Penn Station Commuter Study

Report of Research Findings

November 15, 2019

Objectives & Methodology

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Objectives

The objectives of this research are to inform Rebuild Penn Station's communications strategy and arm the organization with data that can be used to support its strategic goals.

Research was designed to:

- Explore commuters' usage patterns of Penn Station

- Understand the relative importance of various criteria that commuters want in a transportation hub such as Penn Station

- Assess opinions and perceptions of the current Penn Station

- Measure awareness of the history of Penn Station and of plans to renovate the station

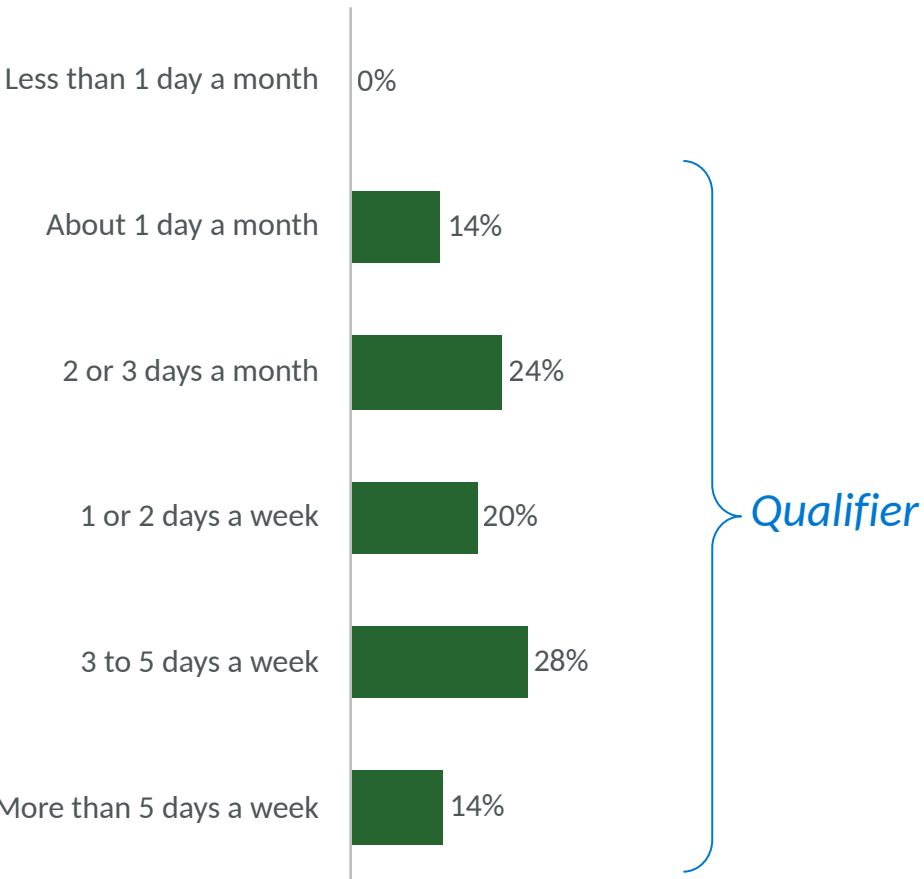- Gauge reactions to various messages regarding renovating Penn Station

Methodology

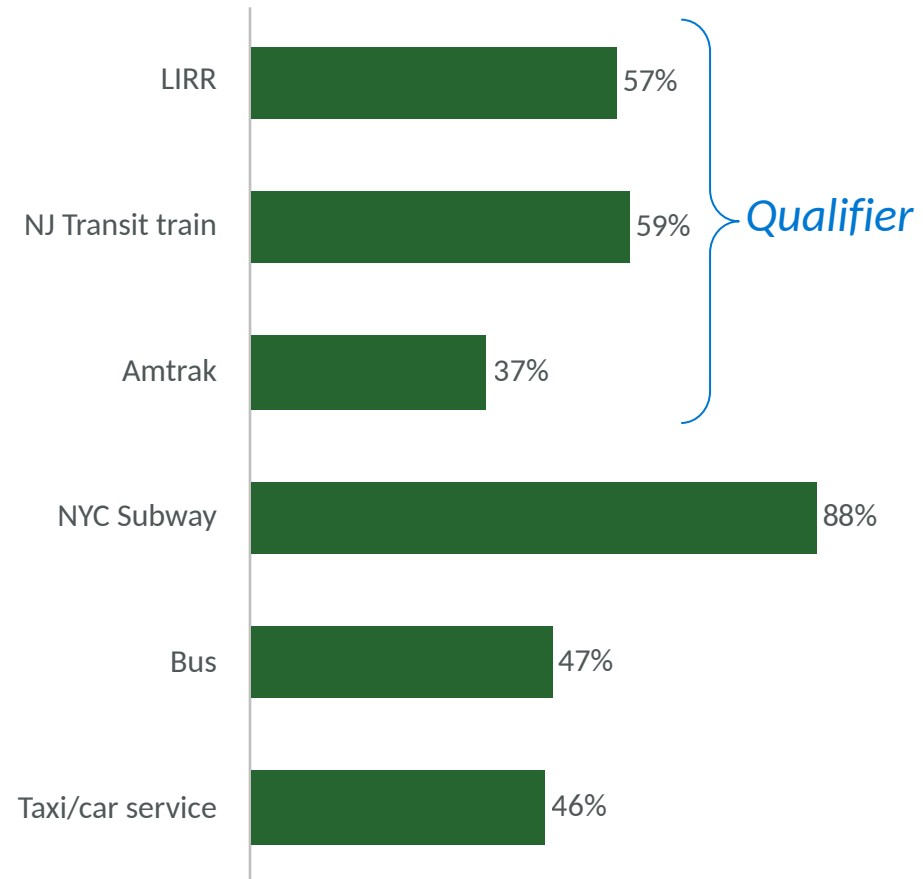## Online survey of 800 commuters who use Penn Station

- All respondents were screened to meet the following criteria:

  » Live in the NY DMA

  » Take a train to/from Penn Station at least one day a month

  » Take the LIRR, NJ Transit or Amtrak trains to/from Penn Station

- Survey conducted October 2019

Commuter profile

On average, how often do you take a train to/ from Penn Station in New York City?

Less than 1 day a month	0%
About 1 day a month	14%
2 or 3 days a month	24%
1 or 2 days a week	20%
3 to 5 days a week	28%
More than 5 days a week	14%

Qualifier

Which of the following forms of transportation do you typically take to/from Penn Station in New York City?

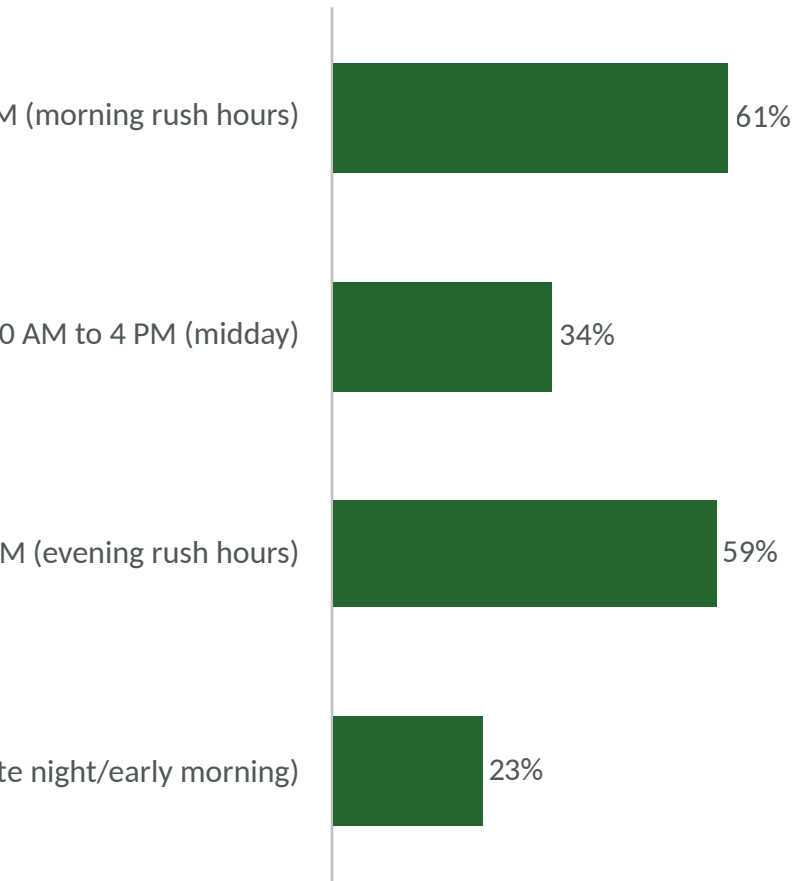|	
LIRR	57%
NJ Transit train	59%
Amtrak	37%
NYC Subway	88%
Bus	47%
Taxi/car service	46%

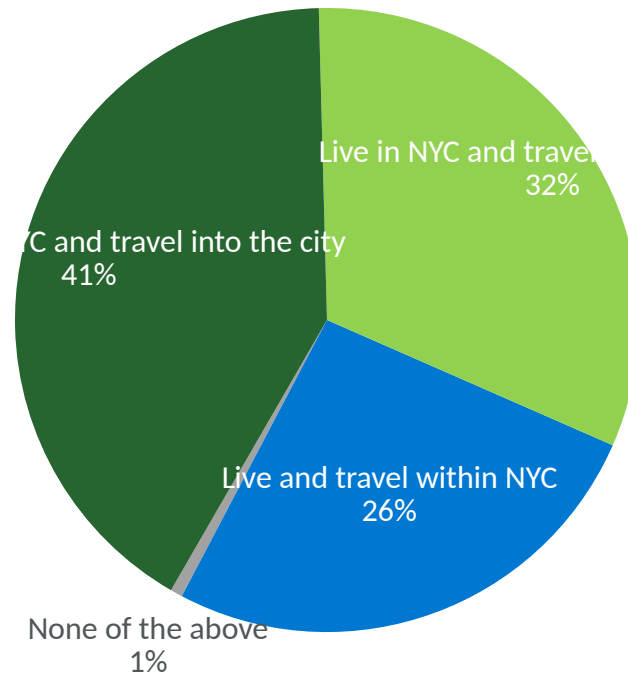*Qualifier*

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Analyses & Findings

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Most respondents are at Penn Station during rush hours; commuting direction varies

During what times of the day are you usually at Penn Station?

[multiple responses accepted]

- M (morning rush hours) — 61%
- 0 AM to 4 PM (midday) — 34%
- M (evening rush hours) — 59%
- te night/early morning) — 23%

Which of the following best describes your travel to/from Penn Station?

- Live in NYC and travel — 32%
- YC and travel into the city — 41%
- Live and travel within NYC — 26%
- None of the above — 1%

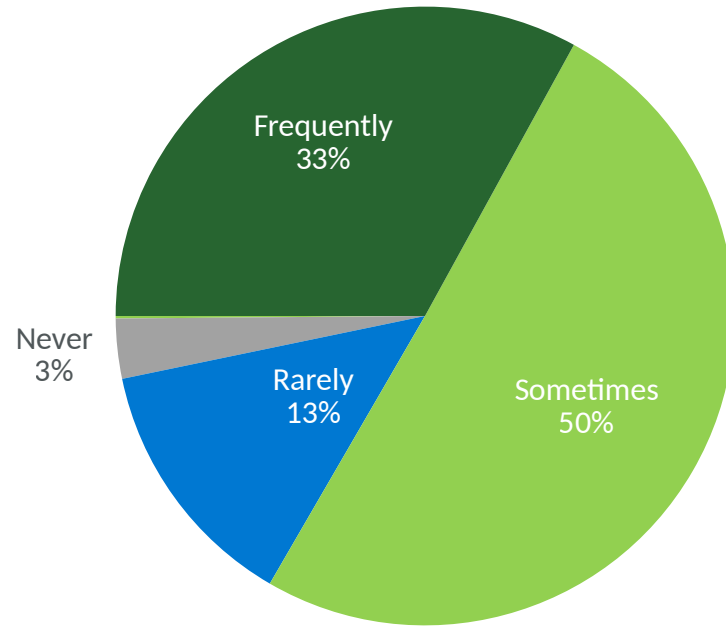# Majority visit stores or restaurants at least sometimes

How often do you visit stores or restaurants <u>within</u> Penn Station?
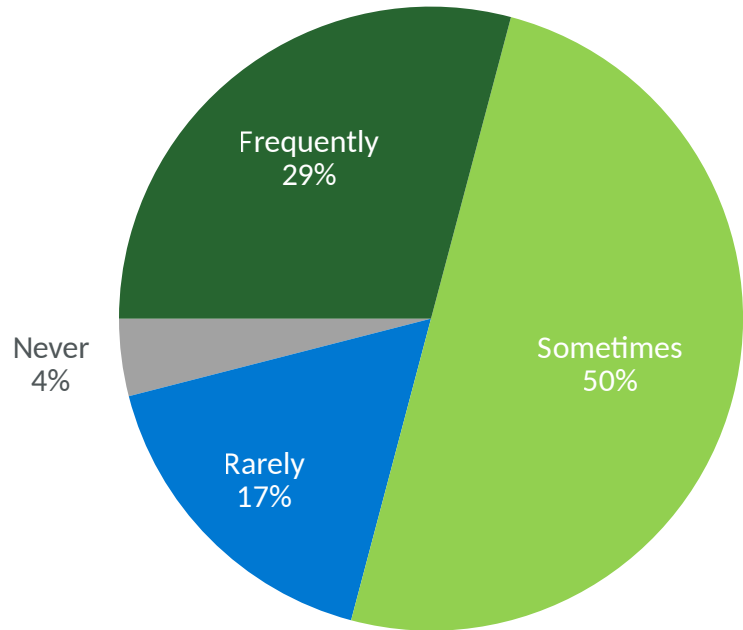
How often do you visit stores or restaurants <u>in the neighborhood</u> of Penn Station?

Pie chart — Within Penn Station:
Frequently 29%
Sometimes 50%
Rarely 17%
Never 4%

Pie chart — In the neighborhood of Penn Station:
Frequently 33%
Sometimes 50%
Rarely 13%
Never 3%

Penn Station "neighborhood" is interpreted broadly

Do you live in the neighborhood of Penn Station?

[among respondents who live in NYC]

Yes 30%
No 70%
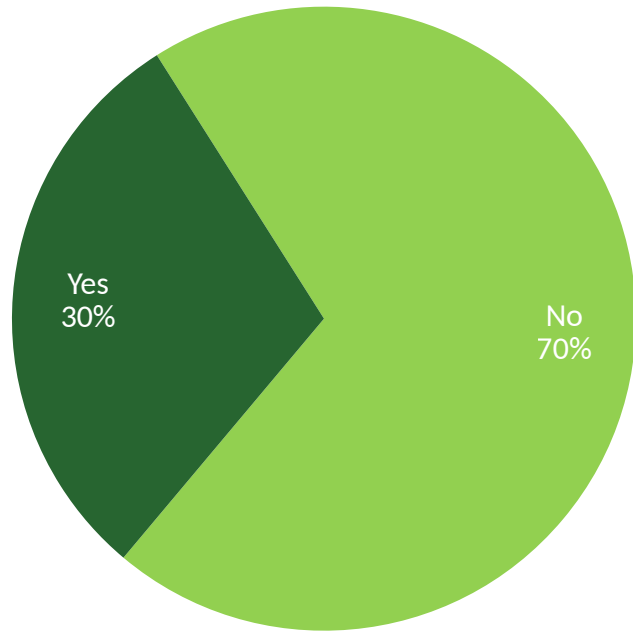
Is your workplace or school located in the neighborhood of Penn Station?

[among respondents who commute to NYC]

Yes 46%
No 50%
Not applicable 4%

Majorities are aware of previous Penn Station building and its replacement by MSG

Are you aware that Penn Station originally included a large, above-ground building like Grand Central Station?

Are you aware that the original Penn Station was replaced by Madison Square Garden?
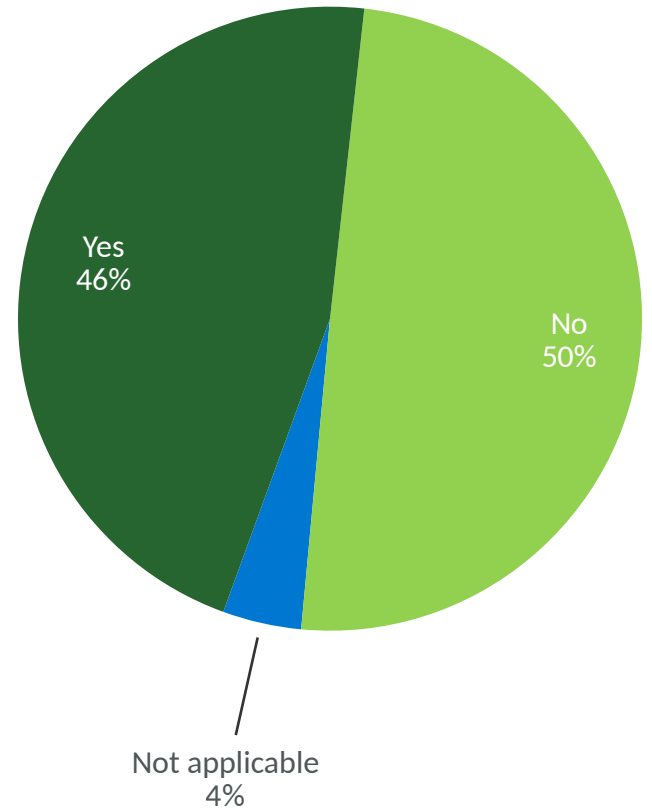
No
31%

Yes
63%

Don't know/Not sure
6%

No
30%

Yes
64%

Don't know/Not sure
6%
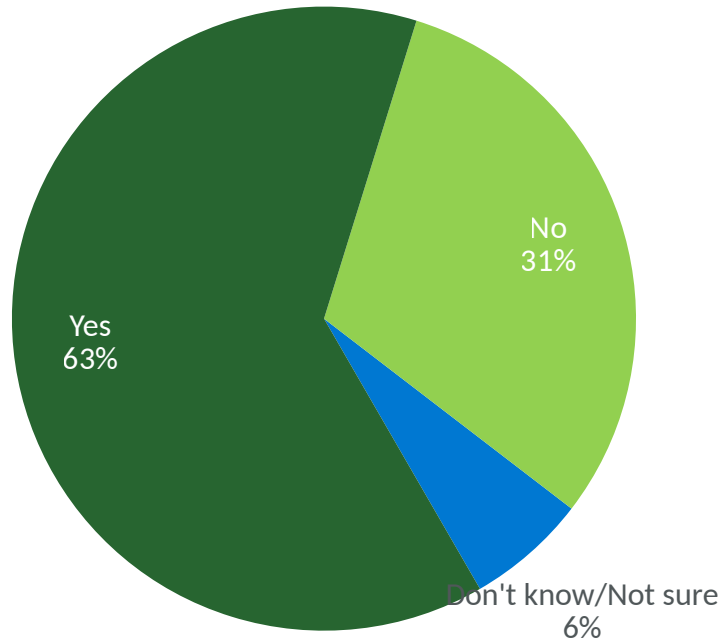
- Men are more likely than women to say they are aware. No differences by age, ethnicity, education, or income.
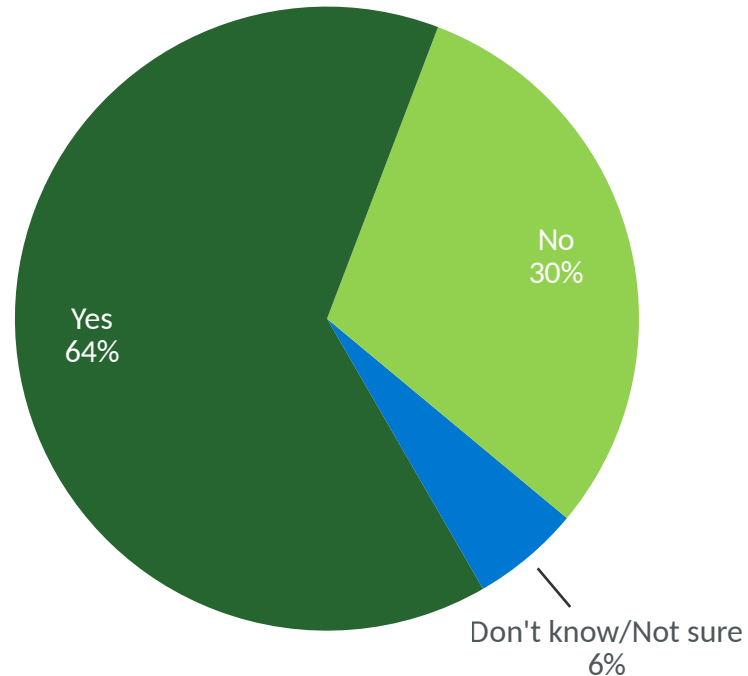
- Men, respondents 55 and older, White respondents, college graduates, and those with $100K+ incomes are more likely to be aware that MSG replaced Penn Station.

Three-quarters express interest in Penn Station history

Would you be interested in hearing more about
the history of Penn Station?

Yes
74%

No
18%

Don't know/Not sure
7%
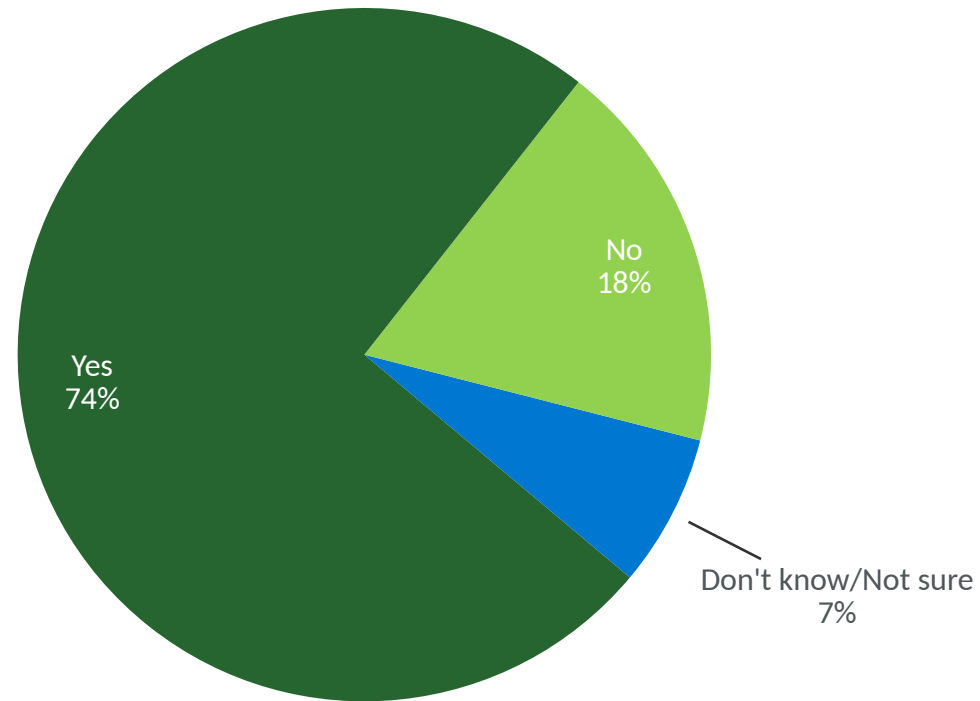
No demographic differences.

More than half say they have heard of plans for Penn Station

Have you heard about any plans to renovate or rebuild Penn Station?

Yes 58%

No 36%

Don't know/Not sure 6%

% Yes

by Gender

Male	65%
Female	52%

by Age

18-34	51%
35-54	57%
55+	76%

by Ethnicity

White	67%
African-American	48%
Hispanic	49%
Asian	50%

by Education

Some college or less	47%
College grad or more	65%

by Income

<$50K	47%
$50-$100K	58%
$100K+	70%
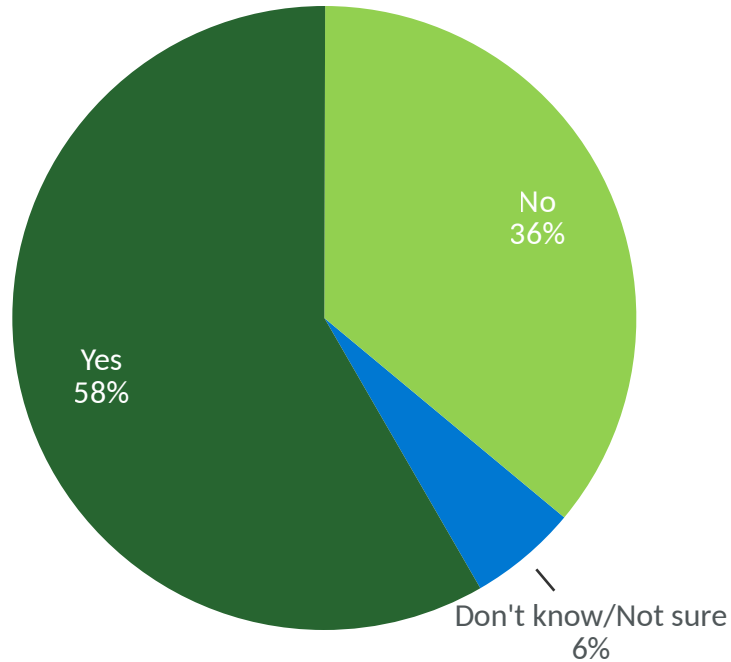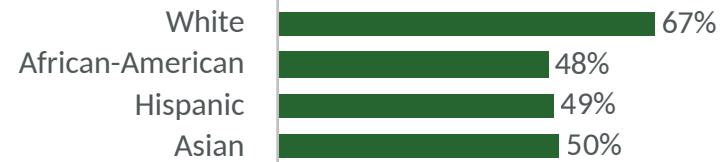
Half or fewer recall *specific* plans; TV/radio and word-of-mouth are the most common sources

Have you heard about any of the following potential plans for Penn Station?

% Heard of

Plan	%
...ew train tunnels under the Hudson River	50%
...Post Office building into a new train hall	50%
A new entrance on 7th Ave. and 33rd St	49%
Widening the LIRR concourse	42%
...g Madison Square Garden to another site	34%
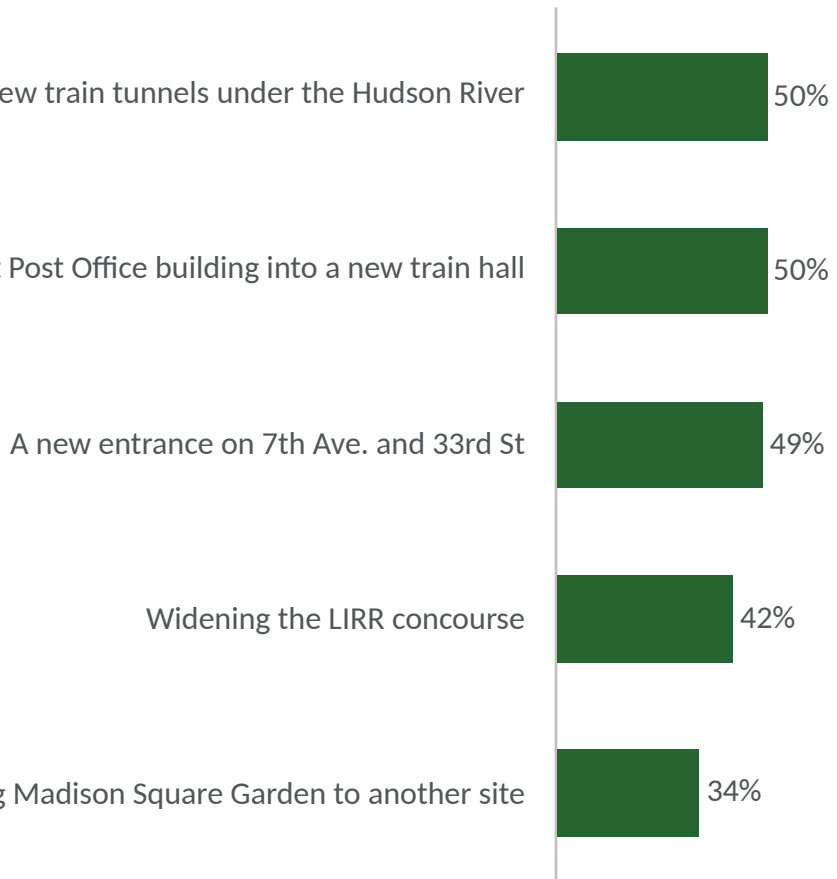
Where did you hear about these plans?

[among respondents who recall specific plans]

Source	%
TV or radio	49%
Word-of-mouth	46%
Online news sources	41%
Newspaper or magazine	39%
Social media	37%
Posters or flyers on trains or at stations	19%

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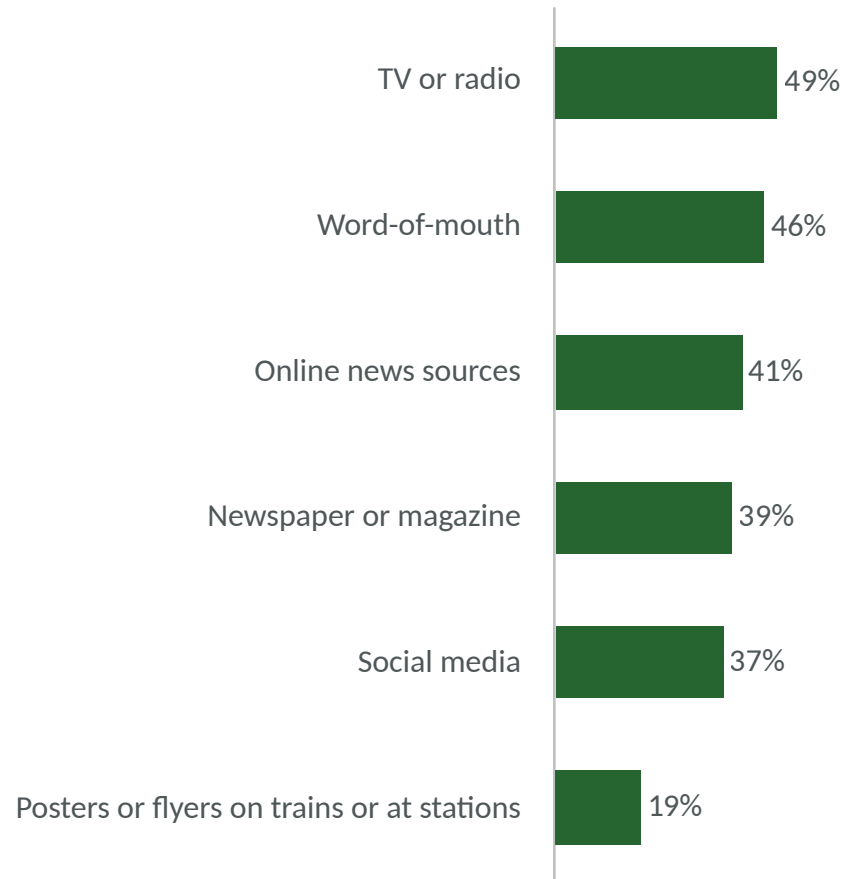
Opinions of Penn Station are *not* highly negative

What is your overall opinion of Penn Station in its current condition?

6% — 1 Extremely Negative
4% — 2
6% — 3
9% — 4
14% — 5
11% — 6
16% — 7
14% — 8
7% — 9
13% — 10 Extremely Positive

Negative 15%
Neutral 50%
Positive 34%
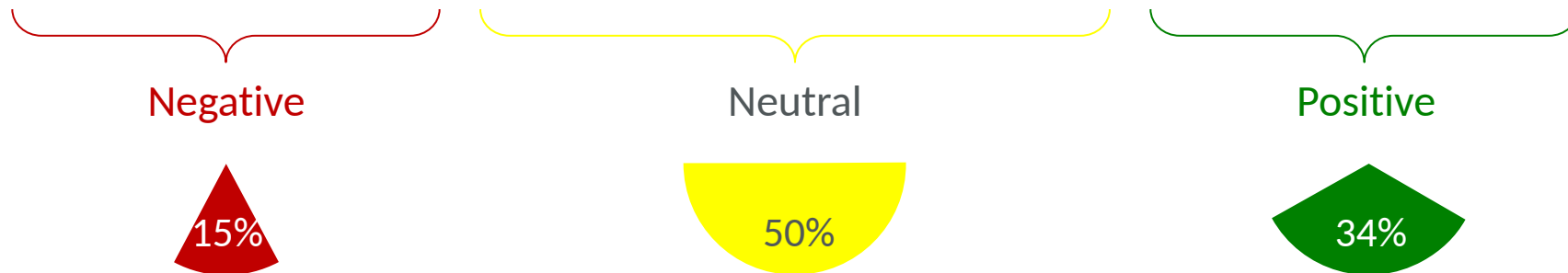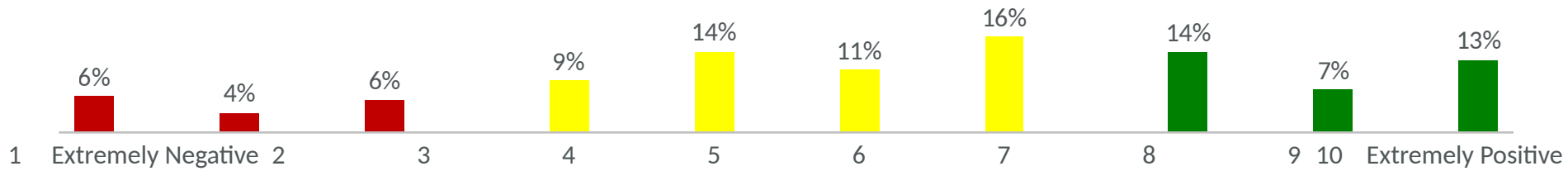
Even among the most negative demographic groups, fewer than a quarter have negative opinions

Negative opinions of Penn Station

by Age

10%	17%	23%
18-34	35-54	55+

by Ethnicity

22%	7%	8%	4%
White		His-panic	

by Education

9%	19%
Some college or less	

by Income

10%	13%	22%
<$50K	$50-$100K	$100K+
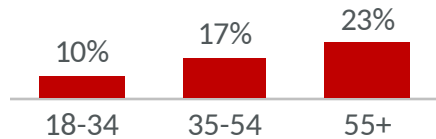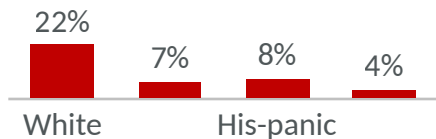
Positive opinions of Penn Station

by Penn Station usage frequency

26%	44%
<3 days/week	
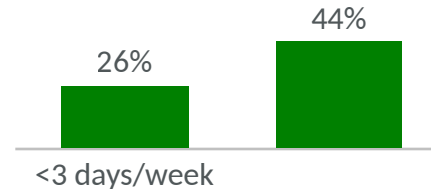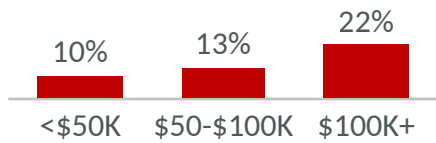
- Commuters who use Penn Station more frequently are more likely to have *positive* opinions

Fewer than half are critical of Penn Station, and substantial minorities disagree

Perceptions of Penn Station
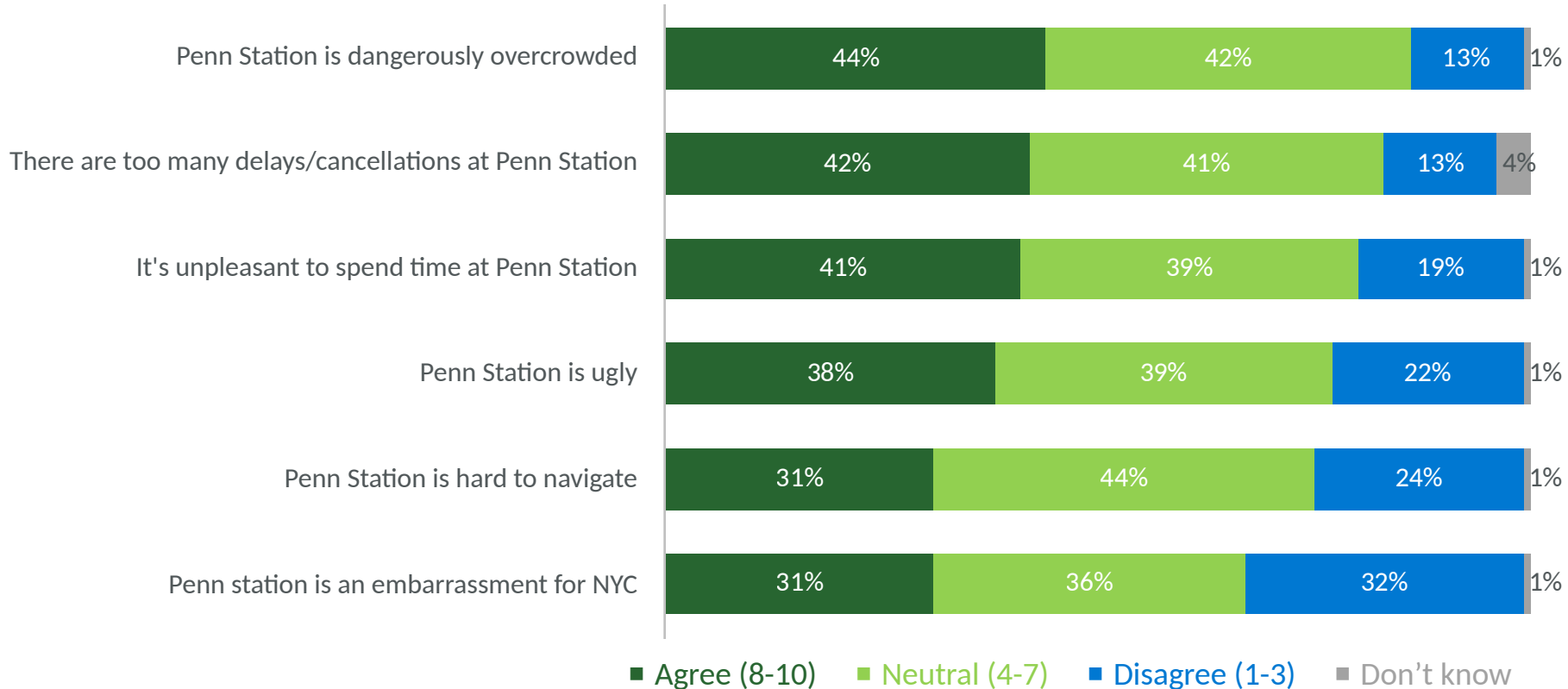
Statement	Agree (8-10)	Neutral (4-7)	Disagree (1-3)	Don't know
Penn Station is dangerously overcrowded	44%	42%	13%	1%
There are too many delays/cancellations at Penn Station	42%	41%	13%	4%
It's unpleasant to spend time at Penn Station	41%	39%	19%	1%
Penn Station is ugly	38%	39%	22%	1%
Penn Station is hard to navigate	31%	44%	24%	1%
Penn station is an embarrassment for NYC	31%	36%	32%	1%

■ Agree (8-10) ■ Neutral (4-7) ■ Disagree (1-3) ■ Don't know

- Respondents 55 and older, white respondents, college graduates, and those with $100K+ incomes are more likely to agree with statements criticizing Penn Station, though even among these groups, agreement levels do not exceed 51%.

Logistical, transportation-related criteria are rated most important

Following are some characteristics that could describe a transportation hub, such as Penn Station. How important are each of these characteristics to you, personally?

% Important (top 3 box)

Characteristic	Value
Provides easy access to trains and platforms	80%
Provides easy connections between modes of transportation	80%
Makes it easy to get information about train arrivals and departures	79%
Is designed for efficient flow of crowds	78%
Has the capacity to handle future growth	68%
Is a comfortable place to spend time	62%
Has an attractive interior	57%
Has appealing shops and restaurants	52%
Has an attractive exterior	46%
Serves as a NYC landmark	46%
Includes outdoor space open to the public	42%
Serves as a venue for performances and cultural events	36%

Most important

Second tier

Fewer than half think these are important

- Respondents 55 and older, white respondents, and those with $100K+ incomes are more likely to value transportation-related criteria.

"Passenger efficiency" message most appealing, "neighborhood development" least appealing

Appeal of messages about Penn Station

Penn Station should be redesigned to maximize quick and efficient movement of passengers throughout the station, to and from the platforms, and entering and exiting the trains
- 42%
- 74%

Rebuilding Penn Station will make it much safer in terms of reducing overcrowding and fire hazards, and improving protection from crime and terrorism
- 37%
- 69%

A redesigned and expanded Penn Station will be an essential and central element of a modernized, more efficient, high capacity transportation infrastructure for the New York metropolitan region
- 34%
- 67%

Penn Station should be reimagined to be one of the world's great train stations, like those in London, Paris, Madrid, and Washington DC
- 36%
- 65%

Penn Station should be redesigned so that it meets the same high standards set by other classic New York City landmarks, such as Grand Central Terminal and the New York Public Library
- 31%
- 64%

Restoring the original Penn Station will contribute to the overall beauty of New York City and to the authenticity that distinguishes it as one of the great cities of the world
- 30%
- 61%

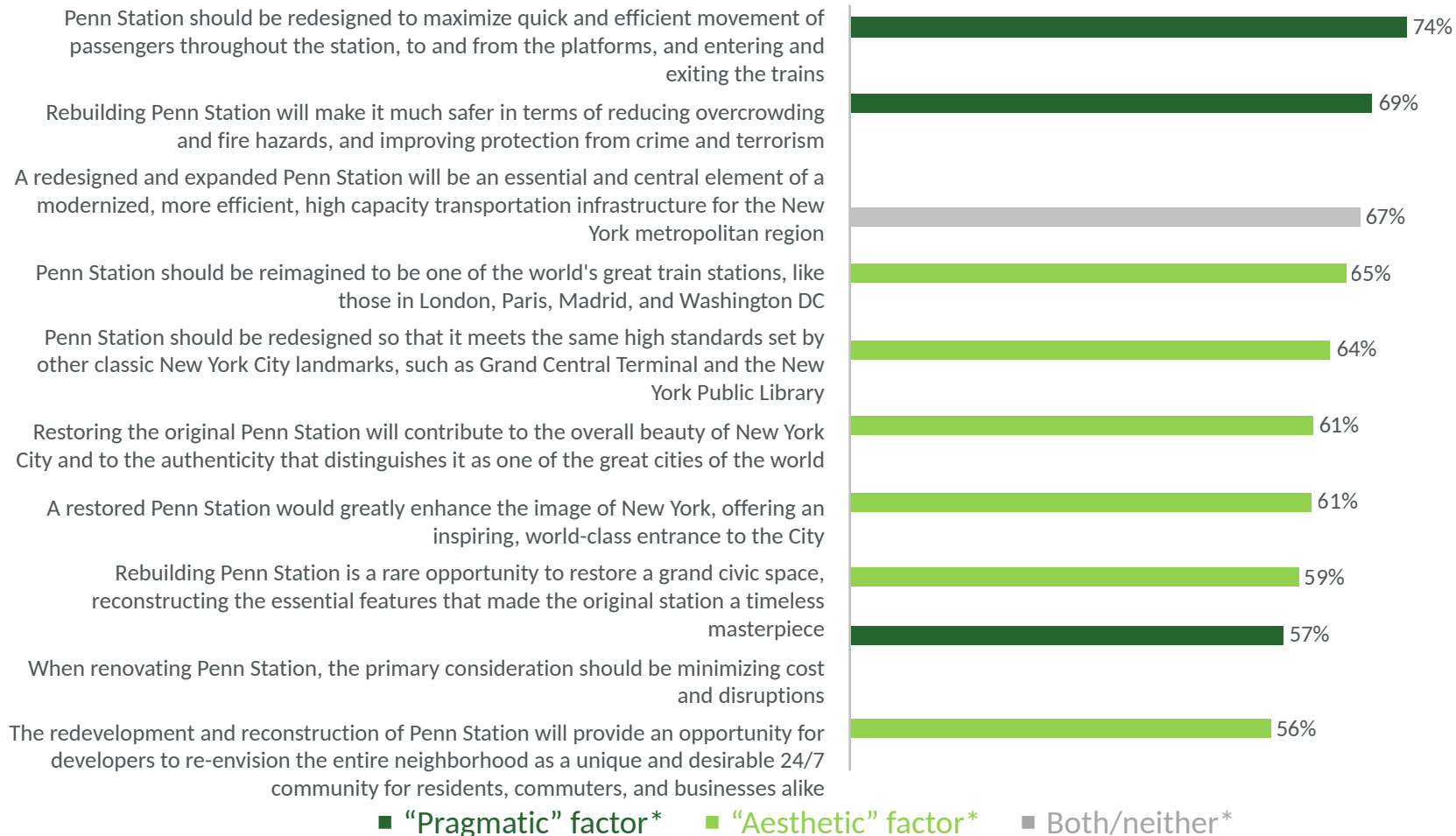A restored Penn Station would greatly enhance the image of New York, offering an inspiring, world-class entrance to the City
- 30%
- 61%

Rebuilding Penn Station is a rare opportunity to restore a grand civic space, reconstructing the essential features that made the original station a timeless masterpiece
- 28%
- 59%

When renovating Penn Station, the primary consideration should be minimizing cost and disruptions
- 28%
- 57%

The redevelopment and reconstruction of Penn Station will provide an opportunity for developers to re-envision the entire neighborhood as a unique and desirable 24/7 community for residents, commuters, and businesses alike
- 26%
- 56%

■ Extremely appealing (10)   ■ Appealing (8-10)

"Pragmatic" messages more appealing than "aesthetic" messages

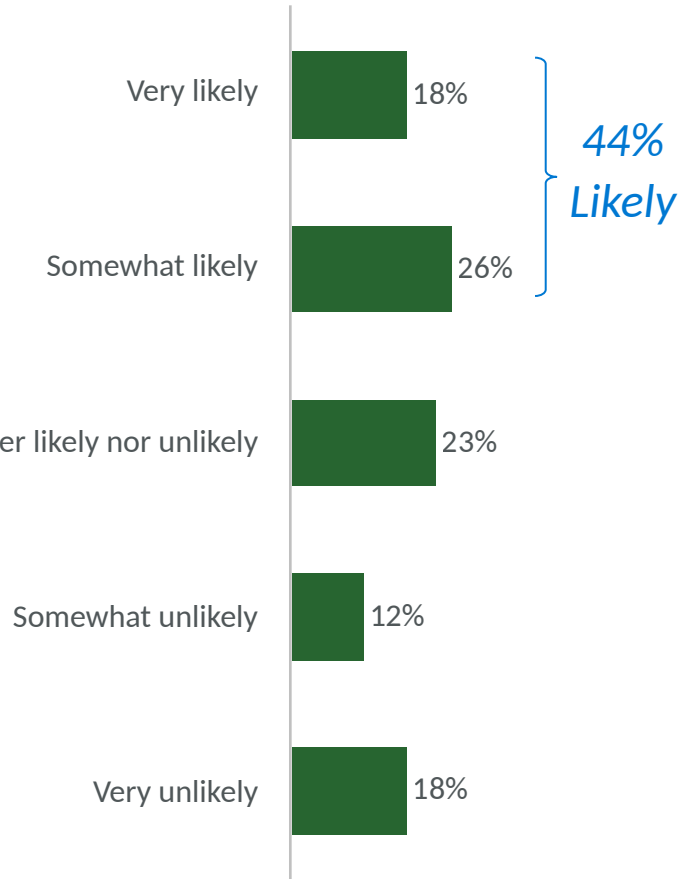## Appeal of messages about Penn Station

Message	Appeal
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■ "Pragmatic" factor*   ■ "Aesthetic" factor*   ■ Both/neither*

*Based on factor analysis – an analytic technique that groups together questions that elicit similar patterns of answers, to identify the key underlying domains. Factor analysis reveals that most messages belong to either a "pragmatic" or "aesthetic" factor, and one item has a low level of association with both (thus belongs to neither factor).

Groups most critical of Penn Station tend to find various messages more appealing

Appeal of messages about Penn Station

Message				
Penn Station should be redesigned to maximize quick and efficient movement of passengers throughout the station, to and from the platforms, and entering and exiting the trains	More appealing to ages 55+	More appealing to White respondents	More appealing to college grads	More appealing to HHI $100K+
Rebuilding Penn Station will make it much safer in terms of reducing overcrowding and fire hazards, and improving protection from crime and terrorism	More appealing to ages 55+		More appealing to college grads	More appealing to HHI $100K+
A redesigned and expanded Penn Station will be an essential and central element of a modernized, more efficient, high capacity transportation infrastructure for the New York metropolitan region	More appealing to ages 55+	More appealing to White respondents	More appealing to college grads	More appealing to HHI $100K+
Penn Station should be reimagined to be one of the world's great train stations, like those in London, Paris, Madrid, and Washington DC	More appealing to ages 55+	More appealing to White respondents		
Penn Station should be redesigned so that it meets the same high standards set by other classic New York City landmarks, such as Grand Central Terminal and the New York Public Library	More appealing to ages 55+		More appealing to college grads	More appealing to HHI $100K+
Restoring the original Penn Station will contribute to the overall beauty of New York City and to the authenticity that distinguishes it as one of the great cities of the world	More appealing to ages 55+		More appealing to college grads	
A restored Penn Station would greatly enhance the image of New York, offering an inspiring, world-class entrance to the City	More appealing to ages 55+			
Rebuilding Penn Station is a rare opportunity to restore a grand civic space, reconstructing the essential features that made the original station a timeless masterpiece	More appealing to ages 55+			More appealing to HHI $100K+
When renovating Penn Station, the primary consideration should be minimizing cost and disruptions				
The redevelopment and reconstruction of Penn Station will provide an opportunity for developers to re-envision the entire neighborhood as a unique and desirable 24/7 community for residents, commuters, and businesses alike	More appealing to ages 55+			

■ "Pragmatic" factor   ■ "Aesthetic" factor   ■ Both/neither

Over two in five say they are likely to donate
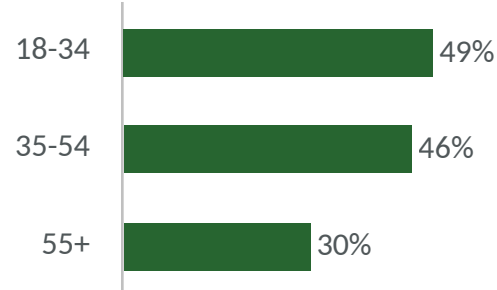
How likely would you be to donate to a non-profit dedicated to rebuilding Penn Station while reimagining it for the 21st century?
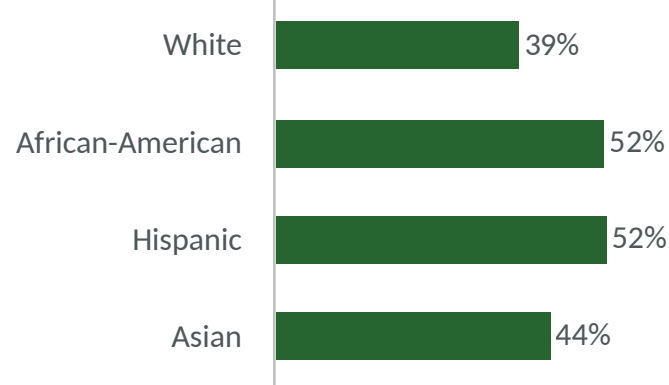
Very likely	18%
Somewhat likely	26%
Neither likely nor unlikely	23%
Somewhat unlikely	12%
Very unlikely	18%

44% Likely

% Likely to donate

by Age

18-34	49%
35-54	46%
55+	30%

by Ethnicity

White	39%
African-American	52%
Hispanic	52%
Asian	44%

21

Summary & Implications

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Summary & Implications

- Commuters value ease and efficiency of travel most (e.g., easy access to trains and platforms, easy connections between modes of transportation, convenient information about arrivals and departures, and efficient flow of crowds).

- "Pragmatic" messages (e.g., passenger efficiency, safety) are rated more appealing than "aesthetic" messages (e.g., enhancing the image of NYC, restoring a grand civic space).

IMPLICATION:

Messages that promote improvements to the transportation-related aspects of Penn Station are likely to garner the widest support among metro area commuters.

Summary & Implications

- Commuter opinions and perceptions of Penn Station are not as negative as expected.

  » Only 15% evaluate Penn Station negatively, while 34% evaluate it positively and half are neutral.

  » Less that half of respondents agree with various negative statements about Penn Station (e.g., "it's ugly," "it's hard to navigate" etc.), and substantial minorities disagree.

- Older respondents (55+), white respondents, college graduates, and those with $100K+ household incomes are more likely to be critical of Penn Station, but even among these groups, opinions and perceptions are not overwhelmingly negative.

IMPLICATION:

Don't base communications strategy on the assumption that most commuters view Penn Station as a problem or "embarrassment."
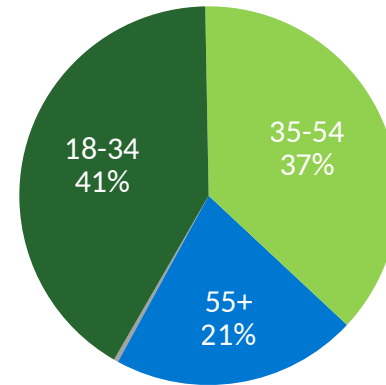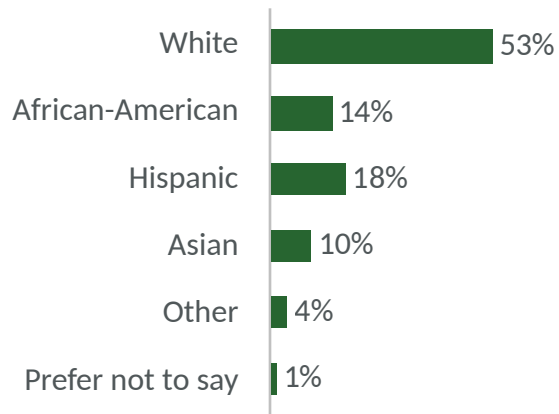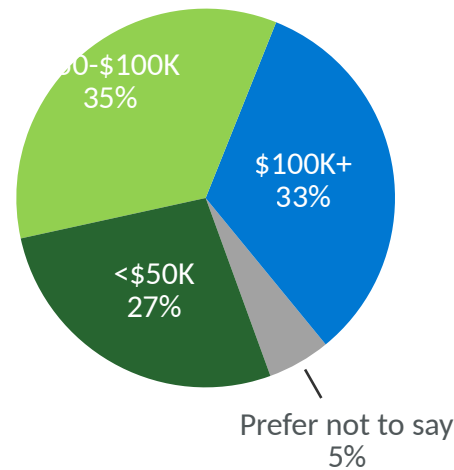
Appendix

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Sample Demographics

Gender

- Male 49%
- Female 50%
- Prefer not to say 1%

Age

- 18-34 41%
- 35-54 37%
- 55+ 21%

Ethnicity

- White 53%
- African-American 14%
- Hispanic 18%
- Asian 10%
- Other 4%
- Prefer not to say 1%

Income

- $50-$100K 35%
- $100K+ 33%
- <$50K 27%
- Prefer not to say 5%

Education

- College grad 39%
- College or less 34%
- Post-graduate ed 26%
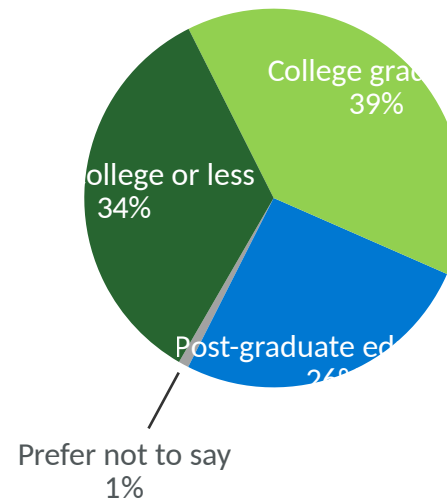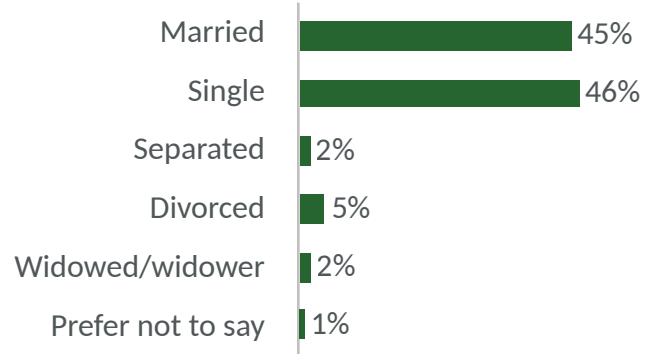- Prefer not to say 1%
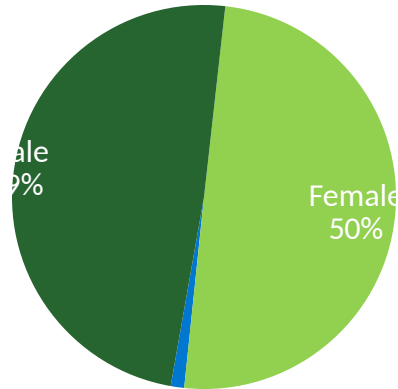
Note: Percentages may not appear to add to 100 due to rounding.

Sample Demographics

Marital status

Married	45%
Single	46%
Separated	2%
Divorced	5%
Widowed/widower	2%
Prefer not to say	1%

Children at home

Yes, I have children living with me	39%
No, I have children, but they are not living with me	11%
No, I do not have children	48%
Prefer not to say	2%

Employment status

Self-employed	9%
Work full-time for an employer	63%
Work part-time for an employer	10%
Homemaker	3%
Full-time student	6%
Permanently sick, disabled, or unable to work	1%
Unemployed or temporarily laid off	3%
Retired	6%
Prefer not to say	1%

Political party

Democratic Party	53%
Republican Party	19%
Other	1%
Don't identify with any party	19%
Prefer not to say	7%