



# GoRaleigh Customer Survey Summary Report

September 2016

Prepared by:



Prepared for:



# Summary

In the fall of 2015, GoRaleigh conducted an on-board fixed route transit customer survey in coordination with other transit providers in Wake County, including GoTriangle, C-Tran, and Wofline to collect data on trip profiles, demographic characteristics, customer satisfaction, perception and brand awareness. The survey findings for GoRaleigh are summarized here and presented in greater detail on the pages that follow.

## Survey Purpose

The on-board survey was conducted to support GoRaleigh’s ongoing efforts to identify needs and determine potential improvements in the delivery of transit service and it builds on a similar survey effort in 2010. The results for all Wake County transit systems for the current survey will also be used as inputs to the regional Transportation Demand Model (TDM) in support of the upcoming Capital Area Metropolitan Transportation Plan update.

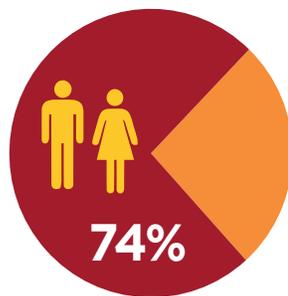
## Major Findings

Key findings from the survey are highlighted below. More detailed findings from the survey are presented in the report.

### Bus transit is a vital form of transportation in the City of Raleigh

GoRaleigh riders use transit to get to major destinations like their homes, job, and learning institutions. The vast majority of riders are walking to their bus (94 percent), and to their final destinations (97 percent).

Access to transit is also vital, with more than half of riders indicating they have no working vehicle available to their household, and most of those who do have one available indicating they cannot use the vehicle for their trips. Combining these findings with the data showing that 66 percent of riders are employed either part-time or full-time, and 8 percent are students, further highlights transit as a necessity for many riders to get to work, school, home, and other daily destinations. In



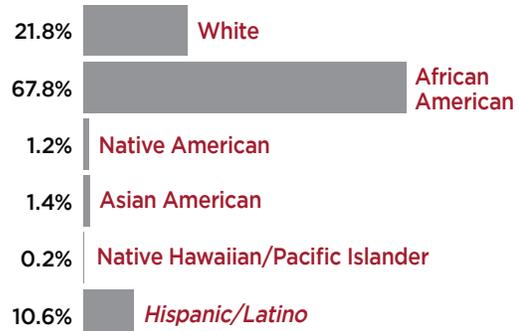
**Riders Employed Full or Part-time**

addition, high percentages of riders using GoRaleigh transit report low household incomes. For example, more than one-quarter (26 percent) of riders lived in households that earned less than \$15,000 (in 2014) and nearly two-thirds live in households that earned annual incomes within 150% of the federal poverty level. This compares with a median household income in Raleigh of \$54,581.

### Bus transit serves a diverse population in the City of Raleigh

GoRaleigh serves a broad and diverse ridership. Race and ethnicity data from the 2010-2014 American Community Survey (ACS) evaluated alongside survey responses show that non-white and non-Asian populations comprise a higher proportion of transit ridership than their relative proportion of the city of Raleigh’s population. Demographic data collected during the survey indicates that there is a relatively even distribution of riders in terms of age. The largest proportion of riders (25 percent) are between the ages of 25-34, followed by 18-24 year olds (20 percent), 35-44 year olds (19 percent), 45-54 year olds (18 percent), and 55-64 year olds (10 percent). Low percentages of riders are under age 18 (2 percent) or over age 65 (6 percent).

#### Race and Ethnicity•



*\*Percentages do not add to 100% and reflect individuals who identify as more than one race or who identify by both Hispanic/Latino ethnicity and race.*

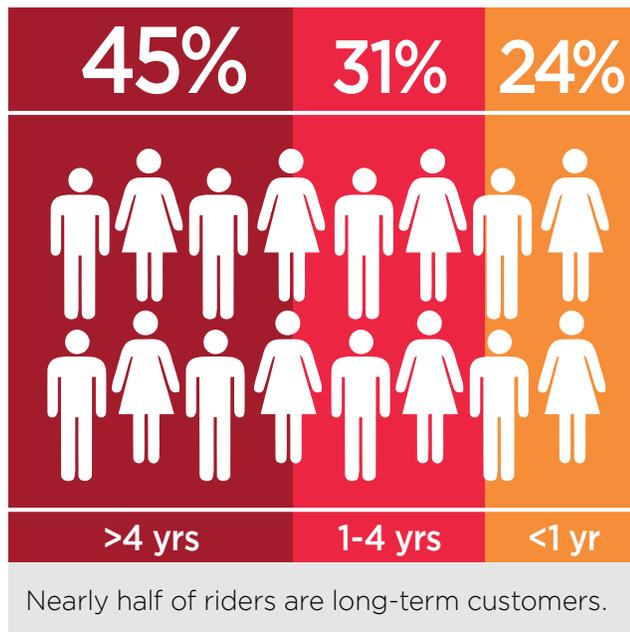
According to the most recently available U.S. Census Bureau data (2010), 51.7% of the City of Raleigh's population is female. This slightly contrasts with the gender profile of GoRaleigh ridership.

### Age and Gender of Riders



Ridership tenure among GoRaleigh riders also reflects some diversity as illustrated below. However, nearly half of riders are long-term customers.

### Number of Years Riding the Bus



### Riders are satisfied with GoRaleigh



The survey included questions to help GoRaleigh understand customers' perceptions of the agency's performance. The highest levels of customer satisfaction (riders were either satisfied or very satisfied) occurred with: on-board safety/security (83 percent), comfort of buses (80 percent), easy-to-understand route information (79 percent), safety of bus stops (77 percent), courtesy of drivers (76 percent), safety of drivers (74 percent), fare/cost to ride (73 percent), and cleanliness (70 percent). Performance of buses running on time, and the frequency of service receive relatively high levels of satisfaction, with about 66 percent of riders indicating they are either satisfied or very satisfied with the on-time performance of buses, and about 63 percent indicating they are either satisfied or very satisfied with the frequency of service. Aspects of service with higher percentages of riders being either dissatisfied, or very dissatisfied include weekend service (43 percent) and bus stop amenities (32 percent). About 25 percent of riders also indicate they are dissatisfied or very dissatisfied with hours of service.

# Survey Approach Overview

The survey was conducted by interviewers using hand-held tablets on-board transit buses for all transit agencies serving Wake County. The survey included questions about trip characteristics, rider demographics, and customer satisfaction and perception of transit agencies. It included questions required to meet data requirements of the regional travel demand model, Metropolitan Transportation Plan (MTP) update, and has incorporated or updated questions from previous on-board surveys as appropriate. The survey methodology and survey questions were developed with input from each agency and reviewed and approved by each agency.

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## Survey Instrument

The survey included questions about trip characteristics, rider demographics, and customer satisfaction and perception of transit agencies. It incorporated questions required to meet data requirements of the regional travel demand model and metropolitan transportation plan (MTP) update and updated questions from previous on-board surveys. GoRaleigh's survey included additional questions designed to measure brand awareness.

### Data collected:

- Route surveyed, time and direction
- Transfer information
- Origin and destination
- Boarding and alighting location
- Access and egress modes
- Trip purpose
- Method of payment
- Demographic information
- Customer satisfaction
- Brand awareness (GoRaleigh only)

## Survey Sampling and Dates

Surveying occurred on Mondays, Tuesdays, Wednesdays, and Thursdays between October 5, 2015 and November 19, 2015. A sampling plan for weekday travel was developed using historic average weekday ridership by route. The full survey schedule and sampling goals for all systems, routes, directions, and time periods are included in the

[Wake County Transit Systems Customer Survey Summary Report.](#)

- AM Peak (6:00 AM – 9:59 AM)
- Midday (10:00 AM – 3:29 PM)
- PM Peak (3:30 PM – 7:29 PM)
- Evening (7:30 PM – 12:00 AM)

## Survey Administration

The survey team used an interview technique aided by tablets that integrates geographic information system (GIS) software to allow for accurate geocoding of most survey data as the survey is taken. Riders were selected at random to participate in the survey based on the sampling goals for each route. After the surveys were administered on board, survey records were reviewed to ensure all necessary information was provided. If any information was missing, survey respondents were called to complete the survey by phone. Spanish-speaking surveyors and surveys translated into Spanish were made available.

## Training and Testing

All surveyors received classroom and field training prior to the on-board survey administration. Surveyors who were unable to demonstrate proficiency in all survey-related tasks were replaced. Surveyors were also reviewed throughout the data collection effort and were retrained if issues were encountered. A pilot test of the survey instrument was conducted in conjunction with training sessions and used to make changes to the survey instrument and methodology.

## Data Processing

To analyze the results of the surveys, the sample data was expanded to the full ridership by route, using expansion factors based on total daily ridership. The expanded data was used for all of the results and analysis presented in this report. Details

on completed surveys and the sample expansion are included in the Wake County Transit Systems Customer Survey Summary Report. The survey methodology and survey questions were developed with review and input from each agency.

## Trip Characteristics

Trip information will help GoRaleigh understand how its fixed route services are being used by its customers, and can help determine potential service enhancements. Origins and destinations, mode of transportation used to get to the buses and final destinations, number of transfers, and types of fares and payment methods are trip characteristics discussed in this section.

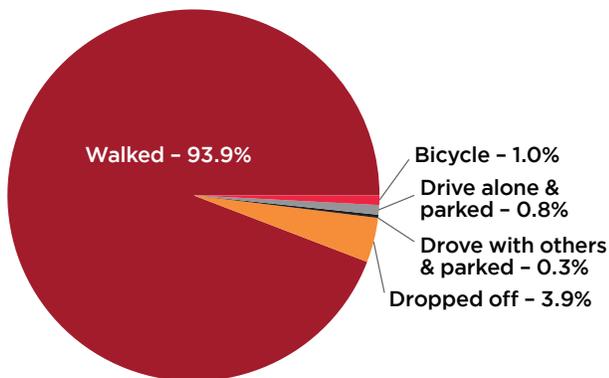
### How did you get to your first bus?

The weighted and expanded results for GoRaleigh riders when asked how they got to the bus for the start of their one-way trip are shown in the chart below.

#### Key Findings:

- The vast majority of riders walk to the bus (93.9%).
- A small minority of riders get dropped off (3.9%), bicycle (1.0%), drive alone (0.8%), or drive with others (0.3%).

#### How Riders get to First Bus



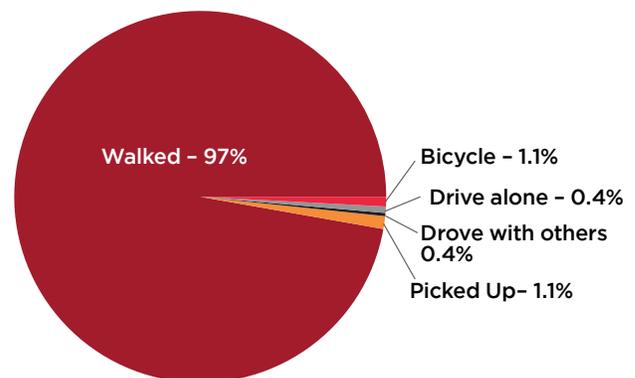
### How will you get to where you are going when you get off your last bus?

The weighted and expanded results for GoRaleigh riders when asked how they would get to their destination from the very last bus they would use for their one-way trip are shown in the chart below.

#### Key Findings:

- The vast majority of GoRaleigh riders walk to their destinations (97.0%).
- A small minority of riders bicycle (1.1%), get picked up (1.1%), drive with others (0.4%), or drive alone (0.4%) to get to their destinations.

#### How Riders reached Destination after getting off Bus



## What are your primary origin-destination and trip purposes?

Response data for the origin and destination questions, “Where was the very last place you were before getting on the bus?” and “Where are you going once you get off your last bus on this one-way trip?” are summarized in table below. The top-10 most-frequently occurring origin and destination pairs by GoRaleigh ridership are shown. In the table on the right, the most commonly occurring trip purposes and their frequencies are shown.

Trip Purpose Summary		
Trip Purpose	Total	Percent
Place of Employment	9,411	38.6%
Shopping	2,814	11.5%
Social Visit	2,764	11.3%
Other	2,199	9.0%
College/University	1,758	7.2%
Other Work Related	1,578	6.5%
Medical	1,518	6.2%
Restaurant	1,169	4.8%
Recreation	685	2.8%
School (K-12)	469	1.9%
<b>Total</b>	<b>24,365</b>	<b>100.0%</b>

### Key Findings:

- The largest subset of ridership commutes to work (38.6%) with 8,760 daily trips being made from either home-to-work or work-to-home.
- The second largest subset of ridership makes a shopping trip (11.5%) with 3,469 daily trips being made from either shopping-to-home or home-to-shopping.

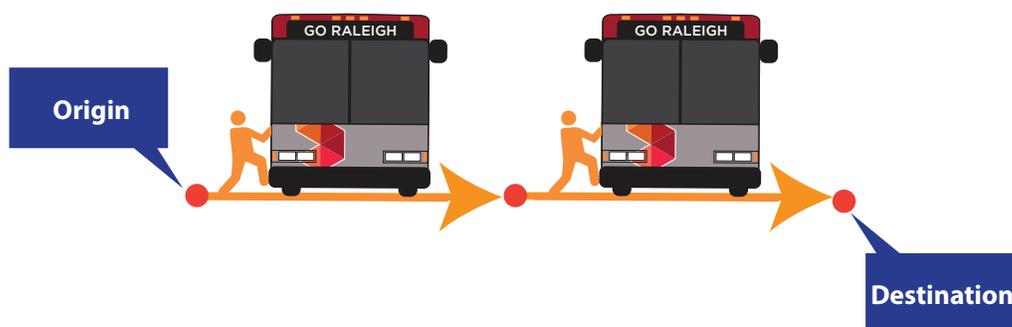
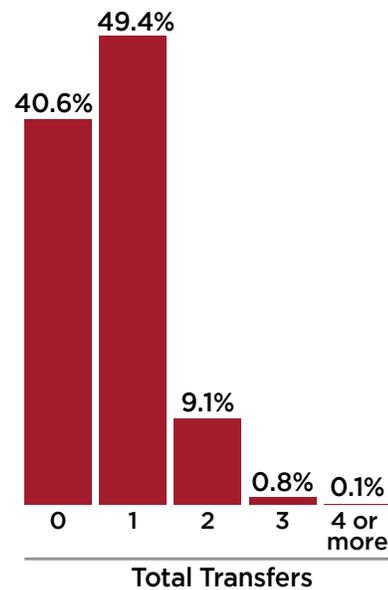
## How many total transfers will you make during your one-way trip?

The weighted and expanded results for GoRaleigh riders when asked “how many bus transfers did you make before you boarded” and “how many buses will you ride after you get off this bus” are shown in the chart below. These questions were used in conjunction to determine the total number of transfers riders made during their one-way trip.

### Key Findings:

- The largest subset of riders (49.4%) will make one transfer and the second largest subset (40.6%) will make no transfers.
- A minority of riders (6.9%) will make two, three (0.9%) and four or more (0.1%) transfers.

Number of Transfers made for One-Way Trip



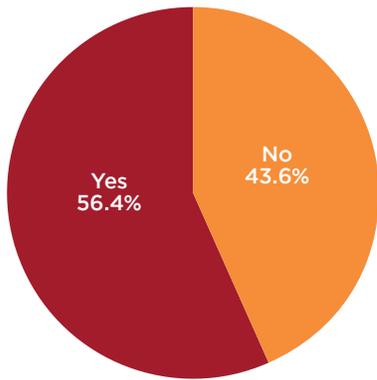
### Will you (or did you) make this trip using the same transit routes in exactly the opposite direction today?

The weighted and expanded results for GoRaleigh riders when asked if they would make the same trip in the opposite direction are shown in the chart below. This information helps to highlight commuting patterns along routes, and whether or not respondents use the same route on their return trip.

#### Key Findings:

- Slightly more than half of all riders (56.4%) make the same trip in the opposite direction.

#### Riders Making Same Transit Trip in Opposite Direction



### Fare Type: For this one-way trip did you...?

The weighted and expanded results for GoRaleigh riders when asked about the type of fare they paid for their one-way trip are shown in the chart and table below.

#### Key Findings

- Almost four-fifths (79.2) of all riders paid full fares.
- A small percentage of riders paid discount fares (9.2%) or rode for free (6.1%).

#### Type of Fare Used to Pay for Trip



Full Fare	
Pay full fare (cash or regular pass purchase)	79.2%
Discounted Fare	
Pay a person with a disability fare	5.8%
Pay a youth fare	0.6%
Pay a senior fare	2.8%
Free	
Ride GoRaleigh or C-Tran for free as Youth 12 and under	0.2%
Ride GoRaleigh for free with Senior (65+)	2.2%
Ride free route (R-Line or Wake Forest Loop)	3.7%
Employer Paid	
Use a transit pass provided by employer or university	5.5%

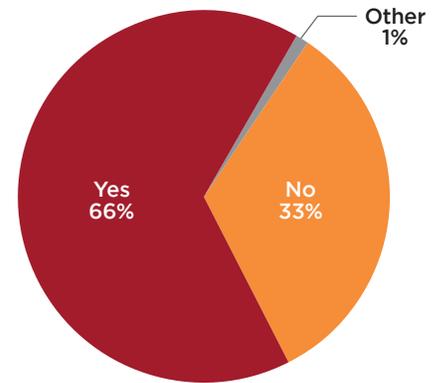
## Did you use a transit pass or card?

The chart to the right illustrates responses from riders when asked if they used a transit pass or card. This will help GoRaleigh understand how many riders use passes compared to paying cash or riding for free.

### Key Findings

- A substantial majority of riders (73.3%) use a transit pass or card.

Rider used Transit Pass or Card for the Trip



## What type of transit card did you use for this one-way trip?

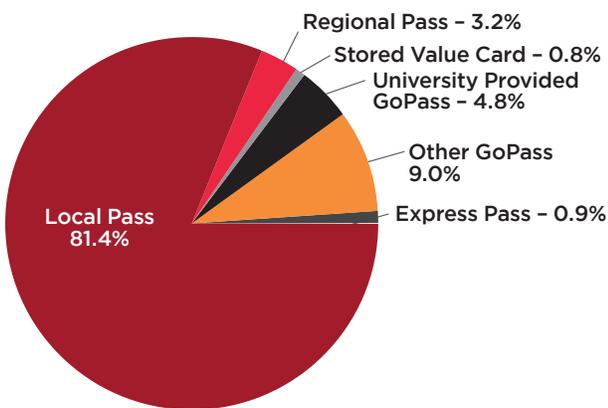
### Local, Regional, Express

Riders who indicated they use a transit pass or card were asked what type of transit pass or card they used for their one-way trip. Pass types are summarized below by whether they are of the local, regional, or express variety. For example, the “Local Day Pass,” “Local 7-Day Pass,” and “Local 31-Day Pass” are reported as “Local Day Pass”.

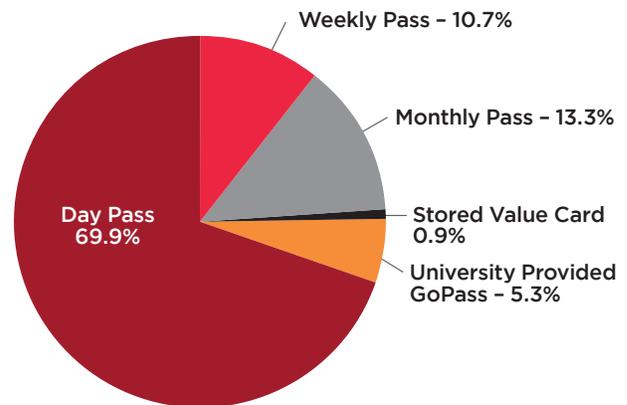
### Daily, Weekly, Monthly

In the pie chart below pass types are summarized by length of coverage. For example, the “Express 7-Day Pass,” “Local 7-Day Pass,” and “Regional 7-Day Pass” are reported as “Weekly Pass”. GoPasses and Stored Value Cards are presented again in this section because they cover all periods.

Type of Card used for One-Way Trip



Card Length of Coverage



### Key Findings

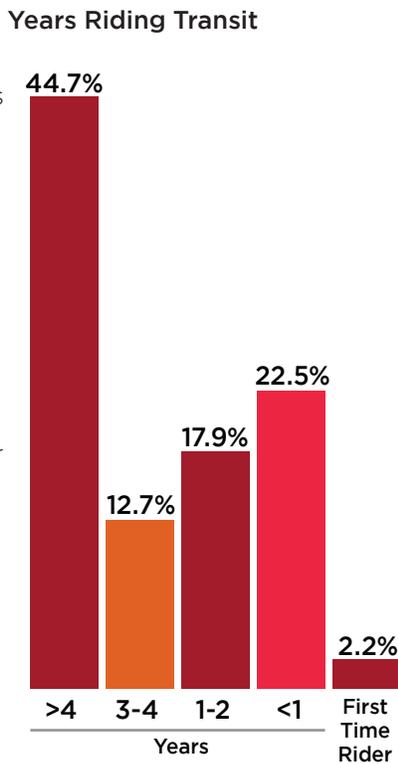
- A substantial majority of riders (69.9%) use a day pass.
- Some riders use a 31-day pass (13.3%).
- A minority of riders use a 7-day passes (10.7%).

# Rider and Household Characteristics

Data that describe the demographic characteristics of fixed route transit riders include age, gender, race and ethnicity, and household income, as well as the number of available cars in the household, number of people in the household, and employment status are included in this section. These questions also address frequency and longevity of riding transit of riding transit. The responses to these questions will help GoRaleigh understand the populations they serve and deliver services that meet their needs.

## How long have you been riding transit?

The weighted and expanded results for GoRaleigh riders when asked about length of transit ridership are shown in the chart below. Data about riders' tenure riding the transit system can provide insight on things like customer loyalty, whether each system is attracting new riders, and rider familiarity with the agency and their routes.

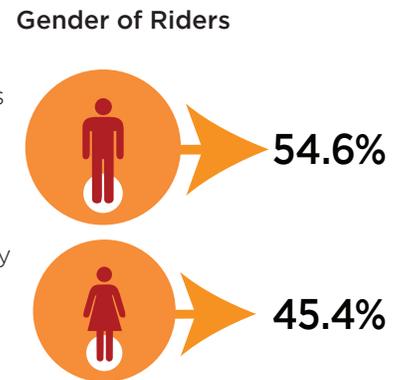


### Key Findings:

- The largest subset of riders (44.7%) has been riding GoRaleigh more than 4 years.
- A similar percentage of riders have been riding GoRaleigh for 1 to 2 years (17.9%) or less than 1 year (22.5%).

## What is your gender?

According to the most recently available U.S. Census Bureau data (2010), 51.7% of the City of Raleigh's population is female. This slightly contrasts with the gender profile of GoRaleigh ridership. Survey responses indicate that males are riding transit at a higher rate than their female counterparts.



### Key Findings:

- Males make up more riders than females.
- Results vary slightly from the gender make up of the City of Raleigh.

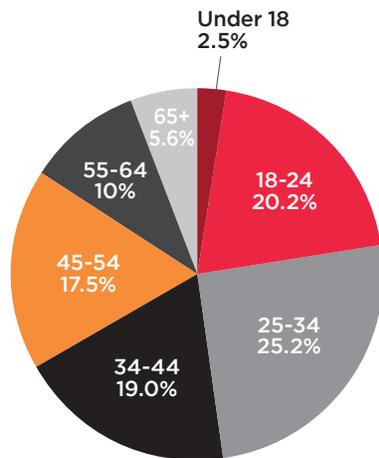




## What is your age?

The weighted and expanded results for GoRaleigh riders when asked to identify their age are shown in the table and chart to the right. This information helps GoRaleigh understand the age distribution of their riders. A higher proportion of 18-34 year-olds use GoRaleigh's services, relative to their proportion of the City of Raleigh's population (in evaluation with the most recent American Community Survey data available [2010-2014]).

**Age of Riders**



### Key Findings:

- The largest age group of riders (25.2%) is between 25-34 years.
- Riders are evenly distributed among 18-24 years (20.2%), 35-44 years (19.0%), and 45-54 years (17.5%).
- The lowest percentages of riders are 65 years or older (5.6%) and under 18 years (2.5%).

Responses for GoRaleigh		
Response	Ridership Percent	City of Raleigh Percent
Under 18 years	2.5%	26.9% (Under 19 Yrs.)
18-24 years	20.2%	9.6% (20-24 Yrs.)
25-34 years	25.2%	18.0%
35-44 years	19.0%	15.2%
45-54 years	17.5%	12.5%
55-64 years	10.0%	9.0%
65+ years	5.6%	8.9%

## Do you have a valid driver's license?

Riders were asked if they have a valid driver's license. This information will help GoRaleigh understand the potential ability, or not, for passengers to drive themselves instead of taking transit.

### Key Findings

- A majority (63.5%) of riders do not have a valid driver's license.

### Do Riders have Valid Driver's License?



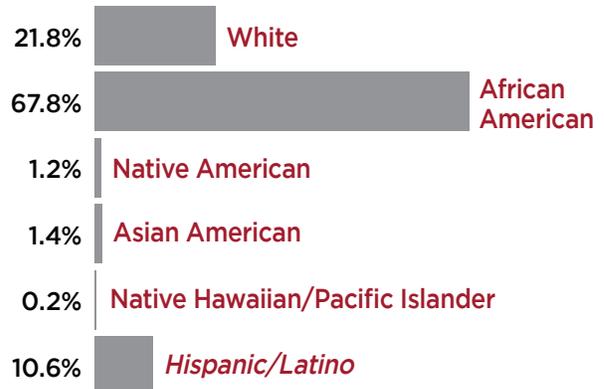
## How do you identify your race and ethnicity?

The weighted and expanded results for GoRaleigh riders when asked how they identify their race and ethnicity are shown in the bar chart and table. Riders could identify more than one race in addition to ethnicity, therefore percentage distributions may sum to greater than 100 percent. Race and ethnicity data from the 2010-2014 American Community Survey (ACS) evaluated alongside survey responses show that non-white and non-Asian populations comprise a higher proportion of transit ridership than their relative proportion of the City of Raleigh's population.

### Key Findings:

- More riders (67.8%) identify as African American than all other races.
- Many riders identify as White (21.8%).
- Some riders (10.6%) identify as ethnically Hispanic/Latino.

### Race and Ethnicity\*



\*Percentages do not add to 100% and reflect individuals who identify as more than one race or who identify by both Hispanic/Latino ethnicity and race.

Race and Ethnicity		
Response	Ridership Percent	City of Raleigh Percent
White (non-Hispanic)	21.8%	59.5%
African American (non-Hispanic)	67.8%	30.7%
Native American (non-Hispanic)	1.2%	1.1%
Asian (non-Hispanic)	1.4%	5.0%
Native Hawaiian or Pacific Islander (non-Hispanic)	0.2%	0.1%
Hispanic or Latino	10.6%	11.4%



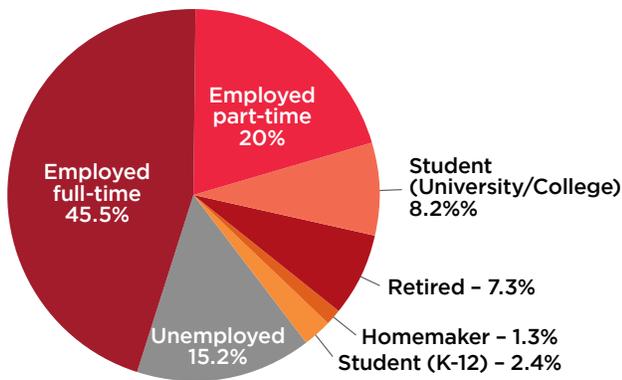
## Employment Status

The weighted and expanded results for GoRaleigh riders when asked to identify their employment status are shown in the pie chart below. This information helps GoRaleigh further understand the demographic make up of their riders. The largest percentage of riders are employed full-time, while part-time workers comprise the second largest group of riders.

### Key Findings:

- A majority of riders (65.5%) are employed full- or part-time.
- Some riders are unemployed (15.2%), University or College students (8.2%), or retired (7.3%).

### Employment Status of Riders



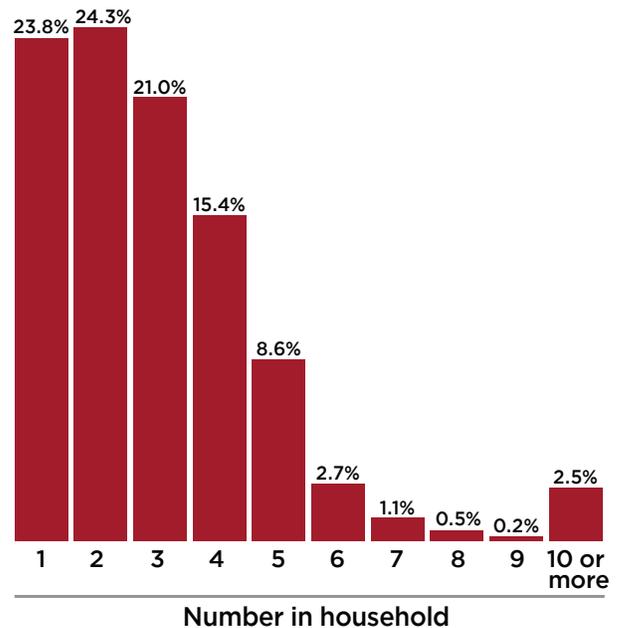
## Including you, how many people live in your household?

The weighted and expanded results for GoRaleigh riders when asked to identify how many people live in their household are shown in the chart. Results were fairly evenly distributed for households of one, two, and three people. As household sizes increased, the proportion of riders in those categories decreased, with the noted exception of households of 10 or more people.

### Key Findings:

- A substantial majority of riders (84.5%) live in households with four or fewer people.

### Number of People in Household



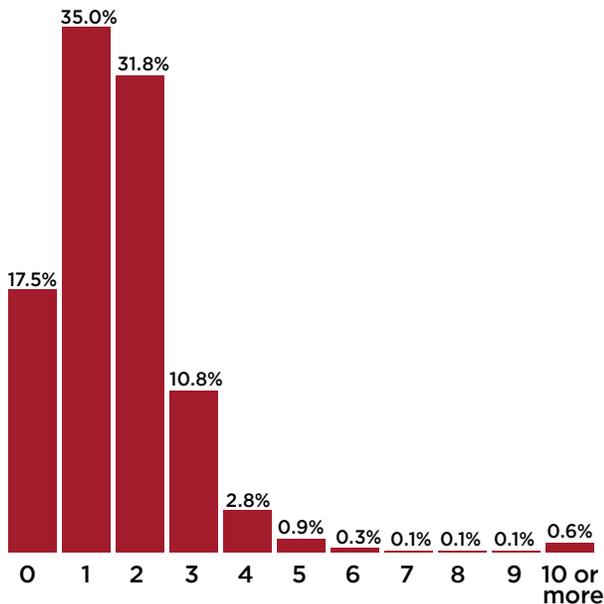
### Including you, how many people (16 or older) in your household are employed full or part-time?

The weighted and expanded results for GoRaleigh riders when asked to identify how many people, including themselves, are employed full or part-time are shown in the bar chart below. Riders living alone and with one other person employed full or part-time were the primary groups of riders. Individuals living with no employed household members made up 17.5% of riders, which is closely aligned to a previous question reflecting 15.2% of riders indicating they were unemployed.

#### Key Findings:

- A substantial majority of riders (84.3%) live with 3 or fewer employed household members.
- A majority of riders (52.5%) live with 1 or fewer employed household members.
- Some riders (17.5%) live with no employed household members.

**People in Household who are Employed (16 and older)**



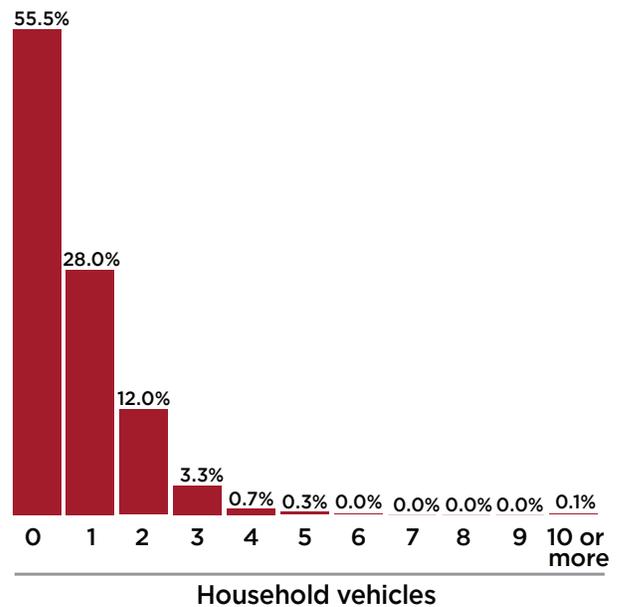
### How many working vehicles (cars, trucks or motorcycles) are available to your household?

The weighted and expanded results for GoRaleigh riders when asked to how many working vehicles are available to their household are shown in the bar chart. This information can help to inform GoRaleigh on transit necessity by determining how many riders use transit by choice, or due to lack of available transportation. As the results below indicate, the majority of respondents did not have an available vehicle, and were using transit as their main form of transportation. While other riders did have an available vehicle, the subsequent question provides additional detail into the availability of any vehicle, and transit as a main source of transportation, or as an alternative.

#### Key Findings:

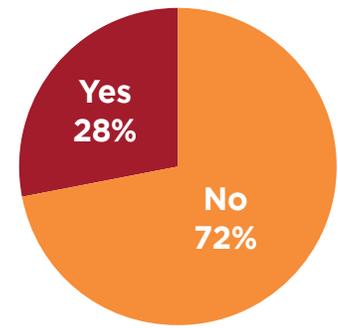
- A majority of riders (55.5%) have no vehicles available to their household.
- Some riders have 1 (28.0%) or 2 (12.0%) vehicles available to their household.

**Number of Working Vehicles Available to Household**



### Could you have used one of these vehicles for this trip?

The weighted and expanded results for GoRaleigh riders when asked if a working household vehicle was available for this trip are shown in the pie chart. The results show that a majority of riders could not have used an available vehicle for their trip. When reviewed with the preceding question, it helps to provide information on transit use as a necessity, or an option. The data indicates that a majority of riders use GoRaleigh as their main form of transportation due to lack of an available vehicle.



Could one of these vehicles have been used for your trip?

#### Key Findings:

- A substantial majority of riders (72.2%) could not have used one of their household’s vehicles for their trip.

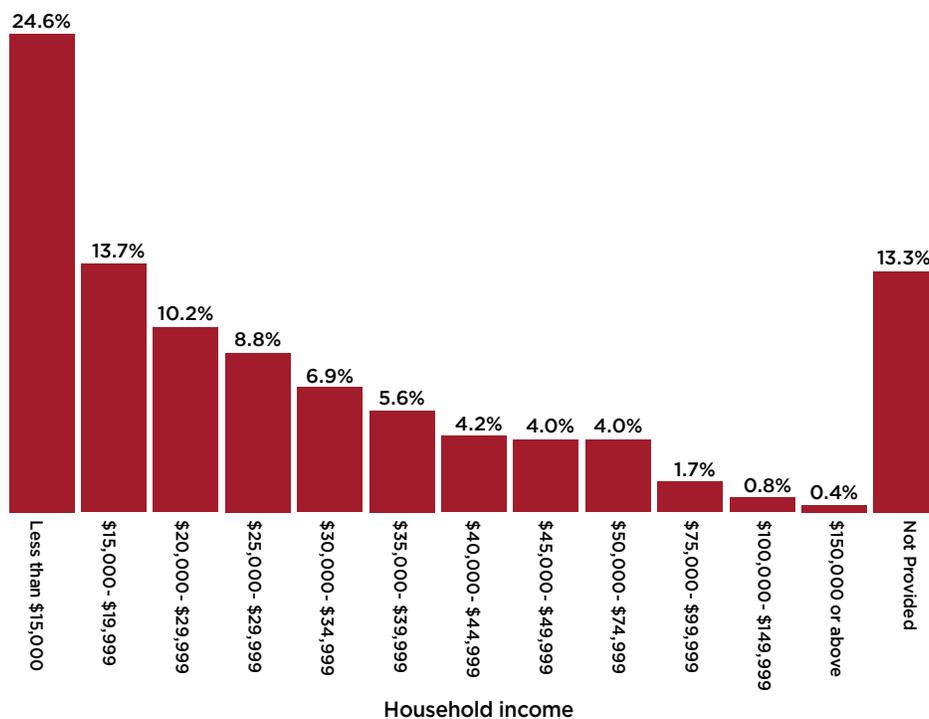
### Which of the following best describes your total annual household income in 2014 before taxes?

The weighted and expanded results for GoRaleigh riders when asked about their annual household income are shown in the chart below. It is important to note that the median household income in the City of Raleigh is \$54,581. Additionally, a significant amount of riders did not provide a response to this survey question (13.3%), likely because it may be perceived to be highly personal in nature.

#### Key Findings:

- The income range with the highest percentage of riders is ‘Less than \$15,000’ (26.4%).
- The income range with the second highest percentage of riders is ‘\$15,000 - \$19,999’ (13.7%).
- A substantial majority of ridership (79.8%) is below the City of Raleigh’s median household income.
- Non-responses could have potentially increased the proportion of ridership below the City of Raleigh median household income.

#### Total 2014 Annual Household Income before Taxes



# Customer Satisfaction, Perception, Brand Awareness for Fixed Route Service

Customer satisfaction questions, provide critical information related to performance, schedules, appearance, and convenience that enables GoRaleigh to determine potential areas for improvement in fixed route transit service provision to its customers. Responses to perception questions provide insight as to how customers feel about each transit agency. Brand awareness questions were asked on GoRaleigh routes only to gauge customers' awareness about the transition from Capital Area Transportation (CAT) to GoRaleigh.

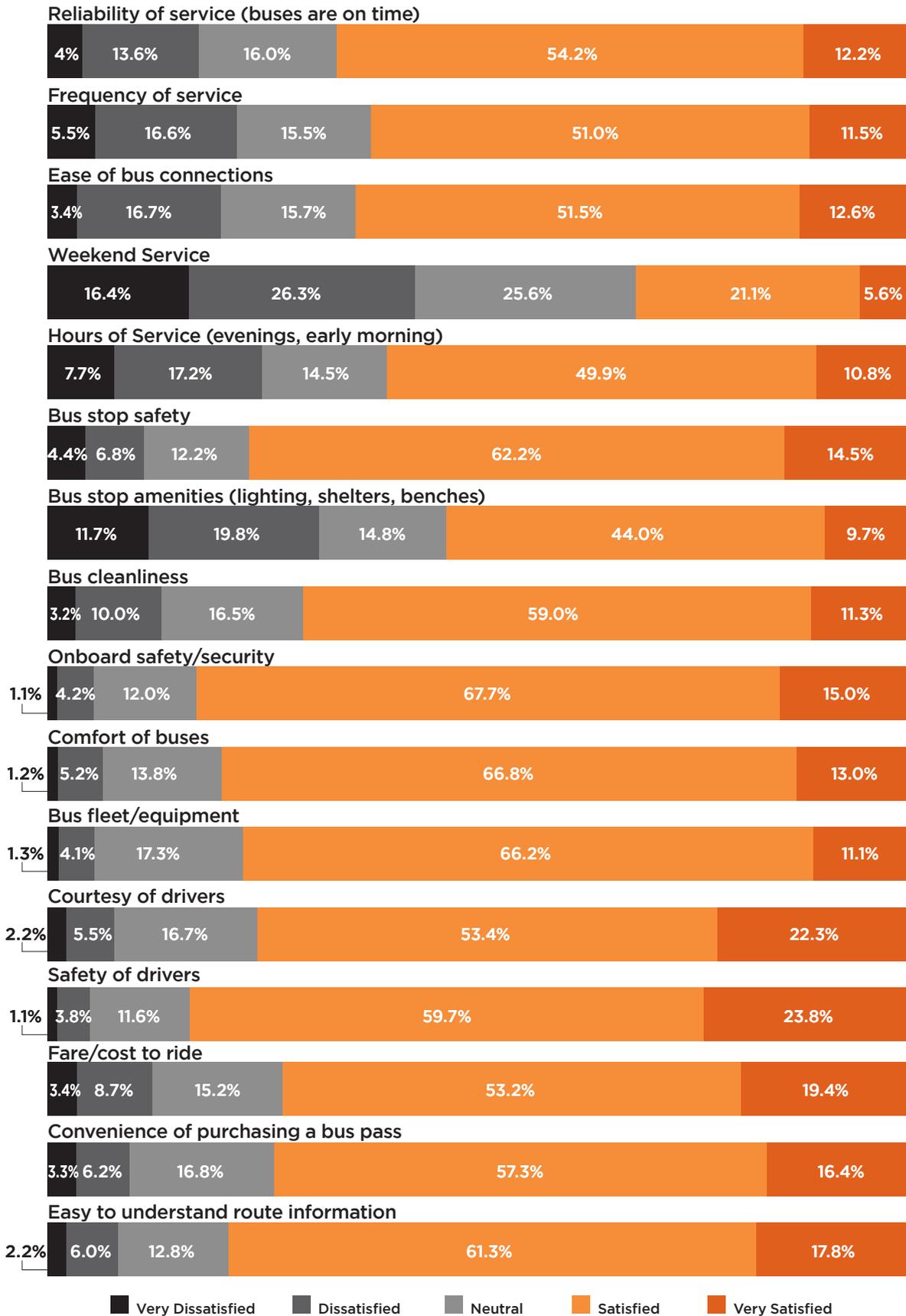
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## Satisfaction with GoRaleigh

Customer satisfaction questions were asked under one main question, 'rate your satisfaction with the following items', with multiple sub-questions that allowed respondents to provide a rating of, 'very satisfied', 'satisfied', 'neutral', 'dissatisfied', and 'very dissatisfied'. Responses from riders are shown in the chart on the next page. Safety of drivers (23.8%), courtesy of drivers (22.3%), and fare/cost to ride (19.4%) have the highest percentages of very satisfied riders. Across all aspects of service, the highest percentages of rider dissatisfaction exist with weekend service (26.3% dissatisfied and 16.4% very dissatisfied) and bus stop amenities (19.8% dissatisfied and 11.7% very dissatisfied).

# Customer Satisfaction



## Customer Perception

Three customer perception questions were phrased as statements and riders were asked to indicate their level of agreement as 'strongly disagree', 'disagree', 'neutral', 'agree', and 'strongly agree'. This information will help GoRaleigh better understand how riders view the GoRaleigh brand.

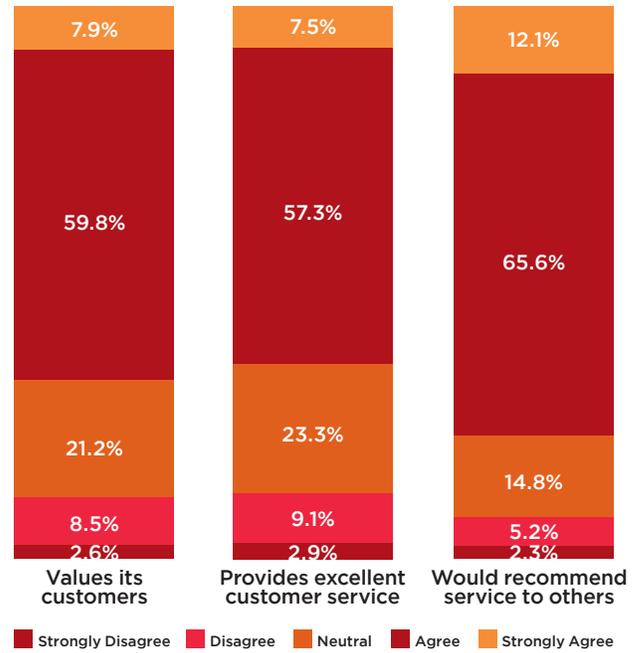
### Key Findings

- Most riders (65%-78%) agree or strongly agree that GoRaleigh values its customers, provides excellent customer service, and that they would recommend GoRaleigh to others.

**Riders were asked to respond to three questions to gauge their awareness of the new GoRaleigh brand.**

**These questions were:**

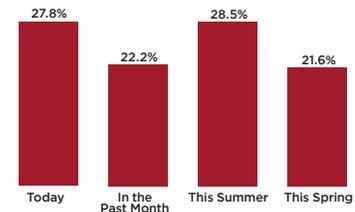
## Customer Perception of GoRaleigh



### 1. When did you learn CAT/Capital Area Transit changed to GoRaleigh?

#### Key Findings:

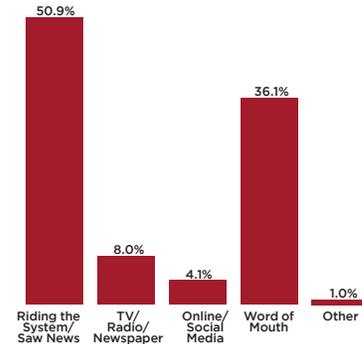
- The majority of GoRaleigh riders are aware that CAT/Capital Area Transit has changed to GoRaleigh (72.2%) before taking the survey.



### 2. How did you learn about the change from CAT to GoRaleigh?

#### Key Findings

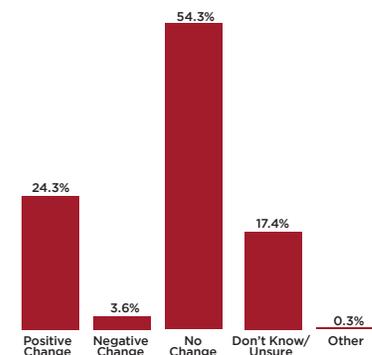
- The majority of riders learned about the transition from CAT to GoRaleigh by riding the system and/or seeing new buses (50.9%).



### 3. Have you noticed any differences in service since the switch from CAT/Capital Area Transit to GoRaleigh?

#### Key Findings

- The majority of GoRaleigh riders have not noticed any changes in service or were unsure if there were any changes in service (71.7%).
- Approximately one-quarter (24.3%) of GoRaleigh riders noticed positive changes and only a small portion noticed negative changes (3.6%).



# Analysis of Trends

When reviewing the response data, common trends and themes emerge that can provide a general assessment of how GoRaleigh’s fixed-route transit is used, who is using it, for what purpose, and how it is performing overall.

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## Trip Characteristics

The majority of GoRaleigh riders begin their trips at home and use the bus to get to work, or to get to their home once their trip concludes. Riders are also walking at a high rate to get to their buses, as well as their final destinations. These trends are also very similar to those reported in the 2010 Capital Area Bus Transit Development Plan (TDP) and show consistency in these characteristics over the last five years. While none of these trends may be surprising, they do reflect that GoRaleigh’s transit service is essential as a mode of transportation for riders to get to their jobs, as well as to other destinations, including their homes once their trip is done. The data reflects a large number of riders not having access to a vehicle and reaching their bus access point and final destination by walking. This data shows that transit is not only an important transportation alternative for those who have access to a vehicle, but it is a critical and accessible form of transportation for those who use it as their primary mode of transportation.



## Rider and Household Characteristics

The riders using GoRaleigh’s transit services are made up largely of 18-54 year olds, with overall use by those 55 and older, and under 18, making

up a small percentage of total riders. Riders most commonly live in two-person or one-person households, have no vehicle available to their household, and are primarily employed either full-time or part-time, or are students. Over half of GoRaleigh’s ridership is male, which slightly contrasts with the city of Raleigh’s gender profile, indicating that males are riding transit at a rate that is higher than their female counterparts. The majority of GoRaleigh riders identify as a racial/ethnic minority, which is similar to ridership demographics reported in the 2010 TDP. Ridership history also reflects a strong presence of veteran users (over 4 years), as well as semi-experienced riders using transit for the past 1-2 years and less than 1 year. Similar ridership history was reported in the 2010 TDP. GoRaleigh’s overall ridership has grown from an estimated 16,560 daily boardings in 2010 to an estimated 24,360 daily boardings in 2015.

Approximately two-thirds of GoRaleigh riders live in households that earn incomes within 150 percent of the federal poverty level, which indicates low-cost transportation is essential for their daily travel needs. This is similar to ridership earnings reported in the 2010 TDP.

## Customer Satisfaction and Perception of Agencies

Riders are satisfied with the reliability and frequency of service, the safety and courtesy of their drivers, and the comfort and safety of the buses. This reflects similar trends of the 2010 TDP, with the exception of reliability and frequency of service – an aspect that has achieved higher levels of ridership satisfaction. These findings indicate that GoRaleigh has made improvements based on ridership feedback in 2010. Any additional improvements that align with customer feedback provided in the Wake

County Transit Systems Customer Survey may increase satisfaction further.

There are a few aspects of service provision that provide an opportunity for improvement. There are higher levels of dissatisfaction among riders with amenities at bus stops and weekend service. Weekend service continues to be an area of dissatisfaction in 2015.

Transit remains a vital component to the everyday needs of Raleigh residents, and GoRaleigh continues

to provide quality service and reliability to its customers. A comparison of findings from 2010 to 2015 show that riders are still getting to their buses and final destinations by walking, and their trips are still to three major destinations of home, work, and school. Additionally, the racial makeup, income characteristics, and age of riders remains similar to the 2010 survey, as do the areas of customer satisfaction.

## Express Route Ridership

**Regional express routes operated by GoRaleigh for GoTriangle (WRX, KRX, ZWX, FRX, JCX, CLX, and 102 to Garner) were surveyed with GoRaleigh routes and results have been included with the GoRaleigh system results. While the regional express buses are a part of GoTriangle’s system and included with GoTriangle system maps and schedules, they are operated by GoRaleigh staff and vehicles carry the GoRaleigh branding. Regional express route riders constitute approximately 2.8 percent of GoRaleigh operated ridership (639 of 24,365 estimated daily boardings) and exhibit a blend of GoRaleigh and GoTriangle ridership characteristics.**

### Origins and Destinations

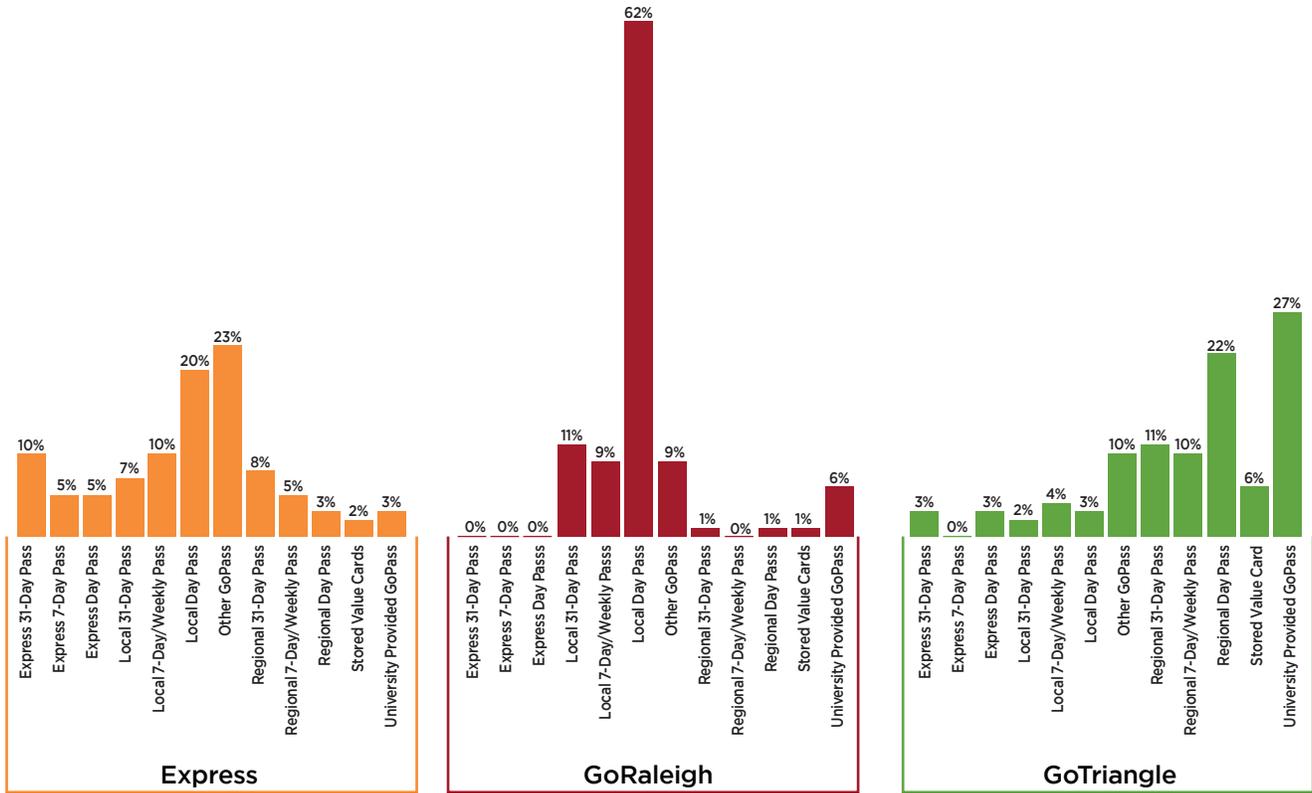
Express route riders had a higher frequency of work trips than GoRaleigh ridership, but a lower frequency of work trips than GoTriangle ridership. They made fewer medical, shopping, restaurant/dining, and airport trips than GoRaleigh or GoTriangle riders. Express route riders used an automobile to get to their first bus, or from their last bus to their ultimate destination, at a higher rate than GoRaleigh riders.

Trip Purpose Summary						
Trip Purpose	Express		GoRaleigh		GoTriangle	
	Total	Percent	Total	Percent	Total	Percent
Place of Employment	355	55.6%	9,056	38.2%	1,861	66.5%
College/University	108	17.0%	1,733	7.3%	296	10.6%
Social Visit	61	9.5%	2,703	11.4%	138	4.9%
Other Work Related	53	8.3%	1,545	6.5%	97	3.5%
School (K-12)	21	3.4%	448	1.9%	43	1.5%
Medical	11	1.8%	1,477	6.2%	86	3.1%
Other	11	1.7%	483	2.2%	27	1.0%
Shopping	9	1.4%	4,349	18.3%	85	3.0%
Recreation	8	1.3%	705	3.0%	22	0.8%
Restaurant/Dining	0	0.0%	1,169	4.9%	27	1.0%
Airport	0	0.0%	21,316	0.1%	116	4.2%

## Transit Pass and Fare Satisfaction

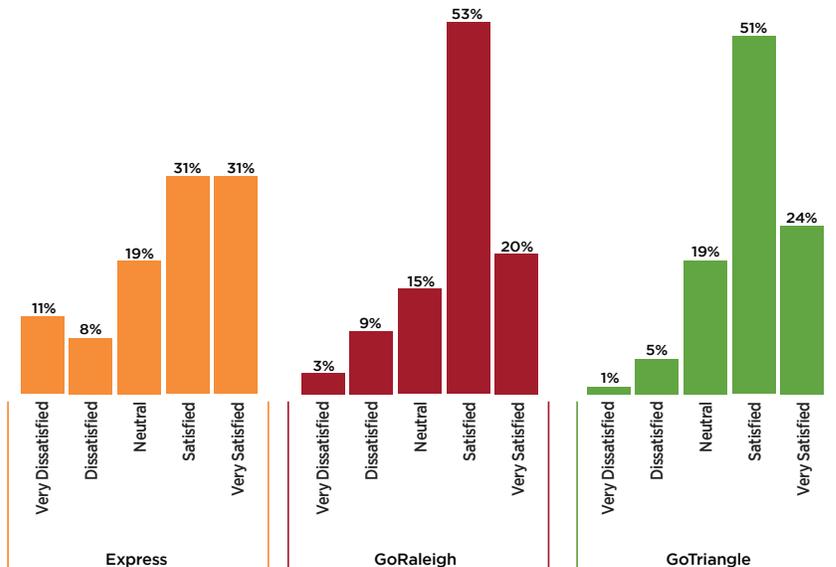
Express route riders use GoPasses at a higher rate (26%) than GoRaleigh riders (15%) and a lower rate than GoTriangle riders (37%). They use local day passes at a rate (20%) that is lower than GoRaleigh ridership (62%) and higher than GoTriangle ridership (3%).

### Comparison of Transit Pass Usage



Regional express route riders exhibit higher levels of dissatisfaction (8% dissatisfied and 11% very dissatisfied) with the fare/cost to ride when compared to GoRaleigh (9% dissatisfied and 3% very dissatisfied) and GoTriangle riders (5% dissatisfied and 1% very dissatisfied).

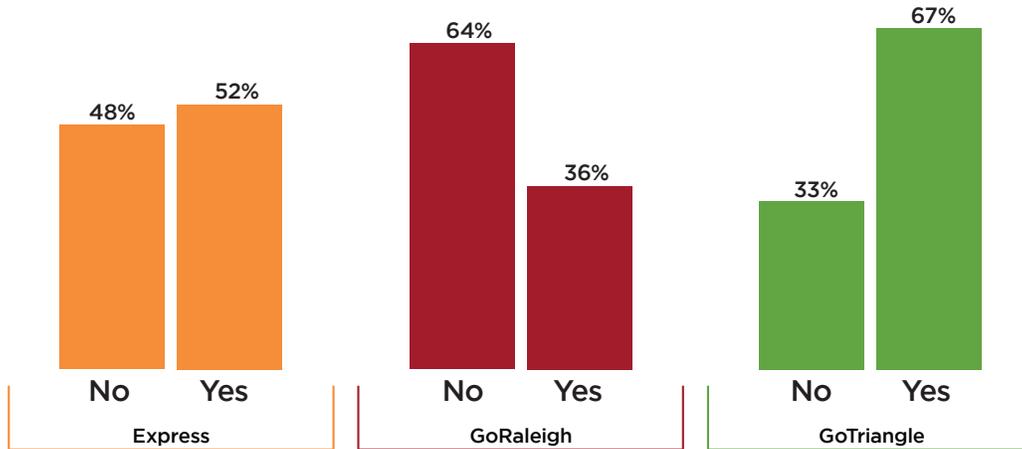
### Comparison of Fare Satisfaction



## Driver's License and Vehicle Availability

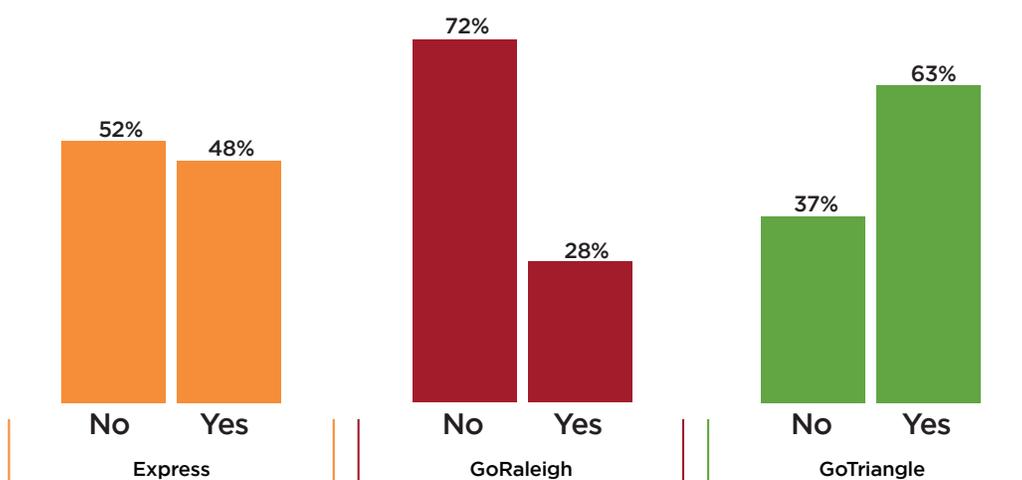
Regional express route riders have a higher rate of possessing a valid driver's license than GoRaleigh ridership (36%) and a lower rate of possessing a driver's license (51%) than GoTriangle ridership (67%).

Comparison of Driver's License Ownership



Regional express route riders also have vehicles available for their use at a rate (48%) that is higher than GoRaleigh ridership (28%), but lower than GoTriangle ridership (63%).

Comparison of Vehicle Availability for Use



## Race/ethnicity

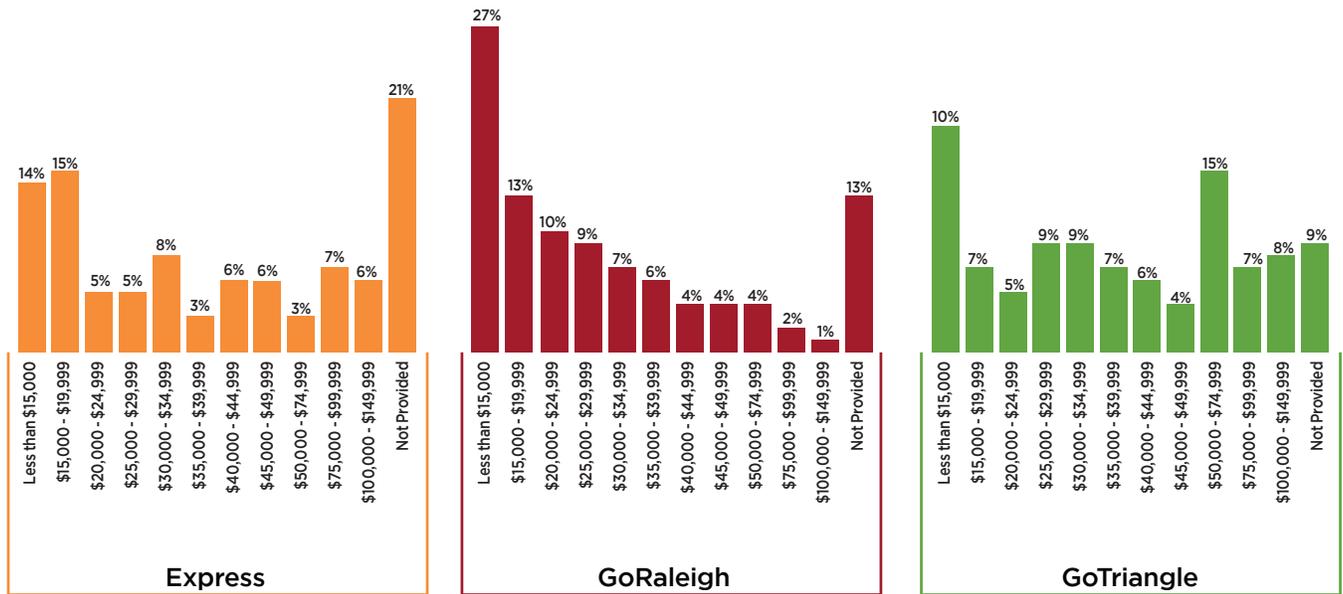
Regional express routes have a lower proportion of minority riders (71%) than GoRaleigh (78%), but a higher proportion than GoTriangle (50%).

Race/Ethnicity by Service Type			
Race/Ethnicity	Express	GoRaleigh	GoTriangle
White	29%	22%	50%
African-American	57%	64%	36%
Native American	0%	1%	1%
Hispanic-Latino	10%	10%	6%
Asian American	0%	1%	4%
Native Hawaiian Pacific Islander	0%	0%	0%
Other	3%	1%	3%

## Household Income (before taxes)

Regional express route ridership had a lower percentage of income earners in the range of less than \$15,000 annually (14%) than GoRaleigh ridership (27%) and a higher percentage than GoTriangle (10%). Additionally, regional express route ridership had a higher percentage of income earners in the \$100,000 - \$149,999 income range (6%) than GoRaleigh (1%) and a slightly lower percentage than GoTriangle (8%).

### Comparison of Household Income



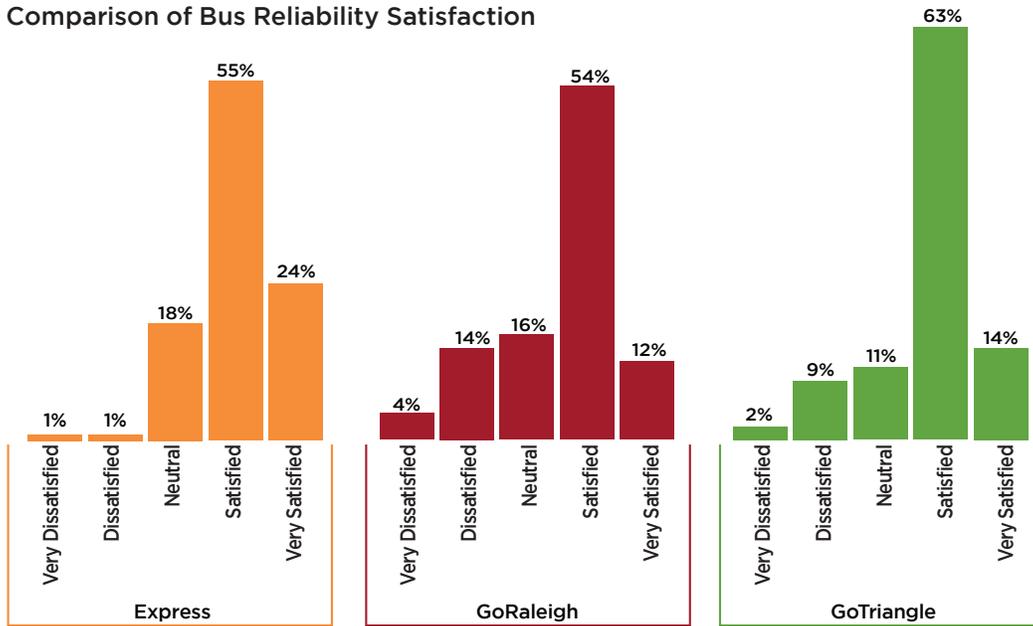
# Customer Satisfaction

Several key customer service aspects with results that exhibit differences for regional express routes are presented herein.

## Reliability of Service

Regional express route ridership exhibits lower rates of dissatisfaction (1% very dissatisfied and 1% very dissatisfied) with the reliability of bus service than GoRaleigh (14% dissatisfied and 4% very dissatisfied) or GoTriangle (9% dissatisfied and 2% very dissatisfied) ridership.

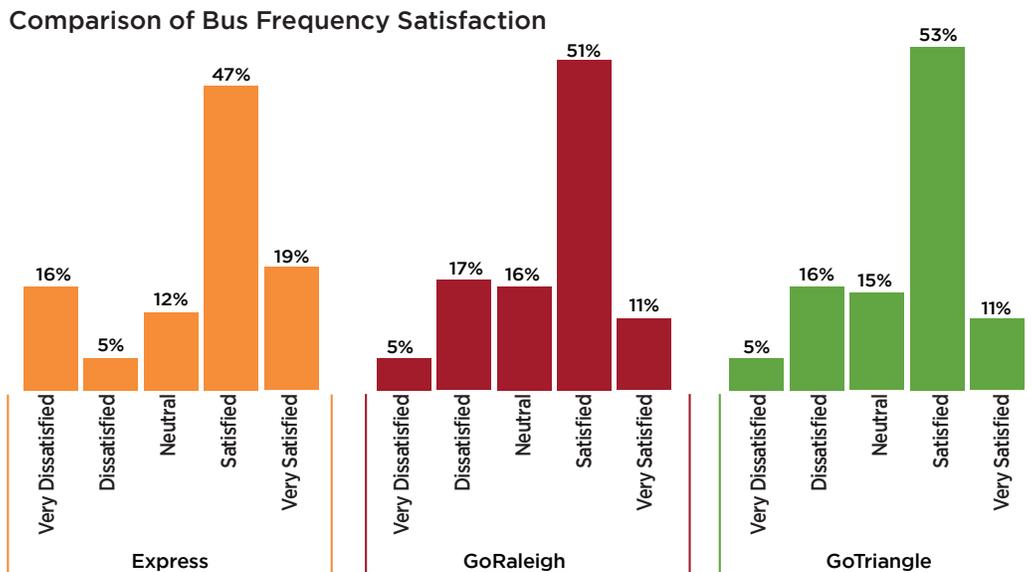
Comparison of Bus Reliability Satisfaction



## Frequency of Service

Regional express route riders exhibit higher rates of being very dissatisfied with frequency of service (16%) when compared to GoRaleigh (5%) and GoTriangle (5%) riders. However, overall dissatisfaction levels (dissatisfied and very dissatisfied) are similar for regional express, GoRaleigh, and GoTriangle ridership.

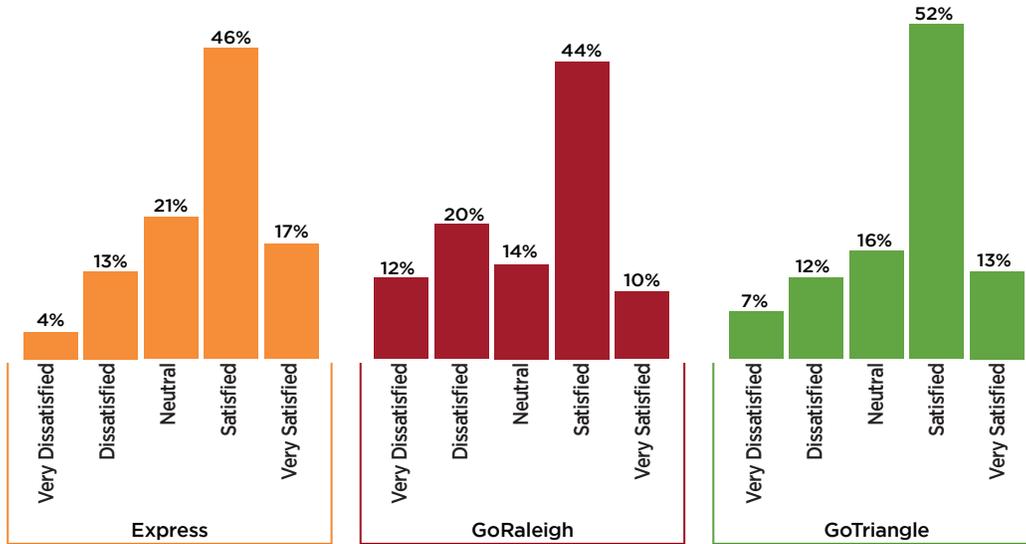
Comparison of Bus Frequency Satisfaction



## Bus Stop Amenities (Lighting, Shelters, Benches)

Regional express route riders have lower rates of dissatisfaction (13% dissatisfied and 4% very dissatisfied) than GoRaleigh (20% dissatisfied and 12% very dissatisfied) and similar rates of dissatisfaction with GoTriangle (12% dissatisfied and 7% very dissatisfied) riders.

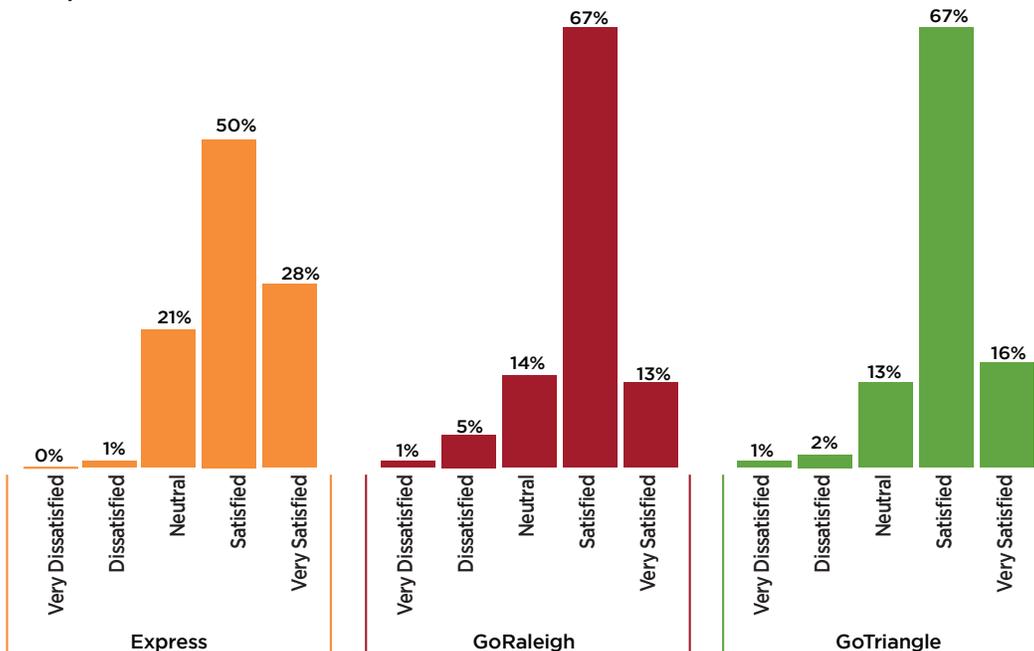
Comparison of Bus Stop Amenities Satisfaction



## Comfort of Buses

Regional express route riders have higher rates of being very satisfied with the comfort of buses (28%) than GoRaleigh (13%) or GoTriangle (16%) riders. However, overall rates of satisfaction (satisfied and very satisfied) are similar among regional express, GoRaleigh, and GoTriangle ridership.

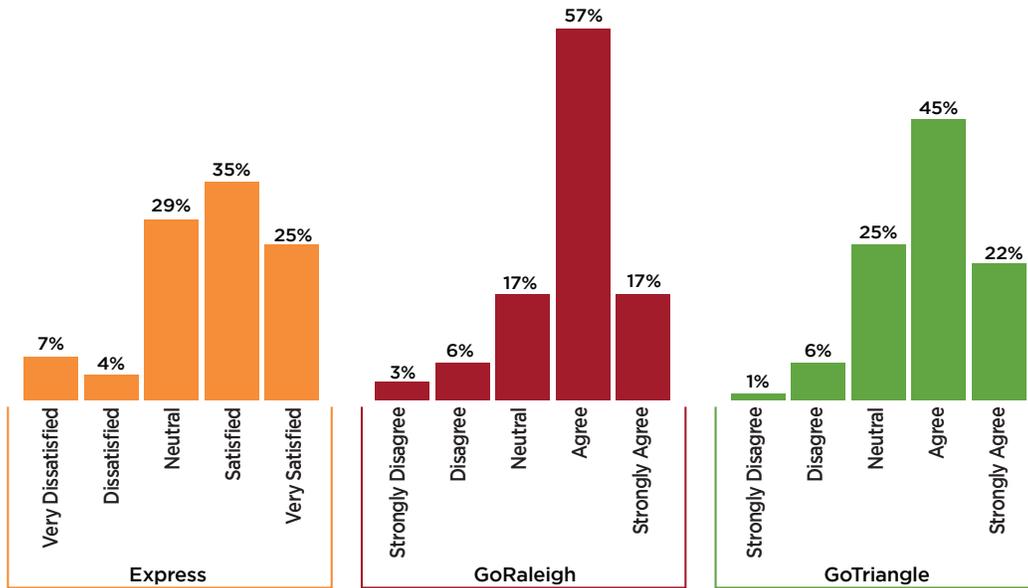
Comparison of Bus Comfort Satisfaction



## Convenience of Purchasing a Bus Pass

Regional express route riders exhibit higher rates of being very dissatisfied (7%) with the convenience of purchasing a bus pass than GoRaleigh (3%) or GoTriangle (1%) riders. However, overall levels of dissatisfaction (dissatisfied and very dissatisfied) are only slightly higher for regional express ridership when compared to GoRaleigh or GoTriangle ridership.

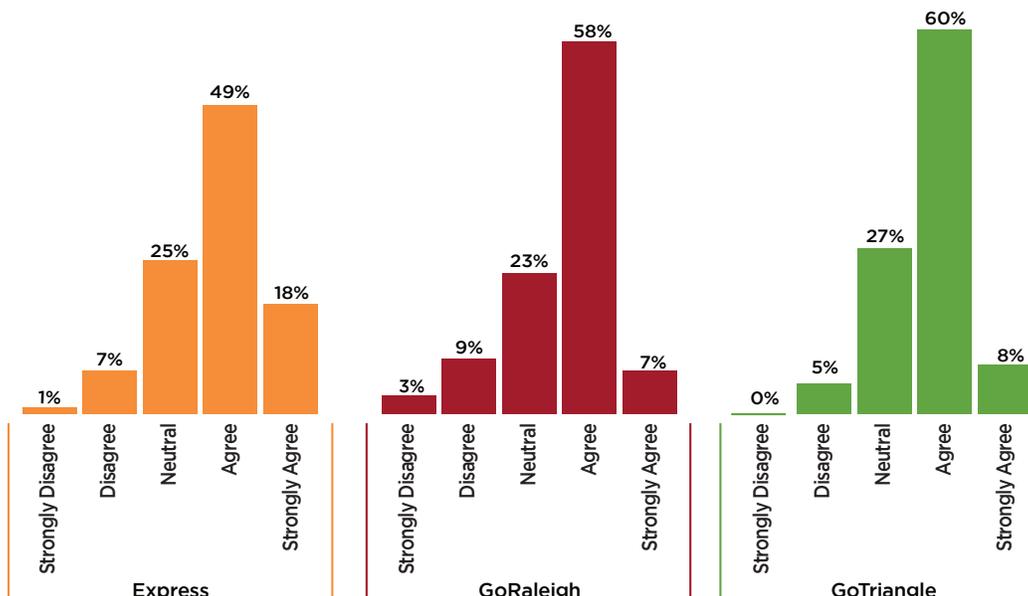
Comparison of Bus Pass Purchase Satisfaction



## Overall Customer Service Perception

Express route ridership exhibits similar overall levels of agreement (agree and strongly agree) regarding the perception of excellent customer service provision as GoRaleigh and GoTriangle ridership. However, regional express route ridership exhibits a higher level of strongly agreeing (18%) with the perception that customer service provision is excellent than GoRaleigh (7%) or GoTriangle (8%) ridership.

Comparison of Overall Customer Service Perception



## Conclusion

The Wake County Transit Systems Customer Survey was conducted in the fall of 2015 in an effort for GoRaleigh to gain insight into the trip profiles of its riders, demographic characteristics of its riders, and how its systems are performing. By understanding the characteristics of its riders, and their trips, GoRaleigh can make informed decisions that will continue to enhance its delivery of transit service to Raleigh's residents.

The survey results will also play a critical role in coordination among the transit agencies in the region, in developing an update to the regional transit model. This update will help provide the framework for future transportation planning initiatives for Raleigh and the surrounding region. The data collected from this survey will be an important factor in understanding how transit is operating currently and what will be needed moving forward.

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