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To: San Francisco MUNI
From: David Binder Research
Date: July 20th, 2004
Re: Executive Summary: MUNI Ridership Survey

Results from a survey of San Francisco residents age 18 or older who had ridden MUNI within the last six months, conducted June 27th-June 30th, 2004, show that the public continues to highly regard MUNI service and performance.

This recent survey used the same methodology as previous surveys conducted in June 2001, July 2002 and July 2003. However, there were questions added and questions omitted in the 2004 survey instrument. Each of these surveys interviewed 400 MUNI riders living in San Francisco. Interviews were conducted in English, Spanish and Cantonese.

Specific conclusions from this survey are outlined in this document.

MUNI SERVICE AND PERFORMANCE

1. Approval ratings of MUNI's service remain high.

- Approval of MUNI's service remains high, with 64% of those surveyed rating MUNI's service as excellent or good. Overall, MUNI continues to show a trend toward excellent service.

Overall, how would you rate MUNI's service?				
	2001	2002	2003	2004
Excellent	5%	7%	12%	10%
Good	43	50	56	54
Fair	35	33	26	31
Poor	11	6	3	4
Very poor	5	2	2	NA
Excellent/Good	48	57	68	64
Poor/Very Poor	16	8	5	4

2. The condition of MUNI's vehicles buses and streetcars are perceived favorably.

- MUNI riders give positive ratings to the condition of MUNI vehicles. 64% of riders feel MUNI's vehicles are excellent or good and only 5% rate MUNI's vehicles poorly. This rating reinforces the 2003 data, when 66% of MUNI riders rated the condition of MUNI vehicles as excellent or good.

Overall, how would you rate the condition of MUNI's vehicles, such as buses and streetcars?				
	2001	2002	2003	2004
Excellent	3%	5%	6%	8%
Good	41	48	60	56
Fair	39	36	25	31
Poor	13	8	6	5
Very Poor	3	2	2	NA
Excellent/Good	44	53	66	64
Poor/Very Poor	16	10	8	5

3. More frequent service & more accurate schedules continue to be top concerns for MUNI passengers.

- As in 2001, 2002, and 2003 survey participants rated more frequent service and more accurate schedules among the aspects of MUNI they would like to see improved. 35% of riders state they would like more frequent MUNI service, as did 31% in 2003. 30% would like more accurate schedules, compared to 17% in 2003.
- Cantonese-speaking respondents were especially likely to say they would like to see MUNI service and schedules improved, with 55% wanting more frequent service and 68% wanting more accurate schedules.
- Overall, other suggested improvements include: vehicle cleanliness (15%), service reliability (13%) and more convenient routes (10%). In addition, 15% of riders said they would like to see employee helpfulness improved, compared to 7% in 2003.

What aspects of MUNI would you most like to see improved?	
More frequent service	35%
More accurate schedules	30
Vehicle cleanliness	15
Employee helpfulness	15
Service reliability	13
More convenient routes	10
Better operator safety	8
Better safety from crime	7
Better response time to complaints	4
More disabled-accessible lines	2

4. 69% of riders have not noticed a significant change in MUNI service during the last six months, while 16% have noticed an improvement.

- 16% of riders feel that MUNI service has improved in the last six months, compared to 7% who say it has worsened. The majority, 69%, say service has stayed about the same. In 2003, 21% of riders felt that MUNI service had improved, while 66% felt it had stayed about the same.

5. Riders give favorable ratings to MUNI's performance in providing accessibility for persons with disabilities, operating vehicles safely and ensuring safety and security for MUNI riders.

- When riders were asked to rate MUNI's performance in various areas, accessibility for persons with disabilities received the highest rating, with 69% of

MUNI riders saying MUNI performs an excellent or good job. In 2003, when asked how important accessibility for disabled persons was to their MUNI experience, 53% of riders said accessibility was important.

- MUNI’s performance in the area of safety is also regarded positively by riders. 67% of riders rate MUNI as excellent or good in regards to the safe operation of vehicles and 59% say MUNI does an excellent or good job in ensuring that riders feel safe and secure from crime while on a MUNI vehicle. In 2001, 2002 and 2003, a high proportion of riders placed high importance on the safe operation of vehicles. In 2003, 77% of riders said the safe operation of vehicles was very important and 69% said “feeling safe and secure from crime while on a MUNI vehicle” was very important to their MUNI experience.
- Riders also give excellent or good performance ratings to MUNI in the following areas; vehicle comfort (57%), service reliability (54%), and operator helpfulness (54%).

MUNI Performance		
Feature	Excellent / Good	Fair / Poor
Accessibility for persons with disabilities	69	18
Safe operation of vehicles	67	31
Feeling safe and secure from crime while on a MUNI vehicle	59	38
Vehicle comfort	57	43
Service reliability	54	45
Operator helpfulness	54	43
Vehicle cleanliness	49	50
Service frequency	46	53
Communication with riders	40	52

MUNI COMMUNICATIONS & WEBSITE

1. On-board printed signs and brochures and the newspaper are the most useful method of communication with MUNI riders

- On-board printed signs and brochures are cited most frequently as the most useful forms of communication to inform riders of changes in MUNI's schedule and service. 78% of riders say they are useful forms of communication, including 45% of riders who say they are extremely useful.
- 52% of riders say the newspaper is a useful way of communicating with riders, while 49% cite the radio.
- 41% of riders say the MUNI web site is a useful form of communication. 45% of English speakers say the MUNI web site is useful, compared to 10% of Cantonese speakers. 46% of men find the MUNI web site useful, compared to 37% of women.

2. Potential features for sfmuni.com

- Maps of individual bus routes and bus schedules are the most important to MUNI riders. 61% of riders say maps of individual bus routes would be extremely important to have on the website. 59% say bus schedules would also be extremely important.
- Features MUNI riders found least important include; Information about MUNI administration including reports and awards, MUNI press releases, and information about MUNI vehicles.
- Outlined in the table below are potential features for MUNI's web site that voters cited as the most important.

MOST IMPORTANT FEATURES FOR SFMUNI.COM	
Feature	% Important
Maps of individual bus routes	77
Bus schedules	75
General fare and rider information	73
Maps of the entire MUNI system	72
Service change announcements	70
Route selection guide to indicate suggested routes	69
Vehicle arrival predictions to indicate when a particular vehicle is coming	67
On-line feedback	57
Trip-planner	55
Information about MUNI construction projects	53
Site search	52
Information about MUNI vehicles	42
MUNI press releases	37
Information about MUNI administration including reports and awards	29

3. Use of sfmuni.com

- One-quarter of MUNI riders say they check the website frequently or occasionally. The features these riders check most often include; schedules (42%), maps of individual routes (34%), and the trip planner (28%). Riders are less likely to check maps of the MUNI system or vehicle arrival predictions
- A majority (59%) of MUNI riders say they never check the MUNI website just before riding. Furthermore, 87% of Cantonese speakers say they never check the MUNI website, compared to 55% of English speakers. 65% of women say they never check the MUNI website, compared to 53% of men.

4. Changes to sfmuni.com

- When respondents who have visited MUNI's website were asked what they would like to see changed, the most frequent responses included more accurate trip planners and schedules. 11% of respondents said they would change "nothing."