

Executive Summary

SANDAG conducted an origin-destination transit rider survey to collect detailed demographic and travel behavior data in 2023, resulting in the release of a comprehensive report which includes the following key insights:

Key Findings

Public Transit is Important to the Region's Economy

Two thirds of those surveyed (66%) indicated they are currently employed. Overall, work trips represent almost 20% of all trips made. College / University makes up roughly 7% of trips, shopping 6% of trips, and Visiting Friends / Relatives and Personal Business both make up 5% of trips. Additionally, the transit systems in the San Diego region also service cross border travelers with 11% of riders reporting living in Mexico. Please note that all trip type descriptions are based on the provided origin and destination place types unless otherwise stated.

Public Transit Provides a Needed Service to Residents with Lower Incomes

The results of the survey show that 18% of all transit users in the region have annual household incomes of less than \$15,000 and another 18% have household incomes between \$15,000 and \$29,000. SANDAG population estimates from 2022 show that 6% of the total population have annual household incomes of less than \$15,000. This indicates that lower income households rely heavily on public transit. Please note that SANDAG's definition for "low income" is based on 200% of the federal poverty level.

Public Transit Provides a Needed Service to Residents without Automobile Access

The results of the survey show that 38% of all transit users in the region do not have access to a household vehicle. Of those who do have a household vehicle, an additional 61% did not have access to the vehicle for this trip. This indicates that 24% of riders are choice riders.

Public Transit is Important to Education in the Region

Of those surveyed, 28% indicate they are students with 21% of these being college / university students. Trips to and from educational institutions constitute 18% of all trip types made, respectively. This translates to over 45,000 daily trips for the purpose of education.

Half of Public Transit Users were Hispanic / Latino

Of those surveyed, 52% of riders speak another language other than English at home (82% of those who speak another language at home speak Spanish) and 15% of all surveys conducted, were conducted in Spanish. Overall, 49% of riders indicated they were Hispanic / Latino. Additionally, 25% of riders were White / Caucasian, 11% of riders were Black / African American, 10% were Asian, and 5% were other race / ethnicity.

Trends in Travel Behavior

Resource Systems Group (RSG) conducted an analysis of 2023 data compared to the 2015 survey data. Some of the notable trends that were observed include the following:

- Passengers made fewer local bus trips in 2023 and made more rail transit trips. This change is partially explained by the opening of the Mid-Coast Blue Line Trolley extension.
- The number of resident trips has decreased since 2015 but there were more cross-border trips in 2023.
- There were fewer mandatory (work, school) resident transit trips and more non-mandatory transit trips in 2023.
- The average walking and driving distances to access transit were slightly shorter in 2023 than 2015 (0.53 miles in 2015 to 0.31 miles in 2023 for walking and 4.97 miles in 2015 to 4.44 miles in 2023 for Park-and-Ride).
- The patterns for Kiss-and-Ride (KNR), where passengers are dropped off or picked up at the transit stop / station, and Park-and-Ride (PNR) have stayed about the same between 2023 and 2015.

Other Findings

Travel Behavior Insights. The analysis revealed significant travel behavior patterns among transit riders:

- **Trip Types:** The predominant trip type was identified as home to work, representing 35% of all journeys, followed by home to other locations at 23% and home to school at 16%. Please note that these figures are based on creating the “trip type variable” rather than the individual origin and destination place types.
- **Transit Usage:** 59% of passengers indicated that they utilized regional transit five days or more a week, compared to 39% before the COVID pandemic. However, when respondents who indicated they did not use transit prior to COVID, the figure is the same with 59% of riders using transit at least five days a week.
- **Fare Payment:** About 69% paid full fare, with 85% opting for the PRONTO Mobile App or PRONTO Card. Of those who used PRONTO, 7% of fares were Youth Opportunity Pass Program (aged 6-18). Please note that passengers under 18 are underrepresented in the sample due to the limitations of interviewing minors.

Passenger Demographics. The survey provides a comprehensive profile of transit passengers:

- **Vehicle Availability:** 63% of passengers reported having at least one vehicle available at home, 37% did not have any vehicles available
- **Age:** 55% of respondents indicated they were under the age of 35
- **Gender:** 57% identified as being male.

Background

In 2023, the San Diego Association of Governments (SANDAG) conducted a comprehensive Origin and Destination (OD) On-Board Transit Passenger Survey. This analysis included transit systems operated by both the Metropolitan Transit System (MTS) and the North County Transit District (NCTD). An On-to-Off (O2O) count was also performed, assessing specific boarding and alighting locations for bus and rail services with a minimum threshold of 2,800 average weekday riders. The aim was to collect data from a minimum of 31,000 OD surveys, 21,030 rail O2O pairs, and 9,000 bus O2O pairs. Ultimately, SANDAG exceeded these goals, collecting 35,262 OD surveys, 43,019 rail O2O pairs, and 16,490 bus O2O pairs.

Purpose and Applications

This survey serves multiple mandated requirements including compliance with the Federal Transit Administration (FTA) requirements under Title VI of the Civil Rights Act, development of customer profiles for transit planning and marketing, and provision of baseline data for future transit system assessments—specifically for evaluating the impacts of the Mid-Coast Blue Line Trolley extension.

The 2023 OD survey was instituted to gather detailed travel behavior data, providing granular insights into demographic characteristics, travel patterns, usage rates, and payment preferences among transit users in the San Diego region. The survey strategically aimed not only to inform immediate planning and marketing approaches but also to satisfy FTA compliance requirements under Title VI. Strategic applications of the survey data include:

- **Support for FTA Funding Applications:** The survey's findings bolster activity-based model development crucial for competing for federal funding for transit capital investments.
- **Demographic Compliance:** The data collected ensures adherence to Title VI, promoting equity in service delivery.
- **Customer Profiling:** The insights will aid agencies in tailoring services to meet transit users' needs effectively.
- **Post-Project Evaluation:** The survey will inform intended assessments following the Mid-Coast Trolley project, ensuring that projected benefits are realized and addressed.

Survey Design and Administration

The survey's design was a collaborative effort between SANDAG, MTS, NCTD, ETC Institute, and Resource Systems Group (RSG) focusing on creating a robust sampling strategy and a clear survey instrument. The data collection timeline spanned various phases across the spring and fall of 2023. The methodology ensured that the data collected would be statistically significant for meaningful analysis. The survey phases included:

- **Rail O2O Counts:** Conducted from March 14 to June 8, 2023.
- **Bus O2O Counts:** April 24 to May 4, 2023, with a supplementary day on October 9, 2023.
- **Spring OD Collection:** From April 6 to June 14, 2023.
- **Fall OD Collection:** August 21 to November 30, 2023.

Surveys were administered across regions and included a range of demographic questions aimed at capturing the full spectrum of transit users in the San Diego area. It is worth noting that these surveys usually occur every five years but were started and not completed in 2020 due to the pandemic.

Contents of the Full Report

The complete report encompasses six major sections. These six sections include an Introduction, Population and System Level Comparisons, System Key Demographics, Route Level Results, Survey Administration, and Survey Weighting and Expansion. The appendices feature essential documents, including the Survey Sampling Plan, Questionnaire, and route maps.