Presentation:

2019 Travel Decision Survey

We have work to do, but sustainable trips are growing in areas where the SFMTA is making investments.

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2019 Travel Decision Survey

Background

Mode share measures the percentage of travelers using a particular type of transportation. *It is an indicator measuring how well San Franciscans can access their daily needs.*

**Survey Purpose:** Measure mode share to track progress towards Strategic Plan Objective 2.2: 80 percent sustainable trips by 2030

**Methodology:** Survey firm completed a telephone survey of 840+ Bay Area residents in May-August 2019, capturing over 10,400 reported trips

**History:** Annual survey since 2012 - 2017, switch to biennial survey in 2017 to capture more significant changes in mode shift
2019 Travel Decision Survey

**Methods Update**

Between 2017 and 2019 to align with the Strategic Plan, trip categorization changed - *Transportation Network Companies (TNCs)* categorized as non-sustainable.

<table>
<thead>
<tr>
<th>2017</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Private:</strong></td>
<td><strong>Non-Sustainable:</strong></td>
</tr>
<tr>
<td>• Drive Alone</td>
<td>• Drive alone</td>
</tr>
<tr>
<td>• Carpool/drive with others</td>
<td>• Carpool/drive with others</td>
</tr>
<tr>
<td></td>
<td>• TNC</td>
</tr>
<tr>
<td><strong>Non-Private:</strong></td>
<td><strong>Sustainable:</strong></td>
</tr>
<tr>
<td>• Walk</td>
<td>• Walk</td>
</tr>
<tr>
<td>• Transit</td>
<td>• Transit</td>
</tr>
<tr>
<td>• Bike</td>
<td>• Bike</td>
</tr>
<tr>
<td>• Other (taxi, carshare)</td>
<td>• Other (taxi, carshare)</td>
</tr>
<tr>
<td>• TNC</td>
<td>• TNC</td>
</tr>
</tbody>
</table>
2019 Travel Decision Survey
Mode Share 2019

47% Sustainable Trips
Over last 2 years (since 2017):

- Drive Alone 31%
- Transit 22%
- Walking 22%
- Carpool 17%
- TNC 5%
- Bicycle 2%
- Other 1%

*Transportation Network Company
2019 Travel Decision Survey

Percent Mode Share: 2019 Categorization

For accurate comparison, data between 2013-2017 adjusted to reflect current categorization of sustainable mode share.

- 2013: 50%
- 2014: 53%
- 2015: 51%
- 2016: 52%
- 2017*: 54%
- 2019: 47%

2030 Target: 80%

50% Target

*FY2017 data adds to 101% due to rounding.
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Raw Trips: 2019 Current Categorization

- Sustainable Trips
- Nonsustainable Trips

Trip calculations based on San Francisco Chained Activity Modeling Process
### 2019 Travel Decision Survey

#### Income & Sustainable Mode Use

<table>
<thead>
<tr>
<th>Income Level</th>
<th>San Francisco</th>
<th>Zone 1</th>
<th>Zone 2</th>
<th>Zone 3</th>
<th>Zone 4</th>
<th>Zone 5</th>
<th>Outside San Francisco</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>$35,000 or less</td>
<td>59%</td>
<td>77%</td>
<td>58%</td>
<td>72%</td>
<td>43%</td>
<td>49%</td>
<td>43%</td>
<td>47%</td>
</tr>
<tr>
<td>$35,001-$75,000</td>
<td>51%</td>
<td>44%</td>
<td>78%</td>
<td>21%</td>
<td>47%</td>
<td>34%</td>
<td>51%</td>
<td>55%</td>
</tr>
<tr>
<td>$75,001-$100,000</td>
<td>46%</td>
<td>34%</td>
<td>61%</td>
<td>58%</td>
<td>37%</td>
<td>17%</td>
<td>61%</td>
<td>50%</td>
</tr>
<tr>
<td>$100,001-$200,000</td>
<td>43%</td>
<td>59%</td>
<td>54%</td>
<td>35%</td>
<td>19%</td>
<td>34%</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Over $200,000</td>
<td>44%</td>
<td>64%</td>
<td>40%</td>
<td>46%</td>
<td>32%</td>
<td>23%</td>
<td>54%</td>
<td>51%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>47%</strong></td>
<td><strong>59%</strong></td>
<td><strong>55%</strong></td>
<td><strong>43%</strong></td>
<td><strong>33%</strong></td>
<td><strong>35%</strong></td>
<td><strong>51%</strong></td>
<td></td>
</tr>
</tbody>
</table>

*shaded cells indicate populations where sustainable mode share is above 50%
2019 Travel Decision Survey
Transit Ridership Trends

Muni ridership statistics are not trending with other Bay Area Transit agencies. Ridership **grew** significantly where the SFMTA made investments in the transit system.

Improving the 5 Fulton line and creating the 5R Fulton Rapid has resulted in a **60% increase in ridership** since 2009.

Rapid service and transit priority improvements on 11th Street, Bayshore Boulevard, Potrero Avenue, and San Bruno Avenue has resulted in a **40% increase in ridership** on the 9 San Bruno and 9R San Bruno Rapid since 2009.
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**Conclusion: We need to do more**

The proportion of people choosing cars has increased. Less driving is fundamental to every one of SFMTA’s goals, making performance metrics like mode shift critical.

The SFMTA’s responsibility is **to make sustainable travel a workable and attractive choice, which requires:**

- Clear commitment to our city's values
- Understanding tradeoffs with taking on big challenges
- A holistic approach with multifaceted solutions
- Doing more of our good work