Introduction

• In February 2021, the SFMTA Board as part of the annual Board of Directors workshop participated in a prototype prioritization exercise.

• Feedback from that process was that additional community opinions and data were needed on the various programs and projects as part of the exercise.

• The best way to solicit this feedback was through a consultant led survey process on the SFMTA’s services and project priorities as well as how much support the agency has.

• As the SFMTA looks to expand service and support the re-opening of the City, this data is one of many sources that will support tradeoffs and decision making.
Decisions Supported by Data

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

- **2021 SFMTA Community Survey**
  - Priorities
  - Public perceptions, priorities and support for various SFMTA services, programs and projects.

- **2020 State of Good Repair Report**
  - Infrastructure Investment Needs
  - Updated asset condition scores, infrastructure backlog costs and costs to sustain existing transportation system.

- **ConnectSF Transit Investment Strategy**
  - Strategic investments and improvements to make the current transit system work well, increase service and make the physical changes that enable new or better transit options.

- **20-Year Capital Plan**
  - Consolidated Capital Needs
  - Consolidation of capital needs for a 20-year period, including baseline infrastructure and SGR needs as well as system enhancement and expansion.

- **T2050 Transportation 2050**
  - Consolidated Transportation Needs
  - Consolidation of operating, capital and maintenance needs for San Francisco’s Transportation System, with priority programs and how we might fund them.
Decisions Supported by Data

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

**Travel Decision Survey**

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

**Muni Rider Survey**

Muni Rider satisfaction tracking usage of Muni service and understand key issues that drive overall customer satisfaction as well as barriers to using Muni.
Prior to the pandemic, 61% of riders rode Muni regularly.

Source: 2018 Muni Rider Survey, prepared by COREY, CANAPARY & GALANIS RESEARCH
Prior to the pandemic, 63% of riders rated the quality of the service as “excellent” or “good”.

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

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

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

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

Source: 2018 Muni Rider Survey, prepared by COREY, CANAPARY & GALANIS RESEARCH
Baseline – 2019 Controller’s Office City Survey

The 2019 San Francisco City Survey confirms this trend.

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

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

Source: 2019 San Francisco City Survey
San Franciscans’ Attitudes Toward SFMTA and Transit Service

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

<table>
<thead>
<tr>
<th><strong>Dates</strong></th>
<th>April 19-28, 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Survey Type</strong></td>
<td>Dual-mode Voter Survey</td>
</tr>
<tr>
<td><strong>Research Population</strong></td>
<td>Registered San Francisco Voters</td>
</tr>
<tr>
<td><strong>Total Interviews</strong></td>
<td>1,151 voters</td>
</tr>
</tbody>
</table>

100 Interviews conducted per Supervisorial District, weighted to represent true geographic distribution of voters

<table>
<thead>
<tr>
<th><strong>Margin of Sampling Error</strong></th>
<th>(Full Sample) ±3.0% at the 95% Confidence Level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(District Samples) ± 9.8% at the 95% Confidence Level</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Data Collection Modes</strong></th>
<th>Telephone Interviews</th>
<th>Online Interviews</th>
</tr>
</thead>
</table>

| **Languages** | English, Spanish and Chinese |

*(Note: Not All Results Will Sum to 100% Due to Rounding)*
Perceptions and Use of SFMTA
A majority approves of SFMTA’s performance, although only one in five “strongly” approve.

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

<table>
<thead>
<tr>
<th>Organization</th>
<th>Total Appr.</th>
<th>Total Disappr.</th>
</tr>
</thead>
<tbody>
<tr>
<td>The San Francisco Municipal Transportation Agency, also known as Muni</td>
<td>69%</td>
<td>26%</td>
</tr>
<tr>
<td>The San Francisco Municipal Transportation Agency, also known as SFMTA</td>
<td>64%</td>
<td>27%</td>
</tr>
<tr>
<td>BART</td>
<td>60%</td>
<td>21%</td>
</tr>
<tr>
<td>^San Francisco city government</td>
<td>59%</td>
<td>34%</td>
</tr>
<tr>
<td>Caltrain</td>
<td>49%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Q1. ^Not Part of Split Sample
A majority has ridden Muni at least once since the start of the pandemic...

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

- Daily: 7%
- A few times a week: 10%
- A few times a month: 13%
- Less often: 24%
- Never: 45%
- Don’t Know/Refused: 1%

Those most likely to have ridden at least a few times a month are:
- Latinos
- Don’t have access to a car
- Non-college educated men
- District 6 residents
- Chinese speakers
- Household incomes below $74,500
...but before the pandemic three-quarters said they rode 2-3 times per week.

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

<table>
<thead>
<tr>
<th>Mode of Transportation</th>
<th>Yes (%)</th>
<th>No (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ride Muni</td>
<td>75</td>
<td>25</td>
</tr>
<tr>
<td>Drive alone</td>
<td>55</td>
<td>45</td>
</tr>
<tr>
<td>Use a ride hail service like Uber or Lyft</td>
<td>52</td>
<td>47</td>
</tr>
<tr>
<td>Ride BART</td>
<td>46</td>
<td>53</td>
</tr>
<tr>
<td>Ride a bicycle</td>
<td>27</td>
<td>72</td>
</tr>
<tr>
<td>Carpool</td>
<td>26</td>
<td>73</td>
</tr>
<tr>
<td>Ride Caltrain</td>
<td>18</td>
<td>81</td>
</tr>
</tbody>
</table>
Most respondents’ impressions of Muni are based on their experiences riding *pre*-pandemic.

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

- Riding pre-pandemic: 71%
- Riding since the start of the pandemic: 14%
- Heard about recently: 10%
- Don’t know/Refused: 5%
A majority says Muni service is “good” but only one in ten say it is “excellent.”

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

- **Excellent**: 9%
- **Good**: 53%
- **Not so good**: 23%
- **Poor**: 9%
- **Don’t know**: 6%

<table>
<thead>
<tr>
<th>Excellent</th>
<th>9%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good</td>
<td>53%</td>
</tr>
<tr>
<td>Not so good</td>
<td>23%</td>
</tr>
<tr>
<td>Poor</td>
<td>9%</td>
</tr>
</tbody>
</table>

**Ride Muni at Least a Few Times a Month**
- **75%**
- **24%**

**Ride Muni Less Often**
- **64%**
- **33%**

**Never Ride Muni**
- **52%**
- **38%**
- **10%**
Respondents’ descriptions of Muni reflect contrasting impressions.

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

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

<table>
<thead>
<tr>
<th>Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unreliable/inconvenient/slow</td>
<td>17%</td>
</tr>
<tr>
<td>Efficient/reliable/dependable</td>
<td>12%</td>
</tr>
<tr>
<td>Negative/needs improvement</td>
<td>11%</td>
</tr>
<tr>
<td>Convenient/easy to use</td>
<td>9%</td>
</tr>
<tr>
<td>It's OK/doing their best</td>
<td>9%</td>
</tr>
<tr>
<td>Necessary/essential/useful</td>
<td>8%</td>
</tr>
<tr>
<td>Public transportation/bus service</td>
<td>7%</td>
</tr>
<tr>
<td>Good/great</td>
<td>6%</td>
</tr>
<tr>
<td>Expensive</td>
<td>6%</td>
</tr>
<tr>
<td>Dirty</td>
<td>5%</td>
</tr>
<tr>
<td>Dangerous/rough</td>
<td>4%</td>
</tr>
<tr>
<td>Crowded</td>
<td>3%</td>
</tr>
<tr>
<td>Mixed feelings</td>
<td>2%</td>
</tr>
</tbody>
</table>

Q2.

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

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

MUNI has definitely improved a lot since the early 1990s. I appreciate the increased reliability and expansion of services over the years.
San Franciscans perceive a wide range of benefits to Muni.

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

- A vital part of the community: 92% Total Well, 6% Total Not Well, Difference +86%
- Good for the environment: 82% Total Well, 11% Total Not Well, Difference +71%
- Easy to use: 83% Total Well, 15% Total Not Well, Difference +68%
- Easily accessible: 78% Total Well, 18% Total Not Well, Difference +60%
- Convenient: 74% Total Well, 25% Total Not Well, Difference +49%
- Affordable: 71% Total Well, 25% Total Not Well, Difference +46%
- Does a good job of serving the whole city: 63% Total Well, 31% Total Not Well, Difference +32%
- Trustworthy: 63% Total Well, 33% Total Not Well, Difference +30%
- Reliable: 62% Total Well, 36% Total Not Well, Difference +26%
- Up-to-date technologically: 55% Total Well, 37% Total Not Well, Difference +18%
- Responsive to community concerns: 42% Total Well, 36% Total Not Well, Difference +6%
- Well-managed: 44% Total Well, 43% Total Not Well, Difference +1%
- Fast: 48% Total Well, 49% Total Not Well, Difference -1%
- Uses taxpayer money efficiently: 38% Total Well, 40% Total Not Well, Difference -2%
- Innovative: 40% Total Well, 52% Total Not Well, Difference -12%
- Safe from crime: 42% Total Well, 54% Total Not Well, Difference -12%
At the same time, they have concerns about it being “crowded” and “dirty.”

Q7. Here is a series of words and phrases that someone might use to describe Muni. Please tell me if it describes Muni as an organization very well, somewhat well, not too well, or not at all well. Split Sample
Project Priorities
The most important change respondents mention wanting to see is increased service.

What’s the most important change you would like to see made to Muni?

*(Open-ended; Asked of Hal Sample; n=575)*

<table>
<thead>
<tr>
<th>Change</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More stops/more buses, trains/24-hour service</td>
<td>18%</td>
</tr>
<tr>
<td>Clean</td>
<td>13%</td>
</tr>
<tr>
<td>More routes/tunnels</td>
<td>13%</td>
</tr>
<tr>
<td>Improve reliability/on time</td>
<td>13%</td>
</tr>
<tr>
<td>Improve safety</td>
<td>12%</td>
</tr>
<tr>
<td>Reduced rates/free rides</td>
<td>10%</td>
</tr>
<tr>
<td>Open all routes/return to full service</td>
<td>7%</td>
</tr>
<tr>
<td>Faster speeds/dedicated bus lanes</td>
<td>5%</td>
</tr>
<tr>
<td>Upgrade system</td>
<td>4%</td>
</tr>
<tr>
<td>Better drivers/management</td>
<td>4%</td>
</tr>
<tr>
<td>Real time schedule information</td>
<td>3%</td>
</tr>
<tr>
<td>Everyone pays to get on/rule enforcement</td>
<td>3%</td>
</tr>
<tr>
<td>Accessibility/easy to use</td>
<td>2%</td>
</tr>
</tbody>
</table>

I want it to be safer and cleaner.

Expanded service area and more help for lower income people.

More extensive service of the rail component across the city combined with greater density along existing transport corridors.
Improving the speed, frequency, and reliability of Muni buses and trains is the top priority.

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

- Improving the speed, frequency, and reliability of Muni buses and trains: 43% (1st Choice), 23% (2nd Choice)
- Reducing traffic congestion and eliminating bottlenecks by improving public transit: 19% (1st Choice), 23% (2nd Choice)
- Repairing and maintaining buses, trains, and transit infrastructure: 14% (1st Choice), 25% (2nd Choice)
- Improving pedestrian safety: 8% (1st Choice), 11% (2nd Choice)
- Improving bike safety: 5% (1st Choice)
Having frequent service is seen as a higher priority than having service very close to one’s home.

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

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

  OR

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

64% 27% 9%

Both/Neither/Don't know
I am going to read you several pairs of statements about Muni. When thinking about improving Muni service, which is more important:

- Having more frequent, reliable service rather than lowering fares for everyone — 63%
- Lowering fares for everyone rather than having more frequent, reliable Muni service — 28%
- Both/Neither/Don't know — 10%

### By Group:

- **Latinos**:
  - Frequent/Not Cheaper: 49%
  - Cheaper But Infrequent: 39%
  - Both/Neither/Don't Know: 12%

- **African Americans**:
  - Frequent/Not Cheaper: 48%
  - Cheaper But Infrequent: 43%
  - Both/Neither/Don't Know: 10%

- **Chinese**:
  - Frequent/Not Cheaper: 56%
  - Cheaper But Infrequent: 33%
  - Both/Neither/Don't Know: 11%

- **All AAPI**:
  - Frequent/Not Cheaper: 61%
  - Cheaper But Infrequent: 31%
  - Both/Neither/Don't Know: 8%

- **All Voters of Color**:
  - Frequent/Not Cheaper: 55%
  - Cheaper But Infrequent: 35%
  - Both/Neither/Don't Know: 10%

- **Whites**:
  - Frequent/Not Cheaper: 72%
  - Cheaper But Infrequent: 20%
  - Both/Neither/Don't Know: 8%

### By Income:

- **Income under $35K**:
  - Frequent/Not Cheaper: 35%
  - Cheaper But Infrequent: 45%
  - Both/Neither/Don't Know: 20%

- **Income $35-52K**:
  - Frequent/Not Cheaper: 55%
  - Cheaper But Infrequent: 35%
  - Both/Neither/Don't Know: 10%

- **Income $52-75K**:
  - Frequent/Not Cheaper: 61%
  - Cheaper But Infrequent: 29%
  - Both/Neither/Don't Know: 10%

- **Income $75-175K**:
  - Frequent/Not Cheaper: 68%
  - Cheaper But Infrequent: 27%
  - Both/Neither/Don't Know: 5%

- **Income $175K+**:
  - Frequent/Not Cheaper: 76%
  - Cheaper But Infrequent: 16%
  - Both/Neither/Don't Know: 8%
Providing quick, convenient transit, repairing and maintaining Muni equipment and improving service for communities dependent on transit are the highest-priority improvements.

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

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Providing quick, convenient transit access to all parts of San Francisco</td>
<td>44%</td>
<td>36%</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repairing and maintaining Muni equipment and facilities to ensure vehicles' safety, frequency, and reliability</td>
<td>43%</td>
<td>37%</td>
<td>14%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increasing and improving Muni service for the communities most dependent on transit</td>
<td>44%</td>
<td>35%</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensuring Muni service is inclusive and accessible to all</td>
<td>39%</td>
<td>39%</td>
<td>16%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reducing delays to make Muni more reliable</td>
<td>40%</td>
<td>36%</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improving the flow of traffic</td>
<td>30%</td>
<td>39%</td>
<td>24%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Q13. I am going to read you a list of projects SFMTA might prioritize in the future to improve service to San Franciscans. Please tell me how important each project should be for Muni: extremely important, very important, somewhat important, or not too important? Split Sample

<table>
<thead>
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</thead>
<tbody>
<tr>
<td>Restoring Muni service to pre-pandemic levels</td>
<td>32%</td>
<td>37%</td>
<td>20%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Improving access to public transit for people who are disabled</td>
<td>37%</td>
<td>32%</td>
<td>19%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Expanding reduced fares for youth, seniors, and low-income residents</td>
<td>35%</td>
<td>32%</td>
<td>18%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Addressing the backlog of maintenance work</td>
<td>27%</td>
<td>41%</td>
<td>22%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Rebuilding San Francisco's aging rail network</td>
<td>33%</td>
<td>34%</td>
<td>22%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Making street safety improvements for walking</td>
<td>32%</td>
<td>33%</td>
<td>23%</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

Restoring Muni service, improving access for people who are disabled and expanding reduced fares were also perceived as important priorities, although with less urgency.
Q13. I am going to read you a list of projects SFMTA might prioritize in the future to improve service to San Franciscans. Please tell me how important of a priority each project should be for Muni: extremely important, very important, somewhat important, or not too important? Split Sample

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Reducing crowding on Muni</td>
<td>32%</td>
<td>33%</td>
<td>24%</td>
<td>8%</td>
<td></td>
<td>65%</td>
</tr>
<tr>
<td>Reducing delays and train congestion in the Muni Metro subway from</td>
<td>30%</td>
<td>32%</td>
<td>22%</td>
<td>7%</td>
<td>9%</td>
<td>62%</td>
</tr>
<tr>
<td>Embarcadero to Castro Street</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Getting Muni on firmer financial footing</td>
<td>25%</td>
<td>35%</td>
<td>26%</td>
<td>7%</td>
<td>7%</td>
<td>60%</td>
</tr>
<tr>
<td>Increasing Muni service above pre-pandemic levels</td>
<td>25%</td>
<td>33%</td>
<td>27%</td>
<td>9%</td>
<td>6%</td>
<td>58%</td>
</tr>
<tr>
<td>Improving Muni's real-time update digital signs</td>
<td>25%</td>
<td>32%</td>
<td>30%</td>
<td>10%</td>
<td></td>
<td>57%</td>
</tr>
<tr>
<td>Building a modern light rail system</td>
<td>29%</td>
<td>26%</td>
<td>24%</td>
<td>14%</td>
<td>7%</td>
<td>55%</td>
</tr>
</tbody>
</table>
## A majority say it is important to add more transit lanes and convert Muni busses to EV.

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Adding more transit only lanes to keep buses from getting stuck in traffic</td>
<td>25%</td>
<td>29%</td>
<td>27%</td>
<td>15%</td>
<td>54%</td>
</tr>
<tr>
<td>Converting Muni buses to all electric vehicles</td>
<td>26%</td>
<td>27%</td>
<td>27%</td>
<td>15%</td>
<td>53%</td>
</tr>
<tr>
<td>Making street safety improvements for people bicycling, like protected bikeways</td>
<td>22%</td>
<td>30%</td>
<td>27%</td>
<td>19%</td>
<td>52%</td>
</tr>
<tr>
<td>Installing smart traffic signals that hold green lights for transit</td>
<td>20%</td>
<td>33%</td>
<td>29%</td>
<td>13%</td>
<td>52%</td>
</tr>
<tr>
<td>Adding a new subway line on Geary and 19th Avenue to better serve the western neighborhoods</td>
<td>24%</td>
<td>27%</td>
<td>25%</td>
<td>16%</td>
<td>51%</td>
</tr>
<tr>
<td>Maintaining and restoring cable car service</td>
<td>24%</td>
<td>25%</td>
<td>32%</td>
<td>16%</td>
<td>49%</td>
</tr>
</tbody>
</table>
Q13. I am going to read you a list of projects SFMTA might prioritize in the future to improve service to San Franciscans. Please tell me how important of a priority each project should be for Muni: extremely important, very important, somewhat important, or not too important? Split Sample

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

<table>
<thead>
<tr>
<th>Project</th>
<th>Ext./Very</th>
<th>Very</th>
<th>Somewhat</th>
<th>Not Too</th>
<th>Don't Know</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding more HOV lanes on freeways and highways to provide express service for longer trips within San Francisco and the region</td>
<td>16%</td>
<td>20%</td>
<td>32%</td>
<td>27%</td>
<td>6%</td>
<td>36%</td>
</tr>
<tr>
<td>Making the Slow Streets Program permanent</td>
<td>15%</td>
<td>17%</td>
<td>25%</td>
<td>35%</td>
<td>8%</td>
<td>32%</td>
</tr>
<tr>
<td>Extending the Central Subway to bring rail service to Fisherman's Wharf</td>
<td>19%</td>
<td>23%</td>
<td>29%</td>
<td>24%</td>
<td>6%</td>
<td>42%</td>
</tr>
<tr>
<td>Increasing the use of Speed Safety Cameras, red light cameras, and illegal turn cameras to improve pedestrian safety</td>
<td>24%</td>
<td>20%</td>
<td>28%</td>
<td>25%</td>
<td>5%</td>
<td>44%</td>
</tr>
<tr>
<td>Allowing restaurants and businesses to use curbside and public outdoor spaces permanently</td>
<td>24%</td>
<td>22%</td>
<td>20%</td>
<td>28%</td>
<td>5%</td>
<td>46%</td>
</tr>
<tr>
<td>Updating bus yards for earthquake safety</td>
<td>20%</td>
<td>27%</td>
<td>32%</td>
<td>14%</td>
<td>8%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Q13. I am going to read you a list of projects SFMTA might prioritize in the future to improve service to San Franciscans. Please tell me how important of a priority each project should be for Muni: extremely important, very important, somewhat important, or not too important? Split Sample
When asked about a series of potential cuts to Muni, those directly highlighting a reduction in service were most concerning.

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

**Muni employee layoffs leading to a 15% cut in service**
- Extremely Concerning: 39%
- Very Concerning: 32%
- Somewhat Concerning: 20%
- Not Too Concerning: 7%
- Don't Know: 7%
- Total: 71%

**^Less frequent and reliable service**
- Extremely Concerning: 37%
- Very Concerning: 33%
- Somewhat Concerning: 21%
- Not Too Concerning: 6%
- Don't Know: 7%
- Total: 70%

**Muni employee layoffs**
- Extremely Concerning: 28%
- Very Concerning: 30%
- Somewhat Concerning: 26%
- Not Too Concerning: 13%
- Don't Know: 7%
- Total: 58%
Slow Streets
A majority has heard at least a little about the Slow Streets Program recently.

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

- Yes, a great deal: 26%
- Yes, a little: 27%
- No/Don't know: 47%

Total Aware 53%
During the pandemic, SFMTA implemented the “Slow Streets” program that limits through-traffic on certain residential streets to be used as a public space for people traveling by foot and by bicycle. Nearly 30 corridors have become slow streets throughout the city. On these Slow Streets, signage and barricades have been placed to minimize vehicle traffic and prioritize walking and biking.
A majority supports making Slow Streets permanent and expanding it.

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

<table>
<thead>
<tr>
<th>Awareness of Slow Streets</th>
<th>Total Support 55%</th>
<th>Total Oppose 34%</th>
<th>Don't Know 8%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware</td>
<td>61%</td>
<td>30%</td>
<td>8%</td>
</tr>
<tr>
<td>Unaware</td>
<td>48%</td>
<td>39%</td>
<td>12%</td>
</tr>
</tbody>
</table>

- **Total Support**: 55%
  - Strongly support: 36%
  - Somewhat support: 19%
- **Total Oppose**: 34%
  - Somewhat oppose: 11%
  - Strongly oppose: 23%
- **Don't know**: 11%

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**FM3 Research**

Q12.
Support for Funding Muni
Nearly three-quarters agree there is a need for more Muni funding.

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

- Great need: 41%
- Some need: 33%
- A little need: 7%
- No real need: 12%
- Don't know: 8%
Nearly four in five conceptually support funding proposals on a future ballot.

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

<table>
<thead>
<tr>
<th>Support</th>
<th>Strongly support</th>
<th>Somewhat support</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>49%</td>
<td>29%</td>
</tr>
<tr>
<td>Oppose</td>
<td>4%</td>
<td>9%</td>
</tr>
<tr>
<td>Don't know</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

Total Support 78%
Total Oppose 13%
Conclusions
Conclusions

• Overall, most approve of the job being done by SFMTA and think the quality of service is good, but few say it is “excellent” or have strongly positive opinions about Muni.

• The most commonly-chosen adjectives to describe Muni are favorable ones; respondents indicate that it is a vital part of the community, easy to use, and good for the environment.

• Respondents prioritize using funds to repair and maintain Muni equipment and facilities, provide quick convenient access to all parts of San Francisco, increase and improve Muni service for the communities most dependent on transit, and ensure Muni service is inclusive and accessible to all.

• Additionally, a majority favors having frequent and reliable service over service very close to where they live; a similar number prefers to have more frequent and reliable service over having lower fares.

• Approximately three-quarters see a need for additional funding and a large majority conceptually backs potential funding proposals to provide it.
Thank you.