



San Francisco
TRANSPORTATION 2050



SFMTA

T2050 Program Update

Transit Fare Compliance

Joint Development

SFMTA Board of Directors
October 15, 2024

Transportation 2050 (T2050)

presents possible futures and actions to address transportation needs and priorities in San Francisco.

Years of community planning, visioning and technical analysis

Transportation Task Force 2013 (T2030)

Transportation Task Force 2018 (T2045)

Muni Reliability Working Group 2020

Muni Funding Working Group 2024

ConnectSF

Vision Zero Action Plan

SFMTA 20-Year Capital Plan

Muni Equity Strategy

SFMTA State of Good Repair Report

2024 Muni Ridership Survey

2024 Focus Group Research

SFMTA 5-Year CIP

SFMTA 2-Year Budget

SF Transportation Plan

May 2023

2023 SFMTA Community & Rider Survey presented to the Board detailed information on San Franciscan's priorities and thoughts on the SFMTA.

December 2023

Capital Data & Programmatic Update – State of Good Report data + capital needs reflected in the updated SFMTA 20-Year Capital Plan; overall programmatic update closing out 2023.

2024 MTA Board Workshop and Budget Process

Today

T2050 Program - Update
2024 Community Focus Groups - Insights
Transit Fare Compliance Program - Update
Joint-Development Program - Policy

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Programmatic Update




Transportation 2050 includes a series of actions and initiatives that will allow the SFMTA to be adaptive, build resiliency and move toward financial sustainability

POLICY







OPERATIONS

CAPITAL

The goal is high quality service that builds trust. Invest in our workforce, in hiring and efficiency. Focused and strategic capital improvements.

-  Increases revenue
-  Sustains revenue
-  Reduces costs

POLICY

-  **Policy: Extended Meter Hours**
Consider expansion of meter hours into the evenings.
-  **Policy: Expand Paid Parking Zones**
To better manage parking expand meters and residential parking permit zones.
-  **Policy: Transit Fares – Continue Automatic Indexing Policy**
Deviation from the policy starting in FY 25 results in a revenue loss.
-  **Policy: Transit Fares – Remove the Clipper Discount**
Deviation from the policy starting in FY 25 results in a revenue loss.
-  **Policy: Advocate with the region for State Transit Relief**
Continue to advocate with the State for bridge funding to buy time for other recovery options.
-  **Policy: Advocate for new local Transportation GO Bond**
25% of assets beyond useful life, capital expenditures now, reduce operating costs later.

Updates:

- **Advocated for \$564 million in Transportation GO Bonds** (Prop B, \$64M in Nov. 2024; \$300M in Nov. 2026; \$200M in Nov. 2032) for capital improvements in adopted City 10-Year Capital Plan.
- **Advocated for a secured State relief funds for transit via SB 125**, expect a total of \$308 million. This is a one-time source.
- **SFMTA Board approved a reduction to the Clipper Discount and continuing the current Automatic Indexing Policy** as part of the FY 2025 & FY 2026 Budget.




Next Steps:

- Launched the **Muni Funding Working Group** in September, discussions are planned on Efficiencies, Revenue Options, Service.
- Continue advocacy and program development to address Transit Operating funding needs via **Regional Transportation Revenue Measure** in November 2026.
- **Community Survey** to go out in early 2025.
- Will **update policy initiatives** for next update with SFMTA Board.




The Metropolitan Transportation Commission (MTC) regional **Transportation Revenue Measure Select Committee** is working to create a regional consensus for a potential 2026 ballot measure to increase transportation funding in the Bay Area. This committee is composed of key stakeholders who are tasked with refining the details of the proposed measure and building support for it. Recent polls show that Bay Area residents are generally supportive of improved public transit.

Regional Measure Next Steps:

- SFMTA working with regional transit operators on a proposal for the October 21st Select Committee.
- Proposal focuses on compromise around areas of concern and disagreement to date.
- Recommend to the Select Committee a legislative framework that:
 - Builds **“Tools and Time”**
 - Could be **Parcel Tax OR Sales Tax – authorizes both**
 - **Short-Term** Measure
 - **Defined Regional Program** of Needs

-  Increases revenue
-  Sustains revenue
-  Reduces costs

OPERATIONS




-  **Ops: Grow Transit Demand**
Continue investments in safety, security, cleanliness, and reliability to grow transit ridership and fare revenues.
-  **Ops: Ops Investments that Reduce Costs**
Make one-time investments to reduce staff time and produce cost savings including attendance management, hiring processes, administrative processes, utility costs.
-  **Ops: Review City Department Workorder Costs**
Perform audit of current City Department workorders, verifying service for billings.
-  **Ops: Ensure Transit Fare Compliance**
Review fare per passenger costs regularly as recovery continues + continue to promote fare compliance across the transit system.

Updates:


- **Completed Muni Rider Survey** in April 2024.
- **Completed Focus Group** with Muni Riders in July 2024.
- **Average weekday Transit Ridership is up an estimated 14.8%** between July 2023 and July 2024 (*average weekday*).
- **Completed initial energy and utility use audit in April 2024;** implementing Phase I improvements and performance monitoring program.
- Developed Fare Recovery and Compliance Program; hired **9 new Transit Fare Inspectors**.

Next Steps:

- **Launch communications program on fare compliance and fare programs** in October 2024 – car cards across the Muni Fleet.
- Continue hiring **additional Transit Fare Inspectors through FY 2025**.

-  Increases revenue
-  Sustains revenue
-  Reduces costs

CAPITAL

 **Capital:** Train Control Upgrade Project

The Train Control System Upgrade (TCUP) project will support the efficient use of the Muni Metro Subway, creating efficiency and improved customer experience.

 **Capital:** Traffic Signal Replacement & Upgrades

Traffic Signals are one of the major infrastructure elements in the Agency's backlog; condition assessment shortly will be complete. Investment in signals reduces long-term maintenance costs, supports Muni Reliability, and improves street safety.

  **Capital:** Facility Replacement & Joint Development

Facilities are one of the major infrastructure elements in the Agency's backlog; condition assessment is complete with \$200 m in deferred maintenance. Investment in facilities allowed for modern maintenance bays and support equipment, better training facilities, more efficient utility use and provides the potential for joint-developments that will generate long term revenues – sites include Potrero Yard, Presidio Yard, 5th and Mission Parking Garage and Moscone Parking Garage.

Updates:

- **Potrero Yard Modernization Project entitlements approved + CEQA Certification;** received unanimous Board of Supervisors vote, legislation signed by the Mayor in March 2024.
- **The Train Control System Upgrade (TCUP)** consultant delivery support contract approved by the SFMTA Board in August 2024 approved by Board of Supervisors in September 2024.
- **Awarded \$1 million FY22-24 Federal Innovative Finance and Asset Concession Grant** for joint-development asset scan

Next Steps:

- Develop the **Joint-Development Program and associated policy** (MTAB update today).
- **The Train Control System Upgrade (TCUP) supplier contract** at MTA Board today.
- **Traffic Signal Condition Assessment** delayed October 2024; this will be used to identify and prioritize the use of GO Bonds, if Proposition B passes.
- Update **CCSF 10-Year Capital Plan and annual SFMTA State of Good Repair Report** in Fall 2024 and near-term capital forecasts.

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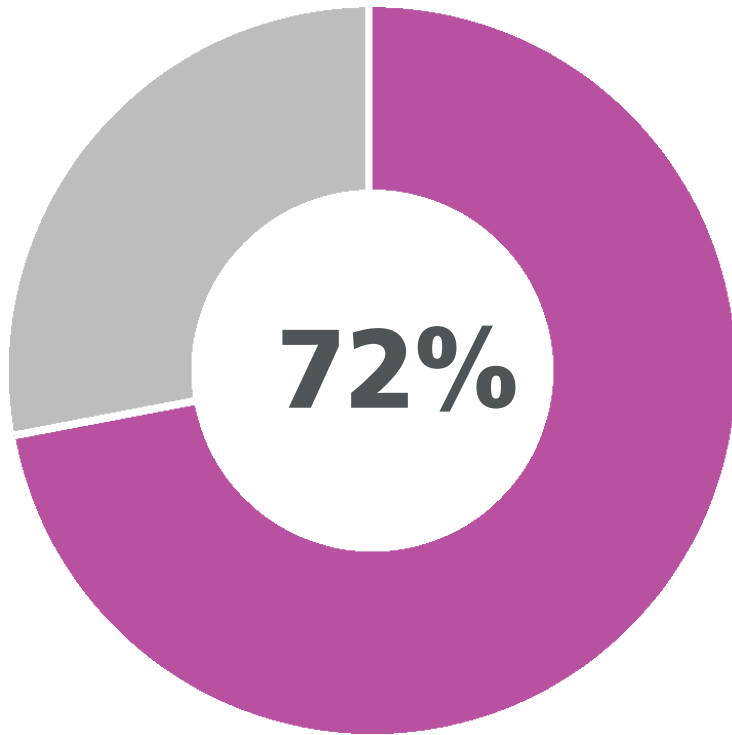


2024 SFMTA Ridership Survey and Focus Groups: Insights & Synthesis

Appendix: SFMTA 2024 Ridership Survey & SFMTA 2024 Focus Groups

Measuring and seeking public views allows us to create and build on the positive relationships we have. In this way we:

- *Seek opinions* of San Franciscans;
- *Stay in touch* with their issues, and
- *Balance the results* transparently.

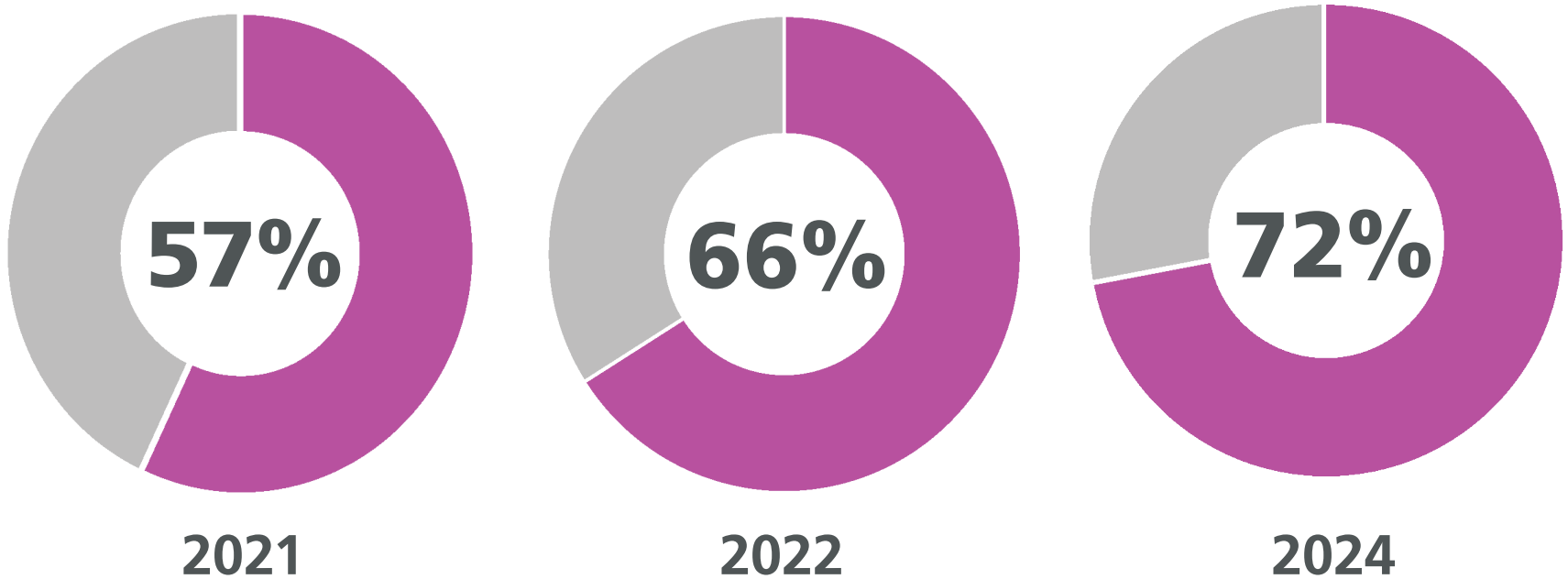


Source: SFMTA 2024 Ridership Survey

The 2024 Ridership Survey made clear that Muni is continuing to improve and is meeting rider expectations.

Seventy-two percent of respondents rated Muni service as Excellent/Good. This is the highest rating in two decades of polling.

The percentage of survey respondents rating Muni Service as “excellent” or “good” has **progressively increased** over recent years.



Source: SFMTA 2024 Ridership Survey

In July, we convened four focus groups to learn about views on SFMTA, our service, funding proposals and project priorities.

- The individual groups included: Westside voters; Eastside voters; Cantonese-speaking voters; Frequent Muni Riders.
- A total of 38 participants were recruited with a mix of age, gender, race/ethnicity, socioeconomic status, and political ideology to be generally representative.

People say Muni is convenient and affordable. But.....

- San Franciscans are worried about homelessness, safety and drug use.
- Concerns about reliability, safety and cleanliness color their perceptions of the transit system.
- Those concerns affect their willingness to support funding proposals.

Few know about the agency's funding challenges.

- General skepticism toward government leads people to assume that Muni is not well-managed.
- Tax fatigue, high cost of living, and a perceived lack of financial accountability drive opposition to new funding measures.
- Informing people about the loss of federal and state funding, proved compelling, i.e. local sources of revenues that could not be taken.

Fare evasion is a highly visible issue, and many focus group participants expressed frustration with it:

- The **lack of accountability is unfair**, participants were concerned by Muni's lack of action to address the problem.
- **Enforcing fares has other benefits.** Participants said safety and cleanliness would be improved as side effects.
- Fare evasion **colors views of Muni's fiscal situation**; willingness to support revenue proposals was also affected.
- It was clear participants wanted to see **progress on fare evasion before paying more** in fees, taxes or fares.

My feeling is that the fare enforcement needs to be increased because I think Muni is losing a lot of money from people not paying their fares and it's also making other problems. It makes it more crowded, makes it less safe. There's a lot of issues that come with not enforcing fare price and it used to be, years ago, where you didn't get on the bus without paying and I thought it was much better.

- Westside Participant

You have to fix the fare evasion first. People don't pay, they don't care.

- Muni Rider

Fare Evasion came up **organically and repeatedly** during the focus groups, especially when discussing Muni funding needs.

Participants were divided on whether greater Muni staff presence or increased police patrols would serve as a deterrent. They generally felt safety and cleanliness on transit would also improve as a co-benefit.

Source: SFMTA 2024 Focus Group

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Fare Compliance Update

The San Francisco Municipal Transportation Agency's Fare Compliance Educational and Marketing campaigns will seek to address the critical issue of riders not paying their fares. This issue has an out-sized effect (compared to the revenue it generates) on the public and their attitudes of trust toward the Agency and their personal feeling of safety while riding the system.

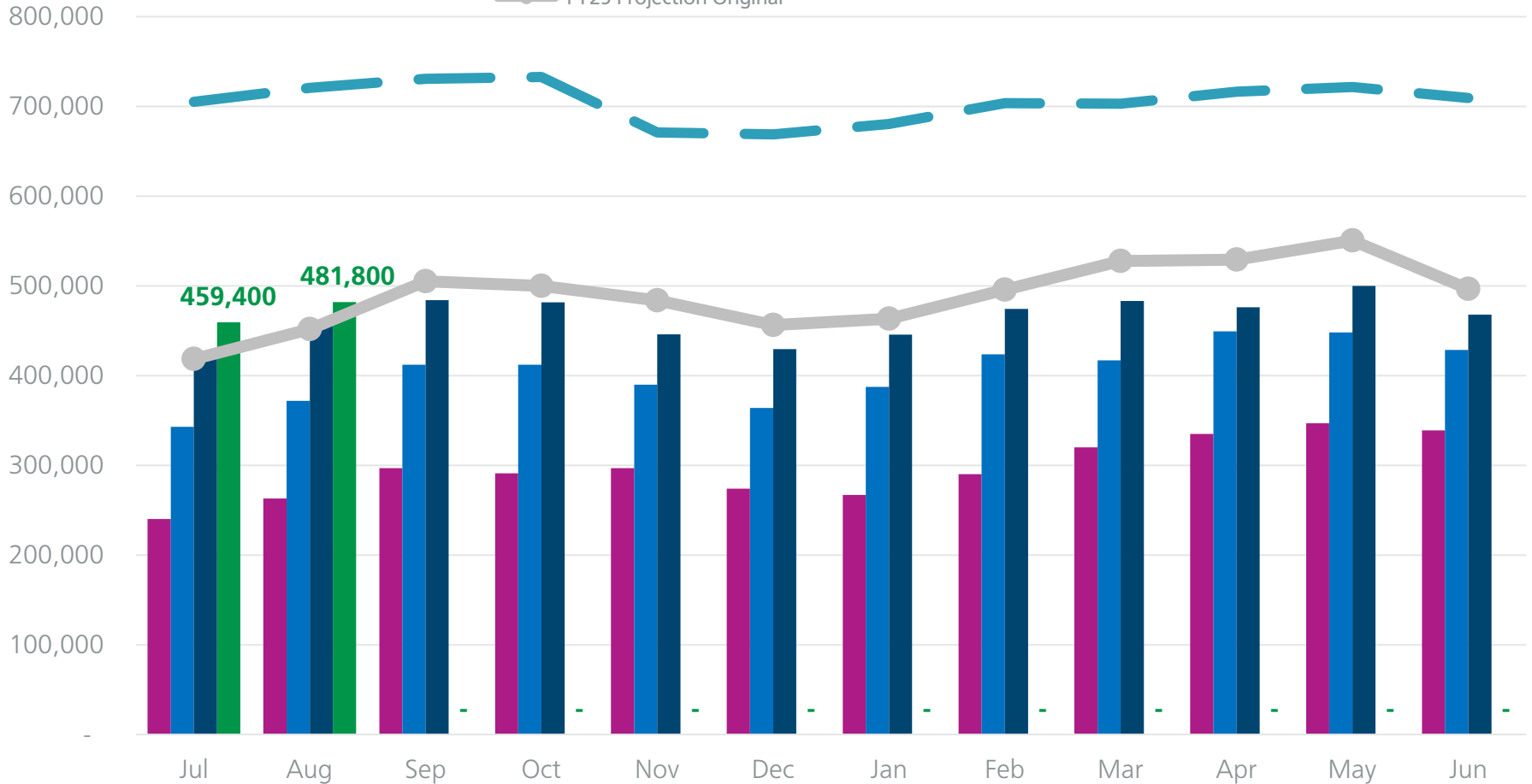
Average Weekday Ridership – FY 22, FY 23, FY 24, and FY 25 Actuals vs. FY 25 Projection



- FY 2022 Actual
- FY 2023 Actual
- FY 2024 Actual
- FY 2025 Actual
- Baseline (FY 2019)
- FY25 Projection Original

Muni Ridership Projection

Number of passengers boarded on an average weekday in each month



Note: FY 2025 Projection based on Unliked Trips Estimate provided to NTD, converted to Average Weekday Ridership.

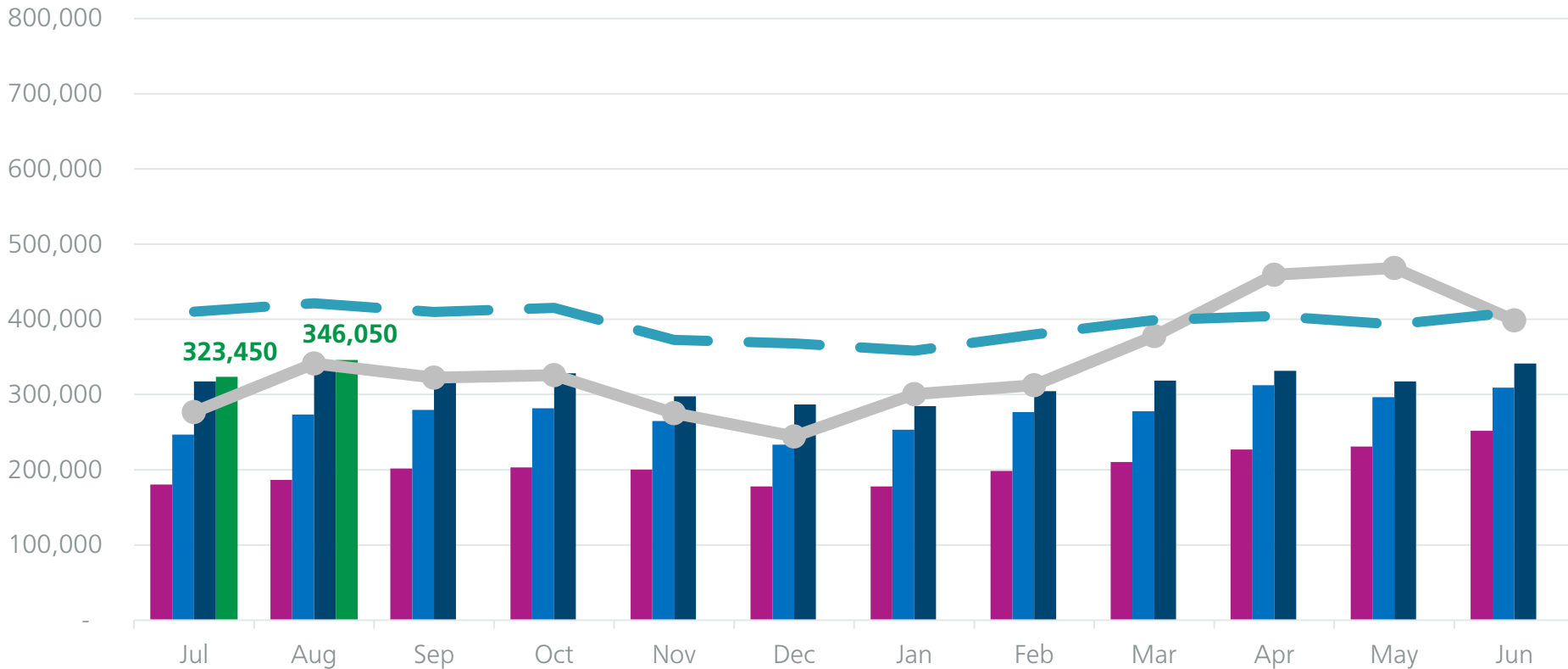
Average Weekend Ridership – FY 2022, FY 2023, and FY 2024 Actuals vs. FY 2025 Projection

Weekend ridership continues to show a year over year recovery and gets nearer to pre-pandemic ridership than weekdays. Growth is most pronounced before January. Ridership follows 2019 seasonality.

- FY 2022 Actual
- FY 2023 Actual
- FY 2024 Actual
- FY 2025 Actual
- FY24 Projection Original
- Baseline (FY 2019)

Muni Ridership Projection

Number of passengers boarded on an average weekend day in each month (Saturday + Sunday / 2)



Note: FY 2025 Projection based on Unliked Trips Estimate provided to NTD, converted to Average Weekday Ridership.

Since 2019, fare compliance has fallen from ~88% to ~80%.

At the same time, Muni expanded ways to pay:

- Muni Mobile
- Universal pass programs for Chase, Outside Lands, etc.
- Expanded monthly discount programs

Expanding payment methods that don't require tagging have contributed to the perception that more people are fare evading, even when most people are paying proper fare.

Fare Compliance Campaign

In September, the SFMTA launched a comprehensive fare compliance campaign designed to inform riders about fare programs and the importance transit fares play in keeping Muni moving.

1. **Pilot Redeployment** of Transit Fare Inspectors in September
2. **On-vehicle messaging campaign** launching later this month
3. Communicate the **importance of paying fares and impacts**
4. **Educate riders and community-based organizations** about free and reduced fare programs (focus on Lifeline)
5. Highlight the **shift from enforcement to compliance** in role of the Transit Fare Inspectors

An educational campaign on fare compliance will start this month. The messaging blast will include:

- *Paid/Earned Media*
- *Social Media*
- *Videos with TFIs and others posted to SFMTA.com*
- *Car Cards (below) highlighting ways to pay fare systemwide*

PAYING YOUR FARES KEEP US MOVING

Tus tarifas nos mantienen en movimiento / 您的票价让我们继续前行 / Ang Iyong Mga Pamasaha ay Nagpapanatili sa Amin na Gumagalaw



There are many ways to pay.
Some do not require you to tag. Fares are cheaper than fines.

Hay muchas formas de pagar. Algunas no requieren que pases la tarjeta. Las tarifas son más baratas que las multas.
/ 付款方式有很多种。有些不需要刷卡。車票比罰款便宜 /
Maraming paraan para magbayad. Hindi kailangan ng ilan na mag-swipe ka. Mas mura ang pamasaha kaysa multa.



Discounts for people with limited incomes, with disabilities and for seniors. Youth ride free.

Descuentos para personas con ingresos limitados, con discapacidad y para personas mayores. Los jóvenes viajan gratis.
為收入有限的人、殘疾人士和老年人提供折扣。青年自由行
Mga diskwento para sa mga taong may limitadong kita, may mga kapansanan at para sa mga nakatatanda. Malayang sumakay angkabataan.

Learn more at:

Tarifas sí, multas no.
/ 購買車票，免受罰款
Pamasaha muna, hindi kailanman



[SFMTA.com/HowtoRide](https://www.sfmta.com/HowtoRide)

311 Free language assistance / 免費語言協助 / Ayuda gratis con el idioma / Бесплатная помощь переводчиков /
Trợ giúp Thông dịch Miễn phí / Assistance linguistique gratuite / 無料の言語支援 / Libreng tulong para sa wikang Filipino / 무료 언어 지원

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DRAFT Joint Development Program Goals and Policy



Joint Development involves a developer using SFMTA property for non-SFMTA operational uses.



Uses include housing and commercial development. The SFMTA, the community and the developer benefit. The developer typically owns and finances the non-SFMTA uses.

The purpose of the Goals and Policy is to define the desired results of Joint Development Program and state the principles, strategies and guidelines for SFMTA to achieve those results.

Source: [HRA Advisors](#)

Joint Development

Source: Data SF City Lands https://data.sfgov.org/City-Infrastructure/City-Lands-hgvs/about_data

*Some SFMTA properties may be shared with other San Francisco agencies

-  All San Francisco Properties
-  SFMTA Properties¹



California State Parks, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies, Inc, METI/NASA, USGS, Bureau of Land Management, EPA, NPS, USDA, USFWS

Joint Development uses private investment for public good in the following ways:

Invest.

Generate substantial long-term revenues to improve our transportation system. This is a top priority.

Create Inclusive and Well-Connected Communities.

Create development projects that foster inclusive communities and improve access to opportunity and resources.

Build Sustainable and Resilient Projects.

Build development projects that improve working conditions for SFMTA staff, use green and resilient practices and reduce vehicle miles traveled and greenhouse gas emissions.

Strategies for Success

Portfolio Development

- Properties subject to the Policy using site selection considerations such as property condition and use, neighborhood context, and development potential.

Portfolio Evaluation

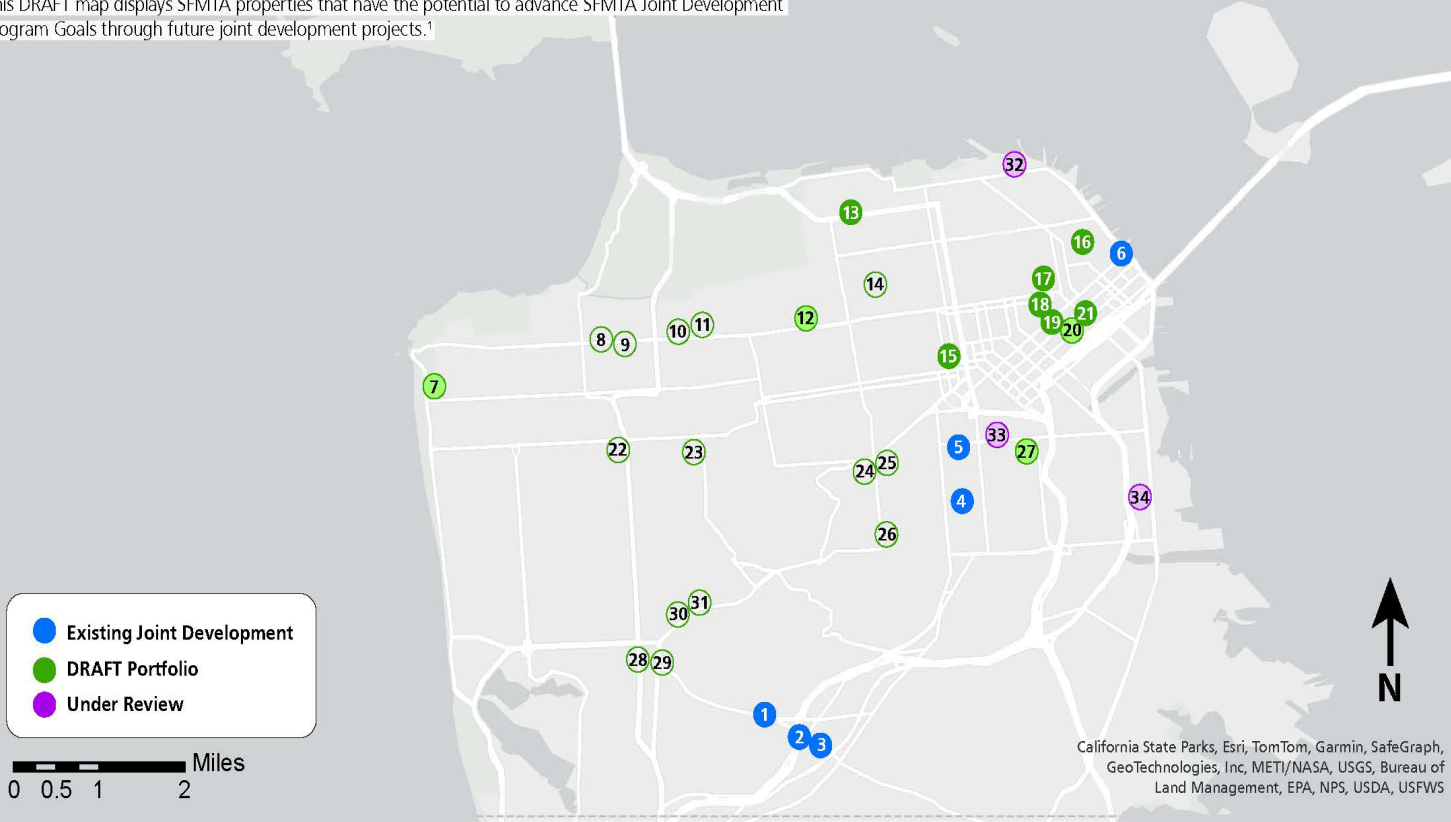
- Projections of:
 - *Land uses (residential, commercial, etc.)*
 - *Revenue to the SFMTA*
 - *Job creation*
- Consider land use experts' feedback.

Portfolio Requirements

- City affordable housing requirements on all residential sites in Portfolio.
- CA Surplus Land Act 25% affordable housing requirements across major sites in Portfolio.

DRAFT SFMTA's Joint Development Program Policy – Portfolio

This DRAFT map displays SFMTA properties that have the potential to advance SFMTA Joint Development Program Goals through future joint development projects.¹



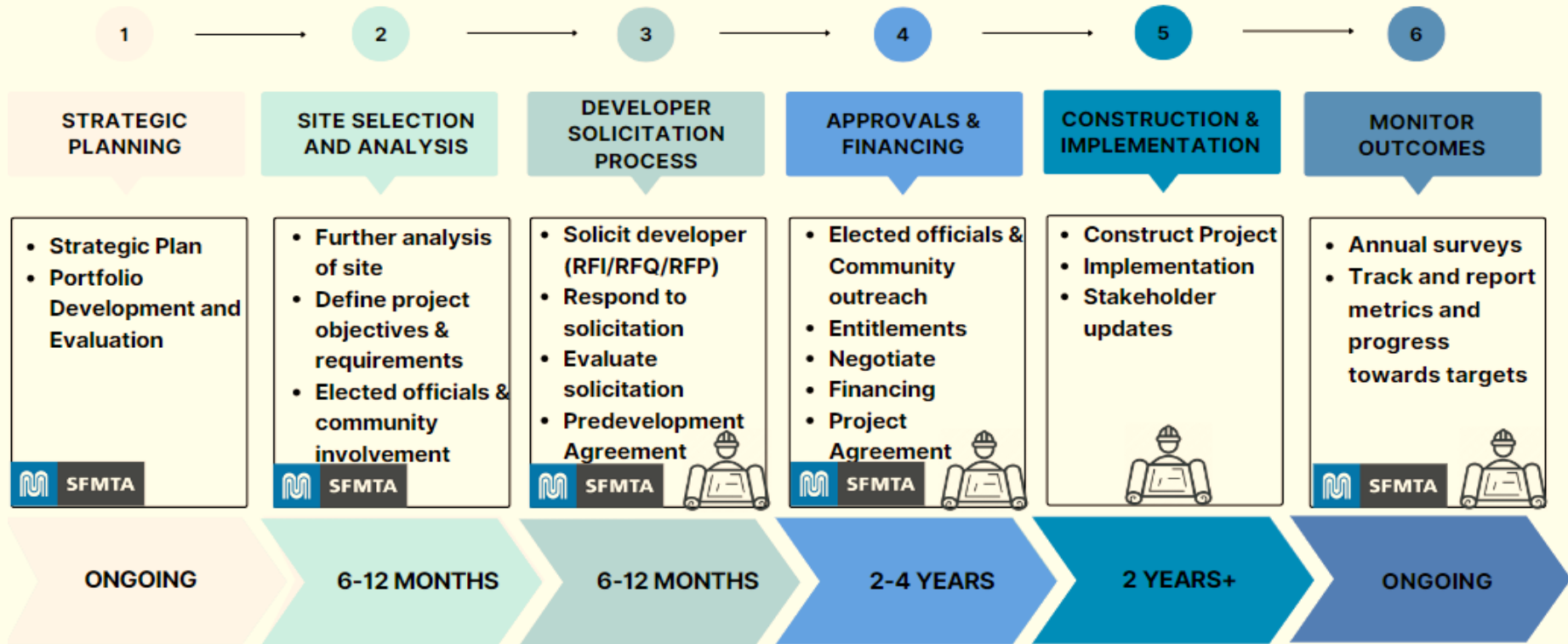
California State Parks, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies, Inc, METI/NASA, USGS, Bureau of Land Management, EPA, NPS, USDA, USFWS

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> 1 Ocean-Frida Kahlo, Residential Mixed-use 2 Balboa Park Upper Yard, Residential Mixed-use 3 Geneva Car Barn & Cameron Beach Yard, Community Center 4 Mission-Bartlett, Residential + Garage 5 Hoff & 16th Street, Residential + Garage 6 1 Hotel, Hotel Mixed-use 7 La Playa & Cabrillo Terminal Loop, 0.44 Acre 8 Geary/21st Ave. Lot, 0.17 Acre, 21 Parking Spaces 9 18th Ave./Geary Lot, 0.23 Acre, 21 Parking Spaces 10 9th Ave./Clement Lot, 0.18 Acre, 21 Parking Spaces 11 8th Ave./Clement Lot, 0.25 Acre, 26 Parking Spaces 12 Presidio Yard, 5.4 Acres, 478 Staff, 132 Transit Vehicles² | <ul style="list-style-type: none"> 13 Pierce Street Garage, 0.32 Acre, 116 Parking Spaces 14 California/Steiner Lot, 0.43 Acre, 48 Parking Spaces 15 Performing Arts Garage, 1.01 Acres, 598 Parking Spaces² 16 Golden Gateway Garage, 0.37 Acre, 1095 Parking Spaces 17 Sutter-Stockton Garage, 0.43 Acre, 1865 Parking Spaces 18 Ellis-O'Farrell Garage, 0.77 Acre, 950 Parking Spaces² 19 Fifth & Mission/Yerba Buena Garage, 2.77 Acres, 2585 Parking Spaces² 20 Yerba Buena/Moscone Station (above) & Headhouse, 0.34 Acre 21 Moscone Center Garage, 0.93 Acre, 732 Parking Spaces² 22 20th Ave./Irving Lot, 0.20 Acre, 24 Parking Spaces 23 8th Ave & Irving Street Lot, 0.28 Acre, 41 Parking Spaces 24 18th St./Collingwood Lot, 0.19 Acre, 28 Parking Spaces | <ul style="list-style-type: none"> 25 Castro/18th St. Lot, 0.19 Acre, 20 Parking Spaces 26 24th St./Noe Lot, 0.13 Acre, 16 Parking Spaces 27 Potrero Yard, 4.4 Acres, 465 Staff, 158 Transit Vehicles² 28 19th Ave./Ocean Lot, 0.18 Acre, 20 Parking Spaces 29 Ocean/Junipero Serra Lot, 0.19 Acre, 20 Parking Spaces 30 West Portal/14th Ave. Lot, 0.14 Acre, 19 Parking Spaces 31 Ulloa/Clairemont Lot, 0.30 Acre, 23 Parking Spaces 32 Kirkland Yard, 2.6 Acres, 338 Staff, 188 Transit Vehicles 33 Flynn Yard, 6.2 Acres, 424 Staff, 119 Transit Vehicles 34 Woods Yard, 8.2 Acres, 856 Staff, 204 Transit Vehicles |
|---|---|--|

1. These properties are currently necessary for SFMTA uses. Inclusion in the Portfolio does not make it Surplus Land as defined by the Surplus Land Act.

2. These properties are subject to Portfolio Requirements for parcels at one-half acre or larger. The Director of Transportation may amend to include only a portion of these properties in the Portfolio based on SFMTA needs.

Draft Policy – Joint Development Program Guidelines



The proposed Policy provides the SFMTA flexibility in its use of revenue. Joint development at facility sites could support financing rebuilt facilities.

Scenarios	Annual Estimated Revenue By 2050			
	# of Projects	Ground Lease Rent	TIF	TOTAL
<i>Low</i>	5	\$15.6M to \$18.4M	\$1.1M to \$3.1M	\$16.7M to \$21.5M
<i>Moderate</i>	7	\$26.3M to \$31.5M	\$2.6M to \$7.3M	\$28.9M to \$38.8M
<i>High A</i>	12	\$29.8M to \$35.8M	\$3.0M to \$8.4M	\$32.8M to \$44.2M
<i>High B – more density @ some sites</i>	12	\$34.6M to \$42.3M	\$3.7M to \$10.3M	\$38.3M to \$52.6M

Source: Hatch, SFMTA 2024

- All estimates are based on a draft, preliminary study of potential revenue from select sites in the Joint Development program. This initial study is based on a range of programmatic and financial assumptions provided by SFMTA and consultant, including improved market conditions such that development is feasible. No detailed estimation or assessments have been conducted for selected sites. Actual revenues are heavily dependent on site, environmental, and market conditions at time of development, among other factors.
- Dollar values are presented in 2024 dollars. M = millions of dollars.
- Ground lease rent estimates represent a range of potential minimum payments and participation rents to the SFMTA. 1 Hotel revenue is estimated in all scenarios based on existing terms and anticipated participation rents. The SFMTA would negotiate ground lease rents for selected sites with a developer and the actual rents will fluctuate from site to site based on location, desirability, assessments, market conditions at time of negotiations, among other factors.
- If a selected site has existing positive revenue from commercial tenants or parking, then the ground lease rent analysis subtracts the revenue lost from improvements due to Joint Development.
- Tax Increment Financing (TIF) is a range to represent the estimated amount the SFMTA could capture from property tax increment gains from Joint Development because of local legislation and policy.
- This initial study does not assess development or construction costs of the selected sites or if SFMTA's operational costs would change. Operational cost decreases could occur from less staff or with fewer contracts for managing and maintaining the selected sites developed under the Joint Development Program. Operational cost increases could result from more staff for Joint Development solicitation, approval, and management processes and for preparing and administering tax increment financing.

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Conclusion

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Transparency, advocacy and education will be key to getting Muni to financial sustainability.

SFMTA cannot sustain its current level of service when federal and state relief funds run out.

It will take a program of initiatives to ensure the SFMTA can continue to deliver.

An aerial photograph of a city street intersection. In the center, a large rectangular area is under construction, showing dirt, rebar, and some equipment. The surrounding area is filled with various buildings, including a prominent white classical-style building on the left and several modern high-rise buildings with glass facades. A red-paved transit lane runs through the center of the street. The text "Thank you." is overlaid in a large, white, sans-serif font across the middle of the image.

Thank you.

Bank of A



Appendix

Transportation 2050 Actions

Presented at the October 1st, 2024 MTA Board Meeting

T2050 MTAB Update December 2023:

<https://www.sfmta.com/media/37746/download?inline>

State of Good Repair Report:

<https://www.sfmta.com/media/37744/download?inline>

Unconstrained Capital Plan Report:

<https://www.sfmta.com/media/37745/download?inline>

SFMTA Focus Group Results Analysis

Summary of Focus Groups Conducted in July 2024



OPINION
RESEARCH
& STRATEGY

Research Approach and Focus Group Composition

- Each focus group consisted of a two-hour moderated conversation with 8-10 San Francisco voters, covering the top issues facing the city, views on Muni, and views on Muni funding.
- Respondents were recruited to fit the profiles below, while otherwise being generally representative of San Francisco's demographics by age, gender, race/ethnicity, geography, socioeconomic status, and political ideology.

Group Profile	Date
Westside Voters	July 9
Eastside Voters	July 9
Cantonese-Speaking Voters	July 10
Muni Riders	July 10

Cautions in Interpreting Results from Qualitative Research

- Qualitative research does not measure directly the frequency by which opinions and attitudes may exist within a particular universe of people.
- Accordingly, the results of these panels may be considered suggestive of the attitudes of San Francisco voters, but cannot be considered to represent their views with any kind of statistical precision – even on questions where their views are quantified.
- However, they do provide helpful insights into language, core values and the “why” behind voter opinions.



Key Findings

1. San Franciscans feel negative about the direction of the city and **are highly worried about homelessness, safety and drug use.**
2. Participants highly **value Muni and say it is convenient and affordable.**
3. However, their **concerns about reliability, safety and cleanliness** color their perceptions of the transit system.
4. Their general skepticism toward government leads them to assume that Muni is not well-managed, even though **few know about the agency's funding challenges.**
5. Visible **fare evasion is highly concerning and frustrating** for San Franciscans.
6. The **concerns about cleanliness, safety, and fare evasion** affect their willingness to support funding proposals.
7. Support for funding proposals is driven by how **highly they value Muni as a convenient and accessible community asset.**
8. Opposition is driven by **tax fatigue, high cost of living, and a perceived lack of financial accountability** by the agency.
9. While they say many of the funding mechanisms are “unacceptable” they were **willing to accept some changes to improve efficiency, issue G.O. bonds, and raise the cost of parking.**
10. The most compelling messages describe **the fiscal cliff faced by the agency and the improvements to personal safety that could be made with more funding.**

Views on SFMTA and Muni

- Most participants indicated that they ride Muni regularly, to commute, run errands, and for recreational activities.
- They view Muni as highly convenient and affordable; more frequent riders noted that Muni had improved in recent years.
- Their biggest concerns regarding Muni were cleanliness and feeling unsafe on trains and buses.
- While virtually everyone worried about safety, this sentiment was especially pronounced in the Cantonese group, who feared falling victim to hate crimes.
- Participants did not associate SFMTA and Muni and tended to think of SFMTA primarily in terms of parking enforcement.
- Few were familiar with Muni's budget crisis, only those who followed the news closely had heard of the agency's financial challenges.

...about over ten years ago. At that time, we don't worry about safety on the street. We don't have Asian hate, no such thing in those days. We didn't have to look out for that kind of thing, and I never thought I would feel unsafe. – Cantonese Participant

Yeah, I guess if you're expanding [the discussion to] MTA, not just Muni, a lot more issues come about with wasteful spending. – Westside Participant

They are in a budget crisis and they need to borrow money. They have to make decisions to cut lines or cut drivers. Cut lines or cut services some. Make the hard decisions. – Muni Rider

Fare Evasion

*My feeling is that the fare enforcement needs to be increased because I think Muni is losing a lot of money from people not paying their fares and it's also making other problems. It makes it more crowded, makes it less safe. There's a lot of issues that come with not enforcing fare price and it used to be, years ago, where you didn't get on the bus without paying and I thought it was much better. – **Westside Participant***

*You have to fix the fare evasion first. People don't pay, they don't care. I don't care. I am graffitiing, probably stealing, dirtying the bus. – **Muni Rider***

- Fare evasion is a highly visible problem and many expressed frustration with it.
- They found the lack of accountability unfair for paying riders and were concerned by Muni's lack of action to address the problem.
- They also felt that enforcing fare would improve safety and cleanliness on transit.
- Critically, the high awareness of fare evasion colored how they viewed Muni's fiscal situation and willingness to support revenue proposals.
- They mentioned it often when reviewing funding proposals and it was clear that they wanted to see progress before paying more in fees, taxes, or fares.
- At the same time, there wasn't a strong sense that greater presence of Muni staff would serve as a deterrent.

Reactions to the Proposed Bond Measure

- Participants were supportive of the measure's goals by 21 to 10 but offered little enthusiasm.
- They felt that the measure sought to address a wide number of issues and lacked focus – which worried them that it would not deliver on promises.
- Some expressed tax fatigue and a desire to understand what had already been done before approving new bonds.
- The fiscal language was confusing for many, in particular the Cantonese group struggled to understand the term “general obligation bond.”
- Few were aware of the City's policy of only issuing new bonds as existing ones expired.

We need a watchful eye on those managing funds.
– **Muni Rider, Probably Yes**

It's painful to see this as a property owner.
– **Eastside Participant, Probably Yes**

Too much inefficiency, wasteful spending. We need transparency of where money is going and to what use and taxes are already too high.
– **Westside Participant, Definitely No**

Undecided because I'm wary this would actually happen. Feels like fare enforcement is a better way to get their money. – **Eastside Participant, Undecided**

Evaluating Muni Funding Proposals

For each item please indicate whether you would find it completely acceptable, somewhat acceptable, somewhat unacceptable, or completely unacceptable as a way of dealing with Muni's funding needs.

Funding Approach	Total Acceptable	Total Unacceptable
Expanding the tax paid by ride hail vehicles, such as Uber, Lyft and Waymo, operating in San Francisco	25	12
Increasing parking fees in San Francisco	15	23
Expanding metered parking hours in San Francisco	15	23
Increasing bridge tolls	14	24
Raising fares on Muni	13	25
Scaling back the number of routes Muni operates	11	27
Reducing the frequency of Muni buses and trains city wide	7	31

Views of Funding Proposals

- Participants viewed expanding a tax on rideshare companies as the most acceptable funding proposal.
- In contrast, reducing Muni frequency was overwhelmingly seen as unacceptable by participants as it was one of the areas of Muni service that is most important to them.
- Scaling back the number of routes was more acceptable than reducing frequency because participants thought there were ways to make the system more efficient by combining routes.
- Participants also felt that higher fares were unfair given the high rates of fare evasion.
- While most indicated the proposals were “unacceptable” in their workbooks, during the discussion they indicated an openness to scaling back routes and to the parking proposals.

I think it's what's the core of public transportation. What are the things I don't want to budge on and that is like it should be free. It should be reliable, it would be easy to get, and it should be safe.

– Eastside Participant

Some routes are kind of unnecessary. There are some buses that kind of go to the same place, just a little bit different. Some buses are empty all the time. The neighborhood doesn't need it. – Muni Riders

Reactions to Parking Proposals

- Require parking meter payment into the evening
- Require parking meter payments on Sunday
- Expand paid parking to all neighborhoods in the city
- Expanding paid parking to popular areas like parks and beaches, along with commercial areas
- Increase charges for residential parking permits
- Require paid parking for visitors on residential streets (where permits are required for residents)

I think if parking meters become ridiculously expensive, will that push me into taking public transit more? Possibly. And I don't mind that.

– Eastside Participant

- In general, participants were reluctant to accept higher parking costs.
- Participants viewed increasing the cost of residential permits, expanding paid parking to popular areas and to other areas of the city as most acceptable.
- Requiring paid parking on evenings and Sundays was a nonstarter.
- Participants expressed greater comfort with higher parking costs if they knew the funds went to Muni, although they did worry about funds being used accountably.
- They also acknowledged that higher parking costs would affect their driving habits and reduce the amount they drive.

Messages in Favor of Muni Funding Proposals

Ranked by Times Chosen as Top Three Message

34

(FUNDING CUTS) The state is facing a \$27 billion deficit this year, and the governor has proposed millions in funding cuts to the SFMTA that will severely reduce local public transportation services. We need to create local sources of revenue that can't be taken by the state in order to ensure that we can continue to provide for our residents regardless of what happens at the state or federal level.

27

(PERSONAL SAFETY) Many people do not ride transit because they worry about their personal safety. Investing in our transit system will allow Muni to hire more staff to deter crime and bring more people back onto public transportation, making it safer for everyone.

17

(FISCAL CLIFF) Federal relief funds are much of what's kept Muni running the past few years, but despite drastic reductions in spending and efficiency improvements, Muni funding is running out. Starting in 2026 the SFMTA will face a deficit that exceeds \$200 million. Without additional funding, Muni will have to make cuts to service and stop projects that improve rider and worker safety.

16

(VISION ZERO) San Franciscans deserve to walk and bike safely in their neighborhoods without the fear of being seriously injured or killed by a car. Investing in Muni's frequency and reliability and in safety for people walking and bicycling in all San Francisco neighborhoods will help us achieve a future without traffic collisions, injuries and deaths.

For more information,
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OPINION
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RIDERSHIP SURVEY 2024

*Conducted for the San Francisco
Municipal Transportation Agency*

KEY FINDINGS

February to April 2024



Prepared by

**COREY, CANAPARY & GALANIS
RESEARCH**

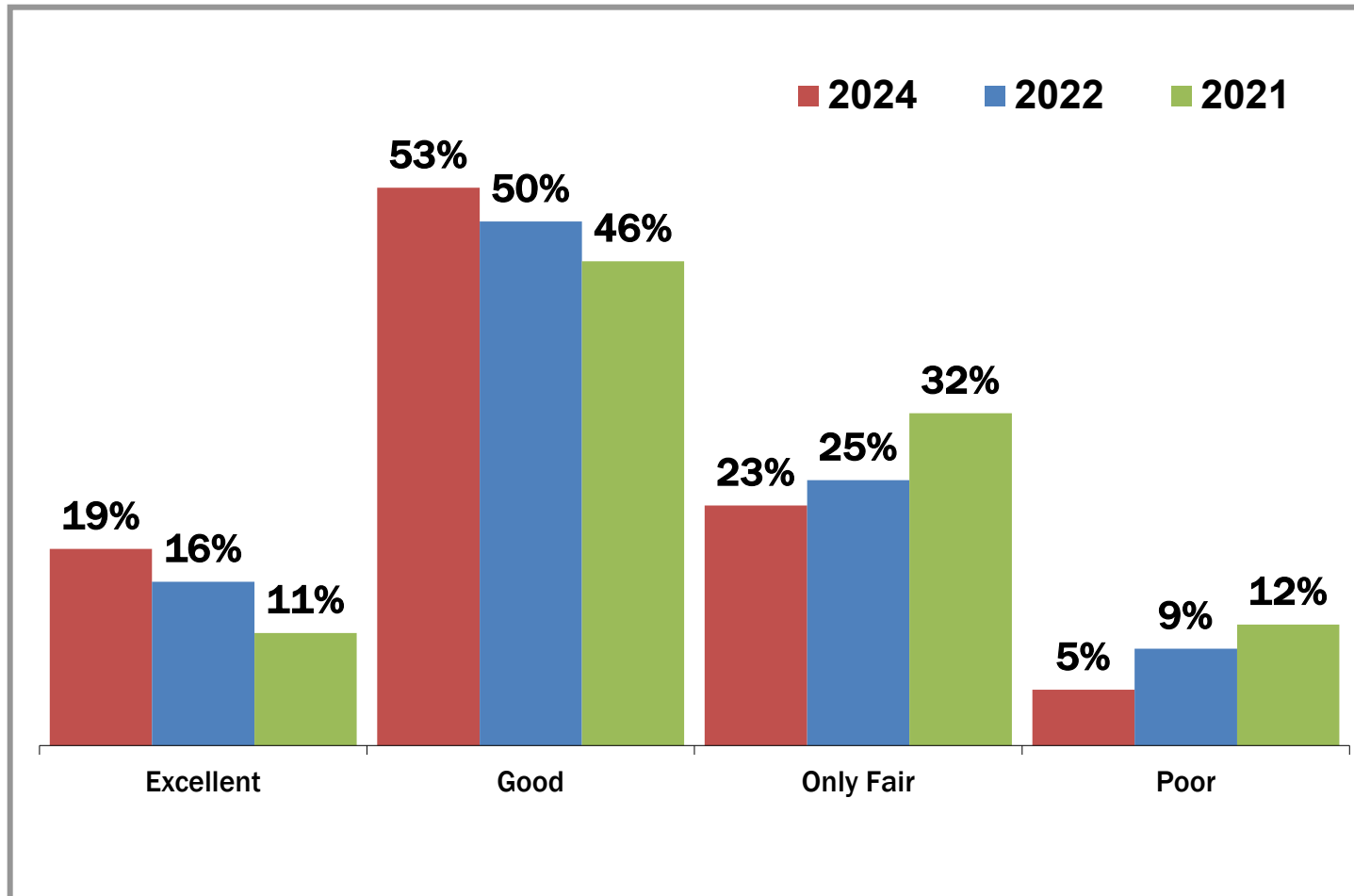
San Francisco, California

SURVEY DETAILS

TECHNIQUE	Telephone interviewing and Self-administered online survey
FIELD DATES	Field work conducted in February through April 2024
INTERVIEWS	553 total completed interviews 311 (56%) telephone, 242 (44%) online
SAMPLE FRAME	Current adult residents of San Francisco. A hybrid cell phone/RDD sample was utilized to contact county residents. Online sample was residents who had registered with SFMTA. Interviews were conducted in English, Spanish, and Chinese.
MARGIN OF ERROR (at 95% confidence level)	+/- 4.1% for total sample (n=553)
NOTES	Responses are rounded to the nearest whole percentage. On some questions, the percentages may not add up 100% because of statistical rounding.

OVERALL RATING OF MUNI SERVICE – THREE YEAR COMPARISON

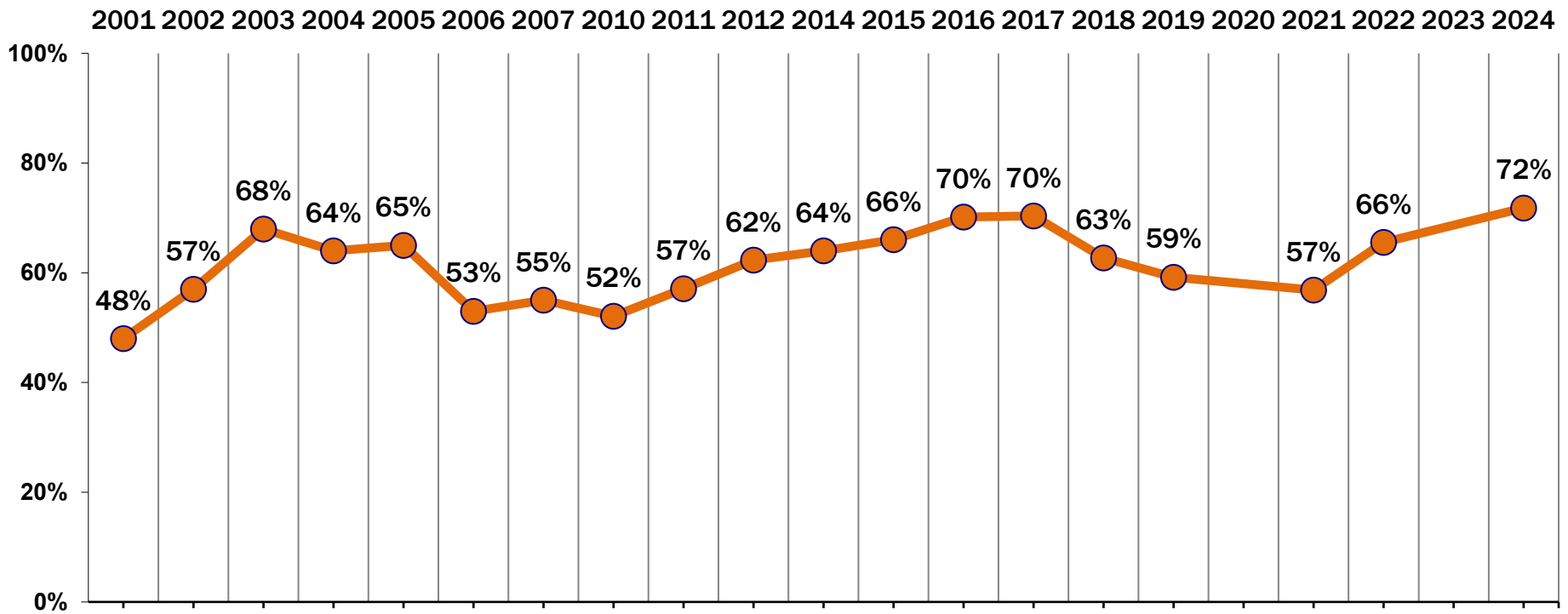
Overall, how would you rate Muni’s service? Would you say...



OVERALL RATING OF MUNI SERVICE - TRENDING

Overall, how would you rate Muni's service? Would you say...

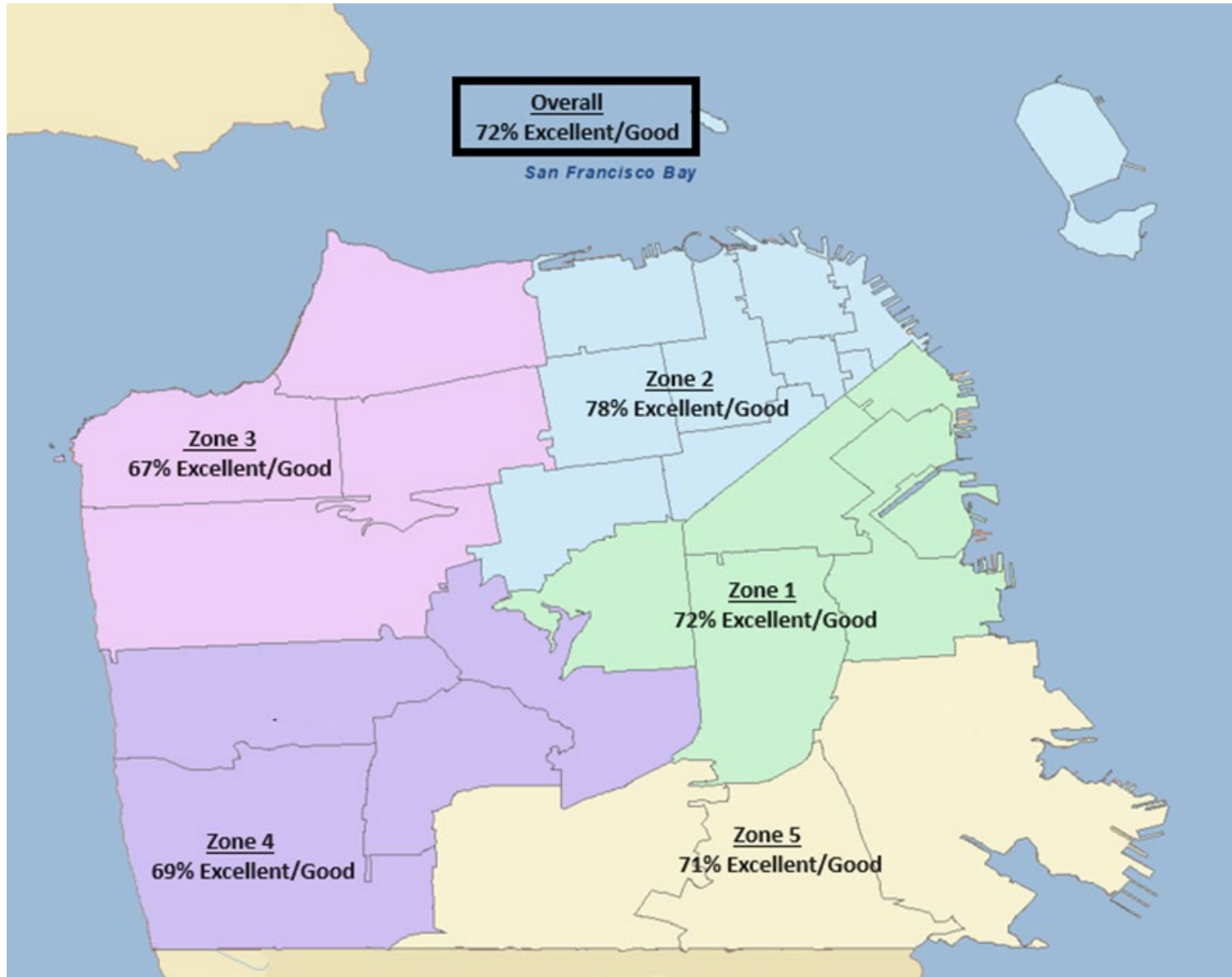
Trending: Overall Rating of Muni Service
Excellent and Good Ratings Combined



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. Survey was not conducted in 2020

OVERALL RATING OF MUNI SERVICE – GEOGRAPHIC DISTRIBUTION

Overall, how would you rate Muni's service? Would you say...



RATING OF SPECIFIC MUNI ATTRIBUTES

Now I would like to ask about the Muni’s performance in different areas. For each area I read, please tell me whether Muni does an excellent job, a good job, a fair job, or a poor job in this area.

	(% saying <u>excellent</u> or <u>good</u>)		
	2024	2022	2021
Providing access for people with disabilities.....	81%	81%	79%
Helpful drivers/operators^.....	75%	73%	70%
Trips taking a reasonable amount of time.....	69%	65%	57%
Providing accurate arrival estimates^.....	64%	49%	45%
Providing frequent service^.....	63%	51%	45%
Providing reliability (on-time performance)^.....	60%	47%	42%
Cleaning Muni Vehicles.....	58%	57%	60%
Communication with the public.....	52%	51%	50%
Safety and security from crime while onboard or waiting for Muni	44%	42%	38%
Managing crowding on Muni vehicles.....	42%	37%	38%

Base: 2024 All Riders (n=498)

^ In 2022, these were phrased as “Operator (driver) helpfulness”, “Accurate arrival predictions”, “Frequency of service”, “Reliable / On-Time performance”.

RATING OF SPECIFIC MUNI ATTRIBUTES

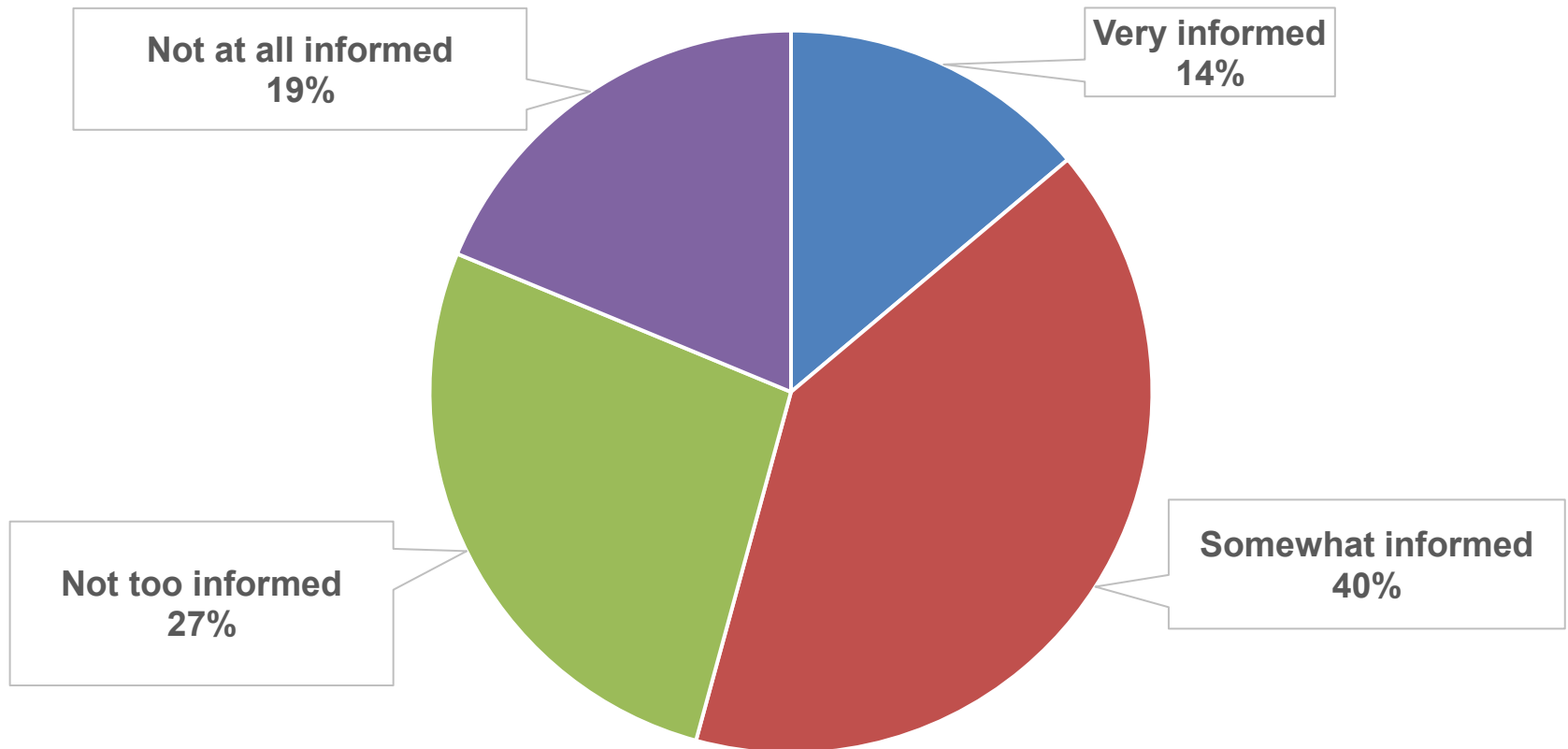
QUADRANT CHART



COMMUNICATION

UPDATES AND INFORMATION

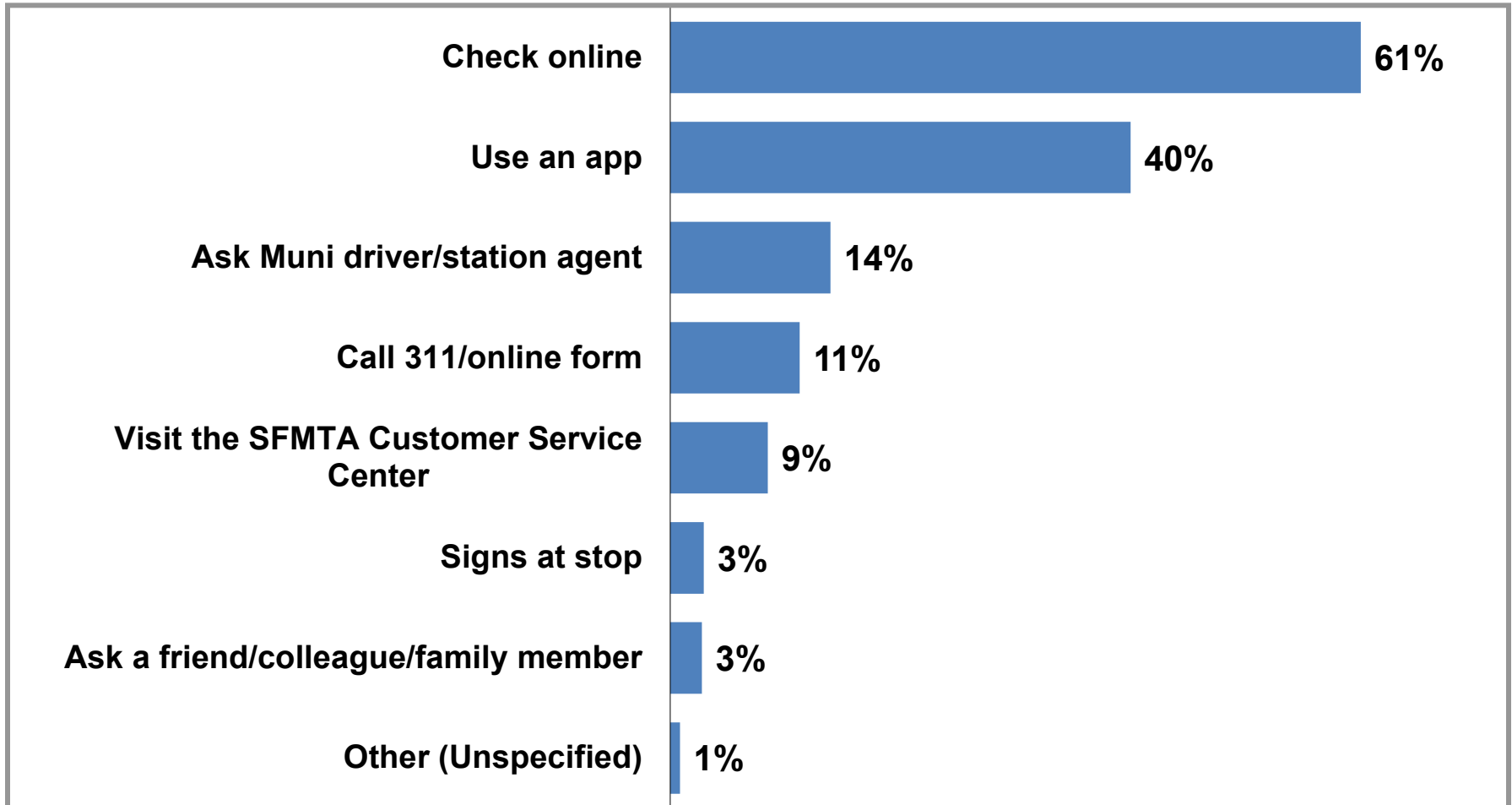
How informed do you feel about Muni projects, enhancements, and service updates?



MUNI INFORMATION SOURCES

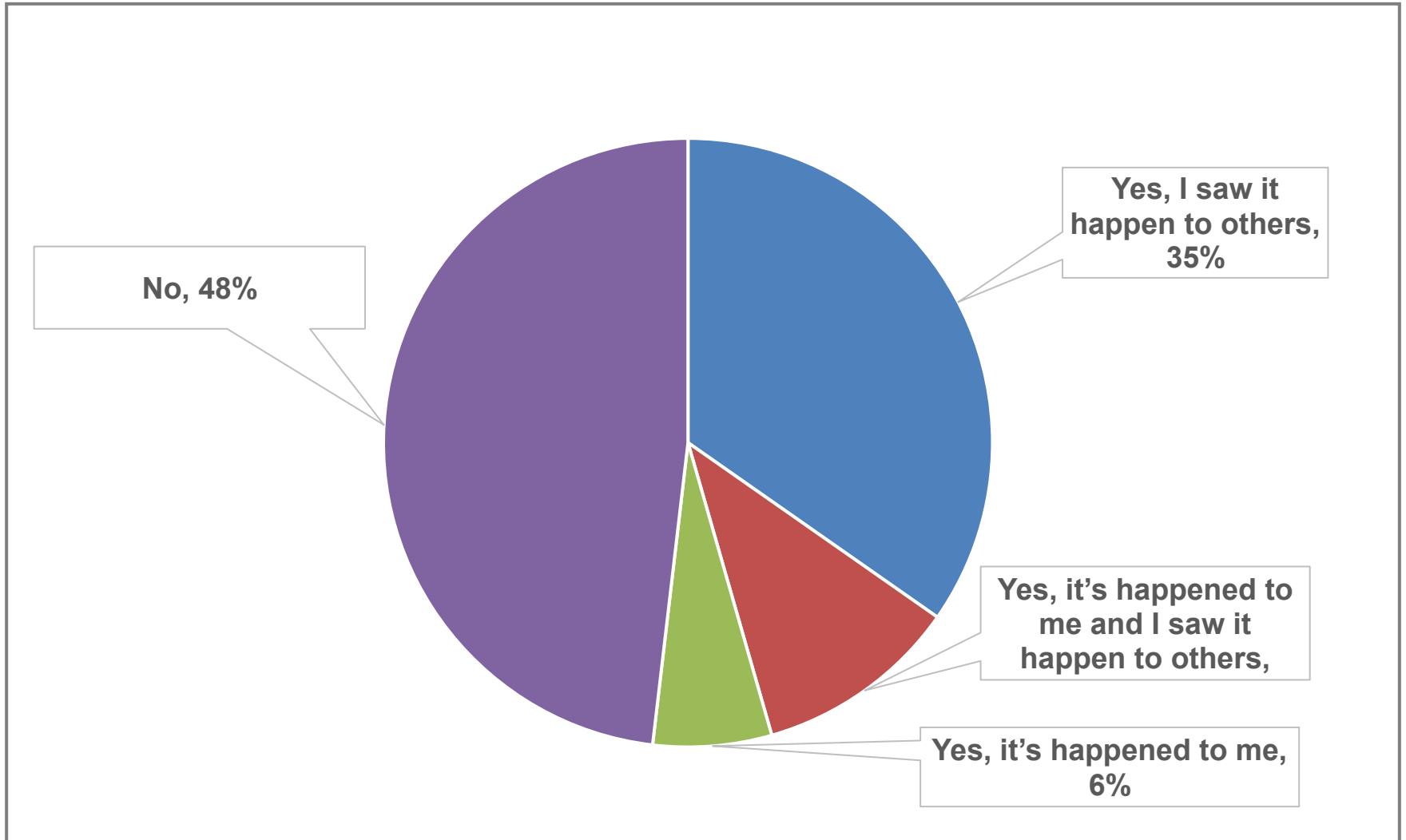
If you needed information about Muni, how would you obtain this information?

(Open-Ended. Multiple Responses Accepted)



HARASSMENT

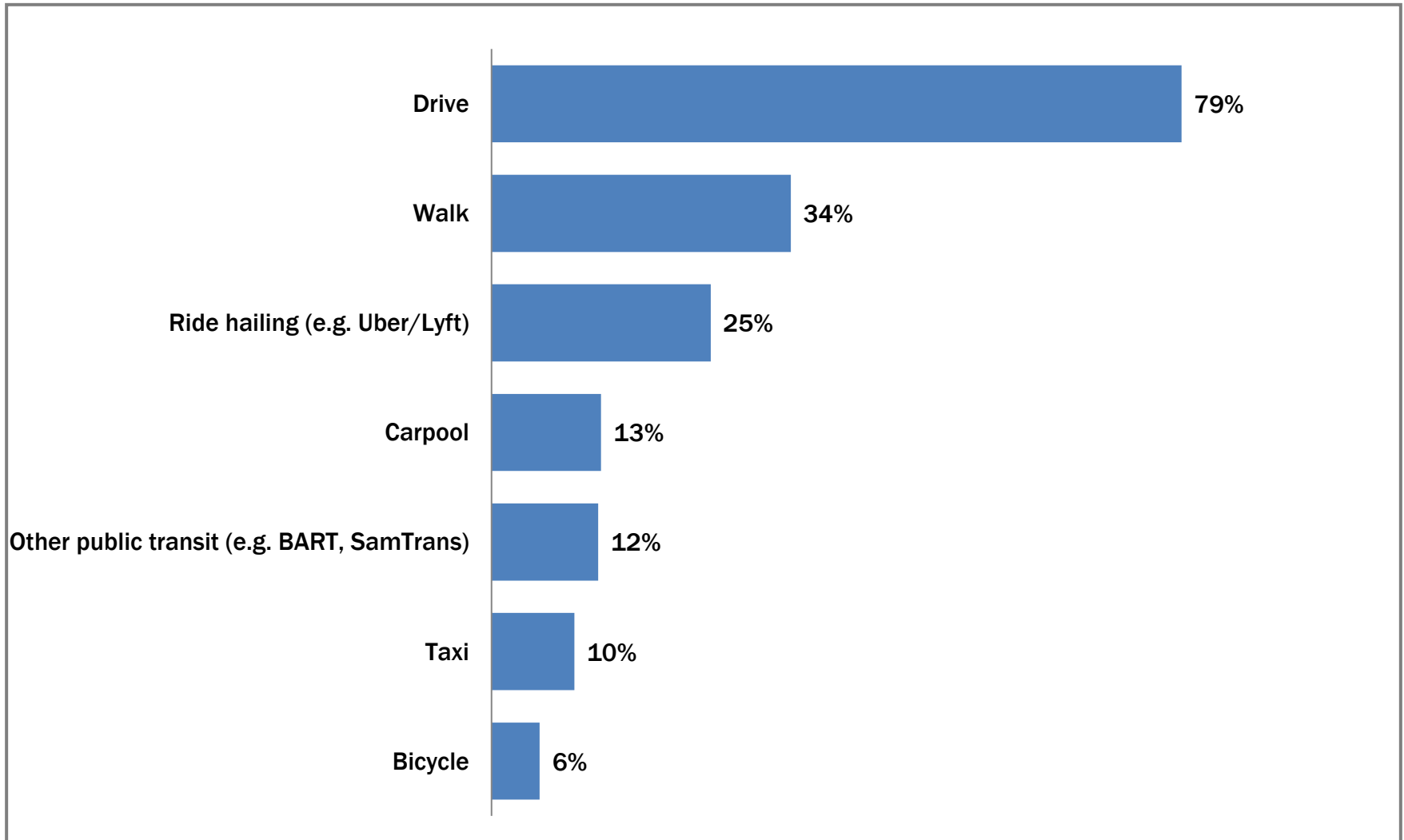
HAVE YOU SEEN OR EXPERIENCED HARASSMENT WHILE USING MUNI IN THE PAST YEAR?



NON-MUNI TRIPS

ALTERNATIVE MODE – NON-RIDERS

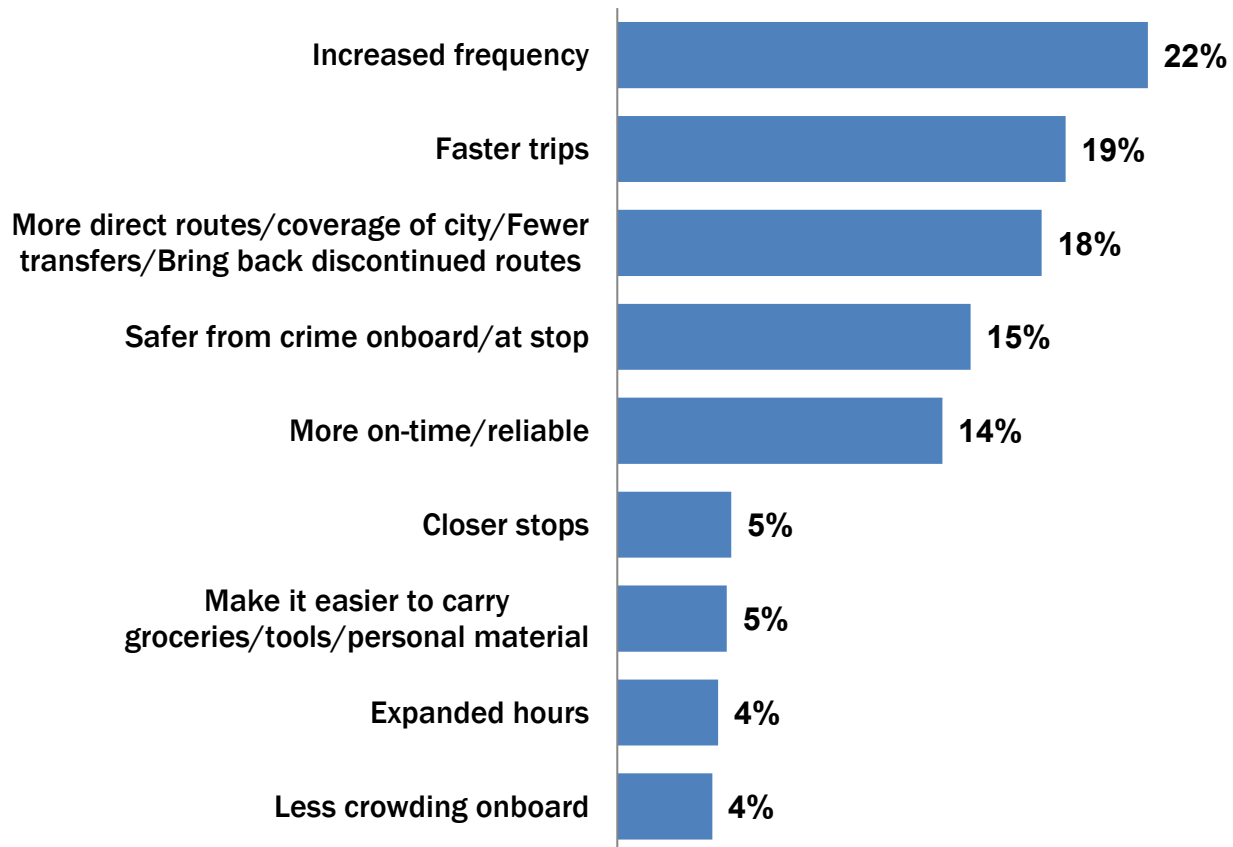
What mode(s) of transportation are you using now instead of Muni?
(Open-Ended. Multiple Responses Accepted)



Base – Have not ridden Muni in the past three years (N=55)

INCENTIVES- NON-MUNI TRIPS – ALL RESPONDENTS

What could Muni do to get you to try transit for this type of trip?*(
(Open-Ended. Multiple Responses Accepted)



*Partial list, only responses 4% or greater overall are shown, see crosstabulated tables for complete list
Base: 2024 All Respondents (n=553)