I-70 Coalition 2022 Research Final Report

6/27/2022





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Introduction and Methodology

The 2022 Study was based on two separate survey-based programs. Together, the surveys were designed to provide the I-70 Coalition with data to better understand the behaviors, motivations, and preferences of users of the I-70 mountain corridor.

- The I-70 Transit Ridership Survey was distributed via wifi onboard the Bustang and Snowstang lines between February 3rd – May 8th, 2022. The survey resulted in 1,079 responses from Bustang West Line and 129 from the Snowstang line.
- The I-70 Mountain Corridor User Survey was distributed using three different methods: an email list provided by RRC Associates (RRC), a link through social media shared through popular accounts such as @i70things, and a version sent to an E470 database of Mountain Express Lane users.

Key Findings

I-70 Transit Ridership Survey (Onboard) Key Findings

A Profile of Riders

- While a majority of Bustang/Snowstang survey respondents live in Colorado (about two-thirds on both lines), a notable percentage live out of state or are foreign visitors. About 22% and 25% respectively on each line are from other US states, and (15% Bustang and 11% Snowstang) are from a foreign country. The Bustang West Corridor riders are from a wide geographic area including the mountain counties (Eagle, Garfield, Summit and Pitkin), but with particularly strong participation from Denver County, and notable participation from Jefferson and Boulder Counties. Denver and Jefferson Counties were heavily represented on the Snowstang line.
- Riders on both Bustang and Snowstang are headed to a variety of destinations (see Q2 and Q5). Bustang riders report they are disembarking in a variety of locations and of course, the results vary depending upon whether the rider is westbound or eastbound. Bustang riders are relatively likely to report they are "by myself" on the bus (71%), compared to Snowstang riders that are less likely to report they are alone (45%). The likelihood of Snowstang riders reporting that they are with others, usually either friends or family, is notable.
- The age and income profiles of both Bustang and Snowstang riders are similar, with about one in four on both lines under 24 years of age, and the average reported age is about 35 years. About half the riders on both lines report household incomes under \$74,999, but interestingly the profile of respondents from both lines shows about one in ten respondents have incomes between \$150,000 and \$250,000, demonstrating a segment of current riders is relatively affluent. Close to one-third of riders on both lines report they are students (27% and 30% respectively). This is a notable finding that invites specialized targeting in the future.
- The Bustang service was designed to provide mountain residents with transportation to social/medical services on the Front Range. It was interesting to learn that about 44% of Bustang riders report their trip purpose was recreational/tourism indicating that Front Range residents are using Bustang as a way to travel to the mountains for a variety of purposes.
- The reasons riders cited for riding Bustang is typically different than the results from Snowstang riders (see Q14). Bustang riders typically ride because they have no other means of transport (47%), want to save money on gas (27%), or avoid driving in adverse weather (24%). In contrast, Snowstang riders are especially likely to report they ride to "get extra leisure/relaxation time on the bus" (40%) and to avoid adverse driving conditions (34%). In addition, they are

relatively likely to say "prefer someone else drives" (23%) and to "curb my personal CO2 emissions" (20%)." These findings could be useful in directing targeted messaging, and the differences in responses between the lines are noteworthy.

 In a potentially important finding, riders of both Bustang and Snowstang are relatively frequent travelers in the mountain corridor (see Q11 parts I and 2). On average, Bustang riders reported they take an average of six trips in personal vehicles and Snowstang users reported nine trips. On both lines, the reported average number of winter trips on Bustang/Snowstang over the last several years was about 2.6. The data show that users of the lines repeat their use; the data suggest the riders aren't "one-off."

How did riders hear about Bustang and Snowstang respectively, and how best to communicate information?

- A majority of Bustang riders have not heard of Snowstang (60%); there are obvious opportunities to further market the two services.
- While more Bustang riders report they heard about Bustang through "friends and family" (44%) than any other source (see Q12), the ski resorts were the next most identified source. For Snowstang riders, the ski resorts were most identified (30%), followed by online advertisements/social media (29%).
- Ski pass ownership is strong among riders on both lines 64% on Bustang and 58% on Snowstang. Clearly, communicating with recreational travelers in the I-70 corridor via cooperative measures through the resorts and tourism industry represents an opportunity. Additionally, growing the awareness and participation of non-pass holding recreational riders also has the potential for expanding awareness and participation. The segment of respondent without passes, and in some cases that do not participate in snowsports, is relatively likely to include out-of-state and foreign visitors.

Motivators for riding Bustang or Snowstang.

- The top motivators for ridership were the "value for money of the fare" (76% Bustang, 79% Snowstang) see Q18. Snowstang's other most important motivators were the ability to make reservations (76%), room for gear (74%) and the bus being on time (74%). Contrary to some initial assumptions, snowsports rental discounts (45%) and food/beverage vouchers (36%) are relatively low motivators for riding Snowstang according to the survey; however, bathrooms onboard, and lift ticket discounts received higher support as motivators that "would influence my desire to ride."
- The survey asked about where Bustang riders are getting off the bus (see Q5) and, in addition to Denver Union Station for east bound travelers, the most identified locations included Vail (14%), Frisco (14%), and Glenwood Springs (11%). Travel from where the rider disembarks Bustang to get to their final

destination was also probed and results indicate that while riders are most likely to report "riding with friends/family," (41%), local buses (34%) and Uber/Lyft/rideshare are also important modes for the last leg of regional travel. The most identified destinations beyond the stops on the Bustang line were: Breckenridge (58 respondents or 13%), Aspen, Carbondale, Silverthorne, Copper Mountain, Beaver Creek and Keystone. Cooperative efforts with local mountain transportation systems will continue to be important to getting Bustang riders to their ultimate desired destination.

Operational Ratings.

- Riders for both Bustang and Snowstang rated the operational services favorably (over 80% "Good" or "Excellent" on a four-point scale – see Q15). In general, Snowstang ratings were slightly higher than those for Bustang, although the ratings for both services were uniformly positive including particularly high marks for safety (92% positive), and customer service and overall experience (90% plus).
- The positive ratings of the Bustang and Snowstang experience are notable and encouraging. Riders are generally positive and the open-ended comments on the experience further reinforce this message. Comments like: "I love Bustang, awesome drivers, clean buses, very courteous..." and "Thanks for your service" are offered. Additionally, regarding Snowstang, there were also many compliments such as, "I love the Snowstang. I think you all are doing a great job, and I enjoy not having to drive and reducing traffic and emissions." There were also constructive suggestions and some complaints that have been identified and noted.
- When ratings by first-time riders on both services are compared to repeat riders, the first timers are slightly more positive suggesting a strong opportunity for word of mouth messaging and also an indicator of likelihood to return to ride the service they are on in the future.
- The Net Promoter Score (NPS) for Bustang is at 32 compared to a significantly higher score of 54 for Snowstang (see Q17 below). The widely used NPS metric is based on identifying "promoters" and "detractors" using a 0 10 rating scale. The difference between the percent of promoters (9/10s) and detractors (1-6 scores) represents the score. The Bustang/Snowstang results may be seen as relatively positive overall, and the fact that 56% of Bustang respondents, and 72% of riders on Snowstang, said they would be very likely to recommend the services respectively (9/10 on the scale represents a very positive word of mouth). The NPS can be used to measure customer ratings over time, and it also provides a quantitative measure of how riders are rating both Bustang and Snowstang (and eventually Pegasus).

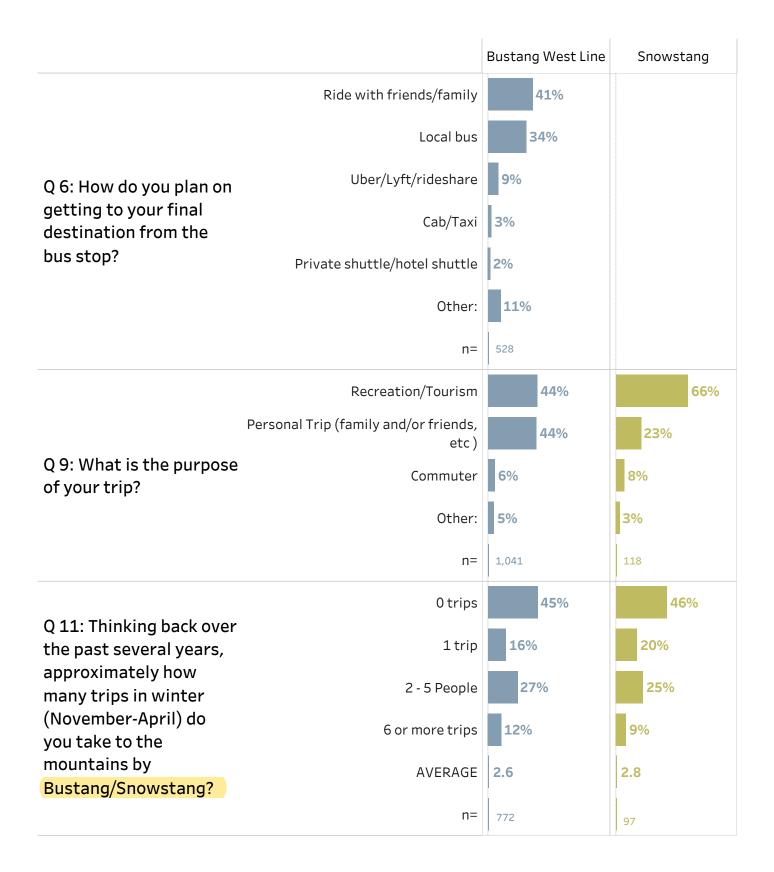
I-70 Transit Ridership Survey Frequency Tables Cross Tabulated by Bus Line

The following tables show the results of the I-70 Transit Ridership Survey. These results are cross tabulated by the bus line that the rider was using at the time of the survey (either Bustang West or Snowstang).

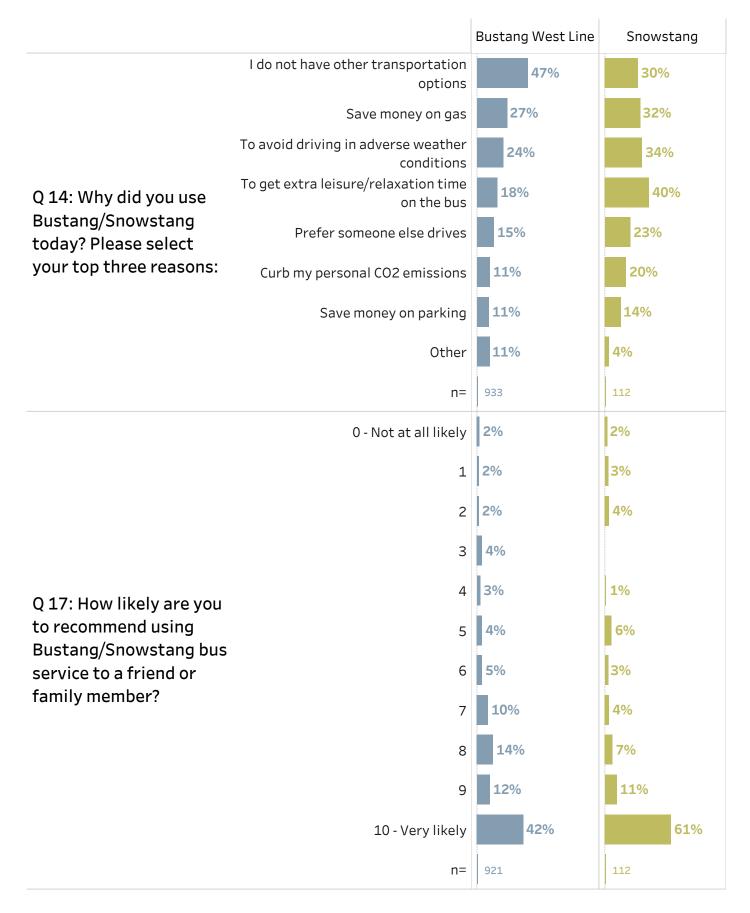


I-70 Transit Ridership Survey Cross Tabulated By "What bus line are you currently riding?"

		Bustang West Line	Snowstang
Q 1: What bus line	Bustang West Line (I-70 Corridor)	100%	
are you currently	Snowstang		100%
riding?	n=	1,079	129
	Arapahoe Basin, CO		29%
	Copper Mountain, CO		21%
Q 2: What is your	Denver, CO		22%
destination?	Loveland Ski Area, CO		19%
	Steamboat Springs, CO		9%
	n=		121
Q 3: Have you	Yes	40%	
heard of	No	60%	
Snowstang?	n=	1,058	
Q 4: Which	Westbound (towards the mountains)	55%	
direction are you	Eastbound (towards Denver)	45%	
traveling?	n=	1,060	
	Denver, CO Union Station	44%	
	Frisco, CO	14%	
	Vail, CO	14%	
	Glenwood Springs, CO	11%	
O Et Whatta atta	Lakewood, CO (Denver Federal Center)	5%	
Q 5: Where are you getting off	Grand Junction, CO	5%	
the bus?	Avon, CO	4%	
	Eagle, CO	2%	
	Idaho Springs, CO	1%	
	Rifle, CO	0%	
	Parachute, CO	0%	
	n=	1,062	



		Bustang West Line	Snowstang
Q 11: Thinking back over	0 trips	26%	24%
the past several years, approximately how	1 trip	15%	9%
many trips in winter	2 - 5 People	35%	23%
(November-April) do you take to the	6 or more trips	23%	44%
mountains by personal/friend's	AVERAGE	5.6	9.4
vehicle?	n=	828	103
	Family/friends	44%	25%
Q 12: How did you first hear about the	Ski resort	26%	30%
	Online advertisement/social media	13%	29%
Bustang/Snowstang	Newspaper article	5%	7%
service you are currently riding?	Google search for transit	2%	2%
	Other:	10%	7%
	n=	1,017	121
	Within the past two weeks	26%	28%
	Two to four weeks ago	9%	13%
Q 13: And do you remember when	One to three months ago	12%	24%
approximately you first heard about Bustang/Snowstang?	Six months to a year ago	9%	7%
	More than a year in the past	33%	20%
	I don't remember	11%	8%
	n=	1,012	119



		Bustang West Line	Snowstang
	Promoter (% responding 9 & 10)	54%	71%
	Passive (% responding 7 & 8)	24%	11%
Q 17: Net Promoter Category / Score	Detractor (% responding 0-6)	22%	18%
	NPS Score	31.6	53.6
	n=	921	112
	Yes	27%	30%
Q 91: Are you a student?	No	73%	70%
	n=	807	99
	Yes	64%	80%
Q 92: Do you participate	No	36%	20%
in snowsports?	n=	806	98
	Yes	64%	58%
Q 93: Do you own a ski pass for 2021/22?	No	36%	42%
	n=	508	78
	Epic	71%	27%
	Ikon	18%	53%
0.04; Which ang(c)?	Mountain Collective	2%	2%
Q 94: Which one(s)?	Rocky Mountain Super Pass	2%	
	Other	18%	24%
	n=	323	45
O OF: Who is on the hus	I'm by myself	71%	45%
Q 95: Who is on the bus with you today?	I'm with others	29%	55%
with you today:	n=	808	99
	Friends	47%	40%
	Family	44%	53%
Q 96: Who are you with?	Both friends and family	4%	8%
	Other:	5%	
	n=	236	53

		Bustang West Line	Snowstang
	Under \$25,000	21%	13%
	\$25,000-49,999	16%	11%
Q 97: Which of these	\$50,000-74,999	13%	20%
categories best	\$75,000-99,999	11%	8%
describes the total	\$100,000-149,999	12%	18%
gross annual income of	\$150,000-199,999	6%	8%
your household (before	\$200,000-249,999	3%	5%
taxes)?	\$250,000 or more	6%	4%
	Prefer not to respond	12%	13%
	n=	787	96
	Under 18	1%	4%
	18 - 24	26%	21%
	25 - 34	34%	29%
	35 - 44	17%	20%
Q 98: Age of respondent	45 - 54	9%	21%
Q 98. Age of respondent	55 - 64	6%	4%
	65 - 74	6%	
	75 or older	1%	
	AVERAGE	35.1	34.6
	n=	758	95
	Eagle	17%	5%
	Denver	10%	22%
	Garfield	8%	1%
	Summit	7%	4%
	Pitkin	4%	1%
Q 99: Home Location	Jefferson	3%	11%
(County)	Boulder	3%	4%
	Mesa	3%	1%
	Adams	1%	4%
	El Paso	1%	5%
	Other	40%	40%
	n=	939	110

Source: RRC Associates

I-70 Transit Ridership Survey

Q 15: Please rate the overall quality of Bustang/Snowstang's operational service (i.e., timeliness, frequency, safety, customer service). By "What bus line are you currently riding?"

						Percent F	Responding:
Rating Category	Sample	Avg.	n=	Good	l/Excellent (4 & 3)		Poor/Fair (2 & 1)
Safaty	Bustang West Line	3.4	632	49%	43%	92%	7% 8%
Safety	Snowstang	3.5	75	59%	359	% 93%	5% 7%
Customer Service	Bustang West Line	3.4	631	50%	39%	90%	8% 10%
Customer service	Snowstang	3.5	75	59%	36	% 95%	5%
Querall Experience	Bustang West Line	3.3	611	46%	45%	91%	6% 9%
Overall Experience	Snowstang	3.5	75	56%	409	% 96%	4%
Timeliness	Bustang West Line	3.3	632	48%	38%	86%	11% 14%
Timemiess	Snowstang	3.4	74	57%	32%	89%	7% 11%
	Bustang West Line	3.1	632	36%	44%	80%	15% 5% <mark>20%</mark>
Frequency	Snowstang	3.3	75	48%	39%	87%	12% 13%

*Ratings categories are sorted in descending order by that average rating Source: RRC Associates



Q 18: How would the following aspects motivate you to take Bustang/Snowstang today or in the future? Showing Only Bustang Responses

			Percent Responding:				
Rating Category	Avg.	n=	Would strongly impa	act my decision (5 & 4)	Neutral (3)	Would not impact my decision (2 & 1)	
The value for money of the fare	4.2	597	56%	20% 76%	15%	10%	
The bus being on time	4.1	599	54%	21% <mark>75%</mark>	15%	10%	
Wifi/USB ports/Power outlets	4.1	598	48%	27% 75%	14%	11%	
Frequent service during weekends	4.0	590	52%	21% 73%	14%	7% 13%	
Connectivity to other transportation services (light rail, bus, etc.)	4.0	580	54%	18% 72%	14%	10% 14%	
Frequent service during weekdays	3.9	581	47%	19% 66%	18%	10% 16%	
Room for gear	3.8	599	41%	24% 65%	17%	8% 10% 18%	
Comfortable, reclining seats	3.7	608	36%	28% 64%	19%	7% 10% 17%	
Bathrooms onboard	3.7	595	39%	21% 60%	21%	13% 19%	

*Ratings categories are sorted in descending order by that average rating Source: RRC Associates

1 - Would not impact my decision to ride

2

3
4
5 - Would strongly impact my decision to ride

Q 18: How would the following aspects motivate you to take Bustang/Snowstang today or in the future? Showing Only Snowstang Responses

		Percent Responding:				
Rating Category	Avg. n=	Would strongly impact my decision (5 & 4)	Neutral (3)	Would not impact my decision (2 & 1)		
The value for money of the fare	4.2 75	60% 19% <mark>79%</mark>	12%	8% 9%		
Room for gear	4.2 78	59% 15% 74%	15%	10%		
The bus being on time	4.1 78	51% 23% 74%	14%	^{6%} 12%		
Ability to make reservations	4.1 74	46% 30% 76%	14%	11%		
Wifi/USB ports/Power outlets	3.9 77	38% 31% 69%	19%	12%		
Comfortable, reclining seats	3.7 78	31% 29% <mark>60%</mark>	23%	9% 8% 17%		
Bathrooms onboard	3.6 76	47% 17% 64%	8%	8% 20% <mark>28%</mark>		
Lift ticket discounts	3.6 75	39% 21% 60%	20%	16% 20%		
Food and beverage vouchers	3.0 75	24% 12% 36%	29%	9% 25% 35%		
Snowsports rental discounts	2.9 74	23% 22% 45%	14%	36% 42%		

*Ratings categories are sorted in descending order by that average rating Source: RRC Associates

1 - Would not impact my decision to ride
2
3
4
5 - Would strongly impact my decision to ride

I-70 Mountain Corridor User Survey (Online) Key Findings

A Profile of Corridor Users

- The I-70 Corridor User Survey was designed to obtain information from Colorado residents (primarily Front Range) that use the I-70 mountain corridor. The sample included over 3,200 responses from a broad sampling of geographic locales (see Q99) including many counties: Denver (35%), Jefferson (23%), Boulder (10%) and Douglas (9%).
- Respondents were generally representative of active recreation users. The sampling was designed to include snowsports enthusiasts (86%), age groups that represented typical participants: 26% under 34 years, 13% over 65, and an average age of 46 years. The income profile of respondents was relatively affluent, consistent with the overall profile of winter sports users (20% under \$100,000, but with 24% over \$250,000). In other words, the sample captured in this survey represents the active recreational user that is traveling the I-70 mountain corridor during the winter months.

Familiarity with Bustang and Snowstang

- About 60% of respondents have heard about Bustang. In contrast, only 31% had heard of Snowstang. About 4% of respondents had ridden Bustang with an average of 2.2 trips among those that had ridden. Only 2% of respondents had ridden Snowstang, with an average of 1.6 trips.
- Respondents that had heard about Bustang provided reasons why they had not used the service (see Q7). The most identified reason was "prefer my own vehicle," followed by "need a vehicle at my destination" and "current transportation meets my needs."
- Interestingly, the stated reasons for not using Snowstang are generally similar to those reported for Bustang. "I prefer my own vehicle" is most identified, but "need a vehicle at my destination" is relatively less important for people responding about not using Snowstang since the Snowstang rider destinations are the ski areas.
- Among those that had heard about Snowstang (Q11), they were most likely to have "seen a bus on the highway" (29%) a notable finding that shows the visibility of the buses works! This was followed by "online advertisement/social media" (26%) and newspaper articles (14%). The percentage of respondents that say they first heard about Snowstang from a ski resort is low only 4%. This could be due to the fact that Vail Resort ski areas don't utilize the Snowstang service and therefore don't promote it. (57% of survey respondents are Epic Pass holders).

I-70 Avoidance Strategies

- Respondents make an effort to avoid the high congestion times on I-70 (Q20 and Q21), and they use a variety of efforts (or strategies) for avoidance. Overall, 92% say they make an effort to avoid high congestion times.
- The most identified congestion avoidance efforts include arriving early at the resort (62%) or leaving early (54%). Staying overnight (46%), avoiding weekend travel (37%) and avoiding Saturdays (37%) were next most cited. The results on these questions might provide further guidance for both Bustang and Snowstang marketing as the routes/schedules and promotions are evaluated.
- The use of The Dinosaur/Morrison lots for carpooling is high among survey respondents, 35% of respondents (977 persons) reported that they had used the lots for carpooling either "this season (2021/22) or last". The data suggest that the lots are an important piece of an overall strategy to provide for carpooling to reduce congestion.

Expressed Interest in Bustang and Snowstang

• One purpose of the survey was to identify the profile of candidates that might be interested in Bustang or Snowstang. Results show that while a majority of respondents stated they were not interested in Bustang or Snowstang (66% and 62% respectively), there's still a group of respondents "interested/extremely interested" in both services (370 people expressed strong interest in Bustang and even more (398 respondents) rated showed strong interest in Snowstang. (see Q6 and Q12).

Motivators to Ride Bustang/Snowstang

The motivators for Bustang/Snowstang included: more pickup/drop-off locations (64%), more frequent services (59%) and ability to make reservations (56%) at the top of the list (see Q26). Similar to the results from the I-70 Transit Ridership Survey, food and beverage vouchers (30%) and snowsports rental discounts (15%) made up the bottom of the motivators list.

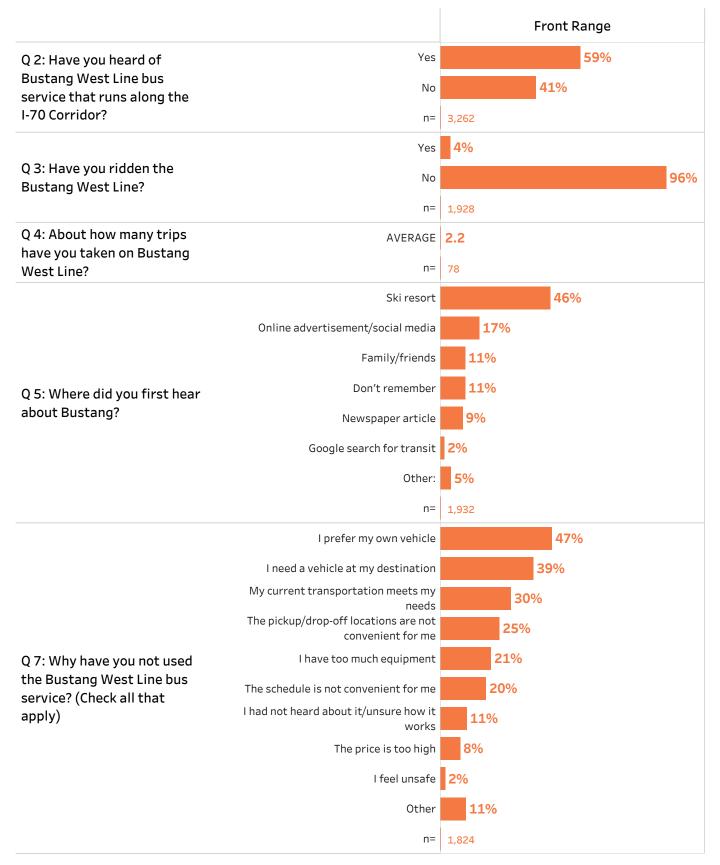
Communications Regarding Motivators to Ride Bustang/Snowstang

 When asked how best to communicate about bus services in the I-70 mountain corridor (Q25), respondents stated that ski resorts would be the best way (26%). News/media was the second ranked choice (21%). Resorts stand out as an extremely important information source and communication vehicle on for Bustang/Snowstang. **I-70 Mountain Corridor User Survey Frequency Tables**

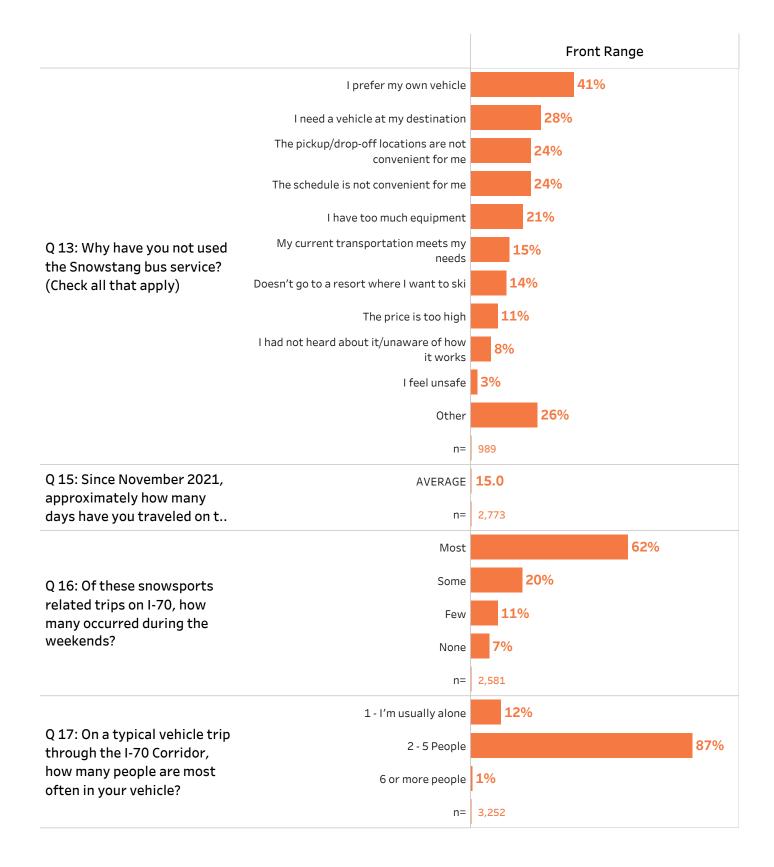
The following tables show the results of the I-70 Mountain Corridor User Survey. These tables only include those respondents who live in the Front Range region.

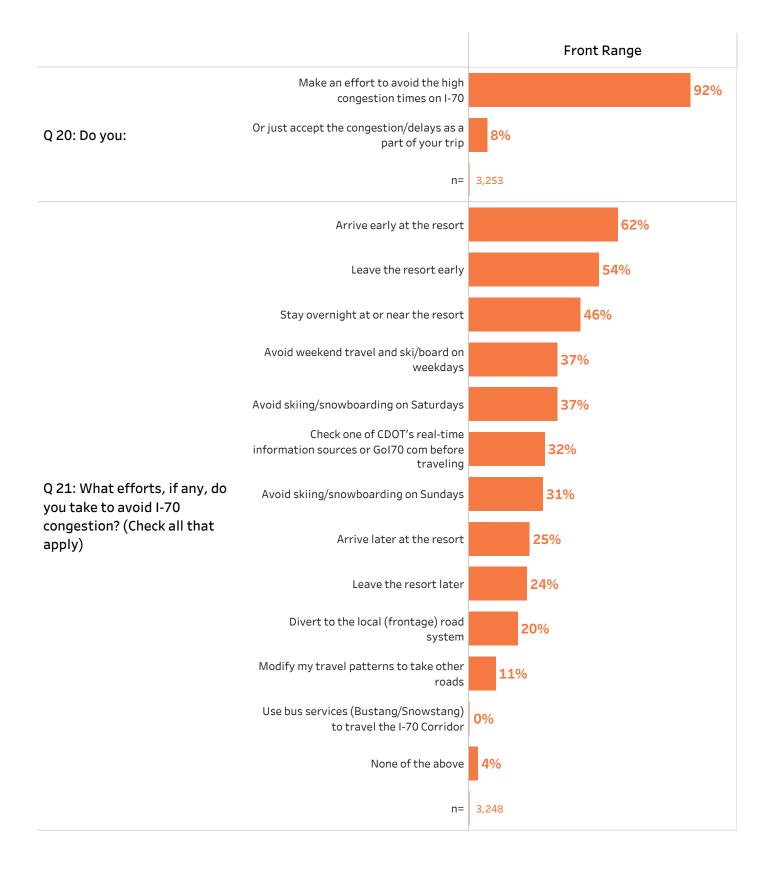


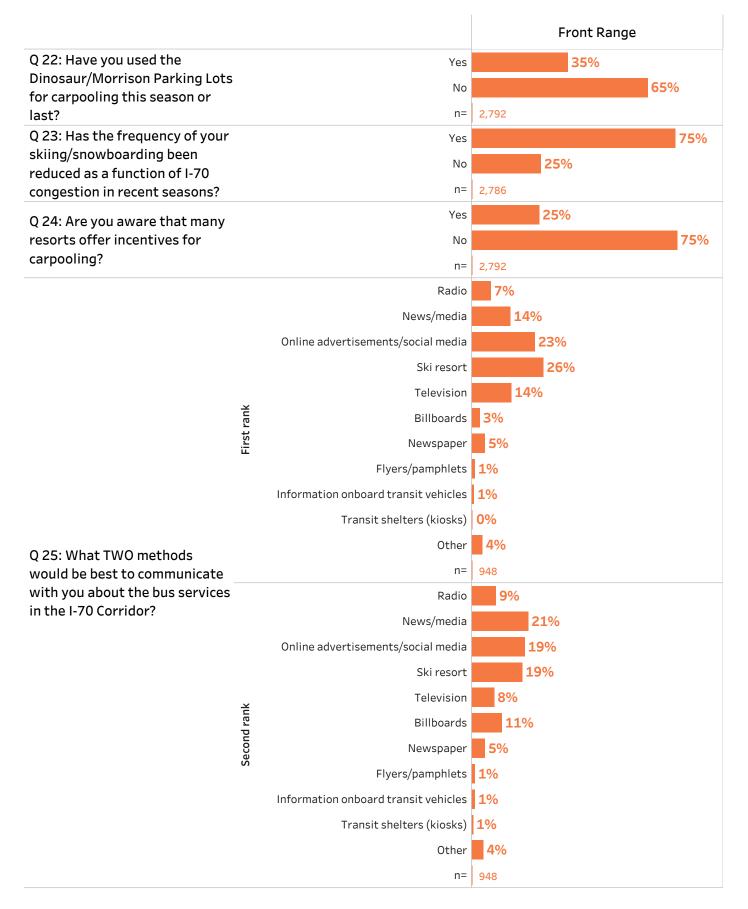
Cross Tabulated By "Colorado Front Range"



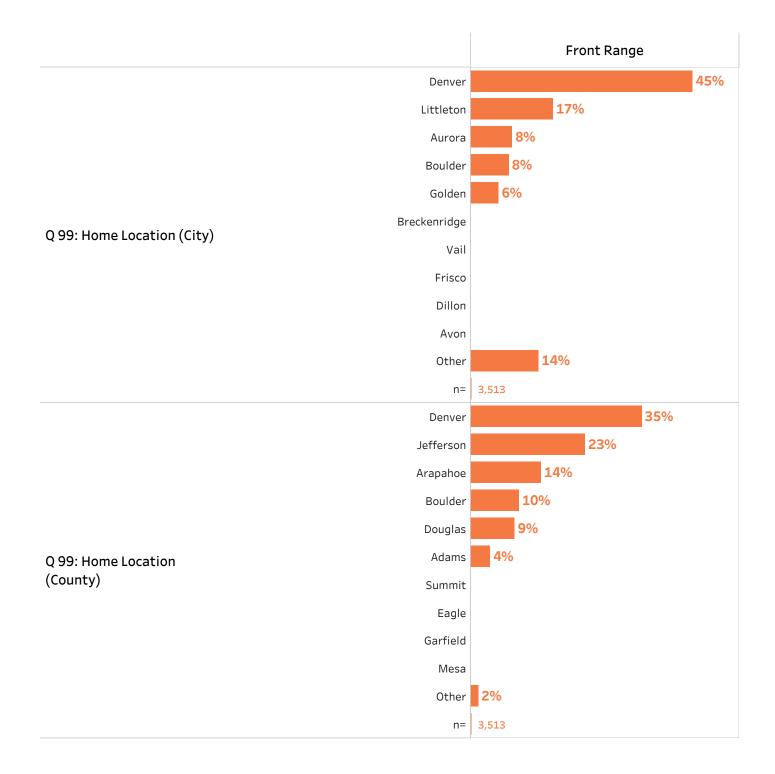
		Front Range
	Yes	31%
Q 8: Have you heard of Snowstang?	No	69%
_	n=	3,258
	Yes	2%
Q 9: Have you ridden Snowstang?	No	98%
	n=	1,015
Q 10: About how many trips have you taken on	AVERAGE	1.6
Snowstang?	n=	18
	I saw a bus on the highway	29%
	Online advertisement/social media	26%
	Newspaper article	14%
	Don't remember	11%
Q 11: Where did you first hear about Snowstang?	Family/friends	9%
	Ski resort (which one?):	4%
	Google search for transit	2%
	Other:	5%
	n=	1,016







		Front Range
	Yes	5%
Q 91: Are you a student?	No	95%
	n=	2,761
	Yes	86%
Q 92: Do you participate in	No	14%
snowsports?	n=	3,257
	Yes	79%
Q 93: Do you own a ski pass	No	21%
for 2021/22?	n=	2,789
	Epic	57%
	Ikon	44%
	Mountain Collective	1%
Q 94: Which one(s)?	Rocky Mountain Super Pass	1%
	Max Pass	0%
	Other	14%
	n=	2,200
	Under \$25,000	1%
	\$25,000-49,999	3%
	\$50,000-74,999	7%
Q 97: Which of these	\$75,000-99,999	9%
categories best describes the	\$100,000-149,999	18%
total gross annual income of your household (before	\$150,000-199,999	14%
taxes)?	\$200,000-249,999	11%
,	\$250,000 or more	24%
	Prefer not to respond	13%
	n=	2,725
	Under 18	0%
	18 - 24	3%
	25 - 34	23%
	35 - 44	22%
0.98: Ago of respondent	45 - 54	23%
Q 98: Age of respondent	55 - 64	17%
	65 - 74	10%
	75 or older	3%
	AVERAGE	46.2
	n=	2,683



Q 6: Bustang is a bus services that travels along selected corridors in Colorado including the I-70 mountain corridor Using the scale below, how interested would you be in using this service?

By "Colorado Front Range"

		Percent Responding:				
Sample	Avg. n=	Extremely interested (5 & 4)	Neutral (3)	No	ot at all interested (2 & 1)	1
Front Range	2.1 1,302	9% 13%	21%	22%	44%	66%
			*Ratings categories are	sorted in descer	nding order by that av	verage rating

Ratings categories are sorted in descending order by that average rating* Source: RRC Associates

I-70 Mountain Corridor User Survey

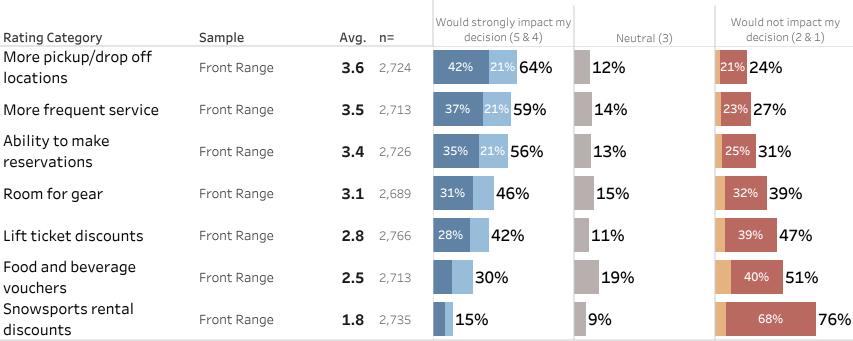
Q 12: Snowstang is a bus service that travels directly from Denver to various Colorado resorts in winter and that is designed particularly for snowsports' enthusiasts. These services are currently available to Loveland Ski Area, Arapahoe Basin, Copper Mountain and Steamboat on selected days

Using the scale below, how interested would you be in using this service?

By "Colorado Front Range"

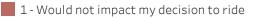
			Percent Responding:			
Sample	Avg. n=	Extremely interested (5 & 4)	Neutral (3)		Not at all interested (2 & 1	L)
Front Range	2.2 2,212	7% 12% 18%	20%	19%	43%	62%
1 - Not at all int	terested		*Ratings categ	gories are sorted in des	cending order by that a Source: R	average rating RC Associates
2						
3						
4						
5 - Extremely ir	nterested		27 of 28			

Q 26: How would the following aspects motivate you to take Bustang/Snowstang today or in the future? By "Colorado Front Range"



Percent Responding:

*Ratings categories are sorted in descending order by that average rating Source: RRC Associates



2

3

5 - Would strongly impact my decision to ride