

Research plan

Metropolitan Transportation Commission and Steer

Regional Fare Coordination and Integration Study (FCIS)

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Research goals

The purpose of this qualitative user research is to identify the motivations, goals and needs of transit customers navigating the complex urban transit and mobility landscape of the Bay Area. We seek to gain an understanding of transit riders' experience of fares barriers and the broader context of the value of the service.

The insights derived from these user research activities will inform the Fare Coordination and Integration Study (FCIS) team throughout other tasks (Task 2, 3, 4, 6). The research will include a summary of key fare barriers identified by customers and anchor barrier analysis in customer perceptions.

Key research questions

Following the FCIS Problem Statement framework, we have organized our inquiry around the four issues of customer value, payment experience, equity, and eventually, future transit. Emerging from a MTC workshop on September 9, the additional research focus of “Systemic Issues” will be contemplated to provide further background context.

Customer value

Understand how customers perceive the price of their trips

Focus	Key questions
Definition of value	<ul style="list-style-type: none">• How does a customer define value?• How do values and local cultures influence individual value decisions?• What do passengers value in a transit service?• How does a customer’s perception of value change with time? With number/duration of transfers?
Comparison of transit and other modes of transportation	<ul style="list-style-type: none">• What do customers consider when deciding between different modes of transportation?• What factors make transit more or less attractive than other forms of transportation?• How does transit fares and transit service compare with driving in the Bay Area?
Cost of transit and decision making	<ul style="list-style-type: none">• What are the most important factors in your travel decisions?• How do fares impact different transit modal choices?• How do customers perceive the cost of fares?
Transit experience	<ul style="list-style-type: none">• What is the customer’s favorite and least favorite aspects of transit?• What is missing from the transit riding experience?

Payment experience

Explore satisfaction with current fare product offering

Focus	Key questions
Current usage of fare products	<ul style="list-style-type: none">• What fare products do customers use and why?• How are different fare mediums involved in different parts of

	<ul style="list-style-type: none"> a customer's trip? What are the barriers to obtaining a Clipper Card?
Experience of different payment mediums	<ul style="list-style-type: none"> How consistent is the payment experience every time a customer takes transit? How does it vary? How do different payment mediums impact the transit experience?
Legibility of fare payments	<ul style="list-style-type: none"> How do customers learn how to pay? How do customers determine the fare they need to pay for a trip?
Meaning ascribed to payment mediums	<ul style="list-style-type: none"> What is the meaning customers associate with the objects involved in payment? What can we learn about the material nature of fares/form/objects that relate to value?

Equity

Equity assessment

Focus	Key questions
Impact on vulnerable populations	<ul style="list-style-type: none"> How do technology requirements impact vulnerable populations? How do upfront cash requirements (e.g. autoloading) take away from use or quality of experience on transit? What is it like being a transit-dependent person? Are vulnerable populations/riders truly cash users? How do we find equitable fare products for unbanked populations or those who pay as they go?
Fairness	<ul style="list-style-type: none"> How do passengers define fairness? What feels unfair about the public transit fares?
Affordability	<ul style="list-style-type: none"> What tradeoffs do customers have to make to afford transit? How does the price affect how you travel?
The role of policy	<ul style="list-style-type: none"> How does fare policy impact families of various structures (e.g. traveling with dependents)? In what way are our fare policies regressive compared to other modes of transportation?

Systems

Understanding the system as a whole

Focus	Key questions
System offering	<ul style="list-style-type: none">• Does the transit network provide adequate coverage and service to where customers want to go?• Do the fare products accommodate for customers' travel behaviours (e.g. groups, weekend trips)?
Legibility of the system and its fares	<ul style="list-style-type: none">• Do customers understand why a transit trip costs what it does?• Do customers need to or want to understand how fares are calculated?• Do customers know how far their transit trips are?

Methods

Our qualitative research approach will start with a narrative workshop of transit customers from across the Bay Area. The resulting stories, issues, and themes will inform a revised focus in an evolving research plan and shape our 1:1 interview focus to follow in later stages of the project. The research plan will accommodate changes based on knowledge gained through the research.

Narrative workshop

Narrative workshops rely upon the sharing of stories and anecdotes about the problem/subject area, gathered from customers via in-person/remote story circles or via an online form. Storytelling is a natural and oblique method that allows us to get inside both the action taking place and its meaning. Stories and anecdotes can then be signified (indexed) via labels/categories that have emerged through bottom-up categorization workshops with customers. Indexing activities using schema derived by the storytellers themselves seeks to remove the bias of an “expert” coding of the stories.

We plan to facilitate one workshop with 12 to 20 people. The workshop will be held remotely using Zoom with facilitators guiding the participants through the discussions when breaking out into smaller groups. Remote whiteboard technology (like Miro or Mural) will be used to capture the outputs of the workshop and then reported out in the form of a presentation back to the project team.

One-on-one interviews

Critical to user research, interviewing customers consists of meeting and speaking with them. Through interviews, customers are empowered to provide their point of view, using their language and terms.

While it is recommended to hold these in the context of use of the service (e.g. while riding the bus or taking the train), during the pandemic interviews will be held remotely using the phone or video. These interviews will be scheduled in advance for up to 60 minutes to allow time to dive into a deeper discussion.

All participants in workshops and interviews will be compensated for their time according to best practices in market research and at market rates.

Participant considerations

Participant requirements for narrative workshop

Our goal is to recruit 12 to 20 participants for a 2-hour video conference workshop. We intend to recruit a sample of transit riders that generally mirror the distribution of riders across the Bay Area, seeking members from across the nine counties, with differences distributed across income, age, gender, race, and ability.

Required for all participants

Regular users of transit

or

Regular users of transit prior to the pandemic lockdown

Demographic characteristics / categories to recruit against

- **Geography (nine counties)**
 - Alameda
 - Contra Costa
 - Marin
 - Napa
 - San Francisco
 - San Mateo
 - Santa Clara
 - Solano
 - Sonoma
- **Income**
 - Less than \$25,000
 - \$25,000 - \$49,000
 - \$50,000 - \$74,999
 - \$75,000 - \$99,999
 - \$100,000 - \$150,000
 - \$150,000 or more
- **Age**
 - 18 - 24
 - 25 - 34
 - 35 - 44
 - 45 - 54

- 55 - 64
 - 65+ (Seniors)
- **Gender**
 - Male
 - Female
 - Non-binary
 - Custom / Other (user described)
- **Race (check all that apply)**
 - African-American Alone
 - American Indian Alone
 - Asian Alone
 - Native Hawaiian Or Pacific Islander Alone
 - White Alone
 - Mixed Race
 - Other

Other information to collect

- **People with disabilities**
 - User of paratransit services
- **Whether English is participants' first language**
 - Languages other than English
 - English proficiency
 - Very well
 - Well
 - Not well
 - Not at all
 - Prefer to not answer
- Whether participants have access to automobiles (personally owned, car share membership, etc)

Participant breakdown by criteria

Where we can find supporting evidence, we will aim to recruit participants based on the demographics of the population in the Bay Area. Note that some participants may satisfy multiple criteria as we aim towards recruiting a total of 20 participants for the narrative workshop.

For **Gender**, we aim to recruit evenly.

For **paratransit services**, we will not recruit for participants who use paratransit services specifically because FCIS will not touch on paratransit services.

Other criteria breakdowns are listed below.

Geography (county)

County	Population (2018 Vital Signs)	Percentage	Participants (out of 20)
Alameda	1,656,884	21.4%	4
Contra Costa	1,147,879	14.8%	3
Marin	262,803	3.4%	1
Napa	140,966	1.8%	1
San Francisco	880,980	11.4%	2
San Mateo	772,372	10.0%	2
Santa Clara	1,947,798	25.1%	5
Solano	439,102	5.7%	1
Sonoma	502,866	6.5%	1

Income

Income is based on the country¹ as Vital Signs only reports on median and quantiles.

Income	Percentage of US adults (Pew Research)	Participants (out of 20)
Less than \$25,000	15%	9

¹

https://www.pewresearch.org/fact-tank/2016/04/07/who-relies-on-public-transit-in-the-u-s/ft_16-04-06_pubtrans_demographic/

\$25,000 - \$49,999	Combined percentage 8%	3
\$50,000 - \$74,999		2
\$75,000 - \$99,999	Combined percentage 10%	2
\$100,000 - \$150,000		2
\$150,000 or more		2

Age

Adjusted number of participants factors in equity and access to transit in the country².

Age bracket	Population (Bay Area Census 2010)	Percentage	Participants (out of 20)	Suggested (out of 20)
18 - 24	Combined population 4,682,837	Combined percentage 84.2%	5	8
25 - 34			4	4
45 - 54			4	3
55 - 64			4	3
65+	878,229	15.8%	3	2

Race

Adjusted number of participants factors in equity and access to transit in the country³.

Race	Population (Bay Area Census 2010)	Percentage	Participants (out of 20)	Suggested (out of 20)
African American	481,361	6.7%	1	7
American Indian	48,493	0.7%	1	1
Asian	1,664,384	23.3%	4	4

²

https://www.pewresearch.org/fact-tank/2016/04/07/who-relies-on-public-transit-in-the-u-s/ft_16-04-06_pubtrans_demographic/

³

https://www.pewresearch.org/fact-tank/2016/04/07/who-relies-on-public-transit-in-the-u-s/ft_16-04-06_pubtrans_demographic/

Native Hawaiian or Pacific Islander	44,386	0.6%	1	1
White	3,755,823	52.5%	10	4
Mixed Race	20,024	0.3%	1	1
Other	770,820	10.8%	2	2

Honorarium for participants

Giving an honorarium is a common practice to thank participants for their time. It is also an incentive for people to participate.

We recommend an honorarium \$75 for the narrative workshop. Every participant will be given the same amount for their honorarium.

Introduction to recruitment for narrative workshop [DRAFT]

MTC, Bay Area transit agencies and county transportation agencies are investigating ways to make the region's transit network better coordinated, more affordable and more attractive through the Transit Fare Coordination and Integration Study.

MTC invites the public to participate in workshops and interviews to help better understand their customer experience.

The workshop ask:

We are looking for regular transit riders to attend a small group 2-hour online workshop, to share their transit experiences. We are looking for a diverse group of participants that reflect the broader population of the Bay Area and transit ridership. Attendees will be compensated for their time and participation. Internet access through a desktop, laptop, tablet, or mobile phone with video and audio will be required to participate.

The Fare Coordination and Integration study is an ongoing project and transit customers will be required throughout the project. If you are interested, please sign up here ([link to survey monkey](#))



Stage 1 Recruitment Survey

Bay Area Fare Integration Workshop Participant Survey

Para encuesta en español, [haga clic aquí](#)

Thank you for your interest in the Bay Area Fare Coordination and Integration Study. Please answer the following questions to help us put together a diverse group of participants that reflect the broader population of the Bay Area.

We are looking for regular transit riders to attend a small group 2-hour online workshop, to share their transit experiences. Attendees will be compensated for their time and participation. Internet access through a desktop, laptop, tablet, or mobile phone with video and audio will be required to participate. The Fare Coordination and Integration study is an ongoing project and transit customers will be invited to participate throughout the project.

1. What is your name?

First

Last

* 2. What is your email address?

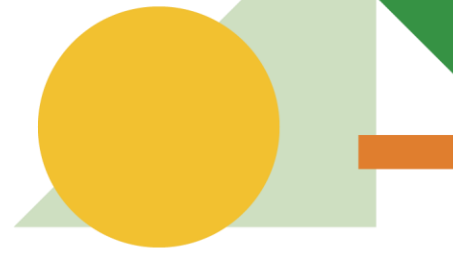
* 3. What is your county of residence?

- ☐ Alameda
- ☐ Contra Costa
- ☐ Marin
- ☐ Napa
- ☐ San Francisco
- ☐ San Mateo
- ☐ Santa Clara
- ☐ Solano
- ☐ Sonoma
- ☐ Other County

* 4. Age

- ☐ 18-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-64
- ☐ 65+

Done



Stage 2 Recruitment Survey

Metropolitan Transportation Commission

Fare Coordination and Integration Study

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Title

Bay Area Fare Integration Workshop Participant Survey

Introduction

Thank you for your interest in the Bay Area Fare Coordination and Integration Study. We are looking for regular transit riders to attend an online workshop to share their transit experiences.

Workshop details

- Date: On October 5, 2020 or October 6, 2020
- Duration: 2 hours
- Format: Online (using Zoom)

- Invitations and information to the workshop will be sent to selected attendees via email.
- Attendees will be compensated for their time and participation.
- Internet access through a desktop, laptop, tablet, or mobile phone with video and audio will be required to participate.

Please answer the following questions to help us put together a diverse group of participants that reflect the broader population of the Bay Area. This information is private and confidential. It will not be shared or used outside of the Bay Area Fare Coordination and Integration Study.

Questions

1. Which of the following technologies do you have access to for participating in this online workshop? Select all that apply.
 - ☐ Desktop computer
 - ☐ Laptop
 - ☐ Tablet
 - ☐ Mobile smartphone
 - ☐ I do not have a device that can access the internet.
 - ☐ Other
2. What is your gender?
 - ☐ Male
 - ☐ Female
 - ☐ Non-binary
 - ☐ I identify as: _____
3. What is your age?
 - ☐ 18 - 24
 - ☐ 25 - 34
 - ☐ 35 - 44
 - ☐ 45 - 54
 - ☐ 55 - 64
 - ☐ 65+
4. Which of the following best describes your total yearly household income?
 - ☐ Less than \$25,000
 - ☐ \$25,000 - \$49,000
 - ☐ \$50,000 - \$74,999
 - ☐ \$75,000 - \$99,999
 - ☐ \$100,000 - \$150,000
 - ☐ \$150,000 or more
5. Which race do you identify as? Select all that apply.
 - ☐ African-American
 - ☐ American Indian
 - ☐ Asian
 - ☐ Native Hawaiian Or Pacific Islander
 - ☐ White
 - ☐ Mixed Race

- ☐ Other: _____
- 6. Do you use any paratransit services (e.g. East Bay Paratransit, LINK Paratransit)?
 - ☐ Yes
 - ☐ No
- 7. Do you personally own a car or have membership to car share services (e.g. ZipCar, GIG Car Share)?
 - ☐ Yes
 - ☐ No
- 8. How well do you speak English?
 - ☐ Very well
 - ☐ Well
 - ☐ Not well
 - ☐ Not at all
 - ☐ Unknown
- 9. Do you speak a language other than English at home?
 - ☐ Yes
 - ☐ No
- 10. What languages do you speak at home other than English? If you speak more than one language, please list and separate them with a comma.
 - ☐ _____

Note: Question 10 only appears if the answer to Question 9 is Yes.