

# Bee-Line System On-Board Survey

## EXECUTIVE SUMMARY

# 2010

AJM Consulting conducted a self-administered on-board survey of all Bee-Line routes between October 16, 2010 and October 23, 2010. A total of 10,040 responses were received, which compares to 9,243 responses collected in a similar survey conducted in 2007. The sampling plan was based on the desired number of responses for each route developed by Westchester County.

The Bee-Line System annual ridership in 2010 was 32.3 million riders, which is a record high. As a comparison, total annual ridership in 2007 was 30.8 million. Therefore, in comparing the 2010 responses with the 2007 survey results, it is important to understand that the changes in the three year period reflect proportionate ridership changes in a growing market.

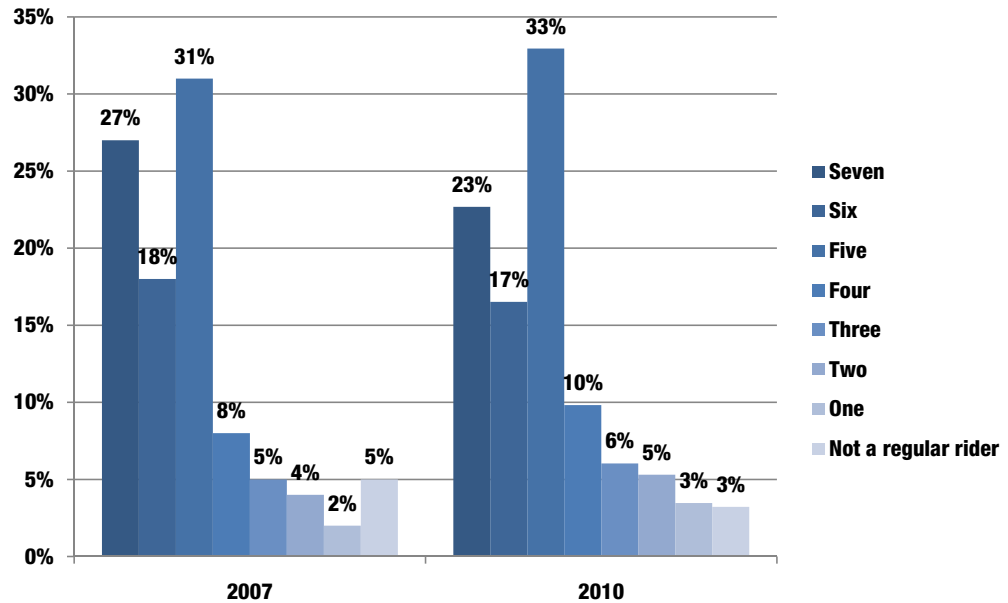
## SUMMARY

- Customers are generally satisfied with Bee-Line service. In addition, customer satisfaction among Bee-Line riders is moving in the right direction, with survey respondents giving the Bee-Line higher marks (compared to 2007) in every category of service quality.
- Bee-Lines riders are largely transit dependent. 62 percent of riders do not have a motor vehicle available to them. Statistically, this is virtually equivalent to the 2007 numbers.
- Bee-Line ridership continues to be diverse. Most riders identified themselves as Hispanic (34 percent) or Black (38 percent).
- The income distribution of riders has changed significantly since 2007. Thirty-two percent (up from 23 percent in 2007) of riders earn less than \$10,000 annually. The number of persons earning between \$10,000 and \$25,000 has dropped from 31 percent in 2007 to 15 percent in 2010. This is likely due to the impacts of the current economic downturn.
- The Bee-Line's ridership is aging. The average age of passengers is now 37 - compared to 34 in 2007. The percentage of riders over 50 years of age has increased by 4 points.
- The proportion of new riders on Bee-Line has decreased. In 2010, 15 percent of riders had been riding less than one year, a drop of 2 percentage points from 2007.
- Work trips were the predominant trip purpose, with 67 percent of respondents travelling to or from work. This is an increase from 2007's figure of 63 percent.
- MetroCard usage has continued to increase. Sixty-four percent of riders now use MetroCard on a regular basis. This has increased by 3 percent since 2007. Cash usage decreased by 3 percent during this same time period.
- Yonkers continues to be the largest location of trip origins and destinations. The number of origins and destinations to New York City has remained identical to 2007.
- More than two-thirds of riders have access to the internet, up from 63 percent in 2007. Internet usage increased in all income categories compared to 2007.

## BASIC PASSENGER CHARACTERISTICS

### *Frequency of Riding Bee-Line Buses*

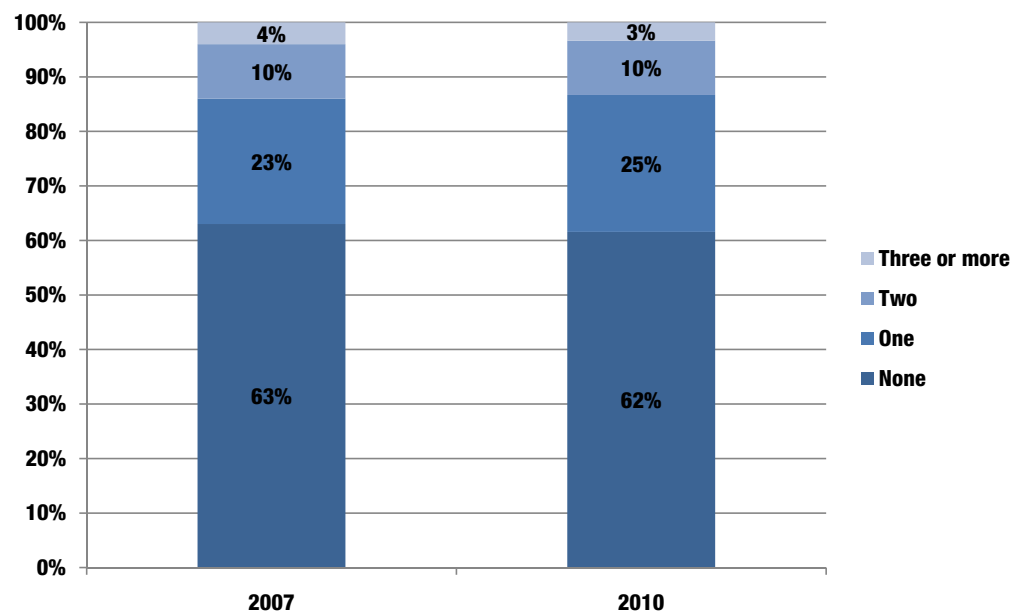
73 percent of riders used Bee-Line services five days a week or more. This is a slight drop from 2007. The reduction in the proportion of persons using the system seven days a week was the key cause of this drop. One third of passengers use Bee-Line service five days a week (a typical work-commute). This increased from 31% of riders in 2007, reinforcing the Bee-Line System's role in providing access to employment. In 2010, only 3% of survey respondents identified themselves as "Not Regular Riders" – down from 5% in 2007. This indicates a proportionate drop in those who only ride on an occasional basis or are riding the bus for the first time.



(Source: Question #1. In a typical week, how many days do you usually use the Bee-Line System?)

### *Auto Ownership*

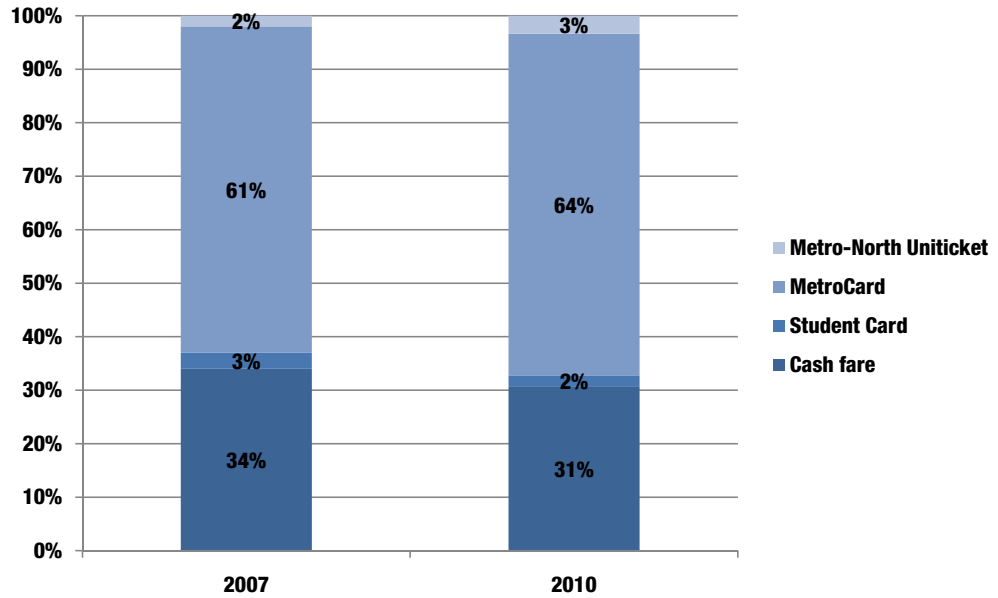
For a variety of reasons ranging from physical disability, to economic means, to lifestyle choice, many Westchester County residents live car-free. According to the 2000 Census, 15% of Westchester County households do not have any automobiles available for their use, while 36% have only one automobile in the household. By comparison, 62% of Bee-Line users reported in 2010 that they have no access to a motor vehicle, and an additional 25% have access to just one vehicle.



(Source: Question #26. How many cars or other motor vehicles are available for you to use?)

## How the Fare was Paid

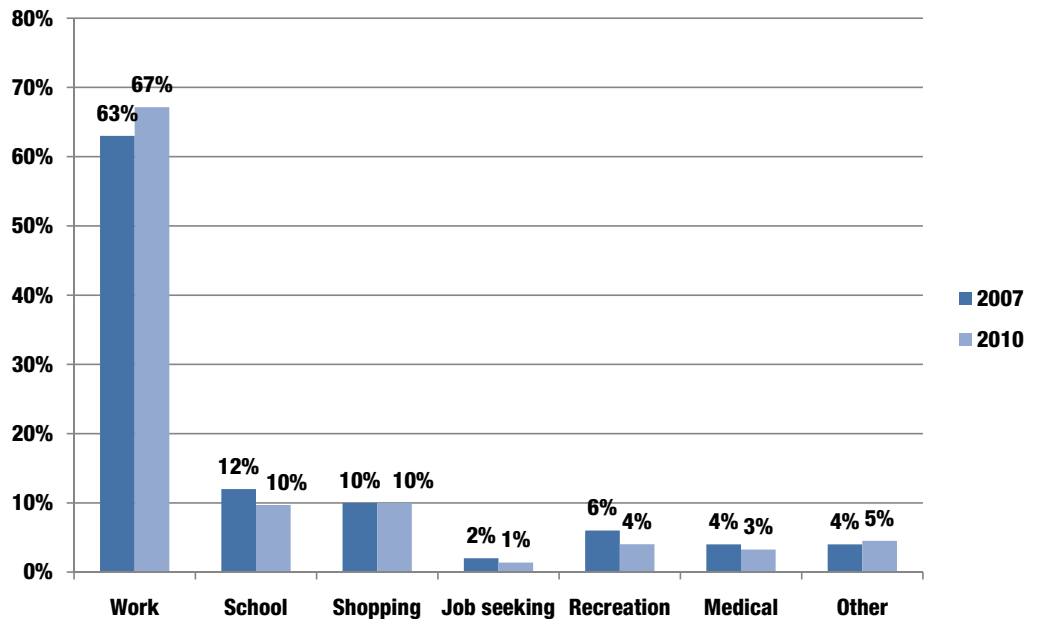
MetroCard utilization continues to increase, while the use of cash has dropped correspondingly. Between 2007 and 2010, MetroCard usage increased by 3 percent. This is a positive trend, as MetroCard improves cash flow, speeds passenger boardings, and better integrates Bee-Line services into the regional network.



(Source: Question #5. How did you pay your bus fare?)

## Trip Purpose

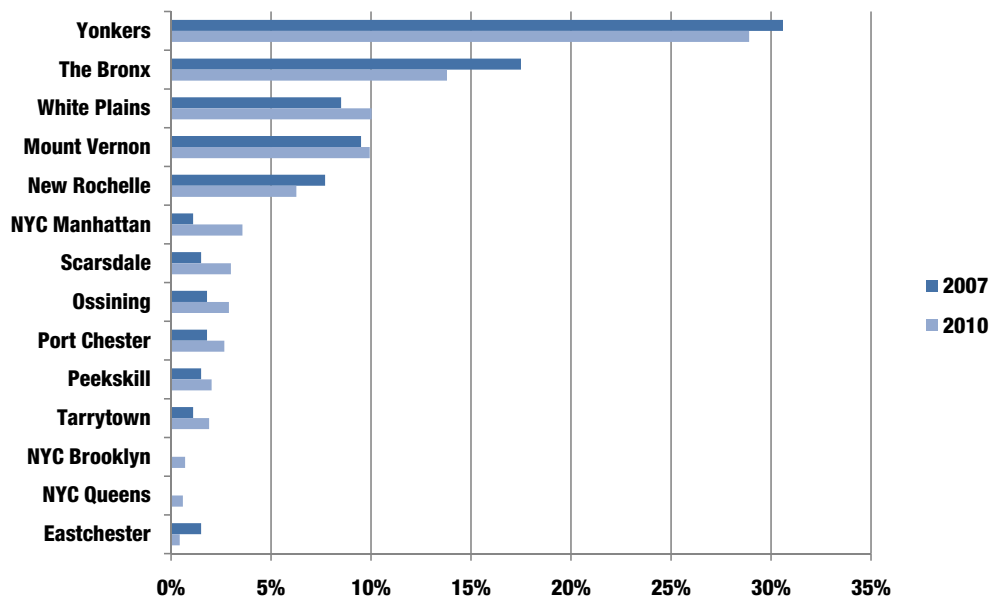
Non-work trips made up a smaller component of total Bee-Line trips in 2010 than in 2007, as more respondents reported that “Work” was the main purpose of the trip they were taking. In other words, more than anything else, the Bee-Line’s role in Westchester County can be described as facilitating employment.



(Source: Question #3. What is the main purpose of your bus trip today?)

## Point of Origin of Entire Trip

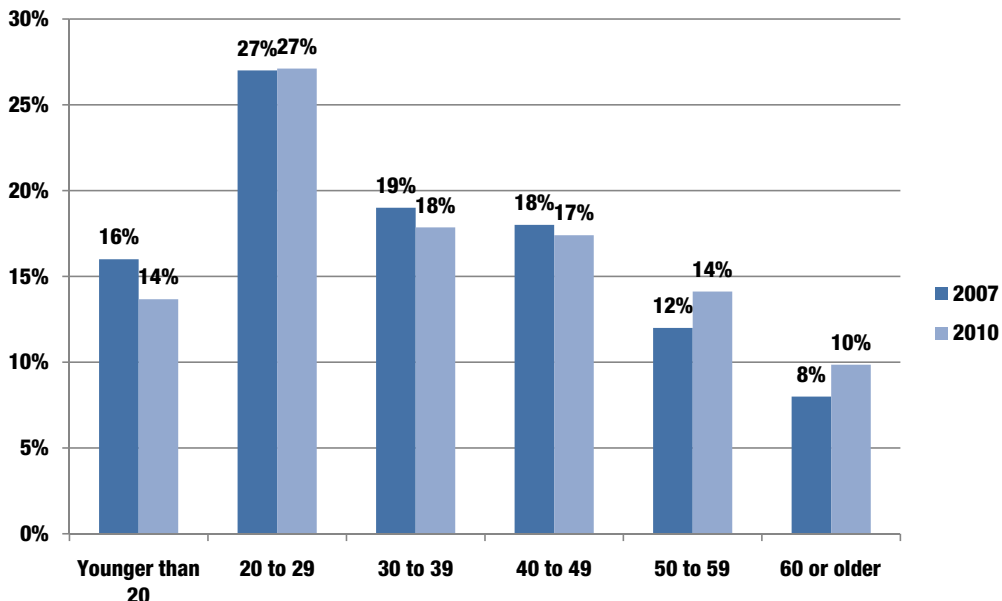
Yonkers was the top origin and destination of Bee-Line trips in 2010 at 29% and 26% of responses, respectively. The combined boroughs of New York City made up 19% of trip origins and 18% of destinations. Other significant trip generators include White Plains (10% of origins, 14% of destinations), Mt. Vernon (10% of origins, 7% of destinations), and New Rochelle (6% of origins, 6% of destinations). One difference between survey respondents' answers in 2007 and 2010 was the shift away from the Bronx and toward "Other Boroughs" as the choice for where they began or ended their trip. However, the overall percentage of respondents heading to or from New York City (5 boroughs combined) remained relatively the same between 2007 and 2010.



(Source: Question #31. In what Municipality and ZIP code did you begin this entire trip?)

## Age

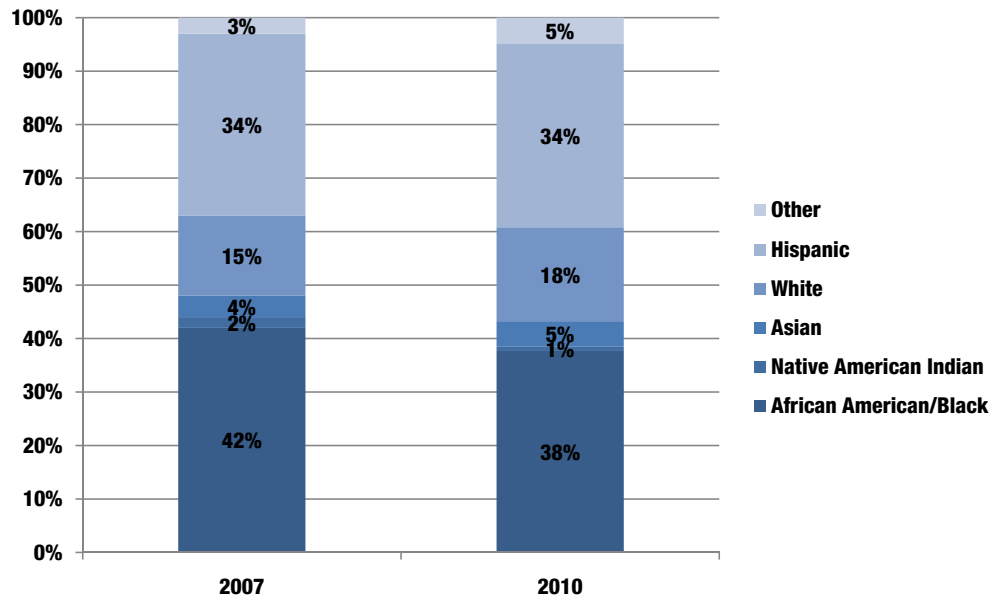
The average age of Bee-Line users is 37 years old. This is 3 years older than the average age of 34 reported three years ago. As in 2007, the largest segment of Bee-Line users is in the 20-29 year-old range, but the median age is now 34 compared to 30 in 2007. The percentage of riders over 50 increased by 4 percentage points since 2007.



(Source: Question #27. How old are you?)

## Ethnic/Racial Self-Identification

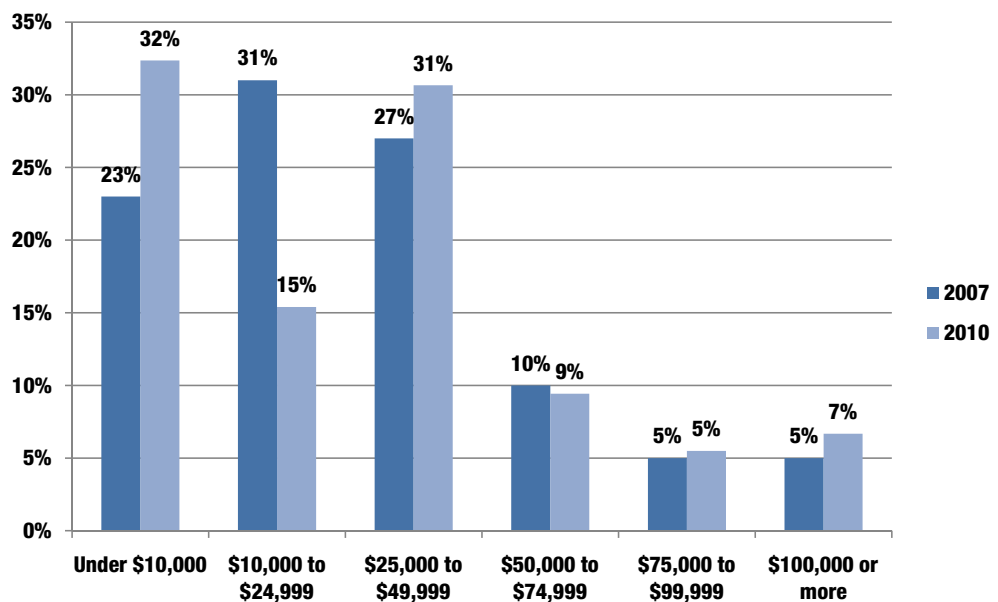
Hispanic and African-American riders make up more than two thirds of Bee-Line ridership. The past three years have seen some slight, but not insignificant, shifts in distribution of ethnic and racial groups among Bee-Line riders. The percentage of Hispanic riders held steady at 34%, while Whites and Asians increased to 18% and 5% respectively. Passengers identifying themselves as Native American dropped and the percentage of African American passengers declined by 4 percentage points to 38% of all riders. By comparison, the US Census Bureau's 2009 American Community Survey (ACS) estimates that the overall make-up of Westchester County is 69.4% White, 19.8% Hispanic, 14% Black, 5.8% Asian, and .1% Native American (Hispanic is not mutually-exclusive with any race in ACS).



(Source: Question #29. Which do you consider yourself?)

## Household Income

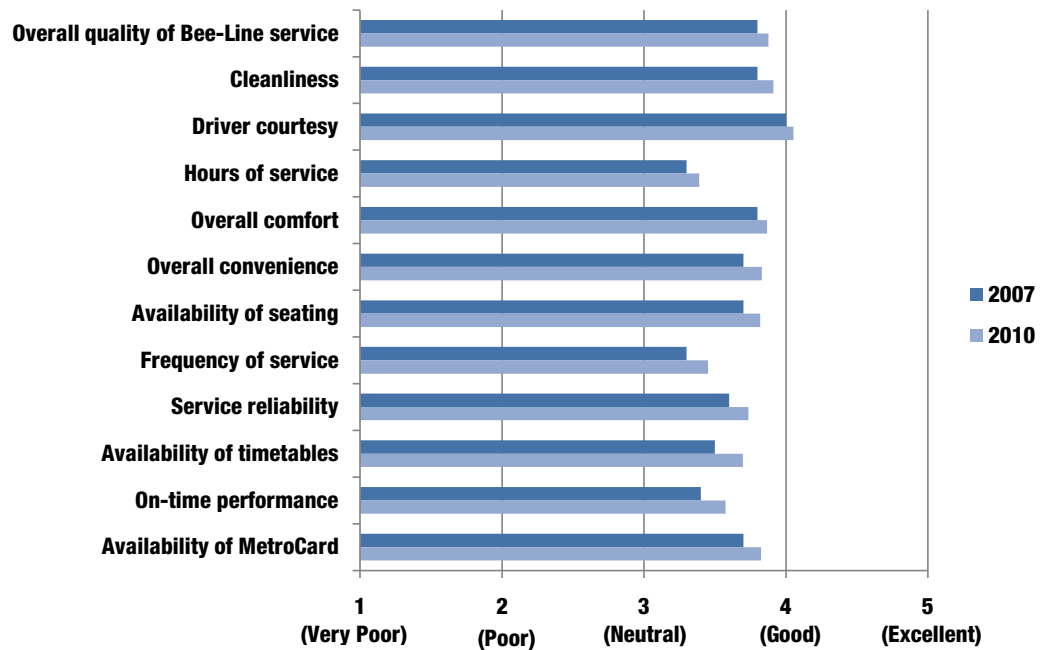
The most frequently reported annual household income range among Bee-Line users in 2007 was \$10,000 to \$24,999. In 2010, more people reported an annual household income of under \$10,000 than any other income range. The three-year period between the two surveys coincided with a major economic recession, during which unemployment rates for the County jumped from 3.3% in December 2006 to 7.8% in February 2010. It is likely that these difficult economic conditions are reflected in the responses of Bee-Line passengers.



(Source: Question #30. What is your total annual household income?)

## Bee-Line Service Ratings

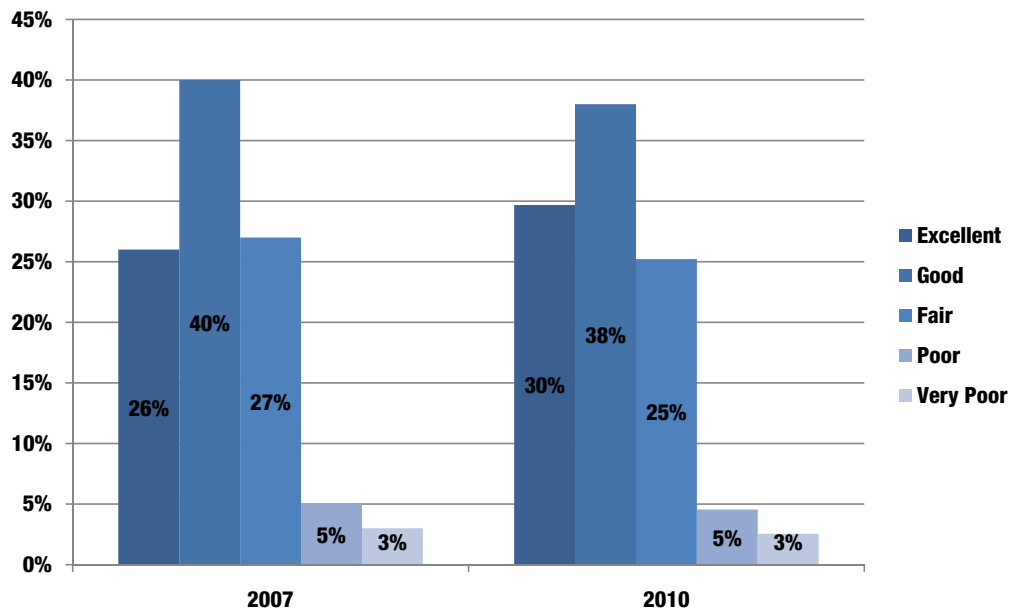
Survey respondents gave the Bee-Line higher marks in every single category of service quality, as compared to 2007. The scores in this figure are a numerical representation of a qualitative scale from “Very Poor” (1) to “Excellent” (5). The average “score” for each service quality characteristic is determined by the percentage of respondents that selected each qualitative ranking (1 to 5) for that characteristic (i.e. 10% chose “Excellent,” 20% chose “Good” etc.).



(Source: Question #9-20)

## Overall Service Ratings

By most measures, customer satisfaction among Bee-Line riders is moving in the right direction. In 2010, 68% of respondents chose “Good” or “Excellent” to describe the overall quality of Bee-Line service, compared to 66% in 2007.



(Source: Question #9. Please rate Bee-Line service for overall quality of Bee-Line service.)

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