



SFMTA
Municipal Transportation Agency

Muni On-Board Customer Survey

03 | 14 | 2014

SAN FRANCISCO, CALIFORNIA



2013 Customer Survey

- SFMTA completed a multilingual on-board survey of **over 22,000 customers** in 2013
- Survey statistically significant at the route level and across routes by time of day
- Supplemental surveying planned for some routes (e.g., combined corridors like the 14/14L)
- Survey results to be used to evaluate the equity of service frequency and route changes for Title VI and other purposes



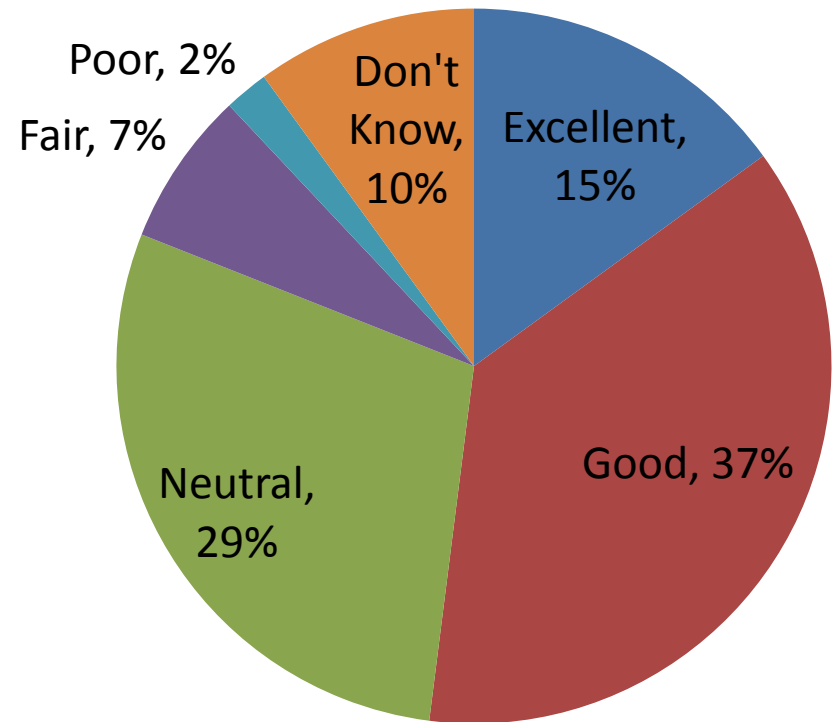
2013 Customer Survey

- Survey consulting firm Corey, Canapary, and Galanis Research hired to conduct a comprehensive on-board customer survey
- Surveyors rode buses and trains and distributed surveys to customers on buses and trains on all Muni routes
- Survey provided in English, Chinese & Spanish
- Professional multi-lingual surveying staff used to maximize response rate



Overall Service Experience Rating

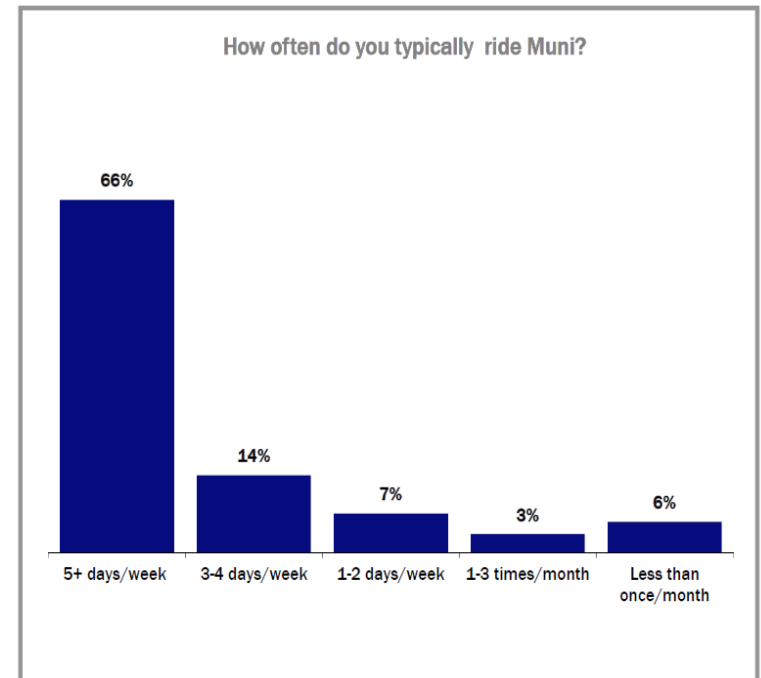
- 52% of customers surveyed rated Muni service overall as good or excellent
- Customers were most satisfied by the frequency of service and least satisfied with on-time performance





Who are Muni Customers

- Most customers use Muni regularly
- The majority of trips are not to work
 - 42% using Muni to access work
 - 22% using Muni for social/recreation/entertainment destinations
 - Other key destinations include school, errands, and shopping



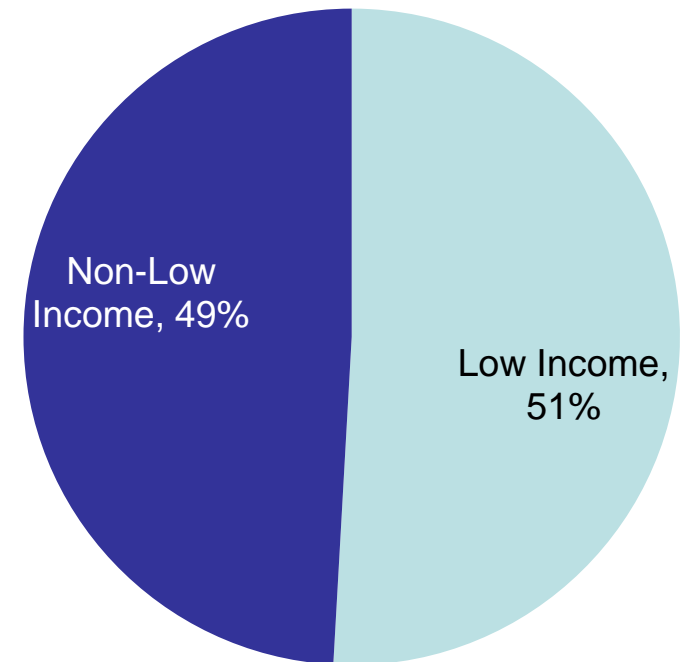


Who are our customers?

Income

- 31% of SF residents are low-income (2010 U.S. Census) yet 51% of Muni customers report living in low-income households
- SFMTA defines low income as a household earning less than 200% of the federal poverty level
 - Less \$47,000/year for a family of four

Customer Income



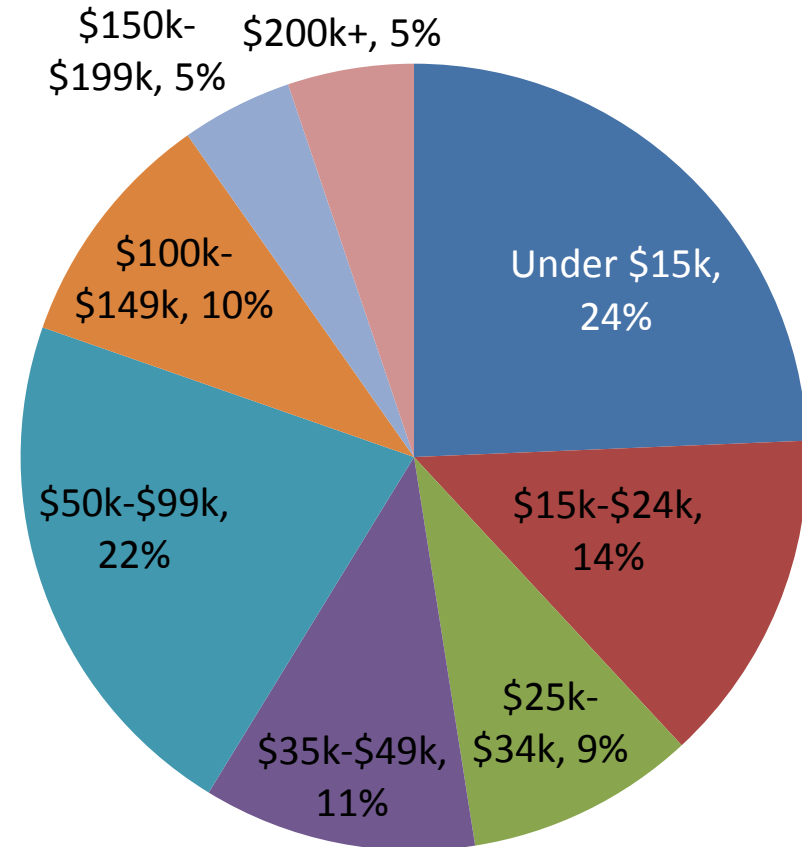


Who are our Customers?

Income

- Muni is critical to low-income customers
- Over 60% of customers below the City's Average Median Income of approximately \$71,000
- Approximately 1 in 4 customers reported living in households making less than \$15,000 annually
- 53% of customers also reported not owning or having access to a vehicle

Annual Household Income (All households)



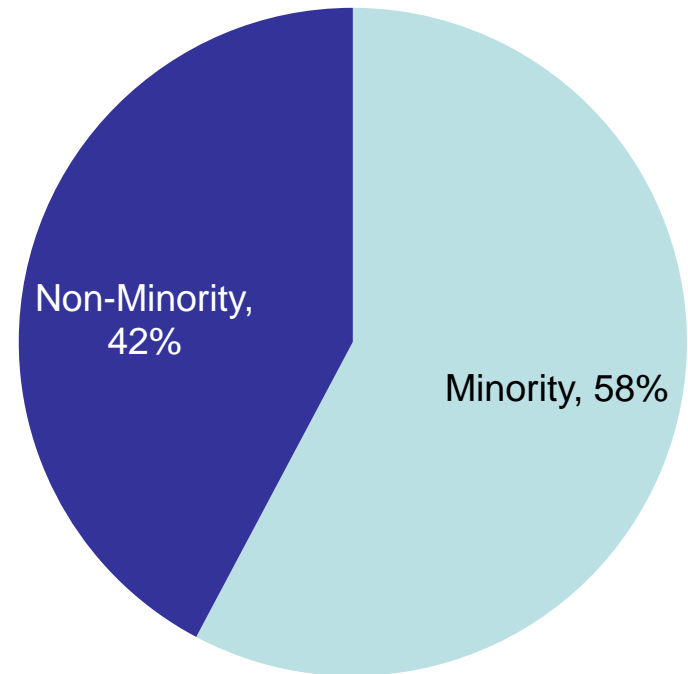


Who are our customers?

Minority & Non-Minority

- 58% of our customers self-identify as a minority
- Same as our citywide average according to the 2010 United States Census

Customer Demographics

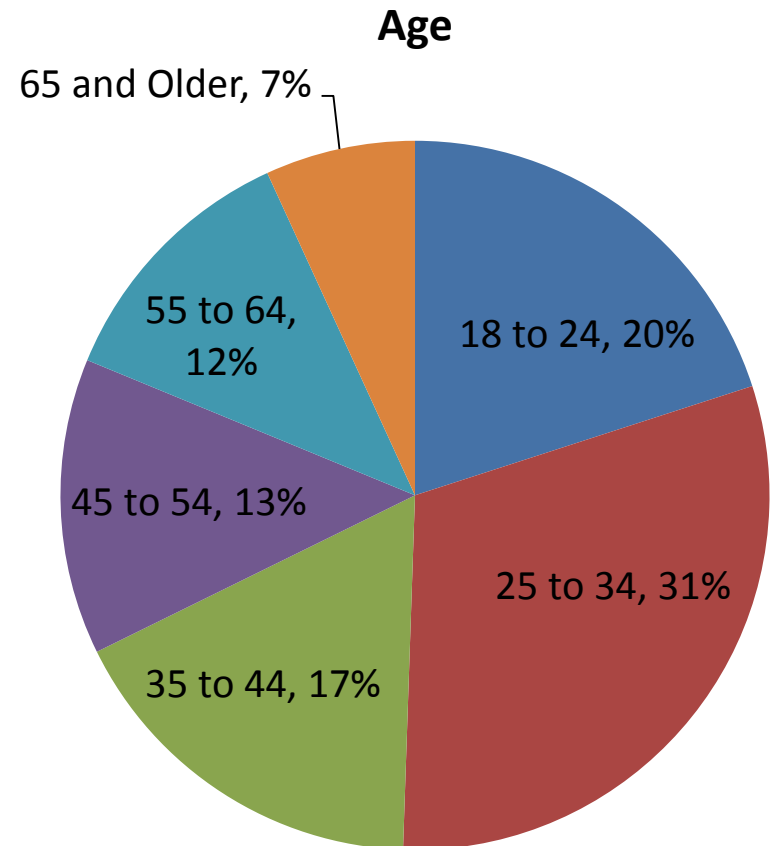




Who are our Customers?

Age

- Large majority of customers between the ages of 18 and 54
- Customers 55 and older account for almost 20% of Muni customers





Who are our customers?

Access and Payment

- 74% of customers walk to access Muni
- 20% of customers reported having to transfer from another Muni route
- Clipper usage is high
 - 65% used a Clipper Card with either a monthly pass (43%) or as Clipper cash (22%)
- 22% of customers paid with cash
 - Cash use is higher among low income customers
- Other pass types reported were Muni Passports, Transfers, Single Fare Tickets, and the Lifeline Pass among others



Minority and Low Income Routes

- Data being used to determine which routes serve highest proportions of minority and low income customers

Line	% Minority Customers
RAPID	
8X Bayshore Express	84%
9 San Bruno	77%
14 Mission	76%
LOCAL	
54 Felton	92%
44 O'Shaughnessy	75%
29 Sunset	74%
COMMUNITY/CIRCULATOR	
56 Rutland	94%
67 Bernal Heights	66%
17 Parkmerced	68%
Customer Average	58%
Citywide Average	58%

Line	% Low Income Customers
RAPID	
14 Mission	78%
9 San Bruno	75%
8X Bayshore Express	71%
LOCAL	
54 Felton	79%
108 Treasure Island	75%
29 Sunset	71%
COMMUNITY/CIRCULATOR	
56 Rutland	87%
66 Quintara	63%
17 Parkmerced	63%
Customer Average	51%
Citywide Average	31%



TEP Service Plan Preliminary Results

- Data being used to assess impact of TEP service changes on customers
- TEP Increased Frequency Proposals
 - 59% of benefiting customers are minority and 51% are low income



Summary & Next Steps

- Muni provides critical transportation to low income and minority customers and customers without access to a vehicle
 - Over half of our customers do not have access to a vehicle
 - Over 60% of our customers have household incomes below the average median household income
- Work underway to use survey data for:
 - Annual performance monitoring to better understand equity needs on a neighborhood basis
 - Evaluation of service and fare change proposals



Questions & Comments