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Metropolitan Transportation Commission

Return to Transit Research Review Report

October 2020

Project Purpose

- ▶ The Shelter-in-Place orders issued in mid-March led to an immediate and significant drop in travel and commuting around the Bay Area. A number of transit agencies and other organizations in the area have conducted qualitative and quantitative research on this topic during that period, investigating the shift in habits, perceptions, and expectations about current and future transit ridership.
- ▶ The purpose of this report is to summarize the common findings that were identified through a review of this existing research provided by MTC, to determine where the gaps are in that research and inform the design of our own research program to fill those gaps and unify the body of knowledge.
- ▶ The first section of this report summarizes the common themes and findings that emerge from previous research, despite these surveys being conducted at different times and asking different questions.
- ▶ The final section includes EMC's suggestions for prospective research on the topic.

Research Reviewed for this Report

- ▶ **Timing Note: Most of the reviewed research was conducted in the May to July 2020 timeframe, when return to work plans were just beginning to be formulated and much was still not understood about COVID-19.**
- ▶ Transit rider research was provided by 11 Bay Area transit agencies, including ACE, AC Transit, BART, Caltrain, Capitol Corridor, Golden Gate Transit, Golden Gate Ferry, SamTrans, SMART, VTA, and WETA. Most of the agency research was conducted online using invitations distributed through rider lists, social media postings, agency websites, and community groups.
- ▶ Employer research was provided by Bay Area Council, Silicon Valley Leadership Group, and Caltrain's GoPass program.
- ▶ More details on the methodology for each piece of research is in the appendix to this report.

- ▶ Most of the research reviewed was not designed to obtain a random sample of riders of each operator, but instead was promoted to gather as many responses as possible to an opt-in online survey tool. Only a few agencies took necessary steps to control for known sources of sample bias inherent in this design.
- ▶ Respondents were also asked to predict their own future behaviors in a very uncertain and changing environment, which can be fairly unreliable when it comes to actually predicting future behaviors.
- ▶ As a result we advise that this data be considered only for **general sense of direction and sentiment**, and not interpreted as a truly representative and reliable sample of former or current riders.
- ▶ Because the questions asked in each survey were often slightly different, and asked of different rider groups, the data represented here is our best attempt at making direct comparisons across the various studies.



Summary

Current Rider Behavior

- ▶ A majority of Bay Area transit riders **stopped riding transit** in March 2020; many of the rest reduced their ride frequency.
- ▶ The reduction was largely driven by **employers shutting down workplaces** and requiring work be done remotely; replacing transit riding with another travel mode was a much smaller driver of trip reduction.
- ▶ Remaining riders were mostly **commuting to work**, and many identified themselves as **essential workers**; those continuing to ride were largely lower income, more likely to be Black or Hispanic, and less likely to own or have access to a vehicle.

- ▶ Many riders believed they would return to at least some transit riding **when employers reopen workplaces** and the shelter in place orders are relaxed; **few said they would wait for a vaccine** or cure to consider a return to transit.
- ▶ Many riders expect to **telecommute more frequently** than before COVID, and many felt their employers may support **flexible work schedules** to ease commute crowds. For most agencies there is a small segment likely to replace some or all of their transit trips with driving.
- ▶ The biggest concern about both current and former riders have about returning to transit is the **potential for exposure** to the virus. Enforced **mask wearing**, enhanced vehicle and station **cleaning, distancing**, and **hand sanitizer** are important both for current and past riders. Clear and consistent **communication** and **visible cleaning and enforcement** were requests.

- ▶ Nearly all employers reported that **most or all of their workforce was working remotely** when the surveys were conducted, and most felt they would not ask staff to come back until the **stay at home order was ended**. Many were only starting to work on return to work strategies.
- ▶ Many employers said they were willing to continue **allowing employees to work remotely** even when restrictions are lifted, or allow for **flexible work arrangements** such as staggered hours or rotating office shifts. Many employers were also preparing to offer **protective equipment and supplies** for their employees, as well as creating distancing guidelines.
- ▶ Employers may be **hesitant to encourage transit use** or shared rides for commuting coming out of the pandemic.



Recommendations

Future Research Topics: Riders/Public



- ▶ Better understand challenges and perceptions of **transit-dependent populations**, including those still riding (or who never stopped)
- ▶ Continue to track key **behaviors and perceptions** on workplace reopening, transit ridership, and safety
- ▶ Monitor potential for **long-term change** in commuting
- ▶ Gauge reactions to **evolving public health information** and developments regarding COVID, including impact of national, state, and local leadership
- ▶ Measure **awareness** of transit operator safety measures and communications on COVID safety
- ▶ Test **impact of potential messaging** around safety and return to transit



Future Research Topics: Employers



- ▶ Hear from a **range of employer types**, sizes, industries, and locations, about the near and long-term transportation needs of their employees
- ▶ Understand planning process and timeline for asking employees to return to work, including the **triggers** that might set a plan in motion
- ▶ Gauge potential for mid- and long-term changes in support for increased or continued **remote work**
- ▶ Understand how employee **commute behaviors** interact with perceptions of **workplace safety**
- ▶ Support collaboration between **employers and operators** to ensure transit planning is coordinated with return to workplace plans
- ▶ Explore what employers are learning from their own **employee engagement processes** on future commute plans and concerns



Detailed Report

Summary: Current Rider Behavior



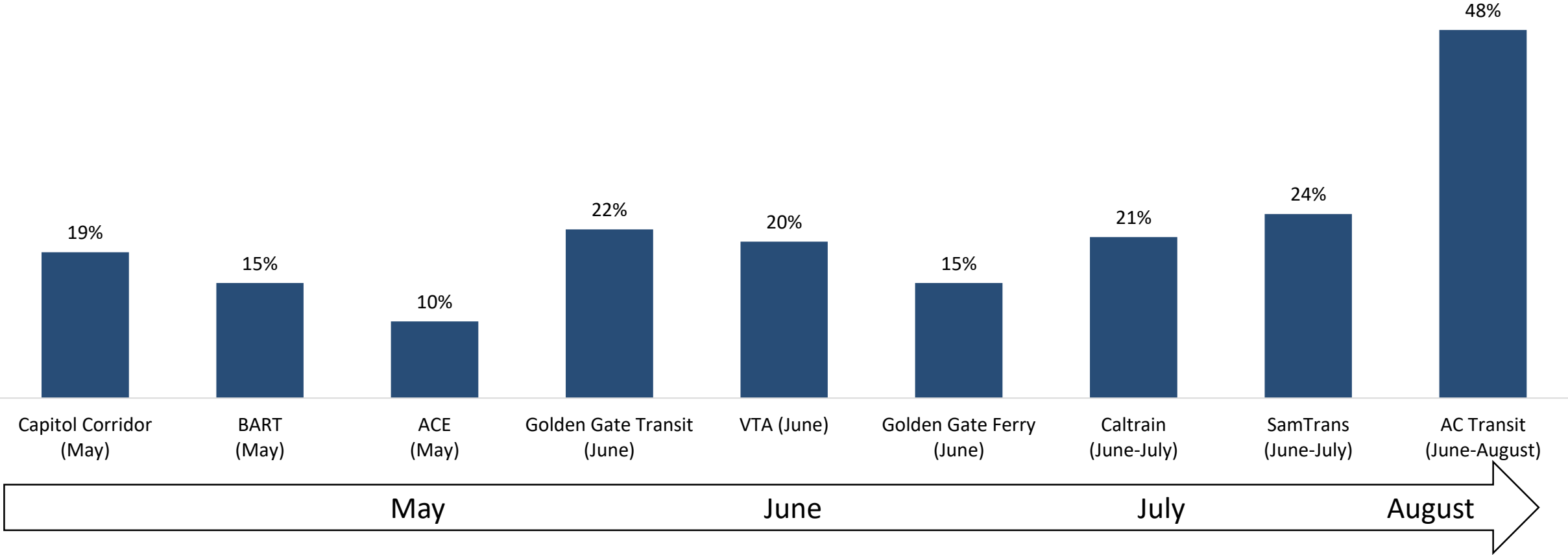
AP Photo/Jeff Chiu

- ▶ A majority of Bay Area transit riders **stopped riding transit** in March 2020; many of the rest reduced their ride frequency.
- ▶ The reduction was largely driven by **employers shutting down workplaces** and requiring work be done remotely; replacing transit riding with another travel mode was a much smaller driver of trip reduction.
- ▶ Remaining riders were mostly **commuting to work**, and many identified themselves as **essential workers**; those continuing to ride were largely lower income, more likely to be Black or Hispanic, and less likely to own or have access to a vehicle.

Ridership vs. Pre-COVID

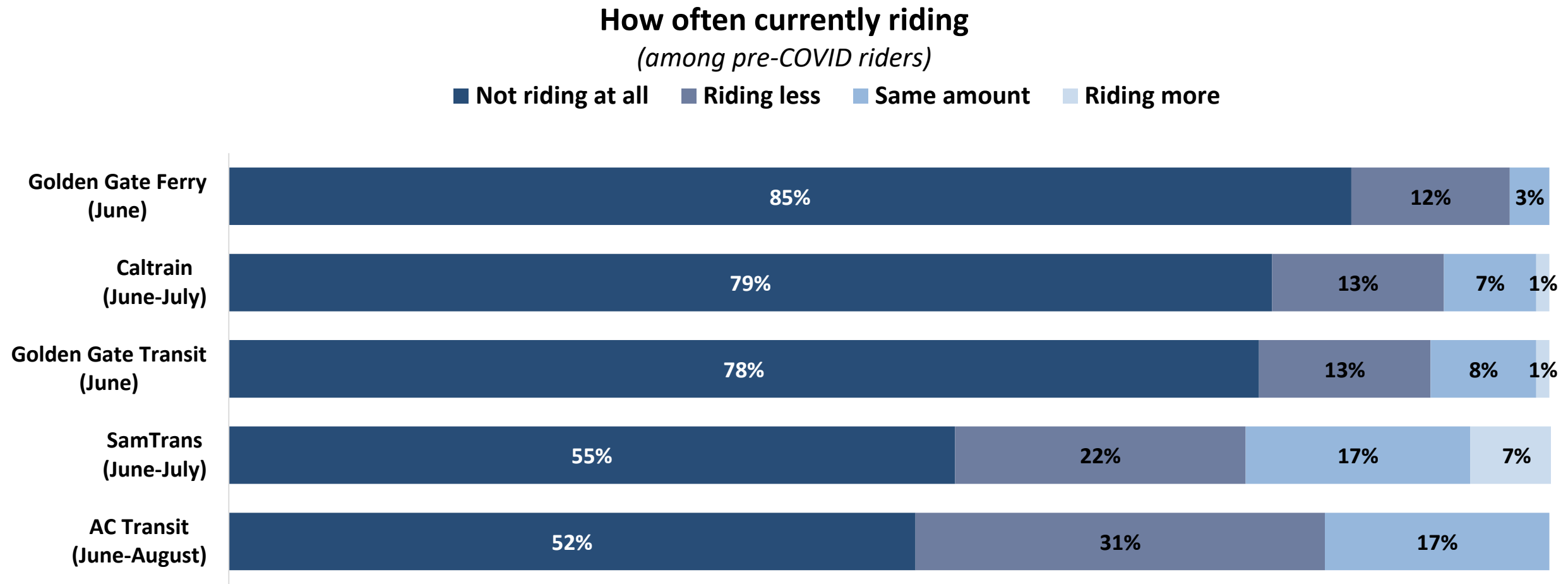
Ridership was down significantly at the point these surveys were taken.

% of Pre-COVID ridership at time survey was conducted



Change in Ridership During COVID

While some had merely reduced their riding, a majority had stopped riding at all where this question was asked.



What Drove Ridership Change

Working at home was the most significant driver of ridership drops, followed by COVID-related safety concerns.



Working/Schooling at home

Golden Gate Transit	79%
Golden Gate Ferry	75%
Caltrain	65%
AC Transit	60%
SamTrans	47%



Concerns about safety/cleaning/distancing on transit

SamTrans	46%
Caltrain	45%
Golden Gate Transit	29%
Golden Gate Ferry	28%
AC Transit	19%



Service changes/cuts

SamTrans	21%
Caltrain	15%
AC Transit	12%
Golden Gate Ferry	3%



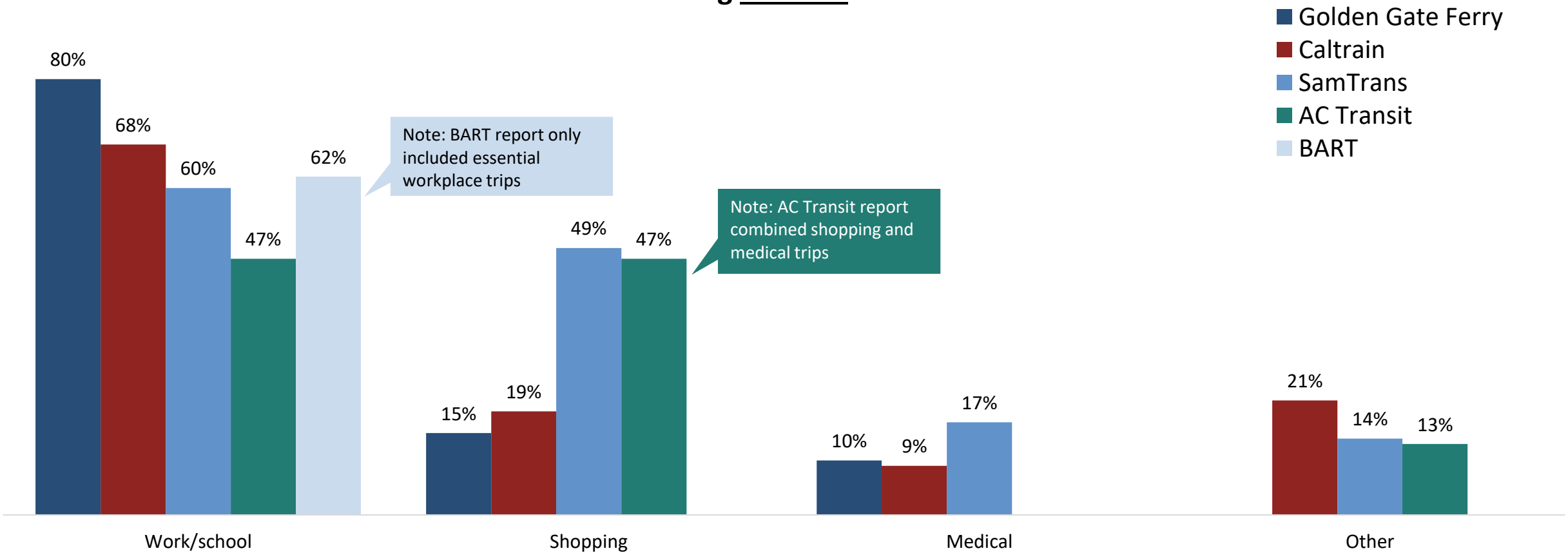
Lost job/cut hours

SamTrans	28%
VTA	17%
Golden Gate Transit	14%
Golden Gate Ferry	12%
Caltrain	14%
AC Transit	6%

Where Are They Going During COVID?

Those still riding transit were mostly going to work, although shopping and errands are significant for the bus services.

Among Current Riders



Demographic Shifts in Ridership

(all data only from
surveys in this report)

Those who were riding transit when these surveys were conducted were generally more likely to be male, lower income, Black, or Hispanic.

	Over Represented <i>Current rider % compared with pre-COVID rider %</i>	Under Represented <i>Current rider % compared with pre-COVID rider %</i>
BART	Men +12 African-American +12 Hispanic +7 Low Income +15	Women -11 White -17 Bachelor's and up -32 Have personal vehicle -24
Caltrain	Hispanic +8 Under \$75,000 annual income +20 \$100,000 - \$124,000 annual income +3	White -9 \$150,000 - \$200,000 annual income -7 \$200,000+ annual income -16
SamTrans	African-American +3 Hispanic +5 Under \$50,000 annual income +22	White -11 \$100,000+ annual income -21
VTA	Men +7 Hispanic +4 Under \$50,000 annual income +13 \$50,000 - \$100,000 annual income +4	Women -6 White -7 \$100,000 - \$200,000 annual income -7 \$200,000+ annual income -10
AC Transit	African-American +7	White -10

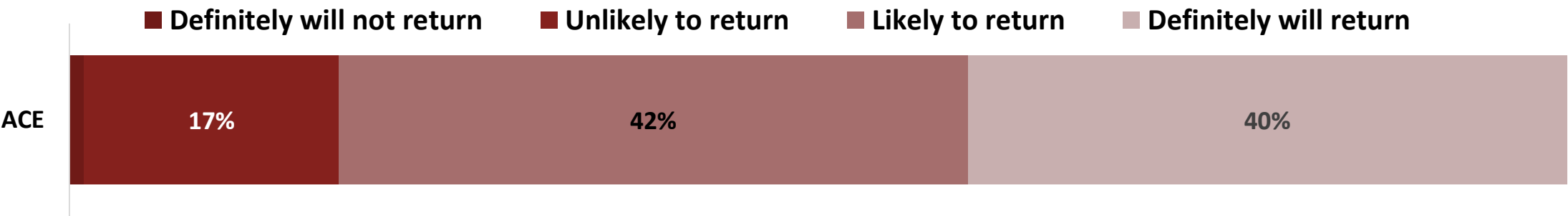
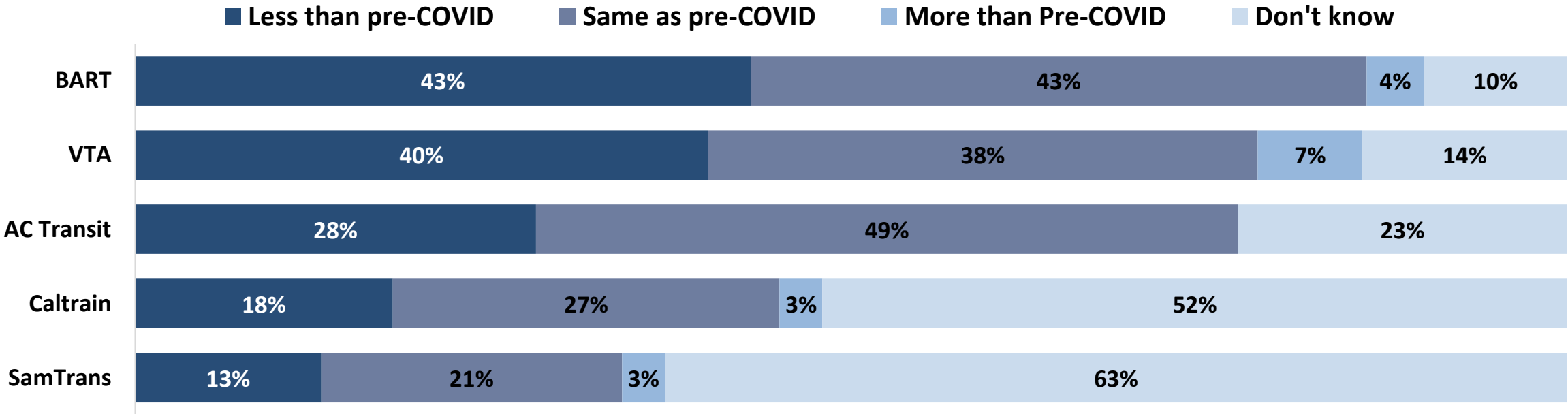
When Will They Return to Transit?

Many riders believed they would return to at least some transit riding **when employers reopen workplaces** and the shelter in place orders are relaxed; **few said they would wait for a vaccine** or cure to consider a return to transit.



Anticipated Post-COVID Ridership

For most agencies, half or more of the former riders surveyed said they would be back to riding after COVID.



Return to Transit Triggers

Offices and schools reopening and the shelter in place being lifted were seen as the two biggest factors for considering a return to transit.



Golden Gate Ferry

When stay at home/shelter order is lifted	55%
When employers/schools open	49%
When transit safety is enhanced	25%



AC Transit

When a treatment/vaccine is developed	33%
When employers/schools open	18%
When stay at home/shelter order is lifted	4%
A month after order is lifted	4%



ACE

When stay at home/shelter order is lifted	25%
When a treatment/vaccine is developed	19%
A month after order is lifted	9%
When employers/schools open	5%



BART

When employers/schools open	43%
When stay at home/shelter order is lifted	19%
A month after order is lifted	15%
When a treatment/vaccine is developed	10%



Golden Gate Transit

When stay at home/shelter order is lifted	50%
When employers/schools open	37%
When transit safety is enhanced	36%
When service increases	35%



Capitol Corridor

When stay at home/shelter order is lifted	29%
A month after order is lifted	13%



VTA

When a treatment/vaccine is developed	28%
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Anticipated Commute Changes

Many riders expect to **telecommute more frequently** than before COVID, and many felt their employers may support **flexible work schedules** to ease commute crowds. For most agencies there is a small segment likely to replace some or all of their transit trips with driving.



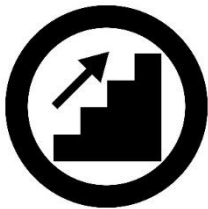
Commute Changes

Many felt they were likely to telecommute more often after the pandemic, and some said they would drive more often.



Telecommute/school at home more often

BART	68%
VTA	59%
Caltrain	48%
ACE	37%
Golden Gate Transit	44%
Golden Gate Ferry	44%
SamTrans	32%
SMART	22%



Phased return to work

Golden Gate Ferry	53%
Caltrain	52%
Golden Gate Transit	50%
SamTrans	35%



Drive more often

Capitol Corridor	76%
WETA	36%
BART	27%
ACE	8%

Flexible/staggered work schedule

Golden Gate Transit	36%
Golden Gate Ferry	36%
Caltrain	28%
SamTrans	28%
ACE	5%



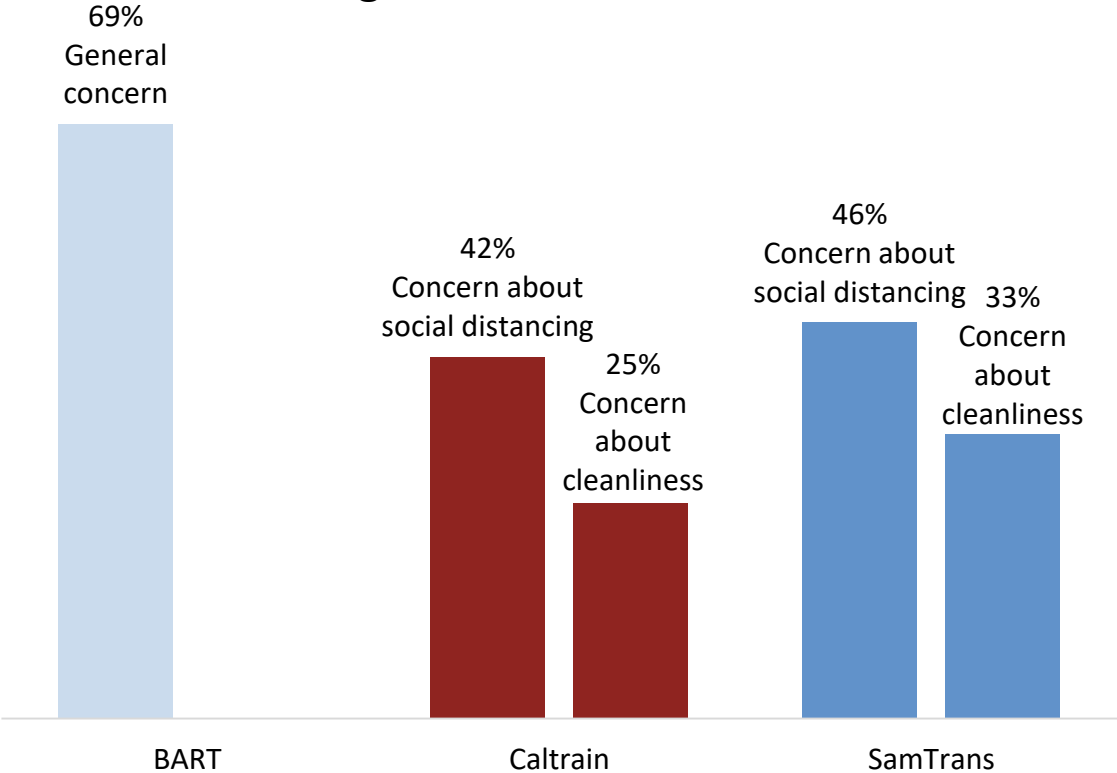
Safety On Transit

The biggest concern both current and former riders have about returning to transit is the **potential for exposure** to the virus. Enforced **mask wearing**, enhanced vehicle and station **cleaning**, **distancing**, and **hand sanitizer** are important both for current and past riders. Clear and consistent **communication** and **visible cleaning and enforcement** were requests.



Many riders were concerned about safety and cleanliness on transit; mandatory face masks and enhanced cleaning were important for them to feel comfortable returning to transit.

COVID-related transit safety concerns during or after Shelter-in-Place



Face masks ranked top safety measure
in Caltrain, SamTrans, AC Transit, VTA surveys
Ranked 2nd most important in SMART survey
Ranked 3rd most important in BART survey



Enhanced cleaning ranked top safety measure
in BART and SMART surveys
Ranked 2nd most important in VTA survey
Ranked 3rd most important in Caltrain and AC Transit surveys

Employer Landscape

Nearly all employers reported that **most or all of their workforce was working remotely** when the surveys were conducted, and most felt they would not ask staff to come back until the **stay at home order was ended**. Many were only starting to work on return to work strategies.

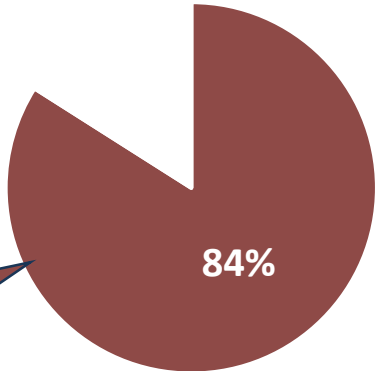


Most employees were working at home at the time of the industry surveys, and many employers were just beginning their return to office planning.

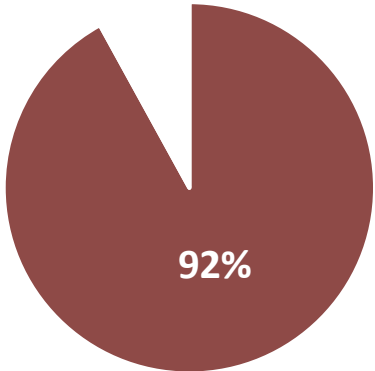
Average % of employees working remotely during SiP

70% of employees will not go back to the workplace until the end of the order

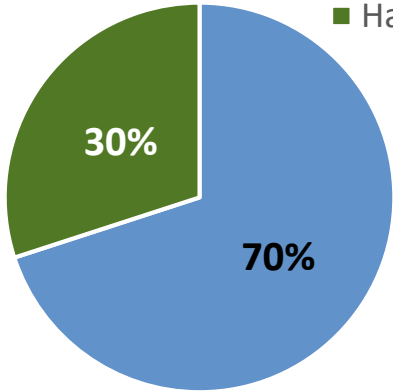
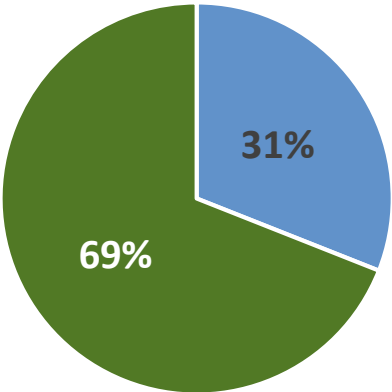
Bay Area Council survey



GoPass employers survey



Return-to-office strategy Planning progress



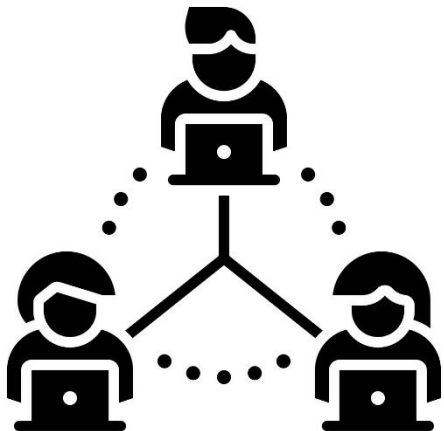
- Finalized return strategy
- Have not finalized return strategy

Employer Adjustments

Many employers said they were willing to continue **allowing employees to work remotely** even when restrictions are lifted, or allow for **flexible work arrangements** such as staggered hours or rotating office shifts. Many employers were also preparing to offer **protective equipment and supplies** for their employees, as well as creating distancing guidelines.



Employers also felt that they were likely to look into more telecommuting, and safety measures in their offices.



Expanded telecommute options

89% of employers surveyed by BAC (short term)

50% of employers surveyed by Leadership Group (long term)

49% of GoPass employers surveyed by Caltrain (long term)

Workplace adjustments

Requiring masks

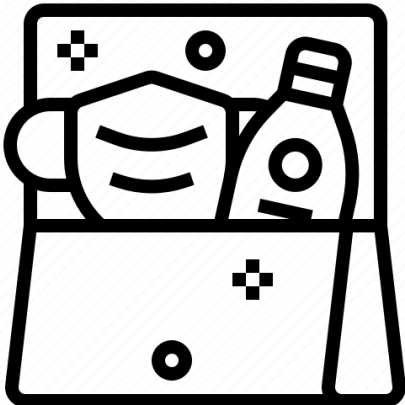
69% of employers surveyed by BAC

72% of employers surveyed by Leadership Group

Enabling social distance in the office

77% of employers surveyed by BAC

73% of employers surveyed by Leadership Group



Employers surveyed by BAC will...

Provide masks	73%
Provide gloves	46%
Provide hand sanitizer	90%

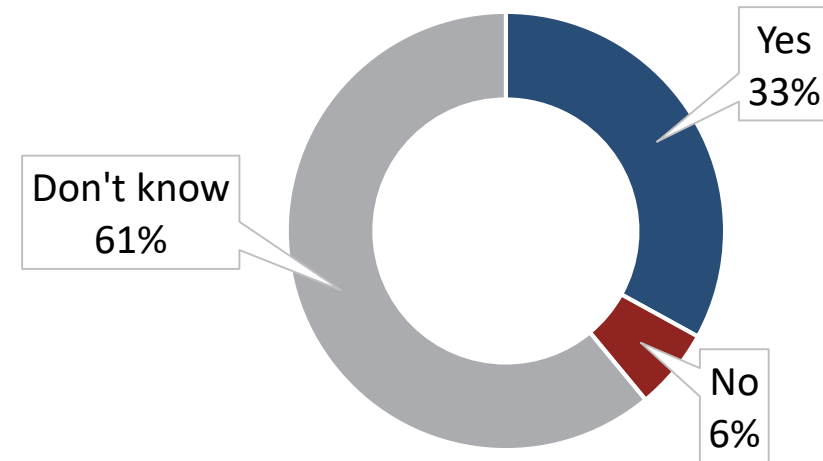
Employer Transit Programs



The Chronicle/Jessica Christian

Employers may be **hesitant to encourage transit use** or shared rides for commuting coming out of the pandemic.

Will your company continue to encourage employees to use transit or shared ride options for their commute?
(among Caltrain GoPASS program employers)





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Appendix – Detailed Description of Past Research (Riders)

Agency	Population	Distribution	Dates	Interviews
ACE Train	Riders	Via e-blast, text alert, social media, agency website	May 15-June 1	1,083
AC Transit	Riders	Via AC Transit's eNews, website, and social media channels; on board AC Transit coaches; community-based organization stakeholder network	June 22-Aug 24	1,531
BART	Riders	Via email invitation to random sample of 5,000 BART riders; data weighted by age, race, and household income in order to be representative of overall BART riders	May 19-May 26	1,239
Caltrain	Riders	Via email, social media, community-based organizations, station VMS signs, news release, agency website	June 22-July 12	1,437
Capitol Corridor	Riders	Via email to subscribers, social media	May 18-May 27	410
Golden Gate Transit (Bus)	Riders	Via web, email, social media	June 1-June 12	694
Golden Gate Ferry	Riders	Via web, email, social media	June 1-June 12	797
SamTrans	Riders	Via email, social media, community-based organizations, station VMS signs, news release, agency website	June 22-July 19	542
SMART	Riders	Via agency communication channels, 65 public and private agencies	May 11-May 17	3,281
VTA	County residents	Mixed-mode hybrid live phone/email to web/text to web survey, offered in English, Spanish, Chinese, and Vietnamese	May 31-June 4	790
WETA	Riders	Via passenger list	Late June/early July	820

Appendix – Detailed Description of Past Research (Employers)



Agency	Population	Distribution	Dates	Interviews
Bay Area Council	CEOs	-	May 13-14	123
Silicon Valley Leadership Group	Employers	-	March 30-31; April 8	100; 74 (two rounds)
Caltrian/GoPass	Employers	Online survey distributed to all 121 Go Pass companies	May 11-May 26	102