2012 Metrolink Customer Satisfaction Survey and Metrolink Market Study Results



Overview

Two surveys were conducted for Orange County:

- Metrolink Customer Satisfaction Survey
 - Onboard survey
 - Measure customer satisfaction
 - Identify desired service improvements
 - Explore opportunities to increase frequency of ridership

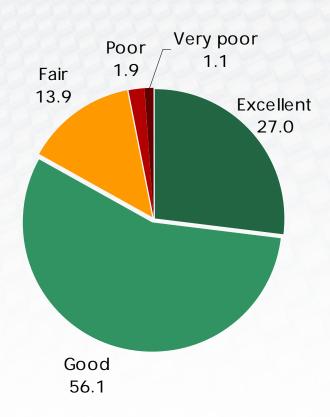
Metrolink Market Study

- Telephone/online survey
- Measure awareness and perceptions of Metrolink
- Identify perceived barriers to riding Metrolink
- Profile potential markets for increasing ridership

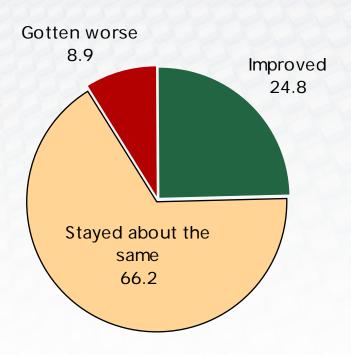
Metrolink Customer Satisfaction Survey Key Findings



Customer Satisfaction

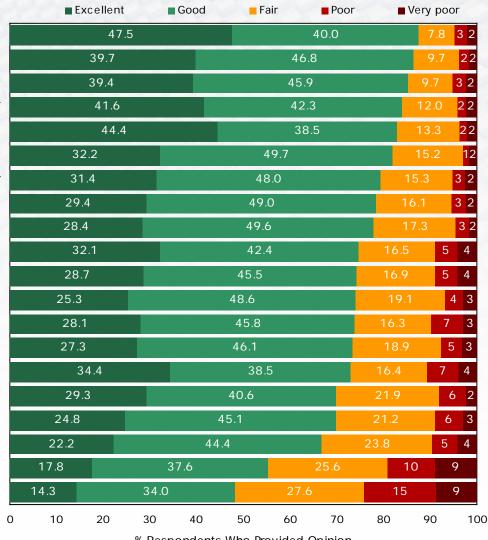


Quality of Service Over Time



Rating of Metrolink Performance

Availability of parking at stations Sense of personal safety at station and on trains Security of your car while parked at station Helpfulness and courtesy of METROLINK conductors/train staff Value of riding METROLINK compared to driving Overall convenience of using METROLINK Cleanliness of train interior Availability of seating on train Overall comfort of using METROLINK Helpfulness and courtesy of METROLINK staff at stations/on phone Availability of connecting transit buses at station Freedom from nuisance behavior from other riders Availability of train schedule information and updates Availability and convenience of transfers between METROLINK trains Ease of purchasing METROLINK tickets from ticket vending machines Travel time on METROLINK compared to driving Reliability of trains running on schedule Enforcement of Rules of Conduct among riders METROLINK's responsiveness to customer concerns Availability of train delay information



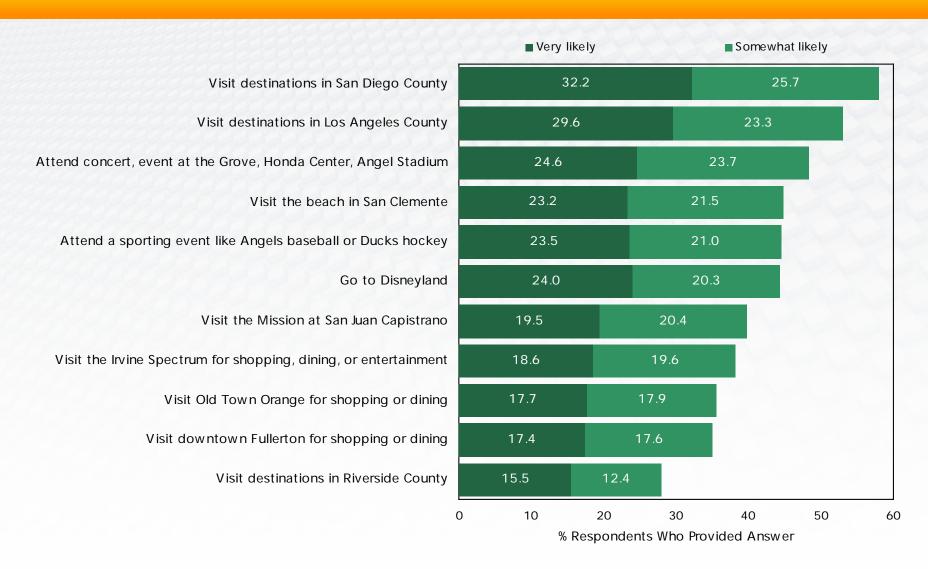
Obstacles to Increasing Ridership

36.9 Trains don't run frequently enough on weekends Trains don't run frequently enough on weekdays 36.7 The price of tickets 35.1 Train service ends before 7 P.M. on weekends 31.5 26.1 Service for many stations ends before 10 P.M. on weekdays Train service doesn't begin until 9 A.M. on weekends 22.5 Difficulty connecting from station to ultimate destination 19.1 15.4 Layover when switching trains, transferring to other transit Difficulty getting from your home to a METROLINK station 12.4 Train service doesn't begin until 4 A.M. on weekdays 11.5 10 20 0 30

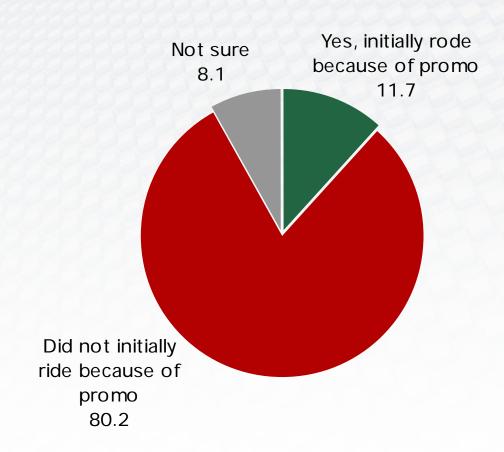
40

% Respondents Who Provided Answer

Likelihood Using Metrolink to ...



Promotions and Ridership



Two Categories of Customers

Experienced Riders	Occasional Riders
Riding for 1+ years	Ride for less than 1 year
Ride 4+ days per week	Ride 2 or fewer days per week
Work-related trips	Mix of work, visiting, and entertainment trips
Pass holders	Ticket users
More likely to drive solo to access transit	Less likely to drive solo to access transit

Customer Profile

Gender

- 54% Males
- 42% Females

Ethnicity

- 49% Caucasian
- 18% Asian American
- 17% Hispanic
- 7% African American

Age

- 52% Between ages 25 and 54
- 20% Over age 54
- 11% Under age 25

Employment Status

- 68% Full time employees
- 8% Part time employees
- 9% Students
- 7% Retired or homemakers

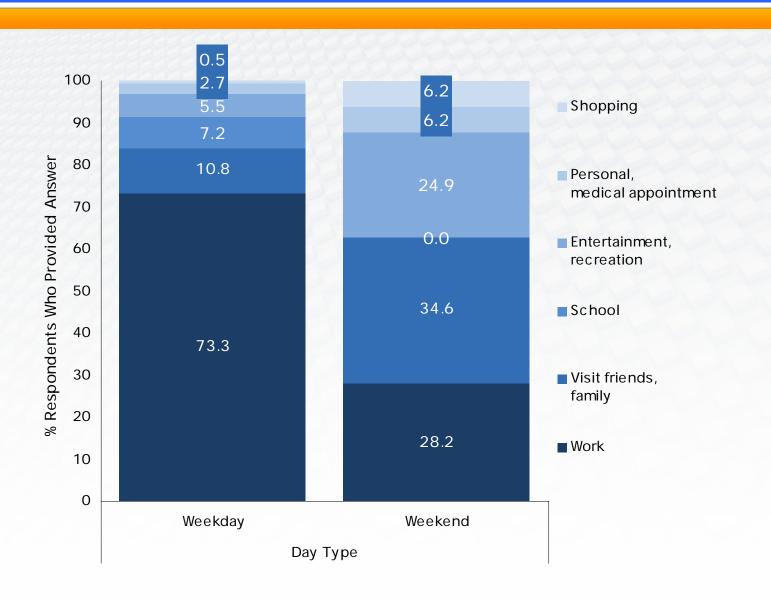
Annual Household Income

- 34% Between \$40K \$99K
- 23% Less than \$40K
- 22% Between \$100K \$200K
- 7% Over \$200K

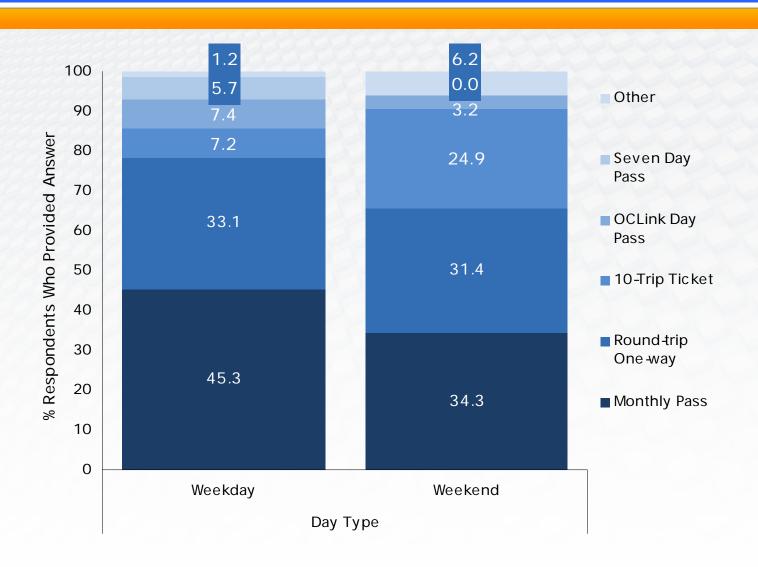
Access to Personal Vehicle

- 71% Always
- 13% Sometimes
- 11% Rarely/Never

Purpose of Current Trip



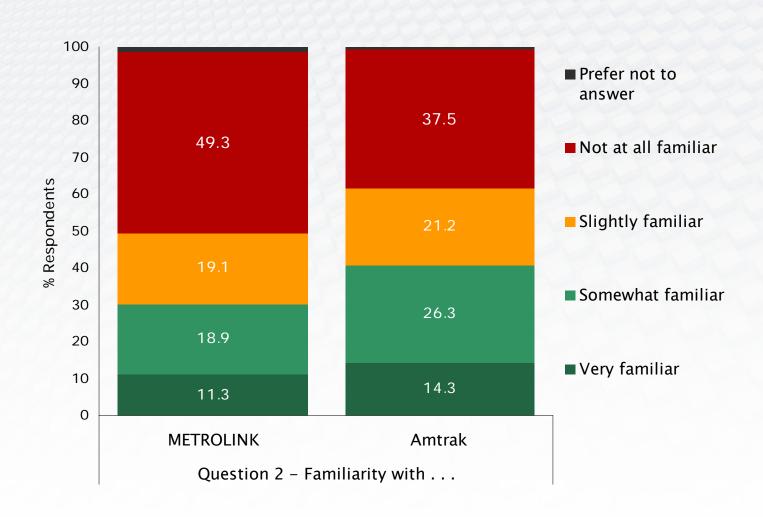
Fare Type for Current Trip



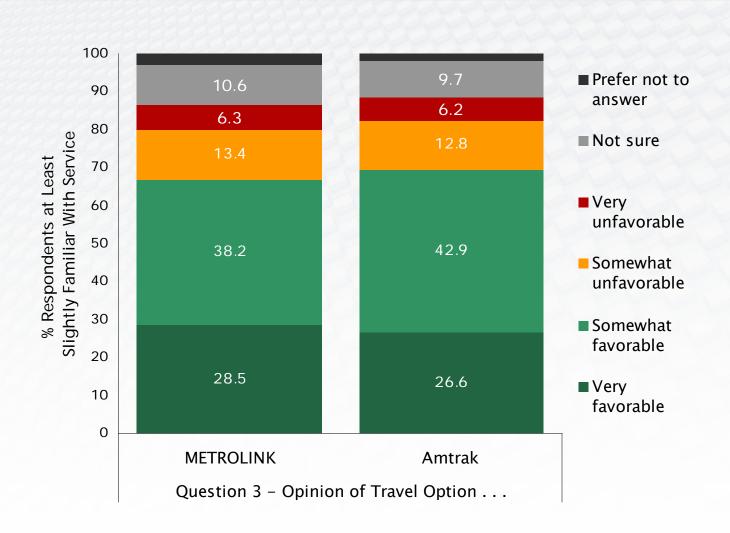
Metrolink Market Study Key Findings



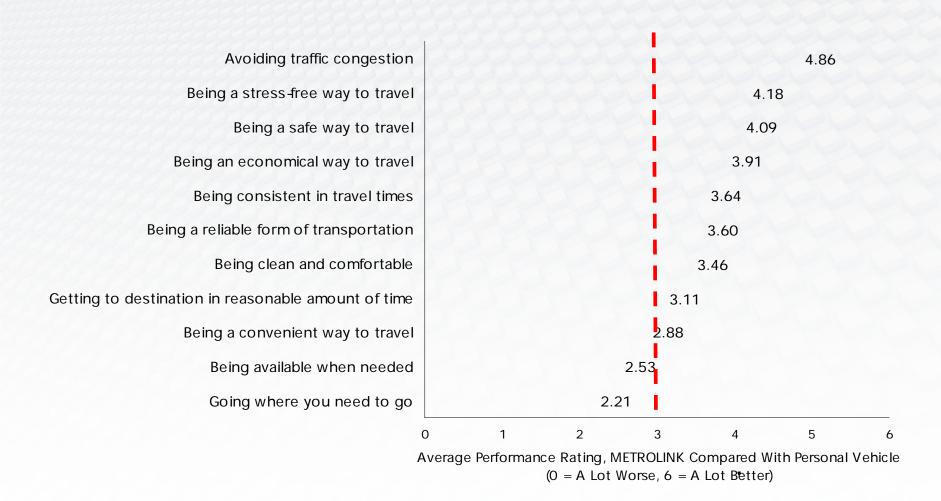
Familiarity with Metrolink



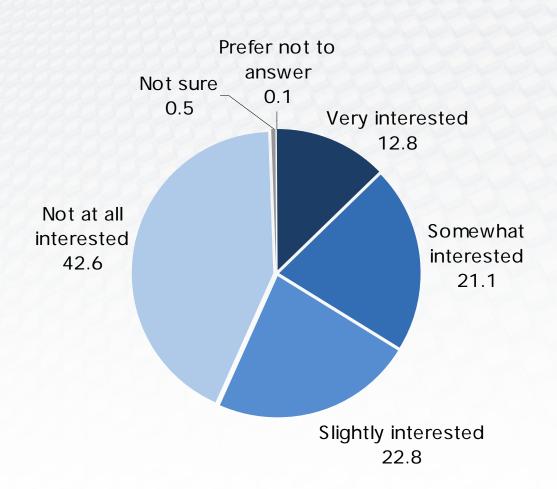
Opinion of Metrolink as Travel Option



Metrolink vs. Personal Vehicle



Interest in Riding Metrolink



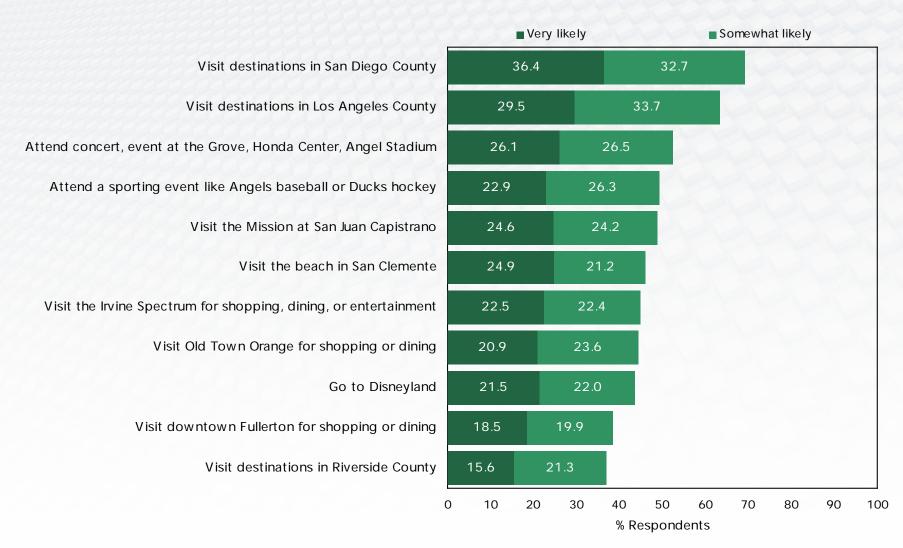
Obstacles to Riding Metrolink

Difficulty connecting from station to ultimate destination 50.7 38.9 Difficulty getting from your home to a METROLINK station Train service ends before 7 P.M. on weekends 38.3 Layover when switching trains, transferring to other transit 35.5 Trains don't run frequently enough on weekends 32.5 29.8 Service for many stations ends before 10 P.M. on weekdays 28.7 Train service doesn't begin until 9 A.M. on weekends Trains don't run frequently enough on weekdays 28.0 The price of tickets 25.5 Train service doesn't begin until 4 A.M. on weekdays 19.1 0 30 10 20 40 50

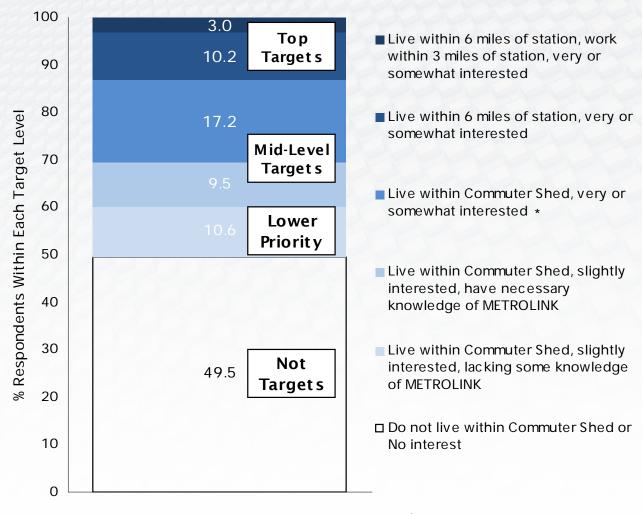
60

% Respondents

Likelihood of Using Metrolink

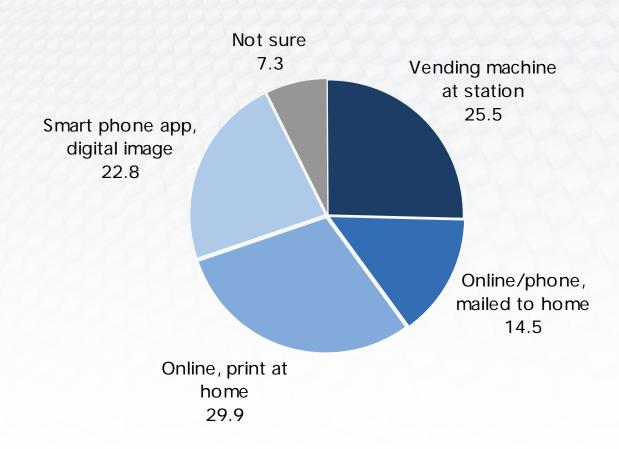


Potential Metrolink Market



^{*} Commuter Shed refers to a geographic area in which the bulk of Metrolink transit riders reside

Fare Media Purchasing Preferences



Movt Stone

Mext Steps	
Area	Recommended Actions
Weekend Service	 Promote new weekend service that is effective July 2012, monitor ridership
Weekday Service (Later Evening)	 Continue to evaluate Metrolink Service Expansion Program and make adjustments to build ridership
Special Event Service	• Primary markets are services to events at the Honda Center,

• Further define demand, schedules, and cost

Develop run-through trains to San Diego

Continue to assess Station Link bus service

Improve availability of train delay information

Research smart phone ticketing options

Explore real-time customer information systems

Develop targeted marketing plans to stimulate trial and build

Consider trip purpose, demographics, and origin/destinations

Expand destination partnerships and promotions, i.e. Coaster,

North County Transit District, Disney, Los Angeles destinations, etc.

23

Implement a bike share pilot program

Implement station van program

frequency of use

The Grove, Angel Stadium

Service to San Diego County

(Orange County)

First and Last Mile

Targeted Marketing

Destination Partnerships

(Weekend and Off-peak)

Train Delay Information

(Connections)

Ticketing