

## **Muni Equity Working Group**

October 23, 2025

## **Agenda**

Time	ltem
5:30 p.m.	Welcome
5:40 p.m.	Summer Service Cuts: Intercept Survey Results
6:00 p.m.	SFMTA's Budget Outlook
6:30 p.m.	Muni Equity Strategy Update
6:40 p.m.	2025 Title VI Program Update
7:00 p.m.	Meeting adjourns



# June 21, 2025 Service Change Survey Findings

Prepared by Transit Performance and Technology (TPAT)

October 2025

#### Survey Instrument & Methods

- Intercept survey conducted in August
- SFMTA posted posters, sent e-blast to route subscribers staff rode lines and offered riders QR code to complete digital survey
- Staff had paper surveys on hand for riders without smartphones
- Survey available in English, Spanish, Traditional Chinese and Filipino
- 818 responses collected

#### Impressions of Muni Service

- Impressions of Muni service remain positive when directly asked about a trip
- Across all lines, most respondents rated their trip as Excellent, Good, or Fair
- No line significantly deviated from this, but 5R Fulton Rapid and 9 San
   Bruno stand out as outliers for discussion

Frequent riders by line when asked: "Overall, how would you describe this trip?"

Line	Excellent	Good	Fair	Poor
5 Fulton	22%	33%	30%	15%
5R Fulton Rapid	19%	28%	28%	23%
6 Hayes-Parnassus	32%	39%	17%	12%
7 Haight-Noriega	13%	42%	25%	19%
9 San Bruno	12%	26%	44%	17%
9R San Bruno Rapid	21%	33%	26%	19%
31 Balboa	22%	35%	27%	14%

<sup>\*</sup>Excludes small percentage of riders who said they didn't know or weren't sure

## Impressions of Service Changes

- Respondents were less positive when asked about their experience after the change
- Approximately half of riders said their overall experience had worsened
- This figure was ~70% for the 5 Fulton and 5R Fulton Rapid

Frequent riders by line when asked: "How has your experience on this route changed?"

Line	It has not changed	It is somewhat better	It is much better	It is somewhat worse	It is much worse
5 Fulton	28%	7%	5%	30%	28%
5R Fulton Rapid	24%	3%	2%	32%	38%
6 Hayes-Parnassus	25%	14%	8%	30%	19%
7 Haight-Noriega	25%	2%	5%	31%	36%
9 San Bruno	45%	5%	2%	27%	20%
9R San Bruno Rapid	50%	2%	2%	19%	24%
31 Balboa	31%	1%	10%	24%	30%

<sup>\*</sup>Excludes small percentage of riders who said they didn't know or weren't sure

#### **Transfers**

Riders who added a transfer when asked about a change in their travel times.

	Count	Percentage
Increased less than 5 minutes	11	7%
Increased by 5-10 minutes	46	30%
Increased by 10-15 minutes	47	31%
Increased by 15-30 minutes	38	25%
Increased by more than 30 minutes		
	4	3%
No impact	3	2%

Riders who added a transfer when asked to describe their transfer experience

	Count	Percentage
Very inconvenient	72	47%
Somewhat inconvenient	43	28%
Neither convenient nor inconvenient		
	13	9%
Somewhat convenient	19	12%
Very convenient	6	4%

- 150/818 respondents added a transfer to their typical trip after the service change
- Those who added a transfer were slightly more likely to say the change was negative
- Respondents indicated that adding a transfer increased their trip travel times and that the transfers were more inconvenient than not

## Crowding

- Perceptions of crowding after the 6/21 change varied between lines
- Riders on the **5/5R** and the **7** reported more crowding than those on other lines
- Respondents mostly only reported that crowding was the same, or it was greater.
   Few respondents said crowding decreased.
- Increased crowding on the 7 could be attributed to riders switching from other lines

Frequent riders by line when asked how crowding changed.

Line	The bus is much less crowded	The bus is somewhat less crowded	Crowding is about the same	The bus is somewhat more crowded	The bus is much more crowded. Riders are not able to board at some stops
5 Fulton	3%	3%	26%	23%	45%
5R Fulton Rapid	0%	3%	16%	21%	59%
6 Hayes-Parnassus	6%	12%	45%	28%	10%
7 Haight-Noriega	0%	3%	20%	33%	43%
9 San Bruno	2%	2%	45%	27%	25%
9R San Bruno Rapid	0%	0%	43%	24%	33%
31 Balboa	3%	5%	46%	23%	23%

#### 6 Hayes - Parnassus

6 Hayes-Parnassus frequent riders when asked how the new line changed their travel times

	Count	Percentage
Don't know / not sure	14	9%
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Increased less than 5 minutes	13	8%
Increased by 5-10 minutes	22	14%
Increased by 10-15 minutes	29	18%
Increased by 15-30 minutes	19	12%
Increased by more than 30 minutes	4	3%
No change	57	36%

- Reactions to the new 6 Hayes –
   Parnassus line were mixed
- A third of riders thought it was better than expected, a third thought it met their expectations, and 25% thought it was worse. The rest weren't sure
- Half of these riders said it was convenient
- Many riders indicated it increased their travel times. There was no answer available to say it decreased their travel time

#### **Notification**

Medium	Respondents	Percent
Poster at a Muni stop	556	68%
Announcement on Muni	220	27%
On or after June 21, when I took the bus	191	23%
SFMTA.com	125	15%
Digital display at a stop	110	13%
Newsletter article	92	11%
Community-based organization	84	10%
Instagram	72	9%
Staff at a stop or on a bus	63	8%
TV news	51	6%
None of the above	39	5%
Don't know / not sure	34	4%
Newspaper ad	31	4%
Meeting	28	3%
TikTok	21	3%
Elected official	20	2%
X (formerly Twitter)	18	2%
Radio news	14	2%
Digital ad	13	2%
BlueSky	12	1%
YouTube	10	1%

Of 818 responses, only 34 indicated they heard about the change in a language other than English.

- Most respondents learned about the change from posters, onboard audio, or simply riding the bus after 6/21
- Audio announcements were lengthy, but they proved effective
- Other notification tools were less effective

## **Sentiment Analysis**

Respondents had four opportunities to provide direct feedback:

- "Why did you describe your overall experience this way?"
- "Why did you describe your transfer experience this way?"
- "What feedback do you have about the new 6 Hayes-Parnassus route?"
- "What feedback do you have about the information you received on this change?"

Frequent Suggestions	<b>Supporting Entries</b>
Restore direct routes to downtown	170
Increase bus frequency	66
Improve transfer coordination	93
Enhance safety at transfer points	16
Provide clearer signage and communication	74
Consider equity impacts	
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- Sentiment analysis used key words and topic modeling to identify common themes, suggestions, and assign a sentiment score.
- Overall sentiment and feedback keywords trended negative
- Riders expressed frustration, dissatisfaction with the changes, and feelings of inconvenience
- Themes similar across all questions

#### Sentiment Analysis - Transfers

Feedback and themes related specifically to transfers:

- Loss of single seat rides
- Added walking distance
- Unreliable connections, transfers are stressful and unpredictable
- Lack of clear signage at transfer points and inconsistent information
- Safety concerns about transfer points, especially at night
- Suggestions include more frequency, more signage and maps, online "how to transfer" resources, and lengthening routes to hit more central transfer points like Powell

# Demographics

Race	Count	Percentage
Asian and/or Pacific Islander	147	18%
Black and/or African American	34	4%
Hispanic and/or Latinx	93	11%
Middle Eastern and/or North African	13	2%
Native American	13	2%
White	414	51%
Another race or ethnicity	14	2%
Don't know/not sure	8	1%
Prefer not to answer	62	8%

Gender	Count	Percentage
Female	383	51%
Male	295	39%
Transgender	10	1%
Gender Non-Binary	19	3%
Another Gender	3	0%
Don't know/not sure	2	0%
Prefer not to answer	36	5%

Income	Count	Percentage
Less than \$10,000	41	6%
\$10,000 to \$24,999	47	7%
\$25,000 to \$49,999	62	9%
\$50,000 to \$74,999	84	12%
\$75,000 to \$99,999	70	10%
\$100,000 to \$124,999	76	11%
\$125,000 to \$149,999	39	5%
\$150,000 to \$174,999	28	4%
\$175,000 to \$199,999	29	4%
\$200,000-\$299,999	53	7%

Primary Language at		
Home	Count	Percentage
English	675	85%
Cantonese	19	2%
Mandarin	8	1%
Spanish	40	5%
Filipino and/or Tagalog	8	1%
Russian	6	1%
Vietnamese	4	0%
Another language	22	3%
Don't know/not sure	2	0%
Prefer not to answer	12	2%

#### **Lessons Learned**

#### **Service Changes**

- Physical media reaches the most riders
- Continue to focus on improving outreach in languages other than English

#### Surveys

- Ask fewer, richer questions
- Structure questions for easier analysis
- Design survey to get less constrained feedback

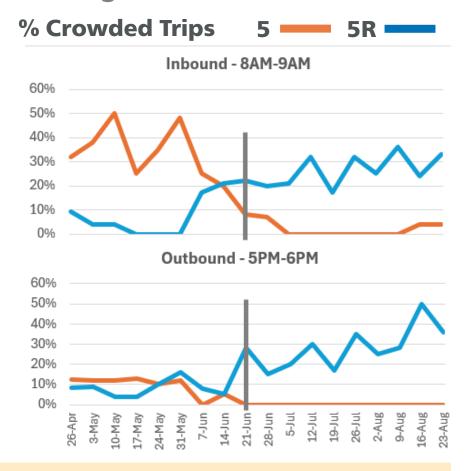
# Responding to Feedback 5R Fulton Rapid Post-June Crowding

#### **Crowding Data**

- Demand has shifted from the local to rapid route
- Crowding increased on rapid, decreased on local

#### **Intercept Survey & Customer Feedback**

- 71% of 5 Fulton respondents and
   80% of 5R Fulton Rapid respondents said the bus is somewhat or much more crowded
- Almost 60% of 5R Fulton Rapid respondents said riders are not able to board at some stops
- 15 overcrowding 311 feedback received



#### Recommendations

- Increase frequencies during the peaks
- When extra operators are available, provide additional trips

## Questions?

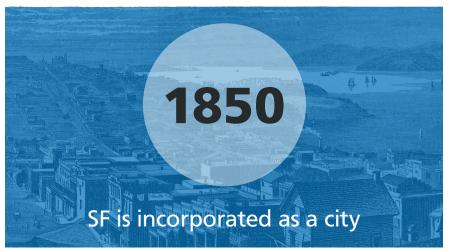
# SFMTA's Budget Outlook

#### Transit is critical to San Francisco's vitality



- Muni serves over 500,000 riders every day
- Approximately 27% of SFUSD students, roughly 14,000, take Muni to get to and from school
- Muni accounts for almost 50% of transit ridership across the nine-county bay area region.

#### Muni is core to San Francisco's identity





1912

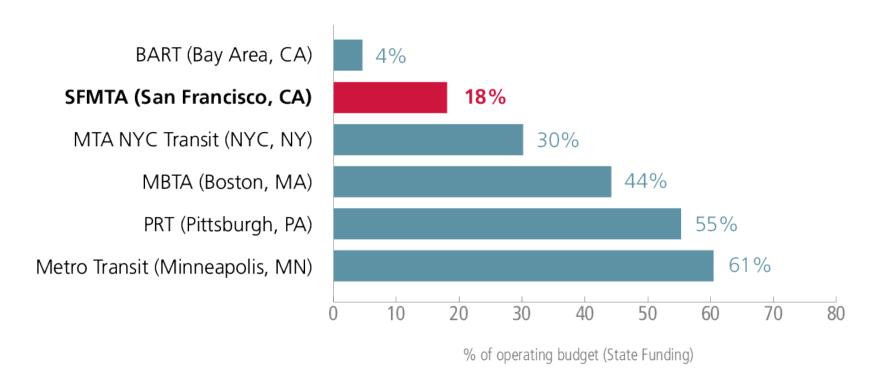
The City takes over the private rail lines as they go bankrupt, creating the "Municipal Railway." Affordable, space-efficient transportation is not free-market-supported

1973

SF passes the "Transit First" policy, establishing transit as the preferred mode of travel in the City

#### Transit only works with local support

State funding as a percentage of operating expenditures, selected US transit agencies (2023 NTD Reporting Year)

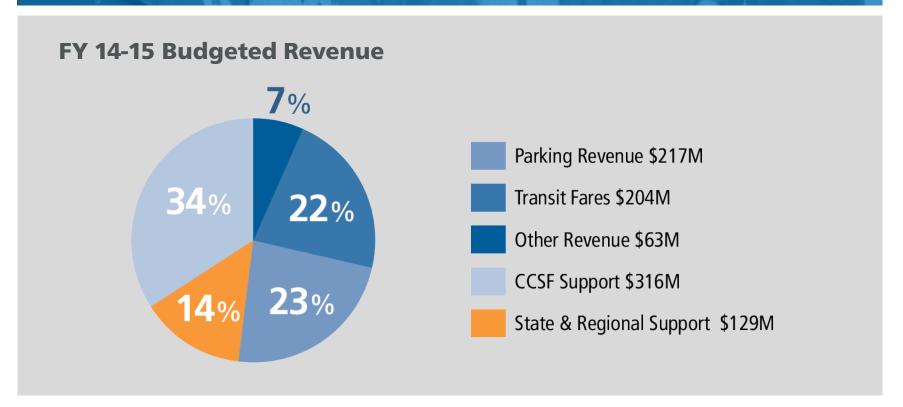


Source: 2022 - 2023 NTD Annual Data - Funding Sources. Includes operating budget for transit services.

#### So we funded Muni locally

1999

Voters pass Prop E, which diversifies transit funding and ties it to the City's broader economy



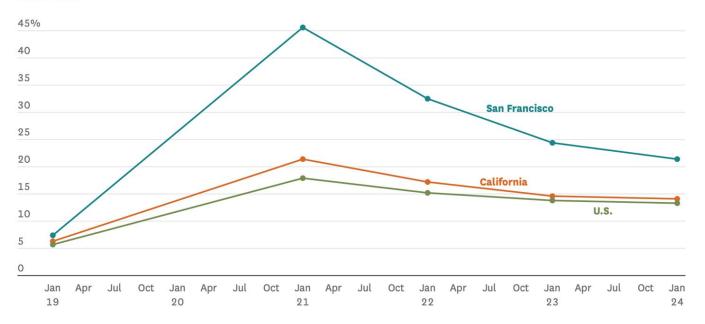
Source: FY14-15 Original Budget, passed by Board of Supervisors July 2014. Parking tax reflected as CCSF revenue source.

#### Until the world changed

2025

Work from home changed travel patterns, disrupting our funding framework

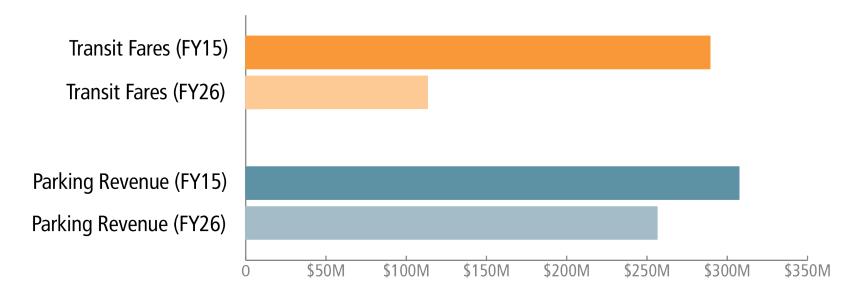
#### How San Francisco work from home rates compare to the rest of the state and the U.S.



Source: SF Chronicle

#### The old approach to funding is not enough

## Budgeted Parking and Fare Revenues Over Time (in CY Dollars)



(the FY15 figures have been adjusted to current year dollars)

# We're not alone – other transit agencies are facing huge deficits



SEPTA in Philadelphia, Pennsylvania is facing a **\$200 million** annual shortfall.



TriMet in Portland, Ore. is looking at a \$300 million deficit.



Chicago area transit agencies, including the "L" service, are staring down a deficit of nearly **\$800 million** that could result in up to 40 percent of service to be cut.

#### Muni has been adapting

**Increased Revenues Projected Revenues Approximately \$13M** year Projected **\$18M** increase in **FY26** over year actual transit revenue from parking revenue growth from FY24 to FY25 optimization

#### Muni has been adapting

#### **Demonstrated Fiscal Discipline**

**\$120M**/year personnel savings through a hiring freeze, consolidating functions, and reducing management.

#### **Surgical Service Reductions**

**\$7M** saved through summer 2025 service adjustments, but no route eliminations.

#### **Investments that Pay for Themselves**

**\$10M** annual savings starting FY25 thanks to transit priority and reliability upgrades.





# Without new funding, SFMTA will need to severely cut Muni service



What reduction in Muni service could look like:

- Suspend Muni lines with lower ridership: Remove entire routes from the system.
- Reduce schedule frequences up to 50%: Your wait time doubles.
- Scale late-night service way
   back: Consider an evening
   transit curfew.
- Eliminate or reduce Muni fare discounts: Free Muni for Youth, Low-Income discounts

#### We need long-term solutions

The Muni Funding Working Group overwhelmingly supported *the following approach:* 

- No Service Cuts
- Further administrative efficiencies that identify on-going cost savings
- A regional sales revenue measure
- A local revenue measure

	Package Name	% Top Choice
Α	Preserve Muni & Street Safety – Big at the Ballot in 2026	69%
В	Preserve Muni & Street Safety – Multiple Ballots over Time	19%
С	Protecting Muni Service – Minimizing Cuts for Riders	6%
D	Finding Revenues through Parking	6%
Е	Cuts Due to Less Opportunity at the Ballot	0%
F	Fewer Options, More Cuts	0%

# A sustainable approach is needed that balances revenue and expenditures

Cost Reductions/Efficiencies: Reducing expenditures across all divisions and implementing efficiency improvements on an ongoing basis.

Regional Revenue Measure: The Connect Bay Area Act allows San Francisco to pursue a full one-cent sales tax increase to maintain Muni. If passed by voters, we expect Muni to receive ~\$160M per year to address the structural deficit.

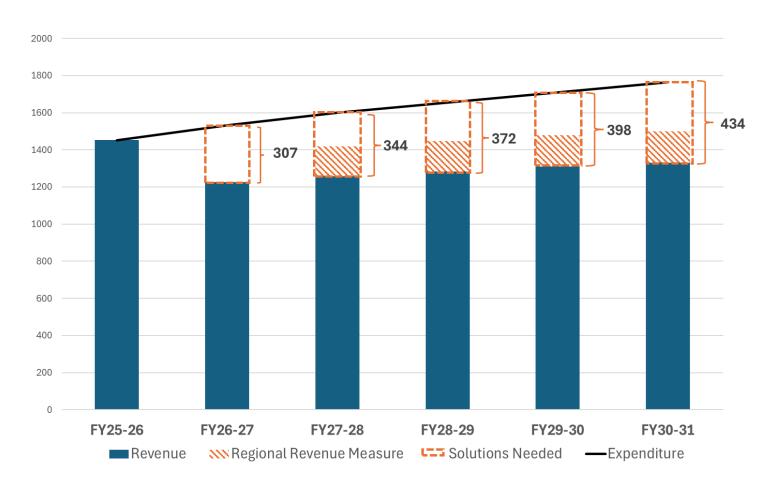
Local Revenue Measure: Seeing that the regional measure will not fully provide the revenue needed to maintain Muni service, a local parcel tax is needed to close the gap.

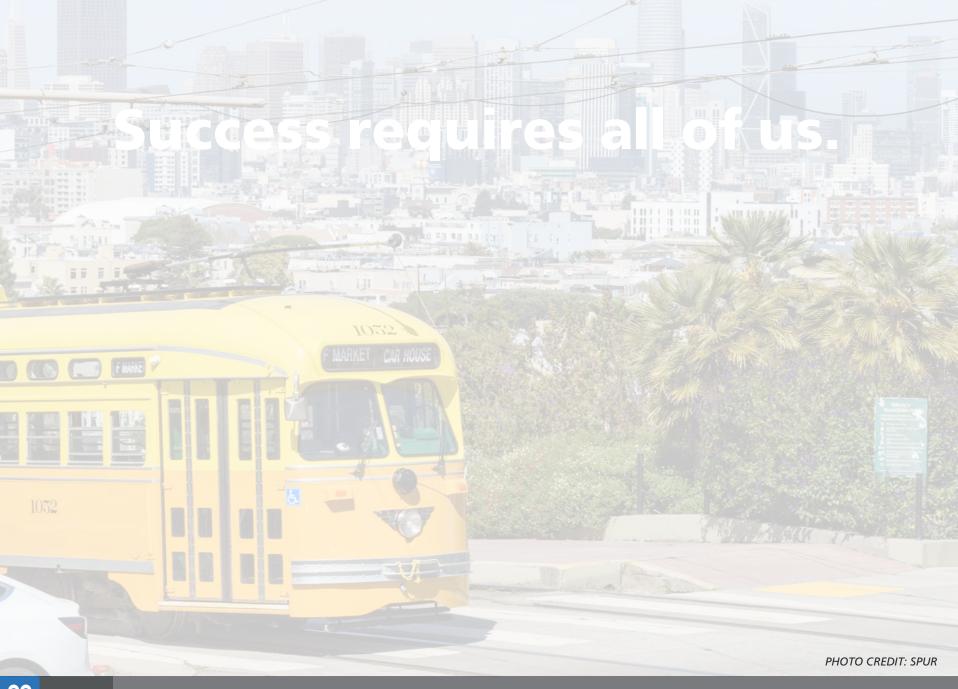


**One-time Sources:** There is a need to identify one-time funding sources to bridge to the revenue measures.

#### A local revenue measure is critical

Regional revenue measure will help resolve some of the deficit in the out years as well as additional self-help measures





# Muni Equity Strategy Update

#### **Muni Equity Strategy Update**

- SFMTA's Muni
   Service Equity Policy
   requires Equity
   Strategy Update
   every two years
   ahead of the two year budget cycle
- Working on update for upcoming Budget Cycle
- Will continue to work on Systemwide Service Evaluation work



# Muni Equity Strategy & Systemwide Service Evaluation Work

#### **Fall/Winter**

- Collect feedback on defining transit service need
- Collect feedback route-level and systemwide transit performance & service needs
- Establish policy for prioritizing service needs
- Review draft Muni Equity
   Strategy Update

#### **Spring**

- Seek SFMTA Board approval on final Muni Equity Strategy for FY26-27 & FY27-28 budget
- Budget will be presented to the mayor by May 1

#### **Updated Evaluation:**

Further operationalize Muni Service Equity Policy by incorporating route-level and system-level needs.

# Evaluate performance Identify gaps between current & target performance/service Develop recommendations to address gaps

**Prioritize recommendations** 

# 2025 Title VI Program Update



SFMTA Board of Directors Meeting November 4, 2025

#### Overview

- As a public transit agency that receives federal funds from the U.S. Department of Transportation (DOT) through the Federal Transit Administration (FTA), the San Francisco Municipal Transportation Agency (SFMTA) is required to uphold Title VI of the Civil Rights Act of 1964.
- Under Title VI, federally funded agencies cannot deny the benefits of, or participation in, programs or activities that receive Federal financial assistance on the basis of race, color or national origin.
  - The SFMTA assesses the needs of its customers who have limited ability to read, speak, write or understand English to ensure our programs and services are accessible.
  - The effects of our programs on communities with limited income is also taken into account.

### 2025 Title VI Program Update

- Title VI compliance is monitored by the Federal Transit Administration (FTA)
- Program Updates are due every three years as required by FTA Circular 4702.1B
- Updates include both General Program and Transit-Specific Requirements, as detailed in the Circular
- The 2025 Title VI Program Update must be reviewed and approved by MTAB and submitted to the FTA by December 1, 2025

## General Program Requirements

- Title VI Notice to the Public
- Title VI Complaint Procedures
- Public Participation Plan
- Language Assistance Plan
- Membership of Non-elected Committees and Councils

# Notice to the Public and Title VI Complaint Procedures

- SFMTA Website
- SFMTA Offices and Public Access Areas
- Vehicles and Transit
   Stations
- Public Information Materials
- Foldable Transit Maps

#### TITLE VI

The SFMTA, which runs Muni, does not discriminate on the basis of race, color or national origin. For more information or to file a complaint, visit SFMTA.com or contact 311.

La SFMTA, administradora de Muni, no discrimina por motivos de raza, color u origen nacional. Para más información o para presentar una queja, visite SFMTA.com o llame al 311.

Агенство SFMTA, управляющее работой транспортной системы Милі, не дискриминирует по признаку расы, цвета кожи или национального происхождения. Для получения дополнительной информации или подачи жалобы, посетите наш сайт SFMTA.com или позвоните по телефону 311.

三藩市公車局(SFMTA)負責營運Muni,不會基於種族、廣色或原國籍而產生歧視。欲了解更多資訊或提出投訴,請瀏覽網站 SFMTA.com 或聯絡311。

Cơ quan Giao thông Vận tải Thành phố San Francisco (SFMTA), đơn vị điều hành địch vụ Muni, không phân biệt đối xử dựa trên chúng tộc, màu da hoặc nguồn gốc quốc gia. Để biết thêm thông tin hoặc nộp đơn khiếu nại, hãy truy cập trang mạng SFMTA.com hoặc liên hệ tổng đải 311.

MUNI를 운행하는 SFMTA는 인종, 색깔 또는 국격에 기반하여 차 별을 하지 않습니다. 더 많은 경보가 필요하시거나 불만을 접수하시 려면, SFMTA.com를 방문하시거나 311에 연락을 주십시오.

L'office municipal des transports de San Francisco (SFMTA) qui gère Muni, ne fait aucune discrimination sur la base de la race, de la couleur ou de l'origine nationale. Pour plus d'informations ou pour déposer une plainte, visitez le site SFMTA.com ou contactez le 311.

Muniを運営するSFMTAは、人種や出身国で差別はしません。詳細情報または苦情についてはSFMTA.comまで問い合わせるか311までご連絡ください。

Ang SFMTA, na nagpapatakbo ng Muni, ay hindi nagdidiskrimina batay sa lahi, kulay ng balat o bansang pinagmulan. Para sa higit pang impormasyon o upang maghain ng reklamo, bisitahin ang SFMTA.com o tumawag sa 311.

SFMTA ซึ่งเป็นผู้ให้บริการ Muni ไม่เดือกปฏิบัติบนพื้นฐานของเชื้อ ชาติ ดีผิว หรือแหล่งกำเนิก สำหรับข้อมูลเพิ่มเติมหรือหากล้องการปืน เรื่องร้องเรียน โปรกไปที่ SFMTA.COM หรือติกต่อ 311.

تمتع هيئة الظل البلدية بمنينة سان فر انسيسكو SFMTA ، فقي تدير وسائل فقال فعام والسكك المعنيد. بالبلدية هيئة الطلاق المتبير على السفر تحري أو القرن أو الأصل القومي لمزيد من المعلومات أو للقديم لك عن تعتبر با عن ASMATA فعراق أسسا ب في 2011

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#### Language Access and Public Participation

- Language Assistance Plan (LAP)
  - How we assess and meet the needs of our limited-English proficient (LEP) communities within our service area and what language access tools are preferred for communication
  - Limited English Proficient (LEP) persons refers to those for whom English is not their primary language and who have a limited ability to read, write, speak, or understand English. It includes people who reported to the U.S. Census that they speak English less than very well, not well, or not at all.
- Public Participation Plan (PPP)
  - Details the tools and methodologies we use to engage community partners and riders early and continuously in our decision-making processes, preferred meeting topics and venues and how participants prefer to provide feedback

#### PPP and LAP Data Collection Efforts

- Public Engagement and Language Assistance Survey in 10 languages (over 7,300 collected)
  - Promoted via SFMTA.com, text and email blasts, CBO partnerships, Community Conversations, social media, intercept surveys
- CBO Leadership Interviews (35)
- Community Conversations (9)
  - Includes sessions conducted in Spanish, Cantonese, Filipino and Vietnamese
- Other data sources: analysis of Language Line data,
   Census and school data, paratransit application information



# Preliminary Insights from CBO Leadership Interviews and Community Conversations

- Muni continues to be the primary mode of transportation for LEP clients and community
- Traditional information sources such as signage and information at bus stations and stops maintain significant relevance
- Aim to communicate at a 5th-grade reading level (city standard) or below to accommodate literacy rates of LEP populations
- LEP individuals rely on trusted interpersonal networks and community organizations for Muni information
- Consider increasing communications that include audio announcements, simple visual elements and icons, QR codes linking to audio or translated content and culturally adapted materials beyond direct translation
- Continue working with CBOs to improve Muni safety and increase service outreach

## Transit Provider Requirements

- Service Standards and Policies
- Demographic and Service Profile Maps and Charts, and Ridership Information
- Documentation of Public Engagement Process for Title VI Transit Policies
  - Disparate Impact,
     Disproportionate Burden,
     Major Service Change
- Fare and Service Equity Analyses from 2022-2025
- Service Performance Monitoring

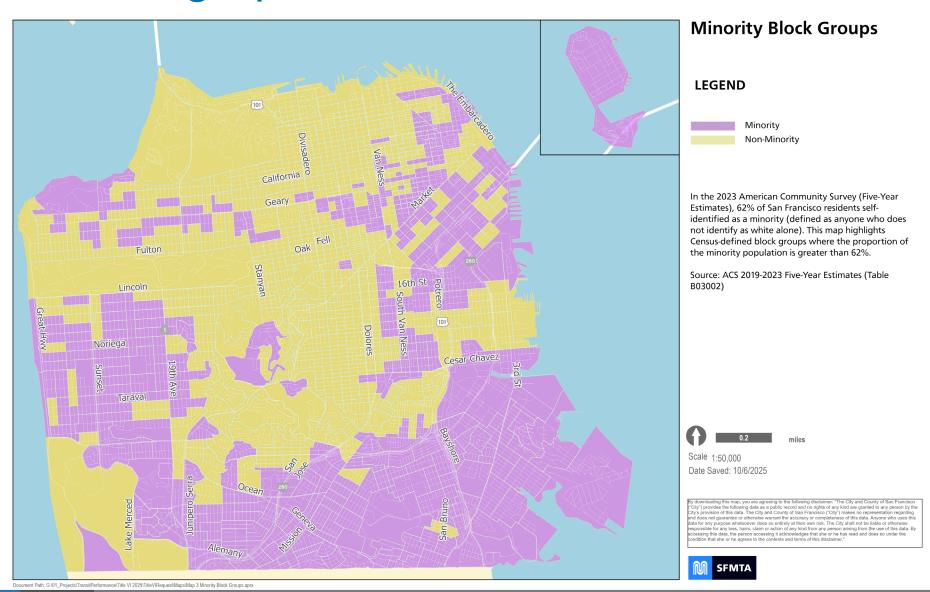


#### FTA Circular 4702.1B Definitions

As required, SFMTA incorporates the terminology and definitions in FTA Circular 4702.1B

FTA Terminology	Definition	Source
Minority Census Block Group	Census block group where proportion of residents who self-identify as any race/ethnicity other than white, not Hispanic or Latino <u>is equal</u> to or greater than the city-wide population of 62%.	ACS 2019-2023 Five-Year Estimates
<b>Minority Route</b>	Routes where ridership consists of trips made by individuals who self-identify as any race/ethnicity other than white, not Hispanic or Latino <u>at a rate higher than the systemwide average of 68%.</u>	2025 Muni Onboard Survey Data

#### Demographics of Service Area

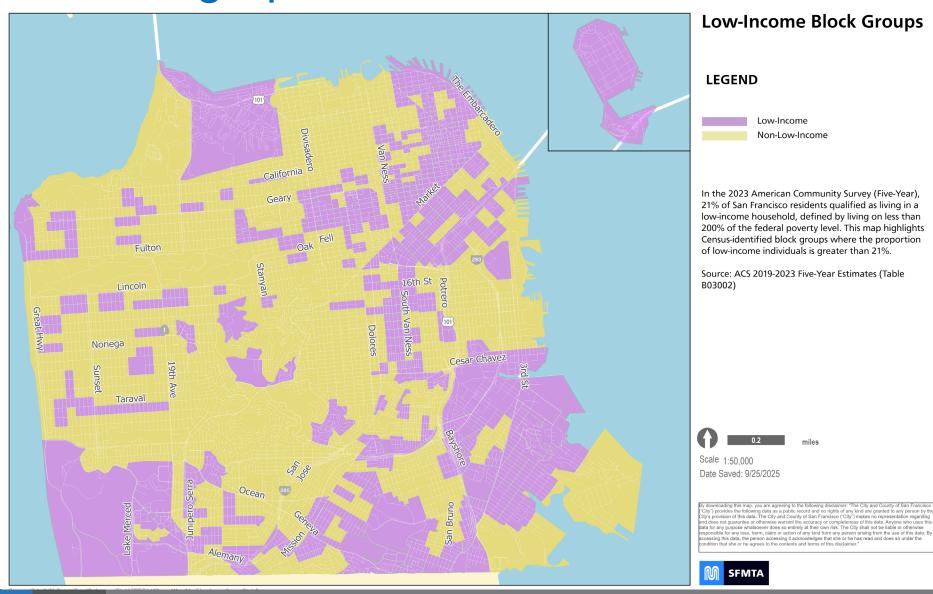


#### FTA Circular 4702.1B Definitions

As required, SFMTA incorporates the terminology and definitions in FTA Circular 4702.1B

FTA Terminology	Definition	Source
Low-Income Census Block Group	Census block group where proportion of people who live in a household whose total income is below 200% of the federal poverty level <u>is equal</u> to or greater than the city-wide population of 21%.	ACS 2019 – 2023 Five Year Estimates
Low-Income Route	Routes where ridership consists of trips made by individuals who live in a household whose total income is below 200% of the federal poverty level at a rate higher than the systemwide average of 42%.	2025 Muni Onboard Survey Data

## Demographics of Service Area



## Service Performance Monitoring

- As part of Title VI program requirements, SFMTA is required to monitor service performance of:
  - Minority routes compared to Non-Minority routes
  - Low-income routes compared to Non-Low-Income routes
- Disparate impact (based on race) or disproportionate burden (based on income levels) is found if the results between the route classifications is greater than 8%
- Monitoring based on SFMTA's Service Standards and Policies

#### **Service Standards**

<b>Standard Type</b>	Service Standard
Vehicle Load	Vehicle load at Max Load Point should not exceed planning capacity
On-Time Performance	<ul> <li>Muni Metro, Rapid &amp; Frequent Local Routes:         Less than 14% of trips with a service gap</li> <li>Grid, Circulator, Specialized, and Owl Routes:         85% on-time (schedule adherence)</li> </ul>
Policy Headways	Scheduled headway should meet the defined policy headway minimum per route service category and time period *Specialized Routes: Headways are based on service demand
Service Coverage	All residential neighborhoods within 1/4 mile of Muni stop

#### Service Policies

Policy Type	Policy Standard	
Vehicle Assignment	Assign vehicles in a manner that prevents discrimination to minority and low-income communities and considers technical criteria	
Transit Amenities	<ul> <li>Stop Markings and Flags</li> <li>Stop IDs</li> <li>Shelters and System Maps</li> <li>NextBus Display</li> </ul>	
	Station- Underground rail only	

## Service Performance Monitoring Findings

Standard/Policy Type	Disparate Impact	Disproportionate Burden
Vehicle Load	No	No
On-Time Performance	No	No
Policy Headways	No	No
Service Coverage	No	No
Vehicle Assignment	No	No
Transit Amenities	No	No

# Questions?

## **Next Meetings**

- December 2025 Meeting
  - Winter 2026 Service Changes & Potrero Closure Update
  - Continue Systemwide Evaluation Work
- January April 2026
  - Begin to meet monthly
  - Every other month will switch between the Agency's Budget and Systemwide Service Evaluation