

Northern Indiana Commuter Transportation District

2018 South Shore Line Onboard Passenger Survey



Prepared for:



Completed by:



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EXECUTIVE SUMMARY

In 2018, the Northern Indiana Commuter Transportation District (NICTD) conducted a Rider Survey of its South Shore Line rail passengers. The 2018 study is a periodic 5-year update designed to provide NICTD with information about its customers, including travel patterns and trip purposes, demographics, and the riders' perceptions about the quality of services and facilities. Gathering data about where passengers start and end their trips is another important aspect of understanding and responding to the market's requirements.

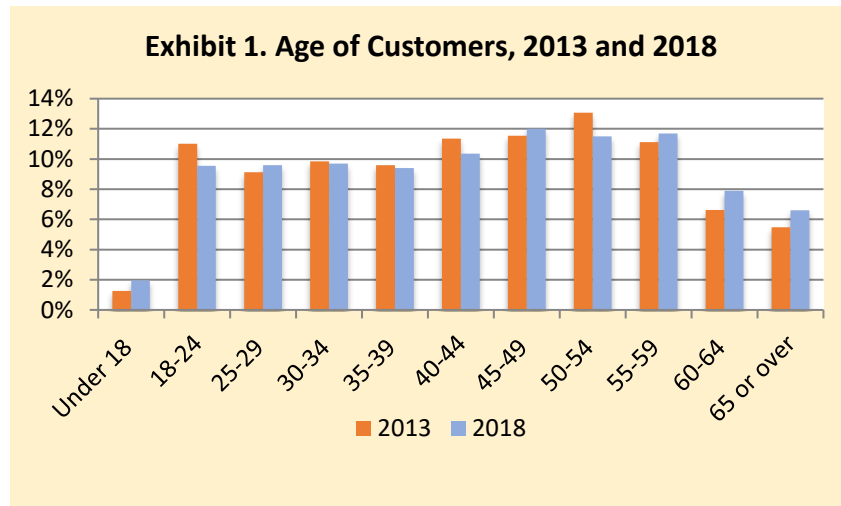
This information was obtained by intercept surveys conducted on the trains in Spring 2018. The surveys, a census of passengers rather than a sample, were distributed to passengers on all weekday trains arriving at or departing from Millennium Station Chicago before 1:00 PM, and on all weekend trains arriving or departing before 11:15 AM. The response was excellent. The surveyed trains had an estimated total of 5,026 boarding passengers, with 4,243 survey forms distributed and 3,217 completed, for a cooperation rate of 64%, compared to 57% in 2013. The response rate, if calculated by the method applied in 2013 (usable returns as a proportion of surveys distributed) was 76%, compared to 88% in 2013. If calculated using an alternative, more conservative approach (usable returns as a proportion of passengers encountered) the response rate was 61%.

This report presents consolidated results of the study that was conducted by The Blackstone Group in association with Vlecedes-Schroeder Associates, Inc and IPSOS.

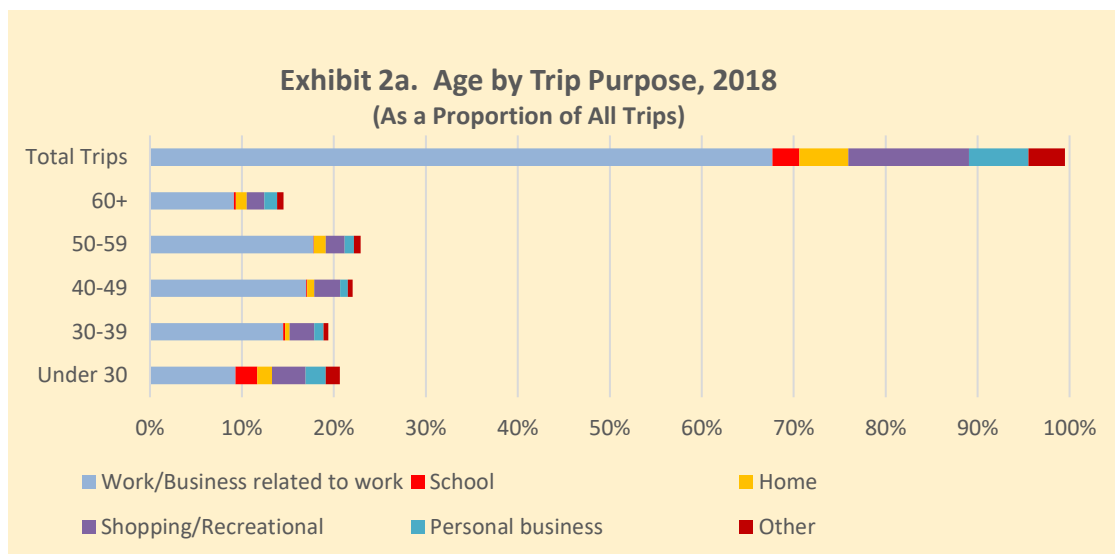
The South Shore Line Customers

The South Shore Line's customers are a diverse group, including not only commuters, but also weekend travelers and those riding for school, recreational, shopping and leisure activities.

- The South Shore Line's market catchment area is much larger than the immediate service area. While most riders, 76%, come from the South Shore Line's NW Indiana service area, another 5% come from other Indiana counties, and 9% come from Michigan.
- People of all ages ride the line, and they are distributed across all age groups. In 2018, the average rider is a little older than in 2013, 43.4, compared to 42.8, a change that may reflect the trend of our aging society. There are small increases in riders at either end of the age spectrum, both those who are under 18 and those who are 60 or older. In other age groups, changes are minimal, ranging from a fraction of a percent to 2%.

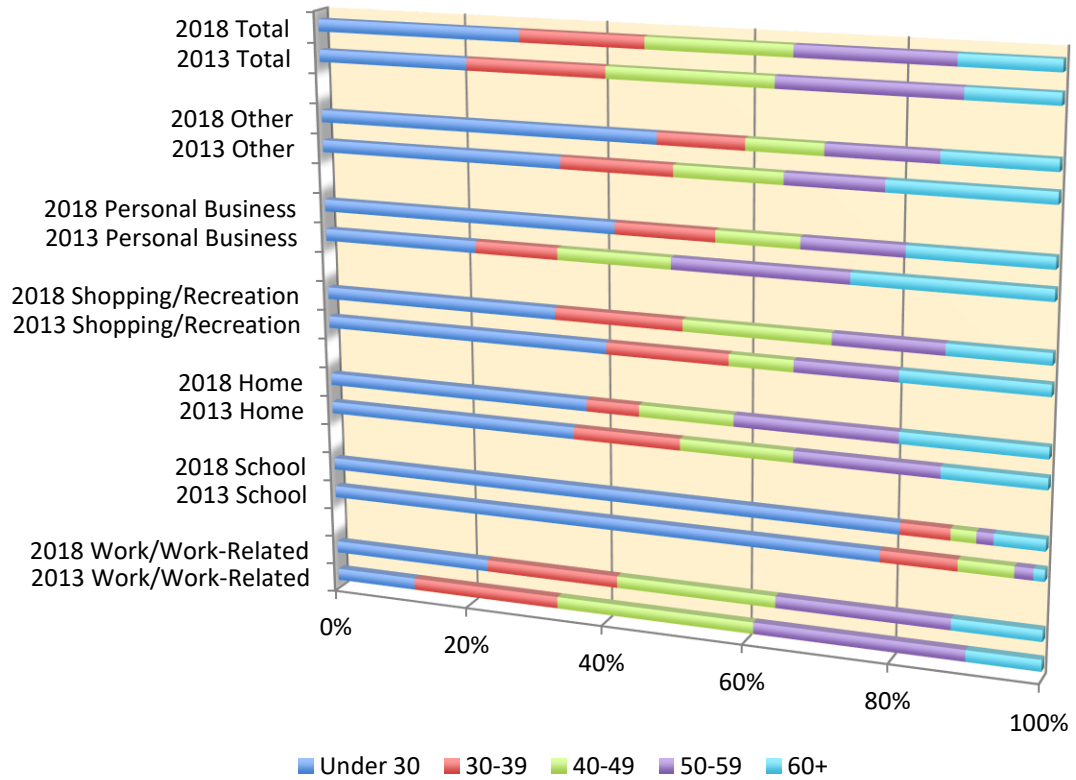


- About 13% of the responding riders are Hispanic, compared to 14% previously,¹ only a slight change. NICTD is always interested in receiving information about a sizable market group, and toward that end, the first question in the survey pretest asked whether respondents wished to receive the survey in the Spanish language. As fewer than 3% answered “Si,” and those who did went on to complete the English-language questionnaire, the questionnaire was not printed in Spanish for the actual survey. The same question appeared in the final questionnaire, with 77 respondents, or about 2% of all respondents, answering in the affirmative.



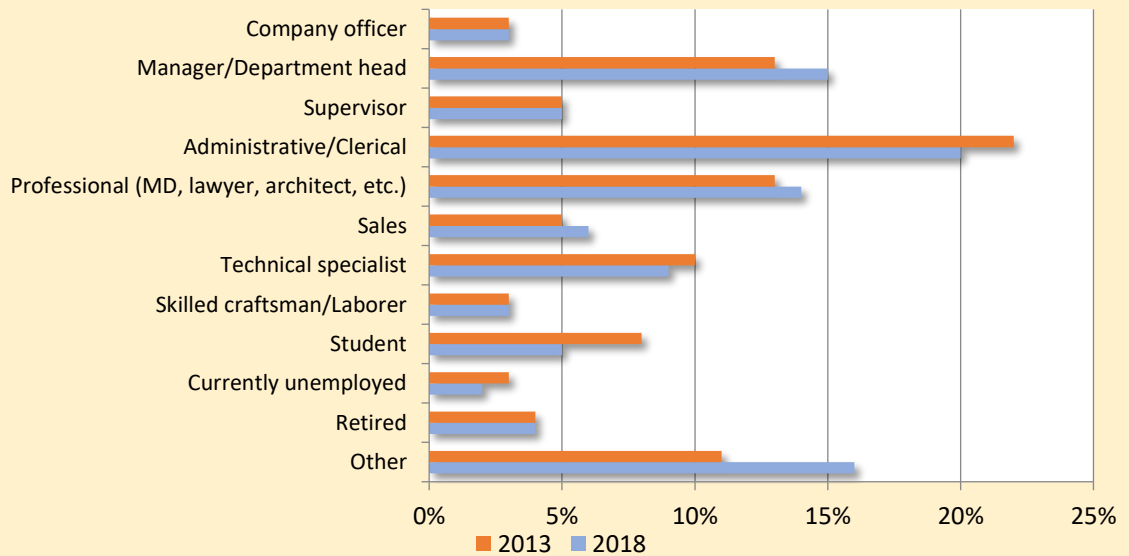
¹ Actually, both the 2013 survey findings and the *Title VI Compliance Report, May 2014, Part A: Service Area Demographic Characteristics* reported 14% Hispanic or Latino population in the South Shore Line service area. There has been a change in the U.S. Census Bureau’s handling of the questions of race and ethnicity since the 2010 Census. Previously, Hispanic or Latino included those of any race. More recently, the Census questions were redesigned to separate Hispanic, Latino or Spanish origin from race. The 2014 report is based on the newer approach.

**Exhibit 2b. Trip Purposes by Age Group
(Age Group's Share of Each Trip Purpose)**

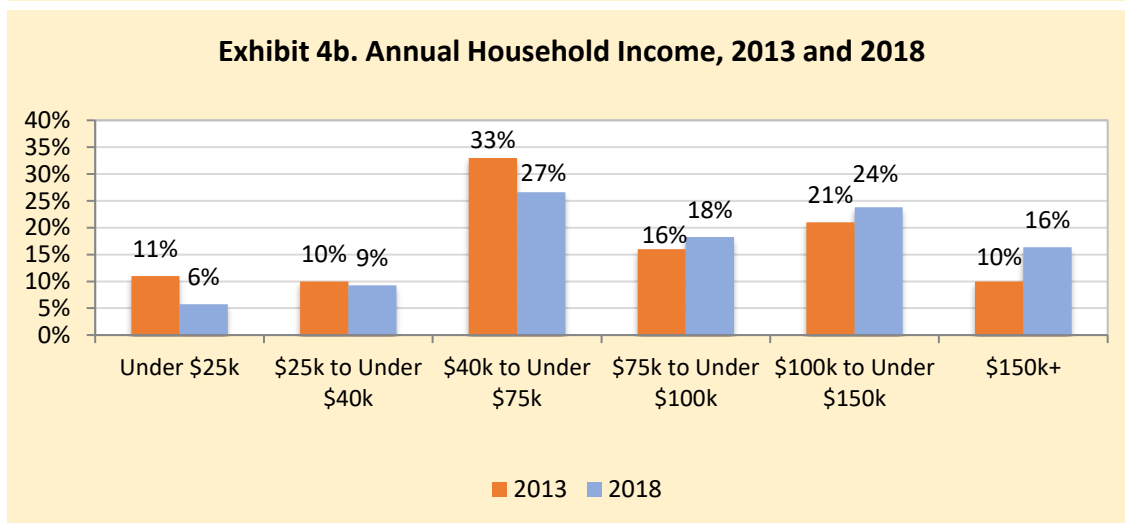
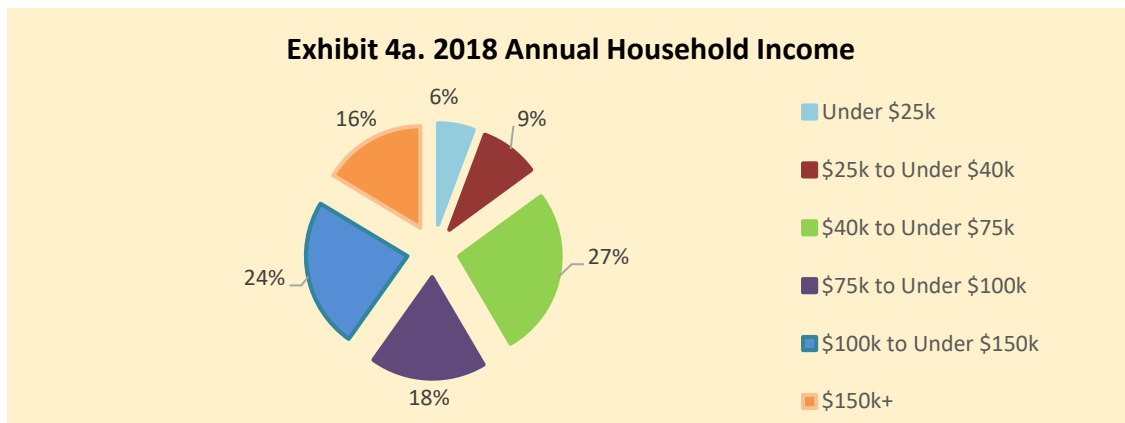


- Of those surveyed, the greatest number, 86%, were traveling during the AM Peak period.

Exhibit 3. Primary Job or Position



- As in 2013, almost 70% of the trips were work-related. On weekends, almost 60% of the customers are traveling for social, recreational or shopping purposes, or on personal business.
- Trip purposes differ by age group. More school trips are taken by those under 30 and proportionally more of their trips are for shopping/recreation, home and other than for any other age group. Significant changes have occurred since 2013, though. Of all trips taken by the 30 to 59-year-old group, the proportion for work has dropped from 79% to 72%. Again, perhaps as a reflection of societal trends with older people continuing to work, 13% of those over 60 travel for work, compared to 10% in 2013.
- As in 2013, the majority of riders, 57%, are executives, managers, administrative and professional people.
- Over 60% of the surveys were completed by women.
- Riders' average annual household income is \$88,400, up from \$82,400 in 2013. While more riders, 27%, continue to be in the \$40,000 to \$74,999 category than in any other group, 58% are in categories of \$75,000 or more. The income changes are substantial. As illustrated in Table 4b below, the proportion of 2018 riders in the under \$75,000 income groups has diminished, while it has grown in categories of \$75,000 or more.



Using the South Shore Line System

There are numerous changes in the way customers use the South Shore Line.

- Some changes in the way customers buy their tickets result from changes in the menu of purchase options. Most tickets, 38%, continue to be purchased from a vending machine at the station, a slight increase from 2013, but 19% are purchased using a mobile app, an option that was not available in 2013. While 29% of the riders formerly bought their tickets from an agent, now only 16% do. Also, fewer tickets are now purchased from a conductor on the train, 8% compared to 12% in 2013. Unchanged is the proportion of riders who secure tickets through tax-free commuter benefit programs, 15%. Tickets-by-mail are no longer available.
- Forty-five percent (45%) of the riders buy monthly tickets, compared to 47% in 2013. This is offset by a 2% increase in one-way ticket purchases (30% compared to 28% in 2013), the second most prevalent type of ticket purchase.
- Almost half of the South Shore Line's railroad's customers, 49%, have been patrons for more than 3 years, compared to 69% in 2013. In this survey 25% of the respondents indicated that they are not regular riders, compared to only 1% in 2013. This large difference may have been caused, at least in part, by the fact that the first week of the survey period coincided with school Spring vacation, and during that week, the Family Fare-Kids Ride Free (up to 3 children with an accompanying adult) was offered on all trains, producing higher than expected passenger counts on some trains.
- The majority of customers ride the system often, with 60% of them having made at least 20 trips in the four-week period preceding the survey. Thirty-six percent (36%) made at least 40 trips. In 2013, however, more were traveling frequently: 64% made at least 20 trips and 40% made at least 40 trips.
- Parking continues to be very important. More customers get to the train station by car, with the proportion increasing somewhat, to 90% from 87% in 2013. Of these, 64% drive alone and park (a 5% increase); the others either carpool (12%), or are dropped off (12%), a 4% decrease, slightly offset by the 2% who use rideshare services like Uber, Lyft, Via or other ride share service.
- When leaving the South Shore Line train, though, 70% of the customers walk to their final destination; another 9% transfer to a CTA train or bus, and 1% take Metra. The 2% drop in transfers to CTA and a 1% drop in transfers to private shuttle or taxi are offset by a 3% use of ride-share services, an option that was not available in 2013. As noted in the 2013 survey report, the difference between access and egress patterns undoubtedly relates to the fact that close to 80% of the trips end in downtown Chicago where street patterns and facilities encourage walking and transit use. Another consideration is that 58% of the riders travel eight blocks or less when they leave the station.

Customer Satisfaction

Overall, the South Shore Line’s customers rank the service favorably with 82% indicating that they would recommend using the service to others (compared to 79% in 2013). By another measure, the overall rating of the South Shore Line has also improved, with a mean score of 4 (3.95 in 2013) on an ascending scale of 1 to 5.

In 2018, the number of satisfaction attributes that were enumerated in the survey increased to 23 from 19.

- With the exception of the quality of WiFi, which scored a low 2.83, the range between mean high and mean low scores is rather narrow, from a high of 4.43 to a low of 3.41.
- As in 2013, personnel get high marks for courtesy. Although customers are a little more satisfied with vehicle security in the parking areas than they were in 2013, it continues to be a concern. Other persistent issues are: communications during service delays and service frequency which are sources of greater dissatisfaction, particularly among those who ride often.
- Satisfaction with parking attributes – availability, security and cost – is examined more extensively in the report, with parking issues localized to the station the passenger is using. Generally though, satisfaction has improved in all parking categories since 2013 with about 80% of the riders satisfied with both availability and cost. There is an improvement even with respect to vehicle security, with 63% satisfied and 16% dissatisfied, compared to 57% satisfied and 20% dissatisfied in 2013. However, vehicle security remains among the lowest rated attributes.

Exhibit 5. Customer Satisfaction

Highest and Lowest Attributes by Mean Score*

Highest Rated Attributes	Mean Score
Courtesy of onboard personnel	4.43
Cost of parking	4.41
Courtesy of station personnel	4.33
Personal safety on the train	4.26
Customer Service**	4.15
Lowest Rated Attributes	
Vehicle security at the parking area	3.71
Onboard communication of delays	3.67
Frequency of service	3.49
Station communication of service delays	3.41
Quality of WiFi**	2.83

*On a scale of 1 to 5, with 1 being completely dissatisfied and 5 being completely satisfied

**Attribute not included in 2013 survey

- Riders were asked to identify, in rank order, the three attributes that are most important to them. It is quite clear that getting to one’s destination on time is the most important, closely followed by value for the money. Service frequency is also key, achieving a third-place ranking here, and appearing in numerous written customer comments.

Exhibit 6. Most Important Attributes

Attribute	% Ranking Most Important	% Ranking Second Most Important	% Ranking Third Most Important
Getting to destination on time	17%	12%	11%
Value for the money	14%	11%	11%
Frequency of service	8%	8%	9%

- Of the seven factors that might influence a decision to ride the South Shore Line, the cost of driving versus the cost of taking the train and the ability to relax with less stress are consistently the most important, and the latter is a little more important to weekend passengers. Other strong influences on the decision to take the train are travel time and downtown parking rates. The relative importance of the other factors is unchanged since 2013. However, the cost of driving is important to proportionally fewer people, perhaps due to the cost of fuel which has been somewhat lower than it was in 2013.

Exhibit 7. Factors Affecting Ridership: Top Scores

Factor	2018 Top Box Rating	2013 Top Box Rating
Cost of driving vs. cost of taking the train	79%	83%
Ability to relax with less stress	79%	76%
Travel time	70%	66%
Downtown parking rates	69%	70%
Ability to read/work while commuting	66%	NA
Ability to better predict arrival time	64%	62%
Concern for the environment	42%	44%

Additional Observations

- Since the 2013 survey, the South Shore Line added a “Quiet Car” to trains, and 51% of responding customers indicated that they prefer to ride in a “Quiet Car”. The proportion was lower, 35%, among those traveling on a family fare.

- After 2013, when 62% of respondents indicated they were in favor, the South Shore Line decided to accommodate bikes on some trains. Now, 62% indicate that bikes should be allowed on more trains, although only 2% responded that they had traveled with their bikes in the past year. Of that group, only 33 people answered the question about frequency, which varied from 1 time to 10 times.
- Now, 95% have smart phones, compared to 77% in 2013, and 24% have laptops with wireless connections, compared to 18% five years ago. The proportion of those with tablets, 22%, remains unchanged. Since 2013, the South Shore Line has introduced WiFi on the trains, but the quality of the WiFi service is, as noted, the lowest rated of the attributes. This may be an issue that should be addressed since connectivity has become increasingly important in today's world.

Recommendations

- As noted, the average household income of South Shore Line riders has increased substantially since 2013. It is also true that the Black/African American population has dropped slightly (3%) as a proportion of riders. NICTD may wish to examine factors contributing to the changing profile of the South Shore Line rider. Examples of such factors include: more people working closer to home (or fewer working in Chicago); and more people relocating from Illinois to Indiana for various reasons.
- Tickets purchased under the Family Plan Kids-Ride-Free are used by 5% of weekend respondents. This program has been reconfigured since 2013; it now permits 3 children under age 14 to ride free with an accompanying adult on weekends and during the off-peak. Formerly, 2 children were accommodated under this program. Capacity permitting on weekend trains, family fares should be marketed aggressively to increase off-peak ridership.
- NICTD should consider doing an in-depth survey of the summer weekend customers, especially to gain an understanding of those traveling eastward to the Indiana Dunes National Lakeshore, Indiana Dunes State Park and to summer homes in Indiana and Southwest Michigan. Armed with more information, the agency could develop focused approaches to enhance its share of travel in that leisure or "choice" market.

INTRODUCTION

Background

The Northern Indiana Commuter Transportation District (NICTD) operates passenger service on the South Shore Railroad, which the District owns. The South Shore Line, a service with terminals in downtown Chicago and at South Bend Airport, has nineteen (19) stations that serve a variety of markets, ranging from dense urban areas to educational centers, as well as both the Indiana Dunes National Lakeshore and Indiana Dunes State Park, two parks of national and statewide significance.

Annually, according to the 2016 National Transit Database, South Shore Line passengers take over 3.5 million trips, with about 11,700 of these trips occurring on an average weekday. In 2016, there were over 5,100 passenger trips on a typical Saturday, and more than 4,100 Sunday trips, representing 44% (Saturday) and 35% (Sunday) of the weekday passenger volume. Comparing these figures to Metra's 2016 report shows substantial differences in the markets served by the two agencies. Metra's Saturday and Sunday passenger volumes are 22% and 14%, respectively, of its weekday volume. The difference suggests the importance to NICTD of the leisure and recreational, or discretionary, travel market.

Because NICTD is responsible for establishing policy, planning service, developing facilities and making capital investments, it is important that the agency understand its market. This survey was designed to provide insights into that market and results that will inform future policy initiatives, operational decisions, and market expansion and revenue enhancement activities.

Study Overview

The study's main objective was to provide NICTD with up-to-date demographic profiles about its customers, and to allow them to grade the South Shore Line Railroad on various service and facilities attributes. Other specific objectives were to gather and analyze data pertaining to:

- Trip purpose and characteristics for both frequent riders destined for the Chicago business district, and for other riders who represent niche markets such as weekend riders
- Access to and egress from the stations, including parking and transfers to or from other connecting systems
- Travel behavior, including frequency of travel, ticket type and time of day, and
- Point of origin to understand how far people travel to use the South Shore Line service

This report addresses these important issues, as well as other findings that result from the data analysis. As a baseline was established in the *2013 South Shore Line Passenger Survey*, it is possible to identify changes and trends, if any. The following chapters are organized to focus on each issue. Detailed survey methodology, the survey instrument and other detailed survey information are included in the appendices.

Study Methodology

As noted, a complete discussion of study methodology, is included as an appendix to this report. The major elements are as follows:

Questionnaire: The questionnaire, updated to reflect changes in the last five years and to obtain information on current issues, is similar to that used in the *2013 South Shore Line Passenger Survey*.

- **Pretest:** A pretest of the questionnaire and data collection methodology occurred on March 7, 2018. Following the pretest, the study team reworded three questions in the survey instrument for clarification purposes. No changes were needed in collection methodology.
- **Data Collection:** Data collection started on April 3, and most of it was completed by April 21, 2018. A make-up run on one car of one train was completed on April 19. One of the weekend trains was not surveyed until April 28. With the exception of Friday, April 6, the weekday survey focused on Tuesday, Wednesday or Thursday trains scheduled to arrive at or depart from Millennium Station in downtown Chicago before 1:00 PM. Weekend surveys occurred on Saturday trains scheduled to arrive at or depart from Millennium Station before 11:15 AM. Excluding the pretest, no train was surveyed more than once. Questionnaires were distributed on all cars on all trains. No surveying occurred during holiday periods.

Of the 3,217 questionnaires that were completed 93% were returned on the trains, with 3% returned by mail, and just over 4% completed online. In 2013, when online completion was not an option, 97% were returned on the trains.

Distribution and Response Rates: The response was excellent. Of the total estimated 5,026 passengers boarding the trains that were surveyed, 4,243 survey forms were distributed and, as noted, 3,217 were completed for a cooperation rate of 64%, compared to 57% in 2013. At 47%, the weekend cooperation rate also exceeded the 2013 weekend rate, 39%, by a substantial margin.

The response rate can be calculated in different ways. In 2013 the response rate, representing the number of usable returns as a proportion of surveys distributed, was over 88%. In 2018, the response rate was calculated using a more conservative method, that of showing the number of usable returns as a proportion of passengers encountered. If the 2013 method is used for the 2018 survey, the response rate is about 76%, while the more conservative 2018 alternate yields a rate of 61%.

	Estimated Passengers	Passengers Encountered	Surveys Distributed	All Refusals	Distribution Rate	Usable Returns	2018 Response Rate Using 2013 Method	2018 Response Rate, Alt Method
Weekday	3,706	4,168	3,400	768	92%	2,600	76%	62%
Weekend	1,320	1,143	843	300	64%	617	73%	54%
Total	5,026	5,311	4,243	1,068	84%	3,217	76%	61%

Note: Numbers include the pre-test and adjustments for data cleaning

Data Analysis

Selected weighted tables were prepared to compare weighted and unweighted data. Although the survey method essentially incorporated a census of riders and produced high response rates, differences between the two datasets were greater than in the 2013 survey, so weighted data were used to analyze the results.

Data tabulations provide information on the following:

- Day and direction of travel
 - Ticket type
 - Trip purpose
 - Access and egress modes
 - Frequency of travel on the South Shore Line
 - Length of regular South Shore Line use
- Boarding station
 - Destination station
 - Education level and profession
 - Gender, age, income and ethnicity
 - Place of trip origin
 - Customer satisfaction

Another feature of the data compilation is geo-coding, or precisely locating, originating trip locations by latitude and longitude. Geo-coding provides further insight into travel patterns, and in the case of the South Shore Line, shows its extraordinary market reach.

Glossary

The Glossary of Terms defines terms that are used throughout the report.

Table 9. Glossary of Key Terms	
Term	Definition
AM Peak In	Weekday trains arriving in the Chicago CBD before 9:00 AM
AM Peak Out	Weekday trains leaving the Chicago CBD before 8:00 AM
Midday	Weekday trains arriving in the Chicago CBD between 9:00 AM and 12:45 PM or departing from the Chicago CBD between 8:45 AM and 12:45 PM
Reverse Commuters	Weekday customers who travel eastbound (out) in the AM Peak
Traditional Commuters	Weekday customers who travel westbound (in) in the AM Peak
Banners	Survey questions used to tabulate data
Mean	The average of numeric data
Box Score	Customer ranking of various attributes on a scale of one to five. Rankings are grouped in 3 categories: dissatisfied (low box, ratings of one to two); neutral (mid-box, rating of three); and satisfied (top box, ratings of four to five)

Abbreviations

The following abbreviations appear throughout the report.

Term	Definition
NICTD	Northern Indiana Commuter Transportation District
CBD	Central Business District

DEMOGRAPHICS

The average South Shore Line passenger is likely to be a 43 year old female with a college or post-graduate education. This person is in a managerial, professional or administrative position, and living in a household where the average annual income is \$88,400.

Age

Riders are quite evenly distributed across all age groups, except that fewer are age 60 or over.

Exhibit 11. Age by Trip Purpose

Age	South Shore System		Work/Work Related		School		Shopping / Recreation		Personal Business		Home		Other	
	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018	2013	2018
Under 30	21%	21%	12%	14%	79%	81%	35%	34%	22%	42%	35%	30%	34%	48%
30-39	20%	19%	21%	21%	10%	7%	15%	16%	11%	14%	15%	9%	16%	12%
40-49	23%	22%	28%	25%	7%	3%	15%	13%	16%	11%	15%	14%	15%	10%
50-59	24%	23%	29%	26%	2%	2%	20%	16%	24%	14%	20%	25%	13%	15%
60+	12%	15%	10%	13%	1%	7%	14%	22%	27%	19%	14%	22%	22%	15%

Note: Columns may not sum to 100% due to rounding

When examining age by trip purpose, riders who are 30 or under continue to dominate all trip purposes other than those that are Work or Work Related. Similarly, trips made by those who are 60 or older are primarily for Personal Business, and Home. Together, those in the 30 to 59 age group account for over 70% of Work and Work-Related trips.

This survey also provided a more refined breakdown of trips made for recreational purposes. Here, those under 18 dominate shopping trips, travel to the museums and personal business trips. More trips for medical appointments are made by riders who are 60 or over; otherwise medical and dental trips are negligible. And, most of the discretionary or leisure trips made by those 60 or over are for personal business or to the museums.

Primary Job

Twenty-three percent (23%) of the South Shore Line's customers are in executive, supervisory or managerial positions, and 14% are in the professions. Another 27% are in administrative, clerical or technical jobs. Not surprisingly, riders boarding at South Bend exceed the system average in the Student category (13% vs. 5%). The 2018 survey sought more detail in the 2013 "sales" category, breaking it down in Non-Retail Sales, Retail Sales and Food Service, but there was very little difference in the results, measured by proportion of all jobs. (Refer to Exhibit 3 in the Executive Summary.)

Exhibit 12. Primary Job by Station Boarding Group

	South Shore System	Millennium Station thru McCormick Place	63rd thru 57th	Hegewisch	E Chicago thru Hammond	Gary/Chicago Airport thru Miller	Portage thru Beverly Shores	11th St thru Carroll Ave	Hudson Lake thru S Bend
Company Officer	3%	3%	1%	6%	5%	4%	7%	3%	2%
Manager/ Department Head	15%	16%	14%	9%	14%	7%	10%	10%	8%
Supervisor	5%	5%	4%	6%	4%	11%	4%	1%	2%
Administrative/ Clerical	20%	22%	16%	16%	16%	11%	6%	1%	5%
Professional (MD, lawyer, architect, etc.)	14%	14%	13%	3%	8%	12%	11%	17%	6%
Non-Retail Sales	2%	2%	0%	3%	1%	0%	0%	4%	1%
Retail Sales	1%	1%	1%	6%	3%	2%	1%	10%	6%
Food Service	2%	2%	2%	0%	2%	2%	3%	3%	8%
Technical Specialist	7%	9%	7%	3%	5%	11%	8%	4%	3%
Skilled Craftsman/ Laborer	3%	2%	7%	6%	2%	7%	3%	7%	1%
Student	5%	4%	3%	9%	8%	4%	7%	1%	13%
Currently unemployed	2%	1%	0%	6%	0%	4%	4%	4%	6%
Retired	4%	3%	11%	3%	9%	2%	18%	22%	15%
Other	16%	16%	19%	22%	21%	25%	22%	13%	26%

Note: Columns may not sum to 100% due to rounding

Education

South Shore Line customers are well-educated, with over 60% having a college degree or post-graduate education. This has increased from 54% in 2013 and is offset by a decrease in the proportion of riders who have completed some college or less. Of those boarding at Portage/Ogden Dunes (one of the stations in the Portage to Beverly Shores station group), about 90% have either a college degree or post graduate education.

Exhibit 13. Education by Boarding Station Group, 2018

	South Shore System	Millennium Station thru McCormick Place	63rd thru 57th	Hegewisch	E Chicago thru Hammond	Gary/Chicago Airport thru Miller	Portage thru Beverly Shores	11th St thru Carroll Ave	Hudson Lake thru S Bend	
	2013	2018								
High School or Less	18%	16%	14%	22%	24%	12%	15%	14%	18%	26%
Some College	28%	24%	24%	30%	28%	27%	25%	19%	20%	22%
College Graduate	37%	42%	43%	25%	34%	46%	40%	42%	39%	33%
Post Graduate	17%	19%	19%	23%	13%	15%	20%	25%	23%	19%

Note: Columns may not sum to 100% due to rounding

Language Preferences

The 2018 survey explored the language that riders speak at home. With over 97% speaking English at home, 4.6% speaking Spanish, and 2% speaking other languages, it is clear that two languages are spoken in some households. The lowest incidence of English being spoken at home, 93%, occurs in the Hudson Lake-South Bend station group, while the highest incidence of Spanish being spoken at home, almost 11%, occurs at Hegewisch.

Further, about 99.5% of the respondents indicated that they speak English very well or well. Only 0.2% do not speak English at all.

Household Income

Almost 60% of the South Shore Line's customers live in households where the annual income is \$75,000 or greater, and 40% have annual household incomes of \$100,000 or more, representing a substantial increase in income since 2013 when fewer than 50% of households were in the \$75,000 or more category.

- Riders' average household income has also increased, from \$82,400 to \$88,400 in this five-year period.
- Fifteen percent (15%) are from households where the annual income is less than \$40,000, compared to 21% in 2013.
- Over 30% of passengers boarding at Hudson Lake to South Bend have annual household incomes of under \$40,000, and passengers boarding at the Portage to Beverly Shores station group have annual household incomes averaging more than \$115,000. Of this latter group, almost 14% are in households with an average annual income of at least \$200,000.

Exhibit 14. Household Income, 2018

	South Shore System		Millennium Station thru McCormick Place	63rd thru 57th Hegewisch	E Chicago thru Hammond	Gary/Chicago Airport thru Miller	Portage thru Beverly Shores	11th St thru Carroll Ave	Hudson Lake thru S Bend	
	2013	2018								
Under \$25k	11%	6%	5%	8%	7%	4%	8%	3%	6%	15%
\$25k to under \$40k	10%	9%	8%	13%	13%	9%	10%	5%	8%	15%
\$40k to under \$75k	33%	26%	26%	38%	27%	26%	31%	22%	28%	28%
\$75k to under \$100k	16%	18%	19%	19%	24%	18%	20%	17%	19%	12%
\$100k to under \$150k	21%	24%	25%	14%	20%	25%	21%	28%	25%	19%
\$150k+*	10%	-	-	-	-	-	-	-	-	-
\$150k to under \$200K	-	10%	10%	6%	8%	12%	6%	12%	7%	6%
\$200K+	-	7%	7%	4%	2%	7%	4%	14%	6%	4%

*Income reporting was more detailed in 2018

Note: Columns may not sum to 100% due to rounding

Gender

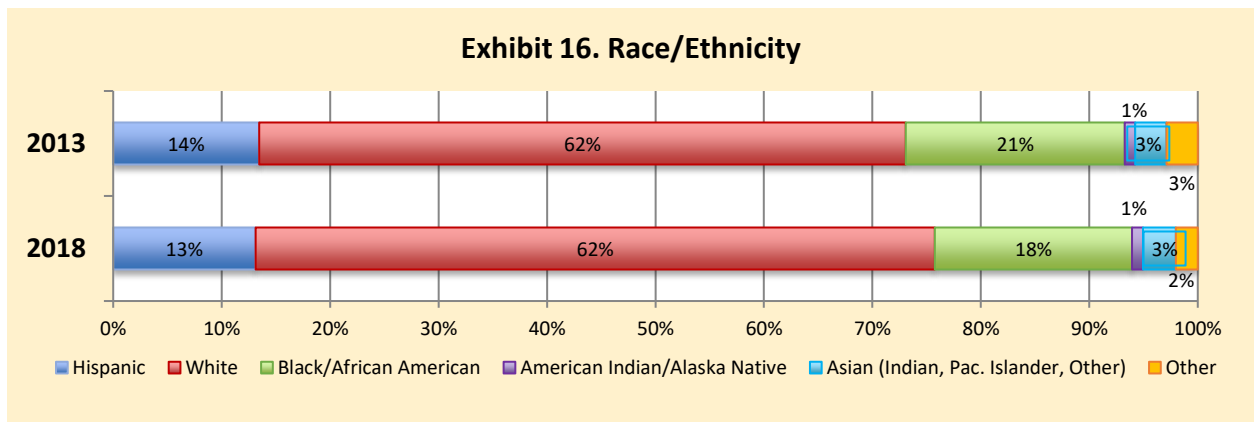
Sixty-one percent (61%) of the respondents are female, with the proportion varying only $\pm 2\%$ for any time period. The proportion of responding males increases slightly during midday and on weekends. Males are more apt to use 10-ride tickets than any other type while females use more monthly tickets.

Exhibit 15. Gender by Travel Time and Ticket Type

	South Shore System	By Period			By Ticket Type			
		Total	AM Peak	Midday	Weekend	Monthly	25-Ride	10-Ride
Female	61%	64%	59%	59%	64%	59%	56%	58%
Male	39%	36%	41%	41%	36%	41%	44%	42%

Race and Ethnicity

South Shore Line customers are ethnically diverse, although the majority identify themselves as White. Although the general distribution of racial and ethnic groups in the South Shore Line service area is proportionally similar to that of 2013, riders who are Black/African American now comprise 18% of the ridership, down from 21%.



Notes: 1. Percentages may sum to more than 100% since respondents could select more than one answer.
2. "Hispanic" includes respondents of any race.

TICKET USE AND PURCHASING

Types of Tickets

The following types of tickets are available to South Shore Line customers:

- Monthly
- 25-Ride
- 10-Ride
- One-way
- Family Fare
- Other

The majority of passengers, 75%, use monthly and one-way tickets, unchanged from 2013. Since 2013, though, 4% fewer passengers are using monthly tickets, and 4% more are using one-way tickets. The shift is more dramatic in the context of those traveling inbound during the AM rush; for this group, monthly ticket use has dropped to 53% from 68%, and one-way ticket use has increased from 9% to 22%.

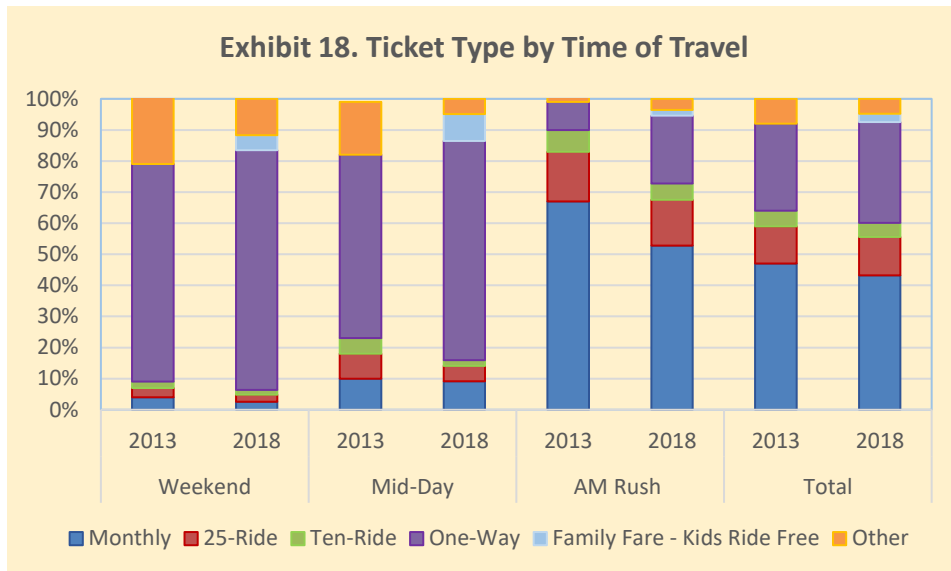
Twenty-Five-Ride tickets are the third most popular at 12% overall, and 15% during the AM rush, while only 4% use 10-Ride tickets despite the fact that there is a small savings associated with their use.

	Weekend		Midday		AM Rush		Total	
	2013	2018	2013	2018	2013	2018	2013	2018
Monthly	4%	3%	10%	9%	67%	53%	47%	43%
25-Ride	3%	2%	8%	5%	16%	15%	12%	12%
Ten-Ride	2%	1%	5%	2%	7%	5%	5%	4%
One-Way	70%	77%	59%	71%	9%	22%	28%	32%
Family Fare - Kids Ride Free	*	5%	*	9%	*	2%	*	3%
Other	22%	12%	17%	5%	2%	4%	8%	5%
<i>*Family fares were not available in 2013</i>								
<i>Note: Columns may not sum to 100% due to rounding</i>								

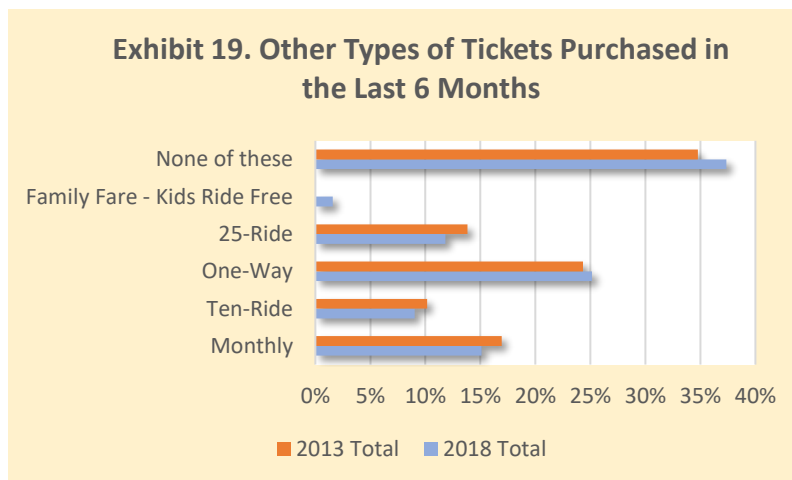
The Kids Ride Free program has been changed since the 2013 survey. Now, up to three children (rather than 2) who are under age 14 may ride free with an accompanying adult during the off-peak, or on the weekends and holidays. While only 3% of all tickets are purchased under this program, weekend (5%) and especially midday (9%) incidence is considerably higher. The higher midday incidence may have been affected by the school Spring vacation period that overlapped with the first week of the survey.

Over three-quarters (77%) of the weekend riders use one-way tickets, and over 70% of Midday riders also use one-way tickets. Uses of both 10-Ride and 25-Ride tickets are greater among those traveling inbound during the AM Rush period.

The exhibit below and the table above array the same data, but the exhibit emphasizes the changed use of ticket types since 2013, particularly the increased use of one-way tickets, and the reduced use of monthly tickets in almost every time period.



Sixty-three percent (63%) of the respondents used other type of tickets in the 6 months preceding the survey. Again, the data show that since 2013, fewer monthly and more one-way tickets were used.



Since the last survey, purchase patterns have shifted in several respects:

- 28% of South Shore Line passengers use an employer-based tax-free commuter benefit program or an employer-purchased fare to get their tickets, an increase of 2% since 2013. The proportion of employers who offer these programs is quite constant at just under 50%.
- Fifty-seven percent (57%) of all tickets are purchased either from a station vending machine (38%), or the South Shore Line’s mobile app (19%), an option that was not available in 2013.
- Tickets purchased at vending machines or through the mobile app may be paid for with credit or debit cards, or with an RTA Transit Benefit card. Credit cards were used by 55%. The only other place a credit card can be used to buy tickets is at Millennium Station in Chicago.
- Fewer buy tickets from an agent than in 2013, 16% compared to 29%, and fewer buy tickets from conductor, 8% compared to 12%.
- Of those who buy tickets from an agent, 19% prefer that method of purchase. Only 2% were unaware of other purchase options, and only 1% do not have a bank account.
- The average number of 10-ride tickets purchased each month is 2.5.
- The ticket-by-mail program has been eliminated.

Exhibit 20. Ticket Purchase Location			Exhibit 21. Ticket Payment Method		
	2013	2018		2013	2018
Agent, downtown Chicago	19%	14%	RTA Transit Check, RTA Mastercard or similar program	12%	13%
Agent, other location	10%	2%	Employer purchased transit fare	14%	15%
Tax-Free Commuter Benefit Program	15%	15%	Credit card	0%	55%
Station Vending Machine	36%	38%	Cash	0%	14%
South Shore's Mobile App	0%	19%	None of the above	75%	6%
Ticket-By-Mail Program	5%	0%	<i>Note: Columns may not sum to 100% due to rounding</i>		
Buy Online Program	1%	4%			
Conductor on the train	12%	8%			
Other	2%	1%			

Note: Columns may not sum to 100% due to rounding

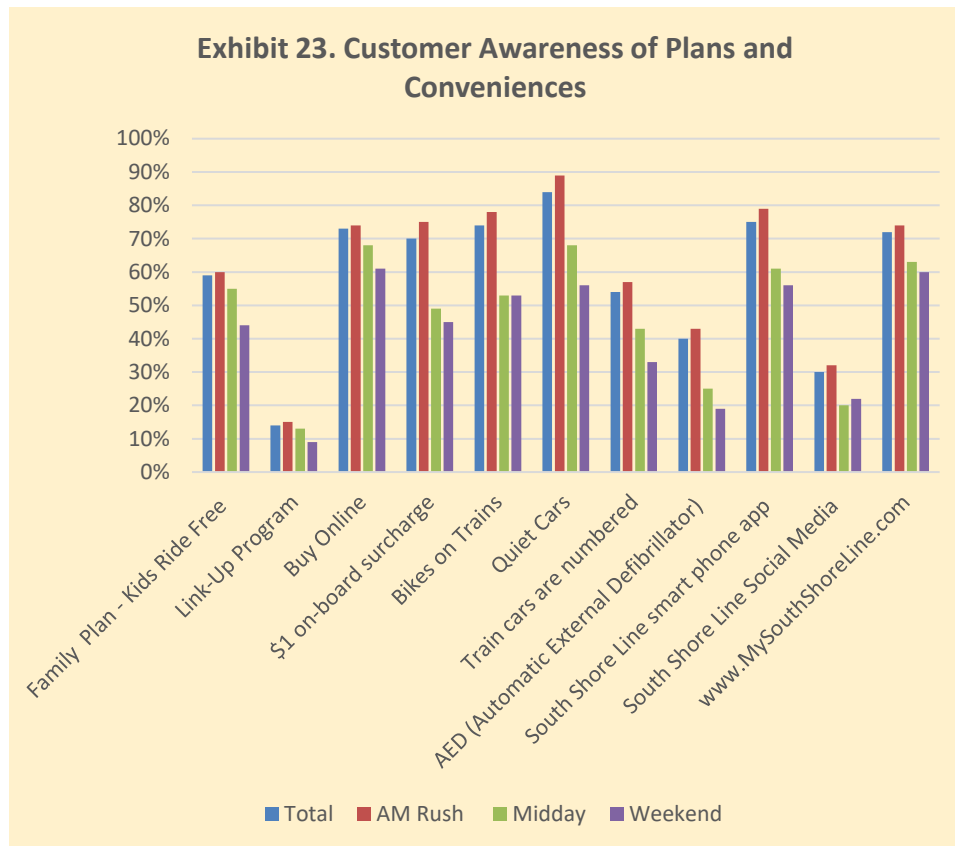
Respondents are quite aware of other options for easing their trip connections and for minimizing fare costs. Since 2013, awareness of alternatives or enhancements has improved in every category except the “\$1 on-board surcharge.” It appears that there is an opportunity to market family plan fares more aggressively among discretionary or weekend riders.

Exhibit 22. Awareness of Ticket Options					
	2013 Total	2018 Total	AM Rush	Midday	Weekend
Family Plan - Kids Ride Free (off-peak/weekend)	0%	59%	61%	55%	44%
Family Fares	30%	0%	0%	0%	0%
Link-Up Program	12%	14%	15%	13%	9%
Buy Online	36%	73%	74%	68%	61%
\$1 on-board surcharge	73%	70%	75%	49%	45%

Notes: 1. Columns do not sum to 100%; respondents could select multiple answers
2. Kids Ride Free not available in 2013

The exhibit displaying customer awareness of plans and conveniences confirms widespread understanding of available programs and communications methods. One area that could be promoted

more is the availability of AEDs (defibrillators). Perhaps conductors could make announcements on rush period trains for a period of time (3 months, for example), and on off-peak and weekend trains for an unlimited period.



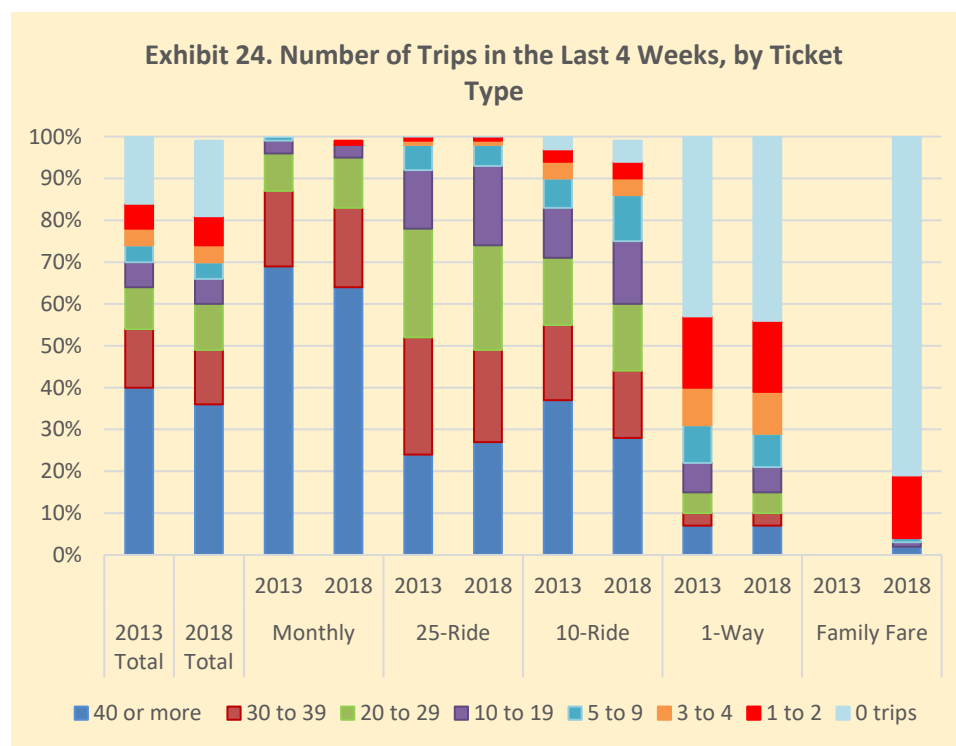
There is a particularly high awareness of MySouthShoreLine.com, as well as the South Shore Line smart phone app among people of all ages. In both cases, awareness for those between 18 and 59 years old ranges from 70% to 83%.

Awareness of South Shore Line social media is lower, ranging from 20% to 32%.

SOUTH SHORE LINE USAGE PATTERNS

Travel Frequency

The largest group of survey respondents, 36%, take the South Shore Line at least 40 times during a four-week period, down from 40% in 2013. Proportionally, this same group has decreased its use of monthly tickets; 64% now use them, compared to 69% in 2013. This is somewhat offset by their increased use of 25-Ride tickets, (27% from 24%). Reinforcing the significance of the discretionary travel market, the next highest incidence is among those who took no other trips (0 trips) in the previous four weeks. This group accounted for 18%, similar to 2013. There has been an overall 2% increase in travel between 10 and 19 times per month; as a proportion of 25-ride and 10-ride tickets, the increases are from 14% to 19%, and from 12% to 15% respectively.

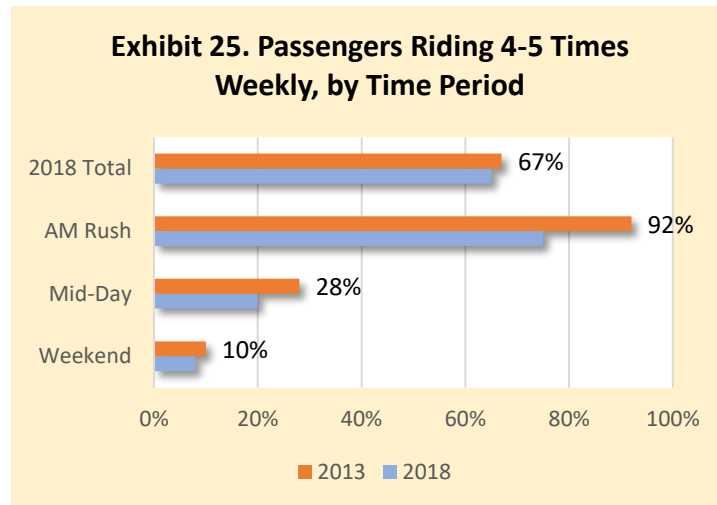


Note: The Family Fares/Kids Ride Free fare has been changed since 2013. Refer to the text.

Over 40% of those traveling on a one-way ticket at the time of the survey had not used the South Shore Line during the last four weeks, but monthly ticket users accounted for 64% (70% in 2013) of those who traveled 40 or more times.

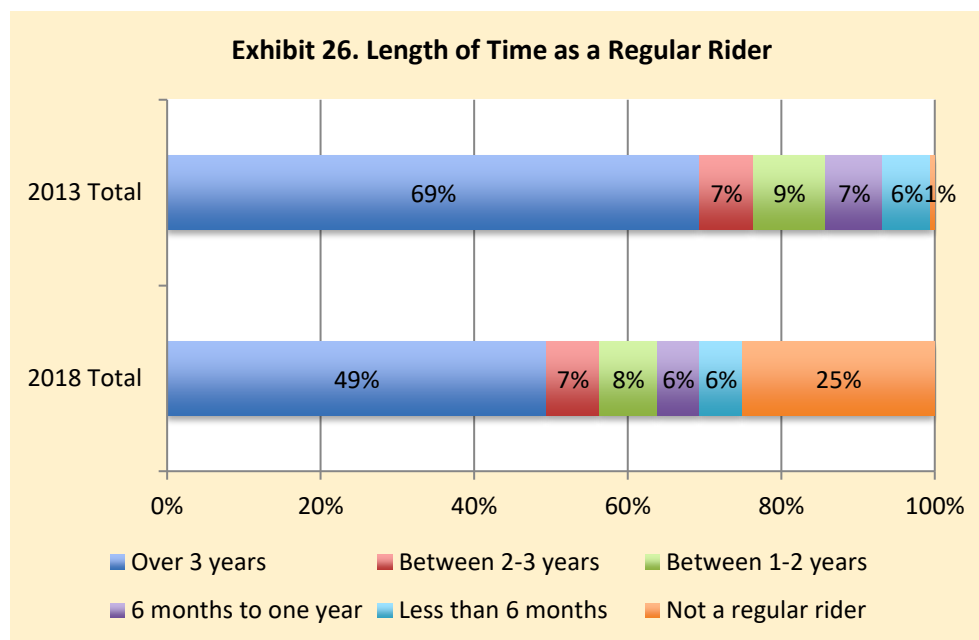
- Although fewer numbers of 10-ride and 25-ride ticket holders rode 40 times or more, this frequency of travel, just under 30% in both instances, is the highest among those ticket holders, and indicates that there is substantial demand for cost-saving types of tickets.
- Thirty-nine percent (39%) rode fewer than 20 times in the past four weeks, while 25% of riders rode 1-2 times, or 0 times, substantially unchanged since 2013.

- Not surprisingly, passengers who ride 4-5 times per week, defined as a regular rider in this survey, are almost exclusively those who travel during the AM Rush period.



Length of Time as a South Shore Line Customer

Passengers were asked how long they have been regular South Shore Line riders; almost 50% stated they have been regular riders for more than 3 years, compared to about 70% in 2013. Another big change in the last five years is the proportion of people who are not regular riders, 25%, compared to only 1% in 2013.



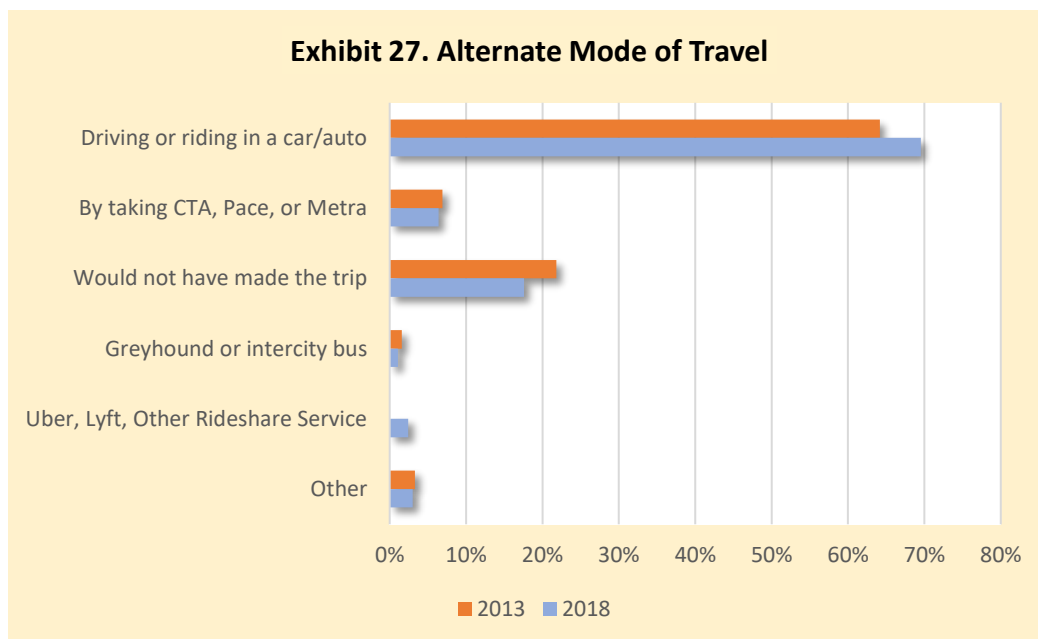
Alternatives to the South Shore Line

Most respondents, over 80%, have alternative means of travel if the train were not available and can be considered “choice” riders.

- Of these, more than 70% would make the trip by car, compared to 66% in 2013, a change that may result from the slightly lower cost of auto use.
- Either because another mode would not have been an attractive option, or because no other mode was available, 18% would not have made the trip. This is fewer than the 22% in 2013, correlating with the 4% increase in those who would travel by car. Another 12% did not have a car available, perhaps making them more dependent on the South Shore Line.
- The availability of rideshare services like Uber, Lyft, Via or other ride share service adds a new dimension and would be used by 2%.

Other interesting details about travel alternatives for South Shore Line customers are:

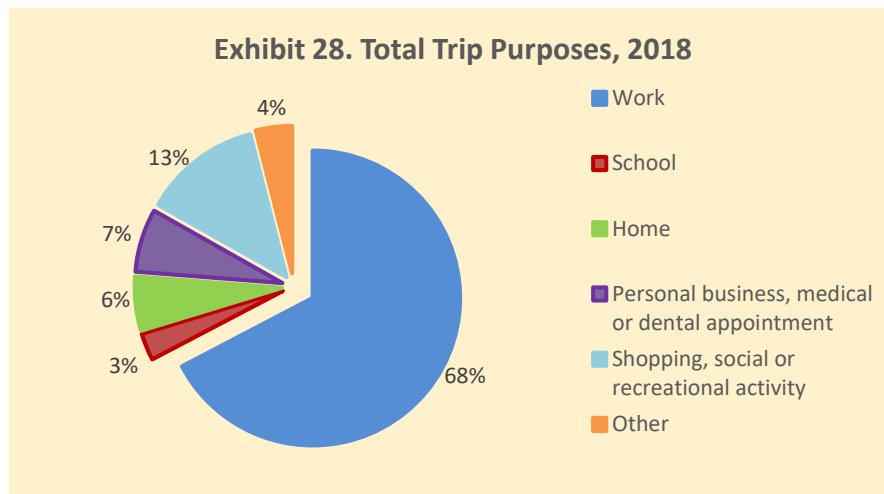
- The largest proportion of those who would not make the trip, over 22%, board in the South Bend to Hudson Lake station group, followed by 19% in the Gary group’s three stations.
- More of those who would travel by car, 77% to 78%, board between Portage/Ogden Dunes and Michigan City.
- The most who would take CTA, Pace or Metra, 30%, board in Hegewisch.
- The most who would take Uber, Lyft or another rideshare service, 4%, board in Chicago in the 57th to 63rd Street station group, followed by Hegewisch, 3.6%, and the Gary group, 3%.



TRIP CHARACTERISTICS

Trip Purpose

The preponderance of trips, 68%, is work-related. However, the South Shore Line enjoys a more diverse market than other railroads that are oriented to a major urban center. For example, results of Metra's 2014 passenger survey indicated that 90% of all trips were work-related. Some of the South Shore Line's diversity undoubtedly relates to the fact that, in addition to serving Chicago's downtown, the line also serves the Indiana Dunes National Lakeshore and the Indiana Dunes State Park, although this survey was administered during Spring, instead of Summer when the Northern Indiana area draws more visitors. In the future, NICTD might consider exploring whether more recreational trips are taken in Summer, and whether more of them are eastbound on summer weekends.



Most riders make work trips during the AM Rush. During Midday, the greatest number, almost one-half, are destined for home. However, trips for shopping, social and recreational purposes continue to be important, comprising 20% of all trips.

Weekend trips present an entirely different picture, with 77% made for purposes unrelated to school, home or work. This year, more refined information pertaining to the nature of those non-work trips was obtained and is presented in the following exhibits.

- Interestingly, weekend riders are destined for a greater variety of places; the top four are related to personal business, "other," shopping and museums.
- Weekend riders are doing interesting things: 10% are going to the museums, 6% are going to athletic events, and 5% are headed to the theater.
- After home, Midday riders are most often headed for personal business and "other." The proportion of trips for medical and dental purposes in any period is insignificant.

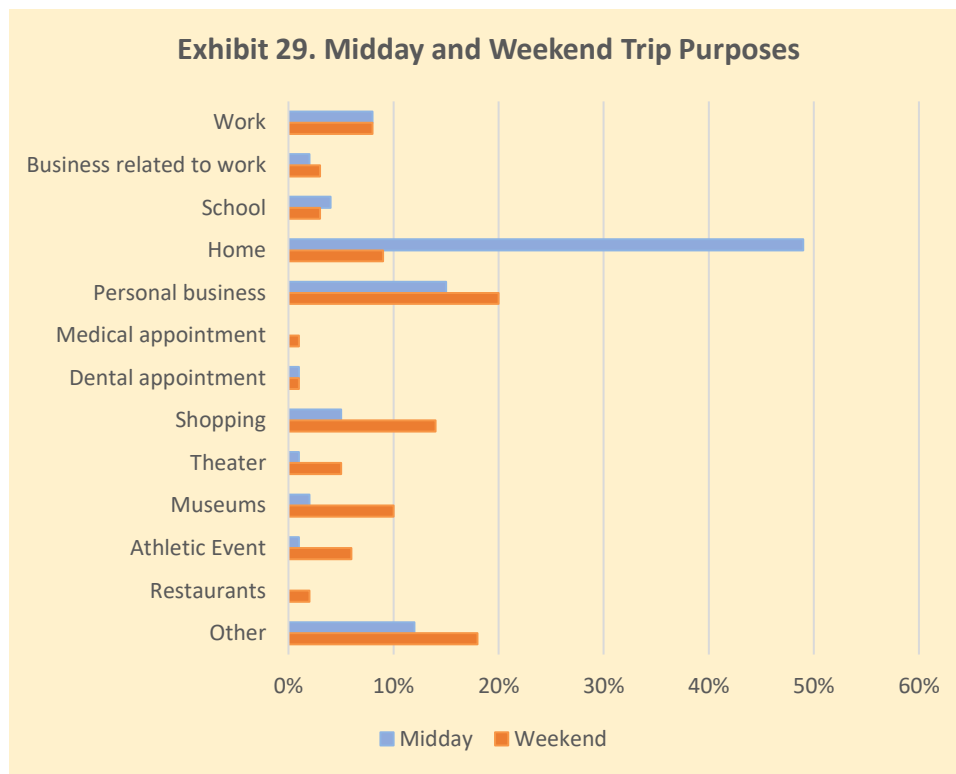


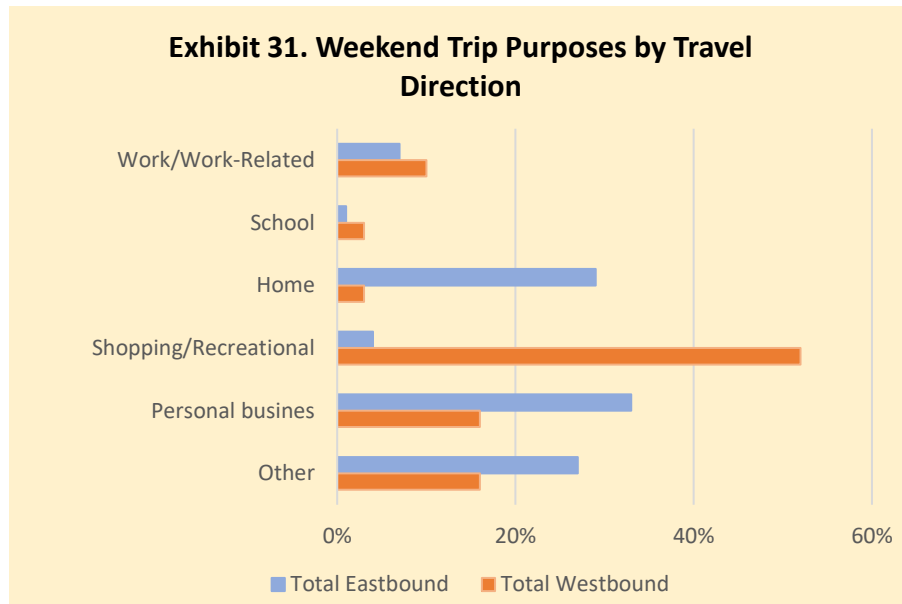
Exhibit 30 . Trip Purpose by Time of Travel

	2018 Total	AM Rush	Midday	Weekend
Work	67%	79%	8%	8%
Business related to work	1%	1%	2%	3%
School	3%	3%	4%	3%
Home	6%	2%	49%	9%
Personal business	6%	4%	15%	20%
Medical appointment	1%	1%	0%	1%
Dental appointment	0%	0%	1%	1%
Shopping	5%	3%	5%	14%
Theater	1%	0%	1%	5%
Museums	5%	5%	2%	10%
Athletic Event	2%	0%	1%	6%
Restaurants	0%	0%	0%	2%
Other	4%	3%	12%	18%

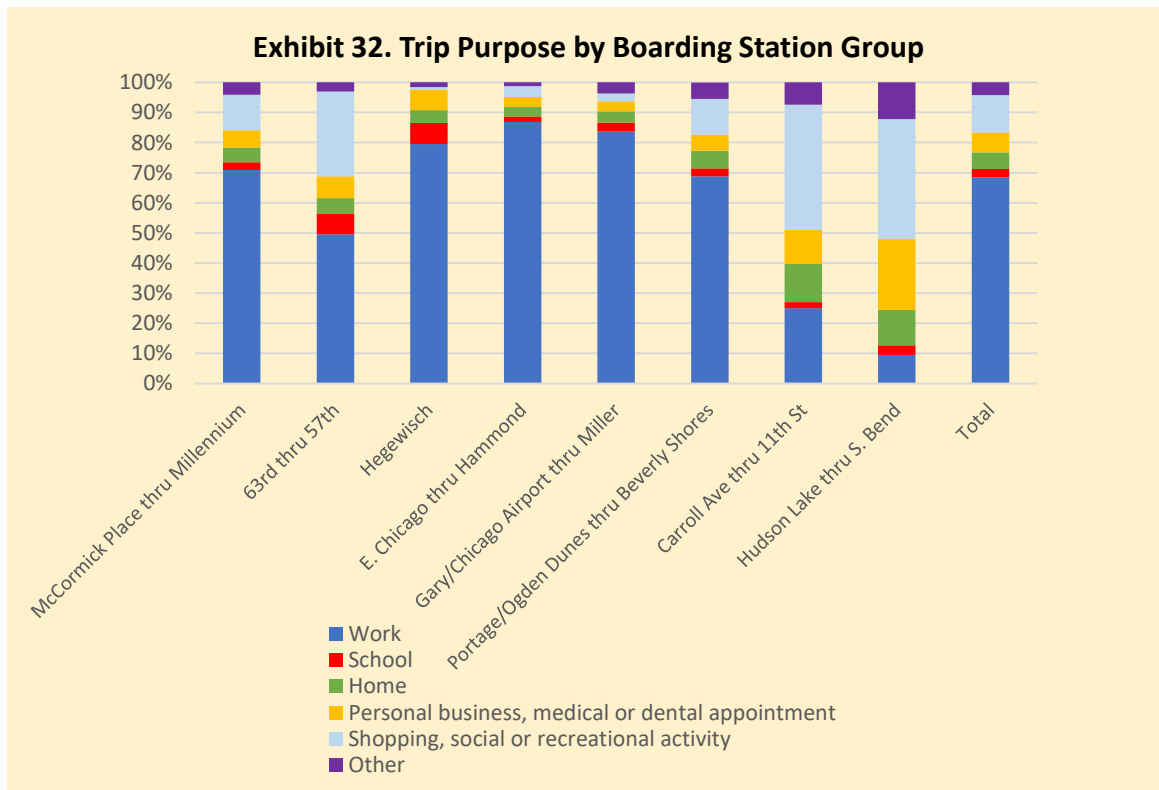
Note: Columns may not sum to 100% due to rounding

Weekend trip purposes by travel direction shed some light on the discretionary travel market. It may be that the proportion of those traveling eastbound for recreational purposes would increase during the summer, something that a summer weekend survey would determine. In any case, encouraging

people to use the train for recreational travel to the Indiana Dunes National Lakeshore and Indiana Dunes State Park is a market opportunity that should be pursued.



It is also interesting to examine trip purpose by originating station group. With the exception of trips originating in the 57th to 63rd Chicago stations, the proportion of work trips generally diminishes as the distance from the Chicago CBD increases. Most trips being made by those boarding the trains from 11th St. in Michigan City and east, are for shopping, social or recreational purposes.



STATIONS, ACCESS AND EGRESS

The busiest station in the system, measured by boarding volumes on trains that arrive at or depart

Exhibit 33. Respondents by Boarding Station (%)

Station Name	2013	2018
South Bend	8%	9%
Hudson Lake	<1%	<1%
Carroll Ave	5%	6%
11th Street	2%	2%
Beverly Shores	1%	1%
Dune Park	10%	10%
Portage/Ogden Dunes	4%	5%
Miller	7%	7%
Gary Metro Center	6%	6%
Gary/Chicago Airport	2%	2%
East Chicago	23%	24%
Hammond	13%	13%
Hegewisch	11%	8%
63rd Street	<1%	0%
57th Street	1%	<1%
McCormick Place	<1%	0%
Museum Campus/11th Street	<1%	<1%
Van Buren Street	1%	1%
Millennium Station	6%	7%

from Millennium Station before 1:00 pm is East Chicago (24% of all boarding passengers), followed by Hammond (13%), Dune Park (10%), South Bend (9%) and Hegewisch (8%). With the exception of Hegewisch, where 11% of all passengers boarded in 2013, there is very little change in relative volumes over the 5-year period. Together, these five stations account for 64% of all South Shore Line passengers.

Over 80% board at stations in the western portion of the route, between Dune Park and downtown Chicago.

Hegewisch and the neighboring stations in Hammond and East Chicago account for nearly half (45%) of the ridership. This bi-state region of the Chicago metropolitan area is an important segment of ridership for the South Shore Line service.

Hegewisch is the only Illinois station, other than Millennium Station, with any significant number of passengers.

Station Access

Personal auto is by far the preferred mode of access to the stations, up 5% since 2013.

- While 64% drove alone and parked, another 24% were either dropped off or carpooled (either as a driver or passenger), and 2% used Uber, Lyft, Via or another ride share service, making the number of respondents who used an automobile to access South Shore Line service total 90%.
- The remaining 10%, those not using automobiles, include 6% who walk, 3% who take some form of public transportation (Pace bus, CTA bus, CTA train, East Chicago Transit, and Gary PTC), and a few (0.3%) who bicycle to the station.
- Proportionally more people walk at Hegewisch (12%), Michigan City (10%) and 57th to 63rd (9%) than elsewhere.
- Systemwide, during Midday, over 40% walk.
- Carpooling is a significant access mode for over 30% of the weekend riders.

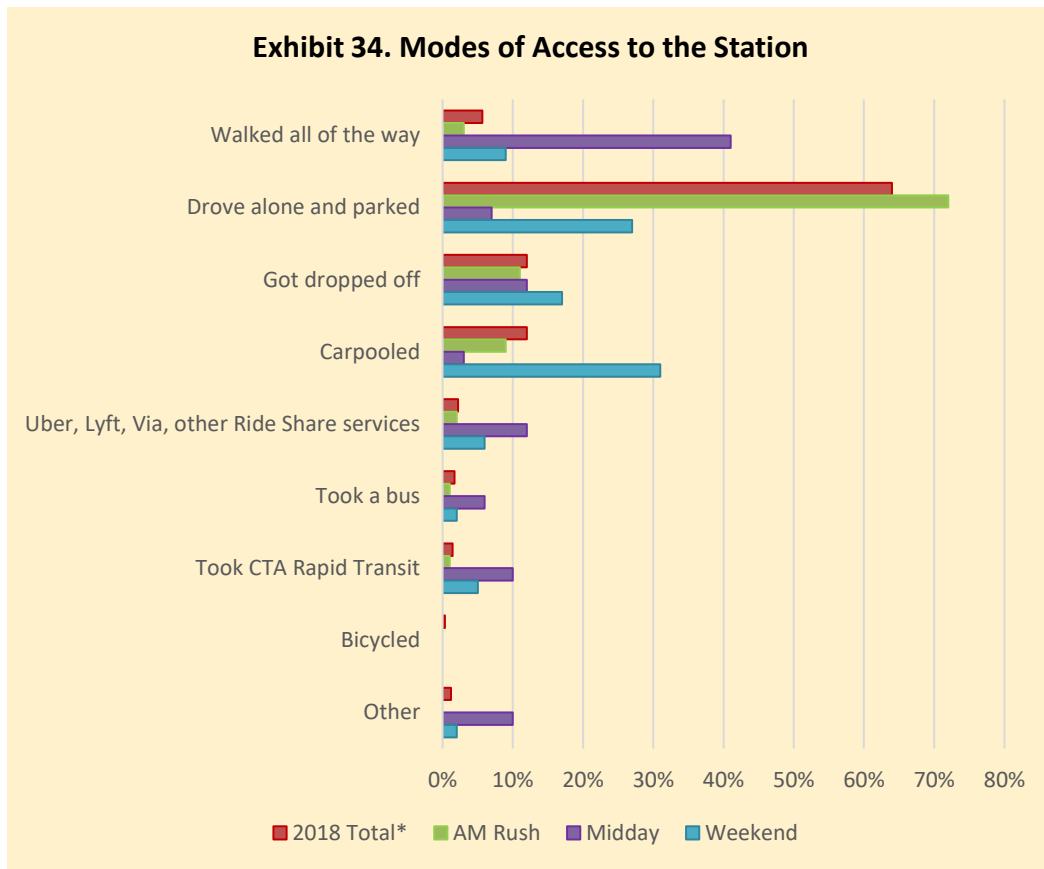


Exhibit 35. Boarding Passengers' Modes of Access

	2013 Total	2018 Total*	AM Rush	Midday	Weekend
Walked all of the way	6%	5.6%	3%	41%	9%
Drove alone and parked	59%	64.0%	72%	7%	27%
Got dropped off	14%	12.0%	11%	12%	17%
Carpooled as driver	6%	6.0%	5%	2%	15%
Carpooled as passenger	8%	6.0%	4%	1%	16%
Took East Chicago Transit	0%	0.1%	0%	1%	0%
Uber, Lyft, Via, other Ride Share services	0%	2.2%	2%	12%	6%
Took a Pace bus	1%	0.3%	0%	1%	0%
Took a CTA bus	1%	0.8%	1%	3%	2%
Took CTA Rapid Transit	2%	1.4%	1%	10%	5%
Took Gary PTC	0%	0.4%	0%	1%	0%
Bicycled	0%	0.3%	0%	0%	0%
Other	2%	1.2%	0%	10%	2%

**Because rounding to the nearest whole percent would present a false impression that no riders used some of the access modes, figures in this column are extended to one decimal point*

Note: Columns may not sum to 100% due to rounding

Station Egress

Eighty-four percent (84%) of the South Shore Line riders are destined for Chicago’s central area, with the majority, 57%, alighting at Millennium Station, another 23% alighting at Van Buren Station and 4% getting off the train at the Museum Campus. The remaining 16% alight at all other sixteen stations.

Exhibit 36. Respondents by Exiting Station

Station Name	Number	Percent
Millennium Station	1,803	57%
Van Buren Street	718	23%
Museum Campus/11th Street	137	4%
McCormick Place	13	<1%
57th Street	99	3%
63rd Street	1	<1%
Hegewisch	33	1%
Hammond	34	1%
East Chicago	56	2%
Gary/Chicago Airport	6	<1%
Gary Metro Center	28	1%
Miller	16	1%
Portage/Ogden Dunes	12	<1%
Dune Park	54	2%
Beverly Shores	5	<1%
11th Street	27	1%
Carroll Ave	49	2%
Hudson Lake	5	<1%
South Bend	87	3%

While downtown Chicago represents the most important travel market for the South Shore Line, passengers in significant numbers are destined for South Bend (3%), Dune Park (2%), and Carroll Avenue (2%), suggesting that these Indiana locations are popular attractions for the leisure market, and the Notre Dame student market as well.

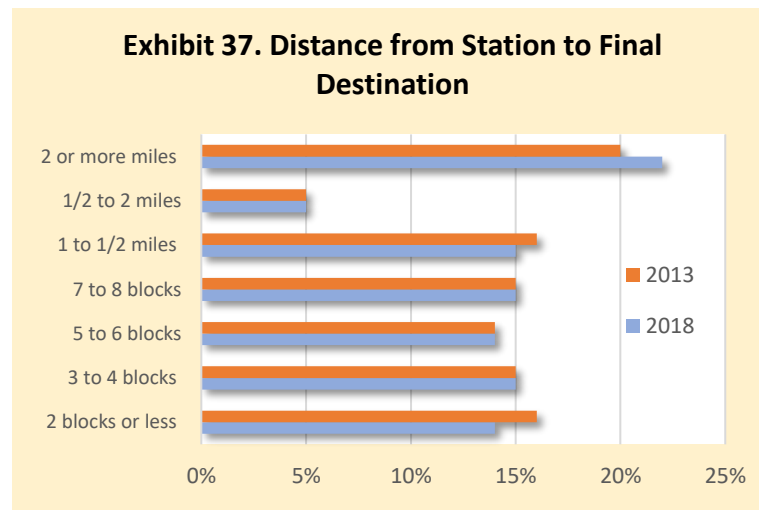
The other stations that had any significant number of exiting passengers are 57th Street (3%), which serves the Museum of Science and Industry, the University of Chicago and other educational institutions, and East Chicago (2%). On weekends, 7% egress at the Museum Campus, 6% at Dune Park and 6% at South Bend, reinforcing the importance of the recreational and student markets.

Leaving the train station, 70% walk to their final destination; 9% take either CTA bus or rapid transit, down from 11% in 2013; and 4% take a taxi or private

shuttle, down from 5% in 2013. Now, 3% use Uber, Lyft, Via or other ride share service, which offsets the changes in CTA and taxi or shuttle, illustrating the possible impact of rideshare competition.

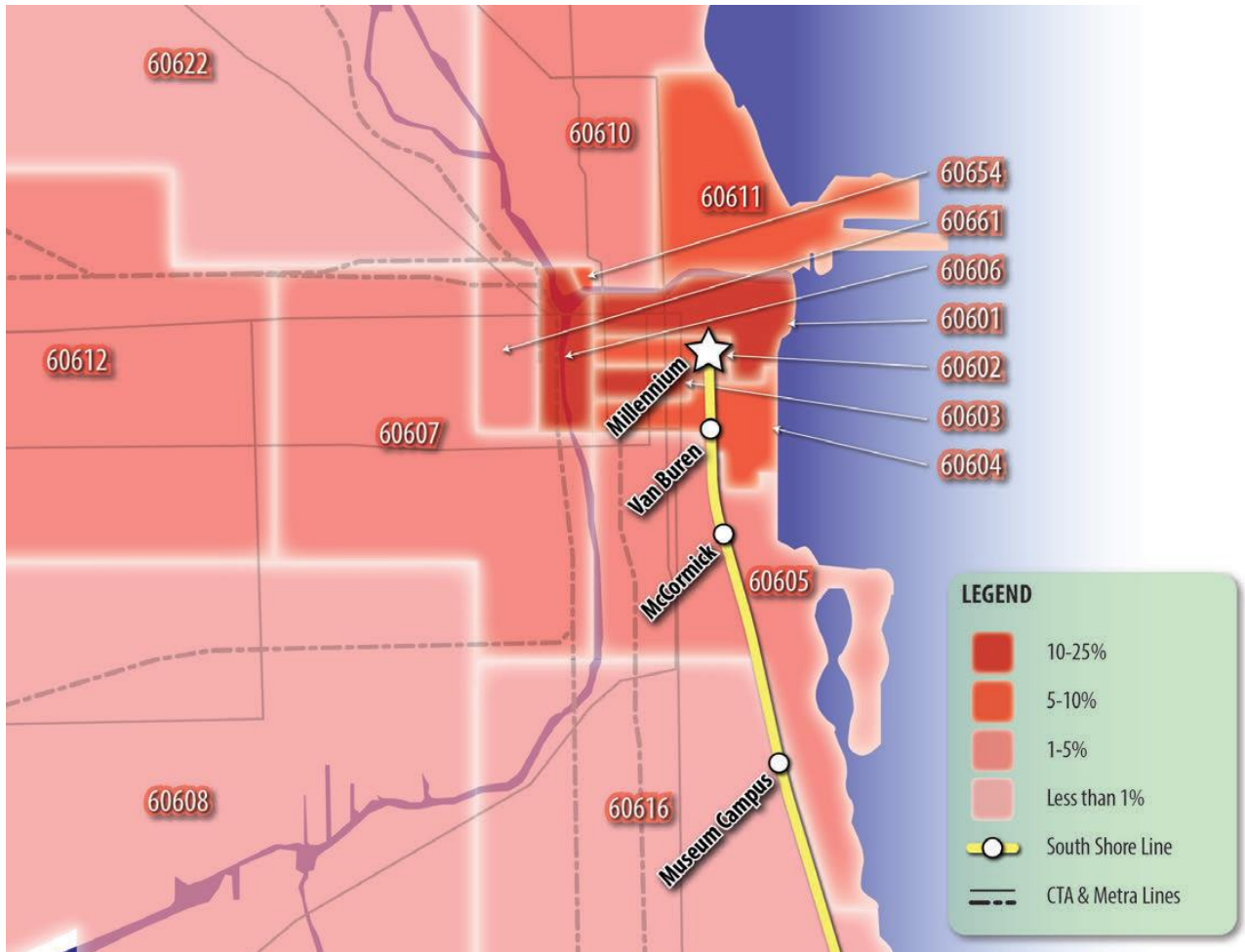
As far as distance to one’s final destination, 58% travel 8 blocks or less, and 22% travel two or more miles. Five years ago, 20% traveled two or more miles, so there is a slight upward change here, one that should be monitored over the longer term to determine whether this trend continues and whether there is an advantage to facilitating connections for the last leg of the trip.

The map showing extended central Chicago by zip code displays the



concentrations of destinations. There is virtually no change in the proportional distribution of those destined for downtown locations since 2013.

Exhibit 38. Final Destination by Zip Code, Relative to Central Area Stations



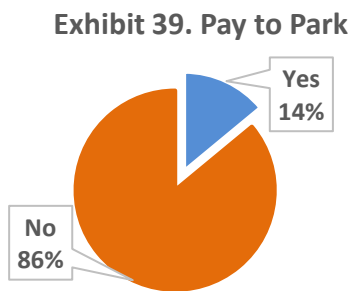
PARKING

As more than three-fourths (76%) of South Shore Line’s riders access the station either by driving alone and parking, or by carpooling, station parking is a very important accommodation. The aspects of parking that are addressed in this survey are cost, availability and vehicle security in the parking area.

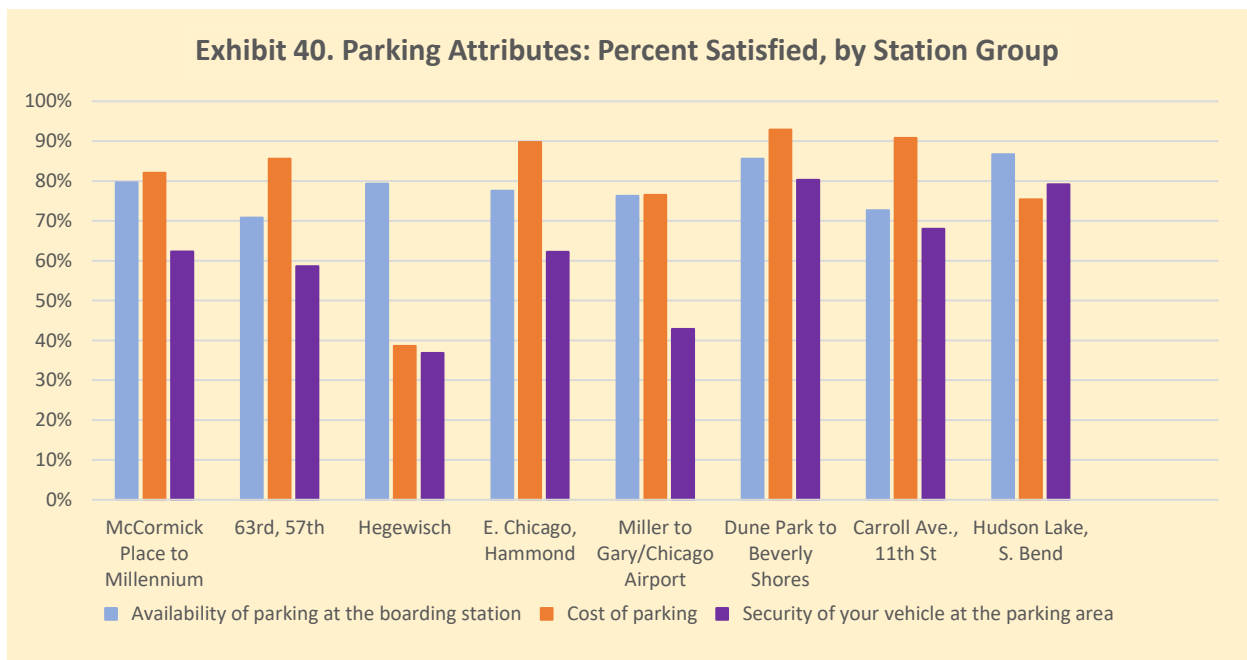
Parking Cost

There are only three stations in the South Shore Line system where one must pay to park, and none of them are facilities that are administered by NICTD. They include Hegewisch, where parking costs are controlled by Metra and are consistent with the parking fee structure throughout the Metra system; Gary Metro Center, controlled by the City of Gary; and South Bend Airport, under airport jurisdiction.

In 2018, 86% of respondents indicated that they did not pay to park; this represents a 6% increase since 2013 and raises the question as to whether people are shifting from paid lots to free lots elsewhere on the system. While the data to answer this question are not available through this survey, NICTD may have periodic parking counts that could provide insight.



At Hegewisch, only 39% are satisfied with the cost of parking, the lowest level on the system. On average, though, 82% are satisfied with the cost of parking throughout the system, up from 75% in 2013.



Vehicle Security in the Parking Areas

As in 2013, the greater level of concern is with vehicle security in parking areas. On an overall basis, more customers are satisfied now than in 2013, 63% compared to 57%, but it continues to rank among the five lowest attributes.

- At Hegewisch, vehicle security satisfaction is even lower than satisfaction with parking cost, 37%. This facility continues to be jointly secured by NICTD and the Metra police departments. In 2013, it was recommended that the agencies work together to develop a program and strategy for addressing the problem. NICTD's police work closely with Metra police and the Chicago Police Department's 4th District. They report that any criminal activity or tips are circulated through each department in order to create a safe environment for commuters. The police departments should continue working together to identify additional opportunities for security improvements.
- The security attribute ranks poorly at the Gary stations too, with 43% satisfied. Other groups of stations where fewer than 70% of customers are satisfied are: Michigan City (68%); Chicago's central area, 62%; East Chicago-Hammond, 62%; and 57th--63rd, 59%.

Since parking is such an important feature of the South Shore Line System, NICTD should continue its outreach to local police departments and governments to obtain support in addressing security concerns, focusing on Hegewisch and the Indiana communities that are the core of the South Shore Line service.

Parking Availability

As to availability of parking, 79% are satisfied, unchanged since 2013. The lowest level of satisfaction, 71%, occurs in Chicago at the 57th to 63rd station group, and is followed closely by Michigan City, at 73%. On the other hand, in the Hudson Lake to South Bend and the Dune Park to Beverly Shores station groups, patrons are 87% and 86% satisfied, respectively.

With a mean score of 4.14 out of a possible 5, parking availability was one of the higher ranked attributes just below the top five displayed in the Executive Summary.

CUSTOMER SATISFACTION

General Service Ratings

Overall, South Shore Line service is highly rated, with between 67% and 80% of the customers indicating, per the general measures, that they are satisfied, with one exception—frequency of

Exhibit 41. Ranking of General Satisfaction Criteria

	Satisfied	Neutral	Dissatisfied
Customer service	80%	15%	5%
Overall rating of the South Shore Line	79%	12%	8%
Getting to destination on time	79%	11%	9%
Frequency of on-time arrival	77%	13%	9%
Getting to destination quickly	72%	16%	12%
Reliability of train equipment	67%	18%	15%
Frequency of service	57%	17%	26%

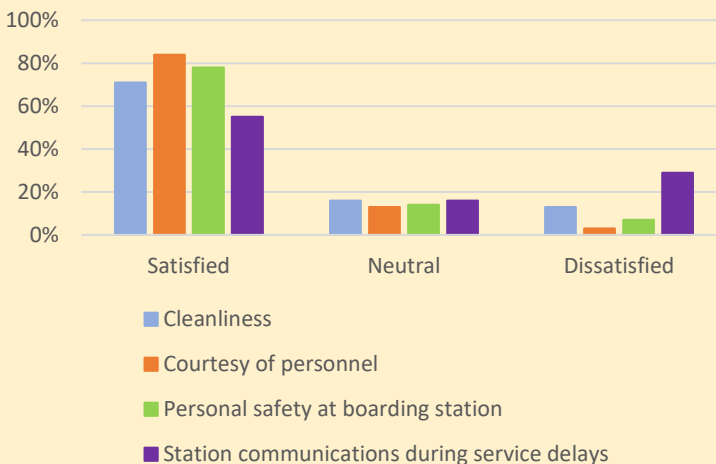
service, which was also of concern in 2013. There has been a slight improvement (2%) since then, though. Other areas that have seen more than 1% change in general satisfaction are: getting to destination on time, +6%; getting to destination quickly, +5%; reliability of train equipment, +5%; and value for your money, -3%.

The majority of survey respondents also found that service quality had stayed the same over the past 12 months, with another 24% indicating it had improved (up from 20% in 2013) and 10% suggesting service had declined. This pattern holds true among passengers in all travel periods, with only incremental differences.

Exhibit 42. Quality of Service: Change in Last 12 Months

Improved Significantly	6%
Improved Somewhat	18%
Stayed the same	66%
Declined Somewhat	8%
Declined Significantly	2%

Exhibit 43. Satisfaction with Station Attributes



Evaluations of Stations

Customers evaluated various conditions at the stations. As those related to parking and vehicle security were discussed earlier, they are not addressed here.

Courtesy of station personnel continues to rank highest, with 84% satisfied, unchanged from 2013. Personal safety ratings are next highest, 78%, and improved from 74%. On the other hand, satisfaction with

cleanliness has diminished somewhat, to 71% from 75%.

And finally, station communication during service delays continues to rank lowest among this series, with only 55% satisfied and a significant 29% dissatisfied. At the Hammond-East Chicago station group, satisfaction with this measure dips to just under 50%.

In response to the 2013 survey, NICTD upgraded its audio technology, greatly improving sound quality at all stations from South Bend to Hegewisch. However, onboard upgrades to the public address system are yet to be made. Further, there are continuing efforts to improve the accuracy of train delay announcements.

On Board Attributes

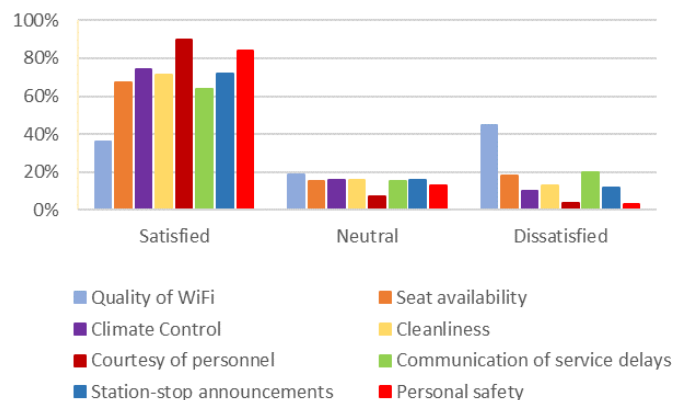
Some criteria that were ranked for stations were also ranked for conditions onboard. Others apply only on the train and are also addressed.

Top rated, at 90% satisfied, is courtesy of onboard personnel, followed by 84% satisfied with personal safety on the train. Except for WiFi, other attributes satisfy between two-thirds and three-fourths of the riders.

One area where satisfaction has diminished somewhat, to 67% from 71% satisfied, is availability of seats. This change is difficult to explain because ridership is lower than it was at the time of the 2013 survey. One possible consideration relates to the quiet car². There is one on many, but not all, trains. However, 51% of respondents indicated that they prefer to ride in the quiet car and nearly 60% think there should be more than one per train. There may not be enough quiet car capacity to accommodate people who wish to sit there, thus decreasing satisfaction with seat availability measure.

Unfortunately, there is very little satisfaction with the quality of WiFi. When the 2013 survey was done, there was no WiFi capacity on the system, and NICTD considered offering it for a fee. Subsequently, the accommodation was provided for free. Since this attribute ranks poorest, with only 36% satisfied, NICTD should consider evaluating the system with technical experts to address options for improving it. If quality can be improved only with the investment of funds, the free service should be re-evaluated with consideration to charging for it, and in the final analysis, if no improvement is possible, the possibility of dropping the service should be considered.

Exhibit 44. Satisfaction with Onboard Attributes



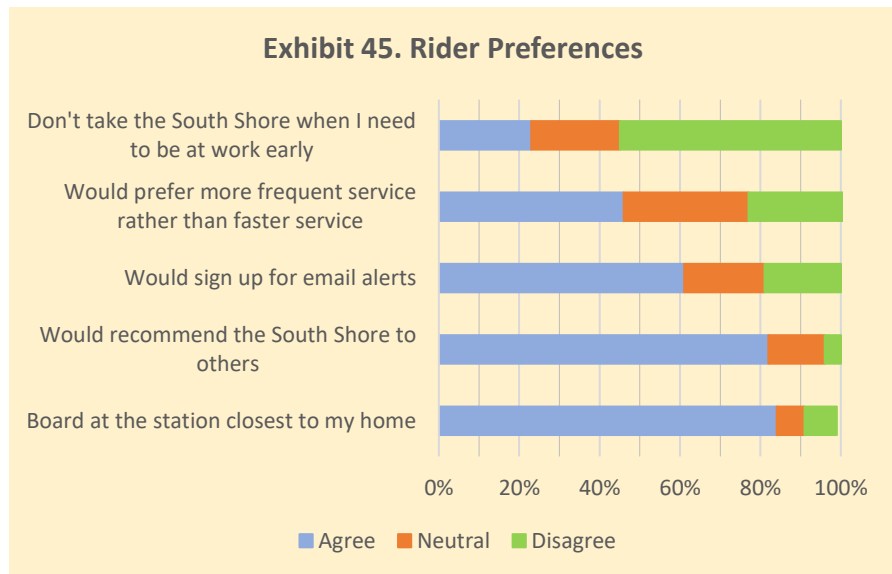
² On quiet cars, cell phone ringers must be off; there should be no cell phone conversations; headphones must be worn; and volume must be kept low.

CUSTOMER PREFERENCES

The elements of passengers' decisions to take the train are presented in the Executive Summary and are not repeated here. The same is true for the attributes that are most important to the riders: on-time arrival at one's destination; value for the money; and frequency of service.

Striving to gain further insight into travel preferences and behavior, though, the survey posed another series of questions pertaining to convenience and cost.

- Not surprisingly, 84% board at stations closest to their homes.
- More than 60% would sign up for email alerts.
- Just 46% prefer more frequent service to faster service. Another 30% or so are neutral. Similar to 2013, there is no strong consensus on this issue.

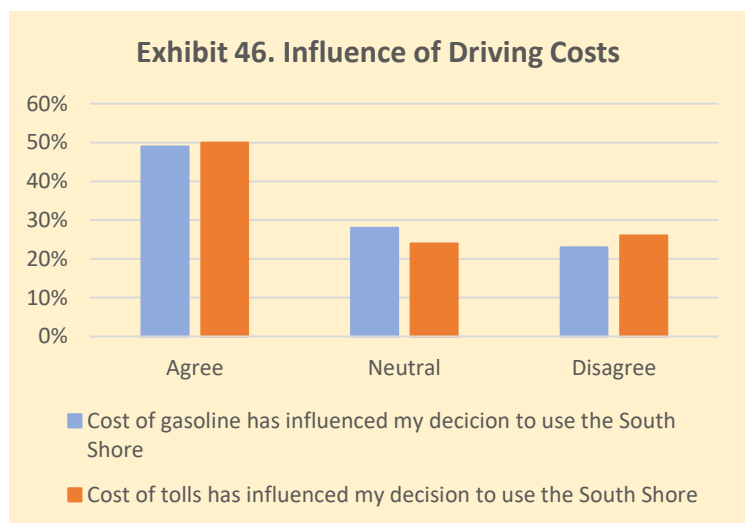


- Perhaps as a real or perceived reflection of greater traffic congestion in the region, 55% disagree that they would not take the South Shore Line when they have to get to work early, compared to 41% in 2013.
- And finally, in an important testimony of customer satisfaction, over 80% of the riders would recommend the South Shore Line service to others.

Costs seem to influence about half of the railroad's patrons, with tolls barely exceeding gas costs in this measure. In 2013, 64% were influenced by the cost of gas.

The 2013 survey addressed three other questions which were resolved in response to rider preferences.

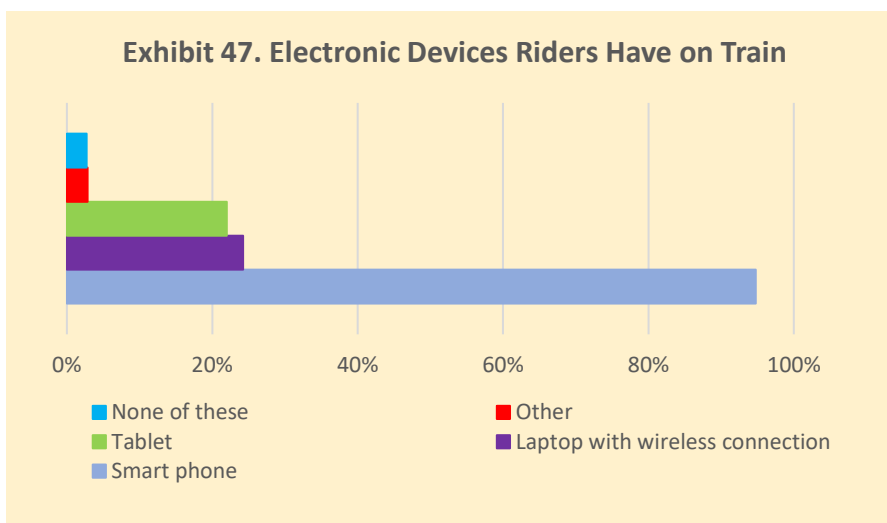
- One is the addition of quiet cars. Riders wanted them, and they have been introduced. And, as discussed previously, many riders want more quiet cars on the trains, a matter that NICTD should address.



- Another is the question of banning alcohol on the trains. As more were opposed (52%) than in favor, it was not prohibited. Riders may continue to bring alcoholic beverages onto the trains.
- Finally, was the issue of whether to allow bikes on the trains. Over 60% were in favor, despite the fact that permitting them would require removal of some seats. As a result, bikes are now permitted on selected trains, and 62% of respondents continue to think bikes should be allowed, although very few have actually taken advantage of the accommodation.

CUSTOMER RELATIONS AND MARKETING

Electronic Media



Almost all riders (97%) have electronic devices on the train, and most or all of them have wireless capability. Many riders carry more than one device.

In the electronics realm, the world has changed markedly since 2013 when 77% had smartphones. Now, they are used by 95% of the riders, an increase of 18%.

Also, in 2013, 40% had a tablet or a laptop with a wireless connection, but in 2018, 46% do. And, while 21% had “none” or “other” in 2013, now only 6% are in those categories.

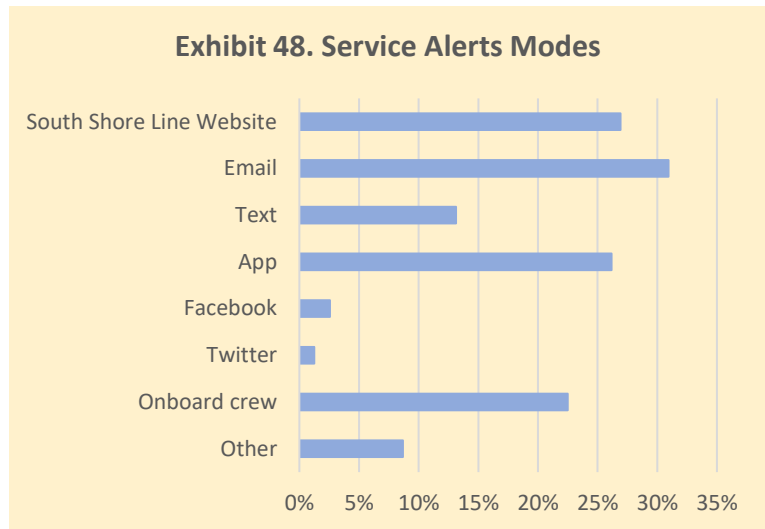
These data continue to show that South Shore Line commuters are very tech-savvy. They connect to wireless communication services, so service information can be relayed to them onboard via email, text messaging, and other electronic means. This is an important mitigating consideration for NICTD given the continuing dissatisfaction with service announcements, both at stations and onboard. Personnel should continue reminding riders that they can access service information via their electronic devices as an alternative to verbal announcements.

Service Alerts

Another successful addition to the South Shore Line's menu of information sources is the App, which was not available in 2013. Now, over one-fourth of the riders refer to it.

The website and email are other preferred electronic information modes, with the latter most frequented and used by 31% of the respondents.

Importantly, though, the onboard crew is still attractive as an information source and is used by 23%. Social media, like Facebook and Twitter, do not draw a large audience for service alerts, being attractive to only 4%.



NICTD should continue promoting and building on its successes with its website, email alerts and its App to reduce frustrations with announcements and onboard communications.

CONCLUSIONS

- NICTD should repeat the survey again in 2023, not only to conform to federal requirements, but also to gain continuing insight into trends and characteristics that pertain to its market.
- Meanwhile, NICTD should sponsor a more targeted summer weekend survey to learn more about its leisure and discretionary markets with the objectives of responding to their needs and growing its ridership. Relatedly, the South Shore Line should be marketed more aggressively to the eastbound weekend market.
- A concerted effort should be made to assure that more riders are aware of the availability of AEDs (defibrillators). Now, only 40% of the respondents are aware of this potentially life-saving amenity. Conductors could be encouraged to make periodic announcements about the devices.
- NICTD should evaluate the WiFi system with technical experts to address options for improving it. If funding is required, consider charging for WiFi. In the final analysis, if no improvement is possible, consider dropping the service.
- Address the feasibility of adding an extra quiet car to selected trains. If feasible, add some on a trial basis to evaluate the merits of permanent additions.

Other recommendations from the Executive Summary are:

- NICTD should examine whether there is any correlation between the series of fare increases that have occurred over the five-year period and the changing demographic profile of the South Shore Line rider.
- Capacity permitting on weekend trains, family fares should be marketed aggressively to increase off-peak ridership.

APPENDIX A - ORIGIN LOCATION OF SURVEY RESPONDENTS

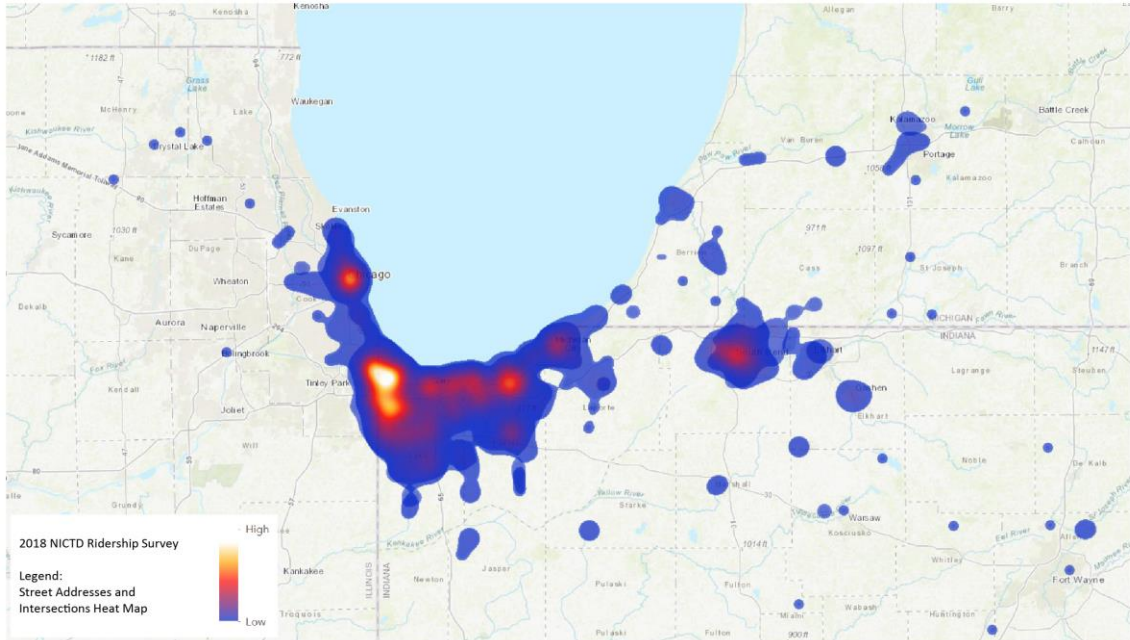


Table AA-1: Origin Location of Survey Respondents by State and County

LAKE COUNTY, IN		PORTER COUNTY, IN		LA PORTE COUNTY, IN	
Location	Total	Location	Total	Location	Total
Cedar Lake	13	Boone Grove	2	Hanna	1
Crown Point	132	Kouts	3	Union Mills	1
Dyer	175	Beverly Shores	8	Wanatah	3
East Chicago	68	Hebron	9	Rolling Prairie	6
Gary	213	Valparaiso	133	Westville	10
Griffith	67	Portage	146	La Porte	42
Hammond	261	Chesterton	165	Michigan City	86
Highland	135	Total Porter County, IN	466	Total La Porte County, IN	149
Hobart	74				
Lake Station	15	ST. JOSEPH COUNTY, IN			
Lowell	13	Location	Total		
Merrillville	117	Granger	18		
Munster	172	Lakeville	1		
Saint John	44	Mishawaka	32		
Schererville	109	New Carlisle	3		
Shelby	2	North Liberty	1		
Whiting	22	Notre Dame	7		
Total Lake County, IN	1632	Osceola	2		
		South Bend	76		
		Walkerton	1		
		Total St. Joseph Co., IN	141		

*2018 South Shore Line Rider Survey
Report to NICTD*

OTHER INDIANA COUNTIES			MICHIGAN			ILLINOIS			
	Location	Total		Location	Total		Location	Total	
OTHER INDIANA COUNTIES	ALLEN			Allegan County	8		Chicago	204	
		Harlan	1		Berrien County	78		Calumet City	59
		Huntertown	1		Calhoun County	5		Lansing	66
		Fort Wayne	7		Cass County	19		Other Cook County	32
		Leo	4		Eaton County	4		Other Illinois	17
		ELKHART			Kalamazoo County	25		Total IL	378
		Goshen	16		Kent County	45			
		Nappanee	4		Ottawa County	41			
		Elkhart	25		Van Buren County	24			
		JASPER			Other Counties	42			
		Wheatfield	2		Total MI	291			
		Rensselaer	4						
		Demotte	9						
		Claypool	1						
		LEESBURG							
		Leesburg	1						
		North Webster	1						
	WARSAW								
	Warsaw	2							
	Winona Lake	2							
	Syracuse	8							
	STARKE								
	San Pierre	1							
	Ora	1							
	North Judson	3							
	Knox	5							
	Indianapolis	6							
	Other Indiana	43							
	Total Other Indiana Counties	147							

APPENDIX B - SURVEY INSTRUMENT / QUESTIONNAIRE

«ID_»

2018 SOUTH SHORE LINE RIDER SURVEY

Dear Customer,

The SOUTH SHORE LINE appreciates your patronage and values your opinions. Please complete this survey to help us improve our service to you and other customers. The information obtained from the survey will assist us in meeting our commitment to provide efficient and cost effective transportation. Please be assured that your responses will be kept confidential and that the information you provide will be reported in the aggregate only.

When you complete the survey, please return it to the survey administrator on the train or by mail (no postage required). If you are unable to complete the survey on your ride today, please return it by mail. If you have recently completed and returned this survey, **please do not complete it again**. This survey is also available online by using this Web address:

<http://tinyurl.com/2018ridersurvey>

If you wish to complete the survey online, please use this unique ID number to access the survey: «PIN_»

Thank you for your cooperation and for riding the South Shore Line!

1. ¿Usted habría deseado las preguntas disponible en español?

- Si
- No

2. Where did you start your trip to your South Shore boarding station?

- Home
- Work
- Other (Please specify) _____

3. What is your **home** ZIP code? _____ - _____

4. In what city or town did you **begin** this trip?

City _____ ZIP code _____ - _____

5. Please provide the location of the place where you **began** your trip to **THIS** South Shore station?

(Responses will be kept confidential and will be used ONLY to determine characteristics of riders' trips.)

Street Address _____

OR

Nearest Intersection:

Street 1 _____

and

Street 2 _____

6. At what station did you get on THIS train?

- South Bend
- Hudson Lake
- Carroll Ave
- 11th St
- Beverly Shores
- Dune Park
- Portage/Ogden Dunes
- Miller
- Gary Metro Ctr
- Gary/Chicago Airport (Clark Road)
- East Chicago
- Hammond
- Hegewisch
- 63rd St
- 57th St
- McCormick Place
- Museum Campus/11th
- Van Buren St
- Millennium Station at Randolph St

7. Which one of these choices best describes how you got to your South Shore boarding station TODAY? (Please check only one response.)

- Walked all of the way
- Drove alone and parked
- Got dropped off
- Carpooled as driver
- Carpooled as passenger
- East Chicago Transit
- Uber, Lyft, Via, Other Ride Share services
- Pace bus (Route # _____)
- CTA bus (Route # _____)
- CTA Train (Route color _____)
- Gary PTC
- Bicycled
 - a. Used personal bike
 - b. Used Divvy bike
- Other (Please specify)

8. If you DROVE ALONE AND PARKED or DROVE A CARPOOL VEHICLE, did you pay a parking fee?

- Yes
- No

9. What time was THIS train scheduled to leave your boarding station (according to the train schedule)?

- AM ____:____
- PM ____:____

10. What type of South Shore ticket did you use for THIS trip? (Please check only one response.)

- Monthly
- 25-Ride
- Ten-Ride (avg. # purchased per month _____)
- One-Way
- Family Fare – Kids Ride Free (How many family members? _____)
- Other (Please specify) _____

11. Where did you purchase the ticket that you used for THIS trip? (Please check only one response.)

- Agent at a downtown Chicago station
- Agent at a station outside of downtown Chicago
- Through Tax-Free Commuter Benefit program (WageWorks, Wired Commute, etc.)
- Station vending machine
- South Shore's Mobile App
- Buy Online Program
- Conductor on the train
- Other (Please specify) _____

12. If you purchased your ticket from an agent, why didn't you use the Ticket Vending Machine, online or mobile App? (Please check all that apply.)

- Prefer buying from an agent
- Not aware that I had other ticket purchase options
- No bank account
- Does not apply

13. Which of the following did you use when purchasing your ticket? (Please check all that apply.)

- RTA Transit Check, RTA Mastercard or similar program
- Employer purchased transit fare
- Credit Card
- Cash
- None of the above

14. Does your employer offer a tax-free commuter benefit program (Transit Check, RTA Transit card, WageWorks, Wired Commute, etc.)?

- Yes
- No
- Don't know
- Not employed

15. In the last 6 months, what other South Shore ticket types have you purchased? (Please check all that apply.)

- Monthly
- Ten-Ride
- One-Way
- 25-Ride
- Family Fare – Kids Ride Free (How many family members? _____)
- None

16. At which station will you get off THIS train?

(Select the name of your destination station for this one-way trip only.)

- South Bend
- Hudson Lake
- Carroll Ave
- 11th St
- Beverly Shores
- Dune Park
- Portage/Ogden Dunes
- Miller
- Gary Metro Ctr
- Gary/Chicago Airport (Clark Road)
- East Chicago
- Hammond
- Hegewisch
- 63rd St
- 57th St
- McCormick Place
- Museum Campus/11th
- Van Buren St
- Millennium Station at Randolph St

17. How far will you travel from the station in Question 16 to your final destination?

- 2 blocks or less
- 3 to 4 blocks
- 5 to 6 blocks
- 7 to 8 blocks
- 1 to 1½ miles
- 1½ to 2 miles
- 2 or more miles

18. What is the ZIP code of your final destination?

_____ - _____

19. Which of these choices best describes how you will get to your final destination from the South Shore station TODAY? (Please check only one response.)

- Walk all of the way
- CTA bus (Route # _____)
- CTA Train (Route color _____)
- Private shuttle bus/van
- Taxi
- Uber, Lyft, Via, Other Ride Share service
- Pace bus (Route # _____)
- River Bus/River Taxi
- Gary PTC
- Get picked up
- Drive alone
- Carpool as a driver
- Carpool as a passenger
- Transfer to a Metra train
- Bicycle
 - a. Use personal bike
 - b. Use Divvy bike
- East Chicago Transit
- Other (Please specify) _____

20. What is the destination of THIS trip?

- Work
- Business related to work
- School
- Home
- Personal business
- Medical appointment
- Dental appointment
- Shopping
- Theater
- Museums
- Athletic Event
- Restaurants
- Other (Please specify) _____

21. Excluding TODAY, how many times would you estimate that you have ridden the South Shore in the LAST FOUR WEEKS? (Please count each inbound trip and outbound trip separately.)
- 40 or more trips
 - 30-39
 - 20-29
 - 10-19
 - 5-9
 - 3-4
 - 1-2
 - Did not ride
22. During the past 12 months, would you say overall quality of service on your rail line has ...
- Improved Significantly
 - Improved Somewhat
 - Stayed the same
 - Declined Somewhat
 - Declined Significantly
 - Not applicable
23. Do you ride the South Shore at least 4-5 days per week (Regular Rider)?
- Yes
 - No
24. About how long have you been a REGULAR RIDER?
- Over 3 years
 - Between 2-3 years
 - Between 1-2 years
 - 6 months to one year
 - Less than 6 months
 - Not a regular rider
25. Have you ever brought your bike on the train?
- Yes – How many times in the last year? (specify)

 - No
26. Do you think bikes should be allowed on more trains?
- Yes
 - No
27. The South Shore has implemented a “Quiet Car” on peak service trains. *(On the Quiet Car cell phone ringers must be off, there should be no cell phone conversations, headphones must be worn and volume must be kept low. In-person conversations should be kept short and in subdued voices)*
- Do you prefer to ride in the Quiet Car?
- a. Yes
 - b. No
- Do you think that more than one “Quiet Car” per train should be considered?
- a. Yes
 - b. No

28. Please rate how satisfied you are with the South Shore for each statement below. Would you say you are **completely satisfied (5)**, **somewhat satisfied (4)**, **neither satisfied nor dissatisfied (3)**, **somewhat dissatisfied (2)**, or **completely dissatisfied (1)**

		Completely Satisfied	Somewhat Satisfied	Neither Satisfied nor Dissatisfied	Somewhat Dissatisfied	Completely Dissatisfied	
Please check only one box for each item		5	4	3	2	1	N/A
Station	a. Cleanliness of the stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b. Courtesy of station personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c. Personal safety at the boarding station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d. Station communication during service delays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e. Availability of parking at the boarding station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f. Cost of parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g. Security of your vehicle at the parking area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h. Quality of Wi-Fi	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On-Board	i. Availability of seats on the train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	j. Climate Control (A/C / Heating)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	k. Cleanliness of the train car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	l. Courtesy of on-board personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	m. On-board communication of service delays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	n. Station-stop announcements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	o. Personal safety on the train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General	p. Overall rating of the South Shore Line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	q. Value for your money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	r. Getting to destination on time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	s. Getting to destination quickly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	t. Frequency of service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	u. Frequency of on-time arrival	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	v. Reliability of train equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	w. Customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

29. Please select the THREE items to Question 28 that are MOST IMPORTANT to you. (Please place the letter of that item in the proper place below.)

1. ____ 2. ____ 3. ____

30. Please rate how much each of the following factors contributed to your decision to ride South Shore TODAY.

		Strongly Contributed	Somewhat Contributed	Not a Contributing Factor		
Please check only one box for each item		5	4	3	2	1
	a. Travel time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b. Ability to relax with less stress	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c. Cost of driving vs. cost of taking train	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d. Concern for the environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e. Ability to better predict arrival time to my destination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f. Downtown parking rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g. Ability to read/work while commuting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31. How strongly do you agree or disagree with the following statements?

Please check only one box for each item	Strongly Agree		Neutral		Strongly Disagree		N/A
	5	4	3	2	1		
a. I board at the South Shore station closest to my home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. I don't take South Shore when I need to be at work early	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. I would prefer more frequent service rather than a faster service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. I would recommend using the South Shore to others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. The cost of gasoline has influenced my decision to use the South Shore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. I would sign up to receive email service alerts for my rail line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. The cost of tolls has influenced my decision to use the South Shore	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

32. Was a motor vehicle available for your trip TODAY?

- Yes
- No

33. If the South Shore had not been available TODAY, how would you have made TODAY's trip?

- Driving or riding in a car
- Taking CTA, Pace or Metra
- Would not have made the trip
- Greyhound or intercity bus
- Uber, Lyft, Via, Other Ride Share service
- Other (specify) _____

34. Do you have a CTA Ventra Card?

- Yes
- No

35. Are you aware of the following? (Please check all that apply.)

- Family Plan - Kids Ride Free (off-peak/weekend)
- Link-Up program
- Buy Online
- \$1 on-board ticket purchase surcharge
- Bikes on Trains
- Quiet Cars
- Train cars are numbered
- AED (Automatic External Defibrillator) on the trains
- South Shore app for Android/iPhone
- South Shore Line Social Media (Facebook/Twitter)
- www.MySouthShoreLine.com

36. Which of the following wireless devices do you have with you on the train? (Please check all that apply.)

- Smart phone
- Laptop with wireless connection
- Tablet
- Other (Please specify): _____
- None

37. How do you receive service alerts?

- South Shore Line Website
- Email
- Text
- App
- Facebook
- Twitter
- Onboard crew
- Other (Please specify) _____

38. Are you...?

- Male
- Female

39. Are you of Hispanic, Latino or Spanish origin?

- Yes
- No

40. What is your race? (Please check all that apply.)

- White/Caucasian
- Black/African American
- American Indian/Alaska Native
- Asian Indian
- Asian/Pacific Islander
- Other Asian
- Other (please specify) _____

41. What language do you usually speak at home?
- English
 - Spanish
 - Other (specify) _____
42. How well do you speak English?
- Very well
 - Well
 - Not Well
 - Not at All
43. What is your age as of your last birthday? (specify)
- _____
44. Including yourself, how many people live in your household for most of the year?
- 1-2
 - 3-4
 - 5-6
 - 7-8
 - 9 or more
45. Including yourself, how many wage earners are there in your household?
- 1
 - 2
 - 3
 - 4 or more
46. What was your household's total 2017 income before taxes?
- Under \$25,000
 - \$25,000 - \$34,999
 - \$35,000 - \$39,999
 - \$40,000 - \$49,999
 - \$50,000 - \$59,999
 - \$60,000 - \$74,999
 - \$75,000 - \$99,999
 - \$100,000 - \$149,999
 - \$150,000 - \$199,999
 - \$200,000 or over

47. What is the highest level of education you completed?
- Grade school or less
 - Some high school
 - Graduated high school
 - Vocational/Technical
 - Some college
 - Graduated college
 - Post-graduate work
48. What is your primary job or position?
- Company officer
 - Manager/Department head
 - Supervisor
 - Administrative/Clerical
 - Professional (MD, lawyer, architect, etc.)
 - Non-Retail Sales
 - Retail
 - Food Service
 - Technical specialist
 - Skilled craftsman/Laborer
 - Student
 - Other (Please specify) _____
 - Currently Unemployed
 - Retired
49. Please provide your email address if you would like to receive messages from the South Shore Line regarding fare programs and promotions:

_____@_____
(Completely confidential, internal use only)

50. Comments?
- _____
- _____
- _____

Thank you very much for your assistance! Your input is valuable to us. Thank you for taking the time to complete this survey, and thank you for riding the South Shore Line.

If returning this questionnaire by mail, please fold and seal with tape. The postage is already paid.

FOR OFFICE USE	
Date:	___ / ___ / 2018
Day:	1 Mo 2 Tu 3 We 4 Th 5 Fr 6 Sa 7 Su
Train Number:	___ Car Number: ___
Interviewer initials:	___

APPENDIX C - STUDY METHODOLOGY

Survey Frame

NICTD's 2018 Systemwide Rider Survey was conducted as a census of passengers on all South Shore Line Railroad trains that were surveyed in Spring 2018. The South Shore Line Railroad serves nineteen (19) stations with trains operating between Millennium Station Chicago and Indiana terminals at Gary Metro Center, Carroll Avenue in Michigan City, or South Bend. The objective of the census was to reach as many passengers as possible by intercept surveys. Since the survey was a census, it was not necessary to construct an elaborate sample frame that would minimize bias in collecting data from a representative sample of trains.

Data Collection

Data collection started on April 3, and most of it was completed by April 21, 2018.

- In only one instance was a make-up run required, and that occurred on April 19, within the survey period. It involved just one car on one train—car 6 on Train 4.
- One weekend train, Number 606, was surveyed on Saturday, April 28.
- With the exception of one day, Friday, April 6, weekday trains scheduled to arrive at or depart from Millennium Station in downtown Chicago before 1:00 PM were surveyed on Tuesdays, Wednesdays and Thursdays.
- Six Saturday trains scheduled to arrive at or depart from Millennium Station before 11:15 AM were also surveyed.
- Excluding the pretest, no train was surveyed more than once.
- Questionnaires were distributed on all cars on all trains.
- No surveying occurred during holidays; there was some overlap with school Spring vacation during the first survey week.

Of the 3,217 questionnaires that were completed and returned, 135 – more than 4% – were completed online, and 94 – about 3% – were mailed back. In 2013, the same proportion, 3%, were returned by mail, while 97%, were completed and returned on the trains.

Distribution and Response Rates

Passenger cooperation was very good. Of the total estimated 5,026 passengers boarding the trains that were surveyed, 4,243 survey forms were distributed and, as noted, 3,217 were completed for a cooperation rate of 64%, compared to 57% in 2013. At 47%, the weekend cooperation rate also exceeded the 2013 weekend rate, 39%, by a substantial margin. The cooperation rate differs from the response rate in that it represents the percent of completed returns as a proportion of total estimated passengers.

The response rate can be calculated in different ways. In 2013 the response rate, representing the number of usable returns as a proportion of surveys distributed, was over 88%. In 2018, the response rate was calculated using a more conservative method, that of showing the number of usable returns as a proportion of passengers encountered. (Passengers encountered equals the number of surveys distributed, plus all refusals.) If the 2013 method is used for the 2018 survey, the response rate is about 76%, while the more conservative 2018 alternate yields a rate of 61%.

The tables below present response rate detail, both by train, and then aggregated.

*2018 South Shore Line Rider Survey
Report to NICTD*

Exhibit C-1. Distribution and Response Rates by Train									
WEEK 1									
Date	Day	Train Number	Estimated Passenger Count	Number of Surveys Distributed	All Refusals	Riders Encountered	Number of Surveys Returned	Cooperation Rate	Response Rate
4/3/2018	Tuesday	7	62	87	13	100	70	113%	70%
4/4/2018	Wednesday	6	297	270	56	326	214	72%	66%
4/5/2018	Thursday	14	344	268	57	325	179	52%	55%
4/6/2018	Friday	9	177	133	69	202	114	64%	56%
TOTAL			880	758	195	953	577	66%	61%
WEEK 2									
Date	Day	Train Number	Estimated Passenger Count	Number of Surveys Distributed	All Refusals	Riders Encountered	Number of Surveys Returned	Cooperation Rate	Response Rate
4/10/2018	Tuesday	102	168	179	75	254	153	60%	60%
4/10/2018	Tuesday	203	11	13	16	29	5	17%	17%
4/10/2018	Tuesday	214	332	376	102	478	275	58%	58%
4/11/2018	Wednesday	104	355	283	86	369	195	55%	53%
4/11/2018	Wednesday	205	3	4	0	4	4	133%	100%
4/12/2018	Thursday	106	280	255	32	287	207	74%	72%
4/12/2018	Thursday	207	20	42	22	64	21	105%	33%
4/12/2018	Thursday	216	82	87	25	112	67	82%	60%
TOTAL			1,251	1,239	358	1,597	927	74%	58%
WEEK 3									
Date	Day	Train Number	Estimated Passenger Count	Number of Surveys Distributed	All Refusals	Riders Encountered	Number of Surveys Returned	Cooperation Rate	Response Rate
4/17/2018	Tuesday	108	513	444	63	507	343	67%	68%
4/18/2018	Wednesday	110	458	461	71	532	351	77%	66%
4/19/2018	Thursday	114	553	466	70	536	378	68%	71%
4/19/2018	Thursday	107	51	32	11	43	24	47%	56%
4/21/2018	Saturday	600	72	51	28	79	43	60%	54%
4/21/2018	Saturday	503	145	90	24	114	66	46%	58%
4/21/2018	Saturday	502	289	120	33	153	101	35%	66%
4/21/2018	Saturday	603	145	36	21	57	29	20%	51%
4/21/2018	Saturday	504	333	184	58	242	142	43%	59%
TOTAL			2,559	1,884	379	2,263	1,477	58%	65%
WEEK 4									
Date	Day	Train Number	Estimated Passenger Count	Number of Surveys Distributed	All Refusals	Riders Encountered	Number of Surveys Returned	Cooperation Rate	Response Rate
4/28/2018	Saturday	606	336	362	136	498	236	70%	47%
TOTAL			336	362	136	498	236	70%	47%
GRAND TOTAL			5,026	4,243	1,068	5,311	3,217	64%	61%

Exhibit C-2. Total Distribution and Response Rates								
	Estimated Passengers	Passengers Encountered	Surveys Distributed	All Refusals	Distribution Rate	Usable Returns	2018 Response Rate Using 2013 Method	2018 Response Rate, Alt Method
Weekday	3,706	4,168	3,400	768	92%	2,600	76%	62%
Weekend	1,320	1,143	843	300	64%	617	73%	54%
Total	5,026	5,311	4,243	1,068	84%	3,217	76%	61%

Notes: 1. See earlier discussion of response rate calculation. 2. Trains 102, 203 and 214 were included in the pretest, and the pretest responses are incorporated into the tallies presented above. This practice makes the number of surveys distributed high relative to the estimated passenger counts.

Procedures to Maximize Response Rate

In order to refine the survey procedures and to test the effectiveness of the questionnaire, a survey pre-test was performed on March 7, 2018 on all open cars of three trains. The first was Train 102 with departure from Carroll Avenue, Michigan City, at 4:03 AM, and arrival at Millennium Station, Chicago at 5:48 AM. It was followed by Train 203, departing Millennium Station at 6:10 AM and arriving at Gary Metro Center at 7:07 AM. The last train to be surveyed in the pre-test was Train 214, with scheduled departure from Gary Metro Center at 7:54 AM and arrival at Millennium Station, Chicago at 8:52 AM.

The pre-test demonstrated that there were no flaws in the survey methodology or the survey questions; the data obtained were usable for the final set. Customers who participated in the pre-test were asked not to complete the similar questionnaire administered during the subsequent survey period.

For the pre-test, 300 questionnaires were prepared for distribution. The planned distribution was proportional to the ridership on each train. In all, 242 questionnaires were distributed; 207 were collected on the trains, 6 were online responses, and 4 were returned by mail, for a total of 217 responses. Access codes for the online responses were provided in the survey instruments that were distributed, and each document had an individual code to assure that there were no duplicate responses. There were 75 refusals, classified as follows: “verbal” refusal when a passenger refuses to take the survey instrument (there were 70 of these); and “physical” refusal when they take it and then hand it back or discard it (there were 5 of these). The pre-test response was excellent—89.6% using the 2013 method, and 68.5% using the more conservative method discussed above.

Based on the fact that there were no problems in administering the survey, and on the excellent passenger cooperation and response rate, there was no need to revise any of the procedures.

Generally, the questionnaire, which was modeled both on those used in Metra’s Rider Surveys and the 2013 South Shore Line Survey, and further refined for current South Shore Line purposes, appeared to be well-understood, with one exception. After a careful review of the individual responses, the consulting team identified a couple of opportunities for clarification.

Questionnaire

The questionnaire used in the survey permits comparisons to selected results of the Metra surveys performed in 2014, but those comparisons are not the focus of this South Shore Line survey. The analysis presented in this survey's final report compares data to the baseline data gathered in the 2013 South Shore Line survey.

The questions were designed to facilitate customer response and to obtain information in three major categories: trip characteristics, customer satisfaction, and demographic characteristics. In all, there were forty-eight (48) primarily multiple-choice questions, with an opportunity for open-ended comments at the end of the survey instrument.

Interviewer Training

Training sessions were held both for the pre-test and for the full survey. For the former, they were held at the offices of The Blackstone Group, and for the latter, at NICTD's headquarters at Dune Park Station in Chesterton, Indiana. (NICTD owns and operates the South Shore Line Railroad.) One advantage of the selected site is its location at a train station, affording the opportunity to familiarize the survey crews with the physical aspects of the operations.

The pre-test training session was held on March 6, 2018 to train The Blackstone Group and People Ready staff members who were conducting the pre-test. (People Ready, an Indiana firm, was subcontracted to provide surveying personnel, both for the pretest and for the main study.) The second session, for a larger group of survey staff, was held on April 2, 2018. Both sessions covered every aspect of data collection, safety, and rules regarding professional behavior. Also, potential on-site problems and appropriate responses were discussed. At the end of the April 2nd training session, interviewers walked to the Dune Park station platform for field orientation which supplemented the "classroom" discussion.

Field Data Collection

Questionnaires were distributed onboard the trains and returned in one of three possible ways: to the field data collection staff; online; or through the mail. To assure maximum exposure, typically one interviewer was assigned to each train car with one supervisor per train.

The interviewing team members were expected to arrive at a terminal at least 15 minutes before train departure time to allow for distribution of materials. If the interviewing team was not able to cover the assignment at the designated survey start time, or if any procedural irregularities could not be resolved immediately, the train was not surveyed that day and the assignment was rescheduled. Rescheduling occurred only on one car of one train.

Interviewers were provided with identification badges to be worn by all personnel engaged in the survey process, as well as verification letters on South Shore Line letterhead which could be presented to both conductors and passengers upon request. In addition, in the training sessions, interviewers were provided with a copy of the training manual which they could carry with them into the field for reference. They were briefed extensively on the purpose of the project, with particular attention to the survey instrument, the assignment sheets and the log. The assignment sheets indicate the train number that the interviewer was scheduled to ride. Interviewers were required to provide their name and identification number, so that any questionable work could be easily traced to the responsible interviewer. They were also required to log additional data including: the number of the train car(s)

worked; the starting and ending questionnaire identification numbers; the actual number of questionnaires distributed; the number of passengers who refused or declined to participate in this survey; the number of hours worked, any parking fees or tolls incurred while traveling to and from assignments; and any noteworthy activity.

Data Analysis

The Blackstone Group entered data from the returned questionnaires and compiled the results, providing tabulations and cross-tabulations.

Selected weighted tables were prepared to compare weighted and unweighted data. Although the survey method essentially incorporated a census of riders and produced high response rates, differences between the two datasets were large enough to require weighted data to analyze the results. Another reason for weighting the data was to eliminate biases that might have occurred because of differences in station distribution rates.

Monthly ridership was used as the weighting target in order to assure that all the trains were in their relative ridership positions across a longer period of time. Of course, more riders use weekday trains than weekend trains.

NICTD provided monthly rider counts for every rush hour train in the system that was surveyed, as well as for the weekend trains. The proportion of passengers carried by each train was calculated using this data. This proportion was used as the numerator in the calculation of the weight. The next step was to calculate the proportion of completes obtained for that train. That proportion became the denominator for the weight calculation. This ratio value generated a weight which put the completes obtained in this survey into proportion of the actual number of monthly passengers carried for each train.

Another feature of the data compilation is the geo-coding of originating trip locations by latitude and longitude. Geo-coding provides further insight into travel patterns, and in the case of the South Shore Line Railroad, shows the extraordinary market reach of its customers.

Data tabulations provide information on the following:

- Day and direction of travel
- Ticket type
- Trip purpose
- Access and egress modes
- Frequency of travel on the South Shore Line
- Length of regular South Shore Line use
- Boarding station
- Destination station
- Education level and profession
- Gender, age, income and ethnicity
- Place of trip origin
- Customer satisfaction

Vlecides-Schroeder Associates then segmented these data into groups and categories to analyze the many market segments of the South Shore Line Railroad's customer base, including usage patterns, satisfaction and preferences.

Recommendations for Future Survey Projects

Pretest. It was very helpful to have a pretest at least two weeks before the actual survey field period. This allowed assessment of the field procedures and review of completed questionnaires, with ample time to make adjustments and refinements. For future studies, a similar pretest is recommended.

Timing of the Survey Administration. The survey was conducted in a time period that is usually considered optimum for a transit system survey, primarily mid-week during Spring. Recognizing that a non-commuting market comprises a significant portion of the South Shore Line's customer base, surveys were also conducted on Saturdays in April. Should resources permit, NICTD may wish, at some point, to survey weekend customers during the peak summer season. Such a targeted survey would expand NICTD's understanding of a market that is significant for the South Shore Railroad.

Conclusion

Overall, the survey was administered with very few problems, achieving an excellent response rate. This result is attributed to the experience of the survey team in constructing the approach, organizing the survey's administration, and training highly qualified survey crews. The team's efforts were enhanced by excellent client cooperation and organization, as well as the enthusiasm of many of the train crews.