CTA RIDER/NON-RIDER BEHAVIOR AND ATTITUDES SURVEY

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Prepared for the Chicago Transit Authority
Prepared by Abt SRBI

Agenda

Background & Method

Key Findings

Summary of Key Findings

Q & A



Background & Method

• Background

Method



Background

- Last conducted in 2000
- CTA wants to increase ridership
- Goal is to understand the complexities of those in CTA service area:
 - who they are
 - how they travel
 - transportation needs
 - CTA's image
 - opportunities for improving performance and communications



Method

- Telephone survey among those with landlines and cell-phone service
- 2800 service area residents age 16+
- Disproportionate sample by geography
- Weighted to match known pop statistics by demography, geography, phone ownership
- Questionnaire: trip behavior, transportation needs, demographics, CTA and auto attitudes
- Fielded October November 2009



Key Findings

- Customer Landscape
- Needs/Perceptions/Delivery Gaps
- Segmentation



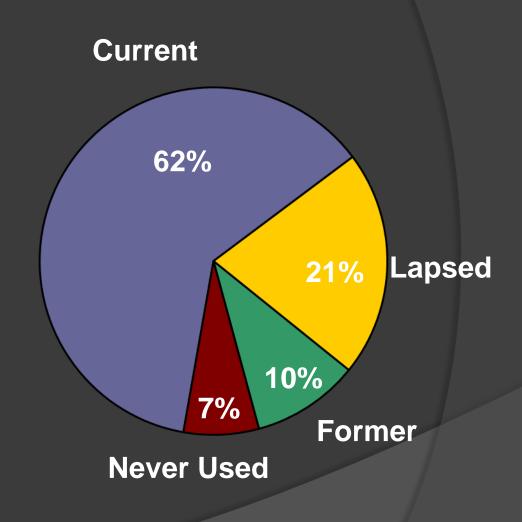
Customer Landscape

- CTA Experience
- Customer & Non-customer Profiles
- Customer Subgroups
- Non-customer Subgroups



CTA Experience: Total Market

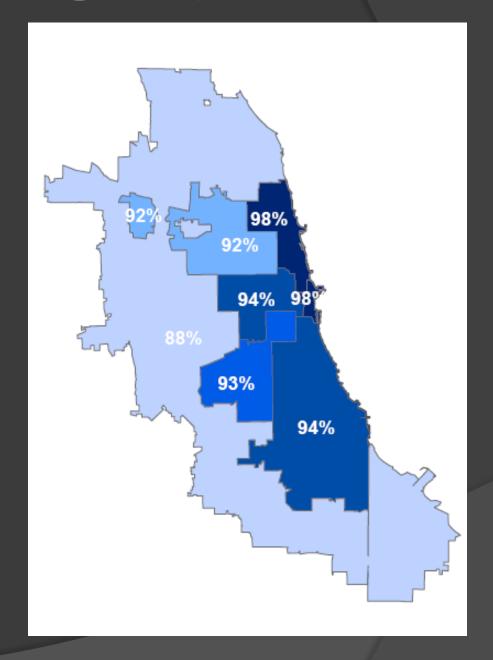
- Virtually all (93%) already tried CTA
- Most (62%)currently use
- Rest are mostly lapsed (past year, not past month 21%) and former (tried but not past year– 10%)





CTA Experience: By Geography

- 94% in the City as a whole
- Less so in the Suburbs (88%)
- Strongest in Downtown and North (both 98%)





Customer & Non-customer Profiles

Customers

- Skew male, younger, more students, less affluent, more Hispanic
- Skew City, "newer" to home
- Fewer have licenses or cars

Non-customers

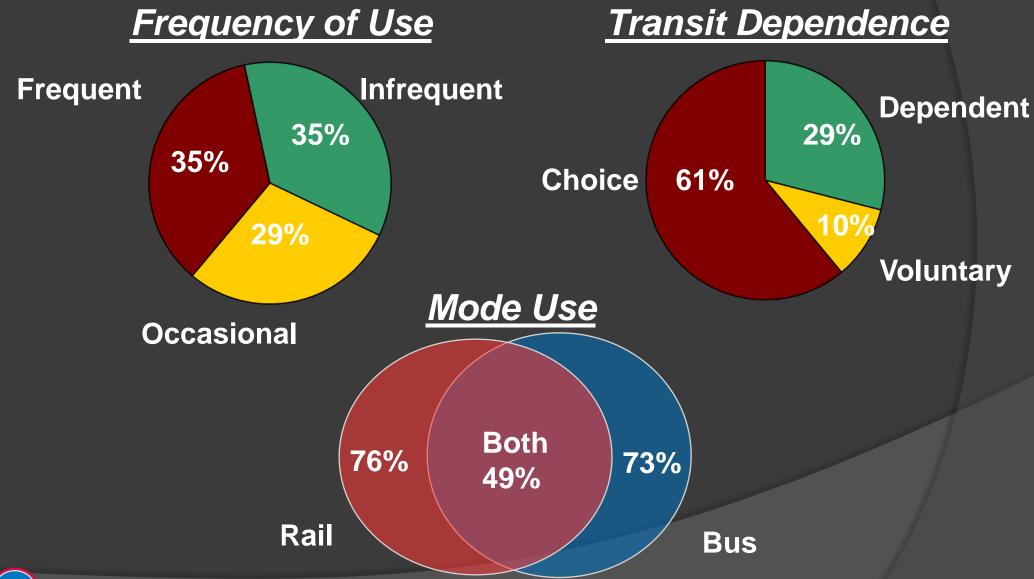
- Skew female, older and retired, more affluent, more Caucasian
- Skew Suburbs, in home longer
- More have licenses and cars





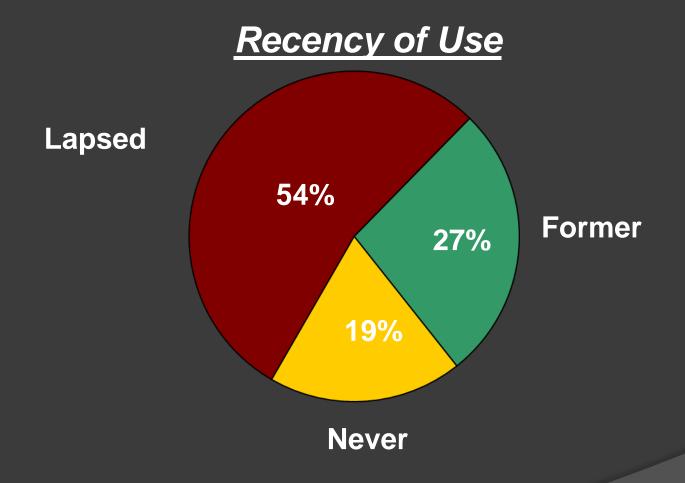


Customer Subgroups: Overview





Non-customer Subgroups: Overview





Needs/Perceptions/Delivery Gaps

- Transportation Needs Examined
- Transportation Needs Overall
- Overall Ratings
- Gap Charts



Transportation Needs Examined

 Examined 8 factors for needs and mode ratings (examined on an importance scale of 0-10):

On Time (OTP, quick)	Part of your world (familiar, nearby)
<i>Traffic</i> (congestion, environment)	Flexibility (schedules, emergency)
Safety (personal safety, crime)	Comfort (clean, comfortable, seating)
Value (good value)	Info (staff knowledge, trip info)



Transportation Needs: Overall

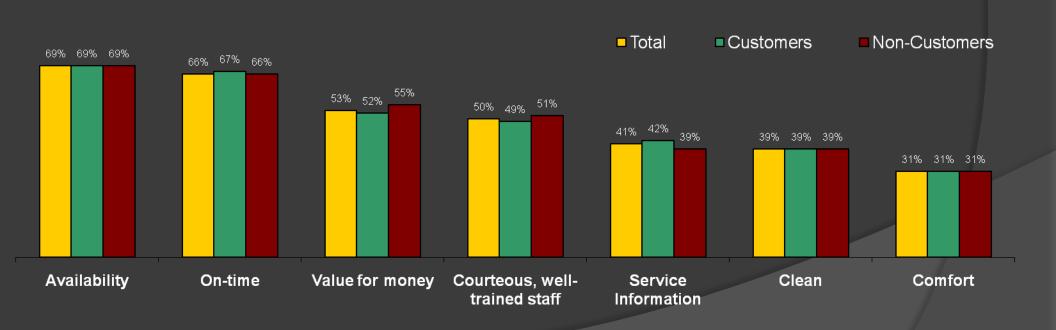
	<u>Customers</u>	Non-Customers
	% 8/9/10; Rank	% 8/9/10; Rank
On Time	84 / 1	86 / 1
Part of Your World	73 / 2	73 / 4
Flexibility	72 / 3	84 / 2
Value	71 / 4	76 / 3
Info	66 / 5	69 / 7
Traffic	63 / 6 (t)	64 / 8
Safety	63 / 6 (t)	72 / 5
Comfort	57 / 8	71 / 6

- On Time is most important to customers, while On Time and Flexibility
 matter most to non-customers. Non-customers consider a variety of needs
 more important than customers do.
- Comfort matters least to customers, but non-customers care least about Traffic.



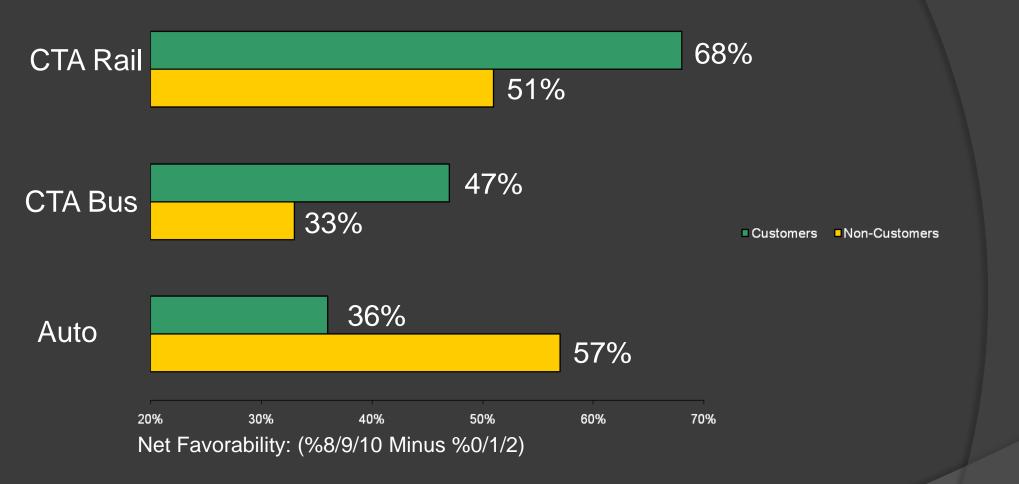
Transportation Needs: Priorities

- In head-to-head comparisons of priorities, we looked closer at 7 areas.
- Of these, Customers and Non-customers agree that Availability and On Time matter most; Comfort least.





Overall Ratings



- Customers more positive about CTA modes than auto; rail leads
- Non-customers view auto and CTA rail almost at parity, bus much lower



Gap Charts

• Customer Gap Charts

Non-customer Gap Charts



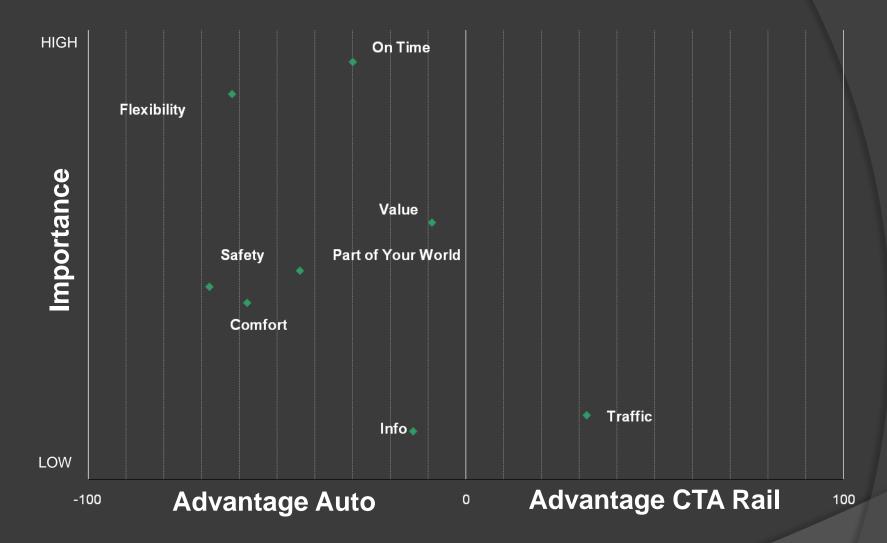
Customer Gap Chart: Rail vs. Auto



- Auto leads for On Time, Flexibility, and Part of Your World. Also for moderately important Safety and Comfort
- CTA rail holds a strong advantage for Traffic; slight advantage for Value and Info



Non-customer Gap Chart: Rail vs. Auto



- Auto's advantages more pronounced among non-customers;
 Value is now also an advantage
- CTA rail's sole advantage is Traffic (low importance)



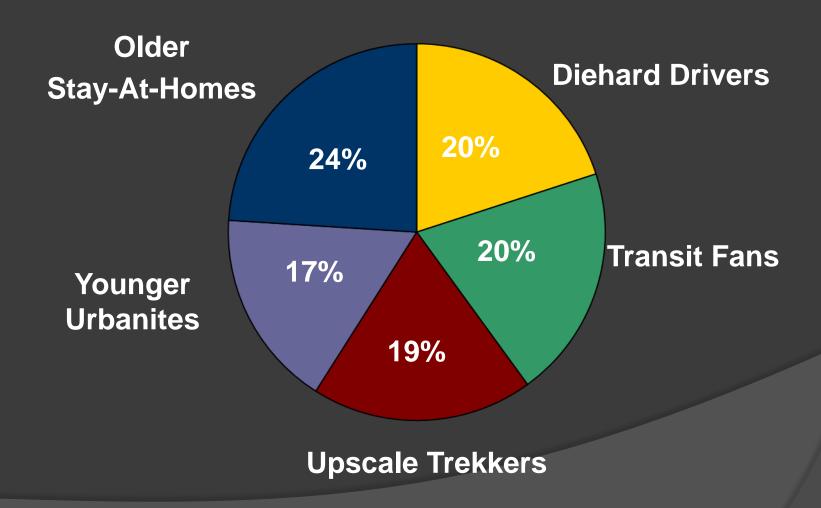
Segmentation

- No longer just "Customers" and "Non-Customers"
- Market segments



Segmentation

Five distinct segments defined with fairly close proportions:

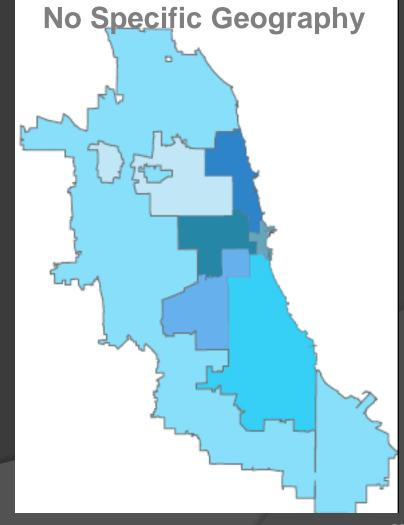




Segmentation: Older Stay-at-Homes

- Older, more retired, long-term residents, African-American or Hispanic; less affluent
- Fewer trips
 (weekday/weekend); more
 likely to take CTA bus, less for
 car, less commuters
- Care most about On Time, Part of Your World, Value and Info
- Generally positive about CTA overall; rate bus, rail, and auto about equally on most attributes

24% of population23% of customers26% of non-customers

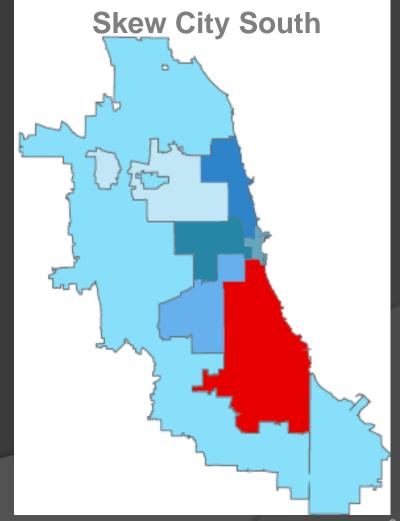




Segmentation: Diehard Drivers

- More female, skew African-American
- Use car for weekday trips
- On Time, Flexibility, Safety (from crime) matter most to them; Traffic matters less
- Rate auto higher than all CTA modes

20% of population13% of customers32% of non-customers

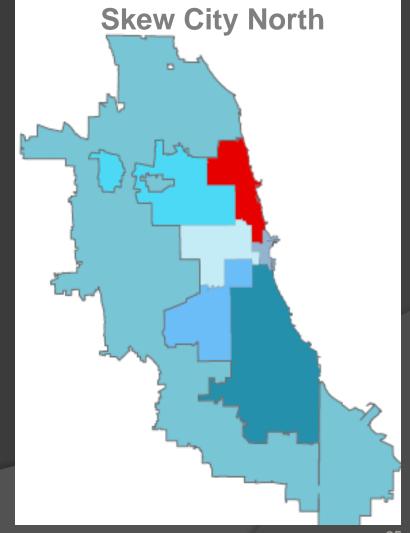




Segmentation: Transit Fans

- More male, 25-34, Caucasian, small HH size
- Fewer weekday trips but "fair share" on weekend; bus and rail customers, more work at home/telecommute, fewer cars
- On Time is most important
- Favor all CTA modes over auto; rail and bus beat auto for Value, Part of Your World, Traffic; rail also leads for On Time

20% of population28% of customers7% of non-customers

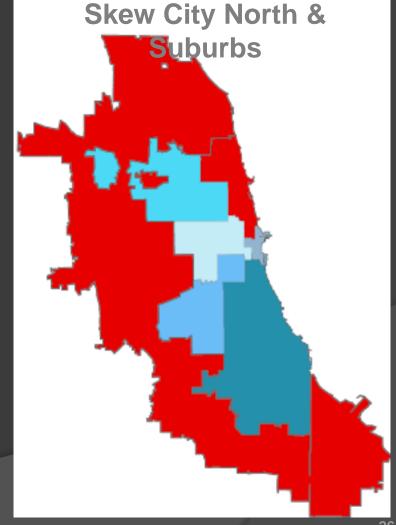




Segmentation: Upscale Trekkers

- More male, employed,
 Caucasian, affluent, educated;
 fewer retired
- Make many trips, especially weekends, tend to drive
- On Time is the most important feature; so is Part of Your World
- Auto generally superior than rail; auto leads rail for Flexibility and Safety

19% of population20% of customers18% of non-customers

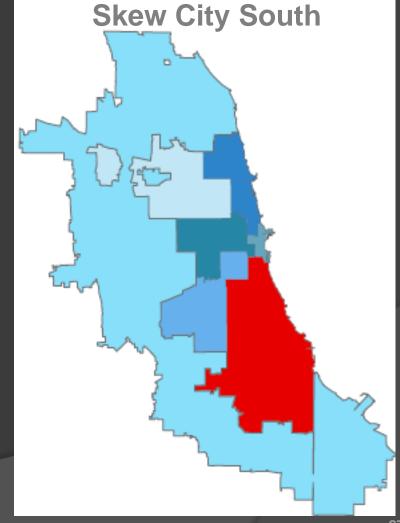




Segmentation: Younger Urbanites

- More young, female, African-American, students;
 somewhat lower income
- More weekday trips, commuters; use CTA & car relatively equally
- Care most about Flexibility,
 Value, and Part of Your World
- Consider CTA rail equal to auto overall, but not bus; rail seen superior for *Traffic*, auto leads on all else

17% of population17% of customers16% of non-customers





Summary of Key Findings

- CTA experience in service area is saturated.
- Customers
 - Equally divided into frequent, infrequent and occasional users.
 - Majority choose transit though they have other options; a third are totally dependent.
 - Bus and rail have equal penetration with about half of customers currently using both modes.
- Non-Customers
 - Majority of non-customers are lapsed (past year, not past month).



Summary of Key Findings (Cont'd)

- Customers are most concerned with On Time; non-customers want this and much more.
- Overall, CTA modes rated higher than auto among customers; the reverse is true among non-customers.
- Analysis produced 5 distinct segments
 - Older Stay-At Homes
 - Diehard Drivers
 - Transit Fans
 - Upscale Trekkers
 - Younger Urbanites



Questions?

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Appendix



Customer Subgroups: Frequency Detail

Frequent

- Younger, less affluent, more employed, more African-American, fewer Caucasian
- More live in City
- More weekday travel, more commute

<u>Infrequent</u>

- Fewer work full time, more retired
- No significant geographic skews
- Fewer weekday/ weekend travel, more left home after AM peak

Occasional

- More male, older, better educated, more affluent, more Caucasian
- More Suburb
- Heavier weekend travel, more likely to work at home/telecommute



Customer Subgroups: Dependency Detail

Dependent (29%)

- More female, less educated, less affluent, fewer working full time
- More live in City
- Less rail than Voluntary customers

Voluntary (10%)

- Younger, more students, fewer working full time
- More live in City, "newer" to home
- Fewer commute,
 but are more likely
 to return during
 PM peak

Choice (61%)

- More male, better educated, more affluent, more working full time, more Caucasian
- Skew Suburb
- More weekday/ weekend travel, less travel on CTA



Customer Subgroups: Mode Detail

Rail

- More affluent, better educated, higher income, more working full time, more Caucasian
- More Suburb
- More weekday/weekend travel, more commuters

Bus

- Less affluent, less educated, lower income, fewer working full time, fewer Caucasian
- More City
- Fewer weekday/weekend travel, fewer commuters



Non-customer Subgroups: Recency Detail

Lapsed

- Younger, more affluent, better educated, more employed full time
- No geographic skews
- More weekday/ weekend travel

Former

- More female, older, retired
- More live in City
 South, longer in current residence
- Fewer commuters

Never

- More male, less educated, more Hispanic
- Skew Suburb
- Less weekday travel, less likely to use own car for travel, fewer with driver's license



Explanation of the Scores

- Transportation needs use the top 3 box on an 11-point scale (% 8/9/10)
- Ratings use "net favorability" index
 - Index created by taking % top 3 box on an 11-point scale and subtracting bottom 3 box (% 8/9/10 minus % 0/1/2)

On Time (OTP, quick)	<i>Part of your world</i> (familiar, nearby)
Traffic (congestion, environment)	Flexibility (schedules, emergency)
Safety (personal safety, crime)	Comfort (clean, comfortable, seating)
Value (good value)	Info (staff knowledge, trip info)

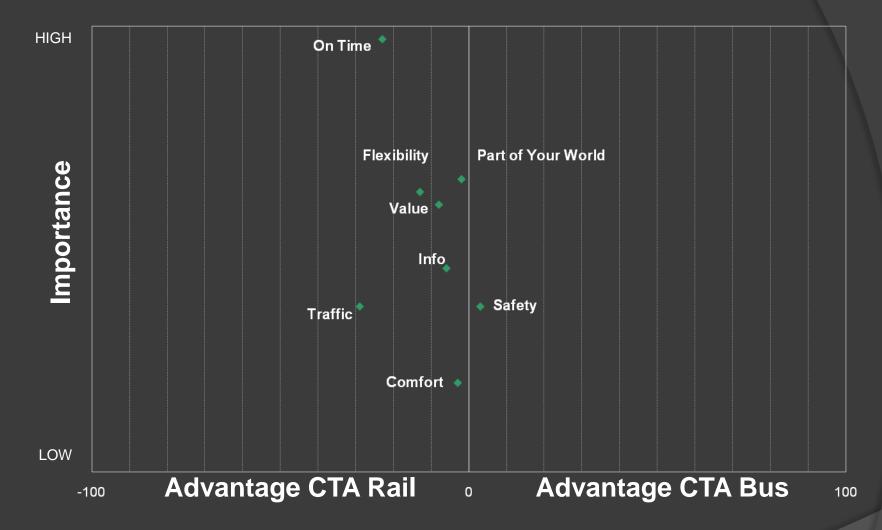


Explanation of the Gap Analysis

- Gap charts plot comparative mode advantages (x axis) vs. needs or importance (y axis)
- There are always two modes per chart
- Position of attribute on chart determined by two factors:
 - taking "net favorability" index of one mode and subtracting the index from the other comparison mode (i.e.; 12% Rail minus 20% Bus = -8% gap score or an 8% gap advantage for Bus)
 - taking the importance top 3 box score....the higher the score the closer the item is to the top of the chart



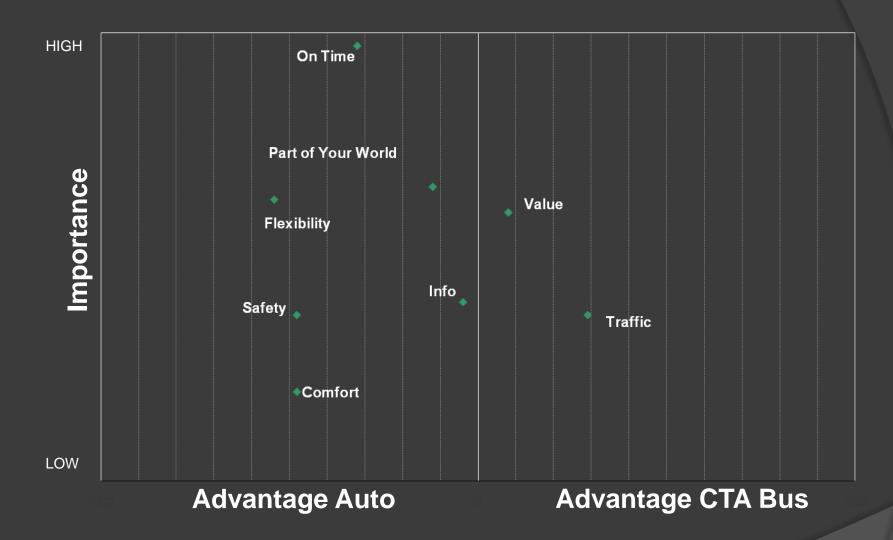
Customer Gap Chart: Rail vs. Bus



 CTA rail has edge on almost all attributes; largest rail advantages are On Time and Traffic.



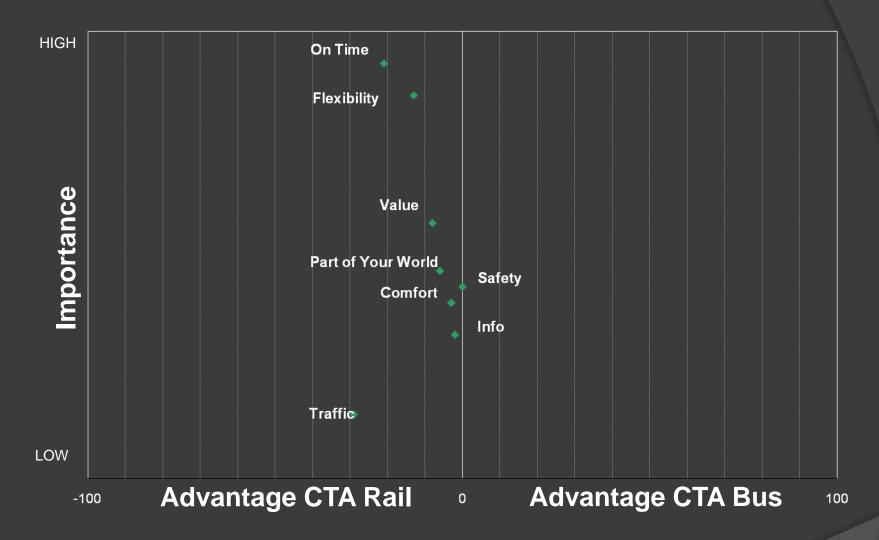
Customer Gap Chart: Bus vs. Auto



- CTA bus viewed similarly as rail when compared to auto; auto is advantageous in most areas
- Bus seen superior for Traffic with slight edge for Value



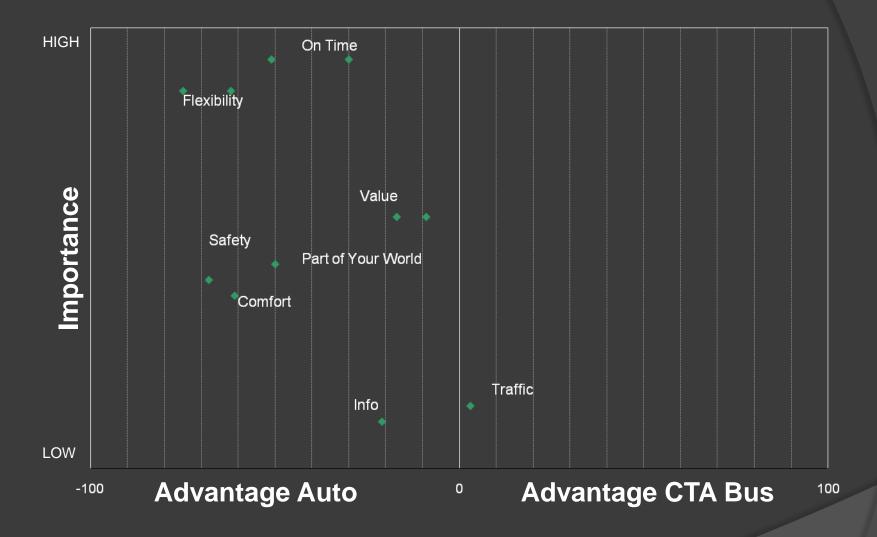
Non-customer Gap Chart: Bus vs. Rail



- Non-customers view rail vs. bus the same as customers:
 - On Time and Traffic stand out for CTA Rail
 - Rail has the edge on all other attributes



Non-customer Gap Chart: Bus vs. Auto



 Auto holds advantage over CTA bus on almost every attribute – even at "almost parity" with bus for *Traffic*



Explanation of the Segmentation Analysis

- Respondents divided into distinct segments using a multivariate procedure called K-means Cluster Analysis
- Each segment contains individuals who share similar views with others in that same group, but carry different views than members of other segments
- "Views" based on mode attribute ratings



Segmentation Summary

- Analysis produced 5 distinct segments.
 - Older Stay-At Homes are older, take fewer trips and are generally positive about CTA.
 - <u>Diehard Drivers</u> are skewed female and very carcentered. Safety is very important but "net favorability" is negative for CTA modes.
 - Transit Fans are more likely to be young males. They are core customers although they take fewer trips.
 - Upscale Trekkers are just that, upscale and suburban.
 They are heavy discretionary travelers who generally prefer to drive. They need to have transportation options close by.
 - Younger Urbanites are heavy travelers. They are not loyal to any mode; they use CTA equally to auto. Like Diehard Drivers, Safety is very important but "net favorability" is negative for CTA modes.

