



**SFMTA**

San Francisco Municipal Transportation Agency

# SFMTA Community Survey

SFMTA Board of Directors

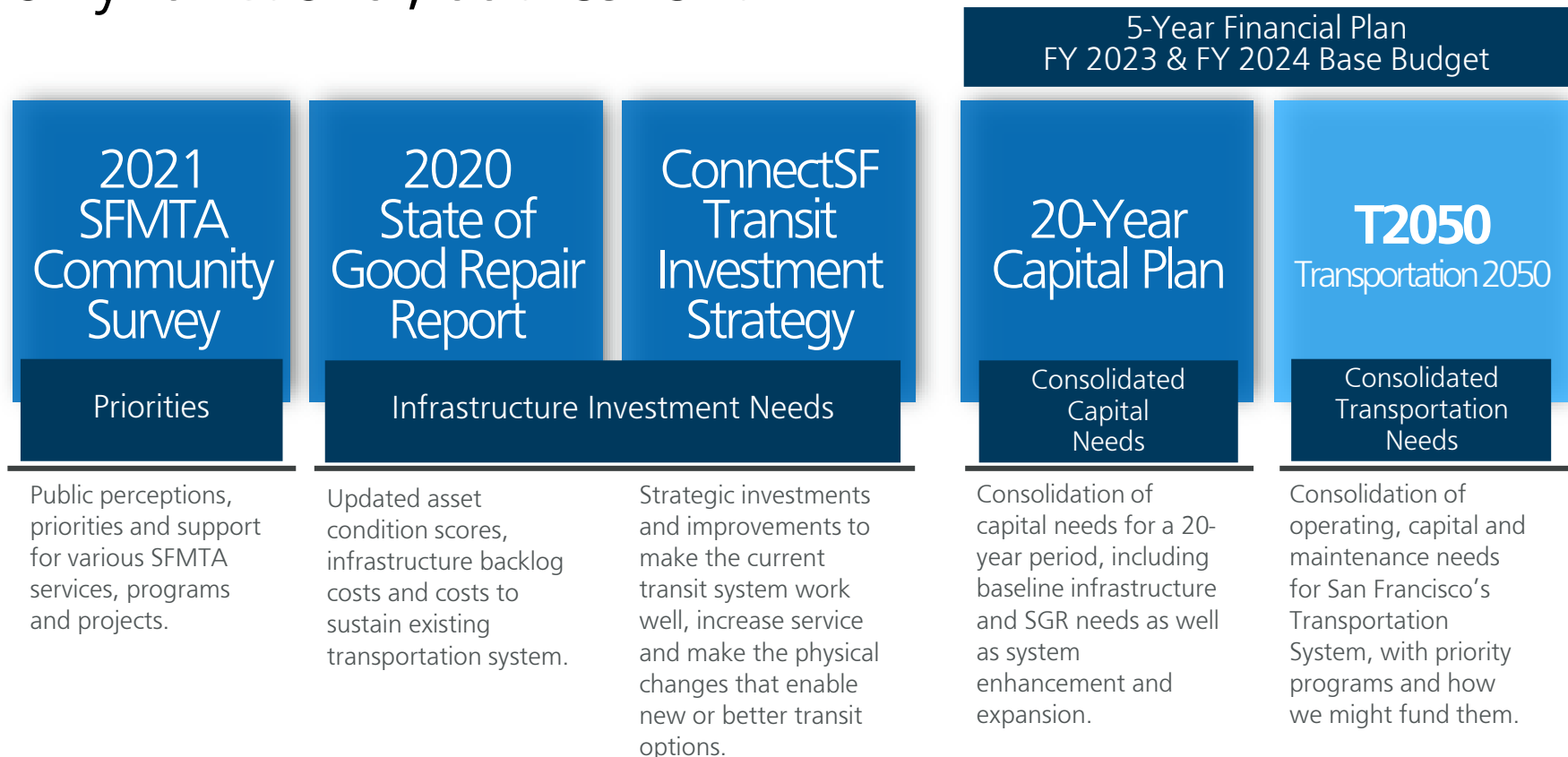
June 15, 2021

## Introduction

- In February 2021, the SFMTA Board as part of the annual Board of Directors workshop participated in a prototype prioritization exercise.
- Feedback from that process was that additional community opinions and data were needed on the various programs and projects as part of the exercise.
- The best way to solicit this feedback was through a consultant led survey process on the SFMTA's services and project priorities as well as how much support the agency has.
- As the SFMTA looks to expand service and support the re-opening of the City, this data is one of many sources that will support tradeoffs and decision making.

## Decisions Supported by Data

Over the summer, we will present a wide array of data on what will be needed to restore and expand service and ensure that the City's transportation infrastructure is not only functional, but resilient.



## Decisions Supported by Data

Two additional surveys will be completed between now and the end of the calendar year which will also provide the Board data for the development of the upcoming Consolidated Budget and 5-Year Capital Improvement Program

### Travel Decision Survey

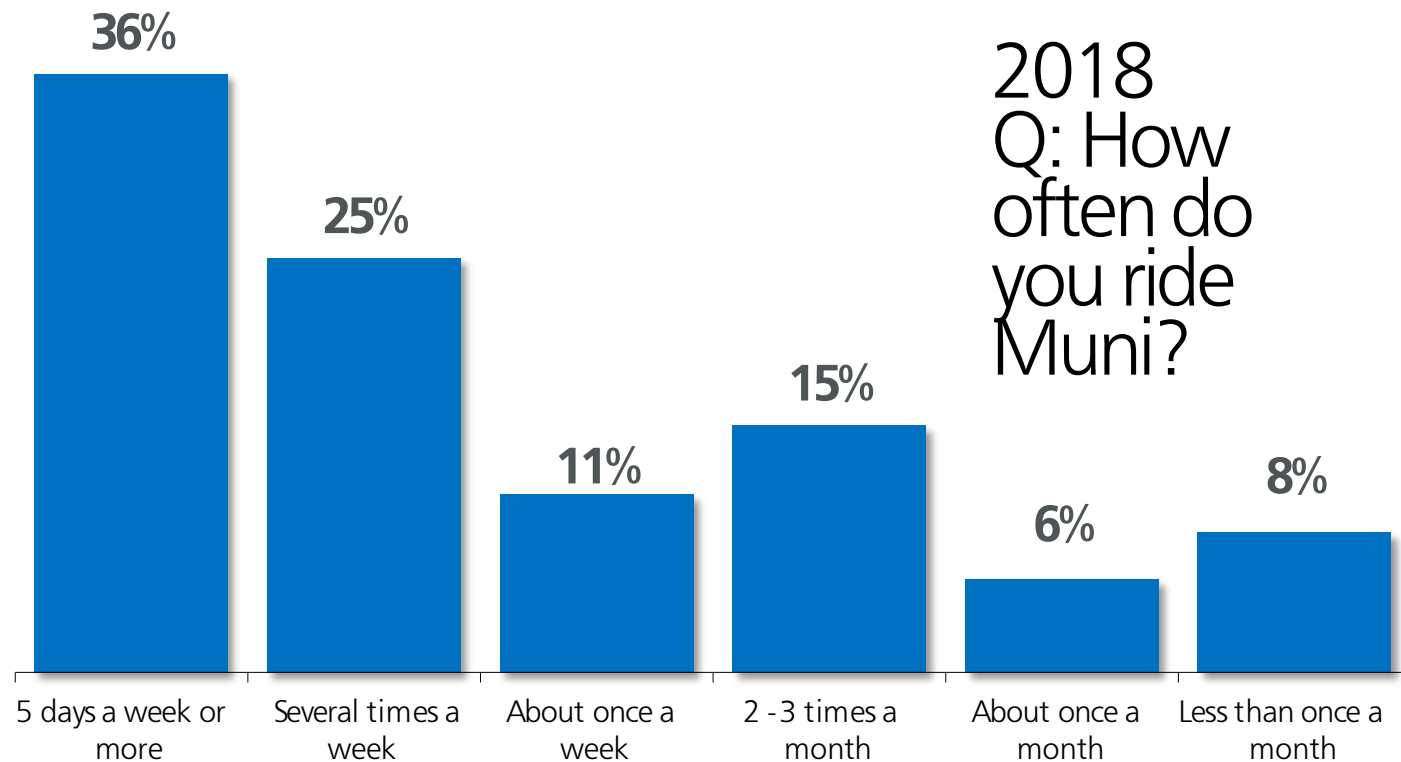
Modal and trip choices. Track modal trends, to support meeting modal and climate goals.

### Muni Rider Survey

Muni Rider satisfaction tracking usage of Muni service and understand key issues that drive overall customer satisfaction as well as barriers to using Muni

## Baseline - 2018 Muni Rider Survey Data

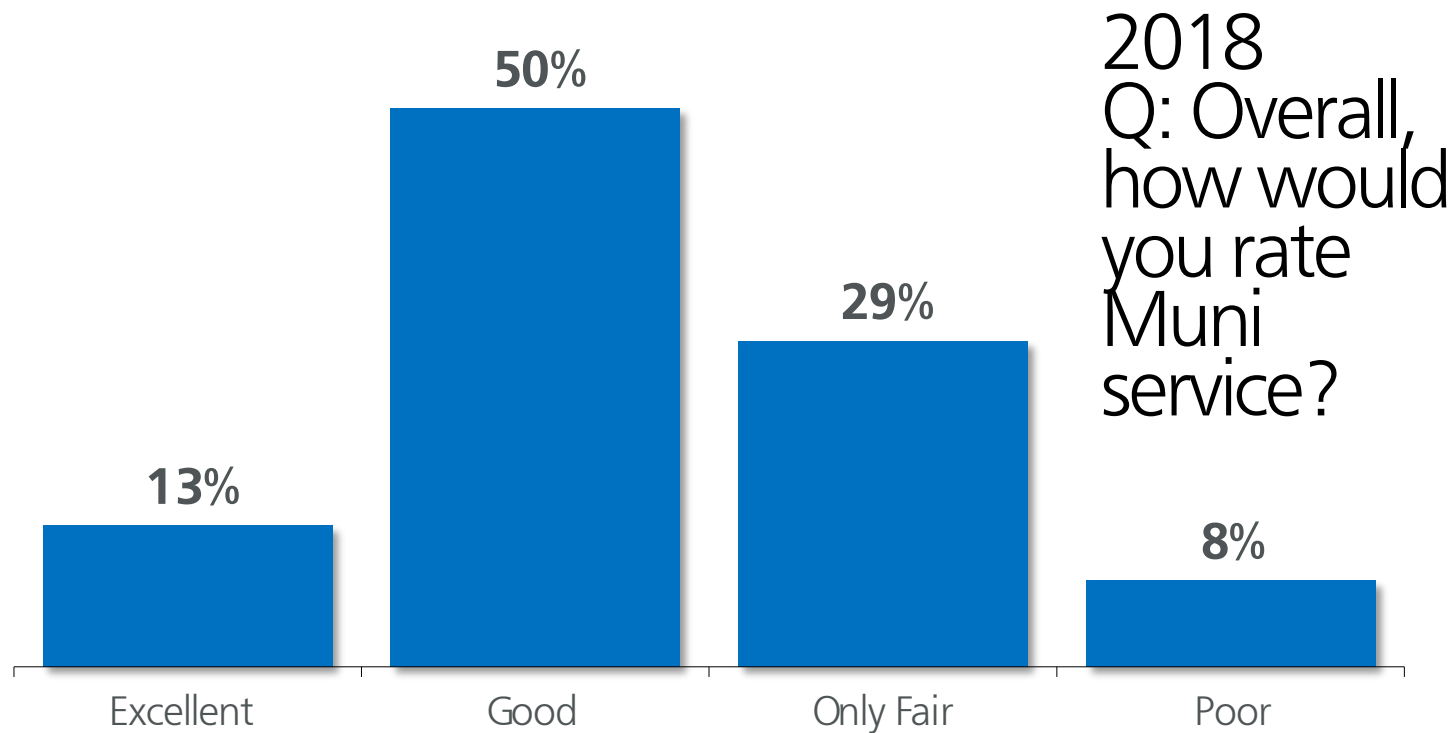
Prior to the pandemic, 61% of riders rode Muni regularly.



Source: 2018 Muni Rider Survey, prepared by COREY, CANAPARY & GALANIS RESEARCH  
[https://www.sfmta.com/sites/default/files/reports-and-documents/2018/12/12-18-18\\_item\\_11\\_muni\\_rider\\_survey\\_2018.pdf](https://www.sfmta.com/sites/default/files/reports-and-documents/2018/12/12-18-18_item_11_muni_rider_survey_2018.pdf)

## Baseline - 2018 Muni Rider Survey Data

Prior to the pandemic, 63% of riders rated the quality of the service as “excellent” or “good”.



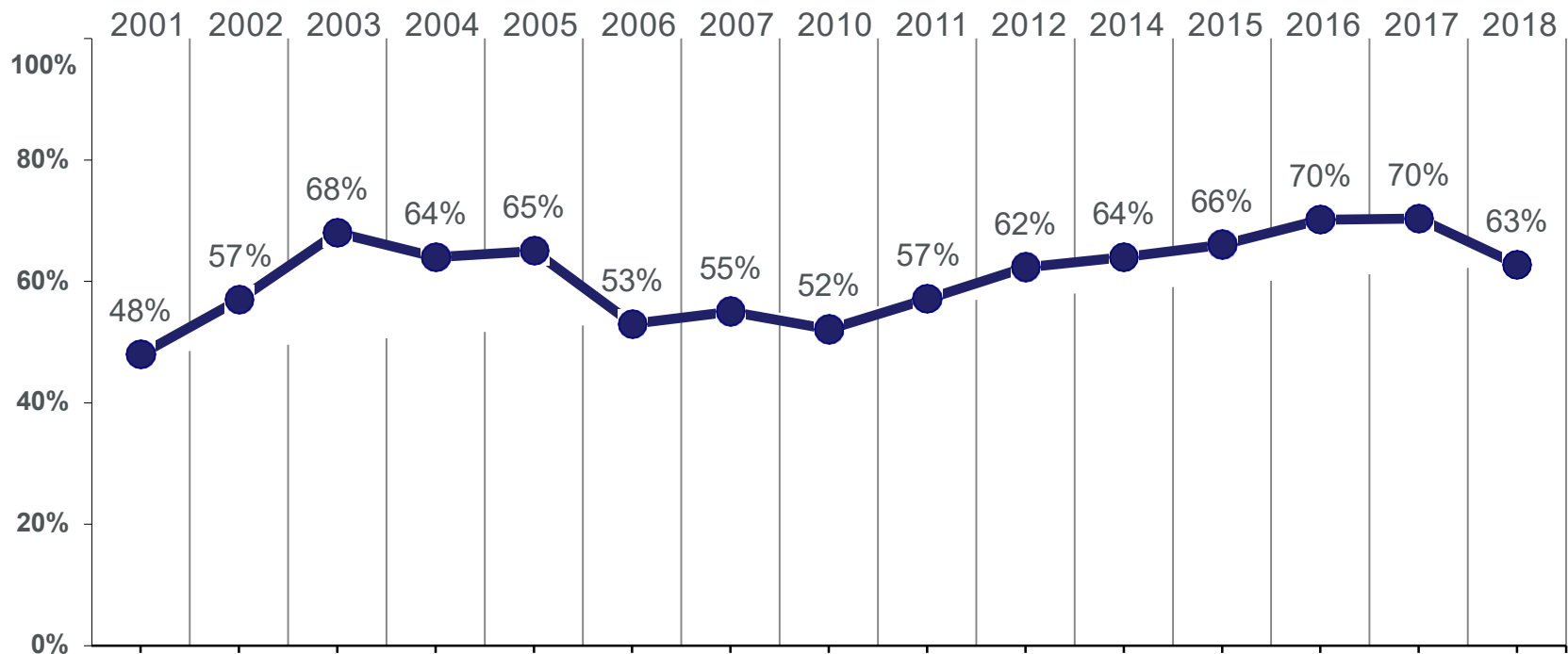
Source: 2018 Muni Rider Survey, prepared by COREY, CANAPARY & GALANIS RESEARCH

[https://www.sfmta.com/sites/default/files/reports-and-documents/2018/12/12-18-18\\_item\\_11\\_muni\\_rider\\_survey\\_2018.pdf](https://www.sfmta.com/sites/default/files/reports-and-documents/2018/12/12-18-18_item_11_muni_rider_survey_2018.pdf)

# Baseline - 2018 Muni Rider Survey Data

This, however, was trending down from the high of 70%.

2018 Trending: Overall Rating of Muni Service  
Excellent and Good Ratings Combined



Important Note: Between 2001-2004, a 5 point scale was used: excellent, good, fair, poor and very poor. Since 2005, a four point scale has been used: excellent, good, fair, and poor.

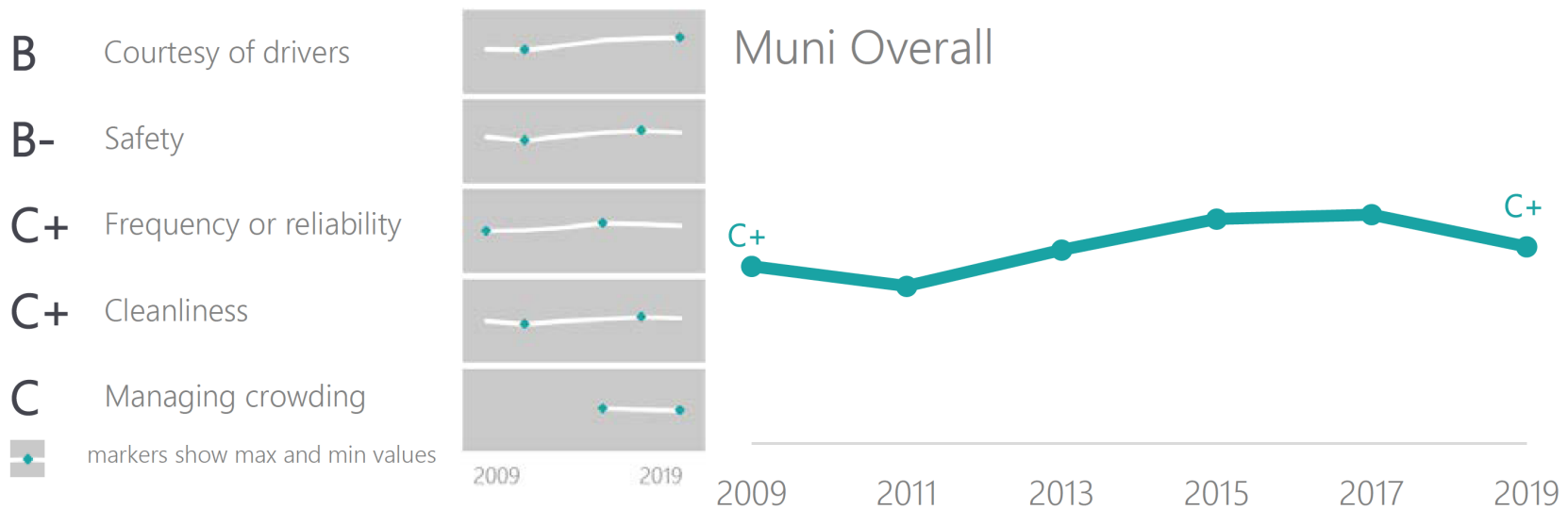
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[https://www.sfmta.com/sites/default/files/reports-and-documents/2018/12/12-18-18\\_item\\_11\\_muni\\_rider\\_survey\\_2018.pdf](https://www.sfmta.com/sites/default/files/reports-and-documents/2018/12/12-18-18_item_11_muni_rider_survey_2018.pdf)

## Baseline – 2019 Controller’s Office City Survey

The 2019 San Francisco City Survey confirms this trend.

### Muni ratings sink to 2013 levels from a B- to a C+



Forty-percent of respondents rate Muni an “A” or “B” in 2019, down from a high of 59% in 2017. Respondent ratings of the courtesy of drivers remains the highest rated of Muni attributes, and the only to increase from 2017. Of all ratings in the 2019 City Survey, Muni’s ability to manage crowding receives the lowest rating, a C average, with only 33% rating it an “A” or “B”.

Source: 2019 San Francisco City Survey

<https://sfcontroller.org/sites/default/files/Documents/Auditing/City%20Survey%202019%20-%20Report.pdf>







# San Franciscans' Attitudes Toward SFMTA and Transit Service

*Key Findings of a Citywide Survey Conducted April 19-28, 2021*



OPINION  
RESEARCH  
& STRATEGY

# Survey Methodology

<b>Dates</b>	April 19-28, 2021
<b>Survey Type</b>	Dual-mode Voter Survey
<b>Research Population</b>	Registered San Francisco Voters
<b>Total Interviews</b>	1,151 voters 100 Interviews conducted per Supervisorial District, weighted to represent true geographic distribution of voters
<b>Margin of Sampling Error</b>	(Full Sample) $\pm 3.0\%$ at the 95% Confidence Level (District Samples) $\pm 9.8\%$ at the 95% Confidence Level
<b>Data Collection Modes</b>	 Telephone Interviews  Online Interviews
<b>Languages</b>	English, Spanish and Chinese

*(Note: Not All Results Will Sum to 100% Due to Rounding)*



# Perceptions and Use of SFMTA

# A majority approves of SFMTA's performance, although only one in five "strongly" approve.

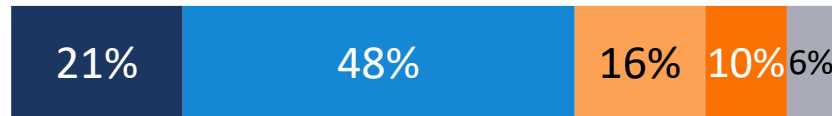
*I am going to mention a few organizations within City government. Please tell me whether you approve or disapprove of the job they are doing.*

■ Strng. Appr. ■ Smwt. Appr. ■ Smwt. Disappr. ■ Strng. Disappr. ■ Don't Know

**Total Appr.** **Total Disappr.**



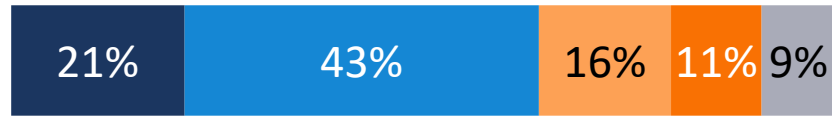
The San Francisco Municipal Transportation Agency, also known as Muni



**69%** **26%**



The San Francisco Municipal Transportation Agency, also known as SFMTA



**64%** **27%**



BART



**60%** **21%**



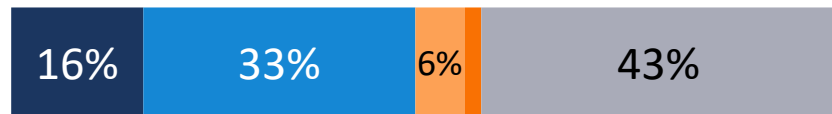
<sup>^</sup>San Francisco city government



**59%** **34%**



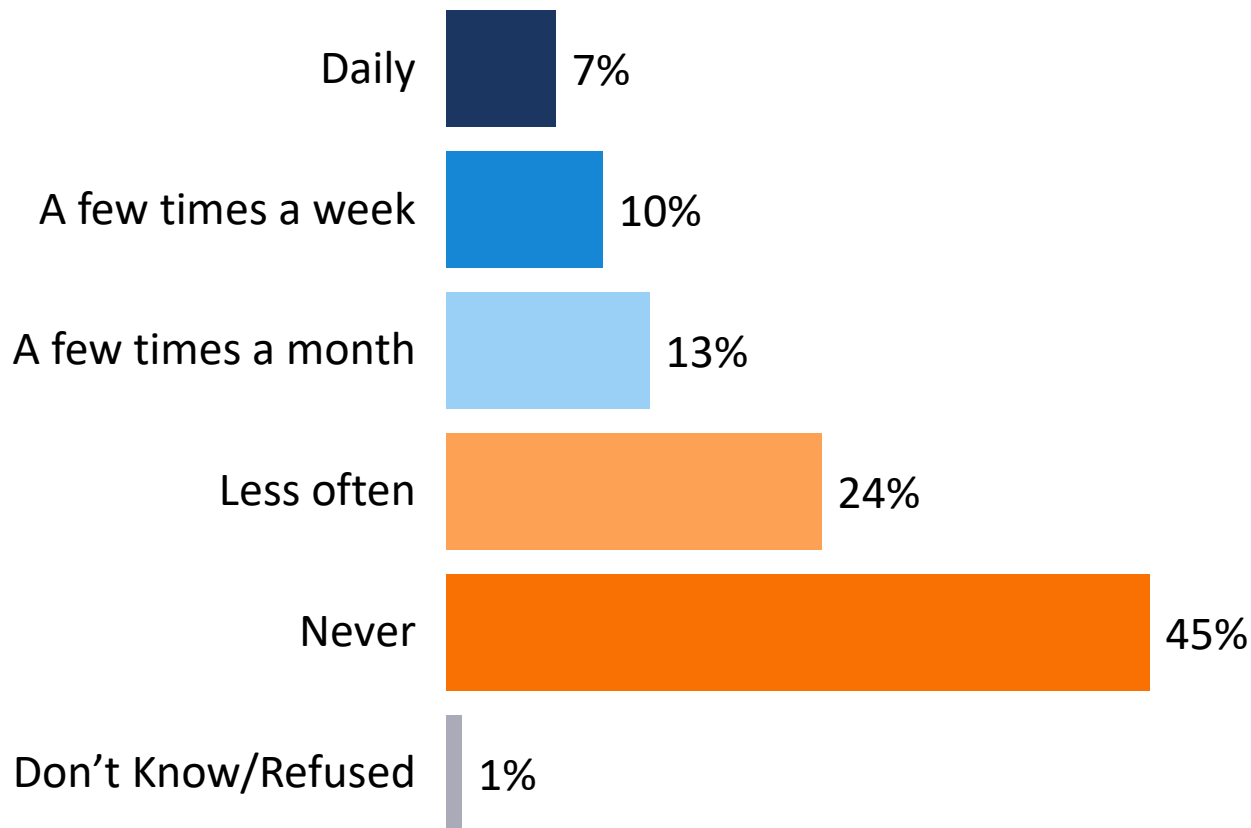
Caltrain



**49%** **8%**

# A majority has ridden Muni at least once since the start of the pandemic...

*Since the start of the pandemic, how often have you ridden Muni?*

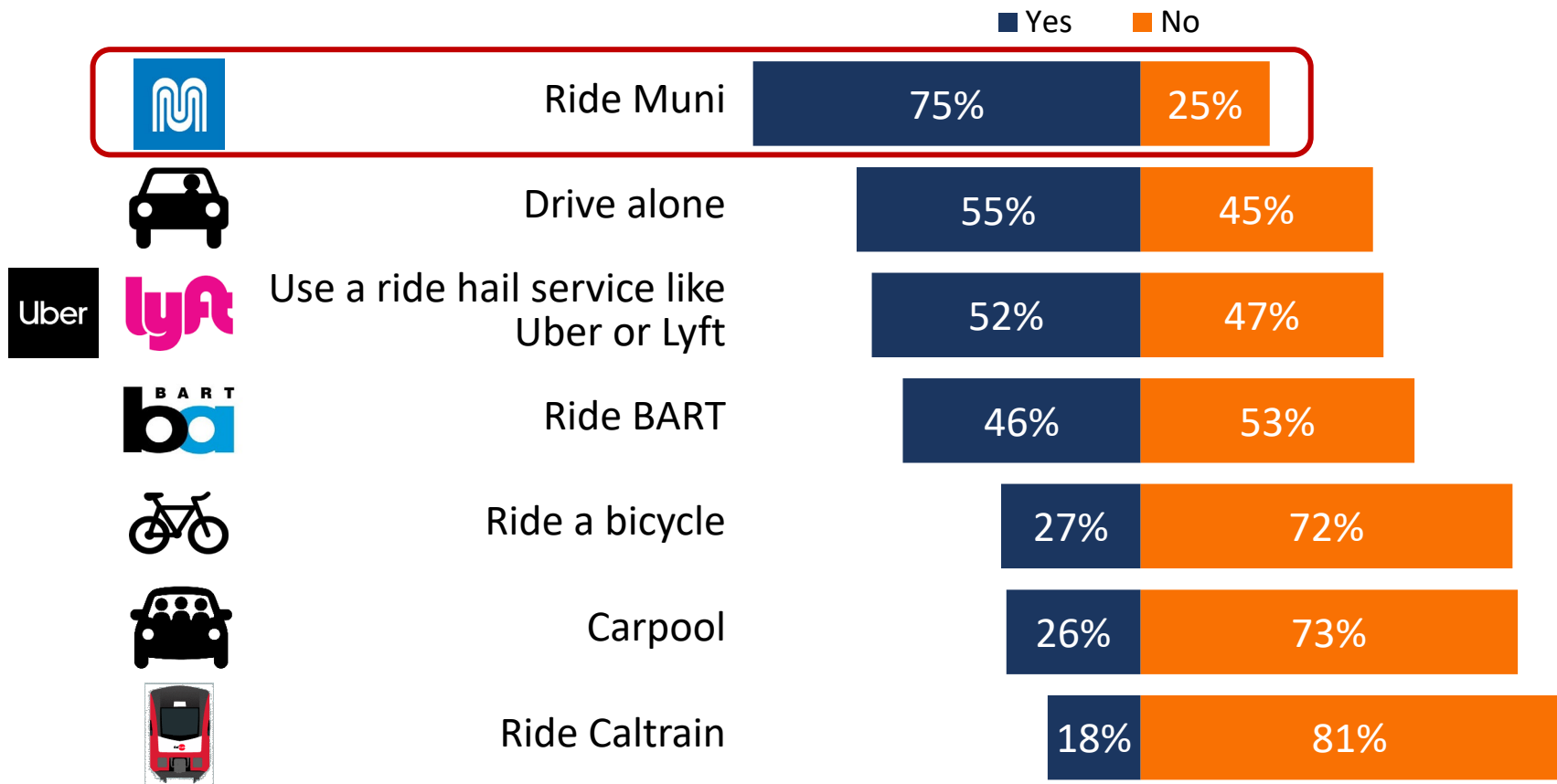


**Those most likely to have ridden at least a few times a month are:**

- Latinos
- Don't have access to a car
- Non-college educated men
- District 6 residents
- Chinese speakers
- Household incomes below \$74,500

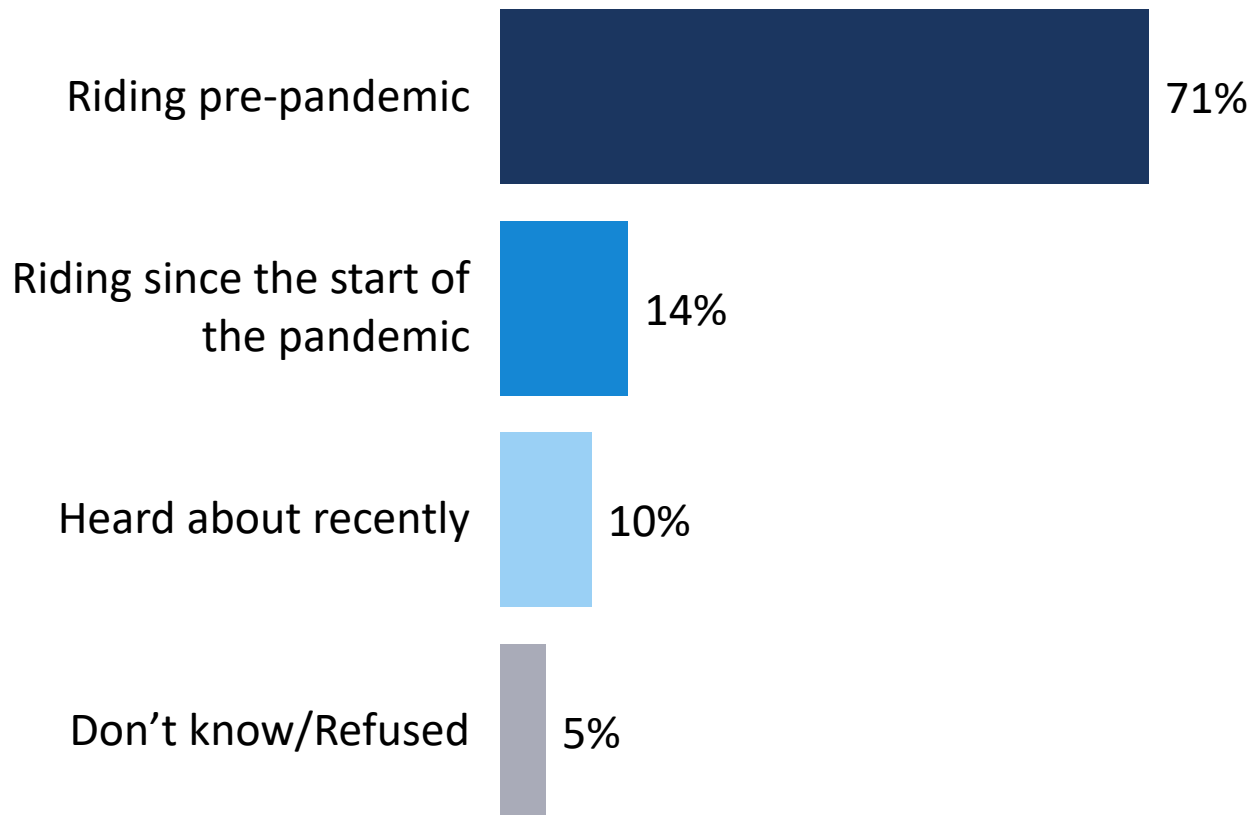
# ...but before the pandemic three-quarters said they rode 2-3 times per week.

*Before the pandemic, did you regularly, that is at least 2 or 3 times per week, use any of the following modes of transportation? By that I mean for any purpose, including commuting to school or work, running errands, or recreation.*



# Most respondents' impressions of Muni are based on their experiences riding *pre-pandemic*.

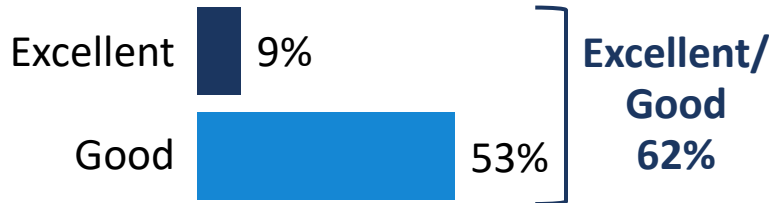
*Would you say your perceptions of Muni are mainly shaped by: your experience riding it pre-pandemic, your experience riding it since the start of the pandemic, or what you have heard, read, or seen about Muni over the last several months?*



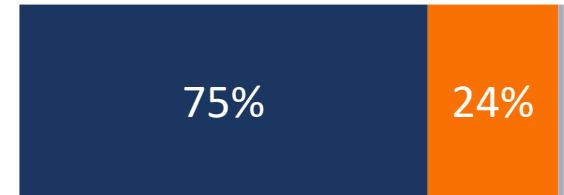
# A majority says Muni service is "good" but only one in ten say it is "excellent."

How would you rate the quality of Muni's service:  
is it excellent, good, not so good or poor?

■ Exc./Good ■ Not So Good/Poor ■ Don't Know



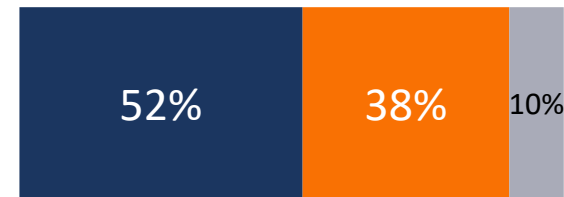
Ride Muni at Least  
a Few Times a  
Month



Ride Muni Less Often



Never Ride Muni

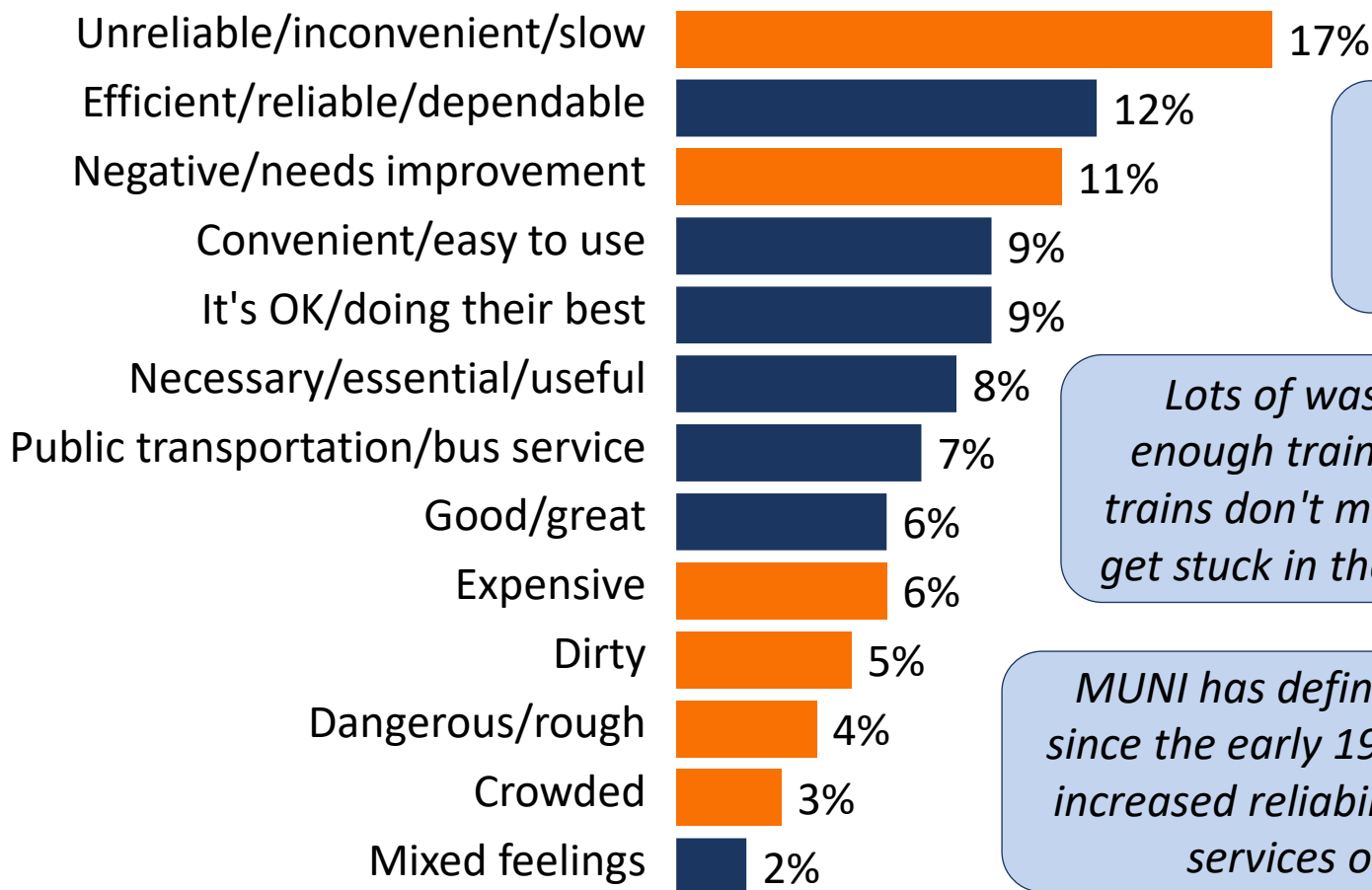




# Respondents' descriptions of Muni reflect contrasting impressions.

*If you had to describe Muni in one or two of your own words, how would you describe it?*

*(Open-ended; Asked of Half Sample; n=576)*



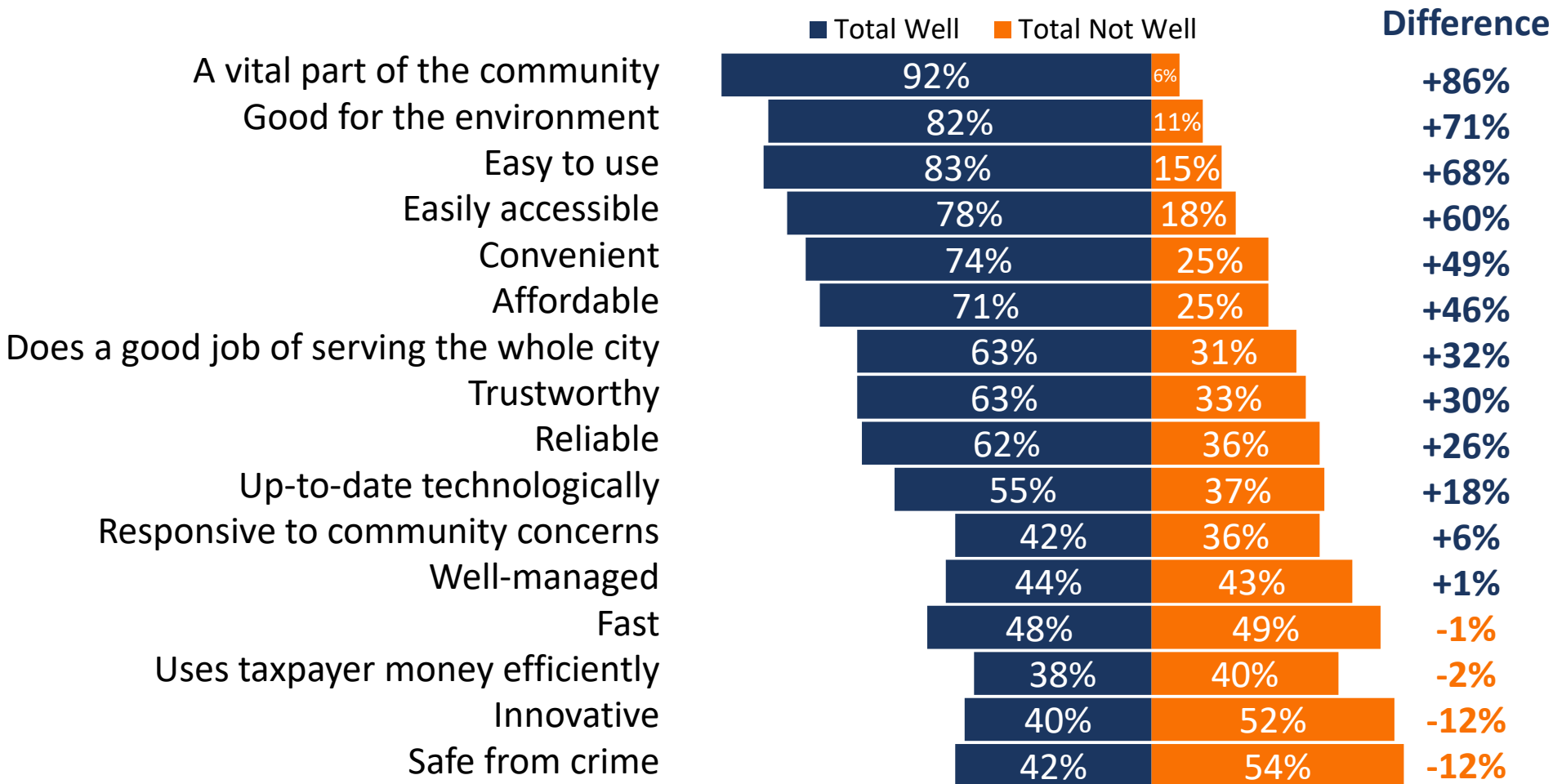
*Not run well, not enough trains, stations are a mess, security is sketchy.*

*Lots of wasted potential: not enough trains around rush hour, trains don't move fast enough, and get stuck in their own traffic jams...*

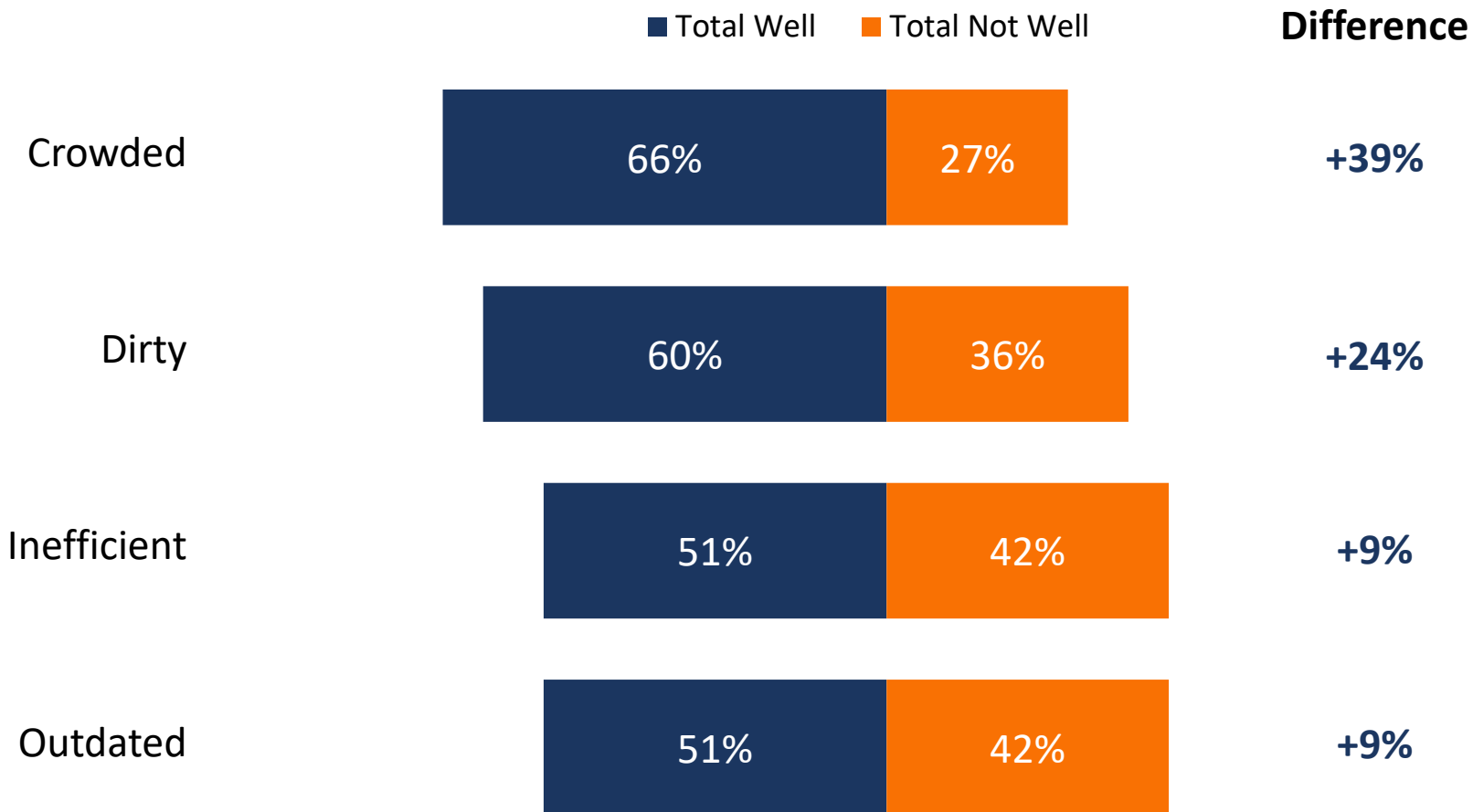
*MUNI has definitely improved a lot since the early 1990s. I appreciate the increased reliability and expansion of services over the years.*

# San Franciscans perceive a wide range of benefits to Muni.

Here is a series of words and phrases that someone might use to describe Muni. Please tell me if it describes Muni as an organization very well, somewhat well, not too well, or not at all well.



# At the same time, they have concerns about it being “crowded” and “dirty.”



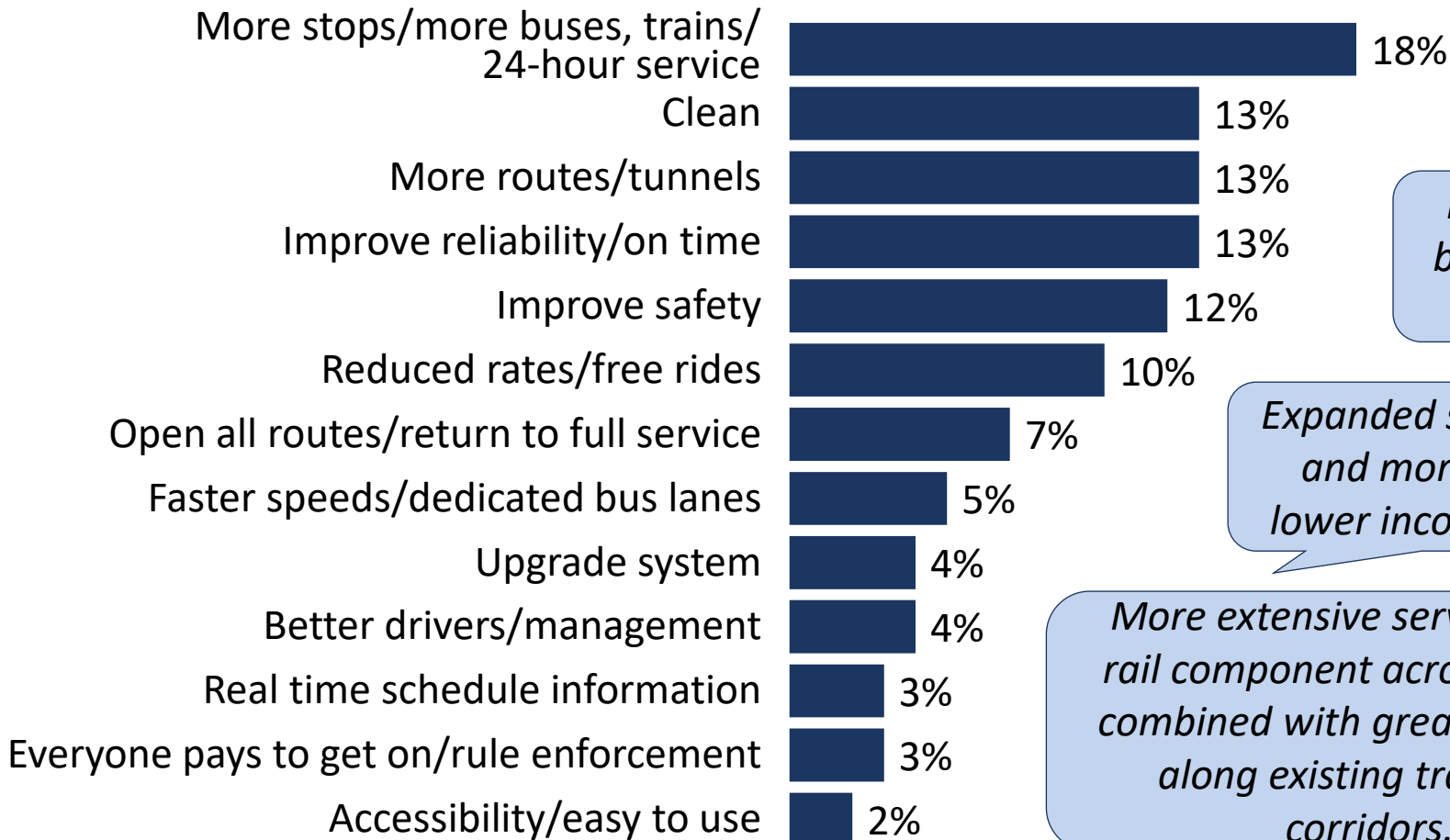
Q7. Here is a series of words and phrases that someone might use to describe Muni. Please tell me if it describes Muni as an organization very well, somewhat well, not too well, or not at all well. Split Sample



# Project Priorities

# The most important change respondents mention wanting to see is increased service.

*What's the most important change you would like to see made to Muni?  
(Open-ended; Asked of Hal Sample; n=575)*



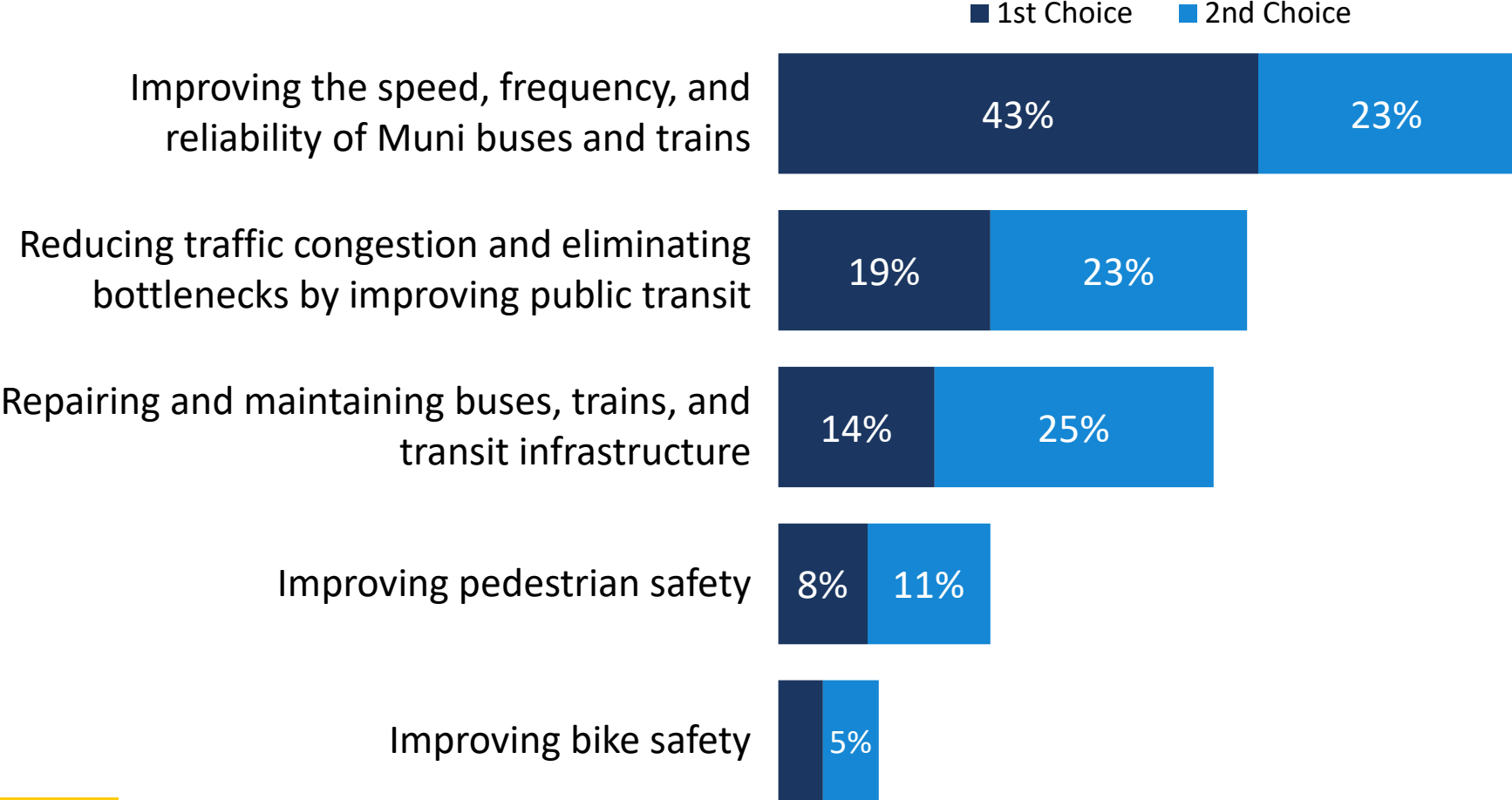
*I want it to be safer and cleaner.*

*Expanded service area and more help for lower income people.*

*More extensive service of the rail component across the city combined with greater density along existing transport corridors.*

# Improving the speed, frequency, and reliability of Muni buses and trains is the top priority.

*I'm going to read you some different goals Muni may have. Please tell me which one should be the highest priority.*



# Having frequent service is seen as a higher priority than having service very close to one's home.

*I am going to read you several pairs of statements about Muni.  
When thinking about improving Muni service, which is more important:*

Having the most frequent and reliable buses and trains, even if stops are slightly further from where I live



**OR**

Having a Muni stop very close to where I live, even if the buses or trains run less frequently

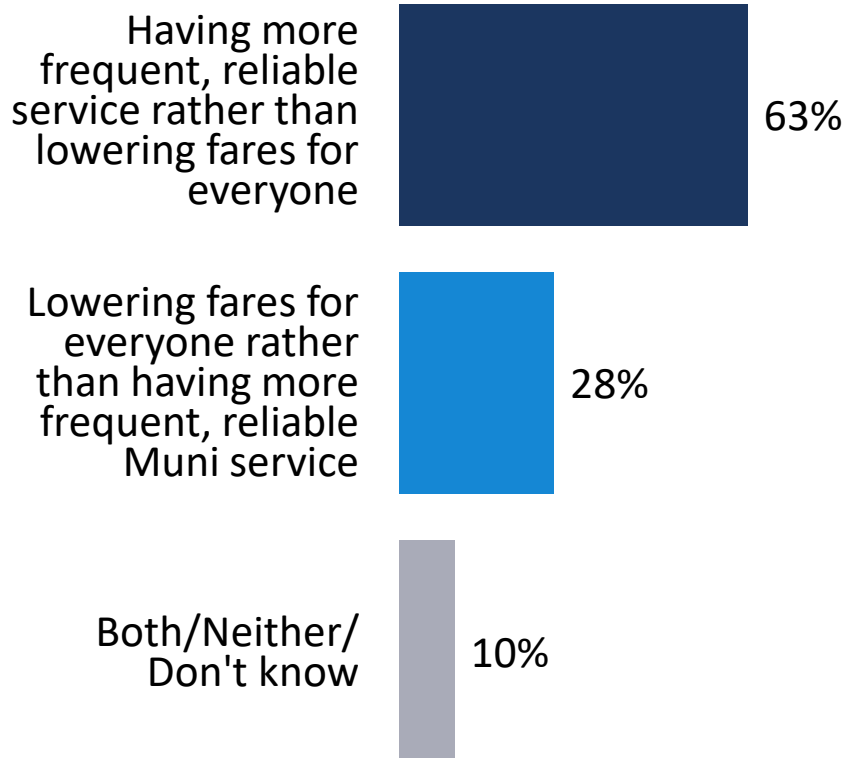


Both/Neither/Don't know 9%

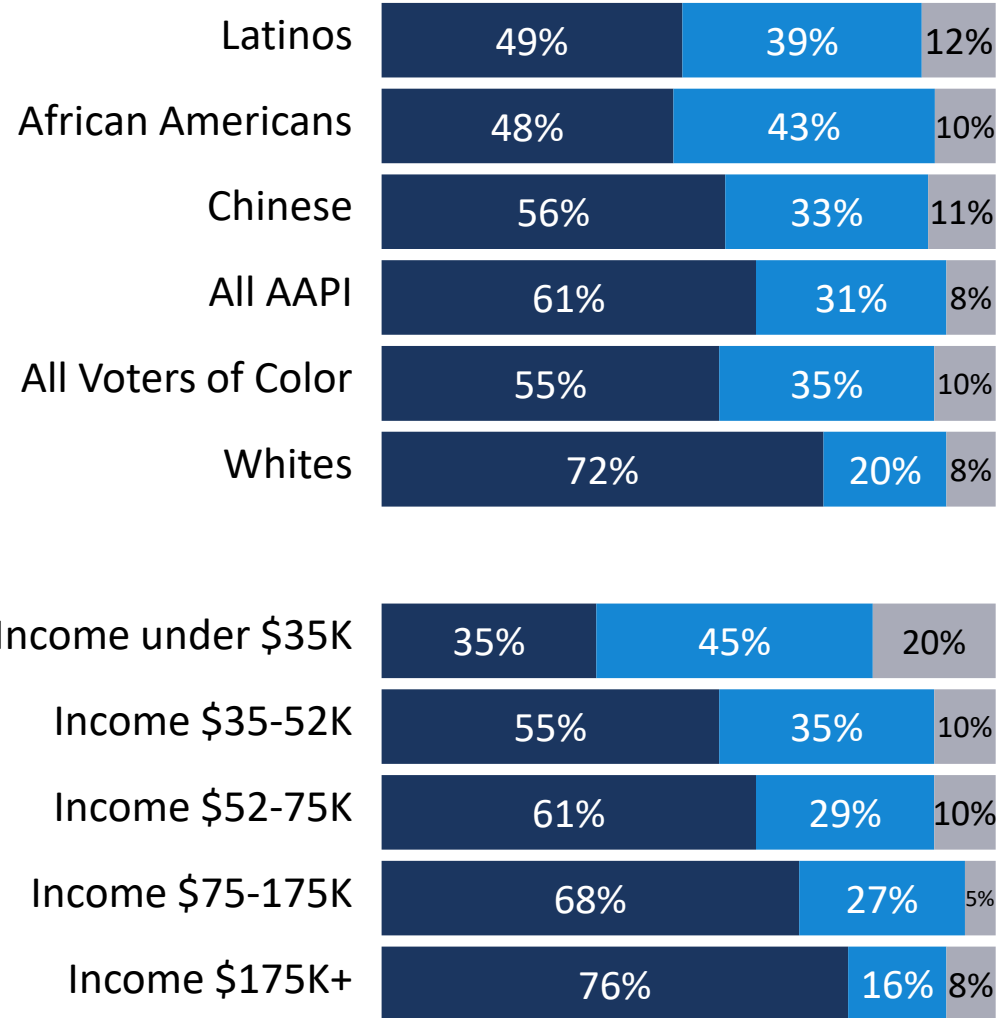


# Having more frequent, reliable service was seen as a higher priority than lowering fares for everyone.

*I am going to read you several pairs of statements about Muni. When thinking about improving Muni service, which is more important:*



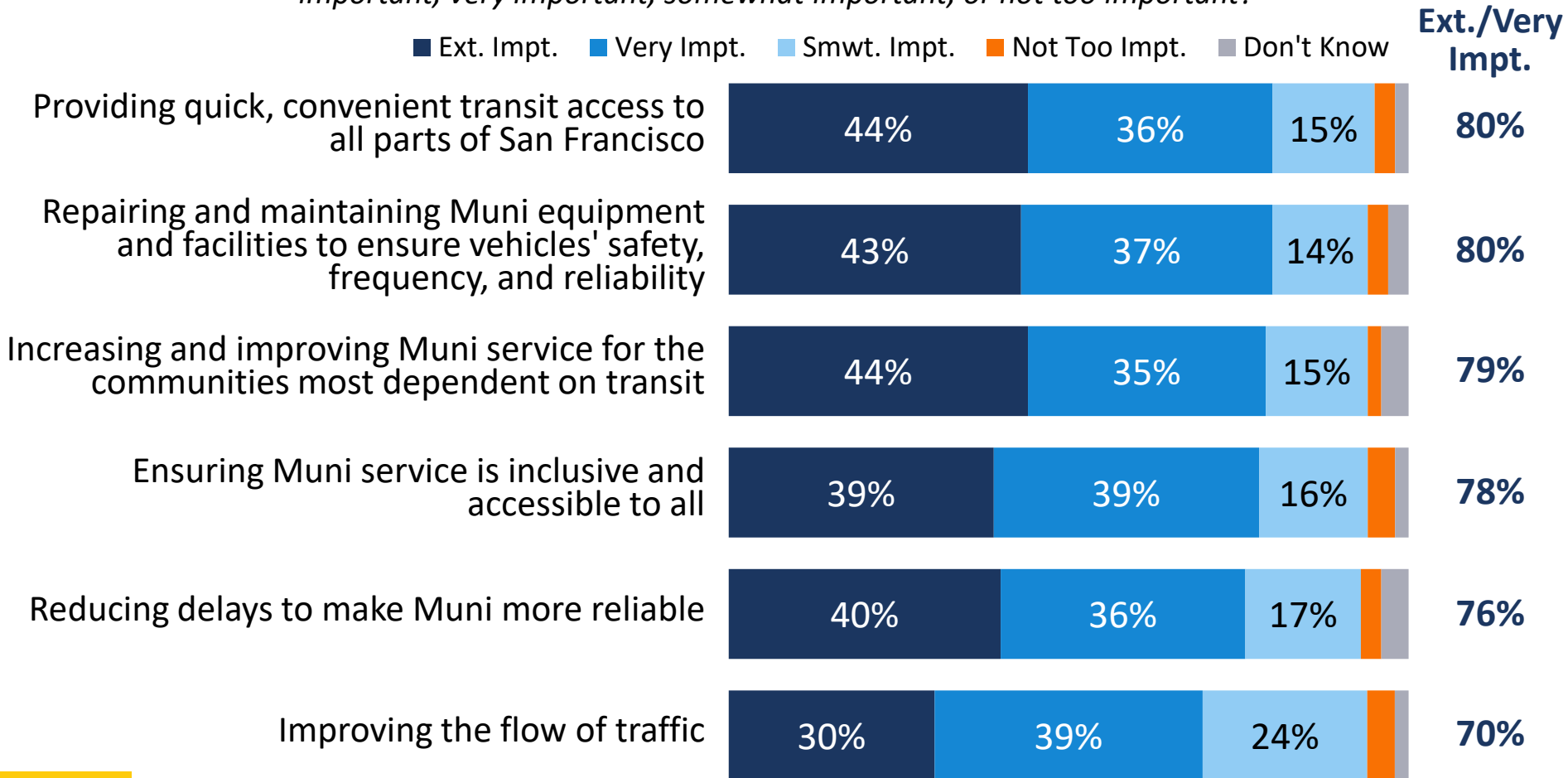
■ Frequent/Not Cheaper ■ Cheaper But Infrequent ■ Both/Neither/Don't Know





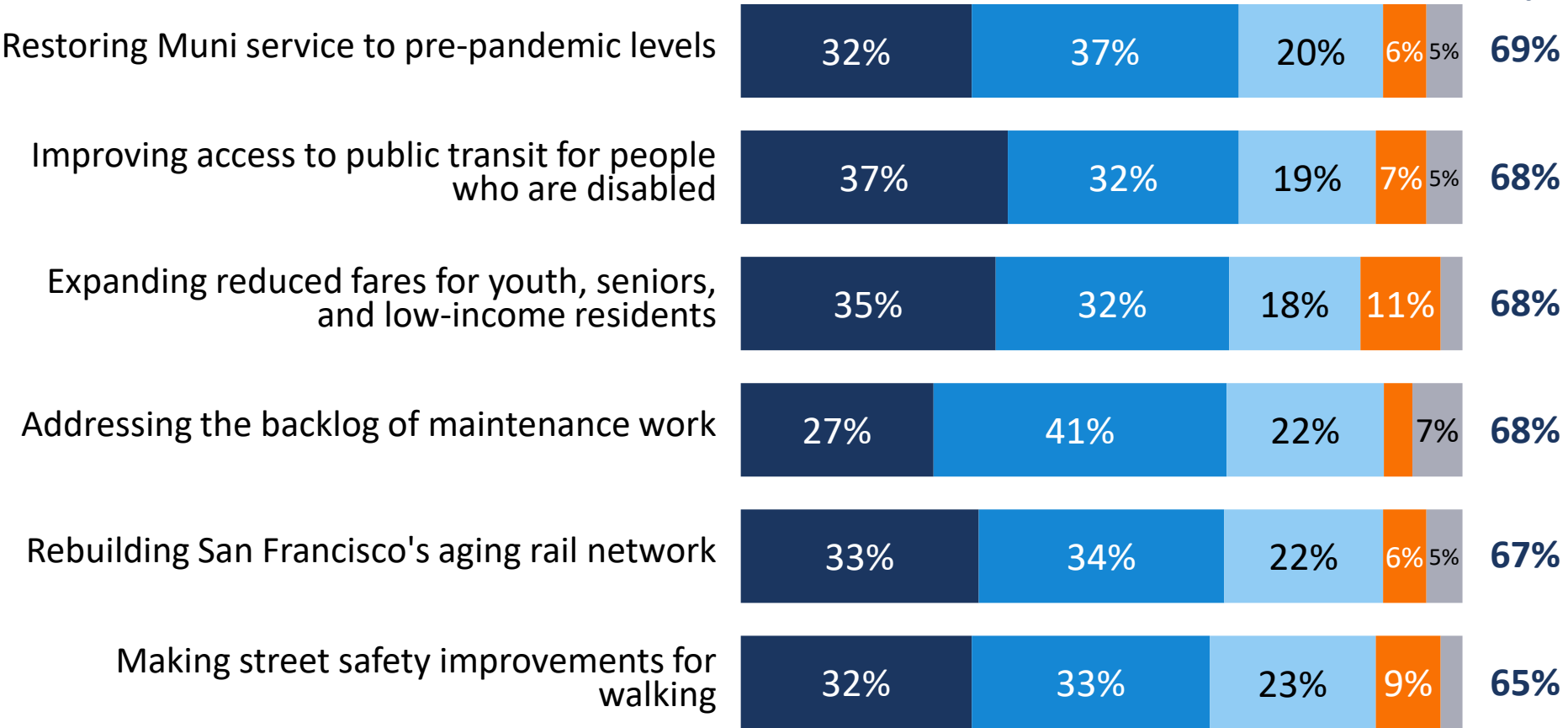
# Providing quick, convenient transit, repairing and maintaining Muni equipment and improving service for communities dependent on transit are the highest-priority improvements.

*I am going to read you a list of projects SFMTA might prioritize in the future to improve service to San Franciscans. Please tell me how important of a priority each project should be for Muni: extremely important, very important, somewhat important, or not too important?*



# Restoring Muni service, improving access for people who are disabled and expanding reduced fares were also perceived as important priorities, although with less urgency.

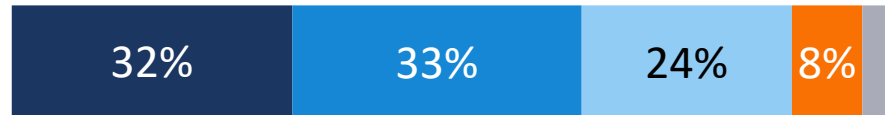
■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know **Ext./Very Impt.**



# Reducing crowding and delays and getting Muni on firmer financial footing were middle-tier priorities.

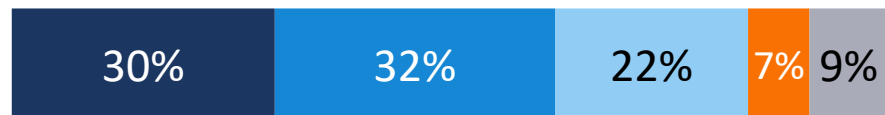
■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know **Ext./Very Impt.**

Reducing crowding on Muni



**65%**

Reducing delays and train congestion in the Muni Metro subway from Embarcadero to Castro Street



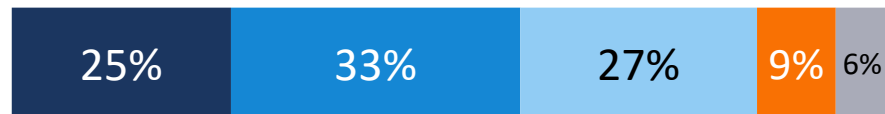
**62%**

Getting Muni on firmer financial footing



**60%**

Increasing Muni service above pre-pandemic levels



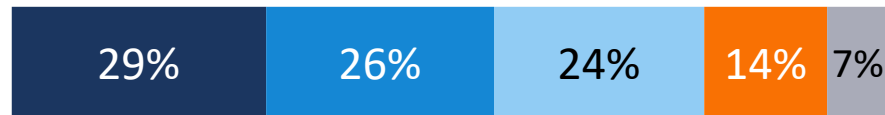
**58%**

Improving Muni's real-time update digital signs



**57%**

Building a modern light rail system

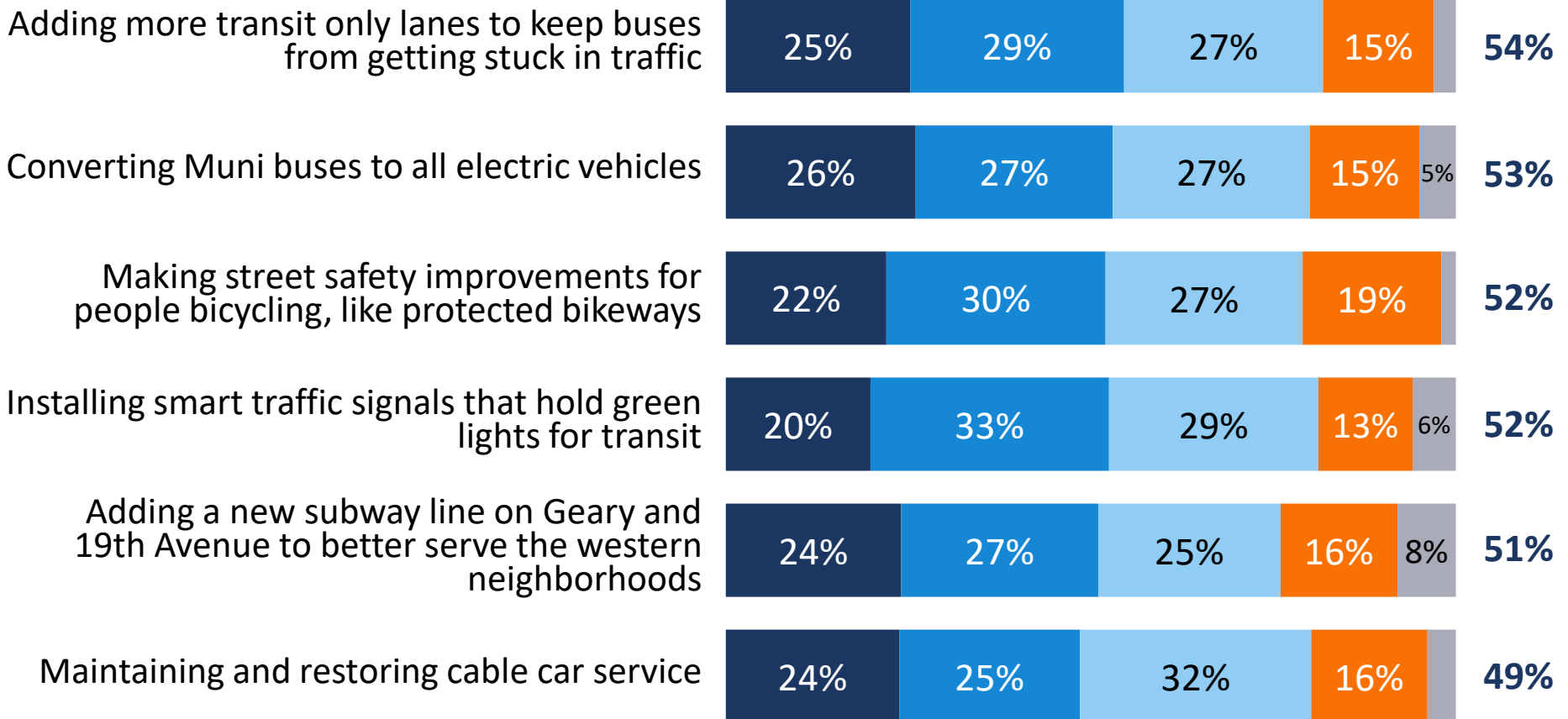


**55%**

Q13. I am going to read you a list of projects SFMTA might prioritize in the future to improve service to San Franciscans. Please tell me how important of a priority each project should be for Muni: extremely important, very important, somewhat important, or not too important? Split Sample

# A majority say it is important to add more transit lanes and convert Muni busses to EV.

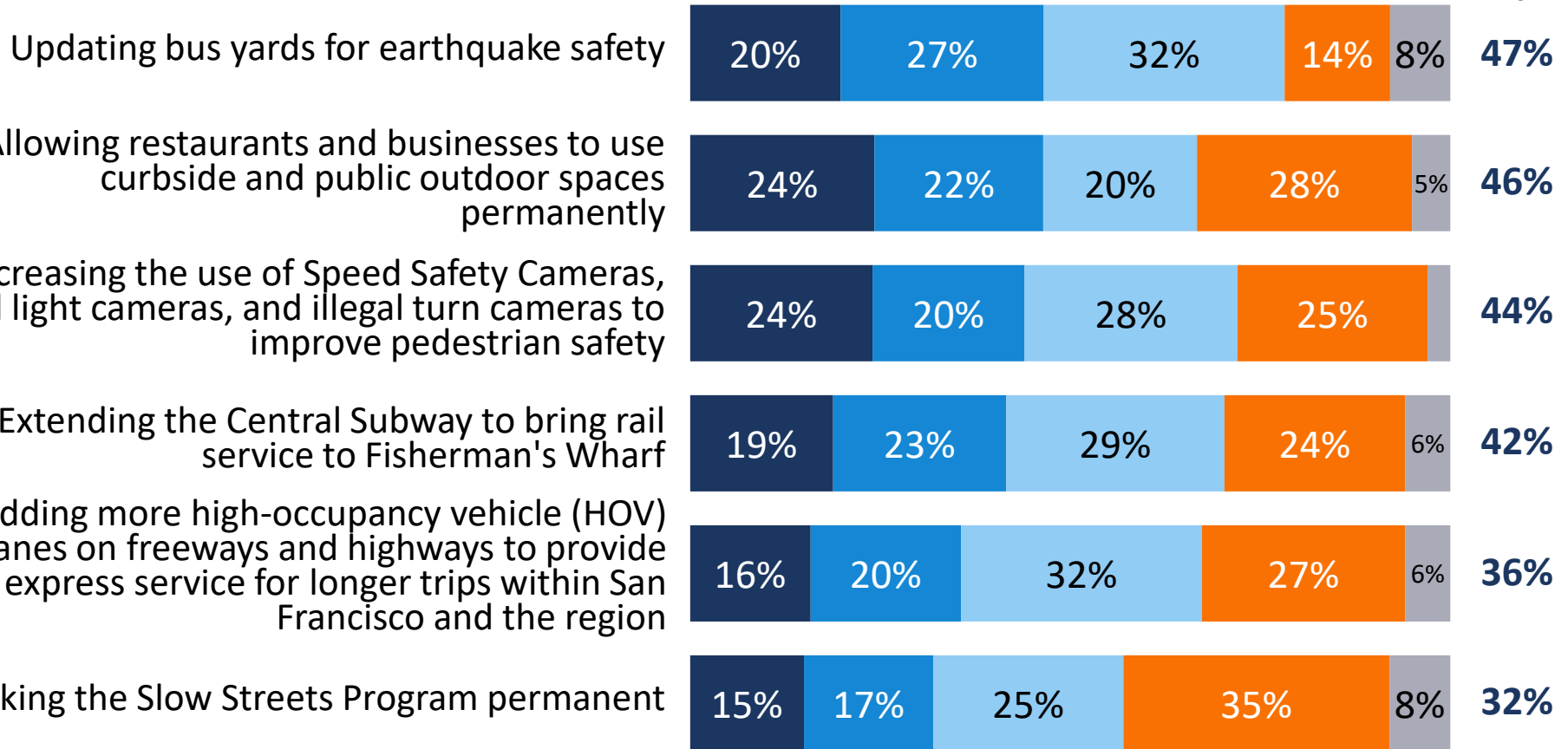
■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know **Ext./Very Impt.**



Q13. I am going to read you a list of projects SFMTA might prioritize in the future to improve service to San Franciscans. Please tell me how important of a priority each project should be for Muni: extremely important, very important, somewhat important, or not too important? Split Sample

# Adding more HOV lanes and making Slow Streets permanent were the lowest priorities relative to other items tested.

■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know **Ext./Very Impt.**

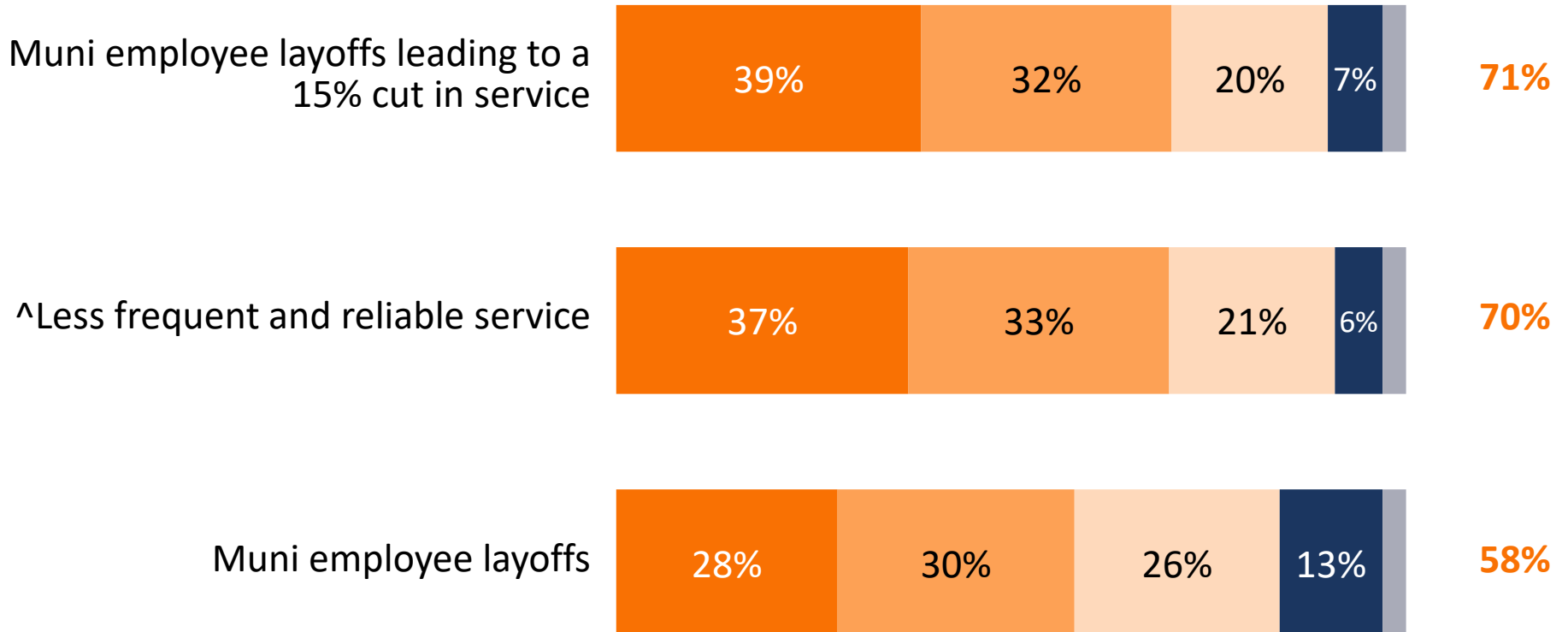


Q13. I am going to read you a list of projects SFMTA might prioritize in the future to improve service to San Franciscans. Please tell me how important of a priority each project should be for Muni: extremely important, very important, somewhat important, or not too important? Split Sample

# When asked about a series of potential cuts to Muni, those directly highlighting a reduction in service were most concerning.

*I am going to read you a list of potential outcomes if Muni does not receive additional funding. Tell me if it is extremely concerning, very concerning, somewhat concerning, or not too concerning.*

■ Ext. Conc. 
 ■ Very Conc. 
 ■ Smwt. Conc. 
 ■ Not Too Conc. 
 ■ Don't Know 
 **Ext./Very Conc.**

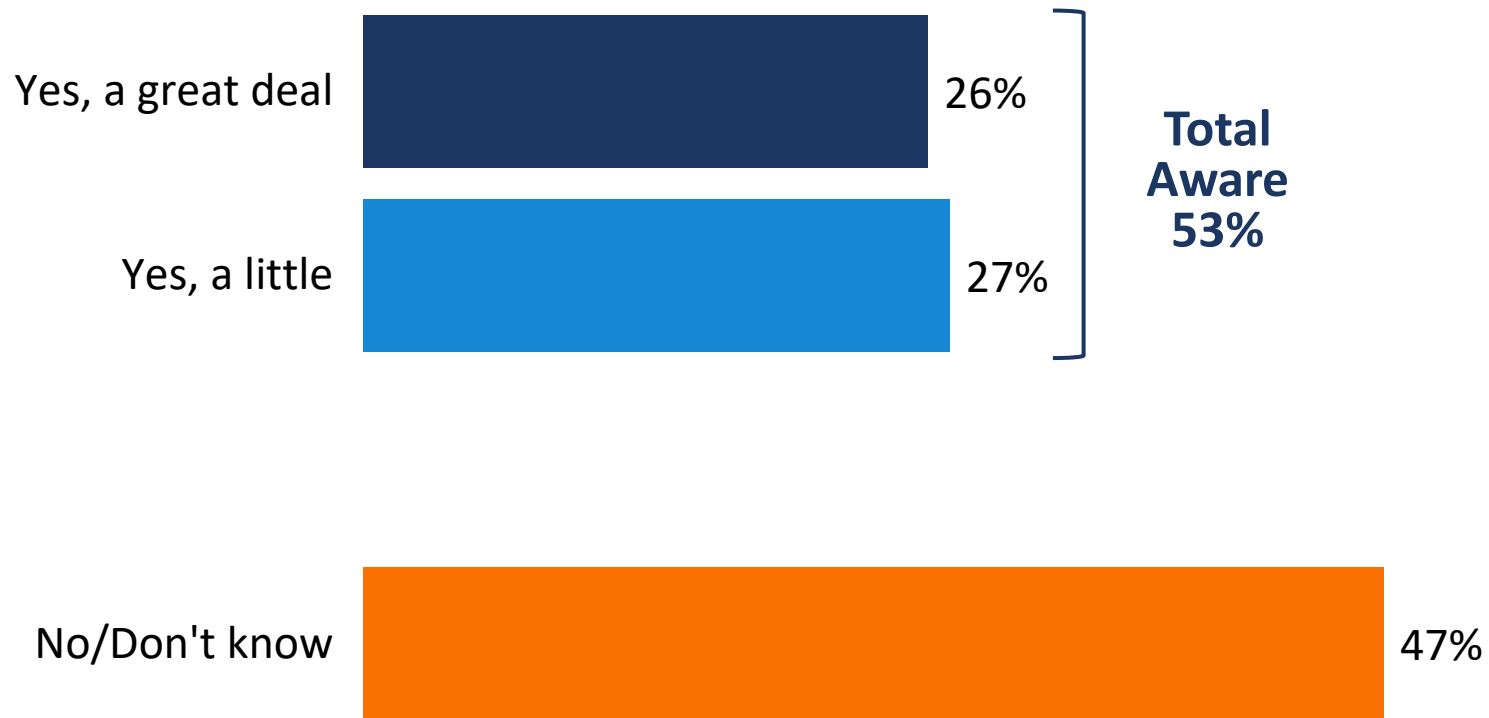




# Slow Streets

# A majority has heard at least a little about the Slow Streets Program recently.

*Have you heard, seen, or read anything recently about the Slow Streets Program?*





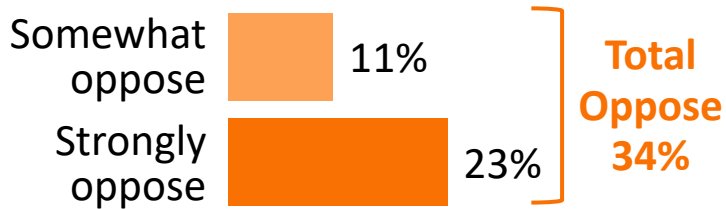
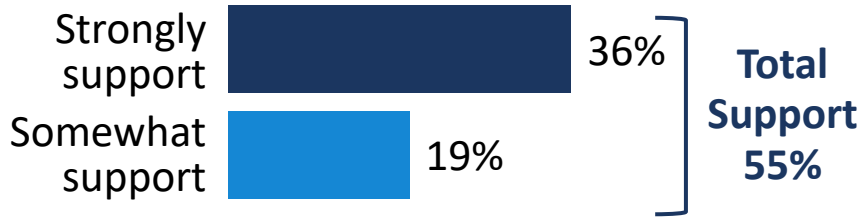
# Slow Streets Program Description Provided

During the pandemic, SFMTA implemented the “Slow Streets” program that limits through-traffic on certain residential streets to be used as a public space for people traveling by foot and by bicycle. Nearly 30 corridors have become slow streets throughout the city. On these Slow Streets, signage and barricades have been placed to minimize vehicle traffic and prioritize walking and biking.

# A majority supports making Slow Streets permanent and expanding it.

*Some people have proposed making existing Slow Streets permanent and expanding the program to include more streets in San Francisco. Do you support or oppose that proposal?*

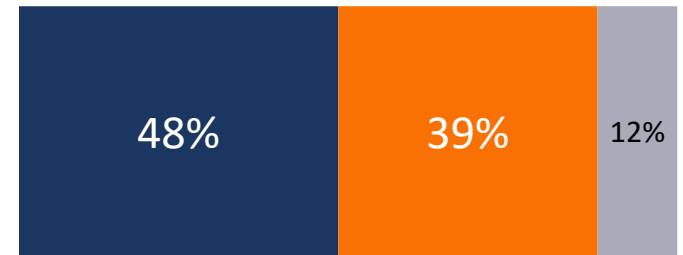
■ Total Supp. ■ Total Opp. ■ Don't Know



Aware of Slow Streets



Unaware of Slow Streets

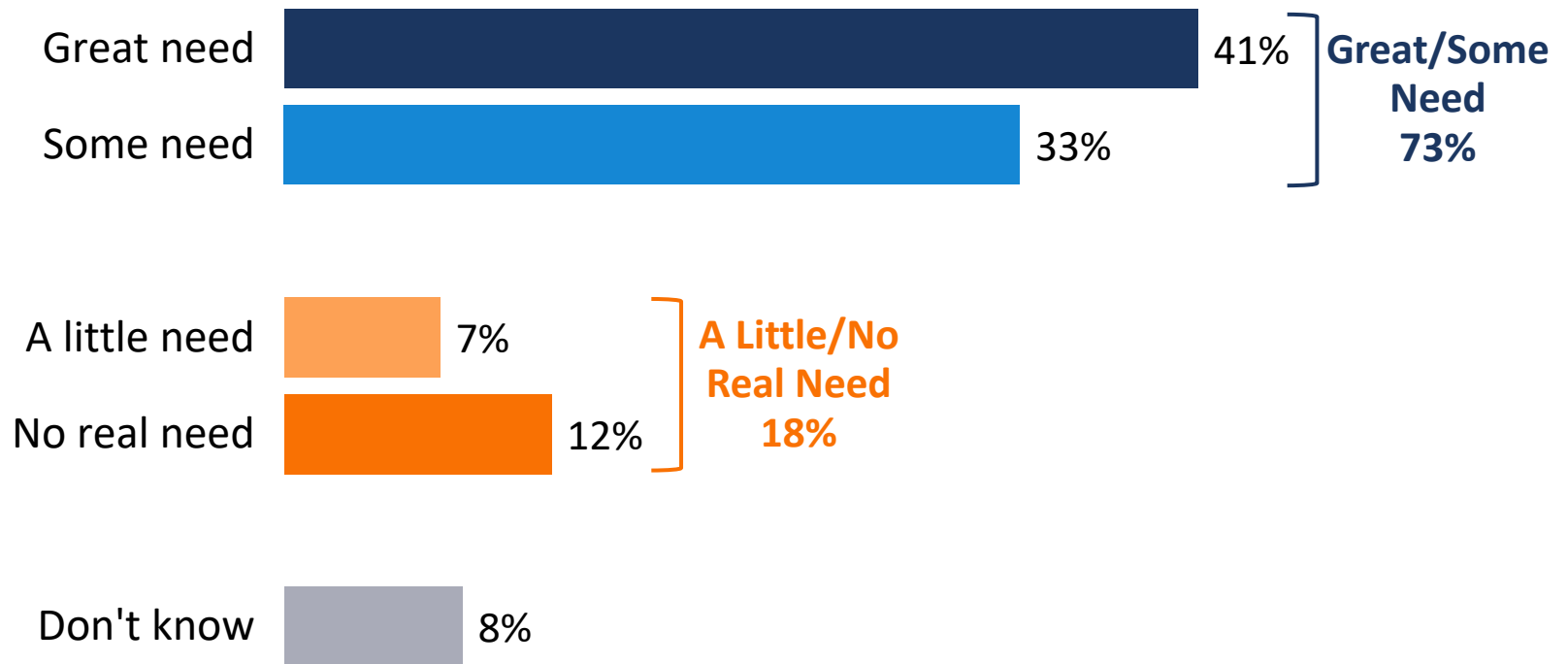




# Support for Funding Muni

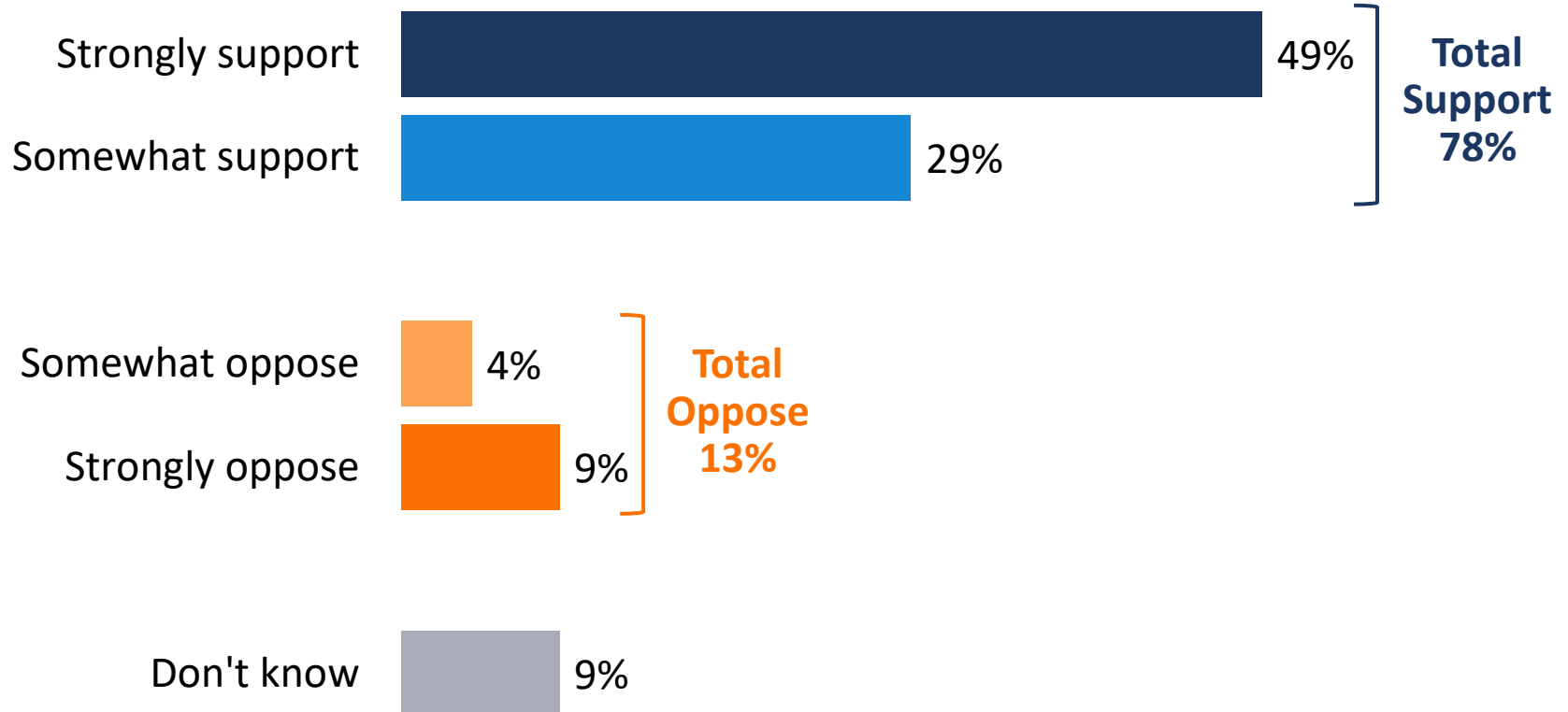
# Nearly three-quarters agree there is a need for more Muni funding.

*Do you think there is a great need, some need, a little need, or no real need for additional funds to improve Muni in San Francisco?*



# Nearly four in five conceptually support funding proposals on a future ballot.

*Some funding proposals may appear on a future ballot to finance the Muni services, equipment, and infrastructure that we have been discussing, including bringing service to pre-pandemic levels, improving reliability and frequency, improving pedestrian and bike safety, supporting the transition to electric vehicles and repairing and maintaining aging Muni infrastructure. In general, do you support or oppose this funding proposal?*





# Conclusions

# Conclusions

- Overall, most approve of the job being done by SFMTA and think the quality of service is good, but few say it is “excellent” or have *strongly* positive opinions about Muni.
- The most commonly-chosen adjectives to describe Muni are favorable ones; respondents indicate that it is a vital part of the community, easy to use, and good for the environment.
- Respondents prioritize using funds to repair and maintain Muni equipment and facilities, provide quick convenient access to all parts of San Francisco, increase and improve Muni service for the communities most dependent on transit, and ensure Muni service is inclusive and accessible to all.
- Additionally, a majority favors having frequent and reliable service over service very close to where they live; a similar number prefers to have more frequent and reliable service over having lower fares.
- Approximately three-quarters see a need for additional funding and a large majority conceptually backs potential funding proposals to provide it.

**For more information,  
contact:**



**OPINION  
RESEARCH  
& STRATEGY**

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Thank you.