

BOARD OF DIRECTORS DISCUSSION ITEM

2025 Customer and Community Survey Results and Data Analysis

Committee Meeting Date:

June 23, 2025

STAFF REPRESENTATIVE

John McKay, Chief of Staff

PRESENTATION LENGTH

35 minutes

BACKGROUND

RTD's 2021-2026 Strategic Plan (Strategic Plan) was approved by the Board on August 10, 2021. The Strategic Plan establishes the agency's four Strategic Priorities, which serve as the functional pillars used to plan, develop, evaluate, and measure the agency's overall performance.

RTD contracts with a third-party survey consultancy to conduct annual surveys to gauge agency performance related to the Strategic Priorities of Customer Excellence and Community Value. In April 2025, the consultancy administered surveys of community members as well as customers utilizing RTD's bus, rail, and paratransit services.

DISCUSSION

Survey Methodology:

- *Community Value:* The survey was administered from Tuesday, April 8 through Sunday, April 20, 2025. With a target sample size of 400 responses, surveys were mailed to a random sample of US postal service addresses within the RTD service area. The results were monitored to maintain demographic distribution in proportion to the region. Upon the conclusion of the survey, 770 completed responses were received.
- *Customer Excellence – Bus and Rail Customers.* To gauge the agency's 2025 performance related to Customer Excellence, survey teams were deployed throughout the transit system Monday, April 7 through Monday, April 14, 2025. The consultancy's sampling plan was inclusive of the entire service area and included all bus routes and light and commuter rail lines. With a target sample size of 1,200, the surveys were conducted via intercepts of individuals utilizing transit services. Upon the conclusion of the survey, 1,821 completed responses were gathered.
- *Customer Excellence Survey – Paratransit: Access-a-Ride and Access-on-Demand* – The survey ran from Monday, April 7 through Wednesday, April 23, 2025. Sampling for the paratransit customer survey was derived from active, eligible, registered customers who were contacted by a combination of text message, email, and mail for survey distribution. The target sample size was

400, and 440 completed responses were received.

Survey Accessibility

All surveys were available in English and Spanish. Language assistance services were made available in an additional 20 languages. For customers who are blind or visually impaired, assistance was made available through the agency's Americans with Disabilities Act (ADA) Office to complete the surveys.

Customer Characteristics:

Respondents are representative of the Denver metro area. Customer demography varied by service mode. For example, paratransit customers are most likely to identify as White or Caucasian women over 65 years of age, whereas bus and rail (collectively, fixed-route) customers are more likely to identify as White or Caucasian males ages 18 to 39. Among both fixed-route and paratransit customers, approximately 30-40% identify as Hispanic, Spanish, or Latino/a/x or Black/African American.

Among respondents, 63% of bus customers, 40% of rail customers, 86% of Access-a-Ride, and 90% of Access-on-Demand customers reported household incomes of less than \$50,000. Travel to medical appointments was the primary reason Access-a-Ride (52% of respondents) and Access-on-Demand (41% of respondents) utilized the services, whereas approximately 50% of fixed-route customers traveled for work as their primary reason for transit use. Among fixed-route customers, 71% of bus customers and 59% of rail customers report using transit three days or more per week, and 78% and 65% of bus and rail customers, respectively, report that they are transit reliant.

Key Takeaways

Perception of Community Value, Net Promoter Score (NPS), and Customer Satisfaction. Community impressions of RTD's personal value and value to the region have improved year over year and are significantly higher than national averages. Results show that 86% of community members believe that RTD provides value to the region, and 73% believe that RTD provides value to them personally. In comparison to national averages, RTD's value ratings for community value and personal value are 20% and 42% greater, respectively.

Increasing 36 points year over year, RTD's Community NPS is 14, which is 75 points higher than the national average. For reference, NPS is a measure of customer satisfaction with a product or service. Customers are asked to respond to the question of whether they would recommend the product or service to friends or relatives on a 10-point scale. The score is calculated by subtracting the percentage of individuals responding with a rating of 0-6 (detractors) from those responding with a rating of 9 or 10 (promoters).

Community NPS	2025	National Average	2024	2023
	14	-61	-22	-44

Compared to 2024, Customer NPS results are higher for fixed-route service and for Access-on-Demand service and slightly lower for Access-a-Ride service. The overall Customer NPS is 37, meaning the

agency has considerably more promoters than detractors, and bus and rail scores remain well above national averages. National benchmark data is not available for paratransit services for purposes of this comparison.

Mode	2025	National Average	2024	2023
Bus	26	-16	13	7
Light Rail	14	-3 (Rail Combined)	8	-2
Commuter Rail	47		15	47
Access-a-Ride	54		59	20
Access-on-Demand	81		67	58

Customer Satisfaction. Overall satisfaction with bus and rail services increased year over year. Among customer segments, 76% of bus customers and 75% of rail customers are satisfied or very satisfied with RTD's services in 2025, up from 68% and 63%, respectively, in 2024. RTD's customers are 20% more satisfied with bus service and 19% more satisfied with rail service than national averages.

Importance Factors: The list below represents the most important factors identified by community members as well as by customers by mode:

Community	Providing access to places of employment
Bus	Service frequency
Light Rail	Service frequency
Commuter Rail	Service frequency
Access-a-Ride	Vehicles arrive within scheduled pickup window
Access-on-Demand	Fare price

FINANCIAL IMPACT

The ongoing management of the Strategic Plan will not result in any direct financial impact at this time.

ATTACHMENTS:

- RTD 2025 Customer and Community Survey Results - Jun 12 (PPTX)

Prepared by:

John McKay, Chief of Staff

Approved by:

John McKay, Chief of Staff

6/18/2025

Authorized by:



Debra A. Johnson, General Manager and CEO 6/18/2025



We make lives better
through connections.

June 18, 2025

2025 Survey Results

Community and Customer

John McKay
Chief of Staff

Chris Tatham
CEO, ETC Institute

Overview

Introduction

Community Value Survey

- Net Promoter Score
- National Average Comparison
- Top Importance Key Driver Analysis

Customer Excellence Surveys – Bus, Rail, Paratransit

- Customer Characteristics
- Overall Customer Satisfaction
- Net Promoter Score
- National Average Comparison
- Top Importance and Key Driver Analysis

Summary/Conclusion

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Introduction/Survey Overview



Community Value

Collection Period

April 2025

Collection Method

Mail, email, text



Customer Excellence: Paratransit

April 2025

Mail, email, text



Customer Excellence: Rail

April 2025

Customer intercept



Customer Excellence: Bus

April 2025

Customer intercept

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Community Value Survey

Methodology: Community Survey



- § Distribution: mailed to random sample of households in the Denver metro area
- § Survey period: April 8 through April 20, 2025
- § Results monitored to maintain demographic distribution in proportion to the region
- § Target sample: 400 surveys
- § 770 completed surveys (+/- 3.8% at the 95% confidence level)

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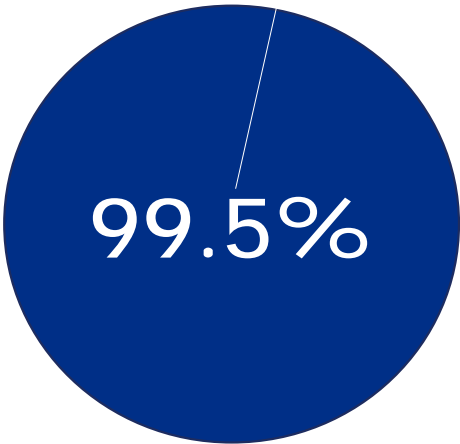
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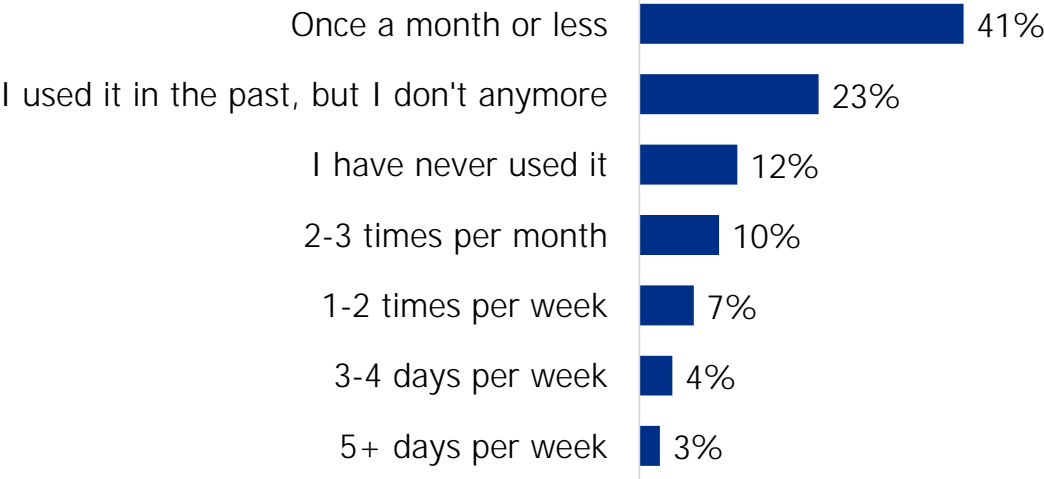
Awareness and Frequency



Are you aware of RTD, the public transportation system that operates bus, rail and paratransit services in the Denver Metro region?



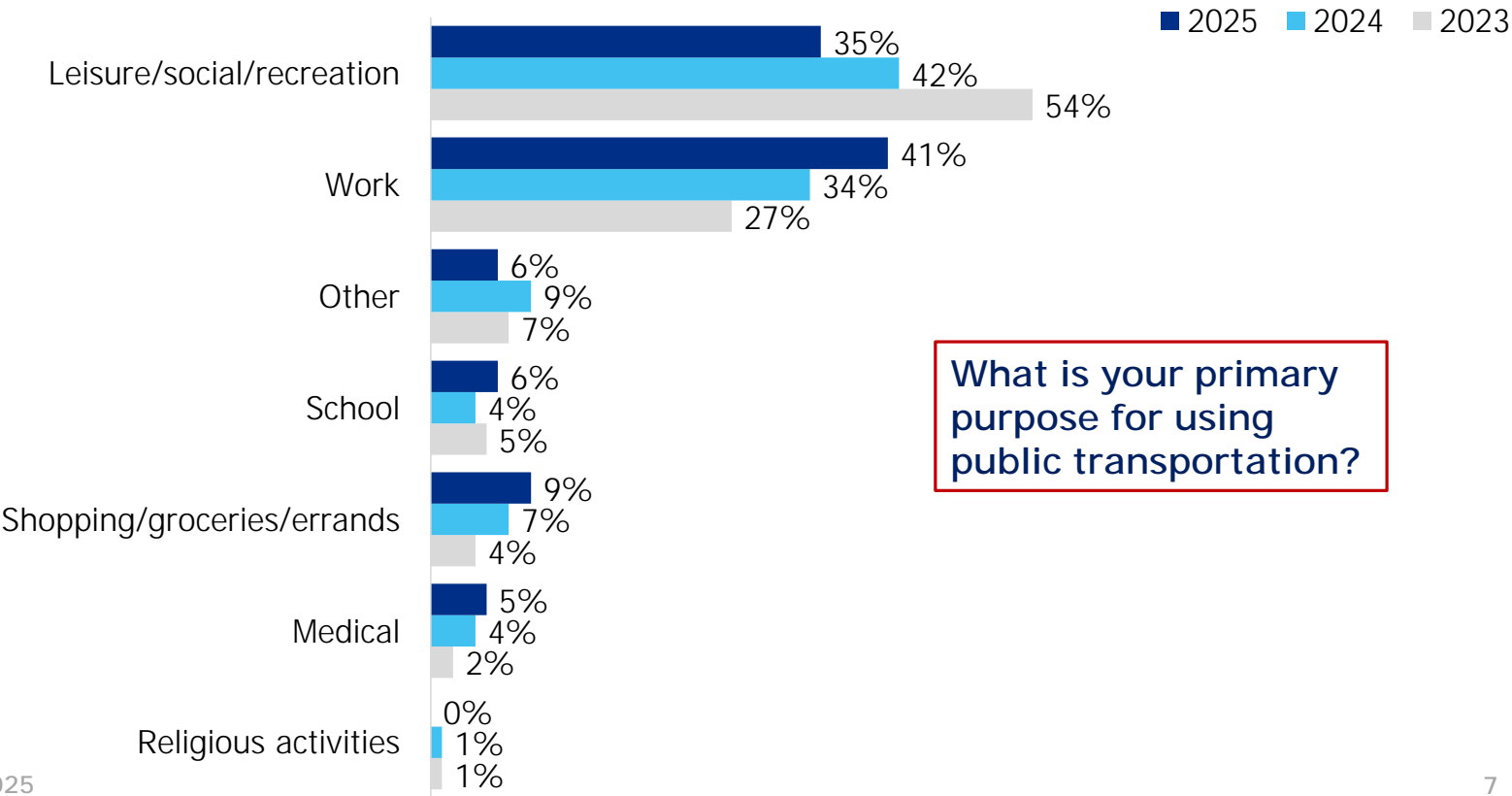
On average, how often do you use RTD?



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Reasons for Public Transportation Use



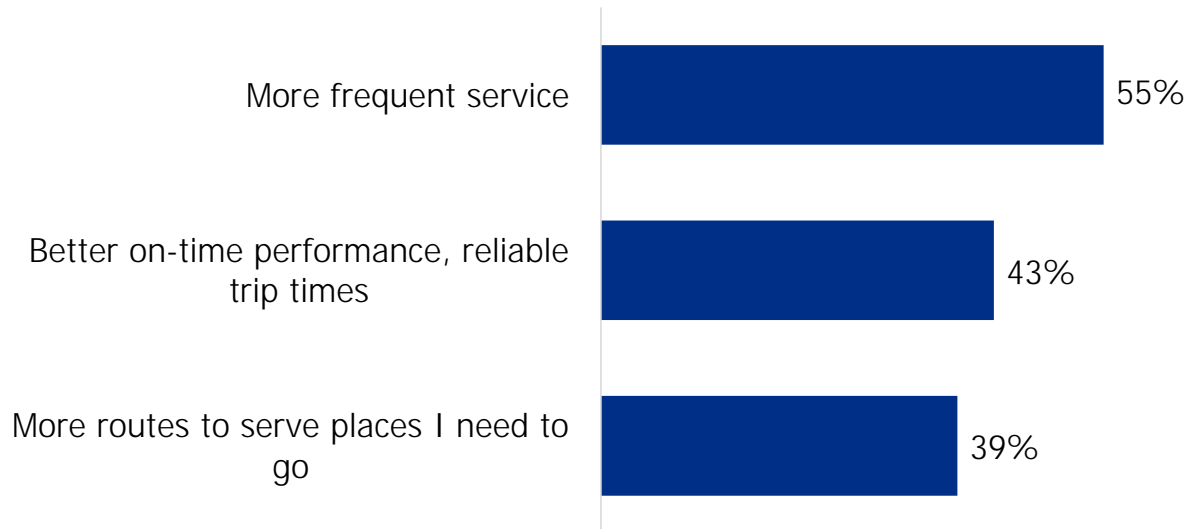
What is your primary purpose for using public transportation?

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Three features that RTD could add to its current service that would make it more appealing for you to use public transportation



Additional choices:

4. Additional security/fare inspectors
5. Shorter trip times
6. Lower fares
7. Stops closer to my home
8. Shelter at transit stops/stations
9. Cleaner vehicles
10. Free, reliable WiFi access on RTD vehicles

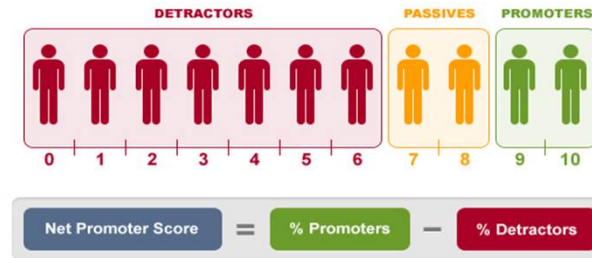
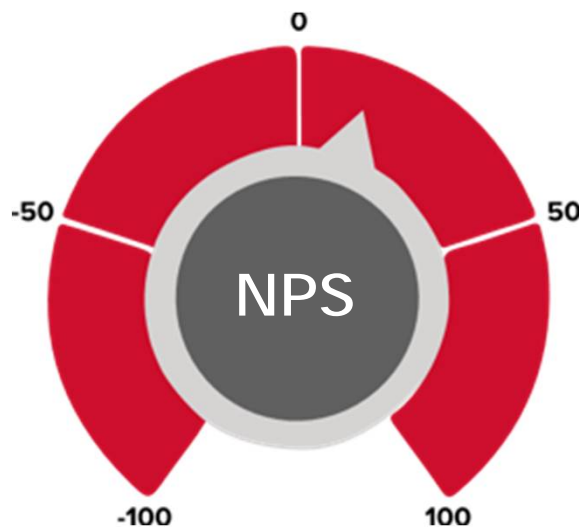
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Net Promoter Score (NPS)

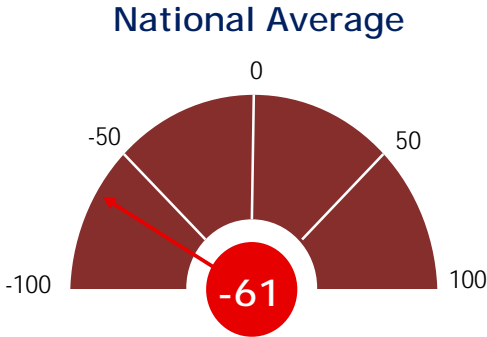
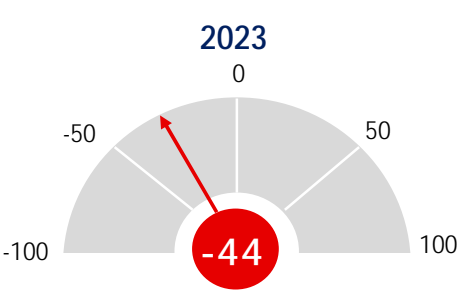
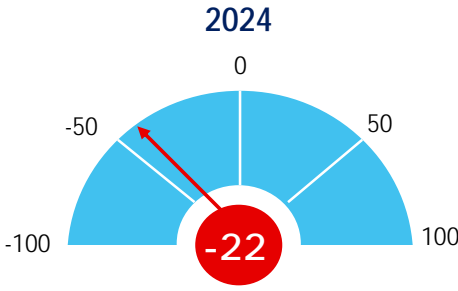
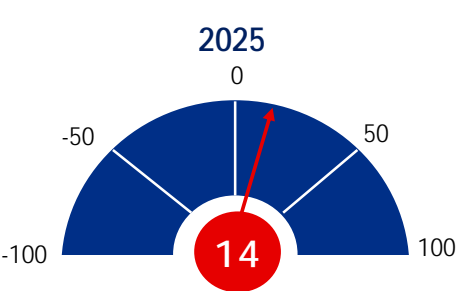
How likely are you to recommend RTD to a friend or neighbor?



- § Measured on a scale of -100 to +100
- § $\% \text{ Promoters} - \% \text{ Detractors} = \text{NPS}$
- § NPS traditionally measures customer's willingness to recommend product or service



Net Promoter Score: Community



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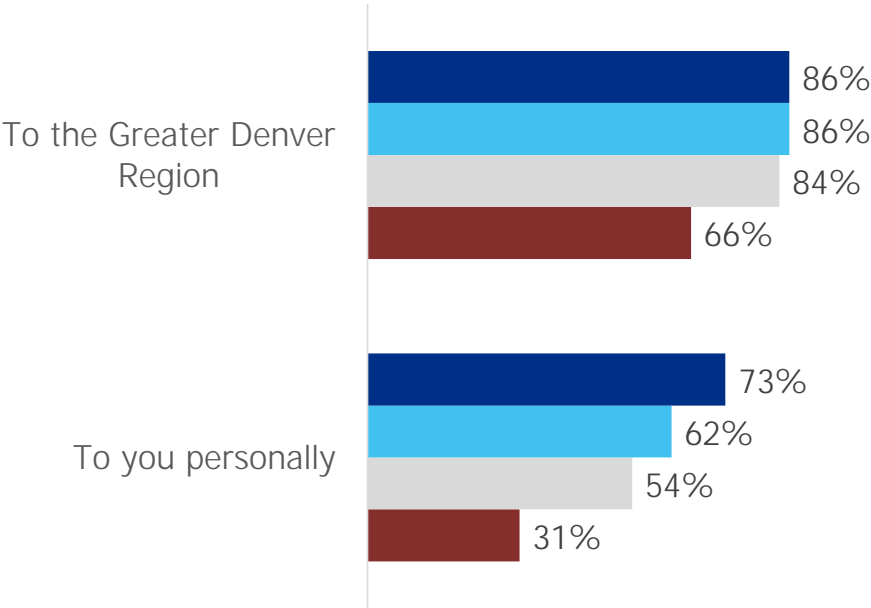


RTD Value

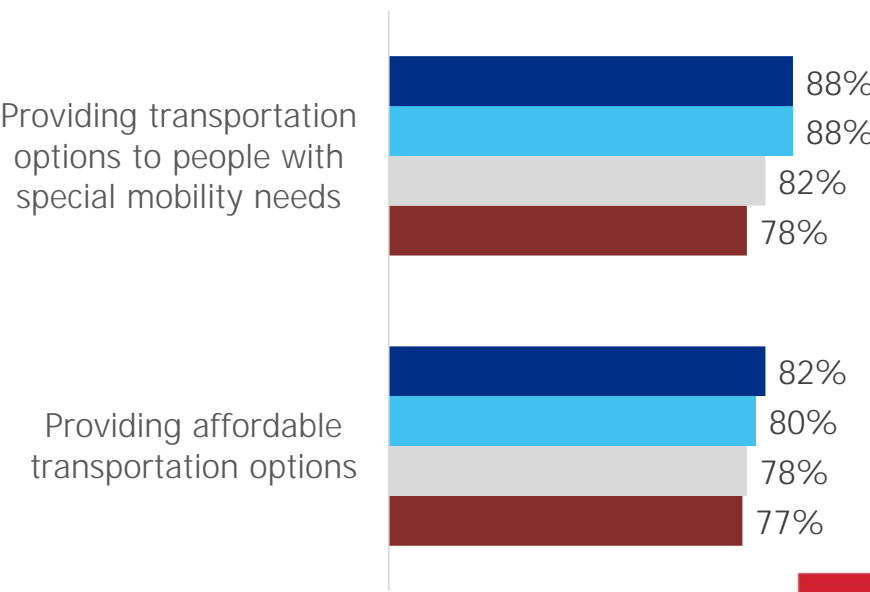


How valuable is RTD:

■ RTD 2025 ■ RTD 2024 ■ RTD 2023 ■ National Average



■ RTD 2025 ■ RTD 2024 ■ RTD 2023 ■ National Average

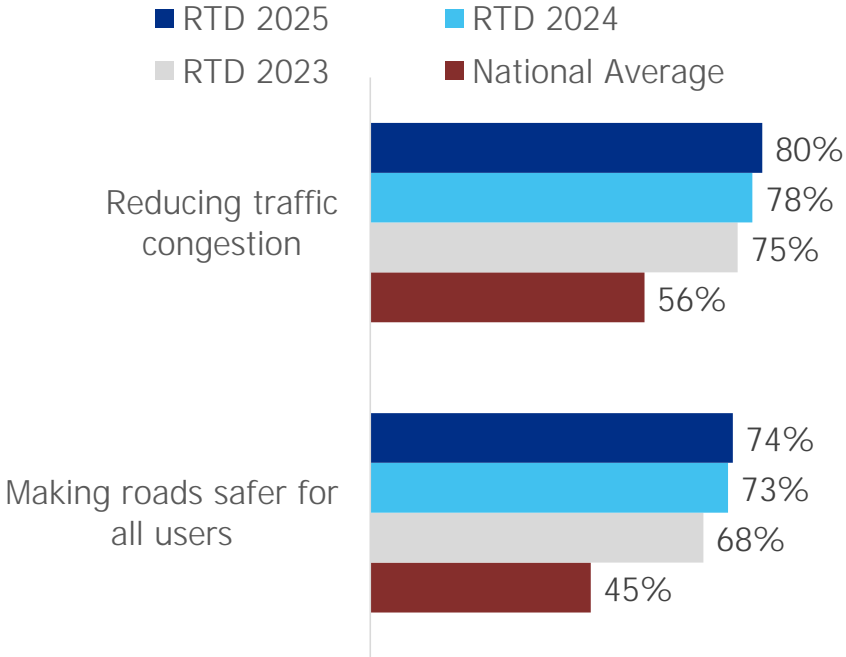
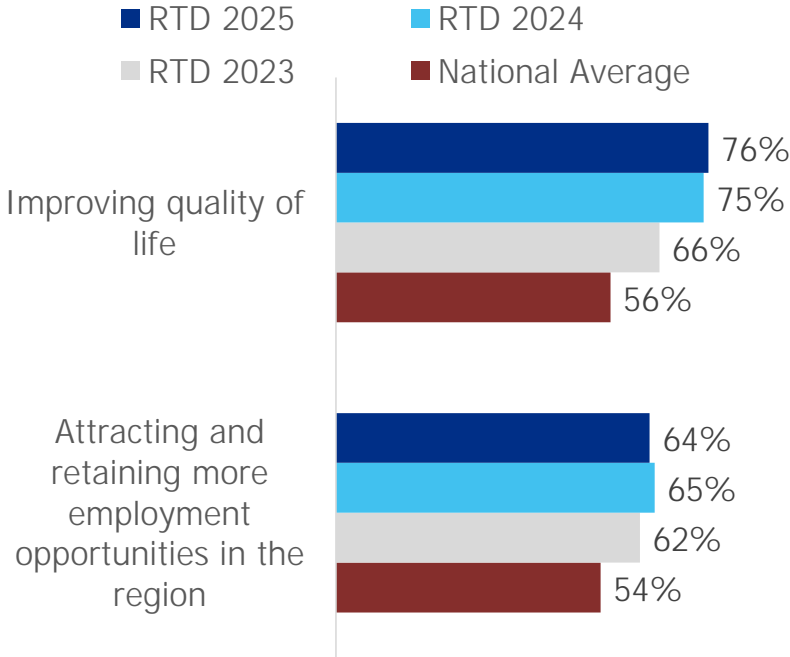


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% Valuable and Extremely Valuable



RTD Value (cont'd)



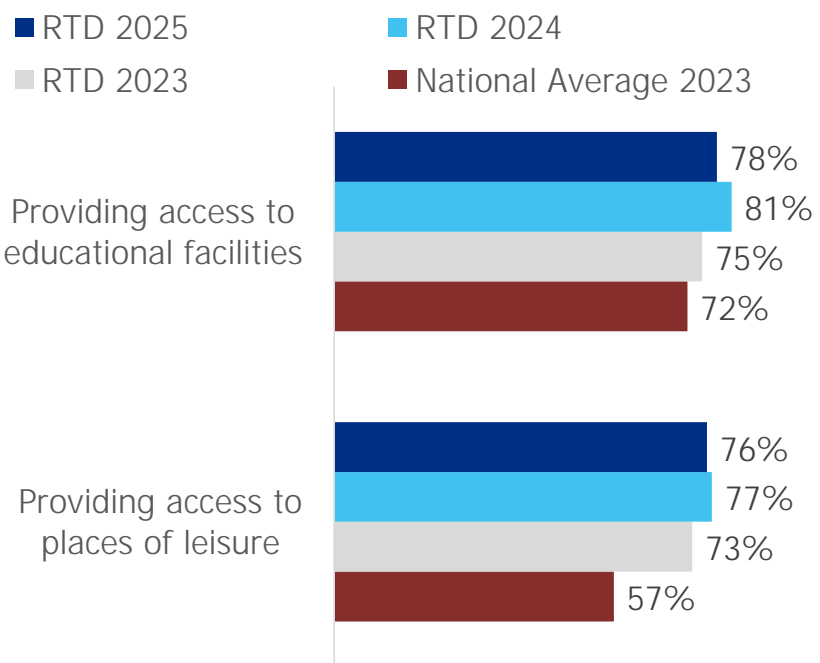
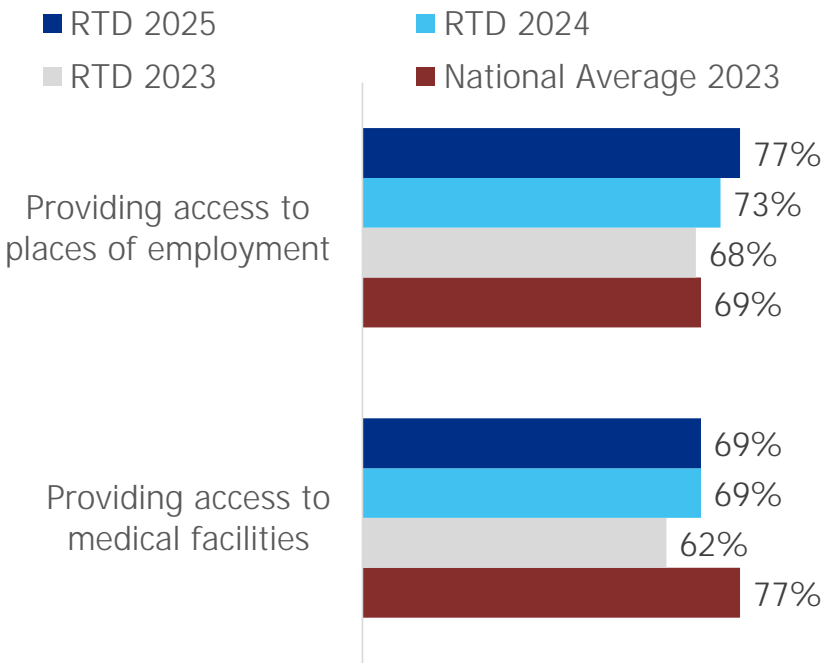
June 18, 2025

% Valuable and Extremely Valuable

12



RTD Value (cont'd)



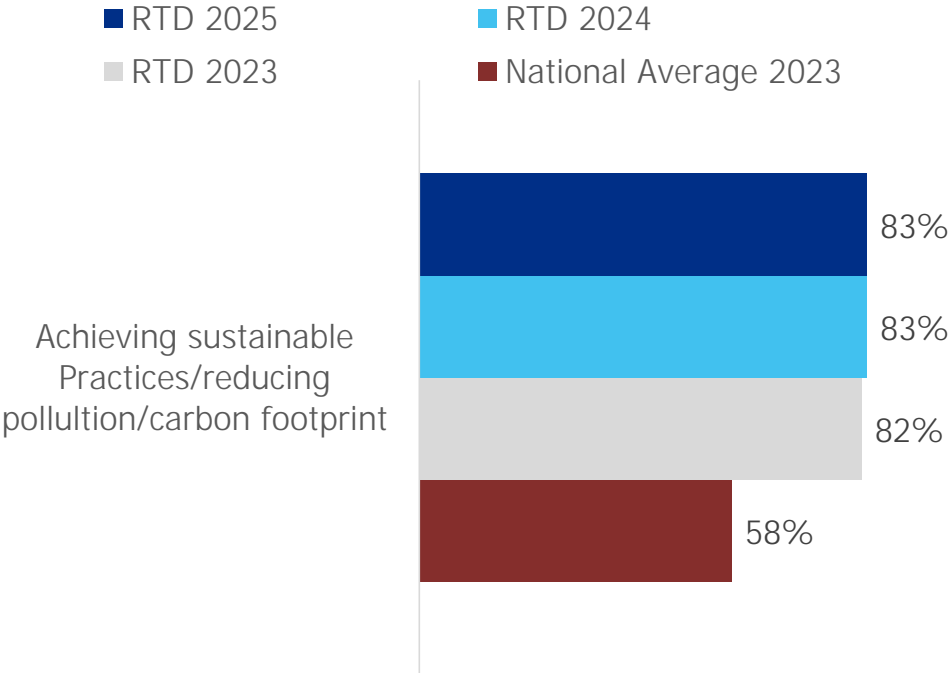
June 18, 2025

% Valuable and Extremely Valuable

13



RTD Value (cont'd)

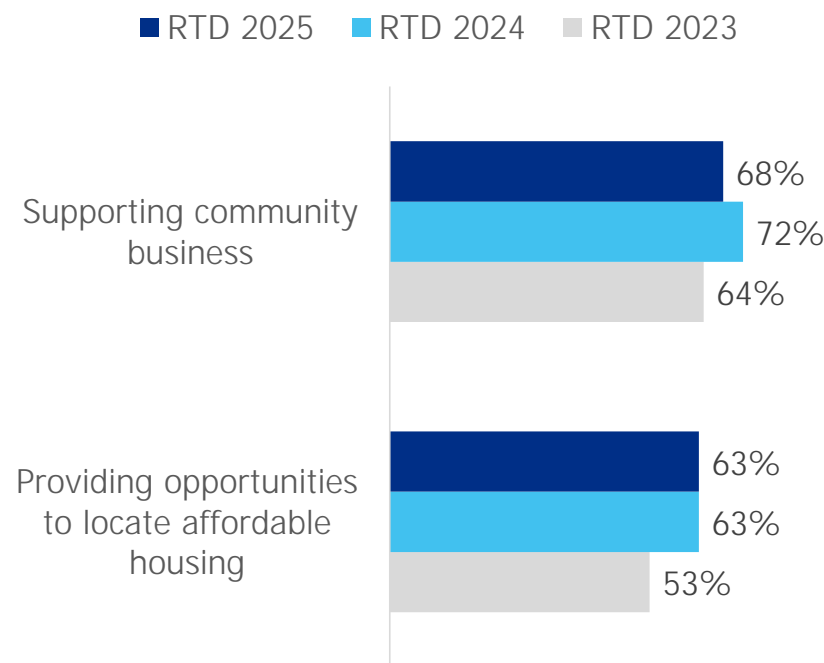
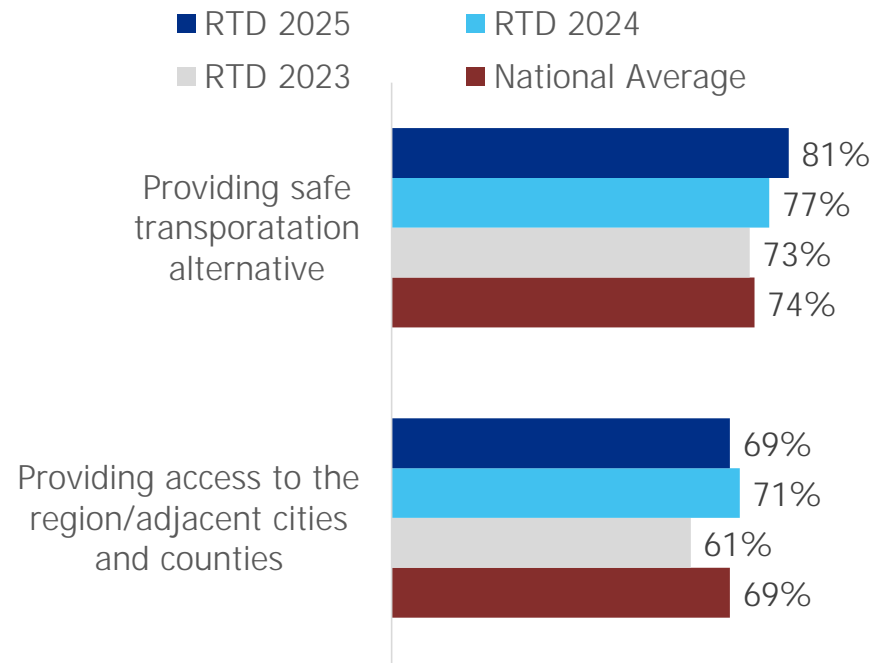


% Valuable and Extremely Valuable

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RTD Value (cont'd)



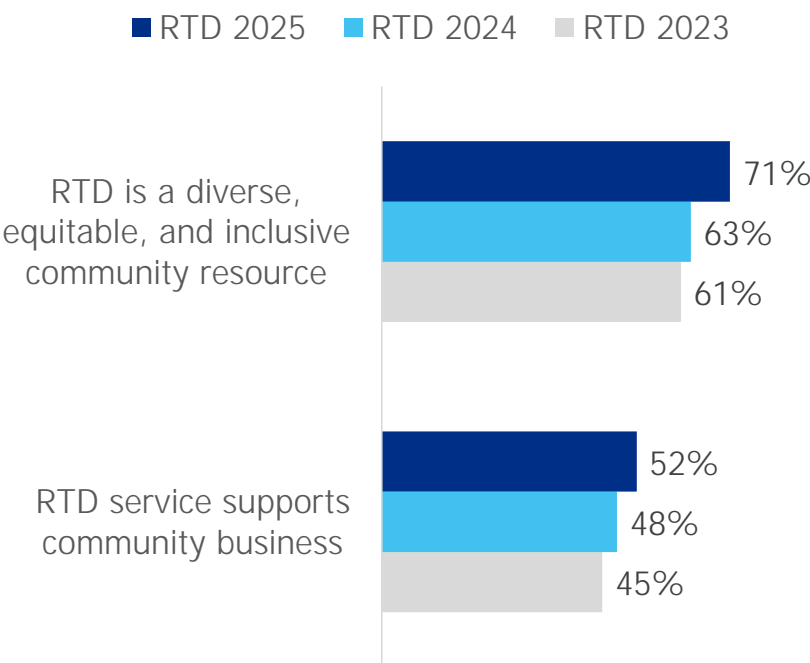
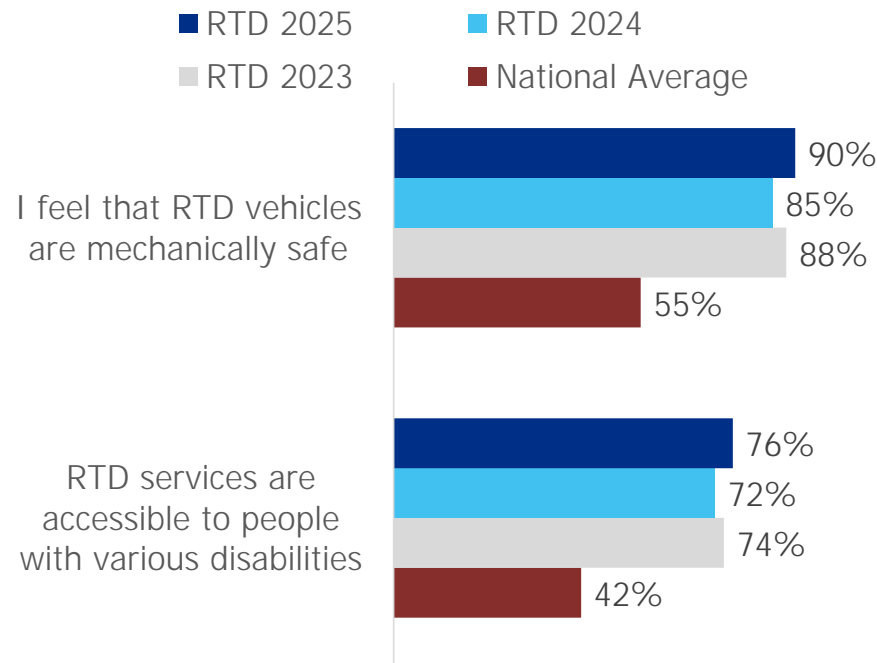
% Valuable and Extremely Valuable

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Service-Related Favorability (cont'd)



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% Agree and Strongly Agree

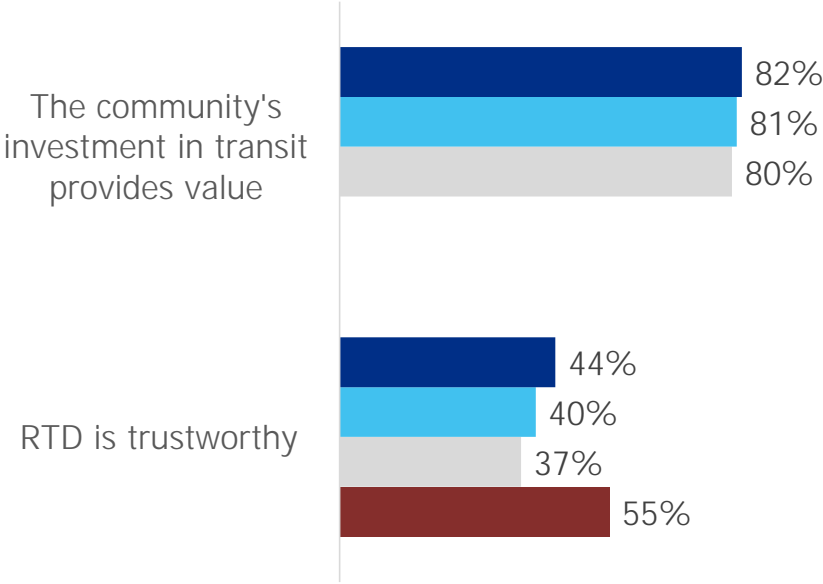
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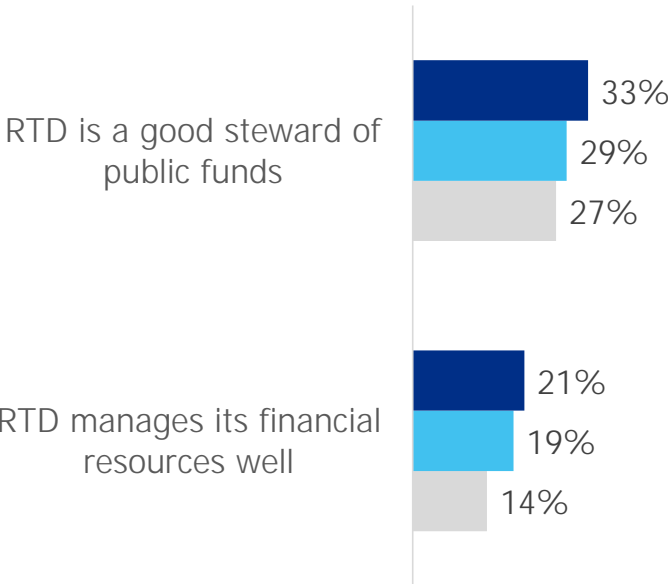
Service-Related Favorability (cont'd)



■ RTD 2025 ■ RTD 2024 ■ RTD 2023 ■ National Average



■ RTD 2025 ■ RTD 2024 ■ RTD 2023



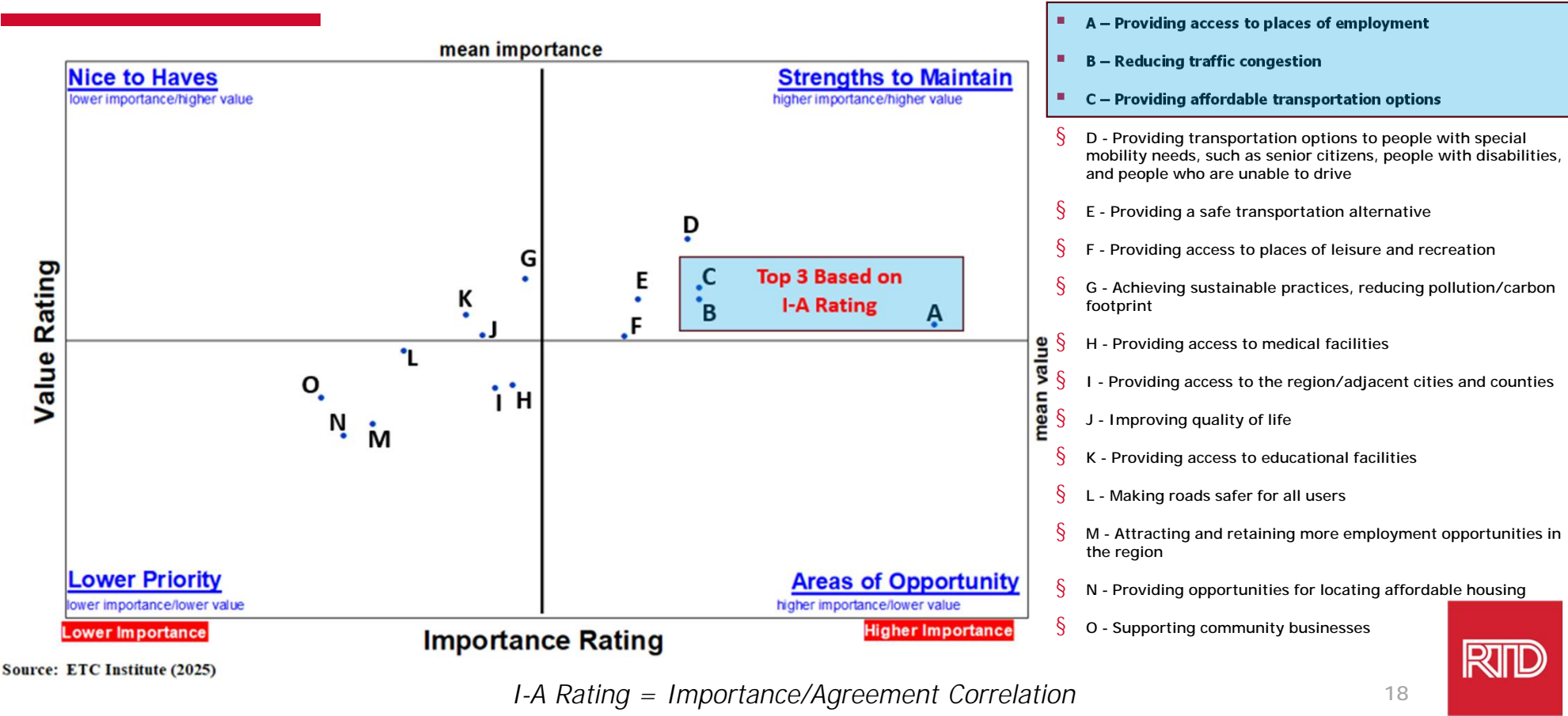
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% Agree and Strongly Agree

17



Key Driver Analysis: Community 2025



Source: ETC Institute (2025)



Customer Excellence Survey

Methodology: Bus and Rail Surveys

- § Customer intercepts
- § Survey period: April 7 through April 14, 2025
- § Target sample: 1,200 (+/- 2.8% at the 95% confidence level)
- § 1,821 completed surveys
- § Every route/line sampled in proportion to Spring 2025 ridership

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Key Takeaways

- § RTD is still setting the standard for customer experience with bus and rail service in most areas
- § Overall satisfaction increased in almost every area that was rated:
 - Ratings improved in 19 of 19 areas for Bus
 - Ratings improved in 19 of 19 areas for Commuter Rail
 - Ratings improved in 16 of 19 areas for Light Rail
 - Overall NPS score increased as well across all transit services
- § Service frequency is identified as an opportunity area for Bus, Light Rail, and Commuter Rail

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Customer Characteristics All Modes

Customer Characteristics



- § Most likely to be **male** and **18-39 years old**
- § 42% White or Caucasian
- § 21% Hispanic, Spanish, or Latino/a/x
- § 20% Black/African American
- § 63% reported household incomes less than \$50,000



- § Most likely to be **male** and **18-39 years old**
- § 50% White or Caucasian
- § 17% Hispanic, Spanish, or Latino/a/x
- § 12% Black/African American
- § 40% reported household incomes less than \$50,000



- § Most likely to be **female** and over **65 years old**
- § AaR: 64% AoD: 66% White or Caucasian
- § AaR: 16% AoD: 12% Hispanic, Spanish, or Latino/a/x
- § AaR: 18% AoD: 15% Black/African American
- § AaR: 86% AoD: 90% reported household incomes less than \$50,000

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AaR = Access-a-Ride

AoD = Access-on-Demand

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Customer Characteristics (cont'd)



- § 71% use bus service three or more days a week
- § 78% are reliant on bus service
- § 52% use buses to commute to and from work



- § 59% use rail three or more days a week
- § 65% are reliant on rail services
- § 48% uses trains to commute to and from work



- § AaR: 52% of users surveyed use AaR for most of their trips
- § AaR: 41% use services for medical appointments
- § AoD: 74% of users surveyed use AoD for making most of their trips
- § AoD: 45% use services for medical appointments

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AaR = Access-a-Ride

AoD = Access-on-Demand

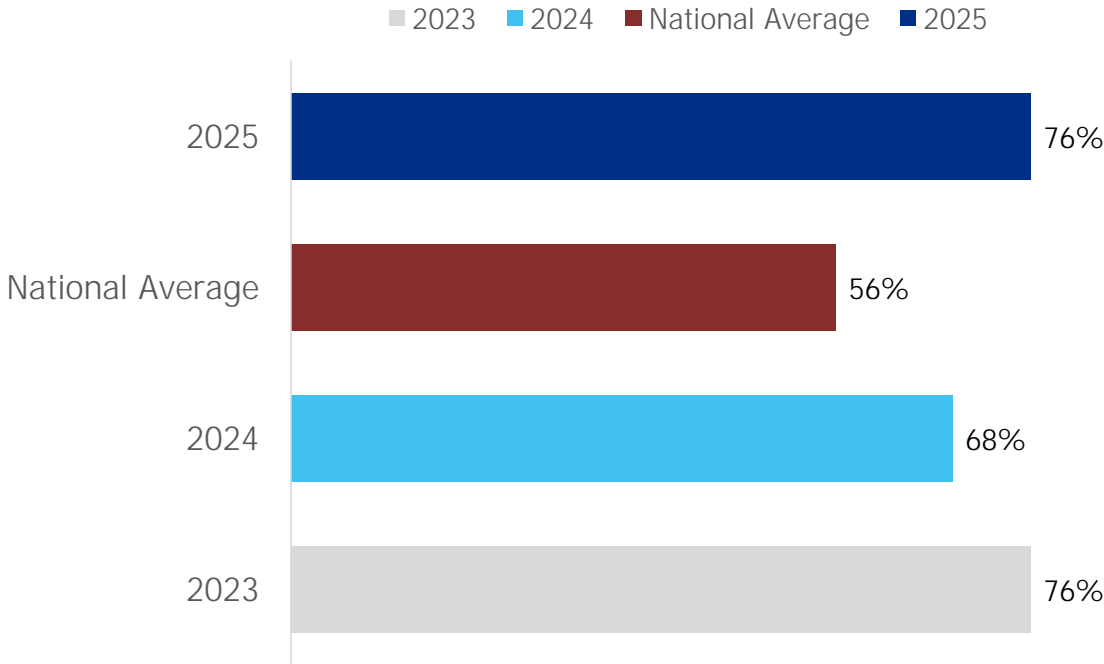
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Overall Customer Satisfaction Bus/Rail

Overall Satisfaction: Bus

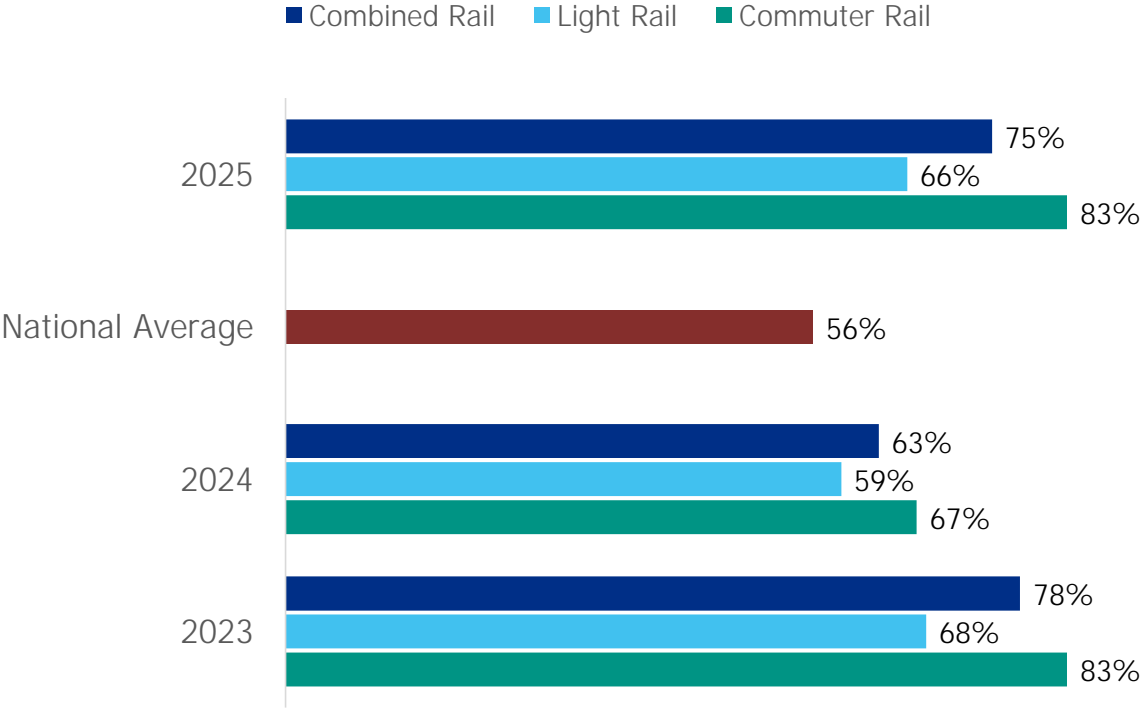


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**Responses for customer selection "Satisfied" and "Very Satisfied"*



Overall Satisfaction: Rail



**Responses for customer selection "Satisfied" and "Very Satisfied"*

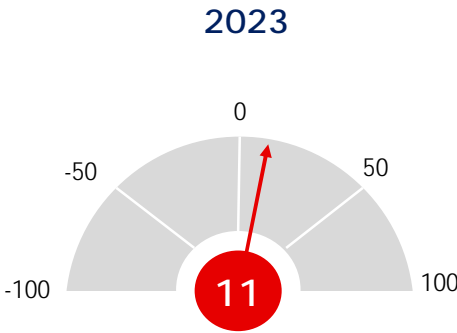
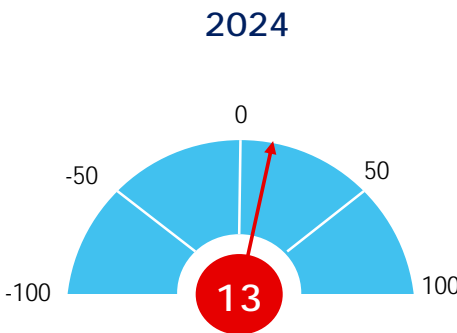
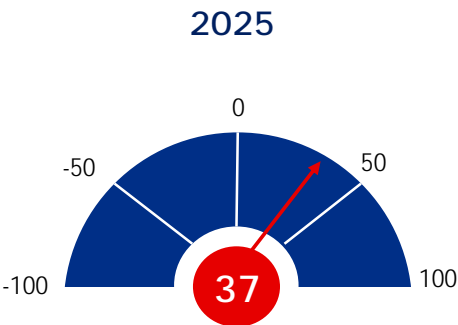
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Net Promoter Score

Compostive Customer NPS (Bus, Rail, and Paratransit Combined)



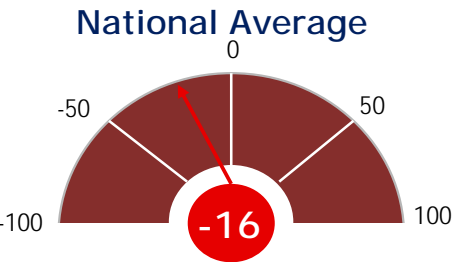
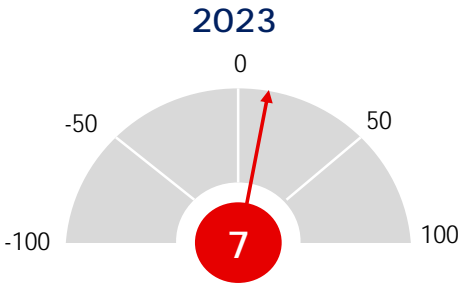
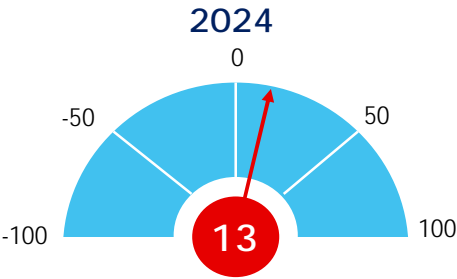
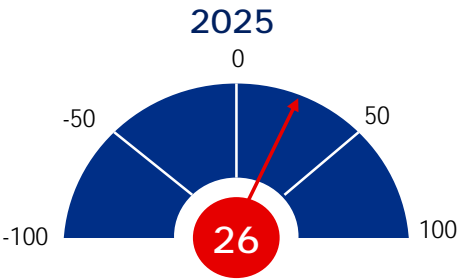
- § 0-20 is Good
- § 21-50 is Favorable
- § 51-80 is Excellent
- § 81-100 is World Class

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Bus NPS

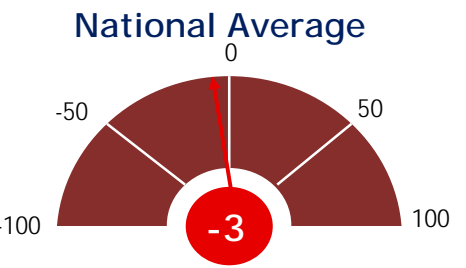
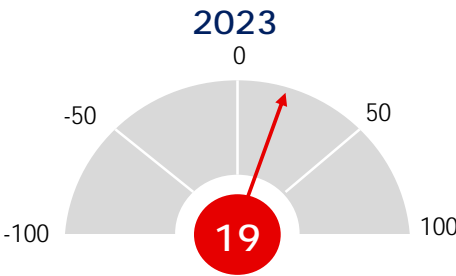
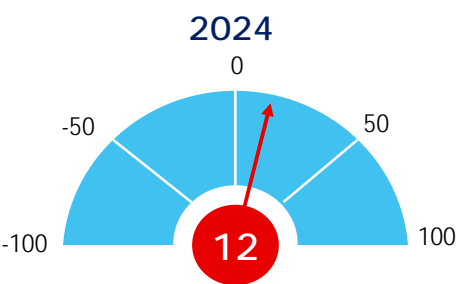
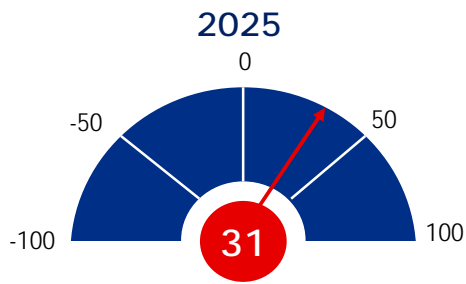


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Rail NPS



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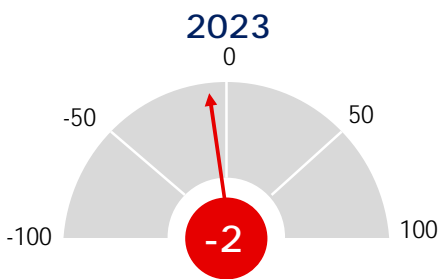
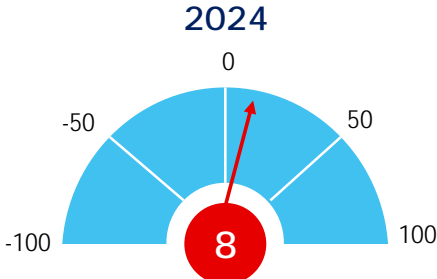
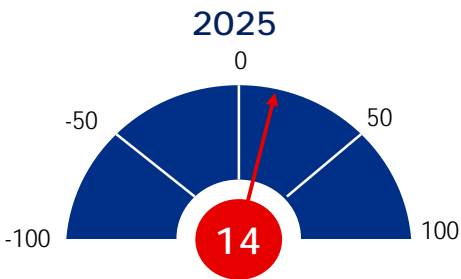
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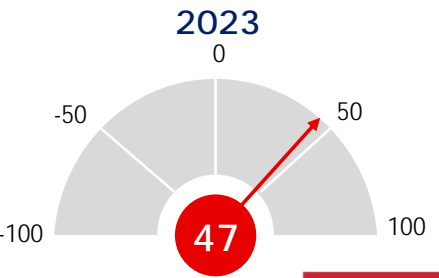
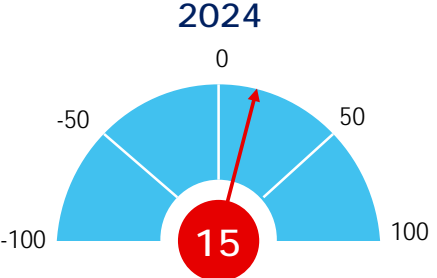
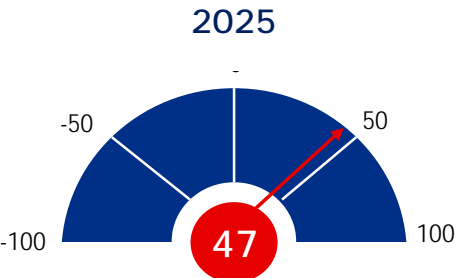
Rail NPS (cont'd)



Light Rail



Commuter Rail



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Attachment: RTD 2025 Customer and Community Survey Results - Jun 12 (5149 : 2025 Customer and

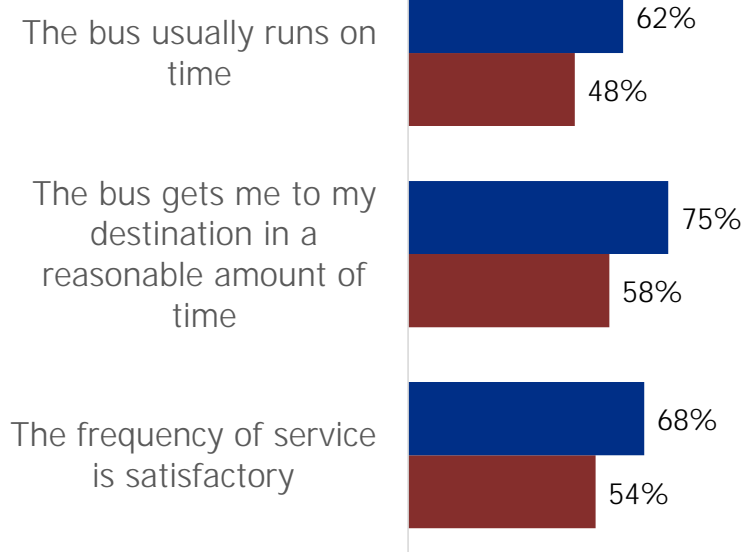


National Average Comparison

Performance



■ RTD Bus ■ National Average

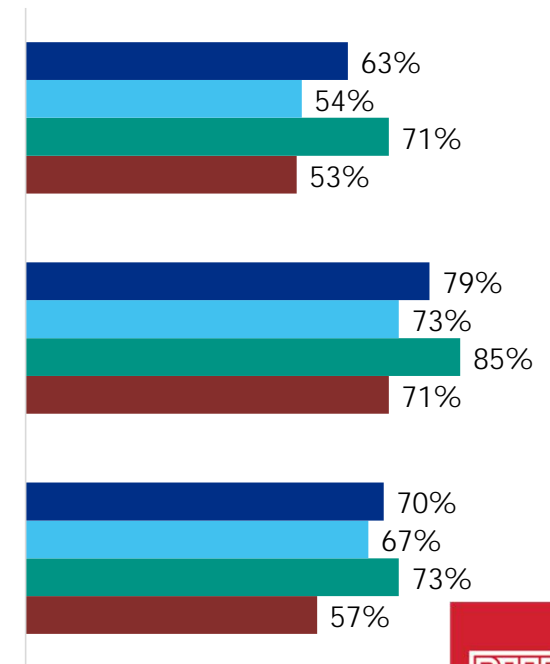


■ RTD Rail (combined) ■ RTD Light Rail
■ RTD Commuter Rail ■ National Average

The train usually runs on time

The train gets me to my destination in a reasonable time

The frequency of service is satisfactory



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Access



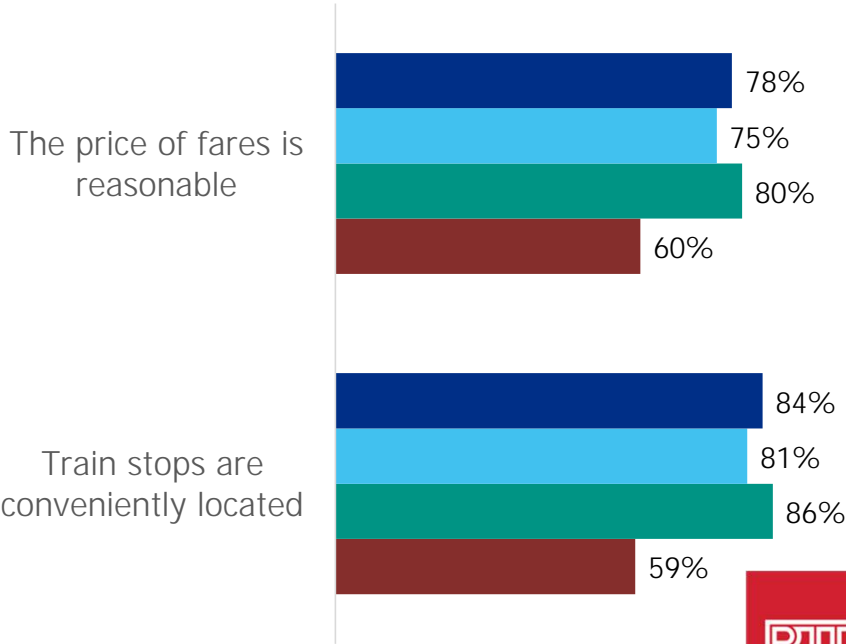
■ RTD Bus ■ National Average



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■ RTD Rail (combined) ■ RTD Light Rail
■ RTD Commuter Rail ■ National Average



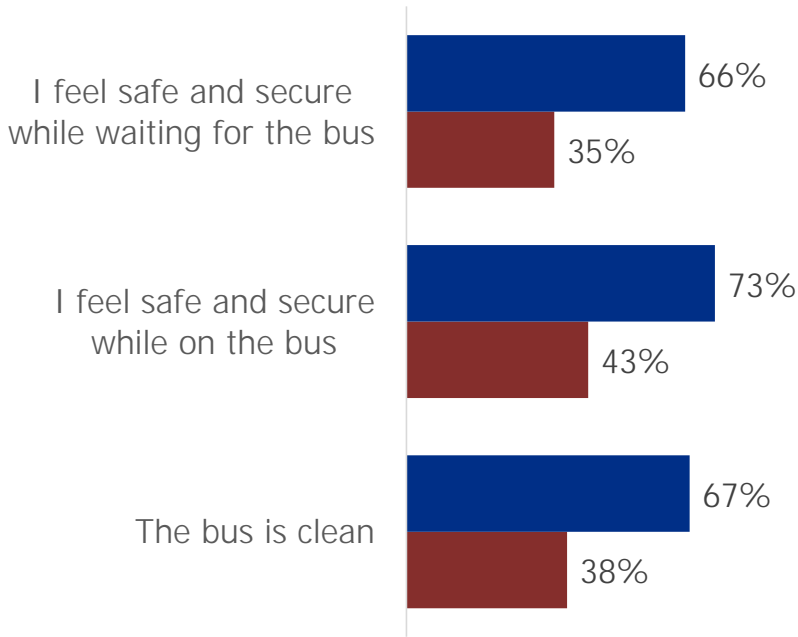
35



Personal Safety and Comfort



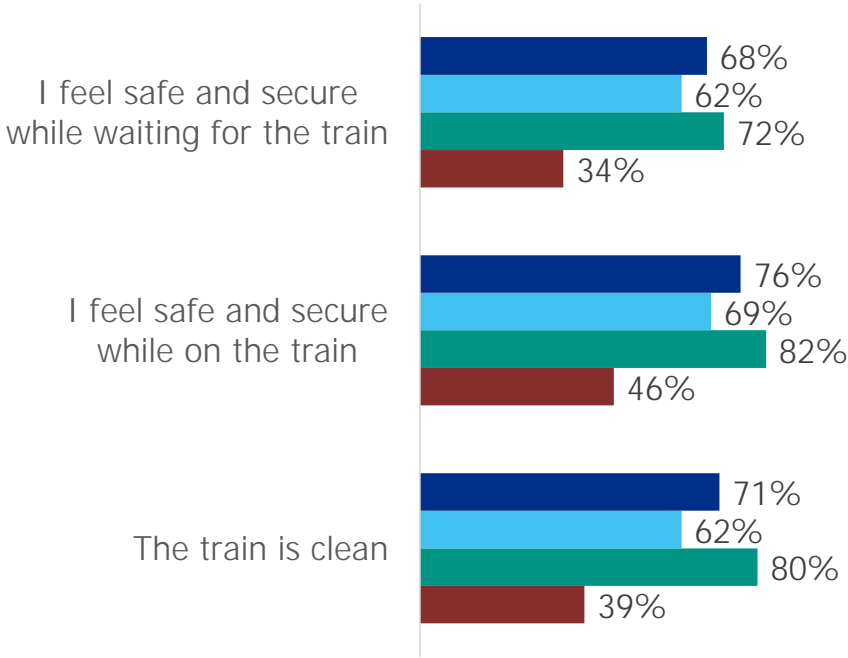
■ RTD Bus ■ National Average



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■ RTD Rail (combined) ■ RTD Light Rail
■ RTD Commuter Rail ■ National Average



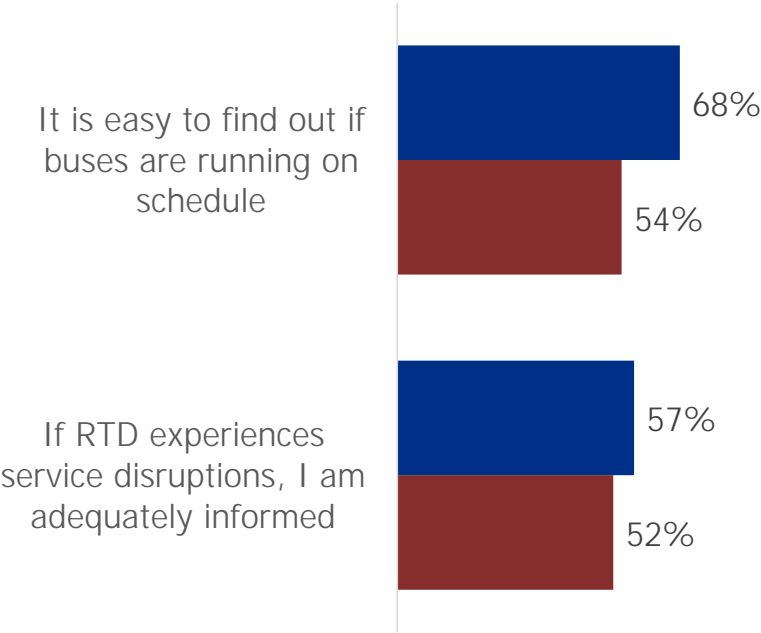
36



Information



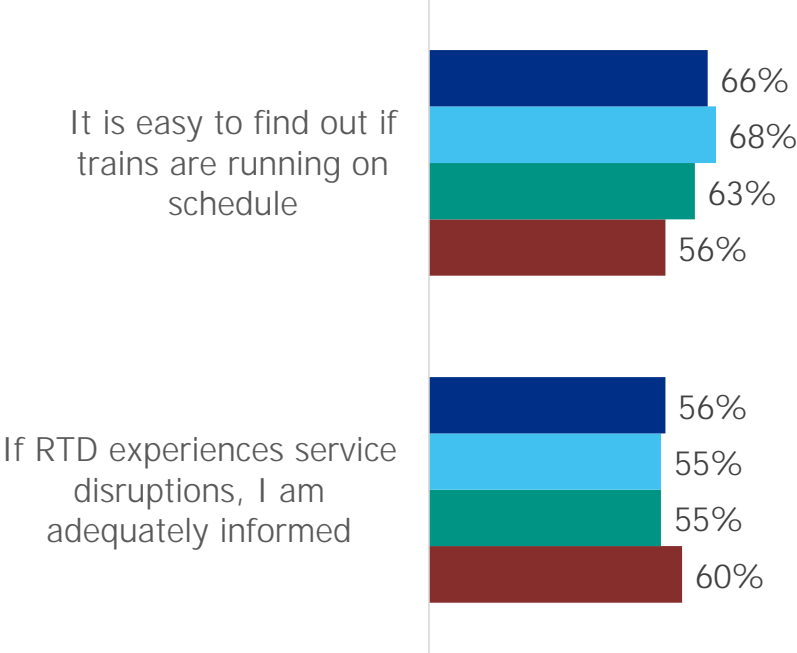
■ RTD Bus ■ National Average



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■ RTD Rail (combined) ■ RTD Light Rail
■ RTD Commuter Rail ■ National Average



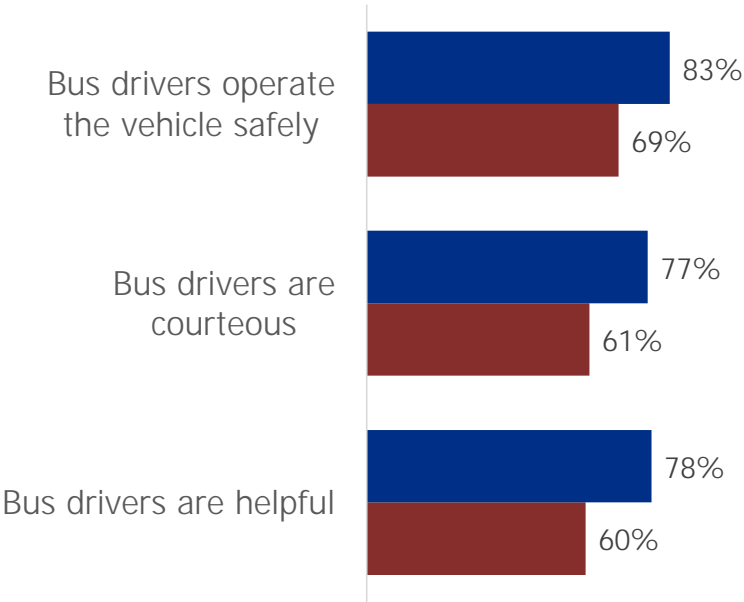
37



Driver (Operator) Behavior



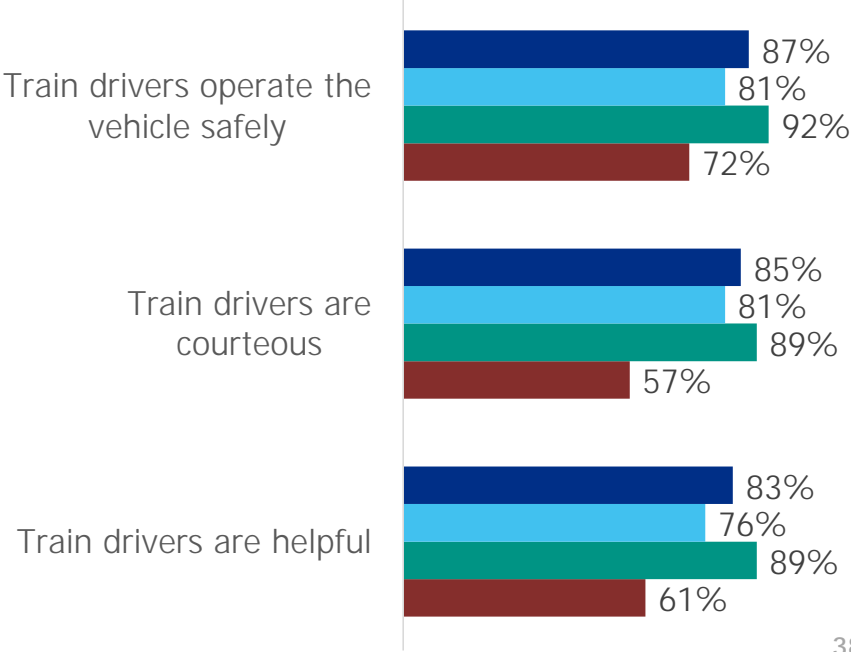
■ RTD Bus ■ National Average



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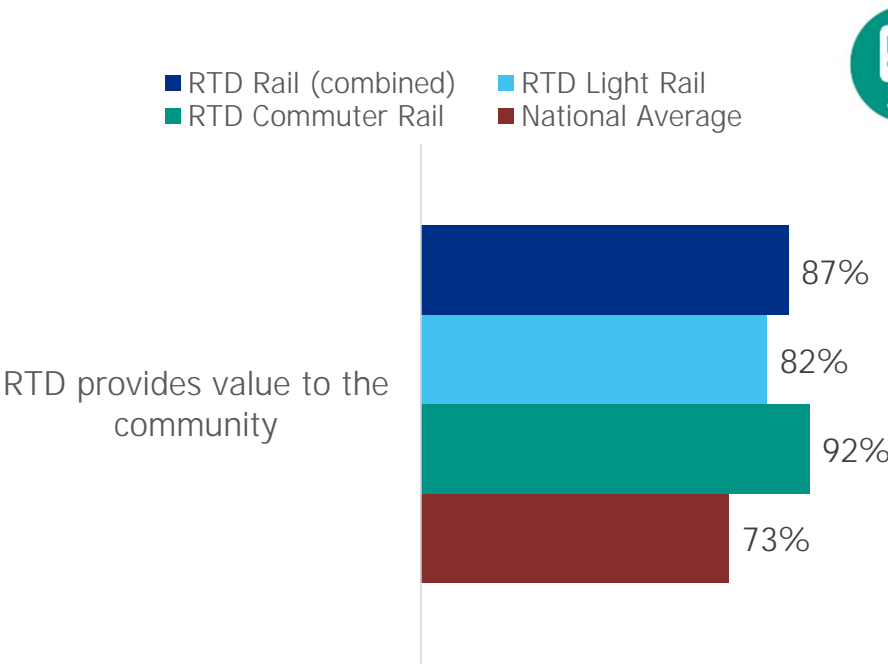
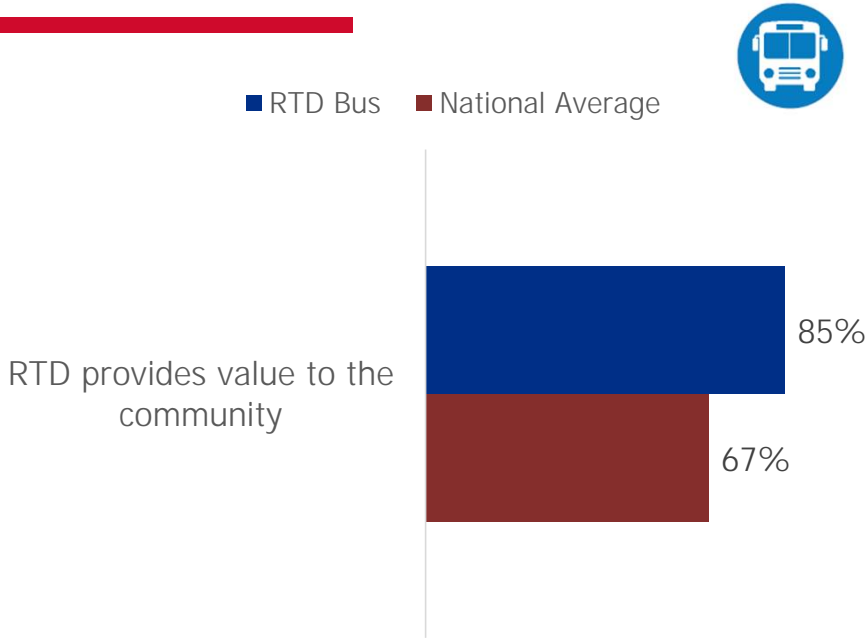
■ RTD Rail (combined) ■ RTD Light Rail
■ RTD Commuter Rail ■ National Average



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Community Value



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Trends Summary



BUS

§ Ratings improved in all 19 areas assessed. Largest increases were:

- Bus cleanliness (+13%)
- Personal security while waiting for bus (+11%)
- Personal security on bus (+11%)
- Ease of finding out if buses are running on schedule (+11%)



COMMUTER RAIL

§ Ratings improved in all 19 areas assessed. Largest increases were:

- Train cleanliness (+25%)
- Personal security on train (+21%)
- Timely arrival of trains (+16%)
- Personal security while waiting for train (+15%)



LIGHT RAIL

§ Ratings improved in 16 of 19 areas assessed. Largest increases were:

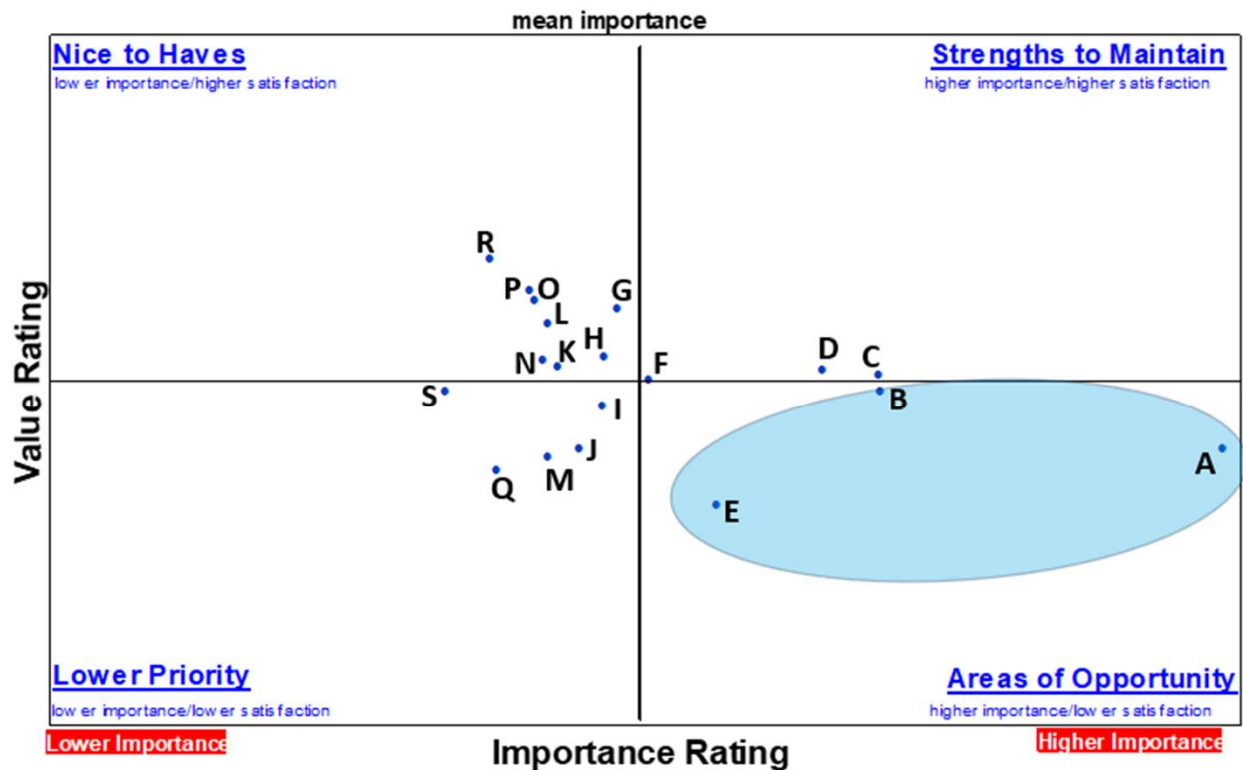
- Ease of finding out if trains are running on schedule (+11%)
- Personal security while waiting for train (+9%)
- Frequency (how often trains come) (+9%)
- Train cleanliness (+8%)





Top Importance and Key Driver Analyses

Key Driver Analysis: Bus



■ **A - Frequency (how often buses/trains come)**

■ **B - Hours of operation**

§ C - Bus/train stops conveniently located

§ D - Fare price

■ **E - Timely arrival of buses/trains**

§ F - Travel time

§ G - Buses/trains being operated safely

§ H - Helpful drivers

§ I - Personal security on bus/train

§ J - Ease of finding out if buses/trains are running on schedule

§ K - Accuracy of route schedules and maps

§ L - Availability of route schedules and maps

§ M - Bus/train cleanliness

§ N - Courteous drivers

§ O - Access to key public service destinations

§ P - RTD system provides value to the community

§ Q - Personal security while waiting for bus/train

§ R - Mechanical safety of bus/train

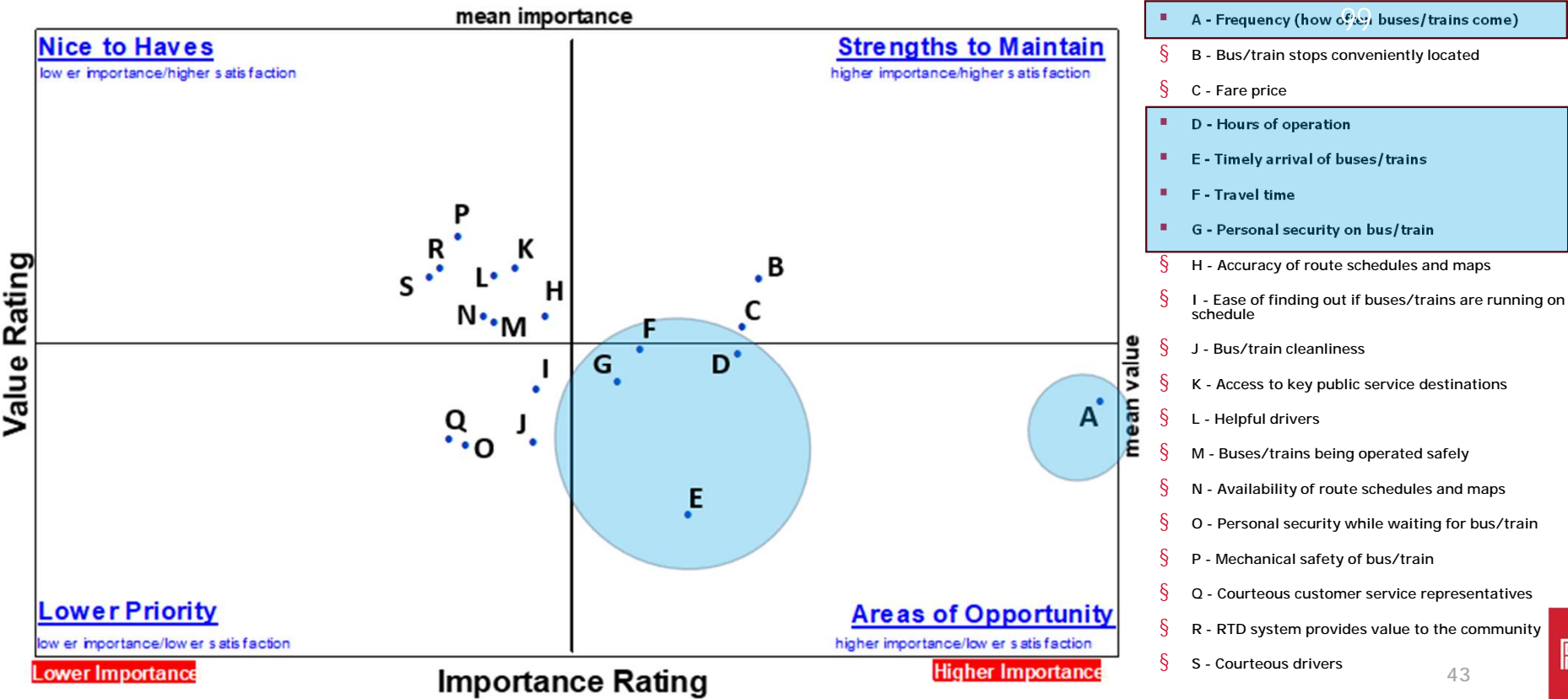
§ S - Courteous customer service representatives



RTD

Source: ETC Institute (2025)

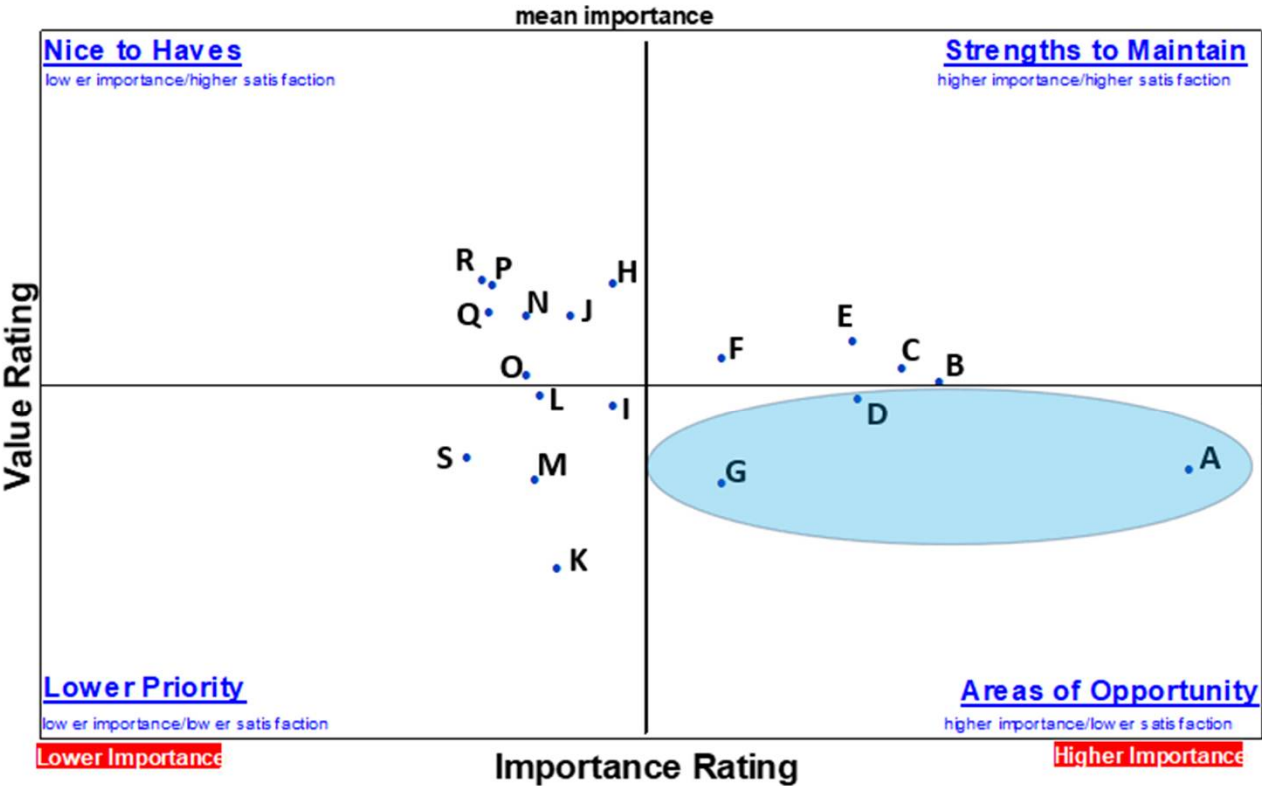
Key Driver Analysis: Light Rail



Source: ETC Institute (2025)



Key Driver Analysis: Commuter Rail



- A - Frequency (how often buses/trains come)
- B - Hours of operation
- C - Fare price
- D - Bus/train stops conveniently located
- E - Travel time
- F - Timely arrival of buses/trains
- G - Personal security on bus/train
- H - Buses/trains being operated safely
- I - Bus/train cleanliness
- J - Access to key public service destinations
- K - Ease of finding out if buses/trains are running on schedule
- L - Accuracy of route schedules and maps
- M - Personal security while waiting for bus/train
- N - Availability of route schedules and maps
- O - Helpful drivers
- P - RTD system provides value to the community
- Q - Courteous drivers
- R - Mechanical safety of bus/train
- S - Courteous customer service representatives

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Source: ETC Institute (2025)



Customer Excellence Survey – Paratransit

Methodology: Paratransit Surveys

- § Distribution: mail, email, and text message delivered to active, eligible, registered customers
- § Survey period: April 7 to April 23, 2025
- § Target sample: 400 (+/- 4.9% at the 95% confidence level)
- § 444 completed surveys



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Overall Satisfaction: Paratransit



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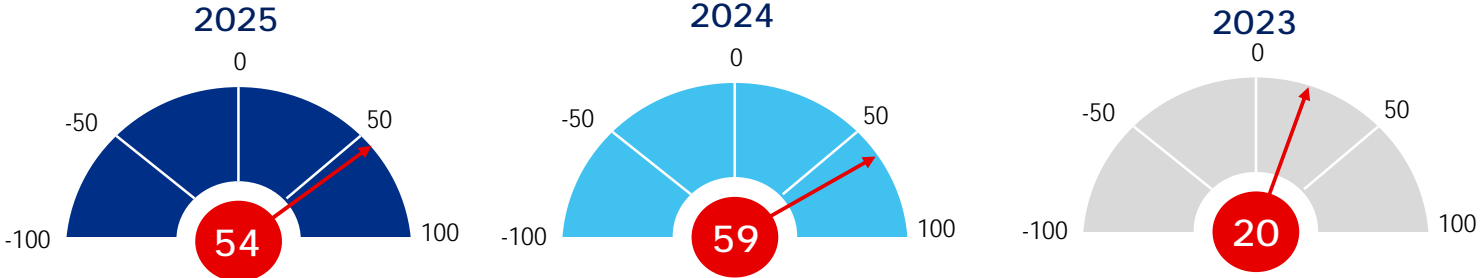
47



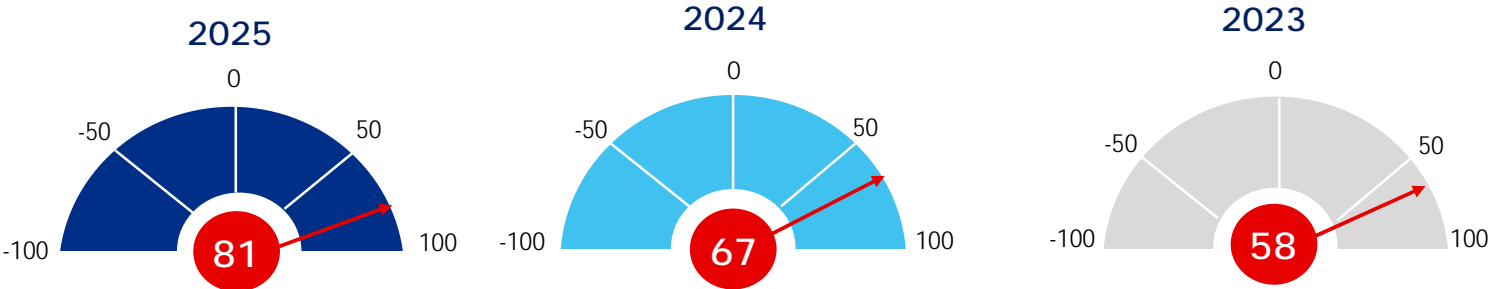
Paratransit NPS



Access-a-Ride



Access-on-Demand

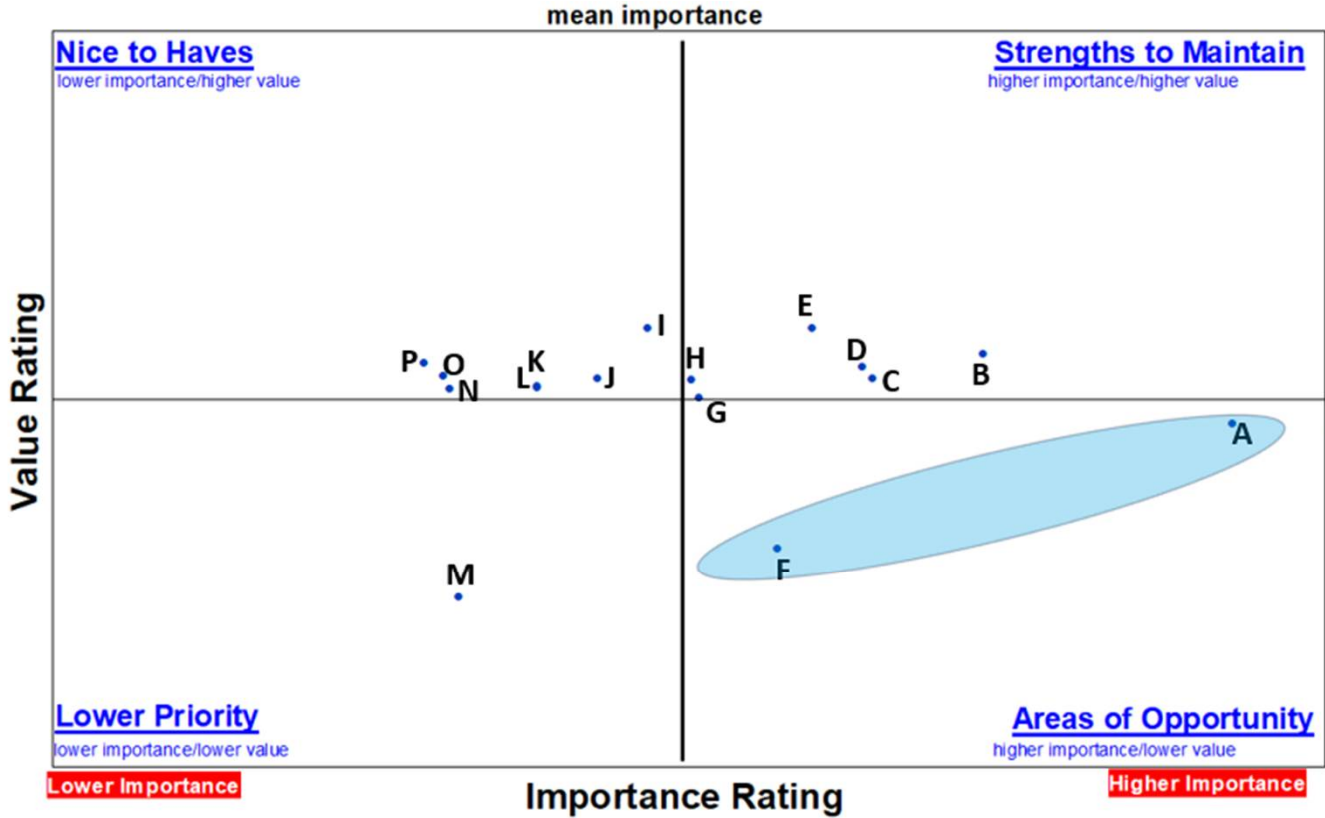


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Key Driver Analysis: Access-a-Ride

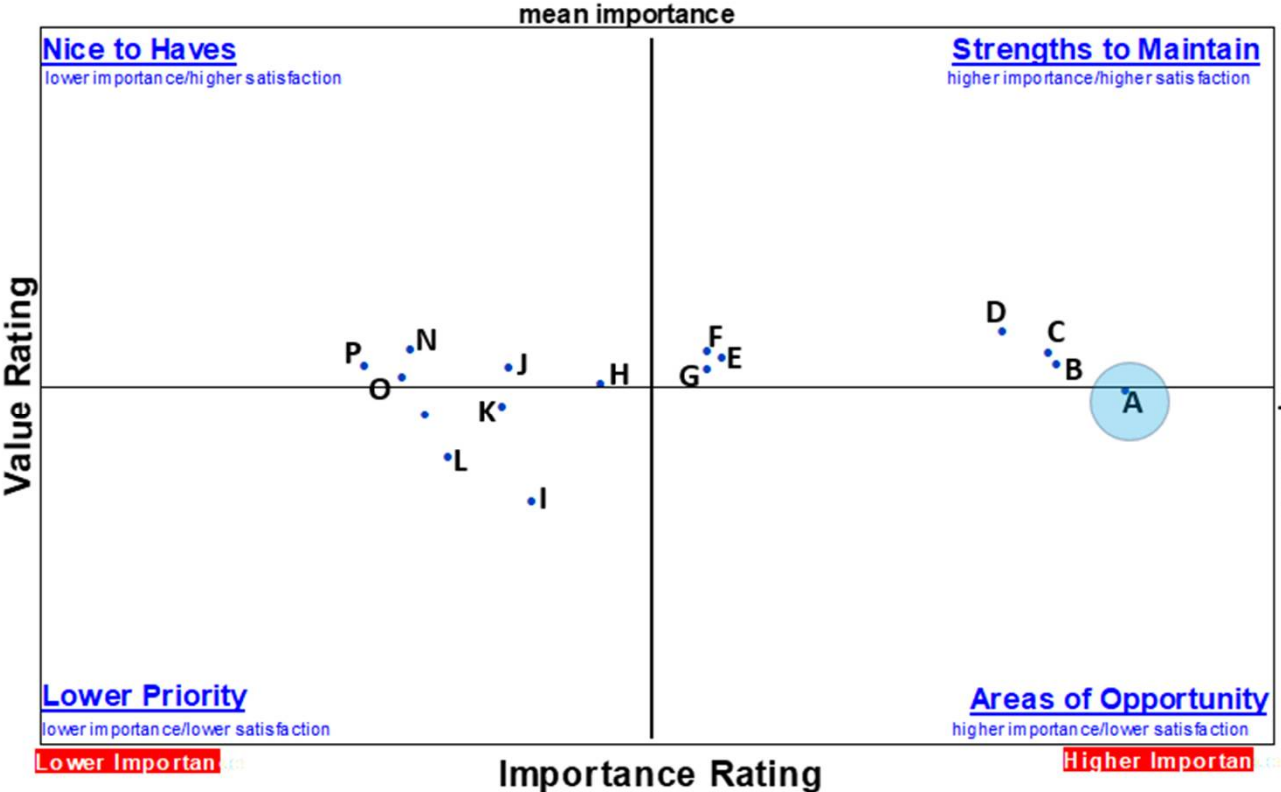


- A - Vehicles arrive within scheduled pickup window
- B - Fare price
- C - Ease of scheduling a trip
- D - Ability to get to places I need to go
- E - Feeling safely secured in vehicle
- F - Travel time
- G - Ability to schedule trips for times I need to travel
- H - Drivers operate vehicles safely
- I - Personal security (safe from crime) on vehicle
- J - Drivers being courteous
- K - Proper mechanical safety of vehicle
- L - Drivers being helpful
- M - Vehicle comfort
- N - Timely resolutions of my questions, concerns, or complaints
- O - Vehicle cleanliness
- P - Availability of scheduling staff



Source: ETC Institute (2025)

Key Driver Analysis: Access-on-Demand



- § A - Fare price
- § B - Ease of scheduling a trip
- § C - Vehicles arrive within scheduled pickup window
- § D - Ability to get to places I need to go
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Source: ETC Institute (2025)



Summary/Conclusion

Summary of Key Takeaways

Overall satisfaction increased with RTD services has increased

- Ratings improved in 19 of 19 areas for Bus
- Ratings improved in 19 of 19 areas for Commuter Rail
- Ratings improved in 16 of 19 areas for Light Rail

RTD is setting the standard for service delivery

- Most areas rated above national average in most areas

Composite Net Promoter Score for all services increased by 24 points, from 13 to 37

Service frequency is the top opportunity for improvement for bus and rail customers based on the key driver analysis



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