S.F. MUNICIPAL TRANSPORTATION AGENCY

RIDERSHIP SURVEY 2021
EXECUTIVE SUMMARY
QUESTIONNAIRE

prepared for
S.F. MUNICIPAL TRANSPORTATION AGENCY

compiled by
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EXECUTIVE SUMMARY
Ridership Survey 2021 - S.F. Municipal Transportation Agency

BACKGROUND

This project was a telephone survey conducted among adult San Francisco residents. A total of 413 interviews were conducted during the period August 17, 2021 to October 6, 2021. Interviews were conducted in English, Spanish, and Cantonese. The margin of error is +/-4.8%.
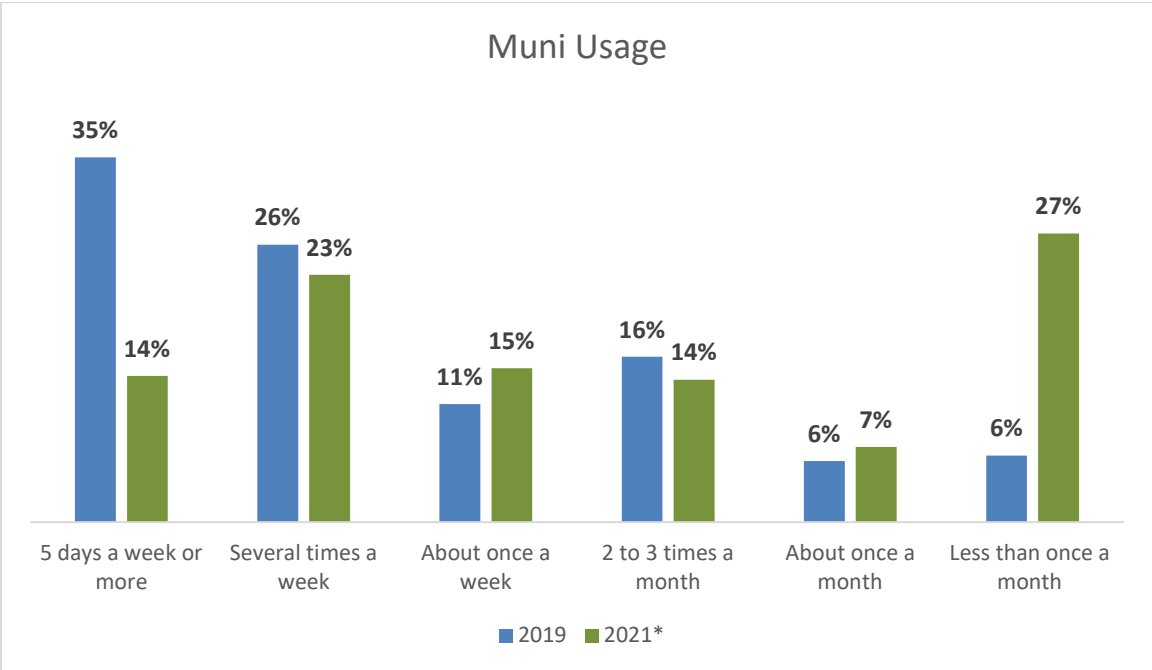
Some primary objectives of this survey include:
- Determine differences in Muni usage based on Covid 19 Pandemic
- Assess usage of Muni service
- Track trends in customer satisfaction
- Better understand key issues that drive overall customer satisfaction
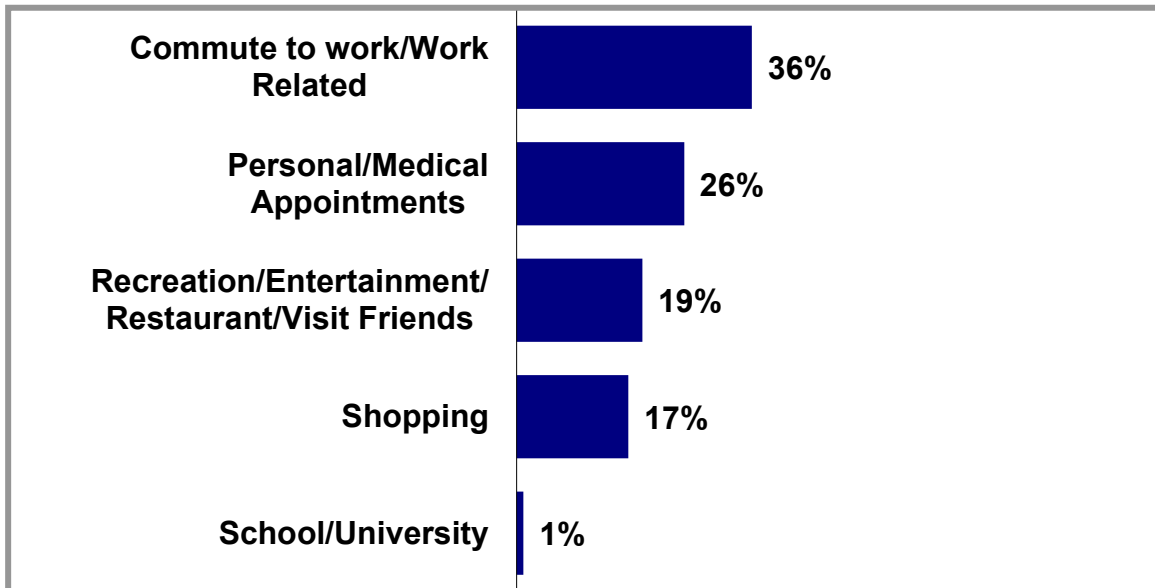- Identify barriers to using Muni

KEY FINDINGS

USAGE OF MUNI
In 2019, nearly three-quarters (72%) of riders rode Muni once a week. Since the start of the pandemic*, this has decreased to just over half (52%).

Muni Usage

Category	2019	2021*
5 days a week or more	35%	14%
Several times a week	26%	23%
About once a week	11%	15%
2 to 3 times a month	16%	14%
About once a month	6%	7%
Less than once a month	6%	27%

*2021 responses (N=281) are those who stated they have used Muni since the start of the Pandemic (March 2021)
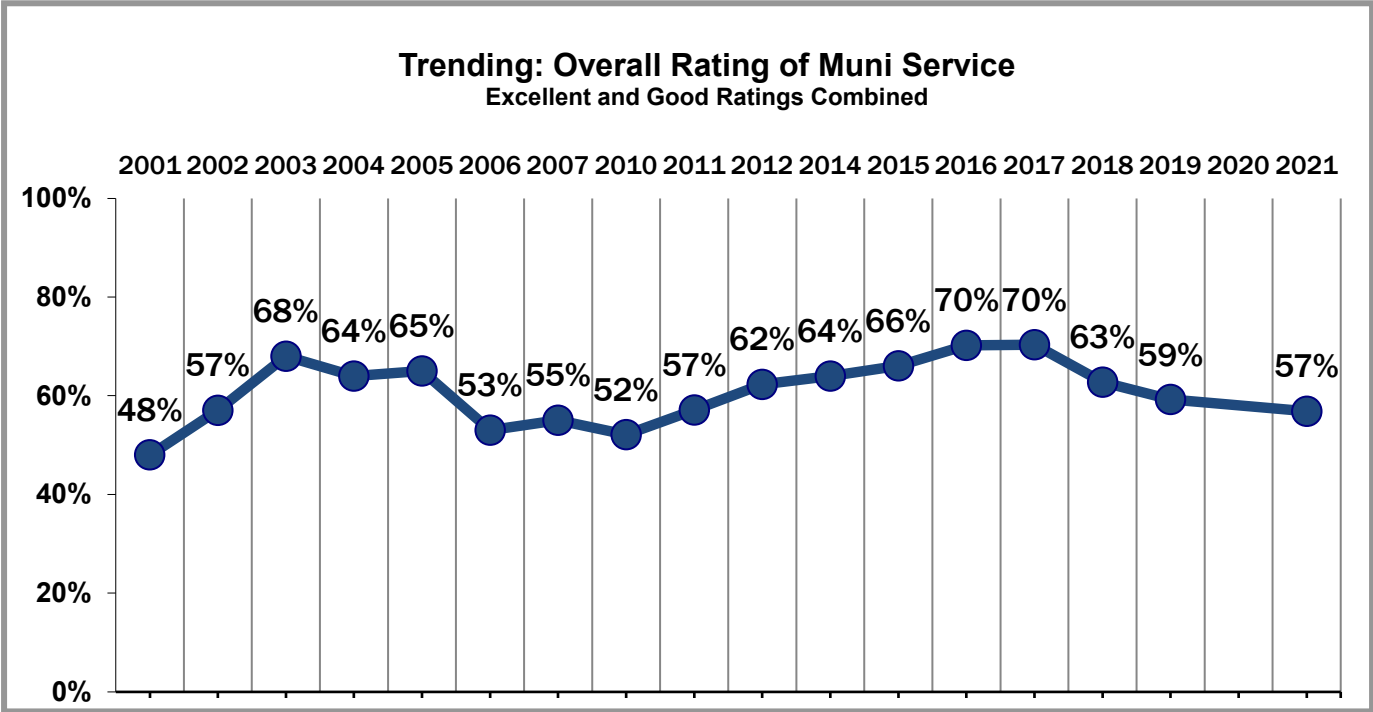
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Just over one-third (36%) of respondents are using Muni to commute to work. One quarter of respondents (26%) are using Muni to travel to conduct personal business/go to medical appointments. Almost two in ten respondents (19%) are traveling to a recreation/restaurant destination.

Commute to work/Work Related	36%
Personal/Medical Appointments	26%
Recreation/Entertainment/ Restaurant/Visit Friends	19%
Shopping	17%
School/University	1%

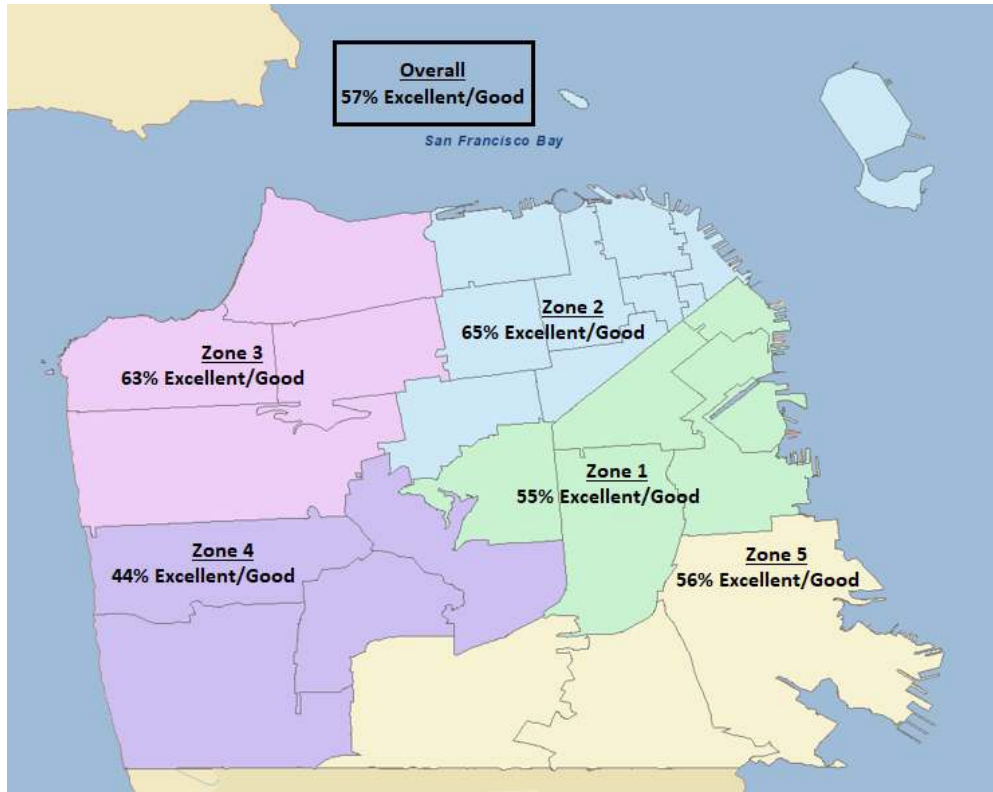## OVERALL RATING TREND

- Over half of respondents (57%) rate Muni service as excellent or good.
- Overall satisfaction among Muni riders has declined.

Overall Rating of Muni Service

57%

46%

32%

11%

12%

Excellent   Good   Only Fair   Poor

Trending: Overall Rating of Muni Service
Excellent and Good Ratings Combined
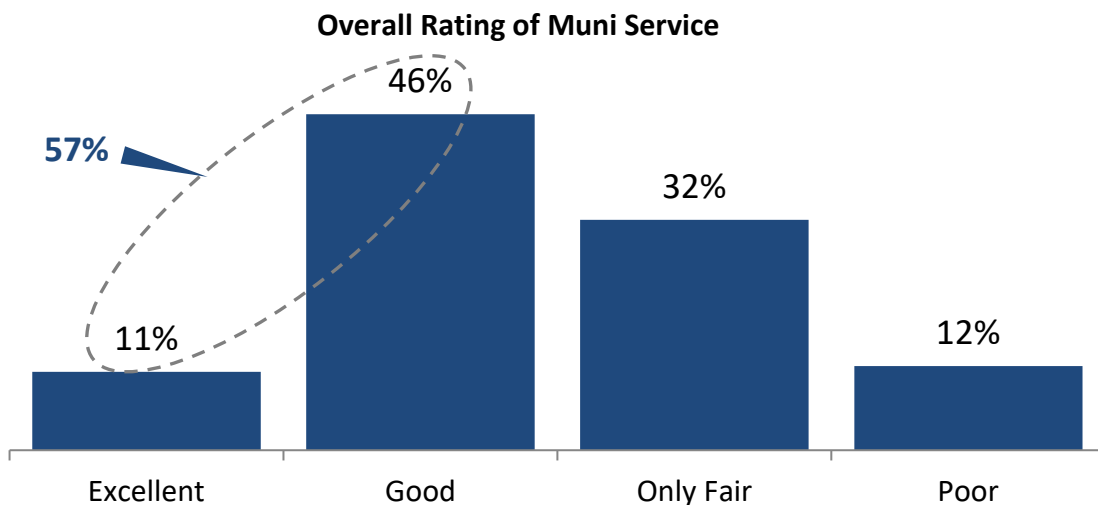
Note: Between 2001-2004, a 5 point scale was used; since 2005, a 4 point scale has been used: excellent, good, fair and poor. Survey was not conducted in 2020

Overall
57% Excellent/Good

San Francisco Bay

Zone 2
65% Excellent/Good

Zone 3
63% Excellent/Good

Zone 1
55% Excellent/Good

Zone 4
44% Excellent/Good

Zone 5
56% Excellent/Good

OVERALL RATING – BY SUBGROUPS

- Current riders who use Muni 5 days a week or more rate Muni higher than those current riders who only ride Muni several times a week.
- Those using Muni for work/school rate Muni service lower than other riders.
- Respondents in Zone 2 (Financial District, North Beach, Marina, Hayes Valley, and the Tenderloin) rated Muni higher than respondents who live in other zones of the city.

Satisfaction Rating by…	Excellent / Good	Fair	Poor
Total (all respondents) (n = 374)	57%	32%	12%
Usage of Muni-Currently^			
5 or more days/week (n = 39)	69%	26%	5%
Several times a week (n = 66)	45%	45%	9%
Once a week (n = 41)..	76%	20%	5%
Three times a month or less (n = 135)............................	56%	29%	16%
Trip Purpose			
Work / School (n = 104)	48%	38%	14%
Personal Business (n = 72)..	65%	26%	8%
Other Purpose (n = 105)	63%	28%	10%
Income			
Less than $25,000 (n = 24)	63%	33%	4%
$25,000 - $49,999 (n = 35)	74%	25%	<1%
$50,000 - $74,999 (n = 44)	57%	30%	14%
$75,000 - $99,999 (n = 51)	51%	27%	22%
$100,000 or more (n = 219)	55%	34%	11%
Household Size			
1 person (n = 111)..	63%	28%	9%
2 people (n = 147)..	54%	35%	12%
3-4 people (n = 79)	54%	29%	17%
5 or more people (n = 14)	57%	36%	7%
Zone			
1 (n = 82)...	55%	34%	11%
2 (n = 96)...	65%	25%	10%
3 (n = 78)...	63%	28%	9%
4 (n = 73)	44%	36%	21%
5 (n = 39)	56%	41%	3%

Note: More than one response was allowed for the trip purpose categories.

^ Respondents who answered Q2 ("Since the start of the Pandemic, March 2020, how often have you ridden Muni") between five days a week or more and less than once a week
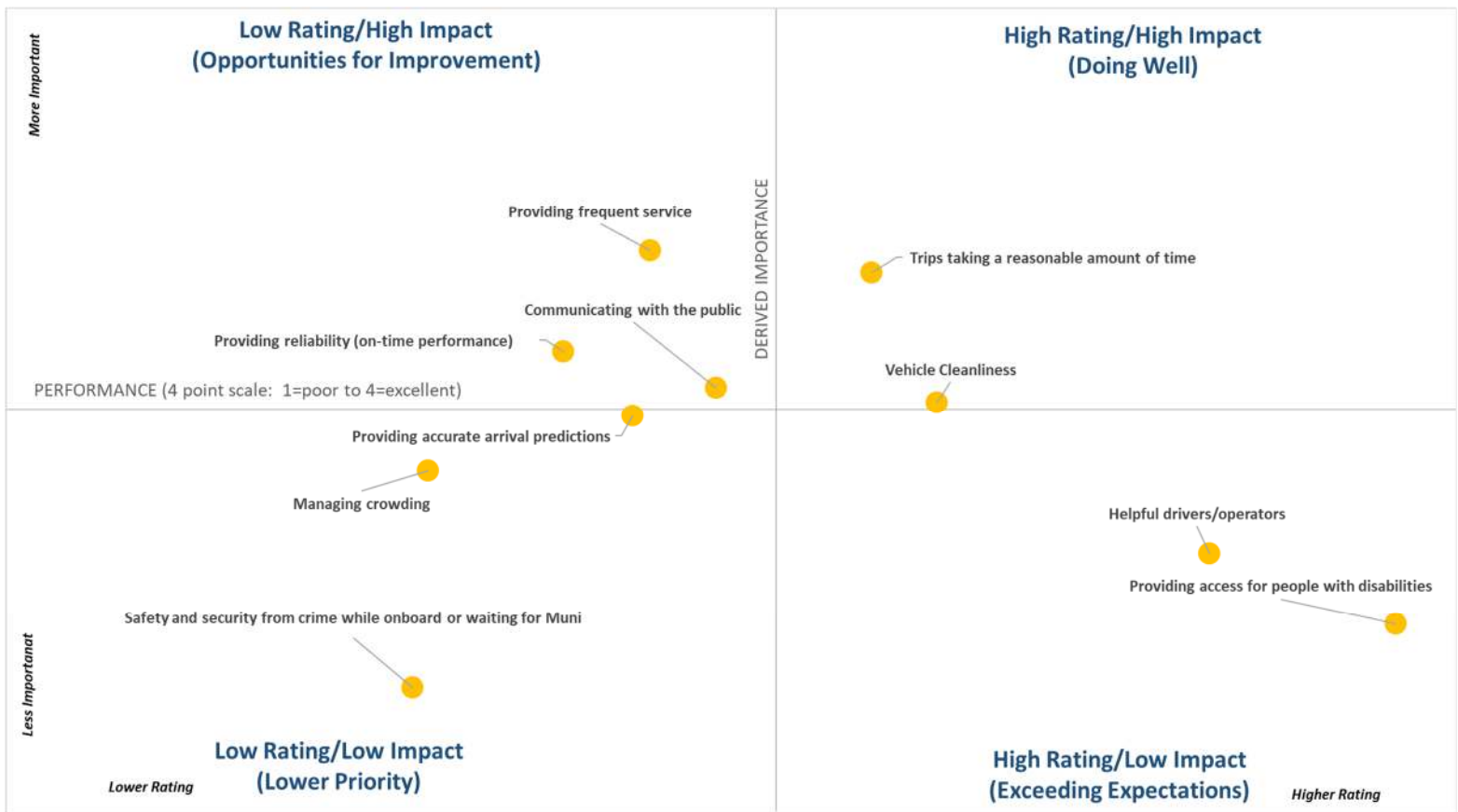
SERVICE ATTRIBUTES

Riders were asked to rate Muni's performance on specific service characteristics. Additionally riders were asked to rate Muni overall. The chart below shows the correlation between each service characteristic and the overall Muni rating question. This chart may help provide insights when considering priorities related to improving customer satisfaction.

This chart quantifies how important each service characteristic appears to be from a customer perspective (using the vertical axis) and shows the average customer rating for each characteristic (using the horizontal axis).

- "Providing frequent service" and "Providing reliability" are key drivers in overall satisfaction.

Attribute Quadrant Chart

Chart axes and labels:
- Vertical axis: More Important (top) to Less Importanat (bottom); labeled DERIVED IMPORTANCE
- Horizontal axis: Lower Rating (left) to Higher Rating (right)
- Top-left quadrant: Low Rating/High Impact (Opportunities for Improvement)
- Top-right quadrant: High Rating/High Impact (Doing Well)
- Bottom-left quadrant: Low Rating/Low Impact (Lower Priority)
- Bottom-right quadrant: High Rating/Low Impact (Exceeding Expectations)
- PERFORMANCE (4 point scale: 1=poor to 4=excellent)

Plotted attributes:
- Providing frequent service
- Communicating with the public
- Providing reliability (on-time performance)
- Trips taking a reasonable amount of time
- Vehicle Cleanliness
- Providing accurate arrival predictions
- Managing crowding
- Helpful drivers/operators
- Providing access for people with disabilities
- Safety and security from crime while onboard or waiting for Muni

MUNI SERVICE ATTRIBUTES

The chart below shows the how the Muni service attributes have rated over the past three years the survey has been conducted.

Since 2019, individual attributes have generally inecreased or remained the same.The greatest increase was decreases were Cleaning Muni vehicles which increased from 49% to 50%. The other two notable increases were "Accessibility for persons with disabilities" which increased from 71% in 2019 to 79% in 2021 and "Managing crowding on Muni vehicles," which increased from 31% in 2019 to 38% in 2021.

	(% saying excellent or good)		
	2021	2019	2018
Accessibility for persons with disabilities...............	**79%**	71%	75%
Operator (driver) helpfulness..................................	**70%**	66%	67%
Cleaning Muni vehicles^..	**60%**	49%	51%
Trips take a reasonable amount of time	**57%**	61%	68%
Communication with the public^........................... .	**50%**	48%	55%
Accurate arrival estimates^^.................................	**45%**	50%	55%
Frequency of service	**45%**	50%	51%
Reliability/On-time performance	**42%**	44%	50%
Managing crowding on Muni vehicles	**38%**	31%	30%
Safety and security from crime while onboard or waiting for Muni*	**38%**	-	-
Feeling safe & secure waiting at a Muni stop*………..	-	50%	57%
Feeling safe & secure from crime on a Muni vehicle*	-	48%	54%

^ In 2019 and 2018, this was phrased as "Vehicle cleanliness"
^^ In 2019 and 2018, this was phrased as "Communication with riders"
in 2019 and 2019, this was two questions: "Feeling safe & secure from crime on a Muni vehicle" and "Feeling safe & secure waiting at a Muni stop

COVID 19 IMPACT

One quarter (25%) of riders who rode Muni prior to the Pandemic have not used it since the Pandemic. Riders who rode prior to the pandemic rode a mean of 3.58 days per week. This mean has decreased to 1.81 days per week for riders who have ridden since the pandemic began.

Nearly one-third (30%) of riders plan to use Muni more often than they do after the pandemic. Half (46%) will use it about the same and 21% will use it less. Only 3% of riders said they would not ride Muni again after the pandemic.

Nearly half (42% of riders says concerns about Covid make them less likely to ride right now.
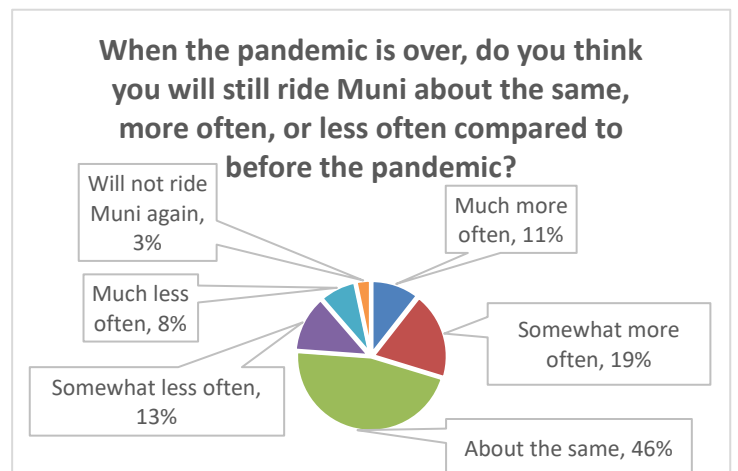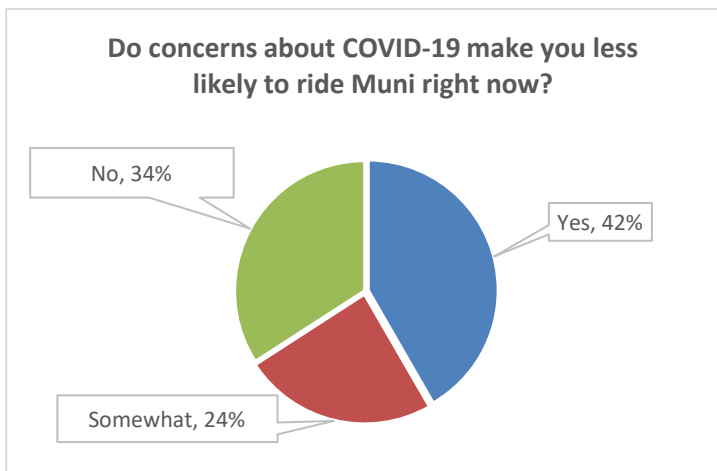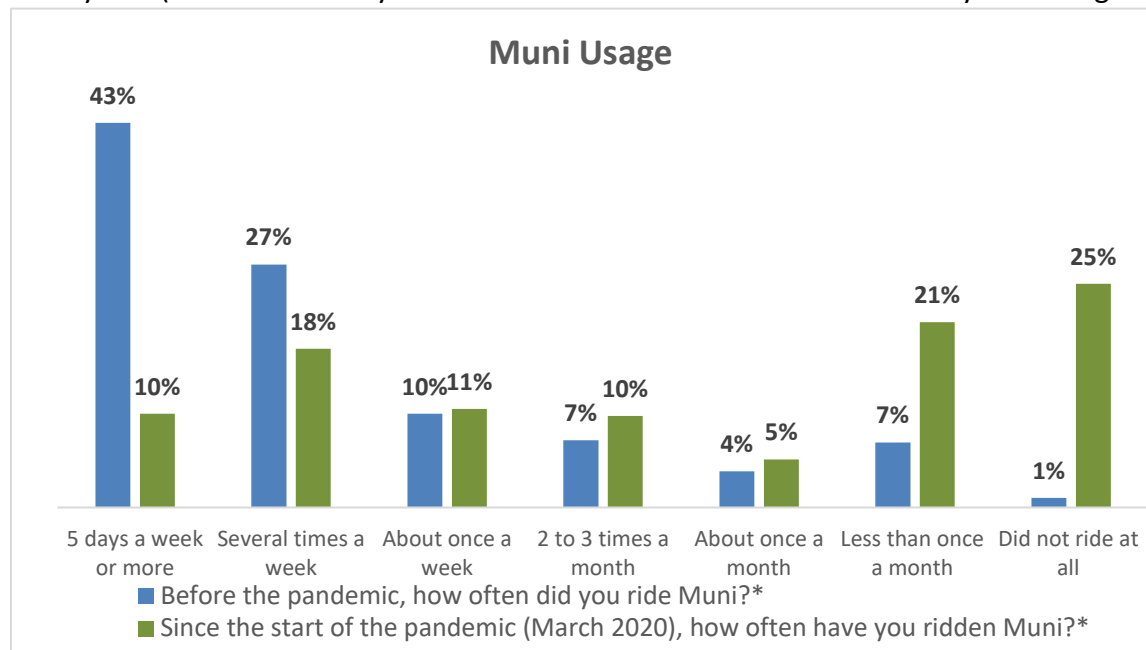
*Respondents (N=374) are those who stated they used Muni rior to the Pandemic or have used it since the start of the Pandemic
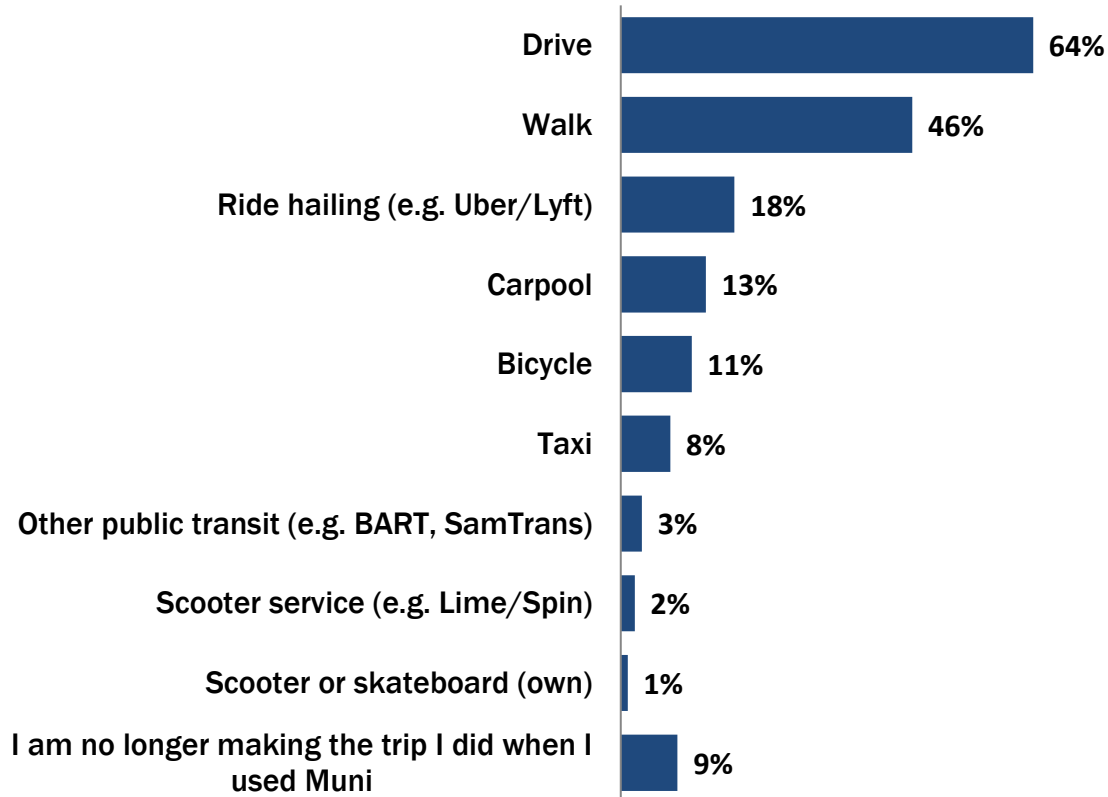
Alternative Mode instead of Muni

Two-thirds (64%) of riders who had used Muni in the past and do not plan on riding after the poandemic have switched to driving for their trips. Another half (46%) walk.

Most riders still have made their planned trips, as only 9% indicated they have stopped making the trip they used Muni for.

What Mode(s) Of Transportation Are You Using Now Instead Of Muni?

| Mode	Percentage
Drive	64%
Walk	46%
Ride hailing (e.g. Uber/Lyft)	18%
Carpool	13%
Bicycle	11%
Taxi	8%
Other public transit (e.g. BART, SamTrans)	3%
Scooter service (e.g. Lime/Spin)	2%
Scooter or skateboard (own)	1%
I am no longer making the trip I did when I used Muni	9%

Note: More than one response was allowed.
Base – Former riders – rode Muni prior to Pandemic, but don't plan on riding after Pandemic (n=93)

SFMTA RESPONSIBILITIES

The percentage of respondents familiar with SFMTA's responsibilities continued to increase.

- In 2021, three-quarters (75%) are very/somewhat familiar with the SFMTA and its responsibilities.
- Nearly half of respondents (42%) were at least somewhat satisfied with SFMTA's management of transportation in San Francisco.

Very familiar (4)	Somewhat familiar (3)	Not too familiar (2)	Not at all familiar (1)
26%	49%	17%	8%
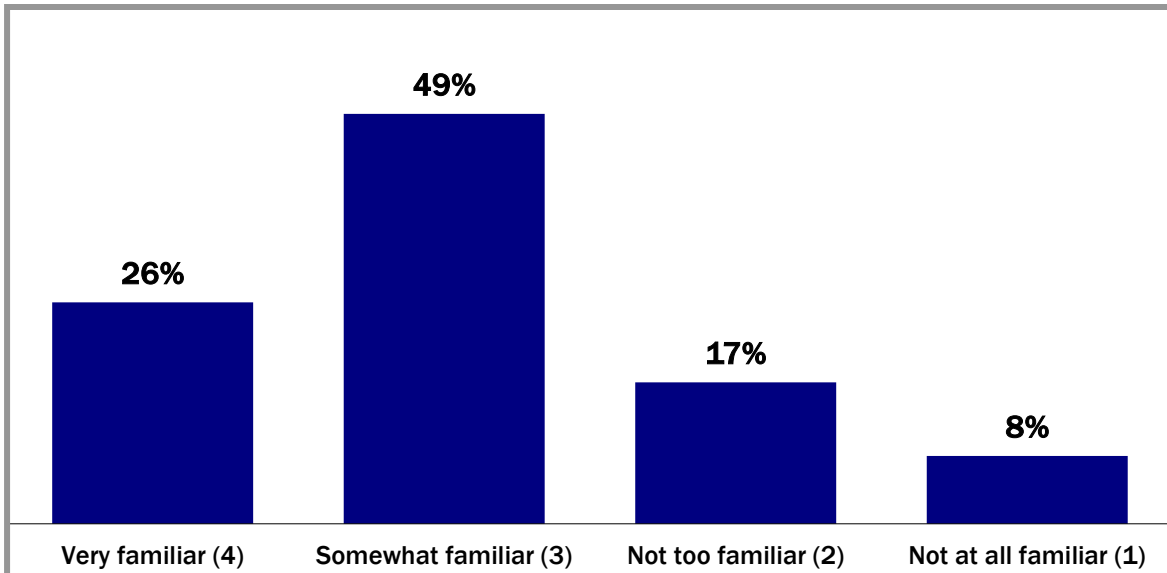
How Satisfied Are You With The Job SFMTA Does With Managing Transportation In San Francisco?

Very Satisfied	Somewhat Satisfied	Neutral	Somewhat Dissatisfied	Very Dissatisfied
9%	33%	22%	26%	11%
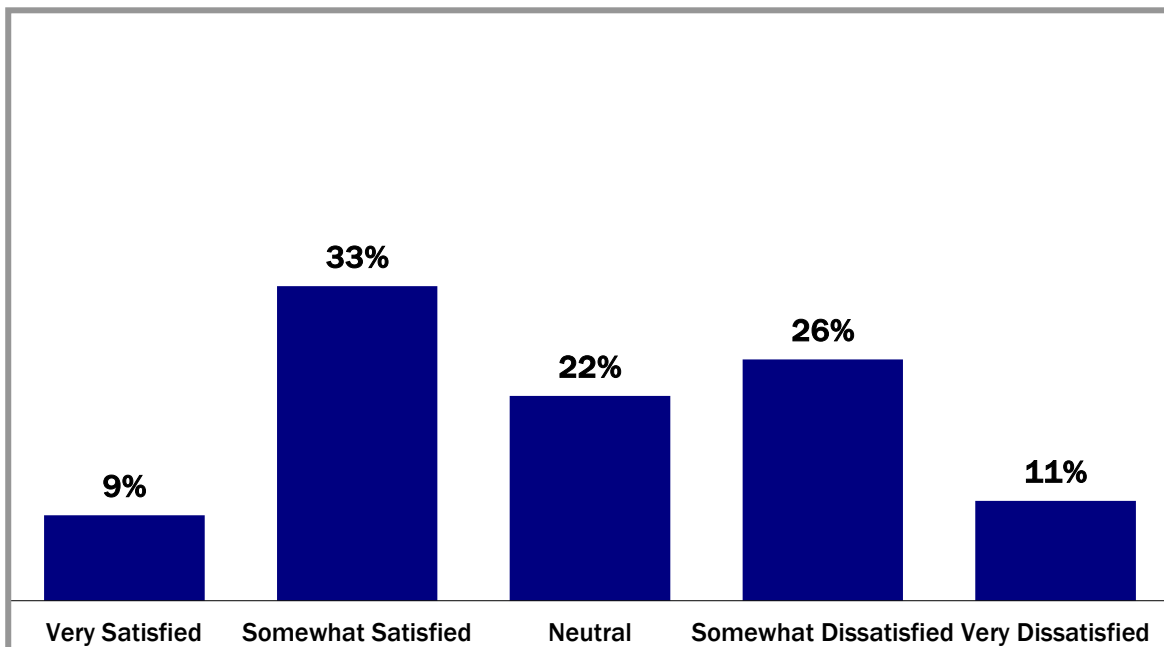
INCENTIVES FOR MUNI USE

⟩ For previous riders, the key criteria for them to consider riding again are:
- o The end of the pandemic
- o Increased Muni service.

⟩ For those who have not ridden Muni in the past, the things that may get them to try Muni are:
- o (Better) Security
- o Increased Muni service
- o Improved vehicle cleanliness.

QUESTIONNAIRE

2021 Muni Satisfaction Survey

(Version 3.2. 8/17/21)

Introduction

a. Hello, this is _____with Corey Research. We are conducting an important survey for the City of San Francisco and we'd like to include your opinion on it if you are a resident. Do you live in San Francisco?
- o   Yes
- o   No / Refused   *(thank and discontinue)*

b. Are you eighteen years of age or older?
- o   Yes
- o   No / Refused   *(thank and discontinue)*

Ridership Questions

1. Before the pandemic, how often did you ride Muni? *(Read list as necessary)*
- o   5 days a week or more
- o   Several times a week
- o   About once a week
- o   2 to 3 times a month
- o   About once a month
- o   Less than once a month
- o   Did not ride at all   *(skip to Q2)*
- o   Don't Know/Refused *(Do not read; thank and discontinue)*

   Interviewer note: if asked, start of the pandemic is March 2020

1b. Which line or route did you ride most often (before the pandemic)?

   Route/Line: _____

2. Since the start of the pandemic, how often have you ridden Muni? *(Read list as necessary)*
- o 5 days a week or more
- o Several times a week
- o About once a week
- o 2 to 3 times a month
- o About once a month
- o Less than once a month
- o Do not / Did not ride at all   *(skip to Q3)*
- o Don't Know/Refused *(Do not read; thank and discontinue)*

Interviewer note: if asked, start of the pandemic is March 2020

2b. Which line or route do you currently ride most often?

Route/Line: _____

Programmer note: if do not ride in both Q1 and Q2, skip to Q18 and then to Non-Rider questions. If formerly rode but have not ridden since start of the pandemic, skip to Q4

Usage and Covid Questions

3. When you use Muni currently, what is the main purpose of your trips?
- o Work
- o School
- o Shopping
- o Eat out / Social / Recreation / Entertainment
- o Medical
- o Other (specify) _____
- o Don't know   *(Do not read)*

4. When the pandemic is over, do you think you will still ride Muni about the same, more often, or less often compared to before the pandemic?
   - o   Much more often
   - o   Somewhat more often
   - o   About the same   *(skip to Q6)*
   - o   Somewhat less often
   - o   Much less often
   - o   Will not ride Muni again *(Do not read)*
   - o   Don't know   *(Do not read, skip to Q6)*

5. Briefly, why do you say that?

_____

_____

_____

6. Do concerns about COVID-19 make you less likely to ride Muni right now?
   - o   Yes
   - o   Somewhat
   - o   No
   - o   Don't Know/Refused (Do not read)

Muni Ratings (current and former riders)

Note: the following questions serve to measure current and former rider satisfaction levels. Questions with an asterisk (*) will ONLY be asked of current riders

7. Overall, how would you rate Muni's service? Would you say…(read list)
   - o   Excellent
   - o   Good
   - o   Fair
   - o   Poor
   - o   Don't Know (Do Not Read)

Now I would like to ask about the specific performance in different areas. For each area I read, please tell me whether Muni does an excellent, good, fair, or poor job.
(Read to former riders) Please answer these questions based on how you think Muni is doing, even if you are not currently riding.
(Note: Program will randomize order of questions)

	Excellent - - - - - - - - - - - - - - Poor				DK
8, Providing reliability (on-time performance)	4	3	2	1	☐
9. Providing frequent service	4	3	2	1	☐
10. Cleaning Muni vehicles*	4	3	2	1	☐
11. Managing crowding*	4	3	2	1	☐
12. Helpful drivers/operators*	4	3	2	1	☐
13. Communicating with the public....................................	4	3	2	1	☐
14. Providing accurate arrival estimates*	4	3	2	1	☐
15. Trips taking a reasonable amount of time....................	4	3	2	1	☐
16. Providing access for people with disabilities	4	3	2	1	☐
17. Safety and security from crime while onboard or waiting for Muni	4	3	2	1	☐

_____

Muni Information

18. If you needed information about Muni, how would you obtain this information?
(Select all that apply)

    □ Check online (specify site): _____

    □ Use an app (specify app): _____

    □ Call 311 or use the 311 website

    □ Contact Muni via social media

    □ Ask a Muni driver/operator or Station Agent

    □ Visit the SFMTA Customer Service Center

    □ Ask a friend, coworker, or family member

    □ Other (specify): _____

    □ Don't know/refused (Do not read)

_____

Questions for Previous Riders Only

19. What mode(s) of transportation are you using now instead of Muni?
    □ Walk
    □ Carpool
    □ Drive
    □ Bicycle
    □ Other public transit (e.g. BART, SamTrans)
    □ Taxi
    □ Rail-hailing (Uber/Lyft)
    □ Scooter or skateboard (own)
    □ Scooter service (Lime/Spin/etc)
    □ Other (specify)
    □ I am no longer making the trip I did when I used Muni
    □ Don't know/refused

20. What would get you to consider riding Muni more in the future?

_____

Questions for Non-Riders

21. What would get you to consider using Muni for some of your trips in San Francisco?

_____

_____

_____

SFMTA Agency

(Ask all respondents these questions: riders, previous riders and non-riders)

22. The SFMTA (San Francisco Municipal Transportation Agency) is a City agency which oversees Muni, bike and pedestrian programs, taxis, as well as parking and traffic in the City. In general, how familiar are you with the SFMTA and its responsibilities….(read list)
   - Very Familiar
   - Somewhat Familiar
   - Not Too Familiar
   - Not at all Familiar
   - Don't know (do not read)

23. How satisfied are you with the job the SFMTA does managing transportation in San Francisco? (read list)
   - Very Satisfied
   - Somewhat Satisfied
   - Neither Satisfied nor Dissatisfied
   - Somewhat Dissatisfied
   - Very Dissatisfied
   - Don't know (do not read)

Demographic Questions

(generally follow SCARF Standards)

All three categories of survey participants (current riders, previous riders, and non-riders) will be asked to answer the following standardized demographic questions

24. What is your approximate age?
- o Under 18
- o 18 years old exactly
- o 19– 24
- o 25 – 34
- o 35 – 44
- o 45 – 54
- o 55 – 64
- o 65 – 74
- o 75 or over
- o Don't know/Refused (do not read)

25. What is your gender? (Read as necessary. Check one that best describes your current gender identity)
- o Female
- o Trans female
- o Male
- o Trans Male
- o Genderqueer / Gender Non-Binary
- o Not listed. Please specify): _____
- o Don't know/Refused (do not read)

26. What race and/or ethnicity do you identify with? Select all that apply; read list as necessary
- ☐ Asian
- ☐ Black and/or African American
- ☐ Hispanic, Latina, Latino, or Latinx
- ☐ Middle Eastern or North African
- ☐ Native American
- ☐ Pacific Islander
- ☐ White
- ☐ Another race or ethnicity (specify): _____
- ☐ Don't know/Refused (do not read)

27. What is the approximate annual income of everyone in your household?
   o Under $10,000
   o $10,000 to $25,000
   o $25,001 to $35,000
   o $35,001 to $45,000
   o $45,001 to $75,000
   o $75,001 to $100,000
   o J. $100,001 to $150,000
   o K. $150,001 to $200,000
   o N. $200,001 or more
   o Refused (do not read)

If necessary, add: We are not looking for a specific number - I have categories I can read to you.
If necessary, add: This is before taxes.

28. How many people are in your household? (type in number)
   Refused (do not read)
   Interviewer: Type in number of people in household. If don't know/refused, type in 99.

_____

29. For statistical purposes only, what is your home zip code? ___ ____ ____ ____ ____

Interviewer note: San Francisco ZIP codes all start with 941xx. If don't know/refused, type in 99999.

_____

Closing
30. And finally, for validation purposes, may I have your first name?

                    _____

Comments (optional): _____

_____

_____

Those are all the questions I have. Thank you very much for taking the time to complete the survey. Good-bye.

Rider Groupings
IF: Q2 = 1-6, then CURRENT RIDER
         Q1 = 1-6 BUT Q2 = 7, then PREVIOUS RIDER
         Q1= 7 and Q2= 7, then NON-RIDER