

**S.F. MUNICIPAL TRANSPORTATION
AGENCY**

RIDERSHIP SURVEY 2022
EXECUTIVE SUMMARY
QUESTIONNAIRE

prepared for
S.F. MUNICIPAL TRANSPORTATION AGENCY

compiled by
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EXECUTIVE SUMMARY

Ridership Survey 2022 - S.F. Municipal Transportation Agency

BACKGROUND

This project was a telephone and online survey conducted among adult San Francisco residents. A total of 533 interviews were conducted between August 5, 2022 to October 23, 2022. Interviews were conducted in English, Spanish, and Cantonese. The margin of error is +/-4.2%.

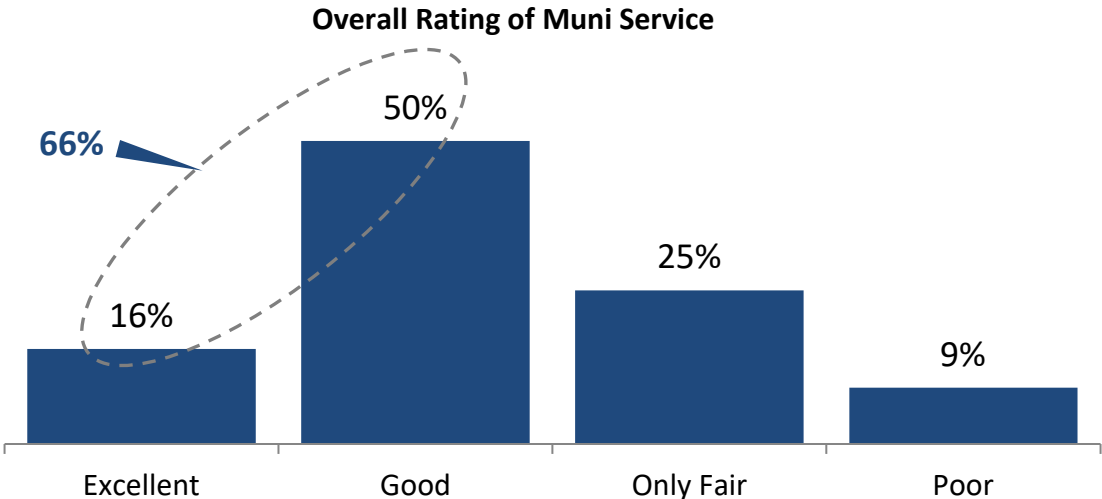
Some primary objectives of this survey include:

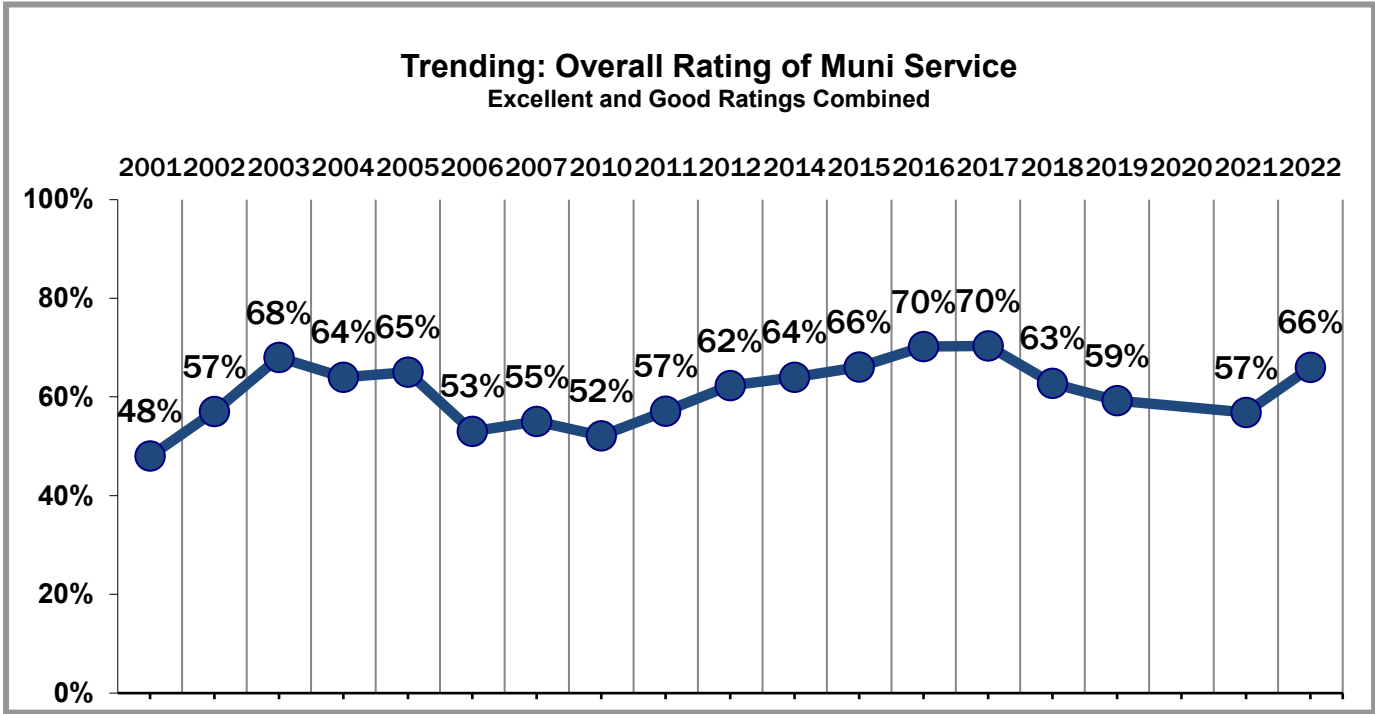
- Assess usage of Muni service
- Track trends in customer satisfaction
- Better understand key issues that drive overall customer satisfaction
- Identify barriers to using Muni

KEY FINDINGS

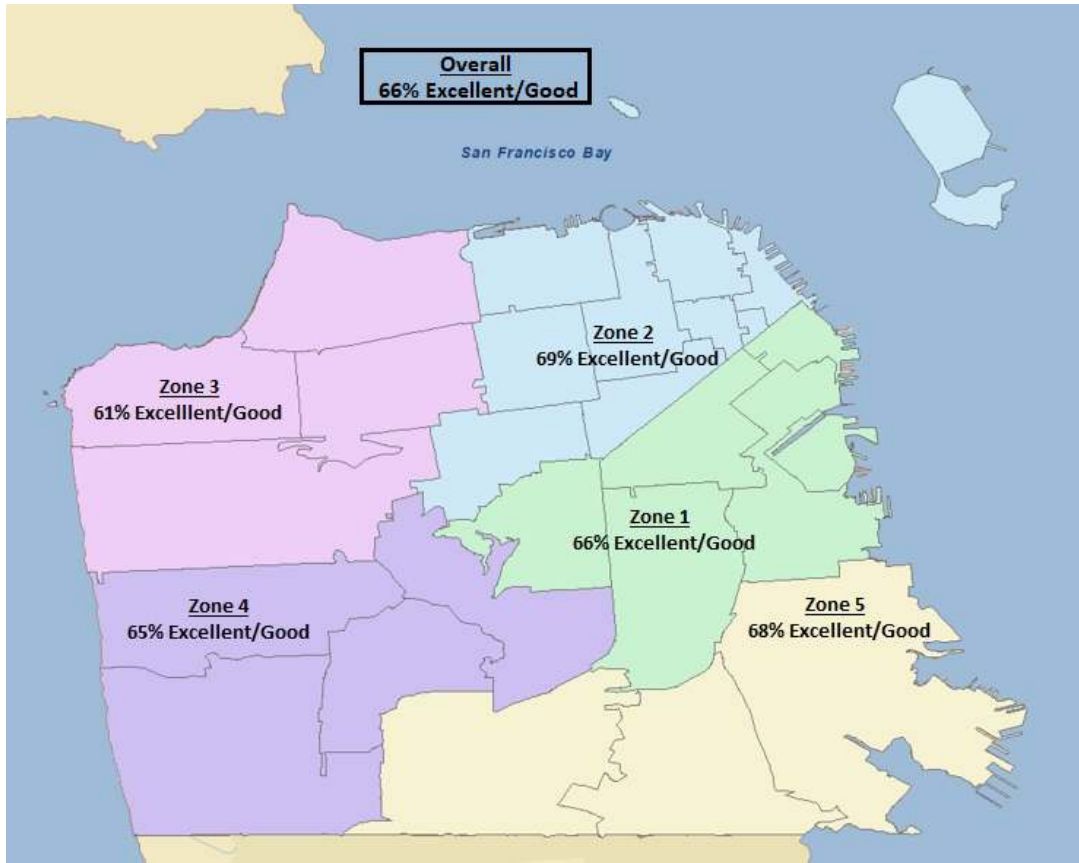
OVERALL RATING TREND

- Over half of respondents (66%) rate Muni service as excellent or good.
- Overall satisfaction among Muni riders has increased.





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 RATING – BY SUBGROUPS

- Riders who use Muni 5 days a week or more rate Muni higher than those 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.

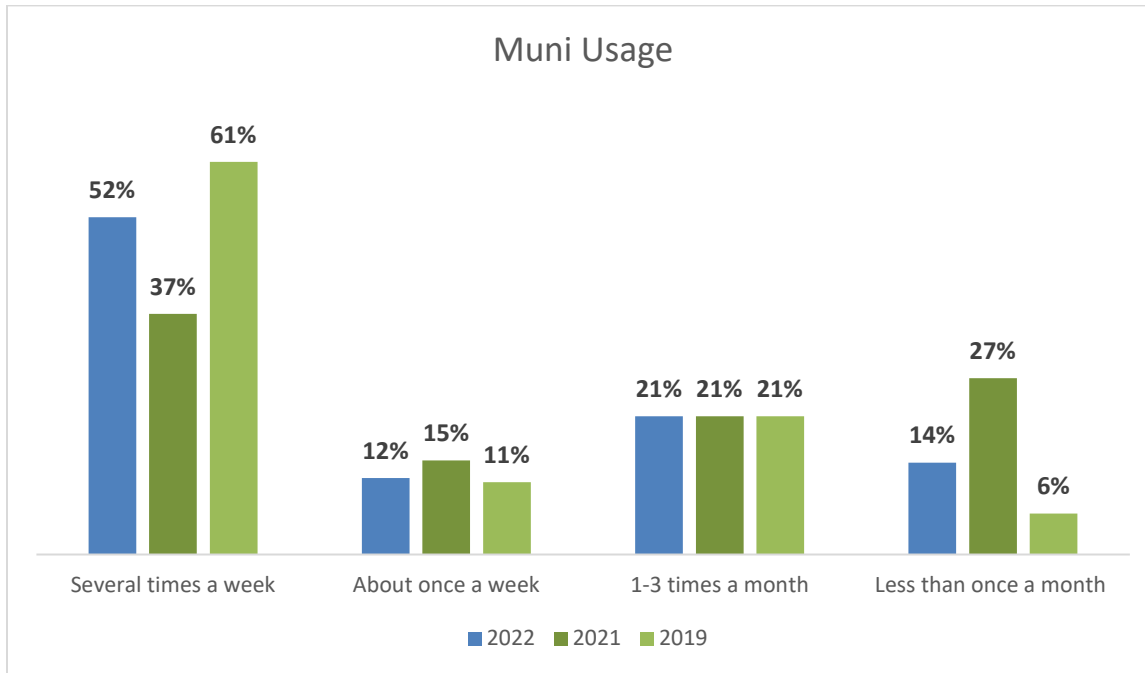
Satisfaction Rating by...	Excellent / Good	Fair	Poor
Total (all respondents) (n = 455)	66%	25%	9%
<u>Usage of Muni-Currently[^]</u>			
5 or more days/week (n = 93)	68%	24%	9%
Several times a week (n = 146)	65%	27%	8%
Once a week (n = 54).....	67%	26%	7%
Three times a month or less (n = 162).....	64%	25%	11%
<u>Trip Purpose</u>			
Work / School (n = 217)	61%	30%	9%
Personal Business (n = 28).....	71%	18%	11%
Other Purpose (n = 307)	68%	24%	8%
<u>Income</u>			
Less than \$25,000 (n = 37)	73%	14%	14%
\$25,000 - \$49,999 (n = 49)	80%	18%	2%
\$50,000 - \$74,999 (n = 62)	71%	19%	10%
\$75,000 - \$99,999 (n = 55)	67%	26%	7%
\$100,000 or more (n = 252).....	60%	30%	10%
<u>Household Size</u>			
1 person (n = 165)	72%	19%	9%
2 people (n = 145)	63%	24%	12%
3-4 people (n = 101).....	60%	36%	4%
5 or more people (n = 22)	73%	18%	9%
<u>Zone</u>			
1 (n = 89).....	66%	24%	10%
2 (n = 149)	69%	20%	11%
3 (n = 76).....	61%	30%	9%
4 (n = 85)	65%	29%	6%
5 (n = 50)	68%	26%	6%

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

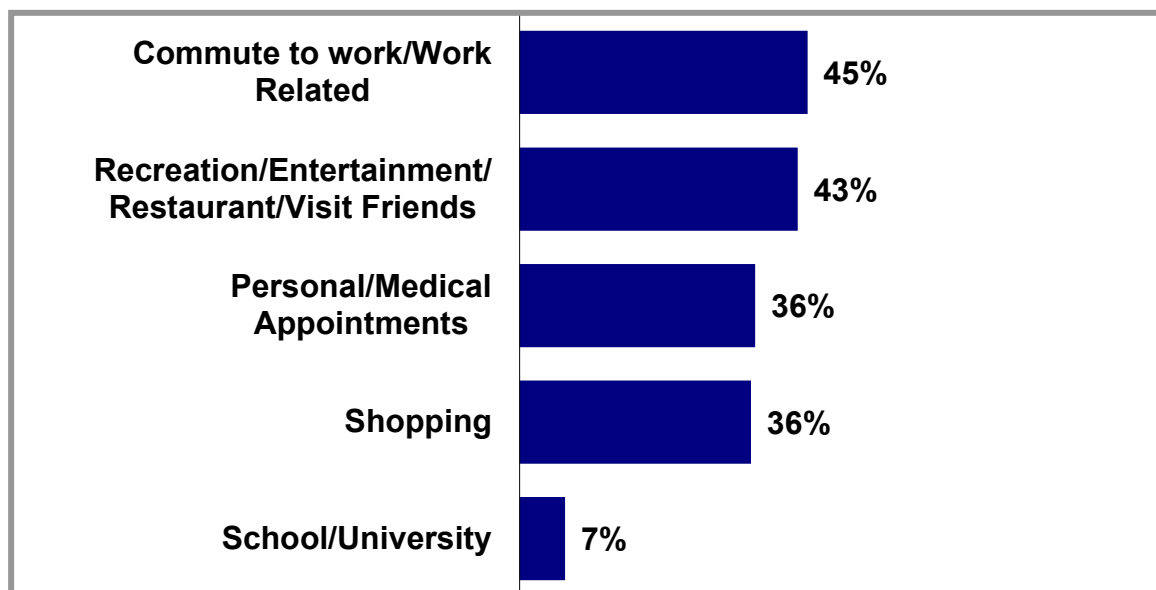
[^] Respondents who answered Q2 (“Since the start of the Pandemic, March 2020, how often have you ridden Muni”) between five days a week or more and less than once a week

USAGE OF MUNI

In 2022, nearly two-thirds (64%) of riders said they rode Muni at least once a week. This has increased since 2021 when just over half (52%) said they rode once a week but remains lower than 2019 when nearly three-quarters (72%) of riders rode at least once a week.



Nearly half (45%) of respondents are using Muni to commute to work, while another half (43%) are traveling to a recreation/restaurant destination. Just over one-third are using Muni to travel to conduct personal business/go to medical appointments. The same share (36%) are traveling to shop and 7% are traveling to school.



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



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 2021, individual attributes have generally increased or stayed the same. The greatest increases were *Trips take a reasonable amount of time* (65% in 2022 vs. 57% in 2021), *Frequency of service* (51% in 2022 vs. 45% in 2021), and *Reliability/On-time performance* (47% in 2022 vs. 42% in 2021). The only notable decrease was *Cleaning Muni vehicles* (57% in 2022 vs. 60% in 2021).

	(% saying <u>excellent</u> or <u>good</u>)		
	2022	2021	2019
Accessibility for persons with disabilities.....	81%	79%	71%
Operator (driver) helpfulness.....	73%	70%	66%
Trips take a reasonable amount of time	65%	57%	61%
Cleaning Muni vehicles^.....	57%	60%	49%
Frequency of service	51%	45%	50%
Communication with the public^^.....	51%	50%	48%
Accurate arrival estimates.....	49%	45%	50%
Reliability/On-time performance	47%	42%	44%
Safety and security from crime while onboard or . waiting for Muni*	42%	38%	-
Managing crowding on Muni vehicles	37%	38%	31%
Feeling safe & secure waiting at a Muni stop*.....	-	-	50%
Feeling safe & secure from crime on a Muni vehicle*	-	-	48%

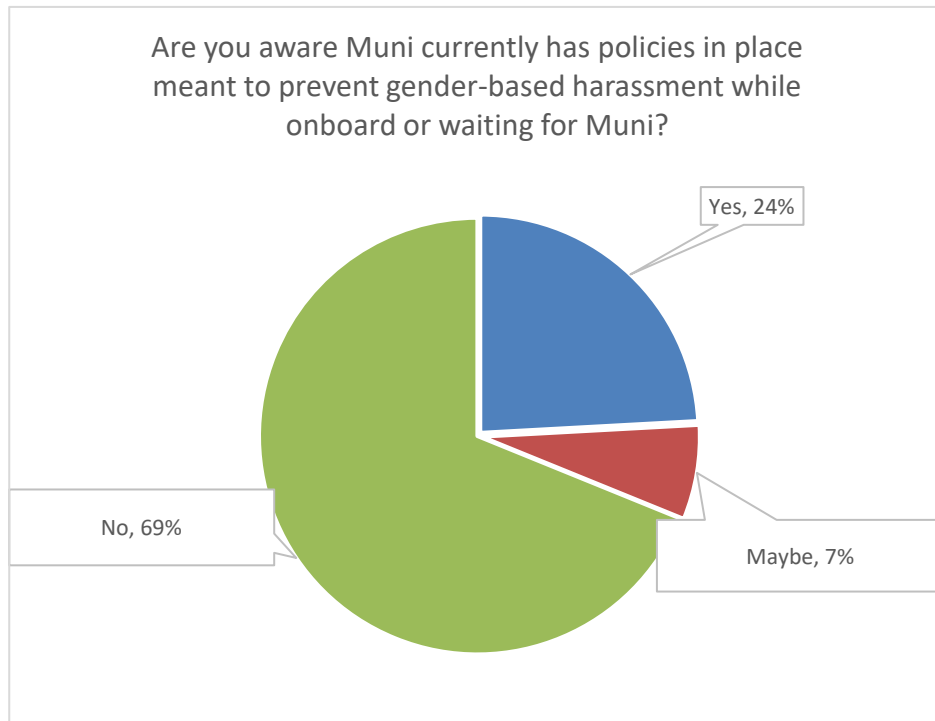
^ In 2019, this was phrased as "Vehicle cleanliness"

^^ In 2019, 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"

GENDER HARASSMENT

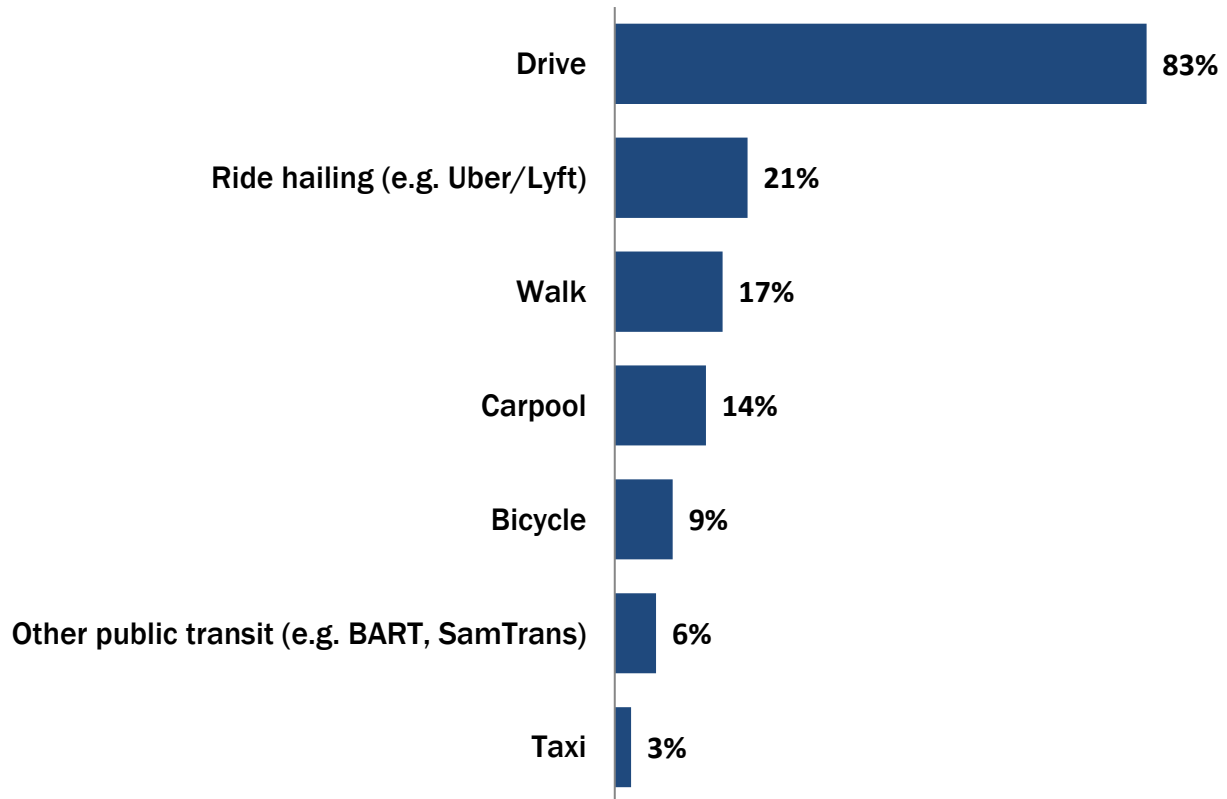
- While one quarter (24%) of riders are aware that Muni has policies to prevent gender-based harassment, over two thirds (69%) are not aware of these policies.



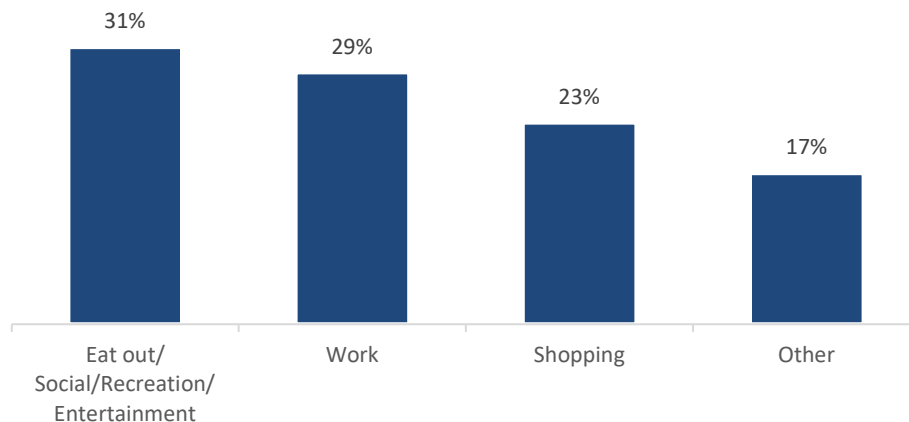
ALTERNATIVE MODE INSTEAD OF MUNI

- Most (83%) of respondents who had not used Muni in the past three years drive. Nearly a quarter (21%) of these riders use a ride hailing service, and 17% walk.
- Most of these trips were for either social/recreational trips (31%) or commuting (29%)

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



Think of a recent trip when you could have used Muni, but did not, what was the main purpose of your trips?



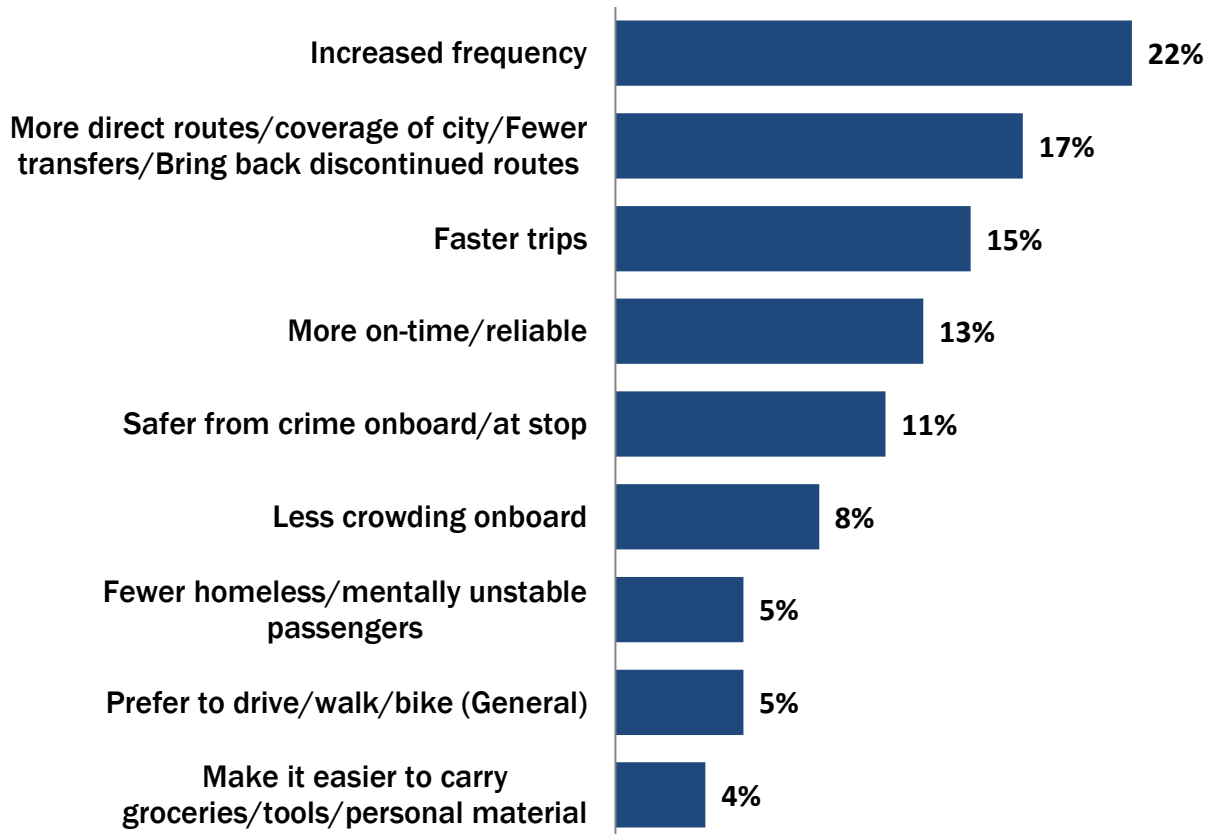
Note: More than one response was allowed.

Base – Have not ridden Muni in the past three years (n=77)

INCENTIVES FOR MUNI USE

- For respondents who have not used Muni in the past three years, the things that may get them to try Muni are:
 - Increased frequency
 - Better coverage of the City/Fewer transfers
 - Faster trips.

What could Muni do to get you to try transit for this type of trip?*

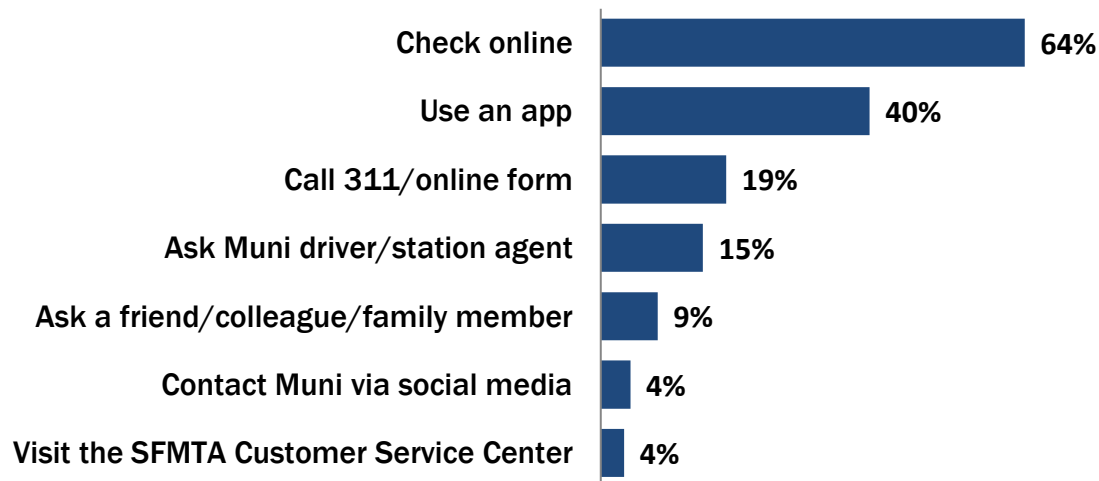


*Partial list, only responses 4% or greater overall are shown, see crosstabulated tables for complete list

INFORMATION SOURCES

- When looking for information about Muni, nearly two-thirds (64%) check online and 40% use an app.
- Three-quarters of respondents (74%) who check online use the SFMTA website. Over one-third (36%) who use an app use next bus/Umo and one-quarter(26%) use MuniMobile.
- Nearly two-thirds (60%) of respondents feel at least somewhat informed about Muni project, enhancements, or updates.

If you needed information about Muni, how would you obtain this information?*



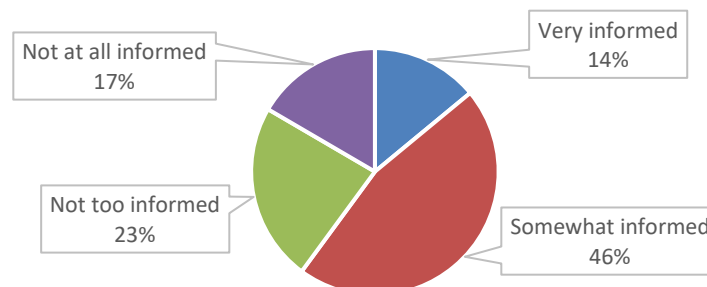
Online Sources

SFMTA Website.....	74%
Internet search.....	36%
Next Bus/Umo website.....	5%
Google Maps website.....	4%
511 Website.....	2%

App Sources*

Next Bus/Umo App.....	36%
MuniMobile.....	26%
Transit.....	17%
Google Maps app.....	14%
Routsey.....	11%

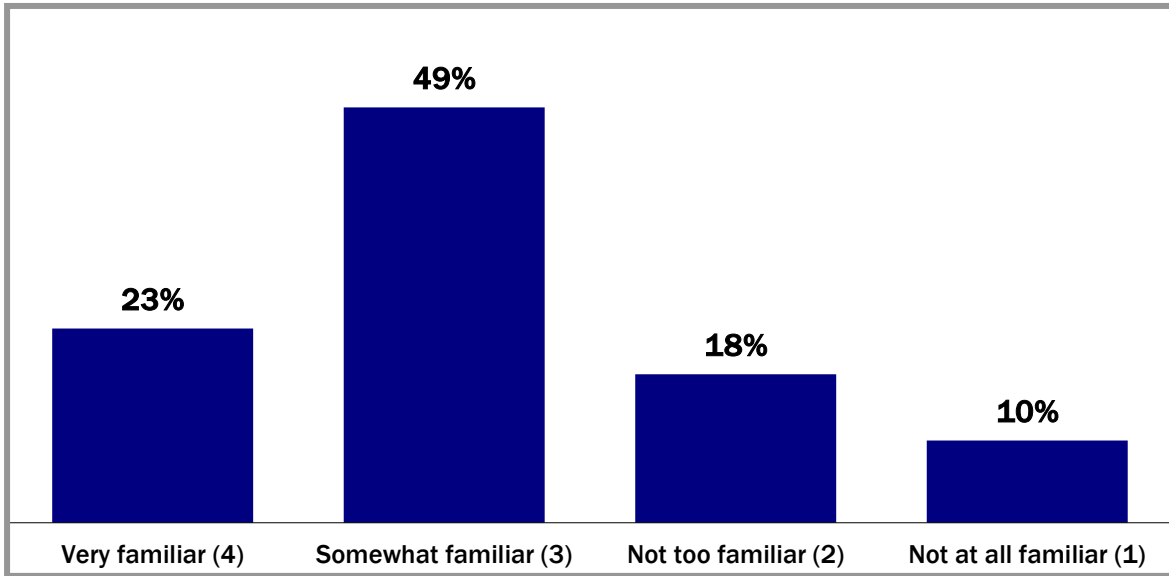
How informed do you feel about Muni projects, enhancements, and service updates?



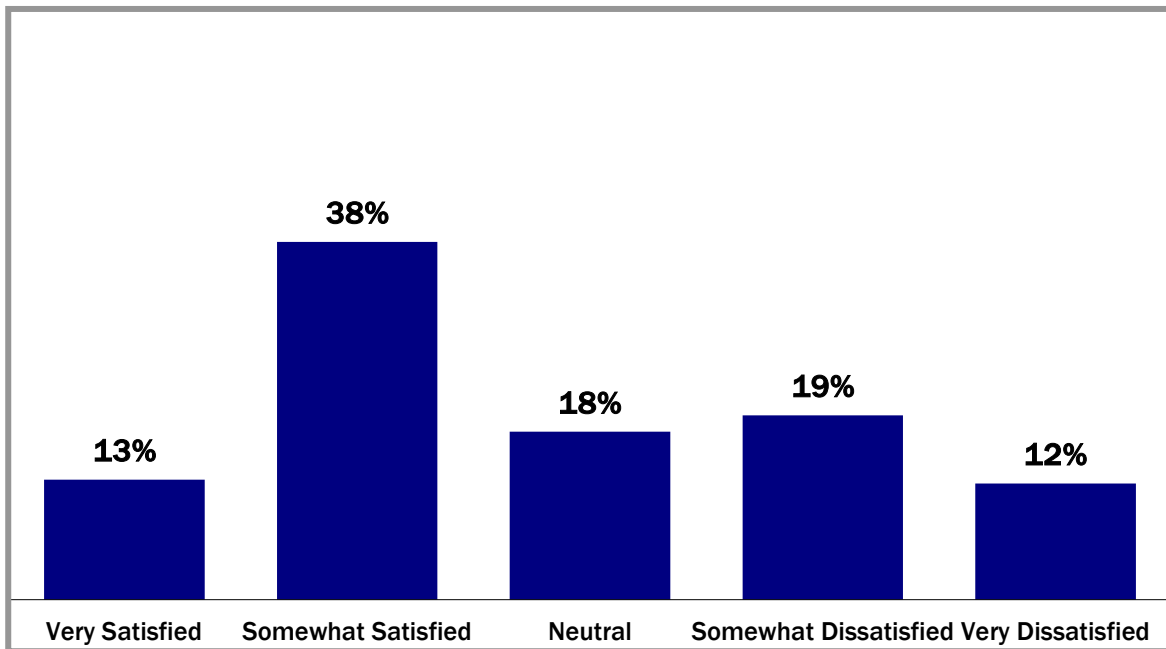
*Partial list, only responses 4% or greater overall are shown, see crosstabulated tables for complete list

SFMTA RESPONSIBILITIES

- In 2022, nearly three-quarters (73%) are very/somewhat familiar with the SFMTA and its responsibilities.
- Half of respondents (51%) were at least somewhat satisfied with SFMTA’s management of transportation in San Francisco.



How Satisfied Are You With The Job SFMTA Does With Managing Transportation In San Francisco?



QUESTIONNAIRE

2022 Muni Satisfaction Survey v2.2

Introduction:

1. Hello, this is _____ with Corey Research. We are conducting an important survey for the City of San Francisco. Do you live in San Francisco?

- Yes
- No *(thank and discontinue)*
- Don't Know / Refused *(thank and discontinue)*

2. Are you eighteen years of age or older?

- Yes
- No *(thank and discontinue)*
- Don't Know / Refused *(thank and discontinue)*

3. When is the last time you used Muni?

- Never *(skip to Question #19)*
- More than 3 years ago *(skip to Question #19)*
- About 1+ to 3 years ago
- Within the past year
- DK/Refused *(thank and discontinue)*

4. About how often do you ride Muni? *(READ LIST)*

- 5 days a week or more
- Several times a week
- About once a week
- 2 to 3 times a month
- About once a month
- Less than once a month
- Don't Know/Refused *(Do Not Read)* *(thank and discontinue)*

5. Which line or route do you ride most often?

Route/line: _____

6. When you use Muni, what is the main purpose of your trips?

- Work
- School
- Shopping
- Eat out / Social / Recreation / Entertainment
- Medical
- Other (specify) _____
- Don't know (*Do Not Read*)

7. Overall, how would you rate Muni's service? Would you say...(*Read List*)

- Excellent
- Good
- Fair
- Poor
- 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 a poor job.

Notes:

- *If necessary, 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*

8. Providing reliability / on-time performance

9. Providing frequent service

10. Cleaning Muni vehicles

11. Managing crowding on Muni vehicles

12. Helpful drivers / operators

13. Communicating with the public

14. Providing accurate arrival estimates

15. Trips taking a reasonable amount of time

16. Providing access for people with disabilities

17. Safety and security from crime while onboard or waiting for Muni

18. Are you aware Muni currently has policies in place meant to prevent gender-based harassment while onboard or waiting for Muni?

- Yes
 - Maybe
 - No
-

Question for **Non-Riders** Only

(Ask if Question #3 indicates respondent does not use Muni or has not used Muni in the past 3 years.)

19. What mode(s) of transportation are you using now instead of Muni? *(select all that apply)*

- Walk
 - Carpool
 - Drive
 - Bicycle
 - Other public transit (such as BART)
 - Taxi
 - Rail-hailing service (Uber/Lyft)
 - Scooter or skateboard (own)
 - Scooter service (Lime/Spin/etc)
 - Other (specify): _____
 - Don't know / refused
-

(Ask all respondents these following questions)

20. Think of a recent trip when you could have used Muni, but did not...

- A. What was the main purpose of this trip? (Read list if necessary)
- Work
 - School
 - Shopping

- Eat out / Social / Recreation / Entertainment
- Medical
- Other (specify) _____
- Don't know (do not read)

B. What could Muni do to get you to try transit for this type of trip?

21. If you needed information about Muni, how would you obtain this information?
(Read List. Select all that apply. For non-riders, ask "If you ever needed information...")

- Check online (specify site): _____
- Use an app (specify app): _____
- Call 311 or fill out an online form
- Contact Muni via social media
- Ask a Muni driver or Station Agent
- Visit the SFMTA Customer Service Center
- Ask a friend, colleague, or family member
- Other (specify): _____
- Don't know (Do not read)

22. How informed do you feel about Muni projects, enhancements, and service updates? A few examples would be service changes, Muni Forward, capital improvement projects as well as other projects and efforts. Would you say...*(Read List)*

- Very Informed
- Somewhat Informed
- Not Too Informed
- Not at all Informed
- Don't know *(Do Not Read)*

23. 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*)

24. 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 categories of survey participants (riders and non-riders) will be asked to answer the following standardized demographic questions, which generally follow SCARF Standards.

These last few questions are to ensure we've interviewed a broad mix of San Francisco residents.

25. What is your age?

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

26. What is your gender? *(Read list. Check one that best describes your current gender identity)*

- Female
- Trans female
- Male
- Trans Male
- Genderqueer / Gender Non-Binary
- Not listed. Please specify): _____
- Don't know / Refused *(Do Not Read)*

27. What race and/or ethnicity do you identify with? *(Select all that apply)*

- Asian
- Black and/or African American
- Hispanic and/or Latina, Latino, or Latinx
- Middle Eastern and/or North African
- Native American
- Pacific Islander
- White
- Another race or ethnicity (specify): _____
- Don't know / Refused *(do not read)*

28. What is the approximate annual income of everyone in your household?

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

- Less than \$10,000
- \$10,000 to \$25,000
- \$25,001 to \$35,000
- \$35,001 to \$45,000
- \$45,001 to \$75,000
- \$75,001 to \$100,000
- J. \$100,001 to \$150,000
- K. \$150,001 to \$200,000
- N. \$200,001 or more
- O. Don't know / Refused *(do not read)*

29. How many people are in your household?

- 1
- 2
- 3

- 4
 - 5
 - 6
 - 7
 - 8
 - 9
 - 10
 - Don't know / Refused (do not read)
-

30. 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

31. And 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.