COVID Travel Survey #3
Background Information

- COVID Travel Survey #1 – April 8-19, 2020
- COVID Travel Survey #2 – June 22-July 3, 2020
- COVID Travel Survey #3 – December 5-23, 2020
  - Nearly 54,000 surveys were received
  - Survey included questions about:
    - How they traveled before COVID – NJT mode and trip purpose used most often
    - Current travel, cleanliness, personal space and face covering usage questions
    - Reason for not traveling
    - Work from home and related questions
    - Future expectations
A greater percentage of respondents were making at least one work trip per week in December

More Local Bus customers are making at least one non-work trip per week while fewer interstate bus and rail customers are making non-work trips

*Note: “mode” is the mode customers used by the customer before COVID.*
The percent of customers traveling for a Work Trip using the SAME NJ TRANSIT mode as before COVID has increased across all modes/markets from June to December.
Trip Frequency – WORK TRIPS

**BUS - NORTH JERSEY LOCAL**

- Before COVID: 37% 49% 20% 26%
- June: 11% 42% 16% 18%
- December: 4% 44% 12% 12%

**BUS - SOUTH JERSEY**

- Before COVID: 40% 45% 23% 20%
- June: 2% 13% 16% 11%
- December: 23% 38% 27% 11%

**BUS – NY Interstate**

- Before COVID: 66% 18% 37% 24%
- June: 4% 13% 24% 23%
- December: 10% 10% 29% 23%

**RAIL**

- Before COVID: 12% 63% 30% 33%
- June: 17% 7% 24% 25%
- December: 8% 37% 8% 34%

**LIGHT RAIL**

- Before COVID: 23% 58% 16% 20%
- June: 15% 4% 22% 23%
- December: 16% 38% 14% 23%

**ACCESS LINK**

- Before COVID: 10% 46% 41% 46%
- June: 33% 33% 30% 25%
- December: 12% 16% 10% 32%
Work Trips: Do you have a specific schedule for going to the worksite each week? What days of the week do you currently go into the office/worksite?

- **BUS–North Jersey Local**
  - 76% have a Set Schedule

- **BUS–South Jersey**
  - 78% have a Set Schedule

- **BUS – NY Interstate**
  - 74% have a Set Schedule

- **RAIL**
  - 70% have a Set Schedule

- **LIGHT RAIL**
  - 71% have a Set Schedule

- **ACCESS LINK**
  - 75% have a Set Schedule
Work Trips/No Set Schedule: Over the last several months, what factors have you considered when deciding to travel to the office/worksite?

- **BUS–North Jersey Local**: 24% have NO Set Schedule
  - Transit schedule: 28%
  - Personal schedule: 21%
  - Weather: 11%
  - Business Needs/Meeting: 6%
  - Traffic Conditions: 6%
  - Childcare/school schedule: 1%
  - Employer Needs/Tasks: 4%
  - Other: 6%

- **BUS–South Jersey**: 22% have NO Set Schedule
  - Transit schedule: 28%
  - Personal schedule: 25%
  - Weather: 20%
  - Business Needs/Meeting: 8%
  - Traffic Conditions: 8%
  - Childcare/school schedule: 6%
  - Employer Needs/Tasks: 1%
  - Other: 6%

- **BUS – NY Interstate**: 26% have NO Set Schedule
  - Transit schedule: 19%
  - Personal schedule: 24%
  - Weather: 17%
  - Business Needs/Meeting: 18%
  - Traffic Conditions: 10%
  - Childcare/school schedule: 5%
  - Employer Needs/Tasks: 1%
  - Other: 6%

- **RAIL**: 30% have NO Set Schedule
  - Transit schedule: 23%
  - Personal schedule: 22%
  - Weather: 15%
  - Business Needs/Meeting: 12%
  - Traffic Conditions: 7%
  - Childcare/school schedule: 6%
  - Employer Needs/Tasks: 1%
  - Other: 6%

- **LIGHT RAIL**: 29% have NO Set Schedule
  - Transit schedule: 24%
  - Personal schedule: 22%
  - Weather: 20%
  - Business Needs/Meeting: 13%
  - Traffic Conditions: 9%
  - Childcare/school schedule: 5%
  - Employer Needs/Tasks: 1%
  - Other: 6%

- **ACCESS LINK**: 25% have NO Set Schedule
  - Transit schedule: 26%
  - Personal schedule: 24%
  - Weather: 17%
  - Business Needs/Meeting: 10%
  - Traffic Conditions: 8%
  - Childcare/school schedule: 3%
  - Employer Needs/Tasks: 12%
  - Other: 3%
Ticket Types, Purchase Locations, and Payment Types

**BUS – Self-Reported Ticket Types**

- Monthly Pass: 49% (Before COVID), 38% (December 2020)
- Ten Trip: 8% (Before COVID), 10% (December 2020)
- One-Way: 35% (Before COVID), 44% (December 2020)
- Student & Reduced Fare: 8% (Before COVID), 8% (December 2020)

**RAIL - Self-Reported Ticket Types**

- Monthly Pass: 39% (Before COVID), 53% (December 2020)
- Ten Trip/Weekly: 20% (Before COVID), 17% (December 2020)
- One-Way: 12% (Before COVID), 10% (December 2020)
- Reduced Fare: 9% (Before COVID), 9% (December 2020)

**LIGHT RAIL - Self-Reported Ticket Types**

- Monthly Pass: 46% (Before COVID), 33% (December 2020)
- One-Way: 48% (Before COVID), 60% (December 2020)
- Reduced Fare: 6% (Before COVID), 6% (December 2020)

**Ticket Purchase Locations**

- NJ TRANSIT Mobile App: 69% (Before COVID), 71% (December 2020)
- Ticket Vending Machine: 52% (Before COVID), 24% (December 2020)
- NJ TRANSIT ticket agent: 14% (Before COVID), 1% (December 2020)
- On-board: 8% (Before COVID), 9% (December 2020)
- Tickets by mail/Quik-Tik: 0% (Before COVID), 0% (December 2020)

**New NJT Mobile App Users**

- Bus: 23%
- Rail: 14%
- Light Rail: 31%

**Payment Method**

- Personal Credit Card or Debit Card: 61% (Before COVID), 78% (December 2020)
- Cash: 26% (Before COVID), 7% (December 2020)
- Apple Pay/Google Pay/Paypal: 12% (Before COVID), 12% (December 2020)
- Other: 5% (Before COVID), 5% (December 2020)
Departure Times of Customers Traveling to WORK

- 5 to 7AM travel in December is similar to pre-COVID
- 7 to 9AM travel in December is less than pre-COVID
Cleanliness and PPE Vending Machines Satisfaction Scores
December 2020 verses Before COVID (Fall 2019)

Areas for improvement from customers that gave a score of 4 or less

<table>
<thead>
<tr>
<th>Needs Improvement</th>
<th>Bus</th>
<th>Rail</th>
<th>Light Rail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Litter</td>
<td>16%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Seats (spills, stains, etc.)</td>
<td>17%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Dirty touchpoints</td>
<td>14%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Spills on the floor</td>
<td>12%</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>Dirty windows</td>
<td>11%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Bathrooms</td>
<td>8%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Overflowing trash bins</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Dirty vending machines</td>
<td>4%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
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Areas for improvement from customers that gave a score of 4 or less

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<td>19%</td>
<td>20%</td>
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<tr>
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<td>3%</td>
<td>12%</td>
<td>2%</td>
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Scores for cleanliness have generally improved since the last customer satisfaction survey in Fall 2019

Litter and seats are areas for improvement

Satisfaction with PPE Vending Machines
7.34
On your last trip on NJ TRANSIT, about how many other customers were wearing face coverings?

- Face covering usage by other customers increased since June.
- About 90 percent or more customers said most, almost all, or all customers were wearing face coverings.
How easy has it been to maintain a safe personal space when . . . ?

### Purchasing a Ticket

- **Bus - North Jersey Local**: June 65%, December 52%
- **Bus - South Jersey**: June 65%, December 65%
- **Bus - NY Interstate**: June 73%, December 64%
- **Rail**: June 78%, December 76%
- **Light Rail**: June 76%, December 65%

### Waiting at the Station/Stop

- **Bus - North Jersey Local**: June 68%, December 63%
- **Bus - South Jersey**: June 71%, December 66%
- **Bus - NY Interstate**: June 71%, December 62%
- **Rail**: June 77%, December 75%
- **Light Rail**: June 72%, December 68%

### Riding on NJ TRANSIT

- **Bus - North Jersey Local**: June 50%, December 50%
- **Bus - South Jersey**: June 62%, December 59%
- **Bus - NY Interstate**: June 60%, December 51%
- **Rail**: June 65%, December 64%
- **Light Rail**: June 64%, December 54%
- **Access Link**: June 43%, December 43%

### Exiting the Station

- **Bus - North Jersey Local**: June 69%, December 68%
- **Bus - South Jersey**: June 78%, December 75%
- **Bus - NY Interstate**: June 74%, December 65%
- **Rail**: June 62%, December 57%
- **Light Rail**: June 66%, December 58%
Essential Workers (Health care, Emergency Management, Food Service, Delivery Drivers, Utilities, Transportation, etc.) remain a major portion of the customers traveling.
WORK TRIPS – Why not Traveling in December 2020

BUS – North Jersey Local
- 14% Working from Home/Remote
- 22% Lost Job/Furloughed
- 22% Other
- 63% Other

BUS – South Jersey
- 22% Working from Home/Remote
- 36% Lost Job/Furloughed
- 43% Other

BUS – NY Interstate
- 5% Working from Home/Remote
- 12% Lost Job/Furloughed
- 83% Other

RAIL
- 8% Working from Home/Remote
- 12% Lost Job/Furloughed
- 88% Other

LIGHT RAIL
- 12% Working from Home/Remote
- 7% Lost Job/Furloughed
- 81% Other

ACCESS LINK
- 26% Working from Home/Remote
- 40% Lost Job/Furloughed
- 34% Other
Customers working from home were asked, if they had to go to the office in the next week, how would they travel there.

The percent of customers that would travel by the same mode decreased compared to June.

It is important to note, that when this survey was conducted the second wave had begun.
Once government guidance allows and business start reopening, if it was up to you, when would you prefer to go back to your work site?

Has your employer set a date for worksite return?

- Roughly a quarter to a third of customers working from home preferred to return to the worksite in December.
- Around 15-20 percent are not comfortable returning at all.
- About 20-25 percent want to return in the late Spring/Summer of 2021.

About 45-55 percent of NY Interstate Bus and Rail customers (purple bars) said their employers set a late spring/summer return date.

Roughly a quarter to a third of customers working from home preferred to return to the worksite in December.

Around 15-20 percent are not comfortable returning at all.

About 20-25 percent want to return in the late Spring/Summer of 2021.
When you start riding NJT again, will you ride more, less or about the same as before COVID? *If less often, what are the main reasons?*

### BUS–North Jersey Local
- More Often: 49%
- Less Often: 39%
- About the Same: 12%

### BUS–South Jersey
- More Often: 57%
- Less Often: 30%
- About the Same: 13%

### ACCESS LINK
- More Often: 64%
- Less Often: 18%
- About the Same: 18%

**Top 5 Reasons Why Customer Expects to Ride NJ TRANSIT less in the Future**

1. Working from home/remotely more often: 18%
2. Not comfortable riding because of COVID: 23%
3. Traveling a different way: 11%
4. Fewer reasons to ride (cancelled events, closures): 9%
5. Not comfortable riding public transportation ever again: 8%
When you start riding NJT again, will you ride more, less or about the same as before COVID? If less often, what are the main reasons?

**Top 5 Reasons Why Customer Expects to Ride NJ TRANSIT less in the Future**

**BUS–NY Interstate**
- More Often: 46%
- Less Often: 5%
- About the Same: 49%

**RAIL**
- More Often: 48%
- Less Often: 4%
- About the Same: 47%

**LIGHT RAIL**
- More Often: 49%
- Less Often: 8%
- About the Same: 44%

- Working from home/remotely more often: 34%
- Not comfortable riding because of COVID: 22%
- Traveling a different way: 6%
- Fewer reasons to ride (cancelled events, closures): 9%
- Not comfortable riding public transportation ever again: 6%

- Working from home/remotely more often: 32%
- Not comfortable riding because of COVID: 22%
- Traveling a different way: 8%
- Fewer reasons to ride (cancelled events, closures): 12%
- Not comfortable riding public transportation ever again: 5%

- Working from home/remotely more often: 28%
- Not comfortable riding because of COVID: 23%
- Traveling a different way: 9%
- Fewer reasons to ride (cancelled events, closures): 11%
- Not comfortable riding public transportation ever again: 6%
### WORK TRIPS: How many days did you or do you expect to . . .?

<table>
<thead>
<tr>
<th>Mode</th>
<th>Before COVID</th>
<th>December 2020</th>
<th>After the COVID crisis is over</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BUS – North Jersey Local</strong></td>
<td>5.2</td>
<td>5.1</td>
<td>4.9</td>
</tr>
<tr>
<td>At Worksite</td>
<td>4.0</td>
<td>4.3</td>
<td>4.9</td>
</tr>
<tr>
<td>Home/Remote</td>
<td>1.9</td>
<td>1.2</td>
<td>1.4</td>
</tr>
<tr>
<td>Off From Work</td>
<td>1.8</td>
<td>1.9</td>
<td>2.0</td>
</tr>
</tbody>
</table>

| **BUS – South Jersey** | 0.5          | 0.4            | 0.4                           |
| At Worksite           | 1.7          | 1.7            | 1.9                           |
| Home/Remote           | 1.7          | 1.7            | 1.7                           |
| Off From Work         | 1.7          | 1.7            | 1.7                           |

| **BUS – NY Interstate** | 4.9          | 2.5            | 1.4                           |
| At Worksite           | 4.5          | 1.4            | 2.4                           |
| Home/Remote           | 0.8          | 3.1            | 3.1                           |
| Off From Work         | 1.9          | 2.0            | 1.9                           |

| **RAIL**              | 4.5          | 4.5            | 4.5                           |
| At Worksite           | 4.9          | 4.9            | 4.9                           |
| Home/Remote           | 0.5          | 0.5            | 0.5                           |
| Off From Work         | 1.8          | 1.8            | 1.8                           |

| **LIGHT RAIL**        | 4.5          | 4.5            | 4.5                           |
| At Worksite           | 4.5          | 4.5            | 4.5                           |
| Home/Remote           | 0.5          | 0.5            | 0.5                           |
| Off From Work         | 2.4          | 2.4            | 2.4                           |

| **ACCESS LINK**       | 4.5          | 3.3            | 4.4                           |
| At Worksite           | 4.5          | 4.5            | 4.4                           |
| Home/Remote           | 1.8          | 1.8            | 0.8                           |
| Off From Work         | 2.7          | 2.7            | 2.3                           |
Overall Satisfaction with NJ TRANSIT

OVERALL SATISFACTION

<table>
<thead>
<tr>
<th>Service Type</th>
<th>November 2019</th>
<th>June</th>
<th>December</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUS - NORTH JERSEY LOCAL</td>
<td>6.5</td>
<td>6.8</td>
<td>6.5</td>
</tr>
<tr>
<td>BUS - SOUTH JERSEY</td>
<td>7.1</td>
<td>7.0</td>
<td>6.8</td>
</tr>
<tr>
<td>BUS - NEW YORK INTERSTATE</td>
<td>5.7</td>
<td>7.2</td>
<td>6.9</td>
</tr>
<tr>
<td>RAIL</td>
<td>5.1</td>
<td>6.9</td>
<td>7.0</td>
</tr>
<tr>
<td>LIGHT RAIL</td>
<td>6.6</td>
<td>7.1</td>
<td>6.5</td>
</tr>
<tr>
<td>ACCESS LINK</td>
<td>7.4</td>
<td>7.9</td>
<td>8.3</td>
</tr>
</tbody>
</table>
COVID Travel Survey #3 – Next Steps

- Share results with senior management, operating groups, pandemic planning groups, Board Customer Service Committee, etc.
- Next COVID Travel Survey, possibly in the spring
- Next Customer Satisfaction possibly in the fall