COVID Travel Survey #5

Conducted October 25th to November 24, 2021

Survey Findings
COVID TRAVEL Survey #5

Background Information

COVID Travel Survey #5 – October 25 – November 24, 2021 (before Omicron)

- Nearly 38,000 usable surveys were received
- Survey included questions about:
  - Travel before COVID – NJT mode and trip purpose used most often
  - Current travel, cleanliness, personal space and face coverings
  - Reason for not traveling by NJ TRANSIT
  - Return to work questions
  - Changes to home or work location since COVID
  - Importance of factors in the decision to take NJ TRANSIT
  - Demographics

Prior surveys were conducted during the following time periods:
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
COVID Travel Survey #4 – June 8 -25, 2021
The percent of customers making at least one work trip since June 2021 has increased, with the greatest increases the New York markets.

The percent of customers making non-work trips has remained consistent.

Note: the “mode” is the mode used by the customer before COVID
The percent of customers traveling to work by the same NJ TRANSIT mode they used before COVID has increased for the NY bus and rail and Access Link markets and has remained the essentially the same for other local bus and light rail markets.
Concerns about COVID, travel times and changes to job/work locations were the top reasons why respondents said they didn’t take the NJ TRANSIT mode they used before COVID.
Customer’s satisfaction with cleanliness at NJ TRANSIT stations and stops and onboard NJ TRANSIT vehicles remains higher than before COVID.
Customer’s satisfaction with the PPE vending machines has decreased slightly since the June 2021 survey.
On your last trip on NJ TRANSIT, about how many other customers were wearing face coverings on board and inside stations?

- Over 90 percent or more respondents said most, almost all, or all customers were wearing face coverings on all mode except for Light Rail.
How easy has it been to maintain a safe personal space when . . . ?

Purchasing a Ticket

- June 2021: 87% Easy or Very Easy, 13% Not Easy but not Hard
- Nov. 2021: 84% Easy or Very Easy, 16% Not Easy but not Hard
- June 2021: 91% Easy or Very Easy, 9% Not Easy but not Hard
- Nov. 2021: 90% Easy or Very Easy, 10% Not Easy but not Hard
- June 2021: 92% Easy or Very Easy, 8% Not Easy but not Hard
- Nov. 2021: 86% Easy or Very Easy, 14% Not Easy but not Hard
- June 2021: 95% Easy or Very Easy, 5% Not Easy but not Hard
- Nov. 2021: 93% Easy or Very Easy, 7% Not Easy but not Hard
- June 2021: 88% Easy or Very Easy, 12% Not Easy but not Hard
- Nov. 2021: 88% Easy or Very Easy, 12% Not Easy but not Hard

Waiting at the Station/Stop

- June 2021: 90% Easy or Very Easy, 10% Not Easy but not Hard
- Nov. 2021: 88% Easy or Very Easy, 12% Not Easy but not Hard
- June 2021: 92% Easy or Very Easy, 8% Not Easy but not Hard
- Nov. 2021: 90% Easy or Very Easy, 10% Not Easy but not Hard
- June 2021: 89% Easy or Very Easy, 11% Not Easy but not Hard
- Nov. 2021: 84% Easy or Very Easy, 16% Not Easy but not Hard
- June 2021: 94% Easy or Very Easy, 6% Not Easy but not Hard
- Nov. 2021: 92% Easy or Very Easy, 8% Not Easy but not Hard
- June 2021: 92% Easy or Very Easy, 8% Not Easy but not Hard
- Nov. 2021: 91% Easy or Very Easy, 9% Not Easy but not Hard

Riding on NJ TRANSIT

- June 2021: 85% Easy or Very Easy, 15% Not Easy but not Hard
- Nov. 2021: 80% Easy or Very Easy, 20% Not Easy but not Hard
- June 2021: 89% Easy or Very Easy, 11% Not Easy but not Hard
- Nov. 2021: 90% Easy or Very Easy, 10% Not Easy but not Hard
- June 2021: 84% Easy or Very Easy, 16% Not Easy but not Hard
- Nov. 2021: 73% Easy or Very Easy, 27% Not Easy but not Hard
- June 2021: 91% Easy or Very Easy, 9% Not Easy but not Hard
- Nov. 2021: 84% Easy or Very Easy, 16% Not Easy but not Hard
- June 2021: 83% Easy or Very Easy, 17% Not Easy but not Hard
- Nov. 2021: 74% Easy or Very Easy, 26% Not Easy but not Hard
- June 2021: 91% Easy or Very Easy, 9% Not Easy but not Hard
- Nov. 2021: 92% Easy or Very Easy, 8% Not Easy but not Hard

Exiting the Station

- June 2021: 93% Easy or Very Easy, 7% Not Easy but not Hard
- Nov. 2021: 92% Easy or Very Easy, 8% Not Easy but not Hard
- June 2021: 94% Easy or Very Easy, 6% Not Easy but not Hard
- Nov. 2021: 93% Easy or Very Easy, 7% Not Easy but not Hard
- June 2021: 89% Easy or Very Easy, 11% Not Easy but not Hard
- Nov. 2021: 77% Easy or Very Easy, 23% Not Easy but not Hard
- June 2021: 79% Easy or Very Easy, 21% Not Easy but not Hard
- Nov. 2021: 71% Easy or Very Easy, 29% Not Easy but not Hard
- June 2021: 85% Easy or Very Easy, 15% Not Easy but not Hard
- Nov. 2021: 82% Easy or Very Easy, 18% Not Easy but not Hard
Return to the Office/Worksite – NY Markets
(Note: surveys were conducted in November 2021 – before the Omicron variant)

EMPLOYEE’s Return to Work PREFERENCE
Base: customers that took NJT to Work before COVID and are working from home/remote

The preference for when NY Bus and Rail customers return to work responses are almost identical with 23% wanting to return in Jan-March 2022

About 71% of the employers of NY Interstate customers & 75% of Rail customers employers have a January-March 2022 return to work date

EMPLOYER’s set Return to Work Date
Base: customers that took NJT to Work before COVID and their employer set a return to work date

50% have no set return to work date
# of Days at the Office/Worksite

- **North and South Jersey Local Bus customer** – Almost 5 days a week
- **NY Interstate Bus** – almost 4 days a week
- **Rail** – a little more than 3 days a week
- **Light Rail** – nearly 4 days a week
Customers Not Riding – How often do you expect to ride when you return to NJ TRANSIT

When your start riding NJ TRANSIT again, do you think you will ride more often, less often or about the same as before COVID?

Why will you be riding less?

- WORK CHANGES 30%
  - Working from home/ remotely more often, 20%
  - Laid off/ Furloughed/ Reduced Hours/ Retired, 5%
  - Changed jobs and/or work locations, 5%

- TRANSIT SERVICE 27%
  - Too crowded, 5%
  - Not frequent enough, 4%
  - Not clean, 3%
  - Too costly, 2%
  - Too many transfers/ not direct, 2%

- PERSONAL SAFETY 16%
  - Unreliable/ Delays, 5%
  - Too slow, 3%
  - Doesn’t run late enough, 2%
  - Doesn’t run early enough, 1%
  - Too many transfers/ not direct, 3%

- FEWER REASONS TO RIDE 12%
  - Concerns about COVID-19, 11%
  - Concerns about crime or harassment, 5%
  - Cancelled events, closures, changes in personal situation, 12%

- TRAVEL CHANGES 7%
  - I’m traveling a different way, 7%

- PERSONAL CHANGES 6%
  - Moved or Health Issues, 6%

- SCHOOL CHANGES 2%
  - Graduated/ Left School, 2%

Respondents: Customers that Have Not taken NJT in last 7 days

Respondents: the 36% of customers that had not taken NJ TRANSIT in the last 7 days AND said they would ride less in the future
Importance of Factors in your Decision to Ride NJ TRANSIT

The Top Factors are:

- On Time Performance 99%
- Vehicles are Clean 98%
- Safe from Crime & Harassment 98%
- Travel Time 97%
- Morning & Evening Schedule 95%
How Safe Do You Consider Public Transportation?

- Nearly 70% of customers feel taking public transit is safe or very safe.
- 77% of customers feel working in an office is safe or very safe.
- For most activities, the percentage of customers that felt they were safe has declined since the June 2021 survey; however, the percentages for taking public transit, working in an office and flying in a plane have remained the same.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Very Safe/Safe</th>
<th>Very Unsafe/Unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining OUTSIDE at a restaurant</td>
<td>90%</td>
<td>10%</td>
</tr>
<tr>
<td>Working in an office</td>
<td>77%</td>
<td>23%</td>
</tr>
<tr>
<td>Going to a museum or art gallery</td>
<td>76%</td>
<td>24%</td>
</tr>
<tr>
<td>Going to school</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Shopping in a mall</td>
<td>70%</td>
<td>30%</td>
</tr>
<tr>
<td>Taking public transit</td>
<td>69%</td>
<td>31%</td>
</tr>
<tr>
<td>Dining INSIDE at a restaurant</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Traveling on a plane</td>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>Going to a Gym or Fitness Center</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>Attending a professional sporting...</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Attending gatherings of 100 or...</td>
<td>38%</td>
<td>62%</td>
</tr>
</tbody>
</table>

Change in Safe/Very Safe since June 2021

XX%
Overall Satisfaction and Likelihood to Recommend NJ TRANSIT

**OVERALL SATISFACTION**

- **Base:** November 2019 Customer Satisfaction Survey all respondents
- **June 2021 and November 2021 COVID Travel Survey all respondents**

**How Likely are you to Recommend NJ TRANSIT**

- **BUS - NORTH JERSEY LOCAL**
  - NOVEMBER 2019 (Before COVID): 79%
  - JUNE 2021: 78%
  - NOVEMBER 2021: 77%
- **BUS - SOUTH JERSEY**
  - NOVEMBER 2019 (Before COVID): 83%
  - JUNE 2021: 78%
  - NOVEMBER 2021: 75%
- **BUS - NEW YORK INTERSTATE**
  - NOVEMBER 2019 (Before COVID): 70%
  - JUNE 2021: 78%
  - NOVEMBER 2021: 77%
- **RAIL**
  - NOVEMBER 2019 (Before COVID): 74%
  - JUNE 2021: 74%
  - NOVEMBER 2021: 76%
- **LIGHT RAIL**
  - NOVEMBER 2019 (Before COVID): 80%
  - JUNE 2021: 79%
  - NOVEMBER 2021: 79%
- **ACCESS LINK**
  - NOVEMBER 2019 (Before COVID): 80%
  - JUNE 2021: 80%
  - NOVEMBER 2021: 84%
COVID TRAVEL Survey #5 – Key Takeaways

- Over 90% of respondents said customers were wearing face coverings.

- Cleanliness onboard and in stations scores higher than pre-COVID.

- Over 70% of NY market customers that have a set return-to-office date are expecting to return between Jan-March 2022.

- Despite shifts in riding patterns, 95% of respondents still cited the morning & evening schedules as important factors in deciding to use NJ TRANSIT.
COVID TRAVEL Survey #5 – Next Steps

- Share results with senior management, operating groups, pandemic planning groups, Board Chair and Customer Service Committee, etc.

- Hybrid Customer Satisfaction/COVID Survey Spring 2022