

2012
**Metrolink Customer Satisfaction Survey
and Metrolink Market Study Results**



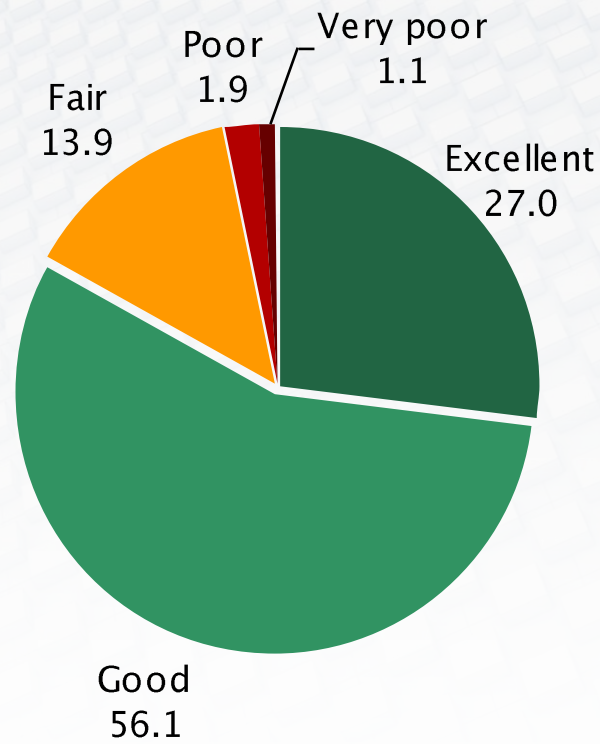
Overview

Two surveys were conducted for Orange County:

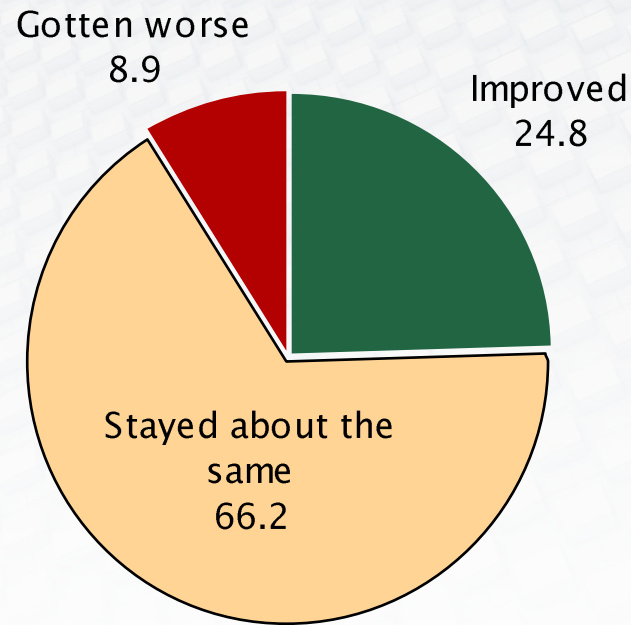
- **Metrolink Customer Satisfaction Survey**
 - Onboard survey
 - Measure customer satisfaction
 - Identify desired service improvements
 - Explore opportunities to increase frequency of ridership
- **Metrolink Market Study**
 - Telephone/online survey
 - Measure awareness and perceptions of Metrolink
 - Identify perceived barriers to riding Metrolink
 - Profile potential markets for increasing ridership

Metrolink Customer Satisfaction Survey Key Findings

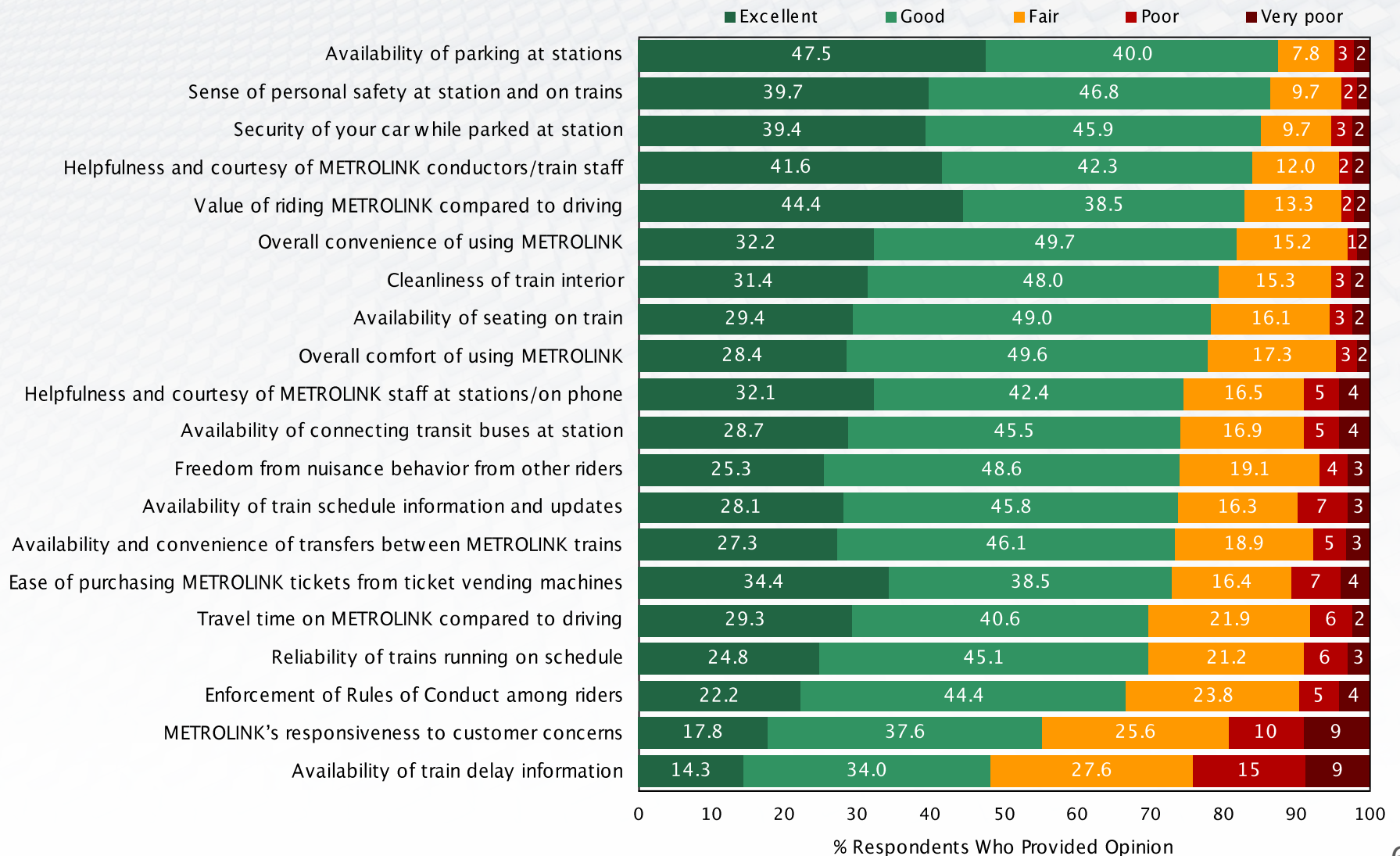
Customer Satisfaction



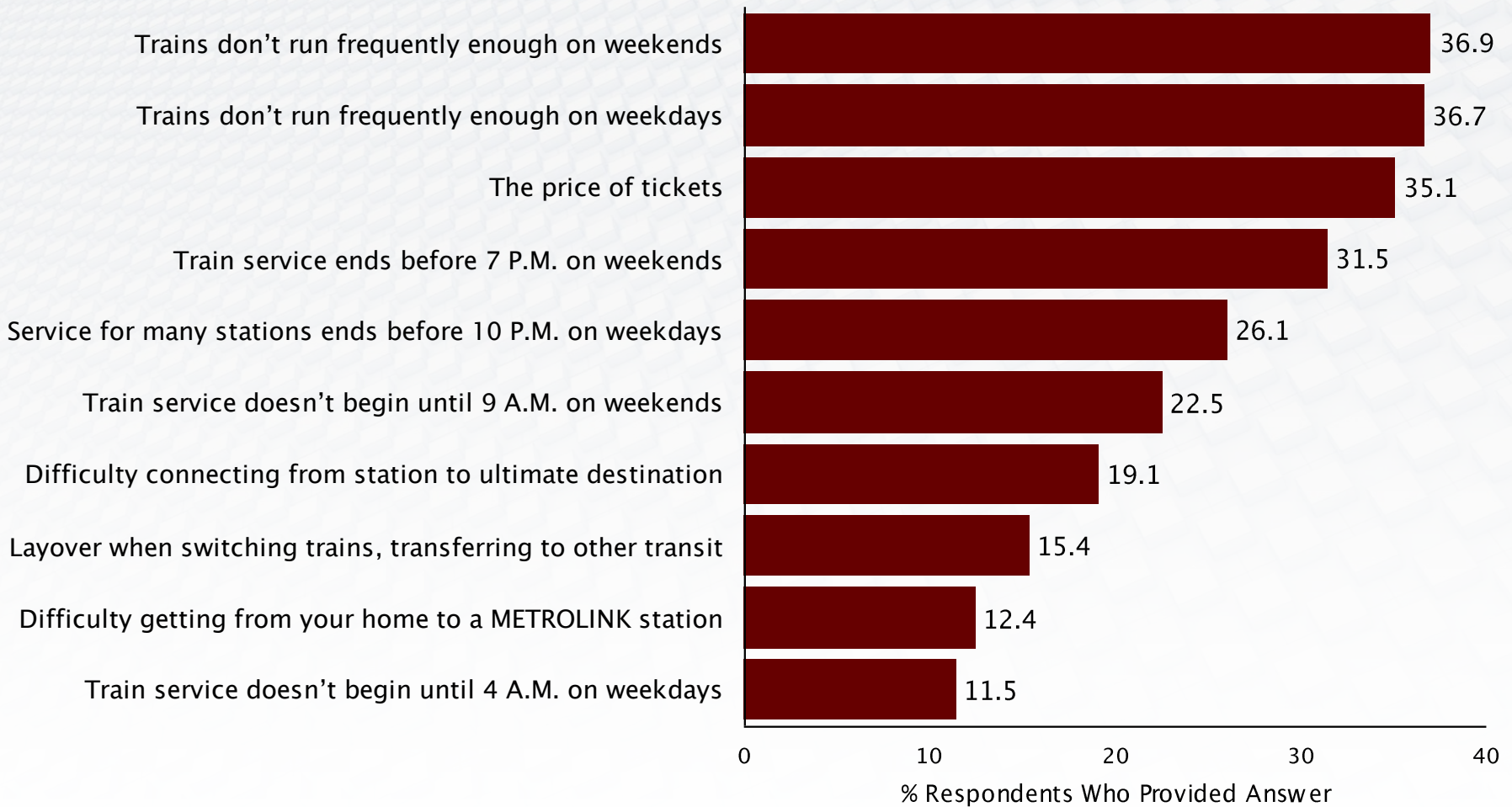
Quality of Service Over Time



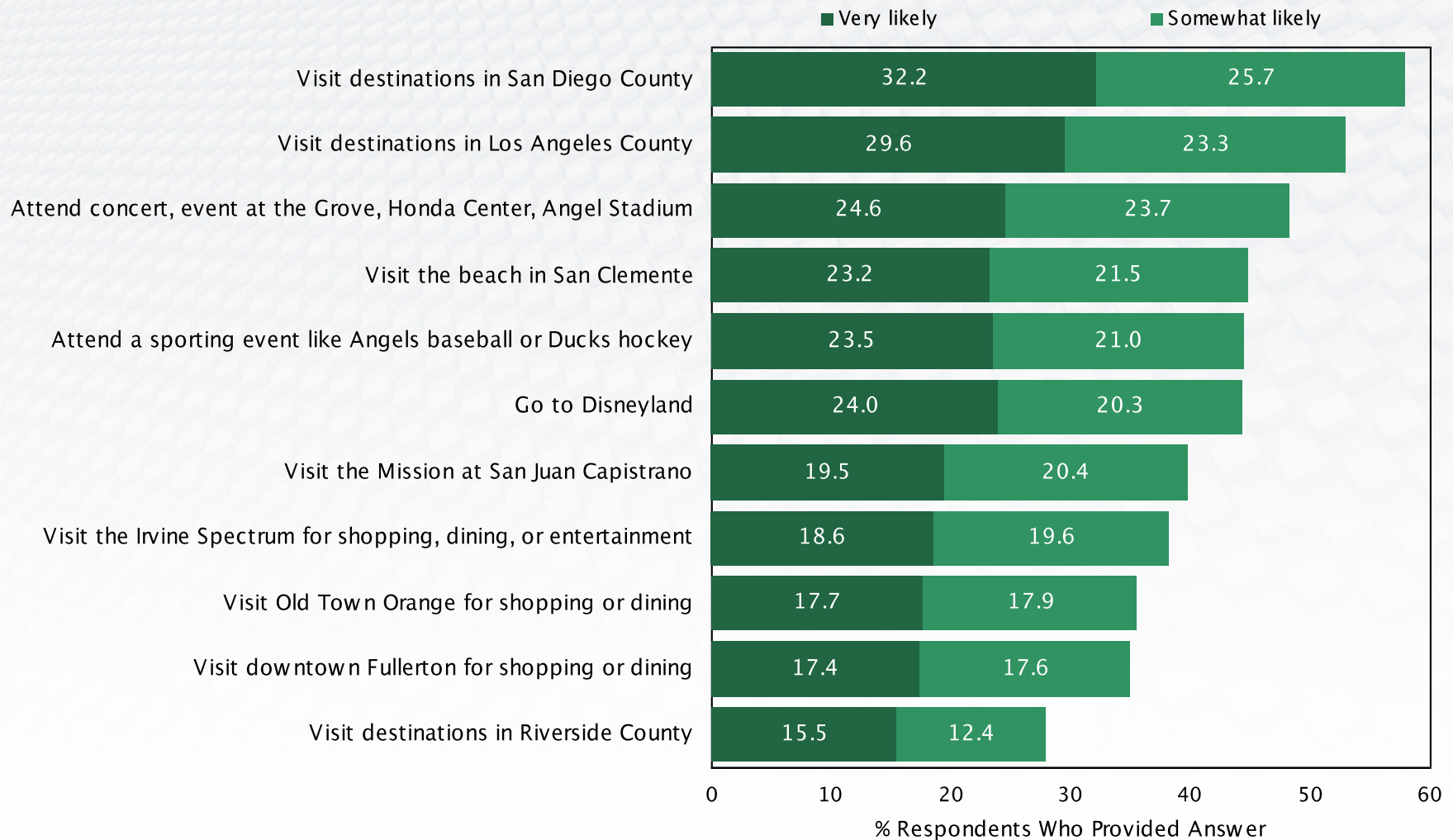
Rating of Metrolink Performance



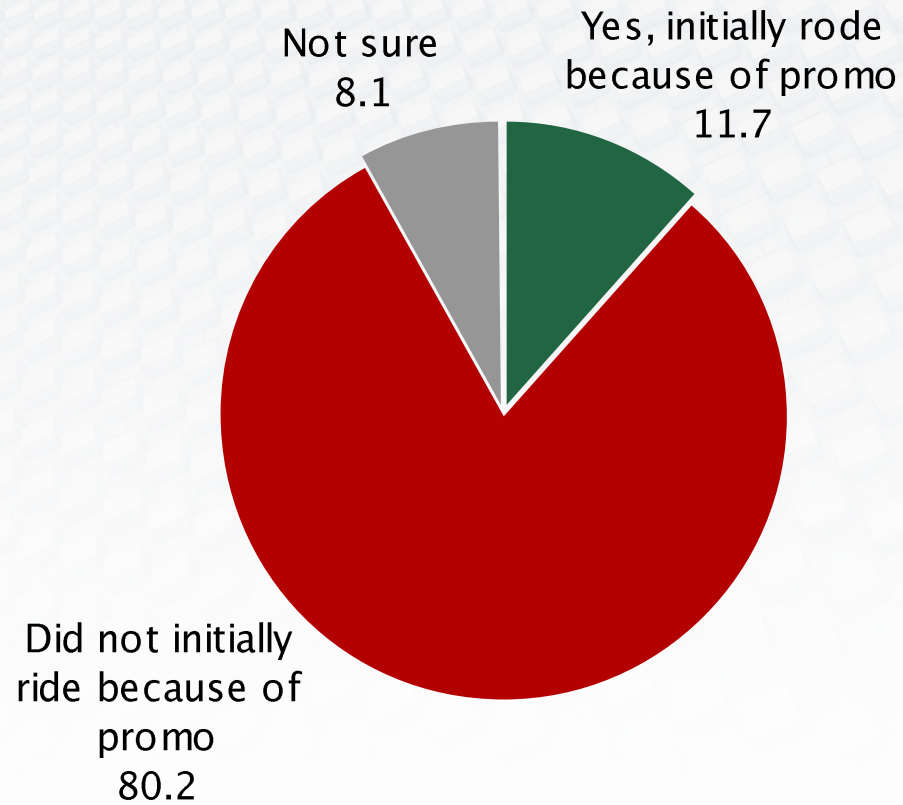
Obstacles to Increasing Ridership



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

Employment Status

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

Ethnicity

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

Annual Household Income

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

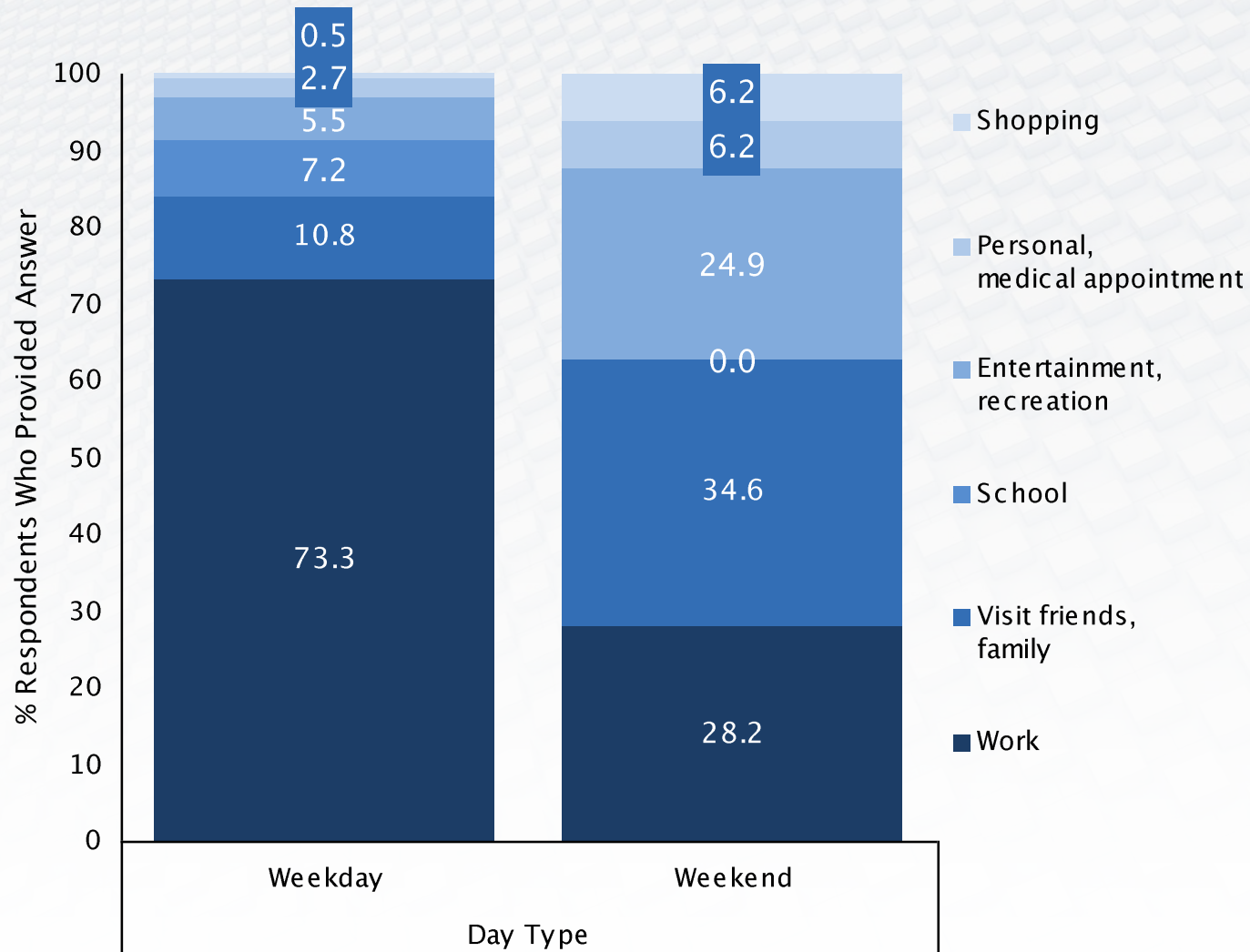
Age

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

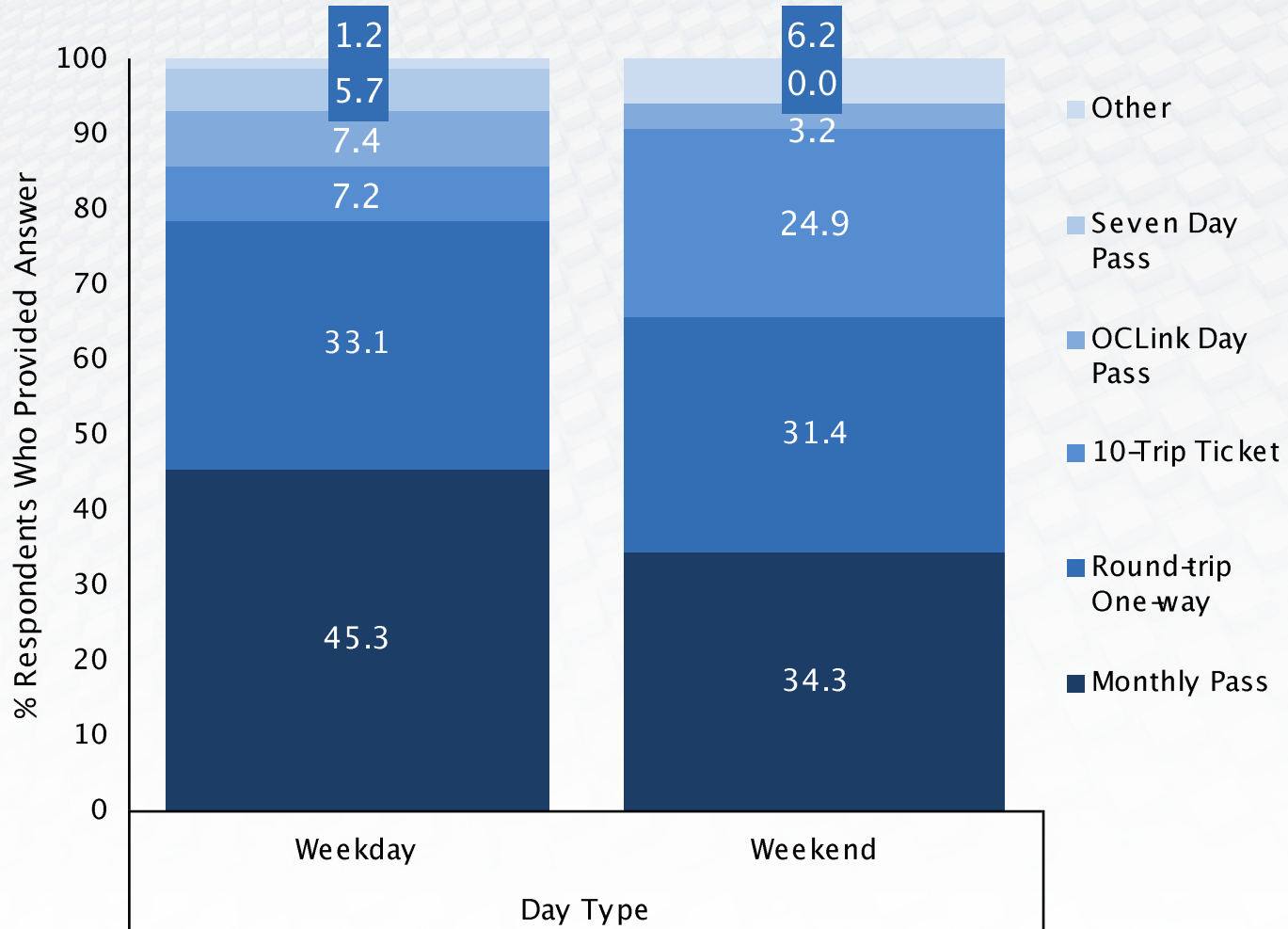
Access to Personal Vehicle

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

Purpose of Current Trip

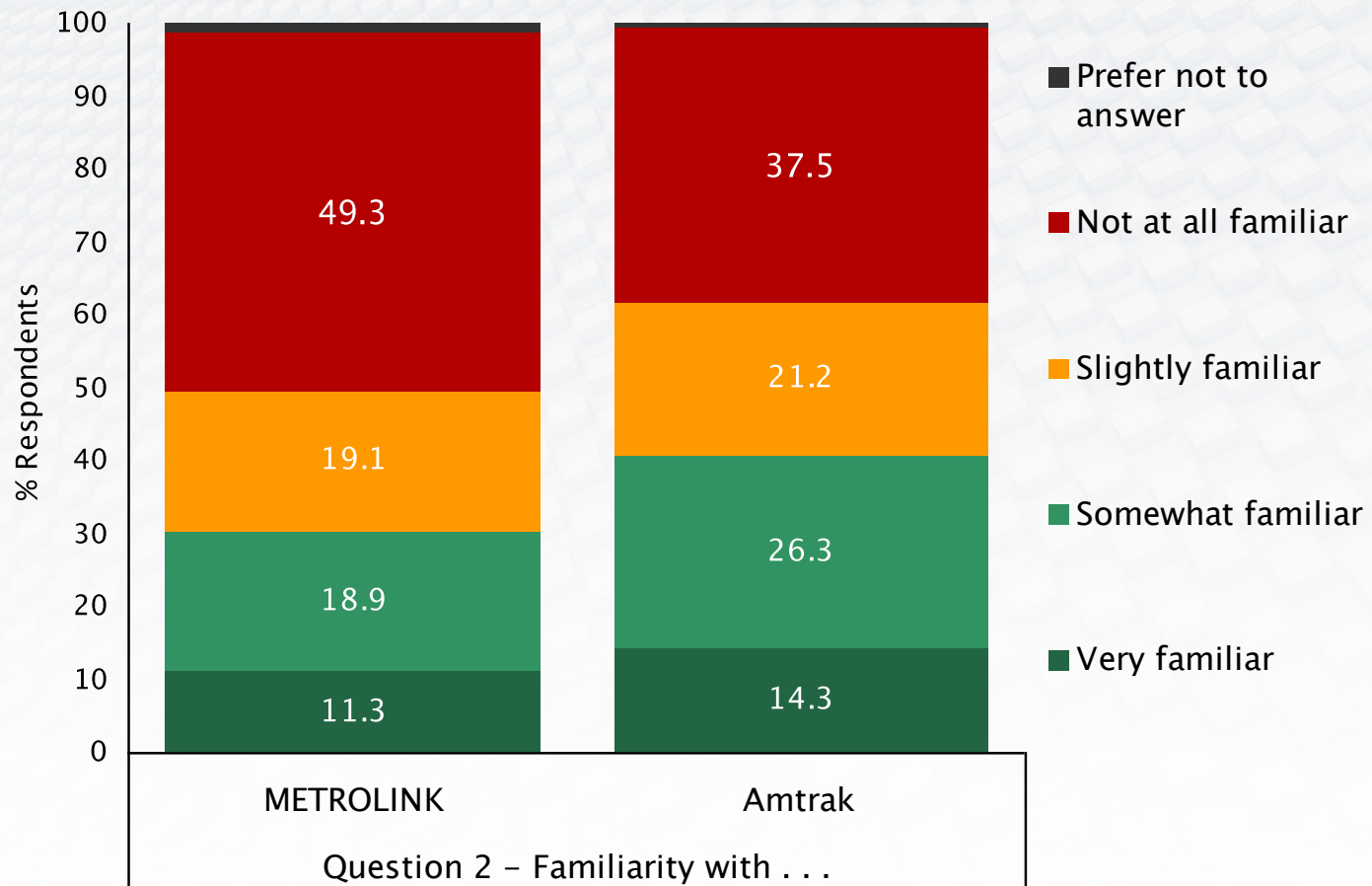


Fare Type for Current Trip

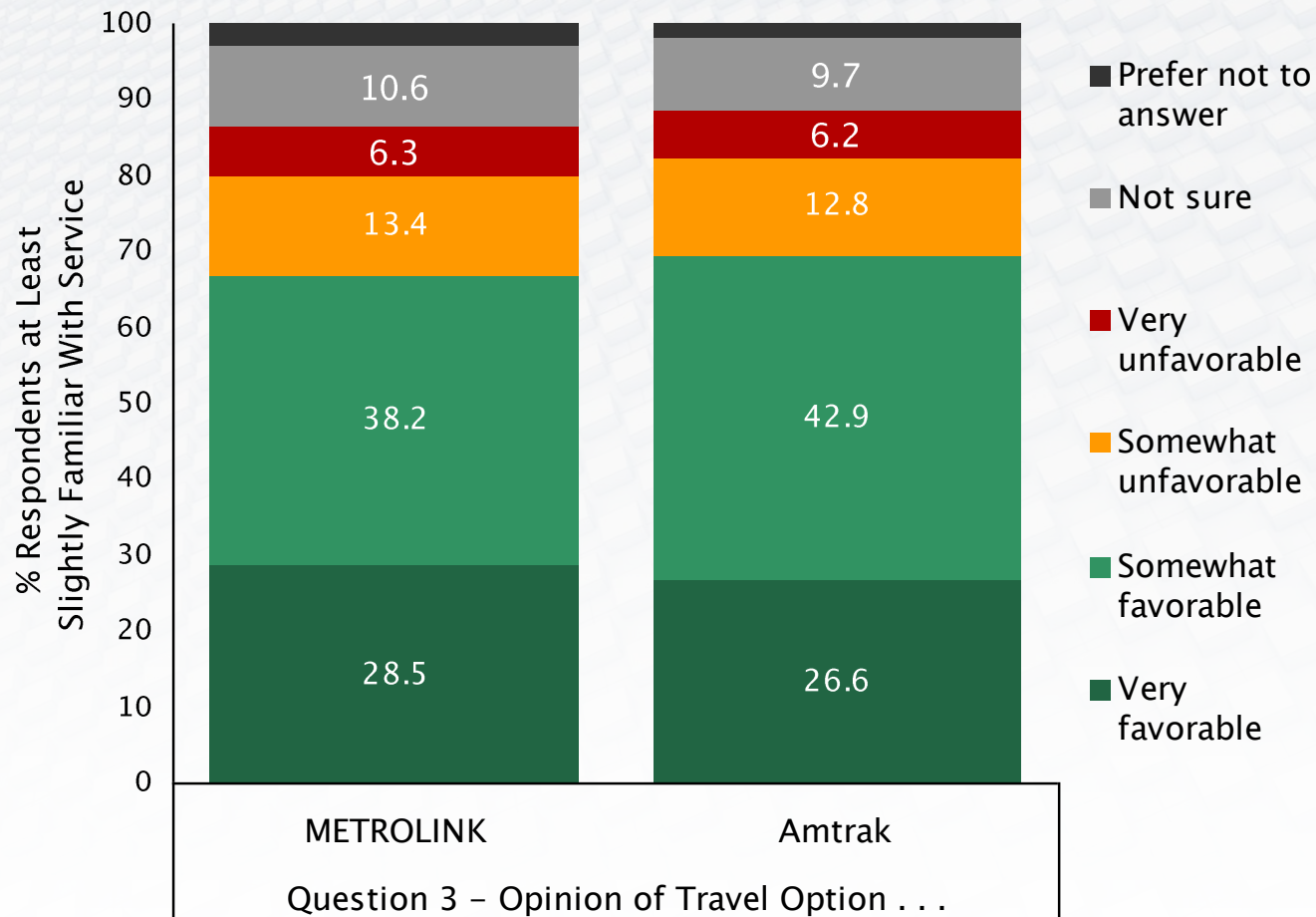


Metrolink Market Study Key Findings

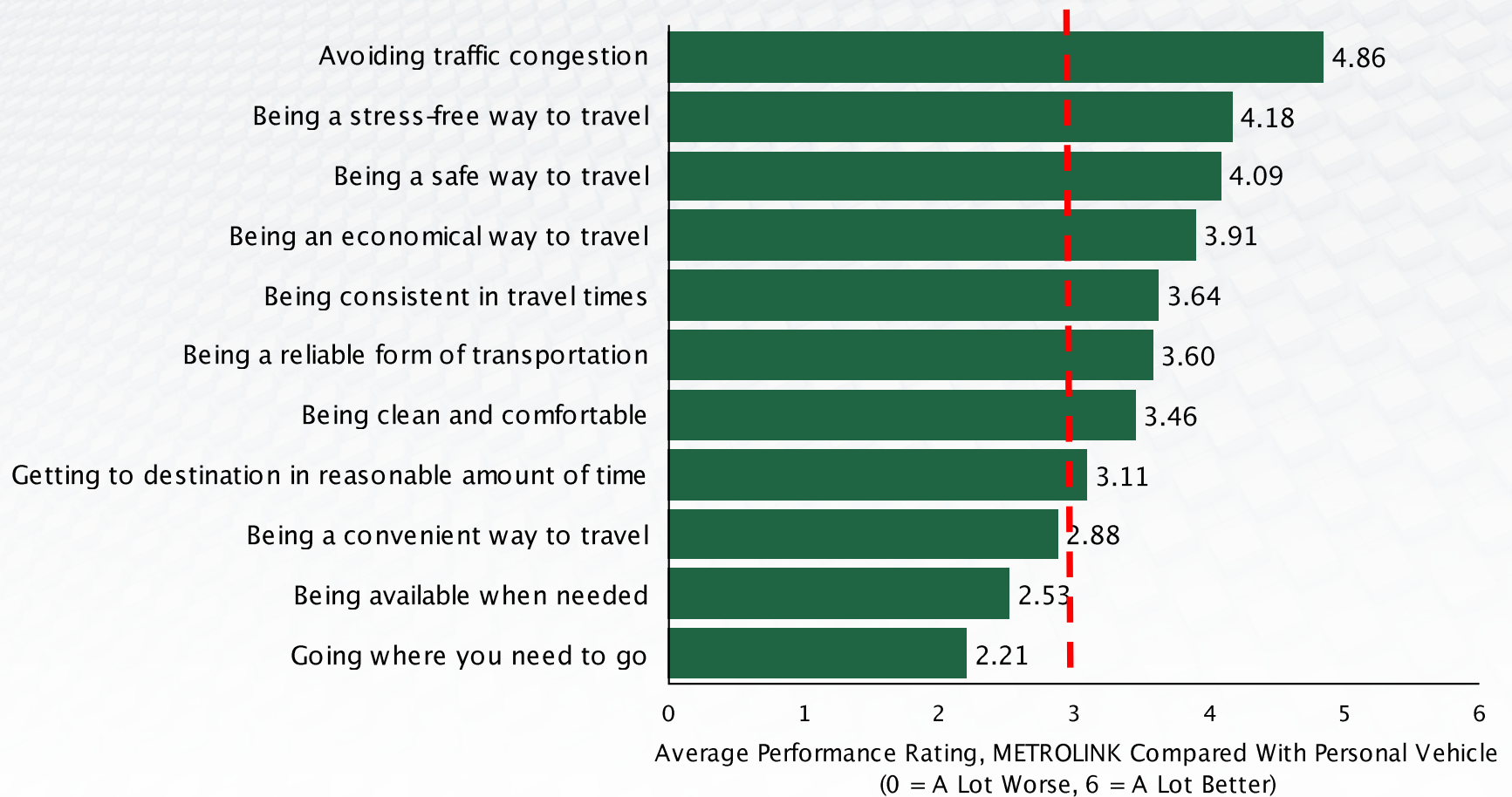
Familiarity with Metrolink



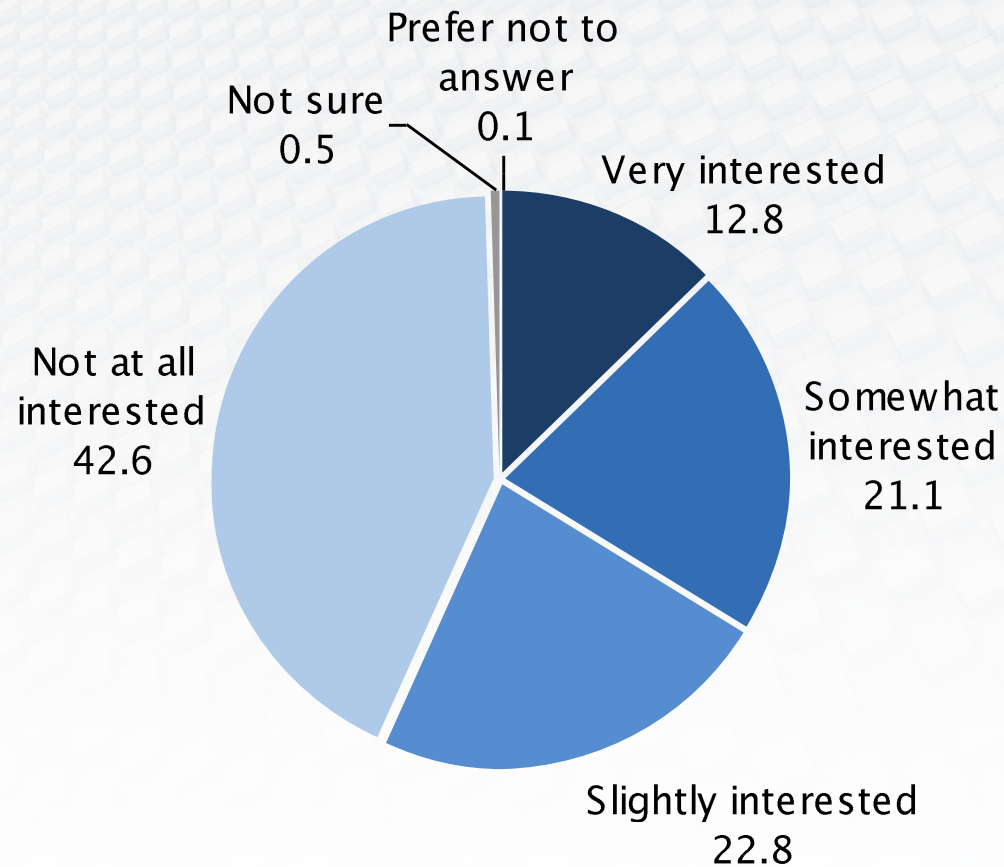
Opinion of Metrolink as Travel Option



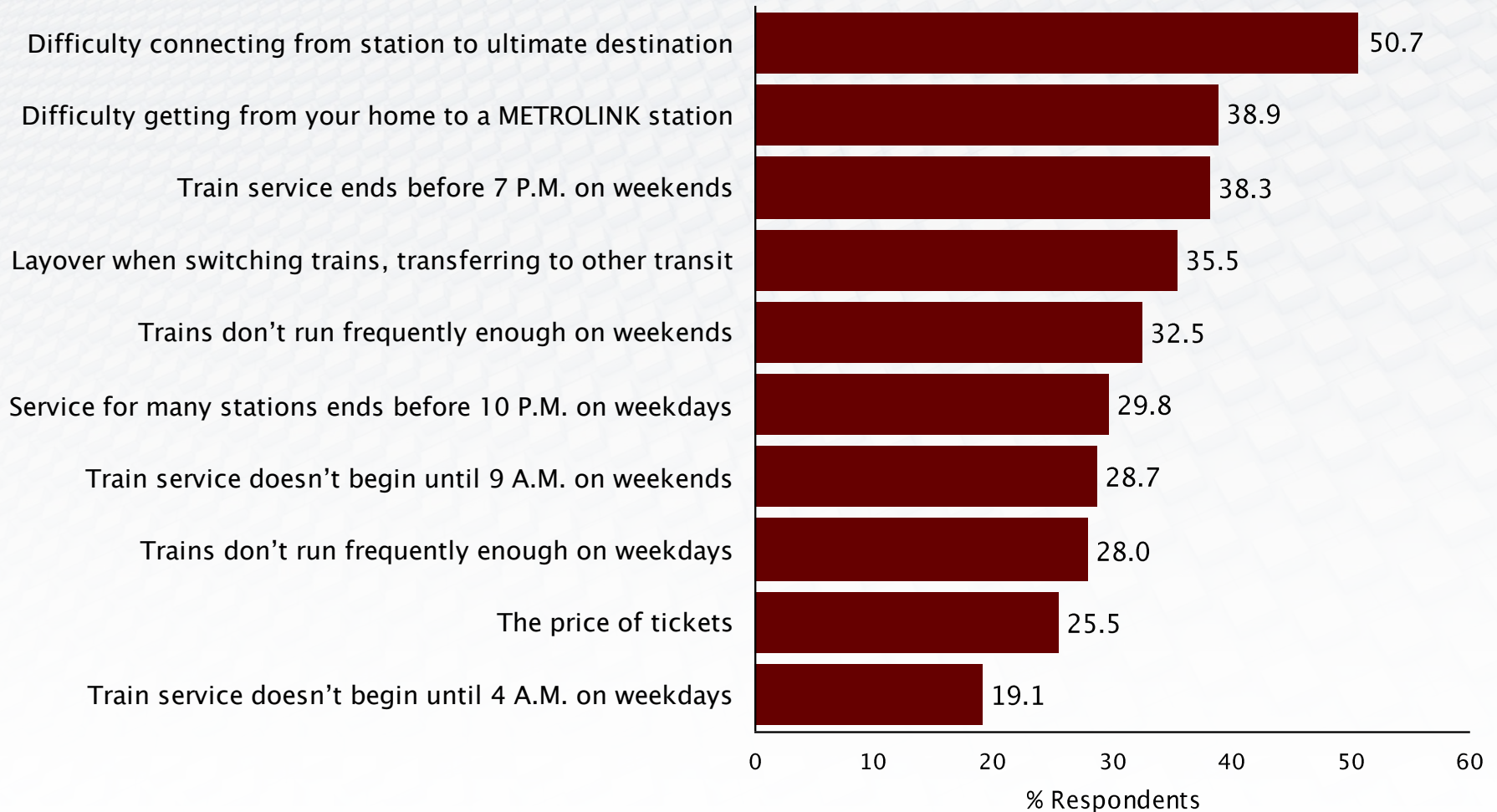
Metrolink vs. Personal Vehicle



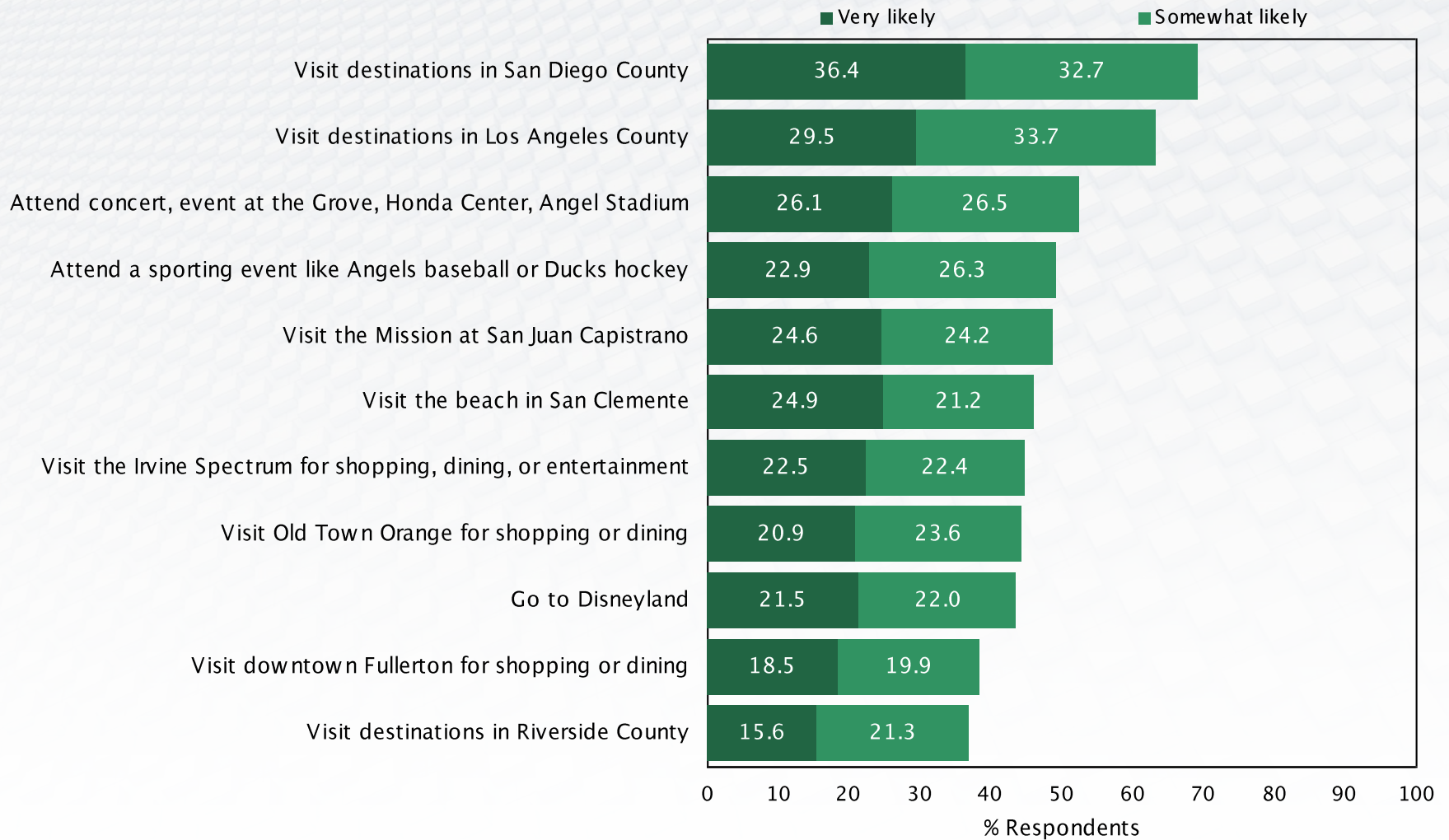
Interest in Riding Metrolink



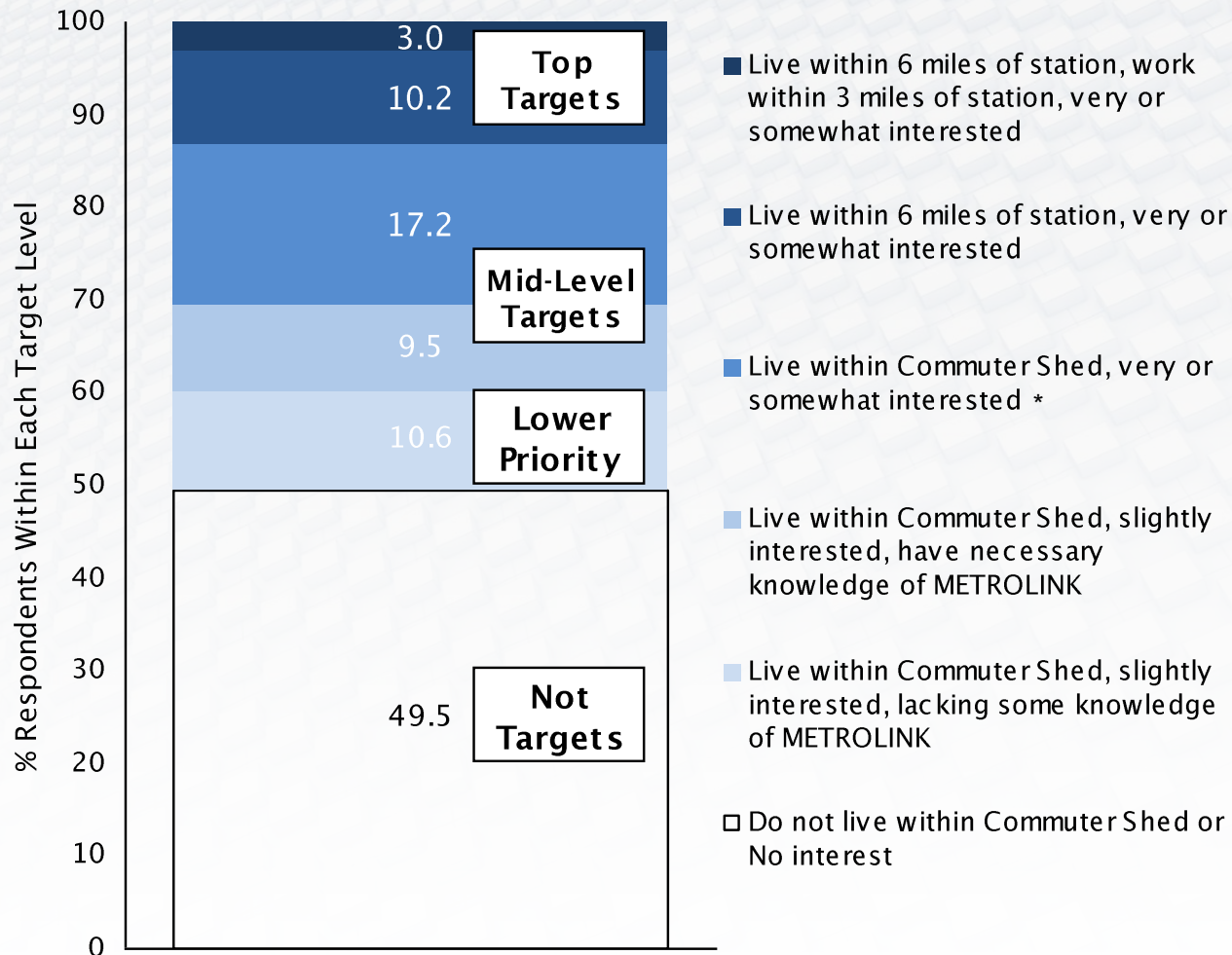
Obstacles to Riding Metrolink



Likelihood of Using Metrolink

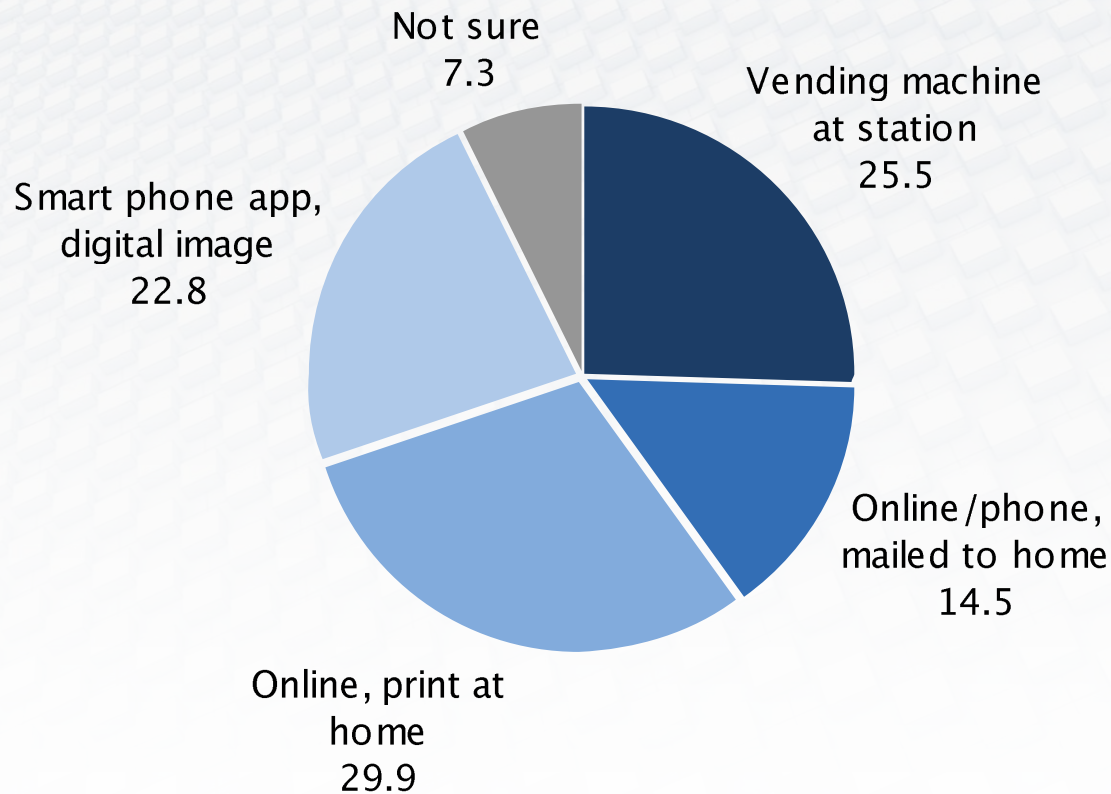


Potential Metrolink Market



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

Fare Media Purchasing Preferences



Next Steps

Area	Recommended Actions
Weekend Service	<ul style="list-style-type: none"> • Promote new weekend service that is effective July 2012, monitor ridership
Weekday Service (Later Evening)	<ul style="list-style-type: none"> • Continue to evaluate Metrolink Service Expansion Program and make adjustments to build ridership
Special Event Service (Orange County)	<ul style="list-style-type: none"> • Primary markets are services to events at the Honda Center, The Grove, Angel Stadium • Further define demand, schedules, and cost
Service to San Diego County	<ul style="list-style-type: none"> • Develop run-through trains to San Diego
First and Last Mile (Connections)	<ul style="list-style-type: none"> • Implement a bike share pilot program • Implement station van program • Continue to assess Station Link bus service
Targeted Marketing	<ul style="list-style-type: none"> • Develop targeted marketing plans to stimulate trial and build frequency of use • Consider trip purpose, demographics, and origin/destinations
Destination Partnerships (Weekend and Off-peak)	<ul style="list-style-type: none"> • Expand destination partnerships and promotions, i.e. Coaster, North County Transit District, Disney, Los Angeles destinations, etc.
Train Delay Information	<ul style="list-style-type: none"> • Improve availability of train delay information • Explore real-time customer information systems
Ticketing	<ul style="list-style-type: none"> • Research smart phone ticketing options