

MEMO

August 11, 2023

To: Shimon Israel, MTC

From: Carol Anne Carroll and Jon Canapary, Corey, Canapary & Galanis

Re: Detailed Sampling Plan 2.0 – MTC Snapshot Survey. **Revised**

This memo serves as the Technical Memorandum encompassing the Detailed Sampling Plan and Schedule for the MTC Snapshot Survey among Bay Area transit passengers which will be conducted from late August 2023 through May 2024.

CC&G was contracted to conduct the MTC Snapshot Survey on behalf of MTC and all participating transit operators. The purpose of the MTC Bay Area Regional Transit Passenger Snapshot Survey is to collect statistically significant information about the passengers and trips for each of the transit operators. This will provide a timely, relevant snapshot of post-pandemic ridership across the region. At least 15,032 completed surveys will be collected.

Methodology/Timing

All surveying will take place from September 2023 through May 2024. CC&G will not survey on holidays and will take a break in surveying in late 2023 around the November/December holidays.

The survey will be conducted as a paper survey with a QR Code for online/mobile participation. Surveyors will primarily board pre-selected transit operators and routes, generally conducting the survey on multiple operators on most shifts. In some cases, surveyors may also approach those waiting at a bus stop or on a train station platform.

Overall Sampling by Transit Operator

In the RFP, MTC suggested possible total numbers by operator, with some proportional breakdowns by transit types (separate targets for rail and bus, for example). The total among all operators was 12,245 completed surveys.

In CC&G's proposal and the resulting contract, it was determined that a higher total among all participating operators was desired, for a total of 15,032. The additional amount was to largely go to operators with higher ridership. In addition, Golden Gate Transit, Altamont Commuter Express (ACE) decided to conduct their own surveys.

With MTC's introduction, CC&G obtained the best possible ridership information from all participating operators. That was used to reformulate a total number per operator, as indicated on the next two pages, with the total for all participating raised to 15,032.

Transit Operator	Average Ridership Weekday	Average Ridership Weekend day	Original RFP	Proposed Target	Target Range
SFMTA (Muni)	398,668	270,744	1,200	1,800	1,700 - 1,900
BART	159,814	73,855	400	1,800	1,700 - 1,900
AC Transit	119,604	69,893	800	1,800	1,700 - 1,900
Santa Clara VTA	51,767	27,741	1,170	1,400	1,300 - 1,500
SamTrans	26,504	13,687	750	1,000	900 - 1,100
Caltrain	14,045	6,366	400	1,000	900 - 1,100
Marin Transit	8,193	5,346	385	500	400 - 600
County Connection	7,523	1,984	385	500	400 - 600
WETA	7,110	4,929	385	500	400 - 600
Petaluma Transit	6,854	1,343	285	500	400 - 600
LAVTA	5,858	1,321	370	500	400 - 600
Santa Rosa CityBus	4,833	1,778	370	500	400 - 600
SolTrans	2,939	902	700	400	350 - 450
WestCat	2,608	361	635	400	350 - 450
Tri Delta Transit (ECCTA)	2,536	1,080	370	400	350 - 450
SMART train	2,361	1,220	350	400	350- 450
Sonoma County Transit	2,260	909	385	400	350 – 450
Napa Valley Transit (NVTA)	1,455	623	350	400	350 – 450
FAST	953	260	635	200	150 - 250
Vacaville Transit	887	313	220	200	150 - 250

Transit Operator	Average Ridership Weekday	Average Ridership Weekend day	Original RFP	Proposed Target	Target Range
Union City Transit	930	280	285	200	150 - 250
Dumbarton Express	706	-	285	200	150 - 250
Rio Vista Transit		-	10	32	up to 50
TOTALS	828,257	484,931	11,125	15,032	

Sampling Criteria for All Operators

CC&G will be providing all transit operators with a brief sampling plan for that system. However, there are some criteria which will apply across the study.

CC&G will sample with particular attention to the following across all operators:

- **Day of week** - Overall, CC&G will target 80% to 90% of responses to be collected on board Monday through Friday (weekday), and 10% to 20% of responses to be collected on board Saturday and Sunday (weekend), with a goal of roughly 85% weekday and 15% weekend. CC&G understands Monday and Friday are often very different days for many operators, so it will strive to avoid oversampling these two days. It will, however, conduct surveying on all five weekdays, and is aware these differences will vary somewhat based on each individual system.
- **Time period** - CC&G will ensure completes from each of three major time periods. (These are based on MTC’s standard time periods, but have been consolidated.) The schedules and frequencies of individual routes with each transit operator will, of course, determine to what degree each time period is covered. Those time periods are:
 - Morning – weekdays before 10 am, with an emphasis on surveying 5 am to 9:59 am
 - Midday – weekdays 10 am to 2:59 pm
 - Evening – weekdays after 3 pm, with an emphasis on surveying 3 pm to 7:30 pm
- **Direction** – CC&G will work to obtain surveys in all directions for each operator.

Note: Given the need to survey across operators, CC&G cannot guarantee every route within a transit operator will be covered in all directions/during all time periods.

Template for Individual Transit Operator Sampling

The template on the following page provides an outline of what individual transit operators can expect for their individualized transit operator sampling.

MTC Snapshot Survey – Agency-Specific Sampling for [Transit Agency Name]

Average weekday sampling: xx,xxx

Average weekend sampling: xx,xxx

[Agency Name] Target and Range: x,xxx (x,xxx – x,xxx)

All transit operators will have the same common sampling characteristics:

- 80% to 85% of surveys will be collected Monday-Friday. CC&G will work to avoid oversampling on Mondays and Fridays owing to their unique characteristics.
- 15% to 20% of surveys will be collected on Saturday/Sunday.
- CC&G will break down surveying into 3 key time periods:
 - Morning – weekdays before 10 am, with an emphasis on surveying 5 am to 9:59 am
 - Midday – weekdays 10 am to 2:59 pm
 - Evening – weekdays after 3 pm, with an emphasis on surveying 3 pm to 7:30 pm

Brief description of unique characteristics of [Transit Agency Name]:

[This will be a brief text-based description of the transit operator’s system, including types of transit – rail, express bus, local bus, etc. – general geography, and other key characteristics.]

This will also include key survey considerations for the fieldwork period (September 2023 – May 2024), such as significant maintenance or other special disruptions to the regular schedule, introduction of new routes, etc.

Additional sampling for [Transit Agency Name]

Additional sampling criteria for this agency. Additional sampling criteria will be proportional to the operator, with fewer additional criteria for lower volume operators. Most sampling here will be high level, reflecting the intention as in the original RFP which showed some additional sampling based on transit type (e.g. rail/bus).