Metro Transit
Potential Rider Study

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Project Goal

Identify the size and understand more fully the overall **potential rider market** and key sub-segments of the potential rider market in the Greater Minneapolis/St. Paul MSA.

Identifying the Potential Rider Market

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From the broadest
and most optimistic perspective,
how many people make up
Metro Transit's Potential Rider
Market?

Using Marketing Filters to Identify the Potential Transit Rider Market

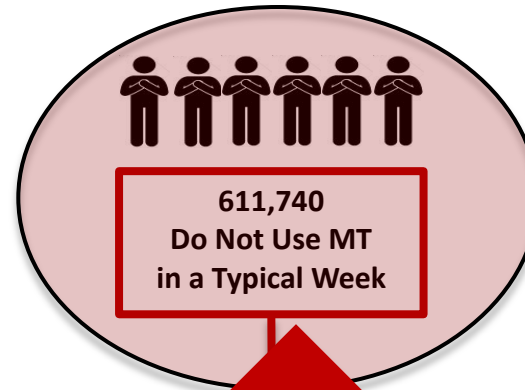Adults 18+ who live in the area

Must be a "regular traveler"

Do not ride Metro Transit regularly now

Are currently an SOV driver
(we are not interested in breaking up a carpool)

Would consider riding transit in the future

The Potential Transit Rider

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Metro Transit's Potential Rider Market

611,740
Do Not Use MT
in a Typical Week

611,740 Potential Riders Make Up Metro Transit's

Potential Rider Market.

Approximately 28% of the Metro area adult population 18+.

(In this study a sample size of 1,069)

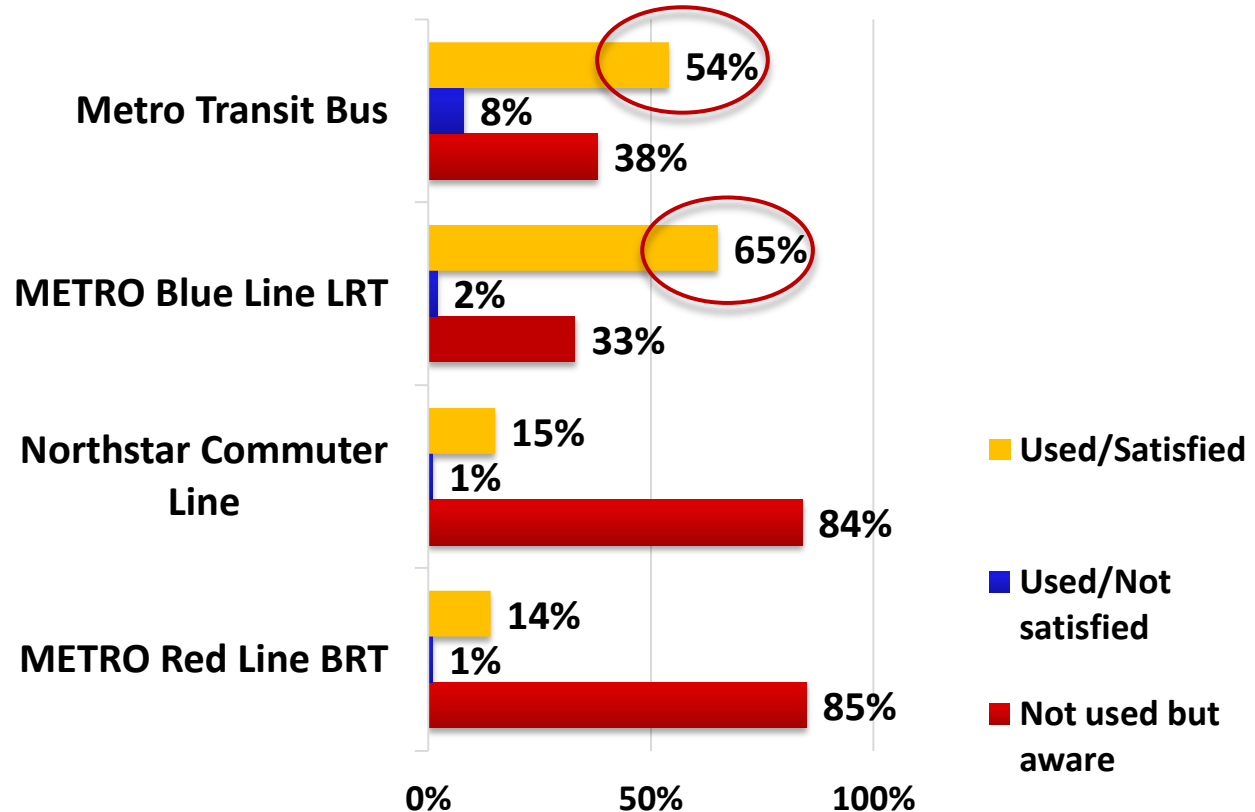= 100,000 people

Key Insights Into Converting Potential Riders

1

Many Potential Riders have had past experience with Metro Transit and have been satisfied with their experiences.

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Few Potential Riders Who Have Used Metro Transit Services Have Been Dissatisfied

Metro Transit Bus
- 54%
- 8%
- 38%

METRO Blue Line LRT
- 65%
- 2%
- 33%

Northstar Commuter Line
- 15%
- 1%
- 84%

METRO Red Line BRT
- 14%
- 1%
- 85%

Legend:
- Used/Satisfied
- Used/Not satisfied
- Not used but aware

X-axis: 0% 50% 100%

n = 1,069

Those aware:
MT Bus: 1003
METRO BL: 792
Northstar: 741
METRO RL: 254

Q9. Below is a list of transportation options offered by Metro Transit. Which of the following best describes your experience with each?
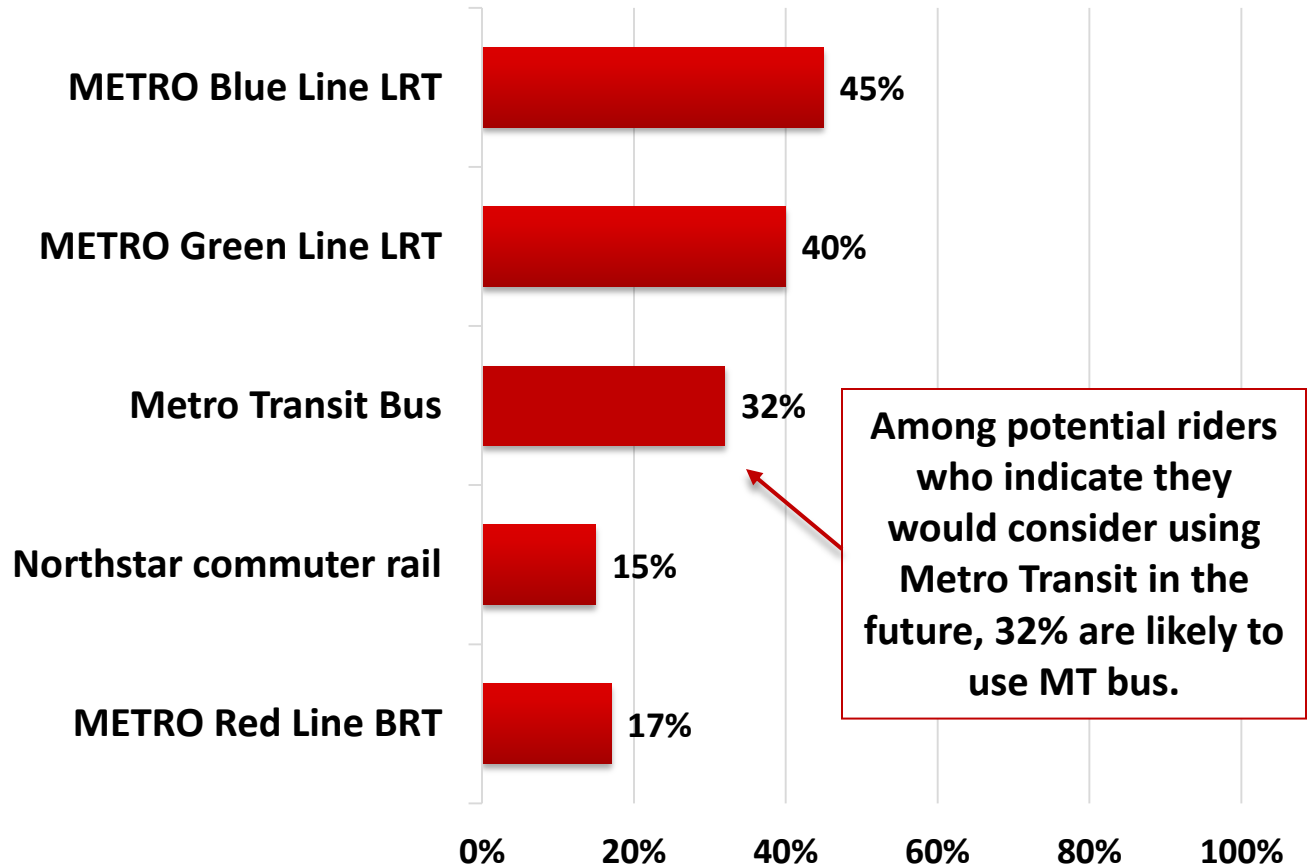
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Potential Riders Considering Future Transit Use Are Most Likely to Use Light Rail

* Defined as rating a 4 or 5 on S4: On a scale of 1 to 5, with 1 being "Definitely would not consider" and 5 being "Definitely would consider", how likely are you to consider increasing your use of Metro Transit public transportation in the future?

n = 1,069 Potential Riders

n = 416 Likely Future Transit Use

METRO Blue Line LRT — 45%

METRO Green Line LRT — 40%

Metro Transit Bus — 32%

Northstar commuter rail — 15%

METRO Red Line BRT — 17%

0% 20% 40% 60% 80% 100%

Among potential riders who indicate they would consider using Metro Transit in the future, 32% are likely to use MT bus.

Q11. For all Metro Transit options familiar, On a scale of 1 to 5, with 1 being "Very Unlikely" and 5 being "Very Likely", how likely are you to use the following Metro Transit options in the future?

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Recommendation

Recognize and celebrate the positive association public transportation, as a service concept, has in the Minneapolis / St. Paul market. You do not have to overcome the old *"transit dependent"* service label.
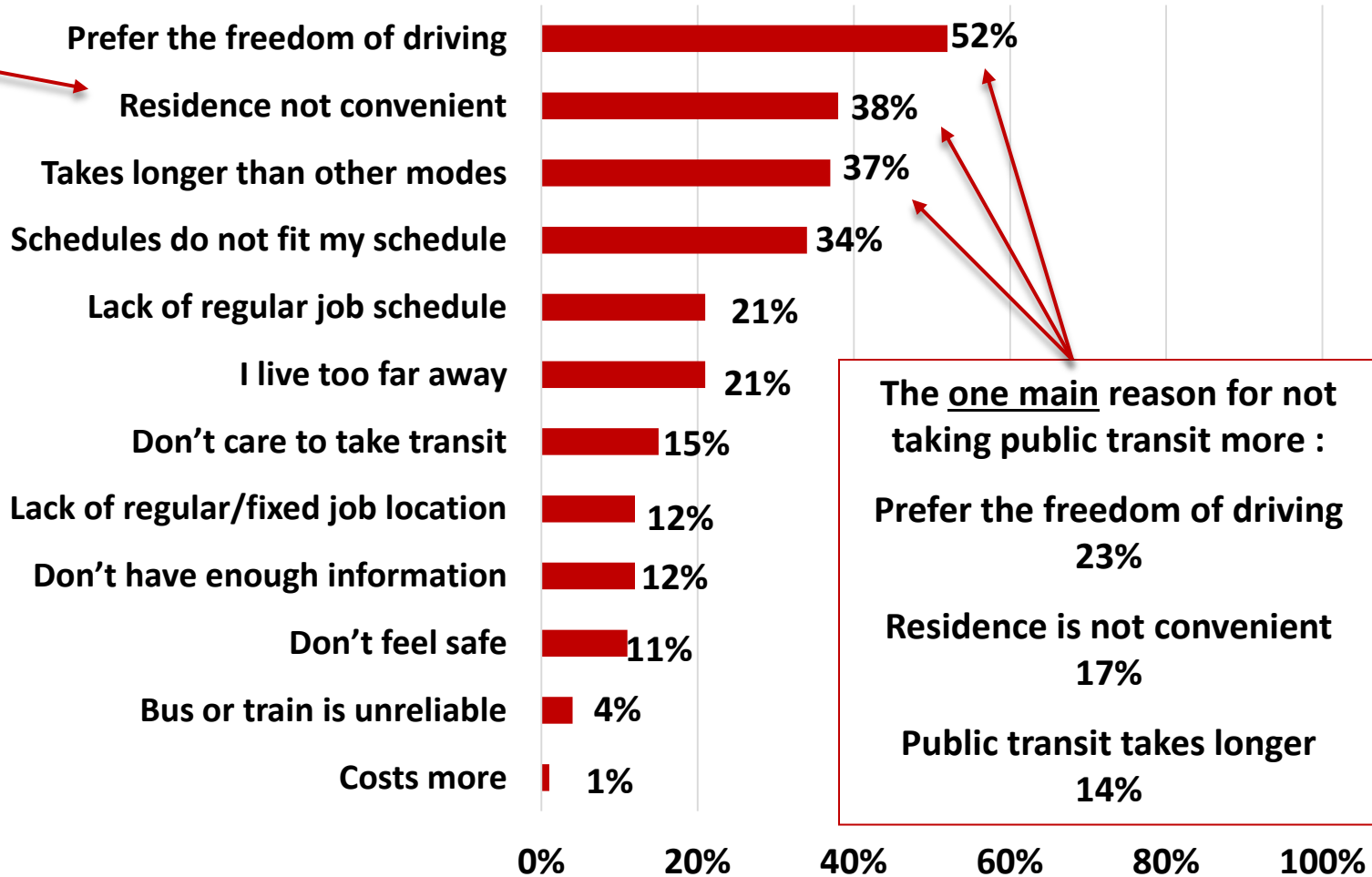
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2

There are several barriers to greater "consideration and trial" of transit.

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Many Potential Riders Do Not Take Transit Due to Need for Freedom and Convenience

Comparatively, only 18% of those who live within 5 blocks of a stop consider that their residence is not convenient.

Note that barriers are similar across all potential rider segments, generational and current use behavior.

n = 1,069

Reason	Percentage
Prefer the freedom of driving	52%
Residence not convenient	38%
Takes longer than other modes	37%
Schedules do not fit my schedule	34%
Lack of regular job schedule	21%
I live too far away	21%
Don't care to take transit	15%
Lack of regular/fixed job location	12%
Don't have enough information	12%
Don't feel safe	11%
Bus or train is unreliable	4%
Costs more	1%

The one main reason for not taking public transit more :

Prefer the freedom of driving 23%

Residence is not convenient 17%

Public transit takes longer 14%

Q25. What reasons, if any, do you have for not taking public transit more often? Please select all that apply. Q26. **Note: Show all reasons selected in Q25,** What is your <u>one main</u> reason for not taking public transit more often?

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Recommendation

Express the benefits of transit in a manner that reinforces *"freedom of mobility"* – goes everywhere you want to go – (convenient, fits personal schedules, etc.).

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3

There are several motivators that could increase consideration and trial of public transportation.

Potential Riders Are Motivated by Opportunities That Would Expedite Public Transit Travel
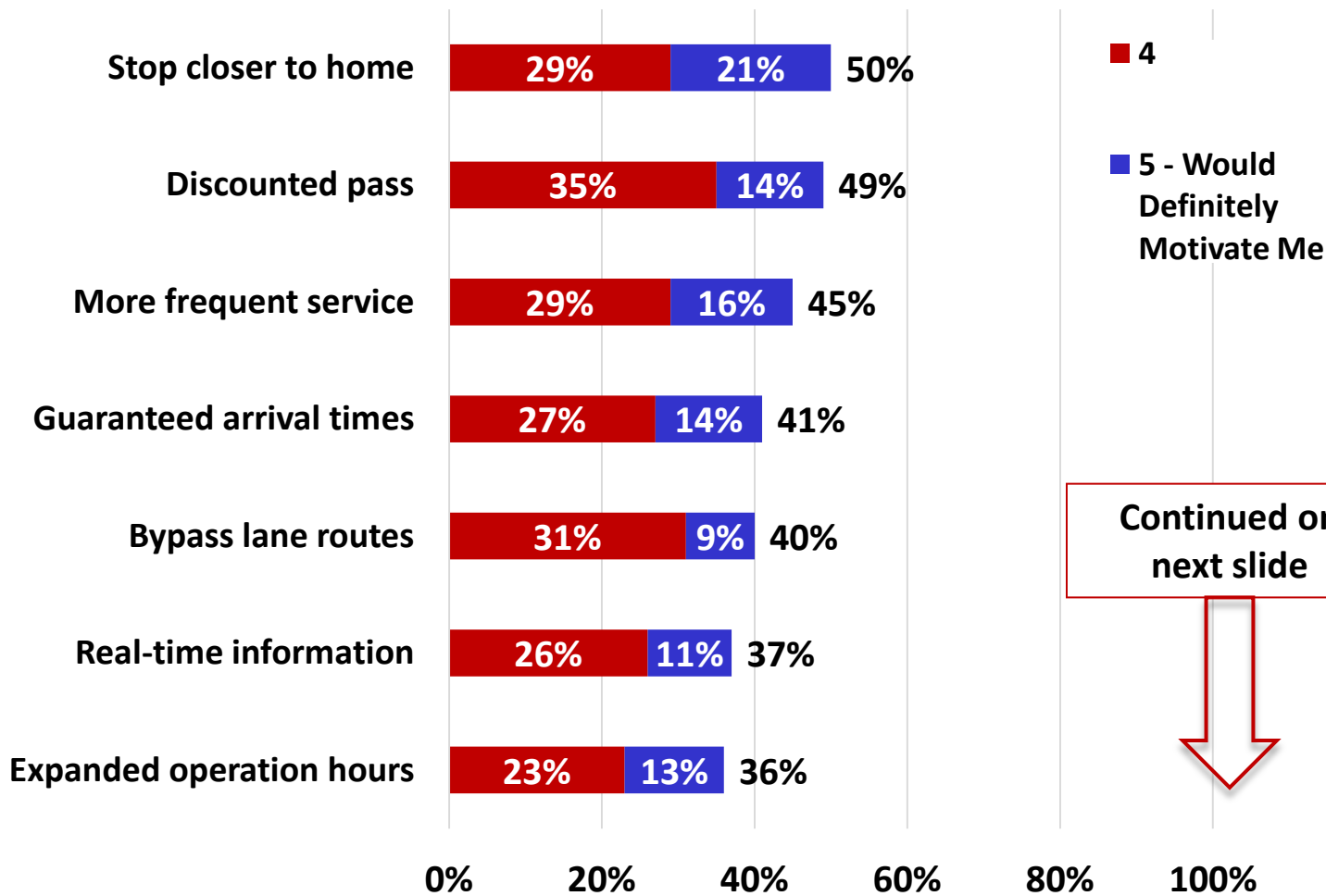
■ 4

■ 5 - Would Definitely Motivate Me

	4	5	Total
Stop closer to home	29%	21%	50%
Discounted pass	35%	14%	49%
More frequent service	29%	16%	45%
Guaranteed arrival times	27%	14%	41%
Bypass lane routes	31%	9%	40%
Real-time information	26%	11%	37%
Expanded operation hours	23%	13%	36%

0%   20%   40%   60%   80%   100%

Continued on next slide

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Q28. Which of the following would motivate you to ride public transit more often?
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SiR
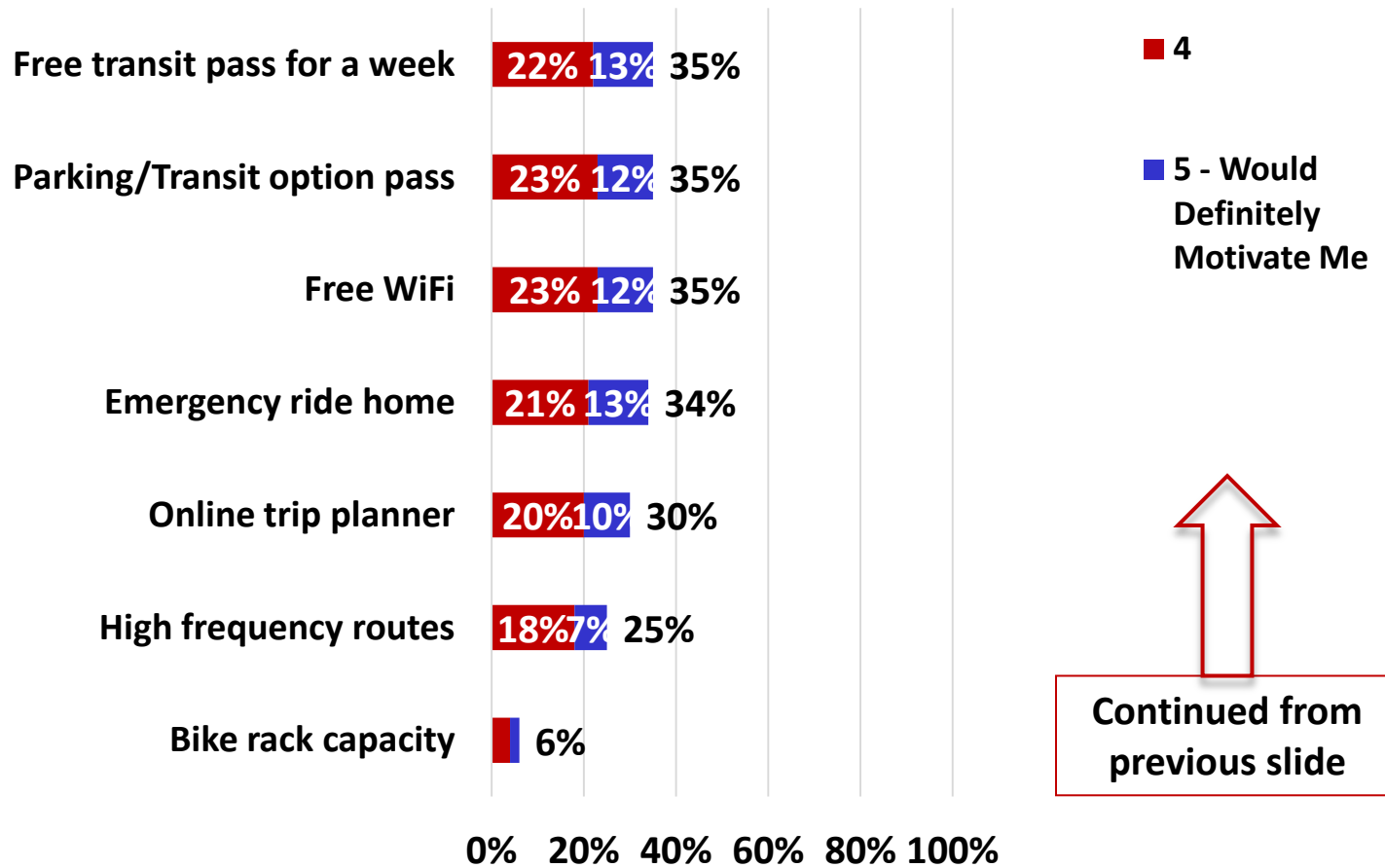Southeastern Institute of Research

On Average, Potential Riders Consider Five or More Potential Offerings to be Motivation to Ride Public Transit More Often

Free transit pass for a week 22% 13% 35%

Parking/Transit option pass 23% 12% 35%

Free WiFi 23% 12% 35%

Emergency ride home 21% 13% 34%

Online trip planner 20% 10% 30%

High frequency routes 18% 7% 25%

Bike rack capacity 6%

0% 20% 40% 60% 80% 100%

■ 4

■ 5 - Would Definitely Motivate Me

Continued from previous slide

Q28. Which of the following would motivate you to ride public transit more often?
.

n = 1,069
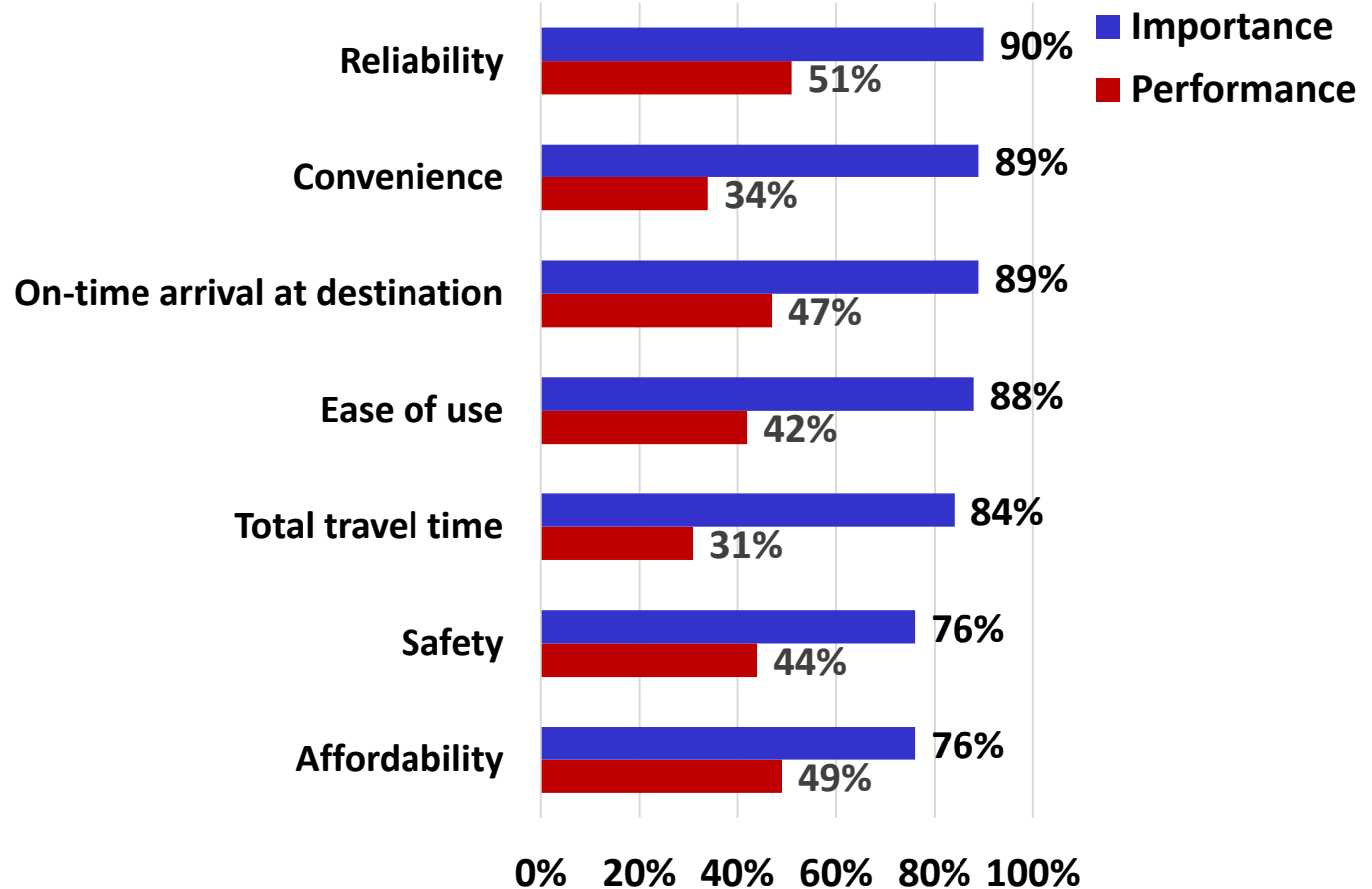
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Recommendation

There is no one silver bullet regarding motivating people to use transit services. However, potential riders are most motivated by service improvements and saving money.

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4

Metro Transit can improve perceptions around its service delivery.

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There Are Significant Gaps in Perceived Performance on all Factors Considered to be Critically Important

Top seven attributes, all receiving Importance ratings of 75% or greater.

Note: Rating was on a 1 to 5 scale, where:

1 = Not at all Important
5 = Most Important

1 = Poor
5 = Excellent

n = 1,069

■ Importance
■ Performance

Attribute	Importance	Performance
Reliability	90%	51%
Convenience	89%	34%
On-time arrival at destination	89%	47%
Ease of use	88%	42%
Total travel time	84%	31%
Safety	76%	44%
Affordability	76%	49%

0% 20% 40% 60% 80% 100%

Q18. When selecting a mode of travel, what considerations are most important? Please rate the importance of each of the following.
Q23. Based on your personal experience, or what you may have heard, how would you rate Metro Transit's performance on the following attributes?

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Areas of Opportunity Revolve Around Timing and Convenience

Importance →

Performance →

GROWTH OPPORTUNITY	BUILD, MAINTAIN & PROMOTE
• Convenience • Total travel time • Ease of use	• Reliability • On-time arrival • Safety • Affordability • Traffic avoidance
SAVE RESOURCES • Opportunity for social interaction • Health benefits • Low stress • Clean stations	**RESERVE STRENGTH** • Saves money • Productive commute time • Environmentally friendly

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The Mobility Hierarchy of Needs

Tertiary Mobility Needs
Aesthetic and Optional

The journey is relaxing and fulfills personal desires
(e.g. helping the environment)

Secondary Mobility Needs
Social and Affective

Independence, control, be seen as "normal"

Primary Mobility Needs
Practical and Utilitarian

Get from A to B as safely, reliably, cheaply and comfortably as possible
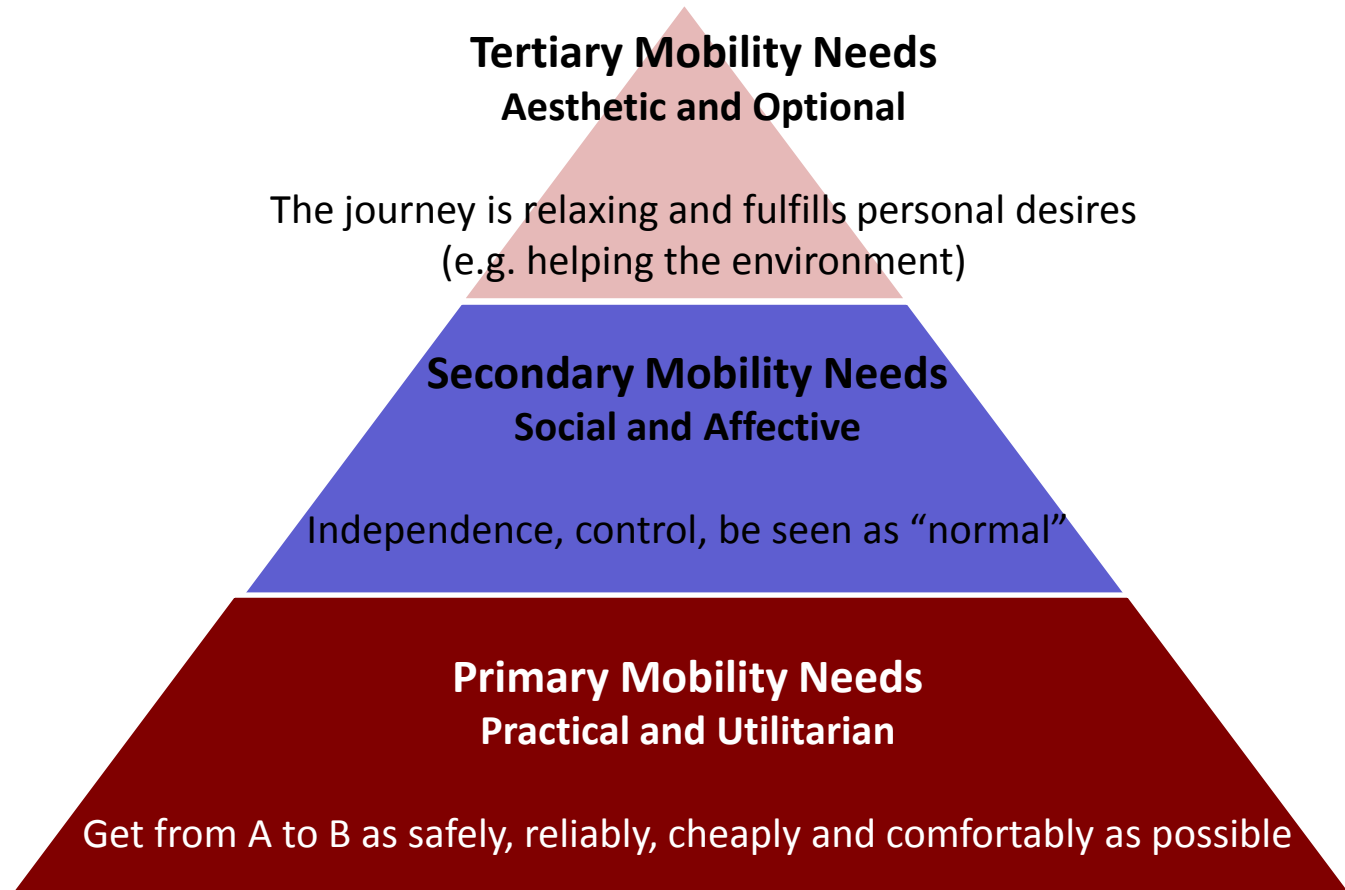
Recommendations

Messaging should reinforce convenience, reliability, travel time, ease of use, and safety.

Potential Rider Sub-Segments

Occasional Potential Rider Sub-Segment

Highest Potential Rider Sub-Segment

Generational Sub-Segments

Sizing Metro Transit's Market
Five Different Ways to Size the Opportunity Market

28% of the population equates to 611,740 potential riders. Applying additional filters yields more conservative potential market sizes.

611,740
Do not use MT
in a typical week

1 *Of the 611,740*
464,922
Have used MT in past and satisfied

2 *Of the 611,740*
318,105
Live w/in 5 Blocks of transit

3 *Of the 611,740*
269,166
Say they are likely to use MT in future

4 *Of the 611,740*
226,344
Have used MT in past and satisfied and are likely to use in future

5 *Of the 611,740*
134,583
Have used MT in past and satisfied, and are likely to use MT in future, and live w/in 5 blocks of transit

= 100,000 people

25

Sizing Metro Transit's Market
High Potential Non-riders

611,740 total potential riders in the metro area.

Of those, 22%, or 134,583 are categorized as the highest potential future users.

13% are estimated to be occasional riders, and 87% are non riders

611,740
Do Not Use MT
in a Typical Week

The following section will focus exclusively on the opportunity market of 134,583 highest potential riders who represent 6% of the metro area adult population 18+.

Sample size is 179.

Past and Satisfied

of Transit

to Use MT in Future

Of the 611,740
226,344
Have Used MT in Past and Satisfied <u>and</u> Are Likely to Use in Future

Of the 611,740
134,583
Have Used MT in Past and Satisfied, <u>and</u> Are Likely to Use MT in Future, <u>and</u> Live w/in 5 Blocks of Transit

= **100,000 people**

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Example of how to read this chart:

Millennials account for 34% of the High Potential non-Rider segment.

Summary of Rider Use Segments By Generation

	Potential Non-riders n = 1069	High Potential Non-riders n = 179	Occasional Riders n = 154
Millennials	28%	34%	34%
Genx	39%	32%	46%
Boomer	22%	26%	12%
Silent	11%	8%	8%
Total	100%	100%	100%

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Considerations for Prioritizing Opportunities and Next Steps

1. Basic mobility needs must be addressed before focusing on higher level esoteric needs.

2. Identify and redouble efforts to promote "best in class" service.

3. Realizing that Millennials are the largest and fastest growing segment of the High Potential non-riders, implement marketing efforts that address their specific barriers and motivators.

4. Distinguish between real and perceived barriers. While real concerns, such as routing, may need to be addressed through actual changes, perceived barriers, such as overall safety on transit, can be addressed through planned media and messaging.

5. Nearly half of metro area adults either use transit today or are open to using it in the future.

Questions?