



ITEM ID: 2023-257-0

TRANSMITTAL DATE: July 7, 2023

MEETING DATE: July 14, 2023

TO: Executive Committee

FROM: Lisa Bahr, Chief Customer Experience Officer

SUBJECT: Metrolink Potential Rider Study

Issue

The Authority has conducted a study to better understand perceptions, attitudes and preferences of potential Metrolink riders. Staff will present the research findings identifying key barriers and opportunities to target the potential ridership market.

Recommendation

Receive and file.

Strategic Commitment

This report 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. Research into the perceptions, attitudes and preferences of potential customers will help the Authority to develop more relevant service offerings and communications.

Background

Since the start of the pandemic, the Authority has conducted surveys and focus group studies with both employers and employees to learn how Metrolink can help meet their travel needs.

As we have entered the third year since the start of the pandemic and Metrolink ridership

recovery has started to slow, the need for a deeper understanding of the potential ridership market has become more urgent. Recognizing this, the Authority's member agency CEOs recommended a study of potential riders to determine, in depth, why they are not using Metrolink and what would be needed to achieve a mode shift to passenger rail.

Between January and April 2023, staff conducted a survey of this potential ridership market, followed by a series of focus groups to identify opportunities and design new outreach strategies. The research included inquiries regarding work-from-home as a post-pandemic phenomenon.

Discussion

Research into potential ridership markets plays an important role in growing Metrolink ridership. Understanding mode choice behavior and the decisions potential riders make whether or not to take Metrolink is of critical importance for continued ridership growth. While demographic variables, such as age, gender, income, and education, have traditionally been used to explain mode choice behavior, they often provide limited insights into the underlying psychological and social factors driving decisions.

Methodology

Transportation research literature shows a growing body of studies that consider attitudes, perceptions, and values, as formalized in the Theory of Planned Behavior (TPB), a widely recognized social psychological theory that offers a valuable framework for understanding and predicting mode choice decisions (see also: [Understanding How Individuals Make Travel and Location Decisions: Implications for Public Transportation](#), Transportation Research Board, Washington D.C. 2008). The TPB framework goes beyond demographic factors by incorporating the psychological determinants that influence mode choice. This approach recognizes intentions and behaviors are not solely determined by demographic characteristics but are also influenced by an individual's attitudes towards different modes, the social norms they perceive, and their perceived barriers that impact transportation choices.

This study's objectives are to better understand the motivations of potential riders, the obstacles they need to overcome, and to identify opportunities for Metrolink to consider. Building upon academic research and previous Metrolink potential rider studies, staff developed a research design to identify market segments with the highest potential for ridership and to create messaging strategies that effectively reach this audience.

The potential rider study consisted of two phases. During the first (quantitative) phase, an online survey was conducted between January 17 and February 11, 2023, to collect both demographic and psychographic data on potential riders. The survey instrument utilized the TPB framework to understand the psychological determinants that influence mode choice. A total of 3,392 completed surveys were received from respondents near Metrolink stations in all five counties to be reflective of actual ridership by county. Statistical analysis was used to identify factors that are most predictive of Metrolink ridership and to create distinct potential ridership market segments.

Percent of Respondents from each County

County	Percent of Respondents
Los Angeles County	45%
Orange County	22%
San Bernardino County	15%
Riverside County	12%
Ventura County	6%

During the second (qualitative) phase of the study, a series of five focus groups was conducted during the month of April. Thirty-five survey respondents from phase 1 participated in the focus group research for a deep dive into the motivations and barriers that were identified in the survey. Focus group participants came from all five counties.

Findings

The data from this study allowed the creation of detailed demographic profiles of potential riders, but it also confirmed the importance of psychographic factors in predicting an individual's intent to ride Metrolink. This represents an important basis for the design of effective messaging.

Findings show that the potential ridership market reflects a diverse group of individuals with different preferences and opinions about Metrolink. They can be grouped into four market segments that are characterized by their varying likelihood to consider Metrolink for travel. Consistent with earlier studies, the data confirmed that associating Metrolink with a stress-free commute is the strongest motivator to ride Metrolink. Those most open to consider Metrolink represent about 25% of the potential ridership market.

The study also identified main barriers that potential riders said kept them from considering Metrolink for their travels. These are:

1. **Personal security is a main concern**

"Crime is the main factor that keeps me from using the train." (survey respondent)

Concerns about security were identified as most important by two out of three potential riders who have not previously taken Metrolink. Their opinions have been shaped by media reports of crime in general and on public transit in particular. However, personal security is less of an issue for potential riders who have taken Metrolink in the past, although it still ranks high as an obstacle to riding. Focus group participants acknowledged that they feel safer on Metrolink trains than on Metro. Yet, they voiced concerns about crime while waiting at a station or when transferring. Potential riders consider their entire trip which includes all first and last mile connections when evaluating personal safety. Some mentioned they would feel safer if there were more security or agency personnel nearby.

2. **Inconvenient Schedules prevent many potential riders from taking Metrolink**

"I can't even go to a 2:00 matinee performance at Disney Concert Hall because the last train leaves Union Station at 4:40 p.m." (survey respondent)

Potential riders overwhelmingly called for more evening and weekend service as the limited schedules present an obstacle that prevents them from taking the train more often. Respondents mentioned that train service ended too early to allow them to attend concerts or events or spend a whole day at a weekend destination.

3. Many potential riders are unaware of fare discounts and free transfers

“Maybe free/reduced fare transfers between it + local buses/rail?” (survey respondent)

Metrolink fares have a lower cost per mile than most peer commuter rail agencies. Yet, affordability can be an obstacle for potential riders which is why the Authority launched a low-income fare discount program in September 2022. But many potential riders are unaware of the fare discounts being offered, as survey responses have shown. Most importantly, the majority of potential riders do not know that Metrolink fares include free transfers to other transit services which leads them to over-estimate the actual cost of a Metrolink ride.

4. Non-riders don’t believe Metrolink is reliable enough to get them to work on time

“Unfortunately, the Metrolink trains in my area are not a reliable form of transportation.”

(survey respondent)

Service reliability is an issue that can be an obstacle for potential riders. Survey respondents mentioned concerns about getting stranded when taking Metrolink. Just one in four non-riders thought that Metrolink trains are reliable enough to get them to work on-time.

5. Many potential riders perceive Metrolink as inconvenient

“Show the public how to get to events by train. What station, what train or trains connect to where they want to go. I have a frustrating time just trying to figure out what ticket to buy and what trains to use.” (survey respondent)

Potential riders who have never taken the train may lack the most basic information of how to buy a ticket, find the right train to take, or transfer between trains. Others find the trip planning effort overwhelming and feel afraid they may miss a train or a connection.

Perceptions and attitudes

Consistent with the TPB research framework, the study analyzed the role of attitudes, values, and perceptions. The results show that removing the barriers alone will not be sufficient to motivate potential riders to switch to Metrolink. Improvements to service must be accompanied by efforts to change the perception of Metrolink in the minds of potential riders.

Many of the barriers identified above are linked to what is called behavioral control beliefs. These include internal or external factors beyond one’s control, such as train schedules and affordability, and the effort potential riders perceive to be necessary to ride Metrolink. Potential riders who thought that Metrolink was difficult to use were less likely to consider riding.

Findings also show that intent to ride is influenced even more by attitude: subjective beliefs, positive or negative feelings, and perceptions about Metrolink. Attitude is shaped by sentiments about Metrolink and the perceived benefits and drawbacks of riding. It explains the outsized impact of perceived safety risks from crime on likelihood to ride Metrolink. At the same time, the subjective nature of attitudes means that they can be influenced and shaped, which offers an important opportunity for targeted messaging, similar to the successful health and safety campaigns Metrolink employed during the early days of the pandemic.

Finally, the study evaluated the role of subjective norms and values, including interpersonal and societal factors in driving intent to ride. Individual preferences for privacy or the desire to meet new people emerged as important factors. However, the data suggests that environmental benefits alone are not sufficient to motivate Metrolink usage.

Recommendations

Existing efforts to make Metrolink service more demand-driven and customer-friendly must remain the highest priority. This includes initiatives to optimize service and fares. But these efforts also need to be supported by the brand strategy and targeted messaging that raises awareness of Metrolink and changes how potential riders think about the service. Based on the study's findings, recommendations have been developed and grouped into strategies for the three stages of customer acquisition. Many of the recommendations reflect existing initiatives and emphasize the importance of continuing the effort:

- A. Awareness: Making the potential rider aware of Metrolink as a mode choice option.
- B. Consideration: Moving them from awareness to considering Metrolink for their next trip.
- C. Conversion: Incentivizing them to make the trip.

A. AWARENESS

Metrolink research has shown that awareness of Metrolink remains high, but true understanding of its service remains low. The distinction between Metrolink and Metro is unclear for many non-riders.

Recommendation: Raise awareness of Metrolink's brand identity

- Communicate Metrolink's brand identity as distinct from Metro.
- Build trust and develop positive brand associations.

Recommendation: Raise awareness of Metrolink as a viable transportation option

- Promote destinations and events served by Metrolink.
- Upgrade wayfinding signage to raise awareness of Metrolink stations.
- Work with station cities, community groups, and local businesses to promote Metrolink stations within a neighborhood.

B. CONSIDERATION

Even non-riders who are aware of Metrolink may hold beliefs that prevent them from considering it for their own travel. In many cases this may reflect a preference for the privacy and convenience of their own car. In other cases, this may be due to impressions and subjective beliefs about the service - beliefs that can be shaped by targeted messaging.

Recommendation: A safe and secure environment on Metrolink must remain the highest priority

- Perceptions of safety are often subjective and may be shaped by other aspects of the customer experience. Continue efforts to ensure cleanliness onboard and at stations. Make sure equipment at customer touchpoints is well-maintained and in working order.
- Maximize the use of images to illustrate a positive onboard experience.
- Communicate improvements being made to improve rider safety and security.

Recommendation: Continue efforts to optimize service to better meet demand

- Evaluate opportunities to enhance reverse peak, off-peak, and weekend service.
- Promote events and destinations that can be reached conveniently on Metrolink and provide necessary information for first-time riders.
- Where feasible, continue to offer special train service to events, possibly with third-party funding.

Recommendation: Raise awareness of fare discounts and affordability

- Many potential riders over-estimate the actual cost of riding Metrolink. This may be because they are unaware of available discounts, or they perceive fares to have increased along with other costs (Metrolink has not raised fares in nine years!).
- Continue to promote the savings provided by existing fare discounts.
- Increase efforts to communicate that Metrolink fares include many benefits including validity on connecting transit services. Simplify communication of fare information and make the ticket selection process easier for all types of riders.

Recommendation: Change the perception of unreliable service

Poor service reliability is both a factual obstacle as well as a subjective perception. Timely and accurate delay information can minimize the impact of delays.

- Increase efforts to minimize service delays and communicate to our riders.
- Improve efforts to provide timely and accurate delay information.
- Publish actual on-time performance data to build trust and show that the large majority of trains are on-time.
- Promote online tools to track real-time train status information.
- Evaluate digital signage options to display real-time information in stations and on platforms.

C. CONVERSION

This stage describes the role of the customer experience in converting potential riders into trial riders and loyal repeat riders.

Recommendation: Engage potential riders

- Continue to offer sales and promotions to incentivize ridership.
- Review if Metrolink information (both on paper and electronic) meets the needs of riders with different abilities.
- Conduct a study and implementation plan for improved wayfinding signage (currently underway).
- Create an Onboarding Strategy to welcome new riders, empower them to make the most out of their Metrolink ride (with “How-to” and “What-if” information and resources, build loyalty, and a sense of community).
- Communicate the free use of connecting transit.
- Increase the visibility of security or agency staff.

Next Steps

- Staff is leading the development of a Service Growth Development Plan. This plan is designed to optimize schedules for post-pandemic travel patterns.
- Pending Board approval on July 24, 2023, Metrolink’s low-income fare discount will become part of the regular fare structure and increase the affordability of Metrolink fares.
- Pending Board approval, a free fare pilot program for students will be launched in September 2023.
- A Station Connectivity Enhancement Plan has been completed. Some of the plan’s recommendations are being implemented under a pilot program that will include a Wayfinding study to improve signage and ease of use for new riders.

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Attachment(s)

[Attachment A - Metrolink Potential Rider Study
Presentation - Potential Rider Study](#)