2020 Customer Survey
Findings

Presented to
RideKC

By
ETC Institute
HNTB

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ETC Institute: A National Leader in Market Research for Local Governmental Organizations

...helping local governments gather and use survey data to enhance organizational performance for more than 30 years

More than 2,550,000 persons surveyed since 2010 for more than 1,000 local governments, including 50 transit agencies, in all 50 States
Purpose of the Survey

• Better understand the characteristics of riders on RideKC’s Bus, MAX, Flex and Micro Transit Services
• Objectively assess satisfaction with RideKC’s performance
• Assess how COVID-19 impacted ridership
• Identify opportunities for improvement
**Methodology**

- Surveys were administered in Oct-Nov 2020 once ridership had returned to 80% of Pre-COVID-19 levels
- Surveys were collected from a random sample of more than 2,300 bus riders, including:
  - 422 on MAX routes
  - 1,819 on Local/Fixed routes
  - 61 on Express routes.
- Surveys were also collected from 261 RideKC Flex users and 161 RideKC Micro Transit users
- The results were statistically valid for riders on all services that were surveyed
Methodology
Innovation was needed this year!
Findings from the Rider Survey

RideKC’s Zero–Fare Policy and the Agency’s Quick Response to COVID–19 Appear to Have Had A Very Positive Impact on Ridership
Q6-12. Satisfaction with RideKC’s Policies and Procedures to Keep Riders Safe During the COVID-19 Pandemic

by percentage of respondents (excluding “not provided”)

Top Rated Action: Suspended fares - 67.4%
Mandatory masks for drivers - 56.1%
Mandatory masks for passengers - 53.9%
Signs onboard for passenger spacing - 48.1%
Rear door boarding - 50.9%
Additional cleaning and sanitizing - 48.8%
Limiting vehicle capacity - 45.9%
How RideKC’s Ridership Compared to the Nation Last Year

• *In April 2020*
  – National Ridership was just 20% of 2019 levels
  – RideKC’s ridership was 58% of 2019 levels

• *By October 2020*
  – National Ridership was still just 40% of 2019 levels
  – RideKC had rebounded to 80% of 2019 levels
Findings from the Rider Survey

RideKC made it possible for thousands of essential workers to get to/from work during the COVID-19 Pandemic
The Top Reason Riders Have Been Using RideKC During the Pandemic Has Been to Get to Work

Bus/MAX Riders

Q34. Why Customers Continued to Use RideKC Transit Throughout the COVID-19 Pandemic
by percentage of respondents who have continued to use RideKC transit throughout COVID-19 pandemic (multiple selections could be made)

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work</td>
<td>47.3%</td>
</tr>
<tr>
<td>Grocery/family needs</td>
<td>16.9%</td>
</tr>
<tr>
<td>Leisure, social, entertainment</td>
<td>15.2%</td>
</tr>
<tr>
<td>Health/medical</td>
<td>11.4%</td>
</tr>
<tr>
<td>Job seeking</td>
<td>7.8%</td>
</tr>
<tr>
<td>Education</td>
<td>6.0%</td>
</tr>
<tr>
<td>Other</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

Source: ETC Institute (2020)
Many Riders Do Not Have Other Alternatives for Getting to Work

Without RideKC, thousands of people would not have been able to get to work during the Pandemic

Q32. Main Reasons for Using Transit

by percentage of respondents (multiple selections could be made)

- No access to car: 44.0%
- Save money on parking: 24.8%
- Convenient access to destinations: 22.1%
- Save money on gas/automobile: 21.5%
- Avoid the stress of driving: 17.4%
- Saves time: 6.0%
- Prefer to live a car-free lifestyle: 5.8%
- Reduce environmental footprint: 5.6%
- Subsidized by employer, etc.: 2.1%
- Other: 1.3%

Source: ETC Institute (2020)
RideKC Has Been Making It Possible for “Essential Workers” to Get to Work During the Pandemic

A Majority of RideKC Flex Users Who Are Employed Are “Essential Workers”

Source: ETC Institute (2020)
Findings from the Rider Survey

In spite of great challenges this year, satisfaction with RideKC remains high and ratings improved in most areas
Overall Satisfaction Is Very High

Q27. Overall Satisfaction with RideKC Experience
by percentage of respondents

Bus/MAX Riders

86% of Bus/MAX Riders
97% of Flex Riders
96% of Micro Transit Users

Source: ETC Institute (2020)
Satisfaction Increased in Most Areas

The biggest increase was with the “Helpfulness of Call Center Representatives” which was up +9% from 2019.
Findings from the Rider Survey

RideKC Should Continue to Emphasize Reliability and On-Time Performance to Sustain High Levels of Satisfaction in the Future
Service Reliability and On-Time Performance Are the Top Priorities for Riders

Which elements listed in the previous questions are most important to you?

by percentage of respondents who selected the item as one of their top two choices

- Reliability of service: 24.6% (2019), 28.6% (2020)
- Vehicles running on schedule: 22.0% (2019), 27.0% (2020)
- Personal safety while riding: 10.0% (2019), 10.3% (2020)
- Cleanliness of vehicles: 8.8% (2019), 9.0% (2020)
- Personal safety while waiting at shelters/stops: 7.2% (2019), 10.3% (2020)
- Access to stations & shelters: 6.3% (2019), 4.1% (2020)
- Professionalism/friendliness of operators/staff: 9.7% (2019), 4.7% (2020)
- Vehicle comfort & features: 4.7% (2019), 3.6% (2020)
- Condition of stations: 3.0% (2019), 2.8% (2020)
- Helpfulness of Call Center representatives: 3.4% (2019), 2.1% (2020)
- Amenities at transit centers: 2.6% (2019), 1.3% (2020)

More important in 2020: Reliability of service, Vehicles running on schedule
Less important in 2020: Professionalism/friendliness of operators/staff
Best Ways to Enhance Satisfaction and Retain Existing Customers

<table>
<thead>
<tr>
<th>Category of Service</th>
<th>Most Important %</th>
<th>Most Important Rank</th>
<th>Satisfaction %</th>
<th>Satisfaction Rank</th>
<th>Importance-Satisfaction Rating</th>
<th>I-S Rating Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Increase Current Emphasis (0.05≤I-S&lt;0.10)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vehicles running on schedule</td>
<td>26%</td>
<td>2</td>
<td>66%</td>
<td>6</td>
<td>0.0890</td>
<td>1</td>
</tr>
<tr>
<td>Reliability of service</td>
<td>29%</td>
<td>1</td>
<td>70%</td>
<td>3</td>
<td>0.0861</td>
<td>2</td>
</tr>
<tr>
<td><strong>Maintain Current Emphasis (I-S&lt;0.05)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal safety while riding</td>
<td>10%</td>
<td>3</td>
<td>68%</td>
<td>5</td>
<td>0.0335</td>
<td>3</td>
</tr>
<tr>
<td>Cleanliness of vehicles</td>
<td>9%</td>
<td>4</td>
<td>65%</td>
<td>7</td>
<td>0.0312</td>
<td>4</td>
</tr>
<tr>
<td>Personal safety while waiting at shelters/stops</td>
<td>7%</td>
<td>5</td>
<td>61%</td>
<td>9</td>
<td>0.0275</td>
<td>5</td>
</tr>
<tr>
<td>Access to stations and shelters</td>
<td>6%</td>
<td>6</td>
<td>60%</td>
<td>11</td>
<td>0.0251</td>
<td>6</td>
</tr>
<tr>
<td>Onboard security</td>
<td>5%</td>
<td>8</td>
<td>57%</td>
<td>12</td>
<td>0.0195</td>
<td>7</td>
</tr>
<tr>
<td>Professionalism/friendliness of operators and staff</td>
<td>5%</td>
<td>7</td>
<td>72%</td>
<td>1</td>
<td>0.0131</td>
<td>8</td>
</tr>
<tr>
<td>Vehicle comfort and features</td>
<td>4%</td>
<td>9</td>
<td>69%</td>
<td>4</td>
<td>0.0110</td>
<td>9</td>
</tr>
<tr>
<td>Condition of stations</td>
<td>3%</td>
<td>10</td>
<td>64%</td>
<td>8</td>
<td>0.0110</td>
<td>10</td>
</tr>
<tr>
<td>Helpfulness of Call Center Representatives</td>
<td>2%</td>
<td>11</td>
<td>70%</td>
<td>2</td>
<td>0.0063</td>
<td>11</td>
</tr>
<tr>
<td>Amenities at transit centers</td>
<td>1%</td>
<td>12</td>
<td>61%</td>
<td>10</td>
<td>0.0051</td>
<td>12</td>
</tr>
</tbody>
</table>

The recommendations from this analysis are based on (1) the importance riders place on each service area and (2) how well RideKC is doing in each area. Areas of high importance and low satisfaction rank highest.
Summary

- RideKC’s Zero-Fare policy and the agency’s response to COVID-19 appear to have helped RideKC avoid the massive drops in ridership that most agencies experienced last year.

- RideKC made it possible for thousands of essential workers to get to/from work during the COVID-19 Pandemic.

- In spite of the great challenges this year, satisfaction with RideKC remains high and ratings improved in most areas.

- RideKC should continue to emphasize reliability and on-time performance to sustain high levels of satisfaction in the future.