

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

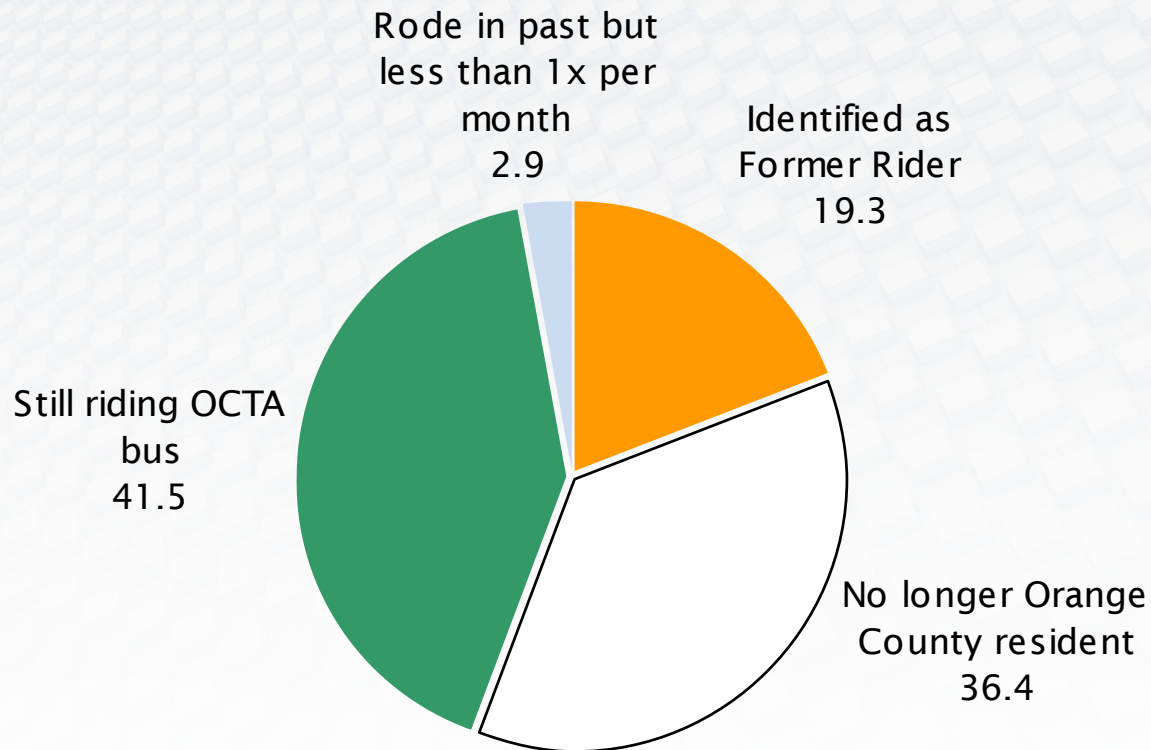
Methodology of Bus Study

- 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

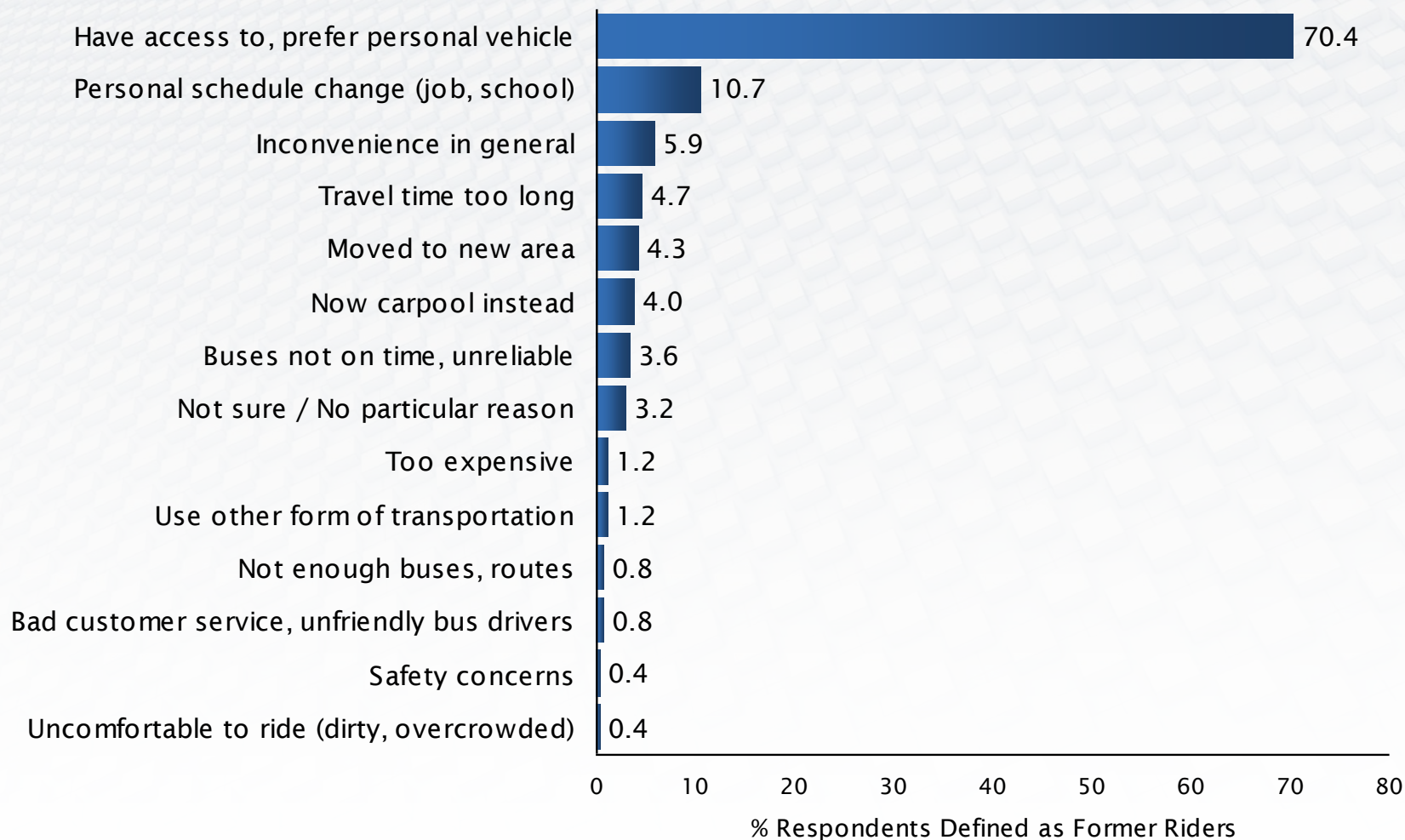
* Drawn from 1,037 screening calls to prior On Board Survey participants

Why Declining Ridership?

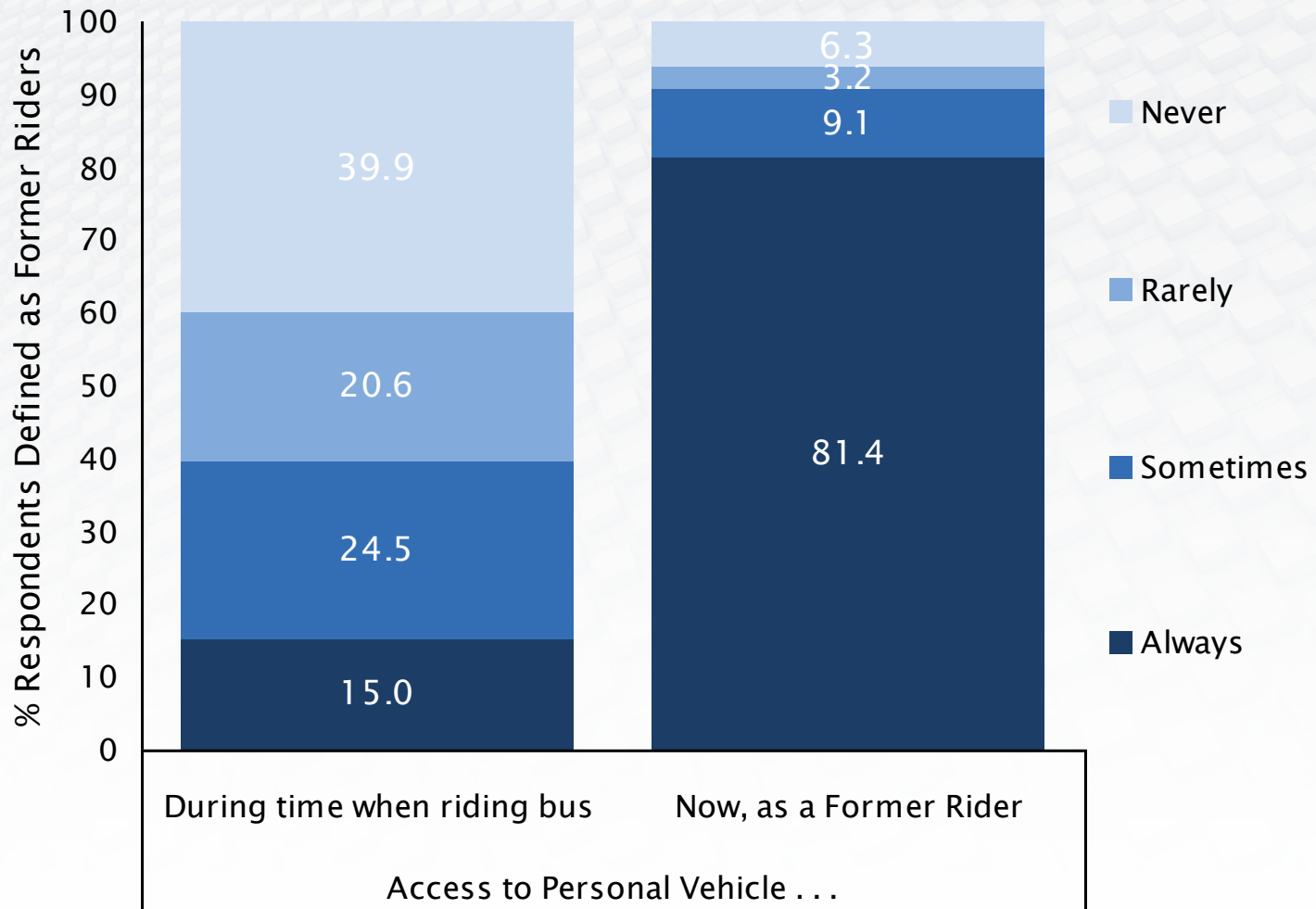
Riders Have Moved



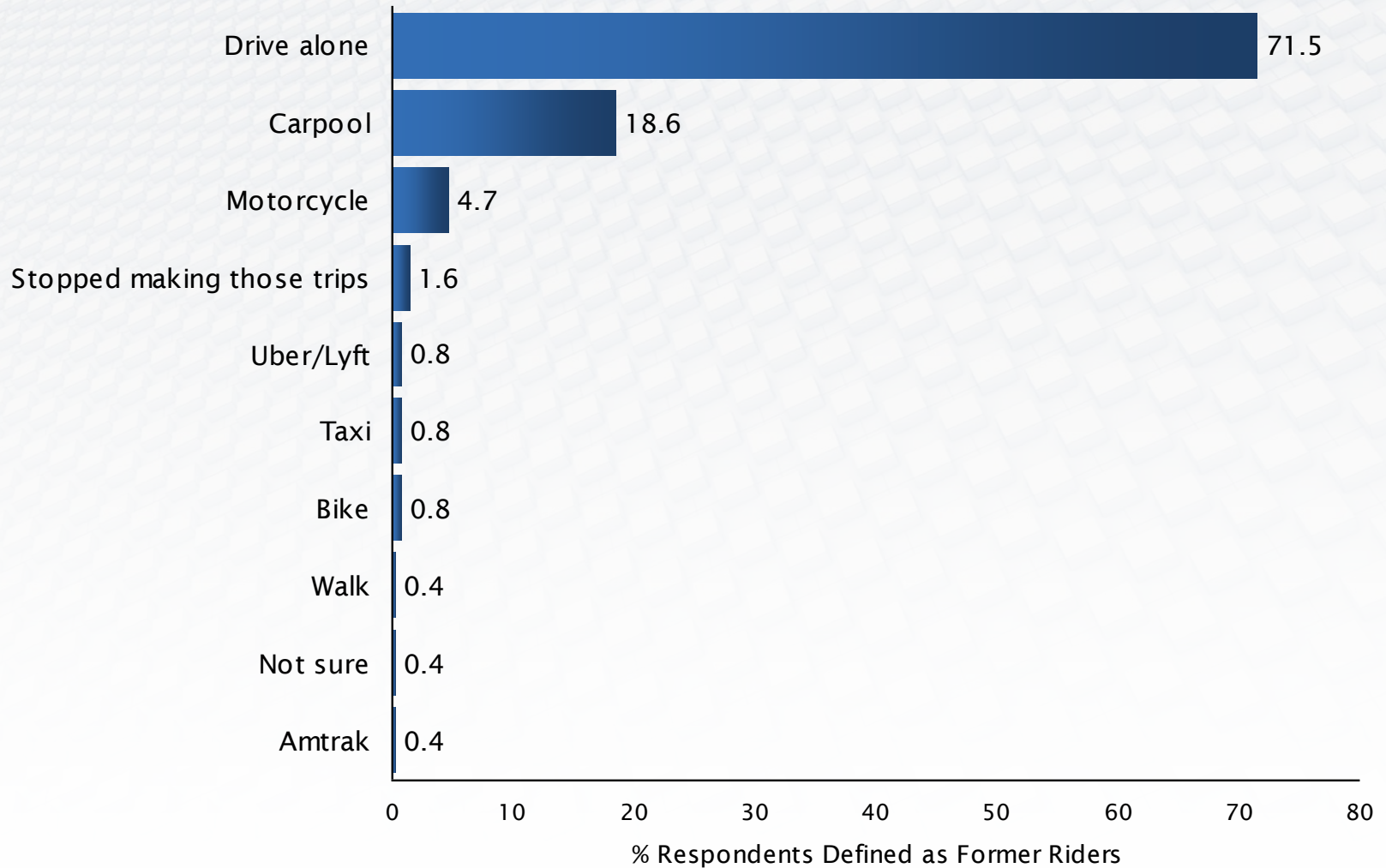
Riders Now Have Access to Vehicle



Change in Vehicle Access

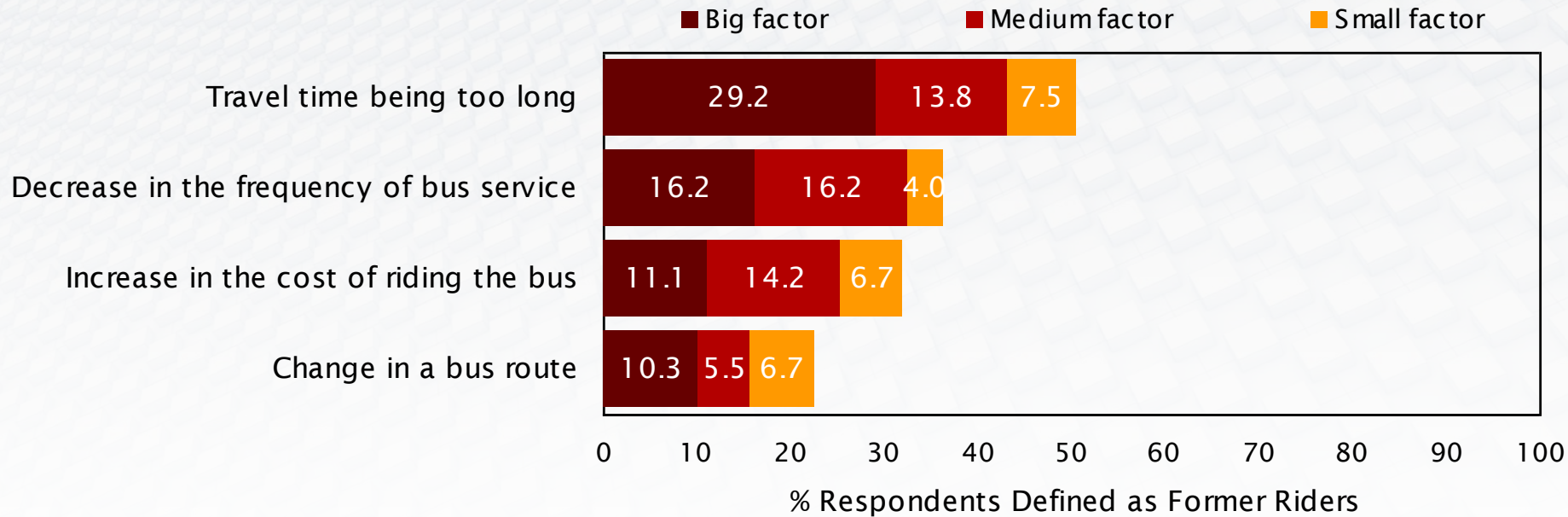


Current Trip Mode of Former Bus Riders



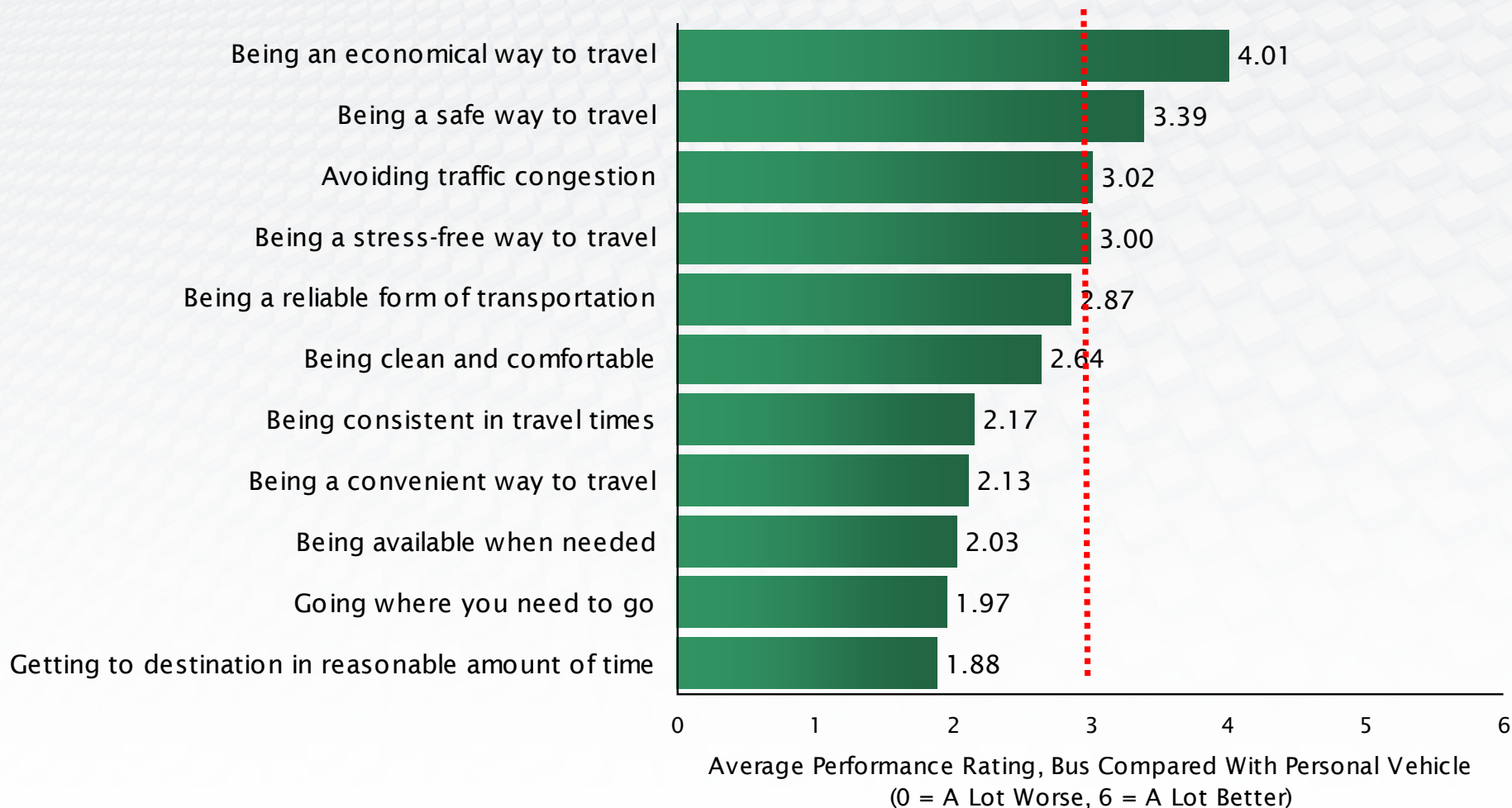
Operational Factors

Q10c Q10a Q10b Q10d

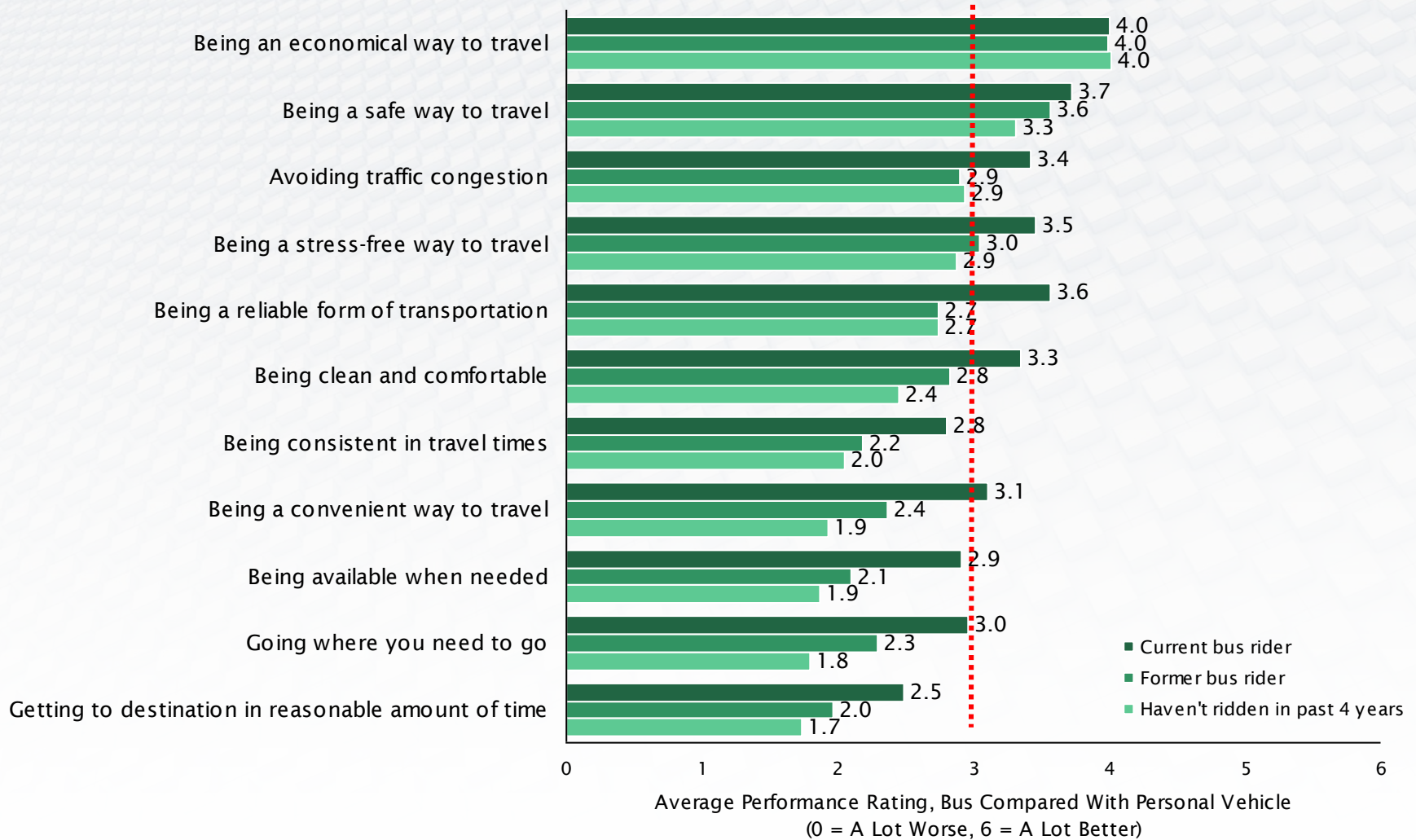


What is the Potential Market for Bus?

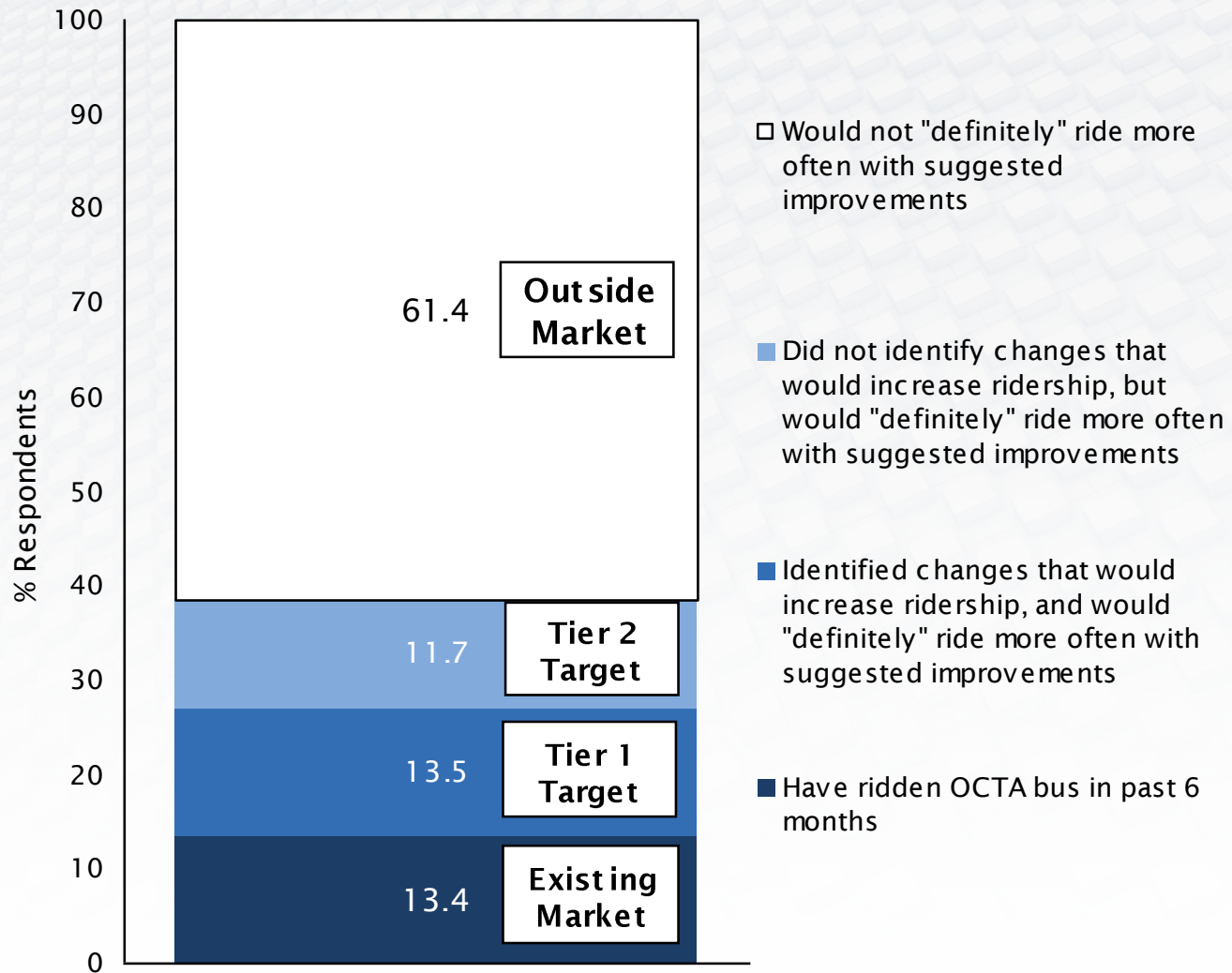
The Bus Has Competition



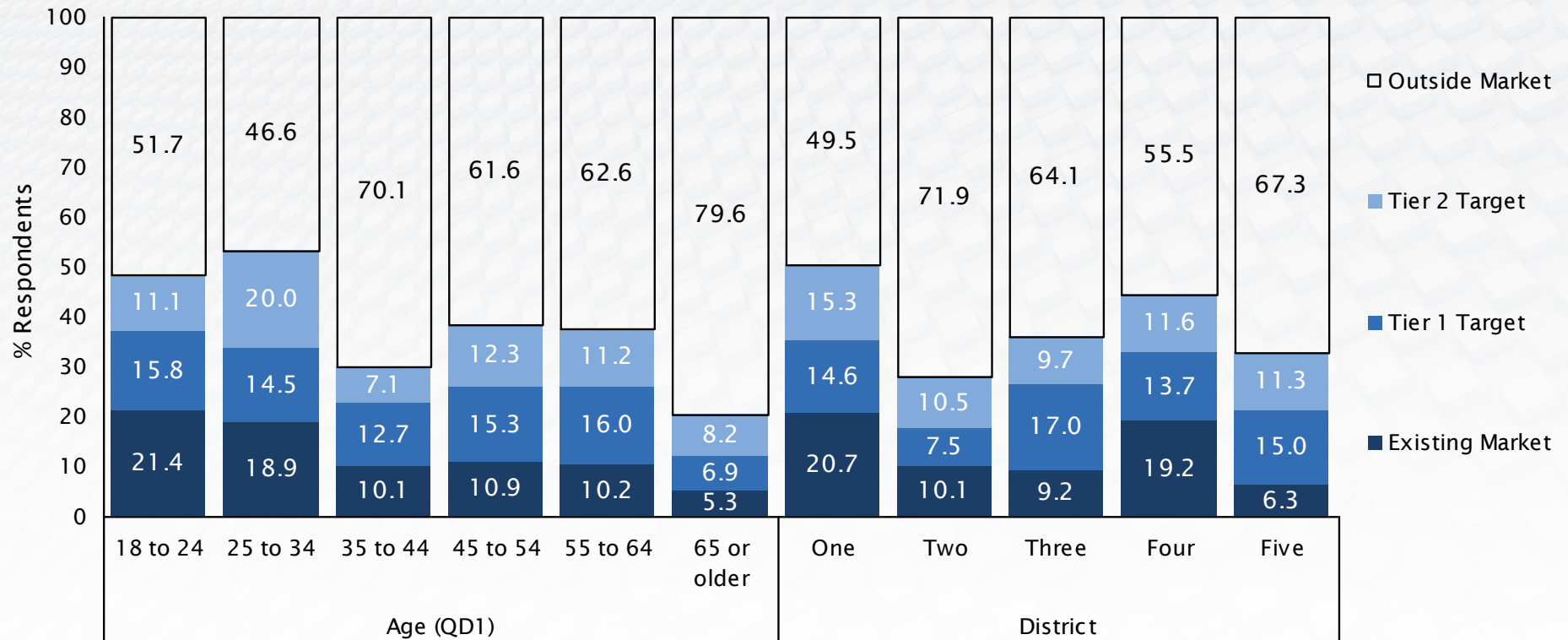
Perceptions Matter



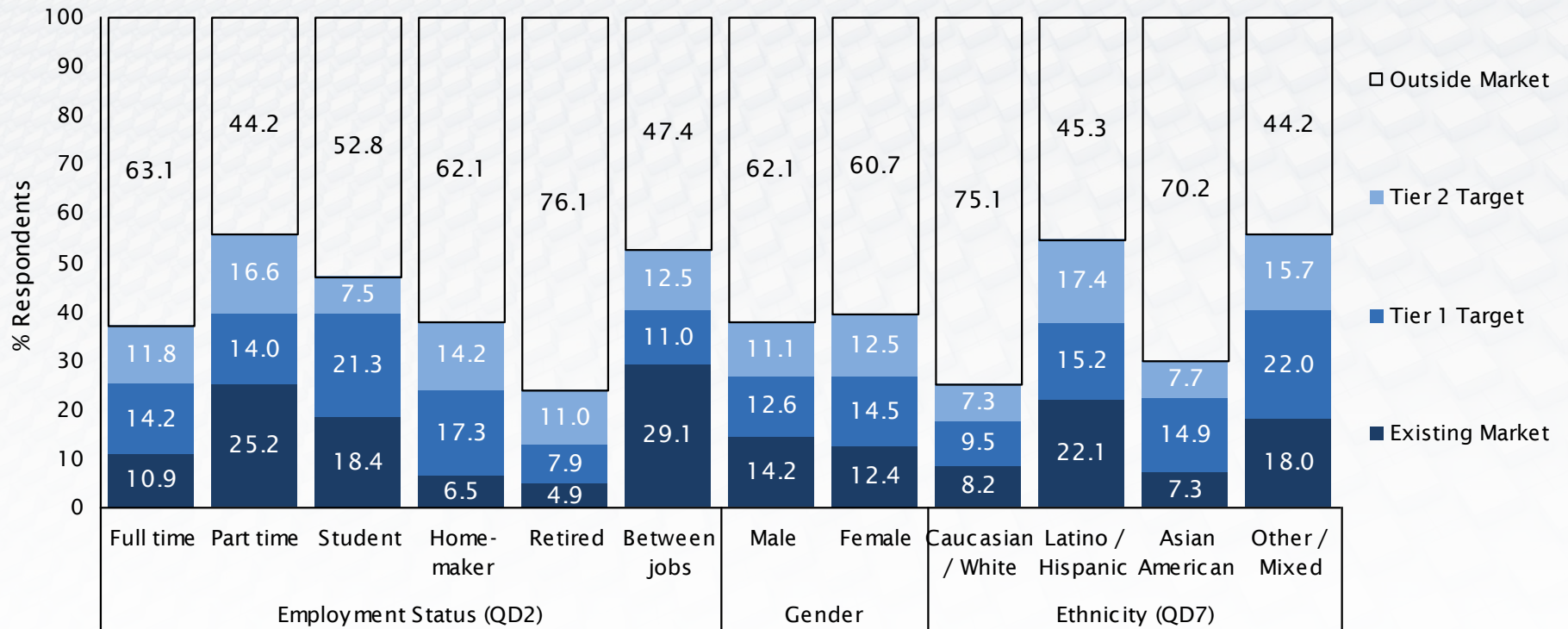
Potential Ridership Market



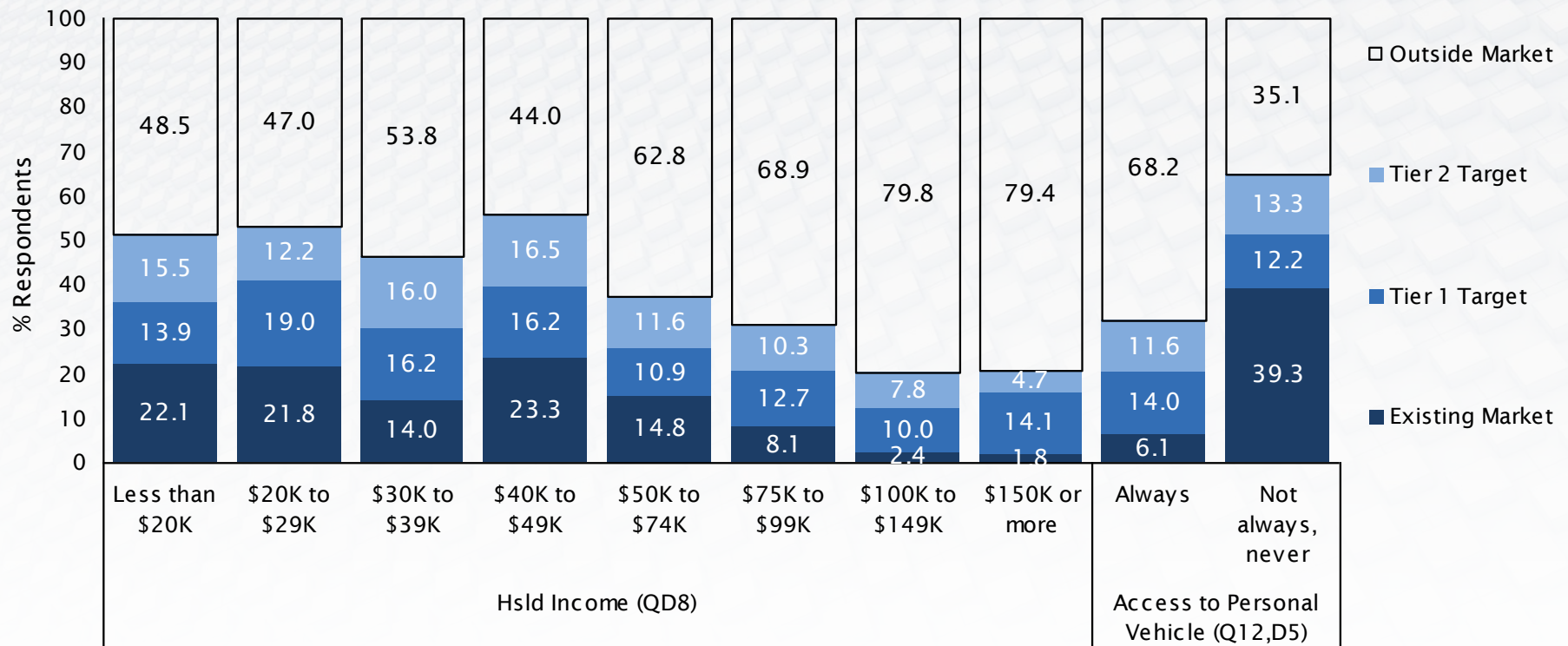
Propensity to Ride: Age, District



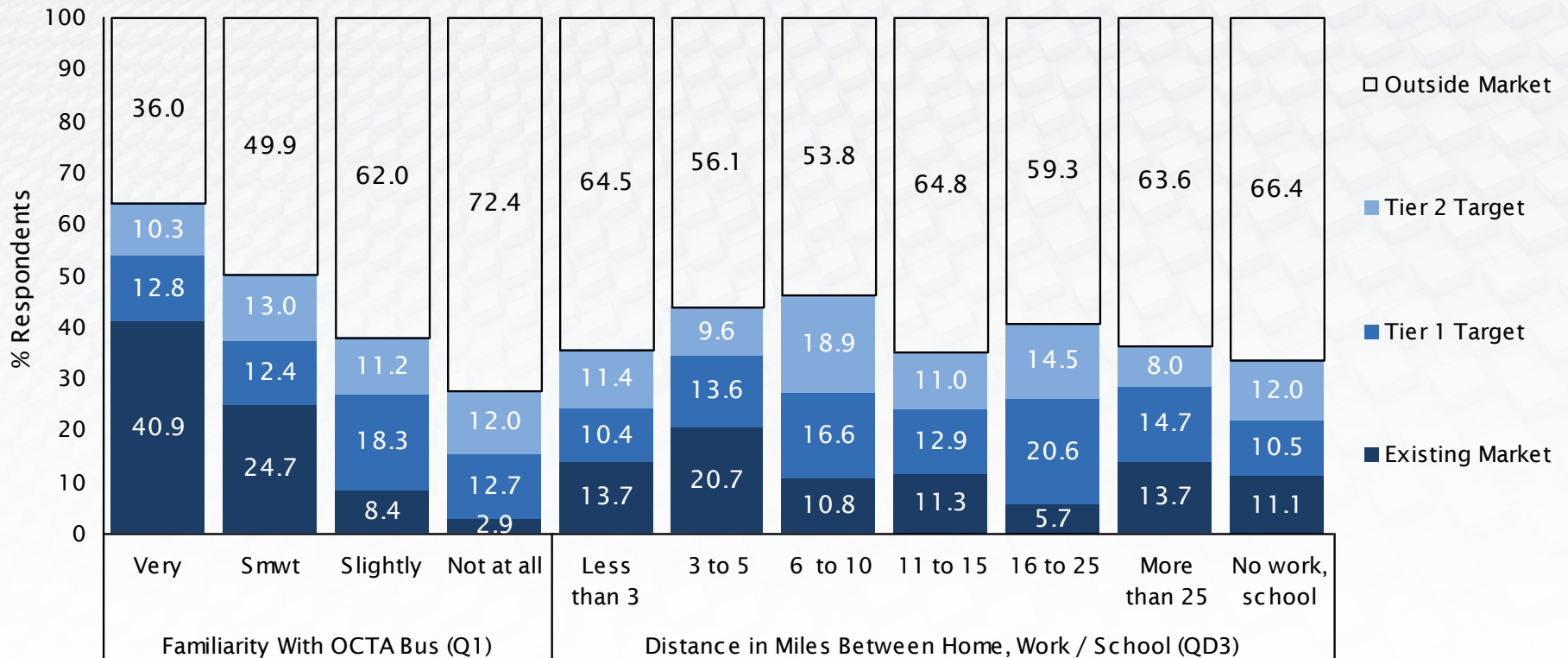
Propensity to Ride: Employment, Gender, Ethnicity



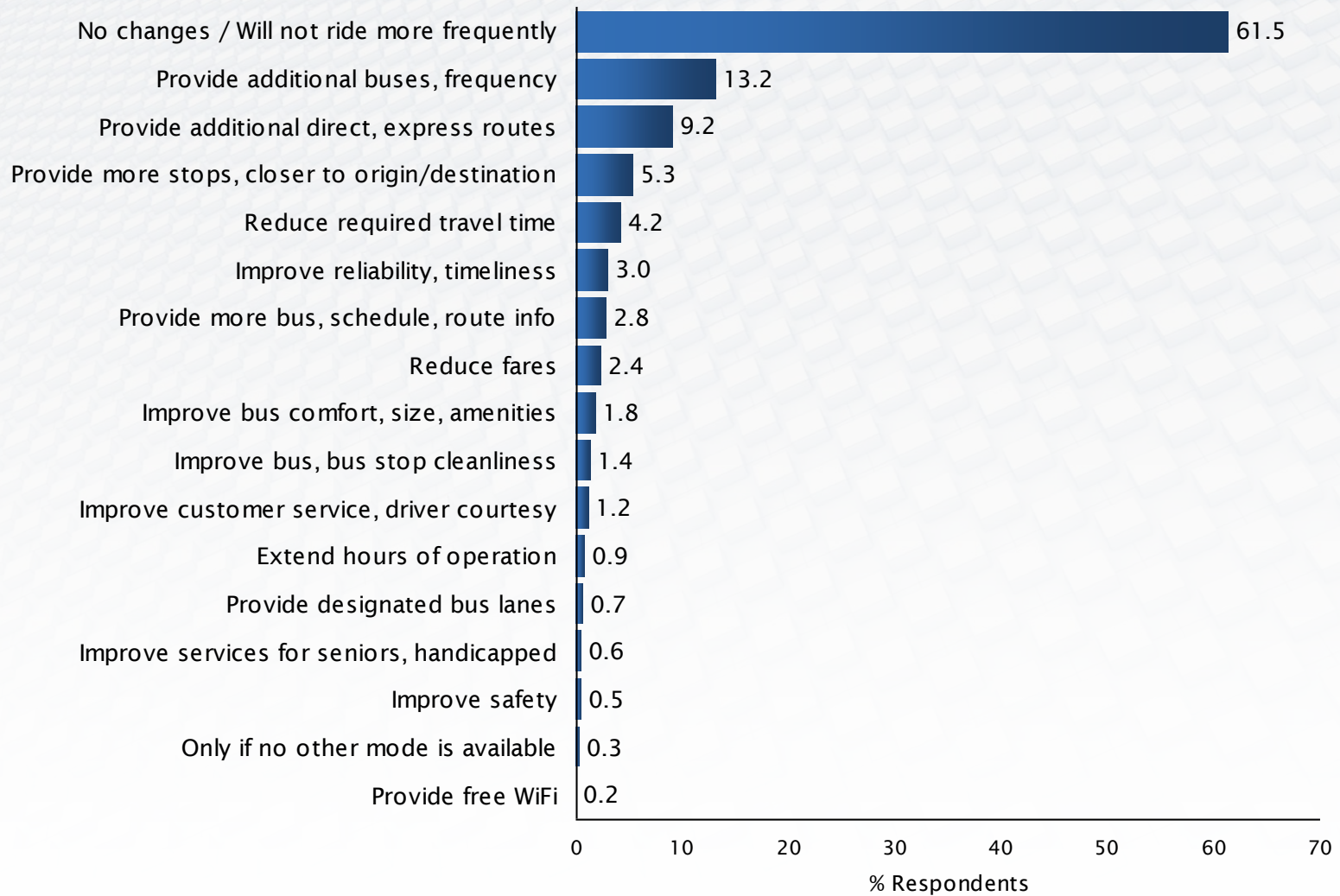
Propensity to Ride: Income, Access to Vehicle



Propensity to Ride: Familiarity with OCTA, Trip Distance

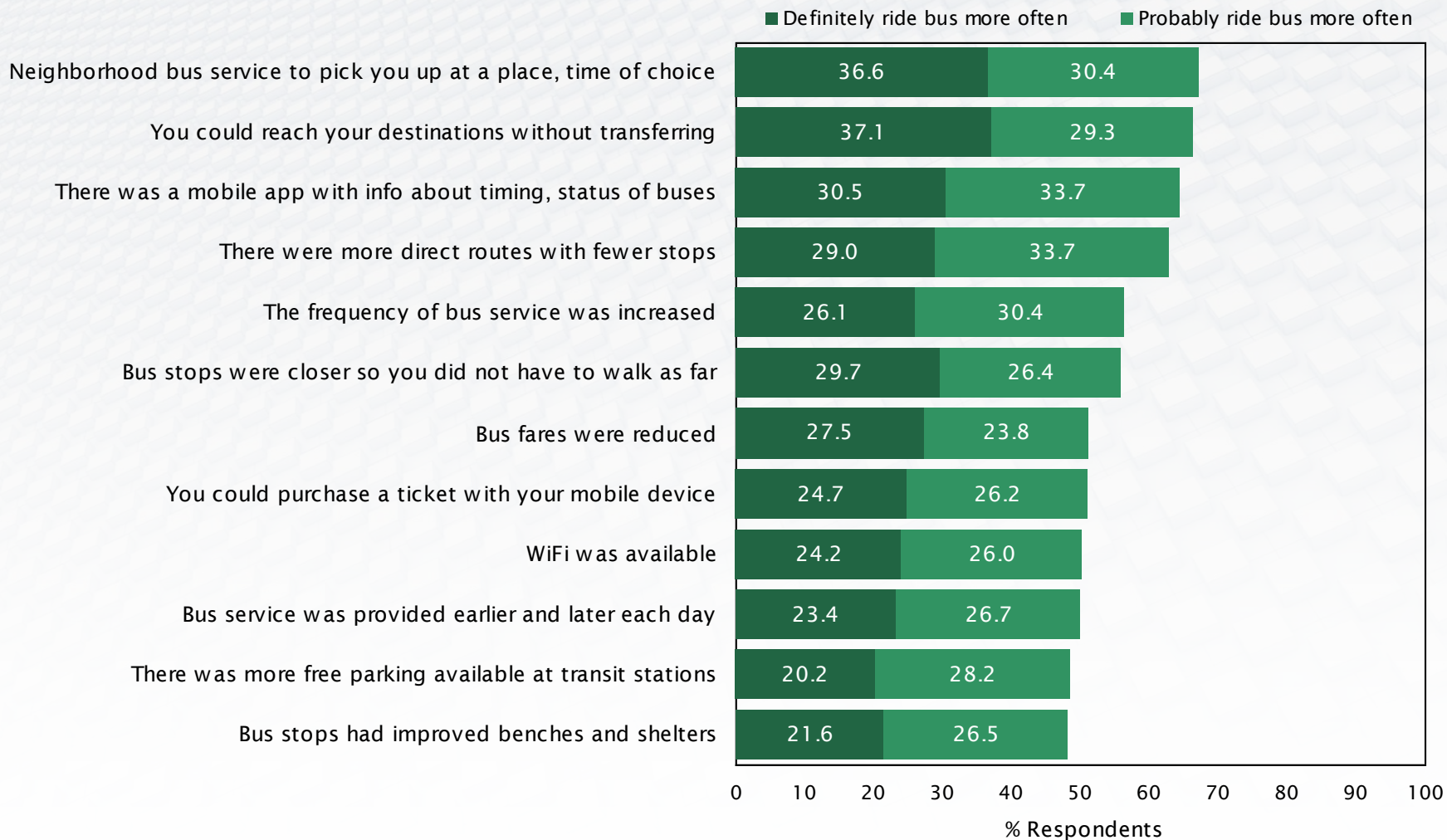


Changes Needed to Ride Bus



Impact of Service Changes

Q21f Q21j Q21k Q21l Q21m Q21n Q21o Q21p Q21q Q21r Q21s Q21t Q21u Q21v Q21w Q21x Q21y Q21z Q22a Q22b Q22c Q22d Q22e Q22f Q22g Q22h Q22i Q22j Q22k Q22l Q22m Q22n Q22o Q22p Q22q Q22r Q22s Q22t Q22u Q22v Q22w Q22x Q22y Q22z Q23a Q23b Q23c Q23d Q23e Q23f Q23g Q23h Q23i Q23j Q23k Q23l Q23m Q23n Q23o Q23p Q23q Q23r Q23s Q23t Q23u Q23v Q23w Q23x Q23y Q23z Q24a Q24b Q24c Q24d Q24e Q24f Q24g Q24h Q24i Q24j Q24k Q24l Q24m Q24n Q24o Q24p Q24q Q24r Q24s Q24t Q24u Q24v Q24w Q24x Q24y Q24z Q25a Q25b Q25c Q25d Q25e Q25f Q25g Q25h Q25i Q25j Q25k Q25l Q25m Q25n Q25o Q25p Q25q Q25r Q25s Q25t Q25u Q25v Q25w Q25x Q25y Q25z



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

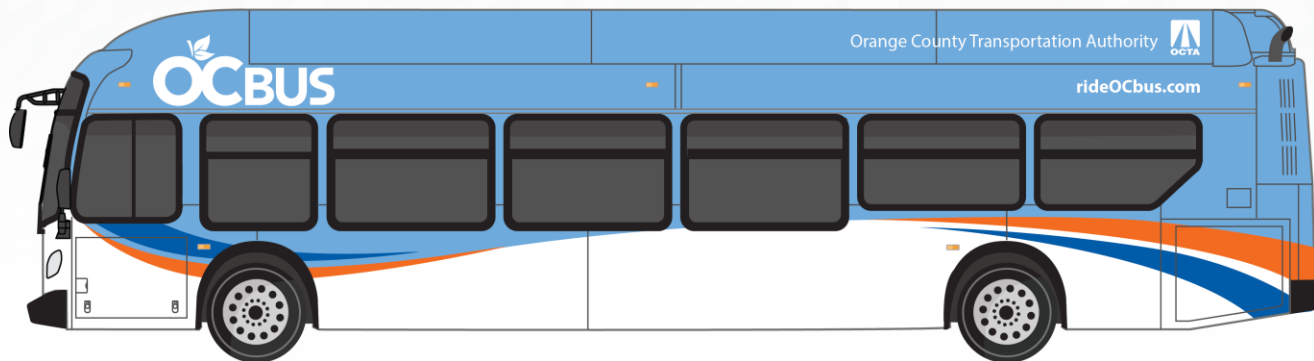
- Implement Bravo! Route 560 in June 2016
 - Santa Ana Depot to Long Beach
- Introduce faster service through stop consolidation
 - Route 57X – October 2015
 - Route 29X, 64X, 53 – February 2016
- Increase frequency on high-demand service
 - Conduct route performance analysis
 - Provide recommendations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