October 13, 2023

We Make Lives Better
Through Connections.

2023 Community and Customer Survey Results

Leah Riley
Chief Administrative Officer

Overview

- **Introduction**
- **Customer Excellence Survey**
  - Customer Characteristics
  - Overall Customer Satisfaction
  - Net Promoter Score
  - National Average Comparison
  - Top Importance and Key Driver Analysis
  - Notable Changes
- **Community Value Survey**
  - Net Promoter Score
  - National Average Comparison
  - Top Importance Key Driver Analysis
- **Stakeholder Survey**
- **Conclusion**

Key Takeaways

- Overall satisfaction increased
- Satisfaction ratings are above the national average in all areas
- Net Promoter Score declined in all modes except commuter rail
- Frequency of service, fare price, and travel time remain highly important to customers
- Access to employment, affordable options, and reducing traffic congestion have highest community importance
- Community members and key business stakeholders see RTD's value to the Denver metro area

Introduction

Six Surveys

Bus

Rail (Commuter Rail and Light Rail)

Access-a-Ride (Paratransit)

Access-on-Demand (Paratransit)

Community

Stakeholder

Customer Excellence Survey

Methodology: Bus and Rail Surveys

- Intercept method
- Survey period: September 11 through 24, 2023
- Target sample: 1,200 (+/- 2.8% at the 95% confidence level)
- 1,288 completed surveys
- Every route/line sampled in proportion to Spring 2023 ridership

Methodology: Paratransit Surveys

- Distribution: mail, email and text message
- Survey period: September 9 to September 29, 2023
- Target sample: 400 (+/- 4.9% at the 95% confidence level)
- 528 completed surveys

Customer Characteristics

Customer Characteristics

- Most likely to be male and 18-39 years old
- 40% White or Caucasian
- 25% Hispanic, Spanish, or Latino/a/x
- 22% Black/African American
- 61% reported household incomes of less than $50,000

- Most likely to be male and 18-39 years old
- 47% White or Caucasian
- 21% Hispanic, Spanish, or Latino/a/x
- 17% Black/African American
- 48% reported household incomes of less than $50,000

- Most likely to be female and over 65 years old
- 64% White or Caucasian
- 16% Black/African American
- 15% Hispanic, Spanish, or Latino/a/x
- 70% reported household incomes of less than $25,000

Customer Characteristics (cont'd)

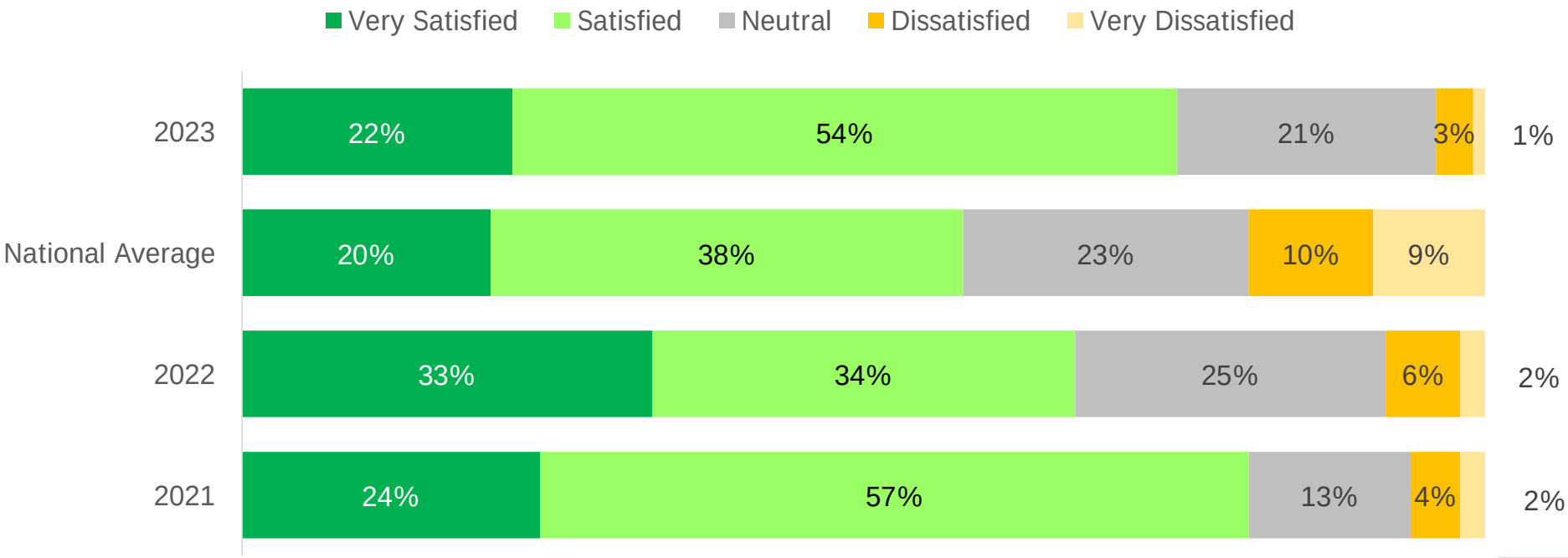
- 71% use the bus three or more days a week
- 74% are reliant on bus service
- 56% use buses to commute to and from work

- 56% use rail three or more days a week
- 67% are reliant on rail services
- 46% uses trains to commute to and from work

- 49% use AOD for making most of their trips
- 27% use AAR for most of their trips
- 47% use services for medical appointments

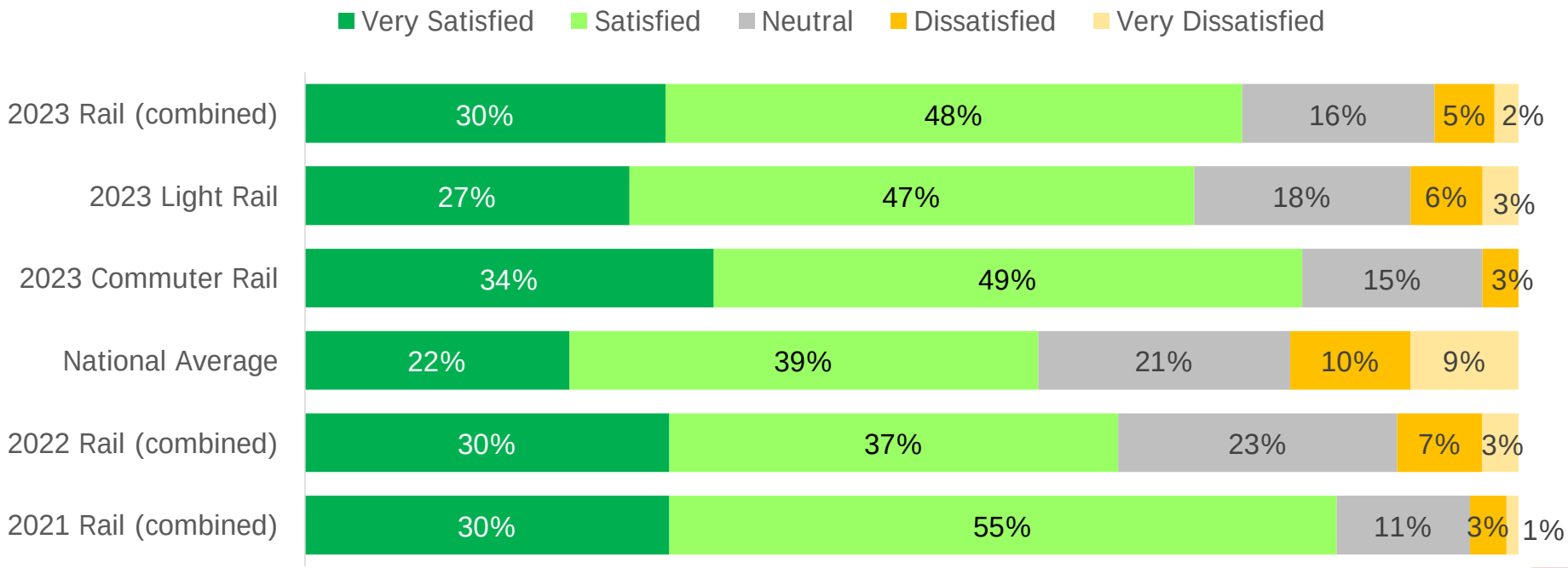
Overall Customer Satisfaction

Overall Satisfaction: Bus



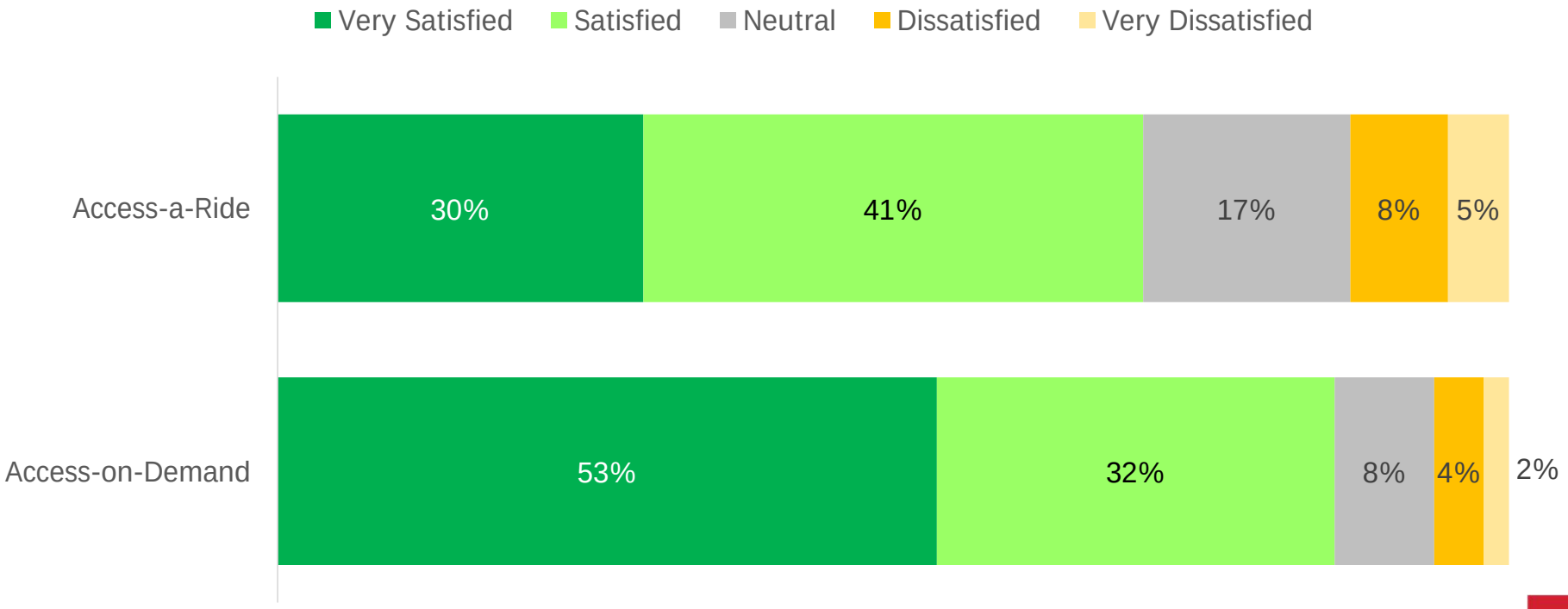
Percentages do not equal 100 due to rounding.

Overall Satisfaction: Rail



Percentages do not equal 100 due to rounding.

Overall Satisfaction: Paratransit*



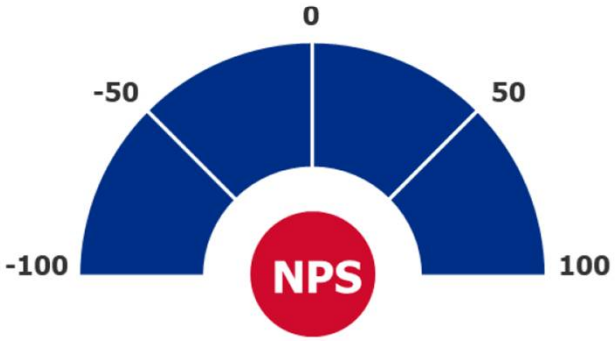
*National comparative data not available

Percentages do not equal 100 due to rounding.

Net Promoter Score

Net Promoter Score

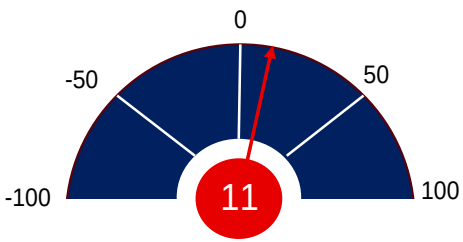
How likely are you to recommend RTD to a friend or neighbor?



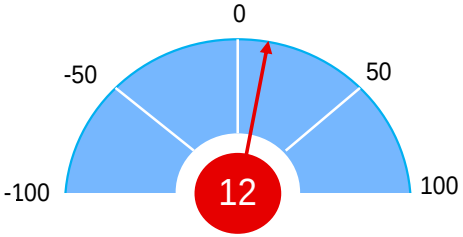
- 0-20 is good
- 20-50 is favorable
- 50-80 is excellent
- 80-100 is world class

Customer NPS – Bus, Rail and Paratransit Combined

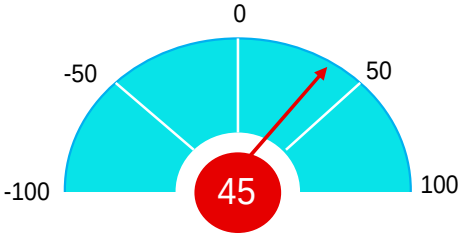
2023*



2022

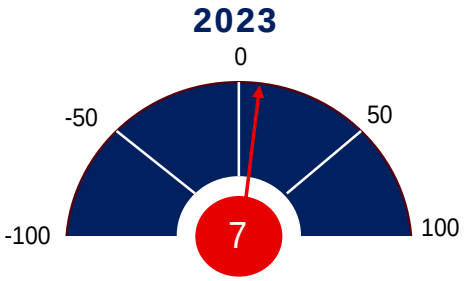


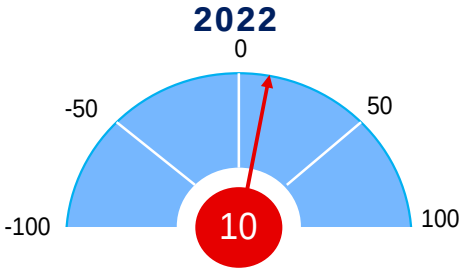
2021

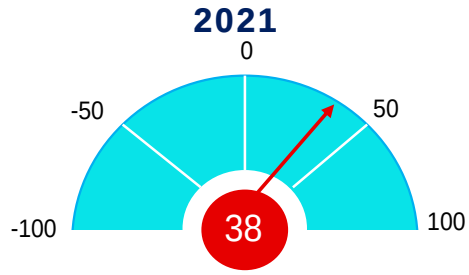


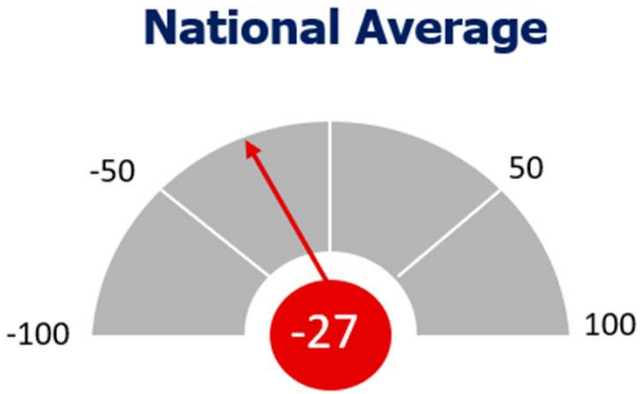
*2023 NPS is weighted using 2022 ridership due to 2023 ridership numbers not yet available as of October 2023

Bus NPS

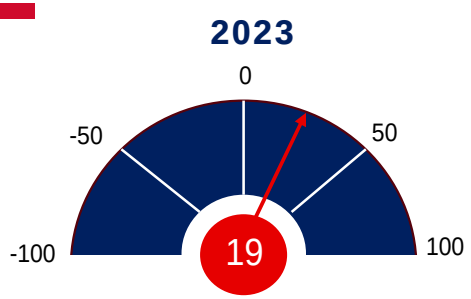

2023
0
-50
50
-100
100
7

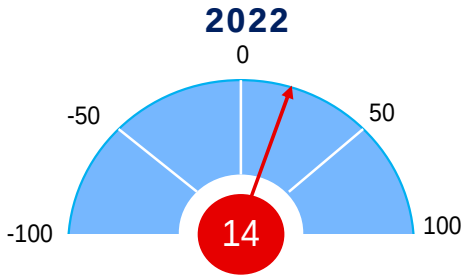

2022
0
-50
50
-100
100
10

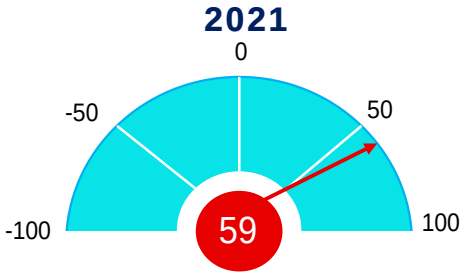

2021
0
-50
50
-100
100
38

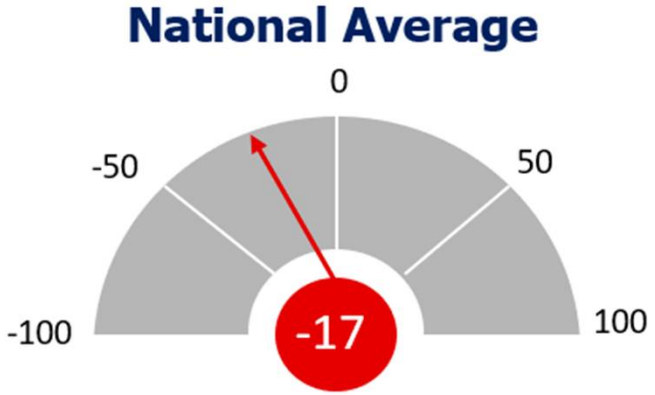

National Average
-50
50
-100
100
-27

Rail NPS


2023
0
-50
50
-100
100
19

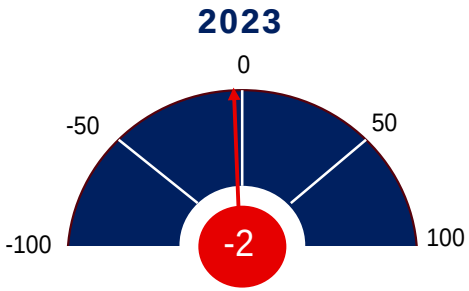

2022
0
-50
50
-100
100
14

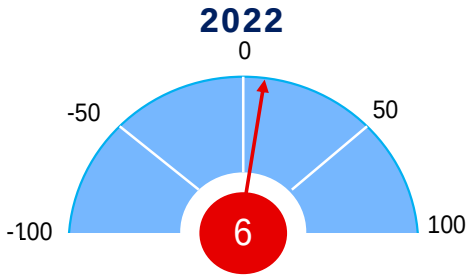

2021
0
-50
50
-100
100
59


National Average
0
-50
50
-100
100
-17

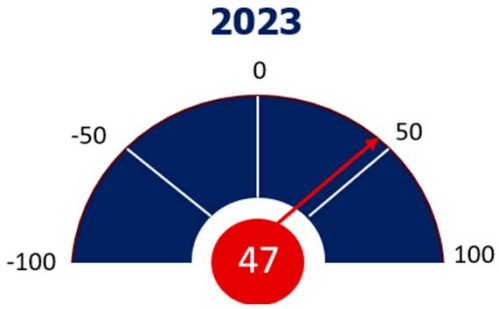
Rail NPS (cont'd)

Light Rail



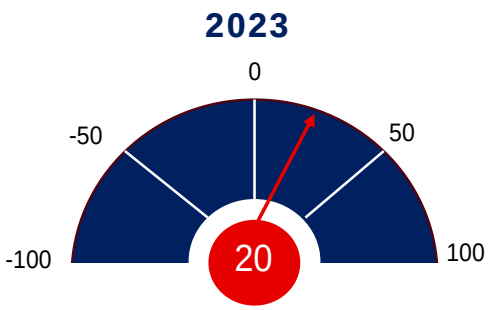


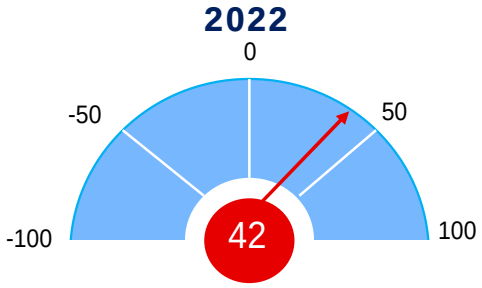
Commuter Rail



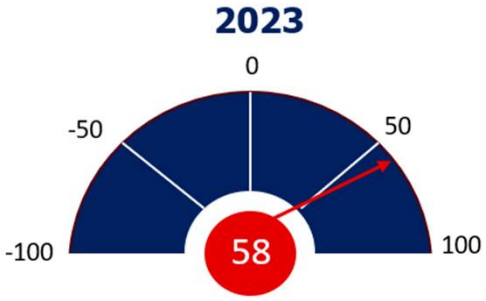
Paratransit NPS

Access-a-Ride



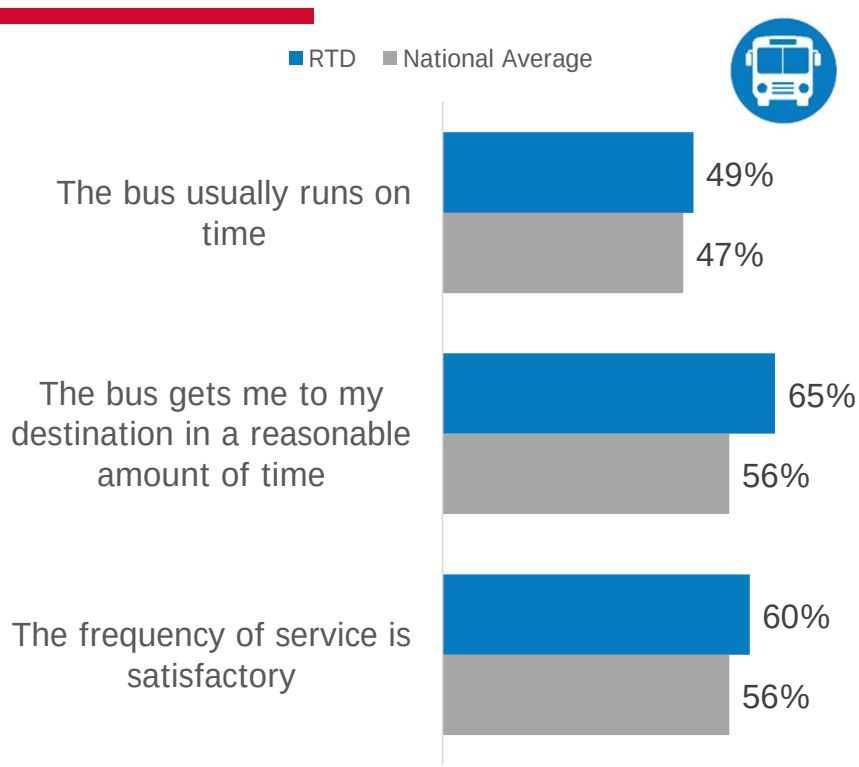


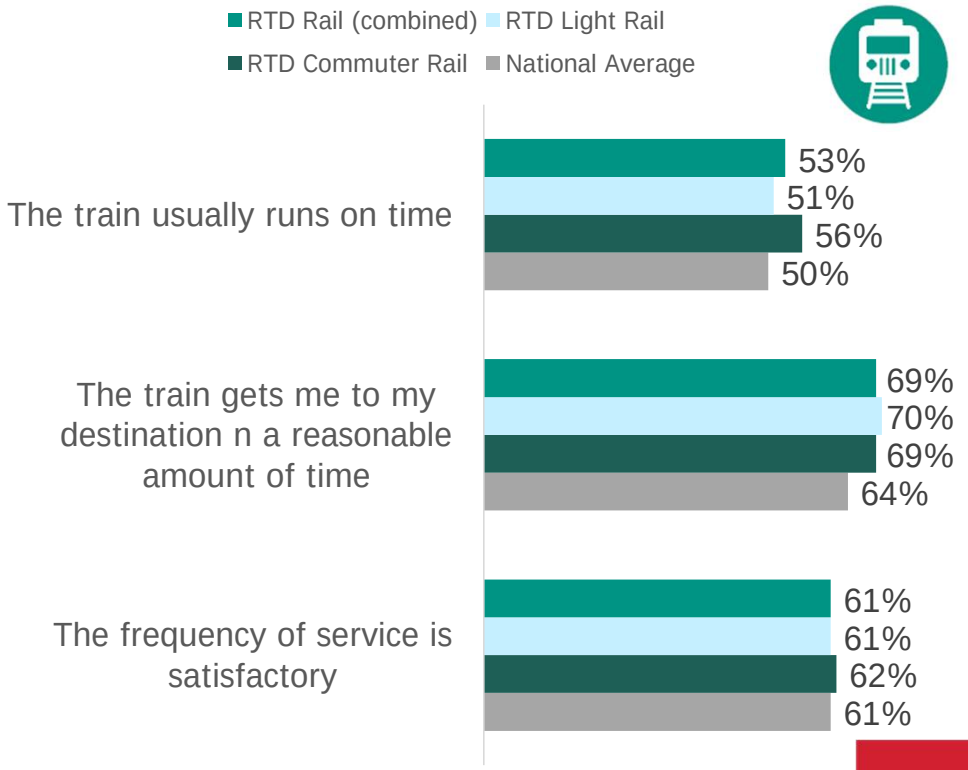
Access-on-Demand



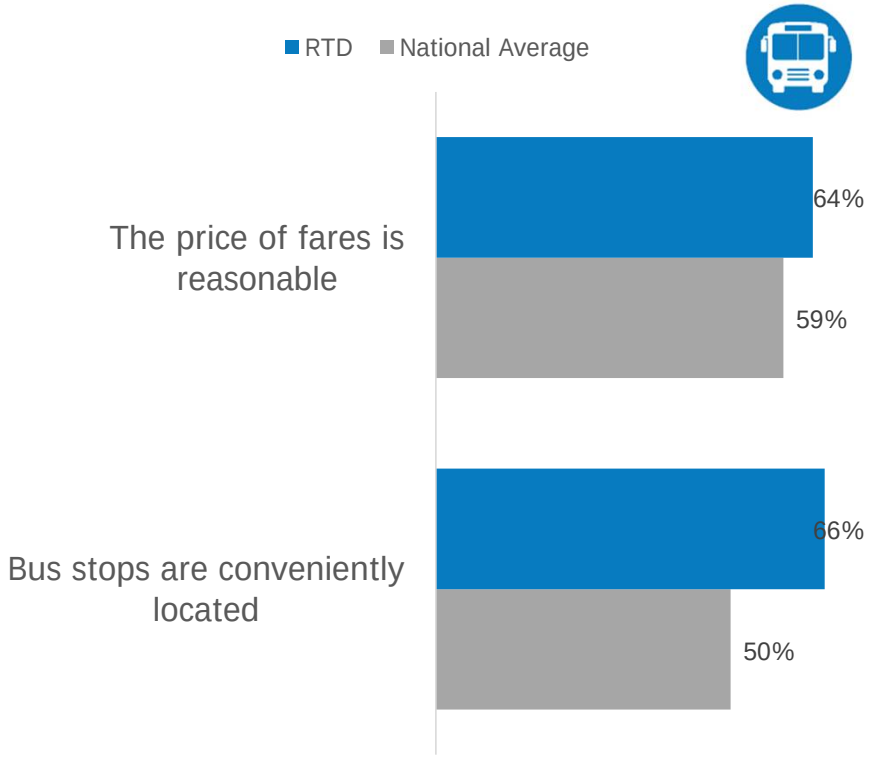
National Average Comparison

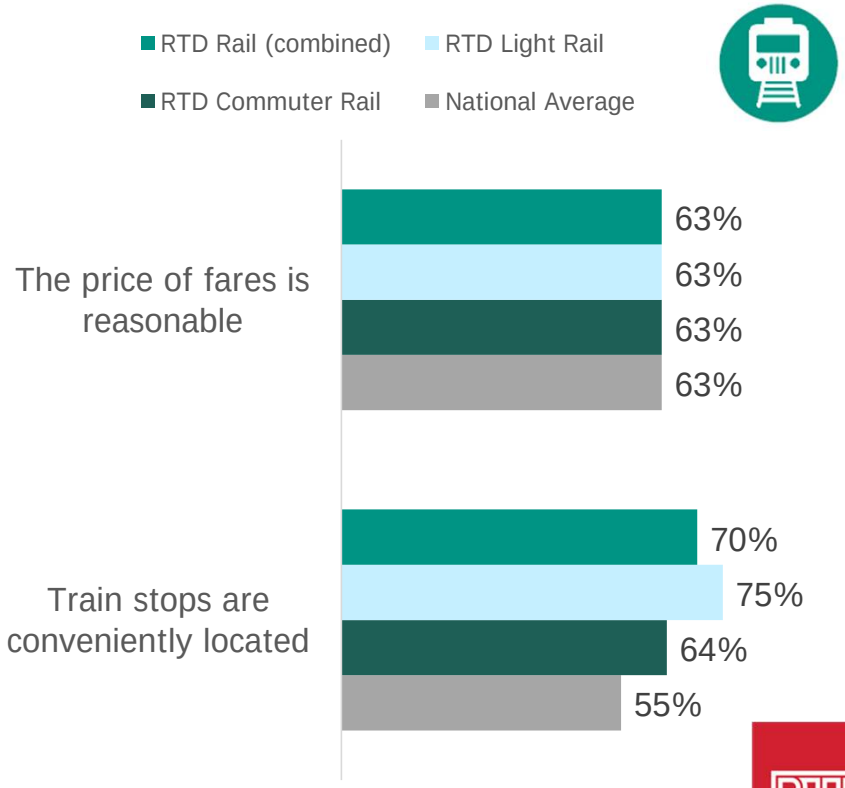
Performance



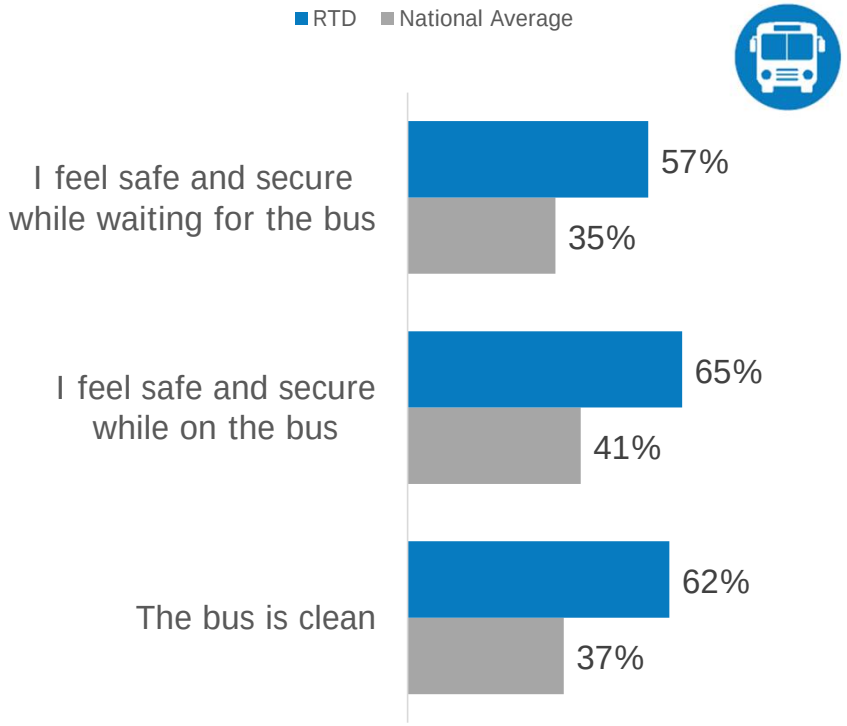


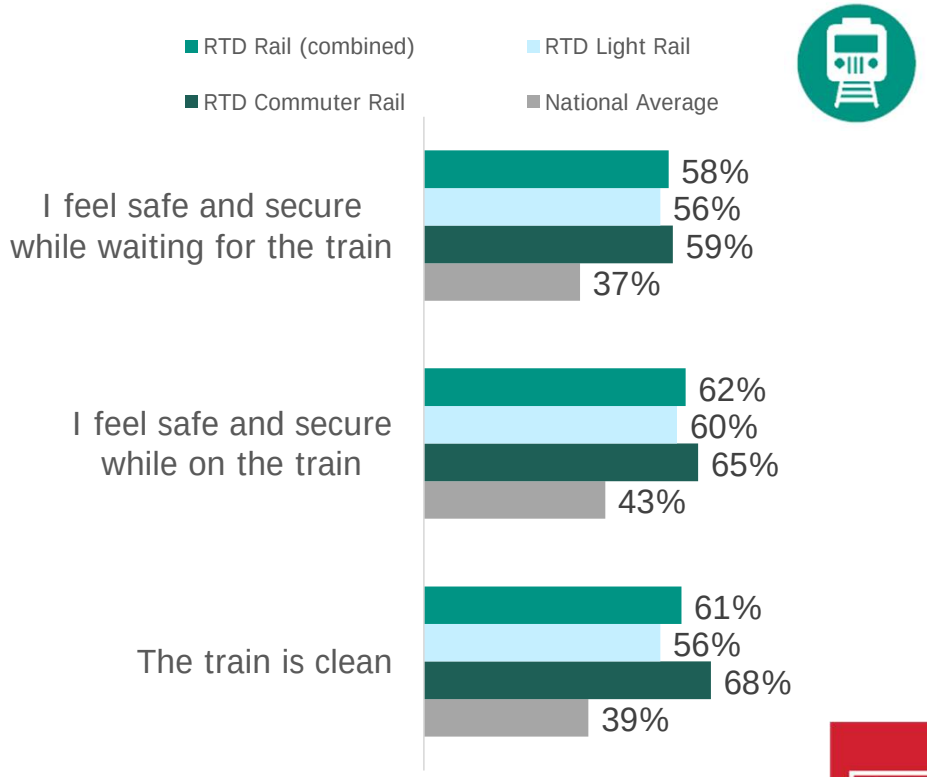
Access


RTD
National Average
The price of fares is reasonable
64%
59%
Bus stops are conveniently located
66%
50%

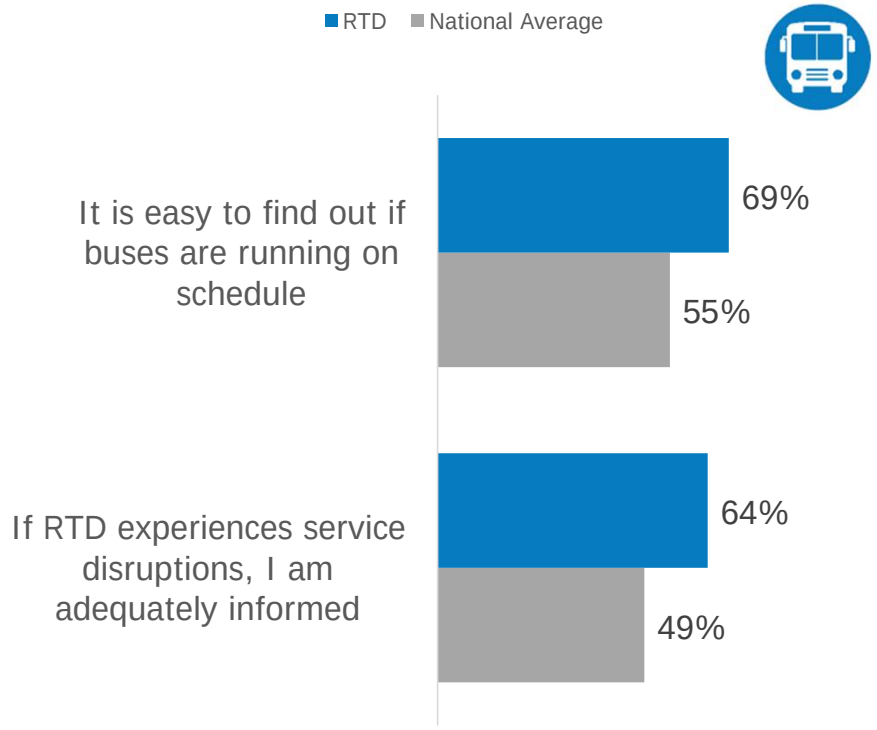

RTD Rail (combined)
RTD Light Rail
RTD Commuter Rail
National Average
The price of fares is reasonable
63%
63%
63%
63%
Train stops are conveniently located
70%
75%
64%
55%

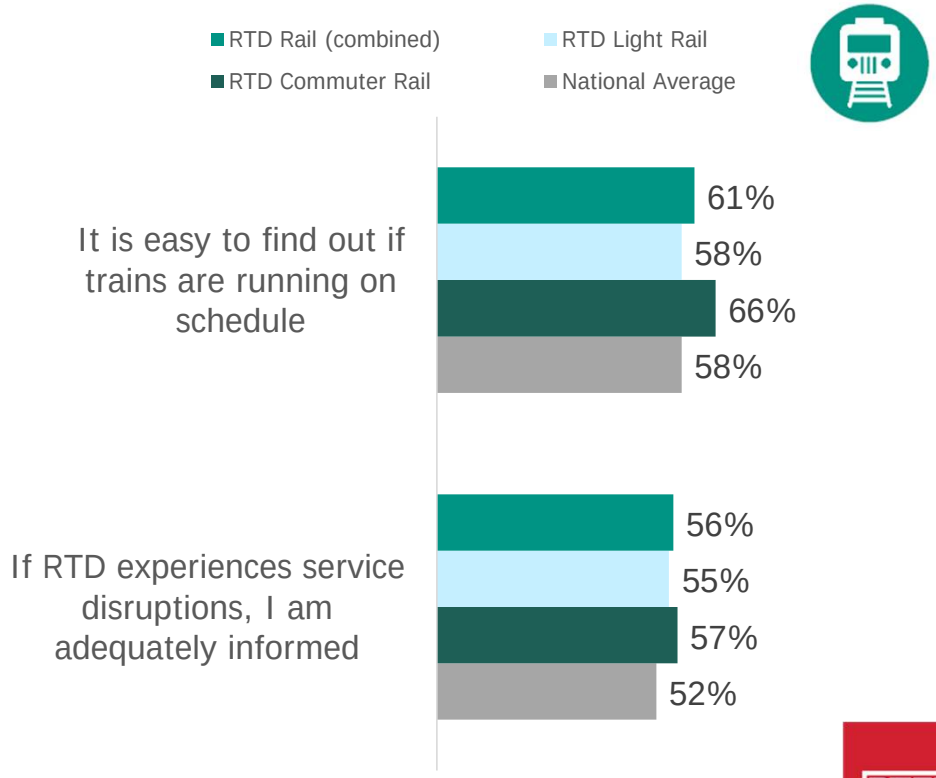
Safety and Comfort



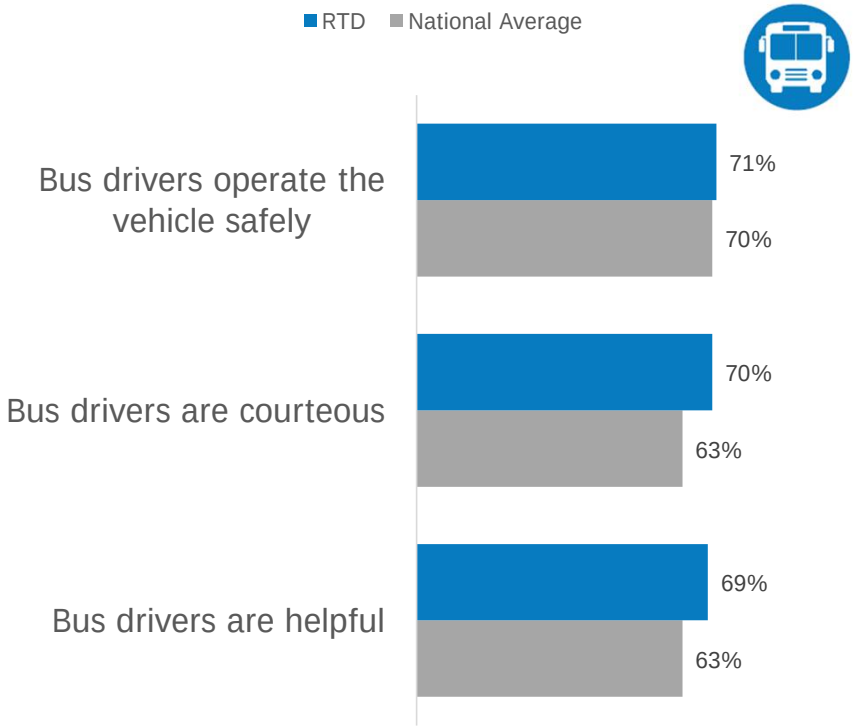


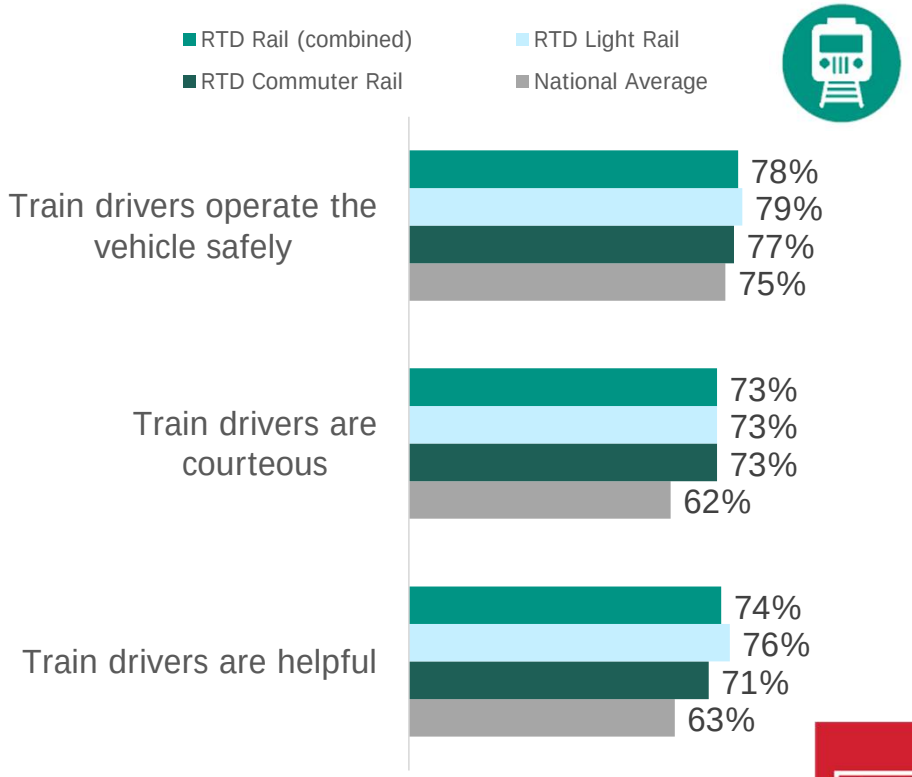
Information



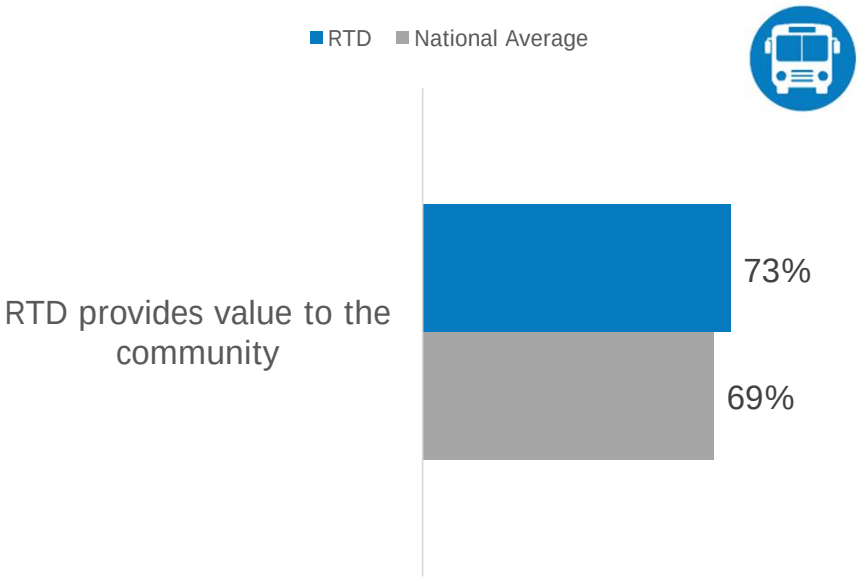


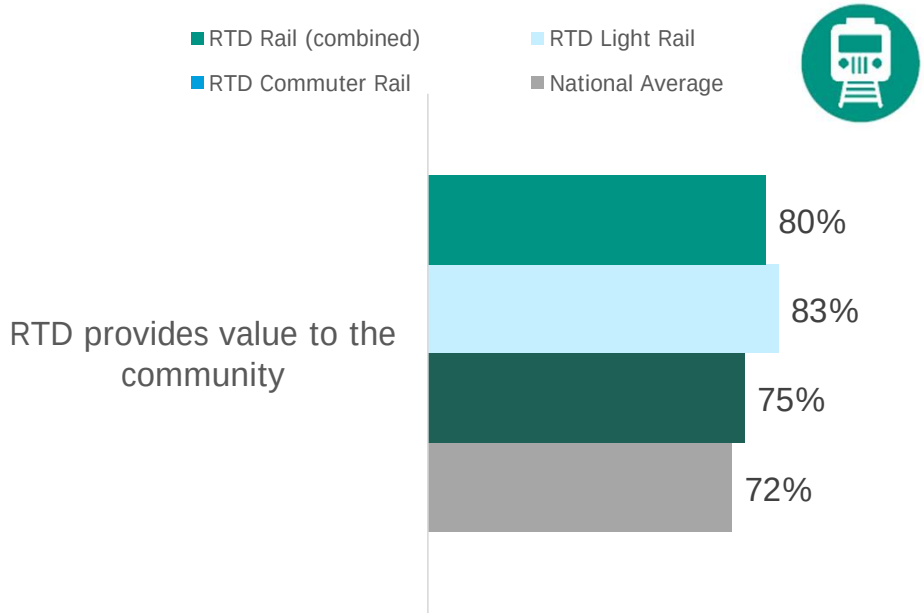
Driver (Operator) Behavior





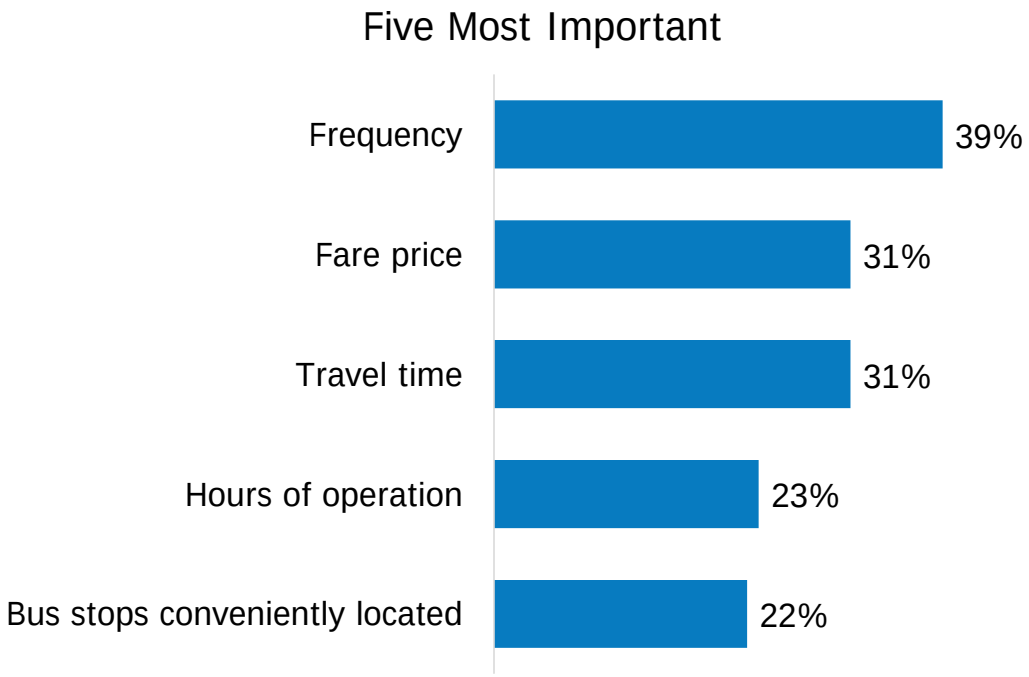
Community Value





Top Importance and Key Driver Analyses

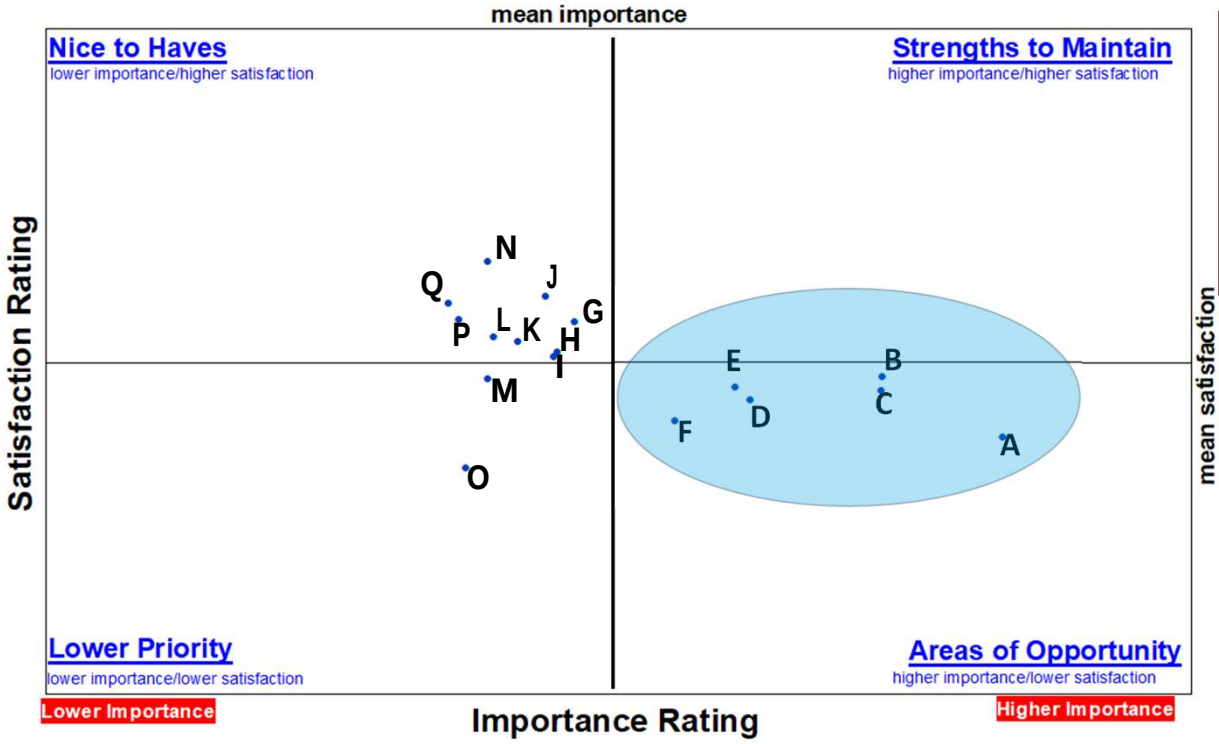
Top Importance: Bus



Additional items ranked by level of importance:

6. Timely arrival of buses
7. Helpful drivers
8. Personal security on bus
9. Bus cleanliness
10. Availability of route schedules and maps
11. Accuracy of route schedules and maps
12. Courteous drivers
13. Buses being operated safely
14. Courteous customer service representatives
15. Ease of finding out if buses are running on schedule
16. Access to key public service destinations
17. Timely resolution of questions, concerns or complaints
18. Personal security while waiting for bus
19. RTD system provides value to the community
20. Mechanical safety of bus

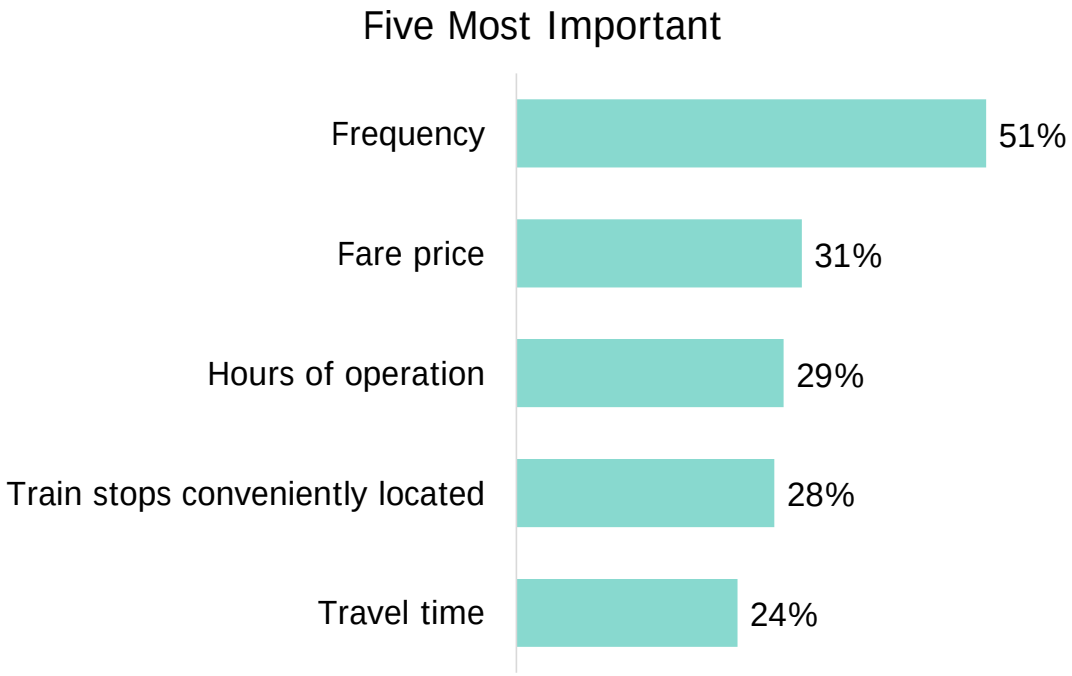
Key Driver Analysis: Bus



- A – Frequency (how often the buses come)
- B – Hours of operation
- C – Personal security on bus*
- D – Fare price
- E – Travel time*
- F – Bus cleanliness
- G – Accuracy of route schedules and maps
- H – Ease of finding out if the buses are running on schedule
- I – Helpful drivers
- J – Availability of route schedules and maps
- K – Courteous drivers
- L – Buses being operated safely
- M – Bus stops conveniently located
- N – Mechanical safety of bus
- O – Personal security while waiting for bus
- P – RTD system provides value to the community
- Q – Access to key public service destinations

*strong correlation indicated in regression analysis

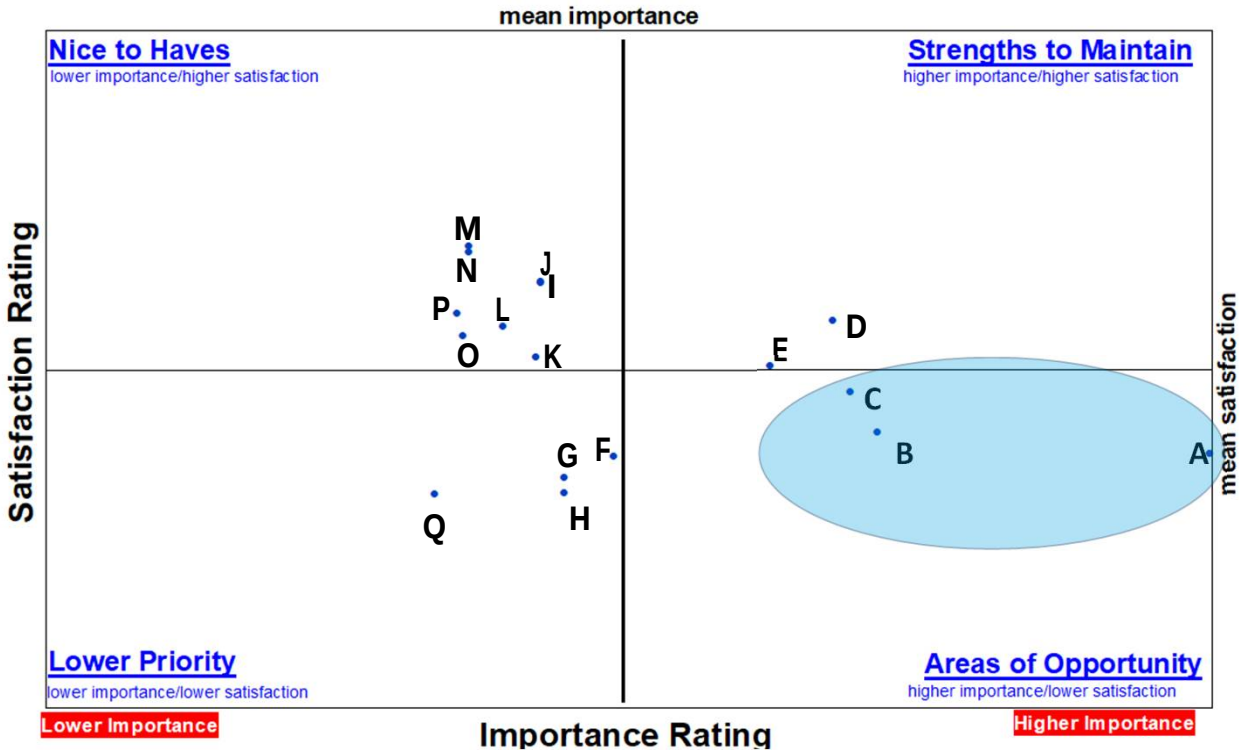
Top Importance: Light Rail



Additional items ranked by level of importance:

6. Timely arrival of trains
7. Personal security on train
8. Ease of finding out if trains are running on schedule
9. Train cleanliness
10. Trains being operated safely
11. Access to key public service destinations
12. Accuracy of route schedules and maps
13. Availability of route schedules and maps
14. Mechanical safety of train
15. RTD system provides value to the community
16. Courteous drivers
17. Helpful drivers
18. Personal security while waiting for train
19. Timely resolution of questions, concerns, or complaints
20. Courteous customer service representatives

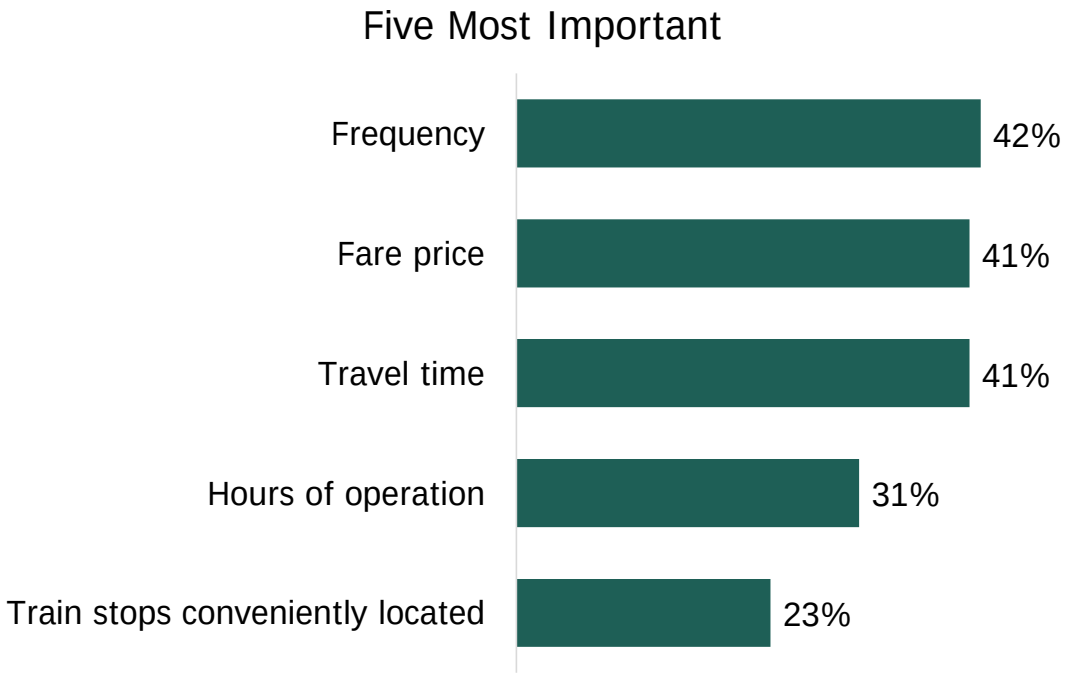
Key Driver Analysis: Light Rail



- A – Frequency (how often the trains come)*
- B – Fare price
- C – Hours of operation
- D – Train stops being conveniently located
- E – Travel time
- F – Personal security on the train
- G – Ease of finding out if the trains are running on schedule
- H – Train cleanliness
- I – Trains being operated safely
- J – Access to key public service destinations
- K – Accuracy of route schedules and maps
- L – Availability of route schedules and maps
- M – Mechanical safety of trains
- N – RTD provides value to the community
- O – Courteous drivers
- P – Helpful drivers
- Q – Personal security while waiting for the train

*strongest correlation indicated in regression analysis

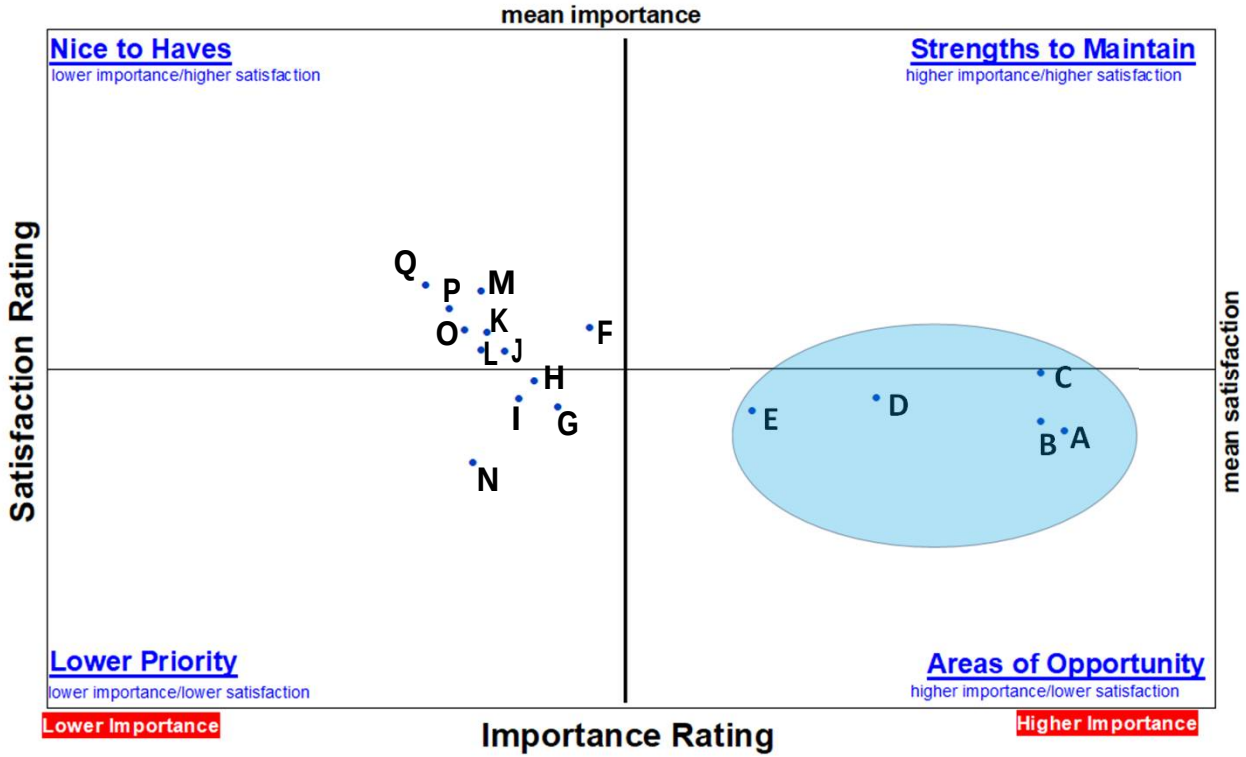
Top Importance: Commuter Rail



Additional items ranked by level of importance:

6. Timely arrival of trains
7. Availability of route schedules and maps
8. Personal security on train
9. Train cleanliness
10. Ease of finding out if trains are running on schedule
11. Helpful drivers
12. Access to key public service destinations
13. Accuracy of route schedules and maps
14. Trains being operated safely
15. Personal security while waiting for train
16. Courteous drivers
17. Courteous customer service representatives
18. Timely resolution of questions, concerns or complaints
19. RTD system provides value to the community
20. Mechanical safety of train
21. Access to key public service destinations

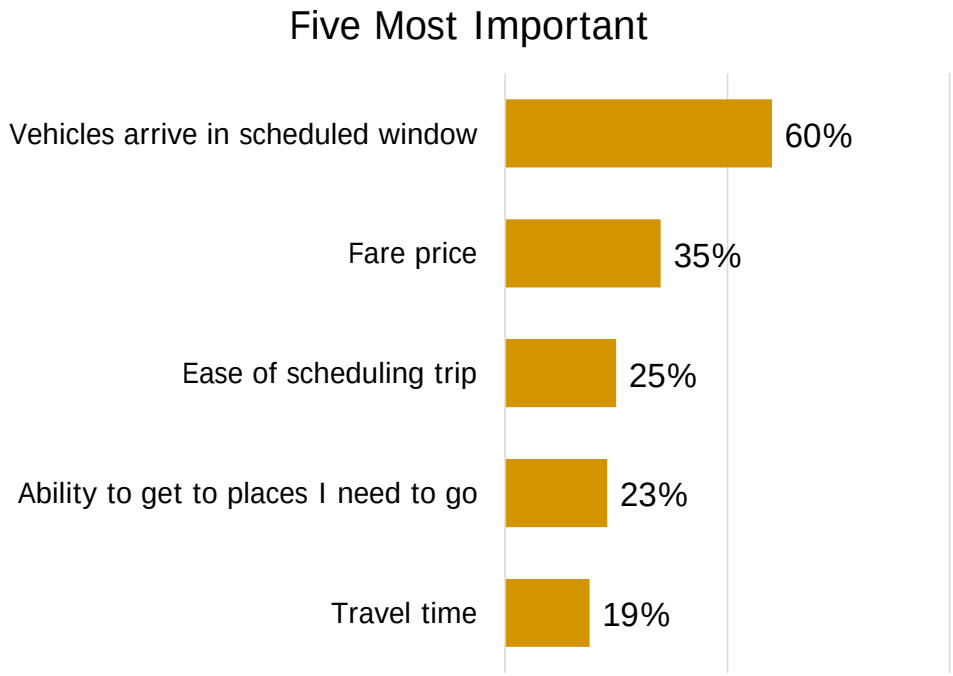
Key Driver Analysis: Commuter Rail



- A – Frequency (how often the trains come)
- B – Fare price
- C – Travel time*
- D – Hours of operation
- E – Train stops being conveniently located
- F – Availability of route schedules & maps
- G – Personal security on train
- H – Train cleanliness
- I – Ease of finding out if trains are running on schedule
- J – Helpful drivers
- K – Access to key public service destinations
- L – Accuracy of route schedules & maps
- M – Trains being operated safely
- N – Personal security while waiting for the train
- O – Courteous drivers
- P – RTD provides value to the community
- Q – Mechanical safety of trains

strongest correlation indicated in regression analysis

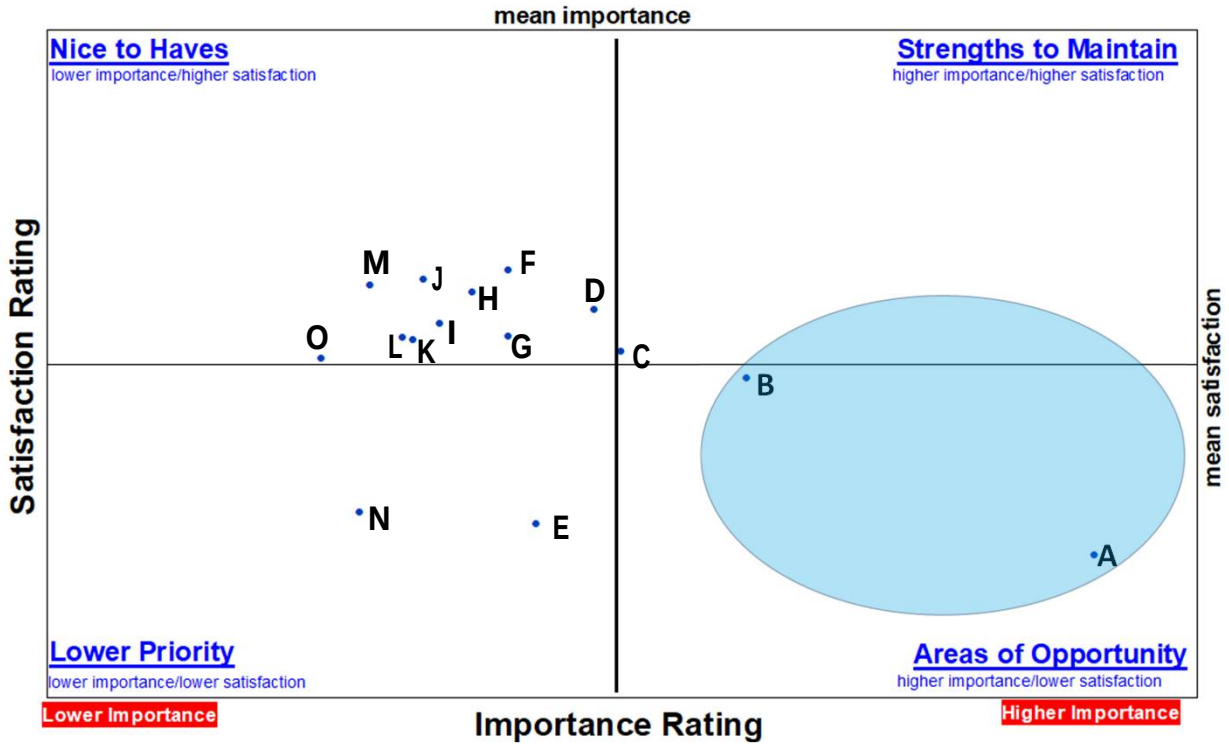
Top Importance: Access-a-Ride



Additional items ranked by level of importance:

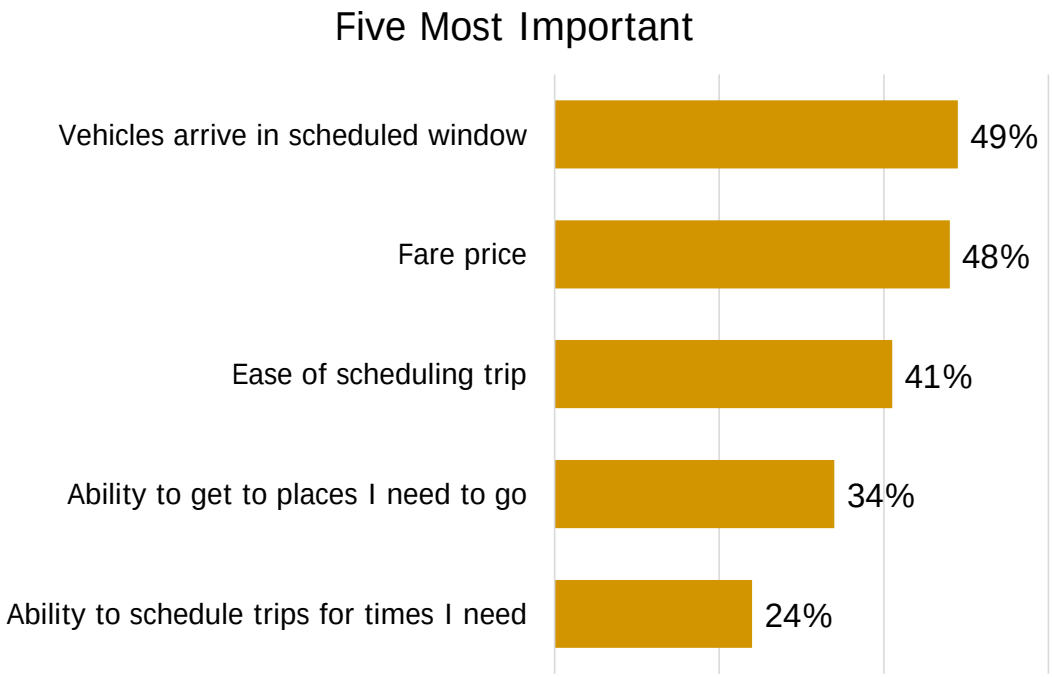
6. Feeling safely secured in vehicle
7. Ability to schedule trips for times I need to travel
8. Drivers operate vehicles safely
9. Drivers being courteous
10. Personal security (safe from crime) on vehicle
11. Drivers being helpful
12. Proper mechanical safety of vehicle
13. Vehicle cleanliness
14. Timely resolutions of my questions, concerns or complaints
15. Vehicle comfort
16. Availability of scheduling staff

Key Driver Analysis: Access-a-Ride



- A – Vehicles arriving within scheduled window
- B – Fare price
- C – Ease of scheduling a trip
- D – Ability to get to places I need to go to
- E – Travel time
- F – Feeling safely secured in vehicles
- G – Ability to schedule trips for the times I need
- H – Drivers operate the vehicle safely
- I – Drivers being courteous
- J – Personal security (safe from crime) on vehicle
- K – Drivers being helpful
- L – Proper mechanical safety of vehicle
- M – Vehicle cleanliness
- N – Vehicle comfort
- O – Availability of scheduling staff

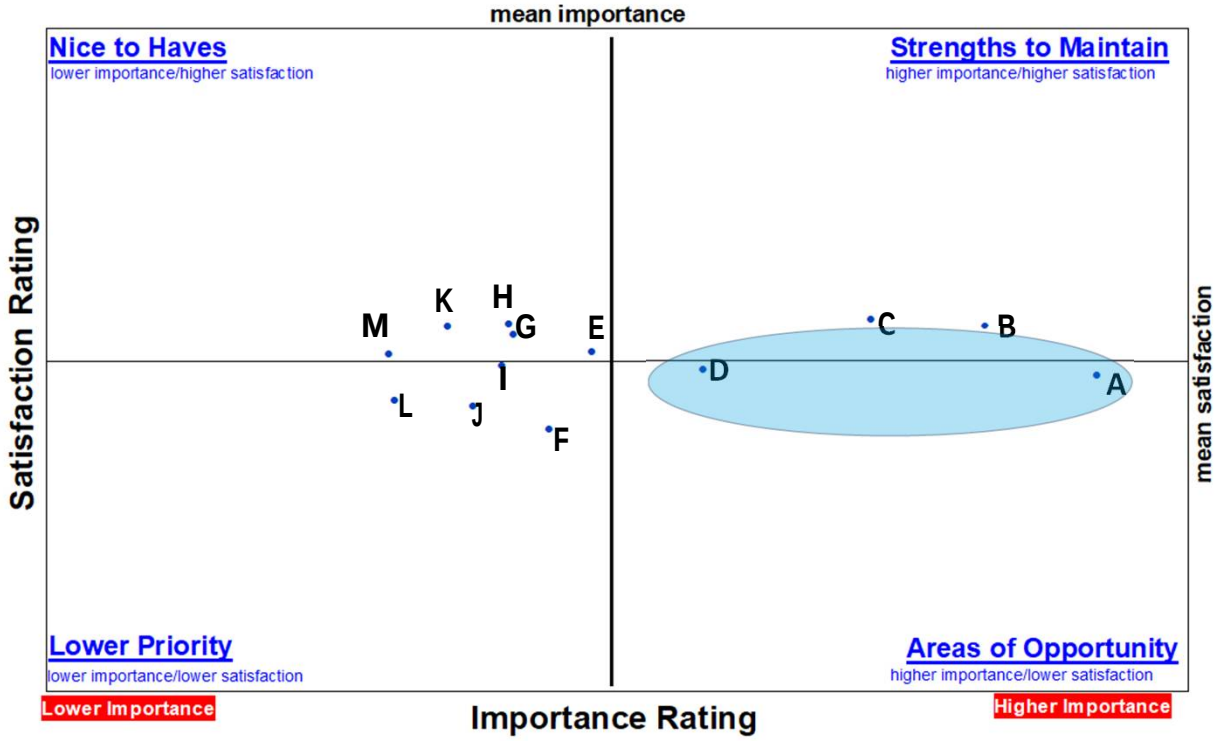
Top Importance: Access-on-Demand



Additional items ranked by level of importance:

6. Travel time
7. Feeling safely secured in vehicle
8. Personal security (safe from crime) on vehicle
9. Drivers operate vehicles safely
10. Drivers being courteous
11. Drivers being helpful
12. Proper mechanical safety of vehicle
13. Vehicle comfort
14. Vehicle cleanliness
15. Timely resolutions of my questions, concerns or complaints

Key Driver Analysis: Access-on-Demand



- A – Fare price
- B – Ease of scheduling a trip
- C – Ability to get to places I need to go
- D – Ability to schedule trips for the times I need
- E – Travel time
- F – Feeling safely secured in vehicles
- G – Personal security (safe from crime) while riding
- H – Drivers operate the vehicle safely
- I – Drivers being courteous
- J – Drivers being helpful
- K – Proper mechanical safety of vehicles
- L – Vehicle comfort
- M – Vehicle cleanliness

Notable Changes

Notable Increases in 2023: Bus

Survey Question	Change in 2023 Compared to 2022
If RTD experiences disruptions, I am adequately informed	+22%
Price of fare is reasonable	+14%
RTD provides adequate information about the services it provides	+12%
I feel informed about service changes	+12%
RTD Communication material and information are of high quality	+11%
Buses are clean	+11%
It is easy to find out if buses are running on schedule	+4%
Frequency of service is satisfactory	+3%

Notable Decreases in 2023: Bus

Survey Question	Change in 2023 Compared to 2022
Buses usually run on time	-11%
Bus stops are conveniently located	-9%
Bus drivers operate vehicles safely	-9%
Buses operate on the days I need	-8%
Bus gets me to my destination in a reasonable amount of time	-5%

Notable Increases in 2023: Rail

Survey Question	Change in 2023 Compared to 2022
If RTD experiences disruptions, I am adequately informed	+19%
RTD Communication material and information are of high quality	+16%
Train drivers are helpful	+14%
RTD provides adequate information about the services it provided	+11%
I feel informed about service changes	+11%
Trains are clean	+11%
Price of fare is reasonable	+9%
Train drivers are courteous	+8%

Notable Decreases in 2023: Rail

Survey Question	Change in 2023 Compared to 2022
Trains usually run on time	-14%
Trains get me to my destination in a reasonable amount of time	-8%
Trains are mechanically safe	-8%
Train drivers operate vehicles safely	-8%
Trains operate on the days I need	-8%
Train stops are conveniently located	-5%

Community Value Survey

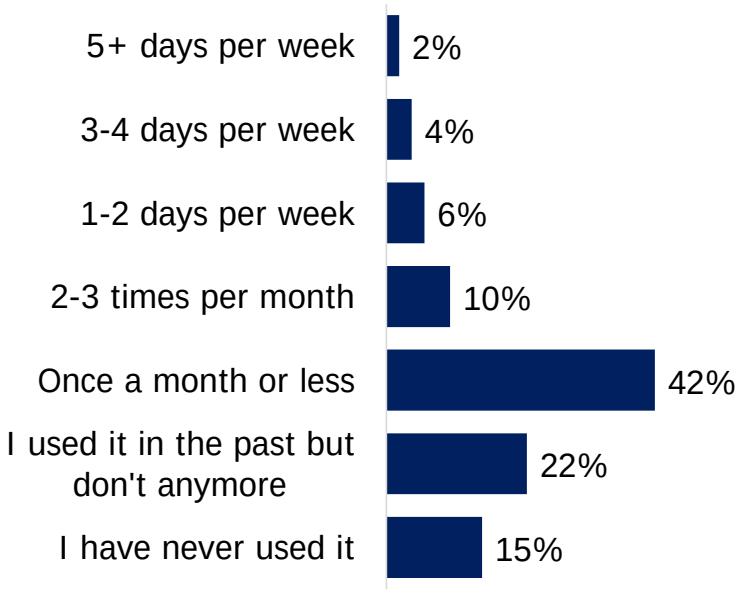
Methodology: Community Survey

- Distribution: mailed to random sample of households in the Denver metro area
- Survey period: September 9 through September 22, 2023
- Results were monitored to maintain demographic distribution in proportion to the region
- Target sample: 400 (+/- 4.9% at the 95% confidence level)
- 540 completed surveys

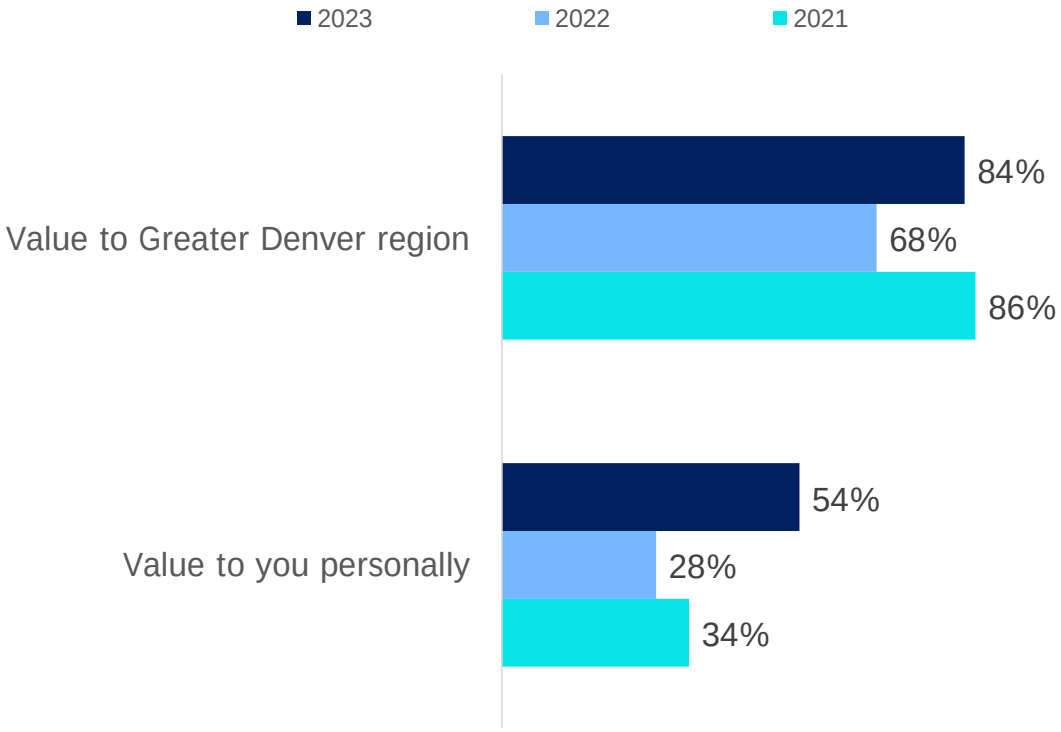
Awareness and Frequency

Are you aware of RTD, the public transportation system that operates bus, rail and paratransit services in the Denver metro region?

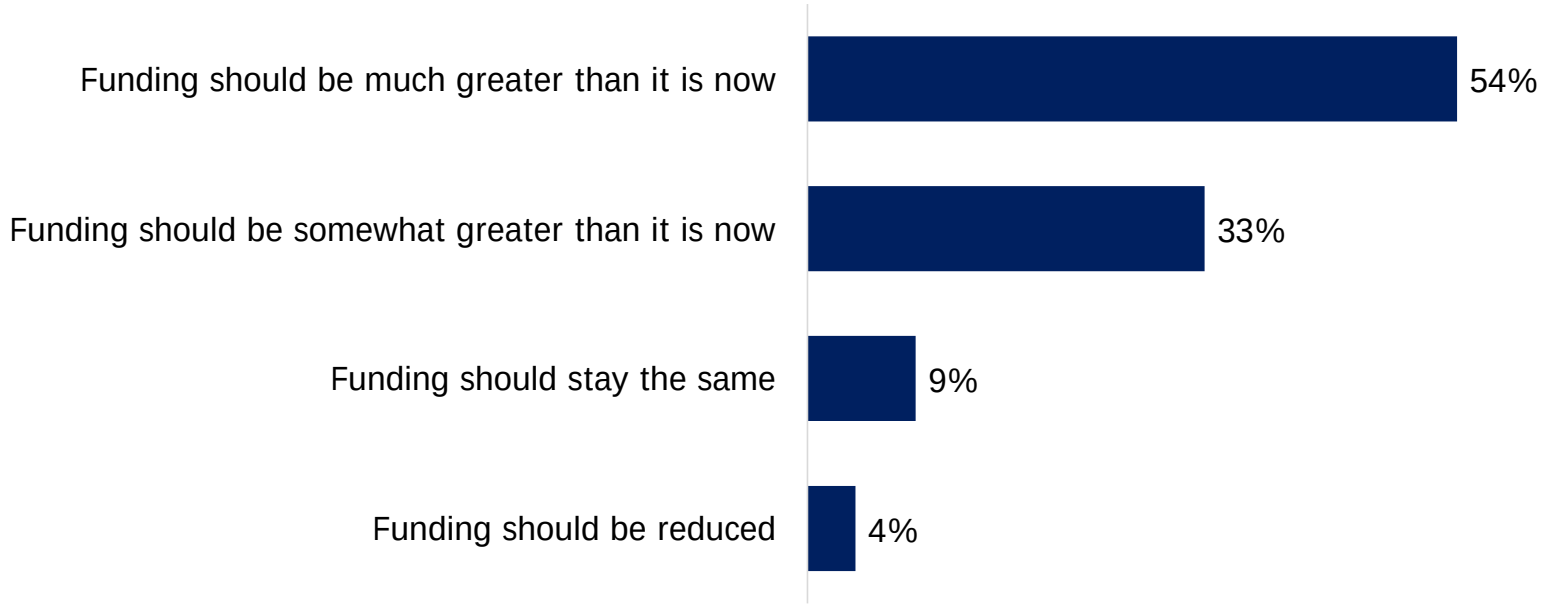
On average, how often do you use RTD?



Opinion of RTD's Value

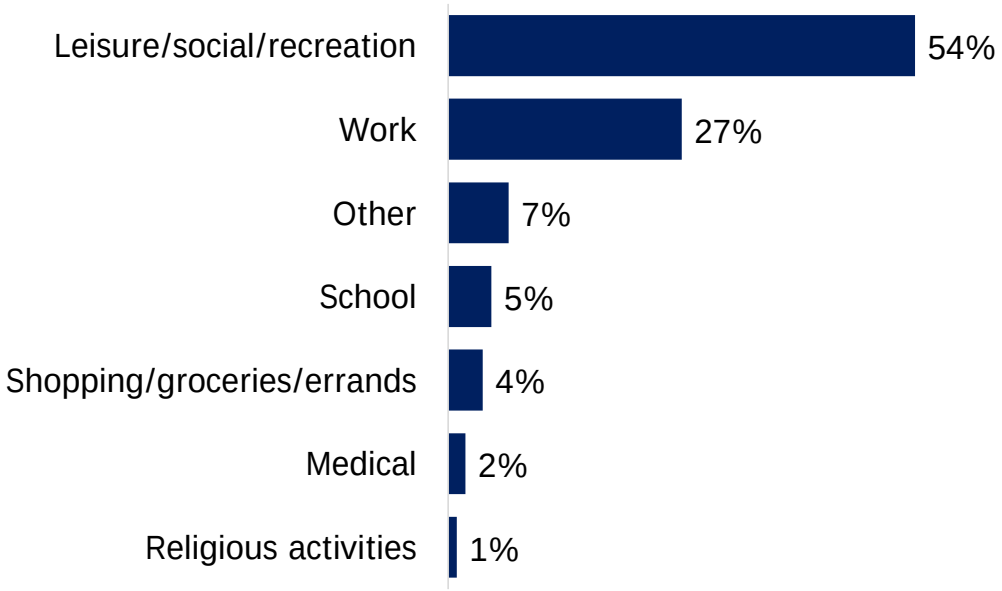


Funding Over the Next Five Years

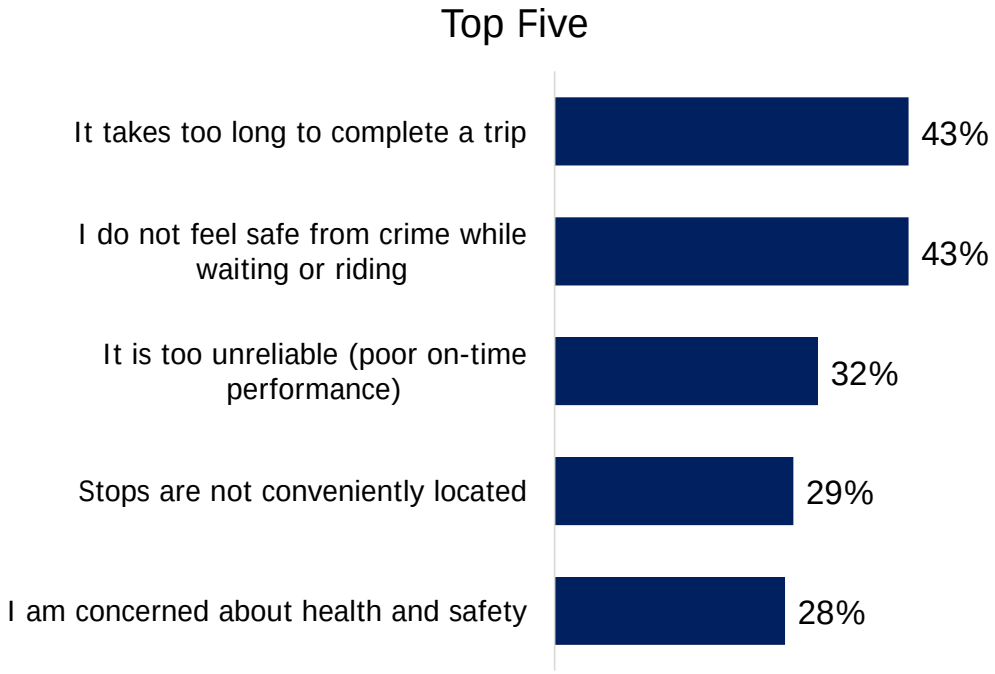


Reasons for Public Transportation Use

What is your primary purpose for using public transportation?



Reasons for Discontinued Use

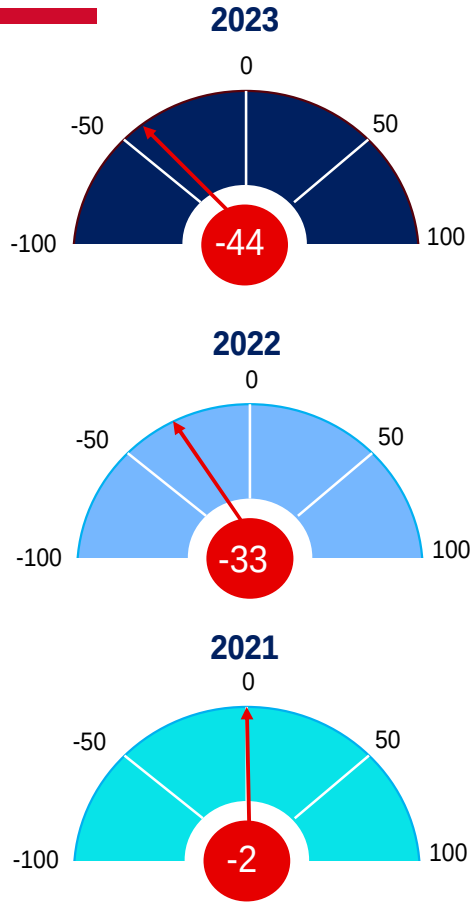


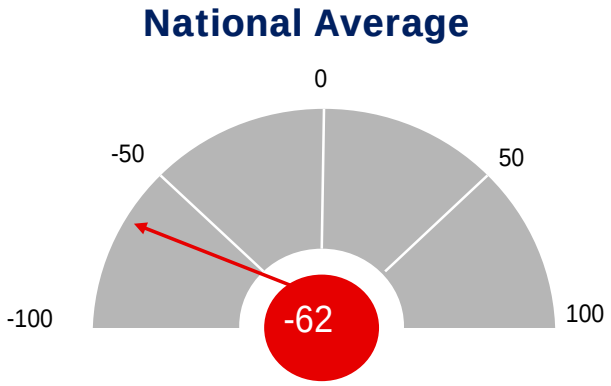
Additional reasons:

6. Bus/train does not go to places I need to go
7. Service is too infrequent
8. It is too expensive
9. I live in an area where services were reduced or suspended
10. Bus/train does not operate at times I need it to
11. I started working from home
12. I no longer live within service area
13. I am no longer employed
14. Schedules are too complicated
15. Bus/train does not operate on days I need it to
16. Limiting other non-work travel
17. I do not feel that RTD's vehicles are mechanically safe

Net Promoter Score

Net Promoter Score: Community

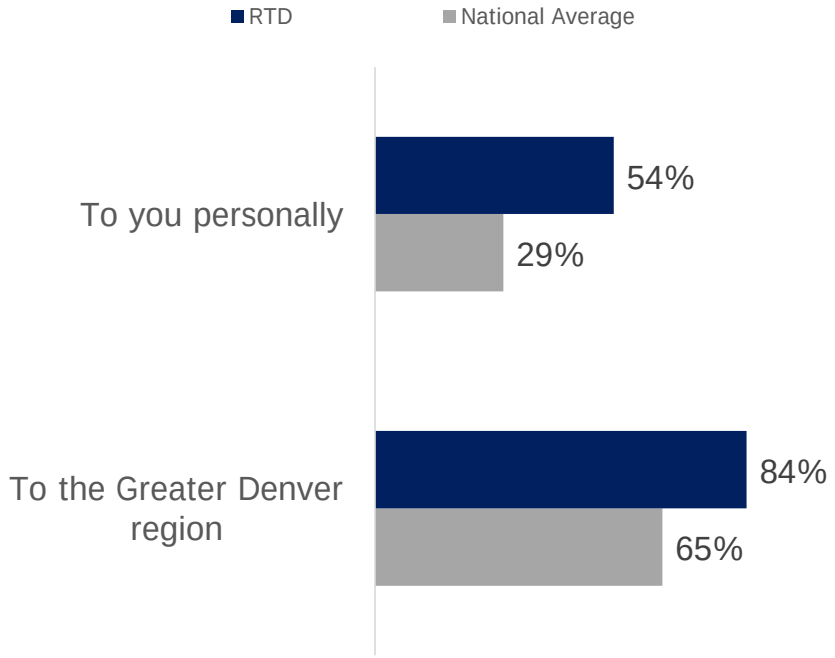


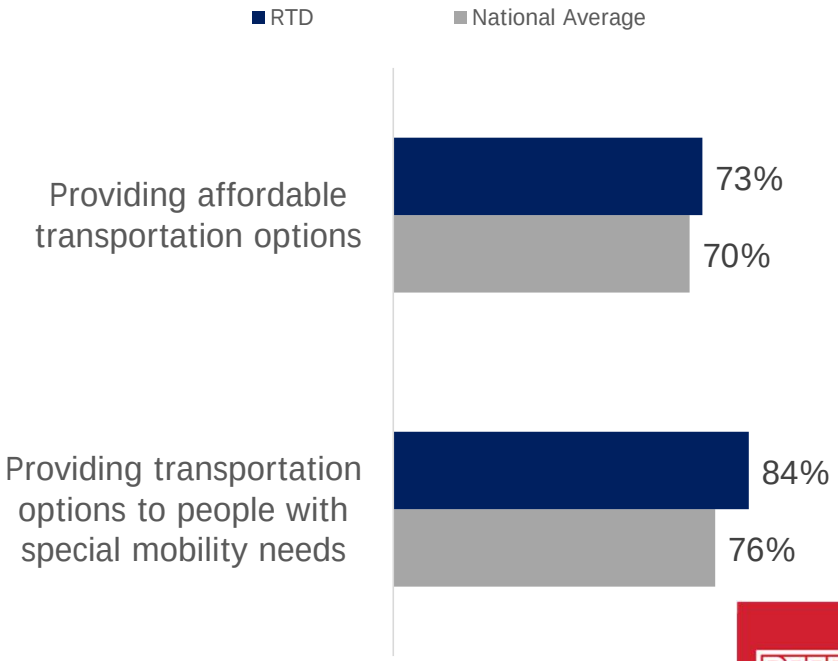


National Average Comparison

Value of RTD

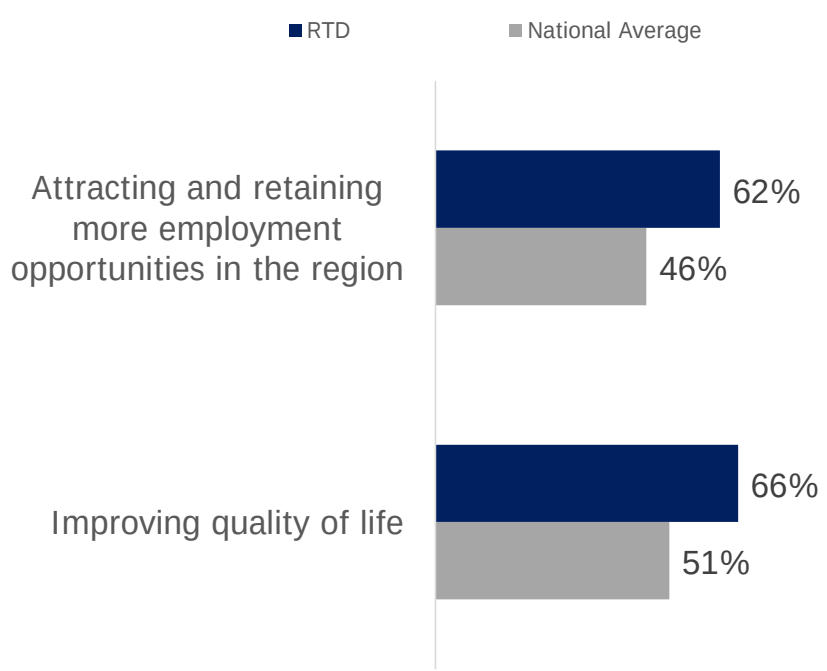
How valuable is RTD (the transportation service):

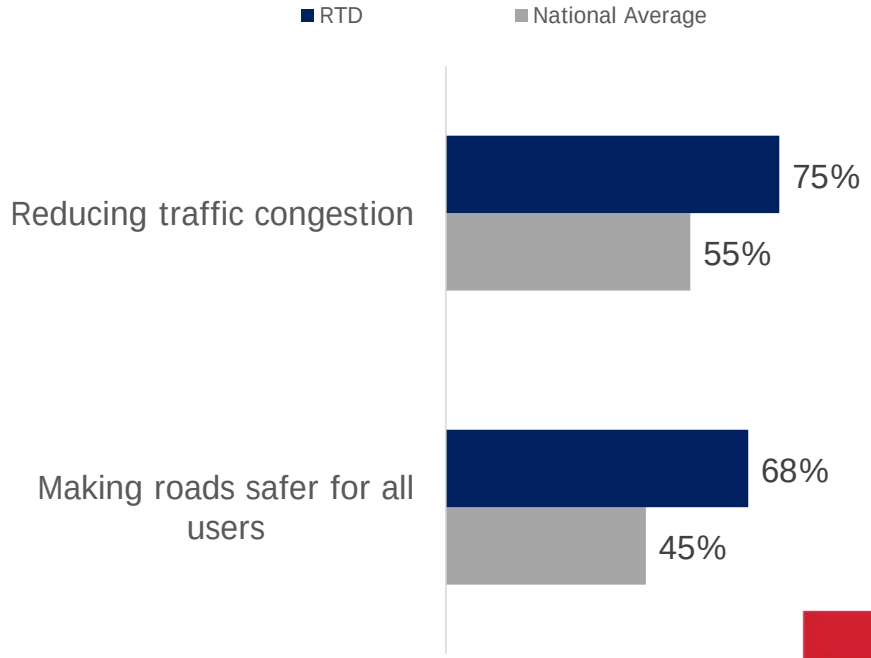




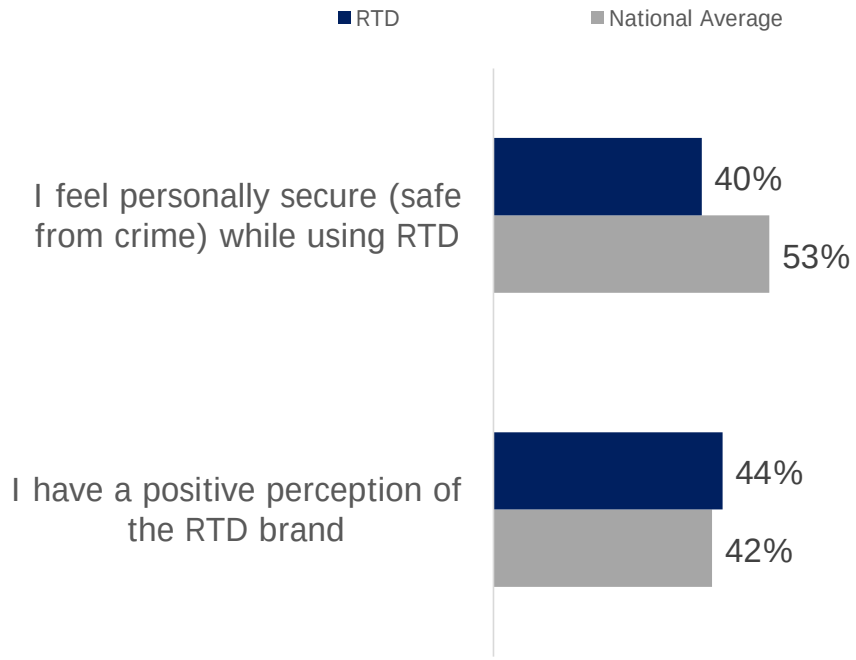
Value of RTD (cont'd)

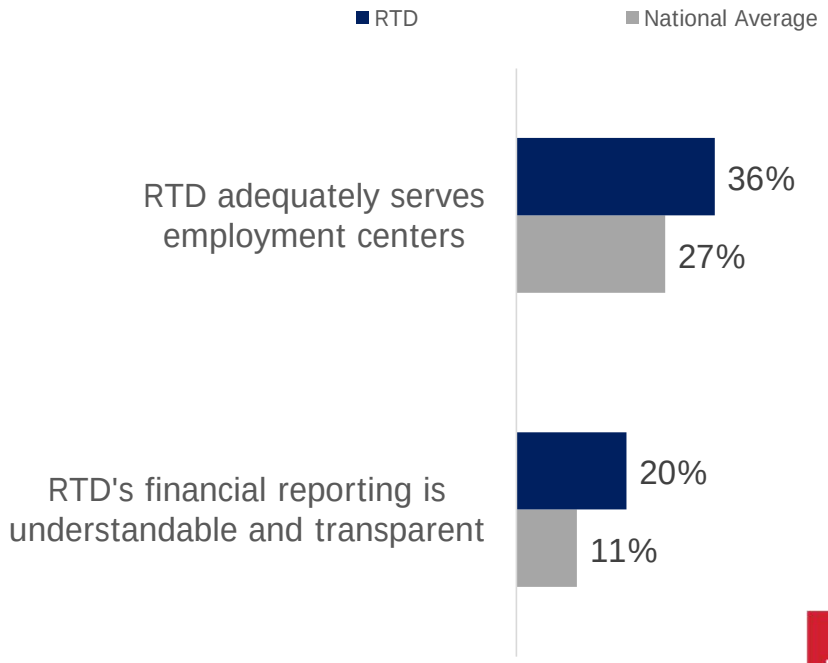
How valuable is RTD (the transportation service):





Levels of Agreement

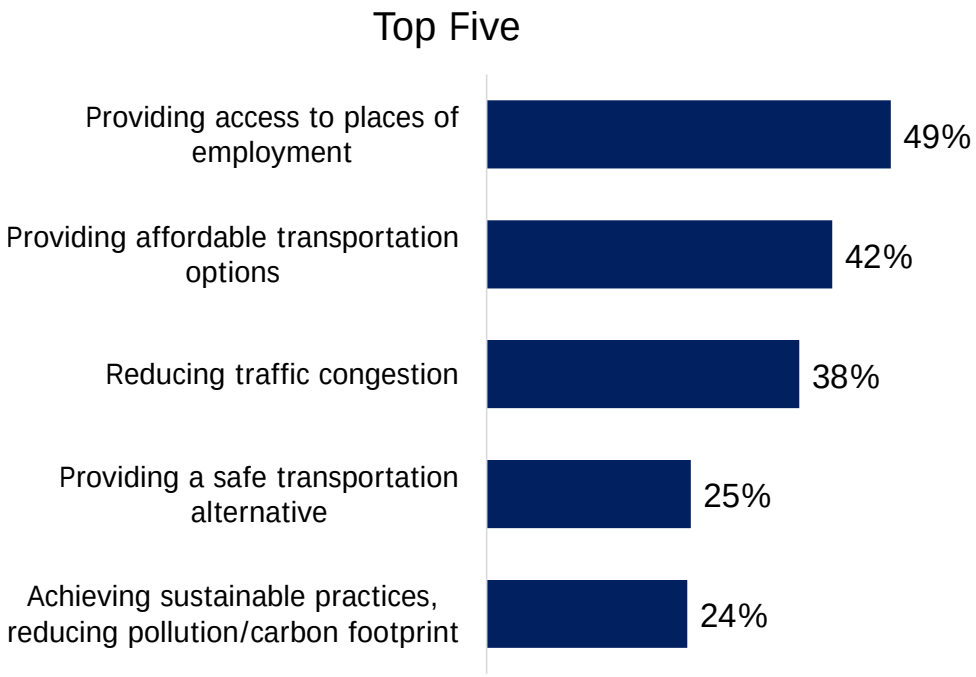




% Agree and Strongly Agree

Top Importance and Key Driver Analysis

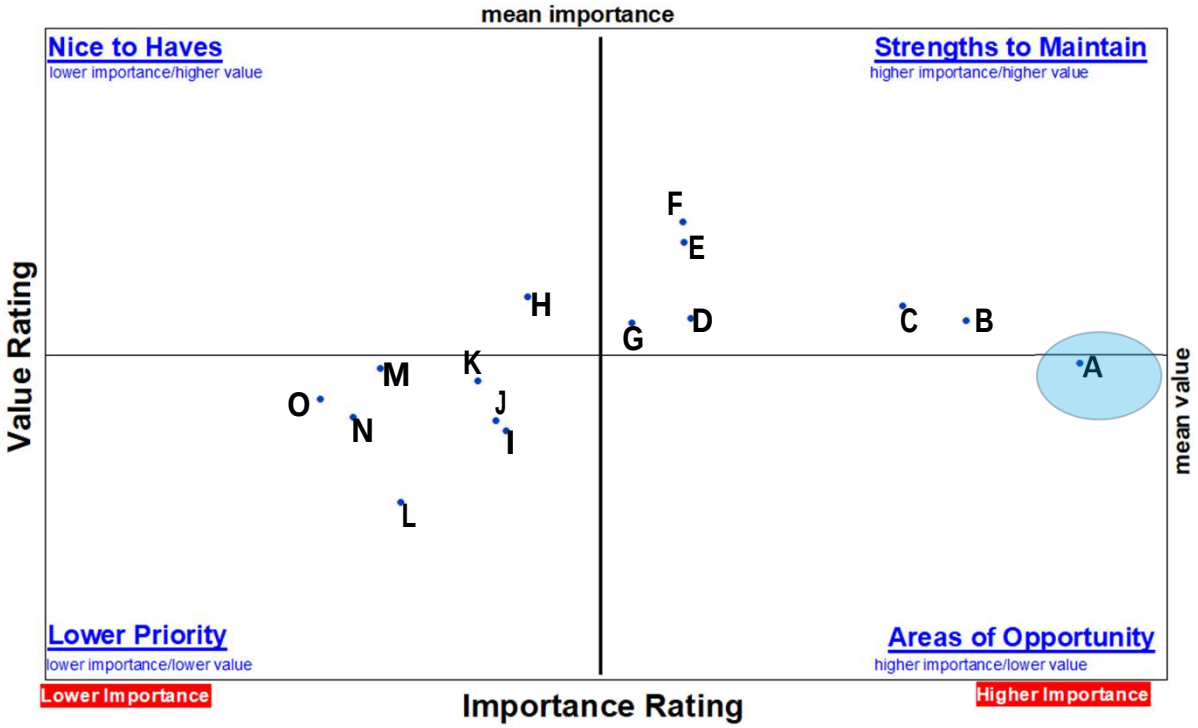
Most Important Values to Community



Additional areas:

6. Providing transportation options to people with special mobility needs
7. Providing access to places of leisure and recreation
8. Providing access to educational facilities
9. Providing access to the region/adjacent cities and counties
10. Providing access to medical facilities
11. Improving quality of life
12. Providing opportunities for locating affordable housing
13. Making roads safer for all users
14. Attracting and retaining more employment opportunities in the region
15. Supporting community businesses

Key Driver Analysis: Community



- A – Providing access to places of employment
- B – Providing affordable transportation options
- C – Reducing traffic congestion
- D – Providing a safe transportation alternative
- E – Achieving sustainable practices
- F – Providing transportation to those with special mobility needs
- G – Providing access to places of leisure and recreation
- H – Providing access to educational facilities
- I – Providing access to the region/adjacent cities and counties
- J – Providing access to medical facilities
- K – Improving quality of life
- L – Providing opportunities to locate affordable housing
- M – Making roads safer for all users
- N – Attracting and retaining more employment opportunities
- O – Supporting community businesses

Stakeholder Survey

Methodology: Stakeholder Survey

- 150 stakeholders identified
- Distribution: email and phone
- Survey period: September 5 through 29, 2023
- Target sample: 30
- 31 completed surveys

Survey Participation*

Chambers of Commerce
- Asian Chamber of Commerce Colorado
- Aurora Chamber of Commerce
- Cherry Creek Chamber of Commerce
- Commerce City Chamber of Commerce
- Conifer Chamber of Commerce
- Golden Chamber of Commerce
- Greater Brighton Chamber Of Commerce & Tourism Bureau
- Greater Glendale Chamber of Commerce
- Parker Chamber of Commerce

Higher Education
- Auraria Higher Education Center
- Colorado School of Mines
- Auguste Escoffier School of Culinary Art

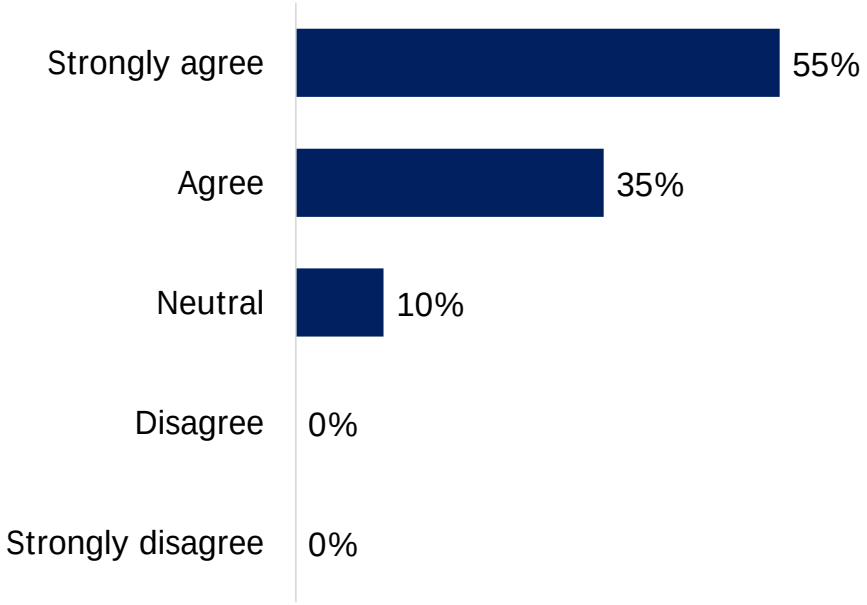
Major Employers
- DaVita
- Kaiser Permanente
- Echo Star Corporation
- Noodles & Company

Other
- Aurora Economic Development Council
- West Corridor Transportation Management Association

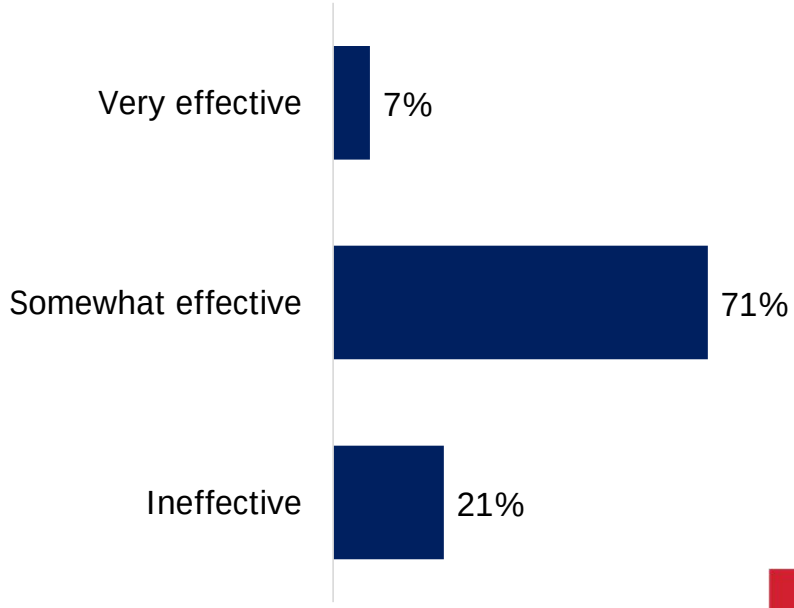
**31 community stakeholders responded, but only 19 disclosed their identity*

Value and Effectiveness

RTD provides value to the Denver Metro Region

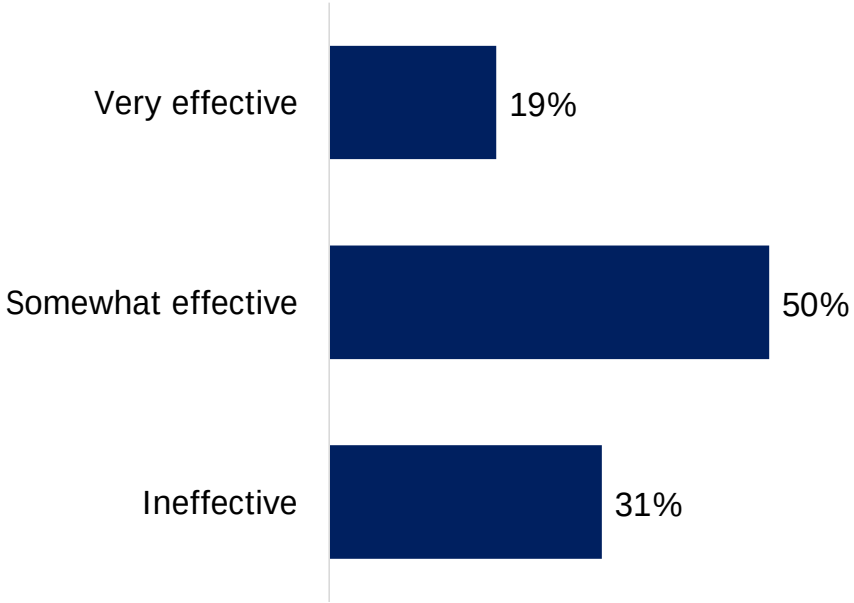


How effective is RTD at providing service to employment centers?

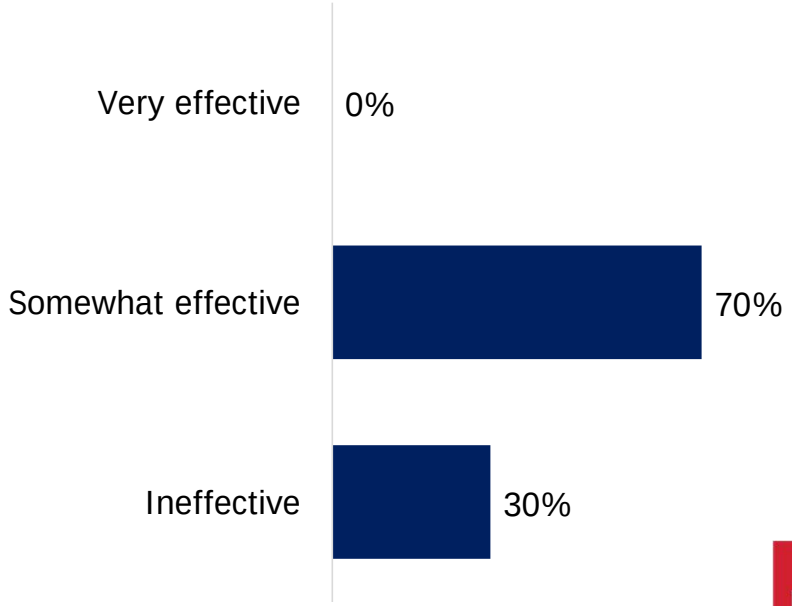


Effectiveness (cont'd)

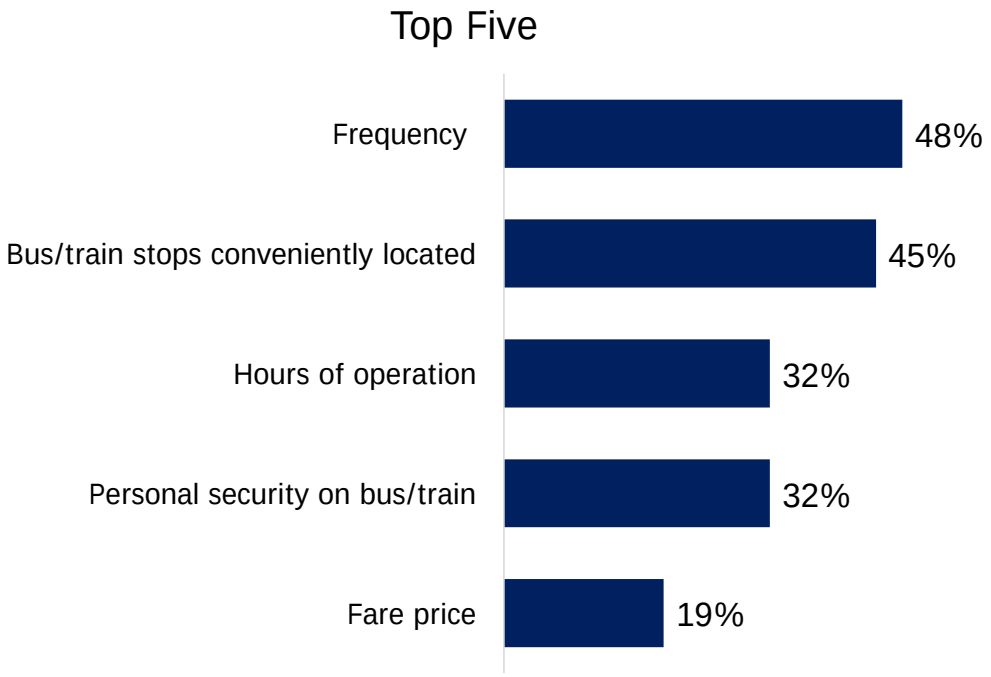
How effective do you feel RTD is at engaging with your organization?



How effective is RTD at supporting community businesses?



Factors Impacting Use



Additional factors:

6. Ease of finding out if buses/trains are running on schedule
7. Accuracy of route schedules and maps
8. Travel time
9. Timely arrival of buses/trains
10. Buses/trains being operated safely
11. Personal security while waiting for the bus/train
12. Bus/train cleanliness
13. Access to key public service destinations
14. Availability of route schedules and maps
15. Mechanical safety of bus/train
16. Transit system provides value to the community

Conclusion

Key Takeaways

- Overall satisfaction increased in 2023 compared to 2022
- Satisfaction ratings are above the national average in all areas
- Net Promoter Score declined in all modes except Commuter Rail
- Customers across all modes identified fare price as an area of opportunity (high importance and low satisfaction)
- Access to employment, affordable options, and reducing traffic congestion have highest community importance
- Community members and key business stakeholders see RTD's value to the Denver Region

We Make Lives Better Through Connections.

rtd-denver.com