County Connection

INTER OFFICE MEMO

To: Marketing, Planning & Legislative Committee **Date:** 09/25/2017

From: Ruby Horta, Director of Planning & Marketing **Reviewed by**:

SUBJECT: Fixed Route Community Survey

Background:

Earlier this year, County Connection selected Stantec to conduct a community survey. It had been more than 20 years since County Connection completed a community survey, which targets non-riders. Conversely, on-board surveys are conducted more regularly, approximately every three years.

The survey covered travel modes and behaviors, previous use of public transit options, brand recognition and attitudes towards public transit. Questions about transportation network companies (TNC's), such as Uber and Lyft, were also included. The community survey was conducted primarily using SurveyMonkey.

Key Findings

Of the 2,940 survey respondents, 70-percent do not regularly use County Connection, while 30-percent identified as regular or occasional County Connection riders. This mixture of riders and non-riders is the results of the online survey, in which participants are self-selected. Because this was a survey conducted by County Connection, it likely gained the attention of current riders who have a strong opinion that they wish to share, while non-transit users may have been less likely to complete the survey. To address this sampling bias, the survey featured a set of questions dedicated to non-riders. Furthermore, the results have been cross-tabulated to identify any trends that pertain to non-riders.

County Connection Awareness & Brand Recognition

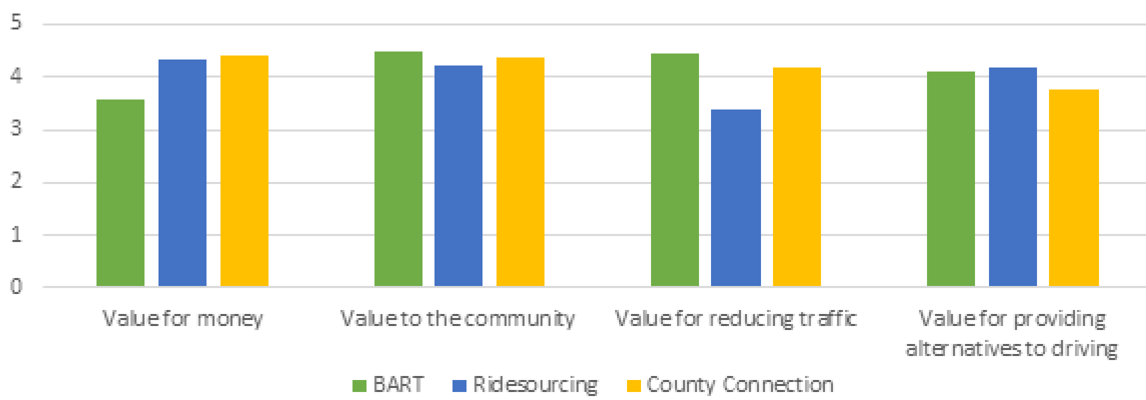
The County Connection brand has high awareness among survey respondents, with only 10-percent indicating that they had no knowledge of County Connection and 90-percent saying they had "high" or "some" familiarity of County Connection. Unsurprisingly, current riders primarily stated they had "high familiarity", while non-riders stated that mainly had "some familiarity" of County Connection. For comparison, the survey also asked brand awareness questions for BART and ridesourcing (i.e. Uber and Lyft). While County Connection's brand awareness was relatively high, it still trailed behind ridesourcing, with only 4.5-percent indicating they had no knowledge of Uber or Lyft. Virtually all respondents had heard of BART, with less than half a percent indicating no knowledge.

Respondents were asked how they learned about County Connection. For non-riders, the top source indicated was seeing buses on the road (81-percent), followed by encountering buses or signage at BART stations (48-percent). Respondents were also asked whether they know where the County Connection bus stop closest to their home is located. 60-percent of non-riders indicated that they indeed know where to find the bus stop closest to their home. These responses demonstrate the value that County Connection's physical assets and presence have in creating brand awareness in the community.

Value of Transportation Services

Respondents were asked to rate BART, ridesourcing, and County Connection in terms of value for money, value to the community, value for reducing traffic congestion, and value for providing an alternative to driving. County Connection was rated highest in terms of value for money (4.4 of 5), but was rated lowest in providing an alternative to driving (3.8 of 5). County Connection rated close to, but just below BART in terms of its value to the community and its value for reducing traffic congestion.

Fig. 1 - Value of Transportation Services



Non-riders were asked the likelihood that they will use County Connection's bus services in the future. Approximately two-thirds of respondents said that it is unlikely or that there is no chance at all that they will use County Connection in the future. However, 6.5-percent said that they were very likely to use County Connection. Another 31-percent indicated that they were somewhat likely, indicating that there is interest among residents in using the bus system, but that there are probably some barriers, that must be overcome to encourage greater use of the service. Some of these barriers are identified below.

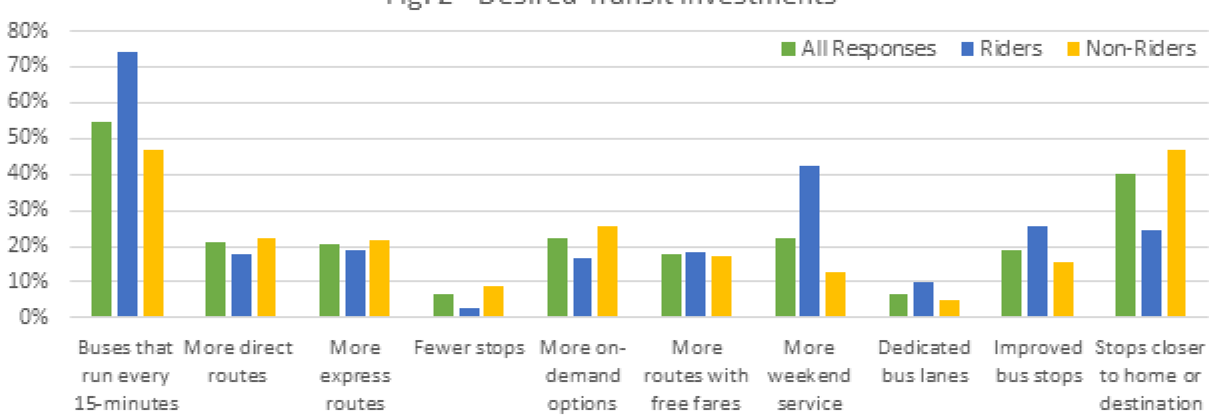
Desired Investments and Improvements

Respondents were asked to select up the three top priorities for future investment in their community. The top three options among all respondents were (1) expand public transportation, including trains, buses, and on-demand options (80-percent); (2) maintain and repair existing roads, highways, and freeways (65-percent); and (3) build more sidewalks, bike lanes, and paths (29-percent). These top three priorities remain the same when examining only non-rider responses, however the percentages of each shift. For respondents who indicate they currently ride County Connection or BART, the support for expanded public transportation reaches 90-percent.

BART riders were asked to select the reasons they drive to BART instead of ride County Connection. For regular BART commuters who ride at least once a week or more, the top reasons indicated were that County Connection buses are too infrequent (47-percent) and that the bus takes too long (37-percent). This indicates a desire for more frequent service and travel times that are more competitive with private vehicles.

Finally, respondents were asked to select up to three investment priorities that would make them more likely to ride County Connection. Among all respondents, the top three options were (1) buses that run every 15-minutes; (2) stops closer to home or destination; and (3) more on-demand options. The top three selections remain unchanged when cross-tabulated for non-riders and frequent BART riders. For current riders, 15-minute bus service remains an overwhelming top request with 74-percent. However, more weekend service moves up to become the second highest request for current riders, followed by improved bus stops. This indicates that there are some differences in investment priorities required to attract new customers vs. retaining customers or encouraging greater use of the system from existing customers.

Fig. 2 - Desired Transit Investments



Profile of Respondents

Most respondents were 35 and over and the survey received a strong participation from seniors aged over 64. Most respondents are female and the average income reported was $100,000 or more, which is not necessarily reflective of the central Contra Costa County community, but may be a result of personal willingness to complete an online survey. There was some overrepresentation from San Ramon, Danville, Alamo, Lafayette, Moraga, and Orinda, with underrepresentation from Concord, Martinez, and Clayton. 85-percent of non-riders reported driving as their primary mode of travel.

Recommendation:

For information only.

Financial Implications:

None.