



Shaping The Future of GRTC's Transit System



Shaping The Future of

RVA



Update on GRTC's Strategic Planning Research



Overall Goals

2 Overall Goals

1. Identify immediate ways to improve GRTC's current transit services.
 - Identify ways to get more people on board GRTC's existing transit services today.
 - Identify targeted areas where GRTC can help address transportation-related challenges.
2. How GRTC can help the RVA region to move forward.

GRTC Realities

- GRTC's service primarily serves three jurisdictions today.
- Funding comes from fare box (20%) and the balance from localities and the state
- Adding any new additional service cost money.
- Changing any service requires a complex, very transparent process.
- Not everyone understands the opportunity in front of us.

Research Findings

GRTC Rider Study Findings

Survey Methodology

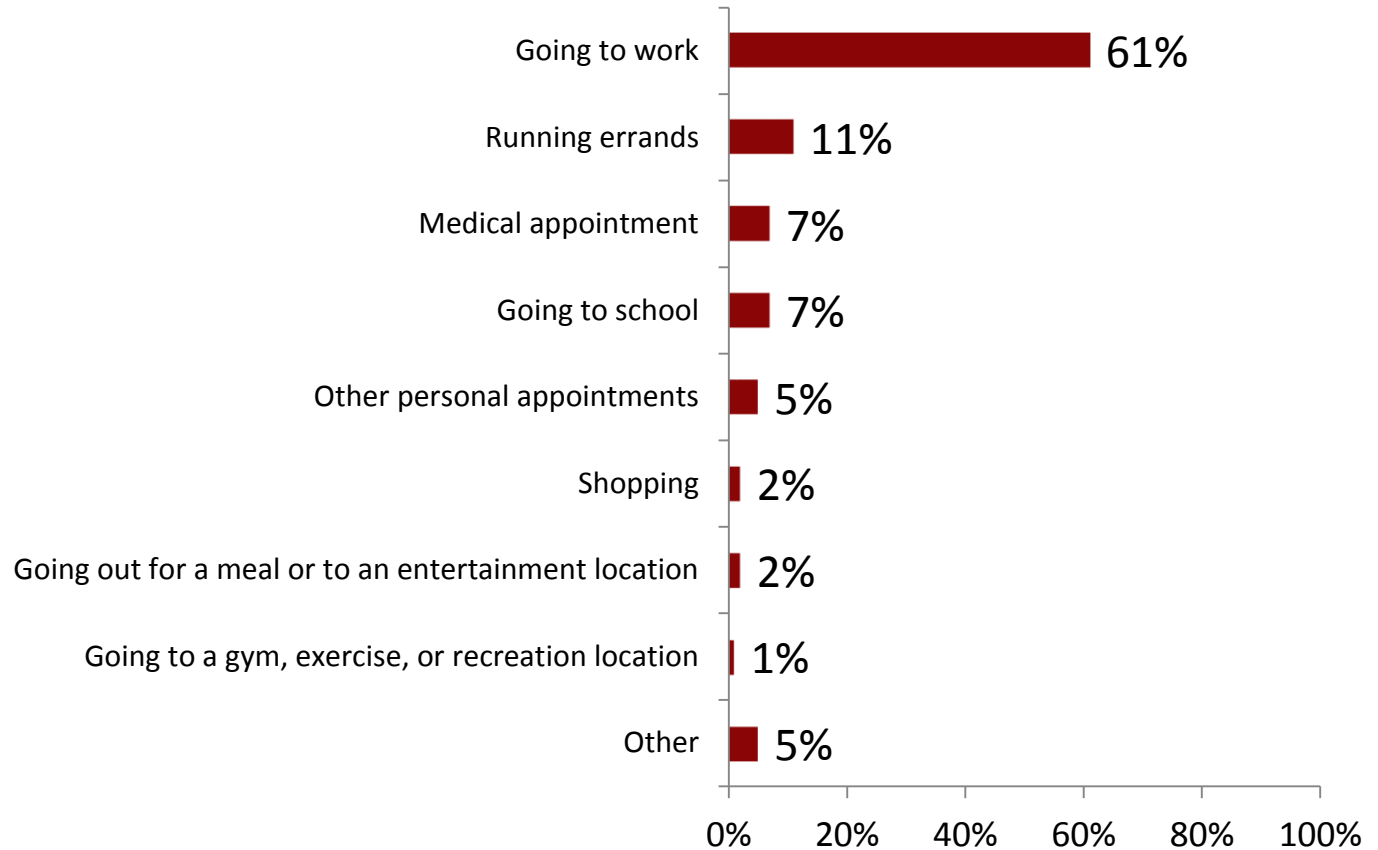
- A 50-question onboard survey, created by SIR and approved by GRTC, was conducted among GRTC's current riders.
- Fieldwork was conducted from April 2–May 6, 2015.
- Riders were incentivized with a GRTC Go Card valued at \$5.
- A total of 1,519 completed surveys were collected among riders on 24 GRTC routes, including 18 local and 6 express routes. The routes sampled were identified by GRTC.



GRTC Gets People to Work

Three in Five Riders' Primary Purpose for Riding the Bus Is Going to Work

Note:
Almost four in ten riders (38%) were riding the bus exclusively to go to work.



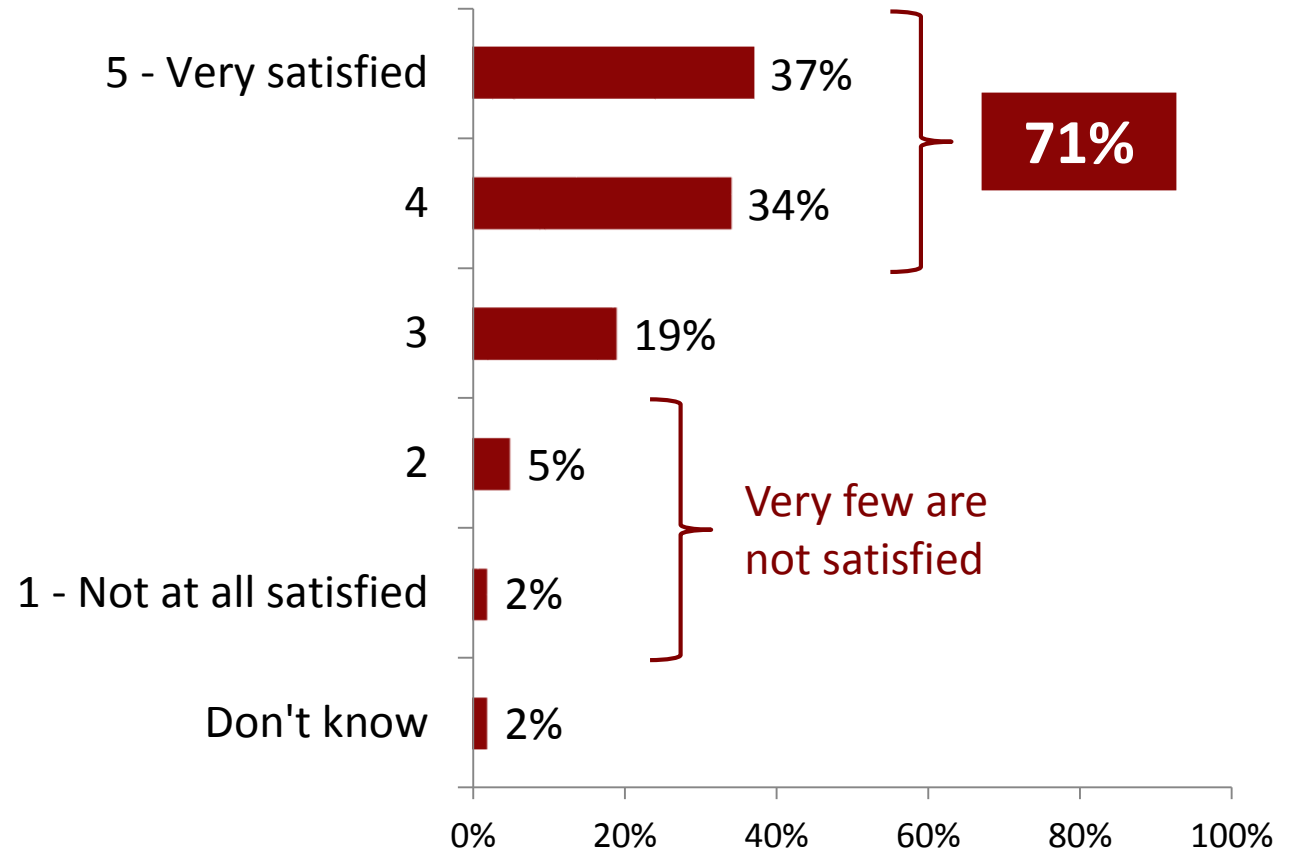
Q1. What is the primary purpose of your trip today?

2

Current Riders Are Satisfied with GRTC's Service

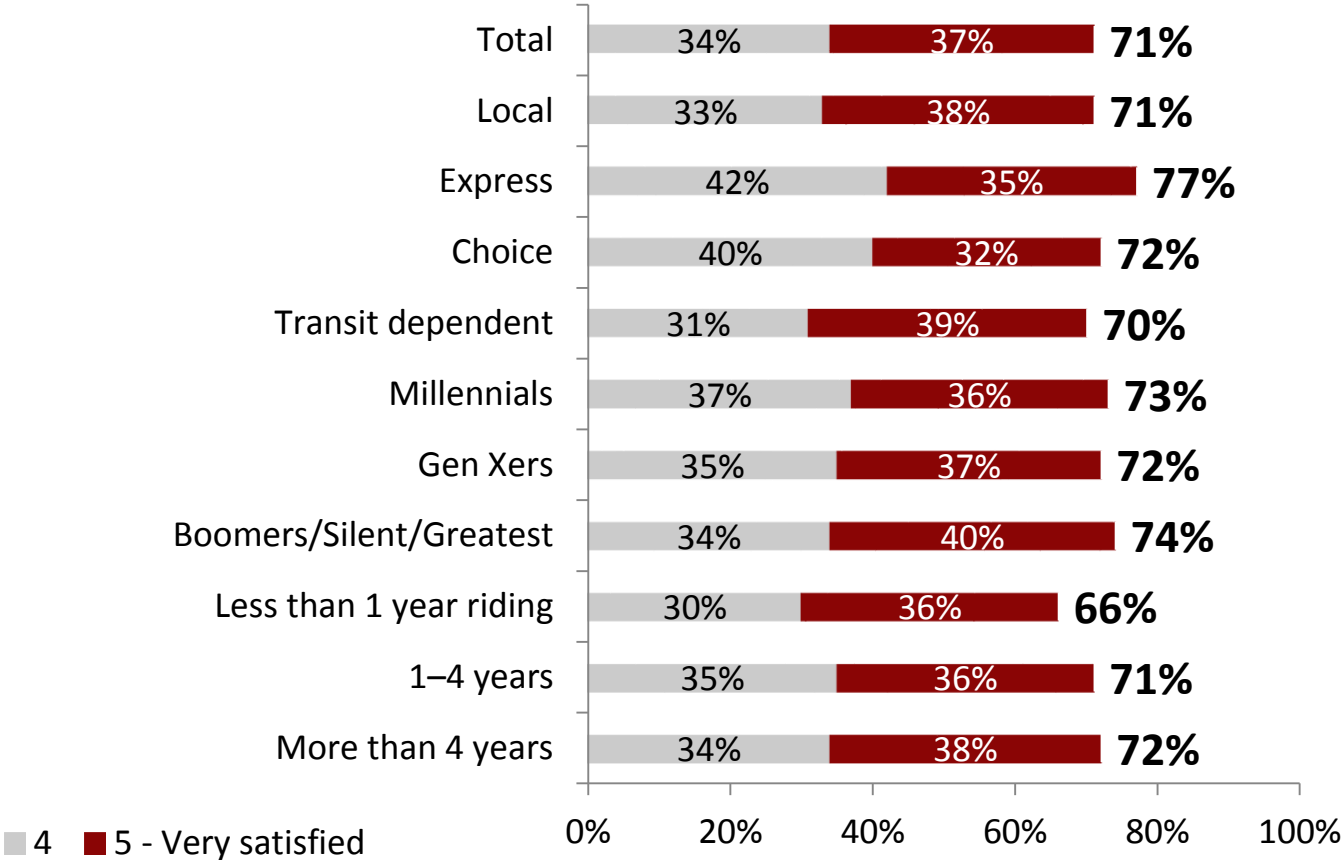
Note:
There is very little
dissatisfaction
among current
riders (7%).

Seven in Ten Riders Are Satisfied with Their Experience with GRTC



*How satisfied are
key sub-segments
of GRTC riders?*

Satisfaction with GRTC Is Relatively Consistent Across All Categories

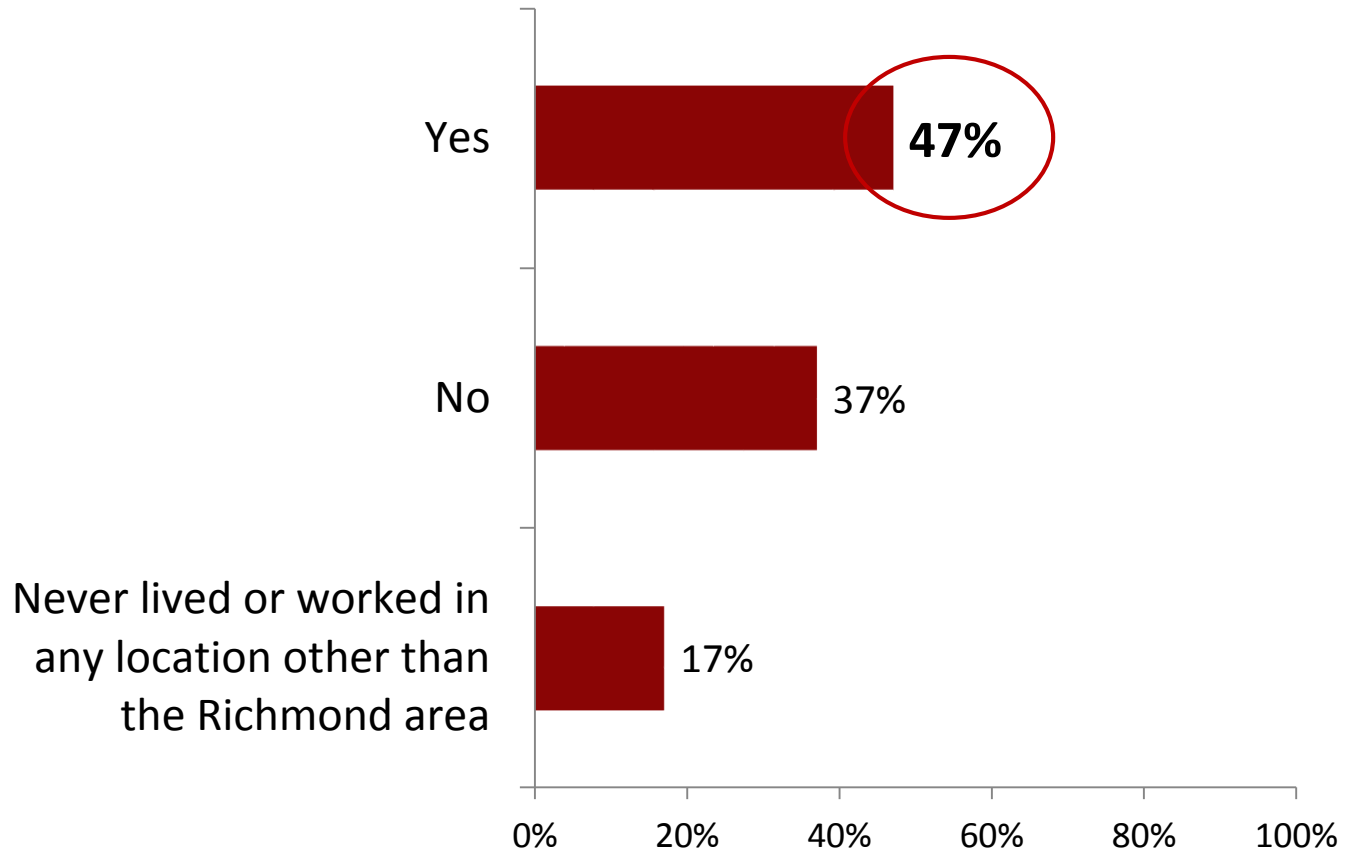


Q23. Overall, how satisfied are you with your experience with GRTC?



*How does GRTC compare
to other city bus systems?*

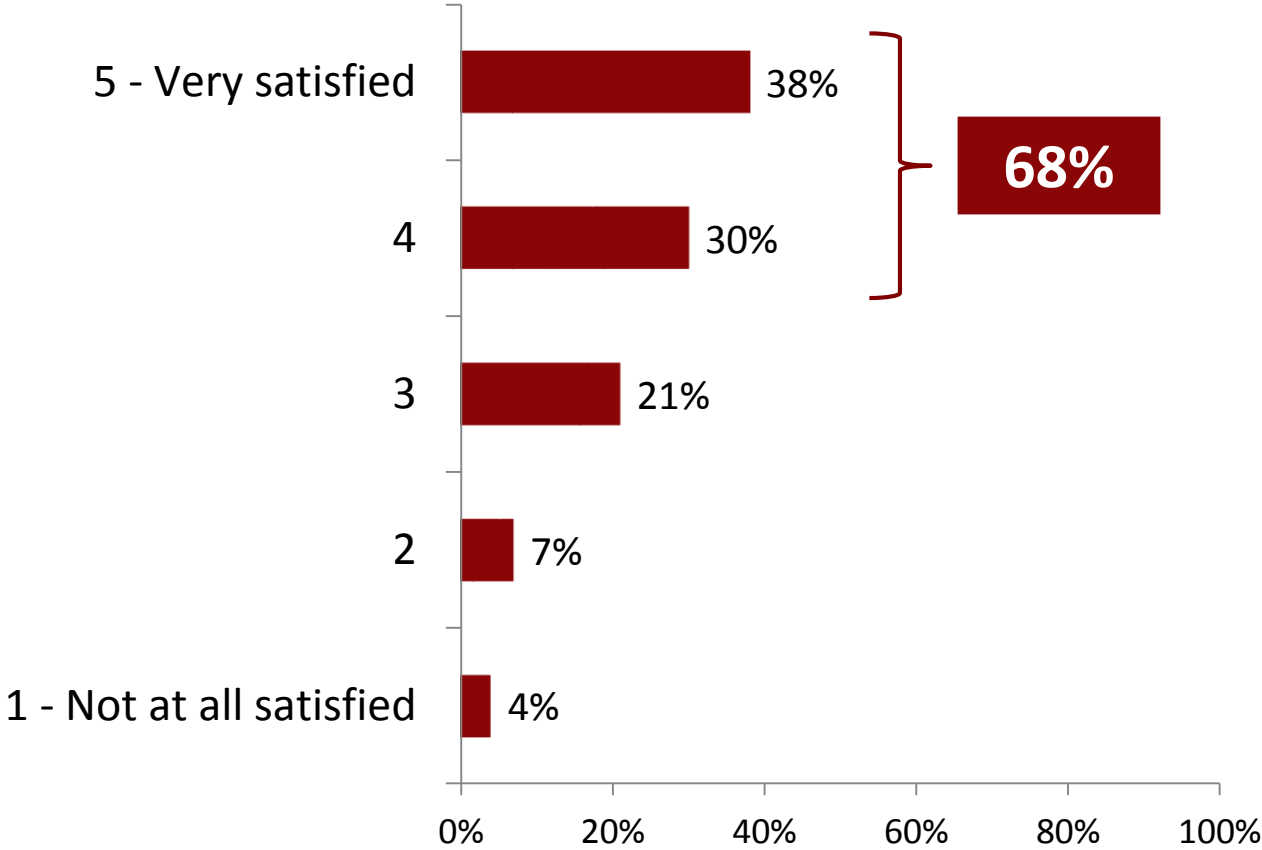
Approximately Half of Riders Have Ridden a Bus Outside of the Richmond Area



Q21. Have you ever ridden a bus in locations (cities or towns) other than the Richmond area, where you have lived or worked?

Note:
Question asked of those who indicated they had ridden a bus in locations other than the Richmond area in Q21.

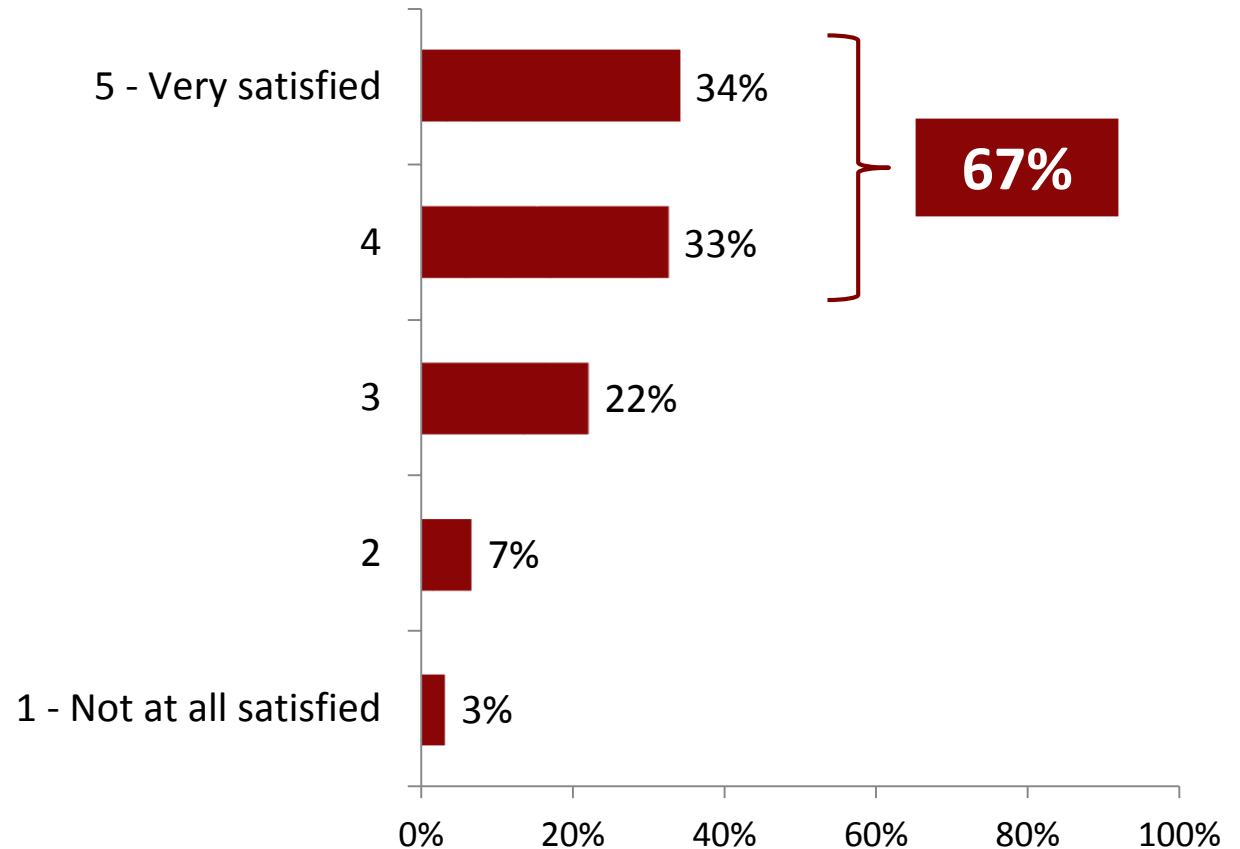
Over Two-Thirds of Riders Who Have Ridden Buses Elsewhere Were Satisfied with That Previous Service



n = 666



GRTC's Current Riders with Transit Experience in Other Markets Are Satisfied with GRTC



Q21. Have you ever ridden a bus in locations (cities or towns) other than the Richmond area, where you have lived or worked?

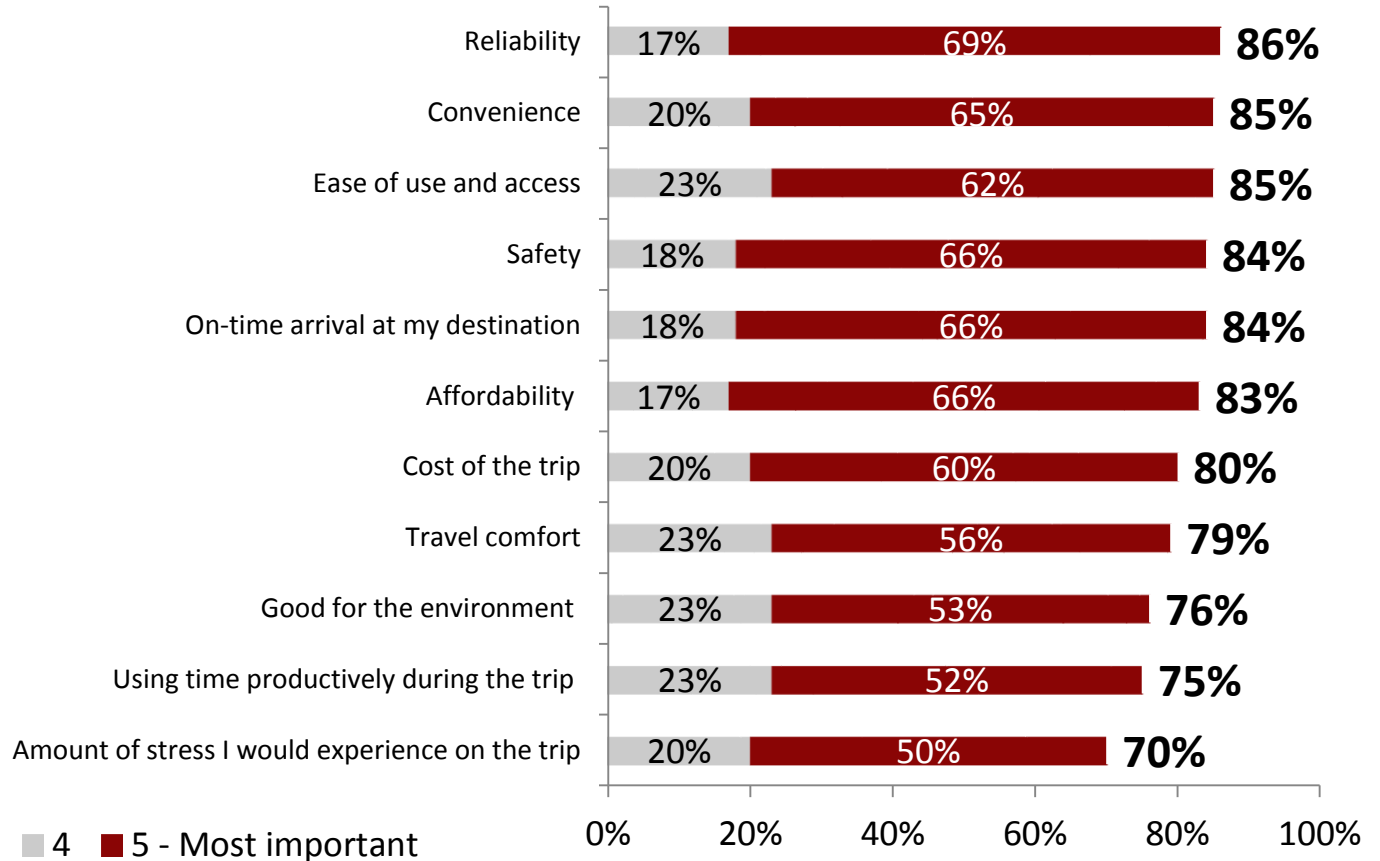
Q23. Overall, how satisfied are you with your experience with GRTC?

3

**Riders Have Many Clear
Expectations
for GRTC's Service**

All Riders

Reliability, Convenience, and Ease of Use and Access Are the Most Important Travel Attributes



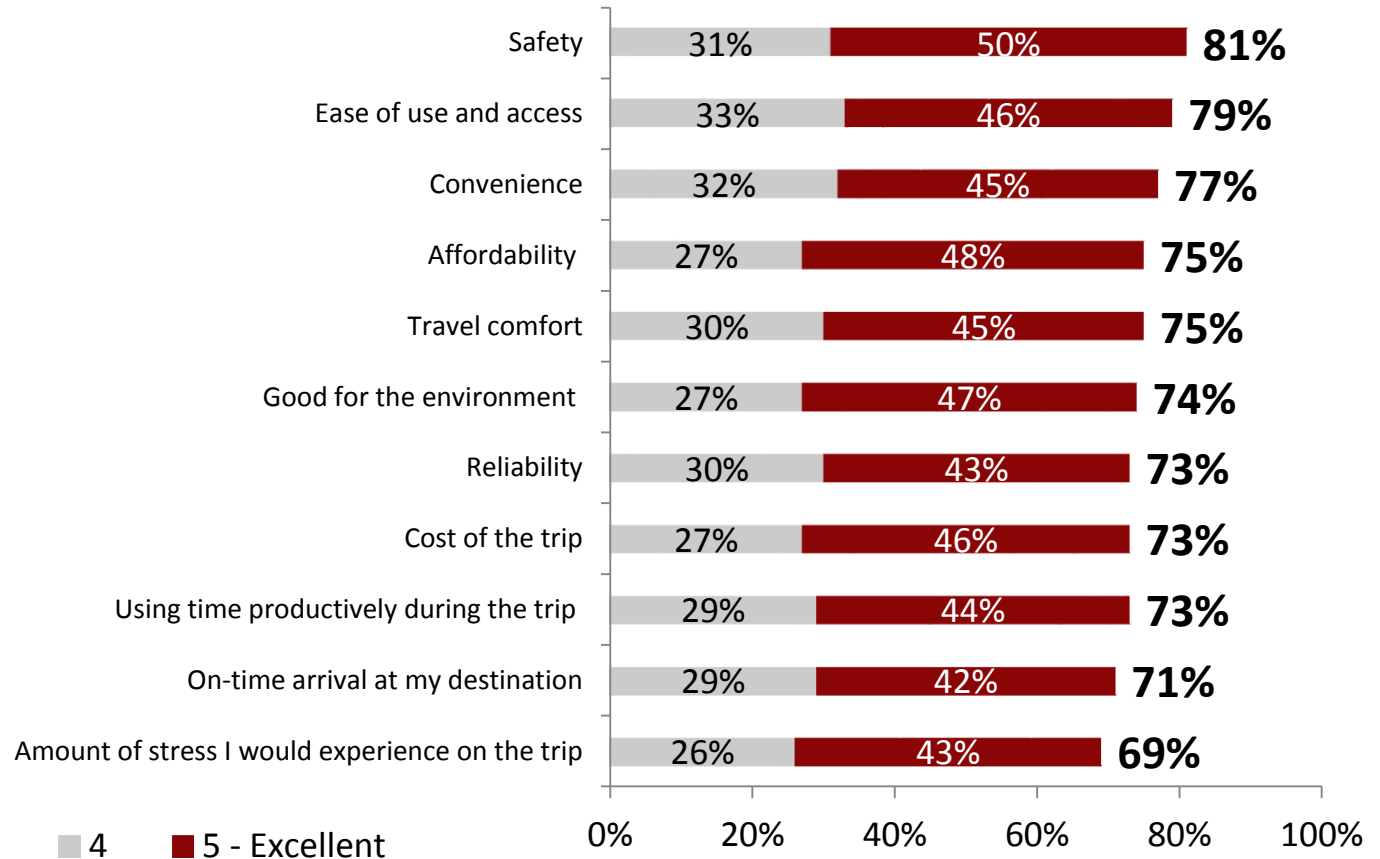
Q25. How important to you is each of the following attributes when you are choosing the way you travel around the Richmond area?

4

GRTC Performs Well on Many of These Travel Expectations

All Riders

Riders Rate GRTC as Performing Best on Safety, Ease of Use and Access, and Convenience



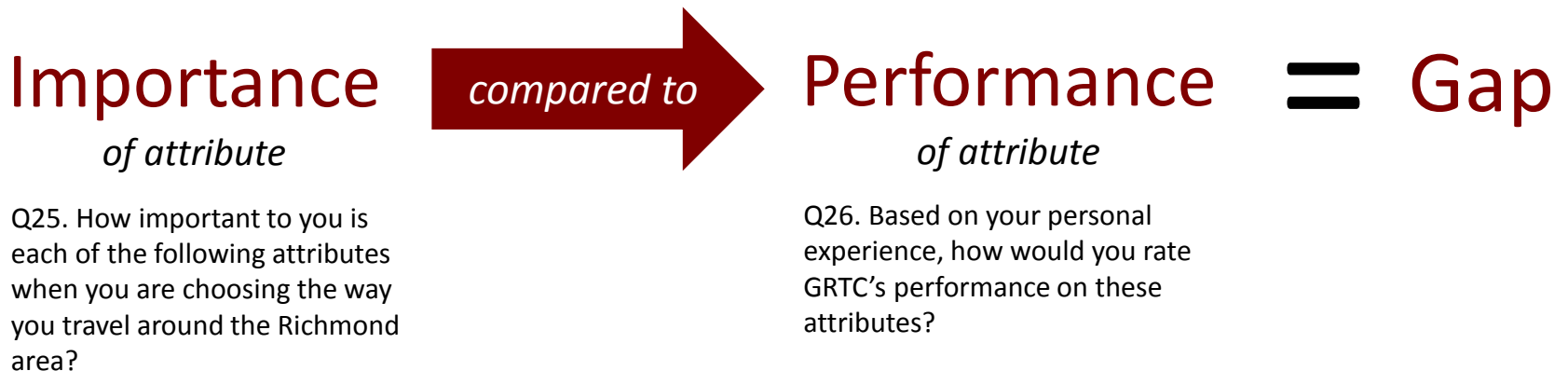
5

While GRTC Performs Well on Many Expectations, There Are a Few Areas to Focus on—Especially Reliability and On-Time Arrival

Identifying Focus Areas Through a Gap Analysis

Expectation and Performance

The first step in identifying areas of opportunity is to look at *gap analysis*. This gathers ratings of what respondents find important when it comes to their choice of travel mode—their expectation. The process then follows up by asking respondents how well those various attributes actually describe GRTC—its performance.



Please note:
Percentages
represent top two
box ratings of “4”
and “5” from Q25
(importance) and
Q26 (performance).

All Riders

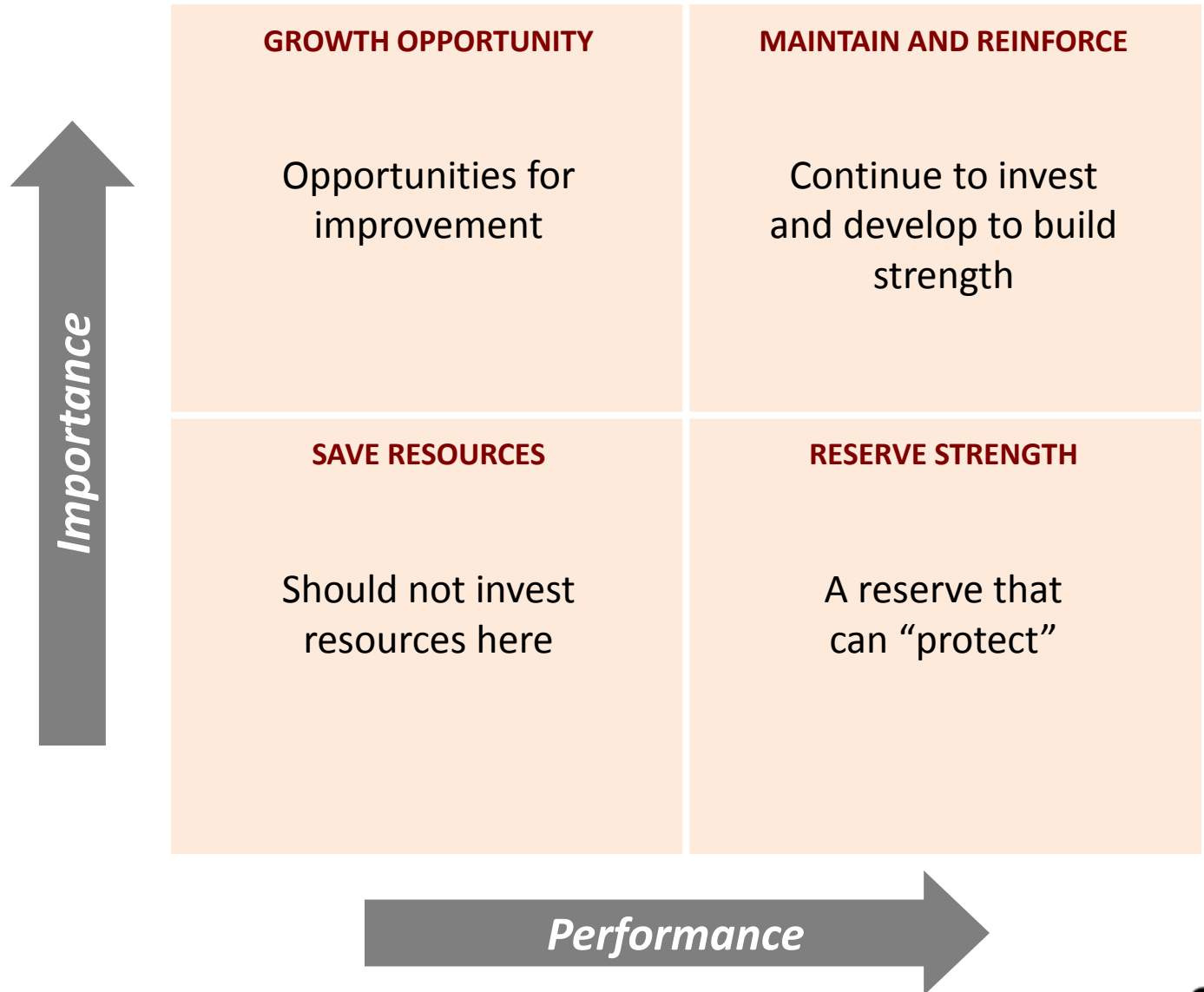
GRTC’s Largest Gaps Are for Reliability and On-Time Arrival

Attribute	Importance	Performance	Gap
Reliability	86%	73%	-13
Convenience	85%	77%	-8
Ease of use and access	85%	79%	-6
Safety	84%	81%	-3
On-time arrival at my destination	84%	71%	-13
Affordability	83%	75%	-8
Cost of the trip	80%	73%	-7
Travel comfort	79%	75%	-4
Good for the environment	76%	74%	-2
Using time productively during the trip	75%	73%	-2
Amount of stress I would experience on the trip	70%	69%	-1

SIR note: Rarely does performance exceed expectation.
Thus, gaps under 10 points are not usually a concern.

This map helps illustrate how satisfaction and perceived performance on attributes can highlight strengths and opportunities.

Understanding the Opportunity Map



All Riders

GRTC's Growth Opportunities Are Also for Reliability and On-Time Arrival

Attributes by quadrant:

Maintain and reinforce strengths that are important.

Reserve strengths tend to be niche attributes, important to small market segments.

Save resources on attributes that are limitations, but not as important to the market.

Growth opportunities are important to respondents but not rated highly; this is where you focus for the greatest ROI.



GROWTH OPPORTUNITY

- Reliability
- On-time arrival at my destination

MAINTAIN AND REINFORCE

- Convenience
- Ease of use and access
- Safety
- Affordability

SAVE RESOURCES

- Cost of the trip
- Good for the environment
- Using time productively during the trip
- Amount of stress I would experience on the trip

RESERVE STRENGTH

- Travel comfort

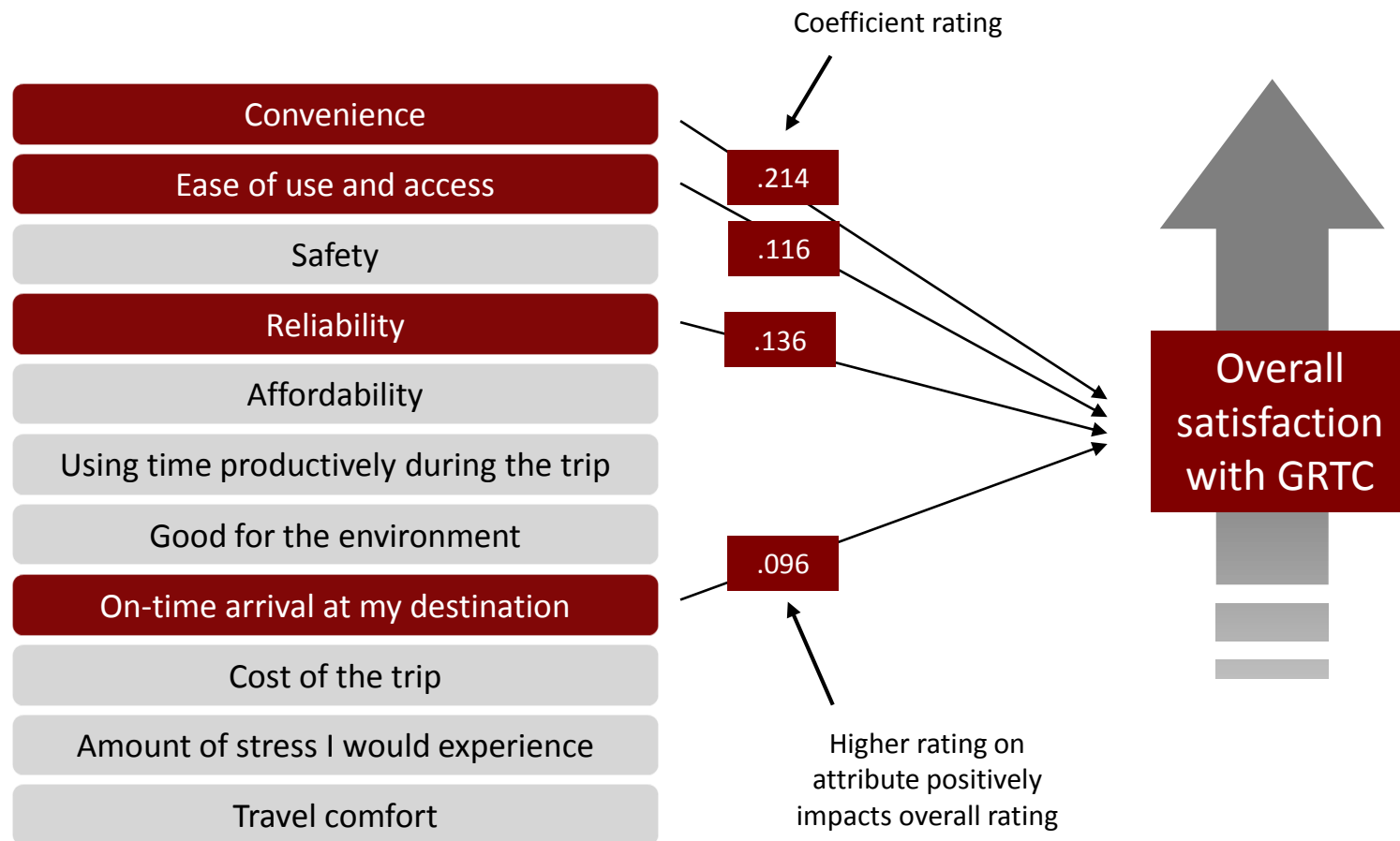


Regression Analysis

Statistical regression analysis models data to explore and identify any linkages between how people rated overall measures related to specific performance variables. This process looks for relationships or predictors where a higher rating on an attribute positively or negatively impacts the overall rating.

All Riders

Convenience, Reliability, Ease of Use and Access, and On-Time Arrival Are Drivers of Overall Satisfaction with GRTC



n = 1,007

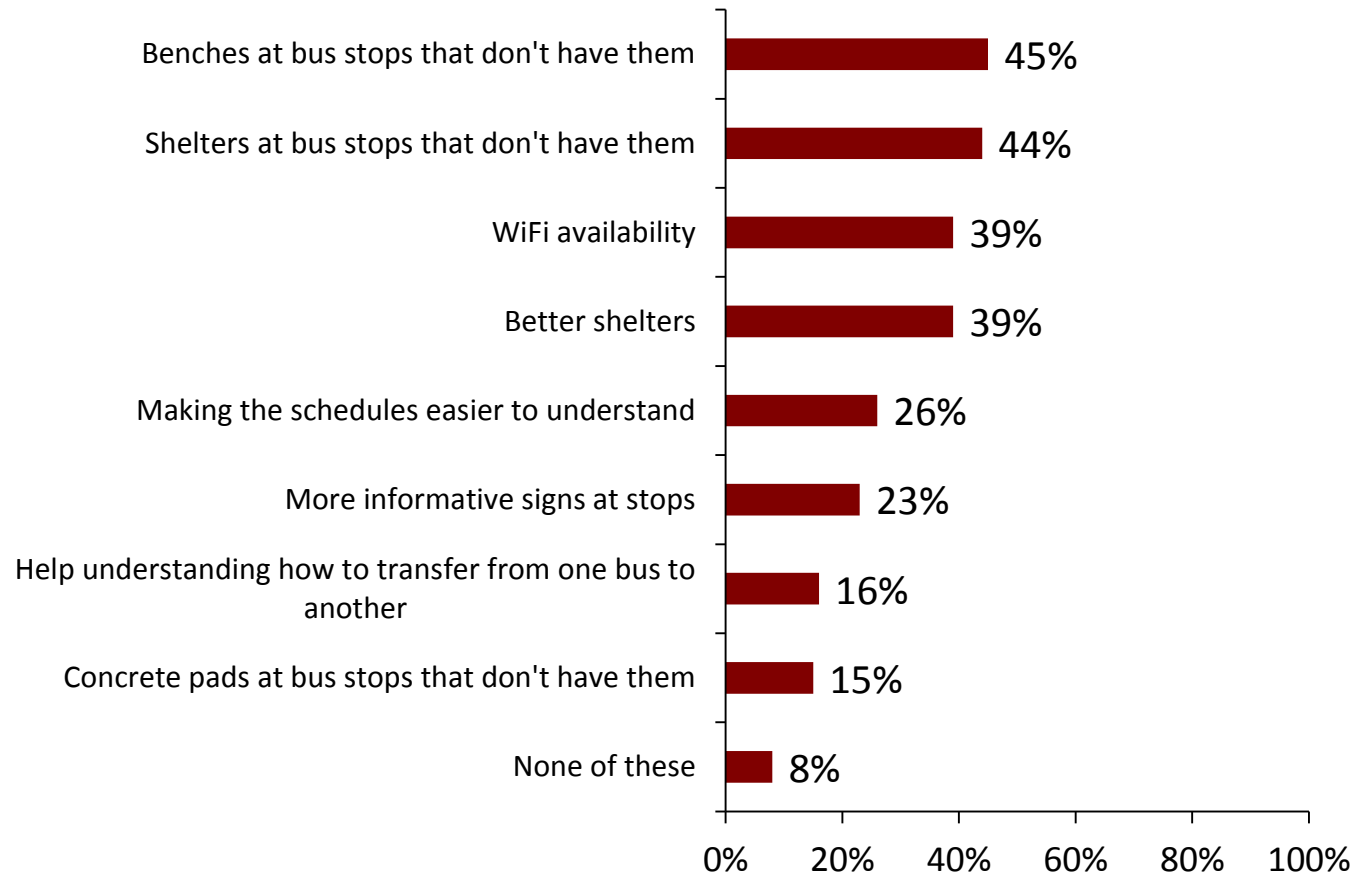
6

Current Riders Have Definite Ideas and Suggestions for GRTC's Improvements and New Service Concepts

*“Which of the following
do you think GRTC needs to do
to improve your experience?
Please select all that apply.”*

All Riders

The Two Most Requested GRTC Improvements Are Adding Benches and Shelters at Bus Stops



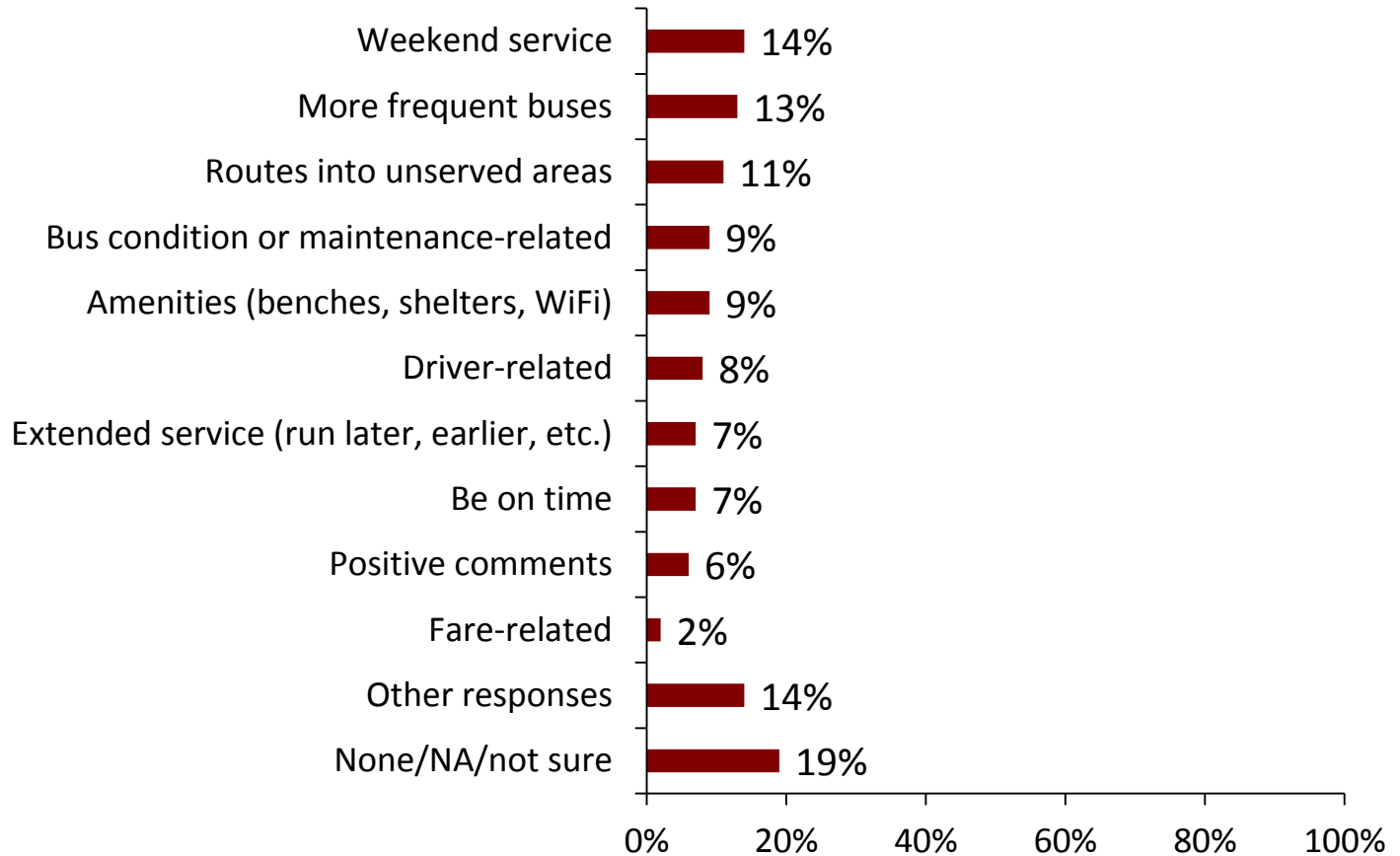
Q32. Which of the following do you think GRTC needs to do to improve your experience? Please select all that apply.

*“What suggestions
do you have to **improve**
GRTC overall?”*

Note:
Categories were created based on coded open-ended responses. Meaningful responses were coded into multiple categories, so percentages do not add to 100%.

Open Ended

While Riders Had a Wide Variety of Suggestions to Improve GRTC, the Top Ranked Are Weekend Service and More Frequent Buses



*“If you were given the following **choices to improve GRTC**, which one would you rank first, which second, and so on? Please put a ‘1’ by your first priority, a ‘2’ by your second priority, and so on, until you rank all eight choices.”*

Aided List

Riders Rank Shorter Wait Times and More Frequent Buses as Top Priorities for GRTC Improvements

- 1. Shorter wait times**
- 2. More frequent buses**
- 3. More frequent weekend service**
4. Weekend service on currently unserved routes
5. More express bus options
6. Serve more destinations
7. Real-time information on the arrival of the next bus available
8. Circulator buses

Q34. If you were given the following choices to improve GRTC, which one would you rank first, which second, and so on? Please put a "1" by your first priority, a "2" by your second priority, and so on, until you rank all eight choices.

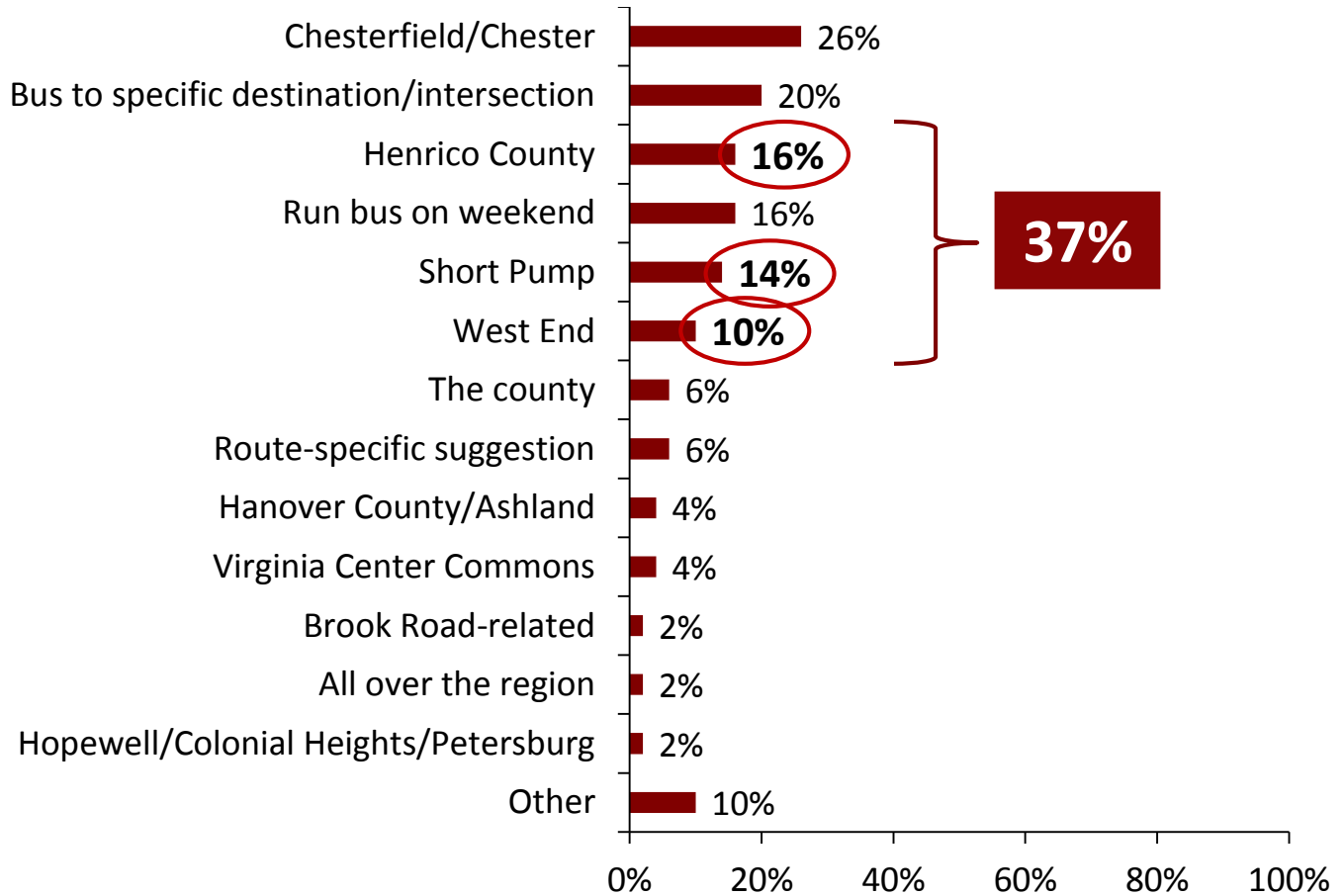
*“Now please consider areas of the region where GRTC is not currently offering service. **Where specifically would you like GRTC to offer new service?”***

Note:
 Categories were created based on coded open-ended responses. Meaningful responses were coded into multiple categories, so percentages do not add to 100%.

Note:
 Support for Henrico County (37%) is made up of those who mentioned the county specifically, Short Pump, and/or the West End.

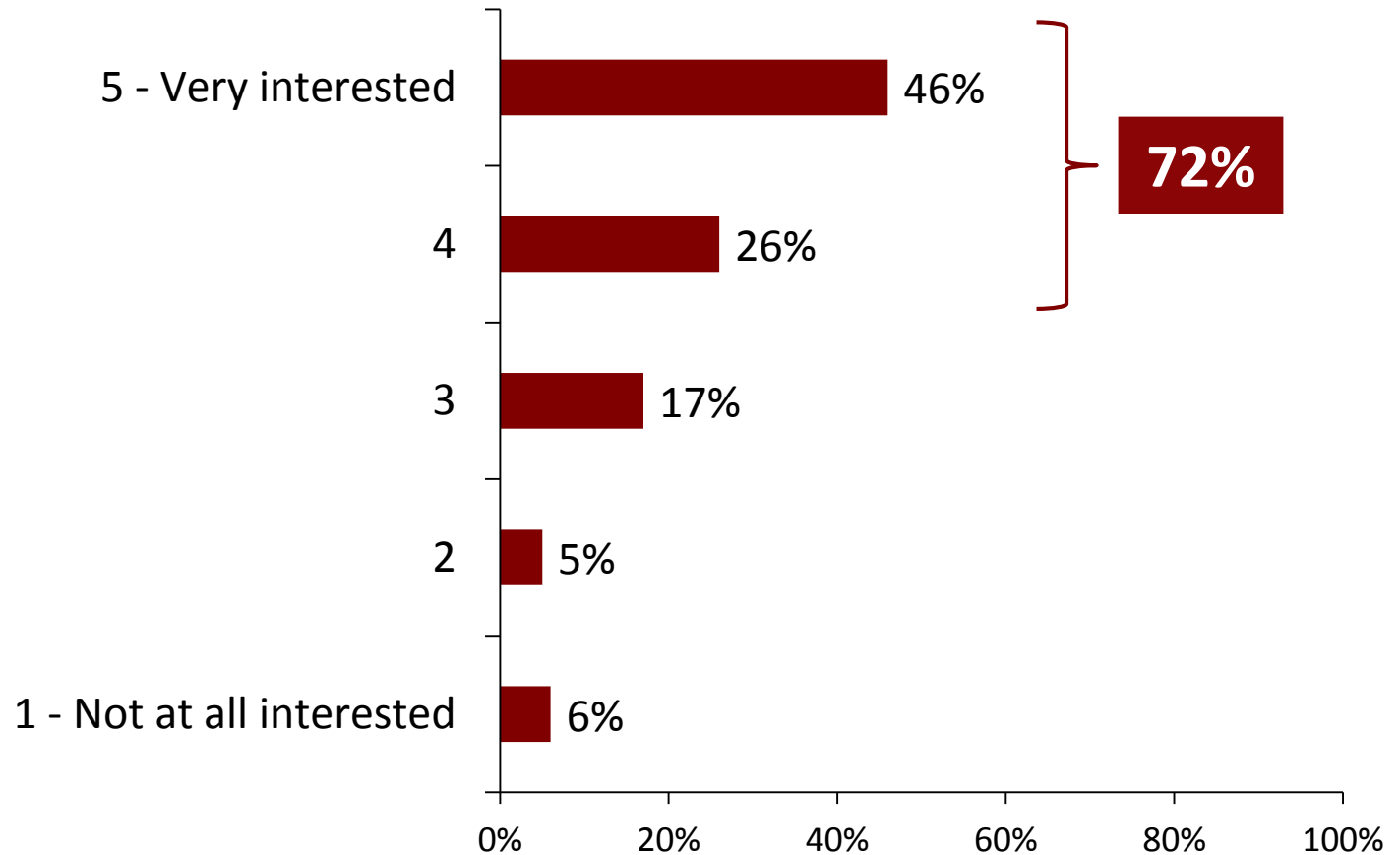
Over a Third of Riders (37%) Would Like GRTC to Offer New Service to Parts of Henrico

Over a Quarter (26%) Would Like Service to Chesterfield and Chester

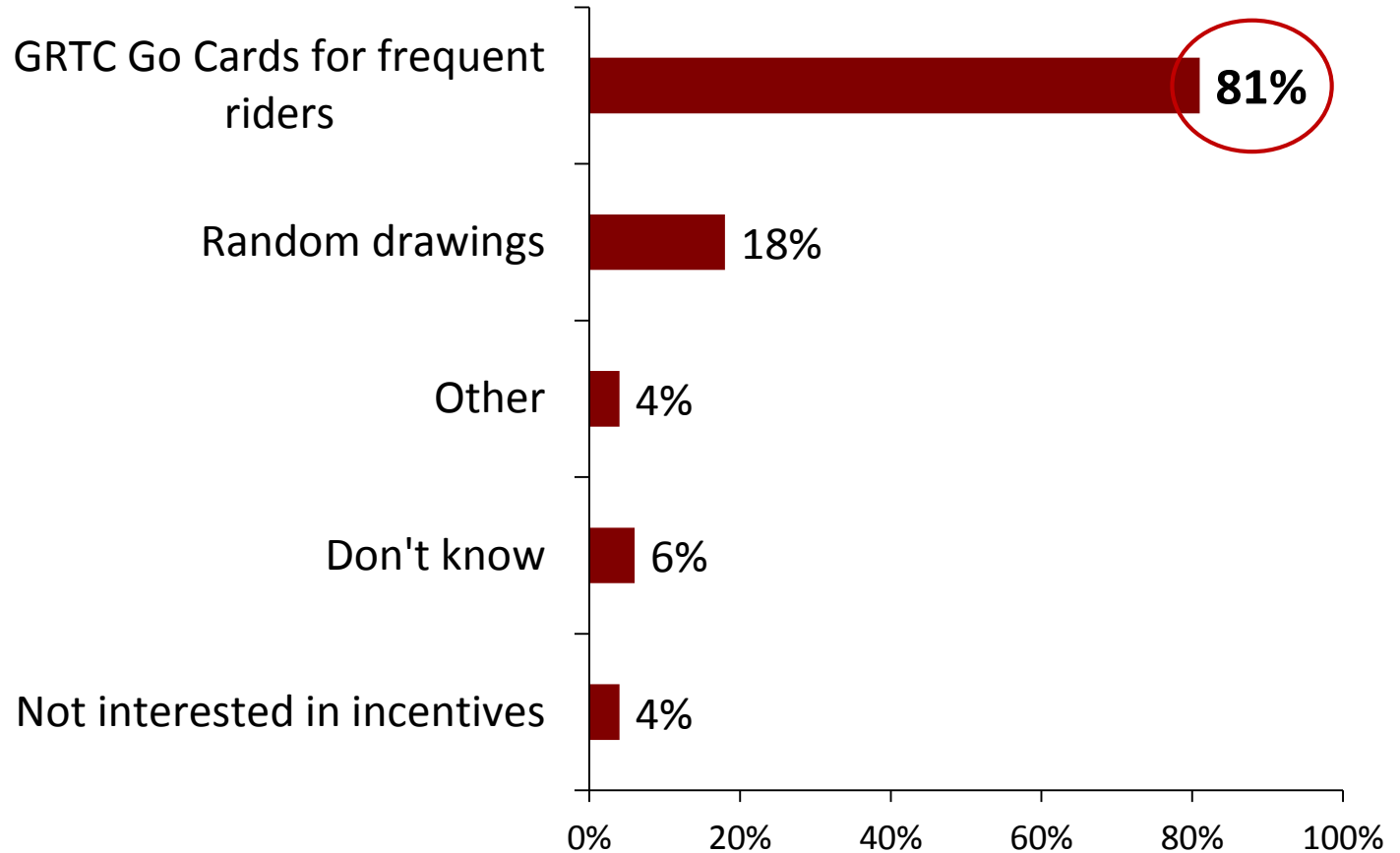


Q33. Now please consider areas of the region where GRTC is not currently offering service. Where specifically would you like GRTC to offer new service?

Over Seven in Ten Riders Are Interested in a Rewards or Incentives Program



Over Four in Five Riders Are Interested in GRTC Go Cards as Rewards or Incentives



GRTC Action Items

1. On time arrivals and reliability
2. Better communication
 - Mobile App
 - Customer service center
 - Web site
3. Bus cleanliness
4. Improving bus stops
5. Exploring Frequent Rider Rewards /Incentives
6. Exploring onboard wifi
7. Explore more weekend service

Regional Resident / Prospective Rider Study Findings



Expanded Transit Service Is A Community Need

Transit Is an Important Community Need in All Regions

	Total	City of Richmond	Henrico	Chesterfield
Enhanced economic development	89%	88%	90%	88%
Improved quality of K–12 education	89%	92%	88%	87%
Reduction in poverty	82%	84%	81%	80%
Expanded access to quality children’s healthcare	81%	85%	80%	79%
More comprehensive pre-K education	79%	85%	78%	77%
Expanded access to quality adult healthcare	77%	83%	77%	73%
More effective workforce training	75%	77%	77%	71%
More affordable housing options	73%	79%	72%	70%
Expanded transit service across the region	73%	79%	73%	69%

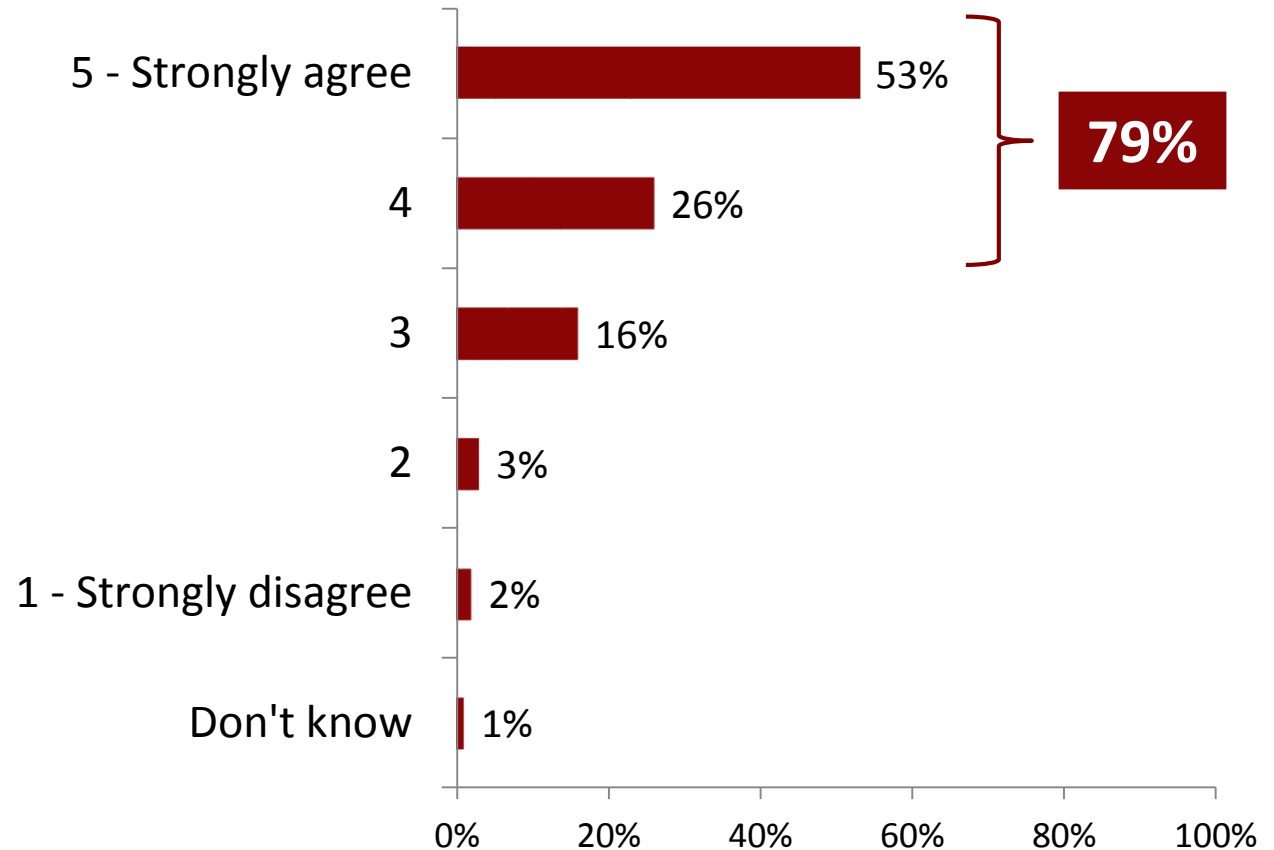
Please note: Percentages represent top two box ratings of “4” and “5” from Q4.

Q4. How important are each of these community needs today?

2

**The Majority of Residents
Feel Transit Services
Would Improve the
Region's Quality of Life**

More than Three-Quarters of Residents Believe That Transit Service Improves the Overall Quality of Life of Residents Living in Our Region

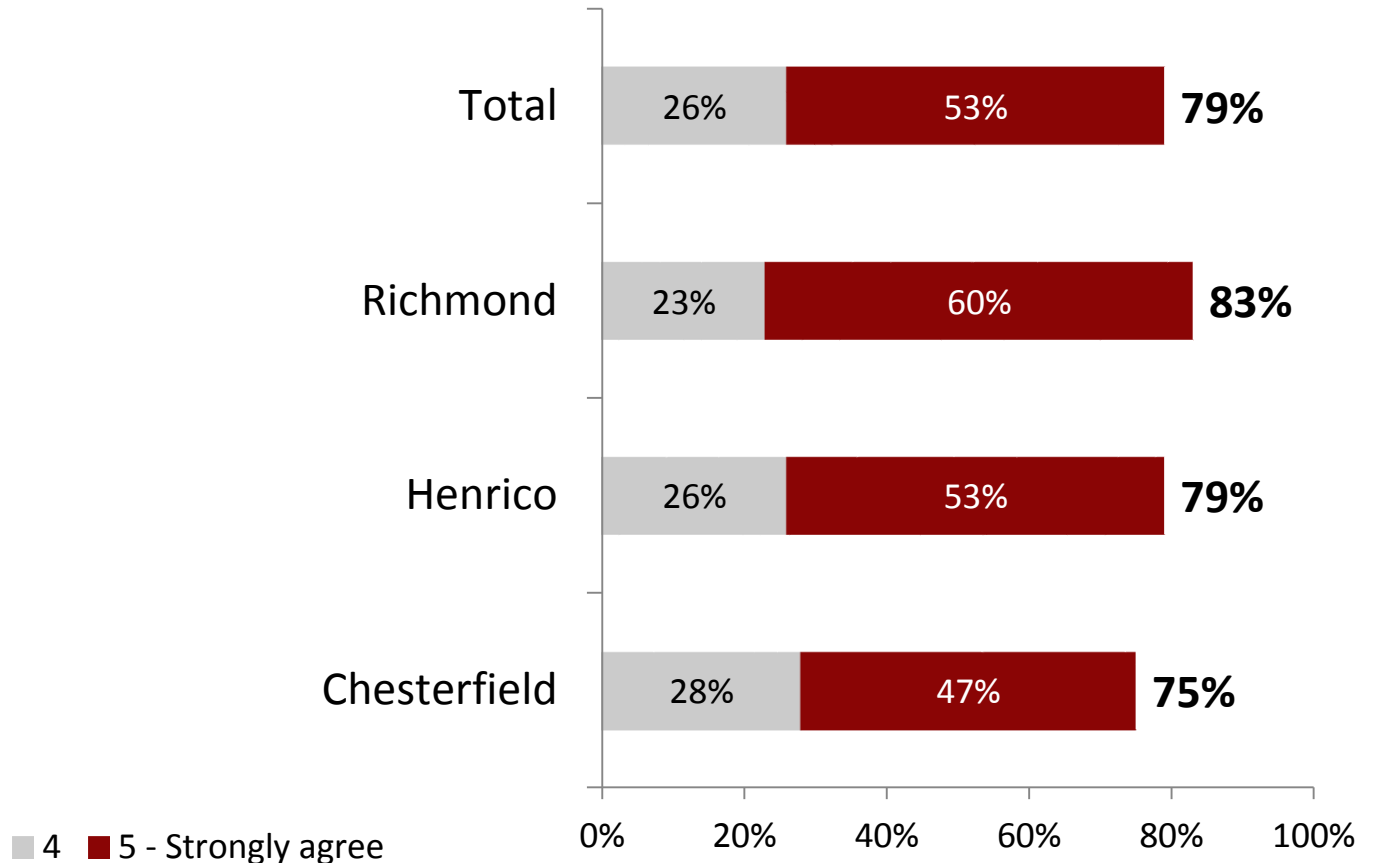


Q30. How much do you agree or disagree with the following statement: Bus service improves the overall quality of life of residents living in our region.

Note:
Employed residents
are LESS likely to
agree with the
statement than are
those who are not
employed.

Employed: 77%
Not employed: 84%

Richmond and Henrico Residents Are More Likely to Agree That Bus Service Improves the Overall Quality of Life of Residents than Are Chesterfield Residents



Q30. How much do you agree or disagree with the following statement: Bus service improves the overall quality of life of residents living in our region.

3

**By and Large, GRTC
Transit Services Have
a Positive Reputation**

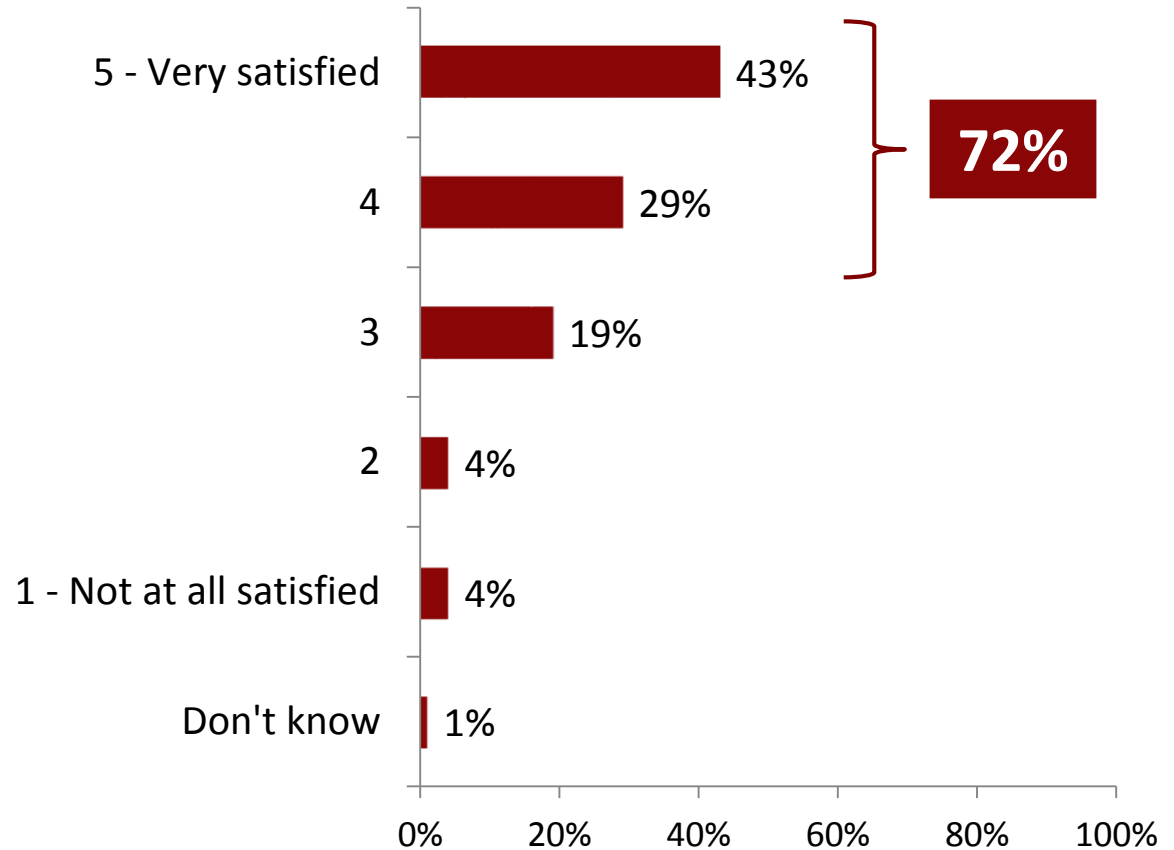
Almost Three-Fourths of Residents Who Have Ridden Buses Previously in Richmond Were Satisfied with That Experience

Note:
Transit choice riders reported higher satisfaction with their riding experience in Richmond than did transit-dependent riders.

Percentage who were satisfied:

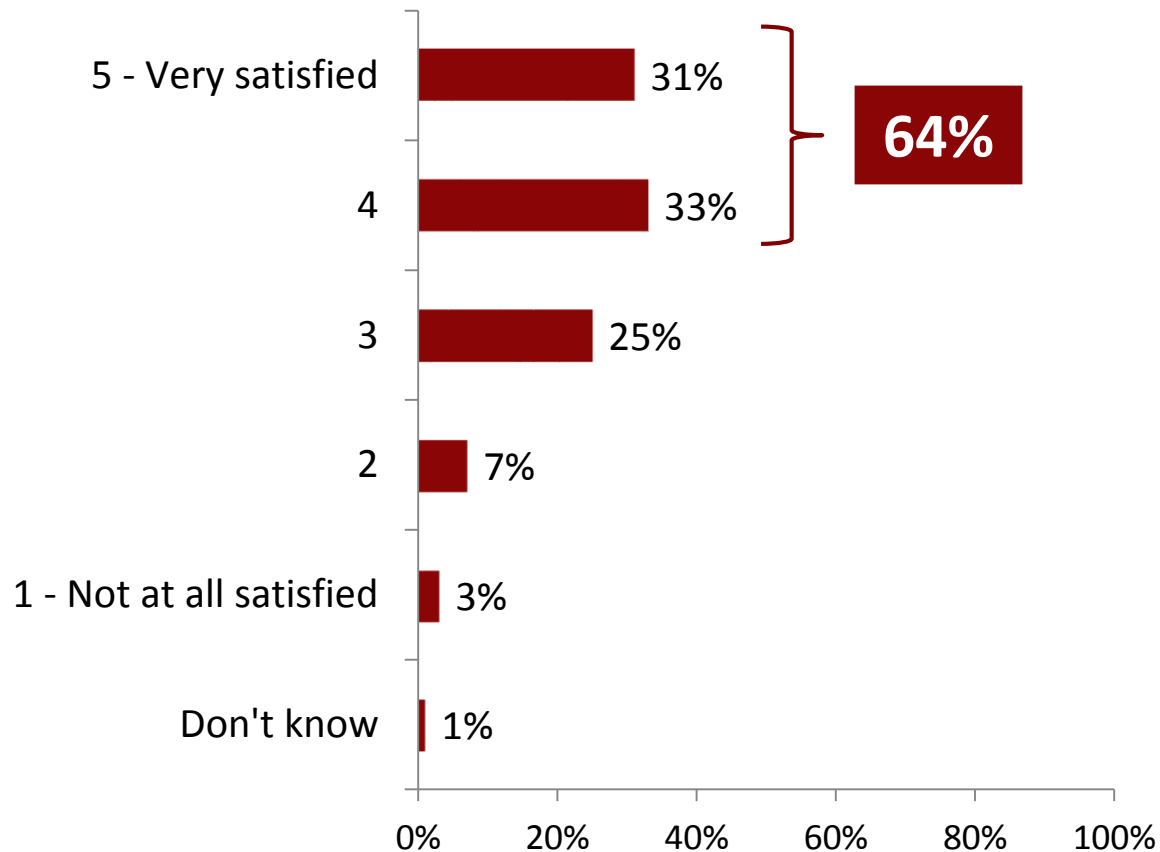
Dependent: 67%

Choice: 74%



Note:
Slide represents
responses of
residents who have
ridden a public bus
in other cities or
towns.

Almost Two-Thirds of Residents with Transit Experience Were Satisfied with Their Riding Experience in Richmond



Q23. Have you ever ridden a public bus in the past in Richmond or in other cities or towns where you have lived or worked?

Q24. How satisfied were you with that previous bus-riding experience in Richmond?

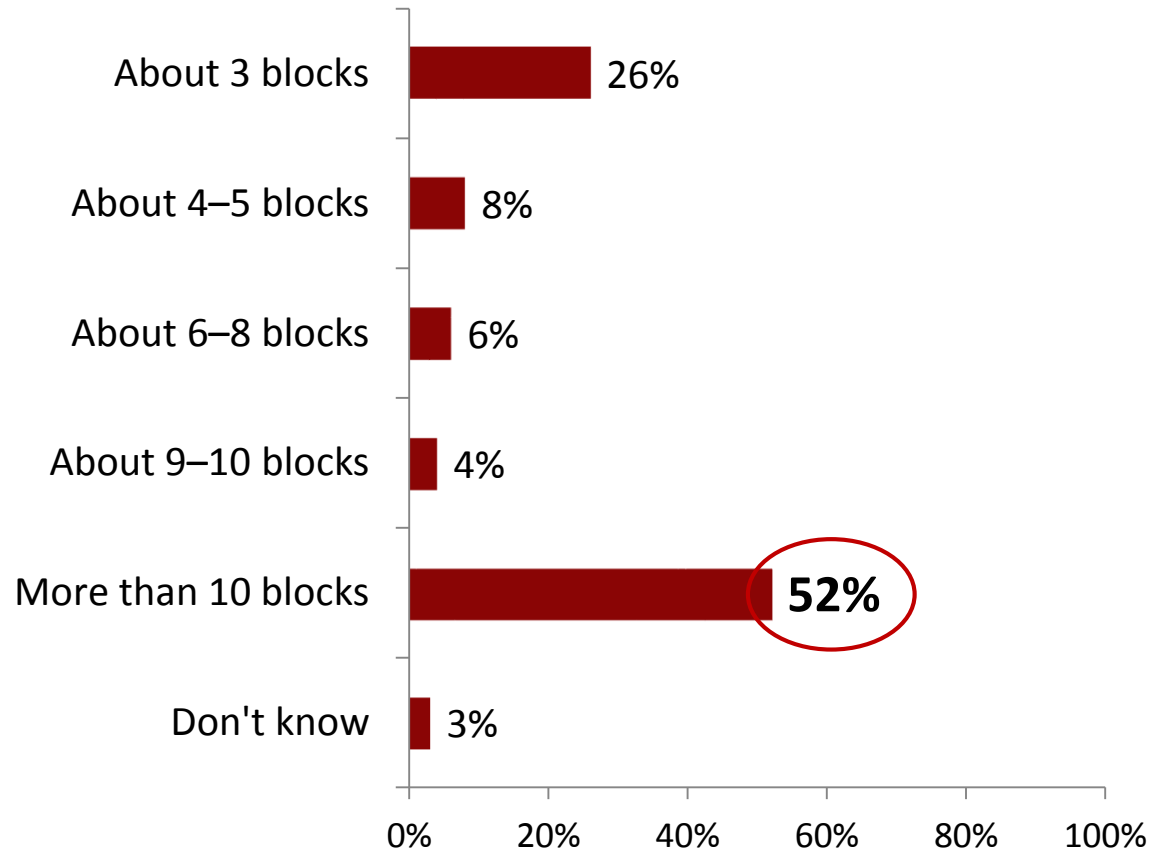
4

**Today, Transit Services
Are Not Accessible to Many
or Aren't Frequent Enough
to Work**

Slightly More than Half of Residents Live More than One Mile from a GRTC Bus Stop

Note:
Question was asked among those aware of a GRTC bus stop close to their home in Q17.

Note:
Employed and non-employed residents had about equal access.
Percentage of residents within five blocks of bus stop:
Employed: 34%
Not employed: 38%

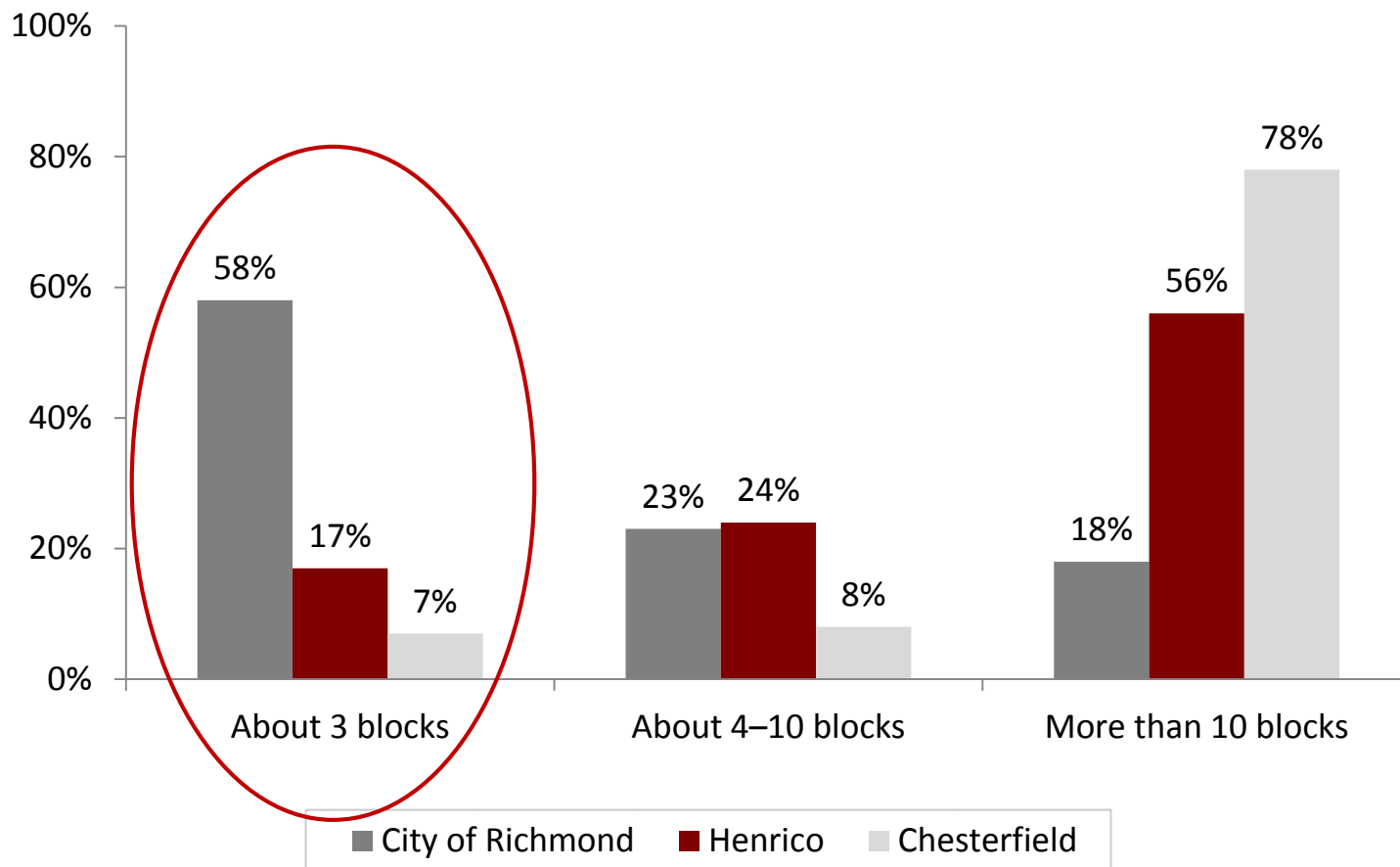


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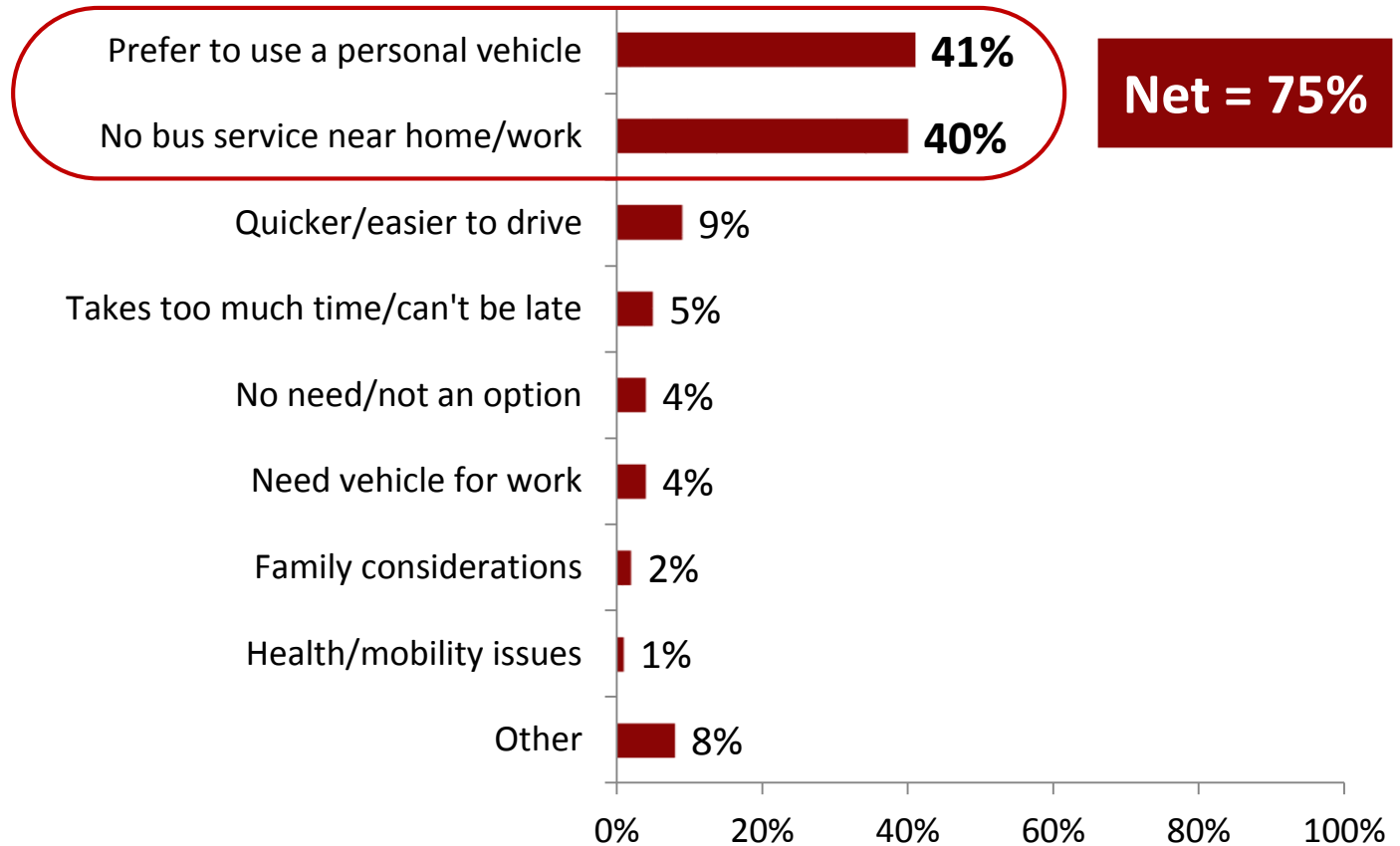
Q18. How close is this GRTC bus stop to your home?



Today, the Biggest Opportunity Is in the City



Three-Quarters of Non-Riders Reported They Don't Ride the Bus Because They Prefer to Use a Personal Vehicle or Bus Service Isn't Available in Areas They Travel



5

The Majority of Residents Support Increasing GRTC's Bus Services

“To what extent would you support each of the following types of expansion or improvement of GRTC bus service?”

Adding Service to the Airport and More Bus Service to Both Chesterfield and Henrico Are the Most Supported Service Improvements or Expansions

	Total	City of Richmond	Henrico	Chesterfield
Add bus service to the airport	80%	83%	80%	77%
Add more bus service to Chesterfield County	71%	74%	63%	77%
Add more bus service to Henrico County	70%	79%	78%	56%
Add more bus service to the city of Richmond	65%	76%	65%	57%
Increase frequency of buses traveling routes in Chesterfield County	63%	68%	57%	67%
Increase frequency of buses traveling routes in Henrico County	62%	72%	65%	52%
Increase frequency of buses traveling the routes already served in city of Richmond	59%	71%	59%	51%

Q28. To what extent would you support each of the following types of expansion or improvement of GRTC bus service?

22%

Almost one-quarter of respondents are interested in participating in an online research panel to help GRTC improve bus service.

RVA Business Leaders Study Findings

RVA Top Business Leaders Study

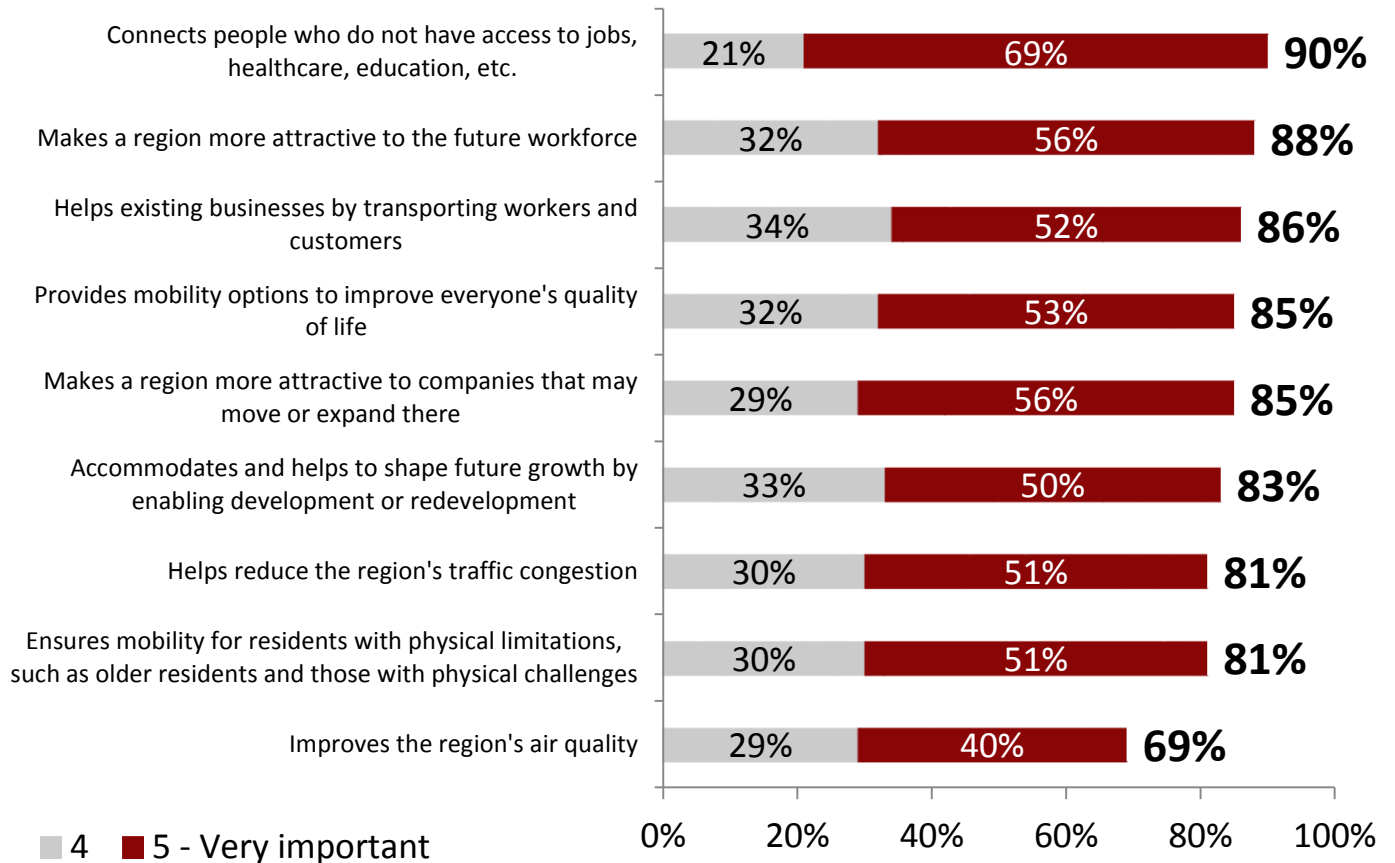
- A 29-question online survey was created by SIR and approved by GRTC.
- Survey invitations and reminders were sent to 1,028 members of the Greater Richmond Chamber of Commerce and 1,481 members of Leadership Metro Richmond (LMR). A link to the survey was also included in the LMR e-newsletter sent to members on July 1.
- The survey was available from June 30 through July 22. A total of 306 respondents completed the survey.

1

**Business Leaders See the Many
Benefits of a Transit System
and Are Not Satisfied with Our
Transit System Today**

Note:
Nonprofits had
higher top two box
scores than either
private or
government
organizations in
every attribute.

Business Leaders Believe That a Transit System Is Important in Many Respects



Q9. How important is it for a transit system to provide each of the following benefits to its region:

Satisfaction with Our Transit System Is Low When Rating All Transit Benefits



Q10. In your opinion, how satisfied are you with our transit system's performance on each of these benefits:

Please note:
Percentages
represent top two
box ratings of “4”
and “5” from Q9
(importance) and
Q10 (satisfaction).

The Local Transit System Has Huge Gaps in Performance from the Business Leader’s Perspective

Benefit	Importance	Performance	Gap
Connects people who do not have access to jobs, healthcare, education, etc.	90%	7%	-83
Makes a region more attractive to the future workforce	88%	7%	-81
Helps existing businesses by transporting workers and customers	86%	6%	-80
Provides mobility options to improve everyone’s quality of life	85%	6%	-79
Makes a region more attractive to companies that may move or expand here	85%	6%	-79
Accommodates and helps to shape future growth by enabling development or redevelopment	83%	6%	-77
Helps the region’s traffic congestion	81%	8%	-73
Ensures mobility for residents with physical limitations, such as older residents and those with physical challenges	81%	11%	-70
Improves the region’s air quality	69%	13%	-56

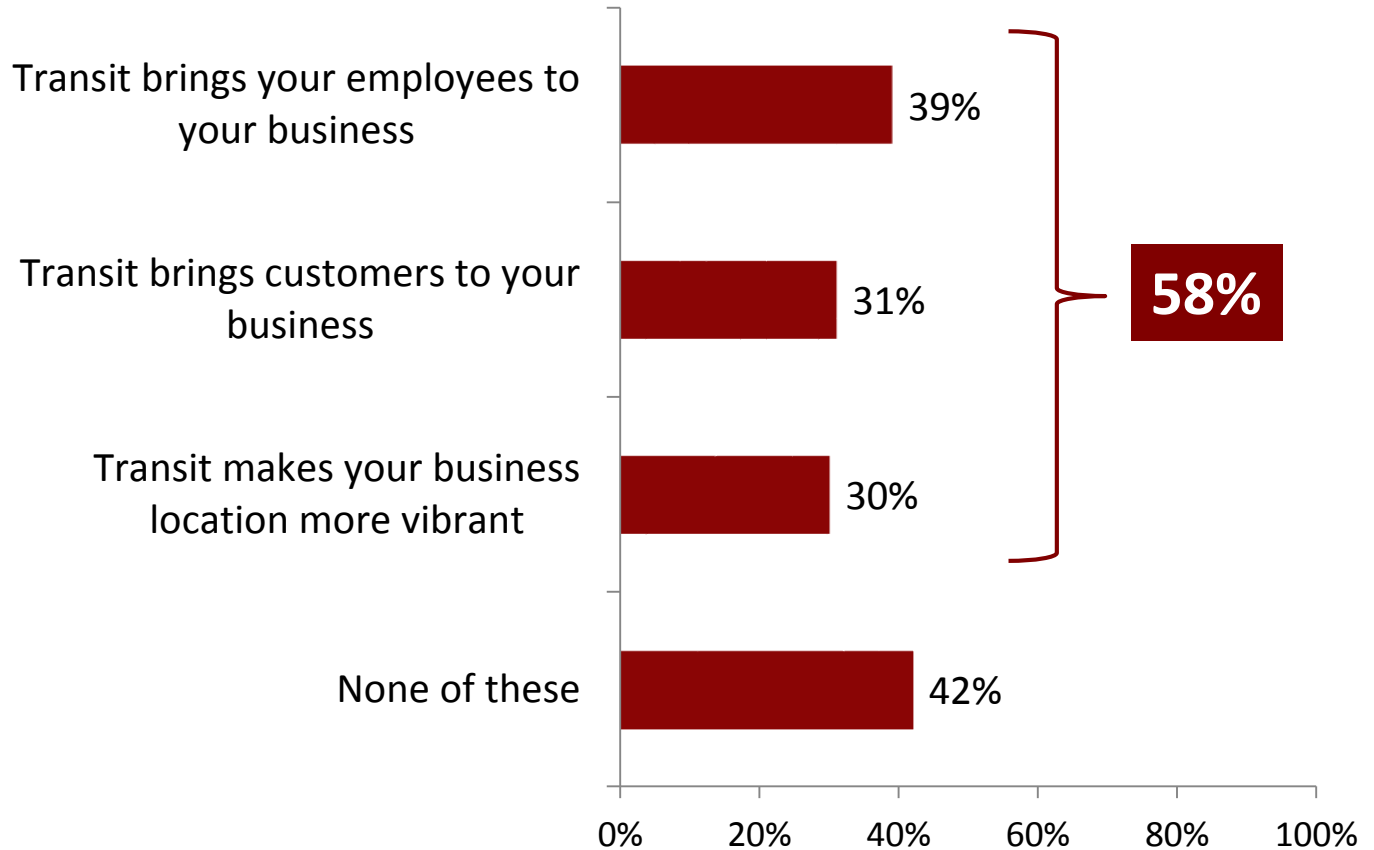
2

**Business Leaders See Transit
Becoming Even More Important
to Their Businesses and the
Richmond Region in the Future**

Nearly Six in Ten Business Leaders Say Transit Plays a Role in Their Organization **Today**

Note:
Respondents were instructed to select all answers that apply. Therefore, percentages do not add to 100%.

Note:
Large organizations (81%) are significantly more likely to say transit plays a role in their business today than small organizations (46%) or medium-sized organizations (51%).

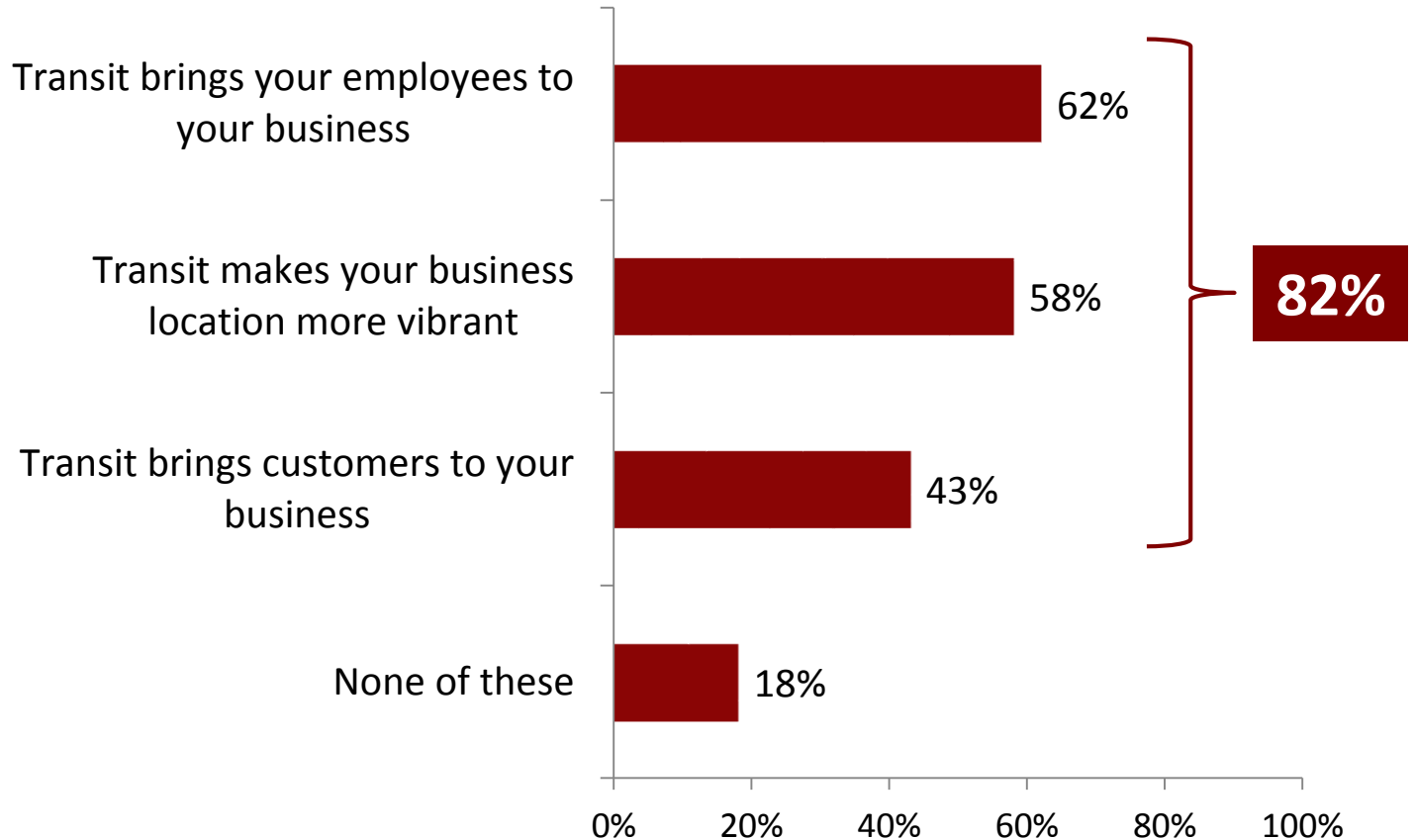


Q16. What role does transit play today for your business?

Business Leaders Would Like Transit to Play a Part in Their Business in the Future

Note:
Respondents were instructed to select all answers that apply. Therefore, percentages do not add to 100%.

Note:
Similarly, large organizations (95%) are significantly more likely to say they would like transit to play a role in their business in the future than small organizations (74%) or medium-sized organizations (84%).



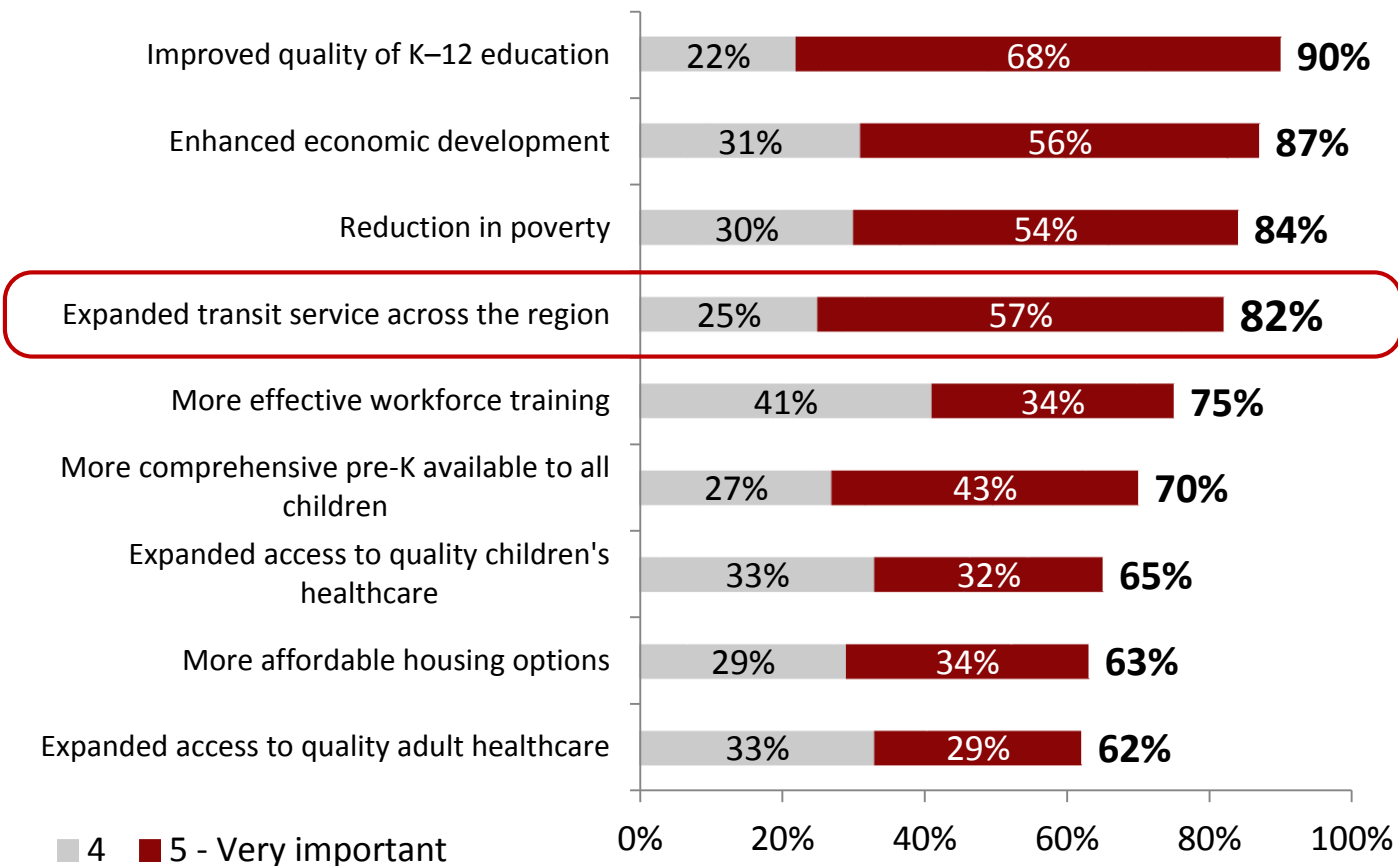
Q17. What role would you like transit to play for your business in the future?

3

Business Leaders Are Very Supportive of Improving the Transit System

Note:
Nonprofits were significantly more likely to rate “expanded transit service across the region” as important compared to private or government organizations.

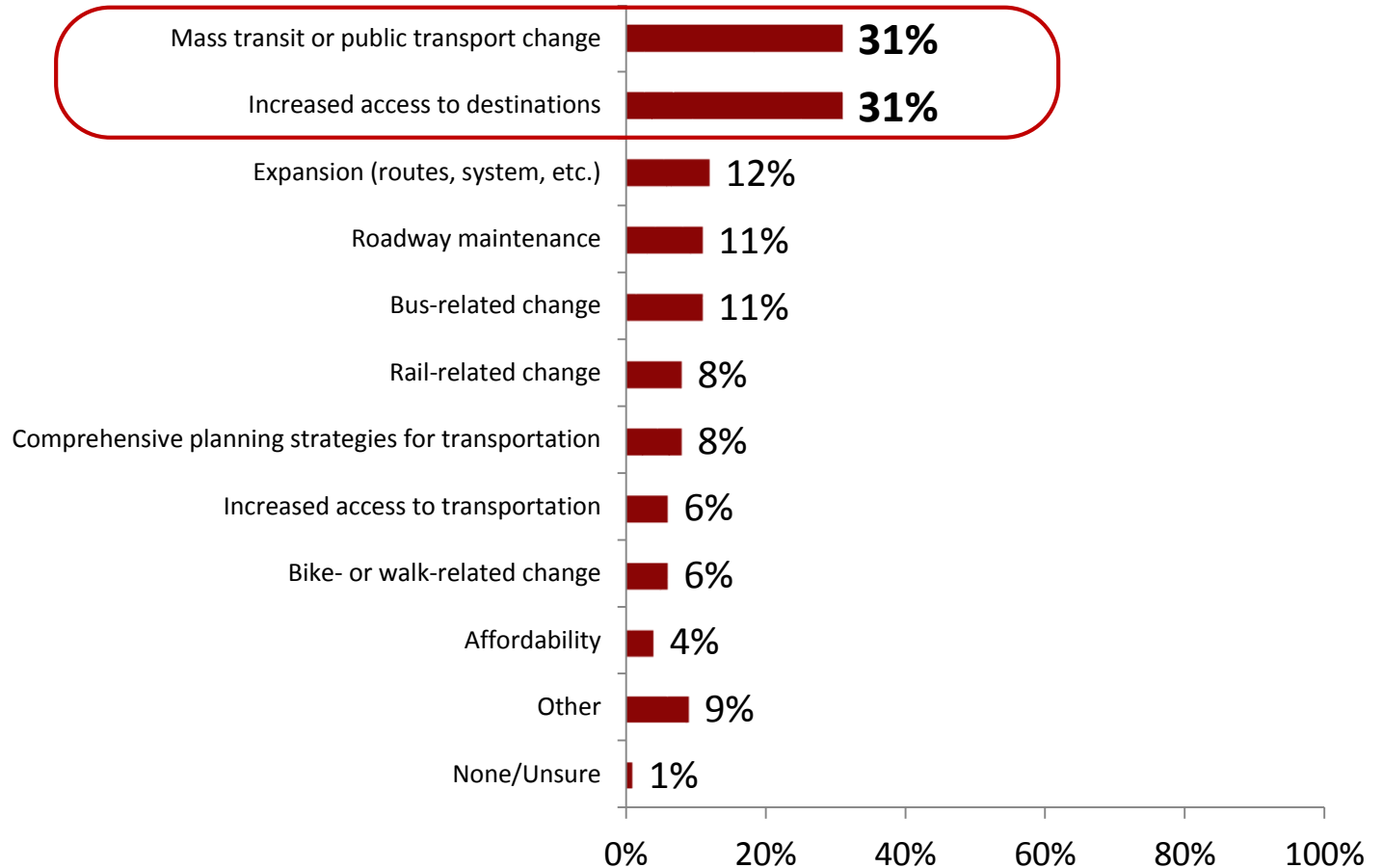
Among Business Leaders, Enhanced Transit Ranks High in Importance for Regional Needs



Q4. How important are each of these regional needs today?

Note:
Respondents could
give multiple
answers, so
percentages add to
more than 100%.

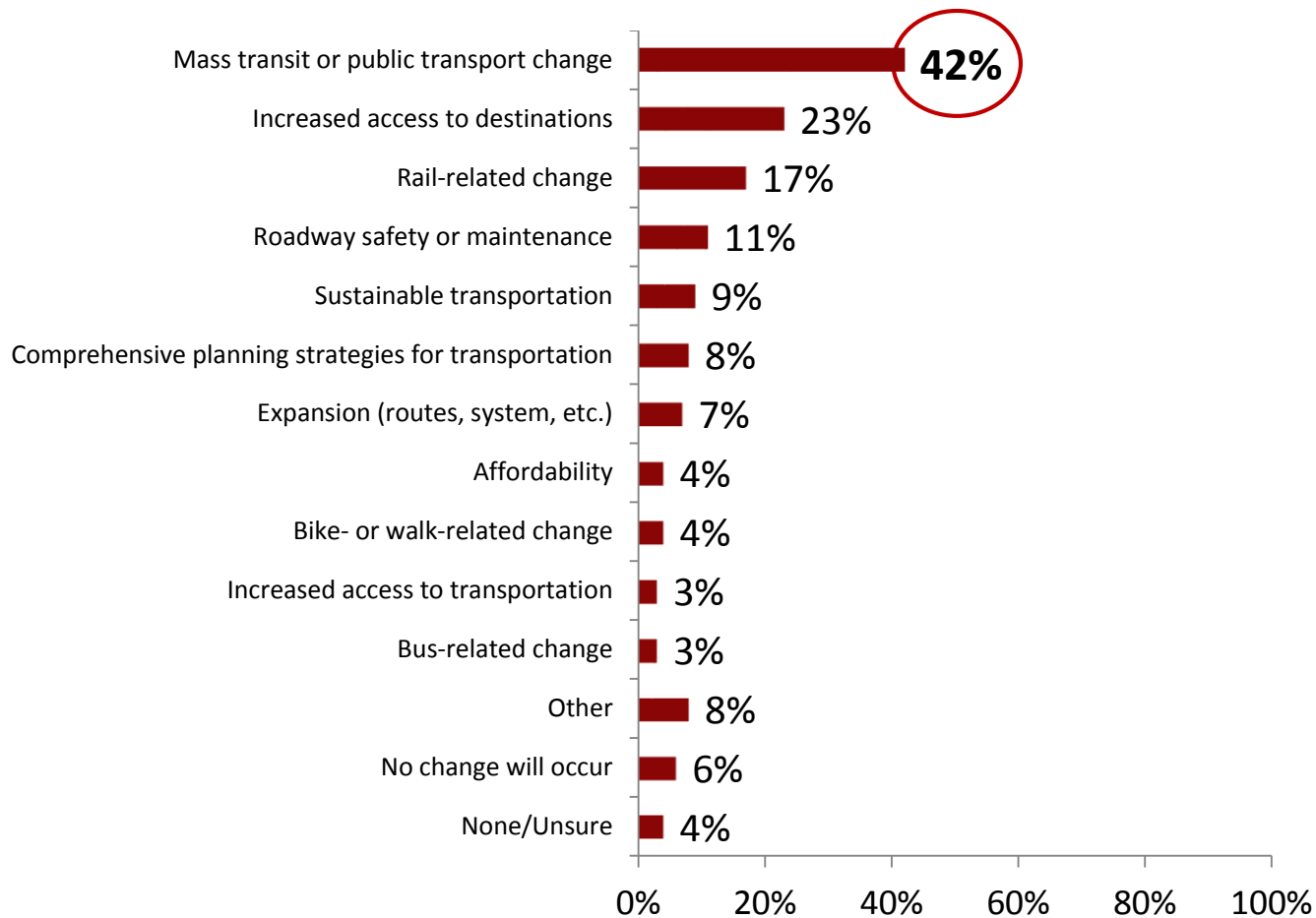
Mass Transit Change and Increased Access to Destinations Are the Greatest Needs in 2015



In 2030, Business Leaders Predict That Mass Transit Will Grow as Our Greatest Need

Note:
Respondents could give multiple answers, so percentages add to more than 100%.

Note:
Nonprofits were significantly more likely to mention “mass transit or public transport change” as a future need compared to private or government organizations.



Q7. What will be our region’s greatest transportation-related need in 2030, fifteen years from now?

Public Transit Service Would Receive the Most Funding from Each Jurisdiction

	Total
Public transit service	\$31
Passenger train service	\$17
Sidewalks and bicycle paths	\$15
Local secondary roads such as Broad Street and Hull Street	\$12
Intercity highways such as I-95 and I-64	\$11
Local highways such as Powhite Parkway	\$8
Airport facility	\$7
TOTAL:	\$100

*We compared current
funding support to two previous studies
among RVA business leaders:*

*2009 RideFinders
Business Leader Study
(number of completes = 200)*

*2005 Chamber/RideFinders
Employer Study
(number of completes = 260)*

Note:
 Transit, passenger
 train, and
 sidewalks/bike
 paths gained
 additional support
 since 2009, while
 roadway support
 dropped.

Support for **Public Transit Service** Almost Doubled from the 2009 Level

	2005	2009	2015
Public transit service	\$13	\$17	\$31
Passenger train service	\$15	\$13	\$17
Sidewalks and bicycle paths	\$8	\$10	\$15
Local secondary roads such as Broad Street and Hull Street	\$18	\$17	\$12
Intercity highways such as I-95 and I-64	\$18	\$19	\$11
Local highways such as Powhite Parkway	\$17	\$15	\$8
Airport facility	\$12	\$7	\$7
TOTAL:	\$100	\$100	\$100

Q13. How would you distribute the \$100 among these services and needs?

Summary

3 Major Planning Insights

3 Key Takeaways

1. Current riders appreciate and are satisfied with GRTC's service.
2. There are a few areas where GRTC can make immediate improvements.
3. Residents and business leaders value transit in this region and want to see more of it.

There is an opportunity to begin a more concerted effort to advance transit. GRTC can help lead the way.