



RTD Systemwide Fare Study and Equity Analysis

Current Conditions Fare Survey Results - Summary

October 3, 2022

Current Conditions Fare Survey Results

Introduction

RTD conducted outreach to gain feedback on its current fares. This survey asked customers and non-customers for their opinions and preferences regarding current RTD fares and how RTD can improve them. These opinions provided very important feedback and will help inform potential fare alternatives considered as part of the Systemwide Fare Study and Equity Analysis.

As part of the outreach process for the fare study, RTD conducted an online survey April – May 2022. Customers could access the survey from the RTD Systemwide Fare Study and Equity Analysis website: <https://www.rtd-denver.com/farestudy>. The survey was offered in English, Spanish, Vietnamese and Chinese languages. In addition to the online survey, Community Partners also conducted the survey in-person and entered survey responses into the survey platform.

The survey received 2,425 responses from RTD customers and non-customers throughout the counties of the RTD service area. The survey was open to everyone to participate, there was no sampling involved and no weighting of the data.

Customers were asked the frequency of their previous and current usage of RTD services, the types of fares, types of discounts and types of passes they use. Current customers were asked to provide their opinion on what they like and do not like about RTD fares. Previous customers were asked their opinion on RTD fares as well as what would convince them to return to riding RTD. Non-customers were asked to provide some reasons for why they have chosen not to ride RTD services and about chances that would convince them to ride RTD.

Equity Populations

Given the focus of the Systemwide Fare Study and Equity Analysis on promoting equity, for several of the survey questions cross tabulations were done to understand how equity populations, in particular low-income and minority survey respondents, may have responded differently from overall survey respondents. These equity populations as defined align with RTD's Title VI Disparate Impact (minority) and Disproportionate Burden (low-income) Policies.

Low-Income Status: Survey respondents were asked to provide their household income level and number of individuals in their household. Combining the household size with the income level determines a household's low-income status. In this survey, respondents are considered low income if their household income is at or below 150% of the Department of Health and Human Services Poverty Guidelines.¹ The number of survey respondents that were categorized as low income was 149, which is 9% of survey respondents.

Minority Status: Additionally, survey respondents were asked to self-identify their racial / ethnic background. Of those who responded to the question 24% identified as a minority ethnicity / racial background. Minority being defined as anyone who indicated a race / ethnicity other than "Caucasian/White – not of Hispanic origin."

¹ "U.S. Federal Poverty Guidelines Used to Determine Financial Eligibility," HHS Poverty Guidelines for 2022
<https://aspe.hhs.gov/topics/poverty-economic-mobility/poverty-guidelines>

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Definitions

Airport – Customers who most frequently pay the Airport fare when using RTD services

Bus – Customers who use RTD bus services (i.e., local bus, regional bus, Skyride, Flatiron Flyer, 16th Street Mall Shuttle, or FlexRide). Note: respondents were able to select multiple service types

Equity Populations - Low-income or minority customers as defined based on RTD's Title VI Disparate Impact (minority) and Disproportionate Burden (low-income) Policies and as defined below

Fare Level – Different fare levels paid by customers based on the distance-traveled or destination – Local, Regional, or Airport. This was also referred to as 'Service Level'

Local – Customers who most frequently pay the Local fare when using RTD services

Low-income – Respondents whose household income is at or below 150% of the Department of Health and Human Services Poverty Guidelines for their household size

Mode – Different service types – Bus or Rail. Note: respondents were able to select multiple service types

Minority – Respondents who indicated their race / ethnicity as African-American/Black, Asian/Asian American, Hispanic/Latino, Native Hawaiian or Pacific Islander, Native American/American Indian, Bi-racial/Multi-racial or Other

Rail – Customers who use, or used, RTD rail services (i.e., Light Rail [C-Line, D-Line, E-Line, F-line, H-Line, L-Line, R-Line and W-Line] or Commuter Rail [i.e., A-Line, B-Line, G-Line and N-Line]). Note: respondents were able to select multiple service types

Regional – Customers who most frequently pay the Regional fare when using RTD services

Spanish Language – survey respondents that filled out survey in Spanish, N=85

Definitions of the Three Study Goals

Equity – Support transit reliant/financially burdened customers; Provide equitable and fair access to fares, products and discounts, regardless of race, color, national origin, income status and for other marginalized communities

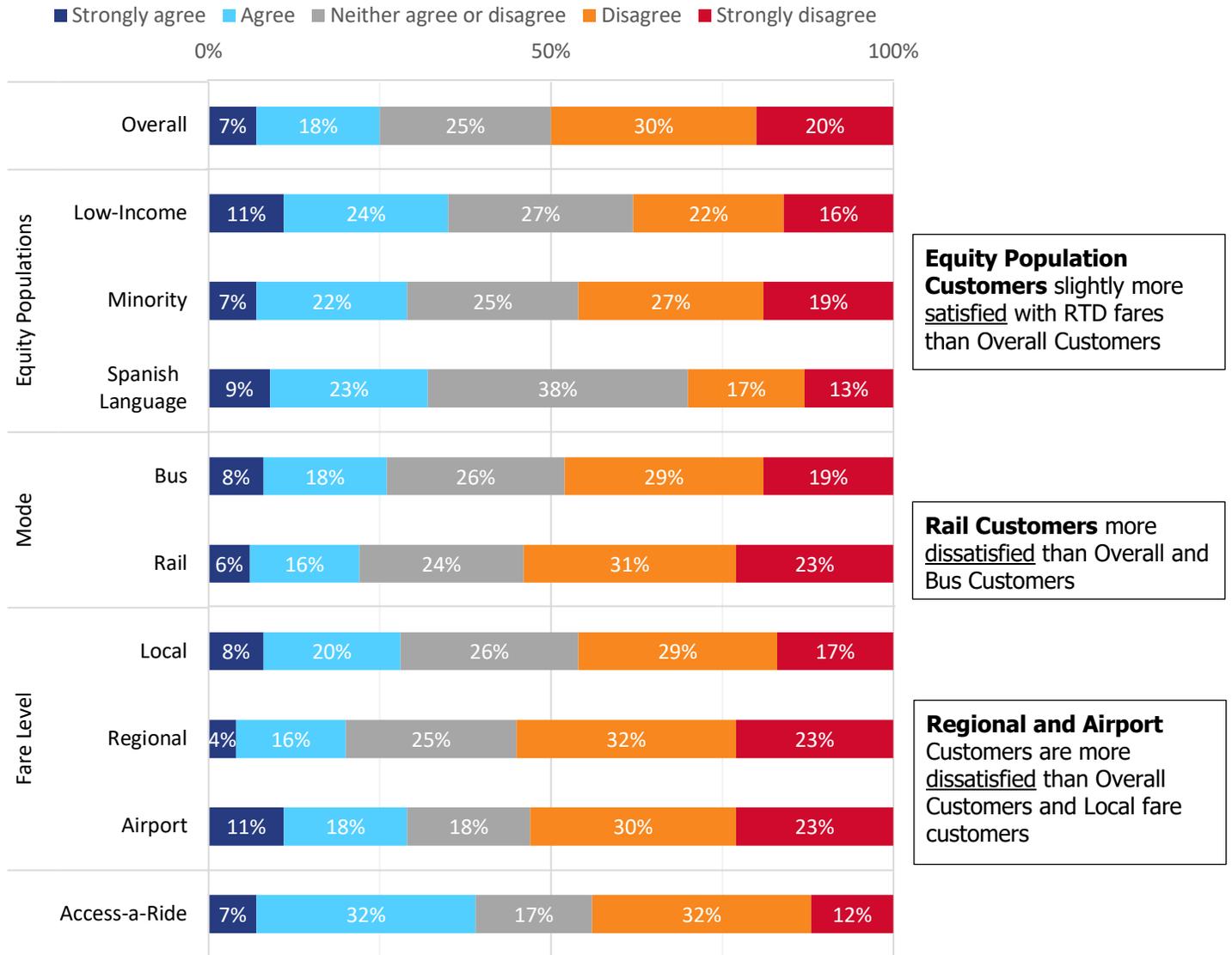
Affordability – Align fares with the value of the service received

Simplicity – Make fares easy to understand, with standardized discounts and streamlined fare payment options

Current Conditions Fare Survey Results

Views of RTD Fares Summary

Q14: How satisfied are you with RTD current fares?

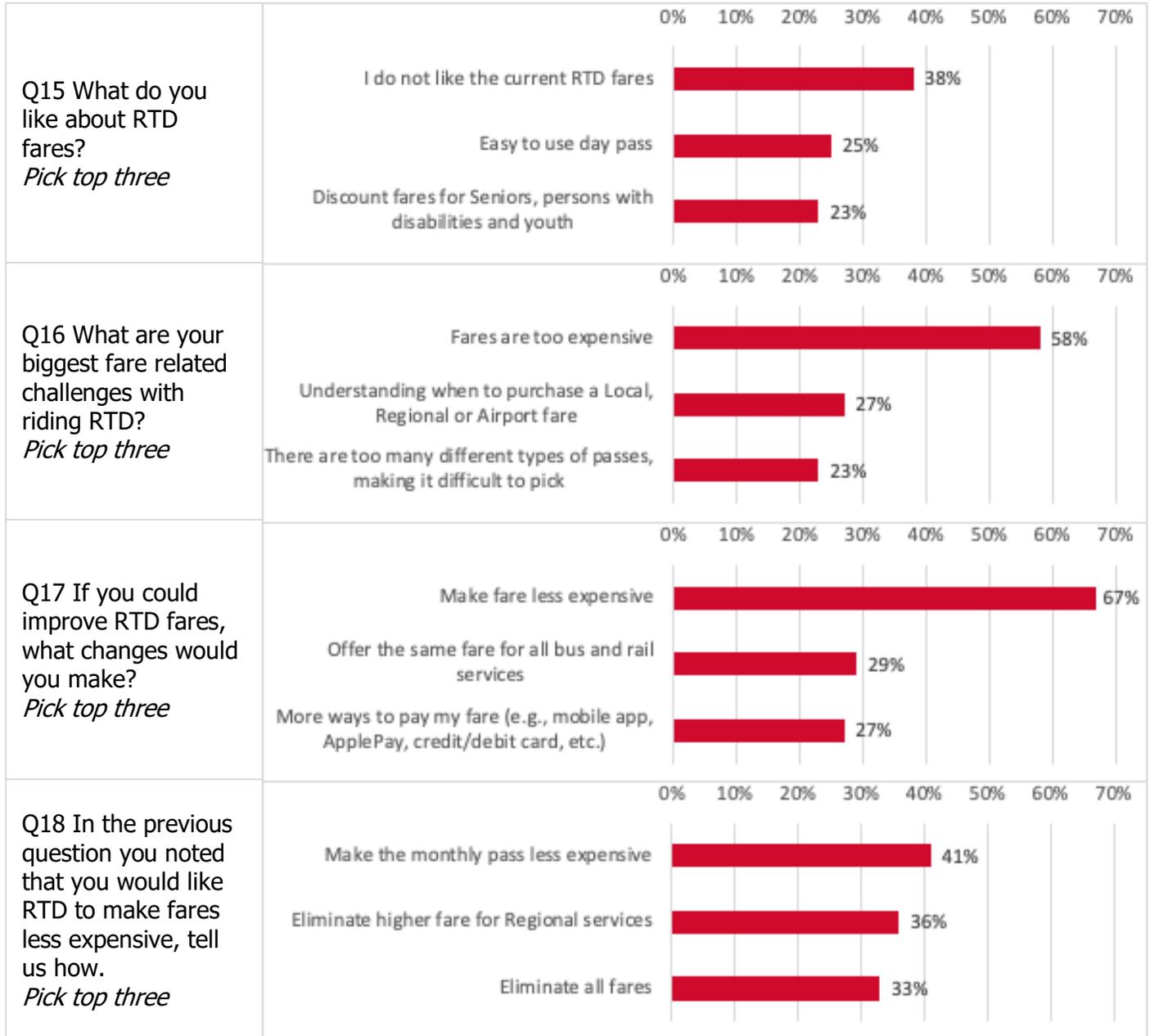


Satisfaction with RTD Fares Highlights

- Overall, approximately a quarter of customers are satisfied with RTD's current fares, a quarter are neither satisfied or dissatisfied, and remaining half are dissatisfied.
- Survey respondents were dissatisfied with RTD fares across equity populations, modes and fare levels. However, equity populations were slightly more satisfied with RTD fares than other groups.
- Rail customers and customers paying the Regional fare were the most dissatisfied with RTD fares.

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The survey also asked customers questions about what they like about RTD fares, what are their biggest challenges with RTD fares and how they would improve RTD fares. Survey respondent were asked to pick their top three choices. The following outlines the views of overall customers that responded to the survey regarding their views of RTD fares with their top three choices for each question.



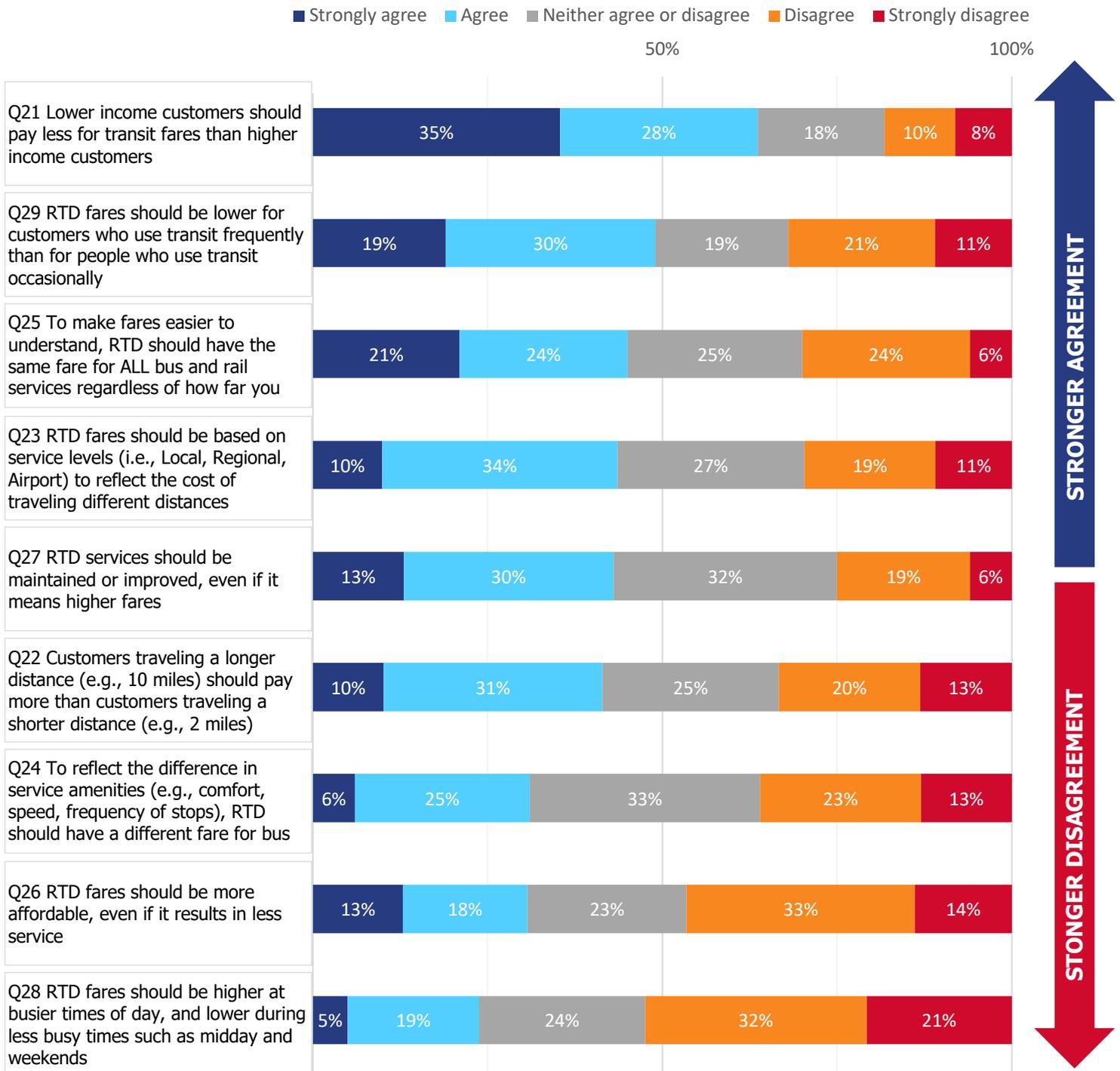
View of RTD Fares Highlights

- When asked about RTD fares, customers' top response was that they "do not like current RTD fares."
- Customers do like RTD's easy to use Day Pass and discount fares.
- Customers stated fares are too expensive and that they would make fares less expensive. Respondents second choice for improving RTD fares would be to offer the same fare for ALL bus and rail services.
- When asked how they would make fares less expensive, customers stated that they would make the monthly pass less expensive and eliminate the higher fare for Regional services.

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Survey Preference Questions Summary

The following outlines the views of survey respondents that responded to the survey regarding their fare structure preferences. Questions were designed around the three fare structure goals of equity, simplicity and affordability for the study. Questions at the top of the chart have higher percentage survey respondents that agreed or strongly agreed with the question. Questions at the bottom of the chart represent a higher percentage of survey respondents that disagreed or strongly disagreed with the question.



Current Conditions Fare Survey Results

Findings

For current and previous customers, approximately a quarter of customers are satisfied with RTD's current fares, a quarter are neither satisfied or dissatisfied, and remaining half are dissatisfied with RTD fares. Survey respondents were dissatisfied with RTD fares across all equity populations, modes and fare levels. However, equity populations were slightly more satisfied with RTD fares than other groups.

When asked what they think about RTD fares, customers' top choice was that they "do not like current RTD fares." For aspects of RTD fares that customers do like, RTD's easy to use Day Pass and discount fares for seniors, persons with disabilities and youth ranked as the second and third choices respectively. There was some variability among customer groups.

The biggest fare related challenges and response on how to improve RTD fares, the highest percent of customers stated fares are too expensive and that they would choose to make fares less expensive. When asked how they would make fares less expensive, customers stated that their top choice would be to make the monthly pass less expensive followed by eliminating the higher fare for Regional services.

Understanding the fare structure and how to pay the fare also poses challenges for customers. When asked about fare related challenges, the top three choices overall for customers included identifying when to purchase a Local, Regional or Airport fare, determining which pass product to choose and understanding how and where to pay fares. Top choices to improve RTD fares related to the fare structure included offering the same fare for ALL bus and rail services and providing the same discounts for seniors, individuals with disabilities, youth and low-income adults.

Customers and non-customers were then asked their preferences on how RTD should consider achieving the goals of the study.

Survey respondents agreed that:

- *Financially burdened customers should pay less for transit fares than higher income customers.*
- *RTD fares should be lower for customers who use transit frequently than for customers who use transit occasionally.*

For many respondents, service was more important than affordable fares:

- Largest share of respondents agreed with: *RTD services should be maintained or improved, even if it means higher fares.*
- Largest share of respondents disagreed with: *RTD fares should be more affordable, even if it results in less service.*

Results for fare structure preference questions were mixed:

- Largest share of respondents agreed with: *Customers traveling a longer distance (e.g., 10 miles) should pay more than customers traveling a shorter distance (e.g., 2 miles).*
- In both cases, the largest share of respondents agreed with: *RTD fares should be based on service type levels (i.e., Local, Regional, Airport) to reflect the cost of traveling different distances and simultaneously agreed with the question: *To make fares easier to understand, RTD should have the same fare for ALL bus and rail services regardless of how far you travel.* These two concepts are mutually exclusive.*
- *A large share of respondents disagreed that: RTD fares should be higher at busier times of day, and lower during less busy times such as midday and weekend.*
- Respondent views were mixed with a large share neither agreeing nor disagreeing with: *To reflect the difference in service amenities (e.g., comfort, speed, frequency of stops), RTD should have a different fare for bus than for rail.*