

# An Onboard Survey of Transit Customers in The Triangle Region

2018



*A study conducted by:*



*In Conjunction with:*



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## Executive Summary

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## Introduction

In early October 2018, CJI Research conducted an onboard survey of transit customers of four transit systems, GoDurham, GoRaleigh, GoTriangle, and GoCary. The total number of questionnaires completed was 4,523. A random sample survey of this size, when used as a total sample, has a margin of error of +/- 1.5% at the 95% level of confidence. Sub-samples for each of the systems have higher margins noted in the individual system reports. All margin of error statistics assume a split of 50:50 in response. Margin of error is slightly lower when response proportions are unequal, as for example 60:40, 75:25, or 90:10.

### PERCEPTION OF MAJOR SERVICE IMPROVEMENTS

- The survey obtained customer ratings of overall Triangle Region service and nineteen specific elements of service. A seven-point scale was used on which a score of 1 means very poor and 7 means excellent. The percent rating Triangle Region service overall as 7, or “Excellent,” is 27%. Another 25% rated service as 6 on the same scale, meaning that the total rating service as excellent or very good is 52%.
- GoDurham (27%), GoRaleigh (28%), and GoTriangle (26%) varied very little in this top score, but GoCary was the exception with 53% offering a score of Excellent for service overall.
- Regionally, top rated elements with high percentages of scores of 6 or 7 include three aspects of service that help define the environment in which customers travel:
  - Fare medium options (60%)
  - Usefulness of printed information (60%)
  - Bus operator helpfulness (58%)
- Top rated operational aspects of service used by almost all customers include weekday service hours (55%), ease of intra-system transfer (55%), and weekday service frequency (54%). Lower percentages of positive scores were given to three other operational aspects of service, specifically service to all destinations desired (46%), buses operating on time (43%), and total duration of the trip (42%).
- When asked to rank areas for improvement:
  - "Buses running on time" is by far the most frequently cited aspect of service to improve. It was cited by 60% of customers as first, second, or third most important to improve among the nineteen specific aspects of service examined.
  - Second most important in this sense is “Service to all destinations,” i.e., coverage, (22%).
  - Third most important: Cleanliness of the bus interiors (21%).
- Another way to consider service improvement priorities is to examine the correlation of each aspect of service with the overall service rating. That technique identified five priorities that would have would have a significant impact on the overall quality of service rating. They are, in ascending order of the impact on the overall satisfaction score: Buses running on time, Service to all destinations, Total average trip time, Total average time to make a trip, service to all destination desired (coverage), cleanliness of bus interiors, and cleanliness of bus shelters and transit centers.
- Trip purpose is primarily oriented to employment (68%) and school or college (13%), but some customers (totaling 19%) also use Triangle Region transit services for shopping, medical/dental visits, recreation or other purposes.

## DEMOGRAPHICS

- Triangle Region transit systems provide key support for employment and education. Of all Triangle Region customers, 48% are employed full time and another 18% part time, for a total of 66% being employed. Another 21% are students.
- In 2018, 61% of the respondents identified as African American/Black and 22% identified themselves as Caucasian/White. Another 7% identified as Asian, 7% Hispanic and 3% Native American, and 5% as “Other”.
- Like most U.S. bus systems, the ridership of Triangle Region is young, with 49% younger than thirty-five.
- Unlike the customer base of most transit systems in the United States, a roughly similar proportion of women (47%) as men (51%) use one or more of the Triangle Region systems. (2% preferred not to answer the gender identity question.)
- Similar to the ridership of many bus systems, many Triangle Region customer households report that they have low household incomes. In this survey, 65% report income of less than \$25,000.
- Triangle Region customers are similar to the national norm in terms of having a vehicle available for their use. Nationally, 61% of bus riders say they lacked a vehicle to use for the trip they were making when surveyed. Conversely 39% had a vehicle. The Triangle Region ridership is only slightly more likely than the national ridership to have a vehicle available: 43% have vehicles available, while 57% do not.

## TRAVEL CHARACTERISTICS

- 35% of Triangle Region customers say they are using transit more often than in the previous year and another 18% say they began riding only in 2018. Only 9% say they are riding less often now. Given that ridership has not increased by 18% as the new ridership might suggest, or even more given that many customers are now riding more often, there must be very substantial churn within the ridership with almost as many ceasing to ride as are beginning to ride.

## MOBILE COMMUNICATION AND TRANSIT APPS

- Mobile Communication. A transit app has been downloaded by 45% of Triangle Region customers.
- While the use of transit apps is still very much inversely related to age, the use of basic cellphones is not. For example, 87% of customers over the age of sixty-five use a cell phone, but only 27% of that group uses a transit app. Yet, it is interesting that even in this oldest group in the survey, more than one-fourth of the customers use a transit app.

## RIDESHARING

- 44% have used Uber or Lyft at least once in the thirty days prior to the survey.
  - Of the 44% using Uber or Lyft in the previous thirty days, 72% (which amounts to 32% of all Triangle Region customers) used Uber or Lyft to replace a Triangle Region trip.
  - Of that same 44% who have used Uber or Lyft at least once in the past thirty days, 43% (or 19% of all customers) have used them as part of a Triangle Region trip.

## FARE MEDIA

- Region-wide, the day pass, either purchased on the bus (19%) or before boarding (12%), for a total of 31%, is the most widely used fare medium. Cash fare, at 28%, is the second most used fare medium. Longer term passes for 7 or 31 days are used by 12%, while a university ID or a GoPass is used by 9% and 19%, respectively.