2024 SamTrans Triennial Survey

samTrans

Connecting the Peninsula

Key Findings | Julian Jest, Manager, Market Research
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Executive Summary

- SamTrans serves mostly low-income riders (94% of riders)

- High dependency on SamTrans for mobility: 79% of riders don't drive/have access to a car

- 81% of riders are satisfied with SamTrans, including with improvements from the Reimagine SamTrans project

- The average rider frequency (4 days/week) has returned to pre-pandemic levels

Methodology

- Field dates: Sept. 17, 2024 through Nov. 21, 2024
- Survey offered in English, Spanish and Chinese
- 55% of customers approached completed a survey
- Sample size: $N = 3,248$
- Surveys weighted by route according to SamTrans ridership
- Margin of Error (MOE): Overall MOE= +/- 1.63%

How Riders Use SamTrans

- Nearly one-third of riders (32%) are relatively new to riding SamTrans, having used the service for one year or less

- 74% of riders rely on SamTrans as their primary mode of transportation

- 75% ride at least four days per week

- Nearly two-thirds (63%) of riders use single ride tickets, Clipper cash or day passes

- Riders use SamTrans most often for work trips; this is true across all time periods

Ticket Type x Frequency

Riders using cash tickets average more than four rides per week – many would save money by switching to a Monthly Pass
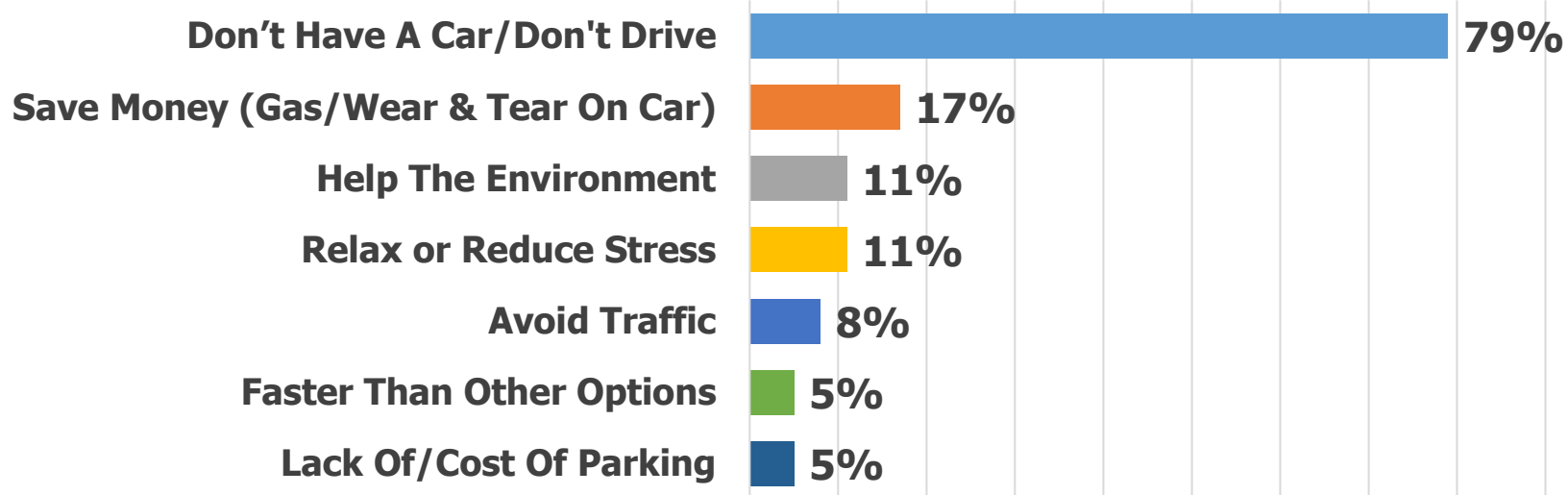
2024		What type of ticket/card did you use (today)?						
	Total	One way ticket/cash	Day Pass/cash	Clipper: Cash	Clipper: Monthly Pass	Clipper: Way2Go Pass	Youth Unlimited	Other
6-7 days/week	36%	35%	42%	26%	47%	35%	37%	34%
5 days/week	29%	23%	23%	31%	31%	26%	46%	27%
4 days/week	10%	12%	10%	11%	8%	11%	5%	9%
3 days/week or less	25%	31%	25%	32%	13%	28%	11%	30%
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**
Mean Days/Week	**4.58**	**4.35**	**4.66**	**4.24**	**5.19**	**4.49**	**5.13**	**4.37**

Opportunity:
Promote cost-effective tickets/monthly passes for frequent cash ticket riders.

Reasons for Riding SamTrans

Lack of access to a car/not driving is the primary reason people choose to ride SamTrans
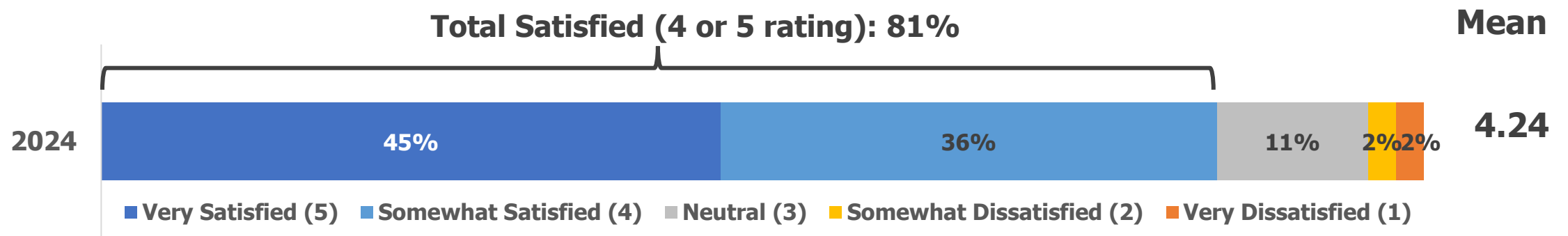
Don't Have A Car/Don't Drive	79%
Save Money (Gas/Wear & Tear On Car)	17%
Help The Environment	11%
Relax or Reduce Stress	11%
Avoid Traffic	8%
Faster Than Other Options	5%
Lack Of/Cost Of Parking	5%

Key Insight:
SamTrans is an essential service for thousands of people throughout the County.

Overall Satisfaction Rating

- Most SamTrans riders (81%) are satisfied with their overall experience
- Satisfaction levels are consistent for short-term and long-term riders

Total Satisfied (4 or 5 rating): 81%

Mean

2024	45%	36%	11%	2%	2%	**4.24**

■ Very Satisfied (5) ■ Somewhat Satisfied (4) ■ Neutral (3) ■ Somewhat Dissatisfied (2) ■ Very Dissatisfied (1)

Opportunity:

Leverage satisfied riders as ambassadors who can help promote service and improve perceptions amongst non-riders and new users.

"Please let us know how well SamTrans is meeting your needs by rating each item below. Circle a number from one to five, where 5=Very Satisfied and 1=Very Dissatisfied. If the question does not apply, circle NA for Not Applicable". "Overall experience with SamTrans?"

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Customer Satisfaction by Service Attribute

Rider satisfaction with all service attributes is improved or unchanged from 2021 ratings except for Communication of Route Changes

Attribute	2024	2021	Change	Statistically Significant
Overall experience with SamTrans	4.24	4.20	+0.04	No
Routes Go Where I Want to Go	4.24	4.16	+0.08	Yes
Helpfulness/Courtesy of Customer Service	4.09	4.09	0.00	n/a
On-Time Performance	4.04	3.85	+0.19	Yes
Communication Of Route Changes	3.85	3.93	-0.08	Yes
Frequency Of Buses	3.83	3.76	+0.07	Yes

Key Insight:

Customers like the Reimagine SamTrans service changes and improvements. We must continue to improve ways to communicate service changes with our customers.

"Please let us know how well SamTrans is meeting your needs by rating each item below. Circle a number from one to five, where 5=Very Satisfied and 1=Very Dissatisfied. If the question does not apply, circle NA for Not Applicable"

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Access to SamTrans Information and Spoken Languages

- Riders are most likely to get trip planning information from digital sources
  - Google Maps (56%), mobile apps (26%), SamTrans website (12%)
- Two in five riders speak a language other than English at home
  - Most common languages: English (59%), Spanish (41%) and Filipino/Tagalog (12%)

Key Insight:
Access to SamTrans content across digital platforms in multiple languages is critical for engagement and effective communication with riders.

Low-Income Ridership Overview

- In the 2024 SamTrans Triennial Survey, the average rider reported a household size of 3.6 and an annual household income of $48,701

- 94% of riders meet the county definition of "low-income," and 68% are considered "extremely low-income" – both up from 2021

- The percentage of SamTrans riders fitting the "low-income" and "extremely low-income" definition increased since the 2021 Triennial Survey

Key Insight:
SamTrans provides mobility services to some of the most economically-disadvantaged communities in the Bay Area.

Income Demographics

94% of riders meet the county definition of "low-income," and 68% are considered "extremely low-income" – both up from 2021

Category	2024	2021
Extremely Low Income (30% AMI)	**68%**	**67%**
Very Low Income (50% AMI)	**15%**	**16%**
Low Income (80% AMI)	**11%**	**8%**
Median Income (100% AMI)	**3%**	**5%**
Moderate Income (120% AMI)	**3%**	**4%**
Total	**100%**	**100%**
SamTrans Total Low-Income Ridership	**94%**	**91%**

California State Income Limits for SMC
Effective 5/9/2024 - Area median Income **$186,600** (based on household of 4)

Income Category	Income Limits by Family Size ($)							
	1	2	3	4	5	6	7	8
Extremely Low (30% AMI) *	41,150	47,000	52,900	58,750	63,450	68,150	72,850	77,550
Very Low (50% AMI) *	68,550	78,350	88,150	97,900	105,750	113,600	121,400	129,250
Low (80% AMI) *	109,700	125,350	141,000	156,650	169,200	181,750	194,250	206,800
Median (100% AMI)	130,600	149,300	167,950	186,600	201,550	216,450	231,400	246,300
Moderate (120% AMI)	156,750	179,100	201,500	223,900	241,800	259,700	277,650	295,550

[Calculated by cross-referencing HH size and HHI and comparing categories to the CA State definitions of "low-income" for San Mateo County for 2021 and 2024. 2024 shown.]

Verbatim Comments Overview

- 738 respondents (23%) provided a comment at the end of the survey

- Riders who provided a verbatim comment were more likely to be dissatisfied with SamTrans (an expected pattern)

- The most common topics raised:

  - General Compliment (29%); Schedules and Frequency (20%); On-Time Performance/Reliability (14%); Personnel (11%); and Routes/Additional Stops (7%)

Key Insight:
Customer comments provide awareness of potential areas for improvement.

Sample Verbatim Compliments:

"THANKS FOR ALWAYS BEING THERE FOR ME."

"I LIKE TO TRAVEL BECAUSE I LIKE THE COMFORT OF SAMTRANS."

"THIS PROGRAM IS BENEFITING MY LIFE IN A VERY POSITIVE WAY."

"IT HELPS ME A LOT BECAUSE I DON'T HAVE A CAR."

"YOUR SERVICE ON THE COASTSIDE HAS CHANGED MY LIFE FOR THE BETTER."

"I LOVE THE MYRIAD OF PLACES I CAN GET TO ON SAMTRANS AND THE ACCURACY OF THE CLIPPER APP."

"FEELS GREATLY IMPROVED FROM A FEW YEARS AGO."

"THANK YOU FOR THE BUS SERVICE SO THAT I AM ABLE TO GO TO SCHOOL DAY BY DAY."

"I AM GRATEFUL. THANK YOU, YOU'RE APPRECIATED."

"SAMTRANS IS SUPER GOOD, WIFI, HEATER AND AIR-CON ALL THERE. THANK YOU."

"SAMTRANS IS MY FAVORITE MODE OF PUBLIC TRANSPORTATION."

Sample Verbatims: Schedules, Frequency, and On-Time Service

"THE ECR IS NEVER ON TIME AND CAUSES ME TO BE LATE TO WORK."

"WISH I COULD GET MORE FREQUENT BUSES ESPECIALLY AT NIGHT."

"MORE ROUTES TO EAST BAY AND BART!"

"LATER TIMES, I WORK LATE."

"KINDLY PROVIDE MORE BUSES FOR 112 "

"SOMETIMES BUS LEAVES EARLIER THAN SCHEDULED."

"I AM VERY HAPPY THAT ECRS ARE ARRIVING MORE FREQUENTLY!"

"MORE BUSES AT NIGHT. BUT THEY DO A GREAT JOB... THANKS!"

"VERY USEFUL AND I ENJOY USING IT, JUST ANNOYING ABOUT THE CONSTANT DELAYS AND LONG WAIT."

"I'D LIKE BUSSES TO COME MORE FREQUENTLY THAN ONCE AN HOUR."

Opportunities and Analysis

Support Low-Income Riders
Expand promotional efforts and access to monthly or discounted fare options for high frequency, single-ride users.

Communicate Route Changes
Assess current communication systems, identify gaps, and implement Customer Relationship Management (CRM) tools to improve communications and engagement.

Route Coverage is a Strength for SamTrans
Leverage the broad coverage of the SamTrans network to attract new riders.

Opportunities and Analysis

Title VI Analysis
Data and analysis conducted for the Triennial Title VI Report.

Effortless Travel, Endless Possibilities Marketing Campaign
Inform current riders, introduce SamTrans to new populations and strengthen brand identity.

Reimagine SamTrans Delivery Evaluation
Support the evaluation of the Reimagine SamTrans project and continue monitoring customer feedback to understand its impact on the rider experience.

Thank You

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Please email jestj@samtrans.com with any questions.