



# Muni Update

SFMTA Board of Directors  
June 6, 2023





# Focusing on Quality

for management of the system and deployment of resources leading to gains in performance and customer feedback

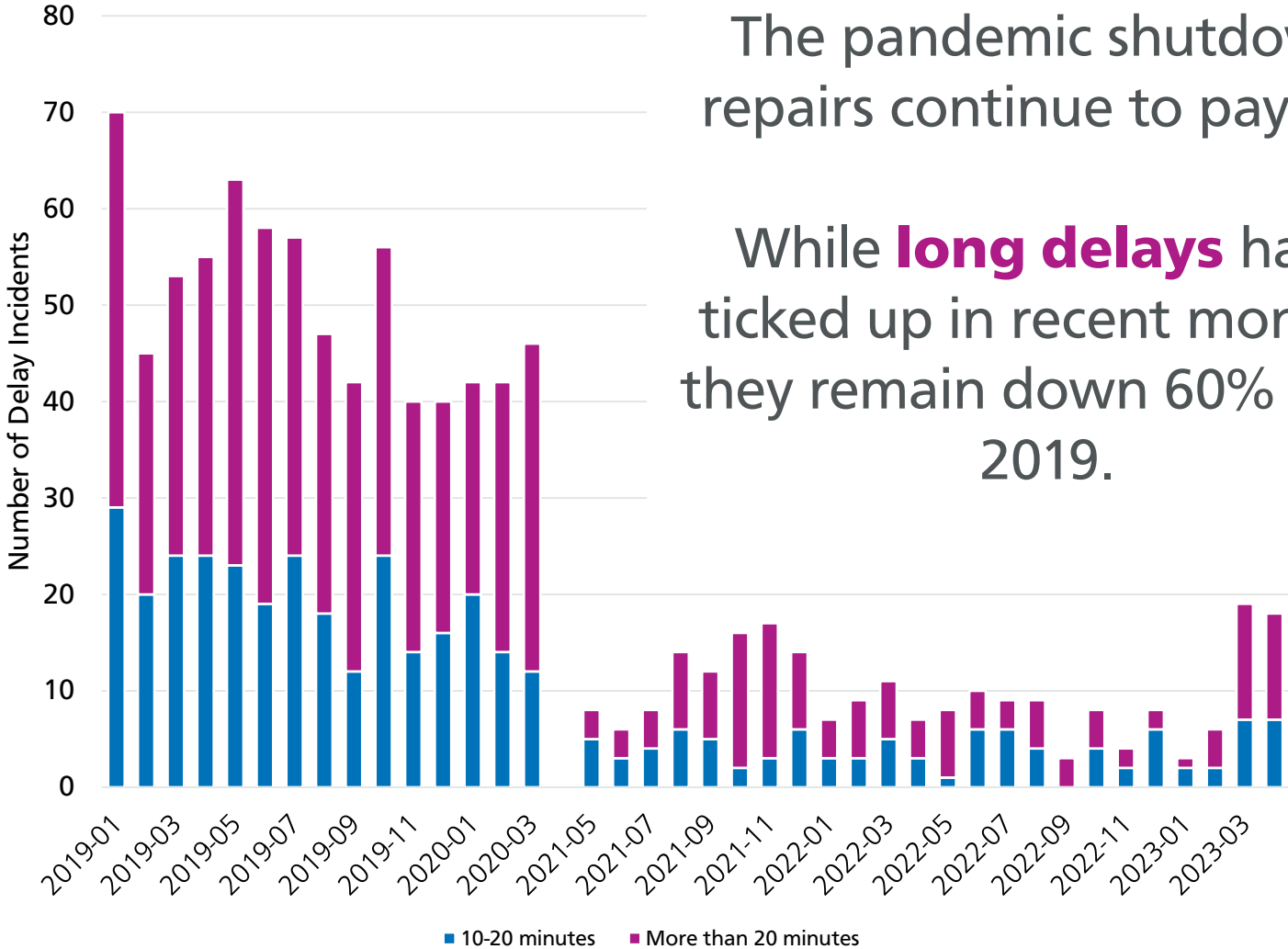
# Headway Management

Customers experience shorter waits and fewer service gaps due to proactive service management and fewer missed buses and trains

- Headway adherence for bus/rail service has steadily improved since December 2022
- All service categories above 85%
- Rapid bus and high frequency lines above 90%



# Market Street Subway Delay Events



The pandemic shutdown repairs continue to pay off.

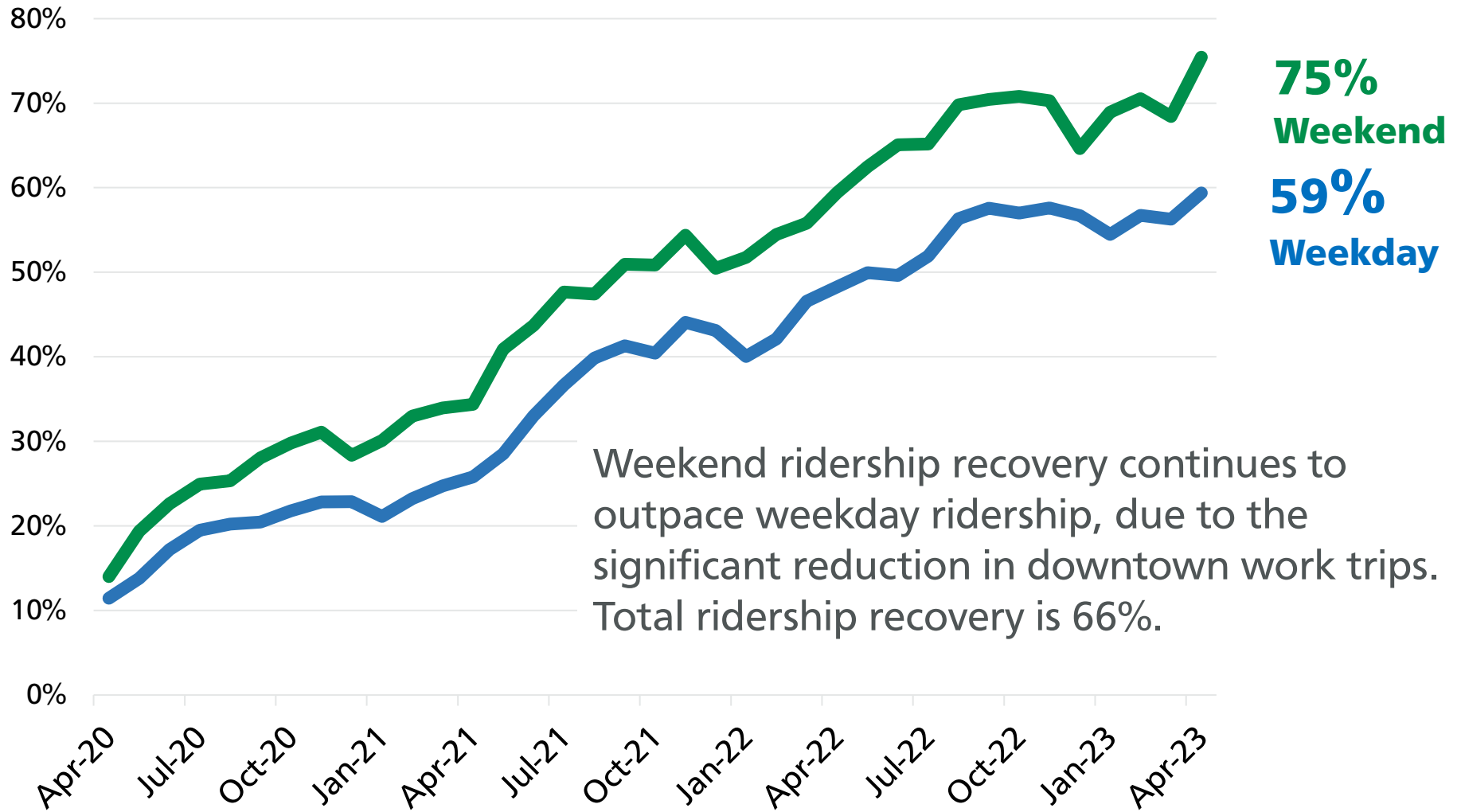
While **long delays** have ticked up in recent months, they remain down 60% from 2019.



# Customer Experience Investments



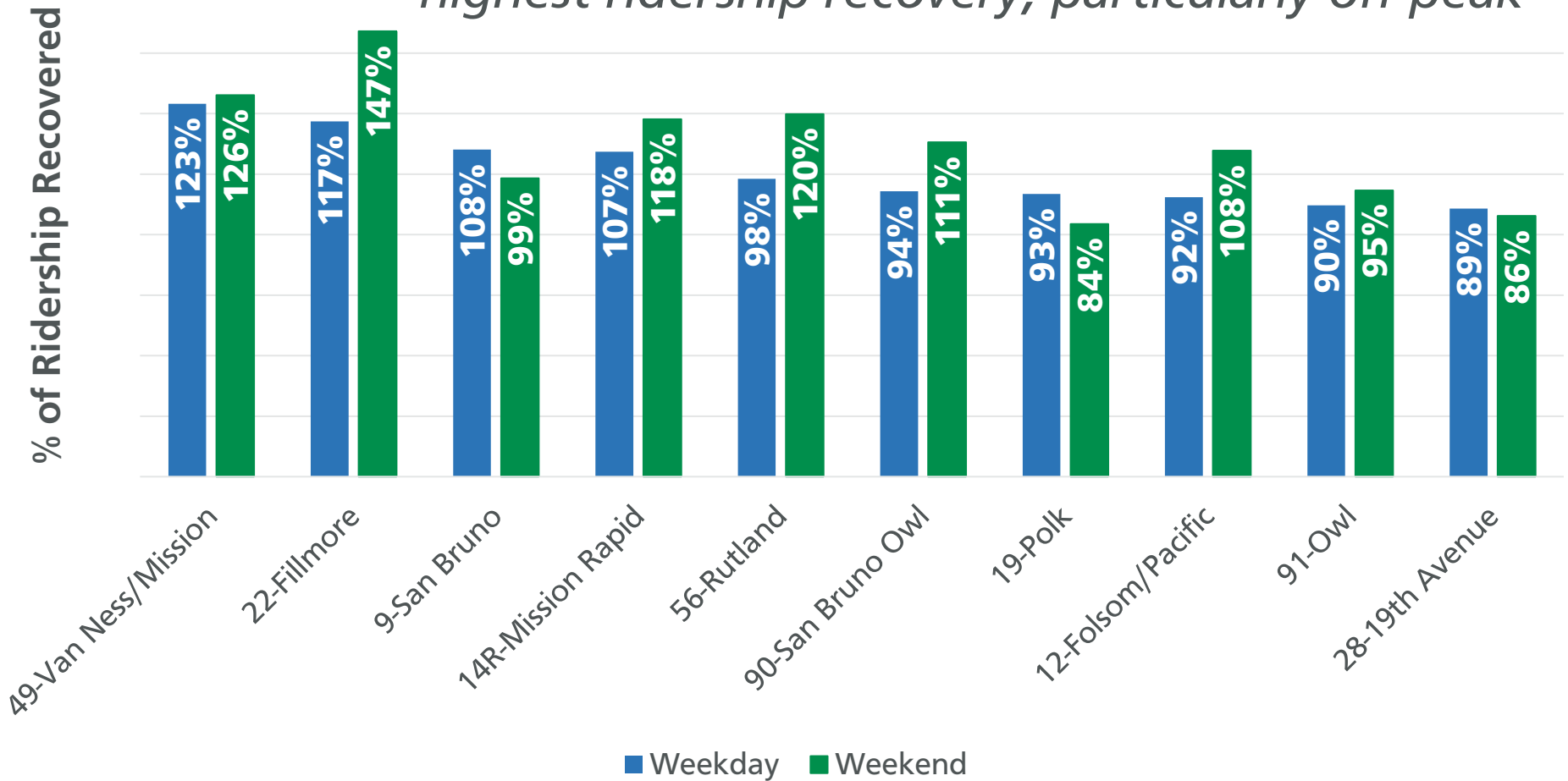
# Weekday and Weekend Ridership Trends



# Highest Ridership Recovery Routes

## April 2019 vs April 2023

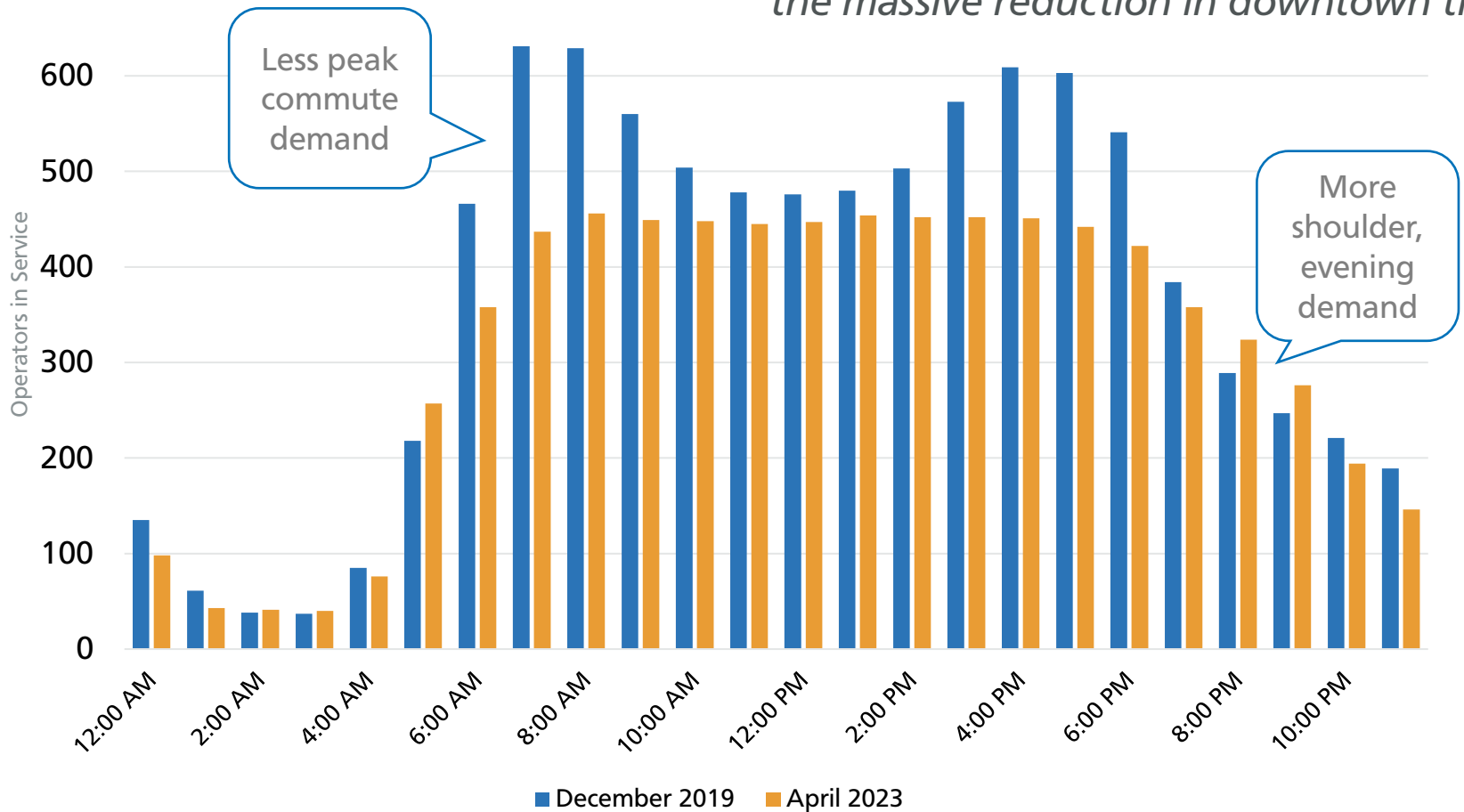
*Lines connecting neighborhoods are seeing highest ridership recovery, particularly off-peak*



■ Weekday ■ Weekend

# Adjusted Muni Service to Meet New Demand Patterns

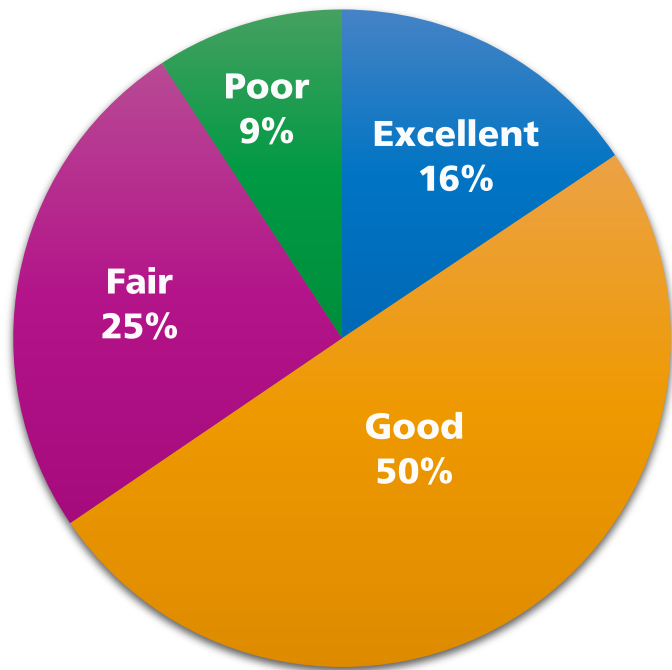
*Service during non-commute hours is 90-110% of pre-pandemic levels.  
Commuter service is ample and is scaled to reflect the massive reduction in downtown trips.*





# Riders are Noticing the Quality of Muni service

*Overall, how would you rate Muni's service?*



Source: 2023 SFMTA Ridership Survey

**66% of Muni riders rate service as good or excellent, +9% from 2021**

— 2023 SFMTA Ridership Survey

**Muni at highest rating since 2013**

— The City Survey, 2023

**Top 5 North American cities for riders most likely to recommend their public transit system to a friend**

— Transit App's North America Transit Rider Happiness Benchmarking Survey



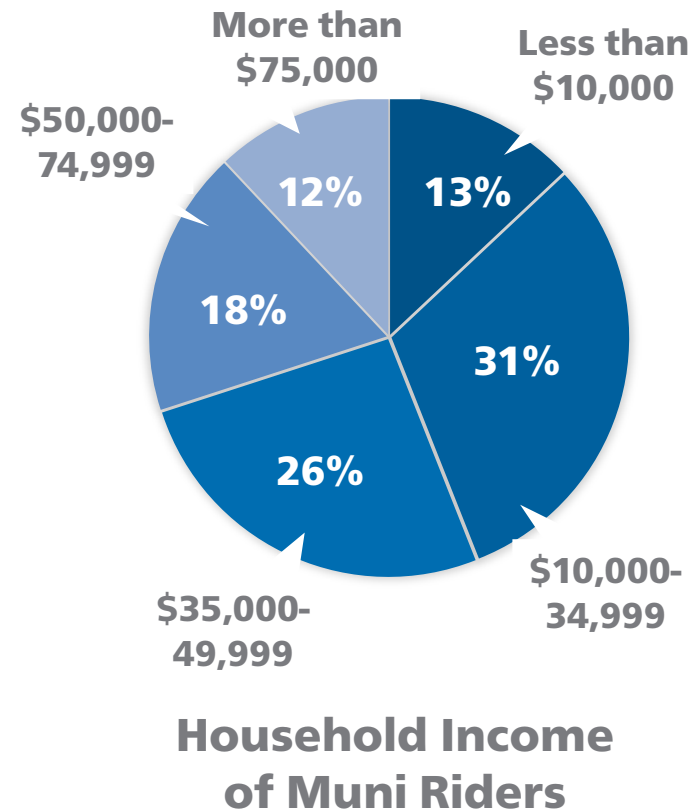
# Current revenue conditions

requires modifying approach to service changes to maintain quality of Muni service

# Quality Muni Service Matters

Muni service impacts hundreds of thousands who depend on Muni every day

- More than 50% of public transit trips in the Bay Area are on Muni, currently and pre-pandemic
- 70% of riders' households make less than \$50,000/year
- 57% of riders are people of color



Source: 2017 Systemwide On-Board Survey



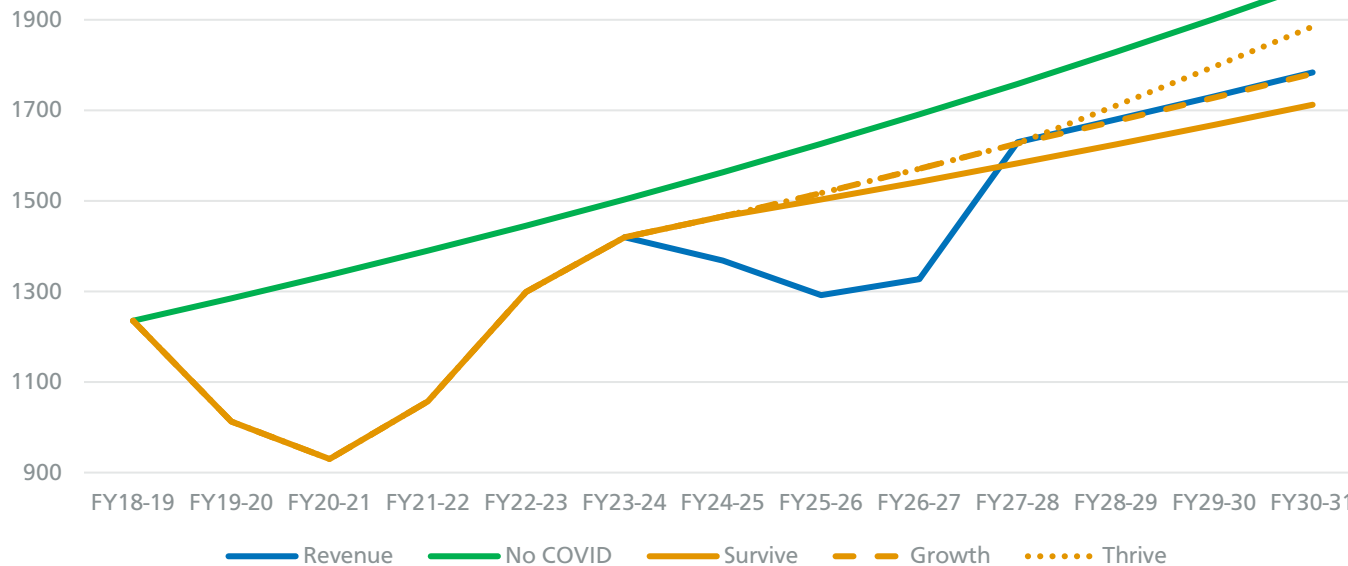
# Quality Muni Service Matters

- Economic recovery...
- Climate action goals...
- Social equity goals...
- San Francisco's livability and vibrancy...

***... all depend on  
quality Muni service!***



# Financial impacts to Muni service



- In response to current revenue projections, SFMTA is pursuing parking meter changes and limiting hiring to priority positions
- As part of our updated hiring plans, we recommend a revenue neutral service model, which shifts resources to more crowded routes
- If new revenue sources are not identified, service reductions will be needed at the scale of the pandemic

# Financial Impacts to Muni service

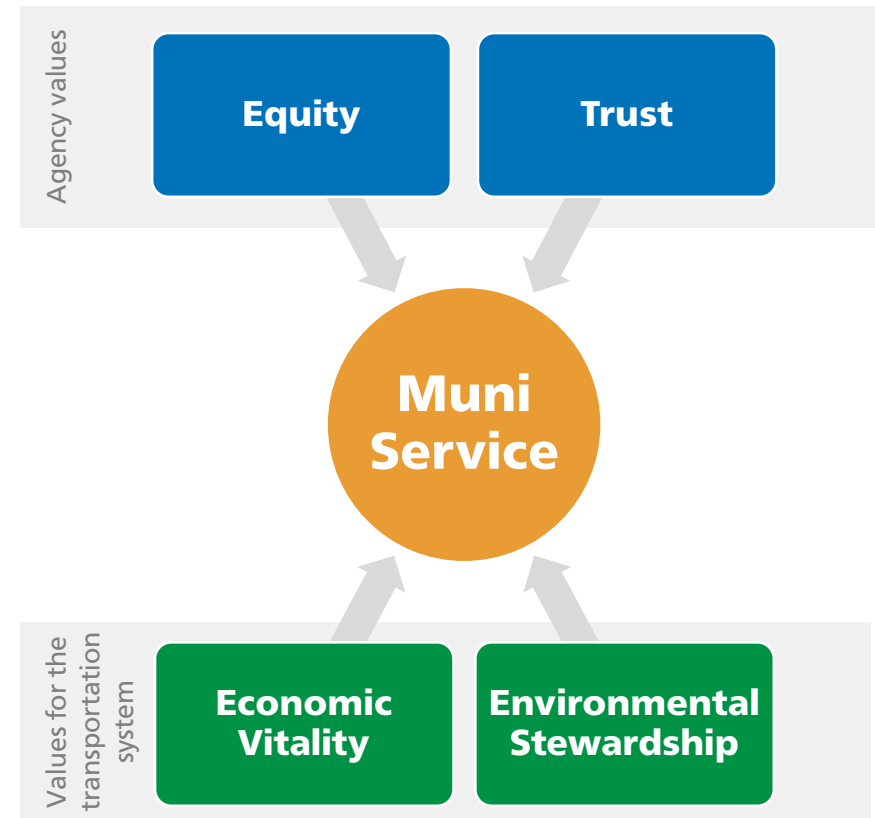
- Shift Muni service planning to “survival” scenario maintains current service levels
- Continue operator hiring to match attrition (250-300 people per year)
- Reduce crowding with revenue-neutral service changes that shift service from less crowded lines
- Continue prioritizing positions for maintenance and service quality to attract new riders
- Provide data publicly and increase transparency in decision-making at [SFMTA.com/MuniData](https://www.sfmta.com/MuniData)





# Muni Service Decision-Making Criteria

- Neighborhoods identified by the Muni Service Equity Strategy
- Ridership demand (crowding) and frequency
- Minimum policy frequencies
- Access for people with disabilities and seniors
- Support economic recovery



***Muni service criteria  
based on agency values***

# Weekday – Most Crowded Routes

*% of trips with crowding*

		AM Peak		Mid-Day				School		PM Peak			Evening		
		7	8	9	10	11	13	14	15	16	17	18	19	20	21
1-California	April 2023	16%	14%						5%	13%	21%				
	May 2023	14%	15%	7%						14%	20%	6%			
5-Fulton	April 2023		9%												
	May 2023		9%	1%	0%	0%									
14R-Mission Rapid	April 2023	10%								10%					
	May 2023	5%							6%	11%					
18-46th Avenue	April 2023								12%	0%	0%	0%	0%	0%	0%
	May 2023								11%						
19-Polk	April 2023								6%						
22-Fillmore	April 2023	5%							7%	8%					
	May 2023								5%	8%					
24-Divisadero	April 2023	6%							19%						
	May 2023	6%							22%						
28-19th Avenue	April 2023	7%	7%				6%	12%	27%	7%					
	May 2023	10%	7%					14%	28%	6%					
29-Sunset	April 2023	5%					5%	13%	17%	5%					
	May 2023	5%						13%	21%	7%					
30-Stockton	April 2023		6%						10%	6%					
	May 2023		5%						9%	6%					
38R-Geary Rapid	April 2023	15%	7%						6%	6%	9%				
	May 2023	9%	10%							6%	10%				
44-O'Shaughnessy	April 2023	20%	10%	8%	0%	0%		5%	21%	17%					
	May 2023	21%							21%	19%					
45-Union/Stockton	April 2023		9%							10%	6%	0%	0%	0%	
	May 2023		9%							10%					
48-Quintara/24th Street	April 2023	8%	8%					9%	16%	10%					
	May 2023		10%					5%	13%	8%	1%	0%	0%	0%	0%
49-Van Ness/Mission	April 2023	13%							6%	8%					
	May 2023	13%							6%	11%	1%	0%	0%	0%	0%

Top routes with over 5% of trips crowded in a single hour.

Crowded Trip = at least 10% of stops had load that was at or over the crowding capacity


# Publicly-available Dashboards

The public can follow along on service evaluation dashboards related to crowding, on-time performance, ridership at [SFMTA.com/MuniData](https://www.sfmta.com/MuniData)


## Muni Data

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Muni service evaluation dashboards.




**Average daily Muni boardings by route and month**  
Includes data pre-pandemic to present




**Muni system recovery percentage by month**  
Includes data April 2020 to present




**Crowding**  
Percent of Muni trips crowded by route and month



**Service delivery and ridership recovery**



**Subway performance data**  
Metrics used to inform day-to-day Metro service



**Strategic planning metrics**  
Muni service quality



# Summer Muni Service Changes

- Addressing crowding on most non-school crowded corridors
  - 1 California
  - 28 19th Avenue
  - 38R Geary Rapid
  - 44 O'Shaughnessy
- Supporting economic recovery
  - 1X California Express will start earlier with more morning trips
  - F Market & Wharves will have a bus overlay summer weekend afternoons



# Fall Muni Service Changes

- Addressing school crowding
  - Add 28R 19<sup>th</sup> Avenue Rapid (to Daly City BART, not Balboa Park Station)
  - Add/remove buses to select routes (analysis underway)
- Increasing access and regional connectivity
  - Extend 31 Balboa on 5th Street to Caltrain



# Semi-annual Evaluation

- As service changes are implemented, staff reviews data and community feedback
- New opportunities for improvements will be identified and documented based on existing service delivery metrics (on-time performance, crowding, etc.)
- Adjustments prioritized by Muni Service Equity Strategy
- Changes implemented 2-3 times per year informed by staffing and budget considerations





# Recommended Next Steps

- Continue to invest in reliability and travel time improvements throughout the network
- Remainder of 2022 Service Plan that no longer aligns with current resource constraints put on hold
- Provide SFMTA Board quarterly updates that respond to changing funding conditions



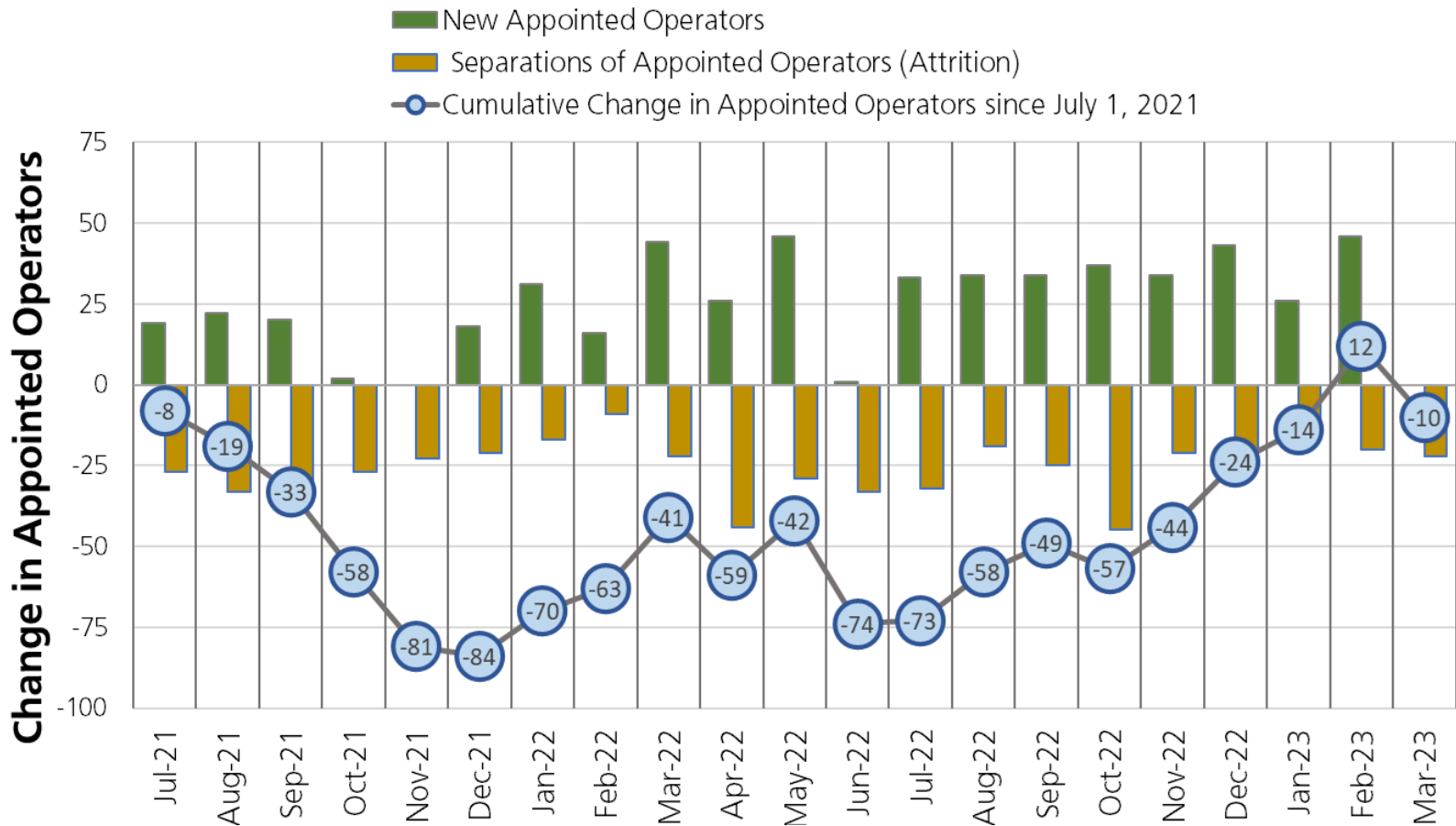




**Thank you!**

# Appointed Operators – New vs. Attrition

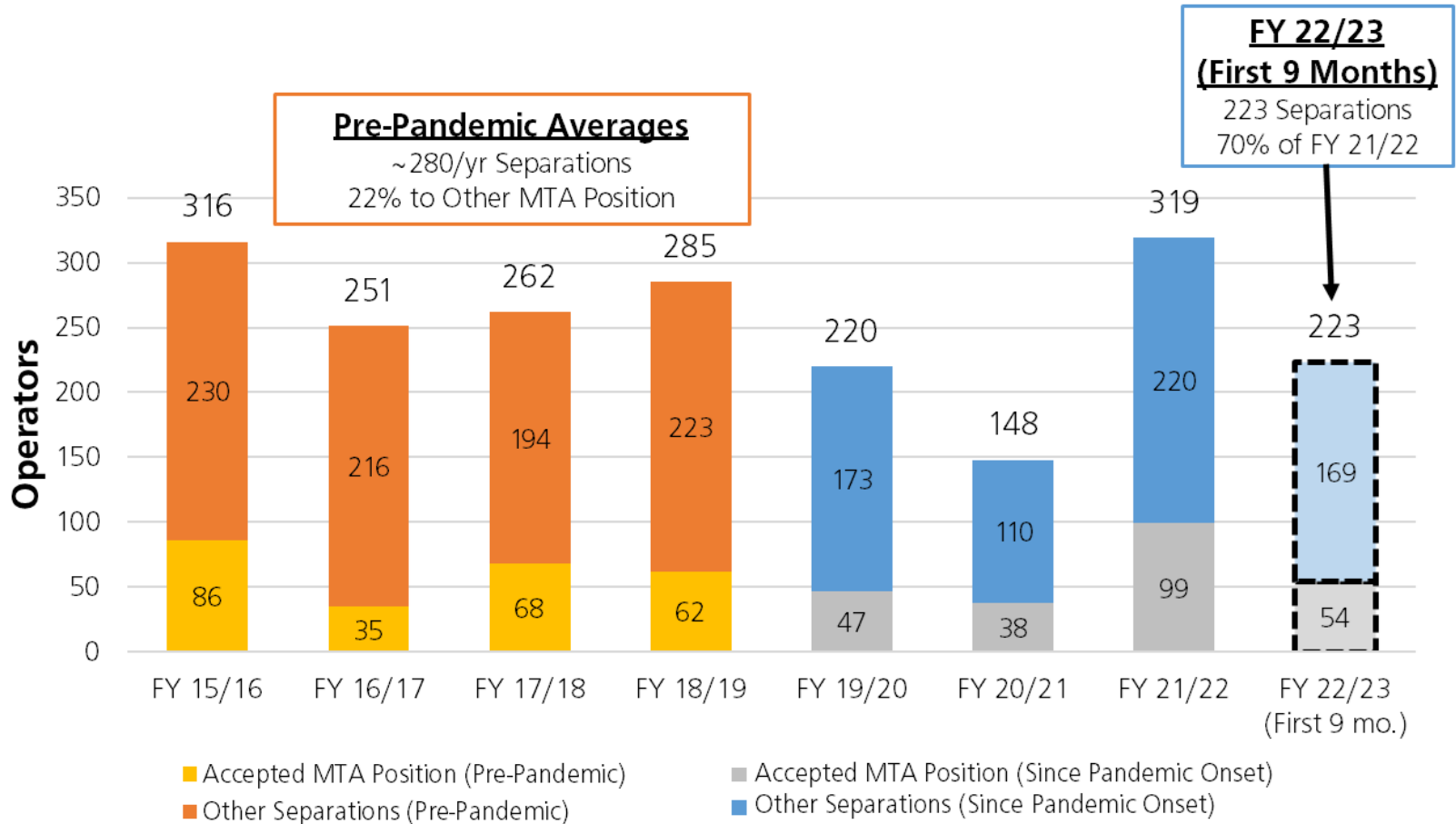
(July 2021 – March 2023)



- High attrition and small operator classes led to decline in operators in FY22
- Larger class sizes continuing to help increase operator availability in FY23



# Operator Attrition Trends



- FY22 operator attrition was significantly higher than previous 2 years
- Q1-Q3 FY23 is on pace with Q1-Q3 FY22 (Note: Q4 had highest attrition in FY22)