

**access**

Report of Findings

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# 2025 Passenger Technology Study

01 May 2025

Confidential & Proprietary



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(Provided Separately)



access



# Project Overview



## Research Objectives

- GreatBlue Research was commissioned by Access Services (hereinafter "Access") to conduct market research to understand their riders' current access to technology and desire for Access to make technological advancements in the future.
- The primary goals for this research study were to assess Access riders' usage and satisfaction with several existing applications and online services Access offers, current internet and technology usage, familiarity, and interest in potential technology advancements at Access.
- The outcome of this research will enable Access to a) more clearly understand the current technology access of its riders, b) discern satisfaction with existing mobile and web-based offerings, and c) gauge interest in Access implementing new technology offerings to its riders.

## Areas of Investigation

Access Services leveraged a quantitative research methodology to address the following areas of investigation:

- Current access to the internet and mobile devices
- Use of "assistive technology"
- Comfort level and interest in boarding an autonomous vehicle (AV)
- Interest and anticipated use of mobile ticketing options
- "Where's My Ride" mobile application usage and satisfaction
- Usage habits and satisfaction with Access's online booking feature
- Usage habits and ease of navigating Access's website
- Preferred method of receiving information from Access
- Demographic profile of respondents





# Research Methodology Snapshot



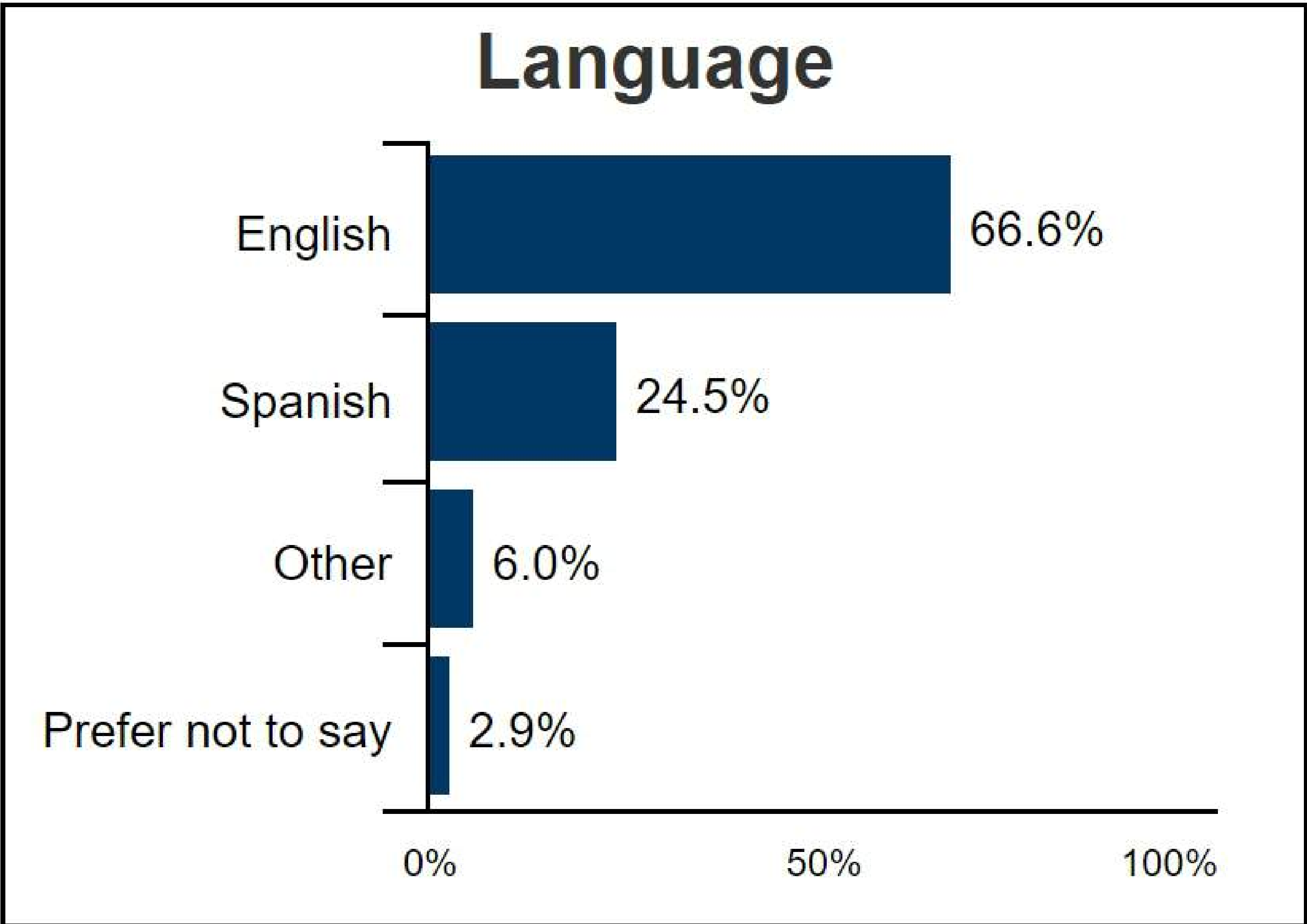
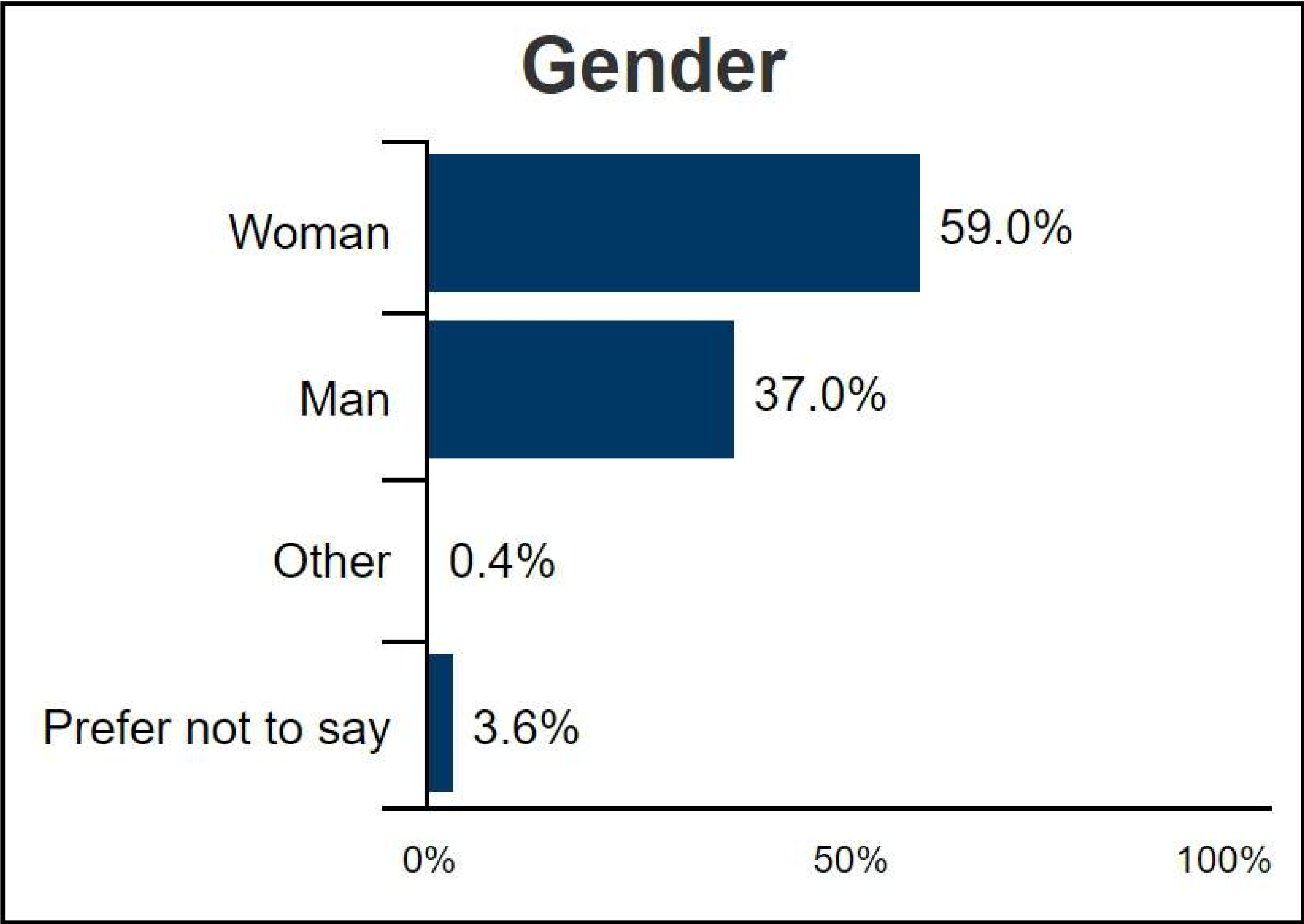
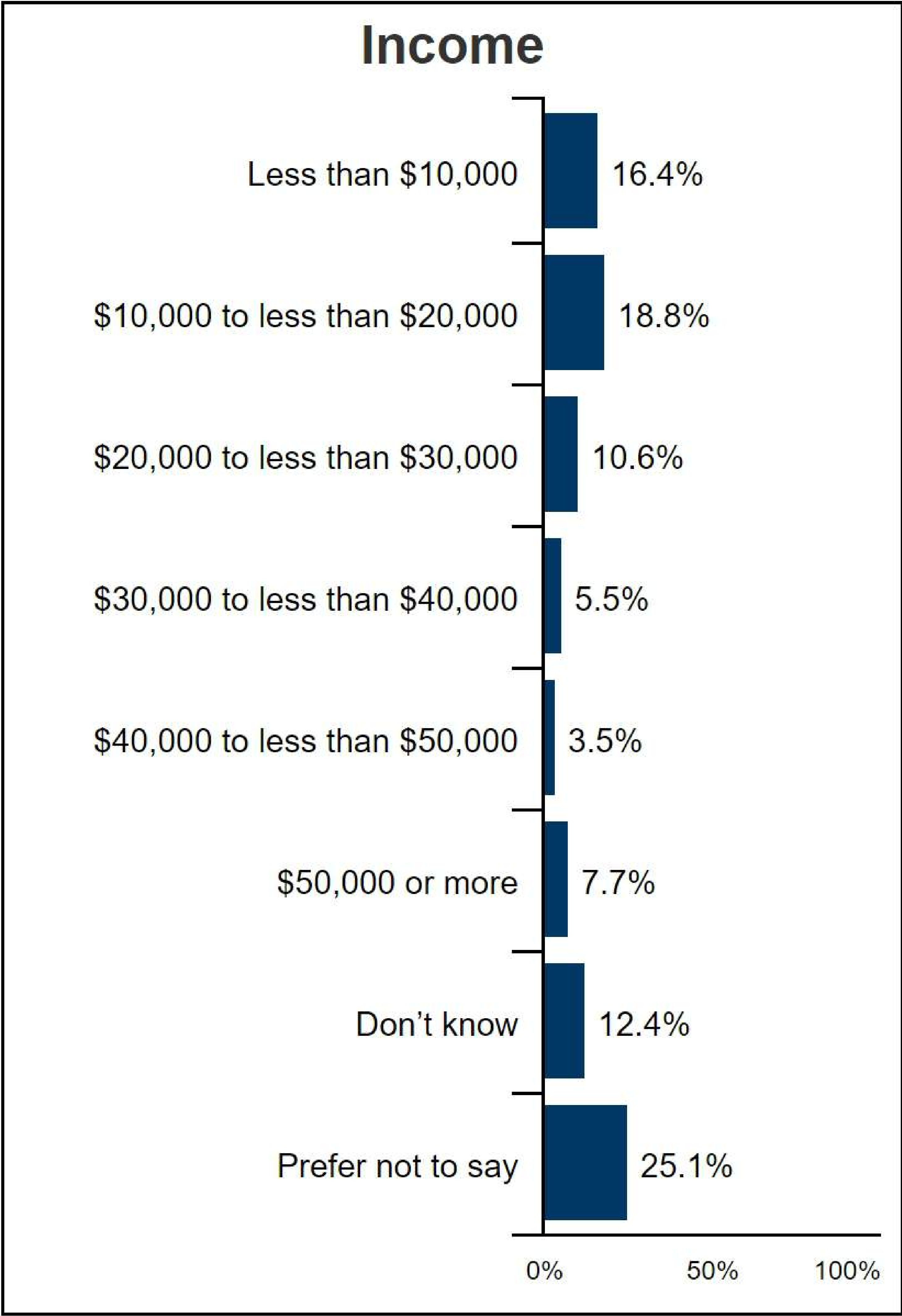
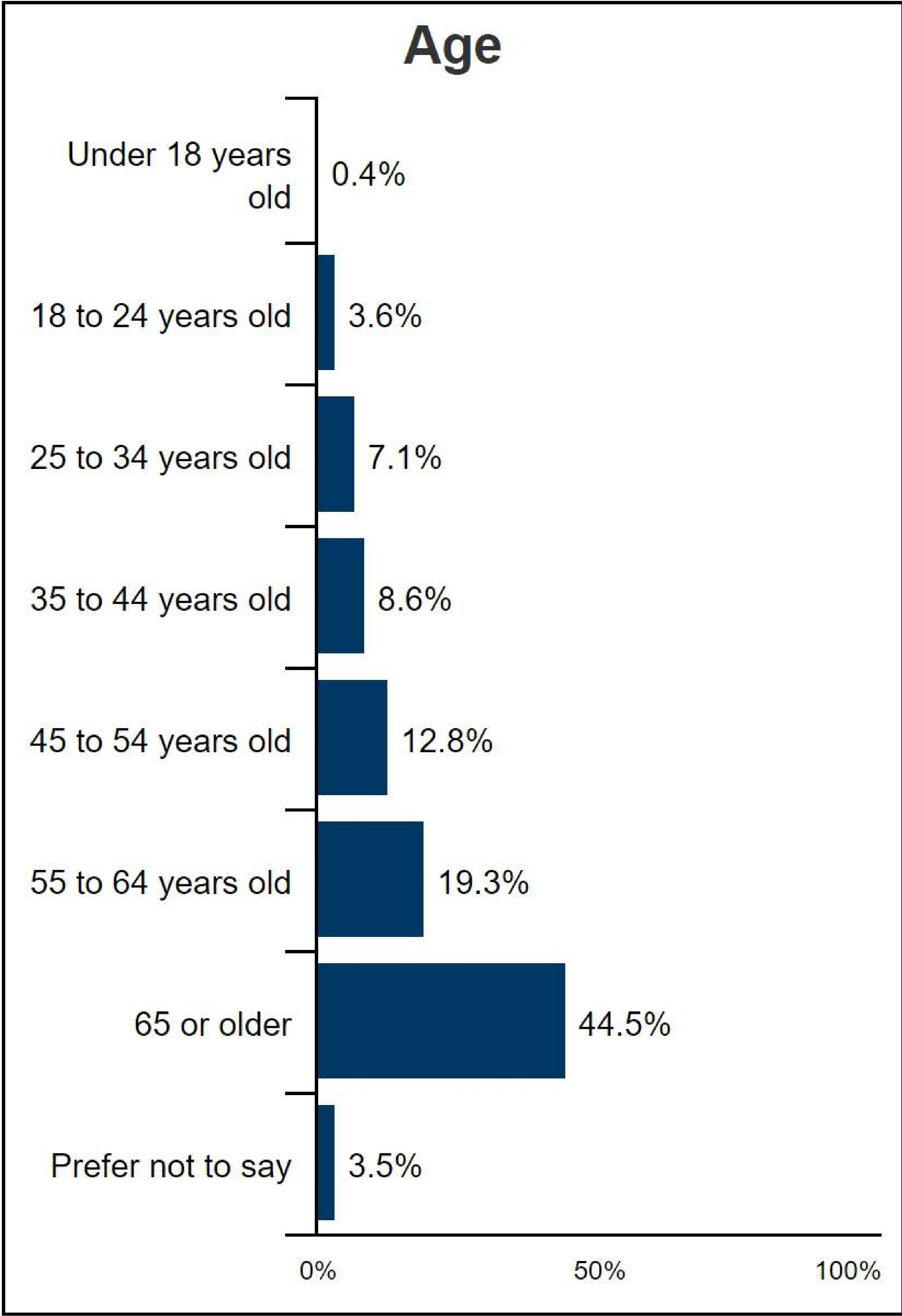
<div>Methodology</div> <div>Telephone &amp; Digital</div>	<div>No. of Completes</div> <div>1,261 (301 phone + 960 digital)</div>	<div>No. of Questions</div> <div>39*</div>	<div>Incentive</div> <div>None</div>	<div>Sample</div> <div>Customer List</div>
<div>Target</div> <div>Access Customers</div>	<div>Quality Assurance</div> <div>Dual-level**</div>	<div>Margin of Error</div> <div>+/- 2.7%</div>	<div>Confidence Level</div> <div>95%</div>	<div>Research Dates</div> <div>February 25 - April 7, 2025</div>

\* This represents the total possible number of questions; not all respondents will answer all questions based on skip patterns and other instrument bias.

\*\* Supervisory and data quality personnel, in addition to a computer-aided interviewing platform, ensure the integrity of the data is accurate.



# Respondent Profile | Demographics

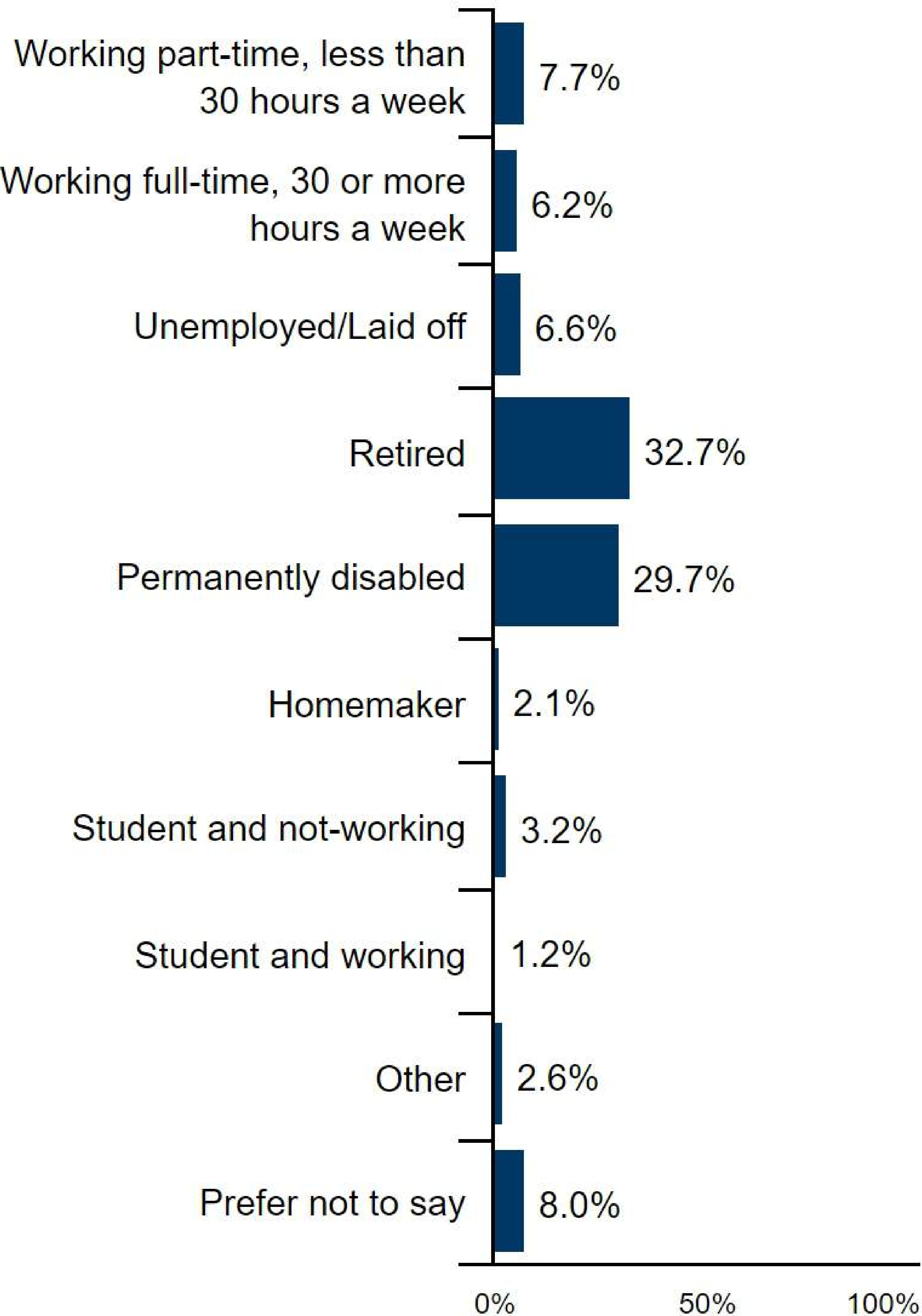




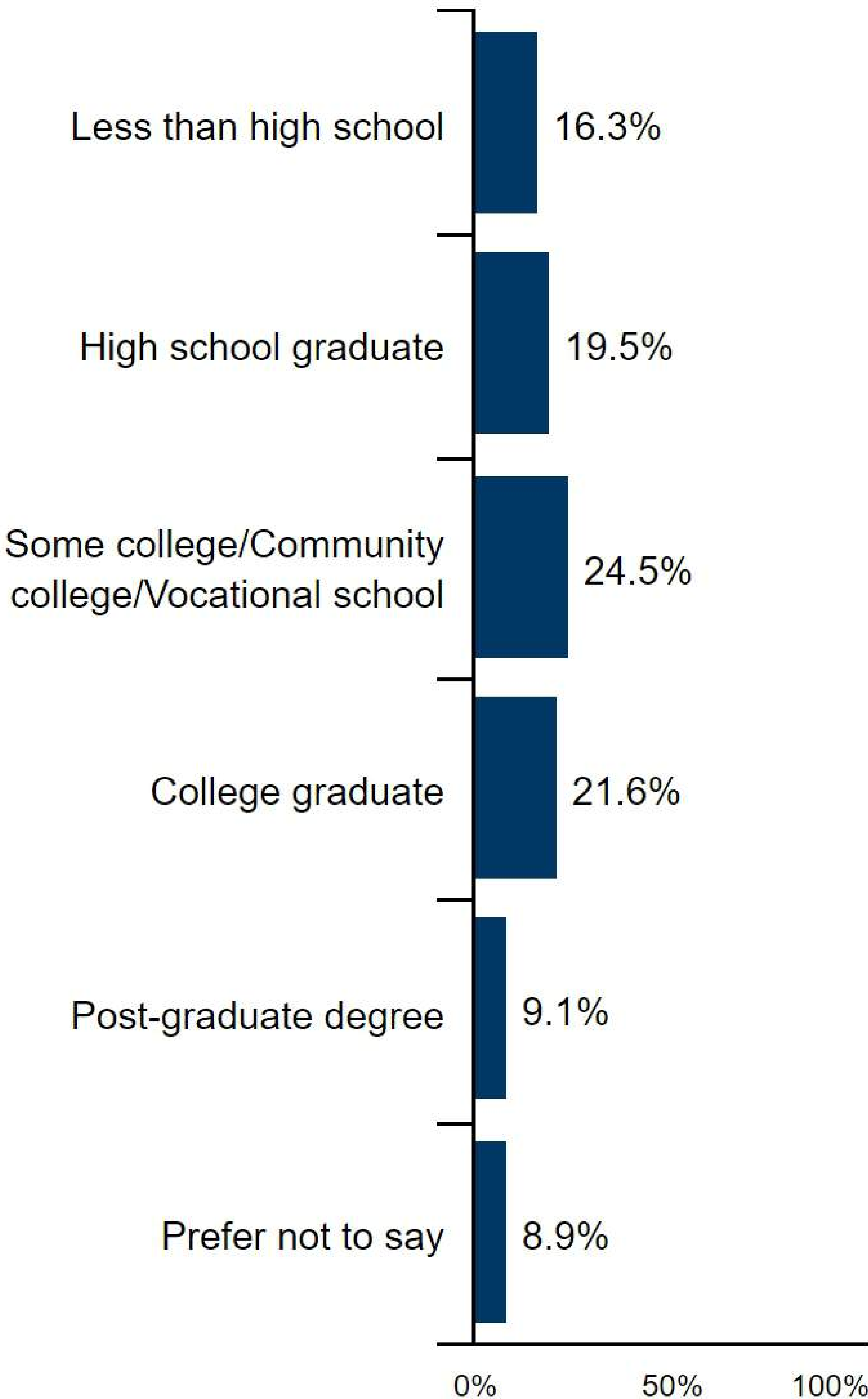
# Respondent Profile | Demographics



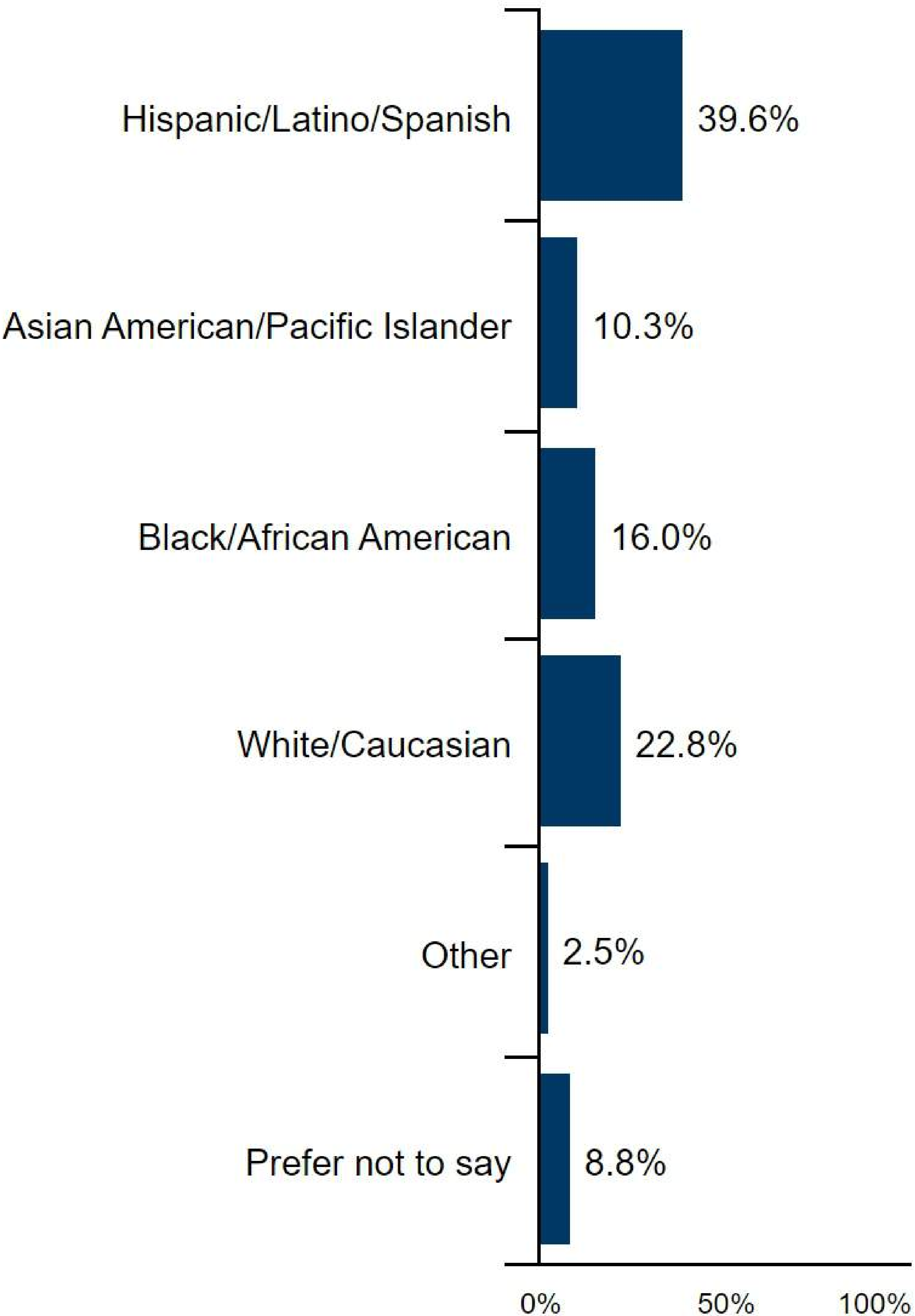
## Employment Status



## Education

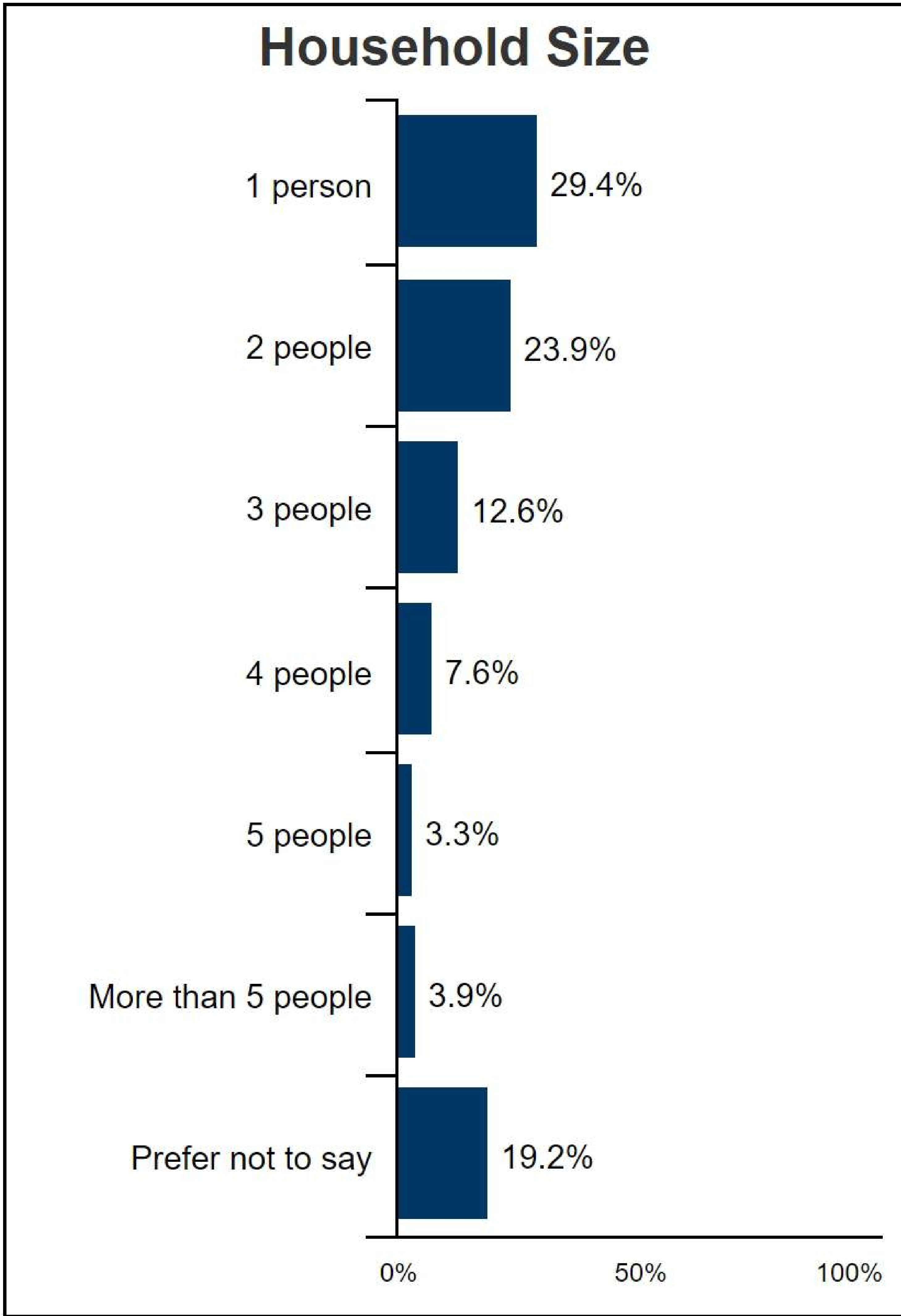
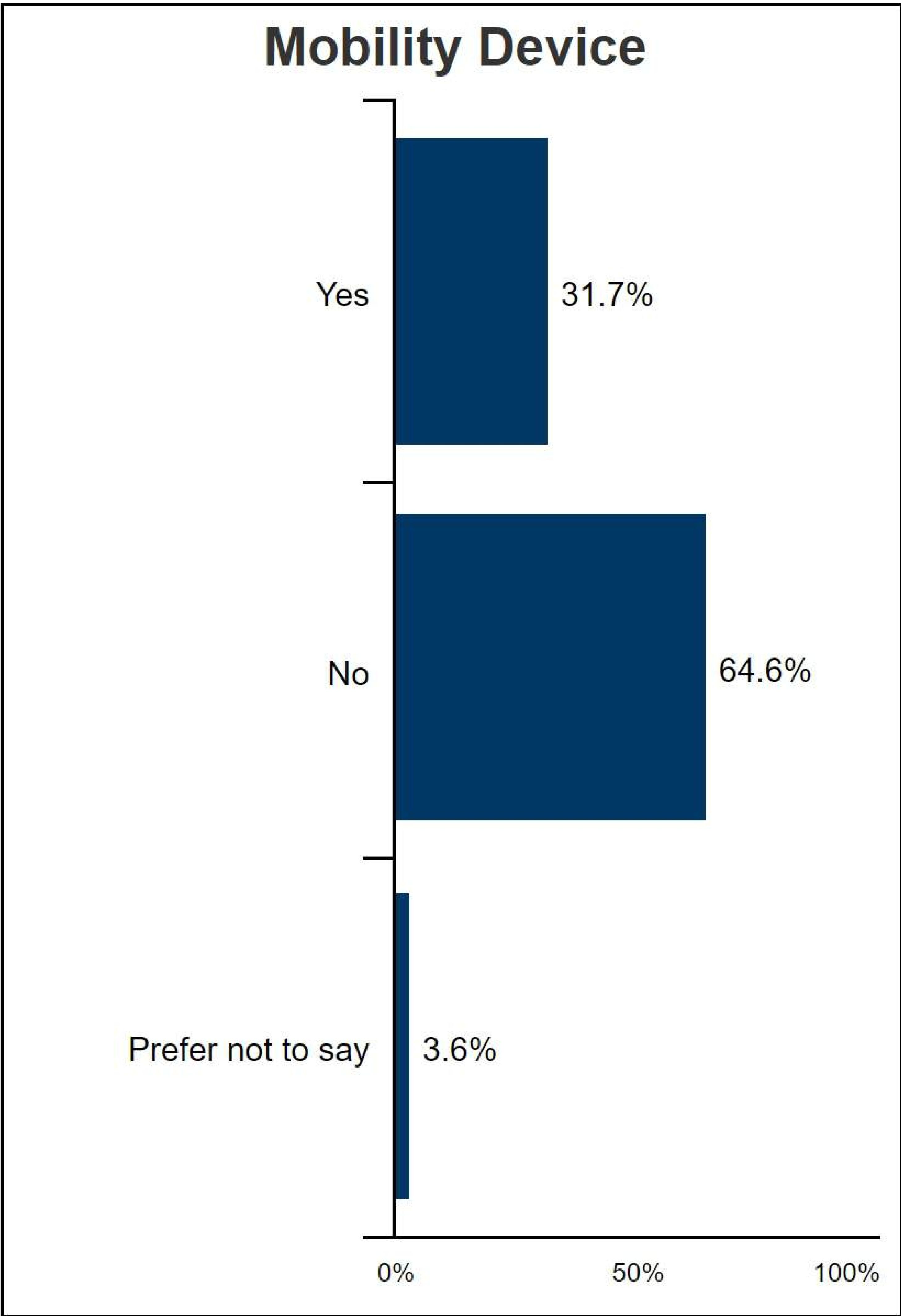
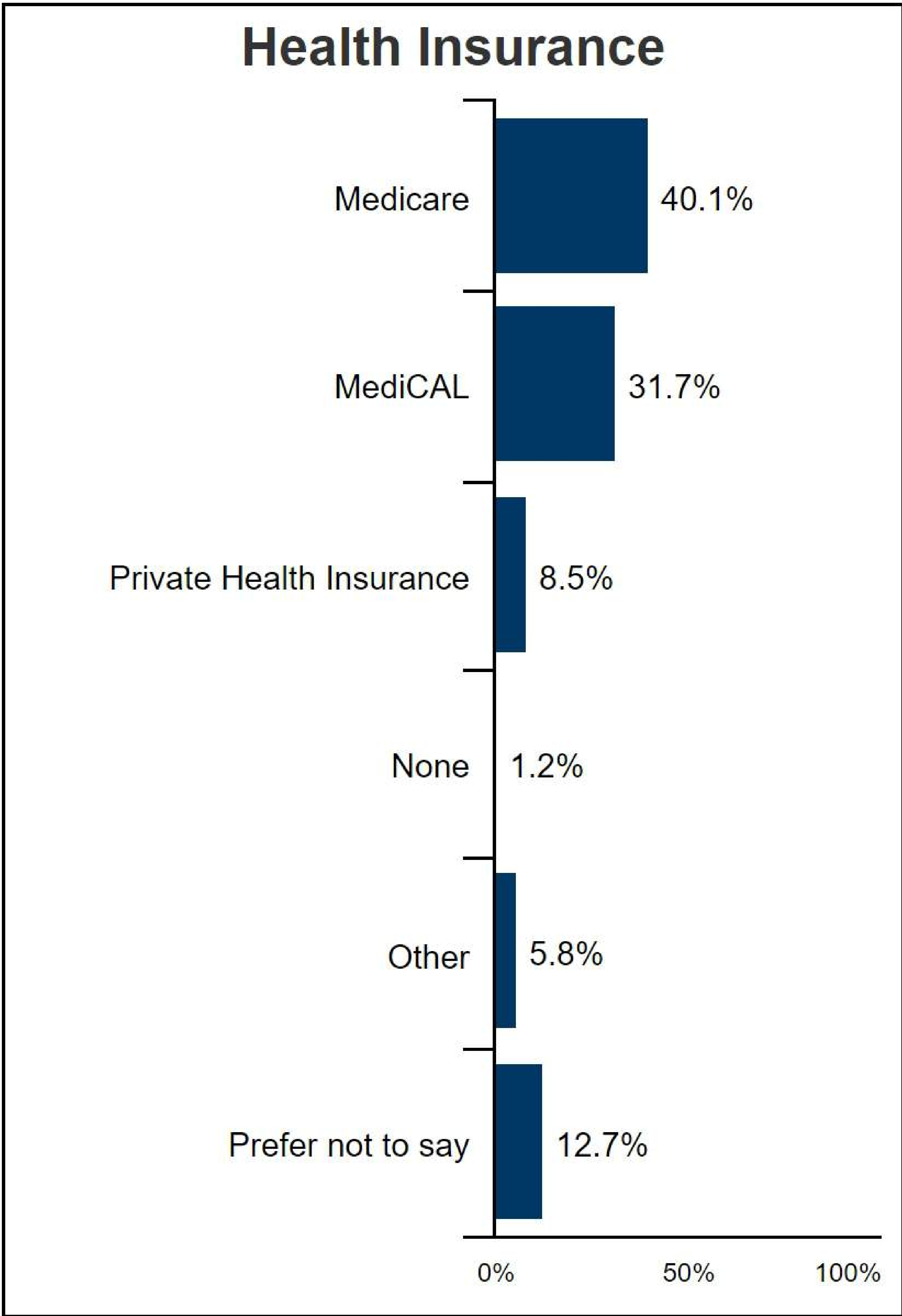


## Ethnicity



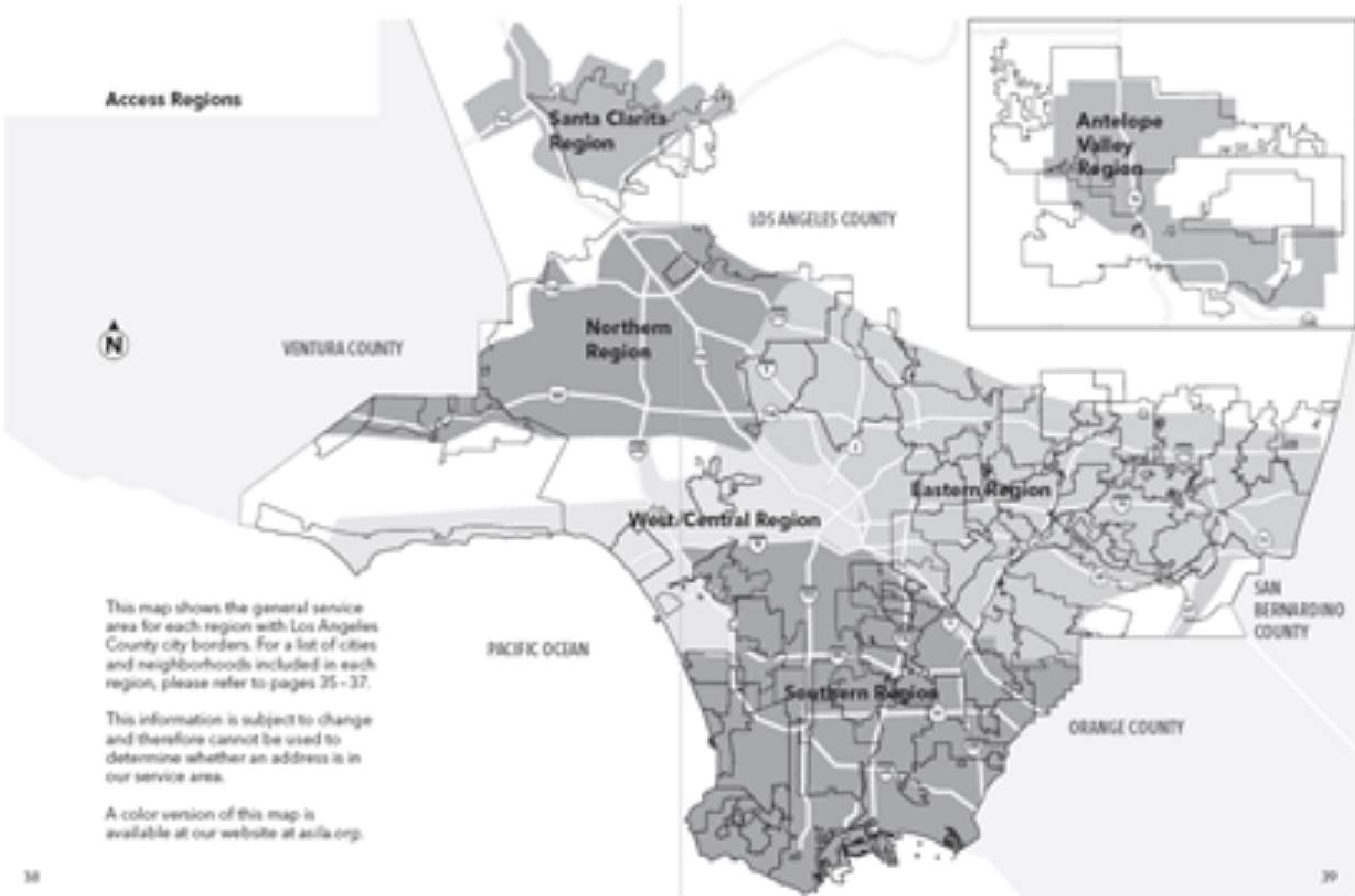


# Respondent Profile | Demographics





# Respondent Profile | Demographics



Region	# of surveys
Antelope Valley	41
Eastern	340
Northern	157
Santa Clarita	12
Southern	428
West/Central	283
Total	1,261



# Key Study Findings



# Key Study Findings



## Future Services and Emerging Technology

- Over one-third of respondents (37.1%) reported being either "very" or "somewhat familiar" with autonomous vehicles, while the same proportion (37.1%) reported being "not at all familiar."
- Two-fifths of respondents (40.9%) were willing to participate in a focus group to assist Access Services in developing an accessible autonomous vehicle.
- While over two-fifths of respondents (43.6%) were comfortable with using an accessible autonomous vehicle for future rides, this marks a significant decrease compared to 2021 (-6.8 percentage points).
- Similarly, over two-fifths of respondents (45.0%) expressed interest in using an accessible autonomous vehicle in the future, also a significant decrease compared to 2021 (-10.6 percentage points)
- Of the respondents who use a wheelchair, nearly three-fifths (58.7%) were interested in Access Services offering a vehicle that utilized automatic wheelchair securement.
- Over three-fifths of respondents (62.3%) reported interest in Access Services offering a mobile ticketing option to allow pre-payment and remote payment for rides.
- One-half of respondents (50.5%) reported they would utilize mobile ticketing options for either "all" or "most trips."

## Mobile App, Online Booking, and Digital Tools

- Nearly three-fifths of respondents (59.2%) reported previously using the *Where's My Ride* mobile app, a significant increase compared to 2021 (+13.4 percentage points).
- Over eight-out-of-ten respondents (84.5%) were satisfied with their experience using the *Where's My Ride* mobile app.
- Over two-fifths of respondents (44.8%) are currently utilizing online booking through Access Services, also a significant increase compared to 2021 (+23.0 percentage points).
- Among respondents who use the online booking platform, nine-out-of-ten respondents (90.2%) reported being either "very" or "somewhat satisfied," with over one-half of respondents (55.1%) being "very satisfied."

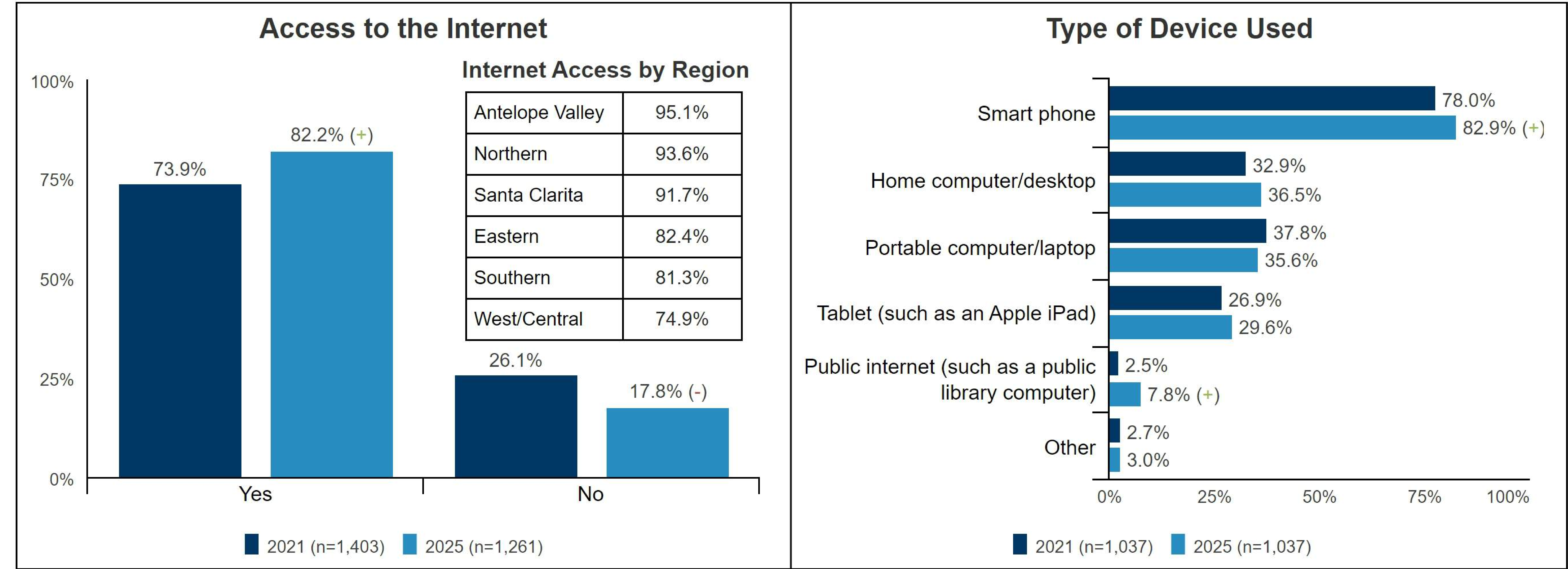
## Technology Access and Internet Use

- Nearly one-half of respondents (45.6%) reported previously using the Access Services website, a significant increase compared to 2021 (+17.2 percentage points).
- Over three-quarters of respondents (77.4%) who use the Access Services website reported that it was either "very" or "somewhat easy" to use.
- Over eight-out-of-ten respondents (83.3%) who use the Access Services website reported being either "very" or "somewhat satisfied" with their experience.
- Roughly one-third of respondents (31.6%) preferred receiving information from Access Services through "e-mail," followed by one-quarter (25.7%) who preferred "text message," which marks a significant increase for text messaging preference compared to 2021 (+7.0 percentage points).



# Technological Access | Internet & Devices

Over eight-out-of-ten respondents reported having access to the internet, representing a significant increase of 8.3 percentage points compared to 2021. Similarly, more than eight-out-of-ten respondents indicated they use a "smart phone" to access the internet, followed by just over one-third who reported using a "home computer or desktop" or "portable computer or laptop."



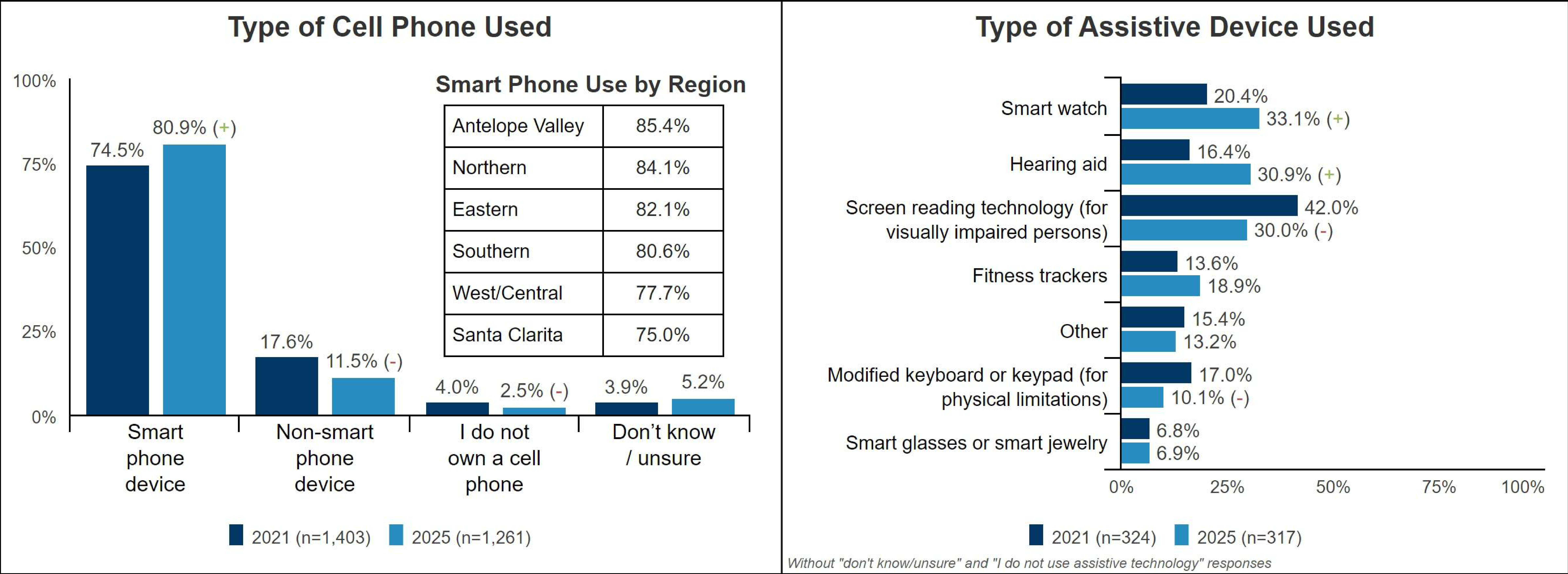
Q: Do you have access to the internet?

Q: What type of device do you use to access the internet? (Select all that apply)

+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



Eight-out-of-ten respondents reported currently owning and using a "smart phone device," a significant increase over 2021 (+6.4 percentage points). Of the respondents who use "assistive technology" to access the internet, one-third reported using a "smart watch," followed by three-out-of-ten utilizing "hearing aids" and/or "screen reading technology."



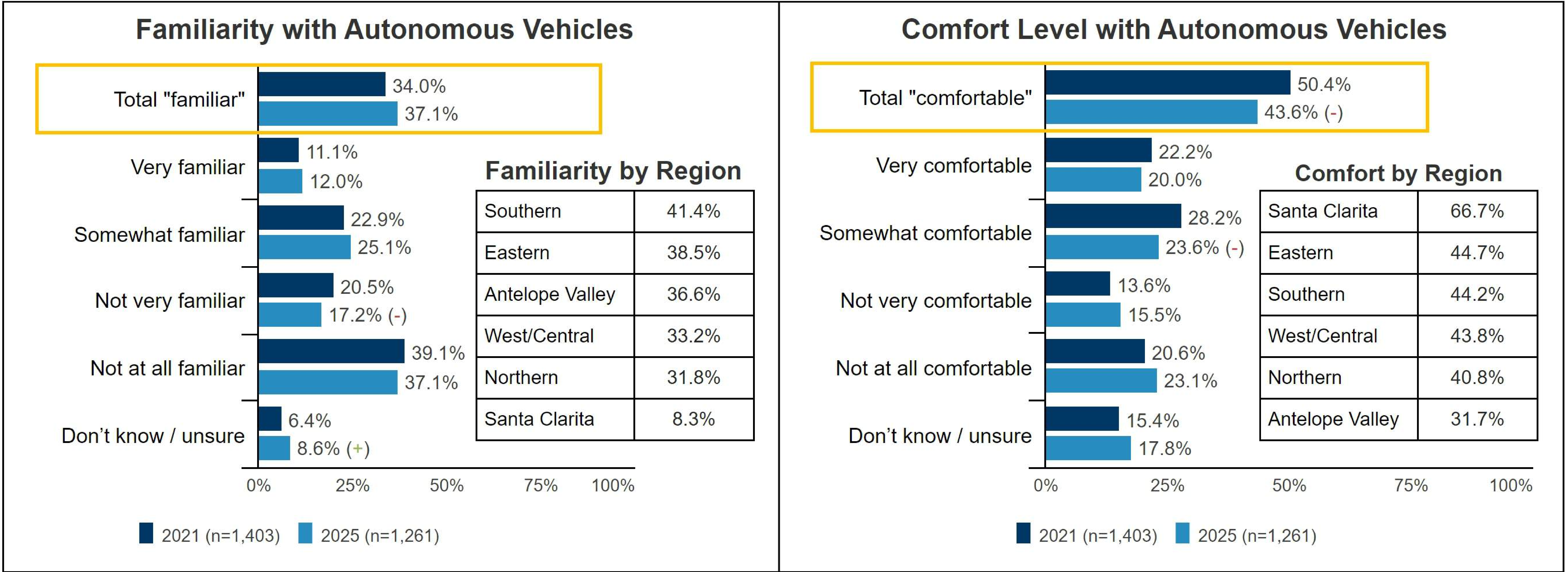
Q: If you own a cell phone, what type of cell phone do you currently own and use?  
Q: Do you currently use "assistive technology" to allow you to access websites? If so, what type of technology do you use? (Select all that apply)

+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



# Autonomous Vehicles | Familiarity & Comfort

Over one-third of respondents reported being either "very" or "somewhat familiar" with autonomous vehicles, while the same frequency of respondents reported being "not at all familiar." Additionally, over two-fifths of respondents reported being comfortable with the idea of boarding an accessible autonomous vehicle for future rides, which marked a significant decrease in comfort level from 2021 (-6.8 percentage points).

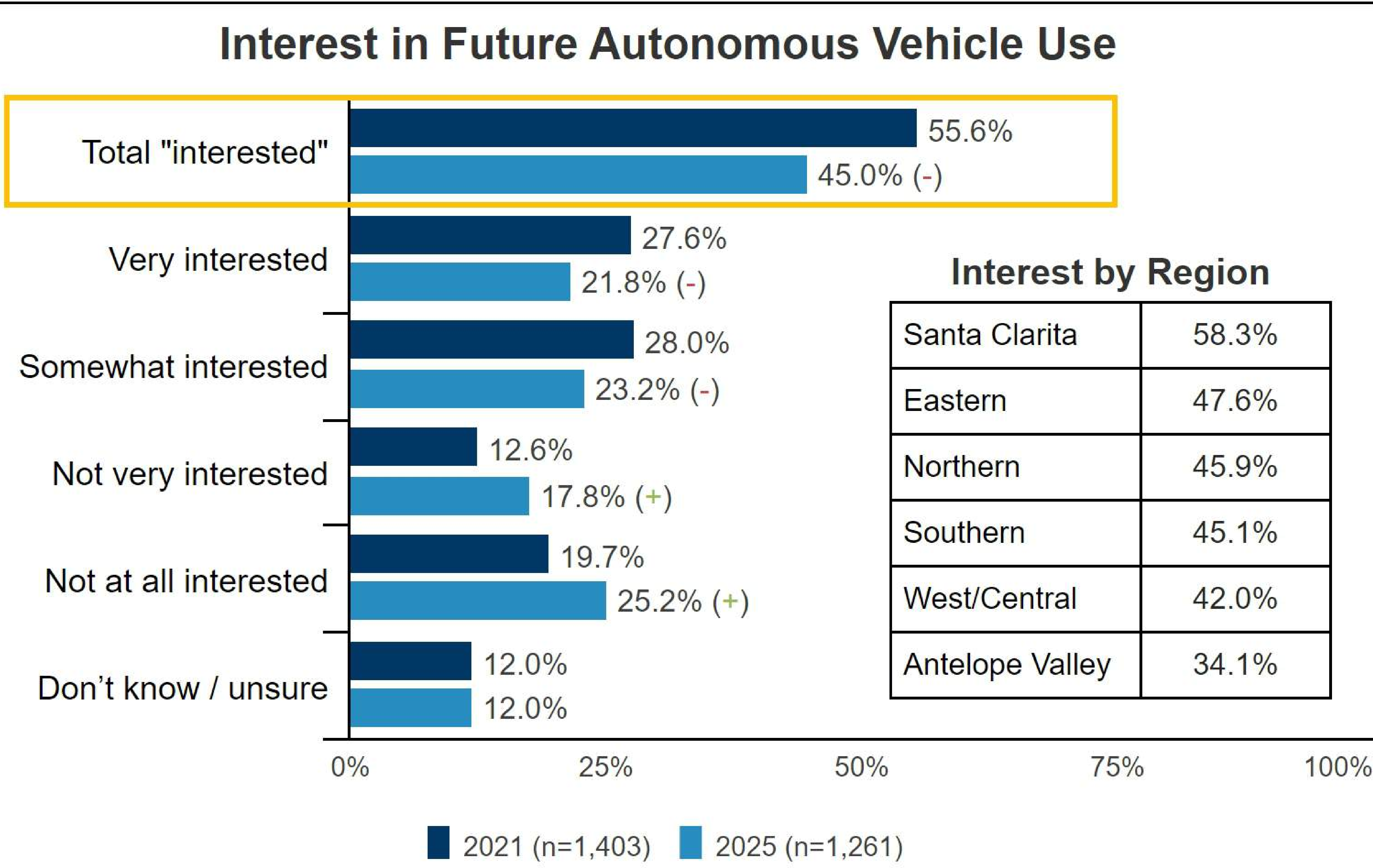
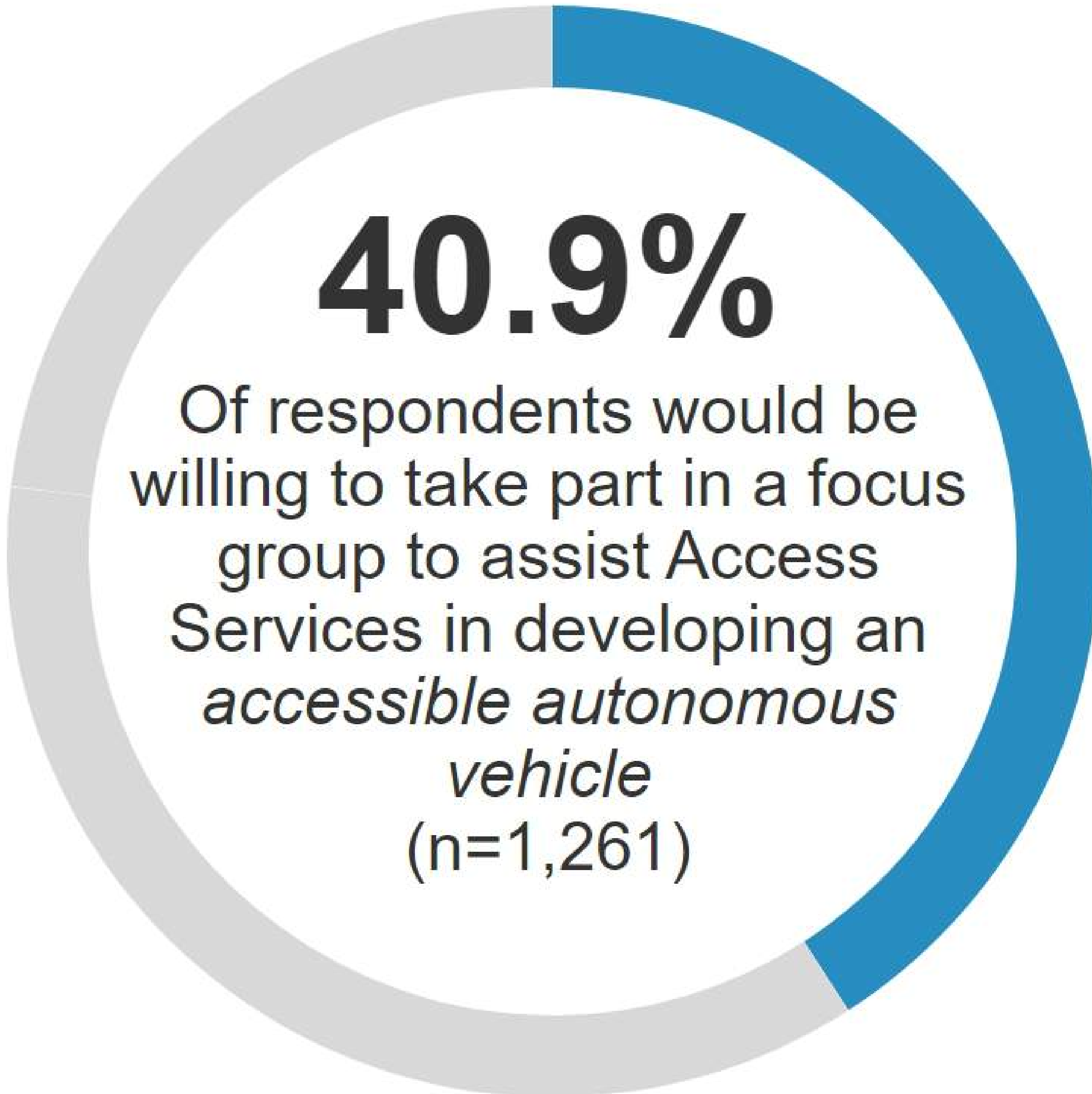


Q: How familiar would you say you are with autonomous vehicles?  
Q: If offered through Access Services, how comfortable would you be boarding an accessible autonomous vehicle for future rides?

+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



Over two-fifths of respondents would be interested in boarding an accessible autonomous vehicle for future rides, which was also a significant decrease from 2021 (-10.6 percentage points). When asked about their willingness to participate in a focus group to assist Access Services in developing an accessible autonomous vehicle, two-fifths reported interest, suggesting additional potential interest in the future.



Q: Would you be willing to take part in a focus group to assist Access Services in developing an accessible autonomous vehicle?

Q: How interested would you be in boarding an accessible autonomous vehicle for future rides?

+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



# Autonomous Vehicles | Wheelchair Accessibility

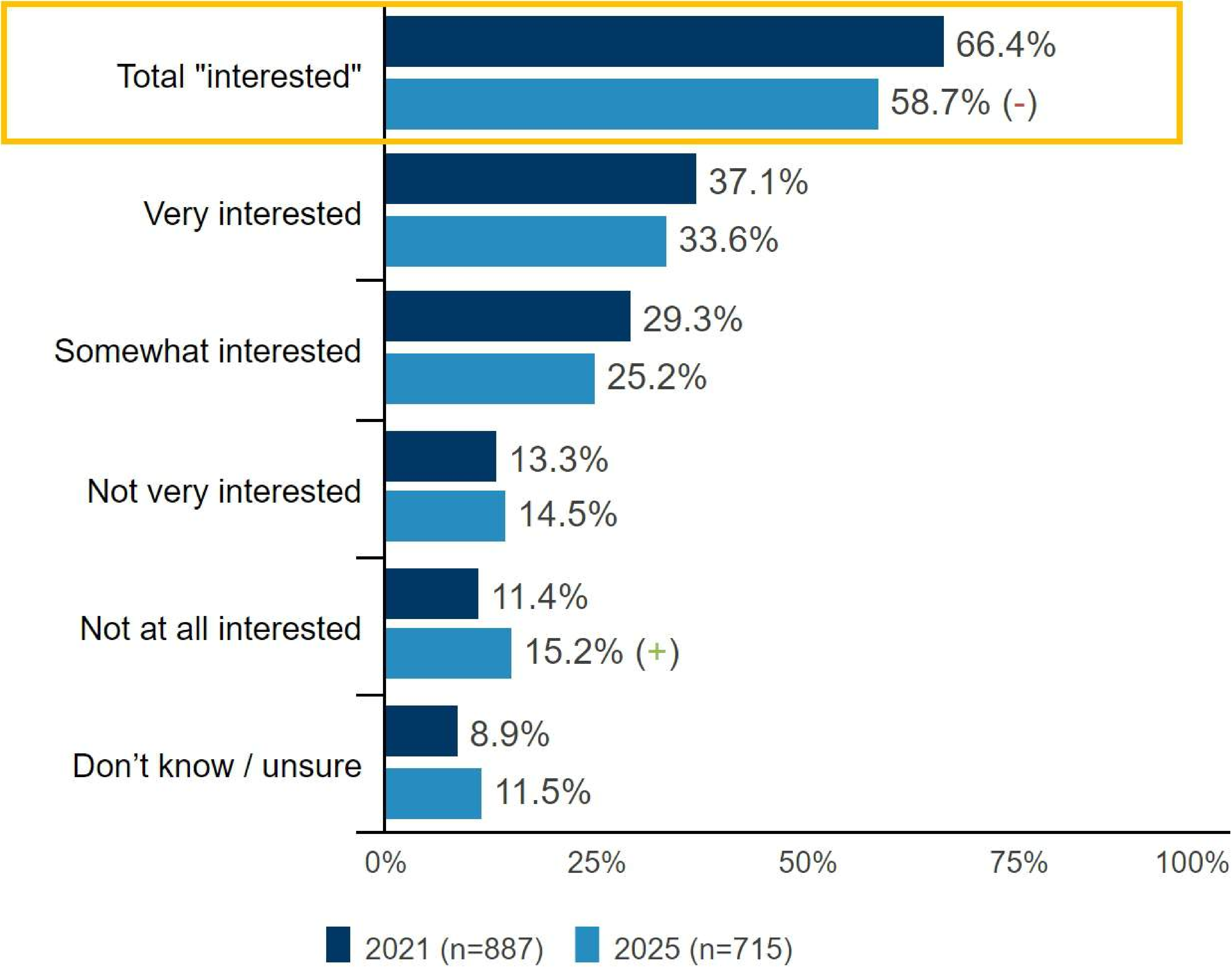
Of the respondents who use a wheelchair, nearly three-fifths were interested in Access Services offering vehicles that utilized automatic wheelchair securement, a significant decrease from 2021 (-7.7 percentage points).

Of note, more respondents in the Santa Clarita region were interested in this service compared to other regions.

Interest by Region

Santa Clarita	66.7%
Southern	61.7%
Northern	58.8%
West/Central	57.4%
Eastern	56.3%
Antelope Valley	55.2%

Interest in Autonomous Vehicle with Wheelchair Securement

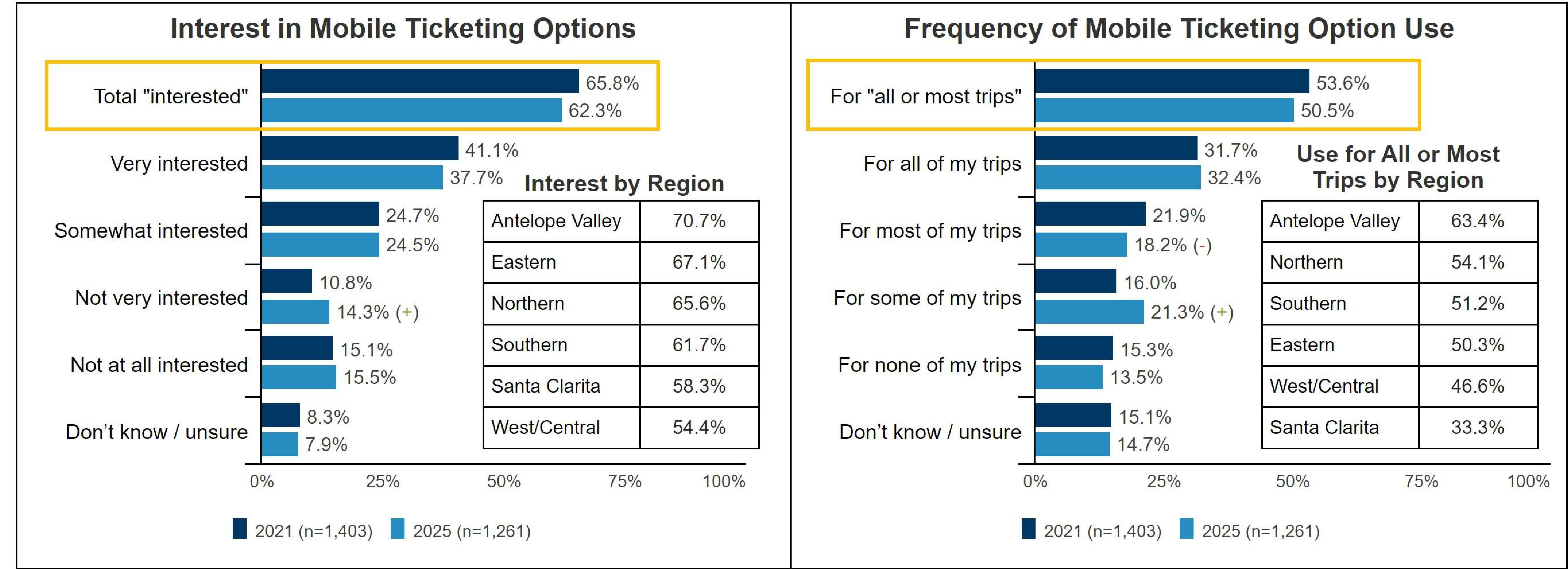


Q: If offered through Access Services, how interested would you be in riding in a vehicle that utilizes automatic wheelchair securement, as opposed to your driver manually securing your wheelchair?

+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



Over three-fifths of respondents were interested in Access Services offering a mobile ticketing option to allow pre-payment and remote payment for rides. Further, one-half of respondents would utilize mobile ticketing options through Access Services for either "all" or "most trips." Of note, respondents from Antelope Valley reported greater interest in mobile ticketing options and a greater likelihood to use mobile ticketing options for all or most of their trips compared to respondents from other regions.



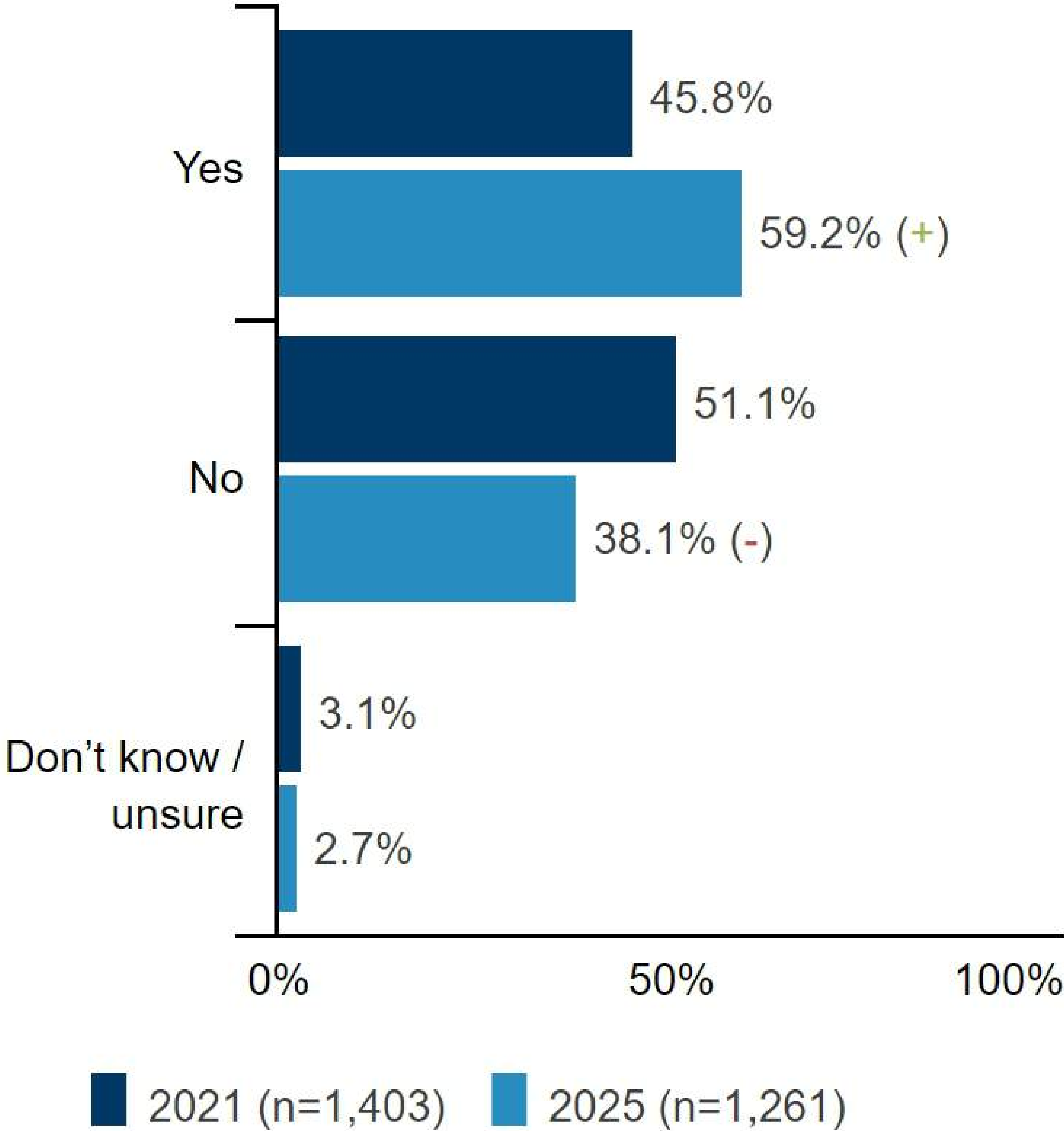


# Mobile App | Usage & Usability

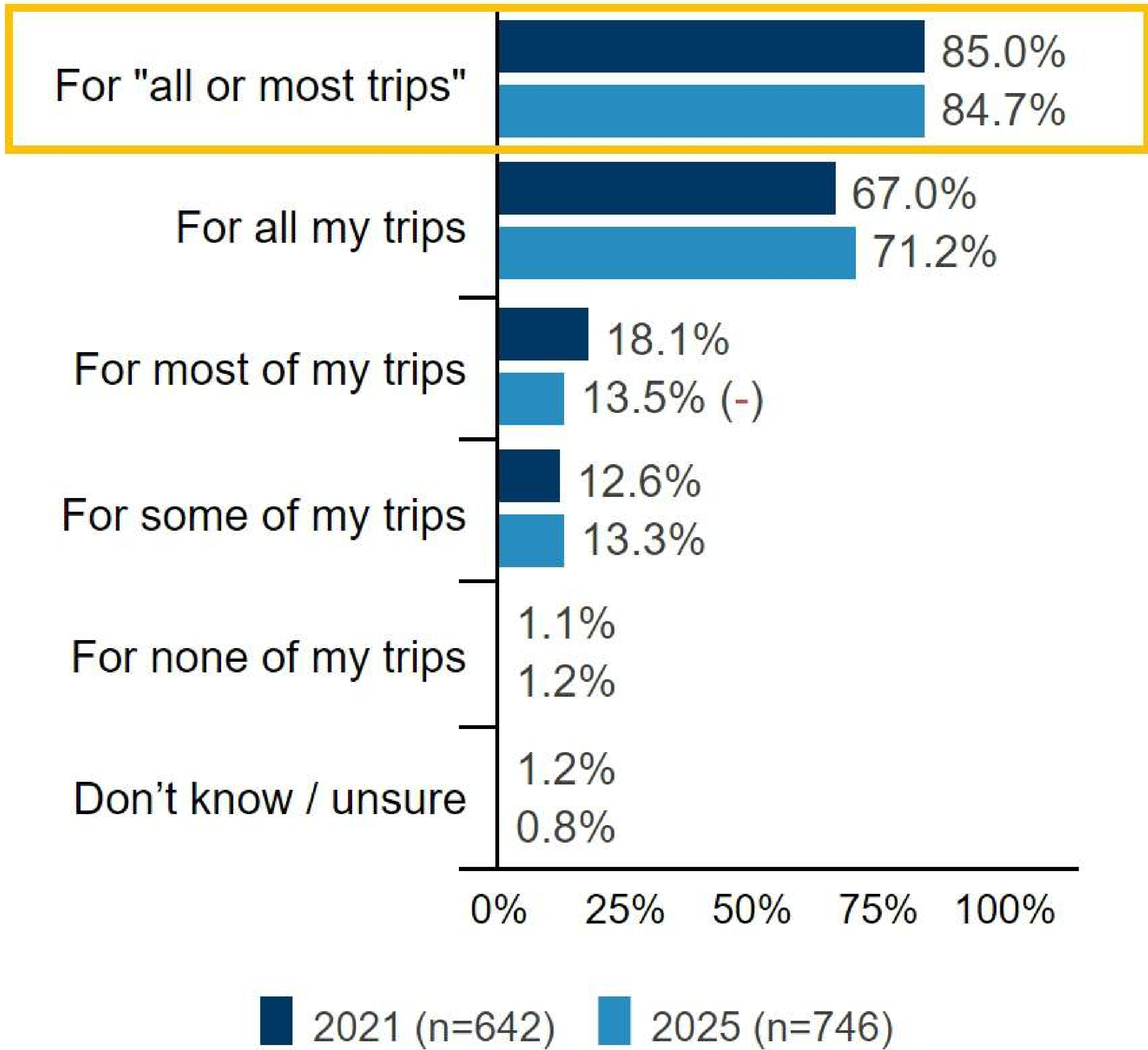
Nearly three-fifths of respondents reported previously using the *Where's My Ride* mobile app, representing a significant increase of 13.4 percentage points compared to 2021. Among respondents who use the app, over eight-out-of-ten reported using it for either "all" or "most trips." Similarly, more than eight-out-of-ten users rated the ease of using the app as either "very" or "somewhat easy."

## "Where's My Ride" Adoption

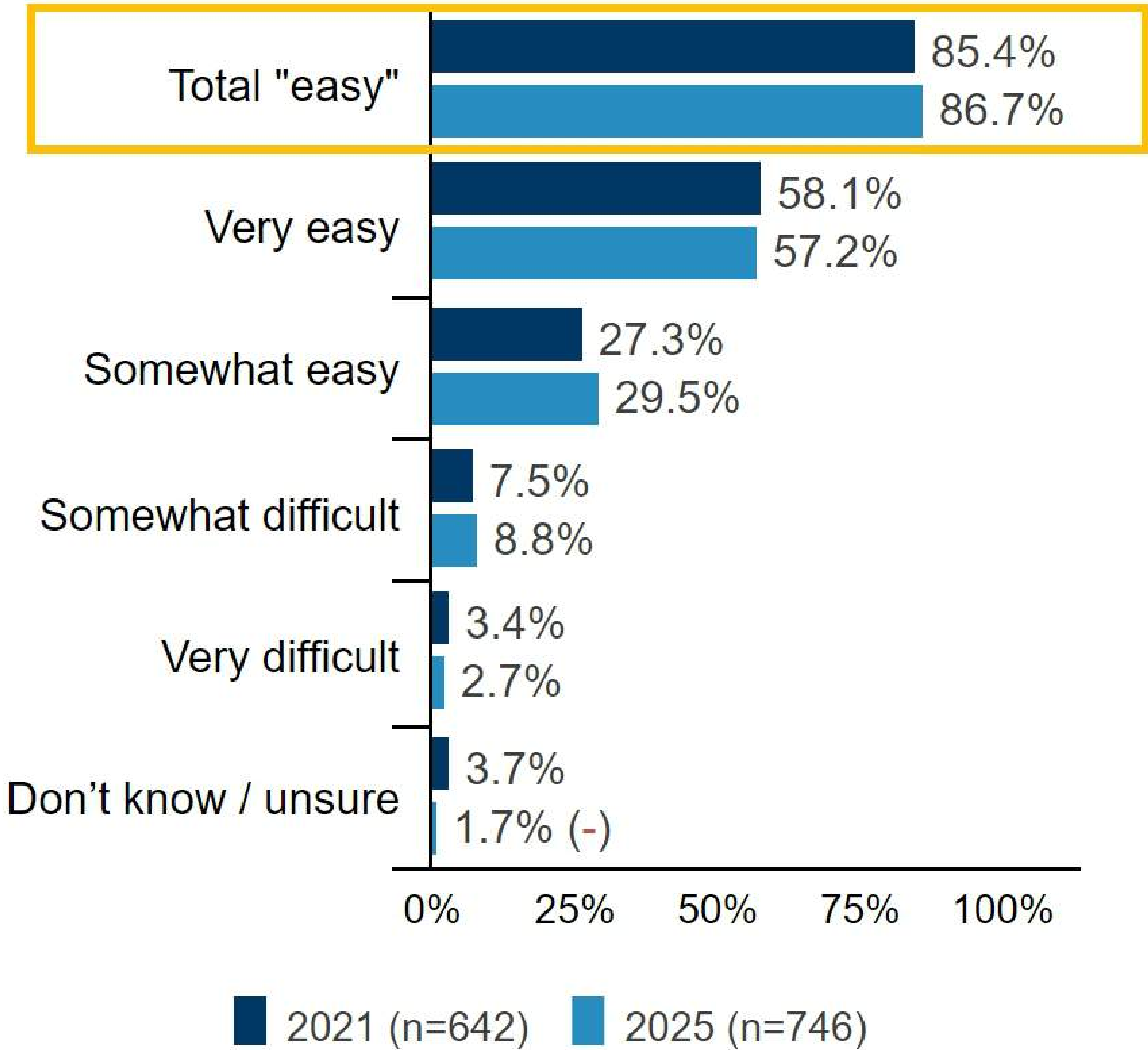
### App Usage



### Frequency of Use



### Ease of Using App

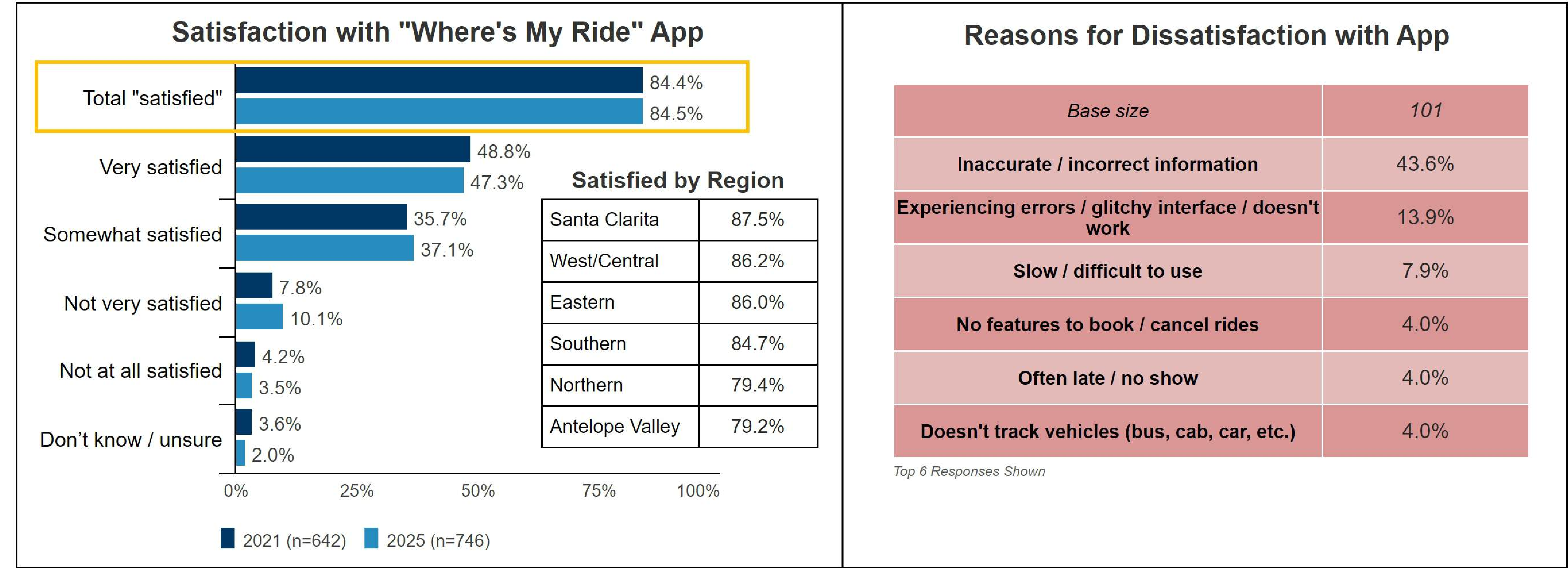


Q: Have you previously used the *Where's My Ride* mobile app to see your reservation status or track your ride in real time with Access Services?  
Q: How often would you say you use the *Where's My Ride* mobile app?  
Q: How would you rate the ease of using the *Where's My Ride* mobile app?

+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



Over eight-out-of-ten respondents reported being satisfied with their experience using the *Where's My Ride* mobile app, with nearly one-half indicating they were "very satisfied," unchanged since 2021 despite the significant increase in self-reported usage. Among those who were not satisfied, over two-fifths cited inaccurate or incorrect information as the primary reason for their dissatisfaction.

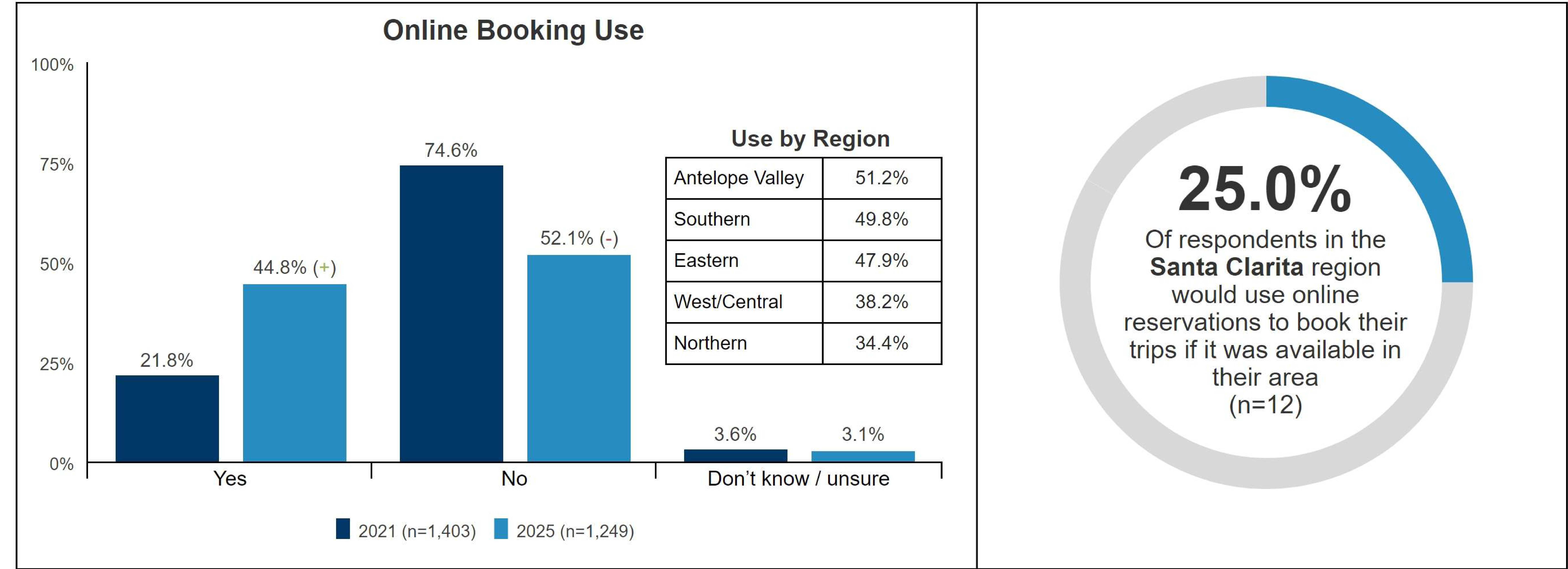


Q: How satisfied are you with your experience using the *Where's My Ride* mobile app?  
Q: In the last question you answered that you were not very satisfied or not at all satisfied. May I ask why you answered that?



# Online Booking | Usage

Over two-fifths of respondents currently utilize online booking through Access Services, which was a significant increase over 2021 (+23.0 percentage points). Usage of online booking is highest among respondents from Antelope Valley, the Southern, and Eastern regions. Of note, one-quarter of respondents from the Santa Clarita region would be interested in using online reservations to book their trips with Access Services if it were available.



Q: Do you currently utilize online booking through Access Services?

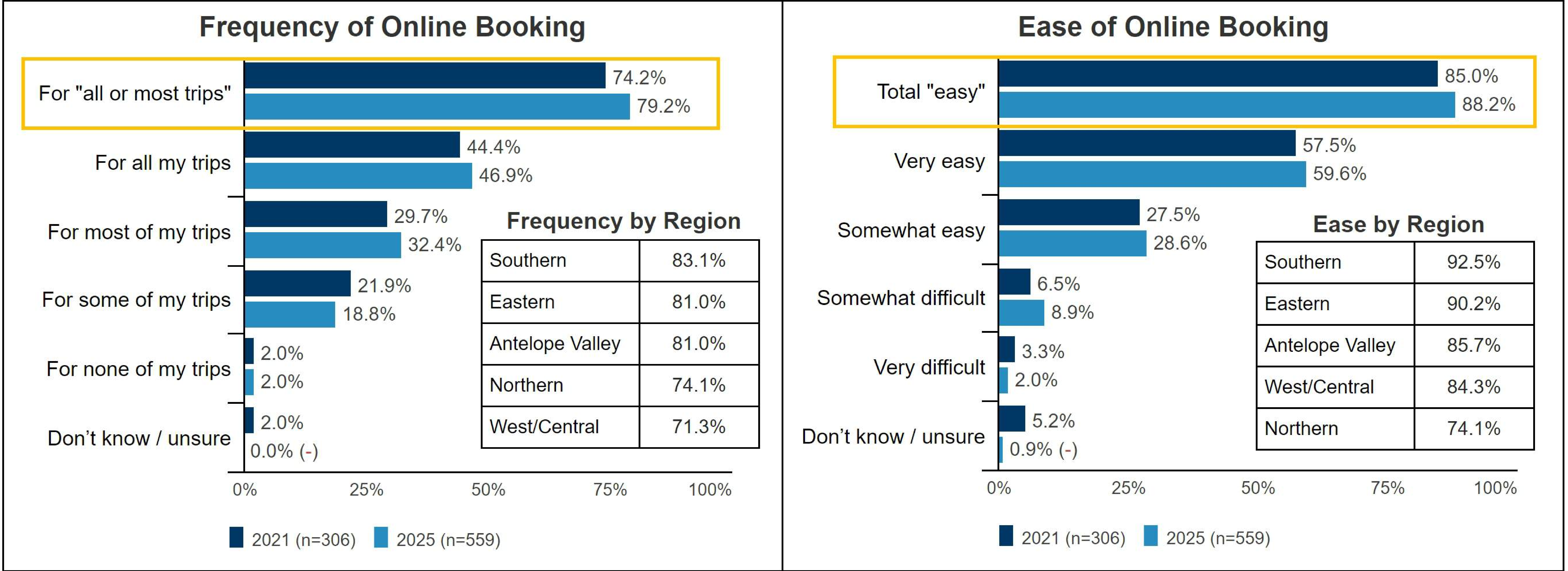
Q: At this time the Santa Clarita Region does not have an on-line reservation service. If on-line reservations were available in your area, do you believe you would use it for booking some or all of your trips?

+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



# Online Booking | Frequency & Ease

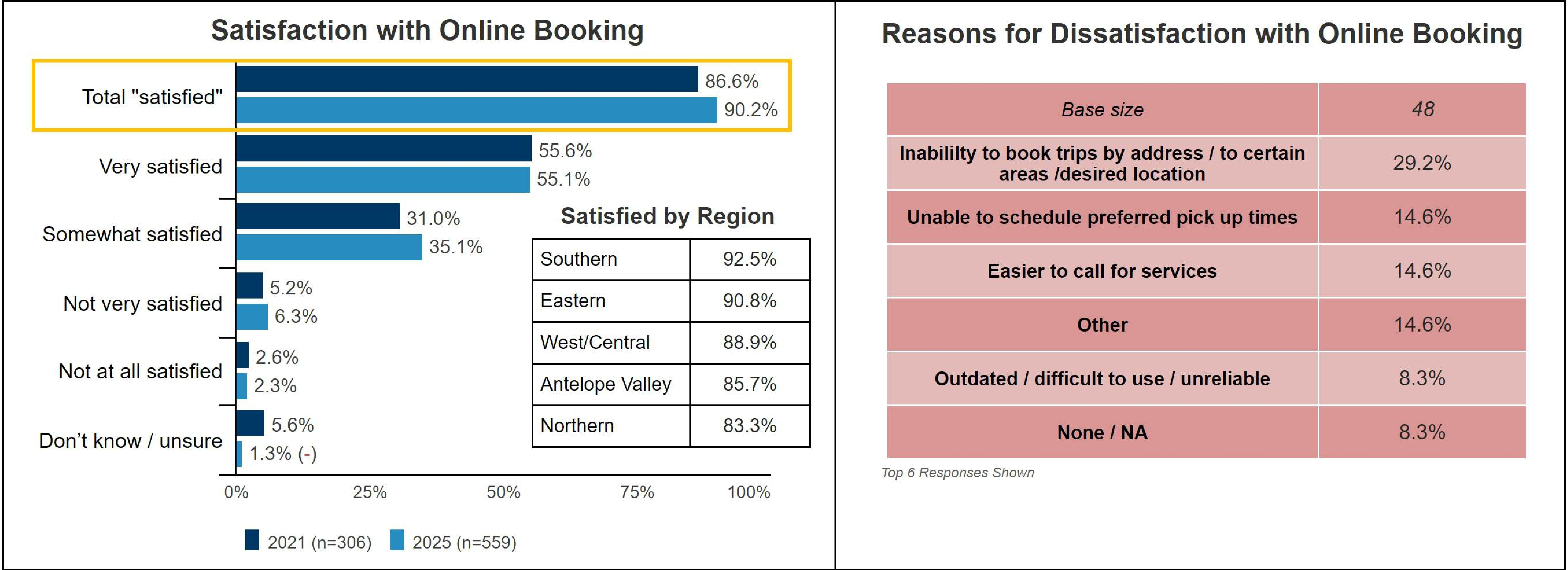
Over three-quarters of respondents who use the Access Services online booking platform reported using it for "all" or "most trips." Further, nearly nine-out-of-ten of these respondents rated the ease of using the online booking feature as either "very easy" or "somewhat easy." Both metrics remained on par with 2021 results despite an increase in self-reported usage in 2025.



Q: How often would you say you use the online booking feature?  
Q: How would you rate the ease of using the online booking feature?



Among respondents who use the online booking platform, nine-out-of-ten reported being either "very" or "somewhat satisfied," with over one-half indicating they were "very satisfied." Among those who were not satisfied, three-out-of-ten cited the inability to book trips by address, to certain areas, or to desired locations as their primary reason for dissatisfaction.

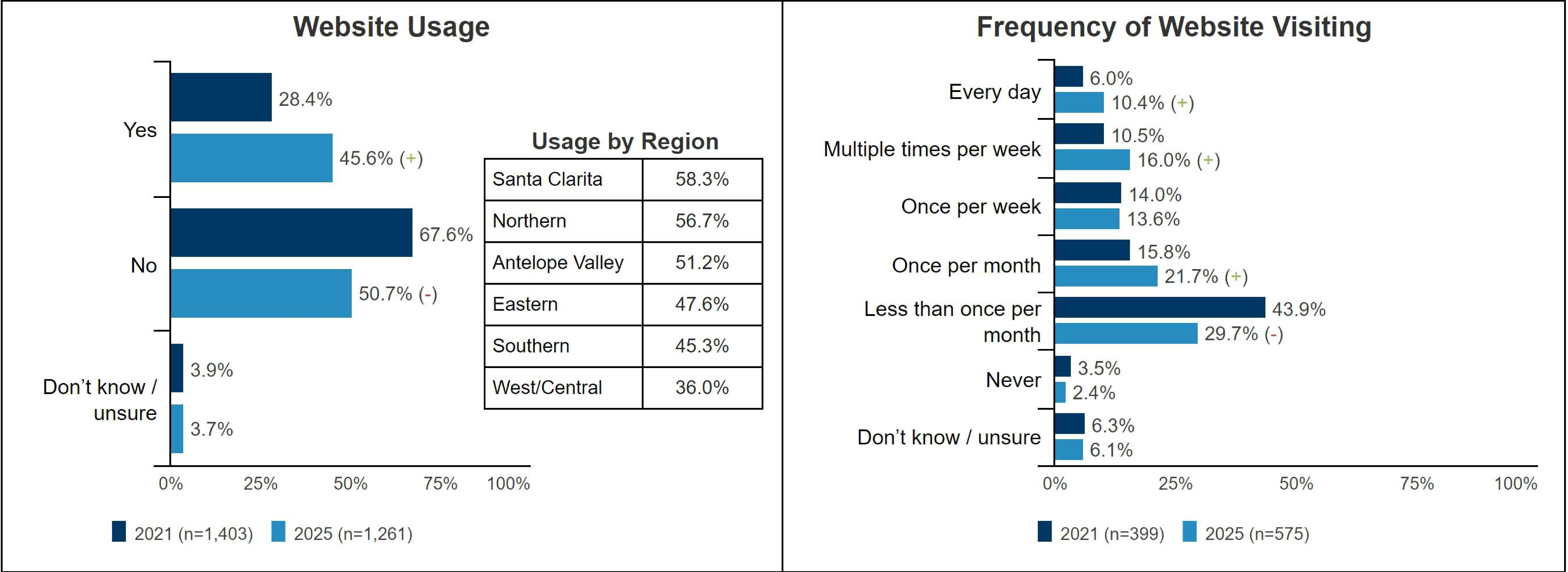


Q: How satisfied are you with your experience using the online booking feature?  
Q: In the last question you answered that you were not very satisfied or not at all satisfied. May I ask why you answered that?



# Website | Frequency of Use

Over two-fifths of respondents reported previously using the Access Services website, which was a significant increase over 2021 (+17.2 percentage points). Of the respondents who have visited the website, over three-fifths (61.7%) reported visiting the website at least once per month, while over one-quarter visited less than once per month. In addition, daily use (+4.4 percentage points) and use of the website multiple times a week (+5.5 percentage points) also increased significantly in 2025.



Q: Have you previously visited the Access Services website?

Q: How often do you visit the Access Services website?

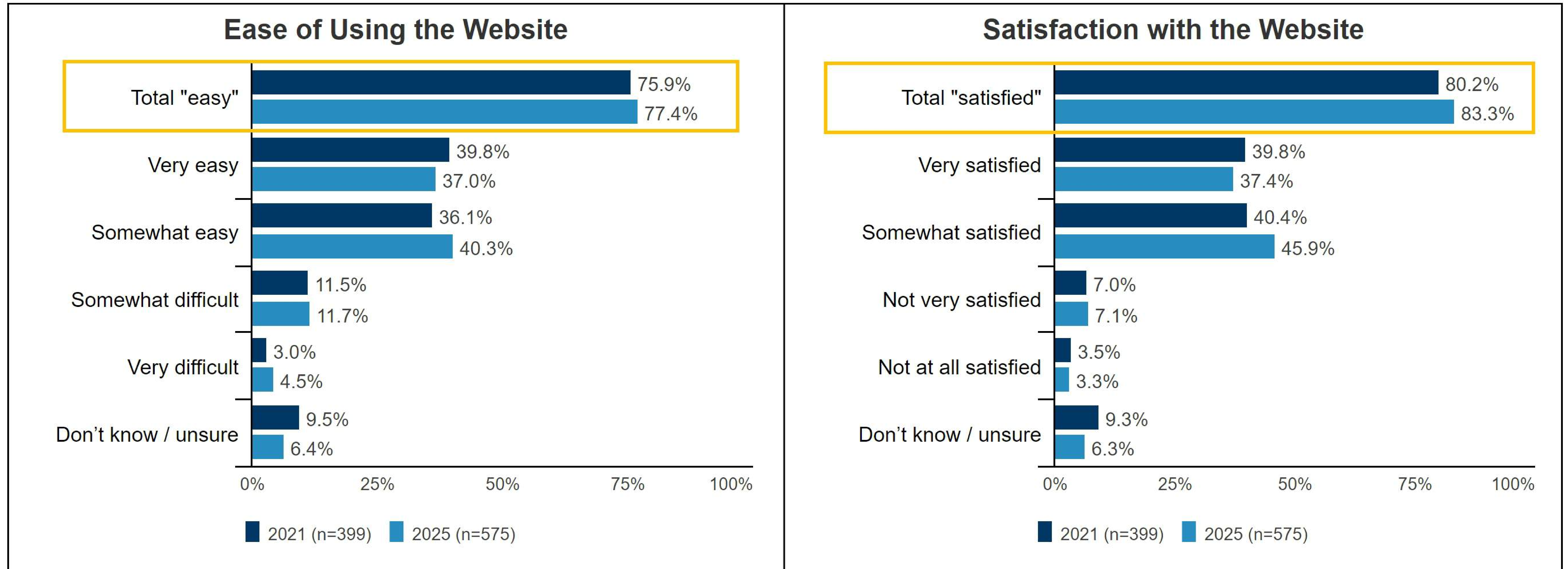
+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



# Website | Ease of Use & Satisfaction

access

Over three-quarters of respondents who use the Access Services website reported that it was either "very" or "somewhat easy" to use. Further, over eight-out-of-ten respondents were either "very" or "somewhat satisfied" with the Access Services website.



Q: How would you rate the ease of navigating the Access Services website?

Q: Overall, how satisfied are you with the Access Services website?



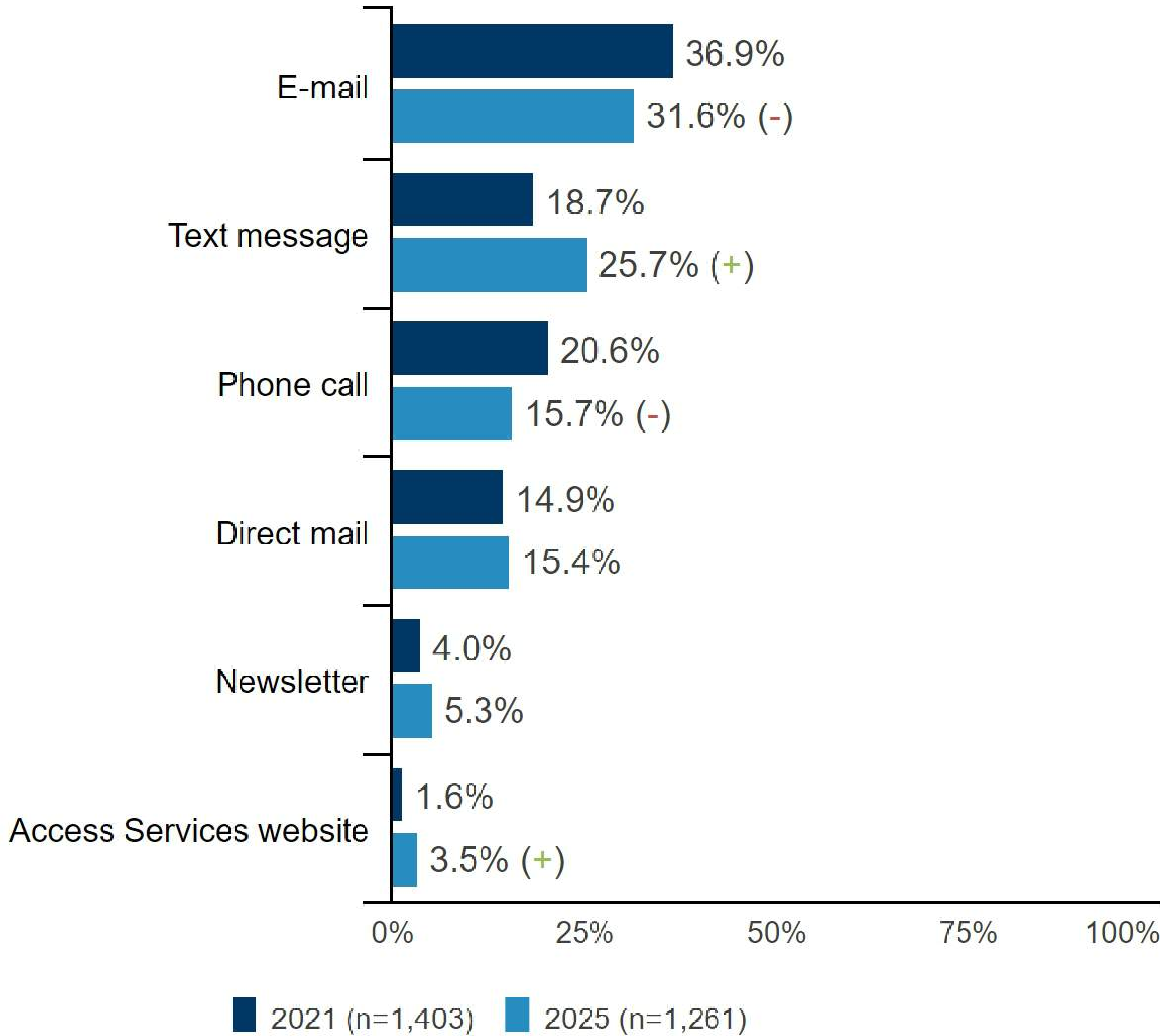
Roughly one-third of respondents preferred receiving information from Access Services through "e-mail," followed by one-quarter who preferred "text message" communications. Of note, significantly more respondents in 2025 preferred to receive information from Access Services through "text message" (+7.0 percentage points) compared to 2021.

Preferred Method by Region

	E-mail	Text message	Phone call
Antelope Valley	26.8%	19.5%	31.7%
Eastern	33.5%	28.8%	12.6%
Northern	33.8%	22.9%	14.6%
Santa Clarita	16.7%	41.7%	16.7%
Southern	34.1%	23.6%	15.9%
West/Central	25.4%	26.9%	17.3%

Top 3 methods shown

Preferred Method of Receiving Info from Access



Top 6 methods shown

Q: Which of the following is your preferred method of receiving information from Access Services?

+/- indicate statistical significance at a 95% confidence level, with the color denoting whether it is higher or lower than the compared year.



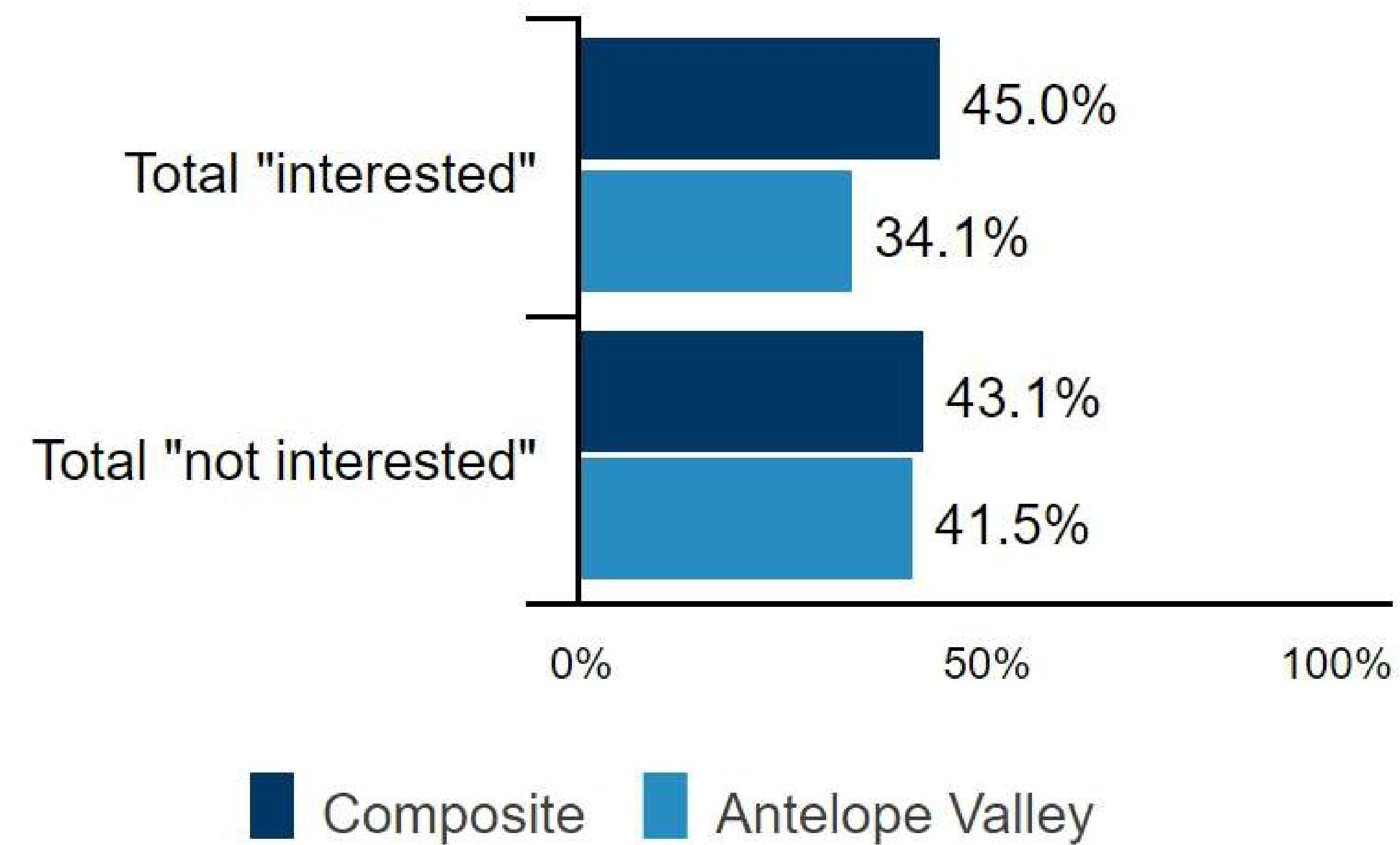
# Regional Breakdown



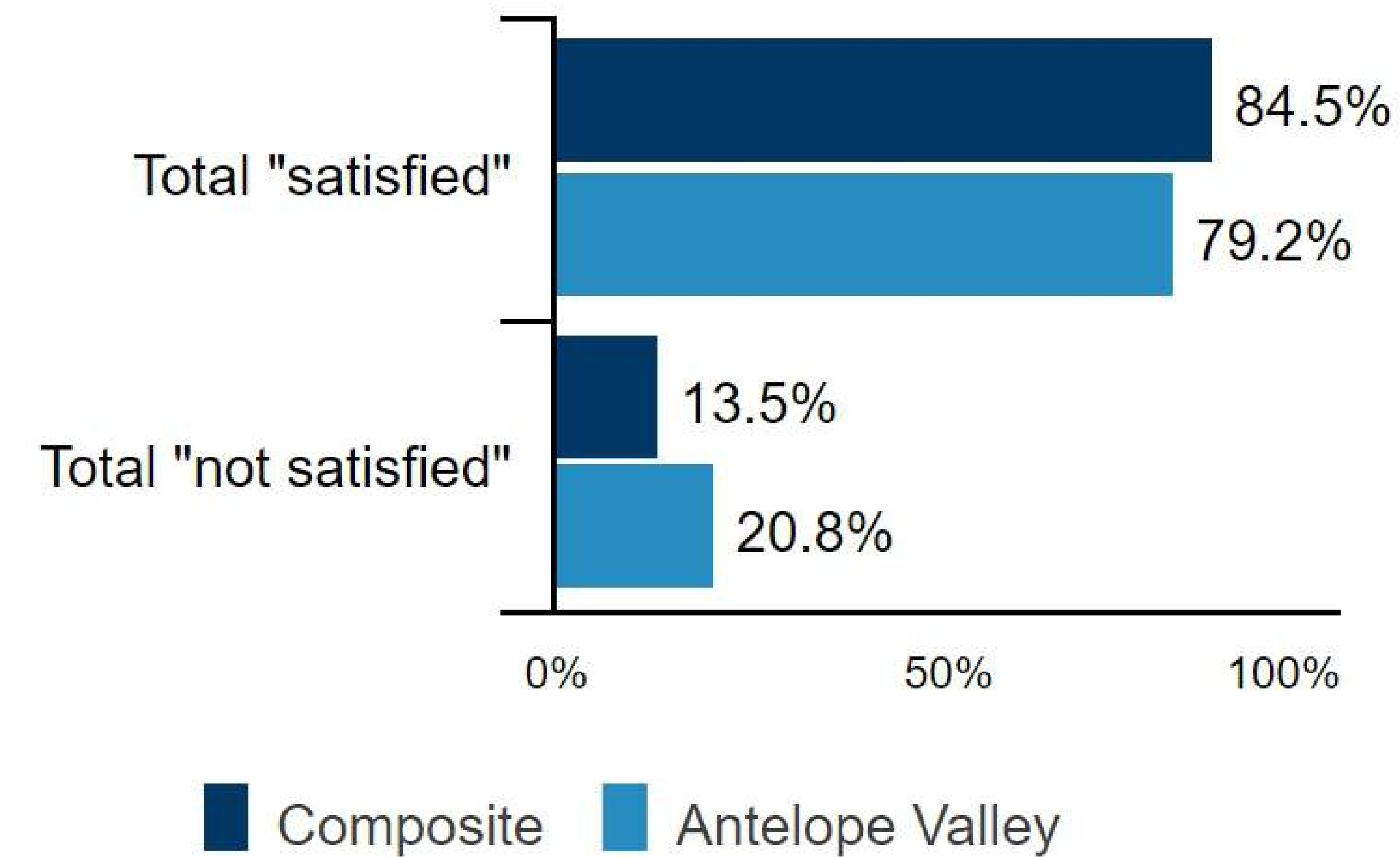
# Regional Snapshot | Antelope Valley



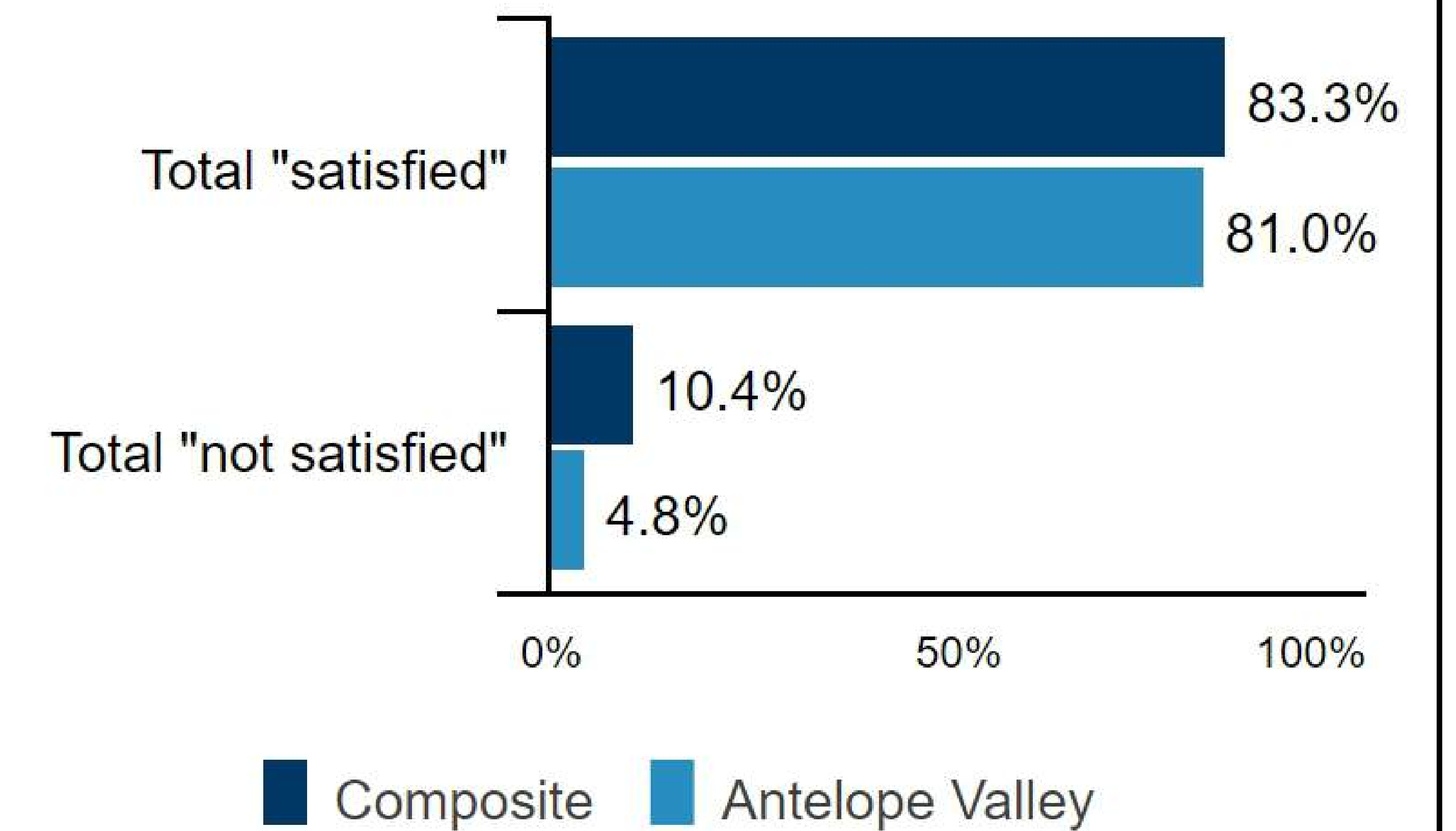
## Interest in Autonomous Vehicles



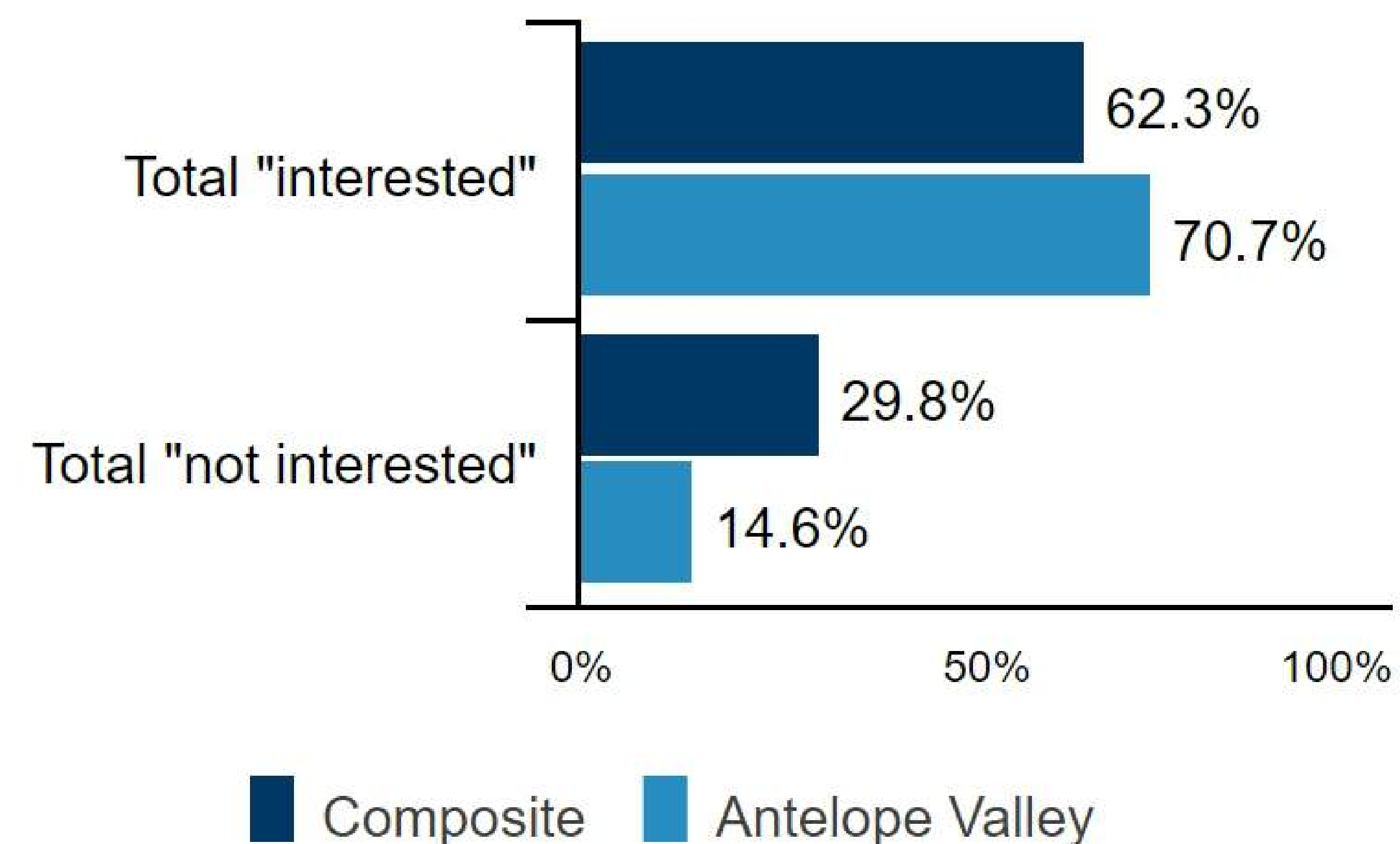
## Where's My Ride Satisfaction



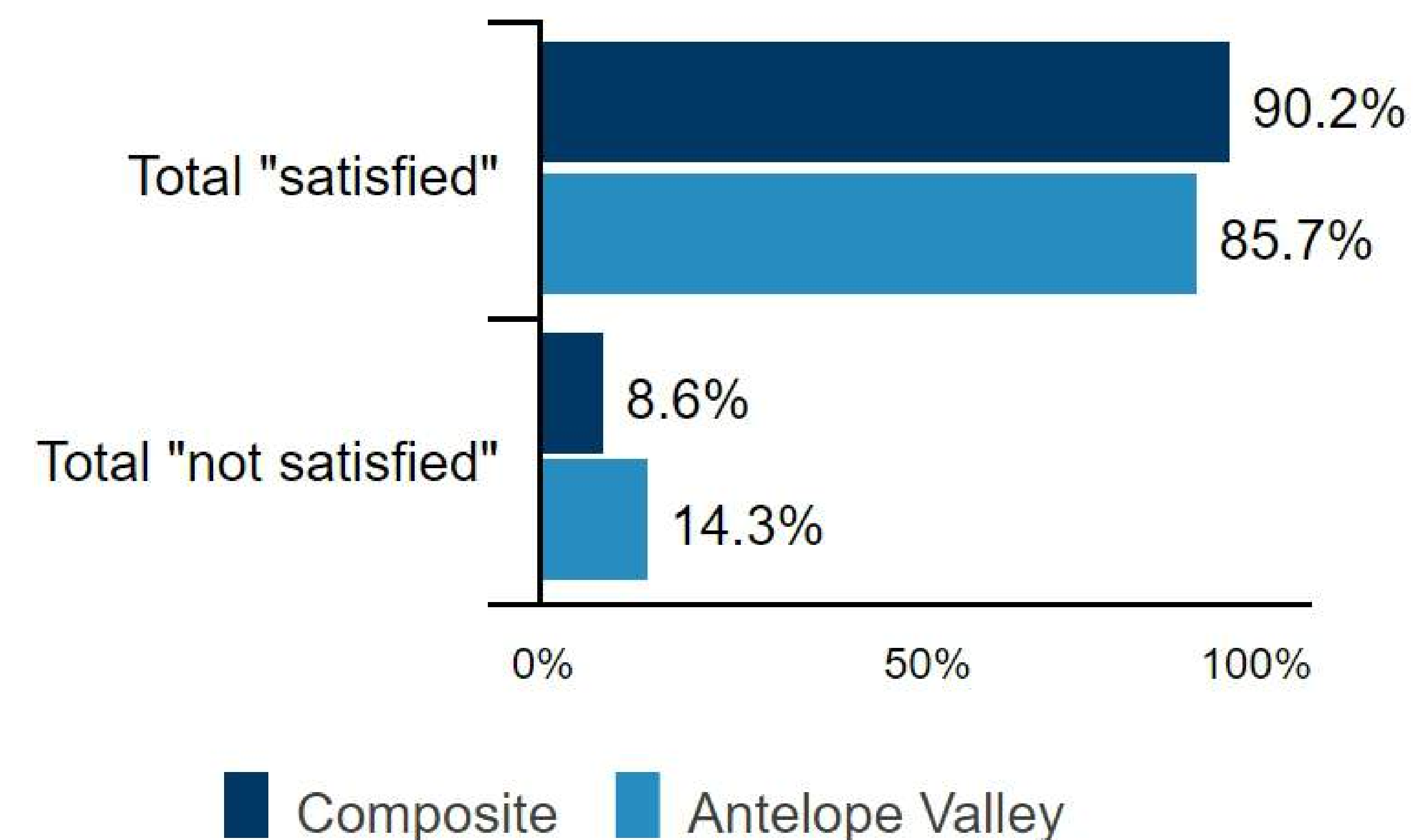
## Website Satisfaction



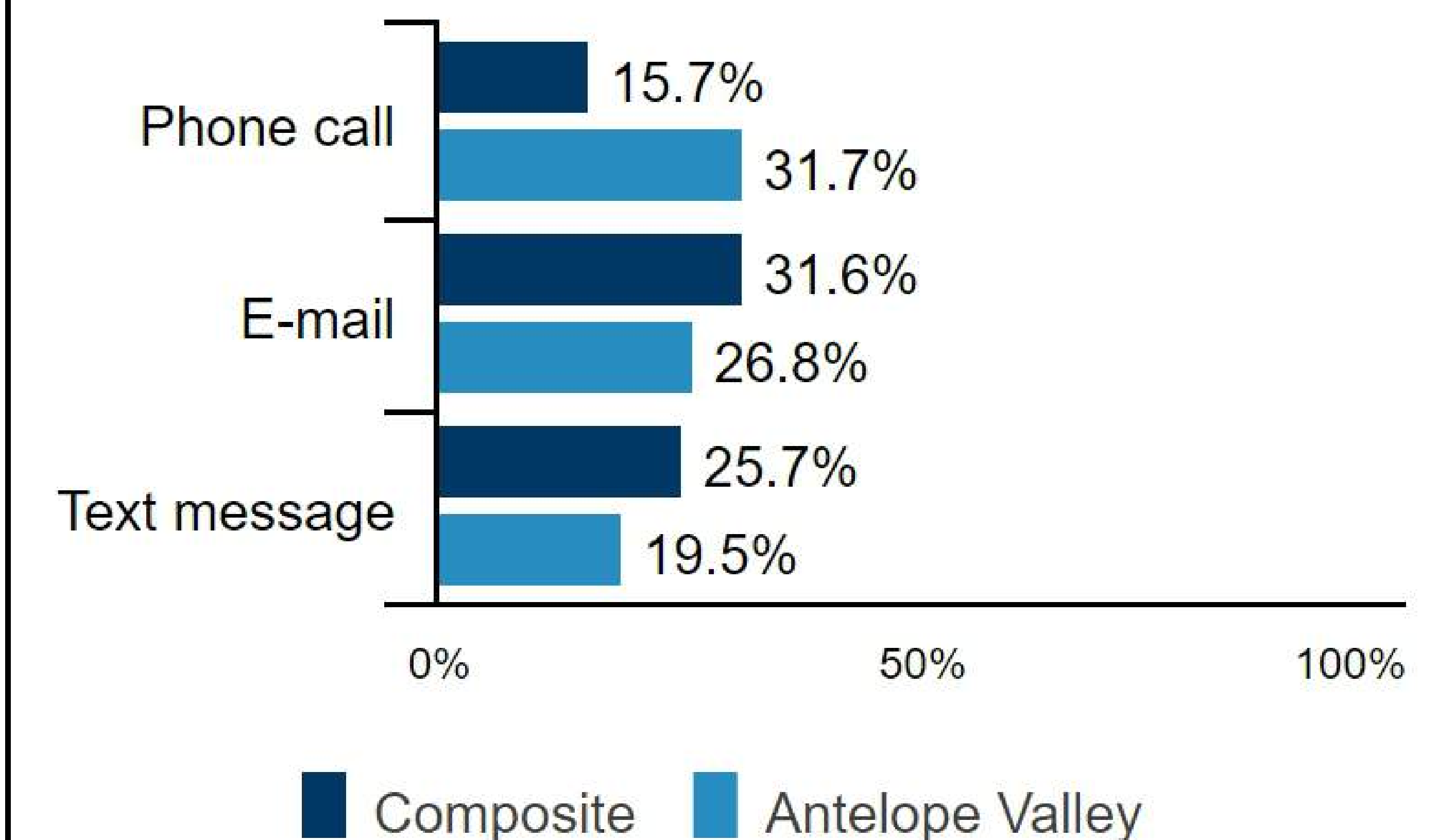
## Interest in Mobile Ticketing



## Online Booking Satisfaction



## Preferred Communication Methods

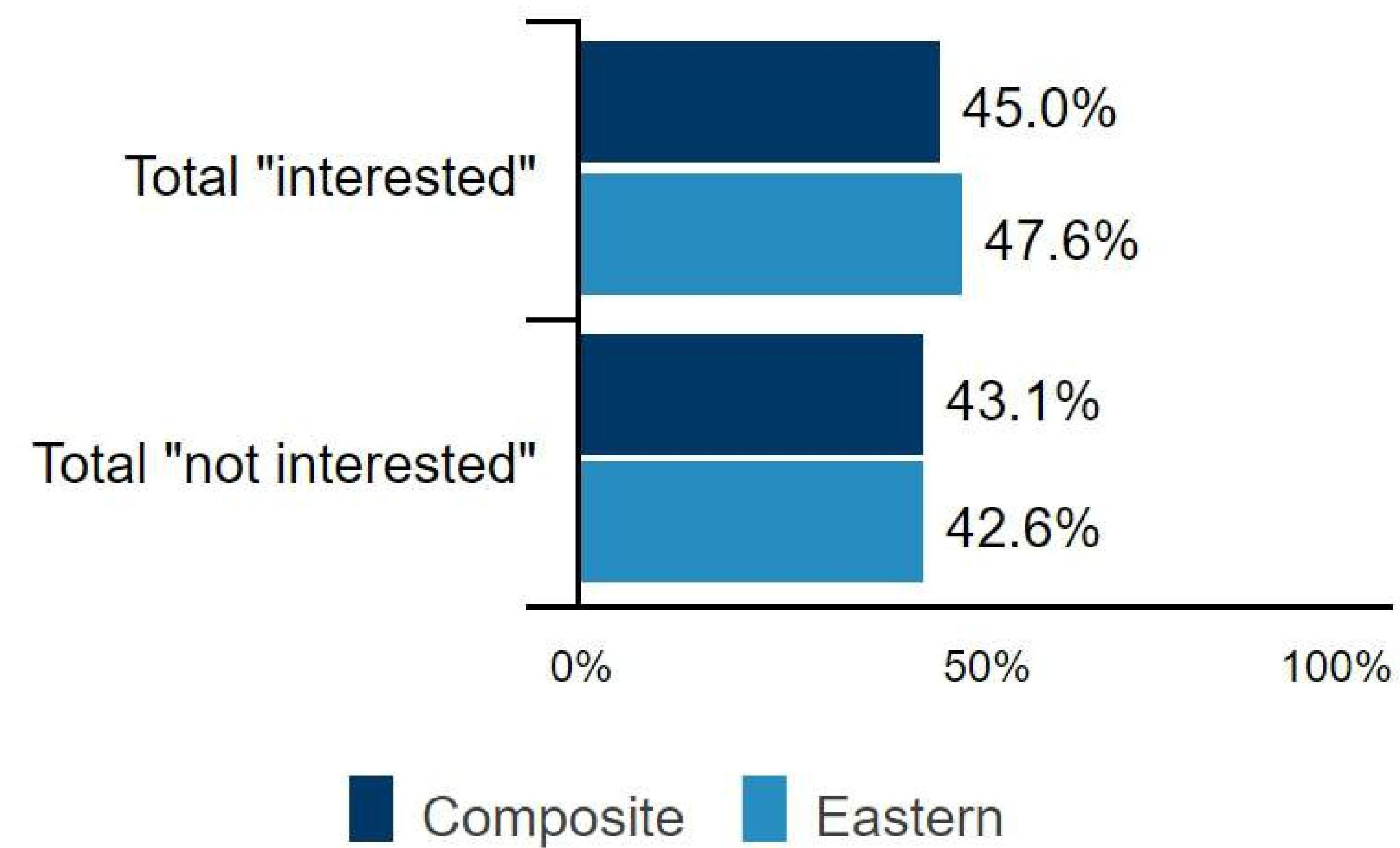




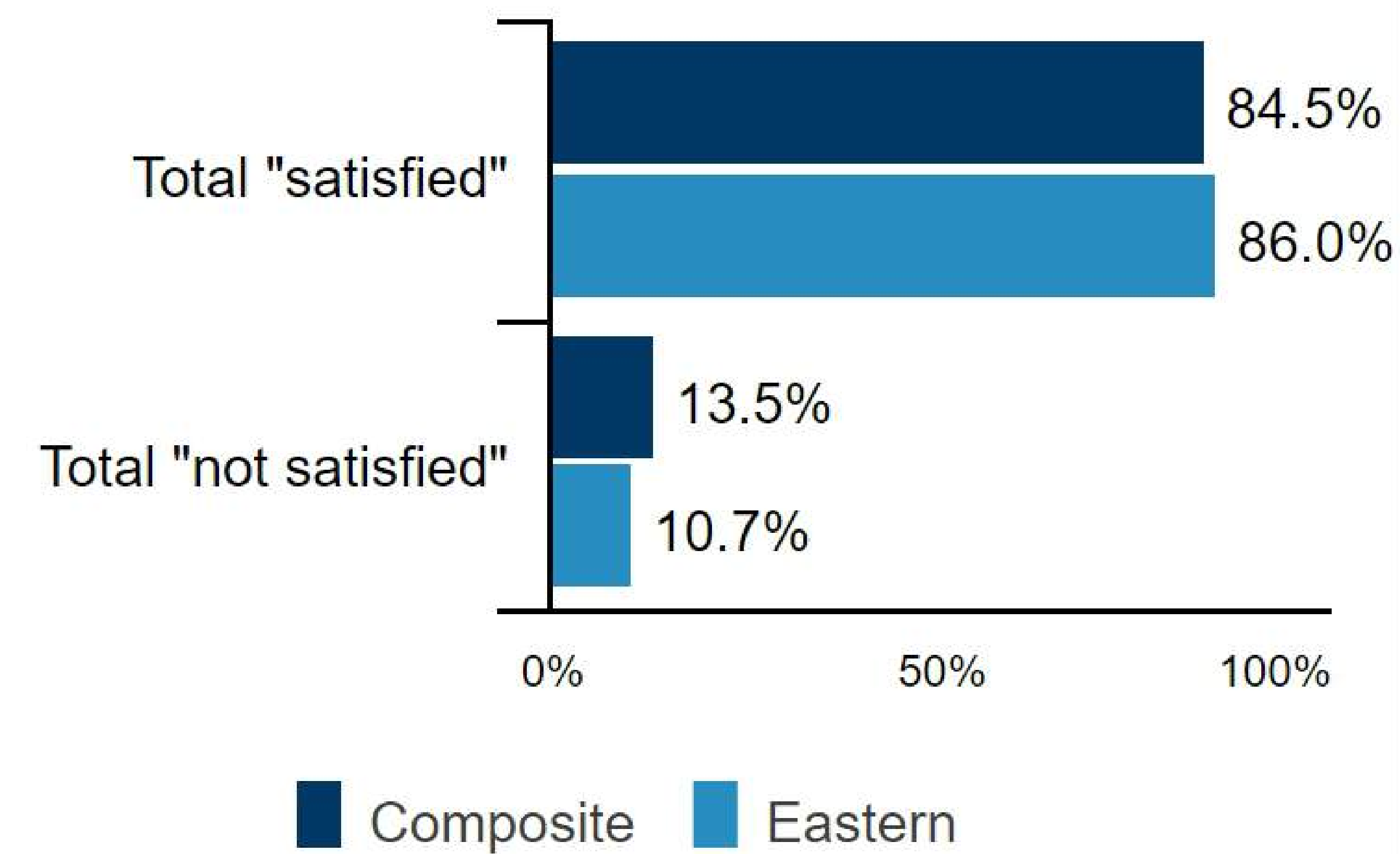
# Regional Snapshot | Eastern



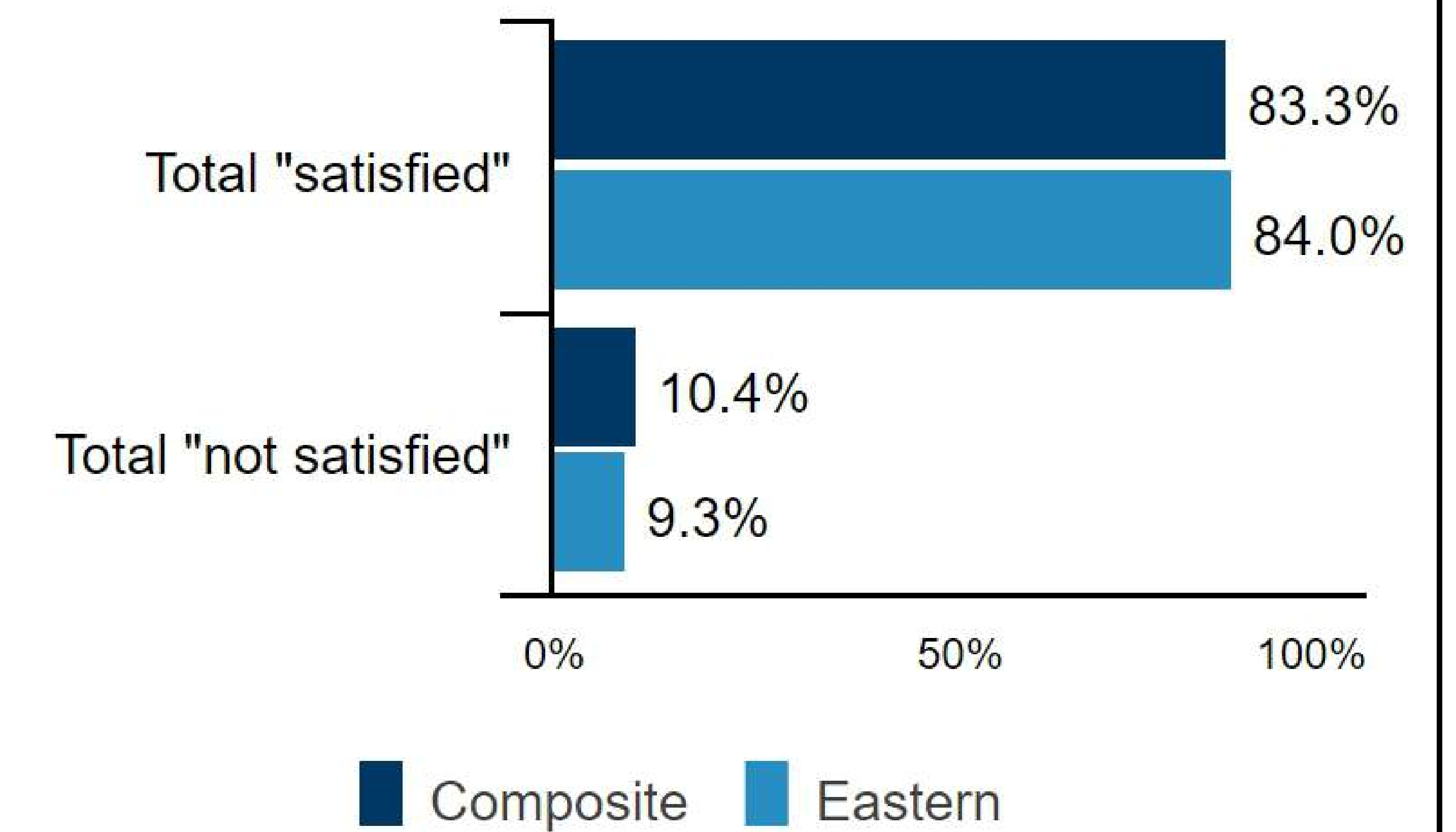
## Interest in Autonomous Vehicles



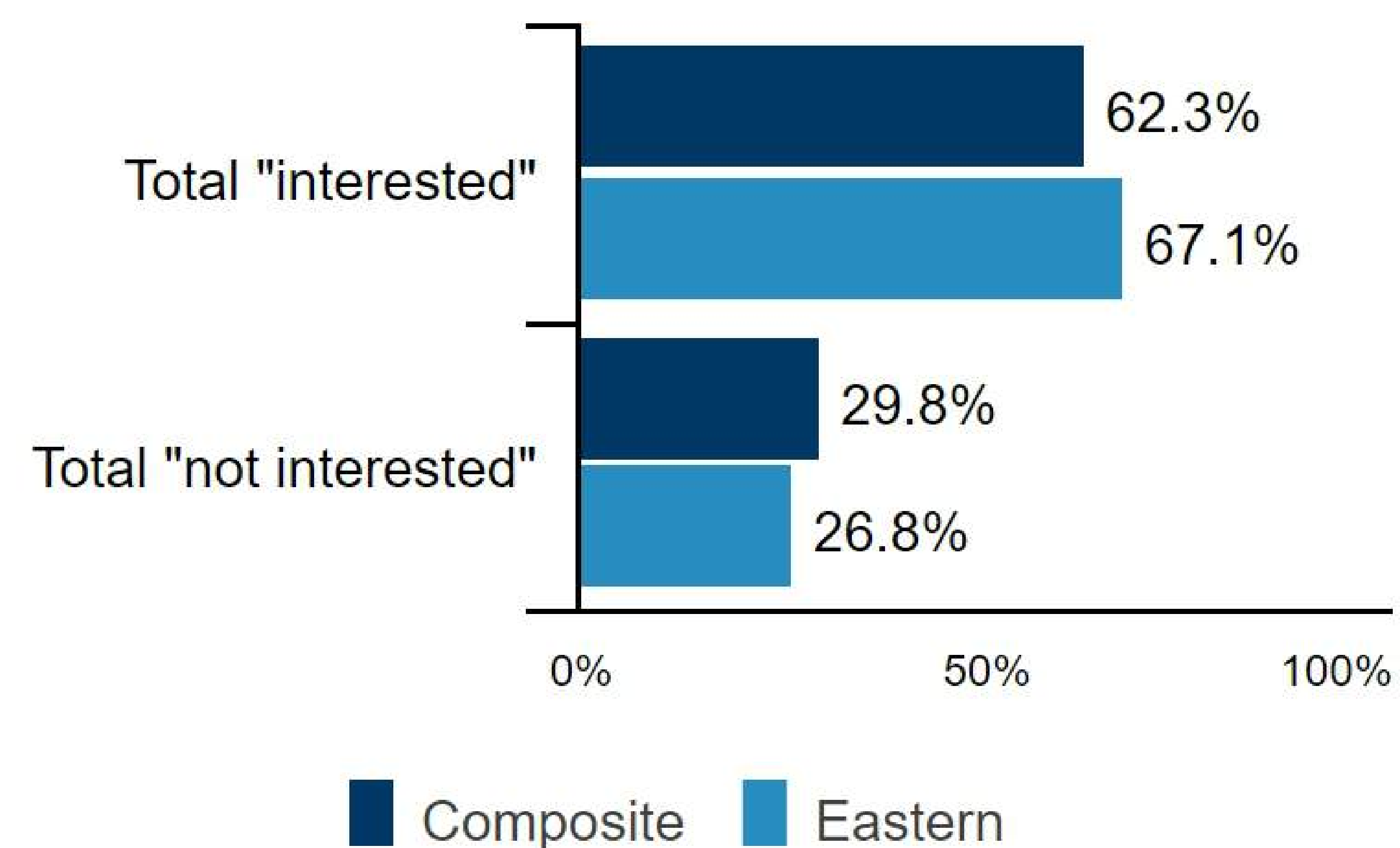
## Where's My Ride Satisfaction



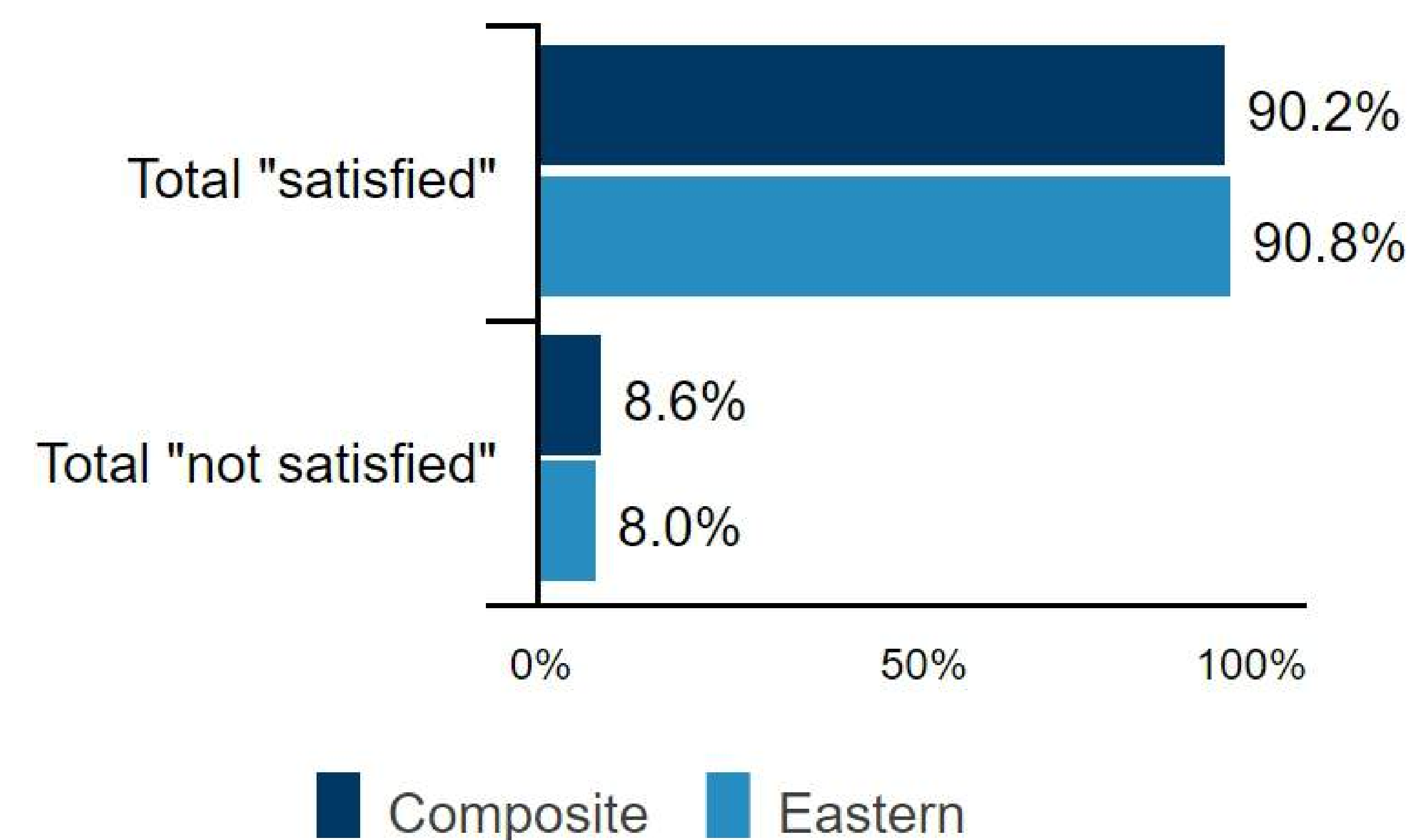
## Website Satisfaction



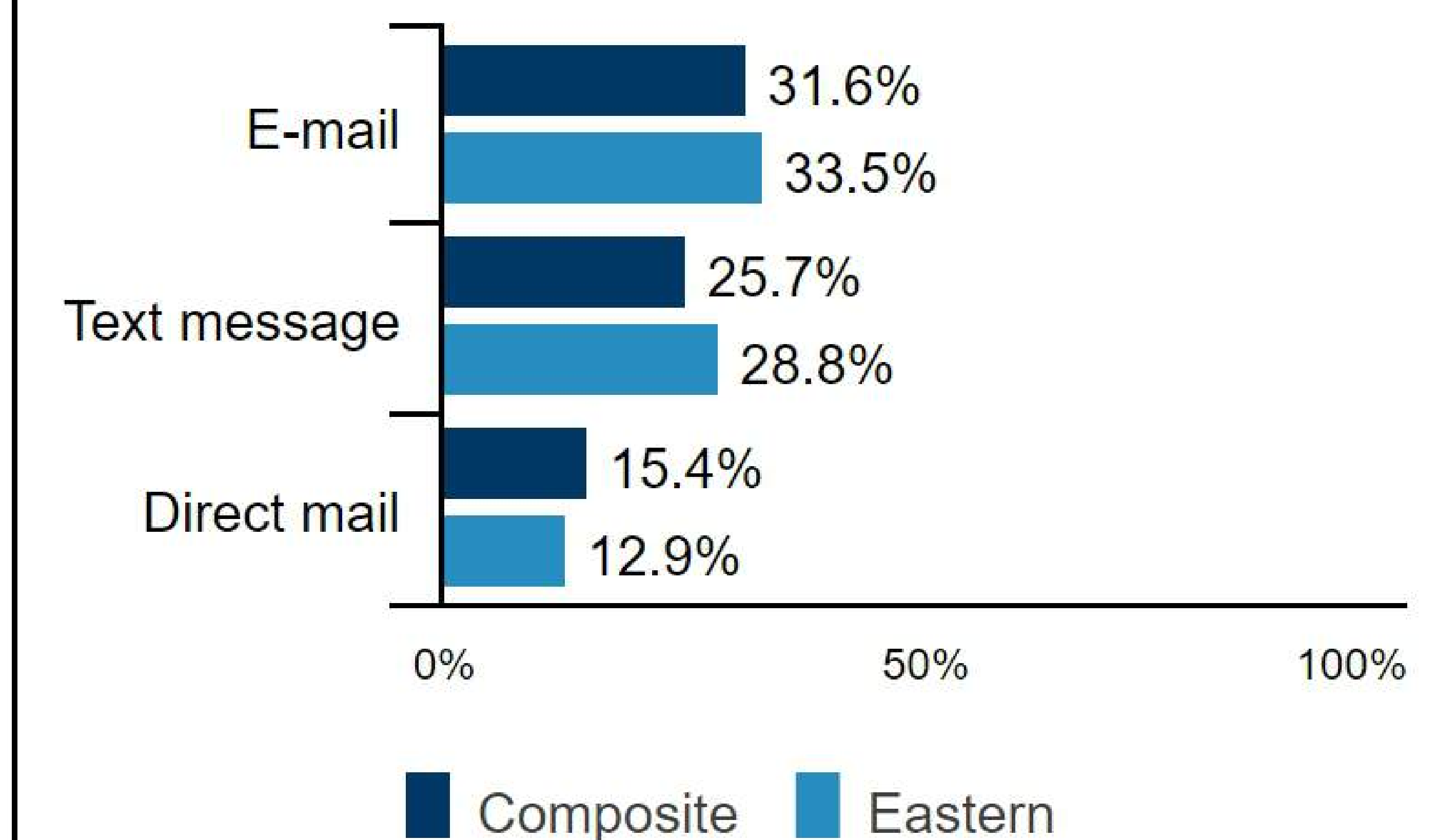
## Interest in Mobile Ticketing



## Online Booking Satisfaction



## Preferred Communication Methods

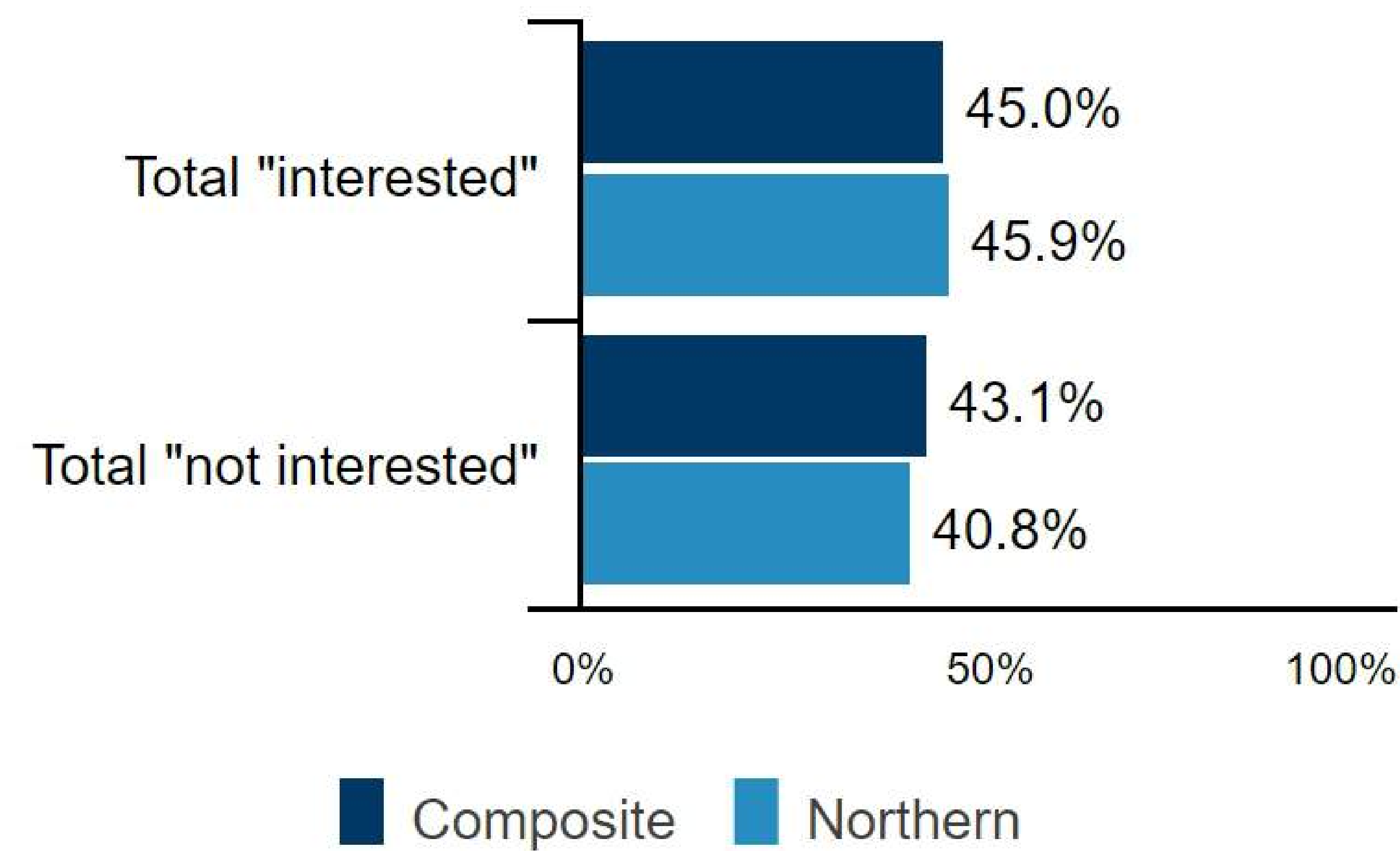




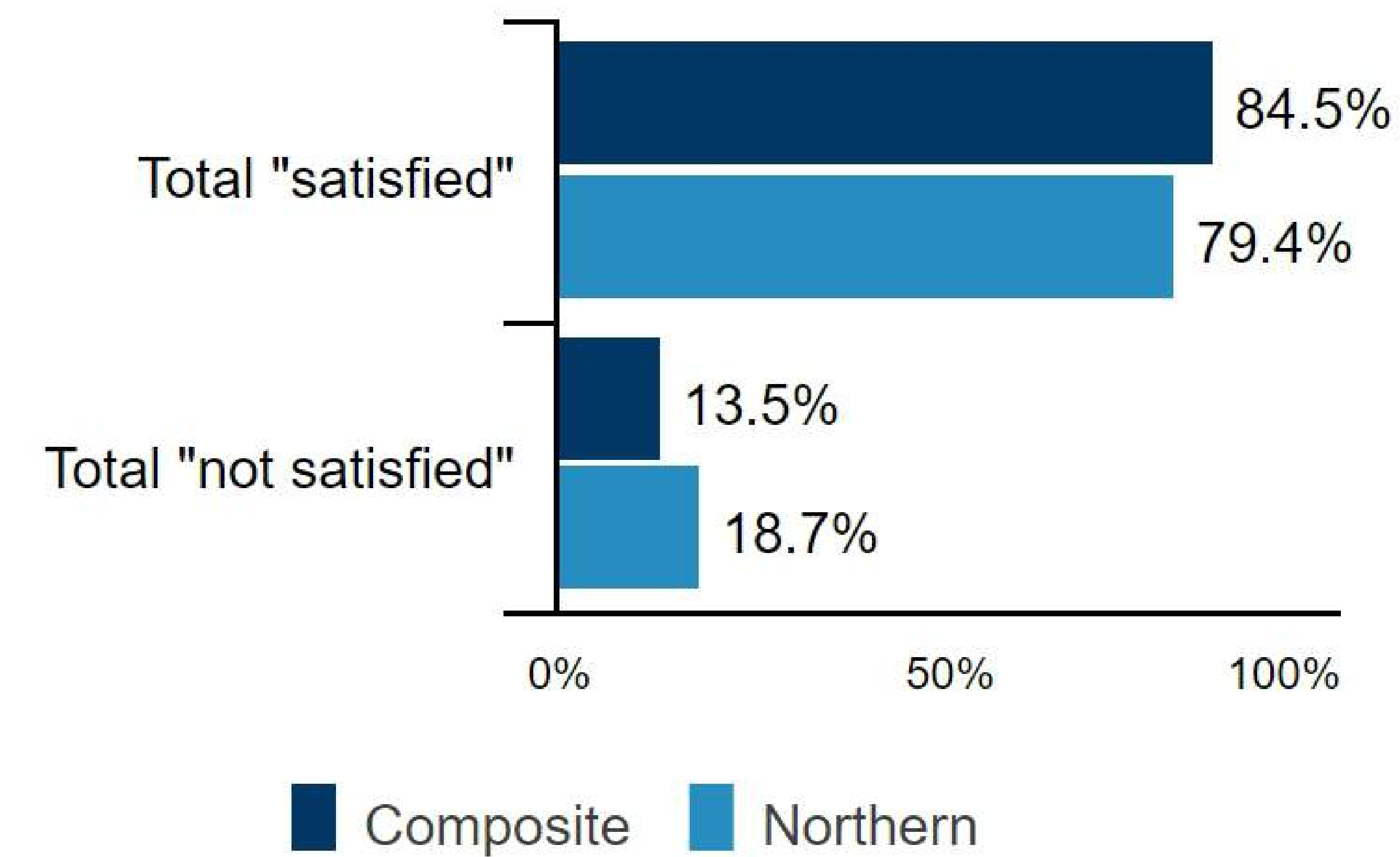
# Regional Snapshot | Northern



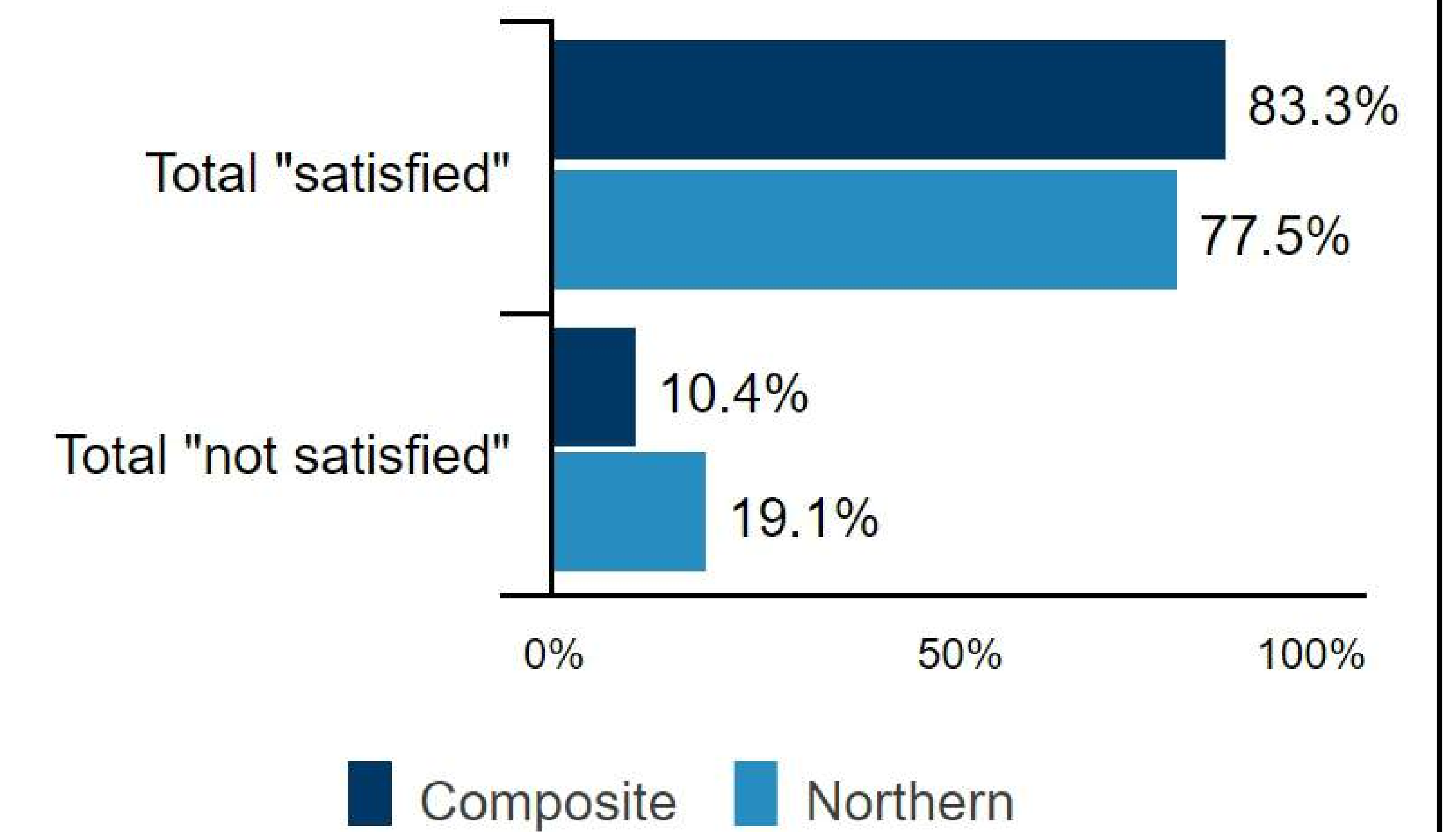
## Interest in Autonomous Vehicles



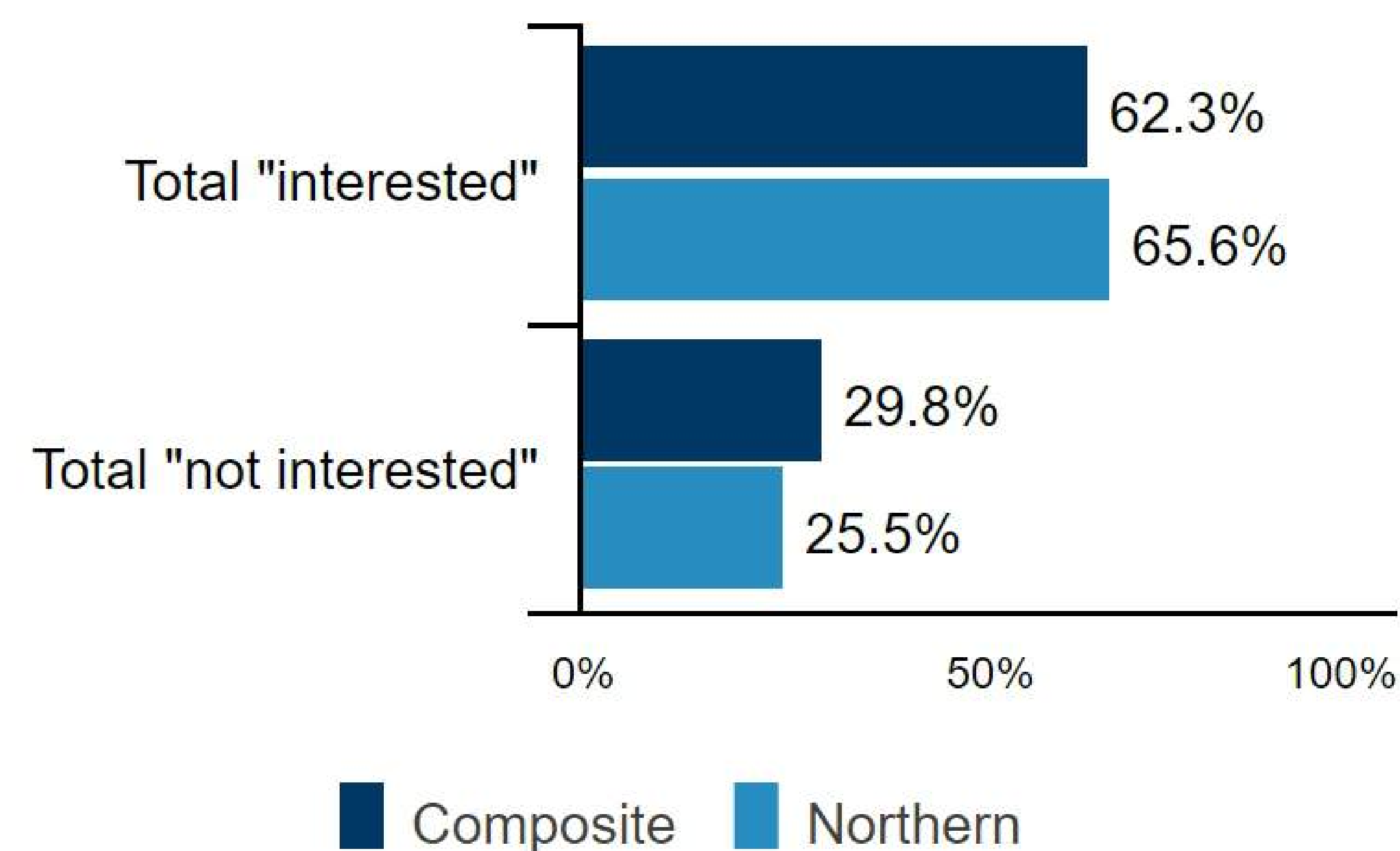
## Where's My Ride Satisfaction



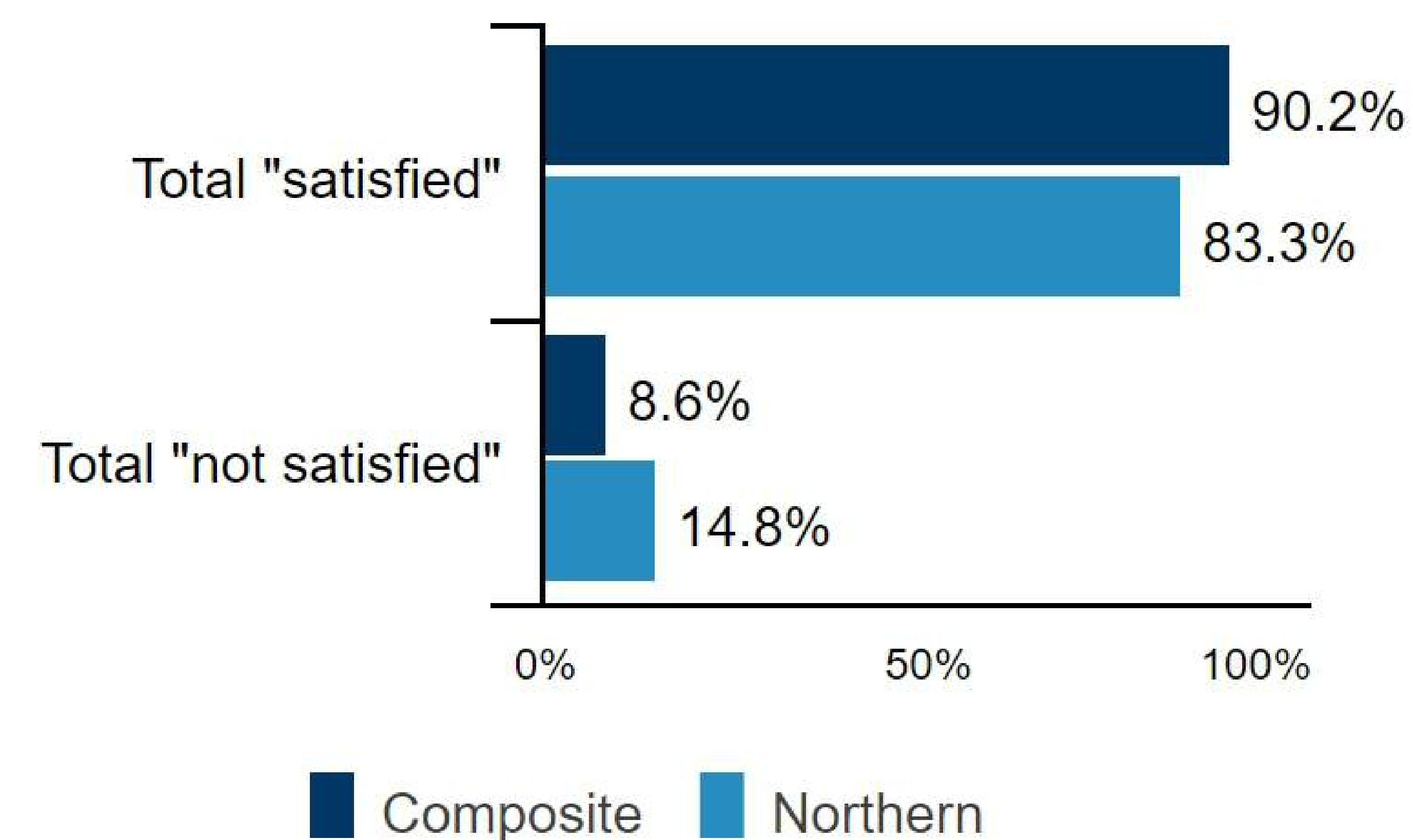
## Website Satisfaction



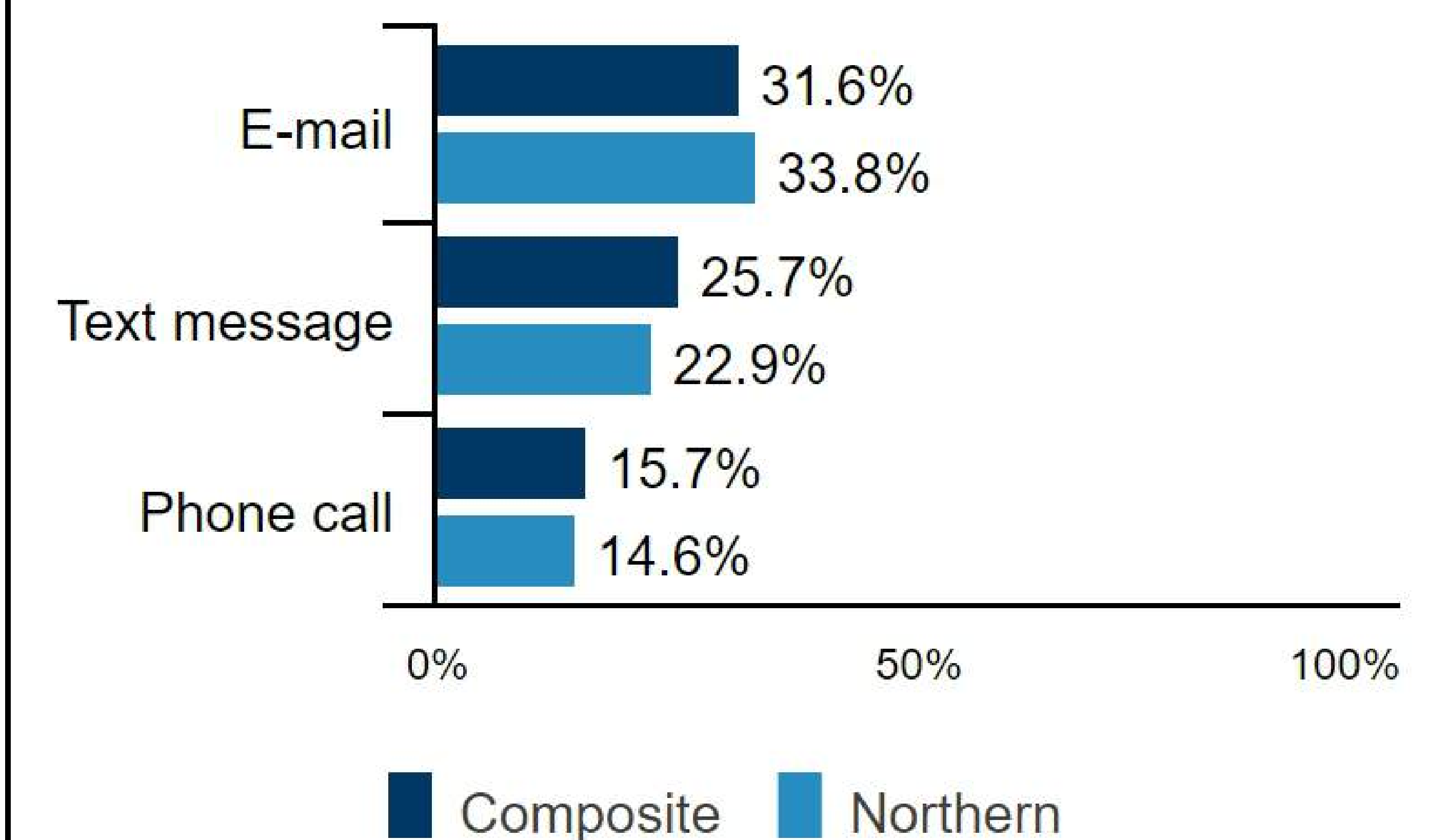
## Interest in Mobile Ticketing



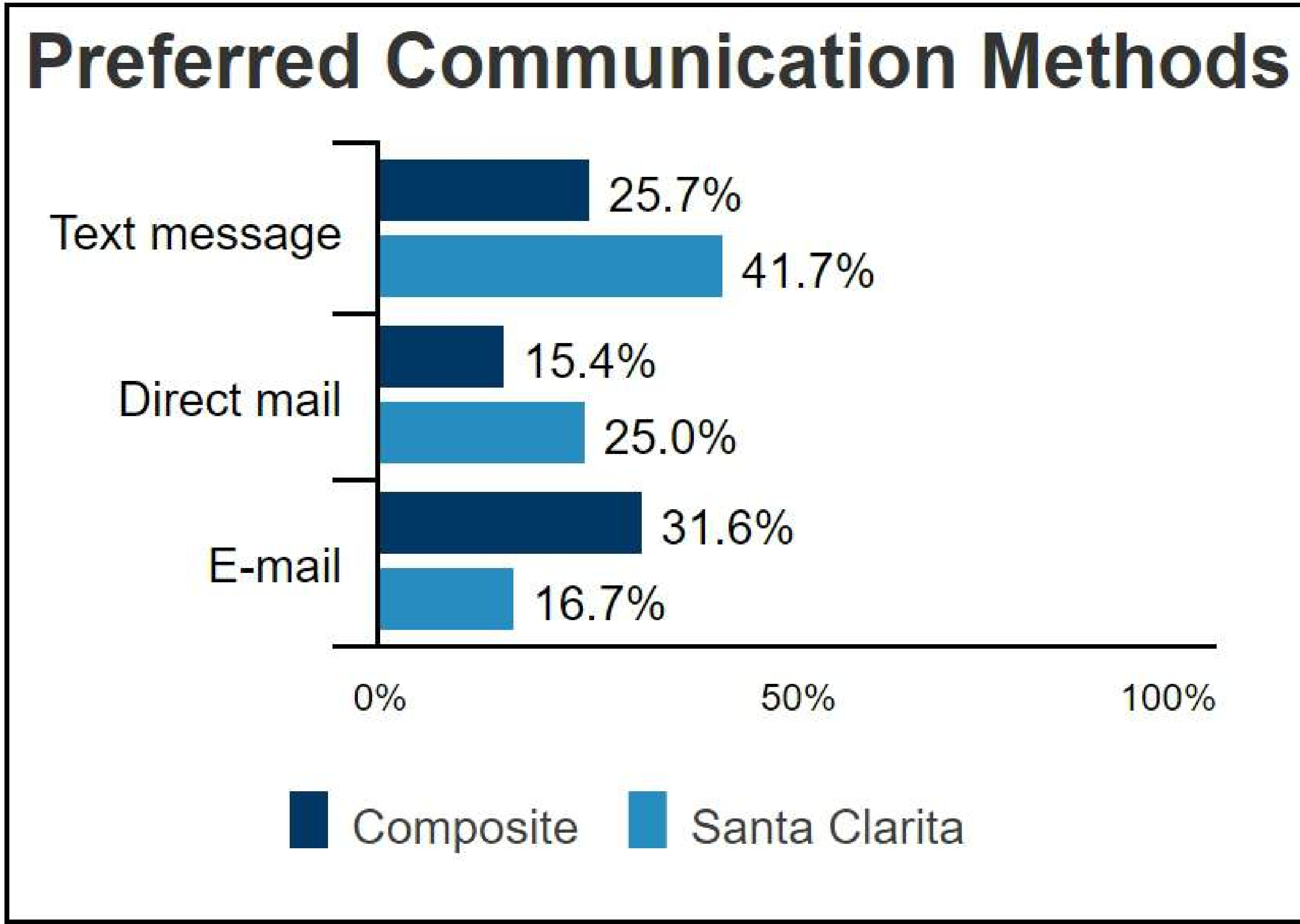
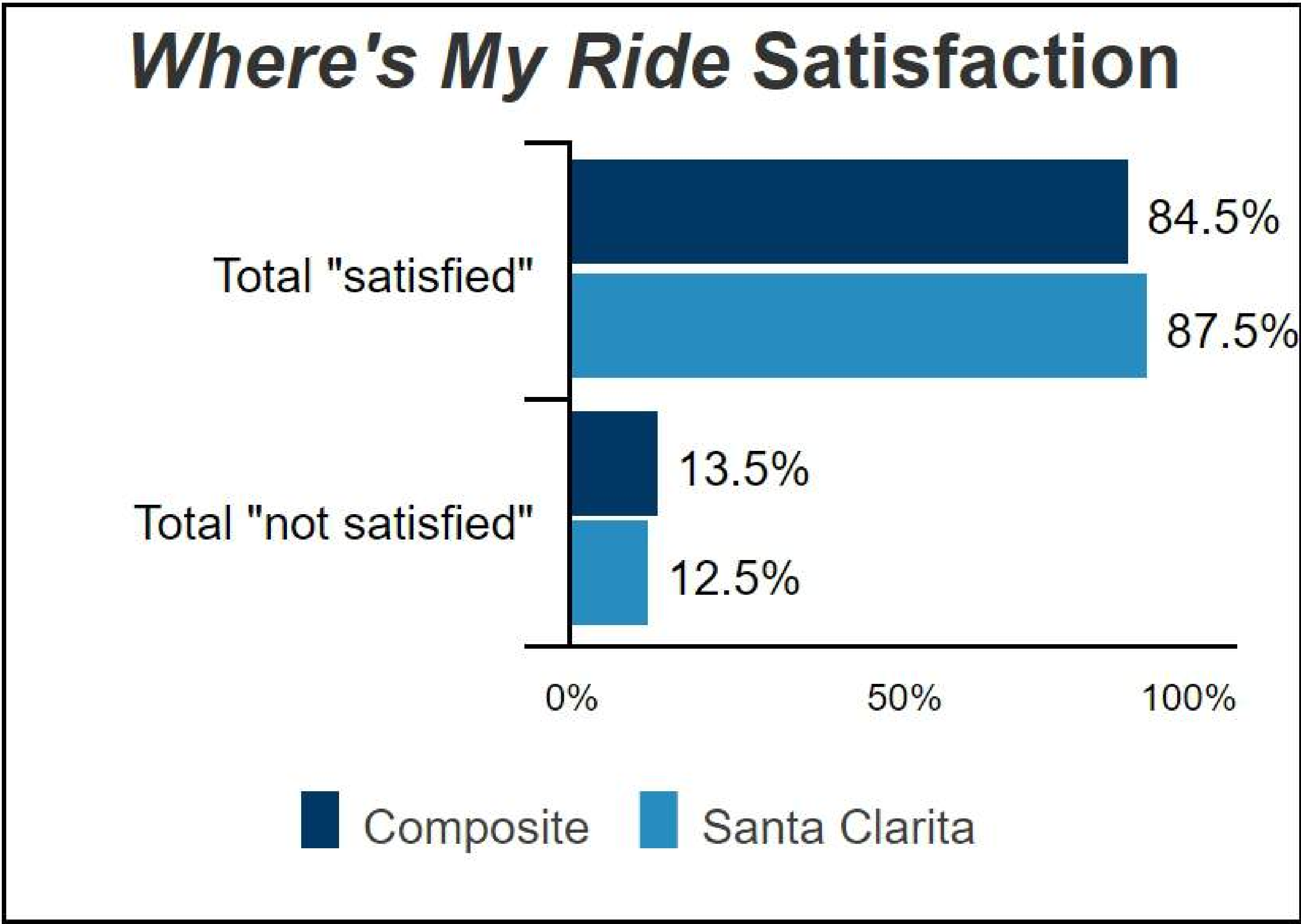
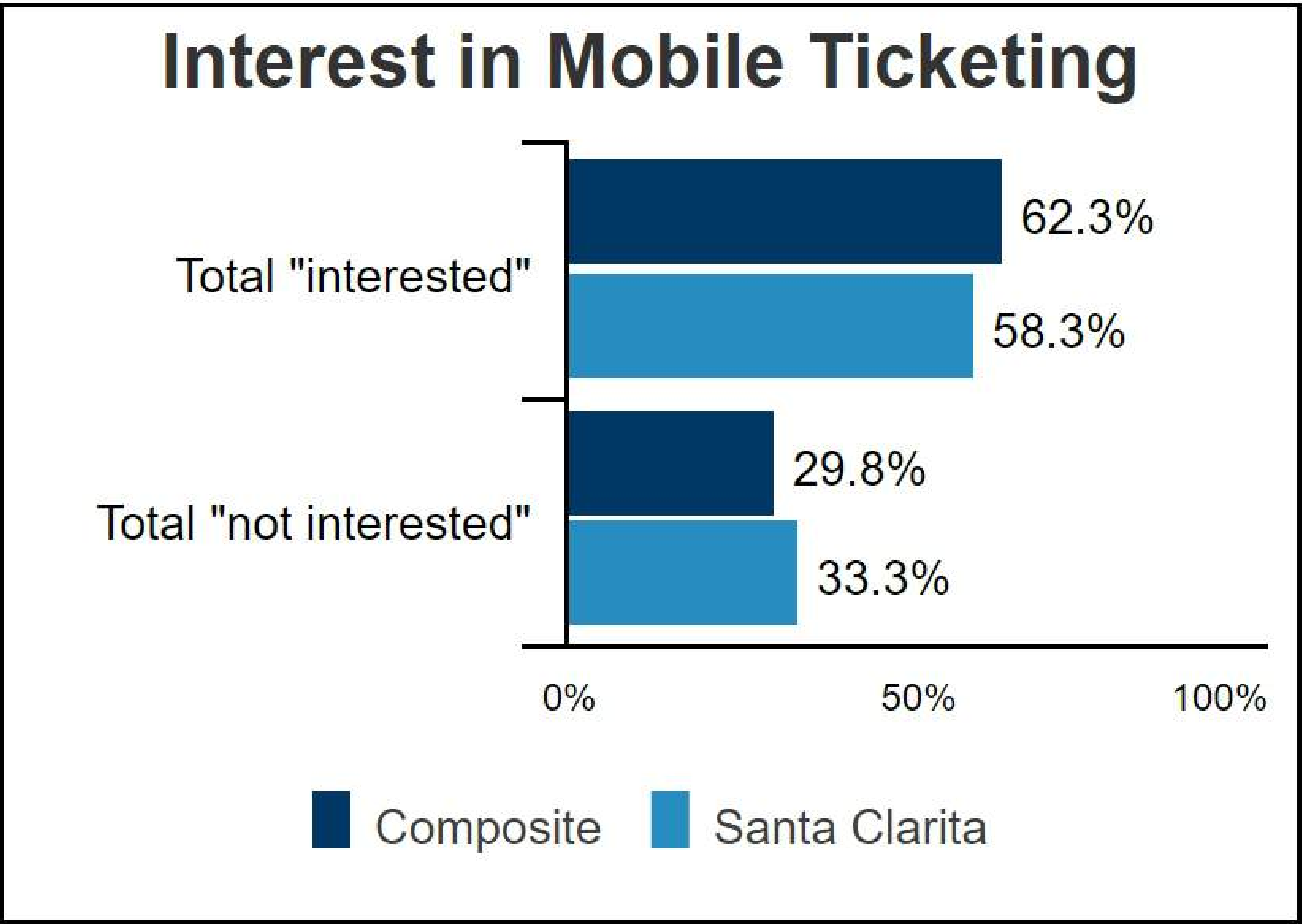
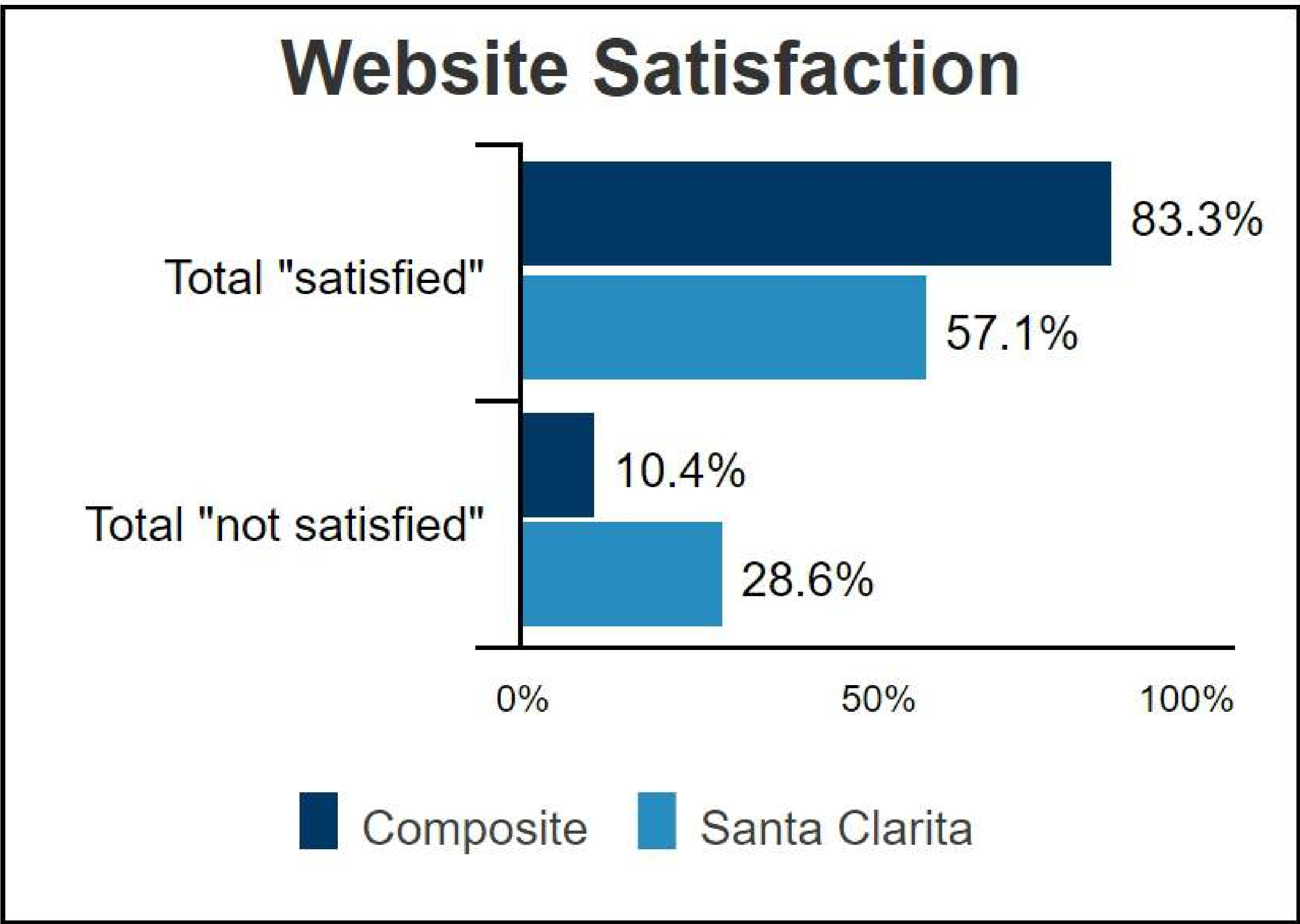
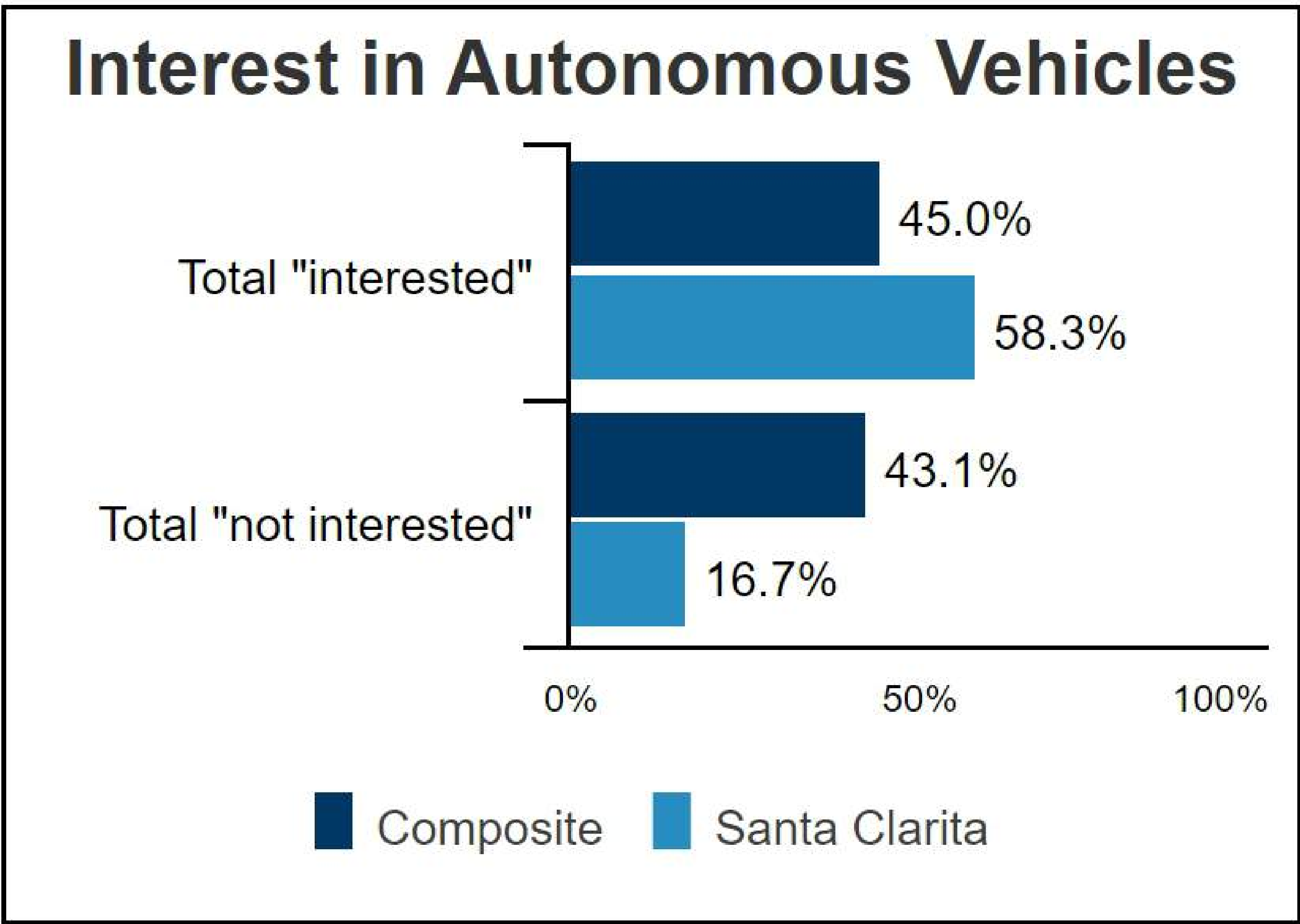
## Online Booking Satisfaction



## Preferred Communication Methods





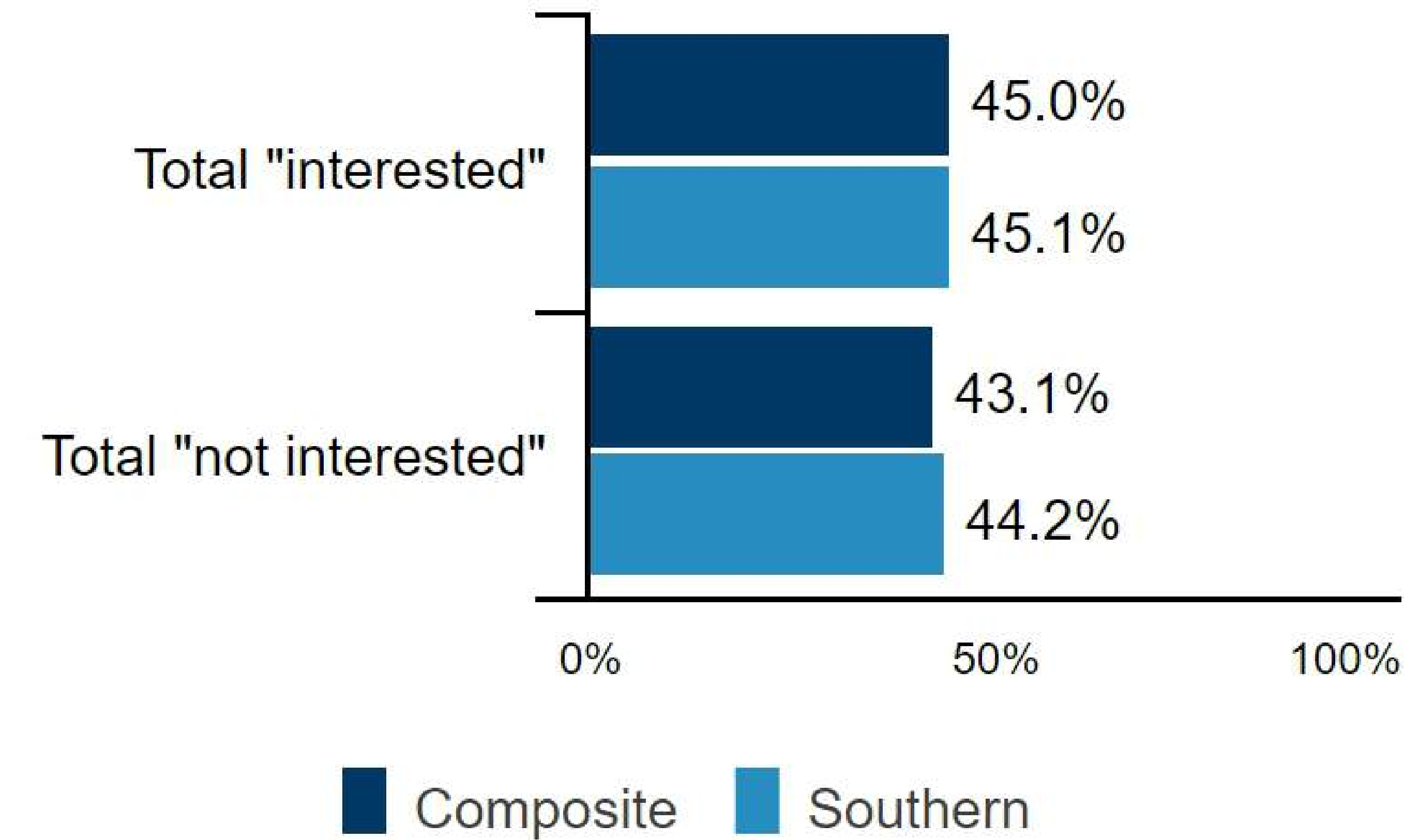




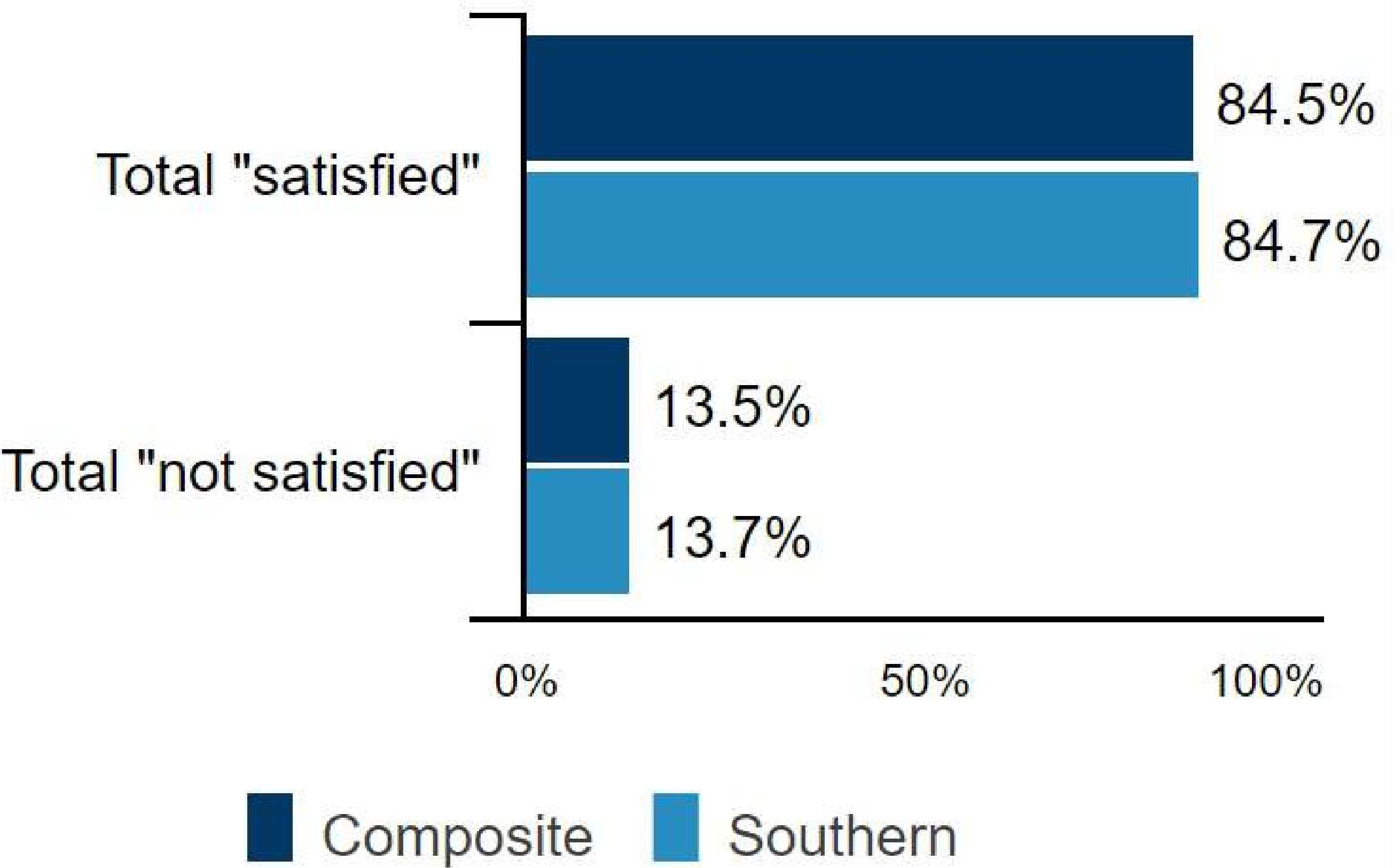
# Regional Snapshot | Southern



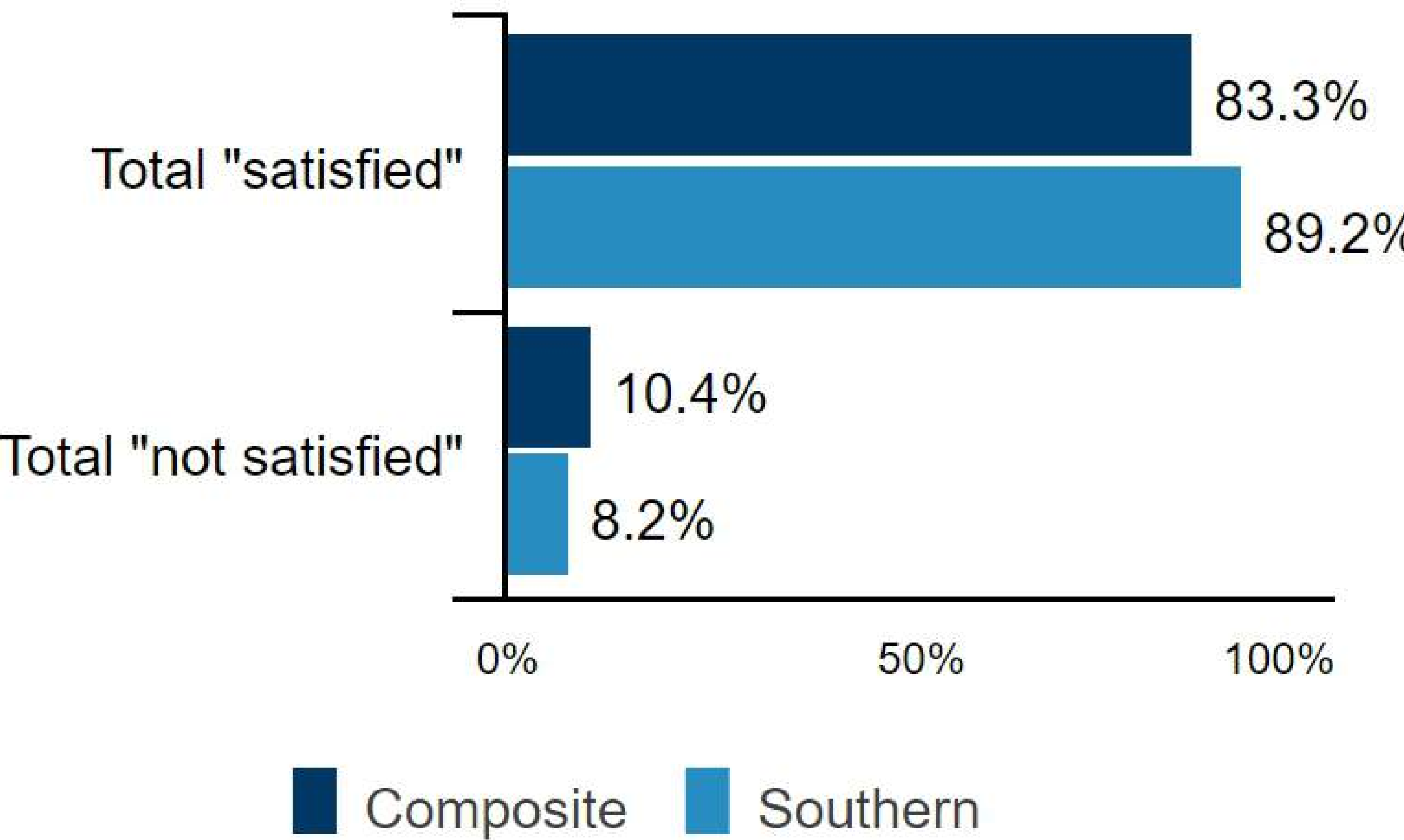
## Interest in Autonomous Vehicles



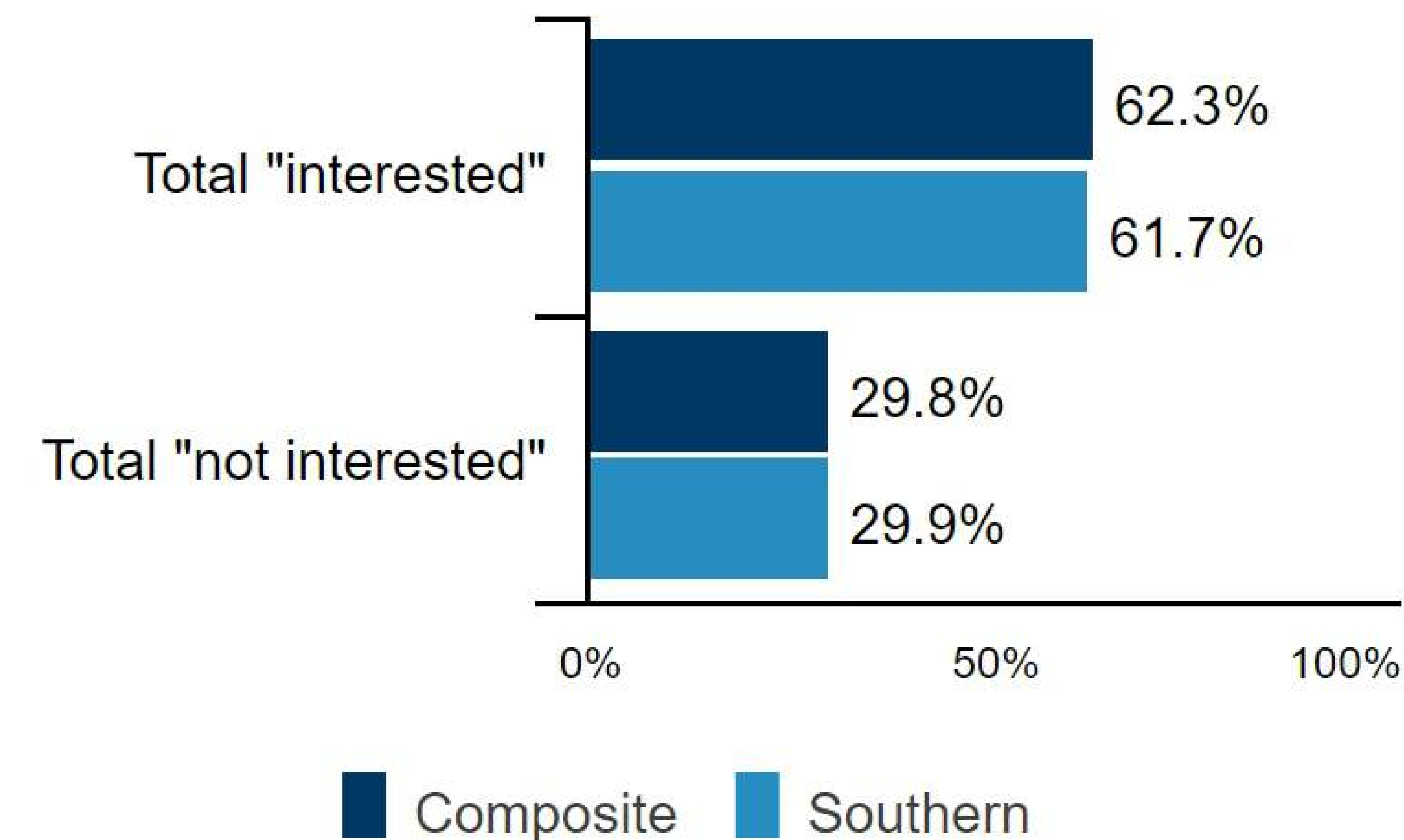
## Where's My Ride Satisfaction



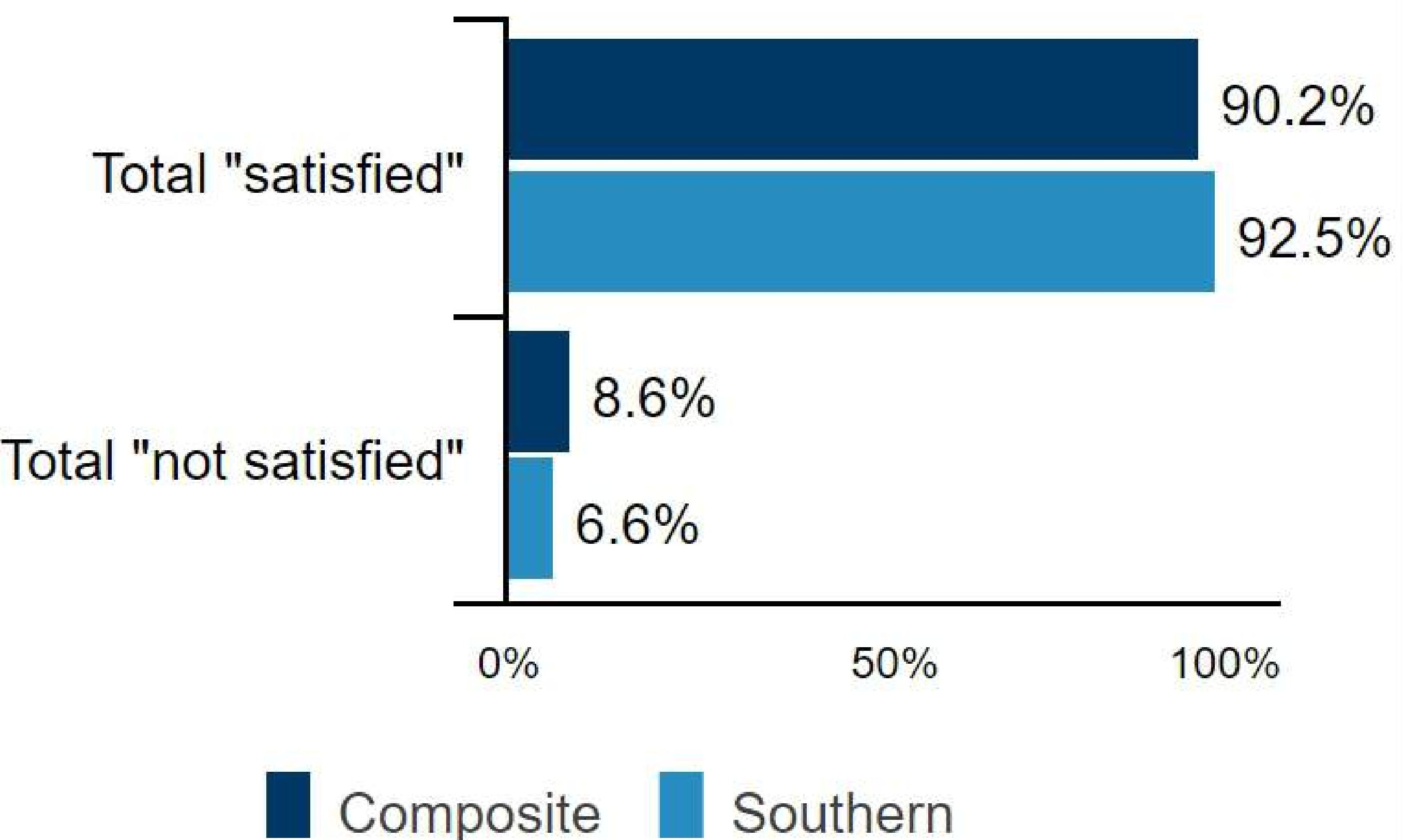
## Website Satisfaction



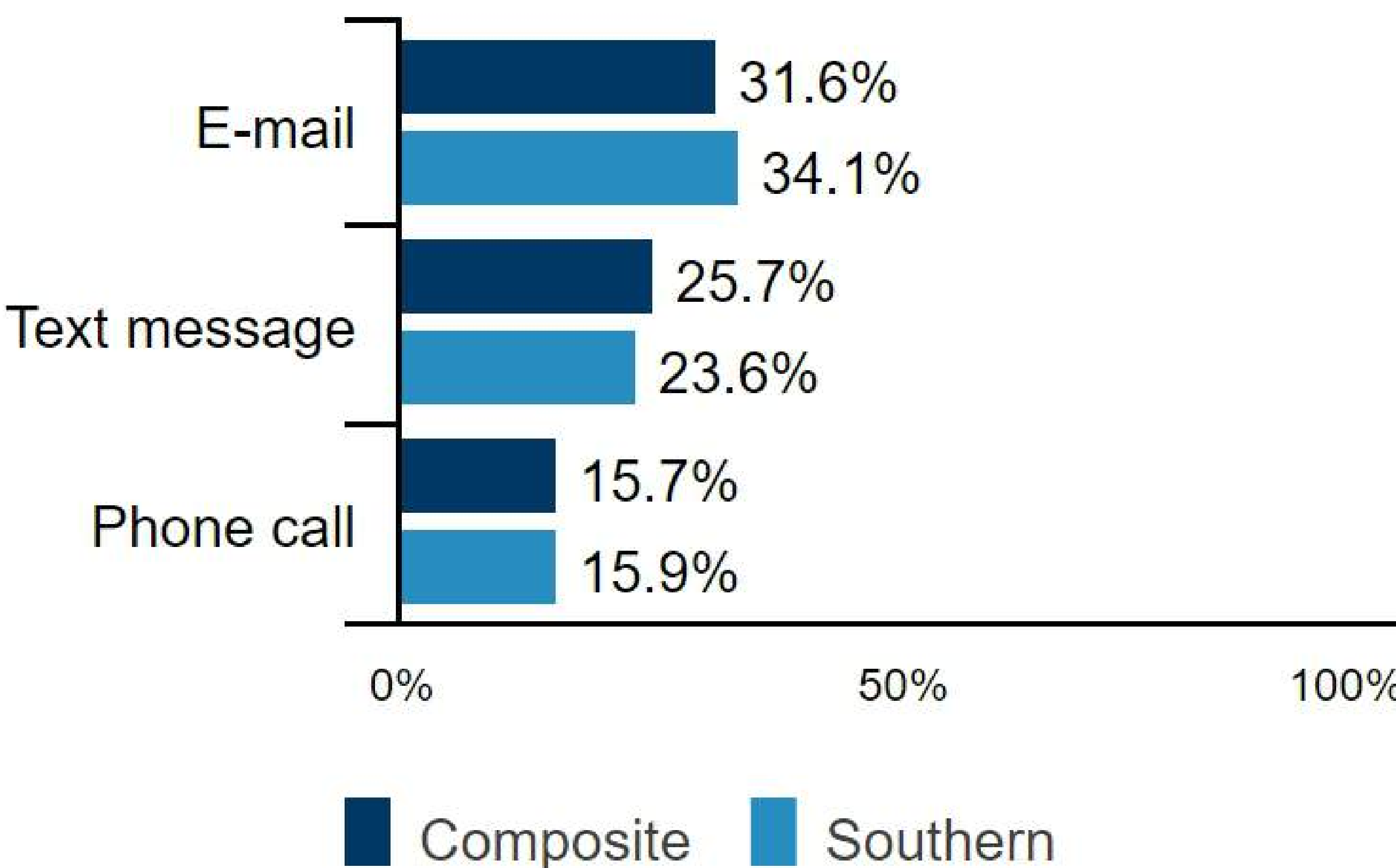
## Interest in Mobile Ticketing



## Online Booking Satisfaction



## Preferred Communication Methods

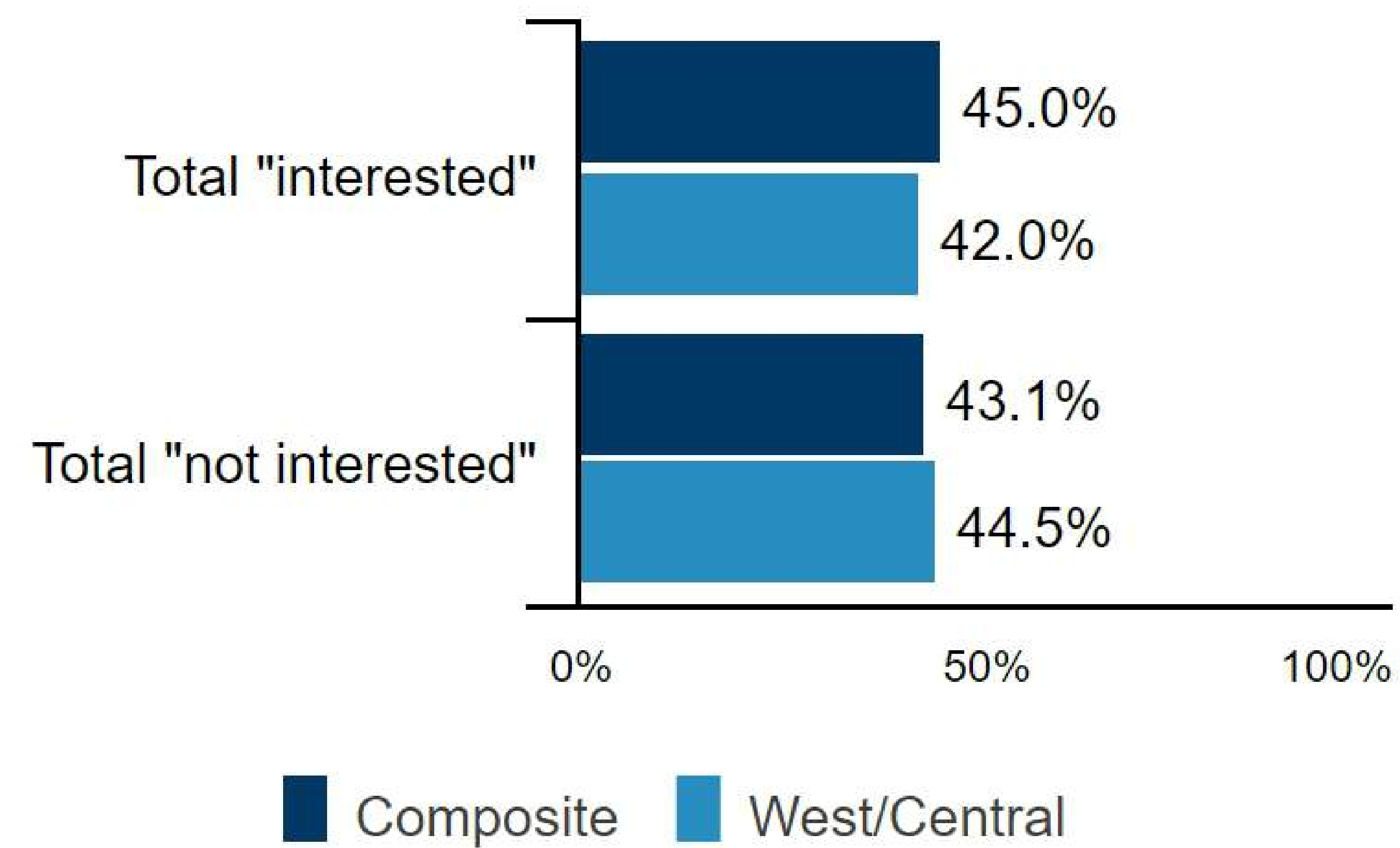




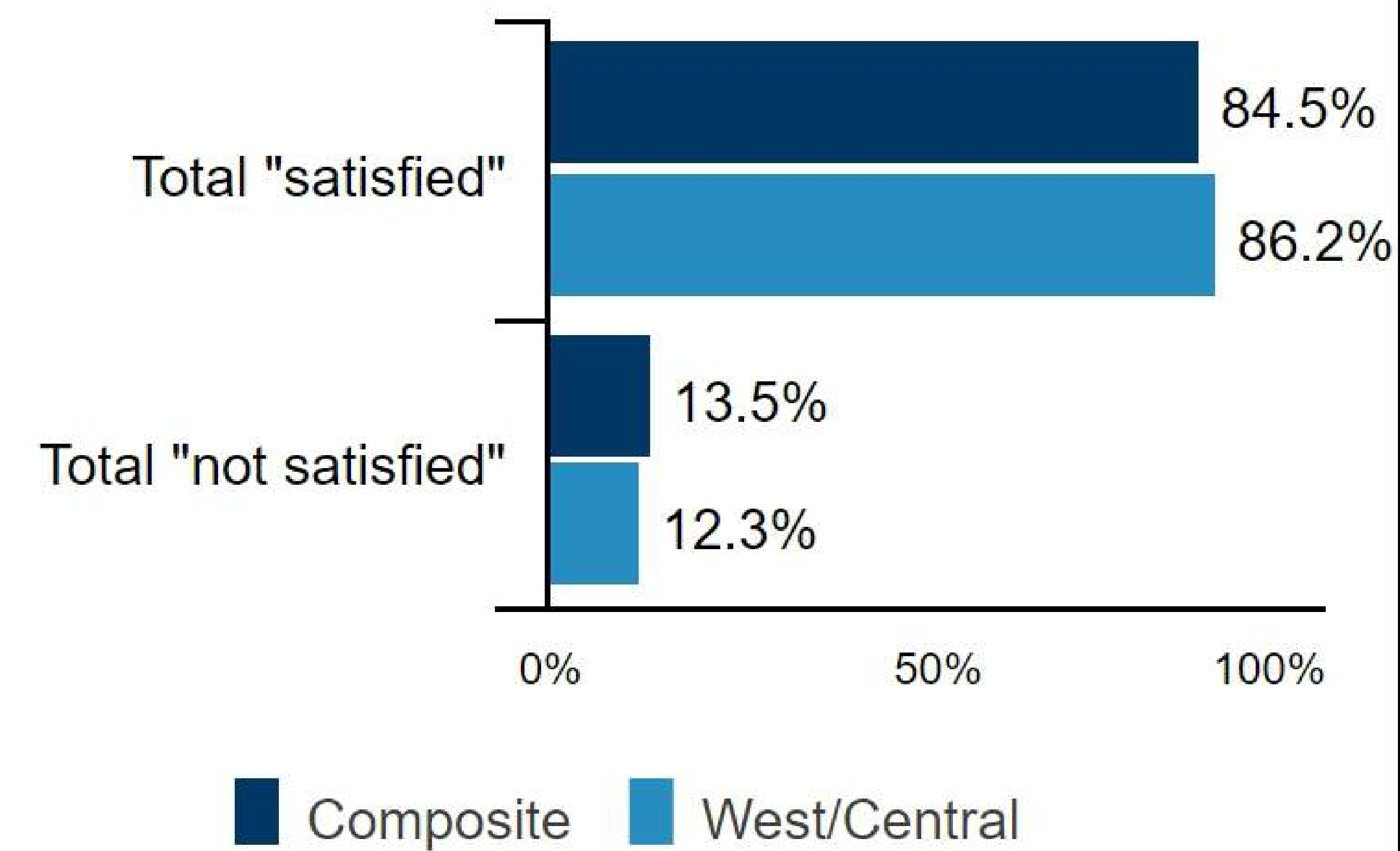
# Regional Snapshot | West / Central



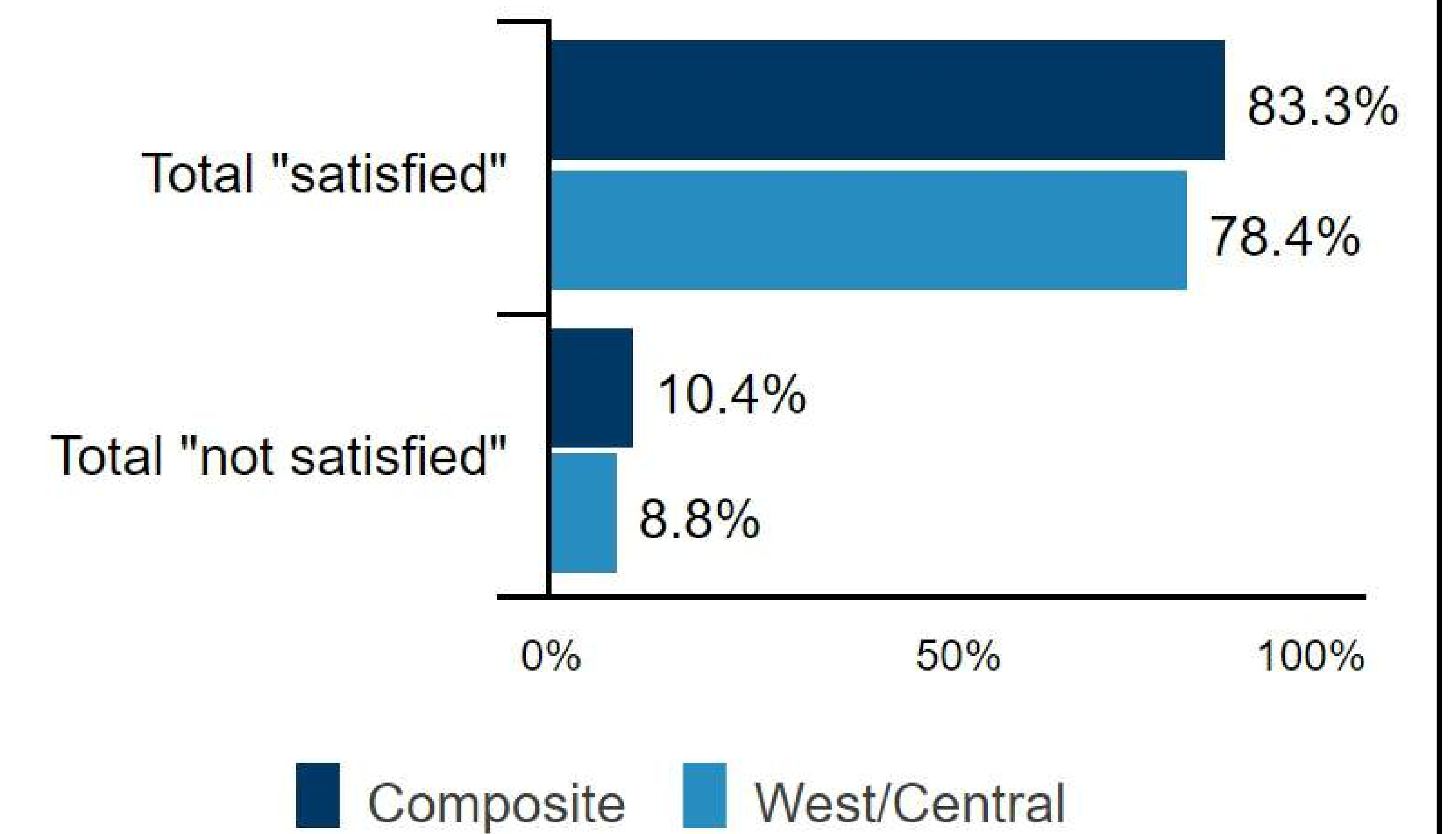
## Interest in Autonomous Vehicles



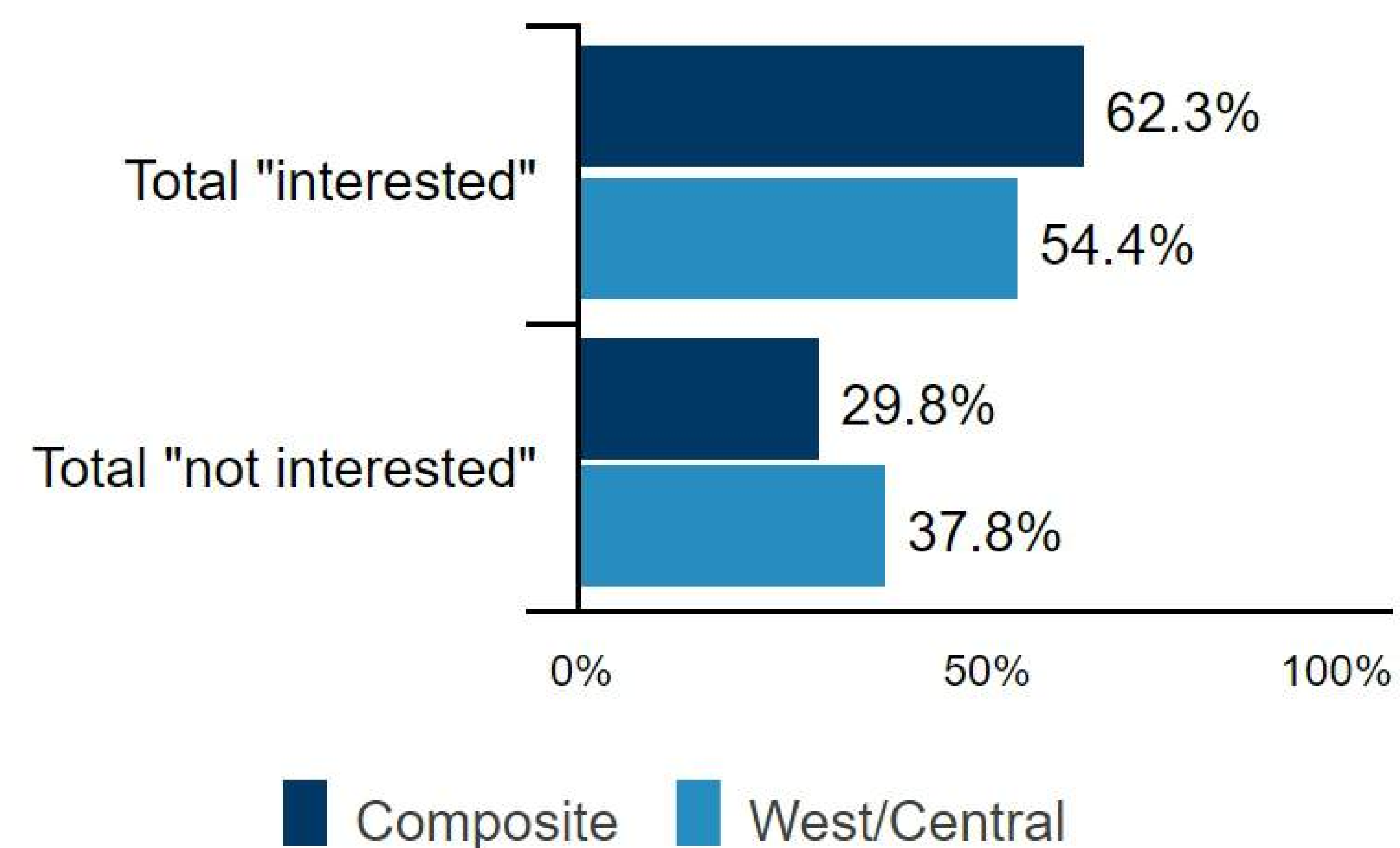
## Where's My Ride Satisfaction



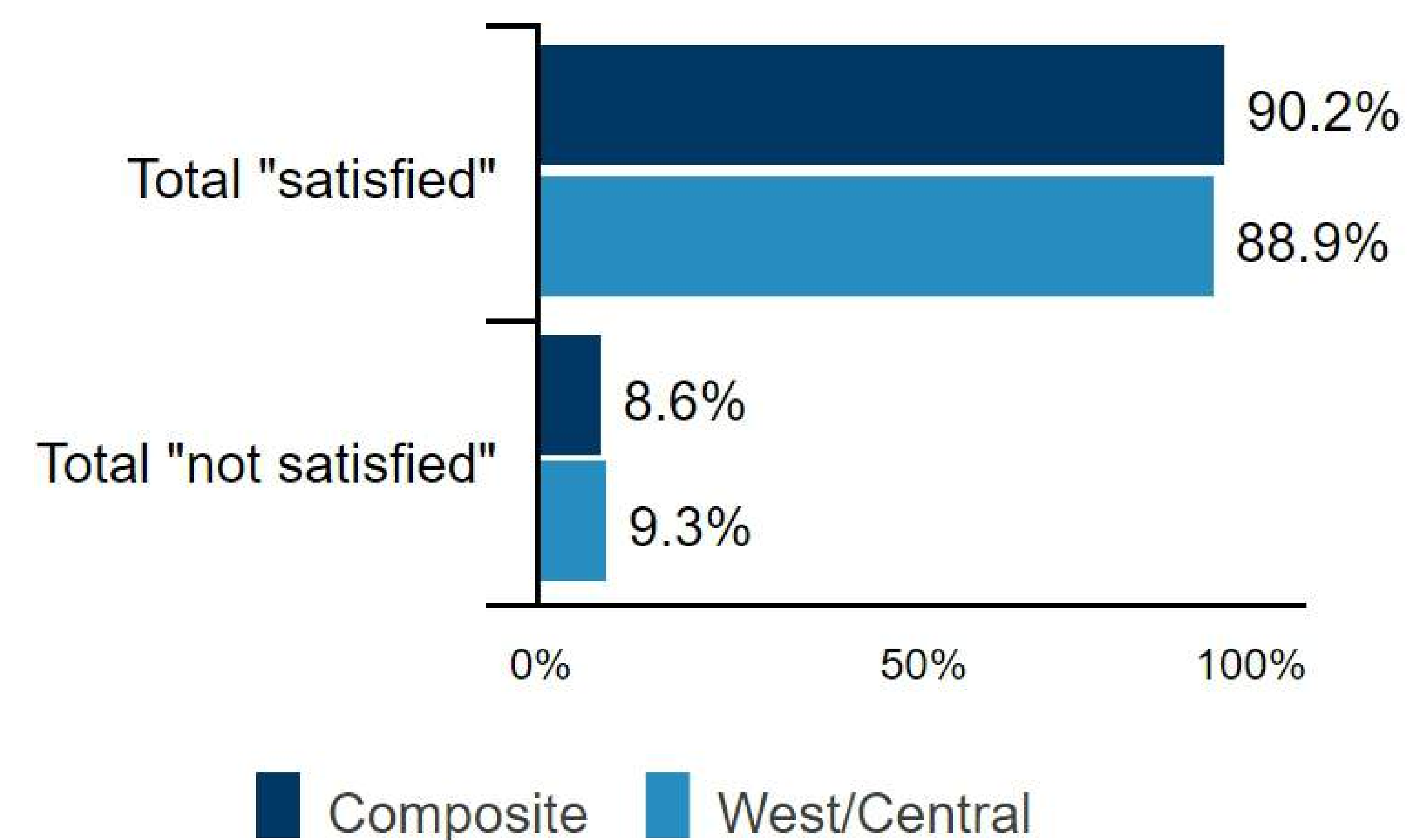
## Website Satisfaction



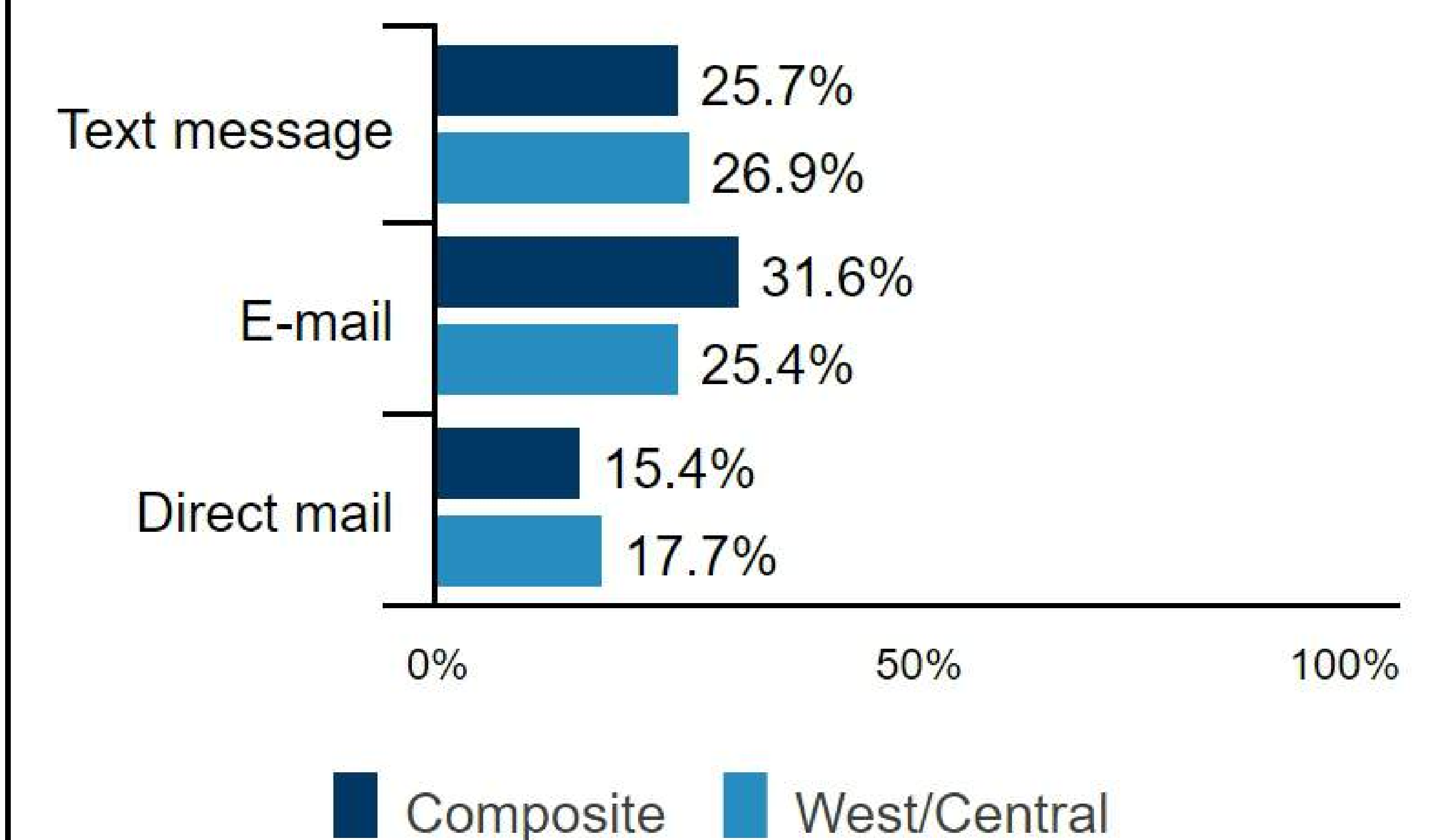
## Interest in Mobile Ticketing



## Online Booking Satisfaction



## Preferred Communication Methods





# Considerations





## Enhance & Expand Digital Service Options

Access riders are increasingly utilizing digital service options such as the *Where's My Ride* mobile app, the online booking platform, and the Access Services website, while satisfaction with these services has remained on par or increased slightly despite the higher usage. This indicates a growing demand for accessible, reliable, and easy-to-use digital tools. Notably, nearly three-fifths of respondents (59.2%) reported using the *Where's My Ride* app (+13.4 percentage points from 2021), over two-fifths (44.8%) reported using the online booking platform (+23.0 percentage points from 2021), and, moving forward, nearly two-thirds of respondents (62.3%) expressed interest in a mobile ticketing option to enable pre-payment and remote payment for rides.

### Actionable Insights:

- Continue to improve and promote the *Where's My Ride* mobile app and online booking platform, with a focus on addressing the top areas of dissatisfaction, such as inaccurate information and booking limitations.
- Prioritize the development and rollout of a mobile ticketing solution, given strong rider interest and the opportunity to streamline payment processes.
- Monitor and address regional variations in interest, such as the Santa Clarita region's noted higher interest in online reservations and automatic wheelchair securement options.



## Prepare for the Future of Autonomous Vehicles

Awareness and comfort with autonomous vehicles among Access Services riders remain moderate, while both comfort in riding in an autonomous vehicle and interest have declined since 2021. Over two-fifths of respondents (43.6%) reported being comfortable boarding an autonomous vehicle (-6.8 percentage points from 2021), and 45.0% reported interest in utilizing these vehicles for transportation (-10.6 percentage points from 2021). However, there is still notable engagement potential, as two-fifths of respondents (40.9%) expressed willingness to participate in a focus group to assist in the development of accessible autonomous vehicles.

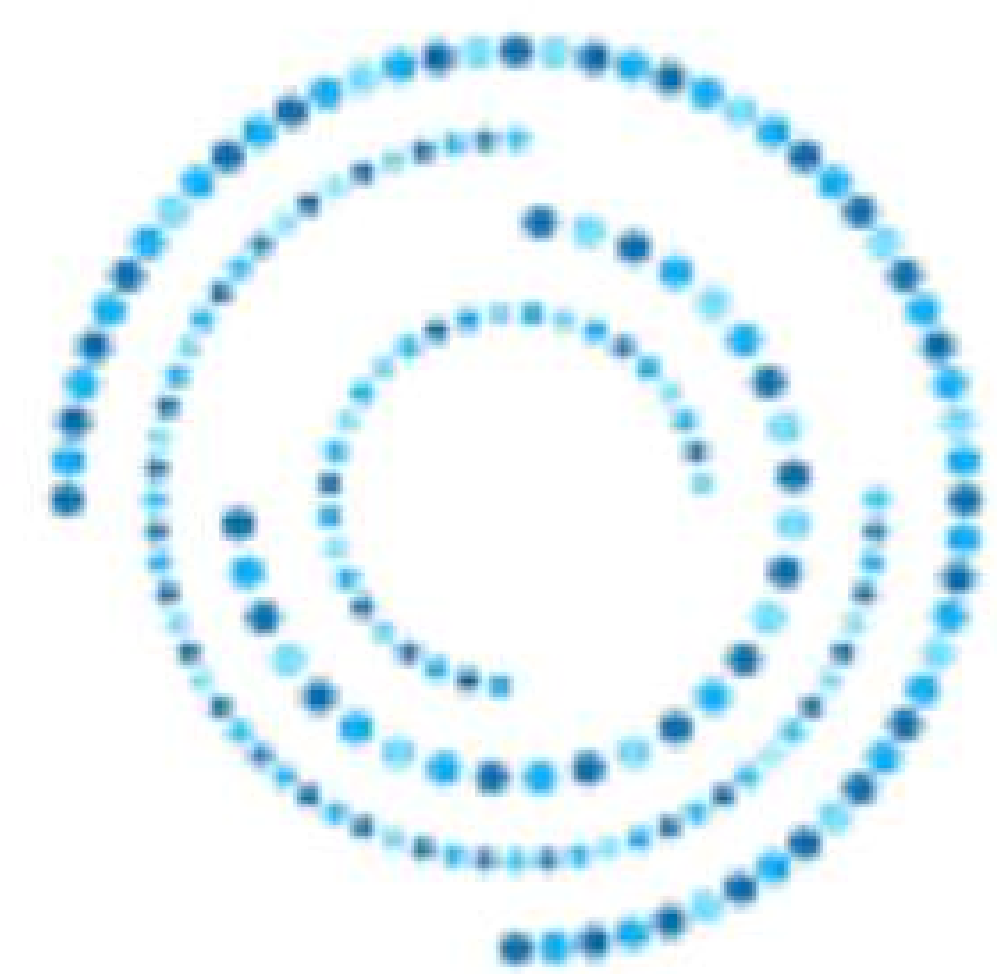
### Actionable Insights:

- Invest and/or continue to invest in targeted education and communication campaigns to raise familiarity and confidence in autonomous vehicle technology, emphasizing safety, accessibility, and reliability.
- Engage interested riders through focus groups and pilot programs to incorporate user-driven design features and feedback early in development.
- Monitor ongoing trends in autonomous vehicle acceptance to anticipate future rider needs and adjust messaging or service development accordingly.



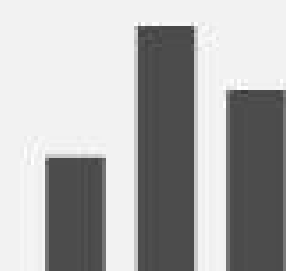
# About GreatBlue







# Harnessing the Power of Data

...to help clients achieve organizational goals.

 **Data** supporting strategic decisions to improve products and services. Since 1979, our experience with study and instrument design, data collection, analysis, and formal presentation assists our clients in identifying the “why” and “what’s next.”

 **Talent** with a knowledge base in a wide range of industries and methodologies ensures a 360° view of the challenges faced and the expertise to address them.

 **Solutions** that are customized to provide a personalized approach to understanding organizational, employee, and customer needs, allowing for more informed decisions.

## Methodologies:



Digital Surveys



Focus Groups



In-Depth Interviews

## Studies:



Awareness and Perception Studies



Customer and Employee Satisfaction Studies



Journey Mapping



Creative and New Concept Testing



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