

COVID Travel Survey #2

Conducted June 22 to July 3, 2020

Survey Findings

COVID Travel Survey #2

Background Information

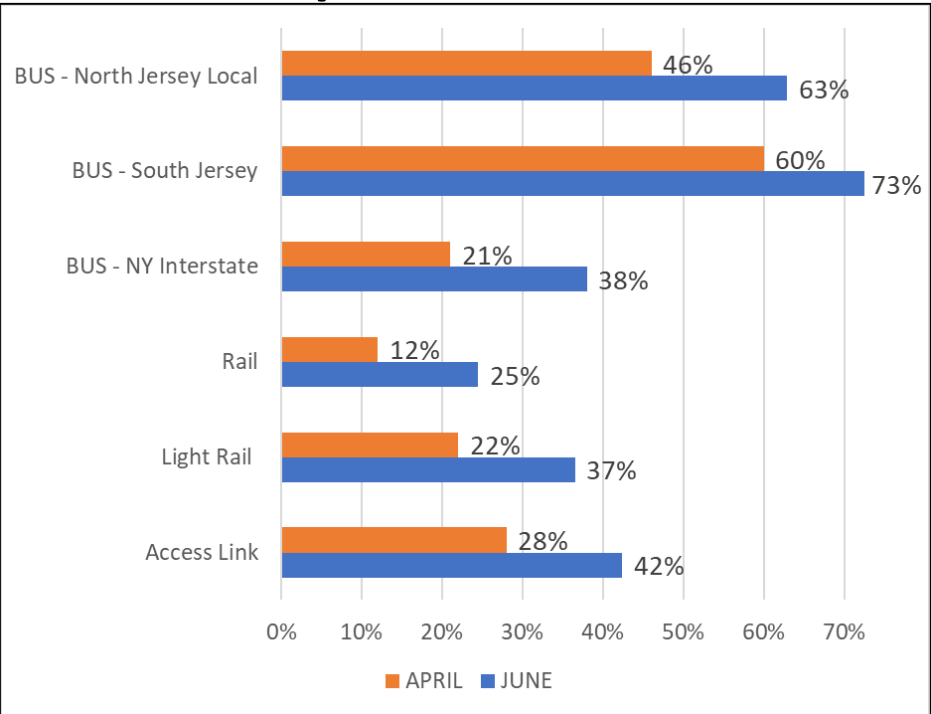
- ❑ COVID Travel Survey #1 – April 8-19, 2020
- ❑ COVID Travel Survey #2 – June 22-July 3, 2020
- ❑ For COVID #2 surveys were send to about 40,000 respondents of COVID #1 with emails and almost 16,000 surveys were received.
- ❑ Survey included questions about
 - Current travelers – mode, purpose, frequency, departure time, destination, cleanliness, social distancing, face covering usage
 - Reason for not traveling
 - Work from Home – related questions
 - NJT Information Sources, Importance of Recovery Measures
- ❑ COVID Travel Survey #2 – Part A – Customers Traveling in June
- ❑ COVID Travel Survey #2 – Part B – Work from Home and additional questions

COVID Travel Survey #2

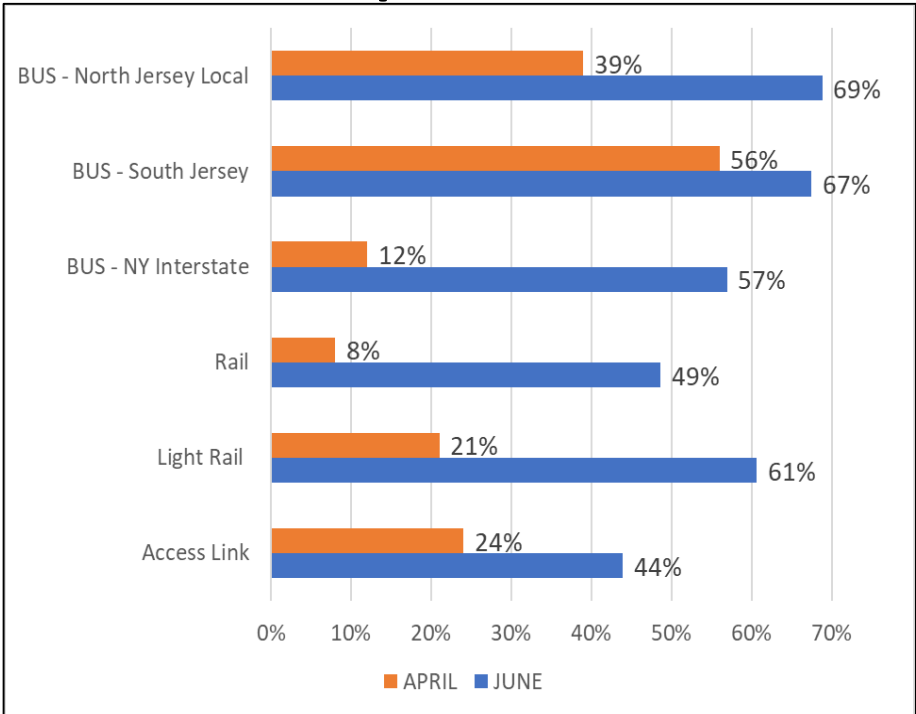
Part A – Customers Traveling in June

Percent of Customers Traveling at least once per week During COVID in April & June 2020

Work Trips



Non-Work Trips

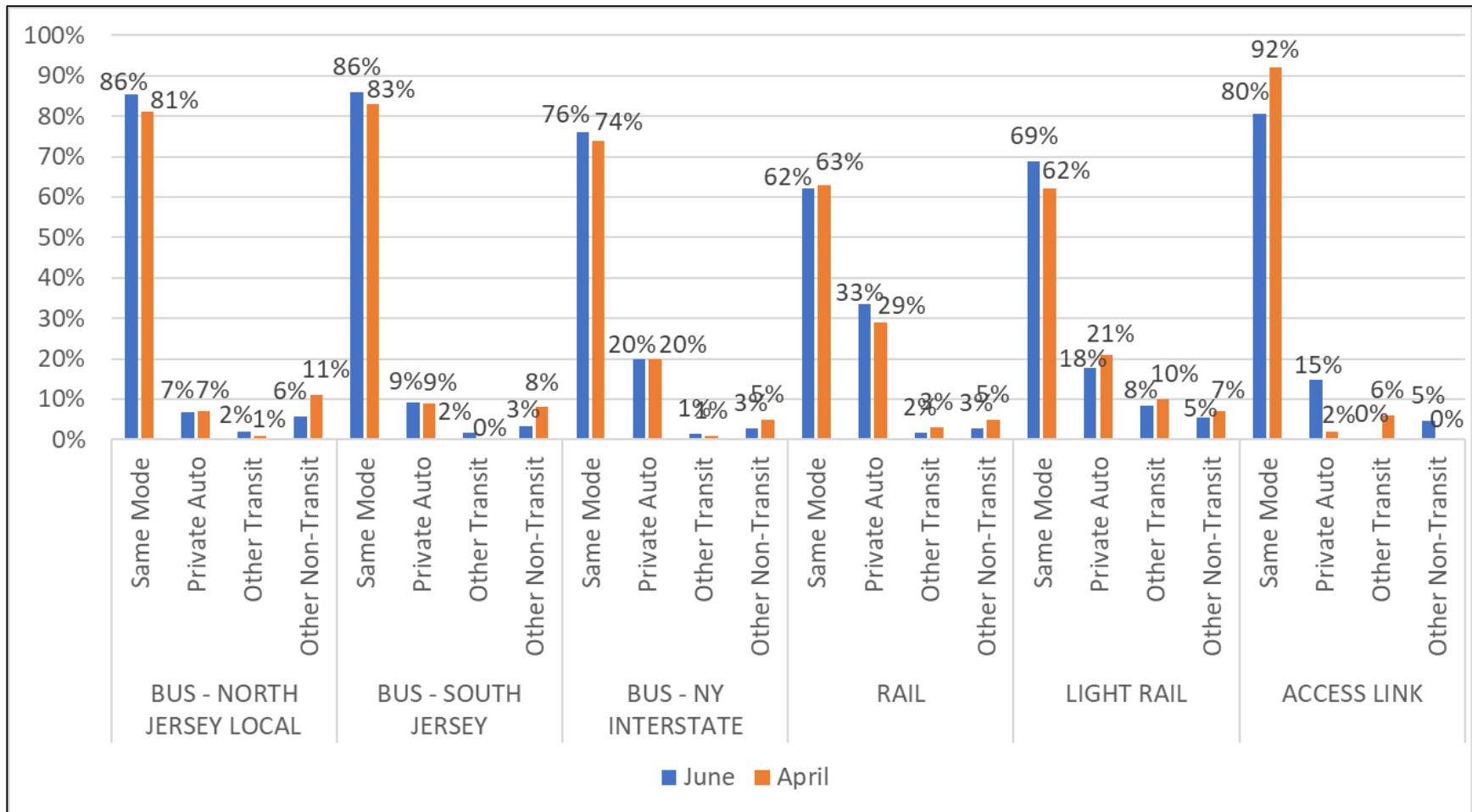


- As the travel restrictions have lessened and businesses are re-opening, the percent of customers traveling has increased in June.
- The largest increases are in Non-Work trips.
- Of the customers that were traveling in June but not in April, about half were not working in April and the other half were working from home.

4 Note: the modes shown on this slide is the mode customers used before COVID.

Percent of Customers Still Traveling by Mode

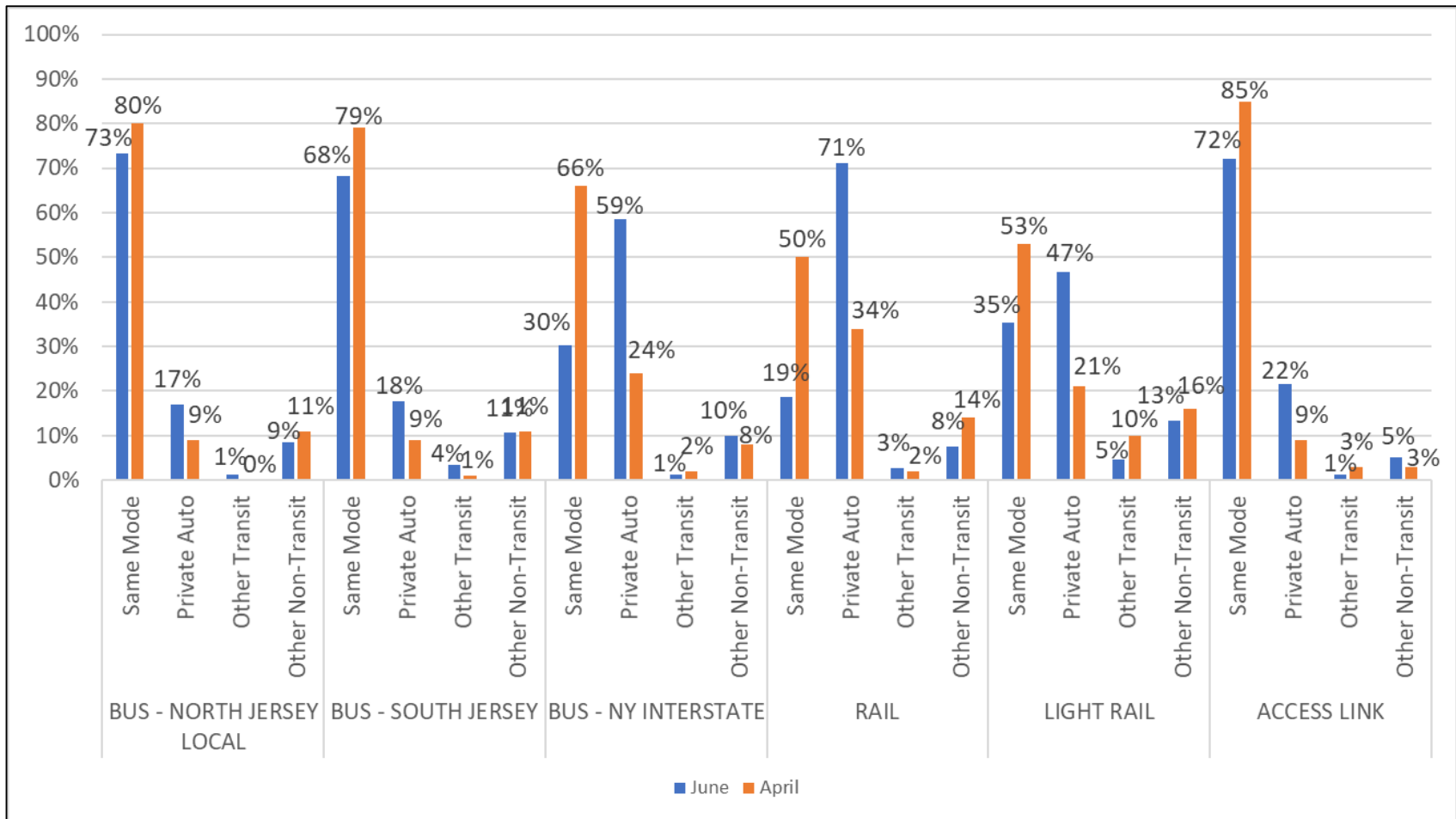
WORK TRIPS



- The percent customers traveling for a Work Trip using the SAME NJ TRANSIT mode as *before COVID* has increased for most modes/markets

Percent of Customers Still Traveling by Mode

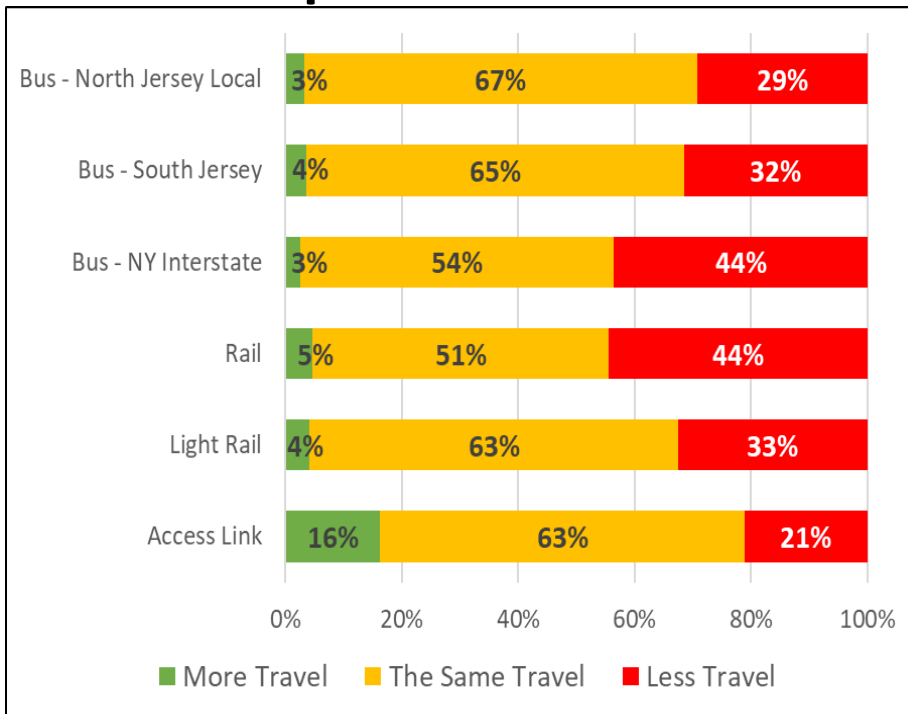
Non-Work TRIPS



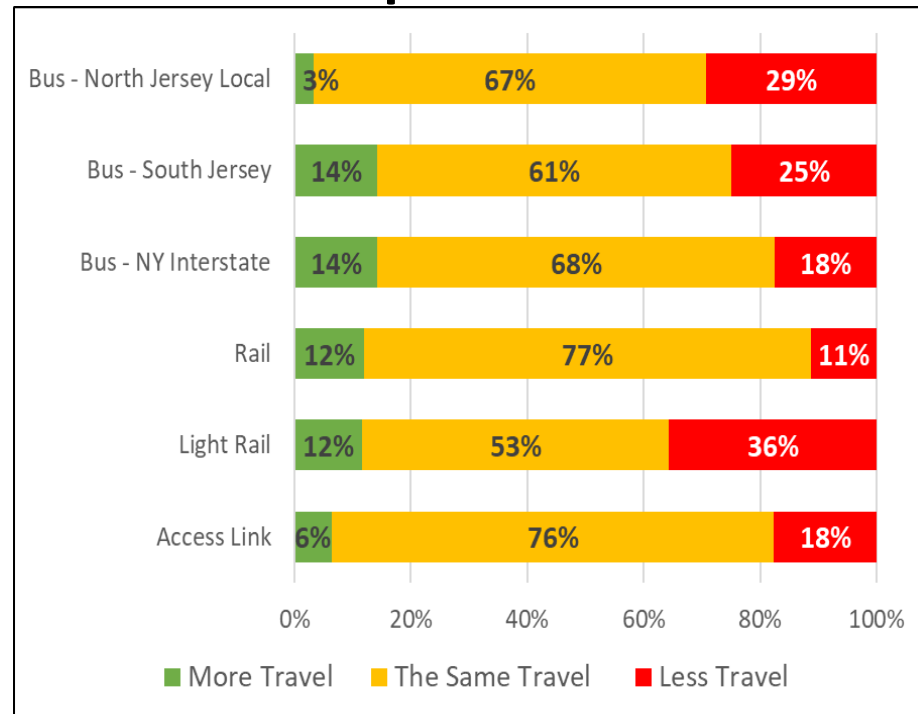
- The percent of customers making Non-Work trips using the SAME NJ TRANSIT mode as *before COVID* has decreased from April to June

June Trip Frequency Compared to Before COVID Trip Frequency

Work Trips



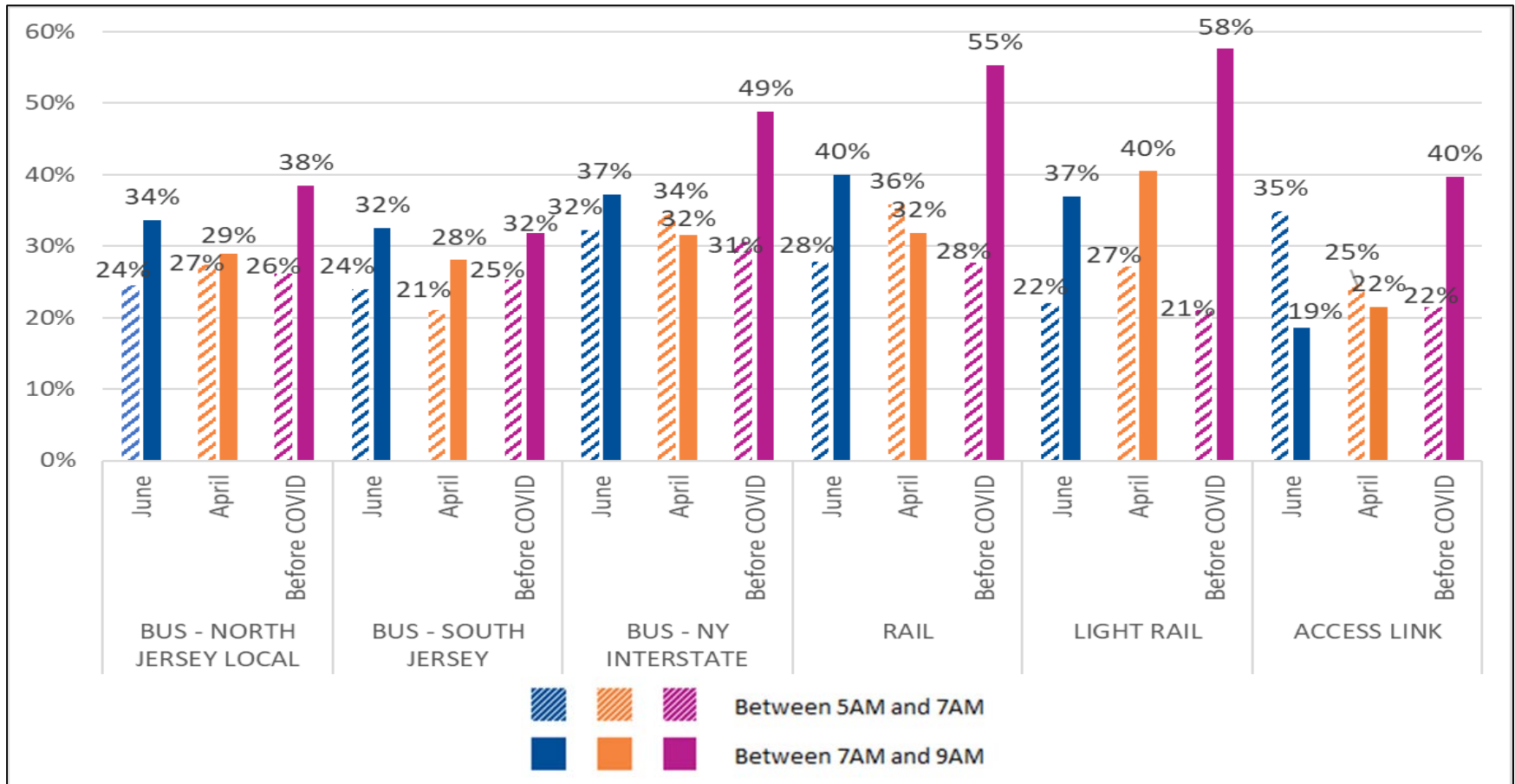
Non-Work Trips



- In June, most of the Work and Non-Work trips were occurring at the same frequency as before COVID
- NY Interstate Bus and Rail have the highest percentage of Work Trips that are occurring less frequently than before COVID

Departure Times of Customers Traveling to Work

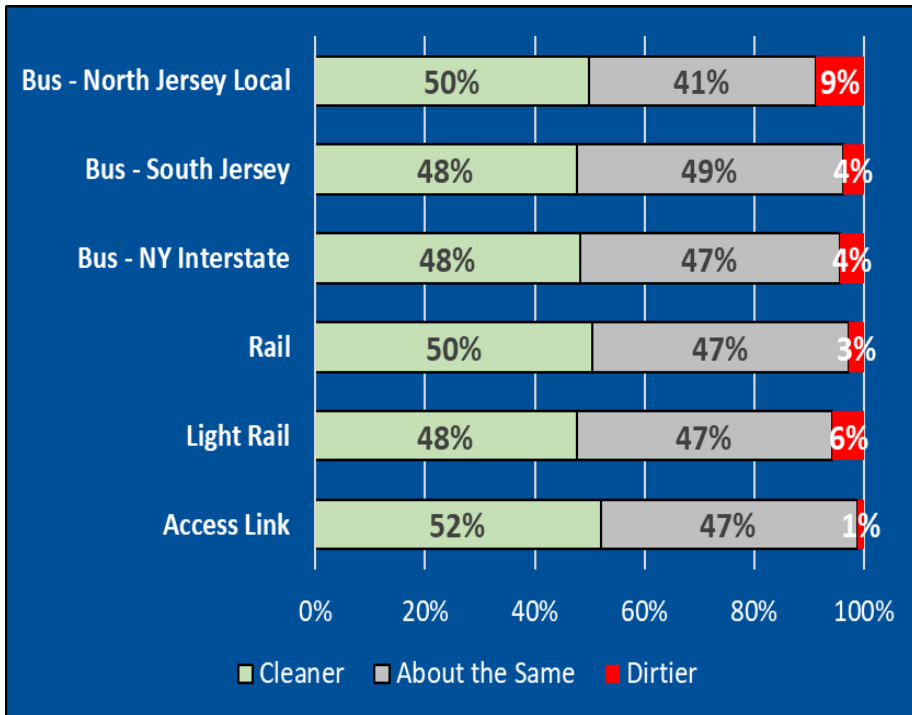
WORK TRIPS



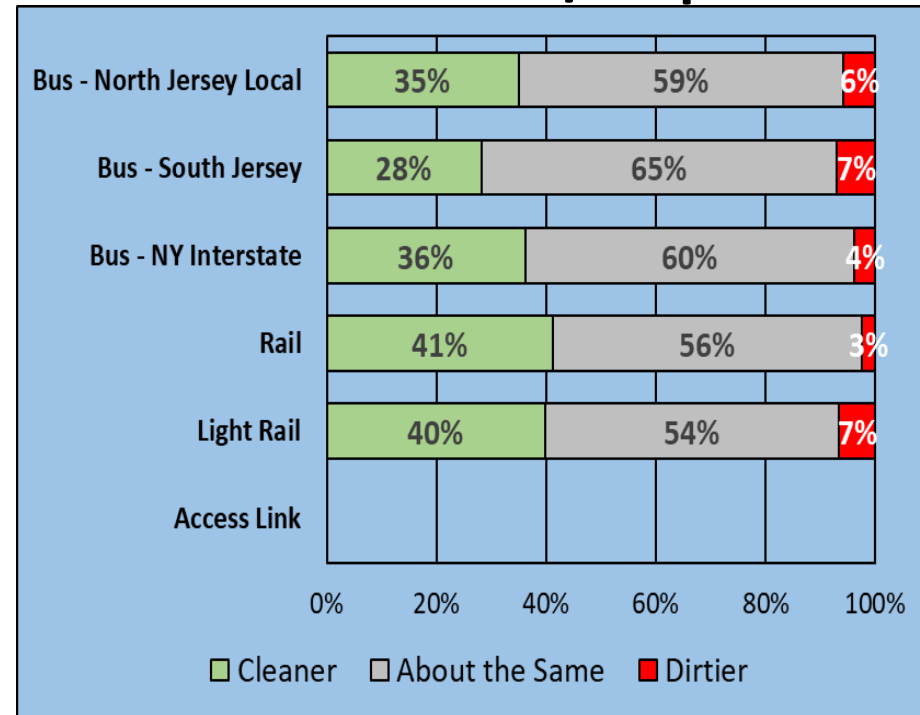
- For most markets and modes, travel during the 7-9am period was more peaked than in April where travel was more balanced between 5-7am and 7-9am.
- About 10 percent are currently traveling between 9 and 10am

Cleanliness Compared to *Before COVID*

Onboard NJ TRANSIT Vehicles



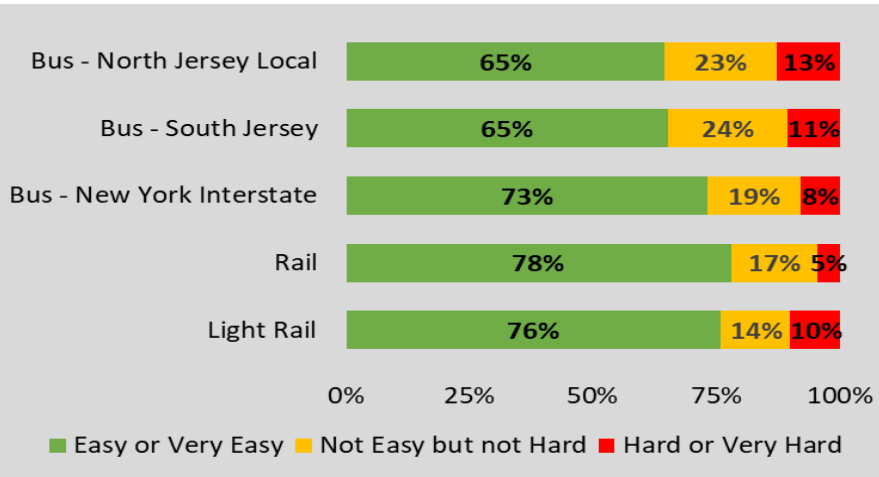
NJ TRANSIT Stations/Stops



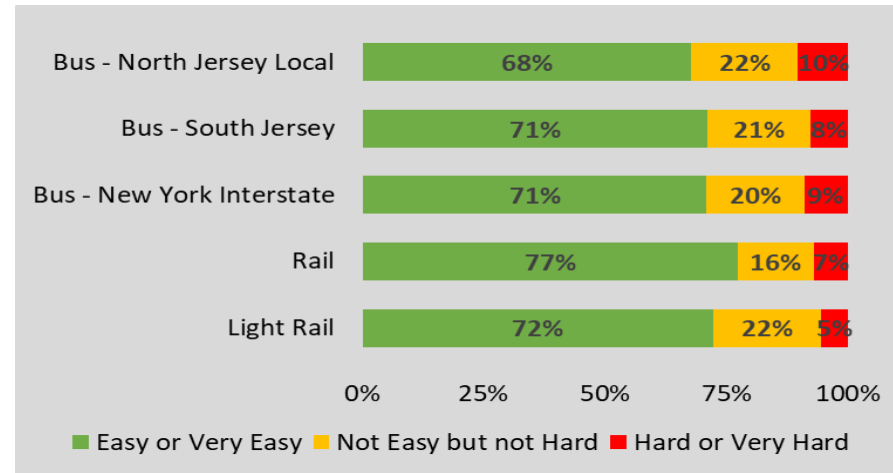
- About 50 percent of customers think NJ TRANSIT vehicles are cleaner than before COVID while 9 percent or less think they are dirtier
- About 30 to 40 percent of customer think NJ TRANSIT Stations/Stops are cleaner than before COVID while 7 percent or less think they are dirtier

How easy has it been to maintain a safe Social Distance when ... ?

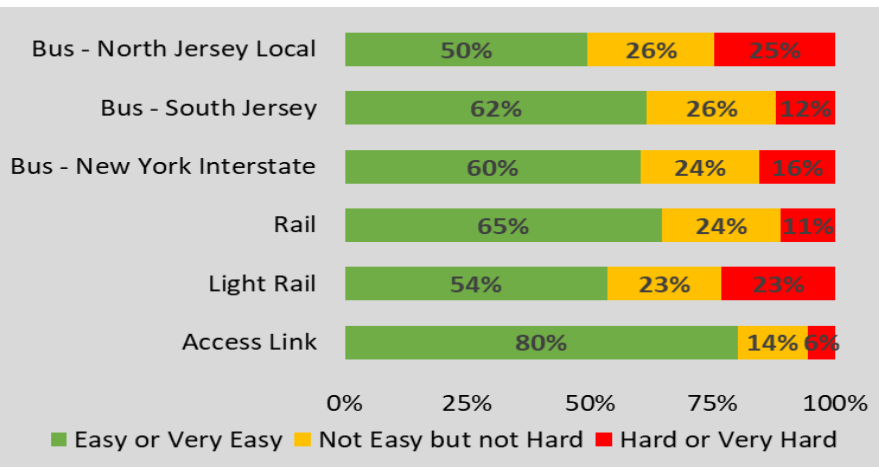
Purchasing a Ticket



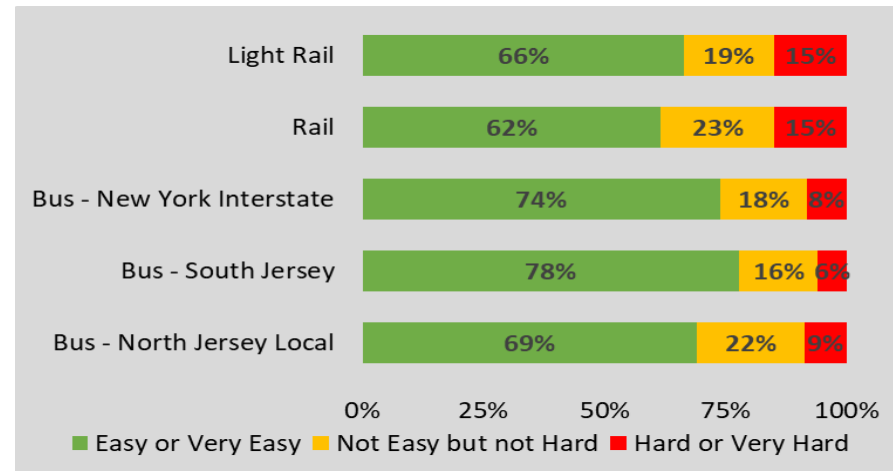
Waiting at the Station/Stop



Riding on NJ TRANSIT

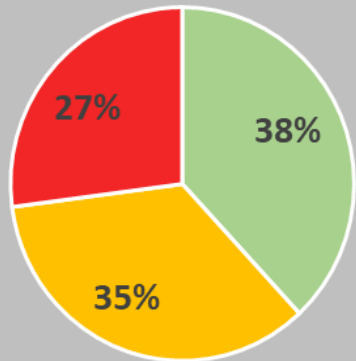


Exiting the Station



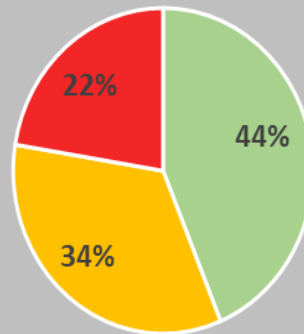
How are your fellow passengers doing to observe and maintain proper social distancing?

Bus - North Jersey Local



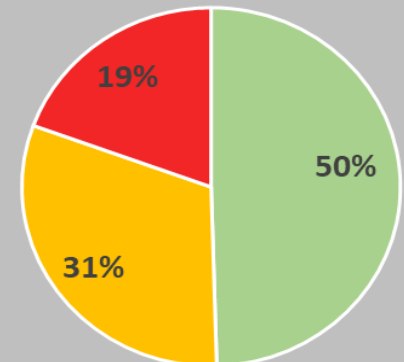
Good or Very Good Acceptable
Poor or Very Poor

Bus - South Jersey



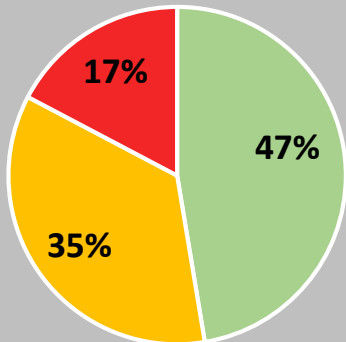
Good or Very Good Acceptable
Poor or Very Poor

Bus - New York Interstate



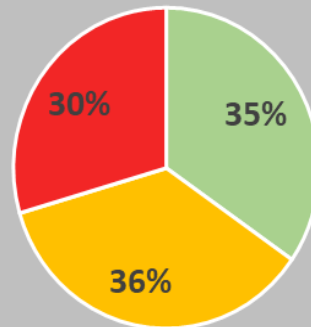
Good or Very Good Acceptable
Poor or Very Poor

Rail



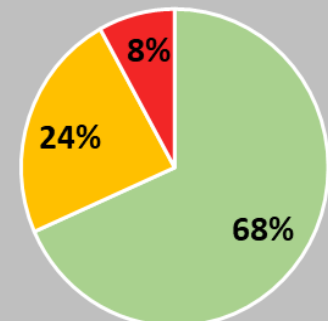
Good or Very Good Acceptable
Poor or Very Poor

Light Rail



Good or Very Good Acceptable
Poor or Very Poor

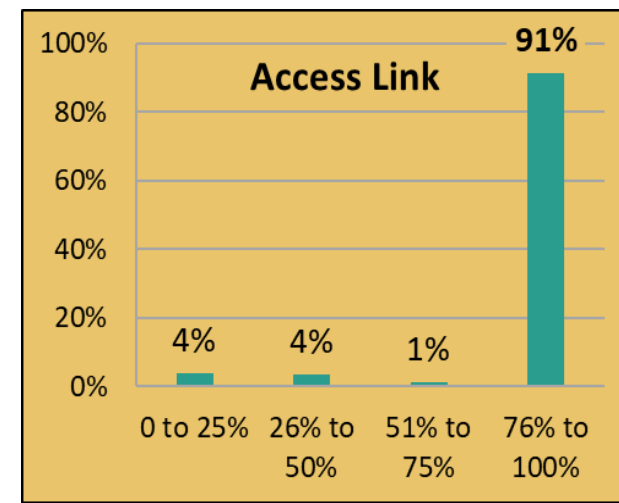
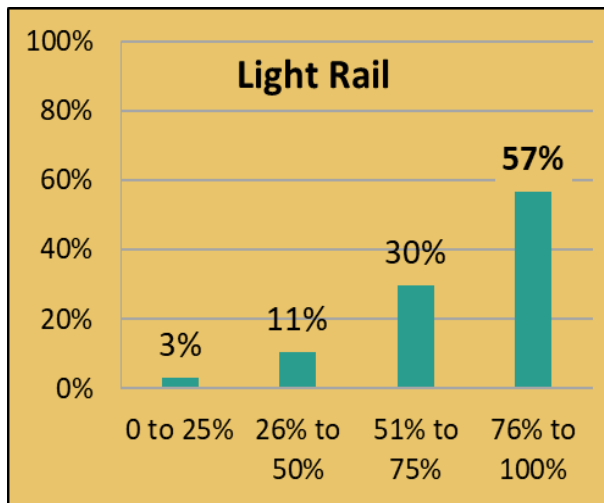
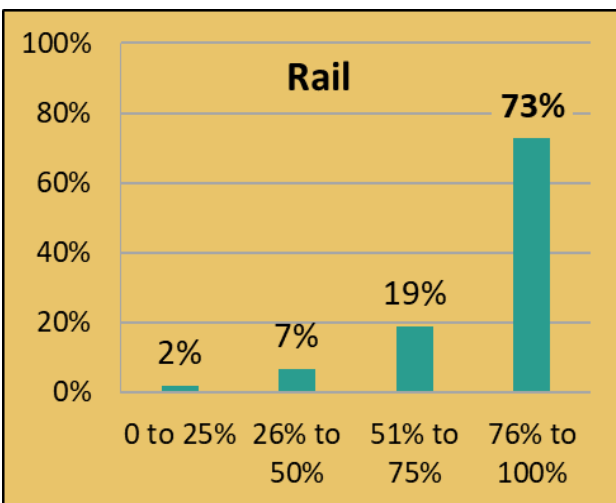
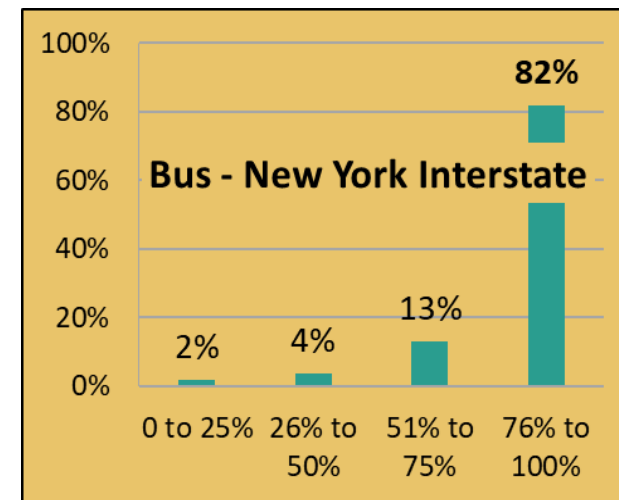
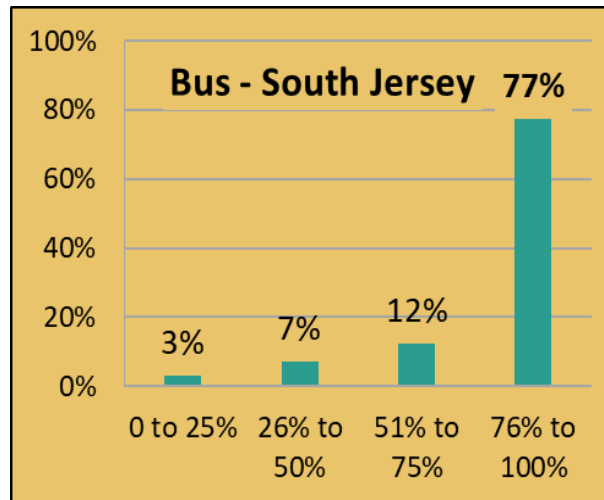
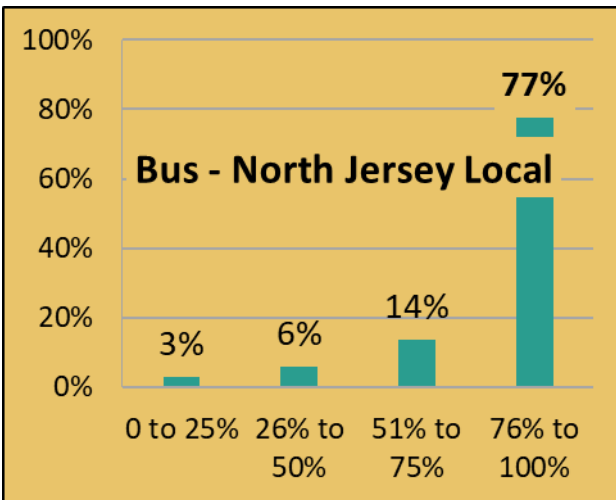
Access Link



Good or Very Good Acceptable
Poor or Very Poor

- 11 In all markets over 70 percent of the customers said their fellow customers were either acceptable or better at maintaining proper social distance

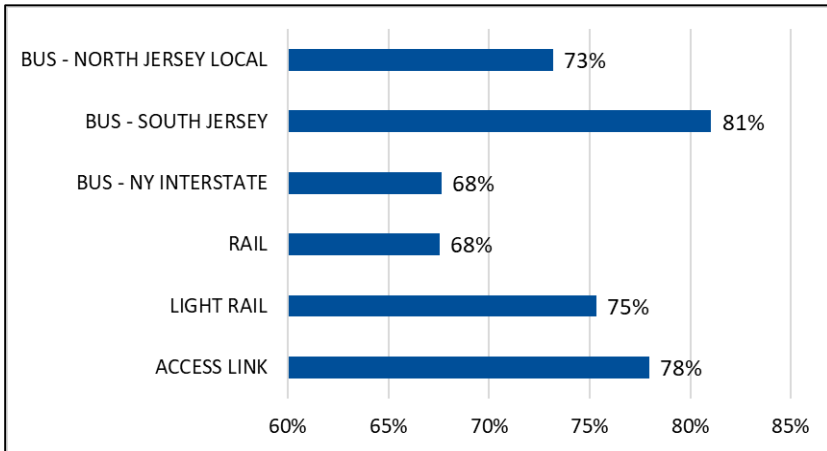
On your last trip on NJ TRANSIT, about what proportion of the riders were wearing face coverings?



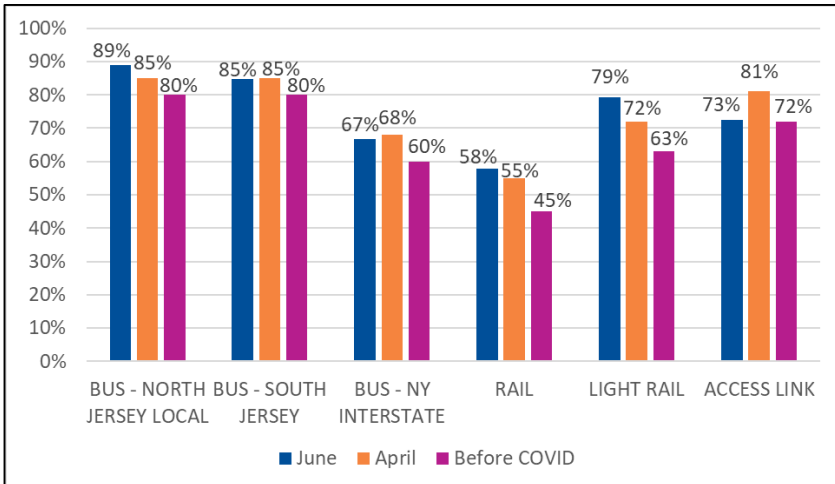
- In most modes/markets, over 70 percent of customers said they observed most of their fellow customers wearing masks.

Demographic Comparisons

Percent of Customers Traveling in June that Self-Identified as an Essential Workers

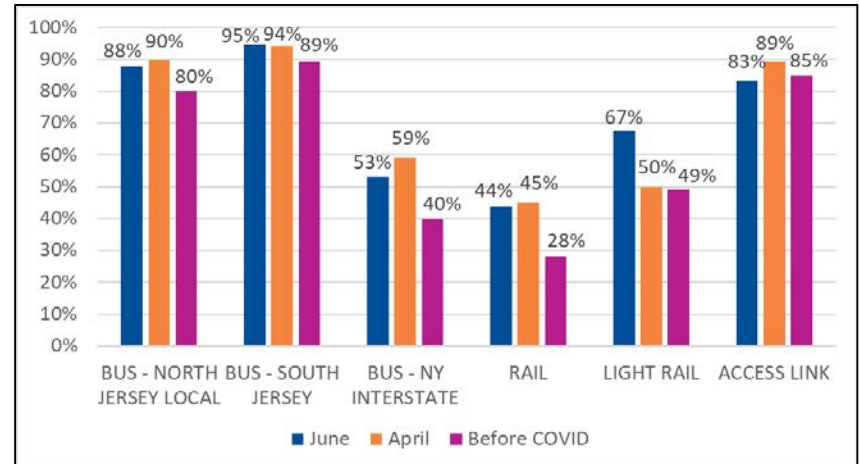


Percent of Customers Making a Work Trip that Own 1 or 0 Autos



- Essential Workers (Health care, Emergency Management, Food Service, Delivery Drivers, Utilities, Transportation, etc.) remain a major portion of the customers traveling
- Over 85 percent of the North and South Jersey Local Bus customers traveling in June own 1 or no autos and about the same percentage earn less than \$75,000 per year.

Percent of Customers Making a Work Trip with a Household Income Less than \$75,000

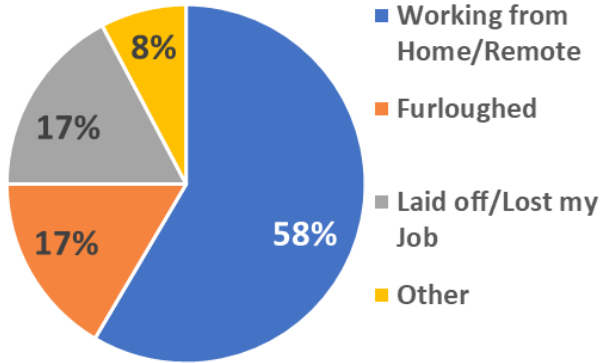


COVID Travel Survey #2

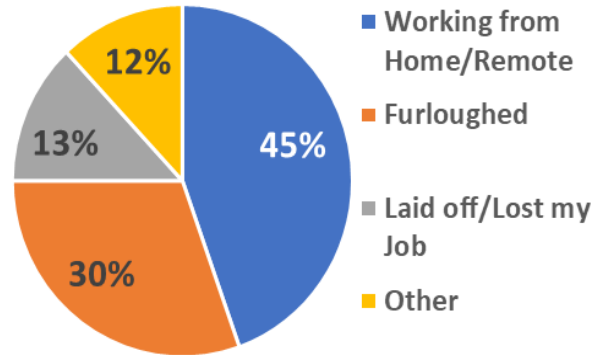
Part B – Work from Home and additional questions

WORK TRIPS – Why not Traveling in June

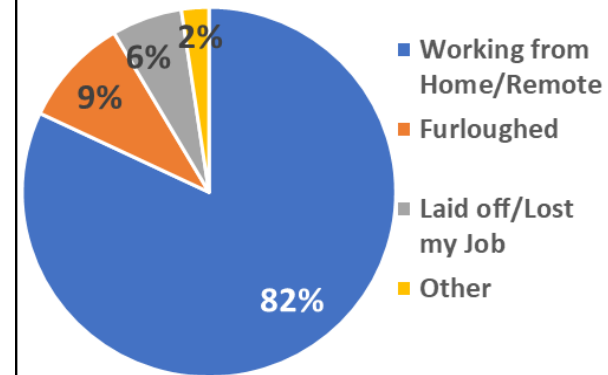
Bus - North Jersey Local



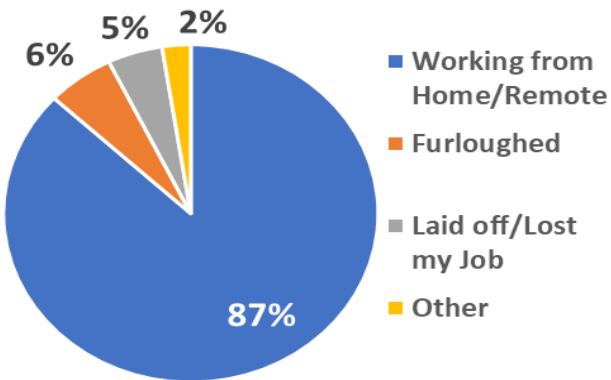
Bus - South Jersey



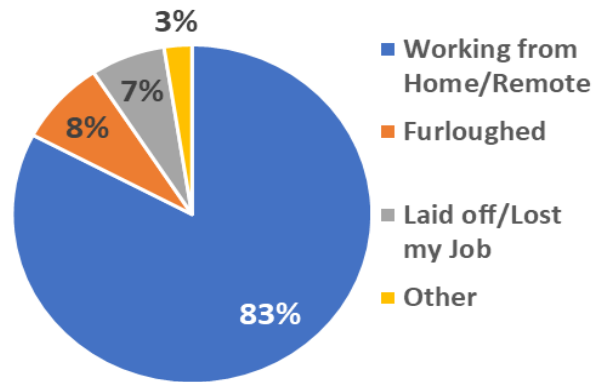
Bus - New York Interstate



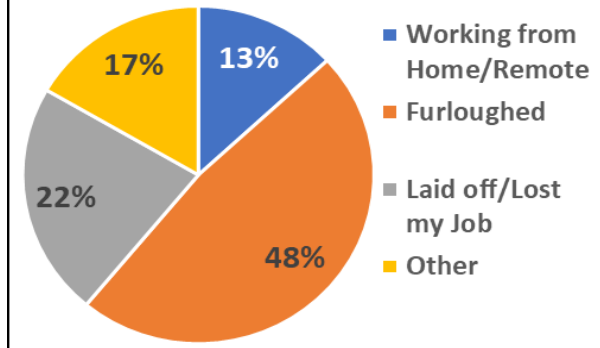
Rail



Light Rail



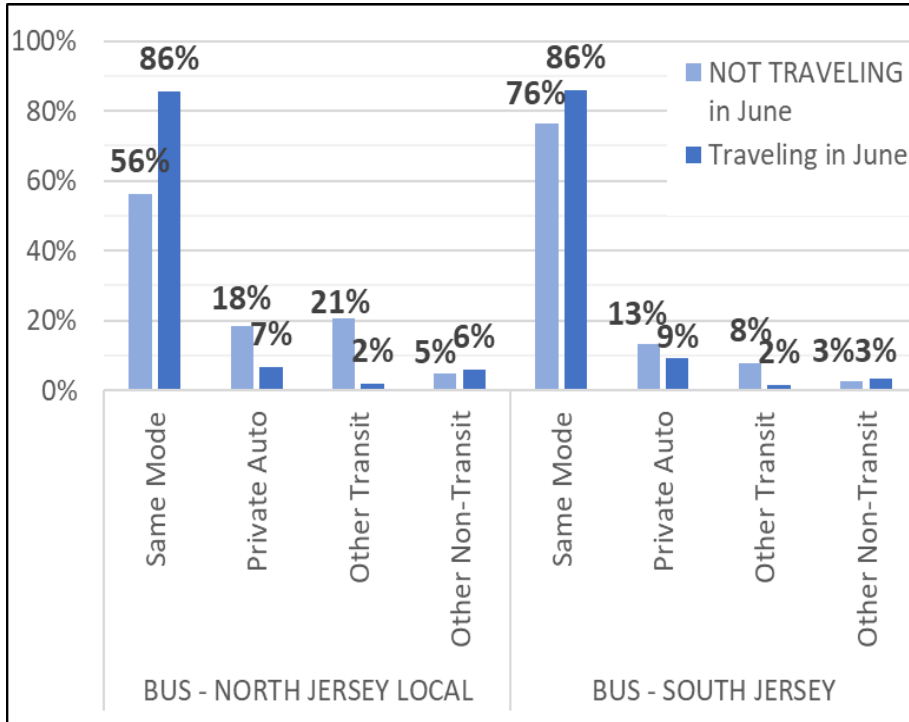
Access Link



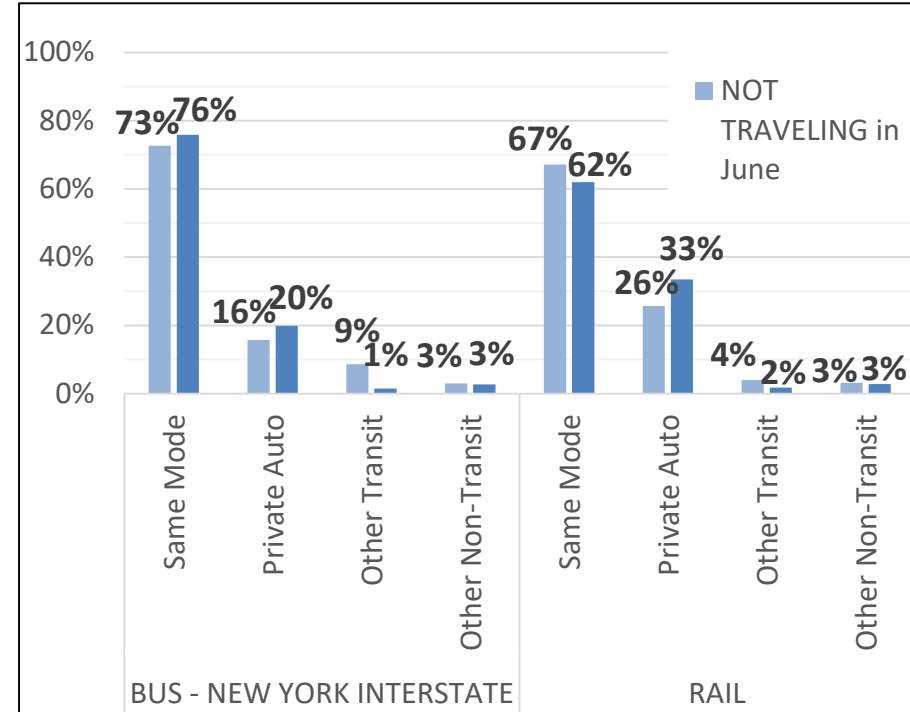
- Rail, NY Interstate Bus and Light Rail have the highest percentage of WFH
- North & South Jersey Bus have higher furlough and laid off percentages

Work Trips - Anticipated or Used Travel Mode

North Jersey and South Jersey Bus



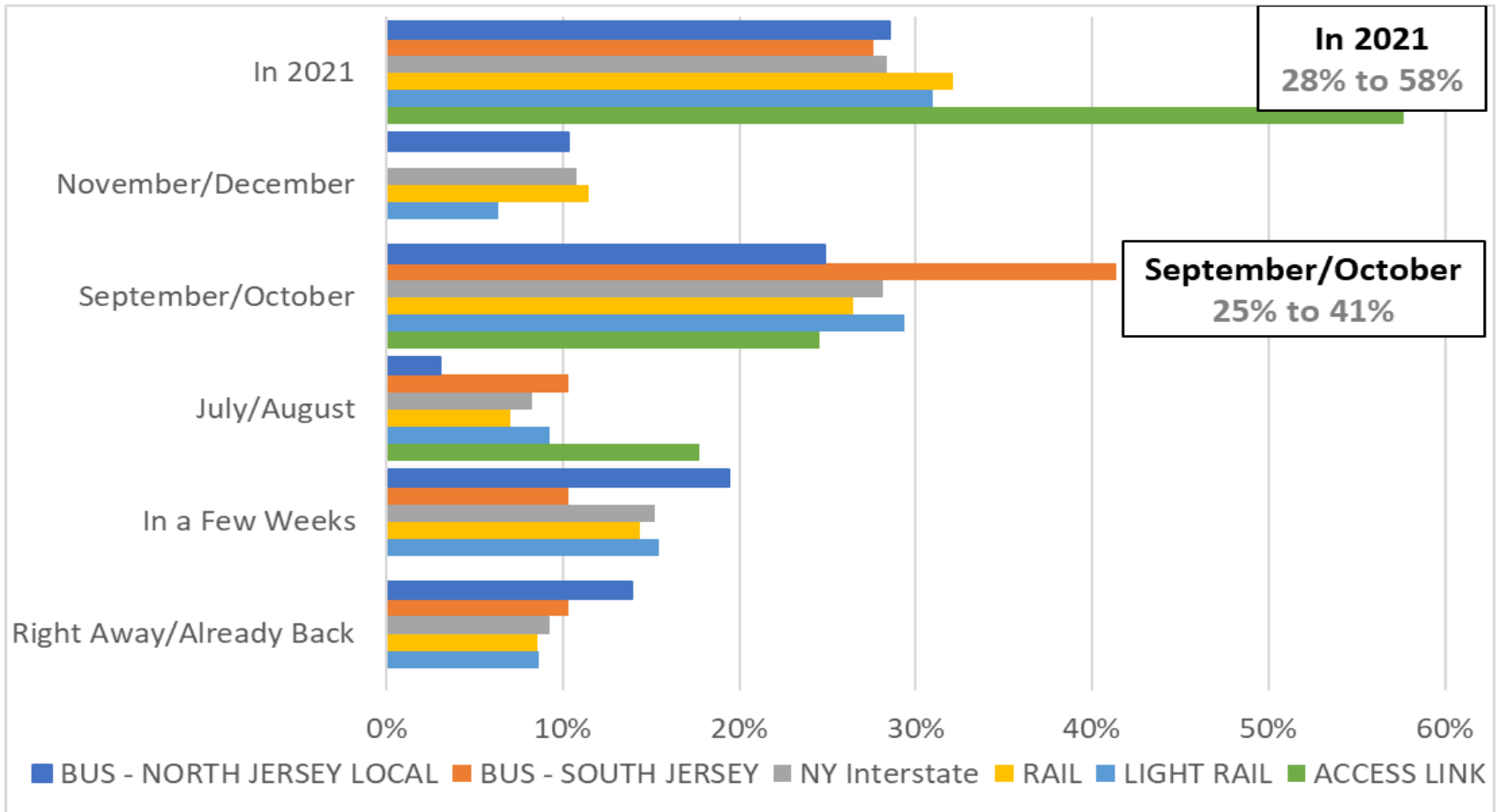
New York Interstate and Rail



- Customers working from home in June were asked, if they had to go to the office in the next week, how would they travel there.
- Compared to the percent of customers currently traveling to their workplace/office by the same mode, less North and South Jersey bus customers would use the same mode while about the same percentage or more NY Bus and Rail customers would use the same mode

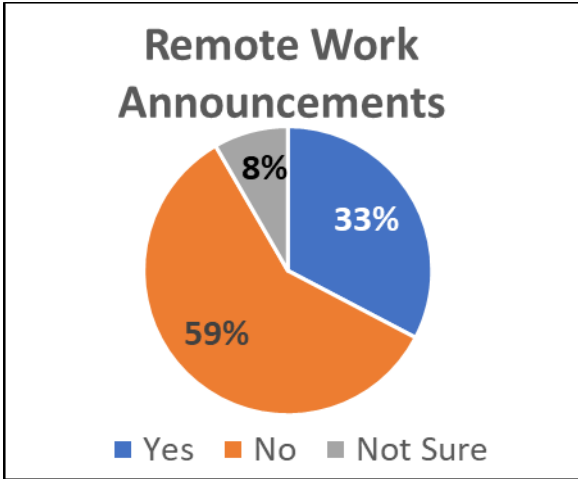
Return to Work Preference

Once government guidance allows and businesses start re-opening, if it was up to you, would you prefer to return to your office/worksite . . . ?



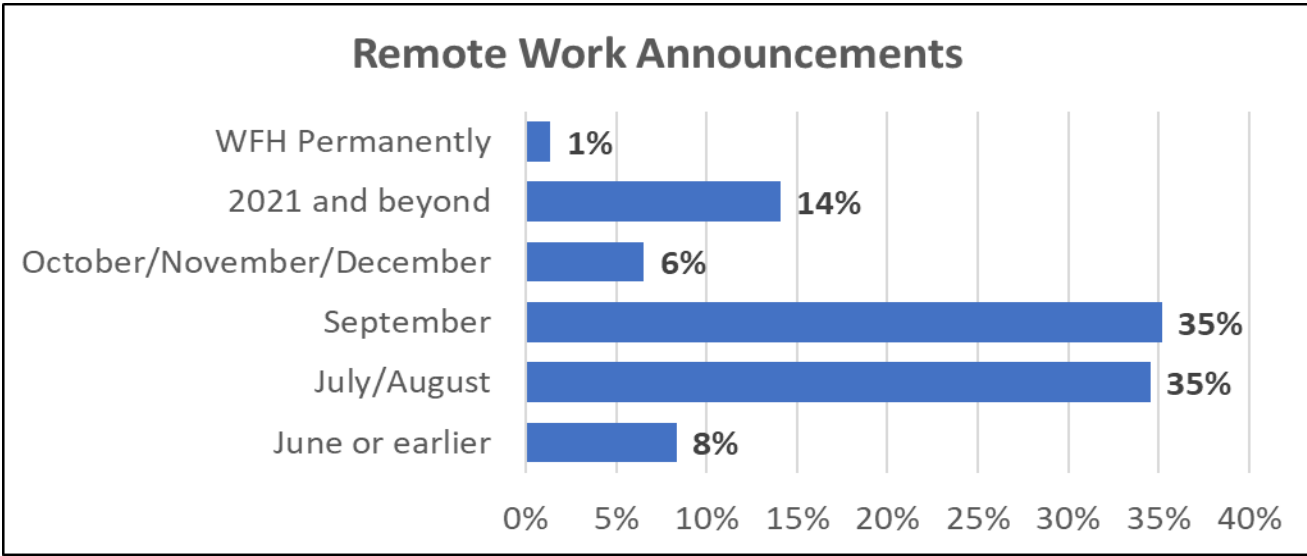
Of customers working from home or remote in JUNE, most prefer to return to work either in September/October or in 2021

Work from Home (WFH)/Remote Work Policies



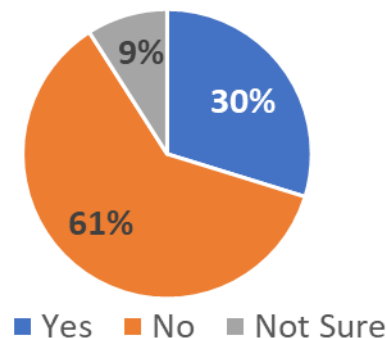
Question: *As of today (JUNE), has your employer made any announcements about the Work from Home/Remote Work Policy (e.g. that employees will need to return by a certain date, that you can WFH until a certain date)?*

- About 30 of WFH respondents said their company had made a Remote Work announcement in June or earlier
- 35% are expecting to return in July/August and another 35% in September
- 14% 2021 and beyond



Staggered/Flexible Hours Policies

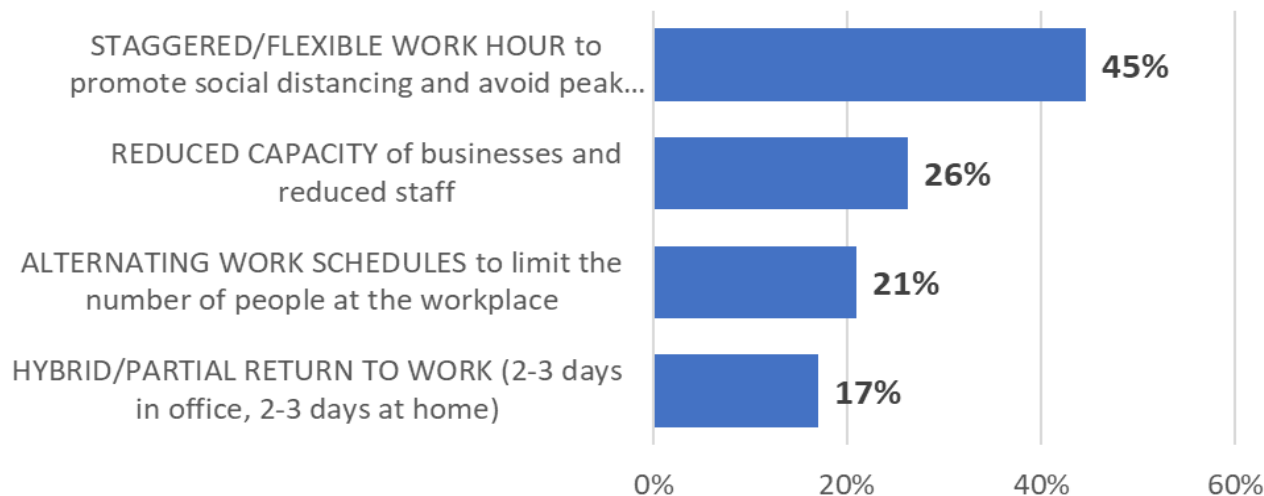
Staggered Hours Announcements



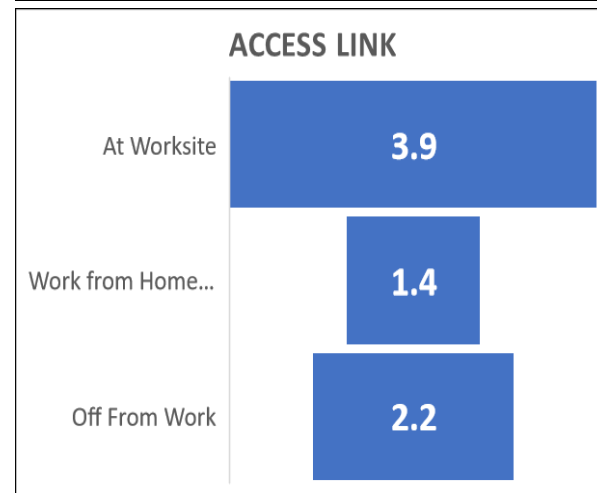
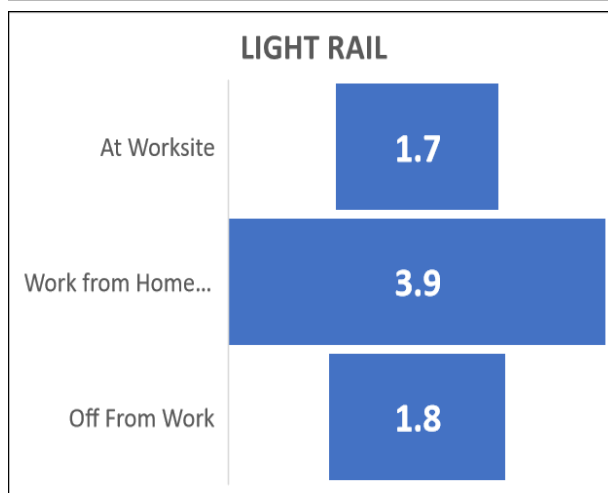
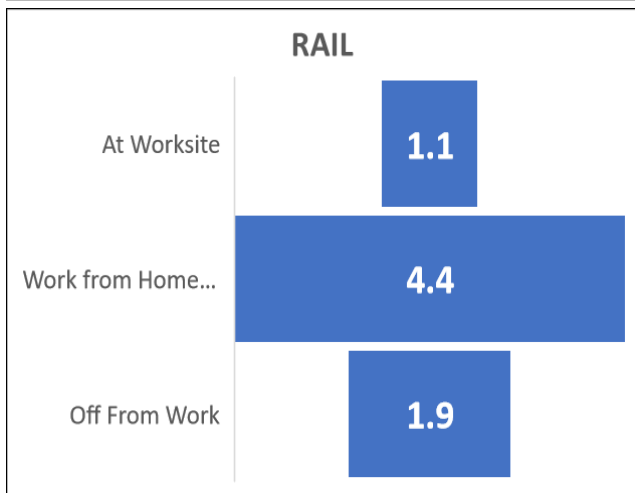
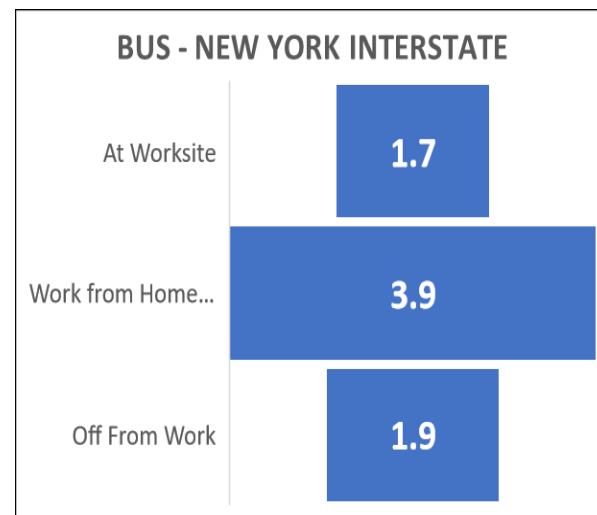
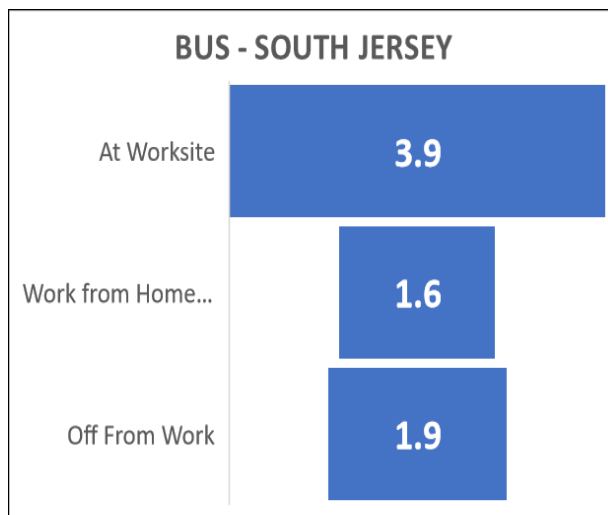
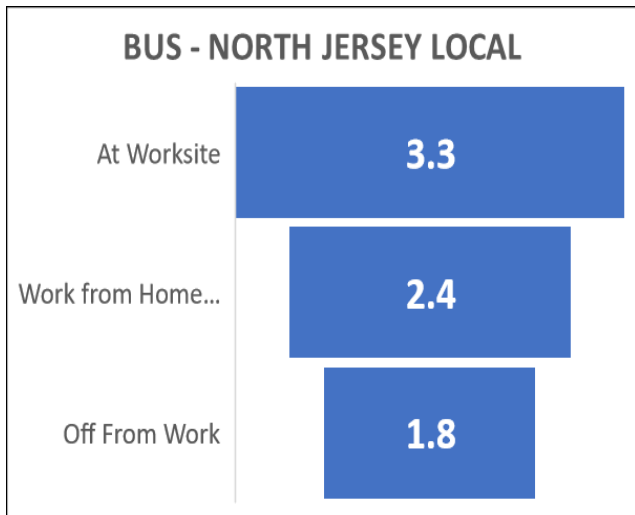
Question: As of today (JUNE), has your employer made any announcements about the Staggered Work Schedules/Flexible Hours Policy after the stay at home order is lifted?

- About 30 of WFH respondents said their company had made announcements about staggered/flexible hours
- 45 percent mentioned that their company had staggered hours to promote social distancing

Staggered/Flexible Work Hours Announcement

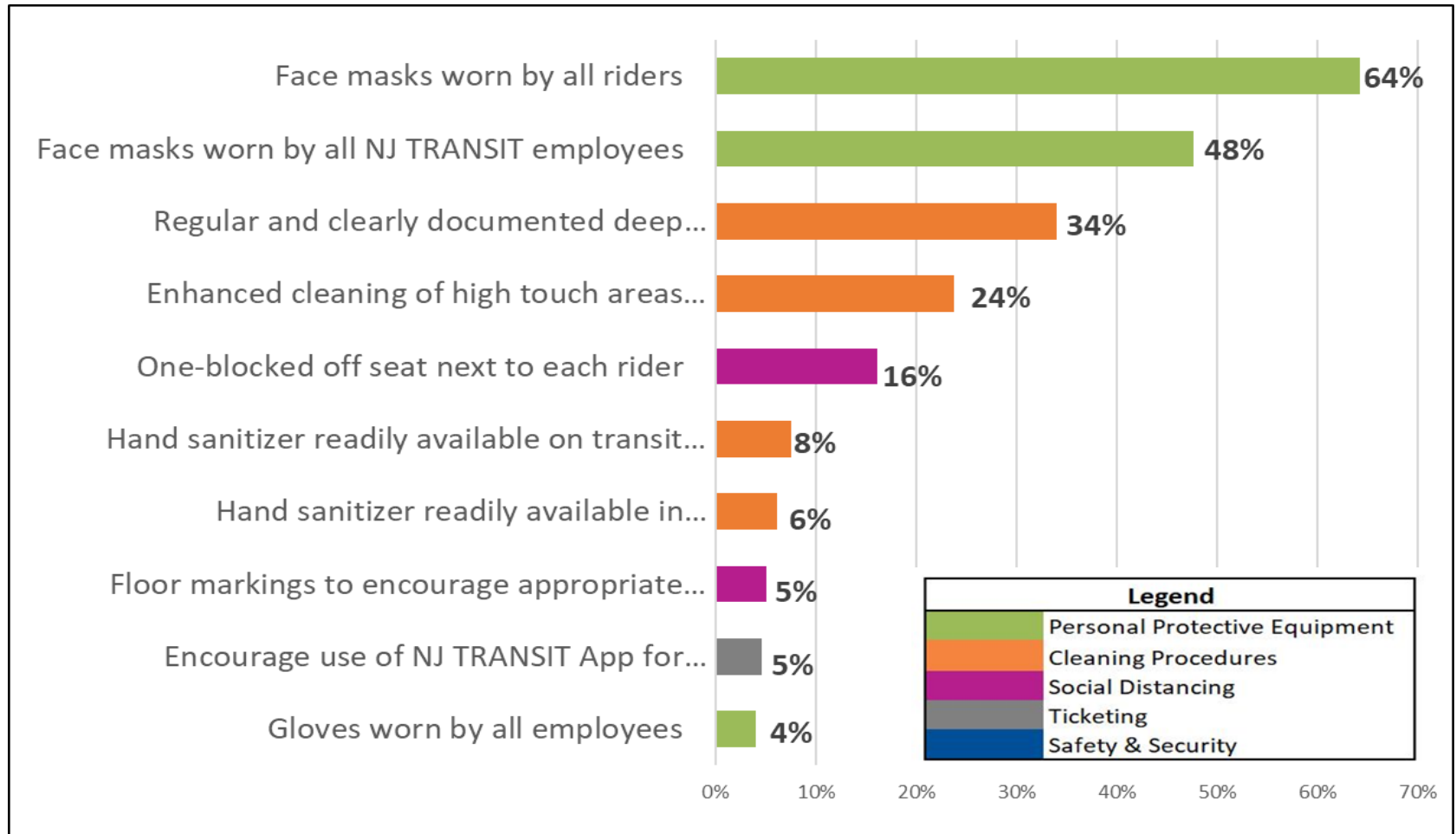


Work Trips: *In the last 7 days, how many days did you . . . ?*



North and South Jersey bus customers and Access Link customers are at the worksite 3 to 4 days a week while other modes are at the worksite 1 to 2 days

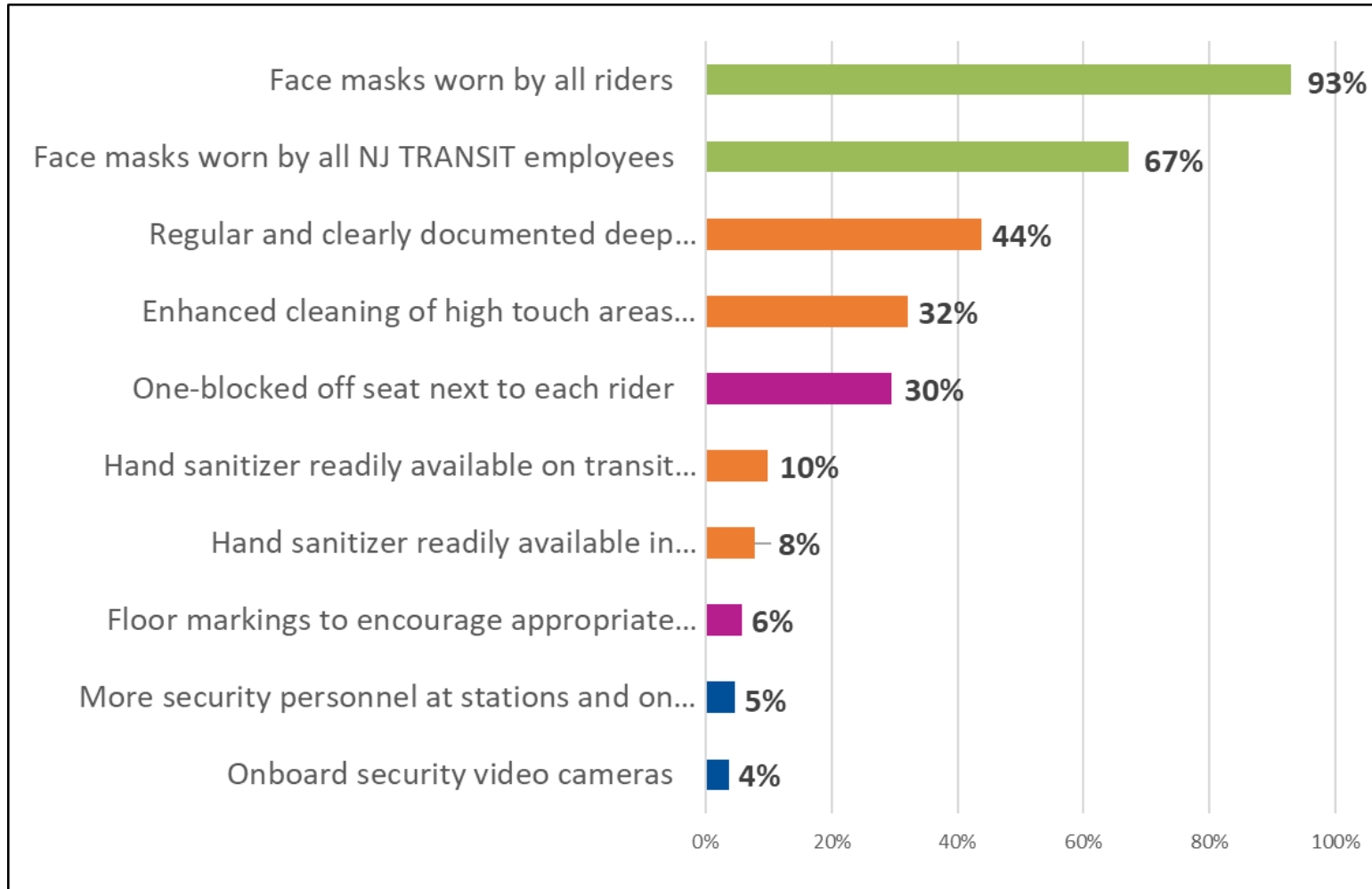
Top 10 Measures Most Important to Customers TRAVELING in JUNE



Cleaning protocols are 4 of the top 10 and PPE are 3 of the top 10 measures for customers currently traveling

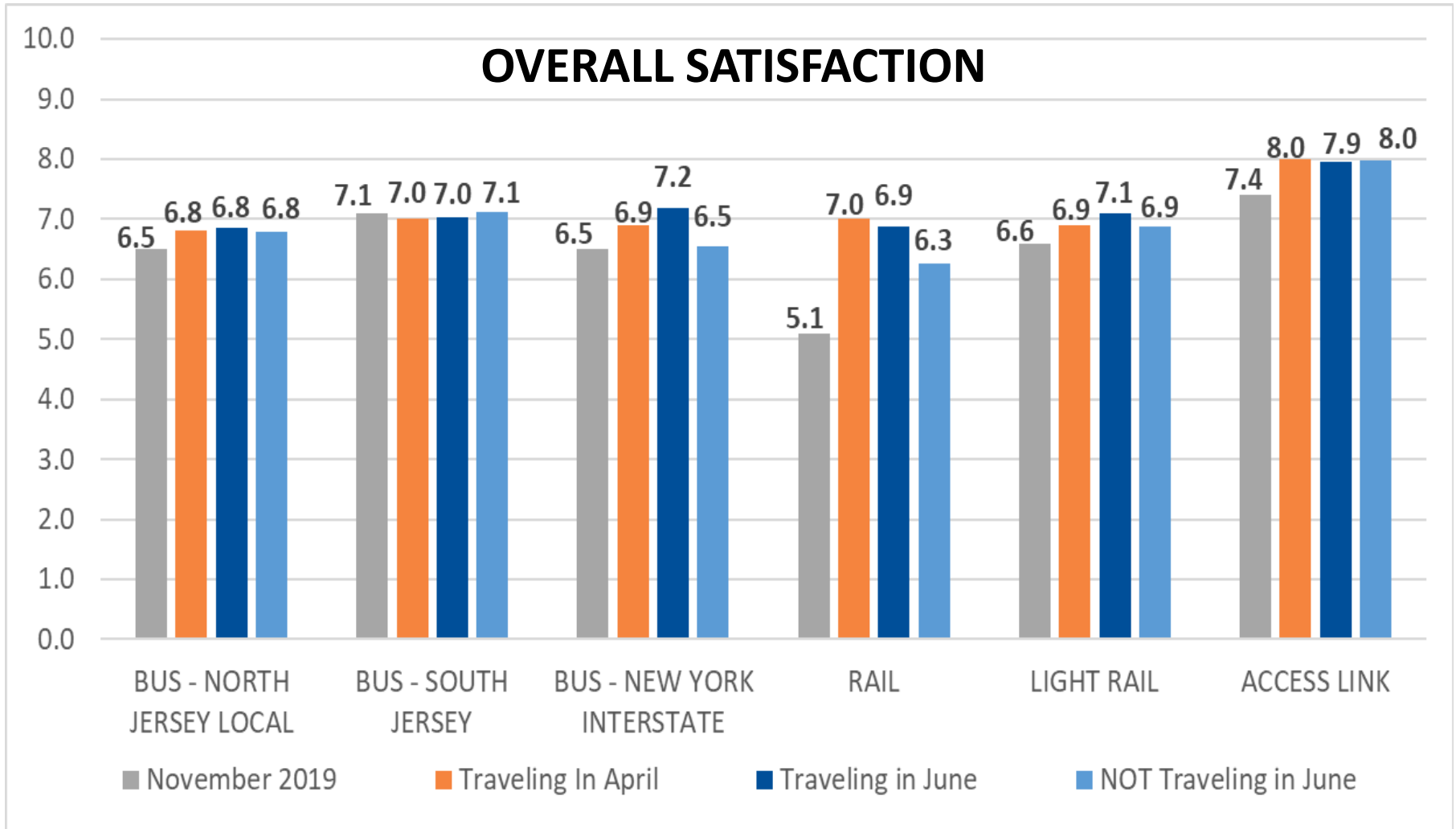
Top 10 Measures

Most Important to Customers NOT TRAVELING in JUNE



The top 8 measures are the same for BOTH customers that traveled in June and those that are not traveling

Customer Satisfaction Ratings



Overall Satisfaction with NJ TRANSIT with both travelers and non-travelers is higher or as high as it was Before COVID (November 2019)

COVID Travel Survey #2 – Next Steps

- ❑ Share results with senior management, operating groups, pandemic planning groups, Board Customer Service Committee
- ❑ Next COVID Travel Survey, likely in October after schools settle into a routine
 - Begin developing questions
 - Include a limited number of Customer Satisfaction questions in lieu of a full survey in the fall