

RIDERSHIP

As transit ridership is declining nationwide and slowing its growth in King County, some external factors such as lower fuel costs, increased teleworking, higher car ownership, and the rise of alternatives such as Uber and Lyft are contributing to this trend. Closer to King County Metro's sphere of influence are factors of service, safety, and real time information that pose real and identified challenges to growing ridership and providing mobility to all residents of King County and the region.

In 2018 King County Metro conducted its Rider/Non-Rider survey to measure rider satisfaction with service elements such as: Level of Service, Comfort and Cleanliness, Information, Fare Payment, and Personal Safety. By conducting an analysis of overall satisfaction with Metro services, rider frequency, and satisfaction with individual

elements of service, the Rider/Non-Rider Survey Report was able to identify the greatest barriers to transit ridership in the County. In aggregate, the services elements with both low user satisfaction and a high strength of relationship to ridership are: Level of Service, Transferring, and Comfort and Cleanliness. These results indicate that King County Metro should focus on these elements to improve rider satisfaction and overall ridership.

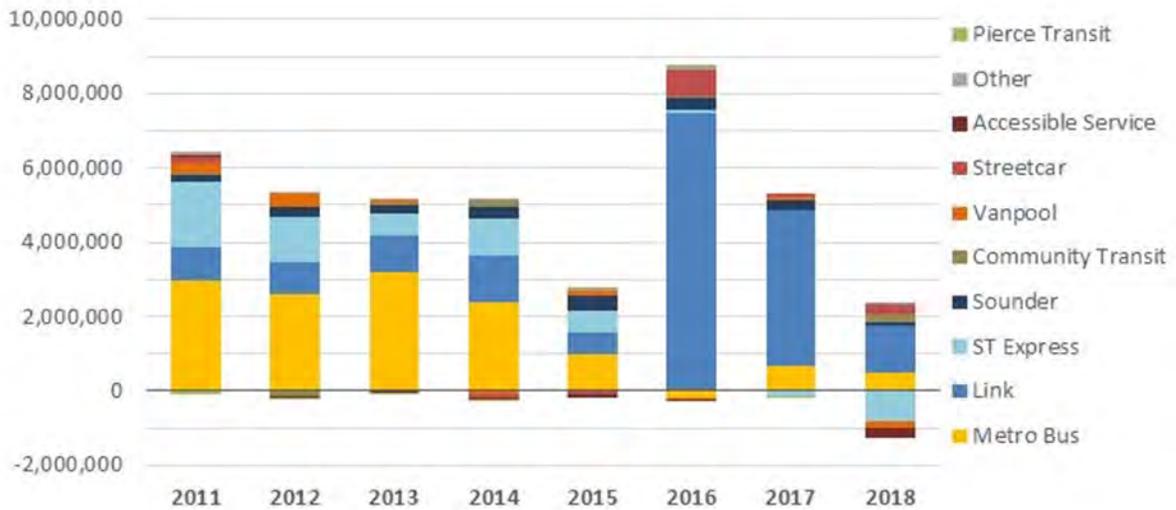
Among the “Level of Service” category, Availability of Service, Frequency of Service, and Travel Time were rated as the most important customer expectations arising from the Rider/Non-Rider Survey. From those considered “Non-Riders,” over 20 percent of respondents stated that they would use Metro bus service regularly if it was available for their commute, and 50 percent stated that they would use it for occasional personal trips if service was more widely available. Other high-level barriers of use for non-riders included long travel times, a lack of flexibility in planning their travel, and a lack of great connections between bus lines. These responses from non-riders and infrequent riders indicate that improved service in terms of availability, frequency, and coverage would encourage more County residents to use transit on their commute and personal trips.

While Metro system-wide ridership continues to grow slowly, Metro is losing its “market share” of regional trips, failing to keep up with both population and employment growth. System-wide ridership have been buoyed by large service hour increases, but they have obscured declines in system-wide productivity over the past few years that are clear with more detailed study. Over the long term, productivity declines result in lower farebox recovery and increasing cost per boarding. System-wide travel speeds are also declining, adding to the ridership challenge.

Overall, annual rides on Metro service (fixed-route bus, Vanpool, and Access) have increased from 113.4 million in 2010 to almost 126.7 million by 2018. Most of this growth occurred before 2015. Metro services realized a decrease in ridership in 2016, likely associated with the expansion of Link light rail to the University of Washington, which realized a dramatic increase in ridership that same year. Since 2016:

- All Metro ridership has only increased 0.65 percent (816,000 annual rides)
- Metro fixed-route ridership increased 1.0 percent
- Several services (ST Express, Vanpool, and Access) had declines in ridership

Figure 26 Annual Change in King County Transit Boardings by Agency (2011 - 2018)



Source: APC Database, Sound Transit, Community Transit, Pierce Transit

While overall fixed-route ridership has increased since 2016, a slight majority (51 percent) of routes had a decline in ridership over that period. All types of routes realized ridership declines, including RapidRide, frequent and less frequent services. To understand changes affecting the leveling of Metro ridership, specifically fixed-route ridership, the analysis looked at changes in ridership by day, period of the day, and frequency of service since 2016. The analysis found ridership in off-peak periods, and particularly weekends, declined countywide.

- Saturdays, in particular, have declined by almost 2,200 average daily riders since 2016. Saturdays had ridership declines during all periods of the day. Notably, trolley routes lost significant ridership on Saturdays.
- Sundays realized a small decline in ridership. All the decreases in ridership occurred in the daytime period; ridership increased during the evening and night periods.
- Weekdays realized a small increase in ridership (0.2 percent), mostly due to the growth of 1,500 average daily trips during the PM peak period. This increase in the PM peak was partially offset by a decrease of 744 average daily trips during the midday period.

Figure 27 Change in Average Rides by Day and Period (Fall 2016 to Fall 2018)

Period	Weekday	Saturday	Sunday
AM Peak	45	-1,162	-563
Mid-day	-744	-1,162	-563
PM Peak	1,520	-527	188
Evening	-62	-527	188
Night	90	-473	327
All Periods	849	-2,162	-48

Source: APC Database

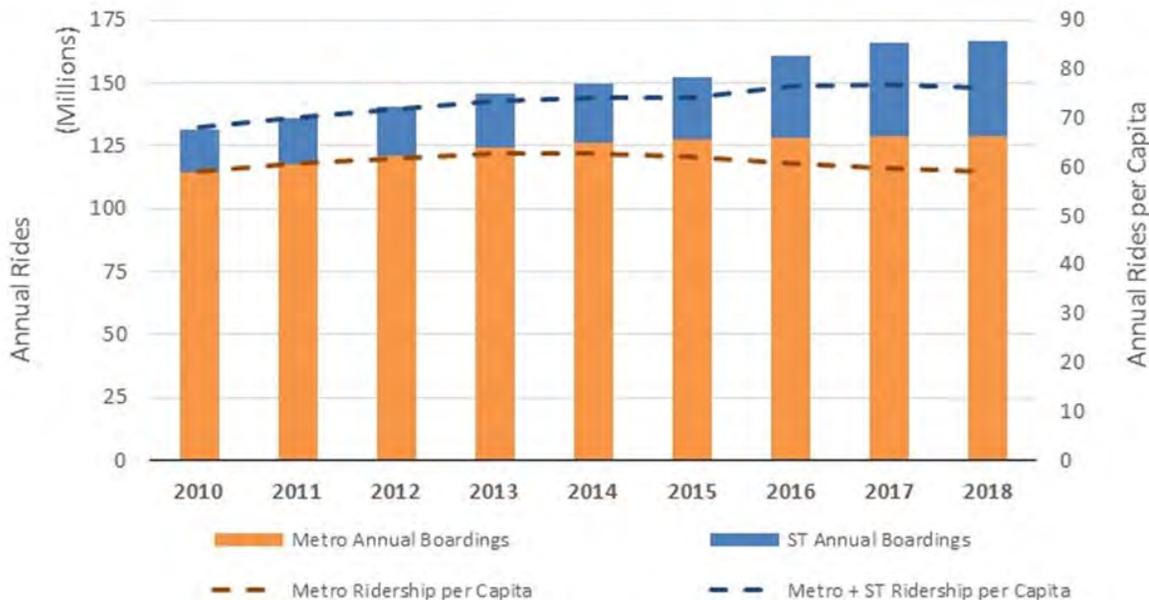
During the off-peak periods, routes with frequent service (defined as routes scheduled every 15 minutes or less) had smaller declines in ridership since 2016 than those with less frequent service. Frequent routes on Sunday realized a 1.8 percent increase in ridership.

Transit's Market Share is Declining

While transit boardings from 2010 to 2018 have grown year over year, the growth in boardings has not kept pace with population growth starting in 2015.

- King County's population has grown considerably since 2010 with the largest annual increases in 2016, 2017, and 2018.
- Ridership per capita (including Sound Transit service) increased from 2010 to 2014 and then started to decline after 2015.
- Metro ridership per capita has fallen consistently from 2014 through 2018.

Figure 28 Annual Ridership and Ridership per Capita



Source: APC Database, Sound Transit, Washington Office of Financial Management

Ridership has also been falling in relation to regional employment. Historically, ridership has increased at about two-thirds the rate of employment growth. However, the last few years have seen employment growth hovering at over 3 percent annually, while ridership growth has been below 1 percent for each of the last three years.