2024 Muni Onboard Customer Survey
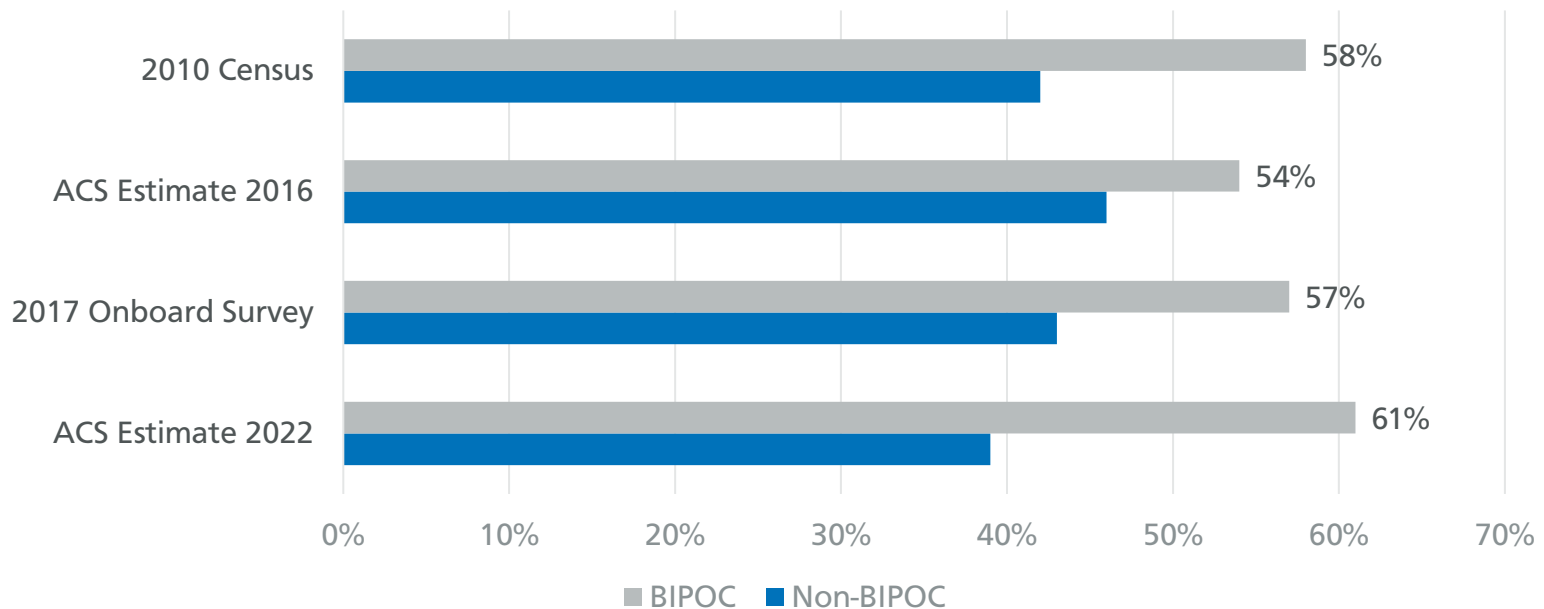
SFMTA Board Meeting

December 5, 2023

Overview

- Current ridership data is critical to inform the Muni Service Equity Strategy and help ensure that transit decisions, including proposed fare and service changes, do not have disparate impacts

- As a federally funded agency, we're required to collect onboard travel behavior and demographic data at least once every five years to comply with Title VI of the Civil Rights Act requirements; the last survey was conducted in 2016-2017

- This data collection is especially valuable now given the scale of changes for San Francisco demographics and customer travel patterns since 2017

Contract Summary/Survey Administration

- SFMTA accessed a competitively procured consultant bench established by MTC, saving time, money and resources and allowing data collection to begin this Spring

- Onboard intercept survey to collect over 25,000 surveys (approx. 5% of current ridership) with the following features:
    - Administered in multiple languages
    - Collected in all time periods including weekday, weekend, and Owl Service
    - Statistically significant at the route level
    - Documents customer travel patterns, income levels, race/ethnicity, language proficiency, and fare media usage

- Outreach to inform employees, including transit operators, and the public regarding survey effort and the importance of gathering data

Changing City/Ridership Demographics: Race

- **BIPOC Residents Grew as a Proportion since 2016:** According to the American Community Surveys (1-year estimates) from 2016 and 2022, the proportion of BIPOC residents in San Francisco has grown from 54% to 61%

- **Muni Ridership and SF Demographics:** According to the last onboard survey conducted in 2016, Muni ridership overall tracked higher than the general SF population for BIPOC demographics

	BIPOC
2010 Census	58%
ACS Estimate 2016	54%
2017 Onboard Survey	57%
ACS Estimate 2022	61%

Legend: ■ BIPOC ■ Non-BIPOC

Changing City/Ridership Demographics: Income

- **Reported Low-Income Households Fell in San Francisco:** According to the American Community Surveys (1-year estimates) from 2016 and 2022, the proportion of low-income households (considered 200% of the federal poverty level) fell from 21.8% in 2016 to 17.5% in 2022.

- **Muni Ridership and SF Demographics:** According to the last onboard survey conducted in 2016, Muni ridership overall tracked higher than the general SF population in terms of low-income households.

Next Steps

- **Winter 2024:** Survey Administration and Preparation/Pilot Survey

- **Winter/Spring 2024:** Collect Surveys

- **Summer 2024:** Data Cleaning and Delivery/Report and Presentation