

**Massachusetts Bay
Transportation Authority**

Customer and Employee Survey Results

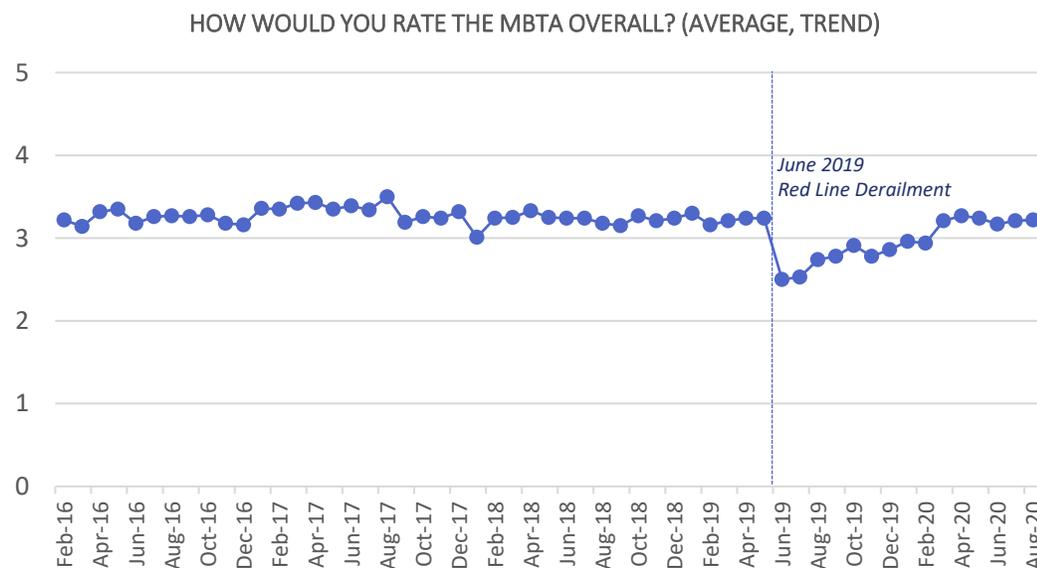
Fiscal and Management Control Board

September 14, 2020

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Introduction to MassDOT/MBTA Panel Surveys

- Ridership is the best way of tracking current travel and determining current trends, but surveys help us understand who is on our system and when departures from the trend may occur
 - Information about when jumps in ridership may occur where new “ceilings” may exist in the new normal
 - Survey program goal: Ask employers about the decisions they control (e.g. when employees will be asked to return to work in person) and ask individual travelers about the decisions that they control (e.g. how they travel)
- MBTA Employer Panel
 - New bi-monthly survey starting July 2020
 - Reasonable representation of organizations in Boston and Cambridge with a teleworking workforce
- MBTA Customer Panel
 - Monthly survey distributed by e-mail since 2015
 - About 1,000 responses per month, weighted to be representative of pre-pandemic ridership by mode
 - Respondents are mostly frequent riders, and the panel over-represents higher-income riders

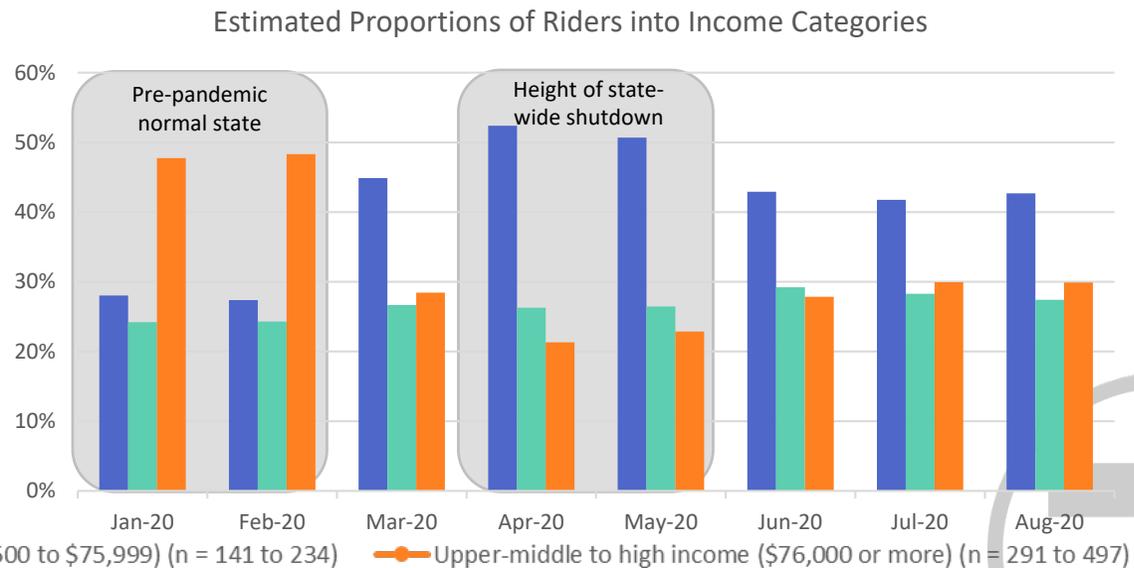
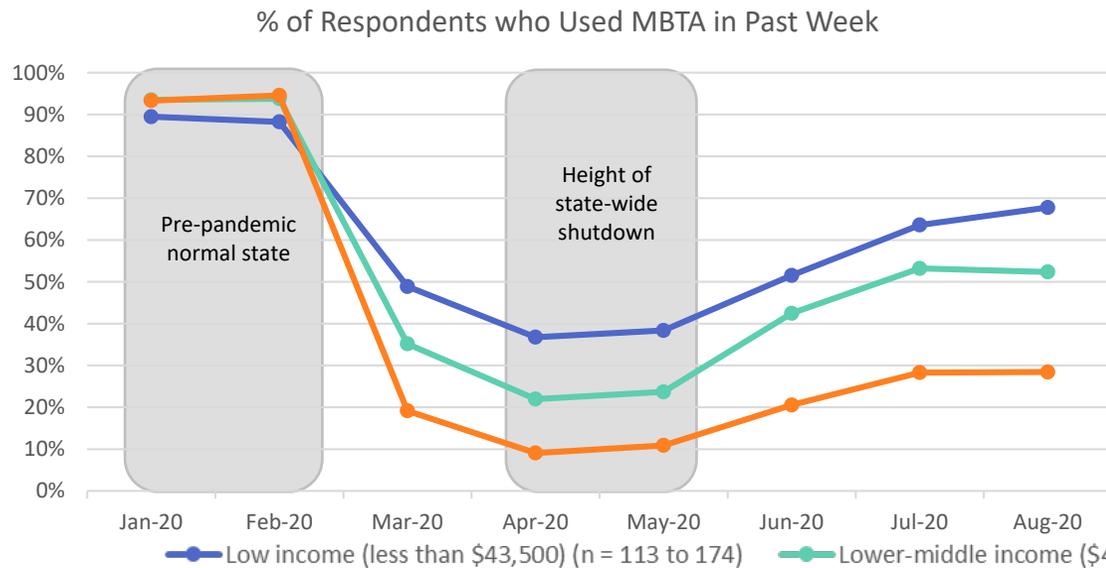


Source: MBTA Customer Opinion Monthly Panel Jan - August 2020; MBTA Employer Panel



Current ridership: Customers most reliant on the MBTA

- Riders of color (especially Black riders), riders from lower income households, and riders without access to a car have been consistently more likely to continue using MBTA services throughout the pandemic
- As ridership increases, these groups of riders remain more likely to be using transit, but the differences are smaller than during the height of the state-wide shutdown
- This tracks with the patterns of other more transit-dependent riders (e.g. bus riders, riders on reduced fares)
- Providing service for customers most reliant on the MBTA would involve prioritizing recent ridership gains above pre-pandemic travel, but below travel from April and May

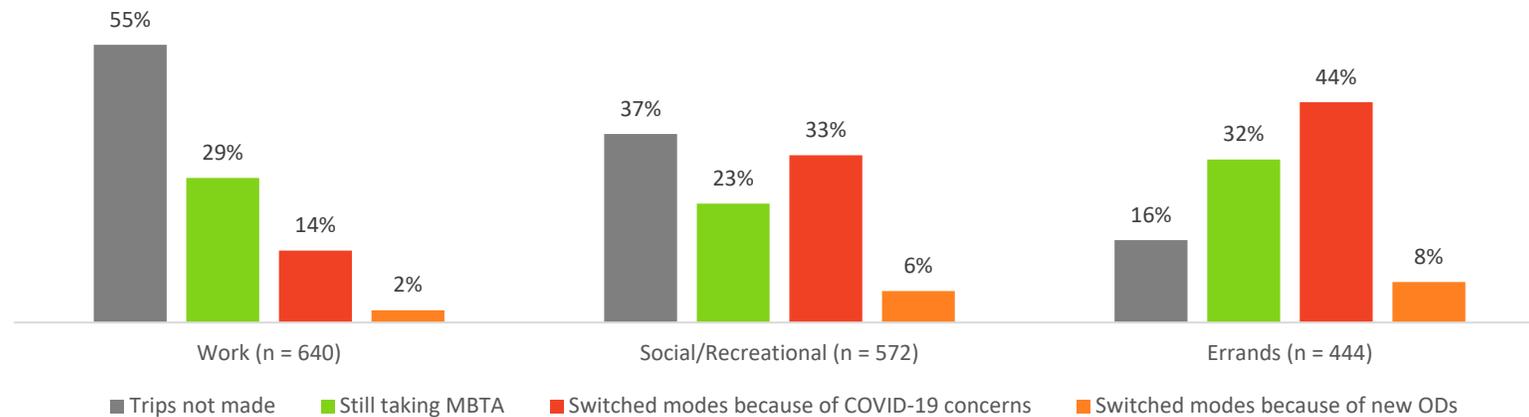


Source: MBTA Customer Opinion Monthly Panel Jan - August 2020

Future ridership: What changes could affect ridership trends

- Understanding where ridership went helps us understand what changes would cause some of these trips to return.
- What happened to trips previously made on the MBTA that are currently not be taken on the MBTA depends on trip type.
- Work trips are more likely to not be made at all, social trips are somewhat evenly split, and errand trips are more likely to be made by a different mode of travel.

Current Activity for Riders Who Previously Made Trips on the MBTA by Trip Purpose



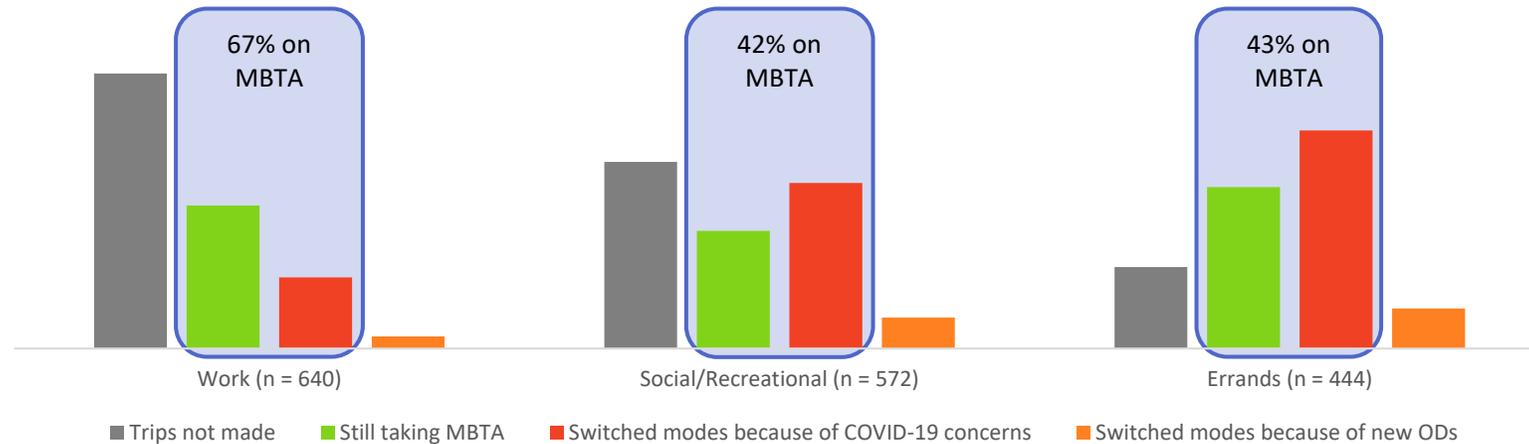
Source: MBTA Customer Opinion Monthly Panel July 2020



Future ridership: Implications if current mode-share persists

- For trips still being made in person, work trips have maintained a consistently higher mode-share throughout the pandemic, even as the volume of trip-making has increased across trip purposes.
- This makes employers' decisions to return to the physical workspace the most critical piece for forecasting jumps in ridership.

Current Activity for Riders Who Previously Made Trips on the MBTA by Trip Purpose



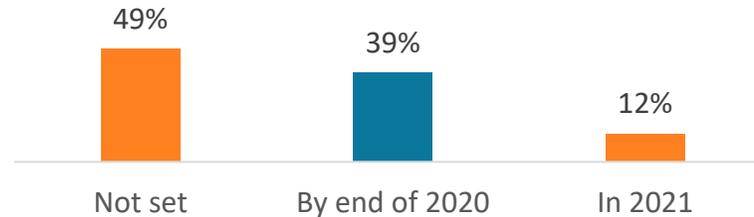
Source: MBTA Customer Opinion Monthly Panel July 2020



Planning a return to the physical workspace: Short-term (some organizations planning to return when feasible)

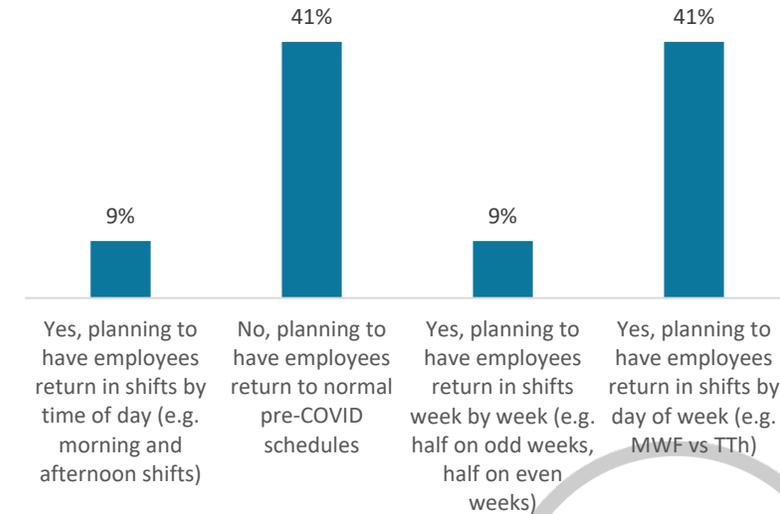
- Organizations that are planning to return soon are factoring in the state phased re-opening plan, and school and childcare availability.
- Look for a jump in road and transit travel when organizations are cleared for full occupancy, followed by more gradual return until a vaccine is widely available.
- Organizations planning to return soon are about equally likely to return to normal pre-COVID schedules and in Day of Week pattern. This should result in a volume jump with daily peak-hour travel by the employees at these organizations.

Many organizations have no target return date yet; about 40% show a desire to return soon



Similarly, MACP survey estimated that 21% of employees would return by Labor Day and that 39% would return by end of 2020

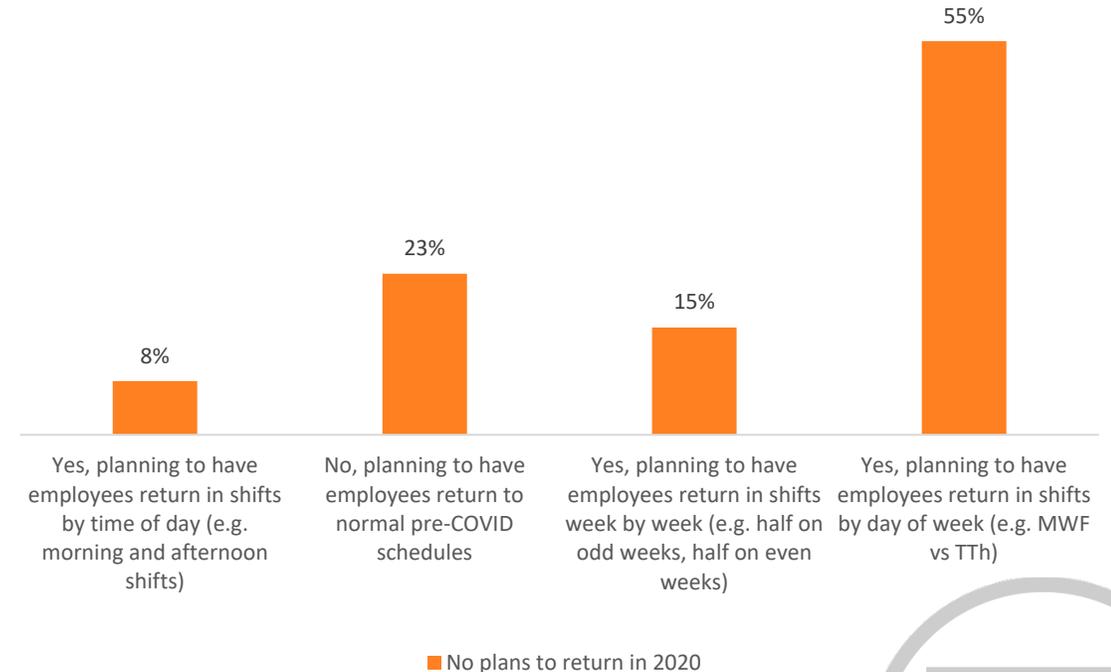
Organizations that want to return soon are split between returning to pre-COVID schedules and returning in Day of Week pattern



Planning a return to the physical workspace: Longer-term return patterns (after vaccine)

- Half of the reporting organizations are uncertain about their return date, and report waiting for medical advancement
- Expect a second jump in travel with medical advancement
- Organizations that are waiting for medical advancement much more likely to lean toward Day of Week return pattern
- Implications for congestion on both roads and MBTA: primarily peak commuting even if not at 100% every day to start

Organizations that have no plans to return in 2020 much more likely to have a Day of Week return pattern



Planning a return to the physical workspace: Large employers are going to drive commute patterns

- Large employers affect more employees, so when large employers are making substantially different choices, the effects on individual volumes and travel patterns are higher
- About two thirds of large employers in the dataset do not plan to return in 2020
- Over half of large employers will not be returning all teleworking employees to the physical workspace
 - Consistent with MACP survey, which surveyed many larger employers and found that the employers expect about half of their employees to stay remote at least some of the time even after a vaccine is developed

Larger organizations more likely to have only some teleworking employees return to the physical workspace

■ Small: 1-19 employees ■ Medium: 20-99 employees ■ Large: 100+ employees

