King County Metro Transit
2019 Rider and Non-Rider Survey

March 2020
Research conducted for:
Metro Transit Department

Objectives, Methodology & Regional Sub-areas

Survey Objectives

▸ Measure riders' overall satisfaction with King County Metro Transit's services

▸ Gauge riders' satisfaction with various elements of bus services (including time performance, level of service, safety, operator performance, fare payment, transfers, comfort and cleanliness, information, and park and ride satisfaction)

▸ Measure Metro marketshare and transit usage

▸ Understand ridership barriers and potential transit interest among non-riders

▸ Identify demographic and geographic characteristics of riders and non-riders

Approach Overview

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▸ This report reflects the data collected between January 11, 2019 and December 31, 2019.

▸ As of February 2020: 6,885 total respondents (n); Margin of Error: ±1.2 percentage points

▸ Random Address Based Sample (ABS) of all residential postal addresses in the King County Metro service area.

▸ The surveys are initiated by a mailed postcard and administered as a multimodal online and telephone survey.

▸ The survey is offered in English, traditional Chinese, Spanish, Vietnamese, and Somali languages.

▸ Responses are weighted by key demographics to reflect the most recent Census American Community Survey estimates for residential households in the King County Metro service area.

▸ Data is stratified and weighted within three predefined County sub-areas using the Census estimates for all residents including riders and non-riders.

  • The following results have been weighted to reflect the proportional age, gender, income, ethnicity, household language, and geography according to the Census American Community Survey (ACS) estimates.

Approach Overview

▸ Interviews are stratified across three regional sub-areas: Seattle/North King (2,137n), South King (2,693n) and East King (2,055n) County. Respondents were classified into three core usage categories:

- Regular Riders (1,382n) - defined as King County residents, 16 or older, who made 5 or more transit trips on a Metro bus or streetcar in the last 30 days.

- Infrequent Riders (806n) - defined as King County residents, 16 or older, who made 1 to 4 transit trips on a Metro bus or streetcar in the last 30 days.

- Non-Riders (4,697n) – defined as King County residents, 16 or older, who have not taken any rides on a Metro bus in the last 30 days.

▸ Previous Metro rider/non-rider studies were conducted by Random Digit Dial (RDD) telephone interviewing.

Caveats

▸ The 2019 study is a multi-modal address-based sampling (ABS) survey which includes a robust, random sample of all residential households in the Metro service area. Respondents were given options to take the survey online or by telephone.

▸ Prior to 2018, the survey was conducted via telephone only using Random Digit Dial (RDD) sampling. The survey was also introduced as a research effort on behalf of King County Metro, specifically. In an attempt to encourage the participation of all residents and avoid disclosing the specific topic of the survey up front, this year's version was introduced as a general survey of King County residents on behalf of the County. These differences may have some potential effect on some of the year-to-year tracking comparisons highlighted in this report.

▸ Additionally, for each of the service satisfaction elements tested in the online version of the survey, these questions allowed respondents to indicate whether they had no opinion or it did not apply to them. For a few of the elements, a greater share of respondents chose the "No opinion" and "Not applicable" options in 2019 compared to 2018 ABS survey and previous years' phone-only versions of the survey.

▸ For the service satisfaction reporting and Key Driver Analysis, respondents who stated that a particular element did not apply to them were removed from the reported results for that element.

Regional Sub-areas

Unweighted n	King Countywide	Seattle/ North King	South King	East King
Total n	6,885	2,137	2,693	2,055
Margin of Error (+/-)	+/-1.2%	+/-2.1%	+/-1.9%	+/-2.2%
Total Riders	2,188	1,225	441	522
Margin of Error (+/-)	+/-2.1%	+/-2.8%	+/-4.7%	+/-4.3%
Regular Riders	1,382	845	248	289
Infrequent Riders	806	380	193	233
Non-Riders	4,697	912	2,252	1,533
Margin of Error (+/-)	+/-1.4%	+/-3.2%	+/-2.1%	+/-2.5%

Weighted Sub-area %

Seattle/ North King 35%

East King 29%

South King 36%

Seattle Sub-areas

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Unweighted n's		Seattle Citywide	North Seattle	Central Seattle	South Seattle
Total n		2,072	962	649	418
	Margin of Error (+/-)	+/-2.2%	+/-3.2%	+/-3.8%	+/-4.8%
Total Riders		1,201	550	419	219
Total Non-Riders		871	412	230	199

Weighted Sub-area %
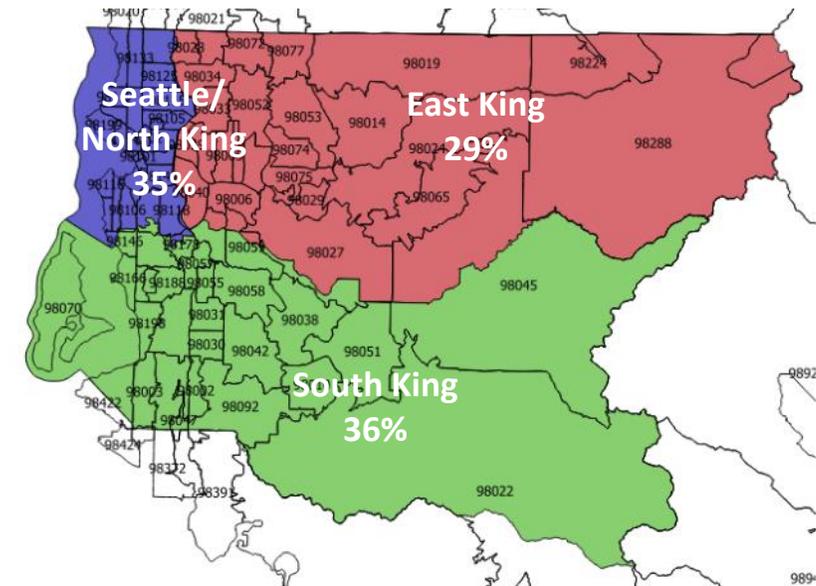
Quarterly Data

	Overall 2018*	Overall 2019*
Total n	3,377	6,885
Margin of Error (+/-)	+/-1.7%	+/-1.2%
Total Riders	1,159	2,188
Margin of Error (+/-)	+/-2.9%	+/-2.1%
Regular Riders	780	1,382
Infrequent Riders	379	806
Non-Riders	2,218	4,697
Margin of Error (+/-)	+/-2.1%	+/-1.4%

*Overall 2018 data has been collected mostly in quarter 4.
*Overall 2019 data has been collected in quarters 1,2 and 4.

EXECUTIVE SUMMARY

Summary of Findings

Findings – Overall Satisfaction

▸ Nine-in-ten riders continue to be either very or somewhat satisfied with King County Metro, overall. Overall satisfaction with the Agency has not significantly changed since 2018 but the positive intensity underlying the 2019 ratings is slightly higher (28→30% very satisfied).

▸ Overall satisfaction with King County Metro. Positive intensity is consistently high across major rider subgroups, with at least four-in-five rating the agency positively. Positive intensity is highest for ORCA LIFT users (39% very satisfied) and those reliant on Metro for most of their transportation needs (36%). Riders in South Seattle (22% very satisfied) give Metro a lower rating than people living in other parts of King County.

▸ Overall satisfaction is comparably high across major demographic subgroups. Ratings intensity is highest among lower-income riders at or below 200% of the Federal Poverty Level (40% very satisfied) and riders age 55 or older (37%). Ratings intensity is slightly lower among riders in households making $100K/year (27% very satisfied), riders age 35-54 (25%), and women age 16-44 (26%) but nearly nine-in-ten riders from these subgroups give Metro at least a somewhat satisfied rating.

Findings – Improvement Priority Elements

▸ Similar to their relative key driver positioning in 2018, the top service improvement priorities continue to be **availability of service**, **bus frequency**, **travel time**, and **on-time performance**. These elements have some of the strongest impacts on overall satisfaction with Metro but also receive lower ratings relative to those higher standards.

▸ Of the 46 individual elements tested in the 2018 survey, 19 have been identified as priorities for improvement in the Key Driver Analysis. For this summary, these items have been separated into two categories: resource needs improvements and current resources improvements.

▸ The key improvement drivers are led by the level of service elements described above but also includes a mix of comfort and cleanliness, information, and transfer-related elements. Most of these improvement items are likely contingent on additional resource needs. However, some of the information-related improvement priorities – including **info about service changes**, **availability of information online**, **notifications of temporary** and **long-term service changes**, **info posted at stops**, **the ability to give feedback**, and **website postings of delays** – may have a better chance of being addressed with current resources.

Findings – Promotion Focus Elements

▸ Each of the operator and fare payment elements are among the highest-rated elements tested in the survey. The following items are potential elements which positively influence riders' overall satisfaction with Metro and the agency can promote as key strengths of its service.

- **Value of service**
- **Operators' handling of problems**
- **Daytime safety at stops**
- **Daytime safety on-board**
- **Operators' smooth starts/stops when driving**

▸ There are a few additional elements which perform comparatively better than other similar elements but also slightly underperform their relatively high influence on agency satisfaction. These include the **overall ability to obtain information**, **on-board cleanliness**, and **the availability of information on mobile devices**. For all intents and purposes, these are worth monitoring and could be considered borderline priorities for improvement.

Findings – Maintenance Elements

▸ **Overall ORCA cards**, **the ease of paying fares**, **courtesy of bus operators**, and **operator safety while driving** are highest-rated elements in the survey. Their satisfaction ratings significant overperform relative to their impacts on overall service satisfaction. Maintaining satisfaction with these attributes is important but robust improvement efforts may yield limited returns towards improving overall satisfaction as riders are already very happy with the performance of these elements.

▸ Additional elements in this category include:

- **Distance to nearest bus stop**

- **Operator helpfulness**

- **Number of transfers**

- **Ease of adding value to ORCA cards**

- **Ease of loading pass to ORCA cards**

- **Vehicle safety at Park & Rides**

- **Personal safety at Park & Rides**

▸ There are other elements which are relatively lower rated but also have a weaker impact on riders' overall satisfaction with Metro. These items are worth monitoring for the future and include:

- **Text alerts of delays**

- **Email alerts of delays**

- **Nighttime safety at stops**

- **Nighttime safety with others on board**

- **Nighttime service frequency**

- **The availability of parking at Park & Rides**

▸ In general, a vast majority of the individual element satisfaction ratings in the survey have remained unchanged since 2018. Some elements have seen negligible shifts in either overall satisfaction (very + somewhat satisfied %) or positive intensity (very satisfied % only) but those shifts do not dramatically exceed the margin of error.

Findings – Marketshare & Ridership

▸ Over two-in-five households in Metro's service area report having someone who has taken a Metro bus at least once in the last 30 days. This share is highest in Seattle/North King and lowest in South King. The household ridership shares are comparable to their 2018 levels.

▸ Just over a third of survey respondents rode a Metro bus in the last 30 days, including a quarter who rode regular (taken Metro 5 times or more). This share is highest in Seattle/North King, where a majority report riding Metro, including two-fifths who were regular riders.

▸ Riders use Metro for a diverse mix of reasons but commuting is the most common. Just over half of riders primarily use Metro buses to commute to and from work, followed by just under a fifth for recreation or social-related trips and one-in-ten for errands and shopping.

▸ Regarding Metro reliance, a majority of riders from lower-income households rely on Metro for most or all of their travel needs around the county. At least 2-in-5 riders with a disability, from primarily non-English speaking households, people of color, and younger riders also rely on Metro for most of their local travel.

Findings – Fare Payment

▸ Four-in-five riders typically use ORCA cards to pay their bus fare compared to about one-in-ten who use cash. These shares have diverged steadily since 2013 as ORCA usage continues to replace cash and ticket usage.

▸ Half of cash/paper ticket users do not believe they ride often enough to make ORCA worthwhile. Additionally, more than one-in-ten say it's easier to pay with cash/tickets, do not think there are enough locations to purchase a pass or add e-purse value, or simply haven't had time to buy an ORCA card.

▸ Two-thirds of riders identify as full-fare adults, followed by about one-in-six who are senior/65+ RRFP, along with smaller shares of students, ORCA LIFT users, and disabled RRFP users.

Findings – Non-Rider Perceptions of Metro

▸ Nearly three-in-five non-riders have a favorable opinion of Metro, compared to a quarter who view the agency unfavorably. The intensity (strongly %) of these ratings is relatively low, both positively and negatively. Just under a fifth have no opinion or are unsure how to rate Metro.

▸ Overall favorability is a few points lower than in 2018. This shift is very minor but it is worth monitoring for potential trends in the future.

▸ Agency favorability is highest among non-riders in Seattle/North with no significant difference in opinion by age, ethnicity, or income.

▸ Two-in-five non-riders at least somewhat agree they could see themselves using Metro if it were available for either their commute or personal trips. Intensity is highest for potential commute trips, where a fifth say they would be strongly likely to consider riding Metro for their commute at least once or twice per week.

Findings – Non-Rider Barriers & Incentives

‣ For those who do not use Metro, the most salient barriers to riding include the perceptions that the **bus takes too long** and **doesn't offer enough flexibility**. Most of the top-tier of barriers are issues which likely require additional capital resources to address, with the exceptions of a couple of information-based barriers including the **hassle of planning bus trips beforehand** and **uncertainty of how to reach travel destinations by bus**.

‣ When considering potential bus service changes and amenities, about a quarter or more say they would be much more likely to ride Metro more often if there was **faster bus service available for their trip**, **more routes serving where they need to go**, **real-time schedule info online** and **at stops**, **more routes within a quarter mile of their home and destination**, and **increased bus frequency**.

‣ About a third of residents in the survey are non-riders, have not recently used other local public transit services, and are at least somewhat interested in riding Metro if it were available for either their commute trips or personal trips.

‣ Lower income riders tend to give King County Metro higher marks for its overall service than those from higher income households. White and non-white riders are equally satisfied with Metro, overall.

‣ About one-in-ten riders in the survey report being LIFT eligible based on their age, income, and household size. Three quarters of them primarily use ORCA cards to pay their fare, with a quarter typically using cash.

‣ Nearly half of people of color and LIFT-eligible people – age 19-64 with household incomes below 200% of the Federal Poverty Level – report riding Metro at least once in the last 30 days. A greater share of these residents ride Metro than white and non LIFT-eligible residents.

‣ Among other LIFT-eligible Metro riders, nearly half identify as full-fare adult riders. Nearly one-in-five each consider themselves in the ORCA LIFT, disability RRFP, and student pass fare categories.

‣ When rating Metro's value of service for the fare paid, dissatisfaction is slightly higher among lower-income riders but strong majorities of riders in all income groups are satisfied with this aspect of Metro.

Overall Rider Satisfaction with King County Metro

Overall Metro Satisfaction – by Subgroup

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Overall satisfaction with the agency remains comparable across major rider subgroups in 2019. Positive intensity is slightly higher among ORCA LIFT users (39% very satisfied) and Metro-reliant riders (36%) but ratings are lower among people living in South Seattle (22% very satisfied).

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

Subgroup	Very Satisfied	Somewhat Satisfied	Dissatisfied	Total Sat.
Overall (n=2,188 MoE=2.1%)	30%	58%	11%	**88%**
Seattle/North King (n=1,225 MoE=2.8%)	29%	60%	10%	**89%**
South King (n=441 MoE=4.7%)	32%	56%	11%	**88%**
East King (n=522 MoE=4.3%)	31%	56%	12%	**87%**
North Seattle (n=550 MoE=4.2%)	31%	58%	9%	**89%**
Central Seattle (n=419 MoE=4.8%)	30%	59%	10%	**89%**
South Seattle (n=219 MoE=6.6%)	22%	64%	14%	**85%**
Frequent Regular Rider (n=920 MoE=3.2%)	32%	56%	11%	**88%**
Moderate Regular Rider (n=462 MoE=4.6%)	30%	62%	8%	**91%**
Infrequent Rider (n=806 MoE=3.5%)	27%	59%	12%	**86%**
ORCA card user (n=1,826 MoE=2.3%)	29%	59%	11%	**89%**
Cash/Tickets only (n=238 MoE=6.3%)	34%	51%	13%	**85%**
ORCA LIFT customer (n=105 MoE=9.6%)	39%	48%	11%	**87%**
Metro most/all trips (n=535 MoE=4.2%)	36%	54%	10%	**90%**
Metro little/some trips (n=1,649 MoE=2.4%)	27%	60%	11%	**88%**
Vehicle available (n=1829 MoE=2.3%)	29%	59%	11%	**88%**
No vehicle available (n=359 MoE=5.2%)	33%	57%	9%	**90%**

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

Overall Metro Satisfaction – by Subgroup

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There is also very little variation in overall satisfaction across demographic subgroups. Ratings intensity is highest among lower-income riders at or below 200% of the Federal Poverty Level (40% very satisfied) and riders age 55 or older (37%).

	Very Satisfied	Somewhat Satisfied	No opinion	Dissatisfied	**Total Sat.**
Overall (n=2,188 MoE=2.1%)	30%	58%		11%	**88%**
Male 16-44 (n=441 MoE=4.7%)	31%	56%		12%	**87%**
Male 45+ (n=570 MoE=4.1%)	31%	58%		9%	**90%**
Female 16-44 (n=429 MoE=4.7%)	26%	63%		10%	**89%**
Female 45+ (n=653 MoE=3.8%)	33%	55%		11%	**88%**
16-34 (n=496 MoE=4.4%)	30%	58%		11%	**88%**
35-54 (n=860 MoE=3.3%)	25%	61%		12%	**86%**
55+ (n=810 MoE=3.4%)	37%	54%		8%	**91%**
<$35k/year (n=231 MoE=6.4%)	38%	51%		11%	**89%**
$35k-$100k/year (n=763 MoE=3.6%)	30%	58%		10%	**89%**
+ $100k/year (n=933 MoE=3.2%)	27%	62%		11%	**89%**
At/Below 200% Federal Poverty (n=229 MoE=6.5%)	40%	49%		11%	**88%**
Above 200% Federal Poverty (n=1,697 MoE=2.4%)	28%	60%		10%	**89%**
White (n=1,468 MoE=2.6%)	30%	59%		11%	**89%**
POC (n=581 MoE=4.1%)	33%	57%		10%	**89%**
Primarily English HH (n=2,012 MoE=2.2%)	30%	58%		11%	**88%**
Other language HH* (n=98 MoE=9.9%)	32%	60%		7%	**92%**
Rider with disability* (n=144 MoE=8.1%)	32%	53%		15%	**85%**
Rider w/ no disability (n=2,033 MoE=2.2%)	30%	59%		11%	**88%**

Service Dimensions & Elements: Key Drivers Analysis

Key Drivers Analysis

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

By analyzing riders' overall satisfaction with Metro and their ratings for each of the individual service elements, we can estimate which items have the strongest impact on riders' overall level of satisfaction with the agency. For this analysis, we have converted each satisfaction into a 5-point scale (Very Satisfied=5, Somewhat Satisfied=4, No opinion=3, Somewhat Dissatisfied=2, and Very Dissatisfied=1) and run the mean rating for each element tested in the survey.

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

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

▸ **More important and lower rated – Focus on Improving**

▸ **More important and higher rated – Focus on Promoting**

▸ **Less important but higher rated – Maintain Satisfaction**

▸ **Less important and lower rated – Future Focus**

Key Drivers Analysis

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

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

More important and lower rated – Focus on Improving	**More important and higher rated – Focus on Promoting**
Less important and lower rated – Future Focus	**Less important and higher rated – Maintain Satisfaction**

Key Drivers Analysis – Service Dimensions

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FOCUS ON IMPROVING

FOCUS ON PROMOTING

Level of Service

Transferring

Comfort and Cleanliness

Information

Park and Ride

Fare Payment
Metro Operators

Personal Safety

FUTURE FOCUS

MAINTAIN SATISFACTION

Strength of Relationship

Level of Satisfaction
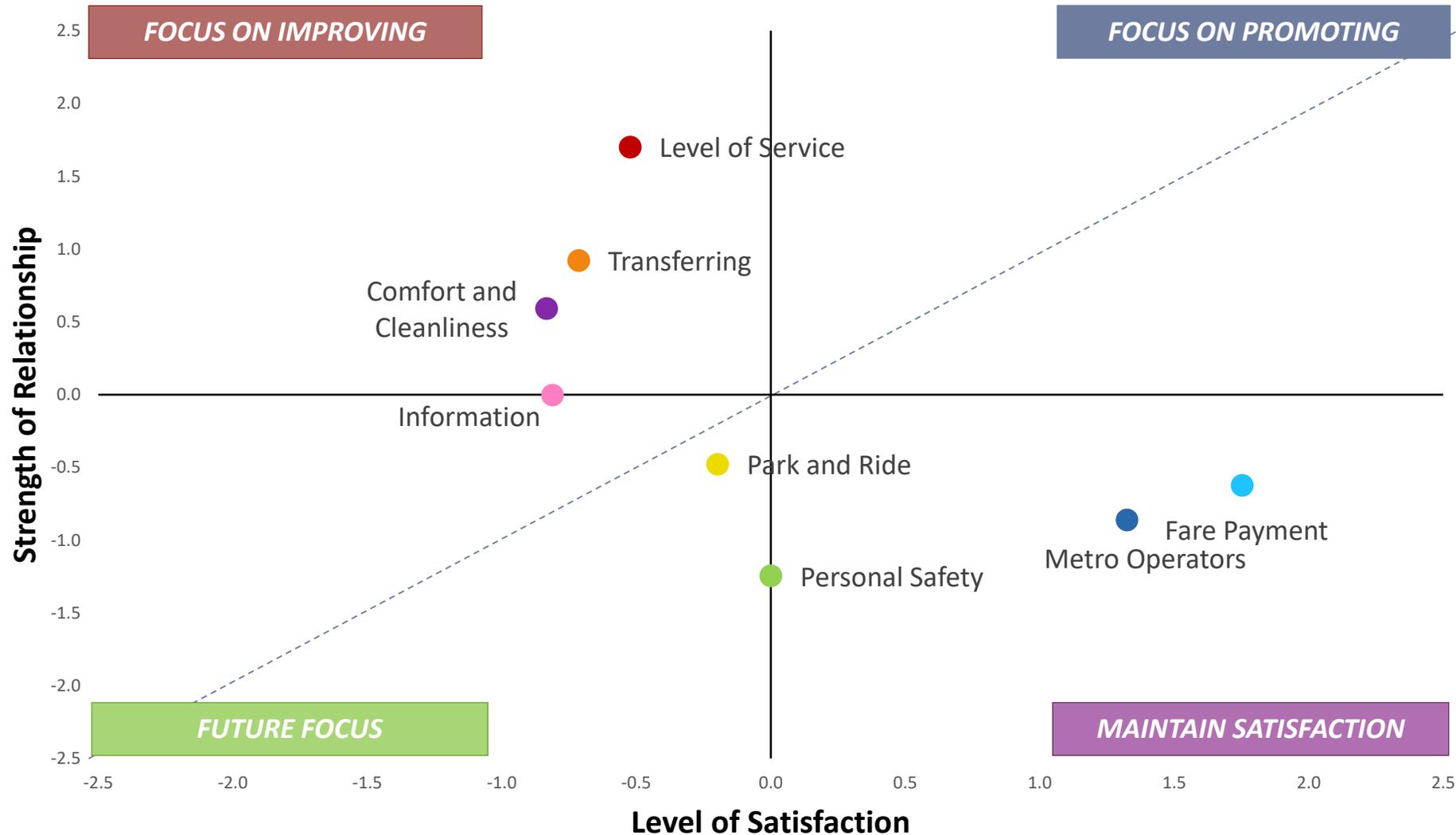
The broader dimensions in this quadrant graph are based on the combined ratings of the individual service element ratings highlighted on the following slides. In aggregate, the top improvement priorities include:

- *Level of Service*
- *Transfers*
- *Comfort and Cleanliness*
- *Information*

Although not the lowest-rated attributes, the *Level of Service* elements – including bus frequency, travel time, availability, and on-time performance – continue to underperform the most relative to their strength of impact on overall satisfaction with Metro.

Elements related to *Transfers*, *Comfort and Cleanliness*, and *Information* also receive relatively underperforming satisfaction ratings, on average, and round out the top four dimensions in terms of importance.

Riders give the highest ratings for *Fare Payment* and *Metro Operators*. Those, along with *Personal Safety* and *Park & Ride*, either perform at or above their relative impacts towards overall satisfaction.

Key Drivers Analysis – Individual Elements
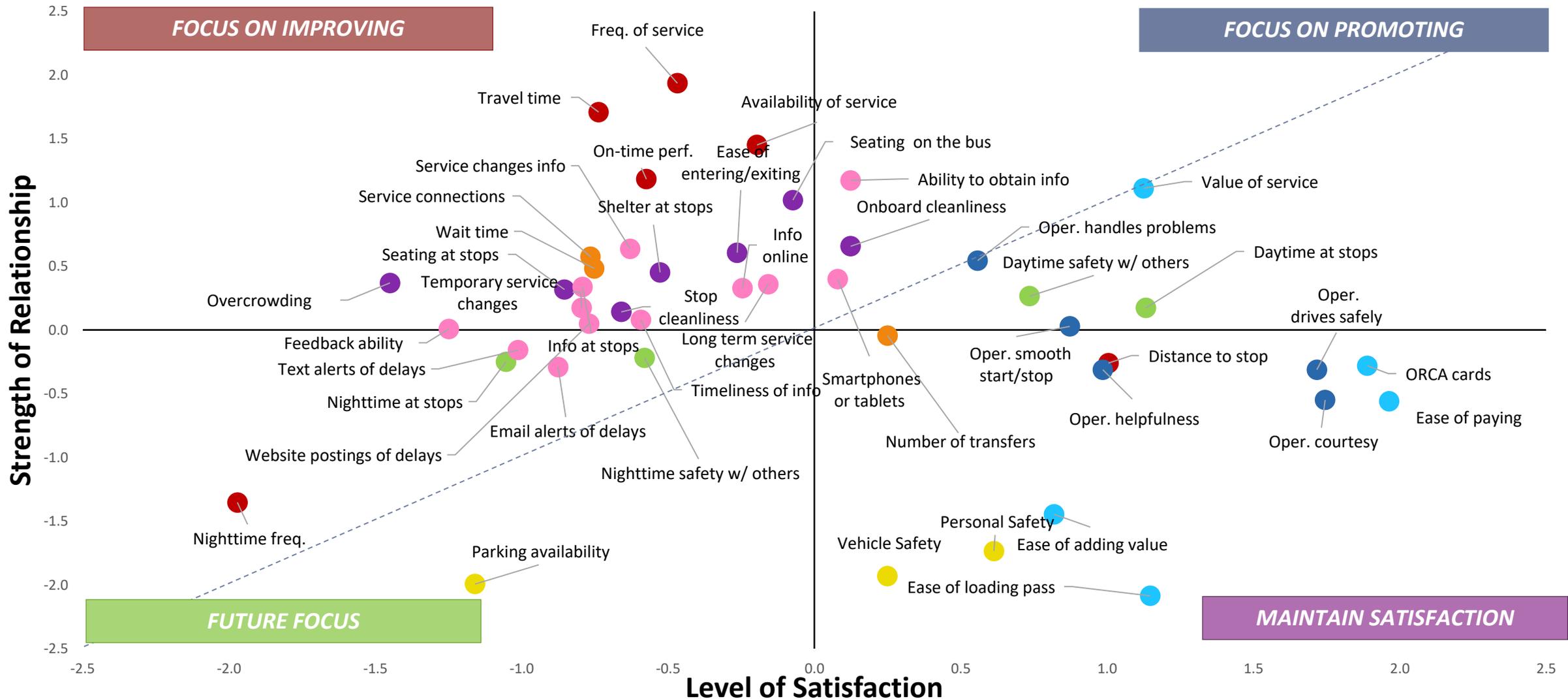
FOCUS ON IMPROVING

FOCUS ON PROMOTING

FUTURE FOCUS

MAINTAIN SATISFACTION

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▸ The individual elements outlined below include aspects of the service which have been flagged as key improvement priorities for the service. These elements have relatively high impacts on overall satisfaction with Metro and earn relatively lower satisfaction ratings among riders.

▸ Several level of service elements – including frequency of service, travel time, availability of service, and on-time performance – have the strongest impacts on overall satisfaction with King County Metro. With satisfaction ratings which underperform their respective levels of importance, these are the top improvement priorities identified in the survey.

▸ Other improvement priorities include a mix of elements from the comfort & cleanliness, information, and transfer dimensions. These include:

**Comfort & Cleanliness**	_**Information**_	_**Transfers**_
Seating availability on-board	Notification of service changes	Service connections
Ease of entering/exiting bus	Long-term service changes	Wait time
Shelter availability at stops	Info available at stops	
Overcrowding	Info available online	
Seating at stops	Temporary changes & disruptions	
Stop cleanliness	Timeliness of info	
	Web postings of delays	

KDA Findings – Future Focus

▸ A handful of individual service elements relatively underperform in terms of rider satisfaction but also have a relatively weaker effect on overall satisfaction with Metro. These items are worth monitoring as they could be improvement priorities in the future.

▸ A couple of personal safety elements fall into this category, including nighttime safety at stops and nighttime safety with others on-board. Both of these are in the middle-tier of importance and are on the cusp of being identified as improvement priorities.

▸ Although these information elements have a lower impact on overall satisfaction than the items listed earlier, both text and email alerts of delays are slightly underperforming their relative levels of importance. These are just slightly lower in importance than other items in the information service dimension.

▸ Nighttime service frequency and parking availability at park & rides are among the lowest-rated satisfaction items in the survey. However, they are also two of the elements with the least amount of impact on overall agency satisfaction.

KDA Findings – Focus on Promoting

▸ There are several individual service elements which earn relatively high satisfaction ratings and have strong impacts on overall satisfaction. These are generally aspects of the service which riders consider valuable factors in rating Metro positively.

▸ Some items – including the ability to obtain information, onboard cleanliness, and information via mobile – are rated higher than other elements in their respective service dimensions. However, these elements' satisfaction levels still slightly underperform their relatively high levels of importance. If satisfaction slips for these elements, they may be more concretely flagged as improvement priorities.

▸ The perceived value of service is one of the highest-impact elements tested and also received some of the highest satisfaction ratings. Other important elements, including how well operators solve problems, daytime safety at stops and on-board with others, and smoothness of starting/stopping, perform similarly well in terms of rider satisfaction.

KDA Findings – Maintenance

▸ There are a number of service elements which riders are largely satisfied with but are less crucial towards their overall satisfaction with Metro. These aspects of the service largely overperforming their relative impacts on satisfaction and riders do not generally consider them key areas of focus for service improvement.

▸ Some fare and operator-related items – including overall ORCA card satisfaction, ease of paying fares, operator courtesy, and safety of how operators drive – are the highest-rated elements tested in the survey. They are also in the middle of the pack in terms of how strongly they impact overall agency satisfaction relative to other attributes. These elements are significant KDA overperformers.

▸ Operator helpfulness, distance from home to the nearest bus stop, and number of transfers earn above average satisfaction ratings and are mid-tier contributors to overall satisfaction with the agency. In general, these elements perform at or slightly above their relative importance levels.

▸ Other elements receive comparably high ratings but have relatively low impacts on overall rider satisfaction. These include the ease of loading passes and adding value to ORCA cards, personal and vehicle safety at park & rides.

Key Drivers Analysis – Full Element List

Q	Service Dimensions and Elements	n	Importance Ranking	Very Satisfied %	Mean Satisfaction	Strategy
	Level of Service		**1**	**27%**	**3.65**	**Focus on Improving**
M7B	Frequency of service	2,174	1	26%	3.56	Focus on Improving
M7E	Travel time	2,179	2	22%	3.44	Focus on Improving
M7C	Availability of service	2,176	3	29%	3.68	Focus on Improving
M7A	On-time performance	2,171	4	21%	3.51	Focus on Improving
M7U	Distance to stop	2,175	5	58%	4.22	Maintain Satisfaction
M7B_5	Nighttime frequency	587	6	9%	2.89	Future Focus
	Transferring		**2**	**22%**	**3.58**	**Focus on Improving**
M12	Service connections	1,056	2	16%	3.43	Focus on Improving
M11	Wait time	1,061	1	16%	3.43	Focus on Improving
M9	Number of transfers	1,062	3	33%	3.88	Maintain Satisfaction
	Comfort & Cleanliness		**3**	**22%**	**3.54**	**Focus on Improving**
M7H	Seating availability on the bus	2,176	1	28%	3.74	Focus on Improving
M7G	Onboard cleanliness	2,180	2	29%	3.83	Focus on Promoting
M7J	Ease of entering/exiting	2,141	3	24%	3.65	Focus on Improving
M7T	Shelter availability at stops	2,146	4	20%	3.54	Focus on Improving
M7I	Overcrowding on-board	2,134	5	12%	3.12	Focus on Improving
M7Q	Seating availability at stops	2,091	6	19%	3.39	Focus on Improving
M7F	Stop cleanliness	2,158	7	20%	3.48	Focus on Improving
	Information		**4**	**20%**	**3.55**	**Future Focus**
IN3A	Ability to obtain	2,111	1	28%	3.83	Focus on Promoting
IN3K	Service changes	1,920	2	18%	3.49	Focus on Improving
IN3J	Smartphones or tablets	1,976	3	27%	3.81	Focus on Promoting
IN3N	Long term service changes	1,954	4	23%	3.70	Focus on Improving
IN3I	At stops	2,114	5	18%	3.42	Focus on Improving
IN3C	Online	1,999	6	23%	3.66	Focus on Improving
IN3M	Temporary service changes	1,933	7	19%	3.42	Focus on Improving
IN3K_1	Timeliness	1,839	8	20%	3.51	Focus on Improving
IN3F	Website postings of delays	1,850	9	17%	3.43	Focus on Improving
IN3L	Feedback ability	1,797	10	13%	3.21	Future Focus
IN3G_2	Text alerts of delays	1,405	11	15%	3.32	Future Focus
IN3G	Email alerts of delays	1,444	12	16%	3.38	Future Focus

Key Drivers Analysis – Full Element List (Cont'd)

Q	Service Dimensions and Elements	n	Importance Ranking	Very Satisfied %	Mean Satisfaction	Strategy
	Park & Ride		**5**	**31%**	**3.77**	**Future Focus**
PR3B	Personal Safety	882	1	36%	4.05	Maintain Satisfaction
PR3C	Vehicle Safety	700	2	33%	3.88	Maintain Satisfaction
PR3A	Parking availability	700	3	23%	3.60	Future Focus
	Fare Payment		**6**	**65%**	**4.46**	**Maintain Satisfaction**
F5G	Value of service	2,132	1	54%	4.28	Focus on Promoting
F5B	ORCA cards	1,865	2	71%	4.62	Maintain Satisfaction
F5A	Ease of paying	2,154	3	75%	4.65	Maintain Satisfaction
F5D	Ease of adding value	913	4	52%	4.14	Maintain Satisfaction
F5C	Ease of loading pass	362	5	59%	4.29	Maintain Satisfaction
F5B2	U-Passes*	123	6	77%	4.70	Maintain Satisfaction
	Operators		**7**	**53%**	**4.31**	**Maintain Satisfaction**
M7O	Handles problems	2,033	1	42%	4.02	Focus on Promoting
M7OO	Smooth start/stop	2,173	2	46%	4.16	Focus on Promoting
M7L	Helpfulness	1,989	3	50%	4.21	Maintain Satisfaction
M7M	Drives safely	2,183	4	64%	4.54	Maintain Satisfaction
M7K	Courtesy	2,179	5	64%	4.56	Maintain Satisfaction
	Personal Safety		**8**	**31%**	**3.84**	**Maintain Satisfaction**
PS2A	Daytime safety w/ others	2,167	1	40%	4.10	Focus on Promoting
PS2C	Daytime at stops	2,170	2	47%	4.28	Focus on Promoting
PS2B	Nighttime safety w/ others	1,971	3	22%	3.51	Future Focus
PS2D	Nighttime at stops	1,977	4	15%	3.30	Future Focus

*Small sample size

Individual Element Satisfaction

Individual Elements – Net Satisfaction Ranking

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Service Element	n	Total Satisfied (Very+ Smwt)	Total Dissatisfied (Very+Smwt)	Net Satisfied (Sat. over Dissat. +/-)	Service Element	n	Total Satisfied (Very+ Smwt)	Total Dissatisfied (Very+Smwt)	Net Satisfied (Sat. over Dissat. +/-)
FARE PAYMENT: U-Passes*	123	97%	3%	+95	C&C: Ease of entering/exiting	2,141	72%	25%	+47
OPERATORS: Courtesy	2,179	95%	3%	+92	LOS: Availability of service	2,176	73%	26%	+47
FARE PAYMENT: ORCA cards	1,865	95%	3%	+92	C&C: Shelter availability at stops	2,146	68%	27%	+40
OPERATORS: Drives safely	2,183	95%	4%	+91	LOS: On-time performance	2,171	69%	29%	+40
FARE PAYMENT: Ease of paying	2,154	95%	4%	+91	LOS: Frequency of service	2,174	69%	30%	+39
SAFETY: Daytime at stops	2,170	90%	7%	+83	INFO: Timeliness	1,839	56%	19%	+37
FARE PAYMENT: Value of service	2,132	87%	11%	+77	SAFETY: Nighttime safety w/others	1,971	65%	28%	+37
OPERATORS: Helpfulness	1,989	79%	6%	+73	INFO: Service changes	1,920	57%	21%	+37
OPERATORS: Smooth start/stop	2,173	85%	12%	+73	C&C: Stop cleanliness	2,158	66%	30%	+36
SAFETY: Daytime safety w/ others	2,167	85%	12%	+73	TRANSFER: Wait time	1,061	66%	31%	+35
FARE PAYMENT: Ease of loading pass	362	82%	10%	+72	TRANSFER: Service connections	1,056	62%	29%	+33
P&R: Personal safety	882	84%	13%	+71	LOS: Travel time	2,179	66%	33%	+33
LOS: Distance to stop	2,175	84%	15%	+69	INFO: Website postings of delay	1,850	50%	19%	+31
FARE PAYMENT: Ease of adding value	913	82%	16%	+66	INFO: At stops	2,114	61%	30%	+31
OPERATORS: Handles problems	2,033	74%	10%	+63	INFO: Temporary service changes	1,933	55%	25%	+30
P&R: Vehicle safety	700	78%	17%	+61	C&C: Seating availability at stops	2,091	59%	31%	+28
INFO: Ability to obtain	2,111	75%	16%	+59	INFO: Email alerts of delays	1,444	43%	15%	+28
TRANSFER: Number of transfers	1,062	77%	18%	+59	SAFETY: Nighttime at stops	1,977	60%	34%	+25
C&C: Onboard cleanliness	2,180	79%	20%	+59	INFO: Text alerts of delays	1,405	40%	17%	+23
INFO: Smartphones and tablets	1,976	71%	14%	+57	P&R: Parking availability	700	60%	38%	+23
C&C: Seating availability on the bus	2,176	75%	23%	+53	INFO: Feedback ability	1,797	37%	21%	+16
INFO: Long term service changes	1,954	66%	15%	+51	C&C: Overcrowding on-board	2,134	54%	41%	+13
INFO: Online	1,999	63%	16%	+47	LOS: Nighttime frequency	587	42%	47%	-6

High net sat. (+80%=blue), Moderate net sat. (+50-79%=green), Low net sat. (+20-49=orange), Very Low net sat. (<20%=red)   *Small sample size

Individual Element Satisfaction – Top Tier

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The top-rated tier of Metro service elements is predominantly comprised of fare payment and operator-related elements. Riders give these aspects of Metro's service exceptionally high satisfaction ratings, with strong positive intensity (very satisfied) for most of these elements.

Element		Very Satisfied (5)	Somewhat Satisfied (4)	No Opinion (3)	Somewhat Dissatisfied (2)	Very Dissatisfied (1)	Total Sat.	Total Dissat.	Mean
FARE PAYMENT: U-Passes*	n=123	77%	21%				97%	3%	4.7
FARE PAYMENT: Ease of paying	n=2,154	75%	21%	3%			95%	4%	4.7
OPERATORS: Drives safely	n=2,183	64%	31%	3%			95%	4%	4.5
OPERATORS: Courtesy	n=2,179	64%	31%	2%	2%		95%	3%	4.6
FARE PAYMENT: ORCA cards	n=1,865	71%	24%	2%	2%		95%	3%	4.6
SAFETY: Daytime at stops	n=2,170	47%	43%	2%	6%	2%	90%	7%	4.3
FARE PAYMENT: Value of service	n=2,132	54%	34%	2%	8%	3%	87%	11%	4.3
OPERATORS: Smooth start/stop	n=2,173	46%	39%	2%	9%	3%	85%	12%	4.2
SAFETY: Daytime safety w/ others	n=2,167	40%	45%	3%	10%	2%	85%	12%	4.1
LOS: Distance to stop	n=2,175	58%	26%		10%	5%	84%	15%	4.2
P&R: Personal safety	n=882	36%	47%	3%	10%	3%	84%	13%	4.0
FARE PAYMENT: Ease of loading pass	n=362	59%	24%	8%	8%	2%	82%	10%	4.3
FARE PAYMENT: Ease of adding value	n=913	52%	30%	2%	11%	4%	82%	16%	4.1
OPERATORS: Helpfulness	n=1,989	50%	30%	14%	5%		79%	6%	4.2
C&C: Onboard cleanliness	n=2,180	29%	50%	1%	15%	5%	79%	20%	3.8

*Small sample size

Individual Element Satisfaction – Second Tier

The middle tier of satisfaction ratings includes a mix of level of service, comfort & cleanliness, information, and transfer-related items. Large majorities of riders generally rate these elements positively, albeit with diminished intensity in their ratings.

	Very Satisfied (5)	Somewhat Satisfied (4)	No Opinion (3)	Somewhat Dissatisfied (2)	Very Dissatisfied (1)	Total Sat.	Total Dissat.	Mean
P&R: Vehicle safety	n=700 33%	46%	5%	12%	5%	78%	17%	3.9
TRANSFER: Number of transfers	n=1,062 33%	44%	5%	14%	4%	77%	18%	3.9
C&C: Seating availability on the bus	n=2,176 28%	48%	2%	17%	6%	75%	23%	3.7
INFO: Ability to obtain	n=2,111 28%	48%	9%	12%	4%	75%	16%	3.8
OPERATORS: Handles problems	n=2,033 42%	32%	16%	8%	3%	74%	10%	4.0
LOS: Availability of service	n=2,176 29%	44%	2%	18%	7%	73%	26%	3.7
C&C: Ease of entering/exiting	n=2,141 24%	48%	3%	19%	6%	72%	25%	3.7
INFO: Smartphones and tablets	n=1,976 27%	44%	15%	10%	4%	71%	14%	3.8
LOS: Frequency of service	n=2,174 26%	44%	1%	21%	9%	69%	30%	3.6
LOS: On-time performance	n=2,171 21%	48%	2%	20%	9%	69%	29%	3.5
C&C: Shelter availability at stops	n=2,146 20%	47%	5%	20%	7%	68%	27%	3.5
C&C: Stop cleanliness	n=2,158 20%	46%	3%	22%	9%	66%	30%	3.5
LOS: Travel time	n=2,179 22%	44%	1%	23%	11%	66%	33%	3.4
TRANSFER: Wait time	n=1,061 16%	49%	3%	24%	8%	66%	31%	3.4
INFO: Long term service changes	n=1,954 23%	42%	20%	11%	4%	66%	15%	3.7

Individual Element Satisfaction – Third Tier

Most of the elements in the third tier also receive relatively positive ratings but some items – especially nighttime service frequency, the availability of parking at park & rides, overcrowding on board, and nighttime safety at stops – receive significantly higher levels of dissatisfied ratings than other elements tested.

	Very Satisfied (5)	Somewhat Satisfied (4)	No Opinion (3)	Somewhat Dissatisfied (2)	Very Dissatisfied (1)	Total Sat.	Total Dissat.	Mean
SAFETY: Nighttime safety w/others	n=1,971 22%	43%	7%	21%	7%	65%	28%	3.5
INFO:Online	n=1,999 23%	40%	21%	12%	4%	63%	16%	3.7
TRANSFER: Service connections	n=1,056 16%	46%	9%	23%	6%	62%	29%	3.4
INFO: At stops	n=2,114 18%	42%	9%	22%	7%	61%	30%	3.4
P&R: Parking availability	n=700 23%	37%	2%	17%	21%	60%	38%	3.3
SAFETY: Nighttime at stops	n=1,977 15%	45%	6%	24%	10%	60%	34%	3.3
C&C: Seating availability at stops	n=2,091 19%	41%	10%	23%	8%	59%	31%	3.4
INFO: Service changes	n=1,920 18%	39%	22%	15%	6%	57%	21%	3.5
INFO: Timeliness	n=1,839 20%	36%	26%	12%	6%	56%	19%	3.5
INFO: Temporary service changes	n=1,933 19%	36%	20%	17%	8%	55%	25%	3.4
C&C: Overcrowding on-board	n=2,134 12%	42%	5%	28%	13%	54%	41%	3.1
INFO: Website postings of delay	n=1,850 17%	33%	31%	13%	6%	50%	19%	3.4
INFO: Email alerts of delays	n=1,444 16%	27%	41%	10%	6%	43%	15%	3.4
LOS: Nighttime frequency	n=587 9%	33%	11%	33%	14%	42%	47%	2.9
INFO: Text alerts of delays	n=1,405 15%	25%	42%	11%	6%	40%	17%	3.3
INFO: Feedback ability	n=1,797 13%	24%	43%	13%	8%	37%	21%	3.2

Individual Element Satisfaction: 2018 & 2019 Comparisons

Individual Element Satisfaction – Top Tier

The highest-rated service elements in 2018 continued to be the highest-rated in 2019, with negligible variation at the overall satisfaction level. Positive intensity (very satisfied ratings) varied slightly for some items, including slight increases for operator courtesy and safe driving.

Statistically significant shifts represented by a ▲ or ▼ icon.

Legend: ■ Satisfied ■ No Opinion ■ Dissatisfied

Element	Satisfied	No Opinion	Dissatisfied	Very Sat.	Very Dissat.	Mean
FARE: U-Passes* ('19)	97%		3%	77%	1%	4.7
('18)	98%		2%	81%	0%	4.8
FARE: Ease of paying ('19)	95%	1%	4%	75%	1%	4.7
('18)	95%	1%	4%	74%	0%	4.6
OPERATORS: Drives safely ('19)	95%	1%	4%	64% ▲	1%	4.5
('18)	95%	1%	4%	60%	1%	4.5
OPERATORS: Courtesy ('19)	95%	2%	3%	64% ▲	1%	4.6
('18)	94%	3%	4%	59%	1%	4.5
FARE: ORCA cards ('19)	95%	2%	3%	71%	1%	4.6
('18)	95%	1%	3%	73%	1%	4.6
SAFETY: Daytime at stops ('19)	90%	2%	7%	47%	2%	4.3
('18)	90%	1%	9%	46%	2%	4.3
FARE: Value of service ('19)	87%	2%	11%	54% ▲	3%	4.3
('18)	87%	2%	11%	51%	2%	4.2
SAFETY: Daytime safety w/ others ('19)	85%	3%	12%	40%	2%	4.1
('18)	87%	2%	11%	40%	2%	4.3

*Small sample size

Individual Element Satisfaction – Second Tier

Between 2018 and 2019, there have been negligible, if any shifts in satisfaction for most service elements. Ratings for the distance to the nearest stop, ease of adding value, the helpfulness of operators, and number of transfers are slightly lower than in 2018 but still rated very highly.

Statistically significant shifts represented by a ▲ or ▼ icon.

■ Satisfied   ■ No Opinion   ■ Dissatisfied

	Satisfied	No Opinion	Dissatisfied	Very Sat.	Very Dissat.	Mean
OPERATORS: Smooth start/stop ('19)	85%	2%	12%	46%	3%	4.2
('18)	86%	2%	12%	44%	2%	4.2
LOS: Distance to stop ('19)	84% ▼	1%	15% ▲	58%	5%	4.2
('18)	86%	1%	12%	57%	4%	4.3
P&R: Personal Safety ('19)	84%	3%	13%	36%	3%	4.0
('18)	85%	3%	12%	40%	2%	3.9
FARE: Ease of adding value ('19)	82% ▼	2%	16%	52%	4%	4.1
('18)	85%	1%	14%	51%	4%	4.2
OPERATORS: Helpfulness ('19)	79% ▼	14%	6%	50%	1%	4.2
('18)	83%	12%	5%	48%	1%	4.3
C&C: Onboard cleanliness ('19)	79%	1%	20%	29%	5%	3.8
('18)	81%	1%	18%	30%	3%	3.9
TRANSFER: Number of transfers ('19)	77% ▼	5%	18%	33%	5%	3.9
('18)	80%	4%	16%	33%	5%	3.9
P&R: Vehicle Safety ('19)	78%	5%	17%	33%	5%	3.9
('18)	78%	5%	17%	28%	5%	3.7
C&C: Stop cleanliness ('19)	66%	3%	30%	20%	9%	3.5
('18)	66%	3%	31%	19%	8%	3.5

Individual Element Satisfaction – Third Tier

The next set of elements are largely rated identically in 2019 as they were in 2018. The satisfaction ratings for how operators handle problems and frequency of service are a couple of points lower, though the satisfaction intensity (very satisfied rating) for service frequency has improved.

Statistically significant shifts represented by a ▲ or ▼ icon.

■ Satisfied　■ No Opinion　■ Dissatisfied

	Satisfied	No Opinion	Dissatisfied	Very Sat.	Very Dissat.	Mean
OPERATORS: Handles problems ('19)	74% ▼	16%	10%	42%	3%	4.0
('18)	77%	13%	10%	40%	2%	4.1
C&C: Seating availability on the bus ('19)	75%	2%	23%	28%	6%	3.7
('18)	75%	2%	24%	28%	6%	3.7
INFO: Ability to obtain ('19)	75%	9%	16%	28%	4%	3.8
('18)	75%	9%	17%	30%	2%	3.9
LOS: Availability of service ('19)	73%	2%	26%	29%	7%	3.7
('18)	73%	1%	26%	27%	6%	3.7
C&C: Ease of entering/exiting ('19)	72%	3%	25%	24% ▼	6%	3.7
('18)	73%	2%	25%	27%	6%	3.7
INFO: Smartphones or tablets ('19)	71%	15%	14%	27%	4%	3.8
('18)	73%	12%	15%	29%	4%	3.8
LOS: Frequency of service ('19)	69% ▼	1%	30% ▲	26% ▲	9%	3.6
('18)	72%	1%	27%	22%	8%	3.6
LOS: On-time performance ('19)	69%	2%	29%	21%	9%	3.5
('18)	69%	1%	30%	22%	10%	3.5
C&C: Shelter avalability at stops ('19)	68%	5%	27%	20%	7%	3.5
('18)	67%	4%	29%	20%	7%	3.5

Individual Element Satisfaction – Fourth Tier

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There are few differences between the year-over-year ratings for the elements featured on this slide. Travel time satisfaction, the availability of information online, and transfer connections are slightly lower in 2019, with no significant shifts in rating intensity.

Statistically significant shifts represented by a ▲ or ▼ icon.

■ Satisfied   ■ No Opinion   ■ Dissatisfied

	Satisfied	No Opinion	Dissatisfied	Very Sat.	Very Dissat.	Mean
LOS: Travel time ('19)	66% ▼	1%	33% ▲	22%	11%	3.4
('18)	68%	1%	31%	22%	10%	3.5
TRANSFER: Wait time ('19)	66%	3%	31%	16%	8%	3.4
('18)	67%	3%	31%	16%	6%	3.5
INFO: Long term service changes ('19)	66%	20%	15%	23%	4%	3.7
('18)	66%	20%	14%	22%	3%	3.7
SAFETY: Nighttime safety w/ others ('19)	65%	7%	28%	22%	7%	3.5
('18)	67%	6%	28%	23%	6%	3.6
INFO: Online ('19)	63% ▼	21%	16%	23%	4%	3.7
('18)	66%	20%	14%	24%	3%	3.7
TRANSFER: Service connections ('19)	62% ▼	9%	29%	16%	6%	3.5
('18)	65%	7%	29%	16%	5%	3.5
INFO: At stops ('19)	61%	9%	30%	18%	7%	3.4
('18)	62%	8%	30%	19%	9%	3.4
P&R: Parking availability ('19)	60%	2%	38%	23%	21%	3.3
('18)	59%	2%	38%	26%	19%	3.4
SAFETY: Nighttime at stops ('19)	60%	6%	34%	15%	10%	3.3
('18)	60%	5%	34%	17%	11%	3.3

Individual Element Satisfaction – Lowest Tier

Among the last tier of items, the satisfaction ratings for the timeliness of info, email alerts and text alerts of delays are all slightly higher in 2019 than in 2019. Again, very few ratings are significantly different between the two years.

Statistically significant shifts represented by a ▲ or ▼ icon.

■ Satisfied   ■ No Opinion   ■ Dissatisfied

	Satisfied	No Opinion	Dissatisfied	Very Sat.	Very Dissat.	Mean
C&C: Seating availability at stops ('19)	59%	10%	31%	19%	8%	3.4
('18)	61%	8%	31%	20%	8%	3.4
INFO: Service changes ('19)	57%	22%	21%	18%	6%	3.5
('18)	58%	22%	20%	18%	5%	3.5
INFO: Timeliness ('19)	56% ▲	26%	19%	20%	6%	3.5
('18)	52%	28%	20%	18%	6%	3.4
INFO: Temporary service changes ('19)	55%	20%	25%	19%	8%	3.4
('18)	56%	21%	24%	16%	6%	3.4
C&C: Overcrowding on-board ('19)	54% ▼	5%	41%	12%	13%	3.1
('18)	56%	3%	41%	13%	14%	3.2
INFO: Website postings of delays ('19)	50%	31%	19%	17%	6%	3.4
('18)	51%	30%	19%	18%	5%	3.5
INFO: Email alerts of delays ('19)	43% ▲	41%	15%	16%	6%	3.4
('18)	40%	43%	17%	17%	5%	3.3
INFO: Text alerts of delays ('19)	40% ▲	42%	17%	15%	6%	3.3
('18)	37%	44%	19%	15%	7%	3.3
INFO: Feedback ability ('19)	37%	43%	21%	13%	8%	3.2
('18)	39%	40%	22%	14%	6%	3.2

Household Rider Share & Rider Behavior

Household Rider Share – Riders by Subarea (Yearly)

The share of countywide, respondent households with someone who has ridden Metro in the last 30 days is unchanged from 2018 but the rider share has steadily grown in Seattle/North King and East King over the last decade. Despite some fluctuations in its reported share of riders over that period, South King rider share is comparable to 2010 levels.

% of Households with Metro Riders – Countywide and Subarea Comparison

Legend:
- Overall Countywide
- Seattle/North King
- South King
- East King

Seattle/North King: 58%, 55%, 64%, 61%, 62%, 65%, 68%, 69%
Overall Countywide: 38%, 35%, 40%, 45%, 44%, 39%, 44%, 44%
East King: 28%, 26%, 28%, 34%, 35%, 27%, 34%, 36%
South King: 23%, 23%, 23%, 35%, 31%, 20%, 28%, 25%

Years: 2010, 2011, 2012, 2013, 2014, 2015, 2018, 2019
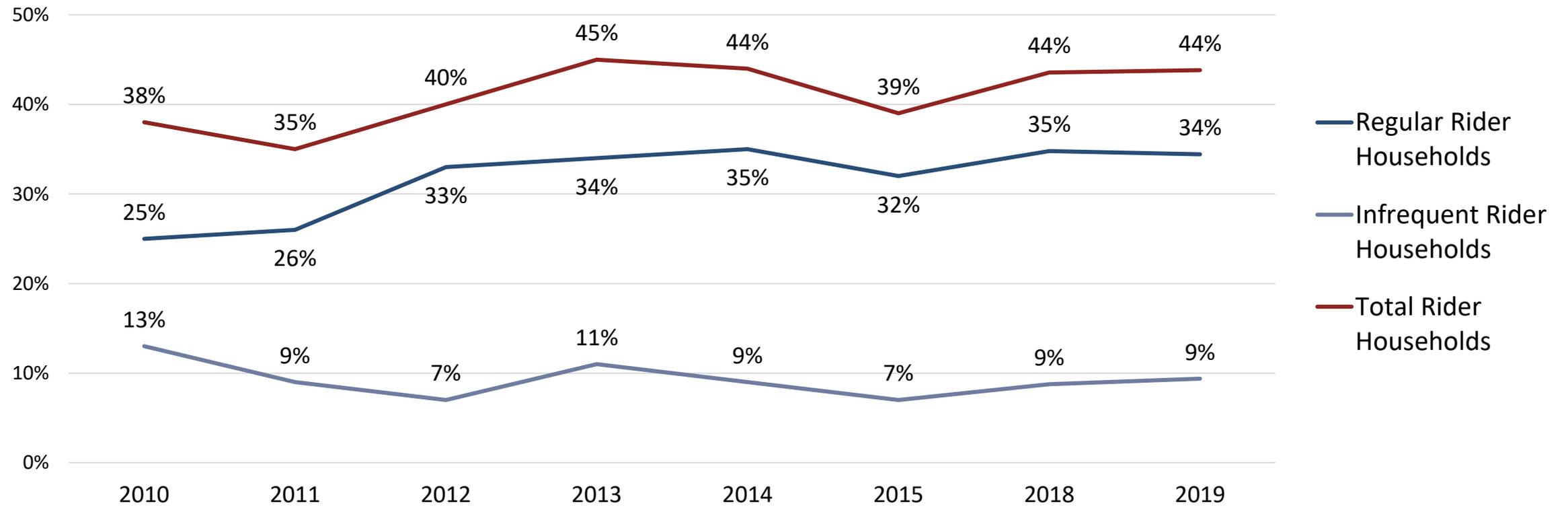
Just over a third of respondents report personally taking Metro at least once in the last 30 days. This share is far higher in the Seattle/North King subarea than the rest of the county. South King has the lowest reported share of Metro riders of the three-county subareas.

% Share of Metro Riders and Non-Riders – Sub-area Comparison
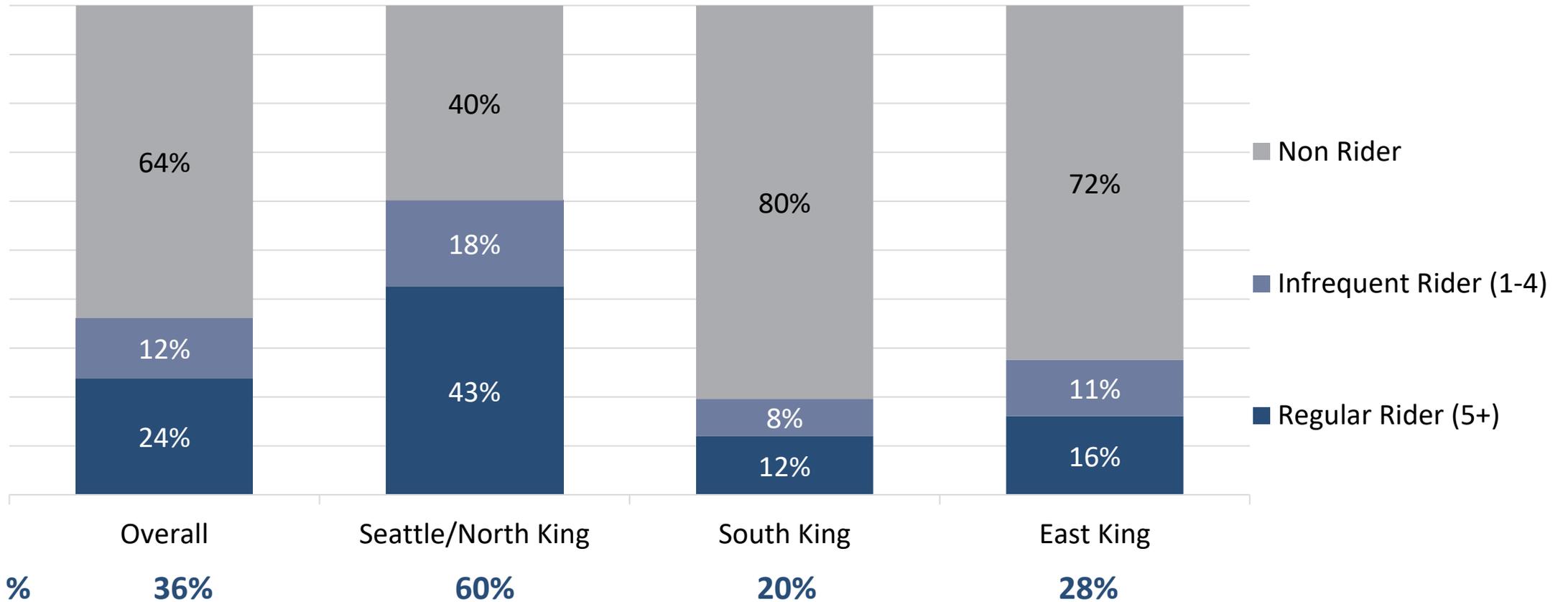
	Overall	Seattle/North King	South King	East King
Non Rider	64%	40%	80%	72%
Infrequent Rider (1-4)	12%	18%	8%	11%
Regular Rider (5+)	24%	43%	12%	16%
Total Rider %	**36%**	**60%**	**20%**	**28%**

S5A. Thinking about the last 30 days, how many <u>one-way rides</u> have <u>you</u> taken on a <u>Metro bus</u>? A round trip counts as two one-way rides.
For example, if you commuted to and from work five days a week on a Metro bus, that would be two trips per work day, which would be about 40 rides for the last 30 days.
A one-way trip where you had to transfer counts as one ride.

Metro Ridership – by Age Category

> *Over a third of working-age respondents report riding Metro, including a quarter who have taken it at least five times in the last month. Just a quarter of 65+ respondents report riding Metro in the last month, with half of those being infrequent riders (<5 rides).*

% Share of Metro Riders and Non-Riders – Age Comparison
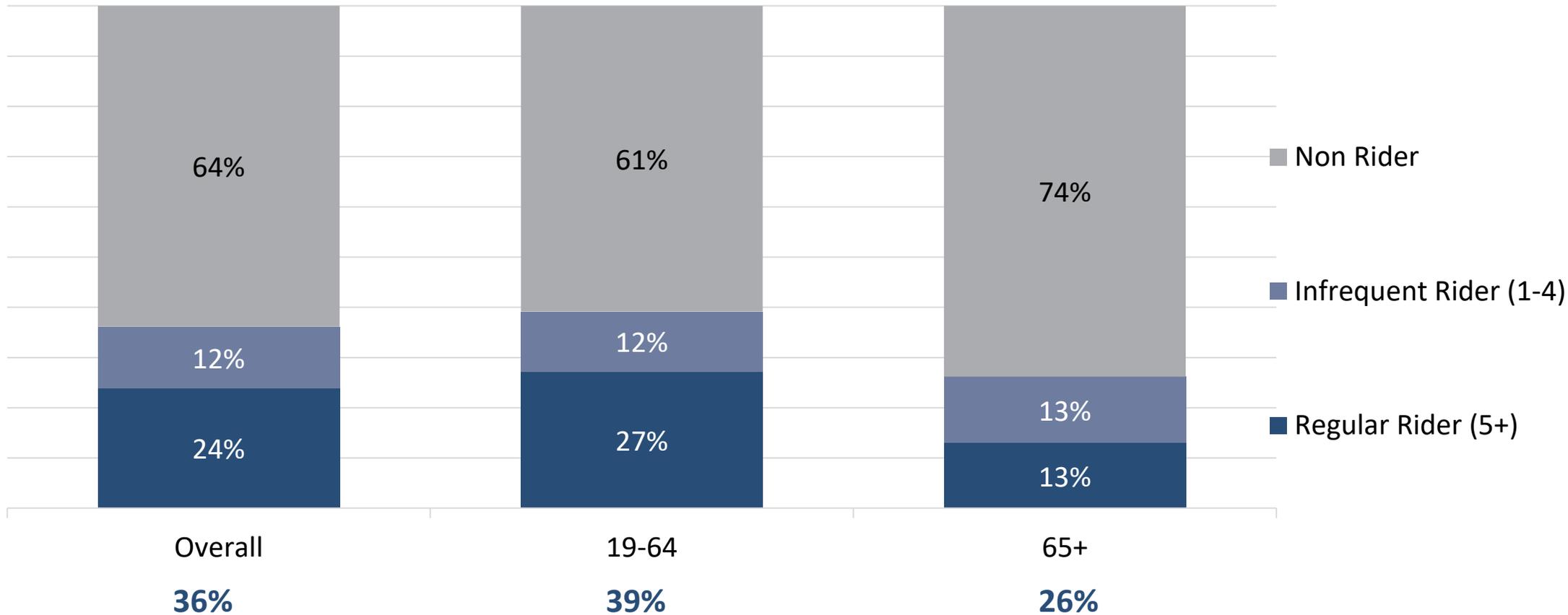
	Overall	19-64	65+
Non Rider	64%	61%	74%
Infrequent Rider (1-4)	12%	12%	13%
Regular Rider (5+)	24%	27%	13%
Total Rider %	**36%**	**39%**	**26%**

S5A. Thinking about the last 30 days, how many <u>one-way rides</u> have <u>you</u> taken on a <u>Metro bus</u>? A round trip counts as two one-way rides.
For example, if you commuted to and from work five days a week on a Metro bus, that would be two trips per work day, which would be about 40 rides for the last 30 days.
A one-way trip where you had to transfer counts as one ride.

Ridership Frequency – by Subgroup

The frequency of ridership is higher among Seattle/North, people of color, and riders with household incomes under $35K/year.

Average Number of Metro Rides in the Last 30 Days – Rider Subgroup Comparison
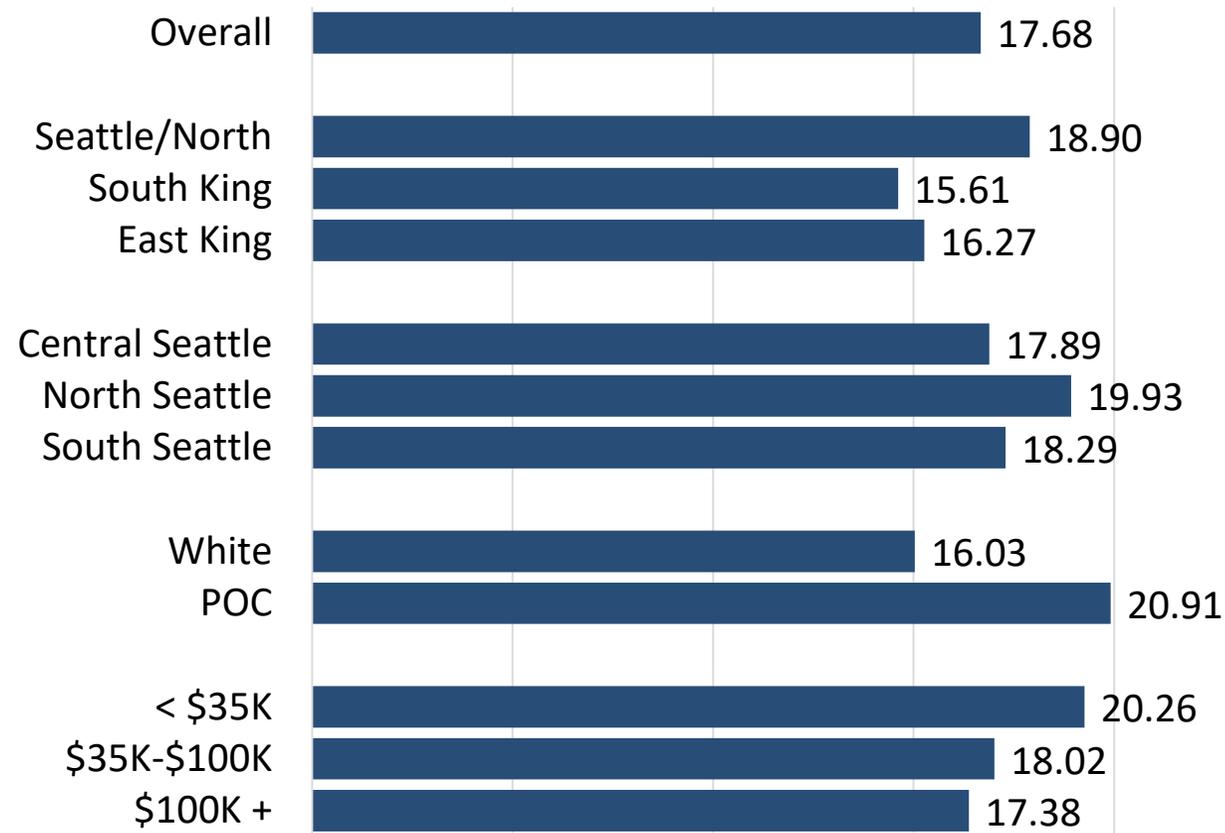
Subgroup	Average
Overall	17.68
Seattle/North	18.90
South King	15.61
East King	16.27
Central Seattle	17.89
North Seattle	19.93
South Seattle	18.29
White	16.03
POC	20.91
< $35K	20.26
$35K-$100K	18.02
$100K +	17.38

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

Primary Purpose of Metro Bus Trips

Just over half of riders primarily use Metro buses to commute to and from work, followed by just under 1-in-5 for recreation or social-related trips and 1-in-10 for errands and shopping.

Primary Purpose of the Trip (Ranked)

Purpose	Percentage
To/from work	53%
Fun/Recreation/Social	16%
Shopping/Errands	8%
To/from school	5%
Medical appointments	5%
To/from volunteering	3%
Business appointments	2%
Special events	2%
Get to airport	2%
Other appointments	1%
Other	2%
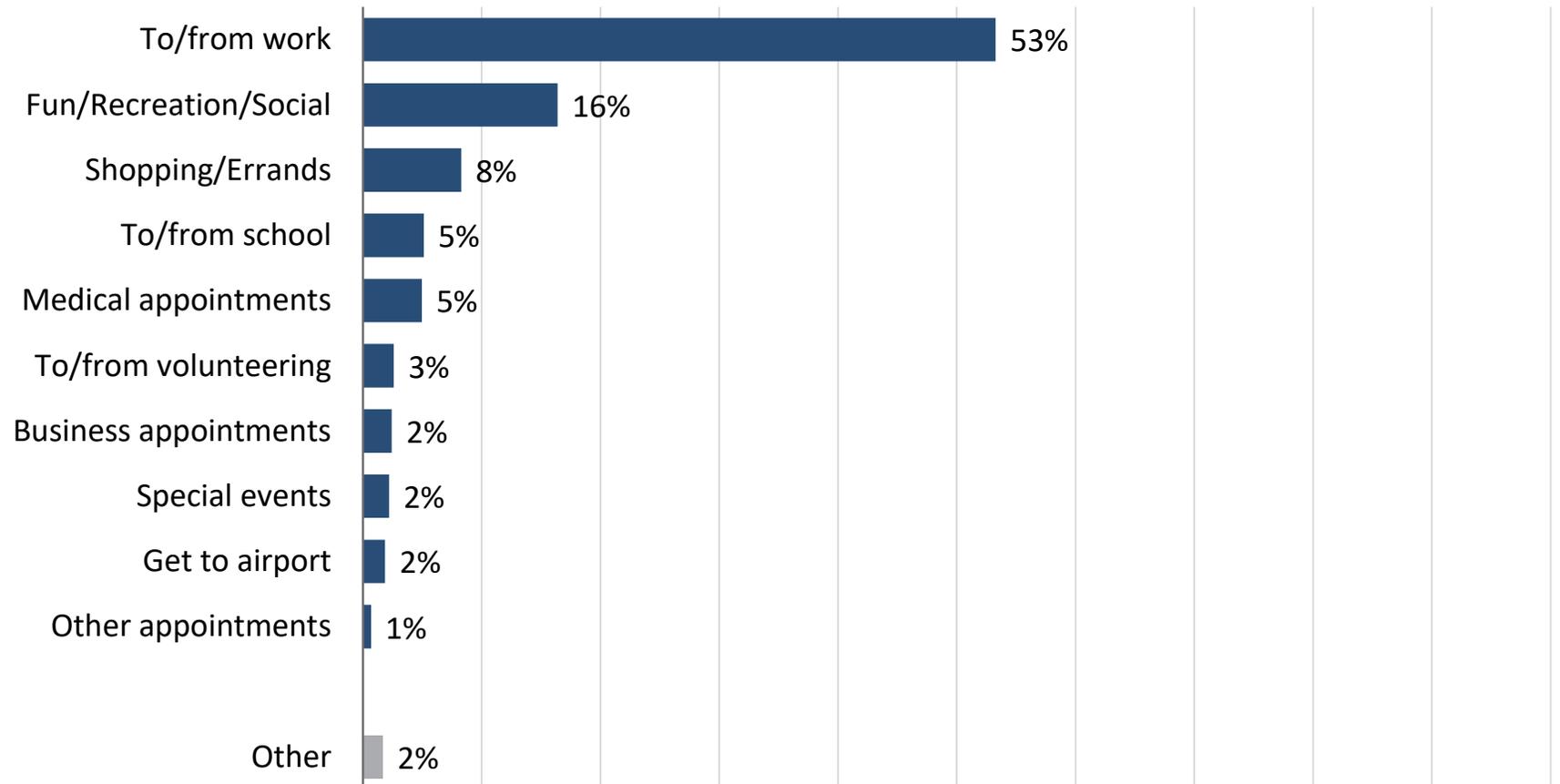
M5A. When you ride a Metro bus, what is the <u>primary</u> purpose of the trip or trips you take <u>most often</u>? Select all that apply.
M5C. You indicated that you use Metro bus for multiple purposes. Please rank the purposes in order of most used to least used.

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A majority of riders from lower-income households rely on Metro for most or all of their travel needs around the county. At least 2-in-5 riders with a disability, from primarily non-English speaking households, people of color, and younger riders also rely on Metro for most of their travel. Riders who are East King residents, age 55+, white, and above 200% of the Federal Poverty Level are the least reliant on Metro buses.

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

Subgroup	%
Overall	30%
< $35K	56%
At/Below 200% Federal Poverty	55%
Disability	48%
Primarily Other Language in HH	45%
Non-white	41%
16-34	40%
North Seattle	35%
Central Seattle	34%
Seattle/North	33%
Male	31%
South King	30%
35-54	29%
Female	29%
No disability	28%
Primarily English in HH	28%
South Seattle	27%
$35K-$100K	26%
Above 200% Federal Poverty	25%
White	25%
$100K +	23%
55+	22%
East King	21%
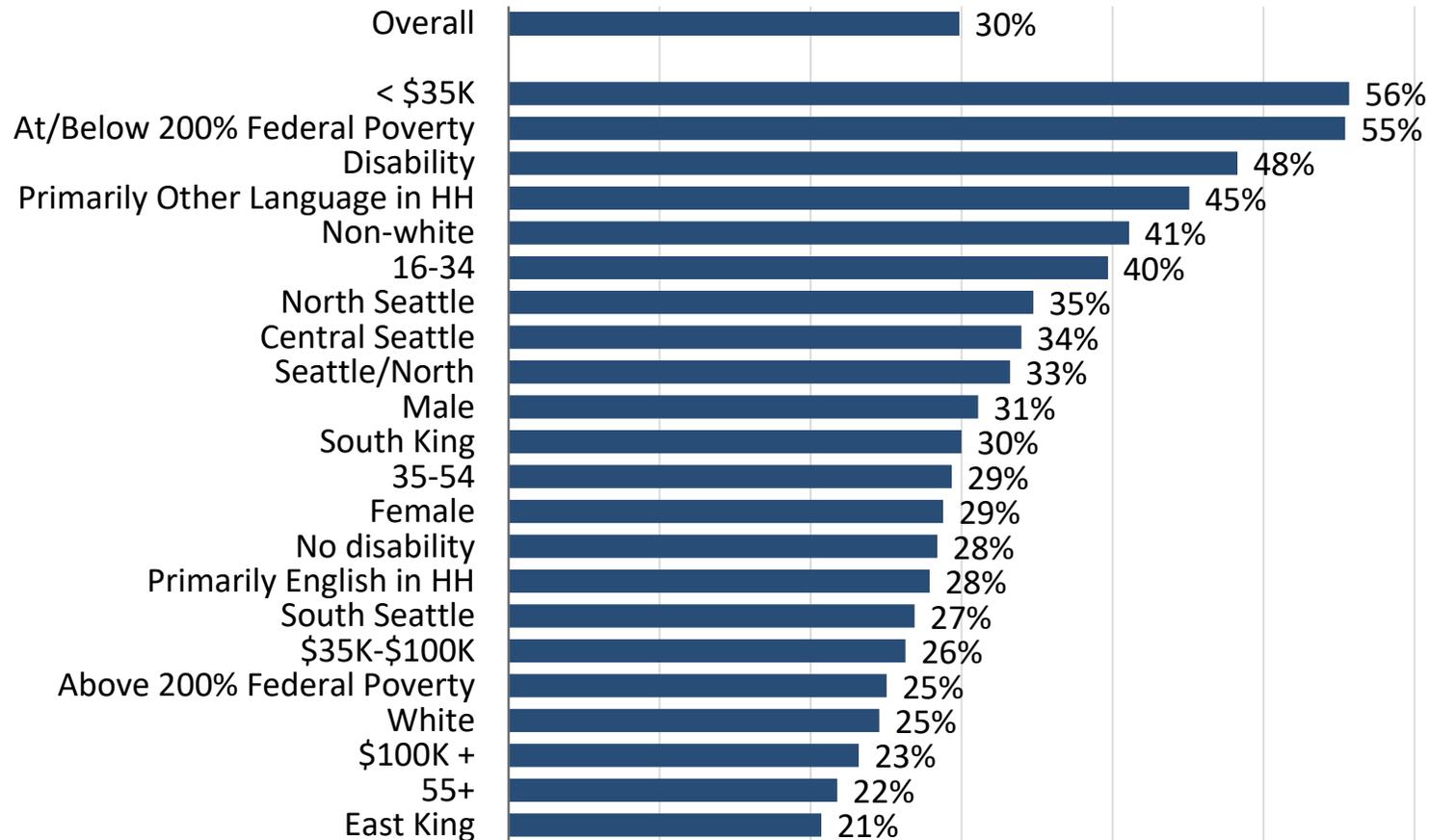
M4. Now, thinking about <u>all</u> your travel around King County, to what extent do you use a Metro <u>bus</u> to get around? Do you use a Metro <u>bus</u> for…

Rider Park & Ride Usage

About two-in-five riders reported using a Park & Ride in the last year. Two-thirds of users typically drive there.

Metro Park and Ride Usage Frequency Among Riders

- Yes, frequently — 12%
- Yes, sometimes — 13%
- Yes, rarely — 14%
- No, never — 61%

39% (Yes, frequently + Yes, sometimes + Yes, rarely)
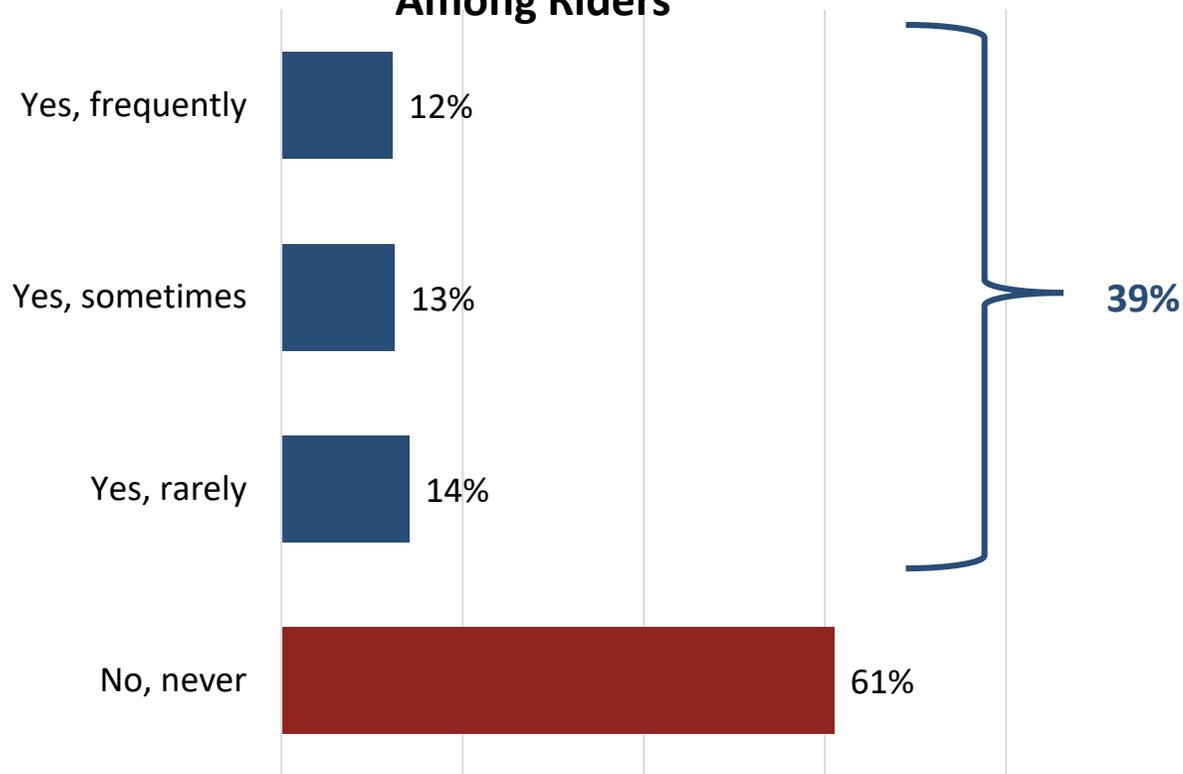
Transportation from Home to Park and Ride (n=895)

- Drive yourself — 68%
- Ride with someone else/Carpool — 8%
- Bus — 8%
- Walk — 7%
- Get dropped off — 7%
- Bicycle — 1%
- Other/Ref — 1%

PR1. In the past year, have you used a Metro Park & Ride lot?
PR2D. How do you <u>usually</u> get from home to the Park & Ride lot you use most often?
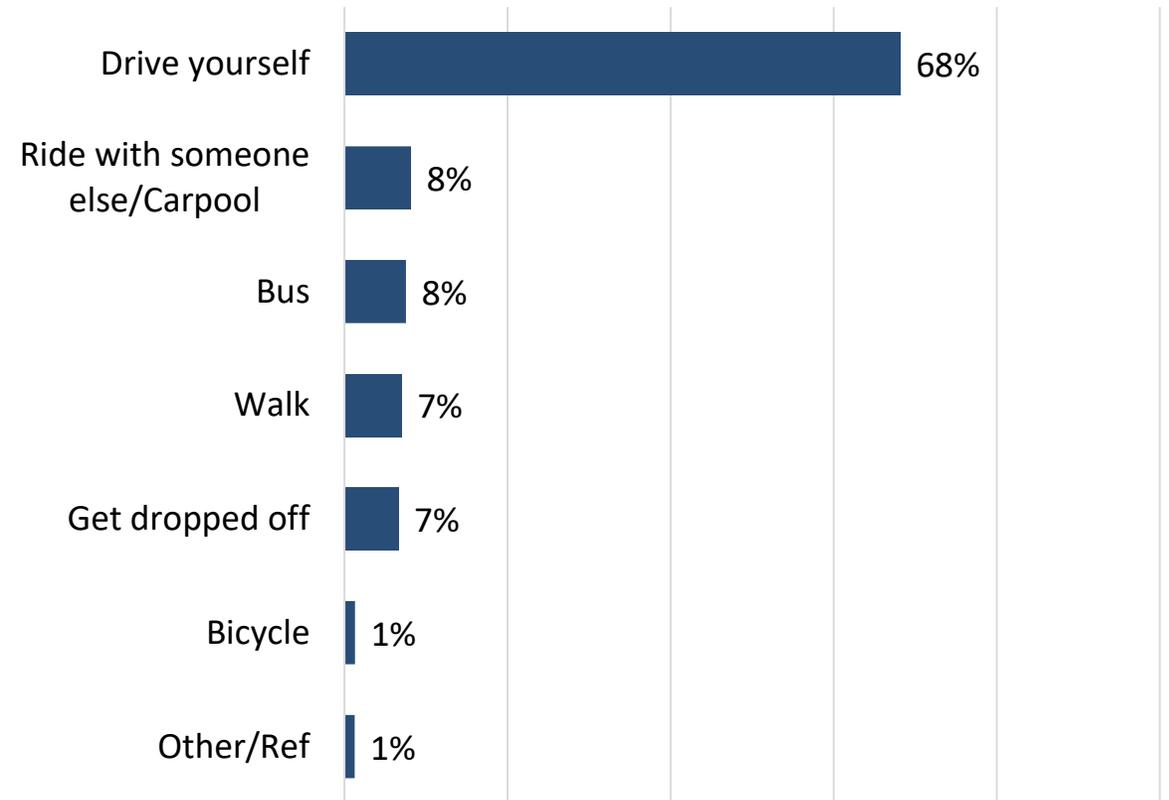
Fare Payment

Fare Payment Method

About four-in-five riders typically use ORCA to pay their fares on Metro, compared to just one-in-ten who use cash. For those using ORCA, a majority report using full-fare adult cards and a fifth use employer-provided passes.

Usual Method of Fare Payment (Multi-Response) – Overall Riders

Method	Percentage
ORCA Card	83%
Cash	13%
Regional Reduced Fare Permit	5%
King County Employee ID/Badge	1%
Paper tickets	1%
TransitGo	1%
Other	1%

ORCA type:
Full fare ORCA card: 57%
Employer-provided ORCA: 22%
U-Pass: 7%
ORCA LIFT card: 4%

F0. How do you usually pay your bus fare? (Multiple Response)
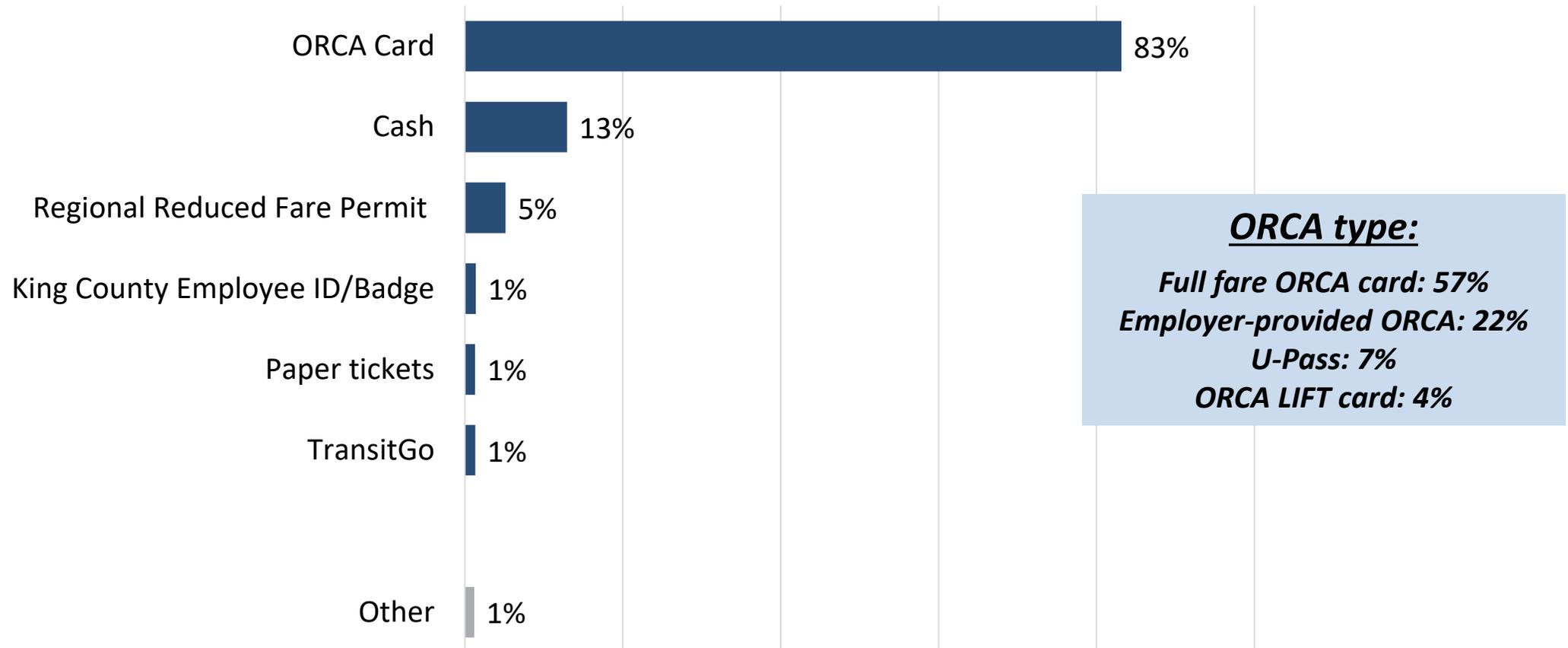
Fare Payment Trend

As the share of ORCA usage has increased over the last several years, the share of cash usage has fallen steadily. That trend continues in 2019.

Fare Payment Method Over Time – Overall Riders

ORCA: 66% (2013), 68% (2014), 69% (2015), 79% (2016), 81% (2018), 83% (2019)

Cash / Tickets: 32% (2013), 30% (2014), 27% (2015), 21% (2016), 13% (2018), 11% (2019)

Years: 2013, 2014, 2015, 2016, 2018, 2019

F0. How do you usually pay your bus fare? (Multiple Response)
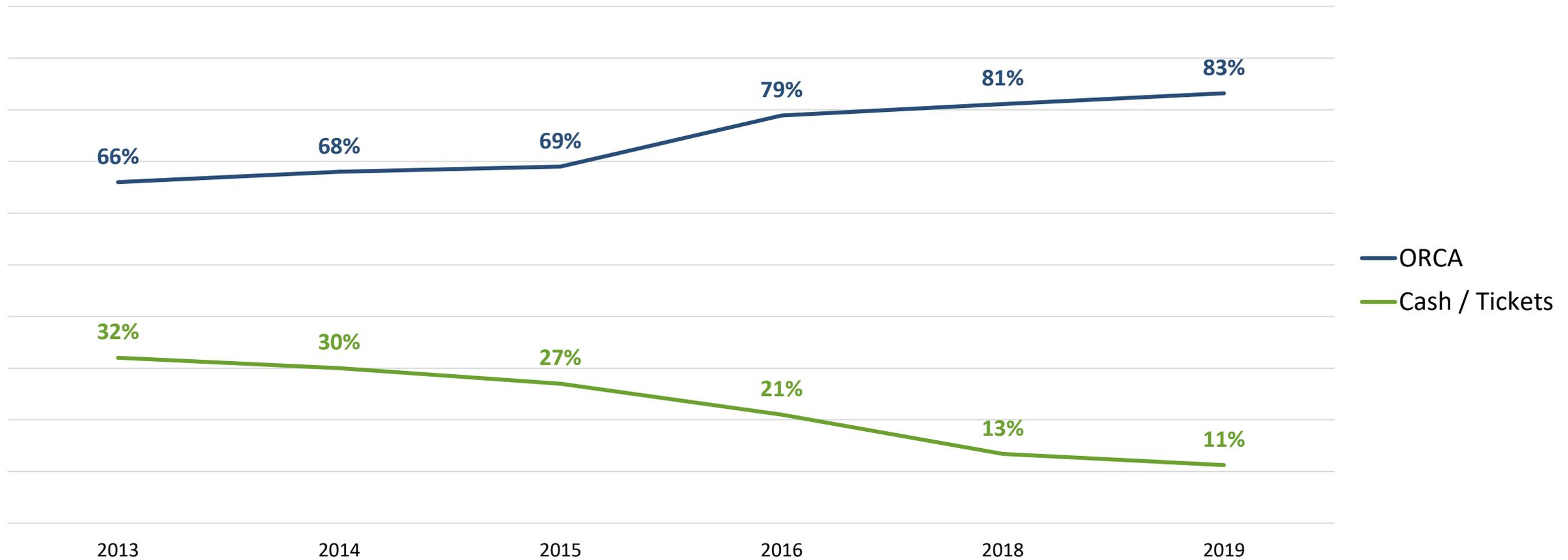
Reasons for Preferring Cash/Tickets

For those using cash to pay their Metro fare, half do so because they don't ride often enough to justify an ORCA card. Other common reasons include the perception that cash is easier, lack of locations to load passes or e-purse values, and that they just haven't gotten around to it/lack of time.

Why do you prefer cash/tickets? (Multiple-Response) (n=238)

Reason	%
Don't ride often enough	50%
Easier to pay with (cash/tickets)	17%
Not enough locations where I can go to put a pass or/ add value	12%
Haven't gotten around to it/No time/Lost card	10%
Dont have a debit or credit card	5%
Don't know about it/Haven't looked into it	5%
Concerns about losing ORCA card	4%
Can't afford the $5 fee to purchase an ORCA card	3%
Don't want to/Unwilling to pay the $5 fee to purchase an ORCA card	3%
Receive tickets from social service agency/school/work	2%
Concerns about security/Identity theft using an ORCA card	2%
Other	10%
Don't know	1%

F4A. You indicated that you use cash and tickets to pay your fare. Why do you prefer to use cash/tickets/cash and tickets instead of an ORCA Card?

Two-thirds of riders report being in the full-fare adult category, with the remaining third split between Senior (65+) RRFP, school-issued cards, ORCA LIFT, and Disability RRFP.

Customer Fare Category – Overall Riders

Category	Percentage
Full fare adult (19 and up)	67%
Senior (65 and up) - Regional Reduced Fare Permit	14%
UPASS/UW ID Card	7%
ORCA LIFT (low-income adult)	5%
Disabled - Regional Reduced Fare Permit	3%
Youth (up to age 18)	1%
Other	3%
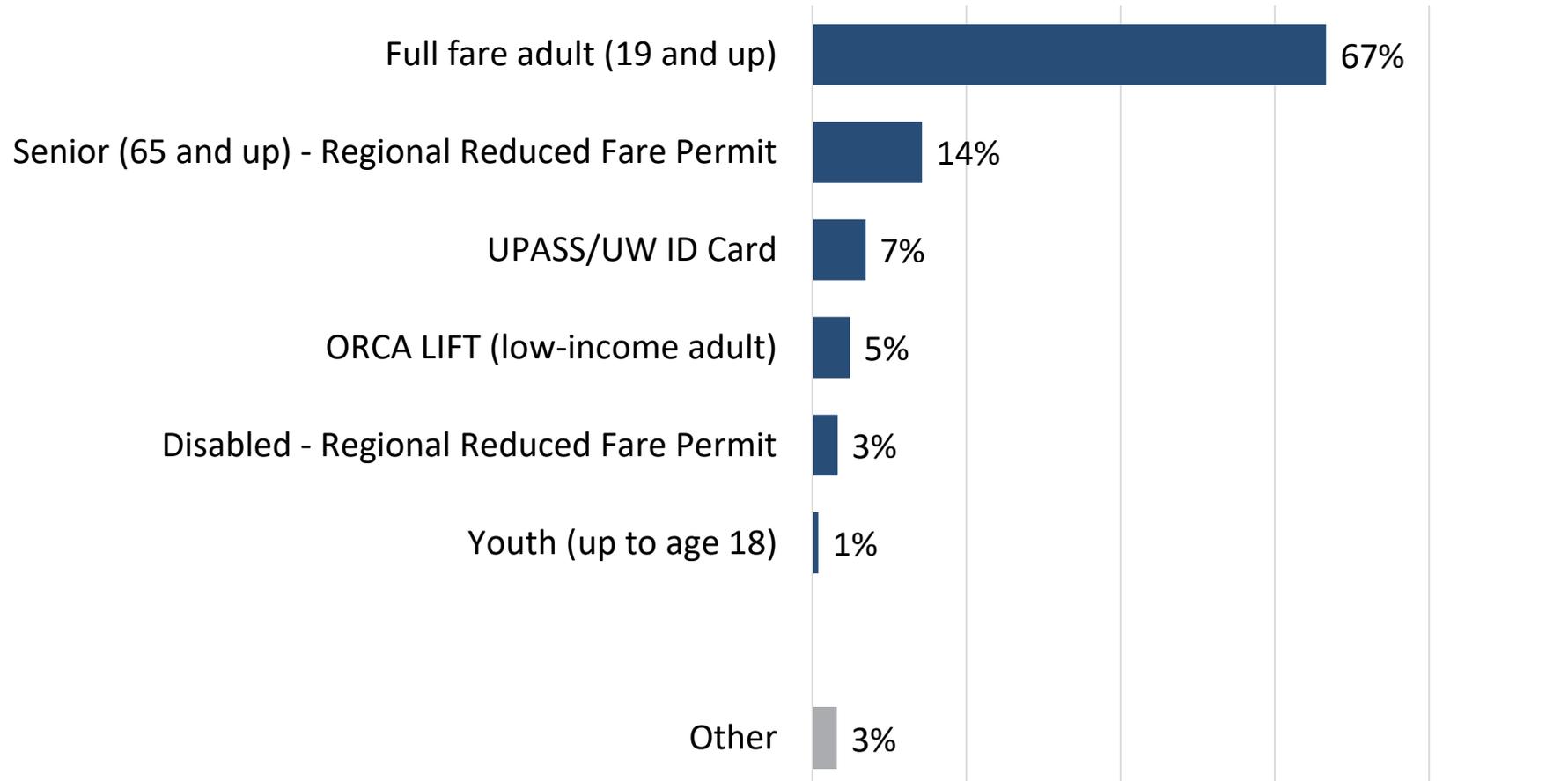
Non-Rider Perceptions, Barriers, & Incentives

Other Public Transportation Services – Non-Riders

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A fifth of non-riders report using some form of public transit other than Metro, which primarily includes Link Light Rail, followed by ferry and Sound Transit Express buses.

Do you use any of the other public transportation services in the area other than King County Metro?

Yes
19%

No/DK
81%

Which do you use? (n=930)

Service	Percent
Link light rail	64%
Washington State Ferries	33%
Sound Transit bus	18%
Sounder train	10%
Monorail	7%
King County Water Taxi	4%
South Lake Union streetcar	3%
Community Transit	3%
Pierce Transit	1%
First Hill streetcar	2%
Kitsap Transit	0%
Other	9%
Don't know	2%
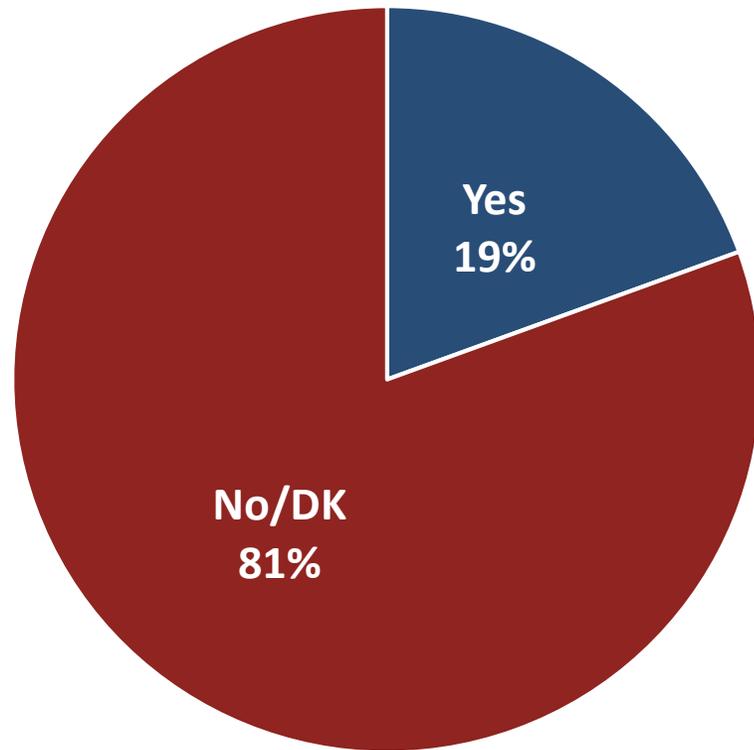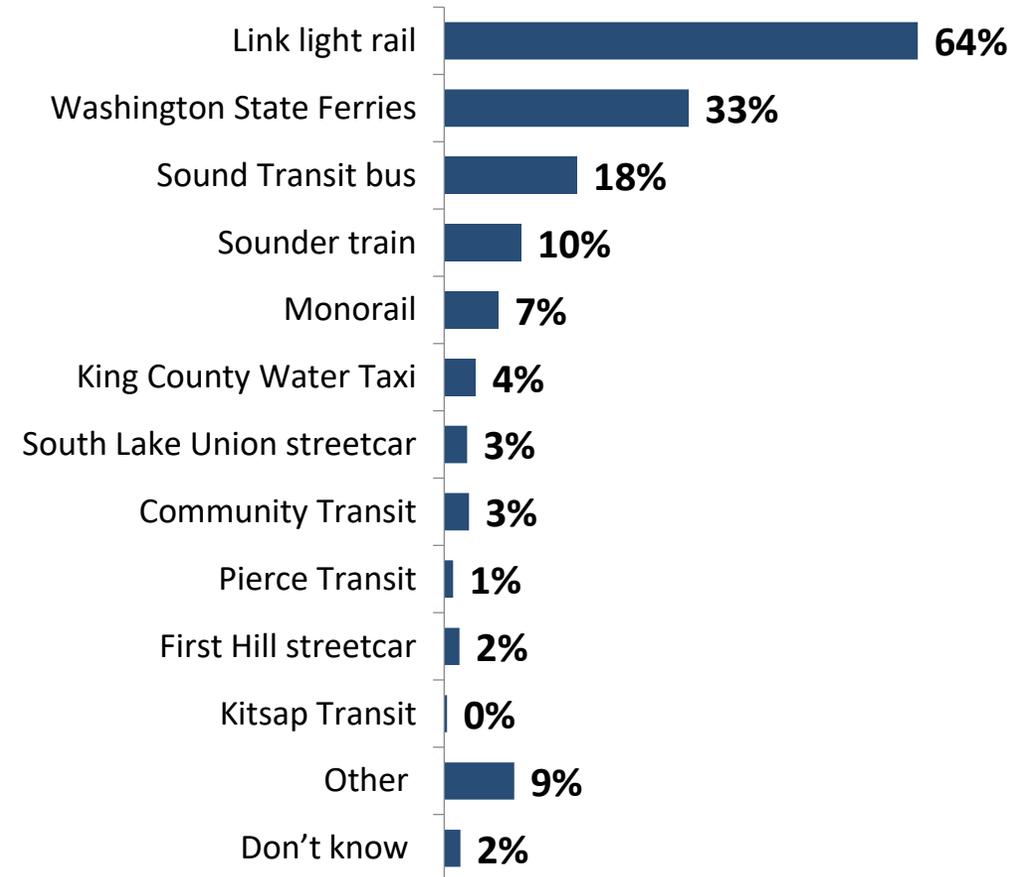
NON1A. Do you use any of the other public transportation services in the area *other* than King County Metro?
NON1B. Which do you use?

Metro Bus Trips – Non-Riders

About a third of non-riders recall riding Metro within the last year. They reported riding for a variety of reasons, led by fun/social, work, and special events.

When was the last time you rode a Metro bus?

Category	Percent
Within the last 3 months	12%
Between 3 and 6 months	8%
6 months to 1 year ago	14%
Between 1 and 5 years ago	25%
More than 5 years ago	25%
Never	15%
Don't know	1%

58%

Primary Purpose of the Trip (n=2,678)

Category	Percent
Fun/Recreation/Social	27%
To/from work	20%
Special events	18%
Shopping/Errands	6%
Jury duty	5%
Social Services	4%
Medical appointments	4%
Go to the airport	3%
Other appointments	3%
Business appointments	3%
To/from school	2%
To/from volunteering	1%
No single primary purpose	1%
Other	2%

NON2. When was the last time you rode a Metro bus?
NON2A. When you rode Metro, what was the primary purpose of the trip you took most often?

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Metro Favorability – Non-Riders

Nearly three-in-five non-riders have a favorable opinion of Metro, compared to a quarter who view the agency unfavorably. The intensity (strongly %) of these ratings is relatively low, both positively and negatively. Just under a fifth have no opinion or are unsure how to rate Metro. Satisfaction is highest among those in Seattle/North with no significant difference in opinion by age, ethnicity, or income.

Among Non-Riders (n=4,697)

Favorable 58%
- Somewhat 44%
- Strongly 15%

Unfavorable 26%
- Somewhat 17%
- Strongly 8%

Does not apply/ No Opinion 16%
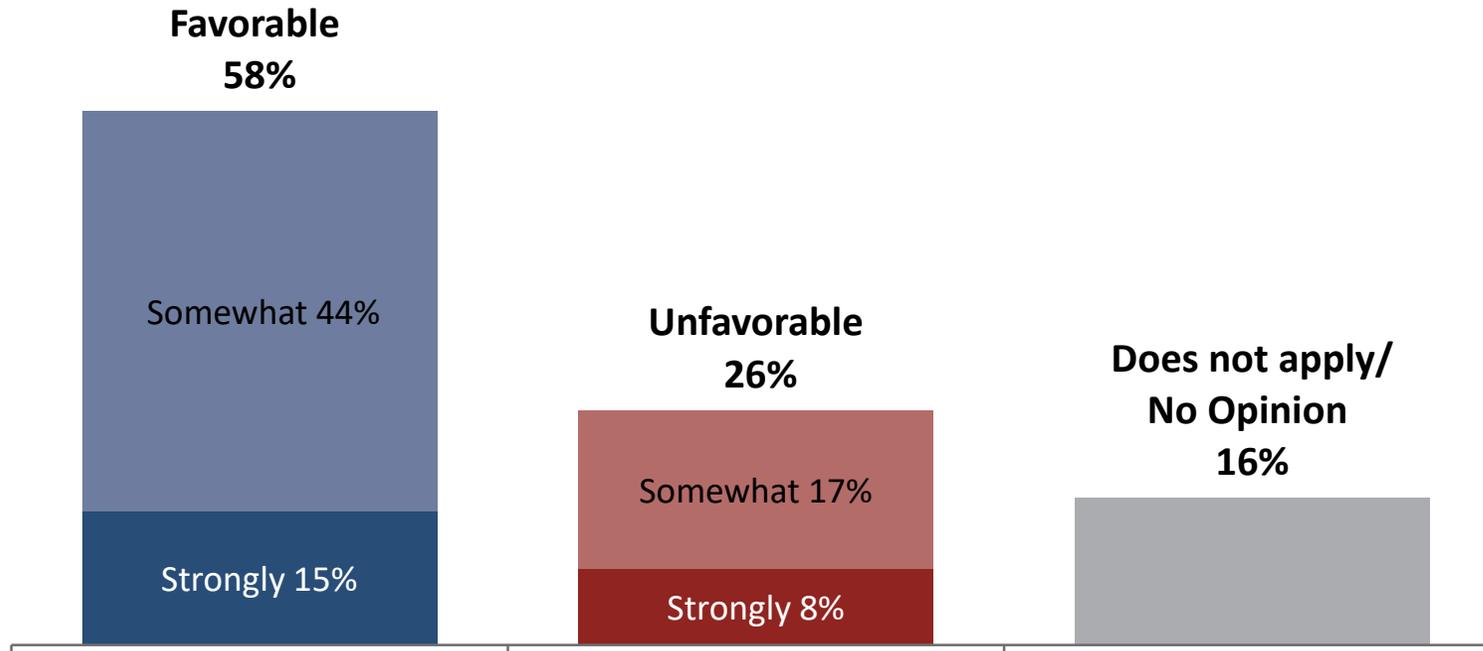
	Fav.	Unfav.	Net Fav.
Overall (100%; 4,697)	58%	26%	+33
Seattle/North King (22%; 912n)	67%	24%	+43
South King (46%; 2,252n)	52%	29%	+23
East King (32%; 1,533n)	61%	22%	+39
White (68%; 3,378n)	61%	24%	+36
Non-white (23%; 918n)	59%	23%	+36
16-34 (15%; 481n)	60%	23%	+37
35-54 (38%; 1,724n)	56%	28%	+28
55+ (46%; 2,451n)	60%	24%	+37
<$35K/year (10%; 269n)	58%	23%	+35
$35K-$100K/year (39%; 1,683n)	62%	23%	+39
>$100K/year (34%; 1,931n)	62%	25%	+36

E1. Do you have a favorable or unfavorable opinion of King County Metro overall?

Metro Favorability – Non-Riders Tracked

Compared to 2018, overall Metro favorability among non-riders is a few points lower but the unfavorable rating remains largely the same. The share of those who had no opinion and could not rate Metro is a couple of points higher.

2018
Non-Riders (n=2,218)

Favorable 61%

Somewhat 45%

Strongly 16%

Unfavorable 25%

Somewhat 17%

Strongly 7%

Does not apply/ No Opinion 14%

2019
Non-Riders (n=4,697)

Favorable 58% (-3)

Somewhat 44%

Strongly 15%

Unfavorable 26% (+1)

Somewhat 17%

Strongly 8%

Does not apply/ No Opinion 16% (+2)

E1. Do you have a favorable or unfavorable opinion of King County Metro overall?
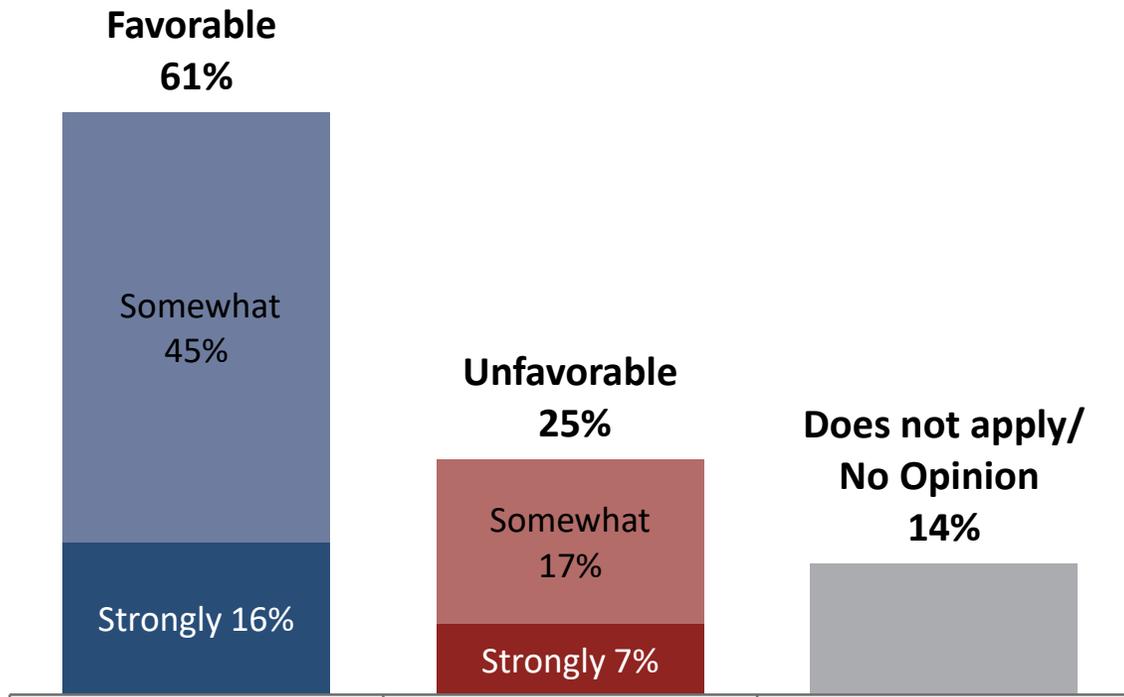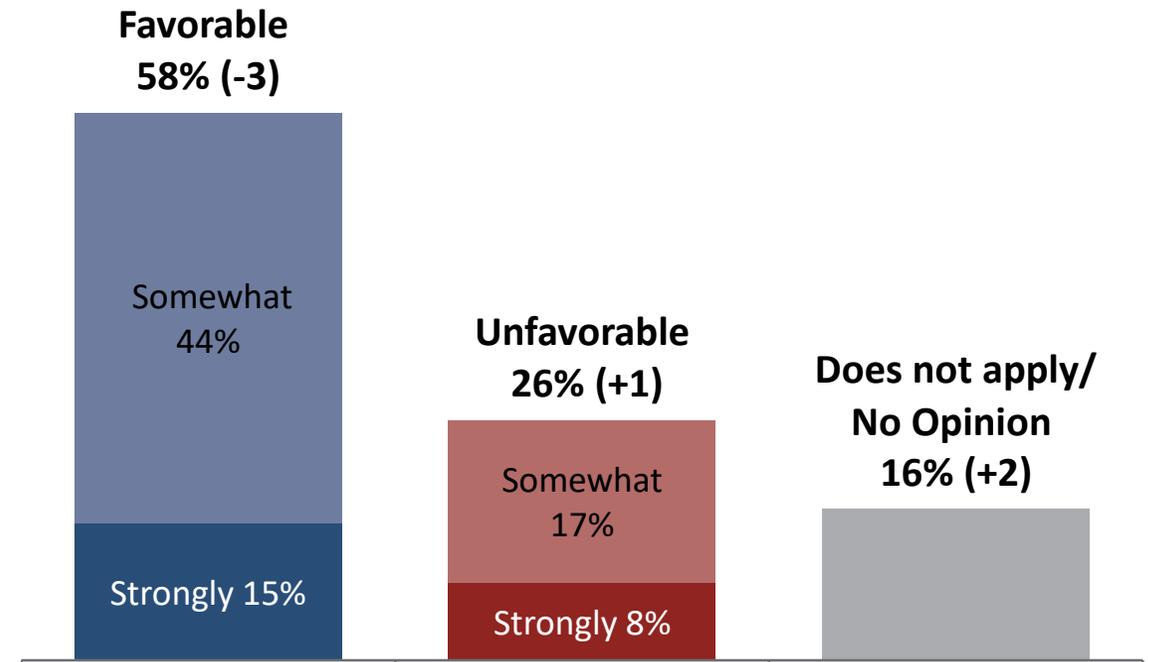
Metro Brand Perceptions

A majority of non-riders consider Metro an agency they trust and just under half say they generally hear positive things in the media or from friends or colleagues.

Among Non-Riders (n=4,697)

Legend
■ Strongly Agree
■ Somewhat Agree
■ Does not apply to me/ No Opinion
■ Somewhat Disagree
■ Strongly Disagree

Statement	Strongly Agree	Somewhat Agree	Does not apply to me/ No Opinion	Somewhat Disagree	Strongly Disagree	Total Agree	Total Disag.	Net Agree
Metro is an agency I trust	17%	42%	20%	12%	9%	60%	20%	+39
When I read or hear things about Metro in the media or online, I generally hear positive things (Think of things like the newspaper, television, and radio, and Internet sites like blogs, Twitter, and Facebook)	10%	39%	20%	20%	11%	49%	31%	+18
When I hear my friends and colleagues talking about Metro, I generally hear positive things	10%	35%	23%	20%	11%	45%	31%	+14

GW5. Based on anything you have seen, heard, or directly experienced, do you agree or disagree with each of the following statements?

Ridership Interest

Two-in-five non-riders at least somewhat agree they could see themselves using Metro if it were available for either their commute or personal trips. Intensity is highest for potential commute trips, where a fifth say they would be strongly likely to consider riding Metro for their commute at least once or twice per week.

Among Non-Riders (n=4,697)

Legend: ■ Strongly Agree ■ Somewhat Agree ■ Does not apply to me/ No Opinion ■ Somewhat Disagree ■ Strongly Disagree

Statement	Strongly Agree	Somewhat Agree	Does not apply to me/No Opinion	Somewhat Disagree	Strongly Disagree	Total Agree	Total Disag.	Net Agree
If it were available for my <u>commute</u>, I could see myself riding a Metro bus at least one or two days a week	19%	23%	32%	9%	16%	**42%**	**25%**	**+17**
If it were available for my <u>personal trips</u>, I could see myself riding a Metro bus at least one or two days a week	11%	27%	15%	18%	29%	**38%**	**47%**	**-9**
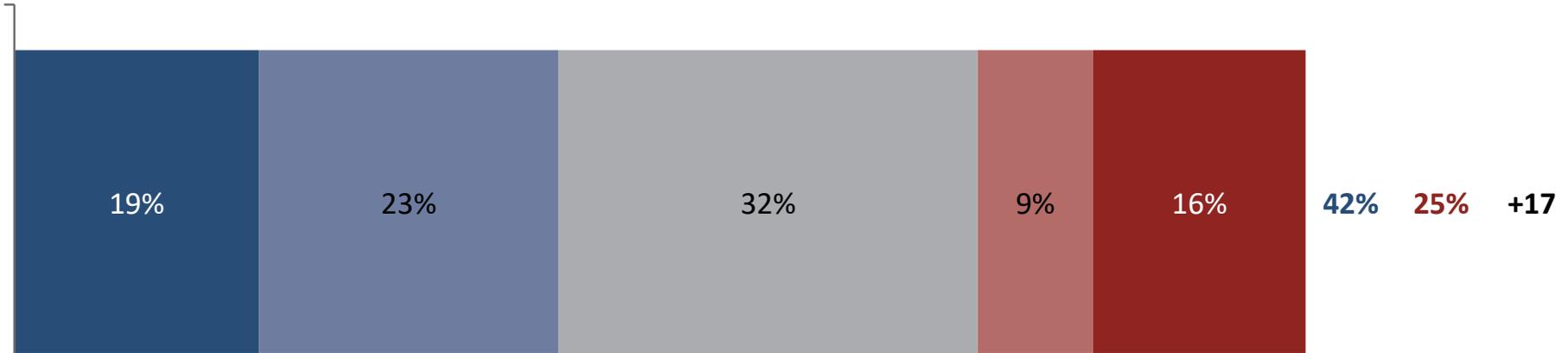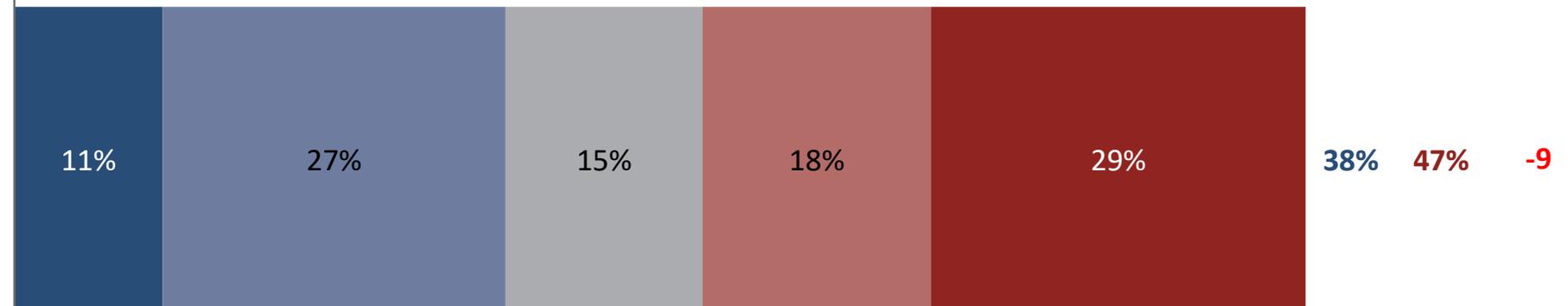
Transit Barriers – First Tier

For those who do not use Metro, the most salient barriers to riding include the perceptions that the bus too long (46% strongly agree) and the lack of schedule flexibility (42%). Most of the top-tier of barriers are issues which may require additional funding resources to address, with the exceptions of a couple of information-based barriers including the hassle of planning bus trips beforehand and uncertainty surrounding how to reach travel destinations by bus.

Among Non-Riders (n=4,697)

Legend: ■ Strongly Agree ■ Somewhat Agree ■ Does not apply to me/ No Opinion ■ Somewhat Disagree ■ Strongly Disagree

Statement	Strongly Agree	Somewhat Agree	Does not apply to me/ No Opinion	Somewhat Disagree	Strongly Disagree	Total Agree	Total Disag.	Net Agree
Traveling by bus takes too long	46%	33%	10%	8%	3%	79%	11%	+68
Traveling by bus does not offer enough flexibility for my schedule	42%	29%	16%	8%	4%	71%	12%	+59
It's a hassle to have to plan bus trips ahead of time	28%	39%	12%	13%	7%	67%	21%	+46
It is important to me to minimize the impact of my travel on the environment	23%	40%	16%	12%	9%	63%	21%	+43
Traveling by bus is less expensive than driving	26%	33%	18%	16%	8%	59%	24%	+35
The bus system doesn't go where I need it to go	26%	31%	19%	15%	9%	57%	24%	+33
I have concerns for my personal safety on the bus	18%	31%	13%	21%	18%	49%	39%	+10
The bus system doesn't run when I need it to run	19%	26%	28%	16%	10%	46%	26%	+20
I don't really know how to reach my travel destination using the bus	15%	24%	16%	19%	25%	40%	45%	-5

E2INT. Please indicate if you agree or disagree with each of the following statements.

Transit Barriers – Second Tier

Apart from the exceptions mentioned on the previous side, the rest of the information-based barriers – including concerns about ending up on the wrong route, at the wrong location, understanding the fare payment system, and uncertainty where to catch the bus – are not significant issues for most non-riders.

Among Non-Riders (n=4,697)

	Strongly Agree	Somewhat Agree	Does not apply to me/ No Opinion	Somewhat Disagree	Strongly Disagree	Total Agree	Total Disag.	Net Agree
The bus is too crowded	11%	27%	33%	21%	8%	38%	29%	+9
There is no bus stop close to my home that I can use	18%	15%	13%	16%	38%	33%	54%	-21
I worry I might end up on the wrong route when riding the bus	10%	23%	16%	20%	31%	33%	51%	-18
I worry I might end up in the wrong place when riding the bus	9%	23%	15%	20%	33%	31%	53%	-22
I worry I will not be able to find a seat on the bus	8%	23%	23%	24%	22%	31%	46%	-16
The bus service does not consistently arrive on time	9%	21%	44%	18%	9%	30%	27%	+3
The fare payment system is difficult to understand	6%	19%	28%	21%	26%	24%	47%	-23
I am not sure where to catch the bus	6%	18%	16%	20%	40%	24%	60%	-36
The bus is too expensive	5%	15%	26%	26%	28%	20%	55%	-35

E2INT. Please indicate if you agree or disagree with each of the following statements.

Potential Amenities & Service Changes

King County METRO — We'll Get You There

When considering potential bus service changes and amenities, about a quarter or more say they would be much more likely to ride Metro more often if there was faster bus service available for their trip (36% much more likely), more routes serving where they need to go (31%), real-time schedule info online (27%) and at stops (26%), more routes within a quarter mile of their home and destination (26%), and increased frequency (24%).

Among Non-Riders (n=4,697)

■ Much more likely   ■ Somewhat more likely   **Total More Likely**

Amenity / Service Change	Much more likely	Somewhat more likely	Total More Likely
Faster bus service between my home and my typical travel destination	36%	30%	66%
More bus routes serving the places where I need to go	31%	33%	64%
Real-time schedule information available online	27%	35%	62%
Real-time schedule information available at stops and transit centers	26%	35%	61%
More frequent bus service	24%	35%	59%
More bus routes serving a quarter mile from home and my typical destination	26%	31%	57%
Cleaner bus stops and transit centers	19%	31%	50%
More security personnel on the bus and at stops	20%	28%	49%
Cleaner buses	18%	30%	48%
Less crowded buses	13%	32%	45%
Ability to pay fares before boarding the bus	16%	28%	44%
More comfortable buses	13%	27%	40%
Cheaper bus fares	15%	23%	38%
Bus service that runs later in the day	13%	23%	36%
Bus service that starts earlier in the day	9%	15%	24%
More bike storage at transit hubs	5%	9%	14%

E4INT. Below is a list of potential service changes and amenities that Metro could offer for its bus service. For each of the following, please indicate whether that potential service change or amenity would make you more likely or not to ride Metro more often.

Potential Rider Segmentations

Potential Rider Segmentation

About a third (31%) of residents in the survey are non-riders, have not recently used other local public transit services, and are at least somewhat interested in riding Metro if it were available for either their commute trips or personal trips.

Potential Rider Commuters: *Non-riders who currently commute and would be interested in riding Metro at least once per week for either commute or personal trips*

Potential Rider Non-Commuters: *Non-riders who do not commute but would be interested in riding Metro at least once per week for either commute or personal trips*

Potential Rider Targets (30%)

Metro Riders 36%	Non-Metro Riders, Uses Other Transit 6%	Potential Rider Commuters 17%	Potential Rider Non-Commuters 14%	Non-Riders, Not Interested 28%
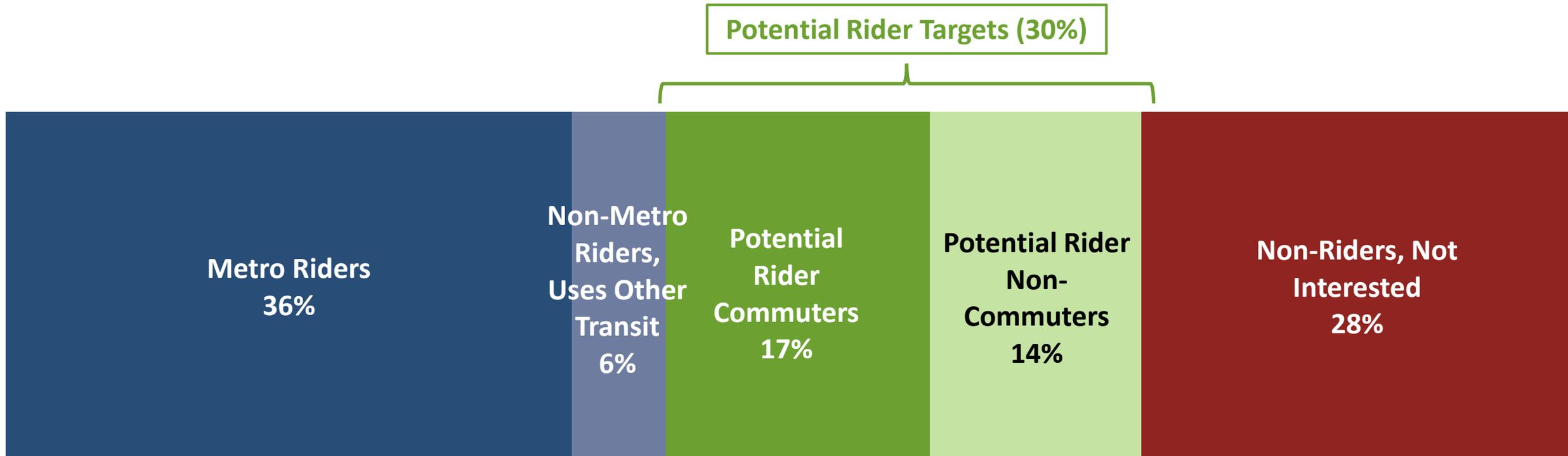
Potential Rider Demographic Profiles

The potential rider shares are highest among non-riders who live in East King County (39% potential riders), households who speaks a language other than English as the primary language (38%), Live in South King County (34%), and homeowners (33%).

Potential Rider Demos (n=2,147)

Category	Percent
East King	39%
Other language	38%
South King	34%
Own/Buying	33%
Non-White	32%
Vehicle for personal use	32%
$35K-$75K	32%
F 16-44	32%
Female	31%
$150K +	31%
$75K-<$150K	31%
Above 200% Federal Poverty	31%
F 45+	31%
55+	31%
35-54	31%
M 45+	30%
Male	30%
English	30%
White	29%
16-34	29%
M 16-44	28%
At/Below 200% Federal Poverty	27%
Rent/Lease	25%
< $35K	24%
Seattle/North King	20%
No vehicle for personal use	13%
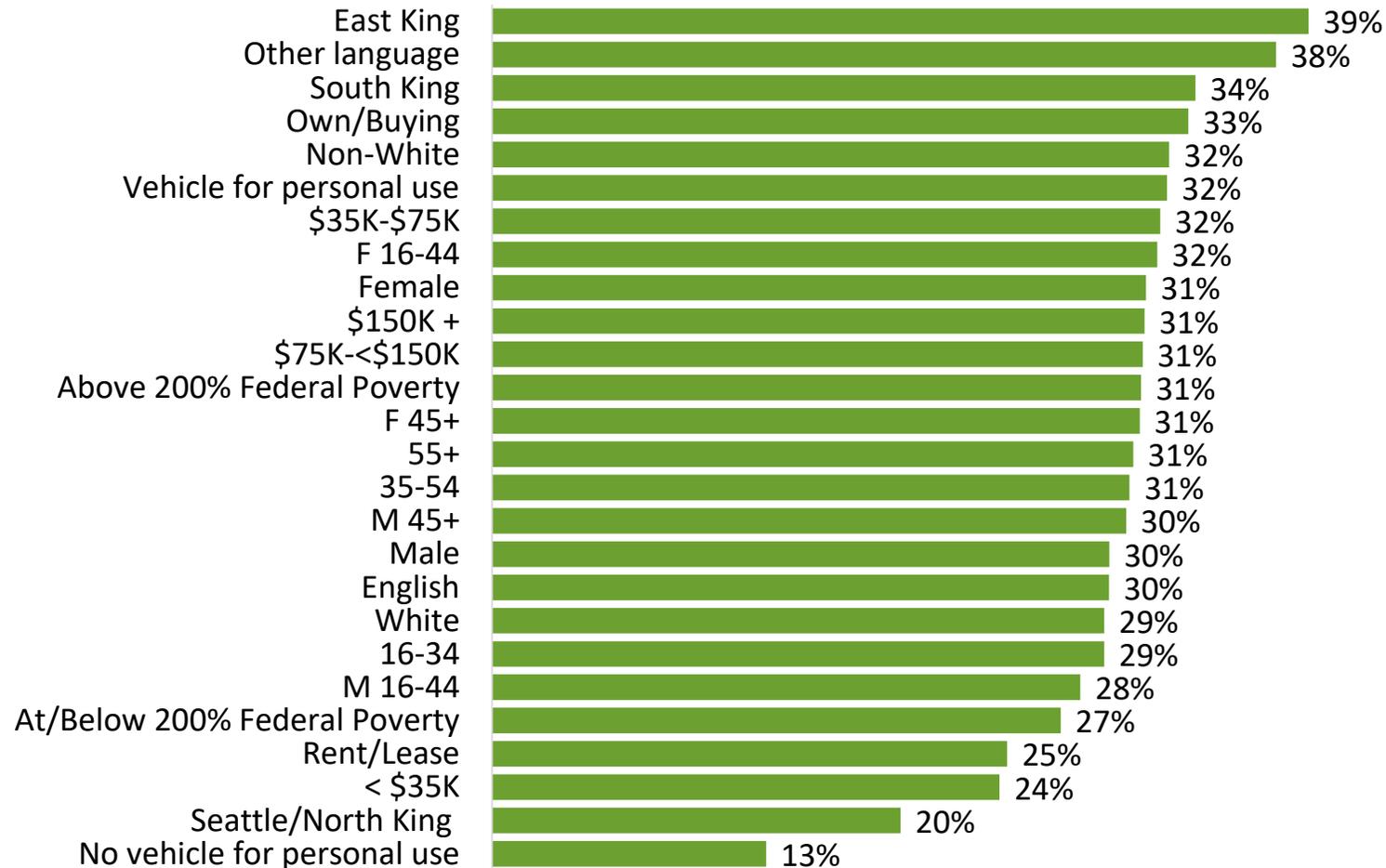
Transit Barriers – 1st Tier – Commuter PRs

For potential riders who are commuters, the perceived travel time (49% strongly agree) and inadequate flexibility (46%) are their most prohibitive barriers to riding transit.

Among Potential Rider Commuters (n=1,182)

Legend: ■ Strongly Agree ■ Somewhat Agree ■ Does not apply to me/ No Opinion ■ Somewhat Disagree ■ Strongly Disagree

Statement	Strongly Agree	Somewhat Agree	Does not apply to me/ No Opinion	Somewhat Disagree	Strongly Disagree	Total Agree	Total Disag.	Net Agree
Traveling by bus takes too long	49%	38%	3%	7%	2%	88%	9%	+78
Traveling by bus does not offer enough flexibility for my schedule	46%	35%	7%	8%	4%	81%	12%	+69
It is important to me to minimize the impact of my travel on the environment	29%	47%	8%	12%	4%	76%	16%	+60
It's a hassle to have to plan bus trips ahead of time	24%	45%	6%	18%	8%	68%	26%	+42
Traveling by bus is less expensive than driving	30%	36%	9%	16%	8%	67%	24%	+43
The bus system doesn't go where I need it to go	31%	36%	7%	17%	9%	67%	26%	+41
The bus system doesn't run when I need it to run	24%	34%	15%	17%	9%	58%	27%	+31
There is no bus stop close to my regular travel destination that I can use	26%	23%	7%	20%	24%	49%	44%	+5
I have concerns for my personal safety at bus stops	14%	33%	7%	23%	22%	47%	46%	+1
The bus is too crowded	9%	34%	23%	26%	8%	43%	34%	+9
I have concerns for my personal safety on the bus	12%	31%	7%	26%	23%	43%	50%	-7

Transit Barriers – 2nd Tier – Commuter PRs

Among Potential Rider Commuters (n=1,182)

Legend: ■ Strongly Agree ■ Somewhat Agree ▨ Does not apply to me/ No Opinion ■ Somewhat Disagree ■ Strongly Disagree

Statement	Strongly Agree	Somewhat Agree	Does not apply to me/ No Opinion	Somewhat Disagree	Strongly Disagree	Total Agree	Total Disag.	Net Agree
I don't really know how to reach my travel destination using the bus	13%	26%	7%	24%	30%	39%	54%	-15
The bus service does not consistently arrive on time	9%	30%	33%	20%	8%	39%	28%	+11
There is no bus stop close to my home that I can use	20%	17%	6%	19%	38%	37%	57%	-20
I worry I might end up on the wrong route when riding the bus	9%	25%	7%	24%	35%	34%	59%	-25
I worry I will not be able to find a seat on the bus	7%	27%	13%	30%	24%	33%	54%	-20
I worry I might end up in the wrong place when riding the bus	9%	25%	7%	24%	36%	33%	60%	-27
I am not sure where to catch the bus	6%	20%	8%	23%	42%	26%	66%	-40
The fare payment system is difficult to understand	5%	20%	17%	24%	34%	25%	58%	-33
The bus is too expensive	4%	18%	15%	31%	32%	21%	63%	-42

E2INT. Please indicate if you agree or disagree with each of the following statements.

King County METRO
We'll Get You There

The barriers to riding Metro are similar for non-commuters as commuters but those issues slightly less pronounced for them across the board.

Among Potential Rider Non-Commuters (n=965)

Legend: ■ Strongly Agree ■ Somewhat Agree ■ Does not apply to me/No Opinion ■ Somewhat Disagree ■ Strongly Disagree

Statement	Strongly Agree	Somewhat Agree	Does not apply/No Opinion	Somewhat Disagree	Strongly Disagree	Total Agree	Total Disag.	Net Agree
It is important to me to minimize the impact of my travel on the environment	32%	44%	12%	7%	5%	76%	13%	+63
Traveling by bus takes too long	34%	40%	7%	13%	6%	74%	19%	+55
Traveling by bus does not offer enough flexibility for my schedule	33%	36%	14%	12%	5%	69%	17%	+51
Traveling by bus is less expensive than driving	33%	36%	10%	15%	6%	69%	21%	+48
It's a hassle to have to plan bus trips ahead of time	20%	44%	8%	17%	11%	64%	28%	+36
The bus system doesn't go where I need it to go	25%	36%	15%	17%	8%	61%	24%	+37
I have concerns for my personal safety at bus stops	14%	33%	10%	25%	19%	47%	44%	+3
The bus system doesn't run when I need it to run	18%	29%	22%	21%	11%	46%	32%	+14
I have concerns for my personal safety on the bus	11%	34%	10%	25%	21%	45%	45%	-1
I don't really know how to reach my travel destination using the bus	14%	28%	11%	22%	25%	42%	47%	-5
There is no bus stop close to my regular travel destination that I can use	18%	19%	21%	21%	21%	37%	42%	-4

E2INT. Please indicate if you agree or disagree with each of the following statements.

Amenities & Service Changes – PR Commuters

For commuters, increasing the speed of service (58% much more likely) and more bus routes (51%) are their best-testing incentives towards ride Metro more often. Other top testing amenities and service improvements include more bus routes within a quarter of home/work (42%), real-time schedule info online (40%) and at stops (38%), and more frequent bus service (39%).

Among Potential Rider Commuters (n=1,182)

■ Much more likely   ■ Somewhat more likely   **Total More Likely**

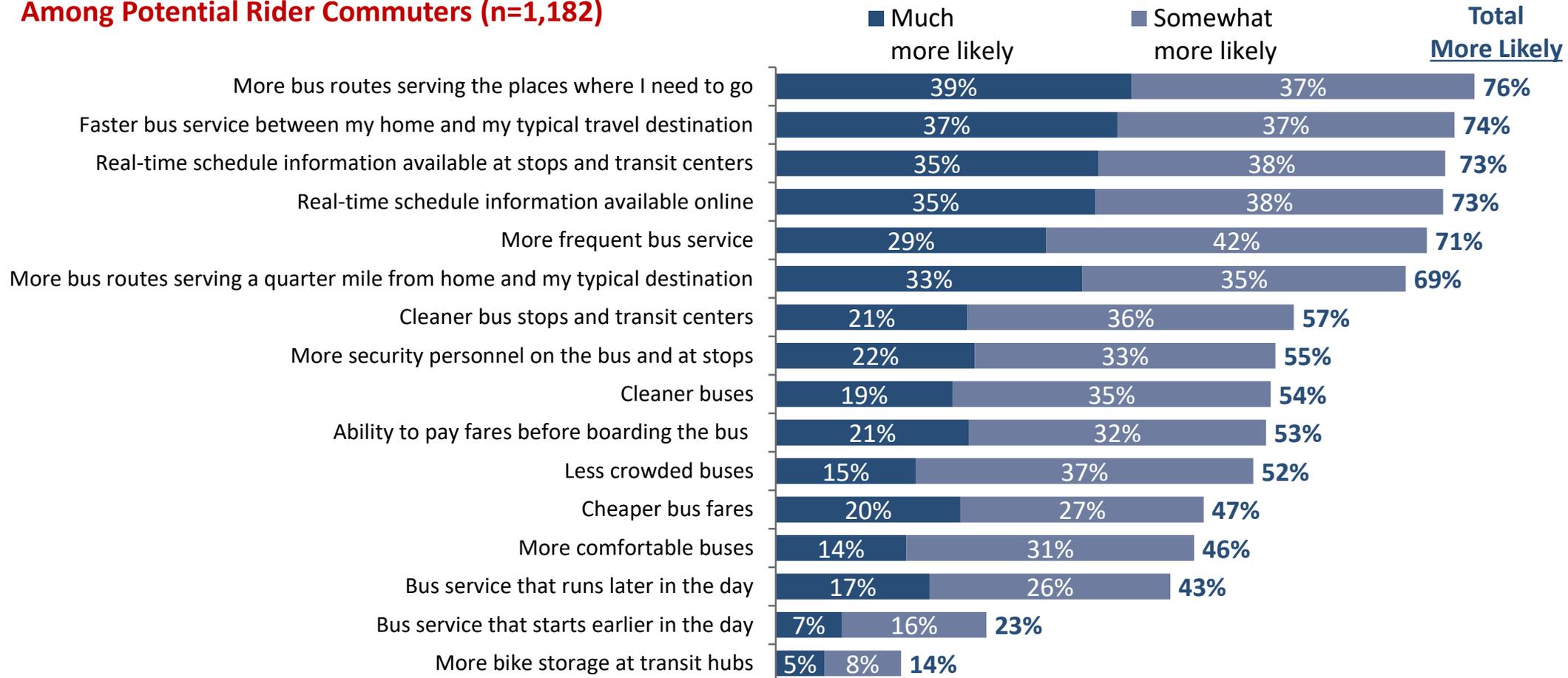| Amenity / Service Change	Much more likely	Somewhat more likely	Total More Likely
Faster bus service between my home and my typical travel destination	58%	29%	**87%**
More bus routes serving the places where I need to go	51%	34%	**86%**
More frequent bus service	39%	40%	**80%**
Real-time schedule information available at stops and transit centers	38%	40%	**78%**
Real-time schedule information available online	40%	38%	**78%**
More bus routes serving a quarter mile from home and my typical destination	42%	35%	**77%**
Cleaner bus stops and transit centers	25%	34%	**60%**
Cleaner buses	24%	34%	**58%**
Less crowded buses	19%	40%	**58%**
Ability to pay fares before boarding the bus	25%	30%	**55%**
More security personnel on the bus and at stops	24%	30%	**54%**
Bus service that runs later in the day	22%	31%	**53%**
More comfortable buses	17%	35%	**52%**
Cheaper bus fares	22%	27%	**49%**
Bus service that starts earlier in the day	17%	23%	**40%**
More bike storage at transit hubs	7%	14%	**21%**

E4INT. Below is a list of potential service changes and amenities that Metro could offer for its bus service. For each of the following, please indicate whether that potential service change or amenity would make you more likely or not to ride Metro more often.

Among non-commuters, the top-testing amenities and service changes mirror those desired by commuters, albeit with lower intensity.

Among Potential Rider Commuters (n=1,182)

■ Much more likely   ■ Somewhat more likely   **Total More Likely**

Service Change / Amenity	Much more likely	Somewhat more likely	Total More Likely
More bus routes serving the places where I need to go	39%	37%	**76%**
Faster bus service between my home and my typical travel destination	37%	37%	**74%**
Real-time schedule information available at stops and transit centers	35%	38%	**73%**
Real-time schedule information available online	35%	38%	**73%**
More frequent bus service	29%	42%	**71%**
More bus routes serving a quarter mile from home and my typical destination	33%	35%	**69%**
Cleaner bus stops and transit centers	21%	36%	**57%**
More security personnel on the bus and at stops	22%	33%	**55%**
Cleaner buses	19%	35%	**54%**
Ability to pay fares before boarding the bus	21%	32%	**53%**
Less crowded buses	15%	37%	**52%**
Cheaper bus fares	20%	27%	**47%**
More comfortable buses	14%	31%	**46%**
Bus service that runs later in the day	17%	26%	**43%**
Bus service that starts earlier in the day	7%	16%	**23%**
More bike storage at transit hubs	5%	8%	**14%**

E4INT. Below is a list of potential service changes and amenities that Metro could offer for its bus service. For each of the following, please indicate whether that potential service change or amenity would make you more likely or not to ride Metro more often.