

Blue Ribbon Task Force Transit Recovery & Transformation: Research Overview & Results



EMC Research, Bay Area Council, & MTC Staff
May 27, 2021

Return to Transit Campaign Update

- ▶ MTC and transit operator marketing staff are developing a Return to Transit Communication Campaign that will include print, digital, social media and audio advertising.
- ▶ Craft + Commerce, MTC's marketing contractor, developed five campaign concepts that were narrowed down to three.
- ▶ EMC Research is message testing the three concepts; Imprenta Communications, an ethnic communications firm, is testing the concepts in Spanish, Chinese, Vietnamese and Tagalog.
- ▶ Testing will be completed in early June. The three campaigns will be narrowed down to one.
- ▶ Campaign will be built out by early July and promoted in summer or fall.

Blue Ribbon Research Overview

- ▶ Since mid-2020, EMC Research and Bay Area Council have been providing public opinion and employer research support
- ▶ Research efforts have included:
 - Two reviews of prior opinion research conducted in the Bay Area
 - Two rounds of community focus groups (most recent round in April, in English, Spanish, Cantonese, and with persons with disabilities)
 - Statistically valid random sample poll of 1,000 Bay Area residents (mid-April)
 - Employer focus groups and monthly return to workplace tracking surveys (April - September)
- ▶ Bay Area Resident Poll & Community Focus Groups designed to:
 - Understand transit perceptions and expectations for the future
 - Measure interest in more integrated Bay Area public transit & Seamless bill
 - Gauge reaction to issues addressed by network management

As with any opinion research, the release of selected figures from this report without the analysis that explains their meaning would be damaging to EMC. Therefore, EMC reserves the right to correct any misleading release of this data in any medium through the release of correct data or analysis.

Please note that due to rounding, percentages may not add up to exactly 100%.

Summary of Research Findings

- ▶ Bay Area residents, both transit riders and not, were not satisfied with public transit prior to the pandemic, and **they demand better and encourage that now is the time to act.** Reliability, frequency, ease of use, and personal safety on board are all viewed as inadequate.
- ▶ Most Bay Area residents (87%) believe public transit is important to the Bay Area. **Reliable, frequent, and safe transit for the Bay Area** is a priority for nearly everyone, whether they ride or not.
- ▶ Coordinated public transit that operates as a **seamless, multimodal transit system** for the Bay Area is overwhelmingly popular (89% support). Support is high across riders and non-riders, and all regions of the Bay Area.
- ▶ Bay Area residents all want the same things, including **real-time information**, better transit for **dependent populations**, more **direct service** with fewer transfers, a single **mobile app**, uniform **maps and signage**, a single **set of fares, passes, and discounts**, and a **regional network** that can set fares, align schedules, and standardize information.

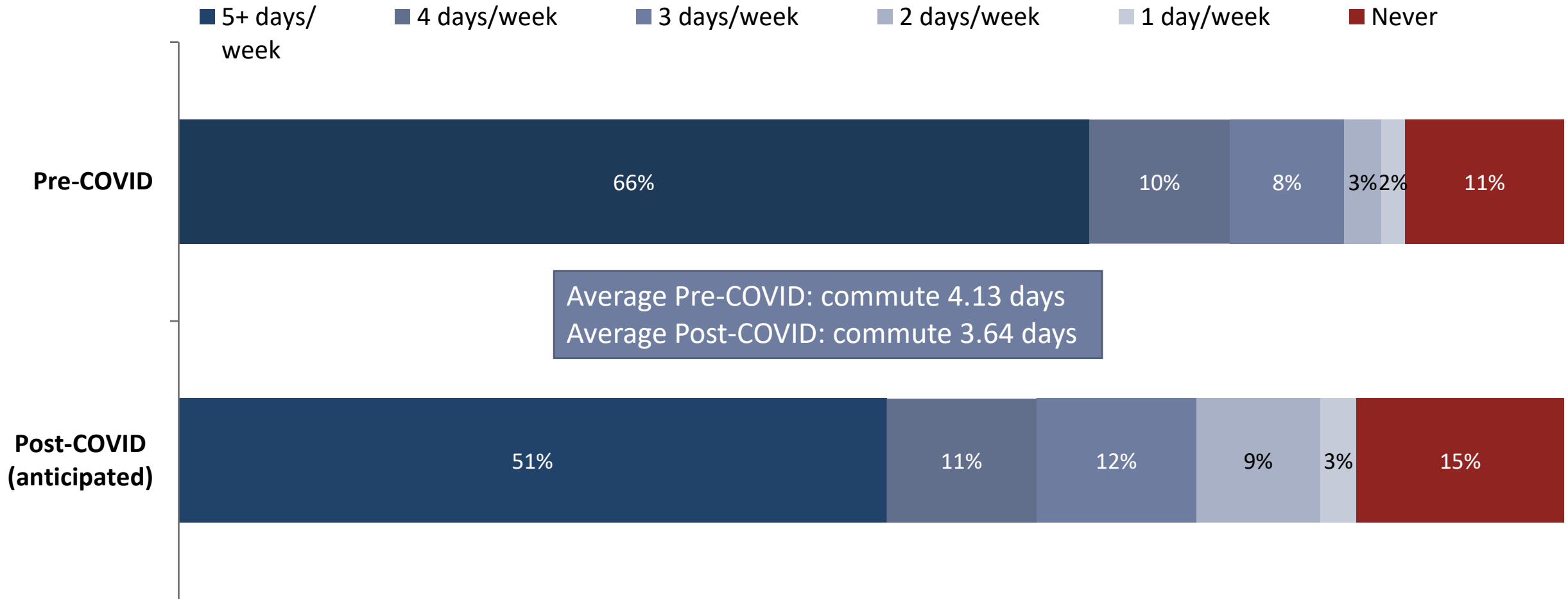


Commute Frequency & Transit Use

Commute Frequency *(all modes)*

Commuters anticipate heading to the workplace fewer days a week than they did prior to the pandemic.

(Among employed/students only – 69% of residents)



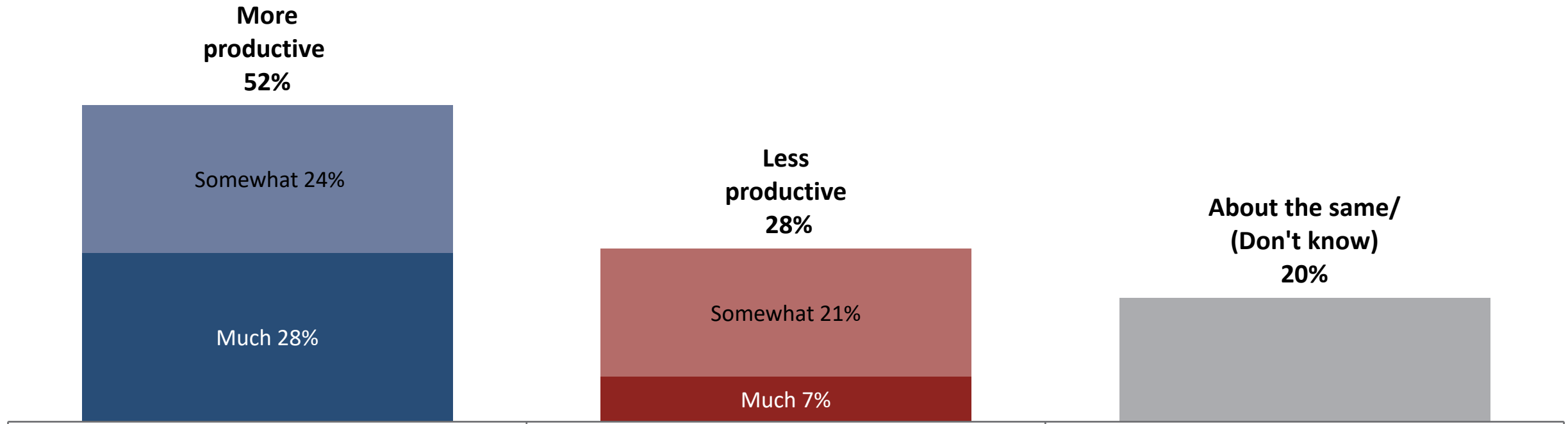
Q50, Q51 & Q52. [Before the pandemic/right now/after the COVID-19 pandemic ends] how many days per week [did/do/do you anticipate that you will] commute or go into a workplace?

Work from Home

There is evidence that employees are not particularly unhappy in their work at home environment.

How would you rate your productivity working at home?*

Among employed working from home always or sometimes; n=430



* Question from Bay Area Council Bay Area Poll – March 2021

Employer Return to Office



Employers surveyed are anticipating their employees will generally spend fewer days in the office post-COVID than they did prior.

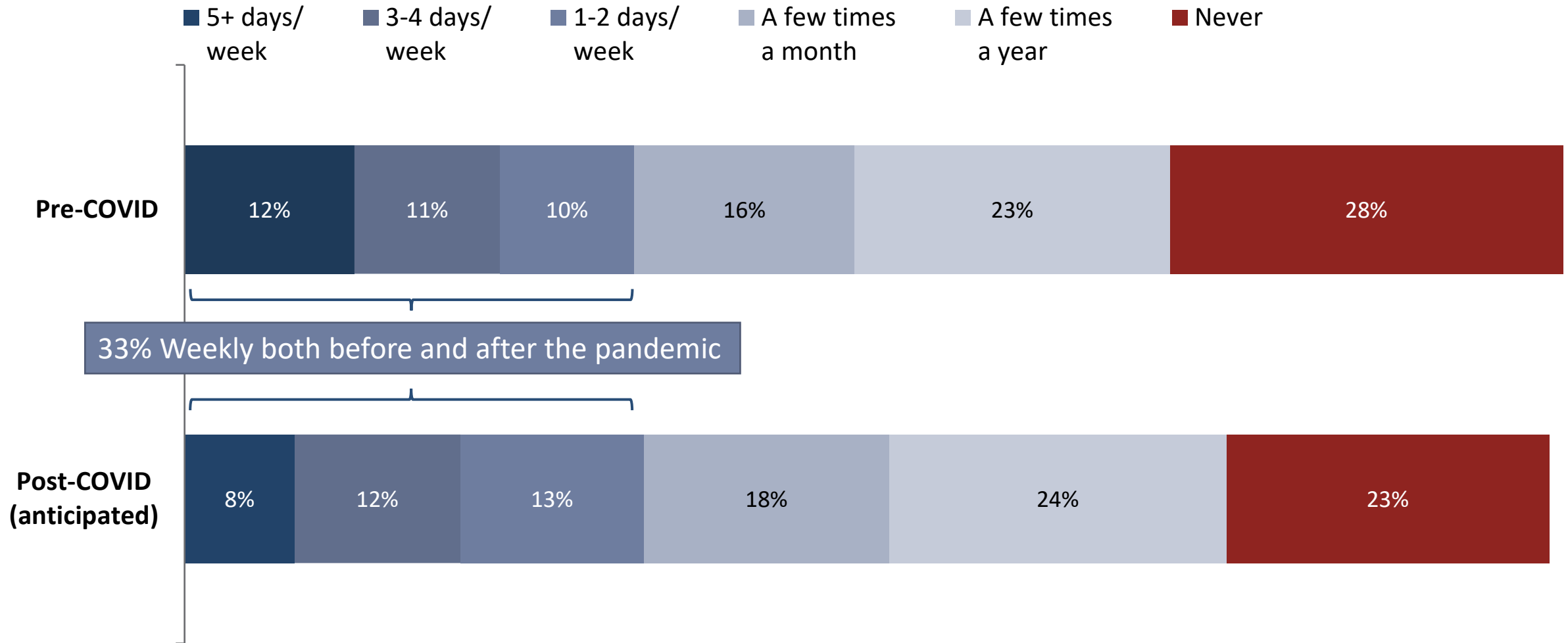
Most employers anticipate beginning to bring non-essential employees back to offices in late summer/early fall. A majority think their “new normal” will be in place by mid-fall, while about a third felt it might be closer to the end of the year, or even early 2022.

Most employers surveyed support the use of public transit as a way for their employees to commute to the workplace.

In addition to COVID safety concerns, employers want improved efficiencies in the transit system such as improved reliability, more service, and reduced wait times.

Transit Usage

The one-third of Bay Area residents that were regular transit riders before COVID anticipate returning, although maybe with less frequency.



Q45, Q47 & Q48. [Before the COVID-19 pandemic/currently/after the COVID-19 pandemic ends] how many days per week [did/do/do you think you will] take public transit?

Focus Groups: Transit & Commuting

Focus group participants generally felt they would return to transit when they went back to their regular activities.

“I imagine that there will be some sort of hybrid where I would need to go back and be in person. But I don't imagine that it would be every day. **I think it would probably be like twice a week or maybe three times.**”

-- Pre-pandemic transit rider



“Once I feel that everything is safe, I will be going back to using the Caltrain, not as often, just because our workplace has expressed the idea of maybe doing **part-time remote and then part-time in the office.**”

-- Pre-pandemic transit rider

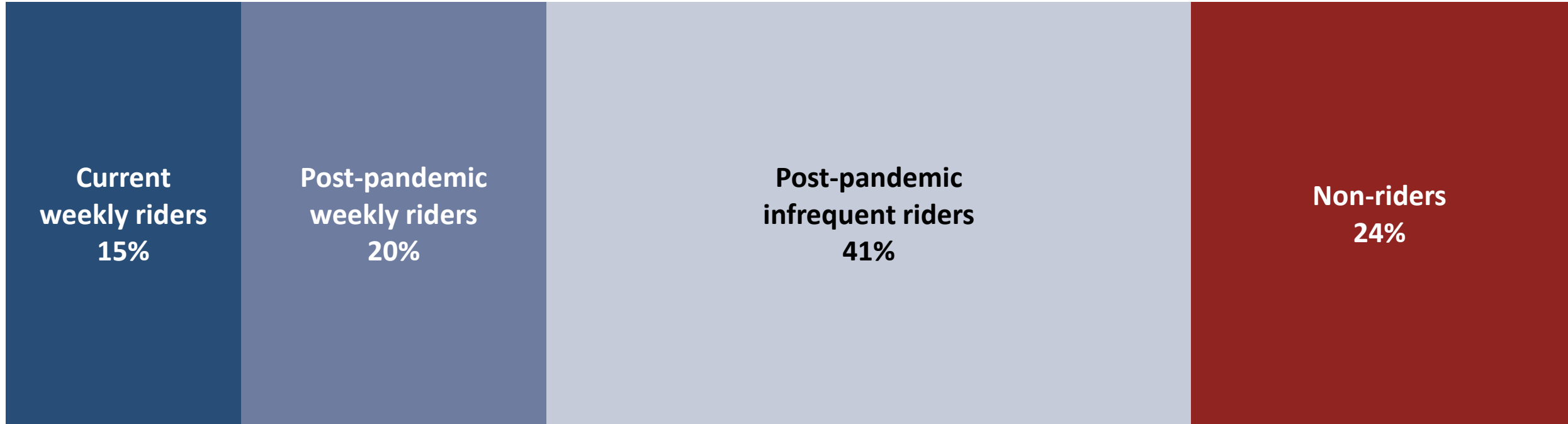
“I haven't taken BART since March (2020), but **I have every intention**, post vaccine rollout, post normalcy **to return to taking BART.**”

-- Pre-pandemic transit rider

“I would love to be able to go to a Giants game, go to the museums, go to the concerts and the things that I used to go to with other people. That's just what I'm waiting for, **venues and things like that to open up again.**”

-- Pre-pandemic transit rider

Transit Usage Groupings



Current Weekly Riders: Currently taking transit at least once a week

Post-pandemic Weekly Riders: Anticipate taking transit **at least** once a week post-pandemic

Post-pandemic Infrequent Riders: Anticipate taking transit **less than** once a week post-pandemic (but more than never)

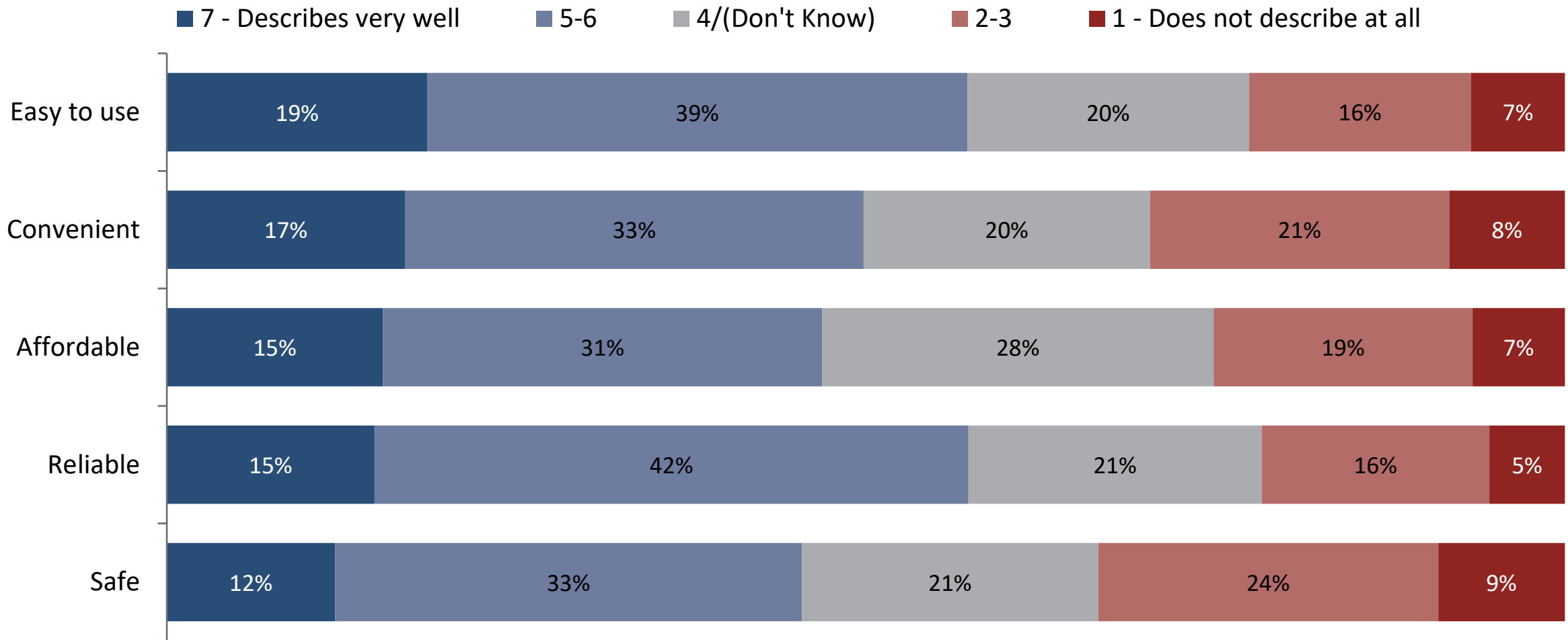
Non-Riders: Do not anticipate taking transit at all post-pandemic



Transit Perceptions

Pre-COVID Transit Perceptions

Bay Area residents were not particularly positive about transit before the pandemic.



Focus Groups: Transit Perceptions

Riders in the focus groups had a range of concerns about public transit in the Bay Area.

“It would be safer if it was on time. Transit is not on time. You just wait on the street, wait for the bus before you get on. Someone already robbed you.”

-- CBO focus group participant (Cantonese language group)

“BART is nasty and grimy, anyway. So it's like, **if you can survive a BART train, you'll survive COVID.**”

-- Pre-pandemic transit rider



“Paying all the different prices and figuring out every different schedule is kind of a lot for someone who is solely uses public transportation.”

-- CBO focus group participant (English language group)

“If I miss my ferry **I don't want to have to pay extra cash to jump on another mode of transportation.**”

-- CBO focus group participant (English language group)

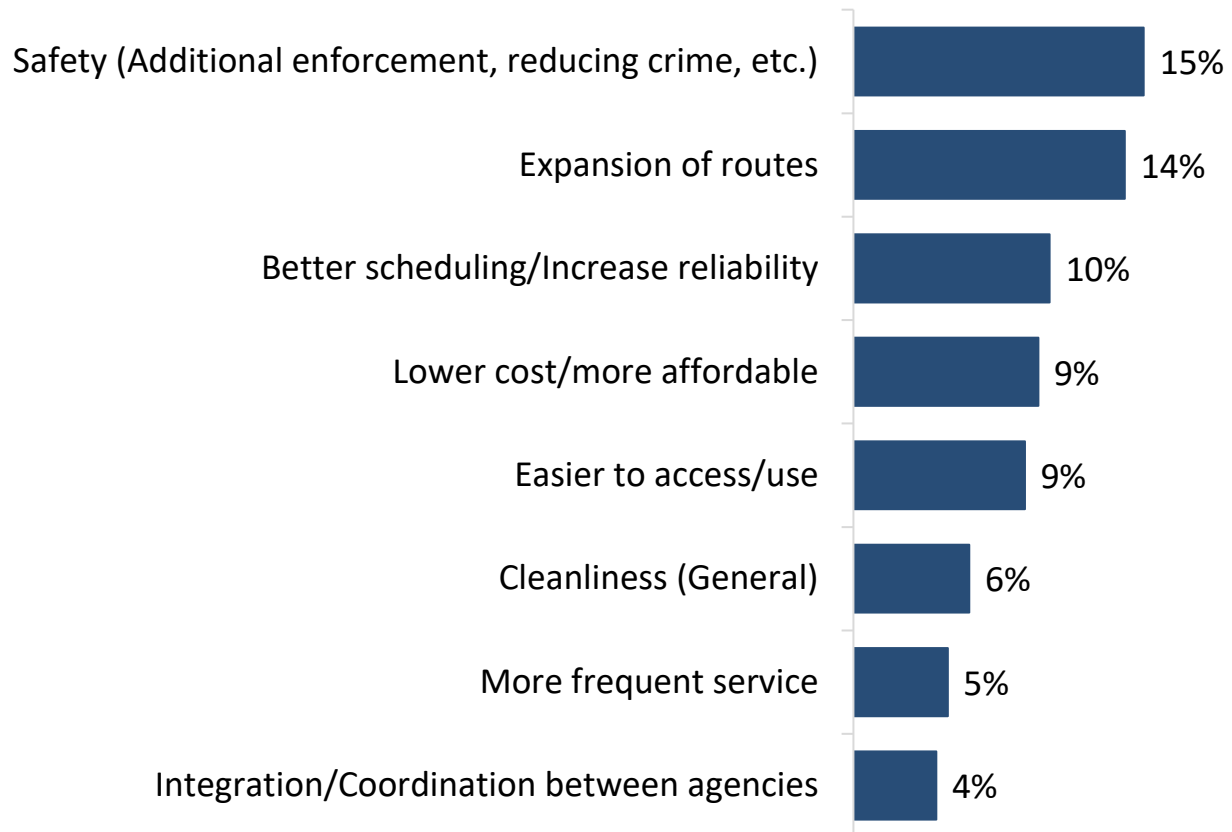
“The rate of the AC transit kept going up year by year, even though I'm a senior and I'm on a fixed income. So the increase in that and the increase in BART fares also deeply affected me. **It is becoming more difficult to be able to afford transit.**”

-- CBO focus group participant (English language group)

Future Transit Improvements: Top Responses

Nearly all Bay Area residents could name something they would like improved about Bay Area transit, with safety, convenience, reliability and affordability mentioned frequently.

What specific improvements to public transit in the Bay Area do you think we should make today that future generations will thank us for tomorrow?

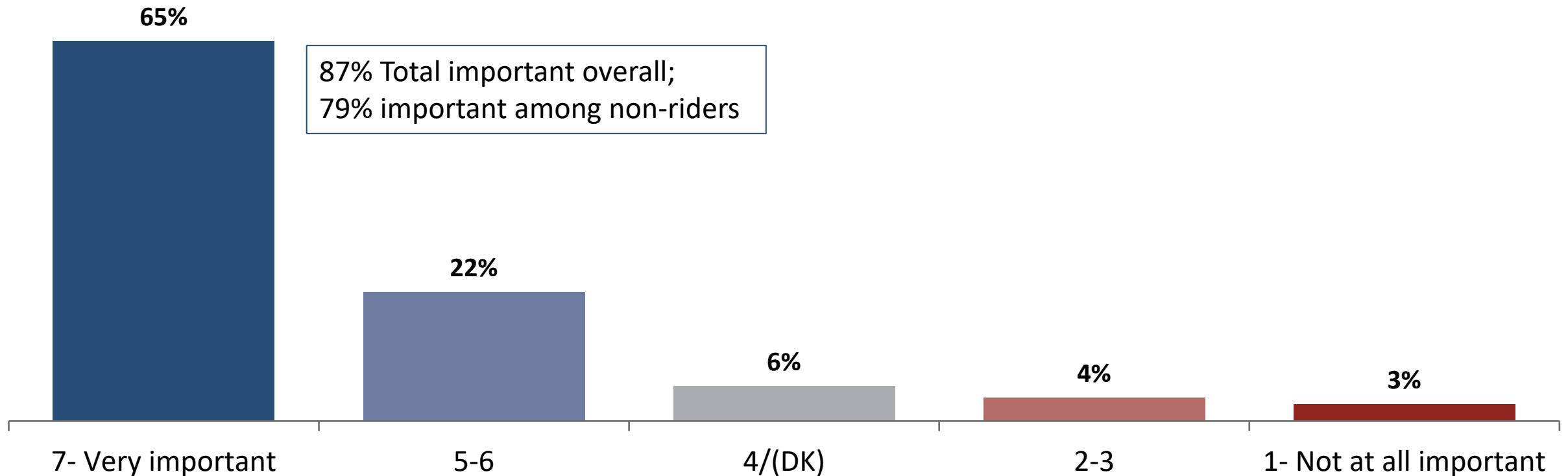


Only 16% of residents were unable to offer a suggestion on how to improve public transit in the Bay Area

Importance of Transit to the Bay Area

Public transit is seen as important for the Bay Area by nearly everyone, including those who don't ride transit.

Overall, how important is public transit for the Bay Area?



Focus Groups: Importance of Transit

Focus group participants talked about the importance of transit both to their own lives but also to the entire area. The connection of better transit to the environment was a common theme as well.

“We need to have a **multimodal system that services the entire region**, we need to have paratransit, we need to have rail, we need to have buses, we need to have shuttles...we need to have all kinds of modes of travel and we need to have service that goes where people need to use the service, we need reliable service, we need frequent service.”

-- CBO focus group participant (Persons with disabilities group)



“Now, gas is very expensive. Also, people don't drive. And when it comes environmental protection, less driving is less emission, it’s better for air quality. We're all getting old. **We need public transit.** That's part of our daily living.”

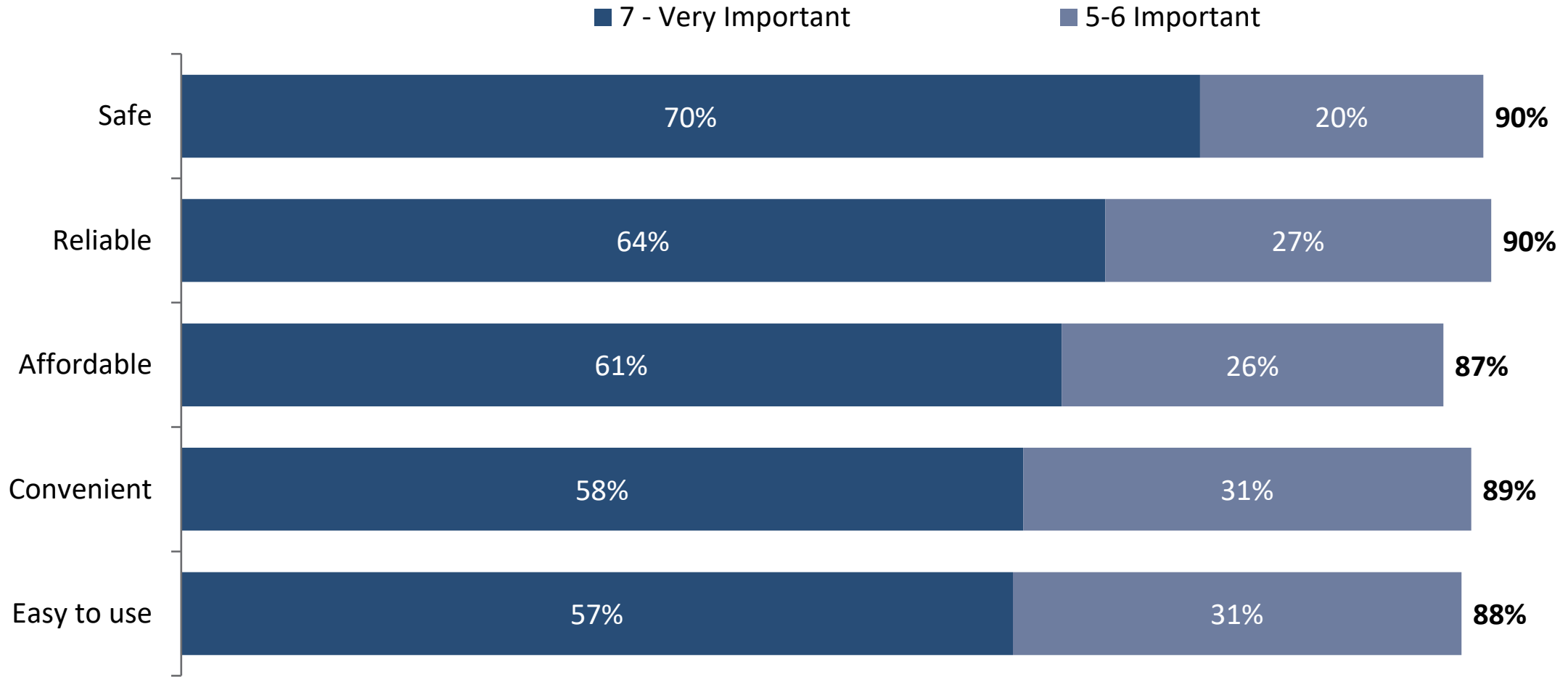
-- CBO focus group participant (Cantonese language group)

“So we get people back on public transit, rather on cars and stuff that **it would be healthier for us, it's healthy for our children and our future**, and it would be more convenient as well.”

-- CBO focus group participant (English language group)

Post-COVID Transit Importance

Bay Area residents place a high value on public transit system that is easy to use, convenient, affordable, reliable, and safe.



Q10-Q14. Now think about the future of public transit following the COVID-19 pandemic. For each of the following, please tell me how important they are to the future of the Bay Area's public transit system.

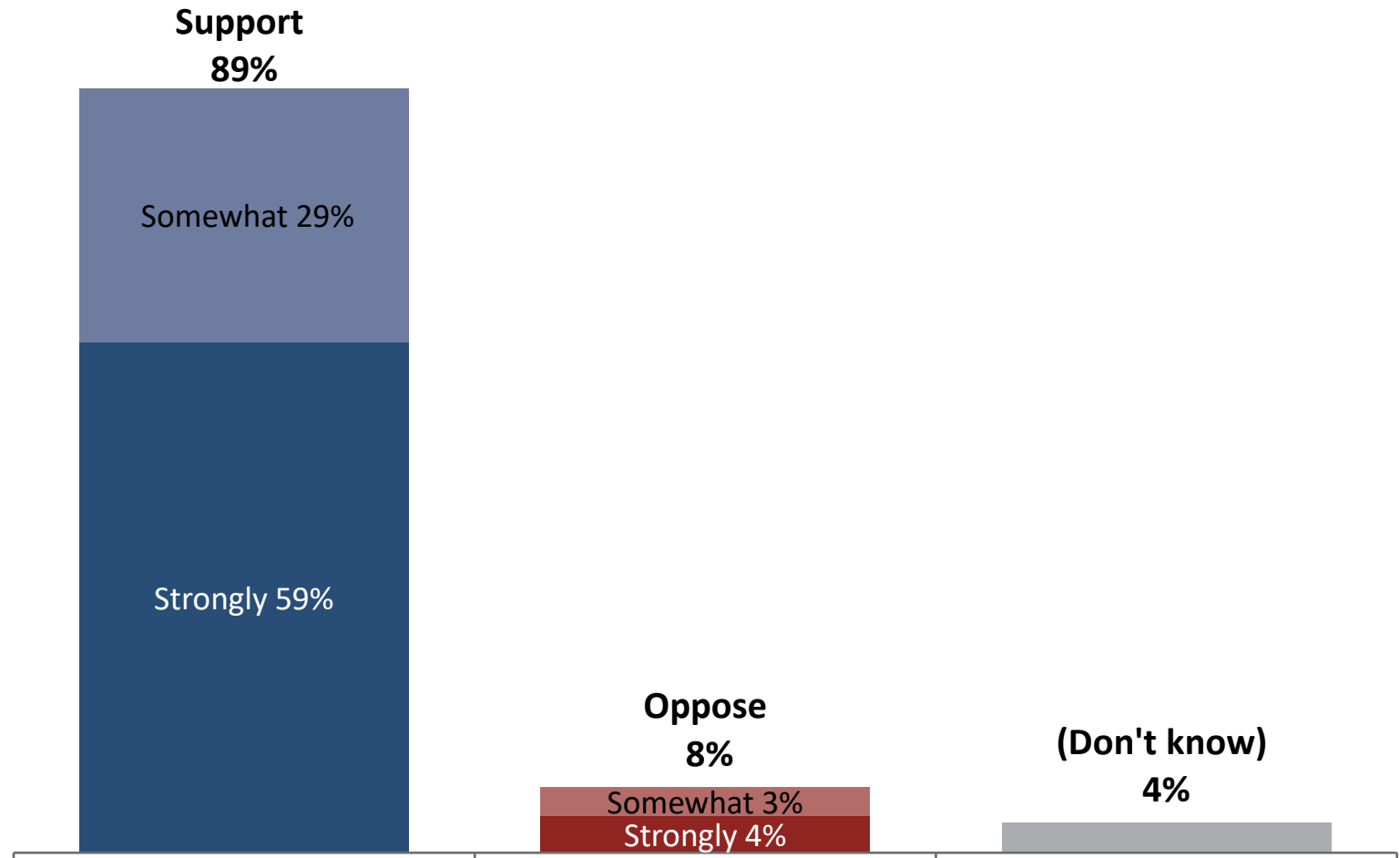


Bay Area Seamless and Resilient Transit Act

Support for Seamless Concept

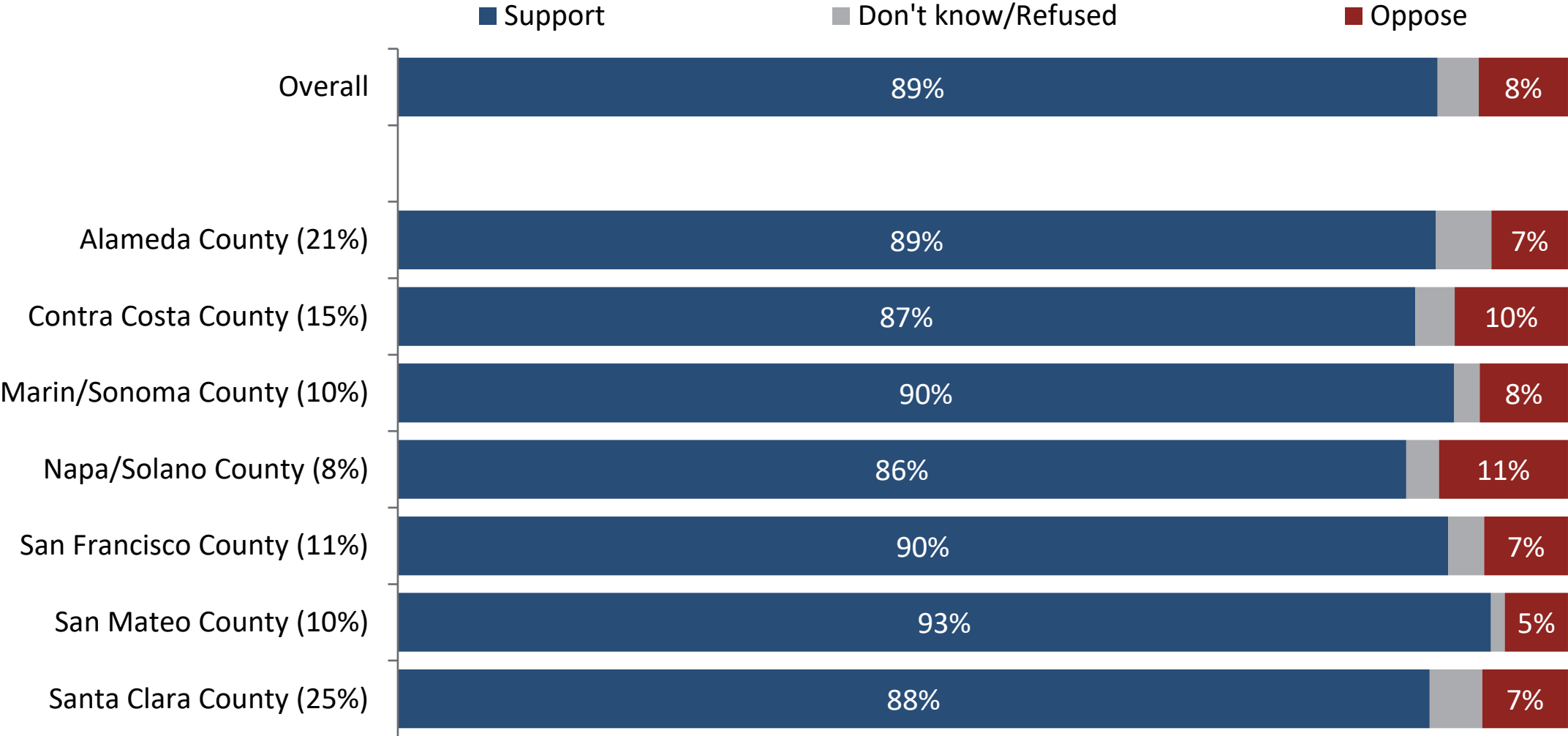
Support for the idea of better coordinated seamless transit for the Bay Area is nearly universal.

A bill has been introduced in the state legislature called the **Bay Area Seamless and Resilient Transit Act**. This bill would coordinate all of the public transit systems in the Bay Area to operate as one seamless, multimodal transit system, including consistent mapping and signage to make transit easier to navigate, regional fares so riders pay one fare for their entire trip even if they have to transfer, and real-time vehicle location data so riders know when a bus, train, or ferry will arrive.



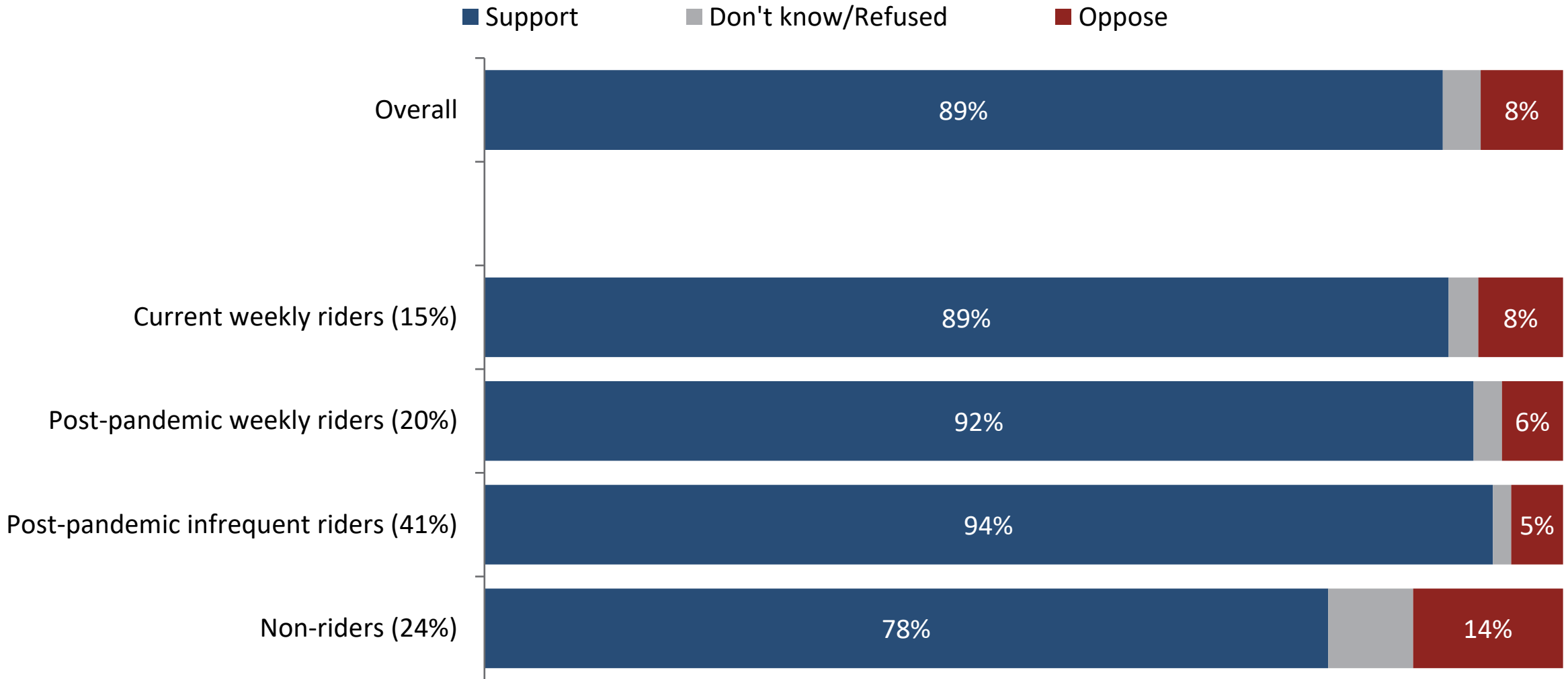
Support by Region

The idea is supported across the entire Bay Area.



Support by Transit Ridership

Current transit riders, future transit riders, and non riders all support the idea by wide margins.



Focus Groups: Support for Integrated System

Focus group participants groups felt a more integrated system would help them get where they are going more easily, comfortably, and quickly.



“When you say integrated, it sounds like if a lot of the agencies kind of work together to make sure that their riders are happy and that they're comfortable and that they're safe...they're doing a service for the Bay Area, so **they should all kind of be on the same page.**”

-- CBO focus group participant (English language group)

“I think if there was an integrated system, **more people would use it.**”

-- CBO focus group participant
(Spanish language group)

“VTA has a totally different system than BART. And then...San Mateo has a different system and they're all...taking people to work in San Francisco so **they should be synchronized.**”

-- CBO focus group participant (English language group)

“I think that it would be good if they were to **make connections in different locations and connect them all** so that people who take them, it'll be more accessible for them. That way they can know all of the options...and they would know how to...transfer from the bus to the train and get to the place where they have to go.

-- CBO focus group participant (Spanish language group)

Elements of Seamless

Bay Area residents all want the same things:

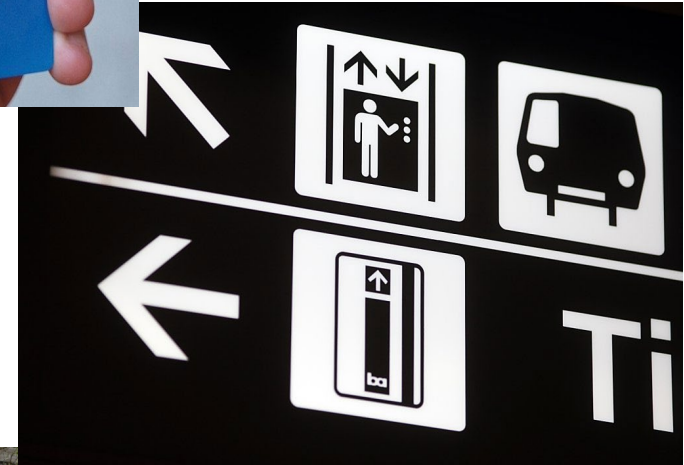
- ▶ 92% find real-time information on wait times and vehicle locations important
- ▶ 91% - 93% find better transit for dependent populations important
- ▶ 91% find more direct service, fewer transfers, and shorter wait times important
- ▶ 88% find a regional network that can set fares, align routes and schedules, and standardize information important



Elements of Seamless

Bay Area residents all want the same things:

- ▶ 92% find easy to use and uniform maps and signage important
- ▶ 90% find a single mobile app for planning, schedules, and information important
- ▶ 89% find a single set of fares, passes, discounts, and transfer policies important
- ▶ 80% find dedicated travel lanes along key transit routes for buses and carpools important



Focus Groups: Elements

Focus group participants were particularly enthusiastic about fare, schedule, and information coordination.



“I would love to see all the systems working with each other, I would love to see **fares working with each other** so that it's not a major mess to try to go on nine different systems with nine different fares.”

-- CBO focus group participants (Persons with disabilities group)

“Let people know what direction buses and transit is going and **how long it would take** for those systems to arrive at that point and **how frequently it will get to you.**”

-- CBO focus group participants (English language group)

When asked if they liked the idea of **paying just one fare** to get to their destination even if they took multiple modes:

“That sounds like a dream come true”

“That would be excellent”

“Tell us when that’s going to happen”

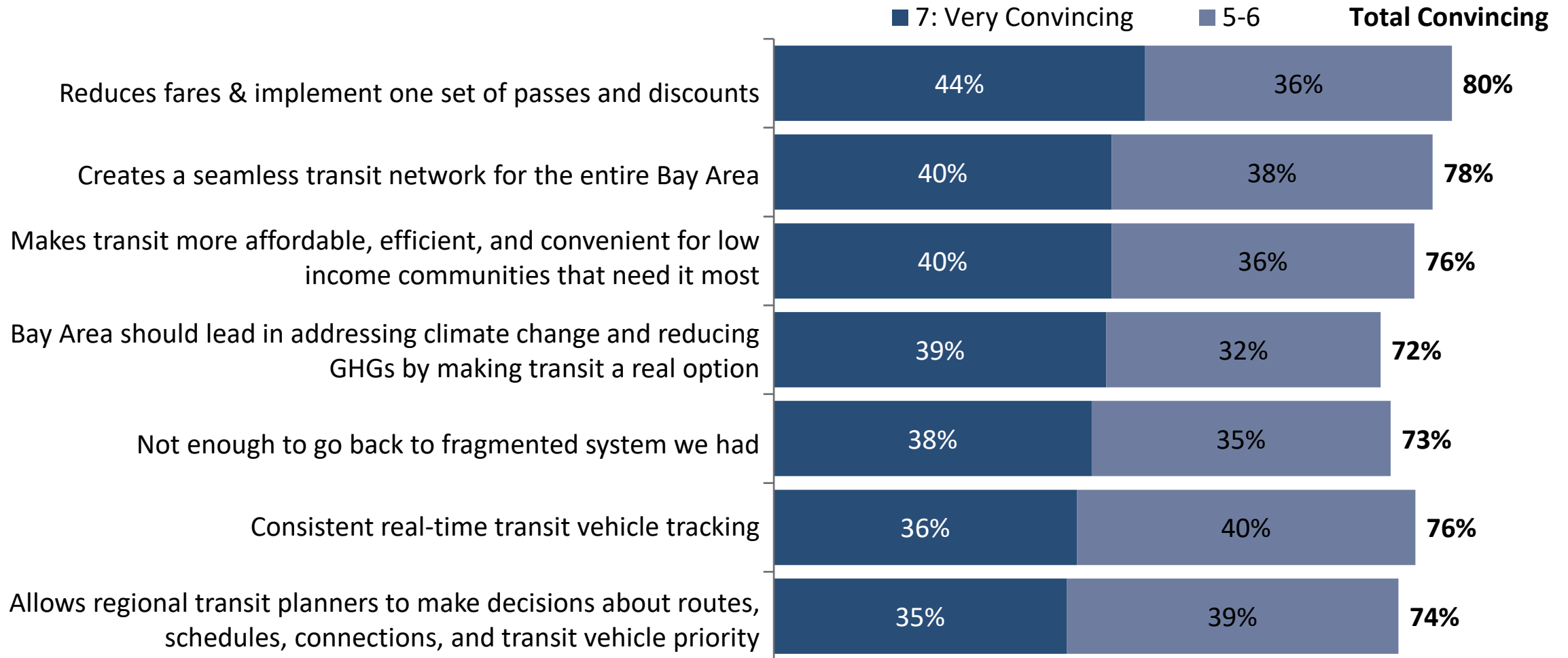
-- CBO focus group participants (Spanish language group)

“I'm thinking, if I could get to that job with only one bus or maybe one transfer in under two hours that would be nice. But if I have two, three different ones, and **if it takes me anything over an hour, it's a lost cause. Forget it.**”

-- Pre-pandemic transit rider

Impact of Additional Information

Outcomes of the proposal are compelling.



** Wording of questions condensed for presentation purposes: full statements available in topline report.*

Focus Groups: Future Transit Improvements

Many focus group participants talked about pushing for bigger improvements now, instead of only focusing on getting back to pre-pandemic conditions.

“So I would say improve and do something that's new, **instead of going backwards.**”

-- CBO focus group participant
(Spanish language group)

“I think **now's the time** before everything goes back to normal.”

-- CBO focus group participant
(English language group)



“I think that the transit agencies and MTC in particular need to stop planning 25 years out, because we're talking now and making a plan for 25 years out and **we can only think from now**, and so we're planning to fix the problems that we have now, let alone 25 years out.”

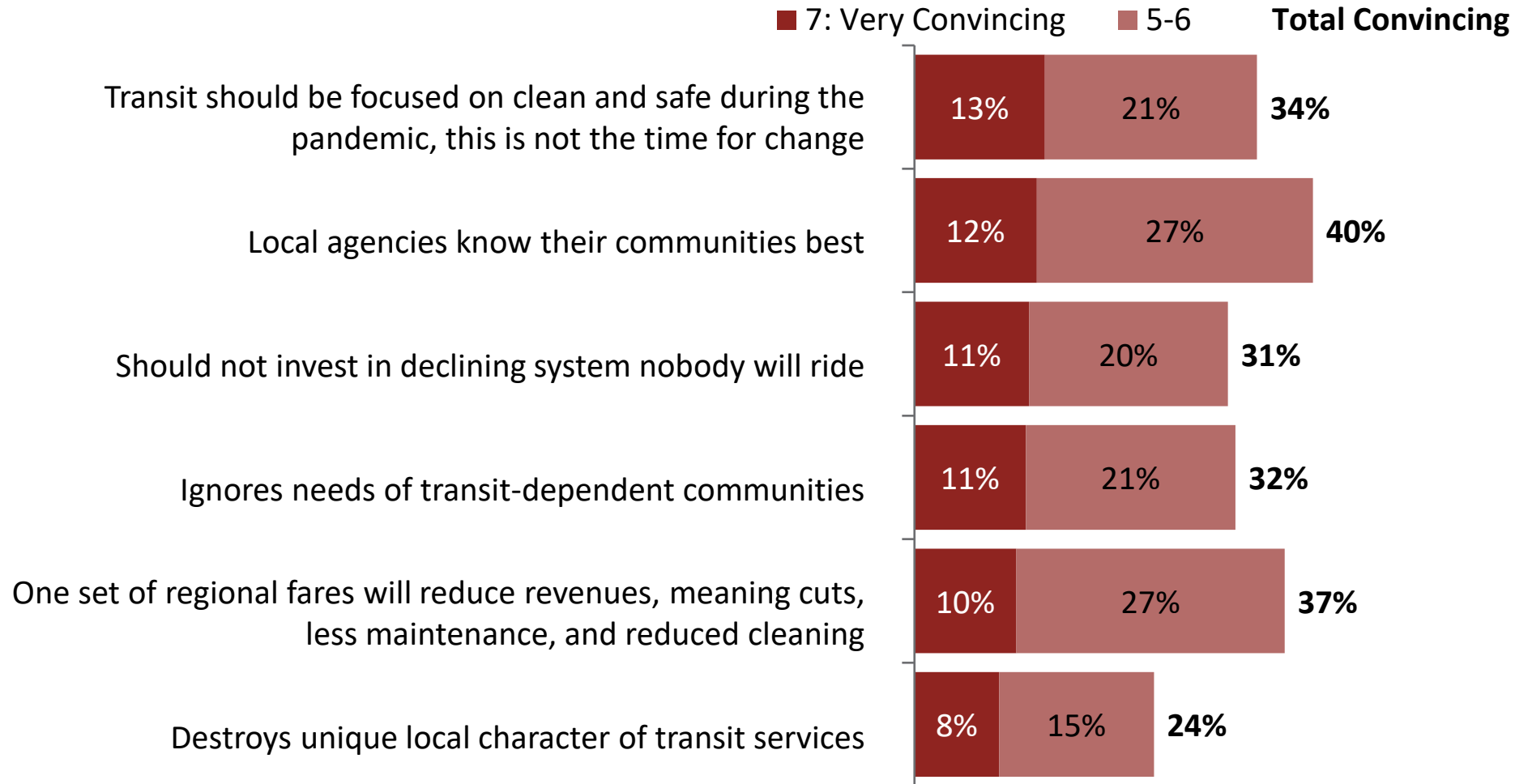
-- CBO focus group participant (Persons with disabilities group)

“My thing is, why not **fix it now while the ridership is low** and you have the time, you know? Because if it does increase, if you're not fixing it now, what makes us think that you're going to fix it then?”

-- CBO focus group participant (English language group)

Impact of Counter Information

Information against the idea of integrated regional transit has limited impact.



** Wording of questions condensed for presentation purposes: full statements available in topline report.*

Focus Groups: Concerns

There were some concerns from focus group participants about implementation and unintended consequences.



“Negative things will be people, they go short distance, they have to **pay more, be more expensive.**”

-- CBO focus group participants
(Cantonese language group)

“Transit agencies have a habit of only caring about the choice riders. I think **transit dependent riders should be front and center.**”

-- CBO focus group participants
(Persons with disabilities group)

“What I'm afraid that might happen is if this network integration happens, **we better not make some bad precedent** or do something wrong, that has something really crappy baked into it, that is really hard to get out.”

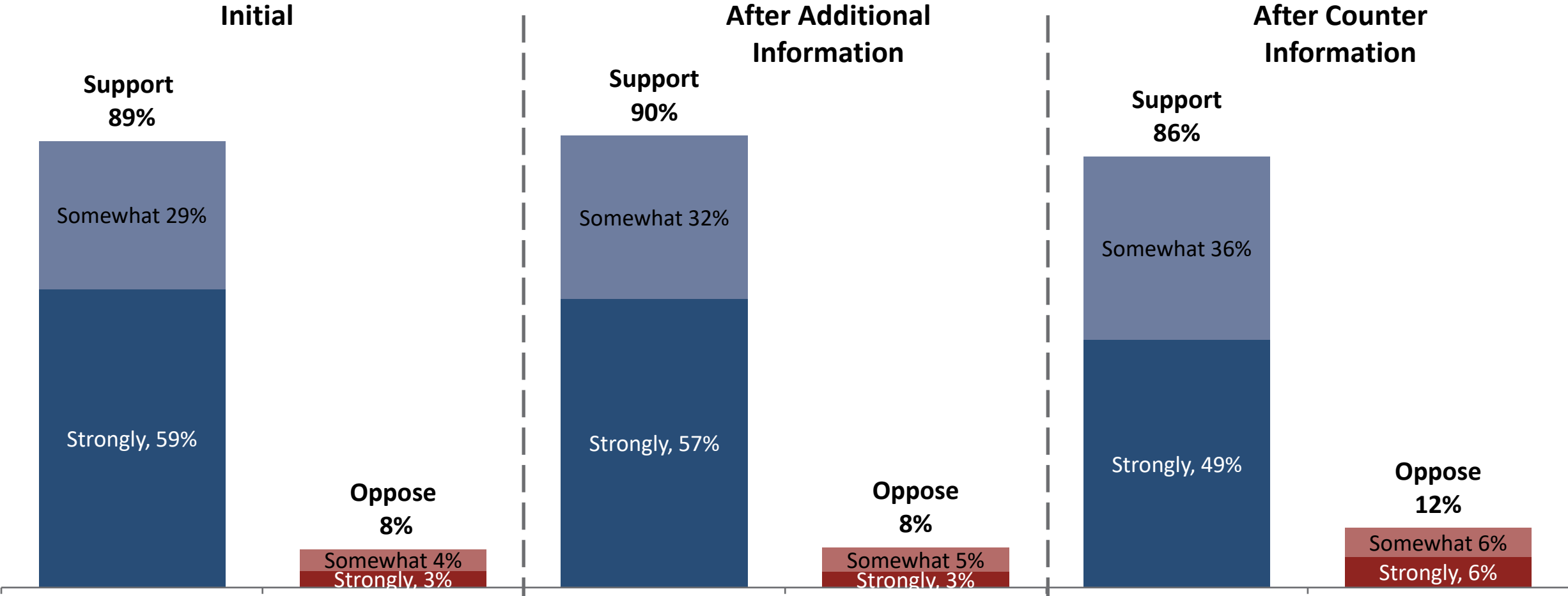
-- CBO focus group participants (Persons with disabilities group)

“You can look the old BART (online) platform. It basically just was an app, but it just pulled up the old school web page, so **it didn't really actually provide any real specifically helpful things.**”

-- CBO focus group participants (English language group)

Seamless Support Progression

Additional information about the issue does little to impact support for the idea.



Conclusions

- ▶ Transit riders in the Bay Area do anticipate returning to transit
- ▶ Return to normal may take months, and many anticipate reducing their number of days in the office
- ▶ Residents, including non-transit users, place a high value on a quality public transit system
- ▶ There is near universal desire to see significant improvements in public transit including around fare structures, frequency, connectivity, and availability of information
- ▶ Transit-dependent residents are especially eager to see changes



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