

ALAMEDA-CONTRA COSTA TRANSIT DISTRICT



STAFF REPORT

MEETING DATE: 10/14/2020

Staff Report No. 20-376

TO: AC Transit Board of Directors
FROM: Michael A. Hursh, General Manager
SUBJECT: COVID-19 Rider Impact Survey

BRIEFING ITEM

RECOMMENDED ACTION(S):

Consider receiving a briefing on the results of the COVID-19 Rider Impact Survey.

STRATEGIC IMPORTANCE:

Goal - Strong Public and Policymaker Support
Initiative - Service Quality

Receiving direct input from AC Transit riders enables the District to better respond to rider feedback and concerns related to the District's COVID-19 efforts. The District's transparent communication of its response to survey input will ensure a stronger relationship between the District and stakeholders.

BUDGETARY/FISCAL IMPACT:

This is a briefing item and has no direct fiscal impact.

BACKGROUND/RATIONALE:

The COVID-19 pandemic immediately impacted service for AC Transit and its riders, as the shelter-in-place (SIP) order was implemented in Alameda and Contra Costa counties. Service levels were curtailed, and bus capacity limits were enacted to ensure physical distancing was maintained. The District's service is currently 75% of pre-pandemic levels, and ridership is at only 42% of pre-pandemic levels, although that number continues to inch upward. As the District wanted to have a better picture of how the COVID-19 pandemic is impacting its own riders, the External Affairs, Marketing & Communications Department implemented a survey to capture rider sentiment.

Survey Background

The online-only survey was created to provide a snapshot of key rider information. The survey questions were developed with assistance from the Civil Rights, Communications, Legislative Affairs, Marketing, and Planning teams, aligning questions when appropriate with questions from the District's Rider Profile survey. Questions in the intentionally brief survey were focused on:

- rider travel patterns prior to and during SIP,
- anticipated modes and patterns after SIP is rescinded,

- rider perceptions of the District's cleaning practices,
- prioritization of the District's implemented health and wellness measures, and
- ridership and demographic information.

The survey launched on June 22 and was promoted on AC Transit's eNews, website, and social media channels, through door hangers onboard all AC Transit coaches, and emailed to the District's community-based organization stakeholder network. The survey was available in English, Spanish, and Chinese language formats. An ADA accessible version of the survey was developed in early August after survey respondent feedback.

AC Transit's Systems Analysis team provided data analysis on the 1,531 responses collected through August 24 (responses span before and after the August service change implementation) including data refinement through cross-tabulating responses to provide additional insight among those currently riding. During the two-month survey period, priorities and recommendations around the pandemic shifted frequently, and the survey responses captured some of that uncertainty.

Survey Results

The first question asked how concerned riders were about their health during the pandemic with 95% of respondents indicating they were somewhat or extremely concerned about their personal health. The next question gauged ridership before the SIP was implemented. Most respondents indicated they rode frequently-between two and seven days weekly. As the survey intended to target feedback from current or previous riders, the small percentage of respondents who've never ridden AC Transit were disqualified from completing the survey. In response to the initial questions:

- Ridership dropped significantly once the SIP was mandated-more than half the respondents (52%) stopped riding altogether, while 48% continued to ride in some capacity, but only 17% of those responding rode with the same frequency as they had prior to SIP, confirming data previously presented to the Board by the Systems Analysis team.
- When asked about the reasons their ridership frequency changed, 32% of respondents were complying with SIP and 24% began working from home. Multiple responses could be selected for this question and only 19% reported that health and safety concerns were one of the reasons their ride frequency had changed. Nearly 40% of the respondents who continued to ride AC Transit during SIP were taking essential trips to run errands like grocery shopping or to medical appointments. A number of respondents also used the bus to get to work.

Anticipated Future Ridership

In asking about anticipated future travel patterns:

- 49% of the responding riders intend to resume their previous ride frequency once the SIP is lifted, while another 20% will continue to ride, but less often. Only 8% of respondents indicated they are unlikely or confirmed they will no longer ride.
- Responses to the question posed about the timing or circumstance in which riders are likely to return to pre-pandemic riding levels are varied. The most common responses were when a vaccine is available; unsure/don't know; or when their work or school reopens.
- When cross-tabulated with responses about pre-pandemic ride frequency (question two), the overall percentages track similarly across all rider groups (frequent, less frequent, and occasional riders).

However, closed workplaces and school campuses play a more significant role in intended resumption of pre-pandemic ride frequency for frequent riders than it does for less frequent or occasional riders.

Health and Wellness Practices

When riders were asked their thoughts about the health and wellness tactics that AC Transit has implemented since the pandemic's start:

- Only 9% indicated that AC Transit is not doing enough to keep operators and riders safe; the remainder of responses were split nearly evenly between respondents affirming that we are doing enough and respondents indicating that they were unsure. When this question's responses were cross-tabulated with the responses to current ridership in question three, the percentages shift-2/3 of SIP riders believe the District is doing enough to keep riders and operators safe-conversely, 2/3 of people currently not riding are unsure.
- From the difference in these responses, it could be surmised that people currently riding are more attuned with the District's health and wellness measures as communicated through the established communication channels, or these riders are seeing the practices in action while riding buses. Non-riders might not be as attentive to the in-market messaging, since the need is not as urgent for them. Some of the 9% who feel the District is not doing enough noted concerns about overcrowding on buses, mask enforcement of both drivers and riders, and a lack of clarity about the frequency of bus sanitization (or a lack of confirmation that coaches are being disinfected regularly).
- Those surveyed were asked to prioritize the importance of specific health and wellness tactics. The majority of all riders, regardless of whether they were riding during SIP or not, indicated that the enforcement of mask-wearing on our buses and a social distance buffer on buses were the most important safety measures to employ.
- Of all queried riders, 77% were more likely to ride if a six-foot social distance was maintained, and that drops to 44% if only a three-foot allowance were maintained. Of the frequent riders surveyed who have been riding AC Transit more than twice a week (998) during the pandemic, 41% responded that they were very likely to ride the bus if the number on each bus is limited to allow for six feet of social distance, and 14% were very likely to ride if the number of the riders on each bus is limited to allow for three feet of social distance. Only about 10% are very likely to ride if the number of riders on each bus is not limited and riders choose their own social distance.

Survey Demographics

Given that this was not a controlled survey, the rider profile and demographics of the survey's respondents are atypical of our general ridership. 66% of the respondents had access to a vehicle, while 97% had a phone and sufficient data access to use the Internet. 55% of those surveyed were white and the most ridden lines were the 51A, 18, 72, 57, and 6 lines. 65% had an annual income of \$50,000 or higher and a majority of the respondents self-identified as female. Average/median age of this survey's respondents skews older than our typical weekday ridership-about 66% of the respondents were 45 or older. Only 18% spoke a language other than English at home.

These findings differ from our most recently published rider profile which lists that half of AC Transit riders were between the ages of 25-44, 57% had access to a vehicle, a more even split in gender of riders - 51%:49% male to female. There is a noticeable difference in smart phone ownership - 82% (low income) and 93% (non-low income) riders, and a major difference in household income where 71% of weekday riders had annual household income of less than \$50,000. In addition, 74% of weekday riders spoke a language other than

English at home. We attempted to provide some mitigation for the demographic differences between our most recent rider profile and this survey by separating the responses of SIP riders and those who are not through cross-tabulating relevant questions.

Summary and Next Steps

The overall survey takeaways:

- Many AC Transit riders stopped riding because of the SIP mandate, or because they started working from home.
- Most riders expect to resume riding at or near pre-pandemic levels once SIP is lifted.
- Riders are expecting a vaccine to be implemented or workplace/schools to reopen before they start riding again, or are not sure what will trigger riding again.
- Many riders think the District is doing enough to ensure operators and riders remain healthy while riding. This is especially true for current riders. People not riding during SIP are less certain about the District's practices. A small percentage don't think we are doing enough.
- The majority of survey responders believe that the enforcement of mask wearing and the maintaining of social distancing are the most important practices to be used to ensure the likeliness of ridership. The likelihood of ridership decreases as the social distance circumference shrinks.
- Respondents were generally atypical from ridership demographics presented in our most recent rider survey-more respondents were white, earned more than \$50,000 annual household income, rode more lines with a lower average ridership, and a higher percentage had access to a car. Segregating responses by current ridership attempted to provide a more balanced picture.

The District's departments will use this data to:

- craft messaging that confirms to riders and stakeholders that the District is already doing a good job of meeting rider health and safety needs,
- assure riders of our continued implementation of health and wellness practices,
- provide greater transparency into the efforts we are undertaking to enforce mask wearing and maintaining six-foot social distancing parameters, and
- ensure these efforts are visible across all our existing communication channels to increase rider and stakeholder visibility.

The District will continue to adhere to its COVID-19 recovery plan; this plan has been shared with our community as the AC Transit reNEW plan and follows or exceeds guidelines established by the Bay Area Healthy Transit Plan. The District's Media Affairs and EAMC departments will continue to promote and communicate updates to reNEW as elements continue to be developed and refined.

ADVANTAGES/DISADVANTAGES:

There are several advantages in surveying our riders on the impact of COVID-19. Getting direct feedback provides a more accurate census of rider views on AC Transit's implemented solutions, and the opportunity to receive qualitative feedback about ridership patterns is critically important. There are no disadvantages to

receiving this briefing.

ALTERNATIVES ANALYSIS:

This survey was intended to provide a snapshot of current sentiment based on voluntary responses and was intentionally designed to quickly capture specific rider information related to COVID-19 rider impacts. Staff evaluated alternative options of hiring a research firm as well as utilizing other market research tactics; these options could have provided additional insight by offering a participant sample more representative of our rider population and minimizing result skew. In order to produce results in a timely manner, avoid the complexities of in-person surveying during the pandemic, and keep survey costs low, staff elected a less formal methodology.

PRIOR RELEVANT BOARD ACTION/POLICIES:

20-302 - Consider adopting the COVID-19 recovery plan

20-042 - Resolution endorsing the Ride Together: Bay Area Healthy Transit Plan

ATTACHMENTS:

1. COVID-19 Rider Survey Presentation
2. COVID-19 Rider Survey Questions and Response Analysis
3. AC Transit reNEW plan

Prepared by:

Nichele Laynes, Marketing Manager

In Collaboration with:

Eden Gerson, Marketing Administrator

Campbell Jung, Manager of Systems Analysis

Julia Kocs, Communications Manager

Approved/Reviewed by:

Beverly Greene, Executive Director of External Affairs, Marketing & Communications

Claudia Burgos, Director of Legislative Affairs & Community Relations

Robert del Rosario, Director of Services Development and Planning