

Presentation:

# **2019 Travel Decision Survey**

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

By: Monica Munowitch, Complete Streets Section Manager

## 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

## Methods Update

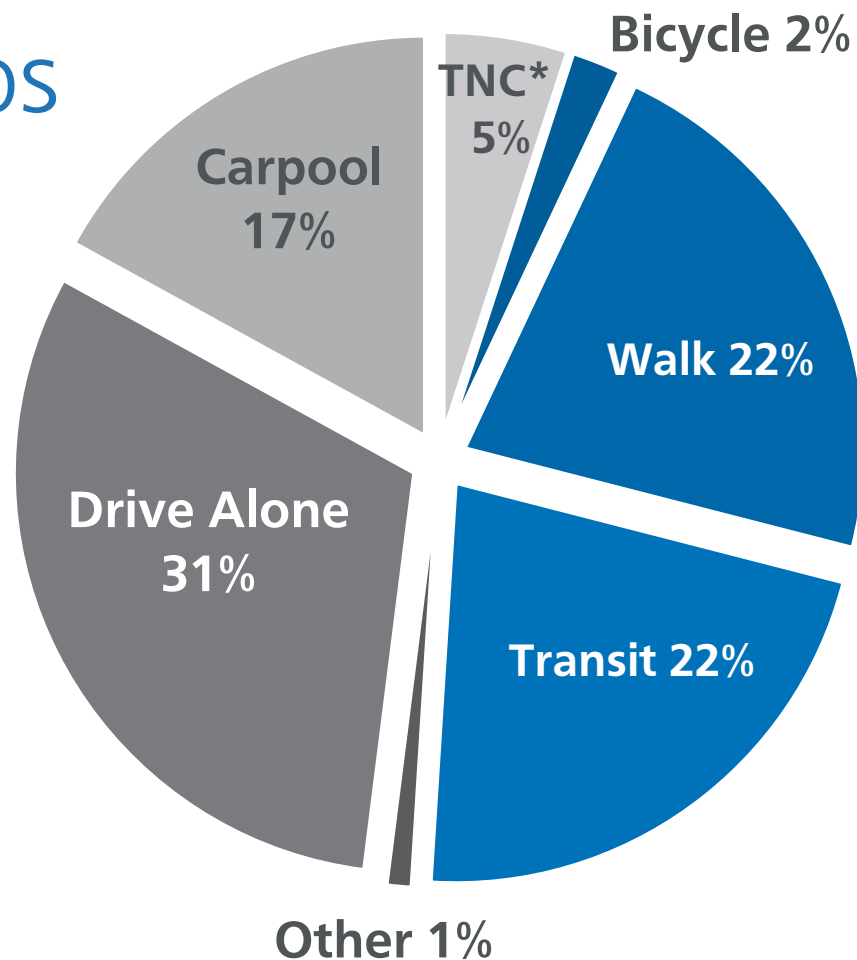
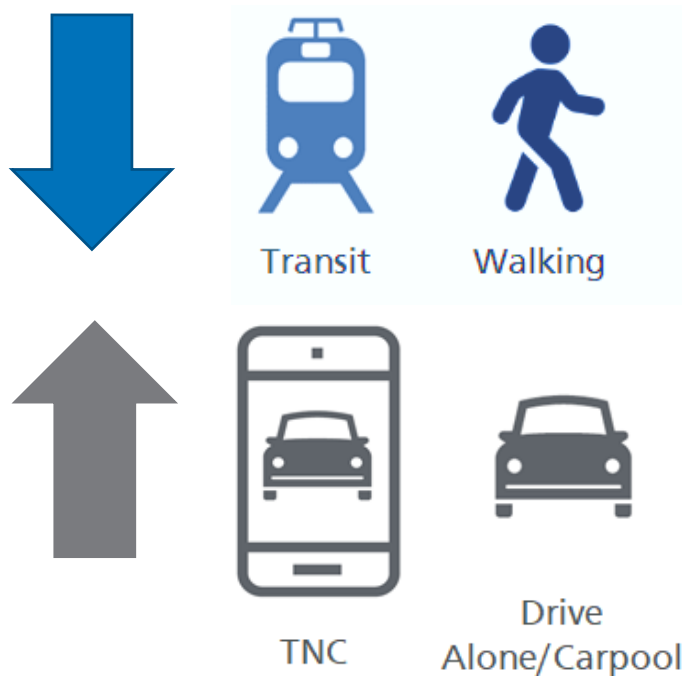
Between 2017 and 2019 to align with the Strategic Plan, trip categorization changed - *Transportation Network Companies (TNCs) categorized as non-sustainable.*

2017	2019
<b>Private:</b> <ul style="list-style-type: none"><li>• Drive Alone</li><li>• Carpool/drive with others</li></ul>	<b>Non-Sustainable:</b> <ul style="list-style-type: none"><li>• Drive alone</li><li>• Carpool/drive with others</li><li>• <b>TNC</b></li></ul>
<b>Non- Private:</b> <ul style="list-style-type: none"><li>• Walk</li><li>• Transit</li><li>• Bike</li><li>• Other (taxi, carshare)</li><li>• <b>TNC</b></li></ul>	<b>Sustainable:</b> <ul style="list-style-type: none"><li>• Walk</li><li>• Transit</li><li>• Bike</li><li>• Other (taxi, carshare)</li></ul>

2019 Travel Decision Survey  
**Mode Share 2019**

# 47% Sustainable Trips

Over last 2 years (since 2017):

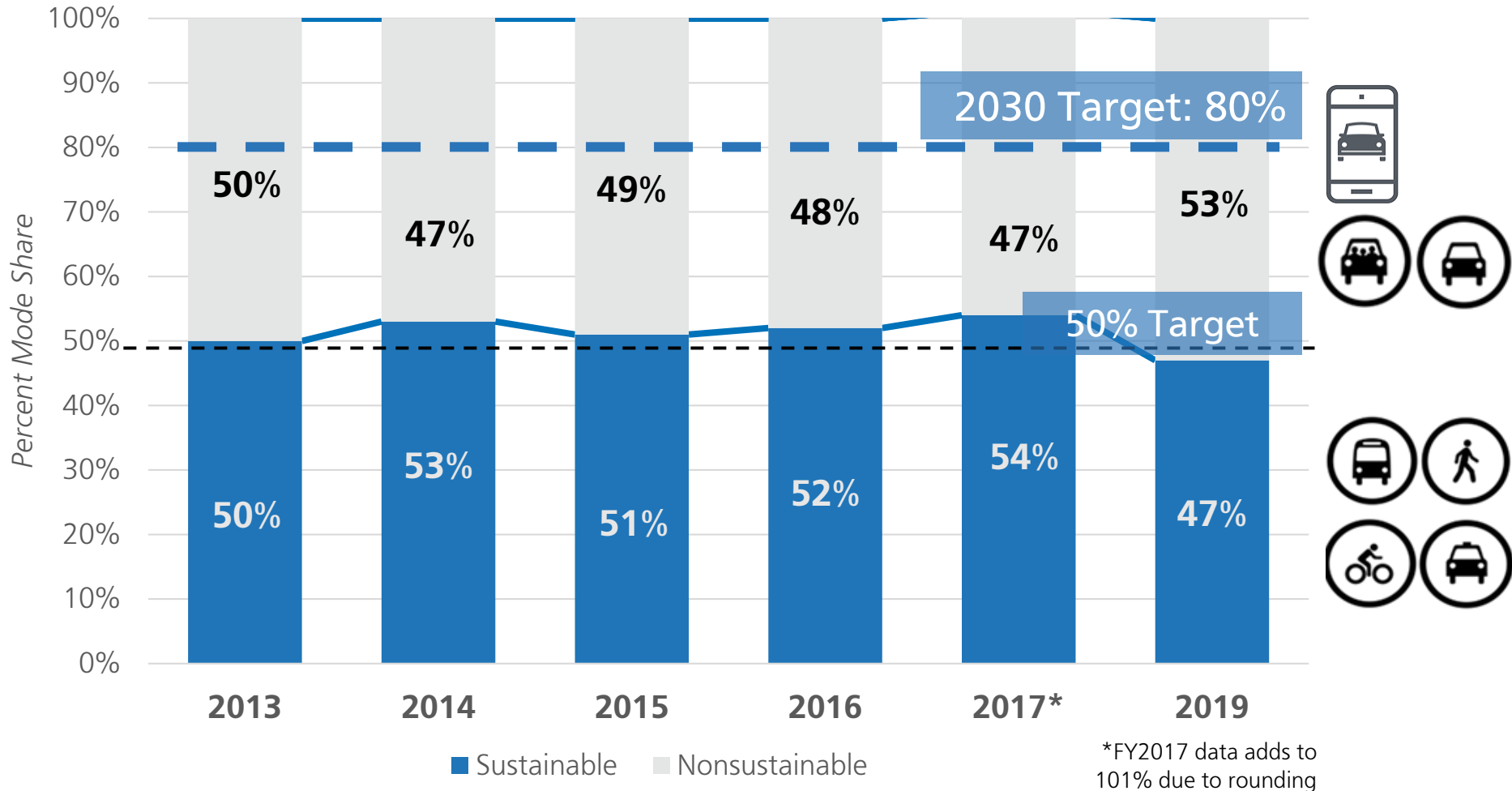


\*Transportation Network Company

## 2019 Travel Decision Survey

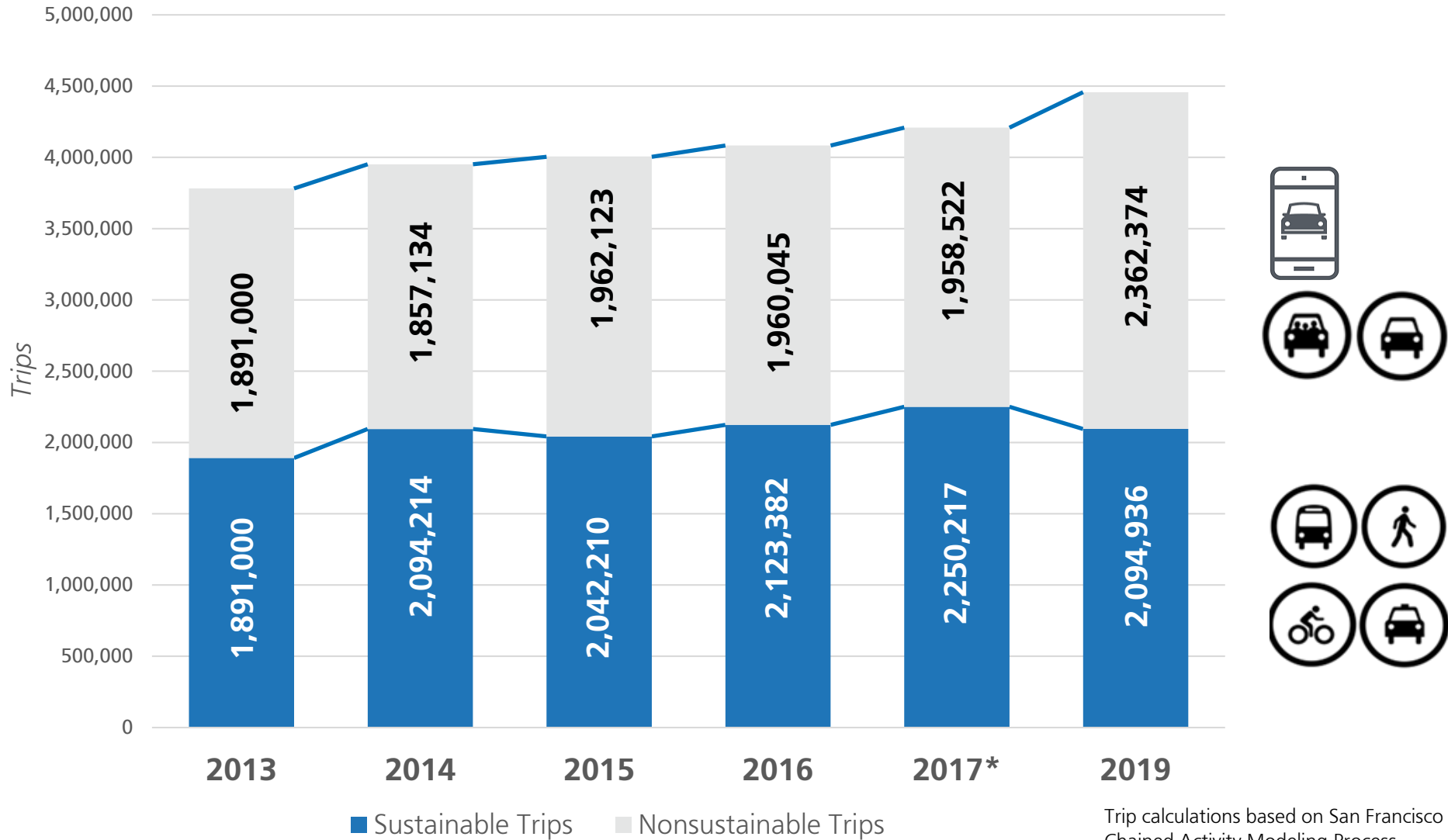
# Percent Mode Share: 2019 Categorization

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



# 2019 Travel Decision Survey

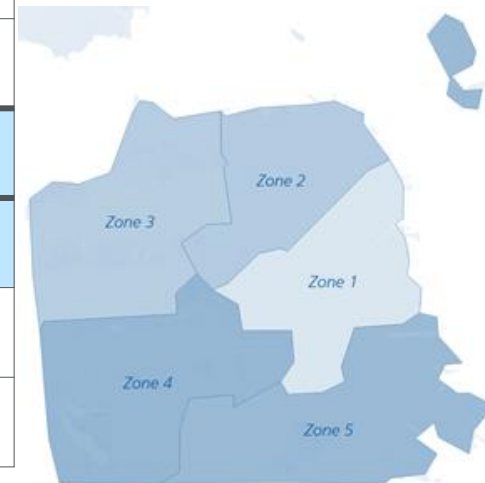
## Raw Trips: 2019 Current Categorization



# 2019 Travel Decision Survey

## Income & Sustainable Mode Use

	\$35,000 or less	\$35,001-\$75,000	\$75,001-\$100,000	\$100,001-\$200,000	Over \$200,000	Total
<b>San Francisco</b>	<b>59%</b>	<b>51%</b>	<b>46%</b>	<b>43%</b>	<b>44%</b>	<b>47%</b>
Zone 1	77%	44%	34%	59%	64%	59%
Zone 2	58%	78%	61%	54%	40%	55%
Zone 3	72%	21%	58%	35%	46%	43%
Zone 4	43%	47%	37%	19%	32%	33%
Zone 5	49%	34%	17%	34%	23%	35%
<b>Outside San Francisco</b>	<b>43%</b>	<b>51%</b>	<b>61%</b>	<b>48%</b>	<b>54%</b>	<b>51%</b>
East Bay	50%	48%	68%	61%	68%	60%
North Bay	15%	79%	49%	41%	44%	44%
South Bay	39%	55%	22%	29%	39%	38%

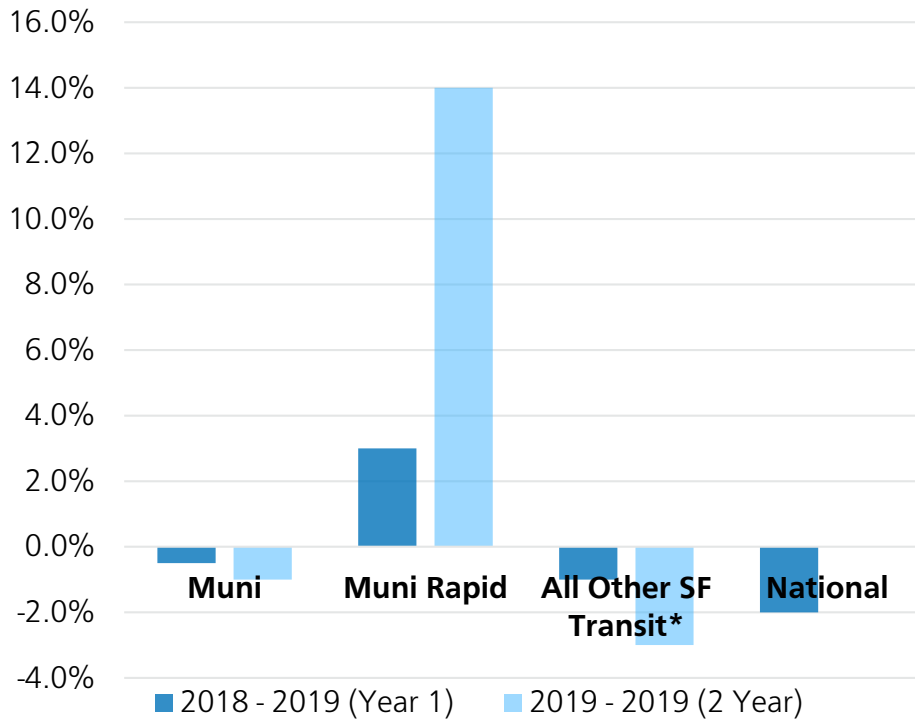


\*shaded cells indicate populations where sustainable mode share is above 50%

# 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.



\*BART + Caltrain + AC Transit + Golden Gate, Bay Ferry



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.



## 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