

Appendix F: 2017 On Board Survey Report

Demographics and Travel Patterns of Marin Transit Riders

Marin Transit conducted its most recent passenger survey in April 2017 and a ridecheck of fixed route services in late 2017. Marin Transit completed the most recent complete Short Range Transit Plan (SRTTP) in 2020 with detailed performance and demographic data. The SRTTP evaluates performance relative to the type of route, demographic characteristics of ridership, transfer activity, rider origins, and activity at individual stops. Marin Transit sets performance targets for each route based on a typology that reflects the market served.

Data Collection

- In Spring 2017, Marin Transit passenger survey was administered in both English and Spanish in a partnership with the Metropolitan Transportation Commission. Surveys were distributed on all Marin Transit routes except for the following: Route 66 (the seasonal Muir Woods shuttle) and supplemental school routes (Routes 113, 115, 117, 119, 122, 125, 139, 145, 151, and 154).¹
- Marin Transit conducted its most recent ridecheck of local fixed routes in the Fall of 2017.

Service Typologies

Marin Transit operates one mode: local bus service. Marin Transit classifies routes with common characteristics by “typology,” a concept first introduced in the District’s FY 2011-12 Short Range Transit Plan (SRTTP). Typologies rationalize comparisons between routes, as different routes serve different markets. Marin Transit’s service typologies are: Local Trunkline, Local Basic, Local Connector, Supplemental School, Rural, Recreational, and Partnership. Based on the characteristics of the markets served by each route typology, Marin Transit assigned productivity targets, passengers per hour of revenue service, and per passenger operating cost subsidy.

Ridership Characteristics by Typology

Based on the survey data, ridership characteristics for each typology were determined. Productivity goals are met if performance exceeds the target, and the subsidy goal is met if performance is less than target. Note that Supplemental School, Recreational, and Partnership routes were excluded from the 2017 onboard survey.

- **Local Trunkline (Routes 35, 36, & 71X):** These routes had the highest percentage of work trips and work-related trips of all service types, and the lowest percentage of riders under age 16 and over 65. These routes also had the highest percentage of riders who speak Spanish at home and riders who speak English less than “very well.” About 65 percent of riders identify as

¹ Marin Transit’s supplemental school route numbering changed in Fall 2021 from 100-series to 600-series.

Hispanic or Latino, and 55 percent identify as a race other than White/Caucasian, the most of any service type.

- **Local Basic (Routes 17, 22, 23, 23X, 29, & 49):** Regular local service almost exactly mirrors the system as a whole. Compared to other typologies, a slightly higher percentage of riders on these routes (40 percent) have no car available to them.
- **Local Connector (Routes 219, 228, 233, 245, 251, & 257):** Riders on this type of service are typical of the service overall, with more school trips than other non-school service typologies and more shopping trips. Consistent with the higher percentage of school trips, these routes also have a higher percentage of riders under the age of 18.
- **Rural (Routes 61 & 68):** The two Stagecoach routes are used by commuters and recreational travelers who ride the service to access parks in West Marin. Over a third of respondents reported using the service for social or recreational purposes, the highest of all service types. These routes also have the largest percentage of riders over 65, and riders are the least racially diverse, with only 22 percent identifying as a race other than White/Caucasian and 27 percent identifying as Hispanic or Latino.

Transit Rider Market Assessment

To update the District's Short Range Transit Plan, Marin Transit utilized the results from the 2017 passenger survey to better understand the demographic characteristics and transit travel patterns of our passengers.

"Typical" Characteristics of Marin Transit Riders

Marin Transit staff drew the following conclusions in comparing passenger demographics from the onboard survey and U.S. Census data from Marin County:

- The strongest indicator of transit usage is the number of workers per household. Survey respondents who said there were three or more working persons in their homes accounted for over one-third of responses (37 percent), compared to just five percent of county residents. Note that in some cases multiple members of a household may have responded. Census data is reported data based on the number of households and not individuals.
- The next-strongest indicator of transit usage is access to an automobile. Members of households with no vehicle available account for a share of transit ridership seven times higher than their proportion of the general population. While only five percent of county residents have no car at home, over one-third of Marin Transit riders (39 percent) said they did not have access to a car.
- Number of persons per household is also a strong indicator: 15 percent of survey respondents said there were five people in their household (compared to four percent countywide), and 11 percent said there were six or more (compared to two percent in the county as a whole).
- Race is another strong indicator of transit usage. Specifically, individuals identifying as something other than White, Asian, or "other" accounted for 60 percent of transit riders but only about 18 percent of Marin residents.

- Use of a language other than English at home is another indicator of transit usage, as survey respondents who said Spanish was spoken in their homes accounted for 38 percent of responses, compared to only about 13 percent of Marin residents.
- Household income is another indicator of transit usage. Persons from households earning less than \$25,000 annually accounted for 35 percent of all transit riders though they represent only 12 percent of county residents.
- In Marin County, neither age nor gender is an indicator of propensity toward fixed-route transit usage. In Marin County, seniors and youth make up a somewhat smaller percentage of Marin Transit fixed-route riders than their proportion among all county residents.²

Locations of “Typical” Transit Riders

Staff used the characteristics and ratios identified in the previous section (e.g., a ratio of 7:1 for zero-car households) to analyze demographics by census tract, weighted by population densities. The census tract is the smallest geographic unit that has data available for all characteristics. The next step was to determine geographic locations within the county where disproportionate numbers of “typical” transit riders live. Based on natural breaks, staff developed “high,” “medium-high,” “medium-low” and “low” categories to rate propensity of anticipated demand for transit services. The categorization for each census tract is shown in Figure 1. Results of the Propensity Analysis were as follows:

- Only one tract within the county scores “high”: Census Tract 1122.01 in the Canal District. Census Tract 1122.01 is extraordinarily dense (58,730 persons per square mile in 2015) and scores highly in all categories: 42 percent of households have annual income of less than \$25,000, 90 percent of individuals identify as Hispanic or Latino (of any race), Black or African-American, American Indian/Alaska Native, or Hawaiian/Pacific Islander, 19 percent of households have no vehicle, 17 percent have three or more workers, 30 percent have five or more members, and Spanish is spoken in 84 percent of households.
- Another nine tracts score “medium-high.” These include:
 - Tract 1290 in Marin City, which scores highly in categories including income (35 percent of households below \$25,000) and race (62 percent).
 - Tract 1192.01 south of Sir Francis Drake Boulevard, west of Highway 101 and east of Bon Air Road in Larkspur and Kentfield. Population density in this tract, which includes The Tamalpais apartments for seniors, is the main contributor to its high score at 9,797 persons per square mile.
 - Tracts 1122.02, 1121, 1110, and 1090.01 in the Canal District and downtown and southern portions of San Rafael.

² Many seniors use paratransit or other mobility management programs available from Marin Transit and are not included in the results of the fixed route onboard survey. Supplemental school routes were also not included in the survey.

- Tracts 1022.02, 1022.03, and 1041.02 in downtown and central Novato
- Another 14 tracts score “medium-low.” These are clustered in Novato, in central Marin in San Rafael and San Anselmo, and in southern Marin in Corte Madera, Tam Junction, Strawberry, and Sausalito.
- The remainder of the county scored “low” in the analysis

Location of Jobs

Employment in Marin County is relatively dispersed with notable clusters in a few locations. These areas include: Highway 101 corridor in Novato extending from downtown Novato south to the Hamilton Air Force Base redevelopment area; the Northgate District of San Rafael and adjacent Smith Ranch area; downtown and southeastern San Rafael extending into Larkspur and Corte Madera; and northern Sausalito. County employment density is shown in Figure 2.

Origins and Destinations

The 2017 passenger survey asked riders to identify the origin and destination of their current trip. Staff tallied the numbers of trips within and between county subareas defined by Marin Transit. The findings included:

- By far the strongest pairings are Downtown San Rafael and the Canal District (accounting for 5.3 percent of all trips) and the Canal District and Northgate (3.7 percent).
- The pairing of the Canal District and the eastern portion of San Rafael accounts for 2.0 percent of trips.
- Nine of the ten strongest pairs include Downtown San Rafael and/or the Canal District.
- After the Canal District, trips to or from Downtown San Rafael most often start or end in Downtown Novato, Mill Valley/Tam Junction, and Northgate.
- The strongest pairing outside of the Canal District and Downtown San Rafael is travel between Northgate and Central Novato.

Travel patterns for Marin County local transit ridership are illustrated in Figure 3.

Figure 1: Transit Propensity

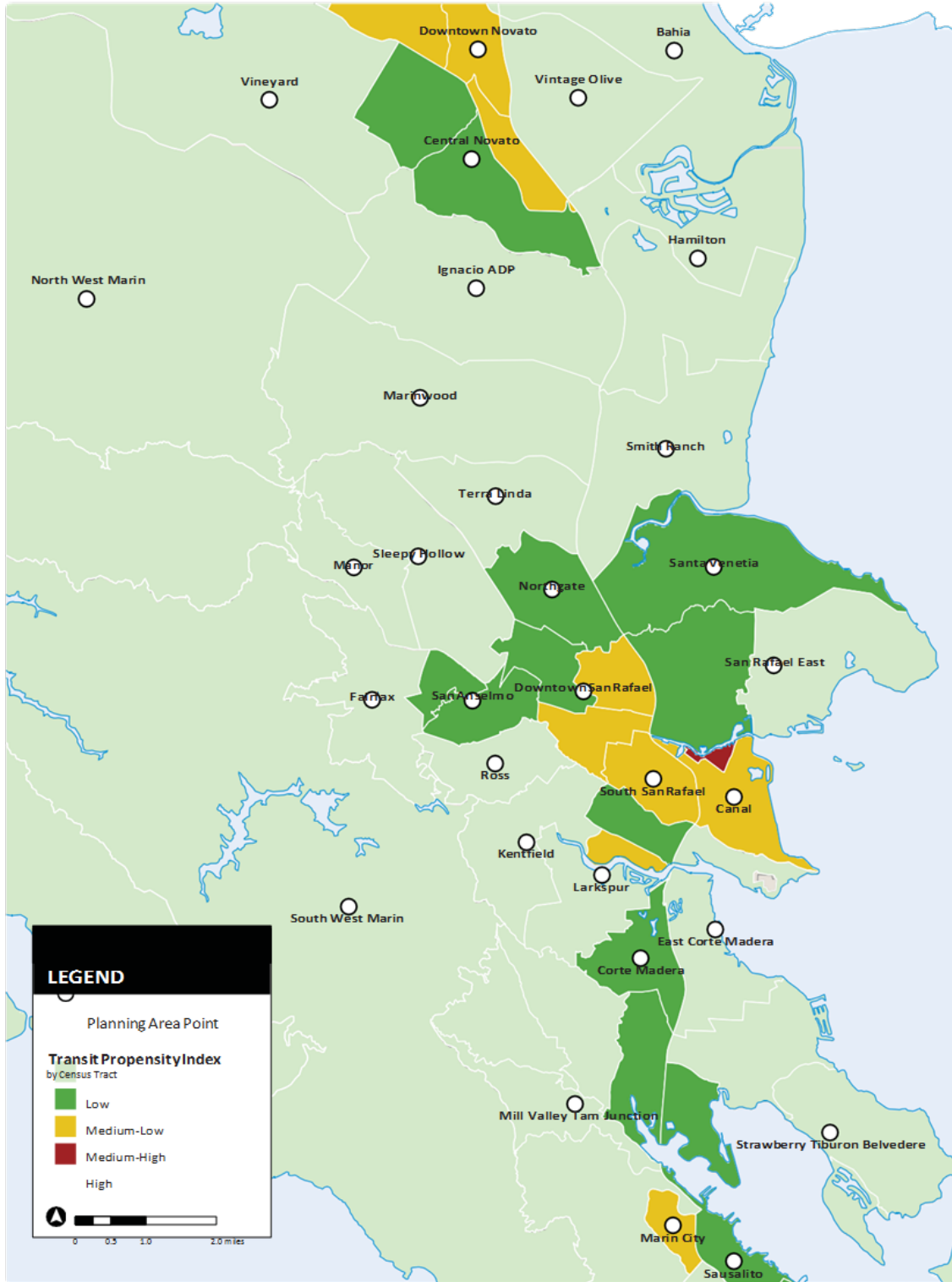


Figure 2: Employment Density

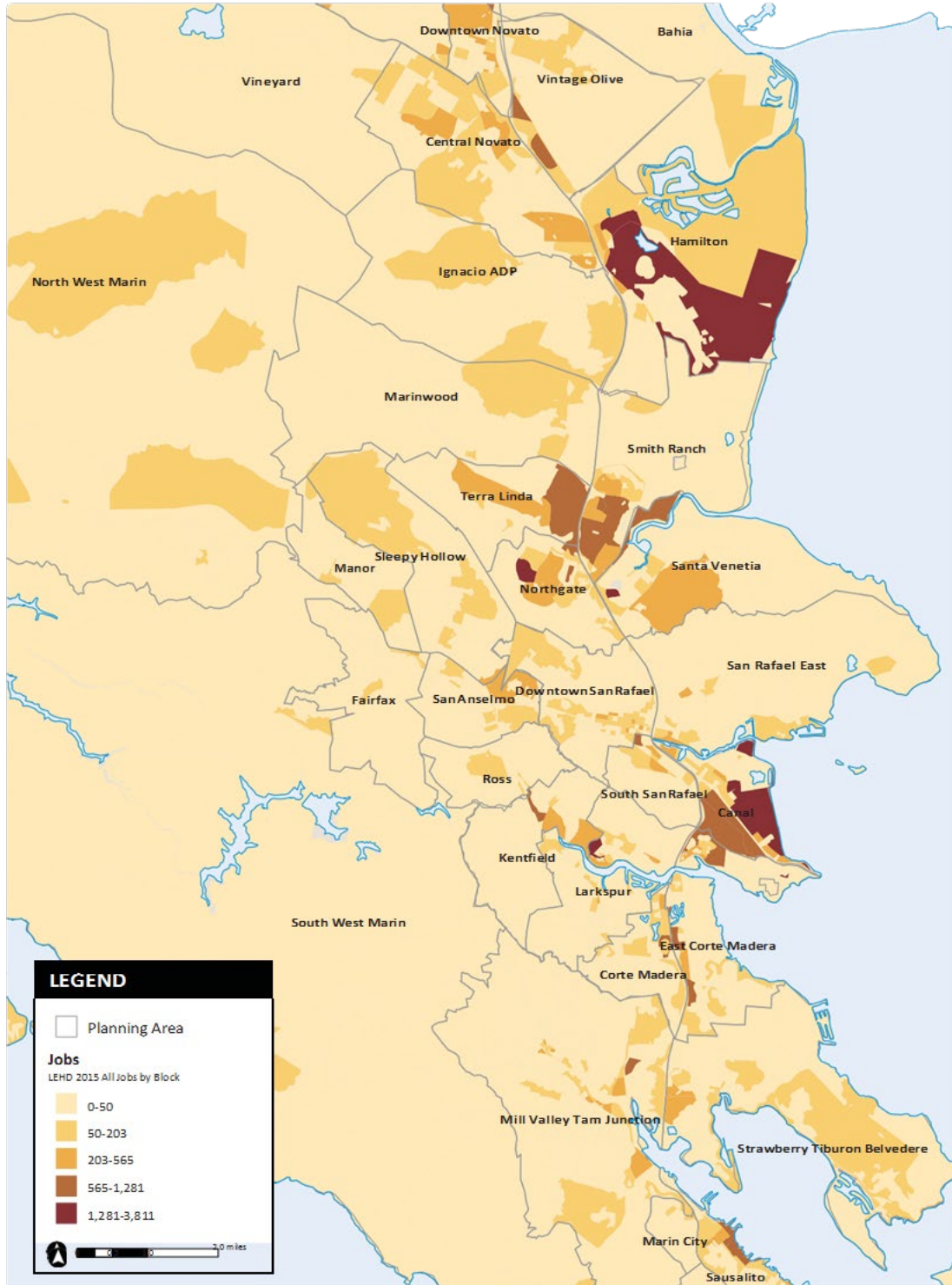


Figure 3: Passenger Origin and Destination

