

To: Board of Directors

Date: 01/11/2018

From: Ruby Horta, Director of Planning & Marketing

Reviewed by:

SUBJECT: 2017 Fixed Route Community Survey - Final Report

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

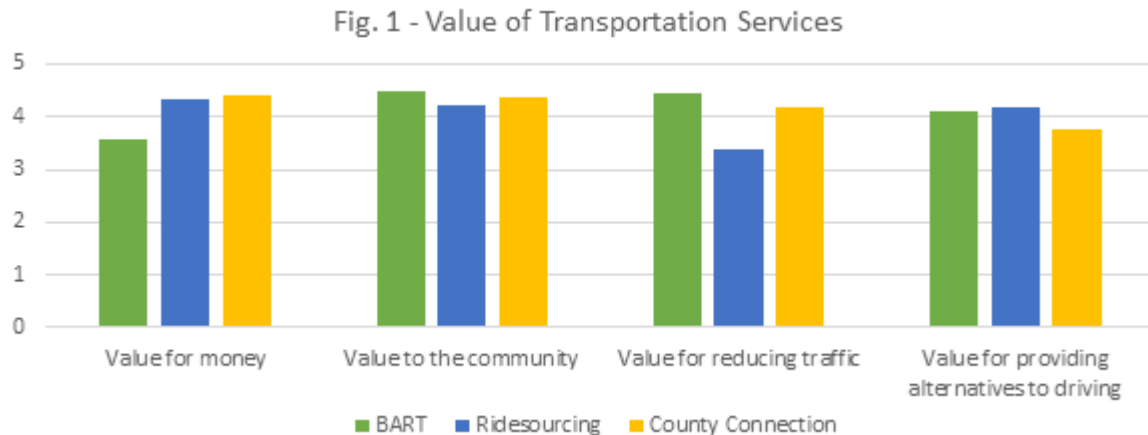
The County Connection brand has high awareness among survey respondents, with only 10-percent indicating that they had no knowledge of County Connection and 90-percent saying they had "high" or "some" familiarity of County Connection. Unsurprisingly, current riders primarily stated they had "high familiarity", 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.



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.

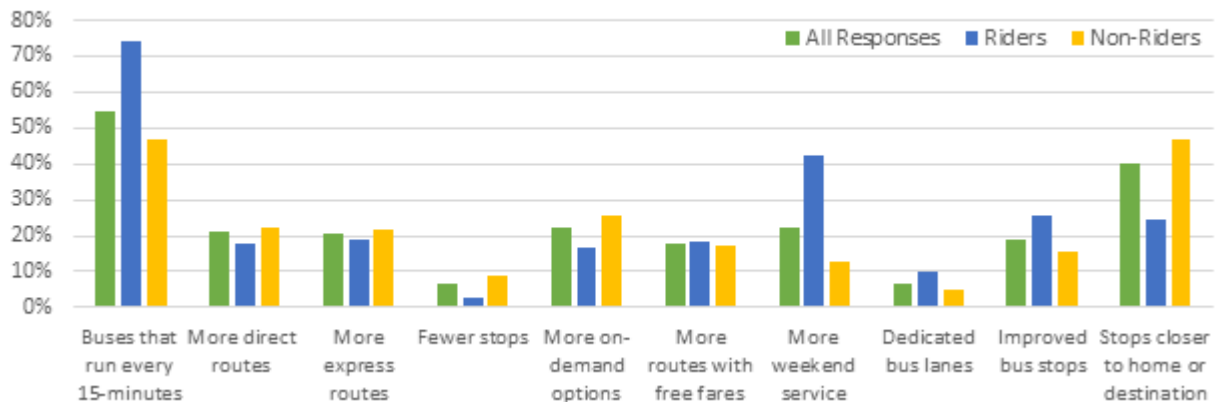
Desired Investments and Improvements

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:

The MP&L Committee recommends that the Board accept and file the 2017 Fixed Route Community Survey – Final Report.

Financial Implications:

None.

Central Contra Costa Transit Authority

2017 Fixed Route Transit Community Survey

Final Report • December 2017





**2017 Fixed Route Transit
Community Survey**

Final Report

December 15, 2017

Prepared for:

Central Contra Costa Transit Authority
(County Connection)

Prepared by:

Stantec Consulting Inc.

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EXECUTIVE SUMMARY

The Central Contra Costa Transit Authority (County Connection), along with Stantec, conducted a community survey for residents during summer 2017. County Connection conducts on-board surveys approximately every three years and has a good understanding of who its riders are and how they use the service. However, a comprehensive community study that includes non-riders had not been conducted in the past 20 years. The community survey was open to all residents and was successful in reaching a different audience than the on-board surveys, with 50-percent of respondents identifying as non-riders and an additional 20-percent identifying as former County Connection riders.

The community survey queried typical travel modes and behavior, previous use of and brand recognition of County Connection, and attitudes towards public transit. Questions were developed to provide County Connection with an understanding of how the agency can best serve residents of Central Costa County, what improvements residents would like to see, and whether these improvements can encourage greater use of the system. The results of this survey can help inform service changes, route restructuring, and other investments made by County Connection.

Methodology

The community survey was conducted primarily online utilizing SurveyMonkey in two phases. In the first phase, residents were mailed postcard invitations asking them to complete an online survey. Residents without access to the Internet were provided a phone number to request a paper copy of the survey. The purpose of the first phase was to reduce sampling bias in the survey results by randomly selecting households evenly across County Connection's service area. Approximately 200 surveys were received as part of phase one.

In the second phase, the online survey was widely distributed to the community through various online platforms. The survey was shared on County Connection's social media platforms including Facebook, Twitter, and Nextdoor. Municipal partners were asked to share the survey on their website, newsletters, and social media pages. The survey was also shared by 511 Contra Costa via their website, Facebook and Twitter pages, eNewsletter, and SchoolPool program letters. Approximately 2,740 surveys were received as part of phase two.

Profile of Respondents

Of the 2,940 survey respondents, 70-percent are not regular County Connection users, while 30-percent identified as regular or occasional County Connection riders. This mixture of riders and non-riders is the product of the online survey, where participants were self-selected. Because this was a survey conducted by County Connection, it likely gained the attention of current riders with a strong opinion 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.

2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

The majority of respondents were 35 and over with a strong participation from seniors age 64 and over. Most respondents were female and the average income reported was \$100,000 or more. There was some overrepresentation from Danville and Moraga, with underrepresentation from Concord and Martinez. 85-percent of non-riders reported driving as their primary mode of travel.

Key Findings

The survey found that the County Connection brand has high awareness among survey respondents.

Only 10-percent of non-riders indicated that they had no knowledge of County Connection. For comparison, the survey also asked brand awareness questions for BART and ridesharing (i.e. Uber and Lyft). While County Connection's brand awareness was relatively high, it trailed behind ridesharing, with only 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.

County Connection's physical assets and presence have created brand awareness in the community.

Respondents were asked how they learned about County Connection. Non-riders indicated seeing buses on the road as the top source of recognition (81-percent), followed by seeing buses or signage at BART stations (48-percent). Respondents were also asked if they know the location of the County Connection bus stop closest to their home. 60-percent of non-riders indicated that they do know where to find the bus stop closest to their home.

County Connection was rated the highest, relative to BART and ridesharing, in terms of value for money, but rated lowest in providing an alternative to driving.

Respondents were asked to rate BART, ridesharing, 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), demonstrating that residents see local transit as an important service to their community, but its low rating in providing an alternative to driving (3.8 of 5) shows that residents may have trip patterns that cannot be met by existing transit services. County Connection rated close to but just below BART in terms of its value to the community and its value for reducing traffic congestion.

One-third of respondents have an interest in riding County Connection.

Non-riders were asked to rate the likelihood that they would use County Connection's bus services in the future. Approximately two-thirds of respondents said that it was unlikely or that there was no chance at all that they would use County Connection in the future. However, 7-percent said that they were very likely to use County Connection and another 31-percent indicated that they were somewhat likely to use the service, indicating 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.

Desired Investments and Improvements

Residents desire expanded public transportation investments, above expanded roads, highways and freeways.

Respondents were asked to select the three top priorities for future investments in their community. The top three selections 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, indicating a desire among all groups for expanded public transit in Central Contra Costa County.

BART riders want increased County Connection frequency to help connect them to/from stations faster and reduce transfer time.

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 that County Connection buses are too infrequent (47-percent) and that the bus takes too long (37-percent). This result shows a desire for more frequent service and travel times that are more competitive with private vehicles.

Residents want public transit improvements and investments that result in bus service that runs every 15-minutes; bus stops closer to home or destination; and more on-demand options.

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 responses to the 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 versus retaining customers or encouraging greater use of the system from existing customers.

2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Background
December 15, 2017

1.0 BACKGROUND

Stantec Consulting Services Inc. (Stantec) was retained by the Central Contra Costa Transit Authority (County Connection) to execute quantitative surveys of residents in Central Contra Costa County as part of their Fixed Route Community Survey. Stantec staff, in collaboration, with County Connection staff developed the survey instruments, sampling plans, and promotional materials. The survey was conducted during summer 2017 and received 2,940 responses.

County Connection conducts on-board surveys approximately every three years and has a good understanding of who its riders are and how they use the service. However, a comprehensive community study that includes non-riders had not been conducted in the past 20 years. The community survey was open to all residents and was successful in reaching a different audience than the on-board surveys, with 50-percent of respondents identifying as non-riders and an additional 20-percent identifying as former County Connection riders.

The community survey queried typical travel modes and behavior, previous use of and brand recognition of County Connection, and attitudes towards public transit. Questions were developed to provide County Connection with an understanding of how the agency can best serve residents of the central county, what improvements residents would like to see, and whether these improvements can encourage greater use of the system. The results of this survey can help inform service changes, route restructuring, and other investments made by County Connection.

2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Methodology
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2.0 METHODOLOGY

The community survey was conducted primarily online utilizing SurveyMonkey. The survey was conducted in two phases. In Phase 1, residents were mailed postcard invitations asking them to complete an online survey. In the Phase 2, the online survey was widely distributed to the community through various online platforms.

2.1 PHASE 1 – POSTCARD DISTRIBUTION

The first phase of the community survey utilized an address-based sampling approach to distribute the survey link. Resident addresses were sampled randomly and a select number of households were mailed a postcard invitation asking them to take the survey online. The intent of the address-based sampling approach was to provide a representative sample of residents within the County Connection service area and reduce potential sampling bias by randomly selecting households evenly across the County Connection service area.

The address sampling methodology targeted home and apartment addresses within the County Connection service area. PO Boxes were excluded due to potential duplication with residential addresses and to avoid PO Boxes that are used for business purposes. The address list database utilized by the mailing vendor for this project indicated that there are 204,435 residential addresses in the County Connection service area. The County Connection service area is defined as addresses with mailing addresses in Alamo, Clayton, Concord, Danville, Lafayette, Moraga, Orinda, Pleasant Hill, San Ramon, and Walnut Creek. Unincorporated areas of the County typically assume the name of the nearest city for mailing address purposes and are, therefore, represented in these figures.

A proportional approach was used in distributing the postcard invitations. Each city and zip code was sampled evenly. Therefore, the total number of postcard invitations mailed in each city and zip code, correlated with their total number of residential addresses. Table 1, below, shows postcard invitation distribution by city.

Approximately 14,600 postcards were mailed as part of Phase 1. This represents approximately a 7-percent sample rate of residential addresses. 1 in 14 households were invited to participate in the survey via the Phase 1 invitation postcard.

Residents without access to the Internet were provided a phone number on the postcard to request a paper copy of the survey. A dedicated voicemail line was set up at the provided phone number which instructed respondents to leave their name and address, in order to receive a paper copy of the survey by mail. The voicemail instructions were recorded in English and Spanish. Thirteen requests for a paper copy of the survey were received. Eight of these surveys were completed and returned using the included postage-paid envelope. Returned surveys were input into SurveyMonkey by Stantec staff.

Phase 1 of the survey was conducted from July 15 to August 1, 2017. Approximately 200 surveys were completed as part of this phase.

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City	Total Residences	Est. Sample Size
Alamo	5,426	388
Clayton	4,499	321
Concord	46,731	3,338
Danville	20,575	1,470
Lafayette	10,776	770
Martinez	19,522	1,394
Moraga	5,816	415
Orinda	6,923	495
Pleasant Hill	14,308	1,022
San Ramon	27,968	1,998
Walnut Creek	41,891	2,992
Service Area Total	204,435	14,603

Table 1. Phase 1 Postcard Sampling by City

2.2 PHASE 2 – ONLINE DISTRIBUTION

In Phase 2, the online survey was widely distributed to the community through various online platforms. The survey was shared on County Connection’s social media platforms including Facebook, Twitter, and Nextdoor. Municipal partners were asked to share the survey on their website, newsletters, and social media pages. The survey was also shared by 511 Contra Costa via their website, Facebook and Twitter pages, employer eNewsletter, and SchoolPool program letters.

Phase 2 of the survey was conducted from August 2 to September 12, 2017. Approximately 2,740 surveys were received as part of this phase.

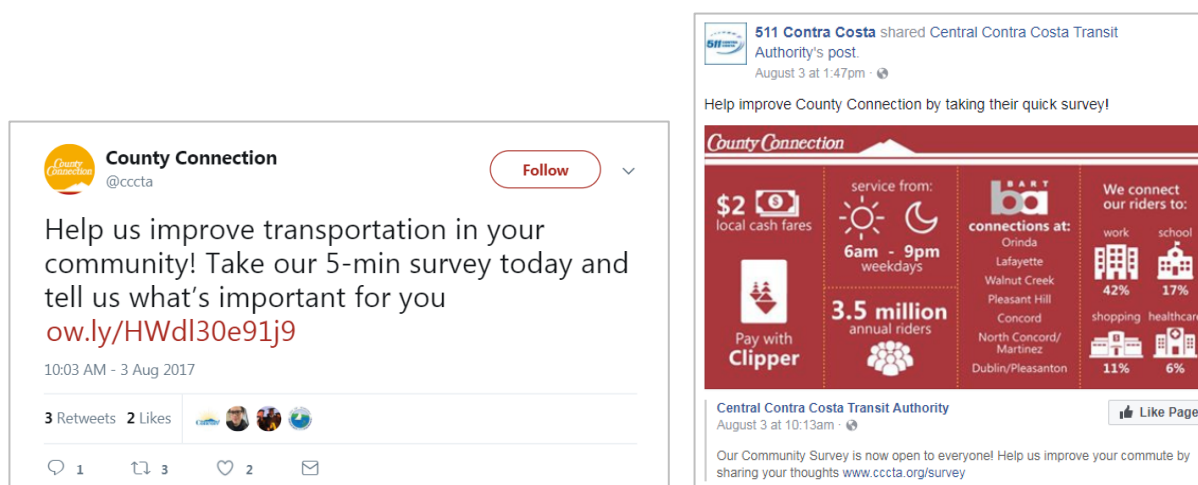


Figure 1. Sample Social Media Posts by County Connection and 511 Contra Costa

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2.3 SURVEY INSTRUMENT

The rider survey was developed through an iterative process with feedback from County Connection, and following approval, was translated into conversational Spanish. The survey was pre-tested by Stantec staff. A total of 29 questions were developed (including an open-ended suggestions/comments question) which queried a number of topics including current travel habits, brand awareness, opinions of public transit, desired improvements, and demographics. The complete survey can be found in Appendix A.

The online survey instrument utilized skip logic throughout to guide respondents to various sets of questions based on their response to an earlier question. This was used to skip respondents over questions regarding a topic they were not familiar with. It was also used to direct respondents to particular sets of questions intended for specific user groups (current riders, former riders, and non-riders).

2.4 ANALYSIS

Microsoft Excel was used to generate summary statistics for each survey question, creating graphs and tables showing the distribution of responses. Where appropriate, cross tabulations and correlation matrices were generated to explore potential correlations between questions. Segmentation techniques were used to isolate user groups based on their survey responses. NVivo, a qualitative data analysis computer software package, was used to code open-ended responses received in the final question of the survey.

3.0 ANALYSIS AND FINDINGS

The Fixed Route Community Survey was created to capture the travel habits and perspectives of all residents within the County Connection service area. 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 was the product of the online survey, where 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.

3.1 DEMOGRAPHIC PROFILE OF ALL RESPONDENTS

Most respondents were age 35 and over, with strong participation from seniors age 64 and over. Most respondents were female and the average income reported was \$100,000 or more. There was some overrepresentation from Danville and Moraga, with underrepresentation from Concord and Martinez. 85-percent of non-riders reported driving as their primary mode of travel.

The demographics of survey respondents generally match the demographics of the County Connection service area, with some key exceptions. Demographics of the County Connection service area are shown in Table 3. Those aged 18 to 34 were underrepresented in the survey, while those aged over 64 were overrepresented. Adults aged 35 to 64 were represented within proportion. The survey overrepresented females, with 1.5 times as many responses completed by females as compared to males, despite the County Connection service area being evenly split between males and females.

Race was generally proportionally represented in the survey responses. 65-percent of respondents identified as White, compared to 62-percent of County Connection's service area population. The largest minority group represented in the survey were those of Asian descent, with 13-percent of respondents identifying as Asian, compared to 16-percent of County Connection's service area population.

The Census Bureau collects data on Hispanic or Latino origin as a question separate from race. However, for the purposes of designing a concise survey, race and ethnicity were combined into a single question in this survey. Therefore, it is difficult to draw firm conclusions regarding Hispanic or Latino participation in the survey, due to the survey design. Individuals who are of Hispanic or Latino origin may have more strongly identified with the other race categories listed.

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VARIABLE		% of respondents n=2,553
Age	Under 18	1%
	18-24	2%
	25-34	7%
	35-44	17%
	45-54	22%
	55-64	21%
	Over 64	30%
Gender	Female	58%
	Male	37%
	Prefer not to say	4%
	Prefer to self-describe	1%
Race	White	65%
	African American or Black	1%
	Asian	13%
	American Indian or Alaskan Native	0%
	Native Hawaiian or other Pacific Islander	0%
	Hispanic/Latino	4%
	Other	3%
	Prefer not to say	13%
Income	Less than \$15,000	2%
	\$15,000 to \$34,999	4%
	\$35,000 to \$74,999	9%
	\$75,000 to \$99,999	10%
	\$100,000 or more	44%
	Don't know / Prefer not to say	32%

Table 2. Demographics of Survey Respondents

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VARIABLE		% of residents
Age	18-24	10%
	25-34	14%
	35-44	18%
	45-54	20%
	55-64	17%
	Over 64	21%
Gender	Female	49%
	Male	51%
Race	White	62%
	African American or Black	2%
	Asian	16%
	American Indian or Alaskan Native	0%
	Native Hawaiian or other Pacific Islander	0%
	Hispanic/Latino	15%*
	Other	8%
Income	Less than \$15,000	6%
	\$15,000 to \$34,999	14%
	\$35,000 to \$74,999	22%
	\$75,000 to \$99,999	12%
	\$100,000 or more	49%

Table 3. Demographics of County Connection Service Area

Source: 2011-2015 American Community Survey 5-year estimates

The demographic profile of respondents from Phase 1 (postcard) and Phase 2 (online) was relatively similar. The age breakdown of respondents in the two phases was identical, while race and income saw a modest change in Phase 2. There was a 6-percent increase of White respondents and high-income respondents (\$100,000 or more) in Phase 2. The biggest difference between in the demographics is seen in gender. Phase 1 achieved a nearly even split between females and males, while in Phase 2, 60-percent of respondents were females.

The survey received completed surveys from each jurisdiction in County Connection’s service area. The number of completed surveys was proportional to the number of households in most cities with some minor exceptions. Concord and Martinez were underrepresented in the survey results, while Danville and Moraga were overrepresented. The breakdown of completed surveys by city, compared to the share of households per city is shown in Table 4.

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City	Survey Distribution (n=2,586)	Household Distribution (n=204,435)
Alamo	2%	3%
Clayton	2%	2%
Concord	15%	23%
Danville	17%	10%
Lafayette	8%	5%
Martinez	5%	10%
Moraga	7%	3%
Orinda	5%	3%
Pleasant Hill	7%	7%
San Ramon	14%	14%
Walnut Creek	18%	20%

Table 4. Survey Distribution by City

3.2 USE OF PUBLIC TRANSIT

Question: In the past 30 days, how many days did you ride on the services of Amtrak, AC Transit, BART, County Connection, Tri Delta Transit, Wheels, or Westcat?

Two-thirds of respondents indicated that they had used public transit in the last 30 days. Among the survey respondents, 22-percent were classified as “frequent” users, meaning they rode public transit more than 10 days in a month. Nearly half of respondents (45-percent) were classified as “occasional” users, indicating they rode transit between one and ten days in a month. The remaining third of respondents indicated they did not use public transit at all.

This range in use of public transit provides County Connection with a diverse array of options that reflect different user groups within the general public. With two-thirds of respondents using transit either regularly or occasionally, survey participants have a good familiarity with local and regional public transit options available to them, knowledge of issues that public transit users face, and where improvements can be made. Likewise, the opinions of those who do not use public transit are valuable in a survey intended to gauge public opinion and attitudes towards public transit.

While this question did not allow respondents who use public transit to indicate which service they ride, subsequent questions provide insight into the percentage of respondents who ride BART and/or County Connection, the two prominent public transit operators in Central Contra Costa County. Virtually all respondents who indicated having used public transit either rode on BART or County Connection. Less than 1-percent indicated riding on other regional transit agencies, including Amtrak, AC Transit, ACE, Muni, SamTrans, or VTA.

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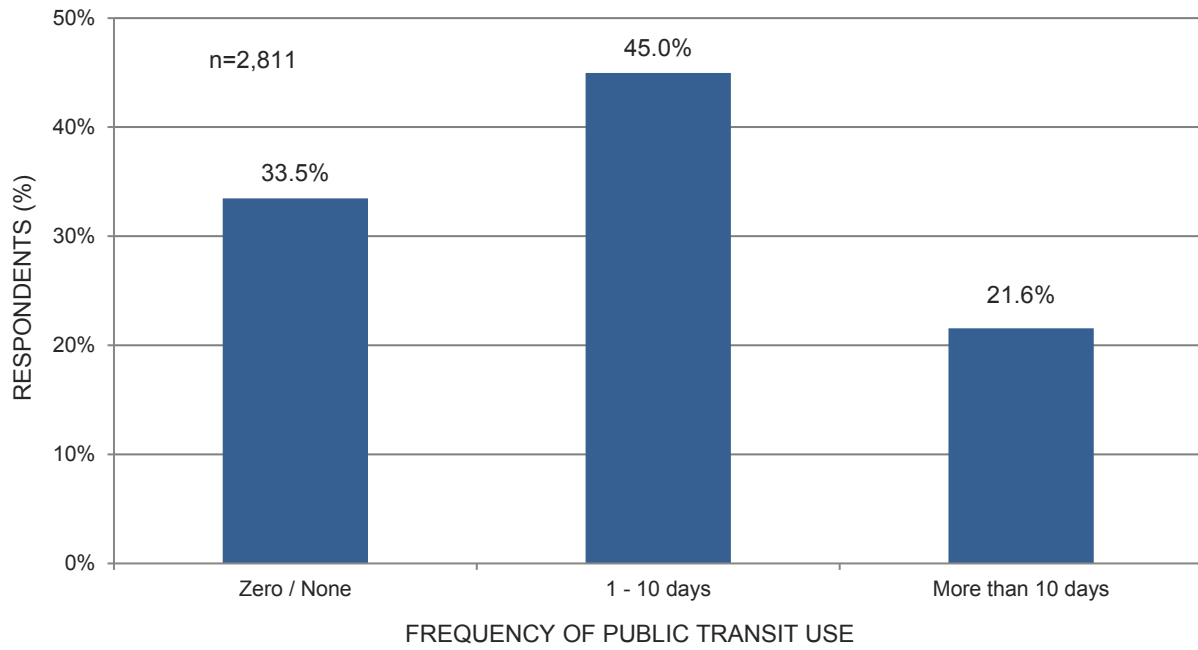


Figure 2: Frequency of Public Transit Use

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Question: Do you currently ride BART?

BART was the most commonly utilized public transit agency among respondents and is used by the majority of respondents. Only 23-percent of respondents indicating they do not ride BART.

There are varying degrees as to how often or frequently respondents ride BART, with nearly half (48-percent) indicating that they only ride a few times a month or less. This shows that most of the BART riders captured in this survey are familiar with the system and destinations it serves. As occasional riders, they are likely riding BART in the off-peak to reach key destinations in Oakland and San Francisco, sporting events, and the airport. Approximately 13-percent of respondents ride BART five days a week or more, while 7-percent indicated riding three to four days a week, and the remaining 10-percent riding one or two days a week.

Cross-tabulation between County Connection riders and BART riders shows that County Connection customers are twice as likely to use BART regularly (once a week or more). When County Connection riders are excluded from the results, the percentage of respondents riding BART regularly drops from 29-percent to 20-percent. This shows that County Connection riders are using local bus services to access BART. It demonstrates the value that local bus services have in providing first and last mile connections from BART to homes and employment centers. This same relationship between County Connection riders and BART riders is revealed again in the following question.

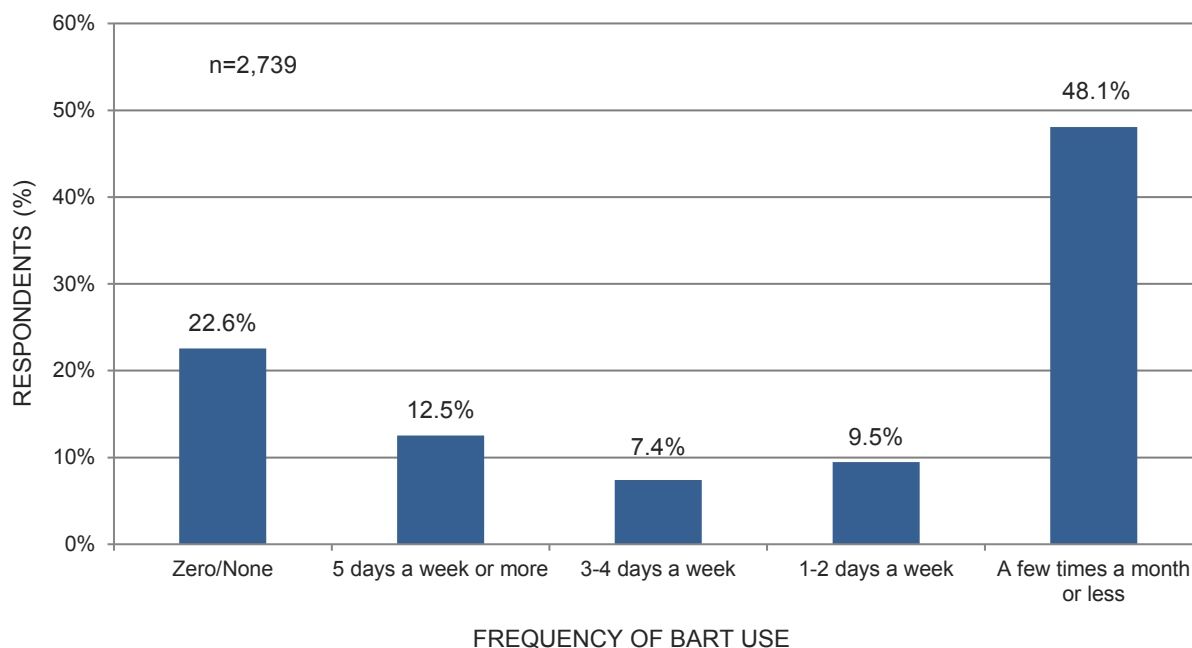


Figure 3: Frequency of BART Use

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Question: Which of the following best describes you?

This question aimed to group respondents into four different classes (1) current County Connection fixed-route riders; (2) current County Connection LINK riders; (3) former County Connection riders; and (4) non-riders. This question was used in combination with survey logic to direct participants to different sets of questions intended for each user group.

Over one-quarter of respondents identified as current County Connection fixed-route riders, indicating that they ride County Connection regularly or occasionally. Additionally, a small percentage of respondents identified as LINK paratransit riders. The percentage of County Connection riders represented in the survey results was higher than the proportion of Central County residents who ride County Connection. The high participation is a product of the online survey, where 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 with the agency and a vested interest in the outcomes of the survey.

Former County Connection riders made up 21-percent of survey responses. Half of respondents indicated they had never ridden or rarely ride County Connection. Therefore, the survey was successful in reaching a range of community members, including groups that would not be reached via traditional on-board survey methods.

Again, this question revealed a positive correlation between County Connection riders and BART riders. Of those who do not ride BART, the percentage of respondents having never ridden or rarely riding County Connection rises from 50-percent to 65-percent. For those who ride BART five days a week, 50-percent indicated that they ride County Connection regularly. Of those who ride BART three to four days a week, 40-percent ride County Connection regularly.

A correlation was also found between County Connection and household income. Those with household annual incomes under \$35,000 were nearly twice as likely to identify as current County Connection riders, compared to households earning over \$100,000 annually.

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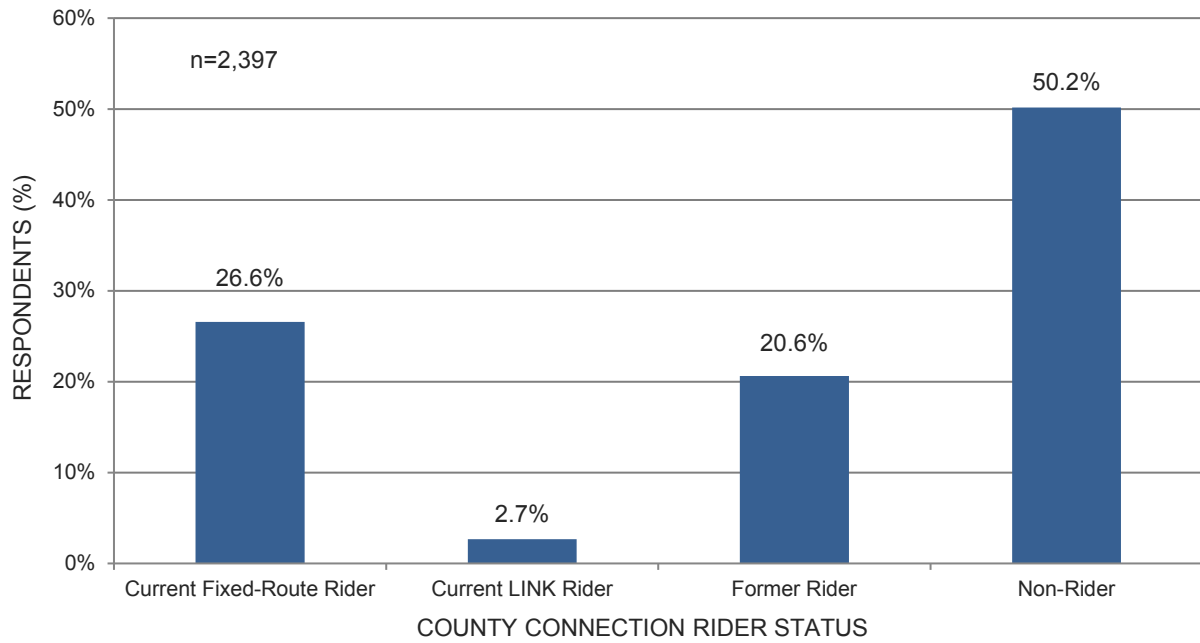


Figure 4: County Connection Rider Status

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Question: How often do you ride County Connection?

Current riders were asked how often they ride County Connection. Half of current riders (51-percent) identified as occasional riders, who ride a few times a month or less. The remaining half of current riders were evenly split between riding five days a week or more, three to four days a week, and one to two days a week.

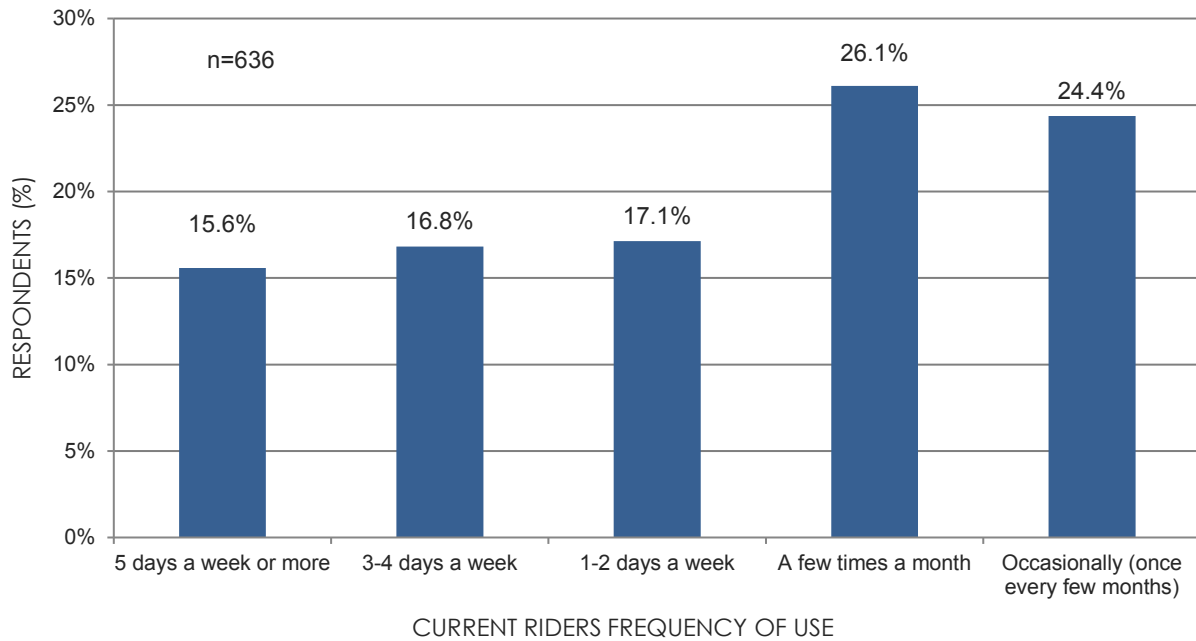


Figure 5: County Connection Current Riders Frequency of Use

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Question: Over the last three years, would you say County Connection service has...

Current riders were also asked about their perception of County Connection service over the last three years. 50-percent believe County Connection has stayed the same. 18-percent believe that service has improved, while 10-percent believe it has gotten worse.

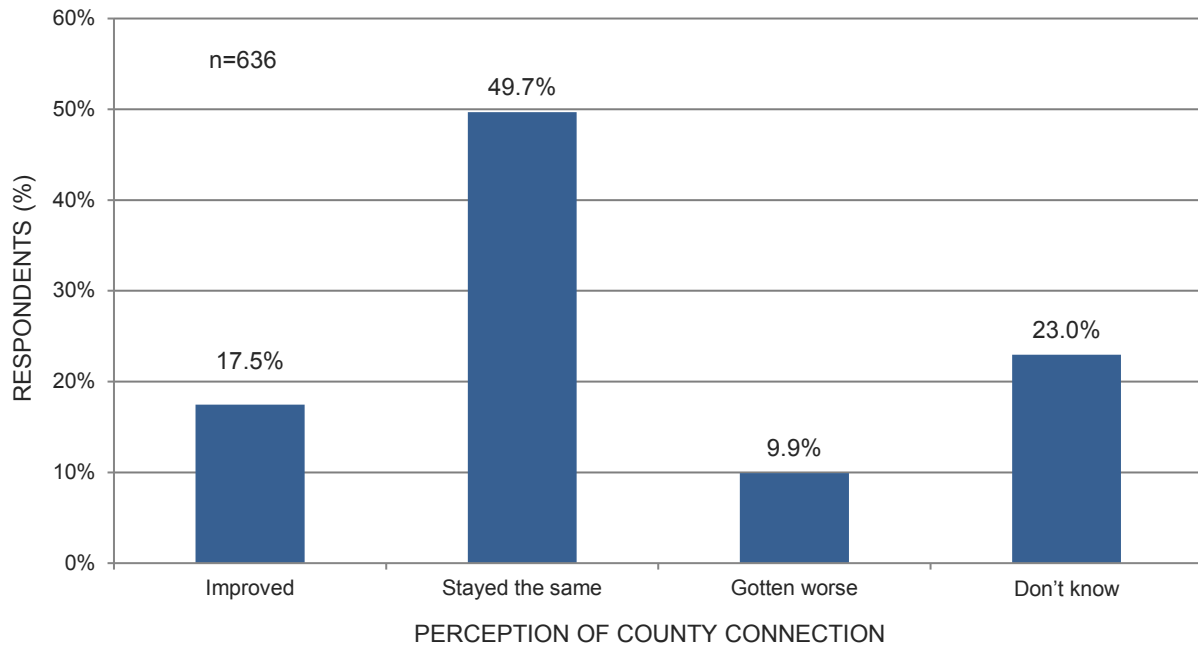


Figure 6: Current Riders' Perception of County Connection

3.3 PERCEPTIONS AND KNOWLEDGE OF PUBLIC TRANSIT

Question: What is your familiarity with BART, ridesharing, and County Connection?

Respondents were asked to state their familiarity with BART, ridesharing (transportation network companies [TNCs], including Uber and Lyft), and County Connection. The purpose of this question was to gauge residents' brand recognition of different mobility providers, both public and private, that operate in Central Contra Costa County.

Of the three mobility providers, respondents were most familiar with BART. 85-percent indicated they had high familiarity with BART, which means they know how to ride and know of multiple stations or destinations. Another 15-percent stated they had some familiarity, indicating that they have heard of BART and likely know of the closest station and one destination. Fewer than half a percent indicated that they had no knowledge of BART.

The high degree of familiarity that residents have with BART demonstrates its importance in the regional transportation system. This also shows BART's prominence as a public transit provider for Central Contra Costa County. As previously discussed, 77-percent of respondents indicated they ride BART at least occasionally, if not more frequently. Other respondents may no longer ride BART, but are likely to have used it in the past. Familiarity with BART was consistent among demographic groups and user types. Nearly all existing riders stated that they had "high familiarity" with the system.

Ridesharing had the second highest brand recognition of the three mobility providers. 53-percent of respondents had high familiarity with ridesharing, indicating that they are aware of the companies and the services they provide, and have used and requested rides in the past. Another 42-percent of respondents stated they have some familiarity with ridesharing, but have never used the services. Under 5-percent of respondents reported having no knowledge of ridesharing or the main TNC providers (Uber or Lyft).

Brand recognition of ridesharing was consistent among demographic groups. The cross-tabulations revealed a positive correlation between BART riders and ridesharing. Frequent BART riders were much more likely to indicate high familiarity with ridesharing. Among frequent BART riders, high familiarity of ridesharing was 70-percent. For non-BART riders, high-familiarity dropped to 40-percent. This suggests that current transit riders are more familiar with and more likely to have used other transportation alternatives that are available. Although this was not explored in detail through the survey questionnaire, it is possible that many BART riders rely on rideshare at least occasionally for first or last-mile journeys.

County Connection had the lowest brand recognition of the three mobility providers. 39-percent of respondents indicated they had high familiarity with County Connection, meaning they know of one or more bus routes and how to ride. 51-percent have some familiarity of County Connection, meaning they are aware of the brand name and have seen buses on the road or at BART stations. 9-percent indicated they had no knowledge of County Connection, which was twice as high as it was for ridesharing.

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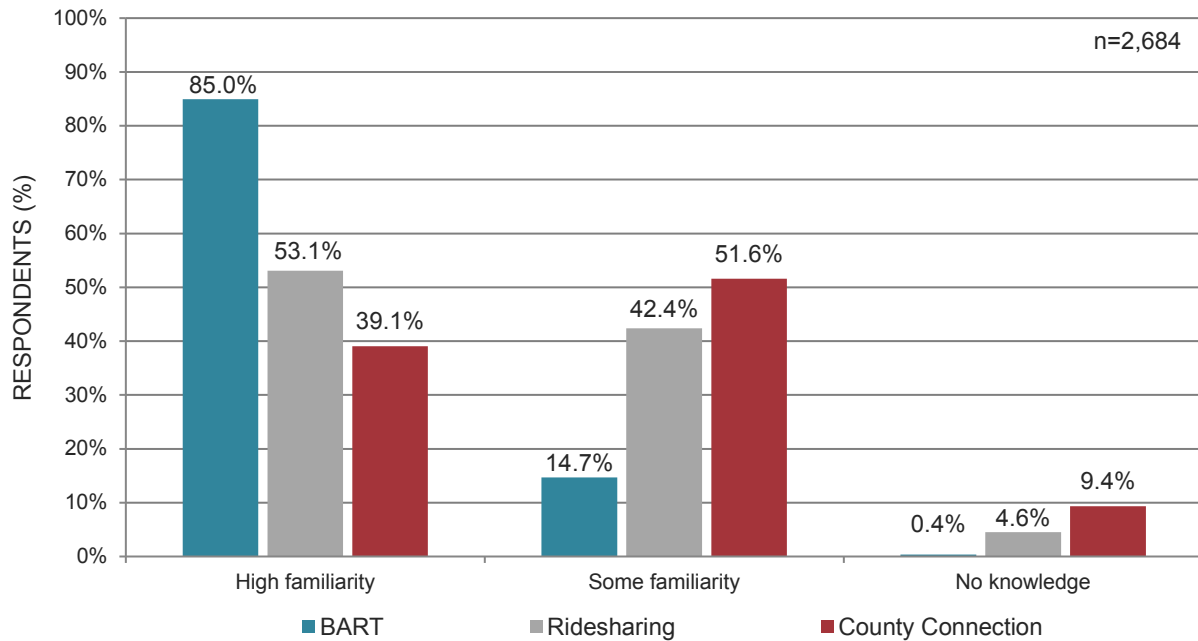


Figure 7: Brand Recognition by Mobility Provider

Question: How would you rate the value of BART, ridesharing, and County Connection?

Respondents were asked to rate their perceived value of BART, ridesharing, and County Connection in four areas. Respondents rated each mobility provider in terms of (1) its value for money, (2) its value to the community, (3) its value for reducing traffic congestion, and (4) its value for providing alternate options to driving oneself. Respondents were able to rate each on a scale of 1 to 5, with 5 being the highest.

Value for Money

Ridesharing and County Connection were highly ranked in terms of value for money (4.3 and 4.4, respectively), while BART was ranked significantly lower (3.6). Interestingly, non-riders ranked County Connection's value for money higher than any other group (4.6), despite a lower level of familiarity with the services County Connection provides. This shows that residents, even though they may not rely on County Connection, value the services it provides to the community.

Non-riders also ranked ridesharing higher than average (4.5), indicating that many of these individuals may live in areas without local bus service, where ridesharing is a seemingly affordable option compared to taxis or car ownership. Frequent BART riders rated ridesharing's value for money the lowest (3.9). As discussed above, this group had the highest familiarity with TNCs, suggesting that many of these respondents have used TNCs and are aware of the costs when used regularly.

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Value to the Community

Value to the community was relatively consistent across all three mobility providers. BART was ranked highest in terms of value to the community (4.5), followed closely by County Connection (4.4), and ridesharing (4.2). These rankings were consistent among all user groups and demographics.

Value for reducing traffic congestion

BART was ranked the highest (4.5) in terms of its value for reducing traffic congestion. Respondents likely recognize that BART offers high capacity transit service that helps reduce demand on many of the region's congested freeways and serves key employment centers and destinations. County Connection was ranked second (4.2), with respondents recognizing that buses are able to remove a number of cars off local freeways and congested arterials. Ridesharing received the lowest score (3.4). This shows that respondents recognize that TNCs may actually increase vehicle miles traveled (VMT) and that in many cases they may only travel with one passenger, having the same effect as a single-occupant vehicle.

Value for providing alternate options to driving

Ridesharing and BART were closely ranked in terms of their value in providing alternate options to driving (4.2 and 4.1, respectively). County Connection was ranked lowest (3.8), likely due to gaps in service coverage across many areas of the county, limited service hours, and infrequent headways, which were identified by respondents in subsequent survey questions. Overall BART ranked highly in terms of providing alternate options to driving (4.1). However, those who do not currently ride BART ranked it much lower (3.5). This is likely because these individuals have trips or commute patterns that cannot be served by BART.

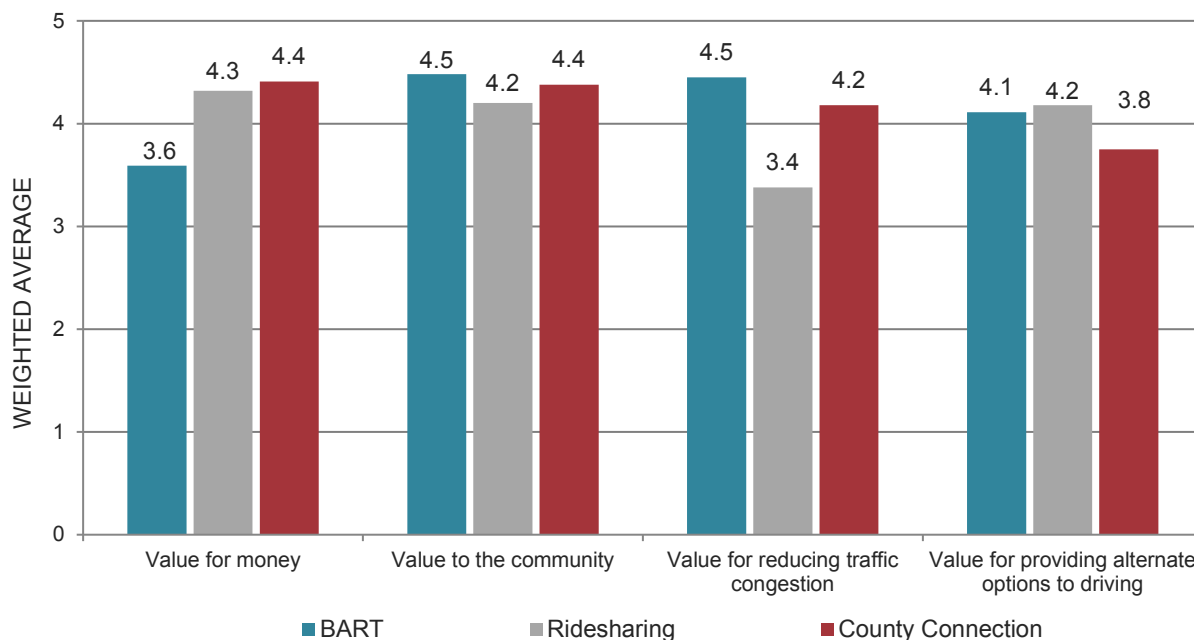


Figure 8: Ranking of Impacts by Mobility Provider

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Question: How did you hear about County Connection?

All respondents were asked how they heard about County Connection. This question was intended to gauge brand awareness and understand how County Connection is visible in the community, particularly to non-riders. Respondents were able to select all options that applied.

Among all respondents, seeing buses on the road was the most prominent way people learn about County Connection, with 65-percent of respondents indicating so. Seeing buses or signage at BART stations was the second most common response at 42-percent. This shows the value County Connection's physical assets play in promoting the brand and the services it provides. This is especially true when the responses of non-riders are examined.

81-percent of non-riders say they have seen buses on the road and 48-percent say they have seen buses or signage at BART. Additionally, approximately 19-percent of non-riders indicated that a family member or friend uses County Connection, showing that current riders could offer County Connection a valuable marketing tool for engaging with and educating non-riders.

Respondents who selected "other" were asked to specify how they heard about County Connection. Respondents provided a range of responses, but common responses included County Connection bus stop signs, Nextdoor website community boards, employer commute programs (including Bishop Ranch), and Clipper Card website or materials.

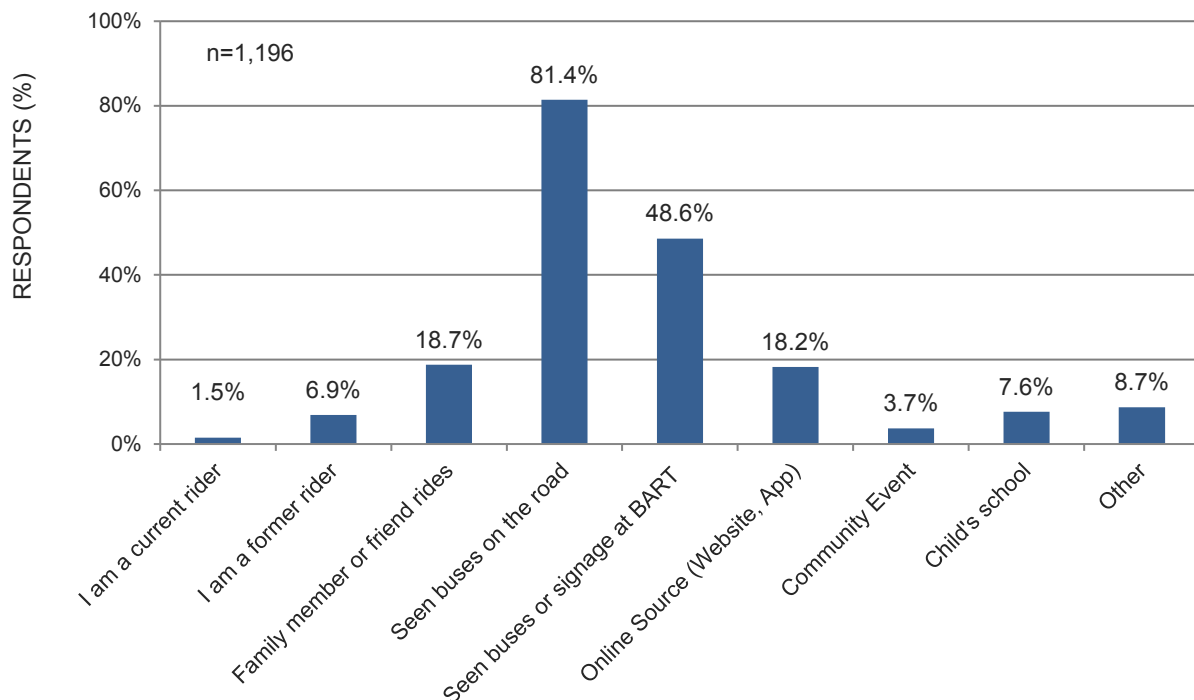


Figure 9: Ways Non-Riders Learn About County Connection

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Question: Do you know where the County Connection bus stop closest to your home is?

All respondents were asked if they know the location of the County Connection bus stop closest to their home. This question was asked to understand how familiar people are with County Connection in their own community or neighborhood. Three-fourths of respondents indicated they know where their closest bus stop is. Unsurprisingly, nearly all current riders responded yes to the question. For non-riders, 60-percent indicated they know where their closest bus stop, showing that a majority of people are somewhat familiar with County Connection's routes or service coverage.

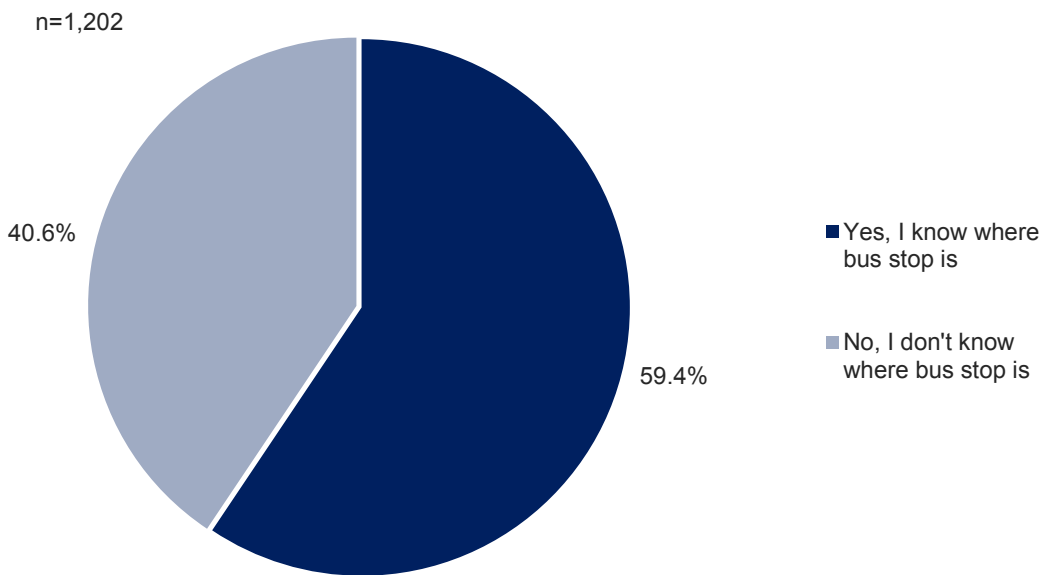


Figure 10: Non-Rider Knowledge of Bus Stop Location Closest to Home

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Question: Why do you no longer use County Connection?

Former riders were asked to give the reason they do not ride County Connection anymore. Respondents were permitted to select all applicable responses. Infrequent bus service was the top reason selected, with nearly half indicating this as a reason they stopped using County Connection (49-percent). This was followed by a change of jobs or work location (23-percent). Transfers both from BART to buses or between buses were both cited as reasons for discontinuing County Connection service use because they take too long or are inconvenient. This indicates a direct relation to County Connection's limited service frequencies and schedules on many routes, which results in significant transfer penalties if transfers are missed. Purchasing a car and getting rides from family or friends were also among the top cited reasons for ceasing to ride County Connection.

Former riders who selected "other" were asked to specify the reason they stopped riding County Connection. Many of the same reasons presented in the multiple-choice selections were reiterated in the comments, including low frequencies, inconvenient schedules, and lengthy travel time. Other reasons cited were service changes that removed service from neighborhoods, lack of stops within walking distance of origin or destination, and the need to use a car for errands or children.

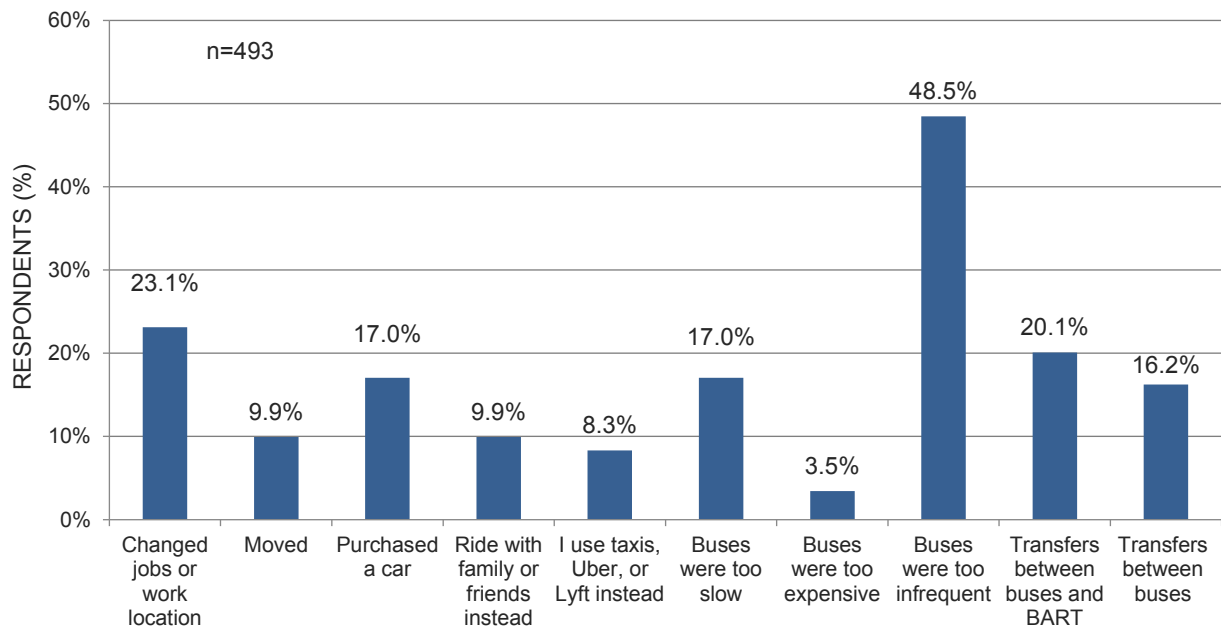


Figure 11: Why Former Riders No Longer Use County Connection

3.4 NON-RIDER TRENDS AND PERCEPTIONS

Question: For the trips you make on a daily basis, do you...

An overwhelming majority (84-percent) of non-rider respondents indicated they drive to complete their daily trips. Driving includes travel by car, motorcycle, carpool, TNCs, or taxi. Of those who take public transit, but do not ride County Connection (7-percent), nearly all referenced BART as the transit service they ride. The breakdown of travel mode among non-riders is consistent with the commuting characteristics reported in the 2015 American Community Survey 5-year estimates.

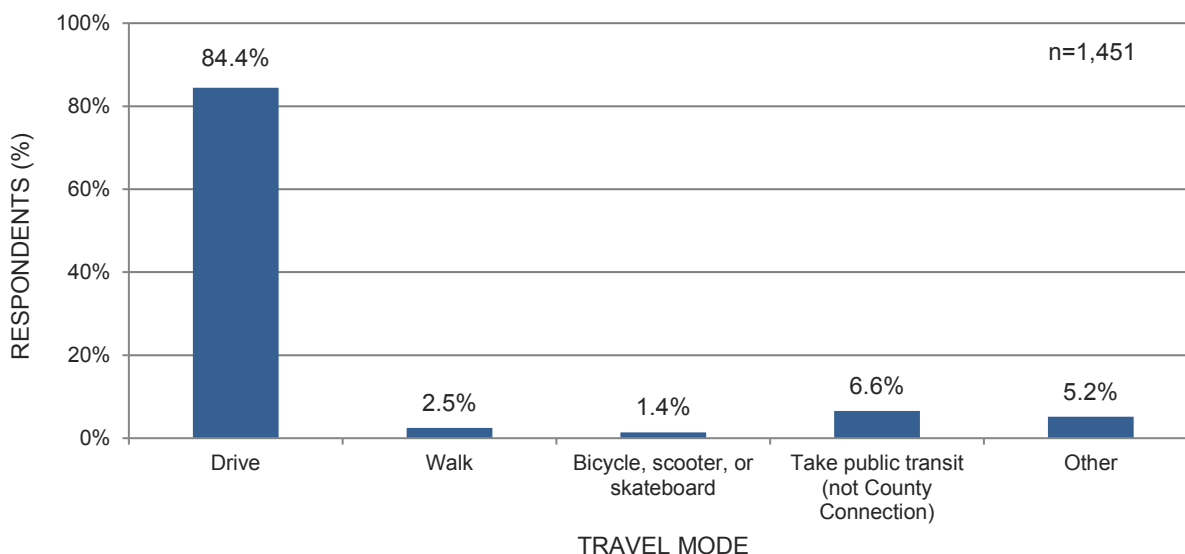


Figure 12: Daily Primary Travel Mode for Non-Riders

Question: Do you agree or disagree with the following statements regarding County Connection service?

Non-riders were asked a series of questions to understand their familiarity with the County Connection system. Approximately half of respondents indicated they have knowledge of County Connection’s services and know how to ride. This demonstrates that while County Connection might have high brand awareness, there is an opportunity to engage with non-riders for them to learn more about County Connection and the services it provides.

53-percent of non-riders responded that they have County Connection service in their area, while 19-percent do not have service in their area. Over a quarter of non-riders indicated not knowing whether or not County Connection serves their area. Just under half of non-riders know how to ride County Connection or pay fares (44-percent). A larger majority (58-percent) indicated knowing where to find information on County Connection’s routes or schedules, although respondents were not asked to specify what source they might consult for route or schedule information.

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Nearly half of respondents agreed that a journey by public transit would require multiple transfers. 41-percent did not know if their journey would require multiple transfers. Only 11-percent indicated that they could complete their journey with a one-seat ride. This shows the importance that transfers play in the Central Contra Costa County public transit network, where given the vast variety of origins and destination pair, it is not possible to serve each by a one-seat ride. This relates to many of the top reasons former riders provided for no longer using County Connection – infrequent services and transfers that take too long.

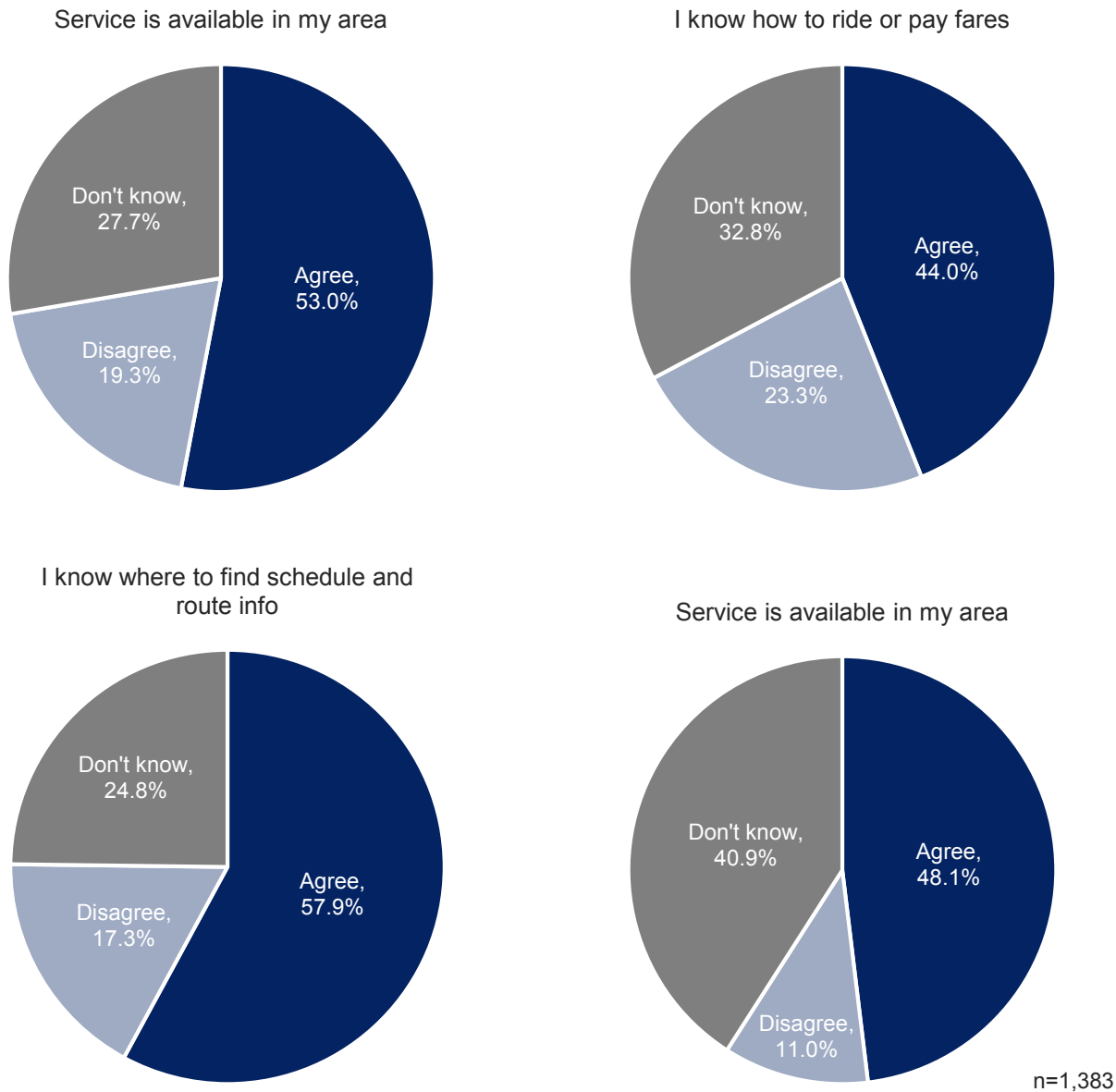


Figure 13: Non-Rider Familiarity with County Connection

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Question: Why do you choose not to use County Connection to get to BART?

Non-riders who indicated they ride BART were asked why they do not use County Connection to get to their local BART station. Respondents selected from a range of options and were able to select all applicable reasons.

The top three selections are that it is easier to drive to the station than take a bus (48-percent; the bus is too infrequent (37-percent); and the bus takes too long (35-percent). Cross-tabulations of the responses between frequent BART riders and occasional BART riders show some divergence in their top reasons. For frequent BART riders, the top selections are that County Connection's services are too infrequent (47-percent) and that the bus takes too long (37-percent). This result demonstrates that regular BART riders value their time and are weary of the transfer penalties that arise when connecting to an infrequent service which can significantly impact their total commute time.

Occasional BART riders overwhelmingly indicated that driving to the station is easier than taking the bus (54-percent). Many of these occasional BART riders may be riding in the off-peak (evenings and weekends) when BART parking is free and plentiful, whereas regular BART riders who commute every morning are more likely to find driving to a station more challenging due to limited parking.

Respondents who selected "other" were asked to specify the reason they choose not to ride County Connection to get to BART. Other responses provided were that the bus stop is too far from their home, ridesharing (including Uber and Lyft) or carpooling to BART provided more convenient options, and unfamiliarity with County Connection routes and schedules.

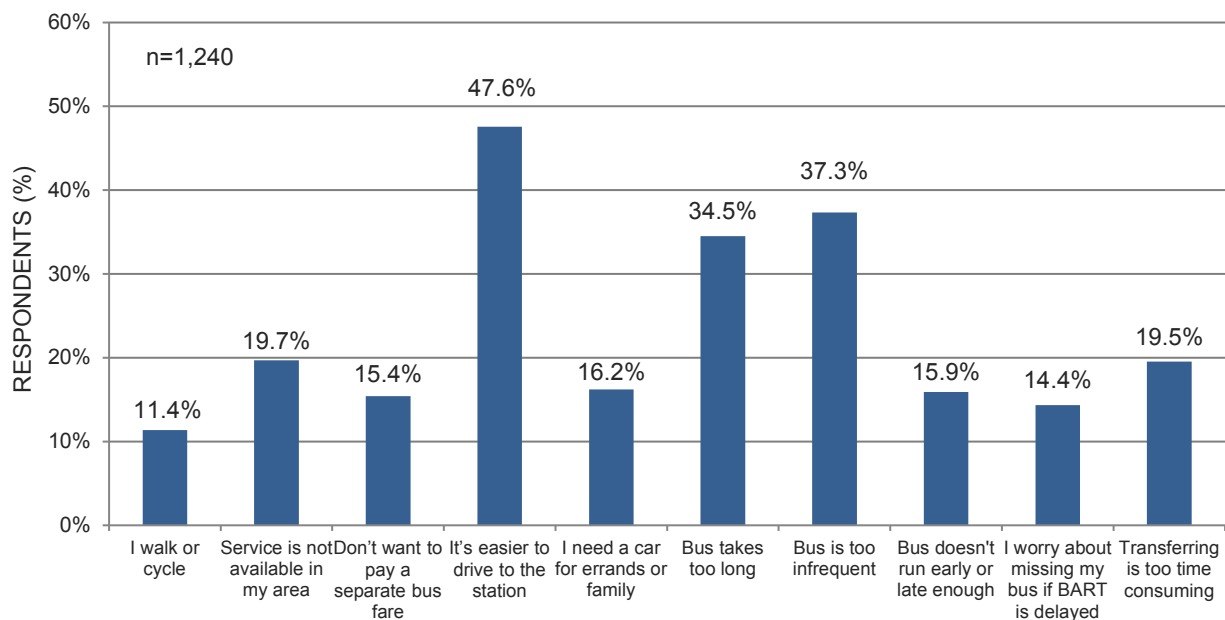


Figure 14: Reasons for Not Riding County Connection to BART

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Question: How likely is it that you will use County Connection's bus services in the future?

Non-riders were asked to estimate the likelihood that they would use County Connection in the future. 52-percent of respondents indicated that it is unlikely that they will ride County Connection in the future, while another 10-percent indicated there is no chance at all that they will ride County Connection. On the flip side, over one-third of respondents indicated a willingness to use or try County Connection in the future. 31-percent said that it somewhat likely and 6-percent indicated it was very likely that they will use County Connection in the future.

This shows that community members have an interest in County Connection and the services it provides. These community members may benefit from additional information about County Connection routes, fares, schedules, and destinations, to overcome some of the knowledge-based barriers to riding identified in earlier questions. Although a small percentage, reaching community members who are “very likely” to use County Connection through targeted information, promotions, or incentives, could be effective in increasing ridership.

Cross-tabulations of responses were conducted to determine if any demographic groups expressed a higher likelihood of trying County Connection. Residents of Lafayette, Moraga, San Ramon, and Danville were twice as likely to select “very likely” than residents of the remaining communities. In total when “very likely” and “somewhat likely” responses were combined, over 40-percent of respondents from Danville and Pleasant Hill indicated a likelihood of riding County Connection. This compares to 25-percent in Orinda and Alamo, the communities with the lowest likelihood.

Age and income demographics were also evaluated. Respondents with annual incomes under \$35,000 were almost twice as likely to indicate that they were “very likely” to ride County Connection, compared to those with annual incomes over \$100,000. Those between 18-34 years old were also nearly twice as likely to select “very likely” compared to those age 54 and over.

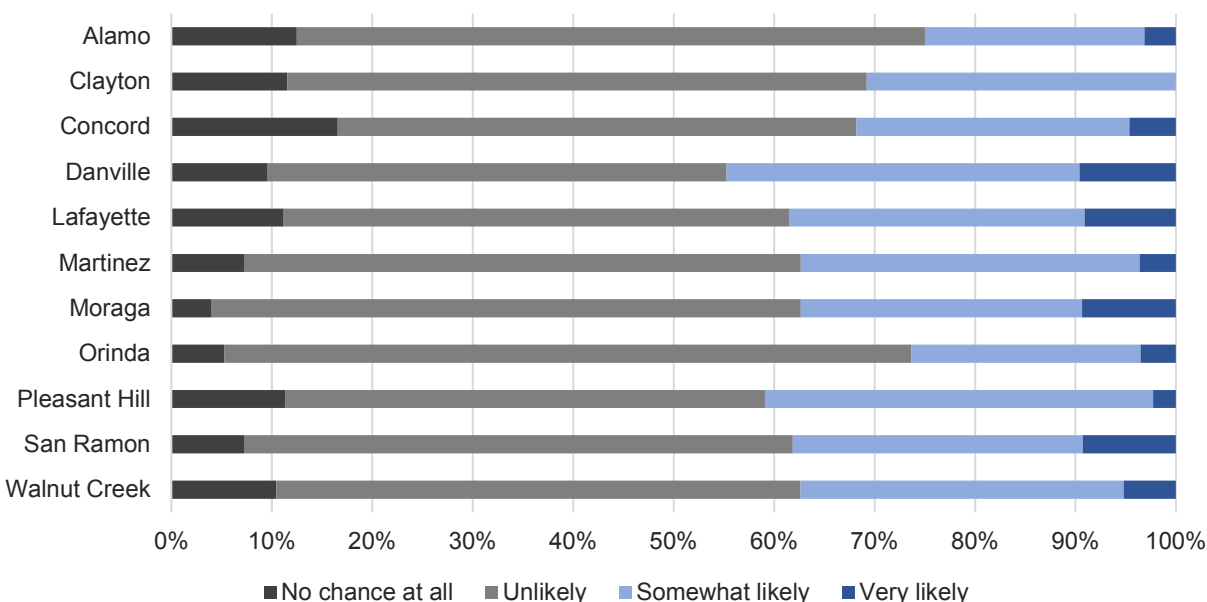


Figure 15: Non-Rider Likelihood of Using County Connection by City

3.5 DESIRED IMPROVEMENTS AND INVESTMENTS

Question: Select the top priorities for future transportation investment:

All survey respondents were asked to select their top three priorities for future transportation investments. Respondents were provided seven options to choose from. The top three choices among all respondents were expanding public transit (80-percent); maintaining and repairing existing roads, highways, and freeways (64-percent); and building more sidewalks, bike lanes, and paths (29-percent).

Responses were consistent among demographic groups and city of residence. Among frequent BART riders, 90-percent selected expanding public transportation as a top priority. For non-BART riders and occasional riders, maintenance and repair of existing roads, highways, and freeways was selected as the top priority.

These responses indicate strong support for investing in transit and improving existing roadway infrastructure across Central Contra Costa County, over expanding roads by building new infrastructure. Residents are also interested in investing in sidewalks, bike lanes, and paths to improve active and multimodal transportation across the county. Investments in carshare, vanpooling, and carpooling also ranked well among respondents as a way to reduce traffic congestion. Residents also expressed interest in developing a passenger transportation service that makes use of self-driving vehicles.

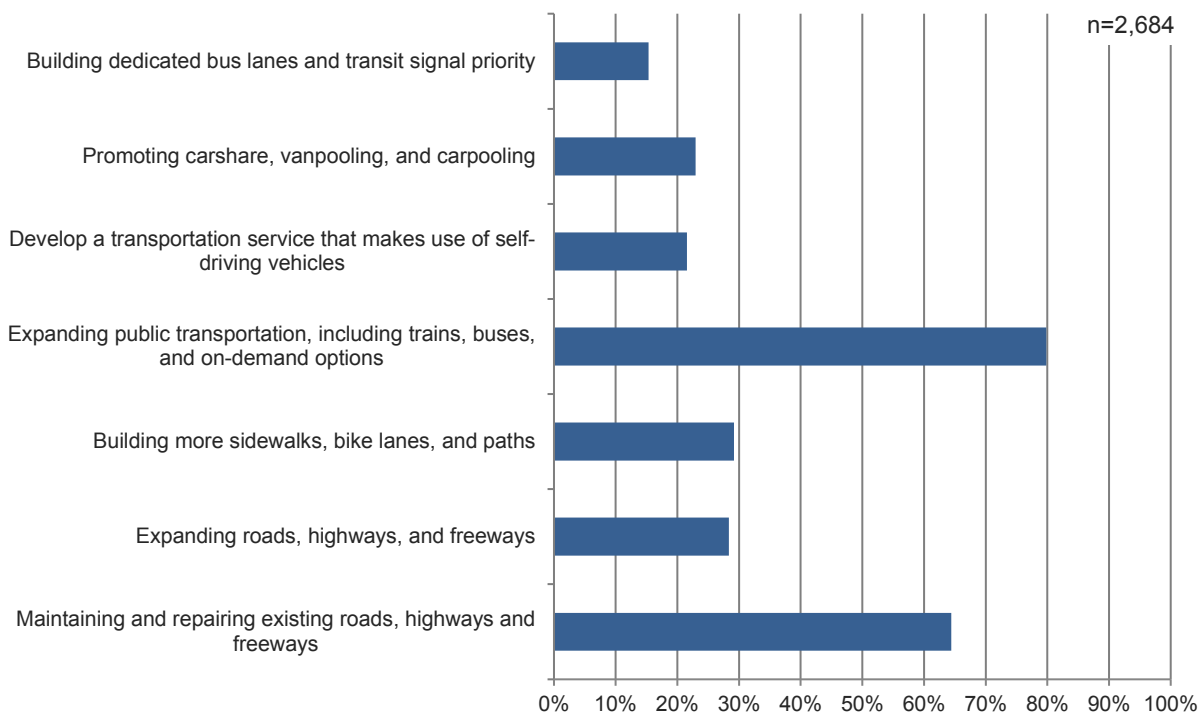


Figure 16: Desired Transportation Investment Priorities

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Question: Select the investment priorities for County Connection that would make you more likely to ride the bus or ride it more often:

To conclude the quantitative portion of the survey, all respondents were asked to select their top three investment priorities for County Connection that would make them more likely to ride the bus (in the case of non-riders) or to ride it more often (in the case of current riders). Respondents were provided ten options to choose from. The top three choices among all respondents were bus service that runs every 15-minutes to connect to/from BART (55-percent); stops closer to one's home or destination (40-percent); and more on-demand options, such as partnerships with Uber or Lyft to provide connections to BART (22-percent).

These investment priorities echo findings from earlier survey questions, regarding why people do not ride County Connection or the challenges they experience when using it. Common themes from previous questions indicated that for many people, bus stops are too far from their origin or destination or there is no service in their area. Limited frequency was also cited as a common problem or concern with the existing County Connection network. This affects those who transfer between services by creating significant transfer penalties, where a missed transfer can delay riders for up to an hour. The limited frequency of most of County Connection's routes also makes it difficult for the bus schedules to fit within one's personal, school, and work schedules.

Top responses were fairly consistent among demographic groups and city of residence, with some noticeable divergences. Among those aged 18-34, buses that run every 15-minutes was selected by two-thirds of respondents (66-percent), while stops closer to one's home or destination dropped proportionally. As the youngest age group, these residents may be more willing to walk further to catch a direct, frequent bus on a major arterial that can offer improved travel times and convenience.

Those with annual incomes under \$35,000 indicated the highest desire for increased weekend service (47-percent) among any other demographic group. These individuals are more likely to be current riders and are aware of the limited service provided by County Connection on weekends. They are also less likely to have access to a personal vehicle and, therefore, more reliant on public transportation.

In San Ramon, Danville, and Alamo more express routes moved into the top three choices selected by residents. This result is likely due to the presence of existing express routes that serve the area during weekday peak periods and the lack of a BART station in these communities. Therefore, an express bus can connect these communities to BART with travel times similar to driving and parking a personal vehicle.

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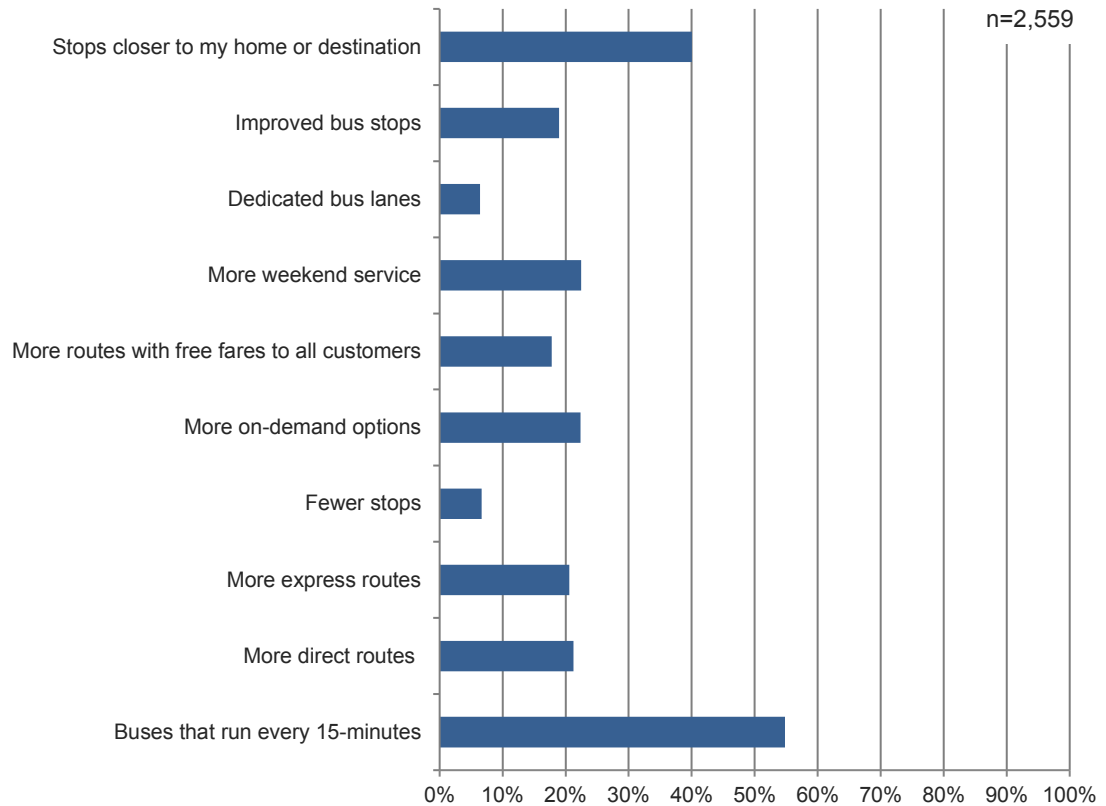


Figure 17: Desired Investment Priorities for County Connection (All Respondents)

For current County Connection riders, the top three priorities were bus service that runs every 15-minutes (74-percent); more weekend service (42-percent); and improved bus stops (25-percent).

For frequent BART riders, the top three priorities were bus service that runs every 15-minutes (74-percent); more weekend service (40-percent); and more on-demand options, such as partnerships with Uber or Lyft to provide connections to BART (23-percent).

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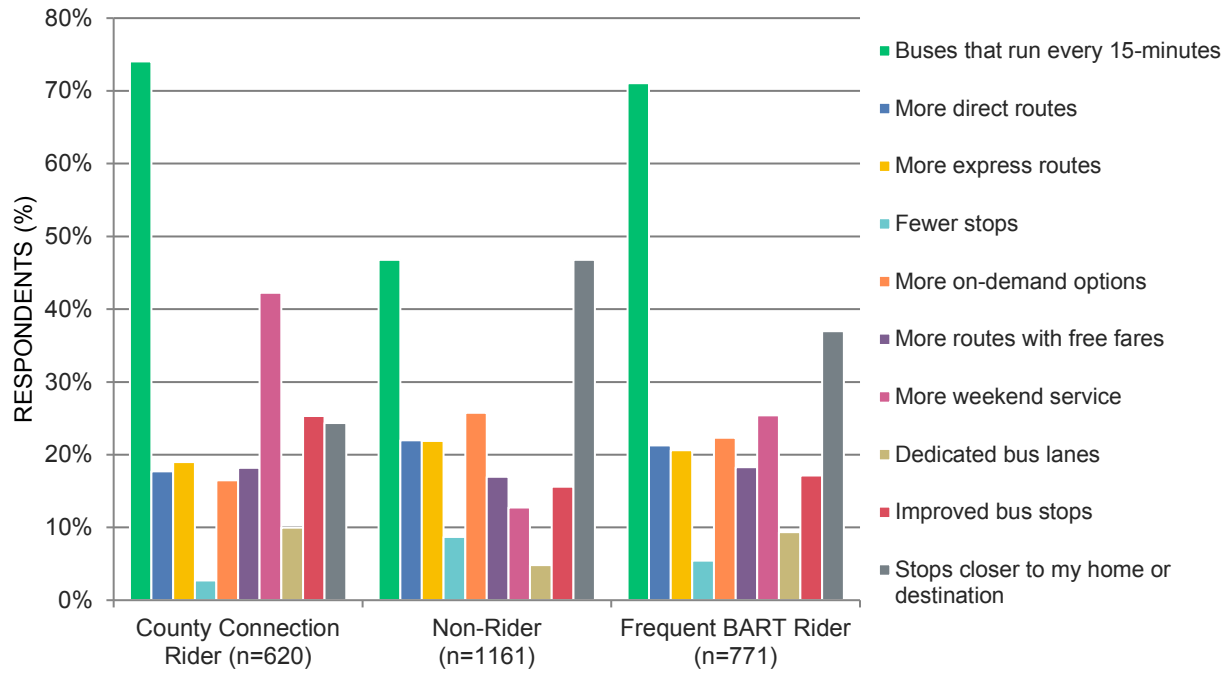


Figure 18: Desired Investment Priorities for County Connection by User Type

3.6 ADDITIONAL RECOMMENDED IMPROVEMENTS AND INVESTMENTS

Question: Are there any other improvements or investment priorities you recommend for County Connection?

All survey respondents were given the option to provide an open-ended response to this final question, to allow them to address issues not raised within the survey. Additionally, it served as an opportunity for respondents to share feedback, commendations, or other suggestions on County Connection's existing services or how services could be improved in the future. Approximately 1,080 comments were received through this question.

Since this question was optional and respondents provided varying degrees of feedback, quantitative analysis of the comments should be avoided because it may not be representative of the sample population as a whole. However, these comments provide useful insight into common topics that the public believe to be important. The volume of comments received for different topics can serve as an indicator of their importance. The comments also reveal the issues and challenges that residents face in utilizing transit or using it more often. Selected comments have been included below to illustrate the types of suggestions that respondents provided, but are not intended to represent the full breadth of issues and specific requests made by respondents.

Comments have been coded into sixteen theme categories. Some themes were divided into sub-categories to record the more specific nature of common requests. Comments were coded to all applicable theme categories. The table on the following page lists all the themes to which comments were coded. It also demonstrates the number of comments received for each theme.

The most common themes reiterate many of the same issues explored in earlier survey questions. Requests for improved service levels, expanded service coverage, and more direct service were the top issues raised in the comments. Other prominent issues discussed in the comments, but not a focus of earlier survey questions, include the need for County Connection to market and promote its services more, enhancing the on-board experience, the use of smaller vehicles to allow County Connection to more efficiently meet passenger demand, and new services to local middle schools and high schools.

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Theme	# of Comments
BART Specific Comments or Concerns	34
Commendations	20
County Connection Marketing and Service Promotion	64
Fares	31
Improved Travel Time	44
Improved Service	344
<i>Frequency</i>	220
<i>Holiday service</i>	4
<i>Hours of operation</i>	88
<i>Weekends</i>	32
Improved Transfers	33
LINK Paratransit and Senior Mobility Concerns	28
More Direct Service	102
<i>Commuter routes</i>	24
<i>Direct local routing</i>	45
<i>Express routes</i>	33
On-Board Experience	85
<i>Cleanliness</i>	13
<i>General</i>	6
<i>Operators</i>	11
<i>Safety</i>	21
<i>Transit App & Bus Tracker</i>	13
<i>Transit signal priority / bus lanes</i>	6
<i>Wi-Fi</i>	15
On-Demand Options	33
Other Comments	46
Schedule Adherence / Reliability	27
School Routes	121
Service Coverage	200
<i>Introduce new route</i>	48
<i>More local neighborhood stops & routing</i>	92
<i>Restore former route or stops</i>	26
<i>Service not available</i>	34
Stop Amenities	54
<i>Benches & shelters</i>	22
<i>General comments</i>	5
<i>Route information (schedules, maps)</i>	7
<i>Lighting</i>	2
<i>Park and ride</i>	18
Vehicles	88
<i>Electric buses</i>	10
<i>General</i>	2
<i>Smaller vehicles</i>	76

Table 5. Open-Ended Response Themes

3.6.2 Top Themes Previously Covered in Survey

Increased Service Levels

Nearly one-third of all the comments received (337) cited a need for increased service levels. In particular, increased frequency was the most desired service improvement, with 220 comments. The current levels of service frequency were repeatedly cited as the biggest barriers residents face in choosing whether or not to take transit.

Respondents noted that current bus frequencies do not align well with school or work schedules, medical appointments times, or other errands. Many respondents said that the current schedules do not allow for an on-time arrival, making it so that they either arrive too early or late. Respondents also note that the current schedules do not allow for much flexibility, in the event of an unexpected change in their work schedule or a BART delay, for example. They also noted the steep transfer penalties that arise, particularly when transferring from BART. If BART trains are delayed on their way home, respondents noted that they can miss the bus and face up to an hour wait for the next bus.

"I would ride more often if the times that the bus arrived and departed from local downtown areas was better suited to an 8-hour work day. Currently I can only take the bus if I go into work late or leave early."

"Last time I checked the bus route that runs through my neighborhood, it only runs once in the am and once in the pm. Not enough times for me to even consider it."

"More frequent routes -- I would love to take County Connection more often but some of the routes I'd like to use run so infrequently that it's impossible for me to do so."

Expanded hours of operation was another highly-requested service improvement and generated 88 comments. Both earlier and later hours of operation were requested. Earlier hours of operation would help those with early start times get to work, while later hours of operation would be beneficial to those who must unexpectedly stay late at work or would like to attend events, dinner, or other social activities after work prior to coming home. Some respondents also noted the need to fill midday gaps in service that some routes experience, in order to serve unexpected trips home from work or to provide greater options to complete local errands and reach medical appointments during the daytime. Increased weekend service levels and service on holidays was also requested, but to a lesser extent.

"I would use bus 17 all the time if it provided service at 5am until 9pm... service stops too early on weekdays."

"The bus service should be till 10:00PM on all the routes, as in my case there is no bus (#35) after 7:45 from Dublin BART to San Ramon, which keeps people working a little late in office stranded."

"On Route 6 the last bus leaves Orinda at 8 PM, I would like to be able to stay later in Oakland, Berkeley, or San Francisco."

"I would ride more often IF the route 6 busses ran midday. That big break from noon to 2pm means I either sit and wait at BART for probably an hour and a half or impose on a friend to pick me up."

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Expanded Service Coverage

Expanded service coverage was another top request among respondents and was consistent with findings from earlier survey questions. 200 comments were received stating that service is not available or is too far from home and/or asking for the introduction of new routes, more local neighborhood routing, and stops closer to home. A number of comments requested that County Connection restore former routes, stops, or service levels. A common issue cited in the comments was that existing routes and bus stops are too far from people's homes, with walking distances to the nearest stop that are too far or too time consuming to make it worthwhile to ride the bus.

*"We would use County Connection if it were more accessible.
Closest bus service is at least 2 miles away."*

"You need to have better coverage to residential areas."

"I would like to have services closer to my home so I could use County Connection."

*"Right now, the closet stop is about two miles from my house.
I am willing to walk 1/2 miles, but no further."*

Many individuals expressed a desire for bus service, including smaller shuttle vehicles, that can provide more local coverage within residential neighborhoods. Another issue commonly raised was the need to have routes that are more local-oriented, to provide greater access to grocery stores, local shopping and dining, and medical facilities. These respondents noted that many of the existing routes are designed to provide access to BART, which in some cases makes it a challenge to access local destinations.

"Some sort of shuttle in neighborhoods that connect to bus routes. It is difficult to walk several blocks when carrying shopping or work items especially in cold and rainy weather."

"Buy smaller buses or vans and run them into the neighborhoods where the people are."

"In Walnut Creek busses ONLY go to BART. To get from my north side of town to the south side of the Bart station, including downtown itself and my children's schools/ bus stop, we need to transfer at the Bart station. A 10-15 minute drive across town becomes a 45-60 minute bus ride including transfer time."

"I use bus lines when they have stops near my home and go to places that are relevant to my needs, such as shopping or movie theaters."

2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Analysis and Findings
December 15, 2017

Direct Service

More direct service was another theme that arose in earlier survey questions and was reiterated by respondents in this final question. Over 100 comments were received expressing a desire for more direct services that can link origin and destination trip patterns more efficiently, providing faster overall travel times and reducing the need for transfers. Direct local routing for faster routes, providing links between cities and other key destinations outside of BART stations was a common request. More express routes within the central county, particularly connecting to BART were also highly desired. Another common issue relating to direct service was the request for long-distance commuter service with destinations such as San Francisco, Oakland, and Santa Clara County/Silicon Valley that would reduce the needs for transfers to other transit systems.

"Bus gets you to BART easily. Would be great if you could easily get to other places easily and without having to go via BART stations."

"More buses doing fewer stops and running directly to BART will be really useful. Parking in BART is a mess; so County Connection should be able to bank on this opportunity; instead we are seeing routes that take 30-40 minutes while driving takes 5-7 minutes."

"BART shouldn't be the only means of transportation to San Francisco. It would be great to have a bus that goes to SF, especially for commuters."

"Express to BART would be high value. Half my neighborhood goes to Walnut Creek BART and we all drive separately due to varying schedules."

3.6.3 Top Themes Not Covered in Survey

As mentioned, through the open-ended comments, respondents shared a desire for a range of improvements and investment opportunities for County Connection that were not explored in the survey. Common themes expressed by respondents included the need for County Connection to market and promote its services more, the desire for enhancements to the on-board experience, the use of smaller vehicles to allow County Connection to more efficiently meet passenger demand, and new services to better serve the community's middle schools and high schools.

School Routes

Service to local middle schools and high schools was commonly requested and was not explicitly addressed within any of the previous survey questions. Over 120 comments were received requesting new routes to schools, adding trips for zero period classes, and improved coordination with school bell times. Some respondents also expressed the need for additional routes to both DVC campuses and later evening trips that coincide with the college class schedules.

"I would like to see more direct routes to/from high schools, middle schools, colleges."

"Set a schedule that coincides with high school start & end times. My kids would take the bus every day, but several days a week there just isn't enough time to make it from their classrooms to the bus stop in time. The next bus leaves an entire hour later, too long to wait."

"Please provide more school buses especially to high schools. The traffic congestion in the mornings can be reduced drastically."

2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Analysis and Findings
December 15, 2017

Vehicles

88 comments were received regarding vehicle type and size. The majority of these comments were from respondents suggesting that County Connection explore the use of smaller buses or vans to better match capacity with customer demand. There is a general consensus among respondents regarding vehicle size in that County Connection's current buses are wasteful because they are "too big" and "are never full."

"Bet you could save money by running smaller buses rather than the full sized empty ones I see on the roads."

"Never like seeing giant buses with few aboard. Maybe some smaller vehicles would be more practical?"

"Buses are never full. Have you consider replacing the large buses with smaller ones or vans?"

Respondents suggested using smaller vehicles and using the potential cost savings to operate the routes more frequently. It was also felt that smaller vehicles would be a better fit for many of the low density residential neighborhoods that make up County Connection's service area and could be used to expand service coverage to new communities.

"Create a few small low capacity buses which runs more frequent, like every 15 minutes or so."

"Instead of operating the big expensive buses which are often hardly occupied, reduce cost and increase frequency by operating smaller vans. . . It is a waste of fuel and equipment to see those big buses driving around empty most of the time."

"Buy smaller buses or vans and run them into the neighborhoods where the people are."

On-Board Experience

On-board experience was another area where respondents desired improvement, with 85 comments received on a range of issues such as cleanliness, safety, operator behavior, on-board Wi-Fi, and the Transit App/Bus Tracker. Respondents expressed some concerns related to the cleanliness of buses and their personal safety on-board due to the actions of other passengers. Wi-Fi was an on-board amenity requested by multiple respondents, while a handful of others suggested improving the accuracy of the bus location and estimated arrival times presented on the Transit App or Bus Tracker platform.

"I don't think public transportation is clean enough, safe enough or convenient for the majority of my travel."

"Improve the bus appearance, add Wi-Fi, have dedicated bus lanes so this will encourage the community to take the bus rather than drive."

"Safety and cleanliness of buses would be a good improvement for customers."

"The Transit App sometimes shows that the bus is coming, and you just stand there and nothing comes for another 10 minutes. More reliable app would help the rider to know if they can depend on the bus services."

2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Analysis and Findings
December 15, 2017

Marketing and Service Promotion

64 comments were received regarding the need for County Connection to advertise more and educate the public about the services the agency provides. This shows that residents value County Connection and the services it provides, but want it to play a bigger role in helping to address congestion by encouraging greater use of its services. Route and schedule information that is easier to access and understand was also suggested. Some respondents cited that route maps (both printed and online) need to be easier to understand and that stops should have clearer route information, maps, and schedules.

"Publicize better. Explain to folks (including me) why I should use it, in terms of advantages for individual."

"Advertise! I've never even heard of you after living here for two years. Maybe target college students or seniors if you offer free fares? Mail out route maps."

"Promote your services, schedules and bus stops via advertising so that many more will know about your services."

"Make routes, times, and stop locations easier to find."

4.0 CONCLUSIONS

In engaging with over 2,900 residents throughout Central Contra Costa County, the Fixed Route Community Survey found that the County Connection brand has high awareness among survey respondents. County Connection's physical assets and presence, including buses, BART station facilities and signage, and bus stops, have a strong role in creating brand awareness in the community.

Findings suggest that while survey respondents are aware of the County Connection brand, most lack knowledge of information about routes, schedules, the location of nearby stops, and/or how to ride and pay fares. While one-third of respondents indicated having an interest in riding County Connection, increased education regarding the services it provides is needed overcome knowledge-based barriers that prevent them from taking the bus. Friends and family, schools, social media, neighborhood websites, employer commute programs, and Clipper Card are all relevant channels through which survey respondents have learned about County Connection and can continue to be used for education and outreach in the future.

County Connection was rated the highest, relative to BART and ridesharing, in terms of value for money, but rated lowest in providing an alternative to driving. Survey respondents identified a range of issues with the existing service that present barriers to increasing County Connection's ridership and make it difficult for County Connection to rank well in terms of providing alternate options to driving. Former County Connection riders indicated that infrequent buses and the transfer penalty associated with transferring to infrequent services are primary reasons for no longer utilizing County Connection. Similarly, current BART riders that do not ride County Connection to the station, identified several reasons for this, including that the bus is too infrequent, the bus takes too long, and transferring is too time consuming.

When asked about investment priorities, surveyed residents desire expanded public transportation investments above expanded roads, highways and freeways. They also desire maintaining existing roads, highways, and freeways, and building more sidewalks, bike lanes, and paths to encourage more active transportation. In terms of investments for County Connection that can increase ridership, residents indicated a preference for buses that run every 15-minutes; bus stops closer to home or destination; and more on-demand options. These top three priorities remain the same when examining only non-rider responses, indicating a desire among all groups for expanded and more convenient public transit in Central Contra Costa County.

Other issues highlighted by respondents that County Connection may want to examine in more detail as a way to increase ridership include, expanding marketing, education, and public outreach efforts to familiarize more residents with County Connection, enhancing the on-board customer experience, using smaller vehicles to better match service levels with customer demand and increase service frequency, and working with local communities to evaluate the ways to best serve the transportation needs of middle and high school students.

APPENDIX

2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Appendix A Online Survey Instrument
December 15, 2017

Appendix A ONLINE SURVEY INSTRUMENT

County Connection

County Connection Community Survey

* 1. Select your preferred language / *Seleccione su idioma preferido*

- English
- Español

* 2. Please enter your home zip code / Por favor induzca el código postal de su casa

County Connection

County Connection Community Survey

County Connection is interested in hearing from you so we can help improve transportation in your community. Your opinions are valuable to us and will help us learn what is important to residents. All surveys will be kept confidential. Please do not fill out the survey more than once.

Thank you for your feedback!

* 3. In the past 30 days, how many days did you ride on the services of any of the following public transit agencies?



- Zero / None
- 1 - 10 days
- More than 10 days

* 4. What is your familiarity with BART?

- High familiarity (i.e. know how to ride, know of multiple stations or destinations)
- Some familiarity (i.e. know about it, know where the closest station is, and at least one destination)
- No knowledge (i.e. never heard of BART)

* 5. How would you rate the value of BART? Rate each statement on a scale of 1-5, where 5 is highest value.

	1 - low value	2	3	4	5 - high value	No opinion
Value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value to the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for reducing traffic congestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for providing an alternative to driving myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 6. Do you currently ride BART?

- No
- Yes, 5 days a week or more
- Yes, 3-4 days a week
- Yes, 1-2 days a week
- Yes, a few times a month or less

* 7. What is your familiarity with ridesourcing (i.e. Uber and Lyft)?

- High familiarity (i.e. aware of the companies and the services they provide; have used and requested rides in the past)
- Some familiarity (i.e. know about the companies, but have never used them)
- No knowledge (i.e. never heard of Uber or Lyft)

County Connection

County Connection Community Survey

* 8. How would you rate the value of ridesourcing (i.e. Uber and Lyft)? Rate each statement on a scale of 1-5, where 5 is highest value.

	1 - low value	2	3	4	5 - high value	No opinion
Value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value to the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for reducing traffic congestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for providing alternate options to driving myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 9. Select the top priorities for future transportation investment in your community (Select up to 3):

- Maintaining and repairing existing roads, highways and freeways
- Expanding roads, highways, and freeways
- Building more sidewalks, bike lanes, and paths
- Expanding public transportation, including trains, buses, and on-demand options
- Develop a passenger transportation service that makes use of self-driving vehicles
- Promoting carshare, vanpooling, and carpooling
- Building dedicated bus lanes and transit signal priority

* 10. County Connection operates 25 weekday routes, 7 express routes, and 19 school routes in your community.

Before receiving this survey, what was your familiarity with County Connection?

- High familiarity (i.e. know of one or more bus routes and how to ride)
- Some familiarity (i.e. aware of the name and have seen buses on the road or at BART)
- No knowledge (i.e. never heard of or ridden County Connection)

11. How did you hear about County Connection? (select all that apply)

- I am a current rider
- I am a former rider
- Family member or friend uses County Connection
- Seen buses on the road
- Seen buses or signage at BART stations
- Website, Transit App, Google Maps, or another online source
- Community Event
- Child's school
- Other (please specify)

* 12. How would you rate the value of County Connection? Rate each statement on a scale of 1-5, where 5 is highest value.

County Connection

\$2 local cash fares

service from:
6am - 9pm weekdays

Pay with Clipper

3.5 million annual riders

We connect our riders to:

work 42% school 17% shopping 11% healthcare 6%

connections at:
Orinda
Lafayette
Walnut Creek
Pleasant Hill
Concord
North Concord/Martinez
Dublin/Pleasanton

	1 - low value	2	3	4	5 - high value	No opinion
Value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value to the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for reducing traffic congestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value for providing alternate options to driving myself	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 13. Do you know where the County Connection bus stop closest to your home is?

- Yes
- No - not sure where it is

* 14. Which of the following best describes you?

- I currently ride County Connection buses regularly or occasionally
- I currently ride County Connection LINK paratransit regularly or occasionally
- I used to ride, but I no longer ride County Connection buses
- I have never ridden or rarely ride County Connection buses

* 15. How often do you ride County Connection?

- 5 days a week or more
- 3-4 days a week
- 1-2 days a week
- A few times a month
- Occasionally (once every few months)

* 16. Over the last three years, would you say County Connection service has...

- Improved
- Stayed the same
- Gotten worse
- Don't know

* 17. How often do you ride County Connection LINK Paratransit?

- 5 days a week or more
- 3-4 days a week
- 1-2 days a week
- A few times a month
- Occasionally (once every few months)

* 18. Over the last three years, would you say County Connection LINK Paratransit service has...

- Improved
- Stayed the same
- Gotten worse
- Don't know

* 19. You indicated you used to ride County Connection. Why do you no longer use County Connection?
(select all that apply)

- Changed jobs or work location
- Moved
- Purchased a car
- I get rides from family or friends instead
- I use taxis, Uber, or Lyft instead
- Buses were too slow
- Buses were too expensive
- Buses were too infrequent
- Transfers between buses and BART took too much time
- Transfers between buses were challenging or took too much time
- Other (please specify)

County Connection

County Connection Community Survey

* 20. For the trips you make on a daily basis, do you?

- Drive (including by car, motorcycle, carpool, Uber/Lyft, taxi, etc.)
- Walk
- Bicycle, scooter, or skateboard
- Take public transit (not County Connection)
- Other (please specify)

County Connection

County Connection Community Survey

* 21. Which public transit service/provider do you ride?

* 22. Do you agree or disagree with the following statements regarding County Connection service?

	Agree	Disagree	Don't know
Service is available in my area	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know how to ride or pay fares	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I know where to find schedule and route information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My journey by public transit would require multiple transfers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. If you ride BART, why do you choose not to use County Connection to get to BART? (select all that apply)

- I live within walking / cycling distance of BART
- Service is not available in my area
- Don't want to pay a separate bus fare when transferring to/from BART
- It's easier to drive to the station
- I need a car for errands or to pick up kids, family, etc.
- The bus takes too long
- The bus is too infrequent
- The bus does not run early or late enough
- I worry about missing my bus if BART is delayed
- Transferring between buses and BART is too time consuming
- Other (please specify)

* 24. How likely is it that you will use County Connection's bus services in the future?

- Very likely
- Somewhat likely
- Unlikely
- No chance at all

* 25. Select the investment priorities for County Connection that would make you more likely to ride the bus or ride it more often? (Select up to 3)

- Buses that run every 15-minutes to connect you to/from BART
- More direct routes (i.e. fewer turns and travel on major roadways)
- More express routes (i.e. those that travel long distances without stopping)
- Fewer stops
- More on-demand options, such as partnerships with Uber or Lyft to provide connections to BART
- More routes with free fares to all customers
- More weekend service
- Dedicated bus lanes
- Improved bus stops, with amenities such as shelters, seating, lighting, or other amenities
- Stops closer to my home or destination

26. Are there any other improvements or investment priorities you recommend for County Connection?

Thank you for your input. So that we know more about who is taking our surveys, please tell us a bit about you.

* 27. What is your age?

- Under 18
- 18 – 24
- 25-34
- 35-44
- 45-54
- 55-64
- Over 64

* 28. What is your gender?

- Female
- Male
- Prefer not to say
- Prefer to self-describe

* 29. Which of the following best describes your race? Are you:

- White
- African American or Black
- Asian
- American Indian or Alaskan Native
- Native Hawaiian or other Pacific Islander
- Hispanic/Latino
- Other
- Prefer not to say

* 30. Last year, in 2016, what was your total household income from all sources, before taxes?

- Less than \$15,000
- \$15,000 to \$34,999
- \$35,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 or more
- Don't know / Prefer not to say

County Connection

County Connection Community Survey

County Connection está interesado en saber cómo podemos ayudar a mejorar el transporte en su comunidad. Sus opiniones son valiosas y nos ayudarán a aprender lo que es importante para los residentes de su área. Todas las encuestas se mantendrán confidenciales. No complete la encuesta más de una vez.

Gracias por sus comentarios!

* 33. En los últimos 30 días, cuántos días viajó en los servicios de cualquiera de las siguientes agencias de transporte público?



- Cero / Ningún
- 1 - 10 días
- Más de 10 días

* 34. Cuál es su familiaridad con BART?

- Alta familiaridad (sé cómo subirme, se de varias estaciones o destinos)
- Un poco de familiaridad (sé dónde está la estación más cercana y al menos un destino)
- Ningún conocimiento (nunca he oído hablar de BART)

* 35. Cómo calificaría el valor de BART? Calcule cada declaración en una escala de 1-5, donde 5 es el valor más alto.

	1 - poco valor	2	3	4	5 - alto valor	Sin opinión
Valor por el precio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor a la comunidad	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor para reducir la congestión del tráfico	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor al proveer una alternativa en lugar de conducir uno mismo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 36. Viaja actualmente en BART?

- No
- Sí, 5 días a la semana o más
- Sí, 3-4 días a la semana
- Sí, 1-2 días a la semana
- Sí, unas veces al mes o menos

* 37. Cuál es su familiaridad con las Empresas de Redes de Transporte (como Uber o Lyft)?

- Alta familiaridad (conozco las empresas y los servicios que ofrecen; he utilizado y solicitado viajes en el pasado)
- Un poco de familiaridad (conozco las empresas, pero nunca los he utilizado)
- Ningún conocimiento (nunca he oído hablar de Uber o Lyft)

* 38. Cómo calificaría el valor de las Empresas de Redes de Transporte (como Uber o Lyft)? Calcule cada declaración en una escala de 1-5, donde 5 es el valor más alto.

	1 - poco valor	2	3	4	5 - alto valor	Sin opinión
Valor por el precio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor a la comunidad	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor para reducir la congestión del tráfico	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor al proveer una alternativa el lugar de conducir uno mismo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 39. Seleccione las prioridades principales para inversiones en transporte en el futuro, en su comunidad (seleccione 3 o menos):

- Mantenimiento y reparación de carreteras y autopistas
- Expansión de carreteras y autopistas
- Construcción de más banquetas, carriles para bicicletas y senderos peatonales
- Expansión del transporte público, incluyendo trenes, autobuses y opciones de acceso a tránsito al instante
- Desarrollar un servicio de transporte de pasajeros que utiliza vehículos autónomos
- Promover vehículos compartidos y viajes compartidos
- Construcción de carriles de autobús y semáforos con prioridad para autobuses

* 40. County Connection opera 25 rutas locales, 7 rutas expresas y 19 rutas escolares en su comunidad.

Antes de recibir esta encuesta, cuál era su familiaridad con County Connection?

- Alta familiaridad (sé de una o más rutas de autobús y como subirme en el autobús)
- Un poco de familiaridad (conozco el nombre o he visto autobuses en la carretera o en las estaciones de BART)
- Ningún conocimiento (nunca he oído de o viajado en County Connection)

41. Cómo se enteró de County Connection? (seleccione toda opción que corresponda)

- Soy un pasajero actual
- Fuí pasajero
- Un miembro de mi familia o un amigo usa County Connection
- He visto los autobuses en la carretera
- He visto los autobuses o letreros en las estaciones de BART
- En el sitio web, Transit App (aplicación móvil), Google Maps u otro lugar en el internet
- Evento comunitario
- Escuela de mis hijos
- Otro (por favor especifica)

* 42. Cómo calificaría el valor de County Connection? Calcule cada declaración en una escala de 1-5, donde 5 es el valor más alto.

County Connection

\$2 tarifa local en efectivo

Servicio desde las:
6am - 9pm durante la semana

Pague con **Clipper**

3.5 millones de pasajeros anuales

Conectamos a nuestros pasajeros a:

trabajo	colegio	compras	asistencia médica
42%	17%	11%	6%

conexiones en: Orinda, Lafayette, Walnut Creek, Pleasant Hill, Concord, North Concord/Martinez, Dublin/Pleasanton

	1 - poco valor	2	3	4	5 - alto valor	Sin opinión
Valor por el precio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor a la comunidad	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor para reducir la congestión del tráfico	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Valor al proveer una alternativa el lugar de conducir uno mismo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 43. Sabe dónde queda la parada de autobús de County Connection más cercana a su casa?

- Sí
- No – no sé dónde está

* 44. Cuál de las siguientes opciones lo/la describe mejor?

- Actualmente viajo en los autobuses de County Connection regularmente o de vez en cuando
- Actualmente viajo en los servicios Paratransito (LINK) de County Connection regularmente o de vez en cuando
- Solía viajar, pero ya no viajo en los autobuses de County Connection
- Nunca he viajado o casi nunca uso los autobuses de County Connection

* 45. Con qué frecuencia viaja en los autobuses de County Connection?

- 5 días a la semana o más
- 3-4 días a la semana
- 1-2 días a la semana
- Un par de veces al mes
- Ocasionalmente (una vez cada mes o dos)

* 46. Durante los últimos tres años, diría usted que el servicio de County Connection ha...

- Mejorado
- Se mantuvo igual
- Empeorado
- No sé

* 47. Con qué frecuencia viaja en los servicios Paratránsito (LINK) de County Connection?

- 5 días a la semana o más
- 3-4 días a la semana
- 1-2 días a la semana
- Un par de veces al mes
- Ocasionalmente (una vez cada mes o dos)

* 48. Durante los últimos tres años, diría usted que el servicio Paratránsito (LINK) de County Connection ha...

- Mejorado
- Se mantuvo igual
- Empeorado
- No sé

* 49. Usted indicó que solía viajar en County Connection. Por qué ya no usa County Connection? (seleccione todo lo que corresponda)

- Cambié de trabajo o lugar de trabajo
- Me mudé
- Compré un coche
- Viajo con mi familia o amigos de vez en cuando
- Uso taxis, Uber, o Lyft
- Los autobuses eran demasiado lentos
- La tarifa era muy costosa
- Los autobuses eran demasiado infrecuentes
- Cambiar de autobús a BART era difícil o tomaba demasiado tiempo
- Cambiar entre autobuses era difícil o tomaba demasiado tiempo
- Otro (por favor especifica)

* 50. Para los viajes que realiza diariamente, cómo viaja?

- En coche (incluyendo por motocicleta, aventón, Uber/Lyft, o taxi)
- Camino
- Bicicleta, scooter, o patineta
- Transporte público (aparte de County Connection)
- Otro (por favor especifica)

County Connection

County Connection Community Survey

* 51. Con cuál proveedor de transporte público viaja usted?

* 52. Está usted de acuerdo o en desacuerdo con las siguientes declaraciones con respecto al servicio de County Connection?

	De acuerdo	en desacuerdo	no sé
Servicio de County Connection está disponible en mi área	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sé cómo viajar por autobús o pagar tarifas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sé dónde encontrar información de las rutas y horarios	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mi viaje en transporte público requeriría transferencias múltiples	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

53. Si usted viaja en BART, por qué decide no usar County Connection para llegar a BART? (seleccione todo lo que corresponda)

- Vivo cerca de BART y puedo caminar / ir en bicicleta
- El servicio no está disponible en mi área
- No deseo pagar una tarifa de autobús separada al transferir a / desde BART
- Es más fácil conducir hasta la estación
- Necesito un carro para hacer mandados o recoger a niños, familia, etc.
- El autobús toma demasiado tiempo
- El autobús es demasiado infrecuente
- El autobús no está en servicio lo suficientemente temprano o tarde
- Me preocupa perder mi autobús si BART se retrasa
- Transferir entre el bus y BART toma demasiado tiempo
- Otro (por favor especifica)

* 54. Qué tan probable es que usted use los servicios de autobús de County Connection en el futuro?

- Muy probable
- Un poco probable
- Improbable
- No hay oportunidad en absoluto

* 55. Seleccione las prioridades de inversión para County Connection que harían más probable que usted viaje en el autobús o que viaje más a menudo? (Seleccione hasta 3)

- Autobuses que pasen cada 15 minutos para conectarme con BART
- Más rutas directas (rutas con menos vueltas que se mantengan en las carreteras principales)
- Más rutas expresas (rutas que viajan largas distancias sin parar)
- Menos paradas
- Más opciones de acceso a tránsito al instante, como descuentos de Uber o Lyft para proveer conexiones a BART
- Más rutas con tarifas gratuitas para todos los pasajeros
- Más servicio los fines de semana
- Carriles de carretera dedicados para autobuses
- Mejores paradas de autobús, con servicios tales como refugios, bancas, iluminación u otros servicios
- Paradas de autobús más cerca de mi casa o destino

56. Qué otras mejoras o prioridades de inversión recomienda a County Connection?

Gracias por su participación. Para entender mejor los resultados de quien tomó nuestra encuesta, por favor, cuéntenos un poco sobre usted.

* 57. Cuál es su edad?

- Menos de 18
- 18 – 24
- 25-34
- 35-44
- 45-54
- 55-64
- Más de 64

* 58. Cuál es su género?

- Femenino
- Masculino
- Prefiero no decir
- Prefiero auto-describir

* 59. Cuál de las siguientes opciones describe mejor su raza?

- Blanco
- Afroamericano o Negro
- Asiático
- Indio Americano o Nativo de Alaska
- Nativo de Hawái u otra isla del Pacífico
- Hispano
- Otro
- Prefiero no decir

* 60. El año pasado, en 2016, cuál fue el ingreso total de su hogar de todos los habitantes, antes de impuestos?

- Menos de \$15,000
- \$15,000 a \$34,999
- \$35,000 a \$74,999
- \$75,000 a \$99,999
- \$100,000 o más
- No sé / Prefiero no decir

2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Appendix B Print Survey Instrument
December 15, 2017

Appendix B PRINT SURVEY INSTRUMENT



County Connection is interested in hearing from you so we can help improve transportation in your community. Your opinions are valuable to us and will help us learn what is important to residents. All surveys will be kept confidential.

1 In the past 30 days, how many days did you ride on the services of any of the following public transit agencies?



- Zero / None**
- 1 - 10 days**
- More than 10 days**

2 What is your familiarity with BART?

- High familiarity** (i.e. know how to ride, know of multiple stations or destinations)
- Some familiarity** (i.e. know about it, know where the closest station is, and at least one destination)
- No knowledge** (i.e. never heard of BART) **[skip to 5]**

3 Do you currently ride BART?

- No**
- Yes, 5 days a week or more**
- Yes, 3-4 days a week**
- Yes, 1-2 days a week**
- Yes, a few times a month**

4 How would you rate the value of BART?
Rate each statement on a scale of 1-5, where 5 is highest value.

Value for money	1	2	3	4	5	N/A
Value to the community	1	2	3	4	5	N/A
Value for reducing traffic congestion	1	2	3	4	5	N/A
Value for providing an alternative to driving myself	1	2	3	4	5	N/A

5 What is your familiarity with ridesourcing (i.e. Uber and Lyft)?

- High familiarity** (i.e. aware of the companies and the services they provide; have used and requested rides in the past)
- Some familiarity** (i.e. know about the companies, but have never used them)
- No knowledge** (i.e. never heard of Uber or Lyft) **[skip to 7]**

6 How would you rate the value of ridesourcing (i.e. Uber and Lyft)?
Rate each statement on a scale of 1-5, where 5 is highest value.

Value for money	1	2	3	4	5	N/A
Value to the community	1	2	3	4	5	N/A
Value for reducing traffic congestion	1	2	3	4	5	N/A
Value for providing an alternative to driving myself	1	2	3	4	5	N/A

- 7** Select the top priorities for future transportation investment in your community: *(Select up to 3)*
- Maintaining and repairing existing roads, highways and freeways**
 - Expanding roads, highways, and freeways**
 - Building more sidewalks, bike lanes, and paths**
 - Expanding public transportation, including trains, buses, and on-demand options**
 - Develop a passenger transportation service that makes use of self-driving vehicles**
 - Promoting carshare, vanpooling, and carpooling**
 - Building dedicated bus lanes and transit signal priority**

8 County Connection operates 25 weekday routes, 7 express routes, and 19 school routes in your community.

Before receiving this survey, what was your familiarity with County Connection?

- High familiarity** (i.e. know of one or more bus routes and how to ride)
- Some familiarity** (i.e. aware of the name and have seen buses on the road or at BART)
- No knowledge** (i.e. never heard of or ridden County Connection)
[skip to 16]

9 How did you hear about County Connection? *(Select all that apply)*

- I am a current rider**
- I am a former rider**
- Family member or friend uses County Connection**
- Seen buses on the road**
- Seen buses or signage at BART stations**
- Website, Transit App, Google Maps, or another online source**
- Community Event**
- Child's school**
- Other _____**

10 How would you rate the value of County Connection?
Rate each statement on a scale of 1-5, where 5 is highest value.

Value for money	1	2	3	4	5	N/A
Value to the community	1	2	3	4	5	N/A
Value for reducing traffic congestion	1	2	3	4	5	N/A
Value for providing an alternative to driving myself	1	2	3	4	5	N/A

11 Do you know where the County Connection bus stop closest to your home is?

- Yes**
- No - not sure where it is**

12 Which of the following best describes you?

- I currently ride County Connection buses regularly or occasionally**
[continue to 13]
- I currently ride County Connection LINK paratransit regularly or occasionally**
[continue to 13]
- I used to ride, but I no longer ride County Connection buses**
[skip to 15]
- I have never ridden or rarely ride County Connection buses**
[skip to 16]

EXISTING RIDERS

13 How often do you ride County Connection?

- 5 days a week or more**
- 3-4 days a week**
- 1-2 days a week**
- A few times a month**
- Occasionally (once every few months)**

14 Over the last three years, would you say County Connection service has...

- Improved**
- Stayed the same**
- Gotten worse**
- Don't know**

For all responses, skip to 20

FORMER RIDERS

15 You indicated you used to ride County Connection. Why do you no longer use County Connection? *(Select all that apply)*

- Changed jobs or work location**
- Moved**
- Purchased a home**
- I get rides from family or friends instead**
- I use taxis, Uber, or Lyft instead**
- Buses were too slow**
- Buses were too expensive**
- Buses were too infrequent**
- Transfers between buses and BART took too much time were too infrequent**
- Transfers between buses were challenging or took too much time**
- Other _____**

For all responses, skip to 20

NON-RIDERS

16 For the trips you make on a daily basis, do you? *(Select your primary mode)*

- Drive (including by car, motorcycle, carpool, Uber/Lyft, taxi, etc.)**
- Walk**
- Bicycle, scooter, or skateboard**
- Take public transit. I ride _____**
(name of public transit service/provider)
- Other _____**

*non-rider questions
continued on next page*

NON-RIDERS (CONTINUED)

17 Do you agree or disagree with the following statements regarding County Connection service?

Service is available in my area

- Agree Disagree Don't Know

I know how to ride or pay fares

- Agree Disagree Don't Know

I know where to find schedule and route information

- Agree Disagree Don't Know

My journey by public transit would require multiple transfers

- Agree Disagree Don't Know

18 If you ride BART, why do you choose not to use County Connection to get to BART? *(Select all that apply)*

I live within walking / cycling distance of BART

Service is not available in my area

Don't want to pay a separate bus fare when transferring to/from BART

It's easier to drive to the station

I need a car for errands or to pick up kids, family, etc.

The bus takes too long

The bus is too infrequent

The bus does not run early or late enough

I worry about missing my bus if BART is delayed

Transferring between buses and BART is too time consuming

Other _____

County Connection

\$2 local cash fares

service from: 6am - 9pm weekdays

Pay with **Clipper**

3.5 million annual riders

We connect our riders to:

work	school	shopping	healthcare
42%	17%	11%	6%

connections at: Orinda, Lafayette, Walnut Creek, Pleasant Hill, Concord, North Concord/Martinez, Dublin/Pleasanton

19 How likely is it that you will use County Connection's bus services in the future?

Very Likely

Somewhat likely

Unlikely

No chance at all

20 Select the investment priorities for County Connection that would make you more likely to ride the bus or ride it more often? *(Select up to 3)*

- Buses that run every 15-minutes to connect you to/from BART**
- More direct routes (i.e. fewer turns and travel on major roadways)**
- More express routes (i.e. those that travel long distances without stopping)**
- Fewer stops**
- More on-demand options, such as partnerships with Uber or Lyft to provide connections to BART**
- More routes with free fares to all customers**
- More weekend service**
- Dedicated bus lanes**
- Improved bus stops, with amenities such as shelters, seating, lighting, or other amenities**
- Stops closer to my home or destination**

21 Are there any other improvements or investment priorities you recommend for County Connection?

Thank you for your input. So that we know more about who is taking our surveys, please tell us a bit about you.

22 What is your age? _____

23 What is your gender? _____

24 Which of the following best describes your race?

- White**
- African American or Black**
- Asian**
- American Indian or Alaskan Native**
- Native hawaiian or other Pacific Islander**
- Hispanic/Latino**
- Other**

25 Last year, in 2016, what was your total household income from all sources, before taxes?

- Less than \$15,000**
- \$15,000 to \$34,999**
- \$35,000 to \$74,999**
- \$75,000 to \$99,999**
- \$100,000 or more**
- Don't know / Prefer not to say**

26 What is your home zip code?

County Connection está interesado en saber cómo podemos ayudar a mejorar el transporte en su comunidad. Sus opiniones son valiosas y nos ayudarán a aprender lo que es importante para los residentes de su área. Todas las encuestas se mantendrán confidenciales. No complete la encuesta más de una vez.

1 En los últimos 30 días, ¿cuántos días viajó en los servicios de cualquiera de las siguientes agencias de transporte público?



- Cero / Ningún
- 1 - 10 días
- Más de 10 días

2 ¿Cuál es su familiaridad con BART?

- Alta familiaridad** (sé cómo subirme, se de varias estaciones o destinos)
- Un poco de familiaridad** (sé dónde está la estación más cercana y al menos un destino)
- Ningún conocimiento** (nunca he oído hablar de BART)
[pase a la pregunta 5]

3 ¿Viaja actualmente en BART?

- No
- Sí, 5 días a la semana o más
- Sí, 3-4 días a la semana
- Sí, 1-2 días a la semana
- Sí, unas veces al mes o menos

4 ¿Cómo calificaría el valor de BART?
Calcule cada declaración en una escala de 1-5, donde 5 es el valor más alto.

Valor por el precio	1	2	3	4	5	N/A
Valor a la comunidad	1	2	3	4	5	N/A
Valor para reducir la congestión del tráfico	1	2	3	4	5	N/A
Valor al proveer una alternativa en lugar de conducir uno mismo	1	2	3	4	5	N/A

5 ¿Cuál es su familiaridad con las Empresas de Redes de Transporte (como Uber o Lyft)?

- Alta familiaridad** (conozco las empresas y los servicios que ofrecen; he utilizado y solicitado viajes en el pasado)
- Un poco de familiaridad** (conozco las empresas, pero nunca los he utilizado)
- Ningún conocimiento** (nunca he oído hablar de Uber o Lyft)
[pase a la pregunta 7]

6 ¿Cómo calificaría el valor de las Empresas de Redes de Transporte (como Uber o Lyft)?
Calcule cada declaración en una escala de 1-5, donde 5 es el valor más alto.

Valor por el precio	1	2	3	4	5	N/A
Valor a la comunidad	1	2	3	4	5	N/A
Valor para reducir la congestión del tráfico	1	2	3	4	5	N/A
Valor al proveer una alternativa en lugar de conducir uno mismo	1	2	3	4	5	N/A

- 7** Seleccione las prioridades principales para inversiones en transporte en el futuro, en su comunidad:
(seleccione 3 o menos)
- Mantenimiento y reparación de carreteras y autopistas**
 - Expansión de carreteras y autopistas**
 - Construcción de más banquetas, carriles para bicicletas y senderos peatonales**
 - Expansión del transporte público, incluyendo trenes, autobuses y opciones de acceso a tránsito al instante**
 - Desarrollar un servicio de transporte de pasajeros que utiliza vehículos autónomos**
 - Promover vehículos compartidos y viajes compartidos**
 - Construcción de carriles de autobús y semáforos con prioridad para autobuses**

8 County Connection opera 25 rutas locales, 7 rutas expresas y 19 rutas escolares en su comunidad.

Antes de recibir esta encuesta, ¿cuál era su familiaridad con County Connection?

- Alta familiaridad** (sé de una o más rutas de autobús y como subirme en el autobús)
- Un poco de familiaridad** (conozco el nombre o he visto autobuses en la carretera o en las estaciones de BART)
- Ningún conocimiento** (nunca he oído de o viajado en County Connection)
[pase a la pregunta 16]

9 ¿Cómo se enteró de County Connection?
(seleccione toda opción que corresponda)

- Soy un pasajero actual**
- Fuí pasajero**
- Un miembro de mi familia o un amigo usa County Connection**
- He visto los autobuses en la carretera**
- He visto los autobuses o letreros en las estaciones de BART**
- En el sitio web, Transit App (aplicación móvil), Google Maps u otro lugar en el internet**
- Evento comunitario**
- Escuela de mis hijos**
- Otro** _____

10 ¿Cómo calificaría el valor de County Connection?

Calcule cada declaración en una escala de 1-5, donde 5 es el valor más alto.

Valor por el precio	1	2	3	4	5	N/A
Valor a la comunidad	1	2	3	4	5	N/A
Valor para reducir la congestión del tráfico	1	2	3	4	5	N/A
Valor al proveer una alternativa en lugar de conducir uno mismo	1	2	3	4	5	N/A

11 ¿Sabe dónde queda la parada de autobús de County Connection más cercana a su casa?

- Sí**
- No - no sé dónde está**

12 ¿Cuál de las siguientes opciones lo/la describe mejor?

- Actualmente viajo en los autobuses de County Connection regularmente o de vez en cuando**
[continúe a la pregunta 13]
- Actualmente viajo en los servicios Paratránsito (LINK) de County Connection regularmente o de vez en cuando**
[continúe a la pregunta 13]
- Solía viajar, pero ya no viajo en los autobuses de County Connection**
[pase a la pregunta 15]
- Nunca he viajado o casi nunca uso los autobuses de County Connection**
[pase a la pregunta 16]

PASAJEROS ACTUALES

13 ¿Con qué frecuencia viaja en los autobuses de County Connection?

- 5 días a la semana o más**
- 3-4 días a la semana**
- 1-2 días a la semana**
- Un par de veces al mes**
- Ocasionalmente (una vez cada mes o dos)**

14 Durante los últimos tres años, ¿diría usted que el servicio de County Connection ha...

- Mejorado**
- Se mantuvo igual**
- Empeorado**
- No sé**

**Para todas las respuestas,
pase a la pregunta 20**

EX PASAJEROS

15 Usted indicó que solía viajar en County Connection. ¿Por qué ya no usa County Connection? (*seleccione todo lo que corresponda*)

- Cambié de trabajo o lugar de trabajo**
- Me mudé**
- Compré un coche**
- Viajo con mi familia o amigos**
- Uso taxis, Uber, o Lyft**
- Los autobuses eran demasiado lentos**
- La tarifa era muy costosa**
- Los autobuses eran demasiado infrecuentes**
- Cambiar de autobús a BART era difícil o tomaba demasiado tiempo**
- Cambiar entre autobuses era difícil o tomaba demasiado tiempo**
- Otro _____**

**Para todas las respuestas,
pase a la pregunta 20**

NO PASAJEROS

16 ¿Para los viajes que realiza diariamente, cómo viaja? (*Seleccione su modo principal*)

- En coche (incluyendo por motocicleta, aventón, Uber/Lyft, o taxi)**
- Camino**
- Bicicleta, scooter, o patineta**
- Transporte público. Yo uso _____**
(Nombre de la agencia de tránsito)
- Otro _____**

17 ¿Está usted de acuerdo o en desacuerdo con las siguientes declaraciones con respecto al servicio de County Connection?

Servicio de County Connection está disponible en mi área

De acuerdo En desacuerdo No sé

Sé cómo viajar por autobús o pagar tarifas

De acuerdo En desacuerdo No sé

Sé dónde encontrar información de las rutas y horarios

De acuerdo En desacuerdo No sé

Mi viaje en transporte público requeriría transferencias múltiples

De acuerdo En desacuerdo No sé

18 Si usted viaja en BART, ¿por qué decide no usar County Connection para llegar a BART?

(seleccione todo lo que corresponda)

- Vivo cerca de BART y puedo caminar / ir en bicicleta
- El servicio no está disponible en mi área
- No deseo pagar una tarifa de autobús separada al transferir a / desde BART
- Es más fácil conducir hasta la estación
- Necesito un carro para hacer mandados o recoger a niños, familia, etc.
- El autobús toma demasiado tiempo
- El autobús es demasiado infrecuente
- El autobús no está en servicio lo suficientemente temprano o tarde
- Me preocupa perder mi autobús si BART se retrasa
- Transferir entre el bus y BART toma demasiado tiempo
- Otro _____

County Connection

\$2 
tarifa local en efectivo

Servicio desde las:



6am - 9pm
durante la semana



Pague con
Clipper



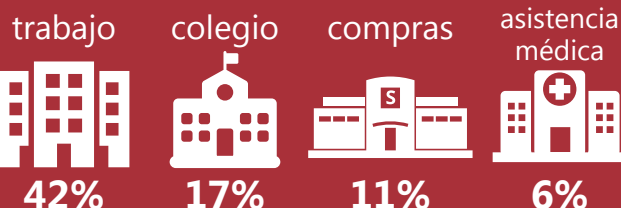
conexiones en:

Orinda
Lafayette
Walnut Creek
Pleasant Hill
Concord
North Concord/
Martinez
Dublin/Pleasanton

3.5 millones
de pasajeros anuales



Conectamos a
nuestros pasajeros a:



19 ¿Qué tan probable es que usted use los servicios de autobús de County Connection en el futuro?

- Muy probable
- Un poco probable
- Improbable
- No hay oportunidad en absoluto

20 Seleccione las prioridades de inversión para County Connection que harían más probable que usted viaje en el autobús o que viaje más a menudo?

(Seleccione hasta 3)

- Autobuses que pasen cada 15 minutos para conectarme con BART**
- Más rutas directas (rutas con menos vueltas que se mantengan en las carreteras principales)**
- Más rutas expresas (rutas que viajan largas distancias sin parar)**
- Menos paradas**
- Más opciones de acceso a tránsito al instante, como descuentos de Uber o Lyft para proveer conexiones a BART**
- Más rutas con tarifas gratuitas para todos los pasajeros**
- Más servicio los fines de semana**
- Carriles de carretera dedicados para autobuses**
- Mejores paradas de autobús, con servicios tales como refugios, bancas, iluminación u otros servicios**
- Paradas de autobús más cerca de mi casa o destino**

21 ¿Qué otras mejoras o prioridades de inversión recomienda a County Connection?

Gracias por su participación. Para entender mejor los resultados de quien tomó nuestra encuesta, por favor, cuéntenos un poco sobre usted.

22 ¿Cuál es su edad? _____

23 ¿Cuál es su género? _____

24 ¿Cuál de las siguientes opciones describe mejor su raza?

- Blanco**
- Afroamericano o Negro**
- Asiático**
- Indio Americano o Nativo de Alaska**
- Nativo de Hawái u otra isla del Pacífico**
- Hispano/Latino**
- Otro**

25 El año pasado, en 2016, ¿cuál fue el ingreso total de su hogar de todos los habitantes, antes de impuestos?

- Menos de \$15,000**
- \$15,000 a \$34,999**
- \$35,000 a \$74,999**
- \$75,000 a \$99,999**
- \$100,000 o más**
- No sé / Prefiero no decir**

26 ¿Cuál es el código postal de su casa?

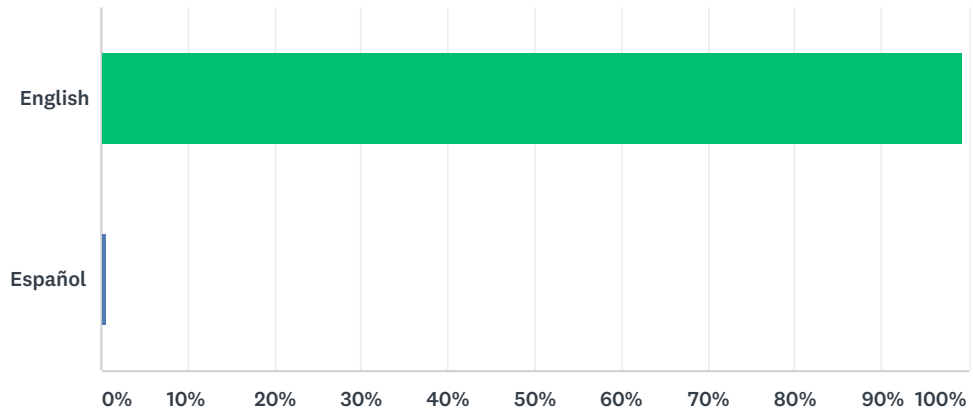
2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Appendix C Full Survey Results
December 15, 2017

Appendix C FULL SURVEY RESULTS

Q1 Select your preferred language / Seleccione su idioma preferido

Answered: 2,940 Skipped: 0



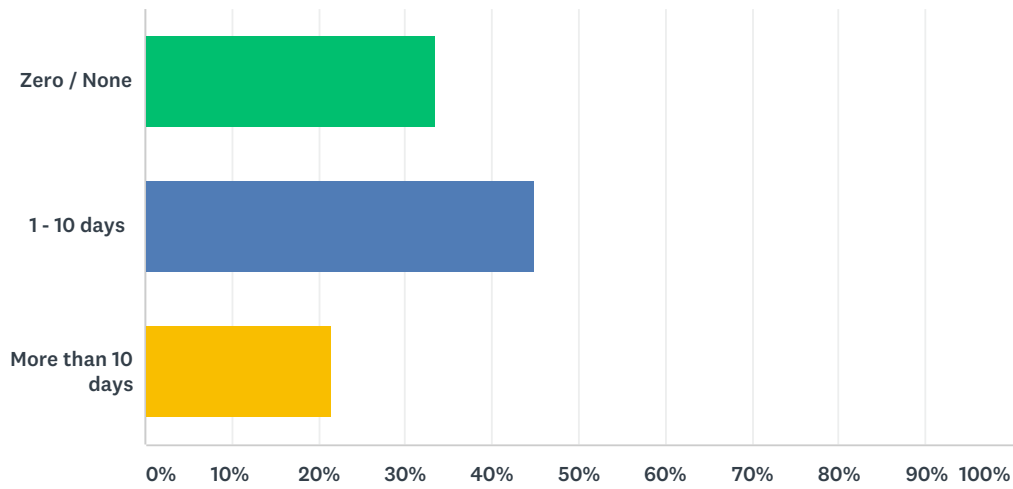
ANSWER CHOICES	RESPONSES
English	99.35% 2,921
Español	0.65% 19
TOTAL	2,940

Q2 Please enter your home zip code / Por favor induzca el código postal de su casa

Answered: 2,940 Skipped: 0

Q3 In the past 30 days, how many days did you ride on the services of any of the following public transit agencies?

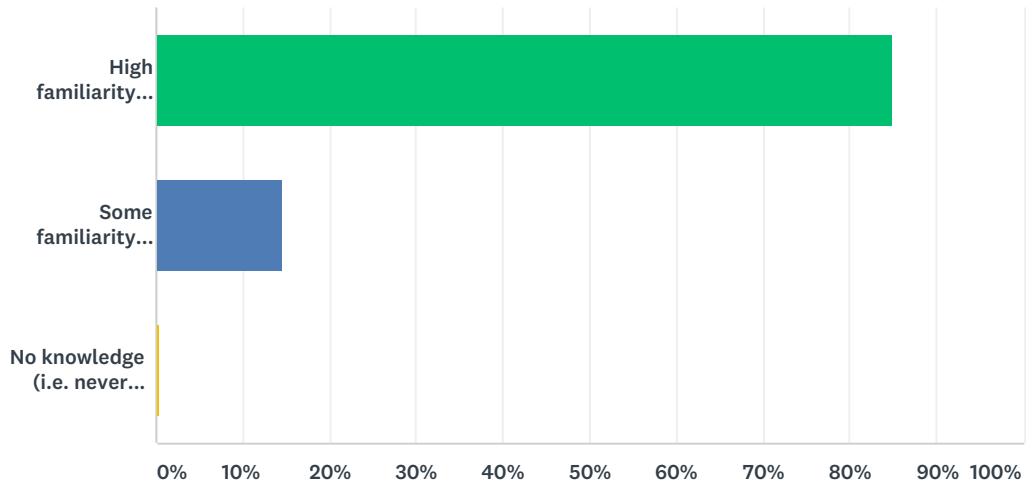
Answered: 2,811 Skipped: 129



ANSWER CHOICES	RESPONSES
Zero / None	33.48% 941
1 - 10 days	44.97% 1,264
More than 10 days	21.56% 606
TOTAL	2,811

Q4 What is your familiarity with BART?

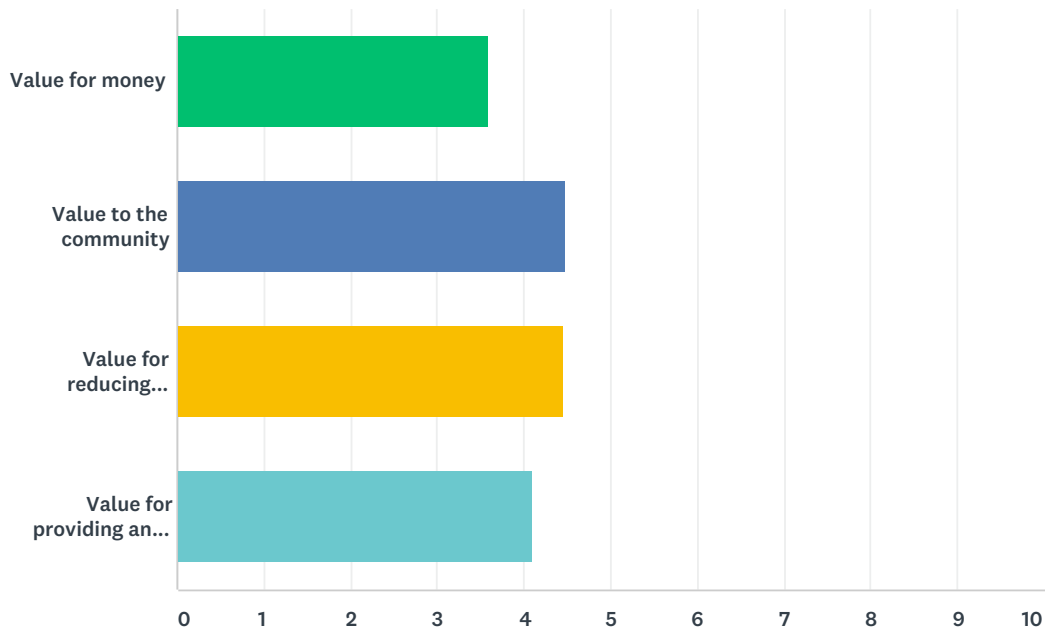
Answered: 2,811 Skipped: 129



ANSWER CHOICES	RESPONSES	
High familiarity (i.e. know how to ride, know of multiple stations or destinations)	84.95%	2,388
Some familiarity (i.e. know about it, know where the closest station is, and at least one destination)	14.66%	412
No knowledge (i.e. never heard of BART)	0.39%	11
TOTAL		2,811

Q5 How would you rate the value of BART? Rate each statement on a scale of 1-5, where 5 is highest value.

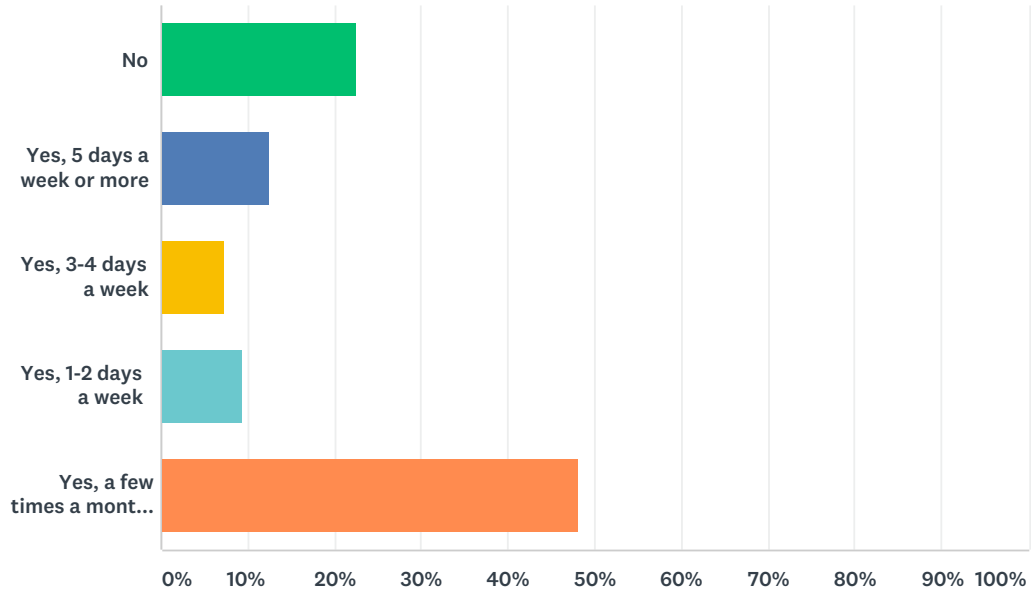
Answered: 2,739 Skipped: 201



	1 - LOW VALUE	2	3	4	5 - HIGH VALUE	NO OPINION	TOTAL	WEIGHTED AVERAGE
Value for money	6.61% 181	11.24% 308	29.43% 806	25.01% 685	25.12% 688	2.59% 71	2,739	3.59
Value to the community	1.97% 54	3.36% 92	8.76% 240	18.04% 494	66.41% 1,819	1.46% 40	2,739	4.48
Value for reducing traffic congestion	1.86% 51	3.65% 100	9.64% 264	18.18% 498	65.35% 1,790	1.31% 36	2,739	4.45
Value for providing an alternative to driving myself	7.78% 213	5.77% 158	12.52% 343	17.31% 474	54.44% 1,491	2.19% 60	2,739	4.11

Q6 Do you currently ride BART?

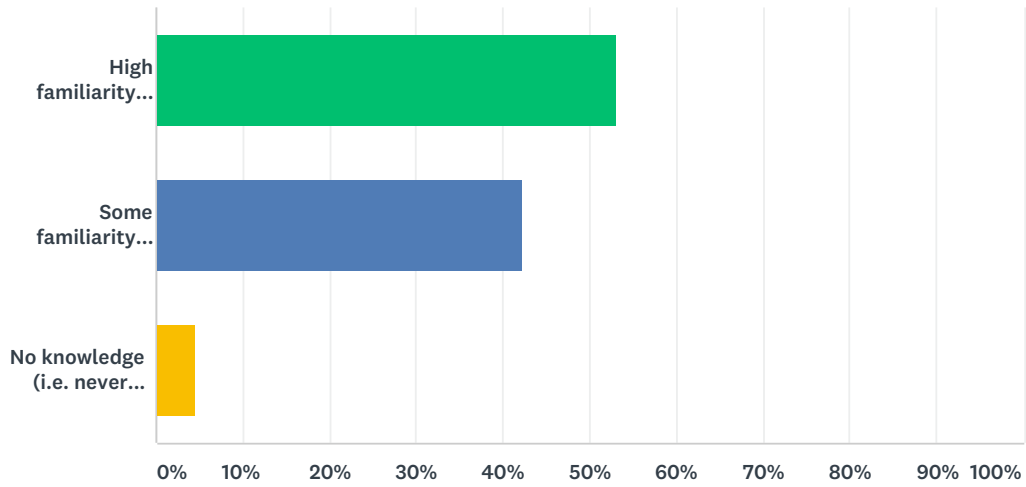
Answered: 2,739 Skipped: 201



ANSWER CHOICES	RESPONSES	
No	22.56%	618
Yes, 5 days a week or more	12.52%	343
Yes, 3-4 days a week	7.41%	203
Yes, 1-2 days a week	9.46%	259
Yes, a few times a month or less	48.05%	1,316
TOTAL		2,739

Q7 What is your familiarity with ridesourcing (i.e. Uber and Lyft)?

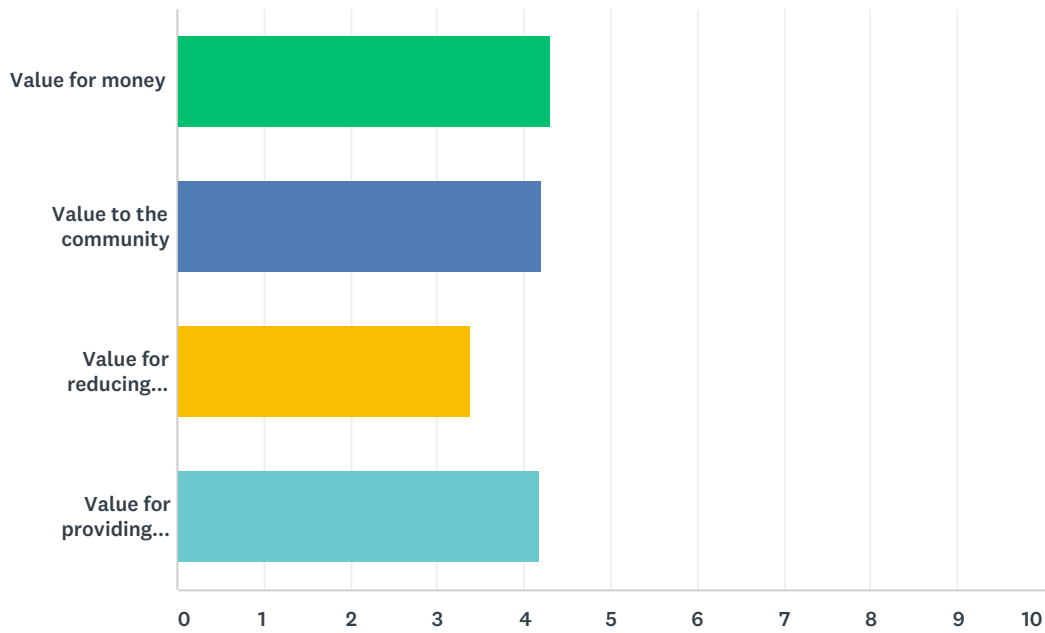
Answered: 2,750 Skipped: 190



ANSWER CHOICES	RESPONSES	
High familiarity (i.e. aware of the companies and the services they provide; have used and requested rides in the past)	53.09%	1,460
Some familiarity (i.e. know about the companies, but have never used them)	42.36%	1,165
No knowledge (i.e. never heard of Uber or Lyft)	4.55%	125
TOTAL		2,750

Q8 How would you rate the value of ridesourcing (i.e. Uber and Lyft)? Rate each statement on a scale of 1-5, where 5 is highest value.

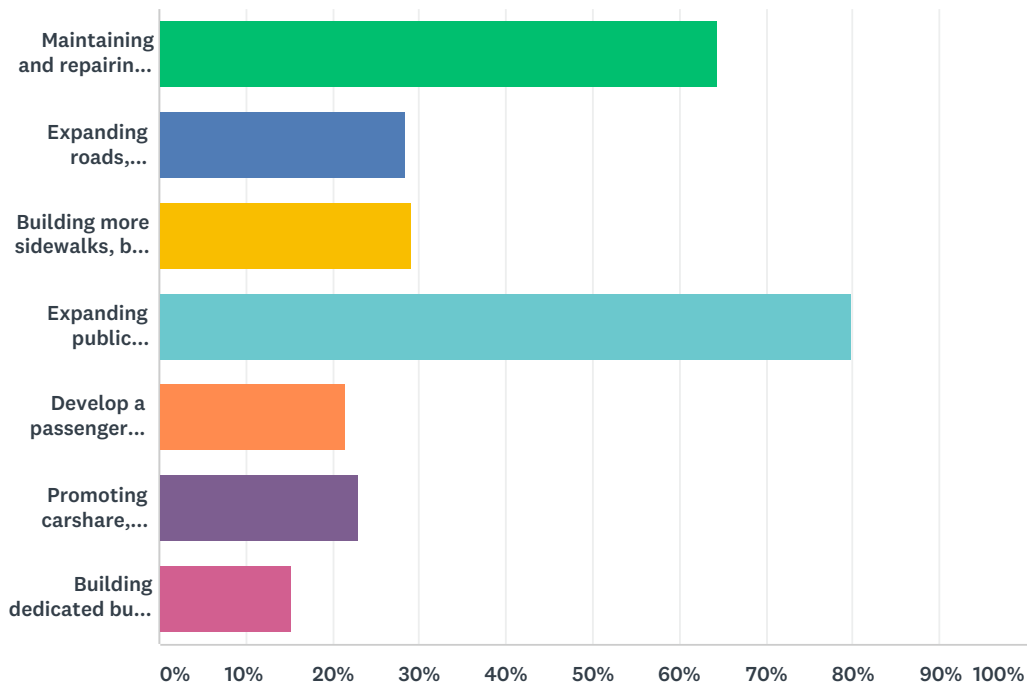
Answered: 2,567 Skipped: 373



	1 - LOW VALUE	2	3	4	5 - HIGH VALUE	NO OPINION	TOTAL	WEIGHTED AVERAGE
Value for money	2.49% 64	4.83% 124	19.59% 503	24.78% 636	27.81% 714	20.49% 526	2,567	4.32
Value to the community	3.19% 82	5.57% 143	20.57% 528	24.54% 630	31.16% 800	14.96% 384	2,567	4.20
Value for reducing traffic congestion	16.24% 417	17.06% 438	23.88% 613	13.25% 340	14.02% 360	15.54% 399	2,567	3.38
Value for providing alternate options to driving myself	6.47% 166	6.43% 165	13.99% 359	21.31% 547	39.74% 1,020	12.08% 310	2,567	4.18

Q9 Select the top priorities for future transportation investment in your community (Select up to 3):

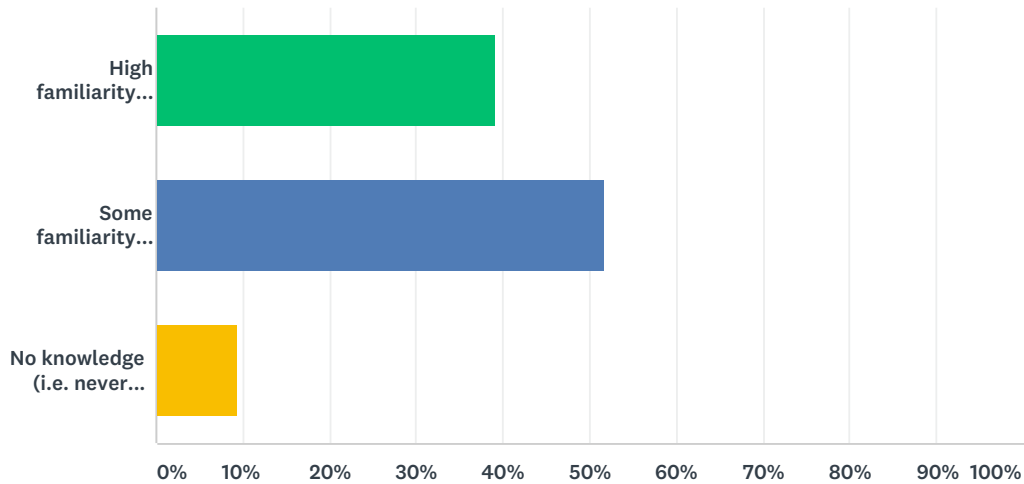
Answered: 2,684 Skipped: 256



ANSWER CHOICES	RESPONSES	
Maintaining and repairing existing roads, highways and freeways	64.42%	1,729
Expanding roads, highways, and freeways	28.35%	761
Building more sidewalks, bike lanes, and paths	29.17%	783
Expanding public transportation, including trains, buses, and on-demand options	79.84%	2,143
Develop a passenger transportation service that makes use of self-driving vehicles	21.57%	579
Promoting carshare, vanpooling, and carpooling	22.95%	616
Building dedicated bus lanes and transit signal priority	15.31%	411
Total Respondents: 2,684		

Q10 County Connection operates 25 weekday routes, 7 express routes, and 19 school routes in your community. Before receiving this survey, what was your familiarity with County Connection?

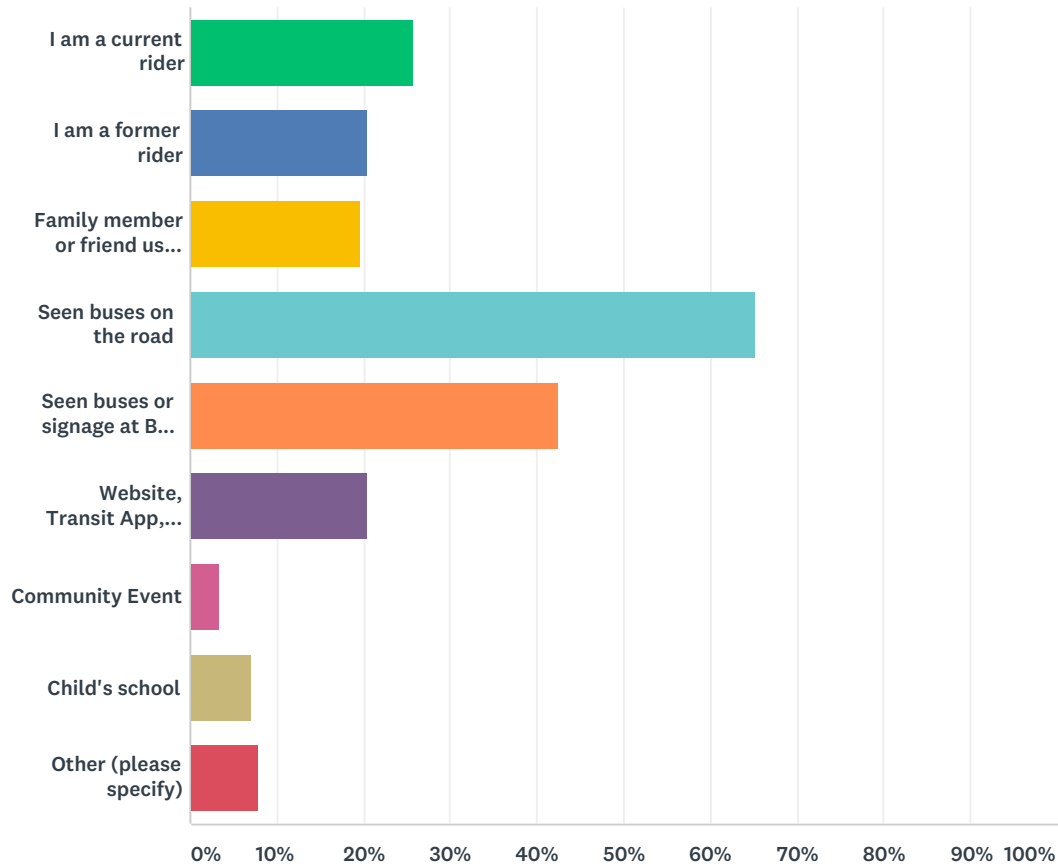
Answered: 2,684 Skipped: 256



ANSWER CHOICES	RESPONSES	
High familiarity (i.e. know of one or more bus routes and how to ride)	39.05%	1,048
Some familiarity (i.e. aware of the name and have seen buses on the road or at BART)	51.60%	1,385
No knowledge (i.e. never heard of or ridden County Connection)	9.35%	251
TOTAL		2,684

Q11 How did you hear about County Connection? (select all that apply)

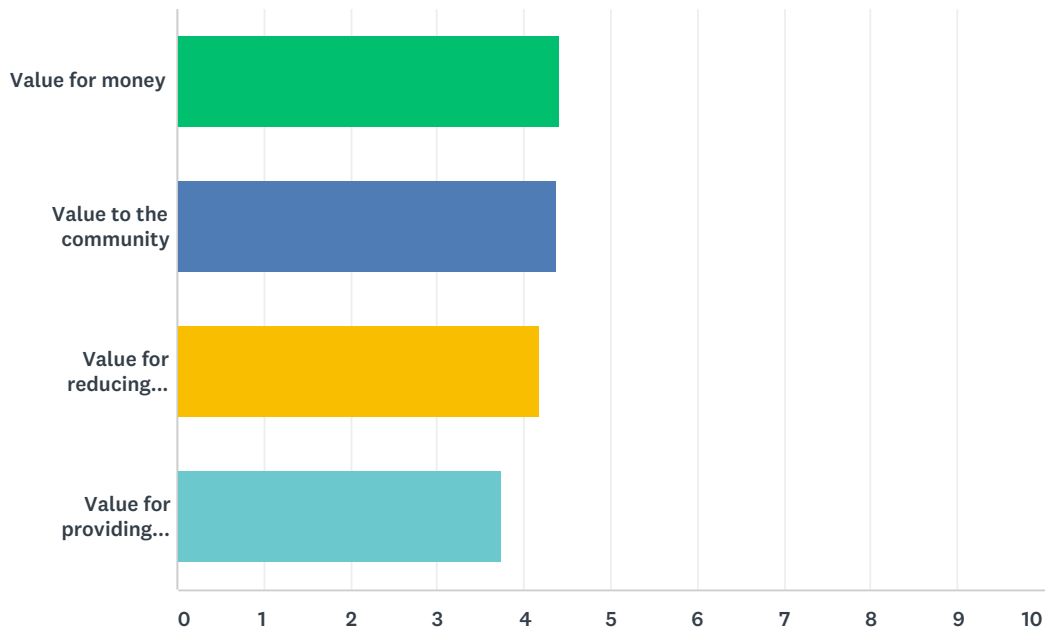
Answered: 2,391 Skipped: 549



ANSWER CHOICES	RESPONSES	
I am a current rider	25.76%	616
I am a former rider	20.45%	489
Family member or friend uses County Connection	19.57%	468
Seen buses on the road	65.20%	1,559
Seen buses or signage at BART stations	42.37%	1,013
Website, Transit App, Google Maps, or another online source	20.58%	492
Community Event	3.35%	80
Child's school	7.11%	170
Other (please specify)	8.03%	192
Total Respondents: 2,391		

Q12 How would you rate the value of County Connection? Rate each statement on a scale of 1-5, where 5 is highest value.

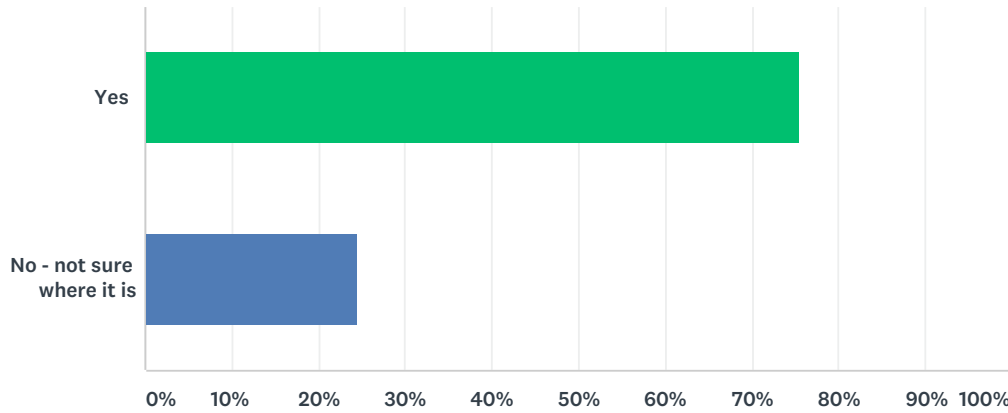
Answered: 2,397 Skipped: 543



	1 - LOW VALUE	2	3	4	5 - HIGH VALUE	NO OPINION	TOTAL	WEIGHTED AVERAGE
Value for money	2.75% 66	5.13% 123	14.39% 345	22.49% 539	36.71% 880	18.52% 444	2,397	4.41
Value to the community	3.09% 74	4.67% 112	12.56% 301	19.23% 461	52.23% 1,252	8.22% 197	2,397	4.38
Value for reducing traffic congestion	4.84% 116	6.59% 158	14.89% 357	20.53% 492	45.39% 1,088	7.76% 186	2,397	4.18
Value for providing alternate options to driving myself	16.73% 401	8.80% 211	13.60% 326	14.94% 358	35.79% 858	10.14% 243	2,397	3.75

Q13 Do you know where the County Connection bus stop closest to your home is?

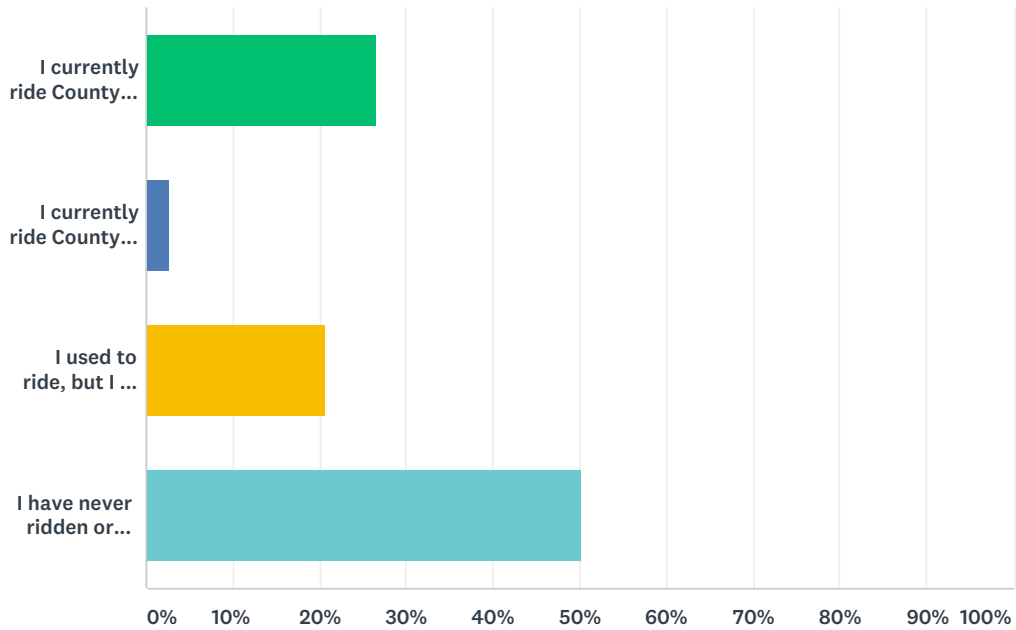
Answered: 2,397 Skipped: 543



ANSWER CHOICES	RESPONSES	
Yes	75.43%	1,808
No - not sure where it is	24.57%	589
TOTAL		2,397

Q14 Which of the following best describes you?

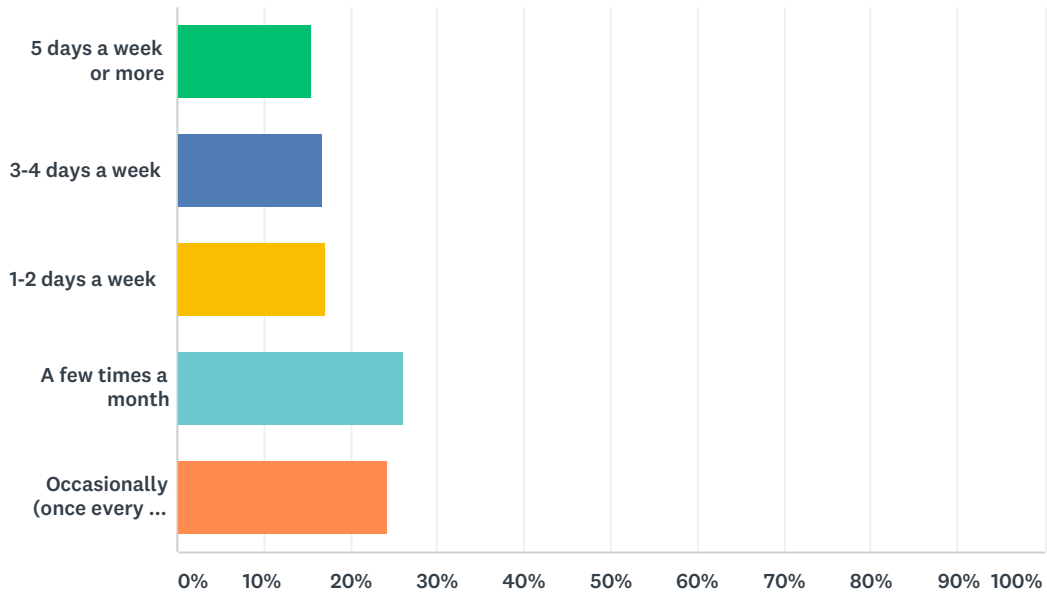
Answered: 2,397 Skipped: 543



ANSWER CHOICES	RESPONSES	
I currently ride County Connection buses regularly or occasionally	26.57%	637
I currently ride County Connection LINK paratransit regularly or occasionally	2.67%	64
I used to ride, but I no longer ride County Connection buses	20.61%	494
I have never ridden or rarely ride County Connection buses	50.15%	1,202
TOTAL		2,397

Q15 How often do you ride County Connection?

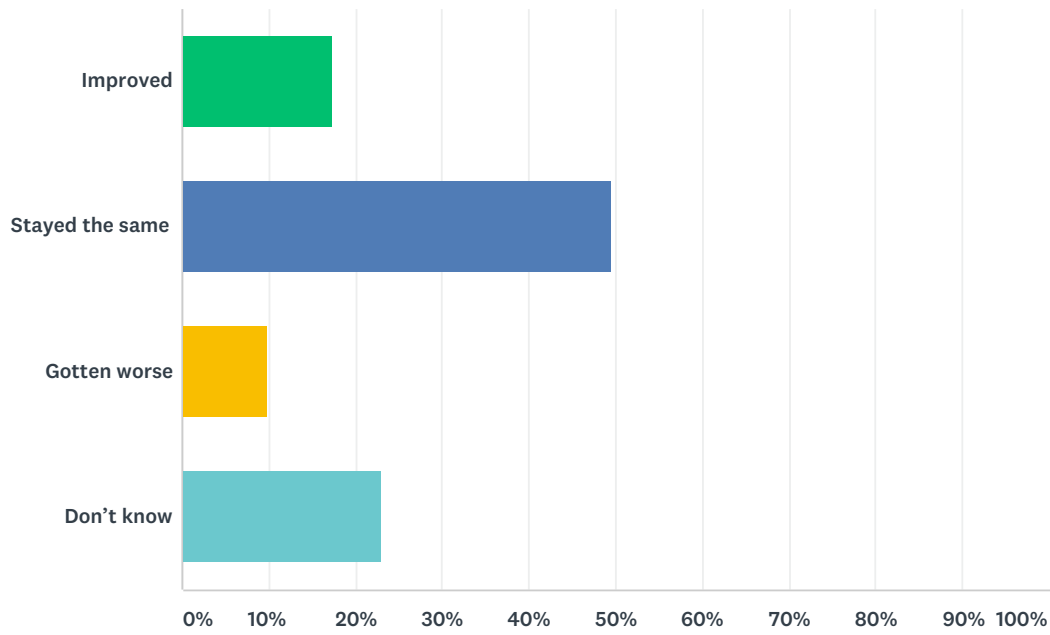
Answered: 636 Skipped: 2,304



ANSWER CHOICES	RESPONSES	
5 days a week or more	15.57%	99
3-4 days a week	16.82%	107
1-2 days a week	17.14%	109
A few times a month	26.10%	166
Occasionally (once every few months)	24.37%	155
TOTAL		636

Q16 Over the last three years, would you say County Connection service has...

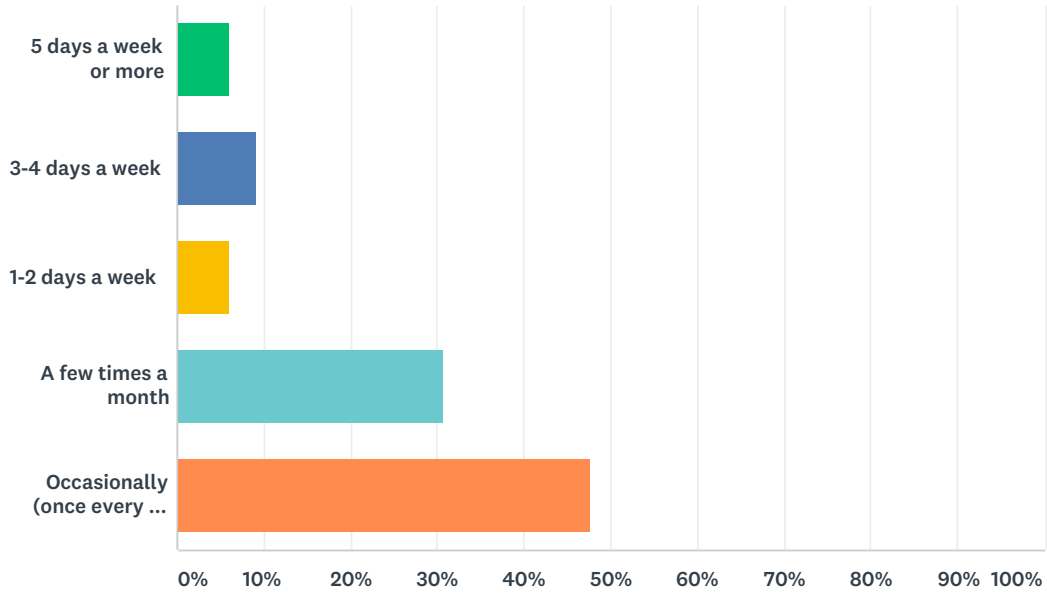
Answered: 636 Skipped: 2,304



ANSWER CHOICES	RESPONSES	
Improved	17.45%	111
Stayed the same	49.69%	316
Gotten worse	9.91%	63
Don't know	22.96%	146
TOTAL		636

Q17 How often do you ride County Connection LINK Paratransit?

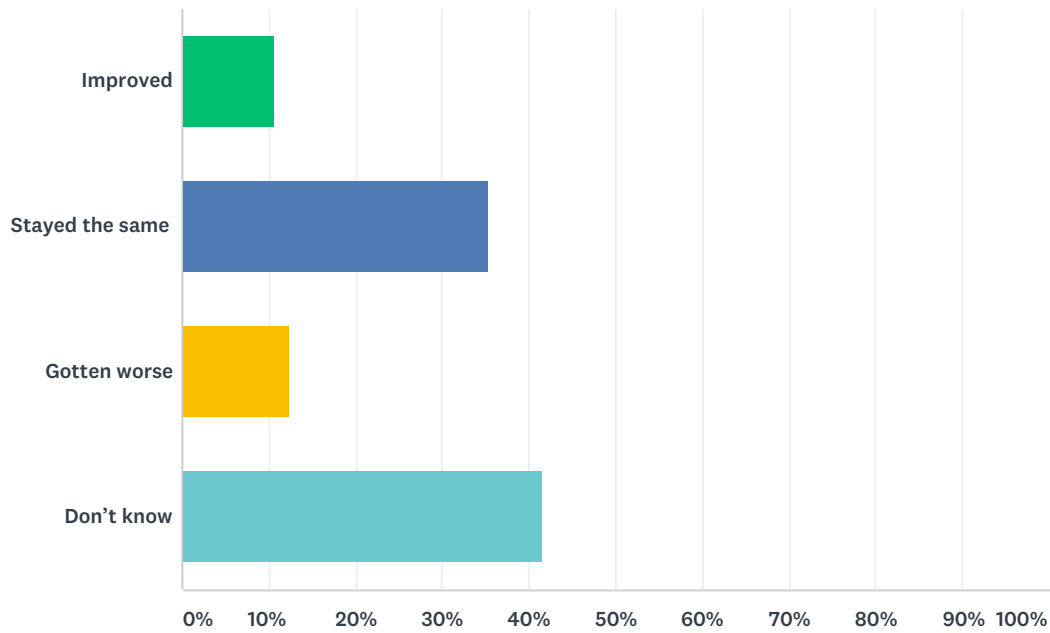
Answered: 65 Skipped: 2,875



ANSWER CHOICES	RESPONSES	
5 days a week or more	6.15%	4
3-4 days a week	9.23%	6
1-2 days a week	6.15%	4
A few times a month	30.77%	20
Occasionally (once every few months)	47.69%	31
TOTAL		65

Q18 Over the last three years, would you say County Connection LINK Paratransit service has...

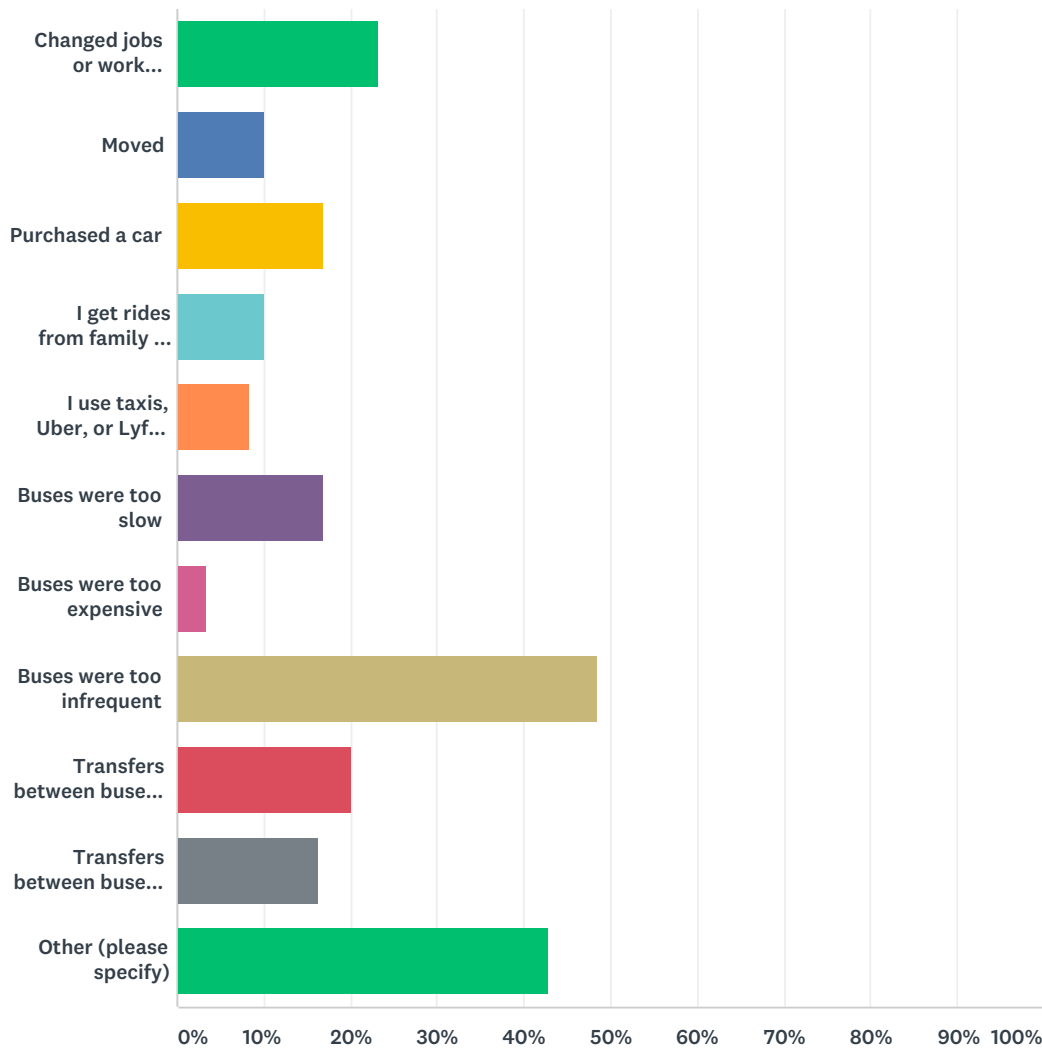
Answered: 65 Skipped: 2,875



ANSWER CHOICES	RESPONSES
Improved	10.77% 7
Stayed the same	35.38% 23
Gotten worse	12.31% 8
Don't know	41.54% 27
TOTAL	65

Q19 You indicated you used to ride County Connection. Why do you no longer use County Connection? (select all that apply)

Answered: 493 Skipped: 2,447

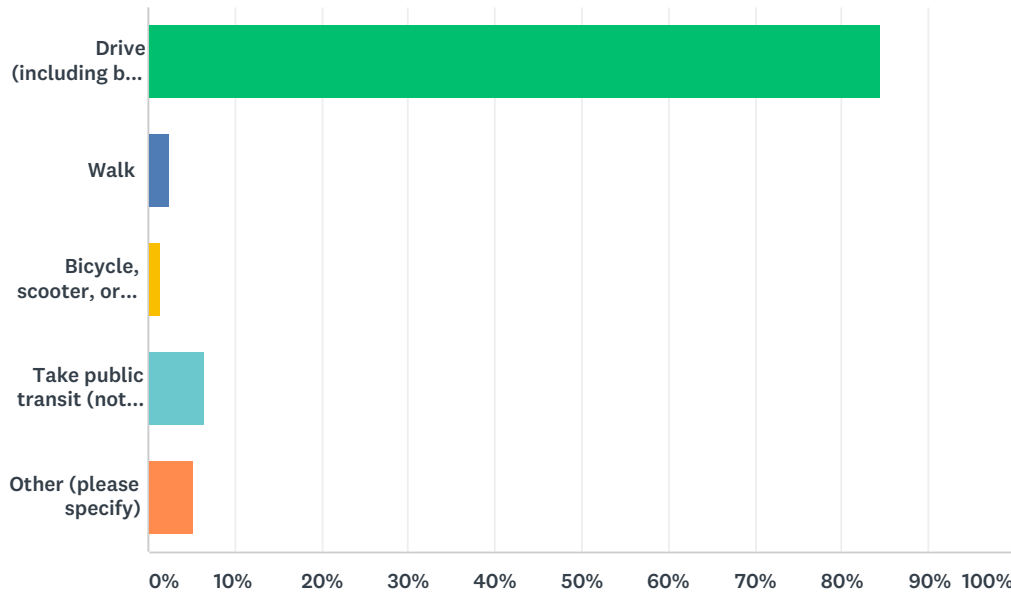


ANSWER CHOICES	RESPONSES	
Changed jobs or work location	23.12%	114
Moved	9.94%	49
Purchased a car	17.04%	84
I get rides from family or friends instead	9.94%	49
I use taxis, Uber, or Lyft instead	8.32%	41
Buses were too slow	17.04%	84
Buses were too expensive	3.45%	17
Buses were too infrequent	48.48%	239
Transfers between buses and BART took too much time	20.08%	99

Transfers between buses were challenging or took too much time	16.23%	80
Other (please specify)	42.80%	211
Total Respondents: 493		

Q20 For the trips you make on a daily basis, do you?

Answered: 1,451 Skipped: 1,489



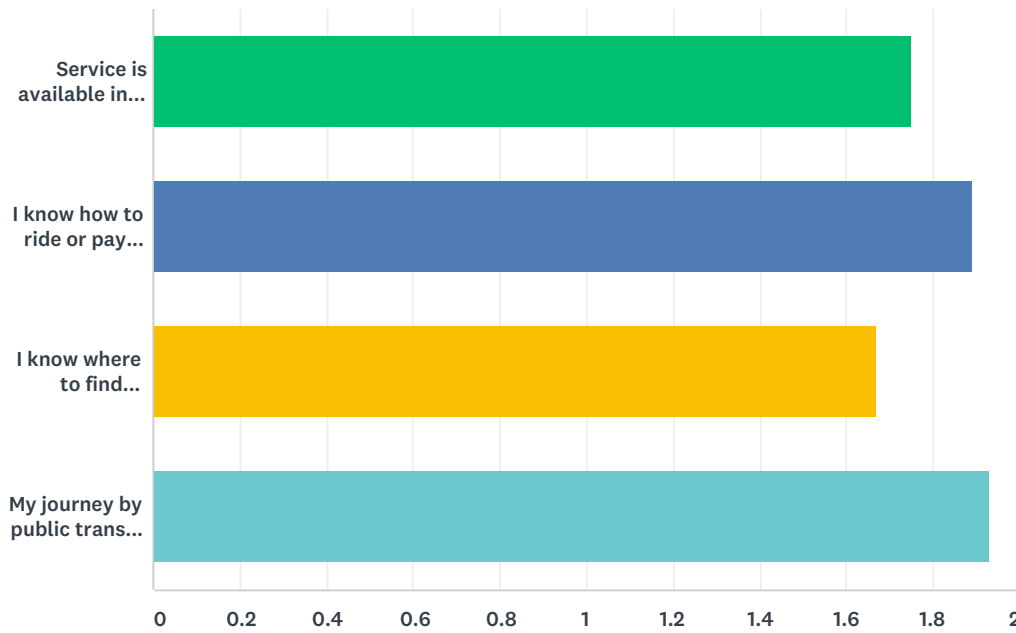
ANSWER CHOICES	RESPONSES	
Drive (including by car, motorcycle, carpool, Uber/Lyft, taxi, etc.)	84.42%	1,225
Walk	2.48%	36
Bicycle, scooter, or skateboard	1.38%	20
Take public transit (not County Connection)	6.55%	95
Other (please specify)	5.17%	75
TOTAL		1,451

Q21 Which public transit service/provider do you ride?

Answered: 89 Skipped: 2,851

Q22 Do you agree or disagree with the following statements regarding County Connection service?

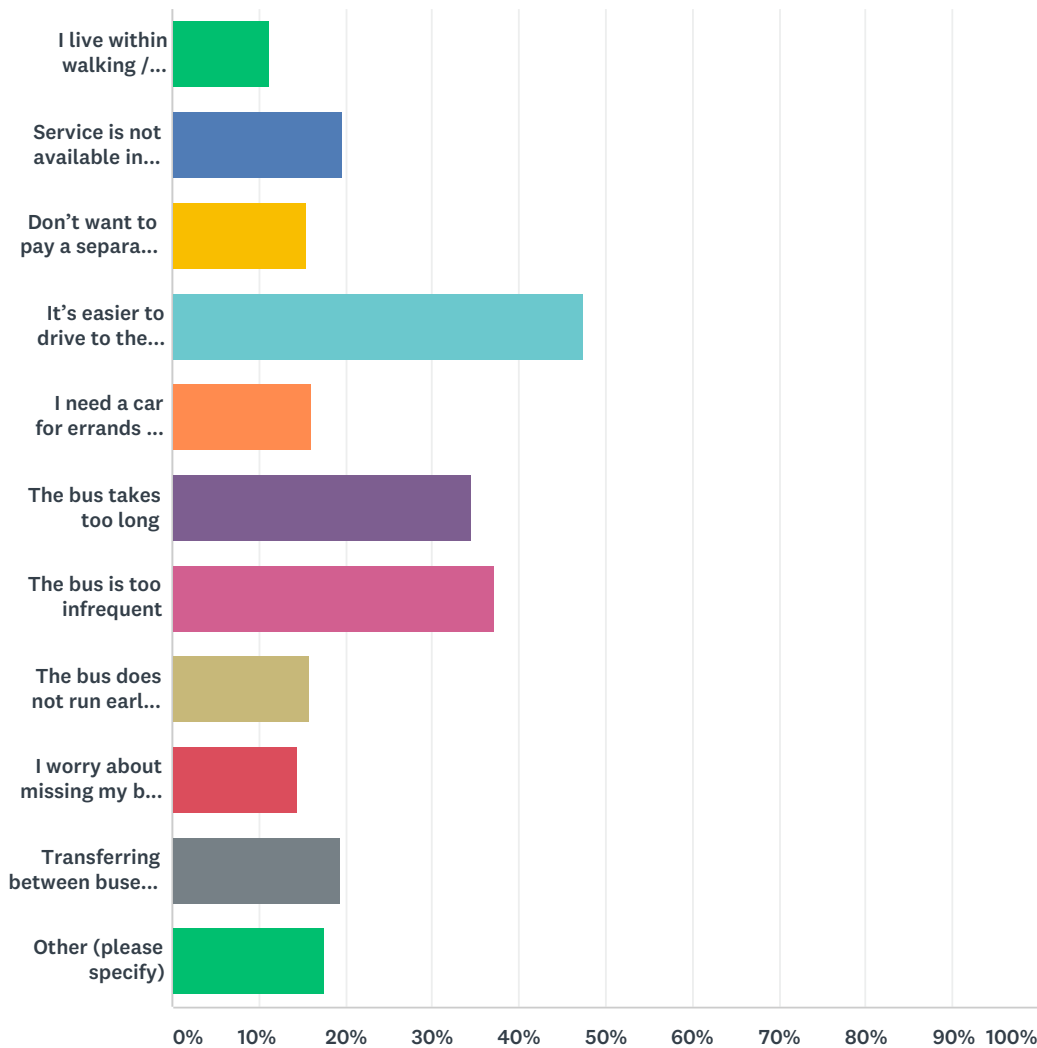
Answered: 1,383 Skipped: 1,557



	AGREE	DISAGREE	DON'T KNOW	TOTAL	WEIGHTED AVERAGE
Service is available in my area	53.00% 733	19.31% 267	27.69% 383	1,383	1.75
I know how to ride or pay fares	43.96% 608	23.28% 322	32.75% 453	1,383	1.89
I know where to find schedule and route information	57.92% 801	17.28% 239	24.80% 343	1,383	1.67
My journey by public transit would require multiple transfers	48.08% 665	10.99% 152	40.93% 566	1,383	1.93

Q23 If you ride BART, why do you choose not to use County Connection to get to BART? (select all that apply)

Answered: 1,240 Skipped: 1,700

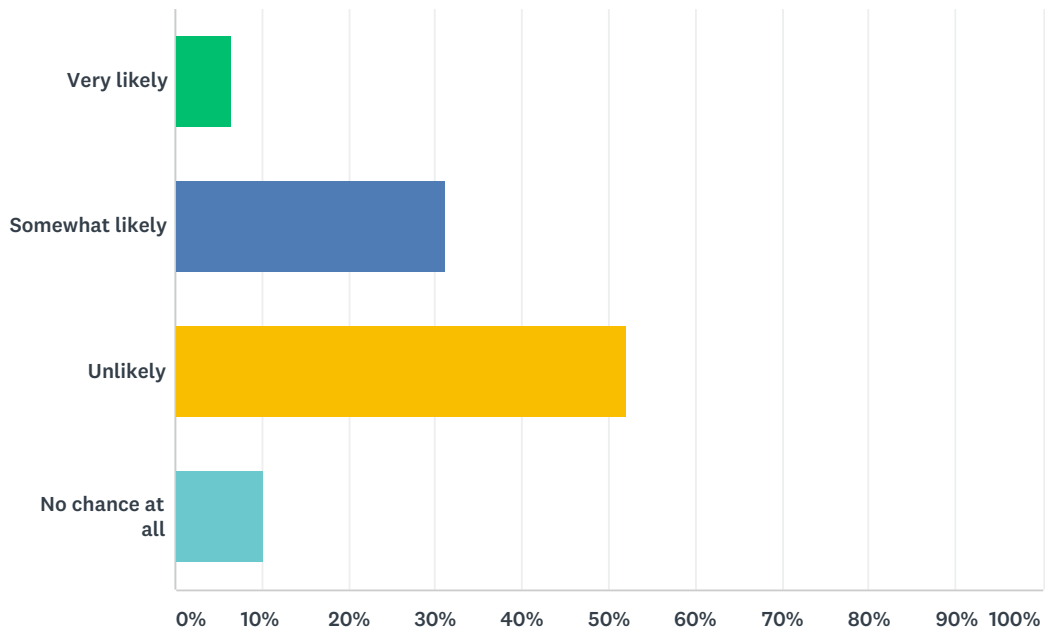


ANSWER CHOICES	RESPONSES	
I live within walking / cycling distance of BART	11.37%	141
Service is not available in my area	19.68%	244
Don't want to pay a separate bus fare when transferring to/from BART	15.40%	191
It's easier to drive to the station	47.58%	590
I need a car for errands or to pick up kids, family, etc.	16.21%	201
The bus takes too long	34.52%	428
The bus is too infrequent	37.34%	463
The bus does not run early or late enough	15.89%	197
I worry about missing my bus if BART is delayed	14.35%	178

Transferring between buses and BART is too time consuming	19.52%	242
Other (please specify)	17.58%	218
Total Respondents: 1,240		

Q24 How likely is it that you will use County Connection’s bus services in the future?

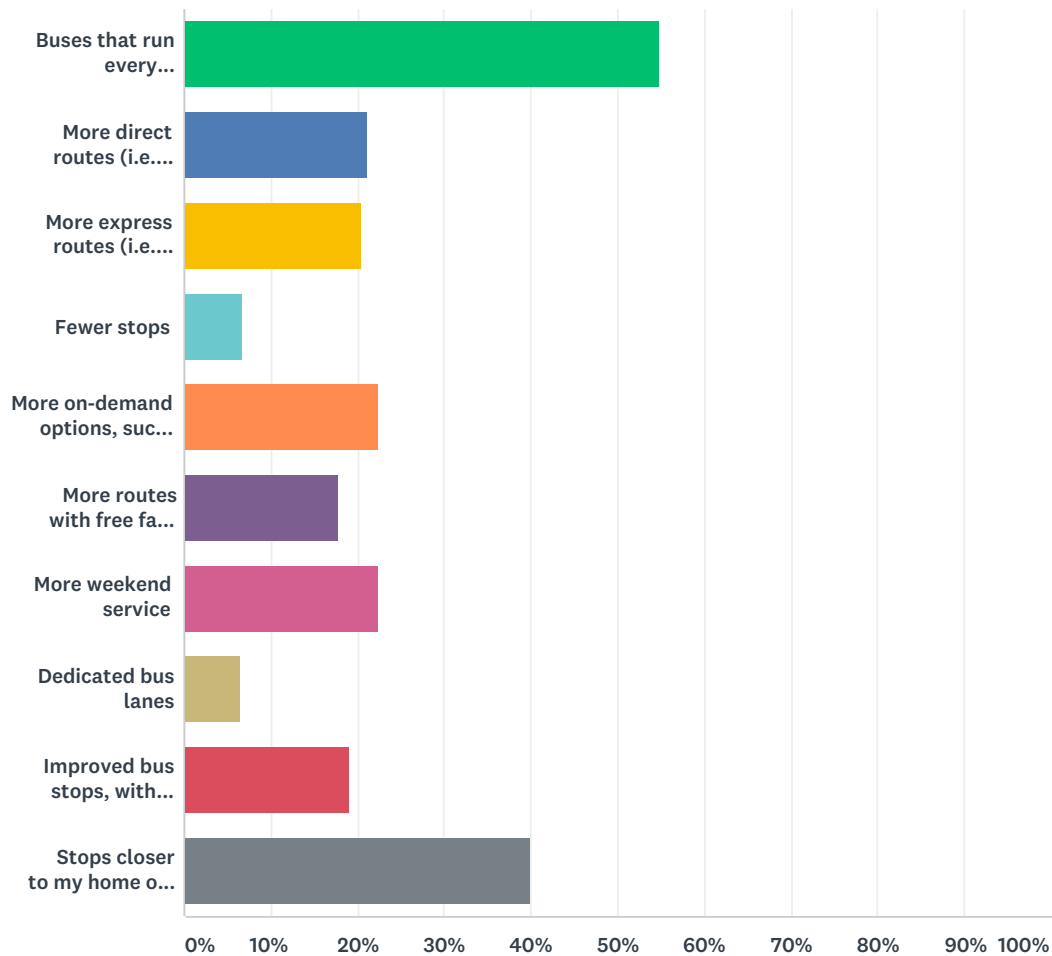
Answered: 1,383 Skipped: 1,557



ANSWER CHOICES	RESPONSES
Very likely	6.44% 89
Somewhat likely	31.16% 431
Unlikely	52.06% 720
No chance at all	10.34% 143
TOTAL	1,383

Q25 Select the investment priorities for County Connection that would make you more likely to ride the bus or ride it more often? (Select up to 3)

Answered: 2,559 Skipped: 381



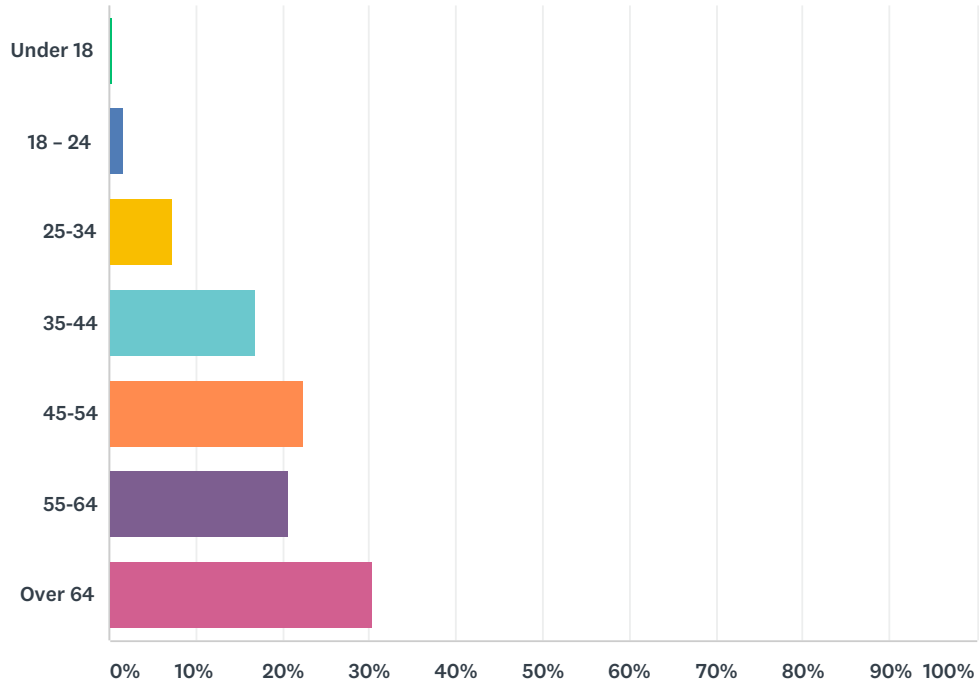
ANSWER CHOICES	RESPONSES	
Buses that run every 15-minutes to connect you to/from BART	54.83%	1,403
More direct routes (i.e. fewer turns and travel on major roadways)	21.22%	543
More express routes (i.e. those that travel long distances without stopping)	20.59%	527
Fewer stops	6.68%	171
More on-demand options, such as partnerships with Uber or Lyft to provide connections to BART	22.35%	572
More routes with free fares to all customers	17.78%	455
More weekend service	22.47%	575
Dedicated bus lanes	6.41%	164
Improved bus stops, with amenities such as shelters, seating, lighting, or other amenities	18.95%	485
Stops closer to my home or destination	40.05%	1,025
Total Respondents: 2,559		

Q26 Are there any other improvements or investment priorities you recommend for County Connection?

Answered: 1,107 Skipped: 1,833

Q27 What is your age?

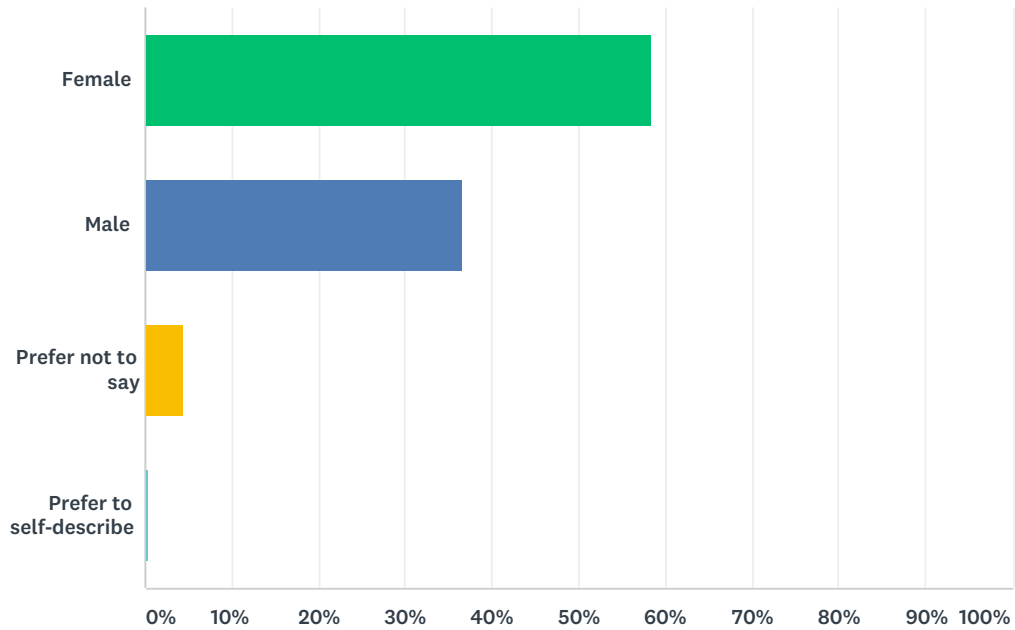
Answered: 2,542 Skipped: 398



ANSWER CHOICES	RESPONSES
Under 18	0.51% 13
18 - 24	1.73% 44
25-34	7.28% 185
35-44	17.03% 433
45-54	22.42% 570
55-64	20.69% 526
Over 64	30.33% 771
TOTAL	2,542

Q28 What is your gender?

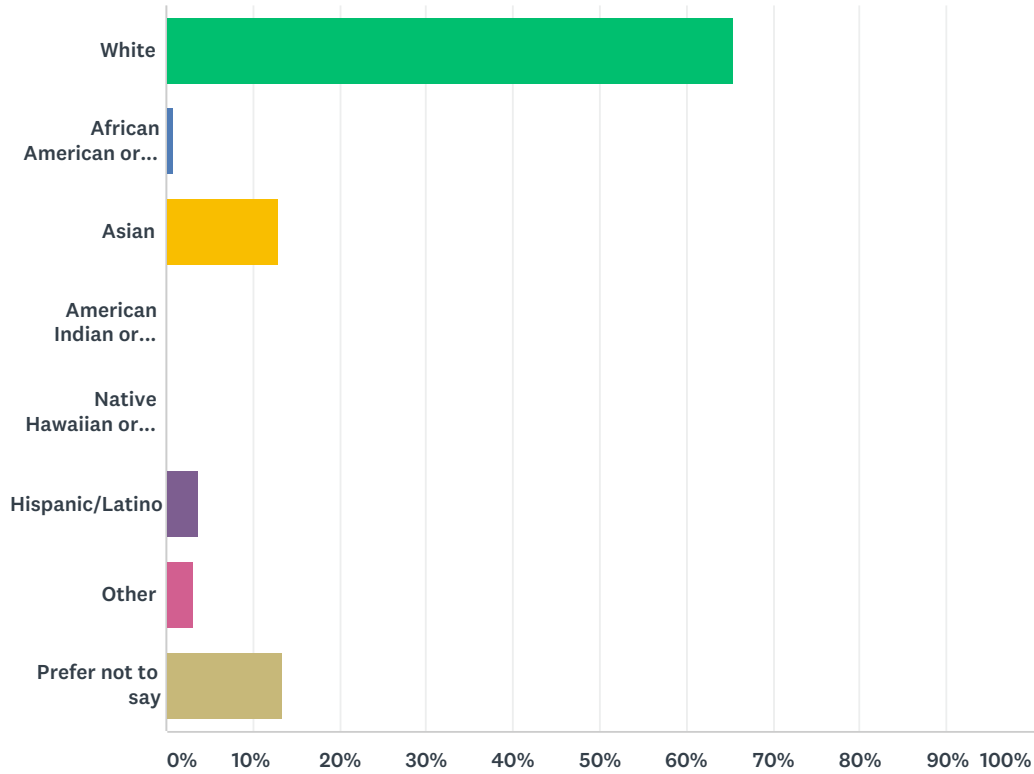
Answered: 2,542 Skipped: 398



ANSWER CHOICES	RESPONSES
Female	58.46% 1,486
Male	36.70% 933
Prefer not to say	4.33% 110
Prefer to self-describe	0.51% 13
TOTAL	2,542

Q29 Which of the following best describes your race? Are you:

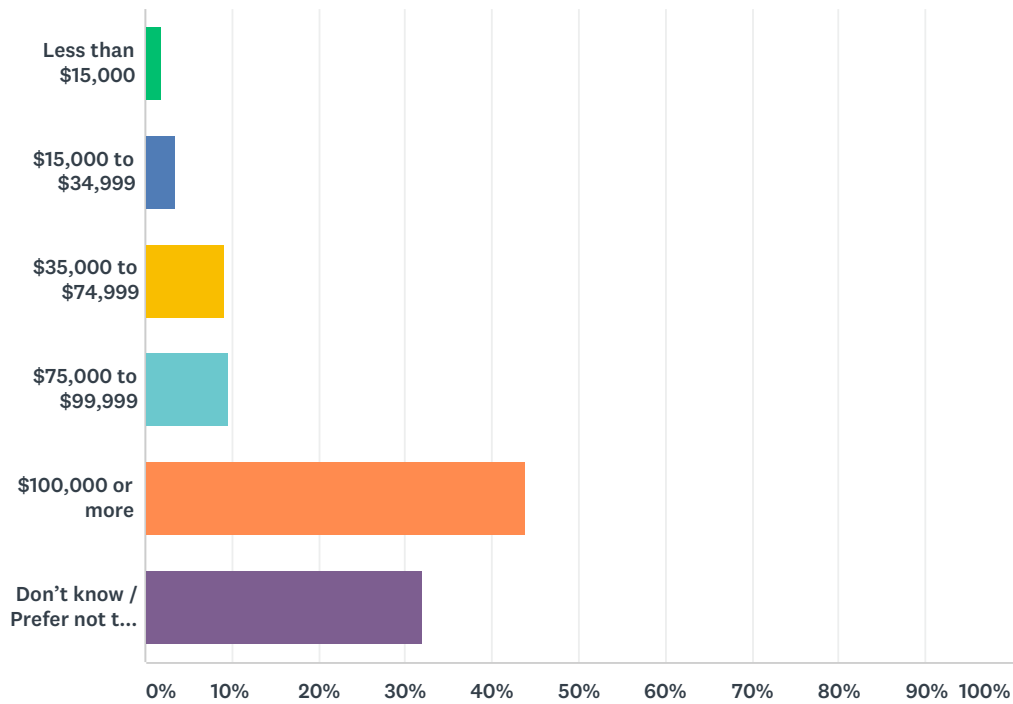
Answered: 2,542 Skipped: 398



ANSWER CHOICES	RESPONSES	
White	65.50%	1,665
African American or Black	0.79%	20
Asian	12.94%	329
American Indian or Alaskan Native	0.20%	5
Native Hawaiian or other Pacific Islander	0.28%	7
Hispanic/Latino	3.74%	95
Other	3.15%	80
Prefer not to say	13.41%	341
TOTAL		2,542

Q30 Last year, in 2016, what was your total household income from all sources, before taxes?

Answered: 2,542 Skipped: 398



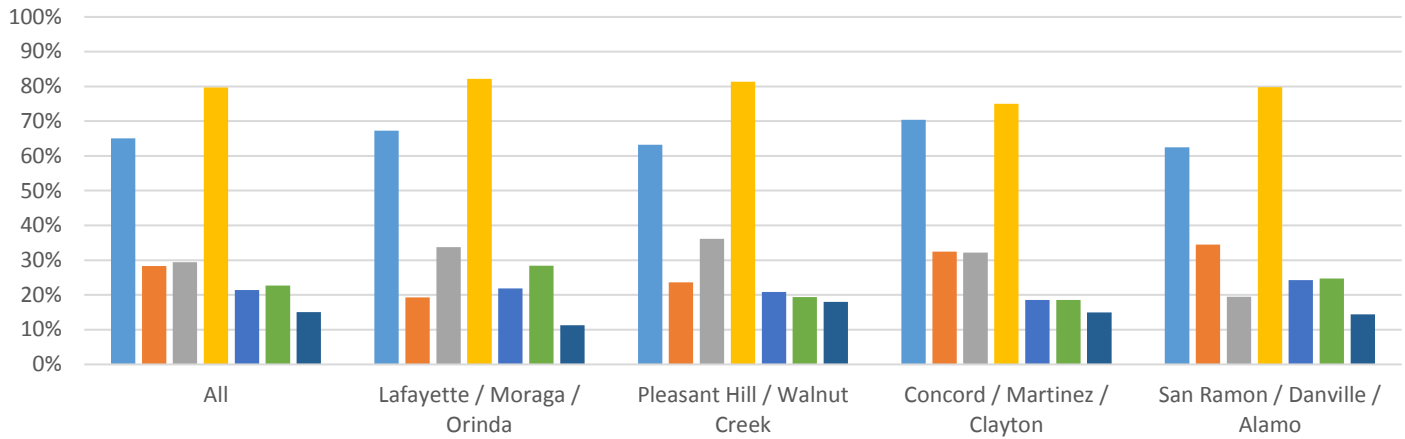
ANSWER CHOICES	RESPONSES	
Less than \$15,000	1.93%	49
\$15,000 to \$34,999	3.54%	90
\$35,000 to \$74,999	9.17%	233
\$75,000 to \$99,999	9.56%	243
\$100,000 or more	43.90%	1,116
Don't know / Prefer not to say	31.90%	811
TOTAL		2,542

Appendix D **SELECT CROSS-TABULATIONS**

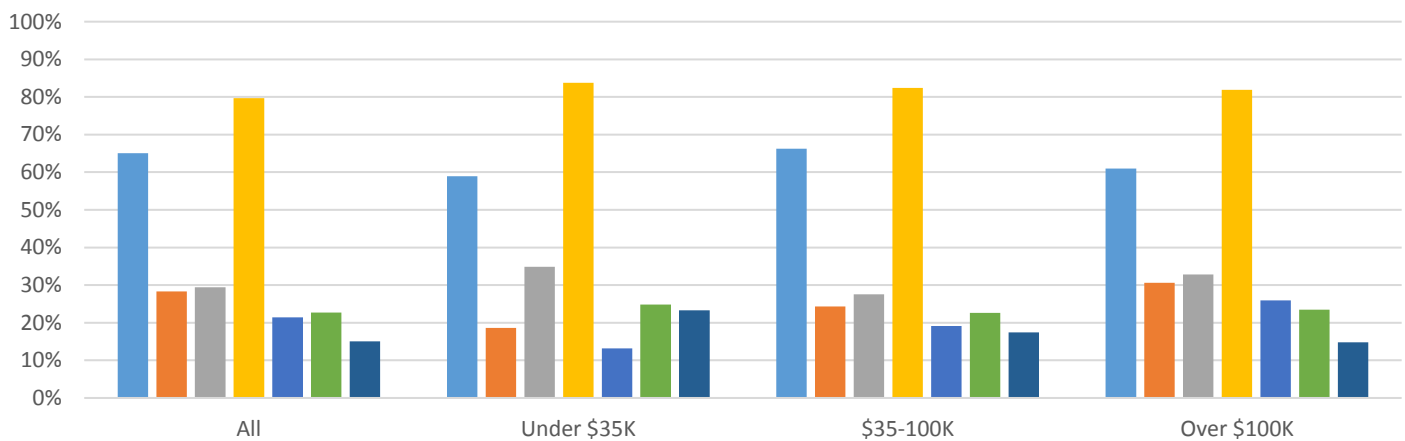
2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Appendix D – Select Cross-Tabulations

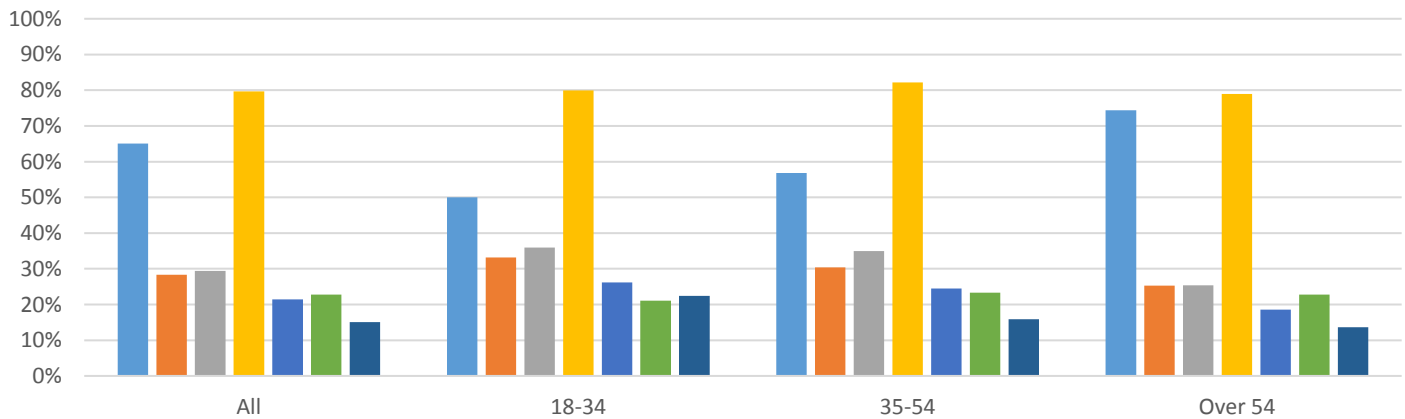
Q9 - Top Priorities for Future Transportation Investment (by area)



Q9 - Top Priorities for Future Transportation Investment (by income)



Q9 - Top Priorities for Future Transportation Investment (by age)

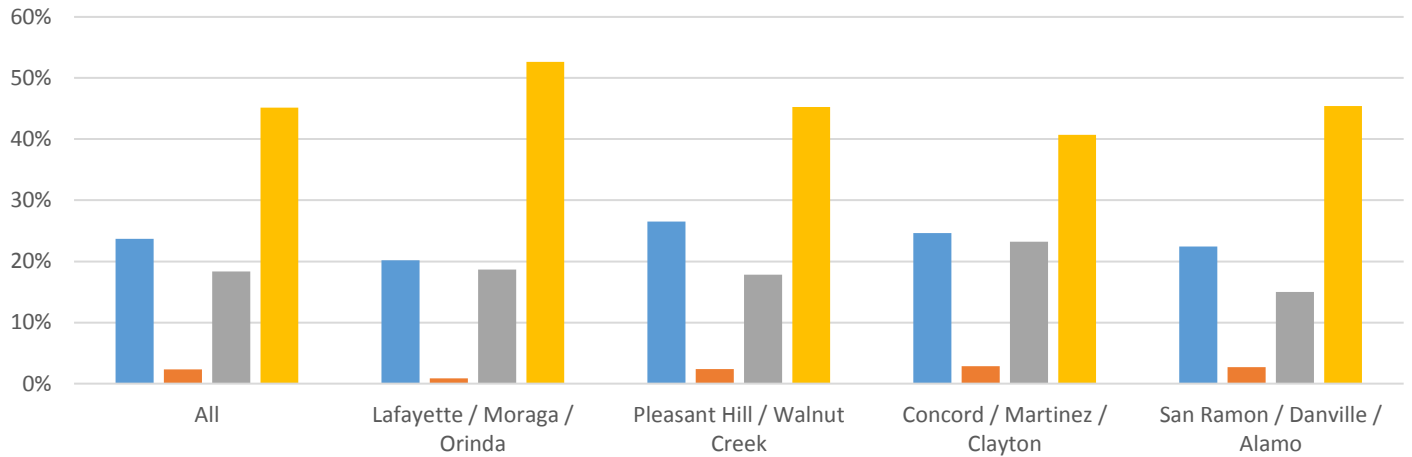


- Maintaining and repairing existing roads, highways and freeways
- Expanding roads, highways, and freeways
- Building more sidewalks, bike lanes, and paths
- Expanding public transportation, including trains, buses, and on-demand options
- Develop a passenger transportation service that makes use of self-driving vehicles
- Promoting carshare, vanpooling, and carpooling
- Building dedicated bus lanes and transit signal priority

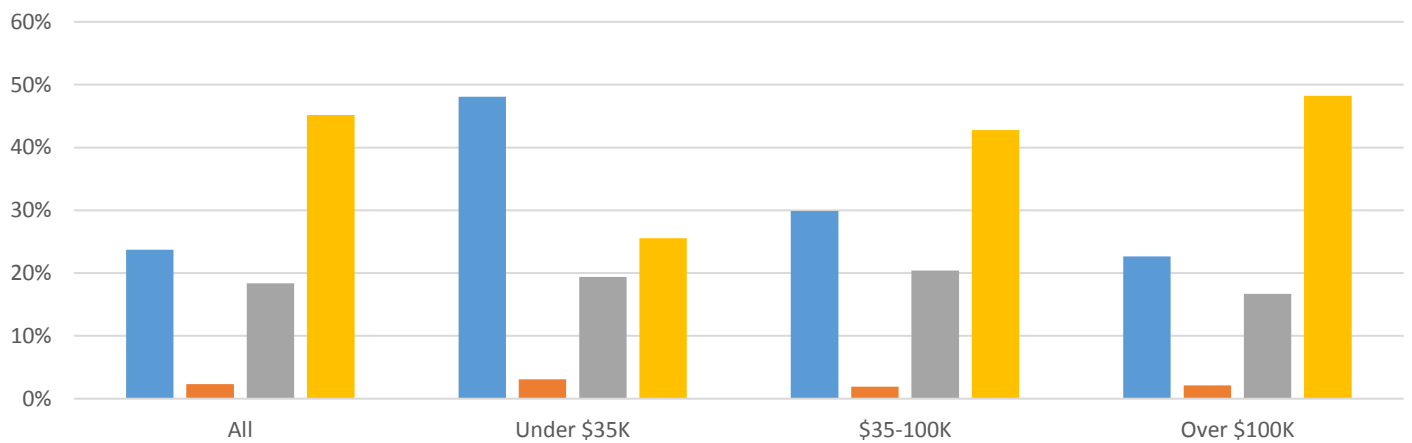
2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Appendix D – Select Cross-Tabulations

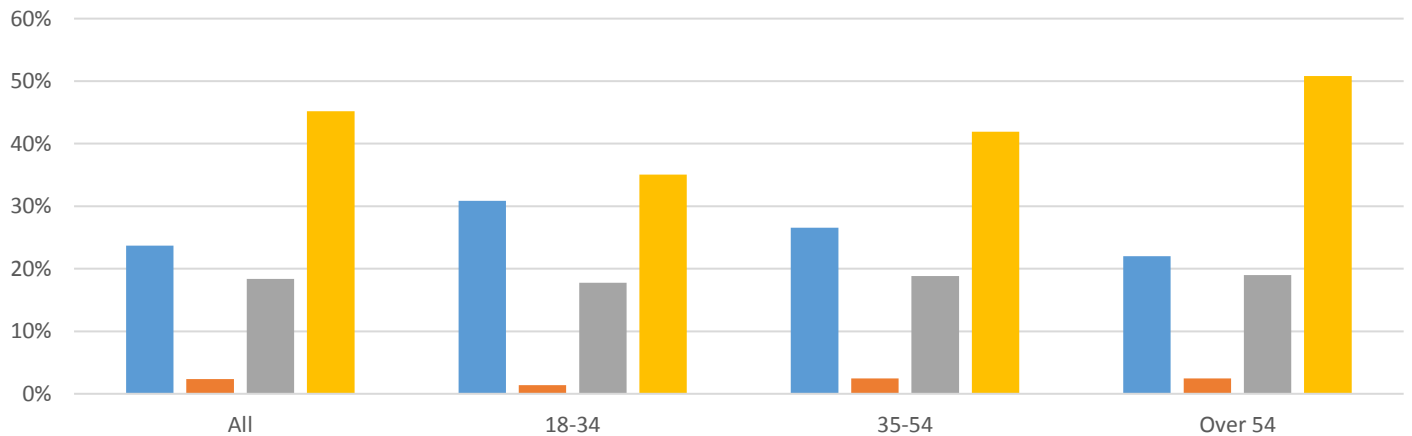
Q14 - Riders/Fomer Riders/Non-Riders (by area)



Q14 - Riders/Fomer Riders/Non-Riders (by income)



Q14 - Riders/Fomer Riders/Non-Riders (by age)

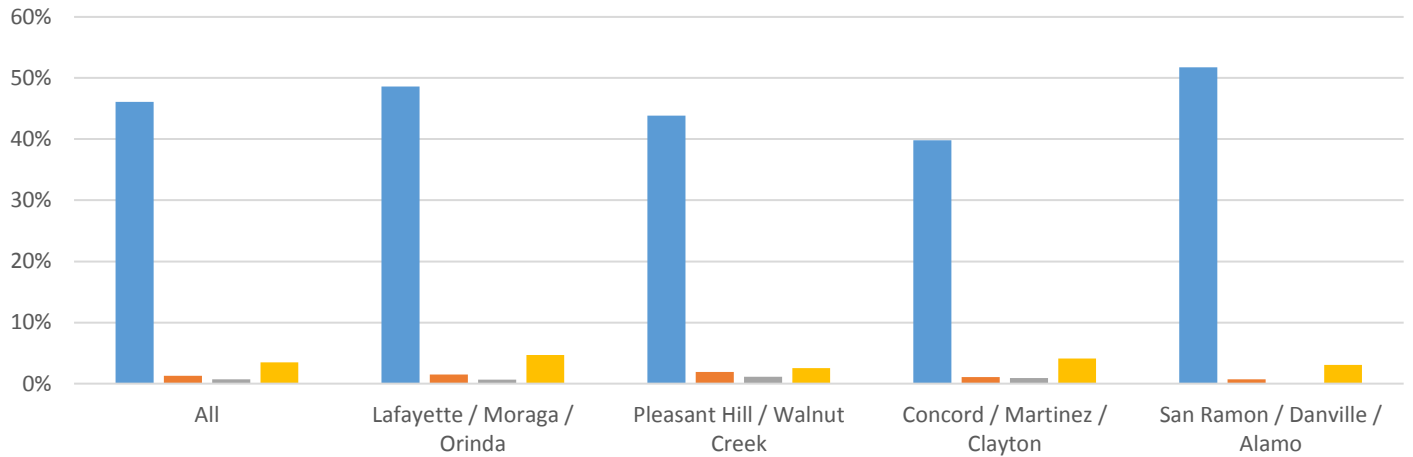


■ I currently ride County Connection buses regularly or occasionally
 ■ I currently ride LINK
 ■ I used to ride, but I no longer ride County Connection buses
 ■ I have never ridden or rarely ride County Connection buses

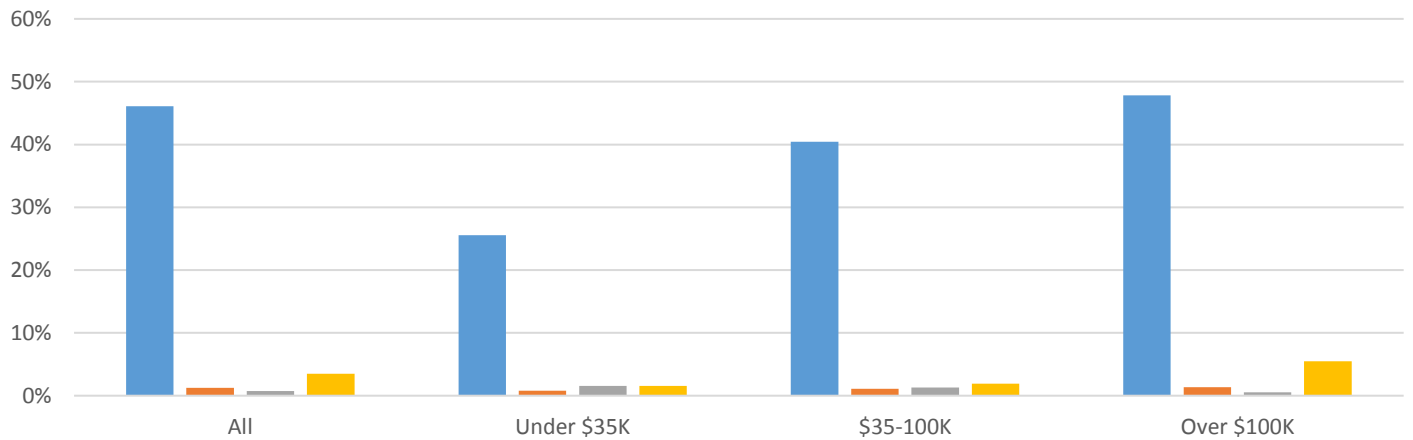
2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Appendix D – Select Cross-Tabulations

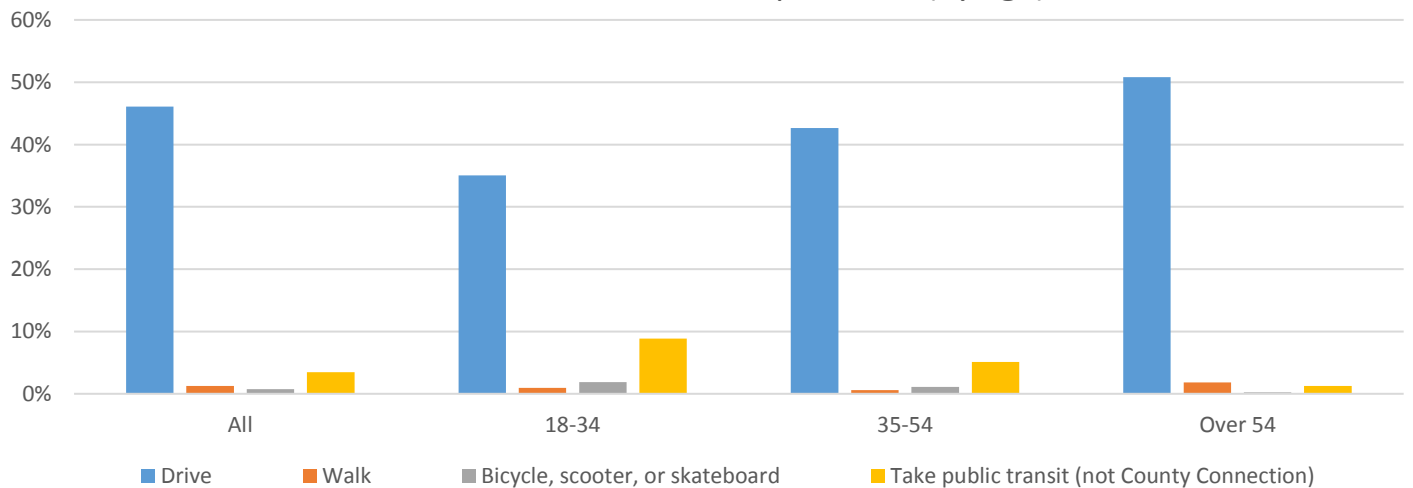
Q20 - Main Mode of Transportation (by area)



Q20 - Main Mode of Transportation (by income)



Q20 - Main Mode of Transportation (by age)

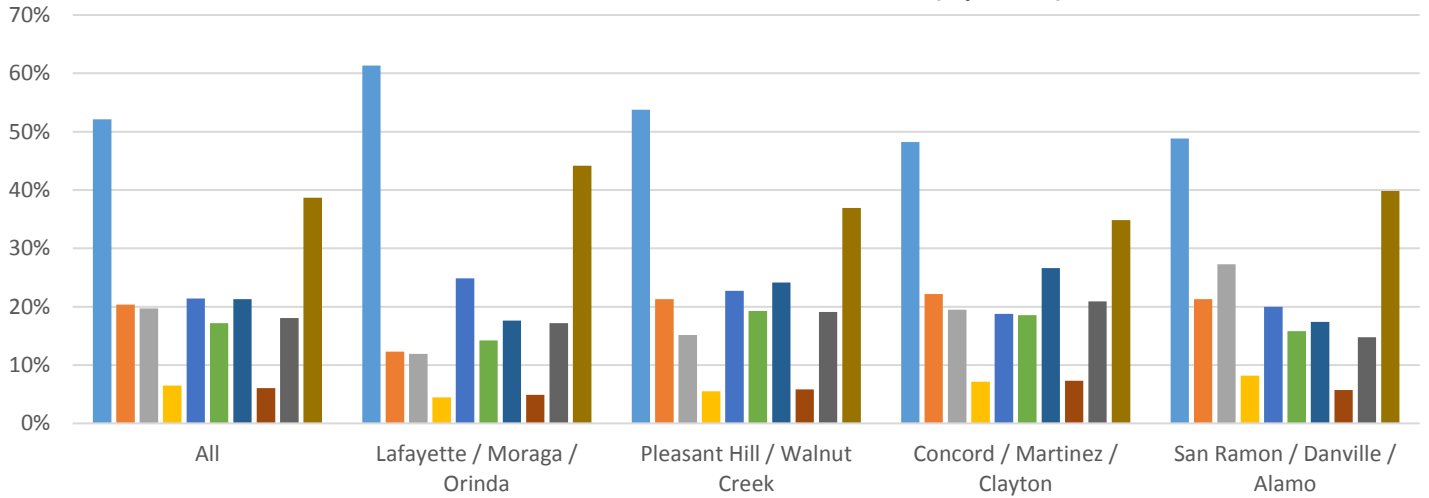


■ Drive
 ■ Walk
 ■ Bicycle, scooter, or skateboard
 ■ Take public transit (not County Connection)

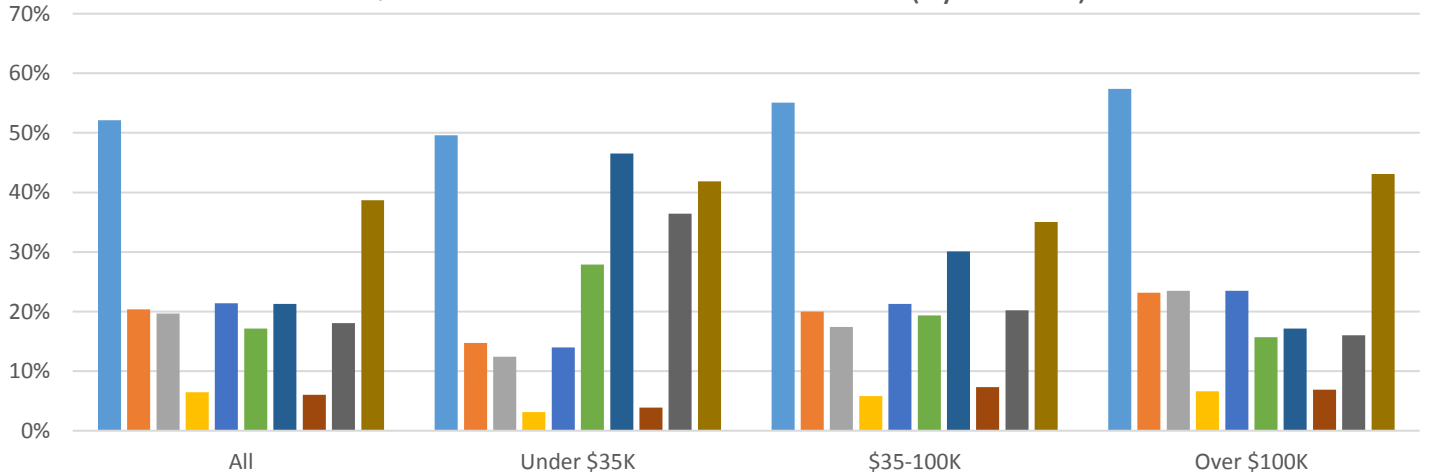
2017 FIXED ROUTE TRANSIT COMMUNITY SURVEY

Appendix D – Select Cross-Tabulations

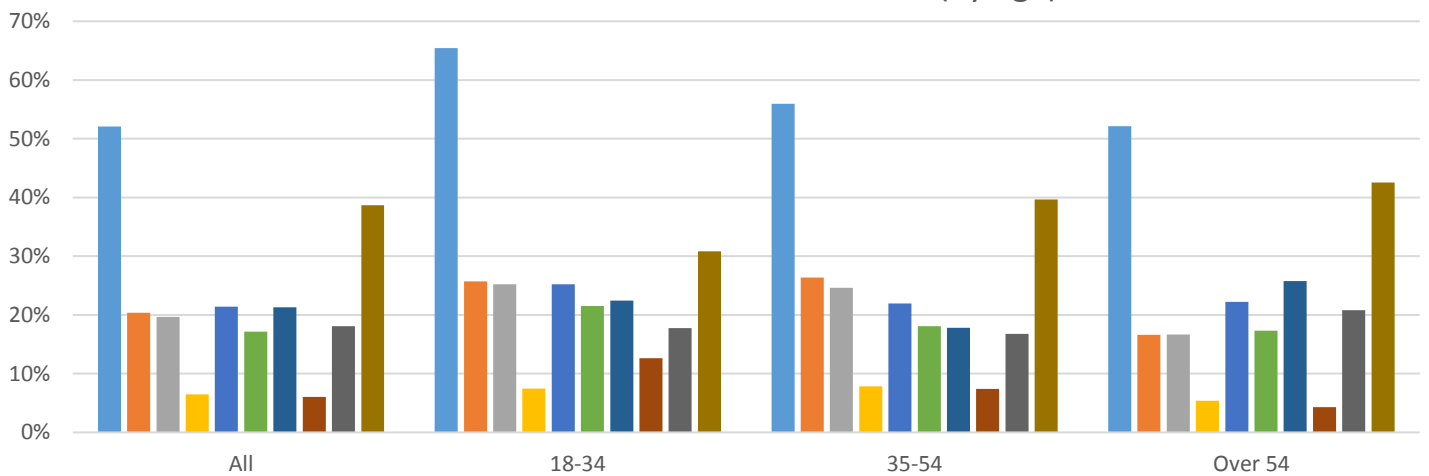
Q25 - Preferred Investment Priorities (by area)



Q25 - Preferred Investment Priorities (by income)



Q25 - Preferred Investment Priorities (by age)



- Buses that run every 15-minutes
 - More direct routes
 - Fewer stops
 - More weekend service
- More on-demand options
 - Dedicated bus lanes
- More express routes
 - More routes with free fares
 - Improved bus stops