



**SFMTA**



# San Francisco Municipal Transportation Agency **Fiscal Conditions Update**

SamTrans Board of Directors  
July 2, 2025

# A well-functioning Muni is critical to the Bay Area's economic recovery

- Muni supports the climate, equity and economic recovery goals of the entire region
- Muni carries **over half** of Bay Area transit riders. We provided 158 million passenger trips in 2024
- Almost half of all Bay Area interagency transit transfers are to or from Muni

**“If we don’t have a solvent transit agency, we will never have economic recovery.” – Ted Egan, San Francisco’s Chief Economist**



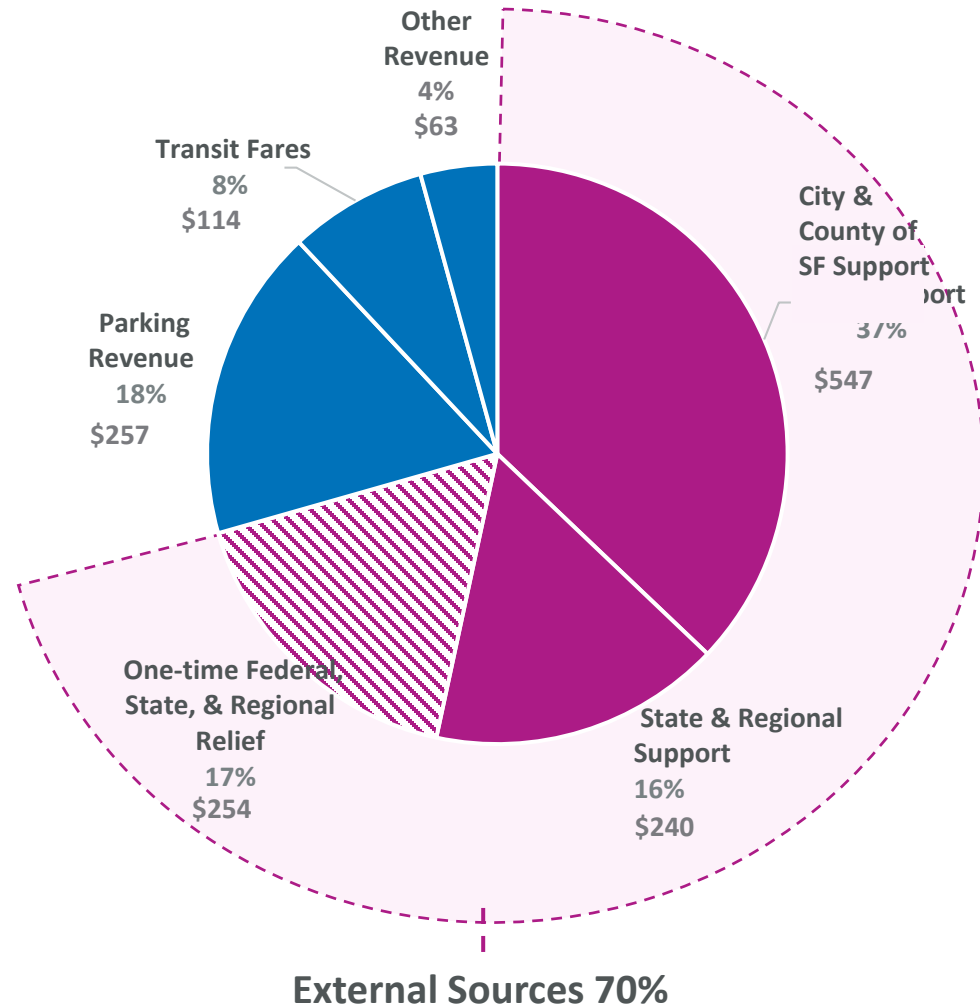
# Operating Budget Revenue

■ **30% revenue generated by the SFMTA:**  
Transit Fares, Parking Revenue, Other Revenue, and Fund Balance.

■ **70% revenue from external sources:**  
City & County of SF Support, State & Regional Support, and One-time Federal, State, & Regional Relief.

▨ **17% Expiring FY26-27:**  
One-time Federal, State, & Regional Relief fully expended by June 2026.

FY 25-26 Budgeted Revenue



Source: FY25-26 Original Budget, passed by Board of Supervisors July 2024.



# Investments in Muni service quality are paying off



TRANSIT INFRASTRUCTURE



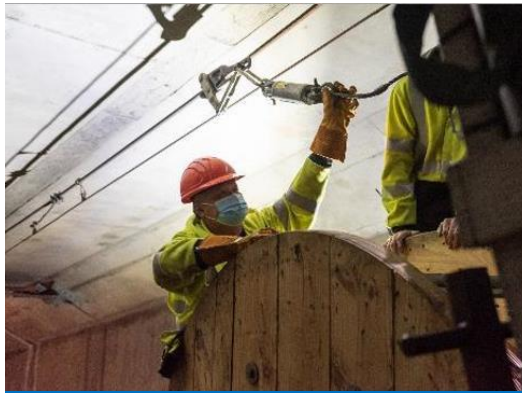
SAFETY



CUSTOMER INFORMATION



CLEANLINESS



MAINTENANCE



EMPLOYEE MENTORING

# Self Help: Generating More Revenue & Lowering Costs

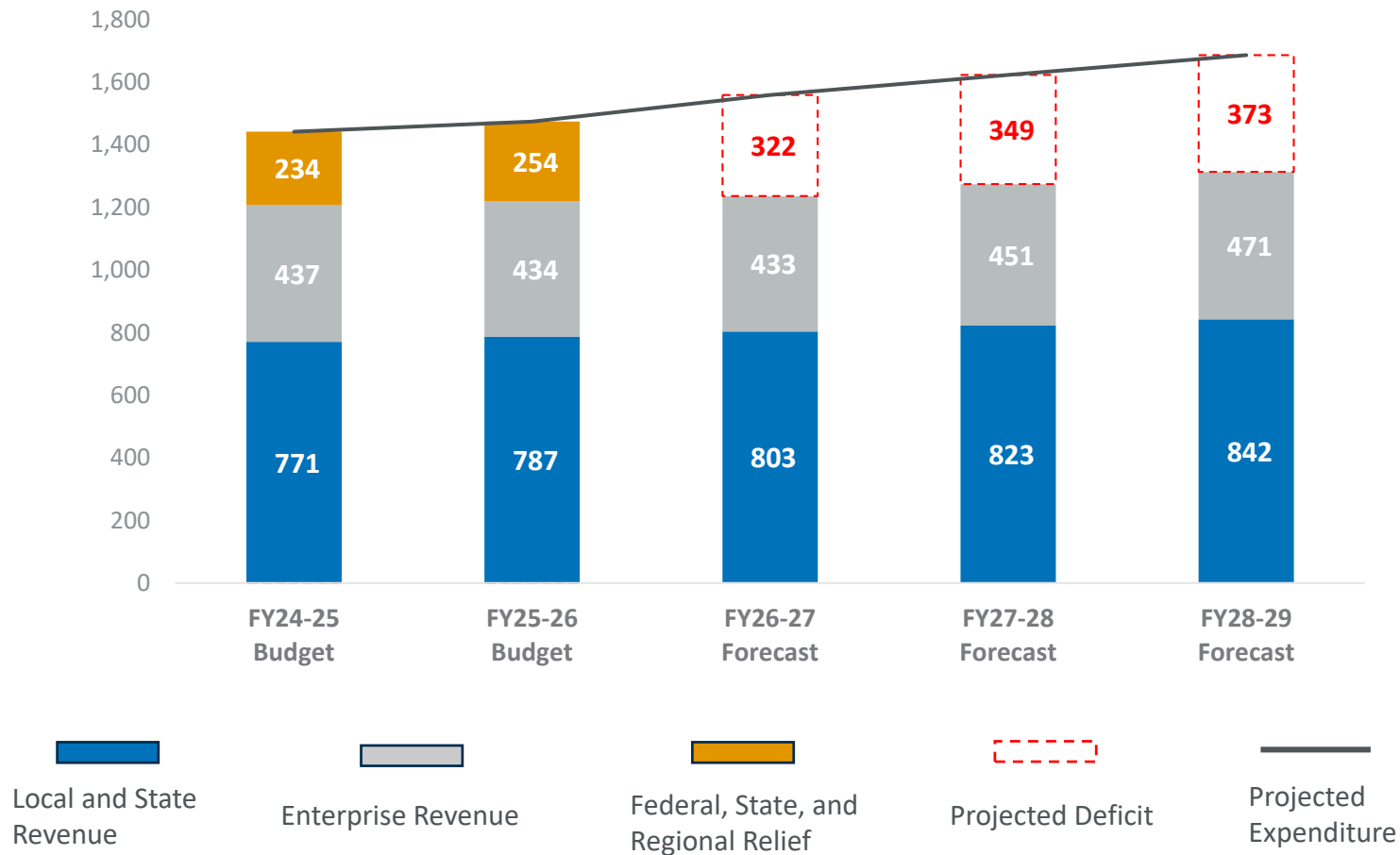
**By both cutting spending  
*and* becoming more  
efficient, we reduced the  
FY26-27 budget gap by  
\$120M.**

- Grew Muni ridership
- Increased Muni fare compliance
- Increased fares, fees and fines
- Optimizing existing parking programs to increase revenue
- Saved costs by reducing hiring and holding positions vacant
- Offering a dozen fewer Muni routes than pre-pandemic
- Cut Muni service by 2% in June 2025

# Deficit

The projected deficit is \$322M in FY26-27 and grows with inflation over time

Operating Source by Type (\$M)



# SFMTA Budget Strategy

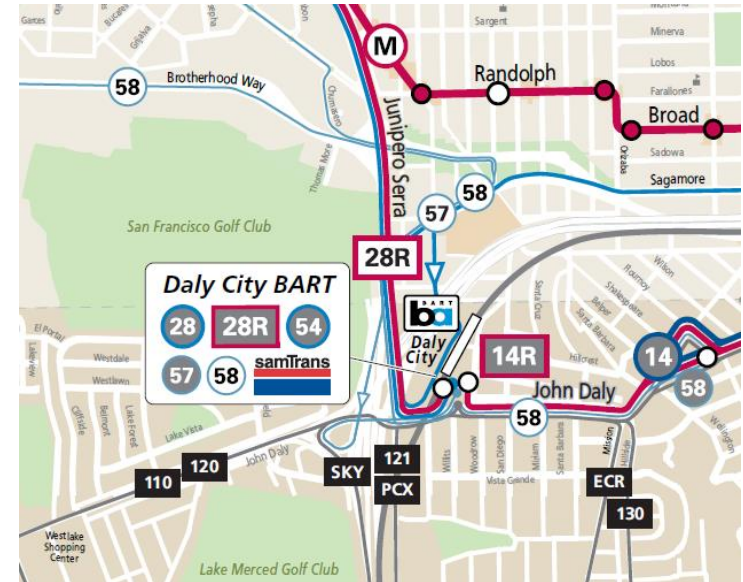
- **Muni Funding Working Group** helped build local consensus
- Closing the funding gap is going to take a variety of funding sources including additional administrative efficiencies
- Pursuing **regional revenue measure** for 2026 with regional and state partners
- Pursuing **local revenue measure** for 2026
- Will develop a **fiscally responsible FY 26-27 and FY 27-28 budget**





# How Muni Serves San Mateo County

- San Mateo County served by **eleven Muni Routes** – 8, 8AX, 9, 9R, 14, 14R, 28, 28R, 54, 57, and 58
- Many of these routes operate every **8-12 minutes** in the AM peak
- On average, a Muni bus enters or leaves San Mateo County **every 40 seconds**
- Muni working with SamTrans, BART, Caltrain and others to improve **regional coordination**





# Muni connects San Mateo County to key destinations

Where Riders Board - Stop Area	% of SM Total Routes	
Daly City BART station	57%	28, 28R, 54, 57, 58
Mission St (Daly City)	32%	14, 14R
Geneva Ave and Schwerin St (Daly City)	11%	8, 8AX, 9, 9R

Route	Average daily boardings (Sept 2024)	AM Peak Frequency (mins)	Key destinations
14 and 14 Rapid – Mission	3,600	10	Mission District, Downtown SF
28 and 28 Rapid – 19 <sup>th</sup> Ave	2,700	12	SF State, Golden Gate Park, Golden Gate Bridge, Fisherman's Wharf
9 and 9 Rapid – San Bruno	500	12	City College of SF, Downtown SF
8 and 8A Express – Bayshore	400	8	Downtown SF, Potrero Hill
Others	500	20-30	Parkmerced, Stonestown Mall, Outer Mission
Grand Total	7,700		

# Muni carries about 10% of San Mateo County transit boardings

Transit operator	Average daily boardings (weekdays, September 2024)
SamTrans (systemwide)	40,200
Caltrain (in San Mateo County)	9,000
BART (in San Mateo County)	20,500
<b>Muni (in San Mateo County)</b>	<b>7,700</b>
Grand Total	77,300

*Source – Samtrans, BART*

*Source – Caltrain*

# Thank you! Questions?

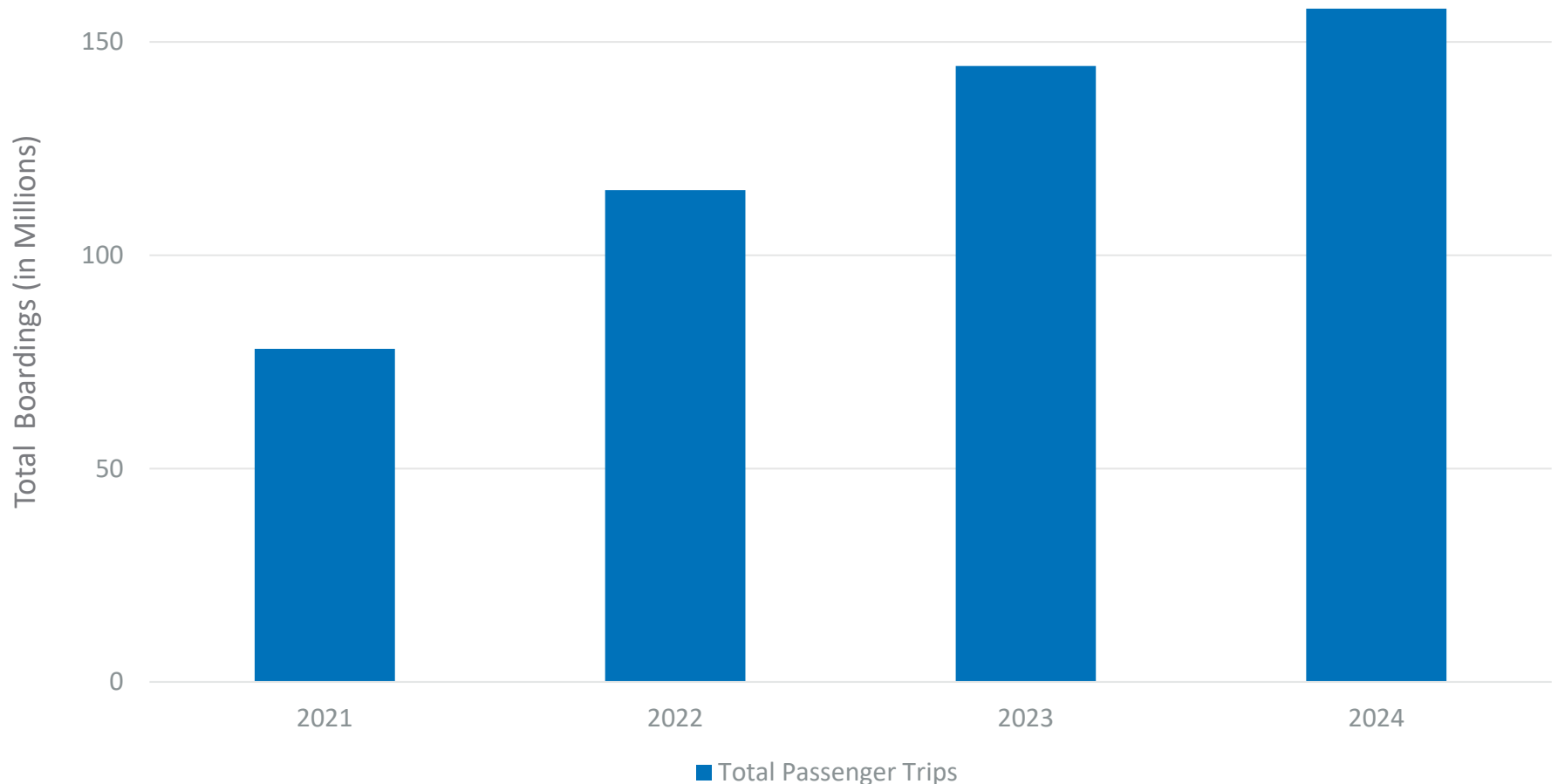


# APPENDIX



# 2024 Passenger Trips

**Muni delivered 158 million passenger trips in 2024, 13.5 million more than in 2023.**



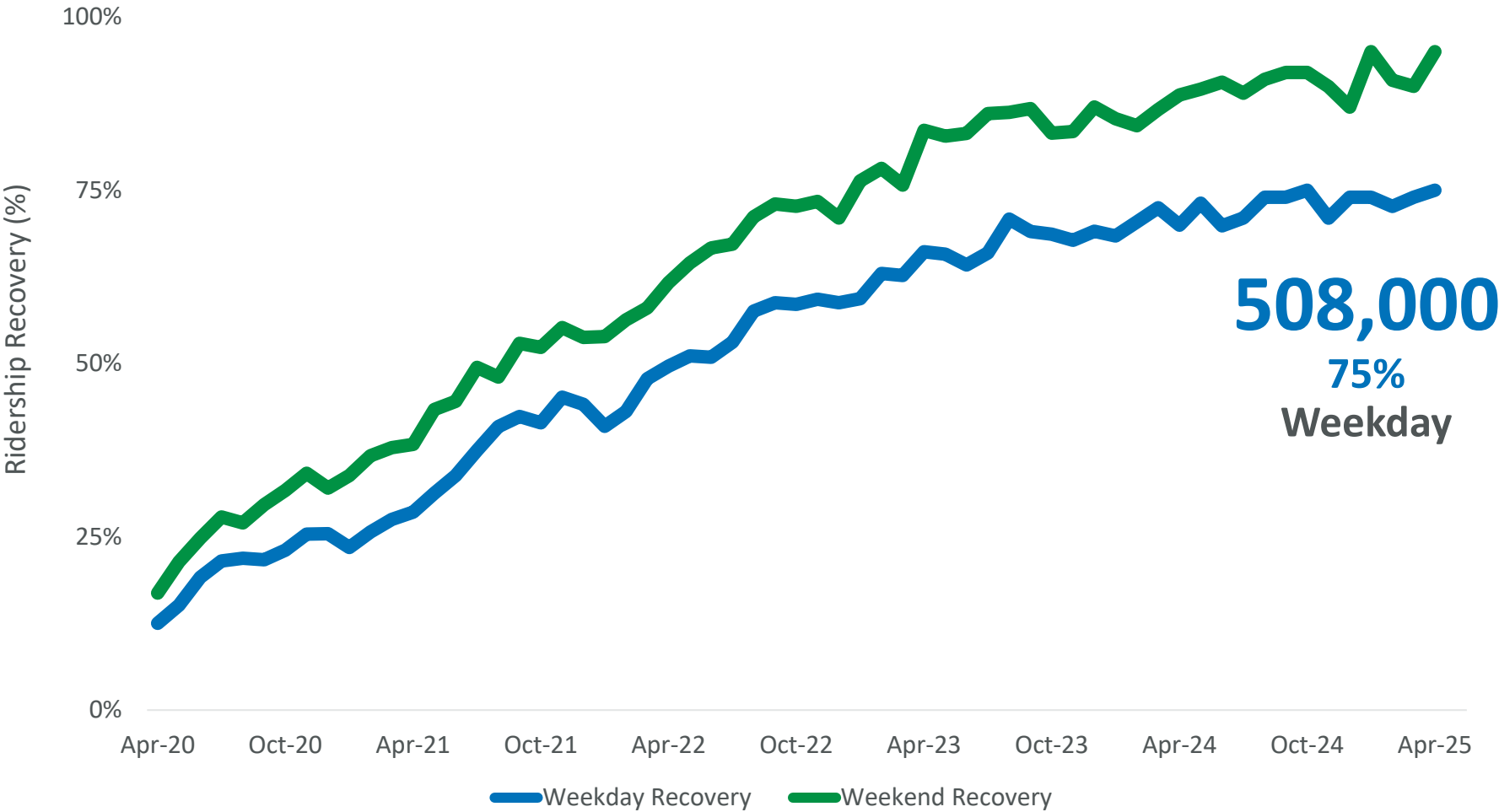
Data excludes ridership for cable cars and historic streetcars.

# April Muni Ridership

354,000

95%

Weekend



Note: Excludes cable car and streetcar. Recovery baselined against average daily boardings from the same month in calendar year 2019.

# In 2024, Muni riders gave us their highest satisfaction rating in 20 years

---

## Customer commendations

---

Great customer service!

---

Great job, especially serving disabled and wheelchair passengers.

---

Cable car operator: He's quietly one of the greatest ambassadors for the city.

---

Great, timely, friendly service!

---

Driver is always friendly, kind, and considerate

---

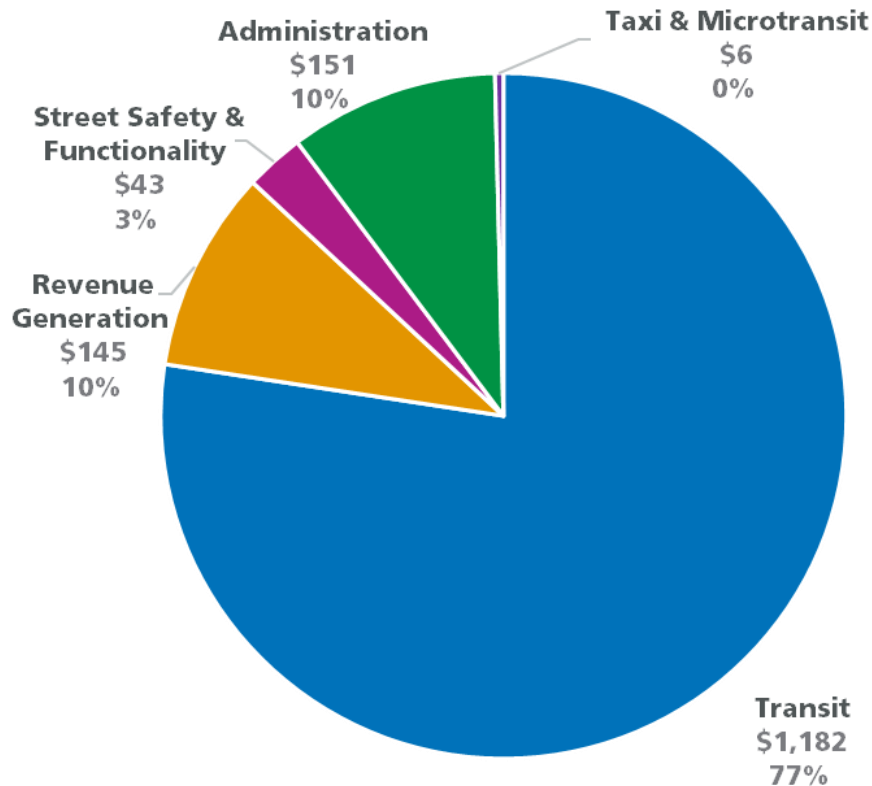
Did his job with kindness and respect.

---



# Expenditure by Services

FY 25-26 Expenditure Budget by Service (\$M)



Source: FY24-25 and FY25-26 Original Budget, passed by Board of Supervisors July 2024.  
Note: Transit includes paratransit.

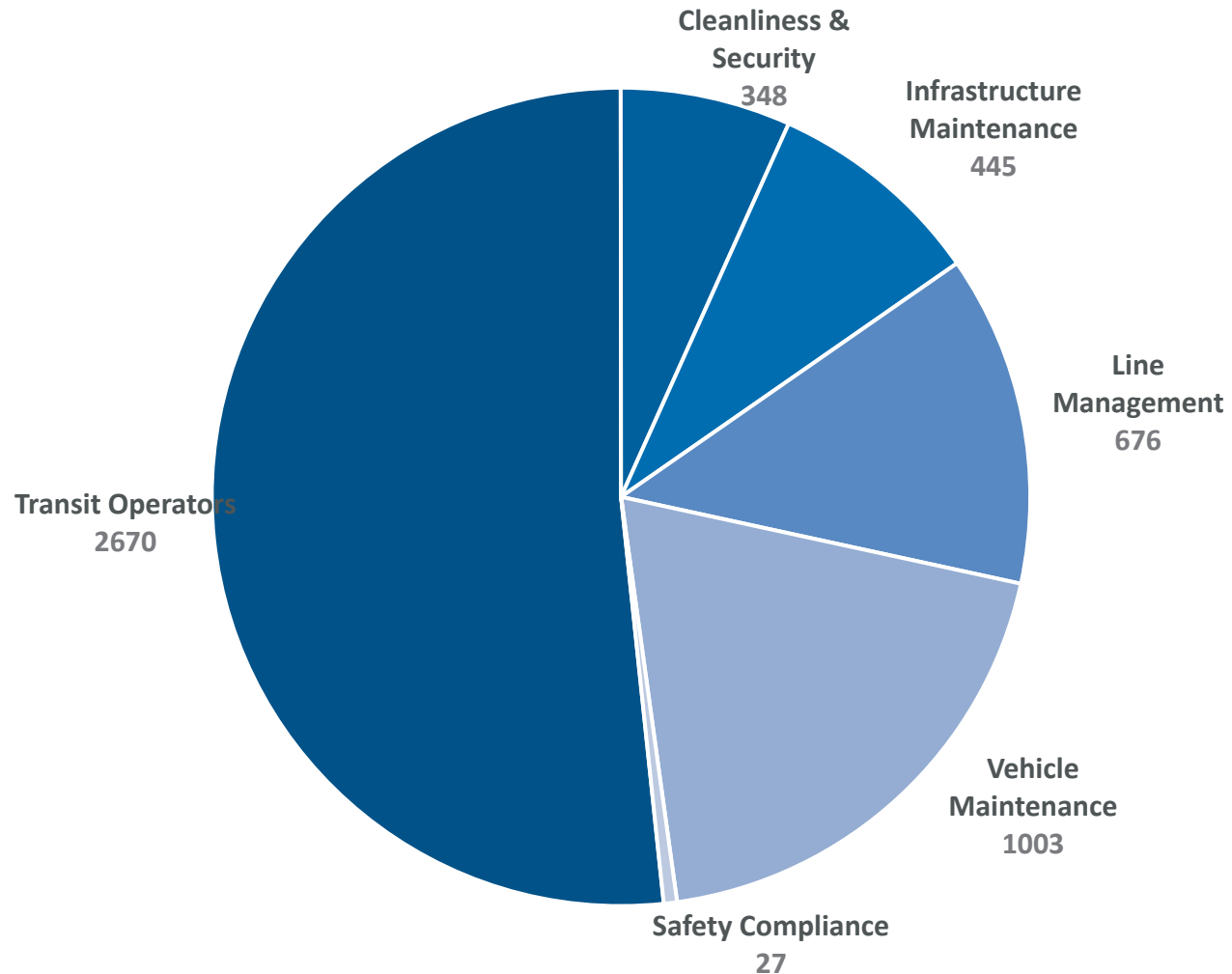
- Almost 90 percent of the SFMTA expenditures are directly related to delivering Muni service or generating revenue to support Muni service
- Most of street safety work is delivered through capital funding sources, including competitive regional and state grants
- Administration costs are small and deliver key functions, such as hiring, payroll, grant administration, workers comp, contracts and compliance



# Labor: Transit

## FY25-26 Budgeted Transit FTEs

Delivering transit  
requires more  
than transit  
operators.

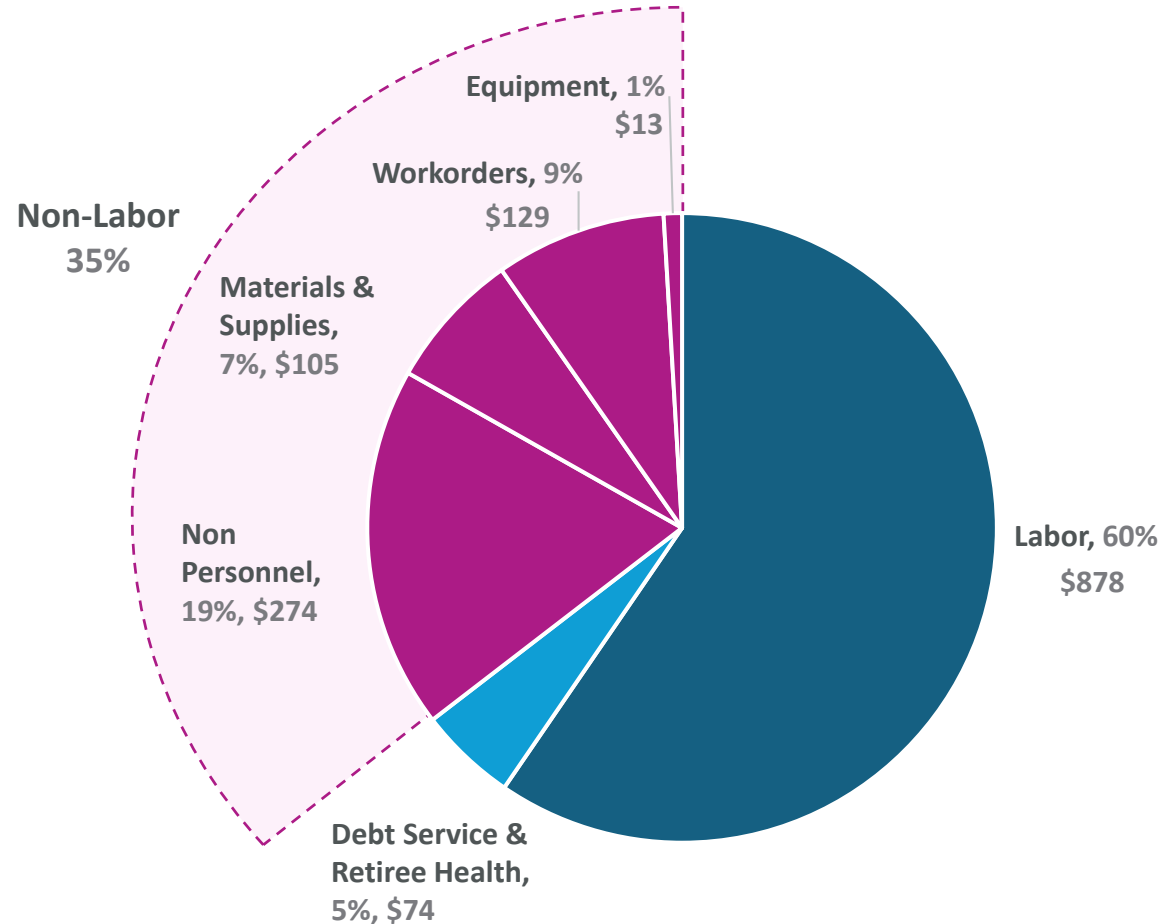


Source: FY25-26 Original Budget, passed by Board of Supervisors July 2024. Note: Excludes attrition and temporary staff. Transit includes paratransit.

# Operating Budget Expenditure

FY 25-26 Budgeted Expenditure  
by Expenditure Type

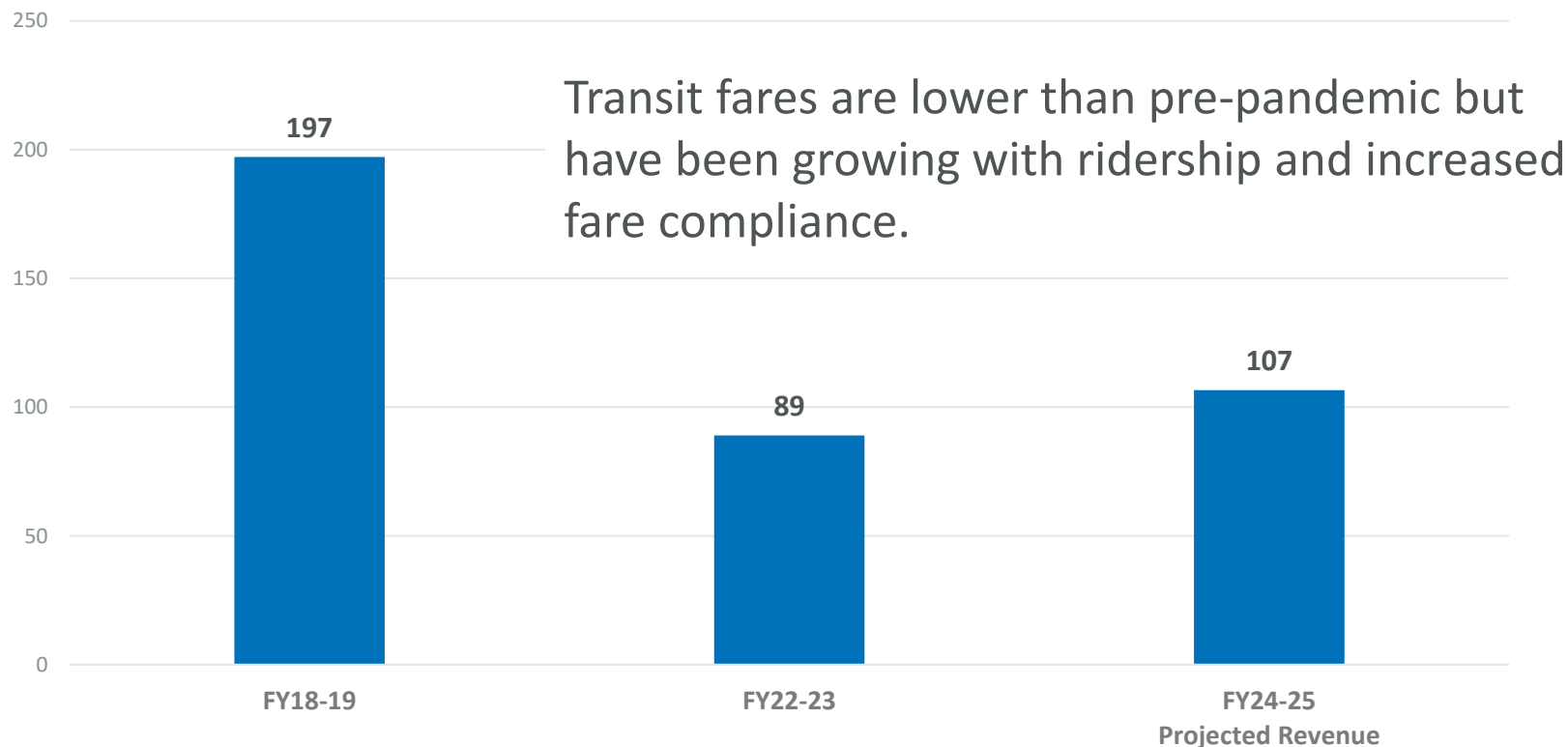
- 60%** of budget is expended on salaries and benefits for staff.
- 35%** of budget is expended on non-labor, the services and supplies staff use to do their job.
- 5%** of budget is expended on debt service and retiree health, contractual obligations that cannot be changed.



Source: FY25-26 Original Budget, passed by Board of Supervisors July 2024

# Transit Fares

## Transit Fare Revenues (Actuals/Projected \$M)



Source: FY24-25 projected revenue based on April 2025 9-month report.

Regional fare collection upgrades and continued enforcement have potential to increase transit fares, but even pre-pandemic fares are insufficient to close gap.

# Transit Fare Compliance

Addressing visible fare evasion helps build public trust in Muni. Riders have asked to see action.

The SFMTA approaches Fare Compliance with San Francisco values in mind:

- Safety
- Equity
- Education



We have stepped up our efforts and we are seeing results:

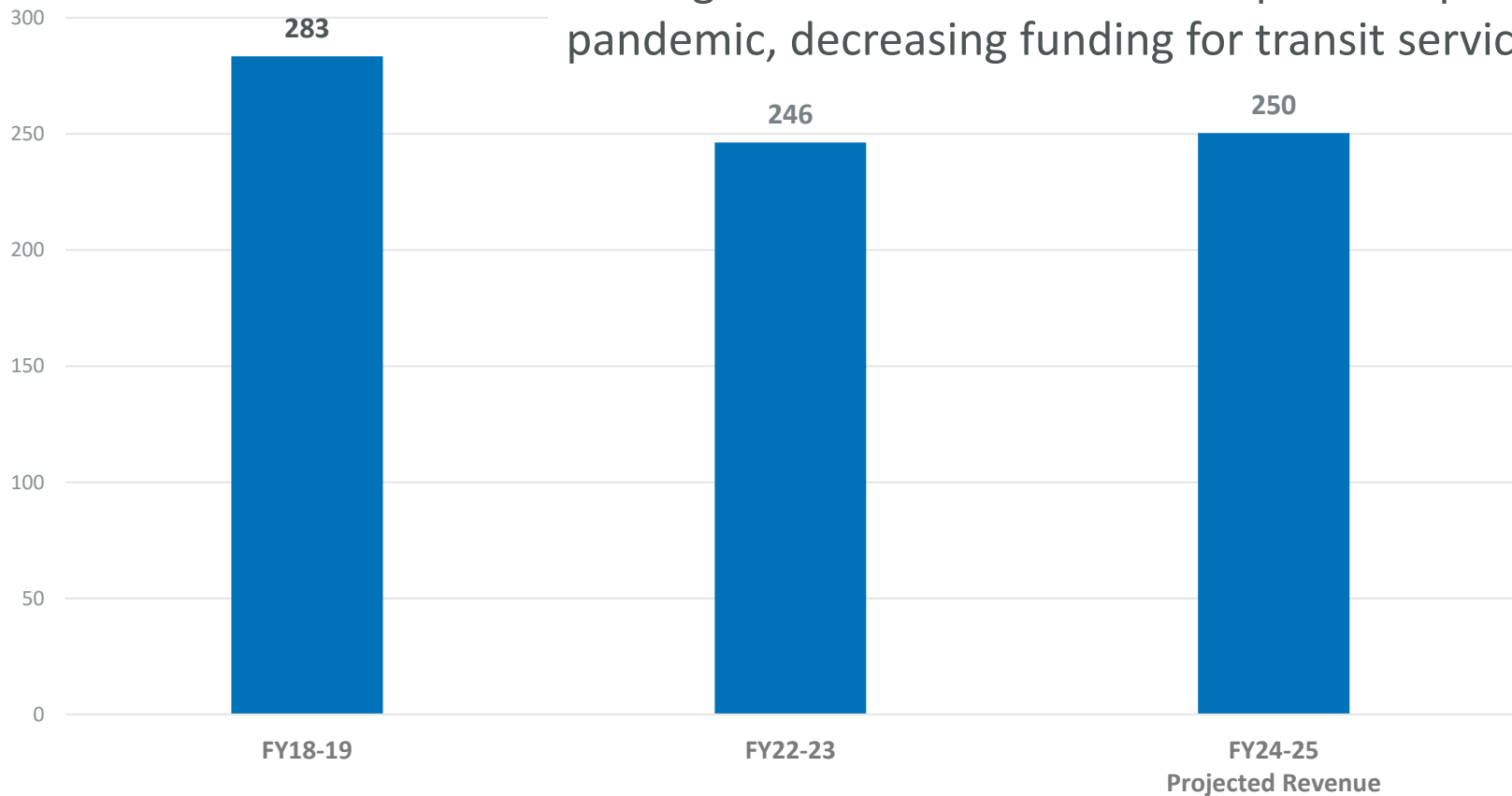
**As of March, projected number of paid single-ride cash fares increased 1.7M over increase in ridership, generating additional \$4.6M in revenue.**



# Parking Revenue

## Parking Revenue (Actuals/Projected \$M)

Parking revenue is down 14% compared to pre-pandemic, decreasing funding for transit service.

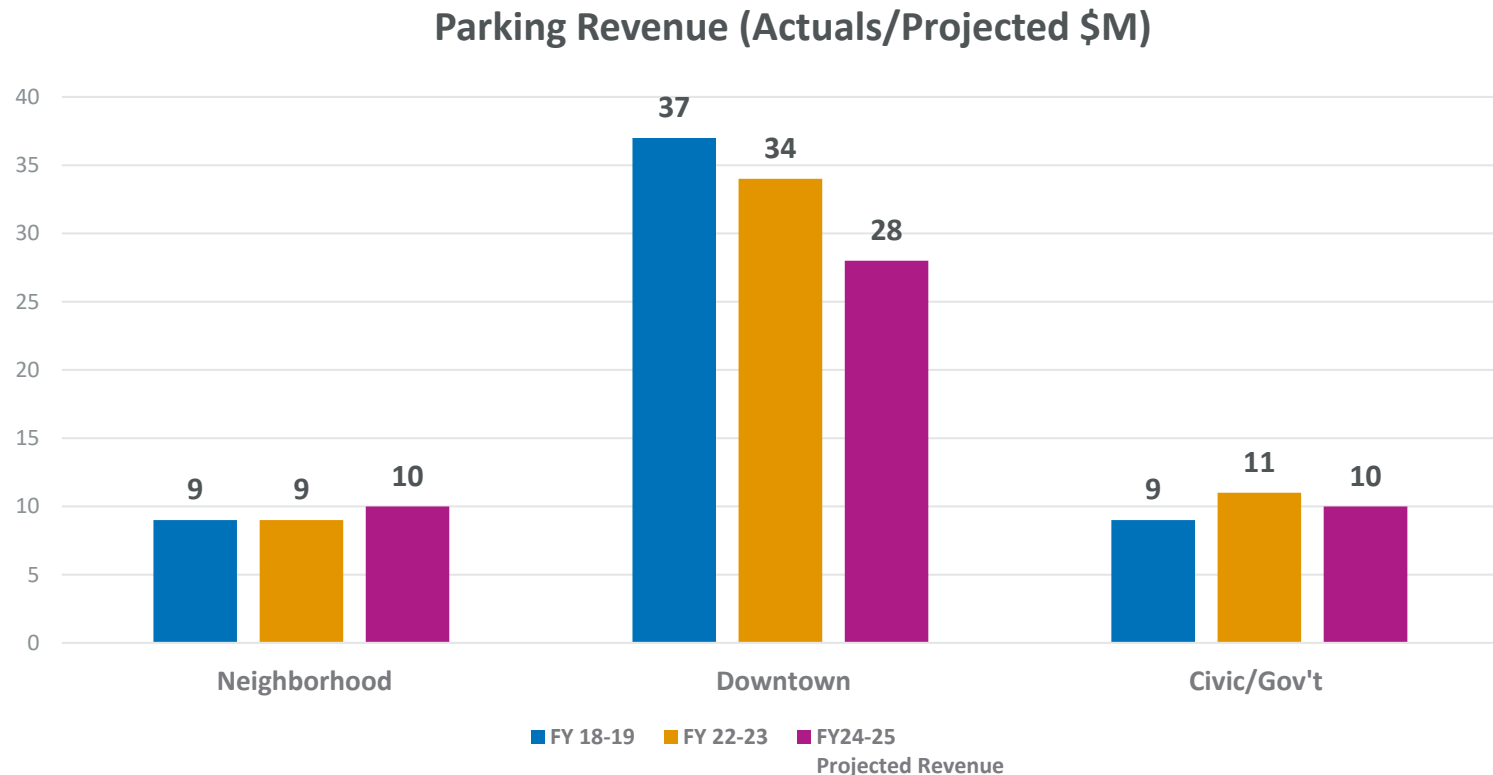


Source: FY24-25 projected revenue based on April 2025 9-month report.

Note: Include Seventh & Harrison Lot to tie to year-end financial data

# Parking Garage Revenue

Positive financial trends at neighborhood and Civic Center garages outweighed by significantly reduced utilization of downtown garages.



Source: FY24-25 projected revenue based on April 2025 9-month report.

Note: Does not include Seventh & Harrison Lot due to insufficient data for comparison. Reflects budgeted parking revenue.