NORTHWEST
RESEARCH GROUP

2013 Rider / Non-Rider Survey
Final Report

Submitted to:
King County Metro Transit

Submitted by:
Northwest Research Group, LLC
June, 2014

[Blank page inserted for pagination purposes.]

TABLE OF CONTENTS

CONTENTS

King County
METRO

LIST OF FIGURES

King County METRO

OVERVIEW

BACKGROUND AND METHODOLOGY

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

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

- Track customer awareness and perceptions of Metro services and programs

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

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

Sampling

The 2013 survey was based on a random telephone (landline and cell phone) sample of 2,414 King County residents aged 16 and older. In general, in even-numbered years only Regular and Infrequent Riders are interviewed; in odd-numbered years both Riders and Non-Riders are included. Definitions of the three segments are provided below.

Regular Riders
n = 1,207

- Five or more one-way trips on a Metro bus or streetcar in the 30 days preceding the survey.

Infrequent Riders
n = 188

- One to four one-way trips on a Metro bus or streetcar in the 30 days preceding the survey.

Non-Riders
n = 1,019

- Zero trips on a Metro bus or streetcar in the 30 days preceding the survey.

Regular Riders were further segmented based on the number of one-way trips they took:

Frequent Regular Riders
n = 776

Moderate Regular Riders
n = 420

- Eleven or more one-way trips on a Metro bus or streetcar in the 30 days preceding the survey.

- Five to 10 one-way trips on a Metro bus or streetcar in the 30 days preceding the survey.

Eleven (11) respondents classified as Regular Riders did not provide an absolute number of one-way rides taken in the past 30 days. Therefore they are not included in the Frequent or Moderate Regular Rider classifications, and the sum of these two segments (n=1,196) is less than total Regular Riders (n = 1,207).

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

Two out of five completed surveys were drawn from the cell phone sample. More than two out of five (41%) respondents reported that they either only or primarily use a cell phone.

Inclusion of cell phone sample ensures a more representative sample. Figure 131 in the Appendix provides insights into the demographic differences of those interviewed within each sample type.

	2010	2011	2012	2013
Cell Phone Sample	254 22%	759 30%	536 44%	976 40%
Landline Sample	886 78%	1762 70%	682 56%	1,438 60%
Total	1,140	2,521	1,218	2,414

---

[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. Approximately equal numbers of interviews were completed with respondents who are Regular Riders and Infrequent / Non-Riders in each area.

	Total	Regular Riders	Infrequent Riders / Non-Riders
Seattle / North King County	804	402	402
South King County	805	403	402
East King County	805	402	403
Total	2,414	1,207	1,207

Finally, to ensure representation of low-income households (<$35,000 total annual household income), supplemental sampling was undertaken; 27 percent of the interviews where respondents provided their household income met this definition, roughly in proportion to the general population (25%).
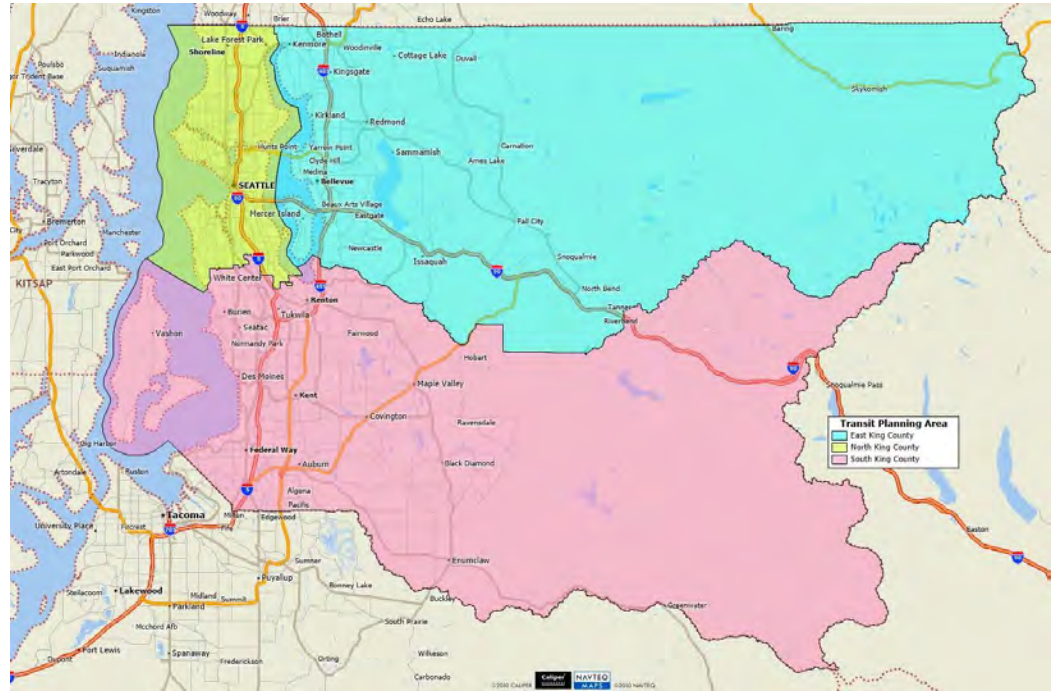
	n =	% in Sample	% in Population
Below $35,000	623	27%	25%
$35,000 or Above	1,653	73%	75%
Unknown Income	138		
Total	2,414		

King County METRO

Data were weighted based on the sampling plan and how the data are reported. Three separate weights were computed.

- Every survey year a Household Weight (HHWGT) is computed that is based on all households contacted, including those not completing the entire survey due to specifications in the sample plan. Reported household ridership was kept for every household contacted. This weight is used to weight the data file that contains all contacts (both completed interviews and those who completed the screening questions only). The all contacts data file is used to compute market share.

- Every survey year a (RIDERWGT is computed based on all Riders (Regular and Infrequent) in the final sample. This weight is applied to those questions asked only of Riders or a subset of Riders.

- In survey years where both Riders and Non-Riders are surveyed, a Respondent Weight (RESPWGT) is computed. This weight is applied to those questions asked of all respondents or subsets of all respondents.

Full documentation of the weighting procedures is provided to Metro separately. Figure 130 in the Appendix provides a demographic profile of all respondents, weighted and unweighted, compared to the general population in King County.

Using a 95 percent confidence level, the margin of error of the entire sample is plus or minus 2.0 percentage points. The table to the right provides the margin of error for key subgroups in the study.

Both weighted and unweighted sample sizes for 2013 are shown in the report. Data from previous years are merged for trend analysis. A detailed table is included in the Appendix that provides weighted and unweighted sample sizes for each major subgroup for each year.

	n	Margin of Error 95% Confidence Level
Total	2,414	+ or – 2.0%
Planning Areas	804 - 805	+ or – 3.5%
All Riders	1,395	+ or – 2.6%
Regular Riders	1,207	+ or – 2.8%
Frequent Regular Riders*	776	+ or – 3.5%
Moderate Regular Riders*	420	+ or – 4.8%
Infrequent Riders	188	+ or – 7.1%
Non-Riders	1,019	+ or – 3.1%
Eleven (11) respondents qualified as Regular Riders did not provide an absolute number of one-way rides taken in the past 30 days. Therefore they are not included in the Frequent or Moderate Regular Rider classifications, and the sum of these two segments (n=1,196) is less than total Regular Riders (n = 1,207).		

Survey Instrument

The interviews averaged 20.5 minutes. The survey was significantly longer for Regular and Infrequent Riders (24.3 and 23.4 minutes, respectively) than for Non-Riders (15.5 minutes). The survey covered the following major topic areas.

Riders
- Transit use
  - Frequency of riding
  - Transit dependency
  - Trip purpose
  - Length of ridership
- Satisfaction with service
  - Overall
  - With individual elements of service
- Information
  - Primary sources of information on routes and schedules
  - Satisfaction with sources of information
- Service change information

Non-Riders
- Ridership
  - Former Metro ridership
  - Use of other regional transit services
- Perceptions of Metro and Metro's transit service
  - Barriers to riding
- Potential ridership

All Respondents
- Household ridership
- Individual transit use
- Safety and security
- Commuter status and travel behavior
- Perceptions of downtown Seattle
- Goodwill and "brand equity"
- Demographics

Interviews were conducted in English and Spanish. One hundred twenty (120) respondents identified themselves as Hispanic. Twenty-two (22) Hispanic respondents chose to do the survey in Spanish. As the demographic table (Figure 130) in the Appendix shows, Hispanics as well as Asians are under-represented in the sample relative to their incidence in the general population. The under-representation of Asians may be due in part to the survey being conducted only in English and Spanish. In future surveys, supplemental sampling similar to what is done to reach low-income households could be used to try to increase representation of these groups.

Analysis and Reporting

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

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

For every figure or table, the specific question number / 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 of the respondents asked the question—is also provided. The base for a question may vary based on answers to previous questions or inclusion in specific analytical groups—for example Riders versus Non-Riders. Unless otherwise noted, the results in this report are based on the final weighted sample data although actual cell sizes were used to determine statistically significant differences and reliability. Both the weighted and unweighted sample sizes for each question are included.

This report also identifies differences that are statistically significant. If a particular difference is large enough to be unlikely to have occurred due to chance or sampling error, the difference is statistically significant. Statistical significance was tested at the 90% and 95% confidence levels. Significant differences are pointed out in the report text and identified in tables and charts using standard statistical notations whereby uppercase letters indicate significant differences from the column noted at the 95 percent confidence level and lowercase letters indicate significance at the 90 percent level. For example in the table below, the percentage of new riders in Seattle / North King County is statistically greater at the 95 percent confidence level in 2009 than in 2011 and 2012. The percentage of new riders in Seattle / North King County is statistically greater at the 95 percent confidence level in 2010 than in 2011 and at the 95 percent confidence level between 2010 and 2012.

Trends in % New Riders—Seattle / North King County					
	2009	2010	2011	2012	2013
	(A)	(B)	(C)	(D)	(E)
Seattle / N. King	17%	15%	11%	10%	12%
	(CDE)	(cD)			

Throughout this report, in tables showing results from year to year, colored arrows are used to highlight statistically significant changes from the previous year. The direction of the change year to year is indicated by the direction and color of the arrow. For example, in the table below, the percentage of new riders decreased between 2011 and 2012 and that difference is significant at the 90% confidence level as indicated by the ↓. The percentage decreased again between 2012 and 2013: the difference between 2012 and 2013 is significant at the 95% confidence level as indicated by the ↓. Similarly, year over year increases at the 90% confidence level are indicated by ↑, while year over year increases at the 95% confidence level are indicated by ↑.

Trends in % New and Experience Riders—South King County					
	2009	2010	2011	2012	2013
New Riders	27%	22%	21%	17%↓	12%↓
Experienced Riders	73%	78%	79%	83%↑	88%↑

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

EXECUTIVE SUMMARY

MARKET SHARE

What We Found	What It Means
Metro began to gain significant market share in 2011. The percentage of Non-Rider households has fallen to an all-time low—decreasing from 65% in 2011 to 55% in 2013. Rate of growth in market share has varied across the county. - The percentage of Regular Rider households increased significantly between 2011 and 2012 in the former Seattle / North King County planning area—from 41 percent to 53 percent, respectively. Overall market share in this area decreased somewhat in 2013 to 47 percent while share of Infrequent Rider households increased from 11 percent to 14 percent. - The percentage of Regular Rider households increased significantly in the South King County former planning area between 2010 and 2011—from 14 percent to 19 percent, respectively—and again between 2012 and 2013—from 19 percent to 28 percent, respectively. - The percentage of East King County Regular Rider households grew from 17 percent in 2011 to 23 percent in 2013.	A growing economy has contributed significantly to this growth—with the percentage of King County residents commuting to work outside their homes at least three days a week increasing from 53 percent in 2009 to 57 percent in 2013. In addition, commuters are increasingly choosing Metro to travel to work—the percentage of Work Commuters using Metro increased from 16 percent in 2011 to 24 percent in 2013. While commuters and commute trips represent Metro's core market, incremental non-work trips by commuters as well as trips by non-commuters also represent significant opportunities for additional growth both in market share and number of trips.

Market Share--2009 to 2013

Legend:
- Regular Rider Household
- Infrequent Rider Household
- Non-Rider Household

Year	Regular Rider	Infrequent Rider	Non-Rider
2009	24%	13%	64%
2010	25%	13%	62%
2011	26%	9%	65%
2012	33%	7%	60%
2013	34%	11%	55%
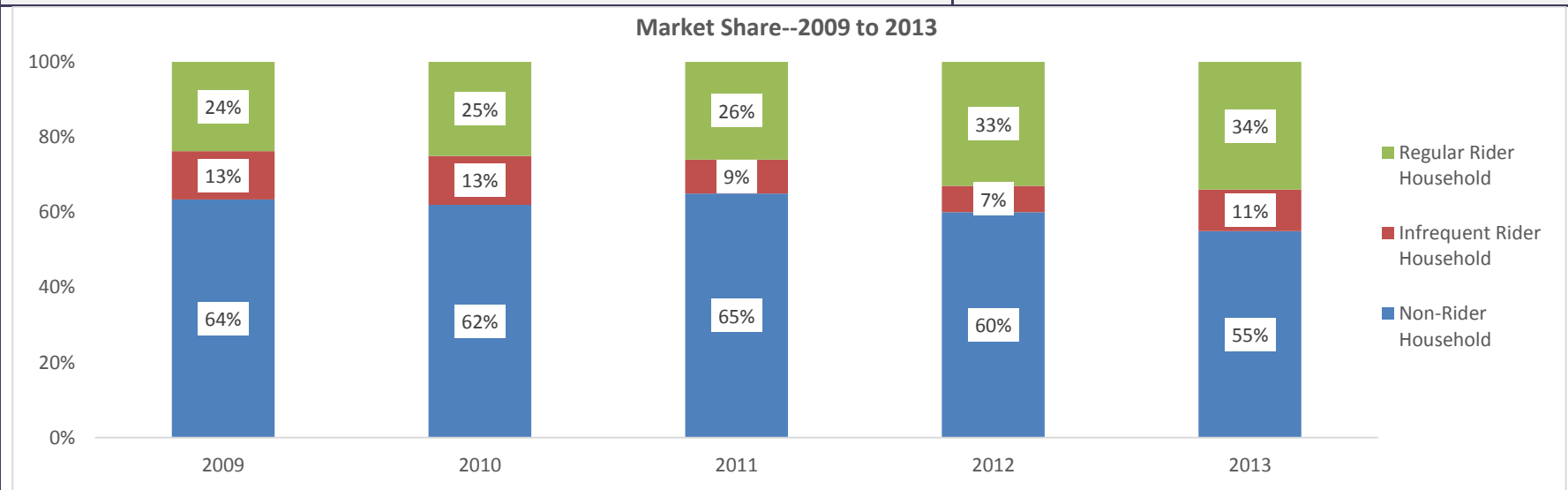
Base: All Contacts. Columns may sum to more or less than 100% due to rounding.

King County METRO

RIDER RETENTION

What We Found	What It Means
In 2009 and 2010 a significantly higher percentage of Riders were new to the system than in 2011 and subsequent years. The percentage of new Infrequent Riders decreased significantly between 2009 and 2010 and again between 2012 and 2013. The percentage of new Riders living in South King County decreased between 2011 and 2012 and again between 2012 and 2013.	Ridership (defined by boardings) on Metro decreased between 2009 and 2010 and began to rise in 2011. Increased ridership in the past three years appears to be a combination of retaining existing Riders while at the same time attracting a steady stream of new Riders. The increase in the percentage of Infrequent Rider households noted in 2013 appears to be due primarily to past riders returning to the system. The significant growth in market share in South King County noted for 2013 is in large part due to Former Riders returning to the system and greater Rider retention.

	2009	2010	2011	2012	2013
All Riders					
New Riders	21%	18%	14%↓	13%	12%
Experienced Riders	79%	82%	86%↑	87%	88%
Regular Riders					
New Riders	18%	20%	13%↓	13%	16%
Experienced Riders	82%	80%	87%	87%	84%
Infrequent Riders					
New Riders	26%	13%↓	16%	13%	6%↓
Experienced Riders	74%	87%↑	84%	87%	94%↑
Seattle / North King County					
New Riders	17%	15%	11%↓	10%	12%
Experienced Riders	83%	85%	89%↑	90%	88%
South King County					
New Riders	27%	22%	21%	17%↓	12%↓
Experienced Riders	73%	78%	79%	83%↑	88%↑
East King County					
New Riders	29%	22%↓	16%↓	20%	15%
Experienced Riders	71%	78%↑	84%↑	80%	85%

Base: All Riders. New riders started to ride after September prior to the survey year; experienced riders started riding prior to September of the preceding year.
↓↑ indicates a statistically significant (90% or 95%) decrease or increase in the percentage from one or more of the preceding years.

RIDER SATISFACTION

What We Found	What It Means
Satisfaction with Specific Elements of Service: Rider satisfaction has increased significantly over the past several years on a number of specific elements of service that have been identified as significant drivers of overall customer satisfaction.	New services such as RapidRide, better scheduling, changes to fare payment policies, and driver training have all contributed to this success. There should be continued focus on these areas as they continue to be significant drivers of customers' overall perceptions of and satisfaction with Metro. In addition, most of these elements of service receive ratings that are near or below the 50% very satisfied mark.

Significant Changes in % Very Satisfied 2011 - 2013

Categories: Drivers Effectively Handle Problems (49%, 60%, 64%); Value of Service (56%, 62%); Service Availability (41%, 46%, 51%); Ease of Getting On/ Off Bus due to Crowding at Stops (35%, 48%); Availability of Seating on Bus (42%, 40%, 47%); On-Time Performance (33%, 42%, 46%); Frequency of Service (36%, 41%, 45%); Travel Time (32%, 41%, 43%); Wait Time when Transferring (24%, 27%, 35%); Ease of Getting On / Off Due to Crowding on Bus (25%, 23%, 29%)

Legend: 2011, 2012, 2013

Base: All Riders

What We Found	What It Means
Overall Satisfaction: Despite the improvements in customer satisfaction with individual elements of service, overall customer satisfaction has decreased over the last few years—from 94 **percent** total satisfied in 2010 to 85 **percent** in 2013. While overall satisfaction has decreased for all rider segments, the decrease is greatest among Infrequent Riders. Additionally, the percent very satisfied decreased significantly for Moderate Regular Riders.	The decrease in overall satisfaction appears to be affected by factors other than satisfaction with service. Moreover, overall satisfaction is based in part on how well Metro meets Riders' overall transportation needs. Other analysis in the report suggests that external influences—word of mouth and the media—have an impact on overall customer satisfaction. Metro should make use of traditional and social media to spread the word about positive improvements to service to offset the oftentimes negative publicity from the media and on the Internet. Compared to Frequent Regular Riders, the lower overall satisfaction among Moderate Regular and Infrequent Riders may influence their decision to ride more frequently.

Overall Satisfaction 2010 - 2013

All Riders

	2010 (A)	2011 (A)	2012 (A)	2013 (A)
Very Satisfied	49%	50%	46%	42%
Somewhat Satisfied	45%	41%	42%	43%
Neutral* / Dissatisfied	6%	9%	12%	15%

Frequent Regular Riders

	2010 (FR)	2011 (FR)	2012 (FR)	2013 (FR)
Very Satisfied	52%	58%	49%	47%
Somewhat Satisfied	44%	35%	42%	42%
Neutral* / Dissatisfied	4%	7%	10%	11%

Moderate Regular Riders

	2010 (MR)	2011 (MR)	2012 (MR)	2013 (MR)
Very Satisfied	49%	45%	47%	38%
Somewhat Satisfied	43%	44%	38%	48%
Neutral* / Dissatisfied	8%	11%	15%	13%

Infrequent Riders

	2010 (IF)	2011 (IF)	2012 (IF)	2013 (IF)
Very Satisfied	46%	42%	43%	37%
Somewhat Satisfied	46%	47%	45%	42%
Neutral* / Dissatisfied	8%	11%	12%	21%

*Base: All Riders. Columns may sum to more or less than 100% due to rounding. *Neutral is included with dissatisfied and is generally less than 1–2%.*

King County METRO

What We Found	What It Means
Key Drivers: Out of the nine overall dimensions of service, five are the most important contributors to overall perceptions of and satisfaction with Metro: • Level of service / reliability • Metro information sources • Safety and security • Transferring • Comfort while riding With the exception of Metro information sources, rider satisfaction is below the overall average for these five dimensions. Within each of these five important overall service dimensions, specific elements of service were identified that are important contributors to overall perceptions of and satisfaction with Metro and the percentage of very satisfied riders is below 50 percent.	Many of those elements identified as key drivers and that have below-average customer satisfaction ratings are the same as those identified in the past. While there have been significant improvements in some of these areas (page 17), Metro should continue to focus its service improvement efforts in these areas. Particular focus should be on: • Frequency of service and on-time performance • Safety after dark as well as daytime safety on buses and streetcars and safety in the downtown transit tunnel • Wait time when transferring • Overcrowding on the buses and streetcars

Level of Service / Reliability		Metro Information Sources		Safety & Security		Transferring		Comfort While Riding	
Service Element	**% Very Satisfied**	**Service Element**	**% Very Satisfied**	**Service Element**	**% Very Satisfied**	**Service Element**	**% Very Satisfied**	**Service Element**	**% Very Satisfied**
Frequency of service	45%	Accuracy of timetables	44%	Safety riding after dark	30%	Wait time when transferring	38%	Overcrowding	29%
On-time performance	46%	Service change notifications	41%	Safety waiting after dark	31%	Number of transfers	44%	Inside cleanliness	46%
				Safety in transit tunnel	48%			Availability of seating	47%
				Daytime safety riding	51%			Ease of getting on / off	48%
Base: All Riders									

King County METRO

SAFETY AND SECURITY

What We Found	What It Means
Safety both on and off the bus after dark continues to be a major concern for riders. Moreover, the percent of Riders who are very satisfied with daytime safety has been slowly eroding. After significant improvements in satisfaction with safety in the downtown transit tunnel between 2010 and 2012, the percentage of Riders very satisfied dropped sharply in 2013.	Safety and security while riding and while waiting for the bus or streetcar are significant factors in Riders' overall perceptions of Metro as well as a significant influence on Non-Riders' decision to ride. These negative trends should be carefully monitored and proactive measures taken to improve security. Particular attention should be paid to routes serving riders living in South King County where these decreases in satisfaction are greatest.

% Very Satisfied

Base: All Riders. Columns may sum to more or less than 100% due to rounding.

What We Found	What It Means
While Riders continue to generally agree that Metro provides a safe and secure transportation environment, they are less likely to agree that Metro is focused on safety. This is noteworthy among Riders living in Seattle / North King County who are more likely than those in other areas of the county to say that they do not feel safer riding Metro now than a year ago and are also less likely to agree that Metro has been proactive in improving safety and security.	Like satisfaction, Riders' perceptions of Metro's efforts to improve safety and security have eroded somewhat. This may be due in part to several highly publicized incidents right before and during the 2013 survey period. Metro should also work with the local media—both traditional and social—to tell a more positive story regarding its efforts to improve safety and security. This could serve to counter-balance the relatively infrequent but highly visible stories of incidents related to safety on the buses.
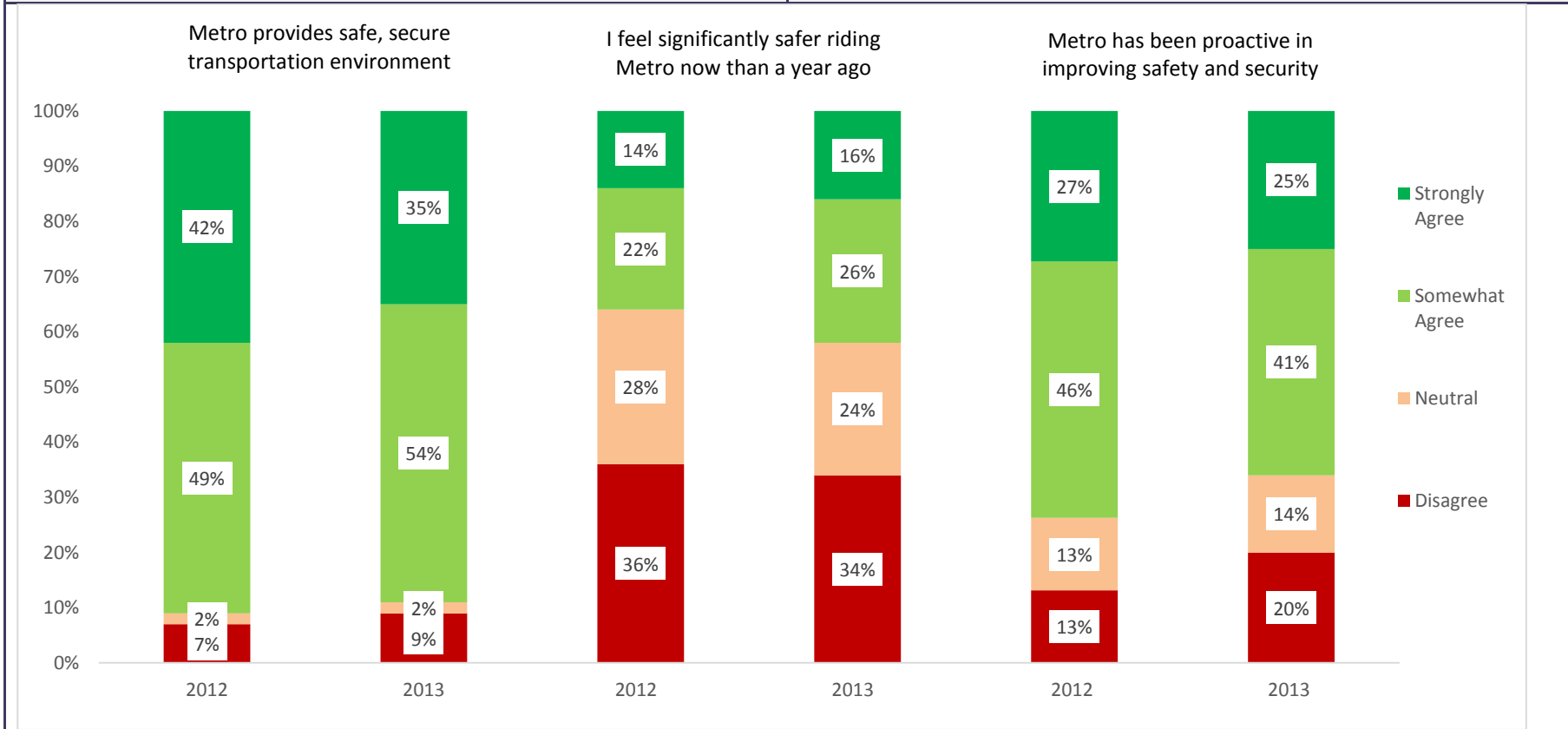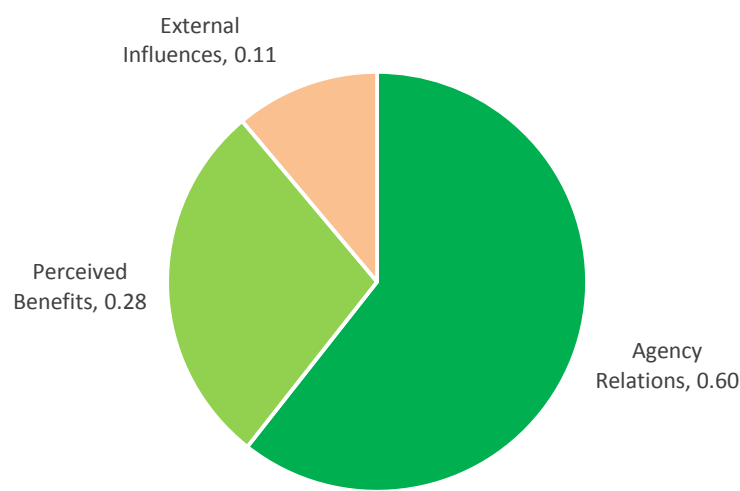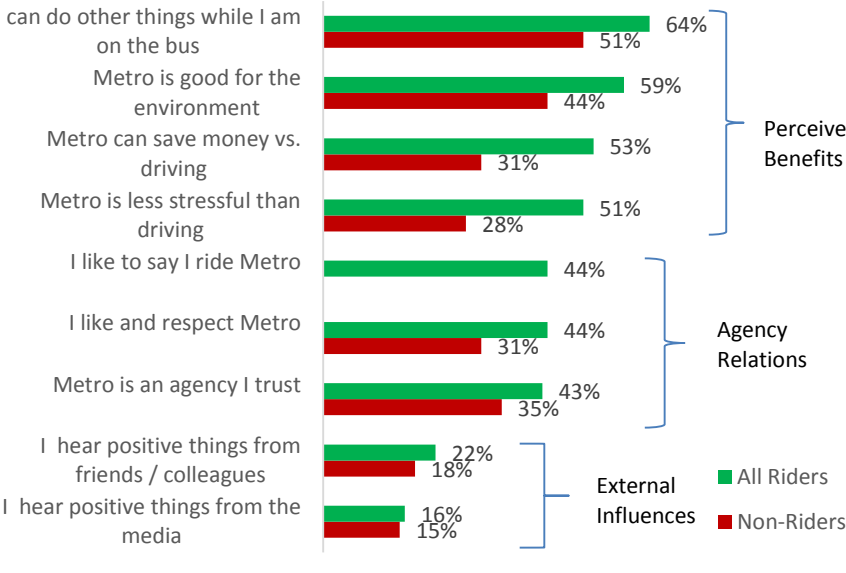
Base: All Riders. Columns may sum to more or less than 100% due to rounding.

GOODWILL

What We Found	What It Means
New questions were added in 2013 to assess Riders' and Non-Riders' perceptions of Metro. Responses to these questions were combined to create an overall index of goodwill toward Metro. The majority of Riders and Non-Riders report that they both expect and feel they receive—or in the case of Non-Riders would receive—high quality service.	This measure suggests a strong core of overall support for Metro that can be used to gain support for changes in policies or requests for additional support in the future. At the same time, there is a significant percentage of Riders and Non-Riders who have mixed or negative perceptions. In the case of Riders, this may cause them to ride less often than they might otherwise. In the case of Non-Riders, this may impact their willingness to ride as well as support Metro in other ways. Gaining a better understanding of the gap between expectations and delivery may identify ways to improve this measure.

Base: All Respondents

What We Found	What It Means
Three factors combine to affect Riders' and Non-Riders' overall perceptions of the extent to which Metro meets their needs and expectations	Marketing communications is key to building positive perceptions of Metro.
The greatest contributor to respondents' perceptions of Metro is agency relations, and the extent to which Riders and Non-Riders trust Metro is by far the most important aspect of agency relations.	Metro should work with the media as well as use its own social media network to provide positive stories about Metro to counterbalance the negative publicity received in the event of often isolated events.
Perceived benefits to riding vary significantly between Riders and Non-Riders. Notably, Non-Riders do not feel that Metro can save them money or that it is less stressful than driving.	Promoting the positive benefits of being good for the environment while reducing stress will reach both Riders and Non-Riders.
While less important, Riders and Non-Riders suggest that they are hearing mixed or generally negative comments about Metro from people they know and the media.	

Level of Contribution to Overall Perceptions of Metro

External Influences, 0.11

Perceived Benefits, 0.28

Agency Relations, 0.60

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each element of goodwill on overall perceptions of and satisfaction with Metro

% Strongly Agree

	All Riders	Non-Riders	
I can do other things while I am on the bus	64%	51%	Perceived Benefits
Metro is good for the environment	59%	44%	
Metro can save money vs. driving	53%	31%	
Metro is less stressful than driving	51%	28%	
I like to say I ride Metro	44%		Agency Relations
I like and respect Metro	44%	31%	
Metro is an agency I trust	43%	35%	
I hear positive things from friends / colleagues	22%	18%	External Influences
I hear positive things from the media	16%	15%	

Base: All Respondents

What We Found	What It Means
An overall metric of goodwill was computed using a weighted index of the three individual components. Metro has a relatively high degree of goodwill as indicated by a goodwill metric of 3.98 (on a five-point scale).	Metro has a reasonably strong reservoir of goodwill to build on. Stronger relations with the media could further enhance Metro's goodwill.

Relations with Agency = 4.04

Perceived Benefits = 4.08

Metro's Goodwill = 3.98

External Influences = 3.32

Base: All Respondents

King County METRO

SERVICE CHANGES

What We Found	What It Means
Riders are generally satisfied with Metro's communications about changes to service. For those who were less than very satisfied, communications regarding the reason for the change are a greater problem than the timeliness of the notifications.	Metro should continue to be open and transparent with information about the reasons for proposed or upcoming service changes.

Overall Satisfaction with Notification of Service Changes

Satisfaction with Specific Aspects of Notifications

Somewhat Satisfied 44%

Very Satisfied 41%

Dissatisfied 12%

Neutral 3%

Timeliness of Notifications: 12%, 5%, 71%, 12%

Communication of Reason for Changes: 24%, 7%, 57%, 12%

Legend: Very Satisfied, Somewhat Satisfied, Neutral, Dissatisfied

Base: All Riders

Base: Riders less than very satisfied with overall notification of service changes

What We Found	What It Means
Riders currently get information about service changes via traditional sources such as notices on the bus or at stops and, to a lesser extent, Metro's website. While they would like to continue to get information via these traditional sources, a significant percentage would like to get information via email, and a significant percentage volunteered that they would prefer to get notifications regarding service changes from an app on their smartphone. Nearly all Metro Riders (93%) indicate an interest in providing input on upcoming service changes. Most Riders prefer providing input via Metro's website or email.	While Metro should continue to use traditional sources to reach out to riders about service changes, more direct approaches via email or pushing information to an app on an individual's smartphone are increasingly preferred. These messages can be highly personalized and can potentially avoid unnecessary communications to unaffected Riders.

Current and Preferred Sources of Information on Service Changes

On Buses / At Stops: 74% (% Current), 41% (% Preferred)
Online: 37% (% Current), 28% (% Preferred)
Media: 28% (% Current), 18% (% Preferred)
Email: 11% (% Current), 23% (% Preferred)
App on Smartphone: 6% (% Preferred)

■ % Current
■ % Preferred
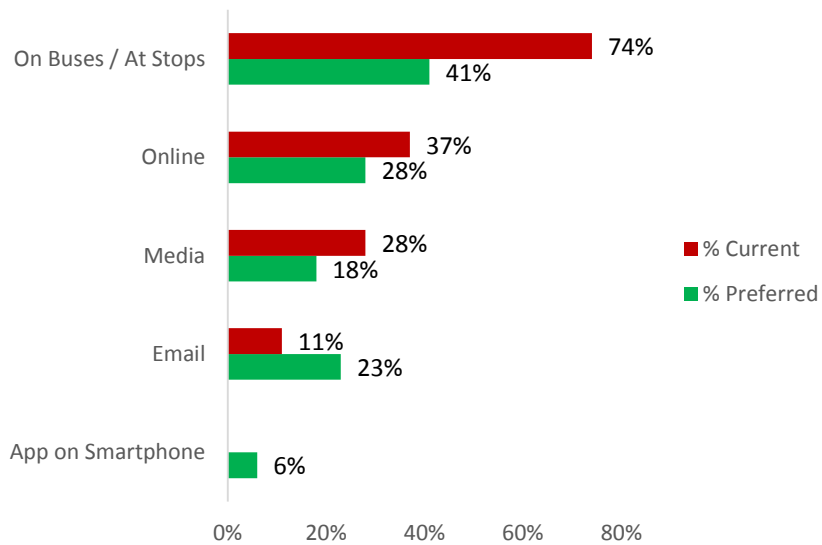
Base: All Riders

Preferred Ways to Provide Input

Metro Online: 39%
Email: 38%
Phone: 14%
Town Hall Meeting: 7%
Social Media: 8%
Survey: 3%
Don't Wish to Provide Input: 7%

■ % Prefer
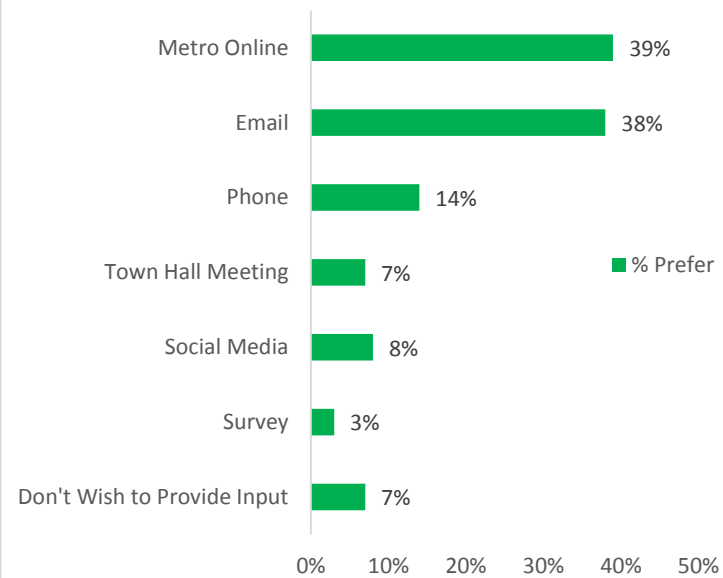
Base: All Riders
Sums to more than 100%; multiple responses allowed

DETAILED FINDINGS—MARKET SHARE

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

Topic	Key Findings	Key Stats	What It Means
Overall	The percentage of Rider households in King County has increased significantly over the past three years—from 35 percent in 2011 to 45 percent in 2013. There are currently an estimated 277,485 Regular Rider households and an additional 87,755 Infrequent Rider households. In 2012, the increase in market share was attributed to a significant increase in the percentage of Regular Rider households. The current (2013) increase is primarily attributable to an increase in Infrequent Rider households.	**2011** **2012** **2013** **Regular Rider Households** 26% 33%↑ 34% **Infrequent Rider Households** 9% 7% 11%↑ **Non-Rider Household** 65% 60%↓ 55%↓ *Indicates significant increase (↑) or (↓) from previous year*	Metro's ridership growth over the past several years is due to the agency's success in attracting riders from formerly Non-Rider households as well as retaining existing riders.
Share of Population	In many instances, there are multiple riders per household—28 percent of King County households have two or more Regular Riders. Using the number of individual riders reported, it is possible to provide an estimate of the percent of the population 16 years of age and older who ride Metro. One out of four (24%) King County residents who are 16 years of age or older are Regular Riders, and an additional 15 percent are Infrequent Riders.	**% of Population 16+ Who Are . . .** **Riders** **Regular Riders** **Infrequent Riders** **All King County** 39% 24% 15% **Seattle / North King County** 57% 38% 19% **South King County** 30% 18% 12% **East King County** 29% 15% 14%	Residents living in Seattle / North King County represent Metro's core market—while this area represents approximately one-third (35%) of the region's adult population, more than half (55%) of Metro riders live in this area. At the same time, Metro meets the transportation needs of a significant number of people throughout the County.

King County METRO

Topic	Key Findings	Key Stats			What It Means
Seattle / N. King County	The **Seattle / North King County** former planning area continues to represent Metro's core base of Riders. Three out of five (61%) households in this region have one or more Regular or Infrequent Riders. Current share of Rider households in this area declined slightly in 2013.	**2011** **2012** **2013** **Regular Rider Households** 41% 53% 47% **Infrequent Rider Households** 14% 11% 14% **Non-Rider Households** 45% 36% 39%			Frequent and direct service to major destinations coupled with issues with parking and congestion combine to encourage ridership in this area. However, the introduction of alternative transportation services such as Car2Go may be a factor in the small loss in market share in Regular Rider households. Ridership trends in this area should be monitored to ensure that the small changes noted in 2013 do not continue.
South King County	Market share increased significantly in the **South King County** former planning area. Growth in market share in this region is due to a significant increase in the percentage of Regular Rider households and, to a lesser extent, Infrequent Rider households.	**2011** **2012** **2013** **Regular Rider Households** 19% 19% 28% **Infrequent Rider Households** 4% 4% 7% **Non-Rider Households** 77% 77% 65%			After relatively little change over the years, interest in riding among residents of South King County has increased significantly potentially due to new services and changing residential development in the area. This is the most diverse area of the county and riders are likely to have unique needs for service throughout the day.
East King County	Market share also increased significantly in the **East King County** former planning area. Growth in market share in this region is due to a significant increase in the percentage of Infrequent Rider households.	**2011** **2012** **2013** **Regular Rider Households** 17% 22% 23% **Infrequent Rider Households** 9% 6% 11% **Non-Rider Households** 74% 72% 66%			New services and changing residential development in East King County may be contributing to growth in market share in this region. Increased tolling as well as ongoing construction on 520 may also encourage greater use of Metro. The majority of Riders are using Metro for commute trips. Encouraging commuters in this area to use Metro for incremental commute trips could have a significant impact on ridership.

Figure 1: 2013 Market Share by Former Planning Subareas

One out of three (34%) King County households have at least one Regular Rider, translating to an estimate 277,485 total households. Twenty-six percent (26%) of King County households have at least one Infrequent Rider in the household.

- One out of seven (15%) King County households have both Regular and Infrequent Riders.

Number of Households			
Total # of Households	**Rider Households**	**Regular Rider**	**Infrequent Rider**
All King County			
814, 215	365,240	277,485	87,755
Seattle / North King			
316,076	193,439	147,608	45,831
South King			
280,567	98,479	79,400	19,079
East King			
217,572	73,322	50,477	22,845
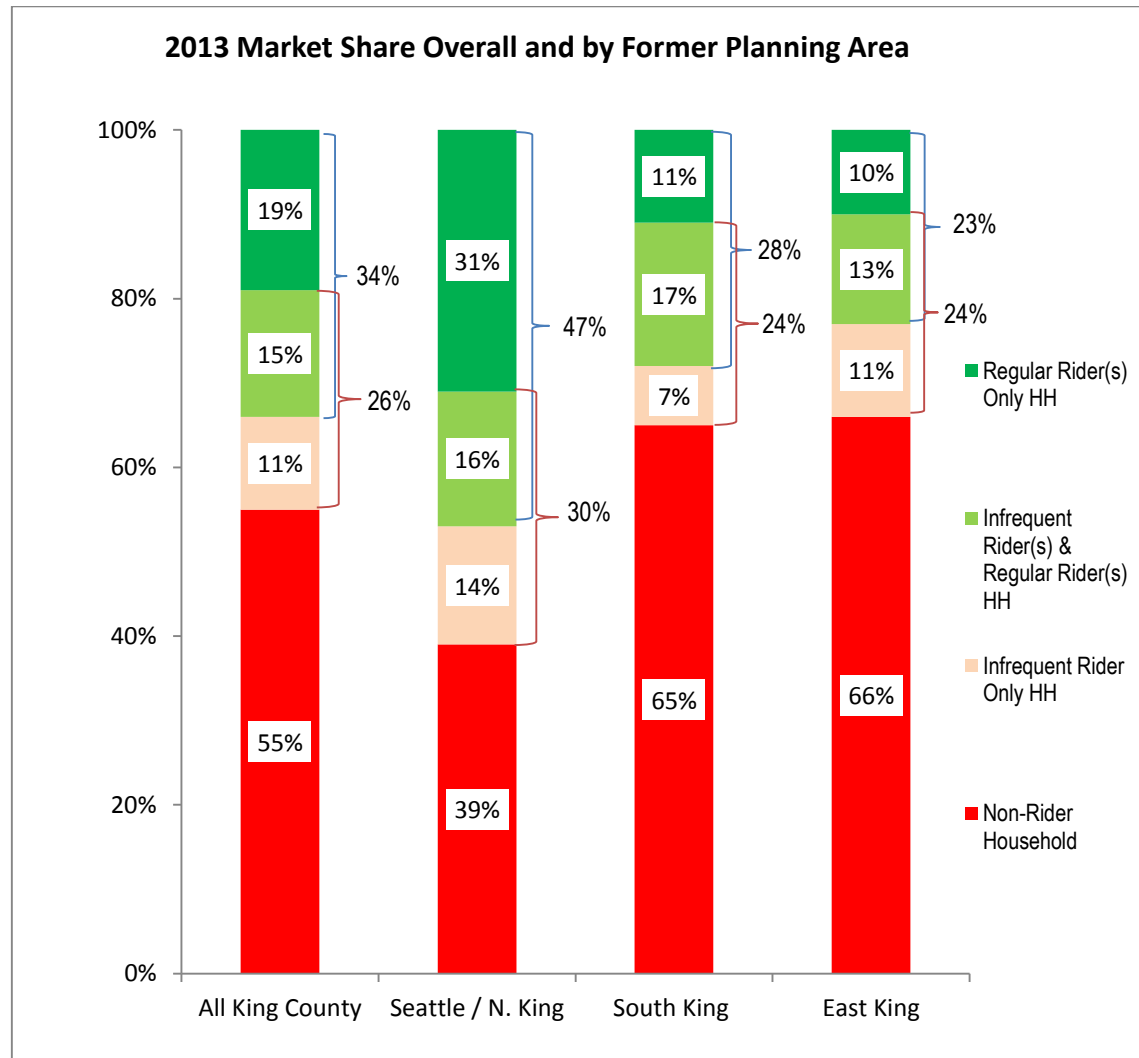
2013 Market Share Overall and by Former Planning Area

Columns may sum to more or less than 100% due to rounding.

Questions: S4A—Including yourself, how many people in your household, age 16 or over, have taken **between one (1) and four (4)** one-way rides on a Metro bus or the South Lake Union Streetcar in the last 30 days?
S4B—Including yourself, how many people in your household, age 16 or over, have taken **at least five (5)** one-way rides on a Metro bus or the South Lake Union Streetcar in the last 30 days?
Base: All contacted households: King County (n = 8,387); Seattle / North King (n = 1,748); South King (n = 3,526); East King (n = 3,113)

Figure 2: King County Rider and Non-Rider Households, 2009 to 2013

While the percentage of Regular Rider households remained relatively stable in 2013, market share continues to grow due in a significant increase in the percentage of Infrequent Rider households. This is notable as the percentage of Infrequent Rider households had been decreasing between 2010 and 2012. The figures in 2013 suggest that this trend has begun to turn around.
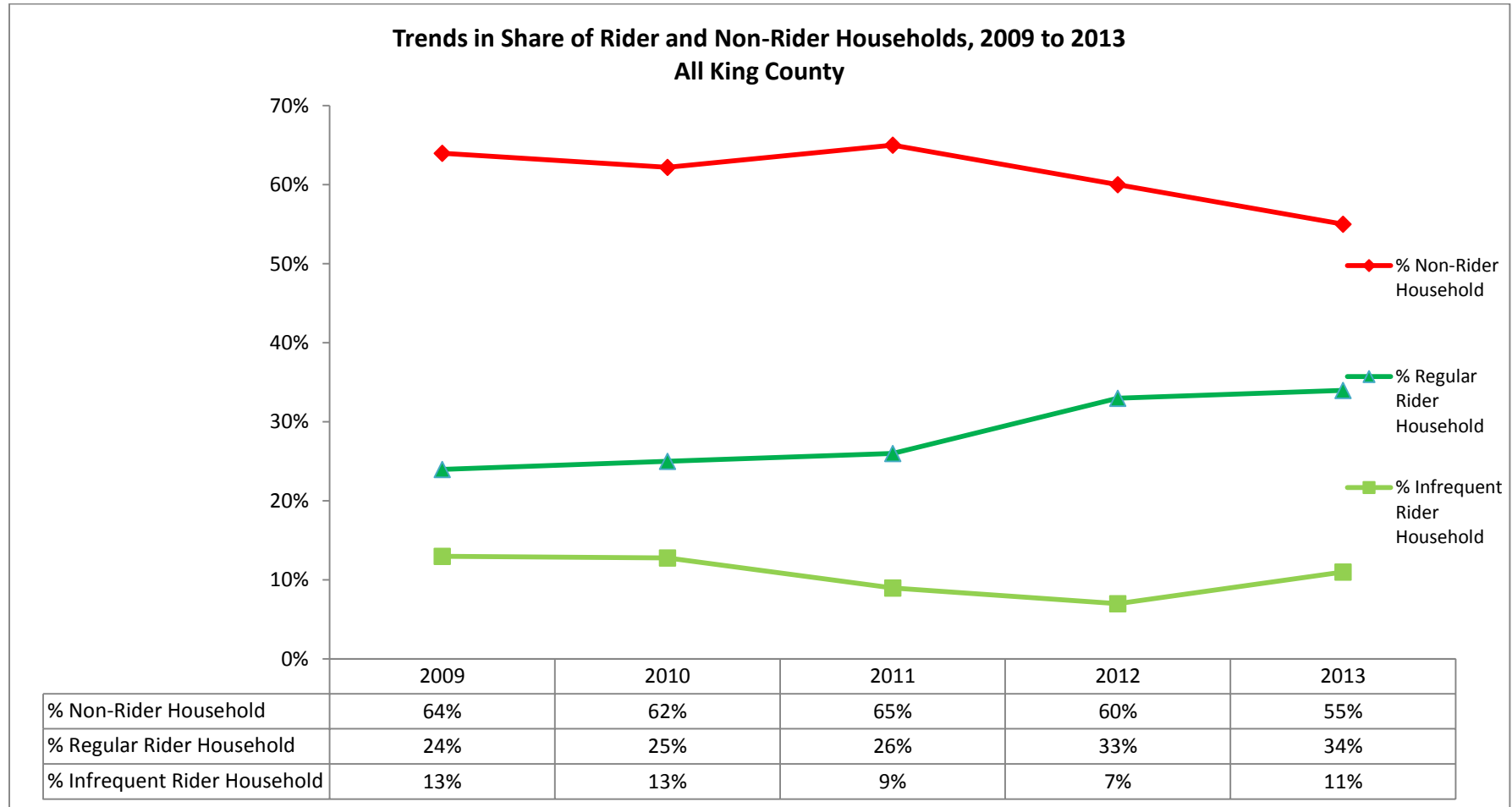
Trends in Share of Rider and Non-Rider Households, 2009 to 2013
All King County

	2009	2010	2011	2012	2013
% Non-Rider Household	64%	62%	65%	60%	55%
% Regular Rider Household	24%	25%	26%	33%	34%
% Infrequent Rider Household	13%	13%	9%	7%	11%

Columns may sum to more or less than 100% due to rounding.

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

*S4B—Including yourself, how many people in your household, age 16 or over, have taken **at least five (5)** one-way rides on a Metro bus or the South Lake Union Streetcar in the last 30 days?*

***Base**: All contacted households; see table on page 214 for sample sizes.*

Figure 3: Trends in Incidence of Regular Rider Households by Area

After a sharp increase in Seattle / North King County Regular Rider households in 2012, market share in this area decreased in 2013. The current figure (47%) remains significantly higher than in previous years.

Market share of Regular Rider households in South King County increased significantly between 2010 and 2011 and remained stable in 2012. In 2013, Regular Rider market share in South King County again increased significantly and is now at its highest level ever. The increase in market share in South King County offset the decrease in Seattle / North King County, leaving overall share unchanged from 2012.

Market share of Regular Rider households in East King County is unchanged from 2012.

Trends in Share of Regular Rider Households
Countywide and by Former Planning Area

	2009	2010	2011	2012	2013
All King County	24%	25%	26%	33%	34%
Seattle / N. King	40%	42%	41%	53%	47%
South King	13%	14%	19%	19%	28%
East King	14%	15%	17%	22%	23%
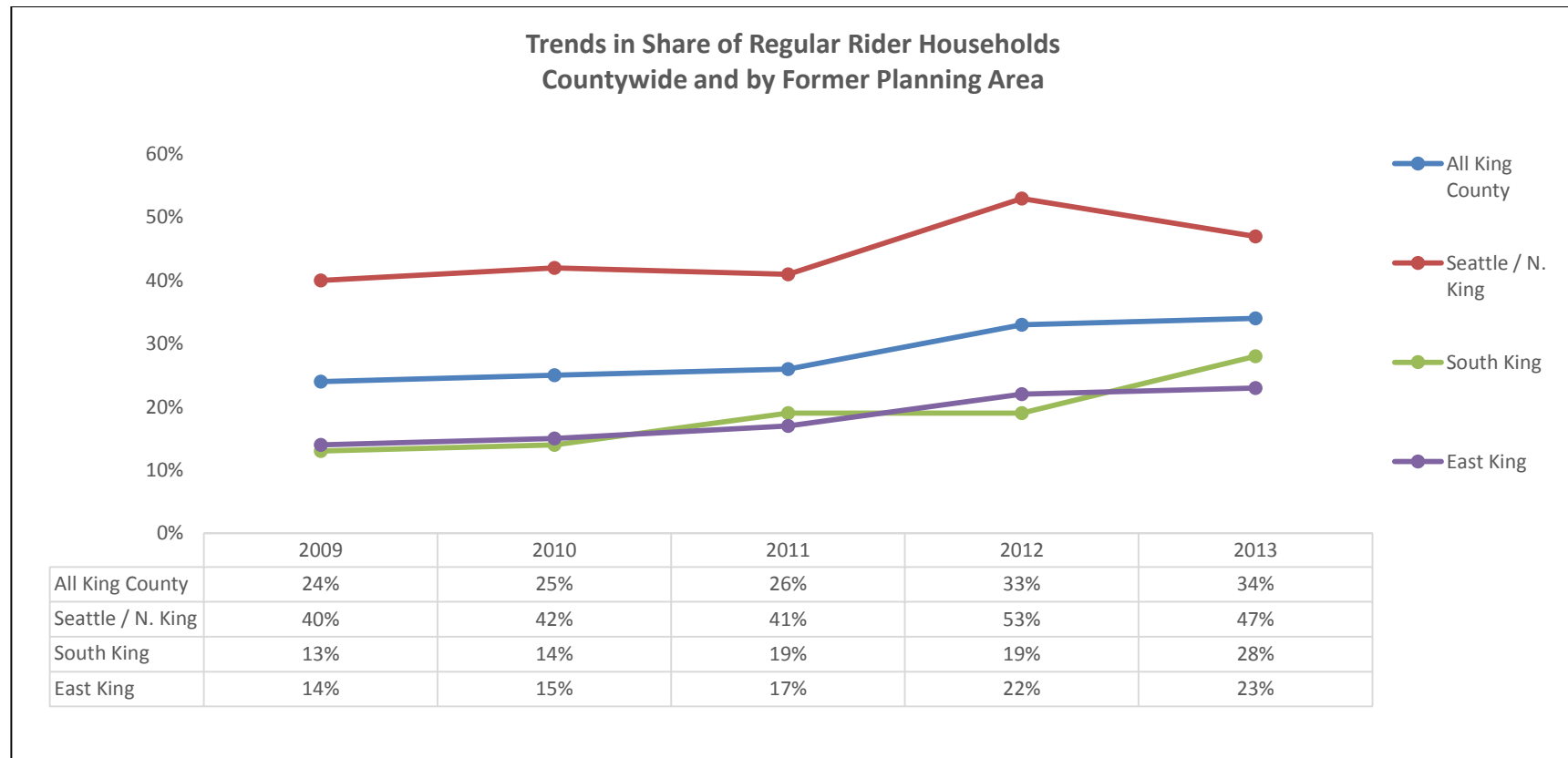
Questions: S4B—*Including yourself, how many people in your household, age 16 or over, have taken **at least five (5)** one-way rides on a Metro bus or the South Lake Union Streetcar in the last 30 days?*
Base: All contacted households, Total King County: n$_{2009}$ =10,024; n$_{2010}$ =6,510; n$_{2011}$ =12,736; n$_{2012}$ =7,285; n$_{2013}$ =8,387
          All contacted households, Seattle / N. King County: n$_{2009}$ =2,001; n$_{2010}$ =1,557; n$_{2011}$ =2,538; n$_{2012}$ =1,237; n$_{2013}$ =1,748
          All contacted households, South King County: n$_{2009}$ =4,089; n$_{2010}$ =2,442; n$_{2011}$ =5,690n$_{2012}$ =3,389; n$_{2013}$ =3,526
          All contacted households, East King County: n$_{2009}$ =3,934; n$_{2010}$ =2,151 n$_{2011}$ =4,508; n$_{2012}$ =2,659; n$_{2013}$ =3,113

King County METRO

Figure 4: Rider and Non-Rider Households, Seattle / North King County, 2009 to 2013

As noted, the percentage of Regular Rider households in Seattle / North King County increased significantly in 2012. The current share (47%) is significantly lower than in 2012, but remains significantly higher than in years prior to 2012.

At least some of the gain in Regular Riders noted in 2012 was due to a decrease in the percentage of households with Infrequent Riders. In 2013, it appears that at least some households have reverted to Infrequent Rider households.
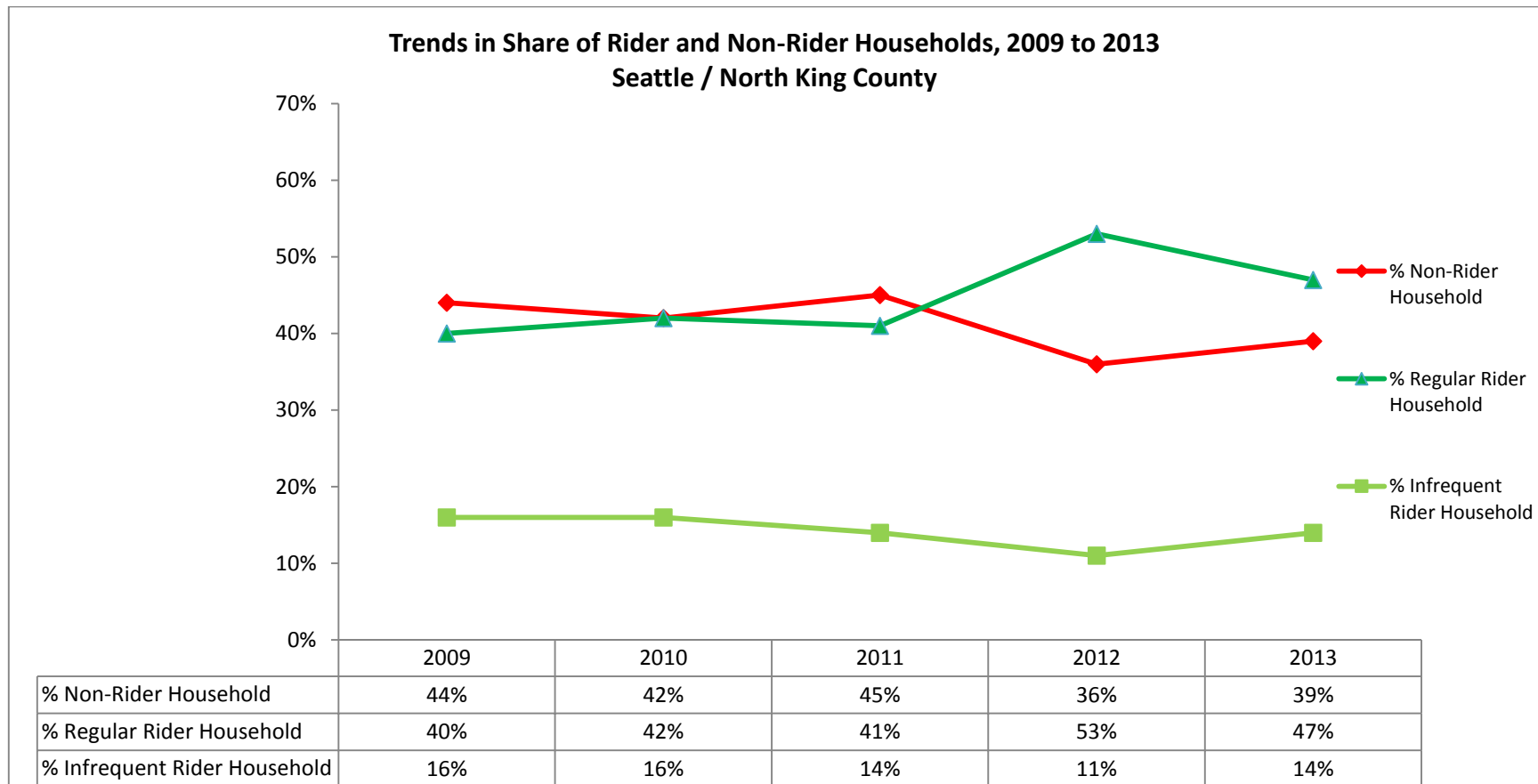
Trends in Share of Rider and Non-Rider Households, 2009 to 2013
Seattle / North King County

	2009	2010	2011	2012	2013
% Non-Rider Household	44%	42%	45%	36%	39%
% Regular Rider Household	40%	42%	41%	53%	47%
% Infrequent Rider Household	16%	16%	14%	11%	14%

Columns may sum to more or less than 100% due to rounding.

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

*S4B—Including yourself, how many people in your household, age 16 or over, have taken **at least five (5)** one-way rides on a Metro bus or the South Lake Union Streetcar in the last 30 days?*

Base: All contacted households, Seattle / N. King County: n_{2009} =2,001; n_{2010} =1,557; n_{2011} =2,538 n_{2012} =1,237 n_{2013} =1,748

Figure 5: Rider and Non-Rider Households, South King County, 2009 to 2013

After being relatively stable, the percentage of Non-Rider households in South King County dropped significantly in 2013 due to an increase in both Regular and Infrequent Rider households.
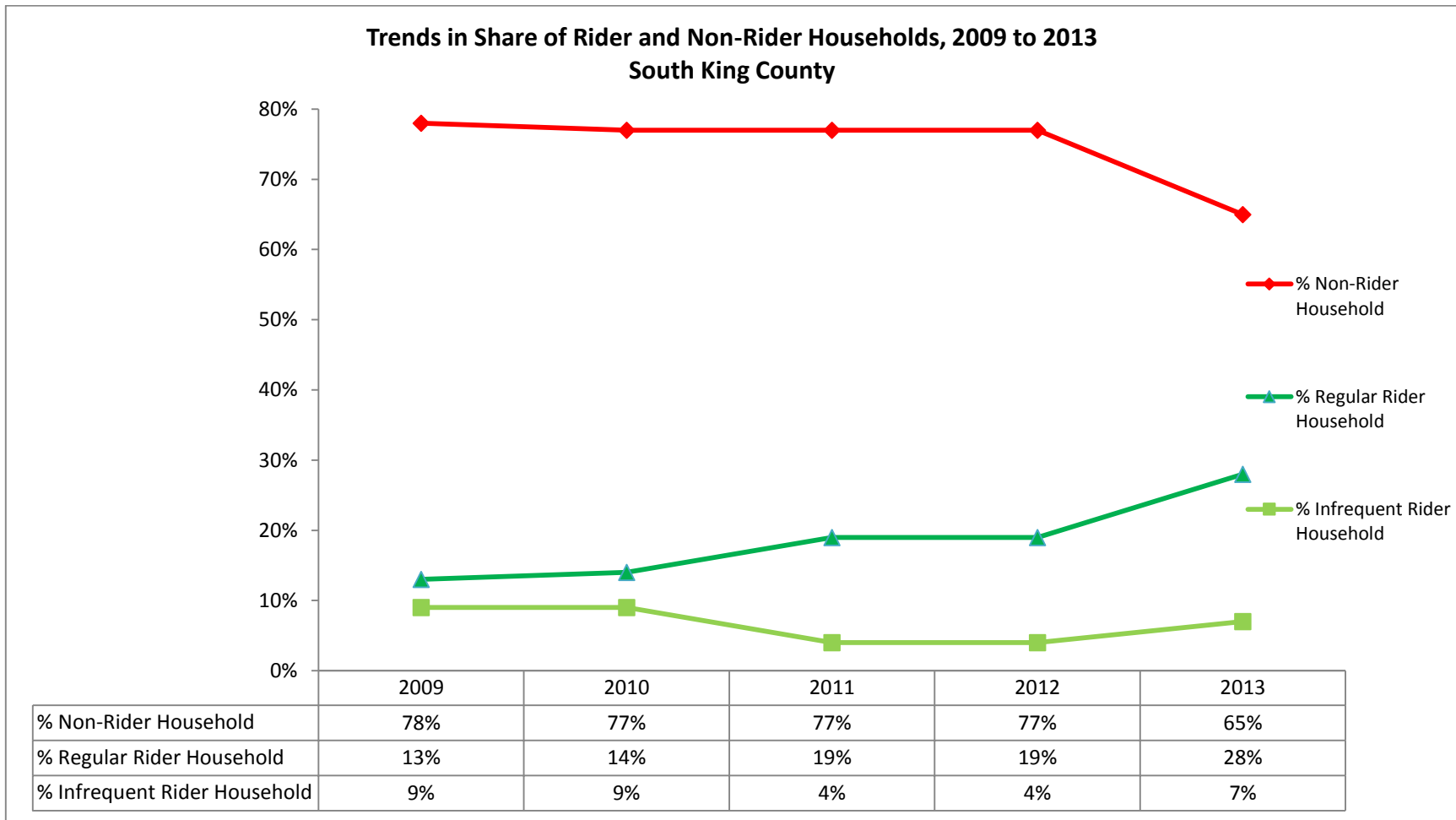
Trends in Share of Rider and Non-Rider Households, 2009 to 2013
South King County

	2009	2010	2011	2012	2013
% Non-Rider Household	78%	77%	77%	77%	65%
% Regular Rider Household	13%	14%	19%	19%	28%
% Infrequent Rider Household	9%	9%	4%	4%	7%

Columns may sum to more or less than 100% due to rounding.

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

*S4B—Including yourself, how many people in your household, age 16 or over, have taken **at least five (5)** one-way rides on a Metro bus or the South Lake Union Streetcar in the last 30 days?*

Base: All contacted households, South King County: n_{2009} =4,089; n_{2010} =2,442 n_{2011} =5,690 n_{2012} =3,389; n_{2013} =3,526

Figure 6: Rider and Non-Rider Households, East King County, 2009 to 2013

The percentage of Non-Rider households in East King County dropped significantly in 2013. This decrease is due to the increase in the percentage of Infrequent Rider households.
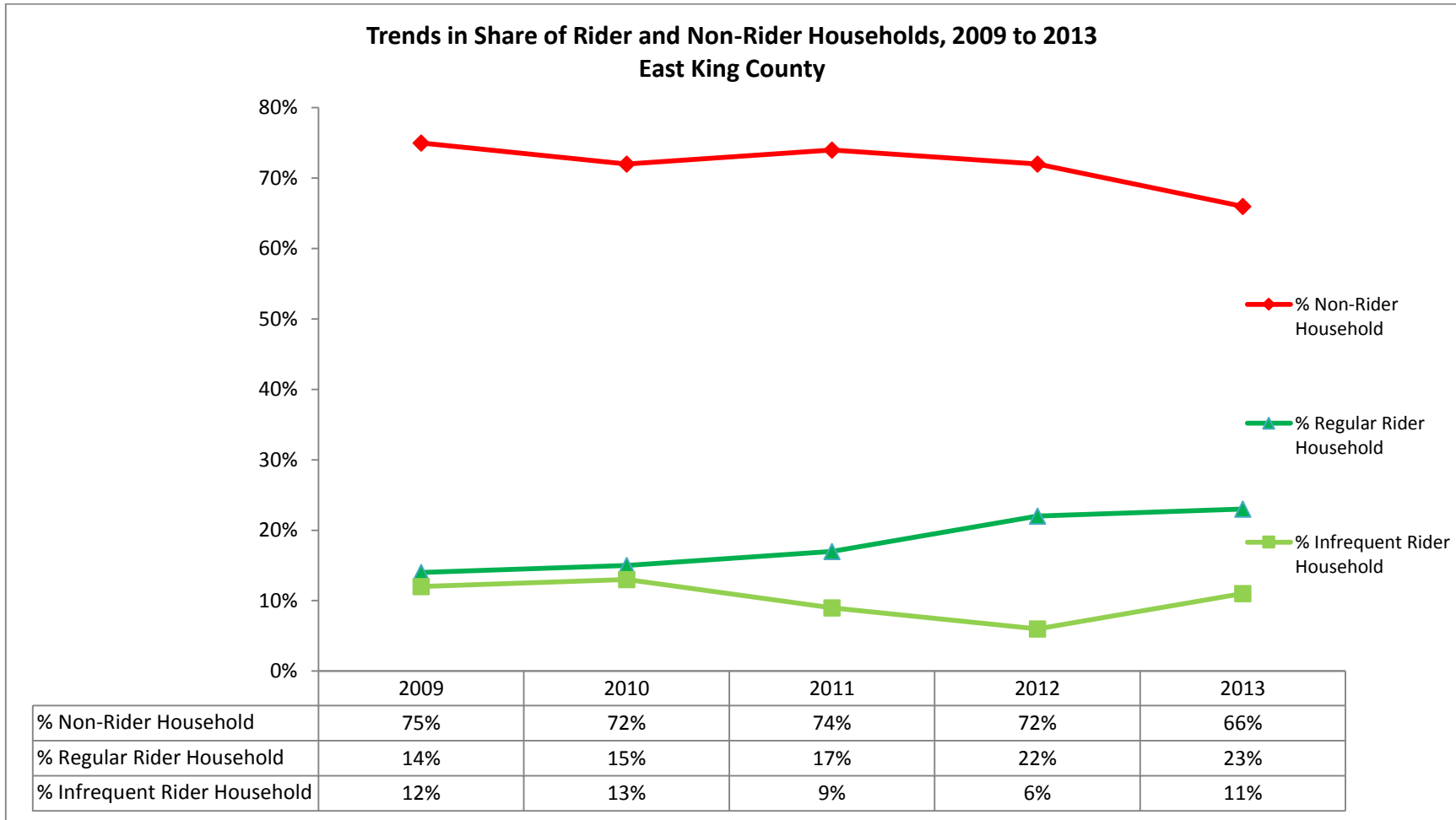
Trends in Share of Rider and Non-Rider Households, 2009 to 2013
East King County

	2009	2010	2011	2012	2013
% Non-Rider Household	75%	72%	74%	72%	66%
% Regular Rider Household	14%	15%	17%	22%	23%
% Infrequent Rider Household	12%	13%	9%	6%	11%

Columns may sum to more or less than 100% due to rounding.

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

*S4B—Including yourself, how many people in your household, age 16 or over, have taken **at least five (5)** one-way rides on a Metro bus or the South Lake Union Streetcar in the last 30 days?*

Base: All contacted households, East King County: n_{2009} =3,934; n_{2010} =2,151 n_{2011} =4,508; n_{2012} =2,659; n_{2013} =3,113

Figure 7: Share of Population (16+) Riding Metro

Respondents provided the average number of Regular and Infrequent Riders in their household. Using these numbers and the number of households in each geographic area, it is possible to provide an estimate of the total population, age 16 and older, who ride Metro for the entire county and in each of the former planning subareas.

Nearly two out of five King County residents, 16 years of age or older, ride Metro once per month or more often—24 percent ride regularly (five or more times a month) and an additional 15 percent ride occasionally (one to four times per month).

% of Population, 16+, That Ride Metro

Region	Regular Riders	Infrequent Riders	Total
All King County	24%	15%	39%
Seattle / North King	38%	19%	57%
South King	18%	12%	30%
East King	15%	14%	29%
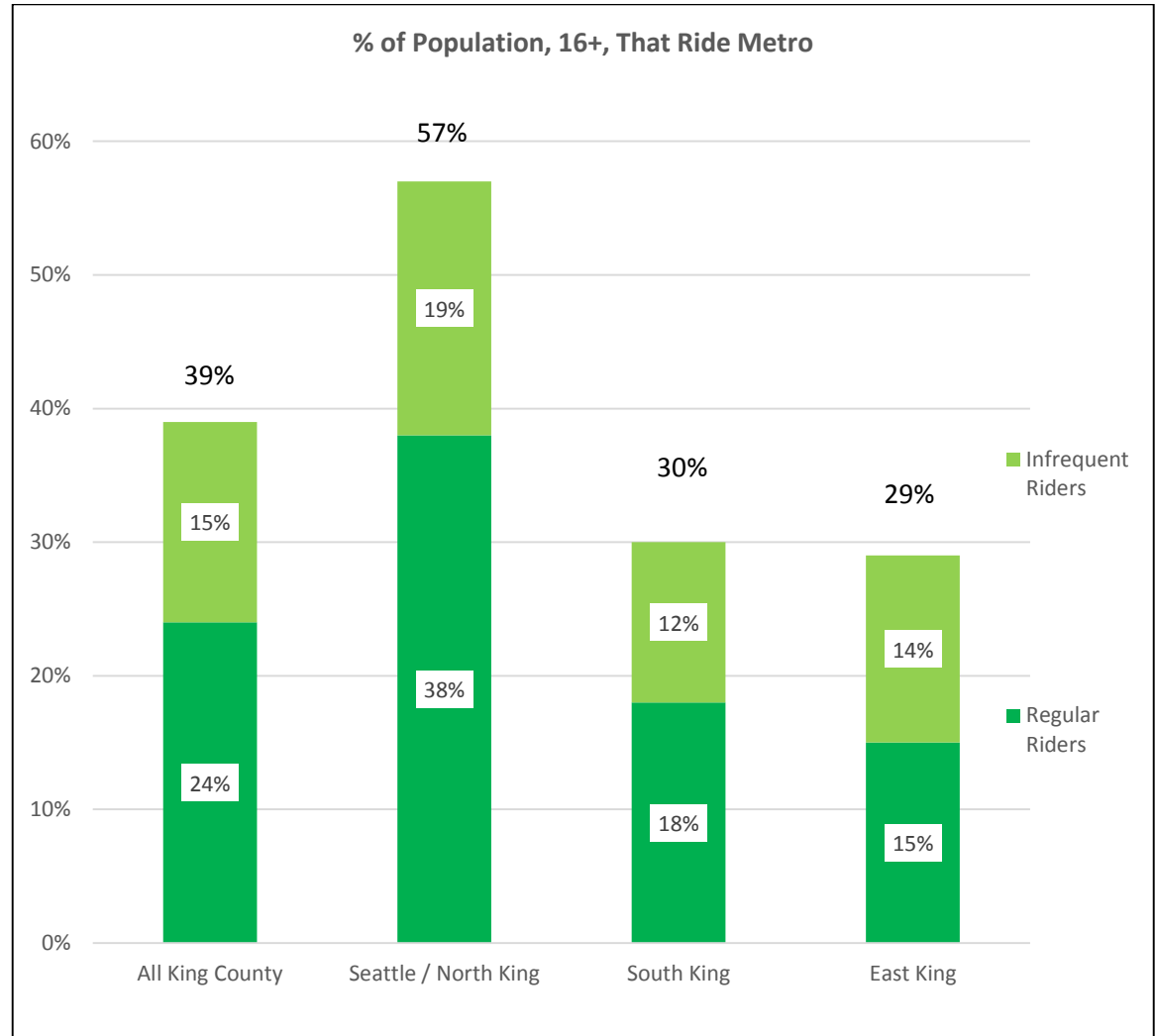
Computed based on reported number of household members and reported number of Infrequent and Regular Riders in households

Base: All contacted households, Total King County: n_{2009} =10,024; n_{2010} =6,510; n_{2011} =12,736; n_{2012} =7,285; n_{2013} =8,387

All contacted households, Seattle / N. King County: n_{2009} =2,001; n_{2010} =1,557; n_{2011} =2,538; n_{2012} =1,237; n_{2013} =1,748

All contacted households, South King County: n_{2009} =4,089; n_{2010} =2,442; n_{2011} =5,690 n_{2012} =3,389; n_{2013} =3,526

All contacted households, East King County: n_{2009} =3,934; n_{2010} =2,151 n_{2011} =4,508; n_{2012} =2,659; n_{2013} =3,113

DETAILED FINDINGS–RIDERS

DEMOGRAPHIC CHARACTERISTICS

Riders are defined as individuals who take at least one one-way trip on Metro per month; a Regular Rider takes five or more trips. Analysis in 2011 and 2012 showed that Regular Riders can be further segmented as Frequent Regular Riders (those taking 11 or more one-way trips per month) and Moderate Regular Riders (those taking between 5 and 10 one-way trips per month).

Topic	Key Findings	Key Stats		What It Means
All Riders	In general, the demographics of Metro Riders mirror those of the general population in King County. More than four out of five (86%) Metro Riders have a driver's license. Nearly nine out of ten have a vehicle in their household.		**King County Population***	**Metro Riders**	Unlike many US transit systems that are disproportionately serving customers who are less affluent and rely heavily on transit to get around, Metro is serving a significantly broader base of customers. This would suggest that Metro has been effective in designing services that fit the needs and expectations of this broader base. King County's more transit-oriented development may also be contributing to making transit more attractive. Finally, congestion, high parking costs, and social consciousness may also all contribute to encouraging transit use among those who have choices.
		Male	50%	51%	
		Female	50%	49%	
		16–34	35%	36%	
		35–54	36%	37%	
		55 plus	28%	29%	
		Mean		43.2	
		Employed	65%	67%	
		Not Employed	35%	33%	
		<$35,000	25%	25%	
		$35K–<$75K	29%	35%	
		$75K–<$100K	13%	13%	
		$100K +	34%	27%	
		Median	$71,175	$64,591	
		% with License	n.a.	86%	
		% with Vehicle in Household	91%	89%	
		* Source: 2012 American Community Survey 1-year estimates			

Topic	Key Findings	Key Stats			What It Means
Regular and Infrequent Riders	Regular Riders are younger and less affluent than Infrequent Riders. On the other hand, they are significantly more likely to be employed. Regular Riders are less likely than Infrequent Riders to have a driver's license and access to a vehicle.		**Regular Riders**	**Infrequent Riders**	Regular and Infrequent Riders are two distinct segments demographically and are likely to have very different needs and expectations for transit services. This is clearly evident in the discussion of transit use detailed in the next section.
		16–34	37%	32%	
		35–54	37%	35%	
		55 plus	26%	33%	
		Mean	41.4	46.2	
		Employed	76%	59%	
		Not Employed	24%	41%	
		<$35,000	27%	26%	
		$35K–<$75K	35%	31%	
		$75K–<$100K	13%	14%	
		$100K +	25%	29%	
		Median	$62,642	$68,400	
		% with License	82%	93%	
		% with Vehicle	86%	93%	
Regular Riders	Frequent Regular Riders are younger, more likely to be employed, and more affluent than Moderate Regular Riders. Moderate Regular Riders are more likely than Frequent Regular Riders to have a driver's license.		**Frequent Regular (11+)**	**Moderate Regular (5 – 10)**	With the exception of income, Moderate Regular Riders are more similar to Infrequent Riders than they are to Frequent Regular Riders.
		16–34	38%	35%	
		35–54	38%	37%	
		55 plus	24%	27%	
		Mean	40.8	42.9	
		Employed	77%	62%	
		Not Employed	23%	38%	
		<$35,000	26%	29%	
		$35K–<$75K	34%	36%	
		$75K–<$100K	12%	14%	
		$100K +	28%	21%	
		Median	$64,640	$60,984	
		% with License	80%	87%	
		% with Vehicle	85%	89%	
		Columns may sum to more or less than 100% due to rounding.			

King County METRO

Topic	Key Findings	Key Stats			What It Means
Low-Income Riders	Metro's low income Riders are younger than higher income Riders and are less likely to be employed. Moreover, they are less likely to have a driver's license or access to a vehicle.		< $35,000	> $35,000	Metro provides a critical service for King County's low-income residents, serving both those who are employed and others who need to get to basic services.
		16–34	48%	30%	
		35–54	24%	42%	
		55 plus	28%	28%	
		Mean	41.2	44.1	
		Employed	46%	77%	
		Not Employed	54%	23%	
		Median Income	$20,656	$84,054	
		% with License	66%	92%	
		% with Vehicle	67%	96%	

Figure 8: Rider Segments

Slightly more than two out of five Riders are Frequent Regular Riders and represent Metro's largest Rider segment.

Infrequent Riders are Metro's second largest Rider segment—37 percent of all Riders.

The relative size of these segments has remained relatively constant over the years.

Seattle / North King County has the largest percentage of Frequent Regular Riders. Nearly one out of four (24%) Metro Riders are Frequent Regular Riders living in Seattle / North King County.

Rider Segments by Area of Residence			
	Seattle / N. King (n = 508) (n$_w$=729) (A)	South King (n = 436) (n$_w$=428) (B)	East King (n = 440) (n$_w$=238) (C)
Frequent Regular Riders	45% (c)	37%	37%
Moderate Regular Riders	21%	22%	26%
Infrequent Riders	34%	41% (a)	38%
Columns may sum to more or less than 100% due to rounding.			
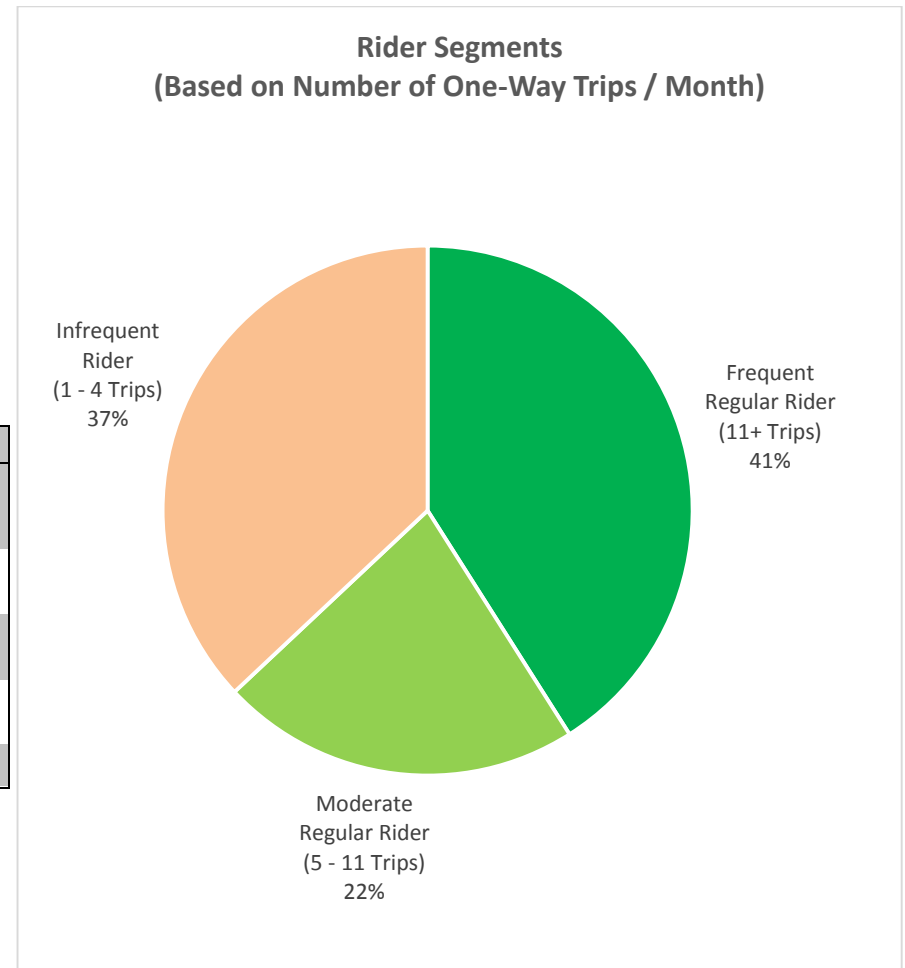
**Rider Segments
(Based on Number of One-Way Trips / Month)**

Infrequent Rider (1 - 4 Trips) 37%

Frequent Regular Rider (11+ Trips) 41%

Moderate Regular Rider (5 - 11 Trips) 22%

Questions: S5A / S6A—Thinking about the past 30 days, how many one-way rides have you personally taken on a Metro bus or streetcar?
Base: All Regular and Infrequent Riders (n = 1,384) (n$_w$=1,395)

Figure 9: Demographic Characteristics of Metro Riders

- Riders are somewhat more likely to be men (51%) than women (49%). This holds true across all rider segments.

- The gender split in the general population is 51 percent female and 49 percent male.

- Regular Riders are younger than Infrequent Riders.

    o Nearly two out of five Regular Riders are between the ages of 25 and 44.

    o One out of three Infrequent Riders are 55 and older.

- Moderate Regular Riders are older than Frequent Regular Riders but younger than Infrequent Riders.

	All Riders (n=1,395) (n$_w$=1,395)	All Regular Riders (n=1,207) (n$_w$=887) (A)	Frequent Regular Riders (11+ trips) (n=776) (n$_w$=573) (B)	Moderate Regular Riders (5–10 trips) (n=420) (n$_w$=304) (C)	Infrequent Riders (1–4 trips) (n=188) (n$_w$=508) (D)
Gender					
Male	51%	51%	51%	52%	51%
Female	49%	49%	49%	48%	49%
Age					
16–17	3%	3%	3%	4%	2%
18–24	13%	15%	14% (D)	16%	8%
25–34	20%	19%	21%	15%	22%
35–44	19%	20%	22%	17%	16%
45–54	18%	17%	16%	20% (B)	19%
55–64	16%	16%	17%	13%	15%
65 plus	13%	10%	7%	15% (B)	18% (AB)
Mean	43.2	41.4	40.8	42.9 (B)	46.2 (ABC)

Columns may sum to more or less than 100% due to rounding.

King County METRO

- Two out of three Frequent Regular Riders are employed full time, making this segment Metro's core customer segment.

  o 10 percent are students who are not working.

- Consistent with the higher percentage of older Riders, more than one out of five Infrequent Riders and 14 percent of Moderate Regular Riders are retired.

- There are few differences in household incomes across the different Rider segments, with median household incomes ranging from $60,984 for Moderate Regular Riders to $68,400 for Infrequent Riders.

  o Frequent Regular Riders are more affluent than Moderate Regular Riders due to a higher percentage with household incomes of $150,000 or greater.

	All Riders (n=1,395) (n_w=1,395)	All Regular Riders (n=1,207) (n_w=887) (A)	Frequent Regular Riders (11+ trips) (n=776) (n_w=573) (B)	Moderate Regular Riders (5–10 trips) (n=420) (n_w=304) (C)	Infrequent Riders (1–4 trips) (n=188) (n_w=508) (D)
Employment Status					
Employed FT	52%	59% (D)	67% (CD)	45%	41%
Employed PT	9%	11%	9%	12% (B)	6%
Self-Employed	6%	3%	2%	5% (b)	12% (A)
Student (not working)	10%	10%	10%	11%	8%
Homemaker	2%	2%	2%	2%	3%
Retired	13%	8%	5%	14% (B)	21% (AB)
Unemployed	5%	4%	2%	6%	6%
Disabled / Other	3%	3%	2%	4%	2%
Income					
Less than $35K	25%	27%	26%	29%	26%
$35K–<$55K	17%	17%	17%	16%	15%
$55K–<$75K	18%	18%	17%	20%	17%
$75K–<$100K	13%	13%	12%	14%	14%
$100K–<$150K	15%	14%	14%	13%	16%
$150K or more	12%	12%	14% (C)	8%	13%
Median	$64,591	$62,642	$64,640	$60,984	$68,400

Columns may sum to more or less than 100% due to rounding.

King County METRO

- The majority of Metro Riders live in a household with more than one person 16 years of age and older.

- Regular Riders' average household size is greater than that of Infrequent Riders.

- Metro's Regular Riders are somewhat more diverse than Infrequent Riders.

- The majority of Riders have a driver's license and have a vehicle available. Vehicle availability is significantly higher among Infrequent Riders than Regular Riders.

	All Riders (n=1,395) (n_w=1,395)	All Regular Riders (n=1,207) (n_w=887) (A)	Frequent Regular Riders (11+ trips) (n=776) (n_w=573) (B)	Moderate Regular Riders (5–10 trips) (n=420) (n_w=304) (C)	Infrequent Riders (1–4 trips) (n=188) (n_w=508) (D)
Household Composition					
Single-Person Household	26%	23%	21%	27%	30%
Multi-Person Household	74%	77%	79%	73%	70%
Average Household Size	2.22	2.32 (D)	2.34	2.27	2.05
Race /Ethnicity					
White	74%	71%	71%	71%	78% (a)
Black	6%	8%	7%	8%	4%
Asian	11%	12%	12%	11%	9%
Amer. Indian /Alaska Native	3%	3%	3%	2%	5%
Hispanic	5%	6%	5%	6%	4%
Mixed Race	1%	2%	1%	2%	<1%
Access to Vehicle(s)					
% w/ Driver's License	86%	82%	80%	87% (B)	93% (A)
% w/ Vehicle Available	89%	86%	85%	89%	93% (A)
# of Vehicles	1.7	1.6	1.6	1.7	1.8 (A)

Columns may sum to more or less than 100% due to rounding.

King County METRO

TRANSIT USE

This research provides a comprehensive picture of how customers use Metro. As with demographics, analysis focuses on the differences between Regular (five or more rides per month) and Infrequent Riders (1 to 4 rides per month) as well as between Frequent Regular Riders (11 or more rides per month) and Moderate Regular Riders (5 to 10 rides per month).

Topic	What We Found	Key Stats			What It Means
Frequency of Riding	After seeing a significant* increase in the average number of one-way trips between 2011 and 2012 (notably for Frequent Regular and Infrequent Riders), the overall number of trips decreased somewhat.** This decrease is significant for Moderate Regular Riders. *Significant at the 95% confidence level; denoted by ↓↑* *** Significant at the 90% confidence level; denoted by ↓↑*	**2011**	**2012**	**2013**	Growth in market share in 2013 came primarily in the former South and East King County planning area. These riders are less frequent Riders than those living in Seattle / North King County. Moreover, there was a slight decrease in the incidence of Regular Rider households in Seattle / North King County. These factors combine to explain the decrease in frequency of riding.
		# of One-Way Trips			
		All Riders			
		16.6	18.0 ▲	16.4 ▼	
		All Regular Riders			
		24.6	27.1 ▲	24.6 ▼	
		Frequent Regular Riders			
		32.8	35.7 ▲	33.7	
		Moderate Regular Riders			
		7.4	7.7	7.3 ▼	
		Infrequent Riders			
		2.2	2.4 ▲	2.3	
Reliance on Transit	More than one out of three Metro customers relies on Metro for all (7%) or most (29%) of their trips. After increasing significantly between 2010 and 2011, this percentage has been stable over the past three years. The percentage of transit-dependent riders is greatest among Frequent Regular Riders—more than three out of five rely on Metro for all (11%) or most (51%) of their trips. After decreasing between 2011 and 2012, the percentage of Moderate Regular Riders relying on Metro for some or all of their transportation needs increased, returning to 2011 levels.	**2011**	**2012**	**2013**	Metro provides critical transportation for a large base of its customers, notably those who have limited or no access to a vehicle. As more people make choices to delay getting a drivers' license or decide not to purchase a car, Metro will increasingly serve a base of Riders who are reliant on transit for many of their trips.
		% Rely on Metro All or Most Trips			
		All Riders			
		36%	34%	36%	
		Regular Riders			
		49%	47%	51%	
		Frequent Regular Riders			
		58%	57%	62%	
		Moderate Regular Riders			
		29%	23%	30% ▲	
		Infrequent Riders			
		13%	11%	10%	

Topic	What We Found	Key Stats			What It Means
Trip Purpose	The majority of Riders use Metro to commute to work or school. The percentage of Riders using Metro to commute to work is up significantly from 2010. Those using Metro to commute to work or school are Metro's most frequent Riders, averaging 22.2 one-way trips each month. Those primarily using Metro for non-commute purposes average 7.9 one-way trips per month.		**Com-mute**	**Non-Com-mute**	While it is clear that Metro serves both commuters and non-commuters, 60 percent of Metro Riders who use Metro to commute account for approximately 80 percent of all trips. The increasing use of Metro for commute trips reflects the growing economy in King County.
		2009	54%	46%	
		2010	53%	47%	
		2011	56%↑	44%	
		2012	56%	44%	
		2013	60%↑	40%	
Travel Times	Nearly three out of four Riders ride during both peak and off-peak travel times. The percentage of Riders who use Metro throughout the day has increased significantly over the years, from 60 percent in 2010 and 70 percent in 2012 to 74 percent in 2013. The percentage riding only during peak periods decreased significantly in 2013 (from 15% in 2012 to 10% in 2013).	**When Riders Ride**			A balanced schedule of trips throughout the day is needed to meet the needs of Metro Riders. As Metro needs to make tough decisions on changes to service, care must be taken when cutting off-peak service as it will affect a significant number of riders.
		Peak & Off-Peak		74%	
		Peak Only		10%	
		Off-Peak Only		16%	
Length of Time Riding	The majority of Riders have been riding for five or more years. Only one out of eight Riders have started riding in the past year.	**2011**	**2012**	**2013**	Metro is clearly successful in retaining existing Riders while at the same time attracting a steady stream of new Riders.
		Long-Term Riders (5+ Years)			
		62%	67%	65%	
		Experienced Riders (1–4 Years)			
		24%	20%	23%	
		New Riders			
		14%	13%	12%	

Topic	What We Found	Key Stats			What It Means
Distance from Home to Stop	The majority of Riders live within five blocks of a bus stop. However, nearby access varies significantly by area of residence.		**% Living within 5 Blocks of a Bus Stop**		According to research on transit-oriented development, the optimal walking distance from home to a bus stop is between a quarter- and a half-mile (or the equivalent of five blocks).
		All Riders	55%		Lack of access to service near home may represent a significant barrier to ridership in East, and, to a lesser extent, in South King County. Access to service via park-and-ride lots may overcome this barrier for some, but not all, potential Riders.
		Seattle / North King	68%		
		South King	48%		
		East King	30%		
Two-Zone Trips	More than one out of three Riders take two-zone trips. Those living in South and East King County continue to be the most likely to take two-zone trips. With the exception of East King County there has been little change in these figures over the years. The percentage of East King County Riders taking two-zone trips decreased from 69 percent in 2011 to 61 percent in 2012 and remained stable in 2013.		**% Taking Two-Zone Trips**		Higher fares and longer trips for two-zone trips, as well as a higher likelihood that a two-zone trip may require a transfer, may serve as a deterrent to ridership. Seventy-one percent (71%) of those living in South King who make two-zone trips transfer; 62 percent of those in Seattle / North King and 47 percent of those in East King County who take two-zone trips transfer.
		All Riders	37%		
		Seattle / North King	17%		
		East King	60%		
		South King	59%		

King County METRO

Figure 10: Frequency of Riding (Average Number of One-Way Trips)

Much of the increase in market share in 2012 was due to a significant increase in the number of one-way trips that Frequent Regular Riders and Infrequent Riders were taking. The overall average number of one-way trips Riders take decreased in 2013, returning for most segments to 2011 levels. The decrease in number of trips was significant (at the 90% confidence level) among Moderate Regular Riders.

- While Frequent Regular Riders are taking somewhat fewer one-way trips in 2013 than in 2012, they continue to average more trips than in 2011.
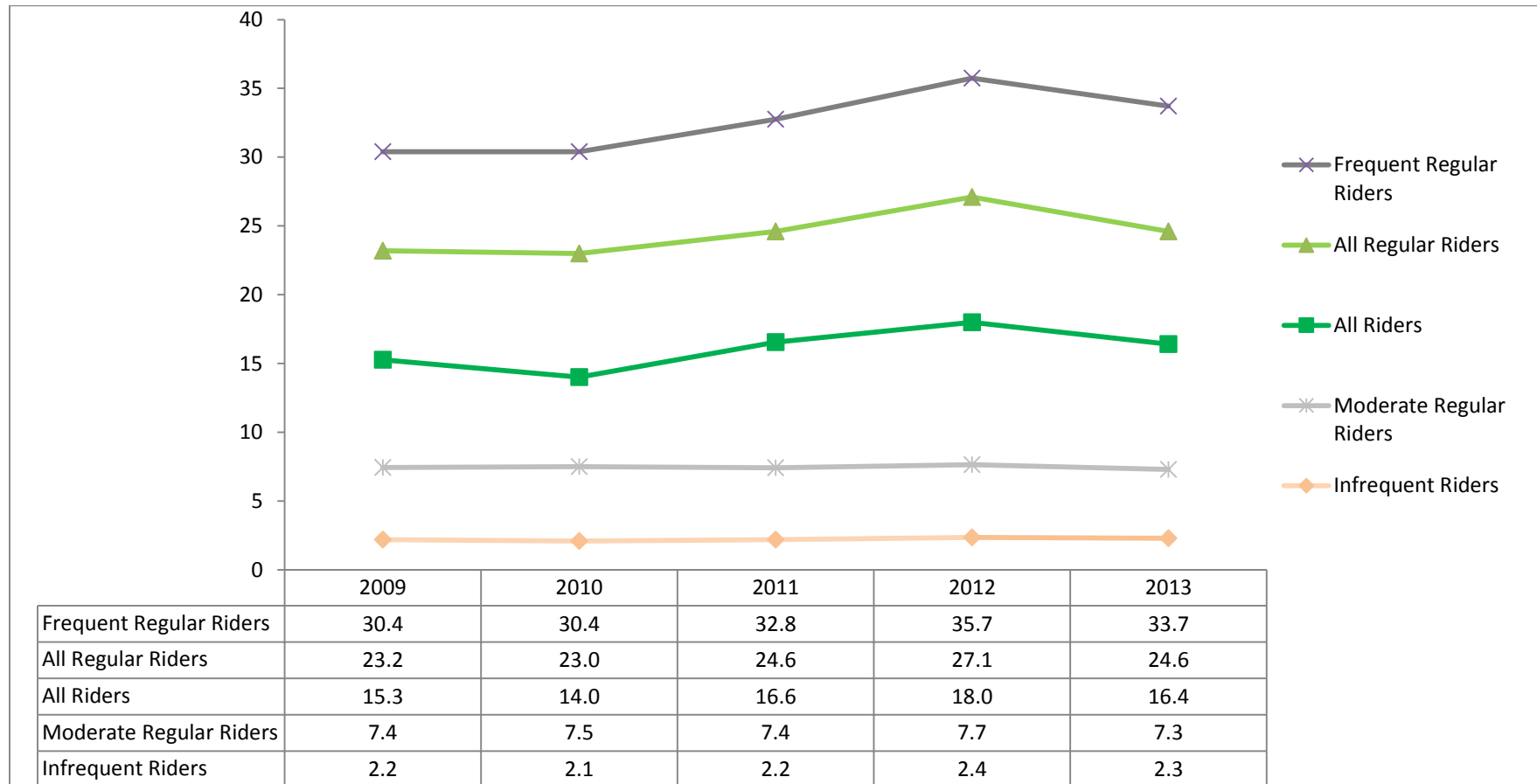
	2009	2010	2011	2012	2013
Frequent Regular Riders	30.4	30.4	32.8	35.7	33.7
All Regular Riders	23.2	23.0	24.6	27.1	24.6
All Riders	15.3	14.0	16.6	18.0	16.4
Moderate Regular Riders	7.4	7.5	7.4	7.7	7.3
Infrequent Riders	2.2	2.1	2.2	2.4	2.3

Questions: S5A / S6A—Thinking about the past 30 days, how many one-way rides have you personally taken on a Metro bus or streetcar?

Key: Frequent Regular Riders (11+ one-way trips); Moderate Regular Riders (5 to 10 one-way trips); Infrequent Riders (one to four one-way trips)

Base: All Riders; see table on page 214 for sample sizes by year.

Regular Riders residing in Seattle / North King County are the most frequent riders, followed by South and East King County.

- Thirty percent (30%) of Seattle / North King County Riders take 21 or more one-way trips monthly compared to just 23% in South and East King County.

	All Riders (n = 1,395) (nw = 1,395)	Seattle / North King (n = 509) (nw = 729) (A)	South King (n = 442) (nw = 428) (B)	East King (n = 444) (nw = 238) (C)
Average Number of One-Way Trips / Month by Rider Status and Area of Residence				
All Riders	16.4	17.9 (bc)	15.0	14.4
All Regular Riders	24.6	25.9	23.7	21.7
Frequent Regular Riders	33.7	34.3	33.7	31.7
Moderate Regular Riders	7.3	7.5	7.0	7.1
Infrequent Riders	2.3	2.3	2.3	2.3

Questions: S5A / S6A—Thinking about the past 30 days, how many one-way rides have you personally taken on a Metro bus or streetcar?

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

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level

Figure 11: Reliance on Metro for Transportation

- The percentage of Riders that report using Metro for all or most of their transportation needs increased significantly in 2011 and has remained relatively stable since then.

- More than half of all Regular Riders rely on Metro for all or most of their transportation needs.
  - Further analysis not shown here, shows that 63 percent of Regular Riders who rely on Metro for all of their transportation needs do not have a driver's license, and 58 percent do not have a vehicle available for their use.

Reliance on Metro for Transportation by Rider Status				
	All Regular Riders (n=1,207) (n$_w$=887) (A)	**Frequent Regular Riders** (n=776) (n$_w$=573) (B)	**Moderate Regular Riders** (n=420) (n$_w$=304) (C)	**Infrequent Riders** (n=188) (n$_w$=508) (D)
All / Most	51% (D)	62% (C)	30% (D)	11%
All	10% (D)	11% (C)	6%	3%
Most	41% (D)	51% (C)	24%	8%
Some	40% (D)	36%	49% (B)	23%
Very Little	9%	3%	20% (B)	66% (A)

Key: *Frequent Regular Riders (11+ one-way trips)*

Moderate Regular Riders (5 to 10 one-way trips)

Infrequent Riders (one to four one-way trips)

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level.

Trends in Reliance on Metro For Transportation
All Riders
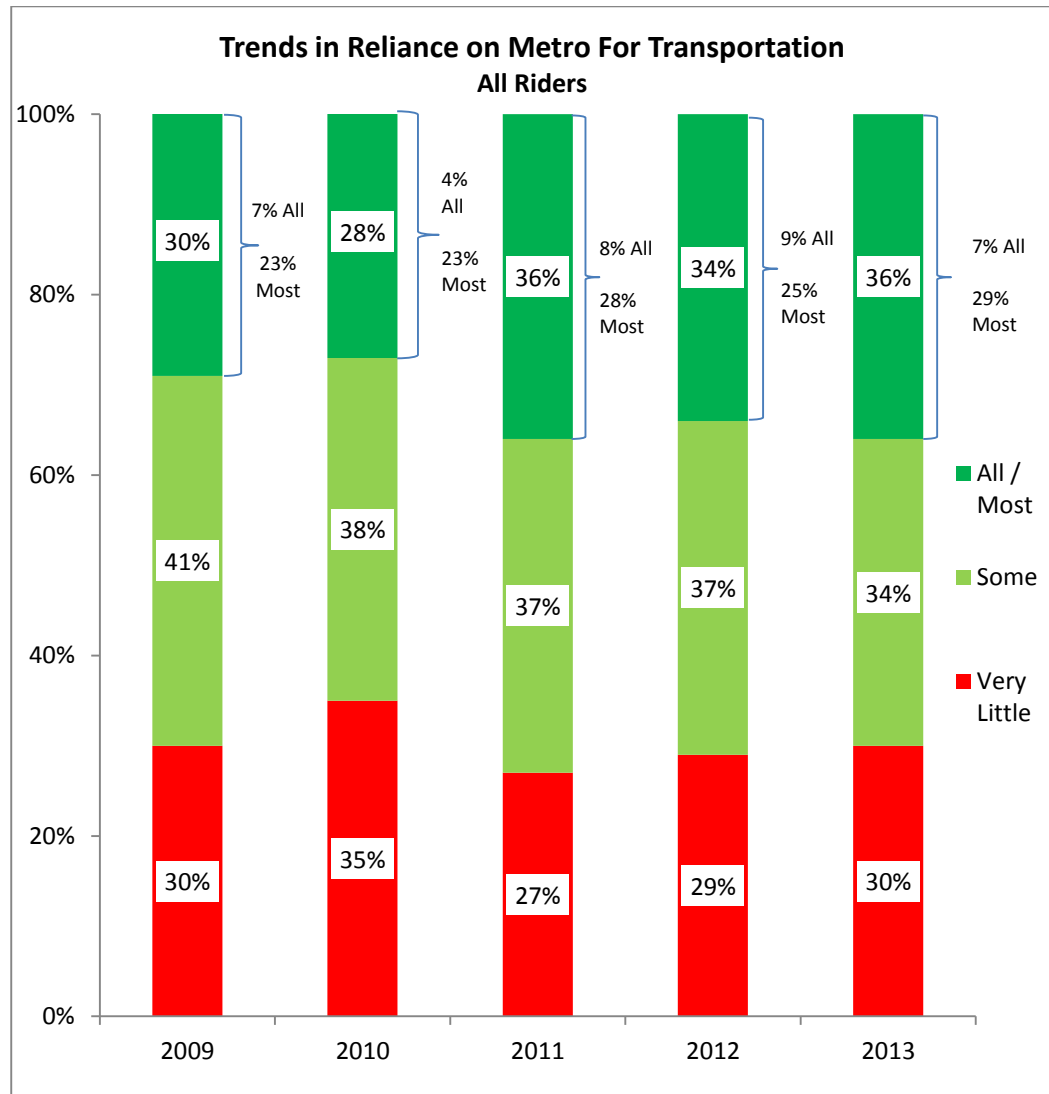
Columns may sum to more or less than 100% due to rounding.

Question M4: *To what extent do you use the bus or streetcar to get around?*

Base: *All Riders; see table on page 214 for sample sizes by year.*

Figure 12: Trip Purpose

Commute trips continue to be the primary purpose for using Metro. The percentage using Metro to commute increased in 2013, due to an increase in the percentage commuting to work. The percentage of Riders using Metro to commute to work is up significantly from 2010.

- Frequent Regular Riders continue to be the most likely to use Metro to commute. The percentage of Frequent Regular Riders using Metro to commute to work increased from 68 percent in 2012 to 76 percent in 2013.
- More than half (54%) of Moderate Regular Riders currently use Metro to commute, up from just 43 percent in 2012.
- Two out of three Infrequent Riders use the bus primarily for non-commute trips.

Primary Trip Purpose by Rider Status				
	All Regular Riders (n=1,207) (n$_w$=887) (A)	Frequent Regular Riders (n=776) (n$_w$=573) (B)	Moderate Regular Riders (n=420) (n$_w$=304) (C)	Infrequent Riders (n=188) (n$_w$=508) (D)
All Commute	75% (D)	87% (C)	54%	33%
Work	65% (D)	76% (C)	46%	28%
School	10% (D)	11%	8%	5%
Non-Commute	25%	13% (B)	47%	67% (A)

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

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level
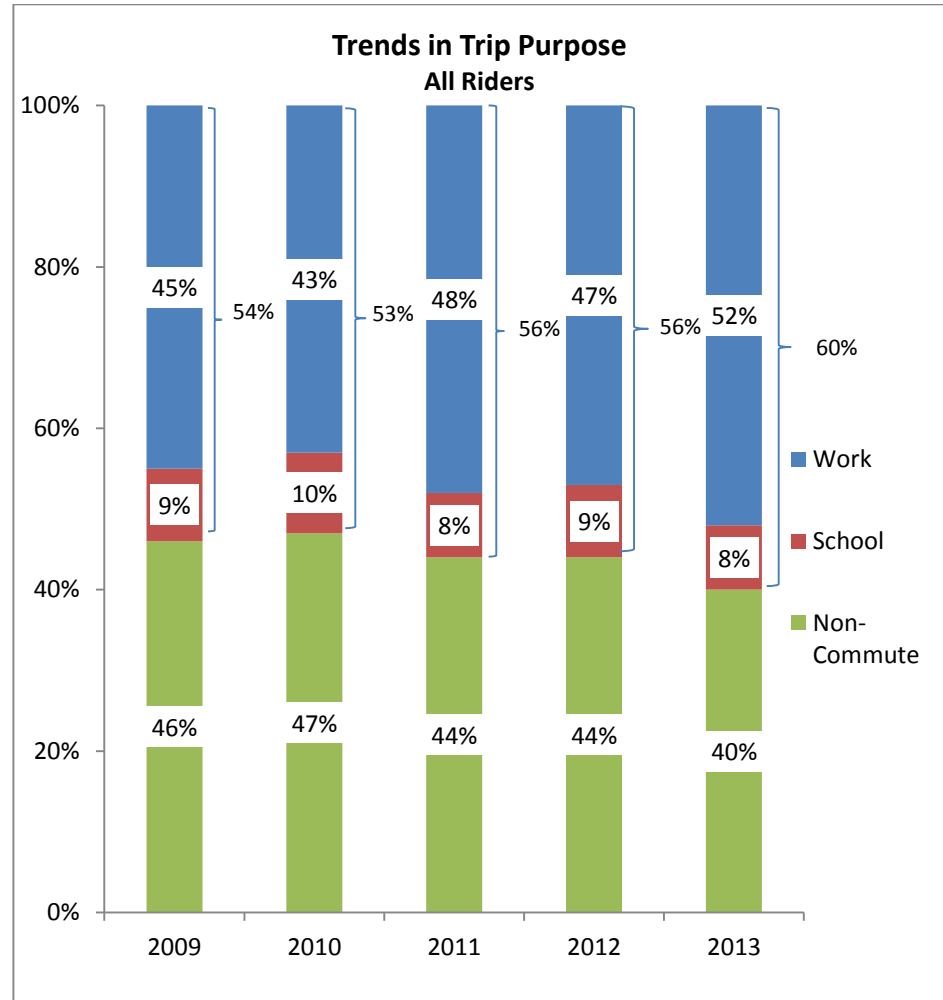
Question M5A: *When you ride the **bus or streetcar**, what is the primary purpose of the trip you take most often?*

Base: *All Riders; see table on page 214 for sample sizes by year*

Figure 13: Travel Hours

Riders are increasingly likely to use Metro throughout the day and evening as well as on weekends. The percentage riding only during peak periods decreased significantly between 2012 and 2013.

- Regular Riders, notably Frequent Regular Riders, are more likely than Infrequent Riders to ride throughout the day. While the majority of Infrequent Riders and Moderate Regular Riders also ride during peak and off-peak hours, the percentage who ride during off-peak periods only is significantly greater for these Riders than for Frequent Regular Riders.

Travel Hours by Rider Status			
	Regular Riders (n=1,207) (nw=887) (A)	Frequent Regular (n=776) (nw=573) (B)	Moderate Regular (n=420) (nw=304) (C)	Infrequent Riders (n=188) (nw=508) (D)
Peak & Off-Peak	79% (D)	82% (C)	74%	65%
Peak Only	11%	12%	8%	8%
Off-Peak Only	10%	6%	18% (B)	27% (A)
Early Morning	15% (D)	17% (C)	9%	7%
Morning Peak	69% (D)	80% (C)	48%	41%
Midday	51%	46%	57% (B)	58%
Evening Peak	82% (D)	87% (C)	73%	65%
Early Evening	50% (D)	52%	48%	36%
Weeknights	39% (D)	40%	38%	30%
Saturday	60%	58%	64%	56%
Sunday	45% (d)	43%	48%	37%

Trends in Travel Hours — All Riders
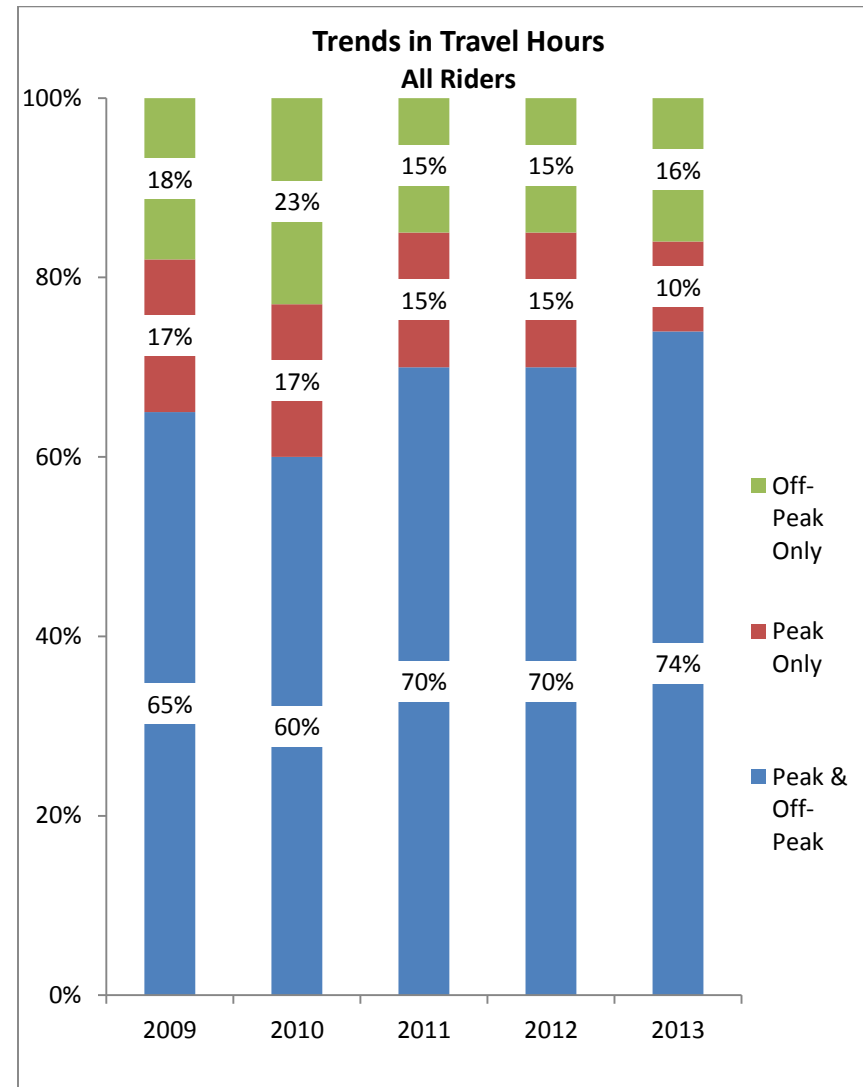
Question M6A: During which of the following time periods do you ride the bus or streetcar?

Base: All Riders; see table on page 214 for sample sizes by year.

Figure 14: Travel Hours by Primary Trip Purpose

As would be expected, the days and times of day in which Riders typically ride is related to trip purpose.

- The majority of those riding for work ride during peak and off-peak hours with hours concentrated in early morning (before 6:00 a.m.) and peak morning commute periods (6:00 and 9:00 a.m.), evening peak (3:00 and 6:00 p.m.), and early evening (6:00 to 7:00 p.m.).

- Those typically riding to commute to school ride during a combination of peak and off-peak hours. Like work commuters, they ride during the early morning and morning peak hours as well as evening peak. However, a significant number (70%) also report riding during midday.

- Those who primarily take non-commute trips are the most likely to ride during off-peak hours only, with a large percentage riding during weekday middays and significantly higher ridership on Saturdays and Sundays than for those who primarily use Metro for commute trips.

	Travel Hours by Primary Trip Purpose		
	Work Commute (n=851) (n_w=806) (A)	**School Commute** (n=139) (n_w=140) (B)	**Non-Commuters** (n=405) (n_w=449) (C)
Peak & Off-Peak	76% (C)	87% (C)	67%
Peak Only	18% (BC)	4%	2%
Off-Peak Only	6%	9%	31% (AB)
Early Morning	17% (C)	13% (C)	4%
Morning Peak	79% (C)	75% (C)	30%
Midday	36%	70% (A)	70% (A)
Evening Peak	87% (C)	80% (C)	59%
Early Evening	49% (B)	25%	43% (B)
Weeknights	33%	39%	37%
Saturday	52%	59%	67% (A)
Sunday	35%	38%	51% (A)
Base: Regular and Infrequent Riders *Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level*			

King County METRO

Figure 15: Length of Time Riding

The majority of Metro Riders continue to be experienced riders. At the same time, Metro continues to attract a consistent core of new riders each year.

Despite the significant increase in rider households in South King County, the percentage of new Riders in this area has been decreasing. This would indicate that ridership growth in this area is due to former Riders returning to the system as well as greater Rider retention.

Trends in % New Riders by Area of Residence					
	2009 (A)	**2010** (B)	**2011** (C)	**2012** (D)	**2013** (E)
Seattle / N. King	17% (CDE)	15% (cD)	11%	10%	12%
South King	27% (DE)	22% (E)	21% (E)	17%	12%
East King	20% (bCDE)	22% (e)	16%	20%	15%

Base: Regular and Infrequent Riders
Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level

Trends in Length of Time Riding
All Riders

Legend: 5 Years or More, 3 - 5 Years, 1 - 2 Years, New Riders

Year	New Riders	1-2 Years	3-5 Years	5 Years or More
2009	21%	11%	19%	49%
2010	18%	13%	19%	50%
2011	14%	7%	17%	62%
2012	13%	4%	16%	67%
2013	12%	6%	17%	65%

Question M1: *How long have you been riding Metro?*
Base: *Regular and Infrequent Riders; see table on page 214 for sample sizes by year.*

Figure 16: Distance from Home to Bus Stop

More than half of all Riders live within a half mile (5 blocks) of a bus stop, the distance other studies suggest is the maximum distance people are willing to walk to get to transit.[2] However, distance from home to a bus stop varies widely by area of residence.

- More than two out of three (68%) Seattle / North King County Riders live within five blocks of a bus stop.

- Fewer than half South King County Riders and only three out of ten East King County Riders live a comparable distance.

% of Riders Living with 5 Blocks of a Bus Stop and Average Distance to Nearest Stop by Area of Residence				
	All Riders (n=1,395) (nw=1,395)	Seattle / N. King (n=509) (nw=729) (A)	South King (n=442) (nw=428) (B)	East King (n=444) (nw=238) (C)
% within 5 Blocks	55%	68% (BC)	48% (C)	30%
Average Distance in Blocks	11.8	5.2	19.5 (A)	18.7 (A)
Base: Regular and Infrequent Riders				
Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level				

Distance from Home to Bus Stop by Area of Residence

Legend:
- More than 10 Blocks
- Less than 1 Mile (unspecified)
- 6 - 10 Blocks
- 3 - 5 Blocks
- 1 - 2 Blocks
- Less than 1 Block

Question DS1: *Approximately how far is it from your home to the nearest Metro bus stop you use most often?*
Base: *All Riders (n=1,395; nw=1,395); Seattle / N. King (n=509; nw=729); South King (n=442; nw=428); East King (n=444; nw=238)*

---

2 Dittmar, H., and G. Ohland, eds. *The New Transit Town: Best Practices in Transit-Oriented Development*. 2004. Island Press. Washington, D.C.., p. 120.

Figure 17: Two-Zone Trips

While the majority of Riders take one-zone trips, this is largely driven by the greater share of Riders who live in Seattle / North King County, the vast majority of whom take one-zone trips.

- Three out of five East and South King County Riders take two-zone trips.

- However, the percentage of East King County Riders taking two-zone trips decreased significantly between 2011 and 2012. The percentage of South King County Riders taking two-zone trips increased slightly; however this difference is not statistically significant.

Trends in % of Riders Taking Two-Zone Trips by Area of Residence				
	All Riders	**Seattle / North King**	**South King**	**East King**
2009	36%	21%	54%	67%
2010	36%	20%	57%	70%
2011	37%	21%	56%	69%
2012	34%	21%	54%	61% ↓
2013	37%	17%	59%	60%

Question GR5: Do your bus trips usually cross the Seattle city limits, that is, are they two-zone trips?

Base: Metro Bus Riders; 2009 (n=1,417; nw=1,417); 2010 (n=1,140; nw=1,140); 011 (n=1, 446; nw=1, 446) ; 2012 (n=1,062; nw=1,067) ; 2013(n=1,385; nw=1,366)
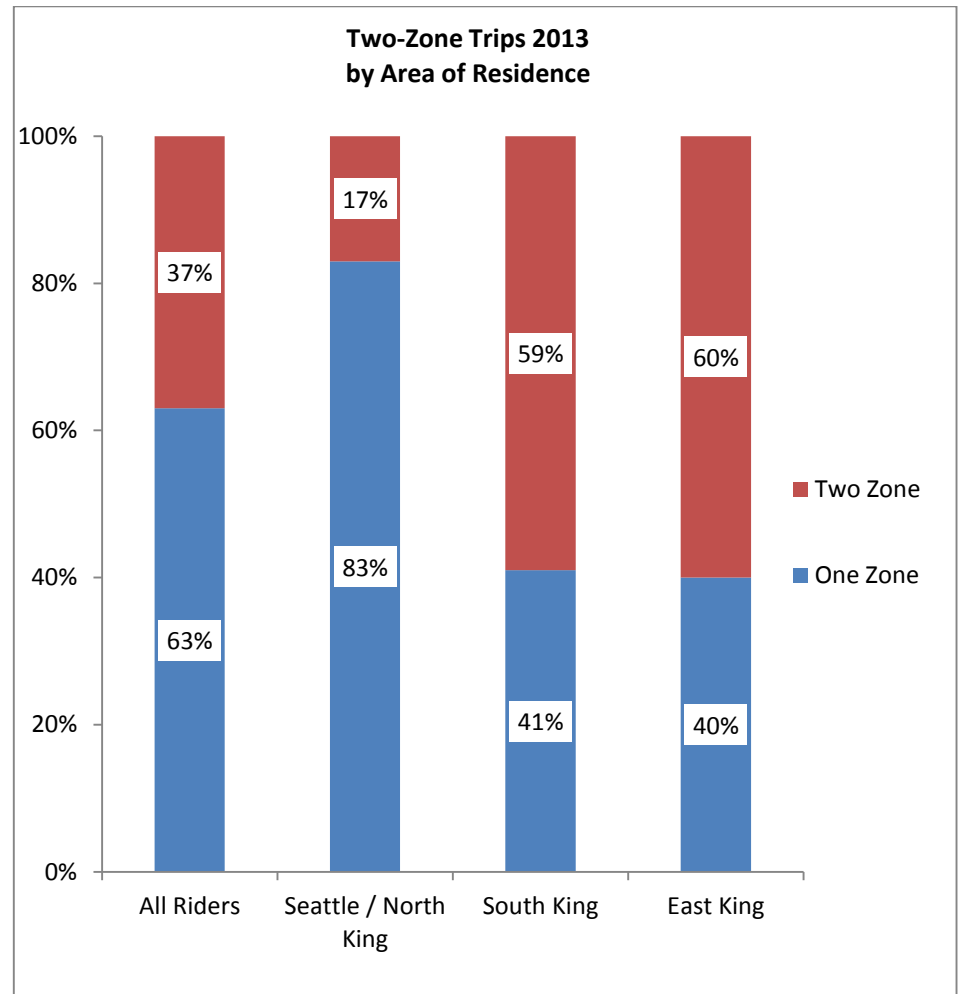
Two-Zone Trips 2013 by Area of Residence

All Riders: One Zone 63%, Two Zone 37%
Seattle / North King: One Zone 83%, Two Zone 17%
South King: One Zone 41%, Two Zone 59%
East King: One Zone 40%, Two Zone 60%

Question GR5: Do your bus trips usually cross the Seattle city limits, that is, are they two-zone trips?

Base: Metro Bus Riders (n=1,385; nw=1,366); Seattle / N. King (n=504; nw=721); South King (n=439; nw=412); East King (n=442; nw=233)

TRANSFERRING

King County has a complex, multimodal, multiagency transportation system. Questions regarding transfer rates and wait times when transferring have been asked for many years. In 2011, a new question was added to capture the extent to which Metro Riders transfer between Metro routes or other transit agencies.

Topic	What We Found	Key Stats	What It Means
Transfer Rates / Wait Time When Transferring	Half of all Riders typically take a trip that requires a transfer, and average wait time between transfers is between 14 and 15 minutes. Riders living in South King County are more likely to have to transfer; 3 out of 10 South King County Riders take trips that require two or more transfers, and they have a significantly longer wait time when transferring.	**% of Riders Who Take Trip(s) Requiring Transfers** **2010 2011 2012 2013** **All Riders** 39% 51%↑ 49% 51% **Seattle / North King** 37% 48%↑ 47% 44% **South King** 49% 67%↑ 62% 68% **East King** 36% 41% 41% 44% **Average Wait Time When Transferring** **2010 2011 2012 2013** **All Riders** 13.2 14.2↑ 13.9 14.6 **Seattle / North King** 12.6 13.0 13.0 13.2 **South King** 14.5 16.4↑ 16.5 16.4 **East King** 13.5 14.5 13.0↓ 13.7	Growth in market share in South King County is occurring despite the fact that trips are more likely to involve transfers and longer wait times.
Satisfaction with Transferring	Riders are significantly less satisfied with the wait time when transferring than the number of transfers. South King County Riders are more satisfied than are those in Seattle / North and East King County.	**% Very Satisfied** | All Riders	Sea/N King	South King	East King | **Number of Transfers** 44% 40% **50%** 36% **Wait Time** 35% 33% **41%** 24%	Despite higher transfer rates and longer wait times, South King County Riders are more satisfied with transfers than Riders in other areas.

King County METRO

Figure 18: Transfer Rates

Half of all Riders say that their primary trip requires at least one transfer. After a significant increase in 2011, the percentage of Riders who transfer has remained unchanged for the past three years.

South King County Riders continue to be more likely than those in Seattle / North and East King County to take a trip that requires a transfer.

- More than two out of three South King County Riders transfer.

  o Three out of ten (30%) Riders in South King County take trips that require two or more transfers compared to just 13 to 15 percent of those in Seattle / North and East King County.

Trends in % of Riders Transferring by Area of Residence					
	2009 (A)	2010 (B)	2011 (C)	2012 (D)	2013 (E)
All Riders	43%	39%	51% (AB)	49% (AB)	51% (AB)
Seattle / N. King	40%	37%	48% (AB)	47%	44%
South King	52%	49%	67% (AB)	62%	68%
East King	41%	36%	41%	41%	44%

Base: Regular and Infrequent Riders
Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level

**Trends in Transfer Rates
All Riders**

	2009	2010	2011	2012	2013
None	57%	61%	49%	51%	49%
One	29%	26%	36%	34%	33%
Two or More	14%	13%	15%	15%	18%
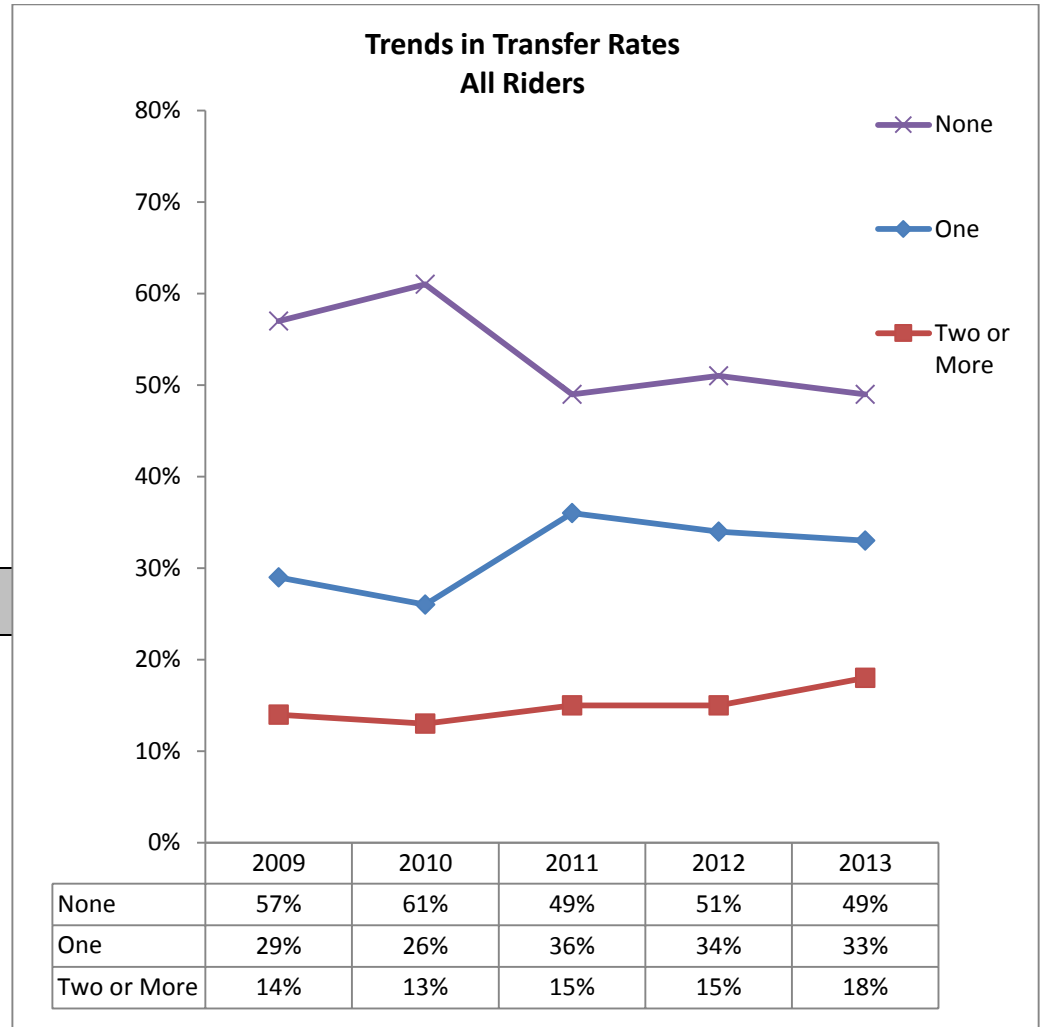
*Question M8A: How many transfers do you usually make when you use the **bus or streetcar** for your primary trip?*
Base: All Riders; see table on page 214 for sample sizes by years.

Figure 19: Wait Times When Transferring

Average wait times when transferring increased significantly in 2011 and again in 2013 and are now the longest ever.

- Nearly one out of four Riders who transfer wait more than 15 minutes.

South King County Riders who transfer continue to have significantly longer wait times than those living in East and Seattle / North King County.

While Seattle / North King County and East King County Riders are equally likely to transfer, those living in Seattle / North King County have a shorter average wait time when transferring due to the higher percentage waiting five or fewer minutes.

Wait Times When Transferring by Area of Residence			
	Seattle / N. King (n=246) (n$_w$=326) (A)	South King (n=277) (n$_w$=292) (B)	East King (n=187) (n$_w$=105) (C)
0–5 Minutes	22% (BC)	10%	7%
6–10 Minutes	34%	42%	47% (a)
11–15 Minutes	22%	21%	24%
>15 Minutes	22%	27%	22%
Mean	13.2	16.4 (AC)	13.7

Base: Riders who transfer
Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level

Trends in Wait Times When Transferring
Riders Who Transfer

	2009	2010	2011	2012	2013
> 15 Minutes	21%	18%	22%	20%	24%
11 - 15 Minutes	24%	30%	29%	26%	22%
6 - 10 Minutes	36%	37%	38%	41%	39%
0 - 5 Minutes	19%	15%	11%	13%	15%
Mean	13.2	13.2	14.2	13.9	14.6
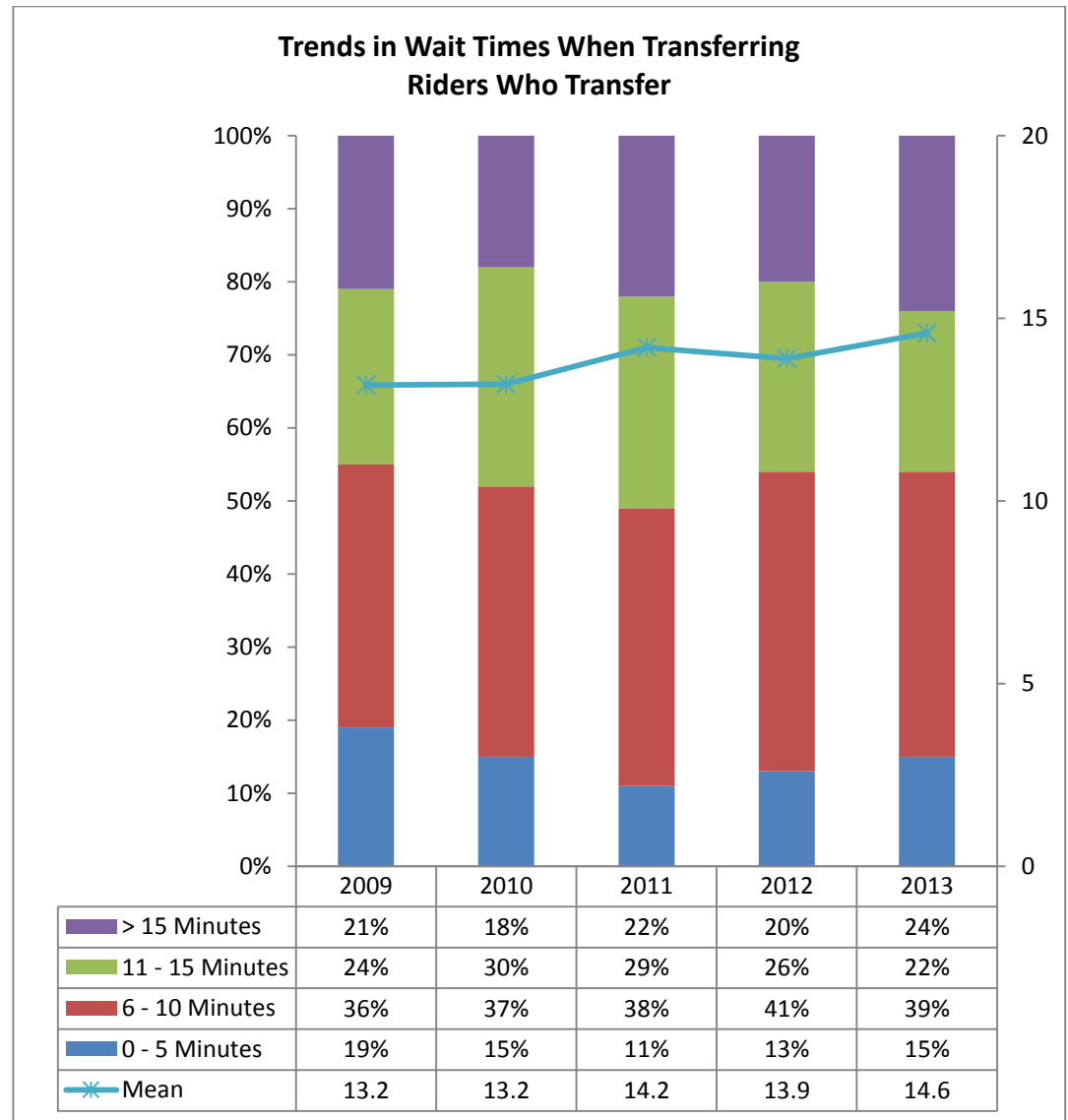
*Question M8A: How many transfers do you usually make when you use the **bus or streetcar** for your primary trip?*
Base: Riders who transfer.

Figure 20: Satisfaction with Number of Transfers and Wait Time When Transferring

The majority of Riders who transfer are generally satisfied with the number of transfers needed. They are significantly less satisfied with the wait times when transferring.

- Despite longer wait times, South King County Riders who transfer are more likely than those in East King County and, to a lesser extent, North King County to say they are very satisfied with their wait times when transferring.

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

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

Satisfaction with Number of Transfers by Number of Transfers		
	One (n=433) (nw=453) (A)	2 or More (n=260) (nw=255) (B)
Total % Satisfied	87% (B)	71%
Very Satisfied	49% (B)	36%
Somewhat Satisfied	38%	35%
Mean	4.18 (B)	3.63
Satisfaction with Wait Time When Transferring by Average Wait Times				

	0-5 (n=98) (nw=105) (A)	6-10 (n=242) (nw=279) (B)	11-15 (n=185) (nw=155) (C)	>15 (n=172) (nw=173) (D)
Total % Satisfied	91%	88%	66%	47%
Very Satisfied	63% (BCD)	46% (CD)	22%	14%
Somewhat Satisfied	28%	42%	44%	33%
Mean	4.46	4.17	3.49	2.82

Satisfaction with Number of Transfers and Wait Time When Transferring by Area of Residence				
	All Riders Who Transfer (n=710) (nw=723)	Seattle / N. King (n=246) (nw=326) (A)	South King (n=277) (nw=292) (B)	East King (n=187) (nw=105) (C)
Number of Transfers				
Total % Satisfied	81%	80%	82%	79%
Very Satisfied	44%	40%	50% (c)	36%
Somewhat Satisfied	37%	40%	32%	43%
Neutral / Dissatisfied	19%	20%	18%	21%
Mean	3.98	3.96	4.06	3.87
Wait Time When Transferring				
Total % Satisfied	73%	72%	75%	74%
Very Satisfied	35%	33%	41% (C)	24%
Somewhat Satisfied	38%	39%	34%	50% (D)
Neutral / Dissatisfied	26%	28%	25%	25%
Mean	3.74	3.69	3.81	3.71

Question M9: Are you satisfied or dissatisfied with the number of transfers you have to?

Question M11: Are you satisfied or dissatisfied with the wait time when transferring? Mean is based on 5-point scale where "5" means "very satisfied" and "1" means "very dissatisfied."

Base: Riders who make one or more transfers on typical trip

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level
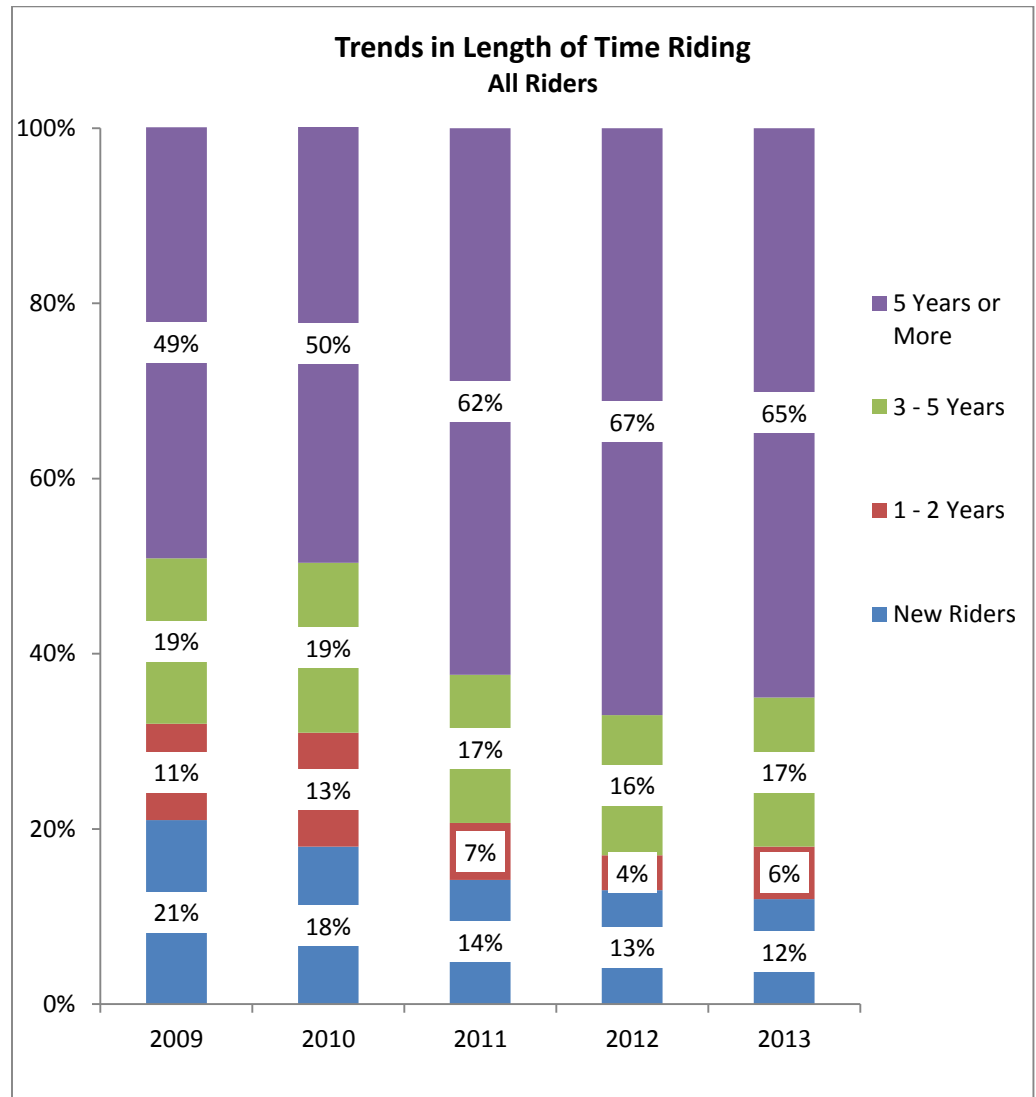
King County METRO

Figure 21: Systems Used When Transferring

While the majority (87%) of those who transfer described a single type of transfer, many described multiple types of transfers.

The majority of transfers are intrasystem transfers—that is, between a Metro bus and another Metro bus or between a Metro bus and the streetcar.

- The percentage transferring between Metro buses (81%) is nearly the same as in 2012 (84%).
- The percentage transferring between a Metro bus and the streetcar (2%) is significantly less than in 2012 (9%).

The percentage transferring between Metro and Sound Transit is less than in 2012.

	2012	2013
Metro to Link	31%	16%
Metro to ST Bus	34%	12%

Riders living in Seattle / North King County are more likely than those in South and East King County to transfer between Metro and Link.

Riders living in East King County are more likely than those in South King and, to a lesser extent, Seattle / North King County to transfer between Metro and a Sound Transit bus.

Systems Used When Transferring by Area of Residence				
	All Riders Who Transfer (n=710) (n$_w$=723)	Seattle / N. King (n=246) (n$_w$=326) (A)	South King (n=277) (n$_w$=292) (B)	East King (n=187) (n$_w$=105) (C)
Metro bus to another Metro bus	81%	81%	83% (c)	72%
Metro bus to streetcar	2%	1%	3%	4%
Metro bus or streetcar and Link	16%	22% (BC)	12%	8%
Metro bus or streetcar and ST Bus	12%	11%	8%	22% (aB)
Metro bus or streetcar and Sounder	4%	5% (c)	5%	<1%
Metro bus or streetcar and Pierce Transit	2%	1%	3%	0%
Metro bus or streetcar and Community Transit	1%	2%	<1%	<1%
Other	2%	1%	3%	2%

Question M8B: *What other systems you transfer to/from? Columns sum to more than 100%; multiple responses allowed.*
Base: *Respondents that usually make one or more transfers*

FARE PAYMENT

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

Topic	What We Found	Key Stats	What It Means
Fare Payment Method	Three out of five (60%) Riders use an ORCA Card to pay their fare. With the inclusion of U-PASS, use of ORCA is 66 percent. Growth in ORCA Card use stable. The use of cash decreased between 2010 and 2012 but increased significantly in 2013. The choice between using an ORCA Card and paying cash is related to frequency of riding—68 percent of Frequent Regular Riders use an ORCA Card compared to 59 percent of Moderate Regular Riders and 52 percent of Infrequent Riders.	**2011** **2012** **2013** **ORCA Card** 57% 60% 60% **U-PASS** 6% 9% 6% **Cash** 28% 22%↓ 28%↑ **RRFP (not on ORCA)** 3% 3% 4% *Columns sum to less than 100% other responses not included*	ORCA Card adoption has plateaued and is unlikely to increase significantly without further innovations such as an ORCA Card app allowing payment using smartphones or a low-income or Infrequent Rider card. Metro should continue to communicate the benefits of having an ORCA Card—less time waiting to board and easy transfers. The increase in cash payments is most likely due to the increase in Infrequent Riders noted this year. Should they increase the frequency with which they ride, ORCA Card adoption may increase.
ORCA Card Users	Use of the ORCA Card cuts across all Rider segments, although adoption is highest among Frequent Regular Riders. As a result, ORCA Card users mirror the characteristics of Metro customers overall, although a higher percentage are employed full time, and they are more affluent than ORCA Card non-users. Fewer than three out of five (56%) Riders with household incomes below $35,000 pay with an ORCA Card. This is down from 2012 when 62 percent of low-income Riders used an ORCA Card.	**% Using ORCA*** Frequent Regular Riders (11+ rides) 79% Moderate Regular Riders (5–10 rides) 65% Infrequent Riders (1–4 rides) 55% Low-Income Riders 56% ** Includes U-PASS*	Frequency of riding and income are the primary drivers behind ORCA Card use. For Frequent Regular Riders, the convenience of fare payment overall as well as when boarding are likely drivers. In addition, Frequent Riders are more likely to get a pass from their employers making an ORCA Card a necessity. Out-of-pocket costs as well as the cost to purchase a pass or maintain funds in an E-Purse are likely barriers among Metro's less affluent customers. Metro should continue to expand efforts to work with social service agencies to get ORCA cards to low-income, limited English speaking Riders.

Topic	What We Found	Key Stats	What It Means
Products on ORCA Card	The percentage of ORCA Card users with a pass decreased significantly due to a decrease in pass use (44% to 33%) as well as a decrease in U-PASS usage (15% to 11%). At the same time the percentage who have an E-Purse increased due primarily to the increase in the percentage only having an E-Purse—from 20 percent to 32 percent.	**Products on Card** 		2012	2013
---	---	---
Pass*	59%	44%
E-Purse	30%	35%
RRFP	12%	15%
Nothing	7%	9% | *Sums to more than 100% as respondents could have both a pass and E-Purse; * passes include U-PASS*	The decrease in employer subsidies for passes may be contributing to the decrease in overall pass use. This could cause riders to be more cognizant of the number of rides they take and the breakeven number for a pass and choose to use an E-Purse instead.
Pass / E-Purse Subsidies	The percentage of Commuter Riders who receive a subsidy for their pass or E-Purse has decreased significantly over the years.		2011	2012	2012
Subsidy			
	66%	59%↓	54%↓
No Subsidy			
	34%	41%↑	46%↑	 *Base is all Riders who are commuters. Includes both those who ride Metro to work as well as riders who use other modes to get to work.*	Concerns about costs, equality of benefits, and administrative issues may be discouraging employers from providing subsidies. Moreover, the recent increase in the amount employees are allowed to put into flexible spending accounts may be encouraging employers to move from providing subsidies and instead to encourage employees to put money into these accounts.

Topic	What We Found	Key Stats	What It Means
Satisfaction with ORCA Card	Riders using ORCA are highly satisfied with the card. They are least satisfied with the availability of locations to purchase a pass or load value on their E-Purse.	<table><tr><td></td><td>**% Very Satisfied**</td></tr><tr><td>Overall Satisfaction</td><td>83%</td></tr><tr><td>Ease of Adding Value to E-Purse</td><td>71%</td></tr><tr><td>Ease of Loading Pass</td><td>68%</td></tr><tr><td>Availability of Locations to Purchase Pass / Load E-Purse</td><td>61%</td></tr></table>	The availability of locations to purchase a pass or load value to an E-Purse may be one of the reason ORCA Card non-users choose not to obtain an ORCA Card.
Satisfaction with Value of Service for Fare Paid	Metro Riders are increasingly suggesting that they feel that they are getting high value (as measure by the percent very satisfied) relative to the fare that they pay. This is noteworthy among Riders living in Seattle / North King County—percent very satisfied increasing from 53 percent in 2012 to 66 percent in 2013. While the majority (91%) of Riders living in South King County say they are satisfied with the value of service received for the fare they pay, they are less likely than those in Seattle / North King County and, to a lesser extent, East King County to say they are very satisfied—55 percent compared to 66 percent and 63 percent, respectively.	**Satisfaction with Value of Service** <table><tr><td></td><td>**2012**</td><td>**2013**</td></tr><tr><td>Very Satisfied</td><td>56%</td><td>62%↑</td></tr><tr><td>Somewhat Satisfied</td><td>33%</td><td>29%</td></tr><tr><td>Neutral / Dissatisfied</td><td>11%</td><td>9%</td></tr></table>	Metro should capitalize on this high rating to continue to build customer goodwill. Lower ratings for value of service for the fare paid among South King County Riders may be due in part to the fact that these Riders are more likely to use cash to pay their fares. In addition, riders living in this area are more likely to take trips that require a transfer as well as having longer wait times.

King County METRO

Figure 22: Fare Payment

Two out of three (66%) Riders use an ORCA to pay their fare, broken down as follows:

- Adult ORCA Card: 49%
- RRFP on an ORCA CARD: 9%
- U-PASS powered by an ORCA Card: 6%
- Youth ORCA Card: 2%

ORCA Card use is significantly higher among Frequent and, to a lesser extent, Moderate Regular Riders than among Infrequent Riders.

Cash use decreased significantly between 2010 and 2012 but increased in 2013. Cash use remains significantly below the levels of 2010 and earlier.

- Cash use is highest among Infrequent and, to a lesser extent, Moderate Regular Riders. The increase in cash use may be due in part to the increase in the percentage of Infrequent Riders noted this year.

Fare Payment by Frequency of Riding			
	All Regular Riders (n=1,207) (nw=887) (A)	**Frequent Regular Riders** (n=776) (nw=573) (B)	**Moderate Regular Riders** (n=420) (nw=304) (C)	**Infrequent Riders** (n=188) (nw=508) (D)
ORCA	65% (D)	68% (C)	59%	52%
U-PASS	9% (D)	11% (C)	6%	3%
Cash / Tickets	21%	17%	30% (B)	39% (A)
RRFP	3%	2%	4%	5%
Other	3%	3%	3%	1%

Trends in Fare Payment All Riders

Computed Variable: Fare payment primarily based on **Question F1:** How do you usually pay your bus fare?

* Separate passes were essentially eliminated in 2011 and incorporated into ORCA Card program

Base: All Regular and Infrequent Riders; see table on page 214 for sample sizes by years.

Figure 23: Demographic Characteristics Affecting Fare Payment

In addition to being related to frequency of riding, Riders' choice for paying their fare is related to certain demographic characteristics, notably age and income.

Gender: While there are no differences overall, among RRFP users:

- Those with an RRFP on an ORCA Card are more likely to be women than men (67% compared to 33%, respectively)
- Those with an RRFP that is not on an ORCA Card are more likely to be men than women (57% compared to 43%, respectively)

Age: There are clear differences by age.

- RRFP: As expected, RRFP users are older.
- ORCA Card: Most ORCA Card users are under 55. The average age of those with a Youth ORCA is 17.8 while the average age of those with an Adult ORCA is 41.3.

Income: Income continues to influence use of ORCA Cards versus cash.

- More than one out of three (35%) Riders who continue to use cash have household incomes below $35,000.
- More than half (52%) of youth and adult Riders using an ORCA Card (excluding U-PASS and those with an RRFP on an ORCA Card) have household incomes of $75,000 or greater.

	Fare Payment Type			
	Cash / Tickets	Youth / Adult ORCA	U-PASS	RRFP*
	(n=286)	(n=728)	(n=96)	(n=245)
	(n_w=387)	(n_w=714)	(n_w=90)	(n_w=171)
	(A)	(B)	(C)	(D)
Gender				
Male	51%	54%	47%	40%
Female	49%	46%	53%	60%
Age				
16–34	42% (D)	37% (D)	47% (D)	6%
35–54	35% (D)	44% (CD)	21%	16%
55 plus	23%	19%	32%	78% (ABC)
Mean	40.2	40.5	39.6	63.5 (ABC)
Income				
<$35,000	35% (B)	16%	30%	52% (AB)
$35,000–$55,000	20%	15%	18%	13%
$55,000–$75,000	17%	17%	15%	21%
$75,000–$100,000	7%	17% (A)	13%	9%
$100,000 plus	22% (D)	35% (A)	23% (D)	5%
Median	$52,420	$79,355	$63,634	$34,634

Columns may sum to more or less than 100% due to rounding.
RRFP includes those with an RRFP on an ORCA Card and those with an RRFP.

King County METRO

Figure 24: Products on ORCA Card

Forty-four percent (44%) of all Riders using an ORCA Card have a pass on their card (includes pass, U-PASS, and pass plus E-Purse). This is down significantly from 2012 when nearly three out of five (59%) Riders had a pass on their ORCA Card.

- Regular Riders, notably Frequent Regular Riders, are more likely than Infrequent Riders to have a pass on their ORCA Card—52 and 58 percent, respectively, compared to 23 percent.
- *Note totals for pass use in text include those with a pass or a pass and an E-Purse on their ORCA Card or a U-PASS.*

More than one out of three (35%) Riders have an E-Purse, slightly higher than in 2012 (30%).

- Slightly more than two out of five (42%) Infrequent Riders have an E-Purse on their ORCA Card.

	Riders with ORCA Card*			
	Regular Riders (n=919) (n$_w$=651) (A)	**Frequent Regular Riders** (n=644) (n$_w$=451) (B)	**Moderate Regular Riders** (n=268) (n$_w$=195) (C)	**Infrequent Riders** (n=104) (n$_w$=275) (D)
U-PASS	13% (D)	15% (D)	10%	5%
RRFP	13%	11%	18%	18%
Pass	35% (D)	39% (CD)	25%	17%
E-Purse	29%	26%	37%	41% (AB)
Both	4%	4%	3%	1%
Nothing	6%	5%	7%	18% (A)

* Includes Adult and Youth ORCA, RRFP on ORCA, and U-PASS

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level

Products Loaded on ORCA Card

Legend: U-PASS, RRFP, Pass & E-Purse, E-purse, Pass, Nothing

2011: Nothing 7%, Pass 33%, E-purse 25%, Pass & E-Purse 13%, RRFP 10%, U-PASS 12%
2012: Nothing 7%, Pass 34%, E-purse 20%, Pass & E-Purse 10%, RRFP 12%, U-PASS 15%
2013: Nothing 9%, Pass 30%, E-purse 32%, Pass & E-Purse 3%, RRFP 15%, U-PASS 11%
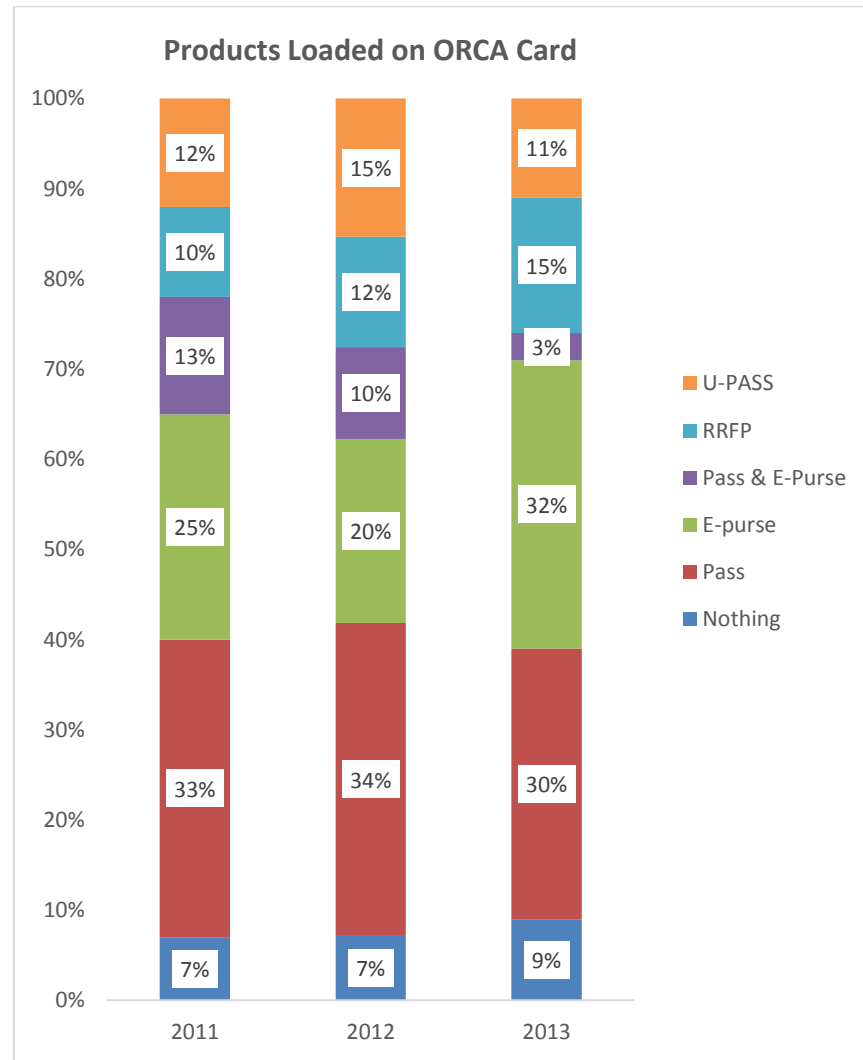
Computed variable based on fare payment and reported products

Questions F1D, F2: *Do you have a pass or an E-Purse on your ORCA Card?*

Base: Regular and Infrequent Riders using Adult and Youth ORCA, RRFP on ORCA, and U-PASS to pay fares: 2011 (n=1,001) (n$_w$ = 920); 2012 (n=832) (n$_w$ = 827); 2013 (n=1,023) (n$_w$ = 927)

King County METRO

Figure 25: Type of Pass on ORCA Card

The majority of Riders with a pass on their ORCA Card have a pass which allows them to use all of the regional transit services.

- Pass type is predominantly divided between a Passport and a Regional Transit Pass.

Type of Pass on ORCA Card
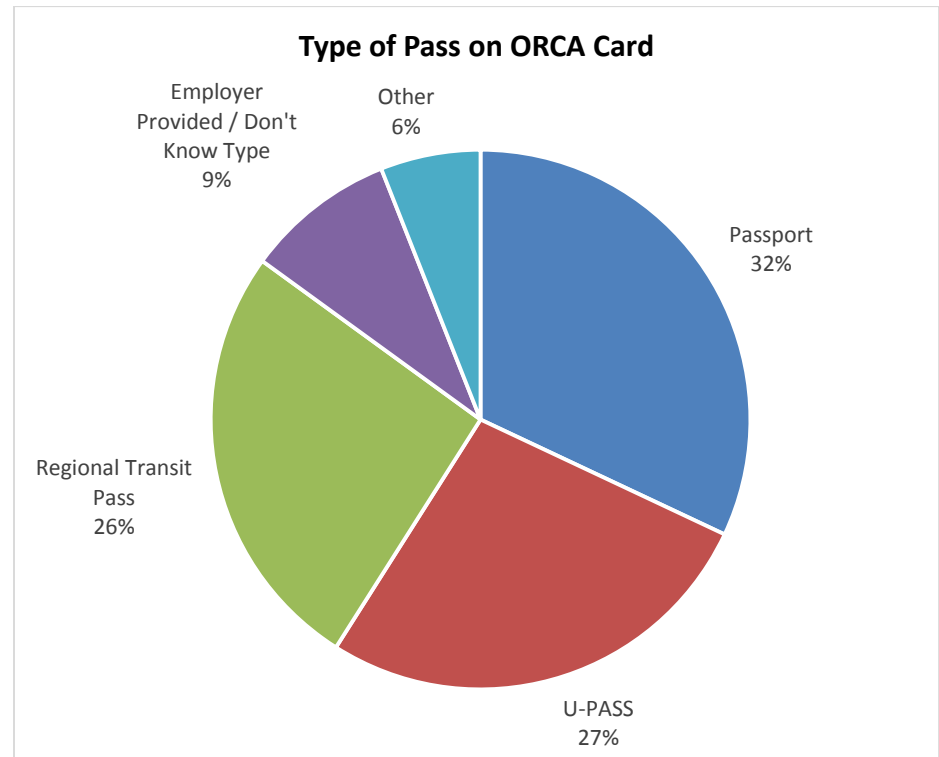
Question F2A: *What type of pass do you have loaded on your ORCA card?*

Other Includes School District Pass, Access Pass, Agency Specific Pass, and unspecified other

Base: *Riders / Infrequent Riders with pass on ORCA Card (excludes U-PASS) (n=299) (n_w = 273)*

Figure 26: Pass Subsidies

The extent to which employers and schools provide subsidies for transit passes or an E-Purse has decreased every year since 2009.

- Since 2009, the percentage of commuter Riders who receive a subsidy for their pass or E-Purse has decreased by 21 percentage points.

Commuter Riders w/ Pass or E-Purse on ORCA Card
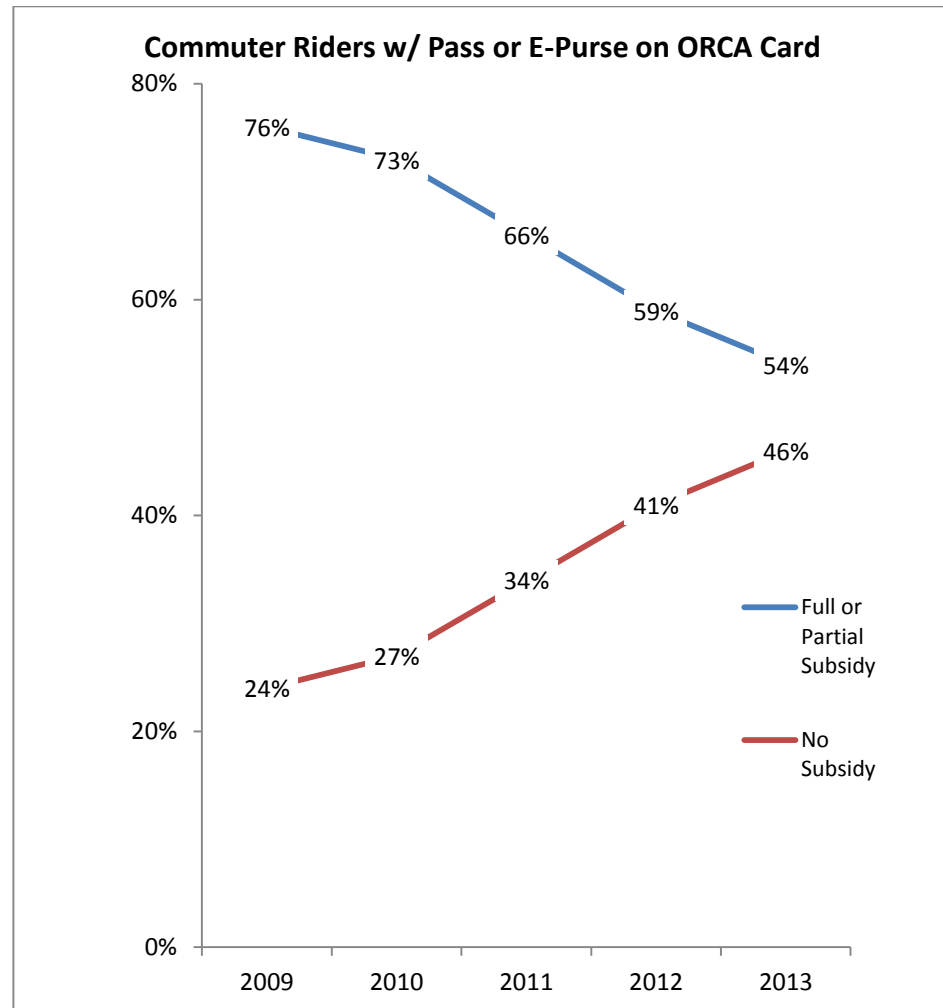
Question: Does your [school / employer} pay for some or all of your pass or E-Purse?

Base: Regular and Infrequent Riders who have an E-Purse, Pass, U-PASS, Passport / Flexpass

2009 (n = 630) (n$_w$= 596); 2010 (n = 531) (n$_w$ = 475); 2011 (n = 544) (n$_w$ = 507); 2012 (n = 573) (n$_w$ = 616); 2013 (n = 551) (n$_w$ = 569)

Figure 27: Satisfaction with Ease of Paying Fares When Boarding

Overall, Riders continue to be highly satisfied with the ease of paying fares when boarding.

- Satisfaction with ease of paying fares when boarding is the same as in 2012 when Metro first changed its policies so that everyone pays when boarding the bus.

However, Riders' satisfaction with this element of service is strongly related to how they pay their fare.

- While the majority (92%) of Riders who continue to pay with cash are satisfied with the ease of paying fares when boarding, they are significantly more likely than those using another medium to say they are just "somewhat satisfied" rather than "very satisfied."

Satisfaction with Ease of Paying Fares when Boarding by Fare Payment Method

■ Very Satisfied
■ Somewhat Satisfied
■ Neutral / Dissatisfied
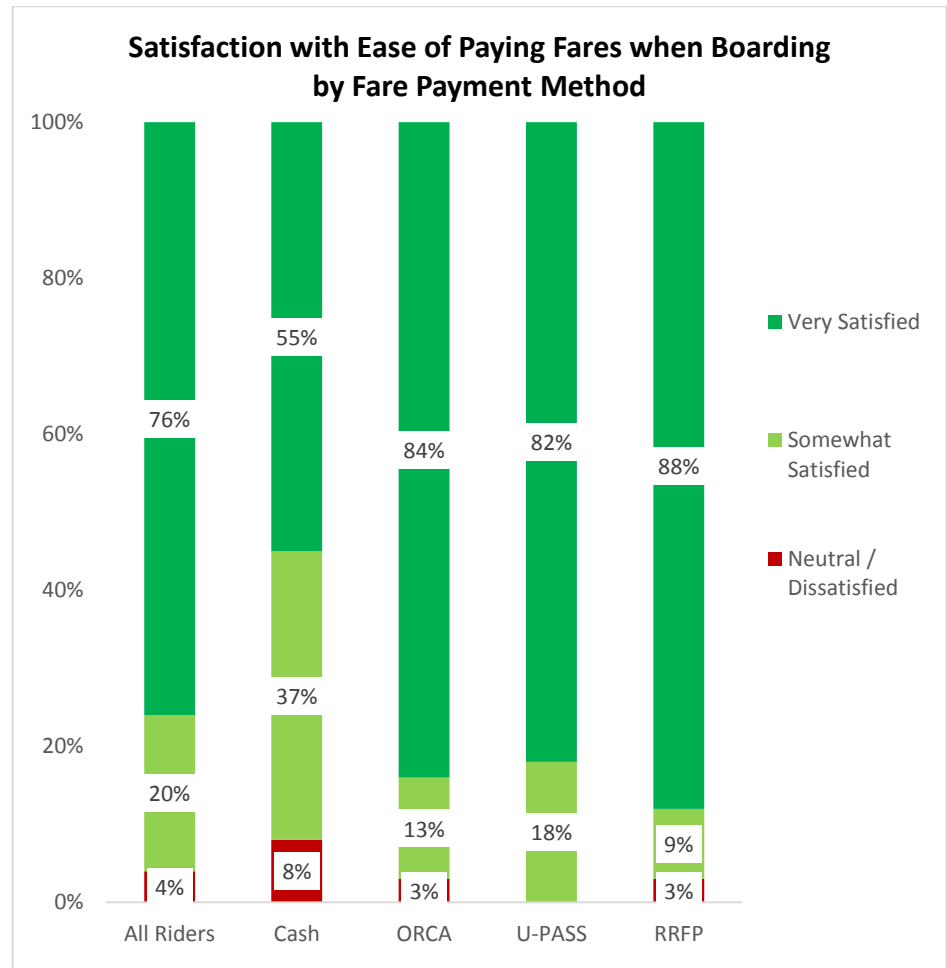
Question F5A: Are you satisfied or dissatisfied with the ease of paying fares when boarding?
Base: All Riders (n = 1,395, n_w = 1,395); Riders paying with cash / tickets (n = 286, n_w = 387); Riders paying with ORCA Card (Adult, Youth, RRFP) (n = 927, n_w = 836); Riders paying with U-Pass (n = 96, n_w = 90); Riders paying with RRFP not on an ORCA Card (n = 46, n_w = 49)

Figure 28: Satisfaction with Different Aspects of ORCA Cards

Satisfaction with the ORCA Card continues to be very high.

Riders are least satisfied with the availability of locations to purchase a pass or add value to their E-Purse.

	Overall Satisfaction with ORCA	Ease of Adding Value to E-Purse	Ease of Loading Pass on ORCA Card	Availability of Locations to Purchase Pass or Add Value
	All Users (n=927) (n_w=836)	Have E-Purse (n=417) (n_w=363)	Have Pass (n=96) (n_w=93)	Have Pass or E-Purse (n=483) (n_w=431)
Total Satisfied	97%	93%	90%	85%
Very Satisfied	83%	71%	68%	61%
Somewhat Satisfied	14%	22%	22%	24%
Neutral / Dissatisfied	3%	6%	10%	15%
Mean	4.76	4.57	4.45	4.29

Question F5: *Are you satisfied or dissatisfied with each of the following aspects of fare payment?*

Neutral is included with dissatisfied; <1-2%

Figure 29: Satisfaction with Value of Service for Fare Paid

Nine out of 10 Riders are satisfied with the value of service they receive for the fare they pay.

- This is the same as in 2012 when 89 percent of all Riders said they were satisfied. However, a greater percentage of Riders in 2013 said they were very satisfied (62% compared with 56%, respectively) rather than somewhat satisfied (29% compared with 33%, respectively).

Riders' satisfaction with this element of service is strongly related to how they pay their fare.

In addition, it is somewhat related to where they live. The somewhat lower ratings among South King County Riders is most likely due to the fact that a greater percent of these Riders use cash to pay their fare.

Satisfaction with Value of Service for Fare Paid by Area of Residence			
	Seattle / N. King (n=509) (nw=729) (A)	South King (n=442) (nw=428) (B)	East King (n=444) (nw=238) (C)
Total Satisfied	90%	91%	91%
Very Satisfied	66% (B)	55%	63%
Somewhat Satisfied	24%	36% (A)	28%
Neutral / Dissatisfied	9%	9%	9%
Mean	4.46	4.34	4.44

Columns may sum to more or less than 100% due to rounding.
Mean is based on five-point scale where "5" means "very satisfied" and "1" means "very dissatisfied.

Satisfaction with Value of Service for Fare Paid by Fare Payment Type
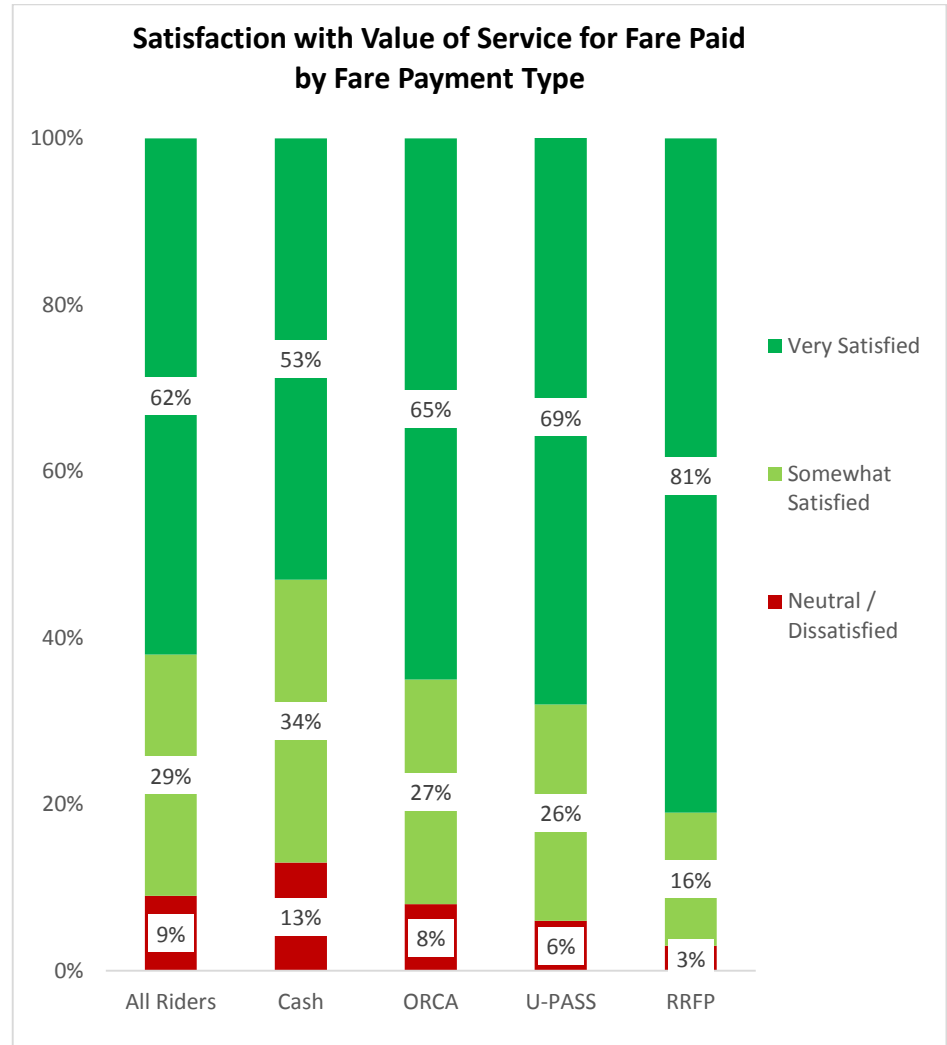
Question F5G: Are you satisfied or dissatisfied with the value of service for the fare paid?
Base: All Riders (n = 1,395, nw = 1,395); Riders paying with cash / tickets (n = 286, nw = 387); Riders paying with ORCA (Adult, Youth, RRFP) Card (n = 927, nw = 836); Riders paying with U-Pass (n = 96, nw = 90); Riders paying with RRFP not on ORCA Card (n = 46, nw = 49)

METRO INFORMATION SOURCES

Opportunities to communicate with customers have increased significantly over the past several years with the creation of customer databases of those willing to be reached via text messages as well as the introduction of websites and mobile Apps. As a result, questions have focused on identifying customer awareness of, use of, and satisfaction with the vast array of communication channels. In 2013, questions were added to assess how best to communicate with customers about proposed or upcoming service changes.

Topic	What We Found	Key Stats	What It Means
Metro Information Sources	Metro customers continue to use traditional information sources—information at bus stops and printed timetables—as well as online sources to get information on riding. The percentage of Riders with a smartphone has increased significantly—from 60 percent in 2012 to 77 percent in 2013. Moreover, the percentage of Riders using a smartphone to get information about Metro has also increased—from 50 to 63 percent. Among those Riders who have a smartphone 86 percent use it to get information about Metro; 53 percent use it frequently.	<table><tr><td></td><td>% of all Riders Using</td></tr><tr><td>Metro Online*</td><td>85%</td></tr><tr><td>Posted Information</td><td>84%</td></tr><tr><td>Regional Trip Planner</td><td>72%</td></tr><tr><td>Printed Timetables</td><td>69%</td></tr><tr><td>Smartphone**</td><td>63%</td></tr><tr><td>Metro Alerts</td><td>23%</td></tr><tr><td>Social Media</td><td>16%</td></tr></table> *Metro online includes Metro's general website the Regional Trip Planner **To allow for comparability across sources, base for Smartphone use is all riders including those with and without a Smartphone	Metro customers look for information from a variety of sources, and it is important for Metro to use different media to reach all Riders with current information.

Topic	What We Found	Key Stats	What It Means
Satisfaction with Sources Used	Metro customers are generally satisfied with the information available. Ninety-five percent (95%) of all riders say they are satisfied overall with their ability to get information about Metro's routes and schedules; 60 percent are very satisfied. Riders are most satisfied with Metro Online. However, they are less satisfied with posting of service delays or problems online. Riders are generally satisfied with the ability to get printed timetables; they are less satisfied with their accuracy.	<table><tr><td></td><td>**% Very Satisfied**</td></tr><tr><td>Metro Online</td><td>60%</td></tr><tr><td>Ability to Get printed timetables</td><td>52%</td></tr><tr><td>Accuracy of printed timetables</td><td>44%</td></tr><tr><td>Metro alerts</td><td>49%</td></tr><tr><td>Website postings of service delays / problems</td><td>35%</td></tr></table>	As more Riders use mobile apps to get information about Metro, up-to-date and real-time postings of service delays and problems are likely to become increasingly important.
Information about Service Changes	The majority (74%) of Riders get information about Metro service changes on board the buses or at the bus stops. The second major source of information is online at Metro's website. Riders' preferences for how to get information are less clear-cut.	<table><tr><td></td><td>**Currently Get**</td><td>**Prefer to Get**</td></tr><tr><td>On Buses /at Stops</td><td>74%</td><td>41%</td></tr><tr><td>Online</td><td>37%</td><td>28%</td></tr><tr><td>Media</td><td>28%</td><td>18%</td></tr><tr><td>Email</td><td>11%</td><td>23%</td></tr></table>	Metro needs to continue to use traditional sources for getting the word out about service changes. However, traditional sources are not necessarily the preferred sources. Email may prove to be an effective source of information as well as a push to a phone via a text or App similar to alerts on their phone.
Satisfaction with Information Regarding Service Changes	Riders are generally satisfied with how well Metro provides information about service changes. Riders express greater concerns with the effectiveness of the communication regarding reasons for the change compared with its timeliness.	<table><tr><td colspan="2">**Satisfaction with Notifications about Service Changes**</td></tr><tr><td>Very Satisfied</td><td>41%</td></tr><tr><td>Somewhat Satisfied</td><td>43%</td></tr><tr><td>Dissatisfied</td><td>15%</td></tr><tr><td colspan="2">**% of Riders Less than Very Satisfied with Notifications about Service Change who are Dissatisfied with**</td></tr><tr><td>Timeliness of Notification</td><td>18%</td></tr><tr><td>Communicating Reasons for Change</td><td>32%</td></tr></table>	Metro should continue to be open and transparent with information about proposed or upcoming service changes.

King County METRO

Figure 30: Use of Information Sources

Metro's website and the online Regional Trip Planner are widely used and are the most frequently used source for information.

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

Smartphones are increasingly becoming a key source of information about Metro.

- More than three out of four (77%) Metro Riders have a smartphone, up from 60 percent in 2012.
- More than three out of five Metro Riders (63%) use a smartphone to get information about Metro, up from 50 percent in 2012.
  - Among those Riders who have a smartphone, nearly all (86%) use it to get information about Metro; 53 percent use it frequently.

More than one out of five (23%) Riders use Metro alerts.

- Of those, the majority (68%) use only one service; however, 32 percent use both text message and email alerts.

One out of six Riders (16%) use social media to get information about Metro.

- As with alerts, the majority use a single source; however, 17 percent use two and 13 percent use all three.

Sources of Information about Metro		
	% Use	**% Use Frequently**
Metro's Online*	85%	44%
Posted information	84%	36%
Printed timetables	69%	27%
Smartphone	63%	38%
Customer Service Call Center	26%	3%
Metro Alerts (total)	23%	9%
Email	17%	6%
Text	12%	4%
Social Media (total)	16%	3%
Tweets from Metro	9%	2%
Metro Matters Blog	8%	1%
Metro's Facebook	7%	<1%

Question IN1: *How often do you use each of the following to get information regarding Metro? Would you say frequently, sometimes, rarely, or never?*

* *Metro online includes Metro's general website the Regional Trip Planner*

Base: *All Riders (n = 1,395; n$_w$ = 1,395)*

Figure 31: Satisfaction with Information Sources Regarding Metro

Riders' satisfaction with their overall ability to get information about Metro's routes and schedules has remained high and stable over the past three years.

Riders are most satisfied with the availability of service information on Metro's website.

- Satisfaction with the availability of information via Metro online decreased sharply in 2011 but improved in 2012. Current year ratings have remained stable.

Riders are slightly more satisfied with their ability to get printed timetables than the accuracy or reliability of the timetables.

- Riders' satisfaction with their ability to get current printed timetables dropped sharply in 2010 and has fluctuated after that.

Riders continue to be least satisfied with the website postings of service delays or other problems.

Satisfaction with Information Sources Regarding Metro		
	Total % Satisfied	% Very Satisfied
Overall ability to get information about Metro's routes and schedules *	95%	60%
Availability of service information on Metro Online **	95%	60%
Ability to get current printed timetables ***	89%	52%
Alerts via email or text regarding service delays or other problems ****	86%	49%
Accuracy or reliability of printed timetables***	87%	44%
Website posting of service delays or other problems**	83%	35%

Question IN3: *Are you satisfied or dissatisfied with each of the following. Sources of information about Metro?*
Base: *All Riders (n = 1,395; n$_w$ = 1,395)*
** *Riders using Metro online (n = 1,049; n$_w$ = 1,072)*
***Riders using timetables (n = 1,058; n$_w$ = 959)*
**** *Riders using alerts (n = 371; n$_w$ = 314)*

Trends in Satisfaction with Primary Metro Information Sources					
	2009	2010	2011	2012	2013
			% Very Satisfied		
Overall ability to get information about Metro's routes and schedules	64%	62%	59%⬇	59%	60%
Availability of service information on Metro Online	63%	62%	52%⬇	62%⬆	60%
Ability to get current printed timetables	67%	55%⬇	54%	49%⬇	52%
Alerts via email or text regarding service delays or other problems			44%	43%	49%
Accuracy or reliability of printed timetables				46%	44%
Website posting of service delays or other problems				39%	35%
Base: *Regular and Infrequent Riders; varies by use of different information sources* ⬆ *= Significant (95%) increase from previous years;* ⬆ *= Significant (90%) increase from previous years* ⬇ *= Significant (95%) decrease from previous years;* ⬇ *= Significant (90%) decrease from previous years*					

Figure 32: Sources for Information about Metro Service Changes

The majority of Riders, notably Regular Riders, get information about Metro service changes from notices posted on the bus or at the bus stops. Metro's website is also an important source of information for both Regular and Infrequent Riders.

While notices at the bus stop or on the bus and Metro's website are also the preferred sources of information about services changes, twice as many Riders would prefer to get notices via email than currently get information this way. This may be an area for Metro to message as these riders may not be aware that email notices are available.

Current Sources of Information			
	All Riders (n=705) (nw=720)	Regular Riders (n=614) (nw=460) (A)	Infrequent Riders (n=91) (nw=260) (B)
Notices on the bus	54%	61% (B)	40%
Notices at bus stop	52%	59% (B)	41%
Metro Online	37%	37%	37%
TV News	19%	18%	22%
Newspaper	16%	13%	20%
Radio	11%	11%	13%
Email	11%	13%	6%
Social media	7%	9%	4%
Community or public meetings	4%	5%	2%
Seattle Transit Blog	3%	3%	3%
Word-of-Mouth	2%	2%	3%

Question IN5B: How do you currently hear about service changes to Metro?

Multiple responses allowed; columns sum to more than 100%

Base: *Random selection of all Riders*

Preferred Sources of Information			
	All Riders (n=705) (nw=720)	Regular Riders (n=614) (nw=460) (A)	Infrequent Riders (n=91) (nw=260) (B)
Notices at bus stop	31%	34% (B)	26%
Notices on the bus	30%	37% (B)	17%
Metro Online	28%	25%	34%
Email	23%	25%	20%
Newspaper	12%	8%	21% (A)
TV News	11%	9%	14%
Radio	8%	7%	10%
Push to phone via text or app	6%	9% (B)	2%
Social media	6%	6%	4%
Community or public meetings	3%	2%	3%
Seattle Transit Blog	1%	1%	3%
Word-of-Mouth	1%	<1%	1%

Question IN5C: How would you prefer to get information regarding service changes to Metro?

Multiple responses allowed; columns sum to more than 100%. **Base:** *Random selection of all Riders*

Figure 33: Contacting Metro about Services Changes

Nearly all Metro Riders (93%) indicate an interest in providing input on upcoming service changes. Most Riders prefer providing input via Metro's website or email.

Preferred Ways to Provide Input

Category	% Prefer
Metro Online	39%
Email	38%
Phone	14%
Town Hall Meeting	7%
Social Media	8%
Survey	3%
Don't Wish to Provide Input	7%
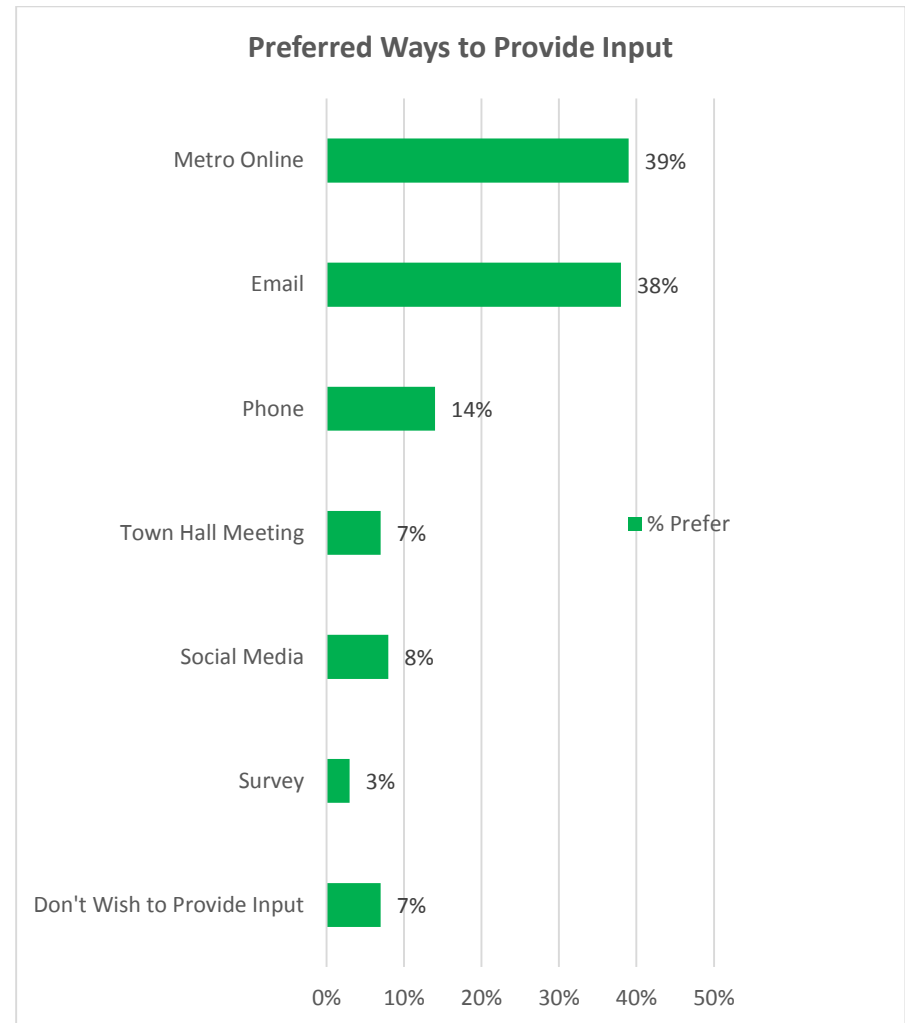
Question IN5F: How would you prefer to provide input to Metro regarding future service changes?
Multiple responses allowed; columns sum to more than 100%.
Base: *Random selection of all Riders (n = 673) (n$_w$ = 720)*

Figure 34: Satisfaction with Information Regarding Services Changes

Riders are generally satisfied with how well Metro provides notifications of service changes.

- Riders in South King County are the most satisfied with notifications about service changes.

Satisfaction with Notification of Service Changes by Area of Residence % Satisfied			
All Riders (n=705) (nw=720)	**Seattle / N. King** (n=258) (nw=371) (A)	**South King** (n=219) (nw=225) (B)	**East King** (n=228) (nw=124) (C)
84%	82%	90% (c)	80%

Among those less than "very satisfied" with overall notification of service changes, Riders are significantly less satisfied with how well Metro communicates the reasons for these changes than with the timeliness of notifications.

- Regular Riders, notably Frequent Regular Riders, are less satisfied with communications from Metro regarding reasons for service changes.
- There are no differences by area of residence.

Communications regarding Reasons for Service Changes by Frequency of Riding % Satisfied				
All Riders (n=384) (nw=403)	**Regular Riders** (n=343) (nw=264) (A)	**Frequent Reg. Riders** (n=219 (nw=175) (B)	**Moderate Reg. Riders** (n=122) (nw=88) (C)	**Infrequent Riders** (n=41) (nw=139) (D)
69%	66%	65%	68%	74%

Satisfaction with Information Regarding Service Changes All Riders

Question IN5A: Are you satisfied or dissatisfied with. . .?
Columns may sum to more or less than 100% due to rounding.
Base: *Random selection of all riders (n = 705; nw = 460)*
*Base: *Riders less than "very satisfied" with overall notification of service changes (n = 384; nw = 257)*

King County METRO

Figure 35: Awareness and Use of QR Codes on Rider Alerts to Get Information about Metro

Just over two out of five (42%) Metro Riders who frequently or sometimes use their smartphones to get information about Metro are aware of the QR codes posted on Rider Alerts on the bus that they can use to connect to Metro Online for more detailed information.

- Of those aware of the QR codes, less than one out of five (18%) have used the QR code to link to Metro's website to get information.

% of Riders with Smartphones

Aware, Have Used
7%

Aware, Have not Used
35%

Not Aware
58%
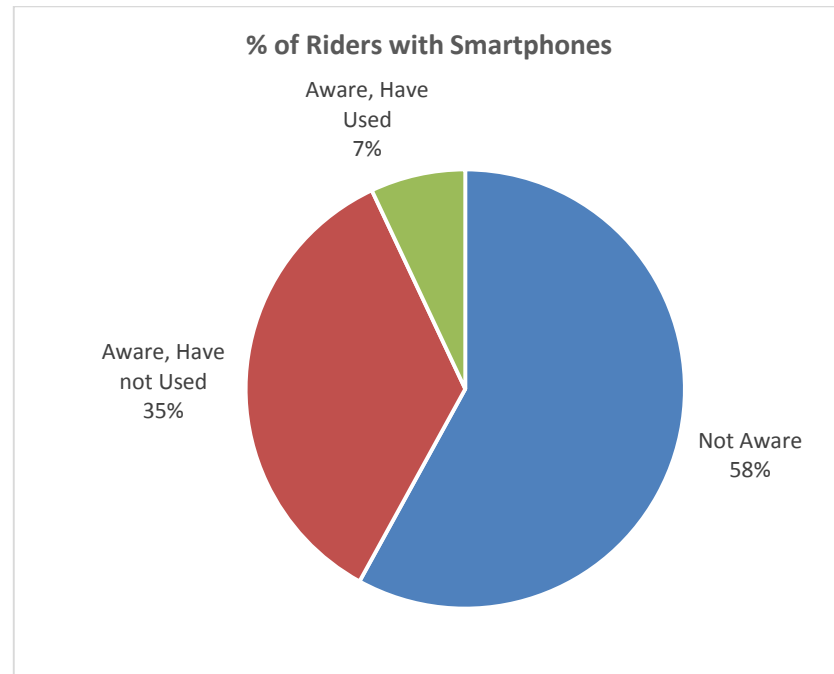
Question IN4F_2: Are you aware of the digital image called a QR code posted on Rider Alerts on the bus that you can use to connect to Metro Online for more detailed information?
Base: Regular and Infrequent Riders who frequently or sometimes use their smartphone to obtain information about Metro (n = 622); (n_w = 735)

RIDERS' USE OF PARK-AND-RIDE LOTS

Riders and Non-Riders were asked questions regarding their use of park-and-ride lots. This section looks at **Riders'** use of park-and-ride lots.

Topic	What We Found	Key Stats	What It Means
Use of Park-and-Ride Lots	Currently over one out of three (35%) Riders has used a park-and-ride lot in the past year, similar to 2012 when 33 percent used a park-and-ride lot. Use of park-and-ride lots continues to be highest among Riders living in East King County. However, park-and-ride lot use in this area has decreased each year from 75 percent in 2009 to 66 percent in 2013.	**% Used P&R in Past Year** All Riders — 35% Seattle / North King — 20% East King — 66% South King — 43%	Park-and-ride lots continue to be an important part of Metro's system notably for Riders living in East King County.
Accessing Park-and-Ride Lot	The majority (74%) of those using park-and-ride lots drive alone and park. The percentage driving alone is highest among those living in East King County.	**% Drive Alone** All Riders — 74% Seattle / North King — 67% East King — 79% South King — 73%	High use by single-occupant drivers continues to drive demand for parking spaces. Encouraging more carpooling or drop-offs could reduce demand.
Distance from Home to Park-and-Ride Lot	The majority of Riders using park-and-ride lots live within three miles of the lot they use most often. Park-and-ride lot users living in East King County have the closest proximity to the lot they use. Nearly three out of five (57%) live within two miles of the lot they use.	**Average Distance (in miles) from Home to Lot** All Users — 3.98 Seattle / North King — 4.15 East King — 3.09 South King — 4.77	Proximity to a park-and-ride lot that then provides direct service may be a major reason behind the high use of park-and-ride lots among those living in East King County.

Figure 36: Riders' Use of Park-and-Ride Lots within Past Year

The percentage of Riders who use park-and-ride lots decreased significantly in 2012 and remained relatively unchanged in 2013. Currently slightly more than one out of three (35%) Riders used a park-and-ride lot in the past year.

- Use of park-and-ride lots continues to be highest among those living in East King County. However, the percentage of Riders living in East King County who use park-and-ride lots has decreased by 11 percentage points since 2010. Currently, two out of three (66%) Riders living in East King County have used a park-and-ride lot in the past year down from 77 percent in 2010.
- Forty-three percent (43%) of those living in South King County have used a park-and-ride lot in the past year, down from 49 percent in 2012 and significantly lower than in 2009.
- About one out of five Riders living in Seattle / North King County have used a park-and-ride lot. This has varied little over the years.

% of Riders Using Park-and-Ride Lot in Past Year

	2009	2010	2011	2012	2013
All Riders	39%	36%	37%	33%	35%
Seattle / N. King	22%	10%	22%	18%	20%
South King	58%	52%	52%	49%	43%
East King	75%	77%	72%	69%	66%
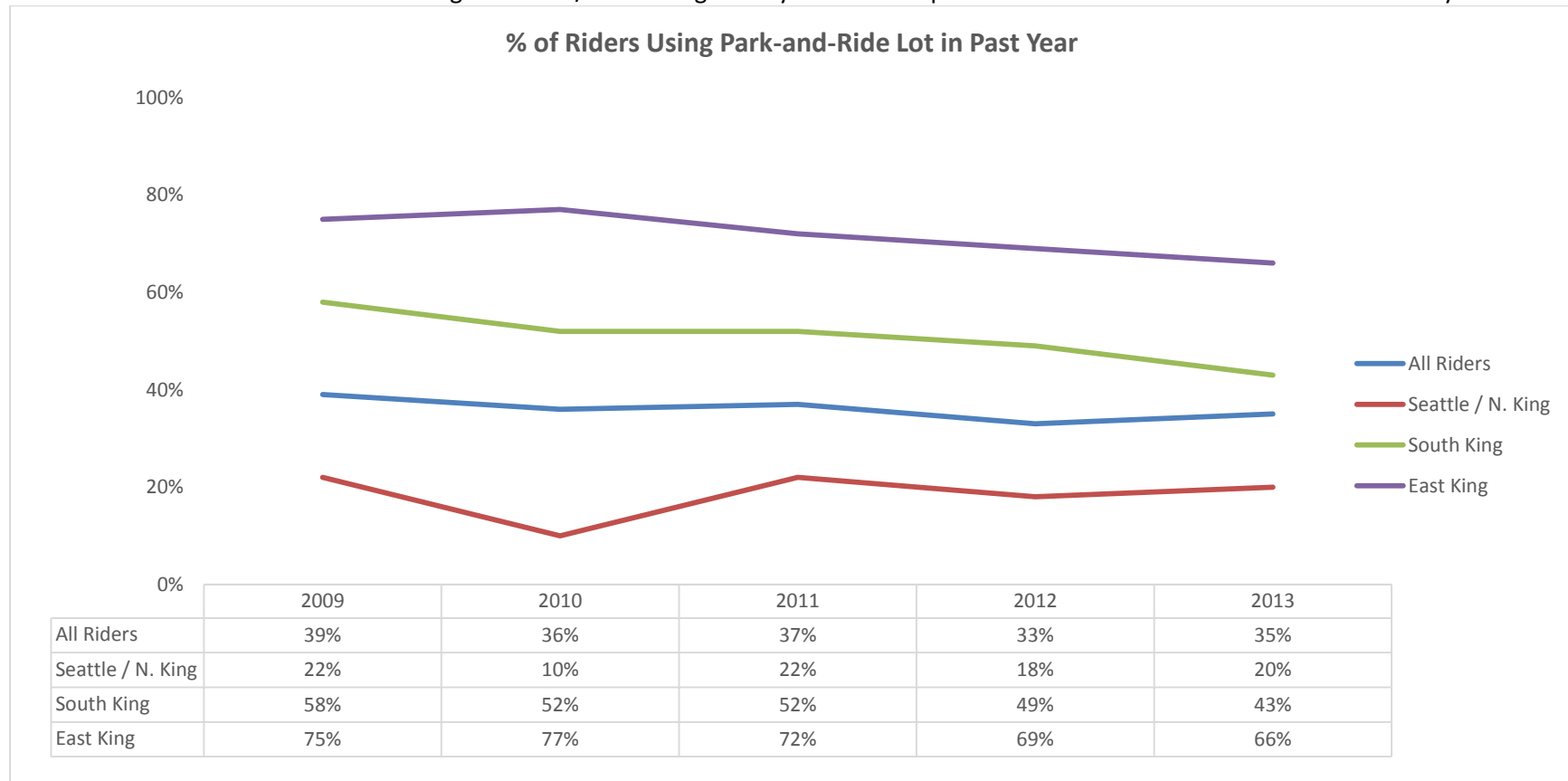
Question PR1: *Have you used a Metro park and ride lot within the last year?*

Base*: All Riders; see table page 214 for sample sizes by years.*

King County METRO

Figure 37: Riders' Use of Park-and-Ride Lot in Past 30 Days

Seven out of ten Riders who have used a park-and-ride lot in the past year have used one in the 30 days prior to being surveyed.

- Regular Riders were more likely than Infrequent Riders to have recently used a park-and-ride lot—75 percent compared to 63 percent, respectively. Not surprisingly, frequency of recent use is related to frequency of riding.

Overall Use of Park-and-Ride Lot in Past 30 Days

Used 70%

Not Used 30%

Average Number of Times Use Park-and-Ride Lot in Past 30 Days by Frequency of Riding

Category	Value
All Riders	9.44
Frequent Regular Riders	14.40
Moderate Regular Riders	6.96
Infrequent Riders	4.21
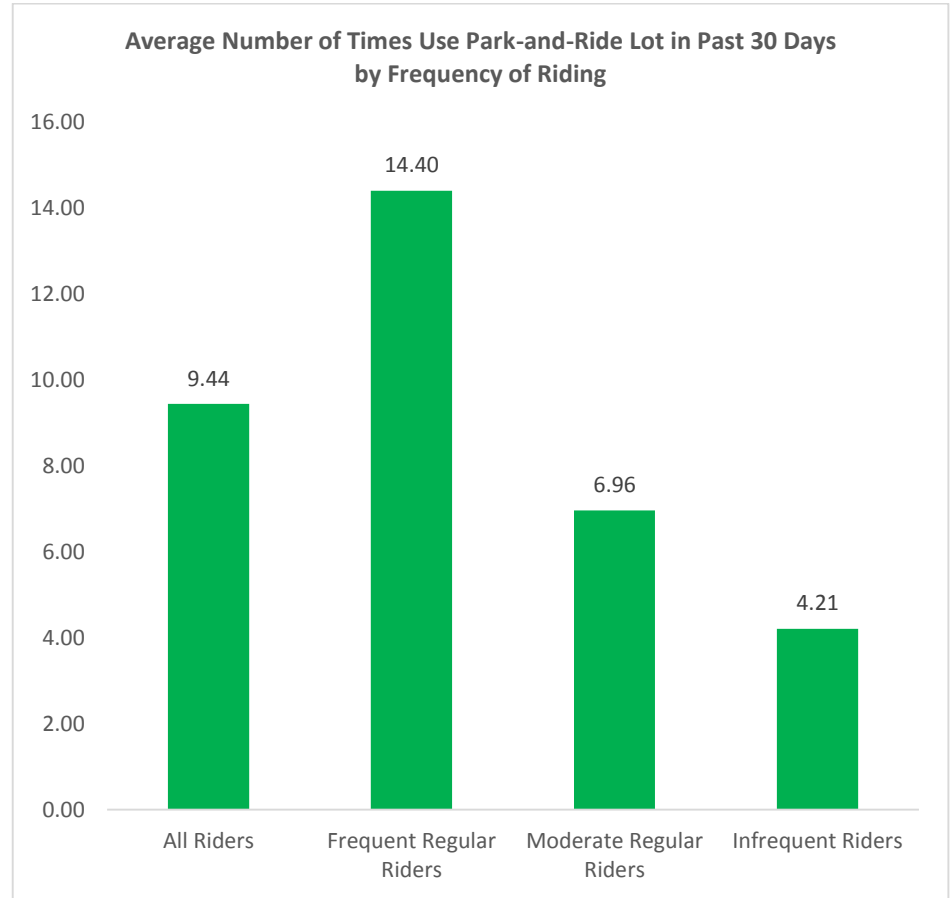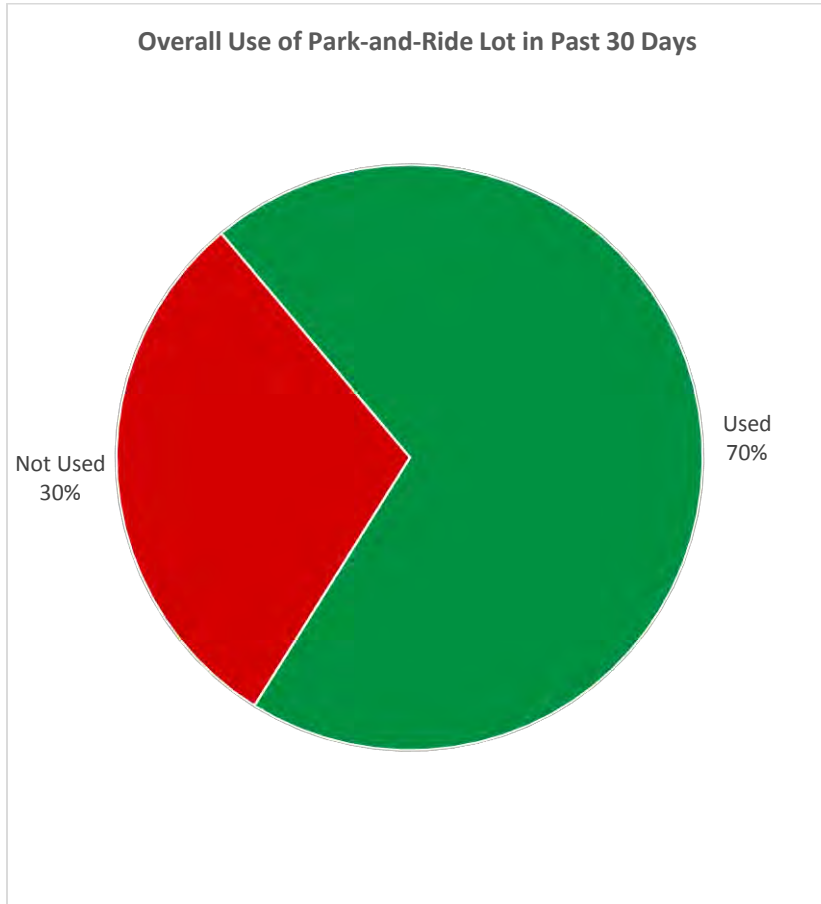
Question PR2B: How many times have you used Metro's park-and-ride lots in the last 30 days?
Base: Regular and Infrequent Riders who have used park-and-ride lot in past year (n = 588) (n$_w$ = 483)

Base: Regular and Infrequent Riders who have used park-and-ride lot in past 30 days (n = 472) (n$_w$ = 337)

King County METRO

Figure 38: Distance from Home to Park-and-Ride Lot Used

Riders living in East King County who use park-and-ride lots have a park-and-ride lot closer to their home than do those living in Seattle / North and South King County.

- More than half of park-and-ride lot users living in East King County have a lot within two miles of their home.

- Nearly one out of four Metro Riders using park-and-ride lots and who live in South King County travel six or more miles to the park-and-ride lot they use.

Distance from Home to Park-and-Ride Lot Used by Area of Residence				
	All Riders (n = 472) (nw = 337)	Seattle / N. King (n = 55) (nw = 79) (A)	South King (n = 157) (nw = 129) (B)	East King (n = 260) (nw = 129) (C)
< 1 Mile	13%	16%	11%	12%
1–2 Miles	33%	31%	23%	45% (B)
3–5 Miles	38%	40%	41%	34%
6–10 Miles	12%	6%	19% (a)	9%
>10 Miles	4%	7%	5%	1%
Mean	3.98	4.15 (C)	4.77 (CB)	3.09
Median	3.00	3.00	4.00	2.00

Question PR2C: How far is it from your home to the park-and-ride lot you use most often?
Responses provided in blocks or miles; converted to miles assuming 10 blocks per mile
Columns may sum to more or less than 100% due to rounding.
Base: Regular and Infrequent Riders who have used park-and-ride lot in past 30 days

Figure 39: Accessing Park-and-Ride Lots

Nearly three out of four Riders who use a park-and-ride lot drive alone and park.

- This is notable for Riders living in East King County, who are also the heaviest users of park-and-ride lots.

	Accessing Park-and-Ride Lots			
	All Riders (n = 472) (n$_w$ = 337)	**Seattle / N. King** (n = 55) (n$_w$ = 79) (A)	**South King** (n = 157) (n$_w$ = 129) (B)	**East King** (n = 260) (n$_w$ = 129) (C)
Drive Alone	74%	67%	73%	79%
Ride with Someone Else	11%	19% (b)	6%	11%
Bus	6%	3%	11%	3%
Walk / Bike	6%	12% (c)	5%	3%
Dropped Off	3%	0%	4%	4%

Question PR2D: How far is it from your home to the park-and-ride lot you use most often?
Columns may sum to more or less than 100% due to rounding.
Responses provided in blocks or miles; converted to miles assuming 10 blocks per mile
Base: Regular and Infrequent Riders who have used park-and-ride lot in past 30 days

King County METRO

RIDERS' SATISFACTION WITH METRO SERVICE

Riders (Regular and Infrequent Riders) are asked to indicate their overall satisfaction with Metro as well as their satisfaction with individual elements of service. While the majority of service elements have been included each year, new questions are added to address changes to service. Of note in 2013, questions were included to assess rider satisfaction with various aspects of the stops where they wait for the bus or streetcar.

Topic	What We Found	Key Stats				What It Means

Overall Satisfaction

Overall Satisfaction	While a large majority (85%) of Riders are satisfied with riding Metro, overall satisfaction has trended downwards since 2010. The decrease in overall satisfaction is greatest among Infrequent Riders and, to a lesser extent, Moderate Regular Riders. There has also been a significant decrease in the percentage of "very satisfied" Riders among those who use Metro to commute.	**Overall Satisfaction**				While satisfaction levels remain high, the growing dissatisfaction should be a cause of concern as word of mouth can be significant and lower levels of satisfaction can erode overall goodwill and support for future changes to policies and services. The focus should be on understanding the root causes of this erosion in satisfaction as it may discourage choice Riders from taking incremental trips on Metro.
			Total Satis-fied	Very Satis-fied	Dis-satisfied	
		2010	94%	49%	6%	
		2011	91% ↓	50%	9%	
		2012	88% ↓	46%	12%	
		2013	85% ↓	42%	15%	

Most Satisfied	Most of the top performing elements of service are related to fare payment—overall satisfaction with the ORCA Card, ease of paying fares when boarding, and ease of adding value to an E-Purse or ease of loading a pass onto an ORCA Card. Drivers—their courtesy and the safety and competence when operating their vehicles are also top performing service elements.	**Most Satisfied 65% + Very Satisfied**			Metro clearly has high levels of satisfaction (measured by % very satisfied) for many of its services, notably elements of service related to fare payment and drivers.
			Total Satisfied	Very Satisfied	
		ORCA Card	97%	83%	
		Ease of paying fares	96%	76%	
		Driver courtesy	95%	73%	
		Safe bus operation	95%	77%	
		Lighting on vehicles	94%	65%	
		Adding value to E-Purse	93%	71%	
		Sidewalks at stops	93%	67%	
		Loading pass on Card	90%	68%	

Topic	What We Found	Key Stats	What It Means
Least Satisfied	Four of the nine lowest performing elements of service are related to the Rider's experience while waiting at stops—lighting, availability of shelters and/or seating, and cleanliness. Riders' satisfaction with crowding on vehicles continues to be low, as does their satisfaction with personal safety while riding or waiting after dark.	**Least Satisfied < 40% Very Satisfied** 		Total Satisfied	Very Satisfied
---	---	---
Lighting at stops	68%	33%
Crowding on vehicles	69%	29%
Shelters at stops	71%	33%
Seating at stops	71%	35%
Wait time transferring	74%	35%
Dark-Safety Waiting	76%	31%
Dark-Safety Riding	81%	30%
Online posting of delays	83%	35%
Cleanliness of stops	84%	38%		Elements of service achieving satisfaction levels below 40 percent "very satisfied" should be a cause for concern as this would suggest that the majority of Riders are dissatisfied with some aspect of delivery. This does not imply they are completely dissatisfied with a specific element of service. Rather this would suggest that some aspect of that specific service is an issue or that the problem is not a universal issue system-wide but rather could be isolated to specific areas or routes.
Fare Payment	Riders are clearly satisfied with the ORCA Card and the ease with paying fares when boarding. Riders see increasing value in the service they receive for the fare they pay.	**% Very Satisfied** |	2011	2012	2013
ORCA Card	82%	82%	83%
Ease of paying fares	68%	76%	76%
Value of service for fare paid		56%	62% ↑
Overall Mean*	4.59	4.72	4.71	 *Mean based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied" Overall mean is average of service elements contained in this dimension.*	Metro should continue to encourage use of ORCA as it contributes significantly to the ease of paying fares when boarding. Increasing awareness of the different products that can be loaded on the card may encourage greater use of ORCA.

Topic	What We Found	Key Stats	What It Means

Drivers

Metro drivers are a clear strength for the agency and overall customer satisfaction with driver performance has been consistent over the years.

Rider satisfaction has improved significantly for how effectively drivers handle problems or incidents on the bus or streetcar as well as for how safely and competently they operate the vehicles.

% Very Satisfied			
	2011	2012	2013
Safe vehicle operation	71%	73%	77%
Courtesy	67%	68%	73%
Helpfulness	62%	66%	64%
Handling incidents	49%	60% ⬆	64%
Smooth stops / starts			62%
Overall Mean*	4.47	4.52	4.53

* Mean based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied" Overall mean is average of service elements contained in this dimension with the exception of drivers start and stop bus smoothly

Metro should let drivers know the extent to which Riders value the service they provide and provide ongoing recognition of outstanding performance.

At the same time, Metro should continue to provide training on how to effectively handle problems on the bus when they occur.

Information

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

Riders are less satisfied with the accuracy of printed timetables than their availability.

Notification of service changes and website postings of delays or problems are potential issues.

% Very Satisfied			
	2011	2012	2013
Overall ability to get information	59%	59%	60%
Metro Online	52%	62% ⬆	60%
Ability to get timetables	54%	49%	52%
Alerts	53%	43%	49%
Accuracy of timetables		46%	44%
Service change notifications		40%	41%
Online post-ings of delays		39%	35%
Overall Mean*	4.29	4.29	4.32

* Mean based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied" Overall mean is average of service elements contained in this dimension

Metro should focus on efforts providing better notifications of service changes—notably reasons behind the change. The extent to which reasons are given would depend on the nature of the service change—for instance, little information would be needed for small route changes but greater information might be given for major route changes or major service cuts.

As Riders increasingly rely on their smartphones for real-time information, timely and accurate posting of delays or other problems will become increasingly important.

Topic	What We Found	Key Stats	What It Means
Park-and-Ride Lots	Riders who use park-and-ride lot facilities are generally satisfied. Moreover, satisfaction has remained relatively stable over time. While parking availability continues to be a concern, satisfaction with the ability to get a parking space has improved slightly over the past several years.	**% Very Satisfied** |	2011	2012	2013
Personal safety	51%	58%	52%
Vehicle security	42%	44%	40%
Parking availability	38%	42%	45%
Maintenance			62%
Lighting			54%
Overall Mean*	4.04	4.12	4.13	 *Mean based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied" Overall mean is average of service elements contained in this dimension with exception of maintenance and lighting*	Metro should continue to maintain and improve service in this area. Parking availability is likely to be a lot-specific problem and Metro could target its efforts on those lots known to have greater issues. Facility maintenance is a greater problem in Seattle / North King County. Again, this is likely to be a lot-specific issue and improvements can be highly targeted. A survey could be sent to those using specific lots (using a license plate survey as the sample frame) to identify specific issues behind facility maintenance.
Level of Service / Reliability	Satisfaction with the level and reliability of service has improved steadily over the past three years. Satisfaction has increased the most for travel time and on-time performance.	**% Very Satisfied** |	2011	2012	2013
Number of stops	45%	44%	51% ↑
Service availability	41%	46% ↑	51% ↑
On-time performance	33%	42% ↑	46% ↑
Frequency of service	36%	41% ↑	45%
Travel time	32%	41% ↑	43%
Overall Mean*	3.89	4.01 ↑	4.17 ↑	 *Mean based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied" Overall mean is average of service elements contained in this dimension*	Metro has made significant strides in these highly important aspects of service and this should continue to be a focus for improvement. Continued improvements in travel time would be viewed most positively by those living in Seattle / North and South King County. The introduction of RapidRide E & F Lines should have a positive impact. Improvements in on-time performance would be viewed most positively by those living in Seattle / North King County.

King County METRO

Topic	What We Found	Key Stats	What It Means
Comfort while Riding	Satisfaction with comfort and cleanliness of bus and streetcar interiors improved significantly between 2012 and 2013. This is due in large part to greater satisfaction with those aspects of comfort related to crowding—while on the bus as well as while boarding and getting off.	**% Very Satisfied** |	2011	2012	2013
Comfort / cleanliness	40%	47% ⬆	46%
Seating available	42%	40%	47% ⬆
Crowding on the bus	25%	23%	29% ⬆
Ease of boarding		35%	48% ⬆
Lighting			65%
Overall Mean*	3.90	3.89	4.04 ⬆	 ** Mean based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied" Overall mean does not include lighting on the bus*	The changes to boarding and alighting processing resulting from requiring fare payment when boarding has clearly paid off, notably after Riders had time to learn to adjust to these changes. Overcrowding continues to be a significantly bigger issue on routes serving the Seattle / North King and, to a lesser extent, South King former planning areas. Additional service on targeted routes where crowding is a significant problem should be considered.
Comfort while Waiting	Riders are less satisfied with the comfort and cleanliness at stops than with comfort and cleanliness while riding. Riders are least satisfied with the availability of seating and shelters at stops and the cleanliness of stops and shelters.			**% Very Satisfied**
---	---
	2013*
Availability of sidewalks	67%
Distance from home to stop	64%
Ease of getting on / off due to crowding	50%
Cleanliness of stops / shelters	38%
Availability of seating	35%
Availability of shelters	33%
Overall mean*	4.03	 ** Mean based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied" New service dimension added in 2013; trending not applicable*	Metro should place greater focus on those aspects of stop comfort and cleanliness that are most important to the overall rider experience. Particular focus should be paid to improvements in South King County where satisfaction is generally lower.

King County METRO

Topic	What We Found	Key Stats	What It Means
Safety & Security	Nighttime safety while riding and while waiting continues to get relatively low satisfaction marks. Moreover, Rider satisfaction with safety has been eroding for daytime safety—notably while riding—and for safety in the transit tunnel.	**% Very Satisfied** |	2011	2012	2013
Daytime safety waiting	67%	63% ↓	63%
Daytime safety riding	58%	54% ↓	51% ↓
Safety in transit tunnel	56%	50% ↓	48% ↓
Nighttime safety riding	33%	34%	30%
Nighttime safety waiting	28%	29%	31%
Overall Mean*	4.18	4.23	4.14	 *Overall mean is average across all elements of service in this dimension and is based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied"*	In 2010, significant efforts were put towards safety and security following several well-publicized incidents. Current perceptions may be eroding due to less visibility of transit police in the tunnel and other key areas. Negative publicity surrounding events immediately before and during the survey periods may also be contributing to the decrease in Rider satisfaction. The decline in Rider satisfaction with safety during the day should be a concern.
Transferring	Riders continue to be least satisfied with the two elements of service related to transferring. While overall satisfaction with transferring has not changed significantly, there has been a significant increase in the percentage of Riders who are very satisfied with wait time when transferring.	**% Very Satisfied** |	2011	2012	2013
Number of transfers	39%	41%	44%
Wait time	24%	27%	35% ↑
Overall Mean*	3.81	3.79	3.86	 *Mean based on 5-point scale where "1" = "very dissatisfied" and "5" = "very satisfied"*	While clearly still a problem area, some strides have been made in this area. Metro should continue to focus on scheduling to minimize wait times when transferring.

King County METRO

Overall Customer Satisfaction

Figure 40: Overall Customer Satisfaction—All Riders

While the majority of Metro Riders are satisfied with Metro service overall, the total percentage satisfied has trended downwards since 2010.

- The percentage of Metro Riders who are *very* satisfied with Metro's overall service has trended downwards since 2011. The percentage of Metro Riders who are dissatisfied has more than doubled since 2010.
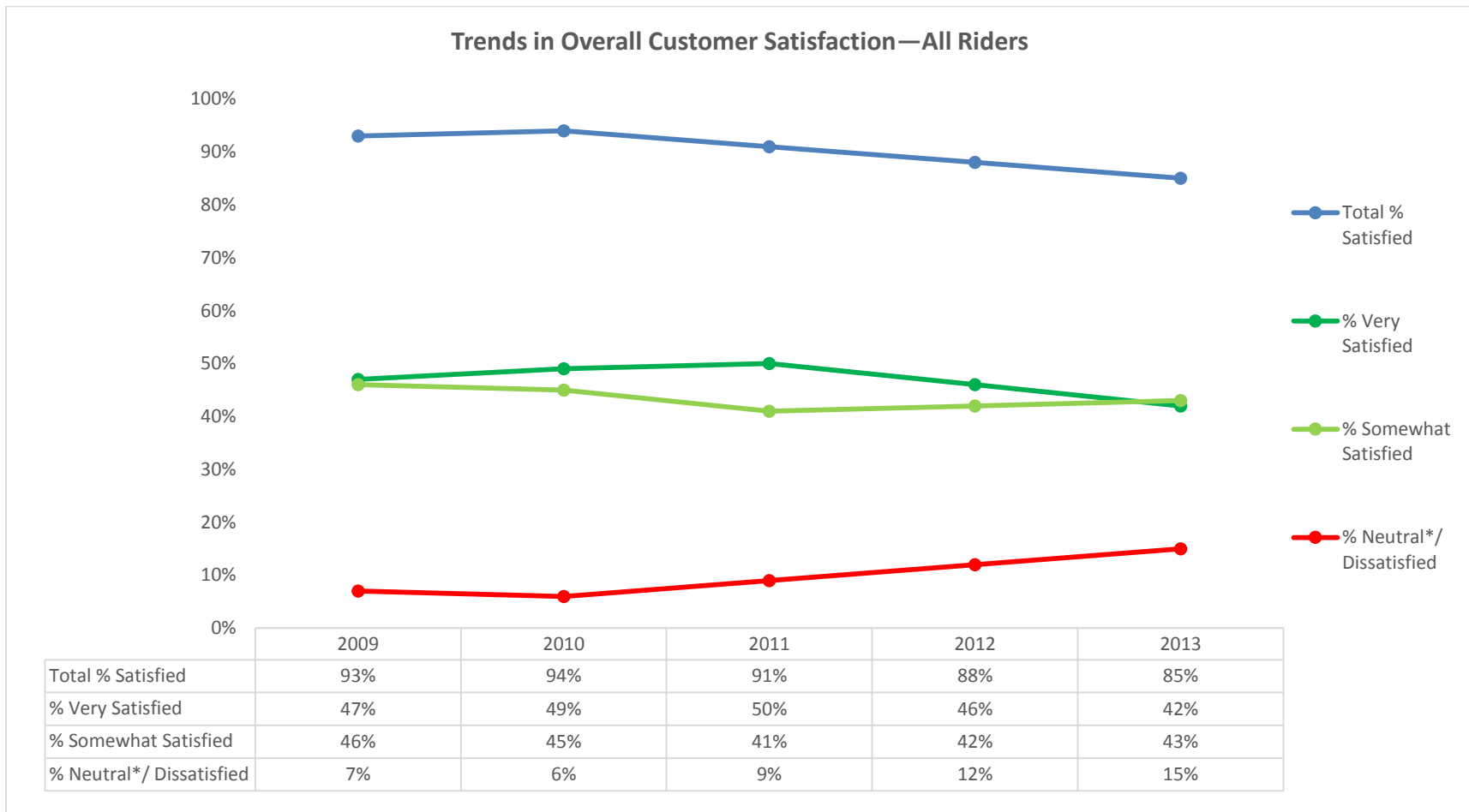
Trends in Overall Customer Satisfaction—All Riders

	2009	2010	2011	2012	2013
Total % Satisfied	93%	94%	91%	88%	85%
% Very Satisfied	47%	49%	50%	46%	42%
% Somewhat Satisfied	46%	45%	41%	42%	43%
% Neutral*/ Dissatisfied	7%	6%	9%	12%	15%

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

Base: All Riders; see table on page 214 for sample sizes by years.

*Columns may sum to more or less than 100% due to rounding. * Neutral is generally less than 1–2%.*

Figure 41: Overall Customer Satisfaction—Rider Segments

There are significant differences in overall satisfaction across the different Rider segments.

Infrequent Riders are the least satisfied with Metro.

- The percentage of satisfied Infrequent Riders has decreased by 12 percentage points since 2010 while the percentage who are dissatisfied has doubled.

While there is little difference in the total percentage satisfied between Frequent and Moderate Regular Riders, somewhat fewer Moderate Regular Riders are "very satisfied" and the percent "very satisfied" has seen a steeper drop since 2010 among Moderate Regular Riders.

	2009	2010	2011	2012	2013
All Regular Riders					
Total % Satisfied	93%	95%	92%↓	89%↓	88%
Very Satisfied	51%	51%	54%	48%↓	44%↓
Somewhat Satisfied	42%	44%	38%	41%	44%
Neutral* / Dissatisfied	7%	5%	8%↑	11%↑	12%
Frequent Regular Riders					
Total % Satisfied	92%	96%	93%↓	91%↓	89%↓
Very Satisfied	52%	52%	58%↑	49%↓	47%
Somewhat Satisfied	40%	44%	35%	42%	42%
Neutral* / Dissatisfied	7%	4%	7%↑	10%↑	11%↑
Moderate Regular Riders					
Total % Satisfied	93%	92%	89%↓	85%↓	87%
Very Satisfied	49%	49%	45%	47%	38%↓
Somewhat Satisfied	44%	43%	44%	38%	48%
Neutral* / Dissatisfied	6%	7%	10%↑	15%↑	13%
Infrequent Riders					
Total % Satisfied	91%	92%	89%	88%↓	80%↓
Very Satisfied	39%	46%	42%	43%	37%
Somewhat Satisfied	52%	46%	47%	45%	42%
Neutral* / Dissatisfied	9%	9%	11%	12%	21%↑

Question GW1A: Overall, would you say you are satisfied or dissatisfied with Metro?
Base: All Riders; see table on page 214 for sample sizes by years.
Columns may sum to more or less than 100% due to rounding.
* Neutral is generally less than 1–2%.
↑ = Significant (95%) increase from previous years; ↑ = Significant (90%) increase from previous years
↓ = Significant (95%) decrease from previous years; ↓ = Significant (90%) decrease from previous years

Figure 42: Trends in Overall Customer Satisfaction—Metro Bus Commuters versus Riders Who Drive Alone to Work

Riders who commute using Metro are significantly more satisfied with Metro than are those Riders who drive alone to work.

- Among those Riders who drove alone to work, the total percentage satisfied with Metro dropped sharply, due to a decrease in the percentage *very* satisfied. Moreover, the percentage dissatisfied has increased significantly since 2012.

- The percentage of "very satisfied" Riders who commute to work by Metro has been decreasing since 2011 and is at its lowest level in the past five years.

	2009	2010	2011	2012	2013
	Metro Bus Commuters				
Total % Satisfied	94%	96%	92%	90%	88%
Very Satisfied	52%	50%	56%⬆	48%⬇	44%⬇
Somewhat Satisfied	42%	46%	36%	42%	44%
Neutral* / Dissatisfied	6%	4%	8%	10%	12%
	Riders Who Drive Alone to Work				
Total % Satisfied	89%	89%	86%	82%⬇	74%⬇
Very Satisfied	30%	38%	35%	39%	32%⬇
Somewhat Satisfied	59%	51%	51%	43%⬇	42%
Neutral* / Dissatisfied	11%	10%	13%	18%⬆	26%⬆

Question GW1A: Overall, would you say you are satisfied or dissatisfied with Metro?
Base: *All Riders; see table on page 214 for sample sizes by years.*
Columns may sum to more or less than 100% due to rounding.
* Neutral is generally less than 1–2%.
⬆ = Significant (95%) increase from previous years; ⬆ = Significant (90%) increase from previous years
⬇ = Significant (95%) decrease from previous years; ⬇ = Significant (90%) decrease from previous years

Riders' Satisfaction with Individual Service Elements

In addition to providing an overall satisfaction rating, Regular and Infrequent Riders provided feedback as to their satisfaction with 48 individual elements of service, 10 of which were new in 2013. One of the new service elements (availability of information in Spanish) is not included in this analysis due to small sample size.

Riders are generally satisfied with all elements of service. At least two-thirds of all Riders are at least somewhat satisfied with all elements of service, and mean ratings are 3.62 and higher, well above the scale midpoint (3.00).

The individual service elements are grouped into four categories based on the percentage very satisfied:

- **Most Satisfied**: 65 percent or greater of Riders saying they are very satisfied with that element of service

- **Satisfied**: 50 to 64 percent of Riders saying they are very satisfied with that element of service

- **Less Satisfied**: 40 to 49 percent of Riders saying they are very satisfied with that element of service

- **Least Satisfied**: Less than 40 percent of Riders saying they are very satisfied with that element of service

The four charts that follow provide listings of which elements of service fall into each of these four categories.

Figure 43: Most Satisfied
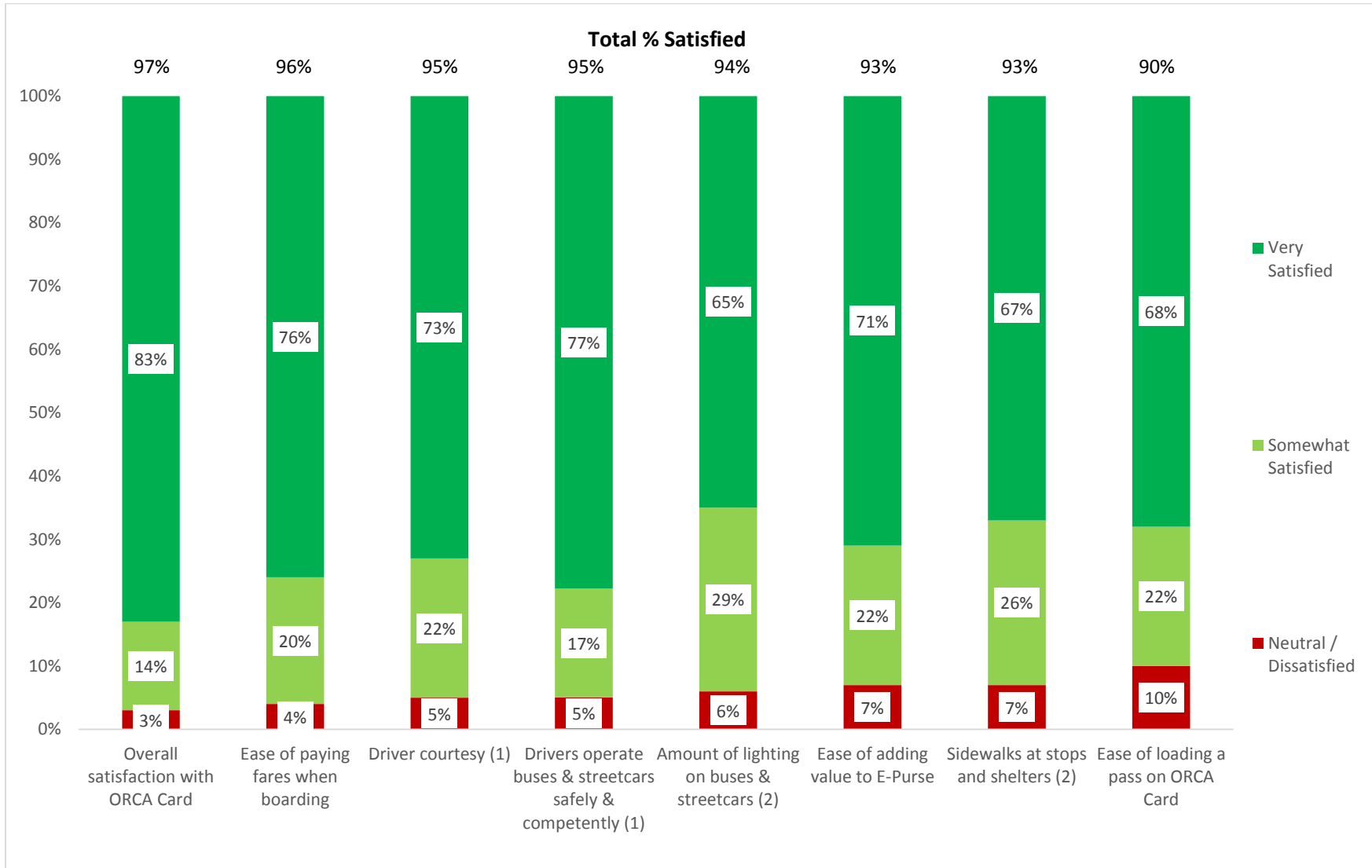
Total % Satisfied

	Overall satisfaction with ORCA Card	Ease of paying fares when boarding	Driver courtesy (1)	Drivers operate buses & streetcars safely & competently (1)	Amount of lighting on buses & streetcars (2)	Ease of adding value to E-Purse	Sidewalks at stops and shelters (2)	Ease of loading a pass on ORCA Card
Total	97%	96%	95%	95%	94%	93%	93%	90%
Very Satisfied	83%	76%	73%	77%	65%	71%	67%	68%
Somewhat Satisfied	14%	20%	22%	17%	29%	22%	26%	22%
Neutral / Dissatisfied	3%	4%	5%	5%	6%	7%	7%	10%

To minimize survey length, Regular and Infrequent Riders were randomly assigned to one of two groups. Questions are grouped into categories representing an overall dimension of service. A category of questions was then assigned to a rider group. Those elements of service marked with a (1) were asked of Group 1 Riders and those marked with a (2) were asked of Group 2 Riders. Those elements of service not marked with a (1) or (2) were asked of all Regular and Infrequent Riders; base size varies based on use of corresponding element of service.
Base: Group 1 (n = 705) (nw = 720) Group 2 (n = 690) (nw = 675)

Figure 44: Satisfied
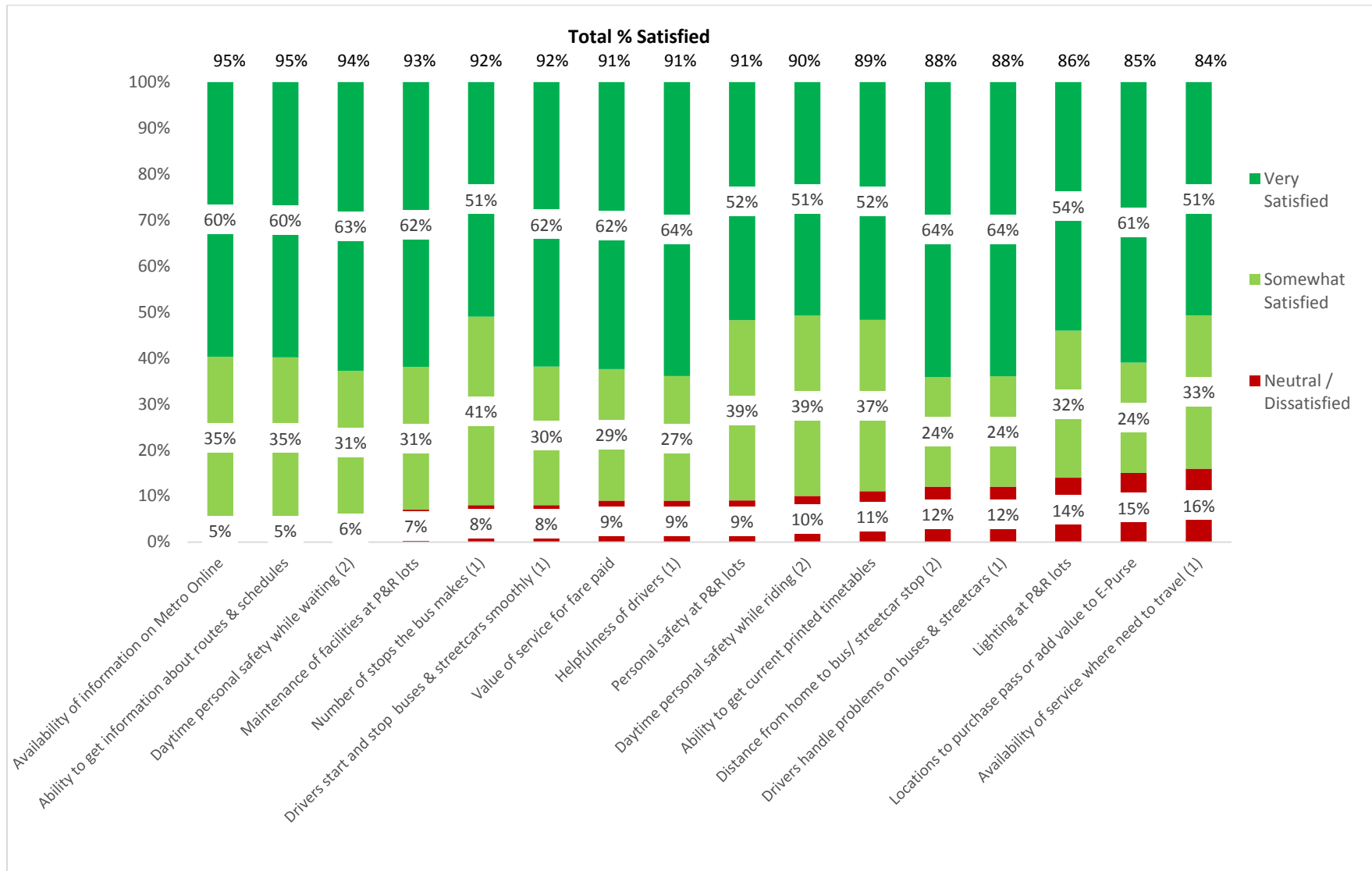
Total % Satisfied

Element	Total % Satisfied	Very Satisfied	Somewhat Satisfied	Neutral / Dissatisfied
Availability of information on Metro Online	95%	60%	35%	5%
Ability to get information about routes & schedules	95%	60%	35%	5%
Daytime personal safety while waiting (2)	94%	63%	31%	6%
Maintenance of facilities at P&R lots	93%	62%	31%	7%
Number of stops the bus makes (1)	92%	51%	41%	8%
Drivers start and stop buses & streetcars smoothly (1)	92%	62%	30%	8%
Value of service for fare paid	91%	62%	29%	9%
Helpfulness of drivers (1)	91%	64%	27%	9%
Personal safety at P&R lots	91%	52%	39%	9%
Daytime personal safety while riding (2)	90%	51%	39%	10%
Ability to get current printed timetables	89%	52%	37%	11%
Distance from home to bus/ streetcar stop (2)	88%	64%	24%	12%
Drivers handle problems on buses & streetcars (1)	88%	64%	24%	12%
Lighting at P&R lots	86%	54%	32%	14%
Locations to purchase pass or add value to E-Purse	85%	61%	24%	15%
Availability of service where need to travel (1)	84%	51%	33%	16%

To minimize survey length, Regular and Infrequent Riders were randomly assigned to one of two groups. Questions are grouped into categories representing an overall dimension of service. A category of questions was then assigned to a rider group. Those elements of service marked with a (1) were asked of Group 1 Riders and those marked with a (2) were asked of Group 2 Riders. Those elements of service not marked with a (1) or (2) were asked of all Regular and Infrequent Riders; base size varies based on use of corresponding element of service.

Base: Group 1 (n = 705) (n$_w$ = 720) Group 2 (n = 690) (n$_w$ = 675)

Figure 45: Less Satisfied
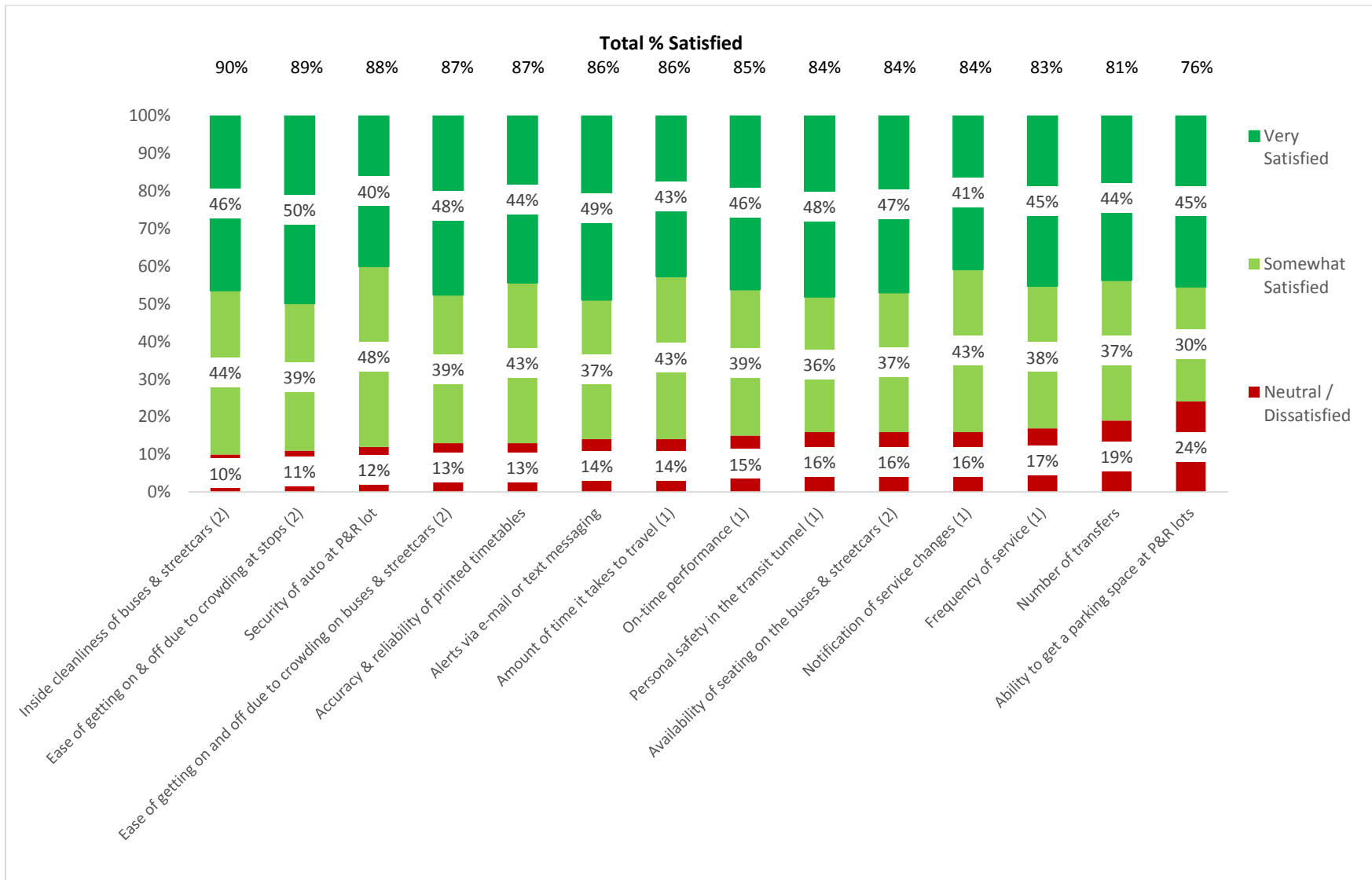
To minimize survey length, Regular and Infrequent Riders were randomly assigned to one of two groups. Questions are grouped into categories representing an overall dimension of service. A category of questions was then assigned to a rider group. Those elements of service marked with a (1) were asked of Group 1 Riders and those marked with a (2) were asked of Group 2 Riders. Those elements of service not marked with a (1) or (2) were asked of all Regular and Infrequent Riders; base size varies based on use of corresponding element of service.

Base: Group 1 (n = 705) (n$_w$ = 720) Group 2 (n = 690) (n$_w$ = 675)

Figure 46: Least Satisfied
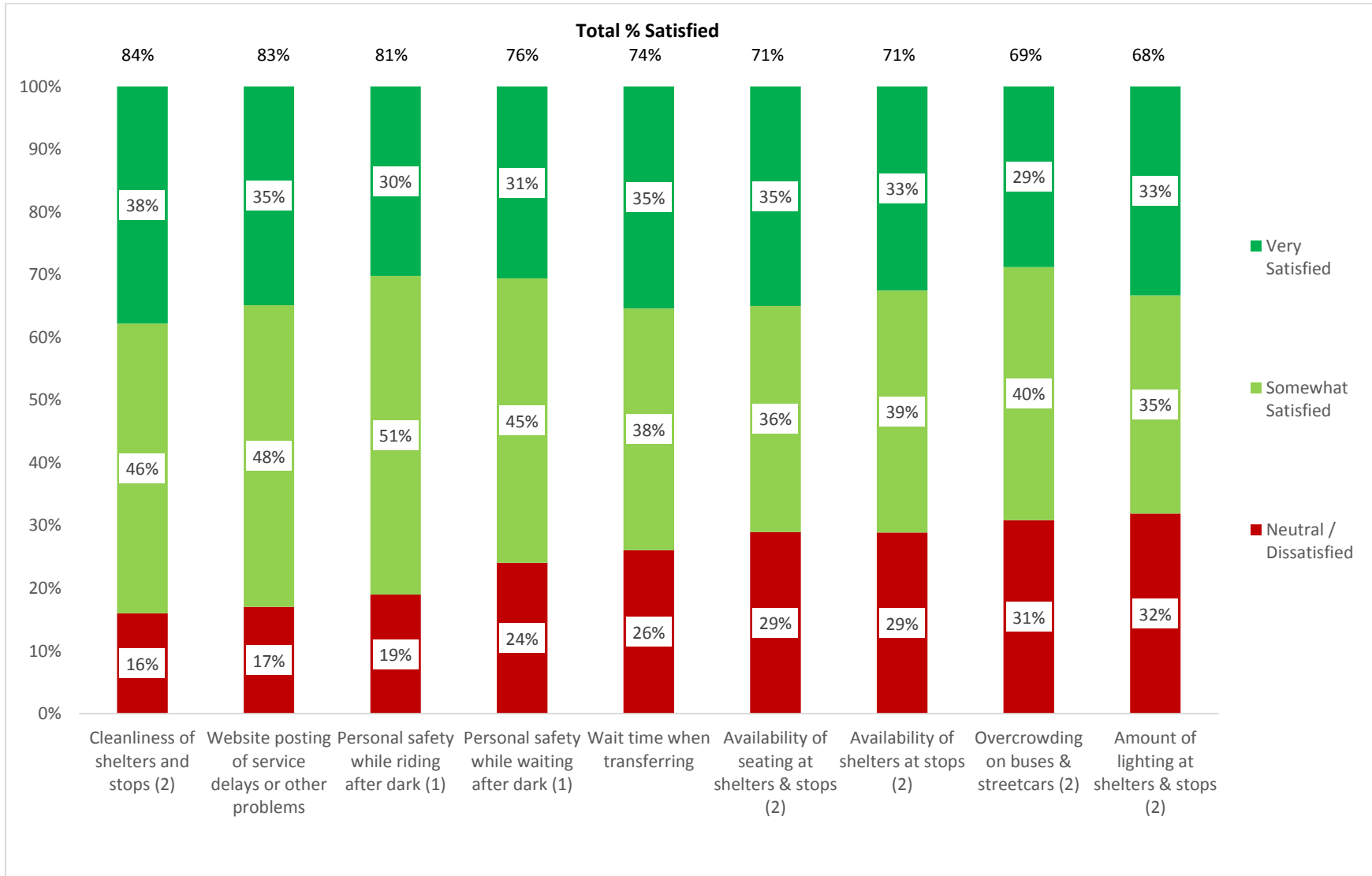
To minimize survey length, Regular and Infrequent Riders were randomly assigned to one of two groups. Questions are grouped into categories representing an overall dimension of service. A category of questions was then assigned to a rider group. Those elements of service marked with a (1) were asked of Group 1 Riders and those marked with a (2) were asked of Group 2 Riders. Those elements of service not marked with a (1) or (2) were asked of all Regular and Infrequent Riders; base size varies based on use of corresponding element of service.

Base: Group 1 (n = 705) (n_w = 720) Group 2 (n = 690) (n_w = 675)

Figure 47: Significant Differences in Satisfaction between Regular and Infrequent Riders

Despite lower overall satisfaction with Metro among Infrequent Riders, there are only eight out of a total of 48 individual elements of service where there are significant differences in percent very satisfied between Infrequent and Regular Riders. Moreover, in seven out of these eight cases, Infrequent Riders are more satisfied than Regular Riders.

- Among park-and-ride lot users, Regular Riders are significantly less satisfied than Infrequent Riders with the maintenance of the facilities.

- Regular Riders are less satisfied with on-time performance and wait times when transferring than are Infrequent Riders.

- Reflecting the times that they ride, Regular Riders are more likely to suggest they have problems with overcrowding on the bus and when getting on and off the bus. They are also less satisfied with drivers stopping and starting the bus or streetcar smoothly. This may also reflect crowding on the bus and the fact that more Riders are standing.

- Infrequent Riders are less satisfied than Regular Riders with the ease of paying fares when boarding. This may be due to the fact that more Infrequent Riders are using cash as well as less familiarity with how to use the ORCA Card.

Differences in % Very Satisfied with Individual Elements of Service between Regular and Infrequent Riders

Element of Service	Infrequent	Regular
Maintenance of facilities at park-and-ride lots	76%	56%
Availability of seating on buses / streetcars	59%	40%
On-Time Performance	56%	40%
Wait time when transferring	45%	30%
Ease of getting on and off bus due to crowding	57%	42%
Drivers start and stop bus / streetcar smoothly	70%	57%
Overcrowding	35%	25%
Ease of paying fares when boarding	71%	79%

Base size varies based on use of corresponding element of service and group assignments

King County METRO

Figure 48: Significant Differences in Satisfaction between 2012 and 2013

There were relatively few significant changes in Rider satisfaction with the individual elements of service between 2012 and 2013. Significant difference in the percent very satisfied changed for only six out of the 48 elements measured. Moreover, where satisfaction has changed significantly, the percent very satisfied has increased.

- The greatest increase in satisfaction was for the value of service received for the fare paid.
  - This is noteworthy among Riders living in Seattle / North King County—the percent very satisfied increased from 53 to 66 percent in this area.
- Satisfaction with the ease of getting on and off the bus due to crowding increased significantly. Satisfaction with the availability of seating on the buses and overcrowding has also improved somewhat.
  - Rider satisfaction with the ease of getting on and off the buses or streetcars due to crowding increased the most in East King County—the percent very satisfied increased from 49 to 64 percent in this area.
- Satisfaction also increased with the number of stops and wait time when transferring.
  - Rider satisfaction with the number of stops increased the most in Seattle / North King County—the percent very satisfied increased from 41 to 48 percent in this area.
  - Rider satisfaction with wait time when transferring increased the most in South King County—the percent very satisfied increased from 25 to 41 percent in this area.

The detailed analysis of trends in satisfaction with individual elements of service on the following pages provides greater insights on progress toward improved customer satisfaction.

Significant Changes in % Very Satisfied with Individual Elements of Service

Element	2013	2012
Value of service for fare paid	62%	56%
Overcrowding	29%	23%
Availablity of seating on the buses	47%	40%
Number of stops	51%	44%
Wait time when transferring	35%	27%
Ease of getting on / off bus due to crowding	48%	35%
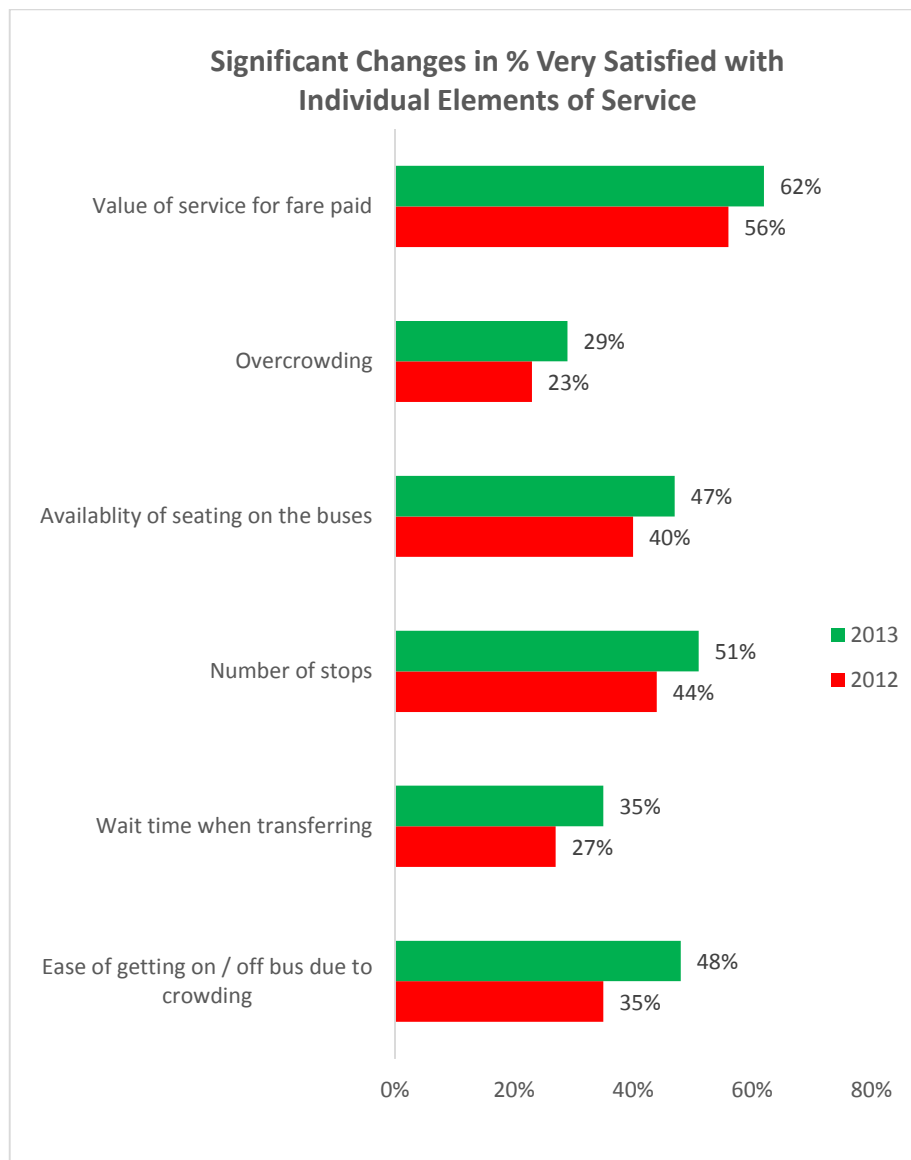
Base size varies based on use of corresponding element of service and group assignments

Detailed Analysis of Trends in Satisfaction with Individual Elements of Service

Factor analysis has been used over the years to identify major dimensions of service that represent groupings of individual service elements that are correlated. Nine dimensions have been identified through this analysis and are named based on the service elements in the dimension.

- **Level of Service / Reliability**: Number of stops, on-time performance, availability of service to where riders need to go, travel time, frequency of service

- **Comfort / Cleanliness of Bus / Streetcar Interior**: Amount of lighting, inside cleanliness, ease of getting on or off due to crowding, availability of seating, overcrowding on the buses / streetcars

- **Comfort / Cleanliness of Bus Stops**: Availability of sidewalks, distance to / from stop, ease of getting on / off the bus / streetcar due to crowding at stops, cleanliness of shelters and stops, availability of shelters, availability of seating at shelters and stops, amount of lighting

- **Drivers**: Safe / competent operation of buses and streetcars, driver courtesy, helpfulness with route and schedule information, stop and start smoothly, effective handling of problems on the bus

- **Transferring**: Number of transfers, wait time when transferring

- **Fare Payment**: Overall satisfaction with ORCA Card, ease of paying fares, ease of loading pass to ORCA Card, or adding value to E-Purse, value of service for fare paid, availability of locations to purchase pass or add value to E-Purse

- **Safety and Security**: Safety waiting for the bus during the daytime, safety riding the bus during the daytime, safety in the downtown transit tunnel, safety waiting the bus after dark, safety riding for the bus after dark

- **Park-and-Ride Lots**: Maintenance of facilities, personal safety, lighting, security of vehicles, ability to get parking

- **Information**: Availability of service information on Metro Online, overall ability to get information about routes and schedules, ability to get current printed timetables, alerts via email or text messages, accuracy / reliability of printed timetables, availability of information about Metro in Spanish, website posting of service delays or other problems, notification of service changes

Figure 49: Overall Satisfaction with Primary Service Dimensions

An overall mean was computed for each primary service dimension. Riders are most satisfied with fare payment and Metro drivers and, to a lesser extent, with Metro sources of information. They are least satisfied with transferring and the comfort and cleanliness at bus stops.

Overall Means for Primary Service Dimensions
(based on 5-point scale where "1" means "very dissatisfied" and "5" means "very satisfied")

Dark green indicates significantly above the overall average performance; light green indicates above the overall average performance; yellow indicates below the overall average performance; red indicates significantly below the overall average performance.
Overall average performance = 4.21.

Dimension	Mean
Fare Payment	4.56
Drivers (1)	4.51
Metro Sources of Information	4.32
Park-and-Ride Lots	4.20
Level of Service / Reliability (1)	4.17
Safety / Security (2)	4.14
Comfort / Cleanliness on-Board (2)	4.14
Comfort / Cleanliness at Stops (2)	4.03
Transferring	3.86

To minimize length of survey in questions included in the dimensions marked with a (1) or (2) were asked of half the sample.

Base for questions asked of Group 1: (n = 705) (n_w = 720); Base for questions asked of Group 2: (n = 690) (n_w = 675)

Base for Fare Payment and Information dimension is all Riders n = 1,395) (n_w = 1,395)

Base for Transferring dimension is Riders who transfer n = 710) (n_w = 723)

Base for Park-and-Ride Lot dimensions is Riders who used lot in previous 12 months (n = 588) (n_w = 483)

Figure 50: Satisfaction with Level of Service / Reliability

Riders are generally satisfied with the level of service provided. The 2013 percentages of total and very satisfied are at their highest levels for each of these elements in the last five years.

Riders are most satisfied with the number of stops the bus makes.

Infrequent Riders are more satisfied than Regular Riders.

Satisfaction with **Number of Stops by Rider Status**		
	Regular Riders (n = 614) (n$_w$=460) (A)	Infrequent Riders (n = 91) (n$_w$=260) (B)
Total Satisfied	88%	98% (A)
Very	51%	50%
Somewhat	37%	48%
Dissatisfied	11% (B)	2%

Does not sum to 100%; neutral responses excluded

Riders are increasingly satisfied with the availability of service to the places they need to travel and the time it takes to travel.

Riders also are increasingly satisfied with on-time performance and frequency of service.

Infrequent Riders are more likely than Regular Riders to say they are very satisfied with on-time performance.

Satisfaction with **On-Time Performance by Rider Status**		
	Regular Riders (n = 614) (n$_w$=460) (A)	Infrequent Riders (n = 91) (n$_w$=260) (B)
Total Satisfied	83%	88%
Very	40%	56% (A)
Somewhat	43%	32%
Dissatisfied	14%	11%

Does not sum to 100%; neutral responses excluded

Satisfaction with Level of Service / Reliability					
	2009 (n = 1,417) (n$_w$=1,417) (A)	2010 (n = 1,140) (n$_w$=1,139) (B)	2011 (n = 1,455) (n$_w$=1,455) (C)	2012 (n = 1,218) (n$_w$=1,218) (D)	2013* (n = 705) (n$_w$=720) (E)
Number of Stops					
Total Satisfied	84%	86%	83%↓	85%	92%↑
Very	40%	46%↑	45%	44%	51%↑
Somewhat	44%	40%	38%	41%	41%
On-Time Performance					
Total Satisfied	78%	80%	75%↓	81%↑	85%↑
Very	39%	37%	33%↓	42%↑	46%↑
Somewhat	39%	43%	42%	39%	39%
Availability of Service					
Total Satisfied	82%	83%	80%↓	82%	84%
Very	44%	44%	41%	46%↑	51%↑
Somewhat	38%	39%	39%	36%	33%
Amount of Time It Takes to Travel					
Total Satisfied	76%	77%	74%↓	80%↑	86%↑
Very	33%	33%	32%	41%↑	43%
Somewhat	43%	44%	42%	39%	43%
Frequency of Service					
Total Satisfied	79%	79%	77%	80%↑	83%↑
Very	37%	40%	36%	41%↑	45%↑
Somewhat	42%	39%	41%	39%	38%

Question M7: Are you satisfied or dissatisfied with each of the following?
* To minimize length of survey in 2013 these questions were asked of half the sample.
Base: *Regular and Infrequent Riders*
↑ *= Significant (95%) increase from previous years;* ↑ *= Significant (90%) increase from previous years*
↓ *= Significant (95%) decrease from previous years;* ↓ *= Significant (90%) decrease from previous years*

King County METRO

Riders living in South and East King County are more likely than those living in Seattle / N. King County to say they are very satisfied with on-time performance.

Satisfaction with On-Time Performance by Area of Residence

	Seattle / N. King (n = 258) (n_w=371) (A)	South King (n = 219) (n_w=225) (B)	East King (n = 228) (n_w=124) (B)
Total Satisfied	84%	86%	88%
Very	37%	57% (A)	55% (A)
Somewhat	47% (BC)	29%	33%
Dissatisfied	14%	14%	10%
Does not sum to 100%; neutral responses excluded			

Riders living in Seattle / North and South King County are more likely than those living in East King County to say they are dissatisfied with the time it takes to travel.

Satisfaction with Travel Time by Area of Residence

	Seattle / N. King (n = 258) (n_w=371) (A)	South King (n = 219) (n_w=225) (B)	East King (n = 228) (n_w=124) (C)
Total Satisfied	84%	85%	92%
Very	42%	40%	49%
Somewhat	42%	45%	43%
Dissatisfied	14% (C)	13% (C)	5%
Does not sum to 100%; neutral responses excluded			

Riders' satisfaction with frequency of service has been steadily improving. Those living in South and, to a lesser extent, Seattle / North King County are more likely than Riders in East King County to say they are very satisfied.

Satisfaction with Frequency of Service by Area of Residence

	Seattle / N. King (n = 258) (n_w=371) (A)	South King (n = 219) (n_w=225) (B)	East King (n = 228) (n_w=124) (C)
Total Satisfied	87% (B)	76%	86%
Very	43%	55% (C)	35%
Somewhat	44% (B)	21%	51% (B)
Dissatisfied	13%	20%	14%
Does not sum to 100%; neutral responses excluded			

Riders dissatisfied with frequency of service were asked follow-up questions to determine with which specific aspects of frequency they were more or less satisfied. Riders are clearly more satisfied with frequency of service during peak than during off-peak periods.

Satisfaction with Frequency of Service at Different Times of the Day

	Rush Hours	Non-Rush	Evening	Weekend
Total Satisfied	56%	36%	26%	27%
Very	18%	4%	3%	4%
Somewhat	38%	32%	23%	23%
Dissatisfied	42%	61%	73%	69%
Does not sum to 100%; neutral responses excluded				

Figure 51: Satisfaction with Comfort / Cleanliness of Bus / Streetcar Interiors

With the exception of crowding on the bus, satisfaction with comfort and cleanliness of buses and streetcars is relatively high and has been relatively stable for the past three years.

Overcrowding is a greater problem for Riders living in Seattle / North King County and, to a lesser extent, South King County than for those in East King County.

Satisfaction with Overcrowding by Area of Residence			
	Seattle / N. King (n = 251) (nw=358) (A)	South King (n = 223) (nw=203) (B)	East King (n = 216) (nw=114) (B)
Total Satisfied	66%	69%	80% (A)
Very	27%	28%	36% (AB)
Somewhat	39%	41%	44%
Dissatisfied	30% (C)	27%	16%
Does not sum to 100%; neutral responses excluded			

Frequent Regular Riders and, to a lesser extent, Moderate Regular Riders are more likely than Infrequent Riders to express dissatisfaction with crowding on the bus.

Satisfaction with Overcrowding by Frequency of Riding			
	Frequent Regular (n = 386) (nw=274) (A)	Moderate Regular (n = 201) (nw=146) (B)	Infrequent (n = 97) (nw=248) (B)
Total Satisfied	58%	72% (A)	80% (A)
Very	24%	29%	35%
Somewhat	34%	43%	45%
Dissatisfied	37% (BC)	25% (C)	17%
Does not sum to 100%; neutral responses excluded			

Satisfaction with Comfort / Cleanliness of Bus / Streetcar Interiors					
	2009 (n = 1,417) (nw=1,417) (A)	2010 (n = 1,140) (nw=1,140) (B)	2011 (n = 1,455) (nw=1,455) (C)	2012* (n = 593) (nw=598) (D)	2013* (n = 690) (nw=675) (E)
Inside Cleanliness of Buses					
Total Satisfied	87%	91%	87%▼	89%	90%
Very	41%	40%	40%	47%↑	46%
Somewhat	46%	51%	47%	42%	44%
Availability of Seating					
Total Satisfied	84%	87%	83%▼	83%	84%
Very	40%	42%	42%	40%	47%↑
Somewhat	44%	45%	41%	43%	37%
Overcrowding					
Total Satisfied	67%	68%	64%	64%	69%
Very	24%	23%	25%	23%	29%↑
Somewhat	43%	45%	39%▼	41%	40%
Ease of Getting On and Off the Bus Due to Crowding					
Total Satisfied				77%	87%↑
Very				35%	48%↑
Somewhat				42%	39%
Amount of Lighting					
Total Satisfied					94%
Very					65%
Somewhat					29%

Question M7: Are you satisfied or dissatisfied with each of the following?
Base: Regular and Infrequent Riders
* To minimize length of survey in 2012 and 2013 these questions were asked of half the sample.
↑ = Significant (95%) increase from previous years; ↑ = Significant (90%) increase from previous years
▼ = Significant (95%) decrease from previous years; ▼ = Significant (90%) decrease from previous years

Figure 52: Satisfaction with Comfort / Cleanliness at Stops

While satisfaction with comfort and cleanliness at stops is relatively high, Riders are less satisfied with comfort and cleanliness at stops (overall mean = 4.03) than with comfort and cleanliness on buses and streetcars (overall mean = 4.14).

Riders are most satisfied with the availability of sidewalks, ease of getting on and off the buses or streetcars, and distance from home to stop.

Riders are also generally satisfied with the cleanliness of shelters and stops. While overall satisfaction is unchanged over the years, there has been some variance in the percentage very satisfied.

- After increasing significantly between 2011 and 2012, the percentage very satisfied decreased somewhat in 2013. It remains higher than in years prior to 2012.

Satisfaction with Cleanliness of Shelters / Stops					
	2009 (n = 1,417) (nw=1,417) (A)	2010 (n = 1,140) (nw=1,140) (B)	2011 (n = 1,455) (nw=1,455) (C)	2012 (n = 593) (nw=598) (D)	2013* (n = 690) (nw=675) (E)
Total Satisfied	80%	84%⬆	82%	84%	84%
Very	34%	34%	35%	42%⬆	38%
Somewhat	46%	50%⬆	47%	42%	46%

To minimize length of survey in 2012 and 2013 these questions were asked of half the sample.
⬆ = Significant (95%) increase from previous years; ⬆ = Significant (90%) increase from previous years
⬇ = Significant (95%) decrease from previous years; ⬇ = Significant (90%) decrease from previous years

Riders are less satisfied with the availability of seating and/or shelters at stops as well as the amount of lighting.

Satisfaction with Comfort / Cleanliness at Stops	
2013 (n = 690) (nw=675)	
Availability of Sidewalks	
Total Satisfied	93%
Very	67%
Somewhat	26%
Ease of Getting On / Off Due to Crowding	
Total Satisfied	89%
Very	50%
Somewhat	39%
Distance from Home to Stop	
Total Satisfied	88%
Very	64%
Somewhat	24%
Cleanliness of Shelters / Stops	
Total Satisfied	84%
Very	38%
Somewhat	46%
Availability of Seating at Shelters / Stops	
Total Satisfied	71%
Very	35%
Somewhat	36%
Availability of Shelters at Stops	
Total Satisfied	72%
Very	33%
Somewhat	39%
Amount of Lighting at Shelters / Stops	
Total Satisfied	68%
Very	33%
Somewhat	35%

Question M7: Are you satisfied or dissatisfied with each of the following?
Base: Regular and Infrequent Riders
To minimize length of survey in 2013 these questions were asked of half the sample.

Riders in Seattle / North King and East King County are more satisfied with comfort and cleanliness at bus stops than are those living in South King County.

- This difference is greatest for the amount of lighting at stops followed by cleanliness of stops and shelters.

Riders in Seattle / North King County are more satisfied than those in East and South King County with the distance from home to a bus stop.

Satisfaction with Comfort & Cleanliness at Stops by Area of Residence			
	Seattle / N. King (n = 251) (n$_w$=358) (A)	South King (n = 223) (n$_w$=203) (B)	East King (n = 216) (n$_w$=114) (C)
	Mean (5 = very satisfied; 1 = very dissatisfied")		
Overall	4.10	3.88	4.08
Availability of sidewalks	4.55 (B)	4.34	4.62 (B)
Distance from home to stop	4.49 (BC)	4.28	4.19
Getting on / off due to crowding	4.31 (B)	4.10	4.38 (B)
Cleanliness of stops / shelters	4.10 (B)	3.77	4.26 (B)
Availability of shelters	3.72	3.56	3.78 (b)
Amount of lighting	3.76 (B)	3.35	3.80 (B)
Availability of seating at shelters / stops	3.74	3.75	3.58

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level.

Figure 53: Satisfaction with Drivers

Satisfaction with Metro drivers is very high. The overall mean for this dimension is 4.51, making this the second highest rated dimension (just behind fare payment).

Riders are most satisfied with the safety and competency with which drivers operate the bus and streetcar.

- The percentage very satisfied has been increasing and is at its highest level in five years.

Riders are also highly satisfied with driver courtesy.

- The percentage very satisfied with driver courtesy has been increasing and is at its highest level in five years.

While still very high, satisfaction with the helpfulness of drivers declined slightly. This difference is not statistically significant but should be monitored as there had been steady improvements between 2009 and 2012.

Riders continue to be satisfied with how effectively drivers handle problems or incidents on the bus.

- The percentage very satisfied has increased every year since 2010.

A new attribute was added in 2013 to measure satisfaction with how smoothly drivers start and stop the bus or streetcar. As with all other attributes of Metro drivers, satisfaction with this is high.

Satisfaction with Drivers					
	2009	**2010**	**2011**	**2012***	**2013***
	(n = 1,417)	(n = 1,140)	(n = 1,455)	(n = 622)	(n = 705)
	(n$_w$=1,417)	(n$_w$=1,140)	(n$_w$=1,455)	(n$_w$=620)	(n$_w$=720)
	(A)	(B)	(C)	(D)	(E)
Drivers Operate Bus / Streetcar Safely / Competently					
Total Satisfied	**95%**	95%	96%	96%	95%
Very	69%	71%	71%	73%	77%↑
Somewhat	26%	24%	25%	23%	17%
Driver Courtesy					
Total Satisfied	93%	95%	94%	93%	95%
Very	64%	66%	67%	68%	73%↑
Somewhat	29%	29%	27%	25%	22%
Helpfulness of Drivers					
Total Satisfied	89%	91%	92%	93%	91%
Very	56%	59%	62%↑	66%↑	64%
Somewhat	33%	32%	30%	27%	27%
Drivers' Handling of Incidents on Bus					
Total Satisfied	n.a.	78%	84%↑	88%↑	88%
Very		46%	49%	60%↑	64%↑
Somewhat		32%	35%↑	28%	24%
Drivers Start and Stop Bus / Streetcar Smoothly					
Total Satisfied	n.a.	n.a.	n.a.	n.a	92%
Very					62%
Somewhat					30%

Question M7: Are you satisfied or dissatisfied with each of the following?
Base: Regular and Infrequent Riders
* To minimize length of survey in 2012 and 2013 these questions were asked of half the sample. Total % satisfied may equal more or less than the sum of % very and somewhat satisfied due to rounding.
↑ = Significant (95%) increase from previous years; ↑ = Significant (90%) increase from previous years
↓ = Significant (95%) decrease from previous years; ↓ = Significant (90%) decrease from previous years

Figure 54: Satisfaction with Transferring

Transferring is the lowest rated service dimension (overall mean = 3.86).

Riders (who transfer) continue to be less satisfied with wait time when transferring than with the number of transfers they take.

After decreasing every year since 2009, satisfaction with wait time when transferring increased. Notably, the percent very satisfied with wait time when transferring increased significantly.

The percentage of Riders very satisfied with the number of transfers increased as well.

Satisfaction with Transferring					
	2009	**2010**	**2011**	**2012**	**2013**
	(n = 632)	(n = 476)	(n = 724)	(n = 614)	(n = 710)
	(n_w=623)	(n_w=456)	(n_w=745)	(n_w=601)	(n_w=723)
	(A)	(B)	(C)	(D)	(E)
Number of Transfers					
Total Satisfied	78%	78%	81%	80%	81%
Very	39%	36%	39%	41%	44%⬆
Somewhat	39%	42%	42%	39%	37%
Wait Time When Transferring					
Total Satisfied	77%	75%⬇	73%⬇	70%⬇	74%
Very	27%	24%	24%	27%	35%⬆
Somewhat	50%	51%	49%	43%⬇	38%
Dissatisfied	23%	24%	25%	27%	25%
% Neutral / Dissatisfied with Wait Time When Transferring by Area of Residence					
Seattle / North King	23%	26%	25%	26%	27%
South King	24%	20%	27%⬆	29%⬆	25%
East King	22%	26%	23%	24%	21%

Question M9 / M11: *Are you satisfied or dissatisfied with each of the following?*
Base: *Regular and Infrequent Riders who take one or more transfers*
Total % satisfied may equal more or less than the sum of % very and somewhat satisfied due to rounding.; Neutral responses not included in analysis
⬆ = Significant (95%) increase from previous years; ⬆ = Significant (90%) increase from previous years
⬇ = Significant (95%) decrease from previous years; ⬇ = Significant (90%) decrease from previous years

Figure 55: Satisfaction with Fare Payment Service Characteristics

Riders are generally satisfied with all aspects of fare payment. The overall mean for this dimension is 4.56, the highest mean score of all service dimensions.

- Satisfaction with ease of paying fares increased significantly in 2012 when the downtown Ride Free Area was eliminated and Riders began boarding through the front door of the bus. Satisfaction with this aspect of service remained high in 2013.

- There has been a significant increase in the percentage of Riders who are very satisfied with the value of service for the fare they pay.

- Finally, there has been a significant increase in the percentage very satisfied with the availability of locations to purchase pass or add value to an E-Purse.

Satisfaction with Fare Payment					
	2009 (n = 1,417) (nw=1,417) (A)	2010 (n = 1,140) (nw=1,140) (B)	2011 (n = 1,455) (nw=1455) (C)	2012 (n = 1,218) (nw=1,218) (D)	2013 (n = 1,395) (nw= 1,395) (E)
Ease of Paying Fares					
Total Satisfied		94%	91%↓	96%↑	96%
Very		72%	68%	76%↑	76%
Somewhat		22%	23%	20%	20%
Value of Service for Fare Paid					
Total Satisfied				89%	91%
Very				56%	62%↑
Somewhat				33%	29%
Overall Satisfaction w/ ORCA Card *					
Total Satisfied	91%	96%	96%	97%	97%
Very	65%	80%↑	82%	82%	83%
Somewhat	26%	16%	14%	15%	14%
Ease of Loading Pass on ORCA Card **					
Total Satisfied				90%	90%
Very				69%	68%
Somewhat				21%	22%
Ease of Adding Value to E-Purse ***					
Total Satisfied				93%	93%
Very				64%	71%
Somewhat				29%	22%
Availabilty of Locations to Purchase Pass or Add Value to E-Purse ** / **					
Total Satisfied				78%	85%
Very				41%	61%↑
Somewhat				37%	24%

Question F5: Are you satisfied or dissatisfied with each of the following?
*Base: Regular and Infrequent Riders; * ORCA Users; ** Pass on ORCA Card; *** E-Purse on ORCA Card*
↑ *= Significant (95%) increase from previous years;* ↑ *= Significant (90%) increase from previous years*
↓ *= Significant (95%) decrease from previous years;* ↓ *= Significant (90%) decrease from previous years*

Figure 56: Satisfaction with Safety and Security

Overall satisfaction with different aspects of safety and security is the third lowest rated dimension of service—the overall mean for this dimension is 4.14 (the same as comfort and cleanliness on the bus).

Riders are generally satisfied with safety and security during the day.

- Riders are less satisfied with daytime safety while riding than while waiting. Moreover, the percent very satisfied with daytime safety while riding has been decreasing since 2011 and is at its lowest in the last five years.

Riders are significantly less satisfied with safety and security when it is dark than with daytime safety and security.

- Riders are more concerned with safety while waiting than while riding.

After trending upwards since 2010, Riders' satisfaction with safety in the downtown transit tunnel decreased.

Satisfaction with Safety and Security					
	2009	2010	2011	2012	2013*
	(n = 1,417)	(n = 1,140)	(n = 1,455)	(n = 1,218)	(n = 690)
	(n$_w$=1,417)	(n$_w$=1,140)	(n$_w$=1,455)	(n$_w$=1,218)	(n$_w$= 675)
	(A)	(B)	(C)	(D)	(E)
Daytime Personal Safety—Waiting					
Total Satisfied	96%	96%	94%	94%	94%
Very	68%	70%	68%⬇	63%⬇	63%
Somewhat	28%	26%	26%	31%	31%
Daytime Personal Safety—Riding					
Total Satisfied	92%	91%	91%	92%	90%
Very	54%	54%	58%⬆	54%⬇	51%⬇
Somewhat	38%	37%	33%	38%	39%
Safety in Downtown Transit Tunnel*					
Total Satisfied	n.a.	81%	90%⬆	92%	84%⬇
Very		46%	56%⬆	50%⬇	48%
Somewhat		35%	34%	42%	36%⬇
Safety Riding After Dark**					
Total Satisfied	76%	77%	78%	84%⬆	81%
Very	31%	31%	33%	34%	30%
Somewhat	45%	46%	45%	50%⬆	51%
Safety Waiting After Dark**					
Total Satisfied	71%	72%	73%	79%⬆	76%
Very	25%	29%	28%	29%	31%
Somewhat	46%	43%	45%	50%⬆	45%

Question PS2: Are you satisfied or dissatisfied with each of the following?
Base: Regular and Infrequent Riders
To minimize length of survey in 2013 these questions were asked of half the sample.
* Asked of Riders who use downtown transit tunnel; ** Asked of Riders who ride when it is dark
⬆ = Significant (95%) increase from previous years; ⬆ = Significant (90%) increase from previous years
⬇ = Significant (95%) decrease from previous years; ⬇ = Significant (90%) decrease from previous years

Riders living in East King County and, to a lesser extent, Seattle / North King County are more satisfied with safety and security while riding than are those living in South King County.

While Riders living in East King County are less likely than those in Seattle / North King County to use the downtown transit tunnel, those that do are significantly less satisfied with safety and security in the transit tunnel.

Satisfaction with Safety and Security by Area of Residence		
Seattle / N. King (n = 251) (n_w=358) (A)	South King (n = 223) (n_w=203) (B)	East King (n = 216) (n_w=114) (C)
Mean (5 = very satisfied; 1 = very dissatisfied)		
Overall Mean 4.14 (B)	4.04	4.32 (AB)
Daytime safety waiting 4.51	4.41	4.64 (aB)
Daytime safety riding 4.25	4.22	4 52 (AB)
Safety in transit tunnel 4.25 (bC)	4.05	3.99
Nighttime safety riding 3.87	3.67	4.15 (AB)
Nighttime safety waiting 3.72	3.55	4.11 (AB)

Figure 57: Riders' Satisfaction with Park-and-Ride Lots

Riders who use park-and-ride lots are generally satisfied with the lots (overall mean = 4.20). Parking availability continues to be the greatest problem. There are no differences in satisfaction with parking availability by area of residence.

Riders in East King County are more satisfied with park-and-ride lots than are those living in Seattle / North King and South King County, notably for personal safety but also for facility maintenance and vehicle security.

- Satisfaction with facility maintenance appears to be a greater problem in Seattle / North King County.

Satisfaction with Park-and-Ride Lots by Area of Residence			
	Seattle / N. King (n = 92) (nw= 142) (A)	South King (n = 201) (nw= 185) (B)	East King (n = 295) (nw=156) (C)
Mean *(5 = very satisfied; 1 = very dissatisfied")*			
Overall All Elements	4.09	4.14	4.35 (AB)
Overall Primary Elements*	4.06	4.06	4.26 (AB)
Personal Safety*	4.25	4.23	4.57 (AB)
Vehicle Security*	4.06	4.10	4.33 (a)
Parking Availability *	3.87	3.85	3.87
Facility Maintenance	4.22	4.44	4.64 (A)
Lighting	4.14	4.19	4.37

* Primary elements are those included in all years; facility maintenance and lighting were first included in 2013

Satisfaction with Park-and-Ride Lots					
	2009 (n = 699) (nw=543) (A)	2010 (n = 484) (nw=413) (B)	2011 (n = 531) (nw=389) (C)	2012 (n = 547) (nw=399) (D)	2013 (n = 588) (nw= 483) (E)
Personal Safety at Park-and-Ride Lots*					
Total Satisfied	91%	92%	89%	92%	91%
Very	53%	56%	51%	58%↑	52%
Somewhat	38%	36%	38%	34%	39%
Vehicle Security*					
Total Satisfied	82%	88%↑	84%	87%	88%
Very	33%	42%↑	42%	44%	40%
Somewhat	49%	46%	42%	43%	48%
Availability of Parking*					
Total Satisfied	83%	79%	72%↓	72%	76%
Very	48%	51%	38%↓	42%	45%
Somewhat	35%	28%	34%	30%	30%
Maintenance of Facilities**					
Total Satisfied					93%
Very					62%
Somewhat					31%
Lighting at Park-and-Ride Lot**					
Total Satisfied					86%
Very					54%
Somewhat					32%

Question PR3: Are you satisfied or dissatisfied with each of the following?
*Base: Regular and Infrequent Riders who used park-and-ride lot in past year
**Base: Regular and Infrequent Riders who used park-and-ride lot in past 30 days
Total % satisfied may equal more or less than the sum of % very and somewhat satisfied due to rounding.
↑ = Significant (95%) increase from previous years; ↑ = Significant (90%) increase from previous years
↓ = Significant (95%) decrease from previous years; ↓ = Significant (90%) decrease from previous years

Figure 58: Riders' Satisfaction with Sources of Information

Riders are satisfied with their ability to get information; this is the third highest rated dimension of service, with overall mean rating of 4.32. After decreasing steadily between 2009 and 2011, Rider satisfaction with information improved somewhat in 2013. However, overall satisfaction remains significantly below the peak level in 2009.

- The major contributor to improvements in this area is the ability to get printed timetables.

Overall Satisfaction with Sources of Information				
2009	**2010**	**2011**	**2012**	**2013**
(n = 1,417)	(n = 1,140)	(n = 1,455)	(n = 1,218)	(n = 1,395)
(n_w=1,417)	(n_w=1,140)	(n_w=1,455)	(n_w=1,215)	(n_w= 1,395)
(A)	(B)	(C)	(D)	(E)
Overall Mean for All Elements of Service Contained in this Dimension				
(based on five-point scale where "1" means "very dissatisfied" and "5" means "very satisfied")				
4.46	4.37🔻	4.29🔻	4.29	4.32🔼

Satisfaction with Sources of Information					
	2009	**2010**	**2011**	**2012**	**2013**
	(n = 1,417)	(n = 1,140)	(n = 1,455)	(n = 1,218)	(n = 1,395)
	(n_w=1,417)	(n_w=1,140)	(n_w=1,455)	(n_w=1,218)	(n_w= 1,395)
	(A)	(B)	(C)	(D)	(E)
Overall Ability to Get Information					
Total Satisfied	92%	91%	88%	92%🔼	95%🔼
Very	64%	62%	59%	59%	60%
Somewhat	28%	29%	29%	33%🔼	35%🔼
Metro Online					
Total Satisfied	92%	91%	90%	93%	95%
Very	63%	62%	52%	62%	60%
Somewhat	29%	29%	38%	31%	35%
Ability to Get Current Printed Timetables					
Total Satisfied	92%	85%🔻	83%	88%🔼	89%
Very	67%	55%🔻	54%	49%🔽	52%
Somewhat	25%	31%🔼	29%	39%🔼	37%
Alerts via Email / Text Messages					
Total Satisfied			87%	88%	86%
Very			53%	43%	49%
Somewhat			34%	45%	37%
Accuracy / Reliability of Printed Timetables					
Total Satisfied				85%	87%
Very				46%	44%
Somewhat				39%	43%
Notification of Service Changes					
Total Satisfied				85%	84%
Very				40%	41%
Somewhat				45%	43%
Website Posting of Service Delays or Problems					
Total Satisfied				84%	83%
Very				39%	35%
Somewhat				45%	48%

Question IN3: Are you satisfied or dissatisfied with each of the following?

Total % satisfied may equal more or less than the sum of % very and somewhat satisfied due to rounding.

Base: *Regular and Infrequent Riders; varies by use of different information sources*

🔼 *= Significant (95%) increase from previous years;* 🔼 *= Significant (90%) increase from previous years*

🔻 *= Significant (95%) decrease from previous years;* 🔽 *= Significant (90%) decrease from previous years*

King County METRO

Riders' Perceptions of Safety

In addition to the questions asked about Riders' satisfaction with safety, Riders' were asked about their general perceptions of safety and Metro's efforts in this regard. These questions were first asked in 2012.

Topic	What We Found	Key Stats			What It Means
Perceptions of Safety	Riders generally agree that Metro provides a safe and secure transportation environment. However, the percentage strongly agreeing with this statement decreased significantly in 2013. This downward trend is due to a significant decrease in the percentage of South King County Riders who "strongly agree" with this statement.	**% Strongly Agree Metro Provides Safe & Secure Environment**			Metro should continue its efforts on safety improvements as it is a major factor in Riders' perceptions of Metro and an influencer in Non-Riders' decision to ride. It is also likely to affect Riders' decisions to take incremental trips when they have a choice to ride or drive. There should be a continued focus on partnerships with local communities and supporting police departments in South King County.
			2012	**2013**	
		All Riders	42%	35% ↓	
		Seattle / North King	40%	38%	
		South King	39%	24% ↓	
		East King	49%	44%	
Metro's Efforts	While the majority of Riders agree that Metro is proactive in its efforts to improve safety and security, the level of agreement has decreased significantly since 2013. This is noteworthy among Riders living in Seattle / North King County.	**% Agree Metro is Proactive in Efforts to Improve Safety**			Recent and negative publicity may be affecting rider perceptions of Metro's efforts to improve safety. Use of traditional media and social media may be effective in countering these negative stories with success stories and details about what Metro is doing. Particular focus should be on Riders living in Seattle / North King County.
			2012	**2013**	
		All Riders	73%	66% ↓	
		Seattle / North King	72%	57% ↓	
		South King	78%	81%	
		East King	74%	67%	
Improvements to Safety	Riders' perceptions of whether safety has improved over the past year are decidedly mixed and vary significantly across the county. Despite expressed concerns about safety, Riders in South King County are significantly more likely to say they feel safer riding than they did a year ago.	**% Agree Riders Feel Safer than a Year Ago**			Again, negative publicity about safety events on the bus may be affecting perceptions of safety improvements.
			2012	**2013**	
		All Riders	37%	42%	
		Seattle / North King	33%	30%	
		South King	40%	62% ↑	
		East King	35%	43%	

Figure 59: Extent to Which Riders Avoid Riding Due to Concerns about Safety

Slightly more than one out of five Riders (22%) suggest that they avoid riding Metro due to concerns about safety. This is similar to 2012 when 23 percent of all Riders said they avoid riding due to concerns about safety.

Infrequent Riders are much more likely than Regular Riders to suggest concerns. Regular Riders were somewhat less likely to suggest to they avoid riding in 2013 compared to 2012 (17% compared to 22%, respectively).

Unlike 2012, there are no significant differences by area of residence.

% of Riders Who Avoid Riding Due to Concerns about Safety by Area of Residence			
	Seattle / N. King (n = 251) (n$_w$ = 358) (A)	South King (n = 223) (n$_w$ = 203) (B)	East King (n = 216) (n$_w$ = 114) (C)
All Riders	21%	23%	21%
Regular Riders	17%	20%	10%
Infrequent Riders	28%	29%	39%

Concerns about safety are greater among women.
- Regular Riders who are women are more likely to avoid riding due to concerns about safety. Infrequent Riders' responses do not vary by gender.

% of Riders Avoid Riding Due to Concerns about Safety by Gender		
	Women (n = 353) (n$_w$ = 338) (A)	Men (n = 337) (n$_w$ = 338) (B)
All Riders	27%	17%
Regular Riders	24%	10%
Infrequent Riders	31%	31%

% of All Riders Who Avoid Riding Due to Concerns about Safety

(All Riders: 22%, Regular Riders: 17%, Infrequent Riders: 31%)
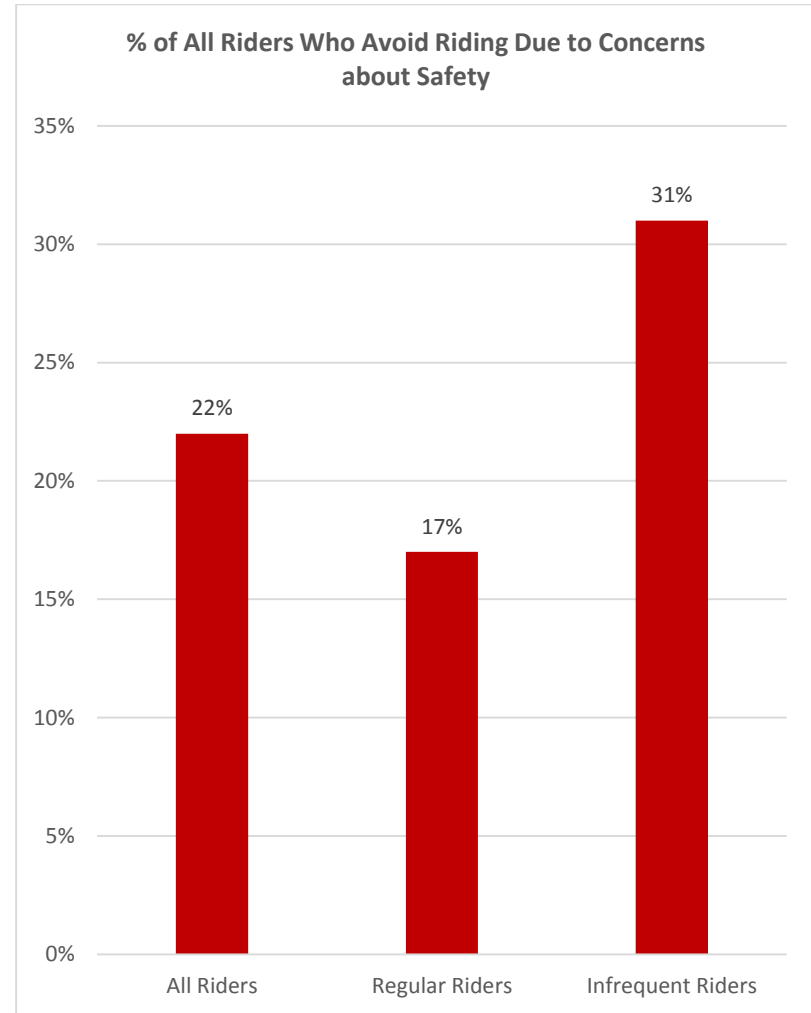
Question PS3A: Do you avoid riding the bus or streetcar due to concerns about your personal safety?

Base: Random selection of Regular and Infrequent Riders: All Riders (n = 690) (n$_w$ = 675); Regular Riders (n = 593) (n$_w$ = 427); Infrequent Riders (n = 97) (n$_w$ = 248)

Figure 60: Riders' Perceptions as to Whether Metro Provides a Safe and Secure Transportation Environment

Nearly all Riders (89%) agree that Metro provides a safe and secure transportation environment.

- While there has been no change in overall agreement with this statement, the percentage who strongly agree decreased significantly since 2012.

- Riders living in South King County are less likely to strongly agree with this statement in 2013 than in 2012. Instead they are more likely to just somewhat agree.

Changes in Perceptions as to Whether Metro Provides a Safe and Secure Transportation Environment by Area of Residence						
	Seattle / N. King		**South King**		**East King**	
	2012 (n=689) (nw=771) (A)	**2013** (n=305) (nw=350) (B)	**2012** (n=210) (nw=237) (C)	**2013** (n=185) (nw=203) (D)	**2012** (n=398) (nw=210) (E)	**2013** (n=211) (nw=114) (F)
Strongly Agree	40%	38%	39% (D)	24%	49%	44%
Somewhat Agree	50%	49%	50%	67% (C)	44%	45%
Neutral	2%	3%	3%	2%	2%	1%
Disagree	8%	10%	8%	7%	5%	11%
Columns may sum to more or less than 100% due to rounding.						

Perceptions as to Whether Metro Provides a Safe and Secure Transportaion Environment
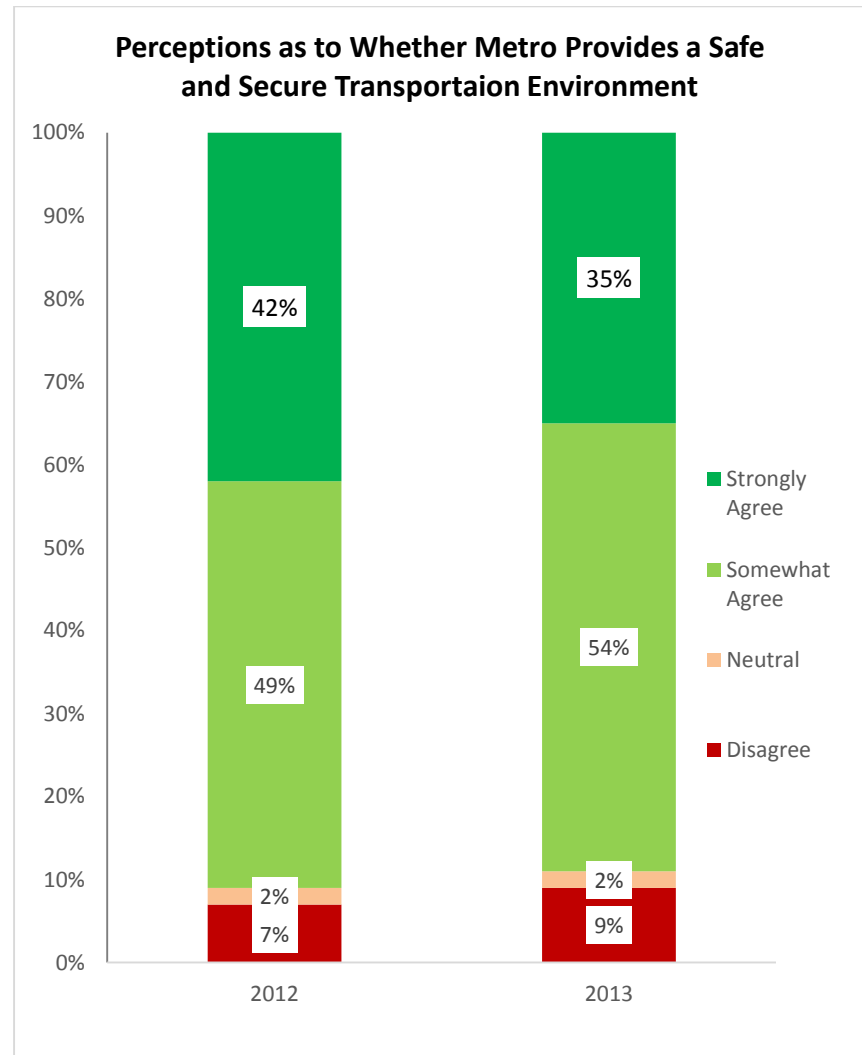
Question PS5G: Do you agree or disagree with the statement: Metro provides a safe and secure transportation environment?
Base 2012: *Regular and Infrequent Riders; All Riders (n = 1,218) (nw = 1,218)*
Base 2013: *Random selection of Regular and Infrequent Riders; All Riders (n = 690) (nw = 675)*

Figure 61: Riders' Perceptions as to Whether Safety has Improved

Riders' perceptions of whether safety has improved over the past year are decidedly mixed. More than two out of five (42%) of all Riders agree that they feel safer riding than they did a year ago. However, one out of three (34%) disagree, and a significant number (24%) have mixed feelings. Views vary significantly by area of residence.

- South King County Riders are significantly more likely than Seattle / North King and, to a lesser extent, East King County Riders to say that they feel significantly safer than they did a year ago. Moreover, there has been a year-over-year change in the percentage of South King County Riders who say they feel safer (62% in 2013 compared with 50% in 2012).

- Seattle / North King County Riders are the least likely to agree that they feel safer. Moreover, in 2013 Seattle / North King County Riders are more likely to strongly disagree that they feel safer than they did in 2012 (15% compared to 8%, respectively).

Riders' Perceptions as to Whether Safety Has Improved Overall and by Area of Residence
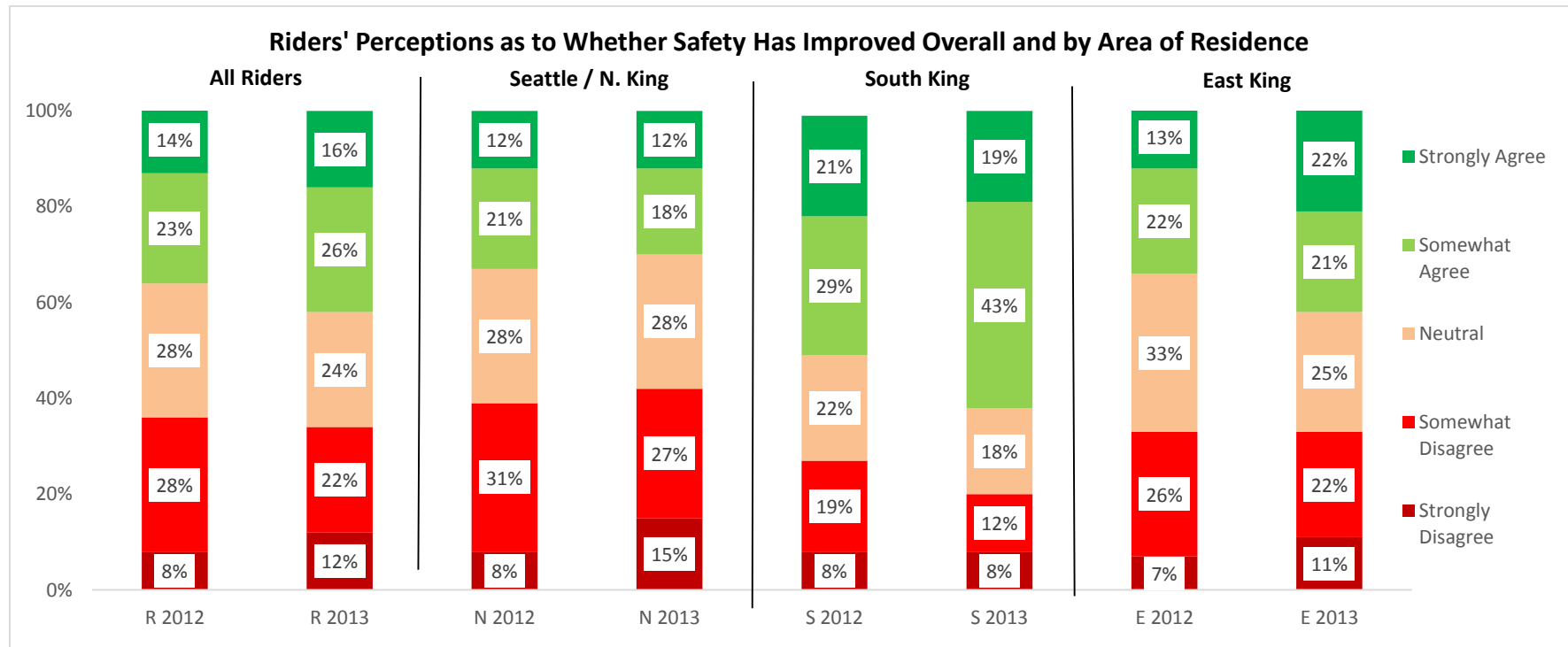
Question PS5A: Do you agree or disagree with the statement: I feel significantly safer riding Metro now than I did a year ago?

Columns may sum to more or less than 100% due to rounding.

Base 2012: *All Riders (n = 1,218) (n$_w$ = 1,218); Seattle / N. King (n = 418) (n$_w$ = 771); South King (n =400) (n$_w$ = 237); East King (n =400) (n$_w$ = 210)*

Base 2013: *Random selection of All Riders (n = 690) (n$_w$ = 675); Seattle / N. King (n = 251) (n$_w$ = 358); South King (n =223) (n$_w$ = 203;) East King (n =216) (n$_w$ = 114)*

Figure 62: Riders' Perceptions as to Whether Metro is Proactive in its Efforts to Improve Safety and Security

The majority of Riders feel that Metro has been very proactive in its efforts to improve safety and security. However, the percentage agreeing with this statement decreased significantly from 2012—74 percent agreed in 2012 while just 66 percent agreed in 2013.

- This change is almost entirely due to changing perceptions among Seattle / North King County Riders. In 2012, 72 percent of Seattle / North King County residents agreed with this statement. This figure dropped to 57 percent in 2013. The percentage who disagree increased correspondingly—from 15 to 25 percent. The percentage with no opinion also increased.
- The percentage of East King County Riders disagreeing with this statement also increased—from 12 to 21 percent.

Riders' Perceptions as to Whether Metro is Proactive in Safety Efforts Overall and by Area of Residence
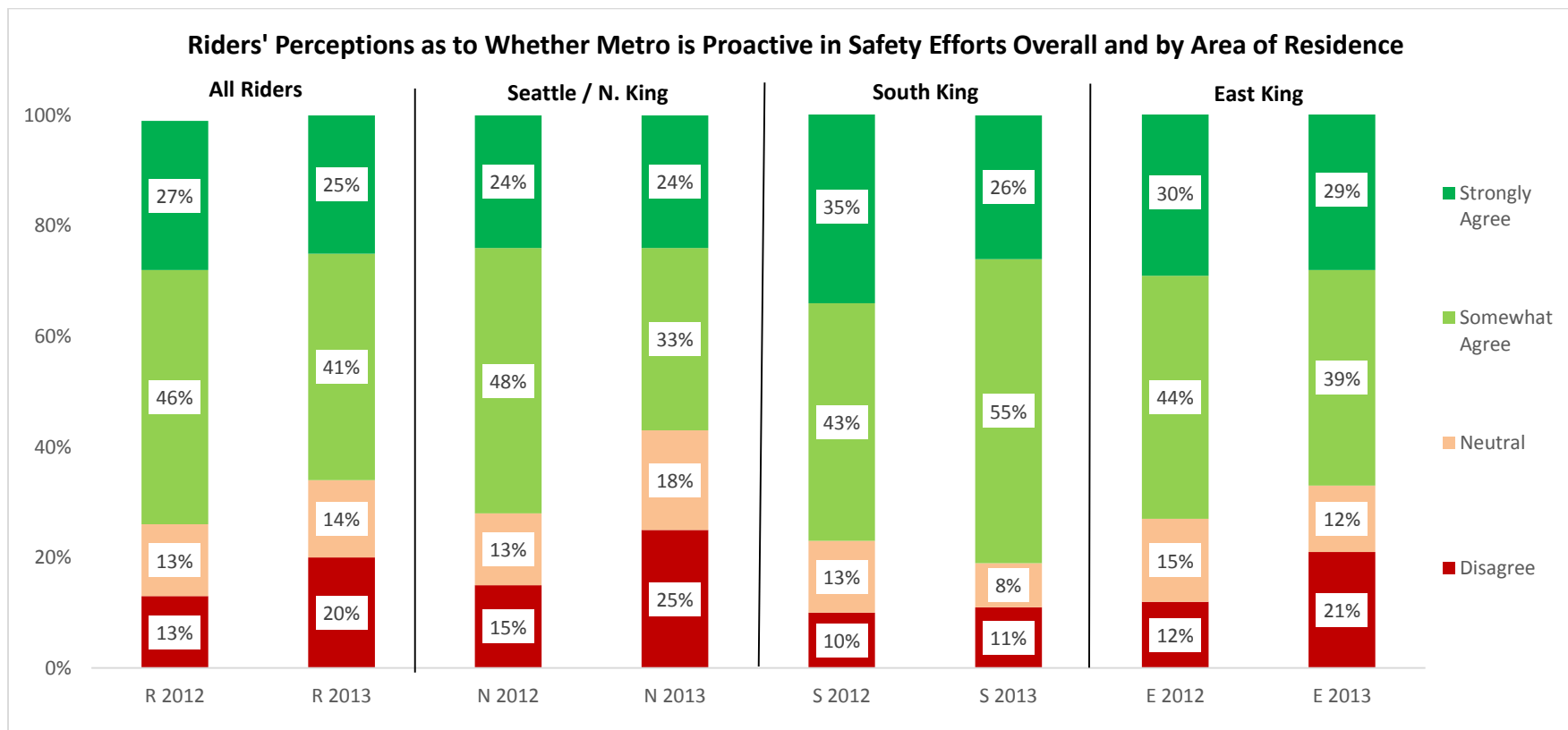
Question PS5B: Do you agree or disagree with the statement: Metro has been very proactive in improving safety and security?

Columns may sum to more or less than 100% due to rounding.

Base 2012: *All Riders (n = 1,218) (n_w = 1,218); Seattle / N. King (n = 418) (n_w = 771); South King (n =400) (n_w = 237); East King (n =400) (n_w = 210)*

Base 2013: *Random selection of All Riders (n = 690) (n_w = 675); Seattle / N. King (n = 251) (n_w = 358); South King (n =223) (n_w = 203;) East King (n =216) (n_w = 114)*

DETAILED FINDINGS—COMMUTERS

Commuters are defined as those who work or attend school outside the home at least three days a week. For analytical purposes, commuters are divided into the following two groups:

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

- School Commuters include those who only attend school and those who attend school more days than they work.

Topic	What We Found	Key Stats			What It Means
Commute Status	The percentage of King County residents who work outside the home at least three days per week has been increasing steadily. The growth in work commuters is greatest in Seattle / North King County. Two out of three Regular Riders are work commuters.	**2009**	**2011**	**2013**	The strong local economy is reflected in the growth in King County residents who commute to work. Work commuters continue to be Metro's core customer base.
		Total Commuters			
		59%	61% ⬆	63% ⬆	
		Work Commuters			
		53%	55% ⬆	57% ⬆	
		School Commuters			
		6%	6%	6%	
		Non-Commuters			
		41%	39%	37%	
Commute Mode	Slightly less than three out of five commuters drive alone to work. This is the lowest percentage ever. Use of Metro increased significantly among commuters living in Seattle / North King and South King County. While there has been a significant increase in the percentage of East King County residents who are commuters, there has been little change in the percentage of commuters using Metro.	**2009**	**2011**	**2013**	Much of Metro's ridership growth over the past two years can be clearly attributed to growth in the number of commuters and the percentage of commuters using Metro. Lack of large employment centers in East King County (beyond downtown Bellevue) likely discourages use of Metro. In addition, many worksites in East King County have large parking lots. The focus should be on encouraging transit use among East King County residents who commute to downtown Seattle or Bellevue.
		Single-Occupant Vehicle (SOV)			
		65%	63% ⬇	59% ⬇	
		Metro Bus—Countywide			
		16%	16%	24% ⬆	
		Metro Bus—Seattle / North King			
		26%	26%	35% ⬆	
		Metro Bus—South King			
		8%	10%	21% ⬆	
		Metro Bus—East King			
		10%	9%	12%	
		Trends based on years when both Riders and Non-Riders are surveyed.			

Topic	What We Found	Key Stats	What It Means
Work Location	The percentage of commuters working in downtown Seattle increased significantly between 2011 and 2013. This is due to the growth in the areas immediately surrounding downtown—11 percent in 2009 to 16 percent in 2011 and 2013. The percentage of commuters working in the other two major central destinations—University of Washington and Downtown Bellevue—has remained stable over the years. Commuters working at UW and in downtown Seattle are major users of Metro—52 percent of those working in the downtown Seattle core, 29 percent working the areas immediately surrounding downtown (41% downtown Seattle overall), and 45 percent of those working at or near the UW use Metro.	**2009** / **2011** / **2013** **Downtown Seattle*** **% of All Commuters** 28% / 26% / 33% **% of Metro Bus Commuters** 36% / 36% / 41% **University of Washington** **% of All Commuters** 5% / 5% / 7% **% of Metro Bus Commuters** 37% / 39% / 45% **Downtown Bellevue** **% of all Commuters** 7% / 7% / 8% **% of Metro Bus Commuters** 11% / 8% / 16% *Trends based on years when both Riders and Non-Riders are surveyed.* ** Includes downtown core and the immediately surrounding areas.*	Metro's core market are commuters—notably those working in downtown Seattle. While fewer commuters travel to the University of Washington (campus and surrounding district), a significant percentage use Metro and represent another core market for Metro. The increase in commuters working in downtown Bellevue who use Metro should be monitored to determine if this is the start of real growth in this market.
Travel Time / Distance to Work	After remaining relatively stable over the years, commuters' trips are now longer—both in terms of distance and travel times. Distance to work has not changed among single-occupant vehicle (SOV) Commuters; travel time has increased significantly. Both distance and travel times have increased for Metro commuters.	**2009** / **2011** / **2013** **Distance (in miles)** 11.5 / 11.3 / 14.7 **SOV Commuters** 12.2 / 12.2 / 12.0 **Metro Bus Commuters** 10.4 / 10.1 / 11.5 **Travel Time (in Minutes)** 26.5 / 26.9 / 30.9 **SOV Commuters** 23.8 / 24.5 / 27.0 **Metro Bus Commuters** 36.0 / 38.6 / 43.5 *Trends based on years when both Riders and Non-Riders are surveyed.*	Increase in travel time for SOV commuters is almost entirely due to increased congestion. Increase in travel times for Metro bus commuters is a combination of longer trips (in terms of distance) as well as increased congestion. The significant difference in travel times by bus versus cars continues to be a likely deterrent to transit use. Moreover, the fact that trip length (both distance and time) for bus commuters has increased could create an even greater barrier to using Metro to get to work.

King County METRO

Topic	What We Found	Key Stats	What It Means
Parking	Nearly three out of five drive-alone commuters park in a free lot affiliated with their worksite. An additional 13 percent have free parking available on a street nearby. Seven out of ten drive-alone commuters who work in downtown Seattle pay for parking—in a garage (49%), a surface lot (2%), or on the street (19%). Nearly seven out of ten drive-alone commuters who park in a garage or lot receive a full or partial subsidy for parking; most receive a full subsidy.	See table below	The availability of free or heavily subsidized parking continues to be a likely deterrent to transit use. As noted elsewhere in this report, employers are increasingly less likely to subsidize transit passes or an E-Purse. At the same time, employers in far-flung worksites must offer parking to their employees.

Key Stats (Parking):

		Work Location	
	All Drive Alone	**DT Seattle Core**	**All Other**
Surface Lot	63%	21%	**71%**
Free	57%	19%	**61%**
Paid	9%	2%	10%
On Street	16%	26%	15%
Free	13%	7%	16%
Paid	3%	19%	2%
Garage	9%	**49%**	12%
Other	3%	4%	2%

Bold indicates significant difference from adjacent column

Topic	What We Found	Key Stats	What It Means
Potential Ridership	More than two out of five (42%) SOV commuters say that the idea of using Metro to commute is at least somewhat appealing. An additional 24 percent say it is neither appealing nor unappealing. Three out of ten (31%) of all SOV commuters suggest they would be at least somewhat likely to use Metro to commute if service was available; 18 percent suggest they would be very likely.	See table below	There is significant potential to grow Metro's core market—Commuters—if there was convenient service linking them from their home to where they work.

Key Stats (Potential Ridership):

All SOV Commuters

Appeal of Using Metro for Commuting

Appeal		Total % Appealing
Very	17%	
Somewhat	25%	42%
Not Very	24%	
Not at All	35%	

Likelihood of Using Metro for Commuting

Stated Likelihood		Total % Likely
Very	18%	
Somewhat	13%	31%
Not Very	10%	
Not at All	59%	

King County METRO

COMMUTER STATUS

Figure 63: Commuter Status (All Respondents)

The percentage of those commuting has increased significantly since 2009, due entirely to an increase in the percentage of Work Commuters.

- The increase in commuters is greatest in Seattle / North King County.

- The percentage of commuters living in South King County has changed little over the years.

% of Commuters by Area of Residence			
	2009	**2011**	**2013**
Total Commuters			
Seattle / North King	58%	65%	68%
South King	62%	57%	59%
East King	57%	62%	64%
Work Commuters			
Seattle / North King	51%	59%	62%
South King	56%	50%	52%
East King	51%	57%	59%
Base: All Respondents, see page 214 for table of base sizes			

All Respondents--Riders & Non-Riders

	2009	2011	2013
% Total Commuters	59%	61%	63%
% Work Commuters	53%	55%	57%
% School Commuters	6%	6%	6%
% Non-Commuters	41%	39%	37%
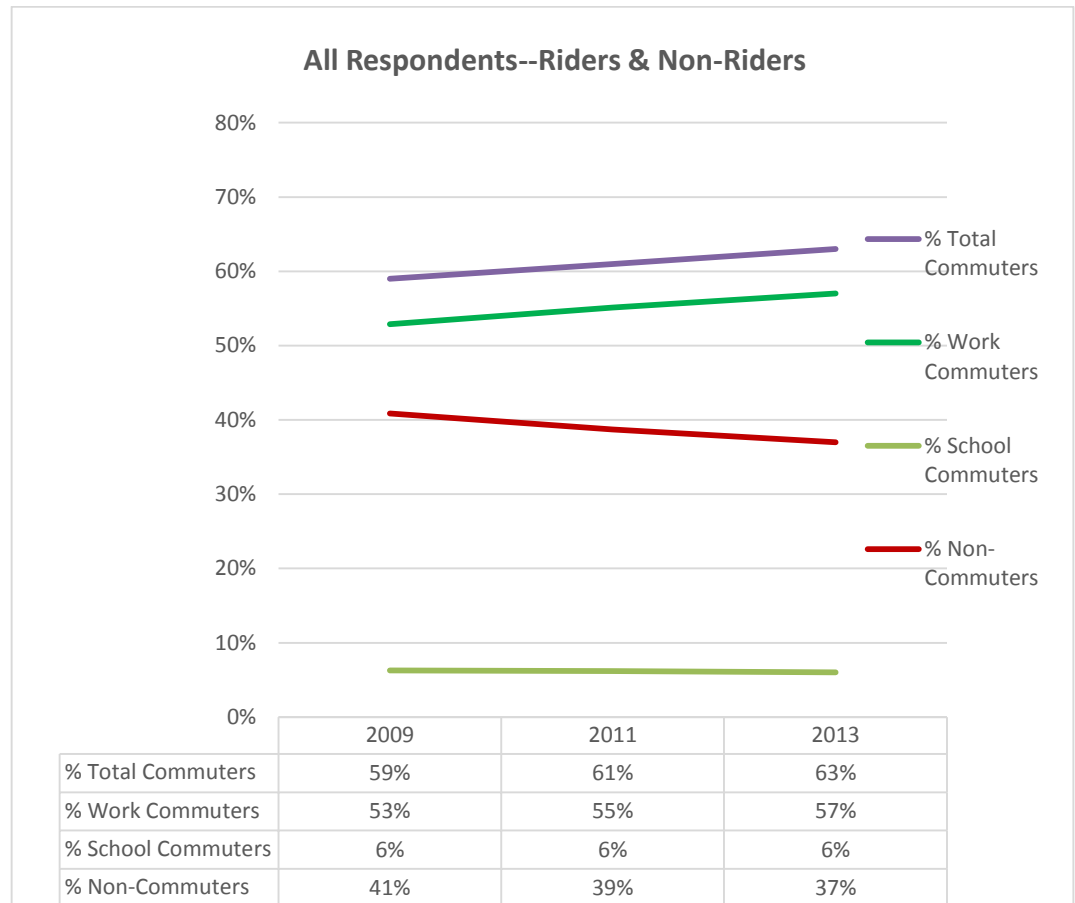
COMMUTER—*Computed variable based on **GEN3**: How many days a week do you [work/attend school] outside the home?*

Base: *All respondents: 2009 (n = 2,425) (nw=2,425); 2011 (n = 2,421) (nw=2,421): 2013 (n = 2,414) (nw=2,414)*

* Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2010 and 2012.

Figure 64: Commuter Status

The percentage of commuters continues to be significantly higher among Riders (71%) than among Non-Riders (59%).

- Moreover, the percentage of commuters is higher among Regular Riders (78%) than among Infrequent Riders (59%).

The percentage of Regular Riders who are commuters has increased significantly from its low point in 2009.

- The percentage of Regular Riders who are commuters currently stands at 78 percent, with the percentage who are Work Commuters (67%) standing at its highest in years.
- Nearly three out of four (74%) Frequent Regular Riders are Work Commuters; an additional 11 percent commute to school.

Columns in table may sum to more or less than 100% due to rounding.; % of work and school commuters may sum to more or less than all commuters due to rounding.

Commuter Status by Rider Status					
All Riders					
	2009 (n=1,417) (nw=712) (A)	**2010** (n=1,140) (nw=1,140) (B)	**2011** (n=1,455) (nw=693) (C)	**2012** (n=1,218) (nw=1,218) (D)	**2013** (n=1,395) (nw=892) (E)
All Commuters	68%	71%	70%	70%	71%
Work	57%	59%	59%	58%	61%
School	11%	12%	11%	12%	10%
Non-Commuters	32%	29%	30%	30%	29%
Regular Riders					
	2009 (n=1,219) (nw=444)	**2010** (n=830) (nw=650)	**2011** (n=1,241) (nw=443)	**2012** (n=831) (nw=772)	**2013** (n=1,207) (nw=567)
All Commuters	71%	79% (Ac)	74%	76% (A)	78% (A)
Work	59%	64% (A)	64% (A)	62%	67% (A)
School	12%	15% (CE)	11%	14% (c)	11%
Non-Commuters	29% (BDE)	21%	26% (b)	24%	22%
Infrequent Riders					
	2009 (n=198) (nw=268)	**2010** (n=310) (nw=490)	**2011** (n=214) (nw=250)	**2012** (n=387) (nw=446)	**2013** (n=188) (nw=324)
All Commuters	63%	60%	61%	60%	59%
Work	55%	53%	50%	51%	51%
School	8%	7%	11%	9%	8%
Non-Commuters	38%	40%	38%	40%	41%

Non-Riders			
	2009 (n=1,008)(nw=1,713)	**2011** (n=1,066)(nw=1,828)	**2013** (n=1,019)(nw=1,522)
All Commuters	56%	58%	59%
Work	51%	54%	55% (a)
School	5%	4%	4%
Non-Commuters	44%	42%	41%

King County METRO

COMMUTER DEMOGRAPHIC CHARACTERISTICS

Figure 65: Commuter and Non-Commuter Demographics

Work Commuters:

- Four out of five are employed full time.

- Nine percent (9%) are self-employed but commute to a work site outside their home.

- Work Commuters are more likely to be men than women.

- Nearly half are between the ages of 35 and 54.

- This is the most affluent segment.

Student Commuters:

- The vast majority (87%) do not work.

- Student Commuters are more likely to be men than women.

- The vast majority (95%) are under the age of 35: 31 percent 16–17, 25 percent 18–19, 29 percent 20–24, 11 percent 25–34.

- This is the most diverse segment.

	Commuter Status			
	All Commuters (n=1,494) (n_w=1,531) (A)	**Work Commuters** (n=1,317) (n_w=1,383) (B)	**School Commuters** (n=177) (n_w=148) (C)	**Non-Commuters** (n=920) (n_w=883) (D)
Employment Status				
Full-Time	71%	79%	0%	7%
Part-Time	10%	11%	0%	3%
Self-Employed	8%	9%	<1%	10%
Student / Not Working	8%		87%	2%
Student / Working	3%	2%	12%	<1%
Not Employed Outside Home				8%
Retired				51%
Unemployed / Other				19%
Gender				
Male	56% (D)	55% (D)	64% (D)	41%
Female	44%	45%	36%	60% (ABC)
Age				
16–17	3%	<1%	31% (BD)	1%
18–34	33%	30%	64% (BD)	12%
35–54	43%	47% (BC)	4%	25% (B)
55 plus	21%	23%	<1%	62% (ABC)
Mean	40.1	43.0 (C)	20.9	57.5 (ABC)

Columns may sum to more or less than 100% due to rounding.

Non-Commuters:

- More than half are retired.

- More than one out of five work or go to school but do so less than three times a week (outside the home).

- Non-Commuters are more likely to be women than men.

- More than three out of five are 55 and older; 42 percent are 65 and older.

  o Non-Commuters who are not employed are older (avg. age = 60.0) than those who are employed (avg. age = 48.6).

- This segment is less affluent than Commuters, but this varies significantly based on whether they are employed.

  o Non-Commuters who are employed are more affluent (median income = $79,467) than those who are not employed (median income = $49,872).

	All Commuters (n=1,494) (n$_w$=1,531) (A)	Work Commuters (n=1,317) (n$_w$=1,383) (B)	School Commuters (n=177) (n$_w$=148) (C)	Non-Commuters (n=920) (n$_w$=883) (D)
Income				
Less than $35K	16%	14%	35% (B)	37% (BA)
$35K–<$55K	17%	17%	15%	15%
$55K–<$75K	18%	18%	18%	15%
$75K–<$100K	16%	16%	14%	12%
$100K–<$150K	15% (d)	15% (D)	12%	11%
$150K or more	18% (D)	20% (CD)	6%	10%
Median	$75,394	$77,732	$56,885	$56,098
Household Composition				
Single-Person	25%	26% (C)	13%	30% (AbC)
Multi-Person	75%	74%	87%	70%
Average Household Size	2.2	2.1	3.1	2.0
Race /Ethnicity				
White	74%	77%	53%	82%
Black	5%	5%	8%	4%
Asian	12%	10%	30%	4%
Amer. Indian /Alaska Native	2%	2%	2%	4%
Hispanic	6%	6%	4%	4%
Mixed Race	1%	1%	3%	2%
Access to Vehicle(s)				
% w/ Driver's License	94%	96%	70%	90%
% w/ Vehicle	96%	97%	90%	91%
# of Vehicles	2.1	2.1	2.3	1.9

Columns in table may sum to more or less than 100% due to rounding.

King County METRO

COMMUTER TRANSIT USE

Figure 66: Commuters' Transit Use

Work Commuters:
- Distribution of Riders and Non-Riders is generally in line with the general population.
- If they ride, three out of four say their primary trip is to get to and from work.
  - One out of four ride Metro primarily for non-commute trips.

Student Commuters:
- This is the segment most likely to be Regular Riders.
- If they ride, this is the segment most likely to rely on Metro for all or most of their transportation needs.

Non-Commuters:
- This is the segment least likely to be Riders.
- If they ride, this is the segment least likely to rely on Metro for their transportation.

	Commuter Status			
	All Commuters (n=1,494) (n$_w$=1,531) (A)	Work Commuters (n=1,317) (n$_w$=1,383) (B)	School Commuters (n=177) (n$_w$=148) (C)	Non-Commuters (n=920) (n$_w$=883) (D)
Rider Status				
Regular Rider	29%	27% (D)	43% (BD)	14%
Infrequent Riders	13%	12%	17%	15% (ab)
Non-Rider	59%	61% (C)	40%	71% (ABC)
Length of Time Riding (Riders)				
New Rider	14% (D)	13% (d)	21% (D)	8%
Experience Riders	86%	87%	79%	92% (AbC)

	Commuter Status			
	All Commuters (A)	Work Commuters (B)	School Commuters (C)	Non-Commuters (D)
Frequency of Riding (Riders)				
1–4 Rides	30%	31%	29%	52% (ABC)
5–10 Rides	20%	19%	23%	27% (b)
11–20 Rides	17% (D)	18% (D)	12%	8%
21+ Rides	33% (D)	32% (D)	36% (D)	12%
Average	18.7 (D)	18.3 (D)	21.3 (bD)	10.8
Reliance on Transit (Riders)				
All / Most	38%	37%	47%(d)	32%
All	6%	5%	14% (B)	10% (b)
Most	32%	32%	33%	21%
Some	35%	36%	30%	31%
Very Little	27%	27%	22%	38% (ABC)
Trip Purpose (Riders)				
To / From Work	66% (D)	75% (CD)	14%	16%
To / From School	10%	1%	63% (BD)	4%
Non-Commute	24%	24%	24%	80% (ABC)
Times Ride (Riders)				
Peak and Off-Peak	74%	74%	80%	73%
Peak Only	12% (D)	13% (cD)	6%	5%
Off-Peak Only	14%	13%	15%	22% (AB)

Columns may sum to more or less than 100% due to rounding. % all and most may not sum to total % all or most due to rounding.

COMMUTER COMMUTE MODE

Figure 67: Primary Travel Mode to Work or School

The number of commuters who drive alone to travel to work has decreased steadily from 2009. Currently slightly less than three out of five (59%) commuters drive alone to work.

More than one out of four commuters use public transportation, up significantly from 2009 and 2011.

Primary Travel Mode to Work or School

	2009	2011	2013
Single Occupant Vehicle	65%	63%	59%
Metro Bus	16%	16%	24%
Other Transit	2%	3%	2%
Carpool / Vanpool	8%	8%	8%
Other	9%	10%	7%
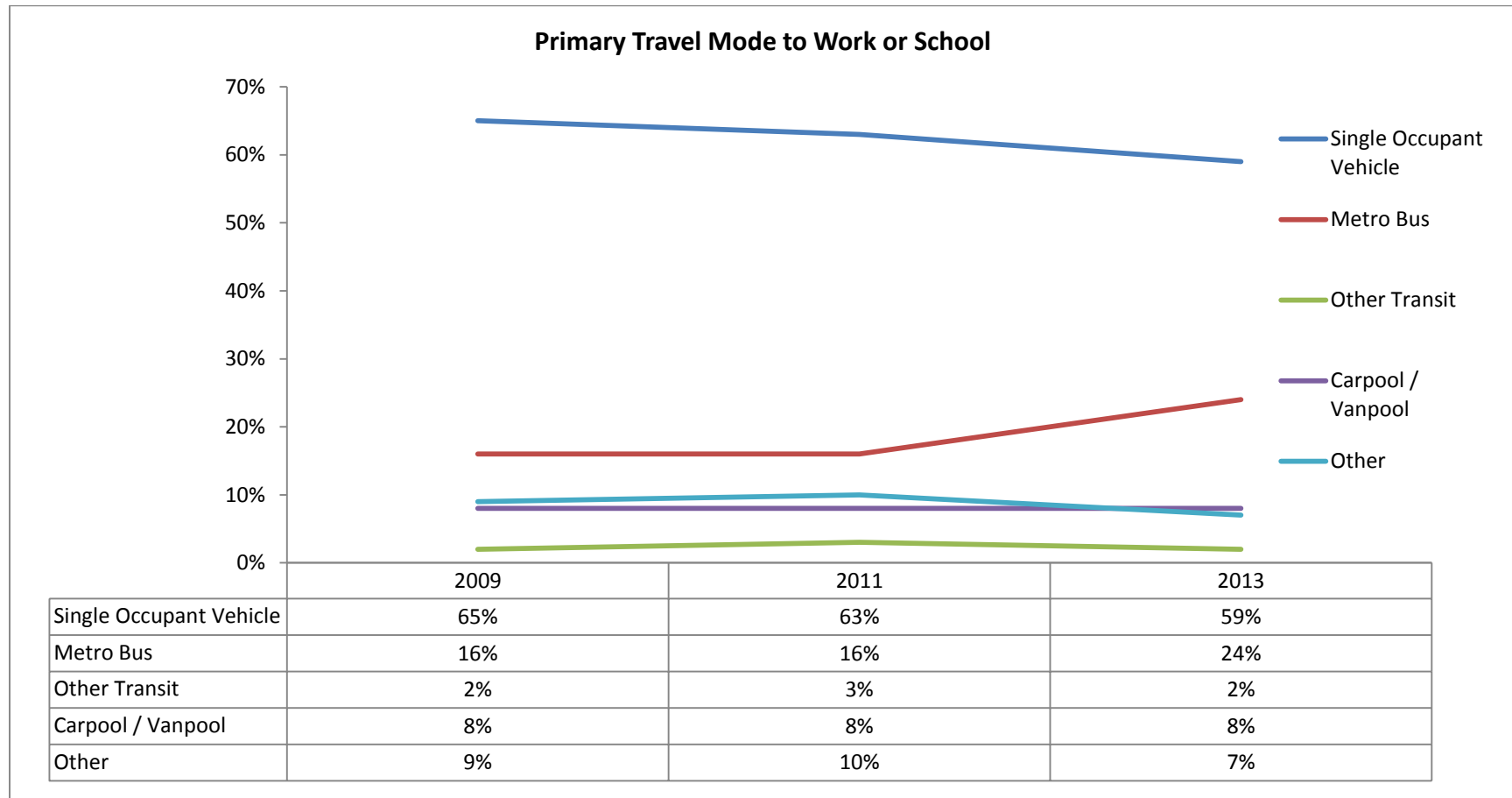
Question C2B: How do you usually get to work or school?

Base: *Commuters 2009 (n = 1,545) (n$_w$ = 1,434); 2011 (n = 1,627) (n$_w$ = 1,546); 2013 (n = 1,494) (n$_w$ = 1,531)*

Years 2010 and 2012 excluded from analysis as only Riders were surveyed.

Figure 68: Primary Travel Mode to Work or School by Commuter Status and Area of Residence

As in previous years, Work Commuters are twice as likely as School Commuters to drive alone.

- The decrease in single-occupant vehicle (SOV) commuters between 2011 and 2013 is significant among Work Commuters.

As in previous years, commuters in Seattle / North King County are significantly more likely than those in East and, to a lesser extent, South King County to use Metro.

- Use of Metro to commute has increased significantly in Seattle / North and South King County. Increased use of Metro to commute is a likely contributor to the increase in market share in South King County.

Primary Travel Mode to Work or School by Commuter Status			
Work Commuters			
	2009	**2011**	**2013**
	(n=1,331)(n$_w$=1,282)	(n=1,416)(n$_w$=1,390)	(n=1,317)(n$_w$=1,383)
	(A)	(B)	(C)
SOV	69%	67%	63%
	(C)	(C)	
Metro Bus	14%	15%	22%
			(AB)
Other Transit	2%	3%	1%
Car / Vanpool	7%	7%	8%
Other	8%	9%	6%
School Commuters			
	2009	**2011**	**2013**
	(n=214)(n$_w$=152)	(n=211)(n$_w$=156)	(n=177)(n$_w$=148)
	(A)	(B)	(C)
SOV	29%	31%	31%
Metro Bus	28%	26%	39%
Other Transit	1%	3%	3%
Car / Vanpool	20%	13%	9%
Other	22%	27%	18%
Columns in tables may sum to more or less than 100% due to rounding.			

Primary Travel Mode to Work or School by Area of Residence			
Seattle / N. King			
	2009	**2011**	**2013**
	(n=502)(n$_w$=557)	(n=530)(n$_w$=591)	(n=481)(n$_w$=557)
	(A)	(B)	(C)
SOV	50%	50%	47%
Metro Bus	26%	26%	35%
			(AB)
Other Transit	2%	2%	1%
Car / Vanpool	6%	7%	6%
Other	15%	15%	12%
South King			
	2009	**2011**	**2013**
	(n=527)(n$_w$=513)	(n=522)(n$_w$=528)	(n=478)(n$_w$=541)
SOV	75%	71%	64%
	(C)		
Metro Bus	9%	10%	21%
			(AB)
Other Transit	2%	4%	2%
Car / Vanpool	10%	9%	10%
Other	4%	7%	3%
East King			
	2009	**2011**	**2013**
	(n=516)(n$_w$=365)	(n=575)(n$_w$=427)	(n=535)(n$_w$=434)
SOV	73%	72%	70%
Metro Bus	10%	9%	12%
Other Transit	1%	2%	1%
Car / Vanpool	9%	8%	9%
Other	7%	8%	7%

King County METRO

Figure 69: Primary Travel Mode to Work or School by Rider Status

Three out of four Regular Riders use Metro for their commute trips, up significantly from two out of three in 2009 and 2011.

- One out of eight (12%) Metro Regular Riders drive alone to work, the same as in prior years.
- The percentage of Metro Regular Riders using another transit system to travel to work decreased, as did the percentage carpooling and walking (included in "other").

Primary Travel Mode to Work or School by Rider Status			
Regular Riders			
	2009	**2011**	**2013**
	(n=863)(nw=315)	(n=908)(nw=330)	(n=850)(nw=441)
	(A)	(B)	(C)
SOV	10%	11%	12%
Metro Bus	67%	66%	75%
			(AB)
Other Transit	4%	7%	2%
		(AC)	
Car / Vanpool	4%	7%	4%
		(aC)	
Other	15%	10%	7%
	(BC)	(c)	
Infrequent Riders			
	2009	**2011**	**2013**
	(n=123)(nw=167)	(n=125)(nw=154)	(n=96)(nw=191)
SOV	61%	55%	64%
Metro Bus	10%	8%	9%
Other Transit	3%	2%	1%
Car / Vanpool	13%	11%	15%
Other	14%	24%	12%
Non-Riders			
	2009	**2011**	**2013**
	(n=559)(nw=952)	(n=597)(nw=1,062)	(n=548)(nw=898)
East King			
SOV	84%	81%	82%
Metro Bus	<1%	1%	1%
Other Transit	1%	1%	1%
Car / Vanpool	9%	8%	9%
Other	6%	9%	7%
Columns may sum to more or less than 100% due to rounding.			

COMMUTER WORK LOCATION

Figure 70: Work Location

The percentage of commuters working in downtown Seattle increased significantly in 2013. This is due to growth in the areas surrounding the downtown Seattle core—from 11 percent in 2009 to 16 percent in 2011 and 2013. In addition, the percentage working in the downtown Seattle core nearly doubled between 2011 and 2013 (from 10% to 17%), returning to 2009 levels.

There has also been growth in the percentage of commuters traveling to the U-District or the UW Campus and decreases in the percentage working in other North and South King County locations.
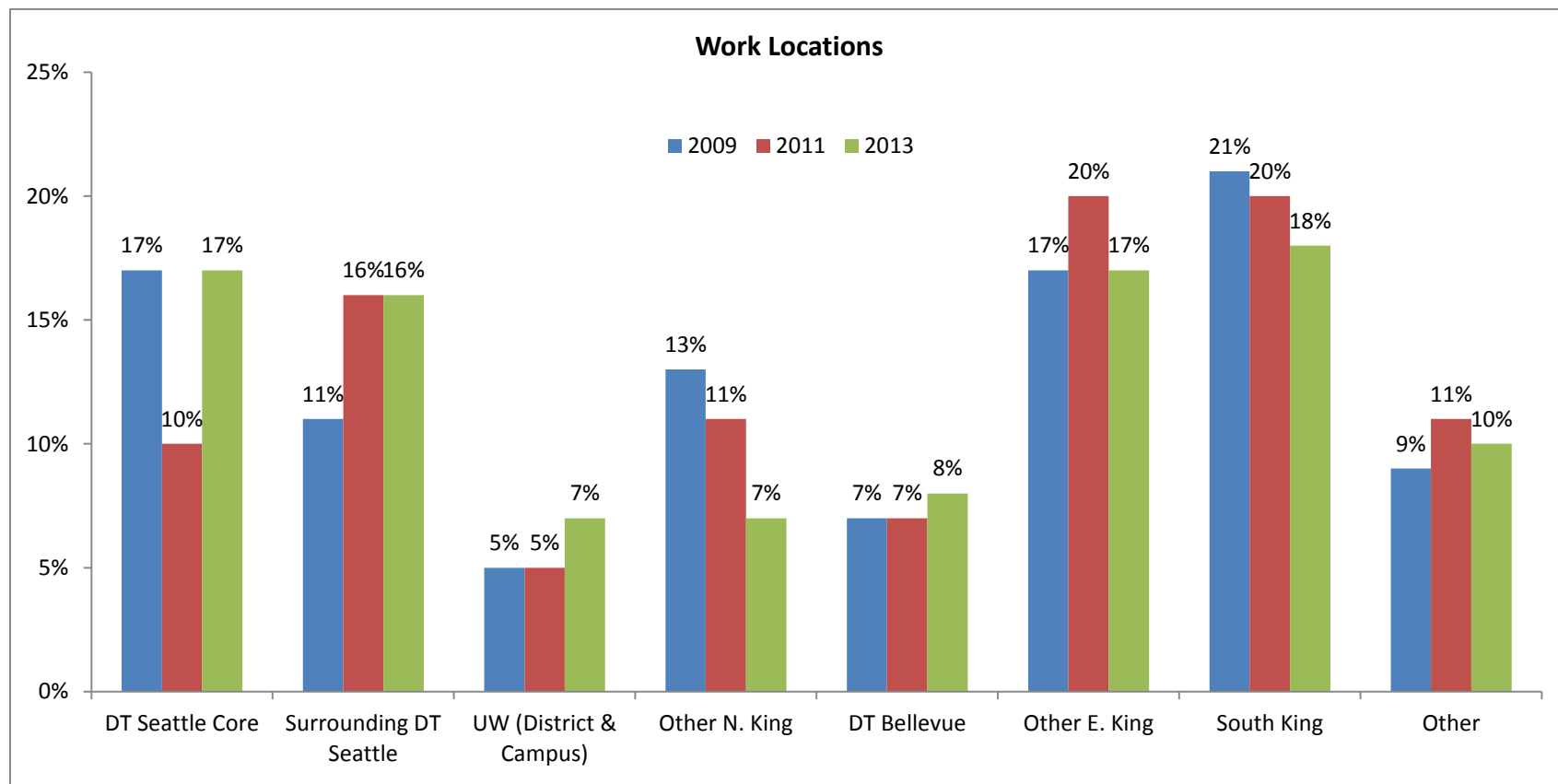
Question C1: In what geographic area do you [work/attend school]?

Base: All Work or School Commuters, 2009 (n=1,545) (n_w=1,434); 2011 (n=1,627) (n_w=1,546); 2013 (n=1,494) (n_w=1,531)

* Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2010 and 2012.

Figure 71: Primary Travel Mode to Work or School by Commuter Status and Area of Residence

The majority of commuters live and work in the same geographic area.

- This is notable among Seattle / North King County residents (76% live and work in the same area) and, to a lesser extent, East King County residents (60% live and work in the same areas).

The increase in the percentage of commuters to downtown Seattle is due primarily to commuters living in Seattle / North King County and South King County.

- Use of Metro has increased significantly in both of these areas.

Work Location by Area of Residence 2013			
	Seattle / N. King $(n=481)(n_w=557)$ (A)	**South King** $(n=478)(n_w=541)$ (B)	**East King** $(n=535)(n_w=434)$ (C)
DT Seattle	**49%** (BC)	27%	20%
Other North King	**27%** (BC)	6%	6%
DT Bellevue	3%	8%	**16%** (AB)
Other East King	8%	7%	**44%** (AB)
South King	6%	**41%** (AC)	3%
Other	8%	11%	10%
Columns in tables may sum to more or less than 100% due to rounding.			

Trends in Work Location by Area of Residence		
Seattle / N. King		
2009 $(n=502)(n_w=557)(A)$	**2011** $(n=530)(n_w=591)(B)$	**2013** $(n=481)(n_w=557)(C)$
DT Seattle 45%	41%	49% (B)
Other North King 30%	28%	27%
DT Bellevue 5%	4%	3%
Other East King 6%	11%	8%
South King 6%	8%	6%
Other 7%	8%	8%
South King		
2009 $(n=527)(n_w=513)$	**2011** $(n=522)(n_w=528)$	**2013** $(n=478)(n_w=541)$
DT Seattle 18%	16%	27% (AB)
Other North King 10%	9%	6%
DT Bellevue 5%	6%	8%
Other East King 9%	12%	7%
South King 48% (C)	45%	41%
Other 11%	13%	11%
East King		
2009 $(n=516)(n_w=365)$	**2011** $(n=575)(n_w=427)$	**2013** $(n=535)(n_w=434)$
DT Seattle 15%	18%	20%
Other North King 12%	8%	6%
DT Bellevue 12%	13%	16%
Other East King 45%	43%	44%
South King 6%	5%	3%
Other 10%	13%	10%

King County METRO

Figure 72: Mode Split by Work Location

Commuters working in downtown Seattle and, to a lesser extent, the University community (campus and district) are the most likely to use Metro for their commute trips.
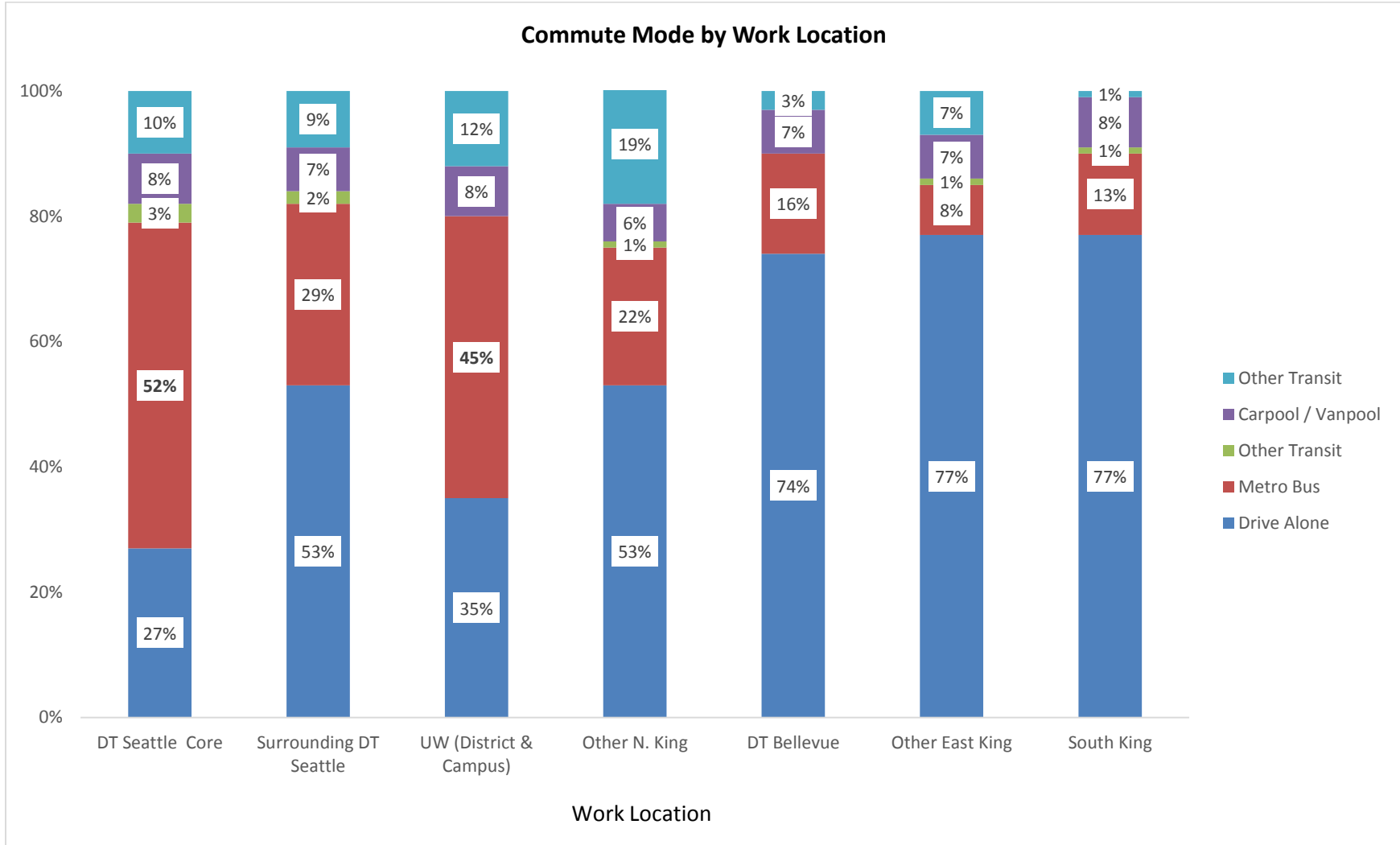
COMMUTER DISTANCE TO WORK AND TRAVEL TIME

Figure 73: Distance and Travel Time to Work

Distance and travel time to work increased significantly between 2011 and 2013.

- Trip length increased the most for commuters living in Seattle / North King County. However, they continue to have the shortest trips.
- Travel time increased the most for commuters living in South King County.

Commuter Distance (in miles) to Work and Travel Time (in minutes) By Area of Residence			
	2009 (n=502) (nw=557) (A)	2011 (n=530) (nw=591) (B)	2013* (n=237) (nw=280) (C)
Seattle / North King			
Average Distance	8.4	8.9	12.3 (AB)
Average Travel Time	25.9	25.7	29.0 (AB)
South King			
	2009 (n=527) (nw=513)	2011 (n=522) (nw=528)	2013* (n=259) (nw=298)
Average Distance	13.9	13.7	17.3 (AB)
Average Travel Time	27.7	28.9	32.8 (Ab)
East King			
	2009 (n=516) (nw=365)	2011 (n=575) (nw=427)	2013* (n=267) (nw=221)
Average Distance	12.1	11.5	14.1 (AB)
Average Travel Time	25.8	26.2	30.7 (AB)

Commuter Distance to Work and Travel Time All Commuters			
	2009 (n=1,445) (nw=1,434) (A)	2011 (n=1,627) (nw=1,546) (B)	2013* (n=763) (nw=799) (C)
Distance to Work			
0 to 4 Miles	26%	27%	25%
5 to 9 Miles	25%	22%	27%
10 to 19 Miles	31%	33%	28%
20 or More Miles	18%	18%	20%
Mean (miles)	11.5	11.3	14.7 (AB)
Travel Time to Work			
0 to 10 Minutes	20%	18%	18%
11 to 15 Minutes	15%	19%	15%
16 to 30 Minutes	41%	37%	37%
31 to 45 Minutes	15%	16%	16%
> 45 Minutes	9%	10%	14% (Ab)
Mean (minutes)	26.5	26.9	30.9 (AB)

Question C3RC: How many miles do you travel from home to work or school one-way?
Question C3ARC: About how long does your travel from home to (work/school) one-way take you?
*Base: All commuters; * to minimize survey length, asked of random sample of half of all commuters.*
Analysis includes years when both Riders and Non-Riders were surveyed. Only Riders were surveyed in 2010 and 2012.

COMMUTER PARKING

Figure 74: Parking Locations

Nearly three out of five (57%) commuters who drive have free parking in a parking lot at work. This is noteworthy for those working in:

- South King County (81%)
- East King County excluding downtown Bellevue (71%)

As well as those working in:

- Downtown Bellevue (53%)
- North King County, excluding downtown Seattle and University (56%)

Nearly one out of seven (15%) commuters park in a garage.

- Nearly half (49%) of those working in downtown Seattle park in a garage.

A similar number (16%) park on the street for free (13%) or paid (3%).

- More than one out of four (26%) commuters working in downtown Seattle park on the street; most pay (19%).

- A similar percentage (31%) of those parking in the areas immediately surrounding downtown also park on the street; most (28%) park for free.

**Parking Locations
All Commuters who Drive**

- Other 3%
- Surface Lot 9%
- Garage 15%
- On-Street 16%
- Free parking lot 57%
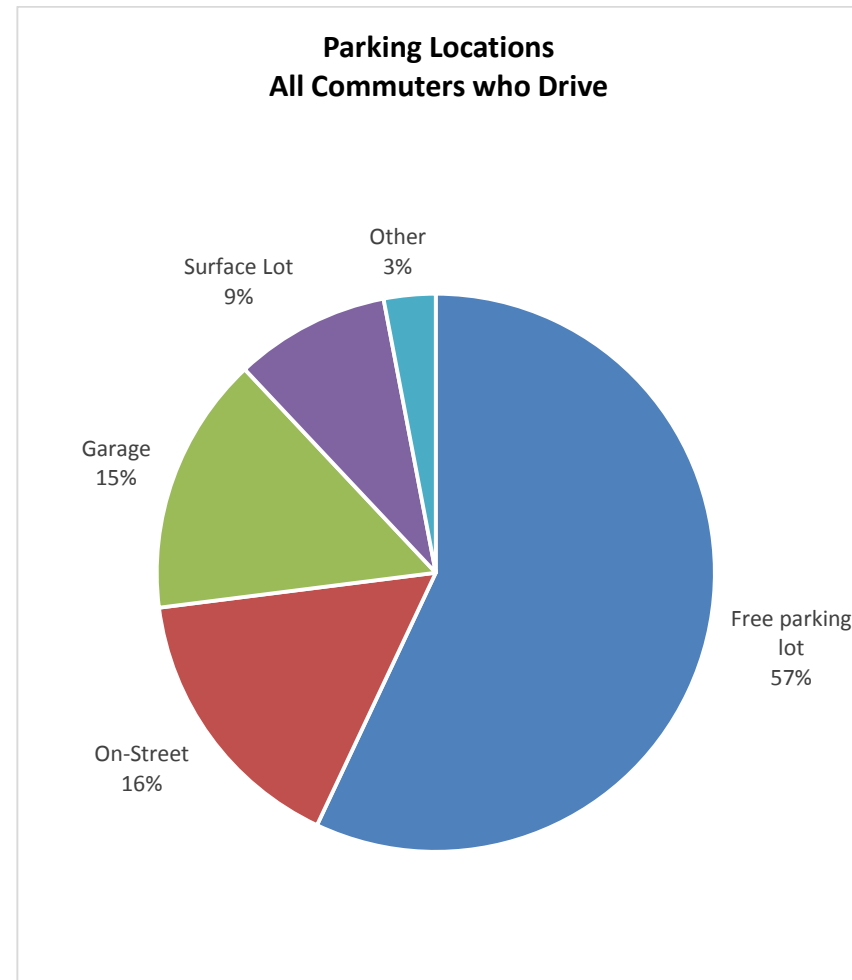
Question C8A: When you [drive / carpool / vanpool] to [work / school] where do you usually park?
Base: Work or school commuters who primarily drive alone, carpool, or vanpool (n=685) (n$_w$=1,036)

	Downtown Seattle Core (n=64)(n_w=91) (A)	Surrounding DT Seattle (n=97)(n_w=145) (B)	University (n=31)(n_w=46) (C)	Other North King (n=51)(n_w=59) (D)	Downtown Bellevue (n=70)(n_w=103) (E)	Other East King (n=154)(n_w=223) (F)	South King (n=132)(n_w=225) (G)
Parking Locations by Work Location							
Parking Lot	21%	42%	51%	69%	65%	80%	90%
Free	19%	34% (a)	32%	56% (ABc)	53% (ABc)	71% (ABCdE)	81% (ABCDE)
Paid	2%	8%	19% (A)	13% (A)	12% (A)	9% (A)	9% (a)
Garage	49% (BCDEFG)	27% (DFG)	21% (G)	7%	25% (DfG)	11% (G)	2%
On-Street	26%	31%	19%	20%	10%	7%	7%
Free	7%	28% (AcEFG)	10%	20% (AeFG)	8%	7%	7%
Paid	19% (BE)	3%	9%		2%		
Other	4%	0%	8%	4%	0%	2%	1%

Figure 75: Extent to Which Employers / School Subsidize Parking

The majority of those who drive alone or carpool and park receive some subsidy from their employers or schools. This is noteworthy among Non-Riders.

Extent to Which Commuters Who Drive or Carpool Receive Subsidized Parking by Primary Commute Mode				
	Drive Alone (n=587) (n$_w$=901) (A)	**SOV Metro Rider** (n=146) (n$_w$=170) (B)	**SOV Metro Non-Riders** (n=441) (n$_w$=731) (C)	**Carpool / Vanpool** (n=80) (n$_w$=111) (D)
Full Subsidy	66%	48%	70% (B)	58%
Partial	4%	9% (C)	3%	5%
No Subsidy	30%	43% (C)	27%	37%
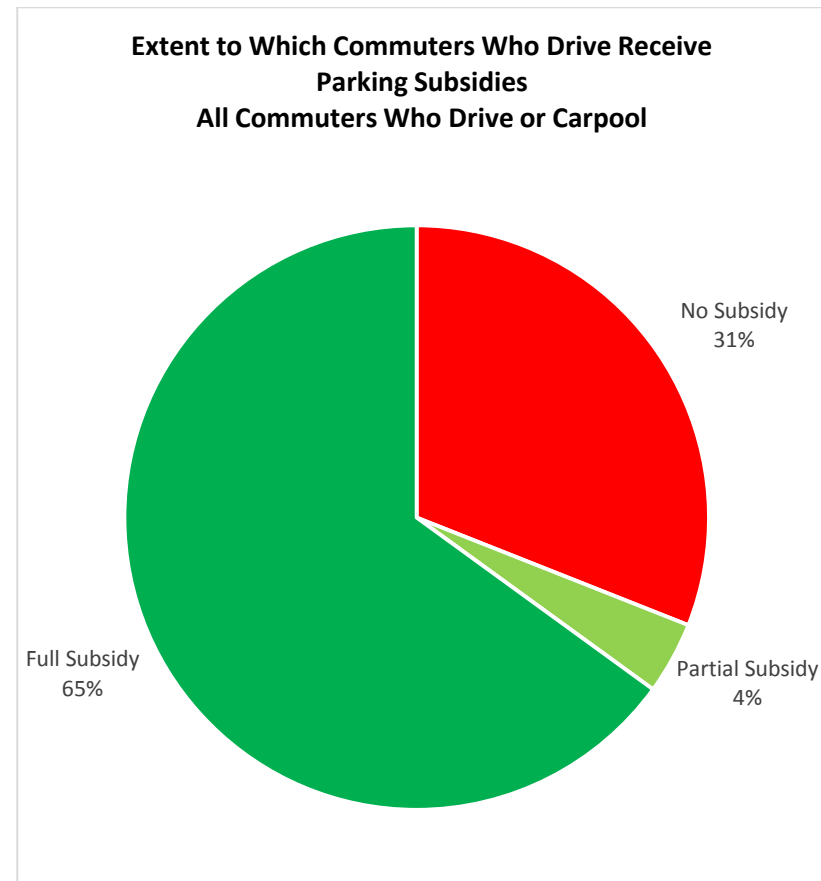
Extent to Which Commuters Who Drive Receive Parking Subsidies
All Commuters Who Drive or Carpool

Pie chart: No Subsidy 31%, Partial Subsidy 4%, Full Subsidy 65%

Base: *Work or school commuters who drive alone or carpool and park in garage, surface lot, pay for on-street parking, or get free parking in lot (n=667) (n$_w$=1,012)*

Drive alone commuters working in downtown Seattle, the areas surrounding downtown, and at the UW (district or campus) are the most likely to pay for all parking costs.

Extent to Which Commuters Who Drive or Carpool Receive Subsidized Parking by Work Location
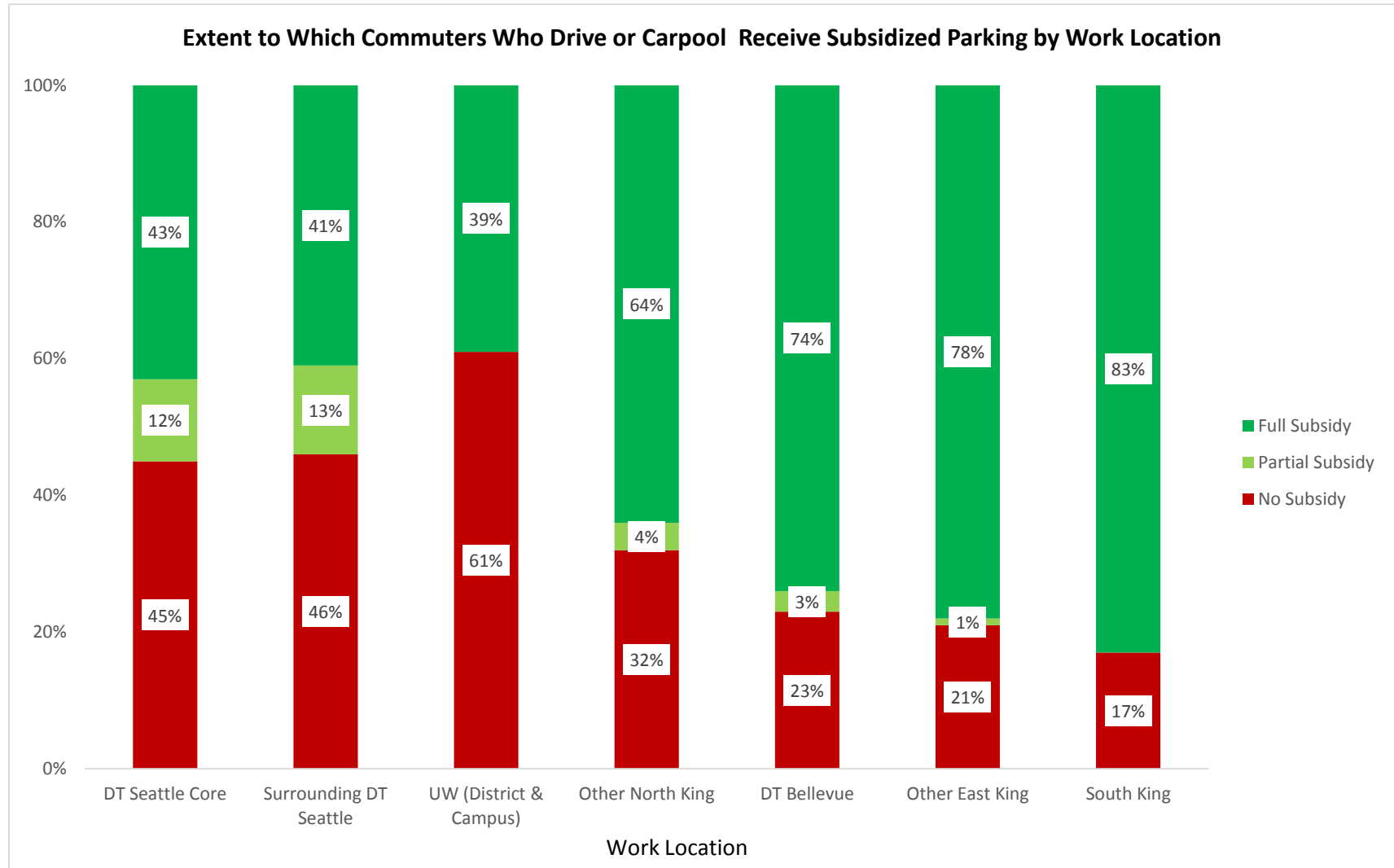
Variable: EMPSUB computed variable based on responses to C8A, C9A, and C9D

Base: Work or School Commuters who drive alone or carpool and park in garage, surface lot, pay for on-street parking, or get free parking in lot Downtown Seattle (n=62)(n_w=90); Surrounding DT Seattle (n=95)(n_w=139); University (n=28)(n_w=41); Other North King (n=48)(n_w=57); Downtown Bellevue (n=69)(n_w=102); Other East King (n=151)(n_w=220); South King (n=131)(n_w=225)

COMMUTER POTENTIAL METRO RIDERSHIP

Commuters were asked two questions to gauge potential ridership for their commute travel. The first question is similar to one used in prior years and asked those who do not currently use transit for their commute how appealing it would be to use. Those who indicated that it would be appealing or were neutral in regard to appeal were asked a follow-up question to determine their likelihood of using transit for their commute travel.

Figure 76: Overall Appealing of Using Metro Commute Travel

The appeal of using Metro for commute travel is clearly mixed. However, more than two out of five SOV commuters suggest that it is at least somewhat appealing.

- SOV commuters who ride Metro are the most likely to suggest it is appealing (56%).
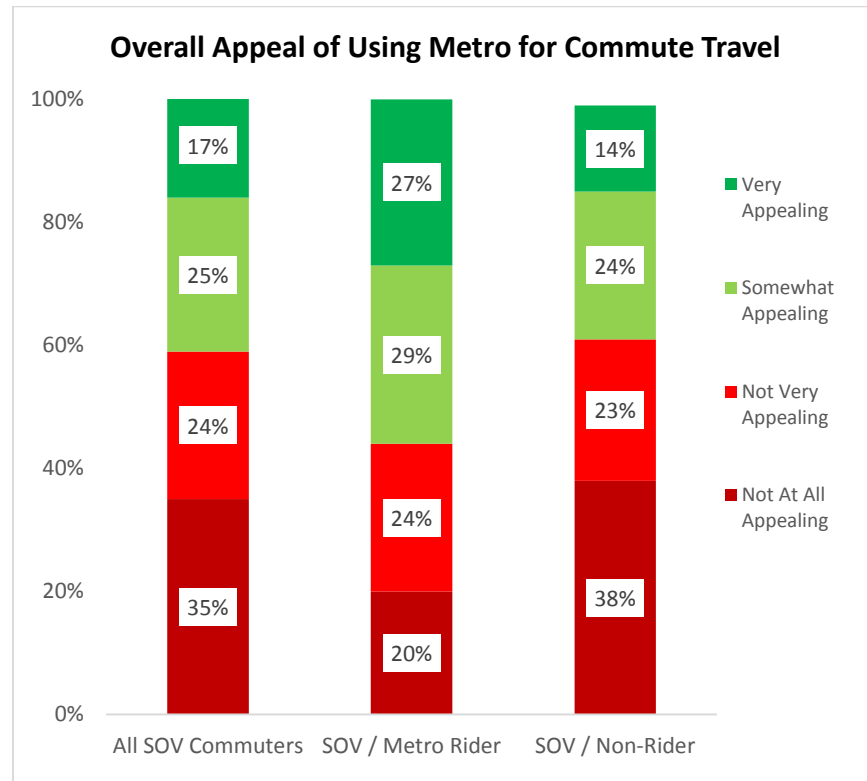
Overall Appeal of Using Metro for Commute Travel

	All SOV Commuters	SOV / Metro Rider	SOV / Non-Rider
Very Appealing	17%	27%	14%
Somewhat Appealing	25%	29%	24%
Not Very Appealing	24%	24%	23%
Not At All Appealing	35%	20%	38%

Question C10A: Overall, how appealing to you personally is the idea of using Metro to get to work or school?
Base: All SOV commuters (n = 594) (nw=911); SOV / Metro Rider (n = 149) (nw=175); SOV / Metro Non-Rider (n = 445) (nw=736)
Columns may sum to more or less than 100% due to rounding.
% neither appealing or not appealing not included, < 1% of base

Figure 77: Likelihood of Using Metro for Commute Trips

Nearly one out of five (18%) SOV commuters suggest that they would be very likely to use Metro to commute to work or school if service was available; an additional 13 percent indicate they would be somewhat likely to use Metro.

Potential ridership is highest among current Regular Riders. However, there is relatively high interest among Non-Riders.
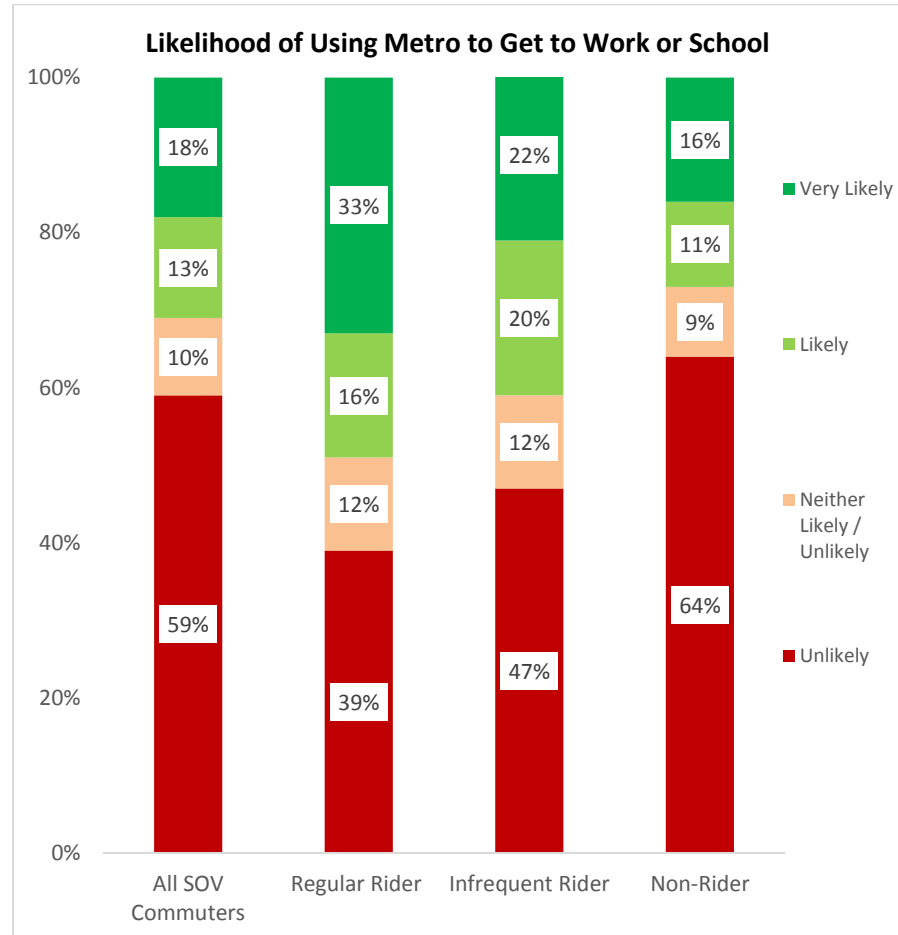
Likelihood of Using Metro to Get to Work or School

Question C10A_1: If convenient transit service was available to where you work / go to school, how likely would you be to ride Metro?

Base: Question asked of those who found idea of using Metro to get to work or school appealing; rebased to include those who said it was not appealing and assumed that they would be unlikely to ride.

All SOV commuters (n = 594) (n_w=911); Regular Riders (n = 92) (n_w=114); Infrequent Riders (n = 57) (n_w=170); Non-Riders (n = 445) (n_w=872)

Columns may sum to more or less than 100% due to rounding.

DETAILED FINDINGS—PERSONAL TRAVEL

Several questions were included related to personal travel behavior and attitudes. In addition to asking how respondents primarily travel, they were asked two questions to gauge potential ridership for their personal travel. The first question is similar to one used in prior years and asked those who do not currently use transit for their personal travel how appealing it would be to use. Those who indicated that it would be appealing or neutral were asked a follow-up question to determine their likelihood of using transit for their personal travel.

Topic	What We Found	Key Stats	What It Means
Travel Mode	The majority of all King County residents drive alone (70%) or with others (17%) for their personal travel. However, use of Metro varies significantly by frequency of current ridership.	**Personal Travel** |	Regular Riders	Infrequent Riders	Non-Riders
Drive Alone	45%	72%	78%
Drive w/ others	17%	13%	17%
Metro	32%	6%	1%
Other	7%	9%	4%		While Metro's core market are commuters, it is clear that Metro is an important source of transportation for Regular Riders for their personal travel as well.
Potential Ridership	About two out of five (41%) residents who currently do not use Metro for their personal travel say that the idea of using Metro for their personal travel is at least somewhat appealing. Nearly three out of ten (28%) of all respondents who drive alone for personal travel suggest they would be at least somewhat likely to use Metro for personal travel if service was available; 15 percent suggest they would be very likely.	**Do Not Use Transit for Personal Travel** **Appeal of Using Metro for Personal Travel** 	Appeal		% Appealing
Very	9%	
Somewhat	32%	41%
Not Very	32%	
Not at All	26%	| **Likelihood of Using Metro for Personal Travel** | Likelihood		% Likely
Very Likely	15%	
Likely	13%	28%
Neutral	12%	
Unlikely	60%			When compared to potential for commute travel (page 139), there is only somewhat less potential for Metro use for personal trips (31% versus 27%, respectively). At the same time, there is clearly some interest. Understanding the nature of trips and primary destinations or trip purposes could lead to some incremental use of Metro.

PERSONAL TRAVEL MODE

Figure 78: Personal Travel Mode

Seven out of ten (70%) King County residents drive alone for their personal travel; an additional 17 percent drive with others (carpool).

- The percentage driving alone for personal travel increased between 2009 and 2011 (65% and 69%, respectively) and remained stable in 2013.

While the majority (62%) of Regular Riders also drive alone or with others, one out of three use the bus.

- The percentage of Regular Riders using the bus for their personal travel increased significantly between 2009 and 2011 (24% and 32%, respectively) and remained the same in 2013.

The percentage of Non-Riders driving alone for personal travel has increased over the past five years.

Personal Travel Mode 2013 by Rider Status				
	All Respondents	Regular Riders	Infrequent Riders	Non-Riders
	(n=2,414)	(n=1,207)	(n=188)	(n=1,016)
	(nw=2,414)	(nw=567)	(nw=324)	(nw=1,522)
		(A)	(B)	(C)
Drive Alone	70%	45%	72%	78%
			(A)	(A)
Carpool	17%	17%	13%	17%
Metro Bus	9%	32%	6%	1%
		(BC)	(c)	
Walk / Bicycle	4%	5%	7%	3%
Other	1%	2%	2%	1%

Question PT1A:- *What method of transportation do you usually use to get around for most of your personal travel?*
Base: *All respondents (n=2,414) (nw=2,414*
Columns may sum to more or less than 100% due to rounding.

Primary Travel Modes for Personal Travel 2009 – 2013*		
2009	2011	2013
(n=2,425)	(n=2,521)	(n=2,414)
(nw=2,425)	(nw=2,521)	(nw=1,414)
(A)	(B)	(C)
% Driving Alone for Personal Travel		
All Respondents		
65%	69%	70%
	(A)	(A)
All Riders		
52%	51%	55%
Non-Riders		
70%	75%	78%
	(A)	(A)
% Riders Use Metro for Personal Travel		
All Riders		
17%	24%	22%
	(A)	(A)
Regular Riders		
24%	32%	32%
	(A)	(A)
Infrequent Riders		
7%	11%	6%

* Non-riders are surveyed every other year

PERSONAL TRAVEL POTENTIAL RIDERSHIP

Figure 79: Potential Ridership for Personal Travel

The appeal of using Metro for personal travel is clearly mixed. However, two out of five (41%) King County residents who currently do not use Metro for their personal travel suggest that it is at least somewhat appealing.

- Overall appeal of using Metro for personal travel does vary by recent experience with Metro.

Nearly one out of seven (15%) residents who currently drive alone for their personal travel suggest that they would be very likely to use Metro if service was available; an additional 13 percent would be somewhat likely.

- Potential ridership is greatest among those who currently ride.

Overall Appeal of Using Metro for Personal Travel

Likelihood of Using Metro for Personal Travel

Question PT2A: Overall, how appealing to you personally is the idea of using Metro for your personal travel?
Base: Respondents who do not use transit for personal travel (n = 2,005) (nw=2,189)
Columns may sum to more or less than 100% due to rounding.
% neither appealing or not appealing not included, < 1% of base

Question PT2A_1 If convenient transit service was available to places you go for your personal travel, how likely would you be to ride Metro?
Base: Question asked of those who were neutral or found idea of using Metro to get to work or school appealing; rebased to include those who said it was not appealing and assumed that they would be unlikely to ride (n = 1,982) (nw=2,170); Regular Riders (n = 826) (nw=380); Infrequent Riders (n = 155) (nw=301); Non-Riders (n = 990) (nw=1,489)
Columns may sum to more or less than 100% due to rounding.

DETAILED FINDINGS—NON-RIDERS

Non-Riders are generally surveyed every two to three years, most recently in 2009, 2011, and 2013. Questions focus on former ridership, potential ridership, and perceptions of transit in general and specifically of Metro.

Topic	What We Found	Key Stats	What It Means
Non-Riders' Transit Use	One out of six Non-Riders have experience riding other regional transportation service. Link Light Rail is the most used other system by Metro Non-Riders. Nearly one out of four Non-Riders have had recent (within the past six months) experience riding Metro. Only one out of ten (11%) Non-Riders have never ridden Metro—down significantly from 2009 (19%) and 2011 (16%).	**% of Non-Riders Using Other Transit** All Non-Riders 16% Seattle / N. King 21% South King 18% East King 11% **% of Non-Riders Riding Metro Past 6 Months** All Non-Riders 23% Seattle / N. King 36% South King 14% East King 26% **% of Non-Riders Never Ridden** All Non-Riders 11% Seattle / N. King 6% South King 14% East King 9%	A significant percentage of Non-Riders have at least some experience using transit, and many have relatively recent experience. This would indicate that for a large segment of Non-Riders, lack of familiarity or an aversion to using transit is not a significant issue. Instead, perceived convenience and availability of service are cited as primary reasons for not riding or not riding more often. This would suggest that like Regular Riders, there are multiple segments of Infrequent Riders—those that regularly ride and those that ride but not regularly. This finding also clearly demonstrates Metro's value—providing options for transportation even for very Infrequent Riders.
Use of Park-and-Ride Lots	Non-Riders' use of park-and-ride lots has grown significantly since 2011. The percentage of Non-Riders using a park-and-ride lot in the past year (31%) is nearly the same as Regular (34%) and Infrequent Riders (36%).	**Non-Riders' Use of Park-and-Ride Lots** 2009 25% 2011 24% 2013 31%	As with general use of transit, Non-Riders' use of park-and-ride lots—to meet other people, or to use transit—demonstrates an openness to the use of alternative modes of transportation and a recognition of the value of the support services Metro offers.

King County METRO

Topic	What We Found	Key Stats	What It Means
Attitudes toward Metro	When asked the extent to which they agree or disagree with statements about riding, five primary factors emerged.	**Agreement That Factor is a Barrier to Riding** Convenience — 3.35 Image — 2.83 Safety — 2.66 Lack of Confidence — 236 Access to Service — 2.28 *Mean based on 5-point scale "1" = strongly disagree; "5" = "strongly agree"*	No single factor emerges as the primary barrier, suggesting that there are segments of Non-Riders with different concerns and issues influencing their decision to ride.
Non-Rider Segments	Six Non-Rider segments were identified based on these attitudes. Each were clearly differentiated by their attitudes toward Metro and riding transit and ranged in size from 25 percent to 13 percent of Non-Riders. Segments were named based on the barriers identified within that segment.	**Non-Rider Segments** **% of Non-Rider Market** Image Conscious — 25% Reliability Concerns — 19% Safety Conscious — 15% Difficult to Use — 14% Limited Access — 14% Comfort Concerns — 13%	Identifying segments such as these and understanding key differences within and between segments offers Metro the opportunity to target marketing communications messages to address key concerns.
Potential Ridership	The Non-Rider segment that has concerns about reliability is the most likely segment to suggest that riding Metro would be appealing if there was convenient service available.	**Non-Rider Segments** **Appeal of Using Metro for Commute and/or Personal Travel** |	Very Appealing	Not Appealing
---	---	---
Reliability Concerns	18%	50%
Safety Conscious	10%	49%
Comfort Concerns	10%	52%
Difficult to Use	11%	57%
Image Conscious	10%	58%
Limited Access	8%	58%		Continued improvements in level of service—notably frequency of service, the most important factor for this segment—would be required to attract those in the Reliability Concerns segment.

King County METRO

NON-RIDERS' DEMOGRAPHIC CHARACTERISTICS

Figure 80: Demographic Characteristics of Metro Riders

- There are no gender differences between Riders and Non-Riders.

- Non-Riders are significantly older than Riders, notably older than Regular Riders.

	All Riders (n=1,395) (n$_w$=892) (A)	Regular Riders (5+ trips) (n=1,207) (n$_w$=567) (B)	Infrequent Riders (1–4 trips) (n=188) (n$_w$=324) (C)	Non-Riders (0 trips) (n=1,019) (n$_w$=1,522) (D)
Gender				
Male	51%	51%	51%	50%
Female	49%	49%	49%	50%
Age				
16–17	3%	3%	2%	2%
18–24	13%	15%	8%	7%
25–34	20% (D)	19% (D)	22% (D)	15%
35–44	19%	20% (d)	16%	17%
45–54	18%	17%	19%	20%
55–64	16%	16%	15%	19%
65 plus	13%	10%	18% (B)	21% (AB)
Mean	43.2	41.4	46.2 (B)	49.1 (ABC)

Columns may sum to more or less than 100% due to rounding.

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level.

King County METRO

	All Riders (n=1,395) (nw=892) (A)	Regular Riders (5+ trips) (n=1,207) (nw=567) (B)	Infrequent Riders (1–4 trips) (n=188) (nw=324) (C)	Non-Riders (0 trips) (n=1,019) (nw=1,522) (D)
Employment Status				
Employed FT	52% (D)	59% (CD)	41%	46%
Employed PT	9%	11%	6%	8%
Self-Employed	6%	3%	12% (B)	10% (BC)
Student (not working)	10% (D)	10% (D)	8% (d)	4%
Homemaker	2%	2%	3%	3%
Retired	13%	8%	21% (B)	22% (AB)
Unemployed	5%	4%	6%	5%
Disabled / Other	3%	3%	2%	2%
Income				
Less than $35K	25% (D)	27%	26%	21%
$35K–<$55K	17%	17%	15%	16%
$55K–<$75K	18%	18%	17%	17%
$75K–<$100K	13%	13%	14%	16% (b)
$100K–<$150K	15%	14%	16%	13%
$150K or more	12%	12%	13%	18% (AB)
Median	$64,591	$62,642	$68,400	$72,400

- Non-Riders are more similar to Infrequent Riders than Regular Riders in terms of their employment status.

- Non-Riders are more affluent than Riders; notably they are more affluent than Regular Riders.

Columns may sum to more or less than 100% due to rounding.

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level.

- The household composition of Non-Riders is more similar to that of Infrequent Riders than to Regular Riders.

- The race and ethnicity of Non-Riders are more similar to Infrequent Riders than to Regular Riders.

- Non-Riders are much more likely to have a driver's license and access to vehicles than Riders, particularly Regular Riders.

	All Riders (n=1,395) (nw=892) (A)	Regular Riders (5+ trips) (n=1,207) (nw=567) (B)	Infrequent Riders (1–4 trips) (n=188) (nw=324) (C)	Non-Riders (0 trips) (n=1,019) (nw=1,522) (D)
Household Composition				
Single-Person Household	26%	23%	30%	27% (b)
Multi-Person Household	74%	77% (d)	70%	73%
Average Household Size	2.22 (D)	2.32 (CD)	2.05	2.10
Race /Ethnicity				
White	74%	71%	78% (b)	79% (AB)
Black	6%	8%	4%	4%
Asian	11%	12%	9%	8%
Amer. Indian /Alaska Native	3%	3%	4%	2%
Hispanic	5%	6%	4%	5%
Mixed Race	1%	1%	<1%	2%
Access to Vehicle(s)				
% w/ Driver's License	86%	82%	93% (B)	96% (AB)
% w/ Vehicle	89%	86%	93% (B)	97% (AB)
# of Vehicles	1.7	1.6	1.8 (B)	2.2 (ABC)

Columns may sum to more or less than 100% due to rounding.

Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level.

King County METRO

NON-RIDERS' TRANSIT USE

Figure 81: Use of Other Transit Systems

One out of six (16%) Non-Riders uses at least one of the other public transit services in the region (excluding Metro).

- Non-Riders living in Seattle / North King County and, to a lesser extent, South King County are more likely to use another service than those living in East King County.

Link Light Rail and Sound Transit Buses are the most frequently used "other" transit services in the region.

Other Transit Systems Used Overall and by Area of Residence				
	Other Transit Users (n=194) (nw=280)	**Seattle / N. King** (n=79) (nw=97) (A)	**South King** (n=74) (nw=120) (B)	**East King** (n=41) (nw=63) (C)
Link Light Rail	35%	35% (C)	49% (aC)	10%
ST Bus	21%	14% (b)	5%	62% (AB)
WSF	21%	19%	22%	20%
Sounder Train	10%	4%	13% (a)	11%
Water Taxi	3%	8% (b)	1%	0%
Community Transit	3%	5%	0%	6%
Other	8%	5%	12%	6%

Question NON1B: Which do you use most often?
Multiple response allowed; columns sum to more than 100%.
Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level.

% of Non-Riders Who Use Other Transit Service
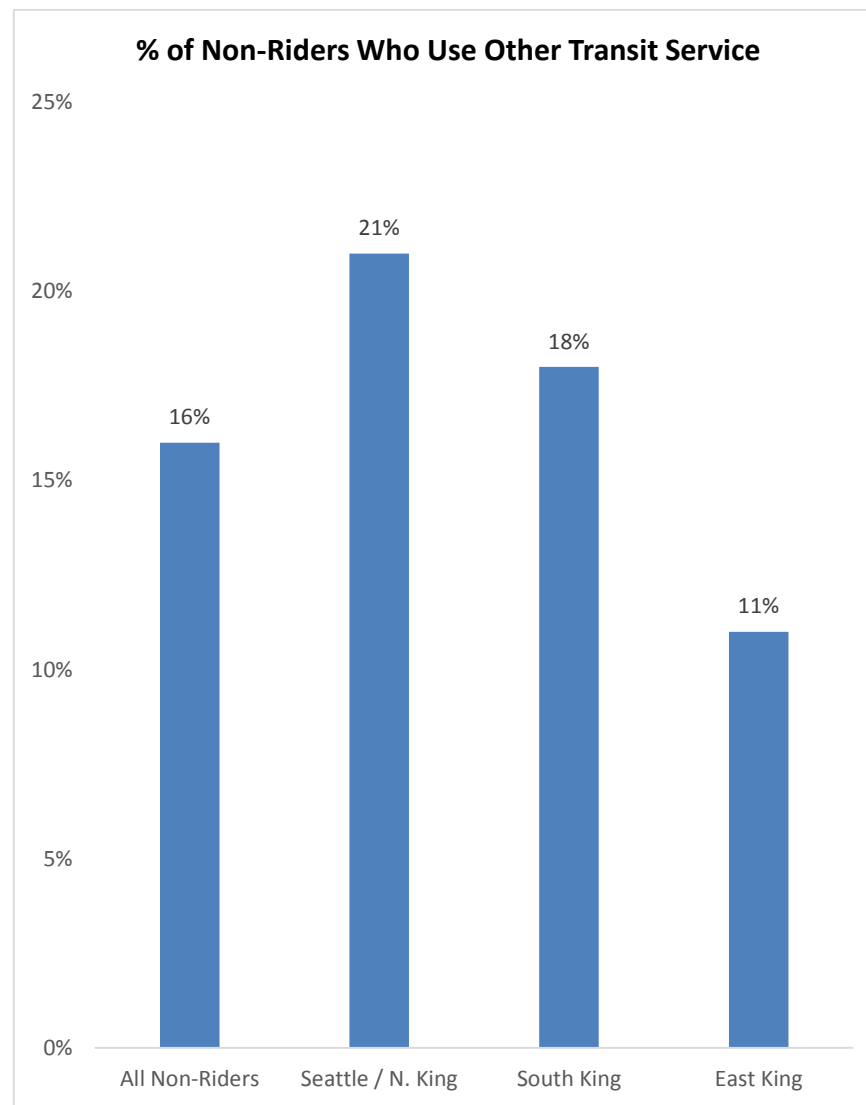
Question NON1A: Do you use any of the other public transportation services in the area?
Base: All Non-Riders (n=1,019) (nw=1,522); all Seattle/ N. King Non-Riders (n=295) (nw=355); all South King Non-Riders (n=363) (nw=641); all East King Non-Riders (n=361) (nw=526)

NON RIDERS' USE OF METRO

Figure 82: Non-Riders' Past Use of Metro

The majority of Non-Riders have some experience riding Metro. The percentage of Non-Riders who have never ridden has decreased significantly since 2009. In addition, the percentage with recent experience has increased significantly since 2011.

Past ridership of Metro varies significantly by area of residence.

- Residents of Seattle / North King County have consistently had more recent experience with riding Metro than have residents of South, and to a lesser extent, East King County.
- The extent to which East King County Non-Riders have ridden recently (within the last 6 months) increased significantly between 2011 and 2013. Moreover, the percentage who have never ridden has decreased steadily over the years and is now only slightly higher than in Seattle / North King County.
- The percentage of recent Riders in South King County has varied over the years but not significantly. The percentage of "never ridden" decreased between 2011 and 2013 but remains higher than in Seattle / North King and, to a lesser extent, East King.

Non-Riders' Past Use of Metro by Area of Residence			
	2009 (n = 1,008) (nw=1,713) (A)	**2011** (n = 1,066) (nw=1,828) (B)	**2013** (n = 1,019) (nw=1,522) (C)
Ridden in Past 6 Months			
Seattle / North King	37%	34%	36%
South King	17%	12%	14%
East King	20%	17%	26% (BC)
Never Ridden			
Seattle / North King	8%	8%	6%
South King	23%	22%	14% (AB)
East King	26%	15% (A)	9% (AB)
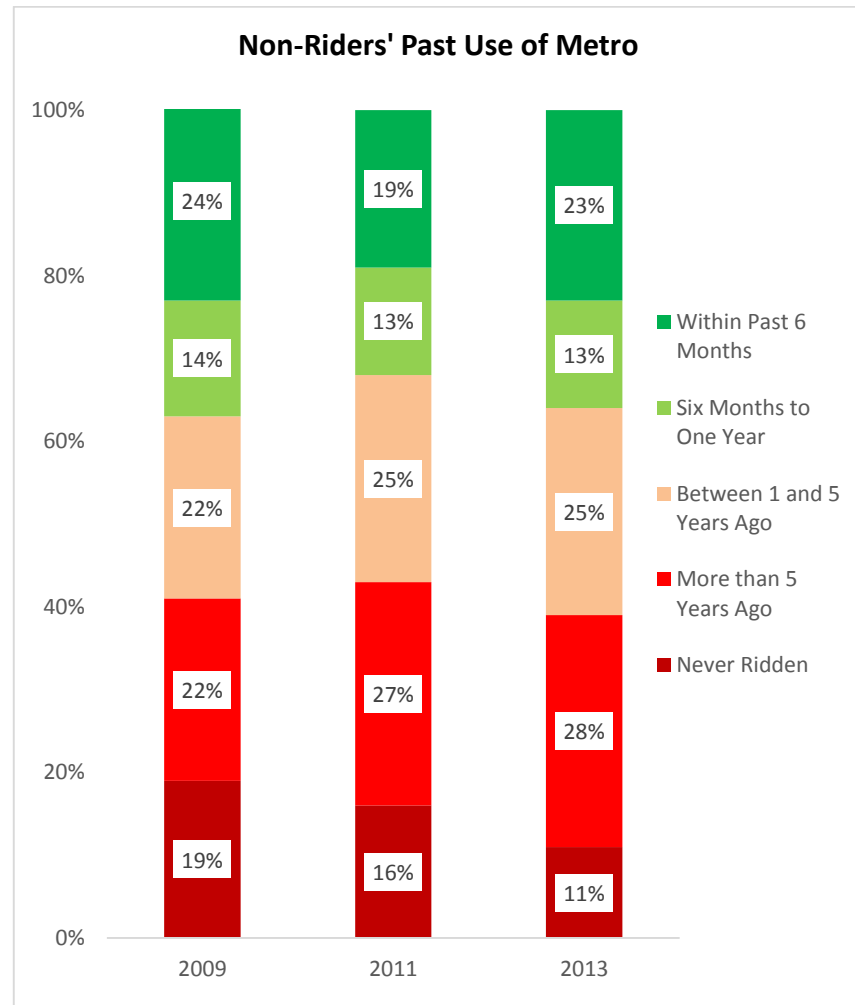
Question NON2: *When was the last time you rode a Metro bus or the South Lake Union Streetcar?*
Base: *Non-Riders 2009 (n=1,008); (nw=1,713); 2011 (n=1,066); (nw=1,828); 2013 (n=1,019); (nw=1,522)*
Columns may sum to more or less than 100% due to rounding.

Figure 83: Former Riders' Trip Purpose

The majority of Non-Riders who have past experience riding primarily used Metro for non-commute trips:

- Recreation (25%)
- Special events (13%)
- Downtown Seattle (11%)
- Shopping / errands (8%)

More than one out of four (27%) indicated that their primary trip purpose was to commute:

- To work (21%)
- To school (6%)

Former Non-Riders living in Seattle / North King County were the most likely to say that when they used Metro, they were doing so to commute to work.

- A significant percentage (9%) of South King County former Riders used Metro to get to school.

	Former Riders' Primary Trip Purpose When Rode Metro			
	All Former Riders (n = 635) (nw = 929)	**Seattle / N. King** (n = 200) (nw = 270) (A)	**South King** (n = 198) (nw = 338) (B)	**East King** (n = 226) (nw = 322) (C)
Recreation	25%	17%	29% (A)	27% (A)
Special Events	13%	10%	10%	18% (AB)
Downtown Seattle	11%	12%	12%	10%
Shopping / Errands	8%	11% (b)	5%	8%
To / From Work	21%	32% (BC)	18%	16%
To / From School	6%	3%	9% (A)	5%
Appointments	5%	5%	4%	6%
Jury Duty	4%	2%	6%	4%
Airport	2%	2%	1%	3%
Other	3%	4%	4%	1%
No Single Purpose	3%	3%	3%	2%

Question NON2A: When you rode Metro, what was the primary purpose of the trip you took most often?
Base: Non-Riders who have ridden in the past five years
Columns may sum to more or less than 100% due to rounding.
Uppercase letters indicate significant differences from the column noted at the 95% confidence level; lowercase letters indicate significance at the 90% level.

King County METRO

Figure 84: Primary Reasons Non-Riders Do Not Ride

Reasons given for not riding Metro fall into five primary categories:

- Inconvenient
- Limited access to service
- No need
- Travel time too long / dislike transferring
- Personal circumstances

Primary Reason(s) Non-Riders Do Not Ride

Reason	Percent
Too Inconvenient	17%
Car More Convenient	16%
Schedule Inconvenient	4%
No Route Where Need to Go	7%
Service Not Close to Home	3%
Bus Stop too Far	3%
No Need to Ride Anymore	6%
Work At / Close to Home	6%
Don't Leave / Go Far from Home	4%
Changed Jobs / Moved / Retired	5%
Travel Takes too Long / Dislike Transferring	11%
Need Car	5%
Irregular Work Schedule	2%
Have Children	1%

Categories:
- Inconvenient 37% (Too Inconvenient, Car More Convenient, Schedule Inconvenient)
- Access to Service 13% (No Route Where Need to Go, Service Not Close to Home, Bus Stop too Far)
- No Need 21% (No Need to Ride Anymore, Work At / Close to Home, Don't Leave / Go Far from Home, Changed Jobs / Moved / Retired)
- Personal Circumstances 8% (Need Car, Irregular Work Schedule, Have Children)

Question *NON2B: What is main reason you don't ride the bus or streetcar? Multiple responses allowed*
Base: *Former Non-Riders who have ridden in the past five years (n = 635) (n$_w$ = 929)*

NON-RIDERS' USE OF PARK-AND-RIDE LOTS

Figure 85: Non-Riders' Use of Park-and-Ride Lots

The percentage of Non-Riders using Metro's park-and-ride lots increased significantly in 2013 from previous years.

Non-Riders' overall use of park-and-ride lots is equivalent to that of Riders. However, they are less likely to have used one in the last 30 days, and their frequency of use (if used recently) is also lower.

Use of Park-and-Ride Lots in Past Year by Rider Status		
Regular Riders (n=1,207) (n$_w$=567) (A)	**Infrequent Riders** (n=188) (n$_w$=324) (B)	**Non-Riders** (n=1,019) (n$_w$=1,522) (B)
% Using Park-and-Ride Lot in Past Year		
34%	36%	31%
% Using in Past 30 Days **(Base: Used in Past Year)**		
75% (C)	63% (C)	29%
Number of Time Used in Past 30 Days **(Base: Used in Past 30 Days)**		
12.2	4.2	3.9

Primary reasons given by Non-Riders for using a park-and-ride lot include:
- Meet carpool (32%) or vanpool (2%)
- Meet people for an activity (24%) or to take transit to a special event (5%)
- Catch a Sound Transit bus (8%), Link Light Rail (6%), or Sounder (3%)
- Park to go to a nearby destination (9%)
- Catch a Metro bus (5%)

% of Non-Riders who Used Park-and-Ride Lot in Past Year
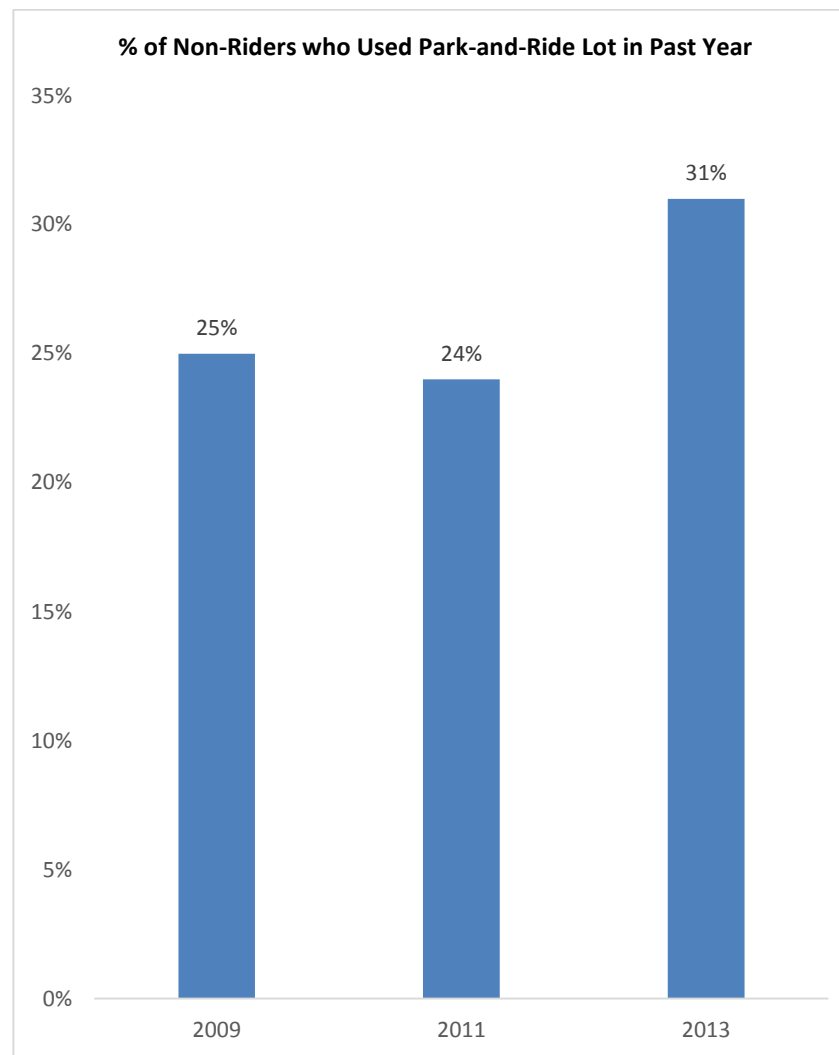
Question PR1 Have you used a Metro park and ride lot within the last year?:
Base: *Non-Riders 2009 (n=1,008); (n$_w$=1,713); 2011 (n=1,066); (n$_w$=1,828); 2013 (n=1,019); (n$_w$=1,522)*

Figure 86: Non-Riders' Satisfaction with Park-and-Ride Lots

Like Riders, Non-Riders who use park-and-ride lots are generally satisfied. They are most satisfied with the maintenance of facilities and least satisfied with the ability to get a parking space.

Non-Riders' Satisfaction with Park-and-Ride Lots				
	Total Satisfied	Very Satisfied	Somewhat Satisfied	Neutral / Dissatisfied
Maintenance of facilities	95%	61%	34%	5%
Personal safety at park-and-ride lot	89%	52%	37%	11%
Lighting at park-and-ride lots	87%	54%	33%	13%
Security of automobile at park-and-ride lots	88%	47%	41%	12%
Availability of parking at park-and-ride lots	78%	46%	32%	23%

Question PR3: Are you satisfied or dissatisfied with ____ at park-and-ride lots?
Base: Non-Riders who used park-and-ride lot in past year (n = 312) (n$_w$ = 470)
***Base** Non-Riders who have used park-and-ride lot in past 30 days (n = 92) (n$_w$ = 134)

King County METRO

[Blank page inserted for pagination purposes.]

NON-RIDERS' ATTITUDES TOWARD METRO / USING TRANSIT

Non-Riders were asked the extent to which they agree or disagree with 17 statements about different aspects of riding Metro. Factor analysis revealed five primary dimensions that reflect how Non-Riders feel about riding. These factors are named based on the statements that were highly correlated with that factor.

- The most significant barrier to riding Metro is perceived inconvenience, notably the amount of time it takes by bus compared to driving.
- The overall image of riding is the second significant barrier, notably a simple preference for driving.
- Perceptions of safety is the third major barrier. Concerns about the behavior of other Riders is a greater barrier than concerns about personal safety.
- Confidence is the fourth major barrier, notably confidence in Metro's reliability and overall familiarity with services.
- Access to service is the fifth major barrier. Availability of service to where Riders need to go is a greater barrier than access to service near where they live.

Figure 87: Attitudes towards Metro / Using Transit

Inconvenience		Image		Safety		Confidence		Access to Service	
Overall Mean	3.35	Overall Mean	2.83	Overall Mean	2.66	Overall Mean	2.36	Overall Mean	2.28
Statement	**% Agree / Mean**	**Statement**	**% Agree / Mean**	**Statement**	**% Agree / Mean**	**Statement**	**% Agree / Mean**	**Statement**	**% Agree / Mean**
Compared with driving, takes too much time	74% / 3.91	Just can't see themselves riding the bus	34% / 2.50	Worries about safety on the buses	30% / 2.39	Cannot count on Metro to get me there on time*	30% / 2.58	No bus stops near riders' home	23% / 2.04
Service too infrequent to make it convenient	51% / 3.15	Do not use because prefer to drive alone	53% / 3.16	Behavior of some people at stops makes rider uncomfortable	43% / 2.84	Not familiar with Metro services*	28% / 2.38	Difficult for rider to walk very far to stop	27% / 2.14
Difficult to use in bad weather	54% / 3.20			Behavior of some people on bus makes rider uncomfortable	47% / 2.96	Buses are not clean / comfortable*	14% / 2.13	No service to where riders want to go	38% / 2.65
Do not want to transfer	52% / 3.15			Worries about safety at stops	31% / 2.43				
Buses are too crowded	30% / 2.58								

Question: Do you agree or disagree with these statements about riding Metro? Do you strongly or somewhat agree / disagree?
Means are based on a five-point scale where "1" means "strongly disagree" and "5" means "strongly agree"; Mean for overall factor is the average of the variables that loaded into the factor
* Questions were asked as a positive statement (buses are clean and comfortable) and reverse coded for analytical purposes to reflect all other negatively worded statements
Base: *Non-Riders who do not ride any local / regional transit system (n = 988) (n$_w$ = 1,477)*

Using these attitudes, additional analysis (Convergent Cluster and Ensemble Analysis [CCEA]) was used to segment Non-Riders into clusters holding similar attitudes. Six Non-Rider segments were identified using this analysis. Segments were named based on the statements they most and least agreed with.

Figure 88: Non-Rider Attitudinal Segments

Image Conscious: This segment is the most likely to prefer driving and cannot see themselves riding transit. They are also the least familiar with Metro services. They have no positive attitudes toward riding.

Reliability Concerns: This segment is primarily concerned with frequency of service and related travel times, especially if they would need to transfer. This segment also lacks confidence in Metro's ability to get them where they need to go on-time.

Safety Conscious: This segment is primarily concerned with safety. Access to service is not a major issue.

Limited Access: This segment suggests that they do not have access to service near their home or to where they want to go. Of secondary concern is difficulty walking to a bus stop and frequency of service. This is the least likely segment to state they prefer to drive alone.

Difficult to Use: This segment suggests that difficulty walking to a stop and using the bus in bad weather is the primary barrier. They are least concerned about reliability and travel time.

Comfort Concerns: This segment feels buses are not clean or comfortable and that they are too crowded. A secondary issue for this segment is safety. They are, however, the least likely to agree that they just cannot see themselves riding Metro.

Non-Rider Segments

- Image Conscious 25%
- Reliablity Concerns 19%
- Safety Conscious 15%
- Difficult to Use 14%
- Limited Access 14%
- Comfort Concerns 13%

Base: Non-Riders who do not ride any local / regional transit system (n = 988) (n_w = 1,477)

King County METRO

Perceptions of Metro	Attitude Segments					
	Image Conscious	Reliability Concerns	Safety Conscious	Difficult to Use	Limited Access	Comfort Concerns
Do not use because prefer to drive alone	**0.85**	−0.33	0.19	−0.32	**−0.47**	−0.43
Just can't see themselves riding the bus	**0.43**	−0.17	0.21	−0.05	−0.17	**−0.52**
Not familiar with Metro services*	**0.33**	0.22	−0.31	−0.23	0.01	−0.32
Service too infrequent to make it convenient	−0.16	**0.72**	−0.37	−0.09	0.26	−0.48
Cannot count on Metro to get me there on time*	−0.14	**0.59**	0.22	**−0.39**	−0.06	0.18
Compared with driving, takes too much time	0.39	**0.44**	−0.08	**−0.61**	−0.36	−0.17
Would not ride if have to transfer	0.12	**0.21**	−0.06	−0.03	−0.16	−0.24
Worries about safety on the buses	−0.40	**−0.44**	**0.94**	0.21	−0.43	0.46
Worries about safety at stops	−0.42	**−0.44**	**0.82**	0.51	−0.41	0.29
Behavior of some people at stops makes rider uncomfortable	−0.24	**−0.51**	**0.79**	0.20	−0.46	0.51
Behavior of some people on bus makes rider uncomfortable	−0.16	**−0.48**	**0.71**	−0.01	−0.37	0.55
Difficult for rider to walk very far to stop	−0.09	−0.22	**−0.69**	**0.88**	0.63	−0.39
Difficult to use in bad weather	0.06	0.03	**−0.26**	**0.31**	−0.08	−0.13
No bus stops near riders' home	−0.30	−0.24	**−0.60**	0.20	**1.75**	−0.47
No service to where riders want to go	−0.40	0.66	**−0.56**	0.01	**0.79**	−0.41
Buses are not clean / comfortable*	0.04	0.07	−0.36	−0.34	−0.18	**0.82**
Buses are too crowded	0.09	−0.11	−0.14	−0.25	−0.29	**0.74**

Differences in Perceptions of Metro that Define Non-Rider Attitude Segments

For analytical purposes, variables were standardized to ensure that each variable had an equal weight in the analysis. For each respondent, data was centered to minimize differences in how individual respondents use rating scales.

Resulting means are centered around zero (0) so mean score is the distance from zero. A positive number indicates agreement with the statement; the higher the number, the greater the barrier (highlighted in red). A negative number indicates disagreement with the statement and implies that this is less of a barrier (highlighted in green). Bold indicates primary characteristics; non-bold indicates secondary characteristic (shared with other segment)

* Question was asked as a positive statement (buses are clean and comfortable) and reverse coded for analytical purposes to reflect all other negatively worded statements

Figure 89: Characteristics of Non-Rider Attitudinal Segments

The six Non-Rider segments are very similar demographically. Differences that exist (at the 90 or 95 percent confidence level) are highlighted in the adjacent table.

Image Conscious Segment

- The most likely segment to be employed (full-time, part-time, or self-employed)
- High percentage live in East King County
- Above-average percentage of recent Former Riders and also of long-ago former Riders; their primary purpose when they rode was to commute

Reliability Concerns Segment

- High percentage live in Seattle / North King County
- Above-average percentage of School Commuters
- Most likely segment to be recent former Riders

Safety Conscious Segment

- High percentage live in South King County
- More likely to be 55 and older
- Most affluent segment
- Above-average percentage of School Commuters
- Most likely segment to have never ridden; if they rode in the past, it was most likely for non-commute trips

Demographic Characteristics of Non-Rider Attitudinal Segments						
	Image Conscious (n = 228) (n_w = 346)	**Reliability Concerns** (n = 181) (n_w = 275)	**Safety Conscious** (n = 144) (n_w = 216)	**Difficult to Use** (n = 145) (n_w = 204)	**Limited Access** (n = 130) (n_w = 192)	**Comfort Concerns** (n = 126) (n_w = 187)
Area of Residence						
Seattle / N. King	20%	**29%**	19%	24%	21%	24%
South King	41%	35%	**50%**	44%	**51%**	41%
East King	**39%**	36%	32%	31%	28%	35%
Gender						
Male	48%	49%	51%	48%	51%	50%
Female	52%	51%	49%	52%	49%	50%
Age						
16–34	24%	24%	27%	24%	23%	24%
35–54	37%	36%	30%	31%	**46%**	34%
55 plus	39%	39%	**43%**	**45%**	32%	41%
Mean	49.0	48.5	49.0	50.1	47.8	48.6
Employment						
Employed Full-Time	**48%**	47%	40%	42%	40%	49%
Employed Part-Time	**6%**	9%	7%	12%	10%	7%
Self-Employed	**12%**	9%	11%	8%	12%	7%
Student (non-working)	3%	6%	5%	4%	4%	5%
Not Employed outside home	3%	5%	3%	2%	6%	3%
Retired	23%	20%	22%	25%	21%	21%
Unemployed / Other	5%	5%	**12%**	7%	6%	8%
Commuter Status						
Work Commuter	**57%**	53%	49%	53%	56%	**59%**
School Commuter	3%	**6%**	**6%**	4%	4%	2%
Non-Commuter	40%	41%	45%	43%	41%	39%

King County METRO

Difficult to Use Segment

- More likely to be 55 and older
- Higher percentage with incomes between $55,000 and $100,000
- Above-average percentage of recent Former Riders; if they rode it was more likely to be for non-commute trips

Limited Access Segment

- High percentage living in South King County
- More likely to be between the ages of 35 and 54, notably between 45 and 54
- High percentage with household incomes between $35,000 and $55,000 but also between $75,000 and $100,000

Comfort Concerns Segment

- Most likely segment to be Work Commuters
- Higher percentage with incomes between $55,000 and $100,000
- Most likely segment to be long-ago Former Riders who rode for commute trips

Demographic Characteristics of Non-Rider Attitudinal Segments						
	Image Conscious (n = 228) (nw = 346)	Reliability Concerns (n = 181) (nw = 275)	Safety Conscious (n = 144) (nw = 216)	Difficult to Use (n = 145) (nw = 204)	Limited Access (n = 130) (nw = 192)	Comfort Concerns (n = 126) (nw = 187)
Income						
< $35,000	22%	24%	24%	20%	20%	14%
$35,000-$55,000	16%	15%	16%	15%	**30%**	9%
$55,000-$75,000	19%	19%	12%	**21%**	3%	**24%**
$75,000-$100,000	11%	12%	11%	**21%**	24%	**24%**
$100,000 plus	32%	30%	**37%**	23%	23%	29%
Median	$69,576	$68,221	$72,256	$70,073	$62,079	$78,790
Access to Car						
% with Drivers' License	95%	94%	98%	98%	96%	96%
% with Vehicle	97%	96%	99%	99%	98%	99%
Mean # of Vehicles	2.1	2.1	2.3	2.2	2.3	2.3
Former Metro Use						
Within Last Year	**37%**	**40%**	35%	**38%**	31%	34%
1–5 Years Ago	22%	28%	24%	26%	29%	27%
>5 Years Ago	**32%**	23%	26%	25%	28%	**32%**
Never Ridden	9%	9%	**15%**	12%	12%	7%
Former Riders / Trip Type						
Former Commuters	**31%**	26%	19%	22%	28%	**35%**
Former Non-Commuters	69%	74%	**81%**	**78%**	72%	65%

Columns may sum to more or less than 100% due to rounding.

NON-RIDERS' POTENTIAL RIDERSHIP

Figure 90: Overall Appeal of Riding Metro for Commute and/or Personal Travel

Respondents were asked the appeal of using Metro for commute and/or personal trips. A combined variable was computed to represent the overall appeal of using Metro.

Overall one out of eight (12%) Non-Riders suggest that using Metro for commute and/or personal trips is very appealing. An additional 34 percent says it is somewhat appealing.

- The Reliability Concerns segment is the most likely segment to state that the idea of using Metro is very appealing.
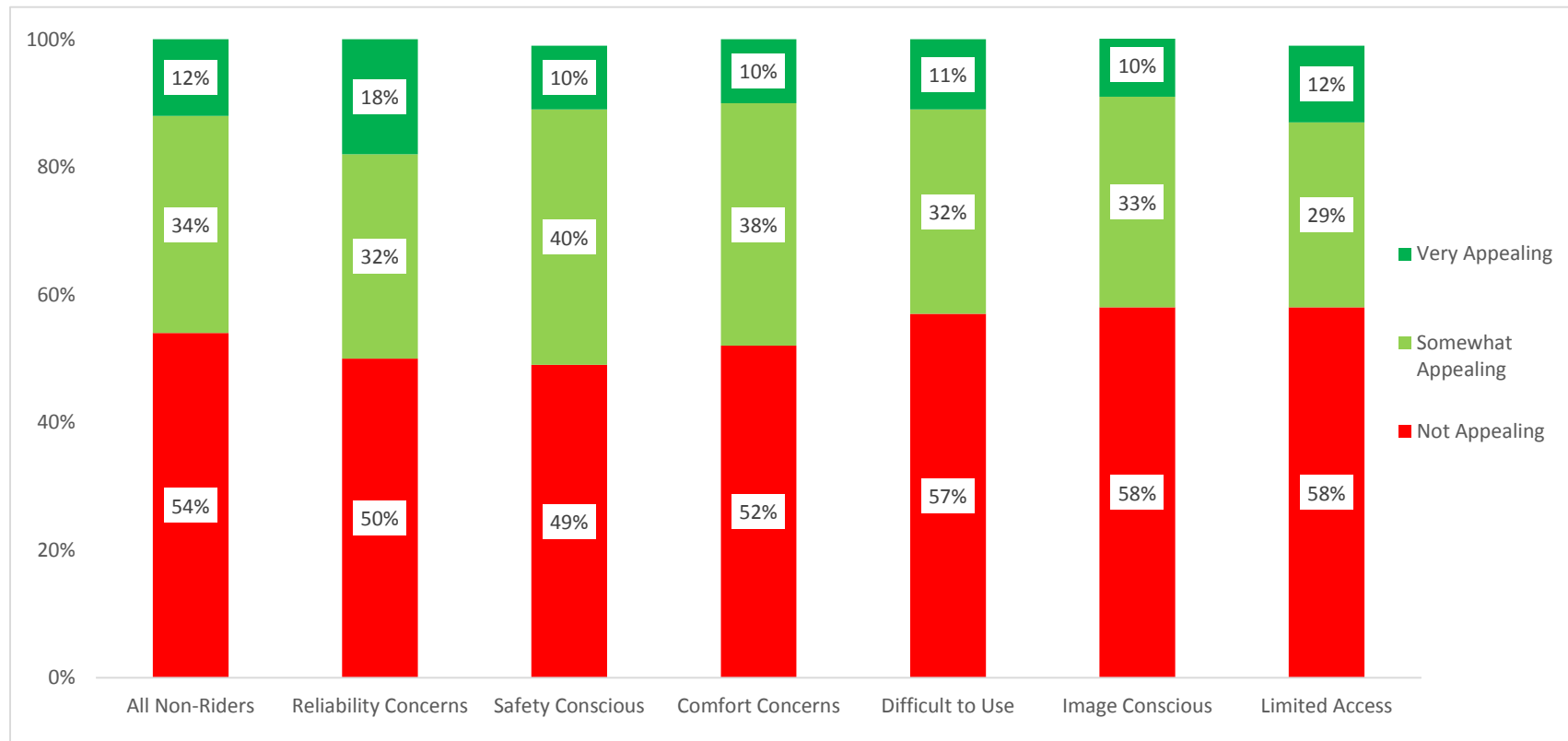
Question: C10A   Overall, how appealing to you personally is the idea of using Metro to get to [work/school]?

    PT2A   Overall, how appealing to you personally is the idea of using Metro for your personal travel?

    Base: Non-Riders who do not ride any local / regional transit system (n = 988) (n$_w$ = 1,477)

Columns may sum to more or less than 100% due to rounding.

Figure 91: Likelihood of Riding Metro for Commute and/or Personal Travel

Respondents were also asked their likelihood of using Metro for commute and/or personal trips. A combined variable was computed to represent overall likelihood of using Metro.

- The Reliability Concerns segment represents the greatest potential for ridership.

Question: C10A_1   If convenient transit service was available to where you work / go to school, how likely would you be to ride Metro?

PT2A_1   If convenient transit service was available to places you want to go for your personal travel, how likely would you be to ride Metro?

Question were asked of those who found idea of using Metro to get to work or school and/or personal travel appealing; rebased to include those who said it was not appealing and assumed that they would be unlikely to ride

Base: Non-Riders who do not ride any local / regional transit system (n = 988) (n_w = 1,477)

Columns may sum to more or less than 100% due to rounding.

DETAILED FINDINGS—OVERALL PERCEPTIONS OF AND GOODWILL TOWARDS METRO

New questions were added to gain further insights into Riders' and Non-Riders' perceptions of Metro beyond perceptions of service. These measures provide a measure of Metro's overall brand equity and associated goodwill.

Topic	What We Found	Key Stats				What It Means
Overall Perceptions of Metro	The majority of King County residents—both Riders and Non-Riders—have positive impressions of Metro. While direct experience with Metro leads to more positive impressions, the majority of Non-Riders are also generally positive.	**Overall Perceptions of Metro**				Metro has successfully built an overall image that is positive and that can be used to gain support for changes in policies or request for support in the future as it continues to grow and balance demands for service within increasingly constrained budgets.
			All King County	**Riders**	**Non-Riders**	
		Very Positive	18%	23%	14%	
		Positive	45%	48%	43%	
		Mixed	27%	24%	29%	
		Negative	10%	5%	14%	
External Influences	The majority of King County residents are hearing mixed (positive and negative) or generally negative comments about Metro. The impact of negative messages cannot be underestimated—more than one out of four residents hearing negative messages have negative overall perceptions of Metro. Similarly, 26 percent of Riders who hear negative things about Metro are dissatisfied.	**What Residents Hear About Metro – Word-of-Mouth and Media**				Working with the media and using social media to provide positive stories about Metro can counterbalance the highly publicized but generally isolated negative events on Metro. Getting a balanced message out will be very important going forward if Metro is forced to make significant service cuts.
			All King County	**Riders**	**Non-Riders**	
		Positive	45%	51%	41%	
		Mixed	28%	28%	27%	
		Negative	27%	21%	32%	
		Positive—Positive comments WOM and media *Mixed-Positive messages from one source / negative from other* *Negative—Negative message WOM and media*				

King County METRO

Topic	What We Found	Key Stats	What It Means
Relations with Metro	While residents have generally positive beliefs about the agency, the strength of these beliefs (that is the extent to which residents "strongly agree" with these statements) could be stronger.	**How Residents Relate to Metro % Strongly Agree** |	All King County	Riders	Non-Riders
Agency I Trust	38%	43%	35%
Agency I Like & Respect	36%	44%	31%
Agency I Like to Say I Ride		41%			Marketing communications, using traditional and non-traditional media, can be used to increase the extent to which residents relate to the agency.
Perceived Benefits	Residents feel that the key benefits of Metro are that you can do other things while riding and that riding Metro is good for the environment. Riders are more likely to strongly agree there are positive benefits to riding Metro.	**Perceived Benefits of Riding % Strongly Agree** |	All King County	Riders	Non-Riders
Can do other things	56%	71%	51%
Good for environment	50%	59%	44%
Can save a lot of money	40%	53%	31%
Less stressful than driving	37%	51%	28%		Promoting the positive benefits of being good for the environment while reducing stress will reach both Riders and Non-Riders.
Goodwill Index	A goodwill index was created, which is a weighted index of external influences, perceived benefits, and relations with Metro. Metro has a relatively high degree of goodwill as indicated by a goodwill index of 3.98 (on a five-point scale).	**Individual Contributors / Rating / Goodwill Index** 	Individual Contributors	Rating	Goodwill Index
---	---	---
Relations with Metro	4.04	
Perceived Benefits	4.08	3.98
External Influences	3.32			Metro has a reasonably strong reservoir of goodwill to build on. Stronger relations with the media could further enhance Metro's goodwill.

King County METRO

Topic	What We Found	Key Stats	What It Means
Brand Perceptions (Equity)	King County residents generally have a somewhat positive image of Metro (overall mean across the eight brand attributes = 3.98). They are most likely to agree that Metro is an industry leader, operates up-to-date equipment, and offers good value for the service they provide. While seen as an industry leader, perceptions of Metro as innovative are relatively low. Riders generally have more positive perceptions of Metro than do Non-Riders. Riders and Non-Riders have similar perceptions that Metro is socially and environmentally conscious and innovative.	(see table below)	There is potential to build additional support for Metro's programs and policies by telling a stronger story in the general community about what is does for the community as well as how well it serves its customers. The focus should be on those brand attributes that have the greatest impact on overall perceptions of Metro.

Brand Perceptions % Strongly Agree			
	All King County	**Riders**	**Non-Riders**
Leading agency	44%	**49%**	41%
Up-to-date equipment	40%	44%	38%
Good value for service	40%	**46%**	36%
Social / environment conscious	36%	38%	35%
Values its customers	37%	**46%**	31%
High quality standards	30%	**34%**	27%
Provides excellent service	29%	**37%**	24%
Innovative	21%	28%	16%

PERCEPTIONS OF METRO SERVICE

All respondents were asked a question to measure the extent to which Metro service meets or exceeds their expectations and the extent to which they are confident in Metro's ability to meet their expectations.

Figure 92: Expectations of Metro and Confidence in Service Delivery

Overall, King County residents have a positive impression of Metro. More than three out of five (63%) residents say they have high expectations and feel that Metro can deliver on those expectations.
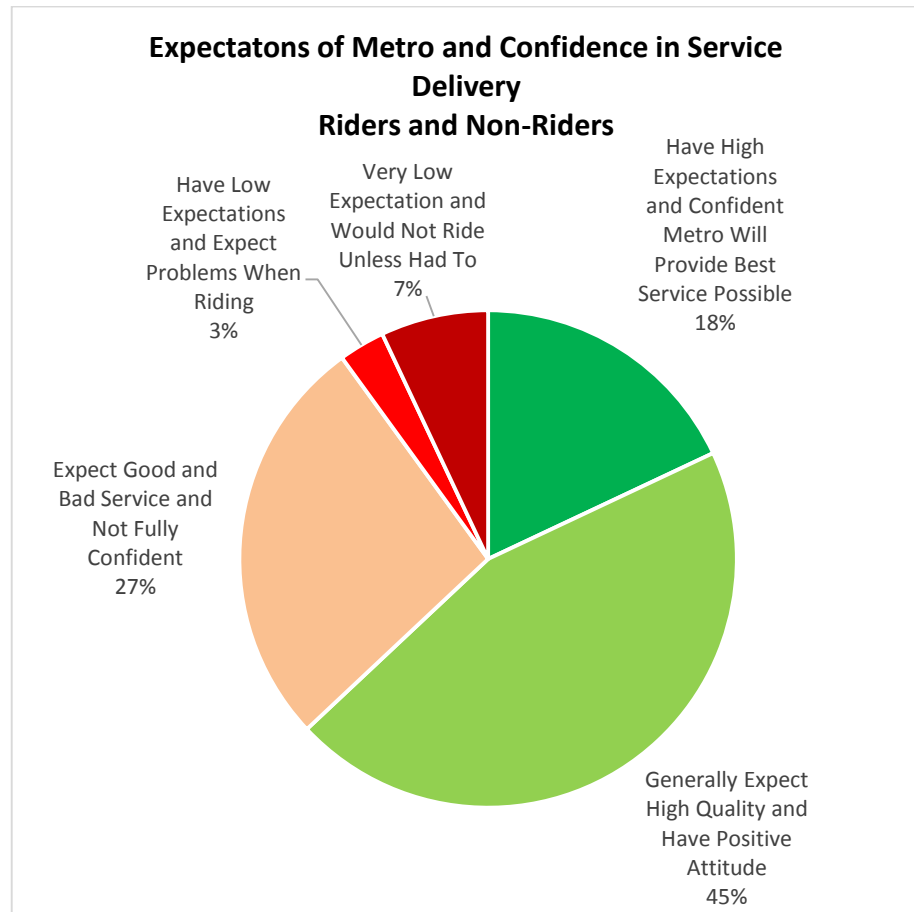
Expectatons of Metro and Confidence in Service Delivery
Riders and Non-Riders

- Have Low Expectations and Expect Problems When Riding 3%
- Very Low Expectation and Would Not Ride Unless Had To 7%
- Have High Expectations and Confident Metro Will Provide Best Service Possible 18%
- Expect Good and Bad Service and Not Fully Confident 27%
- Generally Expect High Quality and Have Positive Attitude 45%

Question GW7: Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?
Base: *All respondents (n = 2,414) (n_w = 2,414)*

Figure 93: Perceptions of Metro by Rider Status

Perceptions of Metro vary by experience riding, but not to the degree one might expect.

- Riders are more likely than Non-Riders to indicate that they have generally high expectations and have confidence in Metro's ability to deliver—71 percent compared to 57 percent, respectively. Non-Riders, on the other hand, are more likely to have mixed opinions—29 percent for Non-Riders compared to 24 percent for Riders.
- In addition, the more frequent the Rider, the higher the expectations and confidence in Metro's ability to deliver.
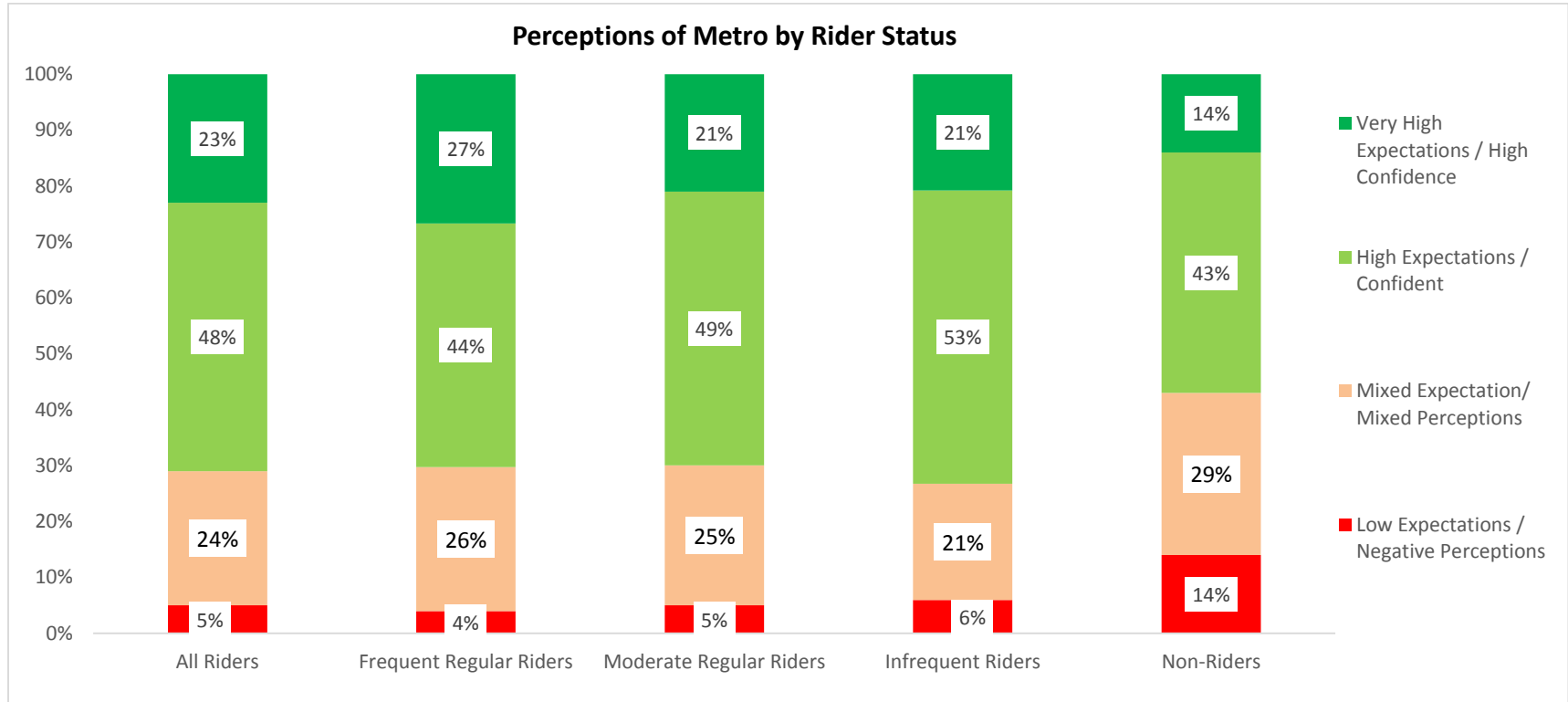
Perceptions of Metro by Rider Status

	All Riders	Frequent Regular Riders	Moderate Regular Riders	Infrequent Riders	Non-Riders
Very High Expectations / High Confidence	23%	27%	21%	21%	14%
High Expectations / Confident	48%	44%	49%	53%	43%
Mixed Expectation/ Mixed Perceptions	24%	26%	25%	21%	29%
Low Expectations / Negative Perceptions	5%	4%	5%	6%	14%

Question GW7: Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro.

Base: All Riders (n = 1,395) (n_w = 892); Frequent Regular Riders (n = 776) (n_w = 366); Moderate Regular Riders (n = 420) (n_w = 194); Infrequent Riders (n = 188) (n_w = 324); Non-Riders (n = 1,019) (n_w = 1,522)

Columns may sum to more or less than 100% due to rounding.

Figure 94: Perceptions of Metro by Area of Residence and Rider Status

Seattle / North King and South King County residents have the highest expectations for and confidence in Metro.

- This is due primarily to high degrees of confidence among Regular Riders in South and Infrequent Riders in Seattle / North King County.

When comparing the combined positive statements, those living in East King County have the most positive impressions.
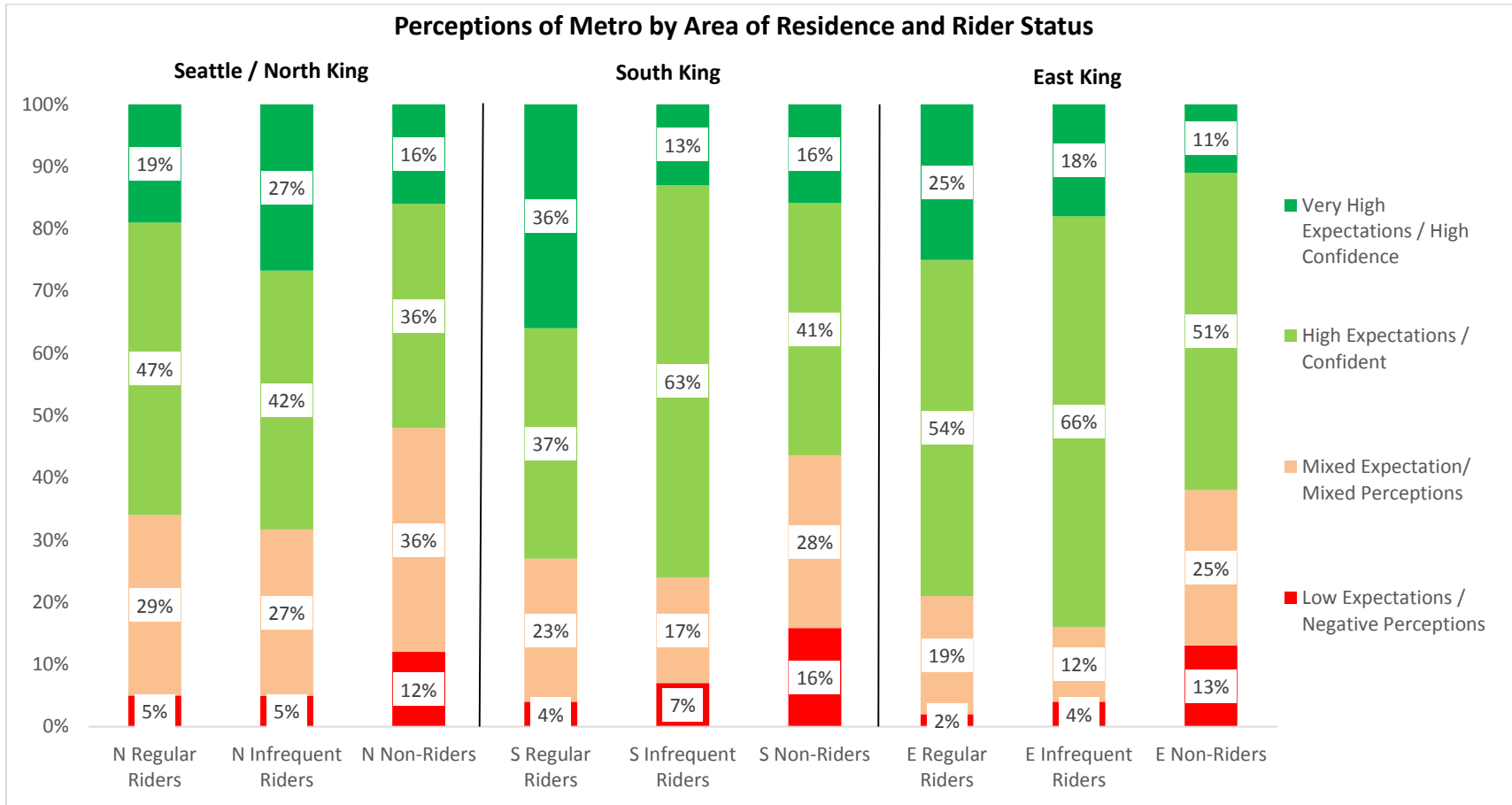
Question GW7: Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?

Base: All Riders (n = 1,395) (n_w = 892); Regular Riders (n = 776) (n_w = 366); Infrequent Riders (n = 188) (n_w = 324); Non-Riders (n = 1,019) (n_w = 1,522). See page 214 for detailed table of sample sizes.

Columns may sum to more or less than 100% due to rounding.

METRO'S BRAND EQUITY

The other half of the respondents were asked the extent to which they agree or disagree with statements describing Metro as an agency. These questions provide insights into the Metro "brand."

Figure 95: Perceptions of Metro (the Brand)

King County residents generally have a somewhat positive image of Metro (overall mean = 3.98, on a five-point scale).
- They are most likely to agree that Metro operates equipment that is up to date. They also general agree that Metro offers good value for the service it provides, is a leading transportation agency, is socially and environmentally responsible, and values its customers.
- They are least likely to agree that Metro is an innovative agency.

There are no significant differences in brand perceptions across the county.
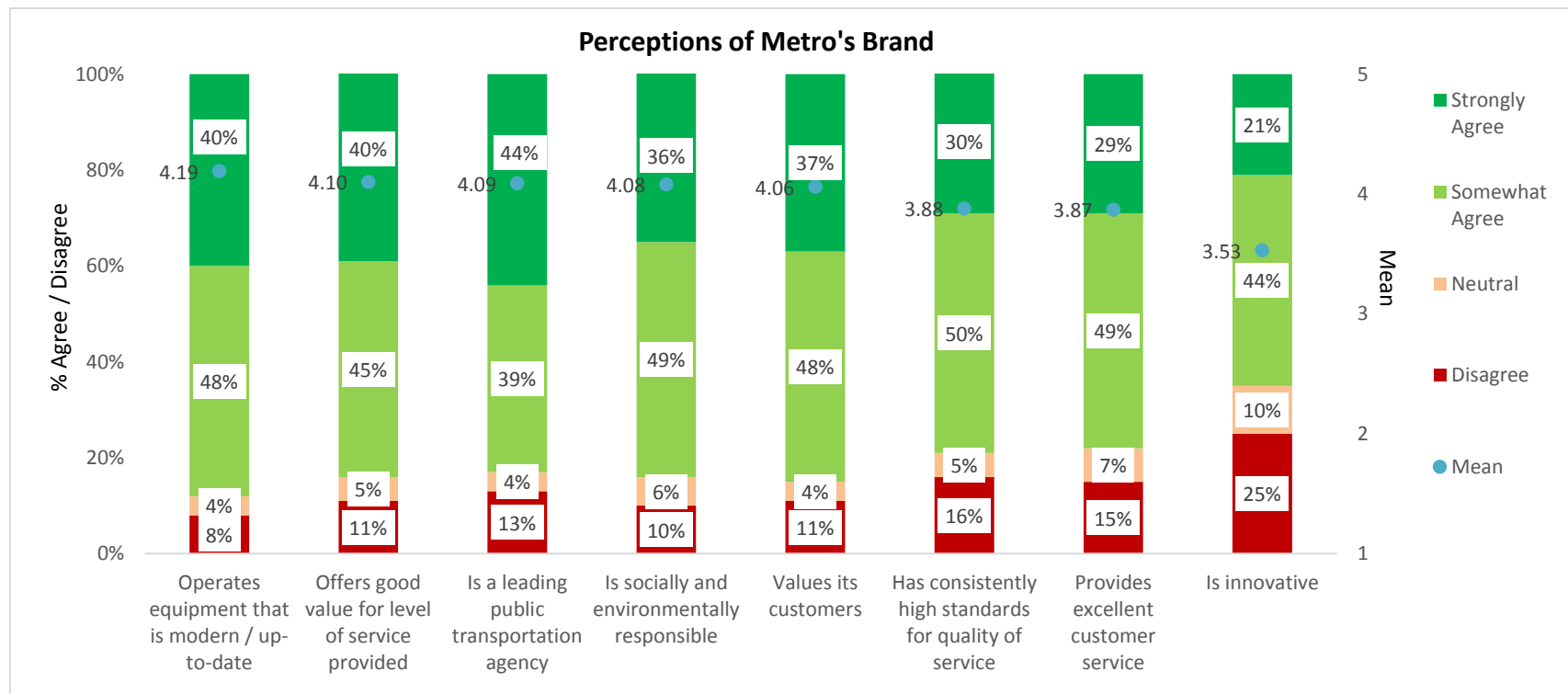
Question GW6: Do you agree or disagree with the folowing statements about Metro?

Base: Randomly selected group of all respondents (n = 1,200) (nw 1,221)

Columns may not sum to more or less than 100% due to rounding.; mean is based on five-point scale where "5" means "strongly agree" and "1" means "strongly disagree."

Figure 96: Perceptions of Metro (the Brand) by Rider Status

It is clear that direct experience with Metro has a positive influence on brand perceptions. Moreover, brand perceptions are relatively consistent across all Rider segments.

- Riders are significantly more positive than Non-Riders in terms of being perceived as offering good value for the level of service provided, valuing its customers, providing excellent customer service, and being innovative.
- The difference in opinions between Non-Riders and Riders is greatest for the belief that Metro is an innovative agency.
- The differences in these opinions is in part due to a higher percentage of neutral responses among Non-Riders for all attributes as well as a greater percentage of negative responses for innovation and value.

Infrequent Riders are distinct from both Regular and Non-Riders in their belief that Metro operates equipment that is modern and up to date.

Perceptions of Metro's Brand by Rider Status						
	All Riders (n=690) (n_w=431) (A)	Regular Riders (n=593) (n_w=273) (B)	Frequent Regular (n=386) (n_w=175) (C)	Moderate Regular (n=201) (n_w=93) (D)	Infrequent Riders (n=97) (n_w=158) (E)	Non-Riders (n=500) (n_w=789) (F)
Overall mean	4.09 (F)	4.09 (F)	4.09	4.10	4.08 (F)	3.92
Operates equipment that is modern and up-to-date	4.26	4.16	4.14	4.20	4.43 (BF)	4.15
Offers good value for level of service provided	4.23 (F)	4.26 (F)	4.23	4.30	4.17	4.03
Is a leading public transportation agency	4.15	4.17	4.16	4.18	4.12	4.06
Is socially and environmentally responsible	4.13	4.18	4.21	4.12	4.05	4.06
Values its customers	4.17 (E)	4.18 (E)	4.15	4.21	4.15	4.00
Has consistently high standards for quality of service it provides	3.97	4.03 (E)	4.00	4.06	3.87	3.83
Provides excellent customer service	4.02 (F)	4.03 (F)	4.05	3.96	4.02 (F)	3.77
Is innovative	3.76 (F)	3.74 (F)	3.74	3.74	3.80 (F)	3.40

Question GW6: Do you agree or disagree with the folowing statements about Metro?

Mean is based on 5-point scale where "5" means "strongly agree" and "1" means "strongly disagree"

Base: *Randomly selected group of all respondents (n = 1,200) (n_w 1,221)*

Overview

A random selection of half the respondents were asked the extent to which they agree or disagree with a series of statements that define the level of goodwill Riders and Non-Riders hold toward the agency. For the purposes of this research, goodwill toward Metro is a function of three primary factors. High levels of goodwill lead to greater support in the event of a controversy or negative event (such as weather). An agency with high goodwill can draw on this reservoir in the case of a negative event; while those with low goodwill have little or no support.
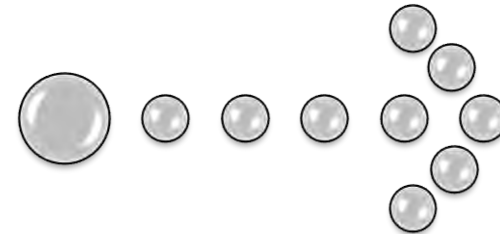
Goodwill—External Influences

External influences are the extent to which residents hear positive or negative things about Metro from family and colleagues and through the media. These two factors can have significant influences on customer and non-customer perceptions of Metro over which Metro has little or no control.

Figure 97: Extent to Which Residents Hear Good Things about Metro

As shown in the graph to the right, three out of five (61%) residents state that they generally hear good things about Metro from their friends and colleagues.

- However, twice as many somewhat agree than strongly agree.

Fewer (56%) state that they generally hear good things about Metro from the media.
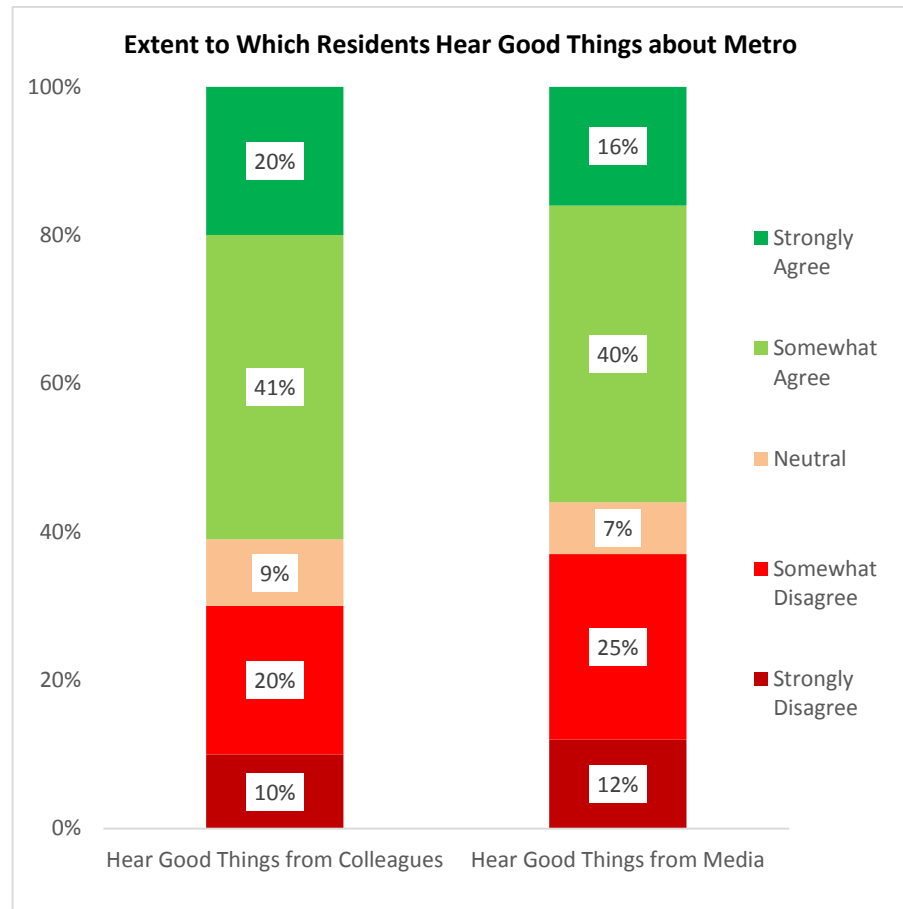
Extent to Which Residents Hear Good Things about Metro

	Hear Good Things from Colleagues	Hear Good Things from Media
Strongly Agree	20%	16%
Somewhat Agree	41%	40%
Neutral	9%	7%
Somewhat Disagree	20%	25%
Strongly Disagree	10%	12%

Question GW5: Do you agree or disagree with the folowing statements about Metro?
Base: Randomly selected group of all respondents (n = 1,159) (n_w 1,193)

Looking at the two influences combined, the table below shows that 45 percent of all King County residents generally hear good things about Metro from both sources.

On the other hand, 19 percent are generally hearing negative things, and 8 percent hear negative things from one source and neutral messages from the other. (For analytical purposes, these respondents are grouped with the negative influences segment.)

The balance (28%) generally hear mixed messages—16 percent hear neutral or good things from others but not from the media; 12 percent hear neutral or good things from the media but not from others.

Hear Good Things From the Media	Hear Good Things from Friends		
	Agree	Neutral	Disagree
Agree	45%	3%	9%
Neutral	2%	4%	2%
Disagree	14%	2%	19%
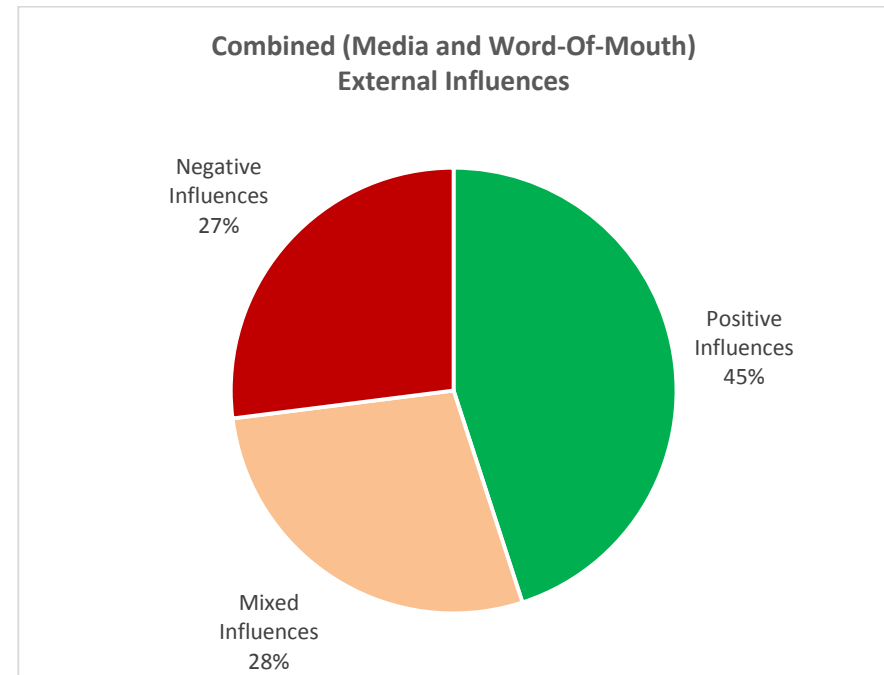
Combined (Media and Word-Of-Mouth) External Influences

Negative Influences 27%

Positive Influences 45%

Mixed Influences 28%

Question GW5: *Do you agree or disagree with the folowing statements about Metro?*
Base: *Randomly selected group of all respondents (n = 1,159) (n$_w$ 1,193)*

King County METRO

Figure 98: Influence of External Influences on Perceptions of Metro and Rider Satisfaction

The extent to which residents hear negative things about Metro clearly influences their overall perceptions of the agency.

- More than one out of four (26%) residents who hear negative things about Metro have low expectations of the agency and negative perceptions of how well it delivers service. An additional 45 percent have mixed expectations and perceptions.
- On the other hand, more than three out of four (77%) residents who hear positive things have positive expectations and impressions.

It also influences rider satisfaction.

- More than half (54%) of Metro Riders who hear positive things about Metro are very satisfied with riding; an additional 35 percent are somewhat satisfied.
- On the other hand, 26 percent of those who hear negative things about Metro are dissatisfied.
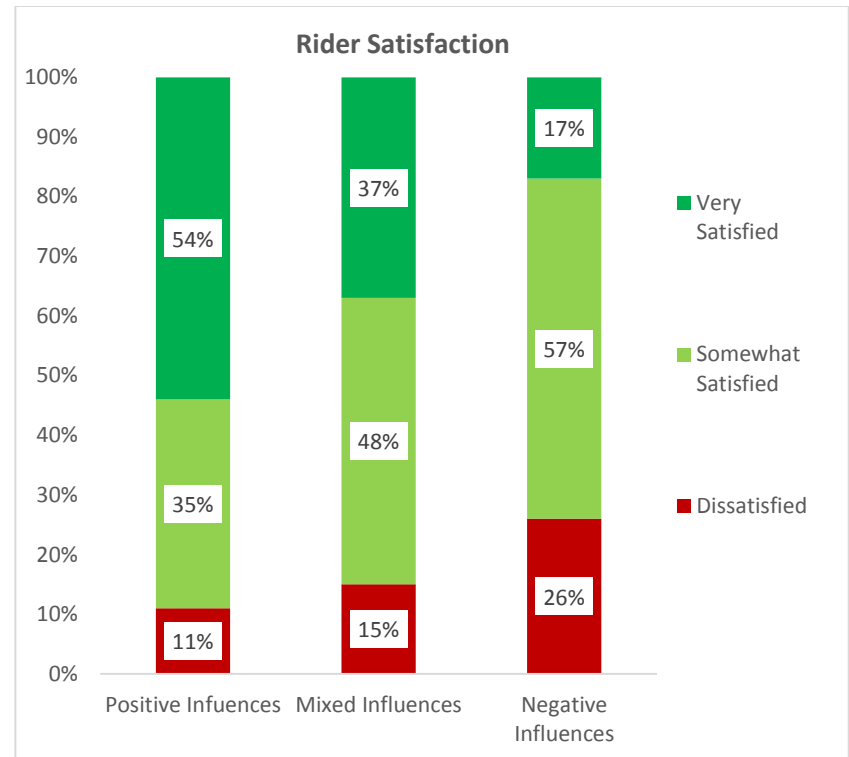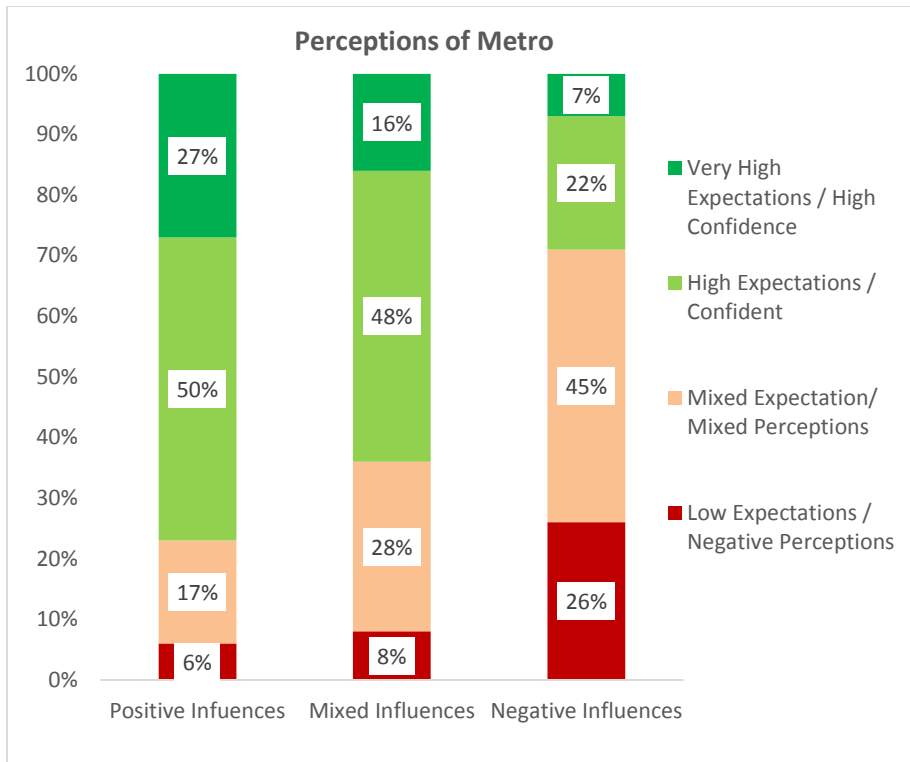
Question GW5: Do you agree or disagree with the following statements about Metro?
Question GW7: Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?
Base: Randomly selected group of all respondents (n = 1,159) (n_w 1,193)

Question GW5: Do you agree or disagree with the following statements about Metro?
Question GW1A: Overall, would you say you are satisfied or dissatisfied with Metro?
Base: Randomly selected group of all respondents (n = 1,159) (n_w 1,193)

Goodwill – Relations with Metro

Relations with the agency are a function of the extent to which residents trust and like or respect the agency and among Riders the extent to which they like to say they ride Metro.

Figure 99: Extent to Which Residents Trust and/or Like and Respect Metro

King County residents both trust and like and respect Metro.

Riders are significantly more likely to trust and like and respect Metro than Non-Riders.

Relations with Metro by Rider Status				
	All Riders (n=705) (nw=460) (A)	Regular Riders (n=614) (nw=294) (B)	Infrequent Riders (n=91) (nw=166) (C)	Non-Riders (n=509) (nw=733) (D)
Agency I Trust				
% Total Agree	90% (D)	92% (D)	88% (D)	77%
Strongly Agree	43% (D)	51% (CD)	30%	35%
Somewhat Agree	47%	41%	58% (BD)	42%
Agency I Like and Respect				
% Total Agree	91% (D)	91% (D)	88% (D)	77%
Strongly Agree	44%	52% (CD)	29%	31%
Somewhat Agree	47%	39%	59% (Bd)	46%

Relations with Metro

Question GW5: *Do you agree or disagree with the folowing statements about Metro?*
Base: *Randomly selected group of all respondents (n = 1,214) (nw 1,193)*

Figure 100: Extent to Which Riders Like to Say they Ride Metro

In general Riders like to say they ride Metro. This is noteworthy among Regular Riders. While also true for Infrequent Riders, their strength of agreement is less.
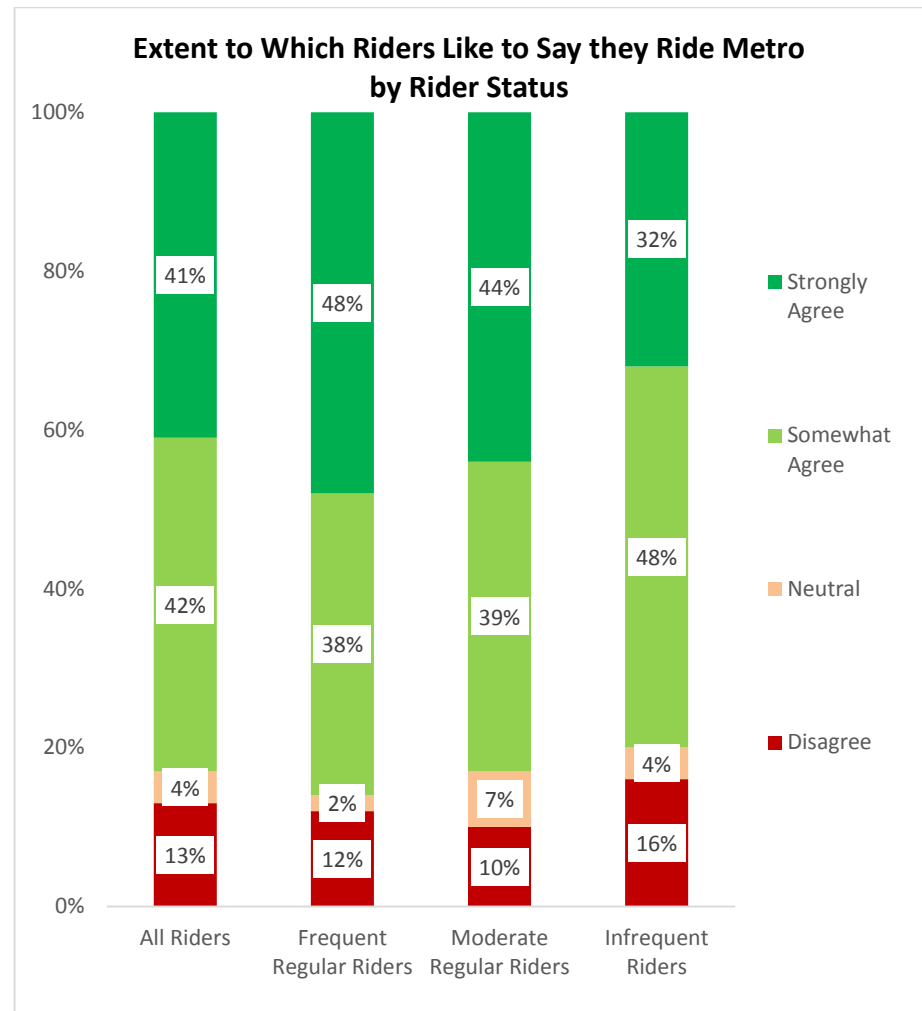
Extent to Which Riders Like to Say they Ride Metro by Rider Status

Question GW5: Do you agree or disagree with the folowing statements about Metro?
Base: Randomly selected group of all respondents (n = 1,214) (n$_w$ 1,193)

Figure 101: Influence of External Influences on Agency Relations

An overall Agency Relations Index was developed that represents a weighted average of two or, for Riders, three questions reflecting how residents relate to Metro (like and respect, trust, and for riders like to say they ride).

As with overall perceptions of and satisfaction with Metro (see page 173), external influences have a significant impact on Riders' and Non-Riders' relations with the agency.

Influence of External Influences on Agency Relations Index

Group	Primarily Positive External Influences	Mixed Influences	Primarily Negative External Influences
All Riders	4.52	4.15	3.52
Regular Riders	4.64	4.16	3.58
Infrequent Riders	4.29	4.09	3.39
Non-Riders	4.38	4.24	3.04
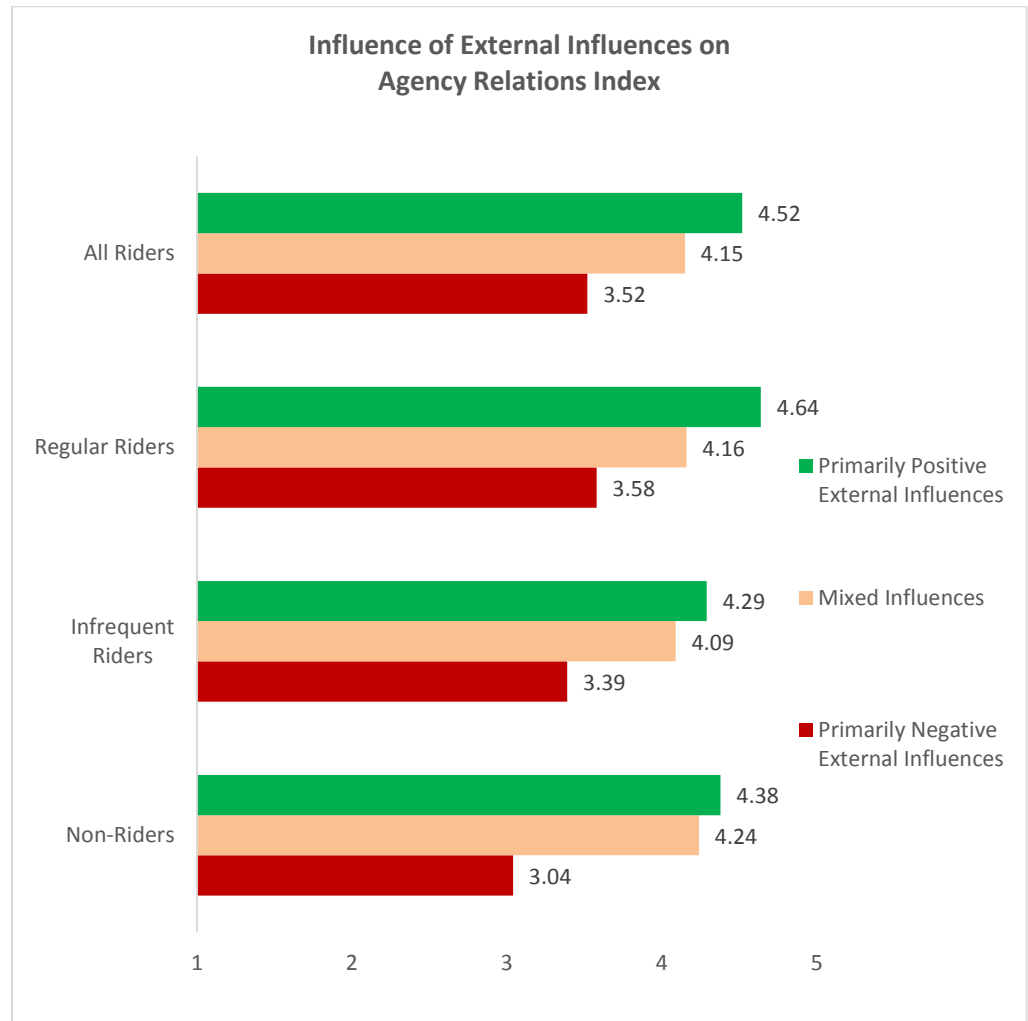
Mean is based on a five-point scale where "1" means "strongly negative agency relations" and "5" means " strongly positive agency relations"
Base: *Randomly selected group of all respondents (n = 1,159) (n$_w$ 1,193)*

Goodwill—Perceived Benefits

The final component of goodwill is the extent to which Riders and Non-Riders feel that Metro provides benefits to its customers and the community it serves.

Figure 102: Perceived Benefits of Metro

King County residents generally see that there are positive benefits to riding and for the community.

- They are most likely to agree that you can do other things when riding (i.e., it is not just dead time) and that when riding you are doing something good for the environment.
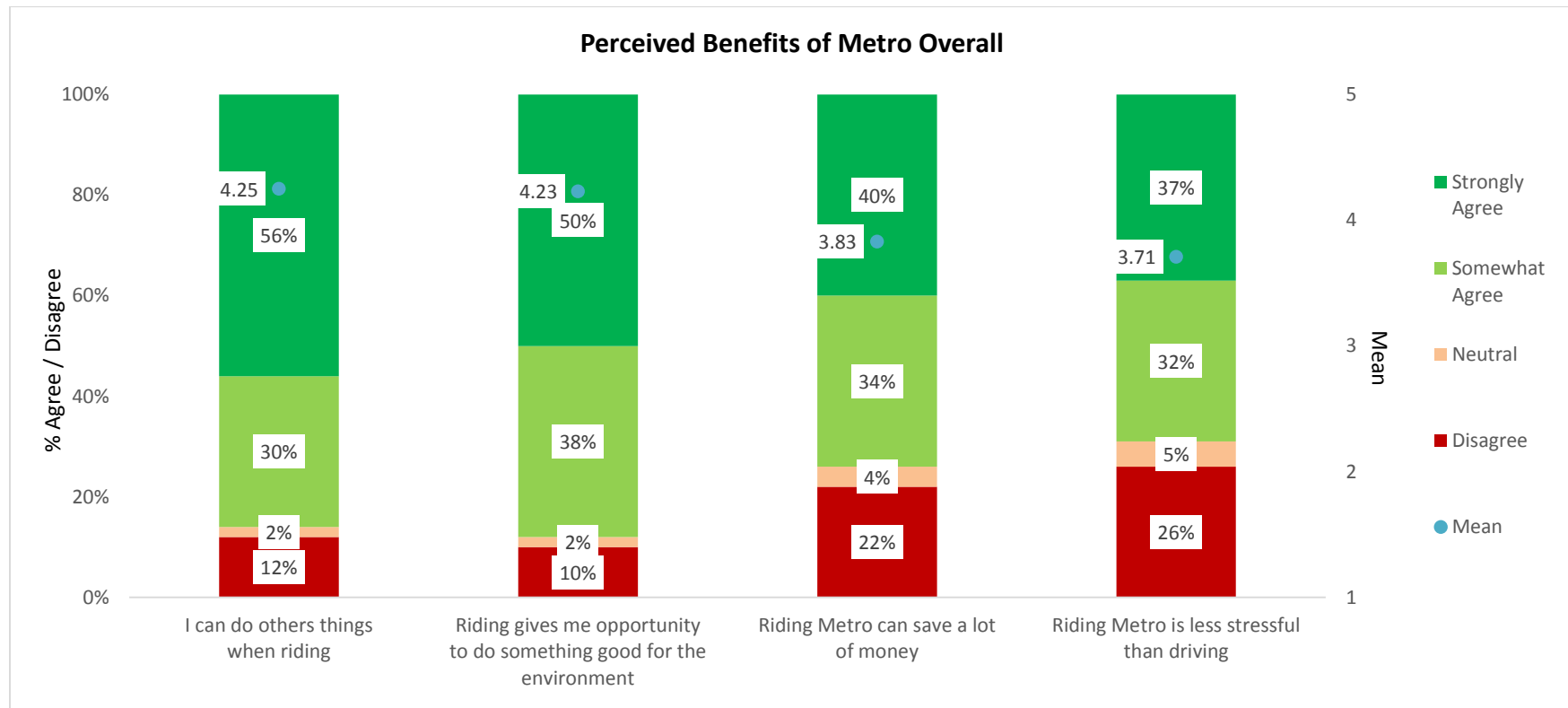
Perceived Benefits of Metro Overall

Statement	Disagree	Neutral	Somewhat Agree	Strongly Agree	Mean
I can do others things when riding	12%	2%	30%	56%	4.25
Riding gives me opportunity to do something good for the environment	10%	2%	38%	50%	4.23
Riding Metro can save a lot of money	22%	4%	34%	40%	3.83
Riding Metro is less stressful than driving	26%	5%	32%	37%	3.71

Question GW5: Do you agree or disagree with the folowing statements about Metro?

Base: Randomly selected group of all respondents (n = 1,214) (n_w 1,193)

Mean is based on five-point scale where "5" means "strongly agree" and "1" means "strongly disagree."

As would be expected, Regular Riders see greater benefits to riding Metro than do Infrequent Riders and Non-Riders.

- The differences in opinions are greatest for feeling that riding is less stressful than driving and that riding can save a lot of money.

Frequent Regular Riders also have more positive attitudes than do Moderate Regular Riders.

- In this case the difference in opinions is greatest for feeling that riding can save a lot of money.

Perceived Benefits of Metro by Rider Status					
	Regular Riders (n=614) (nw=294) (A)	Frequent Regular (n=390) (nw=191) (B)	Moderate Regular (n=219) (nw=101) (C)	Infrequent Riders (n=91) (nw=166) (D)	Non-Riders (n=509) (nw=733) (E)
	Mean (Based on five-point scale where "5" means "strongly agree" and "1" means "strongly disagree")				
Overall Mean	4.43 (DE)	4.51 (C)	4.26	4.16 (E)	3.79
Can do other things while riding	4.49 (DE)	4.56 (C)	4.33	4.21	4.16
Riding gives opportunity to do something good for the environment	4.52 (E)	4.58 (C)	4.40	4.45 (E)	4.05
Riding can save a lot of money	4.41 (DE)	4.53 (C)	4.18	4.05 (E)	3.54
Riding is less stressful than driving	4.30 (DE)	4.39 (C)	4.12	3.94 (E)	3.41

Question GW5: Do you agree or disagree with the folowing statements about Metro?

Base: Randomly selected group of all respondents (n = 1,214) (nw 1,193)

Goodwill—Metro's Goodwill Index

An overall Goodwill Index was computed. An index provides an easy-to-communicate and easy-to-replicate number that will inform internal discussions. Moreover, indices provide a powerful tool for tracking studies as they more accurately reflect actual changes over time than are evident when looking at fluctuations for individual variables.

Regression analysis was used to identify the impact of the variables in the model on overall perceptions of Metro. A two-stage process was used to compute the overall index.

1. Three sub-indices were developed to reflect the three individual components of the model—external influences, agency relations, and perceived benefits.
2. An overall index was then developed based on a weighted average of the three sub-indices.

Weights in the model reflect the derived standardized beta coefficients which represent the influence of each individual sub-index on the dependent variable (overall perceptions of Metro). Full documentation of the computations behind this index are provided to Metro separately from this report.

Agency relations has the greatest impact on overall perceptions of Metro followed by perceived benefits and external influences. External influences are less important to overall goodwill index than the other two factors.

- Metro has a relatively high degree of goodwill as indicated by a goodwill metric of 3.98 (on a five-point scale).

Figure 103: Metro Goodwill Index

Relations with Agency = 4.04

Perceived Benefits = 4.08

Metro's Goodwill Index = 3.98

External Influences = 3.32
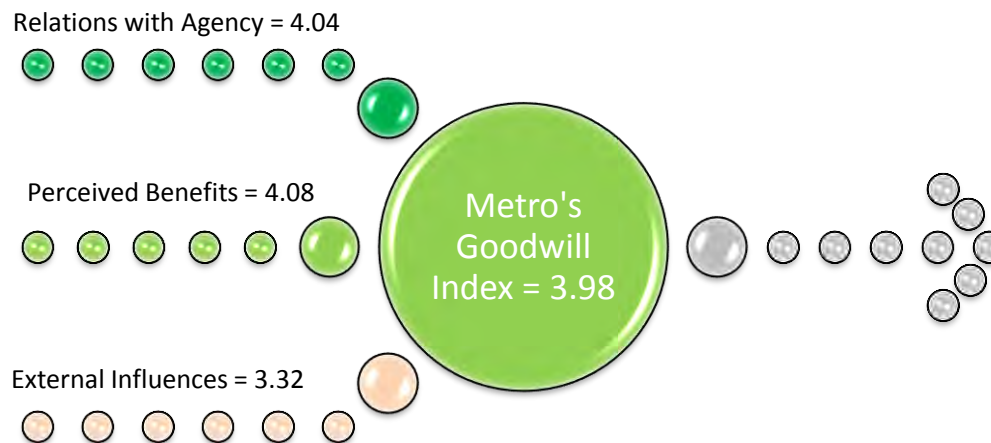
Figure 104: Goodwill Index by Rider Status and Residence Area

Metro's goodwill index is significantly higher among Regular and, to a lesser extent, Infrequent Riders than among Non-Riders.
While there are no overall differences in Metro's goodwill index by area of residence, there are key differences between respondent groups within the regions.

- In Seattle / North King County Regular Riders have a significantly higher goodwill index than Infrequent Riders, who in turn have a significantly higher goodwill index than Non-Riders.
- In South King County Regular Riders have a significantly higher goodwill than do Infrequent Riders and Non-Riders.
- The differences among Regular Riders, Infrequent Riders, and Non-Riders are not statistically significant in East King County.

Goodwill Index by Rider Status and Area of Residence

	All King County	Seattle / N. King	South King	East King
Regular Rider	4.20	4.17	4.24	4.25
Infrequent Rider	3.95	3.96	3.85	4.10
Non-Riders	3.88	3.77	3.84	4.01
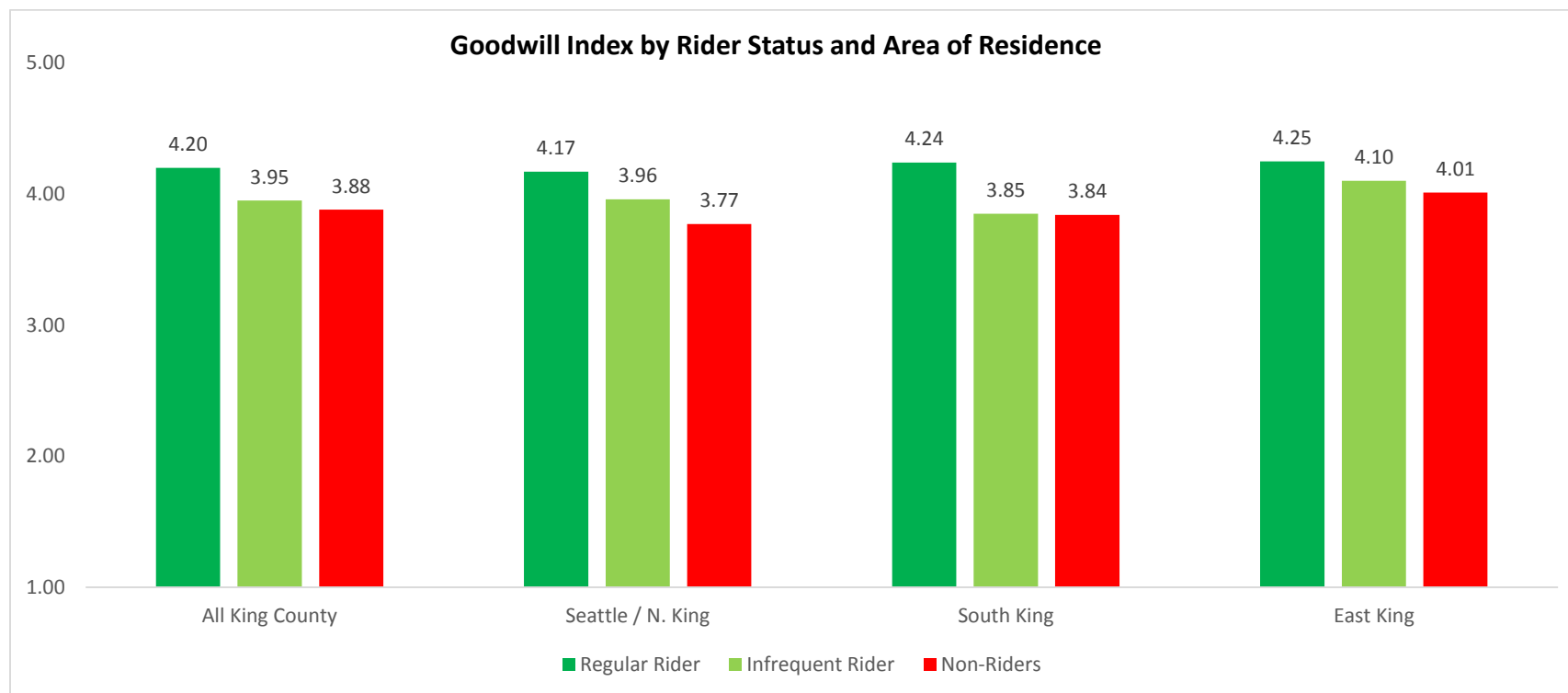
Base: Randomly selected group of all respondents
Mean is based on 5-point scale where "1" = "very low goodwill" and "5" = "very high goodwill"
All King County Regular Riders (n = 561) (n$_w$ = 275); Infrequent Riders (n = 77) (n$_w$ = 141); Non-Riders (n = 399) (n$_w$ =577)
Seattle / North King County Regular Riders (n = 192) (n$_w$ = 150); Infrequent Riders (n = 42) (n$_w$ = 65); Non-Riders (n = 122) (n$_w$ =157)
South King County Regular Riders (n = 194) (n$_w$ = 78); Infrequent Riders (n = 20) (n$_w$ = 48); Non-Riders (n = 137) (n$_w$ =228)
East County Regular Riders (n = 185) (n$_w$ = 47); Infrequent Riders (n = 15) (n$_w$ = 28); Non-Riders (n = 20) (n$_w$ =192)

SPECIAL TOPIC—DOWNTOWN SEATTLE

King County Metro worked with the Downtown Seattle Association to include questions in 2013 to look into Riders' and Non-Riders' travel to downtown Seattle and their perceptions of downtown.

Topic	What We Found	Key Stats	What It Means
Frequency of Travel	The majority of King County residents travel to downtown Seattle. Travel frequency varies significantly by area of residence.	**% Frequently / Sometimes go Downtown** All King County — 63% Seattle / North King — 75% South King — 55% East King — 61%	Much of the travel frequency to downtown Seattle is affected by proximity and the fact that many in Seattle / North King County also work downtown.
Downtown Image	Overall perceptions of downtown Seattle—safety during the day, cleanliness, and efforts to improve safety are positive.	**% Agree** Feel safe downtown during the day — 94% Safe to use transit during the day — 94% Cleanliness is improving — 66% Safety is improving — 55%	Daytime safety in downtown during the day is not a significant issue. While downtown commuters and visitors feel that efforts are clearly being made to improve downtown safety and cleanliness, there is clearly opportunity for further improvements, notably in terms of safety.
Downtown Safety	Perceptions of safety at night are mixed. Concerns about panhandling are also related to overall perceptions of downtown safety and nearly three out of five visitors to downtown Seattle agree that they make them feel uncomfortable.	**% Agree** Panhandlers make me uncomfortable — 58% Feel safe after dark — 55% Safe to use transit after dark — 58%	Continuing to work with Seattle police and the Downtown Business Association to monitor aggressive panhandling, notably after dark, should be a continued focus to encourage travel to downtown Seattle.
Downtown Parking	Those who travel to downtown Seattle are generally negative about parking. Availability is a greater issue than cost.	**% Agree** I don't go downtown because parking is expensive — 38% It is easy to find parking — 25%	Promoting use of transit to go downtown could increase travel. This could be accomplished by linking park-and-ride lots outside downtown with frequent and direct service into downtown and promoting this service.

FREQUENCY OF DOWNTOWN TRAVEL

Figure 105: Frequency of Travel to Downtown Seattle

More than three out five King County residents frequently (33%) or sometimes (30%) travel to downtown Seattle.

Frequency of travel varies by area of residence.

- Residents of Seattle / North King County are the most likely to travel downtown. This is due to some extent to the number of commuters living in Seattle / North King County who work downtown.
- Residents of South King County are the most likely to say they never go downtown.

Metro Riders, notably Regular Riders, are more likely than Non-Riders to go to downtown Seattle. Again this is due to some extent to the large number of Riders who work in downtown Seattle as well as the high percentage of Regular Riders living in Seattle / North King County.

Frequency of Travel to Downtown Seattle				
	All Riders (n=963) (nw=730) (A)	**Regular Riders** (n=815) (nw=446) (B)	**Infrequent Riders** (n=148) (nw=283) (C)	**Non-Riders** (n=854) (nw=1,321) (D)
Frequently	51% (D)	60% (CD)	37% (D)	24%
Sometimes	26%	20%	35% (B)	32% (AB)
Rarely / Never	23%	20%	28%	44% (ABC)

Frequency of Travel to to Downtown Seattle Overall and by Area of Residence
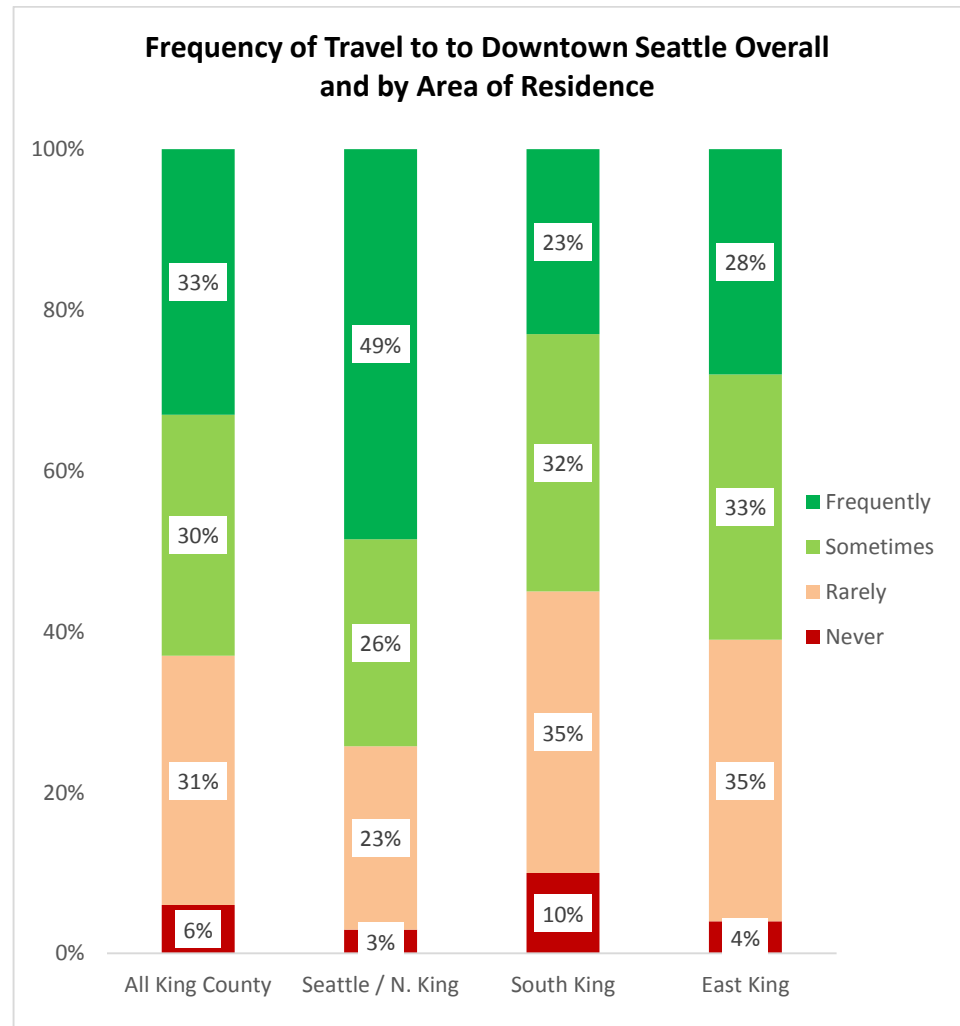
Question DTS1: How often do you go to downtown Seattle?
Base: All respondents (to minimize survey length, question was no longer asked after 600 Regular and 600 Infrequent / Non-Riders indicated that they sometimes or frequently go downtown)
Total (n=1,817) (nw=2,051); Seattle / N. King (n=611) (nw=682); South King (n=644) (nw=628); East King (n=562) (nw=541)
Columns may sum to more or less than 100% due to rounding.

PERCEPTIONS OF DOWNTOWN SEATTLE

Respondents who frequently or sometimes go to downtown Seattle were asked to indicate the extent to which they agree or disagree with nine statements about downtown Seattle. Factor analysis revealed three primary dimensions that reflect their perceptions of downtown Seattle. These factors are named based on the statements that were highly correlated with that factor.

Figure 106: Perceptions of Downtown Seattle

King County residents who go downtown are generally positive about downtown Seattle's image.

- Notably they agree that downtown Seattle is safe during the daytime and that both safety and cleanliness is improving.

Responses are more neutral when it comes to nighttime safety.

- Panhandlers are seen as a greater issue or concern than overall safety.

Those who go downtown are most negative about parking—notably the ease of finding parking.

Image		Safety		Parking	
Overall Mean	3.95	Overall Mean	3.01	Overall Mean	2.35
Statement	**% Agree Mean**	**Statement**	**% Agree Mean**	**Statement**	**% Agree Mean**
Cleanliness in downtown is improving	66% 3.48	Panhandlers do not make me feel uncomfortable*	39% 2.71	It is easy to find parking in downtown Seattle	25% 2.10
Safety in downtown is improving	55% 3.26	It is safe to use public transportation downtown after dark	58% 3.24	I do not avoid going to downtown Seattle because parking is too expensive	38% 2.62
I feel safe in downtown during the daytime	94% 4.48	I feel safe in downtown after dark	55% 3.10		
It is safe to use public transportation downtown in the daytime	94% 4.49				

Question DTS2: Do you agree or disagree with these statements about downtown Seattle? Do you strongly or somewhat agree / disagree?

Means are based on a five-point scale where "1" means "strongly disagree" and "5" means "strongly agree"; mean for overall factor is the average of the variables that loaded into the factor

* Question was asked as a positive statement (panhandlers make me feel uncomfortable) and reverse coded for analytical purposes to reflect all other positively worded statements

Base: *Respondents who frequently or sometimes go to downtown Seattle; to minimize survey length, question was no longer asked after 600 Regular and 600 Infrequent / Non-Riders*

Total (n = 1,207) (n_w = 1,296)

Downtown Seattle—Parking

Figure 107: Attitudes toward Parking in Downtown Seattle

Of those who come to downtown Seattle, three out of four (75%) respondents feel that is it difficult to find parking in downtown Seattle; nearly half (48%) strongly feel this way.

- This holds true for respondents from all parts of the county.
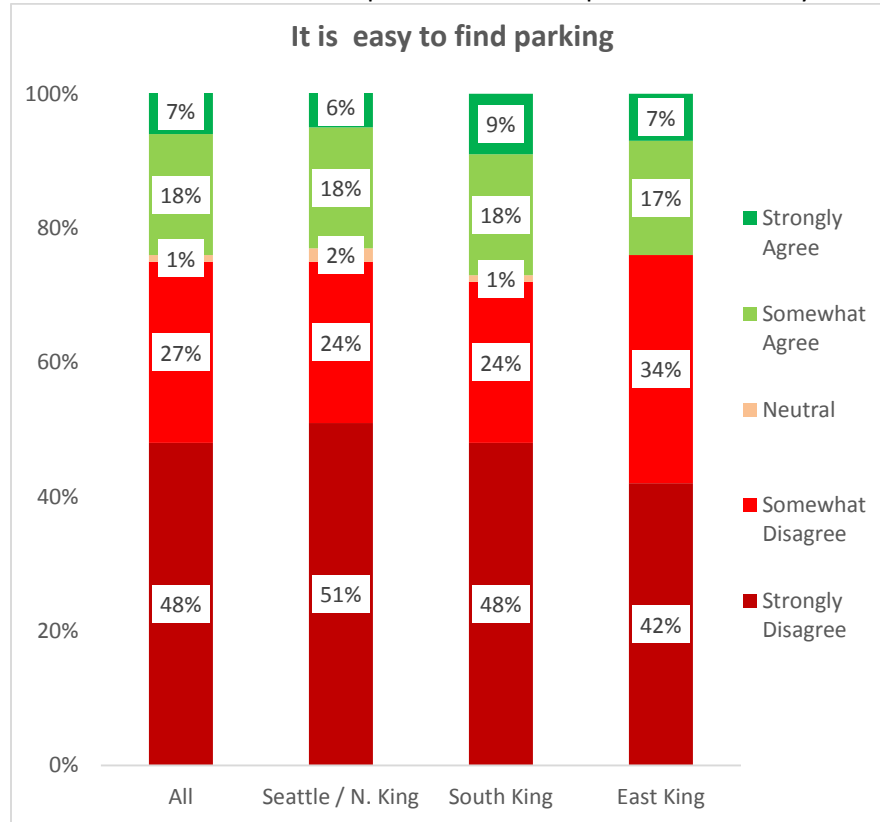
Three out of five (60%) respondents who go to downtown Seattle avoid going to downtown Seattle because they feel parking is too expensive.

- Those living in South King County are the most likely to avoid downtown Seattle because of the cost of parking.
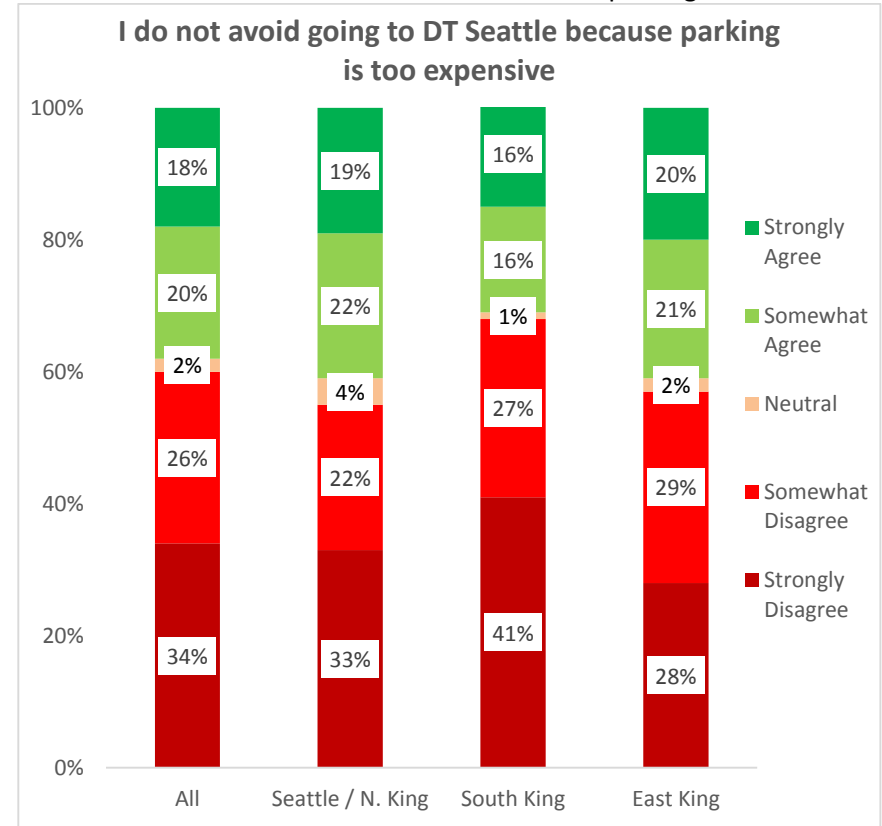
Question DTS2: Do you agree or disagree with these statements about downtown Seattle? Do you strongly or somewhat agree / disagree?

Base: Respondents who frequently or sometimes go to downtown Seattle; to minimize survey length, question was no longer asked after 600 Regular and 600 Infrequent / Non-Riders. Total (n = 1,207) (n$_w$ = 1,296); Seattle / N. King (n = 457) (n$_w$ = 509); South King (n = 392) (n$_w$ = 458); East King (n = 358) (n$_w$ = 329)

Columns may sum to more or less than 100% due to rounding.

Downtown Seattle—Image

Figure 108: Attitudes toward Downtown Seattle's Image: Improvements in Safety and Cleanliness

Two out of three (66%) respondents who come to downtown Seattle feel that cleanliness in downtown Seattle is improving; however, most somewhat rather than strongly agree.

- Those living in South King County are the most likely to agree that cleanliness is improving; those living in Seattle / North King County are more likely to disagree.

Compared to cleanliness, respondents who come downtown are less likely to agree that safety in downtown Seattle is improving; 55 percent agree and 32 percent disagree.

- As with cleanliness, those living in South King County are the most likely to feel it is improving while those living in Seattle / North King County are more likely to disagree.
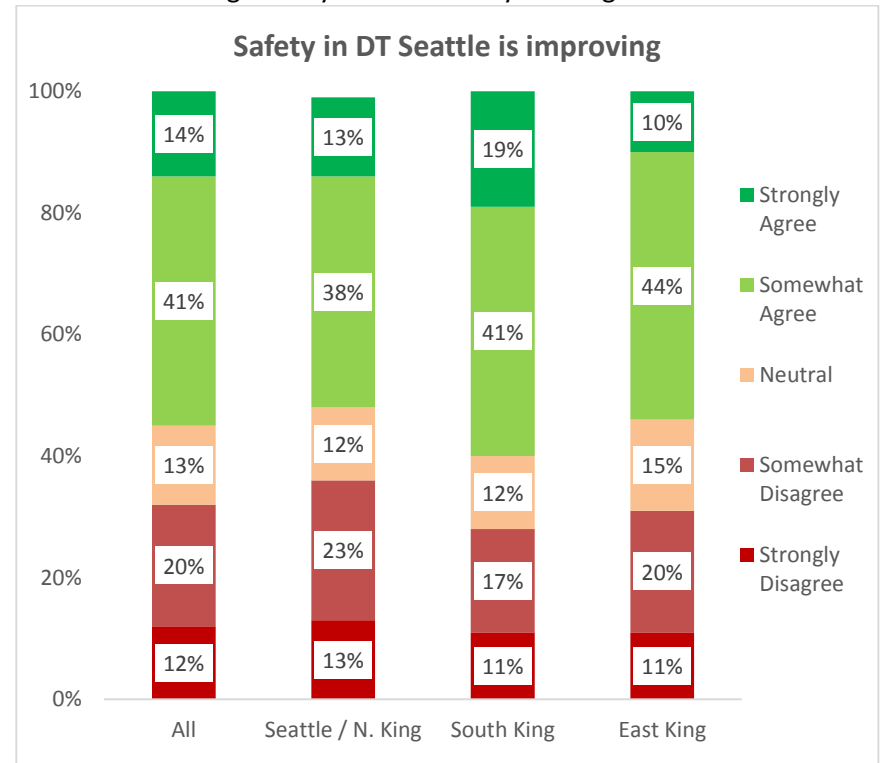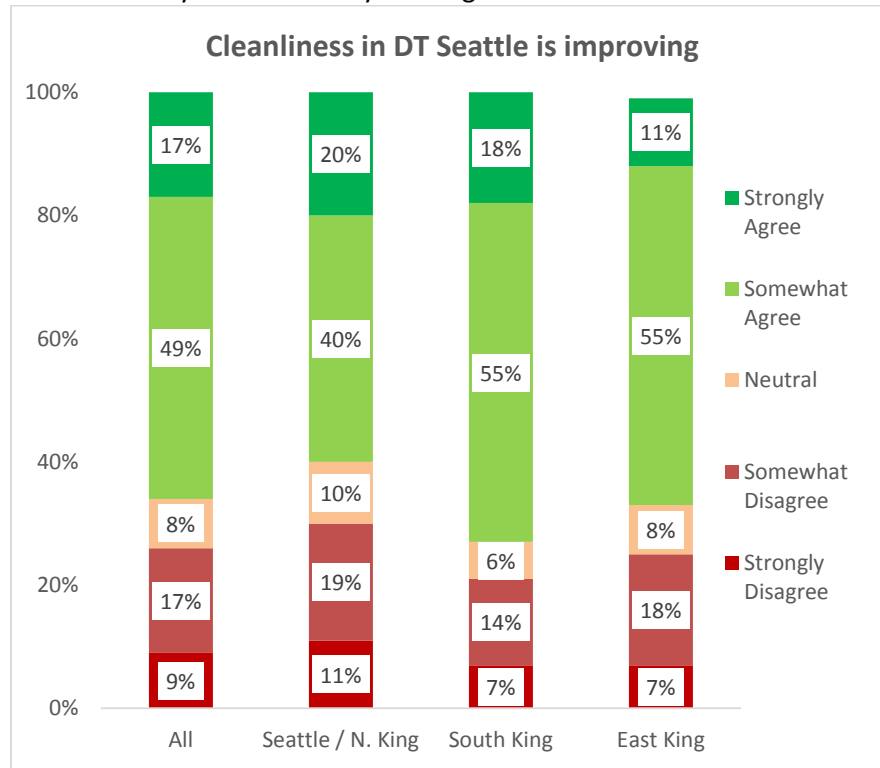
Question DTS2: Do you agree or disagree with these statements about downtown Seattle? Do you strongly or somewhat agree / disagree?

Base: Respondents who frequently or sometimes go to downtown Seattle; to minimize survey length, question was no longer asked after 600 Regular and 600 Infrequent / Non-Riders

Total (n = 1,207) (n$_w$ = 1,296); Seattle / N. King (n = 457) (n$_w$ = 509); South King (n = 392) (n$_w$ = 458); East King (n = 358) (n$_w$ = 329)

Columns may sum to more or less than 100% due to rounding.

Figure 109: Attitudes toward Downtown Seattle's Image: Daytime Safety

The majority (94%) of respondents who come downtown agree that they feel safe in downtown Seattle during the day; nearly three out of five strongly agree.

- Those living in East and, to a lesser extent, Seattle / North King County are the most likely to strongly agree with this statement. The views of those living in South King County are more mixed.

Respondents who come downtown also feel that it is safe to use public transportation in downtown Seattle during the day.

- Residents of Seattle / North King County are the most likely to strongly agree that they feel it is safe.
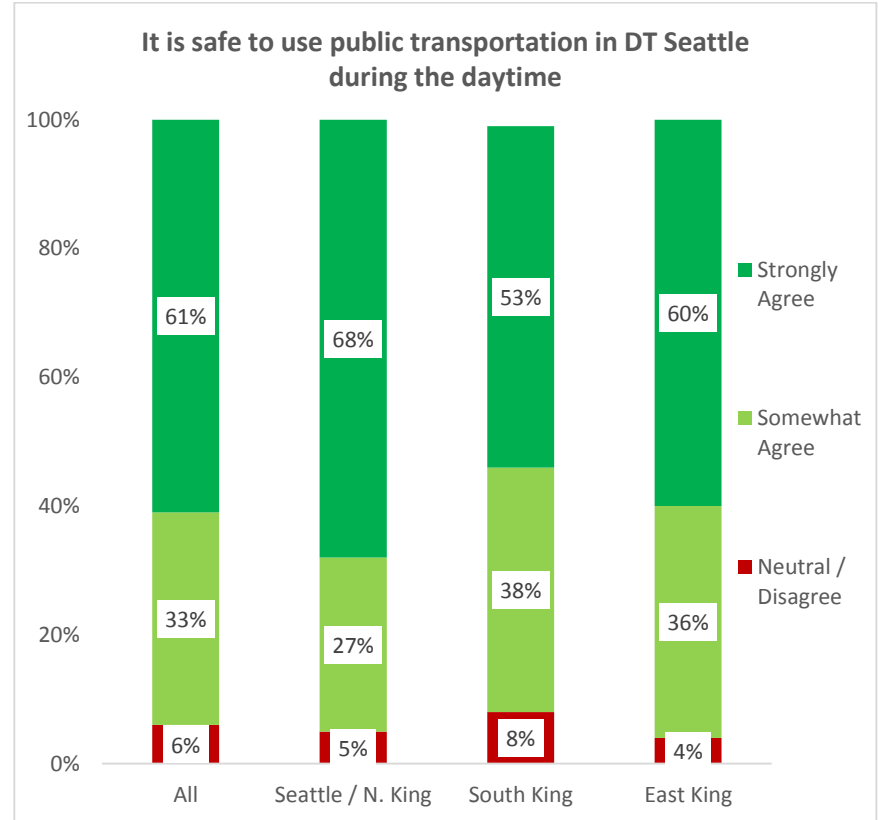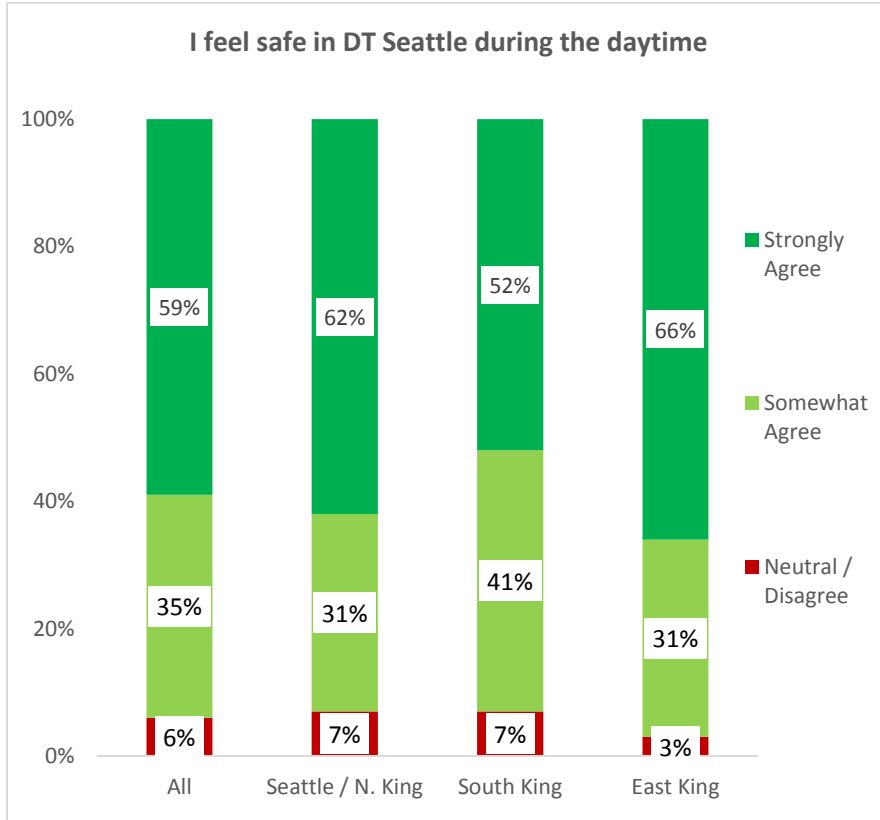
I feel safe in DT Seattle during the daytime

	All	Seattle / N. King	South King	East King
Strongly Agree	59%	62%	52%	66%
Somewhat Agree	35%	31%	41%	31%
Neutral / Disagree	6%	7%	7%	3%

It is safe to use public transportation in DT Seattle during the daytime

	All	Seattle / N. King	South King	East King
Strongly Agree	61%	68%	53%	60%
Somewhat Agree	33%	27%	38%	36%
Neutral / Disagree	6%	5%	8%	4%

Question DTS2: Do you agree or disagree with these statements about downtown Seattle? Do you strongly or somewhat agree / disagree?

Base: Respondents who frequently or sometimes go to downtown Seattle; to minimize survey length, question was no longer asked after 600 Regular and 600 Infrequent / Non-Riders

Total (n = 1,207) (n_w = 1,296); Seattle / N. King (n = 457) (n_w = 509); South King (n = 392) (n_w = 458); East King (n = 358) (n_w = 329)

Columns may sum to more or less than 100% due to rounding. Neutral combined with disagree; <1-2%.

Downtown Seattle—Safety

Figure 110: Attitudes toward Downtown Seattle's Safety: Nighttime Safety

Respondents who come downtown feel less safe in downtown Seattle after dark than in the daytime. However, the majority (55%) continue to agree that they feel safe.

- There are no differences in perceptions based on area of residence.

Respondents who come downtown also are more likely to say that using public transportation is less safe after dark than in the daytime.

- Residents of South King County have decidedly mixed views on the subject of the safety of public transportation downtown after dark.
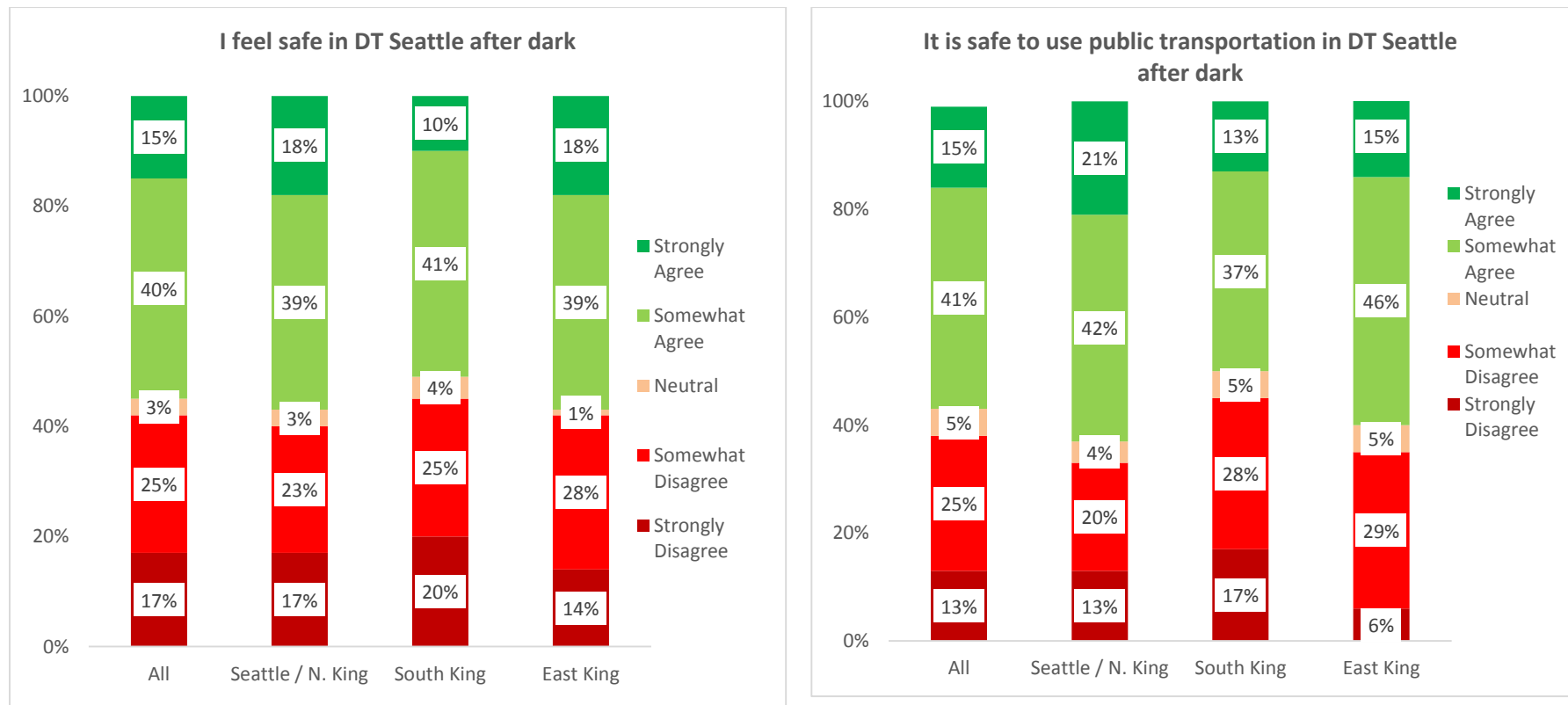
Question DTS2: Do you agree or disagree with these statements about downtown Seattle? Do you strongly or somewhat agree / disagree?

Base: Respondents who frequently or sometimes go to downtown Seattle; to minimize survey length, question was no longer asked after 600 Regular and 600 Infrequent / Non-Riders

Total (n = 1,207) (nw = 1,296); Seattle / N. King (n = 457) (nw = 509); South King (n = 392) (nw = 458); East King (n = 358) (nw = 329)

Columns may sum to more or less than 100% due to rounding.

Figure 111: Attitudes toward Panhandlers in Downtown Seattle

The majority of respondents who come downtown agree that panhandlers make them feel uncomfortable.

Panhandlers make me uncomfortable

- Strongly Disagree 15%
- Strongly Agree 25%
- Somewhat Disagree 24%
- Neutral 3%
- Somewhat Agree 33%
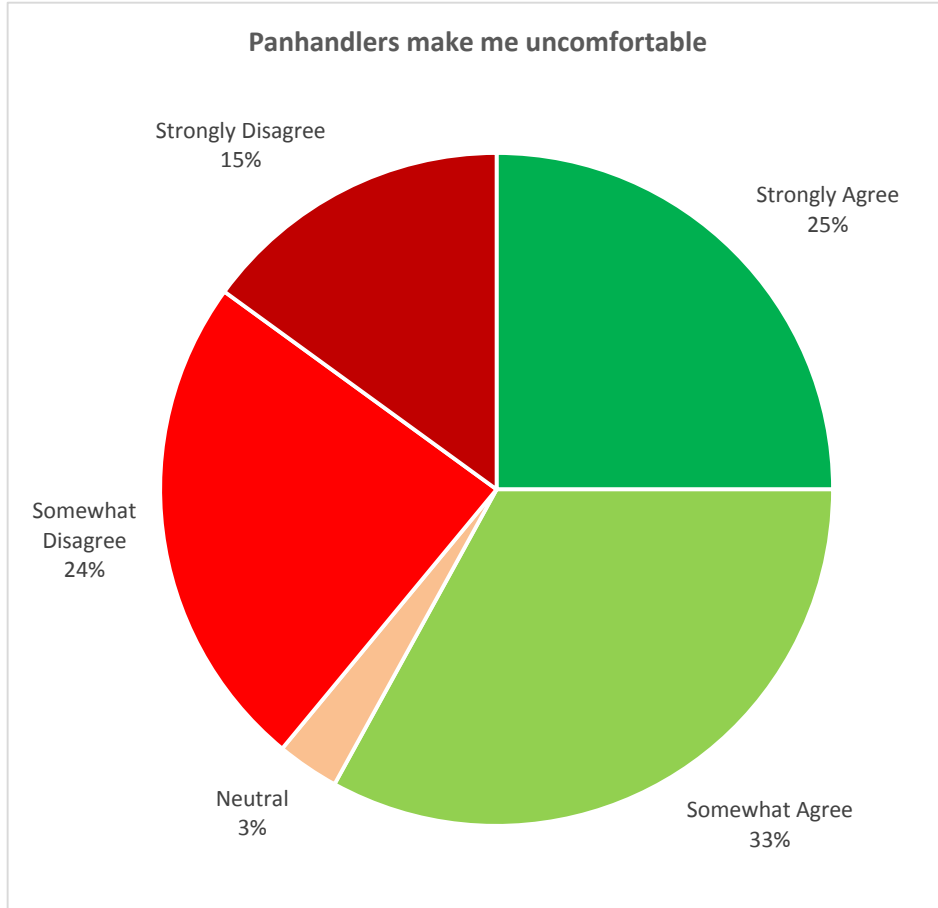
The extent to which respondents are uncomfortable with panhandlers is more highly correlated with their feelings of personal safety downtown after dark than with their feelings of personal safety during daytime hours.

- Nearly one-third (32%) of those who strongly agree that panhandlers make them uncomfortable strongly agree that they do not feel safe in downtown after dark.
- Conversely, just over one-third (36%) of those who strongly disagree that panhandlers make them uncomfortable strongly disagree that they do not feel safe.

I do not feel safe in downtown Seattle after dark	Panhandlers make me uncomfortable			
	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
Strongly Agree	**32%**	15%	11%	12%
Somewhat Agree	29%	32%	21%	10%
Somewhat Disagree	28%	42%	53%	38%
Strongly Disagree	9%	10%	14%	**36%**

Columns do not sum to 100%; neutral response not included

Question DTS2: Do you agree or disagree with these statements about downtown Seattle?

Base: Respondents who frequently or sometimes go to downtown Seattle; to minimize survey length, question was no longer asked after 600 Regular and 600 Infrequent / Non-Riders

Total (n = 1,207) (n_w = 1,296)

STRATEGIES

The detailed information available from this research as well as the use of advanced analytics provide insights that suggest strategies Metro could use to retain existing riders through a continued focus on customer satisfaction, building brand equity and goodwill among both Riders and Non-Riders, and attracting Non-Riders.

Segment / Strategy	Key Findings	Key Stats			What it Means
Riders— Continued Focus on Customer Satisfaction	Rider satisfaction with the level and reliability of service Metro provides, Rider safety, and information are the three greatest contributors to Riders' overall perceptions of and satisfaction with Metro. Riders are generally satisfied with the availability of information but express lower levels of satisfaction with the level and reliability of service and safety. Transferring and comfort while riding represents a second tier of factors contributing to Riders' overall perceptions of and satisfaction with Metro. Riders express lower levels of satisfaction with transferring and comfort while riding.	**Key Drivers--Overall**			Metro should focus its efforts on those overall dimensions of service that are most important and that receive lower satisfaction ratings:
			Derived Importance	**Satisfaction**	• **Level of service / reliability**: Most important dimension, average overall satisfaction
		Level / reliability of service	**0.21**	4.16	• **Safety**: Second most important dimension, below-average overall satisfaction
		Safety	**0.18**	4.13	• **Transferring**: Important dimension, lowest overall satisfaction rating
		Information	**0.15**	4.29	• **Comfort while riding**: Important dimension, below-average overall satisfaction
		Transferring	**0.12**	3.83	
		Comfort while riding	**0.11**	4.08	
		Drivers	0.08	4.52	
		Fare Payment	0.08	4.25	
		Comfort at stops	0.06	4.01	
		Park-and-Ride lots	0.03	4.28	
		Average	0.12	4.16	

Segment / Strategy	Key Findings	Key Stats	What it Means
	All aspects of safety are key drivers of Riders' overall perceptions of and satisfaction with Metro. Satisfaction ratings for nighttime safety are some of the lowest rated elements of service. While perceptions of daytime safety are relatively high (above 50% very satisfied), these ratings have been eroding over time. Perceptions of safety in the transit tunnel have also been eroding. With the exception of number of stops, all aspects of the level and reliability of service are important. Satisfaction with the elements of service contained within this dimension are generally average to slightly below average—43 percent to 51 percent satisfied. All individual aspects of service related to comfort on the bus are important. Ratings are generally average to slightly below average with overcrowding being a significant concern.	(see stats table below)	Metro should continue to focus a significant amount of their efforts to safety. This could include increased driver training to handle problems or incidents on the bus, greater police or security presence in the transit tunnel, at stops or in areas where there are known issues, and/or greater presence of police or other security measures on specific routes where there are known issues. To the extent possible, Metro should continue to focus efforts on improving current levels of frequency and on-time performance. Better scheduling of buses at major transit points and use of real-time information to inform Riders about transfers could improve perceptions of wait time when transferring. Increased service on heavily used routes, notable in Seattle / North King County, should be considered wherever possible.

Key Stats table:

	% Very Satisfied
Safety	
Nighttime safety riding	**30%**
Nighttime safety waiting	**31%**
Safety in the transit tunnel	**48%**
Daytime safety riding	**51%**
Daytime safety waiting	**63%**
Level / Reliability of Service	
Frequency of service	**45%**
On-time performance	**46%**
Availability of service	**51%**
Number of stops	51%
Information	
Postings of delays or problems	35%
Notification of service changes	**41%**
Accuracy of printed timetables	**44%**
Alerts via email or text	49%
Availability of printed timetables	**52%**
Availability of information online	**60%**
Overall ability to get information	**60%**
Transferring	
Wait time when transferring	**38%**
Number of transfers	**44%**
Comfort While Riding	
Overcrowding	**29%**
Inside cleanliness	**46%**
Availability of seating	**47%**
Ease of getting on / off bus due to crowding	**48%**
Lighting	**65%**

Bold text green indicates key driver (high importance) / above-average satisfaction

Bold text orange indicates key driver (high importance) / average satisfaction

Bold text red indicates key driver (high importance) / below-average satisfaction

King County METRO

Segment / Strategy	Key Findings	Key Stats	What it Means
Riders and Non-Riders— Increasing Goodwill	Metro has a relatively high reservoir of goodwill, notably among current Riders. The more frequently they ride, the greater the agency goodwill. Agency relations are the most important aspect of goodwill, and trust is the single most important aspect of agency relations. Perceived benefits are the second most important aspect of goodwill. Among Riders, less stress is the most important benefit. For Non-Riders, it is concern for the environment. While external influences is the least important aspect of goodwill, Metro's ratings are relatively low here for both Riders and Non-Riders.	**Goodwill**<table><tr><td>**Countywide**</td><td>**Riders**</td><td>**Non-Riders**</td></tr><tr><td colspan=3>**Overall Goodwill Index**</td></tr><tr><td>3.98</td><td>4.12</td><td>3.88</td></tr><tr><td colspan=3>**Agency Relations**</td></tr><tr><td>4.04</td><td>4.22</td><td>3.92</td></tr><tr><td colspan=3>**Perceived Benefits**</td></tr><tr><td>4.08</td><td>4.32</td><td>3.91</td></tr><tr><td colspan=3>**External Influences**</td></tr><tr><td>3.32</td><td>3.42</td><td>3.25</td></tr></table>	Metro should target building goodwill among less frequent Riders and Non-Riders. The focus for both Riders and Non-Riders should be on building trust in Metro's policies and confidence in the services they offer. Metro should use traditional media as well as its own social media network to counteract the negative publicity it receives by emphasizing its high quality standards, good value, customer focus, and innovative programs. Other communications could focus on the extent to which a significant number of King County residents rely on Metro even when they have alternative means of transportation, and providing profiles of its drivers and other key staff.

Segment / Strategy	Key Findings	Key Stats	What it Means
Riders and Non-Riders—Enhancing Brand	The two most important statements contributing to overall perceptions of Metro are the extent to which Metro: • Has high standards for quality of service • Offers good value for service provided Metro receives relatively high ratings for the value of service provided. On the other hand, Metro receives lower ratings for service standards. The agency receives the lowest ratings for innovativeness.	**Most Important Brand Attributes** 		Importance Rank	% Agree Describes Metro
---	---	---
High standards for service	1	30%
Offers good value	2	40%
Provides excellent service	3	29%
Is innovative	4	21%
Values its customers	5	37%
Is socially & environmentally conscious	6	38%		Metro should use traditional and new media to emphasize customer service orientation and innovation.
Non-Riders—Attracting Riders	Analysis identified six Non-Rider segments based on attitudes toward riding Metro. Of these, the Reliability Concerns segment represents the greatest potential for ridership. They are the most likely to suggest that riding the bus is appealing and state that they would be likely to ride if service is available from where they live to where they need to go. Many are former Riders and have generally positive impressions of Metro.	**Potential Ridership Non-Rider Attitudinal Segments** |	Riding is Appealing	Very Likely to Ride	% Positive
Reliability Concerns	50%	21%	60%
Limited Access	41%	17%	57%
Difficult to Use	43%	15%	61%
Comfort Concerns	48%	14%	56%
Image Conscious	42%	13%	60%
Safety Conscious	50%	12%	48%		With the exception of the Reliability Concerns segment, no single segment of Non-Riders stands out. Gaining a better understanding of the motivations behind mode choice, rather than attitudes toward transit, could provide greater insights into how to target Non-Riders—for example, what segments with which messages.

CONTINUED FOCUS ON CUSTOMER SATISFACTION

Metro has been very successful in recent years in growing ridership. At least some of this growth is attributable to the growing economy. However, customer retention is also key to this growth—88 percent of Metro Riders have been riding for at least one year; 65 percent have been riding for five or more years. A key component of this success has been and should continue to be a focus on two key areas:

- **Maintaining existing levels of service** for those elements of service that are **most important** to current customers and where satisfaction is **higher than average.**

- **Improving performance** for those elements of service that are **most important** to current customers and where satisfaction is **lower than average.**

Should resources permit, Metro could also **focus attention** on those strategic elements of service identified as less important but where satisfaction is lower than average.

Finally, Metro should continue to **monitor performance** in less important areas where customer satisfaction is high to ensure that performance does not fall below customer expectations, thereby making that area become more important.

Key Drivers Analysis is used to derive the importance of the individual elements of service.

Key Drivers—Overall

As discussed on page 100, analysis over the years has focused on nine overall dimensions of services on which customers base their overall satisfaction with and perceptions of Metro. A weighted index of overall satisfaction (Question GW1) and Rider perceptions of Metro (Question GW7) was developed to serve as the dependent variable.

Regression analysis was used to determine the extent to which each dimension contributes to weighted index. The first stage of the analysis identifies the relative importance of these nine dimensions of service as well as overall performance.

Figure 112: Level of Contribution of Each Service Dimension on Customer Index

Seven of the nine dimensions have a significant impact on customers' satisfaction with and perceptions of Metro. The three greatest contributors are:

- Level / reliability of service
- Safety
- Information

The second set of contributors are:

- Transferring
- Comfort while riding

While still significant contributors, less important are:

- Drivers
- Fare payment

Overall satisfaction with comfort while waiting and park-and-ride lots do not contribute significantly to customers' satisfaction with and perceptions of Metro.
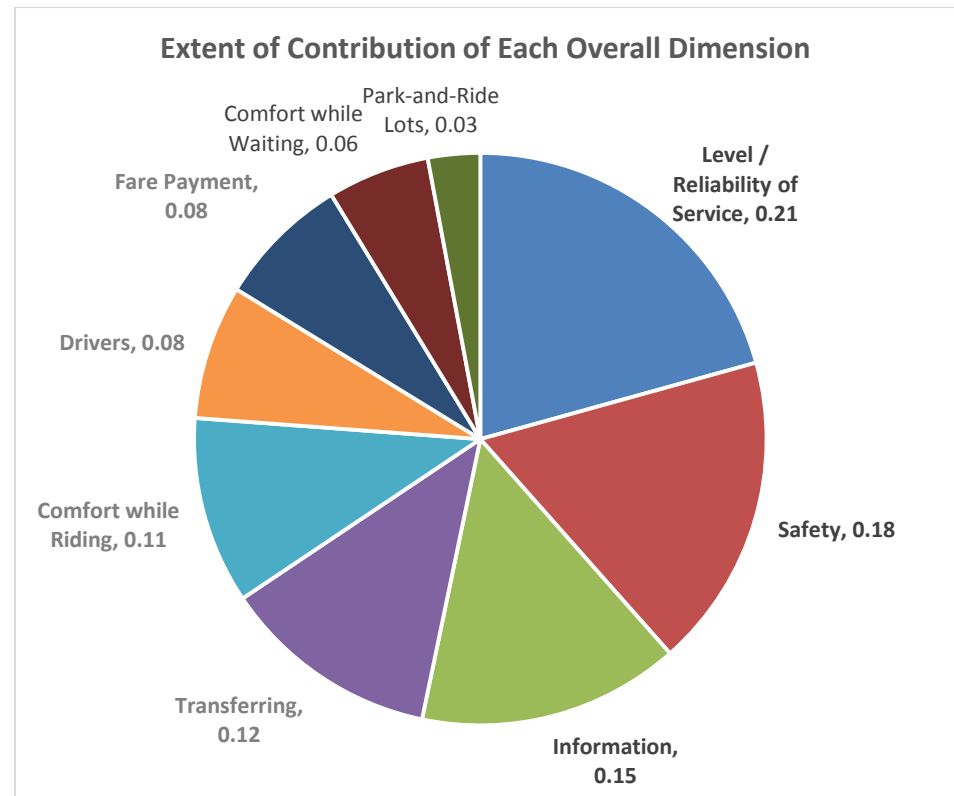
Extent of Contribution of Each Overall Dimension

- Park-and-Ride Lots, 0.03
- Comfort while Waiting, 0.06
- Fare Payment, 0.08
- Drivers, 0.08
- Comfort while Riding, 0.11
- Transferring, 0.12
- Information, 0.15
- Safety, 0.18
- Level / Reliability of Service, 0.21

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual dimension of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

Figure 113: Performance on Key Drivers

Metro's primary focus should be on improvements to:

- The level and reliability of service they offer
- Safety
- Transferring
- Comfort while riding

The analysis on the following pages identifies specific areas with each of these overall dimensions of service for improvement and maintenance.

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	Mean Rating		Mean Rating
Information	4.29	Level / Reliability of Service	4.16
		Safety	4.13
		Transferring	3.83
		Comfort while Riding	4.08
Low Importance / Above-Average Satisfaction Monitor		**Low Importance / Below-Average Satisfaction Strategically Target**	
	Mean Rating		Mean Rating
Fare Payment	4.54	Comfort at Stops *	4.01
Drivers	4.52		
Park-and-Ride Lots*	4.28		

Mean is based on five-point scale where "5" means "very satisfied" and "1" means "very dissatisfied."
Average mean across all dimensions is 4.29.
* Not a significant contributor

Key Drivers – Level / Reliability of Service

Figure 114: Key Drivers Analysis: Level / Reliability of Service

With the exception of number of stops, all individual service elements within the level / reliability of service dimension are significant drivers of overall satisfaction with and perceptions of Metro.

Metro's primary focus should be on improvements to:

- Frequency of Service
- On-Time Performance

Extent of Contribution of Individual Elements of Service in Level / Reliablity of Service Dimension

Number of Stops, 0.06

Travel Time, 0.11

On-Time Performance, 0.21

Frequency, 0.37

Availablity of Service to Where Need to Travel, 0.24

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
Availability of service to where need to travel	51%	Frequency of service	45%
		On-time performance	46%
Low Importance / Above-Average Satisfaction Monitor		Low Importance / Below-Average Satisfaction Strategically Target	
	% Very Satisfied		% Very Satisfied
Number of stops	51%	Travel time	43%

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual element of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

Key Drivers – Safety

Figure 115: Key Drivers Analysis: Safety

All individual elements of safety are key drivers of customers' satisfaction with and perceptions of Metro.

- Safety on the bus (as it relates to the conduct of other people) is somewhat more important than safety at stops.

- The statistical analysis suggests, daytime safety is more important than nighttime safety. However, this is because satisfaction with nighttime safety is more highly correlated with satisfaction with daytime safety than with customers' satisfaction with and perceptions of Metro. It is, therefore, safe to assume that nighttime safety is at least as important as daytime safety and is likely more important.

It is clear that Metro should continue to focus efforts on nighttime safety as well as refocus efforts to increase feelings of safety in the downtown transit tunnel.

Metro should also closely monitor daytime safety while riding as it will become a high-priority area if satisfaction falls below the 50 percent target and as discussed on page 110, Riders' satisfaction with daytime safety has eroded in recent years.

Extent of Contribution of Individual Elements of Service in Safety Dimension

Safety in Transit Tunnel, 0.22
Safety on the Bus, 0.42
Safety while Waiting, 0.36

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual element of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
Daytime safety waiting	63%	Nighttime safety riding	30%
Daytime safety riding	51%	Nighttime safety waiting	31%
		Safety in the transit tunnel	48%

Key Drivers—Metro Information Sources

Figure 116: Key Drivers Analysis: Metro Information Sources

The overall ease of getting information about Metro's route and schedules is by far the single most important aspect of information driving customers' satisfaction with and perceptions of Metro.

Looking only at the individual sources and types of information:

- Printed timetables are most important with accuracy of greater importance than availability.
- Notification of service changes is also highly important, followed by availability of information online.

Website postings of delays or service problems and notifications via email or text alerts have very limited impact, due to relatively low use.
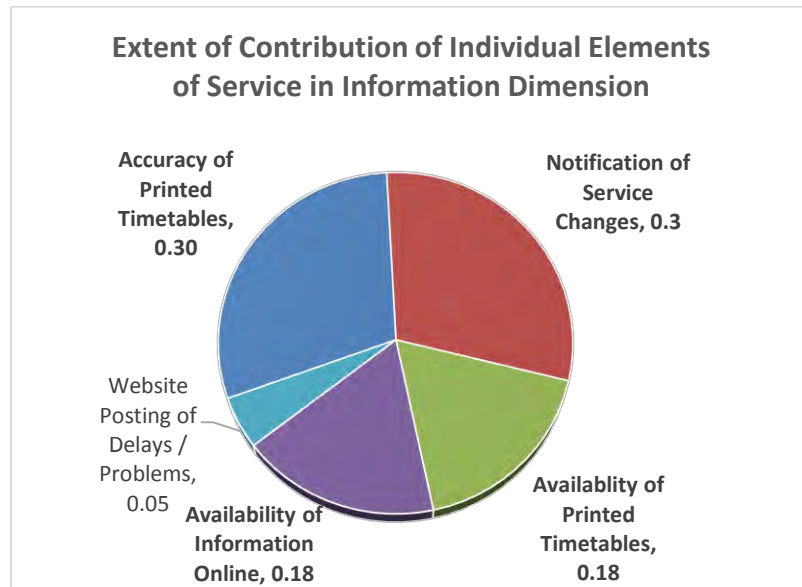
Providing customer notifications of upcoming service changes should be a key area of focus.

- As noted on page 77, the information should provide additional focus on reasons behind the service changes.

In addition, printed timetables should be regularly updated to ensure that the information is accurate.

Extent of Contribution of Individual Elements of Service in Information Dimension

Accuracy of Printed Timetables, 0.30
Notification of Service Changes, 0.3
Website Posting of Delays / Problems, 0.05
Availability of Information Online, 0.18
Availablity of Printed Timetables, 0.18

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual element of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
Overall ability to get information	60%	Accuracy of printed timetables	44%
Availability of information online	60%	Notification of service changes	41%
Ability to get printed timetables	52%		
Low Importance / Above-Average Satisfaction Monitor		**Low Importance / Below-Average Satisfaction Strategically Target**	
			% Very Satisfied
		Alerts via email / text	49%
		Website posting of delays / problems	35%

Key Drivers—Transferring

Figure 117: Key Drivers Analysis: Transferring

Both aspects of transferring are key drivers of customer satisfaction and overall perceptions of Metro.

- The number of transfers is somewhat more important than wait time when transferring.

Extent of Contribution of Individual Elements of Service in Transferring Dimension

Wait time When Transferring, 0.45

Number of Transfers, 0.55

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual dimension of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

Both elements of transferring should be considered a high priority for improvements, notably for routes serving South King County, which has a higher rate of transfers as well as longer wait times.
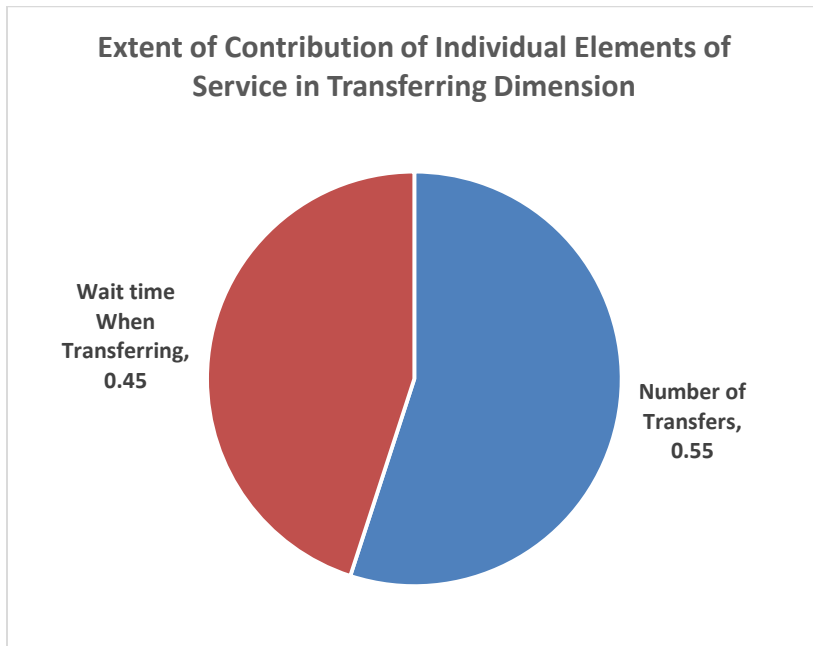
High Importance / Above-Average Satisfaction Maintain	High Importance / Below-Average Satisfaction Improve	
		% Very Satisfied
	Number of transfers	44%
	Wait time when transferring	35%

Key Drivers—Comfort on the Bus

Figure 118: Key Drivers Analysis: Comfort while Riding

All individual elements of service related to comfort on the bus are significant drivers of customers' overall satisfaction with and perceptions of Metro.

- Ratings of overcrowding and availability of seating are highly correlated, and for the purpose of the determining importance an average of these ratings is used.

With the exception of lighting on the bus, all aspects of comfort on the bus should be considered target areas for improvement.

Extent of Contribution of Individual Elements of Service in Comfort while Riding Dimension

Cleanliness, 0.31
Ease of Getting On/ Off Due to Crowding, 0.28
Average of Overcrowding & Availabilty of Seating, 0.22
Lighting, 0.19

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual element of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
Lighting	65%	Inside cleanliness	46%
		Availability of seating	47%
		Overcrowding	29%
		Ease of getting on / off bus due to crowding	48%

King County METRO

Key Drivers—Metro Drivers

Figure 119: Key Drivers Analysis: Drivers

Of the five individual elements for drivers, two are significant drivers of customers' satisfaction with and perceptions of Metro.

- Helpfulness of drivers with route and schedule information is by far the most important factor.

A new element—stopping and starting the bus smoothly—was added in 2013. This was not a factor at all because of its high correlation with safe and competent vehicle operation. Moreover, safe and competent operation of the vehicle is not seen as a significant contributor.
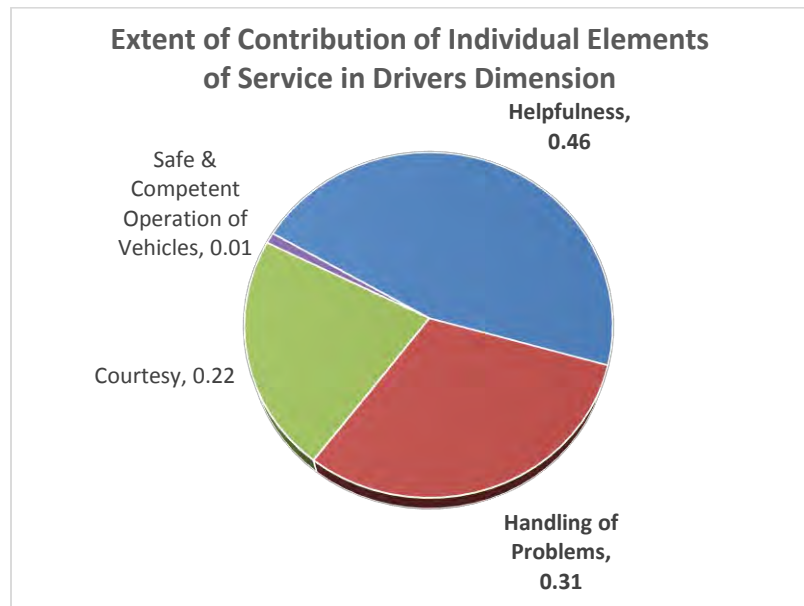
Metro drivers are clearly one of Metro's strengths, and the focus should be on maintaining two areas:

- Drivers' helpfulness in providing on-the-spot information on routes and schedules
- Effectively handling problems on the bus

Extent of Contribution of Individual Elements of Service in Drivers Dimension

- Helpfulness, 0.46
- Safe & Competent Operation of Vehicles, 0.01
- Courtesy, 0.22
- Handling of Problems, 0.31

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual element of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

High Importance / Above-Average Satisfaction Maintain	
	% Very Satisfied
Helpfulness of Drivers	64%
Effectively Handle Problems	64%
Low Importance / Above-Average Satisfaction Monitor	
	% Very Satisfied
Driver Courtesy	73%
Safe & Competent Operation of Vehicle	77%

Key Drivers—Fare Payment

Figure 120: Key Drivers Analysis: Fare Payment

Only three aspects of fare payment contribute to customer perceptions of and satisfaction with Metro. This is most likely due to the fact that only relatively small numbers of customers need to regularly load passes or added value to an E-Purse on their ORCA Card and that their satisfaction with these elements of service is more strongly correlated with their satisfaction with the ORCA Card than their general perceptions of and satisfaction with Metro.

The perceived value of service for the fare paid is the single greatest contributor to customer perceptions of and satisfaction with Metro.

As noted in earlier discussions, Riders are very satisfied with all aspects of fare payment, and Metro should continue to be a leader in this area.
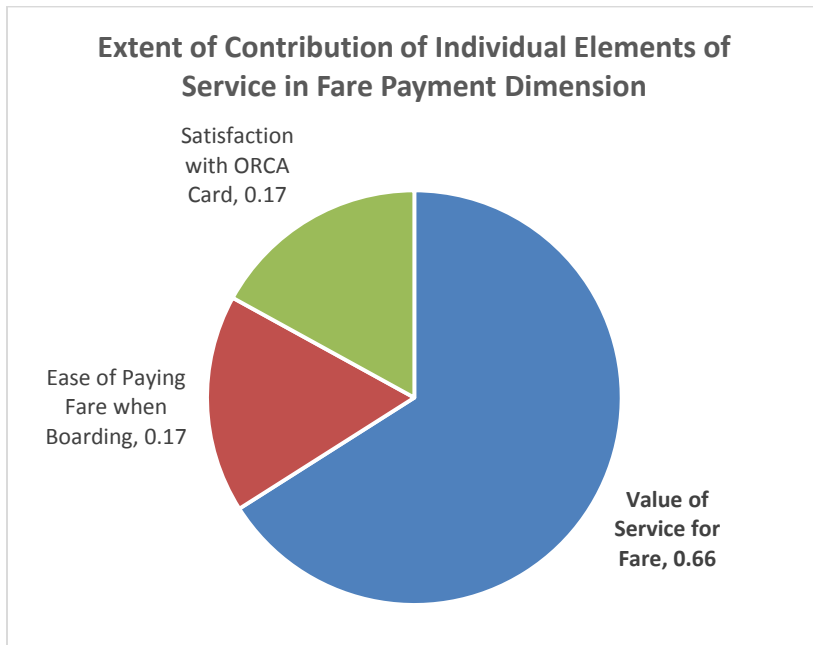
Extent of Contribution of Individual Elements of Service in Fare Payment Dimension

Satisfaction with ORCA Card, 0.17

Ease of Paying Fare when Boarding, 0.17

Value of Service for Fare, 0.66

High Importance / Above-Average Satisfaction Maintain	
	% Very Satisfied
Value of Service	62%
Low Importance / Above-Average Satisfaction Monitor	
	% Very Satisfied
Satisfaction with ORCA Card	83%
Ease of Paying Fares when Boarding	76%

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual element of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

Key Drivers—Comfort while Waiting

Figure 121: Key Drivers Analysis: Comfort while Waiting

Overall, comfort at stops is not a key driver of customers' satisfaction with and perceptions of Metro. However, three aspects of comfort at stops have some influence on overall satisfaction with and perceptions of Metro.

- Availability of seating at stops
- Ease of getting on and off the bus due to crowding
- Distance from home to stop

The remaining four factors are not significant contributors. Lighting at stops did not factor in at all.
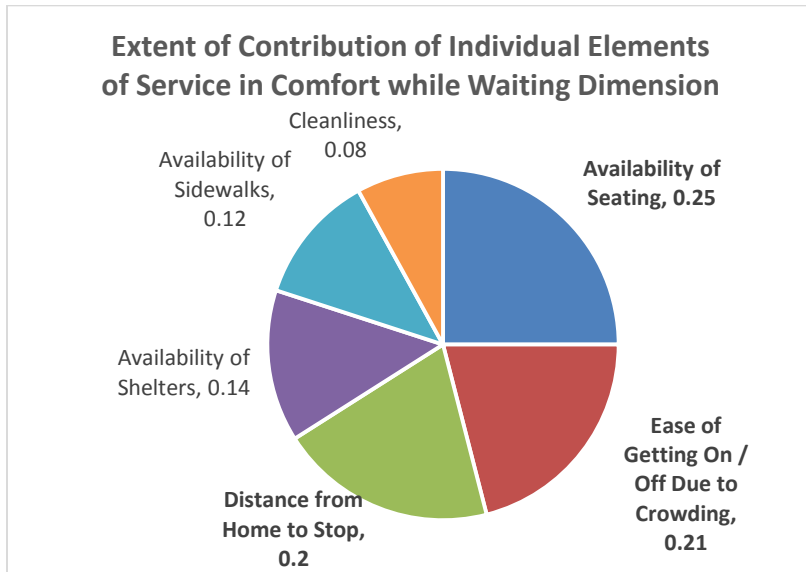
A clear focus for improvement to meet Rider expectations is providing seating at stops.

In addition, the ease of getting on and off the bus due to crowding should be carefully monitored to ensure that this does become a bigger issue and push it into the "improve" category due to decreased satisfaction ratings.

- Seating at stops is a greater problem in East King County.

Extent of Contribution of Individual Elements of Service in Comfort while Waiting Dimension

Cleanliness, 0.08
Availability of Sidewalks, 0.12
Availability of Shelters, 0.14
Distance from Home to Stop, 0.2
Availability of Seating, 0.25
Ease of Getting On / Off Due to Crowding, 0.21

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual element of service on overall perceptions of and satisfaction with Metro
Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		% Very Satisfied
Distance from home to stop	64%	Availability of seating	35%
Ease of getting on / off due to crowding	50%		
Low Importance / Above-Average Satisfaction Monitor		**Low Importance / Below-Average Satisfaction Strategically Target**	
	% Very Satisfied		% Very Satisfied
Availability of sidewalks	67%	Cleanliness	38%
		Availability of shelters	33%
		Lighting	33%

Key Drivers—Park-and-Ride Lots

Figure 122: Key Drivers Analysis: Park-and-Ride Lots

Reflecting the overall low importance of park-and-ride lots in contributing significantly to Riders' overall perceptions of and satisfaction with Metro, only one aspect of park-and-ride lots—personal safety—contributes individually.

The two new variables (maintenance and lighting) do not factor in at all as they are more highly correlated with safety than with overall perceptions and satisfaction.

While relatively unimportant overall, ratings for two key elements of service at park-and-ride lots are relatively low.

Extent of Contribution of Individual Elements of Service in Park-and-Ride Lots Dimension

Security of Vehicle, 0.05

Ability to Get Parking Space, 0.2

Personal Safety, 0.75

Numbers represent standardized beta coefficients indexed to 100 and represent the influence of each individual element of service on overall perceptions of and satisfaction with Metro

Those in bold type are significant contributors to overall satisfaction with and perceptions of Metro

High Importance / Above-Average Satisfaction Maintain		High Importance / Below-Average Satisfaction Improve	
	% Very Satisfied		
Personal Safety	52%		
Low Importance / Above-Average Satisfaction Monitor		Low Importance / Below-Average Satisfaction Strategically Target	
			% Very Satisfied
		Vehicle Security	40%
		Parking Availability	45%

INCREASING GOODWILL

Regression analysis was used to create the overall goodwill index described on page 181. Further analysis identifies specific strategies that could be used to improve this overall index.

Figure 123: Contributors of Goodwill Components to Overall Perceptions of Metro

Agency relations are the single greatest contributor to overall perceptions of Metro. Of the three attributes that make up agency relations, trust is the most important.

Level of Contribution of Individual Aspects of Agency Relations		
	Riders	**Non-Riders**
Agency I trust	**.45**	**.59**
Agency I like and respect	.32	.41
Agency I like to say I ride	.23	

Perceived benefits are the second major contributor to overall perceptions of Metro. Of the four attributes that make up this factor, three contribute significantly to overall perceptions of Metro. The importance varies by ridership.

Level of Contribution of Individual Perceived Benefits		
	Riders	**Non-Riders**
Opportunity to do something for the environment	.29	**.51**
Riding is less stressful than driving	**.46**	.29
Can do other things while riding	.25	.20

For Non-Riders, media and word of mouth contribute equally to overall perceptions of Metro. Among Riders, media has a greater influence.

Level of Contribution of External Influences		
	Riders	**Non-Riders**
Media	.66	.51
Word of Mouth	.33	.49

Extent to which Components of Goodwill Contribute to Overall Perceptions of Metro

External Influences, 0.11

Perceived Benefits, 0.28

Agency Relations, 0.60
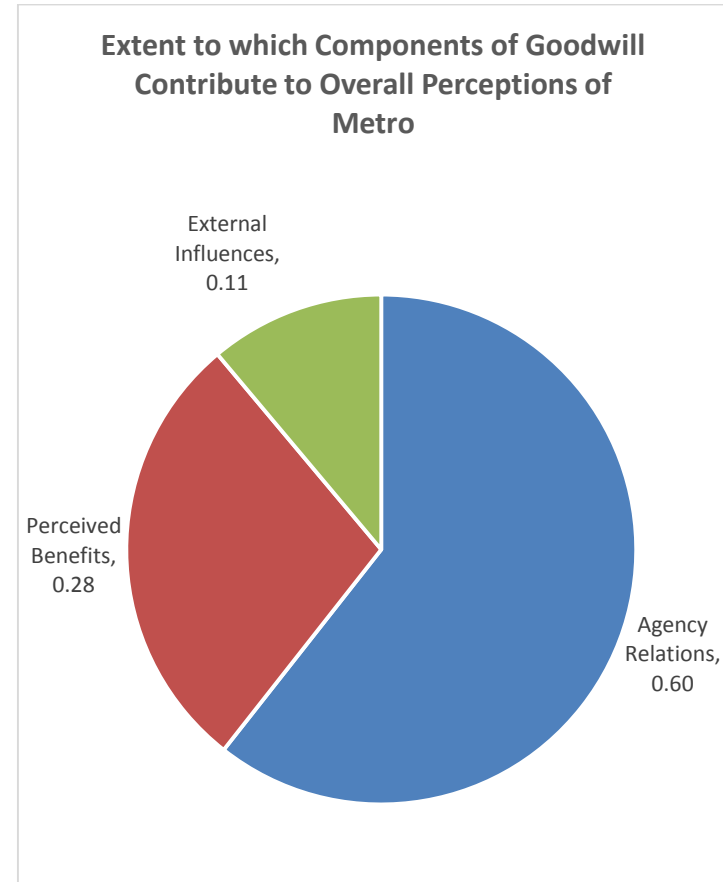
Question GW5: Based on anything you have seen, heard, or directly experienced please tell me if you agree or disagree with each of the following statements.

Question GW7: Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?

Numbers in graph and tables represent standardized beta coefficients indexed to 100 and represent the influence of each item on overall perceptions of Metro

Figure 124: Target Areas to Build Goodwill

To maintain and build goodwill, strategies will need to vary based on whether the focus is on Riders or Non-Riders.

To build goodwill among Riders, the focus should be on Infrequent and Moderate Regular Riders, specifically:

- Increasing trust in Metro among Infrequent Riders.
- Increasing the extent to which Moderate Regular and Infrequent Riders feel that riding is less stressful than driving.
- Working to provide positive stories about Metro to the media and posting these to Metro online.
- Using social media (e.g., blog posts) to build positive word of mouth about Metro.

To build goodwill among Non-Riders, the focus should be on:

- Increasing trust in Metro.
- Communicating ways in which riding Metro can be good for the environment and that it is less stressful than driving.
- Working to provide positive stories about Metro to the media and posting these to Metro online.
- Using social media (e.g., blog posts) to build positive word of mouth about Metro.

Agency Relations by Rider Status				
	Regular Riders (A)	Frequent Regular (B)	Moderate Regular (C)	Infrequent Riders (D)
Agency Relations				
Agency I trust	4.34 (D)	4.37	4.27	4.06
Agency I like and respect	4.36 (D)	4.39	4.30	4.06
Agency I like to say I ride	4.18 (D)	4.19	4.15	3.95
Perceived Benefits				
Riding is less stressful than driving	4.30 (D)	4.39 (C)	4.12	3.94
Do something for the environment	4.52	4.58 (C)	4.40	4.45
Can do other things while riding	4.49 (D)	4.56 (C)	4.33	4.21
External Influences				
Media	3.51 (D)	3.60 (C)	3.35	3.19
Word of mouth	3.60	3.63	3.53	3.37

Means are based on 5-point scale where "1" means "strongly disagree" and "5" means "strongly agree"

Agency Relations—Non-Riders	
	Agency Relations
Agency I trust	3.90
Agency I like and respect	3.88
Agency I like to say I ride	n.a.
	Perceived Benefits
Opportunity to do something for the environment	4.05
Riding is less stressful than driving	3.41
Can do other things while riding	4.16
	External Influences
Media	3.12
Word of mouth	3.34

Means are based on 5-point scale where "1" means "strongly disagree" and "5" means "strongly agree"

King County METRO

ENHANCING BRAND EQUITY

Regression analysis was used to identify which of the eight brand attributes (Question Set GW6) had the greatest impact on overall impressions of Metro (Question GW7).

Figure 125: Contributors of Brand Perceptions to Overall Perceptions of Metro

Six of the eight attributes have a significant contribution to overall perceptions of Metro:

- The largest single contributor is the extent to which residents believe that Metro has consistently high standards for quality of service.
- The extent to which Metro offers good value for the level of service provides is the second greatest contributor.
- The other four attributes contribute equally.

Improving perceptions of Metro in any these areas would have a significant positive impact on Metro's overall brand image.

Two brand attributes have little impact on overall impression of Metro:

- Operates equipment that is modern and up to date
- Is a leading public transportation agency

Changing perceptions of Metro in these areas would have little impact on Metro's overall brand image.

Extent to Which Brand Perceptions Contribute to Overall Perceptions of Metro

Is socially & environmentally conscious, 0.08

Values its customers, 0.12

Has consistently high standards for quality of service, 0.32

Is innovative, 0.14

Provides excellent customer service, 0.14

Offers good value for service provided, 0.20
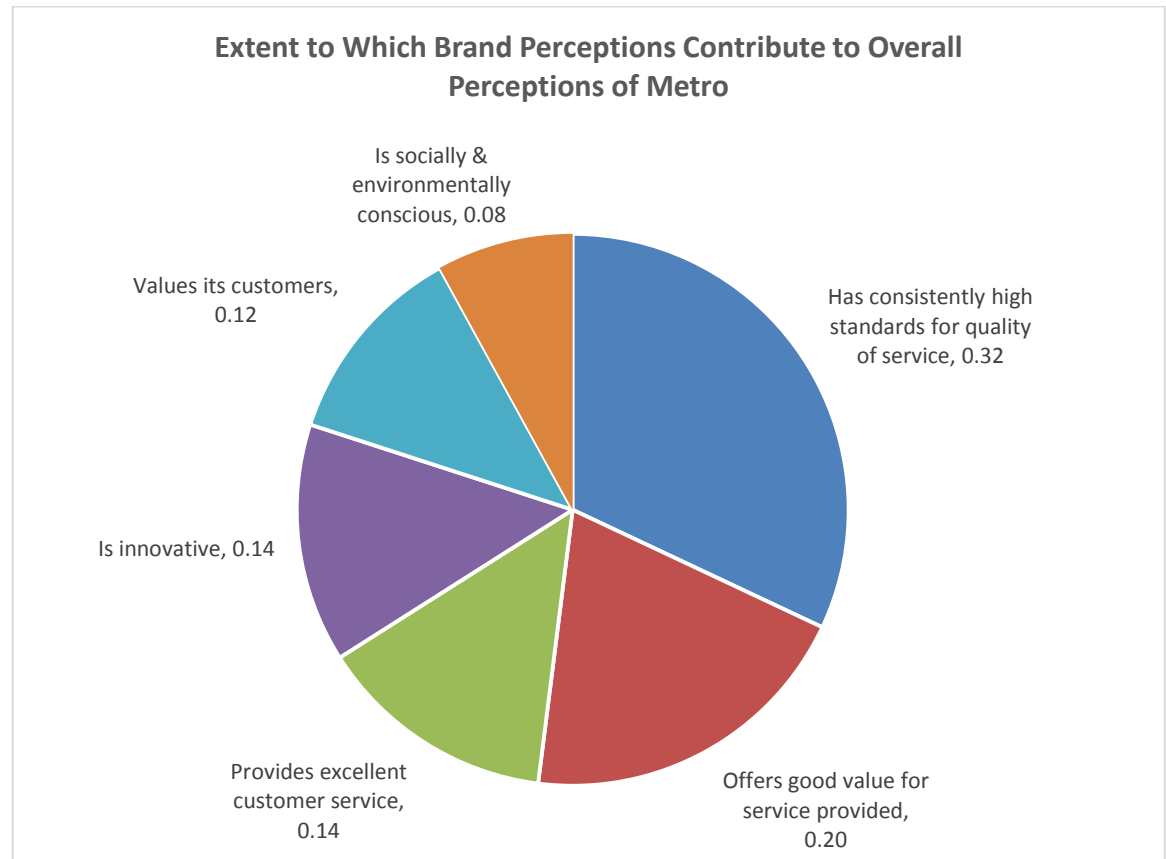
Numbers in graph represent standardized beta coefficients indexed to 100 and represent the influence of each item on overall perceptions of Metro

Question 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.*

Question GW7: *Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?*

Figure 126: Target Areas to Enhance Metro Brand

Metro's current brand strengths are

- Offering good value for level of service provided
- Demonstrating that it values its customers

Marketing communications that focus on these areas will further enhance positive perceptions of Metro.

Metro's brand weaknesses are

- Demonstrating that it has consistently high standards for the quality of service it provides
- Providing excellent customer service
- Being Innovative

An internal review should identify areas for specific service or process improvements in these areas. Marketing communications can focus on specific strengths in these areas while improvements are sought.

Agreement with Key Brand Statements			
	Impact Rank	% Strongly Agree	Mean
Offers good value for level of service provided	2	40%	4.10
Is socially and environmentally conscious	6	38%	4.13
Values its customers	5	37%	4.06
Has consistently high standards for quality of service	1	30%	3.88
Provides excellent customer service	3	29%	3.87
Is innovative	4	21%	3.53

Means are based on five-point scale where "1" means "strongly disagree" and "5" means "strongly agree"

ATTRACTING NON-RIDERS

As described on page 156, six Non-Rider segments were identified. Each segment has distinct attitudes toward riding which represent major barriers. Follow-up questions probed for likelihood of riding among those who found that riding Metro was at least somewhat appealing. Based on these combined questions it was possible to estimate the potential ridership for each segment as well as their likelihood of riding for commute purposes.

Figure 127: Potential Ridership among Six Non-Rider Attitudinal Segments

The Reliability Concerns segment represents the greatest potential for ridership.

- They are the most likely to say that riding transit is appealing, and they are the most likely to suggest they are *very* likely to ride in general. Moreover, this segment also represents the greatest potential to attract Riders who are very likely to ride as a commuter.
- As noted in the demographics characteristics of this segment, the majority of the members of this segment (68%) have relatively recent (within the past five years) experience riding Metro.

Reliability Concerns — 19% of Non-Riders
- 50% Appealing
- 21% Very Likely to Ride
- 14% Very Likely to Ride as a Commuter

Limited Access — 14% of Non-Riders
- 41% Appealing
- 17% Very Likely to Ride
- 8% Very Likely to Ride as a Commuter

Difficult to Use — 14% of Non-Riders
- 43% Appealing
- 15% Very Likely to Ride
- 9% Very Likely to Ride as a Commuter

Comfort Concerns — 13% of Non-Riders
- 48% Appealing
- 14% Very Likely to Ride
- 9% Very Likely to Ride as a Commuter

Image Conscious — 25% of Non-Riders
- 42% Appealing
- 13% Very Likely to Ride
- 7% Very Likely to Ride as a Commuter

Safety Conscious — 15% of Non-Riders
- 50% Appealing
- 12% Very Likely to Ride
- 6% Very Likely to Ride as a Commuter

Figure 128: Overall Attitudes towards Metro

The majority of members of the five out of the six Non-Rider attitudinal segments have positive perceptions of Metro. The exception is the Safety Conscious segment
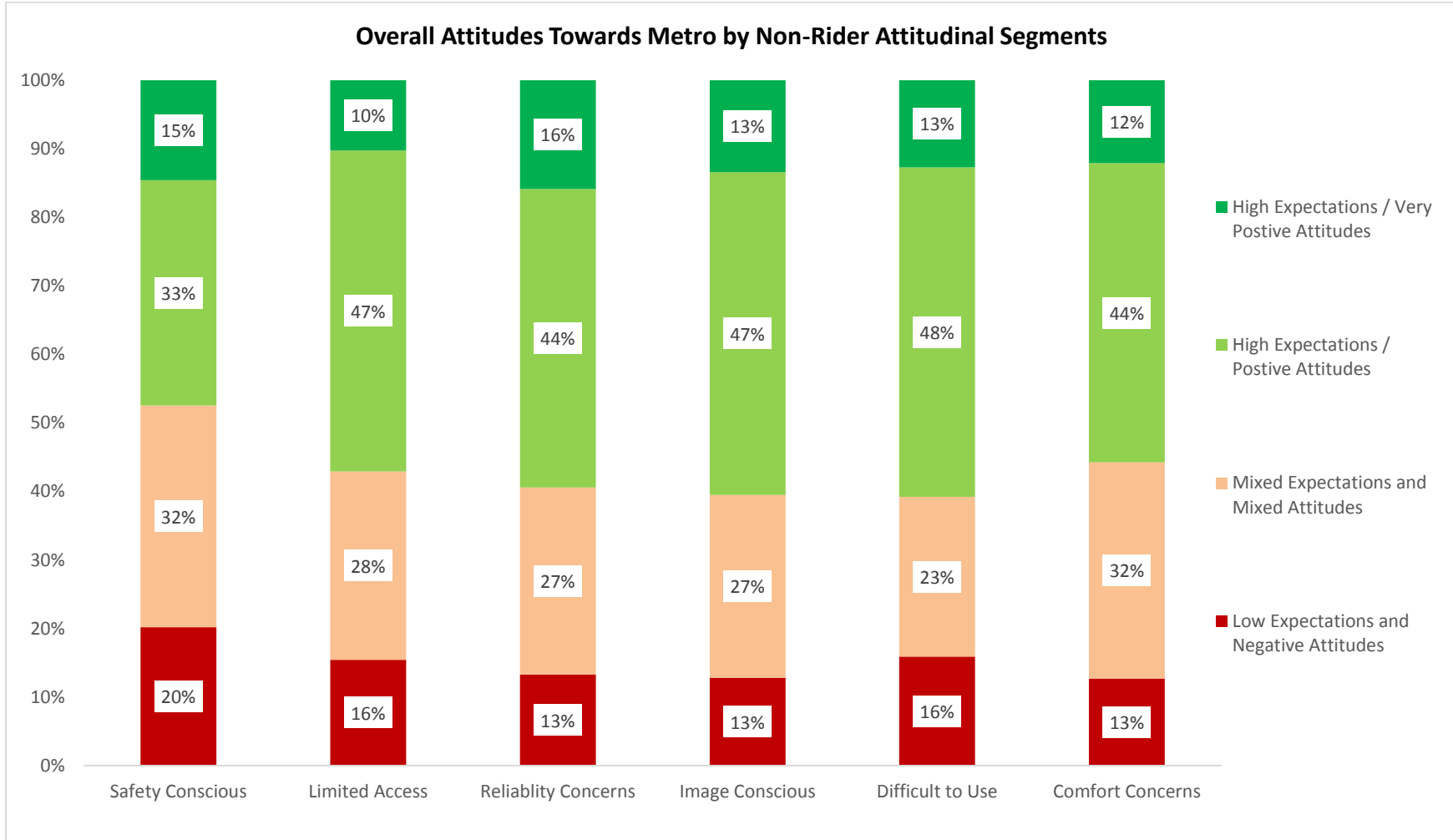
Overall Attitudes Towards Metro by Non-Rider Attitudinal Segments

Non-Riders who do not ride any local / regional transit system (n = 988) (n_w = 1,477)

Columns may sum to more or less than 100% due to rounding.

Figure 129: Perceived Benefits of Riding Metro

Four of the six Non-Rider segments are clearly differentiated by their perceptions of the benefits of riding Metro.

- The Reliability Concerns segment is generally neutral in terms of being able to do other things while riding and doing something good for the environment. They are more positive than the other segments in terms of saving money and reducing stress.

- The Image Conscious segment is the most likely to agree that riding Metro allows them to do other things while riding Metro. They also agree more strongly than some other segments that Metro can save them money. They are the least likely to agree that riding Metro is less stressful than driving.

- The Difficult to Use segment is similar to the Image Conscious segment—agreeing that you can do other things while riding. They also agree that riding Metro can save money.

- The Comfort Concerns segment is the most likely segment to agree that riding Metro provides the opportunity to do something good for the environment. They are the least likely segment to agree that riding Metro can save a lot of money.

	Safety Conscious	Limited Access	Reliability Concerns	Image Conscious	Difficult to Use	Comfort Concerns
	% Strongly Agree					
I can do other things while riding	49%	45%	47%	**56%**	**54%**	46%
Riding Metro provides opportunity to do something good for the environment	39%	44%	44%	45%	39%	**51%**
Riding Metro can save a lot of money	28%	28%	**36%**	**35%**	**35%**	21%
Riding Metro is less stressful than driving	30%	30%	**34%**	21%	31%	25%

APPENDIX

SAMPLE CHARACTERISTICS

Figure 130: Sample Characteristics Compared with General Population

	Unweighted	Weighted	Population (from ACS)*
Gender			
Male	48%	50%	50%
Female	52%	50%	50%
Age			
16–34	23%	28%	34%
35–54	35%	36%	37%
55 plus	42%	36%	29%
Household Comp			
Single-Person Household	26%	27%	32%
Multi-Person Household	74%	73%	68%
Average Household Size	2.2	2.2	2.5
Income			
Less than $35K	31%	23%	25%
$35K–<$75K	29%	33%	29%
$75K–<$100K	14%	15%	13%
$100K or more	26%	29%	34%
Median	$64,122	$69,291	$69,047
Race / Ethnicity			
White	77%	77%	64%
Black	5%	5%	6%
Asian	9%	9%	15%
Amer. Indian / Alaska Native	2%	3%	1%
Hispanic	5%	5%	9%
Mixed Race	1%	1%	5%
Employment Status			
Employed	63%	65%	65%
Not Employed	37%	35%	35%
* Source: 2012 American Community Survey one-year estimates			

Figure 131: Sample Characteristics by Sample Type (Landline versus Cell Phone)

	Unweighted Cell Phone Sample	Unweighted Landline Sample
Gender		
Male	52%	45%
Female	48%	55%
Age		
16–34	35%	15%
35–54	38%	34%
55 plus	27%	52%
Household Comp		
Single-Person Household	23%	29%
Multi-Person Household	77%	71%
Average Household Size	2.2	2.2
Income		
Less than $35K	20%	38%
$35K–<$55K	16%	14%
$55K–<$75K	17%	12%
$75K–<$100K	16%	13%
$100K or more	31%	23%
Median	$72,841	$55,822
Race / Ethnicity		
White	74%	79%
Black	6%	5%
Asian	11%	8%
Amer. Indian / Alaska Native	2%	3%
Hispanic	6%	4%
Mixed Race	2%	1%
Employment Status		
Employed	71%	57%
Not Employed	29%	43%

TABLE OF SAMPLE SIZES

		Survey Year				
		2009	**2010**	**2011**	**2012**	**2013**
		All Contacted Households Weighted by HHWGT				
All Contacted Households	Unweighted (n)	10,024	6,150	12,736	7,285	8,387
	Weighted (n_w)	10,024	6,150	12,736	7,285	8,387
		All Respondents Weighted by RespWGT				
All Respondents	Unweighted (n)	2,425		2,521		2,414
	Weighted (n_w)	2,425		2,521		2,414
Seattle / N. King	Unweighted (n)	805		844		804
	Weighted (n_w)	953		909		821
South King	Unweighted (n)	810		866		805
	Weighted (n_w)	833		926		914
East King	Unweighted (n)	810		811		805
	Weighted (n_w)	639		686		678
All Riders	Unweighted (n)	1,417		1,455		1,395
	Weighted (n_w)	712		693		892
Regular Riders	Unweighted (n)	1,219		1,241		1,207
	Weighted (n_w)	444		443		567
Infrequent Riders	Unweighted (n)	198		214		188
	Weighted (n_w)	268		250		324
Non-Riders	Unweighted (n)	1,008		1,066		1,019
	Weighted (n_w)	1,713		1,828		1,522
		Riders Only Weighted by RIDERWT				
All Riders	Unweighted (n)	1,417	1,140	1,455	1,218	1,395
	Weighted (n_w)	1,417	1,140	1,455	1,218	1,395
Seattle / N. King	Unweighted (n)	515	539	547	418	509
	Weighted (n_w)	870	705	883	771	729
South King	Unweighted (n)	445	289	450	400	442
	Weighted (n_w)	293	228	317	237	428
East King	Unweighted (n)	457	312	458	400	444
	Weighted (n_w)	254	208	254	210	238
Regular Riders	Unweighted (n)	1,219	830	1,241	831	1,207
	Weighted (n_w)	883	650	931	772	887
Infrequent Riders	Unweighted (n)	198	310	214	387	188
	Weighted (n_w)	534	490	524	446	508

QUESTIONNAIRE

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 = Mututally 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

SAMPLE

CREATE SAMPLETYPE

01 RDD LANDLINE BASE

02 RDD LANDLINE SCREEN FOR RIDERS

03 RDD CELL PHONE

04 LOW-INCOME SUPPLEMENTAL

S1 To confirm, are you 16 years of age or older?

    01 YES
    02 NO
    98 DON'T KNOW
    99 REFUSED

IF S1 = 01 CONTINUE
IF S1 = 02 THANK AND CONCLUDE [S1: NQ-UNDER 16 (THANK3 TEXT)]
IF S1 = 98, 99 THANK AND CONCLUDE [S1: SCREENER REFUSAL (THANK5 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)]
ASK S2B IF SAMPLETYPE = 01 (BASE LANDLINE) 02 (RIDER LANDLINE) (04) LOW INCOME LANDLINE

S2B To verify, is your home zip code [RECALL ZIP CODE FROM SAMPLE]?

    01 YES
    02 NO
    98 DON'T KNOW
    99 REFUSED

ASK S2C IF SAMPLETYPE = 03 (CELL PHONE) OR S2B = 02, 98, 99

S2C What is your home zip code?

    _____ ENTER CORRECT ZIP CODE **[RANGE 98001 – 98354]**
    98 DON'T KNOW
    99 REFUSED

S3   Including yourself, how many people live in your household who are 16 years of age or older?
(ENTER RANGE BETWEEN 1 AND 8; IF MORE THAN 8 PEOPLE IN HOUSEHOLD ENTER 8)

_____   ENTER NUMBER OF PERSONS 16+ IN HOUSEHOLD **[RANGE 1 – 8]**
98   DON'T KNOW
99   REFUSED

IF S3 > 01 AND < 98 CONTINUE
IF S3 EQ 01 SKIP TO S5A
IF S3 = 98, 99 THANK AND CONCLUDE [S3: SCREENER REFUSAL (THANK5 TEXT)]

ASK S4B IF S3 > 1

S4B   Including yourself, how many people in your household, 16 years of age or older, have taken **at least five (5)** one-way rides on a **Metro bus** or the **South Lake Union Streetcar** in the last 30 days?
(**AS NEEDED:** A round trip counts as two rides. A trip where you had to transfer counts as one ride.)

_____   ENTER NUMBER OF **REGULAR** RIDERS IN HOUSEHOLD **[RANGE 0 TO RESPONSE S3]**
98   DON'T KNOW
99   REFUSED

ASK S4A IF S4B < S3

S4A   Including yourself, how many people in your household, 16 years of age or older, have taken **between one (1) and four (4)** one-way rides on a **Metro Bus or the South Lake Union Streetcar** 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 S3 = 1 OR (S4A > 0 AND S4A < 98 OR S4B > 0 AND S4B < 98))

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

          ___   ENTER TOTAL NUMBER OF METRO BUS RIDES **[RANGE: 0-90]**
          98   DON'T KNOW
          99   REFUSED

ASK S5B IF S5A = 98, 99

S5B   Would that be more than four (4) rides on a Metro bus?

          01   YES, 5 OR MORE RIDES
          02   NO, 1 TO 4 RIDES
          03   NO, 0 RIDES / NEVER RIDE
          98   DON'T KNOW
          99   REFUSED

ASK S6A IF S3 = 1 OR (S4A > 0 AND S4A < 98 OR S4B > 0 AND S4B < 98))

S6A   Thinking about the last 30 days, how many **one-way rides** have **you** taken on **the South Lake Union Streetcar**?
(**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**)

          _____   ENTER NUMBER OF STREETCAR RIDES **[RANGE: 0-90]**
          98   DON'T KNOW
          99   REFUSED

ASK Q6B IF S6A = 98, 99

S6B   Would that be more than four (4) rides on the South Lake Union Streetcar?

          01   YES, 5 OR MORE RIDES
          02   NO, 1 TO 4 RIDES
          03   NO, 0 RIDES / NEVER RIDE
          98   DON'T KNOW
          99   REFUSED

IF S5A, S5B, S6A, AND S6B ALL EQ 98 OR 99, THANK AND CONCLUDE [RIDERMODE REFUSED (THANK5)]

PROGRAMMER: CREATE VARIABLE = HHRIDESTAT

01   REGULAR RIDER HOUSEHOLD: (S5A > 4 OR S5B = 01) OR (S6A > 4 OR S6B = 01) OR S4B > 0.

02   INFREQUENT RIDER HOUSEHOLD: (((S5A > 0 AND S5A < 5) OR S5B=02 OR (S6A > 0 AND S6A < 5) OR S6B=02) AND S3=01) OR (S4A > 0 AND S4B = 0).

03   NONRIDER HOUSEHOLD: ((S5A = 0 OR S5B=03) AND (S6A=0 OR S6B=03) AND S3=1) OR (S4A = 0 AND S4B=0).

USE BUS AND STREETCAR TO DETERMINE INDIVIDUAL RIDER STATUS:

COMPUTE NUMRIDES = S5A + S6A

CREATE VARIABLE = RIDESTAT

01   REGULAR RIDER – (NUMRIDES>=5 OR S5B=1 OR S6B=1)

02   INFREQUENT RIDER - (NUMRIDES=1-4 OR S5B=2 OR S6B=2)

03   NON-RIDER - ((S4A=0 & S4B=0) OR NUMRIDES=0 OR (S5B=3 AND S6B=3))

PROGRAMMER: IF CANNOT DETERMINE INDIVIDUAL RIDER STATUS, THANK AND CONCLUDE [RIDESTAT UNDETERMINED (THANK99 TEXT)]

CREATE VARIABLE = RIDEAREA

01   RIDER – SEATTLE / NORTH KING (RIDESTAT = 1 AND ZONE = 1)

02   INFREQUENT RIDER– SEATTLE / NORTH KING (GE TO 2 AND ZONE = 1)

03   RIDER – SOUTH KING (RIDESTAT = 1 AND ZONE = 2)

04   INFREQUENT RIDER– SOUTH KING (RIDESTAT GE 2 AND ZONE = 2)

05   RIDER – EAST KING (RIDESTAT = 1 AND ZONE = 3)

06   INFREQUENT RIDER– EAST KING (RIDESTAT GE 2 AND ZONE = 3)

CREATE VARIABLE RIDERMODE FOR:

PROGRAMMER: CREATE VARIABLE = HHRIDEAREA01

01   **REGULAR RIDER – SEATTLE / NORTH KING (HHRIDESTAT = 1 AND ZONE = 1)**

02   **INFREQUENT RIDER– SEATTLE / NORTH KING (HHRIDESTAT = 2 AND ZONE = 1)**

03   **REGULAR RIDER – SOUTH KING (HHRIDESTAT = 1 AND ZONE = 2)**

04   **REGULAR INFREQUENT RIDER– SOUTH KING (RIDESTAT = 2 AND ZONE = 2)**

05   **REGULAR RIDER – EAST KING (HHRIDESTAT = 1 AND ZONE = 3)**

06   **INFREQUENT RIDER – EAST KING (HHRIDESTAT = 2 AND ZONE = 3)**

IF HHRIDESTAT = 02 OR 03 AND SAMPLETYPE = 02 (RIDER ONLY LANDLINE) THANK AND CONCLUDE [NON-RIDER (THANK4 TEXT)

IF HHRIDESTAT = 03 <u>AND</u> S3 = 1 SKIP TO TEL1

IF HHRIDESTAT = 03 (NONRIDER HOUSEHOLD) <u>AND</u> S3 > 1 ASK SEL1

IF HHRIDESTAT = 01 (REGULAR RIDER HOUSEHOLD) <u>OR</u> 02 (INFREQUENT RIDER HOUSEHOLD) SKIP TO SEL2 BASE LOGIC

SEL1   To obtain a representative sample of all people in the area, I need to speak to the (male/youngest) person in your household who is 16 years of age and older. Would that be you?

     01   CONTINUE WITH CURRENT RESPONDENT **[SKIP TO TEL1 BASE LOGIC]**

     02   SELECTED RESPONDENT AVAILABLE **(REREAD INTRO FROM FLYSHEET) [SKIP TO TEL1 BASE LOGIC]**

     03   SELECTED RESPONDENT NOT AVAILABLE **(FOLLOW-INSTRUCTIONS ON NEXT SCREEN) [SURVEY SHOULD STOP HERE AND COUNT AS A SCREENER INCOMPLETE – DISPLAY "STOP SCREEN" TEXT FROM THE SECTION AT THE BOTTOM OF THE QUESTIONNAIRE WITH THANK TEXT] [SURVEY SHOULD RETURN TO SEL1 (IS THERE ANYWAY TO ERASE THAT ONE QUESTION JUST FOR THESE RESPONDENTS SO THAT THEY ARE FORCED TO ANSWER SEL1 AGAIN?)]**

IF RIDESTAT = 01 CONTINUE WITH CURRENT RESPONDENT (SKIP TO TEL1)

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 the individual in your household who has ridden Metro 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 TEL1 BASE LOGIC]

IF HHRIDESTAT = 02 AND RIDESTAT = 02 CONTINUE WITH CURRENT RESPONDENT / SKIP TO TEL1

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 the individual in your household who has ridden Metro 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 TEL1]

ASK TEL1 IF SAMPLETYPE = 01 (RDD BASE LANDLINE), 02 (RDD LANDLINE RIDER ONLY) OR 04 (LOW INCOME SUPPLEMENT)

TEL1   In addition to your landline, do you have a working cell phone?

(**AS NEEDED:** Do not include cell phones used only for business purposes.)

    01   YES, I HAVE A CELL PHONE
    02   NO, I DO NOT HAVE A CELL PHONE (LANDLINE ONLY)
    98   DON'T KNOW
    99   REFUSED

IF TEL1 98, 99 THANK AND CONCLUDE [TEL1: SCREENER REFUSAL (THANK5 TEXT)]

TEL2   In addition to your cell phone, is there at least one telephone line inside your home that is currently working and is **not** a cell phone?

(**AS NEEDED:** Do not include telephones only used for business or telephones only used for computers or fax machines.)

01   YES
02   NO
98   DON'T KNOW
99   REFUSED

TEL3   Of all the telephone calls that you receive, are. . .

01   All or almost all calls received on a cell phone
02   Some received on a cell phone and some on a regular landline phone
03   Very few or none received on a cell phone
98   DON'T KNOW
99   REFUSED

INT   I need to ask a few questions about you to ensure that this study is representative of the population of King County.

D2   May I please get your age?

__   AGE **[RANGE 1-97; NQ TERMINATE IF 1-15 ENTERED (THANK3)]**
98   DON'T KNOW
99   REFUSED

D2A   Would that be....
                (READ LIST UNTIL VALID RESPONSE GIVEN)

                01   16-17
                02   18-19
                03   20-24
                04   25-34
                05   35-44
                06   45-54
                07   55-64
                08   65 or Older
                98   DON'T KNOW
                99   REFUSED

D1   (ENTER GENDER OF RESPONDENT BY OBSERVATION. READ QUESTION TEXT ONLY IF NECESSARY)
                Are you…

                01   MALE
                02   FEMALE

S7   Is your total annual household income above or below $35,000 per year?
                (IF THEY SAY THEY MAKE EXACTLY $35,000, CHOOSE ABOVE $35,000 PER YEAR SELECT OPTION 02)
                (IF DON'T KNOW, PROBE FOR BEST ESTIMATE)

                01   BELOW $35,000 PER YEAR
                02        $35,000 OR GREATER PER YEAR
                98   DON'T KNOW
                99   REFUSED

IF SAMPLETYPE=04 (LOW INCOME) AND S7 = 02 THANK AND CONCLUDE [S7: NQ-HIGH INCOME (THANK99 TEXT)].

IF SAMPLETYPE=04 (LOW INCOME) AND S7 = 98, 99 THANK AND CONCLUDE [S7: SCREENER REFUSAL (THANK5 TEXT)].
IF SAMPLETYPE NE 04 (LOW INCOME) AND S7 = 98, 99 CONTINUE.

ASK GR1A_1 IF RIDEMODE EQ 01 (BUS ONLY) OR 03 (BUS AND STREETCAR)
SKIP TO M1 IF RIDERMODE EQ 02 (STREETCAR ONLY)

GR1A_1   What **Metro bus** route do you take most often?
(**PROBE AS NEEDED**: The one you use most often.)
[NOTATIONS/LIST BELOW] [SINGLE RESPONSE]

ASK GR1A_2 IF GR1A_1 NE 9998 OR 9999 (EXCLUDE ROUTE SELECTED AT GR1A_1)

GR1A_2   Is there another route that you use often?
(IF MULTIPLE ROUTES GIVEN, RECORD FIRST MENTION ONLY)
[NOTATIONS/LIST BELOW] [SINGLE RESPONSE]

ASK GR1A_3 IF GR1A_2 NE 9997, 9998, OR 9999 (EXCLUDE ROUTE SELECTED AT GR1A_1 AND GR1A_2)

GR1A_3   Do you use any other routes?
(IF MULTIPLE ROUTES GIVEN, RECORD FIRST MENTION ONLY)
[NOTATIONS/LIST BELOW] [SINGLE RESPONSE]
[GR1A_1 – GR1A_3 NOTATIONS/LIST]
(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")

[FORCE ONE RESPONSE FROM EITHER ROUTE NUMBER ENTRY OR SELECTION FROM THE LIST]
_____   ENTER ROUTE NUMBER **[ALLOW 1 TO 3 DIGITS]**

(ROUTE HELP LIST)
1001   RAPID RIDE LINE A
1002   RAPID RIDE LINE B
1003   RAPID RIDE LINE C
1004   RAPID RIDE LINE D
1005   SEATTLE STREETCAR / SOUTH LAKE UNION STREETCAR / STREETCAR
2005   LINK LIGHT RAIL

2006	SOUNDER
2007	KING COUNTY WATER TAXI
9995	OTHER **(SPECIFY: ONLY ENTER UNLISTED NON-NUMERIC RESPONSE)**
9997	NONE/NO OTHER ROUTE **[SHOW FOR GR1A_2 AND GR1A_3 SKIPTO GR1B IF ENTERED FOR GR1A_2]**
9998	DON'T KNOW
9999	REFUSED

ASK GR1AA IF ALL RESPONSES TO GR1A_1, GR1A_2, AND GR1A_3 ALL > 499 AND < 600 (SOUND TRANSIT & OTHER AGENCY ROUTES) OR ALL = 2005, 2006, 2007; NOTE ALL RESPONDENTS MAY NOT NAME THREE ROUTES SEE SEPARATE CHEAT SHEET

GR1AA   None of the routes that you mentioned are Metro routes. Can you please confirm that you have taken a bus trip on a **King County Metro** route, including taking a Metro bus trip within downtown Seattle or riding the South Lake Union Streetcar in the last 30 days?

01	YES
02	NO
98	DON'T KNOW
99	REFUSED

IF GR1AA = 02, 98, 99 – CONVERT TO RIDESTAT = 03 AND SKIP TO PARK-AND-RIDE SECTION

ASK GR1AA_1 IF (GR1AA EQ 01)

GR1AA_1   Please tell me which **METRO** bus route you took in the past 30 days.

(IF MULTIPLE ROUTES GIVEN, RECORD FIRST MENTION ONLY)

(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")

[FORCE ONE RESPONSE FROM EITHER ROUTE NUMBER ENTRY OR SELECTION FROM THE LIST]
_____   ENTER ROUTE NUMBER **[ALLOW 1 TO 3 DIGITS]**

1001	RAPID RIDE LINE A
1002	RAPID RIDE LINE B

1003   RAPID RIDE LINE C
1004   RAPID RIDE LINE D
1005   SEATTLE STREETCAR / SOUTH LAKE UNION STREETCAR / STREETCAR
9995   OTHER **(SPECIFY)**
9997   NO METRO ROUTES
9998   DON'T KNOW
9999   REFUSED

IF GR1AA_1 > 1005 CONVERT TO RIDESTAT = 03 (AND ADJUST RIDEAREA TO 02, 04, OR 06 DEPENDING ON ZONE) AND SKIP TO PARK-AND-RIDE SECTION.

GR5   Do your **Metro bus** trips usually cross the Seattle city limits, that is, are they two-zone trips?

01   YES
02   NO
98   DON'T KNOW
99   REFUSED

CREATE GROUP VARIABLE
RANDOMLY ASSIGN QUALIFED RESPONDENTS TO 12 APPROXIMATELY EQUAL SIZE GROUPS (n = 200)
REGULAR / INFREQUENT RIDERS
        SEATTLE / N. KING (GROUPS 1 AND 2)
        SOUTH KING (GROUPS 3 AND 4)
        EAST KING (GROUPS 5 AND 6)
NON-RIDERS
        SEATTLE / N. KING (GROUPS 7 AND 8)
        SOUTH KING (GROUPS 9 AND 10)
        EAST KING (GROUPS 11 AND 12)

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<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 2012?

      01   YES
      02   NO
      98   DON'T KNOW
      99   REFUSED

RESTORE [BUS] ONLY IF RIDERMODE = 01 AND NE 03; RESTORE [STREETCAR] ONLY IF RIDERMODE = 02 AND N3 03; RESTORE BOTH: BUS AND STREETCAR, BUS OR STREETCAR, BUSSES OR STREETCARS (AS NECESSARY) IF RIDERMODE = 03

M4   To what extent do you use the [[bus] or [streetcar]] to get around? Do you use [[bus] or [streetcar]] for…

      04   All of your transportation needs
      03   Most of your transportation needs
      02   Some of your transportation needs
      01   Very little of your transportation needs
      98   DON'T KNOW
      99   REFUSED

M5A   When you ride the [[bus] or [streetcar]], what is the primary purpose of the trip you take most often?
(**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 (SEAFAIR, BUMBERSHOOT SHUTTLES)
       08   JURY DUTY
       09   GO DOWNTOWN **(CLARIFY BEFORE USING THIS OPTION)**
       10   GET TO AIRPORT
       95   OTHER **(SPECIFY)**
       96   USE FOR ALL TRIPS
       97   NO SINGLE PRIMARY PURPOSE
       98   DON'T KNOW
       99   REFUSED

M6   During which of the following time periods do you ride the [[bus] or [streetcar]]? Do you ride …
(READ LIST AND GET A YES OR NO AFTER EACH)
(IF RESPONDENT SAYS "SOMETIMES" CODE AS 1 (YES/SOMETIMES))

       AA   Weekday mornings before 6:00 a.m.

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

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

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

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

       E   Weekday evenings after 7:00 p.m.

       F   Any time on Saturday?

       G   Any time on Sunday?

       01   YES/SOMETIMES
       02   NO
       98   DON'T KNOW
       99   REFUSED

DS1   Approximately how far is it from your home to the ~~nearest~~ Metro bus stop you use most often?
(ENTER NUMBER AND THEN SPECIFY WHETHER RESPONDENTS SAYS NUMBER OF BLOCKS OR NUMBER OF MILES. CLARIFY WITH RESPONDENT AS NECESSARY.)

        ___   ENTER NUMBER **[ALLOW DECIMALS] [RANGE: 1-999.99]**
        01   BLOCKS
        02   MILES
        93   LESS THAN ONE BLOCK
        94   LESS THAN ONE MILE
        98   DON'T KNOW
        99   REFUSED

Level of Service / Reliability
BASE: GROUPS = 01, 03, 05

RANDOMIZE M7B TO M7D

M7   Are you satisfied or dissatisfied with each of the following aspects of Metro service?
        (FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

M7B   Frequency of service

ASK M7B_1 THROUGH M7B_4 IF M7B < 03

        M7B_1   Frequency of service during rush hours

        M7B_2   Frequency of service during non-rush hours

        M7B_3   Frequency of evening service

        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

M7D   Number of stops the bus makes (**AS NEEDED:** Just answer in general for all Metro routes you take)

Comfort / Cleanliness Bus Interior
BASE: GROUPS = 02, 04, 06

RANDOMIZE M7F TO M7J2

M7G	Inside cleanliness of [[buses] or [streetcars]]
M7H	Availability of seating on the [[bus] or [streetcar]]
M7I	Overcrowding on the [[bus] or [streetcar]]
M7J	Ease of getting on and off due to crowding on the [[bus] or [streetcar]]
M7J1	The amount of lighting on the [[bus] or [streetcar]]

COMFORT / CLEANLINESS BUS STOPS
BASE: GROUPS = 02, 04, 06

RANDOMIZE M7F TO M7W
ASK M7Y AND M7X LAST AND NOTE SKIP PATTERN

M7F	Cleanliness of shelters and stops
M7Q	Availability of seating at shelters and stops
M7R	Amount of lighting at shelters and stops
M7T	Availability of shelters at [[bus] or [streetcar]] stops
MU	Distance from home to [[bus] or [streetcar]] stop
M7W	Ease of getting on and off the bus due to **crowding** at the [[bus] or [streetcar]] stops

ASK M7Y AFTER M7F THROUGH M7W

M7Y	Availability of sidewalks at [[bus] or [streetcar]] stops and shelters

Drivers
BASE: GROUPS = 01, 03, 05

RANDOMIZE M7K TO M7P [LOGIC CHANGE/NEW QUESTION]

M7K	Driver courtesy
M7L	Driver helpfulness with route and stop information
M7M	Drivers operate the [[bus] or [streetcar]] in a safe and competent manner

M7O   Drivers effectively handle problems on the [[bus] or [streetcar]]

M7OO   Drivers start and stop the [[bus] or [streetcar]] smoothly

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

TRANSFERRING
BASE: ALL RIDERS [RIDESTAT = 01 (REGULAR RIDER) OR 02 (INFREQUENT RIDER)]

M8A   How many transfers do you **usually** make when you use the [[bus] or [streetcar]] for your primary trip?
(ENTER 4 IF 4 OR MORE)
(**IF NEEDED SPECIFY:** One way trip)

___	ENTER NUMBER OF TRANSFERS **[RANGE 0 – 4]**
08	VARIES DEPENDING ON THE BUS/STREETCAR
98	DON'T KNOW
99	REFUSED

IF M8A = 0, 98, 99 SKIP TO F0 (FARE PAYMENT SECTION)
IF M8A = 01 ASK M8B
IF M8A = 2 – 4 OR 08, ASK M8B_2

M8B   **(IF THE RESPONDENT SAYS NO TO THE RESPONSE OPTIONS YOU READ OUT LOUD, ASK:** What other system do you transfer to or from?)

IF RIDERMODE =1	IF RIDERMODE =2	IF RIDERMODE =3
Does your primary trip involve a transfer between a **Metro bus** and… **(READ LIST (FIRST 5 OPTIONS); ACCEPT ONLY ONE RESPONSE)**	Does your primary trip involve a transfer between the **Streetcar** and… **(READ LIST (FIRST 4 OPTIONS); ACCEPT ONLY ONE RESPONSE)**	Does your primary trip involve a transfer between… **(READ LIST (FIRST 5 OPTIONS); ACCEPT ONLY ONE RESPONSE)**
01 Another Metro bus	01 A Metro bus	01 A Metro bus and another Metro bus
02 The Streetcar	02 **[FILTER OUT]**	02 A Metro bus and the Streetcar
03 Link Light Rail	03 Link Light Rail	03 A Metro bus or the Streetcar and Link Light Rail

IF RIDERMODE =1	IF RIDERMODE =2	IF RIDERMODE =3
Does your primary trip involve a transfer between a **Metro bus** and… **(READ LIST (FIRST 5 OPTIONS); ACCEPT ONLY ONE RESPONSE)**	Does your primary trip involve a transfer between the **Streetcar** and… **(READ LIST (FIRST 4 OPTIONS); ACCEPT ONLY ONE RESPONSE)**	Does your primary trip involve a transfer between… **(READ LIST (FIRST 5 OPTIONS); ACCEPT ONLY ONE RESPONSE)**
04 A Sound Transit bus	04 A Sound Transit bus	04 A Metro bus or the Streetcar and a Sound Transit bus
05 Sounder Train	05 Sounder Train	05 A Metro bus or the Streetcar and Sounder Train
06 PIERCE TRANSIT BUS	06 PIERCE TRANSIT BUS	06 A METRO BUS OR THE STREETCAR AND PIERCE TRANSIT BUS
08 COMMUNITY TRANSIT BUS	08 COMMUNITY TRANSIT BUS	08 A METRO BUS OR THE STREETCAR AND COMMUNITY TRANSIT BUS
10 WATER TAXI/PASSENGER-ONLY FERRY	10 **[FILTER OUT]**	10 A METRO BUS OR THE STREETCAR AND WATER TAXI/PASSENGER-ONLY FERRY
11 WASHINGTON STATE FERRIES	11 WASHINGTON STATE FERRIES	11 WASHINGTON STATE FERRIES
07 OTHER **(SPECIFY)**	07 OTHER **(SPECIFY)**	07 OTHER **(SPECIFY)**
98 DON'T KNOW	98 DON'T KNOW	98 DON'T KNOW
99 REFUSED	99 REFUSED	99 REFUSED

M8B_2 **(IF THE RESPONDENT SAYS NO TO THE RESPONSE OPTIONS YOU READ OUT LOUD, ASK:** What other systems do you transfer to or from?)

IF RIDERMODE =1	IF RIDERMODE =2	IF RIDERMODE =3
Does your primary trip involve a transfer between a **Metro bus** and… **[IF M8A>1, DISPLAY THE FOLLOWING NOTATION]** (READ LIST (FIRST 5 OPTIONS); SELECT ALL THAT APPLY)	Does your primary trip involve a transfer between the **Streetcar** and… **[IF M8A>1, DISPLAY THE FOLLOWING NOTATION]** (READ LIST (FIRST 4 OPTIONS); SELECT ALL THAT APPLY)	Does your primary trip involve a transfer between… **[IF M8A>1, DISPLAY THE FOLLOWING NOTATION]** (READ LIST (FIRST 5 OPTIONS); SELECT ALL THAT APPLY)
01 Another Metro bus	01 A Metro bus	01 A Metro bus and another Metro bus
02 The Streetcar	02 **[FILTER OUT]**	02 A Metro bus and the Streetcar
03 Link Light Rail	03 Link Light Rail	03 A Metro bus or the Streetcar and Link Light Rail
04 A Sound Transit bus	04 A Sound Transit bus	04 A Metro bus or the Streetcar and a Sound Transit bus
05 Sounder Train	05 Sounder Train	05 A Metro bus or the Streetcar and Sounder Train
06 PIERCE TRANSIT BUS	06 PIERCE TRANSIT BUS	06 A METRO BUS OR THE STREETCAR AND PIERCE TRANSIT BUS
08 COMMUNITY TRANSIT BUS	08 COMMUNITY TRANSIT BUS	08 A METRO BUS OR THE STREETCAR AND COMMUNITY TRANSIT BUS
10 WATER TAXI/PASSENGER-ONLY FERRY	10 **[FILTER OUT]**	10 A METRO BUS OR THE STREETCAR AND WATER TAXI/PASSENGER-ONLY FERRY
11 WASHINGTON STATE FERRIES	11 WASHINGTON STATE FERRIES	11 WASHINGTON STATE FERRIES
07 OTHER **(SPECIFY)**	07 OTHER **(SPECIFY)**	07 OTHER **(SPECIFY)**
98 DON'T KNOW **[ME]**	98 DON'T KNOW **[ME]**	98 DON'T KNOW **[ME]**
99 REFUSED **[ME]**	99 REFUSED **[ME]**	99 REFUSED **[ME]**

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

M10A   How many minutes do you usually wait for a [[bus] or [streetcar]] when you transfer?
        (ENTER 60 IF 60 OR MORE)

___   RECORD MINUTES [RANGE 0 TO 60] **(ENTER 60 IF 60 OR MORE)**
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

FARE PAYMENT
BASE ALL RIDERS [RIDESTAT = 01 (REGULAR RIDER) OR 02 (INFREQUENT RIDER)]

F0.   How do you usually pay your bus fare? Do you use...?
        (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)
        (READ LIST; SELECT ALL THAT APPLY)
01   An ORCA Card
02   Cash
03   Tickets
04   A U-Pass (or Husky Card)
05   A Regional Reduced Fare Permit, including a Senior Pass and Disability Card/Pass **(RRFP)**
06   FLEXPASS / PASSPORT
07   ACCESS PASS
08   SCHOOL DISTRICT CARD / PASS FROM SCHOOL **(PROBE WITH: Is this High School or College? IF COLLEGE, CODE AS 04 – U-PASS/HUSKY CARD)**
94   KING COUNTY EMPLOYEE ID / BADGE
95   OTHER **(SPECIFY)**
98   DON'T KNOW **[ME]**
99   REFUSED **[ME]**

F1   **[HIDDEN QUESTION: RECODE F0 RESPONSES BELOW]**

        01   An ORCA Card **[F0=01, 06, 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]**
        94   KING COUNTY EMPLOYEE ID / BADGE **[F0=94]**
        95   OTHER **(SPECIFY) [F0=95]**
        98   DON'T KNOW **[ME] [F0=98]**
        99   REFUSED **[ME] [F0=99]**

ASK F1A IF (F1 = 01) AND (F1 NE 5)
IF (F1=01 AND F1=94) AUTOCODE F1A AS 06 (FLEXPASS / PASSPORT)
        IF (F0=08), AUTO CODE F1A=02 (YOUTH CARD)

F1A   Is your ORCA card an…
        (IF NO TO ALL ASK: Is it something else?**)**
        (READ LIST; SELECT SINGLE RESPONSE)

        01   Adult card (**AS NEEDED:** Includes passport, flexpass, or a pass provided by employer)
        02   Youth 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)
        06   FLEXPASS / PASSPORT
        07   ACCESS PASS
        94   KING COUNTY EMPLOYEE ID / BADGE
        95   SOMETHING ELSE **(SPECIFY)**
        98   DON'T KNOW
        99   REFUSED

F1B   Is your Regional Reduced Fare Permit on…

01   An ORCA Card or (**AS NEEDED:** which has a whale and the word "ORCA" on it)
02   Not on an ORCA card
98   DON'T KNOW
99   REFUSED

ASK F1B_1 IF (F1 EQ 01 AND F1A EQ 03) OR F1 EQ 05

F1B_1   Is your Regional Reduced Fare Permit a…

01   Senior Permit or
02   A Disabled Permit
98   DON'T KNOW
99   REFUSED

CREATE VARIABLE: FARE_PAYMENT AS SINGLE RESPONSE VARIABLE:

01 CASH / TICKETS [IF F1 = 02 OR F1=3] AND [(F1 NE 01) OR (F1 NE 04) OR (F1 NE 05) OR (F1 NE 06) OR (F1 NE 07) OR (F1 NE 08) OR (F1 NE 94) OR (F1 NE 95)]

03 ADULT ORCA [IF F1= 01 AND F1A EQ 01, 06, 07, 94]

04 YOUTH ORCA [IF F1 = 01 AND F1A EQ 02]

05 RRFP ORCA (F1 EQ 01 AND F1A EQ 03) OR (F1 EQ 05 AND F1B EQ 01) OR (F1 EQ 01 AND F1 EQ 05)

06 RRFP NOT ORCA (F1 EQ 05 AND F1B EQ 02)

07 U-PASS [IF F1 = 04 OR F1A = 04]

95 OTHER [IF F1 = 94 – REGARDLESS OF IF THEY PICKED ANOTHER RESPONSE AS WELL] OR [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]

F1D   Do you have a pass or an E-Purse on your RRFP (Reduced Regional Fare Permit)?
           (IF RESPONDENT SAYS DON'T KNOW: Do you load money onto your ORCA Card to pay your fare? **(IF YES, CODE AS E-PURSE))**

           01   PASS
           02   E-PURSE
           03   BOTH
           04   NO / NEITHER
           98   DON'T KNOW
           99   REFUSED

ASK F2 IF (FARE_PAYMENT= 03) OR (FARE_PAYMENT = 04) (YOUTH ORCA) IF (F1=08 AND F1A=02 AUTOCODE F2A = 05 (SCHOOL DISTRICT PASS)

F2   Do you have a pass or an E-Purse on your ORCA Card?
           (IF RESPONDENT SAYS DON'T KNOW: Do you load money onto your ORCA Card to pay your fare? **(IF YES, CODE AS E-PURSE))**

           01   PASS
           02   E-PURSE
           03   BOTH
           04   NO / NEITHER
           98   DON'T KNOW
           98   REFUSED

ASK F2A IF F2 = 01 OR 03

F2A   What type of pass do you have loaded on your ORCA card?
            (READ LIST (FIRST 3 OPTIONS) AND STOP WHEN RESPONDENT SAYS YES)

           01   A regional transit pass (**AS NEEDED:** or Pugetpass **(PEW-JET)**)
           04   A Passport or Flexpass (**AS NEEDED:** Pass provided by employer) or
           95   Something Else **(SPECIFY)**
           93   ACCESS PASS
           02   AN AGENCY SPECIFIC PASS **[CHANGED TO ALL CAPS AND MOVED DOWN IN LIST]**
           94   CARPOOL / VANPOOL PASS
           96   SOMETHING PROVIDED BY EMPLOYER DON'T KNOW IF E-PURSE OR PASS
           97   NOTHING ON CARD **[ME]**
           98   DON'T KNOW **[ME]**
           99   REFUSED **[ME]**

F2C   Where do you typically purchase your pass or add value to your E-Purse?
(IF RESPONDENT SAYS "STATION, WESTLAKE STATION, OR JACKSON STATION" PROBE "IS THAT AT THE VENDING MACHINE OR THE METRO CUSTOMER SERVICE OFFICE)
(READ LIST ONLY IF NECESSARY; SELECT ALL THAT APPLY)

     01   ONLINE / ORCA WEBSITE
     02   METRO CUSTOMER SERVICE OFFICES (**AS NEEDED:** LOCATED AT 2^(ND) AND JACKSON AND WESTLAKE TUNNEL STATION
     03   ORCA VENDING MACHINES (**AS NEEDED:** A KIOSK AT STATIONS WHERE RIDERS CAN BUY A NEW ADULT ORCA CARD, ADD A PASS OR E-PURSE VALUE TO THEIR ORCA CARD OR PURCHASE A TRAIN TICKET.)
     04   RETAILERS (**AS NEEDED:** E.G., BARTELLS, QFC, SAFEWAY)
     05   ORCA TO GO MOBILE SALES (**AS NEEDED:** A VAN THAT TRAVELS AROUND KING COUNTY, MAKING STOPS AT SENIOR CITIZEN CENTERS, MAJOR EVENTS AND FAIRS, AND OTHER KEY LOCATIONS TO PROVIDE FULL-SERVICE ORCA CARD SALES AND ASSISTANCE.)
     95   SOMEWHERE ELSE **(SPECIFY)**
     98   **(NEVER READ)** DON'T KNOW [ME]
     99   **(NEVER READ)** REFUSED [ME]

F3A   Does your employer or school pay for part or all of your ORCA pass or E-purse?
(**IF YES, READ**: Would that be all or some of the cost?)
(**AS NEEDED:** Would that be your school or your employer?)

     01   YES, ALL PAID FOR BY SCHOOL
     02   YES, ALL PAID FOR BY EMPLOYER
     03   YES, SOME PAID FOR BY SCHOOL
     04   YES, SOME PAID FOR BY EMPLOYER
     05   NO, NONE PAID FOR BY SCHOOL/EMPLOYER
     97   NOT EMPLOYED AND DON'T ATTEND SCHOOL
     98   DON'T KNOW
     99   REFUSED

F5   Are you satisfied or dissatisfied with each of the following?
       (FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

ALL RIDERS

F5A Ease of paying fares when boarding

ASK IF FARE_PAYMENT = 03 [ADULT ORCA], 04 [YOUTH ORCA], 05 [RRFP ORCA]

F5B Overall satisfaction with your ORCA card

ASK IF F2A = 01 OR 02

F5C Ease of loading a pass on your ORCA card

ASK IF (F2 = 02, 03) OR (F1D = 02, 03)

F5D Ease adding value to your E-Purse

ASK IF F2A = 01, 02, 03 OR F2=02 OR (F1D = 02, 03)

F5E Availability of locations to purchase a pass or add value to your E-Purse

ASK IF F5G OF ALL RIDERS

F5G Value of service for fare paid

    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

PR1   Have you used a Metro park and ride lot within the last year?

         01   YES
         02   NO
         98   DON'T KNOW
         99   REFUSED

ASK PR2B TO PR2D IF PR1 = 01
IF PR1 EQ 02, 98, 99 SKIP TO NEXT SECTION

PR2B   How many times have you used Metro's park-and-ride lots in the last 30 days?

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

ASK PR2C, PR2D, PR2E IF PR2B GE 1 AND LT 98

PR2C   How far is it from your home to the park-and-ride lot you use most often?
         (ENTER NUMBER AND THEN SPECIFY WHETHER RESPONDENTS SAYS NUMBER OF BLOCKS OR NUMBER OF MILES)
         ___   ENTER NUMBER **[ALLOW DECIMALS] [RANGE: 1-999.99]**
         01   BLOCKS
         02   MILES
         93   LESS THAN ONE BLOCK
         94   LESS THAN ONE MILE
         98   DON'T KNOW
         99   REFUSED

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

PR2E   What are the primary reasons you are using a park-and-ride lot?
            (IF RESPONDENT SAYS "TO CATCH A BUS" CLARIFY WITH: Would that be a Sound Transit, Community Transit or Pierce Transit bus?**)**

            (SELECT ALL THAT APPLY)

    01   MEET PEOPLE FOR AN ACTIVITY
    02   MEET CARPOOL
    03   MEET VANPOOL
    04   CATCH A SOUND TRANSIT BUS
    05   CATCH A PIERCE TRANSIT BUS
    06   CATCH A COMMUNITY TRANSIT BUS
    08   CATCH A KING COUNTY METRO BUS
    07   PARKING TO GO TO A NEARBY DESTINATION
    09   TRANSFER TO/FROM ANOTHER BUS
    95   OTHER **(SPECIFY)**
    98   DON'T KNOW **[ME]**
    99   REFUSED **[ME]**

PR3 Are you satisfied or dissatisfied with the following aspects of park-and-ride lots?
(FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

ASK PR3A, PR3B, PR3C IF PR1 EQ 01

PR3A The ability to get a parking space at park-and-ride lots

PR3B Personal safety at the park-and-ride lot

PR3C Security of your automobile at the park-and-ride lot

ASK PR3D, PR3E, PR3F IF PR2B GE 1 AND LT 98

PR3D Maintenance of facilities at park-and-ride lots

PR3E Lighting at park-and-ride lots

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

PS1   How often do you do each of the following? Would you say frequently, sometimes, rarely, or never?

        PS1A   Get on a bus or Link Light Rail in the downtown transit tunnel

        PS1B   Ride the bus or streetcar when it is dark

            04   FREQUENTLY
            03   SOMETIMES
            02   RARELY
            01   NEVER
            98   DON'T KNOW
            99   REFUSED

PS2   Are you satisfied or dissatisfied with the following aspects of safety and security on Metro buses and streetcars?
        (FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

RANDOMIZE PS2A TO PS2E

        PS2A   Personal safety on the bus or streetcar related to the conduct of others during the daytime

ASK PS2B IF PS1B > 01 AND < 98

        PS2B   Personal safety on the bus or streetcar related to the conduct of others after dark

        PS2C   Personal safety waiting for the bus or streetcar in the daytime

ASK PS2D IF PS1B > 01 AND < 98

        PS2D   Personal safety waiting for the bus or streetcar after dark

ASK PS2E IF PS1A > 01 AND < 98

        PS2E   Personal safety in the downtown transit tunnel

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

PS3A   Do you avoid riding the bus or streetcar due to concerns about your personal safety?

01	YES
02	NO
98	DON'T KNOW
99	REFUSED

PS5   Please tell me if you agree or disagree with each of the following statements.
(FOLLOW-UP) Would that be very or somewhat (agree/disagree)?

RANDOMIZE PS5A TO PS5G

PS5A   I feel significantly safer riding Metro now than I did a year ago

PS5B   Metro has been very proactive in improving safety and security

PS5G   Metro provides a safe and secure transportation environment

01	STRONGLY DISAGREE
02	SOMEWHAT DISAGREE
04	SOMEWHAT AGREE
05	STRONGLY AGREE
03	NEITHER AGREE NOR DISAGREE / NO OPINION
97	NOT APPLICABLE
98	DON'T KNOW
99	REFUSED

King County
METRO

NON-RIDERS
BASE ALL RIDERS: RIDESTAT = 01 (REGULAR RIDER) OR 02 (INFREQUENT RIDER)

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 most often?
          (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)

          01   SOUND TRANSIT BUS
          02   LINK LIGHT RAIL
          03   SOUNDER TRAIN
          04   KING COUNTY WATER TAXI
          05   MONORAIL
          06   COMMUNITY TRANST
          07   PIERCE TRANSIT
          08   KITSAP TRANSIT
          09   WASHINGTON STATE FERRIES
          95   OTHER **(SPECIFY)**
          98   **(NEVER READ)** DON'T KNOW **[ME]**
          99   **(NEVER READ)** REFUSED **[ME]**

ASK NON1C IF NON1A EQ 01

NON1C   How many one-way trips have you taken on [RESTORE RESPONSE TO NON1B] in the past 30 day?

          ___   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** or the **South Lake Union Streetcar**? Was it...

           01   Within the past 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

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

           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

NON2B   What is the main reason you don't ride the bus or streetcar?
          [INTERVIEWER INSTRUCTION: If "I have a car / Car is convenient", PROBE: "Why is it more convenient?"]
          [INTERVIEWER INSTRUCTION: If "Problems with Schedule/Routing", PROBE: "What type of problems?"]
          (PROBE FOR SINGLE RESPONSE)

>   1   CHANGED JOBS / MOVED
>   2   JOBSITE / BUSINESS MOVED
>   3   LOST JOB */ RETIRED*
>   4   CAR IS MORE CONVENIENT / LIKE DRIVING / HAVE A CAR **(SPECIFY)**
>   5   NEED CAR FOR WORK / BEFORE OR AFTER WORK
>   6   WORK HOURS AREN'T REGULAR / FLEXIBLE ENOUGH
>   7   BUS TRAVEL TAKES TOO LONG
>   8   DISLIKE TRANSFERRING
>   9   PROBLEMS WITH BUS SCHEDULE / ROUTING **(SPECIFY)**
>   10   DON'T LEAVE MY HOME / DON'T GO FAR FROM HOME
>   11   SERVICE NOT CLOSE TO HOME
>   12   TOO INCONVENIENT
>   13   WORK AT HOME / CLOSE TO MY HOME
>   14   BUS STOP TOO FAR
>   15   NO ROUTES WHERE I NEED TO GO
>   16   SCHEDULE IS INCONVENIENT
>   17   OTHER **(SPECIFY)**
>   19   HAVE SMALL CHILDREN / HARD TO TRAVEL WITH CAR SEATS
>   20   BUS ATMOSPHERE / SMELL / BEHAVIOR OF OTHER PASSENGERS / ATMOSPHERE AT BUS STOP
>   21   NO NEED TO RIDE ANYMORE / DON'T GO DOWNTOWN / I FINISHED SCHOOL
>   99   DON'T KNOW / REFUSED

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: 1-999.99]**
>   03   BLOCKS
>   04   MILES
>   93   LESS THAN ONE BLOCK
>   94   LESS THAN ONE MILE
>   98   DON'T KNOW
>   99   REFUSED

NON5   Please tell me if you agree or disagree with each of the following statements.
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?
(READ QUESTION AS WRITTEN. DO NOT READ RESPONSE LIST. "NEITHER AGREE NOR DISAGREE / NO OPINION / DON'T FEEL ONE WAY OR THE OTHER, ETC." IS AN ACCEPTABLE ANSWER)

NON5_1   I am familiar with the services provided by Metro – that is, what services are available, schedules, routes, etc.

NON5_3   I can count on Metro to get me to where I am going on time

NON5_4   Metro bus service is too infrequent to make it convenient to use

NON5_5   I do not use public transportation because I prefer to drive alone

NON5_13   Compared with driving alone, riding Metro takes too much time

NON5_6   Metro buses are too crowded

NON5_7   Metro buses are clean and comfortable

NON5_8   I worry about my personal safety on Metro buses

NON5_9   The behavior of some of the people on Metro buses makes me feel uncomfortable ~~or unsafe~~

NON5_10   I worry about my personal safety while waiting at the bus stops

NON5_11   The behavior of some of the people at or near the bus stops makes me feel uncomfortable or unsafe

NON5_12   I would not ride if I had to transfer buses (**AS NEEDED:** from one bus to another to get from my home to my destination)

NON5_15   I just can't see myself riding the bus

NON5_16   I find it difficult to use public transportation in bad weather

NON5_17   It is difficult for me to walk very far to a bus stop

NON5_18   There are no Metro bus stops near my home

NON5_19   There is no Metro service available to get me where I want to go

01	STRONGLY DISAGREE
02	SOMEWHAT DISAGREE
03	NEITHER AGREE NOR DISAGREE/NO OPINION
04	SOMEWHAT AGREE
05	STRONGLY AGRE
97	NOT APPLICABLE
98	DON'T KNOW
99	REFUSED

DOWNTOWN SAFETY
BASE ALL RIDERS: RIDESTAT = 01 (REGULAR RIDER) OR 02 (INFREQUENT RIDER)

RANDOMIZE DTS2_1 TO DTS2_10

PLACE A CAP ON THE NUMBER OF RESPONDENTS WHO GET THESE QUESTIONS:
   -ONCE 600 RIDERS (RIDESTAT = 01) SAY "FREQUENTLY" OR "SOMETIMES" AT DTS1 AND GO THROUGH THE DOWNTOWN SAFETY SECTION, STOP ASKING RIDERS
   -ONCE A TOTAL OF 600 INFREQUENT/NON-RIDERS (RIDESTAT=02 OR RIDESTAT=03) SAY "FREQUENTLY" OR "SOMETIMES" AT DTS1 AND GO THROUGH THE DOWNTOWN SAFETY SETION, STOP ASKING INFREQUENT / NON-RIDERS

DTS1   How often do you go to downtown Seattle? Would you say frequently, sometimes, rarely, or never?
   (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.**)**

04	FREQUENTLY
03	SOMETIMES
02	RARELY
01	NEVER
98	DON'T KNOW
99	REFUSED

DTS2 Please tell me if you agree or disagree with each of the following statements.
(FOLLOW-UP) Would that be strongly or somewhat (agree/disagree)?

(READ QUESTION AS WRITTEN. DO NOT READ RESPONSE LIST. "NEITHER AGREE NOR DISAGREE / NO OPINION / DON'T FEEL ONE WAY OR THE OTHER, ETC." IS AN ACCEPTABLE ANSWER)

DTS2_1 I often avoid going to Downtown Seattle because parking is too expensive.

DTS2_2 It is easy to find parking in Downtown Seattle.

DTS2_3 Panhandlers make me uncomfortable when I'm downtown.

DTS2_4 I feel safe in Downtown Seattle during the daytime.

DTS2_5 I feel safe in Downtown Seattle at night.

DTS2_6 Safety in Downtown Seattle is improving.

DTS2_7 Cleanliness in downtown Seattle is improving.

ASK DTS2_9 AND DTS2_10 (IF DTS1 = 03, 04)

DTS2_9 It is safe to use public transportation in downtown Seattle during the daytime

DTS2_10 It is safe to use using public transportation in downtown Seattle after dark

01	STRONGLY DISAGREE
02	SOMEWHAT DISAGREE
03	NEITHER AGREE NOR DISAGREE/NO OPINION
04	SOMEWHAT AGREE
05	STRONGLY AGRE
97	NOT APPLICABLE
98	DON'T KNOW
99	REFUSED

DTS3A   What specific intersection or location in downtown Seattle do you feel **most** unsafe waiting for the bus **during the day**?

(ACCEPT BEST DESCRIPTION OF LOCATION OR ENTER INTO OTHER AND TYPE IN LOCATION. ENTER UP TO 3 RESPONSES)

20	BELLTOWN
15	DOWNTOWN TRANSIT TUNNEL STATION
17	PIKE PLACE MARKET
18	PIONEER SQAURE
22	MACY'S
16	WESTLAKE PARK / WESTLAKE MALL
30	THIRD (3RD) & PIKE / THIRD (3RD) & PINE
31	THIRD (3RD) & UNION
32	THIRD (3RD) & BELL
95	OTHER 1 **(SPECIFY)**
96	OTHER 2 **(SPECIFY)**
97	OTHER 3 **(SPECIFY)**
98	DON'T KNOW
99	REFUSED

DTS3A_1   In which Downtown Transit Tunnel Station do you feel unsafe?

(ENTER SINGLE RESPONSE)

26	INTERNATIONAL DISTRICT / SODO STATION
27	PIONEER SQUARE STATION
28	UNION STREET STATION
29	WESTLAKE STATION
30	CONVENTION CENTER STATION
95	OTHER **(SPECIFY)**
98	DON'T KNOW
99	REFUSED

DTS4A   What specific intersection or location in downtown Seattle do you feel **most** unsafe waiting for the bus **after dark**?
(ACCEPT BEST DESCRIPTION OF LOCATION OR ENTER INTO OTHER AND TYPE IN LOCATION. ENTER UP TO 3 RESPONSES)

20	BELLTOWN
15	DOWNTOWN TRANSIT TUNNEL STATION
17	PIKE PLACE MARKET
18	PIONEER SQAURE
22	MACY'S
16	WESTLAKE PARK / WESTLAKE MALL
30	THIRD (3RD) & PIKE / THIRD (3RD) & PINE
31	THIRD (3RD) & UNION
32	THIRD (3RD) & BELL
95	OTHER 1 **(SPECIFY)**
96	OTHER 2 **(SPECIFY)**
97	OTHER 3 **(SPECIFY)**
98	DON'T KNOW
99	REFUSED

DTS4A_1   In which Downtown Transit Tunnel Station do you feel unsafe?
(ENTER SINGLE RESPONSE)

26	INTERNATIONAL DISTRICT / SODO STATION
27	PIONEER SQUARE STATION
28	UNION STREET STATION
29	WESTLAKE STATION
30	CONVENTION CENTER STATION
95	OTHER **(SPECIFY)**
98	DON'T KNOW
99	REFUSED

RANDOMIZE IN1A TO IN1K

IN1 How often do you use each of the following to get information regarding Metro? Would you say frequently, sometimes, rarely, or never?

IN1A Printed timetables

IN1B Metro Online (**AS NEEDED:** Metro Transit's website @ www.metro.kingcounty.gov)

IN1C Information posted at stops, transit centers, park-and-ride lots

IN1D Metro alerts via text messages

IN1E Metro alerts via e-mail

IN1G Metro's Online Regional Trip Planner

IN1H Tweets from Metro (**AS NEEDED:** @KCMetroBus)

IN1I Metro's Facebook

IN1J Metro Matters Blog

IN1K Metro's Customer Service Call Center (**AS NEEDED:** 206-553-3000)

04 FREQUENTLY
03 SOMETIMES
02 RARELY
01 NEVER
98 DON'T KNOW
99 REFUSED

IN3   Are you satisfied or dissatisfied with each of following items?
    (FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

    IN3A   Overall ability to get information about Metro's routes and schedules

    IN3B   Ability to get current printed timetables for routes

    IN3C   Availability of service information on Metro Online (**AS NEEDED:** Metro's website)

    IN3D   Accuracy or reliability of printed timetables

    IN3F   Website posting of service delays or other problems

    IN3G   Alerts via e-mail or text messaging regarding service delays or other problems

    IN3H   Availability of information about Metro in Spanish

      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

IN5   As you may know, Metro performs regular service changes to improve routing and to address budget issues. Please tell me, are you satisfied or dissatisfied with each of following items regarding service changes?
(FOLLOW-UP) Would that be very or somewhat (satisfied/dissatisfied)?

IN5A   Notification of service changes

ASK IN5A_1 and IN5A_2 IF IN5A LE 4

IN5A_1 Timeliness of service change notifications

IN5A_2 Communications from Metro regarding the reasons for service changes

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

IN5B   How do you currently hear about service changes to Metro?
(READ LIST; SELECT ALL THAT APPLY]

04	Notice at bus stop
05	Notice on the bus
06	Email
11	Community or Public Meeting
01	TV news
02	Radio
03	Newspaper
08	Metro Online / Metro's Website
09	Seattle Transit Blog
07	Social Media (FACEBOOK / TWITTER)
10	OTHER WEBSITE **(SPECIFY)**
92	I AM NOT CURRENTLY INFORMED
95	OTHER **(SPECIFY)**
98	DON'T KNOW
99	REFUSED

IN5C   How would you prefer to **get information** regarding service changes to Metro?
            (DO NOT READ LIST; SELECT ALL THAT APPLY)

            04   NOTICE AT BUS STOP
            05   NOTICE ON BUS
            06   EMAIL
            11   COMMUNITY OR PUBLIC MEETING
            01   TV NEWS
            02   RADIO
            03   NEWSPAPER
            08   METRO ONLINE / METRO'S WEBSITE
            09   SEATTLE TRANSIT BLOG
            07   SOCIAL MEDIA (FACEBOOK / TWITTER)
            10   OTHER WEBSITE **(SPECIFY)**
            94   I WOULD NOT PREFER TO GET ANY INFORMATION FROM METRO
            95   OTHER **(SPECIFY)**
            98   DON'T KNOW
            99   REFUSED

IN5F   How would you prefer to **provide input** to Metro regarding future service changes?
            (READ LIST IF NECESSARY; SELECT ALL THAT APPLY)
            01   EMAIL
            02   PHONE
            03   SOCIAL MEDIA (FACEBOOK / TWITTER)
            04   TOWN HALL TYPE MEETING
            05   METRO ONLINE / METRO'S WEBSITE
            94   I DON'T WANT TO PROVIDE INPUT TO METRO
            95   OTHER **(SPECIFY)**
            98   **(NEVER READ)** DON'T KNOW
            99   **(NEVER READ)** REFUSED

IN5D   Have you contacted Metro regarding service changes?

            01   YES
            02   NO
            98   DON'T KNOW
            99   REFUSED

ASK IN5E IF IN5D=2

IN5E   Do you know how to contact Metro to provide your opinion about proposed service changes?

        01   YES
        02   NO
        98   DON'T KNOW
        99   REFUSED

ASK IN4A IF (TEL2= 01, 98, 99) OR SAMPLETYPE=03 (RDD CELLPHONE)

IN4A   Do you own a SmartPhone?

        01   YES
        02   NO
        98   DON'T KNOW
        99   REFUSED

ASK IN4B_1 IF IN4A = 01

IN4B_1   How often do you use your SmartPhone to obtain information about Metro? Would you say. . .

        04   Frequently
        03   Sometimes
        02   Rarely
        01   Never
        98   DON'T KNOW
        99   REFUSED

ASK IN4F_2 IF IN4B_1 = 03, 04

IN4F_2   Are you aware of the digital image called a QR Code posted <u>on Rider Alerts **on the bus**</u> that you can use to connect to Metro Online for more detailed information?
(**IF YES ASK:** Have you used this service?)

        01   YES AWARE / HAVE NOT USED
        02   YES AWARE / YES HAVE USED
        03   NOT AWARE
        98   DON'T KNOW
        99   REFUSED

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 **[ME]**
           99   REFUSED **[ME]**

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 CS2A IF CS1 = 01

CS2A   How many days a week do you work?

      _____   ENTER NUMBER OF DAYS **[RANGE: 1-7, 98, 99] [ALLOW DECIMALS]**
        98   DON'T KNOW
        99   REFUSED

ASK CS2B IF CS2A > 0

CS2B   How many days a week do you travel to work, that is, **you work outside your home?**

      _____   ENTER NUMBER OF DAYS **[RANGE: 0-7, 98, 99] [ALLOW DECIMALS]**
        98   DON'T KNOW
        99   REFUSED

ASK CS2C IF CS2B > 0 AND (RIDESTAT =01, 02)

CS2C   Of the [RESTORE ANSWER TO CS2B] days that you travel to work, how many days do you take a Metro bus or the South Lake Union Streetcar as part of that commute?

      _____   ENTER NUMBER OF DAYS **[RANGE: 0-RESPONSE TO CS2C, 98, 99] [ALLOW DECIMALS]**
        98   DON'T KNOW
        99   REFUSED

ASK CS3A IF CS1 = 02

CS3A   How many days a week do you **attend school**?

      _____   ENTER NUMBER OF DAYS **[RANGE: 1-7, 98, 99] [ALLOW DECIMALS]**
        98   DON'T KNOW
        99   REFUSED

ASK CS3B IF CS3A > 0

CS3B   How many days a week do you travel to school, that is, **you attend class outside your home?**

        _____   ENTER NUMBER OF DAYS **[RANGE: 0-7, 98, 99] [ALLOW DECIMALS]**
        98   DON'T KNOW
        99   REFUSED

ASK CS3C IF CS3B > 0 AND (RIDESTAT =01, 02)

CS3C   Of the [RESTORE ANSWER TO CS3B] days that you travel to school, how many days do you take a Metro bus or the South Lake Union Streetcar as part of that commute?

        _____   ENTER NUMBER OF DAYS **[RANGE: 0- RESPONSE TO CS3B, 98, 99] [ALLOW DECIMALS]**
        98   DON'T KNOW
        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
       CS2A = 0 OR CS3A = 0) OR (CS2B <3 AND CS3B < 3) OR (CS1 = 03 , 04, 05, 94, 95, 98, 99)

C1   In what geographic area do you [work/attend school]?
(READ LIST <u>UNTIL VALID RESPONSE GIVEN</u>; SELECT SINGLE RESPONSE)

01	Downtown Seattle Core
00	South Lake Union
02	Other areas surrounding Downtown Seattle (**AS NEEDED:** This includes Pioneer Square, Belltown, International District, Capitol Hill, First Hill, and Denny Regrade)
03	University District
11	On the UW **(PRON: YOU-DUB)** campus
04	Other areas in North King County
05	Downtown Bellevue
06	Redmond
07	Other areas in East King County
12	Renton
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

ASK C1A IF C1 = 02

C1A   Would that be . . .
(READ LIST <u>UNTIL VALID RESPONSE GIVEN</u>; SELECT SINGLE RESPONSE)

02	Denny Regrade
03	Belltown
04	Pioneer Square
05	International District
06	Duwamish **(PRON: doo-WAH-mish)**
07	SODO
08	Queen Anne
10	Capitol Hill
11	First Hill
95	Somewhere else surrounding Downtown Seattle? **(SPECIFY)**

97   VARIES
        98   DON'T KNOW
        99   REFUSED

C1B   Would that be . . .
           (READ LIST <u>UNTIL VALID RESPONSE GIVEN</u>; SELECT SINGLE RESPONSE)

           03   Fremont
           04   Ballard
           05   Northgate
           06   Kenmore
           07   Shoreline
           08   North Seattle
           09   Somewhere else in North King County? **(SPECIFY)**
           97   VARIES
           98   DON'T KNOW
           99   REFUSED

C1C   Would that be . . .
           (READ LIST <u>UNTIL VALID RESPONSE GIVEN</u>; SELECT SINGLE RESPONSE)

           02   Kirkland
           04   Overlake
           05   Eastgate
           06   Issaquah **(PRON: ISS-a-kwah)**
           07   Bothell
           08   Woodinville
           09   Mercer Island
           01   Bellevue, not including downtown
           95   Somewhere Else in East King County? **(SPECIFY)**
           97   VARIES
           98   DON'T KNOW
           99   REFUSED

C1D   Would that be . . .
         (READ LIST UNTIL VALID RESPONSE GIVEN; SELECT SINGLE RESPONSE)

         01   Auburn
         02   Federal Way
         03   Kent
         05   Tukwila **(PRON: tuck-WILL-a)**
         06   Southcenter
         07   SeaTac
         95   Somewhere else in South King County? **(SPECIFY)**
         97   VARIES
         98   DON'T KNOW
         99   REFUSED

ASK C2A IF (CS2C < C2SB) OR (CS3C < CS3B) OR RIDESTAT=03

IF (CS2C GE CS2B) OR (CS3C GE CS3B) AUTOCODE C2A AS 04

C2A   How do you usually get to and from [work/school]?
         (IF DRIVE, ASK: Would that be alone, with at least 2 people in the car **(CODE AS CARPOOL)**, in a vanpool with 7 or more people, or on a motorcycle?)
         (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 commute mode?)
         (READ LIST ONLY IF NECESSARY; SELECT ALL THAT APPLY)
         01   DRIVE ALONE
         02   CARPOOL (2 OR MORE PEOPLE IN CAR)
         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
         95   OTHER **(SPECIFY)**

98	**(NEVER READ)** DON'T KNOW
99	**(NEVER READ)** REFUSED

<div style="border:1px solid red">

ASK C2B IF MULTIPLE RESPONSES TO C2A (AND ONLY DISPLAY ITEMS SELECTED AT C2A)

IF C2A IS SINGLE RESPONSE AUTOCODE C2B

IF (CS2C GE CS2B) OR (CS3C GE CS3B) AUTOCODE C2B AS 04

</div>

C2B   What do you consider the **primary** mode you use on your commute trip?
(**AS NEEDED:** What do you use for the longest part of your commute trip?)
(**READ LIST ONLY IF NECESSARY; SELECT SINGLE RESPONSE**)

01	DRIVE ALONE
02	CARPOOL (2 OR MORE PEOPLE IN CAR)
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
95	OTHER **(SPECIFY)**
98	**(NEVER READ)** DON'T KNOW
99	**(NEVER READ)** REFUSED

ASK C3A IF GROUP = 02, 04, 06, 08, 10, 12

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

ASK C3A IF GROUP = 02, 04, 06, 08, 10, 12

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

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

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

C9D   Does your [employer / school] pay for some or all of your parking?

       01   YES, ALL
       02   YES, SOME
       03   NO
       98   DON'T KNOW
       99   REFUSED

C10A   Overall, how appealing to you personally is the idea of **using** Metro to get to [work/school]? Would you say…

        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

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 MORE THAN ONE RESPONSE PROBE FOR WHICH IS USED MOST OFTEN**)
          (**IF DRIVE, ASK:** Would that be alone, 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 IS NECESSARY; SELECT SINGLE RESPONSE**)

          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
          95   OTHER **(SPECIFY)**
          98   **(NEVER READ)** DON'T KNOW
          99   **(NEVER READ)** REFUSED

PT2A Overall, how appealing to you personally is the idea of **using** Metro for your personal travel? Would you say..

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

PT2A_1 If **convenient transit service** was available to places you go for your personal travel, 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 GW1A IF RIDESTAT EQ 01 OR 02

GW1A   Overall, would you say you are satisfied or dissatisfied with Metro?
        (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 GW5 IF GROUPS EQ 01, 03, 05, 07, 09, 11
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)?
(READ QUESTION AS WRITTEN. DO NOT READ RESPONSE LIST. "NEITHER AGREE NOR DISAGREE / NO OPINION / DON'T FEEL ONE WAY OR THE OTHER, ETC." IS AN ACCEPTABLE ANSWER)

    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_3   Compared with driving alone, riding Metro can save me a lot of money

    GW5_4   Riding Metro is less stressful than driving

    GW5_5   I can do other things while I am on the bus; it's not just dead time

    GW5_6   Riding Metro gives me the opportunity to do something good for the environment

    GW5_7   Is an agency I like and respect

    GW5_8   Is an agency I trust

ASK GW5_9 IF RIDESTAT EQ 01 OR 02

GW5_9   I like to be able to say I ride Metro

     01   STRONGLY DISAGREE
     02   SOMEWHAT DISAGREE
     03   NEITHER AGREE NOR DISAGREE / NO OPINION
     04   SOMEWHAT AGREE
     05   STRONGLY AGREE
     97   NOT APPLICABLE
     98   DON'T KNOW
     99   REFUSED

ASK GW6 IF GROUPS EQ 02, 04, 05, 08, 10, 12

RANDOMIZE GW6 SERIES

GW6   Based on anything you have seen, heard, or directly experienced please tell me if you agree or disagree with each of the following statements. **(FOLLOW-UP)** Would that be strongly or somewhat (agree/disagree)?
(READ QUESTION AS WRITTEN. DO NOT READ RESPONSE LIST. "NEITHER AGREE NOR DISAGREE / NO OPINION / DON'T FEEL ONE WAY OR THE OTHER, ETC." IS AN ACCEPTABLE ANSWER)

    GW6A   Metro operates equipment that is modern and up-to-date

    GW6A   Metro offers good value for the level of service provided

    GW6A   Metro is a leading public transportation agency

    GW6A   Metro provides excellent customer service

    GW6A   Metro is innovative

    GW6A   Metro is socially and environmentally responsible

    GW6A   Metro has consistently high standards for the quality of service they provide

    GW6A   Metro values its customers

01	STRONGLY DISAGREE
02	SOMEWHAT DISAGREE
03	NEITHER AGREE NOR DISAGREE / NO OPINION
04	SOMEWHAT AGREE
05	STRONGLY AGREE
97	NOT APPLICABLE
98	DON'T KNOW
99	REFUSED

BASE FOR GW7: ALL RESPONDENTS

GW7   Based on anything you have seen, heard, or directly experienced, which of the following statements best describes how you feel about Metro?
(INTERVIEWER NOTE: STOP AFTER RESPONDENT PICKS A RESPONSE)

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 have a positive attitude toward them
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

DEMO   Finally, I have some background questions that will be used to help us analyze the results of the study.

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 S3 > 1 AND D3B > 0 AND D3A = 01

D3C   Is one of these vehicles available for **your personal use**?

            01   YES
            02   NO VEHICLES AVAILABLE FOR PERSONAL USE
            98   DON'T KNOW
            99   REFUSED

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.**)
        (**READ LIST; SELECT ALL THAT APPLY**)

01   White
02   Black or African American
03   American Indian or Alaskan Native
04   Asian or Pacific Islander
94   HISPANIC
95   OTHER **(SPECIFY)**
98   DON'T KNOW
99   REFUSED

ASK D5 IF S7 = 98, 99

D5   Is your total annual household income above or below $35,000 per year?

01   BELOW $35,000 PER YEAR
02   ABOVE $35,000 PER YEAR
98   DON'T KNOW
99   REFUSED

ASK D5A IF S7 EQ 01 OR D5 EQ 01

D5A   **[SHOW FOR ALL]** Earlier you indicated that your total household income was less than $35,000. 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 IF S7 EQ 2 OR D5 EQ 02

D5B Earlier you indicated that your total household income was above $35,000 per year. 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

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**)

THANK   That concludes our survey. Thank you very much for your time and the useful information you have provided us. **[COMPLETES]**

THANK2   Thank you for your time. We appreciate your cooperation in agreeing to complete this survey. Today we are only interviewing residents of King County. **[NQ-NON-RESIDENT]**

THANK3   Thank you for your time. We appreciate your cooperation in agreeing to complete this survey. However, we are only interviewing residents 16 years of age or older. **[NQ - UNDER 16]**

THANK4   Thank you for your time. We appreciate your cooperation in agreeing to complete this survey. However, we are only interviewing those who currently ride King County Metro. **[NQ – NONRIDERS / RIDER ONLY SAMPLE]**

THANK5   Thank you for your time, but we are unable to continue without that information. **[SCREENER REFUSALS]**

THANK99 Thank you very much for answering those questions. We appreciate your cooperation. **[ALL OTHER TERMINATIONS]**

STOP SCREEN   **INTERVIEWER INSTRUCTIONS**

PLEASE COLLECT THE NAME OF THE PERSON THAT WE NEED TO CALLBACK AND SCHEDULE A CALLBACK IN QUANCEPT.

THEN ARROW FORWARD ONCE ON THE WEB AND CLOSE YOUR BROWSER.
[RESCREENING]

[RESIDENTIAL ZIP CODE LIST]

Seattle / North King	South King	East King
98101 98102 98103 98104 98105 98106	98001 98002 98003	98004 98005 98006 98007 98008 98009
98107 98108 98109	98010	98011
98112	98022 98023	98014 98015
98115 98116 98117 98118 98119	98025	98019 98024
98121 98122	98030 98031 98032 98035	98027 98028 98029
98124 98125 98126	98038	98033 98034
98133 98134	98042	98039 98040 98041
98136	98045	98050
98144 98145	98047 98051 98054 98055 98056 98057	98052 98053
98154 98155	98058 98059	98065
98160	98062 98063 98064	98072
98164	98070 98071	98074 98075
98177	98092 98093	98077
98181	98138	98083
98185	98146	98224
98191	98148	98288
98195	98158	
98199	98166	
	98168	
	98178	
	98188	
	98198	
	98354	
Includes residential zip codes. Zip codes designated as a PO are valid zip codes and should be included in the list of qualified zip codes for the questionnaire. They have 0 population so are not "sampled."		

King County METRO

DETAILED ANALYTICS: BANNERS

Banner cross-tabulations are provided under separate cover.   The following outlines the banner points selected.

Banner Number	Banner Title	Description	Weighted by:
1	All King County	Differences by Area Residence, Individual Rider Status, Non-Riders, Non-Riders: Former Metro Riders, Commute Status	RESPWT
2	Area of Residence: Seattle / North King County	Differences by Area Residence, Individual Rider Status, Non-Riders, Non-Riders: Former Metro Riders, Commute Status	RESPWT
3	Area of Residence: South King County	Differences by Area Residence, Individual Rider Status, Non-Riders, Non-Riders: Former Metro Riders, Commute Status	RESPWT
4	Area of Residence: East King County	Differences by Area Residence, Individual Rider Status, Non-Riders, Non-Riders: Former Metro Riders, Commute Status	RESPWT
5	King County Commuters	Differences by Area of Residence, Individual Rider Status, Commute Status, Work Location Primary Commute Mode, Potential to Commute by Metro	RESPWT
6		*Banner 6 ended up being dropped.*	
7	Trends Riders & Non-Riders (2009, 2011, 2013) Overall and Differences by Rider Status	2009, 2011, 2013 Total, All Riders, Regular Riders, Infrequent Riders, Non-Riders	RESPWT
8	Trends Riders & Non-Riders (2009, 2011, 2013) Overall and Differences by Area of Residence	2009, 2011, 2013 Total, Seattle / N. King, South King, East King	RESPWT
9	All King County Riders Only	Differences by Area Residence, Individual Rider Status, Riders: Frequency of Riding, Riders: Fare Payment, Riders: Tenure Riding, Commute Status, Rider Satisfaction	RIDERWT
10	Trends Riders Only (2009, 2010, 2011, 2012, 2013) Overall and Differences by Rider Status	2009, 2010, 2011, 2012, 2013 Total, All Riders, Regular Riders, Frequent Regular Riders, Moderate Regular, Infrequent Riders	RIDERWT
11	Trends Riders Only (2009, 2010, 2011, 2012, 2013) Overall and Differences by Area of Residence	2009, 2010, 2011, 2012, 2013 Total, Seattle / N. King, South King, East King	RIDERWT
12	Households	Differences by Area Residence, Household Rider Status	HHWT3