San Francisco Municipal Transportation Agency

2023 Community and Rider Data & Insights

SFMTA Board of Directors
May 2, 2023

In February 2023, the SFMTA Board discussed how to strengthen trust and build community connections.

Two key elements to achieve that included: demonstrating *empathy* and *being transparent*.

Practicing empathy requires the agency to *actively listen* and *understand itself*, and how it is perceived.

We will be **transparent about these findings**, demonstrate our capacity to respond and be reliable partners.

SFMTA 2022
Budget Outreach

SFMTA 2022
Rider Survey

SFMTA 2023
Community Survey

CCSF 2023
City Survey

Transit App
Happiness Benchmark

At today's MTA Board of Directors meeting, we will the data from various touchpoints with the community over the past 12-months, and related insights.

This journey begins with the outreach done on the SFMTA's budget approximately one-year ago. We will also consider what we have heard from:

- The SFMTA Rider Survey, from this past summer.
- The SFMTA Community Survey completed at the beginning of 2023.
- Real-Time data from our partners at Transit App, and
- Data from the City and County of San Francisco's 2023 City Survey.

This information is meant to provide the Board with *real-time and longitudinal feedback*, as it considers priorities and next steps.

Does the agency's policy priorities match the expectation we are hearing through these sources?

Insights & Synthesis
From all our sources, what do we think?

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

- *Seek opinions* of San Franciscans;

- *Stay in touch* with their issues, and

- *Balance the results* transparently.

In synthesizing what we have heard via various surveys and data here are some insights:

- **The view of the SFMTA continues to remain steady**, considering concerns about government. But we want to do even better.

- **People are taking fewer trips**. While our riders have returned the number transit trips they take are reduced. We've adjusted our ridership projections accordingly.

- **Overall, across all surveys 60+% view our transit service positively**; riders rate us higher than non-riders across the board.

- San Franciscans see our service and work as **a vital part of the community**, our Transportation 2050 focus areas continue to address key issues, service needs and projects.

Positive & Reinforce

- Being A Vital Part of the Community
- Being Accessible
- Steady and Improving Service Quality
- Positive Agency Performance

Things to Work On

- Safety
- Responsiveness
- Being more efficient
- Being more innovative

To continue being a vital part of the community, you've told us your **priorities** are:

Investing Equitably

Fast and Convenient Transit

More Repairs and Maintenance

Improving Safety and Access

Muni Ridership Projection Updated

Ridership continues to show a year over year recovery; however, updated projections show a slowing of the recovery to less than originally projected for the FY 2023 budget.

Legend:
- FY 2022 Actual
- FY 2023 Actual
- Baseline (FY 2019)
- Projection Original
- Projection Updated
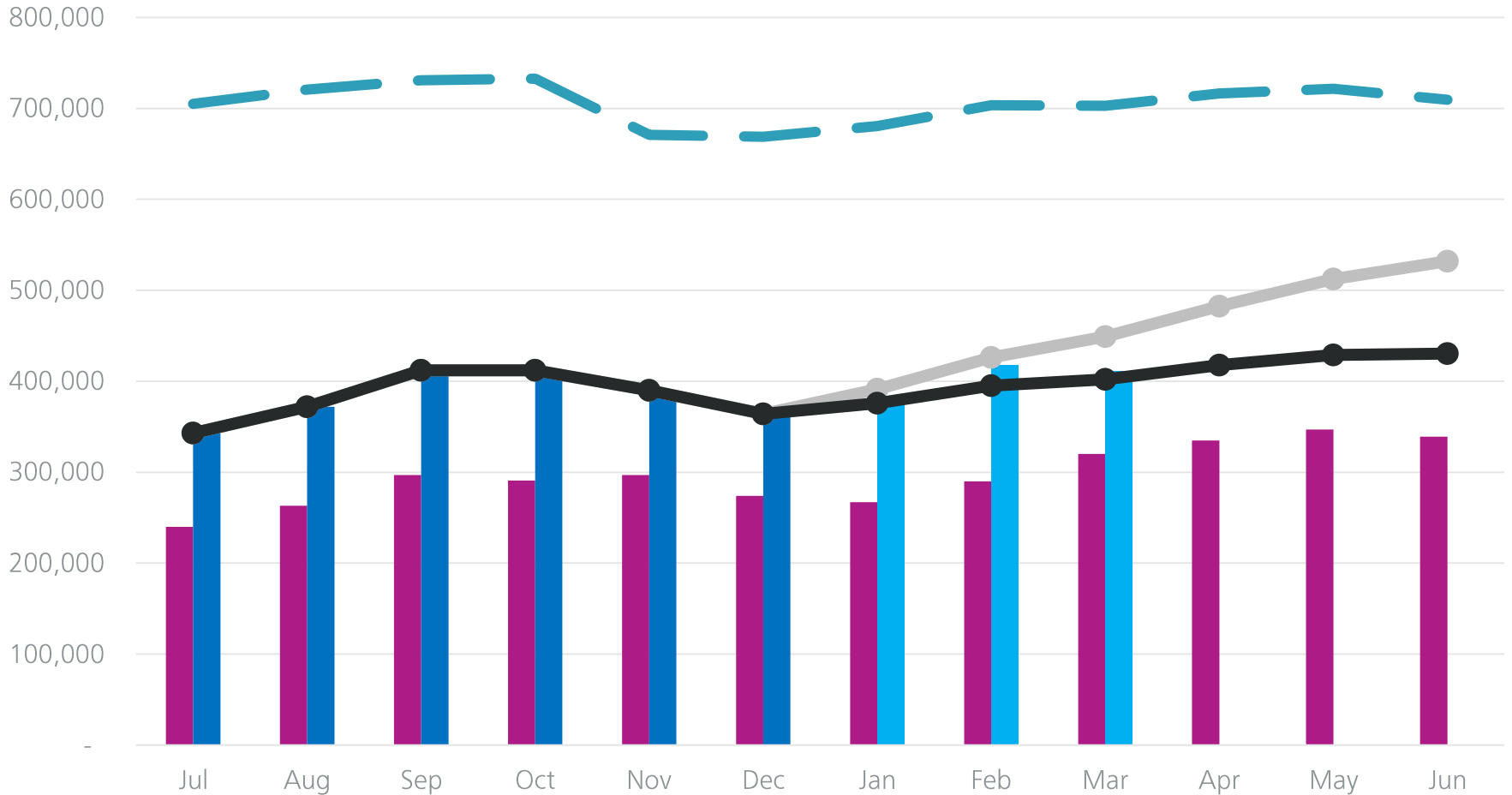
2022 Budget Outreach

Open Survey – 1,295 respondents
Synthesis of town hall and open comments
Source: 2022 SFMTA Budget Appendix

SFMTA 2022 Budget Outreach

» Transit Speed, Reliability and Access

» Personal Safety on Transit and on Streets

» Equity in delivery of service

» State of Good Repair infrastructure investments

» Quick and convenient access throughout San

» Francisco

» Avoid fare increases and expand discount programs

» Reduce traffic congestion through investment in transit

» Improving the customer experience on transit including improved Next Bus service and cleaner shelters

In early 2022, the SFMTA conducted outreach for the development of the priorities for the 2-year budget ending in June 2025. Various themes and insights were generated and resulted in the development of budgetary priorities.

The outreach included:

• An open survey asking first and second priorities

• An open survey question asking for prioritization of various initiatives

• Two open town halls

• Synthesis and analysis of all open comments during all elements of the outreach process conducted in February and March 2022.

2022 SFMTA Budget Survey

Possible SFMTA Goals:
Which Would You Prioritize? First Priority

- **Improving the speed, frequency, and reliability of Muni buses and trains**
- **Improving personal safety for Muni riders**
- **Reducing traffic congestion and eliminating bottlenecks by improving public transit**
- **Improving transportation in neighborhoods with high percentages of households with low incomes and people of color**
- **Improving pedestrian safety**
- **Repairing and maintaining buses, trains, and transit infrastructure**
- **Improving bike safety**
- **Don't know/not sure**

Pie chart values: 40.90%, 14.30%, 13.60%, 9.90%, 8.00%, 5.80%, 5.50%, 2.00%

*1,295 Respondents Final Results April 5, 2022

2022 SFMTA Budget Survey

Possible SFMTA Goals:
Which Would You Prioritize? Second Priority
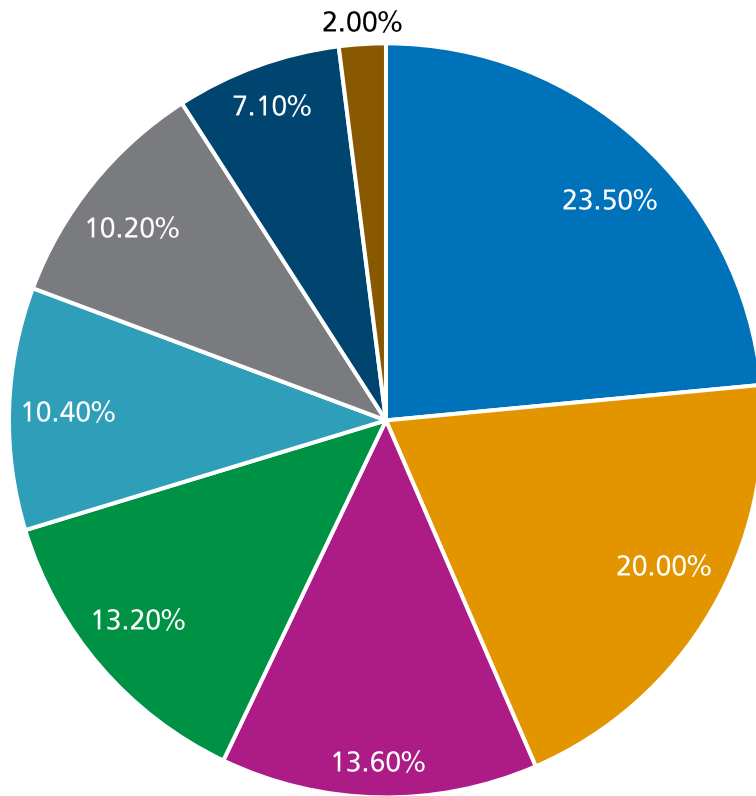
- ■ Improving the speed, frequency, and reliability of Muni buses and trains
- ■ Improving personal safety for Muni riders
- ■ Improving transportation in neighborhoods with high percentages of households with low incomes and people of color
- ■ Reducing traffic congestion and eliminating bottlenecks by improving public transit
- ■ Repairing and maintaining buses, trains, and transit infrastructure
- ■ Improving pedestrian safety
- ■ Improving bike safety
- ■ Don't know/not sure

*1,295 Respondents Final Results April 5, 2022

2022 SFMTA Budget Survey - Prioritizing Individual Initiatives

| Initiative	EXTREMELY IMPORTANT	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT TOO IMPORTANT	DON'T KNOW/ NOT SURE
Improving personal safety for riders on Muni buses/trains and at stops/stations	51.80%	29.20%	14.30%		
Making street safety improvements for people bicycling, like protected bikeways	33.20%	22.00%	23.20%	19.00%	
Making street improvements for walking	39.10%	27.90%	21.20%	10.60%	
Rebuilding San Francisco's aging rail network	39.30%	34.30%	19.30%	4.90%	
Expanding reduced fares for youth, seniors and low-income residents	41.80%	24.90%	16.50%	15.10%	
Improving access to public transit for people who are disabled	39.10%	34.00%	19.70%	5.60%	
Improving the flow of traffic	38.10%	29.40%	17.80%	12.90%	
Reducing delays to make Muni more reliable	62.60%	29.00%	7.10%		
Ensuring Muni service is inclusive and accessible to all	49.60%	30.30%	13.90%	5.00%	
Increasing and improving Muni service for the communities most dependent on transit	55.20%	29.10%	11.70%		
Repairing and maintaining Muni equipment and facilities to ensure vehicles' safety, frequency, and reliability	52.80%	35.40%	9.80%		
Providing quick, convenient transit access to all parts of San Francisco	62.20%	27.00%	8.00%		

■ EXTREMELY IMPORTANT   ■ VERY IMPORTANT   ■ SOMEWHAT IMPORTANT   ■ NOT TOO IMPORTANT   ■ DON'T KNOW/ NOT SURE

2022 SFMTA Budget Survey - Categorized Comments

917 additional responses collected from listening sessions, open responses, emails and phone calls. Comments were categorized by MTA staff

Emphasis on Safety for ALL Modes

Transit Service: More Frequent, More Lines

Don't Raise Fares, Add Discount Programs

Transit Only Lanes to Fix Congestion

Cleaner Bus Shelters and Stations

Deliver on State of Good Repair
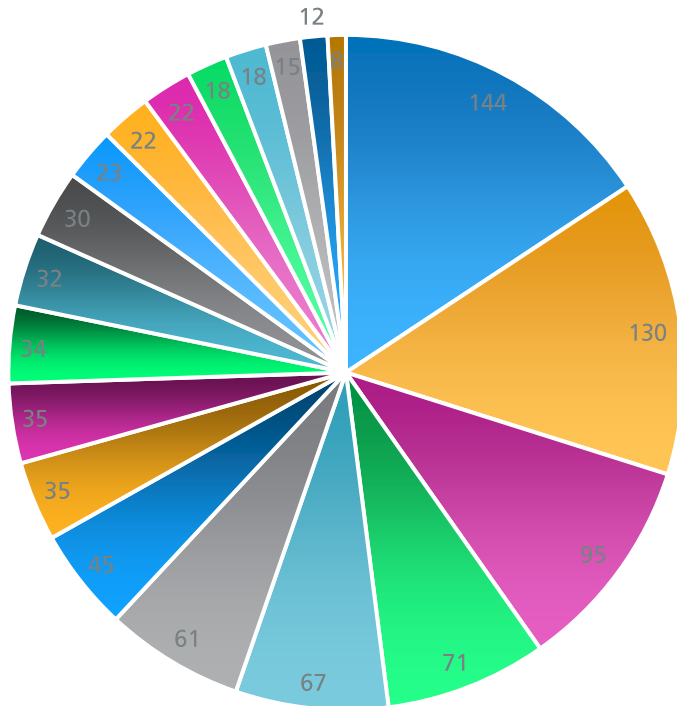
Legend:
- Support for Increased Service Lines and Frequency
- Prioritize Safety on Streets and Muni
- Support 100% Pre-Pandemic Service Restoration
- Other
- Concerns About Rising Traffic
- Support for More Transit Only Lanes
- Make the System More Accessible
- Make the SFMTA More Equitable
- Support Existing or Expanded Fare Discount Programs
- Improve and Clean the Bus Shelters and Stations
- Concerns About Slow Streets
- Support for Slow Streets
- Support no Fare Increase (No Indexing)
- Make Muni Free for All
- Improve NextBus
- Improve the Fare Enforcement Program
- Give Less Free Parking or Extend Meter Hours
- Deliver More Capital Improvements
- Improve Outreach to the Communities
- Support Ballot Initiative(s) to Fund the SFMTA

Pie chart values: 144, 130, 95, 71, 67, 61, 45, 35, 35, 34, 32, 30, 23, 22, 22, 18, 15, 12

2023 SFMTA Ridership Survey
Multi-Language Voter Survey - 533 respondents

RIDERSHIP SURVEY 2022

Conducted for the San Francisco Municipal Transportation Agency

KEY FINDINGS

August to October 2022

Prepared by
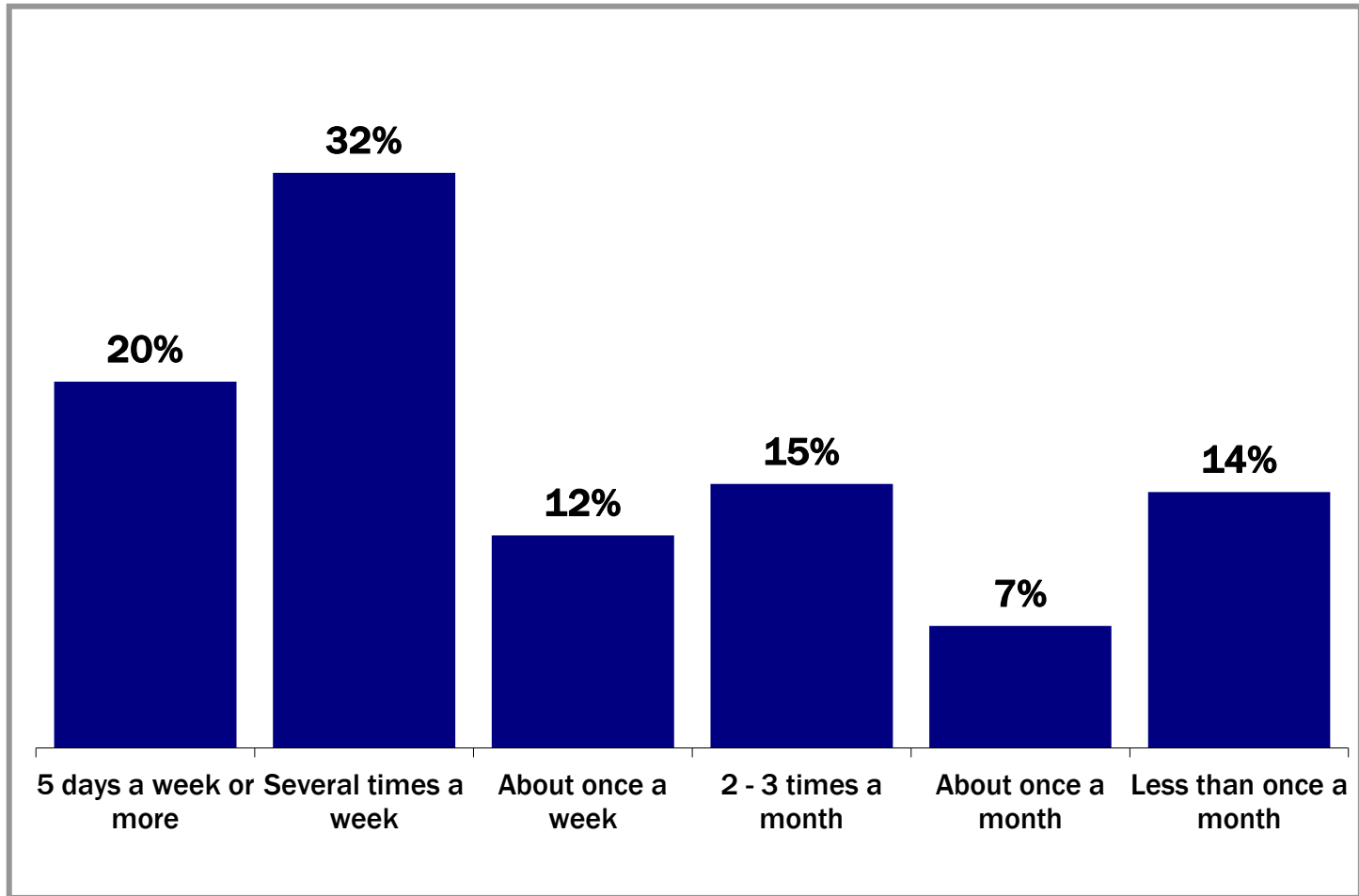COREY, CANAPARY & GALANIS RESEARCH
San Francisco, California

SURVEY DETAILS

TECHNIQUE	Telephone interviewing and Self-administered online survey
FIELD DATES	Field work conducted in August through October 2022
INTERVIEWS	533 total completed interviews
	297 (56%) telephone, 236 (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)	+/- 4.2% for total sample (n=533)
NOTES	Responses are rounded to the nearest whole percentage. On some questions, the percentages may not add up 100% because of statistical rounding.

FREQUENCY OF RIDING MUNI

How often do you ride Muni?

Bar chart with the following values:
- 5 days a week or more: 20%
- Several times a week: 32%
- About once a week: 12%
- 2 - 3 times a month: 15%
- About once a month: 7%
- Less than once a month: 14%

Base: 2022 All Riders (n=456)
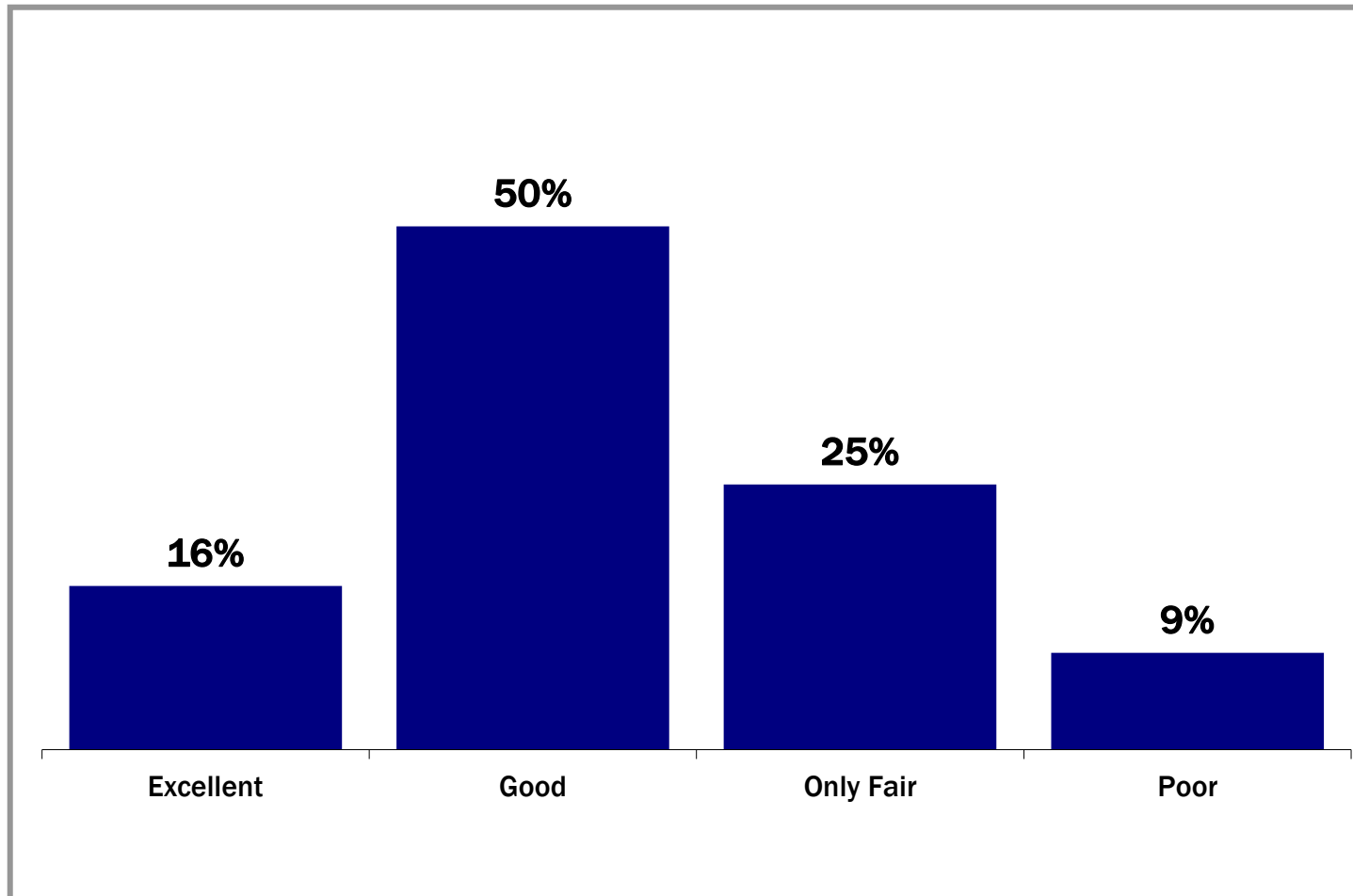
SATISFACTION RATINGS

OVERALL RATING OF MUNI SERVICE (2022)

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

Base: 2022 All Riders (n=456)

OVERALL RATING OF MUNI SERVICE – THREE YEAR COMPARISON

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

Legend: ■ 2022 ■ 2021 ■ 2019

	Excellent	Good	Only Fair	Poor
2022	16%	50%	25%	9%
2021	11%	46%	32%	12%
2019	12%	47%	33%	8%

Base: 2022 All Riders (n=456)
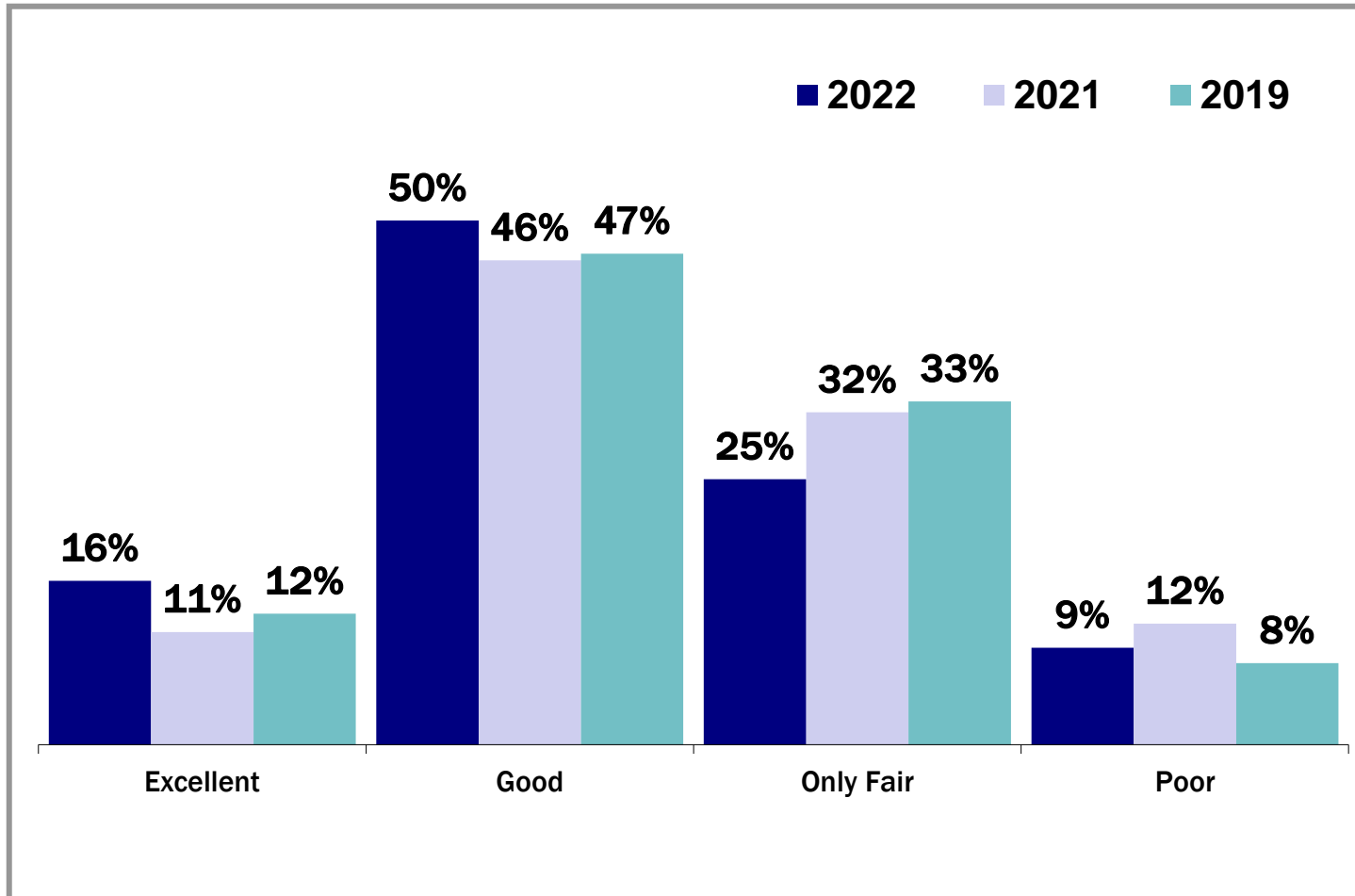
OVERALL RATING OF MUNI SERVICE - TRENDING

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

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

Year	Rating
2001	48%
2002	57%
2003	68%
2004	64%
2005	65%
2006	53%
2007	55%
2010	52%
2011	57%
2012	62%
2014	64%
2015	66%
2016	70%
2017	70%
2018	63%
2019	59%
2021	57%
2022	66%
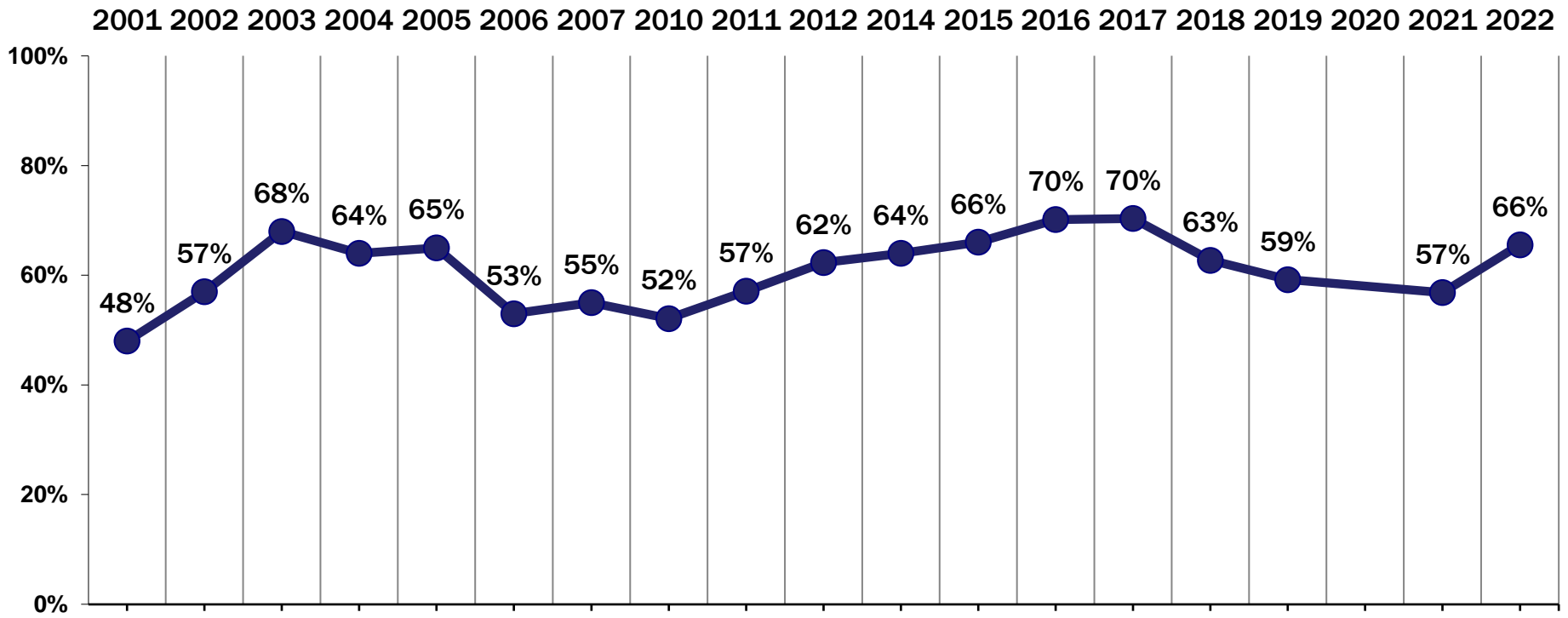
Important Note: Between 2001-2004, a 5 point scale was used: excellent, good, fair, poor and very poor. Since 2005, a four point scale has been used: excellent, good, fair, and poor. Survey was not conducted in 2020

Base: 2022 All Riders (n=456)

OVERALL RATING OF MUNI SERVICE – GEOGRAPHIC DISTRIBUTION

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

Overall
66% Excellent/Good

San Francisco Bay

Zone 2
69% Excellent/Good

Zone 3
61% Excelllent/Good

Zone 1
66% Excellent/Good

Zone 4
65% Excellent/Good

Zone 5
68% Excellent/Good
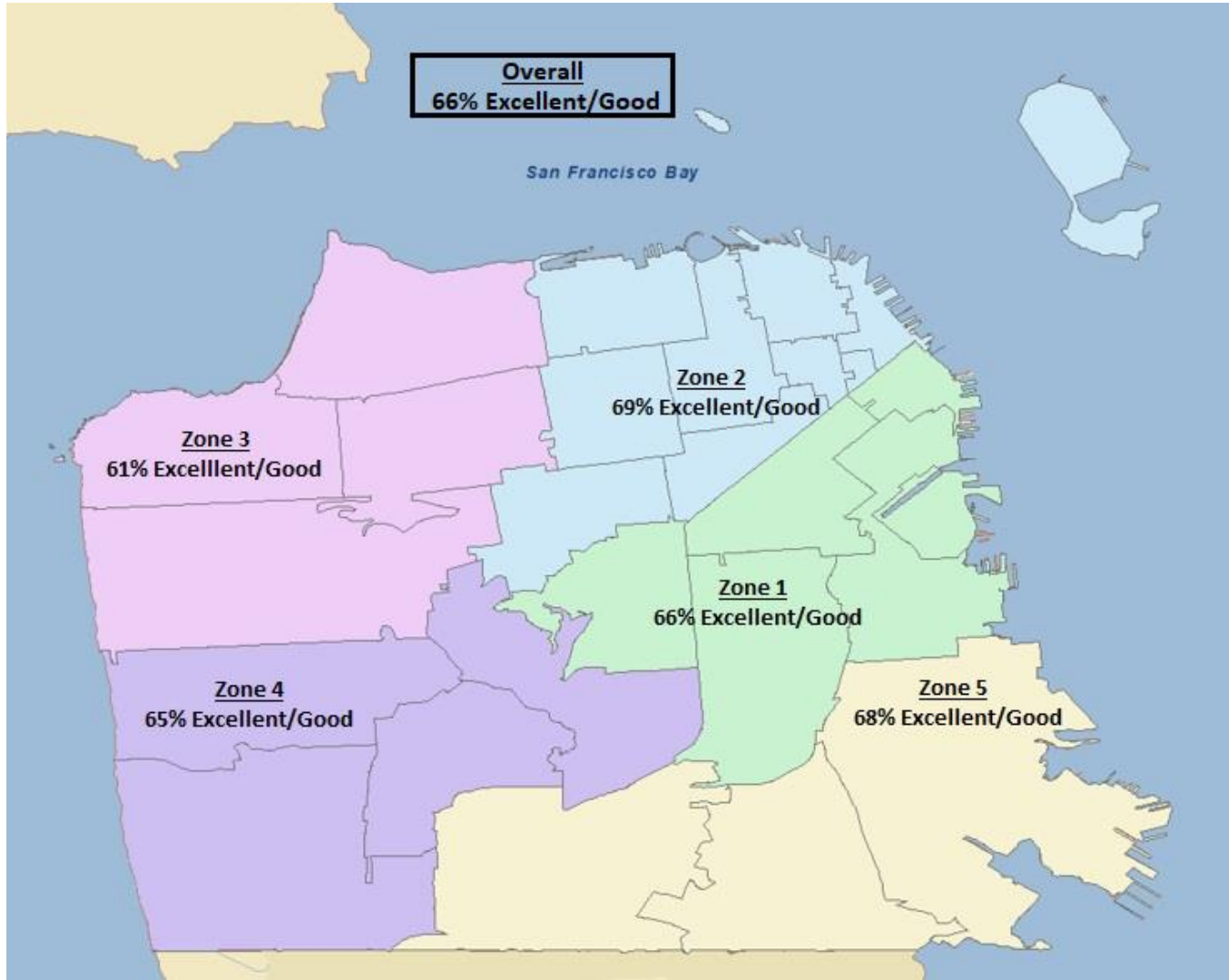
RATING OF SPECIFIC MUNI ATTRIBUTES

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 excellent or good)		
	2022	2021	2019
Accessibility for persons with disabilities…………………	**81%**	79%	71%
Operator (driver) helpfulness……………………………….	**73%**	70%	66%
Trips take a reasonable amount of time………………….	**65%**	57%	61%
Cleaning Muni Vehicles^……………………………………….	**57%**	60%	49%
Frequency of service…………………………………………….	**51%**	45%	50%
Communication with the public^………………………….	**51%**	50%	48%
Accurate arrival predictions ………………………………….	**49%**	45%	50%
Reliability / On-time performance………………………….	**47%**	42%	44%
Safety and security from crime while onboard or waiting for Muni…………..	**42%**	38%	-
Managing crowding on Muni vehicles…………………….	**37%**	38%	31%

RATING OF SPECIFIC MUNI ATTRIBUTES

QUADRANT CHART

Low Rating/High Impact (Opportunities for Improvement)

High Rating/High Impact (Doing Well)

Providing frequent service

Trips taking a reasonable amount of time

Providing reliability (on-time performance)

DERIVED IMPORTANCE

More Important

Communicating with the public

Safety and security from crime while onboard or waiting for Muni

Vehicle Cleanliness

PERFORMANCE (4 point scale: 1=poor to 4=excellent)

Helpful drivers/operators

Managing crowding

Providing accurate arrival predictions

Providing access for people with disabilities

Less Importanat

Low Rating/Low Impact (Lower Priority)

Lower Rating

High Rating/Low Impact (Exceeding Expectations)
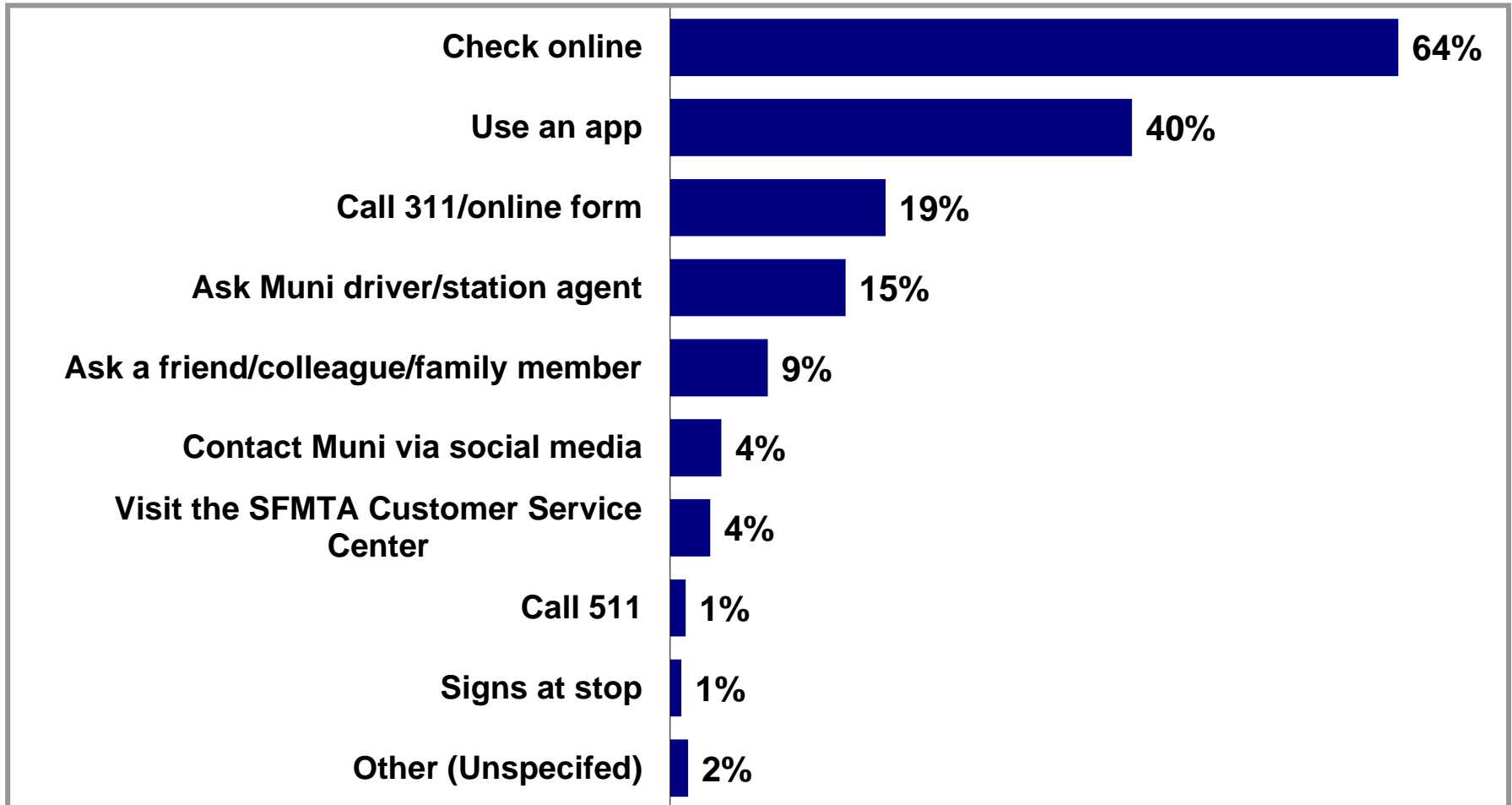
Higher Rating

Base: 2022 All Riders (n=456)

COMMUNICATION

MUNI INFORMATION SOURCES

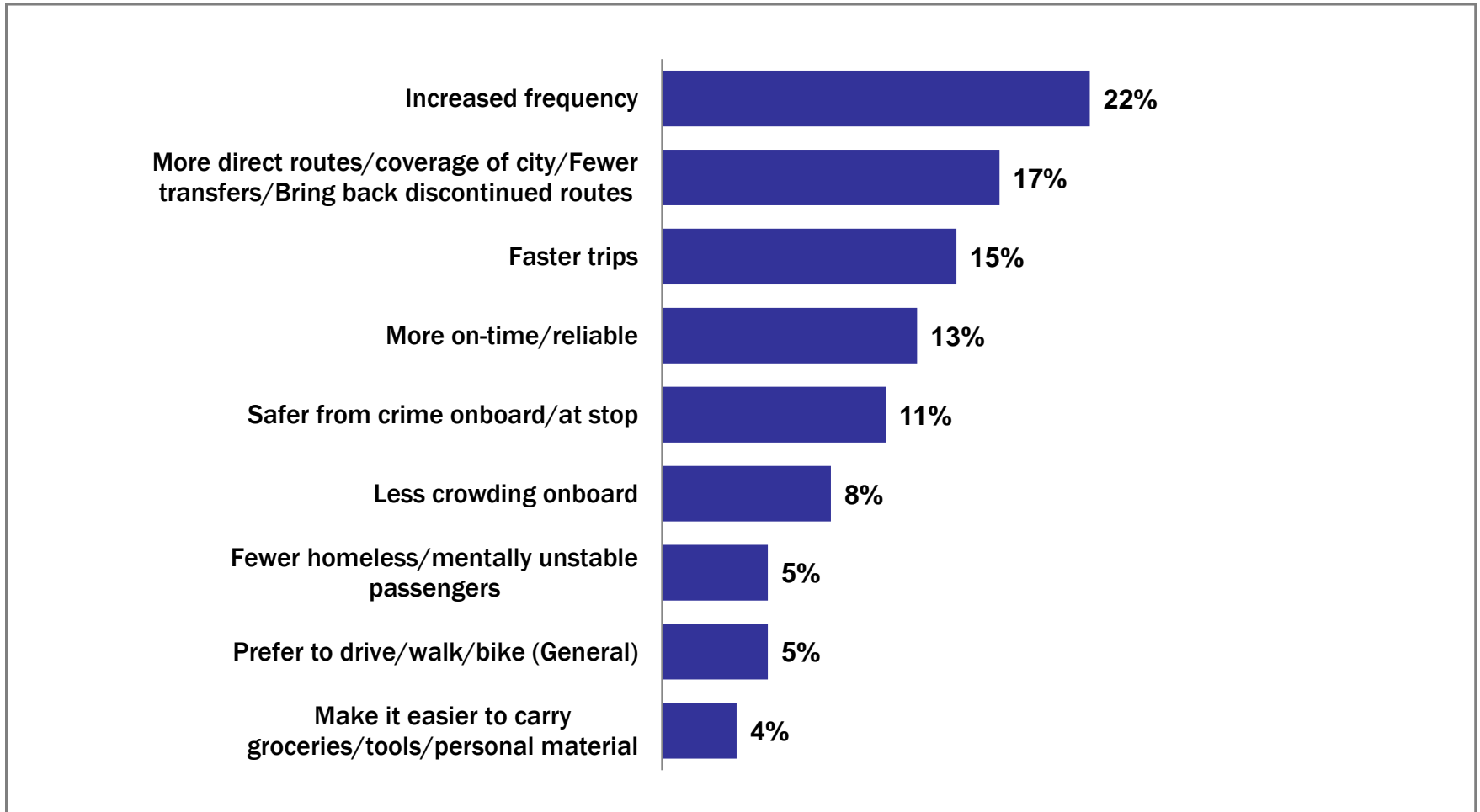**If you needed information about Muni, how would you obtain this information?**

(Open-Ended. Multiple Responses Accepted)

Source	Percentage
Check online	64%
Use an app	40%
Call 311/online form	19%
Ask Muni driver/station agent	15%
Ask a friend/colleague/family member	9%
Contact Muni via social media	4%
Visit the SFMTA Customer Service Center	4%
Call 511	1%
Signs at stop	1%
Other (Unspecifed)	2%

Base: 2022 Total (n=533)

NON-RIDERS

NON-RIDERS

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

Response	Percentage
Increased frequency	22%
More direct routes/coverage of city/Fewer transfers/Bring back discontinued routes	17%
Faster trips	15%
More on-time/reliable	13%
Safer from crime onboard/at stop	11%
Less crowding onboard	8%
Fewer homeless/mentally unstable passengers	5%
Prefer to drive/walk/bike (General)	5%
Make it easier to carry groceries/tools/personal material	4%

*Partial list, only responses 4% or greater overall are shown, see crosstabulated tables for complete list
Base – Have not ridden Muni in the past three years (N=77)

2023 SFMTA Community Survey
Multi-Language Voter Survey - 884 respondents

San Francisco
Municipal Transportation Agency
2023 Community Survey

Key Findings of a Study Conducted February 10-20, 2023

320-1070

Survey Methodology

Dates	February 10-20, 2023
Survey Type	Dual-mode Voter Survey
Research Population	San Francisco Voters
Total Interviews	884
Margin of Sampling Error	±3.5% at the 95% Confidence Level
Contact Methods	Telephone Calls Email Invitations Text Invitations
Data Collection Modes	Telephone Interviews Online Interviews
Languages	English, Spanish & Chinese

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

FM3
RESEARCH

Perceptions and Use of Muni

Three in five approve of the SFMTA and Muni's performance, regardless of which name is used.

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

Organization	Strng. Appr.	Smwt. Appr.	Don't Know	Smwt. Disappr.	Strng. Disappr.	Total Appr.	Total Disappr.
The San Francisco Municipal Transportation Agency, also known as SFMTA	16%	46%	5%	18%	14%	63%	32%
The San Francisco Municipal Transportation Agency, also known as Muni	20%	42%		16%	17%	62%	34%
BART	14%	44%	15%	17%	10%	58%	27%
Caltrain	17%	29%	41%	8%	5%	46%	13%
^San Francisco city government	5%	30%	6%	29%	30%	35%	59%

71% of riders approve of the job being done by SFMTA compared to 48% of non-riders.

Approval ratings for Muni have declined slightly, while those for SFMTA have remained consistent.

Total Approve

Person/Organization	2021	2023	Difference
The San Francisco Municipal Transportation Agency, also known as SFMTA	64%	63%	**-1%**
BART	60%	58%	**-2%**
Caltrain	49%	46%	**-3%**
The San Francisco Municipal Transportation Agency, also known as Muni	69%	62%	**-7%**
^San Francisco city government	59%	35%	**-24%**

71% of riders approve of the job being done by SFMTA compared to 48% of non-riders.

FM3 RESEARCH

Two-thirds of respondents ride Muni at least 2-3 times per week.

Do you regularly, 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.

Mode	Percentage
Ride Muni	67%
Drive alone	55%
Use a ride hail service like Uber or Lyft	40%
Ride BART	34%
Ride a bicycle	25%
Carpool	21%
Ride Caltrain	9%

Q15.

FM3 RESEARCH
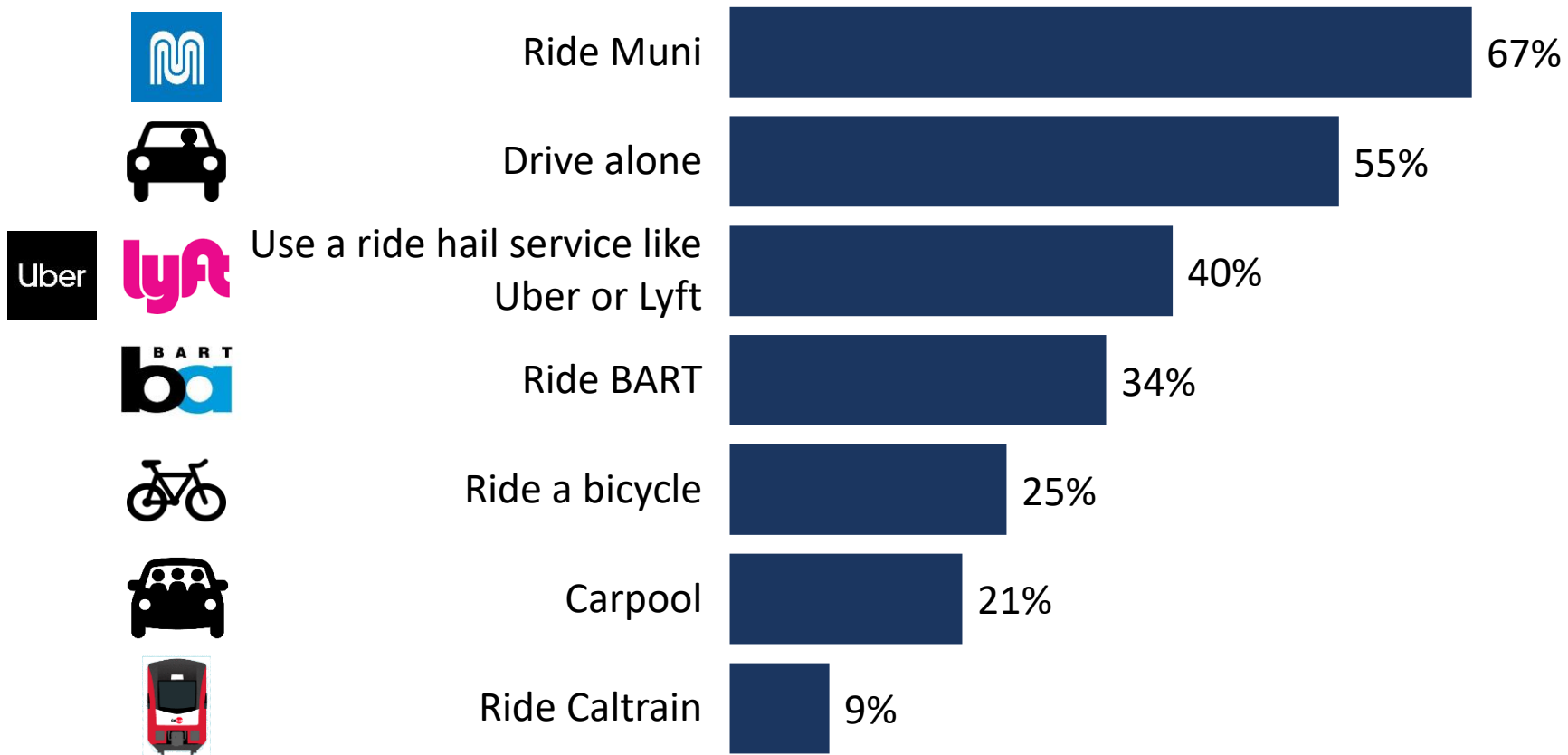
Respondents describe SFMTA as both unreliable and slow and as useful and convenient at similar rates.

If you had to describe the SFMTA or Muni in 1 or 2 of your own words, how would you describe it?
(Open-ended; Asked of Half Sample Only, n=442)

Description	Percentage
Unreliable/badly run/inconvenient/late/inconsistent/slow	22%
Useful/convenient/reliable/effective/on time/available	18%
Terrible service/poorly managed/unorganized/needs improvement	16%
General positive (okay, good, etc.)	14%
Dirty/a mess/gross	7%
Unsafe/dangerous/risky/not trustworthy	6%
Expensive/over budgeted	6%
General negative (bad, terrible, etc.)	3%
Necessary/important	3%
Underfunded/resourced	3%
Dysfunctional/crime ridden/lack of enforcement	2%
Great service/serviceable/more service	2%
Good public transit/transportation/commute	2%
Public transportation/city transportation	2%
Too many free loaders/fair skippers/free riders/need to collect fares	2%
Comprehensive/broad/extensive	1%

Q2. Split Sample

Three in five say Muni service is at least "good," but few say it is "excellent."

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

2021	2023

2021

Excellent — 9%
Good — 53%

Excellent/ Good 62%

Not so good — 23%
Poor — 9%

Not So Good/ Poor 33%

Don't know — 6%

2023

Excellent — 9%
Good — 51%

Excellent/ Good 60%

Not so good — 24%
Poor — 13%

Not So Good/ Poor 37%

Don't know — 3%

Excellent/Good Rating:
66% of Muni riders
48% of Non-riders

Q3.
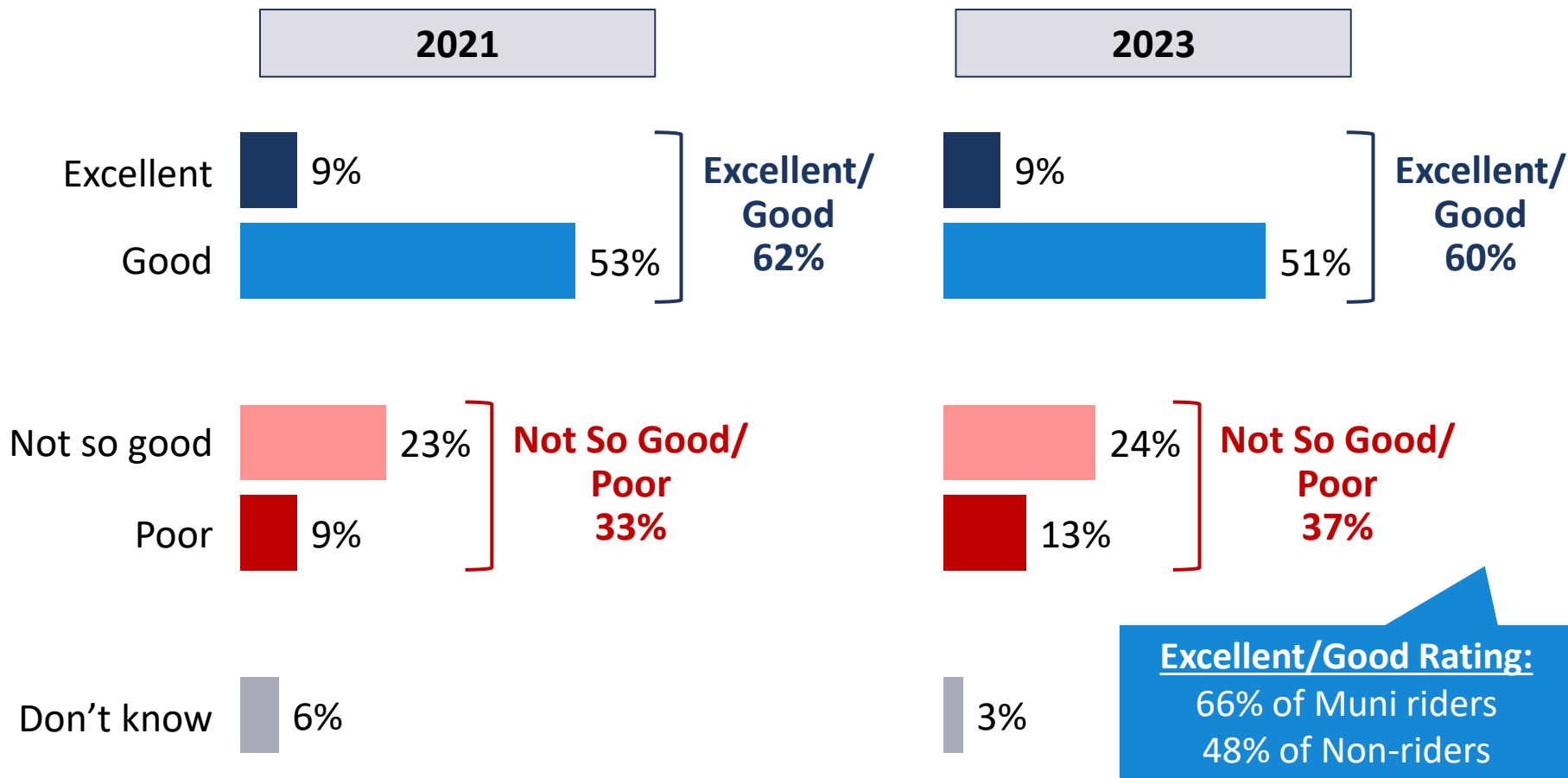
SFMTA is seen as "a vital part of the community," "good for the environment" and "easy to use."

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

■ Total Well   ■ Total Not Well

Difference

	Total Well	Total Not Well	Difference
A vital part of the community	88%	11%	**+77%**
Good for the environment	83%	11%	**+72%**
Easy to use	79%	20%	**+59%**
Easily accessible	73%	23%	**+50%**
Affordable	71%	25%	**+46%**
A good way to get where I am going	71%	28%	**+43%**
Equitable	62%	21%	**+41%**
Convenient	67%	31%	**+36%**
Slow way to travel	58%	38%	**+20%**
Inefficient	54%	38%	**+16%**
Crowded	54%	39%	**+15%**
Dirty	55%	41%	**+14%**

Q5. Split Sample
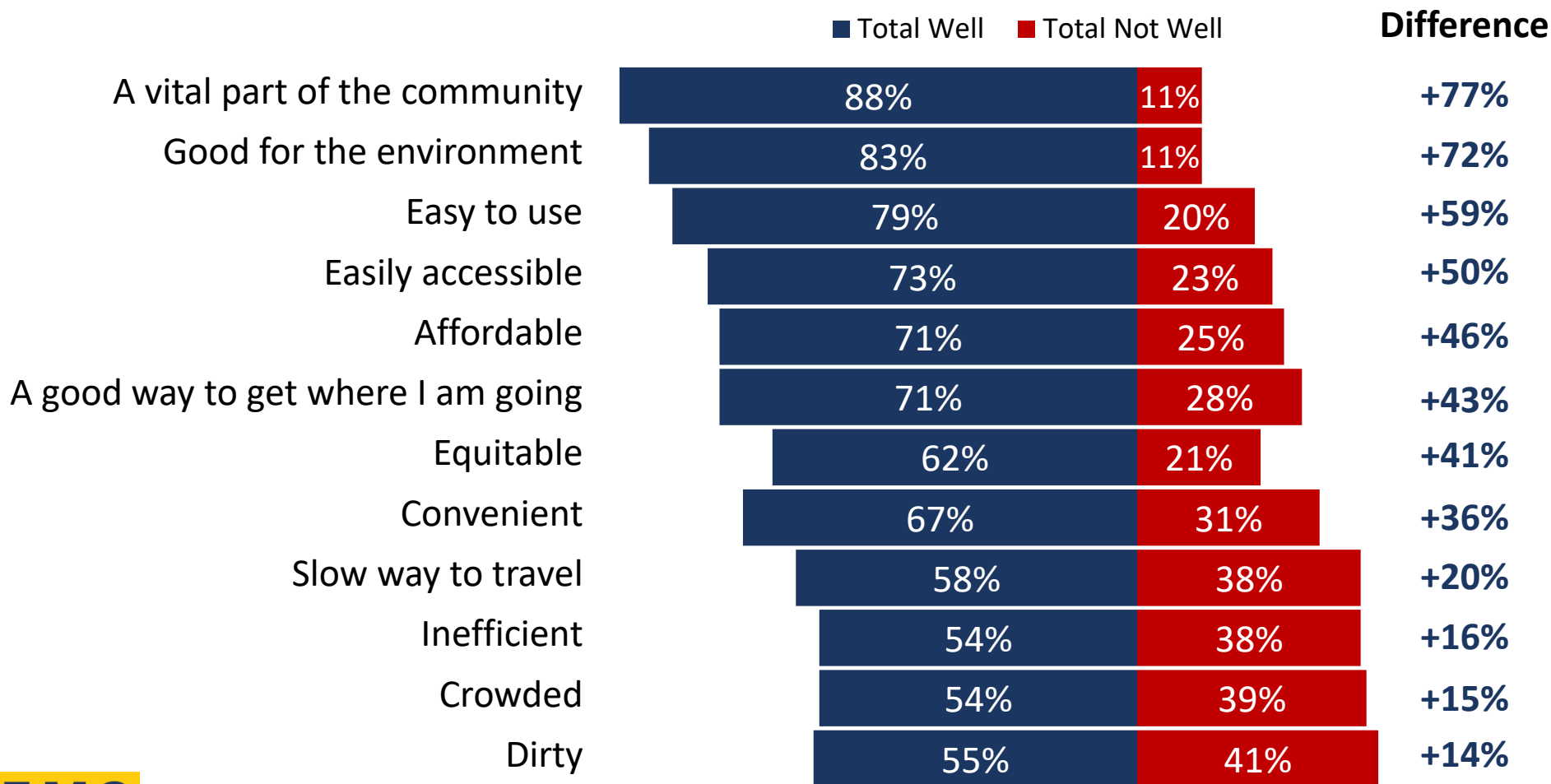
Respondents most often say that "safe from crime" and "innovative" do *not* describe SFMTA and Muni well.

	■ Total Well	■ Total Not Well	Difference
Reliable	55%	43%	+12%
Outdated	52%	40%	+12%
^Does a good job of serving the whole city	53%	42%	+11%
Trustworthy	51%	43%	+8%
Quick way to travel	51%	48%	+3%
Up-to-date technologically	42%	49%	-7%
Unsafe from crime	40%	53%	-13%
Responsive to community concerns	32%	47%	-15%
Well-managed	34%	50%	-16%
Uses taxpayer money efficiently	31%	48%	-17%
Safe from crime	37%	56%	-19%
Innovative	34%	57%	-23%

FM3 RESEARCH

Q5. Here is a series of words and phrases that someone might use to describe SFMTA and Muni. Please tell me if it describes SFMTA and Muni as an organization very well, somewhat well, not too well, or not at all well. ^Not Part of Split Sample

Perceptions of Muni management, responsiveness and trustworthiness have worsened.

Total Well

Word/Phrase	2021	2023	Difference
Inefficient	51%	54%	+3%
*Quick way to travel	48%	51%	+3%
Good for the environment	82%	83%	+1%
Outdated	51%	52%	+1%
Affordable	71%	71%	0%
Easy to use	83%	79%	-4%
A vital part of the community	92%	88%	-4%
Dirty	60%	55%	-5%
Safe from crime	42%	37%	-5%
Easily accessible	78%	73%	-5%
Innovative	40%	34%	-6%
Convenient	74%	67%	-7%
Reliable	62%	55%	-7%
Uses taxpayer money efficiently	38%	31%	-7%
^Does a good job of serving the whole city	63%	53%	-10%
Well-managed	44%	34%	-10%
Responsive to community concerns	42%	32%	-10%
Crowded	66%	54%	-12%
Trustworthy	63%	51%	-12%
Up-to-date technologically	55%	42%	-13%

FM3 RESEARCH

*Q5a-j, m-u & w. Here is a series of words and phrases that someone might use to describe SFMTA and Muni. Please tell me if it describes SFMTA and Muni as an organization very well, somewhat well, not too well, or not at all well. ^Not Part of Split Sample; *Wording was Slightly Different in Previous Survey*

Riders have more positive views than non-riders, particularly in terms of Muni as a good way to get where they are going.

Total Well

Word/Phrase	All Respondents	Non-Riders	Riders
A vital part of the community	**88%**	79%	93%
Good for the environment	**83%**	77%	87%
Easy to use	**79%**	67%	85%
Easily accessible	**73%**	65%	76%
Affordable	**71%**	69%	72%
A good way to get where I am going	**71%**	50%	83%
Convenient	**67%**	57%	71%
Equitable	**62%**	55%	66%
Slow way to travel	**58%**	64%	55%
Reliable	**55%**	48%	58%
Dirty	**55%**	64%	51%
Crowded	**54%**	42%	60%

*Q5. Here is a series of words and phrases that someone might use to describe SFMTA and Muni. Please tell me if it describes SFMTA and Muni as an organization very well, somewhat well, not too well, or not at all well. ^Not Part of Split Sample; *Wording was Slightly Different in Previous Survey*

FM3 RESEARCH

Muni riders are more positive about the job it does connecting the city and are more likely to say it is a quick way to travel.

Total Well

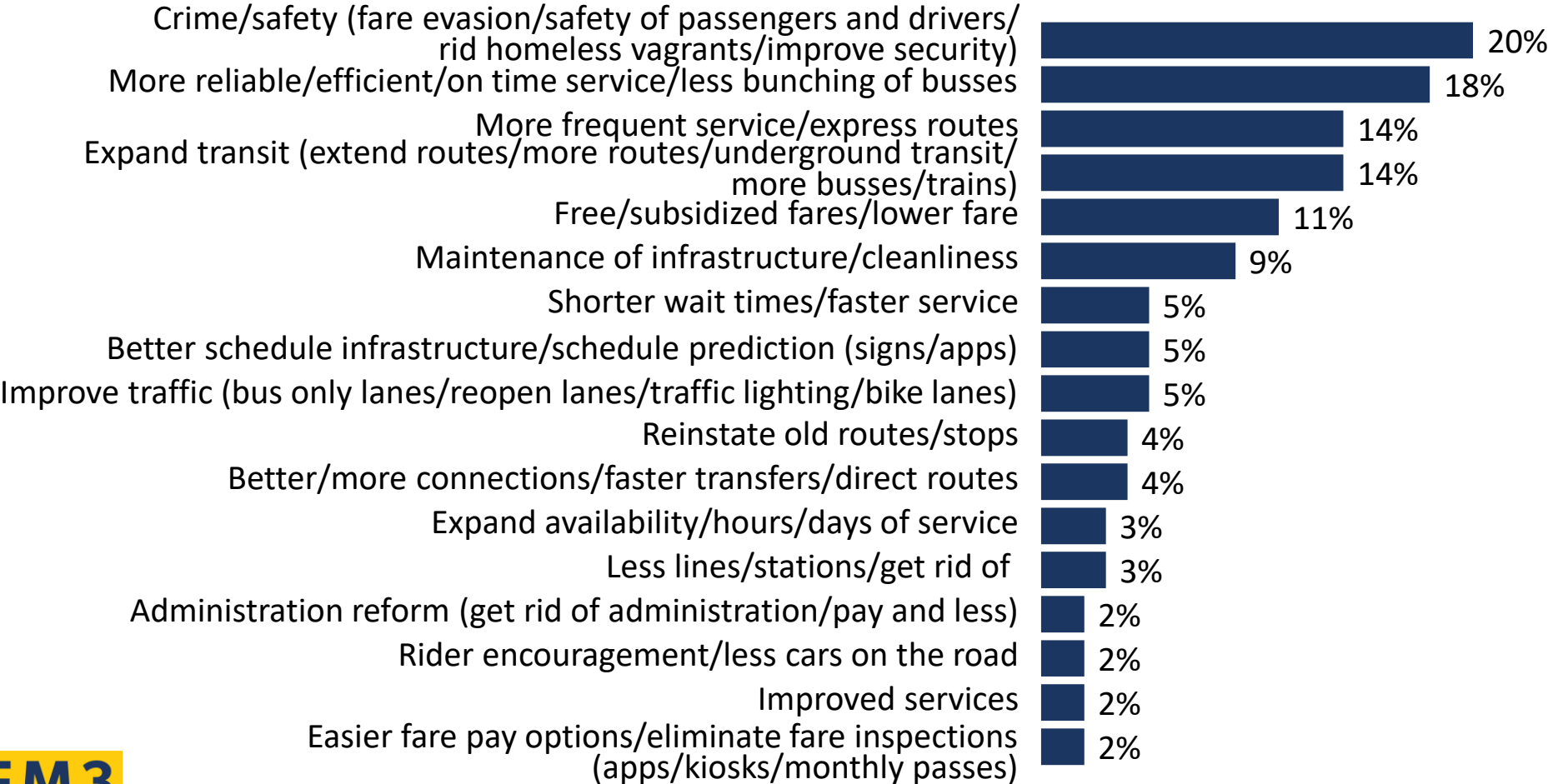| Word/Phrase	All Respondents	Non-Riders	Riders
Inefficient	**54%**	62%	50%
Does a good job of serving the whole city	**53%**	41%	59%
Outdated	**52%**	59%	47%
Trustworthy	**51%**	44%	54%
Quick way to travel	**51%**	35%	60%
Up-to-date technologically	**42%**	38%	43%
Unsafe from crime	**40%**	35%	43%
Safe from crime	**37%**	31%	41%
Well-managed	**34%**	26%	38%
Innovative	**34%**	29%	36%
Responsive to community concerns	**32%**	27%	35%

FM3
RESEARCH

Project Priorities

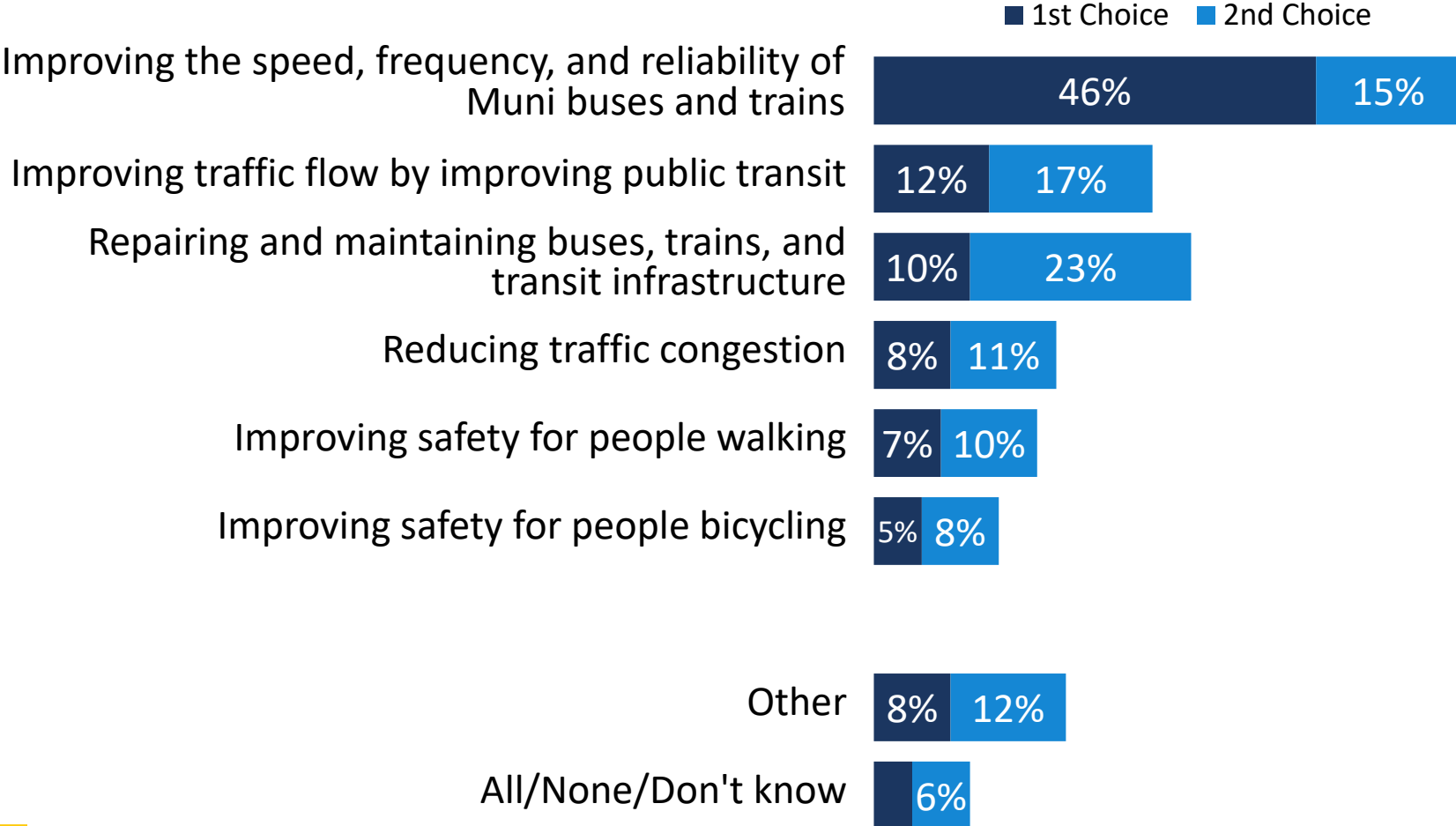# Respondents most want to see crime addressed and improved reliability and frequency.

What's the most important change you would like to see made to Muni and transportation in San Francisco?
(Open-ended; Asked of Half Sample Only, n=442)

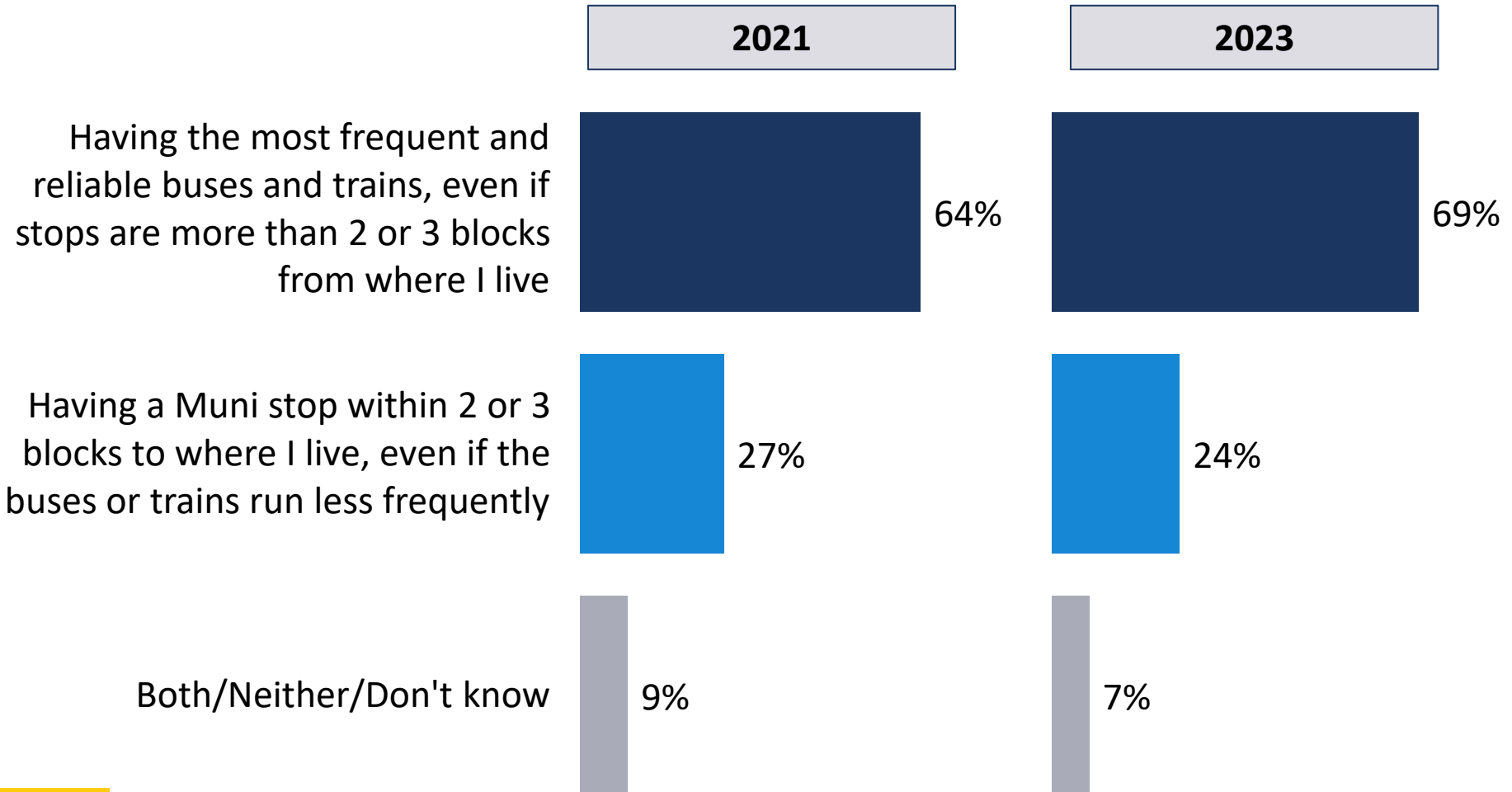| Category	%
Crime/safety (fare evasion/safety of passengers and drivers/ rid homeless vagrants/improve security)	20%
More reliable/efficient/on time service/less bunching of busses	18%
More frequent service/express routes	14%
Expand transit (extend routes/more routes/underground transit/ more busses/trains)	14%
Free/subsidized fares/lower fare	11%
Maintenance of infrastructure/cleanliness	9%
Shorter wait times/faster service	5%
Better schedule infrastructure/schedule prediction (signs/apps)	5%
Improve traffic (bus only lanes/reopen lanes/traffic lighting/bike lanes)	5%
Reinstate old routes/stops	4%
Better/more connections/faster transfers/direct routes	4%
Expand availability/hours/days of service	3%
Less lines/stations/get rid of	3%
Administration reform (get rid of administration/pay and less)	2%
Rider encouragement/less cars on the road	2%
Improved services	2%
Easier fare pay options/eliminate fare inspections (apps/kiosks/monthly passes)	2%

FM3 RESEARCH

Improving the speed, frequency and reliability of Muni buses is respondents' highest priority for the agency.

I'm going to read you some different transportation goals for San Francisco.
Please tell me which one should be the highest priority.

■ 1st Choice ■ 2nd Choice

	1st Choice	2nd Choice
Improving the speed, frequency, and reliability of Muni buses and trains	46%	15%
Improving traffic flow by improving public transit	12%	17%
Repairing and maintaining buses, trains, and transit infrastructure	10%	23%
Reducing traffic congestion	8%	11%
Improving safety for people walking	7%	10%
Improving safety for people bicycling	5%	8%
Other	8%	12%
All/None/Don't know		6%

Q7.

Respondents still overwhelmingly prefer having frequent, reliable transit over having stops close to their home.

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

	2021	2023
Having the most frequent and reliable buses and trains, even if stops are more than 2 or 3 blocks from where I live	64%	69%
Having a Muni stop within 2 or 3 blocks to where I live, even if the buses or trains run less frequently	27%	24%
Both/Neither/Don't know	9%	7%

Q8.

Repairing and maintaining Muni equipment and reducing delays are the top priorities for service.

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?

Legend: ■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know

Project	Ext. Impt.	Very Impt.	Smwt. Impt.	Not Too Impt.	Ext./Very Impt.
Repairing and maintaining Muni equipment and facilities to ensure vehicles' safety, frequency, and reliability	43%	40%	12%		84%
Reducing delays to make Muni more reliable	49%	34%	11%	5%	83%
Providing quick, convenient transit access to all parts of San Francisco	42%	39%	12%	6%	81%
Increasing safety from crime on Muni buses	52%	28%	15%	5%	79%
Increasing and improving Muni service for the communities most dependent on transit	49%	30%	13%	6%	79%
Ensuring Muni is affordable and easy to use for all San Franciscans	53%	24%	16%	6%	78%
Upgrading San Francisco's aging rail network	34%	38%	18%	6%	73%

FM3 RESEARCH

Q9. Split Sample

50

Keeping trains running on time, maintaining security and ensuring service is inclusive are also highly important.

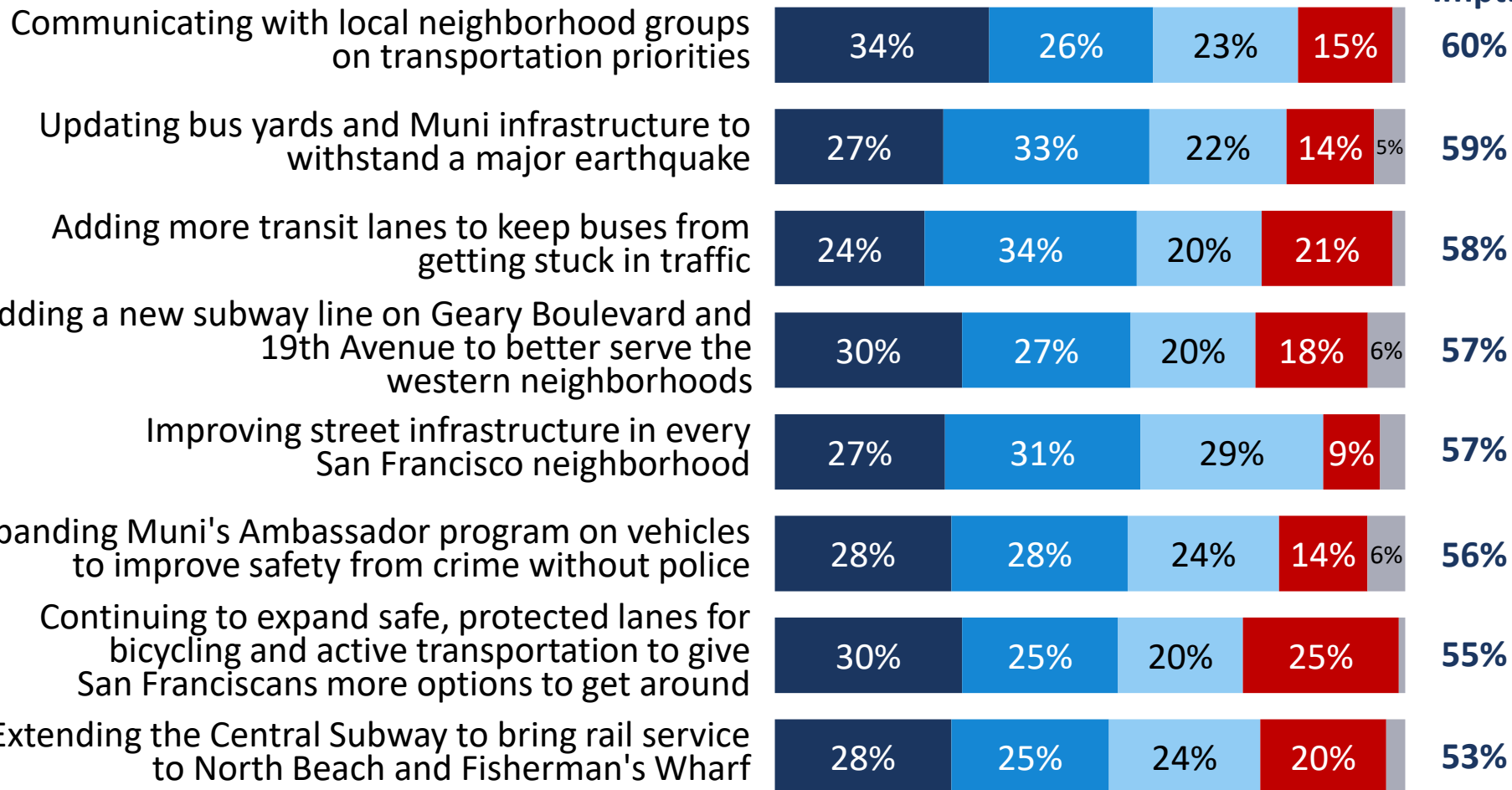■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know

Ext./Very Impt.

	Ext. Impt.	Very Impt.	Smwt. Impt.	Not Too Impt.	Don't Know	Ext./Very Impt.
Keeping Muni trains running on time in the subway from Embarcadero to Castro Street	31%	39%	19%	7%	5%	70%
Maintaining increased security on Muni to keep riders safe	45%	24%	23%	7%		69%
Ensuring Muni service is inclusive and accessible to all	38%	31%	19%	10%		69%
Improving access to public transit for people who are disabled	37%	31%	22%	9%		68%
Getting Muni on firmer financial footing	29%	39%	17%	7%	8%	68%
Making street safety improvements for walking	39%	28%	19%	12%		67%
Addressing the backlog of maintenance work before increasing inflation makes it even more expensive	27%	38%	24%	7%		66%

Q9. 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
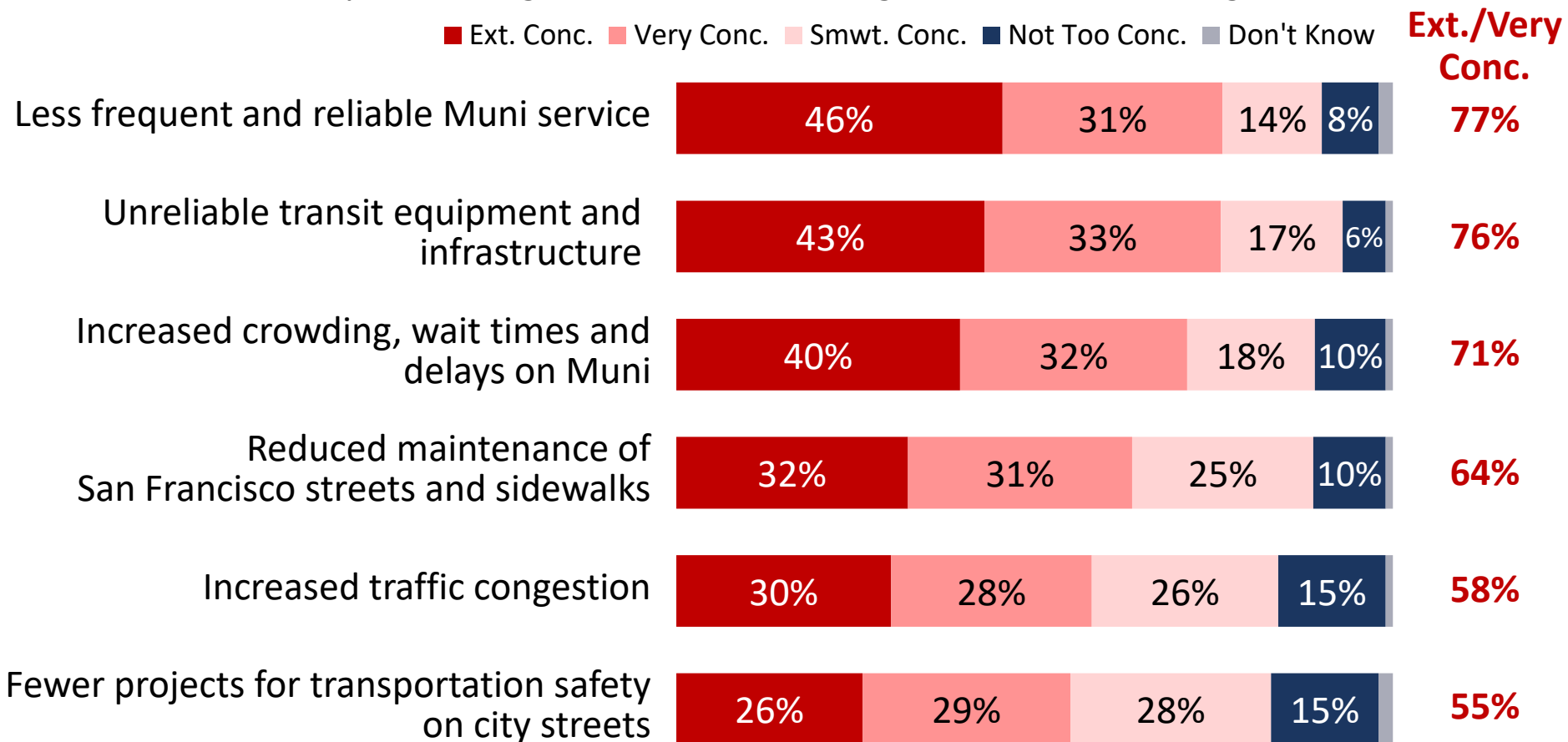
Safer sidewalks, real-time displays and improving the flow of traffic are similar in importance.

Legend: ■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know

Project	Ext. Impt.	Very Impt.	Smwt. Impt.	Not Too Impt.	Don't Know	Ext./Very Impt.
Constructing safer sidewalks and road crossings to improve safety for people walking.	37%	28%	20%	14%		65%
Improving Muni's real-time update digital displays	29%	36%	19%	15%		65%
Improving the flow of traffic	26%	39%	23%	8%		65%
Expanding reduced fares for seniors and low-income residents	41%	22%	20%	15%		64%
Adding Muni service	31%	31%	21%	9%	7%	62%
Protecting Muni infrastructure from flooding caused by sea level rise and storms	19%	43%	24%	11%		62%
Upgrading traffic signals to give priority to emergency vehicles to reduce response times	27%	34%	23%	13%		61%

Q9. 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

Three in five say communicating with neighborhood groups is important.

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

Project	Ext. Impt.	Very Impt.	Smwt. Impt.	Not Too Impt.	Don't Know	Ext./Very Impt.
Communicating with local neighborhood groups on transportation priorities	34%	26%	23%	15%		60%
Updating bus yards and Muni infrastructure to withstand a major earthquake	27%	33%	22%	14%	5%	59%
Adding more transit lanes to keep buses from getting stuck in traffic	24%	34%	20%	21%		58%
Adding a new subway line on Geary Boulevard and 19th Avenue to better serve the western neighborhoods	30%	27%	20%	18%	6%	57%
Improving street infrastructure in every San Francisco neighborhood	27%	31%	29%	9%		57%
Expanding Muni's Ambassador program on vehicles to improve safety from crime without police	28%	28%	24%	14%	6%	56%
Continuing to expand safe, protected lanes for bicycling and active transportation to give San Franciscans more options to get around	30%	25%	20%	25%		55%
Extending the Central Subway to bring rail service to North Beach and Fisherman's Wharf	28%	25%	24%	20%		53%

Q9. 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

Reducing parking in transit lanes and expanding Slow Streets are the lowest priorities.

Legend: ■ Ext. Impt. ■ Very Impt. ■ Smwt. Impt. ■ Not Too Impt. ■ Don't Know

Ext./Very Impt.

Project	Ext. Impt.	Very Impt.	Smwt. Impt.	Not Too Impt.	Don't Know	Ext./Very Impt.
Installing smart traffic signals that hold green lights for transit	26%	27%	26%	15%	6%	53%
Increasing the use of Speed Safety Cameras, red light cameras, and illegal turn cameras to improve pedestrian safety	29%	24%	22%	25%		52%
Making street safety improvements for people bicycling, like protected bikeways	27%	25%	27%	19%		52%
Keeping Muni free for youth	32%	19%	25%	24%		51%
Reducing crowding on Muni	21%	28%	31%	17%		49%
Converting Muni buses to all electric vehicles	22%	23%	34%	19%		45%
Reducing parking and driving in transit lanes	19%	24%	27%	27%		43%
Creating a citywide network of Slow Streets	16%	20%	24%	38%		36%

Q9. 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

The most concerning outcomes of SFMTA cuts would be less frequent service and unreliable equipment.

I am going to read you a list of potential outcomes if SFMTA and 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.

Outcome	Ext. Conc.	Very Conc.	Smwt. Conc.	Not Too Conc.	Ext./Very Conc.
Less frequent and reliable Muni service	46%	31%	14%	8%	**77%**
Unreliable transit equipment and infrastructure	43%	33%	17%	6%	**76%**
Increased crowding, wait times and delays on Muni	40%	32%	18%	10%	**71%**
Reduced maintenance of San Francisco streets and sidewalks	32%	31%	25%	10%	**64%**
Increased traffic congestion	30%	28%	26%	15%	**58%**
Fewer projects for transportation safety on city streets	26%	29%	28%	15%	**55%**

Q10.

FM3
RESEARCH

55

Support for Funding Muni

Nearly three-quarters still think SFMTA and Muni are in need of additional funds.

Do you think there is a great need, some need, a little need, or no real need for additional funds to improve the SFMTA and Muni's transportation and public transit system in San Francisco?

	2021	2023
Great need	41%	39%
Some need	33%	34%
	Great/ Some Need 73%	**Great/ Some Need 73%**
A little need	7%	6%
No real need	12%	15%
	A Little/No Real Need 18%	**A Little/No Real Need 21%**
Don't know	8%	5%

Great/Some Need:
78% of Muni riders
64% of Non-riders
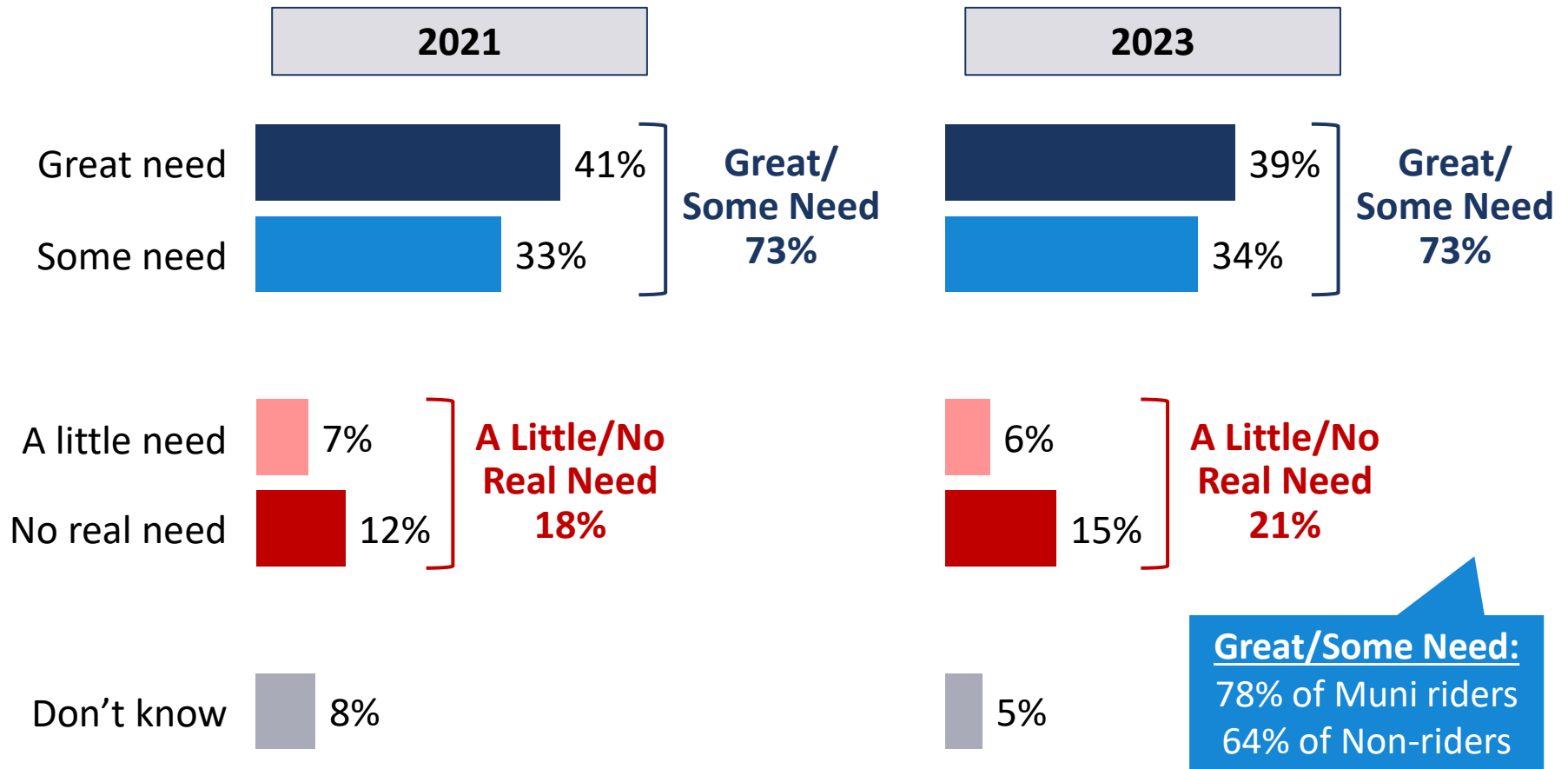
Hypothetical Bond Ballot Language Tested

Detailed Version *(Half Sample)*

To increase Muni's safety, reliability and frequency, reduce delays, improve disabled access, improve service for communities most dependent on transit, reduce traffic congestion, and improve transportation safety and 911 response times by repairing, constructing and improving aging Muni equipment, facilities and bus yards, and constructing and redesigning streets and sidewalks, and to pay related costs; shall the City and County of San Francisco issue $400 million in general obligation bonds for 30 years, with an estimated average tax rate of $0.010/$100 of assessed property value, providing $30 million annually, subject to citizen oversight and independent audits?

General Transportation Version *(Half Sample)*

To reduce traffic congestion, fix potholes, repair sidewalks, improve pedestrian safety, improve 911 response times, protect transit infrastructure from sea level rise, repair, construct and improve aging transportation infrastructure, facilities and bus yards, and to pay related costs; shall the City and County of San Francisco issue $400 million in general obligation bonds for 30 years, with an estimated average tax rate of $0.010/$100 of assessed property value, providing $30 million annually, subject to citizen oversight and independent audits?

FM3 RESEARCH

Q11. Do you think you would vote "yes" in favor of this measure or "no" to oppose it?

The more general version of the ballot measure receives stronger support.

Do you think you would vote "yes" in favor of this measure or "no" to oppose it?

Legend: ■ Def. Yes ■ Prob. Yes ■ Und., Lean Yes ■ Und., Lean No ■ Prob. No ■ Def. No ■ Undecided

	Def. Yes	Prob. Yes	Und., Lean Yes	Und., Lean No	Prob. No	Def. No	Undecided	Total Yes	Total No
Detailed Version	32%	21%	7%	6%		22%	10%	59%	31%
General Transportation Version	38%	25%	7%			17%	7%	70%	23%
Total	35%	23%	7%	5%		19%	9%	64%	27%

Q11.
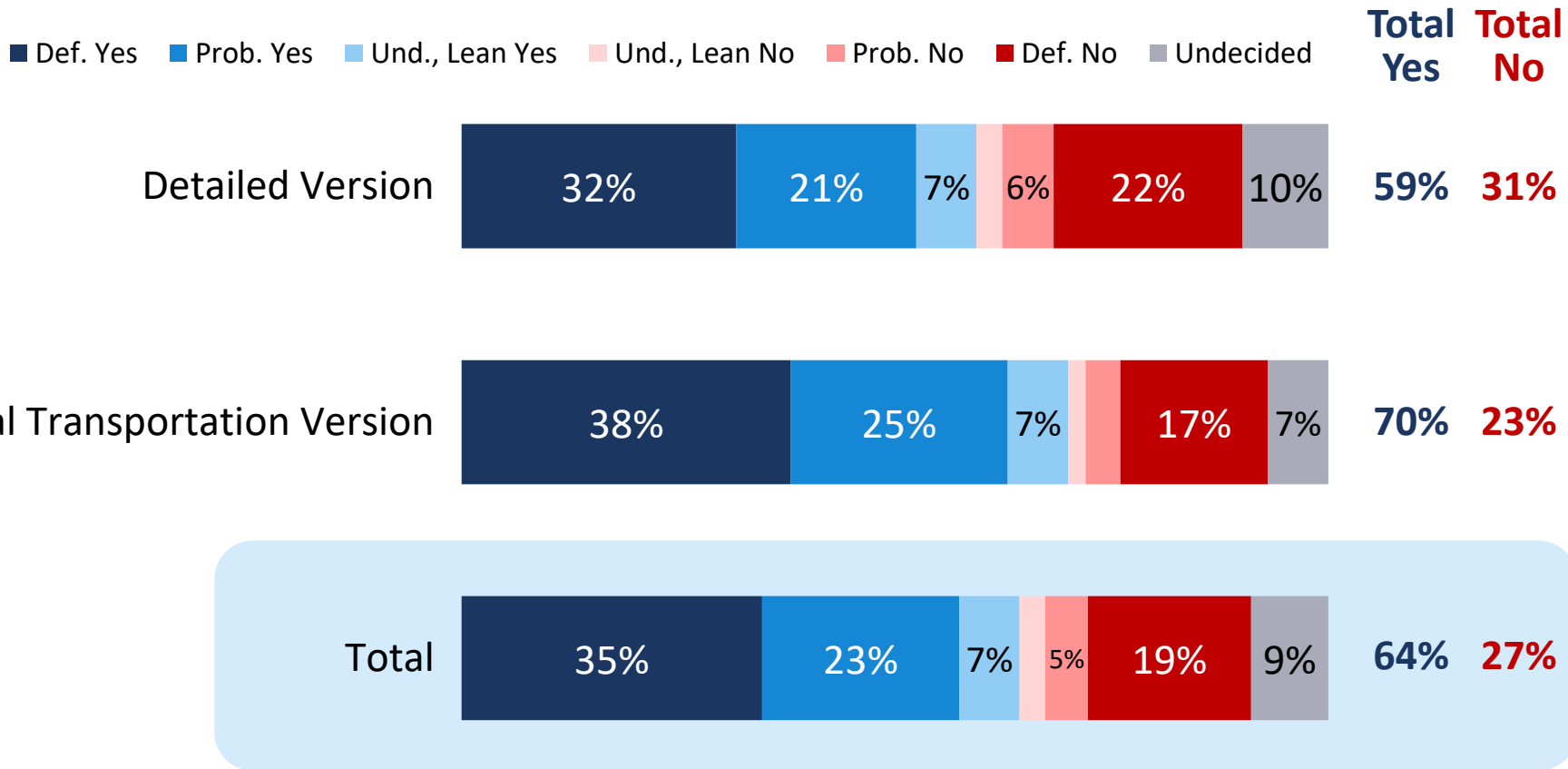
Support for the detailed measure grows by three points after messaging...

Detailed Version: To increase Muni's safety, reliability and frequency, reduce delays, improve disabled access, improve service for communities most dependent on transit, reduce traffic congestion, and improve transportation safety and 911 response times by repairing, constructing and improving deteriorating Muni bus yards, facilities, transportation infrastructure and equipment, and constructing and redesigning streets and sidewalks.

Initial Vote

Definitely yes	32%
Probably yes	21%
Undecided, lean yes	7%

Total Yes 59%

Undecided, lean no	3%
Probably no	6%
Definitely no	22%

Total No 31%

Undecided	10%

After Messaging

	36%
	19%
	7%

Total Yes 62%

	3%
	5%
	20%

Total No 29%

	9%

Q11 Split C & Q13 Split C. Do you think you would vote "yes" in favor of this measure or "no" to oppose it?
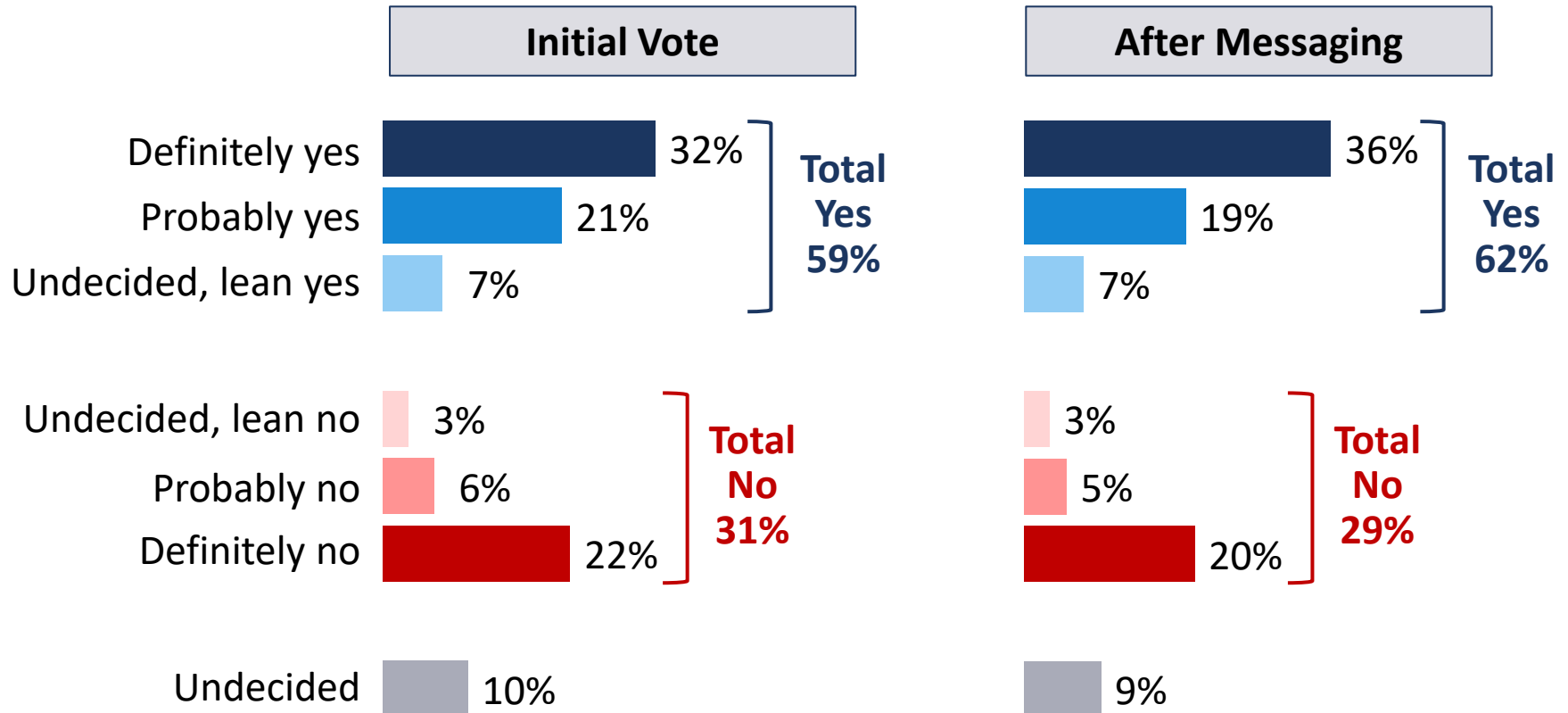
...while support for the general language grows more intense, though not broader.

General Transportation Version: To reduce traffic congestion, fix potholes, repair sidewalks, improve pedestrian safety, improve 911 response times, protect transit infrastructure from sea level rise, and repair, construct and improve aging transportation infrastructure, facilities and bus yards.

	Initial Vote	**After Messaging**
Definitely yes	38%	43%
Probably yes	25%	22%
Undecided, lean yes	7%	4%
	Total Yes 70%	**Total Yes 69%**
Undecided, lean no	2%	3%
Probably no	4%	4%
Definitely no	17%	17%
	Total No 23%	**Total No 25%**
Undecided	7%	7%

Q11 Split D & Q13 Split D. Do you think you would vote "yes" in favor of this measure or "no" to oppose it?

FM3 RESEARCH
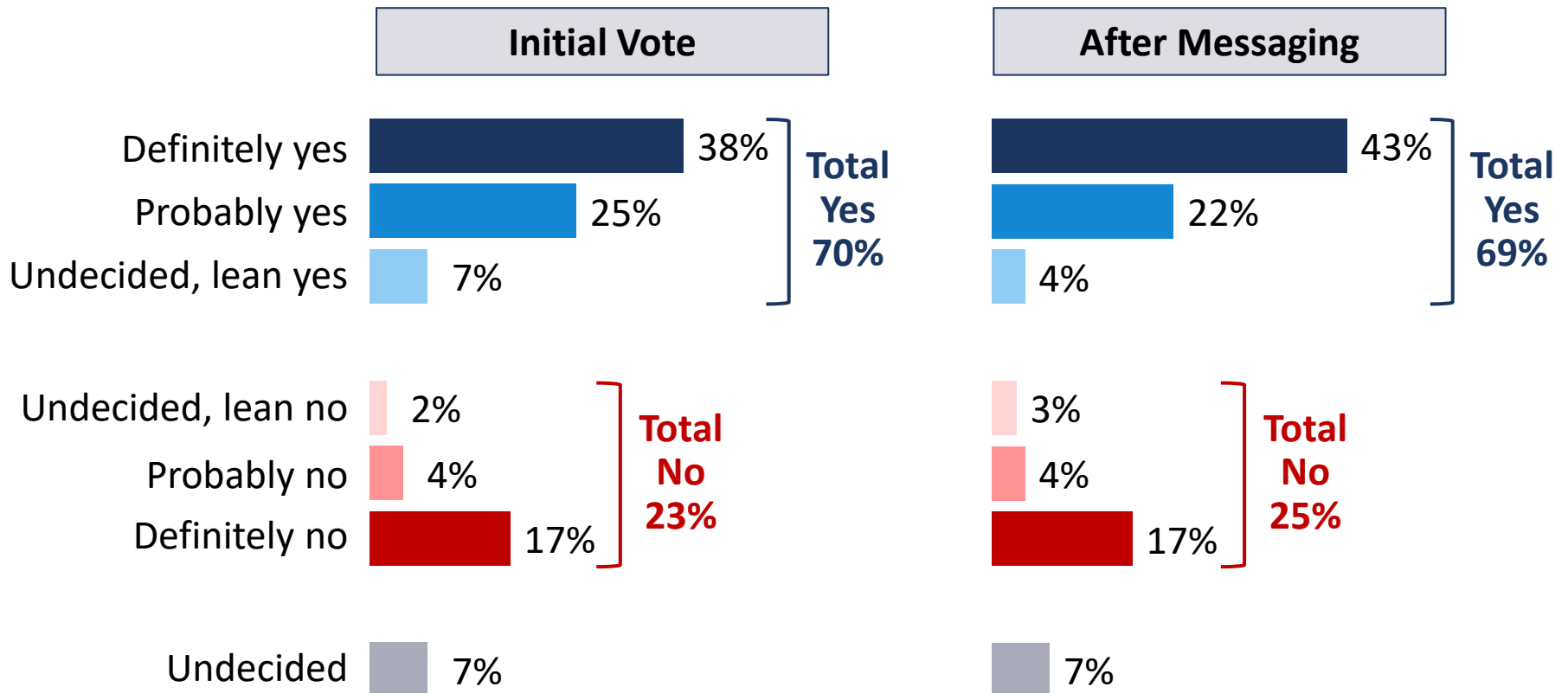
San Francisco City Survey

Survey of San Francisco Residents – 2,540 Respondents
Source: 2023 San Francisco City Survey

2023 Muni Rating

B-

In 2023, the overall Muni rating was a B-, with 46% rating Muni an A or a B. **This is the highest grade Muni has received since 2013**.
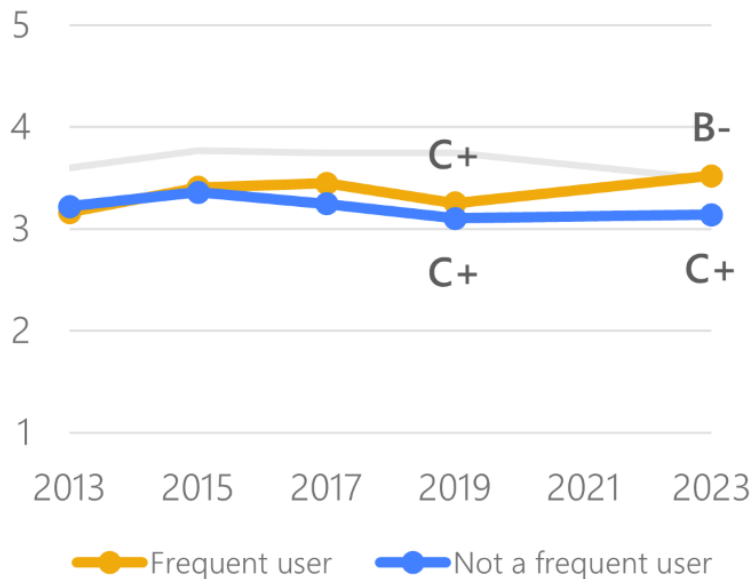
The City Survey objectively assesses San Francisco residents' use of and satisfaction with various city services every few years. The 2023 survey is the first since 2019 due to the COVID-19 pandemic. The 2023 City Survey is the 18th survey conducted.

Some high-level findings include:

- In 2023, the overall Muni rating was a B-, with 46% rating Muni an A or a B. This is the highest-grade Muni has received since 2013.

- The Muni grade *was the only overall grade to increase since 2019*, improving from a C+ to a B-.

- Frequent users tend to grade Muni slightly higher than those who don't ride Muni frequently.

Transit Rider Happiness Benchmark
Muni Responses – On-Board Real-Time Survey

Transit's *Rider Happiness Benchmarking* (RHB) Program

→ Quarterly customer satisfaction survey

→ Compares over time and across 70 agencies

→ Questions asked:
- Rider satisfaction
- Riding habits
- Demographics

→ Developed with the support of our Steering Committee members
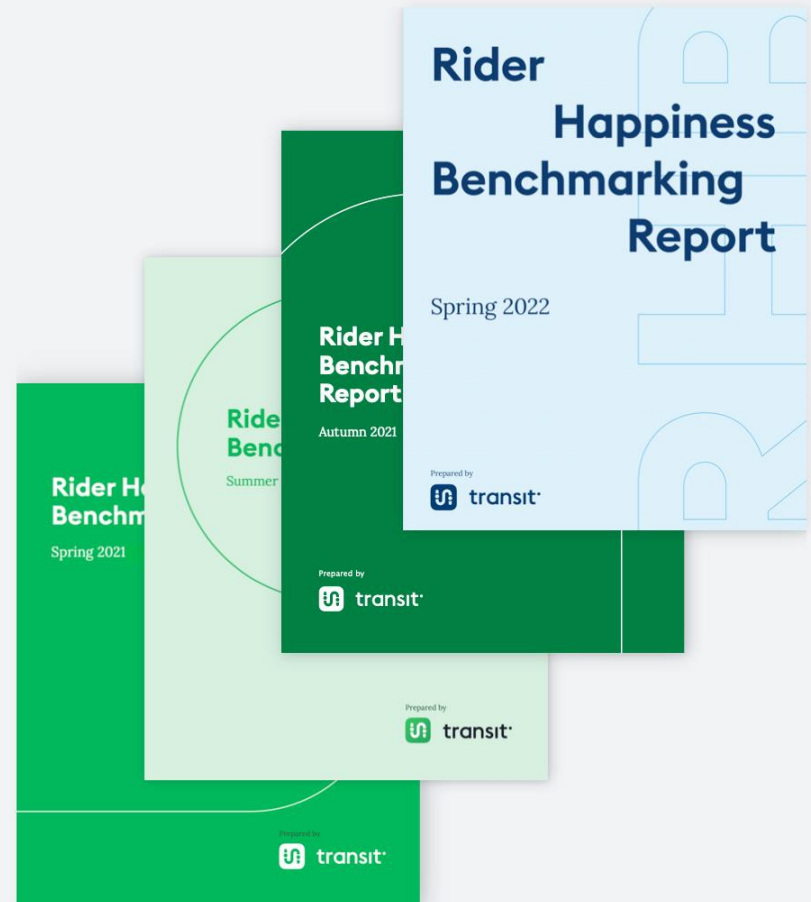
Measure overall service quality

→ NPS is a cross-industry metric used to level set overall satisfaction

→ Question is standard **How likely are you to recommend _____ to a friend?**

→ Muni is near the top and improving quarter over quarter
   - Aug 2022: -15
   - Nov 2022: -4
   - Jan 2023:   1

SOURCE: TRANSIT'S RIDER HAPPINESS BENCHMARKING SURVEY PROGRAM, JAN 2023

PRIORITIES FOR IMPROVEMENT
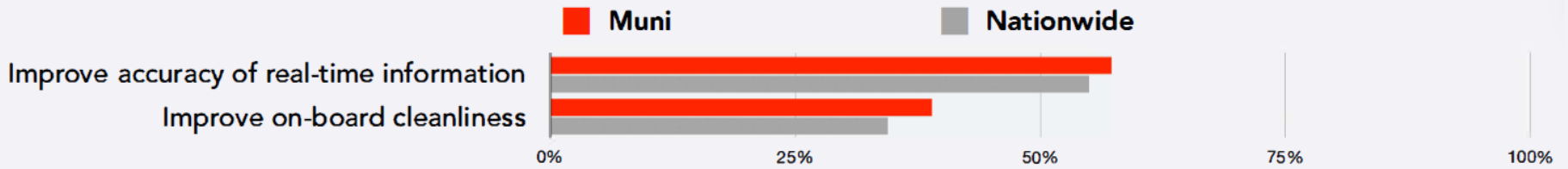
■ Muni ■ Nationwide

Improve accuracy of real-time information
Improve on-board cleanliness

SERVICE QUALITY

Driver was good at their job
Feeling safe while waiting
Arrive on time
Accurate arrival predictions

DESTINATIONS

Recreation and/or Social Activities
Errands/Appointments
Work
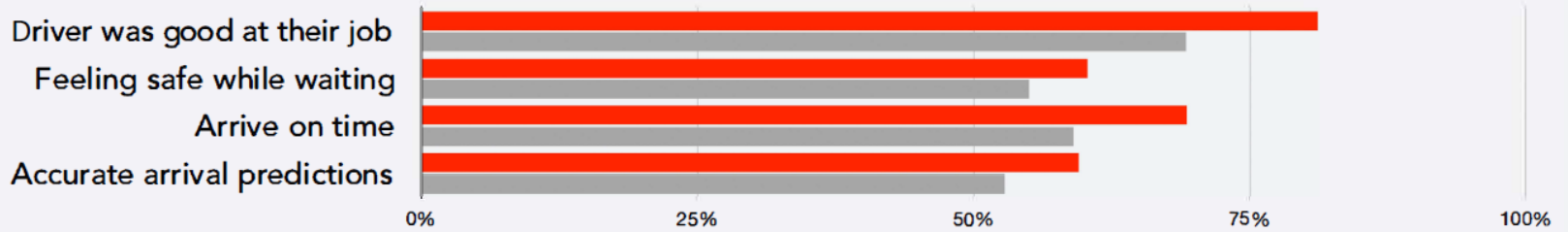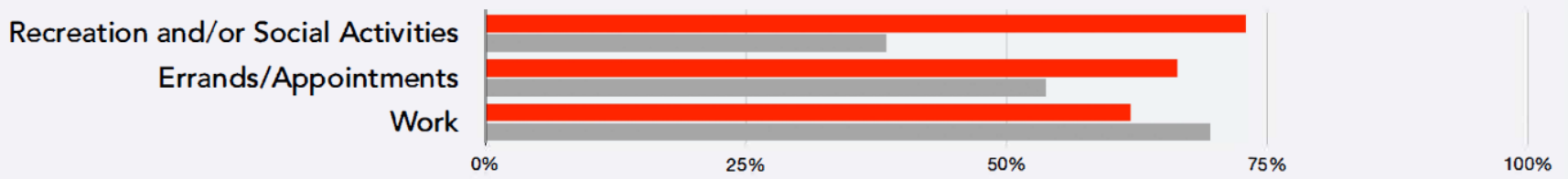
SOURCE: TRANSIT'S RIDER HAPPINESS BENCHMARKING SURVEY PROGRAM, JAN 2023

Transit's user demographics for Muni

→ **55%** are non-white

→ **31%** are over 45

→ **57%** ride 5 or more days per week

→ **16%** have trouble seeing, hearing, or walking

INCOME

22% · 22% · 17% · 39%

Under $50K
$50K to $100K
Over $100K
Prefer not to say

CAR OWNERSHIP

32% · 51% · 16%

No
No, but I have access to a car when I need to
Yes

STUDENT STATUS

6% · 11% · 11% · 71%

Postgraduate or professional degree program
Post-secondary / college
High School
No
Prefer not to say
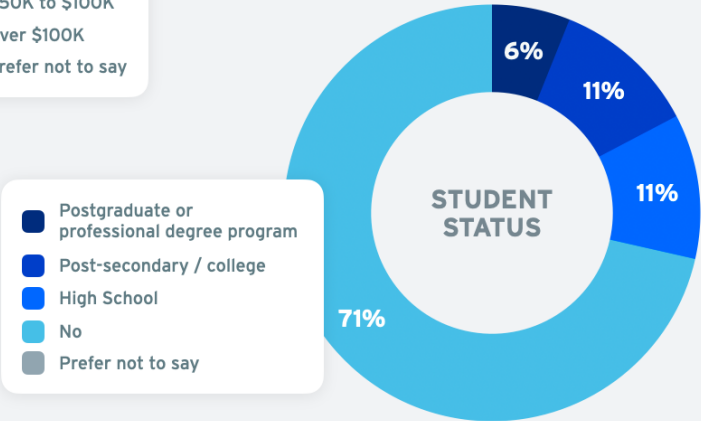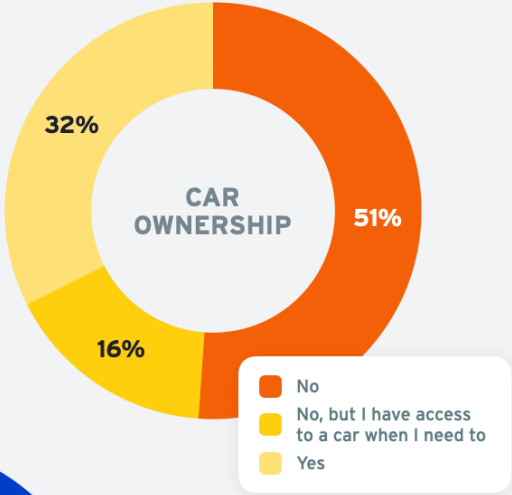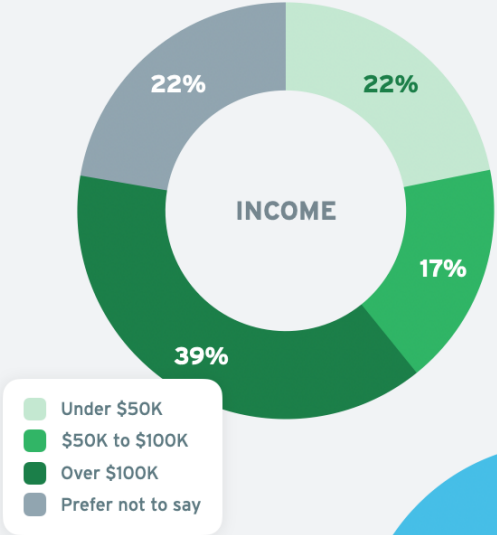
SOURCE: TRANSIT SURVEY, JAN. 2023

Focus on problem areas and monitor improvement

Number of responses that were "It's dirty!"
On day(s) [Sunday, Monday, Tuesday and 4 more] and hour(s) [All]

© 2023 Mapbox © OpenStreetMap
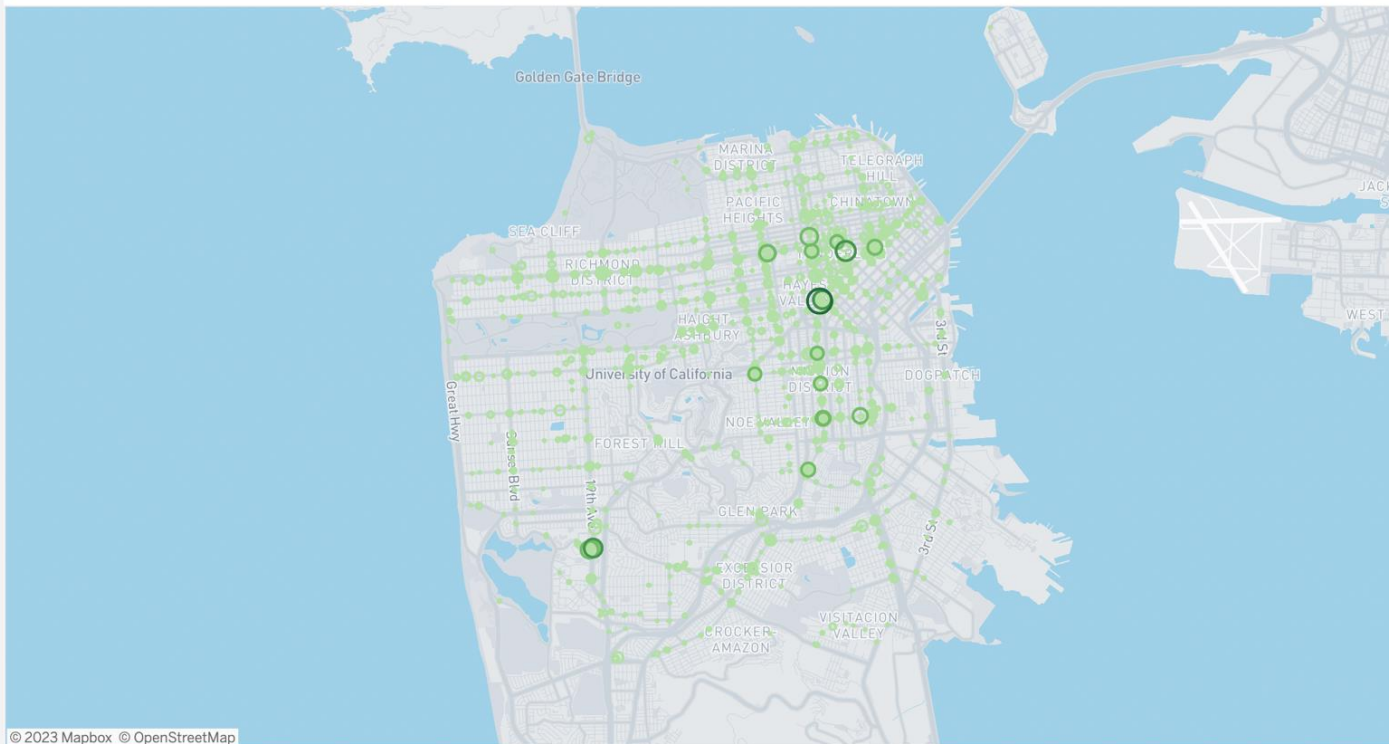
Question
How clean is this [vehicle_name] stop? ▼

Answer
It's dirty! ▼

Responses per stop
1   102

Responses per stop
○ 1
○ 20
○ 40
○ 60
○ 80
○ 102

Date range
8/16/2022 12:00:00 AM   3/6/2023 11:41:11 PM

Day of week
(All) ▼

Hour of day
(All)
< >

Min. responses per question / stop
3   234

OVERALL TRIP RATING
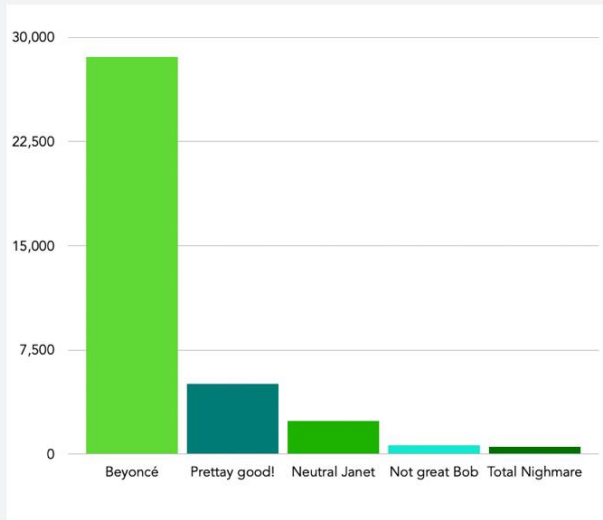
90% (3-MONTH AVERAGE) GAVE A FAVORABLE OVERALL TRIP RATING

SAFETY ONBOARD
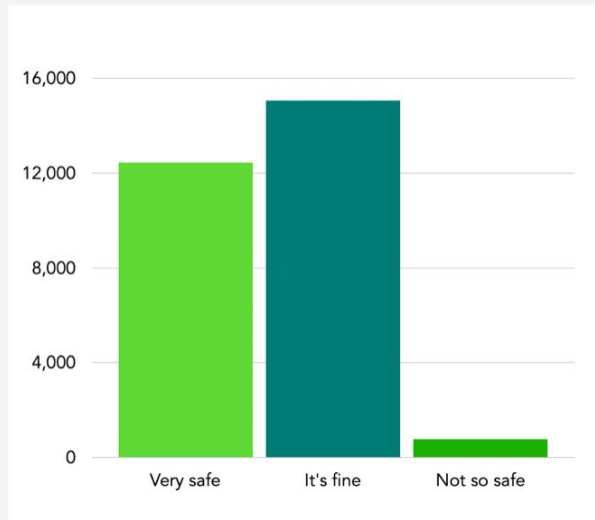
2.5% (12/12/22 - 2/13/23) DID NOT FEEL SAFE ON BOARD

STOP CLEANLINESS
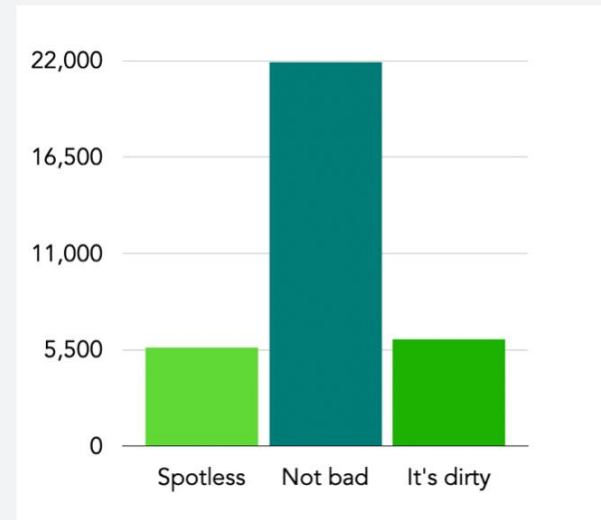
18.5% (FIRST 2-MONTH AVERAGE) THOUGHT IT WAS DIRTY

Conclusion
Listening, considering and being responsive.

We are always stiving to meet the community's needs. We listen, learn and work to constantly be better.

Our goal is to be responsive to what we hear and build the support to get to the transportation system San Franciscans want.

Thank you.

Appendix

Transportation 2050 Actions

Presented at February 2023 MTA Board Workshop
Full Source: T2050 MTA Board Presentation Full

We planned to be **adaptive** during this time.

While the pace of the recovery has slowed, we have several actions we can take.

POLICY   OPERATIONS   CAPITAL

Our goal is high quality service that builds trust. Investing in the workforce, hiring and op efficiency. Strategic capital improvements.

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.

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.

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.