



Valley Metro Ridership Recovery Topline Report

Summary of Findings

Research Objectives

Research Goal:

Valley Metro commissioned WestGroup Research to conduct an online survey of Metro-Phoenix residents who have used public transit in the area within the past year.

Research Objectives:

The purpose of the survey to understand the impact of the COVID-19 pandemic on perceptions of public transit overall, personal use of public transit, and what can be done to encourage riders to return to pre-COVID usage levels.

Research Methodology

Methodology: Quantitative

One (1) online survey with 1,494 participants in total: 840 Transit Independent Riders, 562 Transit Dependent Riders, 92 Non-grouped participants. The responses were collected between June 15 and June 30, 2020.

The Ridership Recovery study used an opt-in approach to recruit participants for the survey – invitations either came from WestGroup, Valley Metro, or invitations to participate were posted to social media by both of these organizations as well as various Valley Metro partners. The goal was to encourage response from as many riders/former riders as possible, understanding that the responses would not necessarily mirror the overall demographic attributes of Valley Metro ridership overall.

Analysis:

The data is broken down by transit independent riders and transit dependent riders. This breakdown is defined by the number of vehicles owned and the possession of a driver's license.

- Transit Independent Riders: Have a driver's license AND own at least one vehicle in HH
- Transit Dependent Riders: Do not have driver's license OR have zero vehicles in HH

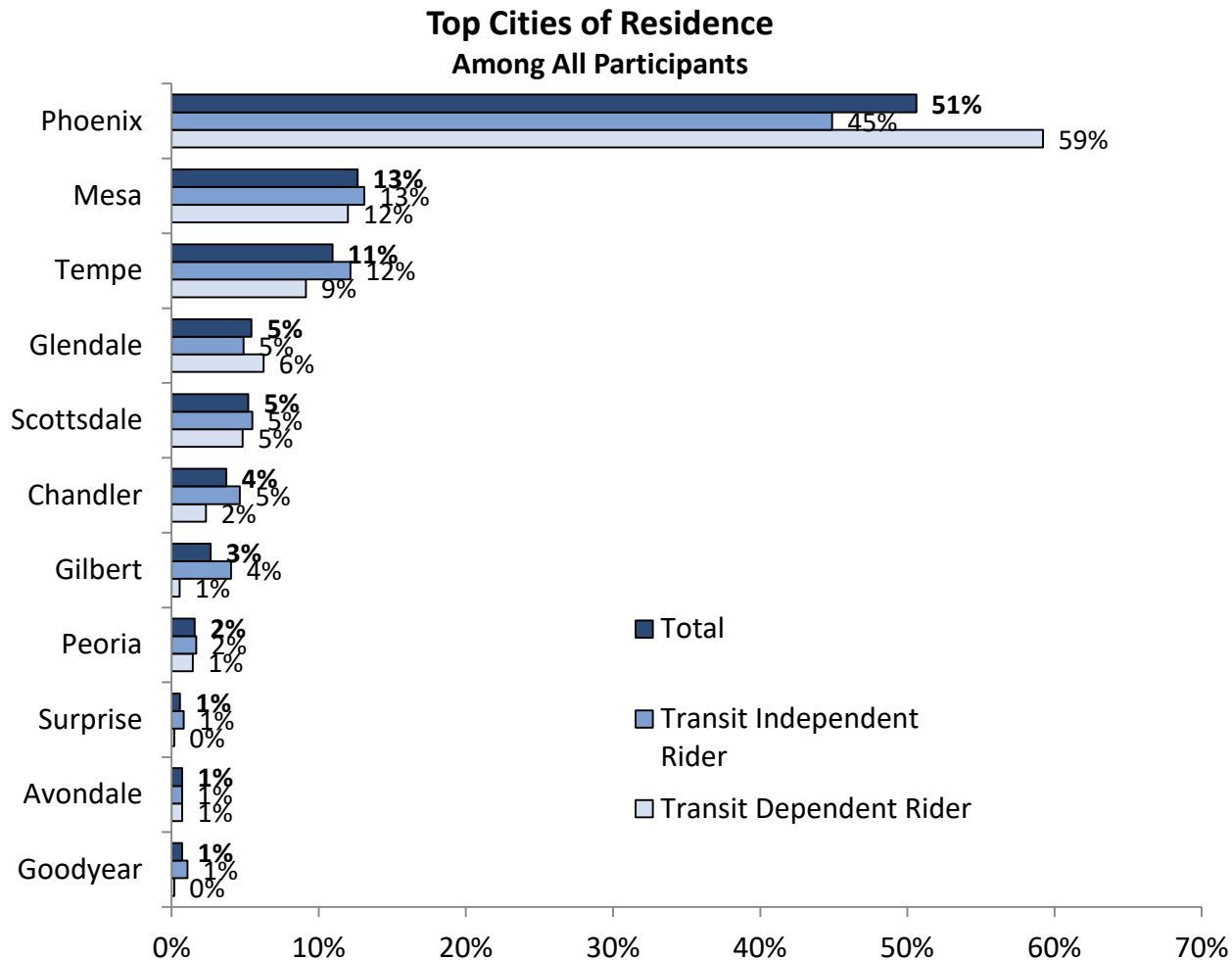
Demographics Summary

More than one-half of survey respondents were female (55%). While two-thirds of respondents were white, one-third were of a minority ethnicity with Hispanics accounting for 18%. Each age group was well represented. Overall 30% reported annual household incomes of under \$30,000, but as might be expected, Transit Dependent Riders were significantly more likely to report this lower income category (53% vs. 14% of Transit Independent Riders) and Transit Independent Riders were significantly more likely to earn more than \$75,000 (31% vs. 3%).

Demographics	Total n=1401	Transit Independ ent Riders n=840	Transit Dependent Riders n=561	Demographics	Total n=1400	Transit Independ ent Riders n=840	Transit Dependent Riders n=560
Gender				Age			
Female	55%	55%	55%	18-34	24%	23%	25%
Male	43%	43%	43%	35-54	41%	41%	43%
Other	2%	2%	2%	55 or older	33%	34%	29%
Ethnicity				Annual Household Income			
White	67%	69%	64%	Under \$30,000	30%	14%	53%
Hispanic/Latino	18%	18%	20%	\$30,000 -\$75,000	34%	39%	27%
Black/African American	8%	8%	8%	Over \$75,000	19%	31%	3%
American Indian/ Alaska Native	6%	4%	9%	Prefer not to answer	17%	17%	17%
Asian	5%	7%	3%				
Other	5%	5%	6%				

City of Residence

One-half of respondents live in Phoenix (51%) with Transit Dependent Riders more likely to live in Phoenix than Transit Independent Riders (59% vs. 45%).



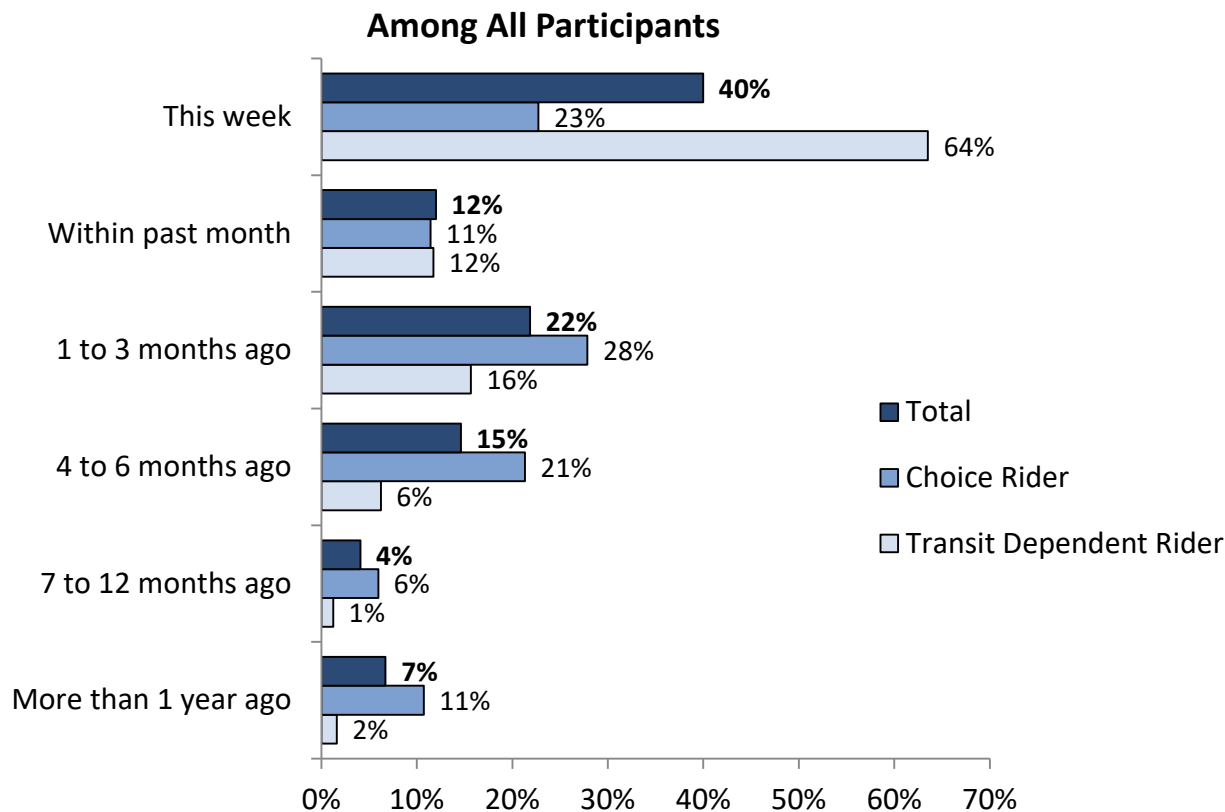
Q23: Which city do you live in?

Total n=1399 Choice Rider n=840 Transit Dependent Rider n=559

Public Transit Usage

More than one-half of survey respondents used public transit in the Phoenix area within the past week (40%) or month (12%). An additional one in five (22%) last used transit one to three months ago.

While Transit Dependent riders were significantly more likely than Transit Independent Riders to report riding transit in the past week (64% vs. 23%), Transit Independent Riders were more likely to report riding one month or longer ago (66% vs. 25%).



Q1: When was the last time you used public transit here in the Phoenix area?
 Total n=1494 Choice Rider n=840 Transit Dependent Rider n=562

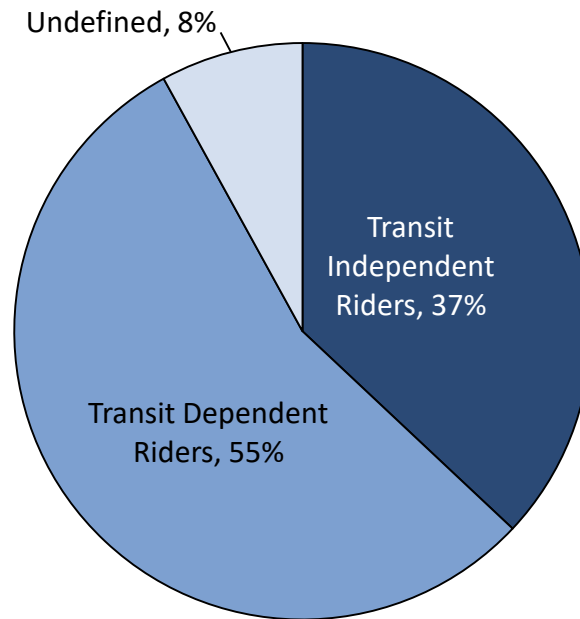
Current Riders (Used Public Transit within 30 days)



Current Riders

More than half of current riders (those who have used public transit in the past 30 days) are transit dependent riders (55%) while roughly one-third are transit independent riders (37%). “Undefined riders” refers to those respondents who only partially completed the survey and did not answer the demographic questions.

Breakdown of Current Riders

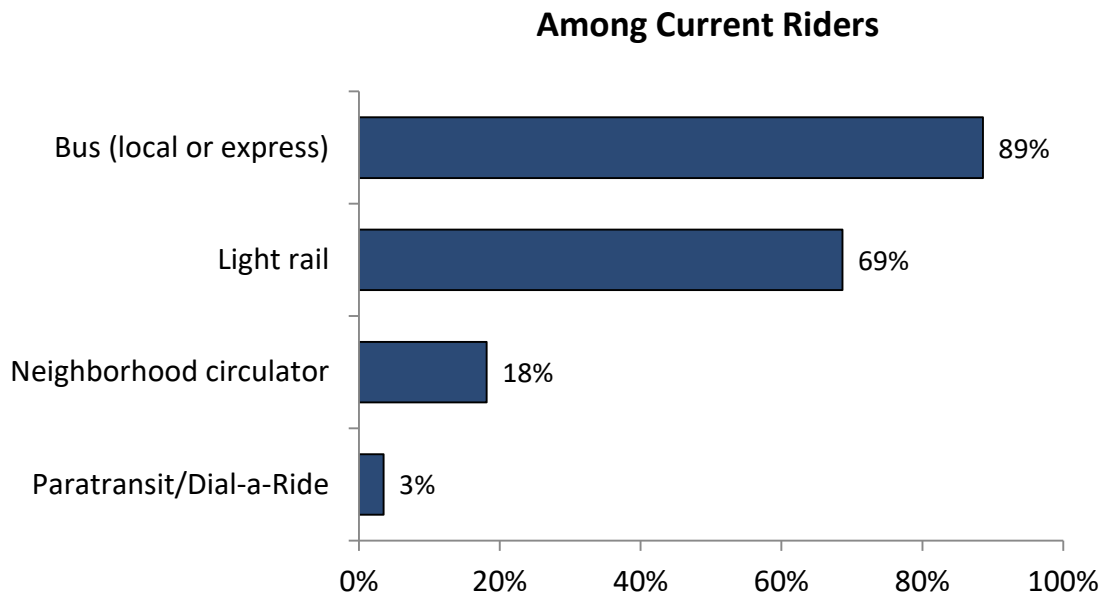


Total n=772 Choice Rider n=285 Transit Dependent Rider n=423 Undefined n=64

Current Usage of Public Transit

Most current transit users ride the bus (89%) and/or light rail (69%) with 18% reporting they use neighborhood circulators. A few (3%) rely on paratransit or Dial-a-ride services from Valley Metro.

Transit Dependent Riders are significantly more likely than Transit Independent Riders to report riding the bus (93% vs. 82%) and slightly more likely to report using other modes.



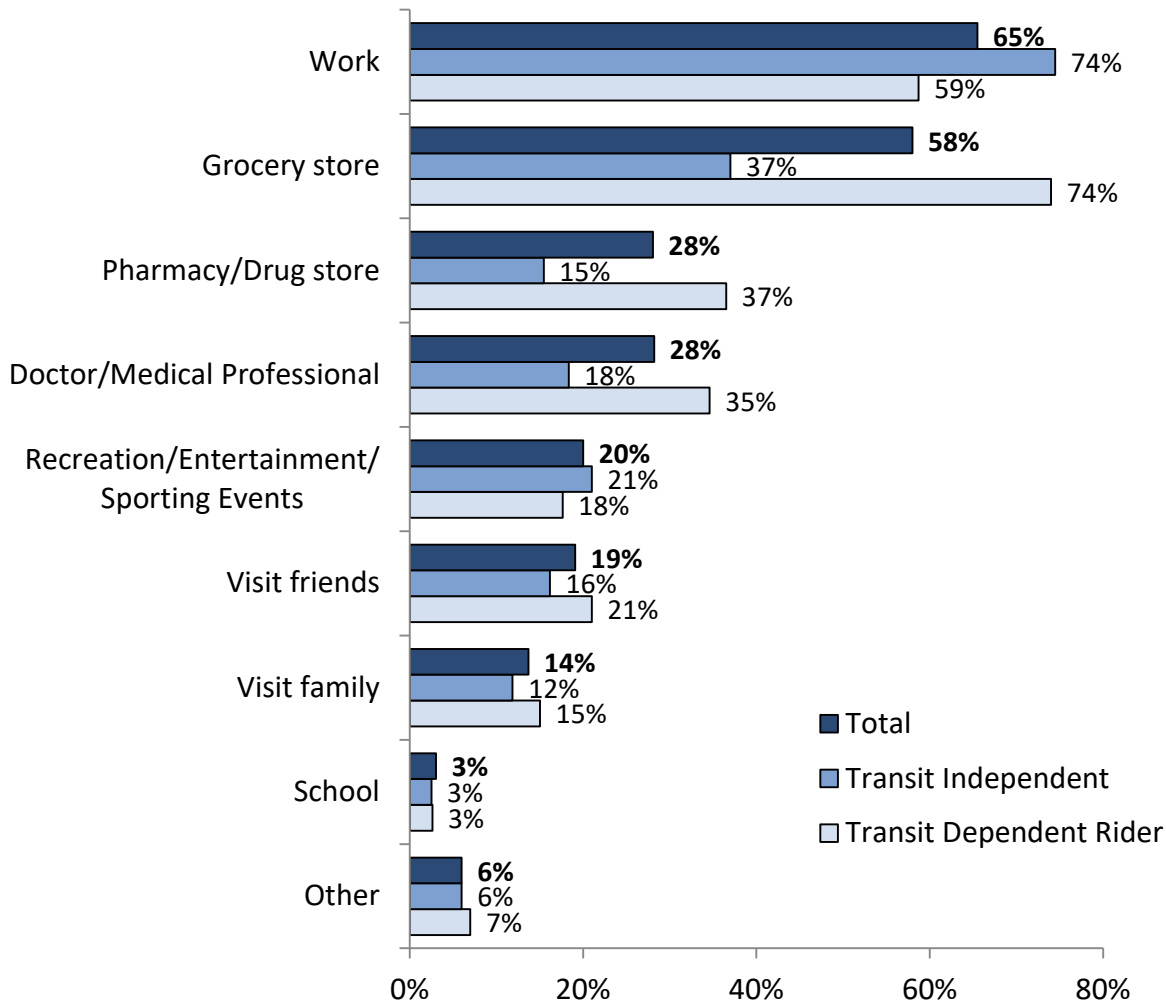
Types of Trips in the Past 30 Days

Work (65%) and grocery store (58%) trips were the most prevalent trips current riders made in the past month.

While transit independent riders were most likely to take transit to work (74%), transit dependent riders were more likely to have relied on transit for daily trips and errands, especially the grocery store (74%). followed by trips to work (59%).

To Note: 72% of the current riders who reported going to work in the past month were also self-identified as essential workers.

Among Current Riders



Q3: In the past 30 days, what type of trip(s) have you made using public transit?
 Total n=759 Choice Rider n=278 Transit Dependent Rider n=419 Undefined n=62

Other Types of Trips in the Past 30 Days

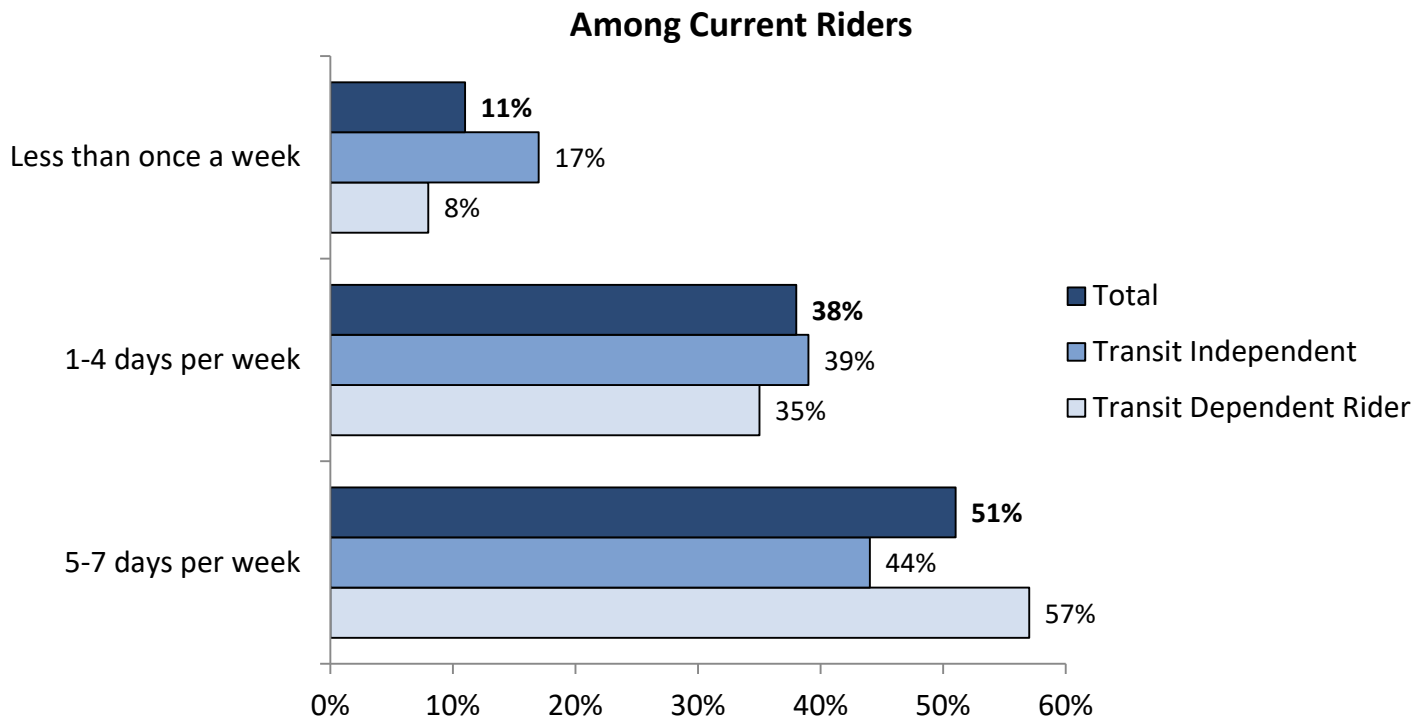
Other Types of Trips	n759
Bank/errands/paying bills	2%
Church	1%
Court/jury duty	<1%
Pick up take out food/restaurant food	<1%
Protests/paying bills	<1%
Automotive repair shop	<1%
Barber/hair cut	<1%
Rental car/pick up rental car	<1%
Volunteering	<1%
Home/going home	<1%
Airport	<1%
Vehicle broke down	<1%
Other	<1%
Don't know	1%

Q3: In the past 30 days, what type of trip(s) have you made using public transit?
 Total n=759 Choice Rider n=278 Transit Dependent Rider n=419 Undefined n=62

Current Frequency of Using Public Transit

Overall, one-half (51%) of current riders use public transit five or more days per week. Dependent Riders (57%) were significantly more likely than Transit Independent Riders (44%) to report riding at this high level of frequency.

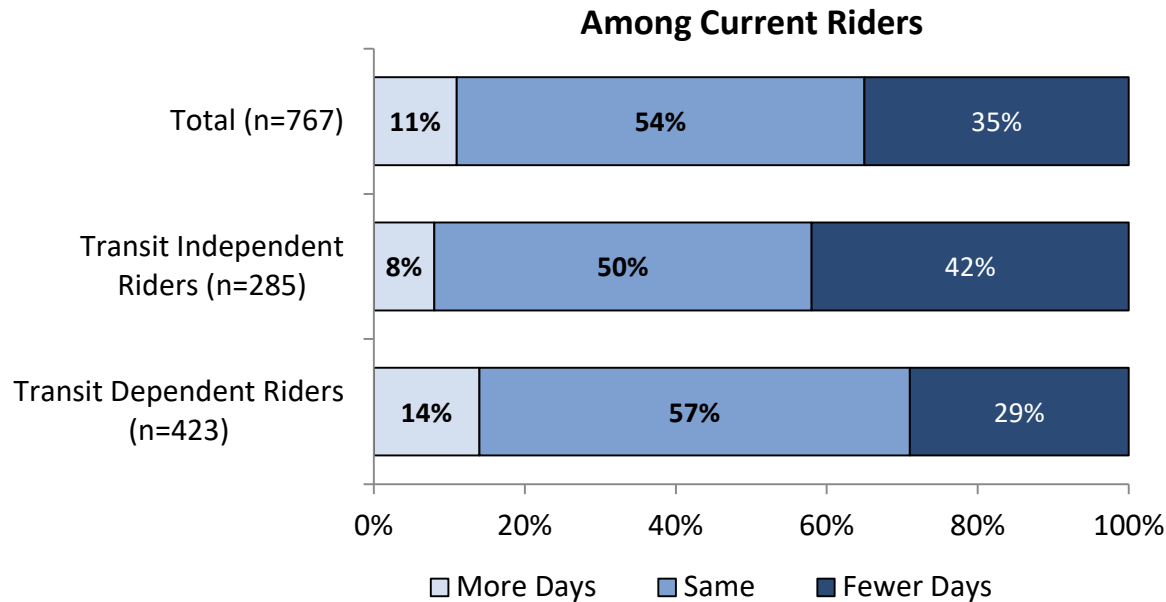
In total, 28% use transit two days or less per week with more than one-third (36%) of Transit Independent Riders typically riding at this frequency and only 23% of Dependent Riders doing so.



Q4: Currently, In an average week, how many days do you use public transit?
Total n=769 Choice Rider n=285 Transit Dependent Rider n=423 Undefined n=61

Change in Frequency of Public Transit Usage Since COVID-19

While more than one-half (54%) of current transit users say they are riding the same number of days per week as they were prior to the COVID-19 pandemic, over one-third (35%) are riding fewer days per week and one in ten (11%) are riding more days per week than prior to the onset of the pandemic. Transit Independent riders were more likely to say they are riding fewer days than before the pandemic (42% fewer days vs. 29% for transit dependent riders).

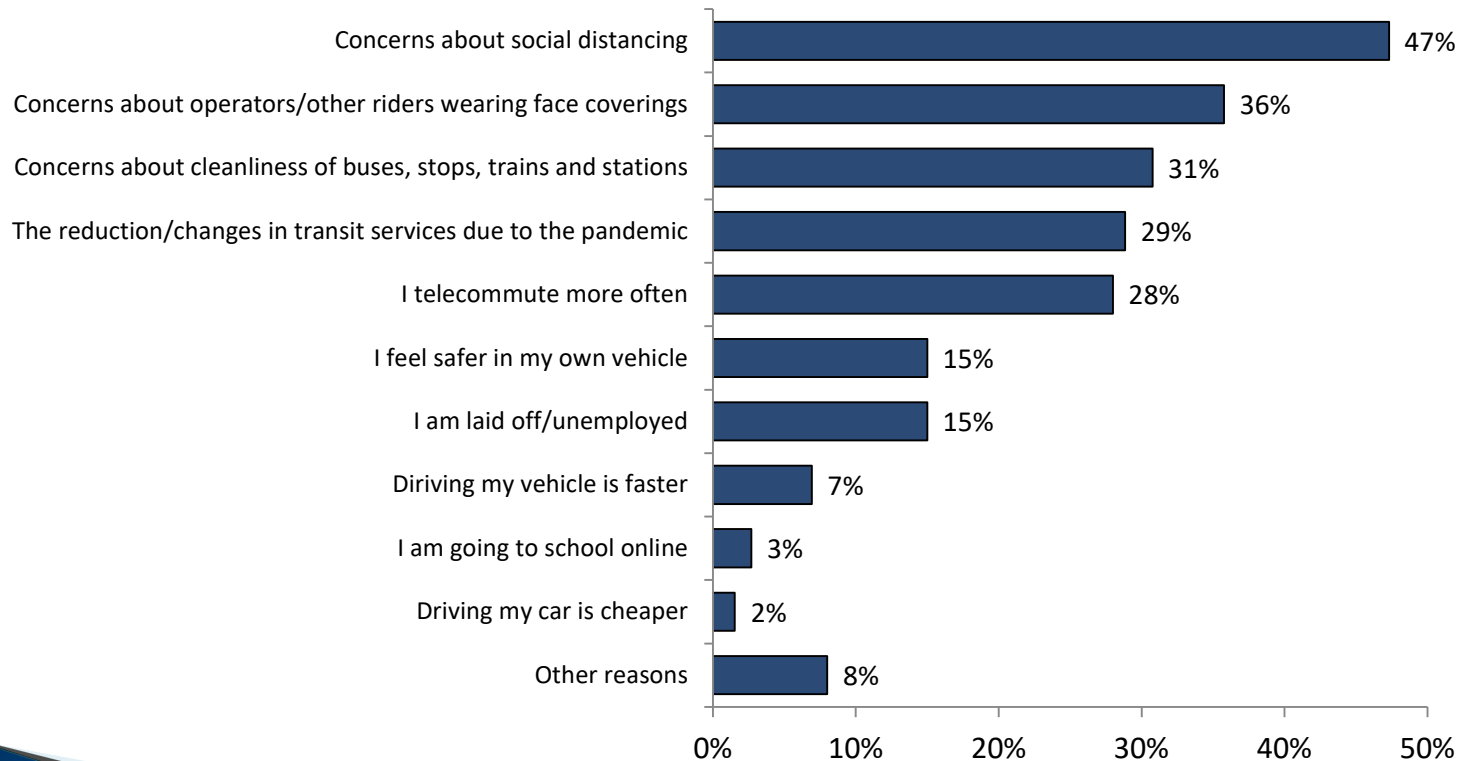


Q4a: Is that more, less or the same number of days per week you were using public transit before the start of the COVID-19 pandemic?

Reasons For Using Public Transit Less Often

Current riders who are using public transit less often than prior to COVID-19 most often selected concerns over social distancing (47%), mask wearing (36%), and cleanliness (31%) as the reasons for decreased usage. Transit Independent riders are more likely to cite telecommuting more (36% vs. 23%) and feeling safer in their own vehicle (27% vs. 2%).

Among Current Riders Using Public Transit Less Often



Other Reasons For Using Public Transit Less Often

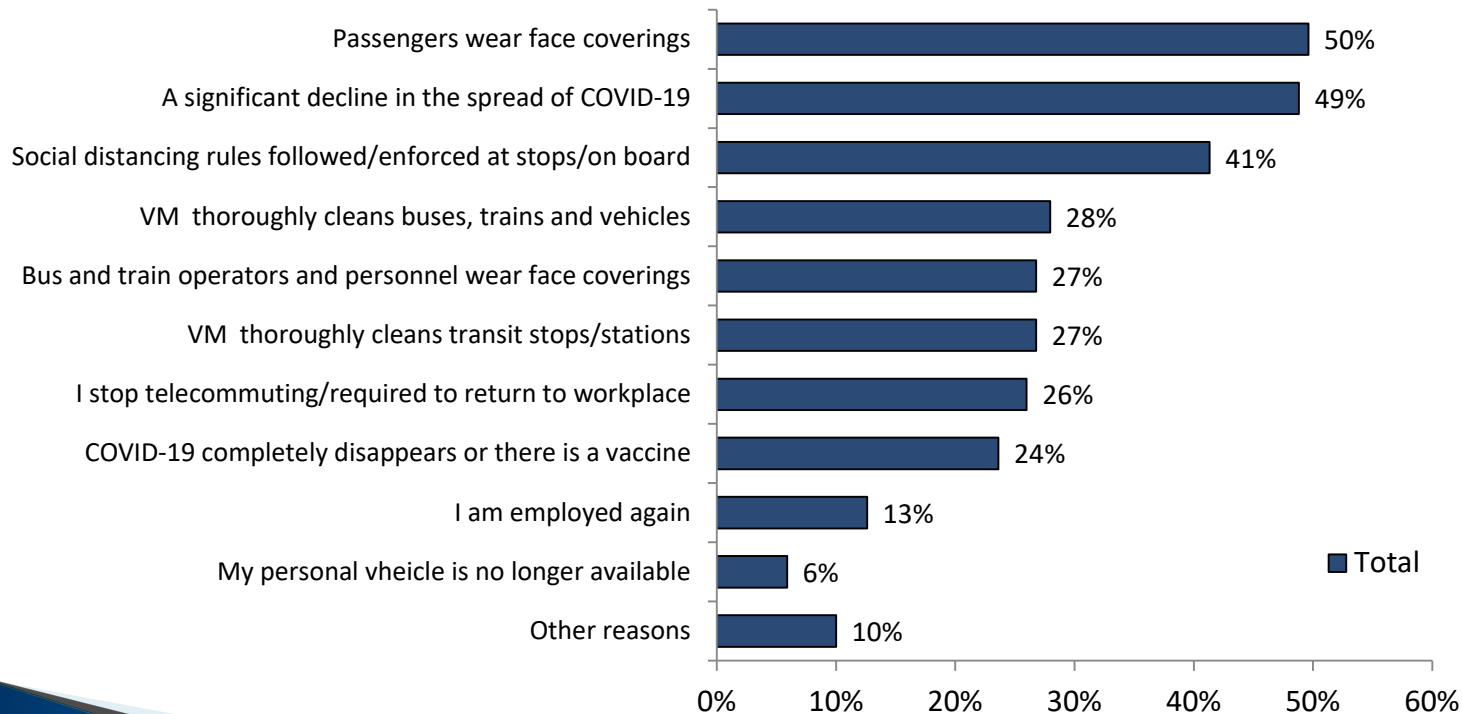
Other Reasons	n=260
Lack of security/doesn't feel safe	1%
COVID-19	1%
I am not working as much/hours has been cut short	1%
I use my bike more	1%
It's too hot outside	1%
Stay home more	1%
Use rideshare/Uber/Lyft	1%
Other	2%

Requirements to Return to Pre-COVID Transit Use Frequency

Passengers wearing face coverings (50%), a significant decline in the spread of COVID-19 (49%), and enforced social distancing (41%) were the top three requirements that need to happen before riders who are currently riding less often than before would resume riding transit as frequently as they had in the past.

Although the rank order of requirements is similar, more Transit Independent riders reported needing all of these requirements in place before using transit again, while fewer transit dependent riders selected specific requirements. In addition, transit independent riders were more concerned with safety and cleanliness, while transit dependent riders were more vocal about seeing a decline in COVID-19 or having access to a vaccine before returning.

Among Current Riders Using Public Transit Less Often



Q4d: Which of the following need to happen for you to go back to using public transit with the same frequency as you did before the pandemic?

Total n=254

Other Requirements to Return to Pre-COVID Transit Use Frequency

Other Requirements	n=254
When they allow more passengers on busses/trains/Limit is gone	2%
Bus/train schedule goes back to normal/service returns	1%
Work schedule is back to normal	1%
There is more security/security that enforces rules	1%
Other	4%

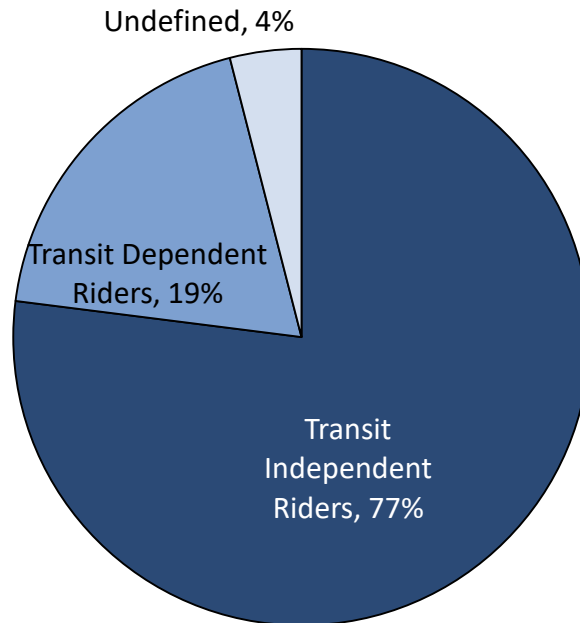
**Former Riders
(Have Not Used Public Transit within 30 days
But have used transit in past year)**



Former Riders

The majority of former riders (those who have not used public transit in the past 30 days) are Transit Independent riders (77%) while only one-fifth are Transit Dependent riders (19%).

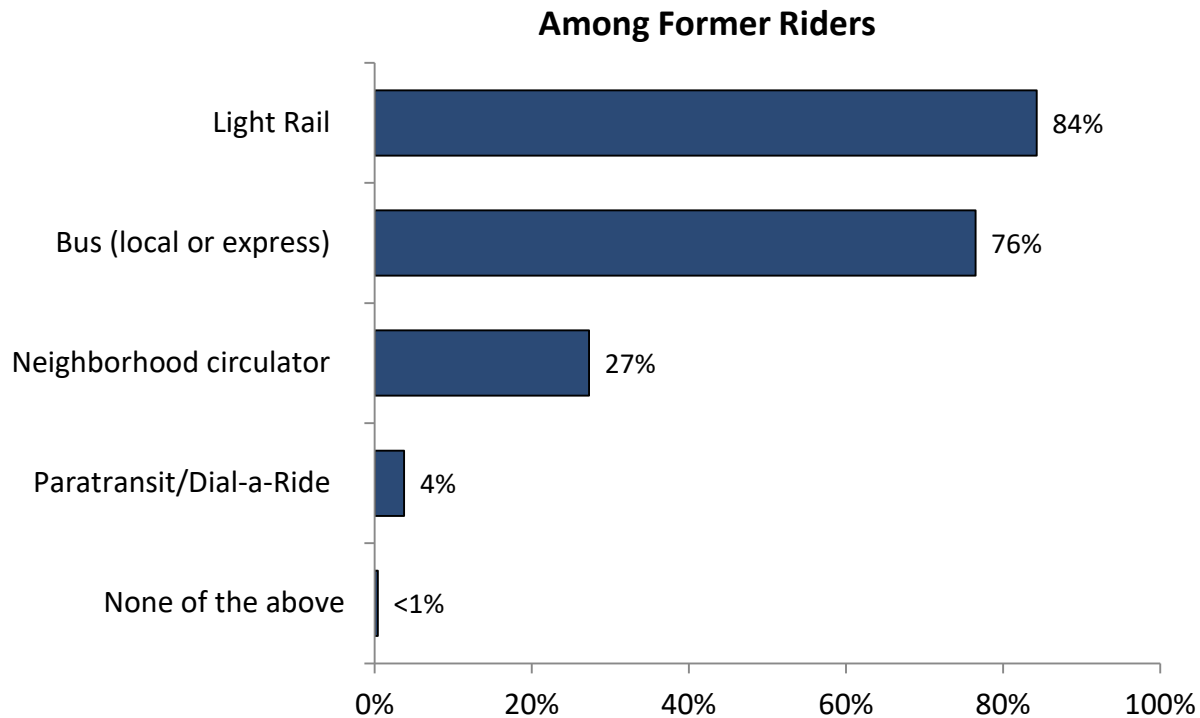
Breakdown of Former Riders



Total n=718 Transit Independent Rider n=553 Transit Dependent Rider n=139 Undefined n=26

Former Usage of Public Transit

A majority of former transit users have used light rail (84%) and/or the bus (76%). Just over one in four (27%) previously used a neighborhood circulator. A few (4%) relied on paratransit or Dial-a-Ride in the past. Nearly all former Transit Dependent Riders previously rode the bus (92% vs. 74% of Choice Riders).



Q5: What modes of public transit have you used in the past?

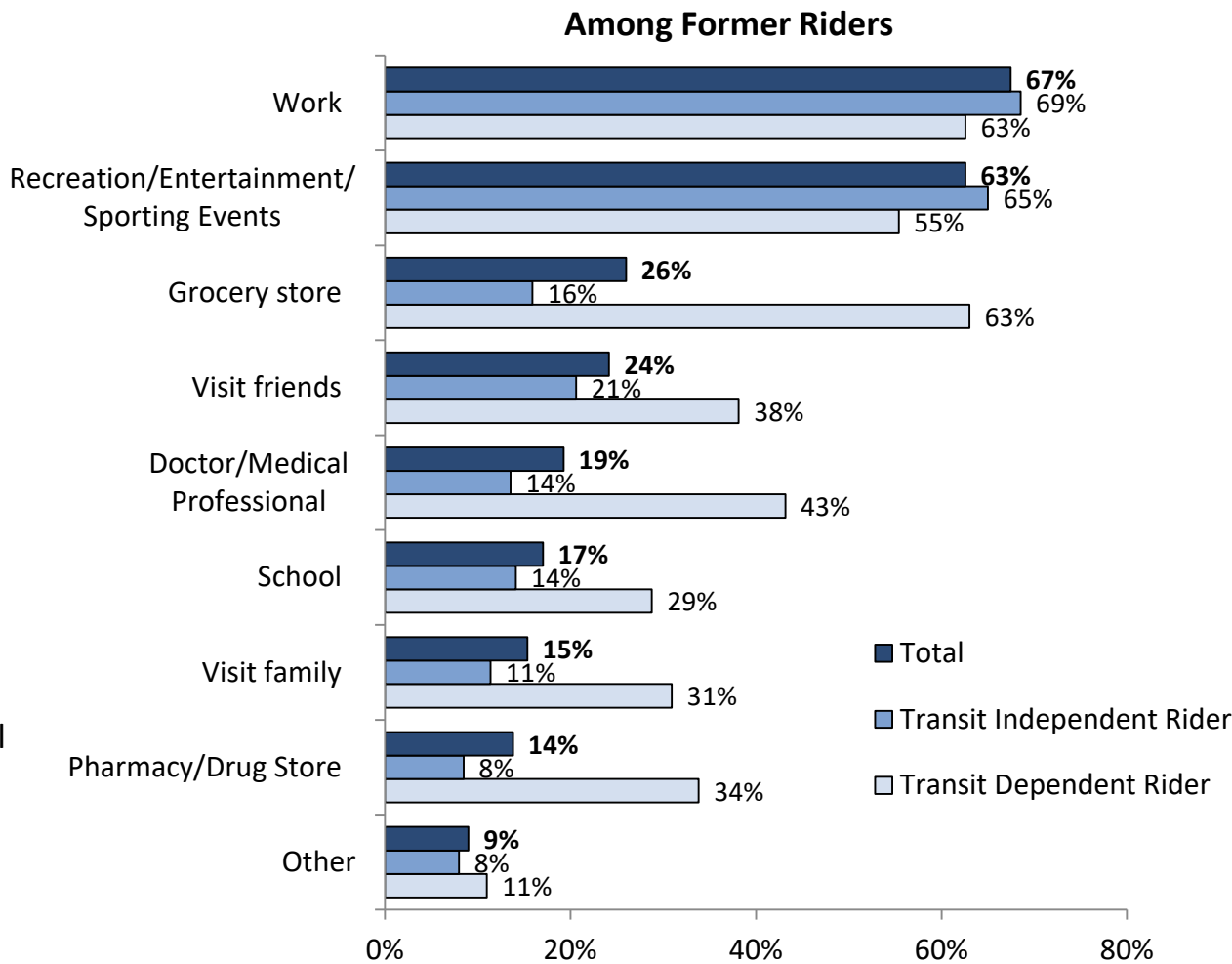
Total n=718

Types of Trips of Former Transit Usage

Work (67%) and Recreation (63%) were the most prevalent types of trips former riders made in the past.

Overall, one in four reported using transit for trips to the grocery stores (26%) and/or to visit friends (24%).

While both types of riders were equally likely to report using transit for work and recreation/entertainment trips, former transit dependent riders were much more likely to use it for all other trips, including grocery store visits (63% vs. 16% choice rider).



Q6: Please select the type of trip(s) you made using public transit in the past.
 Total n=716 Transit Independent Rider n=553 Transit Dependent Rider n=139
 Undefined n=24

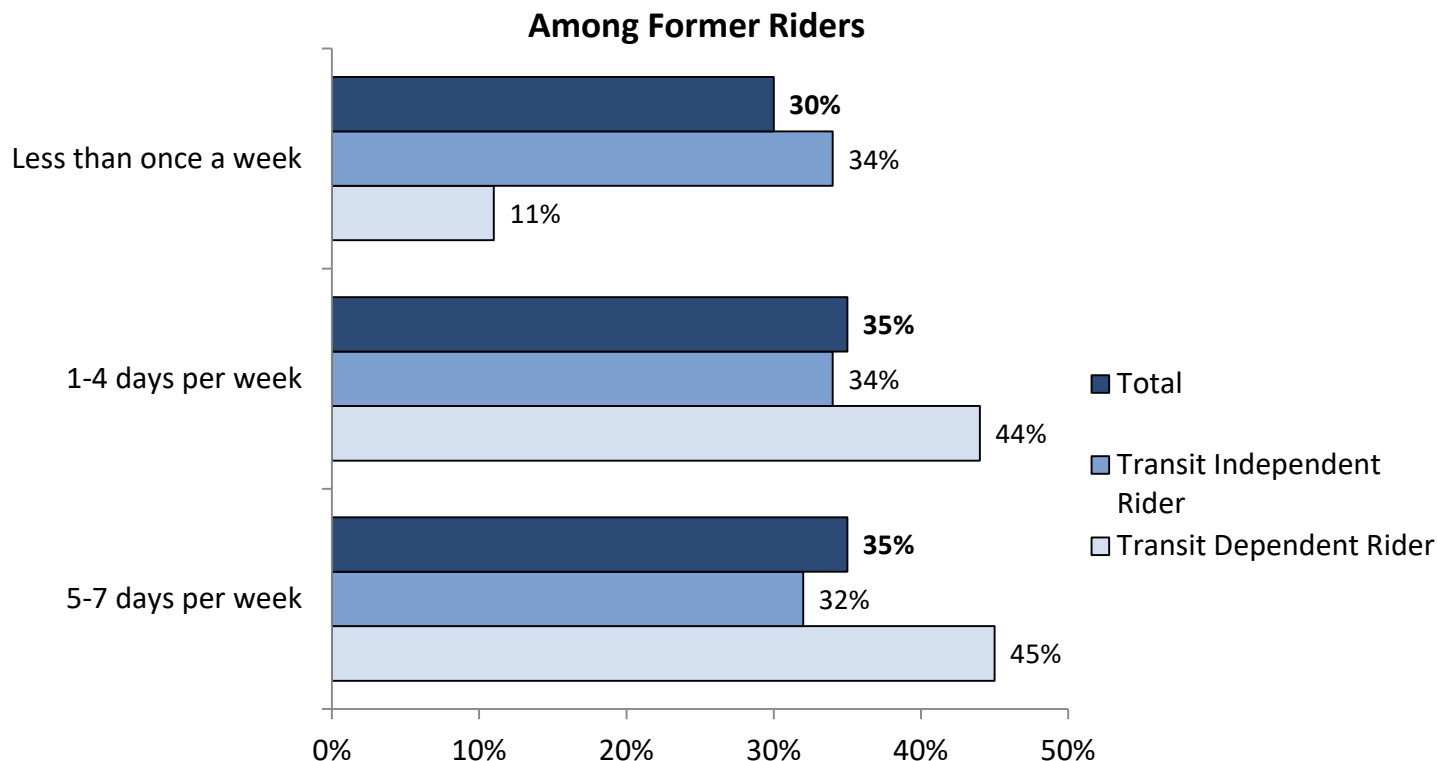
Types of Trips of Former Transit Usage

Other Types of Trips	n=716
Airport	2%
Bank/errands/paying bills	1%
Church	1%
Court/jury duty	1%
Automotive repair shop	1%
Library	1%
Volunteering	<1%
Pick up take out food/restaurant food	<1%
Meeting (unspecified)	<1%
Protests/peaceful protests	<1%
Home/going home	<1%
Public meetings/hearings at city hall/city transit meetings	<1%
Other	<1%
Don't know	1%

Q6: Please select the type of trip(s) you made using public transit in the past.
 Total n=716 Choice Rider n=553 Transit Dependent Rider n=139 Undefined n=24

Former Frequency of Using Public Transit

Overall, 30% of former riders reported typically riding transit less than one day per week though very few former Transit Dependent Riders reported riding at this low frequency (12%). Dependent riders were significantly more likely to have ridden 5-7 days a week (45% vs. 32% of choice riders).



Q7: In an average week, how many days did you use public transit?

Total n=713 Transit Independent Rider n=553 Transit Dependent Rider n=139

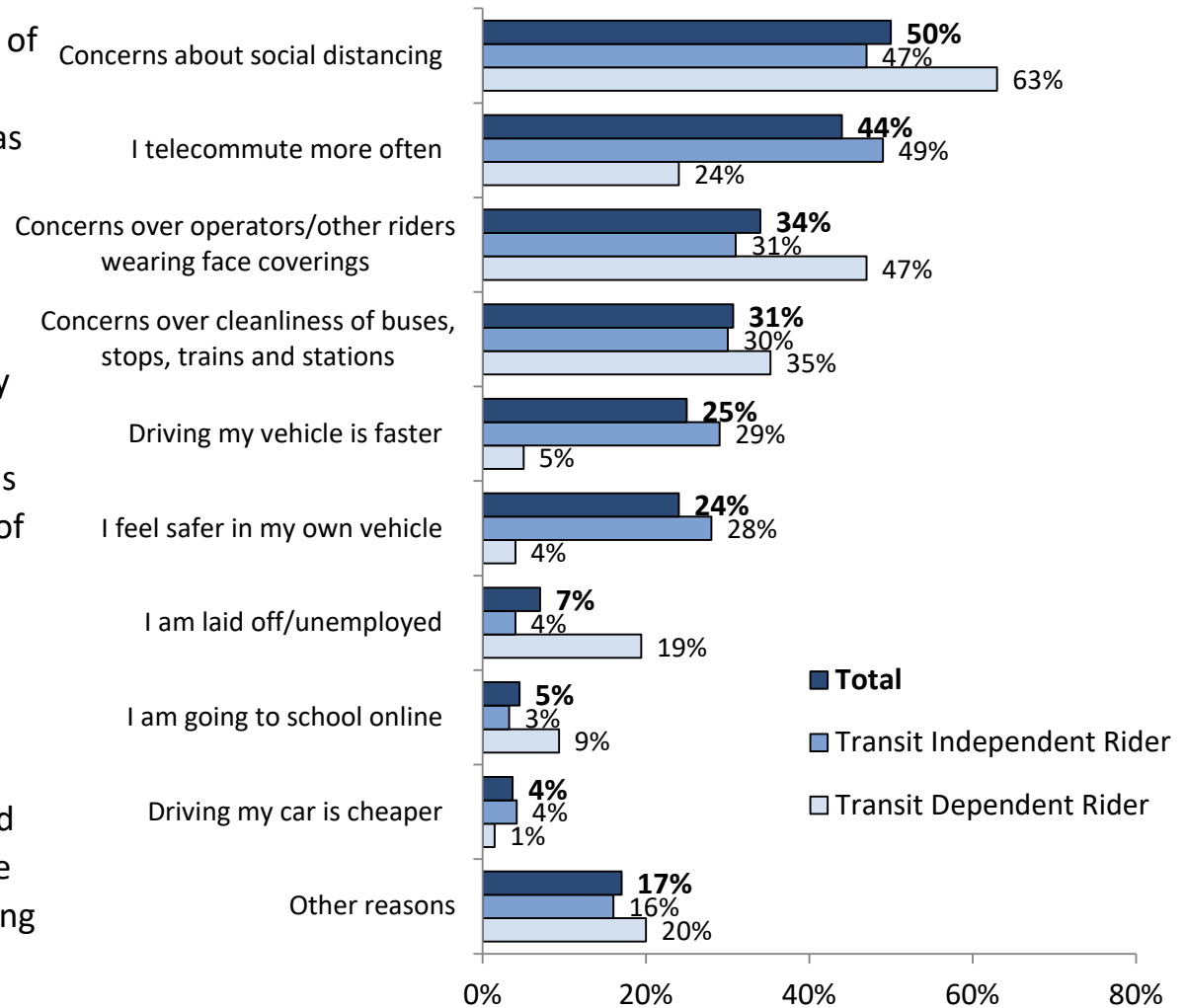
Primary Reasons for Not Currently Using Public Transit

Former riders most often selected *concerns about social distancing* as one of their top three reasons for not riding public transit at this time (50%). This was of greater concern among Transit Dependent Riders (63%).

While 44% reported telecommuting more often as a primary reason, roughly one-third cited concerns over face coverings (34%) and cleanliness (31%) as top reasons for discontinuing their use of public transit.

Notably, transit dependent riders were more concerned with a safe and clean riding experience while transit independent riders were more impacted by their personal ability to telecommute or drive their own vehicle instead of using public transit.

Among Former Riders



Q8: Please select the three primary reasons you are not using public transit right now?
Up to 3 responses selected.

Total n=711 Transit Independent Rider n=553 Transit Dependent Rider n=139

Primary Reasons for Not Currently Using Public Transit

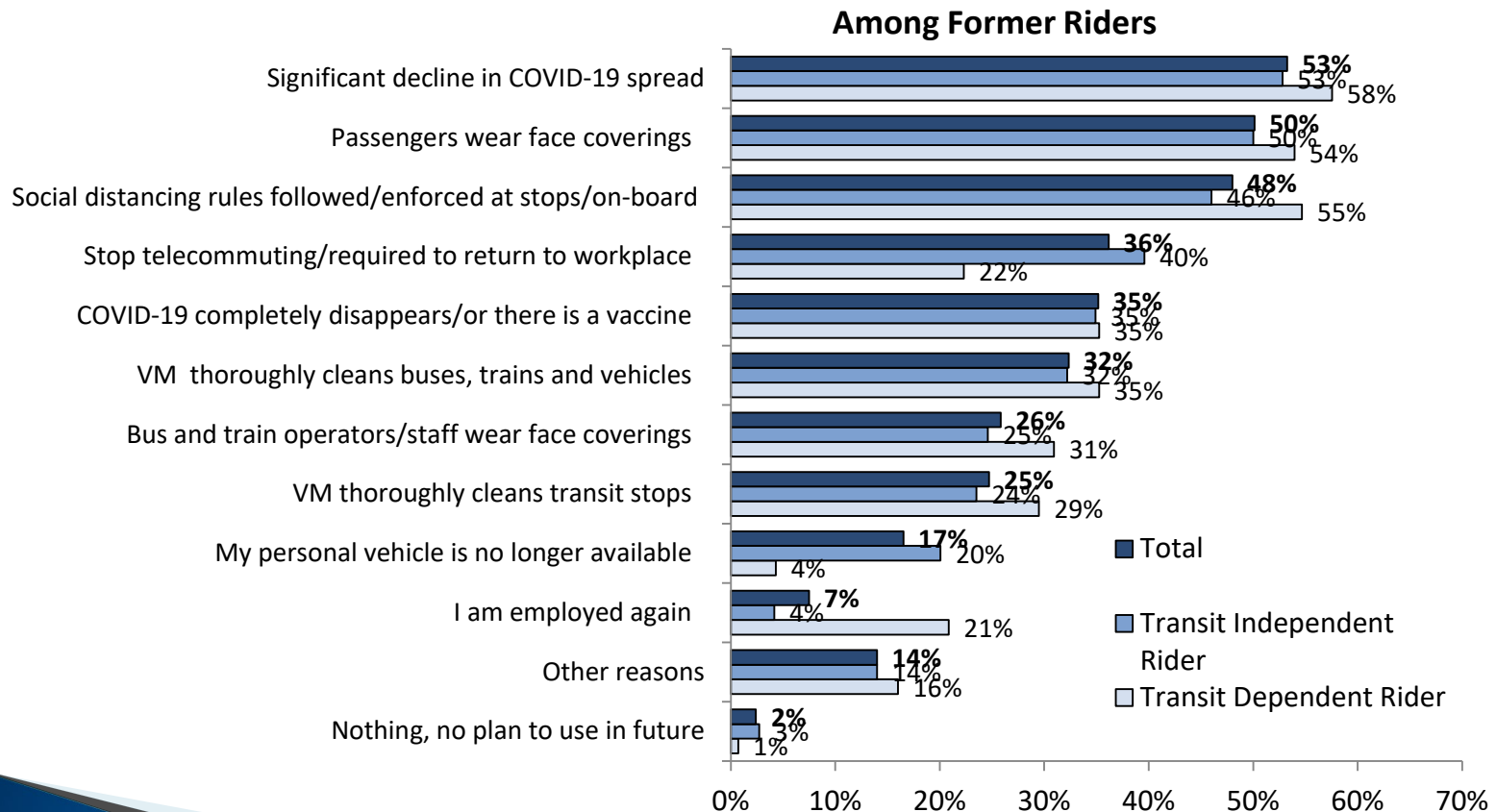
Other Primary Reasons	n=711
Venues (entertainment/sports events)/business are closed	2%
There is no public transit where I live/work	2%
Concerns about other people infected with COVID-19/being exposed to Covid-19/I have health issues	2%
Transients/homeless people	2%
Limited hours of operation on buses/trains	1%
I ride my bike/bicycle	1%
Don't go out much/stay home more	1%
Retired	1%
It's too hot outside/weather	1%
Lack of security/not safe on light rail/buses/stops	1%
Work schedule	1%
I carpool/vanpool	1%
I can walk to work	1%
State lockdown	1%
Other	2%
Don't know	1%

Q8: Please select the three primary reasons you are not using public transit right now? Up to 3 responses selected.

Total n=711 Choice Rider n=553 Transit Dependent Rider n=139

Requirements to Return to Using Public Transit

A significant decline in the spread of COVID-19 (53%), passengers wearing face coverings (50%), and enforced social distancing (48%) were the top three requirements former riders selected as necessary for them to resume riding public transit. While all riders want COVID to decline and to feel transit is clean, transit dependent riders were looking at train conditions to determine when they will ride again. Transit Independent riders, on the other hand, were looking at changes to their personal circumstances such as telecommuting and vehicle availability.



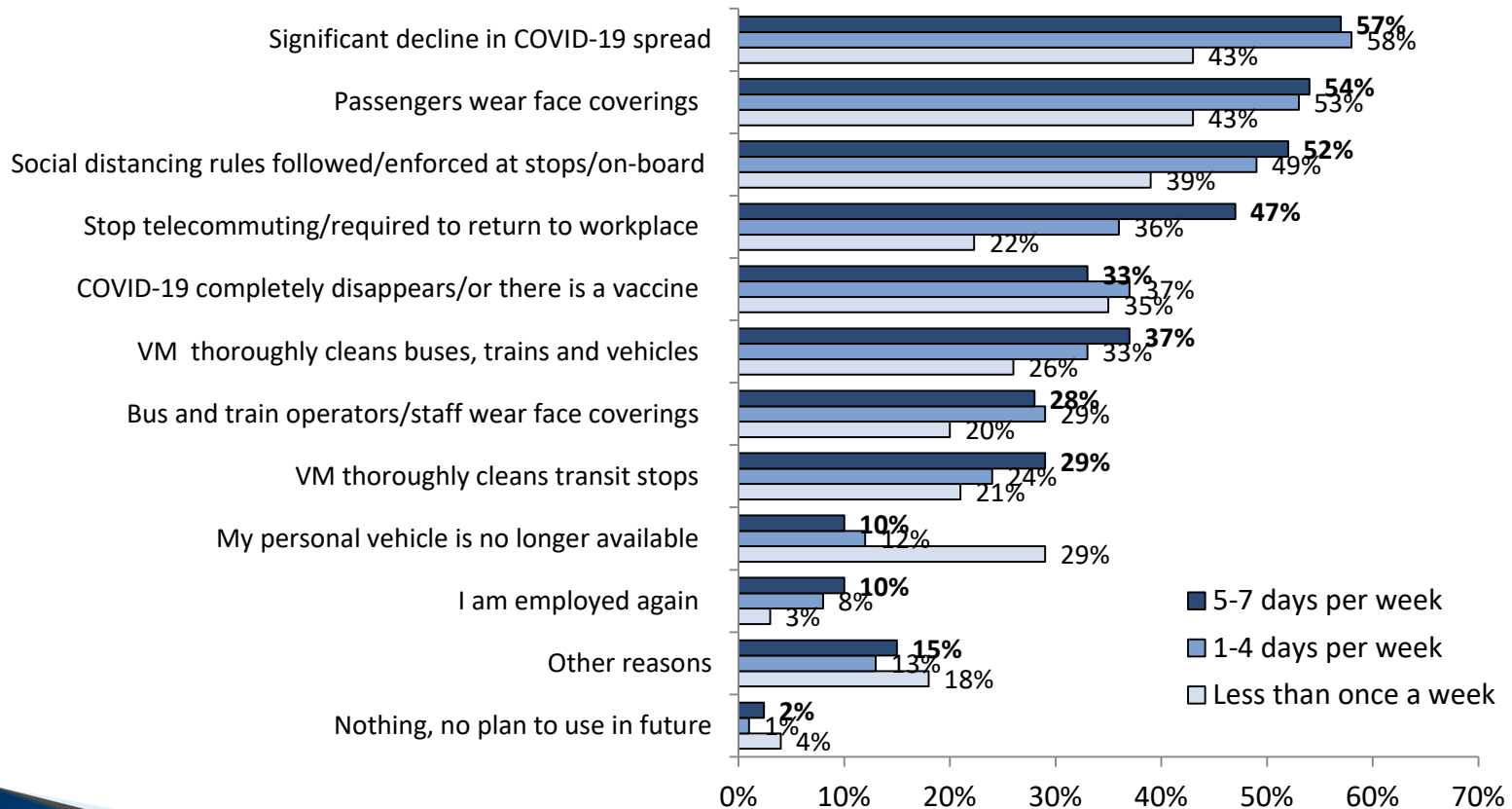
Q9: Which of the following need to happen for you to go back to using public transit at all, or with the same frequency as you did before the pandemic?

Total n=708 Transit Independent Rider n=553 Transit Dependent Rider n=139

Requirements to Return to Using Public Transit by Frequency

When respondents are split by previous frequency of public transit usage, the rank order of requirements stays roughly the same among groups. However, riders who formerly used transit less than once a week will be much more likely to return to that frequency if their own vehicle is no longer available. Riders who used to use transit 5-7 days a week will be much more likely to return once they are no longer required to telecommute.

By Previous Frequency of Former Riders



Q9: Which of the following need to happen for you to go back to using public transit at all, or with the same frequency as you did before the pandemic?

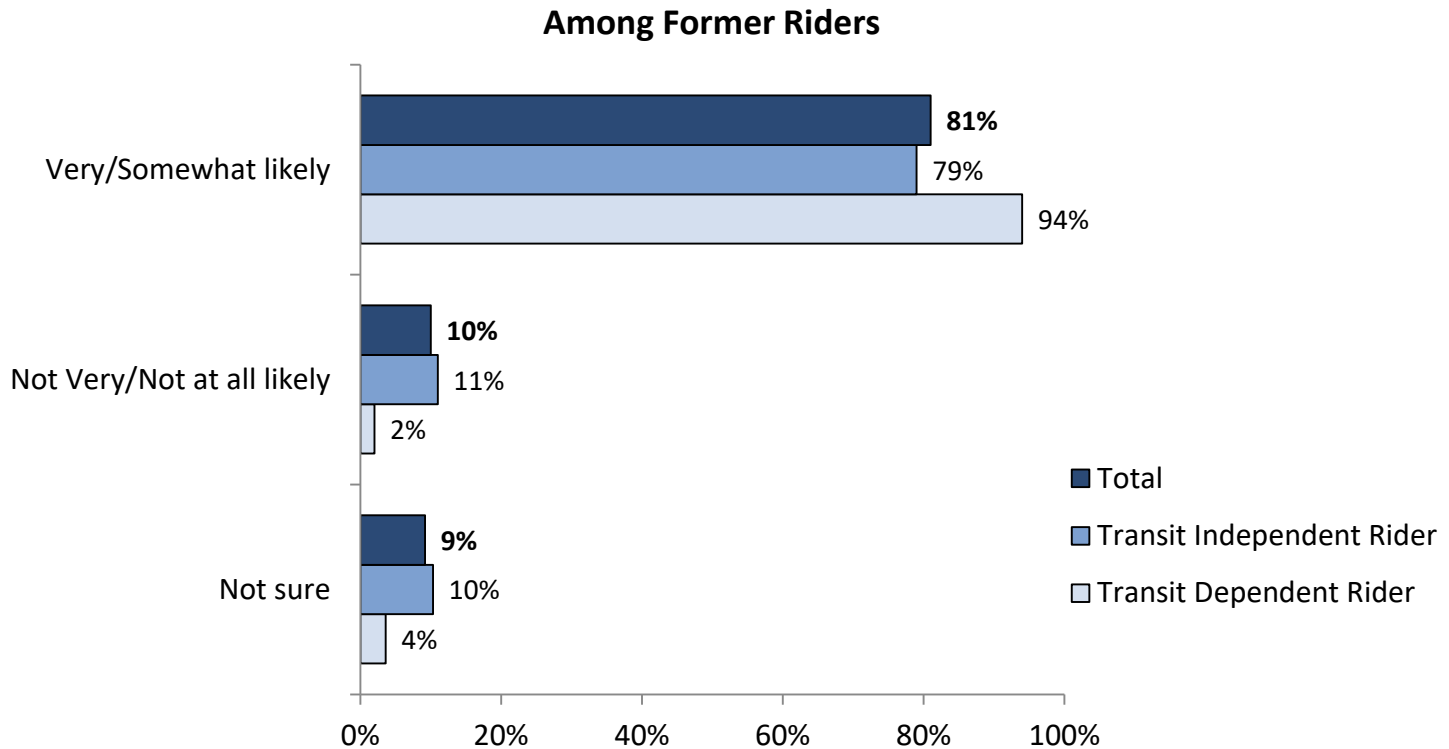
5-7 days per week n=249 1-4 days per week n=250 Less than once a week n=209

Requirements to Return to Using Public Transit

Other Requirements	n=708
Everything is back to normal//places open up again//safe to visit destinations//sporting events are back	2%
Bus/train schedule goes back to normal//service returns	2%
When they stop enforcing the wearing of a mask//don't like the mask//feel like I'm suffocating	1%
When you get rid of transients and homeless	1%
There is more security//security that enforces rules	1%
When I'm closer to a bus stop//closer to public transportation	1%
If it was faster//total transit time reduced	1%
Cooler weather	1%
When they allow more passengers on busses/trains//10 passenger policy is over	<1%
When it's more convenient//easy to travel	<1%
If the buses were less crowded/if there was more seating//it's standing room only	<1%
If there is traffic//traffic congestion	<1%
Bring the Scottsdale trolley back//Scottsdale trolley service starts again	<1%
Other	3%
Don't know	1%

Likelihood to Use Public Transit in Future

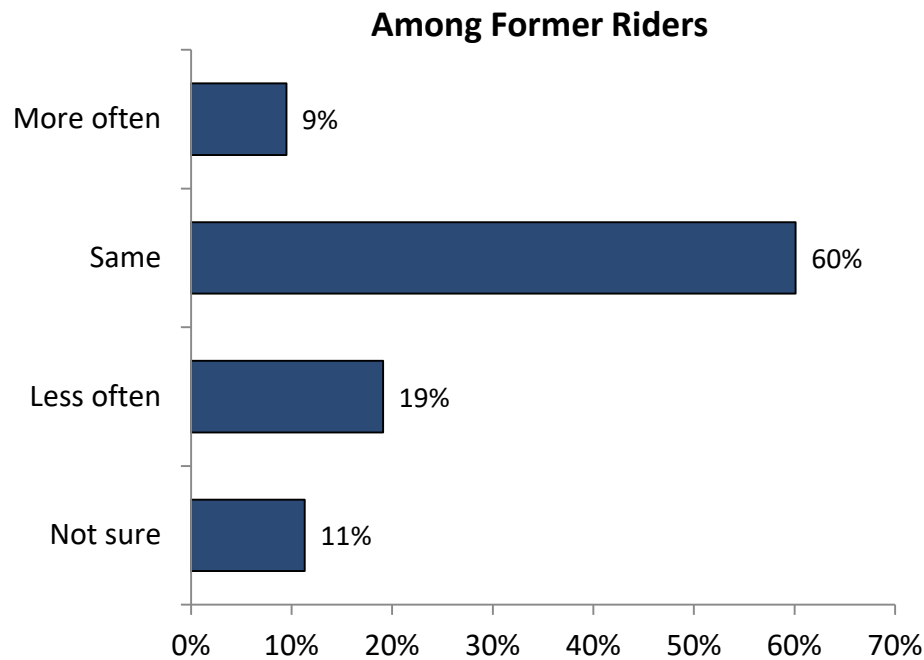
Overall, 81% of former riders indicated they are “very” (54%) or “somewhat” (27%) likely to use public transit again in the future. Transit Dependent Riders were significantly more likely than Transit Independent Riders to be “very” or “somewhat likely” to use transit again (94% vs. 79%). Just one-tenth of all former riders reported being “not very” or “not at all likely” to use public transit again in the future.



Q10: How likely are you to use public transit again in the future? Are you...
Total n=708 Transit Independent Rider n=553 Transit Dependent Rider n=139

Anticipation of Future Public Transit Usage

More than two-thirds of former riders (69%) anticipate that once they resume using public transit, they will ride transit *more often* or at the *same* level they were prior to the pandemic. While 19% believe they will use it *less often*, an additional 11% are *not sure*.



Q10A: Once you start using public transit again, do you think you will use it more or less often than before the pandemic, or about the same?

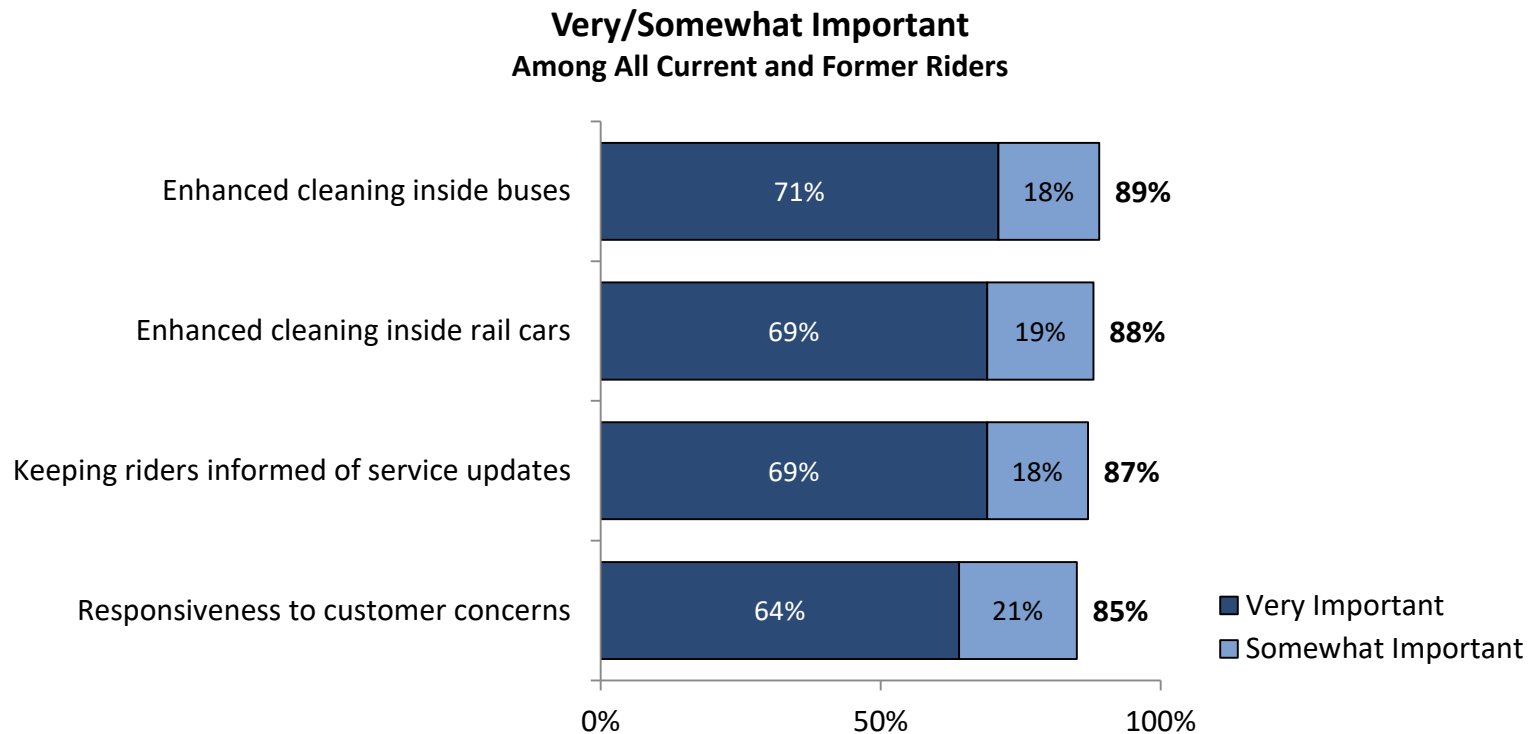
Total n=707

All Current and Former Riders



Importance of Efforts to Make Riders Feel Comfortable – Top 4

Enhanced cleaning inside buses and rail cars, keeping riders informed of service updates, and responsiveness to customer concerns rank as the top four most important ways Valley Metro can make riders feel comfortable using public transit in metro Phoenix now and in the future (85%-89% rated “very” or “somewhat important”). *Service updates* ranked as most important among Transit Dependents Riders (92%).

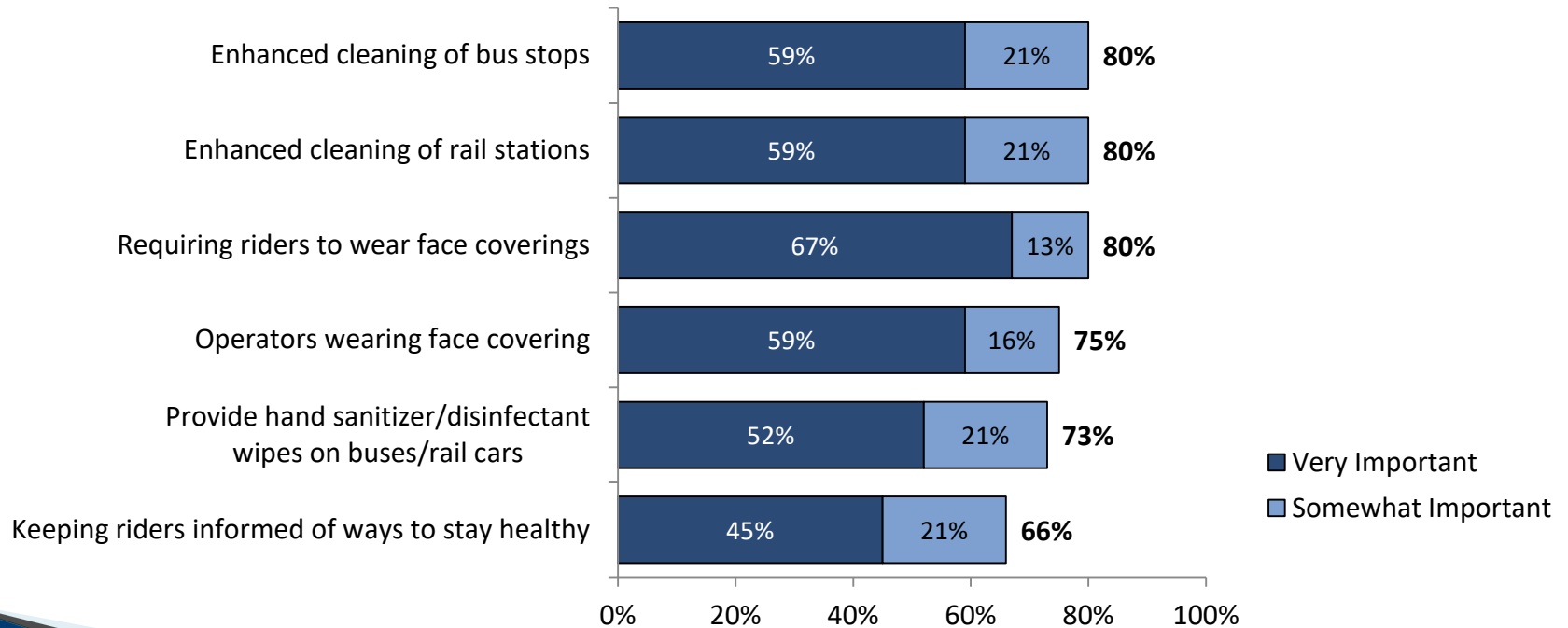


Q11: Please rate the importance of each of the following efforts by Valley Metro in making you feel more comfortable using public transit in metro Phoenix now and in the future.
Total n=1437

Importance of Efforts to Make Riders Feel Comfortable – Cont.

Four in five transit users felt it was “somewhat” or “very” important for Valley Metro to provide *enhanced cleaning of bus stops and rail stations* and to *require riders to wear face coverings* to make them feel more comfortable using public transit now and in the future (80% for each). Lastly, a two-thirds to three-fourths majority of current and former riders felt it was important for Valley Metro to make them more comfortable using public transit by having *operators wear face coverings* (75%), *providing hand sanitizer and disinfectant wipes onboard buses and rail cars* (73%), and *keeping riders informed of ways to stay healthy* (66%).

Very/Somewhat Important Continued
Among All Current and Former Riders

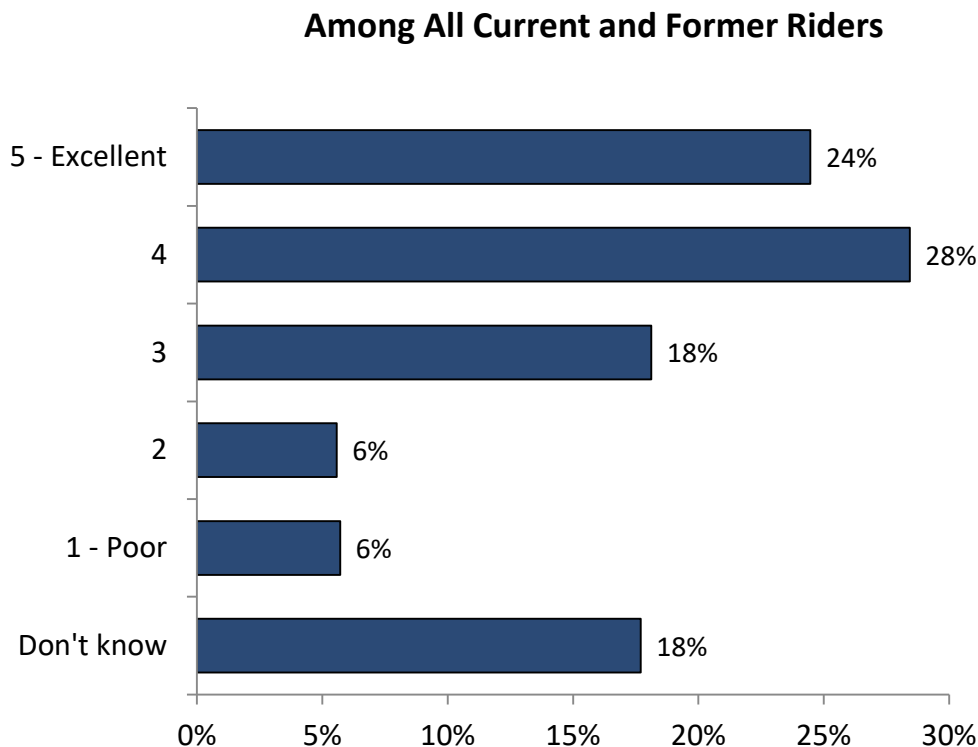


Q11: Please rate the importance of each of the following efforts by Valley Metro in making you feel more comfortable using public transit in metro Phoenix now and in the future.

Total n=1437

Safety and Security Ratings Amid COVID-19

Just over one-half (52%) of all survey respondents gave Valley Metro high ratings for keeping riders safe and secure since the start of the COVID-19 pandemic (24% “5- Excellent” + 28% “4” rating). Notably, Transit Independent Riders were significantly more likely to give a “don’t know” response (24% vs. 9% of other riders).



Q12A: Based on what you have seen or heard, please rate Valley Metro on its efforts to keep riders safe and secure since the start of the COVID-19 Pandemic?
Total n=1435

Ways Valley Metro can Make Passengers Feel Safe Amid COVID-19

***Note that this survey was conducted prior to the face covering requirement on transit.**

Just over one-third (35%) of all respondents would feel safe and secure riding public transit if Valley Metro *required masks for drivers and passengers*. One-fifth (20%) would feel safe if Valley Metro *communicated information on their steps of keeping buses and trains clean*.

An additional one-tenth would feel safe riding public transit with *proper social-distancing rules in place* (11%).

11% of respondents reported already feel safe and secure using public transit and don't need any improvements.

Valley Metro Actions	Total n=1425
Require masks/masks for drivers/passengers*	35%
Information on steps being taken to keep buses and trains clean	20%
Nothing/it works fine/no problems	11%
Require Social distancing/enforce social distancing	11%
More security/police/make it safer/enforce the rules	10%
Keep transient/people under the influence away from stops and light rails	6%
Sanitizing stations on the bus/bus stops/disinfect wipes on the train	5%
Covid 19 needs to be under control/government says it's safe	4%
More frequent buses/increased frequency for rider limit	4%
More communication on what's new/Covid updates	4%
More inspectors checking for passes on the light rail/too many people riding light rail for free	3%
Provide information/notification of any route changes/detours/broke down busses	2%
Capacity limit/rider restrictions may cause me to be stranded	2%
Better trained/courteous drivers/security personal (adhere to policies/procedures)	1%
Bus needs to be on time/long wait time	1%
Better bus stops/need better lighting at stop/vandalized stations in disrepair	1%
Updates on routes/passengers/drivers with Covid cases	1%
Visuals or audio about Covid procedures on the bus/at bus stops	1%
Go back to regular hours/schedule before the pandemic	1%
Other	7%
Don't know	11%