RIDERSHIP SURVEY 2018

Conducted for the San Francisco Municipal Transportation Agency

KEY FINDINGS

June to August 2018

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San Francisco, California

SURVEY DETAILS

TECHNIQUE Telephone interviewing

FIELD DATES Field work conducted in July through August 2018

INTERVIEWS 609 completed interviews

SAMPLE FRAME Current adult residents of San Francisco who have used Muni in the past 6 months. A hybrid cell phone/RDD sample was utilized to contact county residents. Interviews were conducted in English, Spanish, and Chinese.

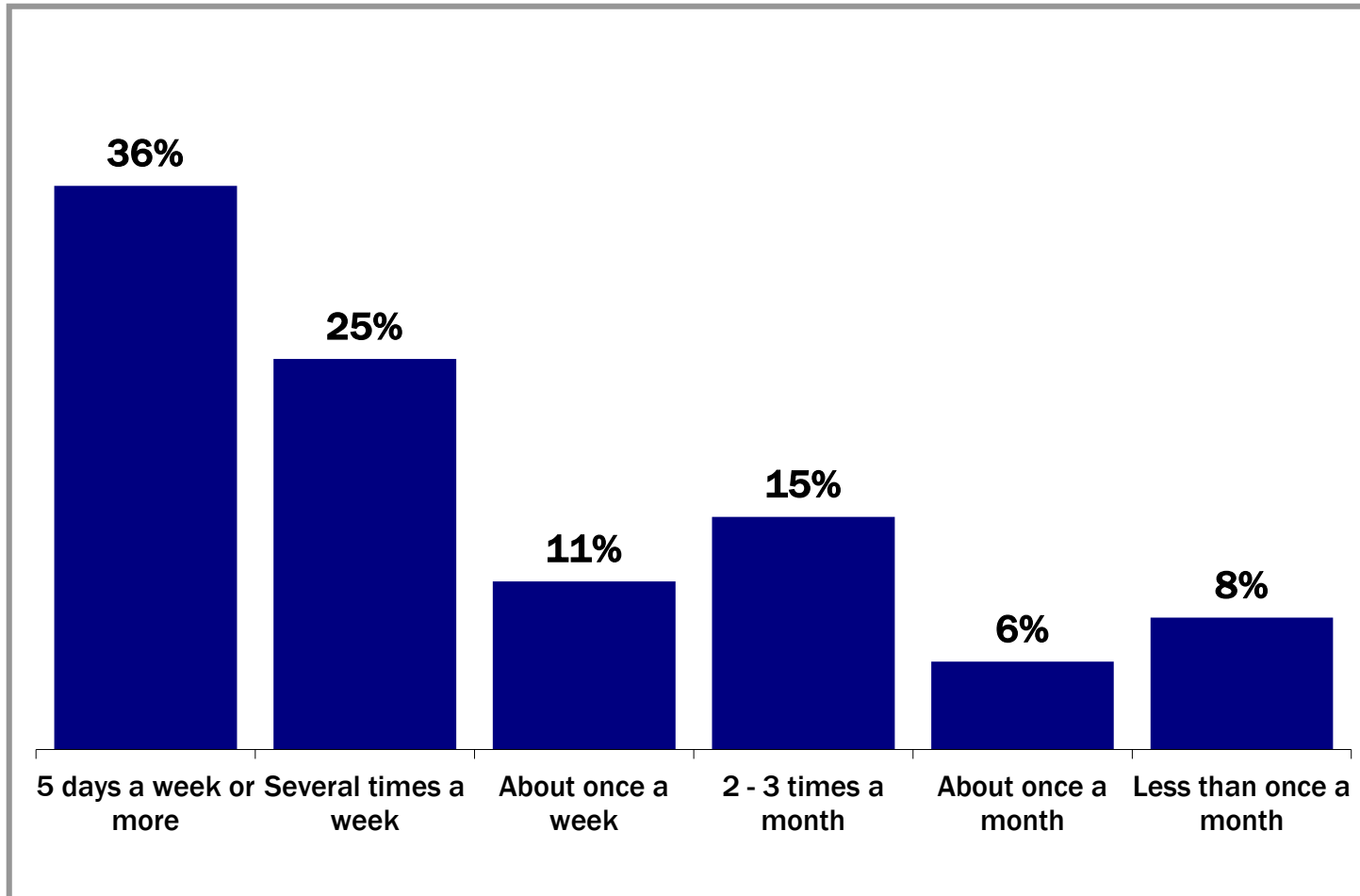**MARGIN OF ERROR (at 95% confidence level)** +/- 3.9% for total sample   (n=609)

NOTES Responses are rounded and may not add up 100%.

Also conducted a one-question survey among an additional 436 non-riders as part of this effort.

USAGE OF MUNI

FREQUENCY OF RIDING MUNI

How often do you ride MUNI?

Base: 2018 Total (n=609)

PURPOSE OF RIDING MUNI

When you use MUNI, what is the main purpose of the trips you make?

Purpose	Percentage
Commute to work	43%
Personal Appointments	16%
Recreation/Entertainment/Restaurant	15%
Shopping	8%
Medical	6%
Visit Friends/Family	5%
School/University	3%
Work-Related Business	3%

Base: 2018 Total (n=609)
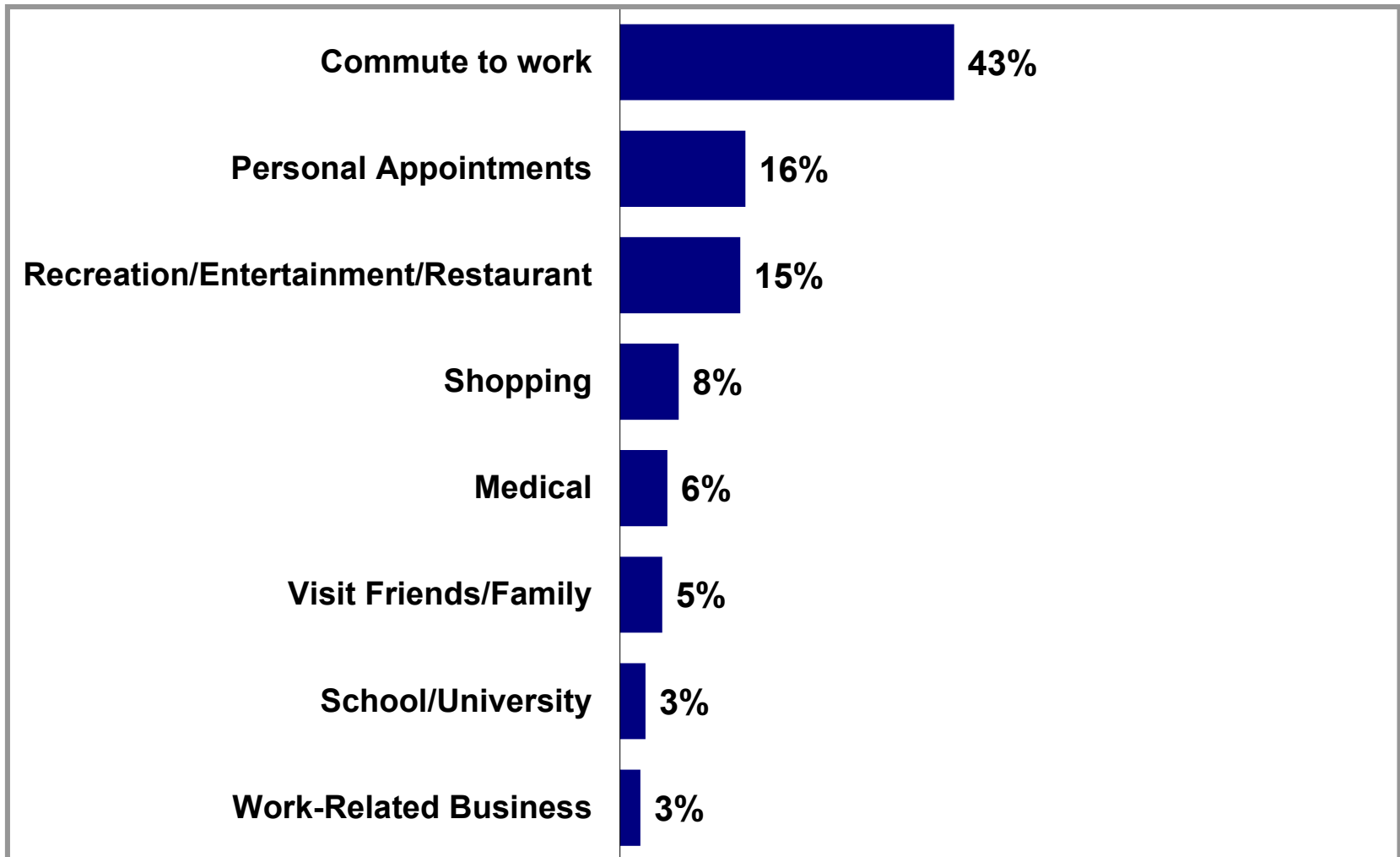
FARE PAYMENT

How do you usually pay your MUNI fare?

Base: 2018 Total (n=609)
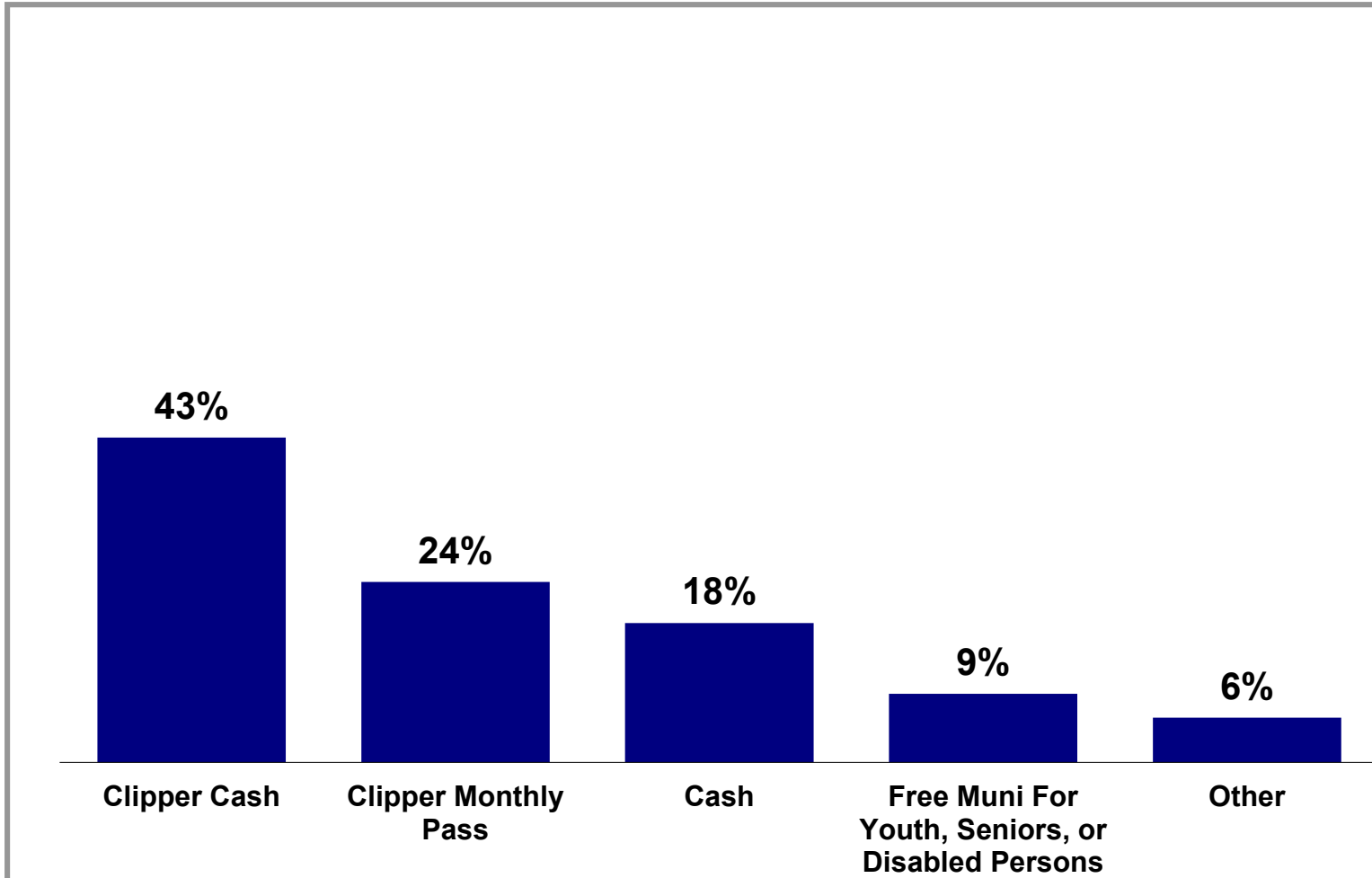
WHY CASH

What is the primary reason that you use cash?

Reason	Percentage
Prefer to pay as I ride	59%
Don't use Muni enough for it to be worthwhile	12%
Cash transfer is a better value	9%
Don't like carrying a Clipper Card/Worried about privacy	8%
Don't have access to get/load a Clipper Card	7%
Other	5%
Don't know	1%
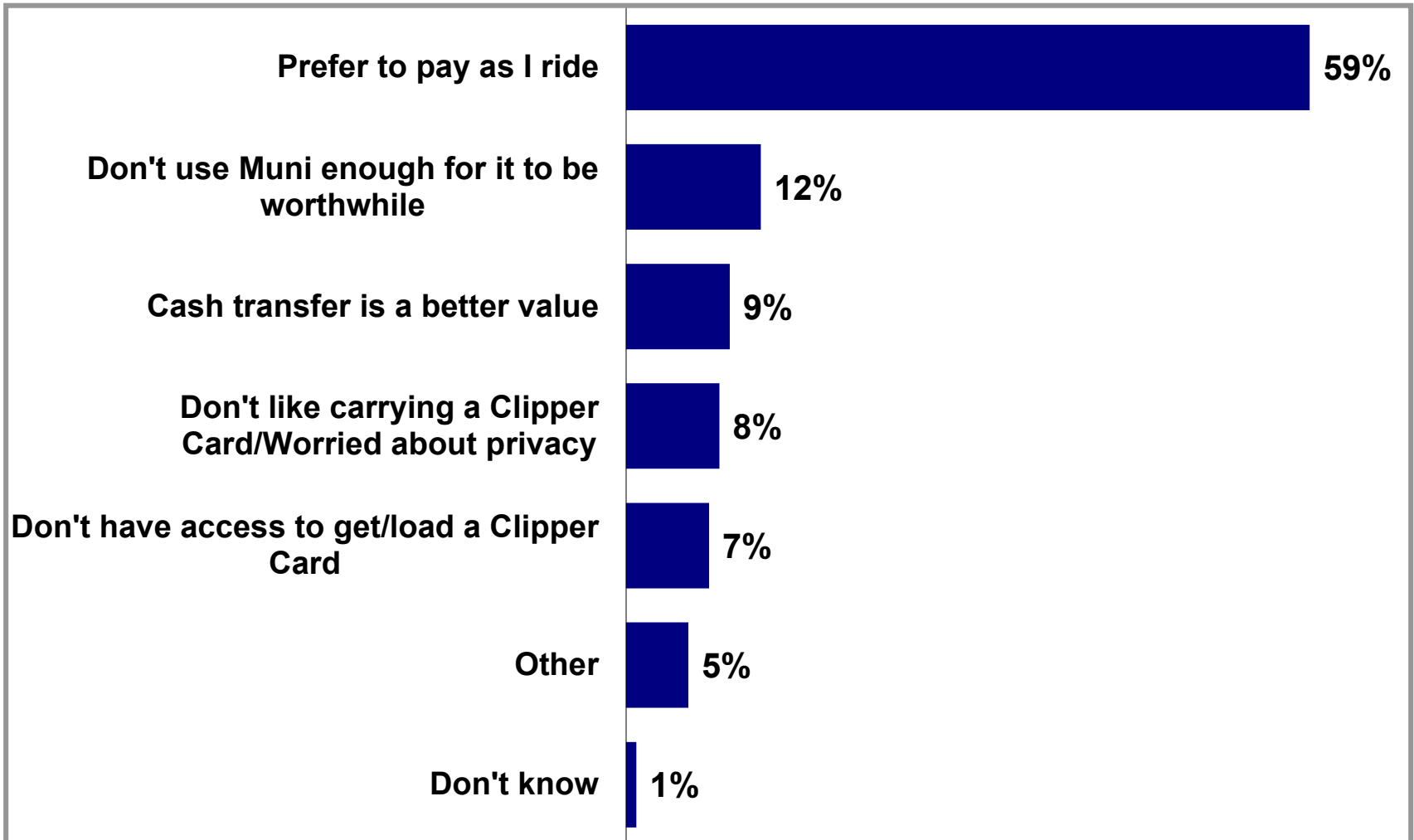
WALK LONGER DISTANCE TO STOP

Would you consider walking a longer distance to your Muni stop if you knew it would reduce your overall travel time?

All Riders **Disabled Riders**

Yes	No	Don't walk to my stop / Don't know
61%	35%	4%
34%	63%	3%

Base: 2018 Total (n=609). Disabled Riders (n = 71)
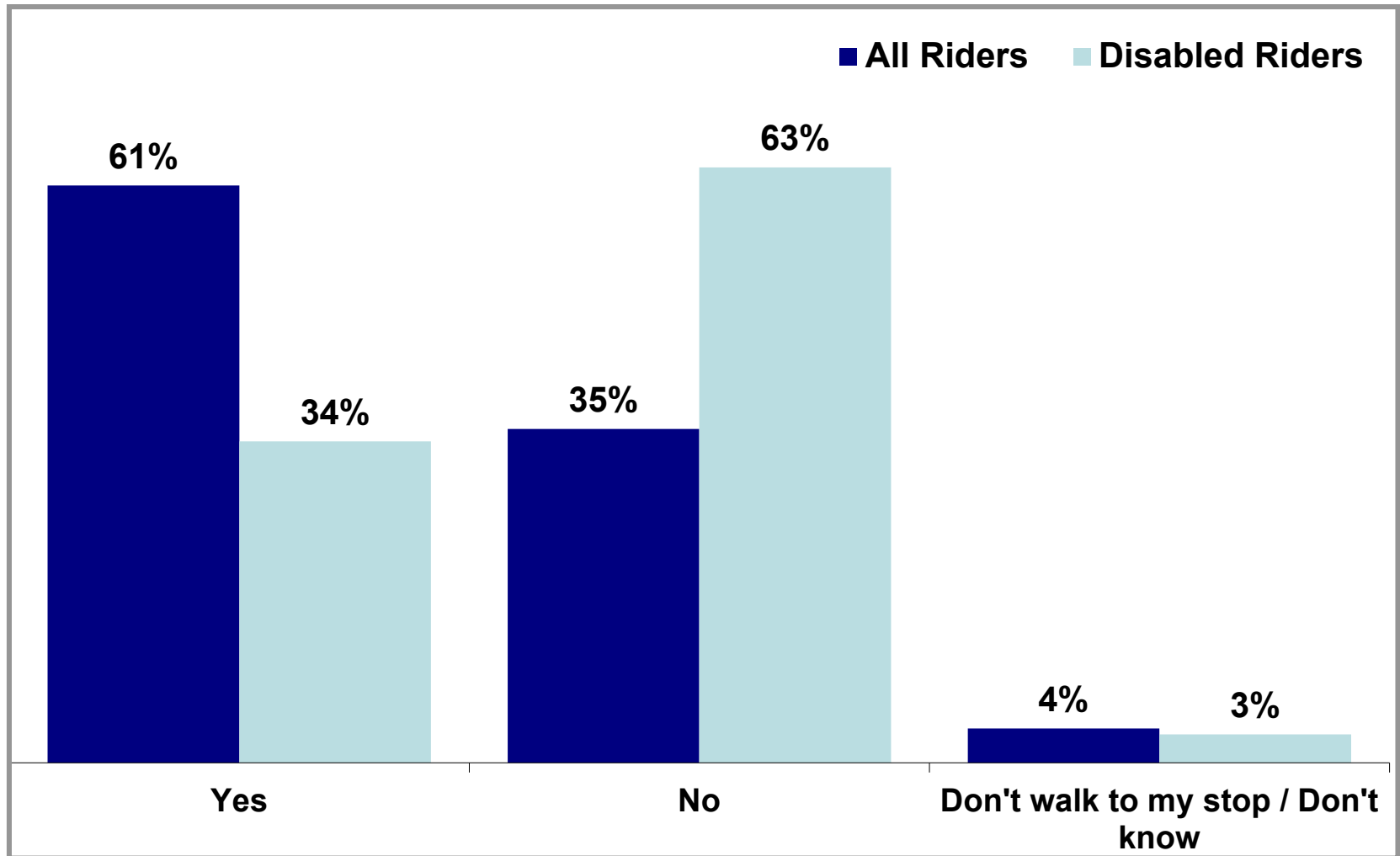
SATISFACTION RATINGS

OVERALL RATING OF MUNI SERVICE (2018)

Overall, how would you rate MUNI's service? Would you say...

Base: 2018 Total (n=609)

OVERALL RATING OF MUNI SERVICE – THREE YEAR COMPARISON

Overall, how would you rate MUNI's service? Would you say...

Base: 2018 Total (n=609)
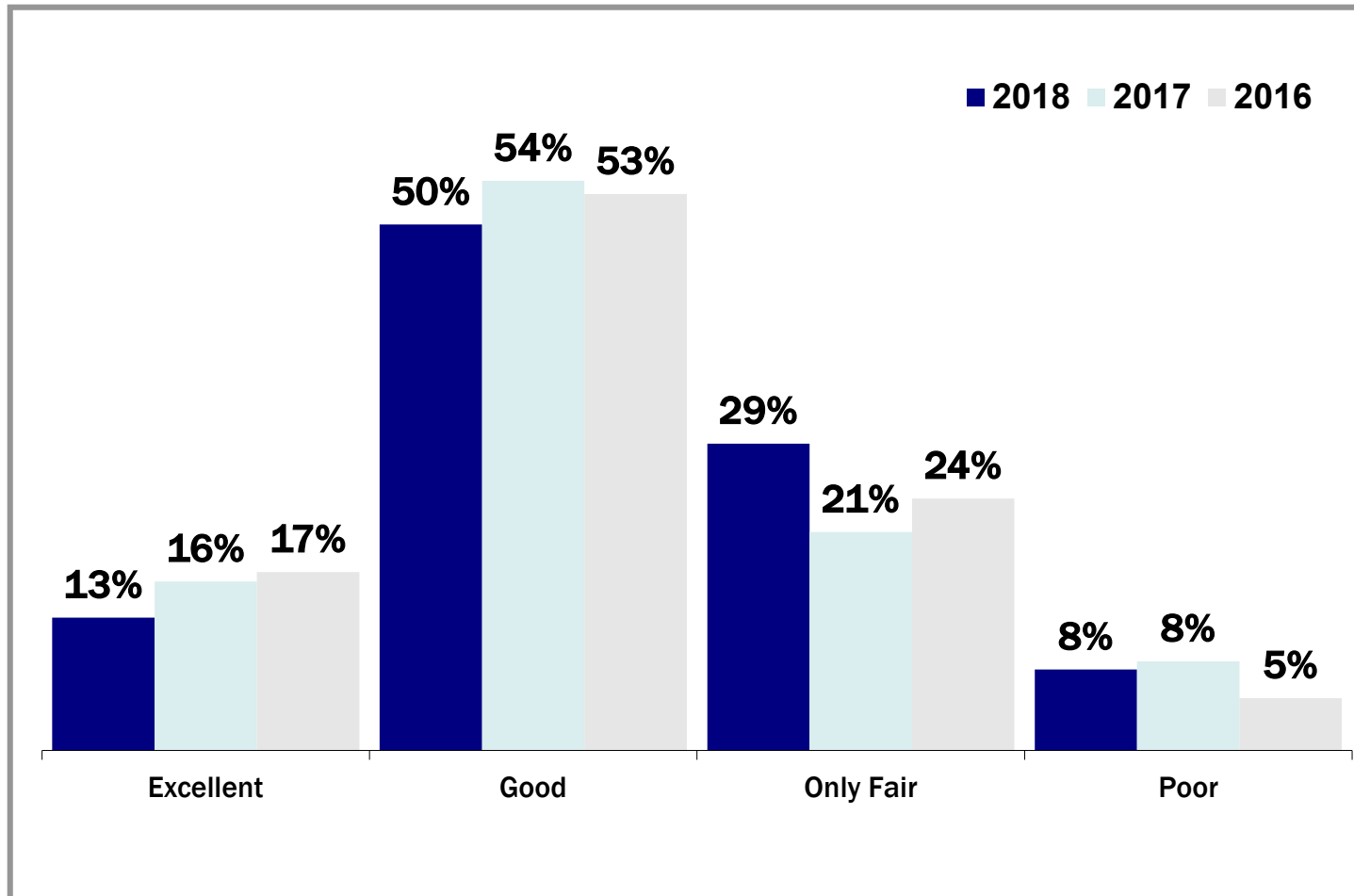
OVERALL RATING OF MUNI SERVICE - TRENDING

Overall, how would you rate MUNI's service? Would you say...

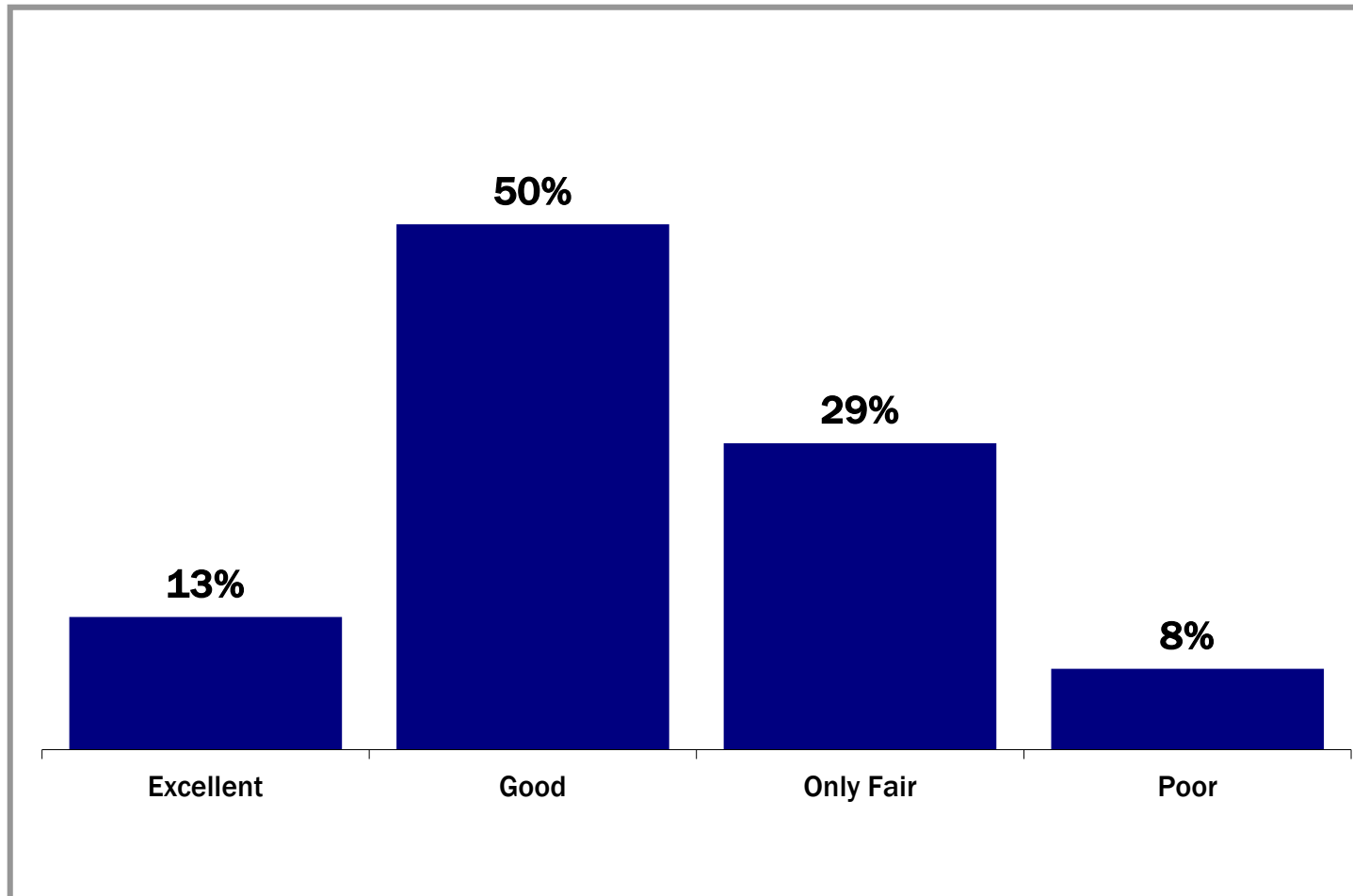**Trending: Overall Rating of Muni Service**
Excellent and Good Ratings Combined

2001	2002	2003	2004	2005	2006	2007	2010	2011	2012	2014	2015	2016	2017	2018
48%	57%	68%	64%	65%	53%	55%	52%	57%	62%	64%	66%	70%	70%	63%

Important Note: Between 2001-2004, a 5 point scale was used: excellent, good, fair, poor and very poor. Since 2005, a four point scale has been used: excellent, good, fair, and poor.

Base: 2018 Total (n=609)

OVERALL RATING OF MUNI SERVICE – SUB-GROUP RATINGS

Overall, how would you rate MUNI's service? Would you say...

Satisfaction Rating by...	- - - - - - 2018 - - - - - -		
	Excellent /Good	Fair Note: Read % across ▶	Poor
Total (all respondents) (n = 609)	63%	29%	8%
Usage of Muni			
5 or more days/week (n = 218)................................	58%	31%	10%
Several times a week (n = 151)................................	66%	27%	7%
Once a week (n = 65)................................	60%	35%	5%
Three times a month or less often (n = 175)....................	67%	27%	6%
By Service Line Type			
Regular Bus Line (n = 269)................................	66%	27%	7%
Rapid Bus Lines (n = 122)................................	70%	24%	6%
Rapid Rail Lines (n = 218)................................	55%	35%	10%
Income			
Less than $25,000 (n = 65)................................	66%	23%	9%
$25,000 - $49,999 (n = 92)................................	72%	16%	11%
$50,000 - $74,999 (n = 86)................................	62%	33%	6%
$75,000 - $99,999 (n = 46)................................	65%	28%	7%
$100,000 or more (n = 320)................................	59%	33%	7%

Base: 2018 Total (n=609)
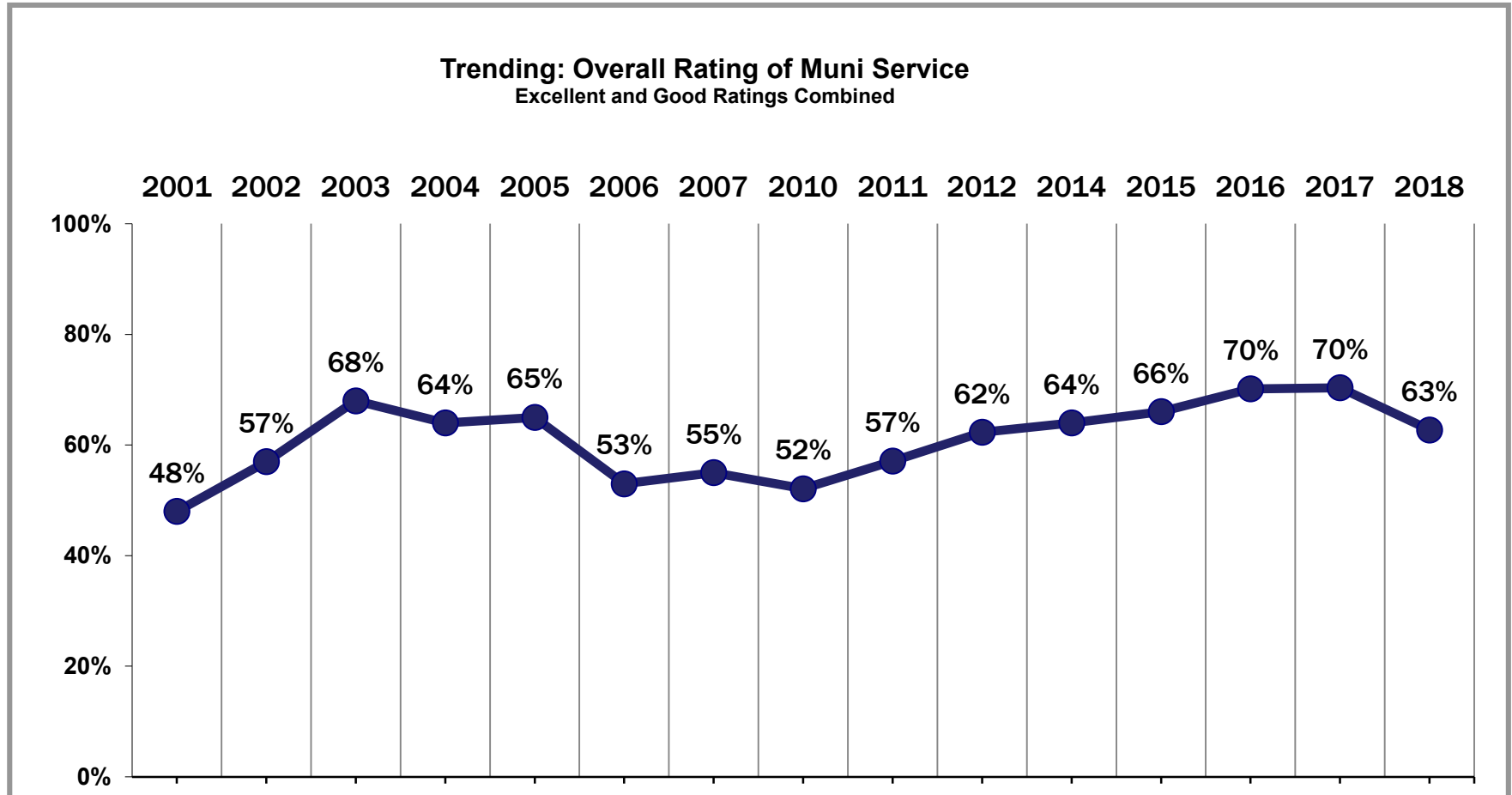
OVERALL RATING OF MUNI SERVICE– By Area

Overall, how would you rate MUNI's service? Would you say...

% Rating Service Excellent or Good
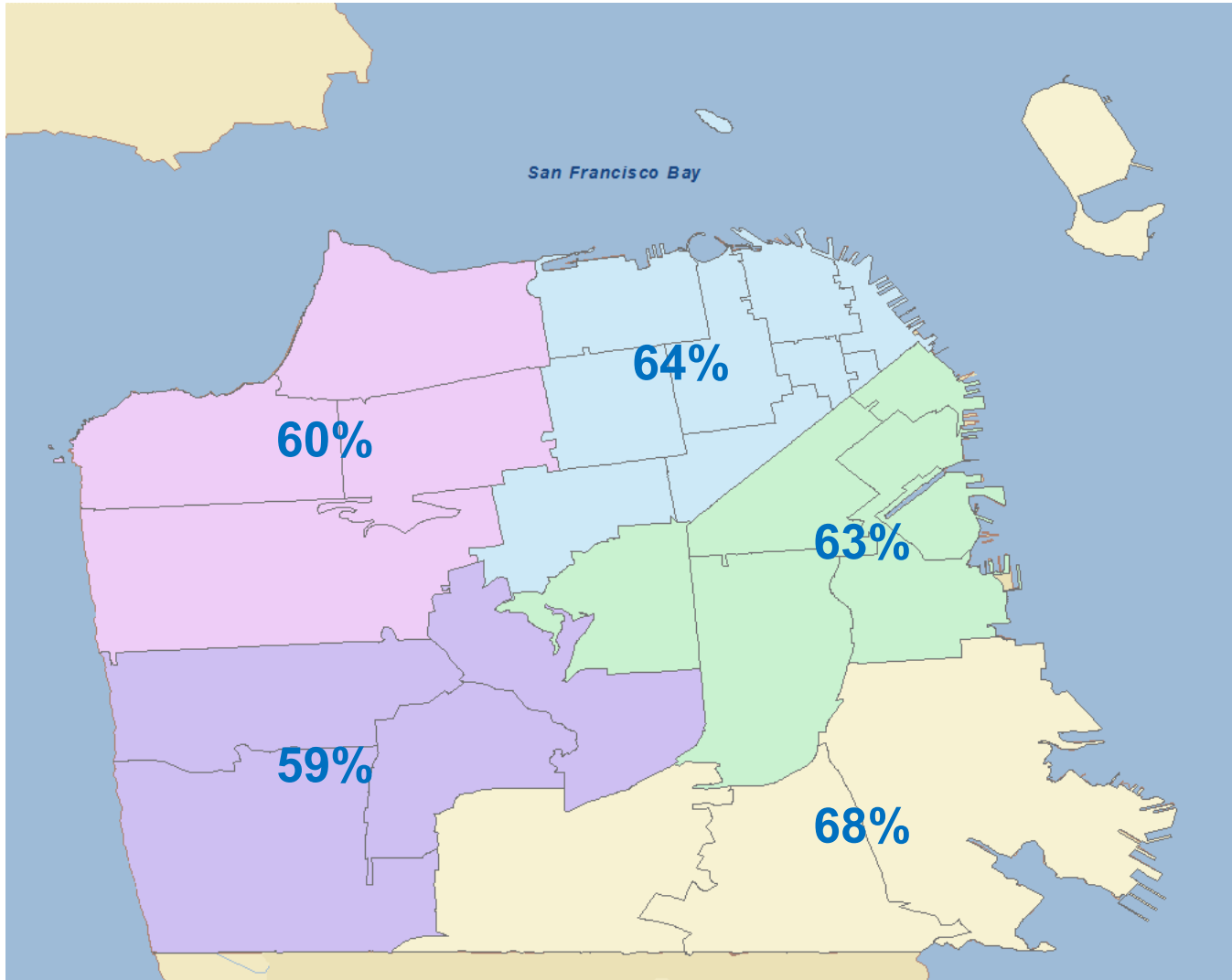
Base: 2018 Total (n=609)

OVERALL RATING OF MUNI SERVICE– Tunnel Work

Overall, how would you rate MUNI's service? Would you say…

	2018	2017	Change
Change (Excellent/Good %)			
Overall...	63%	70%	- 7%
Routes not affected by tunnel work..................................	66%	71%	- 5%
Routes directly affected by tunnel work............................	57%	66%	- 9%

Base: 2018 Total (n=609)

ASPECTS OF MUNI WOULD MOST LIKE TO SEE IMPROVED

What aspects of MUNI would you most like to see improved?

(Open-Ended. Multiple Responses Accepted)

Aspect	Percent
More frequent service	24%
Better on-time performance	20%
Vehicle/Station cleanliness	15%
Overcrowding	12%
Vehicle arrival predictions	10%
Better security/safety from crime	7%
Too many rude/rowdy/homeless/crazy/ impaired people on vehicles	7%
More efficient spacing of vehicles	7%
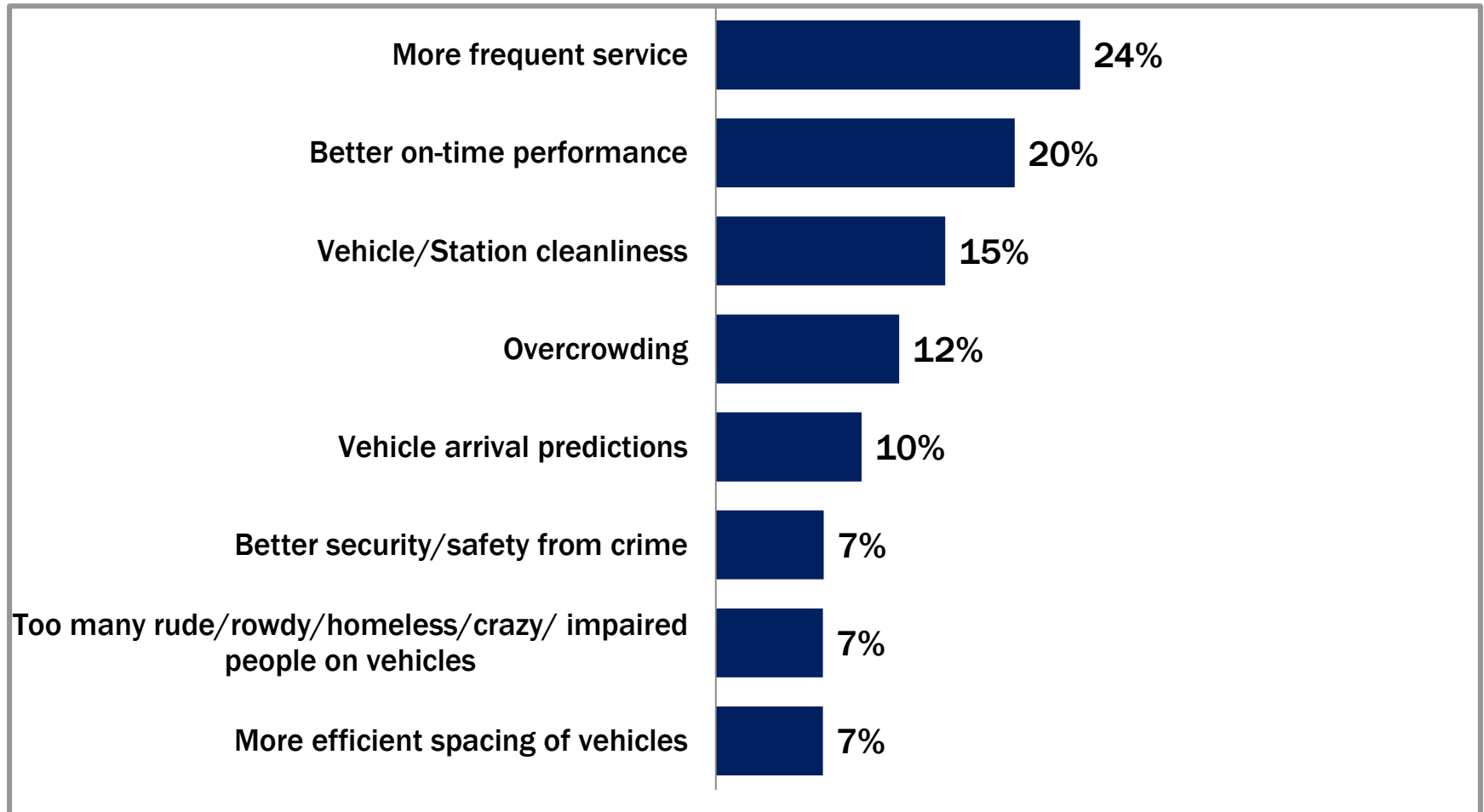
Note: Top items shown above. For complete list, reference the crosstabulated tables. To note: on this question 3% of respondents indicated they were satisfied with Muni service or made a similar positive comment.

Base: 2018 Total (n=609)

RATING OF SPECIFIC MUNI ATTRIBUTES

Now I would like to ask about the MUNI's performance in different areas. For each area I read, please tell me whether MUNI does an excellent job, a good job, a fair job, or a poor job in this area.

(% saying <u>excellent</u> or <u>good</u>)

	2018	2017	2016
Accessibility for persons with disabilities.....................	75%	78%	75%
Operator (driver) helpfulness.....................................	67%	71%	71%
Trips take a reasonable amount of time......................	68%	66%	65%
Navigating road construction / congestion................	66%	65%	Not Asked
Accurate arrival predictions	55%	62%	Not Asked
Frequency of service...	51%	60%	58%
Feeling safe & secure from crime on a Muni vehicle....	54%	60%	55%
Feeling safe & secure waiting at a Muni stop..............	57%	59%	59%
Reliability / On-time performance..............................	50%	58%	56%
Communication with riders..	55%	54%	55%
Vehicle cleanliness...	51%	51%	51%
Managing crowding on Muni vehicles........................	33%	39%	35%

RATING OF SPECIFIC MUNI ATTRIBUTES

**Low Rating/High Impact
(Opportunities for Improvement)**

**High Rating/High Impact
(Doing Well)**

More Important

Reliability/Ontime Performance

Frequency of service

Trips take a reasonable amount of time

DERIVED IMPORTANCE

Managing crowding on Muni vehicles

Navigating road construction and
congestion in the city

Operator (Driver) Helpfulness

Communications with riders

Providing accurate arrival predictions

Vehicle Cleanliness

Feeling safe & secure while waiting at a
Muni Stop or station

Feeling safe/secure from crime on a
Muni vehicle

Less Importanat

**Low Rating/Low Impact
(Lower Priority)**

**High Rating/Low Impact
(Exceeding Expectations)**

Lower Rating

PERFORMANCE (4 point scale: 1=poor to 4=excellent)

Higher Rating

Base: 2018 Total (n=609)

18

SFMTA RESPONSIBILITIES

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In general, how familiar are you with the SFMTA and its responsibilities?

Trending: Familiar with SFMTA and Its Responsibilities
Very and Somewhat Familiar Ratings Combined

51%   51%   51%   55%   60%
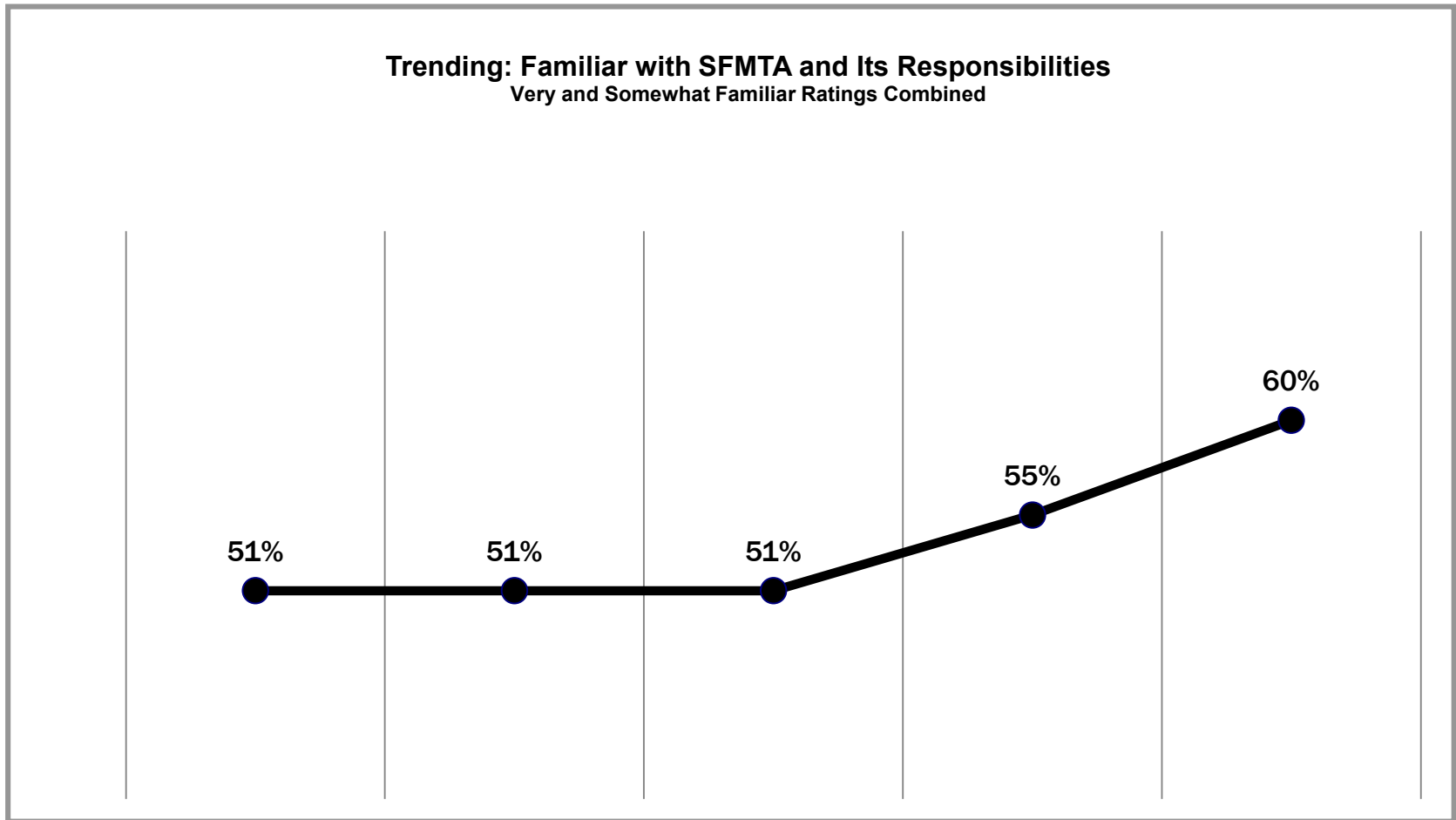
^ SFMTA responsibilities described as: a City agency which oversees Muni, bike and pedestrian programs, taxis as well as parking and traffic in the City

Base: 2018 Total (n=609)

ALTERNATIVES TO MUNI

ALTERNATIVES IF MUNI NOT AVAILABLE – 2018 vs. 2017

Think about your last Muni trip. If Muni was not available for that trip, how would you have gotten where you needed to go?

	2018	2017	Change
Modes Increasing			
Use ride hailing services...................................	44%	34%	**+10%**
Use other transit such as BART....................................	6%	5%	**+1%**
Walk..	17%	17%	**0%**
Ride a bicycle...	3%	3%	**0%**
Modes Decreasing			
Drive (myself)...	13%	17%	**-4%**
Get a ride..	5%	8%	**-3%**
Would not have made trip..	5%	7%	**-2%**
Use a taxi..	7%	9%	**-2%**

Base: 2018 Total (n=609)

WHY RIDE HAIL INSTEAD OF MUNI

What is the main reason you choose a ride hailing service like Uber or Lyft rather than Muni in these situations?

Reason	Percentage
Faster/Goes directly to destination	41%
In a hurry/Don't have to wait	28%
Door to door service	17%
Safer than Muni	11%
Cheaper/Nearly the same price as Muni	9%
More reliable than Muni	9%
Limited night/early morning service on Muni	6%
Muni is crowded	5%
Cleaner than Muni	4%
More comfortable than Muni	2%
Have to carry multiple or large items	2%
Disability/Age issues	<1%
Been drinking	<1%

Base: 2018 Would use a ride hail service (n=257)

BARRIERS TO MUNI USE

BARRIERS TO MUNI USE

What is the main reason you don't ride Muni more?

Barriers to Muni Use

Barrier	Percentage
MUNI trips take too long/are too complicated	18%
I commute/travel out of the City	12%
Unsafe/Lack of security/Too much crime onboard	8%
Live close to work/shopping, etc.	7%
Need car for business/Drive company provided vehicle	7%
Too many unruly riders/homeless/ people with mental problems aboard	7%
Prefer to walk/bike for the exercise/environmental concerns	7%
Too dirty/Unsanitary	6%
Do not want to be held to a schedule	6%

Only responses cited by 6% or more respondents are shown, see crosstabulated tables for complete list
Base: Have not ridden Muni in past six months (n=436)