

**To:** Marketing, Planning, & Legislative Committee

**Date:** 01/02/2024

**From:** Pranjal Dixit, Manager of Planning

**Reviewed by:** MR

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**SUBJECT: Onboard Passenger Survey**

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### **Background:**

County Connection has historically conducted an onboard passenger survey about every three years. These surveys are used to inform planning decisions and for triennial Title VI program updates and equity analyses. The Metropolitan Transportation Commission (MTC) manages a regional transit passenger survey program and conducts surveys on each of the fixed-route transit operators in the Bay Area on a rotating schedule. However, those surveys are only conducted for each operator every five to seven years, so County Connection staff have led additional survey efforts to supplement the regional program.

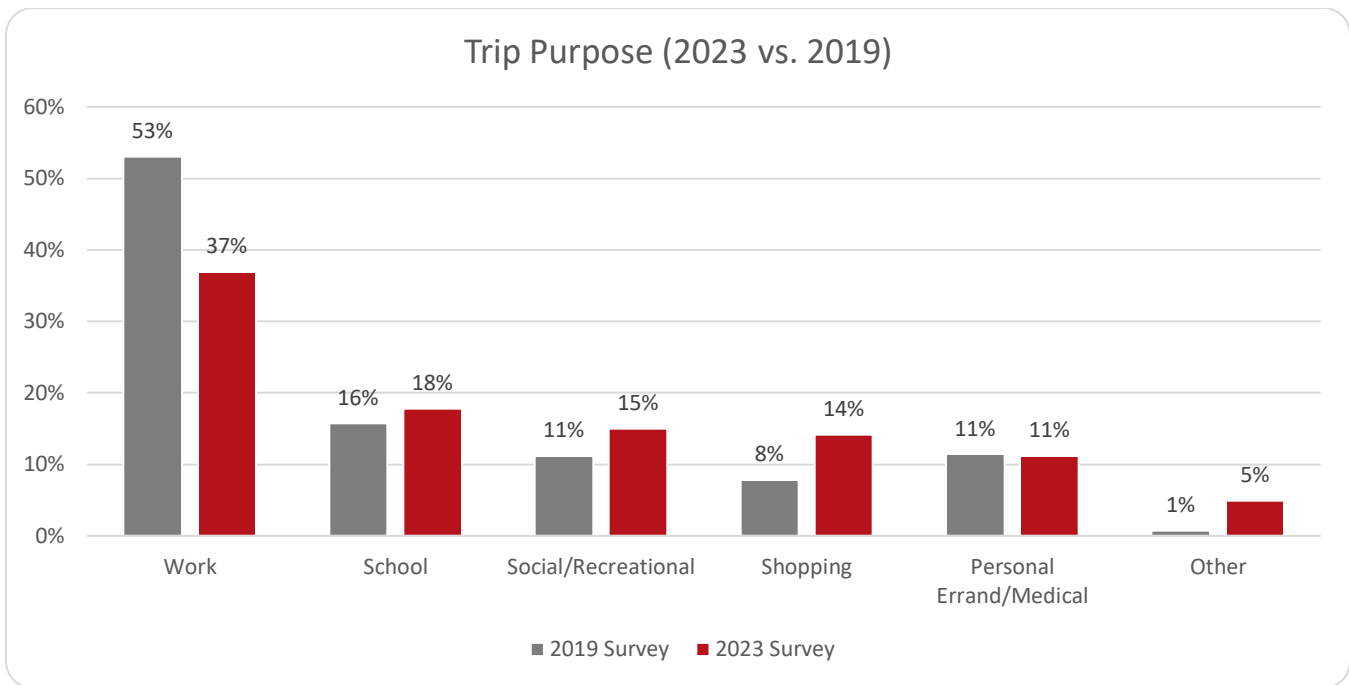
The last onboard survey of County Connection's passengers was completed by MTC in fall of 2019, but the pandemic has delayed MTC's surveying schedule such that the next survey on County Connection will not be until 2027. Given the significant shifts in travel patterns as a result of the pandemic as well as a Title VI program update due in March, staff utilized the on-call planning contract with Transportation Management & Design (TMD) to conduct an onboard survey during Fall 2023.

### **Survey Results:**

Between mid-October to early November of 2023, surveyors collected a total of 872 responses, including 625 responses on weekday routes, or about 8% of average weekday ridership, and 138 responses on weekend routes, or about 7% of average weekend ridership. A smaller sample of 109 surveys was collected for 600-series school routes. However, obtaining reliable survey results on school routes has always been a challenge, and responses were heavily skewed towards a handful of routes. Thus, the following results exclude responses from 600-series routes.

### Shifting Travel Patterns

The pandemic has significantly reshaped how riders use our buses. Commuting trips, which pre-pandemic dominated with over half of respondents, have dropped noticeably to 37%. This shift is balanced by a rise in social, recreational, and shopping trips, now used by nearly one-third of passengers.



Nearly half (47%) rely on transfers to complete their journeys, with 34% connecting to BART and 10% to other County Connection buses. Notably, 68% of respondents indicated that they either walked or biked in order to get to and from transit.

The rise of remote work is reflected in the survey data—27% of respondents work or attend school entirely remotely or commute only 1-2 days per week. However, over half of the respondents (54%) indicated that they commute 5 or more days a week, which suggests that many riders are essential workers with jobs that require them to be in-person.

#### Fare Payment

On the routes that required a fare payment, 64% of respondents indicated that they paid their fare using Clipper whereas 28% of respondents paid using cash. Clipper usage dipped from 2019's levels, likely due to a combination of lower demand on commuter express routes—where Clipper adoption was higher—and the conversion of four additional routes to fare-free routes.

#### Rider Demographics

The table below shows a comparison of select County Connection rider demographics to those of Central Contra Costa County as well as the 2019 survey. The highlighted rows reveal key differences between County Connection riders and residents of Central Contra Costa. Bold text and accompanying arrows indicate significant changes compared to the 2019 survey, offering insights into evolving ridership trends post-pandemic.

Overall, County Connection riders tend to have fewer vehicles available, larger household sizes, and lower annual incomes compared to residents of Central Contra Costa. They are also more likely to be minority and speak a language other than English at home.

There were some notable shifts in rider demographics since the 2019 survey. Although vehicle availability and household incomes were higher, household sizes were also much larger, with over half having 4 or more people. In addition, the change in income levels does not account for inflation, and when considering the combination of household income and size, the percentage of households considered to be low-income stayed relatively constant compared to 2019. Another significant change has been an increase in minority—particularly Hispanic or Latino—and Spanish-speaking riders.

	County Connection Riders (2023) <sup>(1)(2)</sup>	County Connection Riders (2019)	Central Contra Costa Residents <sup>(3)</sup>
<b>Vehicles Available</b>			
No vehicles	<b>28%</b> ▲	21%	5%
1 vehicle	<b>25%</b> ▼	46%	30%
2 vehicles	24%	27%	40%
3 or more vehicles	<b>23%</b> ▲	6%	25%
<b>Household Size</b>			
1 person	11%	11%	25%
2 people	<b>13%</b> ▼	20%	34%
3 people	24%	28%	17%
4 or more people	<b>52%</b> ▲	41%	24%
<b>Annual Household Income</b>			
Less than \$25,000	<b>17%</b> ▼	26%	8%
\$25,000-\$50,000	42%	40%	9%
\$50,000-\$75,000	19%	19%	9%
\$75,000-\$100,000	<b>13%</b> ▲	7%	9%
More than \$100,000	9%	8%	65%
<b>Low-Income Status (&lt;150% poverty level)</b>			
Low-Income	41%	44%	9%
Non-Low Income	59%	56%	91%
<b>Age</b>			
Under 19	8%	6%	23%
19-34	<b>37%</b> ▼	47%	16%
35-54	33%	31%	28%
55-64	9%	9%	14%
65+	13%	7%	19%
<b>Race</b>			
White	<b>37%</b> ▼	44%	61%
Hispanic or Latino origin	<b>27%</b> ▲	19%	16%
Black or African American	20%	19%	4%
Asian	11%	13%	18%
Other	5%	5%	1%
<b>Minority Status</b>			
Minority	<b>63%</b> ▲	56%	39%
Non-Minority	<b>37%</b> ▼	44%	61%
<b>Language Spoken at Home</b>			
English	63%	70%	72%
Spanish	<b>26%</b> ▲	17%	10%
Other	12%	13%	18%

**Notes:**

Highlighted rows indicate key differences between County Connection riders and residents of Central Contra Costa.

(1) Percentages exclude those who did not respond to the particular question.

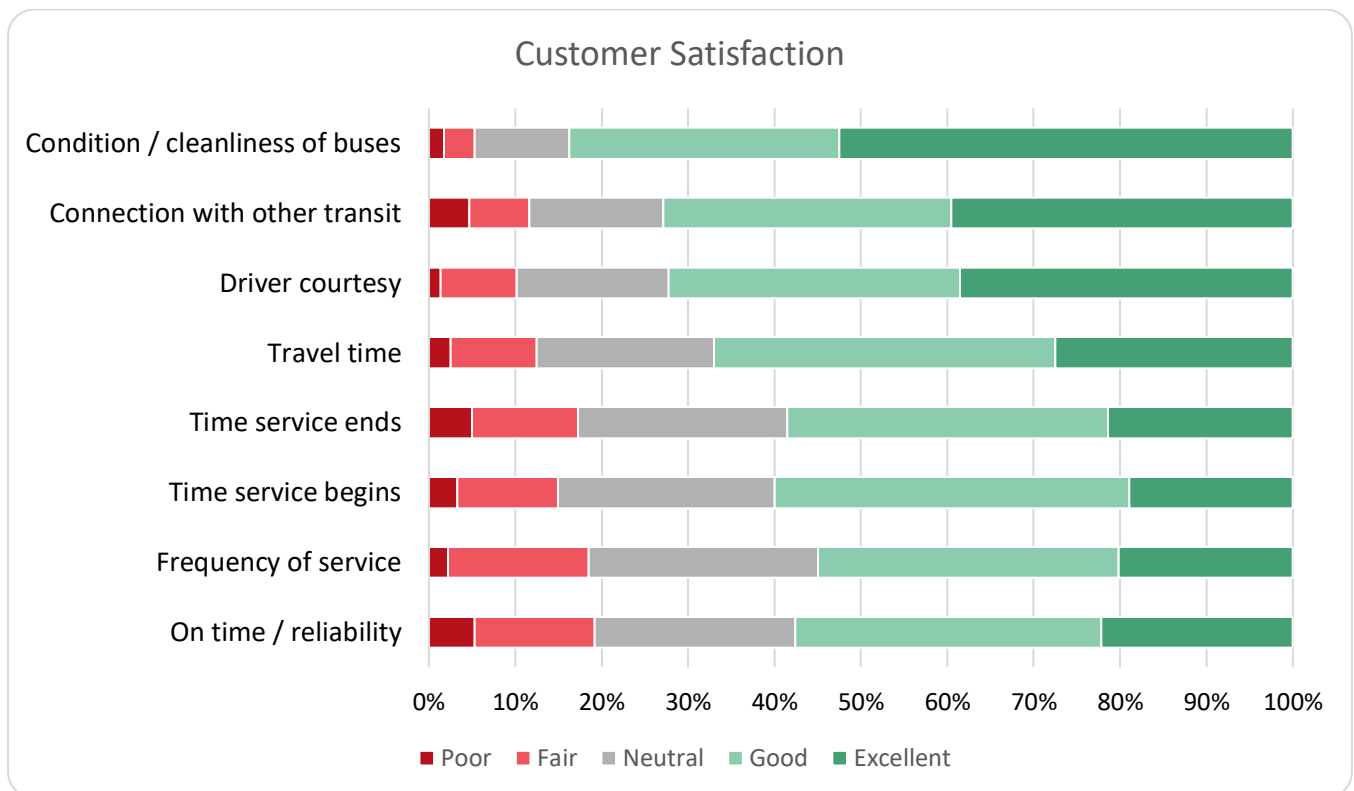
(2) **Bold** values and accompanying arrows indicate significant changes compared to the 2019 survey.

(3) Based on 2022 American Community Survey 5-year estimates

### Customer Satisfaction

Among the top service improvement requests, 26% of respondents desired more frequent service, while 19% expressed a need for earlier or later start/end times, 17% requested extended weekend service, and 17% wanted more direct service.

Overall, the majority of riders are satisfied with County Connection’s services. Notably, cleanliness of buses, connection with other transit, and driver courtesy received high marks from riders. However, factors related to service levels such as frequency and span received lower rankings.



### **Financial Implications:**

The cost to conduct the survey was \$50,000, which was included in the Service Development budget for FY 2024.

### **Recommendation:**

None, for information only.

### **Action Requested:**

None, for information only.

### **Attachments:**

Attachment 1: 2023 Survey Instrument

# 2023 CCCTA Passenger Survey



We are looking for feedback on how to improve public transportation services provided by County Connection. Your information and responses will be used for transportation planning purposes only. Thank you for your help!

## TRIP CHARACTERISTICS

1. Where did you **begin** your trip today?

Address, Intersection, or Landmark:

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City, Neighborhood, or ZIP Code:

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Type of Place:

- Home
  - Work
  - School / College (student only)
  - Shopping
  - Social / Recreational
  - Personal Errand / Medical
  - Other (specify):
- 

2. Where will you **end** your trip today?

Address, Intersection, or Landmark:

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City, Neighborhood, or ZIP Code:

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Type of Place:

- Home
  - Work
  - School / College (student only)
  - Shopping
  - Social / Recreational
  - Personal Errand / Medical
  - Other (specify):
- 

3. What route are you currently riding?

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4. Does this trip include any transfers?

- No
- Yes



If yes, **select all that apply:**

County Connection (which route(s)?)

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- BART
  - Tri Delta Transit
  - WestCAT
  - Wheels
  - Solano Express
  - Altamont Commuter Express (ACE)
  - Amtrak / Capitol Corridor
  - Other (specify):
- 

5. How did you get to your first transit stop on this trip?

- Walked or used a wheelchair
  - Rode my bicycle
  - Drove myself
  - Taxi / Uber / Lyft
  - Someone gave me a ride
  - Other (specify):
- 

6. How did you pay your fare today?

- Cash
  - Clipper Card – Single Ride
  - Clipper Card – 31-Day Pass
  - Employer Pass
  - School Pass / Pass2Class
  - Amtrak / ACE Transfer
  - No fare required (free route)
  - Other (specify):
- 

7. Which fare category did you pay?

- Adult
  - Senior
  - Disabled
  - Youth
  - Clipper START
  - N/A – free route
  - Other (specify):
- 

## RIDING CHARACTERISTICS

8. How often do you ride County Connection?

- More than 5 days a week
- 4-5 days a week
- 2-3 days a week
- 1 day a week
- Less than 1 day a week

9. What are your reasons for choosing to ride County Connection for this trip? (select all that apply):

- Cost
  - Prefer public transit to driving
  - Avoid traffic / parking
  - No car available
  - Not able to drive
  - Other (specify):
- 

10. How would you have made this trip if County Connection had not been available?

- Drive own vehicle
  - Carpool / Vanpool
  - Taxi / Uber / Lyft
  - Ride bicycle
  - Walk
  - Would not make the trip
  - Get a ride with a friend / family member
  - Other (specify):
- 

## DEMOGRAPHIC INFORMATION

11. What is your employment status?

- Employed full time (35 or more hours a week)
- Employed part time
- Not employed

**TURN OVER**

- 12.** Are you a student?
- Full-time student
  - Part-time student
  - Not a student
- 13.** On average, how many days per week do you commute to work or school?
- 1-2 days a week
  - 3-4 days a week
  - 5 or more days a week
  - None, completely remote
  - N/A – I don't work or attend school
- 14.** What is your home ZIP Code?
- \_\_\_\_\_
- 15.** Including you, how many people live in your home?
- \_\_\_\_\_
- 16.** How many vehicles (autos or motorcycles) are available to your household?
- \_\_\_\_\_
- 17.** What is your approximate annual household income?
- Less than \$10,000
  - \$10,000 to \$24,999
  - \$25,000 to \$34,999
  - \$35,000 to \$49,999
  - \$50,000 to \$74,999
  - \$75,000 to \$99,999
  - \$100,000 to \$149,000
  - \$150,000 or more
- 18.** Which of the following do you identify with?
- White
  - Black/African American
  - Hispanic/Latino
  - Asian
  - Native Hawaiian/ Pacific Islander
  - American Indian/Alaskan Native
  - Other (specify): \_\_\_\_\_

- 19.** Do you speak a language other than English at home?
- No
  - Yes
- If yes, **please specify:**
- Spanish
  - Tagalog/Filipino
  - Chinese
  - Hindi
  - Persian/Farsi
  - Other (specify): \_\_\_\_\_

- 20.** How well do you speak English?
- Very well
  - Well
  - Not well
  - Not at all

- 21.** What is your gender?
- Male
  - Female
  - Non-binary
  - Prefer not to answer

- 22.** What is your age?
- 18 or under
  - 19 to 34
  - 35 to 54
  - 55 to 64
  - 65 to 74
  - 75 or older

## INFORMATION ACCESS

- 23.** How do you access the Internet? (select all that apply):
- Smartphone
  - Computer at home
  - Computer at work or school
  - Tablet
  - I don't access the Internet
- 24.** How do you typically obtain information about County Connection (e.g., schedules, arrival times, service updates)? (select all that apply):
- Printed schedules
  - County Connection website
  - Social media (specify): \_\_\_\_\_
  - Mobile app (specify): \_\_\_\_\_
  - At the bus stop
  - Bus driver
  - Customer service call center
  - Other (specify): \_\_\_\_\_

## CUSTOMER SATISFACTION

- 25.** Which of the following would encourage you to use County Connection more? (select all that apply):
- Nothing
  - More frequent service
  - More direct service
  - Buses run earlier
  - Buses run later
  - More reliable service
  - Lower fares
  - Cleaner buses
  - More service on weekends
  - Other (specify): \_\_\_\_\_

**26.** How do you rate County Connection in the following areas?

Characteristics	Poor	Fair	Neutral	Good	Excellent
On time / reliability	○	○	○	○	○
Frequency of service	○	○	○	○	○
Time service begins	○	○	○	○	○
Time service ends	○	○	○	○	○
Travel time	○	○	○	○	○
Driver courtesy	○	○	○	○	○
Connection with other transit	○	○	○	○	○
Condition / cleanliness of buses	○	○	○	○	○