



ITEM ID: 2026-125-0

TRANSMITTAL DATE: February 20, 2026

MEETING DATE: February 27, 2026

TO: Board of Directors

FROM: Lisa Bahr, Chief Customer Experience Officer

SUBJECT: Metrolink 2025 Onboard Survey - Summary of Key Findings

Issue

In June 2025, just prior to the end of the Student Adventure Pass, Metrolink conducted a systemwide Onboard customer survey to update ridership demographics and travel patterns. This report highlights the key insights about Metrolink's post-pandemic ridership base, and significant changes since the pandemic.

Recommendation

Receive and file.

Strategic Commitment

This item aligns with the Strategic Business Plan Commitment of:

- **Customers Are Our Business:** We respect and value our customers, putting them at the heart of all we do, and work hard to attract and retain new customers by understanding their needs and finding new and innovative ways to bring them on board. The customer survey helps us better understand customer needs and improve the customer experience.

Background

The Authority's customer research program uses a multi-faceted approach to gather feedback to better understand ridership and the overall customer experience. This strategy includes satisfaction survey and monitoring of customer communications. In October 2025, staff

launched a new continuous “after-ride” survey to collect daily feedback on passengers’ most recent trips.

Additionally, the Authority conducts in-person origin-destination (OD) surveys onboard trains to establish statistically representative benchmarks of ridership characteristics as required by FTA. In June 2025, the Authority completed its first onboard OD survey since the pandemic; the previous survey was in 2018. Significant changes to fare policies and service levels since then made updating this baseline critical for future planning.

The latest survey highlights major shifts in travel behavior and rider demographics since the pandemic. Post-pandemic work patterns -especially the rise of hybrid work schedules - have sharply reduced the traditional five-day commute. To maintain comparability, the 2025 survey design closely mirrored the 2018 study, enabling direct year-over-year comparisons.

Trained surveyors from ETC Institute, which previously also conducted the Metro 2023 Onboard Survey, distributed both English and Spanish language surveys onboard Metrolink weekday and weekend trains. A total of 4,357 completed and valid surveys were collected, resulting in a response rate of 85%. Results at the system level are reliable within a margin of error of plus/minus 1.27% (95% confidence level).

The primary objective of the 2025 Onboard Survey was to capture statistically representative data to help Metrolink understand the evolving needs of its passengers in the post-pandemic era. Key objectives included:

- **Travel Pattern Analysis**: Capturing detailed origin-destination patterns and “first-and-last-mile” travel modes to inform future strategic and service planning.
- **Fare Strategy**: Identifying ticket purchasing preferences and the utilization of discounted fares to guide future fare design and revenue modeling.
- **Customer Satisfaction**: Measuring perceptions of service quality and the overall rider experience to strengthen ridership retention and facilitate future ridership growth.
- **Demographic Understanding**: Building a comprehensive profile of the current rider base to ensure service equity and fulfill Title VI requirements.

Discussion

The findings of this report signal a fundamental transformation of the Metrolink ridership base. Since the pandemic, the system has evolved from a five-day-a-week commuter service into a more flexible system serving a more diverse and transit dependent population. This evolution, captured in the 2025 Onboard Survey, reveals a new rider profile that is younger, has a lower income, and is more ethnically diverse, with Hispanic riders now constituting the largest demographic group. The traditional daily commute has been replaced by hybrid work schedules and a significant increase in occasional trips for leisure, school, and social purposes.

While overall rider satisfaction, measured by the Net Promoter Score, has slightly increased, the data reveals a polarization in sentiment. Ratings for service attributes like “Value of Metrolink fare compared to driving” have improved, but satisfaction with “station security” and “schedule convenience” has declined, particularly among the most loyal frequent commuters. The demographic shift also underscores the need for multilingual outreach and equity-focused informational campaigns to ensure all riders are aware of available programs and discounts.

The New Metrolink Rider: A Demographic Transformation (2018-2025)

The 2025 Metrolink rider is demographically distinct from the pre-pandemic user. The data indicates a significant shift towards a younger, lower-income, and more transit-dependent base.

- **Ethnicity and Race:** Hispanic riders now constitute the largest single ethnic group, growing from 30% of ridership in 2018 to 40% in 2025. In contrast, the share of Caucasian riders fell from 33% to 22%, and the share of Asian riders declined from 20% to 16%.
- **Age and Student Status:** Riders are now more likely to be under the age of 30 or over the age of 65. Driven by the popularity of the Student Adventure Pass, student ridership grew by 12 percentage points, accounting for 27% of all riders in 2025.
- **Employment Status:** The share of riders employed full-time has seen a dramatic 18-point drop since 2018. This has been offset by a nine-point growth in part-time employment and an increase in riders who are retired or not currently employed (from 14% to 22%).
- **Income Levels:** There is a distinct trend toward lower household incomes. The segment of riders earning less than \$20,000 annually saw the largest increase, growing by 9 percentage points. Concurrently, higher-income brackets, such as those earning \$75,000–\$150,000, experienced notable declines.
- **Transit Dependency:** Car access has declined significantly. The percentage of riders with no access to a vehicle increased from 16% in 2018 to 27% in 2025. These transit-dependent riders are predominantly students, younger individuals, and Hispanic riders.
- **Language:** The diversity of the ridership is reflected in language use. The share of riders who speak a language other than English at home grew by 6 points to 51%. Of this group, 71% speak Spanish. Even though they may prefer to speak another language at home, most are proficient in English: three-quarters (76%) reported they speak English very well.
- **Gender:** The gender balance has shifted from a female majority (52%) in 2018 to a male majority (53%) in 2025.

Evolving Travel Patterns: From Regular Commutes to Occasional Use

Travel behavior on Metrolink has moved decisively away from the traditional five-day-a-week commute.

A. Trip Frequency and Purpose

- **Frequency Decline:** The most dramatic change is the decline in high-frequency travel. The share of riders using the system five days a week plummeted by 26 percentage points.
- **Rise of Hybrid and Infrequent Use:** Ridership for one to three days per week nearly doubled, reflecting the rise of hybrid work schedules. Infrequent use (less than once a month) also increased from 10% to 17%.
- **Shift in Trip Purpose:** Work-related trips, which accounted for 78% of travel in 2018, fell to 53% in 2025. Conversely, riders are now twice as likely to use Metrolink for leisure (6% to 12%) and friends or family (7% to 14%).

B. First and Last Mile Access

The ways riders get to and from stations have become significantly less car-dependent and

more reliant on active transportation.

- **First Mile (To Station):** Driving one's own car to a station dropped from 63% to 47%. In the same period, walking more than tripled (from 4% to 14%) and biking quadrupled (from 1% to 4%).
- **Last Mile (From Station):** Walking is now the most common last-mile mode, with 31% of riders walking to their final destination, up from 18% in 2018. Transit mode share fell to 36%, down from 51% in 2018.

C. Trip Distance and Regional Flows

- **Shorter Access/Egress Distances:** Both "first mile" and "last mile" travel distances have decreased, suggesting the current rider base lives and works closer to Metrolink stations. The average first mile distance fell from 4.7 miles to 3.2 miles, and the last mile from 3.3 to 2.8 miles.
- **Trip Length Variance:** The average overall trip distance has decreased slightly by 2.2 miles. Interestingly, non-commute trips are now longer on average (36.9 miles) than commute trips (31.3 miles).
- **Los Angeles as a Central Hub:** Los Angeles County remains the primary destination, serving as the "non-home" end for 69% of all trips.

III. Rider Satisfaction and Service Perceptions

While the overall Net Promoter Score (NPS) improved slightly from 30.4 in 2018 to 32.0 in 2025, a deeper analysis of satisfaction ratings reveals a more complex picture of polarized sentiment and specific areas of concern.

Overall Satisfaction Trends

- **Ratings Polarization:** Across most service attributes, the proportion of riders giving an "Excellent" rating increased, often at the expense of "Good" ratings. However, several attributes also saw small upticks in negative ratings ("Poor" or "Very Poor"), indicating a more intensely divided rider opinion.
- **Satisfaction by Rider Type:** Traditional full-time commuters and work-trip riders tend to be less satisfied than newer, occasional riders. This suggests the shift in ratings may be reflective of the demographic transformation in ridership.

Areas of Most Improved Performance

- **Value of the Fare:** Perceptions of the value of Metrolink fares compared to driving have notably increased, with a ten-point increase in satisfaction. This is driven by a 17-point increase in the highest ("excellent") rating on this metric. In 2025, 89% of the oldest riders (aged 65 or older) rated the value of their Metrolink fare compared to driving as good or excellent. Less frequent riders and those using Metrolink for leisure were also more likely to give this service aspect a positive rating.
- **Responsiveness to customers:** Both the overall positive and excellent ratings of Metrolink's responsiveness to customer concerns have increased year over year. Negative and neutral ratings have marginally decreased. Less frequent, newer, and White riders were all more likely to give this attribute an excellent rating.

Areas of Concern

- **Station Security:** A notable decline was observed in riders' perception of security. The satisfaction score for "Feeling secure from crime while at station" dropped 6 points to 65%.

- **Schedule Convenience:** Satisfaction with the convenience of train schedules, already a lower-rated attribute in 2018, declined a further 4 points to a 60% satisfaction score. This is a key pain point for Metrolink's most loyal riders.

Perception of onboard security and experience with Sexual Harassment is a particular concern for female riders:

The share of riders who directly experienced sexual harassment remained consistent between 2018 and 2025. In 2025, 85% of riders reported neither experiencing nor witnessing non-physical harassment, while 95% reported the same for physical harassment and indecent exposure. As in 2018, the Antelope Valley Line was again the line with the highest rate of riders reporting sexual harassment, with rates significantly higher than the systemwide average for all categories.

Metrolink service is succeeding with a new generation of younger, diverse, and price-sensitive riders. But we are failing to meet the fundamental needs (schedules, reliability, and customer care) of our most loyal and frequent riders, including traditional commuters.

The path forward requires a dual focus: Nurture the new market while delivering on the core service promise for all riders. The onboard survey will serve as a benchmark against which staff will monitor customer experience feedback from our ongoing after-ride surveys.

Next Steps

Staff will share key survey findings with the public on the Metrolink website and through direct email communications. Key satisfaction indicators will be tracked with ongoing CX customer research.

Prepared by: Henning Eichler, Senior Manager, Market Insights and Analytics

Approved by: Lisa Bahr, Chief Customer Experience Officer

Attachment(s)

[Attachment A - 2025 Onboard Survey Report](#)

[Attachment B - Line Crosstab](#)

[Attachment C - County Crosstab](#)

[Presentation - 2025 Onboard Survey Key Findings](#)