

### **Bus Market Study Results**



# Purpose of Study

- Identify factors that have contributed to declining bus ridership
- Identify *potential* new markets
  - Determine size of potential market
  - Profile bus market segments in terms of demographics and relevant characteristics
  - Identify the types of changes that are likely required to attract new bus riders

# Methodology of Bus Study

Telephone survey with optional online survey

- 1,200 Orange County adults
  - 1000 Random Digit Dialing/Geo-targeted mobile phones
  - 200 Oversample of former riders\*
- Interviews Conducted June 2 to June 25, 2015
- English, Spanish and Vietnamese
- Margin of error +/- 3% overall, +/- 6% former riders

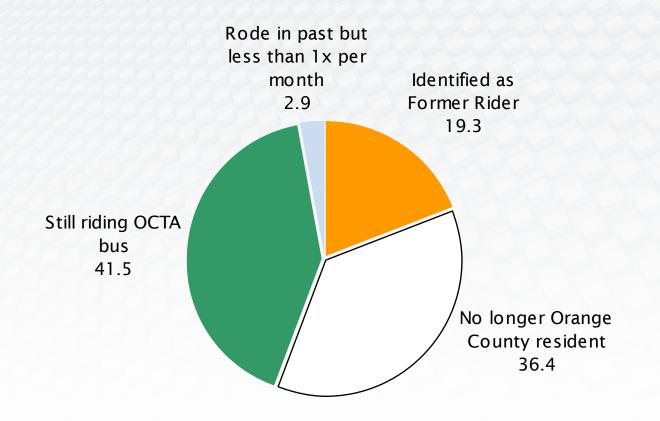
Drawn from 1,037 screening calls to prior On Board Survey participants



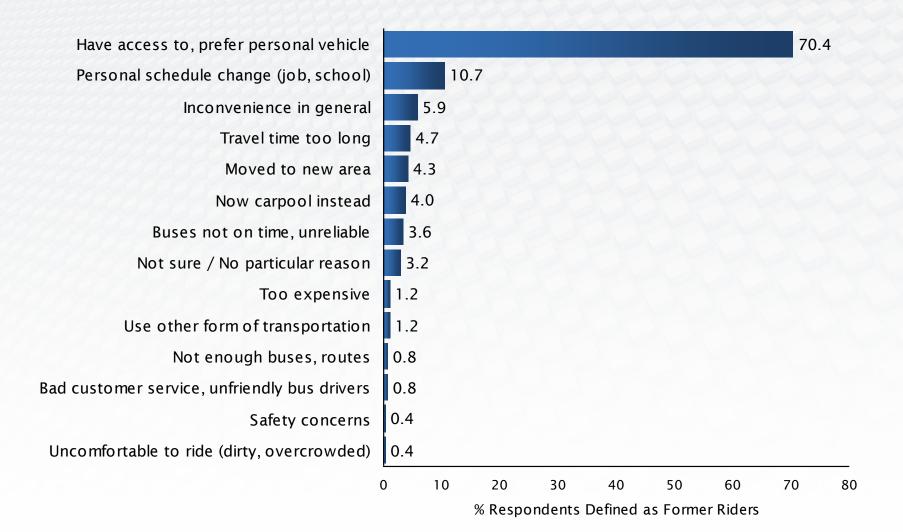
### Why Declining Ridership?



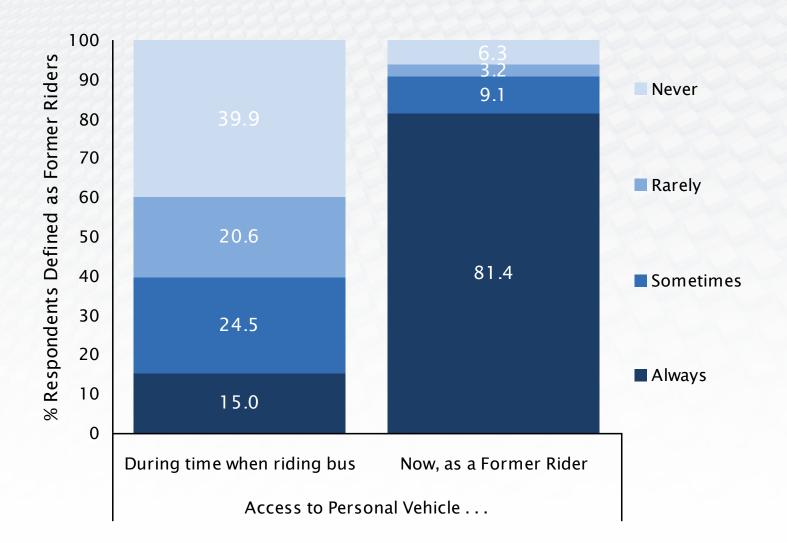
### **Riders Have Moved**



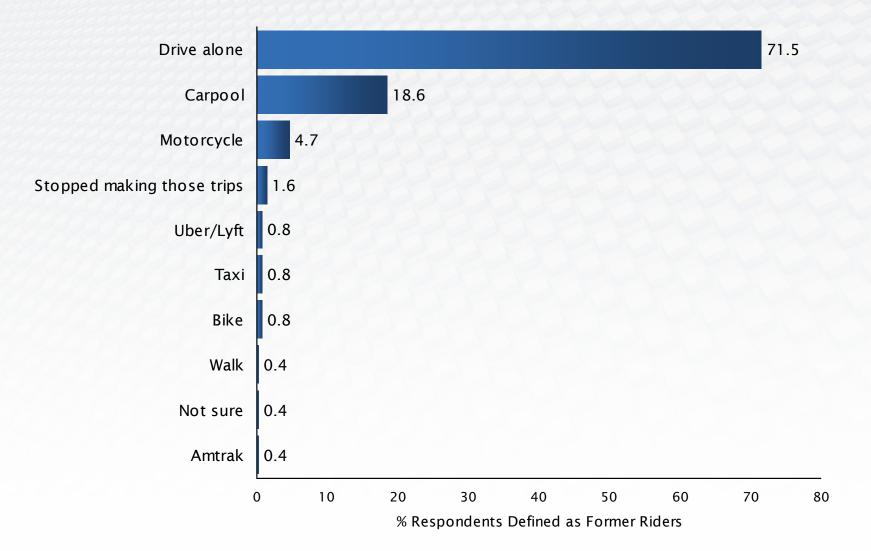
# **Riders Now Have Access to Vehicle**



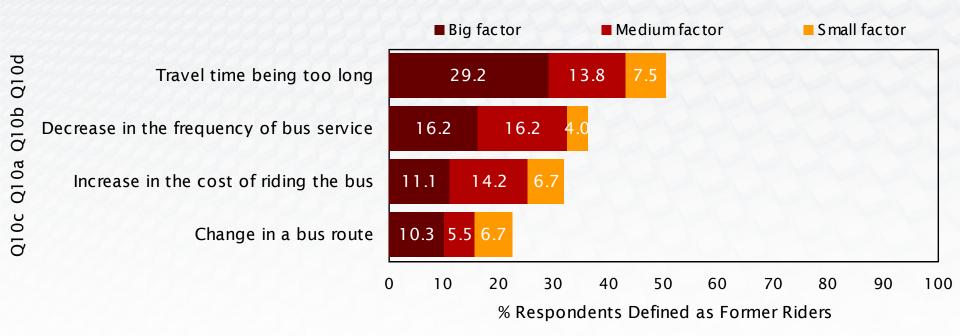
## Change in Vehicle Access



### **Current Trip Mode of Former Bus Riders**



### **Operational Factors**



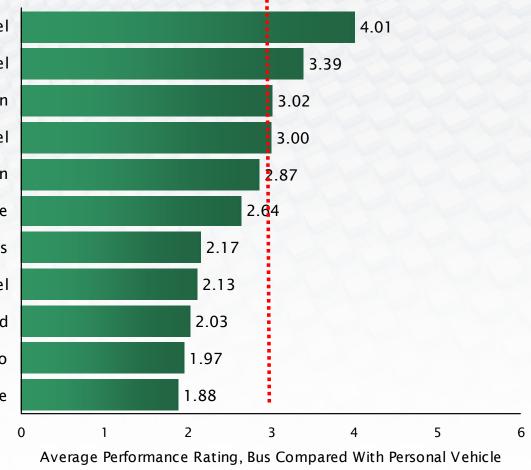


### What is the Potential Market for Bus?



### The Bus Has Competition

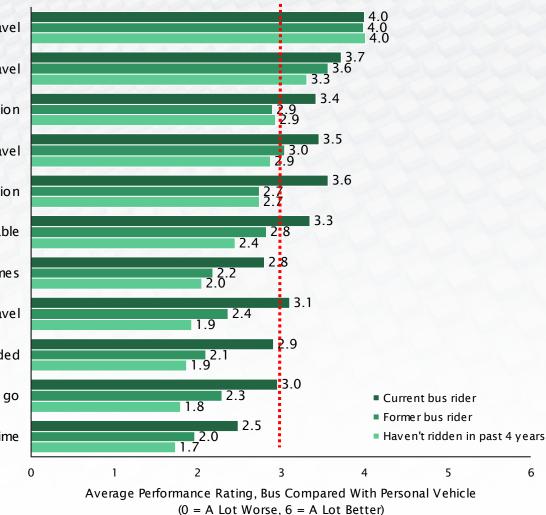
Being an economical way to travel Being a safe way to travel Avoiding traffic congestion Being a stress-free way to travel Being a reliable form of transportation Being clean and comfortable Being consistent in travel times Being a convenient way to travel Being available when needed Going where you need to go Getting to destination in reasonable amount of time



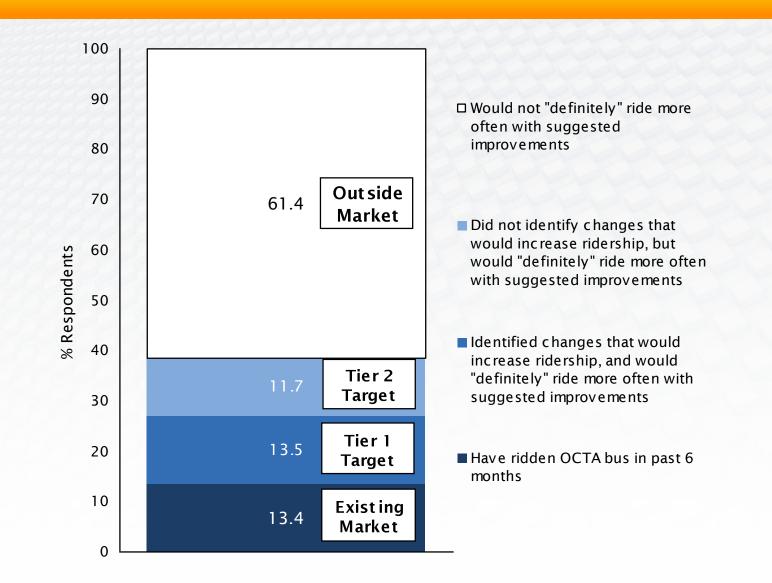
(0 = A Lot Worse, 6 = A Lot Better)

### **Perceptions Matter**

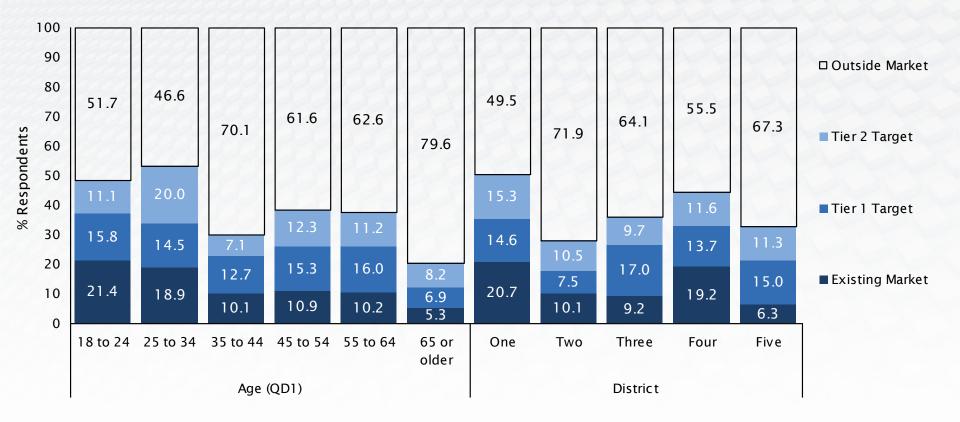
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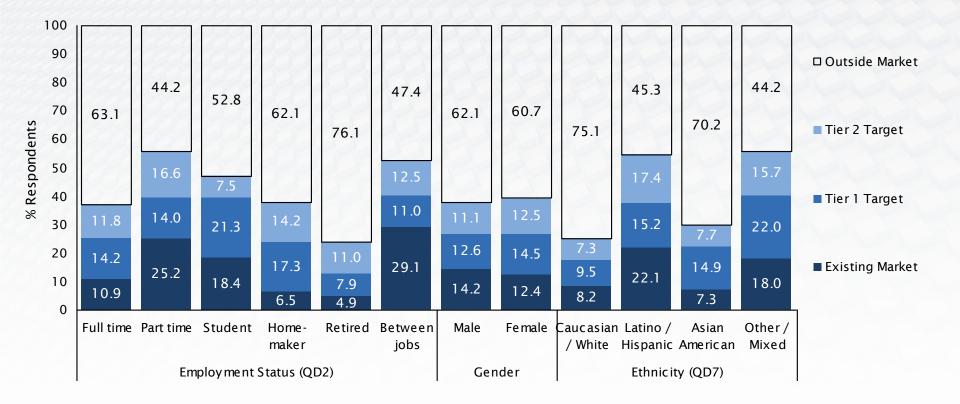
# Potential Ridership Market



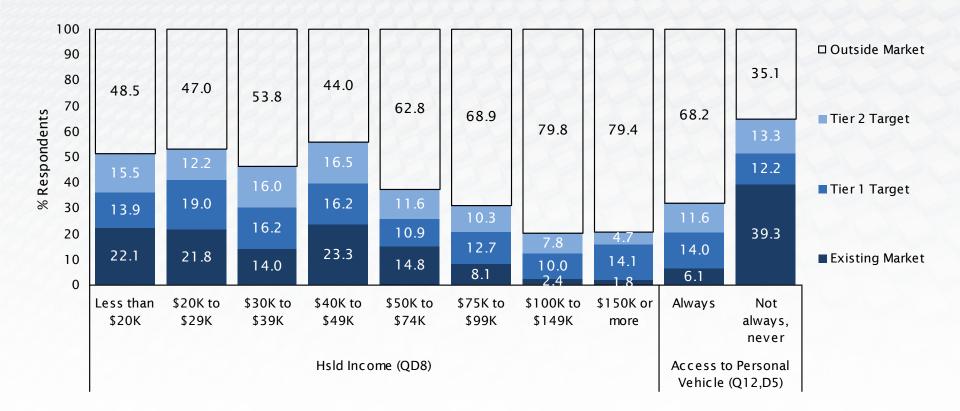
### Propensity to Ride: Age, District



### Propensity to Ride: Employment, Gender, Ethnicity

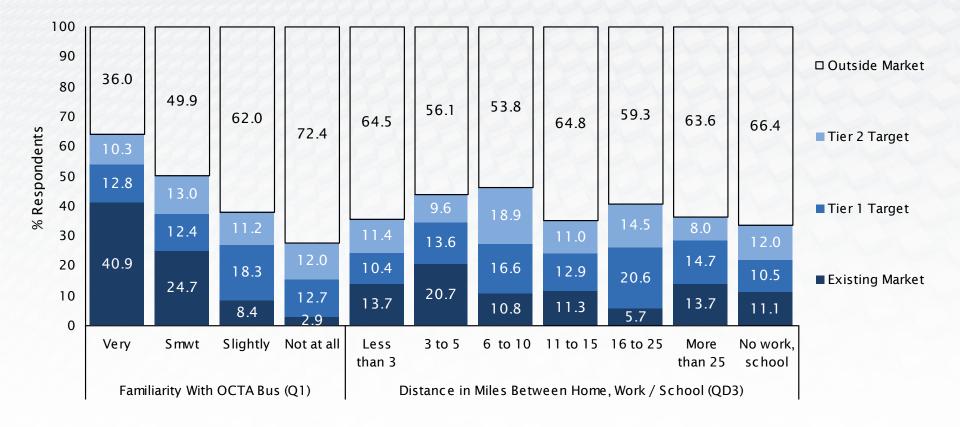


#### Propensity to Ride: Income, Access to Vehicle



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#### Propensity to Ride: Familiarity with OCTA, Trip Distance



# Changes Needed to Ride Bus

No changes / Will not ride more frequently							61.	5
Provide additional buses, frequency		1	3.2	HAY I	CAR A	XX	XX	
Provide additional direct, express routes		9.2						
Provide more stops, closer to origin/destination	5	5.3						
Reduce required travel time	4.	2						
Improve reliability, timeliness	3.0							
Provide more bus, schedule, route info	2.8							
Reduce fares	2.4							
Improve bus comfort, size, amenities	1.8							
Improve bus, bus stop cleanliness	1.4							
Improve customer service, driver courtesy	1.2							
Extend hours of operation	0.9							
Provide designated bus lanes	0.7							
Improve services for seniors, handicapped	0.6							
Improve safety	0.5							
Only if no other mode is available	0.3							
Provide free WiFi	0.2							
	0	10	20	30	40	50	60	70
				% Resno	ndents			

# Impact of Service Changes

	Definit	ely rid	e bus m	nore oft	en	Proba	ably rid	e bus n	nore oft	en
choice	36.6			30.4		X	X	X	5	
sferring	37.1			29.3					Y	
fbuses	30.5		33.7						X	
r stops	29.0			33.7						2
reased	26.1			30.4		2				2
as far	29.7		26.4							
educed	27.5			23.8						1
device	24.7			26.2						
ailable	24.2		Z	26.0						-
ch day	23.4		2	6.7						
tations	20.2		28.2							
helters	21.6		26	26.5						
0	10	20	30	40	50	60	70	80	90	10
				% Re	espond	lents				

Neighborhood bus service to pick you up at a place, time of c You could reach your destinations without transf There was a mobile app with info about timing, status of There were more direct routes with fewer The frequency of bus service was incr Bus stops were closer so you did not have to walk Bus fares were re-You could purchase a ticket with your mobile of WiFi was ava Bus service was provided earlier and later eac There was more free parking available at transit sta Bus stops had improved benches and sh

# Key Findings & Conclusions

### Why has OCTA bus ridership declined?

- Riders have moved out of Orange County
- Dramatic increase in access to personal vehicle
- Bus travel times too long
- Not enough service frequency
- Personal schedule changes
- Failed to attract sufficient new riders to offset losses

## **Potential New Riders**

Greatest propensity to ride:

- Under 35 years of age
- Part-time employees, students, job seekers
- Annual household income under \$50,000
- Those who don't always have access to vehicle
- Commute length 3 to 10 miles

# Key Findings & Conclusions

**To attract ridership**, the performance of the bus needs to improve with respect to *time* and *convenience*.

- Shorter travel times
- More direct routes/express service
- Increased frequency
- Less need for transfers
- Stops closer to origins and destinations
- Demand-response service

### OCTA Action Plan – Product

- Implement Bravo! Route 560 in June 2016
  - Santa Ana Depot to Long Beach
- Introduce faster service through stop consolidation
  - Route 57X October 2015
  - Route 29X, 64X, 53 February 2016
- Increase frequency on high-demand service
  - Conduct route performance analysis
  - Provide recommendations in November
- Research and develop demand-responsive service

# **OCTA Action Plan – Pricing**

- Conduct fare study
- Evaluate pass programs (build frequency)
  - Employer pass
  - Youth pass
  - Multi-day pass
- Develop mobile ticketing apps

# OCTA Action Plan – Promotion

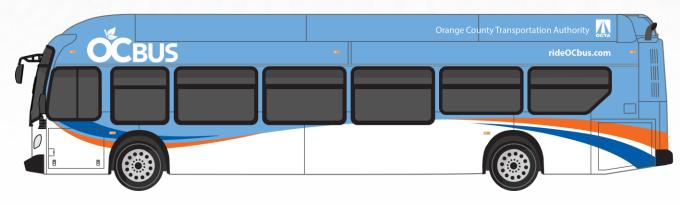
- Launch new OC Bus brand fall 2015
  - Create awareness and enhance perception
  - Educate on simplicity of use (how to ride)

go511.com

rideOCbus.com

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- Market OC Bus features and benefits
- Introduce new branded buses and stop signage - winter 2015



## **OCTA Action Plan – Promotion**

- Conduct route-level marketing
  - Launch Bravo! Route 560
  - Identify and promote best services
- Implement targeted promotion:
  - Students, commuters, new residents, visitors, diverse communities, seniors, current riders
- Promote use of bus passes vs. paying cash

# OCTA Action Plan – Place

- Enhance and promote use of real-time bus information including bus schedules, detours and alerts
  - Mobile Applications (Apps)
  - Texting
  - Website
  - Email
  - Social Media

### **Next Steps**

### Sept. 2015

 Present OC Bus Awareness and Ridership Marketing Campaign

Nov. 2015

- Present Short Range Transit Plan