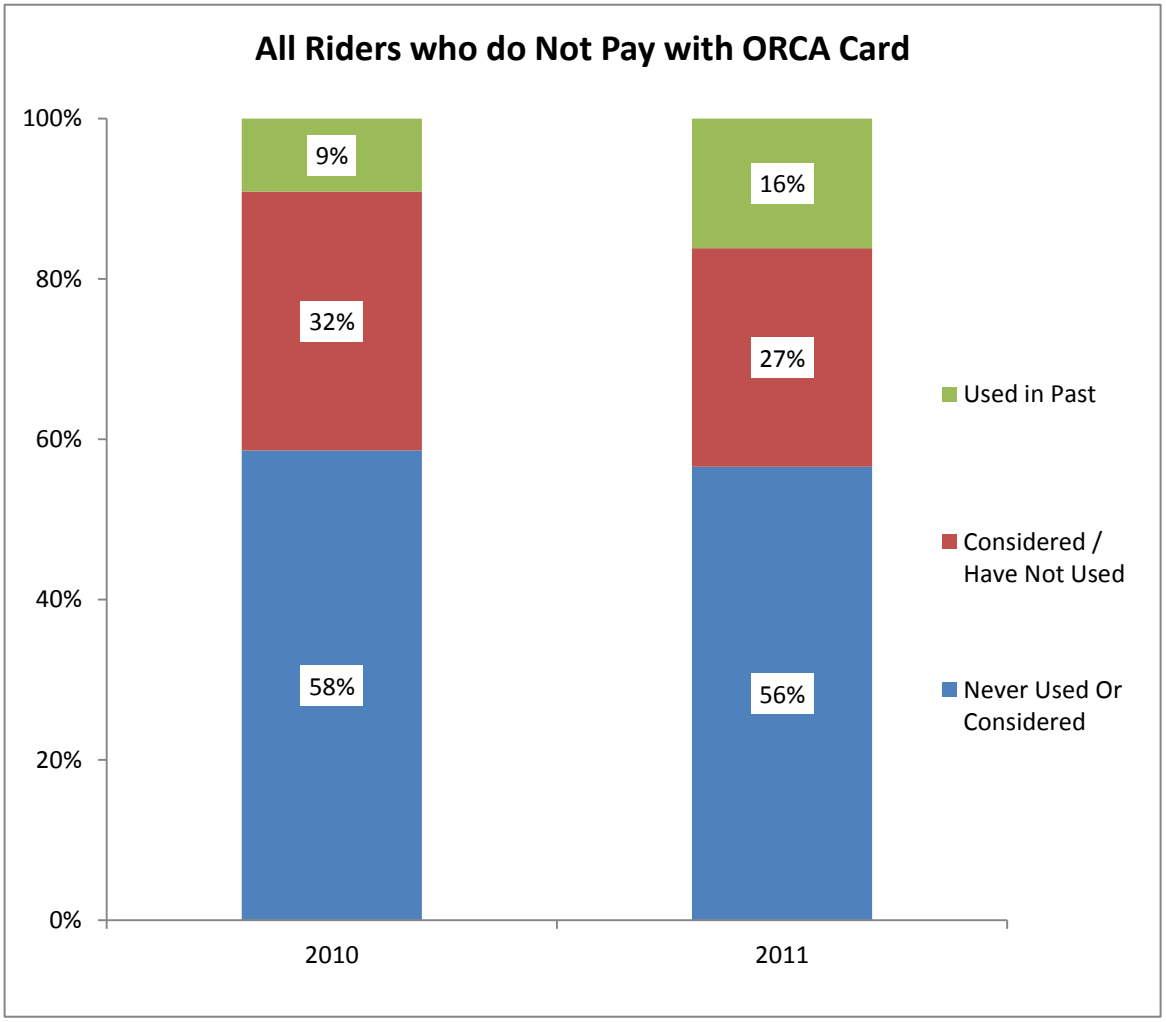
Figure 27: Non-Users' Past Use or Considered Use of the ORCA Card

Compared to 2010, nearly twice as many ORCA Card non-users in 2011 report having used the ORCA Card in the past.

- Past use is twice as high among Frequent Regular Riders compared to Moderate Regular Riders.
- Similarly, past use is also more than twice as high for Moderate Regular Riders as Infrequent Riders. Infrequent Riders are also less likely to have considered using the ORCA Card.

The primary reason given for not using an ORCA Card is that they do not ride often enough.

	Frequent Regular Riders (11+)	Moderate Regular Riders (5-10)	Infrequent Riders (1-4)
Used in Past	**34%**	**16%**	7%
Considered / Have Not Used	29%	30%	24%
Never Used / Considered	37%	53%	**67%**



***Question NO2**: Have you ever used or considered using an Orca card??*
***Base:** Regular and Infrequent Riders who do not use an ORCA Card (n2011 = 454)*

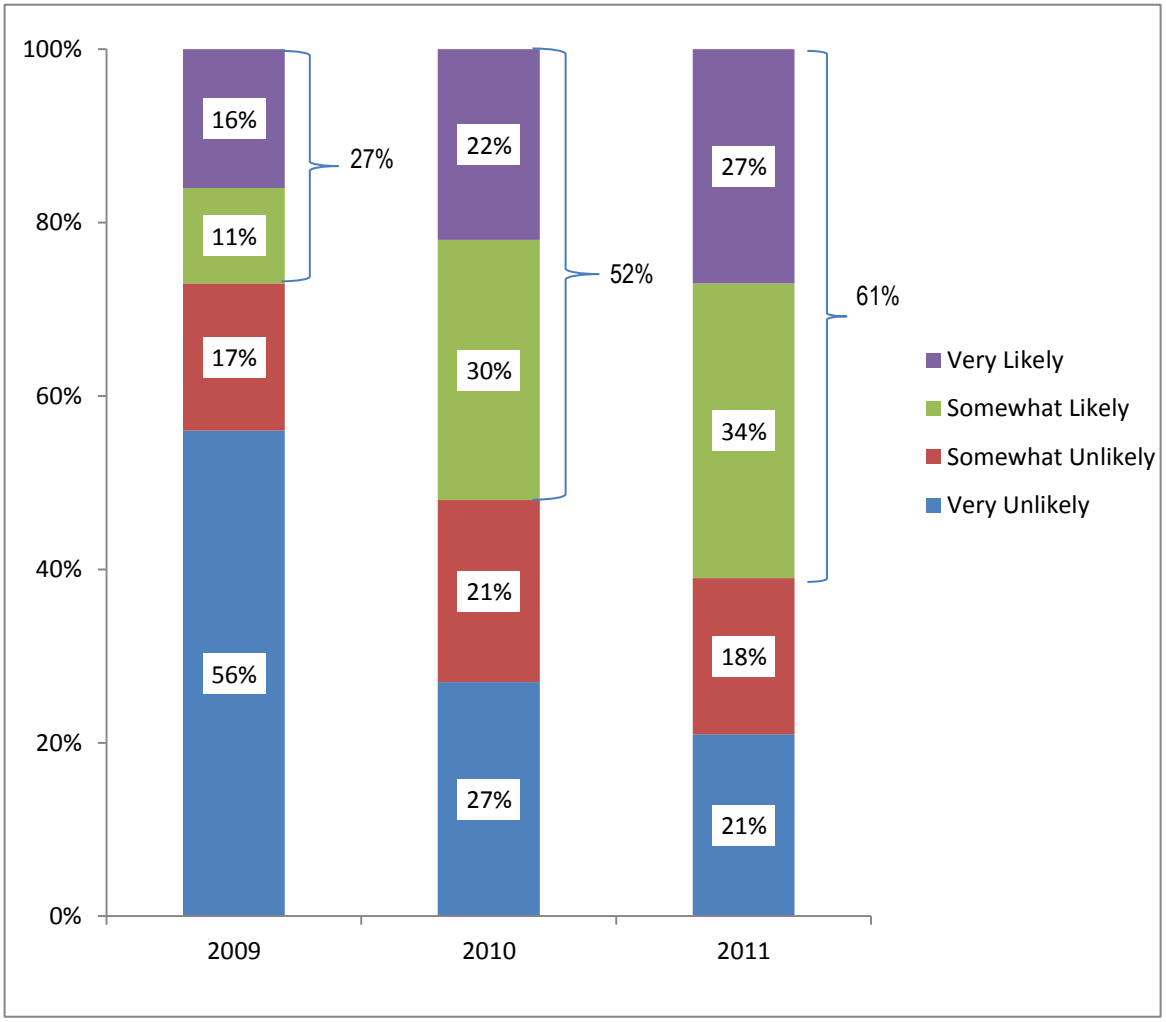
Figure 28: Non-Users' Likelihood of Using the ORCA Card

Non-users who reported at least some familiarity with the ORCA Card are increasingly likely to suggest they will use the card in the future. Three out of five non-users say they are at least somewhat likely to use an ORCA Card.

While Frequent Regular Riders and Moderate Regular Riders are equally likely to say they would use an ORCA Card, Frequent Regular Riders are more likely to say they are very likely while Moderate Regular Riders are more likely to say somewhat likely.

	Frequent Regular Riders (11+)	*Moderate Regular Riders (5-10)*	*Infrequent Riders (1-4)*
Total Likely	**63%**	**61%**	56%
Very Likely	36%	25%	21%
Somewhat Likely	29%	36%	35%
Somewhat Unlikely	15%	21%	17%
Very Unlikely	20%	19%	27%
Total Unlikely	35%	40%	44%

There are no demographic characteristics that clearly identify non-users who are more or less likely to adopt an ORCA Card.



***Question NO3**: From what you have seen, read, heard about the ORCA program, would you be likely or unlikely to purchase an ORCA card in the future? Would that be very or somewhat likely / unlikely? Neutral category excluded.*
***Base:** Regular and Infrequent Riders who do not use an ORCA Card (n2011 = 454)*

Cash Payments

Figure 29: Cash Payments

Nearly three out of five Riders use cash sometimes (27%) or always (31%). Primary reason given for paying with cash is that they don't ride that often.

- Moderate and Infrequent Riders' use of cash is relatively similar, although a greater percentage of Infrequent Riders always use cash.

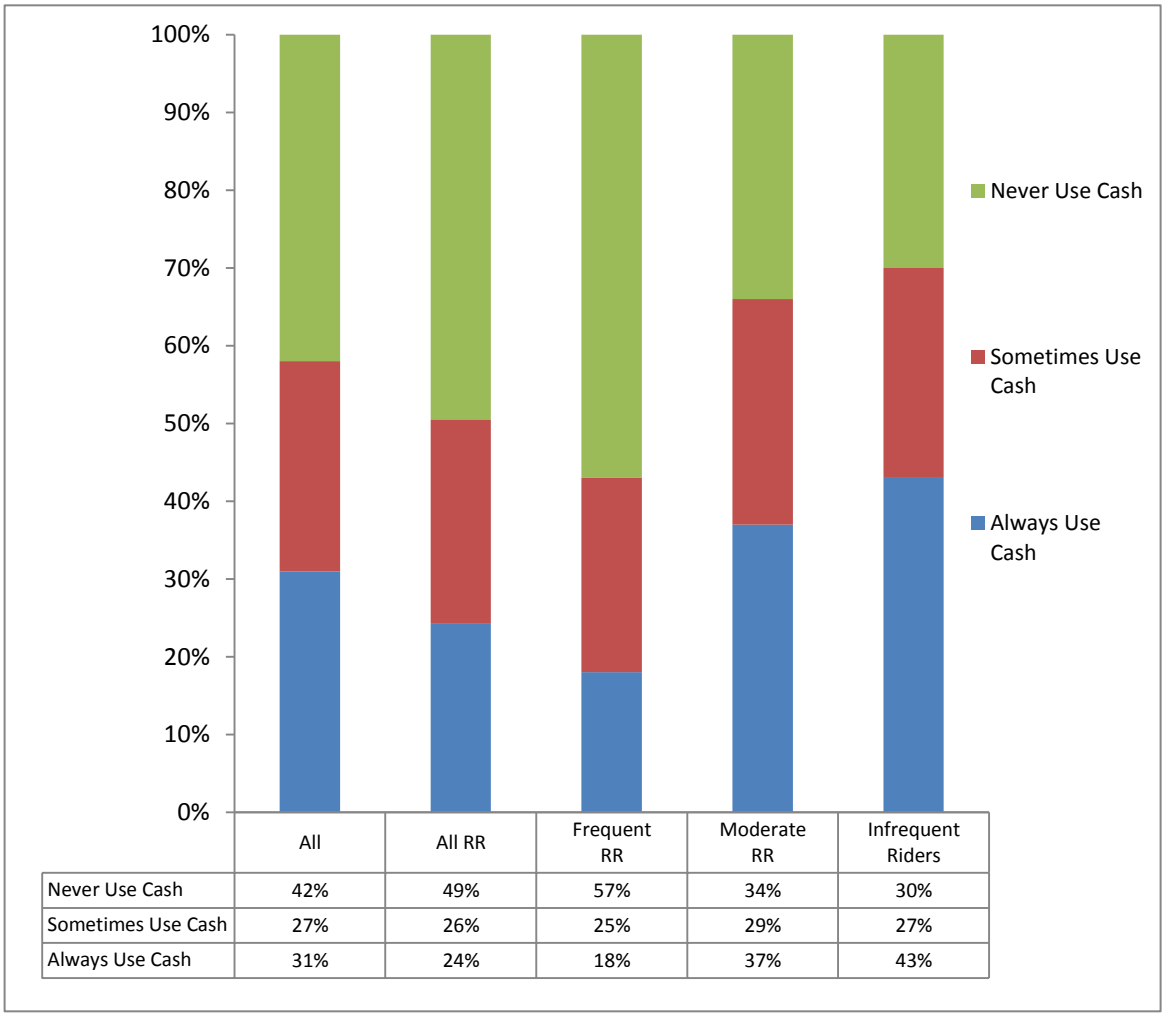
Nearly three out of five Frequent Regular Riders never use cash when riding.

As would be expected, use of cash varies by primary fare payment method.

- A small segment, 94 percent of those continuing to use an RRFP or Senior Pass that is not on an ORCA Card sometimes use cash.
- One out of three ORCA Card users sometimes use cash—23% of those with a pass on their card sometimes use cash; 50 percent of those with an E-Purse sometimes use cash.

	ORCA Card	RRFP*
Always Use Cash	3%	0%
Sometimes Use Cash	32%	**94%**
Never Use Cash	**66%**	6%

**Reduced Fare Permits not on an ORCA Card*



	All	All RR	Frequent RR	Moderate RR	Infrequent Riders
Never Use Cash	42%	49%	57%	34%	30%
Sometimes Use Cash	27%	26%	25%	29%	27%
Always Use Cash	31%	24%	18%	37%	43%

Questions FARE1: *How do you usually pay your bus fare?* / ***CASH1:*** *Do you ever use cash to pay for any portion of your fare?*
Base: *All Regular and Infrequent Riders (n2011 = 1,455)*

Figure 30: Demographic Characteristics of Those Using Cash

While Work Commuters are more likely than Non-Commuters and School Commuters to never use cash, income is clearly the key correlate to cash payments.

	Always Use Cash	Sometimes Use Cash	Never Use Cash
	Work Commuters		
< $35K	**20%**	**28%**	9%
$35K - $55K	22%	21%	16%
$55K - $75K	10%	10%	15%
$75K Plus	48%	41%	**59%**
	School Commuters		
< $35K	**50%**	**58%**	40%
$35K - $55K	19%	5%	10%
$55K - $75K	6%	16%	10%
$75K Plus	25%	21%	**40%**
	Non-Commuters		
< $35K	**47%**	**43%**	27%
$35K - $55K	16%	12%	24%
$55K - $75K	14%	22%	22%
$75K Plus	22%	22%	27%

	Always Use Cash	Sometimes Use Cash	Never Use Cash
Gender			
Male	54%	45%	57%
Female	46%	**55%**	43%
Age			
16 to 17	6%	6%	2%
18 to 24	13%	8%	7%
25 to 34	18%	25%	23%
35 to 44	17%	18%	20%
45 to 54	20%	15%	19%
55 to 64	17%	14%	19%
65 plus	10%	13%	11%
Mean	42.2	42.6	44.0
Commuter Status			
Work Commuter	47%	48%	**77%**
School Commuter	**12%**	**13%**	5%
Non-Commuter	42%	39%	18%
Household Income			
Less than $15,000	**14%**	**17%**	4%
$15,000 to $25,000	**14%**	**10%**	3%
$25,000 to $35,000	7%	10%	6%
$35,000 to $55,000	19%	16%	17%
$55,000 to $75,000	12%	15%	16%
$75,000 to $100,000	12%	15%	17%
$100,000 to $150,000	11%	13%	19%
$150,000 or Greater	11%	4%	17%
Median	$51,422	$51,545	$79,724

Figure 31: Reported Behavior if Metro No Longer Accepted Cash on Buses

More than one out of three (36%) riders who currently pay cash when riding would respond negatively, i.e., drive, stop riding or ride less, if Metro no longer accepted cash on the bus.

- Infrequent Riders are the most likely to respond negatively to this change—41% would stop riding or ride less.

Two out of five (40%) riders who currently pay cash when riding would either get an ORCA Card, add an E-Purse to an existing card, or add value to their E-Purse.

	All Riders Who Use Cash	Always Use Cash	Sometimes Use Cash
Change Fare Payment (Net)	64%	**66%**	61%
Get an ORCA Card	31%	**48%**	12%
Buy Tickets	22%	23%	22%
Get an E-Purse / Add Value to E-Purse	16%	10%	23%
Respond Negatively (Net)	36%	34%	39%
Stop Riding	16%	18%	13%
Ride Less	10%	8%	12%
Drive	12%	15%	8%

Multiple responses allowed. Net represents those giving one or more responses in this category.

Questions CASH2: *What would you do if cash were not accepted on Metro buses?*
Base: *All Regular and Infrequent Riders who Always or Sometimes Pay with Cash (n2011 = 717)*

Commuters

A Commuter is defined as someone who works outside the home or attends school at least three days a week. Commuters were then asked the number of days they commuted for either work or school purposes. For analytical purposes, commuters are divided into the following two groups:

- Work Commuters are employed full- or part-time or are self-employed and work outside the home three or more days per week. Students who work more days than they attend school are included in this group.
- School Commuters include those who only attend school and those who attend school more days than they work.

	What We Found		What It Means
Commuters	Reflecting the improving economy, there has been a slight increase in the percentage of King County adults who commute to work or school (from 59% to 61%), notably in Seattle / North King County and East King County. School Commuters represent a small (10% of all commuters) but important segment, with distinct demographic and transit use characteristics.	Work Commuters **61%** School Commuters **6%** Non-Commuters **39%**	As the economy continues to improve, ridership growth is likely to continue. However, the slow growth in the number of commuters indicates that ridership growth is also likely to be slow. Work and School Commuters are likely to have different needs and expectations for service. While School Commuters are a small segment, they are distinct from Work Commuters and are likely to have different needs and expectations for transit services.
Travel Mode to Work / School	Nearly two out of three commuters drive alone to work or school; there has been little change over the years. One out of five commuters use Metro (16%) or another transit system (3%); this is largely driven by high transit use among Seattle / North King County commuters (28%).	Drive Alone **63%** Metro Bus **16%** Other Transit **3%** Carpool / Vanpool **8%** Other **10%**	Even with high gas prices and parking costs, commuters are creatures of habit and the benefits of using transit to travel to work or school are not readily apparent.

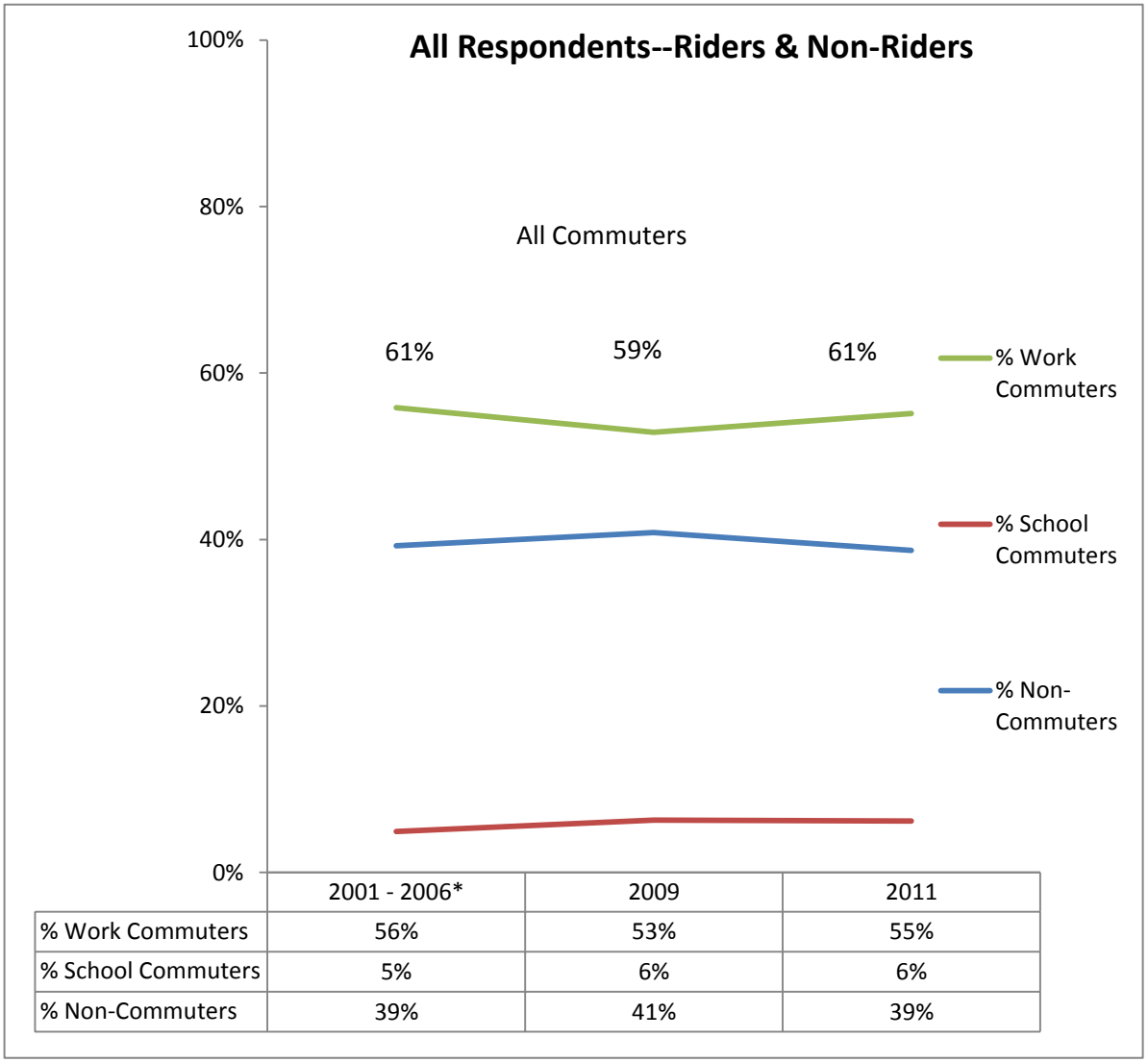
Commute Destinations	The percentage of commuters traveling to downtown Seattle and surrounding areas has remained relatively stable. At the same time, there has been a significant decrease in the percentage of commuters traveling to other North King County destinations. Most commuters continue to work and live in the same geographic area. However, this has changed somewhat over the past several years.	Downtown Seattle **26%** Other North King **16%** Downtown Bellevue **7%** Other East King **20%** South King **20%** Other **11%** % Living / Working in Same Area **69%**	The decrease in those living and working in the same region most likely reflects existing economic conditions, with commuters having to travel to existing jobs outside their local areas.
Travel Time & Distance to Work	Over the years, there has been little change in the distance commuters travel to work or the amount of time it takes.	Distance to Work 11.3 miles Travel Time 26.9 minutes	Transportation improvements are keeping pace with regional growth.
Parking Subsidies	The majority (66%) of commuters continue to get parking subsidized by their employers. There has been a significant increase in the percentage of employees who have free parking that is not provided by their employers or schools (from 3% in 2009 to 10% in 2011)	Full Subsidy 58% Partial Subsidy 8% Free Parking / Not Employer Paid 10% Employee Pays for Parking 23%	Unlike transit passes, employers continue to subsidize parking. While in many instances these costs are low (in areas outside downtown Seattle and downtown Bellevue), this would suggest that free parking is seen as a greater employee benefit than free or subsidized transit passes. Moreover, employers may feel the need to provide parking where transit service is less available.

Figure 32: Trends in Commuter Status (All Respondents)

The percentage of adult King County residents who are commuters has increased slightly from 2009, returning to 2006 and earlier levels.

- The increase in commuters is greatest in Seattle / North King County.
- The percentage of commuters living in South King County decreased and is at its lowest ever.

	2001 – 2006*	2009	2011
	Total Commuters		
Seattle / North King	64%	58%	65%
South King	59%	62%	57%
East King	59%	57%	62%



	2001 - 2006*	2009	2011
% Work Commuters	56%	53%	55%
% School Commuters	5%	6%	6%
% Non-Commuters	39%	41%	39%

COMMUTER—Computed variable based on: GEN3: *How many days a week do you [work/attend school]?*
Base: *All Respondents (n_{2011} = 2,521)*
** Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2007, 2008, and 2010.*

Figure 33: Trends in Riders' Commuter Status (Riders Only)

The percentage of commuters is significantly higher among Riders (70%) than among Non-Riders (46%).

- Moreover, the percentage of commuters is higher among Regular Riders than among Infrequent Riders.

As with the general population, the percentage of Riders who were commuters dropped in 2009 but returned to previous levels in 2010. However, there are differences between Regular and Infrequent Riders.

- Among Regular Riders, the percentage of commuters peaked in 2010 and decreased again in 2011. This is due to a decrease in the percentage of Regular Riders who are School Commuters.
- Among Infrequent Riders, the percentage of Work Commuters has decreased steadily since 2009, while the percentage of School Commuters has been increasing.

	2001 – 2008	2009	2010	2011
	All Riders			
All Commuters	70%	68%	71%	70%
Work Commuters	61%	57%	59%	59%
School Commuters	9%	11%	12%	11%
Non-Commuters	30%	32%	29%	30%
	Regular Riders			
All Commuters	76%	71%	79%	74%
Work Commuters	65%	59%	64%	64%
School Commuters	11%	12%	15%	11%
Non-Commuters	24%	29%	21%	26%
	Infrequent Riders			
All Commuters	57%	63%	60%	61%
Work Commuters	52%	55%	53%	50%
School Commuters	5%	8%	7%	11%
Non-Commuters	43%	38%	40%	38%

COMMUTER—Computed variable based on: GEN3: *How many days a week do you [work/attend school]?*
Base: *All Regular and Infrequent Riders (n2011 = 1,455); Regular Riders (n2011 = 1,241); Infrequent Riders (n2011 = 214B*
**Base is Riders only. Riders are surveyed every year so all years included.*

Figure 34: Commuters' Demographic Characteristics

In general, Work Commuters are:

- More likely to be men than women.
- Between the ages of 25 and 64.
- Relatively affluent, with the majority having household incomes of $75,000 or greater.

Work Commuters who are riders do not differ significant from Work Commuters generally.

In general, School Commuters are:

- Equally likely to be men and women.
- Between the ages of 16 and 24; 34% are between the ages of 16 to 17 and 40% are 18 to 24.
- Less affluent, with the majority reporting a household income below $50,000. School Commuters who are riders are less affluent than School Commuters generally; more than half have household incomes below $35,000.

In general, Non-Commuters are:

- More likely to be women than men. However, Non-Commuters who are riders are almost equally likely to be men versus women.
- Older, more than half are 55 plus and 42% are retired.

	All Commuters	Work Commuters	School Commuters	Non-Commuters
		All Respondents		
Gender				
Male		**58%**	**49%**	38%
Female		42%	51%	62%
Age				
16 to 24		7%	74%	5%
25 to 34		**25%**	15%	9%
35 to 44		**26%**	7%	14%
45 to 54		**23%**	3%	17%
55 to 64		**16%**	0%	**21%**
65 plus		4%	0%	**34%**
Mean		42.5	22.9	55.2
Household Income				
Less than $35,000		12%	**40%**	35%
$35,000 to $55,000		20%	**20%**	16%
$55,000 to $75,000		15%	14%	16%
$75,000 to $100,000		**19%**	9%	14%
$100,000 or Greater		**34%**	17%	19%
Median		$79,553	$45,562	$53,818
			Riders Only	
Gender				
Male		56%	49%	47%
Female		44%	51%	53%
Age				
16 to 24		7%	74%	9%
25 to 34		**28%**	15%	12%
35 to 44		**25%**	5%	11%
45 to 54		**21%**	5%	17%
55 to 64		17%	1%	**22%**
65 plus		3%	1%	**30%**
Mean		41.7	23.1	52.2
Household Income				
Less than $35,000		15%	**52%**	41%
$35,000 to $55,000		19%	12%	16%
$55,000 to $75,000		13%	12%	19%
$75,000 to $100,000		18%	6%	12%
$100,000 or Greater		35%	18%	11%
Median		$78,441	$34,043	$44,645

Figure 35: Commuters' Transit Use

Work Commuters are:

- Primarily Non-Riders. However, if they ride, they are relatively frequent riders; half are Frequent Regular Riders, taking 11 or more one-way trips per month.
- Long-time riders.
- Choice riders.
- A significant percentage ride during peak hours only.

School Commuters are:

- Equally likely to be Riders and Non-Riders. If they ride, they are a mix of Infrequent Riders (37%), Moderate Regular Riders (23%), and Frequent Regular Riders (40%).
- Less experienced riders—21% started riding in the past year and 49% have been riding less than 5 years.
- More likely to be transit dependent.
- Riders during both peak and off-peak hours.

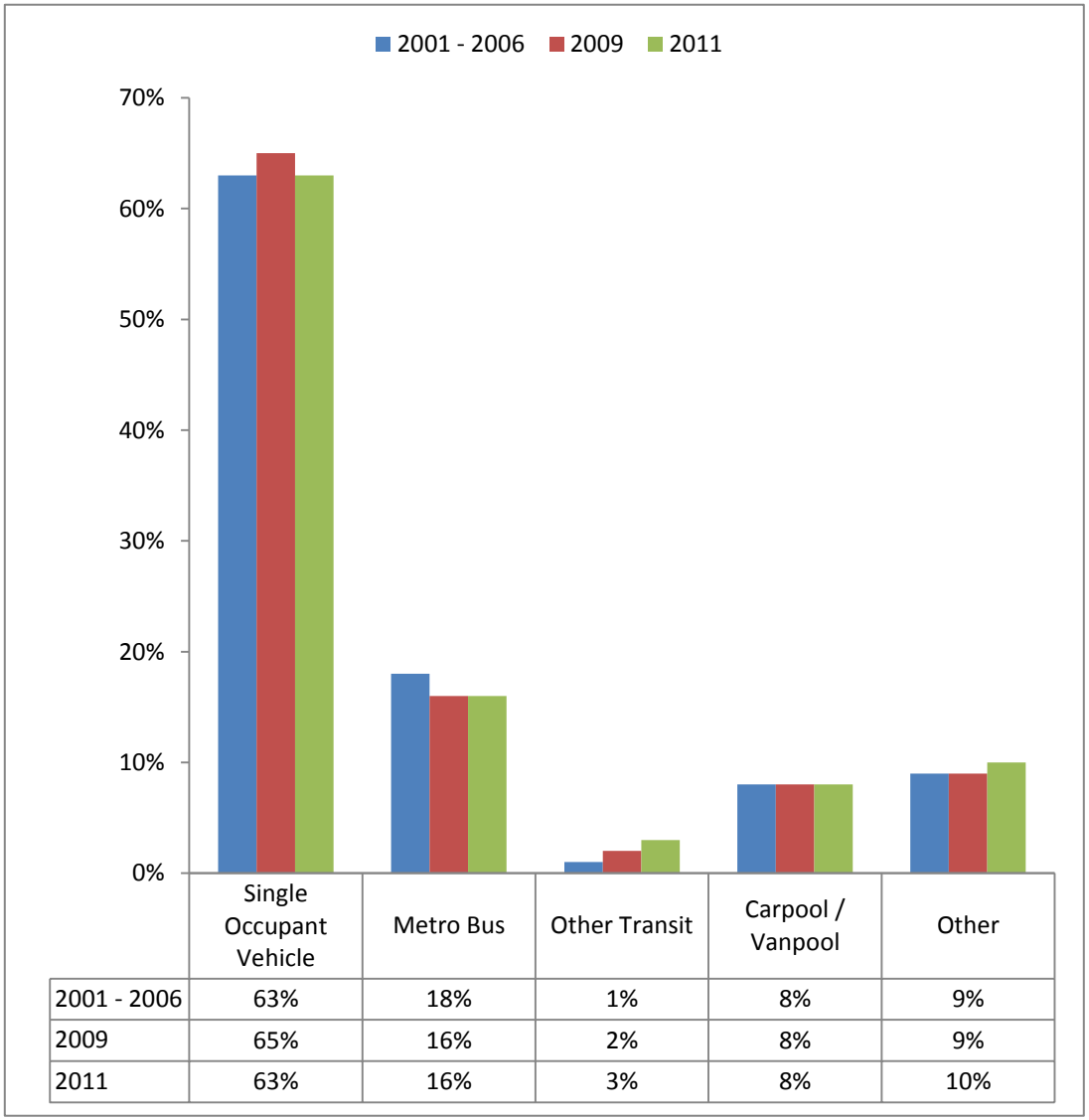
	All Commuters	Work Commuters	School Commuters	Non-Commuters
			All Respondents	
Rider Status				
Regular Riders		20%	30%	12%
Infrequent Riders		9%	18%	10%
Non-Riders		71%	52%	79%
			Riders Only	
Frequency of Riding				
1 to 4		31%	37%	46%
5 to 7		9%	7%	14%
8 to 10		8%	16%	12%
11 to 20		18%	11%	14%
21 or More		33%	29%	14%
Mean		18.9	18.2	11.2
Length of Time Riding				
New Rider*		15%	**21%**	10%
1 - 2 Years		5%	11%	7%
3 - 5 Years		15%	38%	12%
5 Years or More		**64%**	30%	71%
Reliance on Transit				
All or Most		33%	**41%**	30%
Some		40%	40%	31%
Very Little		**27%**	19%	29%
Travel Times				
Peak and Off-Peak		66%	**83%**	75%
Peak Only		**20%**	8%	7%
Off-Peak Only		14%	9%	18%

Figure 36: Trends in Primary Travel Mode to Work or School (All Commuters)

Commuters' choice of travel mode to work or school has varied little over the years.

- Nearly two out of three commuters continue to drive alone to work.
- Nearly one out of five commuters uses public transportation. This is largely due to high ridership by commuters living in Seattle / N. King County.
- The percentage using Metro buses has decreased slightly as some commuters have shifted to using Sound Transit or another bus system, notably in South King County.

	2001 – 2006	2009	2011
	Seattle / N. King		
SOV	53%	50%	50%
Metro Bus	26%	26%	26%
Other Transit	1%	2%	2%
Car / Vanpool	7%	6%	7%
Other	13%	15%	15%
	South King		
SOV	71%	75%	71%
Metro Bus	12%	9%	10%
Other Transit	1%	2%	4%
Car / Vanpool	10%	10%	9%
Other	6%	4%	7%
	East King		
SOV	72%	73%	72%
Metro Bus	12%	10%	9%
Other Transit	1%	1%	2%
Car / Vanpool	9%	9%	8%
Other	6%	7%	8%



	Single Occupant Vehicle	Metro Bus	Other Transit	Carpool / Vanpool	Other
2001 - 2006	63%	18%	1%	8%	9%
2009	65%	16%	2%	8%	9%
2011	63%	16%	3%	8%	10%

Question COMM2: *How do you usually get to and from [work/school]?*
Base: *All Work or School Commuters (n_{2011} = 1,627)*
** Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2007, 2008, and 2010.*

Figure 37: Demographic Characteristics of Commuters by Primary Commute Mode

Those using Metro to commute to work are more likely than SOV commuters to be:

- Women
- Less affluent

Metro riders who drive alone to work are more likely than SOV commuters who are Non-Riders and Metro bus commuters to be:

- Men
- Affluent

	Metro Bus Commuters	SOV Commuters (Non-Riders)	SOV Commuters (Metro Riders)
Gender			
Male	53%	59%	**61%**
Female	**47%**	41%	39%
Age			
16 to 24	16%	9%	11%
25 to 34	26%	24%	28%
35 to 44	24%	23%	19%
45 to 54	17%	24%	23%
55 to 64	16%	15%	14%
65 plus	2%	5%	5%
Mean	38.9	42.0	41.0
Household Income			
Less than $35,000	**25%**	10%	14%
$35,000 to $55,000	**23%**	**20%**	14%
$55,000 to $75,000	15%	**16%**	9%
$75,000 to $100,000	14%	21%	21%
$100,000 or Greater	23%	33%	**42%**
Median	$57,537	$79,491	$90,704

Question COMM2: *How do you usually get to and from [work/school]?*
Base: *All Work or School Commuters (n_{2011} = 1,627)*

Figure 38: Transit Use by Primary Commute Mode

As would be expected, those using Metro to commute to work are more likely than Metro riders who drive along to work to:

- Be Frequent Regular Riders
- Rely on Metro for all or most of their transportation needs

As frequent riders, most ride during both peak and off-peak hours. However, a significant percentage rides during peak hours only.

Metro riders who drive alone to work are more likely than Metro bus commuters to be Infrequent Riders.

	Metro Bus Commuters	SOV Commuters (Metro Riders)
Rider Status		
Regular Riders	**89%**	29%
Infrequent Riders	5%	**71%**
Frequency of Riding		
1 to 4	5%	**71%**
5 – 7	2%	13%
8 – 10	7%	10%
11 – 20	**26%**	4%
21 or More	**59%**	2%
Mean	**30.8**	4.8
Length of Time Riding		
New Rider	13%	16%
1 – 2 Years	6%	5%
3 – 5 Years	18%	14%
5 or More Years	62%	65%
Reliance of Transit		
All or Most	**61%**	3%
Some	36%	36%
Very Little	2%	61%
Travel Times		
Peak & Off-Peak	**74%**	63%
Peak Only	**23%**	10%
Off Peak Only	3%	**27%**

Question COMM2: *How do you usually get to and from [work/school]?*
Base: *All Work or School Commuters (n_{2011} = 1,627)*

Figure 39: Trends in Commute Mode by Type of Commuter (All Commuters)

While a small segment (on average 10% of all commuters), a significant percentage of School Commuters use Metro or other transit to get to and from school.

- However, the percentage of School Commuters using Metro has been steadily decreasing. While some are now using other transit, the total percentage using transit has decreased from 35% in years prior to 2007 to 29% in 2011.
- There has been a corresponding increase in driving alone (from 28% to 31%) as well as other modes such as walking, bicycling, and motorcycles.

Two out of three Work Commuters drive alone. There has been little change in commute modes over the years in this segment.

	2001 – 2006	2009	2011
	Work Commuters		
Single Occupant Vehicle	66%	69%	67%
Metro Bus	17%	14%	15%
Other Transit	1%	2%	3%
Carpool / Vanpool	8%	7%	7%
Other	8%	8%	8%
	School Commuters		
Single Occupant Vehicle	28%	29%	31%
Metro Bus	34%	29%	26%
Other Transit	1%	0%	3%
Carpool / Vanpool	17%	20%	13%
Other	21%	22%	27%

Question COMM2: *How do you usually get to and from [work/school]?*
Base: *All Work Commuters (n_{2011} = 1,416); All School Commuters (n_{2011} = 211)*
** Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2007, 2008, and 2010.*

Figure 40: Trends in Commute Mode by Rider Status (Riders Only)

After decreasing steadily through 2010, the percentage of riders using Metro to get to and from work or school increased in 2011. Moreover, the percentage using another system has been increasing as well.

- In total 54% of all Metro riders currently use transit (Metro or another system) to get to work or school, up from 48% in 2010.

Two out of three Regular Riders use Metro to get to work.

- The total percentage of Regular Riders using transit (Metro or another system) to get to work has increased from 68% in the years before 2009 to 73% in 2011.

One out of ten Regular Riders drive alone to work.

The percentage of Infrequent Riders who drive alone to work decreased in 2011 with a corresponding increase in the percentage walking or bicycling.

	2001 – 2008	2009	2010	2011
	All Riders			
SOV	24%	28%	32%	25%
Metro Bus	50%	47%	44%	48%
Other Transit	2%	3%	4%	6%
Carpool / Vanpool	8%	7%	8%	8%
Other	15%	15%	12%	14%
	Regular Riders			
SOV	11%	10%	14%	11%
Metro Bus	66%	67%	66%	66%
Other Transit	2%	4%	4%	7%
Carpool / Vanpool	6%	4%	6%	7%
Other	15%	15%	10%	10%
	Infrequent Riders			
SOV	62%	61%	62%	55%
Metro Bus	5%	10%	7%	8%
Other Transit	1%	3%	4%	2%
Carpool / Vanpool	15%	13%	11%	11%
Other	16%	14%	16%	24%

Question COMM2: *How do you usually get to and from [work/school]?*
Base: *All Regular and Infrequent Riders (n2011 = 1,455); Regular Riders (n2011 = 1,241); Infrequent Riders (n2011 = 214)*

Figure 41: Trends in Work Locations (All Commuters)

More than one out of four commuters work or go to school in downtown Seattle (10%) and the area immediately surrounding downtown Seattle (16%).

- This figure has varied little over the years.

One out of six commuters works or goes to school in Seattle / North King County. Of these, nearly three out of ten (29%) commute to the University

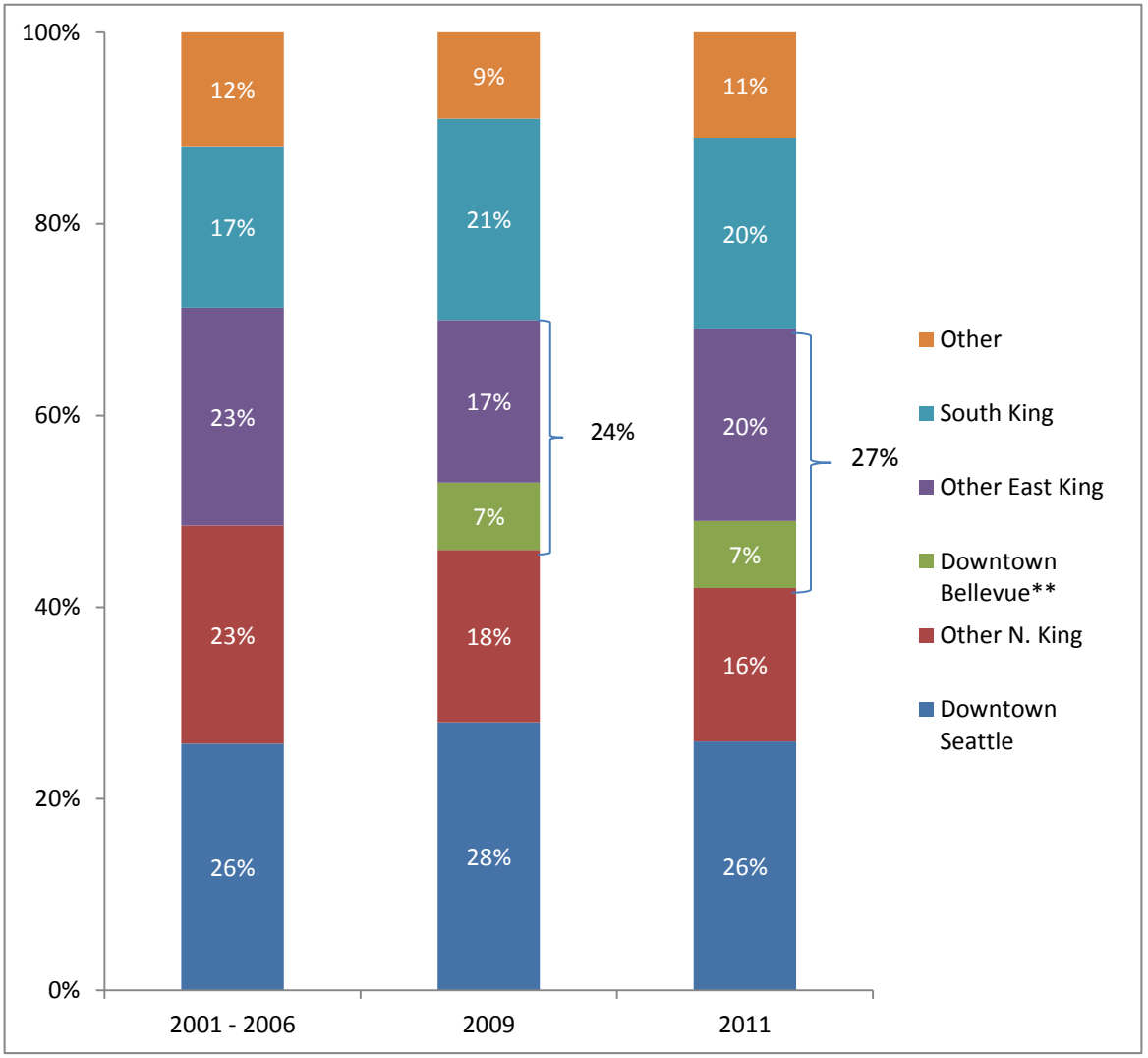
- The percentage of commuters working in other North King County locations has decreased over the past years, mostly due to decreases in those commuting to Northgate, Shoreline, and other North Seattle locations.

A greater percentage of commuters now work or go to school in East King County, making it comparable to Downtown Seattle as a destination.

- Downtown Bellevue and Eastgate are the largest contributors to that growth—33% in 2009 to 40% in 2011. Redmond has held relatively steady at 25% to 26%.
- Issaquah is less of a commute destination—4% in 2011, down from 10% in 2009.

One out of five commuters work or go to school in South King County, the same as in 2009 and up slightly from previous years.

- Renton continues to be the primary commute destination.



***Question COMM1**: In what geographic area do you [work/attend school]?*
***Base:** All Work or School Commuters (n_{2011} = 1,627)*
** Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2007, 2008, and 2010.*
*** Downtown Bellevue added as separate work location in 2009*

Figure 42: Work Location by Where Live

As in the past, the majority of commuters lives and works in the same area.

- However, the percentage living and working in the same area is down slightly from previous years. This is notable for those living in Seattle / North King County. In 2009 75% of those living in this area also work there; this figure decreased to 69% in 2011 with a corresponding increase in the percentage working in East King County and, to a lesser extent, South King County.

	Where Live		
Work / School Location	**Seattle / N. King**	**South King**	**East King**
Downtown Seattle & Surrounding Areas	**41%**	16%	18%
Other North King County	**28%**	9%	8%
East King County	15%	17%	**56%**
South King County	8%	**45%**	5%
Other	8%	13%	13%

	2001 – 2006	2009	2011
	Seattle / N. King		
Downtown Seattle & Surrounding Areas	38%	45%	41%
Other North King County	35%	30%	28%
East King County	12%	11%	15%
South King County	5%	6%	8%
Other	10%	7%	8%
	South King		
Downtown Seattle & Surrounding Areas	17%	18%	15%
Other North King County	17%	10%	9%
East King County	12%	13%	17%
South King County	40%	48%	45%
Other	14%	11%	13%
	East King		
Downtown Seattle & Surrounding Areas	16%	15%	18%
Other North King County	11%	12%	8%
East King County	58%	58%	56%
South King County	5%	6%	5%
Other	10%	10%	13%

***Question COMM1**: In what geographic area do you [work/attend school]?*
***Base:** All Work or School Commuters (n_{2011} = 1,627)*
** Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2007, 2008, and 2010.*

Figure 43: Mode Split by Work Location

More than one-third (36%) of commuters working in downtown Seattle use Metro to get to work; an additional 6 percent use another transit system. Only two out of five (40%) commuters to downtown Seattle drive alone.

- Those commuting to other North King County locations are also more likely than those commuting to downtown Bellevue, other East King County, and South King County to use Metro.

	Downtown Seattle	Other N. King	Downtown Bellevue	Other East King	South King
Drive Alone	40%	58%	66%	76%	77%
Metro Bus	**36%**	**21%**	8%	5%	6%
Other Transit	**6%**	1%	3%	1%	1%
Carpool / Vanpool	6%	5%	8%	10%	9%
Other	12%	15%	14%	8%	7%

Figure 44: Distance and Travel Time to Work (All Commuters)

Distance and travel time to work have remained stable over the years.

	2001 – 2006	2009	2011
	Distance to Work		
0 to 4 Miles	27%	26%	27%
5 to 9 Miles	26%	25%	22%
10 to 19 Miles	29%	31%	33%
20 or More Miles	19%	18%	18%
Mean	11.1	11.5	11.3
	Travel Time to Work		
0 to 10 Minutes	22%	20%	18%
11 to 15 Minutes	15%	15%	19%
16 to 30 Minutes	37%	41%	37%
31 to 45 Minutes	16%	15%	16%
> 45 Minutes	9%	9%	10%
Mean	26.4	26.5	26.9

Commuters living in Seattle / North King County have the shortest commutes both in terms of distance and travel time.

- However, on a relative basis (travel time / distance), these commuters' travel times are greater—that is, speed of travel is slower than for those living in South and East King.

	Seattle / N. King	South King	East King
	Distance to Work		
0 to 4 Miles	35%	20%	26%
5 to 9 Miles	27%	17%	20%
10 to 19 Miles	26%	36%	38%
20 or More Miles	11%	28%	17%
Mean	8.9	13.7	11.5
	Travel Time to Work		
0 to 10 Minutes	16%	19%	22%
11 to 15 Minutes	21%	20%	15%
16 to 30 Minutes	42%	30%	37%
31 to 45 Minutes	14%	18%	17%
> 45 Minutes	8%	13%	8%
Mean	25.7	28.9	26.2

While commuters using Metro have shorter trips, their travel time is significantly greater.

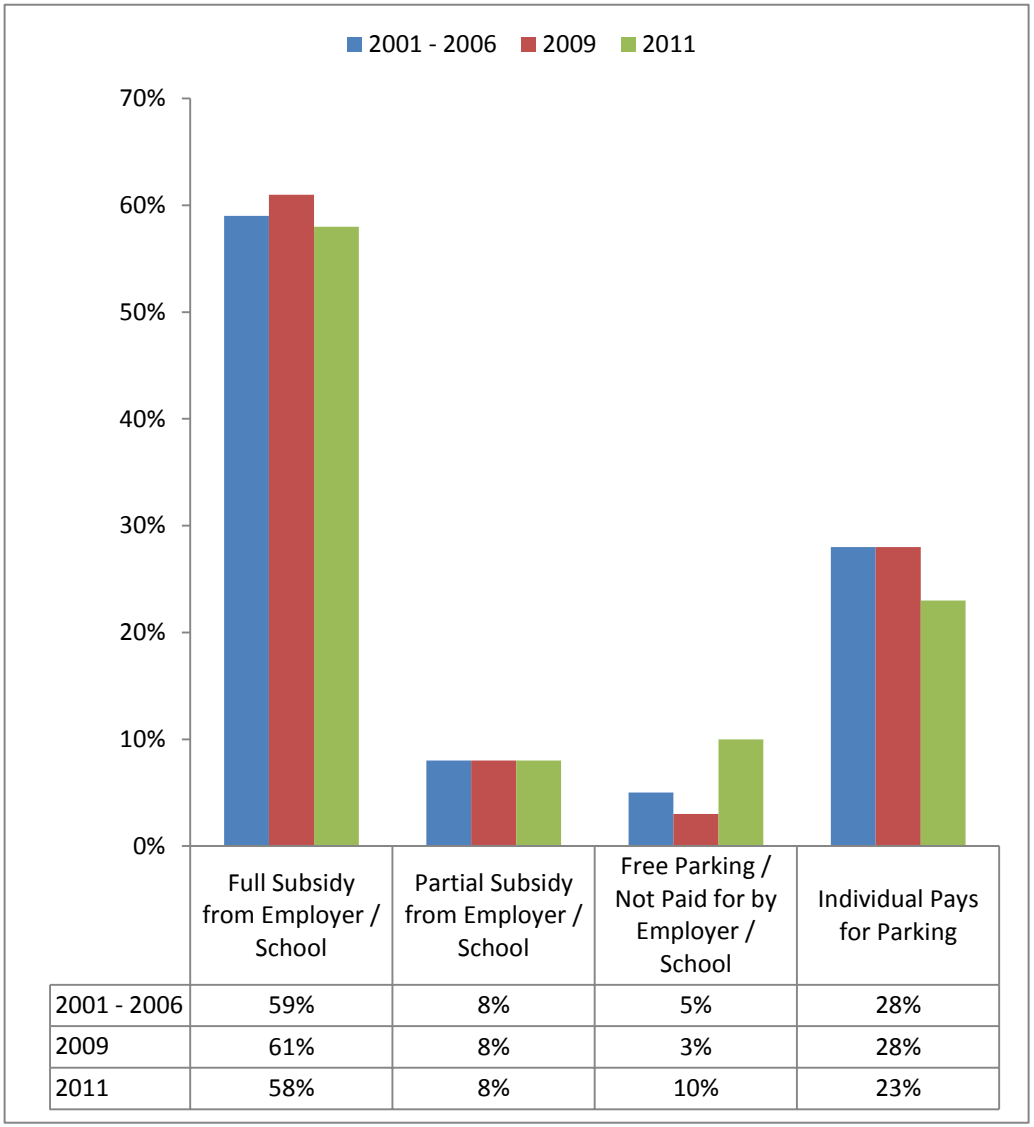
	Metro Bus	Single Occupant Vehicle
	Distance to Work	
0 to 4 Miles	25%	22%
5 to 9 Miles	31%	21%
10 to 19 Miles	28%	37%
20 or More Miles	16%	20%
Mean	10.1	12.4
	Travel Time to Work	
0 to 10 Minutes	4%	21%
11 to 15 Minutes	10%	21%
16 to 30 Minutes	35%	37%
31 to 45 Minutes	28%	14%
> 45 Minutes	23%	7%
Mean	38.6	24.6

*Question **COMM3RC**: How many miles do you travel from home to work or school one-way?*
***Question COMM3ARC**: About how long does your travel from home to (work/school) one-way take you?*
***Base:** All Work or School Commuters (n_{2011} = 1,627) * Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2007, 2008, and 2010.*

Figure 45: Trends in Parking Subsidies (All Commuters)

The extent to which commuters receive a full or partial subsidy for parking has remained relatively stable over the years.

The extent to which commuters have free parking that is not provided by their employers or school spiked in 2011. As a result, fewer commuters are paying their own way for parking.



	Full Subsidy from Employer / School	Partial Subsidy from Employer / School	Free Parking / Not Paid for by Employer / School	Individual Pays for Parking
2001 - 2006	59%	8%	5%	28%
2009	61%	8%	3%	28%
2011	58%	8%	10%	23%

***Question PARK1**: Does your employer or school offer or provide you with free or reduced fee parking at work or school?*
***Base:** All Work or School Commuters (n_{2011} = 1,627)*
** Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2007, 2008 and 2010.*

School Commuters are twice as likely as Work Commuters to pay for parking.

	2001-2006	2009	2011
	Work Commuters		
Full Subsidy from Employer	61%	64%	61%
Partial Subsidy from Employer	7%	6%	7%
Free Parking / Not Paid for by Employer	5%	3%	10%
Individual Pays for Parking	27%	27%	21%
	School Commuters		
Full Subsidy from School	33%	36%	26%
Partial Subsidy from School	19%	22%	20%
Free Parking / Not Paid for by School	3%	2%	13%
Individual Pays for Parking	45%	40%	41%

Drive alone commuters are more than twice as likely as those who use Metro to receive a full or partial subsidy for parking.

- The extent to which drive alone commuters receive full subsidies has decreased. However, they have been successful in finding alternatives. Currently, only one out of eight drive alone commuters pays for parking.

	2001-2006	2009	2011
	Drive Alone Commuters		
Full Subsidy from Employer / School	73%	74%	70%
Partial Subsidy from Employer / School	5%	4%	6%
Free Parking / Not Paid for by Employer / School	6%	3%	12%
Individual Pays for Parking	16%	18%	12%
	Metro Bus Commuters		
Full Subsidy from Employer / School	20%	19%	22%
Partial Subsidy from Employer / School	18%	16%	15%
Free Parking / Not Paid for by Employer / School	1%	0%	2%
Individual Pays for Parking	61%	66%	60%

Question PARK1*: Does your employer or school offer or provide you with free or reduced fee parking at work or school?*
Base: *All Work or School Commuters (n_{2011} = 1,627)*
** Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2007 and 2008 and 2010.*

Rider Satisfaction

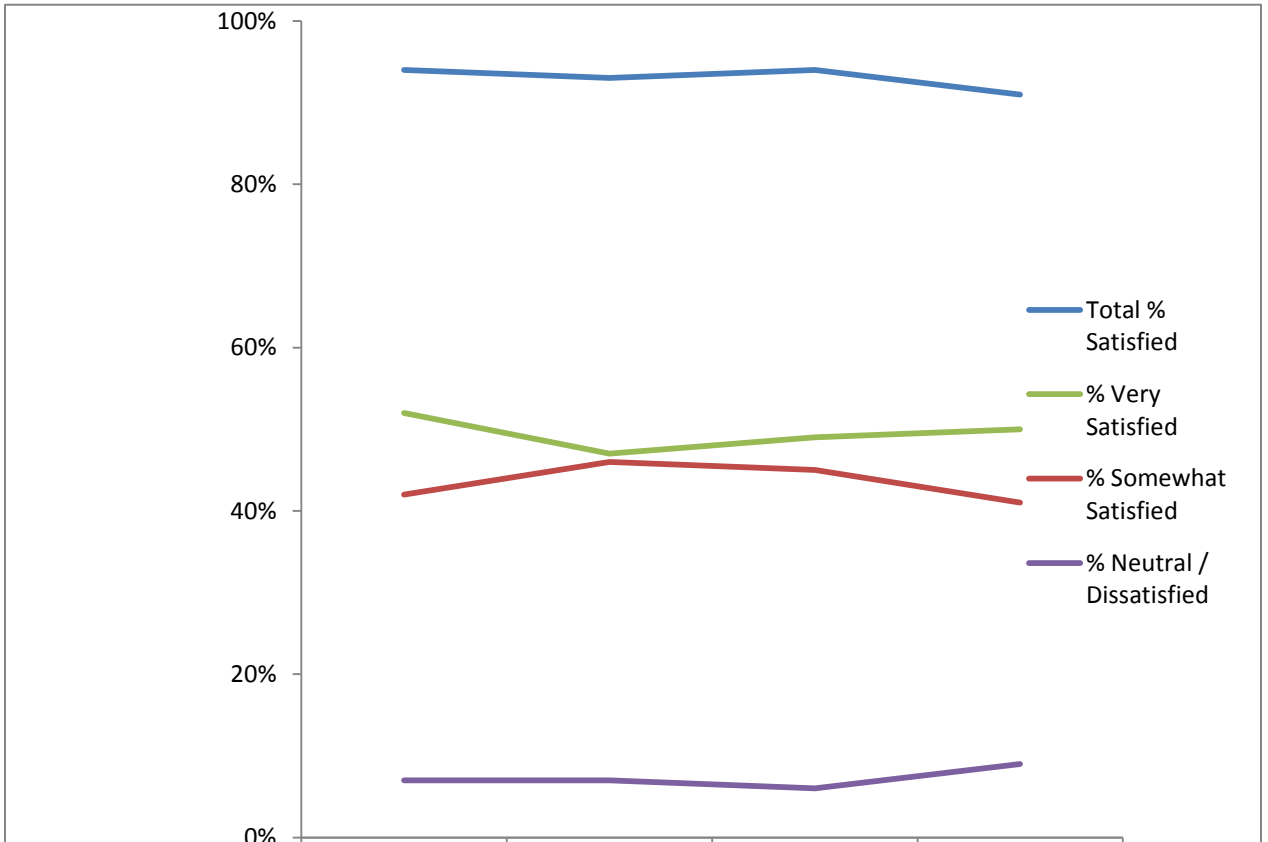
Overall

Riders (Regular and Infrequent Riders) were asked to indicate their overall satisfaction with Metro as well as their satisfaction with 29 individual elements of service. While the majority of service elements have been included each year, new questions are added to address changes to service.

	What We Found	Key Stats	What It Means
Overall Satisfaction	The vast majority of Metro riders continue to be satisfied overall with Metro. However, the percentage of satisfied Metro riders has trended down slightly from 94% in 2010 to 91% in 2011, its lowest level ever. This is due primarily to a decrease in the percentage who are somewhat satisfied with riding—from 45% to 41%. While small, the percentage of neutral or dissatisfied riders has increased significantly—from 6% to 9%. These changes can be explained in part by variations within the different rider segments. While satisfaction among Frequent Regular Riders remains high and has increased, satisfaction among Moderate Regular and Infrequent Riders has trended slightly downwards.	Total % Satisfied **91%** % Very Satisfied **50%** % Somewhat Satisfied **41%** % Neutral / Dissatisfied **9%** % Very Satisfied Frequent RR **58%** Moderate RR **45%** Infrequent Riders **42%**	This high level of satisfaction given higher ridership in recent years suggests a real opportunity to leverage “peer to peer validation” among younger people in particular, toward the objective of converting ambivalent Riders. Metro should continue to carefully monitor trends in satisfaction, while focusing on operational improvements that can improve the rider experience. Downward trend in satisfaction among Moderate Regular and Infrequent Riders may be a constraint on their ridership, which is less commute oriented than for Frequent Regular Riders. This may reflect new trips / routes taken, with experiences that do not meet expectations. It may also suggest that as this segment seeks employment, they are finding it difficult to reach hiring locations on the bus.

Figure 46: Trends in Overall Customer Satisfaction, 2001 to 2011, All Riders

- More than nine out of ten Riders are satisfied with riding Metro. Moreover, half are very satisfied.
- While not statistically significant, the percentage satisfied has trended downwards, due primarily to a decrease in the percentage who are somewhat satisfied.
- While small, the percentage who are neutral or dissatisfied increased significantly.



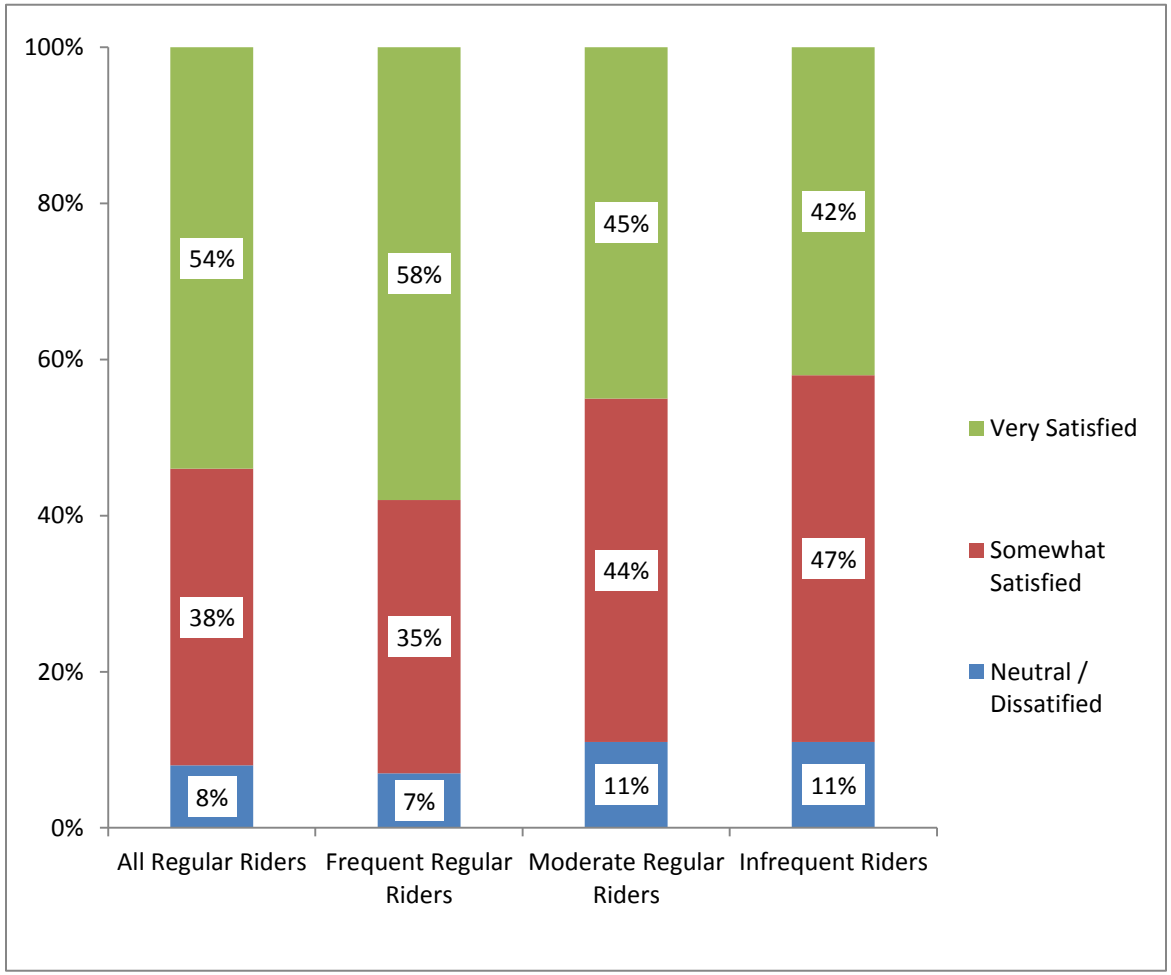
	2001 - 2008	2009	2010	2011
Total % Satisfied	94%	93%	94%	91%
% Very Satisfied	52%	47%	49%	50%
% Somewhat Satisfied	42%	46%	45%	41%
% Neutral / Dissatisfied	7%	7%	6%	9%

***Question SAT1XX**: Overall how satisfied are you with Metro Transit?*

***Base**: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 47: Differences in Overall Satisfaction by Key Customer Segments

- As in previous years, Regular Riders continue to be more likely to be very satisfied with riding Metro than Infrequent Riders.
- However, Moderate Regular Riders' satisfaction resembles Infrequent Riders' more than Frequent Regular Riders'.

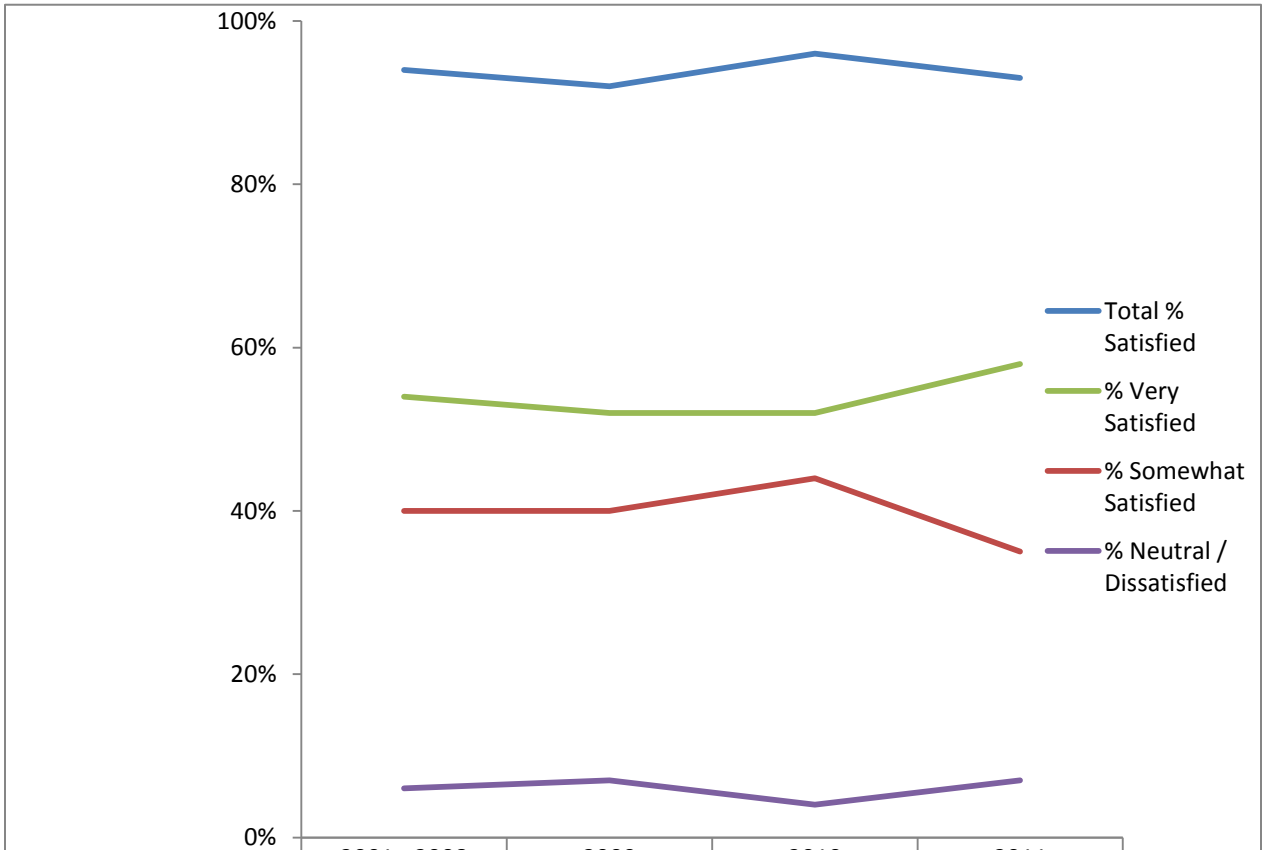


***Question SAT1XX**: Overall how satisfied are you with Metro Transit?*

***Base**: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 48: Trends in Overall Customer Satisfaction, 2001 to 2011, Frequent Regular Riders

- Among Frequent Regular Riders, the percentage who are very satisfied increased significantly and may have contributed to the increased frequency of riding within this segment.



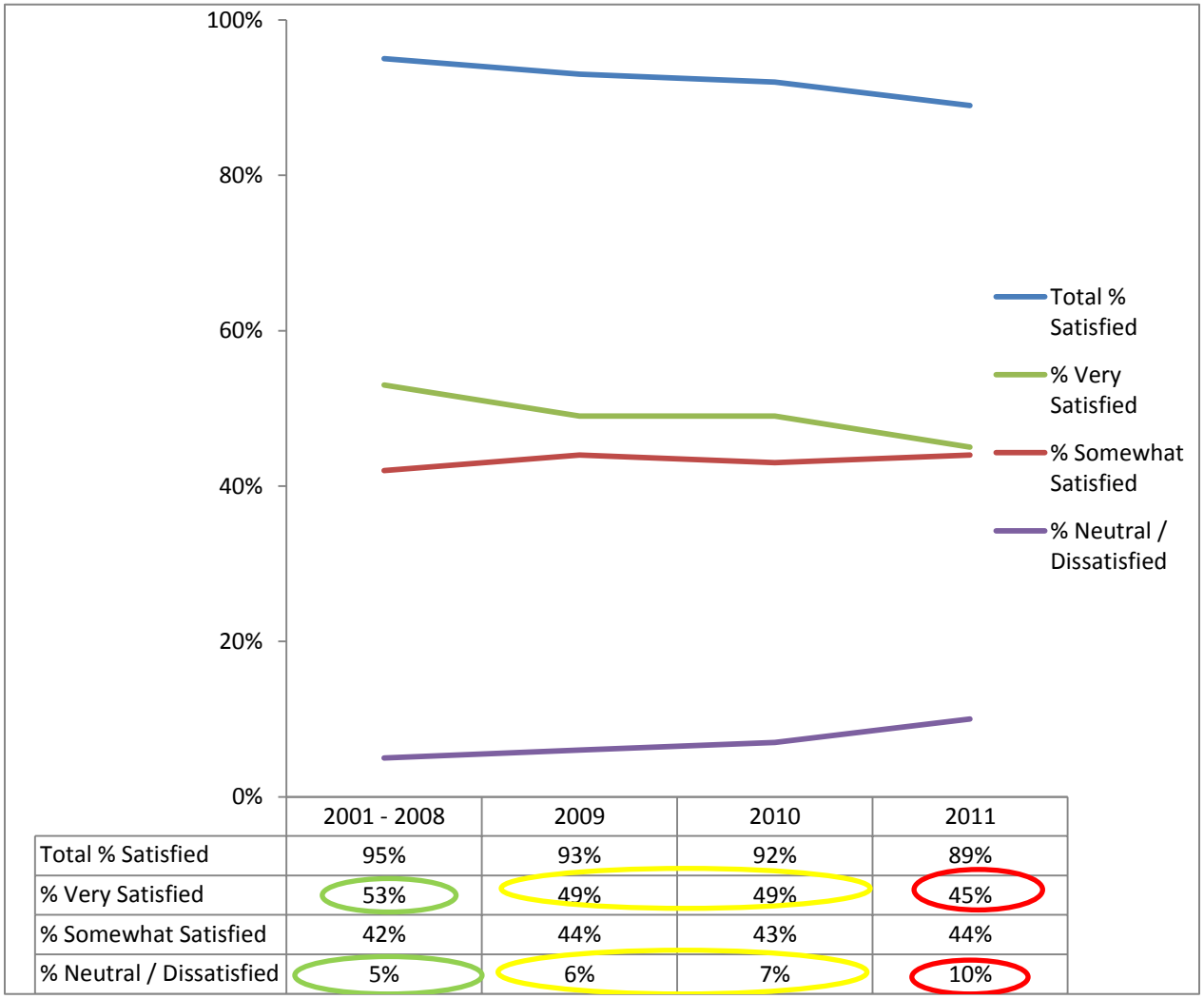
	2001 - 2008	2009	2010	2011
Total % Satisfied	94%	92%	96%	93%
% Very Satisfied	54%	52%	52%	58%
% Somewhat Satisfied	40%	40%	44%	35%
% Neutral / Dissatisfied	6%	7%	4%	7%

***Question SAT1XX**: Overall how satisfied are you with Metro Transit?*

***Base**: Frequent Regular Riders (n_{2011} = 832)*

Figure 49: Trends in Overall Customer Satisfaction, 2001 to 2011, Moderate Regular Riders

- The percentage of Moderate Regular Riders who are very satisfied has been decreasing over the years and is now at its lowest point.
- While small, the percentage that are neutral or dissatisfied has been increasing.



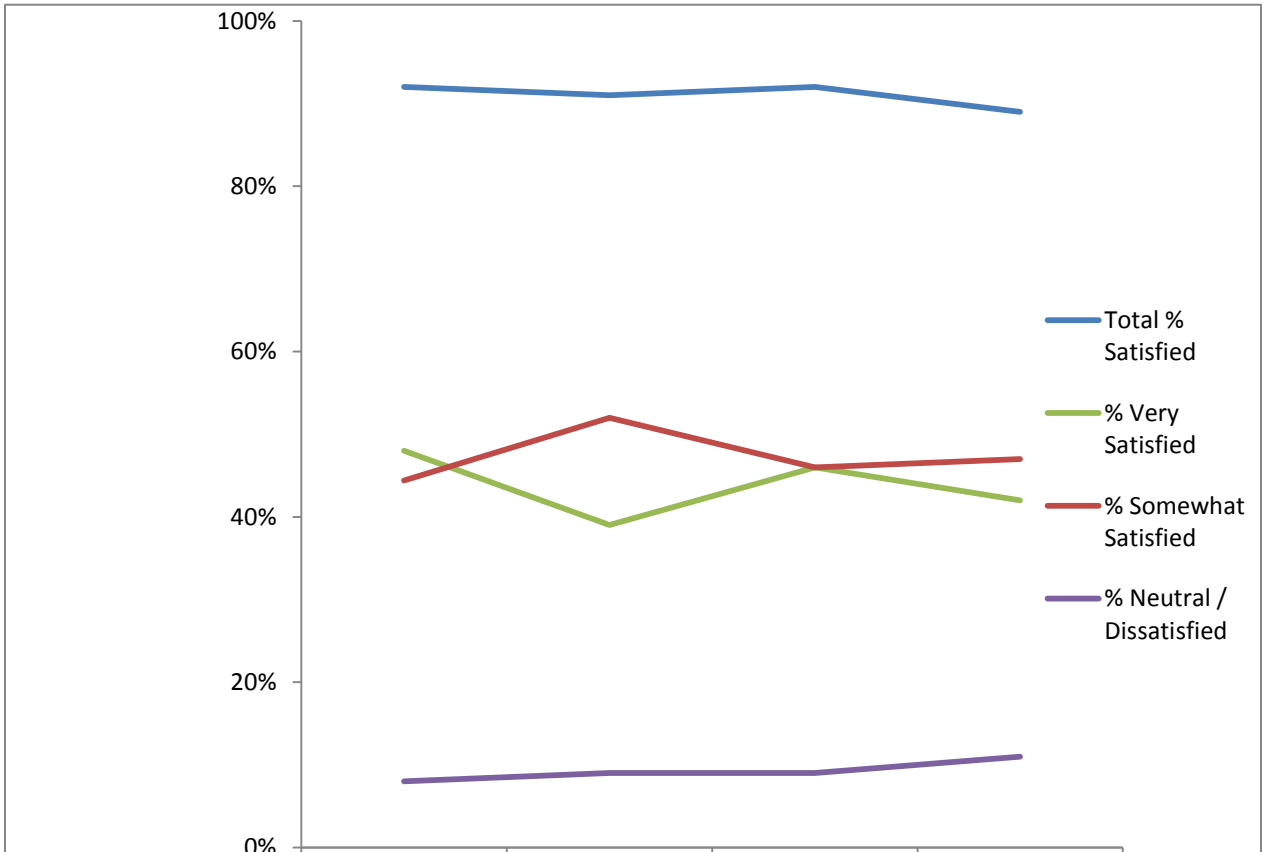
	2001 - 2008	2009	2010	2011
Total % Satisfied	95%	93%	92%	89%
% Very Satisfied	53%	49%	49%	45%
% Somewhat Satisfied	42%	44%	43%	44%
% Neutral / Dissatisfied	5%	6%	7%	10%

***Question SAT1XX**: Overall how satisfied are you with Metro Transit?*

***Base**: Moderate Regular Riders (n_{2011} = 395)*

Figure 50: Trends in Overall Customer Satisfaction, 2001 to 2011, Infrequent Riders

- Infrequent Riders' satisfaction with riding has varied over the years, due primarily to shifts in the percentage very satisfied versus somewhat satisfied.



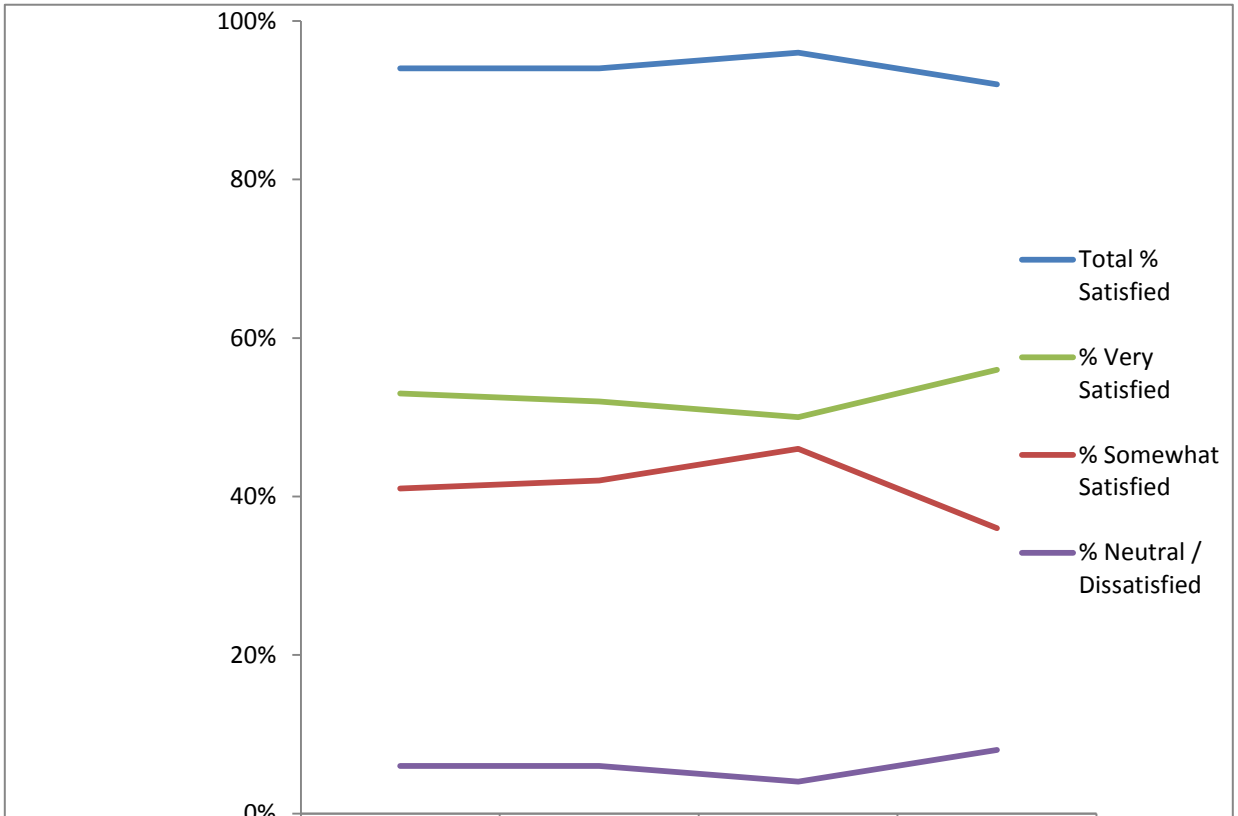
	2001 - 2008	2009	2010	2011
Total % Satisfied	92%	91%	92%	89%
% Very Satisfied	48%	39%	46%	42%
% Somewhat Satisfied	44%	52%	46%	47%
% Neutral / Dissatisfied	8%	9%	9%	11%

***Question SAT1XX**: Overall how satisfied are you with Metro Transit?*

***Base**: All Infrequent Riders (n_{2011} = 214)*

Figure 51: Trends in Overall Customer Satisfaction, 2001 to 2011, Metro Bus Commuters

- As would be expected due to the extent to which Metro bus commuters are also Metro's Frequent Regular Riders, the percentage who are very satisfied increased significantly between 2010 and 2011, halting the slight drop from previous years.
- There has been a decrease in the percentage who are somewhat satisfied, corresponding to the increase in the percentage who are very satisfied but also the increase in those who are neutral or dissatisfied.



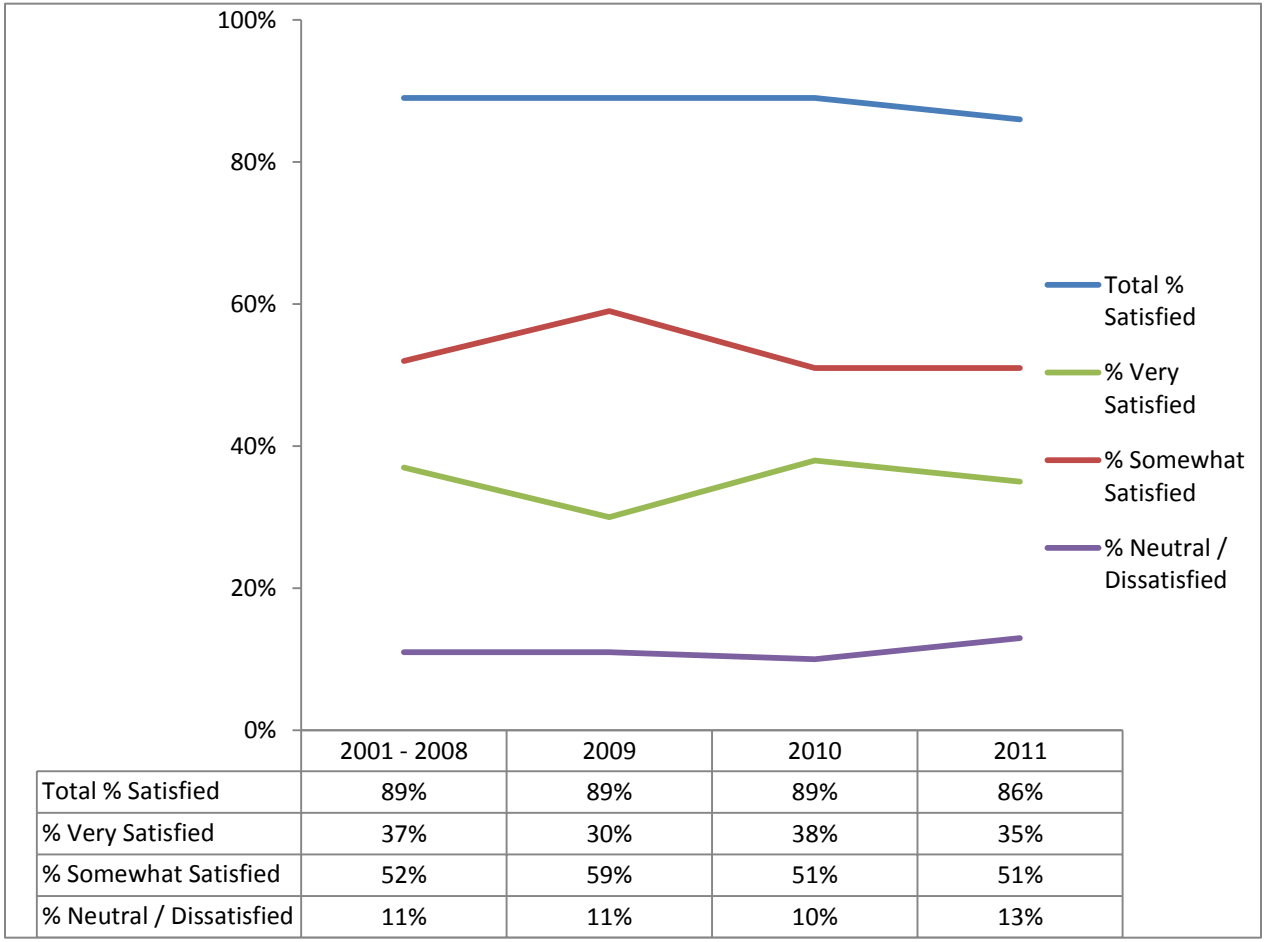
	2001 - 2008	2009	2010	2011
Total % Satisfied	94%	94%	96%	92%
% Very Satisfied	53%	52%	50%	56%
% Somewhat Satisfied	41%	42%	46%	36%
% Neutral / Dissatisfied	6%	6%	4%	8%

***Question SAT1XX**: Overall how satisfied are you with Metro Transit?*

***Base**: All Metro Bus Commuters (n_{2011} = 636)*

Figure 52: Trends in Overall Customer Satisfaction, 2001 to 2011, Metro Riders who Drive Alone to Work

- Satisfaction among Metro riders who drive alone to work is significantly lower than for those who commute by Metro—86% compared to 92%, respectively. This is due primarily to a significant decrease in the percentage who are very satisfied—35% for those who drive alone compared to 56% of those who use Metro.
- While not statistically significant, overall satisfaction with Metro service decreased slightly with a corresponding increase in the percentage neutral or dissatisfied.



	2001 - 2008	2009	2010	2011
Total % Satisfied	89%	89%	89%	86%
% Very Satisfied	37%	30%	38%	35%
% Somewhat Satisfied	52%	59%	51%	51%
% Neutral / Dissatisfied	11%	11%	10%	13%

***Question SAT1XX**: Overall how satisfied are you with Metro Transit?*

***Base**: Metro Riders who Drive Alone to Work (n_{2011} = 160)*

Rider Satisfaction— Highest Rated Transit Elements

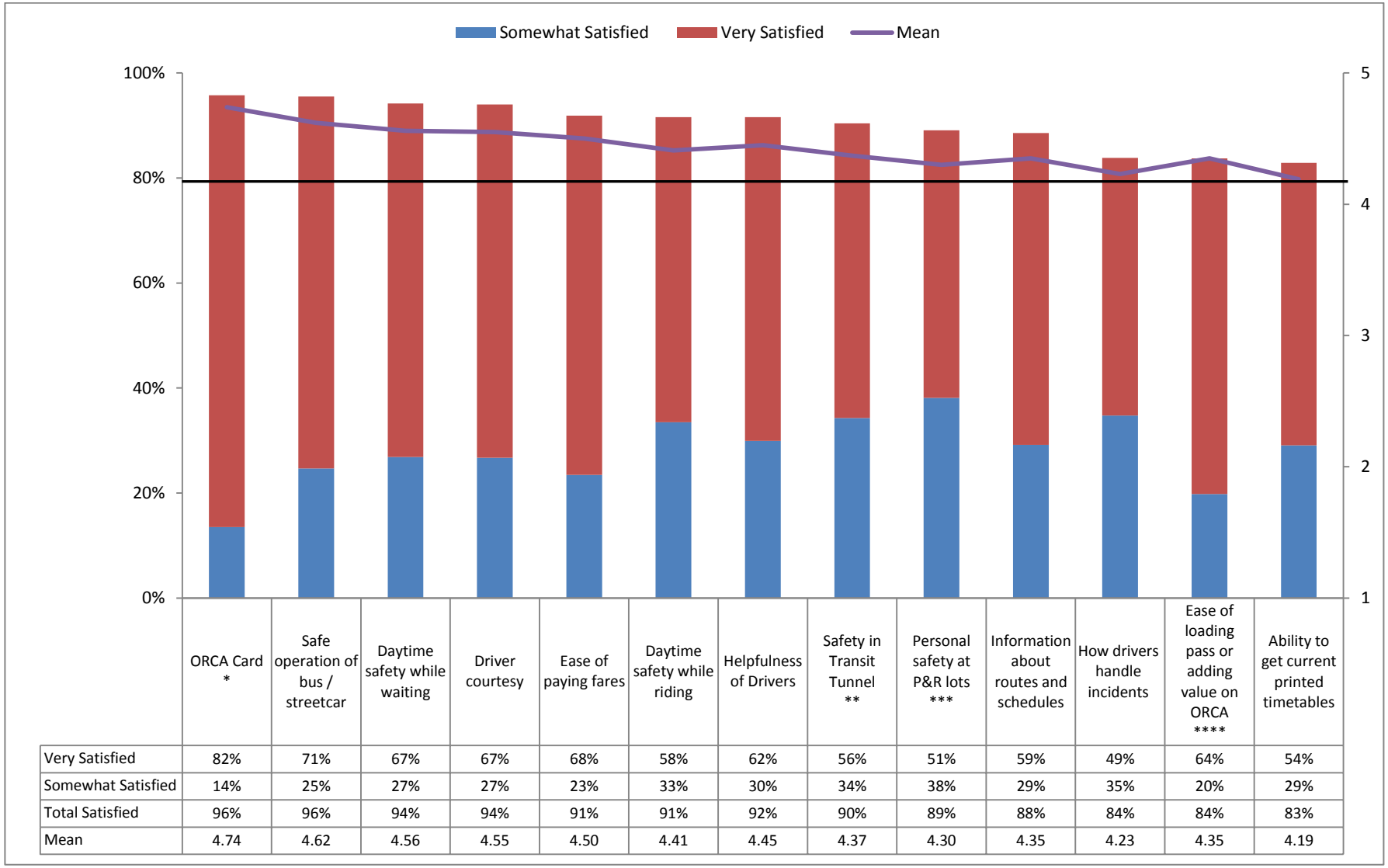
In addition to providing an overall satisfaction rating, Regular and Infrequent Riders provided feedback as to their satisfaction with 29 individual elements of service.

Riders are generally satisfied with all elements of service. At least 64% of all Riders are satisfied with all elements of service and mean ratings are 3.49 and higher, well above the scale mid-point).

	What We Found	Key Stats	What It Means
Top Performing Elements of Service	Highest-rated transit elements are those that receive an above-average or higher (mean) satisfaction rating of 4.14 on a 5-point scale where "5" means "very satisfied" and "1" means "very dissatisfied"). The top performing elements are: ORCA Cards, safe bus operation, daytime personal safety, drivers, and customer information.	% Total Satisfied >= **83%** % Very Satisfied >= **49%** **Overall Mean** >= **4.19**	A "convenience" story, with safety and courtesy as its foundation, may attract less frequent riders to try routes or trips they have not yet experienced.
ORCA Card	The ORCA Card program has been a real success, with Metro customers giving high ratings to all aspects of fare payment. At the same time, overall satisfaction with ease of paying fares decreased somewhat—from 94% in 2010 to 91% in 2011.	ORCA Card **96%** Total Satisfied Ease of Paying Fares **91%** Total Satisfied Ease of Loading Passes / Value **84%** Total Satisfied	The decrease in satisfaction with ease of paying fares may reflect crowded buses and greater enforcement as much as the payment system itself as well as moving U-Pass holders to the ORCA Card.
Drivers	Metro drivers are also strengths, receiving consistently high ratings for courtesy and helpfulness. Satisfaction with the way in which drivers handle problems on the bus increased significantly—from 78% in 2010 to 84% in 2011.	Drivers' Courtesy **92%** Total Satisfied Drivers' Helpfulness **92%** Total Satisfied Handling Problems **84%** Total Satisfied	Metro should make drivers aware of these high ratings and continue to encourage them to deliver high quality and professional service to all customers.

	What We Found	Key Stats	What It Means
Safe Bus Operations / Daytime Personal Safety	Metro also receives high satisfaction ratings for several aspects of safety including safe bus operation and daytime safety while riding and while waiting. Satisfaction with personal safety in the downtown transit tunnel increased significantly—from 81% in 2010 to 90% in 2011.	Safe Operation **96%** Total Satisfied Daytime Safety While Waiting **94%** Total Satisfied Daytime Safety While Riding **91%** Total Satisfied Safety in Transit Tunnel **90%** Total Satisfied Safety at P&R Lots **89%** Total Satisfied	Given the importance of safety, Metro should continue its efforts in this area. It is clear that changes to policies following several well-publicized incidents in the tunnel have been successful.
Customer Information	Finally, customers are generally satisfied with the traditional information Metro provides—routes / schedule information and printed timetables. However, satisfaction with these elements has decreased over the past several years as electronic communication has largely superseded printed schedules. Satisfaction with the ability to get information on routes and schedules decreased from a high of 92% in 2009 to 88% in 2011. Satisfaction with the availability of printed timetables decreased from 91% in 2009 to 83% in 2011. Moreover, it is lower for Infrequent and Moderate Regular Riders than for Frequent Regular Riders.	Route & Schedule Information **88%** Total Satisfied Availability of Printed Timetables **83%** Total Satisfied	The decrease in satisfaction with customer information reflects Metro's efforts to reduce costs and use digital media to reach and communicate with customers. Obviously, it is easier to issue alerts and update online, leaving printed materials at somewhat of a disadvantage, which is then noted by their users. Moreover, difficulties in getting off-line information may be a deterrent to riding more often as it may be difficult to get information about trips, notably incremental trips to locations that riders are less familiar with.

Figure 53: Satisfaction with Highest Scoring Elements of Transit Service



	ORCA Card *	Safe operation of bus / streetcar	Daytime safety while waiting	Driver courtesy	Ease of paying fares	Daytime safety while riding	Helpfulness of Drivers	Safety in Transit Tunnel **	Personal safety at P&R lots ***	Information about routes and schedules	How drivers handle incidents	Ease of loading pass or adding value on ORCA ****	Ability to get current printed timetables
Very Satisfied	82%	71%	67%	67%	68%	58%	62%	56%	51%	59%	49%	64%	54%
Somewhat Satisfied	14%	25%	27%	27%	23%	33%	30%	34%	38%	29%	35%	20%	29%
Total Satisfied	96%	96%	94%	94%	91%	91%	92%	90%	89%	88%	84%	84%	83%
Mean	4.74	4.62	4.56	4.55	4.50	4.41	4.45	4.37	4.30	4.35	4.23	4.35	4.19

***Question SAT1A–SAT1CC**: How satisfied are you with …? (5 = Very Satisfied, 1 = Very Dissatisfied)*
Base:** All Regular and Infrequent Riders (n_{2011} = 1,455); * Asked only of ORCA Card Users (except U-Pass) (n=931); ** Asked of All Riders who use Downtown Transit Tunnel (n=833); *** Asked only of All Riders who have used a park-and-ride lot in past year (n=702); * Asked only of All Riders who have a Regional Transit Pass, an Agency Specific Pass, or e-Purse (n =548)*
Black line indicates overall mean (4.19) for all service elements.

Figure 54: Satisfaction with Fare Payment Service Elements

Riders continue to be very satisfied (90% or higher) with the ORCA Card as well as the ease of paying fares. They are somewhat less satisfied with the ease of loading a pass or adding value to their ORCA Card.

- While still rated highly, satisfaction with ease of paying fares decreased in 2011. The percentage very satisfied decreased from 72% to 68%. In addition, users are less satisfied with the ease of loading value to an E-purse or a pass on the ORCA Card.

ORCA Card users are the most satisfied with ease of paying fares. Cash payers are the least satisfied.

	Satisfaction with Ease of Paying Fares		
	ORCA Card Users	**U-Pass**	**Cash Payers**
Total Satisfied	**95%**	88%	87%
Very Satisfied	**76%**	67%	55%
Somewhat Satisfied	19%	21%	32%
Neutral / Dissatisfied	5%	**12%**	**13%**

	All Riders		
	2009	**2010**	**2011**
	ORCA Card*		
Total Satisfied	91%	96%	96%
Very Satisfied	65%	80%	82%
Somewhat Satisfied	26%	16%	14%
	Ease of Paying Fares		
Total Satisfied	n.a.	94%	91%↓
Very Satisfied		72%	68%↓
Somewhat Satisfied		22%	23%
	Ease of Loading Pass / Adding Value to E-purse**		
Total Satisfied	n.a.	n.a.	84%
Very Satisfied			64%
Somewhat Satisfied			20%

Question SAT1A–SAT1CC: *How satisfied are you with …?*
*Base: All Regular and Infrequent Riders (n_{2011} = 1,455); * Asked only of ORCA Card Users (except U-Pass) (n=931); ** Asked only of All Riders who have a Regional Transit Pass, an Agency Specific Pass, or e-Purse (n =548)*

Figure 55: Satisfaction with Safe Bus Operations and Daytime Personal Safety

Riders are also generally satisfied with:

- Safe bus operations
- Daytime personal safety while riding and waiting
- Personal safety at park-and-ride lots.
- Rider satisfaction with safety in the transit tunnel increased significantly since 2010, reflecting Metro's focus on security following 2010 incidents.

	2001 - 2008	2009	2010	2011
	Safe Bus Operation			
Total Satisfied	95%	95%	95%	96%
Very Satisfied	71%	69%	71%	71%
Somewhat Satisfied	24%	26%	24%	25%
	Daytime Personal Safety—Waiting			
Total Satisfied	97%	96%	96%	94%
Very Satisfied	73%	68%	70%	67%
Somewhat Satisfied	24%	28%	26%	27%
	Daytime Personal Safety—Riding			
Total Satisfied	92%	92%	91%	91%
Very Satisfied	59%	54%	54%	58%
Somewhat Satisfied	33%	38%	37%	33%
	Safety in Downtown Transit Tunnel*			
Total Satisfied	n.a.		81%	90%↑
Very Satisfied			46%	56%↑
Somewhat Satisfied			35%	34%
	Personal Safety at Park & Ride Lots**			
Total Satisfied	89%	91%	92%	89%
Very Satisfied	51%	53%	56%	51%
Somewhat Satisfied	38%	38%	36%	38%

Question SAT1A–SAT1CC: *How satisfied are you with …?*
*Base: All Regular and Infrequent Riders (n_{2011} = 1,455); * Asked of All Riders who use Downtown Transit Tunnel (n=833); ** Asked only of All Riders who have used a park-and-ride lot in past year (n=702);*

Figure 56: Satisfaction with Drivers

Satisfaction with the courtesy and helpfulness of Metro drivers is high and has remained high over the years.

There are no significant differences in satisfaction with Metro drivers among the different rider segments.

	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
	Driver Courtesy		
Total Satisfied	93%	94%	95%
Very Satisfied	68%	65%	67%
Somewhat Satisfied	25%	29%	28%
	Helpfulness of Drivers		
Total Satisfied	94%	90%	90%
Very Satisfied	61%	62%	62%
Somewhat Satisfied	33%	28%	28%

	All Riders		
	2009	2010	2011
	Driver Courtesy		
Total Satisfied	94%	95%	94%
Very Satisfied	64%	66%	67%
Somewhat Satisfied	30%	29%	27%
	Helpfulness of Drivers		
Total Satisfied	89%	91%	92%
Very Satisfied	56%	59%	62%
Somewhat Satisfied	33%	32%	30%
	Drivers' Handling of Incidents on Bus		
Total Satisfied	n.a.	78%	84%↑
Very Satisfied		46%	49%
Somewhat Satisfied		32%	35%

Question SAT1A–SAT1CC: *How satisfied are you with …?*
Base: All Regular and Infrequent Riders (n_{2011} = 1,455)

Figure 57: Satisfaction with Information

Riders are generally satisfied with their ability to get traditional information—routes and schedule information and printed information.

However, rider satisfaction with these elements of service has decreased over the past several years.

The percentage very satisfied with these two elements of service is significantly lower for Infrequent Riders. It is also lower for Moderate Regular Riders than Frequent Regular Riders.

	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
	Ability to Get Information on Routes & Schedules		
Total Satisfied	89%	89%	88%
Very Satisfied	**64%**	59%	54%
Somewhat Satisfied	25%	**30%**	**34%**
	Ability to Get Printed Timetables		
Total Satisfied	84%	83%	81%
Very Satisfied	**57%**	52%	50%
Somewhat Satisfied	27%	**31%**	**31%**

	All Riders		
	2009	2010	2011
	Ability to Get Information on Routes & Schedules		
Total Satisfied	92%	91%	88%
Very Satisfied	64%	62%	59%
Somewhat Satisfied	28%	29%	29%
	Ability to Get Printed Timetables		
Total Satisfied	92%	85%↓	83%
Very Satisfied	67%	55%	54%
Somewhat Satisfied	25%	30%	29%

Question SAT1A–SAT1CC: *How satisfied are you with …?*
Base: All Regular and Infrequent Riders (n_{2011} = 1,455)

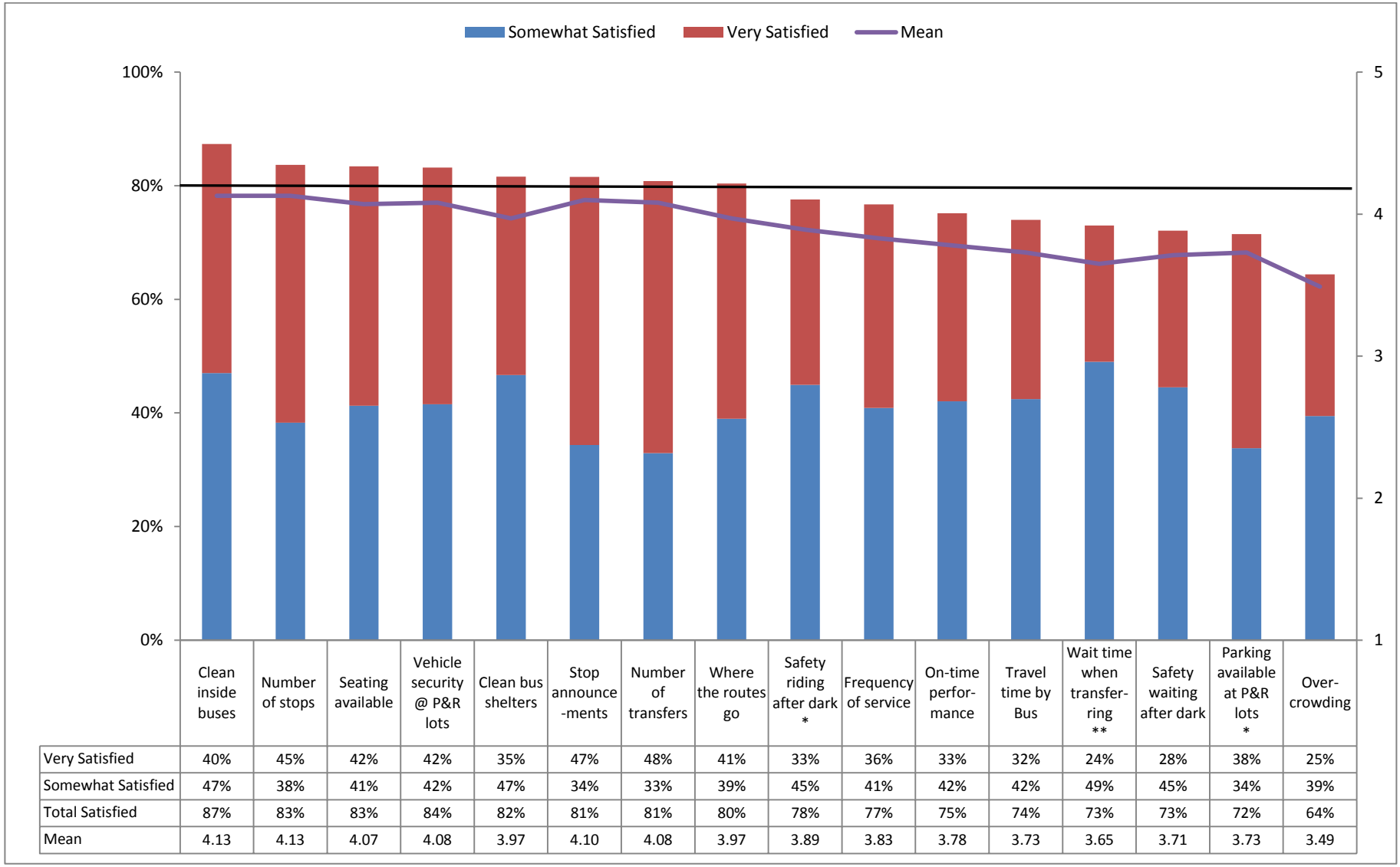
Rider Satisfaction— Lowest Rated Transit Elements

While still achieving ratings well above the mid-point on the satisfaction scale use, those considered to be the lowest-rated transit elements are those that receive a below-average mean satisfaction rating (below 4.14 on a 5-point scale where "5" means "very satisfied" and "1" means "very dissatisfied").

	What We Found	Key Stats	What It Means
Lower Performing Elements of Service	Even among lower-scoring elements, discussed below, satisfaction is still relatively high—no less than 65 percent satisfied and no less than 25 percent very satisfied—and has been relatively stable over the years. The lowest-rated elements of service include safety after dark, park-and-ride lots, comfort when riding, levels of service, transferring, and stop announcements.	Total Satisfied >= **65%** Very Satisfied >= **25%** Mean >= **3.49**	Metro should focus its efforts on the most important elements of service that receive these lower-than-average ratings. Subsequent Key Drivers Analysis identifies which elements of service are most important.
Safety After Dark	Despite generally high ratings for safety, safety while riding or waiting for the bus after dark continues as a lower performing element of service. Safety while waiting is a greater problem than safety while riding. However, safety while riding is a greater problem in Seattle / N. King County than other areas.	Safety Riding when Dark **78%** Total Satisfied Safety Waiting when Dark **73%** Total Satisfied	The perception of nighttime is likely to be neighborhood-specific and, to some extent, beyond Metro's control. The somewhat more negative perceptions among Seattle / North King County riders most likely reflects their higher ridership and the fact that they may be more likely to ride in the evenings or very early mornings. Those living in South and East King County may avoid riding when it is dark.
Park-and-Ride Lots	Satisfaction ratings are lower than average for parking availability and, to a lesser extent, security of their vehicles at park-and-ride lots. The problems are greatest in Seattle / N. King County.	Vehicle Security **84%** Total Satisfied Parking Availability **72%** Total Satisfied	Problems with park-and-ride lots are likely to be lot specific. Data is available to identify where to target resources for safety (e.g., cameras or increased patrols). Working with local jurisdictions to improve access by walkers and bicyclists could decrease vehicle use and free up parking.

	What We Found	Key Stats	What It Means
Comfort While Riding	Crowding, availability of seating, bus shelter cleanliness and inside cleanliness also receive below the overall average ratings. Overcrowding continues to be a greater potential problem area than availability of seats; at a certain point, when a bus is standing room only, seats are really not the core issue.	Inside Cleanliness **87%** Total Satisfied Availability of Seats **83%** Total Satisfied Bus Shelter Cleanliness **82%** Total Satisfied Overcrowding **64%** Total Satisfied	Perceptions of cleanliness and close proximity to other people can contribute to customers' perceptions of safety and general feelings of comfort. Some transit systems have used on-bus communications regarding "rules for riding" to encourage riders to take more responsibility for bus cleanliness and courteous behaviors.
Levels of Service / Delivery	On-time performance, trip length, frequency of service, and whether service is available to where customers need to go all receive lower-than-average ratings. Ratings for on-time performance have been decreasing year over year—from 82% prior to 2009 to 77% in 2011. Satisfaction with on-time performance is significantly lower among Seattle / N. King County riders, Metro's core market (72%).	Number of Stops **83%** Total Satisfied Where Routes Go **80%** Frequency of Service **77%** Total Satisfied On-Time Performance **75%** Total Satisfied Travel Time by Bus **74%**	Lower satisfaction levels with on-time performance and travel time by bus in Seattle / North King County reflects more frequent stops, traffic that can constrain on-time arrivals and time spent in accommodating less mobile passengers. The introduction of new Rapid Ride service in this area may alleviate some of this pressure.
Transferring	While the number of transfers and wait time when transferring receive below-average ratings, wait time is a greater problem for all riders. Infrequent and Moderate Regular Riders express greater dissatisfaction with the number of transfers.	Number of Transfers 80% Total Satisfied Wait Time 73% Total Satisfied	Lack of direct service is a deterrent for Infrequent and Moderate Regular Riders.
Announcing Stops	Consistency of stop announcements receives lower-than-average ratings, suggesting variability in terms of the number of stops announced and the clarity/volume of such announcements.	Stop Announcements 81% Total Satisfied	Additional driver training on the importance of this customer service attribute as well as incentives for consistency should be considered. Continued automation will also alleviate the problem.

Figure 58: Satisfaction with Lowest Scoring Elements of Transit Service



	Clean inside buses	Number of stops	Seating available	Vehicle security @ P&R lots	Clean bus shelters	Stop announce-ments	Number of transfers	Where the routes go	Safety riding after dark *	Frequency of service	On-time perfor-mance	Travel time by Bus	Wait time when transfer-ring **	Safety waiting after dark	Parking available at P&R lots *	Over-crowding
Very Satisfied	40%	45%	42%	42%	35%	47%	48%	41%	33%	36%	33%	32%	24%	28%	38%	25%
Somewhat Satisfied	47%	38%	41%	42%	47%	34%	33%	39%	45%	41%	42%	42%	49%	45%	34%	39%
Total Satisfied	87%	83%	83%	84%	82%	81%	81%	80%	78%	77%	75%	74%	73%	73%	72%	64%
Mean	4.13	4.13	4.07	4.08	3.97	4.10	4.08	3.97	3.89	3.83	3.78	3.73	3.65	3.71	3.73	3.49

***Question SAT1A–SAT1CC**: How satisfied are you with …? (5 = Very Satisfied, 1 = Very Dissatisfied)*
***Base:** All Regular and Infrequent Riders (n_{2011} = 1,455); * Asked only of Regular and Infrequent Riders who use park-and-ride lots to park car and rider bus/train (n = 531); ** Asked only of Regular and Infrequent Riders who transfer (n = 717)*
Black line indicates overall mean (4.19) for all service elements.

Figure 59: Satisfaction with Nighttime Safety

While satisfaction with nighttime safety remains one of the lower-than-average rated elements of service, satisfaction increased in 2009 and has remained stable since that time. Safety while waiting is a greater problem than safety while riding.

Concerns with nighttime safety while riding vary significantly by area.

- East King County Riders are the most likely to suggest they are "very satisfied" with nighttime safety while riding, followed by South King County Riders. This has held true over the years.

	Seattle / N. King	South King	East King
	Nighttime Safety Riding		
Total Satisfied	76%	75%	83%
Very Satisfied	28%	**35%**	**45%**
Somewhat Satisfied	48%	40%	38%
Neutral / Dissatisfied	23%	25%	17%

***Question SAT1A–SAT1CC**: How satisfied are you with …?*
***Base:** All Regular and Infrequent Riders (n_{2011} = 1,455)*

	2001 - 2008	2009	2010	2011
	Nighttime Safety Riding			
Total Satisfied	69%	76%	77%	78%
Very Satisfied	31%	31%	31%	33%
Somewhat Satisfied	38%	45%	46%	45%
Neutral / Dissatisfied	32%	24%	23%	22%
	Nighttime Safety Waiting			
Total Satisfied	65%	71%	72%	73%
Very Satisfied	25%	25%	29%	28%
Somewhat Satisfied	40%	46%	43%	45%
Neutral / Dissatisfied	35%	29%	27%	28%

Figure 60: Satisfaction with Park-and-Ride Lots

While satisfied with personal safety at park-and-ride lots, customers are less satisfied with the security of their vehicle and the availability of parking.

- Satisfaction with the availability of parking at park-and-ride lots has decreased significantly. The percentage satisfied decreased from 80% to 71%; while the percentage dissatisfied increased from 17% to 26%.
  - Parking availability is a somewhat greater problem in Seattle / North King County; however this difference is not statistically significant.
- Satisfaction with safety of vehicles at park-and-ride lots has varied over the years, but the differences are not statistically significant.
  - Safety of vehicles at park-and-ride lots appears to be primarily an issue for those living and most likely parking at lots in Seattle / North King County.

	2001 - 2008	2009	2010	2011
	Availablity of Parking*			
Total Satisfied	76%	**83%**	**79%**	72%↓
Very Satisfied	48%	**48%**	**51%**	38%↓
Somewhat Satisfied	28%	35%	28%	34%
Neutral / Dissatisfied	24%	17%	20%	**29%**↑
	Vehicle Security*			
Total Satisfied	81%	82%	88%	84%
Very Satisfied	38%	33%	42%	42%
Somewhat Satisfied	43%	49%	46%	42%
Neutral / Dissatisfied	29%	18%	13%	17%

	Seattle / N. King	South King	East King
	Availablity of Parking*		
Total Satisfied	67%	74%	74%
Very Satisfied	34%	44%	36%
Somewhat Satisfied	33%	30%	38%
Neutral / Dissatisfied	33%	26%	26%
	Vehicle Secuity*		
Total Satisfied	73%	**87%**	**88%**
Very Satisfied	35%	44%	**45%**
Somewhat Satisfied	**38%**	43%	43%
Neutral / Dissatisfied	**27%**	12%	12%

***Question SAT1A–SAT1CC**: How satisfied are you with …?*
***Base:** All Regular and Infrequent Riders (n_{2011} = 1,455); * Asked only of Regular and Infrequent Riders who use park-and-ride lots to park car and rider bus/train (n = 531);*

Figure 61: Satisfaction with Comfort

Riders continue to be least satisfied with overcrowding on Metro buses and streetcars. Moreover, overcrowding *per se* (because it affects comfort in more than one way) continues to be a greater problem than availability of seats.

- Frequent Regular Riders are more likely than Moderate Regular and Infrequent Riders to say they are dissatisfied with crowding and availability of seats on the buses.

	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
	Overcrowding		
Total Satisfied	57%	**70%**	**71%**
Very Satisfied	19%	29%	30%
Somewhat Satisfied	38%	41%	41%
Neutral / Dissatisfied	**43%**	30%	30%
	Availability of Seats		
Total Satisfied	79%	88%	86%
Very Satisfied	36%	**50%**	45%
Somewhat Satisfied	43%	38%	41%
Neutral / Dissatisfied	**21%**	12%	14%

	2001 - 2008	2009	2010	2011
	Inside Cleanliness of Buses			
Total Satisfied	89%	87%	91%	87%
Very Satisfied	46%	41%	40%	40%
Somewhat Satisfied	43%	46%	51%	47%
Neutral / Dissatisfied	11%	13%	10%	13%
	Availability of Seating			
Total Satisfied	85%	84%	87%	83%
Very Satisfied	46%	40%	42%	42%
Somewhat Satisfied	39%	44%	45%	41%
Neutral / Dissatisfied	14%	15%	13%	17%
	Cleanliness of Bus Shelters			
Total Satisfied	77%	80%	84%	82%
Very Satisfied	33%	34%	34%	35%
Somewhat Satisfied	44%	46%	50%	47%
Neutral / Dissatisfied	23%	20%	16%	18%
	Overcrowding			
Total Satisfied	n.a.	67%	68%	64%
Very Satisfied		24%	23%	25%
Somewhat Satisfied		43%	**45%**	39%
Neutral / Dissatisfied		33%	**33%**	36%

***Question SAT1A–SAT1CC**: How satisfied are you with …?*
***Base:** All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 62: Satisfaction with Levels of Service

As in previous years, customer satisfaction with system performance and levels of service—on-time performance, frequency and availability of service—receive lower than the overall average satisfaction ratings.

- Rider satisfaction with on-time performance has been declining over the years—from 82% in the years prior to 2009 to 80% in 2010 to 75% currently.

Riders living in Seattle / N. King County are the least satisfied with on-time performance and travel time by bus.

- Lower satisfaction ratings for on-time performance are due to fewer "very satisfied" ratings. The percentage of Seattle / N. King County riders who are very satisfied with on-time performance has decreased from 36% in 2009 to 28% in 2011.
- Lower satisfaction ratings for travel time by bus are due a higher percentage of "dissatisfied" ratings. The percentage of Seattle / N. King County riders who are dissatisfied with travel time by bus has increased from 24% in 2009 to 29% in 2011.

	Seattle / N. King	South King	East King
	On-Time Performance		
Total Satisfied	73%	**80%**	**80%**
Very Satisfied	28%	**43%**	**41%**
Somewhat Satisfied	**45%**	37%	39%
Neutral / Dissatisfied	**28%**	20%	20%
	Travel Time by Bus		
Total Satisfied	70%	**78%**	**81%**
Very Satisfied	31%	33%	31%
Somewhat Satisfied	39%	45%	50%
Neutral / Dissatisfied	**30%**	22%	19%

	2001 - 2008	2009	2010	2011
	Number of Stops			
Total Satisfied	88%	84%	86%	83%
Very Satisfied	47%	40%	46%	45%
Somewhat Satisfied	41%	**44%**	40%	38%
	Where Routes Go			
Total Satisfied	84%	82%	83%	80%
Very Satisfied	49%	44%	44%	41%
Somewhat Satisfied	35%	38%	39%	39%
	Frequency of Service			
Total Satisfied	76%	79%	79%	77%
Very Satisfied	32%	37%	40%	36%
Somewhat Satisfied	44%	42%	39%	41%
	On-Time Performance			
Total Satisfied	82%	78%	80%	75%↓
Very Satisfied	40%	39%	37%	33%↓
Somewhat Satisfied	42%	39%	43%	42%
	Travel Time			
Total Satisfied	83%	76%	77%	74%
Very Satisfied	42%	33%	33%	32%
Somewhat Satisfied	41%	43%	44%	42%

***Question SAT1A–SAT1CC**: How satisfied are you with …?*
***Base:** All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 63: Satisfaction with Transferring

While riders give lower-than-average ratings to the number of transfers and wait time when transferring, they are less satisfied with wait time when transferring.

- Ratings for number of transfers have remained stable over the years. Ratings for wait time when transferring have been steadily decreasing due to a significant decrease in those who are very satisfied and in 2011 to a decrease in those who are somewhat satisfied.

Infrequent and, to a lesser extent, Moderate Regular Riders are less satisfied with the number of transfers required to complete a trip.

	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
	Number of Transfers		
Total Satisfied	**88%**	79%	73%
Very Satisfied	57%	48%	37%
Somewhat Satisfied	31%	31%	36%
Neutral / Dissatisfied	12%	**21%**	**27%**

Riders living in Seattle / North King County are the least satisfied with the number of transfers required to reach their destination. This holds true for all riders, regardless of the number of transfers they actually make.

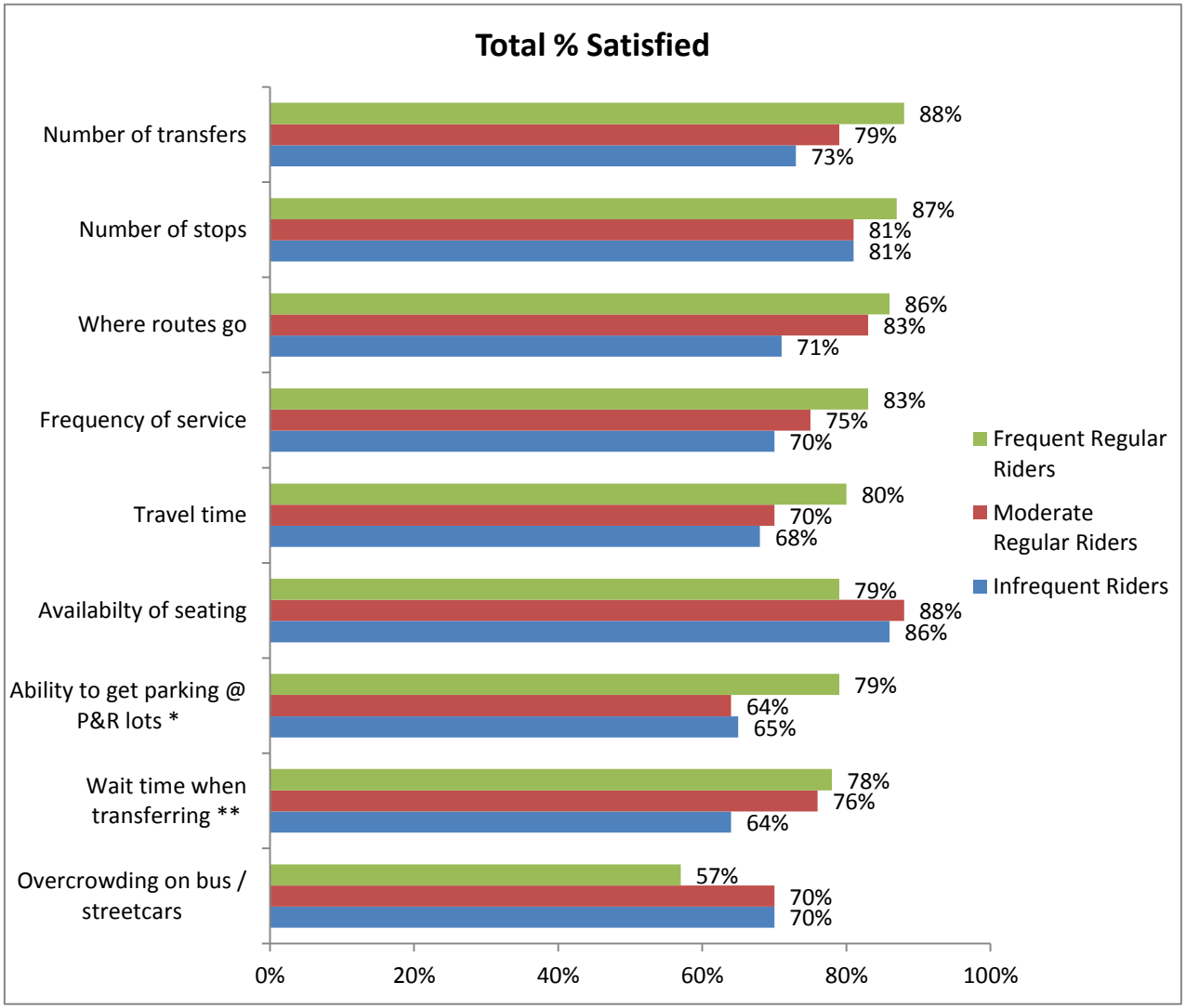
	Seattle / N. King	South King	East King
	Number of Transfers		
Total Satisfied	77%	89%	82%
Very Satisfied	48%	49%	46%
Somewhat Satisfied	29%	40%	36%
Neutral / Dissatisfied	**22%**	12%	19%

	2001 - 2008	2009	2010	2011
	Number of Transfers			
Total Satisfied	81%	81%	81%	81%
Very Satisfied	53%	50%	51%	48%
Somewhat Satisfied	28%	31%	30%	33%
Neutral / Dissatisfied	19%	19%	19%	19%
	Wait Time When Tranferring*			
Total Satisfied	77%	77%	75%	73%
Very Satisfied	29%	27%	24%	24%
Somewhat Satisfied	48%	50%	51%	49%
Neutral / Dissatisfied	23%	23%	25%	27%

***Question SAT1A–SAT1CC**: How satisfied are you with …?*
***Base:** All Regular and Infrequent Riders (n_{2011} = 1,455); * Asked only of Regular and Infrequent Riders who transfer (n = 717)*

Figure 64: Key Differences in Satisfaction between Rider Segments

- Frequent Regular Riders higher satisfaction with levels of service (frequency travel time) may reflect better service during the times they ride as well as a greater willingness to adjust their schedules to achieve the benefits of riding the bus (cost, convenience, etc.)
- Frequent Regular Riders are more likely to express dissatisfaction with overcrowding on the buses and the availability of seats, reflecting the times they ride.
- Infrequent and Moderate Regular Riders are more likely to express concerns with service levels, specifically travel time, frequency of service, and the number of transfers required. Lower satisfaction with these key elements of service most likely serve as the primary deterrent to taking additional discretionary trips.

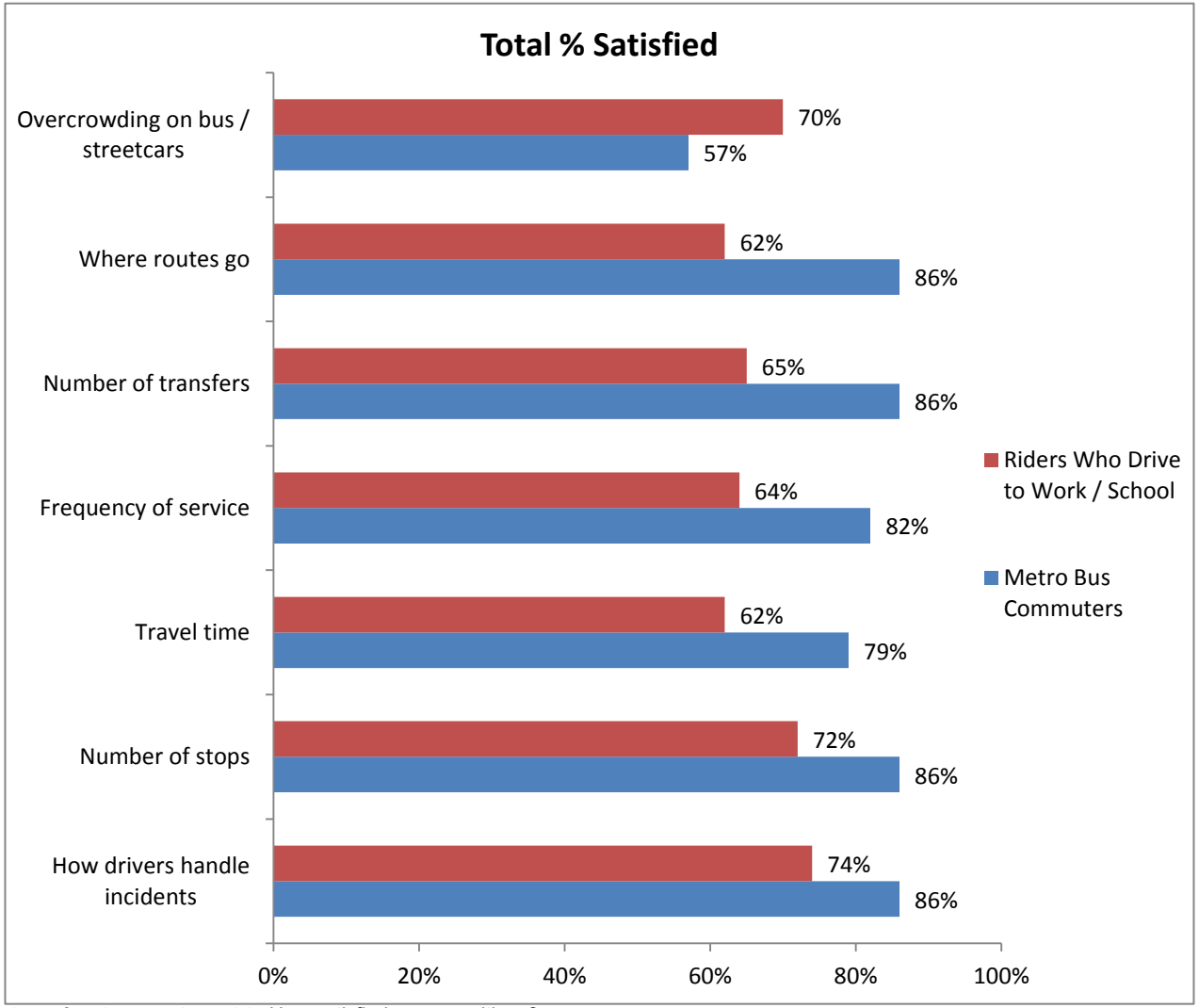


***Question SAT1A–SAT1CC**: How satisfied are you with …?*
***Base:** All Regular and Infrequent Riders (n_{2011} = 1,455); * Asked only of Regular and Infrequent Riders who use park-and-ride lots to park car and rider bus/train (n = 531); ** Asked only of Regular and Infrequent Riders who transfer (n = 717)*

Figure 65: Key Differences in Satisfaction between Metro Bus Commuters and Riders who Drive to Work / School

Lower satisfaction among commuters who ride Metro but drive to work is largely a function of service:

- Availability of service to where they need to go,
- Number of transfers required,
- Frequency of service,
- Travel time, and
- Number of stops.



***Question SAT1A–SAT1CC**: How satisfied are you with …?*
***Base:** All Regular and Infrequent Riders (n_{2011} = 1,455)*

Key Drivers

Key Drivers Analysis is an analytical methodology to identify which aspects of service have the greatest impact on overall customer satisfaction and advocacy. The analysis first identifies which of the eight overall dimensions of service contribute to customer satisfaction and advocacy. We then identify which specific elements of service within each dimension contribute to customer satisfaction and loyalty. Finally, we look at Metro performance on each element of service. Those elements of service that are identified as key drivers (denoted in discussion by a ) That receive below-average satisfaction ratings should be reviewed and additional resources devoted to improvements where practical.

	What We Found	What It Means
Level of Service	Level of service is by far the most important overall driver of customer satisfaction and loyalty and performance for all five elements of service is below average.	Metro should focus its efforts on those elements of service it can most realistically control and where satisfaction is lowest—frequency of service, on-time performance, and travel time.
Comfort	Comfort is the second key driver of overall customer satisfaction, and performance on the four elements of service is at or below the overall average. Overcrowding is rated lowest and is the lowest performing element across all those measured.	While financial constraints influence frequency of service and hence contribute to overcrowding, ensuring that buses run on time and are spaced per the schedule can reduce crowding. Empowering drivers to cue riders entering a crowded bus or to encourage those riders to consider other buses arriving soon would also have a positive effect. This may require more information tools for drivers, not all of whom are equally familiar with other routes. Rider communications through OneBusAway or a similar APP can also allow Riders to potentially choose a less crowded trip that still fits with their schedule.
Safety	Safety is the third most important driver of all customer satisfaction and loyalty. Safety while riding after dark is a key driver and receives below-average ratings. To some extent, this perception is neighborhood-specific and to some extent beyond Metro's control.	To the extent that Metro can improve the perception of bus stop/shelter safety, it should do so, especially as more Frequent Riders are riding later in the evening, outside core commute hours. Lighting, signage, seating, plantings and upkeep can all play a role in this perception as well as increased police presence through partnerships with local departments. Metro should continue to place emphasis on training and support for drivers to handle common problems that occur.

	What We Found	What It Means
Park-and-Ride Lots	While used by just over one out of three Metro riders, park-and-ride lots are the fourth most important driver of overall customer satisfaction and loyalty. Parking availability is the most important service element and Metro under-performs in this area. Vehicle safety and security is a secondary issue Metro may wish to address.	In some instances, lots may indeed be full. However, in others it may simply be difficult to find available parking and users become quickly frustrated with the time lost. In large lots. Use of newer technologies that accurately count and point drivers to available spots may improve satisfaction with parking availability. Presuming incidents (theft, vandalism, etc.) are tracked at park-and-ride lots, users should be able to easily access this information. Their perceptions may be based on a few publicized incidents or rumors rather than the aggregate data. Signage regarding common sense practices (e.g. concealing personal electronics) may be appropriate in park-and-ride lots where incidents are more frequent.
Transferring	Half (51%) of all Metro riders take a trip that typically requires a transfer. Because of its impact on travel time, this is the fifth most important driver of customer satisfaction and loyalty. While the number of transfers required is more important than wait time, riders are significantly less satisfied with wait time.	Providing real-time information through mobile APPS or at major transfer points can alleviate customer concerns with wait times.
Drivers	Metro drivers are the sixth most important service dimension and are a clear strength with above-average performance on all but one element of service. Of note, customer satisfaction with how well drivers handle problems on the bus increased significantly from 2010. Consistent announcement of next stop is the only attribute rated below the overall average.	While customer satisfaction with how drivers handle problems on the buses when they arise has improved, given the importance of this element, Metro should continue to focus on this area. Metro should also put additional efforts into stop announcements—either through increased automation or further driver training and encouragement. Optimizing the speaker system fidelity may also help.

	What We Found	What It Means
Information	While it is crucial that Metro provide information to its customers, by itself it is not a key driver of overall customer satisfaction and loyalty. Customer satisfaction with provision of traditional information on routes and schedules has decreased over the past several years while satisfaction with non-traditional sources is relatively high.	Though it remains important due to some customers' needs for more traditional media versus the flexibility and immediacy of information preferred by others, Metro should focus on digital communication long-term, particularly in terms of aggregating information to provide better decision support ("How do I…Which is better…") as an increasing number of elderly and lower-income riders have access to these media.
Fare Payment	Fare payment is no longer a key driver of customer satisfaction and loyalty and riders are generally satisfied with service delivery in this area.	Metro should continue its efforts to make it easy for customers to pay their fares. As new fare payment methods or policies are introduced (e.g., eliminating the RFA later in 2012), their impact should be monitored.

Figure 66: Key Drivers Analysis

Level of service is by far the single greatest driver of customer satisfaction and loyalty. And all five of the service elements making up this dimension are individually key drivers. Frequency of service is the most important.

Performance is lower than average for all five elements of service. Metro should focus its efforts on those elements of service it can most realistically control and where satisfaction is lowest:

- Frequency of service
- On-time performance
- Travel time

Service Element	Key Driver	Performance	
Frequency of service		Total Satisfied	77%
		Very Satisfied	36%
		Somewhat Satisfied	41%
Where routes go		Total Satisfied	80%
		Very Satisfied	41%
		Somewhat Satisfied	39%
On-time performance		Total Satisfied	75%
		Very Satisfied	33%
		Somewhat Satisfied	42%
Travel time		Total Satisfied	74%
		Very Satisfied	32%
		Somewhat Satisfied	42%
Number of stops		Total Satisfied	83%
		Very Satisfied	45%
		Somewhat Satisfied	38%

Comfort is the second key driver of overall customer satisfaction and loyalty. All four elements of service included in this dimension are key drivers. Inside cleanliness of buses and streetcars is the most important key driver within this dimension of service.

All elements of service within this dimension receive average or lower-than-average ratings. Overcrowding receives the lowest overall score of all service elements.

Service Element	Key Driver	Performance	
Inside cleanliness		Total Satisfied	87%
		Very Satisfied	40%
		Somewhat Satisfied	47%
Availability of seating		Total Satisfied	83%
		Very Satisfied	42%
		Somewhat Satisfied	41%
Cleanliness of shelters		Total Satisfied	82%
		Very Satisfied	35%
		Somewhat Satisfied	47%
Overcrowding		Total Satisfied	64%
		Very Satisfied	25%
		Somewhat Satisfied	39%

 = Key Driver; Red Border = Lowest Satisfaction; Orange = Low Satisfaction; Yellow = Above-Average Satisfaction; Green = Highest Satisfaction

Safety is the third most important driver of overall customer satisfaction and loyalty.

All elements of service with the exception of safety while riding after dark are key drivers of overall customer satisfaction and loyalty. The latter may be the exception as riders may simply avoid riding after dark.

Metro achieves above-average satisfaction ratings for daytime safety and safety in the transit system.

Safety while waiting after dark receives below-average ratings.

Service Element	Key Driver	Performance	
Daytime safety on bus		Total Satisfied	92%
		Very Satisfied	58%
		Somewhat Satisfied	33%
Safety while waiting after dark		Total Satisfied	73%
		Very Satisfied	28%
		Somewhat Satisfied	45%
Safety in the transit tunnel		Total Satisfied	90%
		Very Satisfied	56%
		Somewhat Satisfied	34%
Daytime safety while waiting		Total Satisfied	94%
		Very Satisfied	67%
		Somewhat Satisfied	27%
Safety while riding after dark		Total Satisfied	78%
		Very Satisfied	33%
		Somewhat Satisfied	45%

While used by only 37% of Metro customers, **park-and-ride lots** closely follow safety as the fourth key driver of overall customer satisfaction and loyalty. All elements included in this dimension are individually key drivers.

Parking availability is the most important service element and Metro under-performs in this area. Metro should be focused on this area.

Vehicle security receives a somewhat above-average satisfaction rating and should be monitored. Coordination with local police departments to mine incident data and identify common problem areas/risk factors that could be better communicated/addressed may also be productive.

Service Element	Key Driver	Performance	
Parking availability		Total Satisfied	72%
		Very Satisfied	38%
		Somewhat Satisfied	34%
Personal safety		Total Satisfied	89%
		Very Satisfied	51%
		Somewhat Satisfied	38%
Vehicle security		Total Satisfied	84%
		Very Satisfied	42%
		Somewhat Satisfied	42%

Half (51%) of all customers take trips that typically require a transfer, making this the fifth key driver of overall customer satisfaction and loyalty. While both are key drivers, the number of transfers required is twice as important as wait time when transferring. At the same time, customers are significantly less satisfied with wait times than with the number of transfers required. Dissatisfaction with wait time may be a proxy for dissatisfaction with having to transfer in the first place.

Service Element	Key Driver	Performance	
Number of transfers		Total Satisfied	81%
		Very Satisfied	48%
		Somewhat Satisfied	33%
Wait time when transferring		Total Satisfied	73%
		Very Satisfied	24%
		Somewhat Satisfied	49%

 = Key Driver; Red Border = Lowest Satisfaction; Orange = Low Satisfaction; Yellow = Above-Average Satisfaction; Green = Highest Satisfaction

Metro drivers are the sixth most important driver of overall customer satisfaction and loyalty and all aspects of service provided by drivers are important. Riders are generally satisfied with all aspects of service within this dimension. This finding, in particular, should be messaged strongly to drivers, who should know how important their roles are and feel satisfaction in their quality of work as perceived by riders.

Service Element	Key Driver	Performance	
Effectively handle problems		Total Satisfied	84%
		Very Satisfied	49%
		Somewhat Satisfied	35%
Courtesy		Total Satisfied	94%
		Very Satisfied	67%
		Somewhat Satisfied	27%
Operates bus safely		Total Satisfied	96%
		Very Satisfied	71%
		Somewhat Satisfied	25%
Announces next stop		Total Satisfied	81%
		Very Satisfied	47%
		Somewhat Satisfied	34%
Helpfulness with route / stop info		Total Satisfied	92%
		Very Satisfied	62%
		Somewhat Satisfied	30%

Overall information is not a critical driver of overall customer satisfaction and loyalty. This was true in previous years as well.

While riders are satisfied with the ability to get information and printed timetables, satisfaction with these two elements of service has decreased over the last several years as Metro has moved increasingly to providing information via the web or through mobile applications.

Service Element	Key Driver	Performance	
Ability to get information		Total Satisfied	88%
		Very Satisfied	59%
		Somewhat Satisfied	29%
Ability to get printed timetables		Total Satisfied	83%
		Very Satisfied	54%
		Somewhat Satisfied	29%
Metro online sources		Total Satisfied	
		Very Satisfied	
		Somewhat Satisfied	
Non-Metro online sources		Total Satisfied	
		Very Satisfied	
		Somewhat Satisfied	

Unlike previous years, fare payment is not an overall key driver of customer satisfaction and loyalty. This would suggest that as customers have become accustomed to new fare types and payment methods, problems are fewer and are less likely to affect the customer experience. Metro customers are generally satisfied with all aspects of fare payment.

Service Element	Key Driver	Performance	
Ease of paying fares		Total Satisfied	91%
		Very Satisfied	68%
		Somewhat Satisfied	23%
Ease of loading value /passes		Total Satisfied	84%
		Very Satisfied	64%
		Somewhat Satisfied	20%
ORCA Cards overall		Total Satisfied	96%
		Very Satisfied	82%
		Somewhat Satisfied	14%

 = Key Driver; Red Border = Lowest Satisfaction; Orange = Low Satisfaction; Yellow = Above-Average Satisfaction; Green = Highest Satisfaction

Important Service Elements

Periodically respondents who are riders are asked to rate the importance of key elements of service in deciding to ride the bus. Several changes were to made to this question series. In 2011, respondents rated 13 elements of service; in the past fewer were rating. Moreover, in previous years ratings were given on a 4-point scale ranging from "1" representing "not at all important" to "4" representing "very important." In 2011, the scale was changed to a 7-point scale, with "1" representing "not at all important" and "7" representing "extremely important." A longer scale with more clearly defined end scale points will typically have greater variance suggesting that they are more effective in discriminating between different levels.

	What We Found		What It Means
Most Important Service Elements	Level and quality of service followed by safety are the most important determinants of customers' decision to ride. Availability of service near customers' homes and where they need to go is by far the most important element of service.	Availability of Service **72%** Important On-Time Performance **63%** Important Frequency of Service **61%** Important Travel Time **59%** Important	This confirms the key findings from the comprehensive Key Drivers Analysis.
Importance & Satisfaction	While the majority of customers say they are satisfied with frequency of service, on-time performance, and travel time, compared with other key elements of service, these receive lower-than-average ratings. At the same time these are the most important determinants of customers' decision to ride. Key aspects of safety, notably after dark, are also target areas. Satisfaction levels vary by region.	Availability of Service **80%** Frequency of Service **77%** Total Satisfied On-Time Performance **75%** Total Satisfied Travel Time by Bus **74%** Total Satisfied Safety Riding when Dark **78%** Total Satisfied Safety Waiting when Dark **73%** Total Satisfied	Within the constraints of operating a complex system, Metro should continue to focus on these key areas. Differences in satisfaction levels enable Metro to target service improvements. For example, frequency of service and on-time performance are more important in Seattle / North King and East King County. Safety is the key issue in South King County.

Important Service Elements

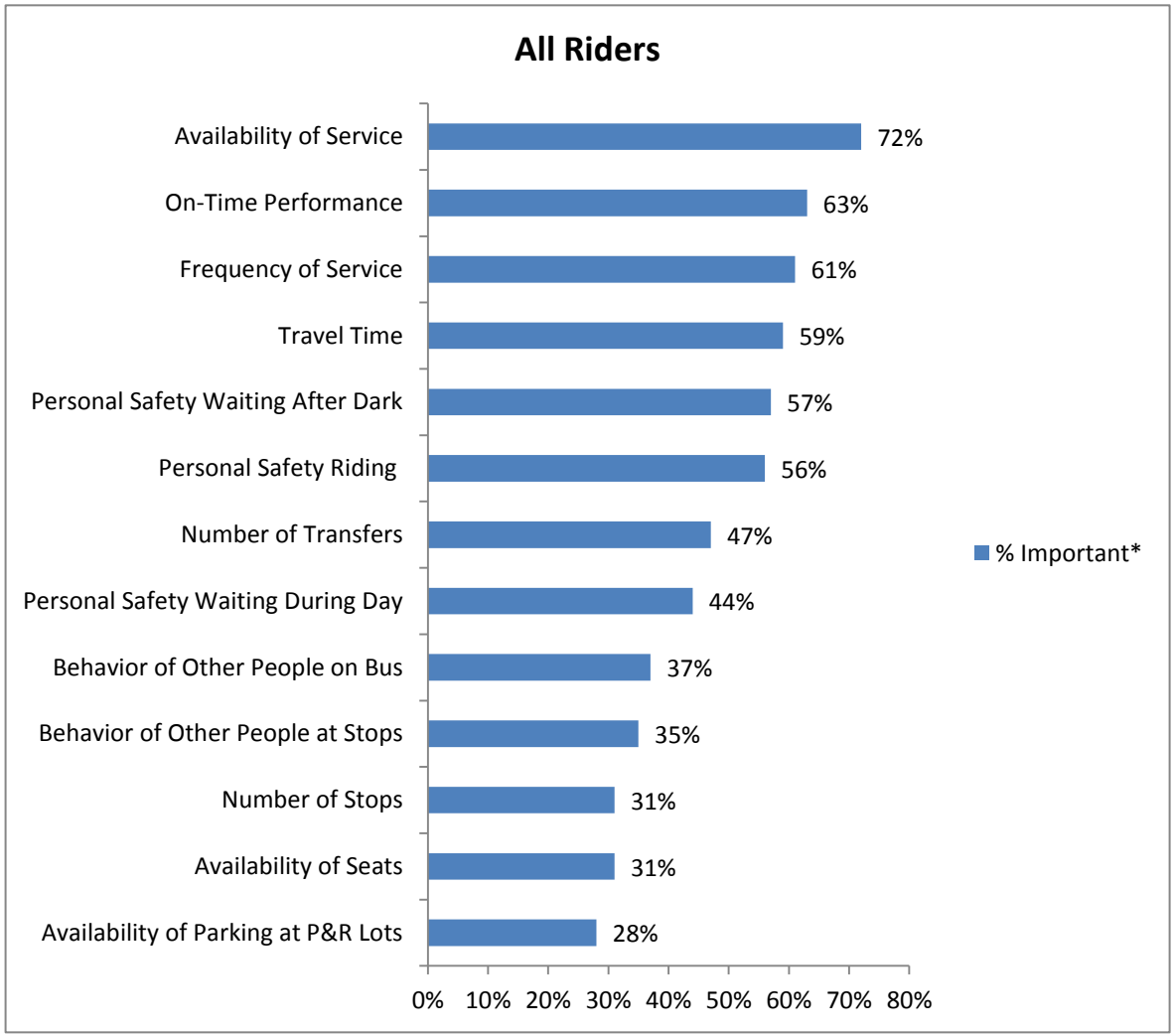
Figure 67: Importance of Key Elements of Service in Deciding to Ride

The level and quality of service are clearly the most important elements of service in deciding to ride, notably:

- Availability of service from the customers' home to where they need to go
- On-time performance
- Frequency of service
- Travel time by bus

Safety is also important, notably

- Personal safety while waiting for the bus when it is dark and
- Personal safety while riding



Question *IMPT_01-IMPT_13: Tell me how important each item is…*
Base*: All Regular and Infrequent Riders (n_{2011} = 1,455)*
** % Important includes ratings of 6 or 7 on 7-point scale.*

Figure 68: Important Service Elements by Rider Status

Regular Riders rate all of these service elements as more important than do Infrequent Riders.

Frequent Regular Riders rate the following three items higher than Moderate Regular Riders:

- On-time performance
- Frequency of service
- Availability of service

	All Riders	All Regular Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders
	% Important (6 – 7)				
Availability of Service	72%	72%	83%	73%	63%
On-Time Performance	63%	63%	72%	61%	58%
Frequency of Service	61%	61%	74%	60%	53%
Travel Time	59%	59%	64%	61%	54%
Personal Safety Waiting After Dark	57%	57%	61%	59%	53%
Personal Safety Riding	56%	56%	64%	59%	49%
Number of Transfers	47%	47%	52%	41%	46%
Personal Safety Waiting During Day	44%	44%	49%	50%	38%
Behavior of Other People on Bus	37%	37%	43%	41%	31%
Behavior of Other People at Stops	35%	35%	39%	38%	31%
Availability of Seats	31%	31%	38%	26%	26%
Number of Stops	31%	31%	37%	32%	25%
Availability of Parking at P&R Lots	28%	28%	31%	22%	27%

Question *IMPT_01-IMPT_13: Tell me how important each item is…*

Base*: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Figure 69: Important Service Elements by Former Planning Areas

There are several significant differences based on where people live:

- Riders living in Seattle / North King County and, to a lesser extent, East King County place greater importance on availability of service and on-time performance, due to a greater percentage saying these elements of service are "extremely important."
- Riders living in South King County rate safety while waiting for the bus during the day significantly higher. Moreover, while all riders say that safety while waiting after dark is important, those living in South King County are the most likely to say it is extremely important (50%).
- Riders in East King County and, to a lesser extent, South King County are more likely to say that personal safety while riding is important. However, those living in South King County are more likely than those living in East King County to suggest it is extremely important.
- Riders in East King County and, to a lesser extent, South King County are more likely to suggest that the availability of parking at park-and-ride lots is important.
- Riders in East King County rate the number of transfers they have to make higher in importance.

	Seattle / N. King	South King	East King
Availability of Service	75%	65%	69%
On-Time Performance	65%	61%	59%
Frequency of Service	63%	54%	62%
Travel Time	60%	53%	62%
Personal Safety Waiting After Dark	55%	56%	65%
Personal Safety Riding	52%	**61%**	**64%**
Number of Transfers	46%	45%	**52%**
Personal Safety Waiting During Day	40%	**57%**	46%
Behavior of Other People on Bus	35%	48%	34%
Behavior of Other People at Stops	32%	42%	37%
Availability of Seats	28%	35%	33%
Number of Stops	29%	39%	27%
Availability of Parking at P&R Lots	18%	**36%**	**47%**

Quadrant Analysis

Figure 70: Quadrant Analysis

One way to evaluate the importance of various service attributes is to examine their relationship to satisfaction using a quadrant map. Quadrant analysis is used to identify the strengths and weaknesses associated with a customer's overall experience. The quadrant maps developed with data from this survey plot the importance of specific attributes by respondents' satisfaction with that attribute. The resulting map shows which attributes are priorities for improving the experience of Metro riders.

Five items are important to customers, yet satisfaction is lower-than-average. Three of the five are related to the overall quality of service:

- Frequency of service
- On-time performance
- Travel time

Personal safety while waiting for the bus is also of high importance and receives lower-than-average satisfaction ratings.

Availability of service was not in this quadrant in 2007, the last time this analysis was done. On the other hand, wait times when transferring was.

Two elements of service are high in importance but satisfaction scores are ambivalent and could be strengths if performance improved:

- Availability of service
- Number of transfers

Two additional elements of service are less important but also receive below average satisfaction ratings:

- Conduct of others on the bus after dark
- Availability of parking at park-and-ride lots

It is important to note that satisfaction with availability of parking at park-and-ride lots receives low satisfaction ratings but for many is unimportant. The Key Drivers Analysis presented in the previous section shows that for park-and-ride lot users, the availability of parking is a key driver of overall satisfaction and advocacy and satisfaction ratings are below-average.

Metro does well in four other areas that are less important to customers:

- Personal safety while waiting during the day
- Conduct of others on the bus during the day
- Number of stops
- Availability of seats

The Key Drivers Analysis clearly shows that customers are willing to trade-off number of stops for more frequent service, travel time, and on-time performance.

Daytime safety is not an issue.


Low Importance / High Satisfaction
High Importance / High Satisfaction
Personal Safety Waiting During Day
Conduct of Other on Bus During Day
Number of Stops
Availablity of Seats
Number of Transfers
Availability of Service
Conduct of Others on Bus After Dark
Frequency of Service
On-Time Performance
Travel Time
Personal Safety Waiting After Dark
Availability of Parking at P&R Lots
Low Importance / Low Satisfaction
High Importance / Low Satisfaction

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Non-Riders

Every two to three years, the sample size for this survey is increased to include a representative sample of Non-Riders. Questions focus on former ridership, potential ridership, and barriers to riding.

	What We Found	Key Stats	What It Means
Former Ridership	There has been little change in the extent to which current Non-Riders have ridden in the past. Currently three out of ten King County residents have never ridden and two out of five have ridden in the past one to four years. Most (78%) Former Riders used Metro for non-commute trips. The primary reason Former Riders do not ride or do not ride more often is simply a matter of convenience—car is more convenient (18%) or bus is inconvenient (10%). Availability of service is the second most common reason given (18%).	Former Riders **41%** Never Ridden **31%**	The percentage of Former Riders remains high, providing significant potential re-conversion to current ridership. However, it is likely that most trips will continue to be periodic, non-commute trips.
Potential Ridership	More than half of all Non-Riders, Infrequent Riders, and Regular Riders who do not use the bus for most of their travel say that riding the bus is appealing. Nearly half (46%) of all Non-Riders suggest that riding the bus is appealing for at least some trips. Potential ridership is significantly higher among Former Riders (62%) than among those who have never ridden (28%). Young, males represent the greatest opportunity for incremental ridership.	Total Appeal **51%** All Travel **14%** Commute Only **12%** Personal Only **25%**	As with Non-Riders, Former Riders may remember / perceive poor transit service levels / overcrowding that has improved without their being aware. Likewise, they may have forgotten some of the reasons they rode the bus in the first place. A “summer’s easier on the bus” [an example] campaign focusing on summer destinations such as the beach, concerts, casinos, wineries and nightlife districts is a theme that can be tailored to both Former Riders and Non-Riders, including connections that can be made with private shuttles to Tulalip, etc.

	What We Found	Key Stats	What It Means
Barriers to Riding	Frequency and location of routes, coupled with a need for car use during the day/shift, remain the leading barriers to ridership. However, some perceptions of insufficient access may not be fact-based. Nearly one out of four (23%) potential riders says they would definitely ride if these barriers did not exist; an additional 35% say they probably would ride. Among those who say they probably would ride, access and convenience are the primary barriers (35% and 36%, respectively).	Service Convenience 32% Sig. Barrier Personal / Work Schedule 29% Sig. Barrier Access to Service 28% Sig. Barrier Disincentives 18% Sig. Barrier Comfort & Safety 13% Sig. Barrier	Consistent, clear communication at the neighborhood as well as central levels regarding route maps and frequency, as well as hours covered, can overcome some misconceptions and inaccurate memories of service gaps. Some Non-Riders may not have seen a schedule in some years, yet perceive that the service they need does not exist. Metro might consider a rotating first read module on the Web site, for example, that highlights a particular area and routes serving major landmarks.

Former Ridership

Figure 71: Former Ridership

Three out of ten residents have never ridden Metro or have not ridden in the past 5 years. Given the significant changes in the system over time, anyone who has not ridden within the last 5 years should be considered a Non-Rider.

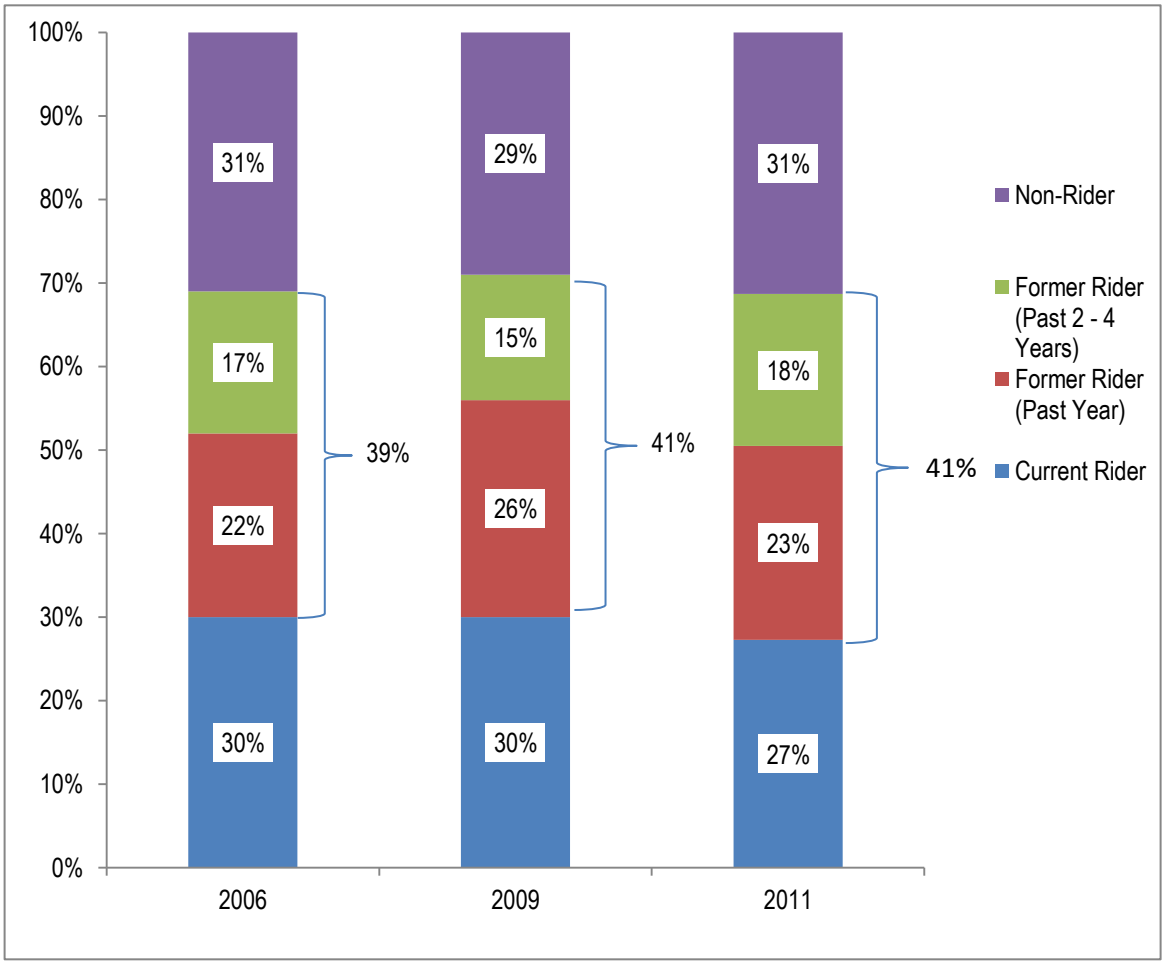
Two out of five residents are Former Riders—that is they have ridden in the past 1 to 4 years but not the past month.

- This figure has varied little over the years.

The percentage who has never ridden is three times higher in South and East King county than in Seattle / N. King County.

- While current ridership is significantly higher in Seattle / North King County, former ridership is relatively consistent throughout the county.
- Residents of South King County are the most likely to have never ridden.

	Seattle / N. King	South King	East King
Non-Rider	13%	44%	39%
Former Rider	41%	39%	44%
Current Rider	46%	16%	18%



Question NON2: *When was the last time you rode a Metro bus or the South Lake Union Streetcar?*
Base: *All Non- Riders (n_{2011} = 1,066)*

Most Former Riders used Metro for non-commute trips.

	% Rode for. . .
Fun / recreation	30%
Special events	12%
Shopping / errands	11%
Travel to DT Seattle	8%
Other non-commute	16%
To / from work / school	22%

NON2A - When you rode the bus or streetcar, what was the primary purpose of the trip you took most often?
Base: Former Riders (n_{2011} = 600)

Most Former Riders do not ride or do not ride Metro more often because a car is more convenient.

Availability of service is the second major reason.

	Reasons for Not Riding
Car more convenient	18%
Bus is inconvenient	10%
No routes available / service not close to home	18%
Bus takes too long	9%
Change in work / personal circumstances	9%
Don't travel / leave home that often / retired	7%
Work at / close to home	5%

NON3 - What is the main reason you don't ride the bus or streetcar?
Base: Former Riders (n_{2011} = 600)

Potential Ridership

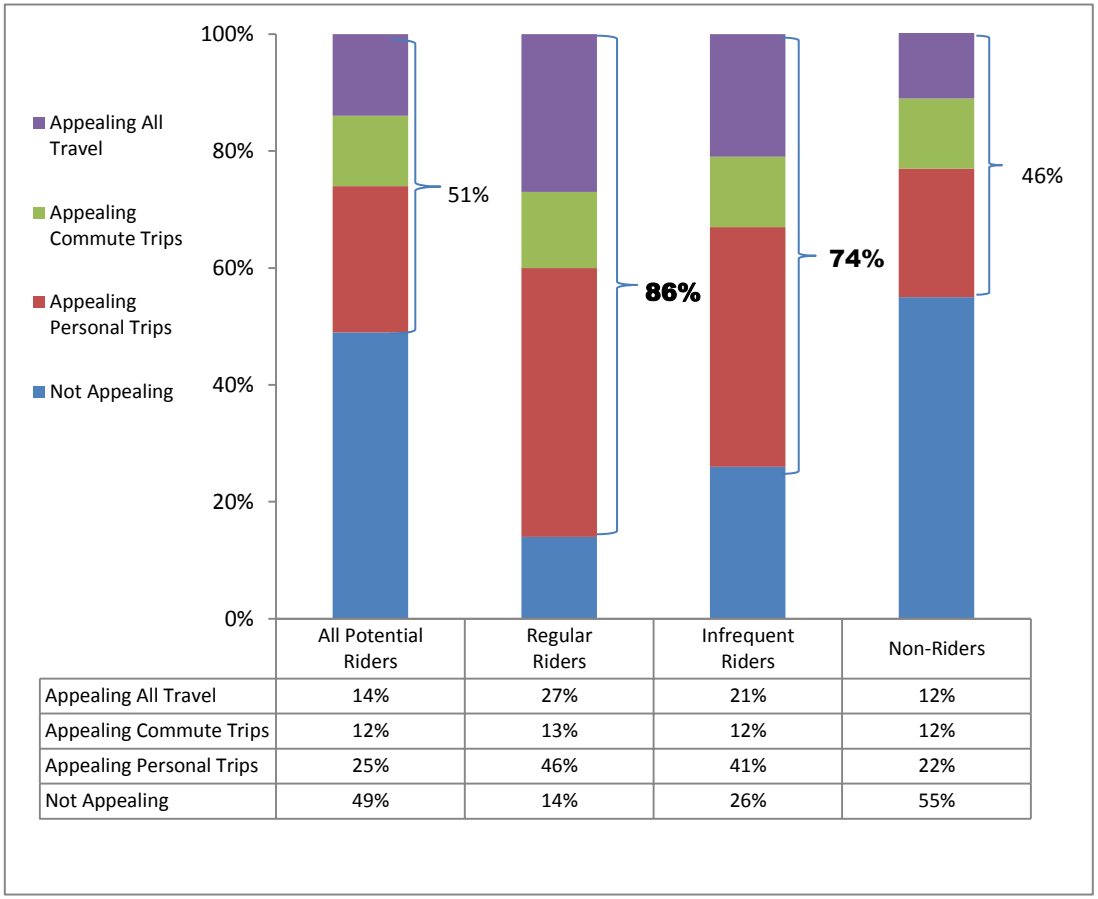
Regular Riders who drive alone to work or for their personal travel, Infrequent Riders, and Non-Riders were asked to indicate the extent to which Metro is appealing for their work or personal travel. Those indicating that using Metro is "somewhat" or "very" appealing are considered potential riders.

Figure 72: Potential Ridership

Growth in ridership is most likely to come from:

- Encouraging Regular Riders who currently drive to work or who primarily use their car for personal travel to use Metro for some of these trips
- Encouraging Infrequent Riders to use Metro for more trips
- Recent Former Riders

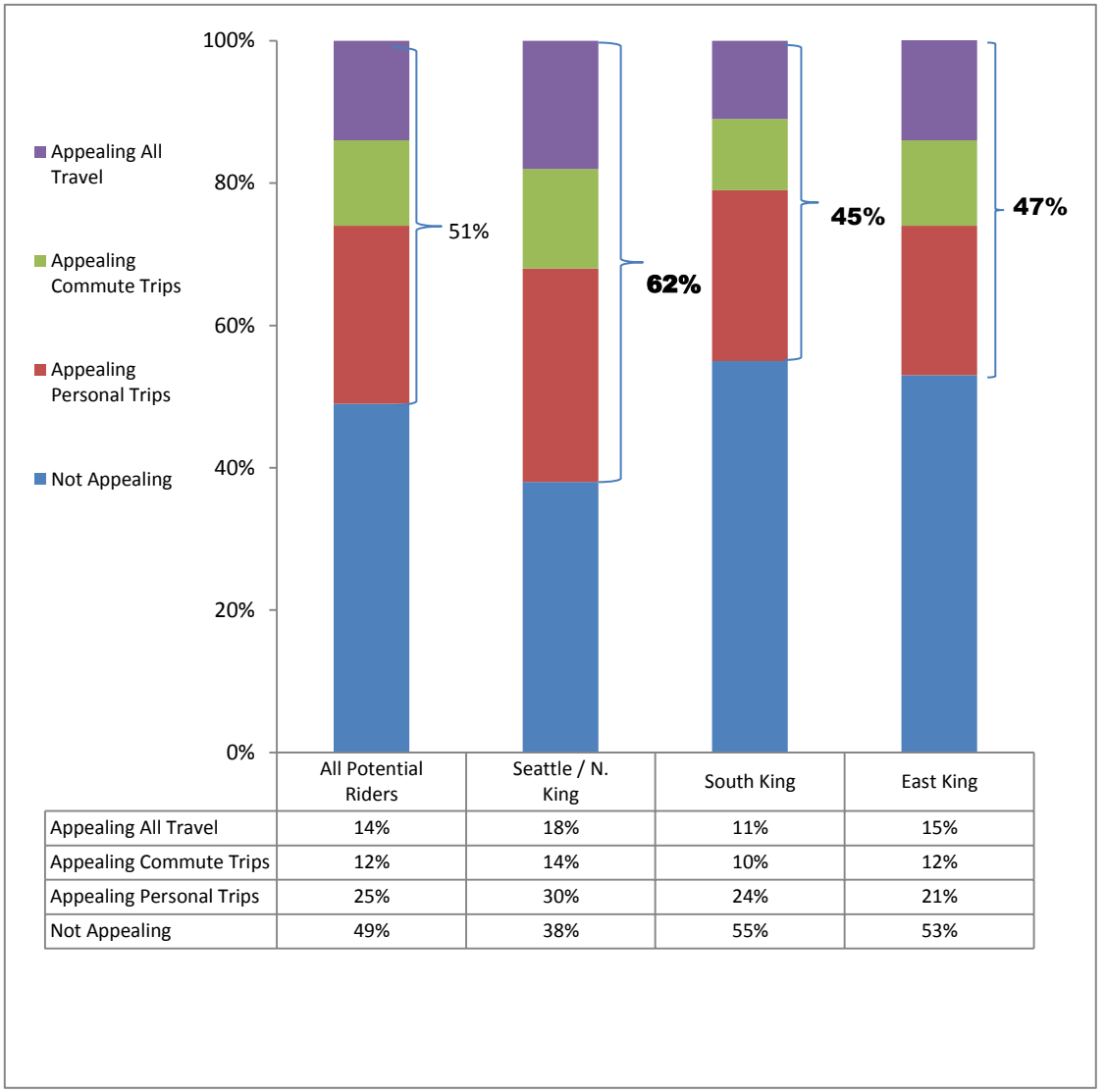
	Non-Riders		
	Former Riders (past yr.)	Former Riders (1-4 yrs.)	Never Riders
Total Appeal	**67%**	**50%**	28%
Appealing All Travel	23%	9%	7%
Appealing Commute Only	16%	15%	6%
Appealing Personal Only	28%	26%	15%
Not Appealing	33%	50%	**72%**



	All Potential Riders	Regular Riders	Infrequent Riders	Non-Riders
Appealing All Travel	14%	27%	21%	12%
Appealing Commute Trips	12%	13%	12%	12%
Appealing Personal Trips	25%	46%	41%	22%
Not Appealing	49%	14%	26%	55%

COMPUTED VARIABLES BASED ON: ***PARK3****-Overall, how appealing to you personally is the idea of using the bus instead of driving to work or school? AND* ***PERT2****-Overall, how appealing to you personally is the idea of using the bus for your personal, non-work travel?*
Base: All Potential Riders (n_{2011} = 1,589)

The potential for increased ridership is greatest in Seattle / North King County; however, penetration is already high in this area.



	All Potential Riders	Seattle / N. King	South King	East King
Appealing All Travel	14%	18%	11%	15%
Appealing Commute Trips	12%	14%	10%	12%
Appealing Personal Trips	25%	30%	24%	21%
Not Appealing	49%	38%	55%	53%

COMPUTED VARIABLES BASED ON: ***PARK3****-Overall, how appealing to you personally is the idea of using the bus instead of driving to work or school? AND* ***PERT2****-Overall, how appealing to you personally is the idea of using the bus for your personal, non-work travel?*
Base: All Potential Riders (n_{2011} = 1,589)

Figure 73: Demographic Characteristics of Potential Riders

Potential Riders who feel the bus is appealing for both commute and personal trips are more often:

- Younger (18 to 34) men
- Employed full-time
- Moderately affluent

Potential Riders who would consider using the bus for commute trips only are more often:

- Men between the ages of 35 and 54
- Employed full-time
- Affluent

Potential Riders who would consider using the bus for personal trips only are more to be:

- Older (55 plus) women
- Retired
- Less affluent

	Appealing All Travel	Appealing Commute	Appealing Personal	Not Appealing
Gender				
Male	**60%**	**61%**	40%	49%
Female	40%	39%	**60%**	51%
Age				
18 – 34	**43%**	31%	22%	23%
35 – 54	39%	**53%**	35%	40%
55 plus	17%	16%	**43%**	37%
Mean	39.8	41.1	50.3	48.4
Employment Status				
Employed FT	**73%**	**84%**	27%	40%
Employed PT	14%	9%	7%	10%
Self-Employed	8%	5%	12%	11%
Student	5%	2%	4%	4%
Homemaker	-	-	12%	8%
Retired	-	-	**27%**	22%
Unemployed	-	-	11%	6%
Household Income				
< $35,000	17%	9%	**30%**	18%
$35K - $55K	22%	12%	19%	18%
$55K - $100K	35%	34%	28%	35%
$100K plus	27%	**45%**	23%	29%
Median	$72,713	$93,849	$57,243	$71,260

Barriers to Riding

Figure 74: Barriers to Riding

Potential Riders consider five primary factors as barriers to riding.

- Service convenience, access to service and an individual's personal and work schedules are the three primary barriers.

As the subsequent analysis shows, the importance of these factors varies by segment, as does the importance of the specific barriers that make up each factor (in bold).

	% Significant Barrier
Convenience of Service	**32%**
Having to plan around bus schedule	39%
Travel time by bus	38%
Having to transfer	27%
Frequency of service	22%
Personal & Work Schedule	**29%**
Frequently work late	34%
Irregular work schedule	33%
Need car for emergency at home	30%
Need car during the day for business	26%
Need car during day for personal errands	22%
Access to Service	**28%**
No routes available	43%
Frequency of service after 6:00 p.m.	29%
No stop near home	27%
No stop near destination	26%
No access to park-and-ride lot	15%
Disincentives	**18%**
Employer provides parking	20%
Lack of parking at park-and-ride lots	15%
Comfort & Safety	**13%**
Conduct of others while waiting for bus	15%
Overcrowding	15%
Personal safety while waiting for the bus	13%
Conduct of others while riding the bus	13%
Personal safety while riding the bus	12%
Don't know how to ride the bus	12%
Availability of seats	11%

Question BARR1 TO BARR22 *-Please rate the extent to which each of the following is a barrier to you taking the bus or taking the bus more often?* Significant Barrier is defined as giving a rating of 6 to 7 on this scale.) ***Base****: Infrequent / Non-Riders Who Find Bus Travel Appealing Or Regular Riders Who Drive Alone For Commute Trips And Find Bus Appealing (n_{2011} = 991)*

Figure 75: Barriers to Riding: Appealing for All Travel

Potential Riders who suggest that riding the bus is appealing are somewhat less likely to suggest that some factors are less of a barrier, notably:

- Comfort and safety related to the conduct of others as well as personal safety
- Personal and work schedules, specifically need for a car in case of an emergency at home or during the day for business.

	All Potential Riders	Appealing for All Travel
	% Significant Barrier	
Convenience of Service	**32%**	**30%**
Travel time by bus	38%	37%
Having to plan around bus schedule	39%	36%
Having to transfer	27%	24%
Frequency of service	22%	22%
Access to Service	**28%**	**27%**
No routes available	43%	39%
Frequency of service after 6:00 p.m.	29%	29%
No stop near destination	26%	27%
No stop near home	27%	26%
No access to park-and-ride lot	15%	15%
Personal & Work Schedule	**29%**	**25%**
Irregular work schedule	33%	32%
Frequently work late	34%	30%
Need car for emergency at home	30%	**23%**
Need car during the day for business	26%	21%
Need car during day for errands	22%	19%
Disincentives	**18%**	**16%**
Employer provides parking	20%	17%
Lack of parking at park-and-ride lots	15%	14%
Comfort & Safety	**13%**	**9%**
Overcrowding	15%	14%
Conduct of others while waiting for bus	15%	10%
Conduct of others while riding the bus	13%	9%
Availability of seats	11%	9%
Don't know how to ride the bus	12%	9%
Personal safety while waiting for the bus	13%	7%
Personal safety while riding the bus	12%	6%

Figure 76: Barriers to Riding: Appealing for Commute Travel Only

For those who feel that using the bus is appealing for commute travel, convenience of service is the primary barrier, notably:

- Travel time by bus and
- Frequency of service

The other primary barrier is the lack of available routes.

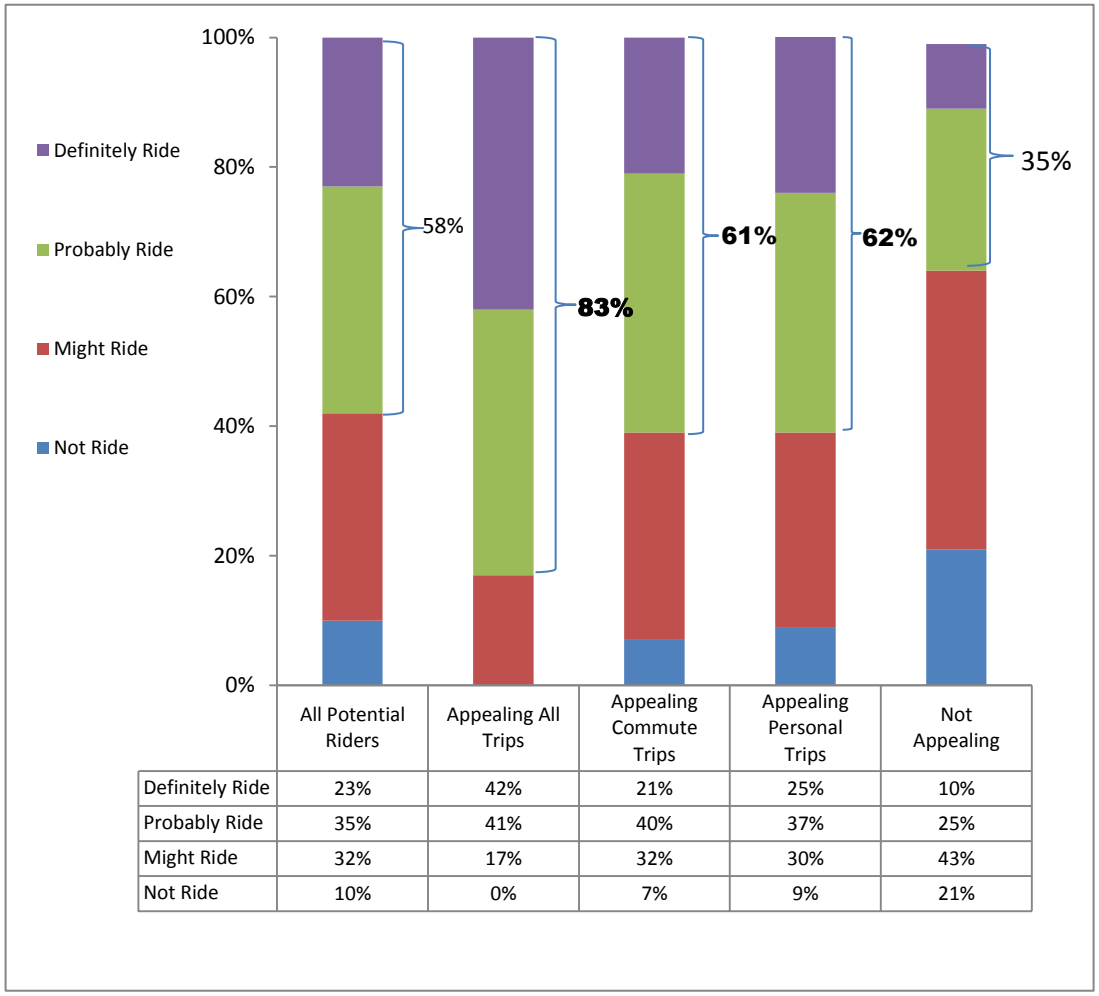
	All Potential Riders	Appealing for Commute Travel
	% Significant Barrier	
Convenience of Service	**32%**	**36%**
Travel time by bus	38%	**49%**
Having to plan around bus schedule	39%	41%
Having to transfer	27%	28%
Frequency of service	22%	**27%**
Personal & Work Schedule	**29%**	**29%**
Frequently work late	34%	37%
Irregular work schedule	33%	34%
Need car for emergency at home	30%	33%
Need car during the day for business	26%	24%
Need car during day for errands	22%	18%
Access to Service	**28%**	**28%**
No routes available	43%	**55%**
Frequency of service after 6:00 p.m.	29%	28%
No stop near home	27%	25%
No stop near destination	26%	25%
No access to park-and-ride lot	15%	10%
Disincentives	**18%**	**16%**
Employer provides parking	20%	20%
Lack of parking at park-and-ride lots	15%	13%
Comfort & Safety	**13%**	**7%**
Overcrowding	15%	11%
Conduct of others while riding the bus	13%	7%
Personal safety while riding the bus	12%	7%
Conduct of others while waiting for bus	15%	7%
Personal safety while waiting for the bus	13%	6%
Availability of seats	11%	6%
Don't know how to ride the bus	12%	6%

Figure 77: Potential for Ridership if Barriers Do Not Exist

Removal of barriers to ridership would have a positive impact on ridership, particularly among that segment of Potential Riders who feel that riding the bus for all types of trips is appealing.

Access to and convenience of service are clearly the greatest barrier for those who would definitely ride if these barriers did not exist, notably:

- Availability of stops near home and work location
- Frequency of service and, to a lesser extent, travel time by bus
    - Three out of five (59%) riders who say that the bus is appealing for commute trips and 53% of those who say it is a barrier for all trips say they would definitely ride if these barriers were removed. While these intentions are no doubt somewhat overstated, they represent a significant market potential.



	All Potential Riders	Appealing All Trips	Appealing Commute Trips	Appealing Personal Trips	Not Appealing
Definitely Ride	23%	42%	21%	25%	10%
Probably Ride	35%	41%	40%	37%	25%
Might Ride	32%	17%	32%	30%	43%
Not Ride	10%	0%	7%	9%	21%

***Question BARR23**-If these barriers did not exist, would you ride the bus more often?*
Base: Infrequent / Non-Riders Who Find Bus Travel Appealing Or Regular Riders Who Drive Alone For Commute Trips And Find Bus Appealing (n_{2011} = 991)

	Definitely Would Ride	Probably Would Ride	Might Ride	Not Ride
	% Significant Barrier			
Access to Service	**35%**	**26%**	**26%**	**27%**
No routes available	54%	40%	39%	43%
No stop near home	32%	28%	26%	22%
No stop near destination	31%	24%	25%	20%
Frequency of service after 6:00 p.m.	41%	23%	24%	33%
No access to park-and-ride lot	15%	14%	16%	18%
Personal & Work Schedule	**25%**	**24%**	**33%**	**42%**
Frequently work late	33%	27%	41%	42%
Need car during the day for business	18%	22%	29%	45%
Irregular work schedule	34%	28%	36%	37%
Need car during day for errands	19%	16%	24%	44%
Need car for emergency at home	22%	27%	37%	43%
Convenience of Service	**36%**	**27%**	**33%**	**33%**
Travel time by bus	46%	33%	39%	38%
Having to plan around bus schedule	43%	33%	42%	41%
Having to transfer	28%	25%	28%	33%
Frequency of service	28%	19%	23%	20%
Disincentives	**18%**	**18%**	**17%**	**20%**
Employer provides parking	20%	19%	23%	19%
Lack of parking at park-and-ride lots	16%	16%	11%	21%
Comfort & Safety	**10%**	**11%**	**15%**	**21%**
Conduct of others while waiting for bus	11%	11%	19%	24%
Overcrowding	15%	15%	14%	23%
Don't know how to ride the bus	10%	10%	14%	19%
Safety while waiting for the bus	8%	12%	15%	25%
Availability of seats	7%	11%	12%	14%
Conduct of others while riding the bus	10%	10%	15%	20%
Personal safety while riding the bus	6%	11%	14%	25%

Question BARR23*-If these barriers did not exist, would you ride the bus more often?*
Base: Infrequent / Non-Riders Who Find Bus Travel Appealing Or Regular Riders Who Drive Alone For Commute Trips And Find Bus Appealing (n_{2011} = 991)

Special Topics

	What We Found	Key Stats	What It Means
Advocacy	While Metro's overall advocacy score is negative, this is largely driven by Non-Riders' perceptions. Metro's overall advocacy score among Riders is positive and exceeds that achieved by other transit systems using this measure	Overall **-19** Riders **28** Non-Riders **-38**	Advocacy and support for transit is important across all segments. Metro should continue to target its communications to Non-Riders emphasizing the benefits and encouraging their support even if they don't ride.
Environmental Impact	Over half of all riders would drive alone for their primary trip if transit was not available.	Drive Alone 52% Purchase a Vehicle 27%	Metro has a clear environmental impact by keeping cars of the road but also an economic impact by providing a less expensive way to travel and reducing the need for people to own multiple vehicles.
Information	Traditional information sources—information at bus stops, transit centers, park-and-ride lots and printed timetables—continue to be an important source of information for Metro customers. Google's Trip Planner is the most widely use third-party source of information. Awareness and subsequent use of Metro alerts is relatively low.	Primary Sources of Information @ Stops 76% Printed timetables 75% Metro Online 76% Google's Trip Planner 74% Regional Trip Planner 77%	Opportunities to communicate with customers have increased significantly over the past several years. Metro should continue to provide information through traditional sources while also taking advantage of new technologies.

Advocacy

In 2010, a new question was added to measure the extent to which Riders would recommend riding to others. The question and analysis is based on the well-known Net Promoter Score (www.netpromoter.com). In 2011, the question was asked of Non-Riders for the first time.

Figure 78: Advocacy (Likelihood of Recommending Metro

Overall, KC Metro has an overall advocacy score of –19—that is more residents would not recommend riding that would recommend riding to others.

Metro's overall advocacy score is strongly influenced by ridership. Among Riders, Metro's advocacy score is positive while among Non-Riders it is negative.

It is noteworthy that Metro's overall advocacy score is identical for Moderate Regular and Infrequent Riders.

	All Residents	All Riders	Regular Riders	Frequent RR	Moderate RR	Infrequent Riders	Non-Riders
Overall Score*	-19	28	34	42	16	16	-38
Advocates (9 – 10)	26%	47%	50%	54%	41%	41%	18%
Passives (7 – 8)	29%	34%	35%	35%	34%	34%	27%
Detractors (0 – 6)	45%	19%	16%	12%	25%	25%	56%

* Overall score is computed by subtracting percentage of advocates from percentage of detractors

Environmental Impact

Questions were included in 2011 to assess the environmental impacts if Metro was not available.

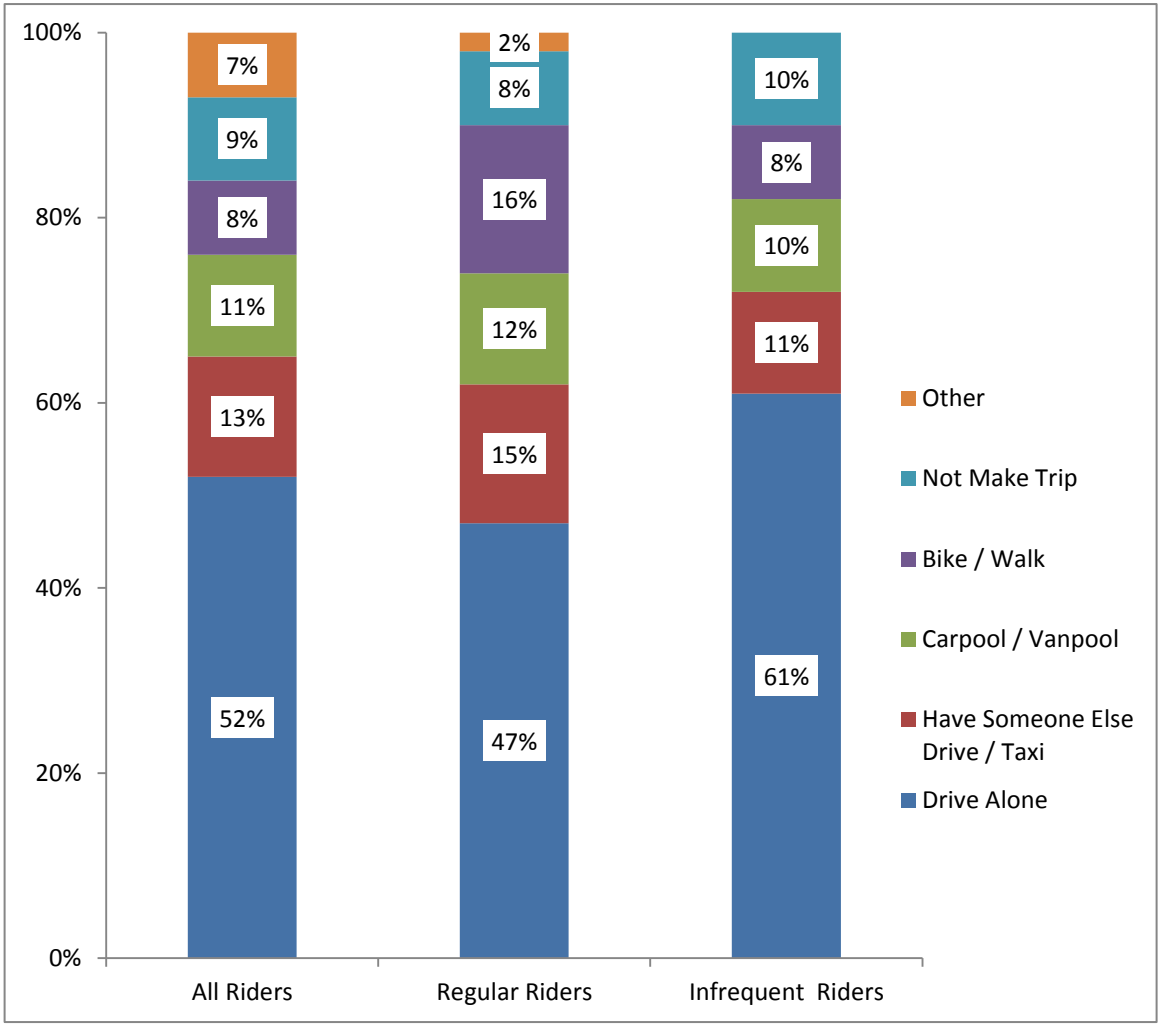
Figure 79: Mode Choice if Transit Not Available

When asked what they would do if public transportation were not available, more than half of all Riders said they would drive.

This was true for both Regular and Infrequent Riders, although Infrequent Riders were more likely than Regular Riders to say they would drive.

Riders living in East King County and, to a lesser extent, Seattle / North King County were more likely than those living in South King County to say they would drive. Those living in South King County were more likely to say they would carpool or vanpool or not make the trip at all.

	Seattle / N King	South King	East King
Drive Alone	**52%**	41%	**67%**
Have Someone Else Drive / Taxi	12%	18%	9%
Carpool / Vanpool	9%	15%	14%
Bike / Walk	10%	7%	3%
Not Make Trip	9%	14%	5%
Other	8%	5%	2%



ENV1 - If public transportation were not available for the trip(s) you usually take, how would you make that trip?
***Base**: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Three out of four riders have a vehicle available that they could use to make their primary trip.

- Infrequent Riders are significantly more likely than Regular Riders to have a car available; however, the majority of Regular Riders have a vehicle.

	All Riders	Regular Riders	Infrequent Riders
Have Vehicle Available	74%	68%	**84%**

- Riders living in East King County are the most likely to have a vehicle available for their primary trip.

	Seattle / N. King	South King	East King
Have Vehicle Available	72%	67%	**88%**

ENV3 - Do you have a car or other motorized vehicle that you could have used to make your primary trip?
***Base**: All Regular and Infrequent Riders (n_{2011} = 1,455)*

One out of three Regular Riders suggest that they would purchase at least one vehicle if transit was not available for their primary trip.

	All Riders	Regular Riders	Infrequent Riders
Would Purchase at Least One Vehicle	27%	**33%**	18%

ENV2 - If public transportation were not available, would your household change the number of vehicles it owns?
***Base**: All Regular and Infrequent Riders (n_{2011} = 1,455)*

Information Sources

Opportunities to communicate with customers have increased significantly over the past several years with access to customer databases of those willing to be reached via text messages as well as the introduction of websites and mobile APPS. As a result, questions have increasingly focused on identifying customer awareness and use of the vast array of communications channels. In addition, questions were added this year to assess the effectiveness of these channels.

Figure 80: Awareness and Use of Information Sources

Traditional information sources—information at bus stops, transit centers, park-and-ride lots and printed timetables—continue to be an important source of information for Metro customers.

Metro's website and the regional trip planner are also widely used. However, awareness of the regional trip planner is significantly lower than Metro Online.

- Satisfaction with Metro Online is high and consistent with previous years.

Google's Trip Planner is by far the most used third-party information source.

- Google Trip Planner use is equivalent to the Regional Trip Planner. Moreover, users are more satisfied with Google's Trip Planner than the Regional Trip Planner—notably 56% of Google Trip Planner users are very satisfied compared with 45% of Regional Trip Planner users.

Awareness of Metro's alert services is relatively low.

While awareness of e-mail and text messaging alerts is similar, twice as many customers prefer e-mail over text messages.

- While total satisfaction is higher among text message users than e-mail users, the percentage very satisfied is higher among e-mail alert users (45%) than text message users (40%).

Information Source	% Aware	% Use (of those Aware)	% Satisfied
Information at bus stops	79%	76%	n.a.
Printed timetables	72%	75%	n.a.
Metro Online	69%	76%	87%
Information at transit centers or at park and ride lots	67%	66%	n.a.
Google's Trip Planner	58%	74%	94%
Regional Trip Planner	54%	77%	87%
Rider Information telephone line	37%	49%	n.a.
RideshareOnline.com	36%	22%	77%
'Bus time'	35%	43%	n.a.
Metro tracker website	30%	52%	79%
OneBusAway	21%	58%	91%
Metro alerts via e-mail	20%	24%	77%
Metro alerts via text messaging	19%	12%	85%
SeattleBus App	15%	28%	71%
Metro's Twitter page	13%	15%	57%
Metro alerts on home telephone	11%	15%	74%
Eye on Your Metro Commute	7%	26%	89%
Website other than Metro's	6%	85%	95%
Estately.com	3%	30%	79%

Appendix—2011 Metro Rider / Nonrider Questionnaire

NOTATIONS

- Everything written in questions and response categories that are in standard upper / lowercase type are read as written to the respondent.
- Response categories in upper case type only are not read to the respondent.
- Text in [ALLCAPS SURROUNDED BY BRACKETS] are interviewer and CATI programming instructions, not read to respondents
- (Response options in parenthesis) are read to respondents as necessary
- Response options in ***bold italics*** are post-coded responses created from open-end or other-specify questions

INTRODUCTION

DIMNET Hello, this _____ from ORC International calling on behalf of King County Metro Transit. We are conducting a county-wide planning study for Metro Transit and would like to include the opinions of your household.

INTROBASE [BASE SAMPLE TYPE 2 (BASE), 4 (LOW-INCOME), 5 (PRE-TEST)]

Hello, this is _____ from ORC International calling on behalf of King County Metro Transit. We are conducting a county-wide planning study for Metro Transit and would like to include the opinions of your household.

The information will be used to help improve the region's transportation system. This study is being conducted for research purposes only, and this call may be monitored or recorded for quality control purposes. Let me assure you that this is not a sales call and everything you say will be kept strictly confidential.

[AS NEEDED: This survey will provide important planning data that will help King County Metro improve the region's transportation system, so your participation is very important. This survey will last approximately 10 to 15 minutes.]

[PROBE ALL FINAL REFUSALS: Please, it would be really helpful if I could ask you just a couple of quick questions from the survey."]

1 RESPONDENT AVAILABLE CONTINUE
2 SPANISH SPEAKING HH
3 OTHER LANGUAGE SPEAKING HH
4 IMMEDIATE/SOFT REFUSAL – CALLBACK TO REFUSAL CONVERT
5 FINAL REFUSAL – MINI SURVEY (REFUSAL)

INTRO RIDER [RIDER SAMPLE TYPE 3]

Hello, this is _____ from ORC International calling on behalf of King County Metro Transit. We are conducting a county-wide planning study for Metro Transit and would like to include the opinions of your household.

The information will be used to help improve the region's transportation system. This study is being conducted for research purposes only, and this call may be monitored and/or recorded for quality control purposes. Let me assure you that this is not a sales call and everything you say will be kept strictly confidential.

For this survey I would like to speak with a member of this household who is 16 years of age and older and has ridden on the King County Metro Transit System, including the South Lake Union Street Car, **5 or more times** in the last 30 days, Would that be you or someone else in your household? **[ASK TO SPEAK TO RIDER]** IF NO REGULAR RIDER, THEN SAY: I have just a couple questions for you then?

[AS NEEDED: This survey will provide important planning data that will help King County Metro improve the region's transportation system, so your participation is very important. This survey will last approximately 10 to 15 minutes.]

[IF RIDER UNAVAILABLE, SCHEDULE CALL-BACK]

1 REGULAR RIDER AVAILABLE
2 SPANISH SPEAKING HH
3 OTHER LANGUAGE SPEAKING HH
4 NO REGULAR RIDER IN THE HOUSEHOLD – **ASK SCR1, SCR1A, SCR1B, SCR2, SCR3, SCR4A/B, SCR5A/B, SCR9A, SCR9B, SCR10, THEN NQ NON-RIDER**
5 IMMEDIATE/SOFT REFUSAL – CALLBACK TO REFUSAL CONVERT
6 FINAL REFUSAL – MINI SURVEY (REFUSAL)

INTRO CELL [CELL SAMPLE TYPE 1]

Hello, this is _____ from ORC International calling on behalf of King County Metro Transit. We are conducting a county-wide planning study for Metro Transit and would like to include the opinions of your household.

The information will be used to help improve the region's transportation system. This study is being conducted for research purposes only, and this call may be monitored and/or recorded for quality control purposes. Let me assure you that this is not a sales call and everything you say will be kept strictly confidential.

First of all, are you currently driving? IF YES: When is a more convenient time to call you back?

For this survey I would like to speak with someone who is 16 years of age and older? Would that be you?

[AS NEEDED: This survey will provide important planning data that will help King County Metro improve the region's transportation system, so your participation is very important. This survey will last approximately 10 to 15 minutes.]

1 CONTINUE – NOT DRIVING
2 SPANISH SPEAKING HH
3 OTHER LANGUAGE SPEAKING HH
4 NO ONE 16 YEARS OF AGE OR OLDER– NQ AGE
5 IMMEDIATE/SOFT REFUSAL – [CALLBACK TO REFUSAL CONVERT]
6 FINAL REFUSAL – MINI SURVEY [REFUSAL]

MINI SURVEY
[FOR FINAL REFUSALS WHO WILL ANSWER A FEW QUESTIONS]

REF It would be really helpful if I could just ask you a couple of quick questions from the survey

REF1 First, are you a resident of King County?

1 YES
2 NO [SKIP TO THANK2]
8 DON'T KNOW [SKIP TO THANK8]
9 REFUSED [SKIP TO THANK8]

REF2 Including yourself, how many people in your household, age 16 or over, have taken at least 5 one-way rides on a Metro bus **or** the South Lake Union Street Car in the last 30 days?

A round trip counts as two rides, and do not count rides entirely within the downtown Seattle Ride Free Area.

[AS NEEDED] The Ride Free Area extends from the north at Battery St. to S. Jackson St. on the south, and east at I-5 to the waterfront on the west. Riders do not pay a fare when riding within this area between 6 a.m. and 7 p.m. daily.]

___ ENTER NUMBER OF RIDERS IN HOUSEHOLD [IF 0, 9 SKIP TO REF6]
8 8 OR MORE
9 DK / REF

REF3 [IF REF2 GE 1 AND REF2 LE 8] In the last 30 days, how many one-way rides have **you personally** taken on a Metro bus **or** the South Lake Union Streetcar?

[IF NECESSARY: The Ride Free Area extends from the north at Battery St. to S. Jackson St. on the south, and east at I-5 to the waterfront on the west. Riders do not pay a fare when riding within this area between 6 a.m. and 7 p.m. daily.]

1 YES, 5 OR MORE RIDES (Metro) - RIDER [SKIP TO REF6]
2 YES, 5 OR MORE RIDES (Streetcar) – RIDER [SKIP TO REF6]
3 NO, 1 TO 4 RIDES (Metro) - INFREQUENT RIDER [SKIP TO REF6]
4 NO, 1 TO 4 RIDES (Streetcar) - INFREQUENT RIDER [SKIP TO REF6]
5 NO, 0 RIDES / NEVER RIDE (Metro) - NONRIDER [SKIP TO REF6]
6 NO, 0 RIDES / NEVER RIDE (SLUSC) - NONRIDER [SKIP TO REF6]
9 DK / REF

REF4 [IF REF3 = 9] Would that be more than 4 rides?

1 YES, 5 OR MORE RIDES (Metro) - RIDER
2 YES, 5 OR MORE RIDES (Streetcar) – RIDER
3 NO, 1 TO 4 RIDES (Metro) - INFREQUENT RIDER
4 NO, 1 TO 4 RIDES (Streetcar) - INFREQUENT RIDER
5 NO, 0 RIDES / NEVER RIDE (Metro) - NONRIDER
6 NO, 0 RIDES / NEVER RIDE (SLUSC) - NONRIDER
9 DK / REF [SKIP TO THANK8]

REF6 [LANDLINE SAMPLE] To verify, is your home zip code [RECALL ZIP CODE FROM SAMPLE]?

1 YES
2 NO
9 DK/REF [SKIP TO THANK8]

REF7 [IF REF6 = 2 OR CELLPHONE SAMPLE] What is your correct zip code?

_____ ENTER CORRECT ZIP CODE
99999 DON'T KNOW [SKIP TO THANK8]

REF9 Including yourself, how many people in your household are 16 and older?

____ ENTER NUMBER OF PERSONS IN HOUSEHOLD
8 8 OR MORE
9 DON'T KNOW / REFUSED [SKIP TO THANK8]

REF13 [IF RIDESTAT = 1] You do qualify for the study we are conducting, and the input of people like yourself is very valuable. The information you give will be used to improve your area's transit system. We would really like to continue the rest of the survey with you. It should only take about 15 minutes.

1 YES, WILL PARTICIPATE NOW [SKIP TO SCR1]
2 YES, WILL PARTICIPATE LATER [SKIP TO THANK3]
3 NO, WILL NOT PARTICIPATE FURTHER [SKIP TO THANK5]

SCREENER

SCR1 [SKIP IF REF1=1] First, are you a resident of King County?

1 YES
2 NO [SKIP TO THANK2]
8 DON'T KNOW [SKIP TO THANK8]
9 REFUSED [SKIP TO THANK8]

SCR1A [SKIP IF REF13=1] Including yourself, how many live in your household who are 16 years of age or older?

_____ ENTER NUMBER OF PERSONS 16+ IN HOUSEHOLD
8 8 OR MORE
9 DON'T KNOW / REFUSED [SKIP TO THANK8]

SCR1B [IF SCR1A=1 OR REF9=1] Just to confirm, you are the only resident in your household 16 or older?

1 YES –SKIP TO SCR4
2 NO [RETURN TO SCR1A AND REASK]
8 DON'T KNOW [SKIP TO THANK8]
9 REFUSED [SKIP TO THANK8]

SCR2 [IF SCR1A GT 1 OR REF9>1] Including yourself, how many people in your household, age 16 years of age or older, have taken at least 1, one-way ride on a **Metro Bus or the South Lake Union Street Car** in the last 30 days?

Do not count rides taken entirely within the downtown Seattle Ride Free Area.

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

[IF NECESSARY: The Ride Free Area extends from the north at Battery St. to S. Jackson St. on the south, and east at I-5 to the waterfront on the west. Riders do not pay a fare when riding within this area between 6 a.m. and 7 p.m. daily.]

____ ENTER NUMBER OF RIDERS IN HOUSEHOLD
8 OR MORE
9 DON'T KNOW / REFUSED [SKIP TO THANK8]

[PROGRAMMING NOTE: IF "INTRO RIDER" = 2 (I.E.NONRIDER IN THE RIDER SAMPLE), THEN SKIP SCR3 AND AUTO INSERT SCR3=0 SINCE SAME QUESTION WAS ASKED IN "INTRO RIDER"]

SCR3 [IF SCR2 GT 0 AND SCR1A GT 1 SKIP IF REF13=1 OR REF13=2] Including yourself, how many people in your household, age 16 years of age or older, have taken **at least 5** one-way rides on a **Metro Bus** or the **South Lake Union Street** Car in the last 30 days?

[IF NECESSARY: Do not count rides taken entirely within the downtown Seattle Ride Free Area.

[IF NECESSARY: A round trip counts as two one-way rides. A trip where you had to transfer counts as one ride.

[IF NECESSARY: The Ride Free Area extends from the north at Battery St. to S. Jackson St. on the south, and east at I-5 to the waterfront on the west. Riders do not pay a fare when riding within this area between 6 a.m. and 7 p.m. daily.]

_____ ENTER NUMBER OF REGULAR RIDERS IN HOUSEHOLD
8 8 OR MORE
9 DON'T KNOW / REFUSED

SCR3A [IF REGULAR RIDER>1] To obtain a representative sample of all riders in the area, I need to speak to the male rider in your household who is 16 years of age and older who has taken **at least 5** one-way rides on a **Metro Bus** or the **South Lake Union Street** Car in the last 30 days Would that be you?

[INTERVIEWING NOTE: IF MALE UNAVAILABLE, SCHEDULE CALL-BACK; IF NO MALE IN THE HOUSEHOLD, ASK FOR YOUNGEST FEMALE]

1 CONTINUE WITH CURRENT RESPONDENT
2 NEW RESPONDENT AVAILABLE [SKIP TO SCR3D]
3 NEW RESPONDENT NOT AVAILABLE [SCHEDULE CALLBACK]

SCR3B [IF INFREQUENT RIDER>1] To obtain a representative sample of all people in the area, I need to speak to the male in your household who is 16 years of age and older who has taken at least 1, one-way ride on a **Metro Bus or the South Lake Union Street Car** in the last 30 days? Would that be you?

[INTERVIEWING NOTE: IF MALE UNAVAILABLE, SCHEDULE CALL-BACK; IF NO MALE IN THE HOUSEHOLD, ASK FOR YOUNGEST FEMALE]

1 CONTINUE WITH CURRENT RESPONDENT
2 NEW RESPONDENT AVAILABLE [SKIP TO SCR3D]
3 NEW RESPONDENT NOT AVAILABLE [SCHEDULE CALLBACK]

SCR3C [IF NONRIDER HH] To obtain a representative sample of all people in the area, I need to speak to the [male/youngest] person in your household who is 16 years of age and older. Would that be you?

[INTERVIEWING NOTE: IF MALE UNAVAILABLE, SCHEDULE CALL-BACK; IF NO MALE IN THE HOUSEHOLD, ASK FOR YOUNGEST FEMALE]

1 CONTINUE WITH CURRENT RESPONDENT
2 NEW RESPONDENT AVAILABLE [SKIP TO SCR3D]
3 NEW RESPONDENT NOT AVAILABLE [SCHEDULE CALLBACK]

SCR3D [CALLBACK INTRO] Hello, this is_____ from ORC International calling on behalf of King County Metro Transit. We are conducting a county-wide planning study for Metro Transit and would like to include the opinions of your household.)

SCR4A [SKIP IF REF13=1 OR REF13=2 OR SCR2=0] Thinking about the last 30 days, how many **one-way rides** have **you** taken on a **Metro bus** , not counting rides entirely within the downtown Seattle Ride Free Area?

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

[IF NECESSARY: The Ride Free Area extends from the north at Battery St. to S. Jackson St. on the south, and east at I-5 to the waterfront on the west. Riders do not pay a fare when riding within this area between 6 a.m. and 7 p.m. daily.]

_____ ENTER NUMBER OF RIDES
97 97 OR MORE
98 DON'T KNOW
99 REFUSED

SCR5A [IF SCR4 GE 98 SKIP IF REF13=1 OR REF13=2] Would that be more than 4 rides on a Metro Bus?

1 YES, 5 OR MORE RIDES - RIDER [SKIP TO SCR8A]
2 NO, 1 TO 4 RIDES - INFREQUENT RIDER
3 NO, 0 RIDES / NEVER RIDE - NONRIDER
9 DON'T KNOW / REFUSED

SCR4B [SKIP IF REF13=1 OR REF13=2 OR SCR2=0] Thinking about the last 30 days, how many **one-way rides** have **you** taken on **the South Lake Union Street Car**?

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

_____ ENTER NUMBER OF STREETCAR RIDES
97 97 OR MORE
98 DON'T KNOW
99 REFUSED

SUM OF METRO RIDES AND SOUTH LAKE UNION STREET CAR RIDES USED TO DETERMINE RIDER STATUS.

SCR5B [IF SCR4B GE 98 SKIP IF REF13=1 OR REF13=2] Would that be more than 4 rides on the South Lake Union Street Car?

1 YES, 5 OR MORE RIDES (SLUSC) – RIDER
2 NO, 1 TO 4 RIDES (SLUSC) - INFREQUENT RIDER
3 NO, 0 RIDES / NEVER RIDE (SLUSC) - NONRIDER
9 DK / REF [SKIP TO THANK8]

USE BUS AND STREETCAR TO DETERMINE RIDER STATUS.
CREATE VARIABLE = RIDERMODE:

1 BUS ONLY
2 STREETCAR ONLY
3 BOTH BUS AND STREETCAR]

SCR6 [IF SCR3 GE 1 AND [(SCR4 LT 5) OR (SCR5 = 2 OR 3) SKIP IF REF13=1 OR REF13=2] Is the member in your household who has taken at least 5 one-way rides on Metro **or** the South Lake Union Street Car in the last 30 days available at this time to complete a survey?

1 YES, AVAILABLE
2 NO, NOT AVAILABLE FOR STUDY DURATION, CONTINUE [SKIP TO SCR8A]
3 NO, NOT AVAILABLE NOW [ARRANGE CALLBACK - CRTL-END]

SCR8A [ASK IF RIDESTAT = 1 OR 2] What bus routes do you take most often? [ACCEPT UP TO 3 ROUTES] [AS NEEDED: Include all routes including Metro, Sound Transit, Pierce Transit, and Community Transit.]
[PROBE: The one(s) you use most often.]

1 ROUTE 1 [SPECIFY NUMBER OR NAME]
2 ROUTE 2 [SPECIFY NUMBER OR NAME]
3 ROUTE 3 [SPECIFY NUMBER OR NAME]
4 NONE/STREETCAR ONLY
9 DON'T KNOW / REFUSED

CREATE VARIABLE = RIDESTAT

1 **REGULAR RIDER** – IF REF3<=2 OR REF4<=2 OR (SUM OF SCR4A+SCR4B>=5) OR (SCR5A=1 OR SCR5B=1) OR (SUM OF SCR7A1+SCR7A2>=5) OR (SCR7B1=1 OR SCR7B2=1)
2 **INFREQUENT RIDER** - IF REF3=3 OR 4 OR REF4=3 OR 4 OR (SUM OF SCR4A+SCR4B=1-4) OR (SCR5A=2 OR SCR5B=2) OR (SUM OF SCR7A1+SCR7A2=1-4) OR (SCR7B1=2 OR SCR7B2=2).
3 **NONRIDER** – IF REF3=5 OR 6 OR REF4=5 OR 6 OR SCR2=0 OR SCR3=0 OR (SUM OF SCR4A+SCR4B=0) OR (SCR5A=3 AND SCR5B=3) OR (SCR7B1=3 AND SCR7B2=3)

IF CANNOT DETERMINE HOUSEHOLD RIDER STATUS, SKIP TO THANK8

SCR9A [SKIP IF REF13=1 OR REF13=2 AND LANDLINE SAMPLE] To verify, is your home zip code [RECALL ZIP CODE FROM SAMPLE]?

1 YES
2 NO
9 DK/REF [SKIP TO THANK8]

SCR9B [IF SCR9A = 2 OR CELLPHONE SAMPLE] What is your correct zip code?

_____ ENTER CORRECT ZIP CODE
99999 DON'T KNOW [SKIP TO THANK8]

CREATE VARIABLE = ZONE (DEFINED BY ZIP CODE)

Seattle / North King (1)	South King (2)	East King (3)
98101 98102 98103 98104 98105 98106 98107 98108 98109 98112 98115 98116	98001 98002 98003 98010 98022 98023 98025 98030 98031 98032 98035 98038	98004 98005 98006 98007 98008 98009 98011 98014 98015 98019 98024
98117 98118 98119 98121 98122 98124 98125 98126 98133 98134 98136 98144	98042 98045 98047 98051 98054 98055 98056 98057 98058 98059 98062 98063 98064	98027 98028 98029 98033 98034 98039 98040 98041 98050 98052 98053 98065
98145 98154 98155 98160 98164 98177 98181 98185 98191 98195 98199	98070 98071 98092 98093 98138 98146 98148 98158 98166 98168 98178 98188 98198 98354	98072 98074 98075 98077 98083 98224 98288

CREATE VARIABLE = RIDEAREA

1 RIDER – SEATTLE/NORTH KING (RIDESTAT = 1 AND ZONE = 1)
2 INFREQUENT RIDER/NONRIDER – SEATTLE / NORTH KING (RIDESTAT GE 2 AND ZONE = 1)
3 RIDER – SOUTH KING (RIDESTAT = 1 AND ZONE = 2)
4 INFREQUENT RIDER/NONRIDER – SOUTH KING (RIDESTAT GE 2 AND ZONE = 2)
5 RIDER – EAST KING (RIDESTAT = 1 AND ZONE = 3)
6 INFREQUENT RIDER/NONRIDER – EAST KING (RIDESTAT GE 2 AND ZONE = 3)

SCR10 ENTER GENDER OF RESPONDENT [VERIFY IF NEEDED BY ASKING:] This may sound silly, but I'm required to ask. Are you…

1 MALE
2 FEMALE

EMO2 To ensure this study is representative can I get your age?

__ AGE
99 REFUSED

DEMO2A [ASK IF: DEMO2 = 99] Would that be....

1 16-17
2 18-19
3 20-24
4 25-34
5 35-44
6 45-54
7 55-64
8 65 or Older
9 REFUSED

DEMO5 [ASK IF SAMP_TYPE=4] Is your total annual household income above or below $35,000 per year?

[INTERVIEWER NOTE: If they say they make exactly $35,000 choose above $35,000 per year – Option 2]

1 BELOW $35,000 PER YEAR
2 ABOVE $35,000 PER YEAR [SKIP TO DEMO5B]
8 DK - PROBE FOR BEST ESTIMATE [SCREENER REFUSAL]
9 REFUSED [SCREENER REFUSAL]

TELUSE2 [ASK IF CELL PHONE SAMPLE] In addition to your cell phone, is there at least one telephone line inside your home that is currently working and is not a cell phone? Do not include telephones only used for business or telephones only used for computers or fax machines.

1 YES
2 NO [CELL PHONE ONLY]
8 DON'T KNOW/NOT SURE [SCREENER REFUSAL]
9 REFUSED [SCREENER REFUSAL]

TELUSE3 [ASK IF TELUSE2 = 1] Of all the telephone calls that you receive, are. . .

[READ LIST. RECORD ONE ANSWER]

1 All or almost all calls received on a cell phone [CELL PHONE PRIMARILY]
2 Some received on a cell phone and some on a regular landline phone [EQUAL USER]
3 Very few or none received on a cell phone [LANDLINE PRIMARILY]
8 DON'T KNOW/NOT SURE [EQUAL USER]
9 REFUSED [SCREENER REFUSAL]

TERMINATE CELL PHONE SAMPLE IF LANDLINE PRIMARILY (TELUSE3=3)

CREATE VARIABLE = PHONEUSE

1 CELL PHONE ONLY (TELUSE2 = 2)
2 CELL PHONE PRIMARILY (TELUSE3 = 1)
3 BOTH EQUALLY (TELUSE3 = 2 OR 8)
4 LANDLINE PRIMARILY (TELUSE3 = 3)
5 LANDLINE ONLY (TELUSE1 = 2)

GENERAL RIDERSHIP – ALL RESPONDENTS

GEN1 Were you living in King County one year ago?

1 YES
2 NO
9 DON'T KNOW / REFUSED

GEN2 Are you currently… [ACCEPT MULTIPLE RESPONSES]
[IF A STUDENT ONLY, PROBE: Do you also work?]

[IF A WORK ONLY, PROBE: Do you also attend classes?]

1 Employed/Self-Employed, [ASK GEN2A]
2 A student, [ASK GEN2B]
3 A homemaker, [COMMUTER = 3]
4 Retired, or [COMMUTER = 3]
5 Currently not employed? [COMMUTER = 3]
6 OTHER [SPECIFY] [SKIP TO Q3]
7 DISABLED [COMMUTER = 3]
8 DON'T KNOW [COMMUTER = 3]
9 REFUSED [COMMUTER = 3]

GEN2A [IF GEN2=1] Are you employed…

1 Full-time,
2 Part-time,
3 Or are you self-employed?
8 DON'T KNOW
9 REFUSED

GEN2B [IF GEN2=2] Are you a…

1 A full-time student or
2 A part-time student?
8 DON'T KNOW
9 REFUSED

GEN2C [IF EMPLOYED AND A STUDENT (GEN2=1 AND GEN2=2)] Which do you consider to be your primary activity?

1 Employed
2 A student
8 DON'T KNOW
9 REFUSED

GEN3 [IF GEN2 EQ 1 OR GEN2C EQ 1] How many days a week do you [work]?
[IF GEN2 EQ 2 OR GEN2C EQ 2] How many days a week do you [attend school]?

PROGRAMMER NOTE: IF GEN2C = 8 OR 9 (DK OR REF):
ASK "WORK" QUESTION IF EMPLOYED F/T (GEN2A=1 OR 3) AND SCHOOL P/T (GEN2B=2, 8, OR 9)
ASK "SCHOOL" QUESTION IF EMPLOYED P/T (GEN2A = 2, 8, OR 9) AND SCHOOL F/T (GEN2B=1)
IF EQUAL OR UNDETERMINED, THEN ASK "WORK" QUESTION

_____ ENTER NUMBER OF DAYS
0 [COMMUTER = 3]
8 DON'T KNOW
9 REFUSED

GEN4 [IF GEN3 > 0 AND (GEN2 EQ 1 OR GEN2C EQ 1)] How many days a week do you travel to work, that is, **you work outside your home?**
[IF GEN3 > 0 AND (GEN2 EQ 2 OR GEN2C EQ 2)] How many days a week do you travel to school, that is, **you attend class outside your home?**

_____ ENTER NUMBER OF DAYS
0 TELEWORK / ALWAYS WORK FROM HOME [COMMUTER = 3]
8 DON'T KNOW [COMMUTER =3]
9 REFUSED [COMMUTER = 3]

CREATE VARIABLE = COMMUTER

3-7 DAYS/WEEK WORK [COMMUTER = 1]
3-7 DAYS/WEEK SCHOOL [COMMUTER = 2]
0-2 DAYS/WEEK WORK [COMMUTER = 3]
0-2 DAYS/WEEK SCHOOL [COMMUTER = 3]
TELEWORK / ALWAYS WORK FROM HOME [COMMUTER = 3]
DON'T KNOW [COMMUTER =3]
REFUSED [COMMUTER = 3]

GEN5 [IF GEN4 GE 1 AND (GEN2 EQ 1 OR GEN2C EQ 1)] Of the [RESTORE ANSWER TO GEN4] days that you travel to work, how many days do you take a Metro bus or the South Lake Union Streetcar as part of that commute?

[IF GEN4 GE 1 AND (GEN2 EQ 2 OR GEN2C EQ 1)] Of the [RESTORE ANSWER TO GEN4] days that you travel to school, how many days do you take a Metro bus or the South Lake Union Street as part of that commute?

____ ENTER NUMBER OF DAYS
8 DON'T KNOW
9 REFUSED

METRO RIDERSHIP – ALL RIDERS / INFREQUENT RIDERS
[ASK IF RIDESTAT = 1 OR 2; OTHERWISE SKIP TO NON2]

MET1A [ASKIF: RIDERMODE= 1 OR 3] Did you start riding the **bus** after September of 2010?

1 YES - AFTER
2 NO - BEFORE
9 DON'T KNOW / REFUSED

MET1 [ASKIF: RIDERMODE= 1 OR 3] How long have you been riding Metro **buses**? [READ LIST IF NECESSARY] [SHOW RESPONSES BASED ON ANSWER TO MET1A]

1 (Less than 3 Months)
2 (3 to 6 Months)
3 (6 Months to 9 Months)
4 (9 Months to 1 Year)
5 (1 to 2 Years)
6 (3 to 5 years)
7 (5 Years or More)
9 DON'T KNOW / REFUSED

MET1B SO TO CONFIRM, YOU STARTED RIDING [ASKIF MET1A=1 (AFTER SEPT) AND MET1=6 OR 7 (3 OR MORE)] **BEFORE** / [ASKIF MET1A=2 (BEFORE SEPT) AND MET1<6 (1 TO 2 YRS OR LESS)] **AFTER** SEPTEMBER 2010?"

1 AFTER SEPTEMBER 2010
2 BEFORE SEPTEMBER 2010
9 DON'T KNOW / REFUSED

MET4 [ASKIF: RIDERMODE= 1 OR 3] To what extent do you use the **bus** to get around? Would you say you use **the bus** for…

1 All of your transportation needs,
2 Most of your transportation needs
3 Some of your transportation needs, or
4 Very little of your transportation needs?
8 DON'T KNOW
9 REFUSED

MET5 [ASKIF: RIDERMODE= 1 OR 3] When you ride **the bus**, what is the primary purpose of the trip you take most often?
[IF RESPONDENT SAYS TO GET / GO DOWNTOWN PROBE: What is the purpose of the trip you take to Downtown? / What do you do Downtown?]

1 TO/FROM WORK ***/ BUSINESS / COMMUTING***
2 TO/FROM SCHOOL
3 TO/FROM VOLUNTEERING
4 SHOPPING / ERRANDS
5 APPOINTMENTS / DOCTOR VISITS

6 FUN / RECREATION / SOCIAL ***/ VISIT FRIENDS & FAMILY / SPORTING EVENTS***
7 SPECIAL EVENTS (SEAFAIR, BUMBERSHOOT SHUTTLES)
8 JURY DUTY
9 DOWNTOWN
10 AIRPORT
11 OTHER [SPECIFY]
98 DON'T KNOW / NO SINGLE PRIMARY PURPOSE
99 REFUSED

MET6 [ASKIF: RIDERMODE= 1 OR 3] During which of the following time periods do you ride **the bus**? Do you ride … [READ LIST AND WAIT FOR YES/NO RESPONSE]

1 YES
2 NO
9 DON'T KNOW/REFUSED

AA Weekday mornings before 6am

A Weekday mornings between 6:00 and 9:00 a.m.?

B Weekdays between 9:00 a.m. and 3:00 p.m.?

C Weekday afternoons between 3:00 and 6:00 p.m.?

D Weekday evenings between 6:00 and 7:00 p.m.?

E Weekday evenings after 7:00 p.m.?

F Any time on Saturday?

G Any time on Sunday?

MET1A1 [ASKIF: RIDER MODE= 2 OR 3] Did you start riding the **South Lake Union Streetcar** after September of 2010?

1 YES
2 NO
9 DON'T KNOW / REFUSED

MET1_1 [ASKIF: RIDER MODE= 2 OR 3] How long have you been riding the **South Lake Union Streetcar**? [READ LIST IF NECESSARY] [SHOW RESPONSES BASED ON ANSWER TO MET1A1]

1 (Less than 3 Months)
2 (3 to 6 Months)
3 (6 Months to 9 Months)
4 (9 Months to 1 Year)
5 (1 to 2 Years)
6 (3 Years or More)
9 DON'T KNOW / REFUSED

MET1A1B SO TO CONFIRM, YOU STARTED RIDING [ASKIF MET1A1=1 (AFTER SEPT) AND MET1=6 (3 OR MORE)] **BEFORE** / [ASKIF MET1A1=2 (BEFORE SEPT) AND MET1<6 (1 TO 2 YRS OR LESS)] **AFTER** SEPTEMBER 2010?"

1 AFTER SEPTEMBER 2010
2 BEFORE SEPTEMBER 2010
9 DON'T KNOW / REFUSED

MET4A [ASKIF: RIDERMODE= 2 OR 3] To what extent do you use the **streetcar** to get around? Would you say you use it for…

1 All of your transportation needs,
2 Most of your transportation needs
3 Some of your transportation needs, or
4 Very little of your transportation needs?
8 DON'T KNOW
9 REFUSED

MET5A [ASKIF: RIDER MODE= 2 OR 3] When you ride the **streetcar**, what is the primary purpose of the trip you take most often?
[IF RESPONDENT SAYS TO GET / GO DOWNTOWN PROBE: What is the purpose of the trip you take to Downtown? / What do you do Downtown?]

1 TO/FROM WORK ***/ BUSINESS / COMMUTING***
2 TO/FROM SCHOOL
3 TO/FROM VOLUNTEERING
4 SHOPPING / ERRANDS
5 APPOINTMENTS / DOCTOR VISITS
6 FUN / RECREATION / SOCIAL ***/ VISIT FRIENDS & FAMILY / SPORTING EVENTS***
7 SPECIAL EVENTS (SEAFAIR, BUMBERSHOOT SHUTTLES)
8 JURY DUTY
9 DOWNTOWN
10 AIRPORT
11 OTHER [SPECIFY]
98 DON'T KNOW / NO SINGLE PRIMARY PURPOSE
99 REFUSED

MET6A [ASKIF: RIDER MODE= 2 OR 3] During which of the following time periods do you ride the **Streetcar**? Do you ride … [READ LIST AND WAIT FOR YES/NO RESPONSE]

1 YES
2 NO
9 DON'T KNOW/REFUSED

AA Weekday mornings before 6am

A Weekday mornings between 6:00 and 9:00 a.m.?

B Weekdays between 9:00 a.m. and 3:00 p.m.?

C Weekday afternoons between 3:00 and 6:00 p.m.?

D Weekday evenings between 6:00 and 7:00 p.m.?

E Weekday evenings after 7:00 p.m.?

F Any time on Saturday?

G Any time on Sunday?

MET7 How many transfers do you usually make when you use the **bus or Streetcar** for your primary trip?

___ ENTER NUMBER OF TRANSFERS
8 VARIES DEPENDING ON THE BUS I TAKE
9 DON'T KNOW / REFUSED

METAA [IF MET7 EQ 1 AND LT 9] [READ LIST AND CHECK ALL THAT APPLY]

IF RIDERMODE =1		IF RIDERMODE =2		IF RIDERMODE =3	
[QUESTION TEXT] Does your typical trip involve a transfer between **a Metro bus** and…		[QUESTION TEXT] Does your typical trip involve a transfer between the **streetcar** and…		[QUESTION TEXT] Does your typical trip involve a transfer between…	
1	Another Metro bus	1	(FILTER OUT)	1	A Metro bus and another Metro bus
2	(FILTER OUT)	2	A Metro bus	2	A Metro bus and the streetcar
3	LINK Light Rail	3	LINK Light Rail	3	A Metro bus or the streetcar and LINK Light Rail
4	a Sound Transit bus	4	a Sound Transit bus	4	A Metro bus or the streetcar and a Sound Transit bus
5	Sounder Train	5	Sounder Train	5	A Metro bus or the streetcar and Sounder Train
6	Pierce Transit	6	Pierce Transit	6	A Metro bus or the streetcar and Pierce Transit
8	Community Transit	8	Community Transit	8	A Metro bus or the streetcar and Community Transit
10	WATER TAXI/PASSENGER-ONLY FERRY (DO NOT READ)	10	WATER TAXI/PASSENGER-ONLY FERRY (DO NOT READ)	10	A METRO BUS OR THE STREETCAR AND WATER TAXI/PASSENGER-ONLY FERRY (DO NOT READ)
7	OTHER [SPECIFY:_____]	7	OTHER [SPECIFY:_____]	7	OTHER [SPECIFY:_____]
9	DON'T KNOW/REFUSED	9	DON'T KNOW/REFUSED	9	DON'T KNOW/REFUSED

MET7A [IF MET7 EQ 1 AND LT 9] How many minutes do you usually wait for a **bus or Streetcar** when you transfer?

___ RECORD MINUTES
666 OVER ONE HOUR
888 DON'T KNOW
999 REFUSED

MET7B [IF MET7 GT 1 AND LT 9] How many minutes do you usually wait for your longest transfer?

___ RECORD MINUTES
666 OVER ONE HOUR
888 DON'T KNOW
999 REFUSED

USUAL BUS TRAVEL - ALL RIDERS / INFREQUENT RIDERS -- [RIDESTAT = 1 OR 2]

BUS1 [ASKIF: RIDERMODE = 1 OR 3] Do your **bus** trips usually cross the Seattle City limits, that is, are they two-zone trips?

1 YES
2 NO
8 DON'T KNOW
9 REFUSED

BUS2 How do you usually get from your home to your **bus** or **streetcar** stop?
[PROBE FOR ONE RESPONSE]

1 WALK TO A STOP NEAR MY HOME
2 COMES TO MY DOOR
3 DRIVE TO A PARK AND RIDE / TRANSIT CENTER
4 DRIVE AND PARK NEAR A STOP
5 BIKE
6 DROPPED OFF
7 TRAIN
8 FERRY
9 OTHER [SPECIFY:_____]
10 DON'T TAKE A BUS FROM HOME
11 ***CARPOOL***
88 DON'T KNOW
99 REFUSED

MET9 Do you **ever** get on or off within the downtown Seattle transit tunnel?

1 YES
2 NO
9 DON'T KNOW / REFUSED

ENVIRONMENTAL IMPACT - ALL RIDERS / INFREQUENT RIDERS
[RIDESTAT = 1 OR 2]

ENV1 If public transportation were not available for the trip(s) you usually take, how would you make that trip? [READ IF NECESSARY]

1 DRIVE ALONE
2 TAXI
3 WALK
4 BICYCLE
5 SOMEONE WOULD DRIVE ME
6 I WOULD NOT MAKE THIS TRIP
7 CARPOOL/RIDE WITH SOMEONE ELSE MAKING THIS TRIP
8 HAVE SOMEONE DRIVE ME WHO WOULDN'T MAKE THIS TRIP OTHERWISE
9 CHANGE LOCATION OF RESIDENCE/WORK
77 OTHER [SPECIFY:___]
99 DON'T KNOW/REFUSED

ENV3 Do you have a car or other motorized vehicle that you could have used to make your primary trip?

1 YES
2 NO
99 DON'T KNOW/REFUSED

ENV2 If public transportation were not available, would your household change the number of vehicles it owns?

1 YES—WOULD PURCHASE AT LEAST ONE VEHICLE
2 NO—WOULD NOT CHANGE THE NUMBER OF VEHICLES
99 DON'T KNOW/REFUSED

NON-RIDERS – [RIDESTAT EQ 3]

NON2 When was the last time you rode a **Metro bus** or the **South Lake Union Streetcar**? Was it...

1 Within the past 6 months
2 Six months to one year ago
3 Between 1 and 5 years ago, or
4 More than 5 years ago?
5 NEVER
9 DON'T KNOW/REFUSED

NON2A [IF NON2 LE3] When you rode the bus or streetcar, what was the primary purpose of the trip you took most often?

1 TO/FROM WORK
2 TO/FROM SCHOOL
3 TO/FROM VOLUNTEERING
4 SHOPPING / ERRANDS
5 APPOINTMENTS
6 FUN / RECREATION / SOCIAL
7 SPECIAL EVENTS (SPORTS, SEAFAIR, BUMBERSHOOT SHUTTLES)
8 JURY DUTY
9 DOWNTOWN
10 AIRPORT
11 OTHER [SPECIFY:_____]
98 DON'T KNOW / NO SINGLE PRIMARY PURPOSE
99 REFUSED

NON3 [IF NON2 EQ 1, 2, OR 3] What is the main reason you don't ride the bus or streetcar?
[IF: "I have a car / Car is convenient", PROBE: “Why is it more convenient?”]
[IF: "Problems with Schedule/Routing", PROBE: “What type of problems?”]

[PROBE FOR ONE RESPONSE]

1 CHANGED JOBS / MOVED
2 JOBSITE / BUSINESS MOVED
3 LOST JOB ***/ RETIRED***
4 CAR IS MORE CONVENIENT / LIKE DRIVING / HAVE A CAR (SPECIFY:_____)
5 NEED CAR FOR WORK / BEFORE OR AFTER WORK
6 WORK HOURS AREN'T REGULAR / FLEXIBLE ENOUGH
7 BUS TRAVEL TAKES TOO LONG
8 DISLIKE TRANSFERRING
9 PROBLEMS WITH BUS SCHEDULE / ROUTING (SPECIFY:_____)
10 DON'T LEAVE MY HOME / DON'T GO FAR FROM HOME / RETIRED
11 SERVICE NOT CLOSE TO HOME
12 TOO INCONVENIENT

13 WORK AT HOME / CLOSE TO MY HOME
14 BUS STOP TOO FAR
15 NO ROUTES WHERE I NEED TO GO
16 SCHEDULE IS INCONVENIENT
17 OTHER (SPECIFY:_____)
19 HAVE SMALL CHILDREN / HARD TO TRAVEL WITH CAR SEATS
20 BUS ATMOSPHERE / SMELL / BEHAVIOR OF OTHER PASSENGERS / ATMOSPHERE AT BUS STOP
21 NO NEED TO RIDE ANYMORE / DON'T GO DOWNTOWN / I FINISHED SCHOOL
99 DON'T KNOW / REFUSED

FARE PAYMENT - ALL RIDERS/INFREQUENT RIDERS -- [RIDESTAT = 1 OR 2]

FARE1 How do you usually pay your bus fare? Do you use...?

[READ ENTIRE LIST] [SELECT ALL THAT APPLY]

1 [An ORCA card [BLUE CARD, WHALE ON IT THAT I TAP]
2 Cash
3 Tickets or a Ticket book
4 A U-Pass, or Husky card
5 A Regional Reduced Fare Permit
8 FLEXPASS / PASSPORT (DO NOT READ) – IF THEY SAY THIS ASK "HAS YOUR FLEXPASS /PASSPORT BEEN MOVED TO AN ORCA CARD?" IF YES, CODE AS 1 (ORCA CARD)
9 METRO EMPLOYEE / COUNTY EMPLOYEE / COUNTY PASS
10 SENIOR PASS
77 OTHER (SPECIFY :_____) [PROBE: READ LIST TWICE BEFORE ACCEPTING]
88 DON'T KNOW
99 REFUSED

FARE1AB [ASK IF FARE1=5 (has RRFP)] Is your Regional Reduced Fare Permit…

1 an ORCA Card or [HAS A WHALE AND "ORCA" ON IT]
2 not an ORCA card
3 DON'TKNOW
4 REFUSED

OU5 [ASK IF: FARE1 = 1] Is your ORCA card …

1 An Adult card
2 A Youth card
3 A Regional Reduced Fare Permit
4 A UPASS or Husky Card
8 DON'T KNOW
9 REFUSED

FARE1A [ASK IF FARE1=10] Is your senior pass on an ORCA card?

1 YES
2 NO

OU7 [ASK IF: FARE1AB = 1 (RRFP on ORCA) or FARE1=1 (pays with ORCA OR FARE1A=1 (SENIOR PASS ON ORCA)) AND OU5<>4] What product or products do you have loaded on your ORCA card?

[SELECT ALL THAT APPLY]

1 A regional transit pass (DO NOT READ BUT CODE: SENIOR PASS) [IF NEEDED: This used to be called the Puget Pass]
2 An agency specific pass
3 An E-purse [IF NEEDED: Money on the card] / *MONEY / DEBIT CARD*
5 A passport or Flexpass
4 NOTHING
6 OTHER (SPECIFY:_____)
7 ***Employer provides - unknown if E-purse or passport***
71 ***Pass (unspecified)***
8 DON'T KNOW
9 REFUSED

OU8 [IF OU7 = 1, 2, OR 5 (region transit pass or agency specific pass OR PASSPORT on ORCA)] What is the maximum fare value on your pass? [READ LIST IF NEEDED]

2 ($.75) Senior/Disabled Fare
4 ($1.25) Youth Fare
8 ($2.25) / Metro Off-Peak Fare
9 ($2.50) / Metro 1-Zone Peak Fare
11 ($3.00) / Metro 2-Zone Peak Fare
15 I HAVE A FLEXPASS/PASSPORT
16 ***UNLIMITED / NO LIMIT***
77 OTHER (SPECIFY:_____)
98 DON'T KNOW [IF MY EMPLOYER PROVIDES AND I DON'T KNOW, CLASSIFY AS FLEXPASS/PASSPORT]
99 REFUSED

OU6 [ASK IF: OU7=1,2,3 OR 5 AND COMMUTER=1 or 2] Does your employer or school pay for part or all of your ORCA pass or E-purse? [IF YES: Would that be all ORCA costs or some? Would that be your school or your employer?]

1 (Yes, All paid for by school)
2 (Yes, All paid for by employer)
3 (Yes, Some paid for by school)
4 (Yes, Some paid for by employer)
5 (No, None paid for by school/employer)
8 DON'T KNOW
9 REFUSED

CASH1 [ASKIF: FARE1<>2, 4 OR 9 and OU5<>4] Do you ever use cash to pay for any portion of your fare?

1 YES
2 NO
8 DON'T KNOW
9 REFUSED

FARE3A [ASKIF: (FARE1AB=1 (RRFP ON ORCA) OR FARE=1 (PAYS WITH ORCA) OR FARE1A=1 (SENIOR PASS ON ORCA)) AND (OU7=4 (NOTHING LOADED ON ORCA) OR (FARE1=2 OR CASH1=1 (PAYS CASH OR SOMETIMES USES CASH))] Why do you pay cash instead of loading a pass or e-purse on your ORCA card?

1 CONCERNS ABOUT THEFT / LOSING THE CARD
2 COST TO REPLACE CARD IF LOST OR STOLEN
3 CONCERNS ABOUT PRIVACY
4 NO REAL ADVANTAGE COMPARED TO OTHER PAYMENT METHODS
5 LACK OF CONVENIENT PLACES TO PURCHASE CARD
6 LACK OF CONVENIENT PLACES TO RECHARGE CARD
8 DON'T REALLY UNDERSTAND HOW IT WORKS
9 PREFER WHAT I'M CURRENTLY USING
10 CONCERNS ABOUT THE $5 FEE TO PURCHASE THE CARD
11 HAVE TO APPLY FOR IT
12 DON'T KNOW ANYTHING ABOUT IT / WHERE TO GO TO GET IT
13 DON'T RIDE OFTEN ENOUGH
14 GET PASS THROUGH WORK OR SCHOOL
15 DON'T NEED IT (UNSPECIFIED)
16 HAVEN'T GOTTEN IT YET/ HAVEN'T HAD THE TIME TO GET ONE / LAZY
17 NO LONGER HAVE SUBSIDY FROM WORK/SCHOOL
18 PREFER TO PAY CASH
19 PASS EXPIRES BEFORE I GET A NEW ONE LOADED TO CARD
20 E-PURSE RUNS OUT BEFORE I GET MORE MONEY LOADED ON CARD
21 FORGET ORCA CARD
22 48 HOURS TO SHOW UP ON CARD IF PAY ONLINE
23 BEFORE I HAD ORCA CARD / JUST GOT CARD
24 EASIER TO PAY WITH CASH
95 I DON'T PAY CASH (MOST OF THESE ARE "NOTHING" LOADED ON ORCA CARD)
96 NOT ASKED (BEFORE QUESTIONNAIRE CHANGES)
97. OTHER [SPECIFY: _____]
98. DON'T KNOW
99. REFUSED

ORCA1 [ASK IF: FARE1 <> 1 OR 4 (NOT ORCA OR HUSKY) OR FARE1A=2 (SENIOR PASS NOT ON ORCA) OR FARE1AB=2 (RRFP NOT ON ORCA)] How familiar are you with the Orca card? Would you say you are....

4 Very familiar
3 Somewhat familiar
2 Not familiar
1 Not at all familiar
8 DON'T KNOW
9 REFUSED

[IF ORCA1 = 1 OR 2, READ] The ORCA card is a smart card used for paying transit fares. It costs $5.00 and can be purchased at Metro's Customer Assistance Office, Westlake Station Office, online, by mail, and at Ticket Vending Machines at Link and Sounder Stations. ORCA regional reduced fare permits for seniors and riders with disabilities cost $3.00 and must be purchased at a Metro Customer Assistance Office. A rider can load a pass or an electronic purse on the ORCA card that is valid for fare payment on Metro, Sound Transit and other transit agencies in the region.

NO2 [ASK IF: (ORCA1<>1 AND FARE1 <> 1 OR 4 (NOT ORCA OR HUSKY) OR FARE1A=2 (SENIOR PASS NOT ON ORCA) OR FARE1AB=2 (RRFP NOT ON ORCA))] Have you ever used or considered using an Orca card? [IF YES: Have you used or considered using it?]

1 YES, USED
2 YES, CONSIDERED
3 NO
8 DON'T KNOW
9 REFUSED

NO3 **[ASK IF: (ORCA1 EQ 3 OR 4 AND FARE1 <> 1 OR 4 (NOT ORCA OR HUSKY) OR FARE1A=2 (SENIOR PASS NOT ON ORCA) OR FARE1AB=2 (RRFP NOT ON ORCA)]** From what you have seen, read, heard about the ORCA program, would you be likely or unlikely to purchase an ORCA card in the future? Would that be very or somewhat likely / unlikely?

[ASKIF ORCA1 EQ 1 OR 2] Based on the description I just read, would you be likely or unlikely to purchase an ORCA card in the future? Would that be very or somewhat likely / unlikely?

1 VERY UNLIKELY
2 SOMEWHAT UNLIKELY
3 NEITHER UNLIKELY OR LIKELY
4 SOMEWHAT LIKELY
5 VERY LIKELY
8 DON'T KNOW
9 REFUSED

FARE3 [ASK IF: (ORCA1<>1 AND FARE1 <> 1 OR 4 (NOT ORCA OR HUSKY) OR FARE1A=2 (SENIOR PASS NOT ON ORCA) OR FARE1AB=2 (RRFP NOT ON ORCA)] Why don't you have an ORCA Card?

1. CONCERNS ABOUT THEFT / LOSING THE CARD
2. COST TO REPLACE CARD IF LOST OR STOLEN
3. CONCERNS ABOUT PRIVACY
4. NO REAL ADVANTAGE COMPARED TO OTHER PAYMENT METHODS
5. LACK OF CONVENIENT PLACES TO PURCHASE CARD

6. LACK OF CONVENIENT PLACES TO RECHARGE CARD
7. DON'T HAVE A CREDIT CARD OR DEBIT CARD
8. DON'T REALLY UNDERSTAND HOW IT WORKS
9. PREFER WHAT I'M CURRENTLY USING
10. CONCERNS ABOUT THE $5 FEE TO PURCHASE THE CARD
11. HAVE TO APPLY FOR IT
12. DON'T KNOW ANYTHING ABOUT IT / WHERE TO GO TO GET IT
13. DON'T RIDE OFTEN ENOUGH
14 GET PASS THROUGH WORK OR SCHOOL
15 DON'T NEED IT (UNSPECIFIED)
16 HAVEN'T GOTTEN IT YET/ HAVEN'T HAD THE TIME TO GET ONE / LAZY
17 NO LONGER HAVE SUBSIDY FROM WORK/SCHOOL
18 PREFER TO PAY CASH
19 EXPENSIVE / COST / CAN'T AFFORD (UNSPECIFIC)
95 I DO HAVE AN ORCA CARD
96 NOT ASKED (BEFORE QUESTIONNAIRE CHANGES)
97. OTHER [SPECIFY: _____]
98. DON'T KNOW
99. REFUSED

FARE3NEW [ASKIF: NO3=1 OR 2] Why are you unlikely to purchase an ORCA card?

1. CONCERNS ABOUT THEFT / LOSING THE CARD
2. COST TO REPLACE CARD IF LOST OR STOLEN
3. CONCERNS ABOUT PRIVACY
4. NO REAL ADVANTAGE COMPARED TO OTHER PAYMENT METHODS
5. LACK OF CONVENIENT PLACES TO PURCHASE CARD
6. LACK OF CONVENIENT PLACES TO RECHARGE CARD
7. DON'T HAVE A CREDIT CARD OR DEBIT CARD
8. DON'T REALLY UNDERSTAND HOW IT WORKS
9. PREFER WHAT I'M CURRENTLY USING
10. CONCERNS ABOUT THE $5 FEE TO PURCHASE THE CARD
11. HAVE TO APPLY FOR IT
12. DON'T KNOW ANYTHING ABOUT IT / WHERE TO GO TO GET IT
13 DON'T RIDE OFTEN ENOUGH
14 EASIER TO PAY WITH CASH / ORCA CARD TOO MUCH WORK
15 DON'T NEED IT
18 PREFER TO PAY CASH
19 EXPENSIVE / COST / CAN'T AFFORD (UNSPECIFIC)
95 I DO HAVE AN ORCA CARD
96 NOT ASKED (BEFORE CHANGES)
97. OTHER [SPECIFY: _____]
98. DON'T KNOW
99. REFUSED

FARE3B [ASKIF: FARE3 OR FARE3A OR FARE3NEW= 18] Why do you prefer to pay cash?

1 DON'T RIDE OFTEN ENOUGH
2 EASIER TO PAY WITH CASH / ORCA CARD TOO MUCH WORK
3 DON'T HAVE A CREDIT OR DEBIT CARD TO ADD VALUE TO CARD
4 CAN'T AFFORD TO PURCHASE A PASS
5 CAN'T AFFORD TO LOAD E-PURSE/MONEY ON CARD
6 CONCERNS ABOUT LOSING THE CARD
8 CONCERNS ABOUT SECURITY
7 OTHER [SPECIFY]
9 ***TOO EXPENSIVE / PAY LESS IF I PAY WITH CASH***
98 DON'T KNOW
99 REFUSED

CASH2 [ASK IF: **FARE1=2 OR CASH1=1 (PAYS CASH OR SOMETIMES USES CASH**] What would you do if cash were not accepted on Metro buses?

00 DRIVE
01 GET AN ORCA CARD OR
02 STOP RIDING METRO
03 RIDE METRO LESS OFTEN
04 BUY TICKETS
05 GET E-PURSE/ADD MORE VALUE TO ORCA CARD
06 START RIDING ANOTHER SYSTEM
07 OTHER (SPECIFY:)
08 DON'T KNOW
09 REFUSED

COMMUTE TRAVEL - ALL WORK AND STUDENT COMMUTERS -- [COMMUTER = 1 OR 2]

COMM1 In what geographic area do you... (work / attend school)? [READ LIST IN ENTIRETY BEFORE ACCEPTING RESPONSE]

[IF DOWNTOWN SEATTLE OR BELLEVUE, PROBE: Would that be downtown or a surrounding area?]

1 Downtown Seattle Core,
2 Surrounding Downtown Seattle
3 University District,
4 Other areas in North King County,
5 Downtown Bellevue,
6 Redmond
7 Other areas in East King County,
8 South King County
9 Tacoma or other areas in Pierce County
10 Everett or other areas in Snohomish County
11 Somewhere Else? [SPECIFY:_____]
77 VARIES

88 DON'T KNOW
99 REFUSED

COMM1A [ASK IF COMM1 EQ 1 OR 2] Would that be . . . [READ ENTIRE LIST]

1 Downtown Seattle Core,
2 Denny Regrade
3 Belltown,
4 Pioneer Square,
5 International District,
6 Duwamish,
7 Sodo,
8 Queen Anne,
9 South Lake Union,
10 Capitol Hill,
11 First Hill, or
12 Somewhere Else Surrounding downtown Seattle? [SPECIFY:_____]
77 VARIES
88 DON'T KNOW
99 REFUSED

COMM1B [ASK IF COMM1 EQ 3 OR 4] Would that be . . . [READ ENTIRE LIST]

1 University District,
2 University Village,
3 Fremont,
4 Ballard,
5 Northgate
6 Kenmore,
7 Shoreline,
8 North Seattle, or
9 Somewhere Else in North King County? [SPECIFY:_____]
77 VARIES
88 DON'T KNOW
99 REFUSED

COMM1C [ASK IF COMM1 EQ 5, 6 OR 7] Would that be . . . [READ ENTIRE LIST]

1 Bellevue,
2 Kirkland,
3 Redmond,
4 Overlake
5 Eastgate
6 Issaquah,
7 Bothell,
8 Woodinville,
9 Somewhere Else in East King County? [SPECIFY:_____]
77 VARIES
88 DON'T KNOW
99 REFUSED

COMM1D [ASK IF COMM1 EQ 8] Would that be . . . [READ ENTIRE LIST]

1 Auburn,
2 Federal Way,
3 Kent,
4 Renton,
5 Tukwila,
6 Southcenter,
7 SeaTac,
9 Somewhere Else in South King County? [SPECIFY:_____]
77 VARIES
88 DON'T KNOW
99 REFUSED

COMM2 How do you usually get to and from [work / school]? [CHECK ALL THAT APPLY] [READ LIST ONLY IF NECESSARY]
[IF DRIVE, PROBE – Would that be alone, with at least 2 people in the car, in a vanpool with 7 or more people, or a motorcycle?]

1 Drive alone
2 Carpool
3 Vanpool
4 Ride a Metro bus
5 Ride the South Lake Union Streetcar
6 Ride the Sounder Train
7 Ride Link Light Rail
8 Ride a Sound Transit Bus
9 School Bus
10 Ride Another System's Bus
11 Motorcycle
12 Bicycle
13 Walk
15 Drive to park & ride lot
14 OTHER (SPECIFY)
88 DON'T KNOW
99 REFUSED

COMMLONG [ASKIF COMM2 HAS MULTIPLE RESPONSE] What do you consider the **primary mode** you use on your commute trip? [ONLY SHOW ANSWERS FROM COMM2]

1 Drive alone
2 Carpool
3 Vanpool
4 Ride a Metro bus
5 Ride the South Lake Union Streetcar
6 Ride the Sounder Train
7 Ride Link Light Rail
8 Ride a Sound Transit Bus
9 School Bus
10 Ride Another System's Bus
11 Motorcycle
12 Bicycle
13 Walk
15 Drive to park & ride lot
14 OTHER (SPECIFY)
88 DON'T KNOW
99 REFUSED

COMMLONG1 [ASKIF: COMM2 OR COMMLONG=4] Is your bus trip only within the downtown Seattle Ride Free Area?

1 YES
2 NO
9 DON'T KNOW / REFUSED

COMM2AA [IF COMM2 =2] Do you carpool with . . .

1 With other family members
2 With non-family members
3 BOTH / MIXTURE
8 DON'T KNOW
9 REFUSED

COMM2A [IF COMM2 =10] Is that a Community Transit or Pierce Transit bus?

1 METRO TRANSIT
3 COMMUNITY TRANSIT
4 PIERCE TRANSIT
5 SCHOOL BUS
6 OTHER [SPECIFY]
8 DON'T KNOW
9 REFUSED

COMM3 How many miles do you travel from home to (work / school) one-way?
[PROBE: "Using your best estimate."] [IF LESS THAN 1, ENTER 1]

___ ENTER NUMBER OF MILES
777 VARIES
888 DON'T KNOW
999 REFUSED

COMM3A About how long does that usually take you?

___ ENTER TIME (HOURS OR MINUTES)
777 VARIES
888 DON'T KNOW
999 REFUSED

COMM3B TIME REFERENCE [SKIP IF COMM3A=777, 888 OR 999]

1 MINUTES
2 HOURS

COMM4 What is your usual schedule at (work / school)? First, what time do you begin?
[ENTER BOTH HOURS AND MINUTES]
[CHECK NUMBER CAREFULLY. PRESS ENTER TO GO ON.]

____ TIME WORK / SCHOOL BEGINS
7777 CHANGES / VARIES FROM DAY TO DAY [SKIP TO COMM5]
8888 DON'T KNOW [SKIP TO COMM5]
9999 REFUSED [SKIP TO COMM5]

COMM4A VERIFY TIME REFERENCE [SKIP IF COMM4=777, 888 OR 999]

1 AM
2 PM

COMM5 And what time do you finish (work / school)?
[ENTER BOTH HOURS AND MINUTES]
[CHECK NUMBER CAREFULLY. PRESS ENTER TO GO ON.]

_____ TIME WORK / SCHOOL ENDS
7777 CHANGES / VARIES FROM DAY TO DAY [SKIP TO COMM7]
8888 DON'T KNOW [SKIP TO COMM7]
9999 REFUSED [SKIP TO COMM7]

COMM5A VERIFY TIME REFERENCE [SKIP IF Q37=777, 888 OR 999]

1 AM
2 PM

COMM6 [COMPUTE NUMBER OF HOURS WORK] To verify do you typically work [SHOW COMPUTATION] per day?

1 YES
2 NO [IF NO GO BACK AND REASK COMM4 AND COMM5]
9 DON'T KNOW / REFUSED

COMM7 [IF COMMUTER EQ 1] About how many employees work for your employer at your place of employment?
[IF NEEDED: Please include only the employees that work at your branch / work site]

1 100 OR MORE
2 51-99
3 26-50
4 25 OR FEWER
8 DON'T KNOW
9 REFUSED

PARKING - ALL WORK AND STUDENT COMMUTERS -- [COMMUTER = 1 OR 2]

PARK1 Does your [employer / school] offer or provide you with free or reduced fee parking at [work / school]? [PROBE: "Is that free or reduced fee?"]

1 YES – FREE [SKIP TO PARK2B]
2 YES - REDUCED FEE
3 NO
4 FREE, BUT NOT PROVIDED BY EMPLOYER / SCHOOL [SKIP TO PARK2B]
5 FREE, BUT DON'T KNOW WHO PAYS [SKIP TO PARK2B]
8 DON'T KNOW [SKIP TO PARK2B]
9 REFUSED [SKIP TO PARK2B]

PARK2 [IF (PARK1 = 2 OR 3) AND (COMM2=1,2,3,11)] How much do you personally pay for parking?
[ENTER DOLLARS AND CENTS. YOU MUST ENTER A DECIMAL POINT TO INDICATE CENTS.]

_____ RECORD PARKING COST
77777 OTHER [SPECIFY:_____]
88888 DON'T KNOW
99999 REFUSED

PARK2A [IF PARK2 NE 77777 OR 88888 OR 99999] SELECT

1 PER DAY
2 PER MONTH
3 PER QUARTER
4 PER SEMESTER
5 PER YEAR

PARK2B How many days a month do you park at [work / school]?

__ NUMBER OF DAYS PARK / MONTH
88 DON'T KNOW
99 REFUSED

PARK3 [IF COMM2 NE 4 or 5] Overall, how appealing to you personally is the idea of using a Metro bus or Streetcar instead of driving to [work/school]? Would you say

5 Very appealing,
4 Somewhat appealing,
2 Not very appealing, or
1 Not at all appealing?
3 NEITHER APPEALING NOR UNAPPEALING
8 DON'T KNOW
9 REFUSED

OTHER TRAVEL – ALL RESPONDENTS

PERT1 What method of transportation do you usually use to get around for most of your personal that is non-work, travel? [PROBE FOR WHAT THEY USE MOST OFTEN] [READ LIST ONLY IF NECESSARY]
[IF DRIVE, PROBE – Would that be alone, with at least 2 people in the car, in a vanpool with 7 or more people, or a motorcycle?]

1 Drive alone
2 Carpool
3 Vanpool
4 Ride a Metro bus
5 Ride the South Lake Union Streetcar
6 Ride the Sounder Train
7 Ride Link Light Rail
8 Ride a Sound Transit Bus
9 School Bus
10 Ride Another System's Bus
11 Motorcycle
12 Bicycle
13 Walk
14 OTHER (SPECIFY)
15 ***RIDE AN ACCESS VAN***
88 DON'T KNOW
99 REFUSED

PERT1A [IF PERT1 =10] Is that a Community Transit or Pierce Transit bus?

1 METRO TRANSIT
3 COMMUNITY TRANSIT
4 PIERCE TRANSIT
5 SCHOOL BUS
6 OTHER [SPECIFY]
8 DON'T KNOW
9 REFUSED

PERT2 [IF PERT1 <> 4 OR 5] Overall, how appealing to you personally is the idea of using a Metro bus or Streetcar for your personal, non-work travel? Would you say...

5 Very appealing,
4 Somewhat appealing,
2 Not very appealing, or
1 Not at all appealing?
3 NEITHER APPEALING NOR UNAPPEALING
8 DON'T KNOW
9 REFUSED

PARK AND RIDE

PAR1 [ALL RESPONDENTS] Have you used a Metro park and ride lot within the last year?

1 YES
2 NO
9 DON'T KNOW / REFUSED

PAR2A [IF PAR1=1] Do you usually use the park and ride to…
[READ LIST AND ACCEPT ONE RESPONSE]

1 Park your car and catch a bus / train,
2 Transfer from another bus/ train,
3 Meet vanpool partners,
4 Meet carpool partners,
5 JUST USE AS A PARKING LOT,
6 PICKUP/DROP-OFF SOMEONE, OR
7 For some Other Reason? [SPECIFY:_____]
9 DON'T KNOW / REFUSED

PAR2 [IF PAR2A=1] How many times have you used Metro's park and ride lots in the last 30 days?

_____ ENTER NUMBER OF TIMES
97 97 OR MORE
98 DON'T KNOW
99 REFUSED

POTENTIAL TO INCREASE RIDERSHIP

IF (RIDESTAT EQ 2 OR 3) AND (PARK3= 2-4,8,9 OR PERT2=2-4,8,9))
OR
(RIDESTAT =1) AND (COMM2 EQ 1) AND (PARK3= 2-4,8,9 OR PERT2=2-4,8,9))

(NON-RIDER, INFREQUENT RIDERS OR REGULAR RIDERS WHO DRIVE ALONE) AND (DO NOT ANSWER "NOT AT ALL APPEALING" TO PARK3 AND PERT2)

BARRINT [RIDESTAT = 3] Please rate the extent to which each of the following is a barrier to you taking the bus or streetcar.

[RIDESTAT = 2] Please rate the extent to which each of the following is a barrier to you taking the bus or streetcar more often.

[(RIDESTAT =1) AND (COMM2 OR COMMLONG EQ 1)] Please rate the extent to which each of the following is a barrier to you taking the bus or streetcar to [work / school].

Use a scale from 1 to 7 where "1" means it is "not a barrier at all" and "7" means it is a "significant barrier,"

[ROTATE ORDER IN BLOCKS BARR1 - BARR14 AND BARR15 - BARR19] [IF NEEDED: REREAD SCALE AS NECESSARY]

[IF NEEDED: A barrier means anything that keeps you from riding the bus.]

1 NOT A BARRIER AT ALL
2
3
4
5
6
7 VERY SIGNIFICANT BARRIER
8 DON'T KNOW
9 REFUSED

BARR1 Time it takes to travel by bus or streetcar
BARR2 Overcrowded buses / streetcars
BARR3 Concerns about personal safety while riding the bus or streetcar
BARR4 Concerns about personal safety while waiting for the bus or streetcar
BARR5 Having to transfer [IF NEEDED: Having to take more than one bus]
BARR6 Having to plan around bus / streetcar schedules
BARR7 Not knowing how to use the bus or streetcar system
BARR8A No access to a park-and-ride lot
BARR8B Lack of parking at park and ride lots
BARR9 Concerns about the behavior of others on the bus or streetcar
BARR10 No bus or streetcar stops near your home
BARR11 Bus or streetcar routes don't go where you want to go
BARR12 [IF COMMUTER = 1 OR 2] Frequency of bus or streetcar service after 6 p.m.
BARR13 **[IF COMMUTER = 1 OR 2]** Employer provides free or inexpensive parking
BARR14 **[IF COMMUTER = 1 OR 2]** Need a car in case of an emergency at home
BARR15 **[IF COMMUTER = 1]** No bus or streetcar stop near work **[IF COMMUTER = 2]** No bus or streetcar stops near school
BARR16 **[IF COMMUTER = 1]** Need a car during the work day for work-related business
BARR17 **[IF COMMUTER = 1 OR 2]** Need a car during the day for personal errands
BARR18 **[IF COMMUTER = 1]** Often have to work late **[IF COMMUTER = 2]** Often have to be at school late
BARR19 **[IF COMMUTER = 1]** Work hours are irregular **[IF COMMUTER = 2]** School hours are irregular
BARR20 No place to sit
BARR21 Concerns about the behavior of others at the bus or streetcar stops
BARR22 Overall frequency of service

BARR00 If Metro no longer accepted cash fares, to what extent would that be a barrier to you taking the bus or streetcar?
[IF NEEDED: REREAD SCALE AS NECESSARY: Use a scale from 1 to 7 where "1" means it is "not a barrier at all" and "7" means it is a "significant barrier"]

1 NOT A BARRIER AT ALL
2
3
4
5
6
7 VERY SIGNIFICANT BARRIER
8 DON'T KNOW
9 REFUSED

BARR23 If these barriers did not exist, would you ride the bus or streetcar [ride the bus more often]? Would you say you would…
[SHOW COMMAND IF RIDESTAT = 1 OR 2 for "ride the bus or streetcar more often".]

4 Definitely ride,
3 Probably ride,
2 Might ride, or
1 Not ride?
9 DON'T KNOW/REFUSED

RIDER SATISFACTION - ALL RIDERS / INFREQUENT RIDERS
[RIDESTAT = 1 OR 2]

SAT1INT Next, I am going to read several aspects of Metro services. As I read each item, please tell me whether you are satisfied or dissatisfied. Would that be very or somewhat [satisfied / dissatisfied]? [RANDOMIZE SAT1A to SAT1CC]

SAT1A [PROMPT AS REQUIRED: Are you satisfied or dissatisfied? Would that be very or somewhat?]

1 VERY DISSATISFIED
2 SOMEWHAT DISSATISFIED
3 NO OPINION
4 SOMEWHAT SATISFIED
5 VERY SATISFIED
6 DOES NOT APPLY
8 DON'T KNOW
9 REFUSED

	IF RIDERMODE =1 (BUS)	IF RIDERMODE =2 (STREETCAR)	IF RIDERMODE =3 (BOTH)
SAT1A	On-time performance of buses	On-time performance of streetcars	On-time performance of buses and streetcars
SAT1B	Cleanliness of bus shelters	Cleanliness of streetcar shelters	Cleanliness of bus and streetcar shelters
SAT1C	Inside cleanliness of buses	Inside cleanliness of streetcars	Inside cleanliness of buses and streetcars

	IF RIDERMODE =1 (BUS)	IF RIDERMODE =2 (STREETCAR)	IF RIDERMODE =3 (BOTH)
SAT1D	Availability of seating on the bus	Availability of seating on the streetcar	Availability of seating on the bus and streetcar
SAT1E	[ALL] Where the routes go		
SAT1F	[ALL] Frequency of service		
SAT1G	[ALL] Driver courtesy		
SAT1H	[ALL] Driver Helpfulness with route/stop information		
SAT1I	[P&R LOT USERS – IF PAR2A=1] The ability to get a parking space at park and ride lots		
SAT1J	The number of stops the bus makes on your trip	The number of stops the streetcar makes on your trip	The number of stops the bus or streetcar makes on your trip
SAT1K	[ALL] The number of transfers you have to make to get where you are going		
SAT1L	[ALL TRANSFERS – MET7 EQ 1-8] The wait time when transferring buses		
SAT1M	[ALL] Amount of time it takes to travel		
SAT1N	[ALL] Ability to get information about Metro's Routes and Schedules		
SAT1O	[ALL] Ability to get current printed timetables for routes		
SAT1P	Personal safety on the bus related to the conduct of others during the daytime	Personal safety on the streetcar related to the conduct of others during the daytime	Personal safety on the bus or streetcar related to the conduct of others during the daytime
SAT1Q	Personal safety on the bus related to the conduct of others after dark	Personal safety on the streetcar related to the conduct of others after dark	Personal safety on the bus or streetcar related to the conduct of others after dark
SAT1R	Driver operates the bus in a safe and competent manner	Driver operates the streetcar in a safe and competent manner	Driver operates the bus or streetcar in a safe and competent manner
SAT1S	Personal safety waiting for the bus in the daytime	Personal safety waiting for the streetcar in the daytime	Personal safety waiting for the bus or streetcar in the daytime
SAT1T	Personal safety waiting for the bus after dark	Personal safety waiting for the streetcar after dark	Personal safety waiting for the bus or streetcar after dark
SAT1U	Overcrowding on the bus	Overcrowding on the streetcar	Overcrowding on the bus or streetcar

SAT1V	[P&R LOT USERS – PAR1 EQ 1] Personal safety at the park-and-ride lot
SAT1W	[P&R LOT USERS – IF PAR2A=1] Security of your automobile at the park-and-ride lot
SAT1X	[ALL] Driver announces next stop
SAT1Y	[ALL] Ease of paying fares
SAT1Z	[IF MET9=1] Personal safety in the downtown transit tunnel
SAT1AA	[ALL] How drivers handle incidents that arise
SAT1BB	[FARE1AB=1 OR FARE1=1 OR FARE1A=1] ORCA Card
SAT1CC	[OU7=1,2 OR 3] Ease of loading a pass or adding value to your E-Purse
SAT1XX	[ALL] Overall, how satisfied are you with Metro Transit?

RIDER IMPORTANCE – RIDESTAT EQ 1 OR 2

IMPT Now I will read you a list similar to the previous list, but this time please tell me how important each item is in deciding whether to ride the bus or streetcar or ride more often. Use a 7-point scale where "1" means "not at all important" and "7" means "extremely important." [RANDOMIZE IMPT_01 – IMPT_13]

	IF RIDERMODE =1 (BUS)	IF RIDERMODE =2 (STREETCAR)	IF RIDERMODE =3 (BOTH)
IMPT_01	Personal safety waiting for the bus in the daytime	Personal safety waiting for the streetcar in the daytime	Personal safety waiting for the bus or streetcar in the daytime
IMPT_02	Personal safety waiting for the bus after dark	Personal safety waiting for the streetcar after dark	Personal safety waiting for the bus or streetcar after dark
IMPT_03	Availability of seating on the bus	Availability of seating on the streetcar	Availability of seating on the bus and streetcar
IMPT_04	On-time performance of buses	On-time performance of streetcars	On-time performance of buses or streetcars
IMPT_05	Travel time by bus	Travel time by streetcar	Travel time by bus or streetcar
IMPT_06	The ability to get a parking space in park and ride lots		
IMPT_07	Frequency of service		
IMPT_08	The number of stops the bus makes on your trip	The number of stops the streetcar makes on your trip	The number of stops the bus or streetcar makes on your trip
IMPT_09	The number of transfers you have to make to get where you need to go		
IMPT_10	Availability of service from my home to where I need to go		
IMPT_11	Behavior of other people on the bus	Behavior of other people on the streetcar	Behavior of other people on the bus or streetcar
IMPT_12	Behavior of other people where I wait for the bus	Behavior of other people where I wait for the streetcar	Behavior of other people where I wait for the bus or streetcar
IMPT_13	Personal safety while riding the bus	Personal safety while riding the streetcar	Personal safety while riding the bus or streetcar

NET PROMOTER

SAT2: [ASKIF RIDESTAT=1 OR 2] How likely is it that you would recommend riding Metro to a friend or colleague? Please use a scale where 0 is not at all likely to recommend and 10 is extremely likely to recommend.

[ASKIF RIDESTAT=3] Based on anything you have read, seen, or heard, how likely is it that you would recommend riding Metro to a friend or colleague? Please use a scale where 0 is not at all likely to recommend and 10 is extremely likely to recommend.

_____ ENTER RATING
98 DON'T KNOW
99 REFUSED

METRO INFORMATION SERVICES

AWARE1 I am going to read you a list of sources that provide information about Metro. As I read each one, please tell me if you are aware of the service and then I will ask whether you have used the service? READ ENTIRE LIST AND ENTER RESPONSE (YES / NO) FOR EACH ITEM. RANDOMIZE

[INTERVIEWER NOTE: ASK AWARE (YES/NO) AND IF YES, ASKED IF USED]

1 YES, AWARE / NOT USED
2 YES, AWARE / USED
3 NO, NOT AWARE
8 DON'T KNOW
9 REFUSED

A Metro's Printed timetables
B Metro Online (READ IF NECESSARY: Metro Transit website/@ www.metro.kingcounty.gov)
C Rider Information telephone line [READ IF NECESSARY: (206)-553-3000)
D Information posted at bus stops
E Information posted at transit centers or at park and ride lots
F "Bus time", Metro's automated information line you can call
G Metro Tracker website
H OneBusAway
I Google's Trip Planner/GOOGLE MAPS
K Metro's Twitter Page
L Metro alerts via text messaging
M Metro alerts via e-mail
N Metro alerts on your home telephone
O Regional Trip planner on Metro's website
P RideshareOnline.com
Q Eye on Your Metro Commute

R Estately.com

S the SeattleBus App

T Any other apps for Metro information (SPECIFY) [ALWAYS SECOND TO LAST]

1 METRO
2 BING
3 ONEBUSWAY
4 NONE
5 OTHER
6 GOOGLE
8 DON'T KNOW

Z Websites other than Metro's (SPECIFY) [ALWAYS LAST] [INTERVIEWER NOTE: IF RESPONDENT ANSWERS THIS QUESTION, FOLLOW UP WITH: Do you use this website to get information about Metro? If "no", don't enter and code 3 NO, NOT AWARE. If "yes", code 1 AWARE/USED]

1 COMMUNITY TRANSIT / SOUND TRANSIT / PIERCE TRANSIT / OTHER TRANSIT
2 BING
3 YAHOO
4 MAPQUEST
5 SCHOOL WEBSITE / U. OF WASHINGTON SITE
6 OTHER GOVT. WEBSITE (e.g. City of Seattle, Washington DOT)
97 OTHER WEBSITE
98 DON'T KNOW

USESAT Please tell me whether you are satisfied or dissatisfied with... Would that be very or somewhat [satisfied / dissatisfied]?

1 VERY DISSATISFIED
2 SOMEWHAT DISSATISFIED
3 NO OPINION
4 SOMEWHAT SATISFIED
5 VERY SATISFIED
8 DON'T KNOW
9 REFUSED

B [ASKIF AWARE1B=2] Metro Online (READ IF NECESSARY: Metro Transit website/@ www.metro.kingcounty.gov)

G [ASKIF AWARE1G=2] Metro Tracker website

H [ASKIF AWARE1H=2] OneBusAway

I [ASKIF AWARE1I=2] Google's Trip Planner/GOOGLE MAPS

K [ASKIF AWARE1K=2] Metro's Twitter Page

L [ASKIF AWARE1L=2] Metro alerts via text messaging

M [ASKIF AWARE1M=2] Metro alerts via e-mail

N [ASKIF AWARE1N=2] Metro alerts on your home telephone

O [ASKIF AWARE1O=2] Regional Trip planner on Metro's website
P [ASKIF AWARE1P=2] RideshareOnline.com
Q [ASKIF AWARE1Q=2] Eye on Your Metro Commute
R [ASKIF AWARE1R=2] Estately.com
S [ASKIF AWARE1S=2] the SeattleBus App
T [ASKIF AWARE1T=2] The other apps you use for Metro information
Z [ASKIF AWARE 1Z=2] Websites other than Metro's

DEMOGRAPHIC QUESTIONS

DEMO Finally, I have some background questions that will be used to help us analyze the results of the study.

DEMO1 Do you have a valid driver's license?

1 YES
2 NO
8 DON'T KNOW
9 REFUSED

DEMO1A [ASK IF DEMO1 = 1] How many vehicles in working condition do you have available for your use?

__ ENTER NUMBER OF AUTOMOBILES
8 8 OR MORE
9 REFUSED

HISPAR Are you Spanish, Hispanic, or Latino?

[DO NOT READ UNLESS RESPONDENT SEEMS UNSURE. PROBE: Are you or were your ancestors Mexican, Puerto Rican, Cuban, Central or South American, or from Spain?]

1 YES
2 NO
9 DON'T KNOW / REFUSED

RACE I am going to read a list of race categories. Please choose one or more races you consider yourself to be:
[If they say "Hispanic" PROBE**:** "In addition to Hispanic, what other race categories do you consider yourself to be?"]
[SELECT ALL THAT APPLY] [READ LIST]

1 White
2 Black or African American
3 American Indian or Alaskan Native
4 Asian or Pacific Islander
6 HISPANIC
9 DON'T KNOW / REFUSED
77 OTHER SPECIFY

DEMO5 [SKIP IF SAMP_TYPE=4] Is your total annual household income above or below $35,000 per year?

1 BELOW $35,000 PER YEAR
2 ABOVE $35,000 PER YEAR [SKIP TO DEMO5B]
8 DK - PROBE FOR BEST ESTIMATE [SKIP TO DEMO6]
9 REFUSED [SKIP TO DEMO6]

DEMO5A [IF DEMO5 = 1] Would that be....?

1 Less than $7,500,
2 $7,500 up to $15,000,
3 $15,000 up to $25,000, or
4 $25,000 up to $35,000?
8 DON'T KNOW
9 REFUSED

DEMO5B [IF DEMO5 = 2] Would that be....?

1 $35,000 up to $55,000,
2 $55,000 up to $75,000,
3 $75,000 up to $100,000,
4 $100,000 up to $150,000, or
5 $150,000 and up?
8 DON'T KNOW
9 REFUSED

DEMO6 For our records, I need to verify your telephone number. Is it... [SHOW PHONE]?

1 YES
2 NO
9 REFUSED

DEMO6A [IF DEMO6 = 2] What is your correct telephone number?

_____ ENTER CORRECT PHONE NUMBER
(999) 999-9999 REFUSED

LAND1 [ASK IF SAMPLE IS LANDLINE or TELUSE2 = 1] AND REF13<>1 How many landline telephone numbers are associated with this household? Do not include cellular telephone service.

[READ IF NECESSARY: By landline telephone we mean a "regular" telephone in your home that is connected to outside telephone lines through a cable or cord and is used to make and receive calls.]

___ ENTER NUMBER [VALID RANGE: 1-97; TEL1 CANNOT = 0]
98 CELL PHONE ONLY FROM LANDLINE SAMPLE
99 DON'T KNOW / REFUSED

LAND2 [ASK IF: (LAND1 > 1 IF BASE OR RIDER) OR LAND1 GE 1 IF CELL PHONE AND REF13<>1]
How many telephone lines in your household are currently used only for non-voice communications, such as a dedicated fax or modem line?

[READ IF NECESSARY: Do NOT include cellular telephone service.]

___ ENTER NUMBER [VALID RANGE: 0-98]
99 DON'T KNOW / REFUSED

TELUSE1 [ASK IF LANDLINE SAMPLE] In addition to you landline, do you have a working cell phone? Do not include cell phones used only for business purposes.

1 YES, HAVE CELL PHONE
2 NO, DO NOT [LANDLINE ONLY]
8 DON'T KNOW/NOT SURE
9 REFUSED

TELUSE3 [ASK IF TELUSE1 = 1] Of all the telephone calls that you receive, are. . .

[READ LIST. RECORD ONE ANSWER]

1 All or almost all calls received on a cell phone [CELL PHONE PRIMARILY]
2 Some received on a cell phone and some on a regular landline phone [EQUAL USER]
3 Very few or none received on a cell phone [LANDLINE PRIMARILY]
8 DON'T KNOW/NOT SURE [EQUAL USER?]
9 REFUSED [SCREENER REFUSAL]

DEMO8 We may be doing other studies similar to this one in the future. May we call you again if we do?

1 YES - OKAY TO CALL
2 NO - DON'T CALL / REFUSED [SKIP TO THANK]

DEMO8A May I have your first name, so we will know who to ask for? [OPEN END]

THANK

THANK That concludes our survey. Thank you very much for your time and the useful information you have provided us.

THANK2 Thank you for your time. We appreciate your cooperation in agreeing to complete this survey. Today we are only interviewing residents of King County.

THANK3 Thank you very much for answering those questions. We appreciate your cooperation.

THANK4 That completes our survey. Thank you for your time. We appreciate your cooperation in agreeing to complete this survey.

THANK5 Thank you very much for answering those questions. This data is really important for our survey.

THANK6 Thank you for your time. We appreciate your cooperation in agreeing to complete this survey. Today we are only interviewing residents 16 years of age or older.

THANK8 Thank you for your time, but we are unable to continue without that information.