

# *2020 Customer Survey Findings*

Presented to

# RideKC

By



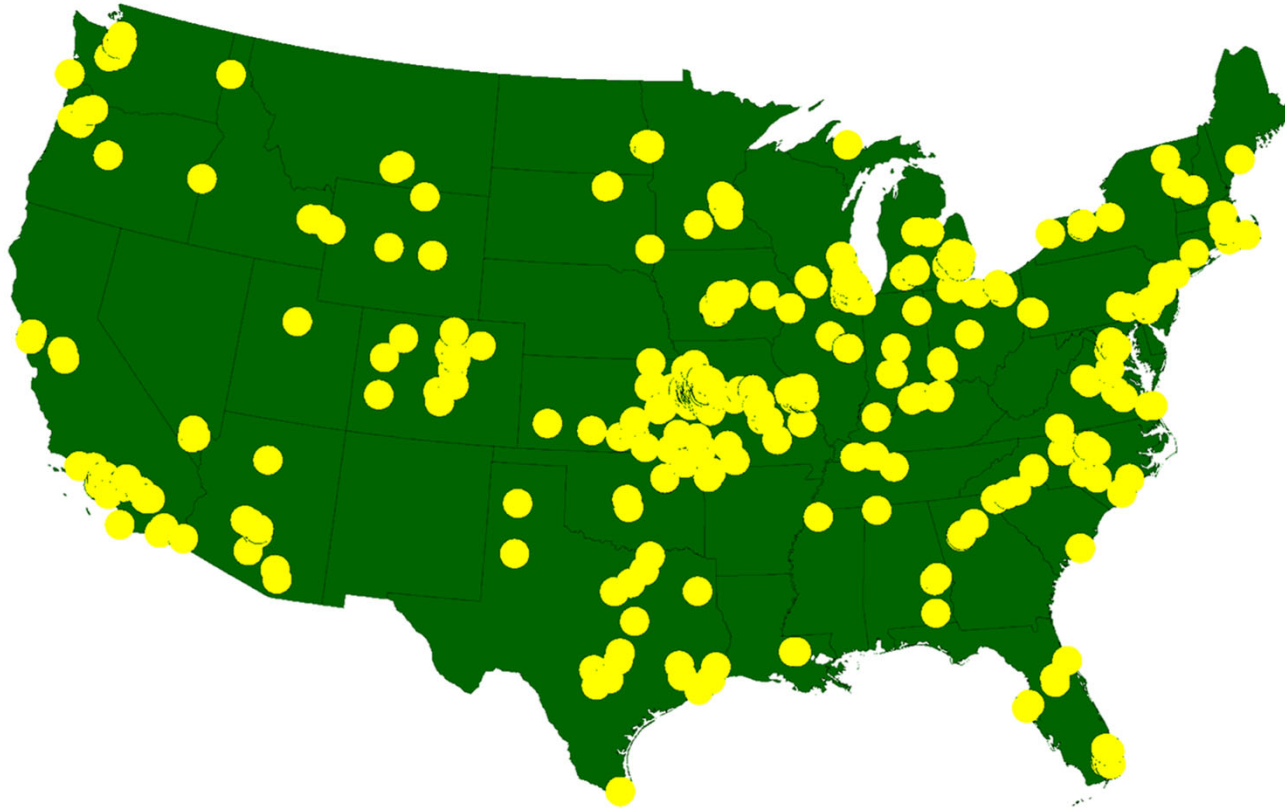
# HNTB

January 27, 2021



# **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!

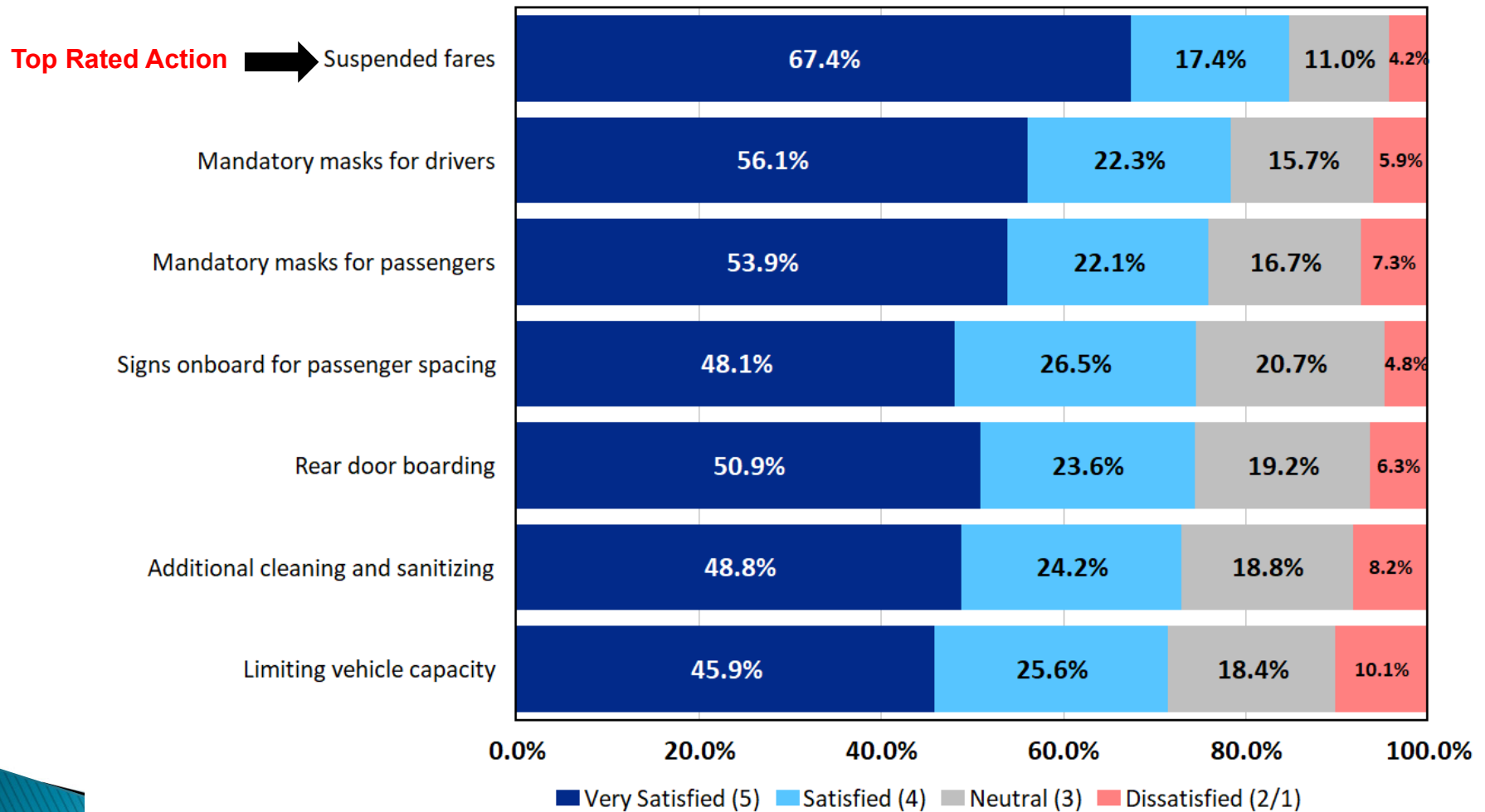


## Findings from the Rider Survey

**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")



**Riders Gave Posting Ratings in All Areas**



# 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

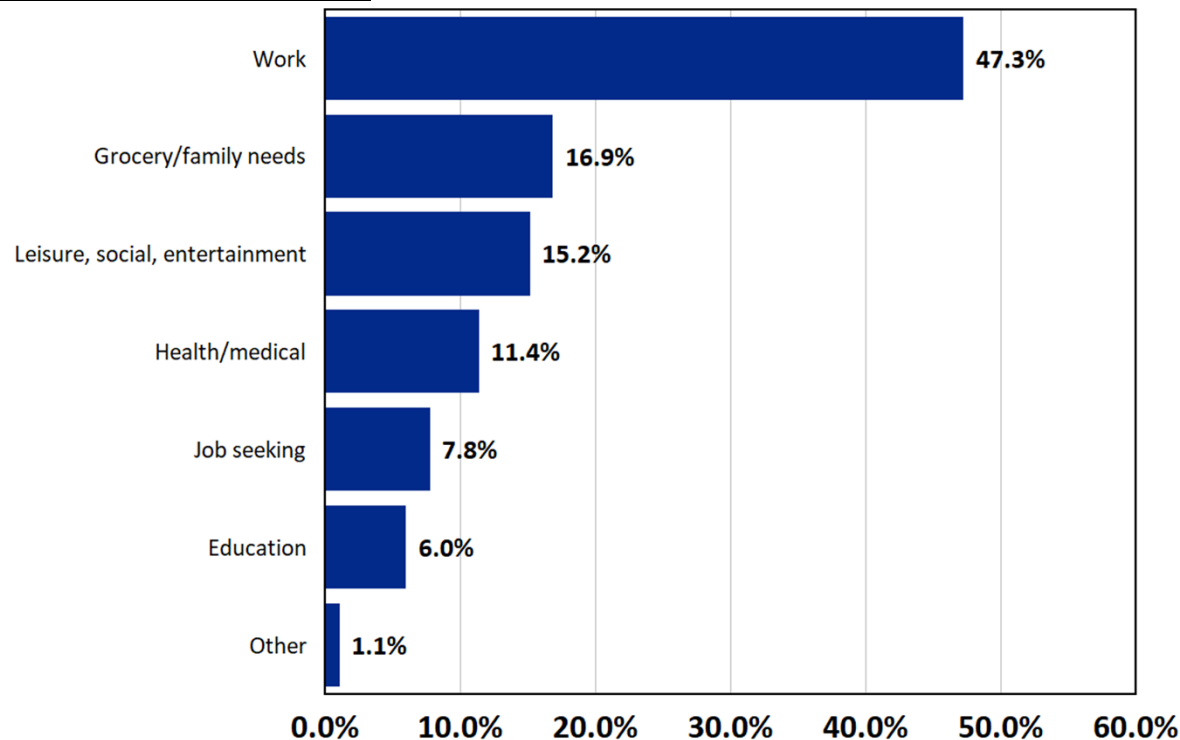
**RideKC made it possible for thousands of essential workers to get to/from work during the COVID-19 Pandemic**

# *The Top Reason Riders Have Been Using RideKC During the Pandemic Has Been to Get to Work*

## **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)

### **Bus/MAX Riders**



Source: ETC Institute (2020)

***Top Two Reasons for Using RideKC by Type of Service***

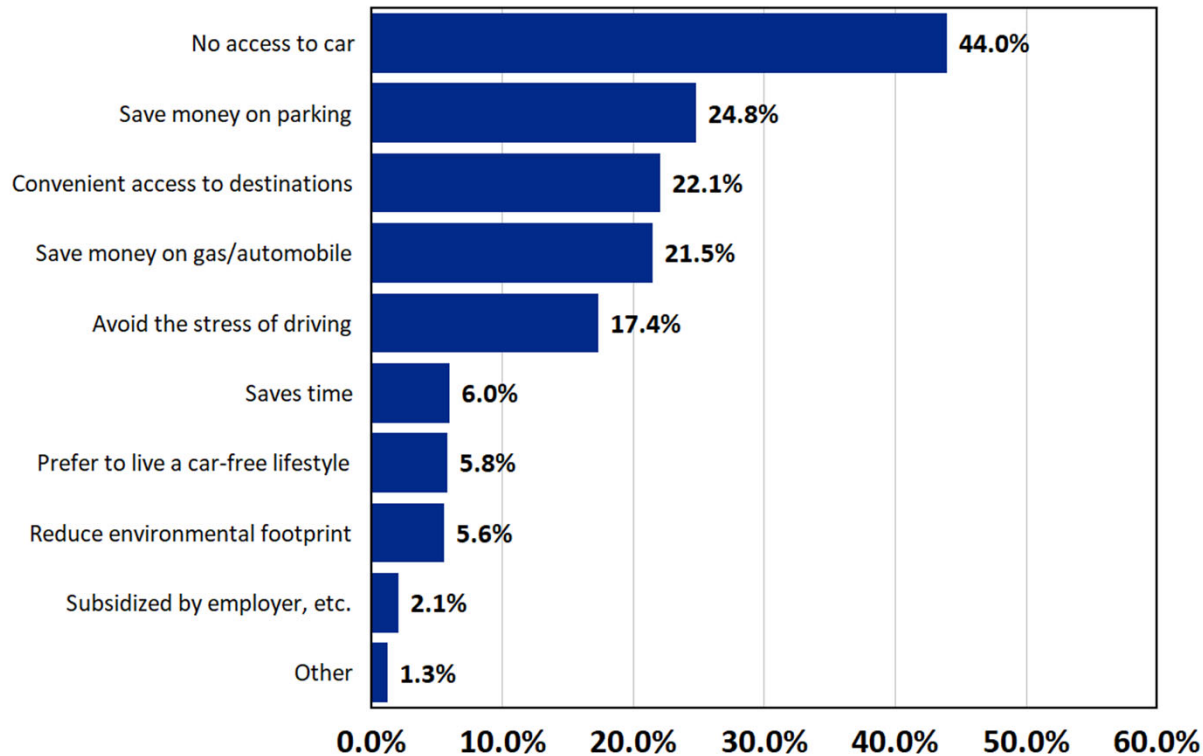
**Flex**  
**56% Work**  
**16% Grocery**

**Micro Transit**  
**51% Work**  
**38% Grocery**

# Many Riders Do Not Have Other Alternatives for Getting to Work

## Q32. Main Reasons for Using Transit

by percentage of respondents (multiple selections could be made)



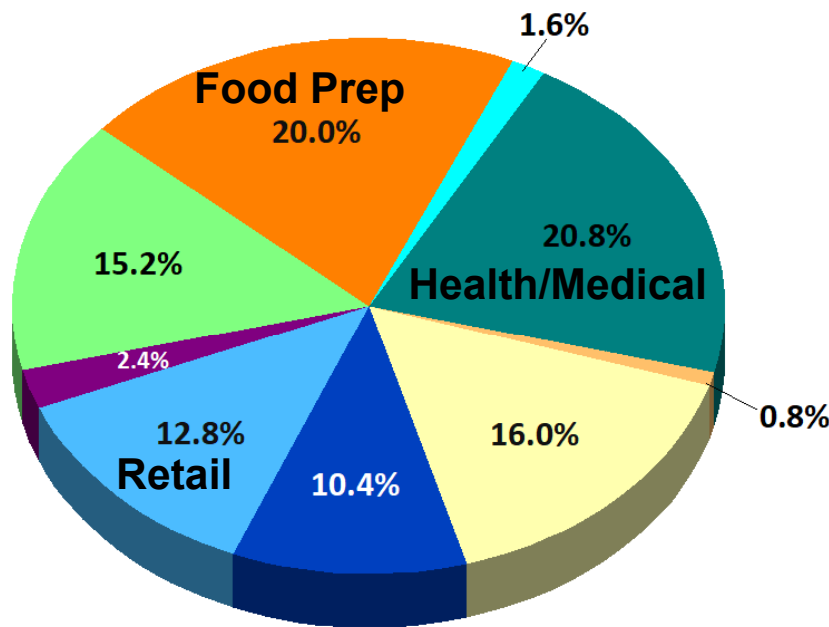
***Without RideKC, thousands of people would not have been able to get to work during the Pandemic***

Source: ETC Institute (2020)

# *RideKC Has Been Making It Possible for “Essential Workers” to Get to Work During the Pandemic*

## **Q14a. Industry in Which Respondents Work**

by percentage of respondents who continued to take transit to/from work



- Health care/medical related
- Emergency services
- Food preparation/serving
- Government/community services
- Construction
- Retail/sales
- Business/office
- Other
- Not provided

***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**

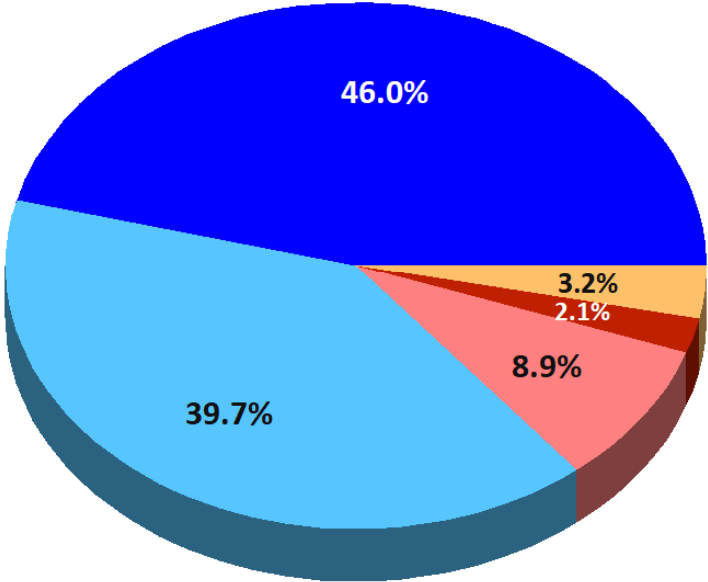


# Overall Satisfaction Is Very High

## Q27. Overall Satisfaction with RideKC Experience

by percentage of respondents

### Bus/MAX Riders



Very satisfied Somewhat satisfied Somewhat dissatisfied Very dissatisfied Not provided

**Satisfaction Is High for All Services**

**86% of Bus/MAX Riders**

**97% of Flex Riders**

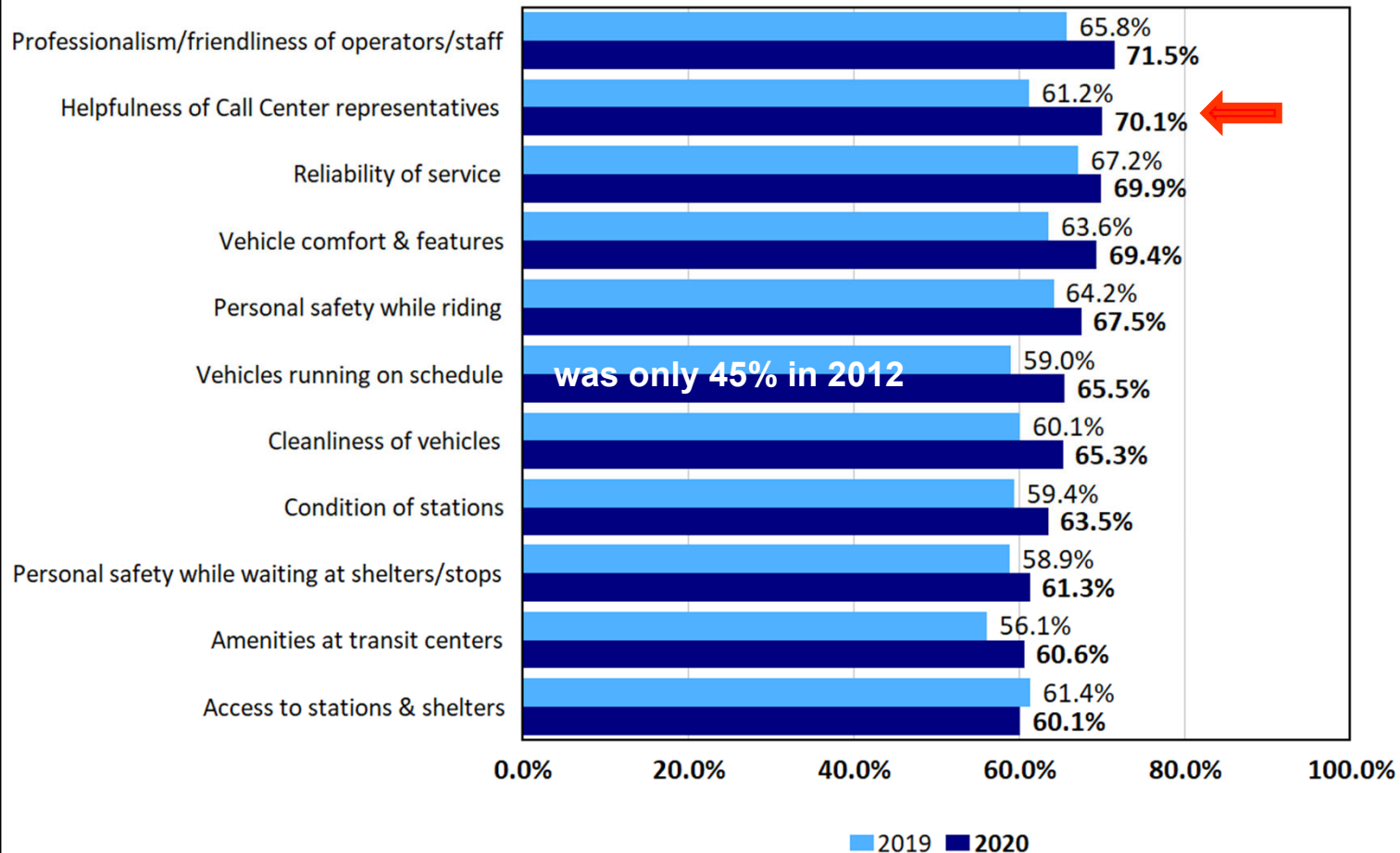
**96% of Micro Transit Users**

Source: ETC Institute (2020)

# Satisfaction Increased in Most Areas

## Satisfaction with Various Elements of RideKC's Performance

by percentage of respondents who rated the item as a 4 or 5 on a 5-point scale, with 5 meaning "very satisfied" and 4 meaning "satisfied" (excluding "not provided")



The biggest increase was with the "Helpfulness of Call Center Representatives" which was up +9% from 2019.

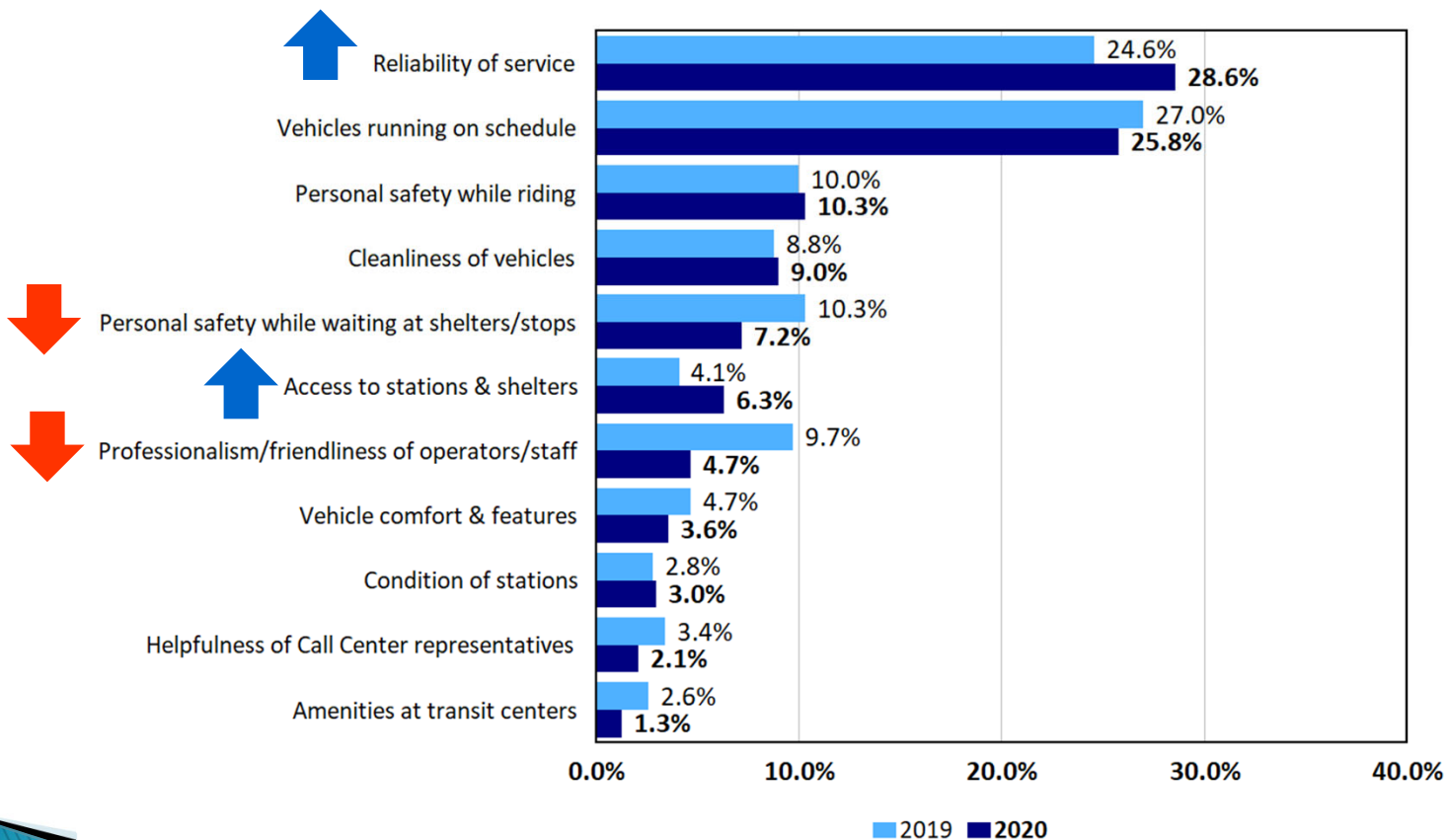
## Findings from the Rider Survey

**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



More important in 2020

Less important in 2020

# Best Ways to Enhance Satisfaction and Retain Existing Customers

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

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.