



David Binder Research

44 Page Street, Suite 404 • San Francisco, California 94102
800-905-7330 • 415-621-7655 • F: 415-621-7663 • db-research.com

To: San Francisco MUNI
From: David Binder Research
Date: August 22nd, 2005
Re: Executive Summary—2005 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 14th – 16th, 2005.

This recent survey used the same methodology as previous surveys conducted in June 2001, July 2002, July 2003, and June 2004. 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 65% of those surveyed rating MUNI's service as excellent or good. MUNI's trend of providing excellent service continues.

Overall, how would you rate MUNI's service?					
	2001	2002	2003	2004	2005
Excellent	5%	7%	12%	10%	9%
Good	43	50	56	54	56
Fair	35	33	26	31	28
Poor	11	6	3	4	6
Very poor	5	2	2	NA	NA
Excellent/Good	48	57	68	64	65
Fair / Poor	--	--	--	35	34

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

- MUNI riders continue to 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, a noticeable increase from previous years.

Overall, how would you rate the condition of MUNI's vehicles, such as buses and streetcars?					
	2001	2002	2003	2004	2005
Excellent	3%	5%	6%	8%	8
Good	41	48	60	56	56
Fair	39	36	25	31	28
Poor	13	8	6	5	5
Very Poor	3	2	2	NA	NA
Excellent/Good	44	53	66	64	64
Fair / Poor	--	--	--	36	33

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

- As in previous years, 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. 24% would like more accurate schedules, compared to 30% in 2003.
- Cantonese-speaking respondents were especially likely to say they would like to see MUNI service and schedules improved, with 67% wanting more frequent service and 50% wanting more accurate schedules.
- Overall, other suggested improvements include: vehicle cleanliness (14%), service reliability (8%) and employee helpfulness (7%). In addition, 5% of riders said they would like more convenient routes, compared to 10% in 2004.

What aspects of MUNI would you most like to see improved?		
	2004	2005
More frequent service	35%	35%
More accurate schedules	30	24
Vehicle cleanliness	15	14
Service reliability	13	8
Employee helpfulness	15	7
More convenient routes	10	5
Better operator safety	8	6
Better safety from crime	7	4
Vehicle arrival predictions	NA	2
Better response time to complaints	4	1
More disabled-accessible lines	2	1

4. Nearly three-fourths (72%) of riders felt that service had remained consistent over the last six months, while 12% have noticed an improvement in MUNI service.

- 12% of riders feel that MUNI service has improved in the last six months, compared to 9% who say it has worsened. The majority, 72%, say service has stayed about the same. In 2004, 16% of riders field that MUNI service had improved, while 69% felt that it had stayed about the same.
- 43% of Cantonese-speaking respondents noted an improvement in MUNI service, with 50% who feel it has remained the same.

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

- When riders were asked to rate MUNI's performance in various areas, safe operation of vehicles received the highest rating, with 74% of MUNI riders saying MUNI performs an excellent or good job , compared to 67% in 2004.
- Riders also favorably rate MUNI's accessibility for persons with disabilities, with 71% of riders saying MUNI performs an excellent or good job, a slight increase from 2004 (69%).
- 60% of MUNI riders favorably regarded operator helpfulness, compared to 54% in 2004.
- Riders also give excellent or good performance ratings to MUNI in the following areas; ensuring safety and security for MUNI riders (60%), vehicle comfort (58%), and service reliability (54%).

MUNI Performance				
Feature	2004		2005	
	Excellent / Good	Fair / Poor	Excellent / Good	Fair / Poor
Safe operation of vehicles	67	31	74	24
Accessibility for persons with disabilities	69	18	71	14
Operator helpfulness	54	43	60	34
Feeling safe and secure from crime while on a MUNI vehicle	59	38	60	37
Vehicle comfort	57	43	58	41
Service reliability	54	45	54	44
Communication with riders	40	52	49	42
Vehicle cleanliness	49	50	48	51
Service frequency	46	53	46	52
Vehicle arrival predictions to indicate when a particular vehicle is coming	--	--	42	42

MUNI COMMUNICATIONS & WEBSITE

1. On-board printed signs and brochures continues to be 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. 75% of riders say they are useful forms of communication, including 39% of riders who say they are "extremely useful."
- 48% of riders say that television is a useful way of communicating with riders, while 43% cite the newspaper and 42% say radio is a useful method of communication.
- 47% of riders say the MUNI web site is a useful form of communication, an increase from 2004 when 41% mentioned MUNI's website.

MUNI Communication				
Method	2004		2005	
	Useful	Less Useful	Useful	Less Useful
On-board printed signs and brochures	78	19	75	20
TV	56	39	48	43
MUNI Website, sfmuni.com	41	42	47	26
Newspaper	52	41	43	46
Radio	49	45	42	46
511.org	21	35	27	27

2. Potential features for sfmuni.com

- Maps of individual bus routes and bus schedules are the most important to MUNI riders. 65% of riders say bus schedules would be “extremely” useful to have on the website. 64% say maps of individual bus routes would also be “extremely” important.
- Maps of the entire MUNI system and service change announcements were viewed to be important features of MUNI's website by 77% of riders.
- 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	
	2004	2005
Maps of individual bus routes	77	79
Bus schedules	75	78
Maps of the entire MUNI system	72	77
Service change announcements	70	77
General fare and rider information	73	74
Trip-planner	55	74
Vehicle arrival predictions to indicate when a particular vehicle is coming	67	72
On-line feedback	57	60
Site search	52	60
Information about MUNI construction projects	53	59
Information about MUNI vehicles	42	48
MUNI press releases	37	43
Information about MUNI administration including reports and awards	29	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 (38%), maps of individual routes (38%), and the trip planner (27%). Riders are less likely to check maps of the MUNI system or vehicle arrival predictions
- A majority (59%) of MUNI riders say they have never checked the MUNI website prior to riding.