King County
METRO

King County
Metro Transit

2015 Rider/Non-Rider Survey
Final Report

June 2016

Research Conducted for:
King County
Department of Transportation
Metro Transit Division

By:

Northwest Research Group, LLC

King County METRO We'll Get You There

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EXECUTIVE SUMMARY

Project Overview

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

Objectives

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

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

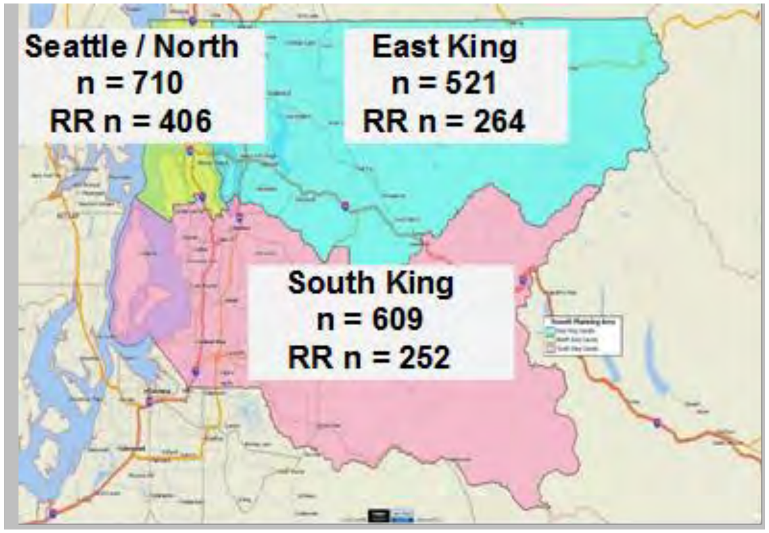
Methodology

The survey uses a robust dual-frame sample (calling both landline and cell-phone numbers) to reach a representative sample of all King County households. Riders are surveyed annually and Non-Riders biennially (typically in odd-numbered years). In 2015, 1,840 interviews were completed with three segments of Riders and Non-Riders:

Segment	Definition	Total Sample (n)
Regular Riders	Riders who took five or more one-way rides in the past 30 days	922
Infrequent Riders	Riders who took 1-4 one-way rides in the past 30 days	103
Non-Riders	Have not ridden Metro in the past 30 days	815

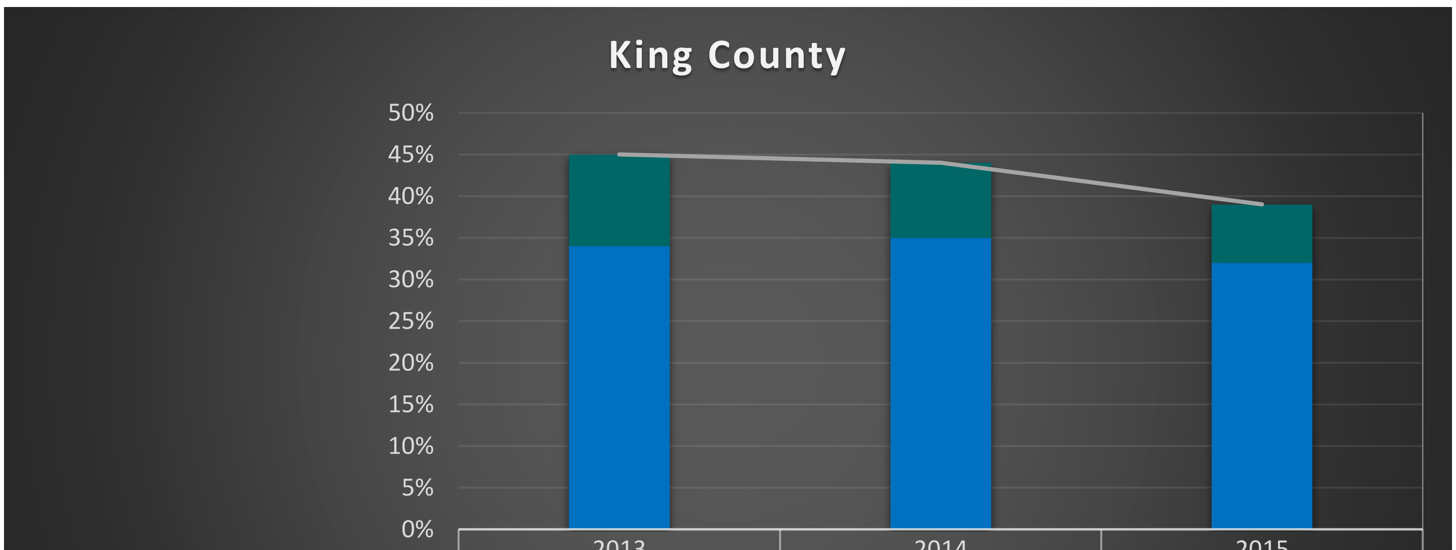
The sample was stratified using the boundaries of Metro's former planning areas. A minimum number of interviews with Regular Riders was set for each geographic area (400 in Seattle / North King County and 250 each in South and East King County).

Actual interview totals for each area are shown at right ("n" refers to total completed interviews; "RR n" refers to Regular Rider interviews). Data are weighted to reflect area populations, and additional weighting reflects landline and cellphone incidence and a supplemental sample of low-income respondents.



Key Findings

MARKET SHARE
Metro continues to serve as an important mode of transportation for a significant percentage (39%) of King County households.
Nearly two out of five King County households use Metro on a regular or semi-regular basis. This percentage has been decreasing since its peak in 2013, due to a year over year decrease in the percentage of Infrequent Rider households. The percentage of Regular Rider households decreased slightly but this decrease is not statistically significant. Metro's total ridership grew slightly in 2015, and this is partly reflected by an increase in the average number of monthly trips seen in the study among Riders (see next page).

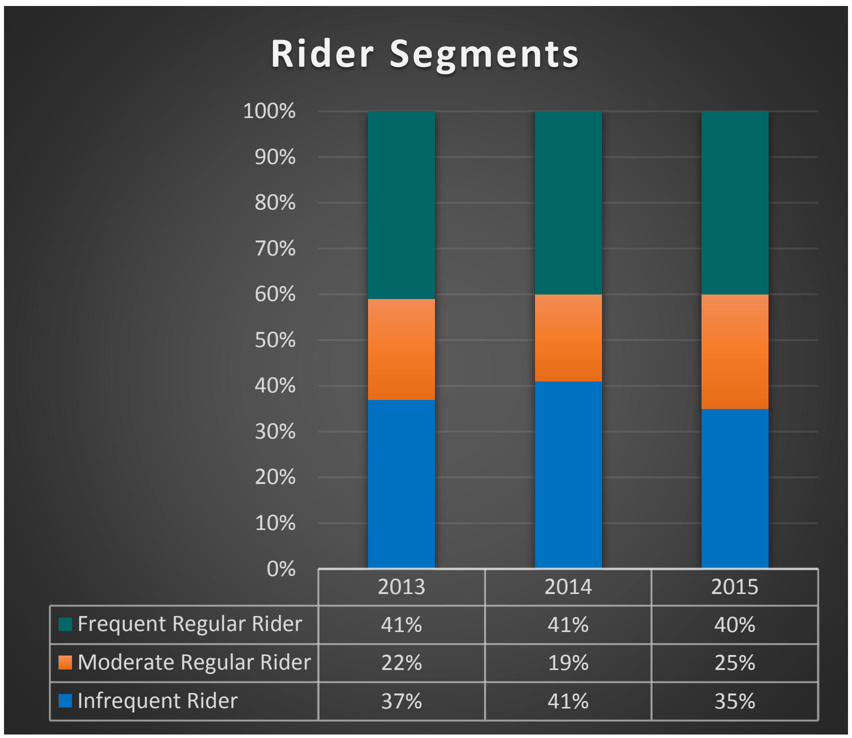


	2013	2014	2015
% Infrequent Rider Households	11%	9%	7%
% Regular Rider Households	34%	35%	32%
Total Rider Households	45%	44%	39%

TRANSIT USE

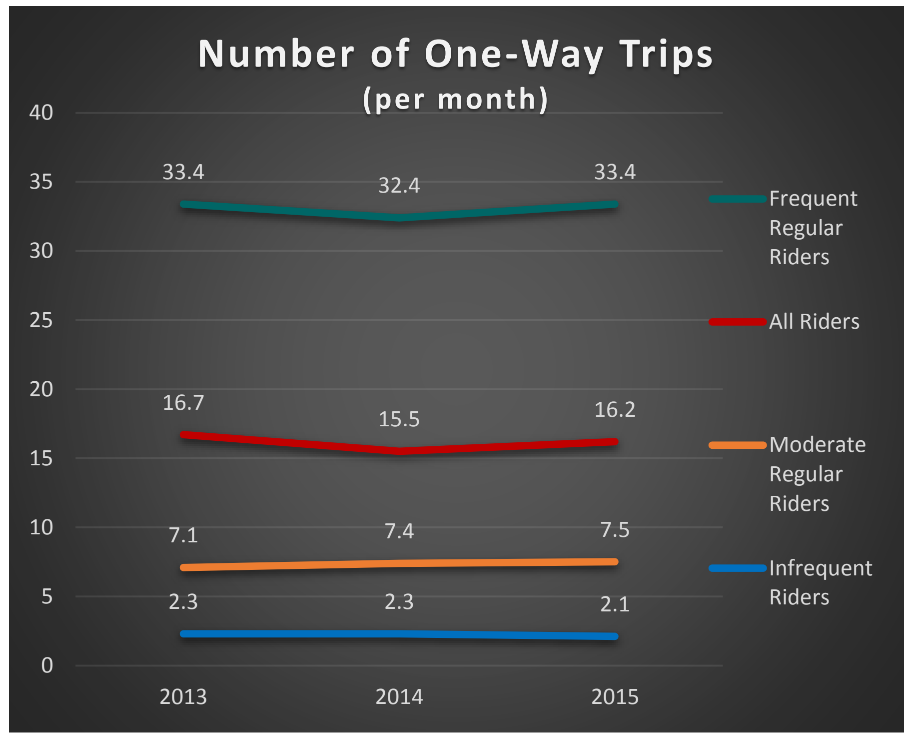
Metro has three Rider segments, based on the number of monthly trips they take. Frequent Regular Riders (11+ one-way trips monthly) continue to be Metro's core market, representing 40% of all Riders and accounting for nearly 85% of all trips.

The percentage of Riders who are Regular Riders increased significantly in 2015 due to an increase in the percentage of Moderate Regular Riders (between 5 and 10 one-way rides monthly) and a corresponding decrease in the percentage of Infrequent Riders (1-4 rides per month).



The average number of one-way trips Riders take decreased in 2014 but increased 5% in 2015.

At least some of Metro's increased ridership in recent years can be attributed to more Moderate Regular Riders taking slightly more trips.

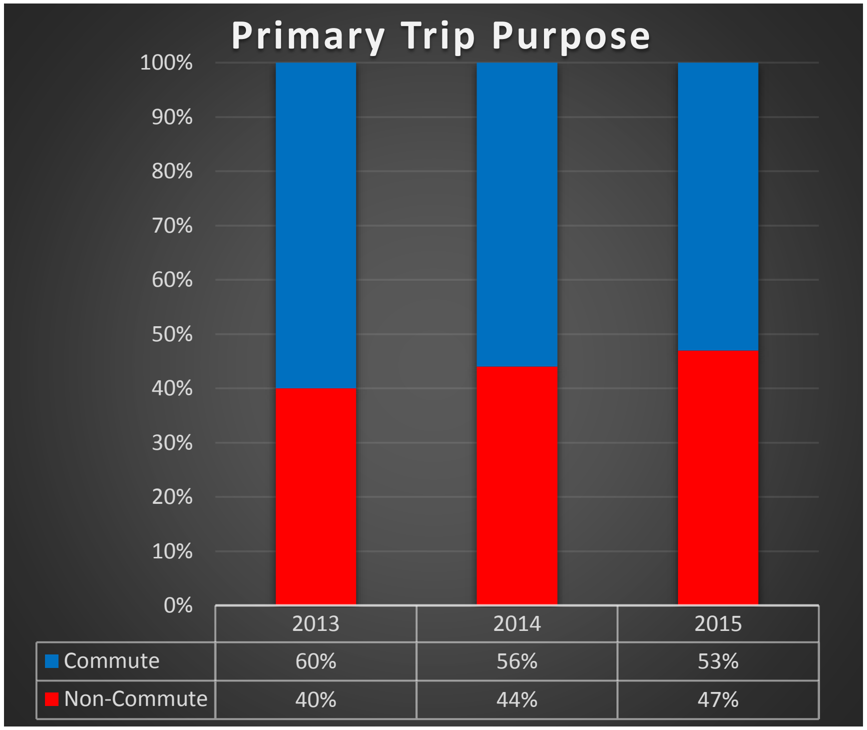


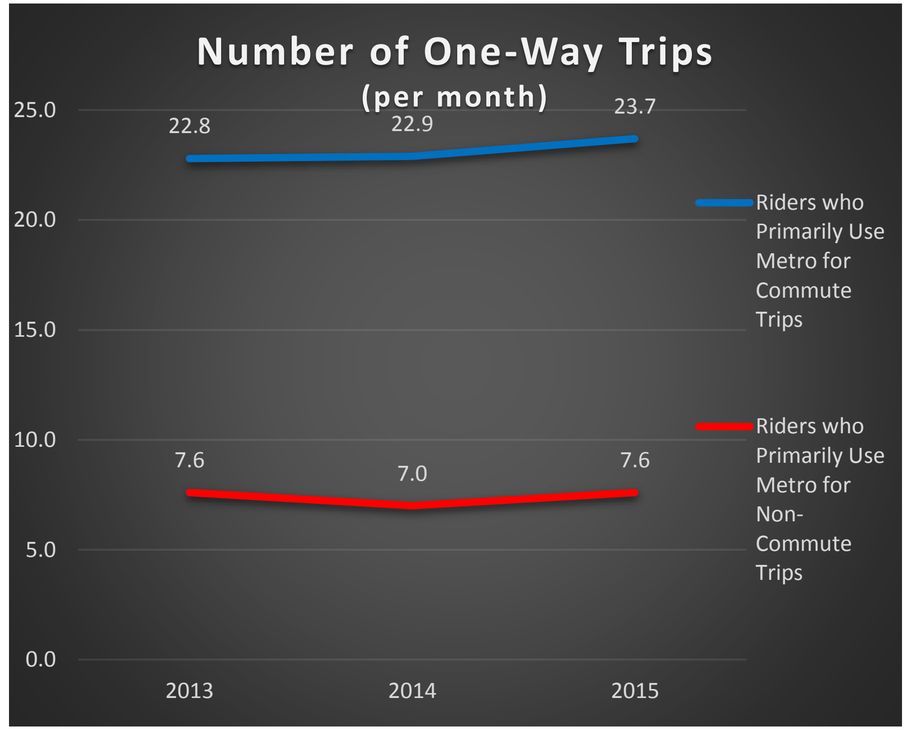
Most Riders use Metro primarily to commute to work or school, and these Riders account for the majority of Metro trips. But a growing percentage of Riders primarily use Metro for non-commute trips.

Commuting continues to be the primary trip for which Riders use Metro. However, a significant and growing percentage use Metro for non-commute trips—primarily recreation and shopping.

Riders who primarily use Metro for commute trips take three times as many monthly trips as those using Metro for non-commute trips.

Therefore, while only 53% of all Riders primarily use Metro for commute trips, they account for 77% of all monthly trips.





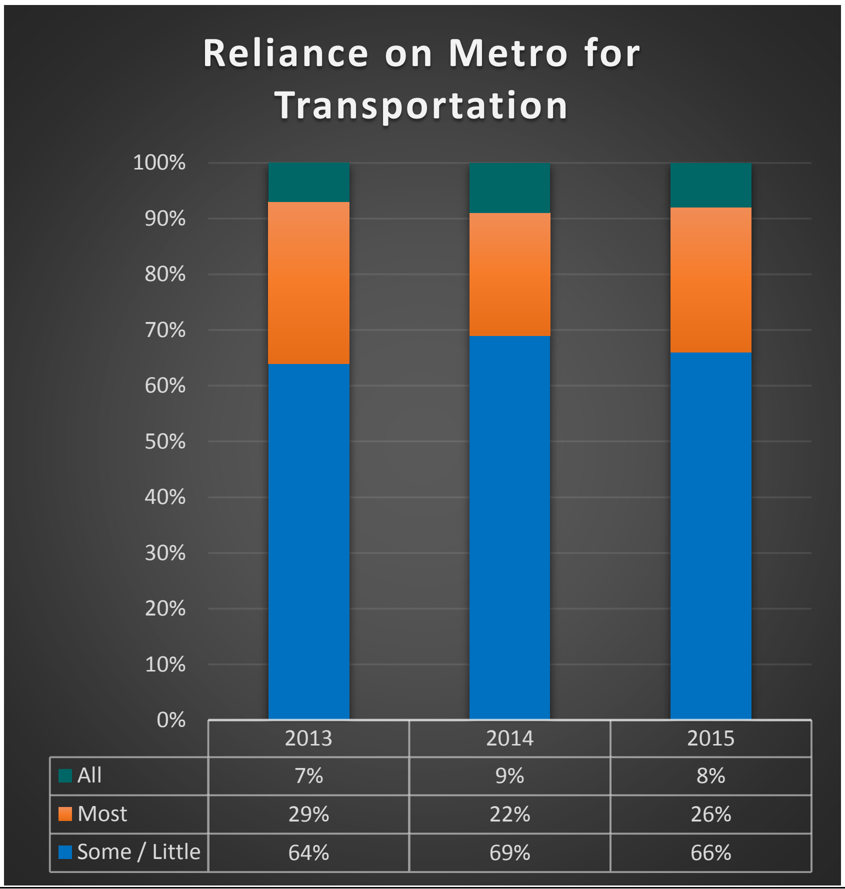
Most Metro Riders are "Choice" Riders—that is, they have other transportation options. While the large majority of Riders have access to a vehicle, some may be choosing to give up their personal vehicles as new transportation options become available.

The majority of Riders rely on Metro for some or very little of their transportation needs.

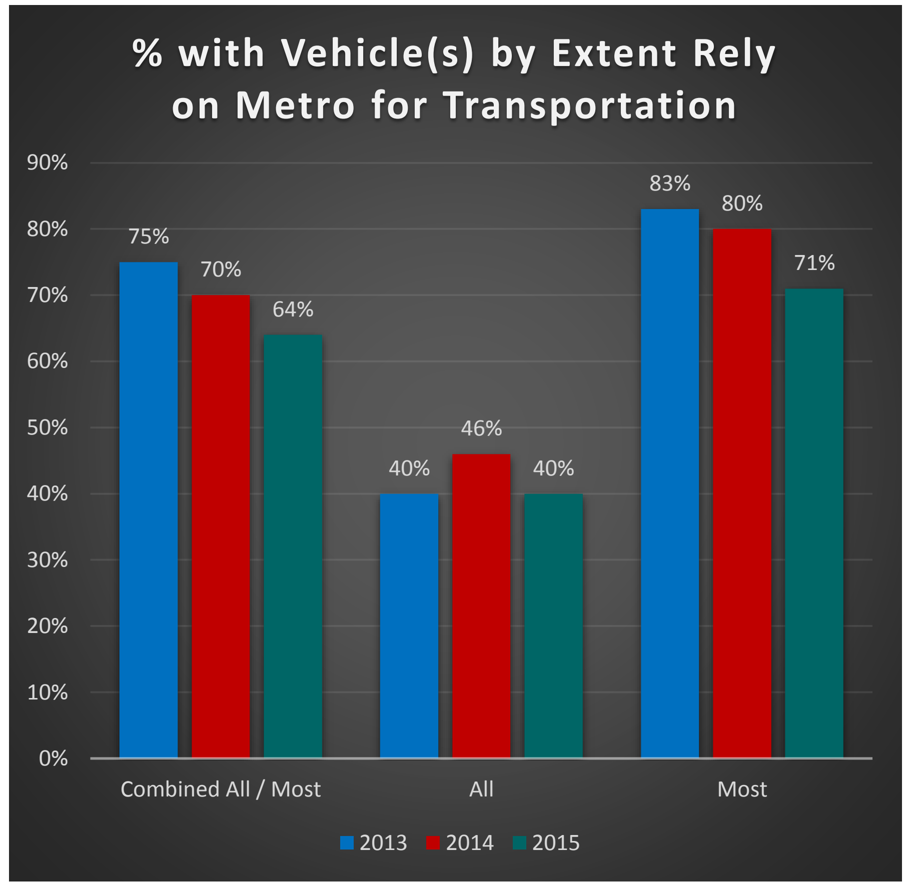
However, a relatively consistent percentage (approximately one-third) relies on Metro for all or most of their transportation.

Only one out of 10 Riders rely on Metro for all or most of their transportation needs <u>and</u> do not have access to a vehicle.

While the majority of those relying on Metro for all or most of their transportation needs have access to a vehicle, this percentage has decreased significantly over the years.



	2013	2014	2015
All	7%	9%	8%
Most	29%	22%	26%
Some / Little	64%	69%	66%



FARE PAYMENT

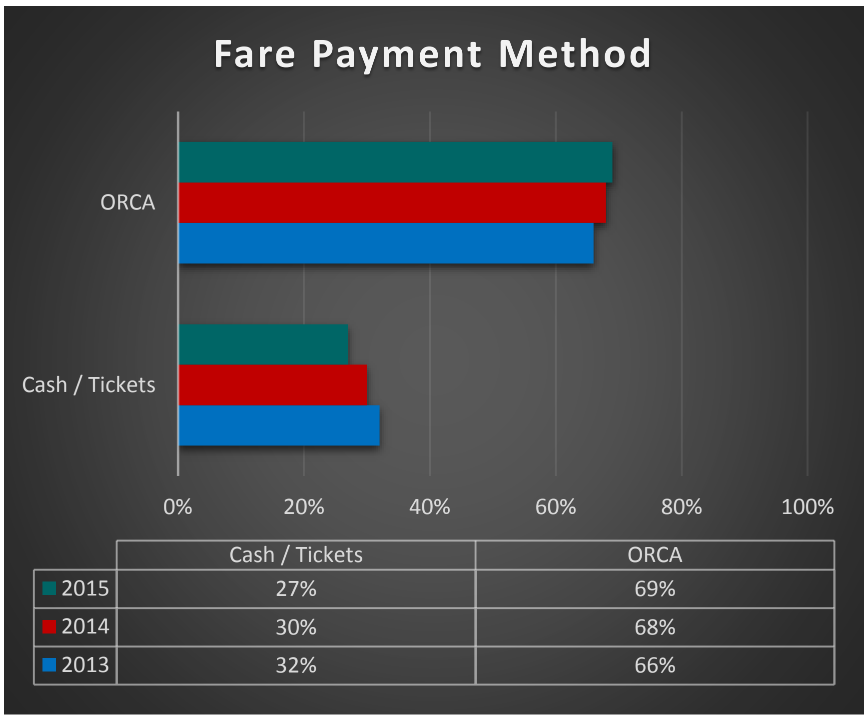
Riders continue to move towards paying their fares with ORCA. Riders' fare payment methods and the products they choose to load on their ORCA card are strongly related to the frequency with which they ride.

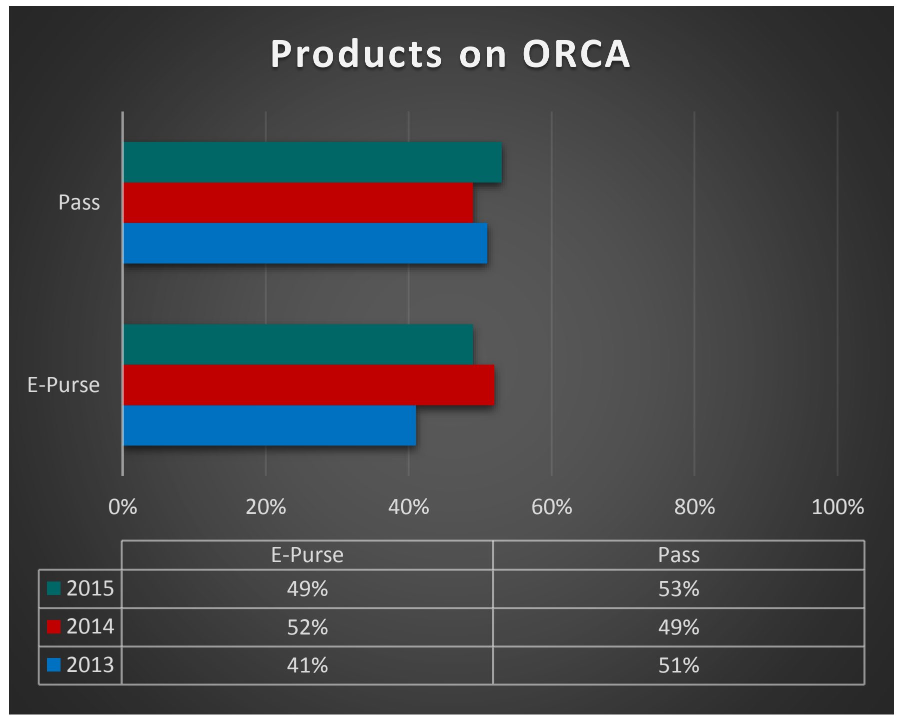
Riders' use of ORCA to pay their fare has continued to increase slowly. Use of cash or tickets has decreased since 2013.

Regular Riders are more likely than Infrequent Riders to pay with ORCA—78% compared to 51%, respectively. Eighty-five percent (85%) of all Frequent Regular Riders pay with ORCA.

Riders who pay with ORCA are somewhat more likely to have a pass than an E-Purse on their card. The percentage with a pass on their ORCA Card increased in 2015 due to a significant increase in the percentage with a monthly pass.

Regular Riders are more likely than Infrequent Riders to have a pass on their ORCA Card—61% compared to 25%, respectively.



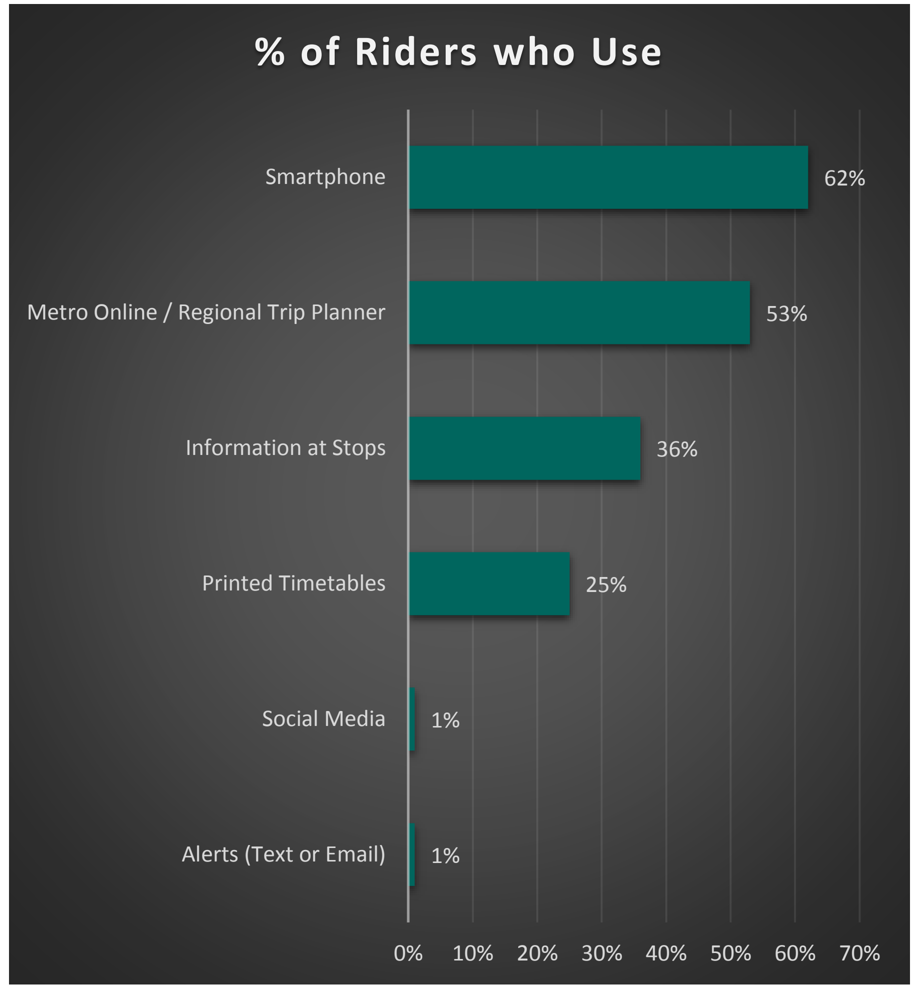


INFORMATION SOURCES

Riders rely heavily on mobile applications and online sources to get information about Metro. However, traditional sources such as information at stops and printed timetables continue to be used by those who do not own a smartphone.

Mobile applications and online sources are the most commonly used sources of information.

While the majority of Riders now use their smartphone to get information about Metro, about one out of six (16%) surveyed Riders do not own a smartphone.



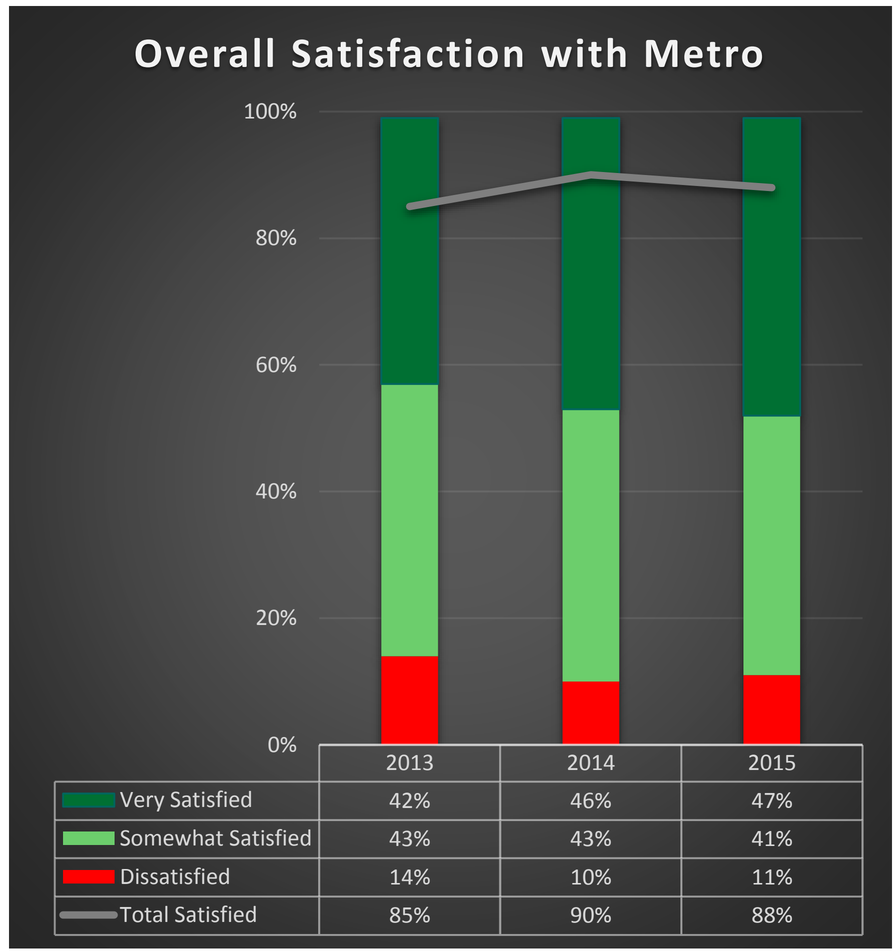
OVERALL SATISFACTION WITH METRO

The vast majority of Riders continue to be satisfied with Metro. Moreover, a greater percentage are "very" as opposed to "somewhat" satisfied.

After increasing significantly in 2014 and reversing the downward trend first noted in 2011, overall satisfaction with Metro was relatively stable. The percentage of satisfied Regular Riders increased but was offset by a decrease in total satisfaction among Infrequent Riders.

	Total Satisfied		
	2013	2014	2015
Regular Riders	88%	88%	90%
Infrequent Riders	80%	91%	85%

A greater percentage of Riders are "very" as opposed to "somewhat" satisfied with Metro and that difference is increasing. The percentage "very" satisfied remains below the peak (50%) in 2011.

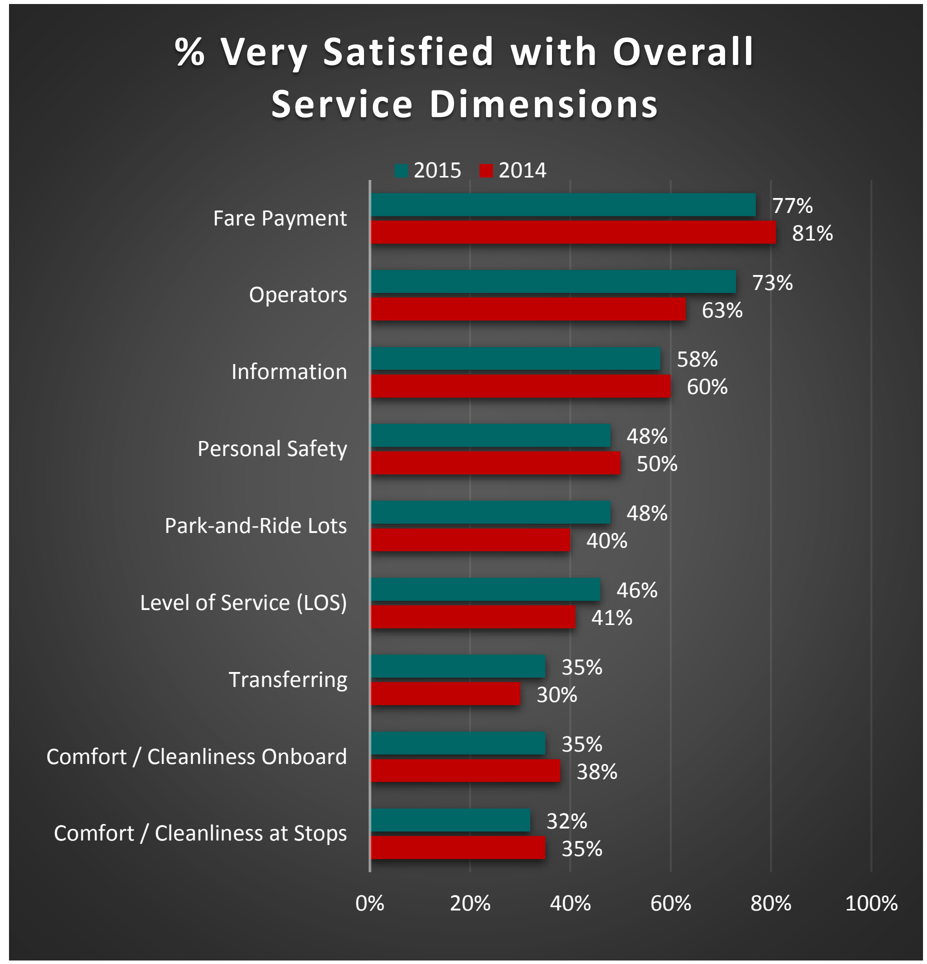


SATISFACTION WITH INDIVIDUAL ELEMENTS OF SERVICE

Riders are most satisfied with fare payment and coach operators, and least satisfied with comfort and cleanliness on-board and at stops.

Consistent with the trend in overall satisfaction, the percentage of Riders "very" satisfied with each of the nine primary Service Dimensions was relatively stable. (The Service Dimensions are composites of the 42 specific service elements measured in this study.) However, there were some significant increases for:

- Metro operators,
- Park-and-ride lots,
- Level of service, and
- Transferring.



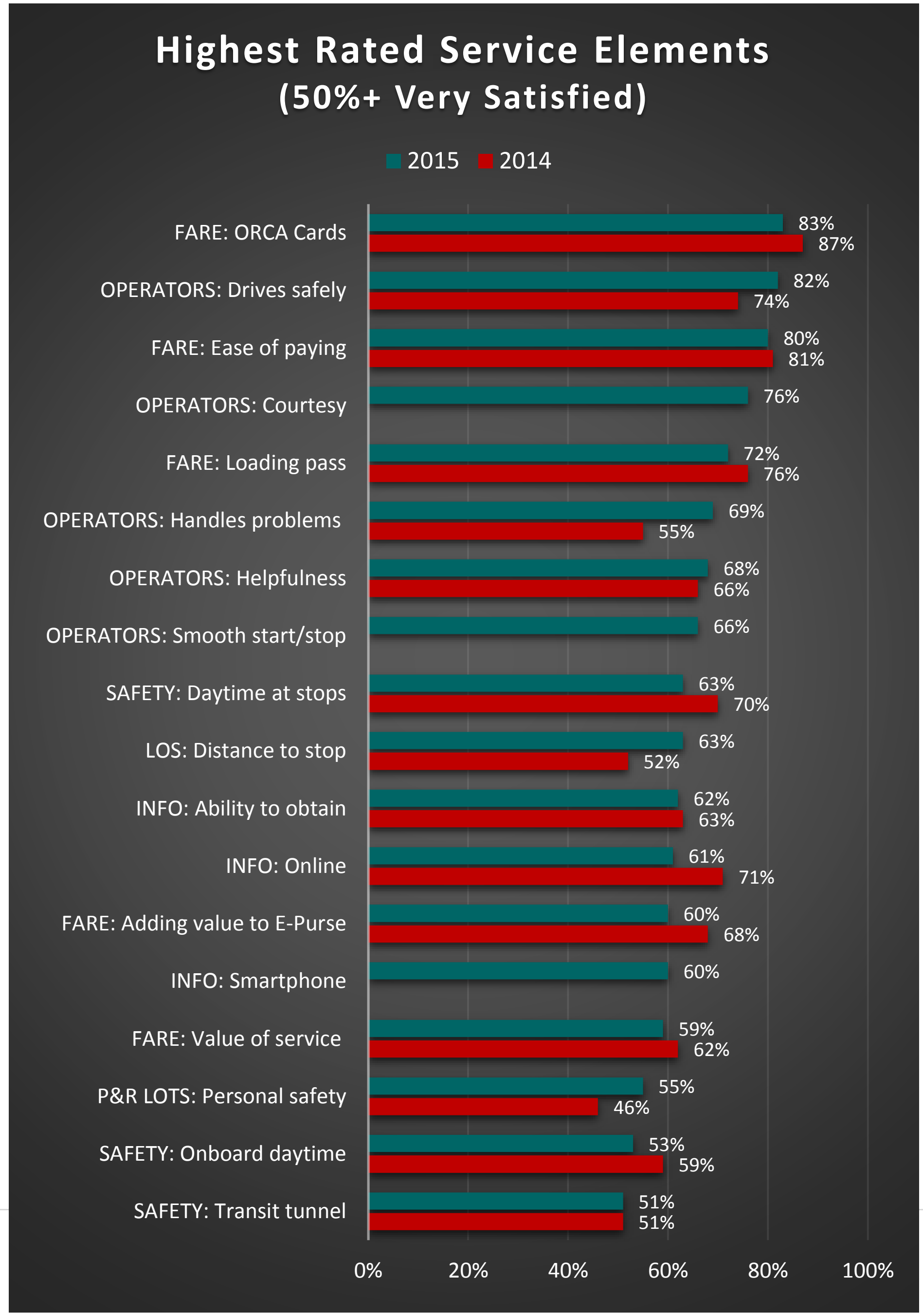
Eighteen of the 42 service elements achieved satisfaction ratings above 50% "very" satisfied. With the exception of personal safety at park-and-ride lots, all were also above 50% in 2014 as well. (Note that operator courtesy and availability of information via smartphones were rated for the first time in 2015.)

In general, ratings were similar to 2014. The percentage of "very" satisfied ratings increased significantly for:

- Personal safety at park-and-ride lots,
- How effectively operators handle problems on the buses when they occur,
- Distance from home to stops, and
- Operators' safe operation of their vehicles.

The percentage of "very" satisfied ratings decreased significantly for:

- The availability of information about Metro online,
- Ease of adding value to an E-Purse,
- Daytime safety while waiting for bus,
- Daytime safety onboard, and
- Overall satisfaction with ORCA.

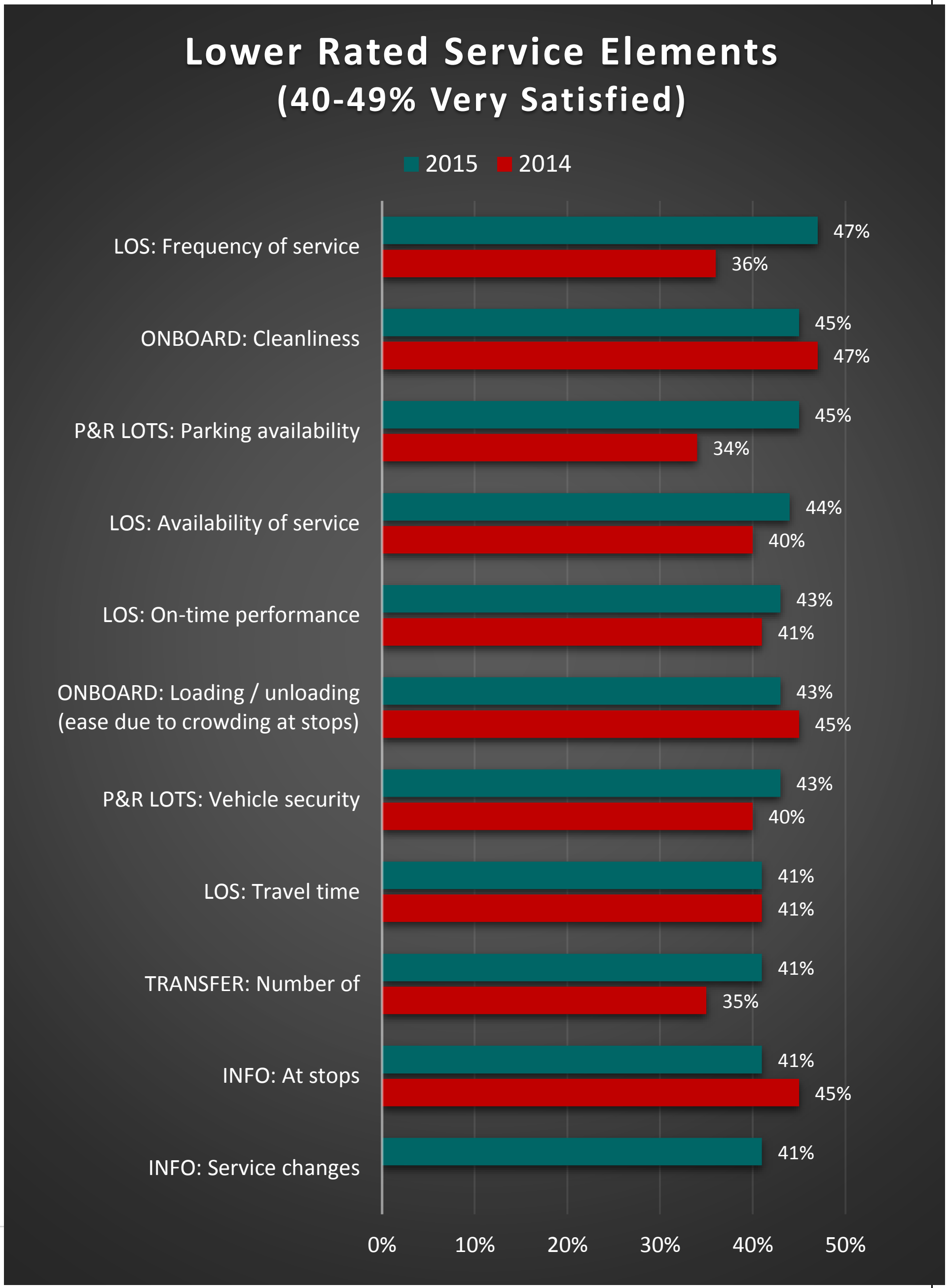


A second tier of service elements received ratings below 50% "very" satisfied but still above the lowest rated service elements (between 40 and 49% "very" satisfied). With the exception of three, all of these services were within this tier in 2014 as well.

The element regarding notifications of information about service changes was not measured in 2014 but received a rating of 41% "very" satisfied.

The percentage of Riders "very" satisfied increased significantly for:

- Frequency of service,
- Availability of parking at park-and-ride lots, and
- Number of transfers.

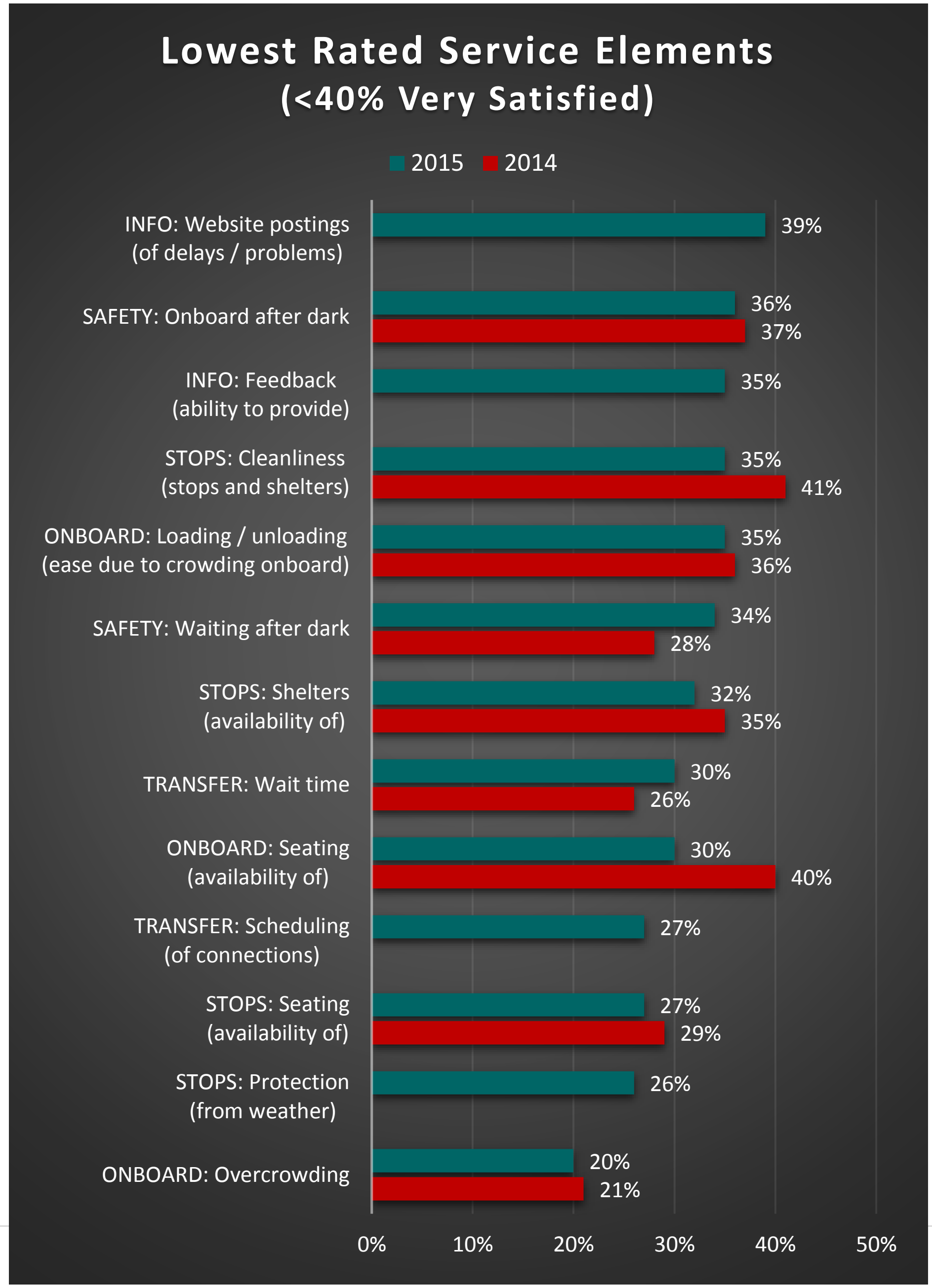


Fewer than two out of five Riders were "very" satisfied with 13 (of the 42) service elements. Four of these items were new in 2015:

- Protection from the weather when waiting, and scheduling of connections when transferring received some of the lowest ratings. Scheduling of connections received a somewhat lower rating than wait times when transferring.
- Two information items also fell into this tier: website postings of delays or problems, and the ability to provide feedback (e.g., complaints or commendations).

The remaining items were in this tier in 2014 as well.

- While still relatively low, the percentage of "very" satisfied riders increased for safety while waiting after dark.
- Satisfaction decreased significantly for availability of seating on vehicles (and overcrowding is the element with the least satisfaction), and also decreased for the cleanliness of stops and shelters.

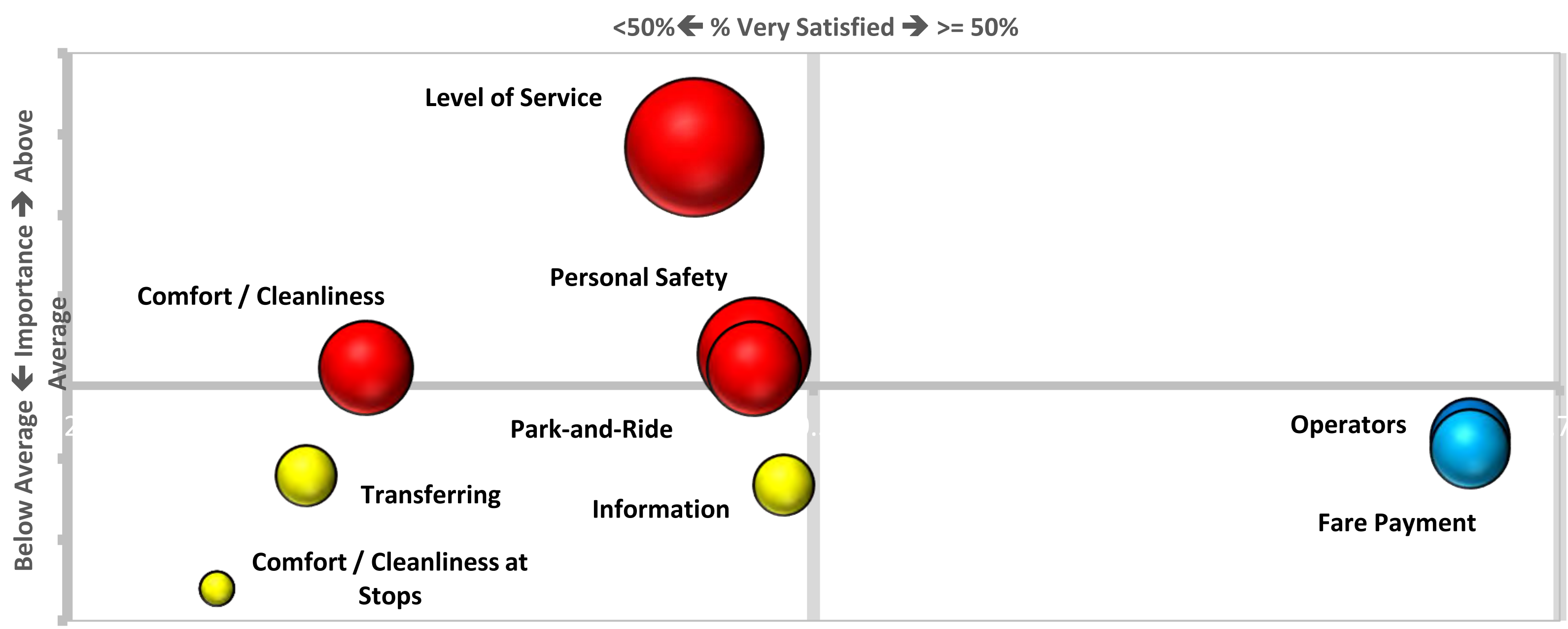


KEY DRIVERS ANALYSIS

"Level of Service" elements, notably travel time, availability of service, and on-time performance, are the most important target areas for continued improvements. Personal safety, particularly after dark, and comfort of the vehicles, notably at it relates to crowding, are also important targets for improvements.

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

Level of Service is by far the single largest driver of Riders' overall satisfaction with and perceptions of Metro. Satisfaction is below 50% and therefore the Level of Service should be a priority for improvement. Personal safety is the second key driver. Satisfaction with safety after dark is significantly lower than daytime safety and should be a continued priority. While Comfort and Cleanliness On-Board is somewhat less important, it has one of the lowest percentages of "very" satisfied ratings and should also be considered a primary target for improvement.



All elements within the Level of Service dimension are key drivers.

- Travel time is by far the most important driver (nearly twice as important as any other element) and receives the lowest rating.
- Improvements in frequency of service may contribute to the somewhat lower importance of this element of service than seen in previous years.

All elements of service within the Personal Safety dimension are key drivers.

- Safety after dark should be a primary focus. However, daytime safety should be carefully monitored as satisfaction decreased in 2015.

All elements of service within the Comfort and Cleanliness Onboard dimension are key drivers.

- Inside cleanliness is the most significant driver.

Other target areas for improvement include:

- Vehicle security and parking availability at park-and-ride lots,
- Number of transfers,
- Ability to provide feedback, and
- Protection from the weather.

The table to the right is ordered by the importance of the Dimensions followed by the importance of the Elements within the dimension. Elements in bold are significant drivers. Some Elements are not included due to small base sizes. The dimension scores are based on all elements, including new ones this year.

	Importance Rank	% Very Satisfied	Strategy
Level of Service	**1**	**46%**	**Improve**
Travel Time	1	41%	Improve
Availability of Service	2	44%	Improve
On-Time Performance	3	43%	Improve
Distance to Stop	4	63%	Monitor
Frequency of Service	5	47%	Strategically Target
Personal Safety	**2**	**48%**	**Improve**
Onboard During the Day	1	53%	Maintain
Onboard After Dark	2	36%	Improve
Waiting at Stops After Dark	3	34%	Improve
Waiting at Stops During the Day	4	63%	Monitor
Downtown Transit Tunnel	5	51%	Monitor
Comfort and Cleanliness Onboard	**3**	**35%**	**Improve**
Inside Cleanliness	1	45%	Improve
Ease of Loading/Unloading (due to crowding at stops)	2	43%	Improve
Overcrowding	3	20%	Improve
Ease of Loading/Unloading (due to crowding onboard)	4	35%	Strategically Target
Availability of Seating	5	30%	Strategically Target
Park-and-Ride Lots	**4**	**48%**	**Improve**
Personal Safety	1	55%	Maintain
Vehicle Security	2	43%	Improve
Parking Availability	3	45%	Improve
Metro Operators	**5**	**72%**	**Monitor**
Handles Problems Effectively	1	69%	Maintain
Courtesy	2	76%	Maintain
Operates Vehicles Safely	3	82%	Maintain
Starts / Stops Vehicles Smoothly	4	66%	Monitor
Helpfulness with Information	5	68%	Monitor
Fare Payment	**6**	**72%**	**Monitor**
Value of Service	1	59%	Maintain
ORCA Cards	2	83%	Monitor
Ease of Paying Fares (when boarding)	3	80%	Monitor
Transferring	**7**	**33%**	**Strategically Target**
Number of Transfers	1	41%	Improve
Scheduling of Connections	2	27%	Strategically Target
Wait Time when Transferring	3	30%	Strategically Target
Information Sources	**8**	**49%**	**Strategically Target**
Ability to Provide Feedback	1	35%	Improve
Availability of Information Online	2	61%	Maintain
Notification of Service Changes	3	41%	Strategically Target
Availability of Information at Stops	4	41%	Strategically Target
Availability of Information via Smartphones	5	60%	Monitor
Comfort and Cleanliness at Stops	**9**	**30%**	**Strategically Target**
Protection from the Weather	1	26%	Improve
Availability of Shelters	2	32%	Improve
Cleanliness of Stops / Shelters	3	35%	Strategically Target
Availability of Seating	4	27%	Strategically Target

STUDY BACKGROUND AND OBJECTIVES

King County's Department of Transportation—Transit Division (King County Metro) places high value on customer feedback and for more than 25 years has conducted an annual survey with King County residents who are Metro 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 King County households with one or more riders
- Track customer awareness and perceptions of Metro services and programs
- Identify and track demographic, attitudinal, and transit use characteristics among Riders, Non-Riders, and Commuters
- Provide insights on current and relevant topics that are a current focus of Metro's service, marketing, and communications strategies

Riders are surveyed every year; Non-Riders are generally included every other (odd-numbered) year. This year's survey (2015) includes both Riders and Non-Riders.

METHODOLOGY

Sampling

The 2015 survey was based on a random telephone (landline and cell phone) sample of 1,840 King County residents aged 16 and older. Three primary segments were interviewed. A total of 1,025 of those contacted reported that they had ridden Metro in the 30 days prior to being surveyed and completed the entire survey. The balance (815) were Non-Riders—that is had not ridden Metro in the previous 30 days. An additional 5,176 respondents were contacted but did not complete the survey as sample quotas were full; the majority of these potential respondents were Non-Riders.

Regular Riders
5 or More One-Way Rides in Past 30 Days
n = 922

Infrequent Riders
1–4 One-Way Rides in Past 30 Days
n = 103

Non-Riders
Had Not Ridden in Past 30 Days
n = 815

Regular Riders were further segmented based on their riding frequency.

Frequent Regular Riders
11+ One-Way Rides in Past 30 Days
n = 585

Moderate Regular Riders
5–10 One-Way Rides in Past 30 Days
n = 337

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

In 2015, more than half of all respondents were reached through the cell phone sample.

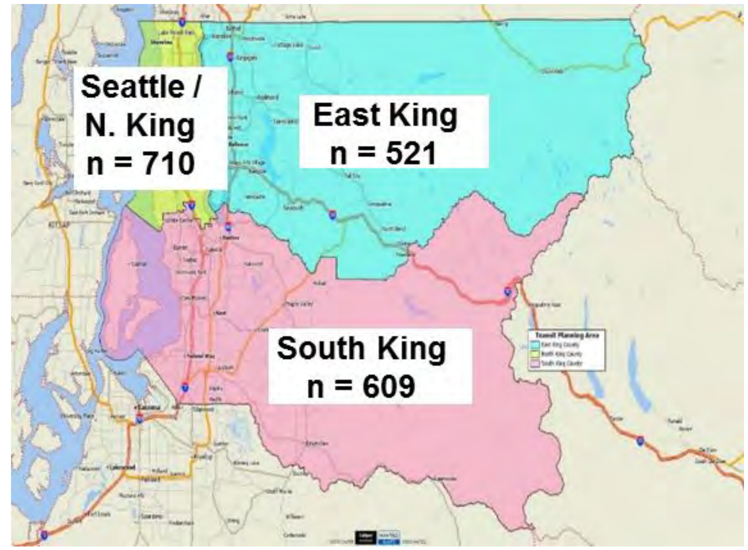
Because cell phones are considered personal devices, the individual reached on the cell phone was surveyed. For the landline sample, if the household was identified as a Regular Rider household, an attempt was made to interview the Regular Rider. If the household was identified as an Infrequent Rider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

YEAR		2011	2012	2013	2014	2015
CELL PHONE SAMPLE	#	759	536	976	457	1,021
	%	30%	44%	40%	38%	55%
LANDLINE SAMPLE	#	1,762	682	1,438	744	819
	%	79%	56%	60%	62%	45%
TOTAL	#	2,521	1,218	2,414	1,201	1,840

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

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

	COUNTYWIDE	SEATTLE/ NORTH	SOUTH KING	EAST KING
REGULAR RIDERS MINIMUM N	900	400	250	250
REGULAR RIDERS ACHIEVED	922	406	252	264
INFREQUENT RIDERS	103	666	17	20
NON-RIDERS	815	238	340	237
TOTAL	1,840	710	609	521



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

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

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

Using a 95 percent confidence level, the margin of error of the entire sample is no greater than plus or minus 2.3% percentage points. This means that if the study were duplicated in the same time frame with 1,800 different respondents, sampled in the same fashion, 95 times out of 100, the same result would occur, within the stated range. The adjacent table provides the margin of error for key subgroups in the study.

	N	MARGIN OF ERROR 95% CONFIDENCE LEVEL
TOTAL CONTACTS	7,016	±1.2%
TOTAL COMPLETES	1,840	±2.3%
SEATTLE / NORTH KING COUNTY	710	±3.7%
SOUTH KING COUNTY	609	±4.0%
EAST KING COUNTY	521	±4.3%
REGULAR RIDERS	922	±3.2%
INFREQUENT RIDERS	103	±9.7%
NON-RIDERS	815	±3.4%

Response Rates

Strict dialing protocols (up to six attempts to all working landline and four attempts to cell phones before being abandoned), highly trained interviewers, and refusal conversion attempts have been used to maintain high response rates over the years.

Contact rate (the proportion of all sample elements in which some responsible member of the housing unit [landline] or cell phone owner) was reached for the survey was 64 percent, higher than the 56 percent achieved in 2014. Contact rate by landline was higher as there is a greater likelihood of reaching someone in a multi-person landline household.

The cooperation rate (proportion of eligible units contacted that resulted in a completed or partially completed interview) was 43 percent. This is lower than 2014 due to the inclusion of Non-Riders who are more likely to refuse to complete the survey.

The overall response rate (24%) is comparable to the average response rates current achieved for telephone research studies where significant effort is made to increase response rate (Pew Research Center, "Assessing the Representativeness of Public Opinion Surveys," May 2012. [http://www.people-press.org/2012/05/15/section-1-survey-comparisons-and-benchmarks/).](http://www.people-press.org/2012/05/15/section-1-survey-comparisons-and-benchmarks/)

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

	CONTACT RATE	COOPERATION RATE	RESPONSE RATE
LANDLINE	71%	51%	33%
CELL PHONE	43%	36%	14%
TOTAL	64%	43%	24%

Survey Instrument

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

The interviews averaged 17 minutes. The survey was significantly longer for Regular and Infrequent Riders (23 minutes, respectively) than for Non-Riders (10 minutes).

All People Contacted		
• Household Ridership	• Individual Ridership	
All Respondents (Those Who Completed Survey)		
• Commute Status & Behavior	• Perceptions of Metro	• Demographics
Current Riders		
• Frequency	• Trip Purpose(s)	• Satisfaction with Service
• Transit Dependence	• Transferring	• Length of Time Riding
• Personal Travel	• Fare Payment	• Travel Behavior
• Information Sources	• Overall Satisfaction	• Personal Safety
• Management of Service Change		
Non-Riders		
• Use of Other Systems	• Use of Metro	• Potential Ridership

The survey instrument was pretested over several days. Initial pretests were focused on questionnaire wording and respondent understanding. Subsequent pretesting was used to test study assumptions including survey length and incidence. Data collection began on October 21, 2015 and continued through December 9, 2015. No interviewing was done on Thanksgiving Day or the day before or after.

Bernett Information Group was used for telephone data collection; they also did the data collection for the 2013 and 2014 surveys. A minimum of 10 percent of all interviews were monitored; NWRG project staff monitored (either live or through recordings) a minimum of 5 percent of the interviews.

Interviews were conducted in English and Spanish. The survey was translated into Spanish and administered by multilingual interviewers. One hundred twenty (120) respondents self-identified as Hispanic; a total of 17 interviews (14%) chose to complete the survey in Spanish.

Analysis and Reporting

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

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

On many questions in the survey, respondents may have answered “don’t know.” In addition, respondents have the option to refuse to answer any question. In general, “don’t know” and “refusals” are counted as missing values and are not included in the reported percentages except as noted.

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

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

When comparing changes over time, comparisons are made to the prior year. In the table below, the notation ▲in 2013 indicates that the percentage of Riders whose primary trip is a commute trip increased significantly from 2012. Similarly, the notation ▼ in 2014 indicates that the percentage of Riders whose primary trip is a commute trip decreased significantly from 2013.

	2010	2011	2012	2013	2014	2015
Commute	53%	56%	56%	60% (▲)	56% (▼)	53%

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

When comparing the differences in responses between different respondent groups, significant differences are noted by showing whether responses are significantly higher (▲) or lower (▼) than the columns identified by letter. In the table below the notation (a▲, c▲) under (b) Regular Rider indicates that the percentage of Regular Riders' whose primary trip is a commute trip is significantly higher than (a) all Riders and (c) Infrequent Riders.

	(a) ALL Riders	(b) REGULAR Rider	(c) INFREQUENT Rider
Commute	53% (b▼,c▲)	66% (a▲,c▲)	28% (a▼,b▼)

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

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

FINDINGS—MARKET SHARE

Summary

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

Topic	What We Found	What It Means
Household Market Share – King County	The proportion of households in King County that have a Rider fell from its peak of 45% in 2013 to 39% in 2015. Despite this decrease, the percentage of Regular Rider households is about the same as in 2012 and remains significantly higher than in 2010 and 2011 when only one out of four King County households were Regular Rider households.	While it appears that the decrease in market share occurred primarily between 2014 and 2015, it is possible that it began late in 2014 after the September 2014 service changes. The timing of the 2014 survey (immediately following this service change) may not have picked up some changes in behaviors as Riders were still adjusting to these changes. Ridership figures from Metro showed significant growth between 2010 and 2014, although the rate of growth began slowing in 2014. Total ridership for 2015 was up 0.8 percent over 2014; growth outside the City of Seattle was flat. Increasing ridership, in the face of decreasing in market share (measured as the percentage of households with Riders) is typically due to increases in the number of trips taken by riders.

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

Regular Rider Household: *1 or More Regular (5+ One-Way Trips) Riders in Household; Household Could Also Include Infrequent Riders*

Infrequent Rider Household: *1 or More Infrequent (1-4 One-Way Trips) Riders in Household; No Regular Riders*

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

Topic	What We Found	What It Means
Household Market Share – Seattle*	The City of Seattle saw statistically significant growth in Regular Rider households. The percentage of Rider households in Seattle is at its highest level since 2010 and above the last peak in 2012 when 64 percent of all Seattle households were Rider households.	Seattle continues to represent King County's core market. It is the most densely populated geographic area, and extensive, relatively high-frequency service has translated into very high market share. The City of Seattle accounts for just 37 percent of all King County households but 62 percent of Rider households. Addition of new services in 2015 translated into Infrequent Riders taking additional trips, thus moving to Regular Rider status, and Non-Riders starting to ride and is clearly evident in the 2 percent ridership growth reported by Metro in this area.

	Household Type	
	Rider	**Non-Rider**
2015	65%	35%
2014	62%	38%
2013	61%▲	39%
2012	64%▲	36%▼
2011	55%	45%
2010	58%	42%
	Regular Rider	**Infrequent Rider**
2015	54%▲	11%
2014	49%	13%
2013	47%▼	15%▲
2012	53%▲	11%▼
2011	41%	14%
2010	42%	16%

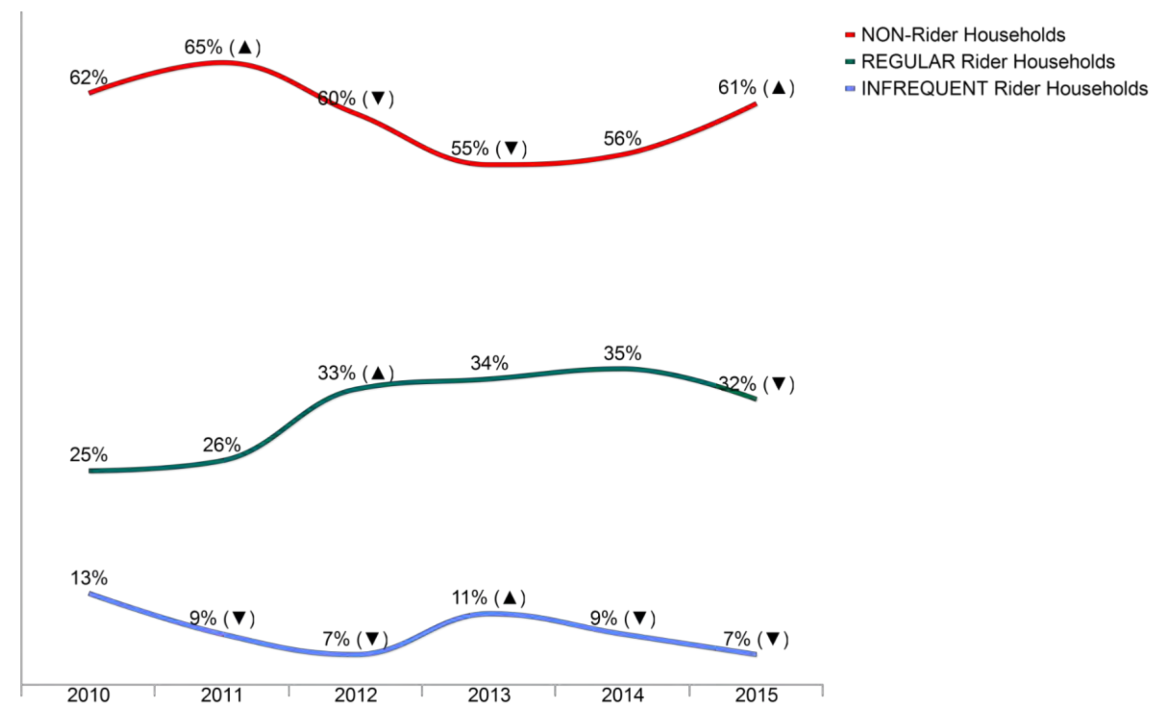
** Three zip codes in Seattle also include small areas outside of Seattle (portions of Shoreline, Richmond Beach, Kenmore); sample sizes in these areas are small*
Significant increase (▲) or (▼) from previous year

Market Share (Households with Riders)

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

- After being relatively stable for the past three years, market share (% of Regular Rider households) decreased in 2015 but remains significantly higher than 2010-2011.
    - The percentage of Infrequent Rider households has decreased steadily since 2013.
- When combined, the 3 percentage point decrease in Regular Rider households and 2 percentage point decrease in Infrequent Rider households, results in a significant increase in the percentage of Non-Rider households. The percentage of Non-Rider households remains below the peak in 2011.

Figure 1: Market Share: Countywide



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

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

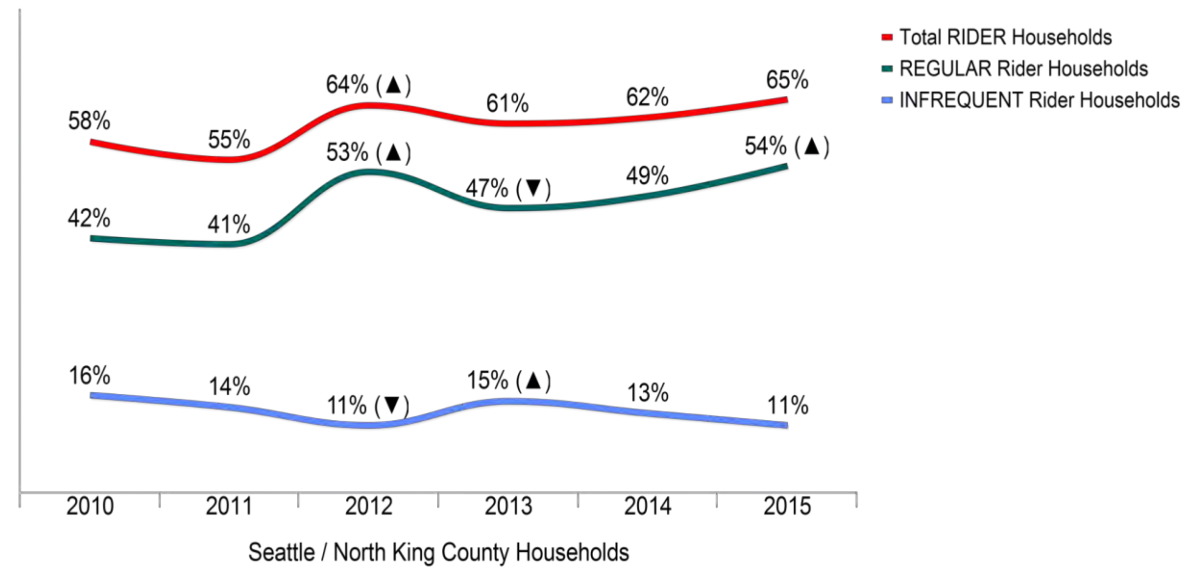
Differences by Geographic Area

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

Seattle / North King County continues to represent Metro's core market.

- It is the most densely populated.
- Nearly two out of three households are Regular Rider households
- The percentage of Regular Rider households has increased significantly since 2013, surpassing the previous record of 53 percent in 2012.
- At the same time, the percentage of Infrequent Rider households decreased and the percentage of Non-Rider households decreased, suggesting increased commitment to being a Rider versus a Non-Rider.

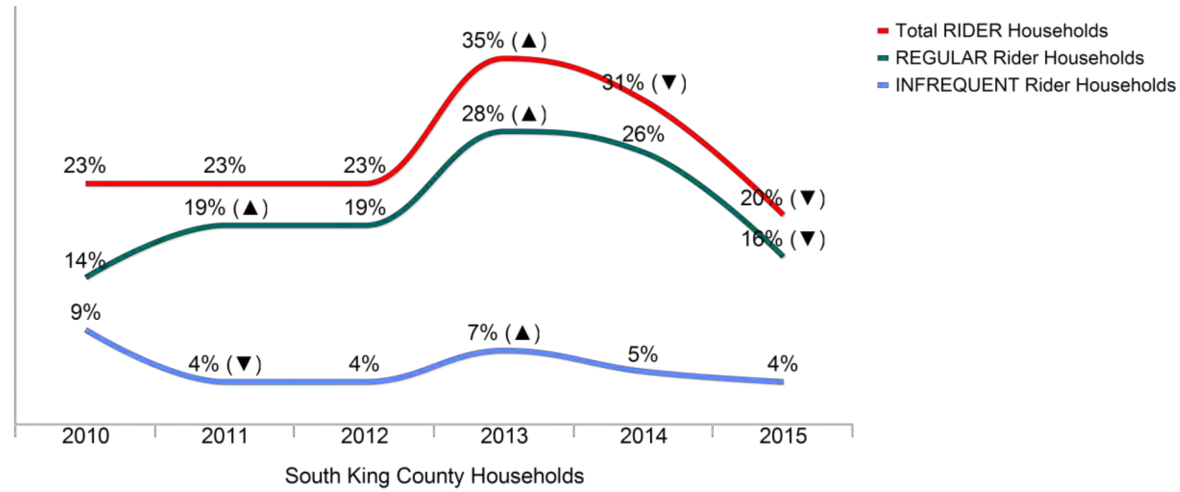
Figure 2: Market Share: Seattle / North King County



Geographically larger, South King County represents nearly the same number of households as Seattle / North King County (35% of all households).

- One out of five households in this area ride Metro.
  - The percentage of Rider households increased significantly in 2013 but began to drop 2014 and decreased again in 2015. The sharply higher rates in 2013 and 2014 may have been anomalies, and market share is again at its longer-term rate.
  - The percentage of Regular Rider households is at its lowest level since 2011 but remains higher than 2010.

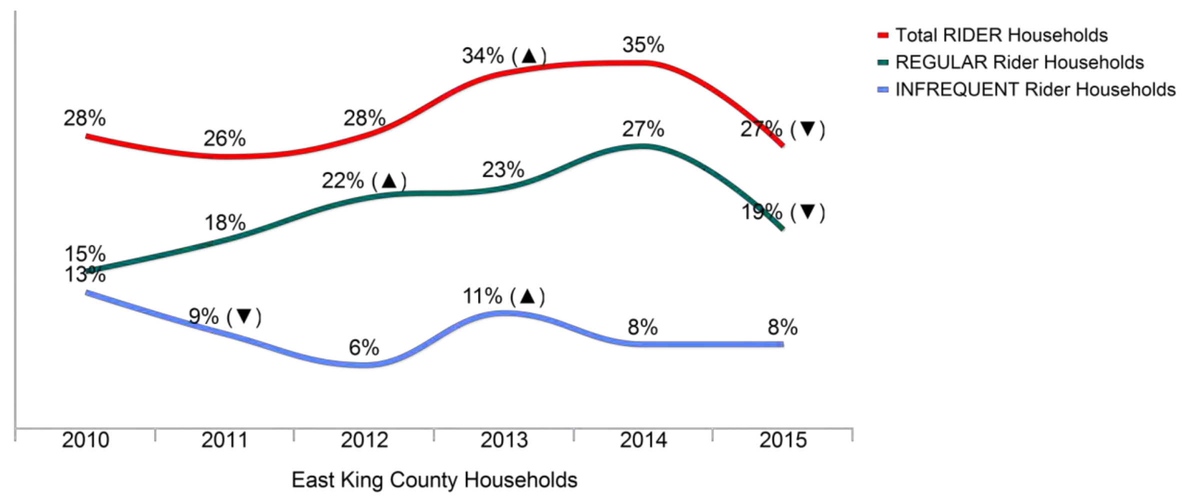
Figure 3: Market Share: South King County



East King County is also geographically large but represents the smallest number of households (27% of all households).

- The share of Regular Rider households increased steadily in this area between 2010 and 2014 and then dropped significantly in 2015, but remains significantly higher than in 2010.
- The share of Infrequent Rider households peaked in 2013.

Figure 4: Market Share: East King County



FINDINGS: RIDER AND NON-RIDER DEMOGRAPHICS

Summary

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>All Current Riders</td>
<td>Riders surveyed in 2015 generally mirror the demographic characteristics of King County's population.</td>
<td>
<table>
<tr><th></th><th>King County Population*</th><th>Current Metro Riders</th></tr>
<tr><td>Male</td><td>50%</td><td>51%</td></tr>
<tr><td>Female</td><td>50%</td><td>49%</td></tr>
<tr><td>16–17</td><td>3%</td><td>4%</td></tr>
<tr><td>18–34</td><td>31%</td><td>30%</td></tr>
<tr><td>35–54</td><td>36%</td><td>32%</td></tr>
<tr><td>55+</td><td>29%</td><td>34%</td></tr>
<tr><td>Mean</td><td>43.5</td><td>44.7</td></tr>
<tr><td>Employed</td><td>65%</td><td>67%</td></tr>
<tr><td>Not Employed</td><td>35%</td><td>33%</td></tr>
<tr><td><$35,000</td><td>24%</td><td>23%</td></tr>
<tr><td>$35K-<$55K</td><td>17%</td><td>15%</td></tr>
<tr><td>$55K–<$75K</td><td>13%</td><td>13%</td></tr>
<tr><td>$75K–<$100K</td><td>12%</td><td>17%</td></tr>
<tr><td>$100K +</td><td>34%</td><td>31%</td></tr>
<tr><td>Median</td><td>$73,035</td><td>$73,732</td></tr>
<tr><td>Caucasian**</td><td>62%</td><td>70%</td></tr>
<tr><td>Non-White**</td><td>23%</td><td>19%</td></tr>
<tr><td>Hispanic</td><td>9%</td><td>6%</td></tr>
<tr><td>Mixed Race</td><td>5%</td><td>6%</td></tr>
<tr><td>% with License</td><td>N/A</td><td>81%</td></tr>
<tr><td>% with Vehicle in Household</td><td>91%</td><td>85%</td></tr>
<tr><td colspan="3">* Source: 2014 American Community Survey three-year estimates
** Does not include Hispanic</td></tr>
</table>
</td>
<td>Not only does a significant percentage of King County households use Metro, the demographic analysis clearly demonstrates that Metro serves a broad cross-section of the County.

Metro is a major component of a complex regional transportation system that provides services to the general population, not just those who have no other options for getting around.</td>
</tr>
</table>

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr><td>Regular and Infrequent Riders</td>
<td>Nearly two out of three (65%) Riders are Regular Riders—that is, they take five or more one-way rides monthly.

With the exception of employment status, race / ethnicity, and age, there are few significant differences between Regular and Infrequent Riders.

• The average age of Regular Riders has consistently been between 42 and 44 over the years.
• Infrequent Riders are aging—in 2009, 28 percent of Infrequent Riders were 55 and older; this percentage has increased to 43 percent in 2015.

Regular Riders are significantly less likely than Infrequent Riders to have a driver's license and/or access to a vehicle.

• The percentage of Regular Riders with no vehicle access more than doubled since 2009—from 9 percent in 2009 to 19 percent in 2015.</td>
<td>
<table>
<tr><th></th><th>Regular Riders</th><th>Infrequent Riders</th></tr>
<tr><td>% of Riders</td><td>65%</td><td>35%</td></tr>
<tr><td>Male</td><td>53%</td><td>45%</td></tr>
<tr><td>Female</td><td>47%</td><td>55%</td></tr>
<tr><td>16–17</td><td>4%</td><td>4%</td></tr>
<tr><td>18–34</td><td>32%</td><td>27%</td></tr>
<tr><td>35–54</td><td>36%</td><td>27%</td></tr>
<tr><td>55+</td><td>29%▼</td><td>43%▲</td></tr>
<tr><td>Mean</td><td>43.1</td><td>47.7</td></tr>
<tr><td>Employed</td><td>68%</td><td>64%</td></tr>
<tr><td>Student</td><td>12%▲</td><td>5%▼</td></tr>
<tr><td>Retired</td><td>13%▼</td><td>22%▲</td></tr>
<tr><td>Not Employed</td><td>8%</td><td>8%</td></tr>
<tr><td><$35,000</td><td>25%</td><td>20%</td></tr>
<tr><td>$35K-<$55K</td><td>15%</td><td>16%</td></tr>
<tr><td>$55K–<$75K</td><td>13%</td><td>14%</td></tr>
<tr><td>$75K–<$100K</td><td>16%</td><td>20%</td></tr>
<tr><td>$100K +</td><td>31%</td><td>30%</td></tr>
<tr><td>Median</td><td>$72,391</td><td>$76,200</td></tr>
<tr><td>Caucasian**</td><td>65%▼</td><td>80%▲</td></tr>
<tr><td>Non-White**</td><td>20%</td><td>15%</td></tr>
<tr><td>Hispanic</td><td>7%</td><td>2%</td></tr>
<tr><td>Mixed Race</td><td>8%</td><td>2%</td></tr>
<tr><td>% with License</td><td>77%▼</td><td>91%▲</td></tr>
<tr><td>% with Vehicle in Household</td><td>81%▼</td><td>91%▲</td></tr>
<tr><td colspan="3">▲ / ▼ indicates a statistically significant difference between respondent group
** Does not include Hispanic</td></tr>
</table>
</td>
<td>Regular and Infrequent Riders are two distinct segments demographically and, as shown in the next section, have very different travel behaviors.

Metro's Regular Riders are clearly younger and are likely to have different values and attitudes toward riding as well as different needs and expectations for service. While the majority continue to have access to a vehicle, this percentage has decreased significantly, suggesting a conscious effort to do without a car or use alternatives to their own vehicle (car sharing, Car2Go, rentals, etc.).

As people age, they may choose to use Metro less often. This could be a conscious choice to use other modes or they may be taking fewer trips by any mode.</td></tr>
</table>

Regular Riders

More than three out of five Regular Riders surveyed were Frequent Regular Riders—that is, they take 11 or more one-way rides monthly.

- South King County has the highest percentage of Frequent Regular Riders—seven out of ten (70%) Riders are Frequent Regular Riders.

With the exception of age and employment status, there are few demographic differences between Frequent and Moderate Regular Riders.

Frequent Regular Riders are:

- More likely to be employed.
- Younger than Moderate Regular Riders, with a relatively high percentage between the ages of 35 and 54. The average age of Frequent Regular Riders is 42.

Moderate Regular Riders are

- Less likely to be employed; one out of five are retired.
- Older than Frequent Regular Riders (average age 44) but younger than Infrequent Riders (average age 48) and Non-Riders (average age 53).

	Frequent Regular Riders	Moderate Regular Riders
% of Regular Riders	62%	38%
16–17	4%	4%
18–34	32%	32%
35–54	38%▲	31%▼
55+	26%▼	33%▲
Mean	42.2▼	44.4▲
Employed	75%▲	58%▼
Student	11%	13%
Retired	8%	19%
Not Employed	6%▼	10%▲

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

The difference in age between Frequent and Moderate Regular Riders as well as between Infrequent and Non-Riders suggests that as Riders age, they use Metro less often. As noted above this could be a result of using different modes of transportation or a decline in actual trip taking by any mode.

The differences in age between the three rider segments (Frequent Regular, Moderate Regular, and Infrequent Riders) and corresponding employment status suggest opportunities for generational segmentation and marketing communications.

Topic	What We Found	What It Means
Low-Income Riders	Nearly one out of four (23%) Riders have a household income that is below $35,000—that is, are Low-Income Riders. Low-Income Riders are: • More likely to be female than male. • Somewhat older due to a higher percentage 55 years of age and older and a lower percentage of those between the ages of 35 and 54. • Less likely to be employed. Significant percentages are students or retired. • Significantly less likely to have a driver's license and/or access to a vehicle.	King County Metro provides an important mobility service for those who have limited options for travel. This is a diverse segment, notably in terms of their age and employment status and is likely to have varying travel needs.

	≤$35K	>$35k
% of Riders	23%	77%
Male	42%▼	53%▲
Female	58%▲	47%▼
16–17	4%	3%
18–34	31%	30%
35–54	25%▼	36%▲
55+	39%▲	31%▼
Mean Age	45.4	44.5
Employed	37%▼	78%▲
Student	17%▲	7%▼
Retired	27%▲	11%▼
Not Employed	19%▲	4%▼
Median	$18,182	$90,376
Caucasian**	65%▼	72%▲
Non-White**	20%	18%
Hispanic	8%	5%
Mixed Race	7%	5%
% with License	56%▼	90%▲
% with Vehicle in Household	55%▼	92%▲

▲ / ▼ *indicates a statistically significant difference between respondent groups*
*** Does not include Hispanic*

Topic	What We Found		What It Means
Non-Riders	Non-Riders are older than Riders. • Nearly half of all Non-Riders are 55 years of age and older. • Only one out of five Non-Riders are under the age of 35. In keeping with their age, a significant percentage (32%) of Non-Riders are retired. While their median incomes are similar, a greater percentage of Riders have household incomes below $35,000 while a higher percentage of Non-Riders have household incomes between $35,000 and $55,000. Nearly all Non-Riders have a driver's license and/or access to a vehicle.	(see table below)	Access to one or more vehicles is the characteristic that most clearly distinguishes Non-Riders from Riders. Employment status is also a major distinguishing characteristic. This would suggest that as individuals age and/or retire they are less likely to consider Metro as a transportation option. While frequency of riding would most likely be lower, Metro should focus on retaining those who currently ride to continue riding even as their lifestyles change.

	Non-Riders	Metro Riders
Male	48%	51%
Female	52%	49%
16–34	20%	34%▲
35–54	32%	32%
55+	48%▲	34%▼
Mean Age	52.9	44.7
Employed	55%	67%
Not Employed	45%▲	33%
<$35,000	18%▼	23%▲
$35K-<$55K	21%▲	15%▼
$55K–<$75K	14%	13%
$75K–<$100K	13%▼	17%▲
$100K +	34%	31%
Median	$73,281	$73,732
Caucasian**	70%	70%
Non-White**	17%	19%
Hispanic	7%	6%
Mixed Race	8%	6%
% with License	95%▲	81%▼
% with Vehicle in Household	96%▲	85%▼

▲ / ▼ *indicates a statistically significant difference between respondent groups*
*** Does not include Hispanic*

Demographic Characteristics: Riders and Non-Riders

There are significant differences in the demographic characteristics of the different Rider and Non-Rider segments.

Gender

Regular Riders are more likely than Infrequent Riders and Non-Riders to be men.

- Moreover, Regular Riders are more likely than the general population in King County to be men.

Age

Riders are significantly younger than Non-Riders.

- Moreover, Regular Riders are significantly younger than Infrequent Riders.
- Non-Riders are by far the oldest segment; nearly half are 55 years of age and older.
- The age distribution of Regular Riders is almost the same as the age distribution of the general population in King County while the percentage of Non-Riders and, to a lesser extent, Infrequent Riders who are older (55+) is significantly higher than the general population.

Employment Status

Three out of five respondents are employed (full-time, part-time, or self-employed).

- Riders are significantly more likely than Non-Riders to be employed or students.
    - In addition, Regular Riders are more likely than Infrequent Riders to be employed or students.
- Reflecting their older age, nearly one out of three Non-Riders are retired.
- The percentage of Riders who are employed is nearly the same as the percentage of the general population in King County.

Income

There are no significant differences in median income across the different Rider and Non-Rider segments.

- Regular Riders are more likely than Non-Riders to have household incomes below $35,000.

Household Composition

There are no significant differences in household composition between Riders and Non-Riders. Moreover, the household composition of both Riders and Non-Riders is similar to the general population.

- While a small segment, Infrequent Riders are more likely than Regular Riders and Non-Riders to live alone.

Race / Ethnicity

There are few significant differences between Riders' and Non-Riders' race / ethnicity.

- Riders, notably Regular Riders, are more likely than Non-Riders to be black. Blacks are somewhat under-represented in the total sample.

Regular Riders are more diverse than Infrequent Riders.

- Regular Riders are less likely than Infrequent Riders to be white, and more likely to be black, Hispanic, or of mixed race.

Vehicle Access

While the majority of Riders have a driver's license and/or access to a vehicle, Riders are significantly less likely than Non-Riders to have a license or vehicle access.

- Nearly one out of four Regular Riders do not have a driver's license and one out of five do not have access to a vehicle.

Table 1: Demographic Characteristics of Riders and Non-Riders

	All Respondents (n = 1,840; n_w = 1,840) (a)	All Riders (n = 1,025; n_w = 1,025) (b)	Regular Riders (n = 922; n_{rw} = 669) (c)	Infrequent Riders (n = 103; n_{rw} = 356) (d)	Non-Riders (n = 815; n_w =1,207) (e)	General Population
GENDER						
MALE	49% (c▲)	51%	53% (a▲, e▲)	45%	48% (c▼)	50%
FEMALE	51% (c▼)	49%	47% (a▼, e▼)	55%	52% (c▲)	50%
AGE						
16–17	2% (b▼, c▼)	4% (a▲, e▲)	4% (a▲, e▲)	4%	1% (b▼, c▼, d▼)	3%
18–34	23% (b▼, c▼, e▼)	30% (a▲, e▲)	32% (a▲, e▲)	27%	19% (a▼, b▼, c▼)	31%
35–54	32%	32%	36%	27%	32%	36%
55+	43% (b▲, c▲, e▼)	34% (a▲, c▲, e▼)	29% (a▼ , b▼▲, d▼, e▼)	43% (c▲)	48% (a▲, b▲, c▲)	29%
MEAN	50.0	44.7	43.1	47.7	52.9	43.5

	All Respondents (n = 1,840; n_w = 1,840) (a)	All Riders (n = 1,025; n_w = 1,025) (b)	Regular Riders (n = 922; n_{rw} = 669) (c)	Infrequent Riders (n = 103; n_{rw} = 356) (d)	Non-Riders (n = 815; n_w =1,207) (e)	General Population
EMPLOYED	59% (b▼, c▼)	67% (a▲, e▲)	68% (a▲, e▲)	64%	55% (b▼, c▼)	65%
STUDENT	5% (b▼, c▼, e▲)	10% (a▲, e▲)	12% (a▲, d▲, e▲)	5% (c ▼)	3% (a▼, b▼, c▼)	N/A
RETIRED	26% (b▲, c▲, a▼)	16% (a▼, c▲, e▼)	13% (a▼, b▼, d▼, e▼)	22% (c▲)	32% (a▲, b▲, c▲)	
OTHER	10% (c▲)	8% (a▼)	8% (a▼, e▼)	8%	11% (b▲, c▲)	
INCOME						
<$35K	20% (c▼)	23% (e▲)	25% (a▲, e▲)	20%	18% (b▼, c▼)	24%
$35K –$55K	19% (b▲, c▲)	15% (a▼, e▼)	15% (a▼, e▼)	16%	21% (b▲, c▲)	17%
$55K –$75K	14%	13%	13%	14%	14%	13%
$75K –$100K	15%	17% (e▲)	16%	20%	13% (b▼)	12%
$100K+	33%	31%	31%	30%	34%	34%
MEDIAN	$73,442	$73,732	$72,391	$76,200	$73,281	$73,035
HOUSEHOLD COMPOSITION						
% SINGLE FAMILY	27% (c▲, d▼)	30% (c▲, d▼)	21% (c▲, d▼)	46% (b▲, b▲, c▲, b▲,)	26% (c▲, d▼)	31%
MEAN # IN HOUSEHOLD	2.50	2.47	2.65	2.12	2.51	2.44
RACE / ETHNICITY						
CAUCASIAN ALONE	70% (c▼, d▼)	70% (c▲, d▼)	65% (a▼, b▼, d▼)	80% (a▲, ▲b, c▲, e▲)	70% (d▼)	62%
ASIAN ALONE	14%	14%	14%	13%	14%	16%
BLACK ALONE	3% (c▼)	5% (e▲)	6% (a▲, e▲)	2%	2% (b▼, c▼)	7%
HISPANIC	6%	6%	7% (d▲)	2% (c▼)	7%	9%
MIXED RACE / OTHER	7%	6%	8%▲	2%▲	8%	5%
VEHICLE ACCESS						
% W/ LICENSE	90% (b▲, c▲, e▼)	81% (a▼, c▲, d▼, e▼)	77% (a▼, b▼, d▼, e▼)	91% (b▲, c▲)	95% (a▲, b▲, c▲)	91%

% W/ VEHICLES	92% (b▲, c▲, e▼)	85% (a▼, c▲, e▼)	81% (a▼, b▼, d▼, e▼)	91% (c▲)	96% (a▲, b▲, c▲)	N/A
MEAN # VEHICLES	1.96	1.61	1.52	1.78	2.14	N/A

Employed includes those working full- or part-time (including students who work full- or part-time) or self-employed or work at home. Student includes full-time students (not working).
Columns may to more or less than 100% due to rounding
▲ / ▼ indicates a statistically significant difference(s) between respondent groups

Changing Demographics: Riders and Non-Riders

Age

Reflecting the general characteristics of the population, those surveyed are increasingly older. However, this varies significantly between Riders and Non-Riders.

- The age distribution of Regular Riders has varied little over the years. Regular Riders are primarily between the ages of 18 and 54; average age is between 43 years of age.
- Non-Riders and, to a lesser extent, Infrequent Riders have been older than Regular Riders. This difference has been increasing.
  - The majority of Infrequent Riders are 35 years of age and older, but there is a significant increase in the percentage of Infrequent Riders who are 55 years of age and older.
  - Nearly half of all Non-Riders are 55 years of age and older—up from one-third in 2009 and 2011. The increase of older respondents in this year's sample likely contributed to the declining ridership incidence outside of Seattle.

Table 2: Changing Demographics: Age of Riders and Non-Riders

		2009	2011	2013	2015
All Riders & Non-Riders	16–34	28%	28%	27%	25%
	35–54	40%	40%	36%▼	32%▼
	55+	32%	32%	36%▲	43%▲
	MEAN	47.6	47.4	48.4	50.0
Regular Riders	16–34	31%	37%	37%	36%
	35–54	41%	39%	37%	36%
	55+	27%	24%	26%	29%
	MEAN	44.4	42.7	42.4	43.1
Infrequent Riders	16–34	35%	35%	32%	31%
	35–54	37%	32%	35%	27%▼
	55+	28%	32%	33%	43%▲
	MEAN	44.6	46.3	46.9	47.7
Non-Riders	16–34	26%	25%	23%	20%▼
	35–54	41%	41%	36%▼	32%▼
	55+	34%	34%	40%▲	48%▲
	MEAN	48.9	48.7	50.9▲	52.9▲

Columns may sum to more or less than 100% due to rounding
▲ / ▼ indicates a statistically significant change from previous year

Employment Status

The changes in employment status are generally consistent with the overall trends in employment and the aging population.

- The percentage of all Riders and Non-Riders who were employed increased significantly between 2009 and 2011, but decreased significantly in 2015, due primarily to a significant decrease among Non-Riders.
  - Regular Riders are significantly more likely than Non-Riders to be employed. The percentage of employed Regular Riders has not varied significantly over the years.
- The percentage of all Riders and Non-Riders who are retired has been increasing since 2011.
  - This increase is due primarily to the significant increase in retired Non-Riders since 2011. The percentage of retired Infrequent Riders has also been increasing but is not statistically significant due to smaller sample sizes.

Table 3: Changing Demographics: Employment Status of Riders and Non-Riders

		2009	2011	2013	2015
All Riders & Non-Riders	Employed	63%	66%▲	65%	59%▼
	Student	6%	5%	6%	5%
	Retired	16%	16%	19%▲	26%▲
	Not Working	15%	13%▼	10%▼	10%
Regular Riders	Employed	69%	72%	73%	68%
	Student	9%	8%	10%	12%
	Retired	11%	8%	8%	13%
	Not Working	11%	11%	9%	8%
Infrequent Riders	Employed	64%	63%	60%	64%
	Student	9%	9%	8%	5%
	Retired	14%	17%	21%	22%
	Not Working	13%	11%	11%	8%
Non-Riders	Employed	62%	65%▲	64%	55%▼
	Student	4%	3%	4%	3%
	Retired	17%	18%	22%▲	31%▲
	Not Working	16%	13%▼	10%▼	11%

Employed includes those working full- or part-time (including students who work full- or part-time) or self-employed or work at home. Student includes full-time students (not-working).
Columns may to more or less than 100% due to rounding
▲ / ▼ indicates a statistically significant change from previous year

Household Income

Household incomes decreased between 2009 and 2011 and began to increase in 2013. The increase between 2013 and 2015 is significant and reflects the rapidly growing economy in King County.

Table 4: Changing Demographics: Riders' and Non-Riders' Household Income

		2009	2011	2013	2015
All Riders & Non-Riders	<$35,000	19%	23%▲	23%	20%▼
	$35,000—<$55,000	19%	18%	16%	19%
	$55,000—<$75,000	15%	15%	17%	14%▼
	$75,000—<$100,000	19%	17%▼	15%	15%
	$100,000+	29%	27%	29%	33%▲
	Median	$73,792	$68,127	$69,277	$73,422
Regular Riders	<$35,000	25%	30%▲	27%	25%
	$35,000—<$55,000	18%	20%	17%	15%
	$55,000—<$75,000	15%	14%	18%▲	13%▼
	$75,000—<$100,000	16%	13%	13%	16%▲
	$100,000+	27%	22%▼	25%	31%▲
	Median	$66,404	$56,786	$62,642	$72,391
Infrequent Riders	<$35,000	20%	24%	26%	20%
	$35,000—<$55,000	16%	12%	15%	16%
	$55,000—<$75,000	16%	15%	17%	14%
	$75,000—<$100,000	19%	17%	14%	20%
	$100,000+	28%	32%	29%	30%
	Median	$73,649	$74,091	$68,400	$76,200
Non-Riders	<$35,000	17%	21%	21%	18%
	$35,000—<$55,000	19%	18%	16%	21%
	$55,000—<$75,000	15%	15%	17%	14%
	$75,000—<$100,000	20%	17%	16%	13%
	$100,000+	30%	28%	30%	34%
	Median	$75,793	$70,000	$72,400	$73,281

Columns may to more or less than 100% due to rounding
▲ / ▼ indicates a statistically significant change from previous year

Vehicle Access

While still relatively small (<10%), the percentage of Riders and Non-Riders without access to a vehicle has increased steadily over the years.

- Nearly one out of five Regular Riders currently do not have access to a vehicle—more than double the figure in 2009. In addition, the percentage of Regular Riders with a driver's license has decreased significantly.

Table 5: Changing Demographics: Riders' and Non-Riders' Access to Vehicle

		2009	2011	2013	2015
All Riders & Non-Riders	% with License	93%	93%	92%	90%
	% with No Vehicle	2%	4%	6% ▲	8% ▲
Regular Riders	% with License	83%	83%	82%	77% ▼
	% with No Vehicle	9%	13%	14%	19% ▲
Infrequent Riders	% with License	90%	89%	93%	91%
	% with No Vehicle	2%	6%	7%	9%
Non-Riders	% with License	95%	96%	96%	95%
	% with No Vehicle	<1%	2% ▲	3% ▲	4% ▲

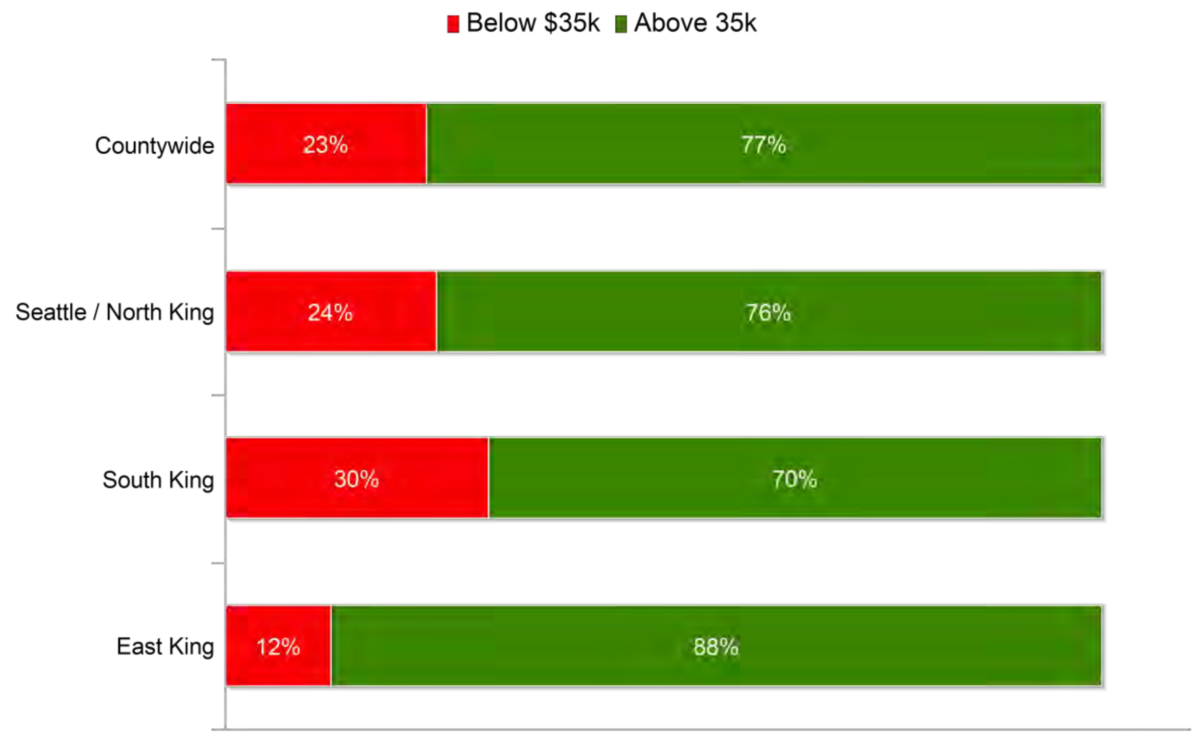
▲ / ▼ *indicates a statistically significant change from previous year*

Low-Income Riders

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

- Overall, nearly one out of four Riders are Low-Income Riders.
  - Three out of ten South King County Riders are Low-Income Riders.
  - One out of ten East King County Riders are Low-Income Riders.

Figure 5: Distribution of Low-Income Riders



Questions: D5 Is your total annual household income above or below $35,000 per year? D5AWould that be Less than $7,500, $7,500 up to $15,000, $15,000 up to $25,000, or $25,000 up to $35,000?

Base: Regular and Infrequent Riders; Year: 2015

	Countywide	Seattle / North King	South King	East King
n	1,025	472	269	284
n_w	1,025	641	190	355

▲ / ▼ indicates a statistically significant difference between respondent groups

Low-Income Riders

Low-Income Riders are:

- More likely to be female than male.
- Somewhat older due to a higher percentage 55 years of age and older and a lower percentage of those between the ages of 35 and 54.
- Less likely to be employed. A significant percentage are students or retired.
- More likely to live in a single-personal household.
- More likely to be non-Caucasian.
- Significantly less likely to have a driver's license and/or access to a vehicle.

Table 6: Demographics: Low-Income Riders

	<=$35K (n=210; n_w=721)	**>$35K** (n=203; n_w=744)
GENDER		
MALE	42%▼	53%▲
FEMALE	58%▲	47%▼
AGE		
16–17	4%	2%
18–34	31%	30%
35–54	25%▼	36%▲
55+	39%▲	31%▼
MEAN AGE	45.4	44.4
EMPLOYMENT STATUS		
EMPLOYED	37%▼	78%▲
STUDENT	17%▲	7%▼
RETIRED	27%▲	11%▼
UNEMPLOYED	8%▲	2%▼
OTHER	10%▲	2%▼
MEDIAN HH INCOME	$18,182	$90,376
HH COMPOSITION		
% SINGLE-PERSON	48%▲	25%▼
MEAN HH SIZE	2.27	2.47
RACE/ETHNICITY		
CAUCASIAN ALONE	65%▼	72%▲
ASIAN ALONE	10%	14%
BLACK ALONE	10%▲	3%▼
HISPANIC	8%	5%
MIXED RACE / OTHER	7%	5%
VEHICLE ACCESS		
% W/ LICENSE	56%▼	90%▲
% W/ VEHICLES	55%▼	92%▲
MEAN # VEHICLES (ALL)	0.80▼	1.79▲

Base: Regular and Infrequent Riders; Year: 2015
▲ / ▼ Indicates a statistically significant difference between respondent groups
Columns may to more or less than 100% due to rounding

FINDINGS: RIDERS' GENERAL TRAVEL BEHAVIOR

Summary

Topic	What We Found	What It Means
Frequency of Travel	On average, Riders take about 16 one-way trips per month. Two out of five Riders (40%) are Frequent Regular Riders—taking 11 or more trips per month and averaging 33 trips per month—roughly one trip daily. 2015 saw a significant increase in the percentage of Moderate Regular Riders (currently 25% of all Riders) and a decrease in the percentage of Infrequent Riders (currently 35% of all Riders).	The continued decrease in the average number of trips taken by Regular Riders may be due to a number of factors—a decrease in overall travel or the use of other modes such as light rail as well as the growing segment of Moderate Regular Riders. Frequent Regular Riders continue to be Metro's core market and represent 40 percent of all riders. This segment accounts for nearly 85 percent of all Metro trips.

2013	2014	2015
All Riders		
16.7	15.5	16.2
All Regular Riders		
26.1	24.5	23.7
Frequent Regular Riders		
33.4	32.4	33.4
Moderate Regular Riders		
7.1	7.4	7.5
Infrequent Riders		
2.3	2.3	2.1

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

Topic	What We Found	What It Means
Primary Trip Purpose	While over time the majority of Riders have primarily used Metro to commute to work or school, a significant percentage use Metro for non-commute travel. Commuting as Riders' primary use of Metro peaked in 2013 and has decreased each year since then, returning to 2010 levels. Those using Metro for commute trips take more than three times as many trips per month as those using Metro for non-commute trips—23.7 compared to 7.6, respectively.	Riders using Metro for commute trips are clearly Metro's core market. Those who primarily use Metro for commute trips account for nearly 77 percent of all trips. At the same time, those using Metro for non-commute trips represent an important source of incremental ridership. The continuing increase in those primarily using Metro for non-commute trips in Seattle / North King County may reflect changes in service that better meet the needs of this market.

	2013	2014	2015
All Riders			
Commute	60%▲	56%▼	53%
Non-Commute	40%▼	44%▲	47%
All Regular Riders			
% Commute	76%	72%▼	66%▼
Frequent Regular Riders			
% Commute	87%	83%▼	80%
Moderate Regular Riders			
% Commute	53%	45%▼	44%

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

Topic	What We Found	What It Means
Length of Time Riding	While the majority of Riders are Experienced Riders (riding Metro more than one year), 13 percent are New Riders (that is, started riding in the past year). The percentage of New Frequent Regular Riders has been stable over the past several years. Reflecting the significant increase in the percentage of Moderate Regular Riders, there was a significant increase in New Riders in this segment in 2015.	Metro has been consistently successful in attracting New Riders and efforts should continue. At the same time, the small but significant decrease in market share and flat ridership growth suggests that Metro may be losing Experienced Riders. This could be natural attrition as Riders age and lifestyles change. Focus should be on retaining these Riders through these changes.

2013	2014	2015
% New Riders		
12%	15%	13%
Frequent Regular Riders		
17%	17%	16%
Moderate Regular Riders		
14%	10%	15%▲
Infrequent Riders		
6%	13%▲	9%

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

Topic	What We Found	What It Means
New Rider Demos	New Riders are significantly younger than Experienced Riders—more than half are millennials (under the age of 35). In addition, they are more likely to be males. The majority of New Riders are employed; however, a significant number are students. New Riders are somewhat less likely to have a driver's license and/or access to a vehicle.	Retaining these new younger Riders, notably as they transition from being students to employees, is key to long-term growth. Millennials have significantly different lifestyles, values, and motivations as well as different ways of communicating. Use of social media, mobile devices, and other technologies will be important to reach these Riders.

	New Riders	Experienced Riders
Male	60%▲	49%▼
Female	40%▼	51%▲
16–34	55%▲	31%▼
35–54	30%	33%
55+	17%▼	36%▲
Mean	35.8▼	46.0▲
Employed	61%▼	68%▲
Student	21%▲	8%▼
Not Employed	18%▼	24%▲
% with License	75%	82%
% with Vehicle	80%	85%

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

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Reliance on Metro</td>
<td>Over the years, approximately one out of three Riders have reported that they rely on Metro for all or most of their transportation needs. Less than 10 percent rely on Metro for all of their transportation.

Those who rely on Metro for all or most of their transportation needs are frequent Riders—averaging nearly one trip per day. The number of trips taken by Metro's most reliant Riders has decreased, due to lower trip-taking among Riders who rely on Metro for all of their transportation needs.</td>
<td>
<table>
<tr><th></th><th>2013</th><th>2014</th><th>2015</th></tr>
<tr><td colspan="4">All Riders</td></tr>
<tr><td>% of Metro Reliant Riders</td><td>36%</td><td>31%▼</td><td>34%</td></tr>
<tr><td colspan="4"># of One-Way Trips</td></tr>
<tr><td></td><td>2013</td><td>2014</td><td>2015</td></tr>
<tr><td>All Transit Reliant Riders</td><td>29.2</td><td>28.6</td><td>27.2</td></tr>
<tr><td>All</td><td>35.4</td><td>32.2</td><td>29.6</td></tr>
<tr><td>Most</td><td>27.7</td><td>27.1</td><td>26.5</td></tr>
<tr><td colspan="4">Significant increase (▲) or (▼) from previous year</td></tr>
</table>
</td>
<td>A significant segment of Metro Riders relies on Metro for transportation. Additional analysis of the demographics of these Riders suggests that they are not a single segment but are differentiated by several factors such as income.</td>
</tr>
<tr>
<td>Metro Reliant Riders Demo-graphics</td>
<td>Riders who rely on Metro for all or most of their travel are clearly differentiated by their income.

A significant percentage do not have a driver's license and/or access to a vehicle.</td>
<td>
<table>
<tr><th></th><th>Metro Reliant* Riders</th></tr>
<tr><td><$35K</td><td>42%</td></tr>
<tr><td>Median</td><td>$55,471</td></tr>
<tr><td>% without Driver's License</td><td>38%</td></tr>
<tr><td>% without Access to Vehicle</td><td>36%</td></tr>
<tr><td colspan="2">* Rely on Metro for all or most of their travel</td></tr>
</table>
</td>
<td>The majority of Metro's Transit-Reliant Riders are choice riders—that is, they use Metro for a significant amount of their travel but have access to a vehicle or other transportation options.

New transit research is looking into further understanding these "choice riders"—that is, Riders who have chosen to give up vehicles and rely primarily on public transportation.</td>
</tr>
</table>

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Transfer Rates</td>
<td>The percentage of Riders reporting that they transfer increased significantly in 2015. However, transfer rates remain significantly lower than rates between 2011 and 2013.
South King County Riders are the most likely to transfer. Moreover, the increase in Riders reporting they have to transfer was highest in this area.</td>
<td><table>
<tr><th>2013</th><th>2014</th><th>2015</th></tr>
<tr><td colspan="3">% of Riders Who Transfer (Primary Trip)</td></tr>
<tr><td>52%</td><td>38%▼</td><td>45%▲</td></tr>
<tr><td colspan="3">Seattle / North King County</td></tr>
<tr><td>45%</td><td>33%▼</td><td>42%▲</td></tr>
<tr><td colspan="3">South King County</td></tr>
<tr><td>68%</td><td>49%▼</td><td>62%▲</td></tr>
<tr><td colspan="3">East King County</td></tr>
<tr><td>45%</td><td>38%</td><td>39%</td></tr>
<tr><td colspan="3">Significant increase (▲) or (▼) from previous year</td></tr>
</table></td>
<td>Access to service and travel times are important determinants of mode choice. In those instances where transfers are required, scheduling connections to minimize wait times and reduce overall travel time will reduce the impact of transferring.</td>
</tr>
<tr>
<td>Access to Service</td>
<td>More than three out of four Riders walk to the bus stop they use most often. As would be expected, Seattle / North King County Riders are the most likely to walk.</td>
<td><table>
<tr><th></th><th>% Walk</th></tr>
<tr><td>All Riders</td><td>77%</td></tr>
<tr><td>Seattle / N. King County</td><td>90%</td></tr>
<tr><td>South King</td><td>63%</td></tr>
<tr><td>East King</td><td>45%</td></tr>
<tr><td></td><td>% Drive*</td></tr>
<tr><td>All Riders</td><td>20%</td></tr>
<tr><td>Seattle / N. King County</td><td>7%</td></tr>
<tr><td>South King</td><td>32%</td></tr>
<tr><td>East King</td><td>51%</td></tr>
<tr><td colspan="2">% Drive includes drive and park, get dropped off, ride with someone else</td></tr>
</table></td>
<td>Access to service near home is an important determinant of ridership, notably among Choice Riders and less Frequent Riders. Riders may be willing to trade-off access to service near their homes with having to transfer if scheduling of transfers does not significantly increase overall travel times.</td>
</tr>
</table>

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Park-and-Ride Lot Use</td>
<td>Overall park-and-ride lot use has remained relatively stable for the past several years.
Use of park-and-ride lots continues to be highest in East King County. After decreasing steadily between 2010 and 2014, park-and-ride lot use among East King County Riders increased and returned to the peak last seen in 2010.</td>
<td>
<table>
<tr><th>2013</th><th>2014</th><th>2015</th></tr>
<tr><td colspan="3">% of Riders Using Park-and-Ride Lots in Past Year</td></tr>
<tr><td>35%</td><td>33%</td><td>35%</td></tr>
<tr><td colspan="3">Seattle / North King County</td></tr>
<tr><td>19%</td><td>15%▼</td><td>19%▲</td></tr>
<tr><td colspan="3">South King County</td></tr>
<tr><td>43%</td><td>46%</td><td>47%▼</td></tr>
<tr><td colspan="3">East King County</td></tr>
<tr><td>66%</td><td>62%</td><td>77%▲</td></tr>
<tr><td colspan="3">Significant increase (▲) or (▼) from previous year</td></tr>
</table>
</td>
<td>Metro's park-and-ride lot system continues to provide an important means for accessing service.</td>
</tr>
</table>

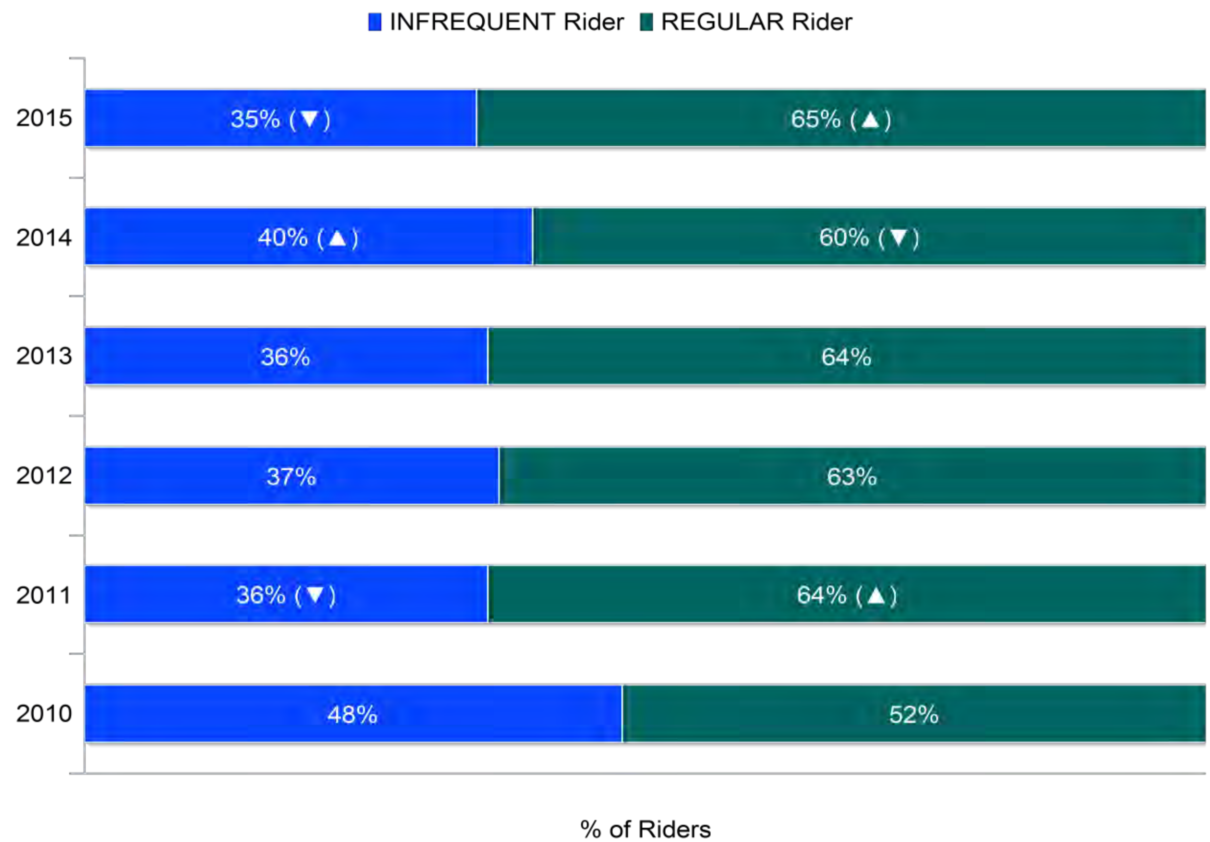
Frequency of Riding

Nearly two out of three Riders are Regular Riders—a significant increase from 2014.

Moreover, there was a significant increase in the percentage of Moderate Regular Riders. While there was some decrease in share of Rider households, notably Infrequent Rider households, these shifts suggest that while some Infrequent Riders may have stopped riding (or have not ridden recently), others have increased the frequency with which they ride, moving them to the Moderate Regular Rider segment.

Regular Riders	2014	2015
	Countywide	
Frequent	69%	62%▼
Moderate	31%	38%▲

Figure 6: Percentage of Riders who are Regular and Infrequent Riders



Questions: S5A/S6A Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus?
Note years prior to 2015 included rides on South Lake Union Streetcar.

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014	2015
n	1,140	1,455	1,218	1,395	1,102	1,025
n_w	1,140	1,455	1,218	1,395	1,161	1,025

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

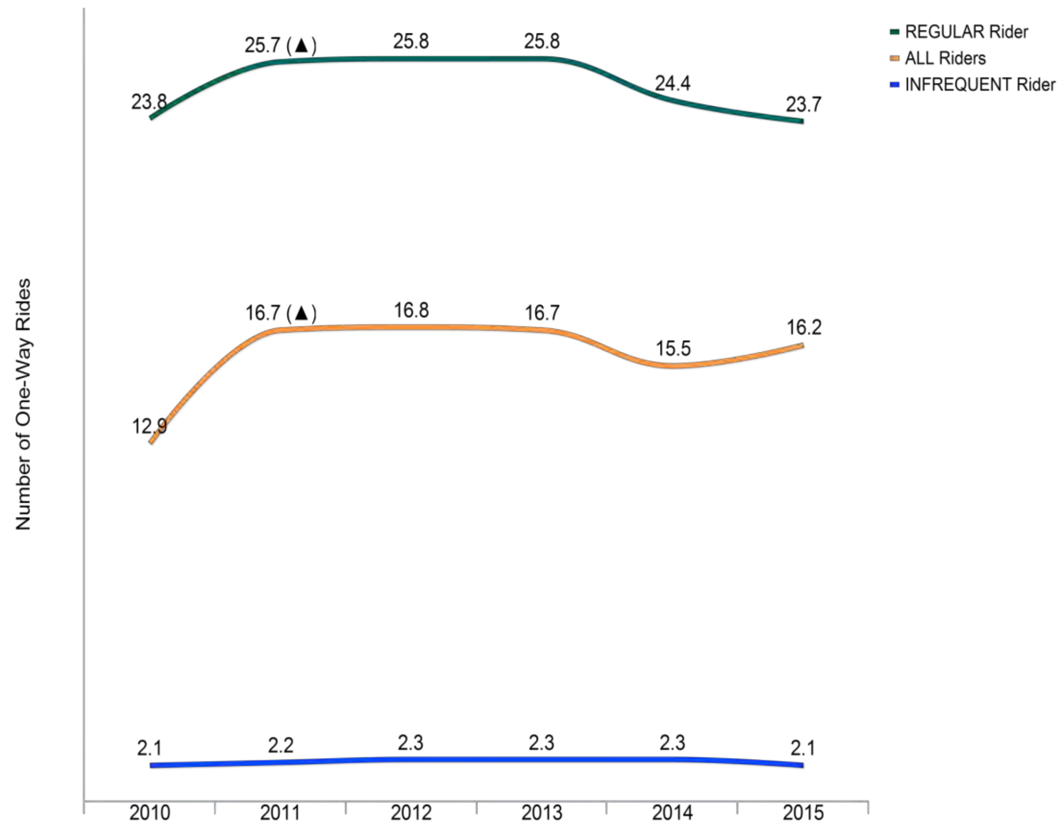
After increasing between 2010 and 2011, the average number of trips taken by all Riders has remained relatively stable at about 16.

- The slight) increase in 2015 is due to a greater percentage of Regular versus Infrequent Riders in 2015 compared to 2014 (Figure 6).

Over the years, the average number of one-way trips taken by Regular Riders has ranged between 23 and 26 per month.

- Riding frequency among Regular Riders increased between 2010 and 2011 but has been decreasing since 2013.
- The average for Infrequent Riders over the years has been just over two.

Figure 7: All Riders: Trends in Riding Frequency (Average Number of One-Way Rides in Past 30 Days)



Questions: S5A/S6A Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus?
Note years prior to 2015 included rides on South Lake Union Streetcar.

Note: Years prior to 2015 included rides on South Lake Union Streetcar; to minimize the effect of outliers (from combining bus and streetcar rides) on the mean, the number of one-way rides is capped at 90.

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014	2015
n	1,140	1,455	1,218	1,395	1,102	1,025
n_w	1,140	1,455	1,218	1,395	1,161	1,025

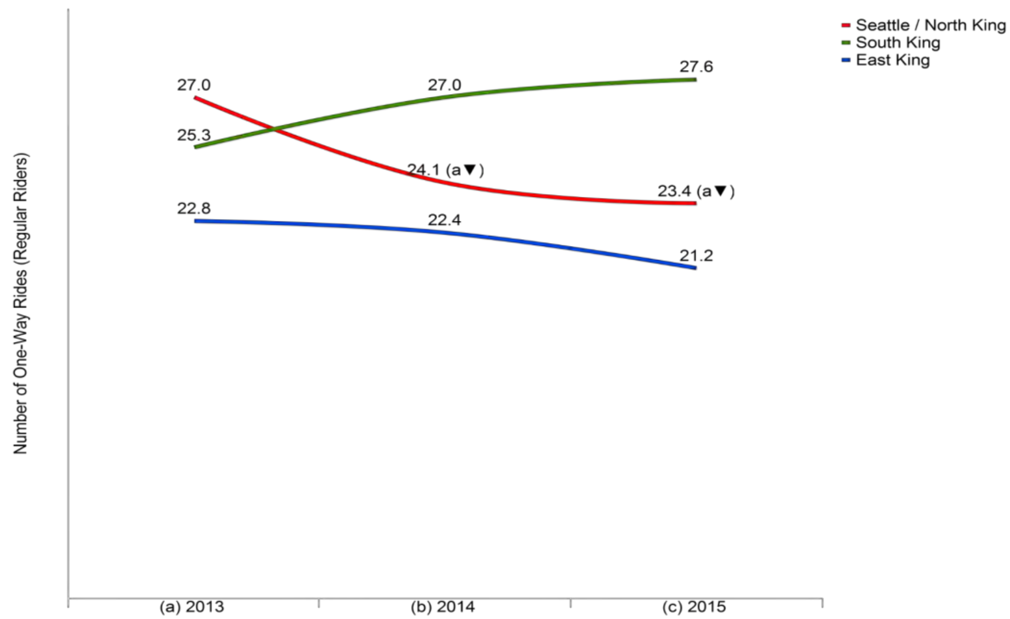
▲ / ▼ *indicates a statistically significant change from previous year*

Regular Riders' Frequency of Riding by Area of Residence

The decrease in the number of trips taken by Regular Riders is primarily due to the significant decrease in the number of trips taken by Regular Riders living in Seattle / North King County. Seattle / North King County Riders have considerable access to other transportation modes (e.g., light rail, car sharing, Car2Go). Many may also live in close proximity to urban villages with access to services and shopping within walking distance. This decrease may also reflect the fact that rides on the South Lake Union Streetcar were not included in the 2015 study.

This decrease has been offset to some degree by the year over year increase in the average number of trips taken by Regular Riders living in South King County.

Figure 8: Regular Riders' Frequency of Riding by Area of Residence



Questions: S5A/S6A Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus?
Note: Years prior to 2015 included rides on South Lake Union Streetcar; to minimize the effect of outliers (from combining bus and streetcar rides) on the mean, the number of one-way rides is capped at 90.

Base: Regular Riders

	Seattle / N. King County			South King County			East King County		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
n	402	417	406	403	222	252	402	222	264
n_{rw}	481	396	451	258	186	115	149	143	103

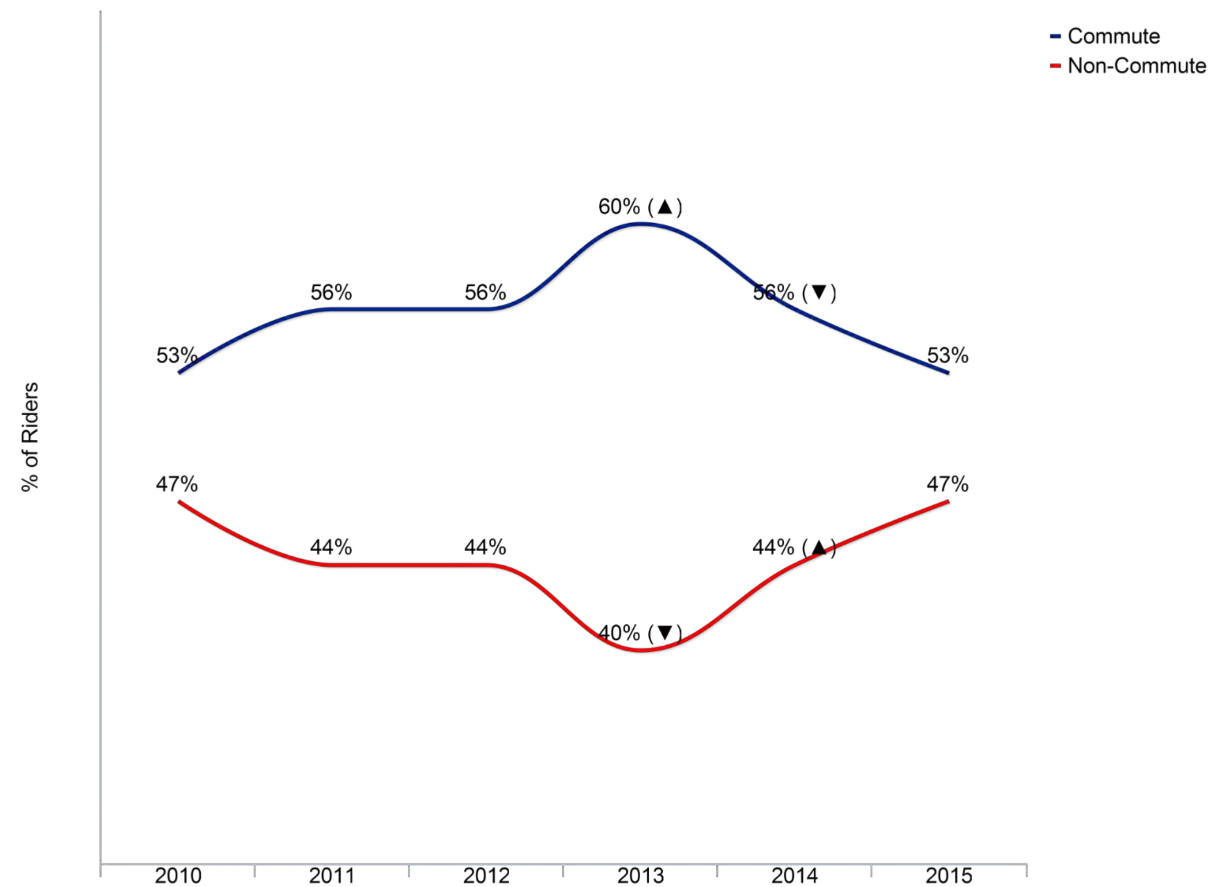
▲ / ▼ *indicates a statistically significant change from previous year*

Primary Trip Purpose

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

- Commuting as Riders' primary use of Metro peaked in 2013 and has decreased each year since then, returning to 2010 levels.

Figure 9: Trends in Primary Trip Purpose



Question: M5A When you ride Metro, what is the primary purpose of the trip you take most often?

Base: Regular and Infrequent Riders

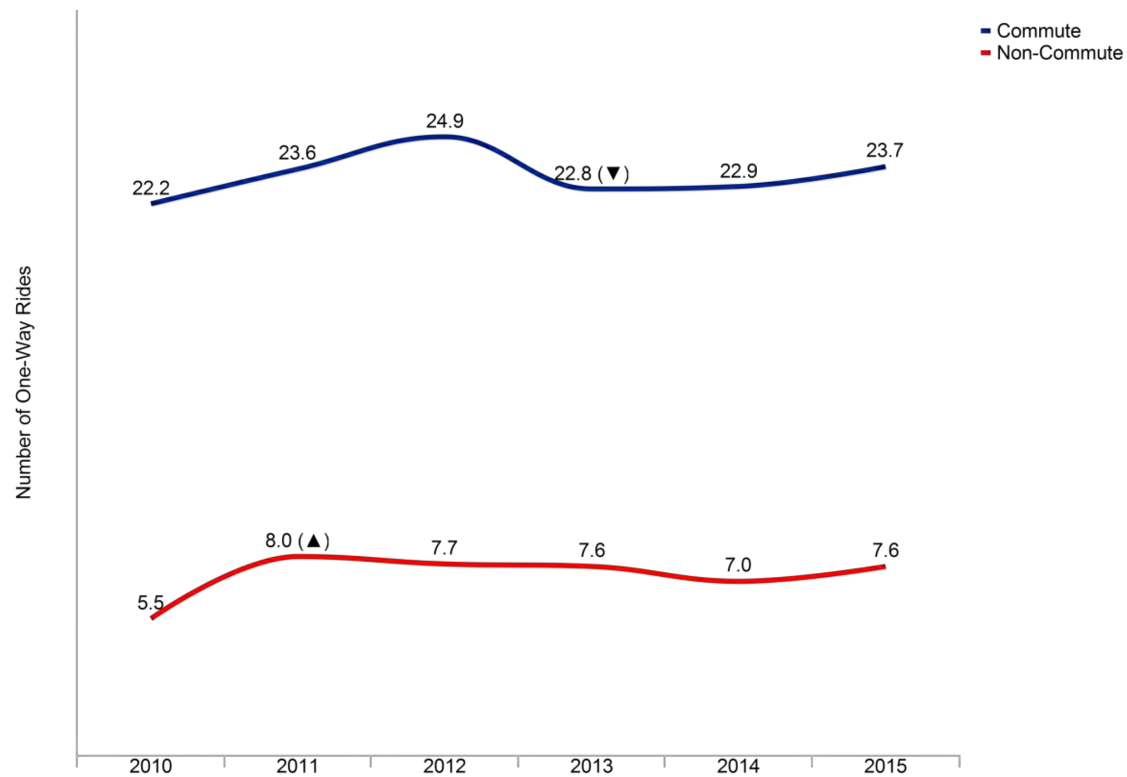
	2010	2011	2012	2013	2014	2015
n	*1,140*	*1,455*	*1,218*	*1,395*	*1,102*	*1,025*
n_w	*1,140*	*1,455*	*1,218*	*1,395*	*1,161*	*1,025*

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

Riders who primarily use Metro for commute trips take more than three times as many one-way trips per month than do those primarily using Metro for non-commute trips.

Therefore, while only 53 percent of all Riders primarily use Metro for commute trips, they account for nearly 77 percent of all monthly trips.

Figure 10: Number of One-Way Rides by Primary Trip Purpose



Questions: S5A/S6A Thinking about the last 30 days, how many one-way rides have you taken on a Metro bus? Years prior to 2015 included rides on South Lake Union Streetcar; to minimize the effect of outliers (from combining bus and streetcar rides) on the mean, the number of one-way rides is capped at 90.

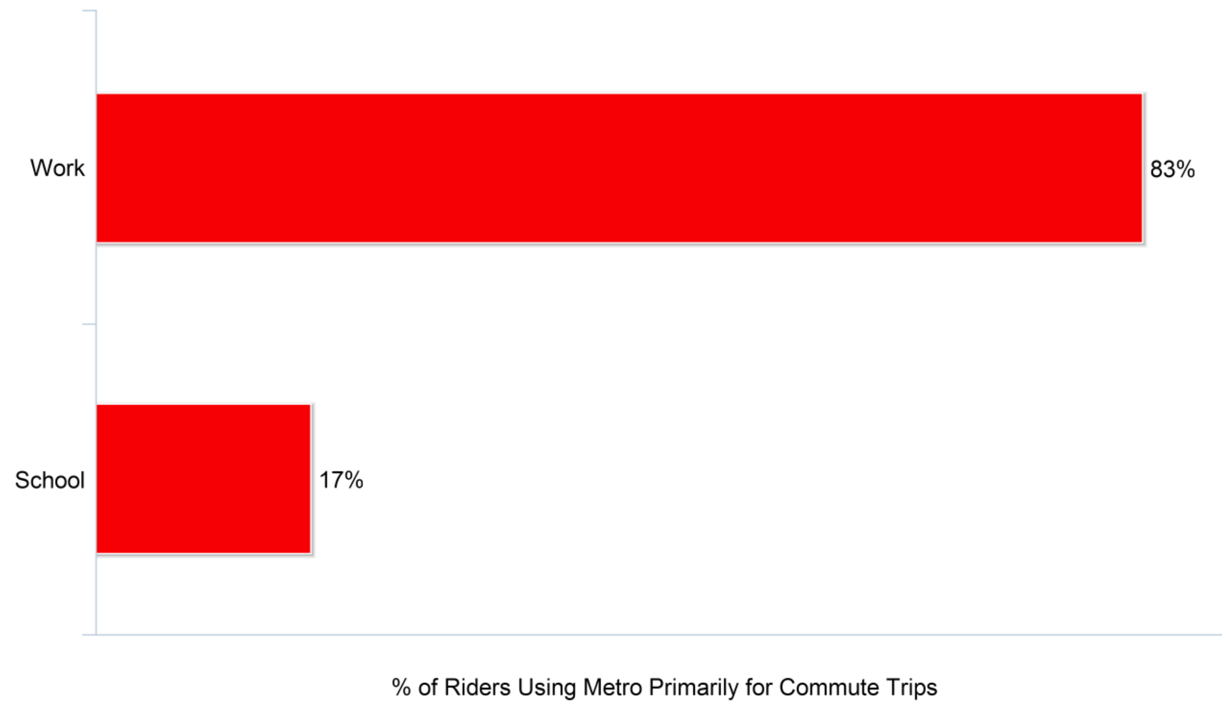
Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014	2015
n	*1,140*	*1,455*	*1,218*	*1,395*	*1,102*	*1,025*
n_w	*1,140*	*1,455*	*1,218*	*1,395*	*1,161*	*1,025*

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

More than four out of five Metro Riders who primarily use Metro for commute trips are commuting to work. The remainder of commuters are going to school.

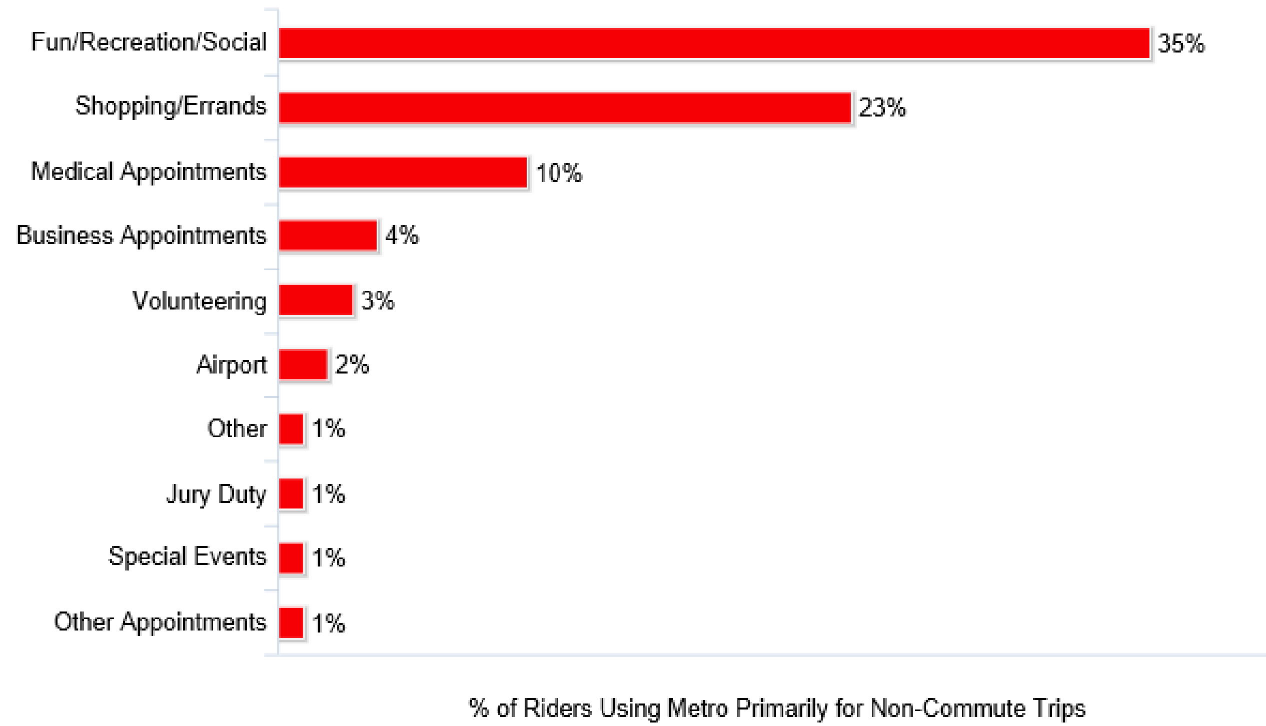
Figure 11: Primary Trip Purpose for Those Who Primarily Use Metro for Commute Trips



	n	n_{rw}
Base: Regular and Infrequent Riders Who Primarily Use Metro for Commute Trips' Year: 2015	*651*	*541*

Riders who primarily use Metro for non-commute trips use Metro for a variety of purposes. The most common are recreation and shopping.

Figure 12: Primary Trip Purpose for Those Who Primarily Use Metro for Non-Commute Trips



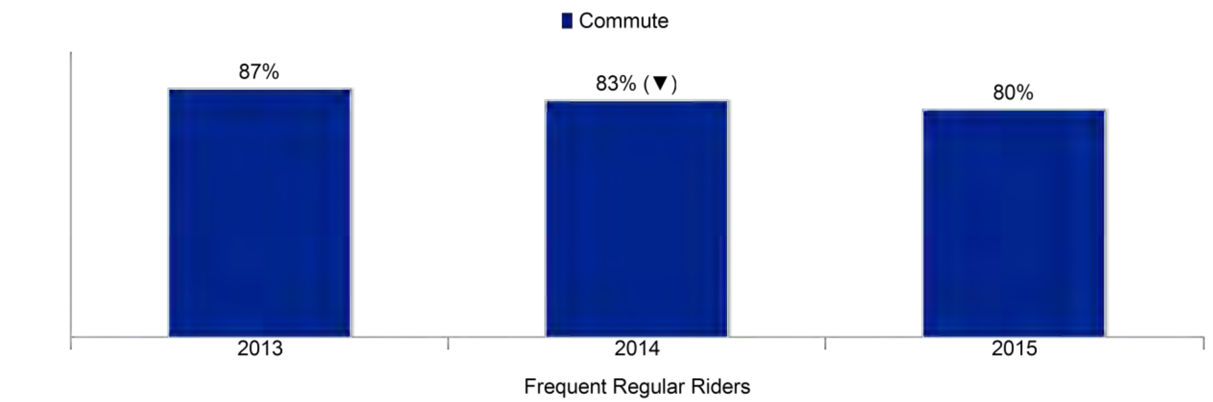
	n	n_{rw}
Base: Regular and Infrequent Riders Who Primarily Use Metro for Non-Commute Trips; Year: 2015	*372*	*483*

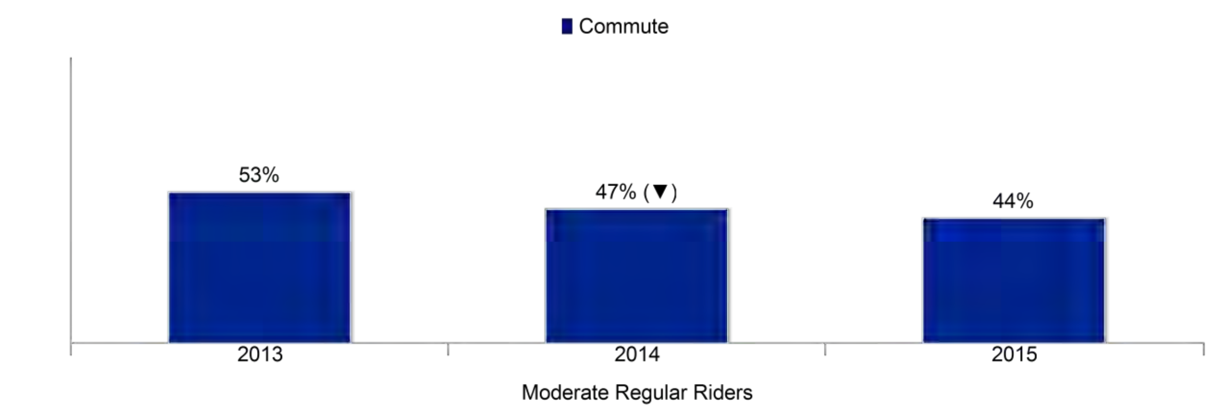
Regular Riders' Primary Use of Metro for Commute Trips by Frequency of Riding

Frequent Regular Riders are nearly twice as likely as Moderate Regular Riders to primarily use Metro to commute to work or school.

- While the primary use of Metro to commute to work or school has decreased for both Frequent and Moderate Regular Riders, the decrease is greater among Moderate Regular Riders.

Figure 13: Regular Riders' Primary Use of Metro for Commute Trips by Frequency of Riding





Base: Regular Riders

	Frequent Regular Riders			*Moderate Regular Riders*		
	2013	*2014*	*2015*	*2013*	*2014*	*2015*
n	*776*	*591*	*585*	*420*	*266*	*337*
n_w	*573*	*496*	*413*	*304*	*225*	*257*

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

Demographic Characteristics

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

Commute Trips

Those primarily using Metro for commute trips are:

- More likely to be men.
- Generally, between the ages of 18 and 54; nearly half are between 35 and 54.
- More affluent.
- More diverse.

Non-Commute

Those primarily using Metro for non-commute trips are:

- More likely to be women.
- Older; nearly half are 55 years of age and older.
- Less affluent; more than one out of four have household incomes below $35,000.
- More likely to live in a single-person household.
- Somewhat less likely to have access to a vehicle.

Table 7: Demographics: Primary Trip Purpose

	COMMUTE (n=651; n_w=541)	NON-COMMUTE (n=372; n_w=483)
GENDER		
MALE	55%▲	45%▼
FEMALE	45%▼	55%▲
AGE		
16 –17	4%	3%
18 –34	36%▼	24%▼
35 –54	40%▲	24%▼
55+	20%▼	49%▲
MEAN	39.7▼	50.2▲
EMPLOYMENT STATUS		
EMPLOYED	82%▲	50%▼
STUDENT	13%▲	5%▼
RETIRED	1%▼	32%▲
OTHER	4%▼	12%▲
INCOME		
<$35K	19%▼	27%▲
$35K–<$55K	16%	14%
$55K–<$75K	13%	14%
$75K–<$100K	18%	16%
$100K+	33%	28%
MEDIAN	$71,916▲	$61,460▼
HH COMPOSITION		
% SINGLE-PERSON	23%▼	39%▲
AVERAGE HH SIZE	2.72	2.19
RACE/ETHNICITY		
CAUCASIAN ALONE	63%▼	78%▲
ASIAN ALONE	15%	12%
BLACK ALONE	7%▲	2%▼
HISPANIC	8%▲	3%▼
MIXED RACE / OTHER	7%▲	5%▼
VEHICLE ACCESS		
% W/ LICENSE	82%	81%
% W/ VEHICLES	89%▲	80%▼
MEAN # VEHICLES	1.68	1.54

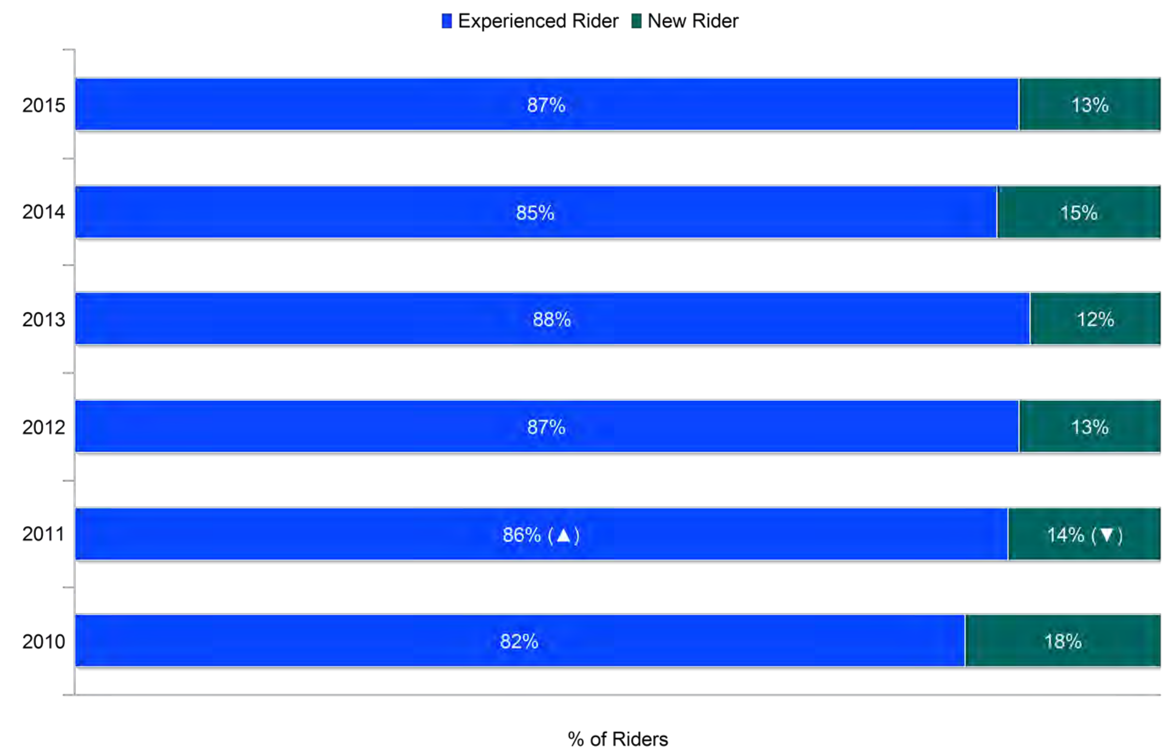
Base: Regular and Infrequent Riders; Year: 2015
▲ / ▼ indicates a statistically significant difference between respondent groups
Columns may sum to more or less than 100% due to rounding

Length of Time Riding Metro

The majority of Metro Riders have been riding more than one year.

- Since 2011, between 12 and 15 percent of Riders are new to the system (started riding in the past year).

Figure 14: Trends in Length of Time Riding Metro (New and Experienced Riders)



Questions M1 How long have you been riding Metro?
M1A Did you start riding Metro after September of 2013?
New Riders are defined as riders who started riding after September of the year preceding the survey

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014	2015
n	1,140	1,455	1,218	1,395	1,102	1,025
n_w	1,140	1,455	1,218	1,395	1,161	1,025

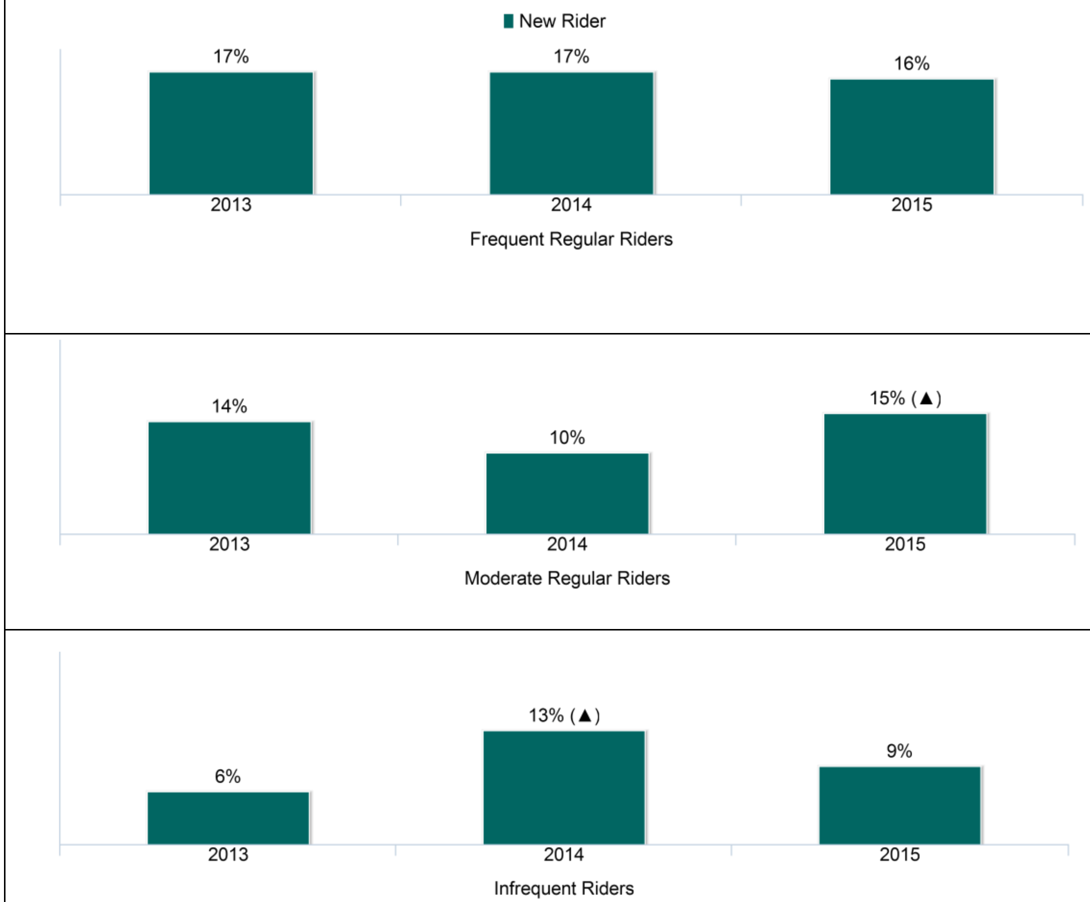
▲ / ▼ *indicates a statistically significant change from previous year*

Percentage of New Riders by Frequency of Riding

Nearly twice as many Regular Riders are New Riders compared to Infrequent Riders—16 percent compared to 9 percent, respectively.

- The percentage of Frequent Regular Riders who are New Riders has remained relatively consistent over the years.
- Consistent with the significant increase in the percentage of Moderate Regular Riders in 2015, there was a significant increase in the percentage of Moderate Regular Riders who started riding in the past year.
- Similarly, there was a decrease in the percentage of Infrequent Riders and a corresponding decrease in the percentage of Infrequent Riders who started riding in the past year.

Figure 15: Percentage of New Riders by Frequency of Riding



Base: Regular and Infrequent Riders

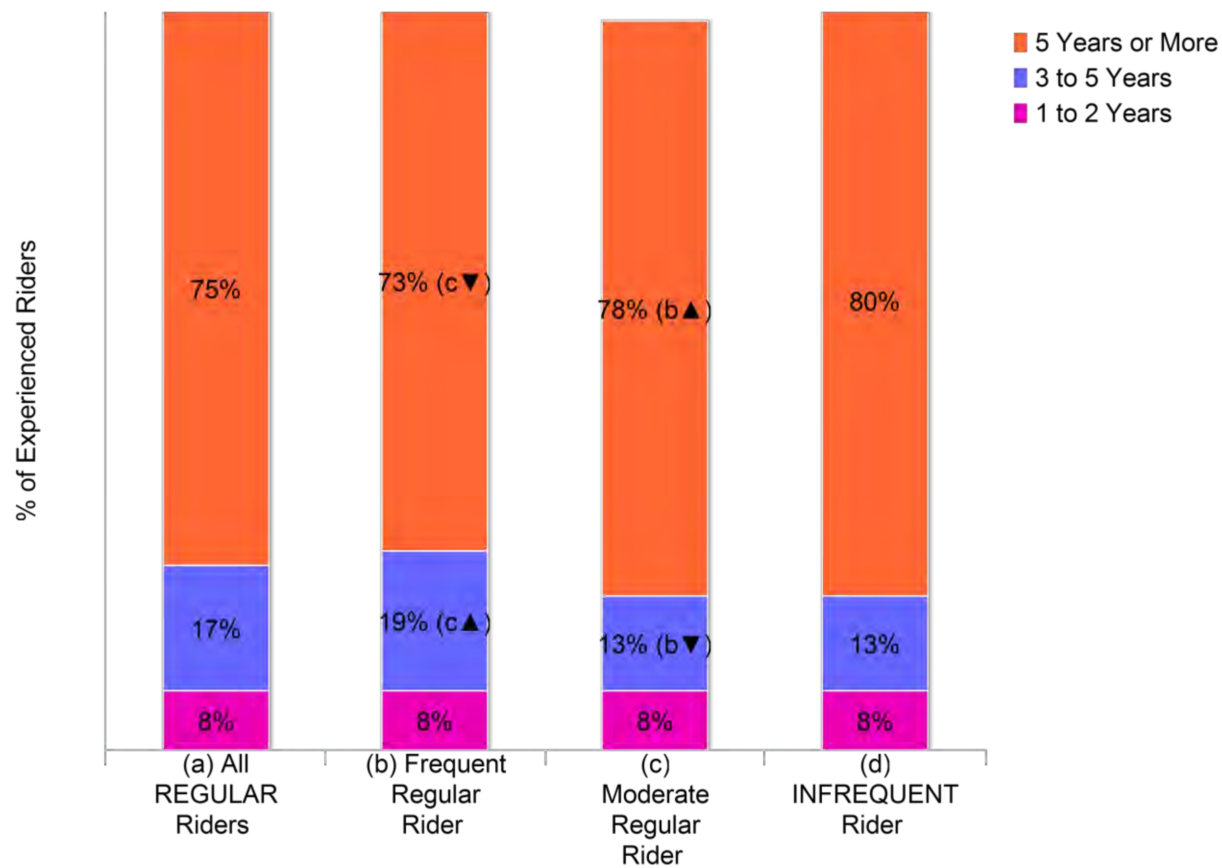
	Frequent Regular Riders			*Moderate Regular Riders*			*Infrequent Riders*		
	2013	*2014*	*2015*	*2013*	*2014*	*2015*	*2013*	*2014*	*2015*
n	*776*	*591*	*585*	*420*	*266*	*337*	*188*	*241*	*103*
n_w	*366*	*498*	*254*	*294*	*218*	*158*	*324*	*442*	*219*

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

Infrequent Riders and, to a somewhat lesser extent, Moderate Regular Riders are more likely than Frequent Regular Riders to be long-term Riders (five or more years).

Nearly one out of five Frequent Regular Riders have been riding between three and five years.

Figure 16: Experienced Riders: Length of Time Riding (2015) by Frequency of Riding



BASE: EXPERIENCED RIDERS 2015

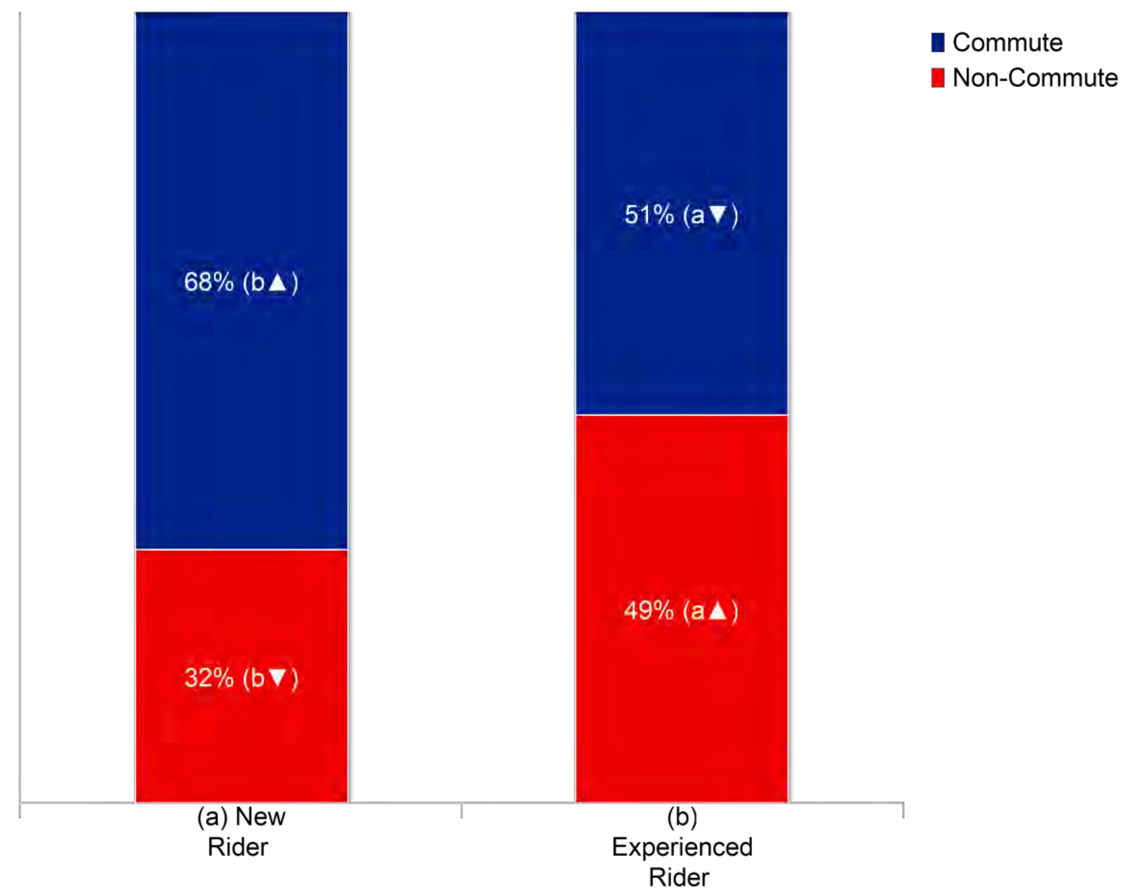
	All Regular Riders	*Frequent Regular Riders*	*Moderate Regular Riders*	*Infrequent Riders*
n	*779*	*488*	*291*	*94*
n_w	*564*	*348*	*271*	*135*

Trip Purpose: New and Experienced Riders

New Riders are significantly more likely than Experienced Riders to primarily use Metro for commute trips.

- The increase in the percentage of Riders using Metro for non-commute trips has occurred among Experienced Riders—increasing from 42 percent in 2013 to 49 percent in 2015.

Figure 17: Trip Purpose by Length of Time Riding



	n	*nw*
New Riders 2015	*150*	*135*
Experienced Riders 2015	*873*	*889*

Demographic Characteristics: New and Experienced Riders

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

New Riders

New Riders are:

- More likely to be men.
- Significantly younger than Experienced Riders. More than half are less than 35 years of age and thus part of the millennial generation.
- Generally employed. However, a significant number are students.
- More likely than Experienced Riders to be Asian.

Experienced Riders

Experienced Riders are:

- On average 10 years older than New Riders.
- Are somewhat more likely to be employed. However, a significant percentage are retired.
- Somewhat more affluent due to a higher percentage making between $75,000 and $100,000.
- Predominantly Caucasian.

Table 8: Demographics: New and Experienced Riders

	NEW RIDERS (n=150; n_w=135)	EXPERIENCED RIDERS (n=873; n_w=889)
GENDER		
MALE	60%▲	49%▼
FEMALE	40%▼	51%▲
AGE		
16 –34	55%▲	31%▼
35 –54	30%	33%
55+	17%▼	36%▲
MEAN	35.8▼	46.0▲
EMPLOYMENT STATUS		
EMPLOYED	61%	68%
STUDENT	21%▲	8%▼
RETIRED	5%▼	17%▲
OTHER	13%▲	7%▼
INCOME		
<$35K	30%	22%
$35K–<$55K	17%	15%
$55K–<$75K	16%	13%
$75K–<$100K	8%▼	19%▲
$100K+	29%	31%
MEDIAN	$63,239	$68,036
HH COMPOSITION		
% SINGLE-PERSON	21%	31%
AVERAGE HH SIZE	2.83	2.41
RACE/ETHNICITY		
CAUCASIAN ALONE	54%▼	73%▲
ASIAN ALONE	28%▲	11%▼
BLACK ALONE	5%	5%
HISPANIC	7%	5%
MIXED RACE / OTHER	7%	6%
VEHICLE ACCESS		
% W/ LICENSE	75%	82%
% W/ VEHICLES	80%	85%
MEAN # VEHICLES	1.65	1.61

Base: Regular and Infrequent Riders; Year: 2015
▲ / ▼ indicates a statistically significant difference between respondent groups
Columns may sum to more or less than 100% due to rounding

Reliance on Metro for Transportation

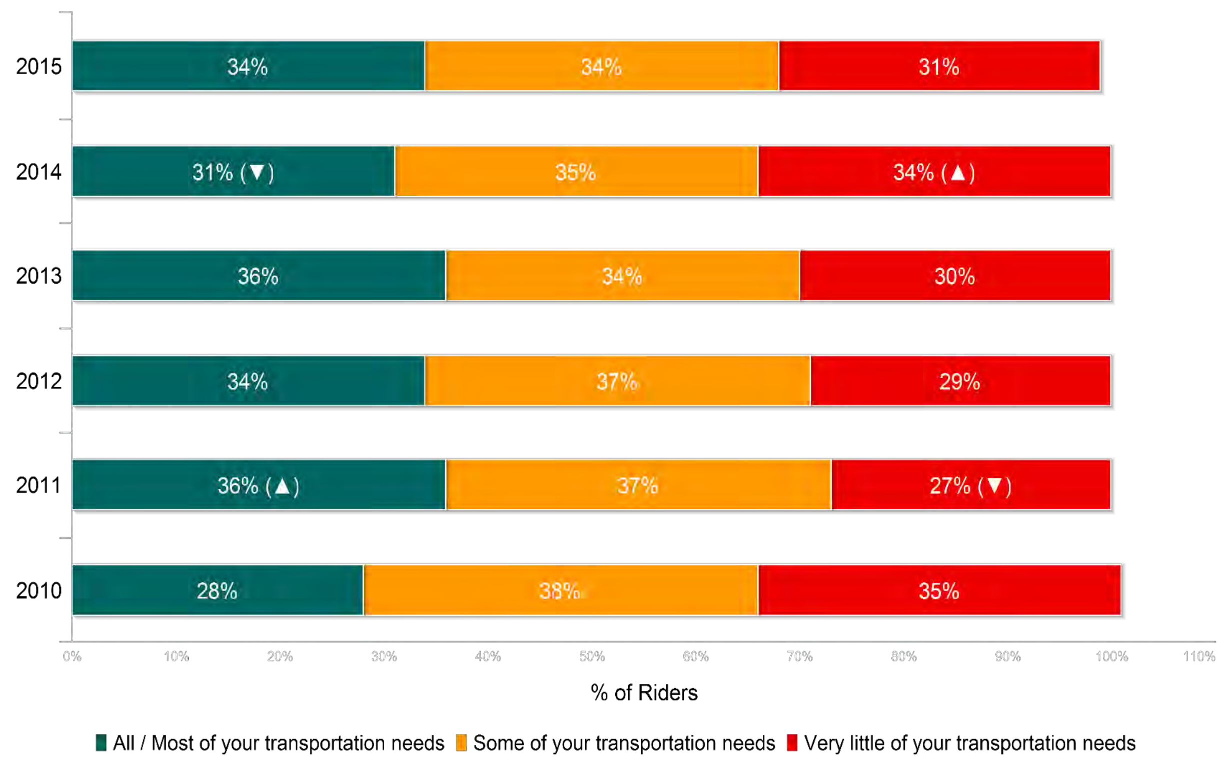
The majority of Riders rely on Metro for some or very little of their transportation needs.

However, a relatively consistent percentage (approximately one-third) relies on Metro for all or most of their transportation.

- The percentage of Riders relying on Metro for all or most of their transportation needs decreased significantly in 2014. It increased somewhat in 2015 but remains below 2013 levels.
- The percentage of Riders relying on Metro for all of their transportation needs has remained relatively stable over the years.

	2013	2014	2015
All	7%	9%	8%
Most	29%	22%	26%

Figure 18: Reliance on Metro



Question: M4 Now, thinking about all of your travel around King County, to what extent do you use Metro to get around?

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014	2015
n	1,140	1,455	1,218	1,395	1,102	1,025
n_w	1,140	1,455	1,218	1,395	1,161	1,025

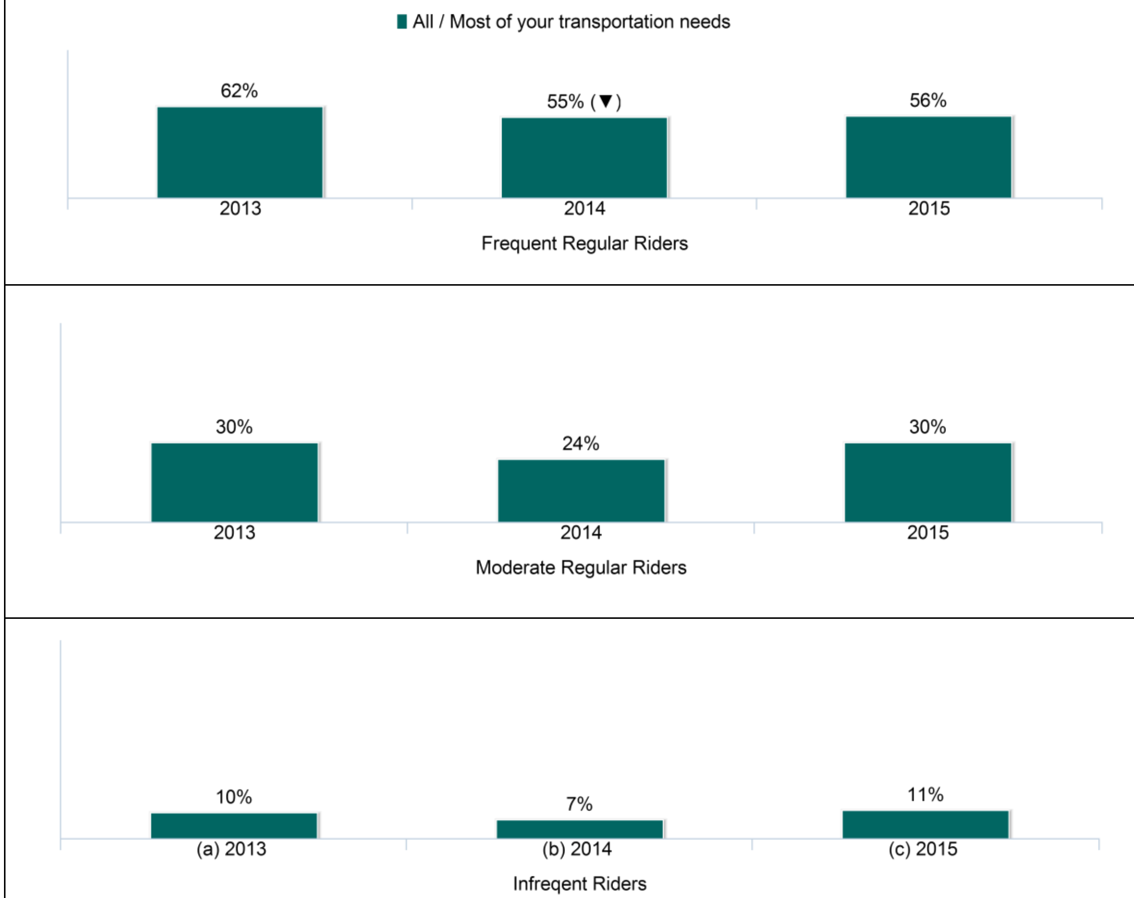
▲ / ▼ *indicates a statistically significant change from previous year*

Reliance on Metro by Frequency of Riding

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

- More than half of Frequent Regular Riders rely on Metro for all or most of their transportation needs.
    - Frequent Regular Riders are significantly less likely to have a driver's license and/or access to a vehicle.

Figure 19: Reliance on Metro by Frequency of Riding



BASE: REGULAR AND INFREQUENT RIDERS

	Frequent Regular Riders			*Moderate Regular Riders*			*Infrequent Riders*		
	2013	*2014*	*2015*	*2013*	*2014*	*2015*	*2013*	*2014*	*2015*
N	*776*	*591*	*585*	*420*	*266*	*337*	*188*	*241*	*103*
N_W	*366*	*498*	*254*	*294*	*218*	*158*	*324*	*442*	*219*

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

Demographic Characteristics

Rely on Metro for All or Most of Their Transportation Needs

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

- Younger—more than two out of five are under the age of 35.
- Less affluent—more than two out of five have annual household incomes below $35,000.
- Mostly employed. However, a significant percentage are currently not working or are students.
- More diverse; a significant percentage are black or mixed race.
- Less likely to have a drivers' license and/or access to a vehicle. One out of five (21%) Riders who rely on Metro for all or most of their transportation needs do not have a license or vehicle.

Table 9: Demographics: Reliance on Metro

	ALL / MOST (n=411; n_w=350)	SOME (n=423; n_w=353)	VERY LITTLE (n=189; n_w=321)
GENDER			
MALE	51%	55%▲	45%▼
FEMALE	49%	45%▼	55%▲
AGE			
16–34	42%▲▲	32%▼	26%▼
35–54	30%	32%	36%
55+	28%▼▼	36%▲	37%▲
MEAN	41.6▼	45.3▲	47.2▲
EMPLOYMENT STATUS			
EMPLOYED	63%	69%	69%
STUDENT	13%▲	11%▲	4%▼▼
RETIRED	13%	15%	20%▲
OTHER	11%▲	6%▼	7%
INCOME			
<$35K	42%▲▲	13%▼	12%▼
$35K–<$55K	18%	14%	15%
$55K–<$75K	10%	14%	16%
$75K–<$100K	9%▼▼	26%▲▲	18%▲▼
$100K+	21%▼▼	33%▲	39%▲
MEDIAN	$55,471	$75,043	$82,679
HH COMPOSITION			
% SINGLE-PERSON	32%▲	23%▼▼	35%▲
AVERAGE HH SIZE	2.45	2.64	2.30
RACE/ETHNICITY			
CAUCASIAN ALONE	62%▼▼	73%▲	77%▲
ASIAN ALONE	14%	14%	13%
BLACK ALONE	8%▲▲	4%▼	2%▼
HISPANIC	7%	5%	5%
MIXED RACE / OTHER	9%▲	5%▼	4%▼
VEHICLE ACCESS			
% W/ LICENSE	62%▼▼	89%▲	94%▲
% W/ VEHICLES	64%▼▼	92%▲▼	98%▲
MEAN # VEHICLES	1.12▼	1.83▲	1.90▲

Base: Regular and Infrequent Riders; Year: 2015
▲ / ▼ Indicates a statistically significant difference between respondent groups
Columns may sum to more or less than 100% due to rounding

Driver's License and Vehicle Access by Reliance on Metro

Two out of five (41%) Riders who rely on Metro for ***all*** of their transportation needs have a driver's license and/or access to a vehicle.

Seven out of ten Riders who rely on Metro for most of their transportation needs have a driver's license and/or access to a vehicle.

Figure 20: Percentage of Riders with Driver's License by Reliance on Metro

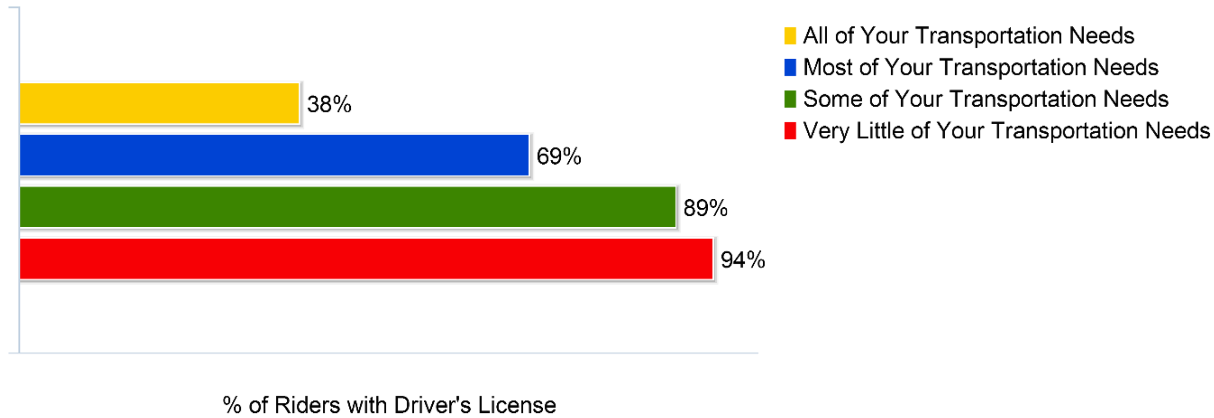
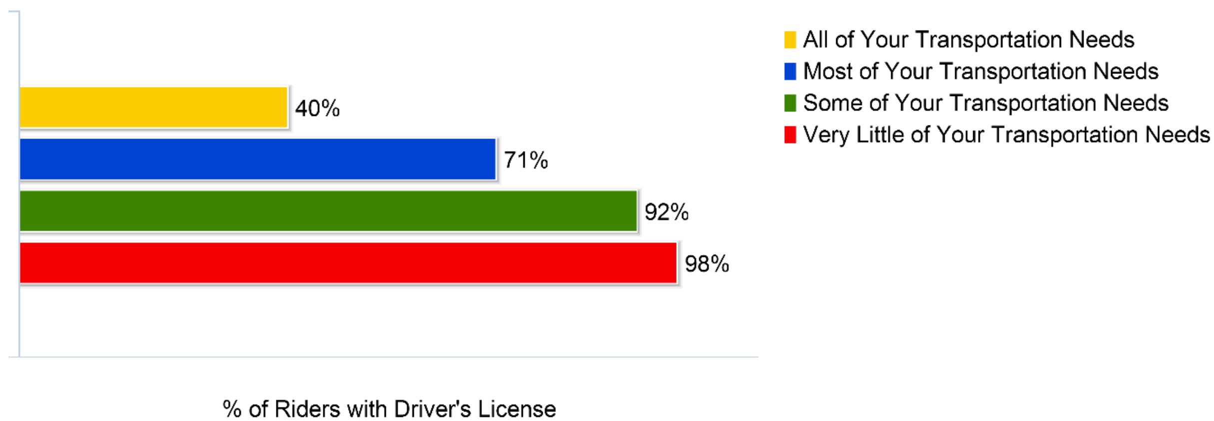


Figure 21: Percentage of Riders with Access to Vehicle by Reliance on Metro



	n	*n_w*
Base: Regular and Infrequent Riders Year: 2015	*1,025*	*1,025*

Travel Times

Peak and Off-Peak Travel

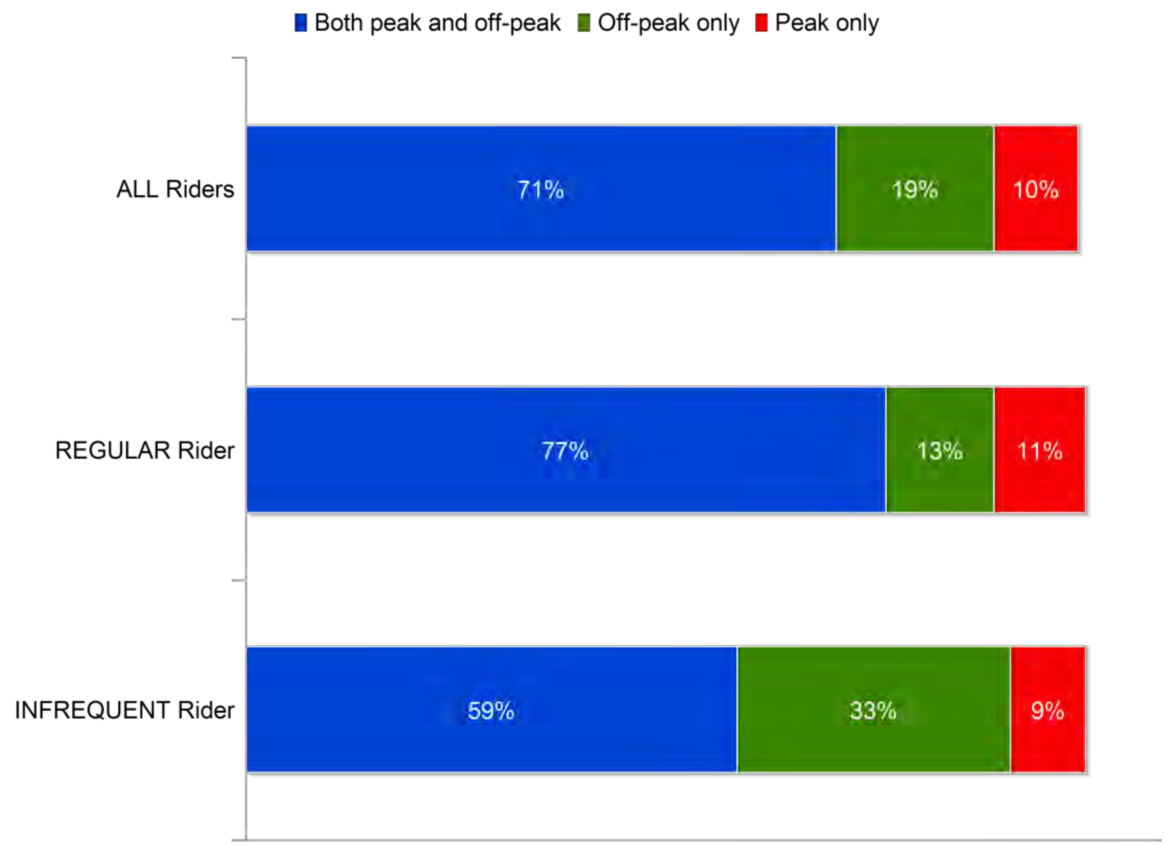
The majority of Riders use Metro during both peak and off-peak hours.

- This is noteworthy for Regular Riders.

	Frequent Regular Riders	Moderate Regular Riders
% Ride both peak and off-peak hours	80%	72%

- While the majority of Infrequent Riders also ride during both peak and off-peak hours, they are more likely than Regular Riders to limit the times they ride to off-peak hours.

Figure 22: Peak and Off-Peak Travel



*Question: M6 During which of the following time periods do you currently ride the **bus**?*

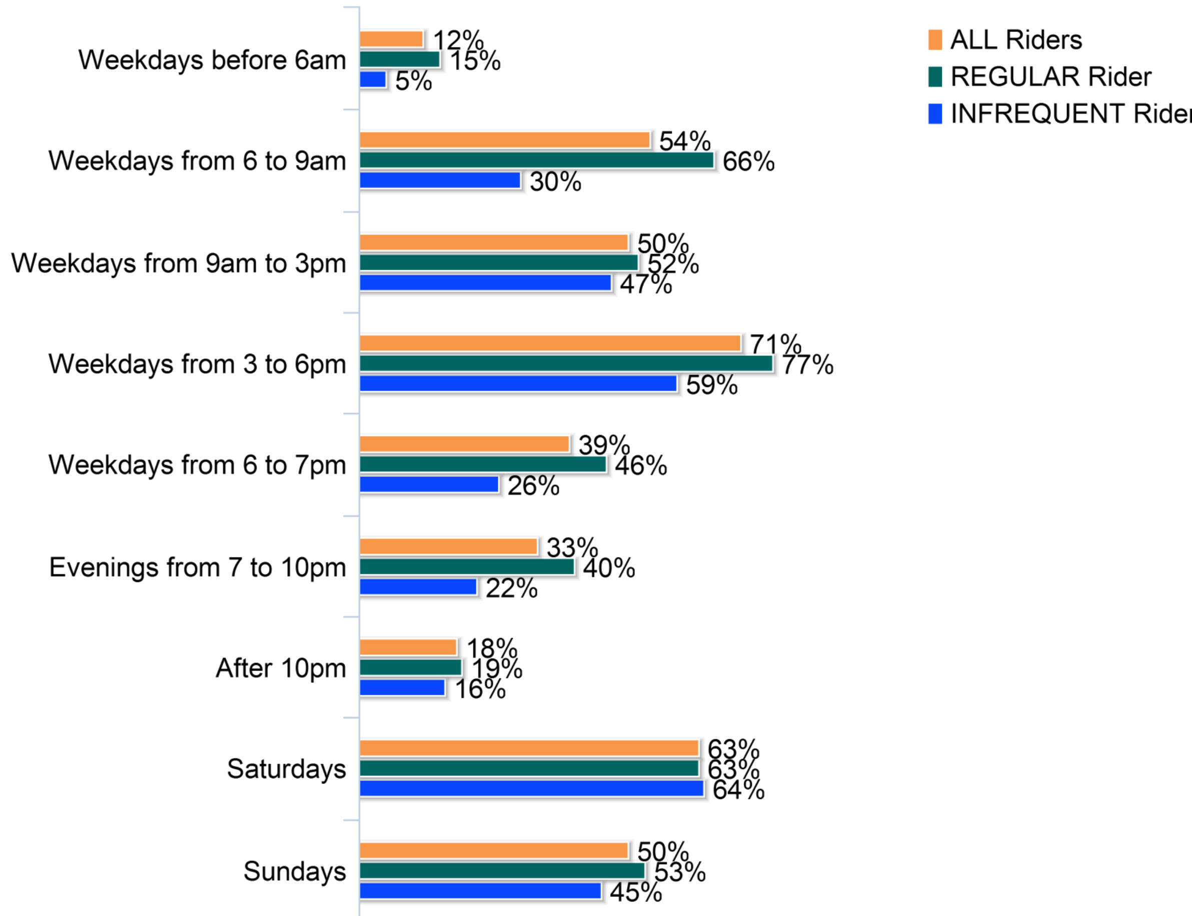
Base: Regular and Infrequent Riders 2015

	All Riders	Regular Riders	Infrequent Riders
n	1,025	922	103
n_w	1,025	669	356

Regular Riders are somewhat more likely to ride during the peak weekday afternoon hours (3:00 to 6:00 p.m.) than the peak weekday morning hours (6:00 to 9:00 a.m.).

Riders are more likely to ride on Saturdays than Sundays.

Figure 23: Detailed Times Ride



*Question: M6 During which of the following time periods do you currently ride the **bus**? Multiple responses allowed*

Base: Regular and Infrequent Riders 2015

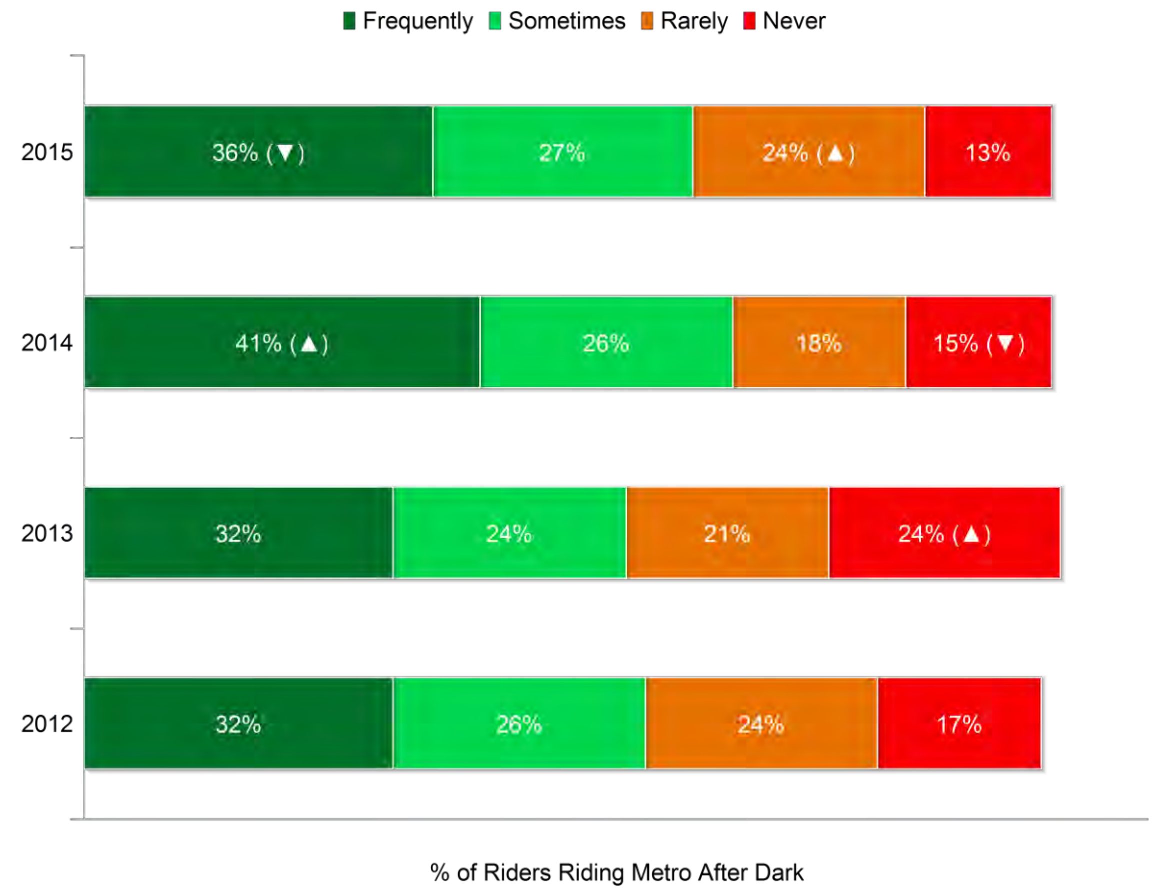
	All Riders	Regular Riders	Infrequent Riders
n	1,025	922	103
n_w	1,025	669	356

After Dark

In 2014, there was a significant increase in the percentage of Riders reporting they frequently rode Metro when it was dark. This percentage decreased in 2015 but remains higher than that reported in 2012 and 2013.

- The percentage of Riders reporting that they never ride when it is dark has been decreasing since 2013.

Figure 24: Extent to Which Riders Use Metro When It Is Dark



Question: PS1A In the past year, how often have you ridden the bus or streetcar when it is dark?
Columns may sum to more or less than 100% due to rounding

Base: Regular and Infrequent Riders

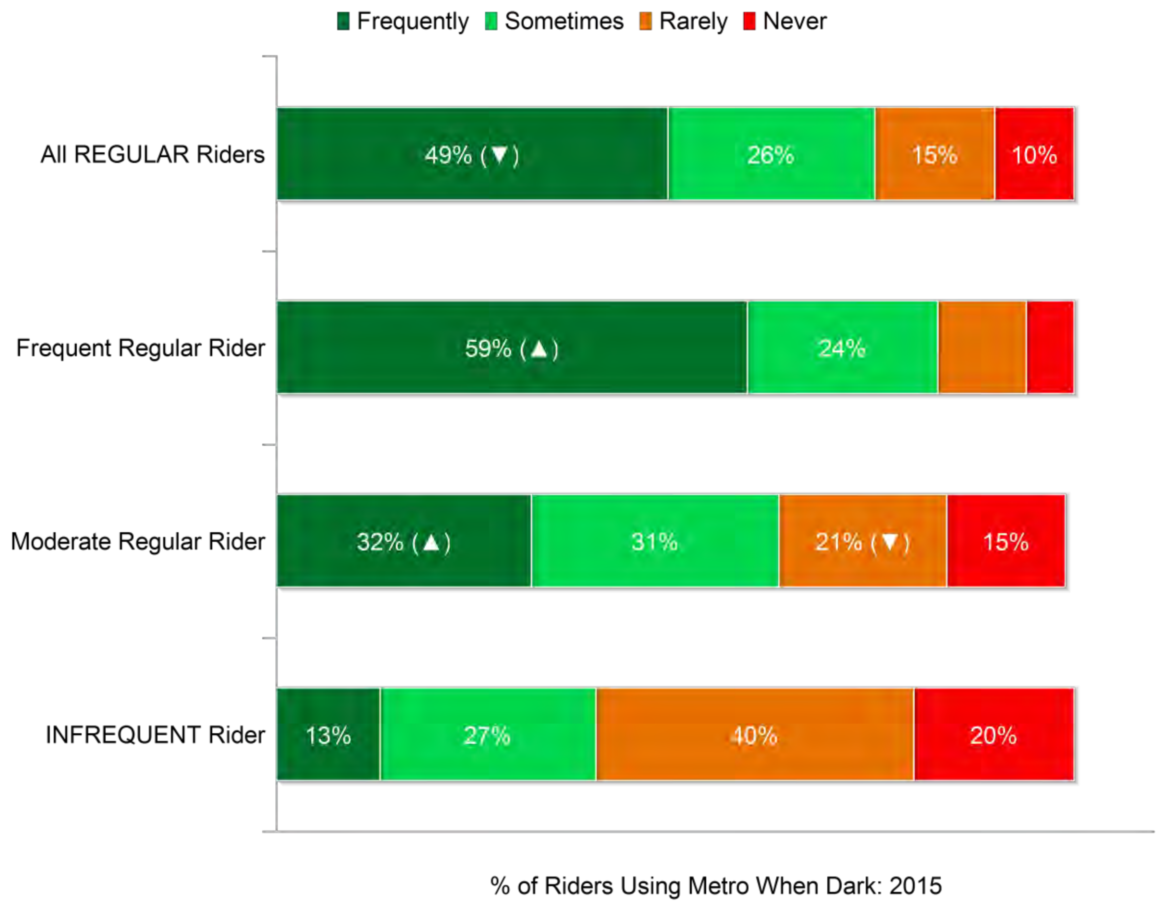
	2010	2011	2012	2013	2014	2015
n	1,140	1,455	1,218	1,395	1,102	1,025
n_w	1,140	1,455	1,218	1,395	1,161	1,025

▲ / ▼ indicates a statistically significant change from previous year

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

- The percentage reporting they frequently ride when it is dark decreased for all Rider segments since 2014. However, the decrease is greatest among Frequent Regular Riders—decreasing from 66 percent in 2014 to 59 percent in 2015.

Figure 25: Extent to Which Riders Use Metro When It Is Dark by Frequency of Riding



Base: Regular and Infrequent Riders 2015

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	922	585	337	103
n_w	669	413	257	356

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

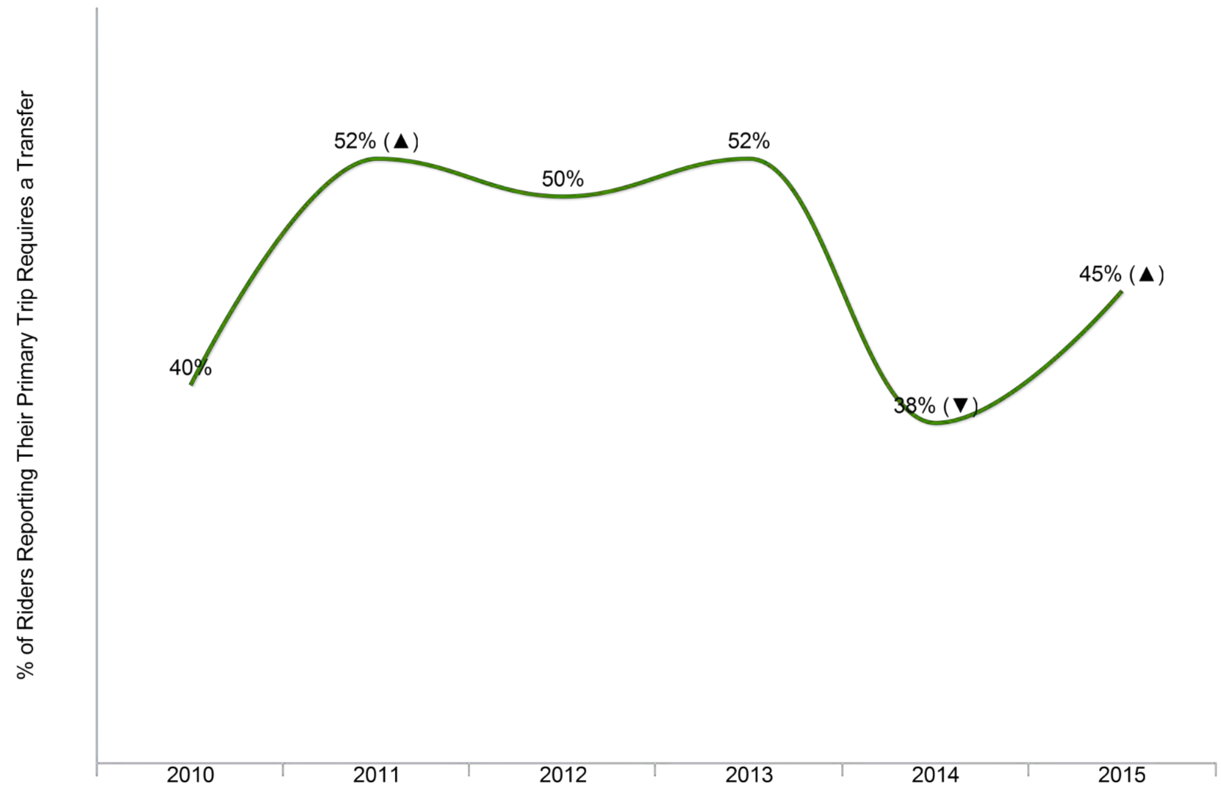
Transferring

Overall Transfer Rates

After decreasing significantly in 2014, the percentage of Riders whose primary trip requires a transfer increased.

The total transfer rate still remains below 2011 through 2013.

Figure 26: Transfer Rates for Primary Trip



Question: TRIP_5A How many transfers do you usually make on the trip you take most often?

Base: Regular and Infrequent Riders

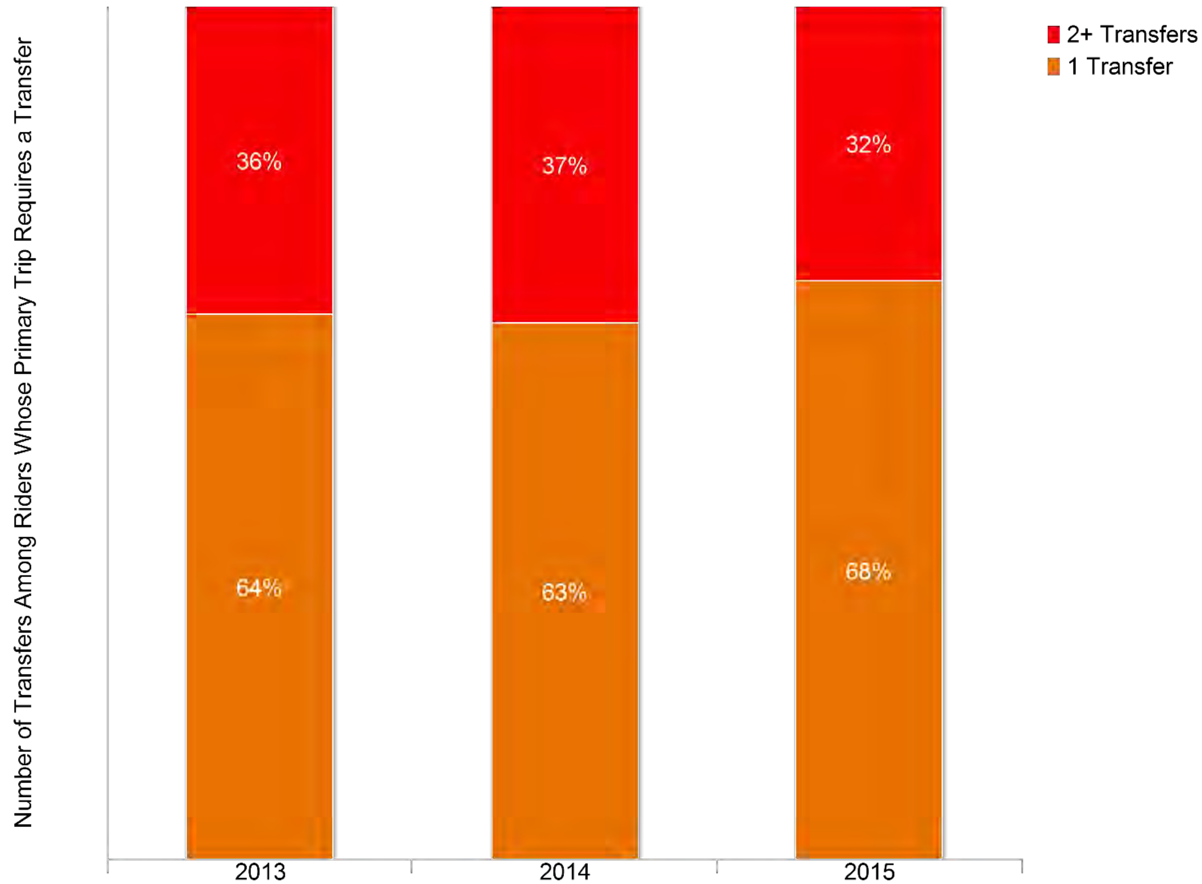
	2010	*2011*	*2012*	*2013*	*2014*	*2015*
n	*1,140*	*1,455*	*1,218*	*1,395*	*1,102*	*1,025*
n_w	*1,140*	*1,455*	*1,218*	*1,395*	*1,161*	*1,025*

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

The majority of those who transfer make a single transfer.

This has not varied significantly over the years.

Figure 27: Number of Transfers



Question: TRIP_5A How many transfers do you usually make on the trip you take most often?

Base: Regular and Infrequent Riders Who Transfer

	2013	2014	2015
n	*714*	*440*	*460*
n_w	*725*	*440*	*461*

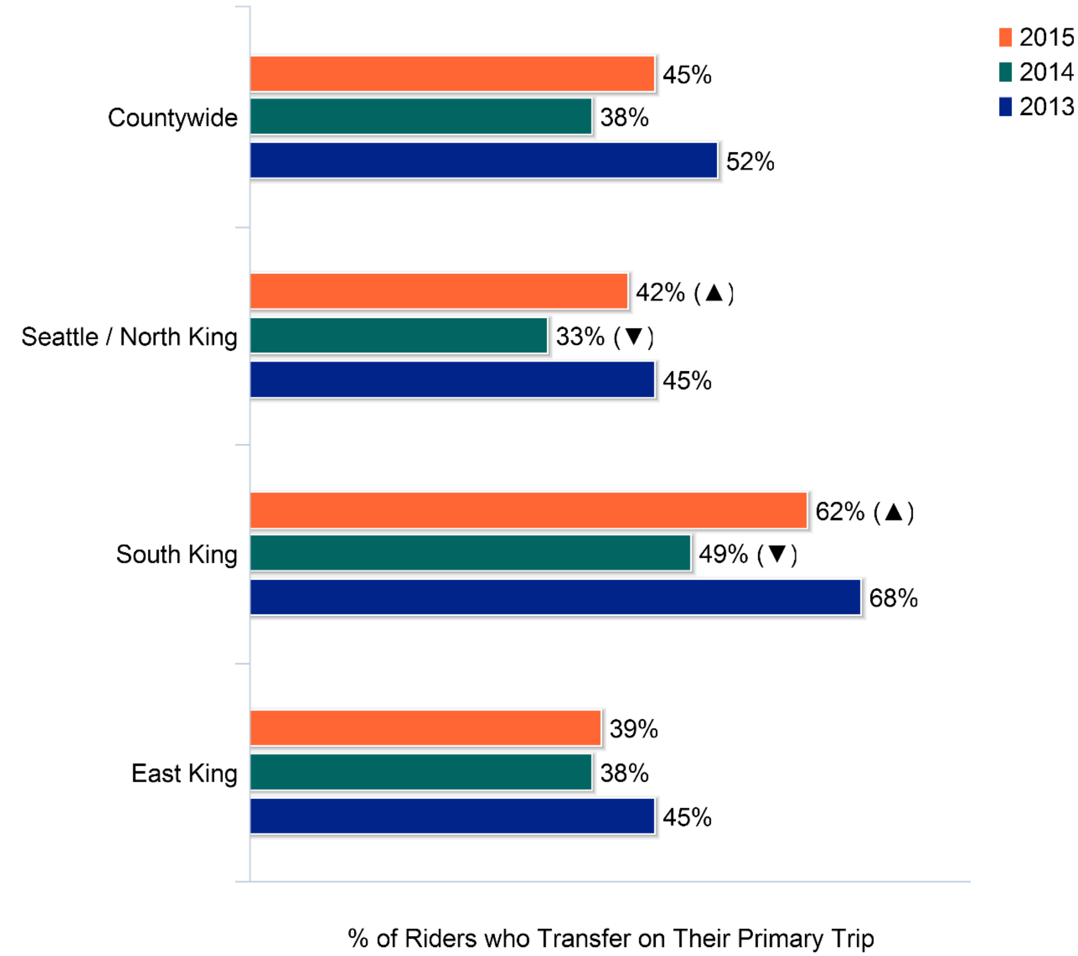
▲ / ▼ *indicates a statistically significant change from previous year*

The percentage of Riders reporting that their primary trip requires a transfer increased significantly in South King County and, to a lesser extent, in Seattle / North King County, but are below 2013 levels.

- South King County Riders continue to be the most likely to take trips that require a transfer.

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

Table 10: Percentage Transferring by Area of Residence



Question: TRIP_5A How many transfers do you usually make on the trip you take most often?

Base: Regular and Infrequent Riders

	Seattle / N. King County			*South King County*			*East King County*		
	2013	*2014*	*2015*	*2013*	*2014*	*2015*	*2013*	*2014*	*2015*
n	*509*	*540*	*472*	*442*	*273*	*269*	*444*	*289*	*284*
n_w	*730*	*619*	*641*	*428*	*293*	*190*	*238*	*251*	*193*

▲ / ▼ indicates a statistically significant change from previous year

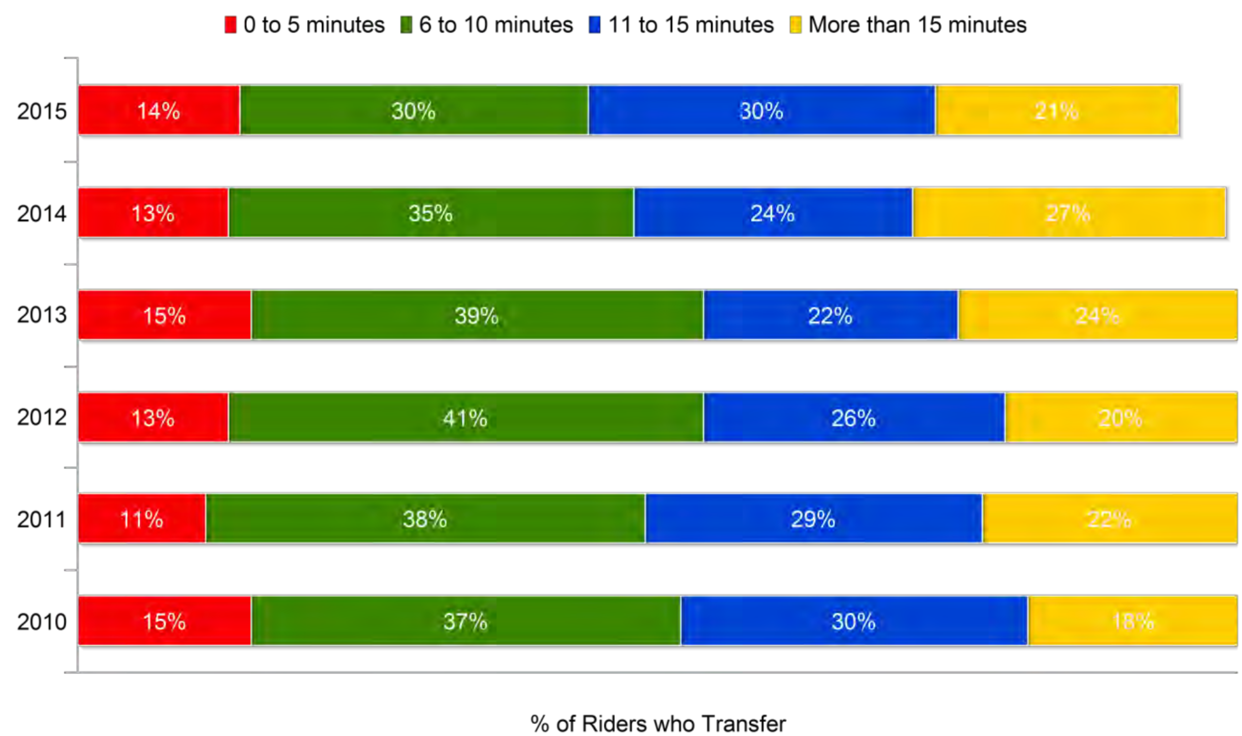
Wait Time When Transferring

Wait times when transferring have varied little over the years.

- Riders who transfer wait an average of 14 to 15 minutes.
- Wait times decreased slightly between 2014 and 2015.

	Average Wait Time (Minutes)	
	Mean	Median
2015	14.5	12.6
2014	15.4	13.1
2013	14.8	12.0
2012	13.9	11.5
2011	15.9	12.0
2010	13.2	10.9

Figure 28: Wait Time When Transferring



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

Base: Regular and Infrequent Riders Who Transfer

	2010	2011	2012	2013	2014	2015
n	479	728	619	714	440	460
n_w	458	752	608	725	440	461

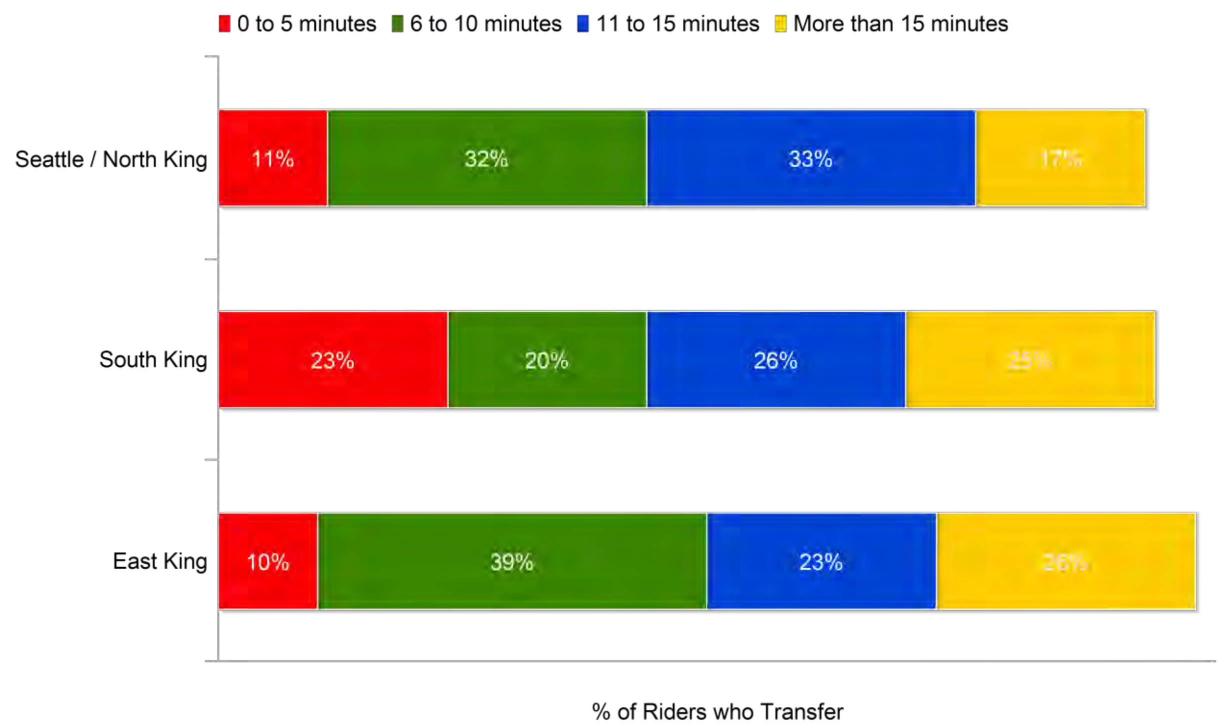
▲ / ▼ *indicates a statistically significant change from previous year*

Wait time when transferring varies by area of residence.

- While a greater percentage of South King County Riders transfer (62%), a relatively high percentage of those transferring wait five minutes or less.
- East King County Riders have the longest wait times. Two out of five report waiting between six and ten minutes; average wait time is 16 minutes.

	Average Wait Time (Minutes)	
	Mean	Median
Seattle / North King	14.2	12.6
South King	14.1	13.0
East King	16.0	12.0

Figure 29: Wait Time When Riding by Area of Residence



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

Base: Regular and Infrequent Riders Who Transfer; Year: 2015	*Seattle / North King*	*South King*	*East King*
n	*199*	*154*	*107*
n_w	*268*	*117*	*75*

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

Bus Stop Access

More than three out of four Riders walk to the bus stop they use most often.

Riders living in Seattle / North King County are significantly more likely to walk to their bus stop.

- More than two out of five Riders who walk to their stop walk one block or less.

Figure 30: How Riders Access Bus Stop They Use Most Often

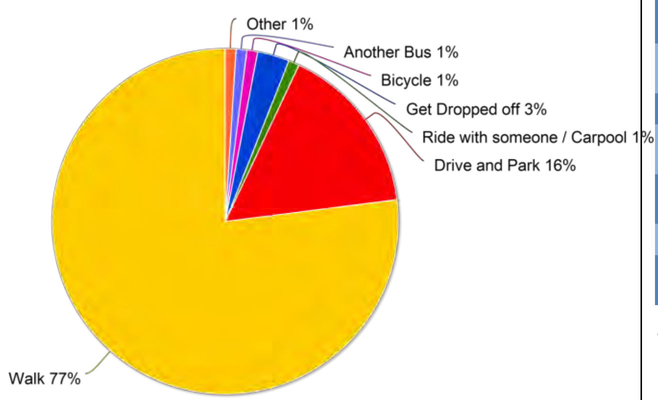


Table 11: How Riders Access Bus Stop by Area of Residence

	(a) Seattle / North King	(b) South King	(c) East King
Walk	90% (b▲,c▲)	63% (c▲)	45%
Drive and Park	5%	25% (a▲)	45% (a▲,b▲)
Ride with someone / Carpool	1%	1%	1%
Get Dropped off	1%	6% (a▲)	5% (a▲)
Bicycle	1%	1%	4% (a▲,b▲)
Another Bus	1%	2%	1%
Other	1%	1%	0% -

Table 12: Distance Riders Walk from Home to Stop by Area of Residence

	(a) Seattle / North King	(b) South King	(c) East King
< 1 Block	21%	43% (a▲)	35% (a▲)
1 Block	21% (c▲)	12%	10%
2 < 5 Blocks	46%	39%	43%
5 < 10 Blocks	10%	5%	12%
10+ Blocks	1%	1%	1%

*Question: DS1A How do you **usually** get from home to the bus stop you use most often?*

	n	n_w
Base: Regular and Infrequent Riders 2015	*1,025*	*1,204*

Question: DS1B Approximately how far is it from your home to the Metro bus stop you use most often?
Base: Riders who Walk to Stop 2015

	Seattle / North King	*South King*	*East King*
n	*351*	*103*	*73*
n_w	*482*	*76*	*56*

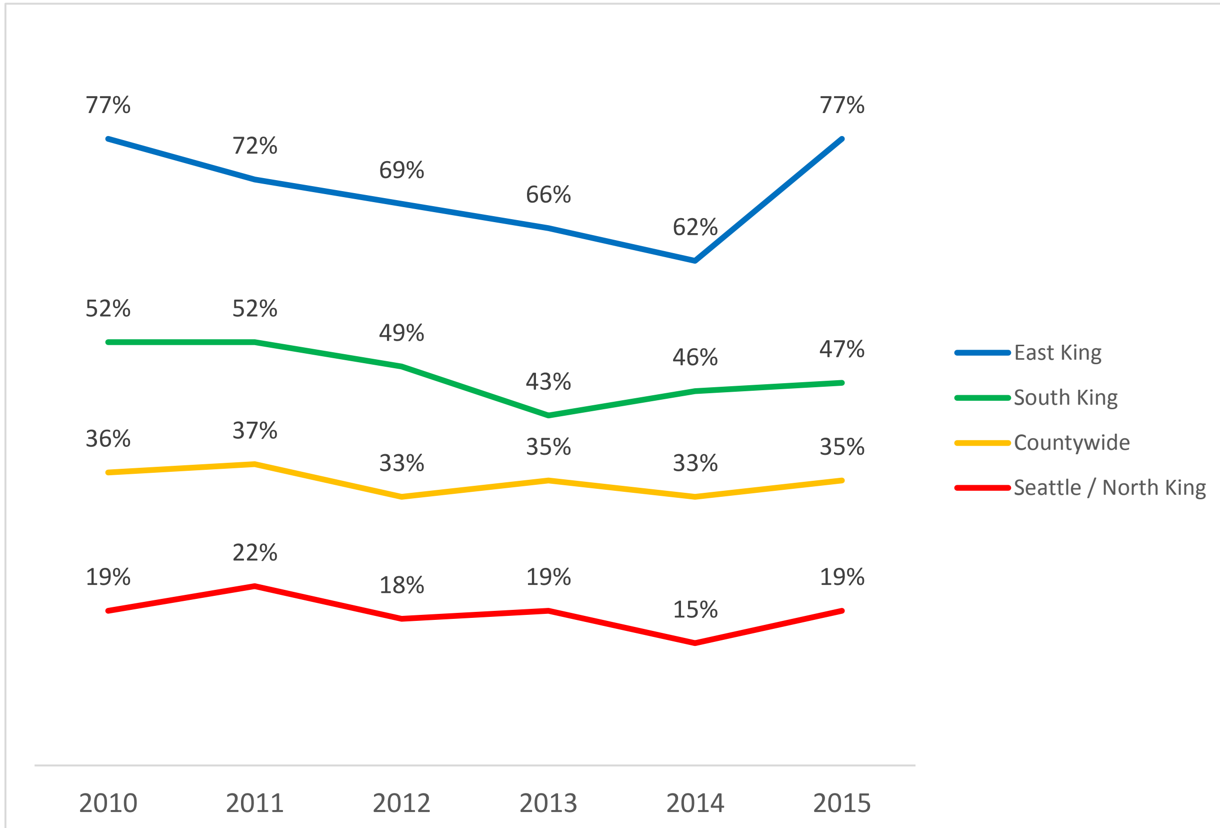
Park-and-Ride Lot Use

Overall Use

Riders' reported overall use of park-and-ride has remained relatively stable over the years.

While use of park-and-ride lots continues to be highest among East King County Riders, usage decreased between 2010 and 2014. Use increased in 2015 and returned to the peak last seen in 2010.

Figure 31: Trends in Park-and-Ride Lot Use



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

Base: Regular and Infrequent Riders

	2010	2011	2012	2013	2014	2015
n	1,140	1,455	1,218	1,395	1,102	1,025
n_w	1,140	1,455	1,218	1,395	1,161	1,025

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

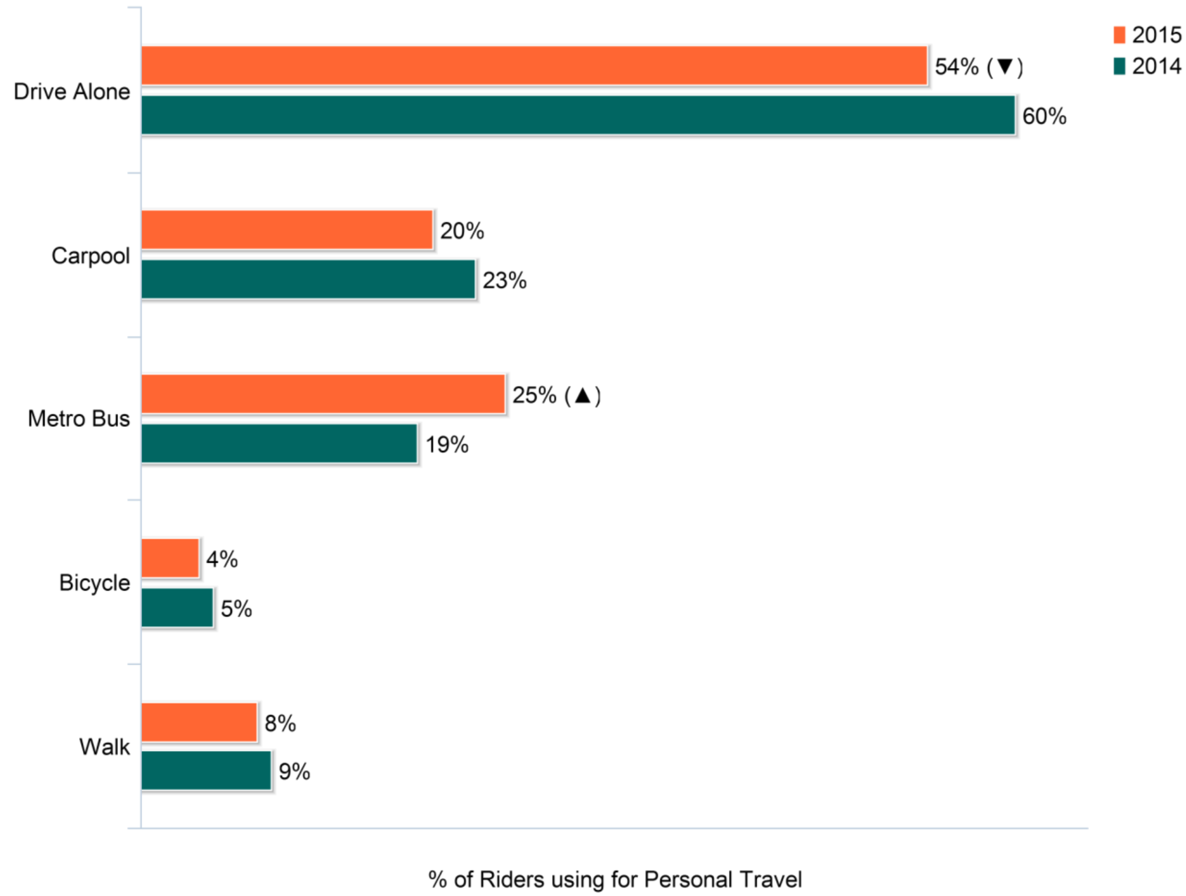
Personal Travel

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

- However, that percentage decreased between 2014 and 2015.

One out of four Riders use Metro for their person travel—a significant increase from 2014.

Figure 32: Personal Travel Mode(s)



Question: PT1: How do you usually use to get around for most of your personal travel? Sums to more than 100%; multiple responses allowed. Response categories with less than 5% of respondents are not shown

Base: Regular and Infrequent Riders

	2014	*2015*
n	*1,102*	*1,025*
n_w	*1,161*	*1,025*

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

FINDINGS: FARE PAYMENT

Summary

Topic	What We Found	What It Means
Fare Payment Method	Nearly seven out of ten Riders use ORCA to pay their fares. Overall use of ORCA Cards has continued to grow slightly. ORCA use continues to be significantly higher among Regular than Infrequent Riders. After increasing significantly between 2013 and 2014, the percentage of Frequent Regular Riders using ORCA held steady at 85 percent. The use of cash to pay fares has decreased	As noted over the past several years, the rate of increase in ORCA market share has slowed, and is likely close to its maximum without new, value-added features.

All Riders	**2013**	**2014**	**2015**
TOTAL ORCA	66%	68%	69%
CASH / TICKETS	28%	27%	23%▼
TOTAL RRFP (Includes RRFP On and Not On ORCA Card)	12%	16%▲	17%

TOTAL ORCA	**2013**	**2014**	**2015**
Regular Riders	73%	79%▲	78%
Frequent Regular Riders	79%	84%▲	85%
Moderate Regular Riders	64%	68%	67%
Infrequent Riders	54%	50%	51%

Total ORCA includes Adult & Youth ORCA, U-PASS, RRFP on ORCA, Access Card, etc.
Total RRFP includes RRFP on and not on ORCA
Significant increase (▲) or (▼) from previous year

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Products on ORCA Card</td>
<td>Riders who pay with ORCA are somewhat more likely to have a pass than an E-Purse on their card. The extent to which Riders have a pass on their ORCA Card increased between 2014 and 2015 due to a significant increase in the percentage with a pass other than U-PASS.

Regular Riders, notably Frequent Regular Riders, are more likely to have a pass on their ORCA Card—61% of Regular Riders compared to 25% of Infrequent Riders.</td>
<td>
<table>
<tr><th></th><th>2013</th><th>2014</th><th>2015</th></tr>
<tr><td>TOTAL E-PURSE</td><td>41%</td><td>52%▲</td><td>49%</td></tr>
<tr><td>TOTAL PASS</td><td>51%</td><td>49%</td><td>53%</td></tr>
<tr><td>U-PASS</td><td>13%</td><td>13%</td><td>11%</td></tr>
<tr><td>OTHER PASS</td><td>38%</td><td>36%</td><td>42%▲</td></tr>
</table>
Significant increase (▲) or (▼) from previous year
</td>
<td>Regular Riders clearly understand the point where it makes more sense to have a pass versus an E-Purse on their ORCA Card.

Making it easier to load value on an E-Purse may encourage more Moderate Regular and Infrequent Riders to use ORCA and E-Purse rather than paying with cash.</td>
</tr>
<tr>
<td>Subsidies</td>
<td>The extent to which Riders state their employer or school subsidizes passes and/or E-Purses decreased significantly between 2014 and 2015 and continues the ongoing decrease from 2010, when nearly three out of four (73%) riders received a subsidy. Riders commuting to work on Metro are nearly twice as likely as those riders using another mode to report that they receive a subsidy.</td>
<td>
<table>
<tr><th colspan="3">RECEIVE SUBSIDY</th></tr>
<tr><th>2012</th><th>2013</th><th>2014</th></tr>
<tr><td colspan="3">All Riders (Commuters)</td></tr>
<tr><td>54%</td><td>52%</td><td>44%▼</td></tr>
<tr><td colspan="3">Metro Bus Commuters</td></tr>
<tr><td>66%</td><td>68%</td><td>66%</td></tr>
</table>
Significant increase (▲) or (▼) from previous year
</td>
<td>Instead of offering subsidies, employers may be encouraging employees to elect to place tax-free dollars into their flexible spending accounts (FSAs) or transportation spending accounts (TSA) to pay for the transportation benefits. Customers who pay for part of their pass through a FSA or TSA may simply not be aware that their employer is also providing a subsidy.

At the same time, receiving a subsidy is clearly an incentive for commuters to use Metro rather than some other mode.</td>
</tr>
</table>

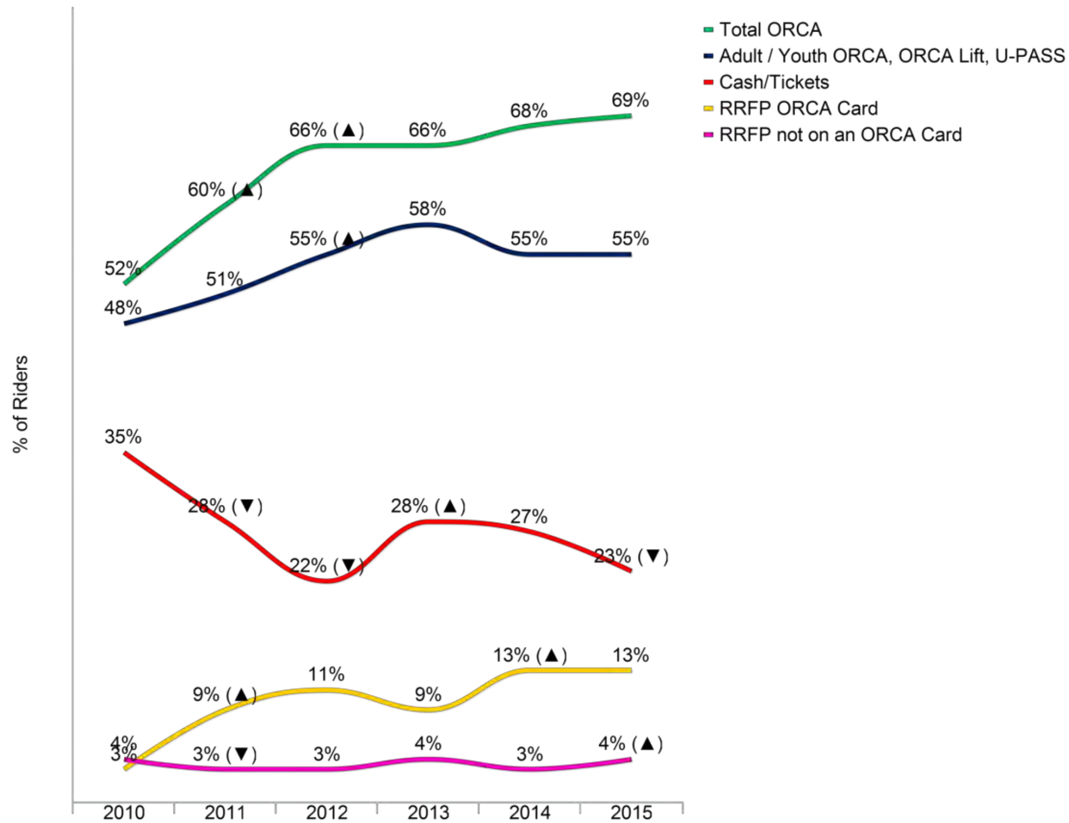
Primary Fare Payment Method

ORCA is the primary method of fare payment and has increased slowly since 2013.

- Riders are three times as likely to pay with ORCA as cash.
- Use of cash or tickets has been decreasing since 2013 and saw a significant decline in 2015.

One out of six (17%) Riders have a Regional Reduced Fare Permit, for seniors and riders with disabilities. Approximately one out of four Riders using an RRFP continue to report using an RRFP that is not on an ORCA Card.

Figure 33: Trends in Fare Payment



Questions: F0 How do you usually pay your bus fare?
Adult / Youth ORCA includes ORCA Cards (Adult & Youth Fares), U-PASS, Access Pass, School District Card
Total ORCA includes Adult / Youth ORCA and RRFP ORCA; the sum of Adult / Youth ORCA and RRFP ORCA may not sum to Total ORCA due to rounding

Base: Regular and Infrequent Riders

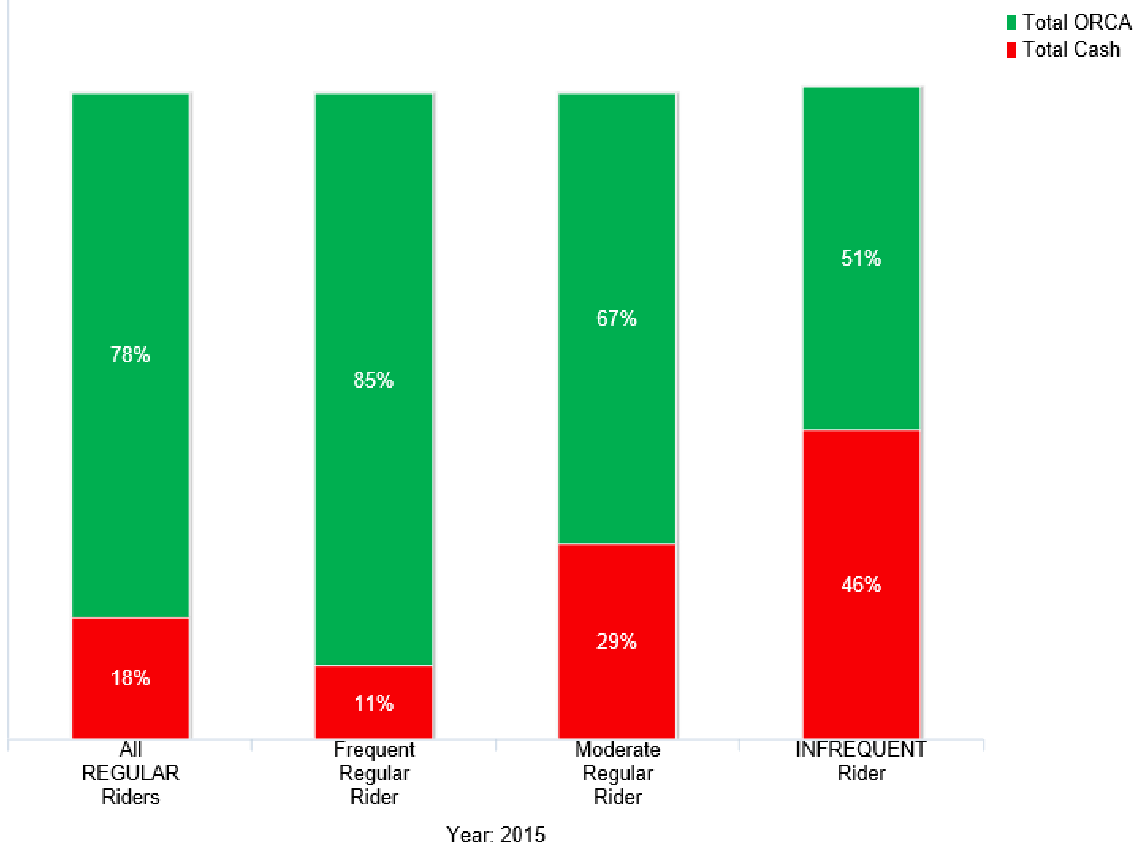
	2010	2011	2012	2013	2014	2015
n	1,140	1,455	1,218	1,395	1,102	1,025
n_w	1,140	1,455	1,218	1,395	1,161	1,025

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

Frequency of riding is highly related to ORCA Card use.

- While more than four out of five Regular Riders use ORCA, nearly half of Infrequent Riders use cash.
- More than four out of five Frequent Regular Riders and two out of three Moderate Regular Riders pay with ORCA.

Figure 34: Use of ORCA Cards and Cash to Pay Fares (2015) by Frequency of Riding



Questions: F0 How do you usually pay your bus fare?
Total ORCA Includes ORCA Cards (Adult & Youth Fares), RRFP loaded on ORCA, U-PASS, Access Pass, School District Card
Total Cash includes Cash, Tickets, RRFP not on an ORCA Card
Columns sum to less than 100% other methods other responses that could not be classified into these categories are not included

Base: Regular and Infrequent Riders 2015

	REGULAR Riders	Frequent Regular Riders	Moderate Regular Riders	INFREQUENT Riders
n	922	585	337	103
n_w	669	413	257	356

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

Demographics of Cash and ORCA Users

Income continues to be a distinguishing factor between paying cash and using ORCA. ORCA use increases as incomes rise above $75,000.

	% Cash	% ORCA
<$35,000	33%	65%
$35,000-<$55,000	28%	68%
$55,000-<$75,000	34%	63%
$75,000-<$100,000	26%	72%
$100,000 Plus	20%	75%

ORCA Includes ORCA Cards (Adult & Youth Fares), RRFP loaded on ORCA, U-PASS, Access Pass, School District Card
Cash includes Cash, Tickets, RRFP not on an ORCA Card

A significant percentage of those paying cash are retired, due in part to the inclusion of RRFP Fares not on an ORCA Card that are considered cash fares.

Table 13: Demographics: Fare Payment Media

	CASH (n=203; n_w=281)	ORCA (n=785; n_w=705)
GENDER		
MALE	56%	51%
FEMALE	44%	49%
AGE		
16–17	7%▲	2%▼
18–34	29%	31%
35–54	29%	31%
55 PLUS	35%	33%
MEAN	45.1	44.6
EMPLOYMENT STATUS		
EMPLOYED	60%	69%
STUDENT	9%	10%
RETIRED	22%▲	14%▼
NOT WORKING	9%	7%
INCOME		
<$35K	28%	22%
$35K–$55K	16%	15%
$55K–$75K	17%	12%
$75K–$100K	16%	18%
$100K PLUS	22%▼	33%▲
MEDIAN	$63,000	$77,928
HH COMPOSITION		
% SINGLE-PERSON	35%	28%
AVERAGE HH SIZE	2.50	2.47
RACE/ETHNICITY		
CAUCASIAN ALONE	77%▲	68%▼
ASIAN ALONE	9%▼	16%▲
BLACK ALONE	3%	6%
HISPANIC	7%	5%
MIXED RACE / OTHER	6%	5%
VEHICLE ACCESS		
% W/ LICENSE	79%	82%
% W/ VEHICLES	88%	83%
MEAN # VEHICLES	1.83	1.52

Base: Regular and Infrequent Riders; Year: 2015
▲ / ▼ indicates a statistically significant difference between respondent group
** Columns sum to more than 100%; multiple responses allowed*

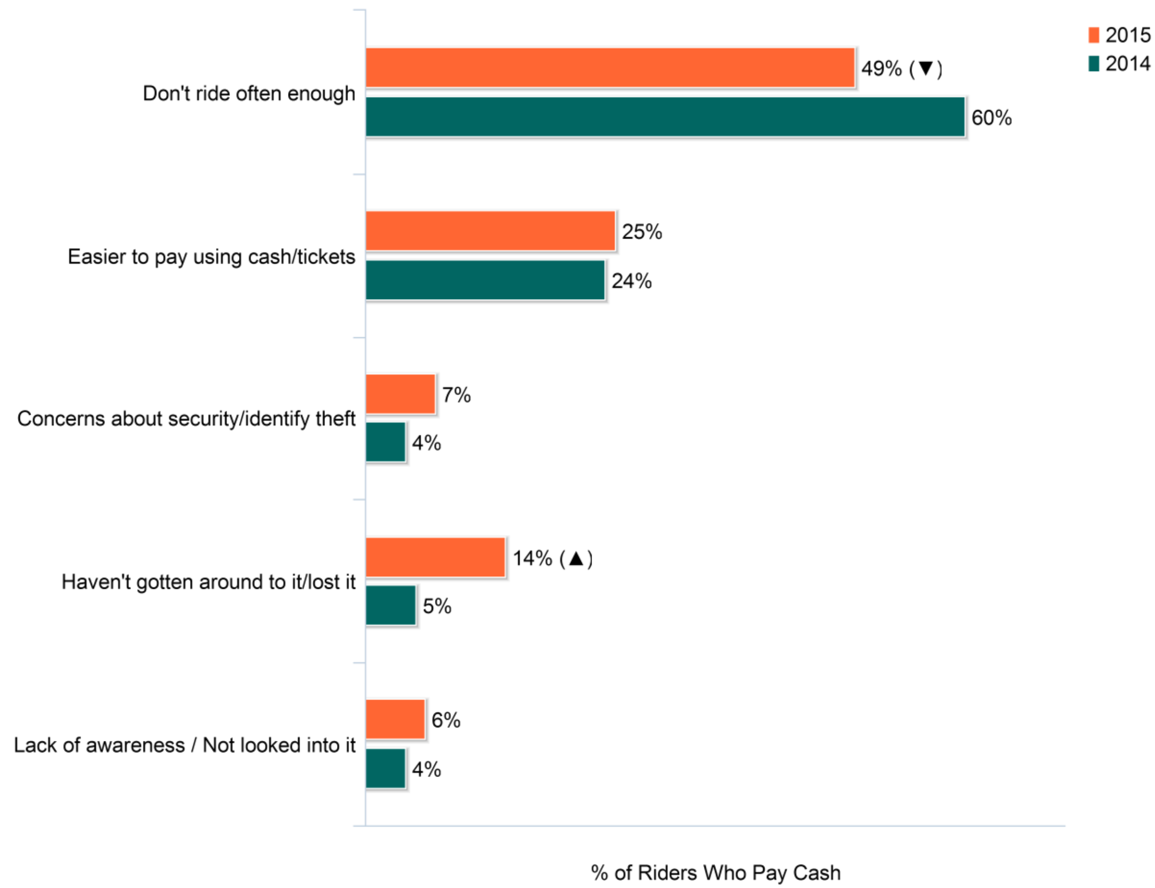
Reasons for Paying with Cash

Not riding often enough continues as the primary reason for using cash. However, the percentage citing this as a reason decreased significantly.

Ease or convenience is the second most frequently mentioned reason for using cash.

Simply not getting around to getting an ORCA Card increased as a reason for continuing to use cash.

Figure 35: Reasons for Paying with Cash



Questions: F4A You indicated that you use cash / tickets to pay your fare. Why do you prefer to use cash / tickets as opposed to an ORCA Card?

Base: Regular and Infrequent Riders Who Pay with Cash

	2014	2015
n	237	152
n_w	297	228

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

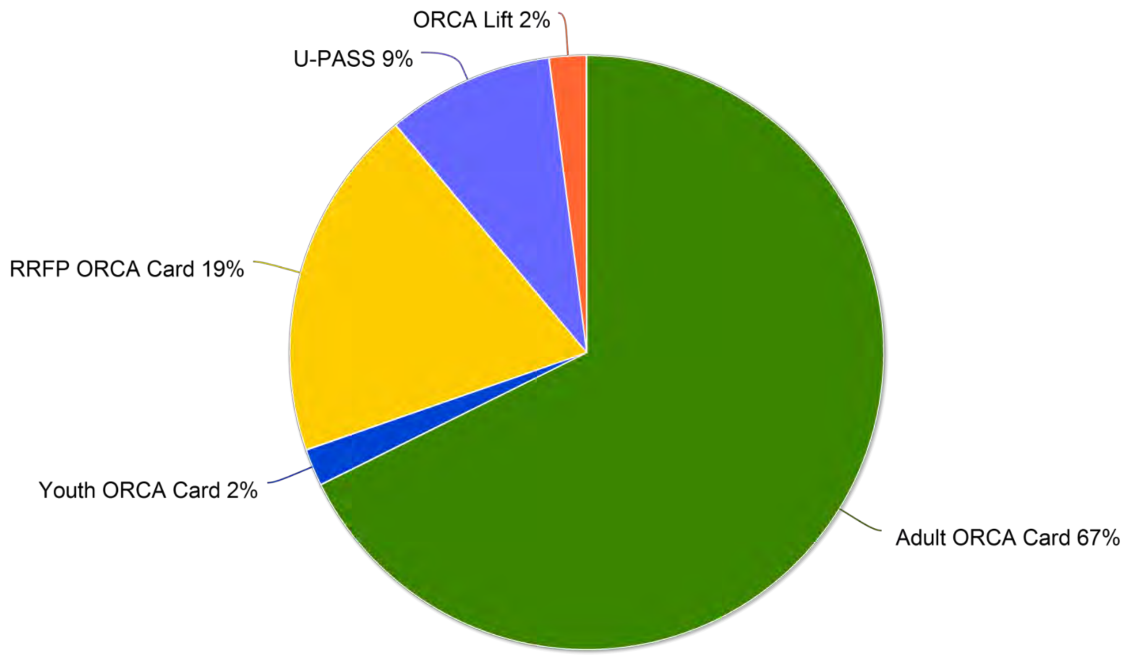
ORCA Cards

Type of ORCA Card

While the majority of Riders have ORCA Cards for adult fares, a significant percentage have RRFPs on an ORCA Card.

About 2 percent of respondents said they had the new ORCA LIFT Cards.

Figure 36: Type of ORCA Card



Questions: F F1A Is your ORCA card a(n)…?

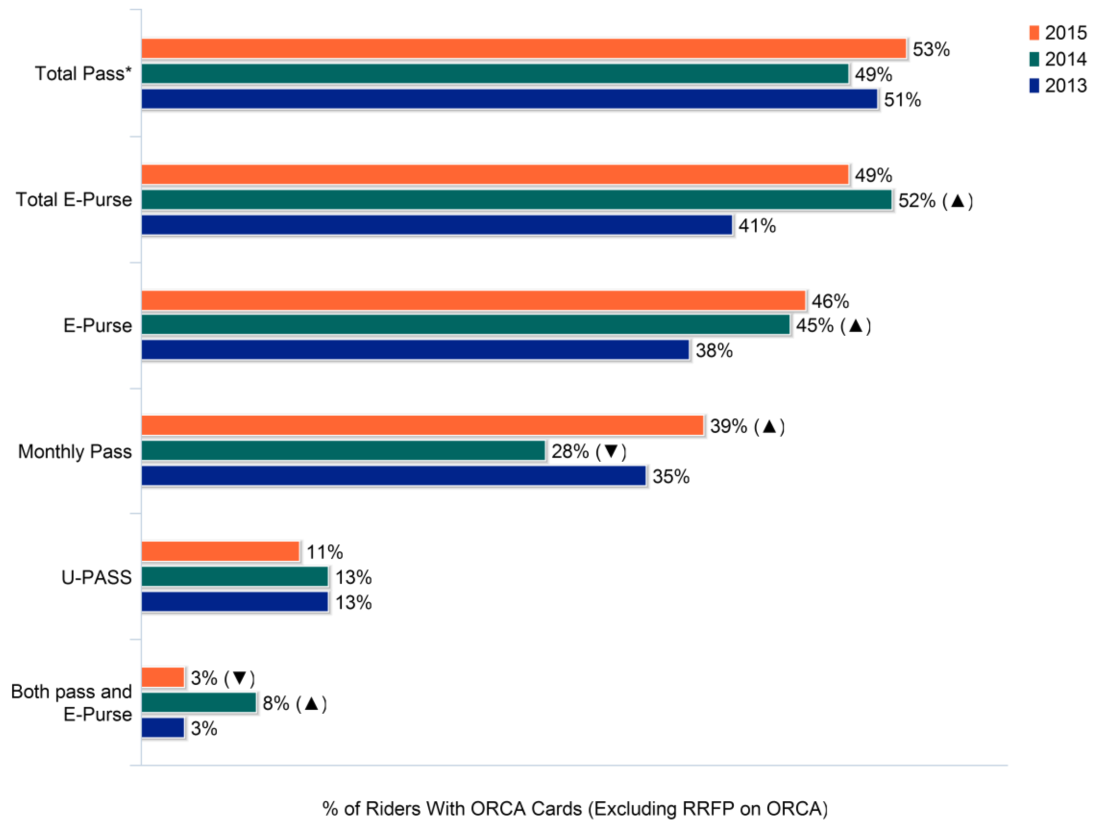
	n	n_w
Regular and Infrequent Riders Who Use ORCA 2015	*785*	*434*

Products on ORCA Cards

Riders are almost equally likely to have a pass or an E-Purse on their ORCA Card.

- The percentage of Riders with a pass on their ORCA Card increased slightly in 2015 due to an increase in the percentages with a monthly pass. The percentage of Riders with a U-PASS has remained relatively stable over the past several years.
- After increasing in 2014, the percentage with both a pass and an E-Purse decreased significantly, returning to 2013 levels.

Figure 37: Products on ORCA Card



Questions: F1D Do you have a pass or an E-Purse on your ORCA Card?
Total E-Purse includes those with E-Purse only and both a pass and E-Purse
**Total Pass includes those with a pass (monthly or U-PASS) only and both a pass and E-Purse*

Base: Regular and Infrequent Riders who pay fare with Adult or Youth ORCA Card or U-PASS

	2013	2014	2015
n	730	596	664
n_w	455	580	511

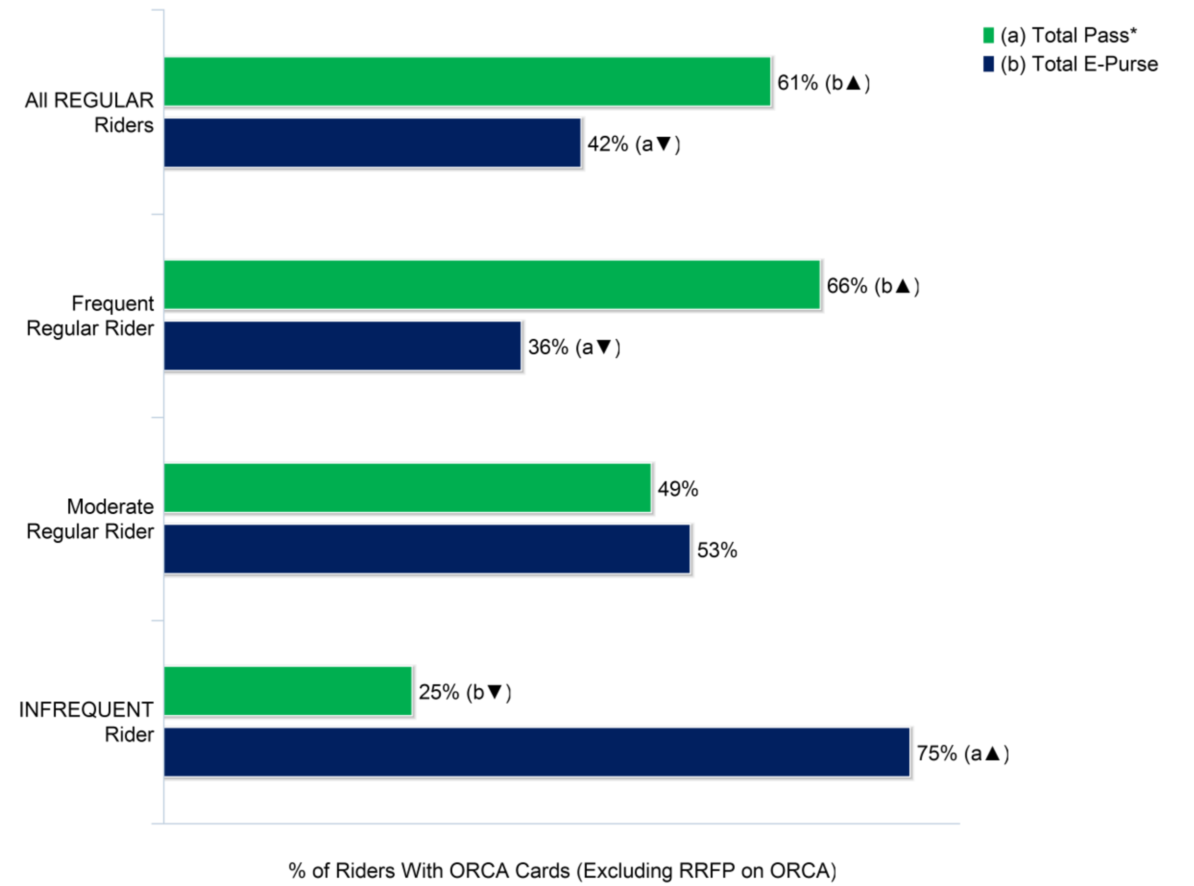
▲ / ▼ *indicates a statistically significant change from previous year*

Regular Riders, notably Frequent Regular Riders, are more likely to have a pass on their ORCA Cards.

Moderate Riders are almost equally likely to have a pass or an E-Purse on their card.

Infrequent Riders are more likely to have an E-Purse rather than a pass on their card.

Figure 38: Products on ORCA Card by Frequency of Riding



Questions: F1D Do you have a pass or an E-Purse on your ORCA Card?
Total E-Purse includes those with E-Purse only and both a pass and E-Purse
**Total Pass includes those with a pass (monthly or U-PASS) only and both a pass and E-Purse*

Base: Regular and Infrequent Riders who pay fare with an Adult or Youth ORCA Card or U-PASS; Year: 2015

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

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

Employer / School Subsidies

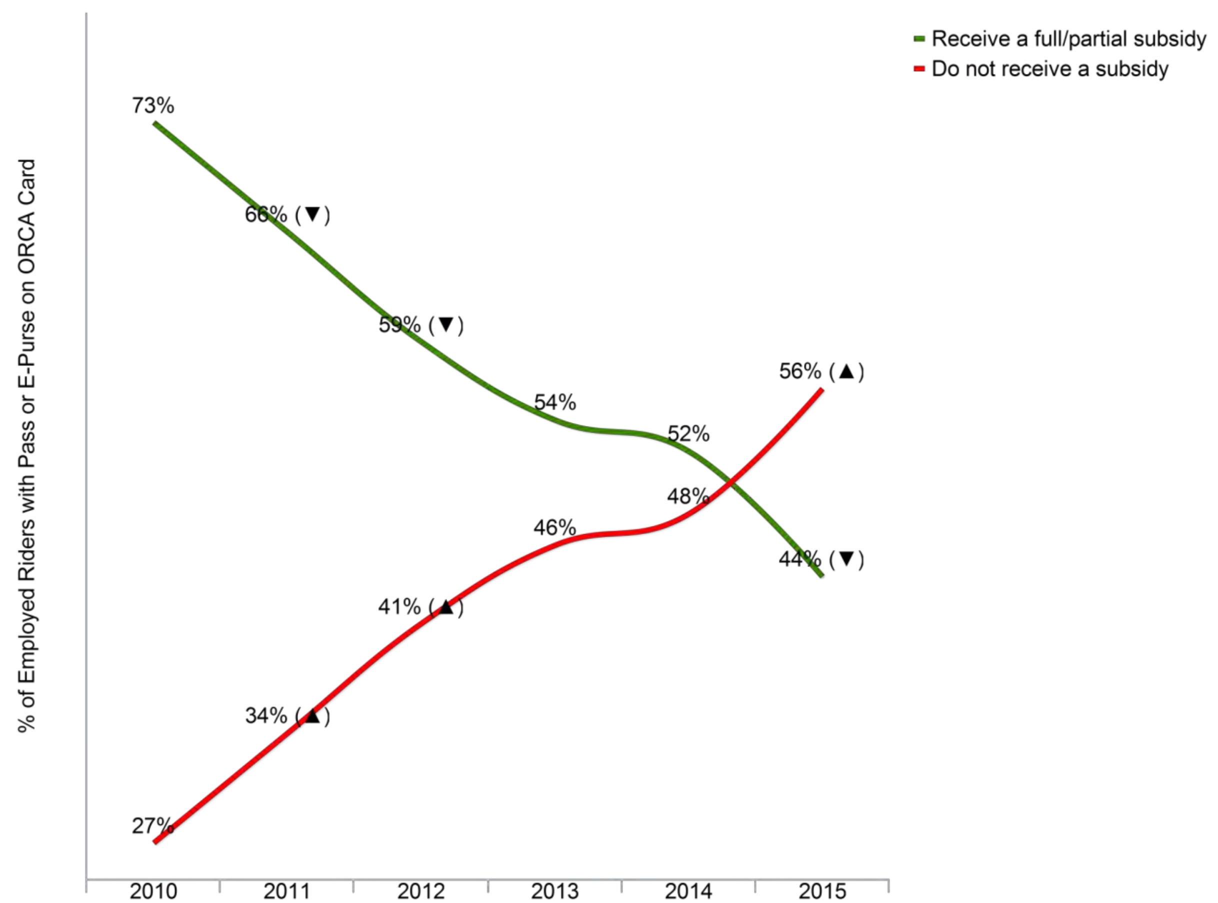
The extent to which Riders report that their employers or school provide a full or partial subsidy has decreased every year since 2010.

It is now at the point where more Riders say they do **not** receive a subsidy than do.

Two out of three Metro bus commuters receive a full or partial subsidy for the cost of their pass or E-Purse. This has been relatively stable for the past several years. However, the current percentage of Metro Bus Commuters receiving a subsidy is significantly lower than the peak in 2010.

	% of Metro Bus Commuters Receiving Full / Partial Subsidy
2015	66%
2014	68%
2013	66%
2012	70%
2011	66%
2010	77%

Figure 39: Employer / School Subsidies



Questions: F3A Does your employer or school pay for part or all of your ORCA pass or E-purse?

	Commuters who have a pass or E-Purse on ORCA Card or U-PASS					
	2010	*2011*	*2012*	*2013*	*2014*	*2015*
n	*531*	*544*	*573*	*551*	*686*	*927*
n_w	*473*	*238*	*564*	*344*	*665*	*854*

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

FINDINGS: SOURCES OF INFORMATION ABOUT METRO

Summary

Topic	What We Found		What It Means
Information Sources	Mobile and online sources are the most commonly used sources of information about Metro.	**% OF RIDERS WHO USE** **SMARTPHONE** 62% **METRO ONLINE / REGIONAL TRIP PLANNER** 53% **INFORMATION AT STOPS** 36% **PRINTED TIMETABLES** 25% **SOCIAL MEDIA** 1% **ALERTS (TEXT AND/OR EMAIL)** 1%	Metro should continue to grow its online and mobile capabilities to provide Riders with information. However, while information at stops and printed timetables are used less often by all Riders, they continue to be primary sources of information for Riders without Smartphones and to reach these riders Metro must continue to provide information through these more traditional media.
Smartphones	More than four out of five Riders own a smartphone, up significantly from 2012, the first year this question was asked. • Smartphone ownership among Riders is higher than the national average of 64%*. Riders are increasingly using smartphones to get information. **Source: http://www.pewinternet.org/2015/04/01/chapter-one-a-portrait-of-smartphone-ownership/*	**2012** / **2015** **SMARTPHONE OWNERSHIP** 60% / 84%▲ **USE TO GET INFORMATION ABOUT METRO** **ALL RIDERS** 44% / 62%▲ **REGULAR RIDERS** 49% / 68%▲ **INFREQUENT RIDERS** 35% / 51%▲ *Significant increase (▲) or (▼) from baseline year (2012)*	While smartphone ownership is high and represents an important source of information about Metro, not all Riders have smartphones. Notably, lower income (less than $35,000) and older Riders (55 plus) continue to be less likely to own a smartphone. These Riders need alternative sources of information and may be more likely to use traditional sources of information.

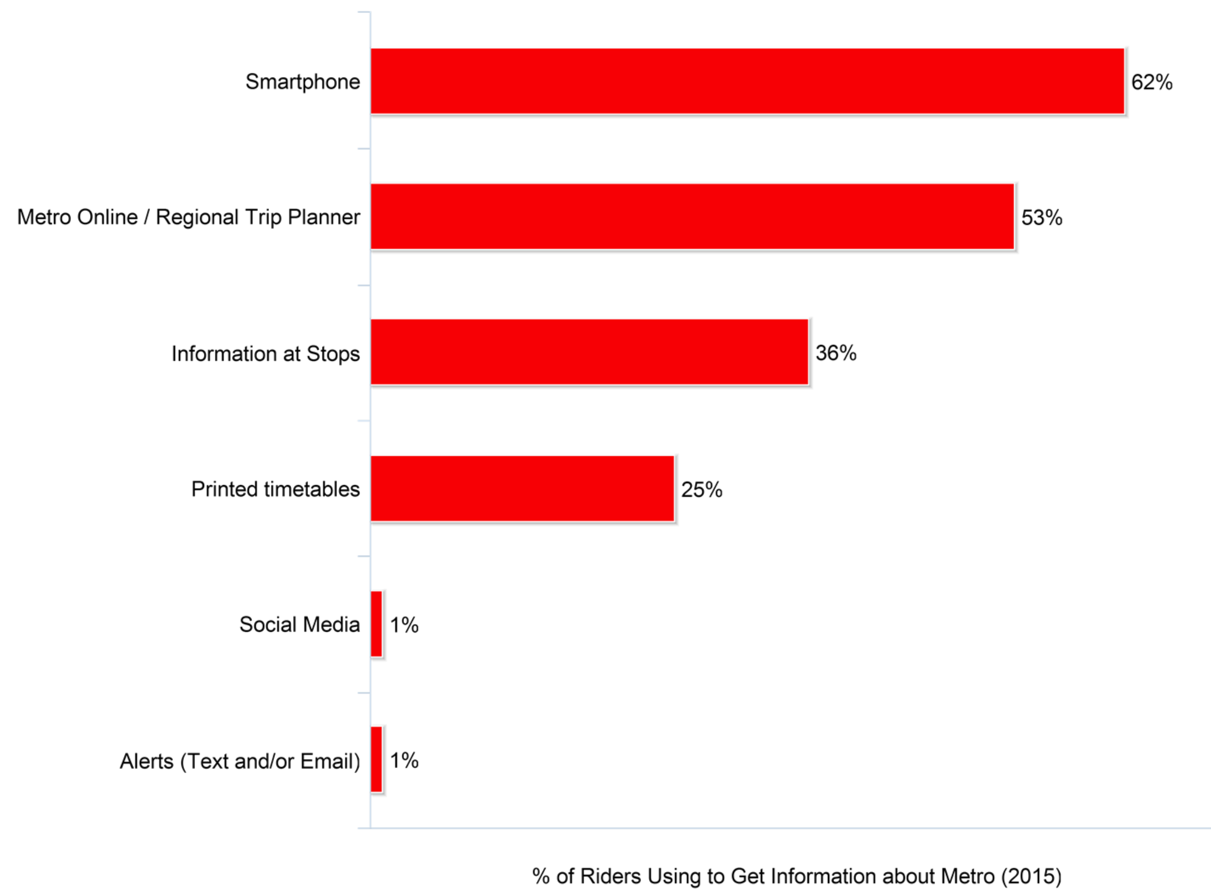
Primary Information Sources

Smartphones are the most frequently used source of information about Metro for all Riders.

A significant percentage of Riders also use information at tops and printed timetables. This is noteworthy for Riders without Smartphones.

	Have Smartphone	
	Yes	No
Smartphone	74%	0%
Metro Online / Regional Trip Planner	54%▲	46%▼
Information at Stops	33%▼	48%▲
Printed Timetables	20%▼	52%▲

Figure 40: Sources of Information about Metro



Questions: IN1 Which of the following do you use to get information about Metro? Multiple responses allowed.

	n	n_w
Base: Regular and Infrequent Riders; Year 2015	*1.025*	*1,025*

Regular Riders are more likely than Infrequent Riders to use Smartphones as their primary source of information about Metro. Interestingly, there were no other significant differences between Regular and Infrequent Riders in regards to information sources.

Table 14: Sources of Information by Rider Status

	ALL Riders	REGULAR Rider	INFREQUENT Rider
Smartphone	62%	68%	51%
Metro Online / Regional Trip Planner	53%	51%	55%
Information at Stops	36%	37%	35%
Printed timetables	25%	26%	22%

Use of Smartphones as a primary information source is clearly related to age. Older Riders are significantly more likely to use the more traditional information sources, Metro Online and printed timetables.

Table 15: Sources of Information by Age

	16-17	18 - 34	35 - 54	55+
Smartphone	74%	80%	71%	36%
Metro Online / Regional Trip Planner	34%	41%	61%	57%
Information at Stops	28%	36%	35%	38%
Printed timetables	20%	20%	16%	38%

Finally, use of Smartphones and Metro online as primary sources of information about Metro is clearly related to income.

Table 16: Sources of Information by Income

	Less than $35,000	$35,000 to <$55,000	$55,000 to <$75,000	$75,000 to <$100,000	$100,000 or more
Smartphone	45%	57%	57%	71%	78%
Metro Online / Regional Trip Planner	40%	63%	52%	62%	55%
Information at Stops	38%	30%	46%	31%	35%
Printed timetables	34%	26%	38%	18%	12%

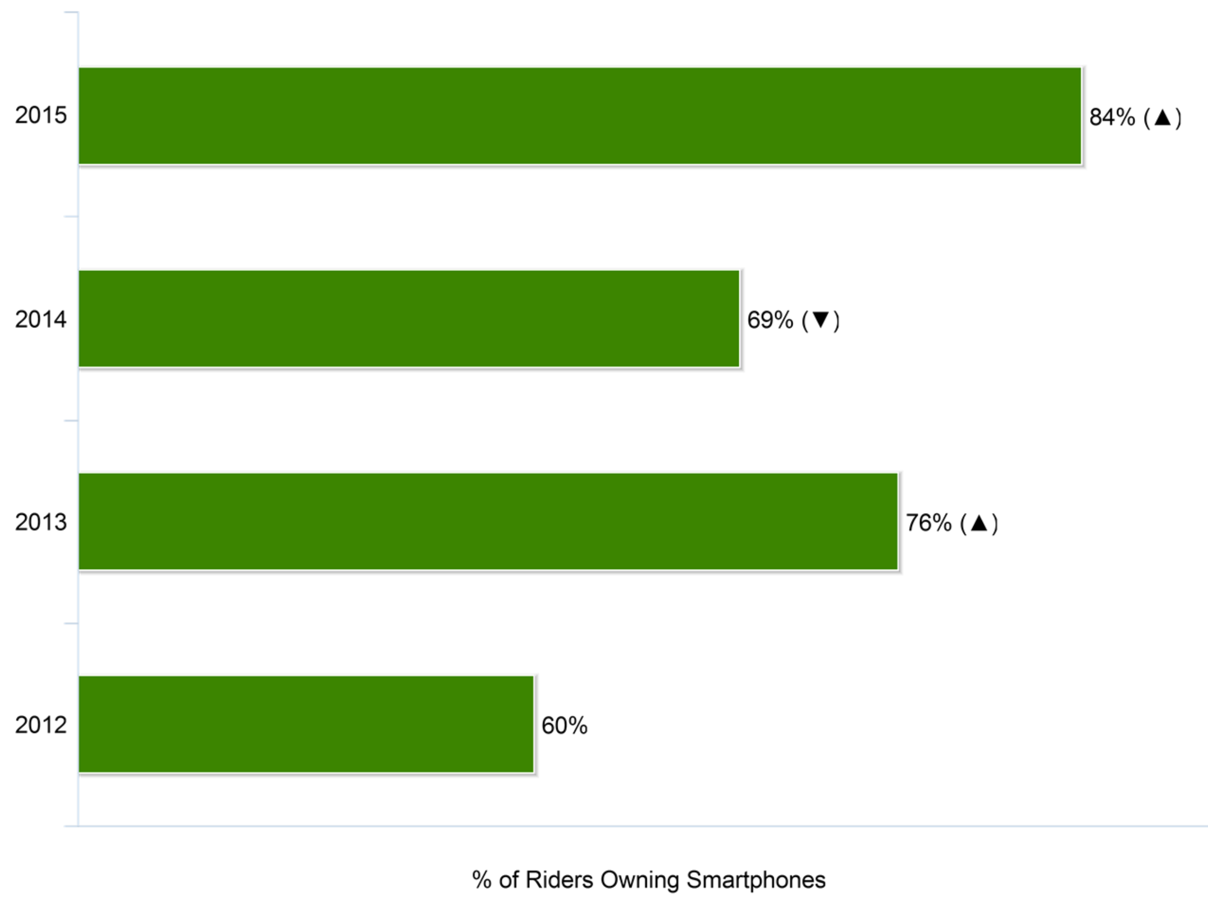
Smartphones

Ownership

More than four out of five Riders own a smartphone, a significant increase from 2014 and the highest ownership rate to date.

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

Figure 41: Smartphone Ownership



Questions: IN4A Do you own a Smartphone?

Base: Regular and Infrequent Riders

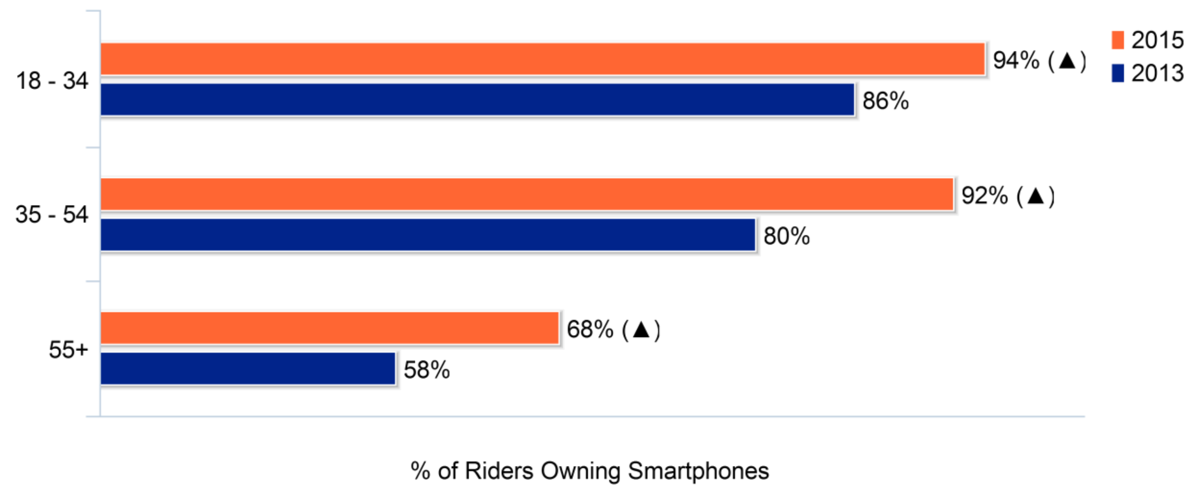
	2012	2013	2014	2015
n	1,218	1,395	1,102	1,025
n_w	1,218	1,395	1,161	1,025

▲ / ▼ indicates a statistically significant change from previous year *Base: Regular and Infrequent Riders*

Smartphone ownership continues to be related to age and is significantly lower among older Riders.

Smartphone ownership has increased in all age groups.

Figure 42: Smartphone Ownership by Age

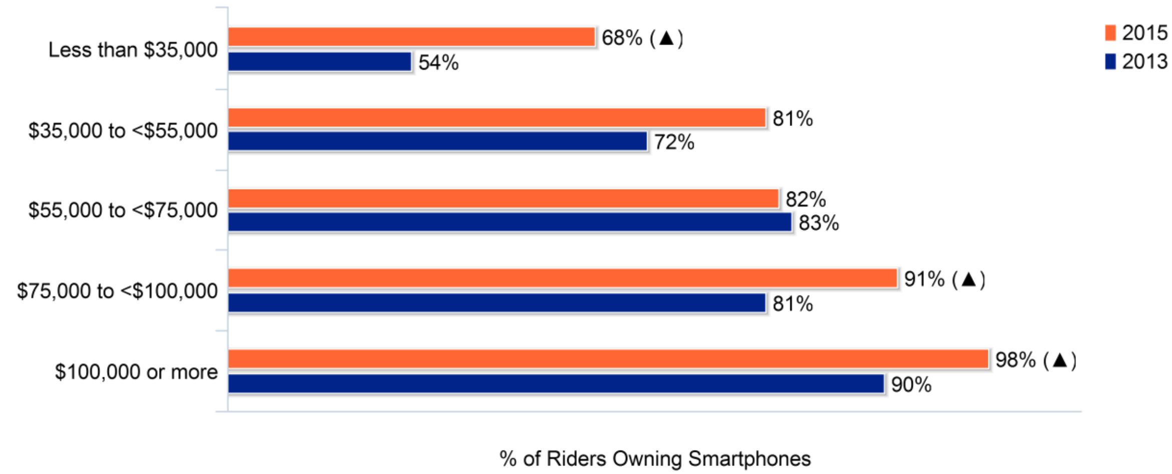


Smartphone ownership is also related to income.

- Notably, Riders with household incomes less than $35,000 are significantly less likely to own a Smartphone.

Smartphone ownership has increased among all but one income segments.

Figure 43: Smartphone Ownership by Income



Questions: IN4A Do you own a Smartphone?

Base: Regular and Infrequent Riders

	2013	2015
n	1,395	1,025
n_w	1,395	1,025

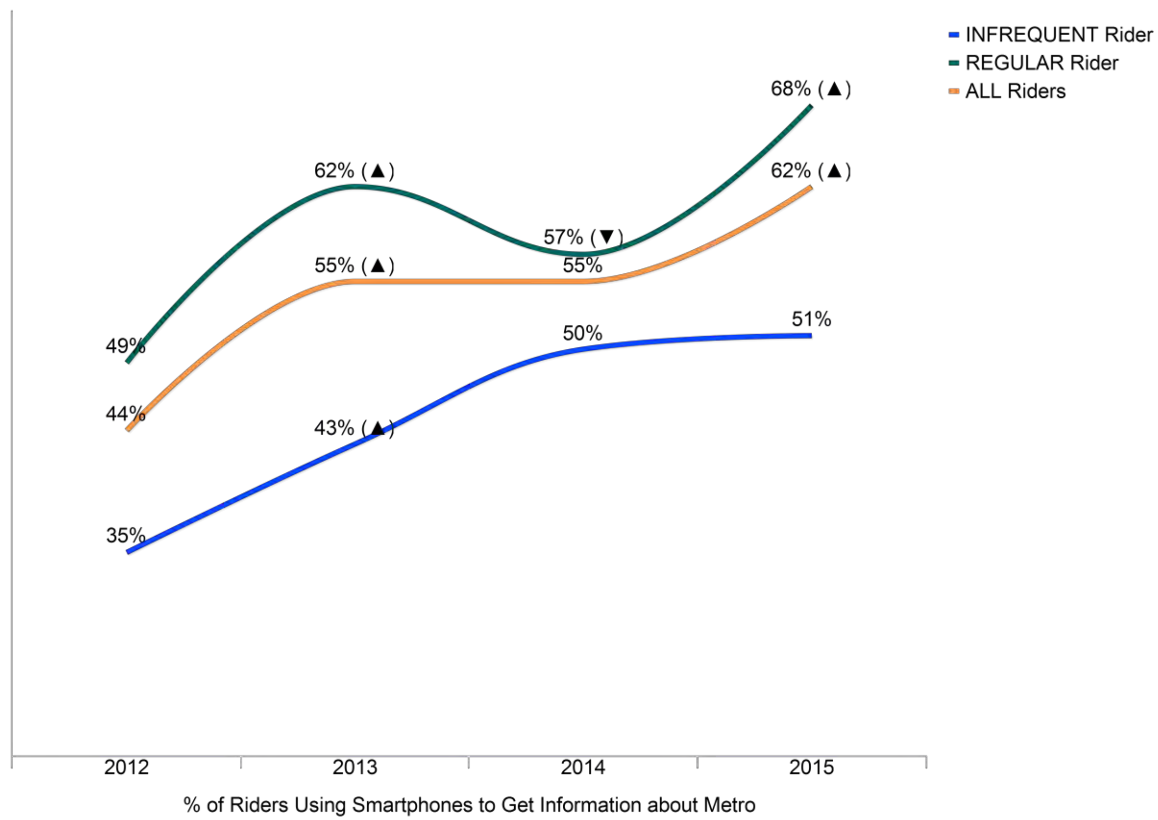
▲ / ▼ *indicates a statistically significant change from previous year*

Use as Source of Information about Metro

Three out of five Riders currently frequently or sometimes use Smartphones to get information about Metro, up significantly from the first year measured (2012). Frequency of using Smartphones has increased in all segments.

- Use of Smartphones decreased between 2013 and 2014 among Regular Riders but then rebounded in 2015. The decrease in 2014 may be due to the higher percentage of older Infrequent and Moderate Riders surveyed in 2014. Older people are slower to adopt new technologies and Moderate and Infrequent Riders were less likely to use Smartphones. Therefore, the drop in use of Smartphones for information may have dropped accordingly. The increase in 2015 is likely due to adoption of Smartphones for information about Metro among Riders as well as a general increase in the use of Smartphones across all Rider segments.
- Infrequent Riders' use of Smartphones has increased each year.

Figure 44: Frequency of Using Smartphones to Get Information about Metro



Questions: IN4A How often do you use a Smartphone to get information about Metro? % shown are those who said frequently or sometimes use

Base: Regular and Infrequent Riders

	2012	2013	2014	2015
n	1,218	1,395	1,102	1,025
n_w	1,218	1,395	1,161	1,025

▲ / ▼ *indicates a statistically significant change from previous year* Base: Regular and Infrequent Riders

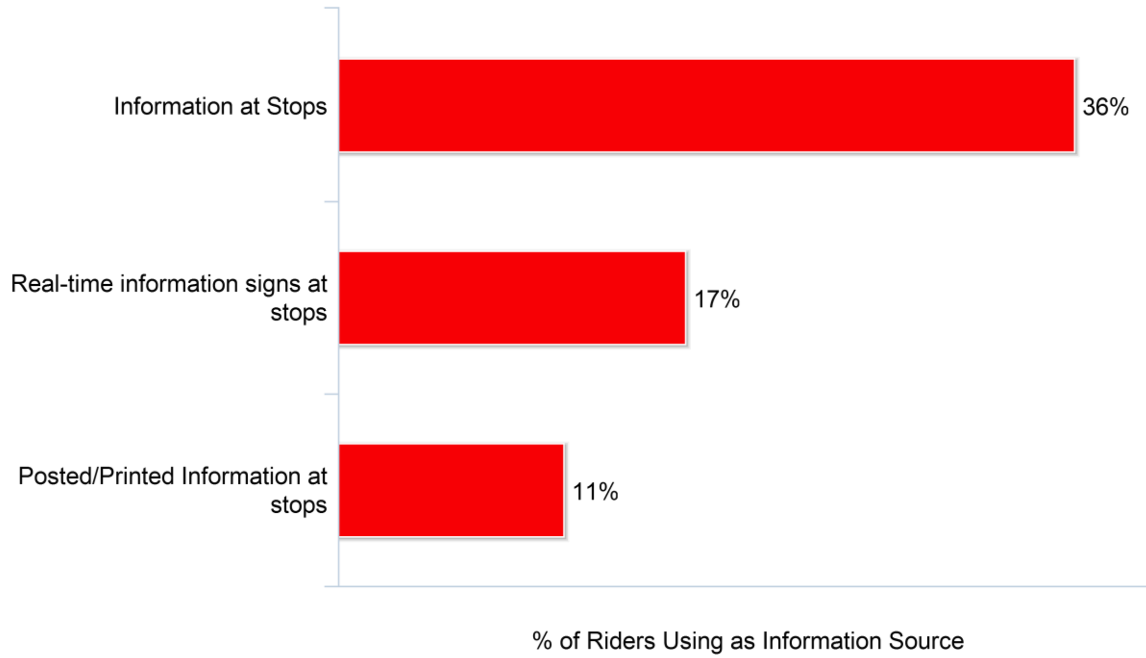
Information at Stops

Use of and Satisfaction with Posted and Real-Time Information at Stops

As noted (Figure 40), more than one out of three Riders use information at the bus stops.

Among those using information at stops, reported use of real-time information at stops is somewhat higher than posted / printed information. Because few stops have real-time information, there might have been a misunderstanding of the term.

Figure 45: Use of Posted and Real-Time Information at Stops



Questions: IN1 Which of the following do you use to get information about Metro? Multiple responses allowed.
Sum of real-time information at stops and posted / printed information at stops sums to less than total information at stops as some respondents did not specify a location

	n	*n_w*
Base: Regular and Infrequent Riders; Year 2015	*1,025*	*1,025*

Riders who were less than very satisfied with information at stops (58% of all Riders) were asked follow-up questions about printed and real-time information at stops.

Riders are less satisfied with the availability of real-time information at stops than with the availability of printed / posted information at stops.

Figure 46: Satisfaction with Printed / Posted Information at Stops

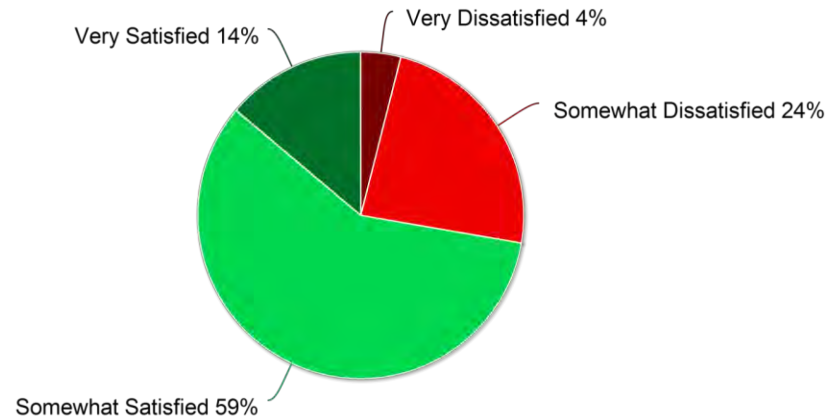
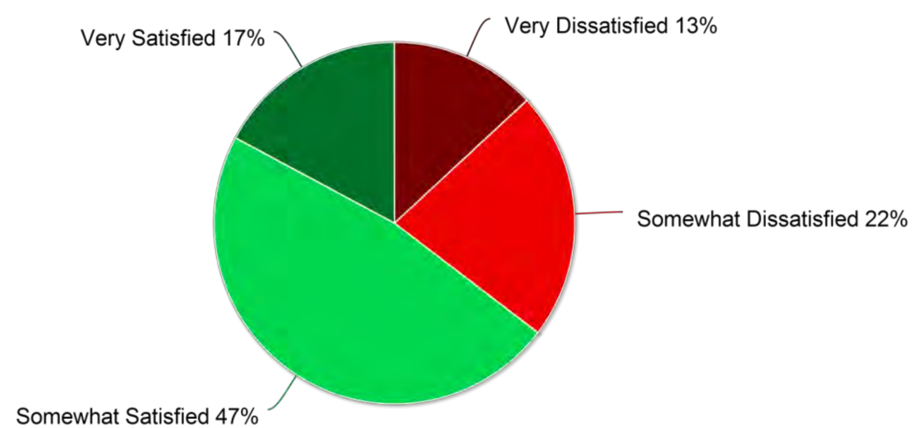


Figure 47: Satisfaction with Real-Time Information at Stops



Questions: IN3 Are you satisfied or dissatisfied with availability of printed information at stops / real-time information at stops?

	n	*n_w*
Base: Regular and Infrequent Rider Who Were Less than Very Satisfied with Information at Stops	*67*	*64*

Interest in Real-Time Travel Information

When asked what real time information they would like and how they would like to receive it, Riders indicate they are most interested in real-time arrival times and comparative travel times between routes and/or modes.

Those interested in real-time travel information prefer to get information at stops and on their Smartphones.

Figure 48: Interest in Different Types of Real-Time Travel Information

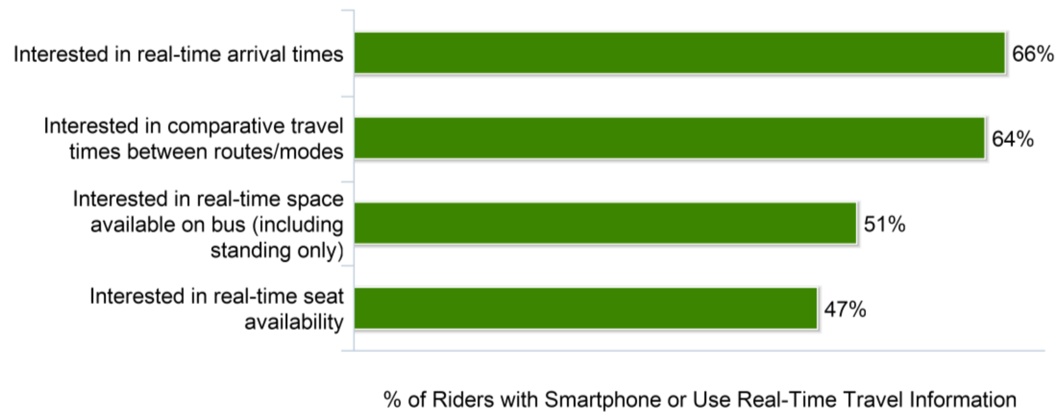
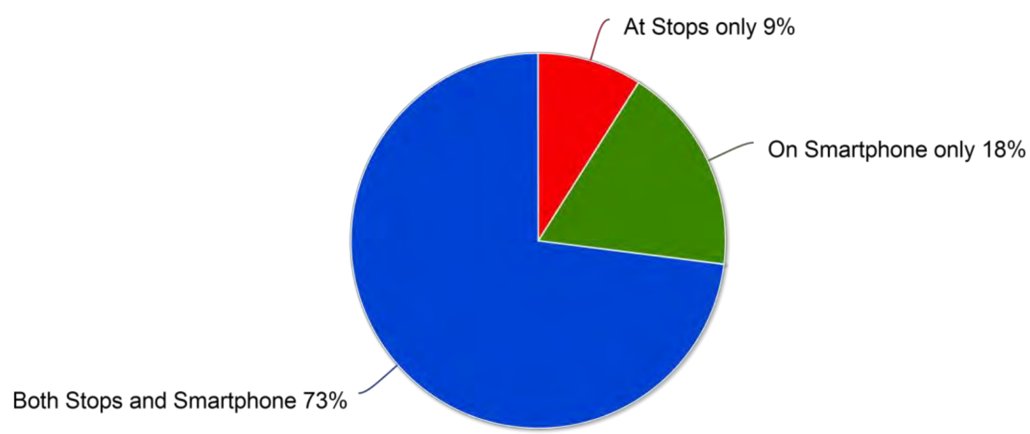


Figure 49: Preferred Means of Getting Real-Time Travel Information



Questions: IN5 Would you be interested in.. .? Multiple responses allowed.
IN5_2 Would you prefer to get real-time information at stops, on your smartphone, or both

	n	n_w
Base: Regular and Infrequent Riders Who Currently use Real-time Travel Information or Have a Smartphone	*826*	*879*

FINDINGS: OVERALL SATISFACTION WITH METRO

Summary

Topic	What We Found	What It Means
Overall Satisfaction	After increasing significantly in 2014, Riders' overall satisfaction with Metro decreased slightly. However, this decrease is not statistically significant. • The percentage very satisfied increased slightly but remains below the peak in 2011 when 50 percent of all Riders were very satisfied with riding Metro. Regular Riders' overall satisfaction is significantly higher than Infrequent Riders. • The percentage of "Very" Satisfied Regular Riders has increased steadily since 2013. The slight decrease in overall satisfaction noted in 2015 is due to a decrease in satisfaction among Infrequent Riders.	Metro is effective in meeting the general needs of its Regular Riders. Metro should continue to focus on service improvements to further enhance Regular Riders' customer experience, with a goal of building the percentage of "very" satisfied Riders. While a relatively small segment, Metro should investigate further the decreased satisfaction among Infrequent Riders.

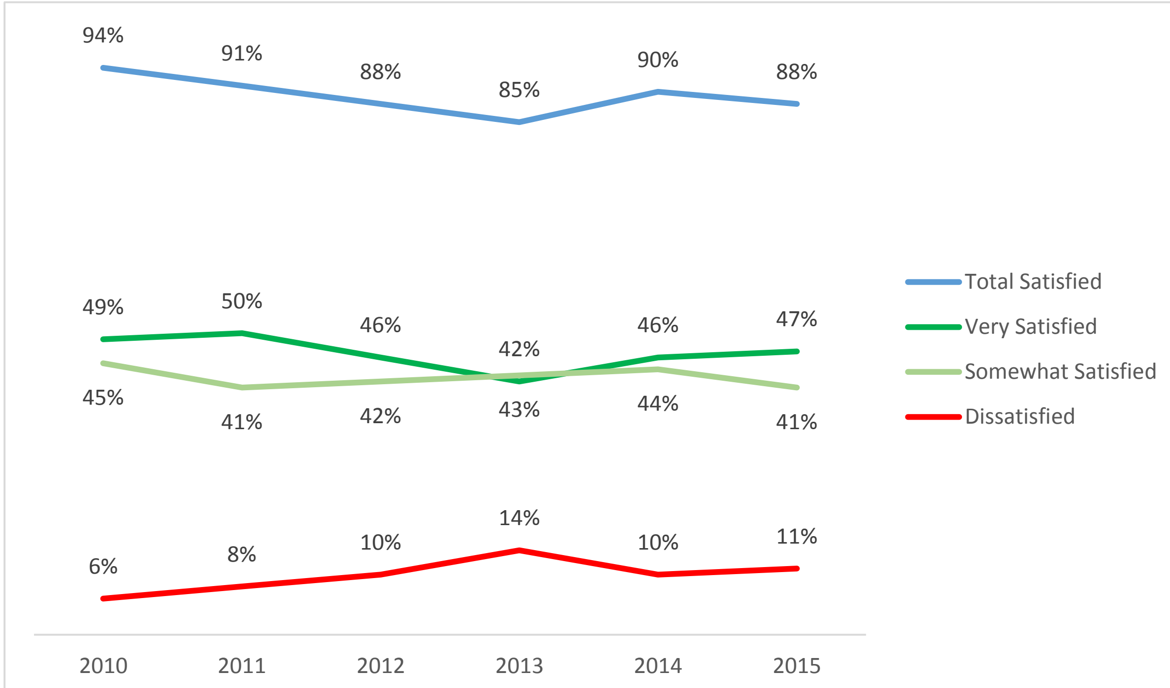
2013	2014	2015
	ALL RIDERS TOTAL SATISFIED	
85%	90%▲	88%
	VERY SATISFIED	
42%	46%▲	47%
	DISSATISFIED	
14%	10%▼	11%
	REGULAR RIDERS TOTAL SATISFIED	
88%	88%	90%
	VERY SATISFIED	
44%	47%	49%
	DISSATISFIED	
12%	11%	10%
	INFREQUENT RIDERS TOTAL SATISFIED	
80%	91%▲	85%
	VERY SATISFIED	
42%	49%▲	43%
	DISSATISFIED	
20%	8%▼	15%▲

Overall Satisfaction

After increasing significantly in 2014 and reversing the downward trend first noted in 2011, overall satisfaction with Metro decreased slightly. However, this decrease is not statistically significant.

- More Riders are "very" as opposed to "somewhat" satisfied. Moreover, the percentage of "very satisfied" Riders has increased since 2013 but remains below 2010 and 2011 levels.

Figure 50: Trends in Overall Satisfaction



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

	2010	2011	2012	2013	2014	2015
n	1,140	1,455	1,218	1,395	1,102	1,025
n_w	1,140	1,455	1,218	1,395	1,161	1,025

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

Overall Satisfaction by Frequency of Riding

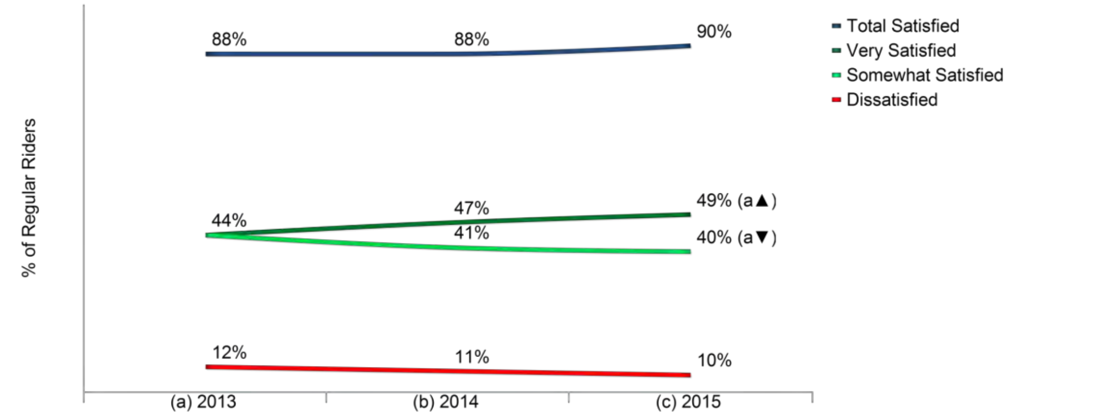
Nine out of ten Regular Riders are satisfied with Metro.

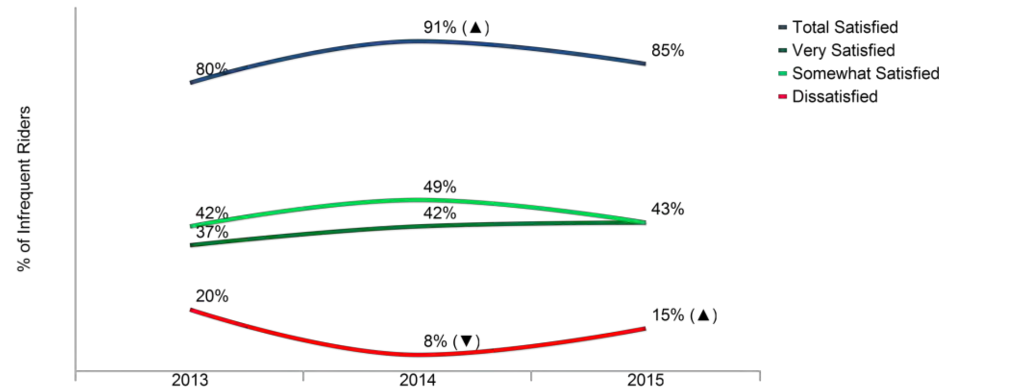
- The percentage "very" satisfied has been increasing steadily since 2013. However, it remains below the peak in 2011 (54%).

The changes in overall satisfaction over the past several years are due almost entirely to changes among Infrequent Riders.

- The increase in overall satisfaction among Infrequent Riders between 2013 and 2014 was due to an increase in the percentages of both "very" and "somewhat" satisfied.
- The decrease in overall satisfaction between 2014 and 2015 is due to a decrease in the percentage "somewhat" satisfied and a significant increase in the percentage "dissatisfied."
- The percentage "very" satisfied continued to increase although not significantly.

Table 17: Trends in Overall Satisfaction by Frequency of Riding





Question: GW1A Overall, would you say you are satisfied or dissatisfied with Metro? Would that be very or somewhat [satisfied / dissatisfied]?

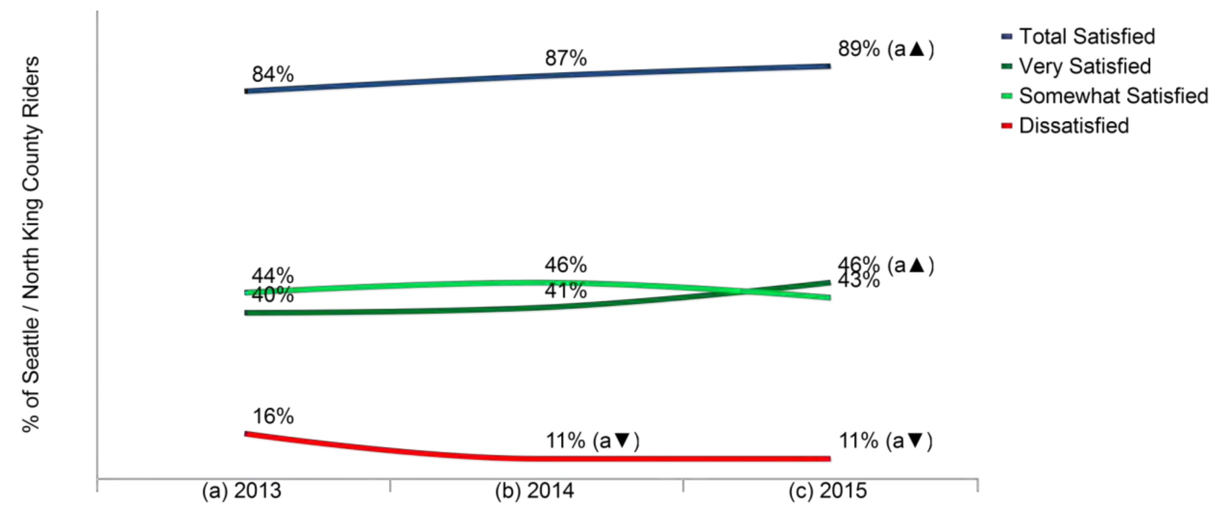
	Base: Regular Riders			Base: Infrequent Riders		
	2013	*2014*	*2015*	*2013*	*2014*	*2015*
n	*1207*	*861*	*922*	*188*	*241*	*103*
n_w	*567*	*719*	*412*	*324*	*442*	*219*

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

Overall Satisfaction by Area of Residence

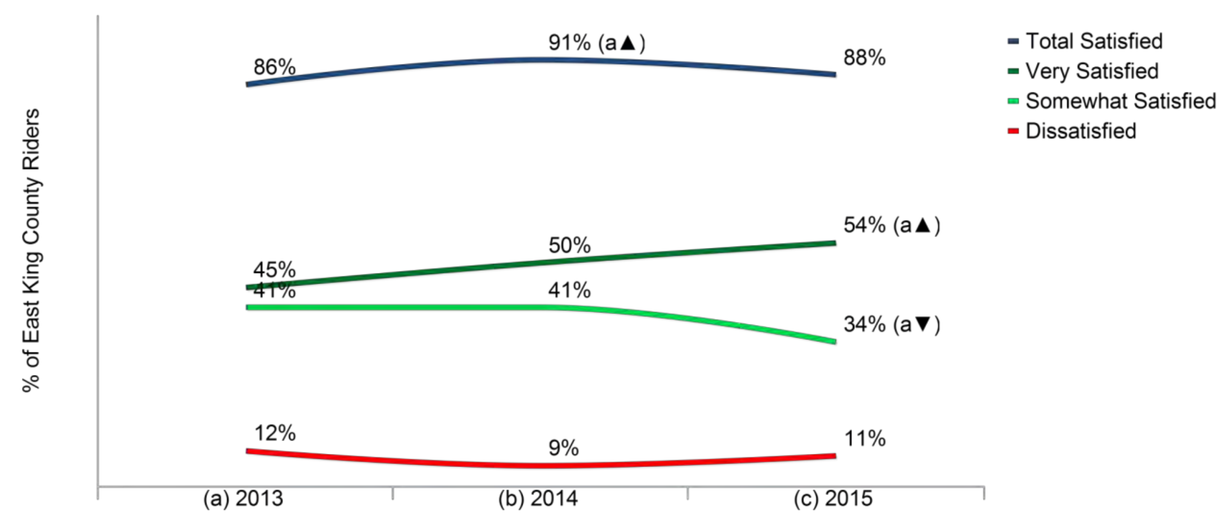
The percentage of Satisfied Riders in Seattle / North King County has increased since 2013. However, it remains below the peak in 2010 (94%) and 2011 (92%).

Figure 51: Trends in Overall Satisfaction by Area of Residence

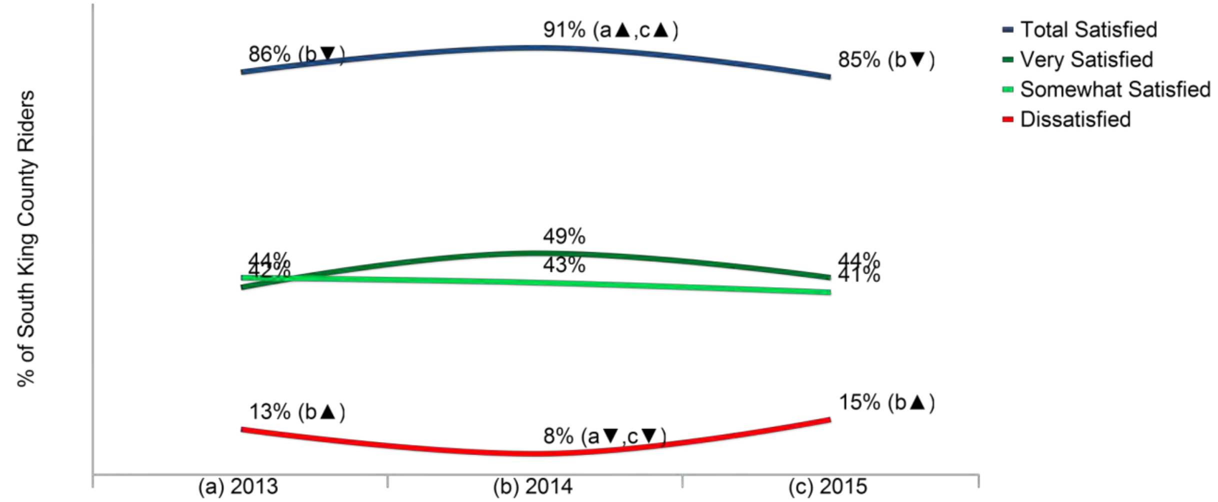


While the percentage of Satisfied Riders in East King County dropped slightly in 2015, the percentage of "very satisfied" Riders has been increasing steadily since 2013 and is now at the highest recorded levels.

East King County has the highest percentage of "very satisfied" Riders.



After increasing between 2013 and 2014, satisfaction decreased among South King County Riders in 2015. This decrease is due to a significant increase in the percentage of "dissatisfied" Riders.



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

	Base: Seattle / North King			Base: South King			Base: East King		
	2013	*2014*	*2015*	*2013*	*2014*	*2015*	*2013*	*2014*	*2015*
n	*509*	*540*	*472*	*442*	*273*	*269*	*444*	*289*	*284*
n_w	*730*	*619*	*641*	*428*	*293*	*190*	*238*	*251*	*193*

▲ / ▼ indicates a statistically significant change from previous year

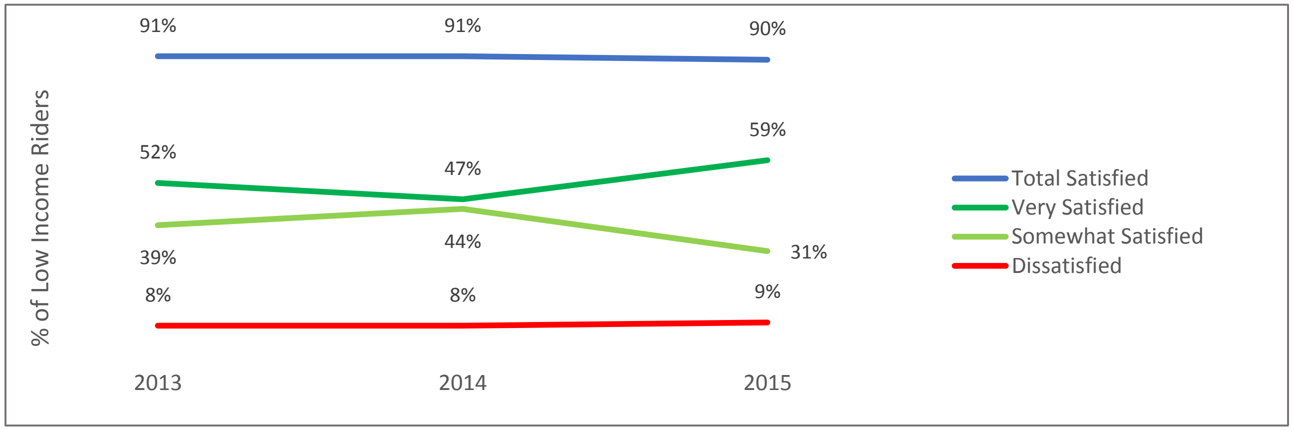
Overall Satisfaction by Income

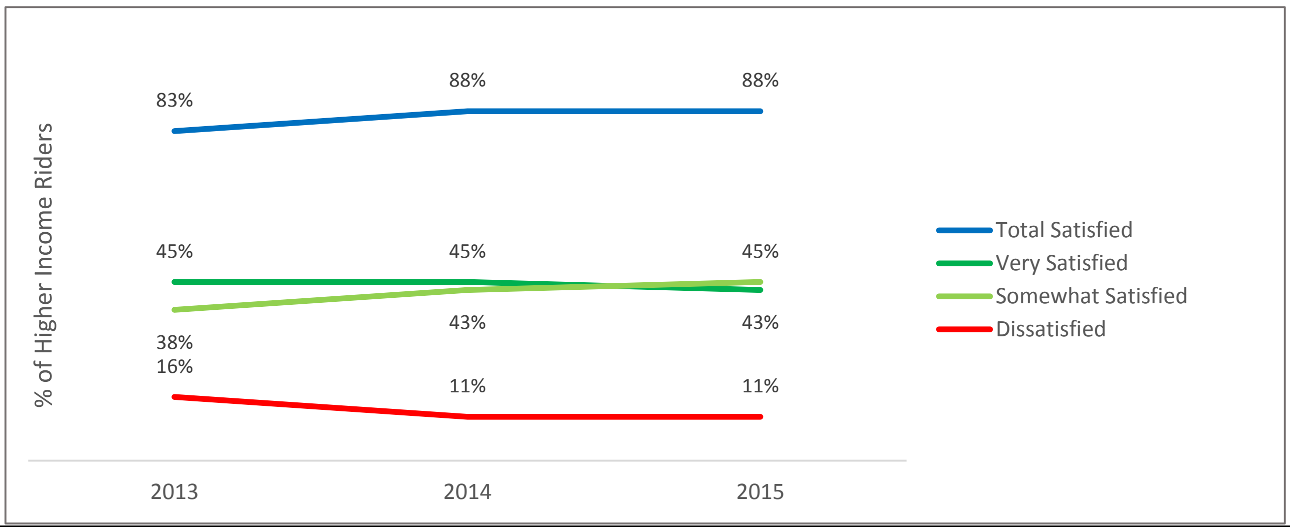
While there are no differences in overall satisfaction between Low- and Higher-income Riders, Low-Income Riders are more likely than Higher-Income Riders to be "very satisfied" with riding Metro.

Moreover, the percentage of "very satisfied" Low-Income Riders increased significantly in 2015.

The percentage of "very satisfied" Higher-Income Riders has also been increasing.

Figure 52: Trends in Overall Satisfaction by Income





Question: GW1A Overall, would you say you are satisfied or dissatisfied with Metro? Would that be very or somewhat [satisfied / dissatisfied]?

	Base: Low Income Riders			Base: Higher Income Riders		
	2013	*2014*	*2015*	*2013*	*2014*	*2015*
n	*386*	*323*	*209*	*809*	*690*	*721*
n_w	*326*	*345*	*203*	*888*	*729*	*744*

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

FINDINGS: SERVICE QUALITY

Summary

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Satisfaction with Overall Service Dimensions</td>
<td>
Individual service elements are grouped into nine dimensions of service; an overall rating for each dimension is computed as the average satisfaction ratings for each major response category (very satisfied, somewhat satisfied, dissatisfied) across all elements of service within each dimension.
Riders continue to be most satisfied with the fare payment system and Metro operators. They are least satisfied with comfort and cleanliness both onboard and at stops and transferring.
Consistent with the trend in overall satisfaction, the percentage of Riders “very” satisfied with each of the nine primary Service Dimensions was relatively stable. However, there were some significant increases for:

Metro operators,
Park-and-ride lots,
Level of service, and
Transferring.

</td>
<td>
<table>
<tr><th></th><th colspan="2">% VERY SATISFIED</th></tr>
<tr><th></th><th>2014</th><th>2015</th></tr>
<tr><td>FARE PAYMENT</td><td>81%</td><td>77%</td></tr>
<tr><td>METRO OPERATORS</td><td>63%</td><td>73% ▲</td></tr>
<tr><td>INFORMATION SOURCES</td><td>60%</td><td>58%</td></tr>
<tr><td>PERSONAL SAFETY</td><td>50%</td><td>48%</td></tr>
<tr><td>PARK-AND-RIDE LOTS</td><td>40%</td><td>48% ▲</td></tr>
<tr><td>LEVEL OF SERVICE (LOS)</td><td>41%</td><td>46% ▲</td></tr>
<tr><td>TRANSFERRING</td><td>30%</td><td>35% ▲</td></tr>
<tr><td>ONBOARD: COMFORT/ CLEANLINESS</td><td>38%</td><td>35%</td></tr>
<tr><td>STOPS: COMFORT / CLEANLINESS</td><td>35%</td><td>32%</td></tr>
</table>
Significant change (▲) or (▼) from previous year
</td>
<td>
Recent changes to service, notably in Seattle, may have contributed to the increases in satisfaction with the level of service provided and transferring. Efforts should continue in these areas and are discussed further in the Key Drivers analysis.
Metro operators continue to be a major asset and the improvements should be communicated.
</td>
</tr>
</table>

Topic	What We Found	What It Means

Topic: **Highest Rated Elements of Service (50%+ Very Satisfied)**

What We Found

Eighteen of the 42 service elements rated achieved satisfaction ratings above 50% very satisfied. With the exception of personal safety at park-and-ride lots, all were above 50% in 2014 as well. Ratings for this element of service increased significantly from 2014.

As noted above, satisfaction with the Level of Service Dimension increased. This is due in part to a significant increase in satisfaction with the distance from home to stop.

Satisfaction with Metro operators also increased significantly due to increases in satisfaction with safe vehicle operation, effectiveness of handling problems, and the addition of a new element, courtesy, which is highly rated. Despite the increase in satisfaction with how well drivers handle problems on the bus, Rider satisfaction with safety onboard during the daytime decreased.

While Riders continue to be very satisfied with availability of information, satisfaction with availability of information online decreased (after a significant increase between 2013 and 2014).

	% VERY SATISFIED	
	2014	2015
FARE: ORCA Cards	87%	83%▼
DRIVERS: Operate Vehicles Safely	74%	82%▲
FARE: Ease of Paying When Boarding	81%	80%
DRIVERS: Courtesy	N/A	76%
FARE: Ease of Loading Pass on ORCA	76%	72%
DRIVERS: Handle Problems Effectively	55%	69%▲
DRIVERS: Helpfulness	66%	68%
DRIVERS: Stop / Stop Smoothly	N/A	66%
LEVEL OF SERVICE: Distance from Home to Stop	52%	63%▲
SAFETY: Daytime at Stops	70%	63%
INFO: Overall Ability to Obtain	63%	62%
INFO: Availability Online	71%	61%▼
INFO: Availability Via Smartphone	N/A	60%
FARE: Ease of Adding Value to E-Purse	68%	60%▼
FARE: Value of Service for Fare Paid	62%	59%
P&R LOTS: Personal Safety	46%	55%▲
SAFETY: Onboard Daytime	59%	53%▼
SAFETY: Transit Tunnel	51%	51%

▲ / ▼ *indicates significant (95%) change from previous year*
▲ / ▼ *indicates significant (90%) change from previous year*

What It Means

While ORCA Card use continues to slowly increase, satisfaction with ORCA overall and specifically with the ease of adding value to an E-Purse is down. A greater understanding of what makes up the ease of adding value (e.g., easy access to locations to add value or ease of the actual process) could provide additional insights into how to improve satisfaction with ORCA.

Metro should continue to focus on providing quality and accurate information. Online sources should be a priority.

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Below-Average Ratings (40–49% Very Satisfied)</td>
<td>Most elements of service in this category of below-average satisfaction were in this same category of service in 2013 and 2014.

Satisfaction with frequency of service increased significantly, moving from the lowest group of ratings (<40%) to near the highest group of ratings (50%+).

Satisfaction with number of transfers also increased, prompting its move from the lowest group of ratings to this tier or satisfaction.</td>
<td>
<table>
<tr><th></th><th colspan="2">% VERY SATISFIED</th></tr>
<tr><th></th><th>2014</th><th>2015</th></tr>
<tr><td>LEVEL OF SERVICE: Frequency of service</td><td>36%</td><td>47% ▲</td></tr>
<tr><td>ONBOARD: Inside cleanliness</td><td>47%</td><td>45%</td></tr>
<tr><td>P&R LOTS: Parking availability</td><td>34%</td><td>45% ▲</td></tr>
<tr><td>LEVEL OF SERVICE: Availability of service</td><td>40%</td><td>44%</td></tr>
<tr><td>LEVEL OF SERVICE: On-time performance</td><td>41%</td><td>43%</td></tr>
<tr><td>ONBOARD: Ease of loading / unloaded crowding at stops</td><td>45%</td><td>43%</td></tr>
<tr><td>P&R LOTS: Vehicle security</td><td>40%</td><td>43%</td></tr>
<tr><td>LEVEL OF SERVICE: Travel time</td><td>41%</td><td>41%</td></tr>
<tr><td>TRANSFER: Number of</td><td>35%</td><td>41% ▲</td></tr>
<tr><td>INFO: Availability of information at stops</td><td>45%</td><td>41%</td></tr>
<tr><td>INFO: Notification of service changes</td><td>N/A</td><td>41%</td></tr>
</table>
</td>
<td>Metro should continue to focus on increased frequency of service with the goal to move this into the top satisfaction tier.

The increase in satisfaction with number of transfers is somewhat surprising as the percentage of Riders whose primary trip requires a transfer increased. The increase in satisfaction could be due to other factors such as better access to service and more frequent service.</td>
</tr>
</table>

Topic	What We Found	What It Means
Lowest Rated Elements of Service (<40% Very Satisfied)	Overcrowding on buses—both general overcrowding and the ease of loading and unloading due to crowding on the vehicle—continues to be areas where Riders express low levels of satisfaction. In addition, satisfaction with the availability of seating on buses decreased significantly. After increasing significantly between 2013 and 2014, satisfaction with onboard safety after dark held steady. Satisfaction with safety while waiting after dark increased significantly. Two aspects of information were measured for the first time in 2015 and received relatively low ratings: ability to provide feedback and website postings of delays or problems.	While the past years have seen improvements in satisfaction with safety after dark, Metro should continue to focus its efforts in this area. The issues of overcrowding are difficult to address without additional service. However, communications with Riders about loading, managing personal possessions, etc. can mitigate some of the problems.

	% VERY SATISFIED	
	2014	**2015**
INFO: Website postings of delays / problems	N/A	39%
SAFETY: Onboard after dark	37%	36%
ONBOARD: Ease of loading / unloaded crowding on vehicle	36%	35%
STOPS: Cleanliness of stops / shelters	41%	35% ▼
INFO: Ability to provide feedback	N/A	35%
SAFETY: Waiting after dark	28%	34% ▲
STOPS: Availability of shelters	35%	32%
ONBOARD: Availability of seating	40%	30% ▼
TRANSFER: Wait time	26%	30%
STOPS: Availability of seating	29%	27%
TRANSFER: Scheduling	N/A	27%
STOPS: Protection from weather	N/A	26%
ONBOARD: Overcrowding	21%	20%

Key Drivers Analysis

This survey asked riders about their satisfaction with 42 service elements. Statistical analysis was used to group these service elements into nine Overall Service Dimensions, and to identify the importance of these Dimensions and the individual service elements in determining Rider satisfaction with and expectations of Metro. This summary table is ordered based on the importance of the Overall Service Dimension followed by the importance of the elements of service.

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

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

Personal Safety is the second most important service dimension.

- Safety after Dark remains an area of concern.

Comfort and Cleanliness Onboard is the third most important service dimension and is more important than comfort and cleanliness at stops.

- All elements of service within the Comfort and Cleanliness Onboard

High Importance / Below-Average Satisfaction: Improve		
	Importance Rank	**% Very Satisfied**
Level of Service (LOS)		
• Travel time	1	41%
• Availability	2	44%
• On-time	3	43%
Personal Safety		
• Onboard: Dark	2	36%
• Waiting: Dark	3	34%
Comfort and Cleanliness Onboard		
• Cleanliness	1	45%
• Loading at stops	2	43%
• Crowding	3	20%
Park-and-Ride Lots		
• Vehicle security	2	43%
Transferring		
• Number of transfers	1	41%
Information		
• Provide feedback	1	35%
Comfort and Cleanliness at Stops		
• Weather protection	1	26%
• Shelters	2	32%
Lower Importance / Below-Average Satisfaction: Strategically Target		
Level of Service		
• Frequency of service	5	47%
Comfort and Cleanliness Onboard		
• Loading onboard	4	35%
• Availability of seating	5	30%
Park-and-Ride Lots		
• Parking Availability	3	45%
Transferring		
• Scheduling	2	27%
• Wait Time	3	30%
Information		
• About service changes	3	41%
• At stops	4	41%
Comfort and Cleanliness at Stops		
• Cleanliness	3	35%
• Availability of seating	4	27%

While satisfaction with level of service increased, the overall importance of this dimension relative to all other service dimensions cannot be under-estimated.

- The focus should be on travel time and availability of service to major destinations.

While satisfaction with waiting after dark improved, Metro should continue to focus on ensuring Rider safety after dark. In addition, daytime safety should not be ignored as satisfaction decreased.

Crowding onboard and while loading at stops continues to be a major issue. While crowding is a long-term issue that is not easily solved, improved cleanliness onboard may be an easier fix.

The importance placed on providing feedback indicates the extent to which Riders are engaged. It is important to note that this is a new element of service measured this year. The low ratings may suggest they do not know how to provide feedback and/or they feel that their feedback is not heard.

	Dimension are key drivers and all receive below-average ratings.		

Overview of Service Quality Analysis

Factor analysis was originally used to identify nine primary dimensions of service that contain elements of service that correlate with these overall dimensions. The dimensions represent the broad categories on which Riders evaluate quality of service. The nine dimensions and the elements of service included in each dimension for 2015 are illustrated below.

Dimension	Elements of Service Included	
Level of Service	Frequency of Service On-Time Performance Availability of Service (where you need to travel)	Travel Time Distance from Home to Stop
Transferring	Number of Transfers Wait Time when Transferring	Scheduling of Connections
Comfort and Cleanliness Onboard	Inside Cleanliness Availability of Seating Overcrowding	Ease of Loading / Unloading due to crowding at stops (moved from comfort/cleanliness at stops dimension) Ease of Loading / Unloading due to crowding on-board
Comfort and Cleanliness at Stops	Cleanliness of Shelters and Stops Availability of Seating (at shelters and stops)	Availability of Shelters Stops Protection from Weather (new)
Personal Safety	Daytime Safety Onboard Daytime Safety at Stops Onboard Safety after Dark	Safety at Stops after Dark Safety in Downtown Transit Tunnel
Metro Drivers	Helpfulness (with route and stop information) Courtesy Effectively Handle Problems (on vehicles)	Operate Vehicles Safely Start / Stop Vehicles Smoothly
Fare Payment	Ease of Paying Fares when Boarding Overall Satisfaction with ORCA Card Ease of Loading a Pass on ORCA Card	Ease of Adding Value to E-Purse Value of Service for Fare Paid
Information Sources	Overall Ability to Get Information Availability of Information Online Availability of Information at Stops Ability to get information via Smartphone	Notification of service changes Website posting of delays / problems Ability to provide feedback (new)
Park-and-Ride Lots	Personal Safety at Park-and-Ride Lots Security of Vehicles at Park-and-Ride Lots	Availability of Parking

For the report, analysis of service quality consists of three stages:

1. A summary of the results for 2015, overall and for key subgroups (rider status and where appropriate area of residence)
2. A review of changes in ratings between 2014 and 2015
3. Key Drivers Analysis to identify priorities for improvements

Key Drivers Analysis is used to derive the importance of the individual elements of service. Derived importance measures are calculated through statistically testing the influence of the individual elements of service on overall satisfaction with and expectations of Metro. Derived importance can help provide further understanding of the underlying factors driving overall customer satisfaction and perceptions that a respondent may not explicitly state.

For this analysis, individual service elements were modeled as predictors that influence overall satisfaction with and expectations of Metro. A weighted index of overall satisfaction with and rider expectations of Metro was developed to serve as the dependent variable. A multiple regression model was used to estimate the derived importance coefficients, with larger coefficients having a greater influence on overall satisfaction.

The analysis is done initially to determine which of the overall dimensions of service contribute to customers' overall satisfaction with and expectations of Metro. Subsequent analysis then looks at the extent to which the individual elements of service within each overall dimension contribute to customers' overall satisfaction with and expectations of Metro. Thus, an individual element of service may be a key driver when the overall dimension is not or vice versa.

Overall dimensions and the individual elements of service are then placed into one of four quadrants and corresponding strategies:

High Importance / Below-Average Satisfaction** Improve existing levels of service	**High Importance / Above-Average Satisfaction*** Maintain existing levels of service
Low Importance / Below-Average Satisfaction Strategically target	**Low Importance / Above-Average Satisfaction** Monitor

* *Above-average satisfaction percentage of "very satisfied" riders >=50%*

** *Below-average satisfied: percentage of "very satisfied" riders <50%*

Performance on Overall Service Dimensions

Ratings 2015

Overall satisfaction with each of the service dimensions was computed as the average satisfaction ratings for each major response category (very satisfied, somewhat satisfied, dissatisfied) across all elements of service within each dimension.

The majority of Riders are "very" or "somewhat satisfied" with all major service dimensions.

Riders are most satisfied (50% or more "very satisfied") with:

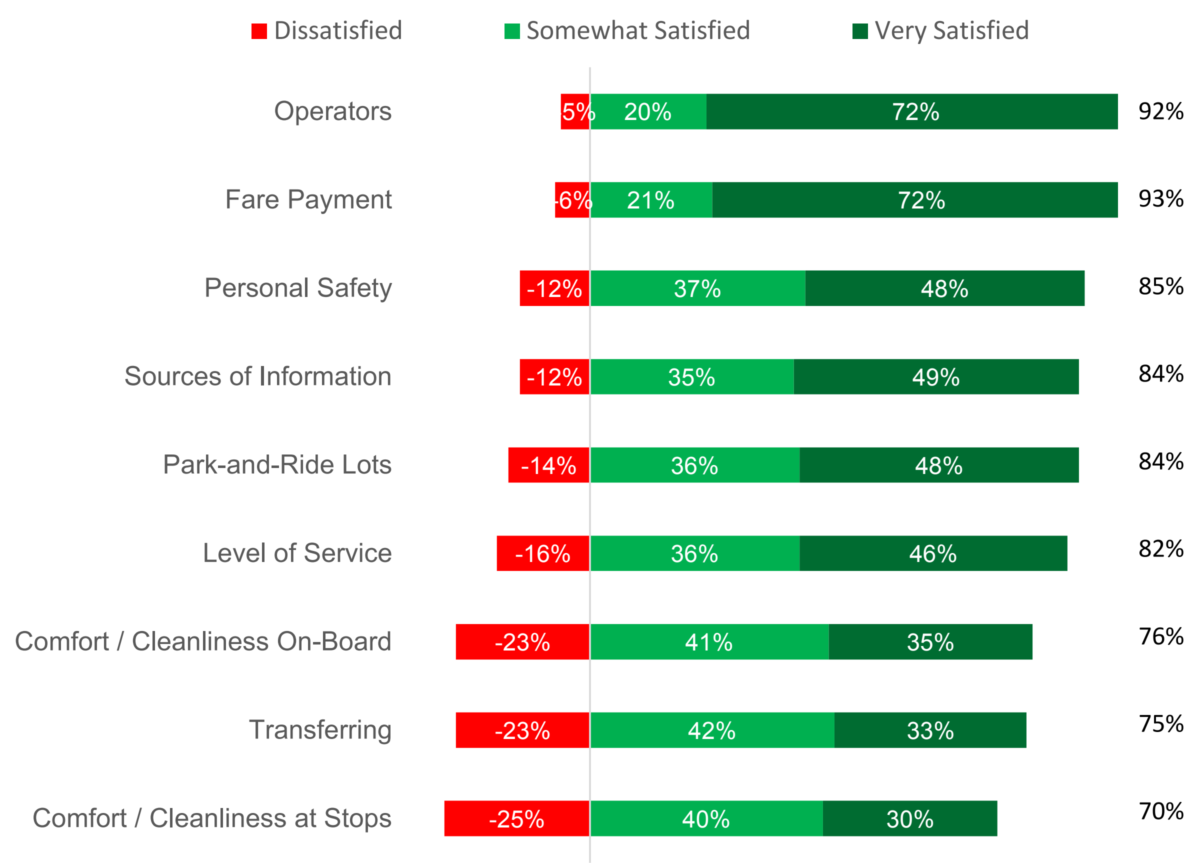
- Metro Operators
- Fare Payment

Riders are least satisfied (less than 40% very satisfied) with:

- Transferring
- Comfort and Cleanliness Onboard and at Stops

Riders continue to be more satisfied with comfort and cleanliness onboard than at stops.

Figure 53: Overall Service Dimensions: Ratings for Quality of Service 2015

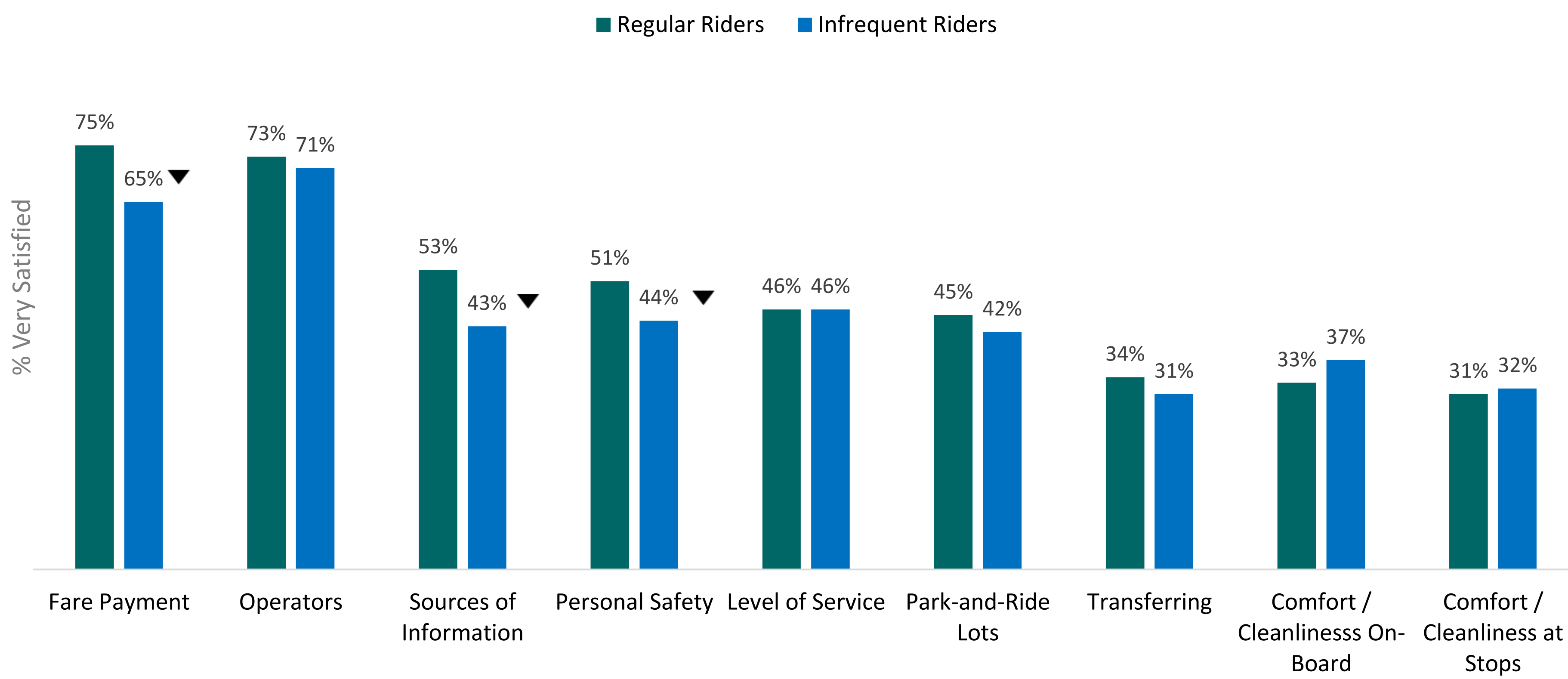


	n	n_w
Level of Service, Personal Safety, Fare Payment	1,025	1,025
Transferring (Rides Who Transfer)	460	461
Comfort / Cleanliness Stops / Onboard	353	534
Operators, Information Sources	493	491

Differences by Frequency of Riding (2015)

Consistent with their lower overall satisfaction ratings, Infrequent Riders are less satisfied with several of the overall service dimensions, notably fare payment, sources of information, and personal safety.

Figure 54: Differences in % Very Satisfied with Overall Dimensions of Service (2015) Regular and Infrequent Riders



Base: Regular and Infrequent Riders 2015

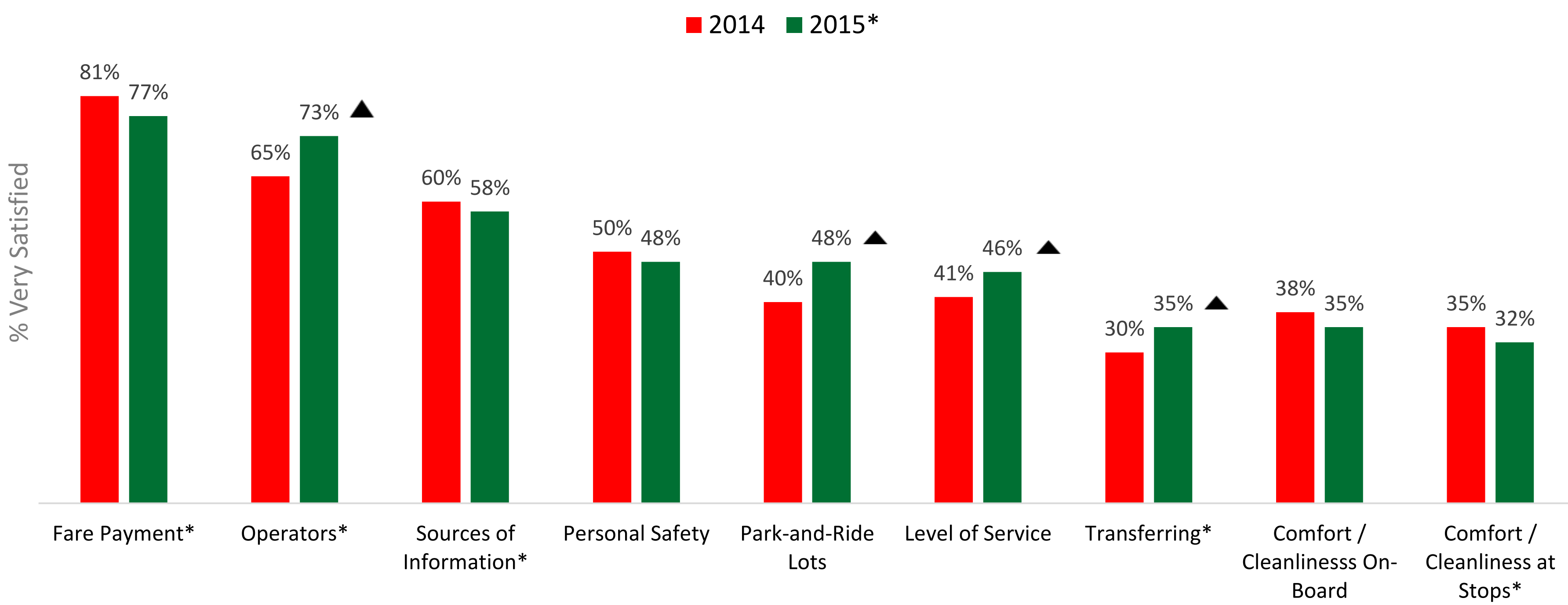
	Fare Payment		Operators		Sources of Information		Personal Safety		Level of Service		Transferring		Comfort / Cleanliness on Board		Comfort / Cleanliness at Stops	
	Regular Riders	Infreq. Riders	Regular Riders	Infreq. Riders	Regular Riders	Infreq. Riders	Regular Riders	Infreq. Riders	Regular Riders	Infreq. Riders	Regular Riders	Infreq. Riders	Regular Riders	Infreq. Riders	Regular Riders	Infreq. Riders
n	609	61	428	48	273	29	800	81	828	92	398	52	475	53	475	53
n_w	443	204	311	165	197	98	590	287	602	316	272	174	354	184	354	184

Changes in Ratings 2014–2015

Consistent with the stability of overall satisfaction, there were relatively small changes in the percentage of Riders "very" satisfied with the primary dimensions of service quality.

- Satisfaction with Metro Operators, Park-and-Ride Lots, Level of Service, and Transferring increased significantly.

*Figure 55: Overall Dimensions of Service Changes in Satisfaction Ratings 2014–2015**



* *2015 averages only contain those individual elements of service common to both 2014 and 2015. Therefore, 2015 averages presented here (Figure 55) may vary from the 2015 only (Figure 53) which includes all individual elements of service including those new in 2015.*

Base: Regular and Infrequent Riders

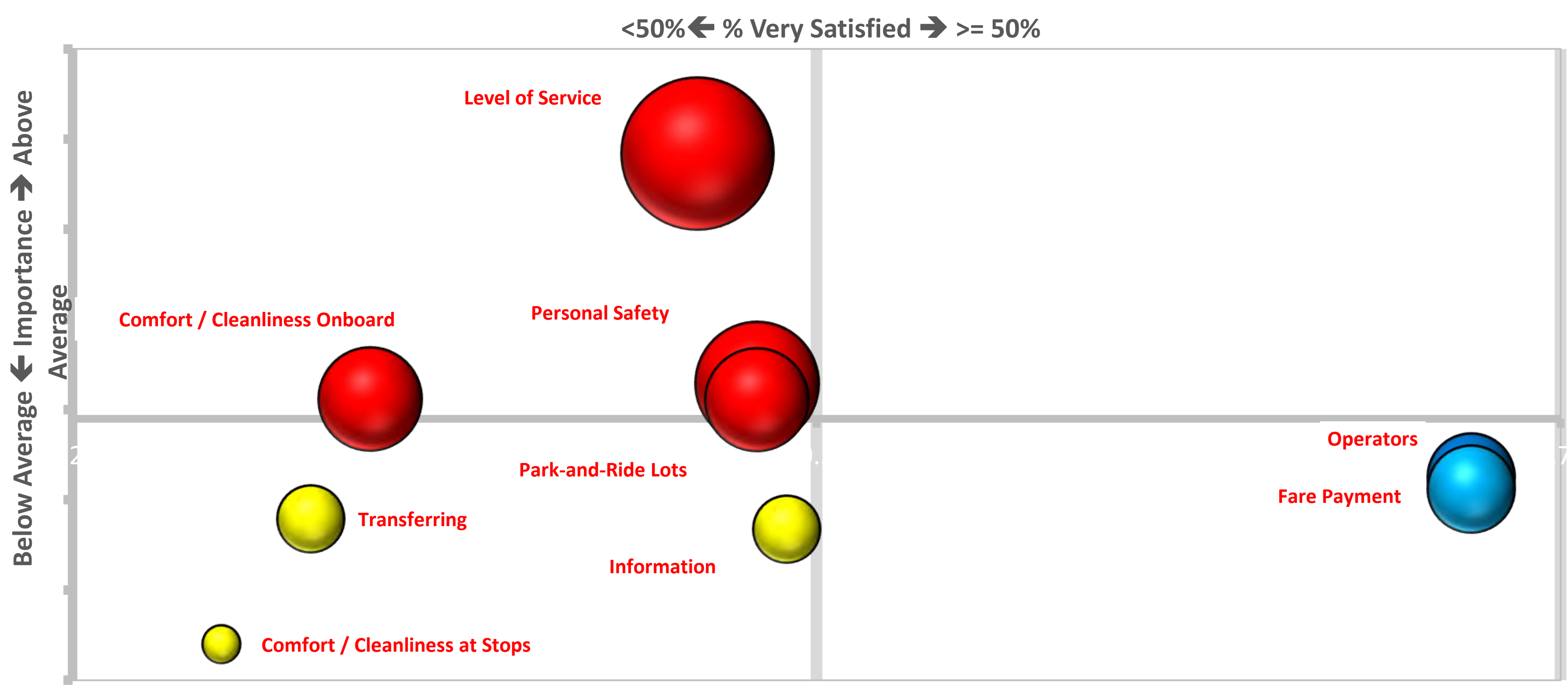
	Fare Payment		Operators		Sources of Information		Personal Safety		Level of Service		Transferring		Comfort / Cleanliness on Board		Comfort / Cleanliness at Stops	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
n	1,102	1,025	577	493	577	493	1,102	1,025	1,102	1,025	440	460	525	535	525	535
n_w	1,161	1,025	587	491	587	491	1,161	1,025	1,161	1,025	440	461	571	534	571	534

Key Drivers

Three areas are clearly identified as target areas for improvement.

- Level of service is by far the single largest driver of Riders' overall satisfaction with and perceptions of Metro. Satisfaction is somewhat below the target—46% compared to the cut point of greater than or equal to 50%.
- Personal safety is the second key driver and satisfaction is somewhat below the target, 48% compared to the cut point of greater than or equal to 50%.
- Comfort and cleanliness onboard is the third most important driver; this dimension has one of the lowest satisfaction rating (35%).

Figure 56: Key Drivers Overall Dimensions



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

Level of Service

Ratings 2015

More than four out of five (82%) Riders are currently satisfied with the Level of Service provided by Metro.

- Nearly half are very satisfied.

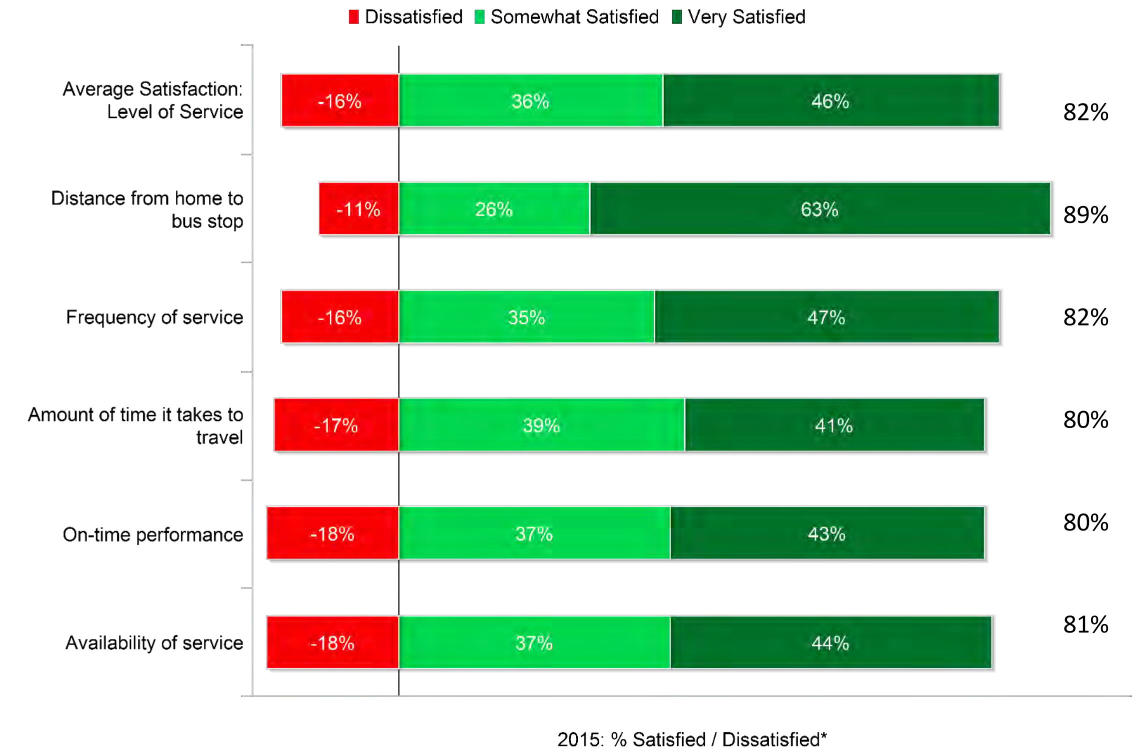
Overall satisfaction for the individual elements of service in this dimension are relatively consistent.

- Riders are most satisfied with distance from home to stop.
- However, with the exception of distance from home to stop, less than half of all Riders are “very” satisfied with the elements of service contained within this dimension.

While there are no differences in the overall percentage of “very” satisfied Regular and Infrequent Riders, Regular Riders are more likely than Infrequent Riders to be “very” satisfied with availability of service. On the other hand, Infrequent Riders are more likely to be “very” satisfied with frequency of service.

	% Very Satisfied	
	Regular Riders	Infrequent Riders
Overall Average	46%	46%
Distance to stop	62%	64%
Frequency of service	43%▼	54%▲
Travel time	44%	37%
On-time performance	41%	48%
Availability of service	49%▲	35%▼

Figure 57: Level of Service: Ratings for Quality of Service 2015



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?

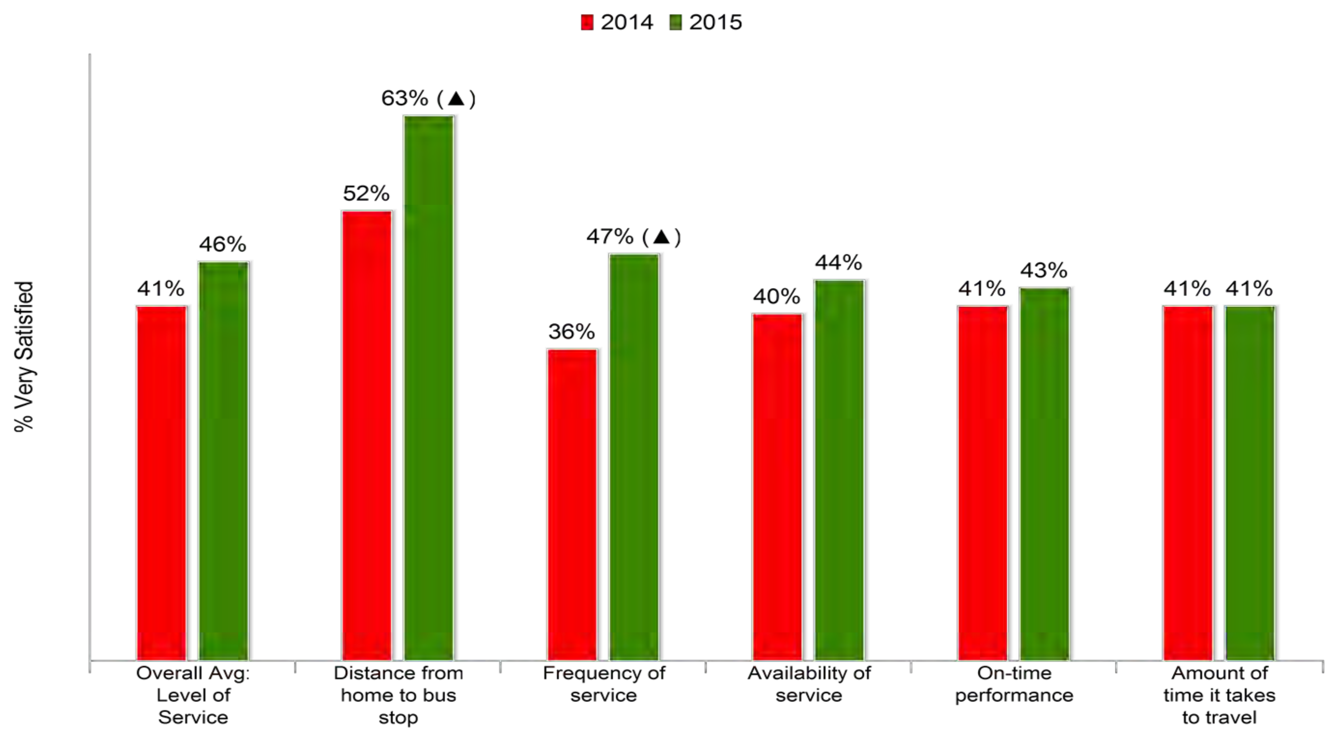
	Base: Regular and Infrequent Riders	
	n	*n_w*
2015	*1,025*	*1,025*

Changes in Ratings 2014–2015

Riders' satisfaction with Level of Service increased in 2015. This is noteworthy as the percentage of "Very Satisfied" Riders decreased between 2013 and 2014—from 50% to 41%, respectively. The increase in 2015 is significant for:

- Distance from home to stop
- Frequency of service

Figure 58: Level of Service: Changes in Ratings 2014–2015



Base: Regular & Infrequent Riders

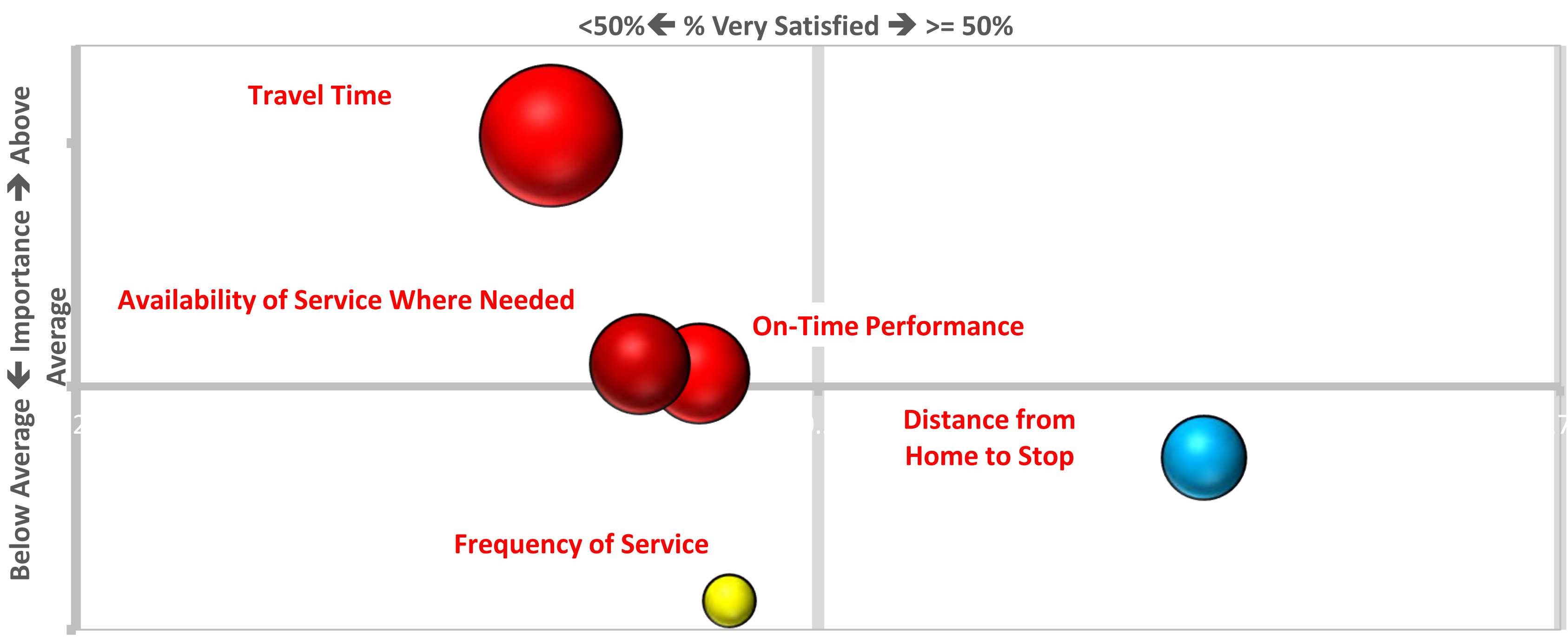
	2014	2015
n	*1,102*	*1,025*
n_w	*1,161*	*1,025*

Key Drivers Analysis

All five of the individual elements of service within the Level of Service dimension are key drivers of Riders' overall customer satisfaction with and perceptions of Metro.

- Travel time is the most significant driver of customer satisfaction and perceptions of Metro and receives the lowest percentage of "very" satisfied ratings (41%).

Figure 59: Key Drivers Level of Service



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

Transferring

Ratings 2015

Three out of four (75%) Riders are satisfied with transferring.

- However, Riders are more likely to be "somewhat" satisfied rather than "very" satisfied.

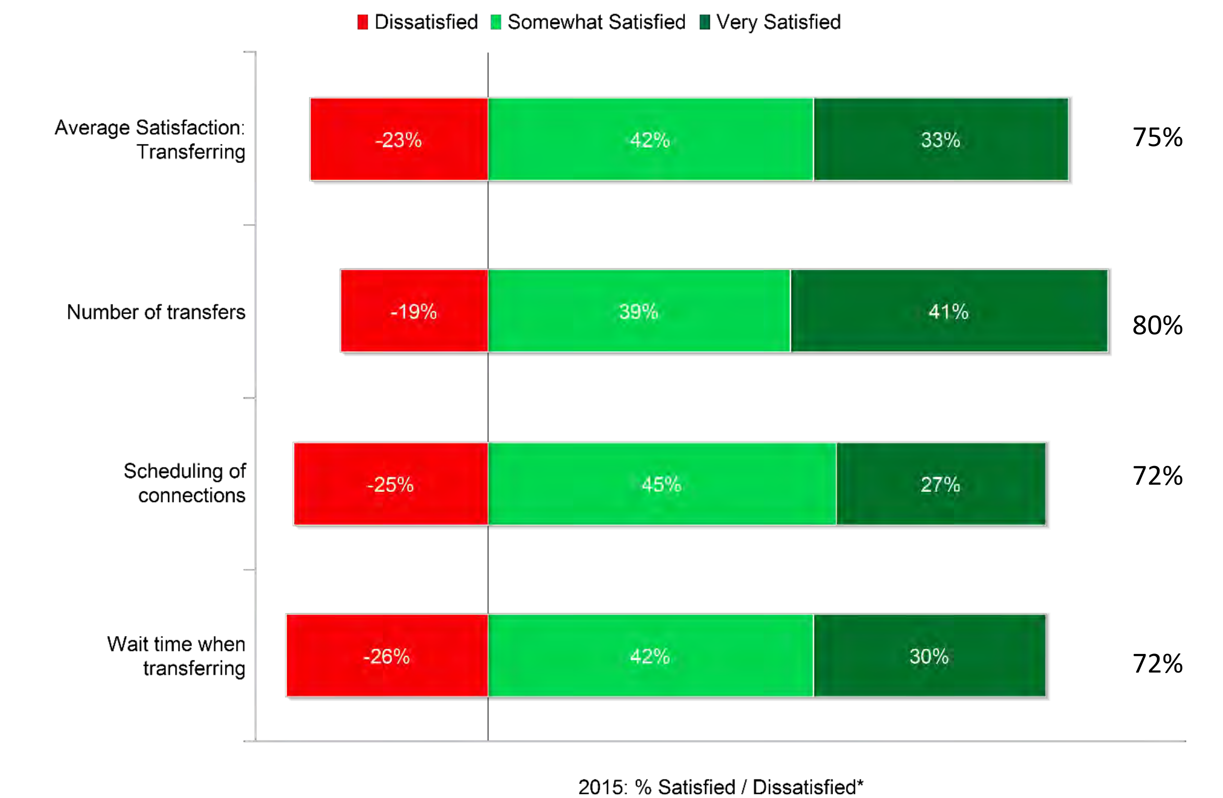
A greater percentage of Riders are very satisfied with the number of transfers compared to wait time when transferring and scheduling of connections.

There are no significant differences in satisfaction with transferring between Regular and Infrequent Riders.

There are differences by area of residence. Notably, while South King County Riders are somewhat less satisfied with number of transfers, they are significantly more satisfied with wait times when transferring

	% Very Satisfied		
	Seattle/ North	South King	East King
Overall average	33%	33%	32%
Number of transfers	42%	37%	41%
Scheduling of connections	29%	23%	26%
Wait time	27%	39% ▲▲	29%

Figure 60: Transferring: Ratings for Quality of Service 2014



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?

	Base: Regular and Infrequent Riders Who Transfer	
	n	*n_w*
2015	*460*	*461*

Changes in Ratings 2014–2015

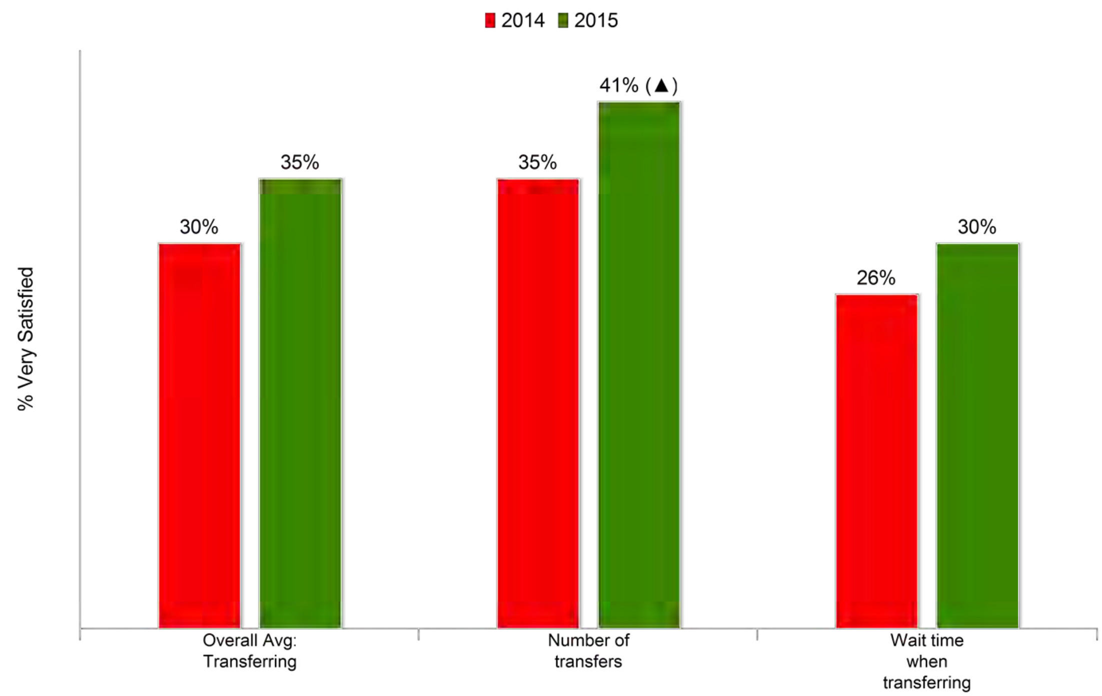
The percentage of "Very Satisfied" Riders increased to 35% in 2015 for the Transferring dimension. As with the increase in satisfaction with Level of Service, this increase follows a decrease between 2013 and 2014—from 39% to 30%, respectively. Currently, the percentage "very" satisfied remains below 2013.

The increase in the percentage "very" satisfied increased for both elements of service that were asked in both years, but is significant only for the number of transfers.

- The increase in the percentage "very" satisfied with number of transfers is due to increases among Riders in Seattle / North and East King County.
- The increase in the percentage of "very" satisfied with wait time is due to a significant increase among South King County Riders.

	% Very Satisfied	
	2014	2015
	Overall Average	
Seattle / North King	29%	34%
South King	32%	38%
East King	29%	35%
	Number of Transfers	
Seattle / North King	34%	42%
South King	36%	37%
East King	34%	41%
	Wait Time	
Seattle / North King	24%	27%
South King	29%	39%▲
East King	24%	29%

*Figure 61: Transferring: Changes in Satisfaction Ratings 2014–2015**



* *2015 averages shown here only contains those individual elements of service common to both 2014 and 2015. Therefore, 2015 averages presented here vary from the 2015 only figure on previous page which includes all individual elements of service including those new in 2015.*

Base: Regular and Infrequent Riders Who Transfer

	2014	2015
n	440	461
n_w	440	460

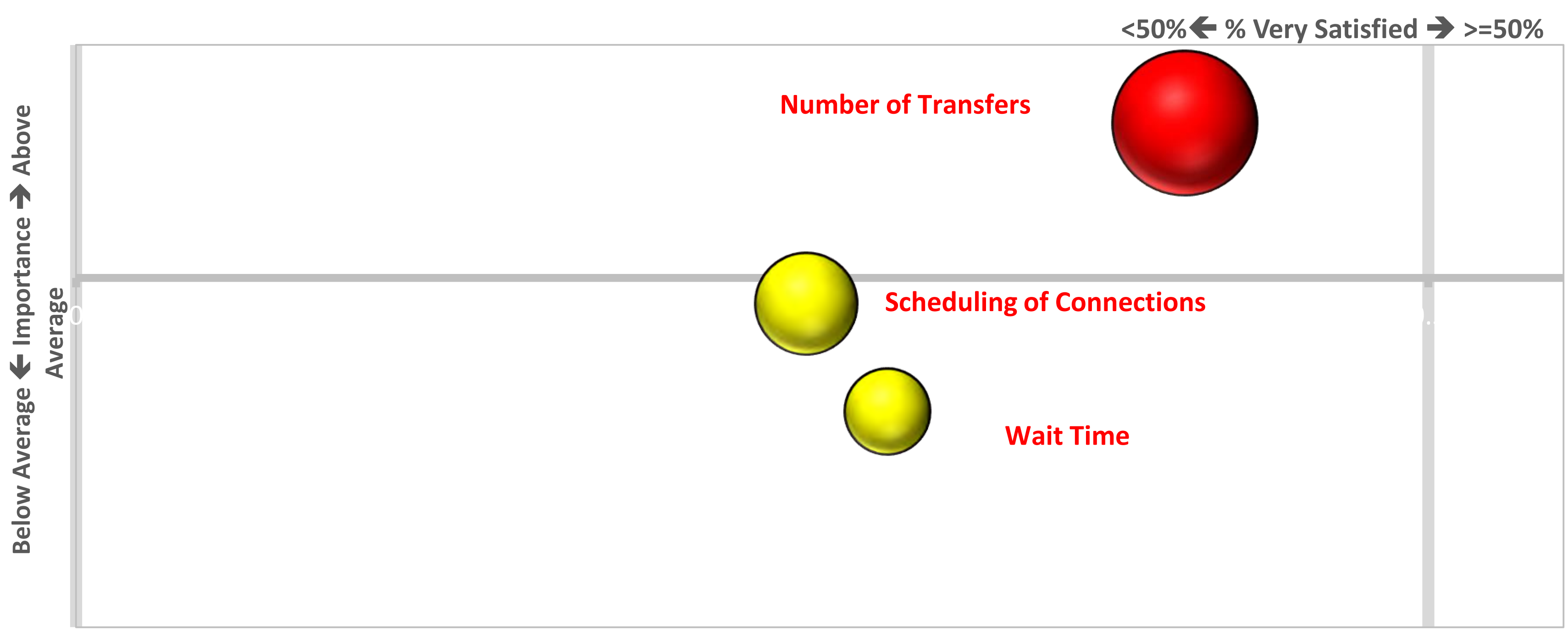
▲ / ▼ *indicates a statistically significant change from previous year*

Key Drivers Analysis

For those whose usual trip requires a transfer, all three elements of service are significant contributors to their overall satisfaction with and expectations of Metro.

- Number of transfers is more important than wait time and, despite, the increase in the percentage "very" satisfied noted on the previous page, should be the primary focus for improvement.
- In addition, scheduling of connections (i.e., the way service connections are scheduled when making transfers) is more important than wait time.

Figure 62: Key Drivers: Transferring



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

Personal Safety

Ratings 2015

Eighty-five percent (85%) of all Riders are satisfied with Personal Safety.

- Nearly half are very satisfied.

Riders are significantly more satisfied with Daytime Safety than with Safety after Dark.

- Riders are also more likely to be very satisfied with daytime safety while waiting at stops than while on board.

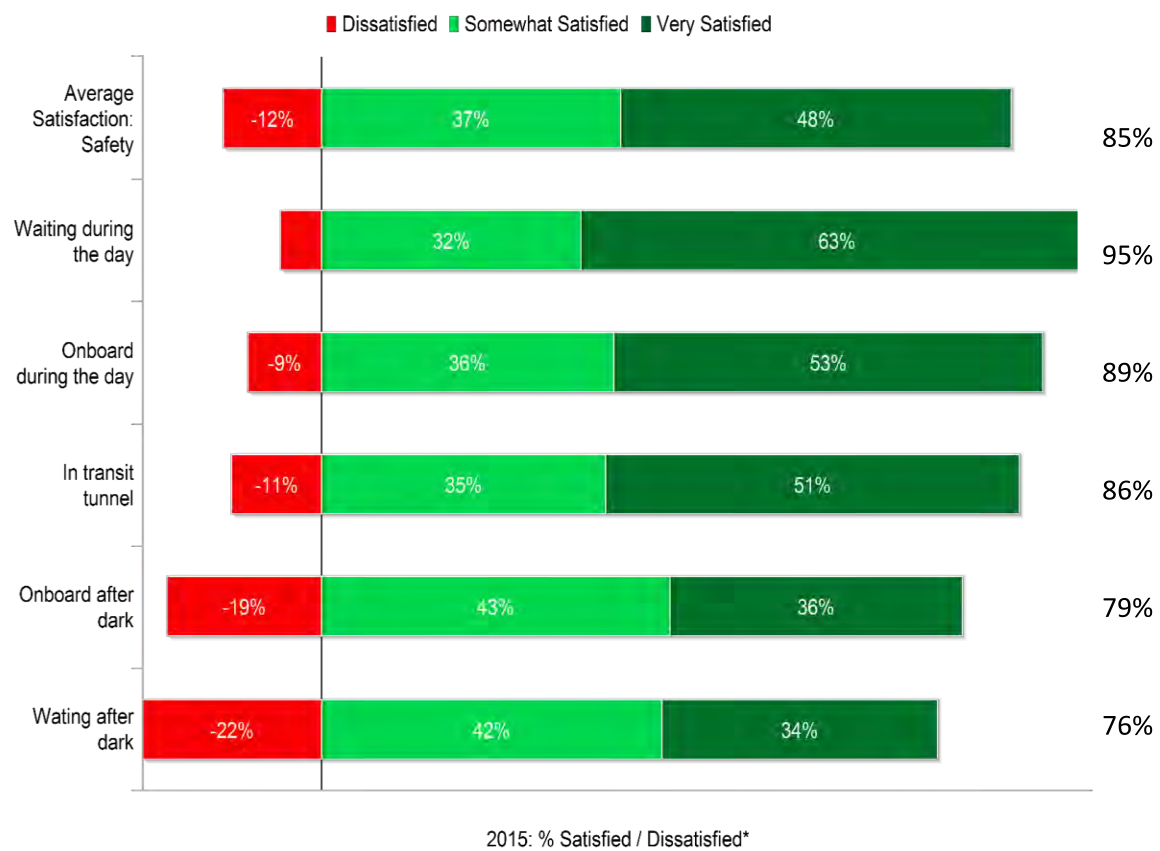
Infrequent Riders are less likely than Regular Riders to be "very" satisfied with safety due to greater concerns with daytime safety.

	% Very Satisfied	
	Regular Riders	Infrequent Riders
Overall Average	51%▲	44%▼
Waiting during day	69%▲	52%▼
Onboard during day	57%▲	46%▼
In transit tunnel	54%	46%
Onboard after dark	38%	32%
Waiting after dark	33%	38%

Riders living in South King County are less likely than those in other areas to be "very" satisfied with personal safety.

	South King County
Overall Average	41%▼
Waiting during day	52%▼
In transit tunnel	49%
Onboard during day	44%▼
Waiting after dark	30%
Onboard after dark	27%▼

Figure 63: Personal Safety: Ratings for Quality of Service 2015



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
Small percentages (<5%) do not show on graph

Base: Regular and Infrequent Riders

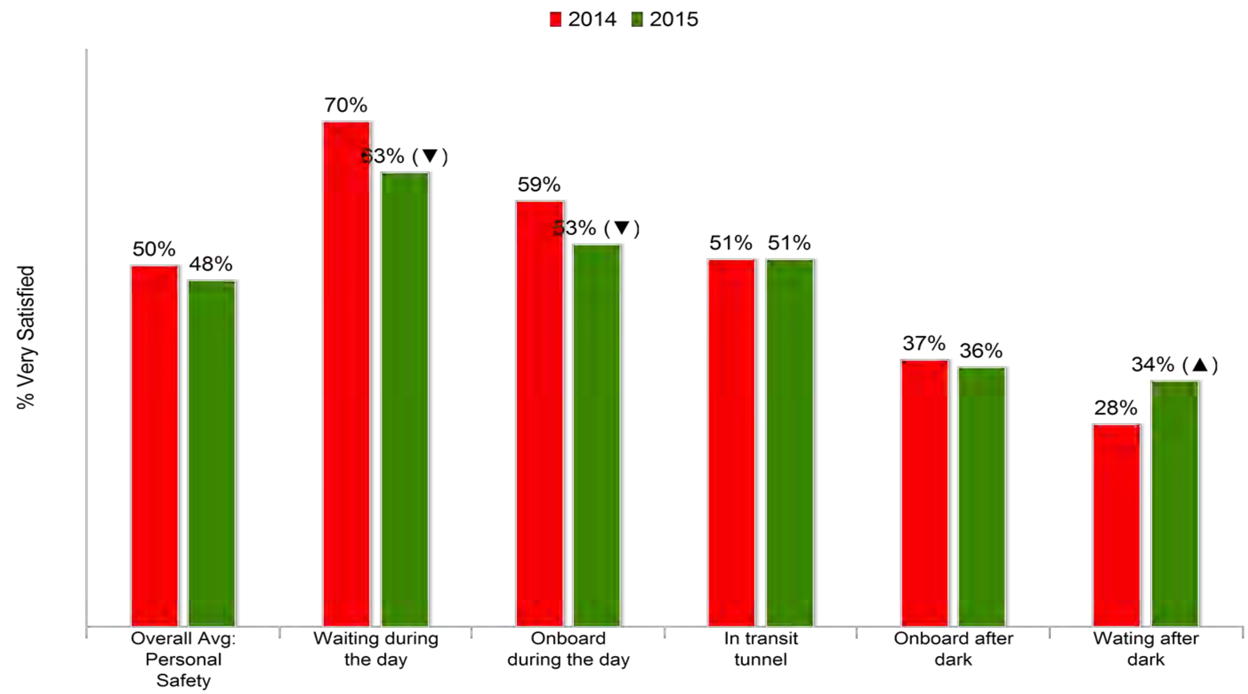
	n	*n_w*
2015	*1,025*	*1,025*

Changes in Ratings 2014–2015

Overall satisfaction with personal safety increased significantly between 2013 and 2014—from 44% "very" satisfied to 50%, respectively—and remained relatively stable in 2015. However, 2015 did see a decrease in the percent "very" satisfied with daytime safety. This was offset by an increase in satisfaction with safety while waiting after dark.

- This decrease in perceived safety during the daytime occurred primarily among Infrequent Riders—satisfaction with waiting during the daytime decreased from 67% to 52% and satisfaction with onboard safety during the day decreased from 59% to 46%.

Figure 64: Personal Safety: Changes in Ratings 2014–2015



Base: Regular & Infrequent Riders

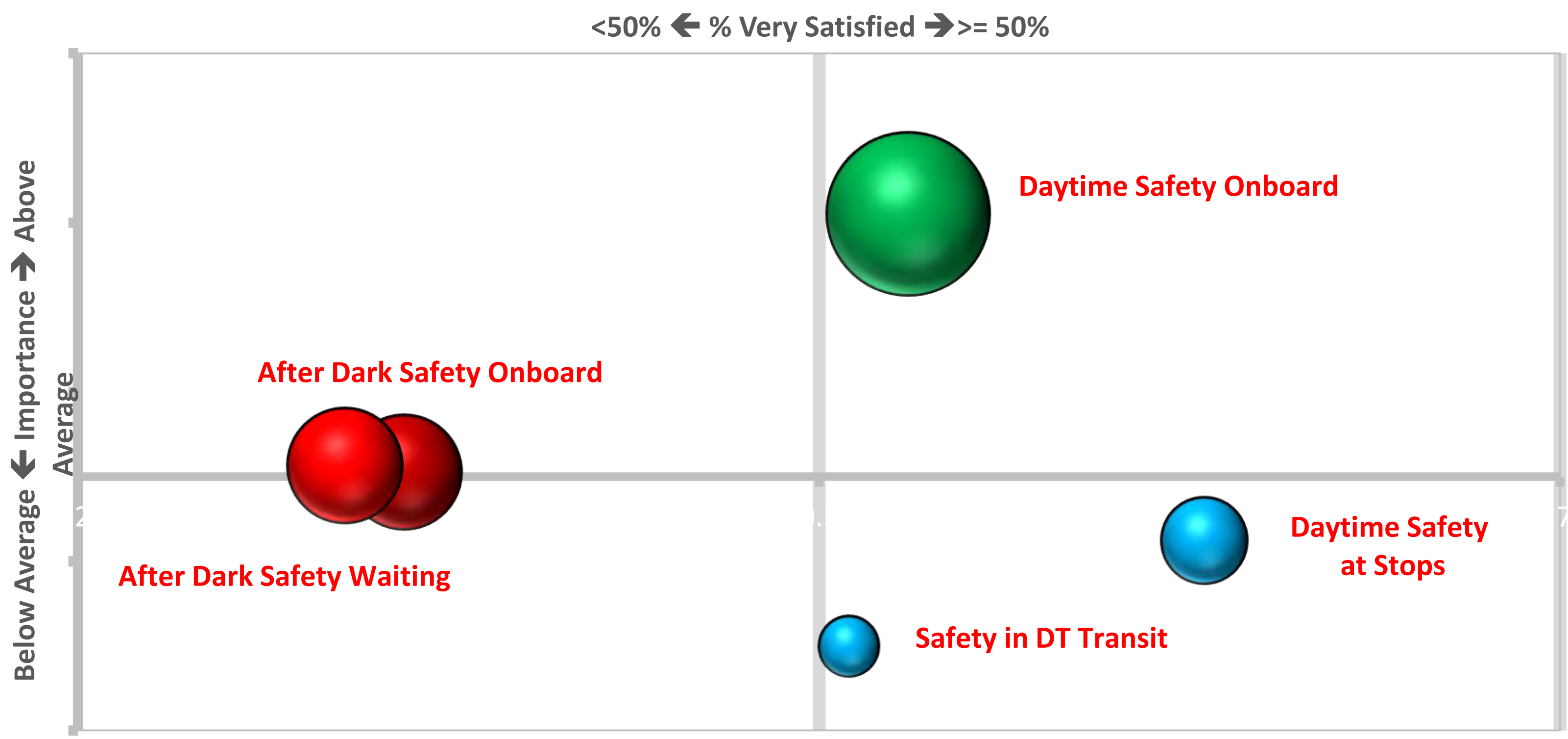
	2014	2015
n	*1,102*	*1,025*
n_w	*1,161*	*1,025*

Key Drivers Analysis

All aspects of safety are key drivers of Riders' overall satisfaction with and perceptions of Metro.

- Daytime safety while riding is the most important factor and Metro performs well on this aspect of safety.
- Safety after dark, onboard and while waiting, are key drivers and satisfaction is low. Both should be a continued focus for improvements.

Figure 65: Key Drivers: Personal Safety



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

Comfort and Cleanliness at Stops

Ratings 2015

Seven out of ten (70%) Riders are satisfied with the Comfort and Cleanliness at Stops. They are most satisfied with:

- Cleanliness of Shelters and Stops

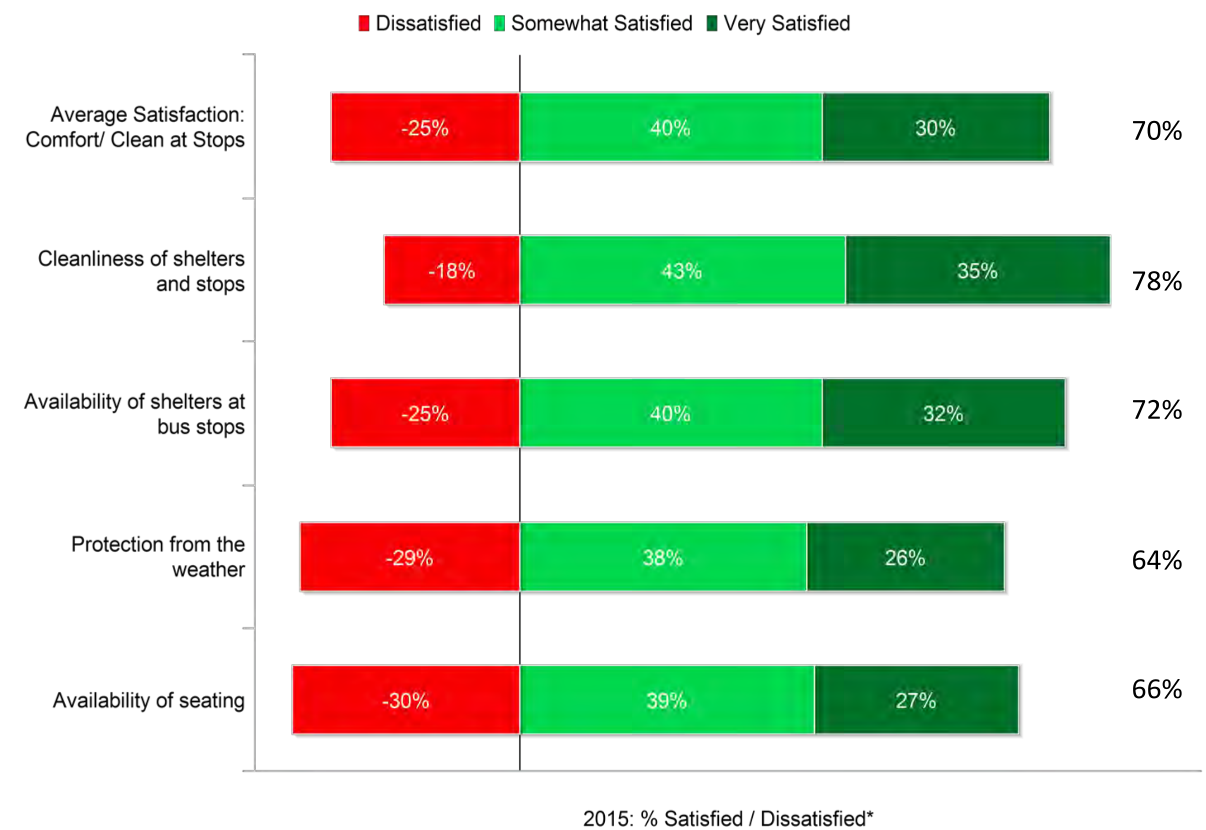
They are least satisfied with:

- Availability of Seating at Shelters and Stops
- Protection from the weather

There are no significant differences in ratings between Regular and Infrequent Riders

	% Very Satisfied	
	Regular Riders	Infrequent Riders
Overall Average	30%	31%
Cleanliness of shelters / stops	34%	39%
Availability of shelters	32%	33%
Protection from weather	26%	26%
Availability of seating	29%	24%

Figure 66: Comfort and Cleanliness at Stops: Ratings for Quality of Service 2015



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?

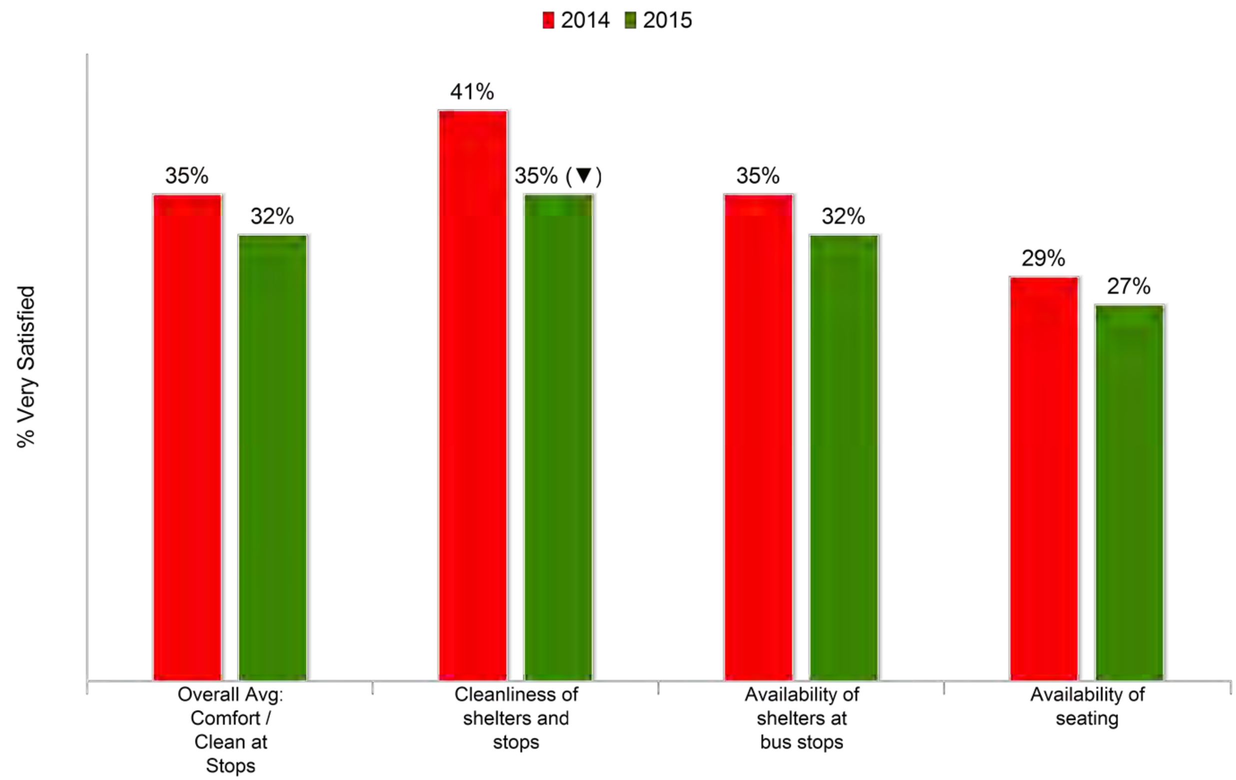
	Base: Random Subset of Regular and Infrequent Riders	
	n	n_w
2015	*535*	*534*

Changes in Ratings 2014–2015

Satisfaction with comfort and cleanliness at stops decreased slightly in 2015 due in part to a significant decrease in the percentage of Riders who were very satisfied with cleanliness at shelters and stops.

- This decrease is greatest among Riders living in East King County—from 45% in 2014 to 25% in 2015.

Figure 67: Comfort and Cleanliness at Stops: Changes in Ratings 2014–2015



* *2015 averages shown here only contains those individual elements of service common to both 2014 and 2015. Therefore, 2015 averages presented here vary from the 2015 only figure on previous page which includes all individual elements of service including those new in 2015.*

Base: Random Subset of Regular & Infrequent Riders

	2014	2015
n	518	535
n_w	536	534

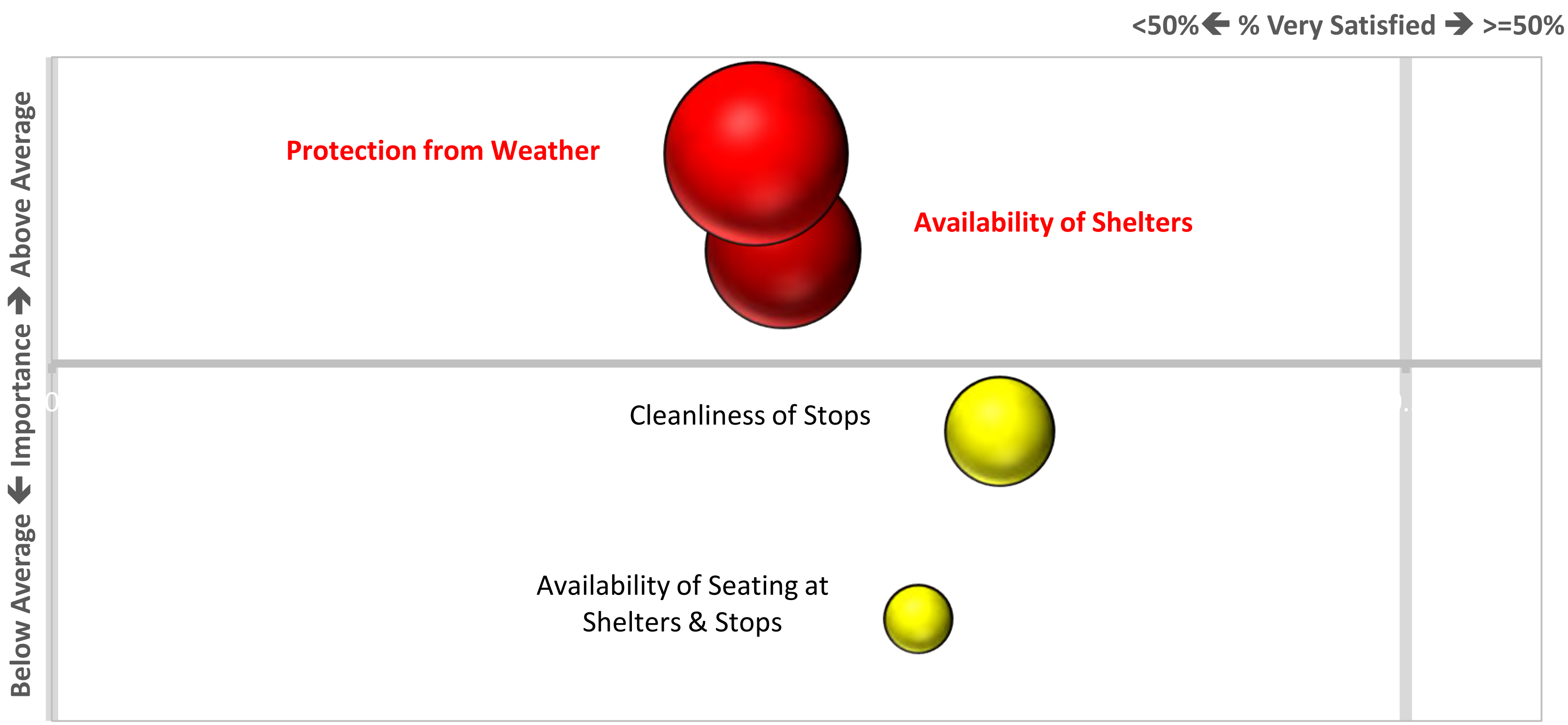
▲ / ▼ *indicates a statistically change from previous year*

Key Drivers Analysis

While not a key driver overall, two aspects of comfort at stops are key drivers and receive a low percentage (<40%) of "very" satisfied ratings.

- Protection from the weather is somewhat more important than availability of shelters.

Figure 68: Key Drivers: Comfort / Cleanliness at Stops



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

Comfort and Cleanliness Onboard

Ratings 2015

Three out of four Riders are satisfied with the Comfort and Cleanliness Onboard dimension. However, no elements of service achieve a "very" satisfied rating above 50 percent.

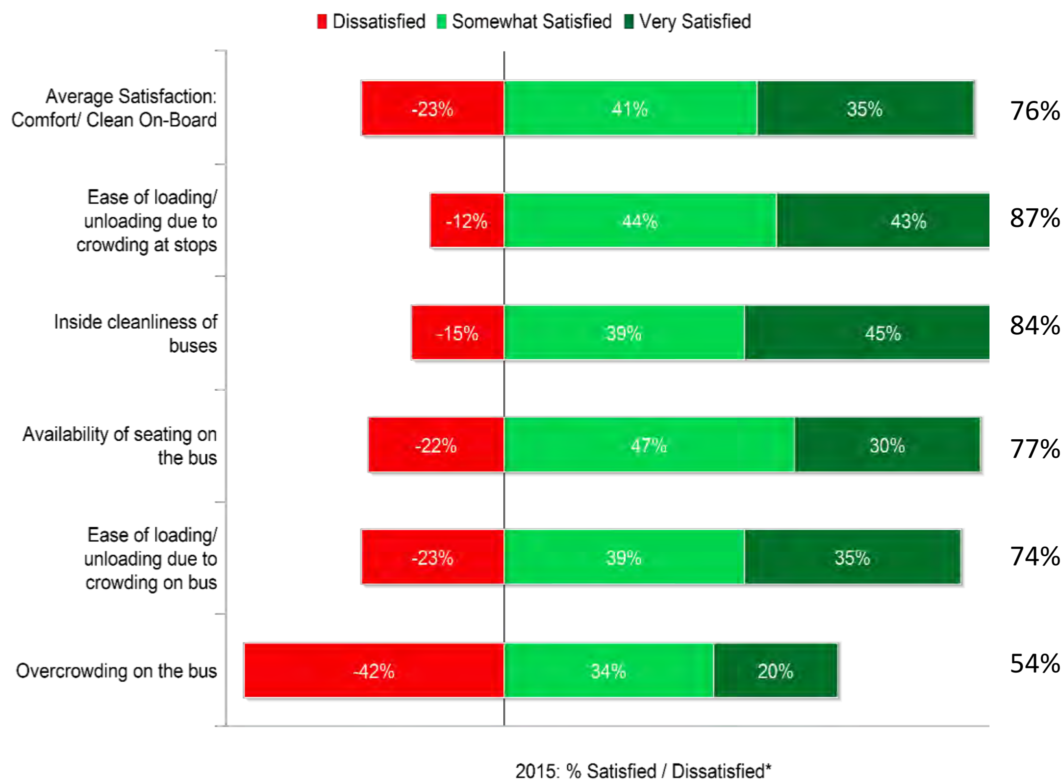
Riders are least satisfied with overcrowding on the buses.

In general, Regular Riders are less likely than Infrequent Riders to be "very" satisfied with comfort and cleanliness while riding. The difference is greatest for ease of loading and loading due to crowding on the buses followed by inside cleanliness.

	% Very Satisfied	
	Regular Riders	**Infrequent Riders**
Overall Average	33%	37%
Ease of loading / unloading due to crowding at stops	44%	42%
Inside cleanliness	42%	49%
Availability of seating	29%	33%
Ease of loading / unloading due to crowding on buses	33%	40%
Overcrowding	19%	21%

The percentage of "Very Satisfied" Riders is lowest in South King County (29%) due to significantly lower ratings for general overcrowding (12%) and availability of seating (23%).

Figure 69: Comfort and Cleanliness Onboard: Ratings for Quality of Service 2015



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?

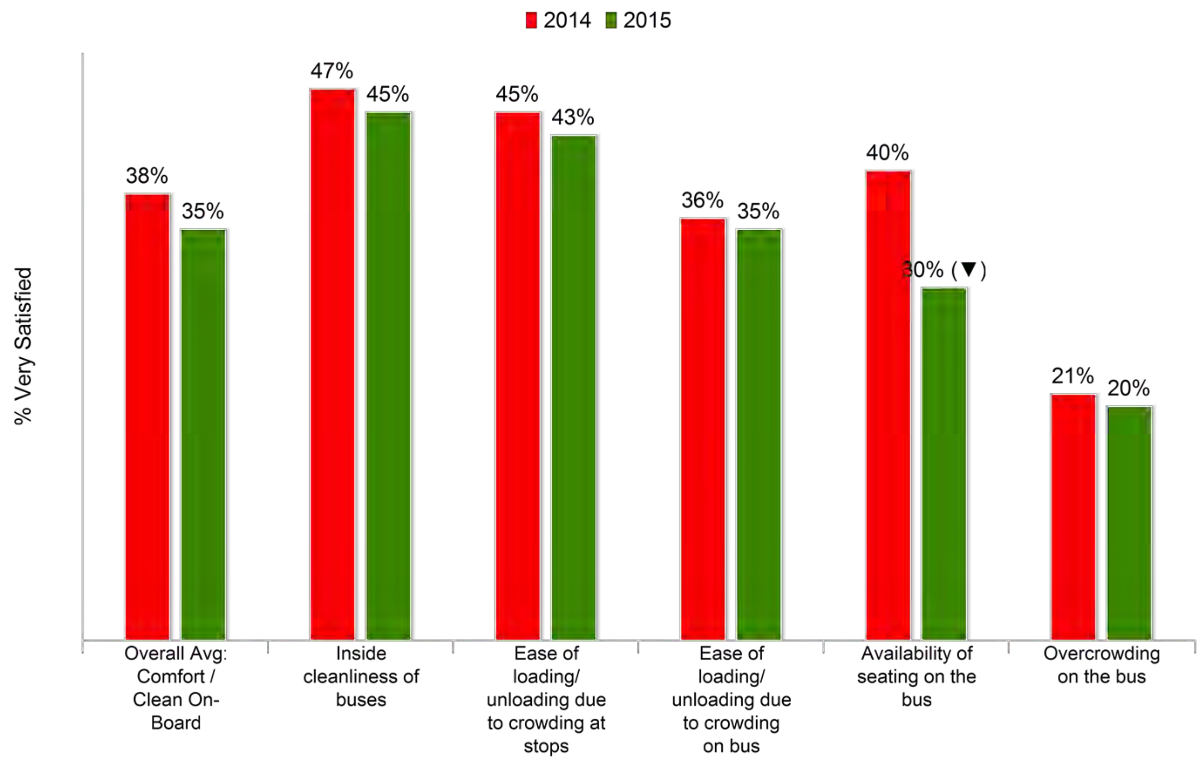
	Base: Random Subset of Regular and Infrequent Riders	
	n	*n_w*
2015	*535*	*534*

Changes in Ratings 2014–2015

The percentage of Riders “very” satisfied with comfort and cleanliness while on-board has been decreasing year over year—from 44% in 2013 to 38% in 2014 and again to 35% in 2015.

- The decrease between 2014 and 2015 is due mainly to decreased satisfaction with the availability of seating.

Figure 70: Comfort and Cleanliness On-Board: Changes in Ratings 2014–2015



Base: Random Subset of Regular & Infrequent Riders

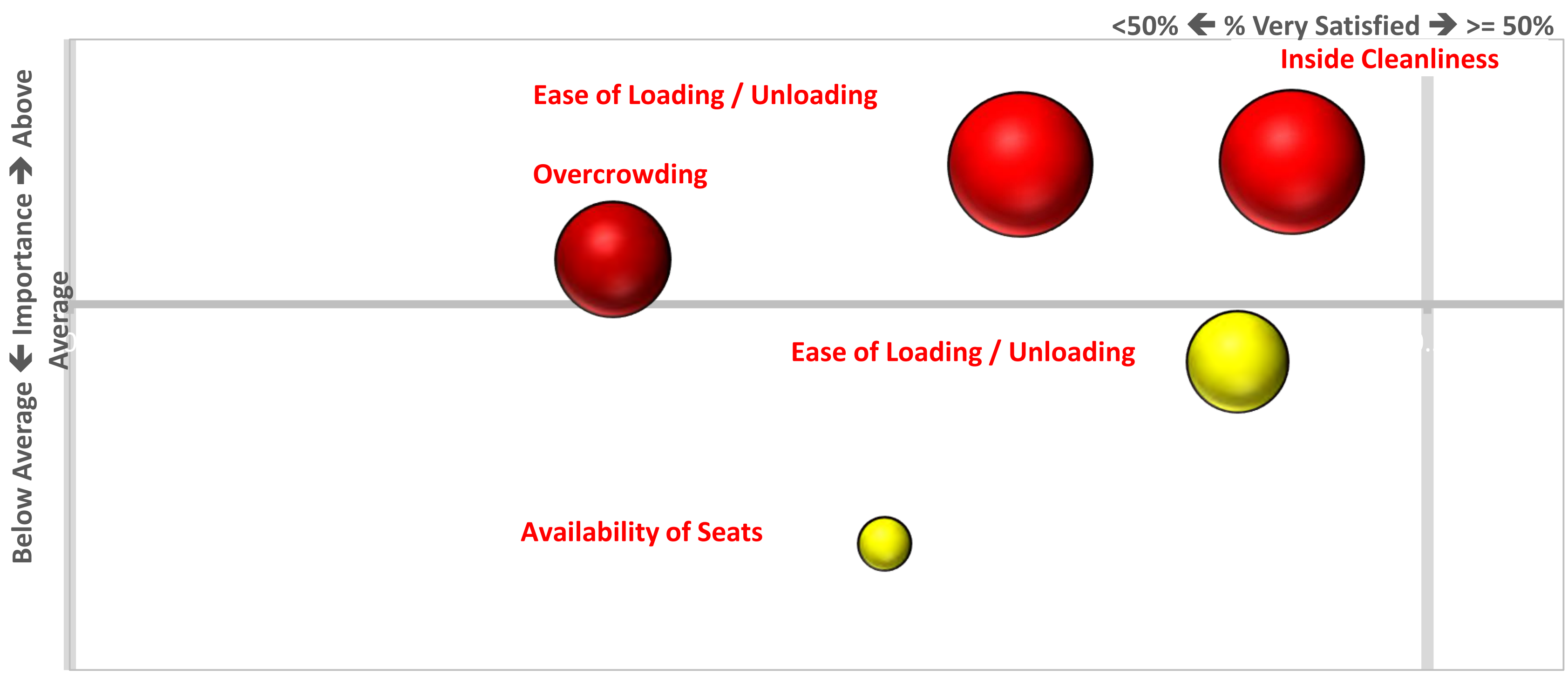
	2014	2015
n	518	535
n_w	536	534

Key Drivers Analysis

All five elements of comfort and cleanliness onboard are key drivers.

- Crowding on the bus, notably the ease of loading and unloading due to crowding on the bus, are the most significant issues.

Figure 71: Key Drivers: Comfort and Cleanliness Onboard



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

Park-and-Ride Lots

Ratings 2015

Park-and-ride lot users are generally satisfied with safety and security at the lots.

- They are less satisfied with vehicle security than with their own personal safety.

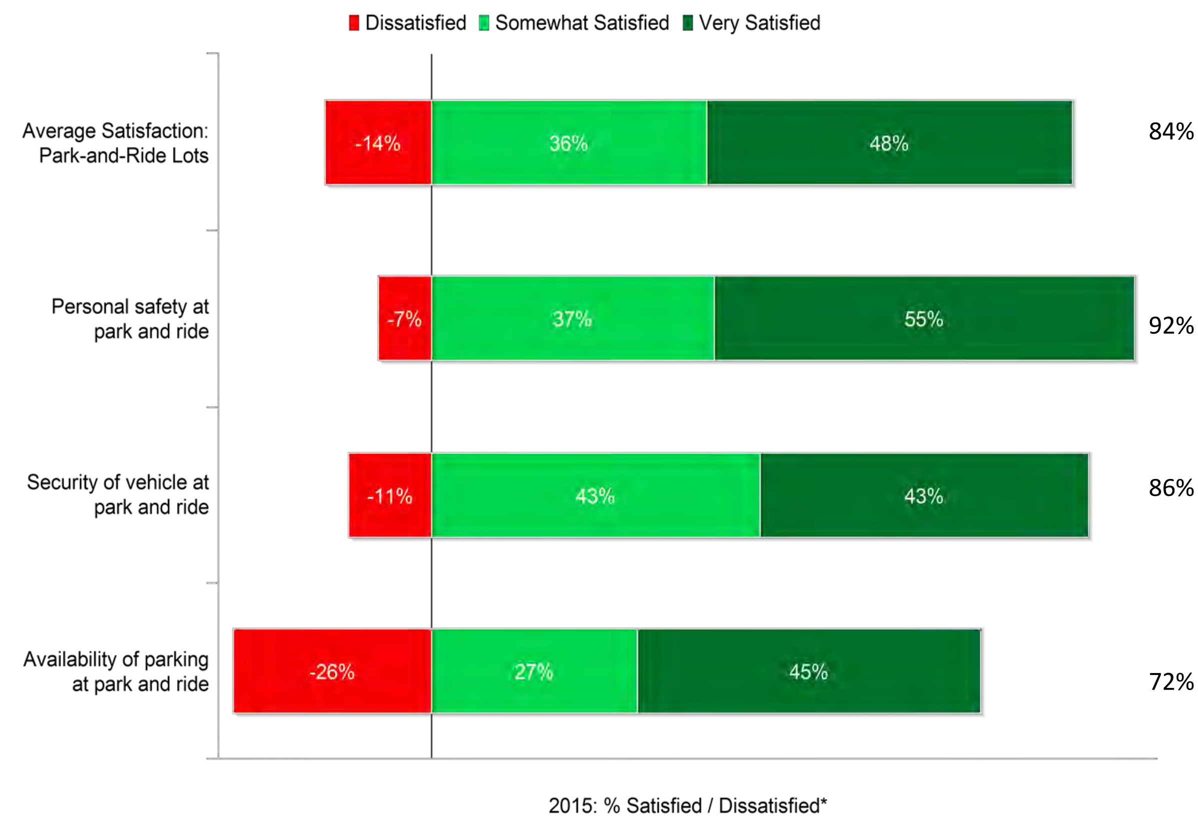
Park-and-ride lot users are significantly less satisfied with the availability of parking.

Park-and-ride lot users in East and, to a lesser extent, South King County are more satisfied than those living in Seattle / North King County.

- Safety and security is a greater problem in Seattle / North and South King County than in East King County.
- Parking availability is a significant problem for users in Seattle / North King County

% Very Satisfied			
	Seattle/ North	South King	East King
Overall Average	39% ▼▼	46% ▲▼	53% ▲▲
Personal Safety	47% ▼	51% ▼	62% ▲▲
Vehicle Security	37% ▼	38% ▼	49% ▲
Parking Availability	32% ▼▼	48% ▲	47% ▲

Figure 72: Park-and-Ride Lots: Ratings for Quality of Service 2015



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
Small percentages (<=5%) do not show on graph

Base: Park-and-Ride Lot Users

	n	*n_w*
2015	*538*	*480*

Changes in Ratings 2014–2015

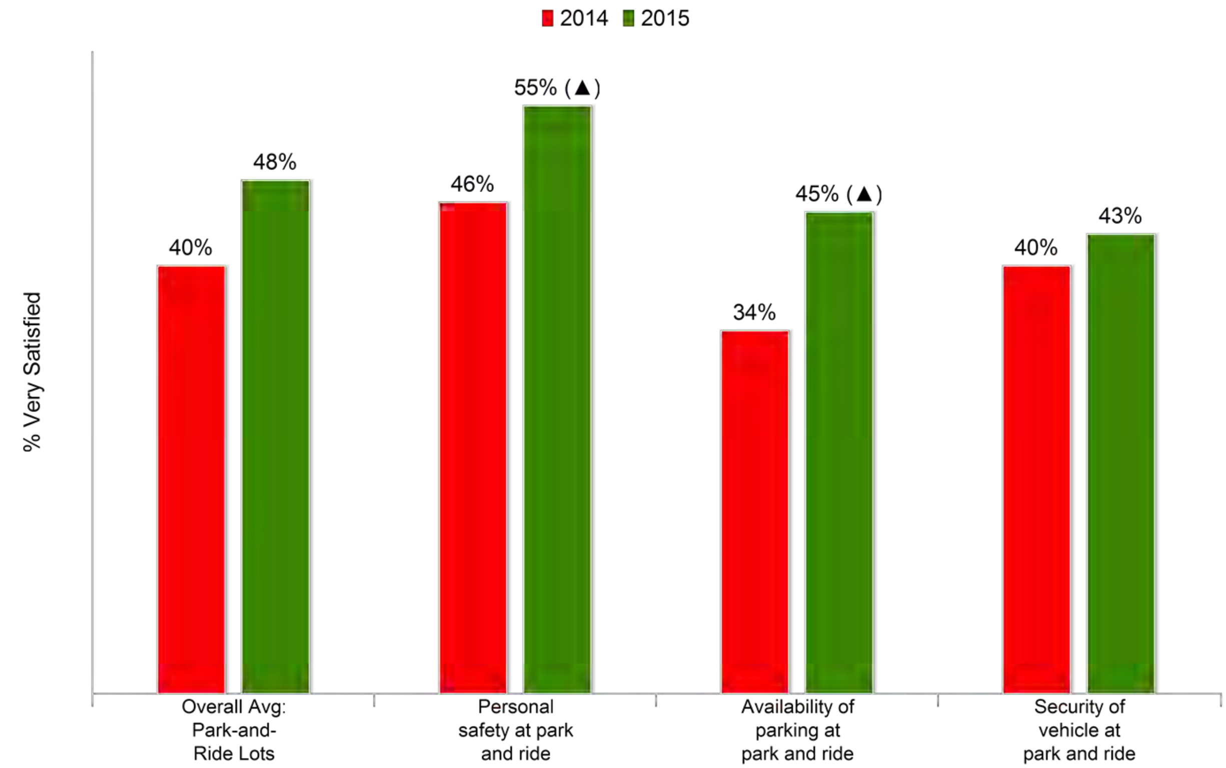
Park-and-ride lot users' satisfaction increased significantly from 2014.

Overall satisfaction with park-and-ride lots increased in all areas.

- The increase was greatest among users in East King County, due to a significant increase in the percent "very" satisfied with parking availability—31% in 2014 to 47% in 2015.
- Overall satisfaction among users in South King County increased due to a significant increase in the percent "very" satisfied with personal safety—40% in 2014 to 51% in 2015.
- The increase in overall satisfaction among users in Seattle / North King County is due to increases in all three elements of service; however, none were statistically significant.

	Overall Average % Very Satisfied	
	2014	**2015**
Seattle / North King	33%	39%
South King	39%	46%
East King	44%	53%

Figure 73: Park-and-Ride Lots: Changes in Ratings 2014–2015



Base: Park-and-Ride Lot Users

	2014	2015
n	*448*	*538*
n_w	*518*	*480*

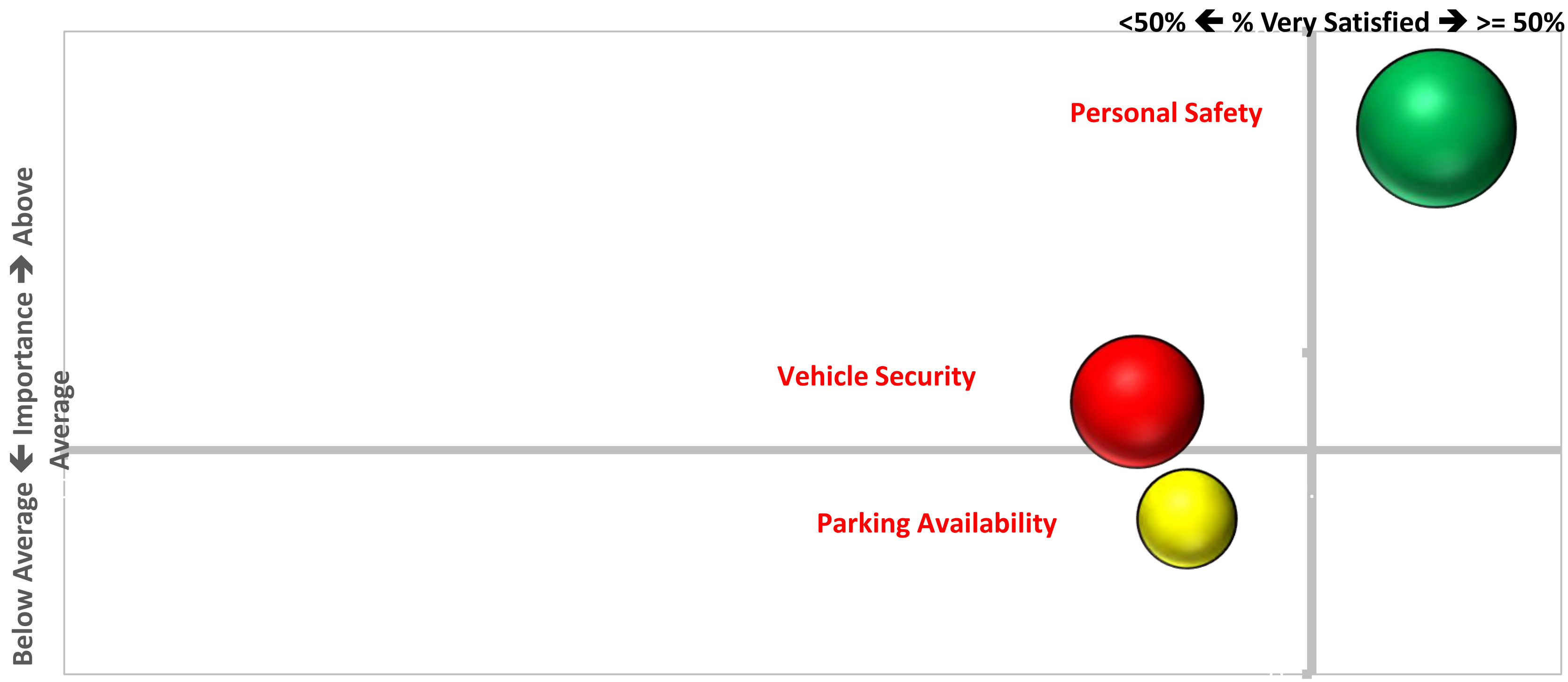
▲ / ▼ *indicates a statistically significant change from previous year*

Key Drivers Analysis

All three elements of service related to park-and-ride lots are key drivers.

- The most important element is personal safety, and users are generally satisfied.
- Vehicle security is the second most important element of service and users are less satisfied.

Figure 74: Key Drivers: Park-and-Ride Lots



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

Information Sources

Ratings 2015

Riders are highly satisfied with their ability to get information about Metro.

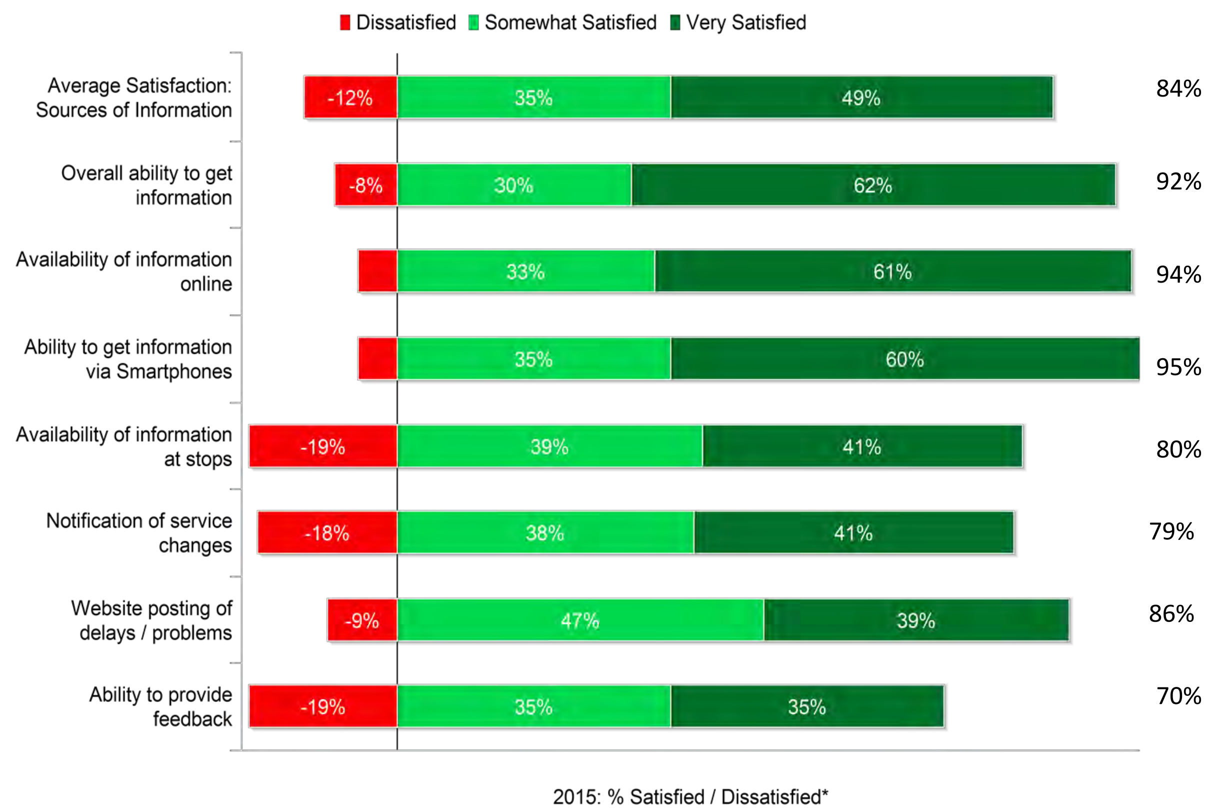
- Infrequent Riders are less satisfied than Regular Riders with sources of information about Metro, notably their ability to get information via their Smartphones.

Riders are least satisfied with their ability to provide feedback.

- Infrequent Riders are significantly less satisfied with this element of service.

	% Very Satisfied	
	Regular Riders	**Infrequent Riders**
Overall Average	53%▲	43%▼
Overall ability to get information	61%	62%
Availability of info. online	66%	54%
Information via Smartphones	66%▲	48%▼
Information at stops	42%	41%
Notification of service changes	43%	36%
problems	45%	25%
Ability to provide feedback	41%▲	20%▼

Figure 75: Information Sources: Ratings for Quality of Service 2015



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
Small percentages (<=5%) do not show on graph

	Base: Random Subset of Regular and Infrequent Riders	
	n	*n_w*
2015	*490*	*491*

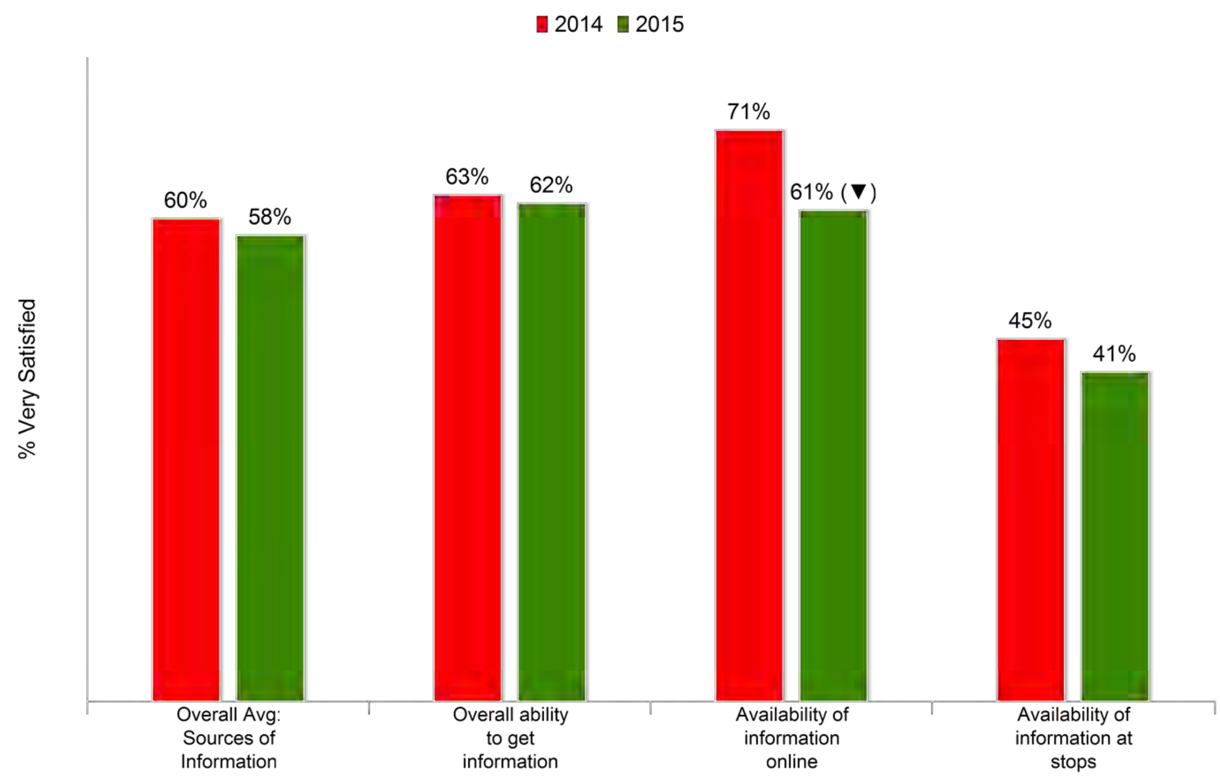
Changes in Ratings 2014–2015

The percentage of Riders' who are very satisfied with Sources of Information has remained high over the years.

The percentage very satisfied with the availability of information online decreased in 2015, returning to about 2013 levels (60%).

- This decrease is a result of a significant decrease among Infrequent Riders—from 75% to 54% very satisfied.

*Figure 76: Information Sources: Changes in Ratings 2014–2015**



* *2015 averages shown here only contains those individual elements of service common to both 2014 and 2015. Therefore, 2015 averages presented here vary from the 2015 only figure on previous page which includes all individual elements of service including those new in 2015.*

Base: Random Subset of Regular and Infrequent Riders
base varies based on use of information source

	2014	2015
n	*569*	*490*
n_w	*579*	*491*

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

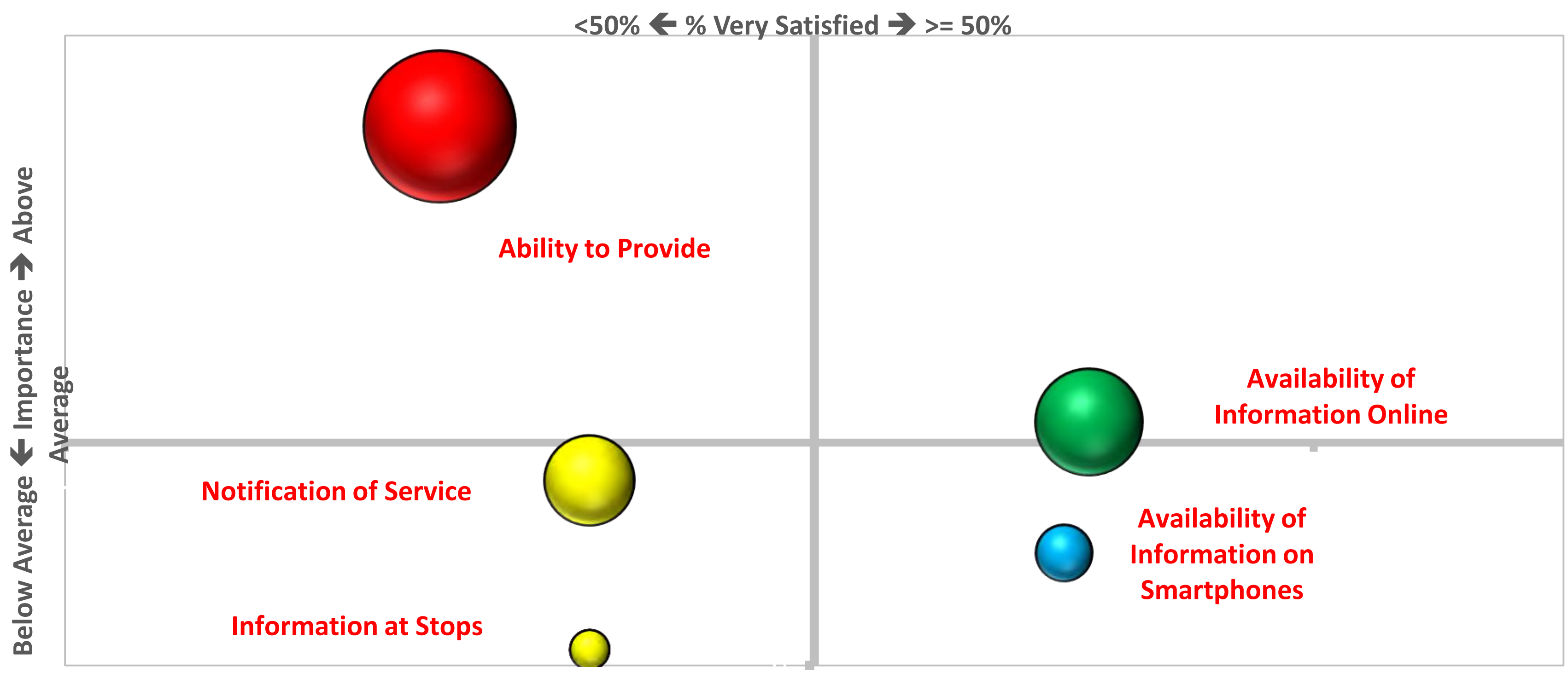
Key Drivers Analysis

Two elements related to sources of information were **not** included in the Key Drivers Analysis due to low sample sizes for website postings of delays and problems and the high correlation between overall ability to get information and the individual elements (high multi-colinearity).

All other elements of service related to sources of information about Metro are key drivers. Despite high use of Smartphones to get information, the availability of information online is more important than availability of information via Smartphones.

- Riders place the most importance on their ability to provide feedback and they are least satisfied with this element of service.

*Figure 77: Key Drivers: Sources of Information**



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

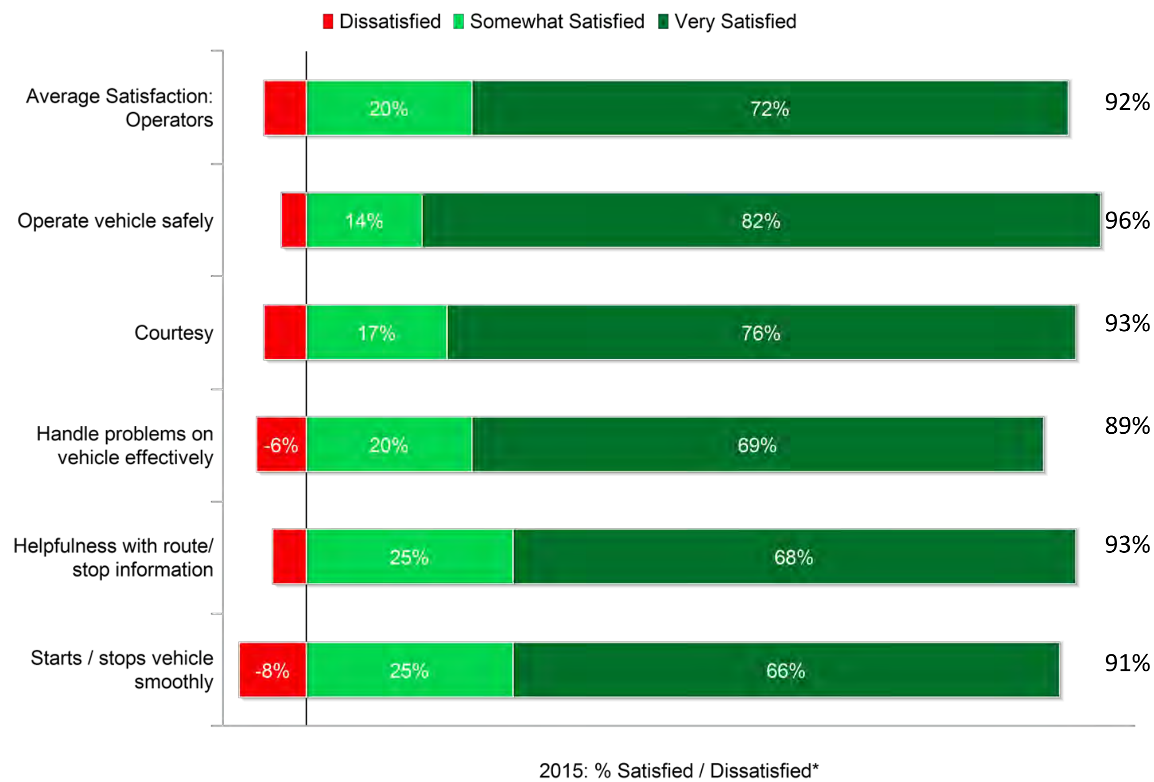
Metro Operators

Ratings 2015

Metro's operators are a significant asset.

- More than nine out of ten Riders are satisfied with Metro's Operators. More than seven out of ten are very satisfied.

Figure 78: Metro Operators: Ratings for Quality of Service 2015



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]? Small percentages (<=5%) do not show on graph

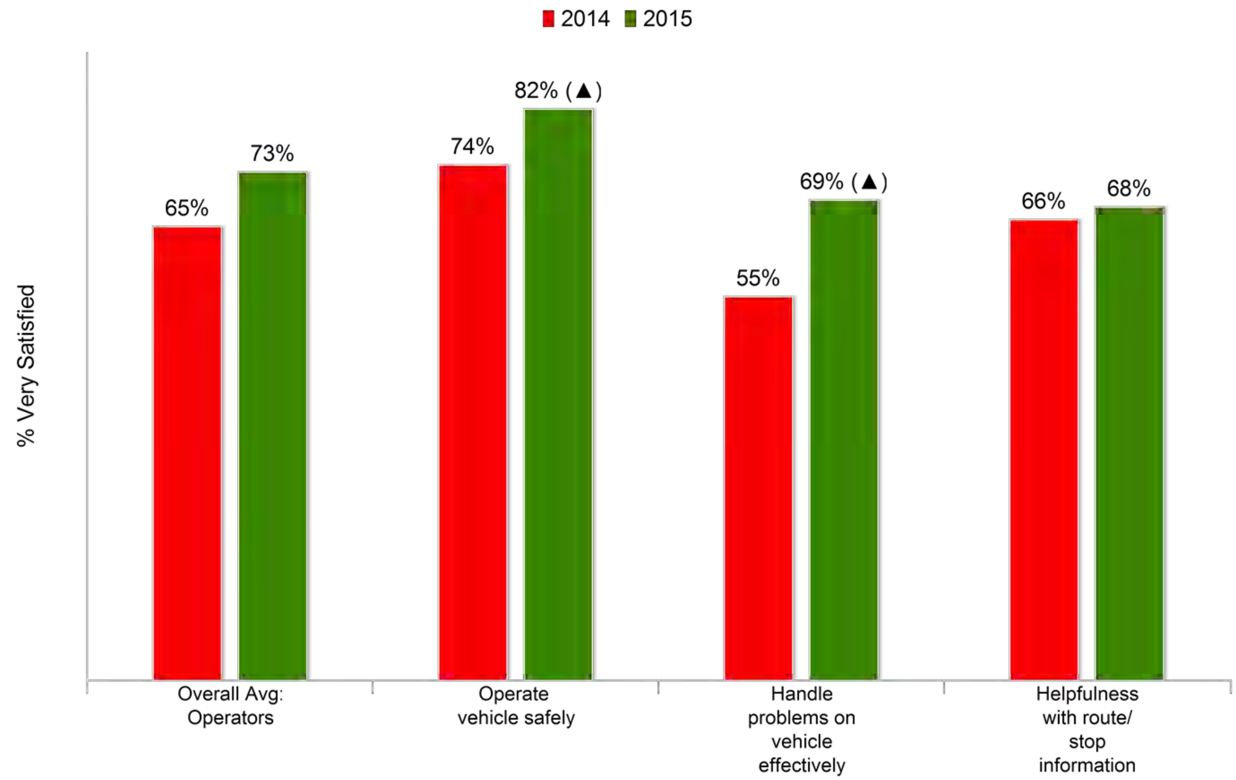
	Base: Random Subset of Regular and Infrequent Riders	
	n	n_w
2015	*490*	*491*

Changes in Ratings 2013—2014

The percentage of Riders "very" satisfied with Metro operators increased in 2015 due to a significant increase in ratings of how well operators handle problems on their vehicles.

This is noteworthy as the percentage "very" satisfied with this element of service decrease significantly between 2013 and 2014—from 64% to 55%, respectively. The current level of satisfaction is higher than that seen in all prior years.

*Figure 79: Metro Operators: Changes in Ratings 2014–2015**



* *2015 averages shown here only contains those individual elements of service common to both 2014 and 2015. Therefore, 2015 averages presented here vary from the 2015 only figure on previous page which includes all individual elements of service including those new in 2015.*

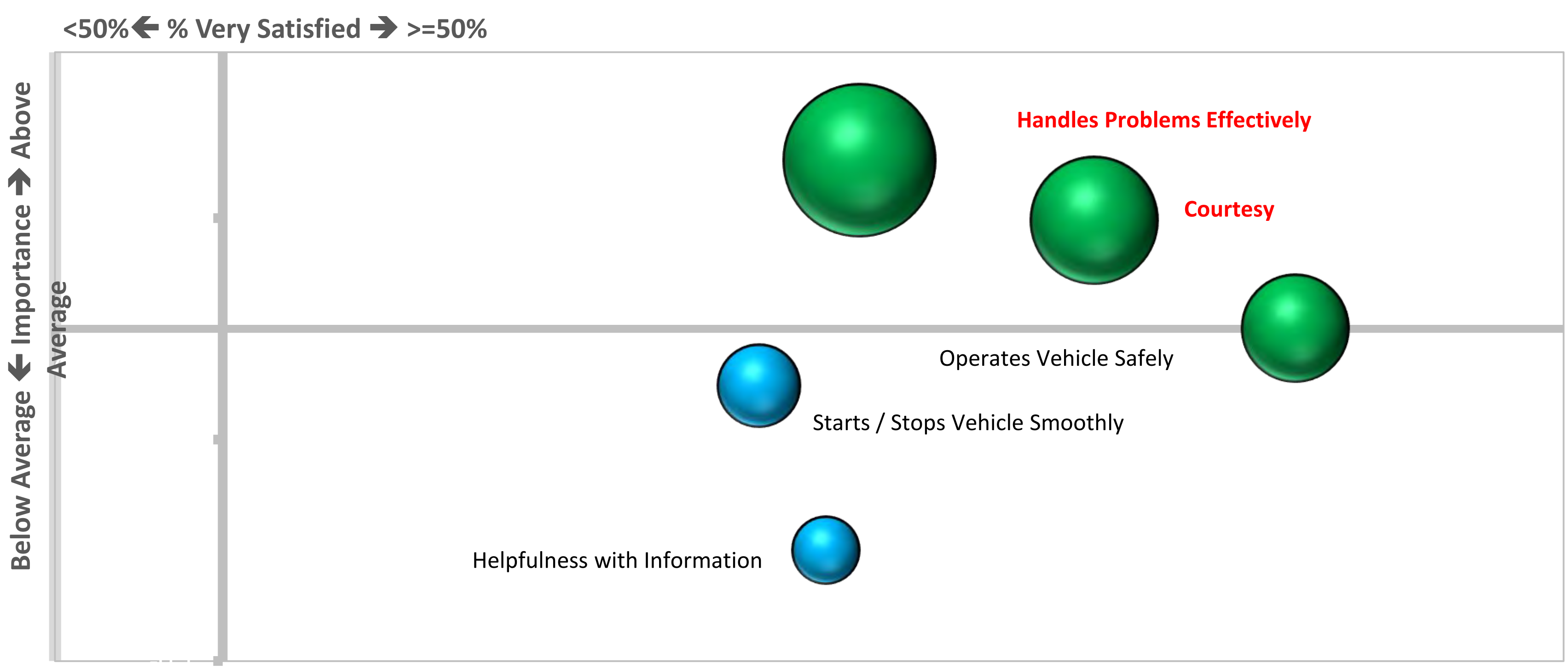
	Random Subset of Regular and Infrequent Riders	
	2014	*2015*
n	*577*	*490*
n_w	*587*	*491*

Key Drivers Analysis

Only two out of the five elements of service for Metro operators are key drivers. How well operators handle problems on the bus is the most significant driver.

- Courtesy is a new element of service (added in 2015) and is significantly more important than operators' helpfulness with information. Metro operators perform very well on these two most important elements of service.

Figure 80: Key Drivers: Metro Operators



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

Fare Payment

Ratings 2015

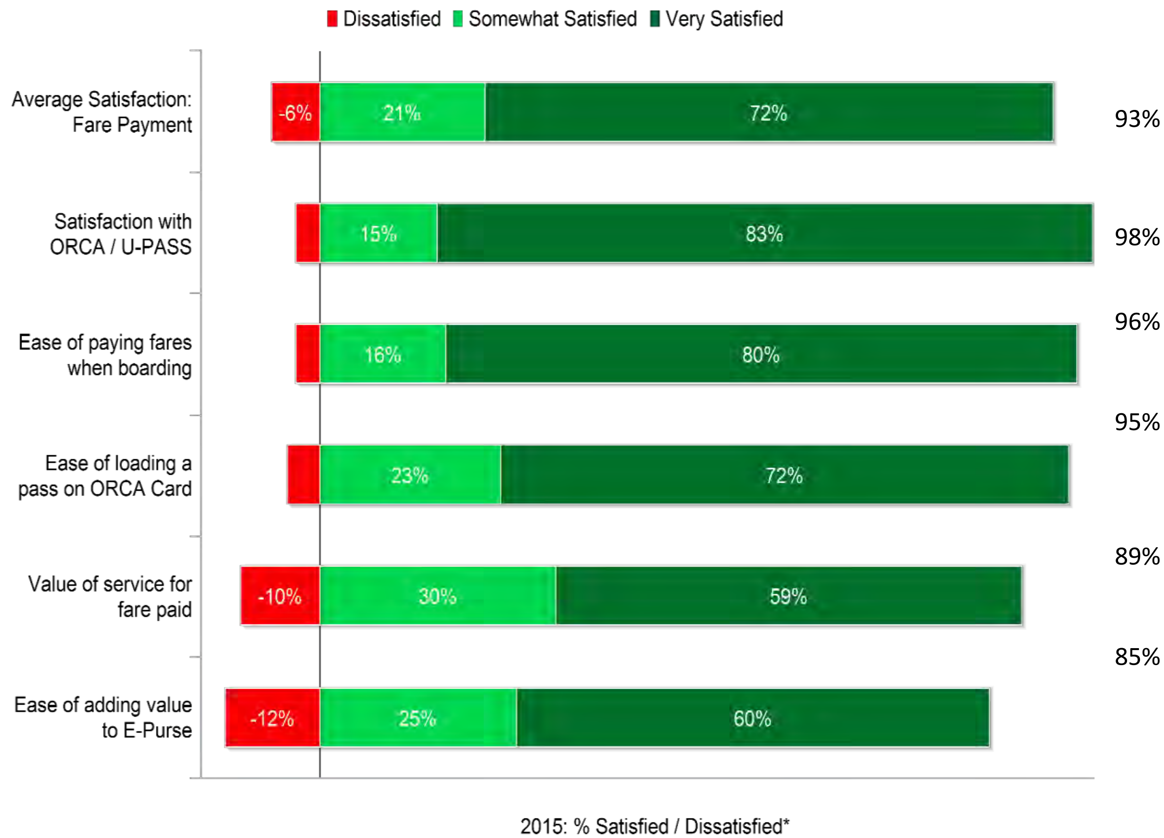
Riders are highly satisfied with all elements of service within the Fare Payment dimension.

- Riders are more likely to say they are very satisfied with the Ease of Loading a Pass on an ORCA Card than the Ease of Adding Value to an E-Purse.

Infrequent Riders are somewhat less satisfied with fare payment due to a significantly lower percentage of those "very" satisfied with ease of paying fares when boarding.

	% Very Satisfied	
	Regular Riders	Infrequent Riders
Overall Average	75%	65%
Satisfaction with ORCA / U-PASS	85%	77%
Ease of paying fares when boarding	84%▲	73%▼
Ease of loading pass on ORCA	72%	69%
Value of service for fare paid	62%	53%
Ease of adding value to E-Purse	63%	56%

Figure 81: Fare Payment: Ratings for Quality of Service 2015



Questions: Are you satisfied or dissatisfied with [ELEMENT OF SERVICE]? Would that be very or somewhat [satisfied / dissatisfied]?
Small percentages (<=5%) do not show on graph
Base: Regular and Infrequent Riders
(varies based on ORCA use)

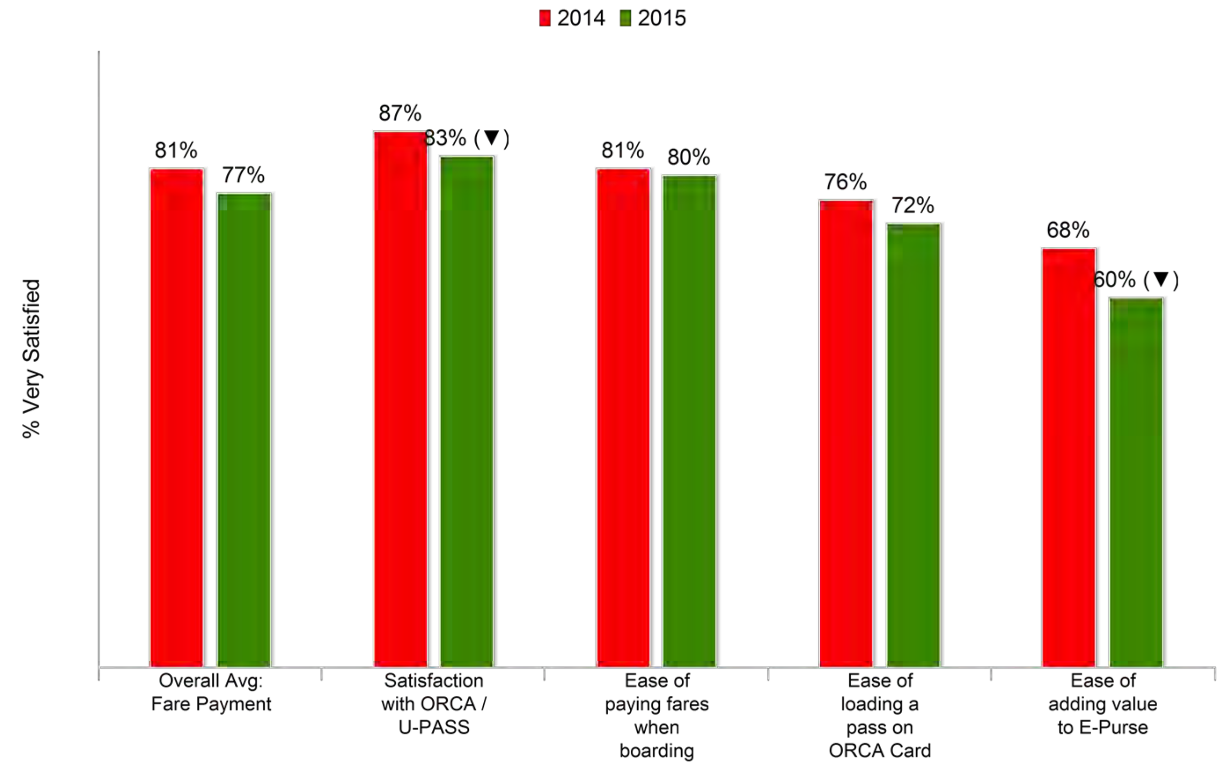
	n	n_w
2015	*1,025*	*1,025*

Changes in Ratings 2014–2015

Riders remain highly satisfied with all elements of service within the Fare Payment dimension. However, the percentage very satisfied decreased for:

- Satisfaction with ORCA or U-PASS
- Ease of adding value to an E-Purse

*Figure 82: Fare Payment: Changes in Ratings 2014–2015**



* *2015 averages shown here only contains those individual elements of service common to both 2014 and 2015. Therefore, 2015 averages presented here vary from the 2015 only figure on previous page which includes all individual elements of service including those new in 2015.*

Base: Regular and Infrequent Riders; base varies based on ORCA Card, pass, and E-Purse use

	Base: Regular and Infrequent Riders; base varies based on ORCA Card, pass, and E-Purse use	
	2014	2015
n	*1,102*	*1,025*
n_w	*1,161*	*1,025*

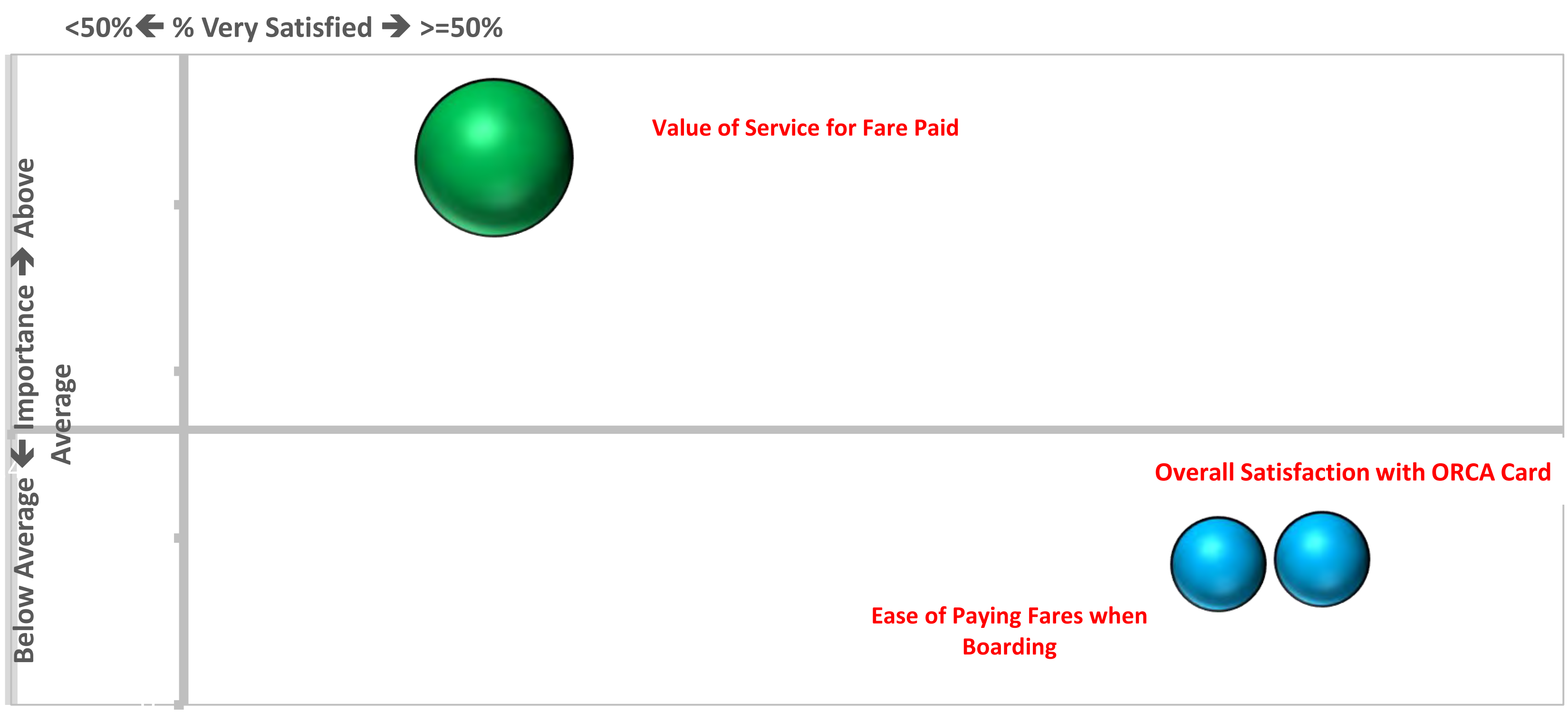
▲ / ▼ *indicates a statistically significant change from previous year*

Key Drivers Analysis

Only three elements of fare payment were included in the Key Drivers Analysis. Ease of adding value to an E-Purse or loading a pass are not included as these questions were only asked of a subset of Riders (those who pay with ORCA and who have a pass or E-Purse loaded on their ORCA Card).

- The value of service received for the fare paid is by far the single largest driver of Riders' overall satisfaction with and perception of Metro and Riders are generally very satisfied with this element of service.

Figure 83: Key Drivers: Fare Payment



Red text indicates item is a key driver of overall satisfaction with and perceptions of Metro; size of bubble indicates impact on overall satisfaction and perceptions of Metro

FINDINGS: NON-RIDERS

Summary

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Transit Use</td>
<td>One out of three Non-Riders (those who did not ride in the previous month) have used Metro in the past year; 21% within the past six months. Primary use is for non-commute trips—for example, recreation or to get to downtown Seattle.

At the same time a significant percentage of Non-Riders have never ridden (11%) or have not ridden Metro within the past five years (32%).</td>
<td>
<table>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><td colspan="3">Used Metro in Past Year</td></tr>
<tr><td>32%</td><td>37%▲</td><td>32%▼</td></tr>
<tr><td colspan="3">Never Ridden Metro</td></tr>
<tr><td>16%</td><td>11%▼</td><td>11%</td></tr>
<tr><td colspan="3">Have not Ridden Within Past 5 Years (includes Never Ridden)</td></tr>
<tr><td>43%</td><td>38%</td><td>43%</td></tr>
<tr><td colspan="3">Significant increase (▲) or (▼) from previous year</td></tr>
</table>
</td>
<td>There is clearly a segment of Non-Riders who are open to using public transportation. Understanding and addressing their needs for service could increase ridership.</td>
</tr>
<tr>
<td>Potential Use of Metro</td>
<td>Non-Riders' attitudes toward riding are decidedly mixed. Just under half suggest that riding is at least somewhat appealing while just over half say that it is not appealing. However, the strength of these attitudes is stronger among those who say it is not appealing.

One out of six Non-Riders said that they would be very likely to ride if convenient service was available.

More frequent service was the most important improvement provided by all Non-Riders with at least some stated potential to use Metro.</td>
<td>
<table>
<tr><th></th><th>% of Non-Riders</th></tr>
<tr><td>Total Appealing</td><td>48%</td></tr>
<tr><td>Very Appealing</td><td>18%</td></tr>
<tr><td>Somewhat Appealing</td><td>30%</td></tr>
<tr><td>Total Not Appealing</td><td>52%</td></tr>
<tr><td>Not Very Appealing</td><td>20%</td></tr>
<tr><td>Not at All Appealing</td><td>32%</td></tr>
<tr><td>Potential Riders</td><td>32%</td></tr>
<tr><td>Very Likely to Ride</td><td>17%</td></tr>
<tr><td>Somewhat Likely to Ride</td><td>15%</td></tr>
<tr><td>No Potential</td><td>59%</td></tr>
<tr><td>Limited Likelihood</td><td>9%</td></tr>
<tr><td>Very Unlikely to Ride</td><td>59%</td></tr>
</table>
</td>
<td>While there is some potential to increase ridership among current Non-Riders notably those with recent experience riding, long-term ridership growth is most likely to come from retention of existing Riders and attracting New Riders as people move into the region.

Reaching out directly to Non-Riders who have had recent experience with riding with additional information about available service could encourage additional use of Metro.</td>
</tr>
</table>

Transit Use

Metro

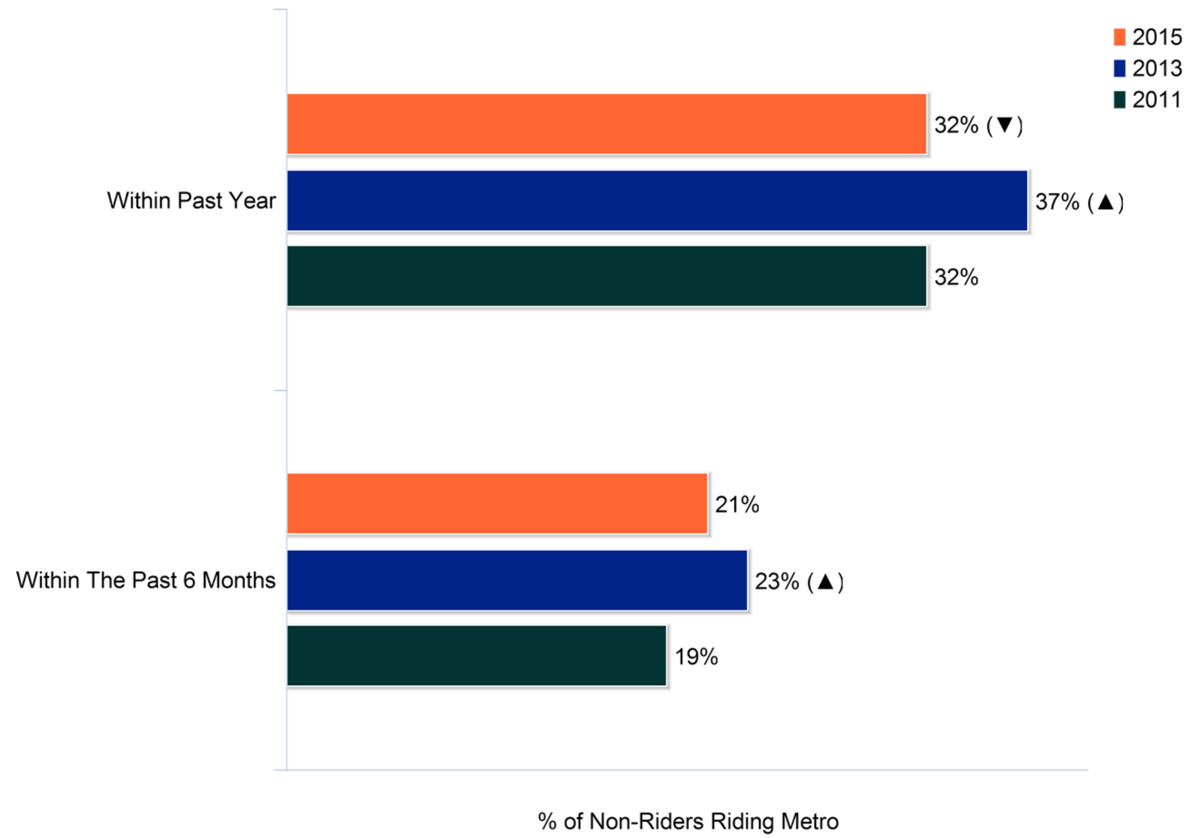
Nearly one out of three Non-Riders have had relatively recent experience with Metro (ridden within the past year). One out of five have ridden within the past six months.

- The percentage with recent experience increased significantly between 2011 and 2013 but then dropped in 2015.

Recent use of Metro is highest among Non-Riders living in Seattle / North and, to a lesser extent, East King County.

	% of Non-Riders Riding Metro within Past Year
Seattle / North King	46%
South King	22%
East King	38%

Figure 84: Non-Riders' Use of Metro in the Past Year



Questions: NON2 When was the last time you rode a Metro bus?

	Base: Non-Riders		
	2011	*2013*	*2015*
n	*1,066*	*1,019*	*815*
n_w	*1,828*	*1,522*	*1,207*

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

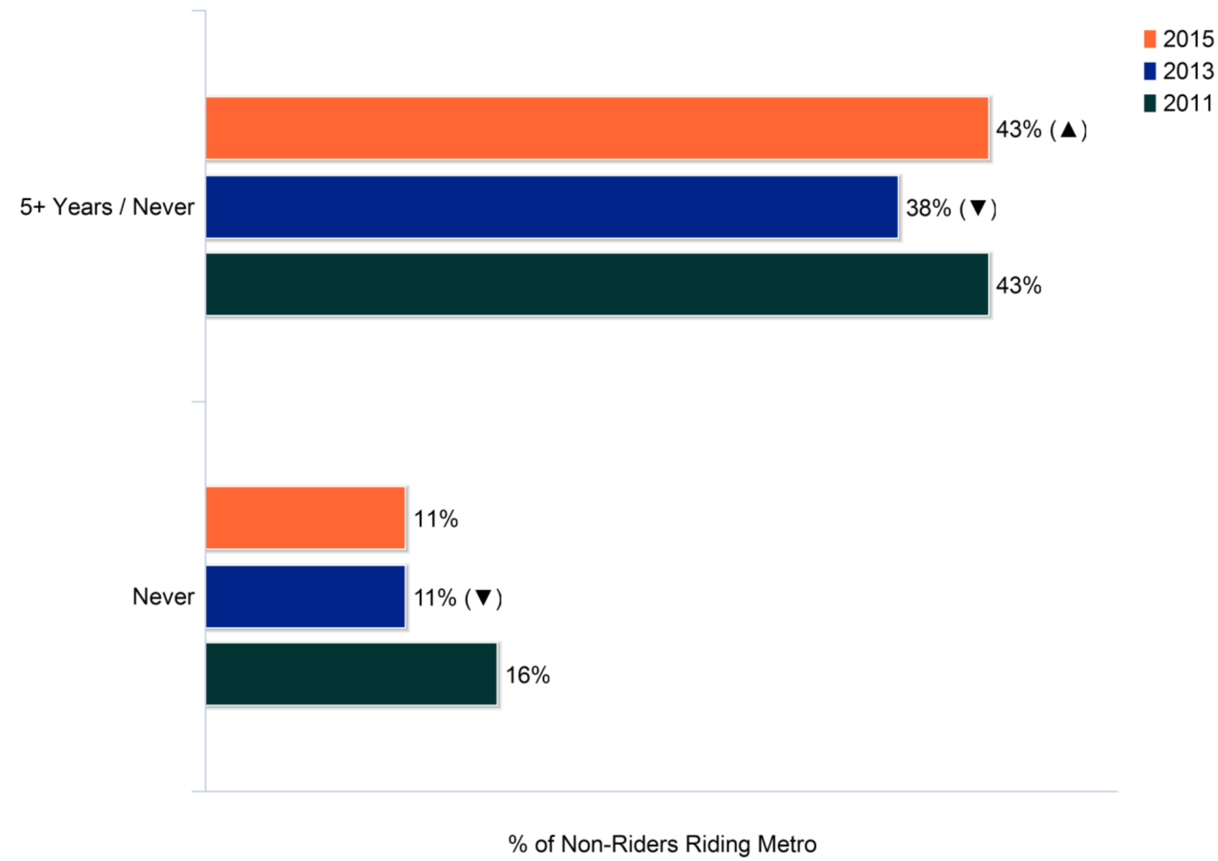
Just over two out of five Non-Riders have never ridden Metro or rode five or more years ago.

While the percentage of long-ago riders increased between 2013 and 2015 (27% compared to 32%, respectively), the percentage who have never ridden dropped between 2011 and 2013 and remained unchanged in 2015.

More than half of South King County Non-Riders have never ridden Metro or have not ridden within the past five years.

	% of Non-Riders	
	Who Have Never Ridden	Ridden, but not in Past 5 Years
Seattle / North King	5%	26%
South King	15%	40%
East King	11%	24%

Figure 85: Percentage of Non-Riders Who Have Never Used or Used Metro 5 or More Years Ago



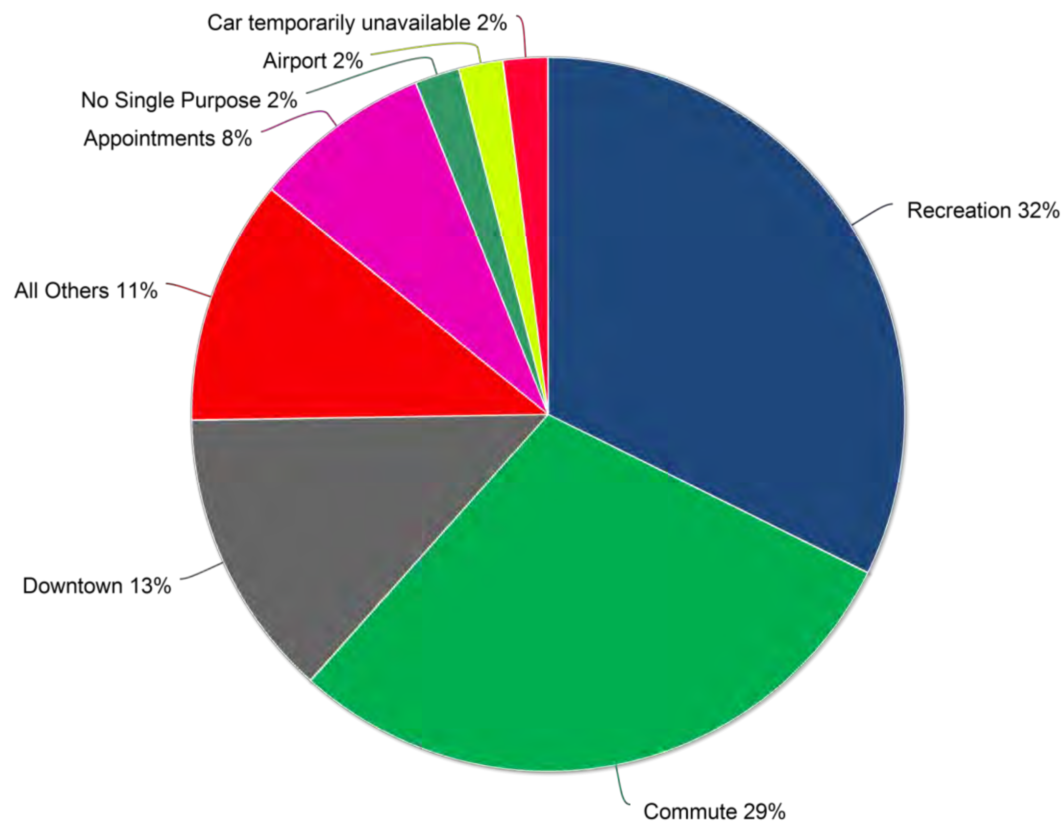
Questions: NON2 When was the last time you rode a Metro bus?

	Base: Non-Riders		
	2011	*2013*	*2015*
n	*1,066*	*1,019*	*815*
n_w	*1,828*	*1,522*	*1,207*

▲ / ▼ indicates a statistically significant change from previous year

The majority of Non-Riders who have ridden Metro are using the bus for non-commute trips. However, nearly three out of ten used Metro to commute to work or school.

Figure 86: Primary Purpose for Using Metro



Questions: NON2A When you rode Metro, what was the primary purpose of the trip you took most often??

	n	*n_w*
Base: Non-Riders Who Had Ridden Metro within 0 to 4 Years	*449*	*660*

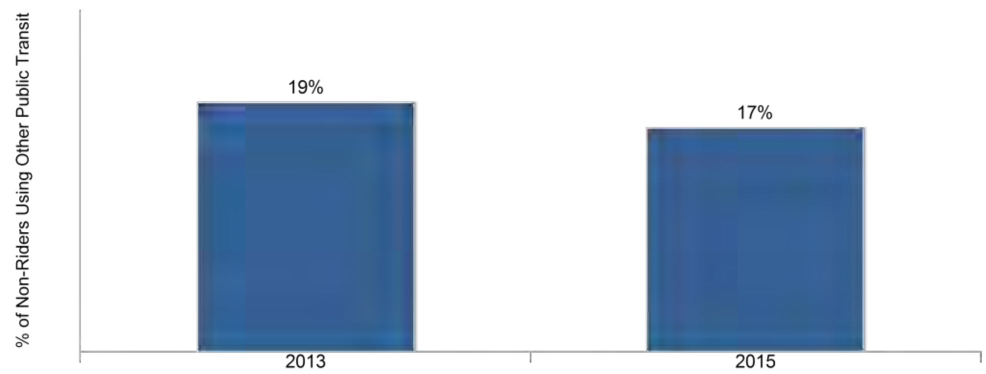
Other Transit Systems

One out of six Non-Riders have experience with other public transportation in the region.

Use of other transit systems in the region is highest among Non-Riders living in Seattle / North King County. Frequency of riding is relatively low.

	% of Non-Riders Riding Other Transit Systems (2015)	# of One-Way Trips in Past 30 Days (2015)
Countywide	17%	5.5
Seattle / N. King	27%	4.3
South King	18%	6.9
East King	11%	4.0

Figure 87: Non-Riders' Use of Other Transit Systems



Questions: NON1A Do you use any of the other public transportation services in the area?
Base: Non-Riders

	2013	2015
n	1,019	815
n_w	1,522	1,207

Non-Riders are most likely to ride Link Light Rail. This is noteworthy among those living in Seattle / North King and South King County where service is available.

Table 18: System(s) Used

	Countywide	Seattle / North King	South King	East King *
Link Light Rail	44.2%	54.8%	51.7%	9.5%
Washington State Ferries	16.9%	11.7%	14.0%	32.3%
Sound Transit Bus	15.2%	9.8%	5.6%	46.9%
Sounder Train	9.9%	0.7%	19.9%	0.0%
Community Transit	3.8%	7.1%	0.0%	7.6%
KC Water Taxi	3.4%	6.5%	2.8%	0.0%
Monorail	3.4%	7.7%	0.0%	4.8%

Questions: NON1B Which (public transportation service) do you use? Multiple responses allowed.
Base: Non-Riders Who Ride Other Transit

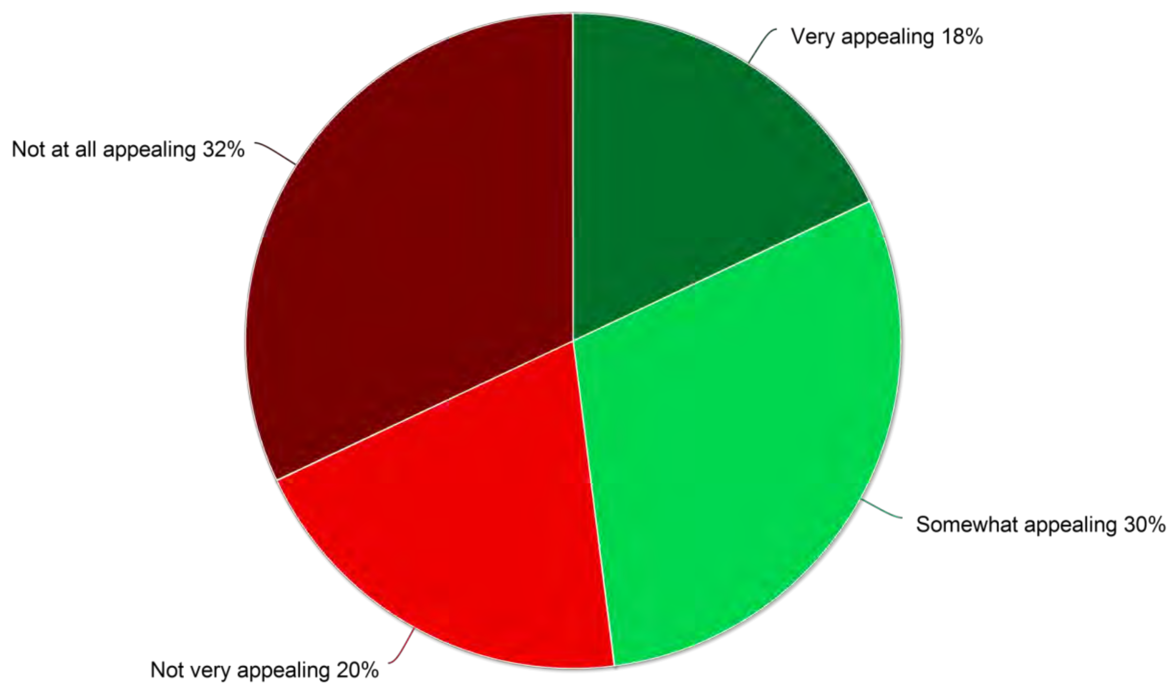
	Countywide	Seattle / North King	South King	East King* (small base)
n	133	53	56	24
n_w	202	64	98	40

Potential Ridership

Appeal of Using Metro

Non-Riders' views regarding the appeal of using Metro are decidedly mixed. However, while an equal percentage of Non-Riders say that riding Metro is appealing versus not appealing, nearly twice as many say it is not at all appealing compared to very appealing.

Figure 88: Appeal of Using Metro

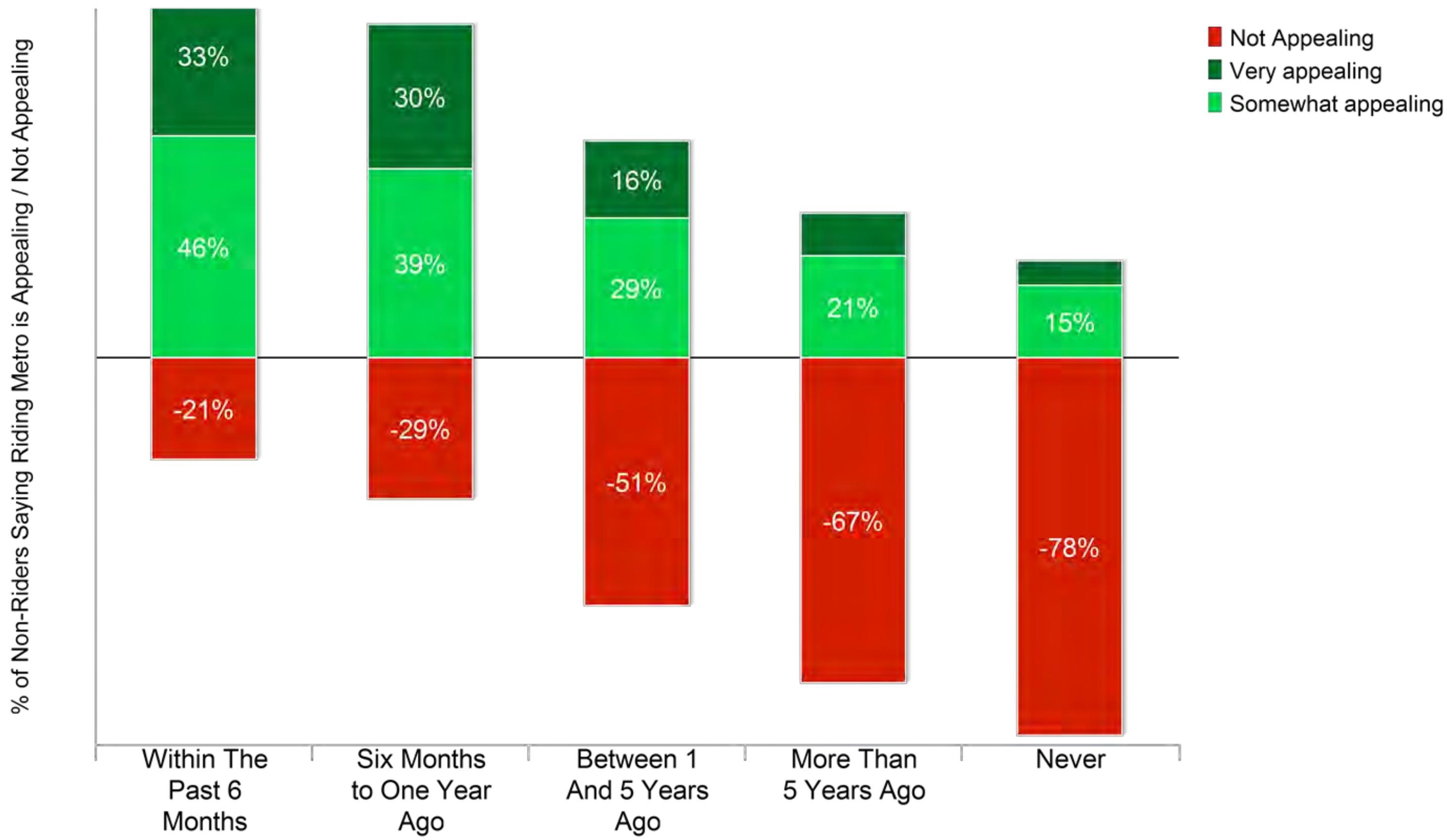


Questions: NON6A Overall, how appealing to you personally is the idea of using Metro?

	n	nw
Base: Non-Riders 2015	*815*	*1,207*

Non-Riders who have had recent experience (within the last year) with Metro are significantly more likely than those who have not ridden recently or who have never ridden to say the idea of using Metro is appealing.

Figure 89: Appeal of Using Metro by Past Use



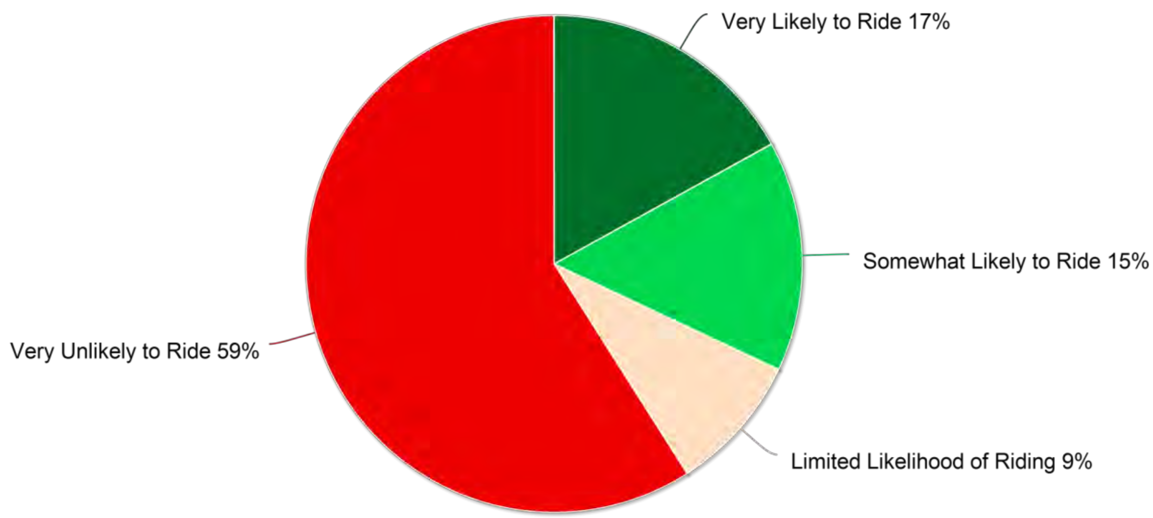
Questions: NON6A Overall, how appealing to you personally is the idea of using Metro?

	n	nw
Base: Non-Riders 2015	*815*	*1,207*

Likelihood of Riding

While nearly half (48%) of all Non-Riders said the idea of riding Metro is at least somewhat appealing, only one out of three (32%) stated they would be likely to ride.

Figure 90: Likelihood of Riding Metro

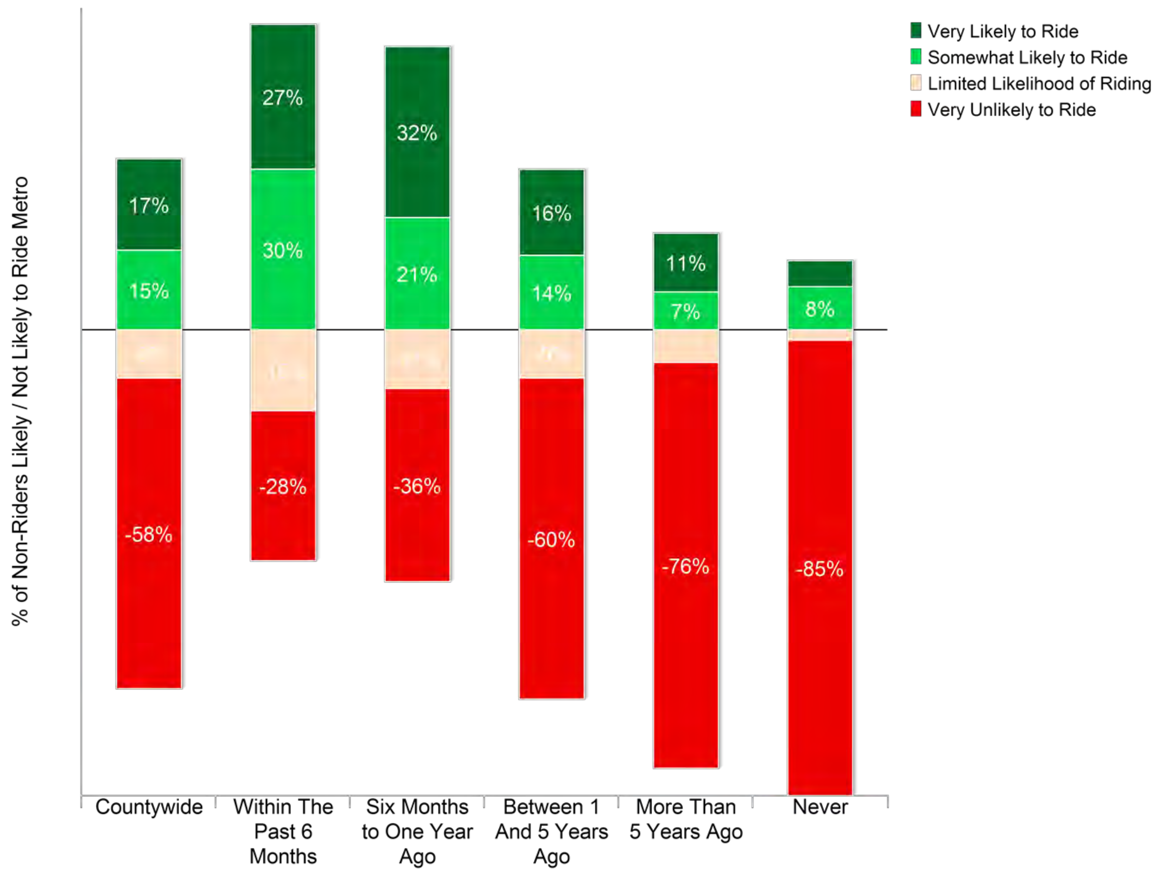


Questions: NON6B If convenient transit service was available to places you typically travel, how likely would you be to ride Metro? 11-point scale; 9 – 10 coded as "very likely" 7 – 8 coded as "somewhat likely" 4 – 6 coded as "limited likelihood" 0 – 3 or riding Metro is not at all appealing coded as "very unlikely"

	n	nw
Base: Non-Riders 2015	*815*	*1,207*

Non-Riders who have had recent experience (within the last year) with Metro are significantly more likely than those who have not ridden recently or who have never ridden to suggest they would be very or somewhat likely to ride.

Figure 91: Likelihood of Using Metro by Past Use



Questions: NON6A Overall, how appealing to you personally is the idea of using Metro?

	n	nw
Base: Non-Riders 2015	*815*	*1,207*

Most Important Improvement to Encourage Ridership

More frequent service was the most important improvement provided by all Non-Riders with at least some stated potential to use Metro.	Among Non-Riders with the highest potential, frequency coupled with direct service were mentioned most frequently.

Figure 92: All Potential Riders: Most Important Improvements to Encourage Ridership

Figure 93: Highest Potential Riders: Most Important Improvements to Encourage Ridership

Question: NON6C What is the single most important thing that Metro could do to increase your likelihood of using the bus for at least some of your travel?

	n	nw
Base: Non-Riders with some potential (6+ on 11-point scale)	*333*	*480*
Base: Non-Riders with high potential (9-10 on 11-point scale)	*142*	*203*

FINDINGS: RIDERS' AND NON-RIDERS' COMMUTE TRAVEL

Summary

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Commute Status</td>
<td>The current year (2015) saw a significant decrease in the percentage of Riders and Non-Riders who commute to work or school outside the home, three or more days per week.

This decrease is due almost entirely to a decrease in commuters among Non-Riders.</td>
<td>
<table>
<tr><th colspan="3">Riders & Non-Riders</th></tr>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><th colspan="3">Commuters</th></tr>
<tr><td>61%</td><td>63%</td><td>53%▼</td></tr>
<tr><th colspan="3">Non-Commuter</th></tr>
<tr><td>39%</td><td>37%</td><td>47%▲</td></tr>
<tr><td colspan="3">Significant increase (▲) or (▼) from previous year</td></tr>
</table>
<table>
<tr><th colspan="3">% Commuters</th></tr>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><th colspan="3">Riders</th></tr>
<tr><td>70%</td><td>71%</td><td>68%</td></tr>
<tr><th colspan="3">Non-Riders</th></tr>
<tr><td>58%</td><td>59%</td><td>46%▼</td></tr>
<tr><td colspan="3">Significant increase (▲) or (▼) from previous year</td></tr>
</table>
</td>
<td>The decrease in the percentage of Non-Riders who are commuters may in part reflect the increase in the percentage of Non-Riders who are older and retired.</td>
</tr>
<tr>
<td>Commute Mode</td>
<td>The percentage of King County commuters using Metro has increased significantly over the past five years. (Those using Metro for 50% or more of their commute trips are considered Metro Bus Commuters).

More than three out of four Regular Riders who are commuters use Metro to get to work—up 11 points from 2011.</td>
<td>
<table>
<tr><th colspan="3">Riders & Non-Riders Commute Mode</th></tr>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><th colspan="3">Metro Bus</th></tr>
<tr><td>16%</td><td>23%▲</td><td>27%▲</td></tr>
<tr><th colspan="3">Single Occupant Vehicle</th></tr>
<tr><td>63%</td><td>60%▼</td><td>52%▼</td></tr>
</table>
<table>
<tr><th colspan="3">Regular Riders Commute Mode</th></tr>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><th colspan="3">Metro Bus</th></tr>
<tr><td>66%</td><td>75%▲</td><td>77%</td></tr>
<tr><th colspan="3">Single Occupant Vehicle</th></tr>
<tr><td>11%</td><td>12%</td><td>10%</td></tr>
<tr><td colspan="3">Significant increase (▲) or (▼) from previous year</td></tr>
</table>
</td>
<td>The increase in use of Metro for commuting is consistent with recent analysis of Census data that found a significant increase in commuters using Metro ("Seattle Sees Biggest Jump in Bus Riders of Any U.S. City," Seattle Times, April 22, 2016.)

Increased access to transit and other alternative modes coupled with increasing congestion may be driving the decrease in single-occupant vehicle commuting.</td>
</tr>
</table>

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Work Location</td>
<td>More than one out of five commuters work in the downtown Seattle core—up significantly over the past five years. Nearly two out of five commuters work in downtown Seattle and the areas immediately surrounding downtown Seattle.

More than three out of five Metro bus commuters work within this concentrated area. However, most work within the core.</td>
<td>
<table>
<tr><th colspan="3">% of Commuters Working in Downtown Seattle Core</th></tr>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><th colspan="3">All Commuters</th></tr>
<tr><td>10%</td><td>17%▲</td><td>23%▲</td></tr>
<tr><th colspan="3">Metro Bus Commuters</th></tr>
<tr><td>27%</td><td>37%▲</td><td>46%▲</td></tr>
<tr><th colspan="3">% of Commuters Working in Surrounding Downtown Areas</th></tr>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><th colspan="3">All Commuters</th></tr>
<tr><td>16%</td><td>16%</td><td>16%</td></tr>
<tr><th colspan="3">Metro Bus Commuters</th></tr>
<tr><td>31%</td><td>20%▼</td><td>18%</td></tr>
<tr><th colspan="3">% of Commuters Working in DT Seattle Core & Surrounding Areas</th></tr>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><th colspan="3">All Commuters</th></tr>
<tr><td>26%</td><td>33%▲</td><td>39%▲</td></tr>
<tr><th colspan="3">Metro Bus Commuters</th></tr>
<tr><td>58%</td><td>57%</td><td>64%▲</td></tr>
</table>
</td>
<td>Metro's commuter segment is increasingly those who work in the heart of downtown Seattle. The addition of new services and realignment of existing services to better serve the areas surrounding the core may encourage greater use of Metro to commute to these areas.</td>
</tr>
<tr>
<td>Commute Mode by Major Work Location</td>
<td>More than half of commuters working in the heart of downtown Seattle use Metro to get to work—up significantly in the past five years.

The percentage of Metro bus commuters working at or near the University of Washington has also increased significantly.</td>
<td>
<table>
<tr><th colspan="3">Mode Share—Metro Bus</th></tr>
<tr><th>2011</th><th>2013</th><th>2015</th></tr>
<tr><th colspan="3">Downtown Seattle</th></tr>
<tr><td>43%</td><td>52%▲</td><td>54%</td></tr>
<tr><th colspan="3">Surrounding Downtown</th></tr>
<tr><td>32%</td><td>29%</td><td>30%</td></tr>
<tr><th colspan="3">University of WA</th></tr>
<tr><td>42%</td><td>45%▲</td><td>53%▲</td></tr>
<tr><th colspan="3">Downtown Bellevue</th></tr>
<tr><td>8%</td><td>16%</td><td>24%</td></tr>
</table>
</td>
<td>Availability of service to downtown Seattle and the University as well as high costs and/or availability of parking in these areas are most likely key factors in commuters' decision to use Metro.</td>
</tr>
</table>

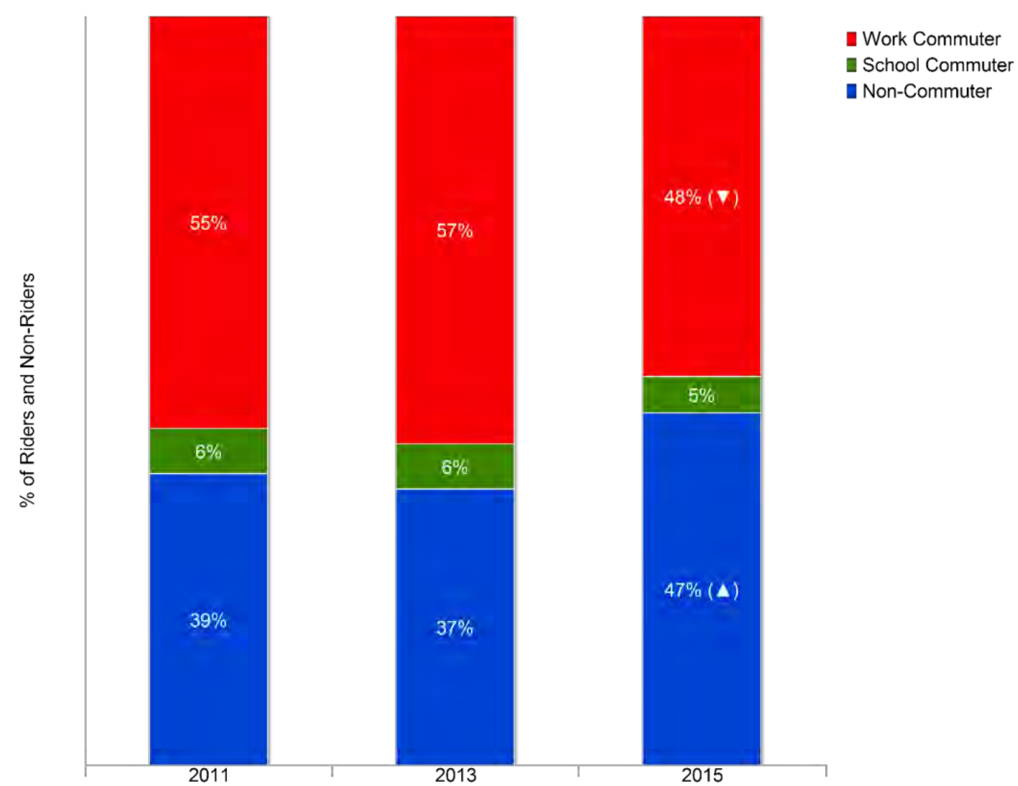
Commute Status

Respondents are classified as Commuters versus Non-Commuters based on the number of days per week they commute to work or school outside the home. Commuters are defined as those employed full or part-time or students who commute to a fixed worksite or school at least three days per week by any mode.

Just over half (53%) of all Riders and Non-Riders are commuters—that is, work or go to school outside their home three or more days per week.

This figure is significantly lower than in previous years.

Figure 94: Commuter Status



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

Base: All Respondents

	2011	2013	2015
n	2,521	2,414	1,840
n_w	2,521	2,414	1,840

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

Riders are significantly more likely than Non-Riders to be commuters.

- The percentage of Riders who are commuters has not varied significantly over the years.

The decrease in the percentage of all commuters is due almost entirely to a decrease in commuters among Non-Riders.

- Currently, less than half of all Non-Riders are commuters.

Figure 95: Riders' Commuter Status

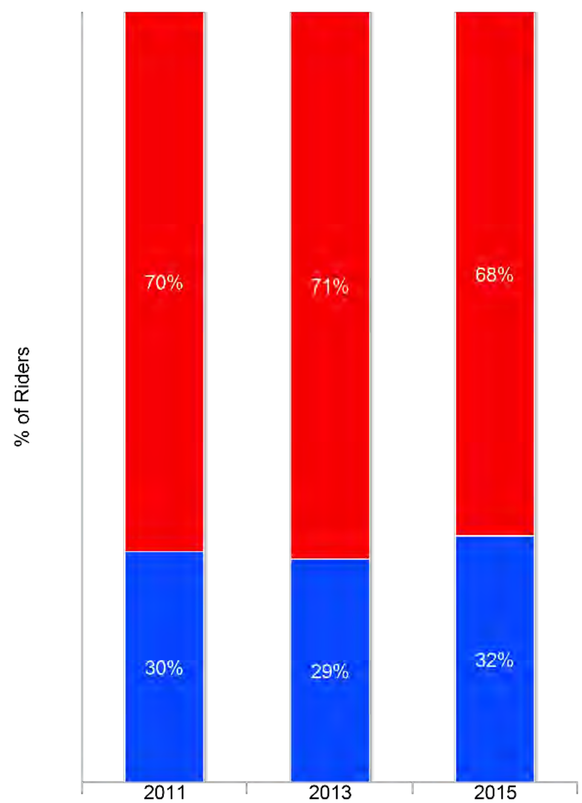
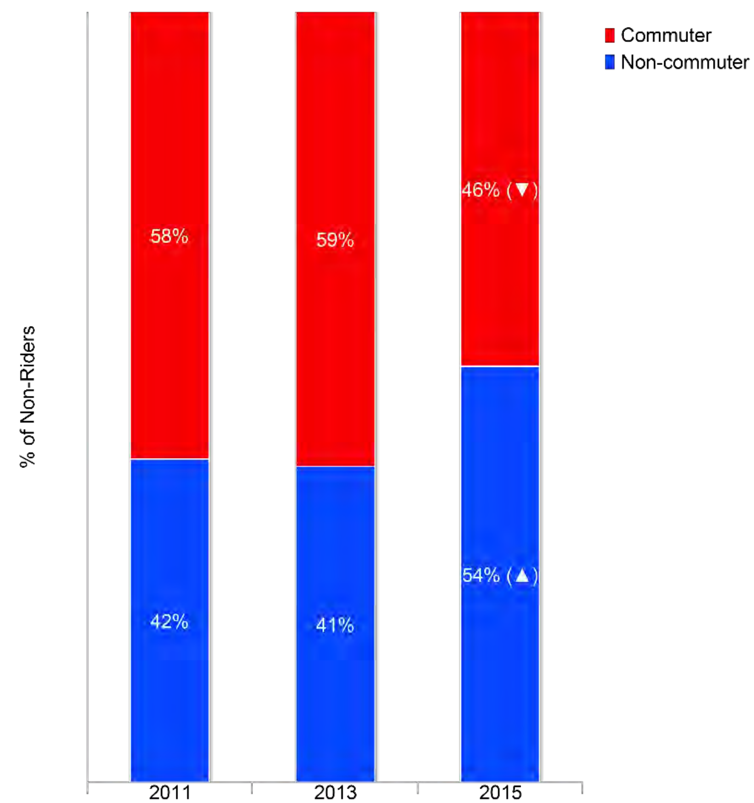


Figure 96: Non-Riders' Commuter Status



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

Base: Regular and Infrequent Riders

	2011	2013	2015
n	*1,455*	*1,395*	*1,025*
n_w	*1,455*	*1,395*	*1,025*

▲ / ▼ indicates a statistically significant change from previous year

Base: Non-Riders

	2011	2013	2015
n	*1,066*	*1,019*	*815*
n_w	*1,066*	*1,019*	*815*

▲ / ▼ indicates a statistically significant change from previous year

Telecommuting

We see a significant increase in the percentage of Riders and Non-Riders who are employed but do not work outside the home three or more days per week. This decrease is evident for both Riders and Non-Riders but is greater for Non-Riders.

Similarly, there has been a significant decrease in the number of days employed Non-Riders commute to a worksite outside their home.

Figure 97: Trends in Work at Home Status

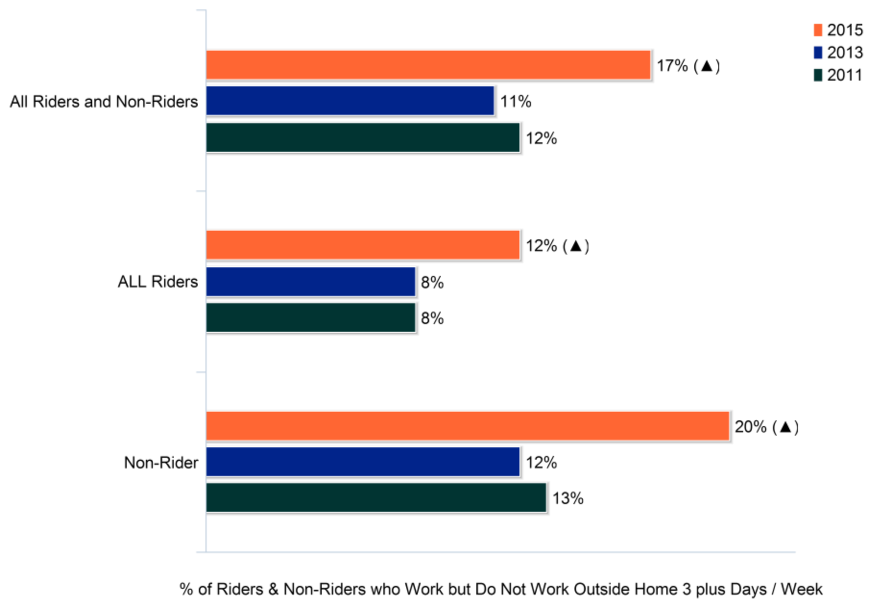
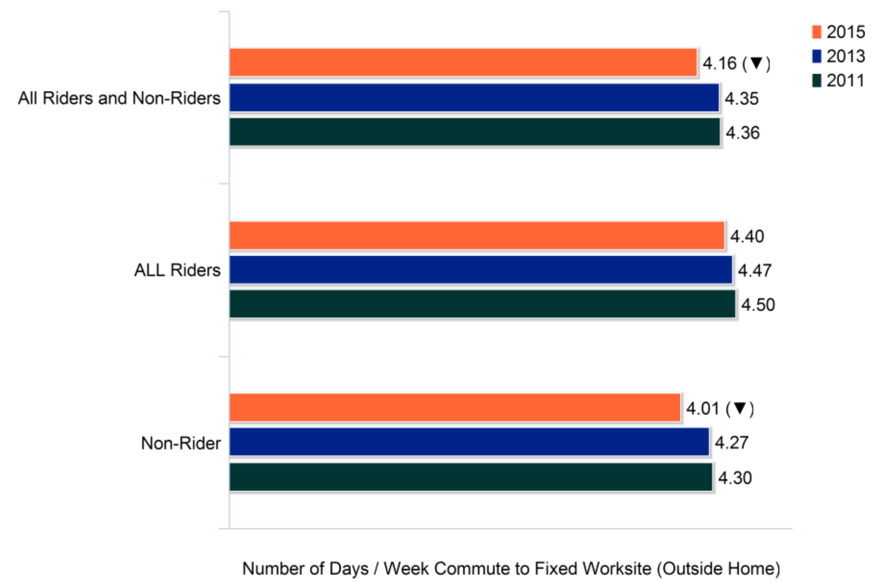


Figure 98: Trends in Number of Days Commuting



CS2B/3B How many days a week do you travel to work, that is, you work outside your home / attend school?

Riders and Non-Riders who are Employed

	Riders and Non-Riders			*Riders*			*Non-Riders*		
	2011	*2013*	*2015*	*2011*	*2013*	*2015*	*2011*	*2013*	*2015*
n	*1,567*	*1,492*	*1,090*	*936*	*897*	*677*	*631*	*595*	*413*
n_w	*1,575*	*1,561*	*1,076*	*445*	*601*	*420*	*1,130*	*960*	*655*

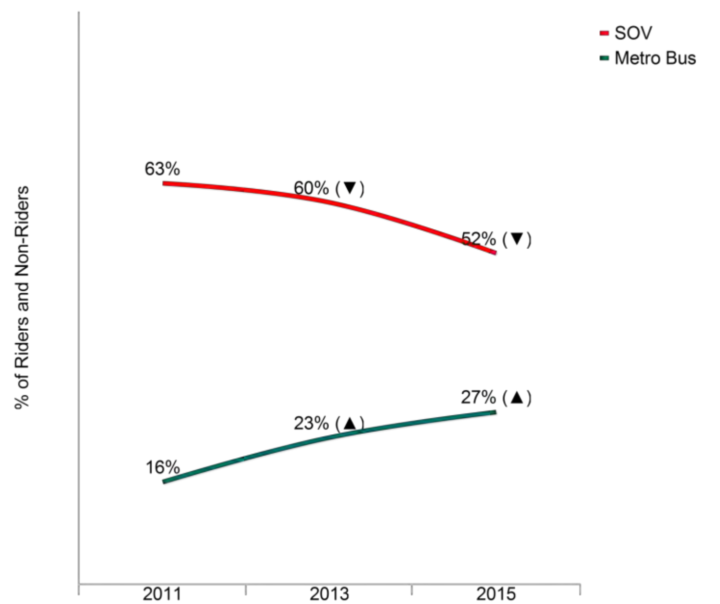
▲ / ▼ *indicates a statistically significant change from previous year*

Commute Mode

Overall

The percentage of surveyedcommuters using Metro has increased steadily over the past five years.

Figure 99: Primary Commute Mode Riders and Non-Riders



Question: C4B How do you typically get to work or school? Does not sum to 100%; other modes not included.

Base: All Commuters (Riders & Non-Riders)

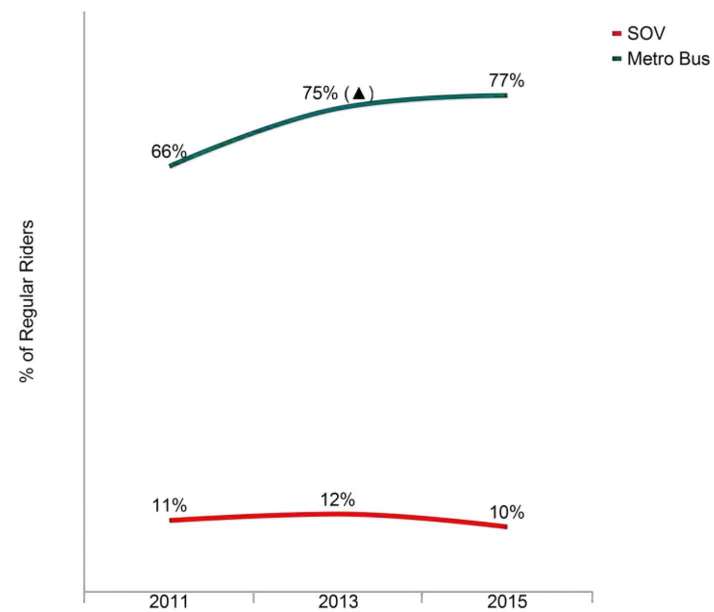
	2011	2013	2015
n	1,567	1,492	1,090
n_w	1,575	1,561	1,076

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

More than three out of four Regular Riders use Metro to commute to work or school, up significantly from 2011.

- The percentage of Regular Riders using Metro to commute to work or school has increased by 11 percentage points.

Figure 100: Primary Commute Mode Regular Riders



Question: C4B How do you typically get to work or school? Does not sum to 100%; other modes not included.

Base: Commuters who are Regular Riders

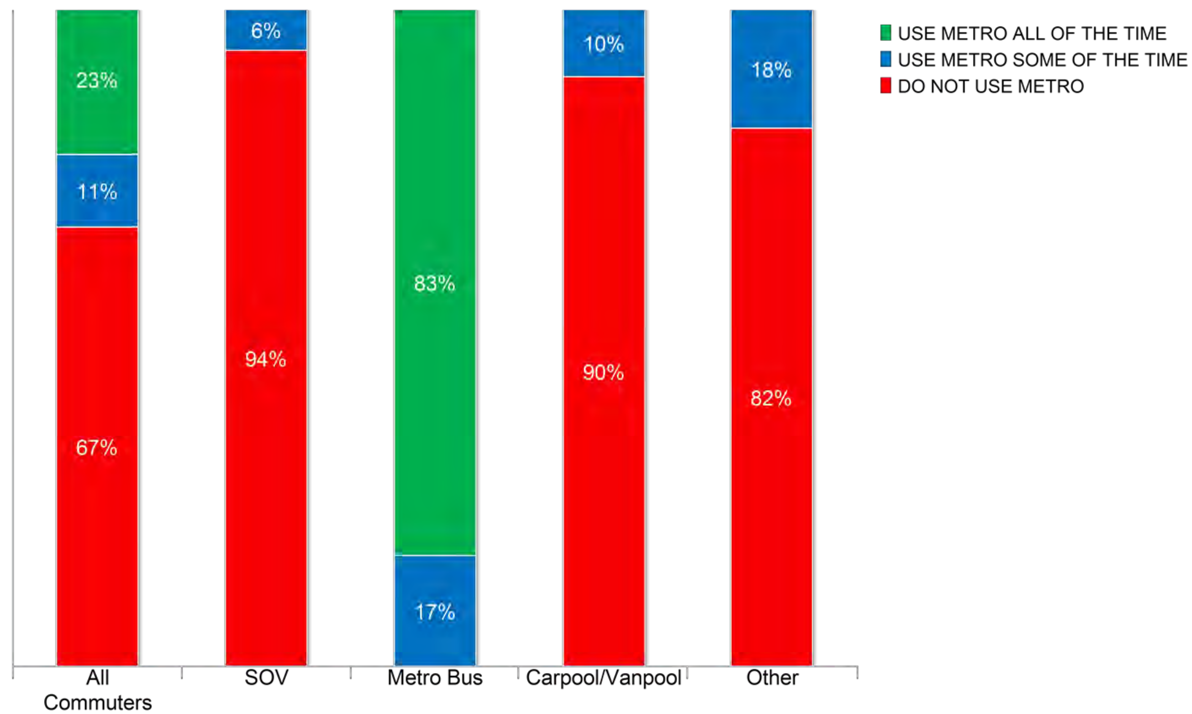
	2011	2013	2015
n	850	617	639
n_w	691	514	472

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

Commuters do not use the same mode every day. A variable was computed based on the number of days an individual respondent works and the number of days they use Metro to get to work. Those who primary mode is Metro bus use Metro to get to work a minimum of half of the days they work.

- Nearly one out of four commuters use Metro for all of their commute trips.
- More than four out of five (83%) Metro bus commuters commute to work or school by bus every day they work. The balance use Metro at least half of the days they work but use other modes as well.

Figure 101: Use of Metro for Commuting by Primary Commute Mode (2015)



Base: Commuters 2015

	All Commuters	*SOV*	*Metro Bus*	*Carpool / Vanpool*	*Other*
n	*1,009*	*325*	*534*	*56*	*94*
n_w	*896*	*471*	*244*	*77*	*105*

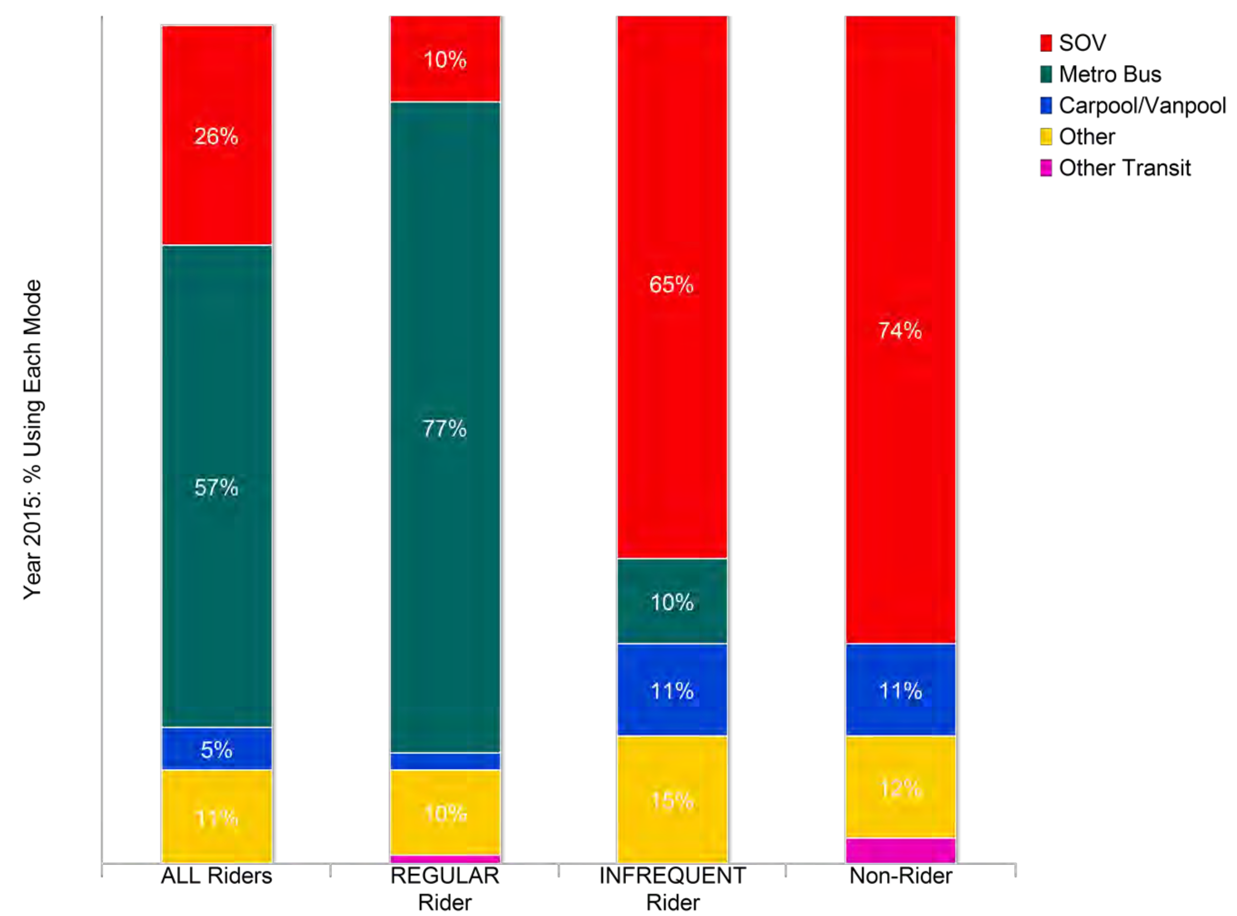
Those using other transit are not included as base size was too small (n <25).

Commute Mode by Frequency of Riding

As would be expected, commute mode varies between Riders and Non-Riders but also between Regular and Infrequent Riders.

- More than three out of four Regular Riders use Metro to commute to work.

Figure 102: Commute Mode (2015) by Frequency of Riding



Base: Commuters 2015

	All Riders	Regular Riders	Infrequent Riders	Non-Riders
n	712	655	57	308
n_w	425	299	126	485

Demographic Characteristics of Riders Driving Alone versus Metro Bus (Primary Commute Mode)

There are surprisingly few demographic differences between commuters who drive alone to work and those using Metro.

- The primary distinguishing characteristics is access to a vehicle combined with income. Notably those without or limited access to a vehicle (one vehicle in the household) using Metro to commute to work are more likely to be low income (<$35,000) or high income ($100,000 plus).

Table 19: Demographics: Commute Mode

	SOV (n=307; n_w=440)	METRO (n=532; n_w=242)
GENDER		
MALE	52%	53%
FEMALE	48%	47%
AGE		
16 –34	32%	42%
35 –54	45%	40%
55+	23%	18%
MEAN	42.6	38.8
EMPLOYMENT STATUS		
EMPLOYED	97%▲	85%▼
STUDENT	3%▼	15%▲
INCOME		
<$35K	7%▼	22%▲
$35K–<$55K	16%	18%
$55K–<$75K	15%▲	12%▼
$75K–<$100K	17%	17%
$100K+	45%▲	32%▼
MEDIAN	$93,056	$74,200
HH COMPOSITION		
% SINGLE-PERSON	20%	18%
AVERAGE HH SIZE	2.71	2.79
RACE/ETHNICITY		
CAUCASIAN ALONE	66%	61%
ASIAN ALONE	19%	15%
BLACK ALONE	2%▼	9%▲
HISPANIC	6%	8%
MIXED RACE / OTHER	6%	7%
VEHICLE ACCESS		
% W/ LICENSE	100%▲	79%▼
% W/ VEHICLES	100%▲	86%▼
MEAN # VEHICLES	2.32	1.66

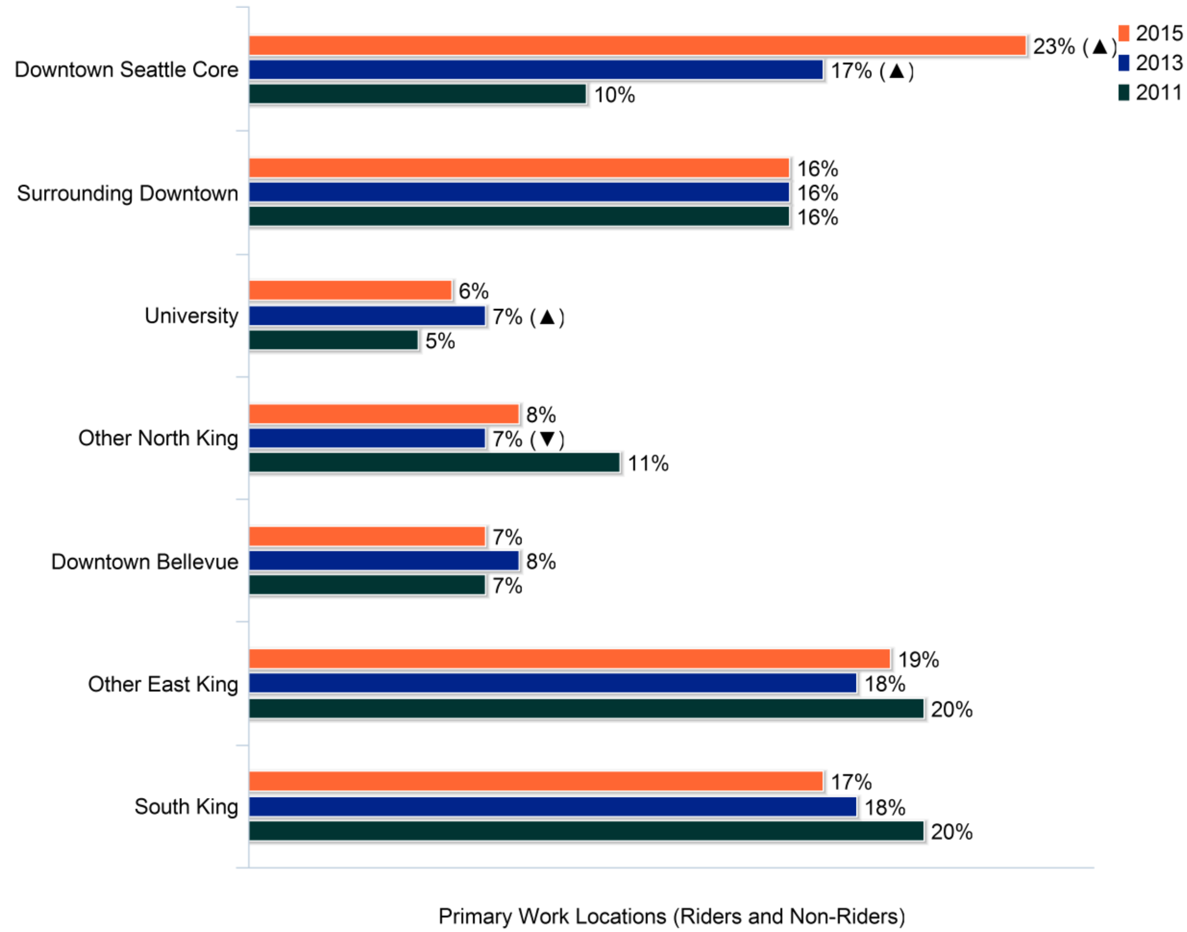
Base: Commuters; Year: 2015
▲ / ▼ indicates a statistically significant difference between respondent groups
Columns may sum to more or less than 100% due to rounding

Work Location

Downtown Seattle is the destination for the largest percentage (23%) of surveyed commuters, up significantly from 2011.

Coupled with the area immediately surrounding downtown, nearly two out of five (39%) commuters currently work in or immediately around the downtown core (South Lake Union, Pioneer Square, Belltown, International District, Capitol Hill, First Hill, Denny Regrade, and SODO).

Figure 103: Work Location



Question: C1 In what geographic area do you work / attend school?

Base: All Commuters

	2011	2013	2015
n	1,616	1,484	1,027
n_w	1.533	1,517	931

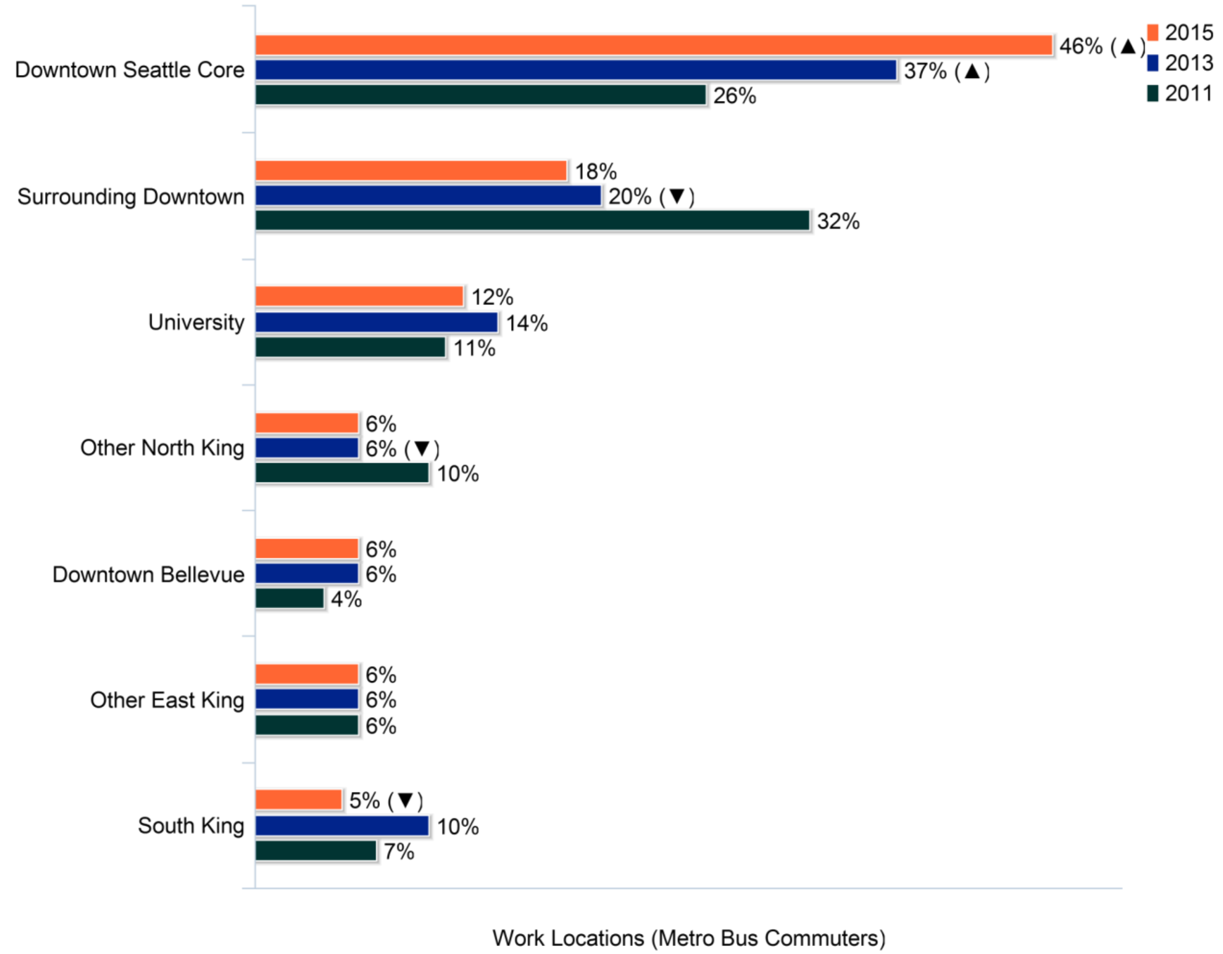
▲ / ▼ *indicates a statistically significant change from previous year*

Metro Bus Commuters' commute destination is increasingly concentrated in downtown Seattle.

- Nearly half of all Metro Bus Commuters currently work in the Downtown Seattle core. This number has increased by 20 percentage points since 2011.

Combined with the destinations immediately surrounding downtown Seattle, nearly two out of three (64%) Metro Bus Commuters work within these major destination zones.

Figure 104: Work Location Metro Bus Commuters



Question: C1 In what geographic area do you work / attend school?

Base: Metro Bus Commuters

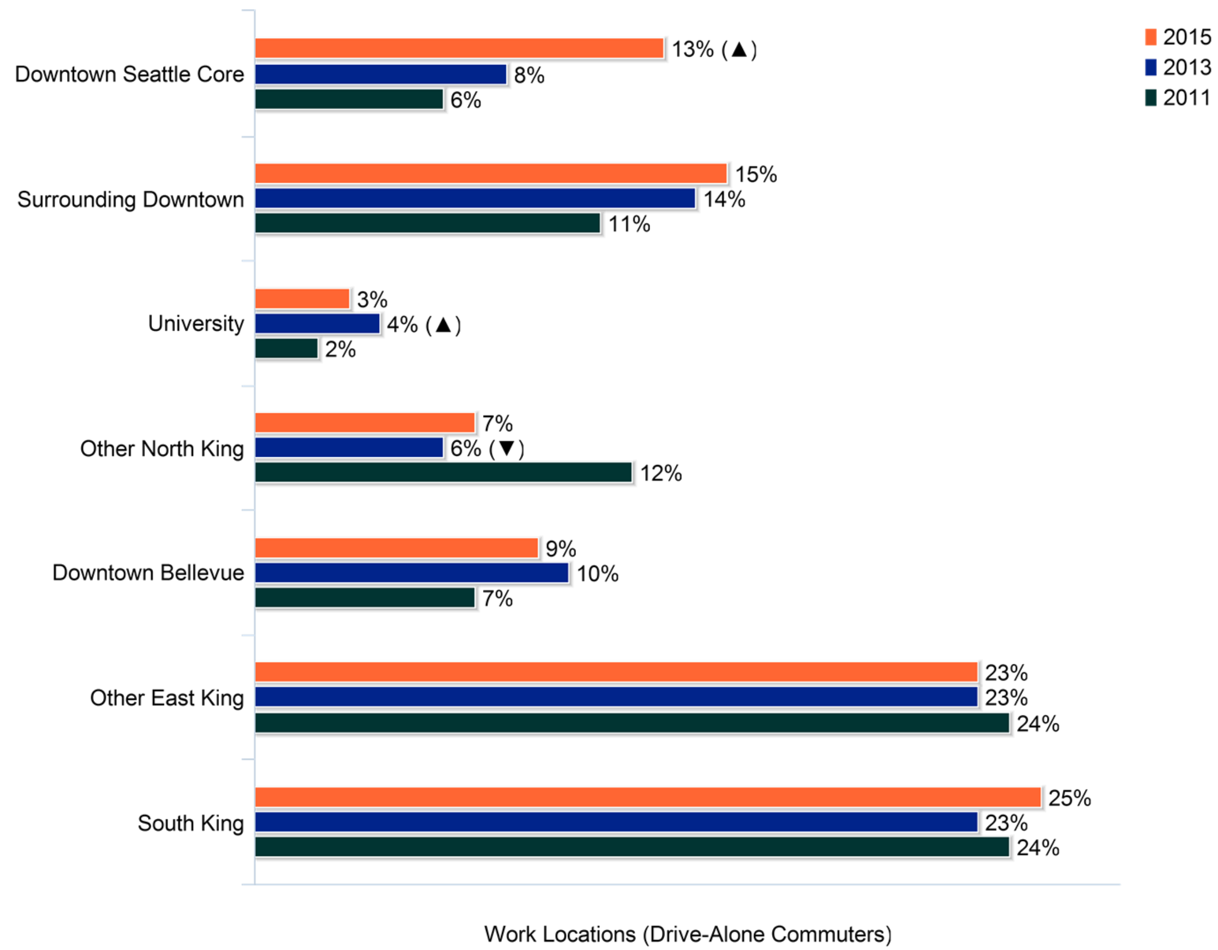
	2011	2013	2015
n	633	679	524
n_w	487	553	388

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

More than one out of four (28%) drive-alone commuters work in downtown Seattle or the area immediately surrounding the downtown core. This is up significantly from 2011 when just 17 percent of drive-alone commuters work in these two areas.

This is significantly less than the 64 percent of Metro Bus Commuters who work within this concentrated area.

Figure 105: Work Location Drive-Alone Commuters



Question: C1 In what geographic area do you work / attend school?

Base: Drive-Alone Commuters

	2011	2013	2015
n	637	590	307
n_w	971	903	440

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

Downtown Seattle and the University have the highest percentage of surveyed commuters using Metro.

- Among commuters working in downtown Seattle the share using Metro increased significantly between 2011 and 2013. The percentage increased again in 2015 but that increase was not significant.
- Among commuters working in the University area, the share using Metro has increased each year and is significantly higher than in 2011.

	% Commute by Metro Bus		
	2011	**2013**	**2015**
DT Seattle Core	43%	52% ▲	54%
Surrounding DT	32%	29%	30%
University of WA	40%	45% ▲	53% ▲
DT Bellevue	8%	16%	24%

Table 20: Mode Share by Work Location

	Downtown Seattle Core	Surrounding Downtown	University	Other North King	Downtown Bellevue	Other East King	South King
Base size	*308*	*165*	*79*	*66*	*67*	*137*	*130*
Metro Bus	54%	30%	53%	23%	24%	9%	8%
SOV	28%	45%	27%	48%	63%	63%	73%
Carpool / Vanpool	5%	5%	9%	14%	9%	12%	11%
Other Transit	4%	0%	0%	0%	0%	4%	0%
Other	9%	20%	12%	15%	4%	12%	8%

Potential Use of Metro to Commute to Work or School

Among commuters who do not use Metro, the appeal of commuting by bus is mixed.

- While nearly two out of five (38%) say it is at least somewhat appealing, a similar number say it is not at all appealing.

The percentage of commuters stating that the idea of using Metro to get to work or school is appealing decreased from 2011 and 2013—from 44 percent appealing to 38 percent.

- The percentage saying that it not appealing increased from 54-55 percent to 59 percent.

It is noteworthy that the percentage increase in the "not appealing" responses is smaller than the percentage decrease in the percentage of appealing responses, indicating that a greater percentage have neutral opinions.

Figure 106: Overall Appeal of Using Metro to Commute to Work or School

Question: C10A Overall, how appealing to you personally is the idea of ***using*** *Metro to get to work / school?*
Columns sum to less than 100%, neither appealing nor unappealing not shown

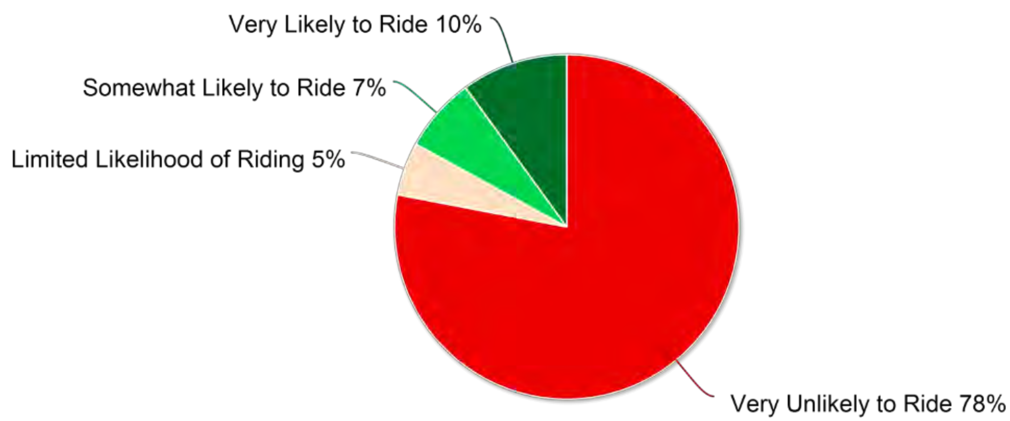
Base: Commuters who do not use Metro for their commute trip

	2011	2013	2015
n	861	798	422
n_w	1,236	1,155	609

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

One out of six (17%) commuters who do not use Metro suggest they are at least somewhat likely to consider riding.

Figure 107: Likelihood of Using Metro to Commute to Work or School



*Question: C10A _1 If **convenient transit service** was available to where you would [work/go to school], how likely would you be to **ride** Metro?*

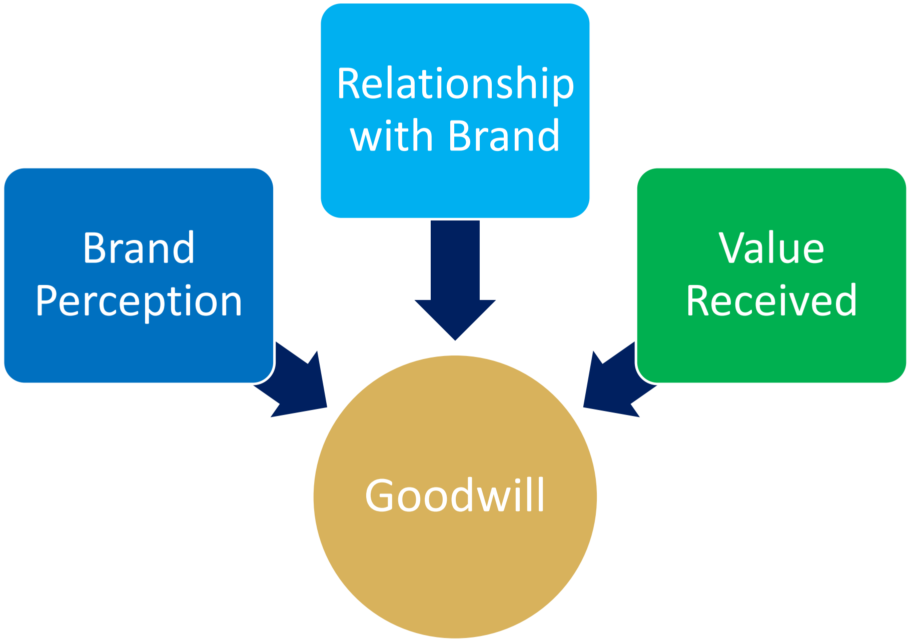
	Base: Commuters who do not use Metro for their commute trip: 2015
n	*422*
n_w	*609*

FINDINGS: GOODWILL

Goodwill is a measure of how well Metro delivers to and emotionally engages its Riders and the communities it serves. A high reservoir of goodwill ensures higher support for Metro plans and policies. High goodwill also ensures that Metro has support to draw on during tough times (e.g., service cuts, extreme weather, etc.). Overall goodwill is measured by the extent to which Riders and Non-Riders have expectations of Metro and believe that Metro provides high quality service. Goodwill is comprised of three primary components:

Brand Perception: Brand Perception is the portion of goodwill attributable to the Riders' and Non-Riders' subjective and intangible perceptions of Metro (above and beyond its objectively perceived value). This evaluation is shaped by direct experience, external influences, and Metro's communications strategies. For Riders and Non-Riders, the main drivers of Brand Perception are:

- Awareness, which is heavily influenced by the media and word-of-mouth, and
- Perceptions of the quality of service provided such as the extent to which the agency has high standards for the quality of service provided, provides excellent customer service, and is innovative.



In addition, Riders' direct experiences, as reflected by their satisfaction with service, are included in this component.

Brand Relationship: Brand Relationship is the extent to which Riders and Non-Riders are emotionally attached to Metro and goes beyond the objective and subjective assessments of Metro that are part of Brand Perception. For Riders and Non-Riders this is measured by the extent to which they agree that they:

- Like and respect Metro,
- Trust Metro, and
- Believe that Metro values it customers.

Among Riders, the extent to which they like to say they ride Metro is also included.

Value: Value is the objective assessment of the utility of the services Metro provides based on perceptions of what is forgone for what is received. For the purposes of this research, value is measured by the extent to which Riders and Non-Riders agree that Metro provides good value for the quality of service provided and that Metro values its customers.

Summary

Topic	What We Found	What It Means
Meeting Expectations	The majority of Riders and Non-Riders expect high quality services from Metro and are generally positive or confident in Metro's ability to deliver to these expectations. Regular Riders are the most likely to have high expectations for quality and be confident in Metro's ability to deliver. Infrequent Riders are more likely to suggest that they are generally positive rather than fully confident. While the majority of Non-Riders have high expectations of Metro, one out in six (16%) have low expectations and low confidence.	The extent to which Riders and Non-Riders have high expectations of Metro and believe that Metro provides high quality service is a measure that goes beyond satisfaction and factors in the theory of disconfirmation which examines the extent to which the outcome—delivered service—meets or contradicts expectations. Riders experiencing disconfirmation—that is, service does not meet their expectations—may be willing to expend additional effort in order to have service that meets their needs and expectations. However, that additional effort could result in lower satisfaction. Alternatively, they may lower their expectations which then decreases goodwill and support for riding. Non-Riders will consider riding if they believe their expectations can be met; and they will support Metro if they feel the quality of service provided adds value to the community.

	Expect High Quality and are. . .		
	Confident*	**Positive****	**Total**
2013	18%	45%	63%
2015	18%	43%	61%
	2015		
All Riders	20%	48%	68%
Regular Riders	24%	45%	69%
Infreq. Riders	12%	53%	65%
Non-Riders	16%	41%	57%

* *I have high expectations of Metro and I am confident that they will continue to provide the best service possible*

** *I generally expect high quality service from Metro and I am generally confident that they will provide high quality service*

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr>
<td>Brand Perception</td>
<td>The majority of Riders and Non-Riders agree that Metro provides excellent customer service and has high standards for service. However, strength of that agreement decreased in 2015 due to a decrease in the percentage who somewhat agree.

Riders and Non-Riders are less likely to agree that Metro is innovative. Moreover, the percentage saying that Metro is NOT innovative has increased—from 25% to 32%, respectively.</td>
<td><table>
<tr><th></th><th colspan="2">% Agree</th></tr>
<tr><th></th><th>2013</th><th>2015</th></tr>
<tr><td>Has High Standards for Service</td><td>80%</td><td>74% ▼</td></tr>
<tr><td>Provides Excellent Customer Service</td><td>78%</td><td>72% ▼</td></tr>
<tr><td>Is Innovative</td><td>65%</td><td>56% ▼</td></tr>
</table></td>
<td>Metro should investigate what factors underlie the erosion in Riders' and Non-Riders' perceptions of its focus on quality levels of service and customer service.

In addition, Metro should communicate new innovations that have been introduced, such as real-time information at stops, new electric trolley buses coming into service, TripPool, etc. In addition, Metro should focus on additional innovations notably in the areas of fare payment.</td>
</tr>
<tr>
<td>External Influences and Brand Perception</td>
<td>While the majority of Riders and Non-Riders hear positive things about Metro from their friends and colleagues and, to a somewhat lesser extent, in the media, a significant percentage hear negative comments. This is noteworthy among Infrequent Riders.

On a positive note, the extent to which Riders and Non-Riders disagree that they hear positive things about Metro has decreased significantly.</td>
<td><table>
<tr><th></th><th colspan="2">% Agree</th></tr>
<tr><th>Hear Good Things. . .</th><th>2013</th><th>2015</th></tr>
<tr><td>From Friends and Colleagues</td><td>61%</td><td>60%</td></tr>
<tr><td>In the Media</td><td>56%</td><td>58%</td></tr>
<tr><td></td><td colspan="2">% Disagree</td></tr>
<tr><td>From Friends and Colleagues</td><td>30%</td><td>25% ▼</td></tr>
<tr><td>In the Media</td><td>37%</td><td>31% ▼</td></tr>
</table></td>
<td>Metro should continue to work on improved media relations to publicize positive news about the system. Social media channels can also be extremely effective in countering negative comments.</td>
</tr>
</table>

<table>
<tr><th>Topic</th><th colspan="2">What We Found</th><th>What It Means</th></tr>
<tr><td>Brand Relationship</td><td>The majority of Riders and Non-Riders have a strong Brand Relationship with Metro.

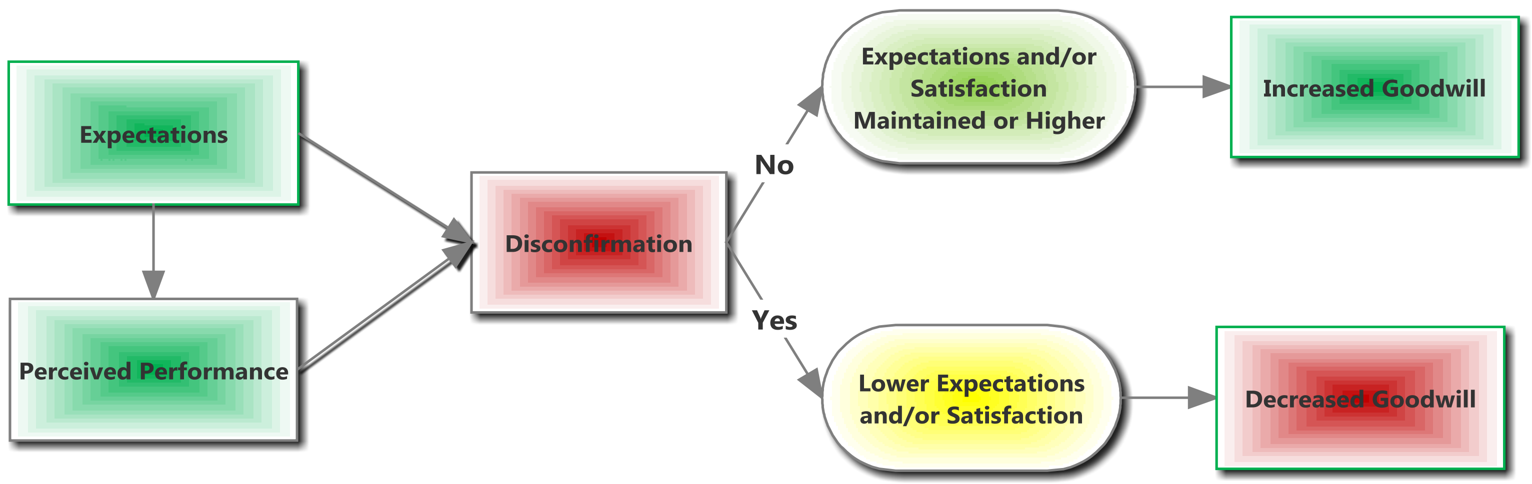
The strength of these associations weakened somewhat due to a decrease in the percentage of Riders, notably Infrequent Riders, who somewhat agree with these statements.</td><td>
<table>
<tr><th></th><th colspan="2">% Agree</th></tr>
<tr><th></th><th>2013</th><th>2015</th></tr>
<tr><td>Like and Respect</td><td>82%</td><td>78%</td></tr>
<tr><td>Trust</td><td>82%</td><td>78%</td></tr>
<tr><td>Values its Customers</td><td>85%</td><td>81%</td></tr>
<tr><td>Like to Say I Ride Metro (Riders Only)</td><td>80%</td><td>74%</td></tr>
</table>
</td><td>As with Brand Perception, Metro should investigate what could be contributing to the somewhat weaker ratings among those who have less of a relationship with Metro, for example Infrequent Riders.</td></tr>
<tr><td>Value</td><td>As with the other aspects of goodwill, the majority of Riders and Non-Riders continue to agree that Metro provides good value for the level of services it provides. However, the strength of that agreement is weakening, notably among Infrequent Riders and Non-Riders.</td><td>
<table>
<tr><th colspan="3">Value of Services</th></tr>
<tr><th></th><th>2013</th><th>2015</th></tr>
<tr><td>Total Agree</td><td>85%</td><td>80% ▼</td></tr>
<tr><td>Strong Agree</td><td>40%</td><td>43%</td></tr>
<tr><td>Somewhat Agree</td><td>45%</td><td>37% ▼</td></tr>
<tr><td>Disagree</td><td>11%</td><td>13% ▲</td></tr>
</table>
</td><td>Recent fare increases combined with service cuts in both 2014 and 2015 may have contributed to the slight erosion in perceived value of services provided.</td></tr>
</table>

Goodwill	Regression analysis was used to determine the extent to which the individual elements of Brand Perception and Brand Relationship affect the extent to which Riders and Non-Riders have high expectations of Metro and believe that Metro provides high quality service. The coefficients from this analysis were used to compute weighted indices reflecting overall Brand Perception and Brand Relationship. A similar analysis was then used to determine the extent to which the two overall indices (Brand Perception and Brand Relationship) **<u>and</u>** ratings for the value of service received contributes to the extent to which Riders and Non-Riders have high expectations of Metro and believe that Metro provides high quality service. The results from this analysis was used to develop an overall Goodwill Index. Metro has a moderately high level of goodwill. Improving perceptions of the brand (i.e., what they hear about and feel about Metro) would have the greatest impact on overall goodwill. Riders, notably Regular Riders, have a higher Goodwill Index than do Non-Riders.	**Overall** **Brand Perception** 3.68 ↘ · **Brand Relationship** 4.00 ↓ · **Value** 4.05 ↙ **Goodwill** 3.83 **Riders** **Perception** 3.86 ↘ · **Relationship** 4.18 ↓ · **Value** 4.24 ↙ **Goodwill** 3.94 **Non-Riders** **Perception** 3.56 ↘ · **Relationship** 3.89 ↓ · **Value** 3.95 ↙ **Goodwill** 3.75 **Regular Riders** **Perception** 3.89 ↘ · **Relationship** 4.27 ↓ · **Value** 4.24 ↙ **Goodwill** 3.96 **Infrequent Riders** **Perception** 3.80 ↘ · **Relationship** 4.03 ↓ · **Value** 4.24 ↙ **Goodwill** 3.90	Metro can improve its Goodwill Index through positive messaging to key targets. Notably, Non-Riders' Brand Relationship can be most improved by increasing the extent to which they like and respect Metro. Infrequent Riders' Brand Relationship can be improved by increasing the extent to which they say they like to ride. Non-Riders' Brand Perception can be most improved by increasing the extent to which they are aware of and believe that Metro provides excellent customer service. Infrequent Riders need to be convinced that Metro has high standards for the quality of service it provides.

Meeting Expectations

A transit agency is only as good as its Riders' and Non-Riders' assessment and expectation of the agency. Therefore, in 2013 a question was added to measure the extent to which Metro meets Riders' and Non-Riders' expectations for service. This question builds on the theory of disconfirmation which examines the extent to which the outcome—delivered service—meets or contradicts expectations.

- Riders experiencing disconfirmation—that is, service does not meet their expectations—may be willing to expend additional effort—for example take an earlier bus or change routes to take a less crowded bus—in order to have service that meets their needs and expectations. However, this is likely to lead to lower overall satisfaction. Alternatively, Riders may lower their expectations, which then decreases goodwill towards the agency and they may stop riding and/or ride less often.
- Non-Riders will consider riding if they believe their expectations can be met; and they will support Metro if they feel the quality of service provided adds value to the community.



The majorities of Riders and Non-Riders have high expectations for the quality of service Metro provides and are generally positive to highly confident that Metro can meet these expectations.

There have been no changes in this key measure over the past several years.

Figure 108: Extent to Which Metro Meets Riders' and Non-Riders' Expectations for Service

Regular Riders are significantly more confident in Metro's ability to meet their expectations for quality service than are Infrequent and Non-Riders.

In addition, Non-Riders are more likely than both Regular and Infrequent Riders to say they have mixed or low expectations for quality and that they are not fully confident Metro can deliver quality service.

Table 21: Differences in Extent to Which Metro Meets Riders and Non-Riders' Expectations by Rider Status (2015)

	All Riders	Regular Riders	Infrequent Riders	Non-Riders
Expect High Quality / Confident Can Deliver	20%	24% ▲	12% ▼	16% ▼
Expect High Quality / Generally Positive	48%	45%	53%	41%
Mixed Expectations / Not Fully Confident	28%	26%	30%	26%
Low Expectations / Low Confidence	5%	5% ▼	5% ▼	16% ▲▲

Question: GW7 Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?

	All Riders and Non-Riders		*2015*			
	2013	*2015*	*All Riders*	*Regular Riders*	*Infrequent Riders*	*Non-Riders*
n	*2,414*	1,840	1,025	922	103	815
n_w	*2,414*	1,840	1,025	412	219	1,207

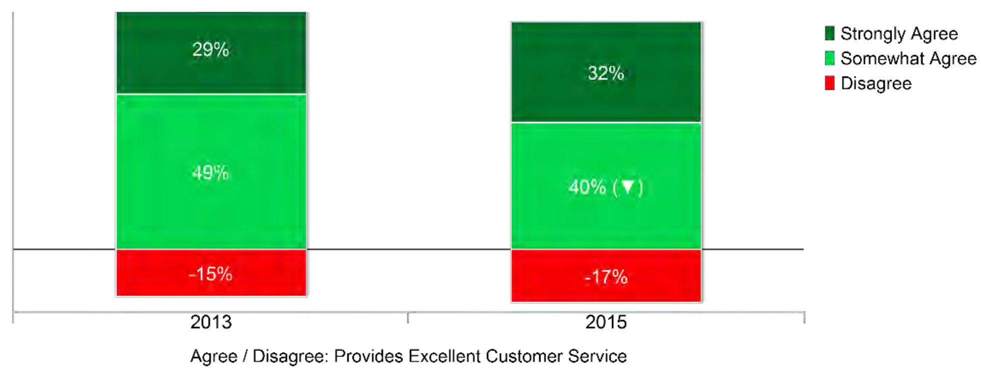
Brand Perception

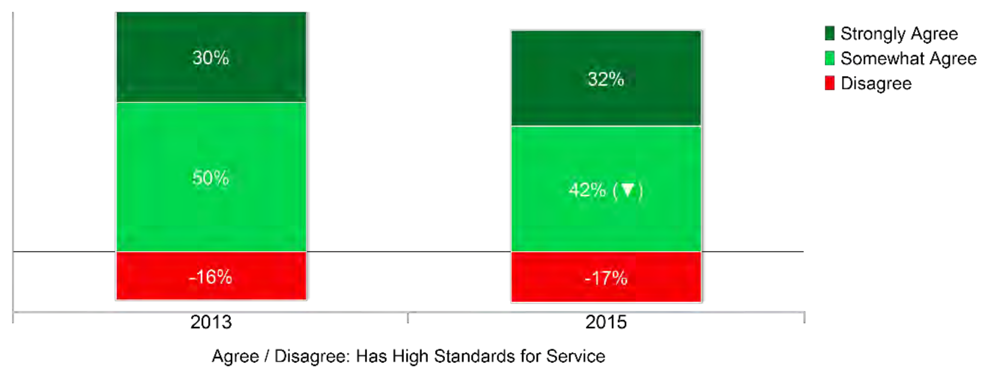
The majority of Riders and Non-Riders agree that Metro provides excellent customer service and has high standards for service.

However, the total percentage who agree decreased in 2015 due to a decrease in the percentage who somewhat agree. There was no change in the level of disagreement.

	% Agree	
	2013	2015
Provides Excellent Customer Service	78%	72% ▼
Has High Standards for Service	80%	74% ▼

Figure 109: Perceptions of Metro

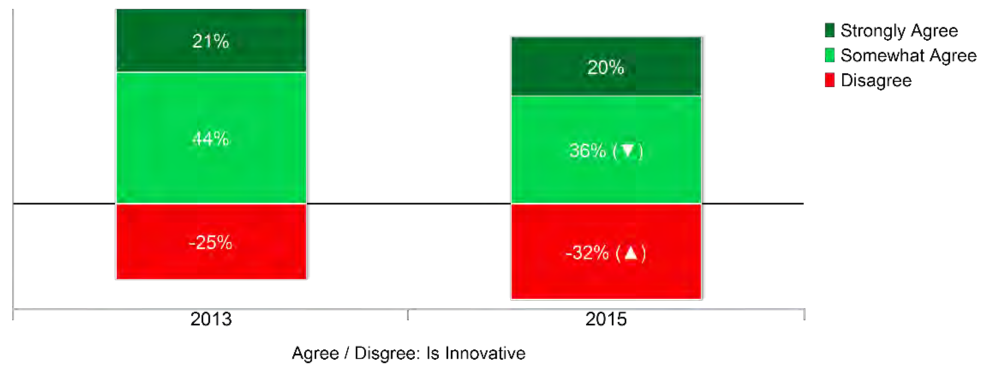




Riders and Non-Riders are less likely to agree that Metro is innovative.

Moreover, the percentage saying that Metro is NOT innovative increased significantly.

	% Agree	
	2013	2015
Is Innovative	65%	56% ▼



Overall, both Riders and Non-Riders feel that Metro has a commitment to providing quality service—both in terms of product and customer service. But, they are less likely to feel the agency is innovative.

- Riders are more likely than Non-Riders to have a strongly positive Brand Perception of Metro.
- In addition, Regular Riders are more likely than Infrequent Riders to have a strongly positive (as measured by the percentage who "strongly" agree) Brand Perception of Metro.
- A significant percentage of Non-Riders and, in some instances, Infrequent Riders say they neither agree nor disagree, suggesting they have no opinion or not enough information to respond.

	% Agree (Combined Strongly and Somewhat Agree)			
	All Riders	**Regular Riders**	**Infrequent Riders**	**Non-Riders**
Provides Excellent Customer Service	82%▲	83%▲	78%▲	66%▼▼
Has High Standards for Service	82%▲	83%▲	81%▲	70%▼▼
Is Innovative	65%	68%▲	59%▼▲	51%▼▼

Table 22: Provides Excellent Customer Service by Rider Status (2015)

Agree / Disagree: Provides Excellent Customer Service	All Riders	Regular Riders	Infrequent Riders	Non-Riders
Strongly Agree	37% ▼▲	41% ▲▲▲	28% ▼	29% ▼
Somewhat Agree	45% ▲	42% ▲	50% ▲	37% ▼▼▼
Neutral	5% ▲▼	3% ▼▼▼	8% ▲▼	16% ▲▲▲
Disagree	14% ▼	13% ▼	14%	18% ▲

Table 23: Has High Standards for Service by Rider Status (2015)

Agree / Disagree: Has High Standards for Service	All Riders	Regular Riders	Infrequent Riders	Non-Riders
Strongly Agree	34%	37% ▲	29%	31% ▼
Somewhat Agree	48% ▲	46% ▲	52% ▲	39% ▼▼▼
Neutral	4% ▲▼▼	1% ▼▼▼	10% ▲▲	10% ▲▲
Disagree	13% ▼	15% ▼	9% ▼	19% ▲

Table 24: Is Innovative by Rider Status (2015)

Agree / Disagree: Is Innovative	All Riders	Regular Riders	Infrequent Riders	Non-Riders
Strongly Agree	22%	25% ▲▲	15% ▼	19% ▼
Somewhat Agree	43% ▲	43% ▲	44% ▲	32% ▼▼▼
Neutral	8% ▲▼	5% ▼▼▼	13% ▲	14% ▲▲
Disagree	27% ▼	27% ▼	28%	34% ▲▲

Question: GW5 / GW6 Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements? (FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

	All Riders and Non-Riders		*2015*			
	2013	*2015*	*All Riders*	*Regular Riders*	*Infrequent Riders*	*Non-Riders*
n	2,414	1,840	1,025	922	103	815
n_w	2,414	1,840	1,025	412	219	1,207

External Influences and Brand Perception

The majority of Riders and Non-Riders hear positive things about Metro from their friends and colleagues and in the media, and continue to say they hear more positive things about Metro from their friends and colleagues than from the media.

- The extent to which Riders and Non-Riders strongly agree they hear positive things about Metro has increased significantly. In addition, the percentage who say they hear negative things has decreased significantly.

	% Agree	
	2013	2015
Hear Positive Things from Friends / Colleagues	61%	60%
Near Positive Things in the Media	56%	58%

Figure 110: Extent to Which Riders and Non-Riders Hear Positive Things about Metro from Friends / Colleagues

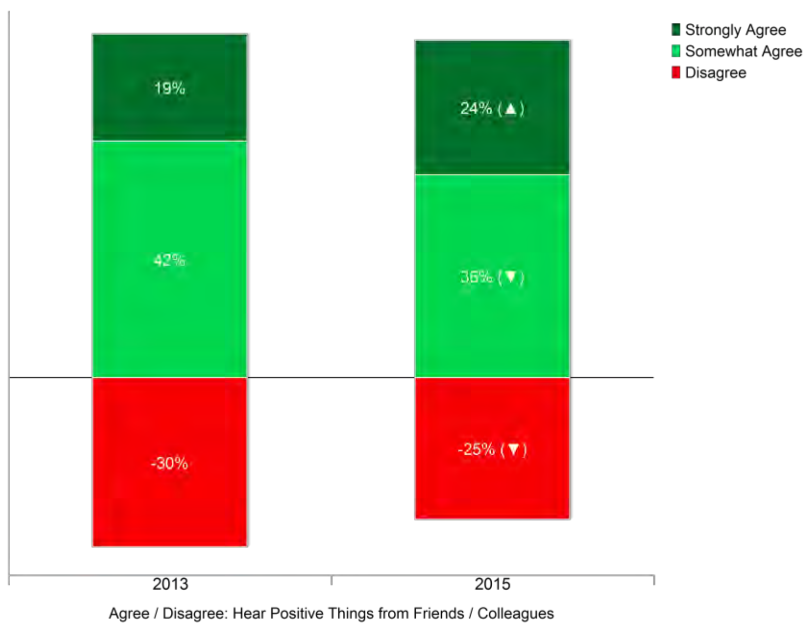
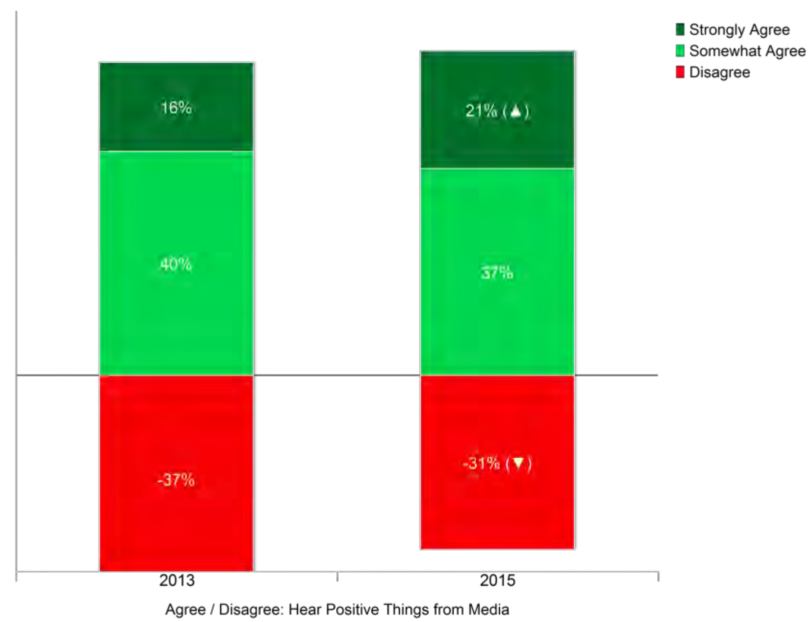


Figure 111: Extent to Which Riders and Non-Riders Hear Positive Things about Metro in Media



There are no significant differences in the extent to which Riders and Non-Riders agree that they hear positive things about Metro.

- While the majority of Riders agree that they hear positive things about Metro, they are more likely than Non-Riders to disagree. Notably, a significant percentage of Infrequent Riders disagree that they hear positive things about Metro in the media.

	% Agree (Combined Strongly and Somewhat Agree)			
	All Riders	Regular Riders	Infrequent Riders	Non-Riders
Hear Positive Things from Friends and Colleagues	62%	64%	59%	58%
Hear Positive Things in the Media	58%	64%	49%	59%

Table 25: Hear Positive Things from Friends and Colleagues by Rider Status (2015)

Agree / Disagree: Hear Positive Things from Friends and Colleagues				
	All Riders	Regular Riders	Infrequent Riders	Non-Riders
Strongly Agree	23%	26%	18%	24%
Somewhat Agree	39% ▲	38%	41%	34% ▼
Neutral	8% ▲▼	6% ▼▼▼	12% ▲	19% ▲▲
Disagree	30% ▲	31% ▲	28%	23% ▼

Table 26: Hear Positive Things in the Media by Rider Status (2015)

Agree / Disagree: Hear Positive things in the Media				
	All Riders	Regular Riders	Infrequent Riders	Non-Riders
Strongly Agree	20%	23%	15%	22%
Somewhat Agree	38%	41%	34%	37%
Neutral	7% ▼	5% ▼	10%	13% ▲▲
Disagree	35% ▲	31% ▼	42% ▲▲	28% ▼▼

Question: GW5 / GW6 Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements? (FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

	All Riders and Non-Riders		2015			
	2013	2015	All Riders	Regular Riders	Infrequent Riders	Non-Riders
n	2,414	1,840	1,025	922	103	815
n_w	2,414	1,840	1,025	412	219	1,207

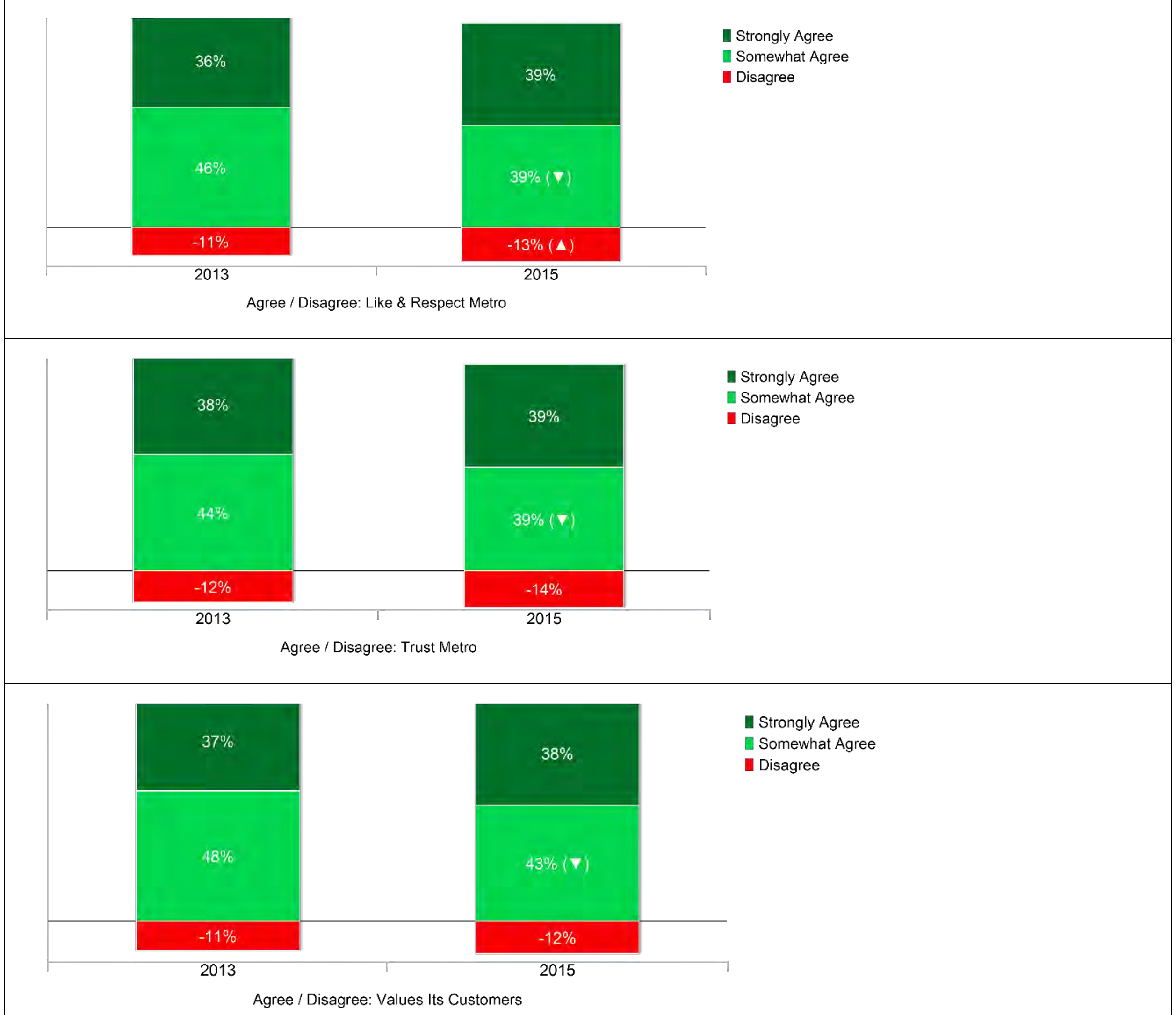
Brand Relationship

The majority of Riders and Non-Riders have a strong Brand Relationship with Metro.

However, the strength of those associations has weakened somewhat from 2013. Notably, while the percentage of those who strongly agree remained relatively stable, the percentage who somewhat agree decreased and a greater percentage have neutral opinions or disagree.

	% Agree	
	2013	2015
Like and Respect Metro	82%	78%
Agency I Trust	82%	78%
Values it Customers	85%	81%

Figure 112: Brand Relationship



Overall, the majority of Riders and Non-Riders agree with the three primary elements of Brand Relationship.

- Riders are more likely than Infrequent Riders and Non-Riders to have a stronger Brand Relationship with Metro due to a higher percentage of those who strongly agree with the three statements.
- Non-Riders are twice as likely as Riders to disagree that they like and respect Metro; they are also more likely to disagree that it is an agency they trust. A significant percentage of Non-Riders also have neutral opinions. There are no differences in the extent to which Riders and Non-Riders disagree that Metro values its customers

	% Agree (Combined Strongly and Somewhat Agree)			
	All Riders	Regular Riders	Infrequent Riders	Non-Riders
Like and Respect Metro	88%	90%	86%	73%
Agency I Trust	88%	89%	85%	74%
Values its Customers	87%	88%	85%	76%

Table 27: Agency I Like and Respect by Rider Status (2015)

	Agree / Disagree: Like and Respect Metro			
	All Riders	RR	INF	NON
Strongly Agree	45% ▲	48% ▲	40%	36% ▼▼
Somewhat Agree	43% ▲	42%	46%	37% ▼
Neutral	3% ▼	2% ▼	5%	11% ▲▲
Disagree	8% ▼	8% ▼	8% ▼	16% ▲▲▲

Table 28: Agency I Trust by Rider Status (2015)

	Agree / Disagree: Agency I Trust			
	All Riders	RR	INF	NON
Strongly Agree	45% ▲	48% ▲	38%	36% ▼▼
Somewhat Agree	43% ▲	41%	47%	38% ▼
Neutral	3% ▲▼▼	1% ▼▼▼	6% ▲▲	10% ▲▲
Disagree	10% ▼	10% ▼	9% ▼	17% ▲▲▲

Table 29: Extent to Which Metro Values its Customers by Rider Status (2015)

	Agree / Disagree: Values its Customers			
	All Riders	RR	INF	NON
Strongly Agree	40% ▼▲	45% ▲▲▲	30% ▼	36% ▼
Somewhat Agree	47% ▲	43% ▼	55% ▲▲	40% ▼▼
Neutral	3% ▼	2% ▼▼	6% ▲	11% ▲▲
Disagree	10%	10%	10%	13%

Question: GW5 / GW6 Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements? (FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

	All Riders and Non-Riders		*2015*			
	2013	*2015*	*All Riders*	*Regular Riders*	*Infrequent Riders*	*Non-Riders*
n	*2,414*	1,840	1,025	922	103	815
n_w	*2,414*	1,840	1,025	412	219	1,207

Brand Relationship and Riders

Riders like to be able to say they ride Metro.

Regular Riders are significantly more likely than Infrequent Riders to strongly agree with this statement.

- In addition, the strength of this relationship increased significantly among Regular Riders—percent "strongly" agree increased from 47% in 2013 to 55% in 2015.
- The percentage of Infrequent Riders who agree with this statement decreased—from 80% in 2013 to 74% in 2015—while the percentage who disagree increased—from 16% in 2013 to 20% in 2015.

Figure 113: Brand Relationship (I Like to Say I Ride Metro)

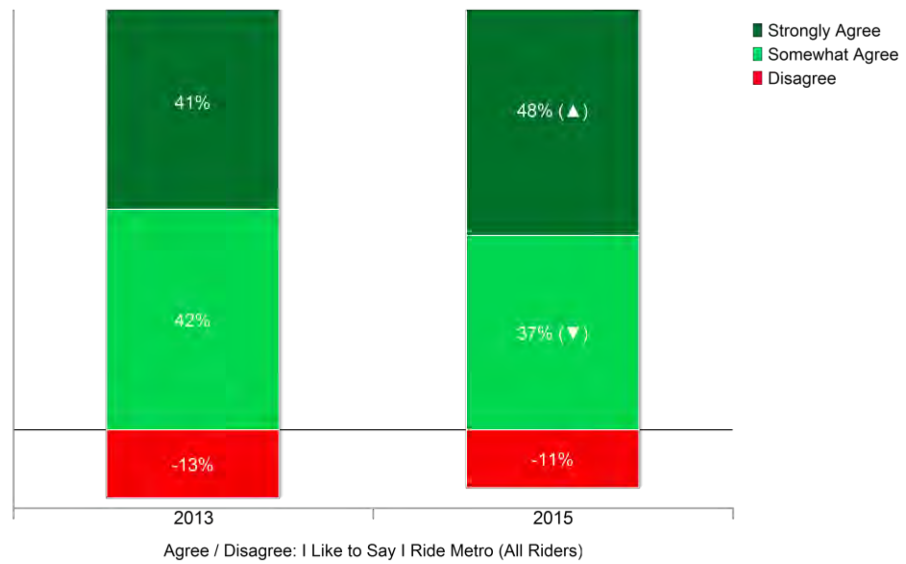


Table 30: Brand Relationship (I Like to Say I Ride Metro) by Rider Status (2015)

Agree / Disagree: I Like to Say I Ride Metro			
	All Riders	**Regular Riders**	**Infrequent Riders**
Strongly Agree	48% ▼▲	55% ▲▲	33% ▼▼
Somewhat Agree	37%	34%	41%
Neutral	5% ▼	4% ▼	6% ▼
Disagree	11% ▲▼	6% ▼▼	20% ▲▲

Question: GW5 Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements? (FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

	All Riders		*2015*	
	2013	*2015*	*Regular Riders*	*Infrequent Riders*
n	*1,395*	1,025	922	103
n_w	*1,395*	1,025	669	356

Perceived Value of Services Received

The majority of Riders and Non-Riders agree that Metro offers good value for level of service provided. However, there have been some changes in the strength of that agreement between 2013 and 2015.

Regular Riders are more likely than both Infrequent Riders and Non-Riders to strongly agree that provides a good value.

- The extent to which Regular Riders strongly agree with this statement increased significantly between 2013 and 2015—from 44% to 51%, respectively.

Infrequent Riders are more likely than Regular Riders to somewhat agree.

- The extent to which Infrequent Riders strongly agree with this statement decreased between 2013 and 2015—from 49% to 40%, respectively—while the percentage who somewhat agree increased—from 35% to 52%.

Non-Riders' views are coalescing.

- The percentage of Non-Riders who strongly agree that Metro provides good value increased from 36% in 2013 to 41% in 2015. At the same time the percentage disagreeing also increased—from 12% to 15%.

Figure 114: Value of Services Received from Metro

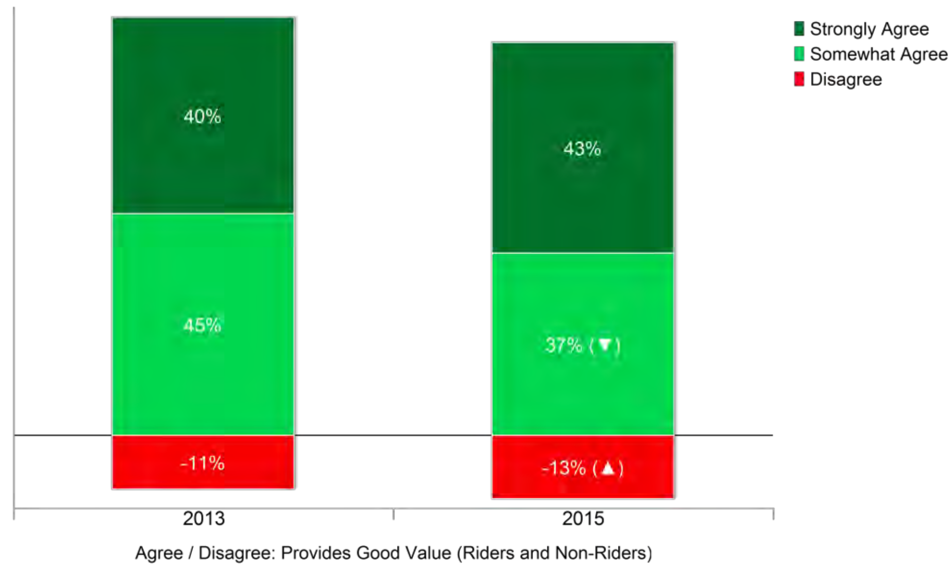


Table 31: Perceived Value of Services Received by Rider Status (2015)

Agree / Disagree: Provides Good Value for Level of Service Provided				
	All Riders	**Regular Riders**	**Infrequent Riders**	**Non-Riders**
Strongly Agree	48% ▲	51% ▲▲	40% ▼	41% ▼▼
Somewhat Agree	41% ▲▼▲	36% ▼▼	52% ▲▲▲	35% ▼▼
Neutral	1% ▼	1% ▼	2% ▼	9% ▲▲▲
Disagree	10% ▼	12% ▼	7% ▼	15% ▲▲▲

Question: GW5 Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements? (FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

	All Riders and Non-Riders		*2015*			
	2013	*2015*	*All Riders*	*Regular Riders*	*Infrequent Riders*	*Non-Riders*
n	2,414	1,840	1,025	922	103	815
	2,414	1,840	1,025	412	219	1,207

Goodwill Index

Calculations

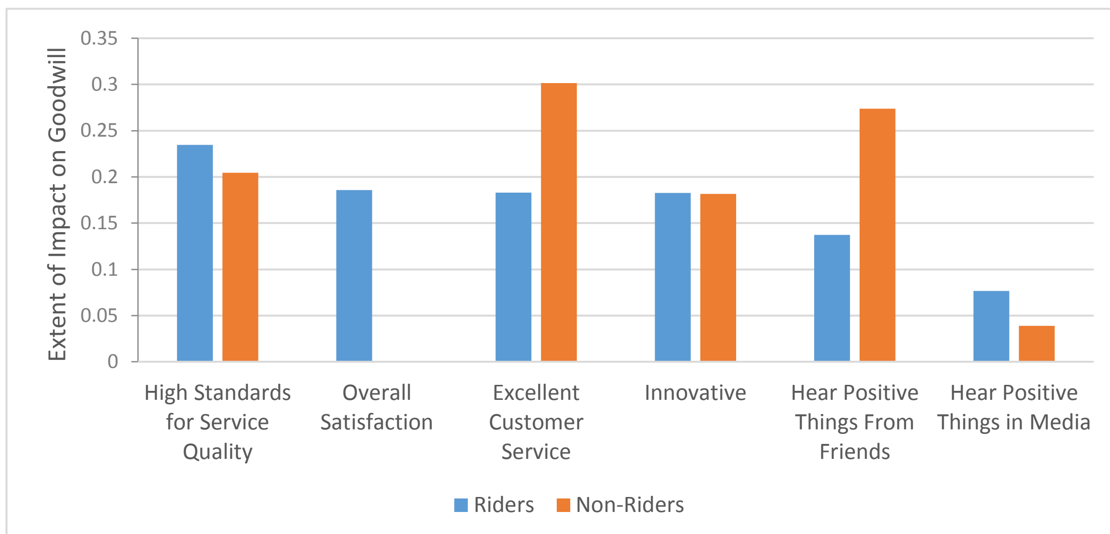
A Goodwill Index has been computed each year since 2013 based on some combination of these questions. In 2014, two indices were created based on which grouping of questions respondents were asked. In 2015, all respondents were asked all of the questions with the intent being to create a single index. Following is a description of the process followed to develop the 2015 Goodwill Index.

Step 1: The first step in developing the index was to determine (using regression analysis) the extent to which each of the individual elements within Brand Perception and Brand Relationship (the two components of goodwill that include multiple elements) contributed to Riders' and Non-Riders' expectations for Metro. This analysis is done separately for Riders and Non-Riders. The coefficients from this analysis were used to compute weighted indices reflecting overall Brand Perception and Brand Relationship.

Brand Perception is comprised of the six individual elements shown in Figure 115. Riders' Goodwill is most heavily influenced by their direct experiences with and perceptions of the service Metro provides, and less so by what they hear from other sources.

Among the five Brand Perception elements, Non-Riders' Goodwill is most strongly influenced by their perceptions of the customer service provided. It is also heavily influenced by what they hear from their friends and colleagues.

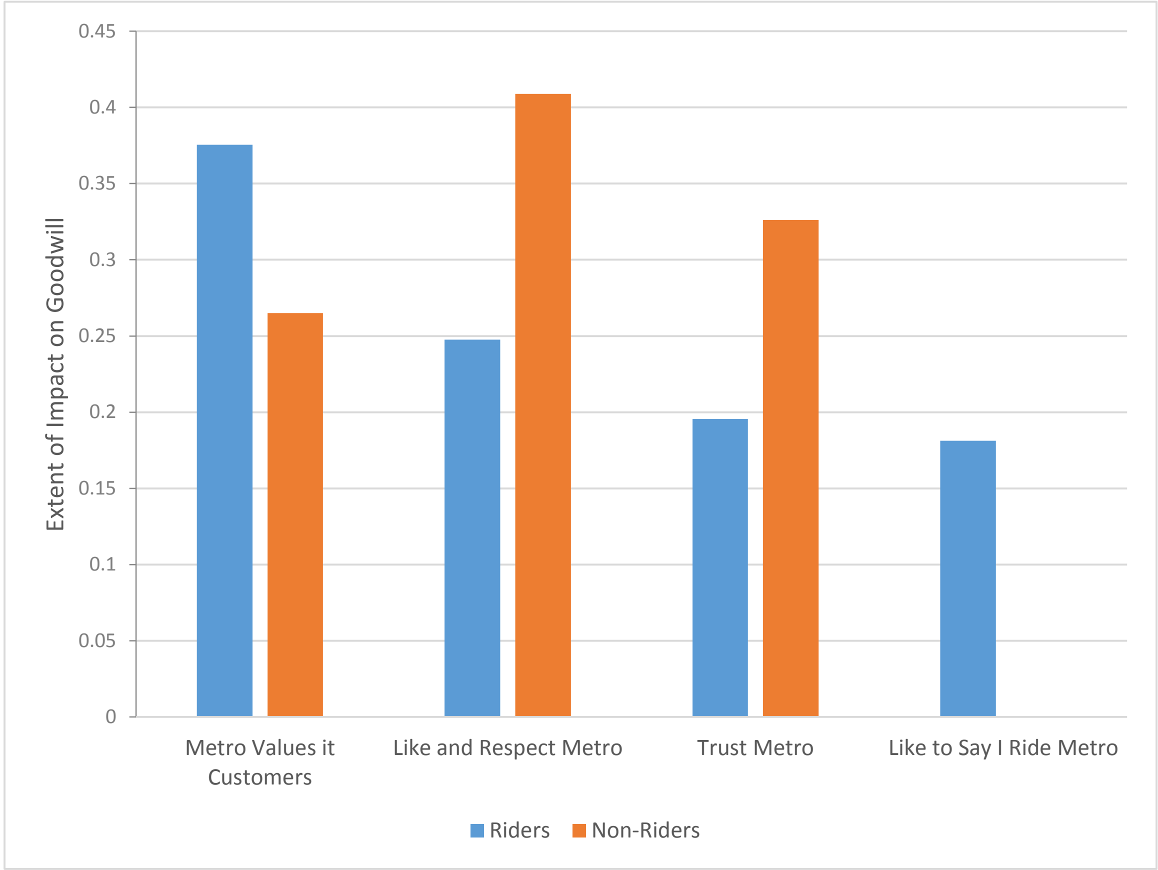
Figure 115: Impact of Individual Brand Perception Elements on Goodwill



Riders' Brand Relationship is measured by the four elements shown in Figure 116, and goodwill is most heavily influenced by the extent to which they feel Metro values its customers.

Of Non-Riders' three Brand Relationship elements, Goodwill is most strongly influenced by the extent to which they like and respect Metro and, to a lesser extent, the extent to which they trust the agency.

Figure 116: Impact of Individual Brand Relationship Elements on Goodwill

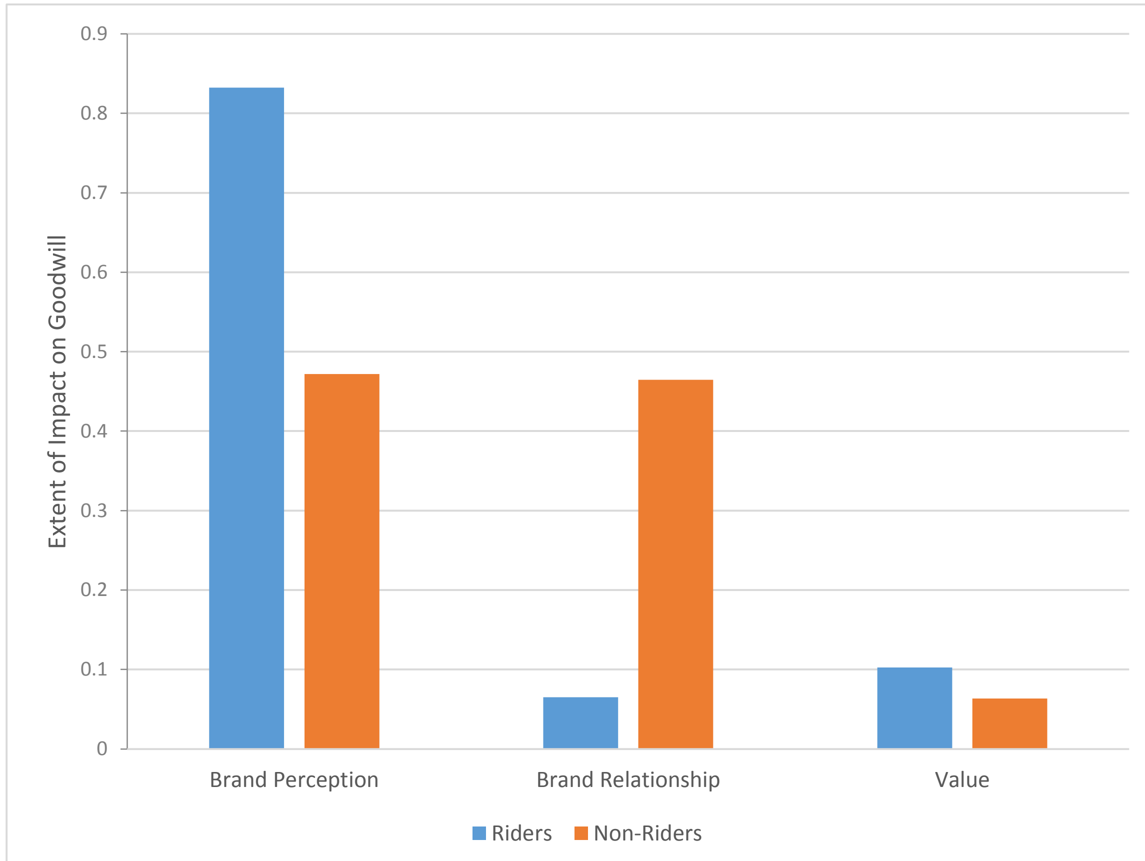


<u>Step 2</u>: We then used regression analysis to determine the extent to which the two overall indices reflecting overall Brand Perceptions and Brand Relationship and ratings for Perceived Value for the service received (the third component of Goodwill) collectively contributed to overall Goodwill.

Brand Perception is the single most important driver of Riders' Goodwill.

Brand Perception and Brand Relationship are nearly equally important components of Non-Riders' Goodwill.

Figure 117: Impact of Three Primary Components of Goodwill on Goodwill

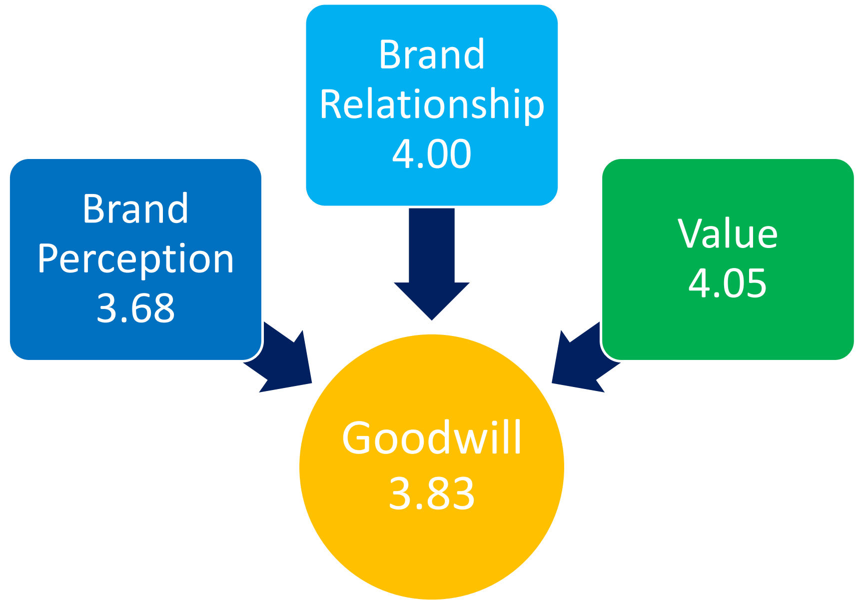


Step 3: Using the regression coefficients developed in Step 2, an overall Goodwill Index was computed.

Metro has a moderately high level of Goodwill (3.83).

Improving Brand Perception (i.e., what they hear about and feel about Metro) would have the greatest impact on overall Goodwill, notably for Riders.

Figure 118: Overall Brand Perception, Brand Relationships, Value, and Goodwill Indices

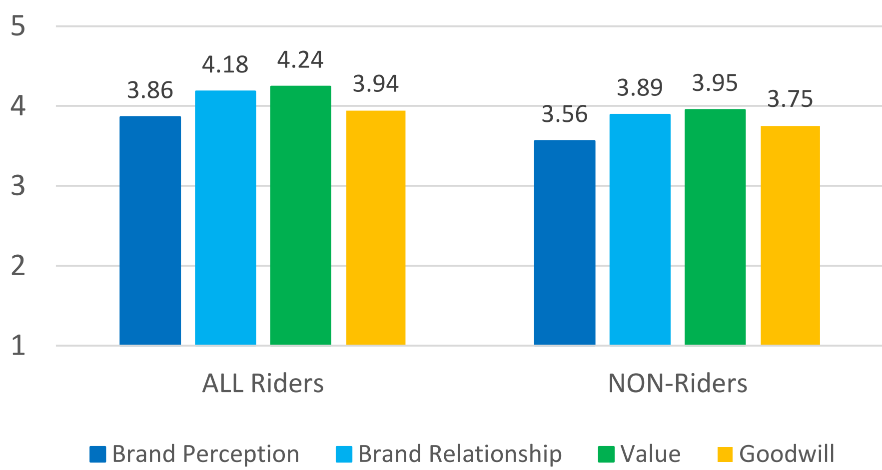


Computed indices are based on a 5-point scale where "5" means "very high" and "1" means "very low."

Differences by Rider Status

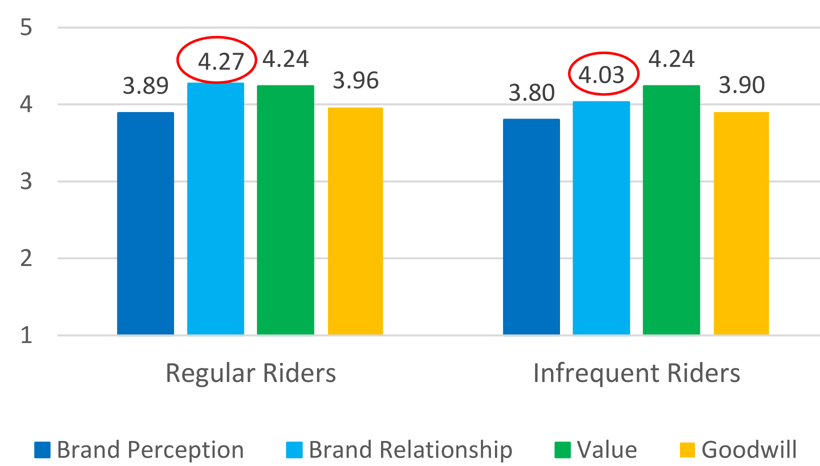
Riders have higher ratings for all components of the Goodwill Index than do Non-Riders.

Figure 119: Differences in Brand Perception, Brand Relationship, Value, and Goodwill Indices—Riders and Non-Riders



Infrequent Riders' overall Goodwill Index is somewhat lower than Regular Riders due to a weaker Brand Relationship Index.

Figure 120: Differences in Brand Perception, Brand Relationship, Value, and Goodwill Indices—Regular and Infrequent Riders

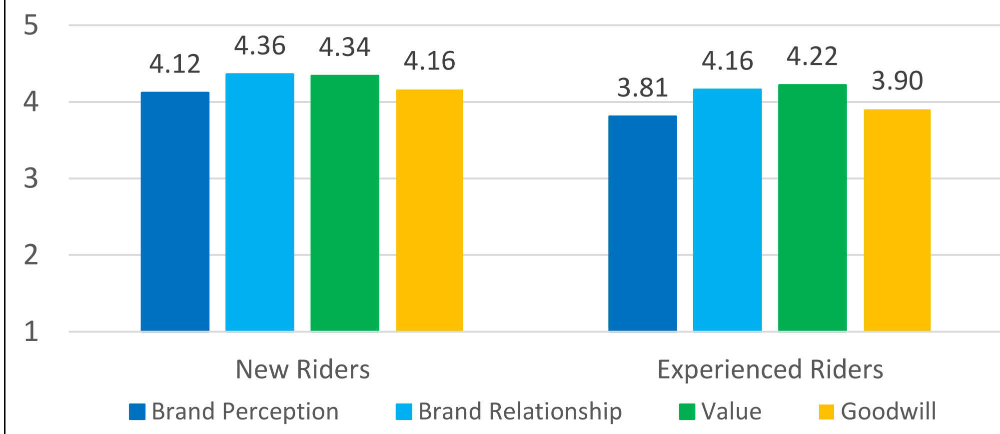


Computed indices are based on a 5-point scale where "5" means "very high" and "1" means "very low."

New Riders have a significantly higher Goodwill Index than do Experienced Riders due to a more positive Brand Perception and, to a lesser extent, Brand Relationship.

There were no other noteworthy differences in these indices between different Rider segments.

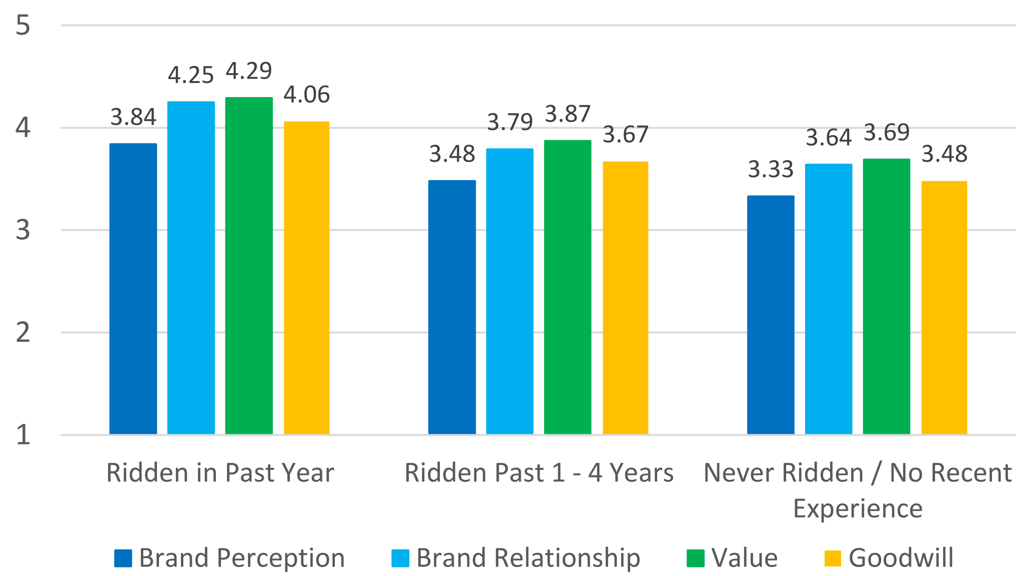
Figure 121: Differences in Brand Perception, Brand Relationship, Value, and Goodwill Indices New and Experienced Riders



Among Non-Riders, Goodwill decreases as the length of time since they last rode Metro increases.

Non-Riders with relatively recent experience with Metro (within the past year) have a Goodwill Index that is somewhat higher than among current Riders—4.06 compared to 3.94, respectively. These Non-Riders' index is between the index noted in Figure 121 for New versus Experienced Riders. The lower index for these recent Non-Riders compared to new Riders is due to a significantly lower Brand Perception Index.

Figure 122: Differences in Brand Perception, Brand Relationship, Value, and Goodwill Indices Non-Riders



FINDINGS: OTHER TOPICS

Two other topics were included in the survey: additional details regarding personal safety (Riders' concerns regarding safety and their perceptions of Metro's efforts to improve safety) and impact of the 2015 service changes.

Personal Safety

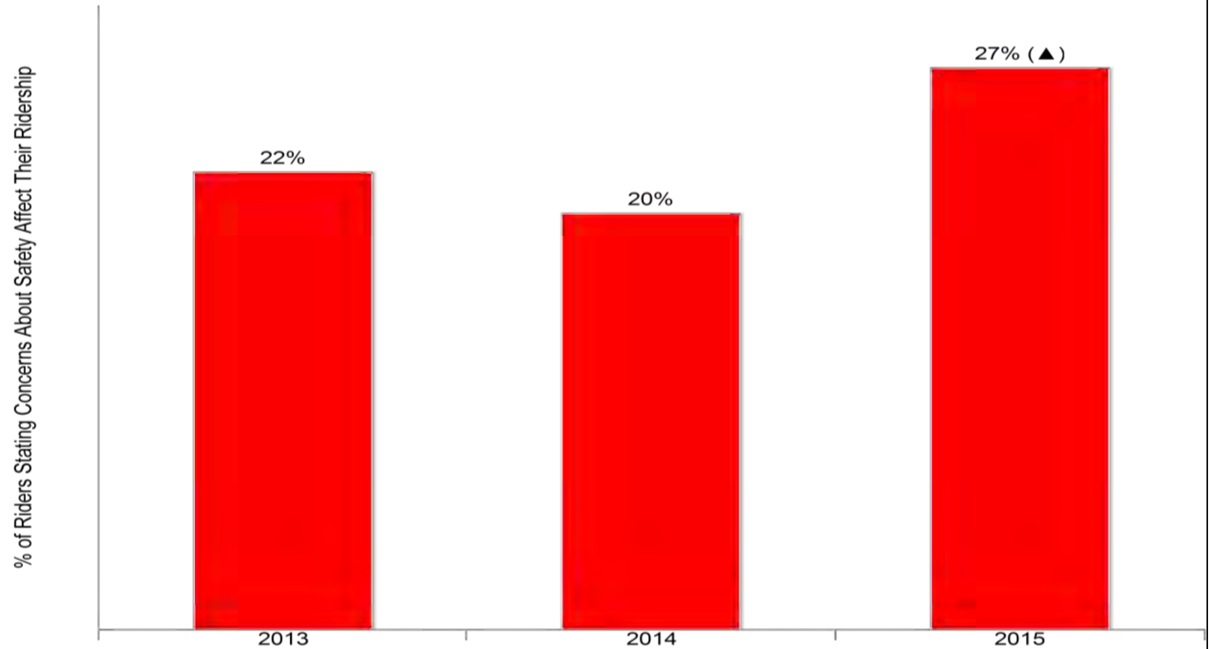
Summary

Topic	What We Found		What It Means
Concerns about Safety	While the majority of Riders do not avoid riding due to concerns about safety, the percentage who do increased in 2015.	**2013 2014 2015** **Avoid Riding Due to Concerns about Safety** 22% 20%▼ 27%▲ *Significant increase (▲) or (▼) from baseline (2012)*	Given the high importance of safety, it is important to focus on those areas of most concern to Riders who avoid riding. Particular focus should be safety onboard the vehicle due to the conduct of others after dark, as well as safety while waiting after dark.
Attitudes toward Metro's Efforts to Improve Safety	Consistent with the increase in concerns about safety noted above, the percentage of Riders who strongly agree that Metro provides a safe and secure transportation environment decreased. Total agreement with this statement has not changed. At the same time, one out of three respondents strongly agree that Metro is proactive in its efforts to improve safety, the same as in 2014. Moreover, the percentage who agree has increased significantly since 2013.	**% Strongly Agree** **2013 2014 2015** **Provides a Safe and Secure Environment** 35% 49%▲ 43%▼ **Is Proactive in Efforts to Improve Safety** 26% 33%▲ 34% **% Agree** **2013 2014 2015** **Provides a Safe and Secure Environment** 89% 90%▲ 90% **Is Proactive in Efforts to Improve Safety** 67% 70%▲ 76%▲	

Concerns about Safety

While the majority of Riders do not avoid riding due to concerns about safety, the percentage of Riders who do say they avoid riding due to concerns about safety increased significantly in 2015 and is at the highest ever.

Figure 123: Extent to Which Riders Avoid Riding Due to Concerns about Safety



Questions: PS3A Do you avoid riding the bus or streetcar due to concerns about your personal safety?

Base: Regular and Infrequent Riders

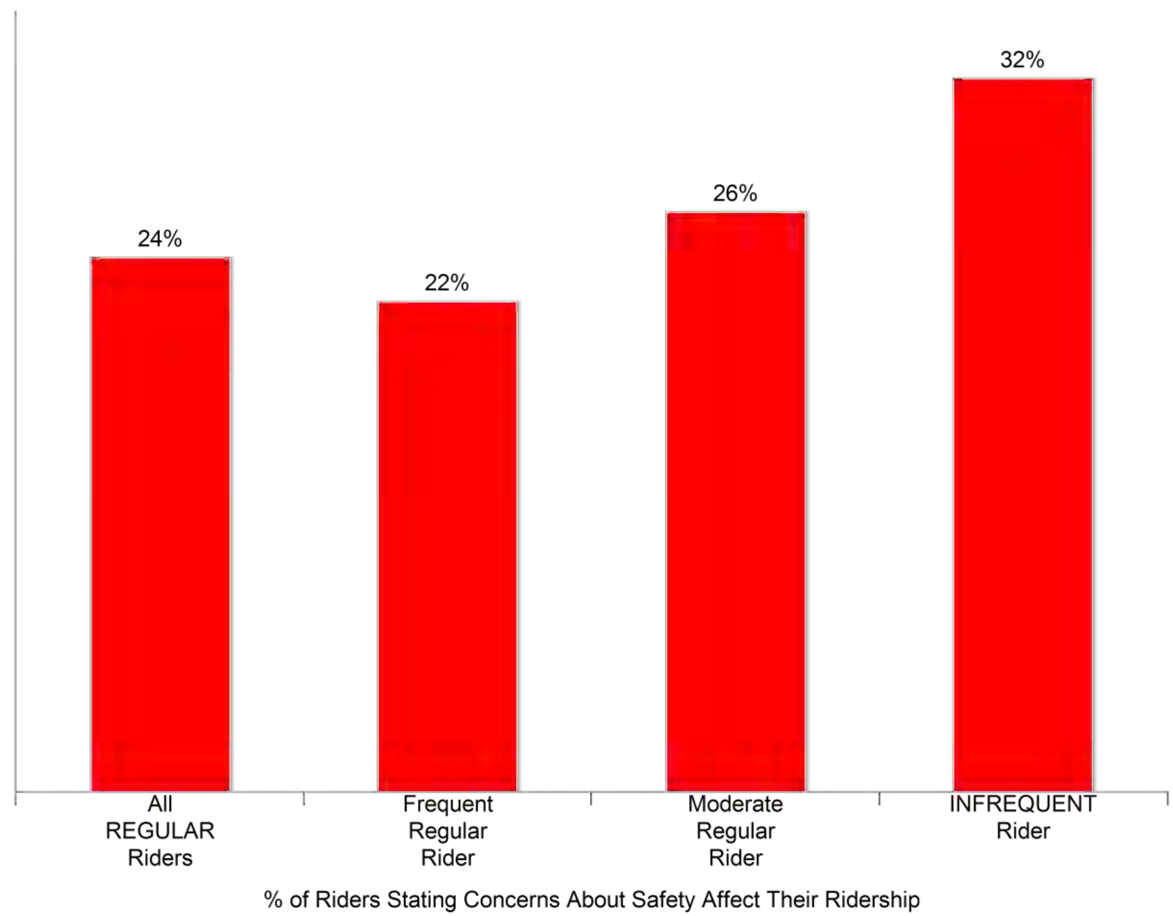
	2013	2014	2015
n	*1,395*	*1,102*	*1.025*
n_w	*1,395*	*1,161*	*1,025*

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

Infrequent Riders are more likely than Regular Riders to suggest that their concerns about safety cause them to avoid riding.

Moderate Regular Riders are somewhat more likely than Frequent Regular Riders to avoid riding due to safety concerns.

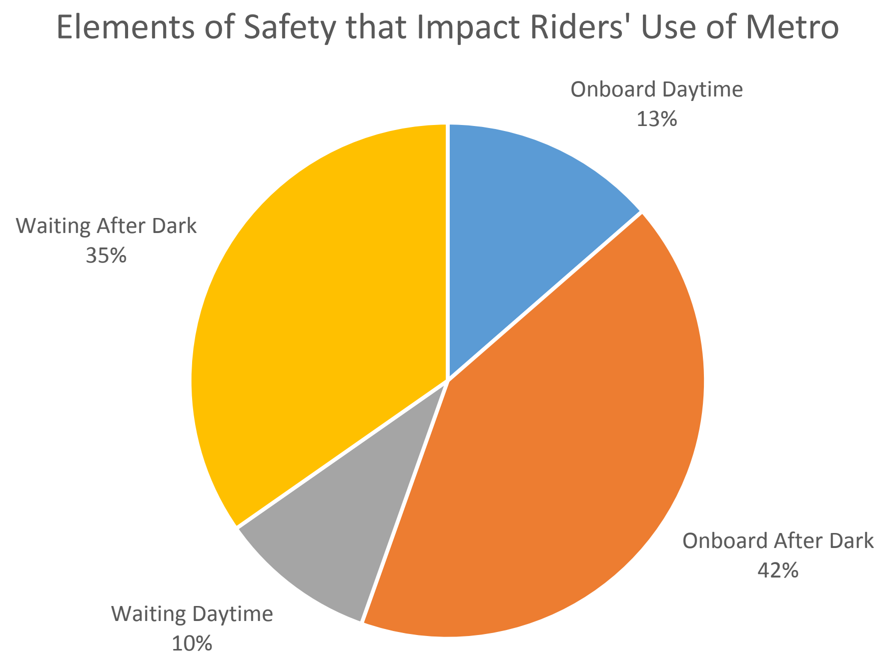
Figure 124: Extent to Which Riders Avoid Riding Due to Concerns about Safety by Rider Status



Regression analysis was used to determine which elements of personal safety had the greatest influence on Riders' who say they avoid riding Metro due to concerns about safety.

Satisfaction with safety after dark, notably onboard the vehicle as well as waiting, have the greatest influence on the extent to which Riders avoid riding Metro due to concerns about safety.

Figure 125: Factors Influencing the Extent to Which Riders Avoid Riding Metro Due to Concerns about Safety



Attitudes towards Metro's Efforts to Improve Safety

Riders generally agree that Metro provides a safe and secure transportation environment. However, the strength of that agreement decreased in 2015 after increasing in 2014. • Regular Riders are more likely than Infrequent Riders to strongly agree that Metro provides a safe and secure transportation environment—48% compared to 33%, respectively.	Riders are increasingly likely to agree that Metro has been proactive in improving safety and security—70% in 2014 increasing to 76% in 2015.

Figure 126: Agreement that Metro Provides a Safe and Secure Environment

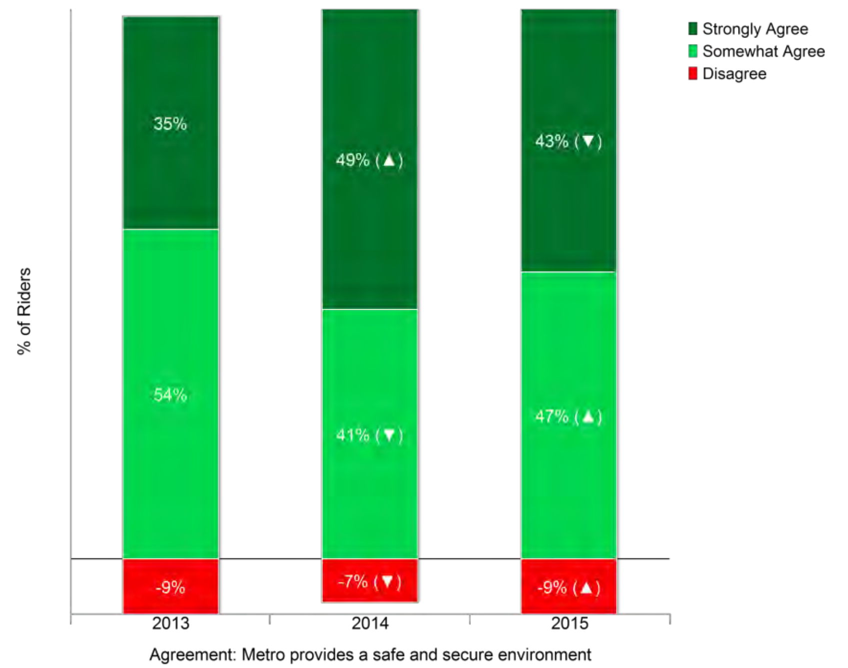
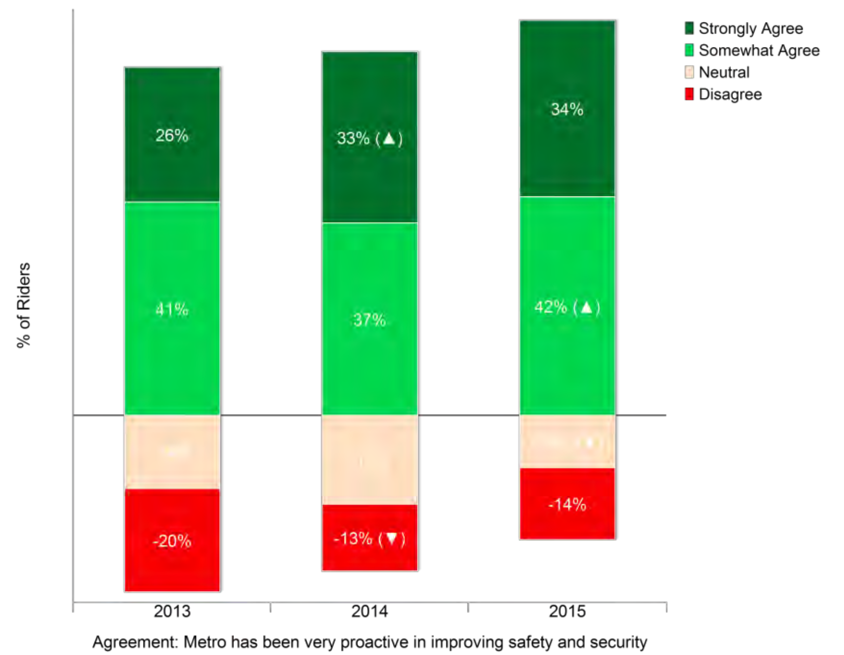


Figure 127: Agreement that Metro is Proactive about Safety Improvements



*Questions: PS5 As I read each of the following statements please tell me if you agree or disagree with. . . ? **(FOLLOW-UP)** Would that be strongly or somewhat (agree/disagree)?*

Base: Regular and Infrequent Riders

	2013	2014	2015
n	*1,395*	*1,161*	*1,025*
n_w	*1,395*	*1,161*	*1,025*

Awareness and Impact of 2015 Service Changes

Topic	What We Found	What It Means
Awareness and Impact of Service Changes	Nearly two out of three Riders were aware of service changes made in 2015. Far fewer (21%) said they were impacted by these changes. More than twice as many Riders living in the City of Seattle said they were impacted compared with those living throughout the rest of the county—27% compared to 13%, respectively. (As the majority of service changes were made in Seattle, it is likely that many riders both in and outside of Seattle were thinking of the 2014 service reductions, not the changes in 2015.) Satisfaction with the service changes was decidedly mixed. Seattle Riders who were dissatisfied were most concerned about their new bus stop location (moved or removed), general inconvenience, and less frequent service. Frequency of service was the greatest concern for all other Riders who were dissatisfied.	The majority of Riders were aware of the service changes, either due to being directly impacted or through some type of communications. Keeping Riders informed about upcoming service changes is an important component of customer satisfaction and the high level of awareness indicates that Metro was effective in communicating these changes.

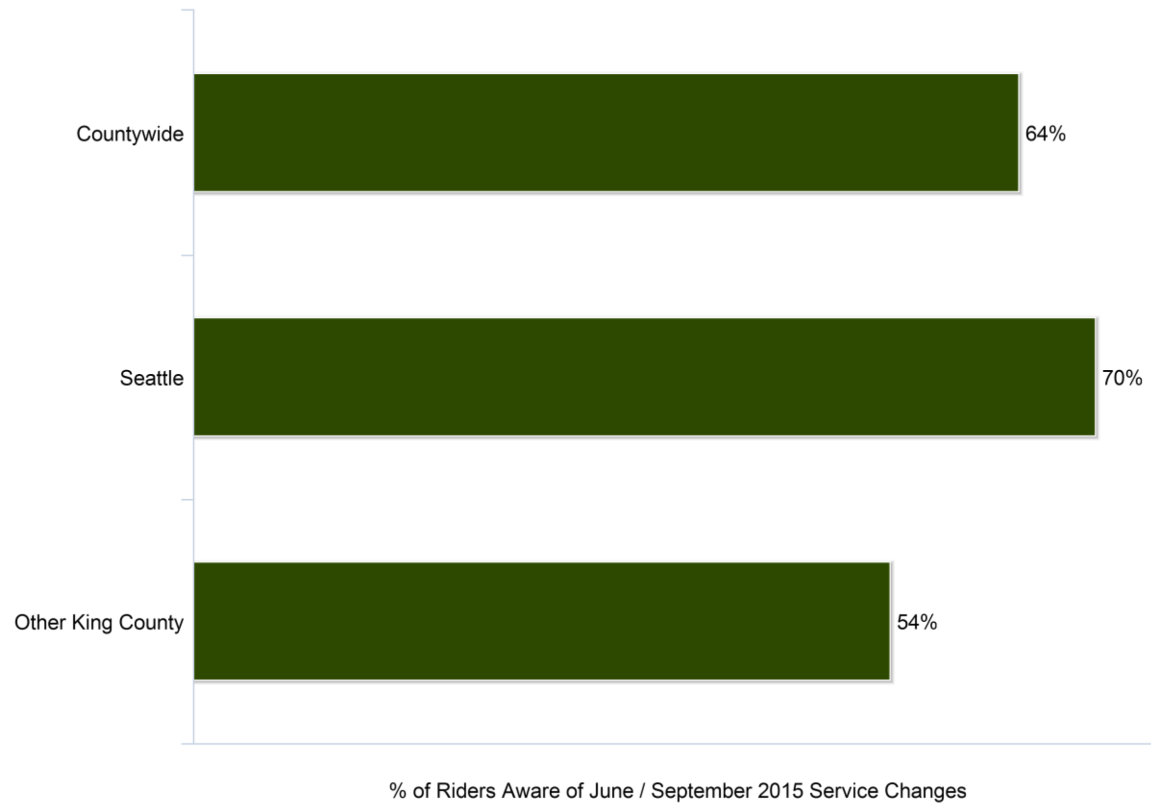
	% of Riders Countywide
Aware of Service Change(s)	64%
Impacted by Service Change(s)	21%
Satisfied with Service Change(s)	42%
Dissatisfied with Service Change(s)	48%
	% of Riders Seattle
Aware of Service Change(s)	70%
Impacted by Service Change(s)	27%
Satisfied with Service Change(s)	47%
Dissatisfied with Service Change(s)	44%

Awareness of June / September 2015 Service Changes

Nearly two out of three Riders were aware of recent services changes (made in June and September 2015).

- Residents of the City of Seattle, where the majority of service changes occurred, were much more likely than those in the balance of King County to be aware of these service changes.

Figure 128: Awareness of June / September 2015 Service Changes



Question: SC1 In June and September 2015, Metro added or changed service on approximately 50 routes. Are you aware of these changes? Don't know responses excluded from analysis / base.

	n	n_w
Base: All Regular and Infrequent Riders	*1,016*	*1,015*
Seattle	*458*	*625*
Other King County	*558*	*393*

Impact of Changes

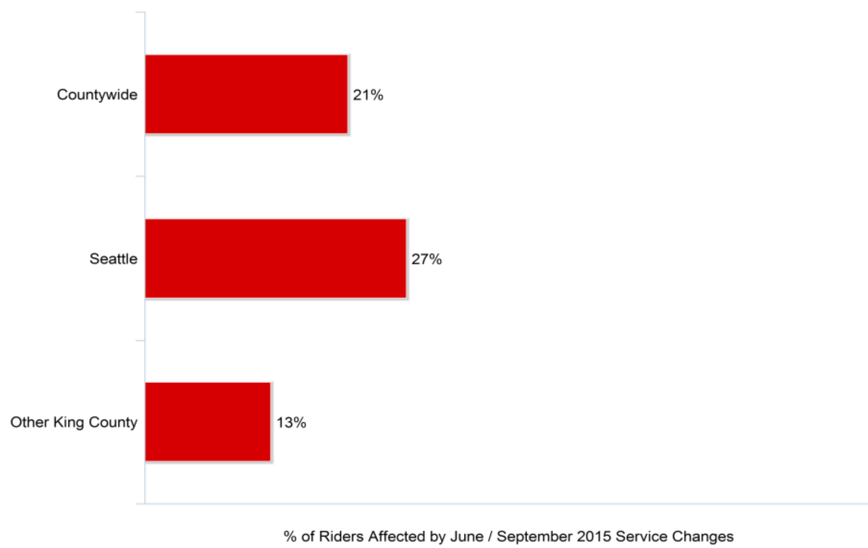
One out of five Riders said they were impacted by the most recent (June / September 2015) service changes.

- City of Seattle Riders were more than twice as likely to be affected. (As the majority of service changes were made in Seattle, it is likely that many riders both in and outside of Seattle were thinking of the 2014 service reductions, not the changes in 2015.)

Satisfaction with the service changes was mixed.

- Somewhat more Seattle Riders were satisfied with the service changes than dissatisfied.
- East King County Riders were the least satisfied (note the small sample sizes).

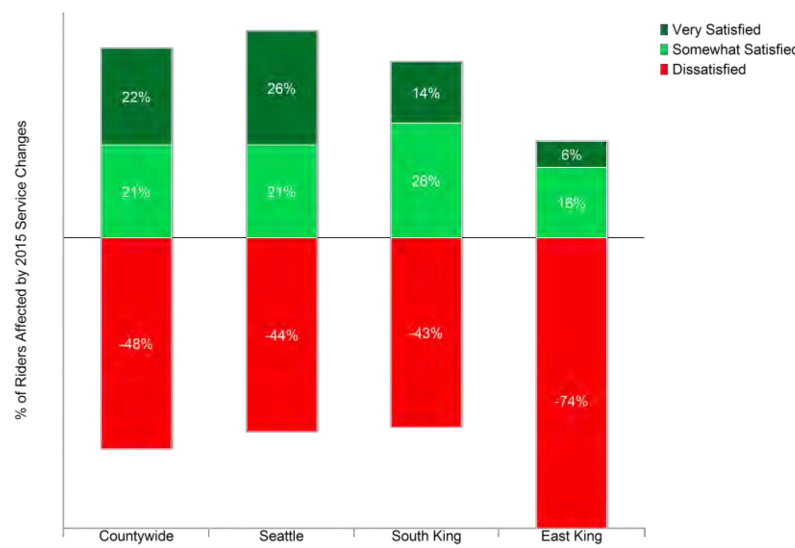
Figure 129: Percentage of Riders Impacted by Service Change(s)



Question: SC2 Did these changes affect the route or routes that you ride? (those not aware are included with % not impacted)

	n	*n_w*
Base: All Regular and Infrequent Riders	*1,016*	*1,015*
Seattle	*458*	*625*
Other King County	*558*	*393*

Figure 130: Satisfaction with Service Changes



Question: SC4 Are you satisfied or dissatisfied with the changes to these routes?

	Riders Impacted by Service Change(s)	
	n	*n_w*
Base: All Regular and Infrequent Riders	*221*	*206*
Seattle	*123*	*157*
South King	*41*	*20*
East King	*57*	*29*

Frequency of service was the greatest concern for Riders outside Seattle who were dissatisfied.

- Seattle Riders who were dissatisfied were most concerned about their new bus stop location (moved or removed), general inconvenience, and less frequent service.

Table 32: Reasons for Dissatisfaction with Service Changes

	Countywide	Seattle	Other King County
Base size	*97*	*42*	*55*
Less Frequent / Less Service	28%	20%	44%
Moved or Removed Bus Stops	21%	28%	9%
Inconvenience	17%	24%	4%
Discontinued Route	14%	8%	24%
Overcrowding	11%	13%	6%
Longer Trip Time	10%	7%	15%
Does Not Run as Early or Late	6%	6%	4%
Requires Transfer Now	4%	4%	5%
Have to Use Different (Less Desirable) Route	4%	4%	4%
Removed Bus From Tunnel	3%	3%	5%
Have to Use Park and Ride Now	2%	0%	7%

Question: SC4_NEW Why are you dissatisfied with the changes to these routes?

King County METRO We'll Get You There

2015 Rider / Non-Rider Survey

NWRG Project Number KCM_5602958_05_2015_Rider Non-Rider Survey

INSTRUMENT CONVENTIONS:

DENOTES PROGRAMMING INSTRUCTIONS

- Text in ALLCAPS is not read to respondents
- Red Text in [ALLCAPS SURROUNDED BY BRACKETS] are programming instructions, not read to respondents (note that you should not display red text within the web program)
    - ME = Mutually Exclusive
    - NE = Not Equal to
    - GE = Greater than or Equal to
    - LT = Less than
    - LE = Less than or Equal to
- Text in (ALLCAPS SURROUNDED BY PARENTHESES BOLD TYPE) are interviewer instructions, not read to respondents
- Question marks (?) and 'X' or 'x' indicate information needed or to be determined in conjunction with the client

INTRODUCTION

INT1 Hello, this is _________ from Bernett Research calling on behalf of King County Metro Transit. We are conducting a county-wide planning study for King County Metro. The study provides important information about Riders and Non-Riders and how they travel and helps Metro improve the region's transportation system.

This study is being conducted for research purposes only and everything you say will be kept strictly confidential. This call may be monitored or recorded for quality control purposes.

[**AS NEEDED**: This survey will last approximately 15 to 20 minutes.]

ASKIF CELL PHONE SAMPLE TYPE

INT2 Are you currently driving a car or doing any activity requiring your full attention?
IF NO: When is a more convenient time to call you back?

INT3 For this survey I would like to speak with a member of this household who is 16 years of age or older **and** has ridden a King County Metro bus, **5 or more times** in the last 30 days. Would that be you or someone else in your household? **[ASK TO SPEAK TO REGULAR RIDER]**

IF NO REGULAR RIDER, THEN SAY: Is there someone in your household that has ridden a King County Metro bus **at least once** in the last 30 days? **[ASK TO SPEAK TO INFREQUENT RIDER]**

IF NO REGULAR OR INFREQUENT RIDER, THEN SAY: CONTINUE TO SCREENER?

01 RIDER AVAILABLE/ SAFE TO TALK --CONTINUE
02 RIDER NOT AVAILABLE / NOT SAFE TO TALK -- **SCHEDULE CALL-BACK**
03 SPANISH SPEAKING HH
04 OTHER LANGUAGE SPEAKING HH **– THAND AND TERMINATE**
05 IMMEDIATE/SOFT REFUSAL **– SCHEDULE CALLBACK TO REFUSAL CONVERT OR OFFER ONLINE ALTERNATIVE**

SCREENING QUESTIONS
BASE: ALL RESPONDENTS

S1 To confirm, are you 16 years of age or older?

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

IF S1 = 01 SKIP TO S2A
IF S1 = 02, AND SAMPLETYPE=01, 02, 04, 05, 06, CONTINUE TO S1A. IF SAMPLETYPE=03, THANK AND CONCLUDE - S1: NQ-UNDER 16 (THANK3 TEXT)
IF S1 = 98, 99 THANK AND CONCLUDE [S1: SCREENER REFUSAL (THANK5 TEXT)]

DO NOT SHOW S1A IF SAMPLETYPE=03 (CELL PHONE)

S1A May I please speak with an individual in your household, 16 years of age or older?

01 NEW RESPONDENT AVAILABLE / WILLING TO PARTICIPATE **(REREAD INTRO FROM FLYSHEET)** **[GO BACK TO S1]**
02 NEW RESPONDENT NOT AVAILABLE **(FOLLOW-INSTRUCTIONS ON NEXT SCREEN)** **[GO TO "STOP SCREEN" (FROM BOTTOM OF QUESTIONNAIRE) AND COUNT AS A SCREENER INCOMPLETE] [SURVEY SHOULD RETURN TO S1]**
03 NEW RESPONDENT UNWILLING TO PARTICIPATE **[THANK AND CONCLUDE - S1: NQ-UNDER 16 (THANK3 TEXT)]**

S2A Are you a resident of King County?

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

IF S2A = 01, CONTINUE
IF S2A = 02, THANK AND CONCLUDE [S2A: NQ-NON-RESIDENT (THANK2 TEXT)]
IF S2A = 98, 99 THANK AND CONCLUDE [SCREENER REFUSAL: S2A (THANK5 TEXT)]

S2C What is your home zip code?

______ ENTER CORRECT ZIP CODE **[RANGE 98001 – 98354]**
99998 DON'T KNOW
99999 REFUSED

IF S2C EQ 99998 OR 99999, THANK AND CONCLUDE [S2C: SCREENER REFUSAL (THANK5 TEXT)]
IF ZIP CODE NOT IN SAMPLE LIST THANK AND CONCLUDE [OUT OF AREA (THANK2 TEXT)]

PROGRAMMER: CREATE VARIABLE = ZONE
USING ZIP CODE TABLE DOCUMENT

ASK S2D IF S2C = 98133, 98160, 98177, 98106, 98108, 98126, 98146, 98178

S2D Do you live within the Seattle City limits?

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

S3A Including yourself, how many people live in your household?

(ENTER RANGE BETWEEN 1 AND 8; IF MORE THAN 8 PEOPLE IN HOUSEHOLD ENTER 8)

_____ ENTER NUMBER OF PERSONS IN HOUSEHOLD **[RANGE 1 – 8]**
98 DON'T KNOW
99 REFUSED

IF S3A > 01 AND < 98 CONTINUE
IF S3A EQ 01 SKIP TO S5A
IF S3A = 98, 99 THANK AND CONCLUDE [S3: SCREENER REFUSAL (THANK5 TEXT)]

S3B Including yourself, how many people live in your household who are **16 years of age or older**?
(ENTER RANGE BETWEEN 1 AND 8; IF MORE THAN 8 PEOPLE IN HOUSEHOLD ENTER 8)

_____ ENTER NUMBER OF PERSONS 16+ IN HOUSEHOLD **[RANGE 1 – 8 / NUMBER SHOULD BE <= S3A]**
98 DON'T KNOW
99 REFUSED

IF S3B > 01 AND < 98 CONTINUE
IF S3B EQ 01 SKIP TO S5A

ASK S4B IF S3B > 1 AND < 98

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

_____ ENTER NUMBER OF **REGULAR** RIDERS IN HOUSEHOLD **[RANGE 0 TO RESPONSE S3]**
98 DON'T KNOW
99 REFUSED

ASK S4A IF S4B < S3B

S4A Including yourself, how many people in your household, 16 years of age or older, have taken **between one (1) and four (4)** one-way rides on a **Metro Bus** in the last 30 days?
[IF S4B GE 1 AND LT98 SHOW] In addition to the riders in your household who have taken 5 or more rides, Including yourself, how many people in your household, 16 years of age or older, have taken **between one (1) and four (4)** one-way rides on a **Metro Bus** in the last 30 days?

(**AS NEEDED:** A round trip counts as two rides. A trip where you had to transfer counts as one ride.)

___ ENTER NUMBER OF **INFREQUENT** RIDERS IN HOUSEHOLD **[RANGE 0 TO RESPONSE S3-S4B]**

98 DON'T KNOW
99 REFUSED

ASK S5A IF (S3A=1) OR (S3B = 1) OR (S4A > 0 AND S4A < 98) OR (S4B > 0 AND S4B < 98))

S5A Thinking about the last 30 days, how many **one-way rides** have **you** taken on a **Metro bus**?
(**AS NEEDED:** A round trip counts as two (2) one-way rides. A trip where you had to transfer counts as one ride.)
(IF MORE THAN 90, ENTER AS 90)
[IF RESPONDENT IS A RIDER BUT CONFUSED BY WHAT IS A ONE-WAY RIDE SELECT DON'T KNOW]

___ ENTER TOTAL NUMBER OF METRO BUS RIDES **[RANGE: 0-90]**
98 DON'T KNOW
99 REFUSED

ASK S5B IF S5A = 98, 99

S5B Would that be more than four (4) rides on a Metro bus?

01 YES, 5 OR MORE RIDES
02 NO, 1 TO 4 RIDES
03 NO, 0 RIDES / NEVER RIDE
98 DON'T KNOW
99 REFUSED

IF S5A AND S5B, EQ 98 OR 99, THANK AND CONCLUDE [RIDERMODE REFUSED (THANK5)]

TO DETERMINE INDIVIDUAL RIDER STATUS:

COMPUTE NUMRIDES = S5A

CREATE VARIABLE = RIDESTAT

01 REGULAR RIDER – (NUMRIDES>=5 OR (S5B=1)

02 INFREQUENT RIDER - (NUMRIDES=1 THRU 4) OR (S5B=2)

03 NON-RIDER – [(NUMRIDES=0) OR ((S4A=0) AND (S4B=0)) OR (S5B=3)]

PROGRAMMER: IF CANNOT DETERMINE INDIVIDUAL RIDER STATUS, THANK AND CONCLUDE [RIDESTAT UNDETERMINED (THANK99 TEXT)]

PROGRAMMER: CREATE VARIABLE = HHRIDESTAT

01 REGULAR RIDER HOUSEHOLD:

IF [(RIDESTAT=01) OR (S4B>=1)]

02 INFREQUENT RIDER HOUSEHOLD:

IF ((RIDESTAT=02) AND (S4B=0)) OR

[((RIDESTAT=03)) AND ((S4B=0) AND (S4A >=1)] OR

[(S3=1) AND (RIDESTAT=2)]

03 NONRIDER HOUSEHOLD:

((RIDESTAT=03)) AND ((S4B=0) AND (S4A=0))] OR

[S3A=1 AND (RIDESTAT=03))]

IF RIDESTAT = 01 CONTINUE WITH CURRENT RESPONDENT (SKIP TO S7)
IF HHRIDESTAT = 01 AND RIDESTAT NE 01 ASK SEL2

SEL2 To obtain a representative sample of all riders in the area, may I please speak with an individual in your household, 16 years of age or older, who has ridden a Metro bus 5 or more times in the past 30 days?

01 REGULAR RIDER AVAILABLE / WILLING TO PARTICIPATE **(REREAD INTRO FROM FLYSHEET)** **[THE CLIENT WANTS THE SURVEY TO REDIRECT TO S5A (SO THAT WE REASK S5A/S5B AND S6A/S6B TO RECLASSIFY RESPONDENTS AS NECESSARY) – IS IT POSSIBLE FOR YOU TO SKIP BACK TO S5A AND FORCE THE QUESTIONS TO BE ANSWERED AGAIN (ONLY) FOR THESE RESPONDENTS/THIS SCENARIO (SEL2 AND SEL3)?]**

02 REGULAR RIDER NOT AVAILABLE **(FOLLOW-INSTRUCTIONS ON NEXT SCREEN)** **[GO TO "STOP SCREEN" (FROM BOTTOM OF QUESTIONNAIRE) AND COUNT AS A SCREENER INCOMPLETE] [SURVEY SHOULD RETURN TO S5A - AS WITH SEL2=1, IS THERE ANYWAY TO MAKE THESE SPECIFIC RESPONDENTS START BACK UP AT (AN UNANSWERED/UNPOPULATED) S5A UPON REENTRY?)]**

03 REGULAR RIDER UNWILLING TO PARTICIPATE **(CONTINUE WITH RESPONDENT ON THE PHONE)** **[SKIP TO S7 LOGIC]**

IF HHRIDESTAT = 02 AND RIDESTAT = 02 CONTINUE WITH CURRENT RESPONDENT
IF HHRIDESTAT = 02 AND RIDESTAT NE 02 ASK SEL3

SEL3 To obtain a representative sample of all riders in the area, may I please speak with an individual in your household, 16 years of age or older, who has ridden a

Metro bus 1 to 4 times in the past 30 days?

01 INFREQUENT RIDER AVAILABLE / WILLING TO PARTICIPATE **(REREAD INTRO FROM FLYSHEET)** **[GO BACK TO S5A (LIKE SEL2=01)]**
02 INFREQUENT RIDER NOT AVAILABLE **(FOLLOW-INSTRUCTIONS ON NEXT SCREEN)** **[GO TO "STOP SCREEN" (FROM BOTTOM OF QUESTIONNAIRE) AND COUNT AS A SCREENER INCOMPLETE] [GO BACK TO S5A (LIKE SEL2=01)]**
03 INFREQUENT RIDER UNWILLING TO PARTICIPATE (CONTINUE WITH RESPONDENT ON THE PHONE) [CONTINUE TO S7]

ASK S7 IF RIDESTAT = 01 OR 02

S7 What **Metro bus** routes do you take?
(ENTER ALL THAT APPLY)

(IF GIVEN "NAME" OF ROUTE, ASK FOR THE ROUTE NUMBER. IF THEY DON'T KNOW THE ROUTE NUMBER, TYPE NAME INTO OTHER SPECIFY)

(IF SAY RAPID RIDE PROBE FOR LINE A, B, C, OR D)

(IF RESPONDENT GIVES A ROUTE NUMBER FOLLOWED BY "EXPRESS", JUST ENTER THE ROUTE NUMBER – DON'T WORRY ABOUT CAPTURING "EXPRESS")

____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**

(ROUTE HELP LIST)
1001 RAPID RIDE LINE A (FEDERAL WAY TO SEATAC ALONG PACIFIC AVENUE SOUTH AND INTERNATIONAL BLVD)
1002 RAPID RIDE LINE B (BELLEVUE TRANSIT CENTER AND DOWNTOWN REDMOND TRANSIT CENTER VIA CROSSROADS AND OVERLAKE)
1003 RAPID RIDE LINE C (DOWNTOWN SEATTLE AND WEST SEATTLE)
1004 RAPID RIDE LINE D (DOWNTOWN SEATTLE AND BALLARD / CROWN HILL)
1005 RAPID RIDE LINE E (DOWNTOWN SEATTLE AND AURORA VILLAGE TRANSIT CENTER / OPERATES ALONG AURORA AVENUE)
1006 RAPID RIDE LINE F (BURIEN TO RENTON)

1008 DART (600 TO 900 ROUTE NUMBERS)
2005 LINK LIGHT RAIL
2006 SOUNDER
2007 KING COUNTY WATER TAXI
2008 SEATTLE STREETCAR / SOUTH LAKE UNION STREETCAR / STREETCAR / ROUTE 98
9995 OTHER **(SPECIFY: ONLY ENTER UNLISTED NON-NUMERIC RESPONSE)**
9998 DON'T KNOW
9999 REFUSED

CONTNUE IF (S7 < 500) OR (S7 > 599) OR (S7 = 1001, 1002, 1003, 1004, 1005, 1006, 1007, 1008, 9995)

IF S7 ONLY EQUALS ROUTE NUMBER BEGINNING WITH 500 OR IF S7 ONLY EQUALS 2005, 2006, 2007, 2008 CHANGE RIDESTAT TO 03 (NON-RIDER)

ASK S7_1 IF MORE THAN ONE METRO ROUTE GIVEN IN S7 (METRO ROUTE INCLUDES ANY ROUTE NUMBER BELOW 500, ANY ROUTE NUMBER GREATER THAN 599, AND THE FOLLOWING LISTED ROUTES: 1001, 1002, 1003, 1004, 1005, 1006, 1007, 1008 / THIS WOULD NOT INCLUDE ANY ROUTE NUMBERS BETWEEN 500-599, AND THE FOLLOWING LISTED ROUTES: 2005, 2006, 2007, 2008)

S7_1 Which Metro bus route do you ride for the trip you take most often?
(**AS NEEDED:** The one you use most often.)

CAN WE MAKE THIS SO THAT ONLY ROUTES ENTERED/SELECTED IN S7 ARE SHOWN AS POSSIBLE RESPONSE OPTIONS?

____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**

(ROUTE HELP LIST)

1001 RAPID RIDE LINE A (FEDERAL WAY TO SEATAC ALONG PACIFIC AVENUE SOUTH AND INTERNATIONAL BLVD)
1002 RAPID RIDE LINE B (BELLEVUE TRANSIT CENTER AND DOWNTOWN REDMOND TRANSIT CENTER VIA CROSSROADS AND OVERLAKE)
1003 RAPID RIDE LINE C (DOWNTOWN SEATTLE AND WEST SEATTLE)
1004 RAPID RIDE LINE D (DOWNTOWN SEATTLE AND BALLARD / CROWN HILL)
1005 RAPID RIDE LINE E (DOWNTOWN SEATTLE AND AURORA VILLAGE TRANSIT CENTER / OPERATES ALONG AURORA AVENUE)
1006 RAPID RIDE LINE F (BURIEN TO RENTON)
1008 DART (600 TO 900 ROUTE NUMBERS)
9995 OTHER **(SPECIFY: ONLY ENTER UNLISTED NON-NUMERIC RESPONSE)**
9998 DON'T KNOW
9999 REFUSED

QUOTA EVALUATION 1

01 Overall Completes (SET TARGET TO 2400)

QUOTA EVALUATION 2

(CREATE VARIABLE = RIDEAREA_COMBO FOR QUOTA),

01 Seattle / North King County REGULAR RIDER [RIDESTAT=1 AND ZONE=1] (SET TARGET TO 600)

02 South King County REGULAR RIDER [RIDESTAT=1 AND ZONE=2] (SET TARGET TO 300)

03 East King County REGULAR RIDER [RIDESTAT=1 AND ZONE=3] (SET TARGET TO 300)

04 Seattle / North King County INFREQUENT RIDER OR NON-RIDER [RIDESTAT=2 OR 3 AND ZONE=1] (SET TARGET TO 200)

05 South King County INFREQUENT RIDER OR NON-RIDER [RIDESTAT=2 OR 3AND ZONE=2] (SET TARGET TO 500)

06 East King County INFREQUENT RIDER OR NON-RIDER [RIDESTAT=2 OR 3 AND ZONE=3] (SET TARGET TO 500)

GENERAL RIDERSHIP
BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

CREATE VARIABLE GROUP. RANDOMLY ASSIGN HALF OF THE PARTICIPANTS TO GROUP=1 AND HALF TO GROUP=2

M1 How long have you been riding **Metro**?

(READ LIST IF NECESSARY)

01 LESS THAN 3 MONTHS
02 3 TO 6 MONTHS
03 6 MONTHS TO 9 MONTHS
04 9 MONTHS TO 1 YEAR
05 1 TO 2 YEARS
06 3 TO 5 YEARS
07 5 YEARS OR MORE
98 **(NEVER READ)** DON'T KNOW
99 **(NEVER READ)** REFUSED

IF M1 LE 03 (6 TO 9 MONTHS) SKIP M1A AND AUTOCODE M1A = 01

IF M1=06 OR 07 SKIP M1A AND AUTOCODE M1A = 02

IF M1=04, 05, 98, OR 99 ASK M1A

M1A Did you start riding **Metro** after September of 2014?

- 01 YES
- 02 NO
- 98 DON'T KNOW
- 99 REFUSED

M5A When you ride a Metro **bus**, what is the **primary** purpose of the **trip or trips you take most often**?
[SELECT ALL THAT APPLY]
(READ IF RESPONDENT SAYS APPOINTMENTS: Would that be business appointments, medical appointments, or something else?)
(READ IF RESPONDENT SAYS TO GET/GO DOWNTOWN: What is the purpose of the trip you take to downtown? **OR** What do you do downtown?

[MULTIPLE SELECT]

- 01 TO/FROM WORK
- 02 TO/FROM SCHOOL
- 03 TO/FROM VOLUNTEERING
- 04 SHOPPING / ERRANDS
- 05 BUSINESS APPOINTMENTS
- 06 MEDICAL APPOINTMENTS
- 07 APPOINTMENTS OTHER **(SPECIFY)**
- 08 FUN / RECREATION / SOCIAL
- 09 SPECIAL EVENTS (SEAFAIR, BUMBERSHOOT SHUTTLES)
- 10 JURY DUTY
- 11 GO DOWNTOWN SEATTLE **(CLARIFY BEFORE USING THIS OPTION)**
- 12 GET TO AIRPORT
- 95 OTHER **(SPECIFY)**
- 96 USE FOR ALL TRIPS
- 97 NO SINGLE PRIMARY PURPOSE
- 98 DON'T KNOW
- 99 REFUSED
- 999 REFUSED

ASK M5C IF M5A HAS MULTIPLE RESPONSES

M5C ONLY SHOW RESPONSE OPTIONS SELECTED IN M5A

M5C You indicated that you use Metro to get to **[RESTORE RESPONSES TO M5A].** What is the trip you take most often?-

- 01 TO/FROM WORK
- 02 TO/FROM SCHOOL

03 TO/FROM VOLUNTEERING
04 SHOPPING / ERRANDS
05 BUSINESS APPOINTMENTS
06 MEDICAL APPOINTMENTS
07 APPOINTMENTS OTHER **(SPECIFY)**
08 FUN / RECREATION / SOCIAL
09 SPECIAL EVENTS (SEAFAIR, BUMBERSHOOT SHUTTLES)
10 JURY DUTY
11 GO DOWNTOWN **(CLARIFY BEFORE USING THIS OPTION)**
12 GET TO AIRPORT
95 OTHER **(SPECIFY)**
96 USE FOR ALL TRIPS/NO SINGLE PRIMARY PURPOSE **[MUTUALLY EXCLUSIVE]**
98 DON'T KNOW **[MUTUALLY EXCLUSIVE]**
99 REFUSED **[MUTUALLY EXCLUSIVE]**

ASK M5B IF (RIDESTAT = 01 OR 02) AND (M5C<=95)

M5B You indicated that you took
[RESTORE NUMRIDES. IF NUMRIDES=0 OR 98/99 THEN PULL IN RESPONSE TEXT AS FOLLOWS:
IF S5B=1 "5 OR MORE RIDES"
IF S5B=2 "BETWEEN 1 AND 4 RIDES"]
one-way trips on Metro in the past 30 days. What percentage of these trips were for **[RESTORE RESPONSE TO M5C** /IF **M5C=7/95, RESTORE OS RESPONSE]**?
____ RECORD PERCENTAGE **[RANGE 0 TO 100%]**
998 DON'T KNOW

DS1A How do you **usually** get from home to the bus stop you use most often?
01 DRIVE TO PARK-AND-RIDE / DRIVE AND PARK
02 RIDE WITH SOMEONE ELSE / CARPOOL
03 GET DROPPED OFF
04 WALK
05 BICYCLE
06 BUS
95 OTHER **(SPECIFY)**
98 DON'T KNOW
99 REFUSED

ASK DS1B IF DS1A = 04 OR 05

DS1B Approximately how far is it from your home to the Metro bus stop you use most often?
(ENTER NUMBER AND THEN SPECIFY WHETHER RESPONDENTS SAYS NUMBER OF BLOCKS OR NUMBER OF MILES, ALLOW DECIMAL RESPONSES)
___ ENTER NUMBER **[ALLOW DECIMALS] [RANGE: 1-90.99]**

03 BLOCKS
04 MILES
93 LESS THAN ONE BLOCK
94 LESS THAN ONE MILE
98 DON'T KNOW
99 REFUSED

M4 Now, thinking about all of your travel around King County, to what extent do you use a Metro **bus** to get around? Do you use a Metro **bus** for…

04 All of your transportation needs
03 Most of your transportation needs
02 Some of your transportation needs
01 Very little of your transportation needs
98 DON'T KNOW
99 REFUSED

PT1A What method of transportation do you usually use to get around for <u>most</u> of your personal travel?
(**AS NEEDED**: By "personal travel" we mean non-work travel.)
(**IF DRIVE, ASK:** Would that be alone, or with at least 2 people in the car **(CODE AS CARPOOL)**)
(**IF BUS, ASK:** Is that a Metro Bus, a Sound Transit Bus, or some other system?)
(**IF VARIES, ASK:** What do you usually do? **(OR)** What is your most common mode?)
(READ LIST ONLY IF NECESSARY)
[ENTER ALL THAT APPLY)

01 DRIVE ALONE
02 CARPOOL
03 VANPOOL
04 RIDE A METRO BUS
05 RIDE THE SOUTH LAKE UNION STREETCAR
06 RIDE THE SOUNDER TRAIN
07 RIDE LINK LIGHT RAIL
08 RIDE A SOUND TRANSIT BUS
09 SCHOOL BUS
10 RIDE ANOTHER SYSTEM'S BUS **(SPECIFY)**
11 MOTORCYCLE
12 BICYCLE
13 WALK
15 DRIVE TO PARK & RIDE LOT
16 KING COUNTY WATER TAXI
17 IT VARIES

18 TAXI / UBER / LYFT
19 SENIOR SERVICES / PARATRANSIT
95 OTHER **(SPECIFY)**
98 **(NEVER READ)** DON'T KNOW
99 **(NEVER READ)** REFUSED

M6 During which of the following time periods do you currently ride the **bus**? Do you ride …
(READ LIST AND GET A YES OR NO AFTER EACH)
(IF RESPONDENT SAYS "SOMETIMES" CODE AS YES/SOMETIMES)

M6#1 Weekdays before 6:00 a.m.
M6#2 Weekdays between 6:00 a.m. and 9:00 a.m.
M6#3 Weekdays between 9:00 a.m. and 3:00 p.m.?
M6#4 Weekdays between 3:00 p.m. and 6:00 p.m.
M6#5 Weekdays between 6:00 p.m. and 7:00 p.m.
M6#6 Evenings between 7:00 and 10:00 p.m.
M6#7 Evenings after 10:00p.m.
M6#8 Any time on Saturday?
M6#9 Any time on Sunday?

01 YES/SOMETIMES
00 NO
98 DON'T KNOW
99 REFUSED

SATINT Next, I am going to ask you about your satisfaction with different aspects of Metro service.

[DISPLAY FOR THE TOP OF EACH RATING SCREEN IN THIS SECTION (AFTER SATINT)]
Are you satisfied or dissatisfied with **(READ ATTRIBUTE)**?
(FOLLOW-UP) Would that be very or somewhat (SATISFIED/DISSATISFIED)?

05 VERY SATISFIED
04 SOMEWHAT SATISFIED
02 SOMEWHAT DISSATISFIED
01 VERY DISSATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

LEVEL OF SERVICE

RANDOMIZE M7A, M7C and M7E

M7B Frequency of service

ASK M7B_1 THROUGH M7B_4 IF M7B <= 04

M7B_1 Frequency of service during rush hours

M7B_2 Frequency of service during daytime, non-rush hours

M7B_3 Frequency of evening service between 7:00 and 10:00 pm

M7B_5 Frequency of nighttime service after 10:00 p.m.

M7B_4 Frequency of weekend service

M7A On-time performance

M7C Availability of service where you need to travel

M7E Amount of time it takes to travel

COMFORT / CLEANLINESS BUS INTERIOR

ASK M7G, M7H, M7I AND M7J IF GROUP=1

M7G Inside cleanliness of **buses**

M7H Availability of seating on the **bus**

M7I Overcrowding on the **bus**

M7J Ease of getting on and off due to crowding on the **bus**

COMFORT / CLEANLINESS BUS STOPS

ASK M7F, M7Q, M7R, M7T, MU AND M7W IF GROUP=1

M7F Cleanliness of shelters and stops

M7Q Availability of seating at shelters and stops

M7T Availability of shelters at **bus** stops

M7TT Protection from the weather when waiting

MU Distance from home to **bus** stop

M7W Ease of getting on and off the bus due to **crowding** at the **bus** stops

DRIVERS

ASK M7L, M7M AND M70 IF GROUP=2

M7L Driver helpfulness with route and stop information

M7M Drivers operate the **bus** in a safe and competent manner

M7O Drivers effectively handle problems on the **bus**

M7K Driver courtesy

M700 Drivers start and stop the **bus** smoothly

TRANSFERRING
BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

TRIP_5A How many transfers do you make on the trip you take most often?
(**AS NEEDED:** One-way trip only. Do not include transfers for round trips.)

(ENTER 4 IF 4 OR MORE. USE DECIMALS AS NEEDED FOR FRACTIONAL RESPONSES.)

___ ENTER NUMBER OF TRANSFERS **[RANGE 0.00 – 4.00]**
08 VARIES DEPENDING ON THE BUS
98 DON'T KNOW
99 REFUSED

SKIP TRIP_5B, M9, TRIP_5C, M11, AND M12 TRIP_5A=0, 98, 99 (CONTINUE IF TRIP_5A IS >0 BUT <98)]

TRIP_5B When you transfer are you transferring between a Metro bus and. . .
[READ LIST AND ENTER ALL THAT APPLY]

00 Another Metro bus
01 The Seattle Streetcar (AS NEEDED: South Lake Union Streetcar)
02 Link Light Rail
03 A Sound Transit bus
04 Sounder Train

05 A Pierce Transit Bus
06 Community Transit Bus
07 WATER TAXI / PASSENGER-ONLY FERRY
08 WASHINGTON STATE FERRIES
95 OTHER **(SPECIFY)**
98 DON'T KNOW
99 REFUSED

M9 Are you satisfied or dissatisfied with the number of transfers you have to take?
(FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

01 VERY DISSATISFIED
02 SOMEWHAT DISSATISFIED
04 SOMEWHAT SATISFIED
05 VERY SATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

TRIP_5C When you transfer, how long do you usually wait?
(**AS NEEDED:** How long do you usually wait, in minutes)

(ENTER MINUTES ONLY. ENTER 60 IF 60 OR MORE)
___ RECORD MINUTES **[RANGE 0 TO 60]**
97 VARIES
98 DON'T KNOW
99 REFUSED

M11 Are you satisfied or dissatisfied with the wait time when transferring?
(FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

01 VERY DISSATISFIED
02 SOMEWHAT DISSATISFIED
04 SOMEWHAT SATISFIED
05 VERY SATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

M12 Are you satisfied or dissatisfied with the way service connections are scheduled when making transfers?

(FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

01 VERY DISSATISFIED
02 SOMEWHAT DISSATISFIED
04 SOMEWHAT SATISFIED
05 VERY SATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

SERVICE CHANGE

BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

SC1 In June and September 2015, Metro added or changed service on approximately 50 routes. Are you aware of these changes?

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

ASK SC2 IF SC1 = 01

SC2 Did these changes affect the route or routes that you ride?

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

ASK SC3 AND SC4 IF SC2 = 01

SC3 Which routes were affected?

____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
____ ENTER ROUTE NUMBER **[ALLOW 1 TO 4 DIGITS]**
1001 RAPID RIDE LINE A (FEDERAL WAY TO SEATAC ALONG PACIFIC AVENUE SOUTH AND INTERNATIONAL BLVD)
1002 RAPID RIDE LINE B (BELLEVUE TRANSIT CENTER AND DOWNTOWN REDMOND TRANSIT CENTER VIA CROSSROADS AND OVERLAKE)
1003 RAPID RIDE LINE C (DOWNTOWN SEATTLE AND WEST SEATTLE)
1004 RAPID RIDE LINE D (DOWNTOWN SEATTLE AND BALLARD / CROWN HILL)
1005 RAPID RIDE LINE E (DOWNTOWN SEATTLE AND AURORA VILLAGE TRANSIT CENTER / OPERATES ALONG AURORA AVENUE)

1006 RAPID RIDE LINE F (BURIEN TO RENTON)
9995 OTHER **(SPECIFY: ONLY ENTER UNLISTED NON-NUMERIC RESPONSE)**
9998 DON'T KNOW
9999 REFUSED

SC4 Are you satisfied or dissatisfied with the changes to these routes?
(FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

01 VERY DISSATISFIED
02 SOMEWHAT DISSATISFIED
04 SOMEWHAT SATISFIED
05 VERY SATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

ASK SC4_NEW IF SC4 = 01 OR 02

SC4_NEW Why are you dissatisfied with the changes to these routes?

[OPEN END]

FARE PAYMENT
BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

F0. How do you usually pay your bus fare? Do you use...?
(READ THE FIRST FIVE RESPONSE CATEGORIES (IN PROPER CASE) ONLY)
(IF RESPONDENT SAYS ORCA CARD, STOP READING LIST, AND PROBE "ANYTHING ELSE")
(IF NO TO ALL, ASK: How do you pay your bus fare?**)**
(REREAD LIST BEFORE ACCEPTING/TYPING IN AN OTHER SPECIFY)

(SELECT ALL THAT APPLY)
00 AN ORCA LIFT CARD **[RESPONDENT MAY SAY BUT DO NOT READ: REDUCED FARE FOR INCOME-**
01 An ORCA Card
02 Cash
03 Tickets
04 A U-Pass (or Husky Card)

05 A Regional Reduced Fare Permit, including a Senior Pass and Disability Card/Pass **(RRFP)**
QUALIFIED / LOW-INCOME ADULT RIDERS]
06 ORCA CARD /PASS OR E-PURSE PROVIDED BY / PURCHASED FROM EMPLOYER
07 ACCESS PASS
08 SCHOOL DISTRICT CARD / PASS FROM SCHOOL **(PROBE WITH: Is this High School, a local college, or the University of Washington? IF UNIVERSITY OF WASHINGTON, CODE AS 04 – U-PASS/HUSKY CARD)**
94 KING COUNTY EMPLOYEE ID / BADGE
95 OTHER **(SPECIFY)** (PROBE: READ LIST AGAIN BEFORE ACCEPTING)
98 DON'T KNOW
99 REFUSED

F1 **[HIDDEN QUESTION: RECODE F0 RESPONSES BELOW]**

00 An ORCA Lift Card **[F0=00,]**
01 An ORCA Card **[F0=01, 07, 08]**
02 Cash **[F0=02]**
03 Tickets **[F0=03]**
04 A U-Pass (or Husky Card) **[F0=04]**
05 A Regional Reduced Fare Permit (Includes Senior Pass) **[F0=05]**
06 EMPLOYER PROVIDED ORCA CARD **[F0=06]**
94 KING COUNTY EMPLOYEE ID / BADGE **[F0=94]**
95 OTHER **(SPECIFY)** **[F0=95]**
98 DON'T KNOW **[F0=98]**
99 REFUSED **[F0=99]**

ASK F1A IF (F1 = 01)

IF (F1=04 OR F1=06 OR F1=94) AUTOCODE F1A AS 01 (ADULT CARD)

IF (F1=00) AUTOCODE F1A AS 00 (ORCA LIFT)

IF (F0=08), AUTO CODE F1A=02 (YOUTH CARD), REGARDLESS OF ANY OTHER RESPONSES AT F0

F1A Is your ORCA card a(n)…

(IF NO TO ALL ASK: Is it something else?**)**

(READ LIST; SELECT SINGLE RESPONSE)
00 An ORCA Lift card for income-qualified adults [RESPONDENTS MAY SAY LOW-INCOME BUT DO NOT READ]

01 Full-fare adult card (**AS NEEDED:** Includes passport, flexpass, or a pass provided by employer or college that is not the University of Washington (U-DUB))

02 Youth fare card (**AS NEEDED:** Includes school district card or pass and youth card)
03 Regional Reduced Fare Permit, including Senior and Disabled Fare Permit **(RRFP)**
04 U-Pass (or Husky Card)
95 SOMETHING ELSE **(SPECIFY)**
98 DON'T KNOW
99 REFUSED

ASK F1AA IF F1 = 02 OR 03

F1AA Do you have a Regional Reduced Fare Permit or RRFP?

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

IF FQ11 = 01 RECODE F1 TO 05 AND CONTINUE WITH F1B

ASK F1B IF F1 = 05 (RRFP) AND F1 NE 01 (ORCA)

F1B Is your Regional Reduced Fare Permit on an ORCA Card…
(**AS NEEDED:** which has a whale and the word "ORCA" on it)

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

ASK F1B_1 IF (F1A EQ 03) OR (F1 EQ 05) OR (F1AA=1)

F1B_1 Is your Regional Reduced Fare Permit a…

01 Senior Permit or
02 A Disabled Permit
98 DON'T KNOW
99 REFUSED

CREATE VARIABLE: FARE_PAYMENT AS SINGLE RESPONSE VARIABLE:

FARE_PAYMENT = 01 (CASH / TICKETS)
[IF F1 = 02 OR F1=03] AND (F1 NE 1) AND (F1AA NE 1)

FARE_PAYMENT = 03 (ADULT ORCA)
[IF (F1= 01) AND (F1A=01) AND (F1 NOT EQ 05)] OR [F1 = 06 OR F1 = 94]

FARE_PAYMENT =04 (YOUTH ORCA)
[IF F1 = 01 AND F1A EQ 02]

FARE_PAYMENT =05 (RRFP ORCA)
[(F1=01) AND (F1A=03)] OR [(F1=05) AND (F1B=01)] OR (F1 EQ 01 AND F1 EQ 05)

FARE_PAYMENT =06 (RRFP NOT ORCA)
(F1B EQ 02)

FARE_PAYMENT =07 (U-PASS)
[IF F1 = 04 OR F1A = 04]

FARE_PAYMENT =08 (ORCA LIFT)
[(IF F1 = 00) OR (F1A = 00)]

FARE_PAYMENT =95 (OTHER)
[IF F1 = 95 AND NO OTHER OPTION IS SELECTED] OR [EVERYTHING ELSE]

IF F1 IS MULTIPLE CHOICE AND ONE SELECTION IS 95 (OTHER), IGNORE THE 95 WHEN CREATING THE FARE_PAYMENT VARIABLE]

CREATE VARIABLE: ORCA

1 "ORCA CARD" IF FARE_PAYMENT=03 OR 04 OR 05 OR 08

2 "NOT ORCA CARD" IF FARE_PAYMENT=01 OR 06, OR 95

3 "U-PASS" IF FARE_PAYMENT=07

ASK F1D IF ORCA=01

F1D Which do you have on your ORCA card….

01 A monthly pass [AS NEEDED: that allows you to take as many rides as you want during the month,] or…
02 Money in an "electronic purse" or E-purse [AS NEEDED: that allows you to take rides until your purse is empty and you have to add more money]
03 BOTH
04 NO / NEITHER

05 EMPLOYER / SCHOOL PROVIDED SO I DO NOT KNOW
98 DON'T KNOW
99 REFUSED

ASK F2INT/F2A THROUGH F2B_1 IF (F1D=4 OR 98)

F2INT To help us figure out what is loaded on your card I would like to provide a brief definition of an E-Purse and a Pass. ORCA cards can have an electronic -Purse, called an E-purse, which is like having money stored on a card that can be used to pay your transit fare. The value stored on an E-Purse must be periodically re-loaded by you or your employer.

F2A Do you have an E-Purse on your ORCA card?
(**AS NEEDED:** Another way to think of the E-Purse is like a Starbucks card, where you or your employer has to periodically add value to the card in order to use it.)
(**AS NEEDED:** The E-Purse can be reloaded online, at ticket kiosks, Metro Customer Service Centers, or at certain retailers. Do you have an E-Purse on your ORCA card?)

01 YES
02 NO
98 DON'T KNOW
98 REFUSED

F2B_1 ORCA cards can also have a pass that allows you to ride as much as you want during the time the pass is valid. The pass may be called a Regional or Puget **(PRON: PEW-JET)** Pass, Passport or U-PASS that either you, your employer or school pays for. Do you have a pass on your ORCA card?

01 YES
02 NO
98 DON'T KNOW
98 REFUSED

F5INT Are you satisfied or dissatisfied with **(READ ATTRIBUTE)**? **(FOLLOW-UP)** Would that be very or somewhat (SATISFIED/DISSATISFIED)?

05 VERY SATISFIED
04 SOMEWHAT SATISFIED
02 SOMEWHAT DISSATISFIED
01 VERY DISSATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

ALL RIDERS (RIDESTAT = 01, 02]

F5A Ease of paying fares when boarding

ASK F5B IF ORCA=01 (ORCA CARD) OR FARE_PAYMENT = 07 (U-PASS)

F5B Overall satisfaction with your [RESTORE FARE_PAYMENT}

ASK F5C IF (F1D = 01 OR O3) OR (F2B_1=01)

F5C Ease of loading a pass on your ORCA card

ASK F5D IF (F1D=02 OR 03) OR (F2A=01)

F5D Ease adding value to your E-Purse

ALL RIDERS (RIDESTAT = 01, 02]

F5G Value of service for fare paid

ASK FR4A IF FARE_PAYMENT = 01

F4A You indicated that you use **[IF F1=02 INSERT "**cash**" / IF F1=03, INSERT "**tickets**"]** to pay your fare. Why do you prefer to use **[IF F1=02 INSERT "**cash**" / IF F1=03, INSERT "**tickets**"]** as opposed to an ORCA Card?

(ENTER ALL THAT APPLY)

01 DON'T RIDE OFTEN ENOUGH
02 EASIER TO PAY WITH CASH/TICKETS
03 DON'T HAVE A DEBIT OR CREDIT CARD TO PUT A PASS ON OR ADD VALUE TO AN ORCA CARD
04 NOT ENOUGH LOCATIONS AVAILABLE WHERE I CAN GO TO PUT A PASS ON OR ADD VALUE TO AN ORCA CARD
05 CONCERNS ABOUT LOSING ORCA CARD
06 CONCERNS ABOUT SECURITY / IDENTITY THEFT USING AN ORCA CARD
07 CAN'T AFFORD THE $5 FEE TO PURCHASE AN ORCA CARD
08 DON'T WANT TO / UNWILLING TO PAY THE $5 FEE TO PURCHASE AN ORCA CARD
09 RECEIVE TICKETS FROM SOCIAL SERVICE AGENCY / SCHOOL / WORK
10 HAVEN'T GOT AROUND TO IT / NO TIME / LOST CARD
11 DON'T KNOW ABOUT IT / HAVEN'T LOOKED INTO IT
95 OTHER **(SPECIFY)**
98 DON'T KNOW
99 REFUSED

RIDERS' PERSONAL SAFETY

BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

PS1 In the past year, how often have you done each of the following? Would you say frequently, sometimes, rarely, or never?

PS1A Ride the **bus** when it is dark

PS1C Get on or off a bus or Link Light Rail in the downtown transit tunnel

04 FREQUENTLY/ALWAYS
03 SOMETIMES
02 RARELY
01 NEVER/NO
98 DON'T KNOW
99 REFUSED

PS2INT Are you satisfied or dissatisfied with **(READ ATTRIBUTE)**?
(FOLLOW-UP) Would that be very or somewhat (SATISFIED/DISSATISFIED)?

05 VERY SATISFIED
04 SOMEWHAT SATISFIED
02 SOMEWHAT DISSATISFIED
01 VERY DISSATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

PS2A Personal safety on the **bus** related to the conduct of others during the daytime

PS2C Personal safety waiting for the **bus** in the daytime

ASK PS2B IF PS1A > 01 AND < 98

PS2B Personal safety on the **bus** related to the conduct of others after dark

ASK PS2D IF PS1A > 01 AND < 98

PS2D Personal safety waiting for the **bus** after dark

_ASK PS2E IF PS1B_1 > 01 AND < 98_

PS2E Personal safety in the downtown transit tunnel

PS3A Do you avoid riding the bus due to concerns about your personal safety?
(**IF YES, READ:** Would that be frequently, sometimes, or rarely?)

- 04 FREQUENTLY
- 03 SOMETIMES
- 02 RARELY
- 01 NEVER / NO, I DO NOT AVOID RIDING
- 98 DON'T KNOW
- 99 REFUSED

PS5 Please tell me if you agree or disagree with the following statements.
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

- 05 STRONGLY AGREE
- 04 SOMEWHAT AGREE
- 02 SOMEWHAT DISAGREE
- 01 STRONGLY DISAGREE
- 03 NEITHER AGREE NOR DISAGREE / NO OPINION
- 97 NOT APPLICABLE
- 98 DON'T KNOW
- 99 REFUSED

PS5B Metro has been very proactive in improving safety and security

PS5G Metro provides a safe and secure transportation environment

INFORMATION
BASE: CURRENT REGULAR AND INFREQUENT RIDERS (RIDESTAT = 01, 02)

IN4A Do you own a Smartphone?
IF YES: Is your Smartphone an I-Phone, an Android phone, or something else?

- 01 YES--IPHONE
- 02 YES—ANDROID
- 03 YES—SOMETHING ELSE
- 04 NO
- 98 DON'T KNOW

99 REFUSED

ASK IN1L IF IN4A = 01 OR 02 OR 03.

IN1L How often do you use a Smartphone to get information about Metro

04 Frequently
03 Sometimes
02 Rarely
01 Never
98 DON'T KNOW
99 REFUSED

ASK IN4B_2 IF IN1L > 01

IN4B_2 Which Smartphone apps or alerts do you use to get information about Metro?

(DO NOT READ LIST AND ENTER ALL THAT APPLY)
01 ONE BUS AWAY
02 TRANSIT APP *(SEATTLE TRANSIT)*
03 SEATTLEBUS
04 SEATTLE METRO
05 METRO'S TRIP PLANNER APP (m.tripplanner.kingcounty.metro)
06 GOOGLE/ GOOGLE MAPS / GOOGLE TRANSIT
09 METRO ALERTS EMAIL
10 METRO ALERTS TEXT
12 REAL TIME TRAVEL INFORMATION ON SMARTPHONE
13 SOCIAL MEDIA [FOLLOW-UP: Which sites do you use?]
14 METRO'S FACEBOOK PAGE
15 METRO TWEETS [@KCMETROBUS] / TWITTER
16 METRO MATTERS BLOG!
95 OTHER **(SPECIFY)**
97 NONE
98 DON'T KNOW
99 REFUSED

ASK IN4B_3 IF IN4B_2 NE 05 AND IN4A LE 03

IN4B_3 Have you heard of and/or used Metro's Trip Planner App? [AS NEEDED: (m.tripplanner.kingcounty.metro)]

01 YES: AWARE / NOT USED
02 YES: AWARE / USED
03 NO: NOT AWARE / HAVE NOT USED
98 DON'T KNOW
99 REFUSED

NEWIN1 **[SHOW IF (IN4A GE 04) OR (IN4B_2 GE 97)]** Which of the following do you use to get information about Metro?
[SHOW IF IN4B_2 LE 95] What else do you use to get information about Metro?

READ LIST OF ITEMS NOT IN CAPS AND ENTER ALL THAT APPLY. USE FOLLOW-UP PROBES]
[IF USE METRO ONLINE, FOLLOW-UP: Do you use the Online Regional Trip Planner when you go to Metro online / Metro's website??]
[IF USE INFORMATION AT STOPS, FOLLOW-UP: Would that be Posted / Printed or Real-Time Information sign?]
[IF USE ALERTS, FOLLOW-UP: Do you use Email and/or Text Alerts? ENTER APPROPRIATE RESPONSE]
[IF USE SOCIAL MEDIA, FOLLOW-UP: Which sites do you use?]
[IF USE SMARTPHONE, FOLLOW-UP: Do you use your Smartphone to get real-time travel information?]

01 Printed timetables
02 Metro Online [FOLLOW-UP: Do you use the Online Regional Trip Planner when you go to Metro online / Metro's website?]
03 Online Regional Trip Planner [**AS NEEDED:** the Trip Planner function on Metro Transit's website. You put in a start and end place and the trip planner tells you which routes to take]
04 Metro's Customer Service Call Center (**AS NEEDED:** 206-553-3000)
05 Information at Stops [FOLLOW-UP: Would that be Posted / Printed or Real-Time Information signs?]
06 POSTED / PRINTED INFORMATION AT STOPS
07 Real-time Information Signs
08 METRO ALERTS [FOLLOW-UP: Do you use Email and/or Text Alerts?]
09 METRO ALERTS EMAIL
10 METRO ALERTS TEXT
12 REAL TIME TRAVEL INFORMATION ON SMARTPHONE
13 SOCIAL MEDIA [FOLLOW-UP: Which sites do you use?]
14 METRO'S FACEBOOK PAGE
15 METRO TWEETS [@KCMETROBUS] / TWITTER
16 METRO MATTERS BLOG!
95 OTHER [SPECIFY]
97 NONE
98 DON'T KNOW
99 REFUSED

ASK IN3 IF GROUP=2. KEEP LOGIC FOR INDIVIDUAL QUESTION AS WELL.

IN3INT Are you satisfied or dissatisfied with **(READ ATTRIBUTE)**? **(FOLLOW-UP)** Would that be very or somewhat (SATISFIED/DISSATISFIED)?

05 VERY SATISFIED
04 SOMEWHAT SATISFIED
02 SOMEWHAT DISSATISFIED
01 VERY DISSATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

ASK IN3A ALL GROUP 2 RESPONDENTS

IN3A Overall ability to get information about Metro's routes and schedules

ASK IN3C IF NEWIN1=02

IN3C Availability of service information on Metro Online (**AS NEEDED:** Metro's website)

ASK IN3I IF NEWIN1=05

IN3I Availability of information at bus stops

ASK IN3I_1 IN3I <=4

IN3I_1 Availability of **printed** information at stop

ASK IN3I_2 IN3I <=4

IN3I_2 Availability of **real-time** information at stops

ASK IN3F IF NEWIN1=02

IN3F Website posting of service delays or other problems

ASK IN3G IF (NEWIN1=08 OR 09 OR 10) OR (IN4B_2=09 OR 10)

IN3G Alerts via e-mail or text messaging regarding service delays or other problems

ASK IN3G IF IN4B_2 LE 95

IN3J Availability of information via Smartphones

ASK IN3L ALL GROUP 2 RESPONDENTS

IN3L Ability to provide feedback such as registering a complaint or commendation

ASK IN3K ALL GROUP 2 RESPONDENTS
ALWAYS DISPLAY IN3K LAST

IN3K Notification of service changes

ASK IN3K _1 THROUGH IN3K _2 IF IN3K < 03

IN3K_1 Timeliness of notifications

IN3K_2 Adequacy of information provided

ASK IN5_1 IF IN4A LE 03 OR NEWIN1=07

IN5_1 **[SHOW IF IN4B_2 LE 95 OR NEWIN1=07]** You indicated that you currently use real-time travel info~~rmation your Smartphone.~~
[SHOW IF IN4B_2 GT 95] You indicated that you have a Smartphone.
Would you be interested in receiving real-time information that tells you about….
[READ LIST AND ENTER ALL THAT APPLY]

IN5A Arrival times

IN5C Seats are available on the bus

IN5B Space is available on the bus but may be standing room only

IN5D Comparative travel times between different routes, modes (bus versus rail), etc.

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

ASK IN5_2 IF IN4A LE 03 AND [ANY IN5A TO IN5D =01]

IN5_2 Would you prefer to get real-time information at stops, on your smartphone, or both?

03 AT STOPS

02 ON SMARTPHONE
01 BOTH
98 DON'T KNOW
99 REFUSED

NON-RIDER TRAVEL
BASE: NON-RIDERS (RIDESTAT = 03)

NON1A Do you use any of the other public transportation services in the area?

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

ASK NON1B IF NON1A EQ 01

NON1B Which do you use?
(IF RESPONDENT SAYS "SOUND TRANSIT" CLARIFY WITH: Would that be a Sound Transit Bus, Link Light Rail, or the Sounder Train? **)**

(READ LIST ONLY IF NEEDED; SELECT ALL THAT APPLY)

00 SEATTLE [SOUTH LAKE UNION] STREETCAR
01 SOUND TRANSIT BUS
02 LINK LIGHT RAIL
03 SOUNDER TRAIN
04 KING COUNTY WATER TAXI
05 MONORAIL
06 COMMUNITY TRANSIT
07 PIERCE TRANSIT
08 KITSAP TRANSIT
09 WASHINGTON STATE FERRIES
95 OTHER **(SPECIFY)**
98 **(NEVER READ)** DON'T KNOW
99 **(NEVER READ)** REFUSED

ASK NON1C IF NON1A EQ 01

NON1C How many one-way trips have you taken on [RESTORE RESPONSE TO NON1B] in the past 30 days?

___ ENTER TOTAL NUMBER OF RIDES **[RANGE: 0-90]**

98 DON'T KNOW
99 REFUSED

CREATE VARIABLE: OTHERTRANSITRIDER
01 RIDESTAT= 03
02 RIDESTAT = 03 AND (NON1A EQ 01 AND (NON1C > 04 AND NON1C < 98)

NON2 When was the last time you rode a **Metro bus**? Was it...

00 Within the last 1 to 3 months
01 Within the past 4 to 6 months
02 Six months to one year ago
03 Between 1 and 5 years ago, or
04 More than 5 years ago?
05 NEVER
98 DON'T KNOW
99 REFUSED

ASK NON2A IF NON2 EQ 00, 01, 02, 03
SKIP TO NON4B IF NON2 EQ 04, 05, 98, 99

NON2A When you rode **Metro**, what was the primary purpose of the trip you took most often?

(**READ IF RESPONDENT SAYS APPOINTMENTS:** Would that be business appointments, medical appointments, or something else?)
(**READ IF RESPONDENT SAYS TO GET/GO DOWNTOWN:** What is the purpose of the trip you take to downtown? **OR** What do you do downtown?)
(**READ IF RESPONDENT SAYS APPOINTMENTS:** Would that be business appointments, medical appointments, or something else?)
(**READ IF RESPONDENT SAYS TO GET/GO DOWNTOWN:** What is the purpose of the trip you take to downtown? **OR** What do you do downtown?)

01 TO/FROM WORK
02 TO/FROM SCHOOL
03 TO/FROM VOLUNTEERING
04 SHOPPING / ERRANDS
05 APPOINTMENTS
06 FUN / RECREATION / SOCIAL
07 SPECIAL EVENTS (SPORTS, SEAFAIR, BUMBERSHOOT SHUTTLES)
08 JURY DUTY
09 DOWNTOWN
10 AIRPORT
11 NO SINGLE PURPOSE
95 OTHER **(SPECIFY)**

98 DON'T KNOW
99 REFUSED

NON4B How far is it from your home to the nearest Metro bus stop?
(ENTER NUMBER AND THEN SPECIFY WHETHER RESPONDENTS SAYS NUMBER OF BLOCKS OR NUMBER OF MILES)

___ ENTER NUMBER **[ALLOW DECIMALS] [RANGE: 1-90.99]**
03 BLOCKS
04 MILES
93 LESS THAN ONE BLOCK
94 LESS THAN ONE MILE
98 DON'T KNOW
99 REFUSED

NON6A Overall, how appealing to you personally is the idea of **using** Metro? Would you say...

[SHOW SCALE IN THIS ORDER FROM LEFT TO RIGHT:

VERY APPEALING, SOMEWHAT APPEALING, NOT VERY APPEALING, NOT AT ALL APPEALING, NEITHER]

05 Very appealing
04 Somewhat appealing
02 Not very appealing
01 Not at all appealing
03 NEITHER APPEALING NOR UNAPPEALING
98 DON'T KNOW
99 REFUSED

ASK NON6B IF NON6A EQ 03, 04, 05

NON6B If **convenient transit service** was available to places you typically travel to, how likely would you be to **ride** Metro? Use an 11-point scale where "0" means "not at all likely" and "10" means "extremely likely."

00 Not At All Likely
01
02
03
04
05
06
07
08

09
10 Extremely Likely
98 DON'T KNOW
99 REFUSED

ASK NON6C IF NON6B >= 05 AND <98

NON6C What is the single most important thing that Metro could do to increase your likelihood of using the bus for at least some of your travel?

[OPEN-ENDED RESPONSE]

PARK-AND-RIDE LOTS
BASE: All Respondents

PR1 In the past year, ~~how often~~ have you used a Metro park-and-ride lot. ~~Would you say. . .~~

[IF YES ASK: Would that be frequently, sometimes, or rarely?]

04 YES - FREQUENTLY
03 YES - SOMETIMES
02 YES - RARELY
01 NO - NEVER
98 DON'T KNOW
99 REFUSED

ASK PR2D IF ~~PR2B~~ PR1 GT 1 AND LT 98

PR2D How do you **usually** get from home to the park-and-ride lot you use most often? **[SINGLE-RESPONSE]**

01 DRIVE YOURSELF
02 RIDE WITH SOMEONE ELSE / CARPOOL
03 GET DROPPED OFF
04 WALK
05 BICYCLE
06 BUS
95 OTHER **(SPECIFY)**
98 DON'T KNOW
99 REFUSED

[ASK PR3A, PR3B, PR3C, IF ((PR1>01) AND (PR1<98))

PR3INT Are you satisfied or dissatisfied with **(READ ATTRIBUTE)**?

(FOLLOW-UP) Would that be very or somewhat (SATISFIED/DISSATISFIED)?

05 VERY SATISFIED
04 SOMEWHAT SATISFIED
02 SOMEWHAT DISSATISFIED
01 VERY DISSATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

ASK PR3A IF PR2D = 01 OR 02

PR3A Availability of parking

PR3B Personal safety at the park-and-ride lot

ASK PR3C IF PR2D = 01 OR 02

PR3C Security of your automobile at the park-and-ride lot

COMMUTER STATUS
BASE: ALL RESPONDENTS

CS1 Are you currently…
(READ LIST UNTIL VALID RESPONSE GIVEN; SELECT ALL THAT APPLY)

01 Employed/SELF-EMPLOYED
02 A student
03 A homemaker
04 Retired
05 Currently not employed
94 DISABLED
95 OTHER **(SPECIFY)**
98 DON'T KNOW
99 REFUSED

ASK CS1A IF CS1 = 01

CS1A Are you employed…?

01 Full-time

02 Part-time
03 Self-employed
98 DON'T KNOW
99 REFUSED

ASK CS1B IF CS1 = 02

CS1B Are you a…?

01 Full-time student
22 Part-time student
98 DON'T KNOW
99 REFUSED

ASK CS1C IF CS1 = 01 AND 02

CS1C Which do you consider to be your primary activity?

01 Employed
02 A student
98 DON'T KNOW
99 REFUSED

ASK CS2B IF CS1 = 01

CS2B How many days a week do you travel to a fixed worksite?

_____ ENTER NUMBER OF DAYS **[RANGE: 0-7, 98, 99]**
98 DON'T KNOW
99 REFUSED

ASK CS2C IF CS2B > 0 AND [(RIDESTAT = 01) OR (RIDESTAT=02)]

CS2C Of the [RESTORE ANSWER TO CS2B] day(s) that you travel to work, how many days do you take a Metro bus as part of that commute?

_____ ENTER NUMBER OF DAYS **[RANGE: 0-RESPONSE TO CS2C, 98, 99]**
98 DON'T KNOW
99 REFUSED

ASK CS3B IF CS1 = 02

CS3B How many days a week do you travel to school, that is, **<u>you attend class outside your home?</u>**

_____ ENTER NUMBER OF DAYS **[RANGE: 0-7, 98, 99]**
98 DON'T KNOW
99 REFUSED

ASK CS3C IF CS3B > 0 AND [(RIDESTAT = 01) OR (RIDESTAT=02)]

CS3C Of the [RESTORE ANSWER TO CS3B] day(s) that you travel to school, how many days do you take a Metro bus as part of that commute?

_____ ENTER NUMBER OF DAYS **[RANGE: 0- RESPONSE TO CS3B, 98, 99]**
98 DON'T KNOW
99 REFUSED

CREATE VARIABLE = COMMUTER
01 WORK COMMUTER: CS2B >2 AND <98
02 SCHOOL COMMUTER: CS3B > 2 AND < 98
IF BOTH CS2B AND CS3B > 2 AND < 98
01 WORK COMMUTER IF CS1C = 01
02 SCHOOL COMMUTER IF CS1C = 02
03 NON-COMMUTER
ALL ELSE SO LONG AS RIDESTAT=01 OR 02

CREATE VARIABLE = WORK_COMMUTERS
1 "Non-commuters" (CS2B < 3) OR (CS1 NE 1)
2 "Commute, use Metro for all" (CS2B >=3) AND (CS2B=CS2C)
3 "Commute, use Metro for some" (CS2B >=3) AND (CS2B > CS2C) AND (CS2C >= 1)
4 "Commute, not use Metro" [(CS2B >=3) AND (CS2C <1)] OR [(CS2B >= 3) AND (RIDESTAT=3)]

CREATE VARIABLE = SCHOOL_COMMUTERS
1 "Non-commuters" (CS3B < 3) OR (CS1 NE 2)
2 "Commute, use Metro for all" (CS3B >=3) AND (CS3B=CS3C)
3 "Commute, use Metro for some" (CS3B >=3) AND (CS3B > CS3C) AND (CS3C >= 1)
4 "Commute, not use Metro" [(CS3B >=3) AND (CS3C <1)] OR [(CS3B >= 3) AND (RIDESTAT=3)]

CREATE VARIABLE WORK_SCHOOL_COMMUTE
1 "Non-Commuter" (WORK_COMMUTER=1) AND OR (SCHOOL_COMMUTER=1)
2 "Work non commuter—school all Metro" (WORK_COMMUTER=1) AND (SCHOOL_COMMUTER=2)

3 “Work non commuter—school some Metro (WORK_COMMUTER=1) AND (SCHOOL_COMMUTER=3)
4 “Work non commuter—school no Metro“ (WORK_COMMUTER=1) AND (SCHOOL_COMMUTER=4)
5 “Work all metro—school non-commuter“ (WORK_COMMUTER=2) AND (SCHOOL_COMMUTER=1)
6 “Work all metro—school all Metro“ (WORK_COMMUTER=2) AND (SCHOOL_COMMUTER=2)
7 “Work all metro—school some Metro“ (WORK_COMMUTER=2) AND (SCHOOL_COMMUTER=3)
8 “Work all metro—school no Metro“ (WORK_COMMUTER=2) AND (SCHOOL_COMMUTER=4)
9 “Work some Metro – school non-commuter“ (WORK_COMMUTER=3) AND (SCHOOL_COMMUTER=1)
10 “Work some Metro – school all Metro“ (WORK_COMMUTER=3) AND (SCHOOL_COMMUTER=2)
11 “Work some Metro – school some Metro“ (WORK_COMMUTER=3) AND (SCHOOL_COMMUTER=3)
12 “Work some Metro – school no Metro“ (WORK_COMMUTER=3) AND (SCHOOL_COMMUTER=4)
13 “Work no Metro—school non-commuter“ (WORK_COMMUTER=4) AND (SCHOOL_COMMUTER=1)
14 “Work no Metro—school all Metro“ (WORK_COMMUTER=4) AND (SCHOOL_COMMUTER=2)
15 “Work no Metro—school some Metro“ (WORK_COMMUTER=4) AND (SCHOOL_COMMUTER=3)
16 “Work no Metro—school no Metro“ (WORK_COMMUTER=4) AND (SCHOOL_COMMUTER=4)

ASK C4A IF WORK_SCHOOL_COMMUTE=03 OR 07 OR 09 OR 10 OR 11 OR 12 OR 15

C4A *[IF WORK_SCHOOL_COMMUTE=03 OR 07 OR 15 DISPLAY:* You indicated that you use Metro for *[RESTORE CS3C]* of the *[RESTORE CS3B]* days you *attend classes outside your home*. On those days when you don’t use Metro, how do you get to school?

[IF WORK_SCHOOL_COMMUTE=09 OR 10 OR 12 DISPLAY: You indicated that you use Metro for *[RESTORE CS2C]* of the *[RESTORE CS2B]* days you work outside your home. On those days when you don’t use Metro, how do you get to *work*?

[IF WORK_SCHOOL_COMMUTE=11 DISPLAY: You indicated that you use Metro for *[RESTORE CS2C+CS3C]* of the *[RESTORE CS2B+CS3B]* days you work and attend class outside your home. On those days when you don’t use Metro, how do you get to work or school?

(READ LIST ONLY IF NECESSARY; ENTER ALL THAT APPLY)
01 DRIVE ALONE
02 CARPOOL (2 OR MORE PEOPLE IN CAR)
03 VANPOOL
04 SEATTLE [SOUTH LAKE UNION] STREETCAR
06 RIDE THE SOUNDER TRAIN
07 RIDE LINK LIGHT RAIL
08 RIDE A SOUND TRANSIT BUS
09 SCHOOL BUS
10 RIDE ANOTHER SYSTEM’S BUS **(SPECIFY)**
11 MOTORCYCLE
12 BICYCLE

13 WALK
15 DRIVE TO PARK & RIDE LOT
16 KING COUNTY WATER TAXI
95 OTHER **(SPECIFY)**
98 **(NEVER READ)** DON'T KNOW
99 **(NEVER READ)** REFUSED

ASK C4B IF [WORK_SCHOOL_COMMUTE=04 OR 08 OR 12 OR 13 OR 14 OR 15 OR 16]

C4B *IF WORK_SCHOOL_COMMUTE = 04 OR 08 OR 12 DISPLAY:* You indicated that you do not use Metro to get to school. How do you typically get to school?

IF WORK_SCHOOL_COMMUTE = 13 OR 14 OR 15 DISPLAY: You indicated that you do not use Metro to get to work. How do you typically get to work?

IF WORK_SCHOOL_COMMUTE = 16 DISPLAY: You indicated that you do not use Metro to get to work or school. How do you typically get to work or school?

(READ LIST ONLY IF NECESSARY; ENTER ALL THAT APPLY)
01 DRIVE ALONE
02 CARPOOL (2 OR MORE PEOPLE IN CAR)
03 VANPOOL
04 SEATTLE [SOUTH LAKE UNION] STREETCAR
06 RIDE THE SOUNDER TRAIN
07 RIDE LINK LIGHT RAIL
08 RIDE A SOUND TRANSIT BUS
09 SCHOOL BUS
10 RIDE ANOTHER SYSTEM'S BUS **(SPECIFY)**
11 MOTORCYCLE
12 BICYCLE
13 WALK
15 DRIVE TO PARK & RIDE LOT
16 KING COUNTY WATER TAXI
95 OTHER **(SPECIFY)**
98 **(NEVER READ)** DON'T KNOW
99 **(NEVER READ)** REFUSED

ASK C10A IF [WORK_SCHOOL_COMMUTE=04 OR 08 OR 12 OR 13 OR 14 OR 15 OR 16]

C10A *IF WORK_SCHOOL_COMMUTE = 04 OR 08 OR 12 DISPLAY:* Overall, how appealing to you personally is the idea of **using** Metro to get to school? Would you say…

IF WORK_SCHOOL_COMMUTE = 13 OR 14 OR 15 DISPLAY: Overall, how appealing to you personally is the idea of **using** Metro to get to work? Would you say…

IF WORK_SCHOOL_COMMUTE = 16 DISPLAY: Overall, how appealing to you personally is the idea of **using** Metro to get to work or school? Would you say…

[SHOW SCALE IN THIS ORDER FROM LEFT TO RIGHT:

VERY APPEALING, SOMEWHAT APPEALING, NOT VERY APPEALING, NOT AT ALL APPEALING, NEITHER]

05 Very appealing
04 Somewhat appealing
02 Not very appealing
01 Not at all appealing
03 NEITHER APPEALING NOR UNAPPEALING
98 DON'T KNOW
99 REFUSED

ASK C10A_1 IF C10A EQ 03, 04, 05

C10A _1 If **convenient transit service** was available to where you would [work/go to school], how likely would you be to **ride** Metro? Use an 11-point scale where "0" means "not at all likely" and "10" means "extremely likely."

00 Not At All Likely
01
02
03
04
05
06
07
08
09
10 Extremely Likely
98 DON'T KNOW
99 REFUSED

ASK C10A _2 IF C10A _1>= 05 AND <98

C10A _2 What is the single most important thing that Metro could do to increase your likelihood of using the bus to get to work or school?

[OPEN-ENDED RESPONSE]

COMMUTER TRAVEL
BASE: COMMUTERS [(COMMUTER=01) OR (COMMUTER=02)]
SKIP TO GW1A IF (COMMUTER=03)

C1 In what geographic area do you *[work / attend school]*?

(READ LIST UNTIL VALID RESPONSE GIVEN; SELECT SINGLE RESPONSE)

01 Downtown Seattle Core **(AS NEEDED:** Downtown is the area between Denny Way on the north to Jackson Street on the South and between I-5 on the East to the waterfront on the west. Downtown does not include SODO, South Lake Union.**)**
00 South Lake Union
02 Other areas surrounding Downtown Seattle (**AS NEEDED:** This includes Pioneer Square, Belltown, International District, Capitol Hill, First Hill, Denny Regrade, and SODO)
11 On the UW **(PRON: YOU-DUB)** campus
03 University District
05 Downtown Bellevue
06 Redmond
12 Renton
13 SeaTac / Airport
07 Other areas in East King County
04 Other areas in North King County
08 South King County
09 Tacoma or other areas in Pierce County
10 Everett or other areas in Snohomish **(PRON: sno-HOE-mish)** County
95 Somewhere else? **(SPECIFY)**
97 VARIES
98 DON'T KNOW
99 REFUSED

C3A How many miles do you travel from home to [work/school] one-way?
(**AS NEEDED:** Please use your best estimate.)

___ ENTER NUMBER OF MILES
94 LESS THAN ONE MILE
95 MORE THAN 90 MILES
97 VARIES
98 DON'T KNOW
99 REFUSED

C3B About how long does that usually take you?
(ENTER A NUMBER IN EACH FIELD - E.G. 0 HOURS/15 MINUTES, 1 HOUR/0 MINUTES, 1 HOUR/15 MINUTES, ETC.)

___ ENTER IN HOURS RANGE **[RANGE: 0-10]**
___ ENTER IN MINUTES **[RANGE: 0-60]**
97 VARIES
98 DON'T KNOW
99 REFUSED

ASK C8A IFC4A = 01, 02, OR 03 OR C4B = 01, 02, 03 INSERT TEXT THAT CORRESPONDS TO COMMUTE MODE AND COMMUTE STATUS.

C8A When you [drive/carpool/vanpool] to [work/school] do you usually park. . .

(READ LIST UNTIL VALID RESPONSE GIVEN)
01 In a garage
02 In a surface lot
03 Paid on-street parking
04 Free on-street parking
05 Free parking lot at [work/school]
95 SOMEWHERE ELSE **(SPECIFY)**
96 DON'T PARK / GOT DROPPED OFF
98 DON'T KNOW
99 PREFER NOT TO ANSWER

ASK C9A IF (C8A = 01, 02, 95)
INSERT TEXT THAT CORRESPONDS TO COMMUTE STATUS.

C9A Do you personally pay for some or all of your parking at [work/school]?
(**AS NEEDED**: Do you pay for **all** or **some** of your parking?)

01 YES, I PAY FOR ALL OF MY PARKING
02 YES, I PAY FOR SOME OF MY PARKING
03 NO
98 DON'T KNOW
99 REFUSED

ASK F3A IF COMMUTER = 01 OR 02 AND ((F1D=01) OR (F1D=02) OR (F1D=03)) OR (F2A=01) OR (F2B_1=01) OR (F1D=05) OR RIDESTAT=03 OR C4B = 01 [METRO RIDERS WHO DO NOT TAKE BUS TO WORK OR SCHOOL]

F3A **[IF COMMUTER = 01 OR 02 AND RIDESTAT = 01 OR 02]** Does your employer or school pay for part or all of your ORCA pass or E-purse?
[IF COMMUTER = 01 OR 02 AND RIDESTAT = 03 OR C4B = 01] Does your employer or school pay for part or all of the cost of an ORCA pass or E-purse?
(**IF YES, READ**: Would that be all or some of the cost?)
(**AS NEEDED:** Would that be your school or your employer?)

01 YES, ALL PAID FOR BY SCHOOL
02 YES, ALL PAID FOR BY EMPLOYER
03 YES, SOME PAID FOR BY SCHOOL
04 YES, SOME PAID FOR BY EMPLOYER
05 NO, NONE PAID FOR BY SCHOOL/EMPLOYER
98 DON'T KNOW
99 REFUSED

CREATE VARIABLE:
SUBSIDY = 01 (FULL SUBSIDY) IF F3A = 01 OR F3A = 02
SUBSIDY = 02 (PARTIAL SUBSIDY) IF F3A = 03 OR F3A = 04 OR FARE_PAYMENT = 07 (U-PASS)
SUBSIDY = 03 (NO SUBSIDY) IF F3A =05
SUBSIDY = 04 (NOT APPLICABLE) IF (F3A >=97)

OVERALL SATISFACTION, LOYALTY / ADVOCACY, GOODWILL
BASE: ALL RESPONDENTS

GOODINT These next questions are about your overall general impressions of Metro.

ASK GW1A IF (RIDESTAT = 01) OR (RIDESTAT=02)

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

(FOLLOW-UP) Would that be very or somewhat (SATISFIED/DISSATISFIED)?

05 VERY SATISFIED
04 SOMEWHAT SATISFIED
02 SOMEWHAT DISSATISFIED
01 VERY DISSATISFIED
03 NEITHER SATISFIED NOR DISSATISFIED / NO OPINION
97 DOES NOT APPLY TO ME
98 DON'T KNOW
99 REFUSED

RANDOMIZE GW5_1 TO GW5_8

GW5 Based on anything you have seen, heard, or directly experienced, please tell me if you agree or disagree with each of the following statements.

(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

GW5_1 When I hear my friends and colleagues talking about Metro, I generally hear positive things.

GW5_2 When I read or hear things about Metro in the media or online, I generally hear positive things. (**AS NEEDED**: By media, I am talking about things like the newspaper, television, and radio. By online, I am talking about things like Internet sites, blogs, Twitter, and Facebook.)

GW5_7 Metro is an agency I like and respect

GW5_8 Metro is an agency I trust

ASK GW5_9 IF RIDESTAT EQ 01 OR 02

GW5_9 I like to be able to say I ride Metro

05 STRONGLY AGREE
04 SOMEWHAT AGREE
02 SOMEWHAT DISAGREE

01 STRONGLY DISAGREE
03 NEITHER AGREE NOR DISAGREE / NO OPINION
98 DON'T KNOW
99 REFUSED

RANDOMIZE GW6 SERIES

GW6 **[INTERVIEWERS READ AS NEEDED] BASED ON ANYTHING YOU HAVE SEEN, HEARD, OR DIRECTLY EXPERIENCED PLEASE TELL ME IF YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS.**

(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

GW6B Metro offers good value for the level of service provided

GW6D Metro provides excellent customer service

GW6E Metro is innovative

GW6G Metro has consistently high standards for the quality of service they provide

GW6H Metro values its customers

05 STRONGLY AGREE
04 SOMEWHAT AGREE
02 SOMEWHAT DISAGREE
01 STRONGLY DISAGREE
03 NEITHER AGREE NOR DISAGREE / NO OPINION
98 DON'T KNOW
99 REFUSED

GW7 Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?

01 I have high expectations of Metro and I am confident that they will continue to provide the best service possible
02 I generally expect high quality service from Metro and I am generally confident that they will provide high quality service
03 I generally expect both good and bad service from Metro and am not fully confident that they will provide the quality of service I would like
04 I have low expectations of Metro and would expect to encounter problems when riding Metro
05 I have very low expectations of Metro and would not ride Metro unless I absolutely had to
98 DON'T KNOW
99 REFUSED

DEMOGRAPHICS
BASE: All Respondents

NEW SECTION FOR TIMING

DEMO Finally, I have some background questions that will be used to help us analyze the results of the study.

D2 May I please get your age?

__ AGE **[RANGE 1-97; NQ TERMINATE IF 1-15 ENTERED (THANK3)]**
98 DON'T KNOW
99 REFUSED

ASK D2A IF D2 98, 99

D2A Would that be....

(READ LIST UNTIL VALID RESPONSE GIVEN)
01 16-17
02 18-19
03 20-24
04 25-34
05 35-44
06 45-54
07 55-64
08 65 or Older
98 DON'T KNOW
99 REFUSED

D1 **[THIS QUESTION CAN BE LEFT BLANK] (ENTER GENDER OF RESPONDENT BY OBSERVATION. READ QUESTION TEXT ONLY IF NECESSARY)**
Are you...

01 MALE
02 FEMALE

D3A Do you have a valid driver's license?

01 YES

02 NO
98 DON'T KNOW
99 REFUSED

D3B How many vehicles in working condition does your household have available?
(**AS NEEDED**: Vehicles include cars, trucks, motorcycles, scooters, etc.)

(ENTER 8 IF 8 OR MORE)

__ ENTER NUMBER OF VEHICLES **[RANGE 0 – 8]**
98 DON'T KNOW
99 REFUSED

ASK D3C IF S3B > 1 AND D3B > 0 AND D3A = 01

D3C Is one of these vehicles available for **your personal use**?

01 YES
02 NO VEHICLES AVAILABLE FOR PERSONAL USE
98 DON'T KNOW
99 REFUSED

DIS1 Do you have a disability that limits your ability to do one or more major life activities?
(**AS NEEDED:** Such as walking or climbing stairs, running errands, hearing announcements, using a computer.)

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

ASK DIS2 IF DIS1 = 1 AND (RIDESTAT=01 OR 02)

DIS2 When you ride the bus, which of the following services do you use?

(READ LIST AND ACCEPT ALL THAT APPLY)
01 Priority seating area
02 Use of the lift or ramp *OR KNEELING BUS*
03 Wheelchair securement area
95 OTHER Other types of assistance to use the bus **(SPECIFY)**
98 DON'T KNOW

99 REFUSED

D4A Are you Spanish, Hispanic, or Latino?

(**READ IF RESPONDENT SEEMS UNSURE**: Are you or were your ancestors Mexican, Puerto Rican, Cuban, Central or South American, or from Spain?)

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

D4B I am going to read a list of race categories. Please choose one or more races you consider yourself to be:

(**IF THEY SAY "HISPANIC" PROBE WITH:** "In addition to Hispanic, what other race categories do you consider yourself to be?" **BEFORE CODING ON LIST AS HISPANIC.**)

(SELECT ALL THAT APPLY)
01 White
02 Black or African American
03 American Indian or Alaskan Native
04 Asian or Pacific Islander
05 MULTI-RACE **(NO NEED TO SPECIFY)**
94 HISPANIC
95 OTHER **(SPECIFY)**
98 DON'T KNOW
99 REFUSED

D5 Is your **total** annual **household** income above or below $35,000 per year?

[IF RESPONDENT STARTS TO SAY "MY INCOME IS…" RE-READ QUESTION]

01 BELOW $35,000 PER YEAR
02 ABOVE $35,000 PER YEAR
98 DON'T KNOW
99 REFUSED

ASK D5A IF D5 EQ 01

D5A Would that be…?

(READ LIST UNTIL VALID RESPONSE GIVEN)

01 Less than $7,500,
02 $7,500 up to $15,000,
03 $15,000 up to $25,000, or
04 $25,000 up to $35,000?
98 DON'T KNOW
99 REFUSED

ASK D5B D5 EQ 02

D5B Would that be…?

(READ LIST UNTIL VALID RESPONSE GIVEN)

01 $35,000 up to $55,000,
02 $55,000 up to $75,000,
03 $75,000 up to $100,000,
04 $100,000 up to $150,000, or
05 $150,000 and up?
98 DON'T KNOW
99 REFUSED

IF SAMPLETYPE = 01 OR 02 (RDD LANDLINE) DO NOT SHOW OPTION 01
IF SAMPLETYPE = 03 (CELLPHONE) DO NOT SHOW OPTION 05

NEWTEL3 Of all the telephone calls that you make and receive do you. . .

01 Only make or receive calls on your cell phone
02 Primarily make or receive calls on your cell phone
03 Use cell phone and landline equally
04 Primarily make or receive calls on your landline
05 Only make or receive calls on your landline
98 DON'T KNOW
99 REFUSED

D8 Metro may be doing other studies in the future. May we contact you again if we do?
(**AS NEEDED:** These could be surveys or focus groups. Your responses to this particular survey will never be connected with you personally.)

01 YES - OKAY TO CONTACT
02 NO - DON'T CONTACT / REFUSED **[SKIP TO THANK]**

IF D8 = 01 ASK D8A

D8A May I have your first name, so we will know who to ask for?
(IF REFUSED, TYPE MR/MRS REFUSED, DEPENDING ON GENDER)

[OPEN END]

ASK D6 IF (D8=1) AND SAMPTYPE = 03 (CELL PHONE)

D6 For our records, I need to verify your telephone number. Is it... [DISPLAY PHONE]?

01 YES
02 NO
98 DON'T KNOW
99 REFUSED

ASK D6A IF D6 = 02

D6A What is your correct telephone number?

____________ **(ENTER CORRECT PHONE NUMBER)**
(TYPE IN 999-999-9999 for refused)