



Emery Go-Round Survey Research Results

AUGUST 2026

PICCADILLY





Agenda

01 Objective and Methodology

02 Survey Results

03 Key Insights & Strategic Priorities

04 Summary

05 Q&A

A young woman with a backpack holding books on a bus. The image is overlaid with a dark blue filter. The woman is smiling and looking towards the camera. She is holding a stack of books in her left arm and has a backpack on her back. Other passengers are visible in the background, including an older man and a young girl.

01

Objective and Methodology

Objective

Emery Go-Round (EGR) seeks to better understand stakeholder perceptions, experiences, and expectations regarding the Emery Go-Round shuttle service.

Goals of this research are to determine:

- How riders and non-riders perceive the shuttle service
- How people learn about Emery Go-Round
- The aspects of the service that users value most
- Unmet needs, service gaps and opportunities for improvement

Ultimately, these insights should help Emery Go-Round make informed decisions to enhance service value, increase utilization and support the continued recovery of ridership toward pre-pandemic levels.



Methodology

Three surveys (with corresponding margins of error) were conducted during June 9-30, 2026, in English and Spanish with adults (18+) who ride EGR, work in, or live in the City of Emeryville.

- Emery Go-Round Shuttle Riders (n = 352; ME +/-5.2%)
- Employees of Businesses within Emeryville (n = 336; ME +/-5.4%)
- Residents of Emeryville (n = 204; ME +/-6.9%)

For Shuttle Rider Surveys and Employee Surveys, field staff engaged respondents and offered a \$20 gift card. Once quotas of 250 surveys were reached, additional surveys were collected without the incentive. A total of 352 Rider Surveys and 336 Employee Surveys were completed.

The Resident Survey was conducted through a research call center using lists of City residents. Residents were invited to participate through email, text message and telephone outreach. A total of 204 residents completed the survey, and the sample was weighted to reflect the demographics of the City's adult population. Approximately 4% of all interviews were conducted in Spanish.



A man with glasses and a beard is sitting in a hospital bed, looking thoughtful. He is wearing a light blue button-down shirt over a red and white striped t-shirt. His hands are clasped in his lap. The background shows a hospital room with a window and some medical equipment. The entire image has a blue tint.

02

Survey Results



SURVEY RESULTS

Demographic Highlights

Sample Sizes (n)

Riders



Employees



Residents



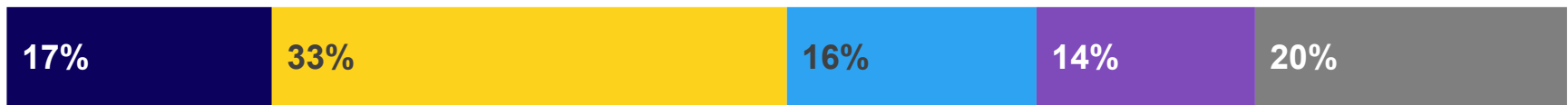
Total
892

Race/Ethnicity | Demographic Highlights

Riders | 352



Employees | 336



Residents | 204



One of the most diverse transit audiences in the East Bay. Residents differ from other groups

- White
- Black
- Latino
- Asian
- Other/Refused

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Age | Demographic Highlights

Riders | 352



Employees | 336



Residents | 204



Two in three riders are under 40; Residents skew notably older

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

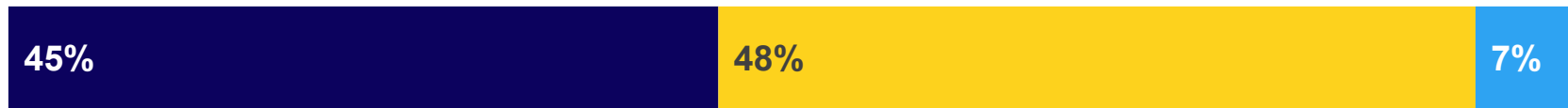
- 18-29
- 30-39
- 40-54
- 55+

Gender | Demographic Highlights

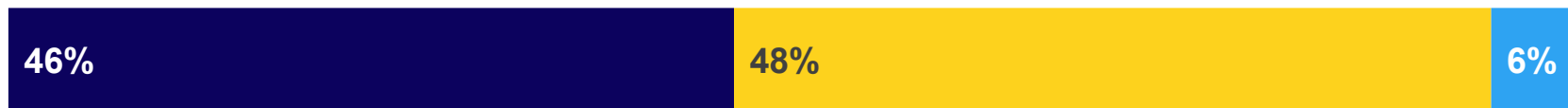
Riders | 352



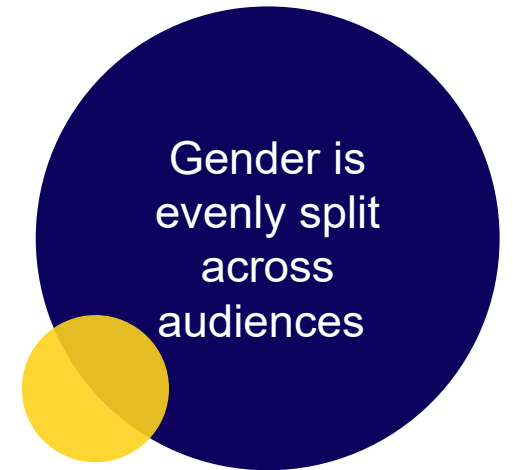
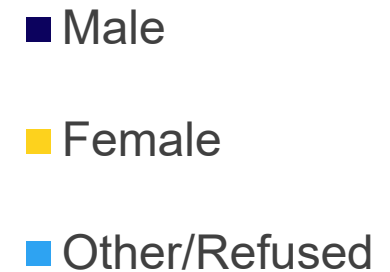
Employees | 336



Residents | 204



0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



Ridership By Survey Type | Demographic Highlights

	TOTAL	RIDERS	EMPLOYEES	RESIDENTS
Sample Size	880	352	325	203
Daily	26%	32%	30%	9%
A few times a week	30%	40%	26%	19%
A few times a month	24%	16%	22%	40%
Once a month	13%	4%	16%	24%
Less often	8%	9%	6%	8%

Residents have the greatest potential for expanding their ridership

City of Residence | Demographic Highlights

CITY OF RESIDENCE	TOTAL	RIDERS	EMPLOYEES	RESIDENTS
Sample Size	892	352	336	204
Emeryville	42%	32%	18%	100%
Oakland	25%	26%	38%	
San Francisco	6%	9%	7%	
Berkeley	4%	7%	4%	
Richmond	3%	4%	3%	
San Leandro	2%	1%	4%	
Albany	1%	1%	1%	
Alameda	1%	1%	1%	
El Cerrito	1%	1%	2%	
Fremont	1%	1%	1%	
San Pablo	1%	0%	2%	
Other California	13%	16%	18%	
Other not in California	1%	2%	0%	

Nearly 4 in 10
Emeryville
employees
interviewed
commute in from
Oakland



SURVEY RESULTS

Rider Survey Only Questions

Time Riding | Rider Survey

Less than 1 month

9%

1 to 3 months

13%

4 to 6 months

13%

7 to 12 months

13%

1 to 2 years

14%

More than 2 years

38%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%

More than half of riders have used EGR over a year — 38% for two-plus years

Sample:
352

Transport to Shuttle | Rider Survey

Walk

61%

BART

57%

Bus/AC Transit

22%

Bike/Scooter

8%

Rideshare

5%

Dropped off

4%

Amtrak

2%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Riders arrive on
foot or from
BART: 61% walk
57% transfer

Sample:
352

Work/Student Status | Rider Survey

Working full-time

66%

Working part-time

21%

Not currently employed

13%

Student

14%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

EGR is, first, a
work trip as
nearly 9 in 10
riders are
employed

Sample:
352

A man with glasses and a beard is sitting in a hospital bed, looking thoughtful. He is wearing a light blue button-down shirt over a red and white striped t-shirt. His hands are resting on his lap. The background shows a hospital room with medical equipment and a window. The entire image has a purple overlay.

SURVEY RESULTS

Asked In All Versions Of Survey

Ridership Frequency | All Surveys

Daily



A few times a week



A few times a month



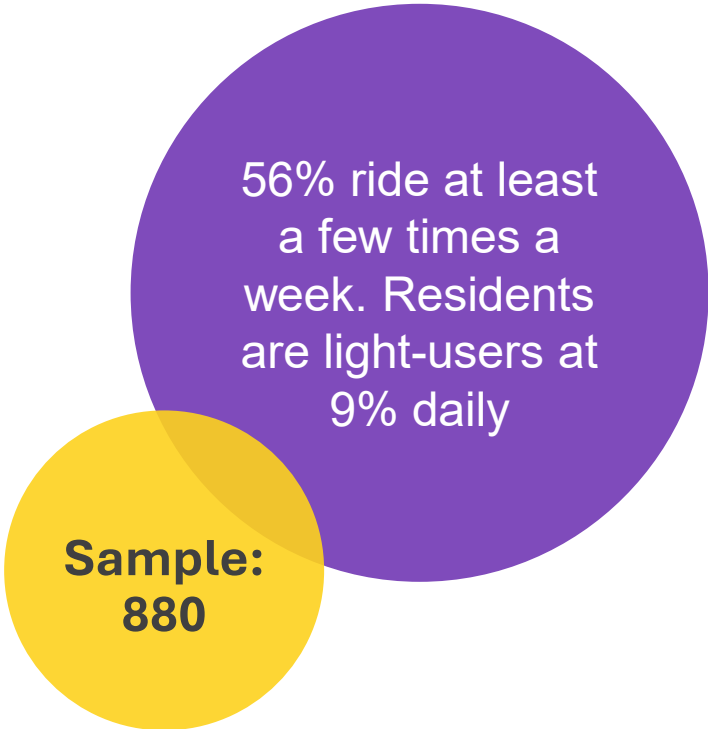
Once a month



Less often



0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%



Time of Day Ridden | All Surveys

Weekday morning, before 10am

58%

Weekday midday, 10am to 3pm

44%

Weekday late afternoon, 3pm to 7pm

63%

Weeknight, after 7pm

27%

Weekends

38%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Peaks are firmly commuter-shaped, yet 38% still ride weekends and 27% after 7pm

**Sample:
743**

Reasons For Use | All Surveys

It's free

78%

Convenience

65%

Connects to BART

65%

Saves money

63%

Avoids driving/parking

44%

Saves time

42%

Environmental reasons

28%

Don't have use of a vehicle

24%

Connects to AC Transit

23%

Connects to Amtrak

13%

Employer encourages it

7%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Free fare leads,
but convenience
and BART
access are close
behind

Sample:
743

Usage of Shuttle | All Surveys

Commute to work

68%

Errands or tasks

47%

Shopping

43%

Recreation

31%

Commute to school

12%

Other

9%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Two-thirds
commute and
half also run
errands

Sample:
743

Desired Enhancements | All Surveys

More frequent service



Connect to more places in Emeryville



Expanded weekend hours



Expanded evening hours



Better connections to BART



More reliable service



Expanded early morning hours



Clean-air vehicles



Better Wi-Fi/online connections



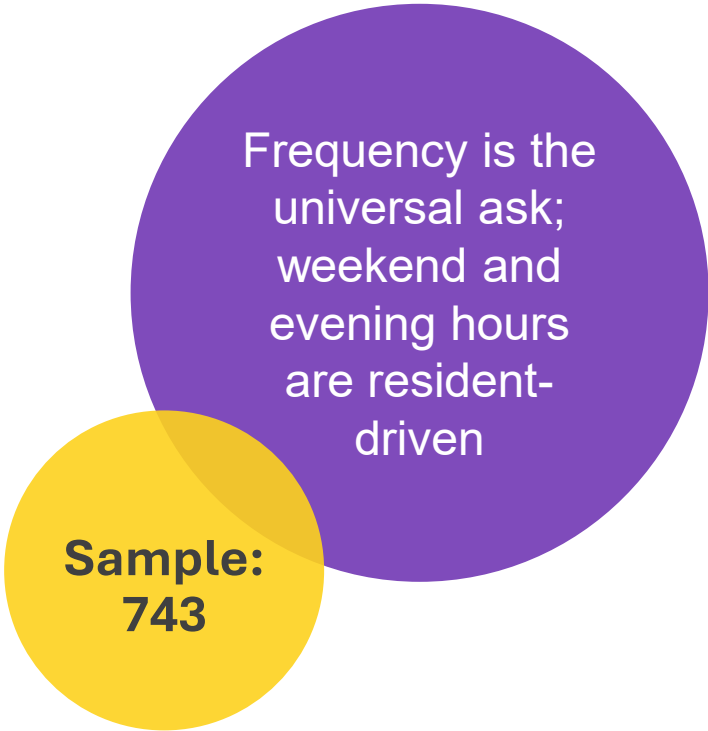
Better connections to AC Transit



Better connections to Amtrak



0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



Rating of Elements | All Surveys

Sample: 743 | 5 Point Scale



Rating of Elements | All Surveys

Sample: 743 | 5 Point Scale

	TOP 2-BOX	MEAN RATING
 Safety	89%	4.47
 Capacity	88%	4.48
 Friendliness of Staff	88%	4.51
 Stop Locations	84%	4.32
 Frequency	83%	4.30
 Comfort	83%	4.33

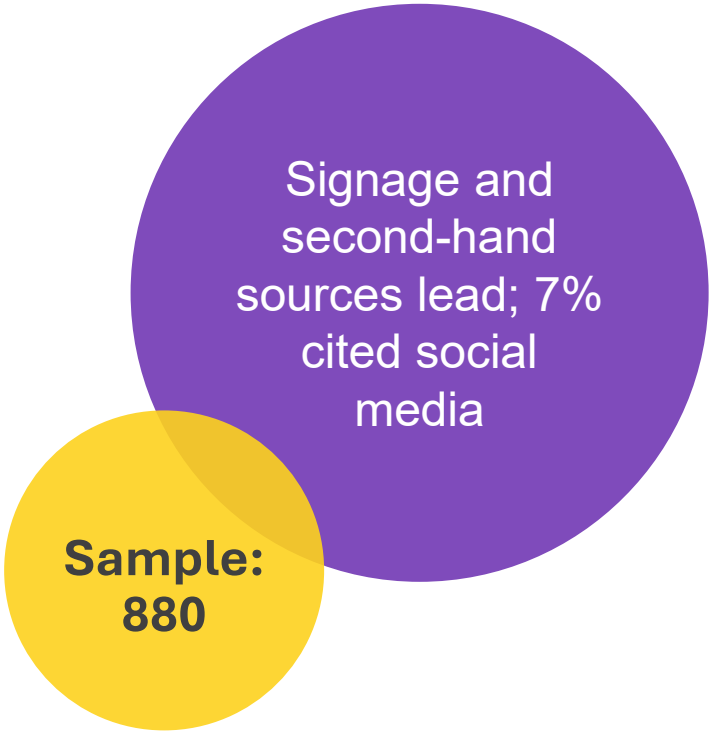
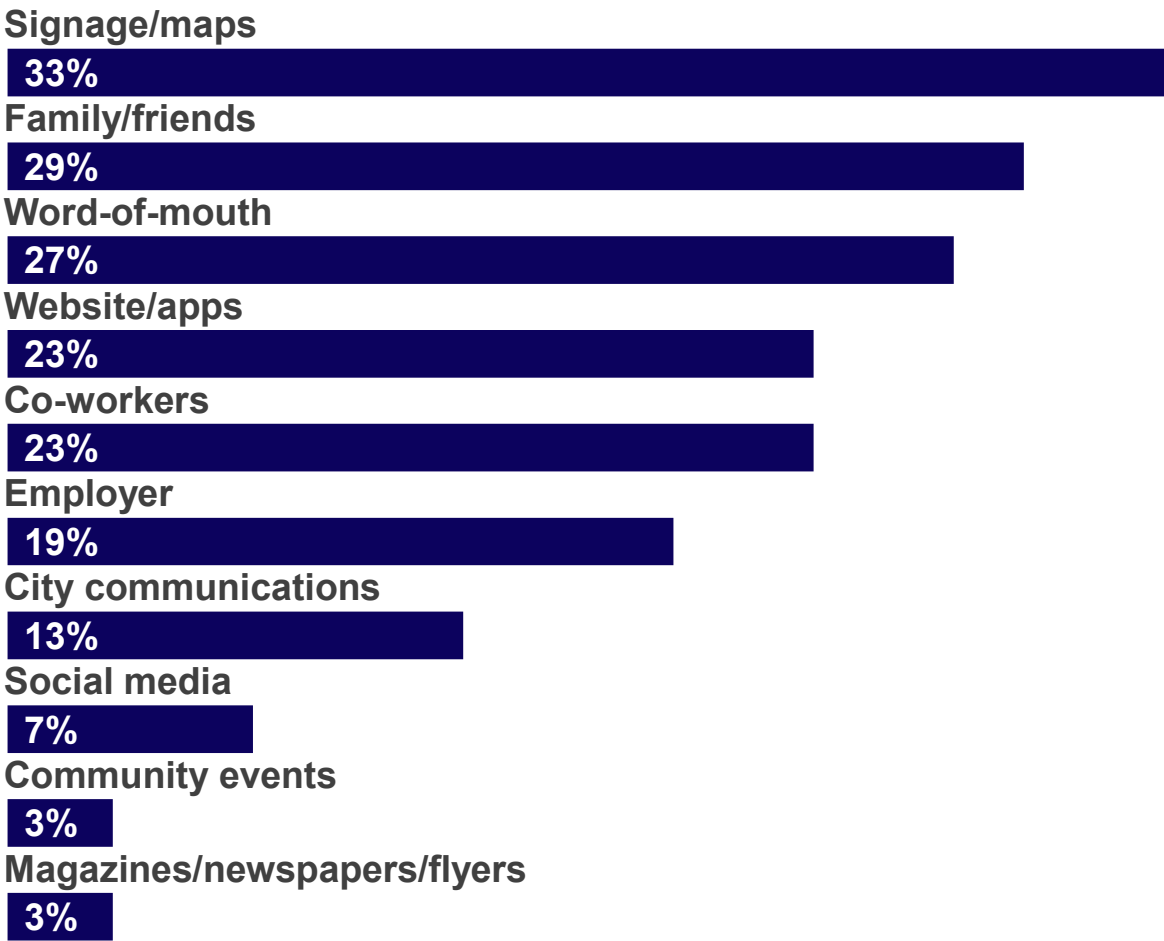
	TOP 2-BOX	MEAN RATING
 Cleanliness	81%	4.30
 Routes	80%	4.25
 Reliability	79%	4.19
 Hours of Operation	74%	4.12
 Real-time Info	73%	4.09

Satisfaction with Emery Go-Round | All Surveys

5-Point Scale

SERVICE ATTRIBUTE	TOTAL	RIDERS	EMPLOYEES	RESIDENTS	RANGE
Sample Size	743	352	253	138	--
Friendliness of drivers/staff	4.51	4.55	4.53	4.38	0.17
Capacity/spaciousness	4.48	4.46	4.44	4.63	0.19
Safety	4.47	4.43	4.50	4.50	0.07
Comfort	4.33	4.31	4.40	4.27	0.13
Stop locations	4.32	4.32	4.38	4.23	0.15
Frequency of service	4.30	4.35	4.38	4.06	0.32
Cleanliness	4.30	4.25	4.39	4.23	0.16
Route coverage	4.25	4.31	4.36	3.91	0.45
Reliability/on-time performance	4.19	4.23	4.26	3.94	0.32
Hours of operation	4.12	4.16	4.26	3.76	0.50
Real-time information	4.09	4.10	4.23	3.81	0.42

Learned About EGR From | All Surveys



0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%



SURVEY RESULTS

Asked In Resident And Employee Survey

Familiarity With EGR | Resident and Employee Survey

Very familiar

52%

Somewhat familiar

31%

Slightly familiar

8%

Aware of but don't know details

7%

Not aware at all

3%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Awareness is
not a barrier

Sample:
539

Reasons For Not Using | Resident and Employee Survey

Driving is faster or more convenient



Doesn't go near my home



Prefer other transit



Did not know it was free



Don't know how to use it



Doesn't go near my worksite



Schedule doesn't align with work hours



Shuttle is too infrequent



Work hybrid/remote



Safety concerns



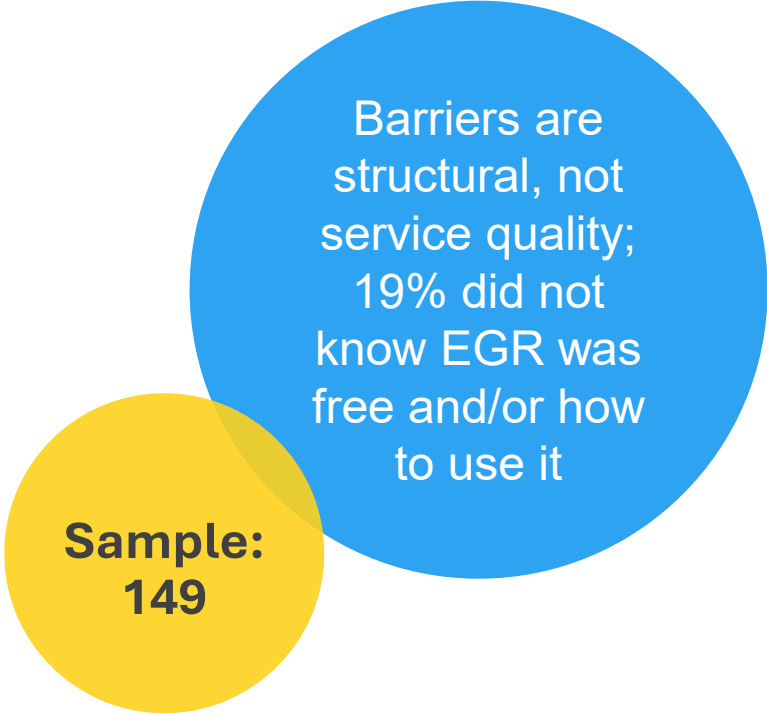
Shuttle is unreliable



Comfort concerns



0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%



Encouraging Items | Resident and Employee Survey

Better connections to BART



More frequent service



Connect to more places in Emeryville



Expanded weekend hours



Better connections to AC Transit



Expanded evening hours



More reliable service



Expanded early morning hours



Better connections to Amtrak



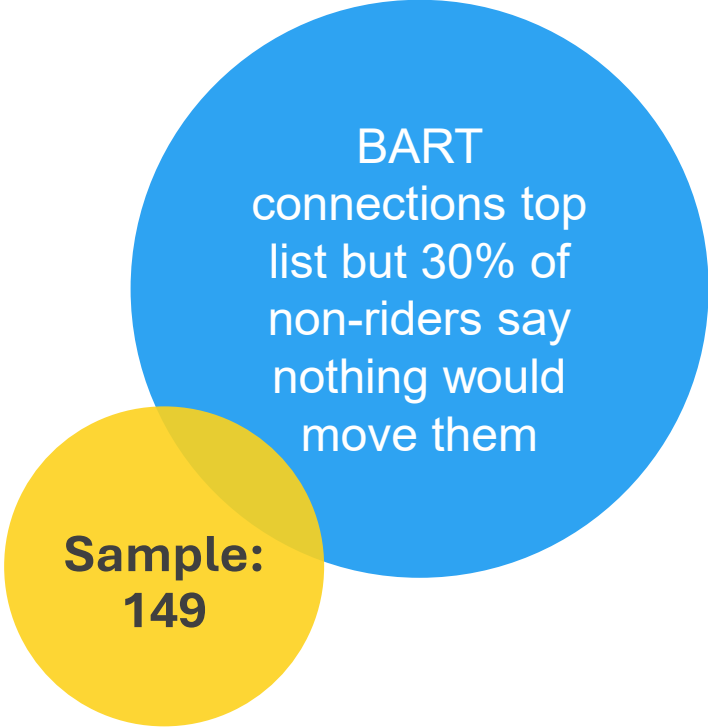
Clean-air vehicles (e.g., electric, hybrid)



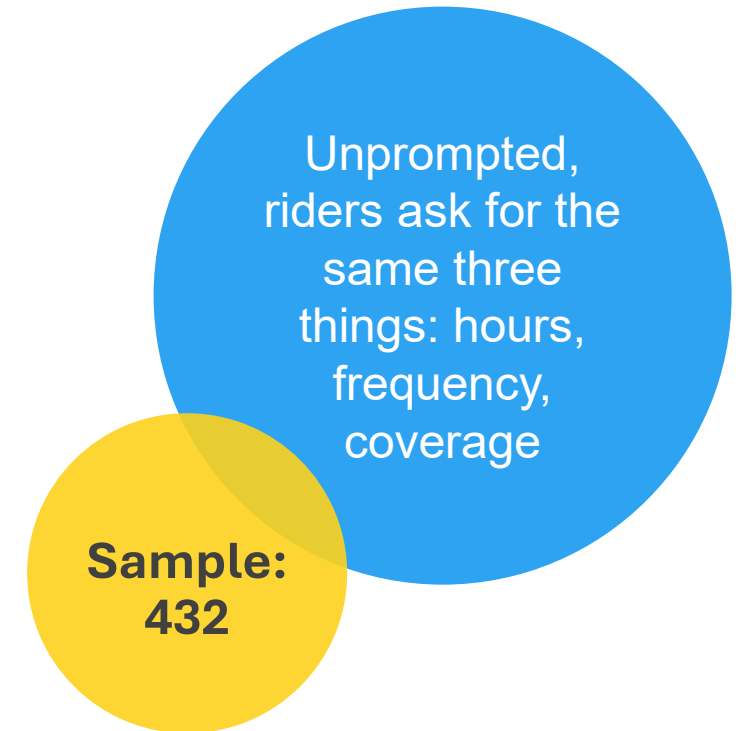
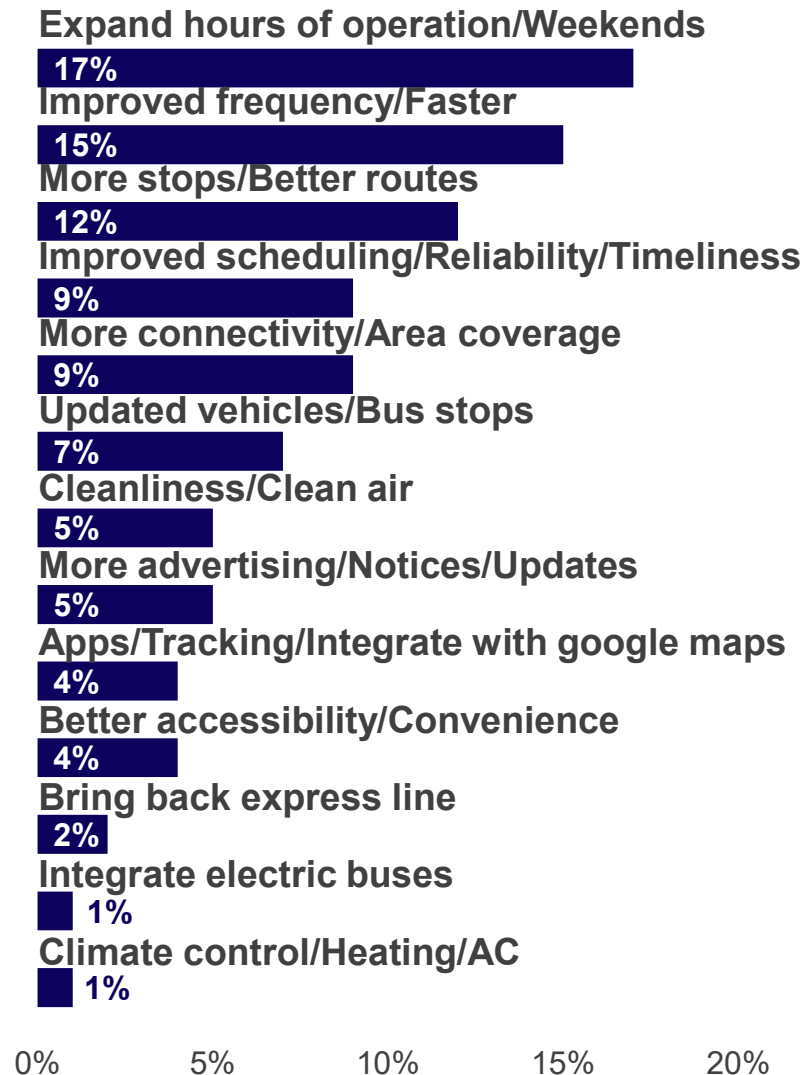
Better Wi-Fi/online connections



0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%



One Change To Improve Services – Open-End



Mode of Transportation to Work | Resident and Employee Survey

BART



Emery Go-Round



Driving alone



AC Transit Bus



Walking



Bike/scooter



Rideshare



Work remotely



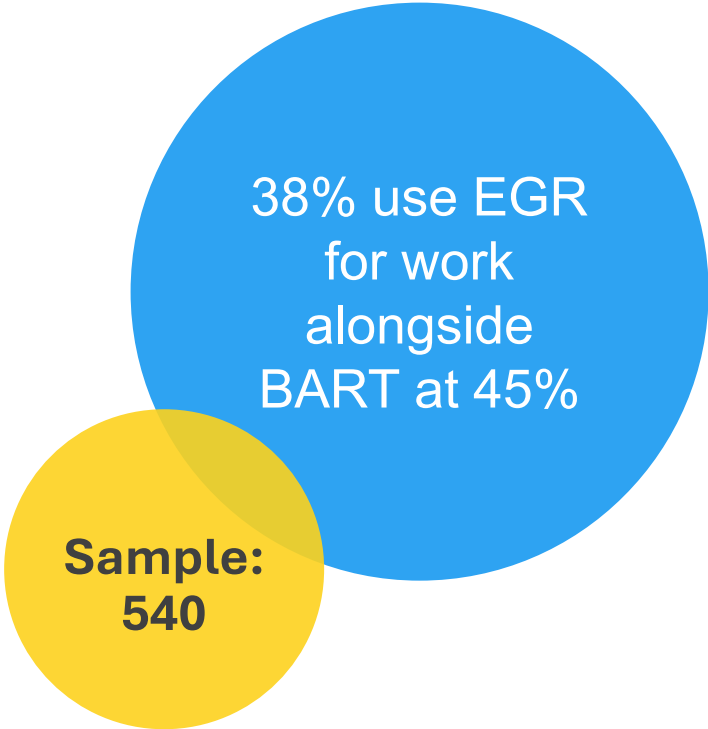
Carpool/vanpool



Amtrak



0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%



BART Stations Used | Resident and Employee Survey

MacArthur

88%

West Oakland

43%

19th Street Oakland

17%

Ashby

13%

Other

14%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

MacArthur is
currently the
franchise

Sample:
245

A man with glasses and a beard is sitting in a hospital bed, looking thoughtful. He is wearing a light blue button-down shirt over a red and white striped t-shirt. His hands are resting on his lap. The background shows the metal frame of the bed and some medical equipment. The entire image has a purple overlay.

SURVEY RESULTS

Asked Only In Resident Survey

Greatest Benefit | Resident Survey

Free service

47%

Convenience

23%

Avoids driving/parking hassle

19%

Reduces traffic

2%

Environmental impact

1%

Other

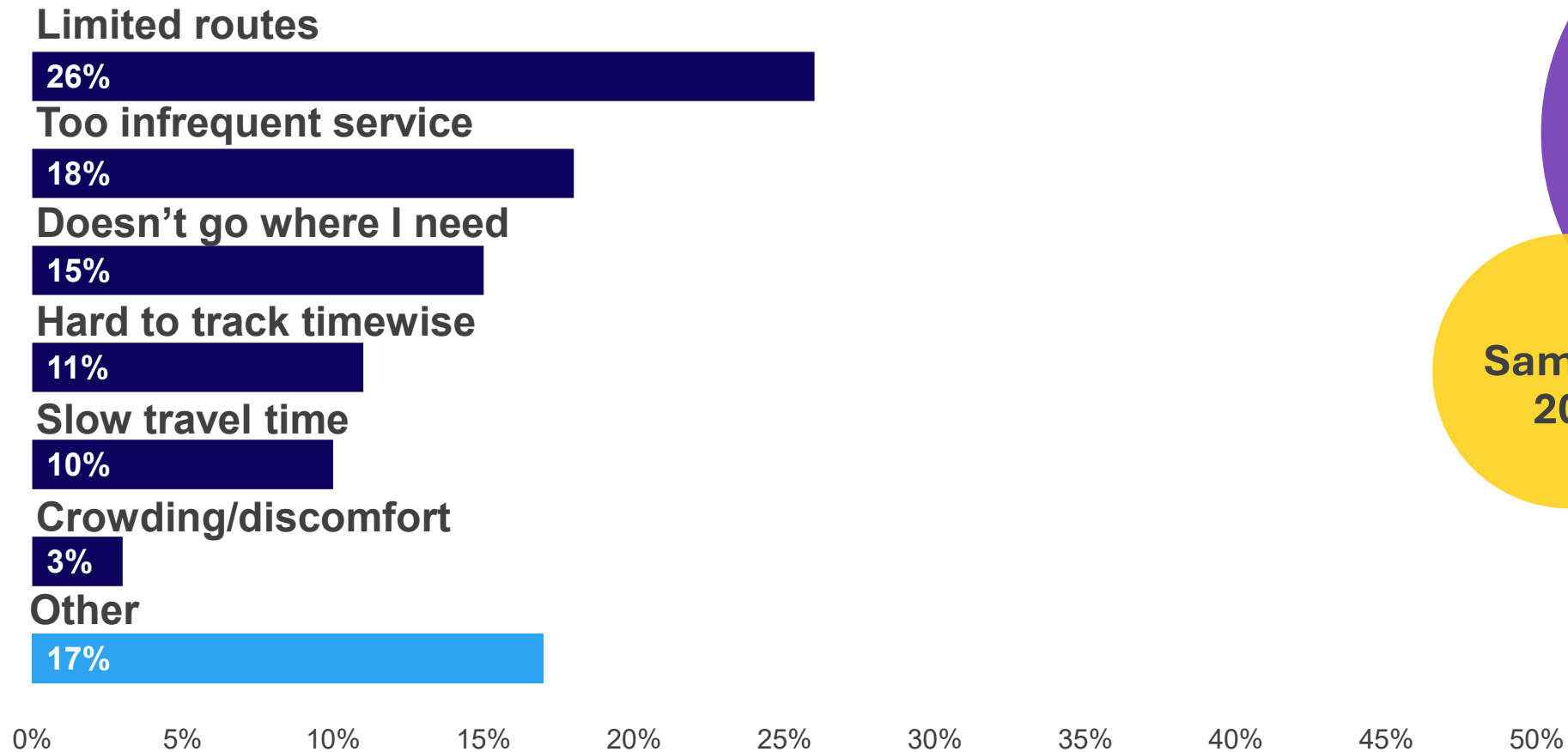
8%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Unprompted,
residents name
the free fare first

Sample:
203

Biggest Drawback | Resident Survey



Why Choose To Use EGR

Resident Survey

Connection to BART

37%

Convenience

32%

Free/It's cheaper

29%

Goes where I need to go

17%

Use it but has complaints

17%

Don't have to drive/own a car

14%

Close by/Live near a station or stop

9%

General positive

7%

Lack of parking/Don't have to park

5%

Mobility issues

2%

Nice drivers/Staff

2%

Able to bring bike onboard

1%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%

BART access,
convenience,
cost - the same
three reasons, in
residents' own
words

Sample:
135

Why Choose Not To Use EGR | Resident Survey

Prefer driving



Have other means of transportation



Slow/Takes too long



Lack of Coverage/Stops/Routes



Inconvenient/Not flexible



Use bike/e-bike



Lack awareness/Difficult to understand



Frequency/Doesn't fit my schedule



Unsafe/Homeless onboard



Dirty/Cleanliness issues



General negative





03

Key Insights & Strategic Priorities

Key Insights – Who & Why

Established Transportation Resource

EGR is an integral mobility option, with most riders using the service for more than a year and 38% for more than two years. 80% use the shuttle a few times a month or more.

Frequent, Work-Oriented Use

Ridership is primarily commuter-based, but EGR also supports lifestyle use - shopping, recreation and daily activities. Nearly 4 in 10 riders use weekend service, and 27% ride in the evening.

Diverse, Younger Rider Base

EGR serves a broad community, with younger workers and transit users forming a core segment. Service planning should continue to reflect their needs and preferences.

Critical BART Connector

EGR plays a key first-mile/last-mile role, with 57% of riders connecting to BART. Maintaining and expanding BART access should remain a priority.



Key Insights – Motivations & Limitations

Cost and Convenience Drive Ridership

Free fares, convenience and BART connections are the strongest motivators. Riders want more frequent service, broader coverage and expanded evening and weekend hours.

High Customer Satisfaction

Riders rate the service highly, especially driver/staff friendliness, capacity, safety and comfort. Improvement opportunities center on real-time information and expanded service hours.

Convenience and Coverage Limit Non-Rider Adoption

Non-riders cite limited routes, frequency and BART connections as key barriers. One in five lack awareness that EGR is free or are unsure how to use it.

Awareness Comes from Visibility and Word-of-Mouth

Signage, maps, websites, apps and personal recommendations are the strongest awareness drivers.



SWOT Analysis

STRENGTHS

- Free fare is a powerful driver of ridership
- Satisfaction is uniformly high with EGR services
- EGR serves a proven first-mile/last-mile role
- Strong rider retention
- Habitual, work-anchored usage
- High awareness

WEAKNESSES

- Hours of operation and real-time information are the lowest-rated attributes
- Coverage gaps are the top structural barrier
- Residents (the lightest users) are the most critical of hours of operation
- Thinner off-peak service
- Basic knowledge gaps persist

OPPORTUNITIES

- Service-level demand is explicit
- Residents are a potential growth market, desiring expanded weekend and evening hours
- BART connection upgrades may convert non-riders
- The employer channel already works
- Signage/maps is a strong awareness driver
- Ridership growth is a realistic prospect
- Social and digital marketing

THREATS

- Ridership remains much lower than pre-pandemic levels
- Hybrid and remote work erode the commute base
- Driving is the default alternative
- Nearly 1 of 3 non-users say nothing would encourage them
- Competing modes are well used (AC Transit, bike/scooter, rideshare)
- Maintaining fleet condition is critical



Riders n=352, Employees n=336, Residents n=204 (weighted). Satisfaction means on a 1–5 scale, users n=743.

Strategic Priorities

Protect the Core Strengths

Preserve the attributes riders value most: free service, convenience, BART connectivity, safety and friendly drivers/staff.

Increase Awareness and Ease of Use

Use employer partnerships, improved signage, wayfinding and trip-planning tools to help potential riders understand that EGR is free, where it goes and how to use it. Continue to grow digital communication channels.

Expand Service Where Demand Is Highest

Prioritize broader route coverage, more frequent shuttles and expanded evening and weekend hours.

Convert Non-Riders and Occasional Riders

Address the primary barriers to ridership to encourage more regular use: limited coverage, frequency, hours and lack of service awareness. While EGR is primarily a commuter service, consider that nearly half use it to run errands, 43% for shopping and 31% for recreation. Residents are the biggest growth market opportunity.

Strengthen Regional Transit Connections

Maintain and improve EGR's role as a first-mile/last-mile connector, particularly to MacArthur BART. A large percentage of employees commute from Oakland; consider ways to form stronger bonds with this group.



The background image shows the interior of a bus with several passengers. A man with a beard and a backpack is in the foreground, looking out the window. A woman is standing next to him, also looking out. Other passengers are visible in the background. The entire image is covered with a semi-transparent blue overlay.

04

Summary

Summary

Who Rides

A young, working, transit-connected base — nearly 9 in 10 riders are employed, two in three are under 40, and most arrive on foot or off BART. Use is habitual: they ride at least a few times a week and have ridden more than two years. Two-thirds commute, but nearly half also run errands and shop.

Why They Ride

It's free, it connects to BART and it's convenient. Satisfaction is uniformly high, led by driver/staff friendliness, capacity and safety.

Why Employees and Residents Don't Ride

It's not primarily because of awareness — a large percentage of residents and employees are familiar with the service. The main barriers are structural: driving is faster, EGR doesn't go near their home, they prefer other transit. Service quality is a non-issue.

What Would Encourage Ridership

Better BART connections, more frequent service, more Emeryville destinations and expanded weekend and evening hours. More education around free service, routes and ease of use. About 3 in 10 non-riders say nothing would move them.



Summary

Emery Go-Round is a highly valued transportation service that supports commuting, shopping, recreation and regional transit access. Riders report exceptionally high satisfaction, particularly with safety, driver/staff friendliness and overall service quality.

The strongest path to growth is to build on these core strengths to convert occasional and non-riders by:

- **Expanding** route coverage and shuttle frequency
- **Extending** evening and weekend hours
- **Strengthening** BART connections
- **Communicating** clearly around free service, routes and ease of use
- **Growing** employer outreach and wayfinding signage

Together, these position EGR to grow ridership and remain essential, expanding its role beyond the commute, supporting everyday community life.



A background image showing two men, one younger and one older, both wearing glasses and smiling while looking at a smartphone held by the younger man. The image is overlaid with a semi-transparent blue filter. The text '05' is positioned to the left of the men, and 'Q&A' is positioned below it, separated by a horizontal line.

05

Q&A



Thank You!

PICCADILLY

