



**SFMTA**  
Municipal  
Transportation  
Agency

# San Francisco Transportation Trends

# City and County of San Francisco

- **2013 estimated SF population:** 837,442; *expands to over 1 million during the day*
- **San Francisco covers just 0.7% of the region's land area but contains:**
  - 11% of the region's population
  - 18% of the region's employment
- **379,583 housing units in 2014**  
*(+5,437 units from 2012)*
- **612,660 jobs in 2013**  
*(+26,400 jobs from 2012)*
- **FY 2014 average daily Muni ridership:** 702,000
- **Registered vehicles in SF (2013):** 463,833



# Regional Growth Projections to 2040

**2010 Regional Population:** 7,150,739

## Plan Bay Area

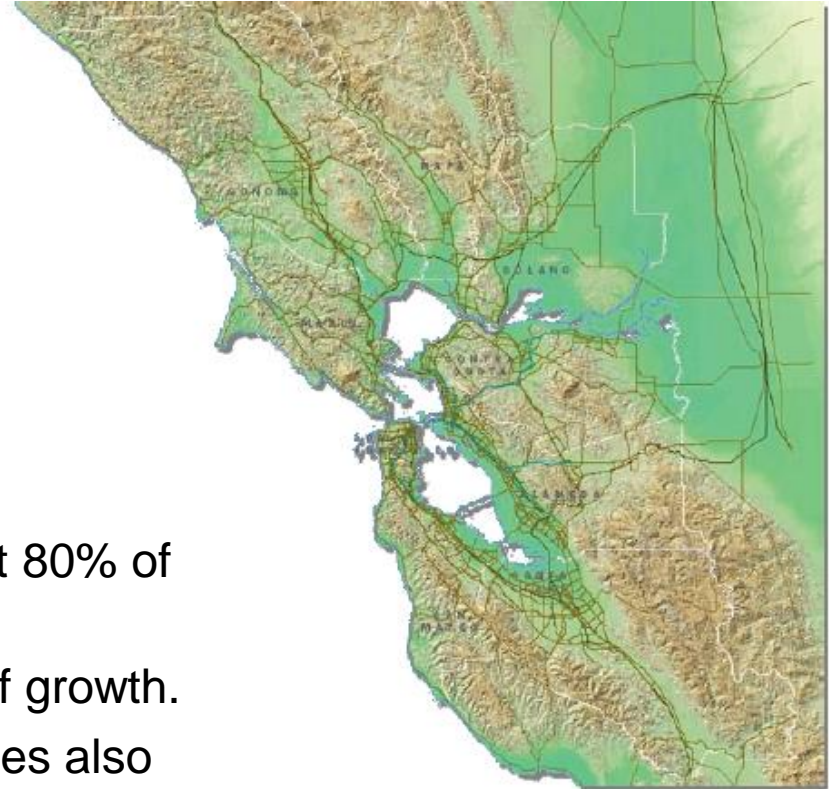
- + 2.1 million people
- + 1.1 million jobs
- + 660,000 housing units

## Regional Growth Strategy

- Priority Development Areas absorb about 80% of housing; 66% of new jobs.
- San Francisco accounts for about 15% of growth.
- San Jose, Oakland, and medium size cities also contribute significantly to new housing & jobs.

## San Francisco's Role

- + 280,000 new residents
- + 191,000 jobs > 6,500 new jobs annually
- + 92,410 housing units > 3,000 new units annually



# Growing faster than expected



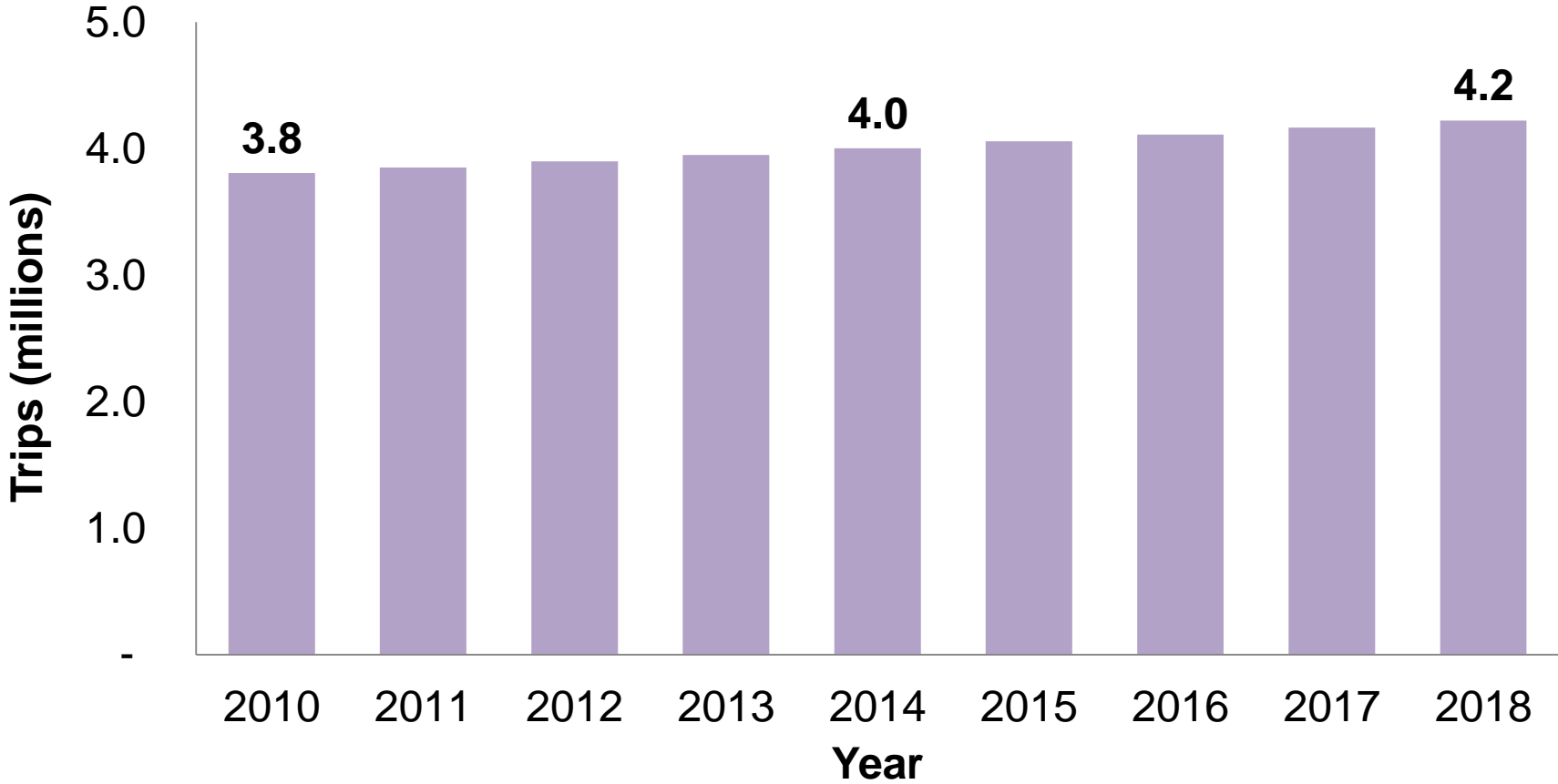
New construction in 2013 was 26% over the 10-year average



Employment in 2013 was up 7%, 17% over the last decade

# Mode Analysis Travel Trends

## Daily Trips to, from and within San Francisco



\*Source: SF – CHAMP (2010); US Census Population Estimates

# Average Trip Distance



2.8 miles



3.4 miles



0.9 miles

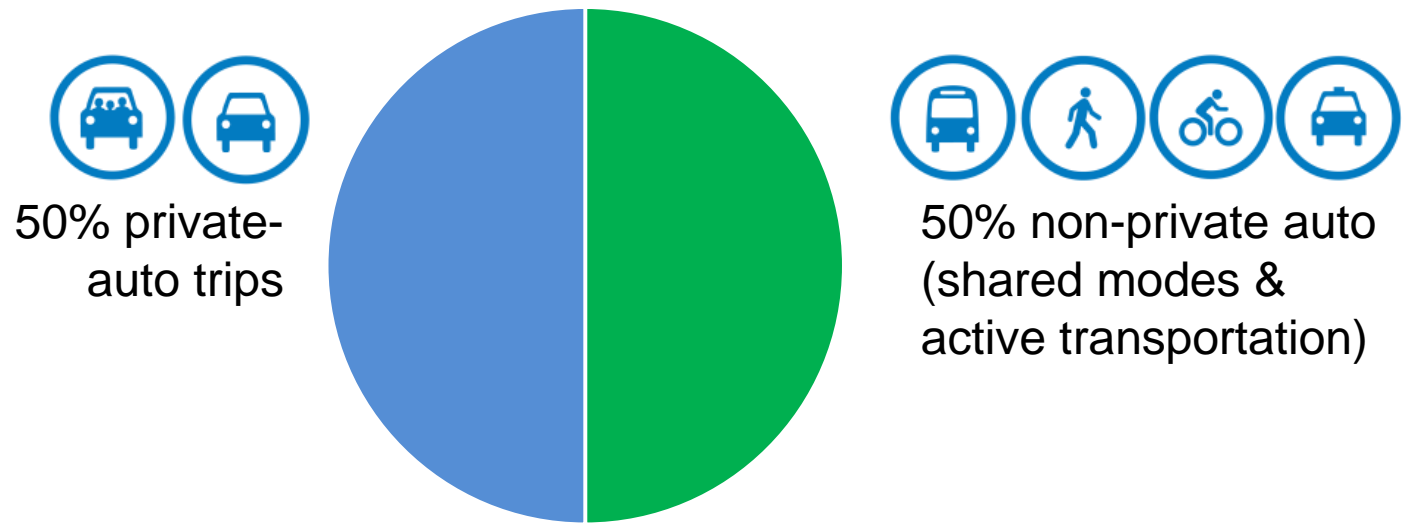


2.3 miles

*Many driving trips may be able to be made by transit, biking, and walking.*

# Strategic Plan Objective 2.3: Mode Share

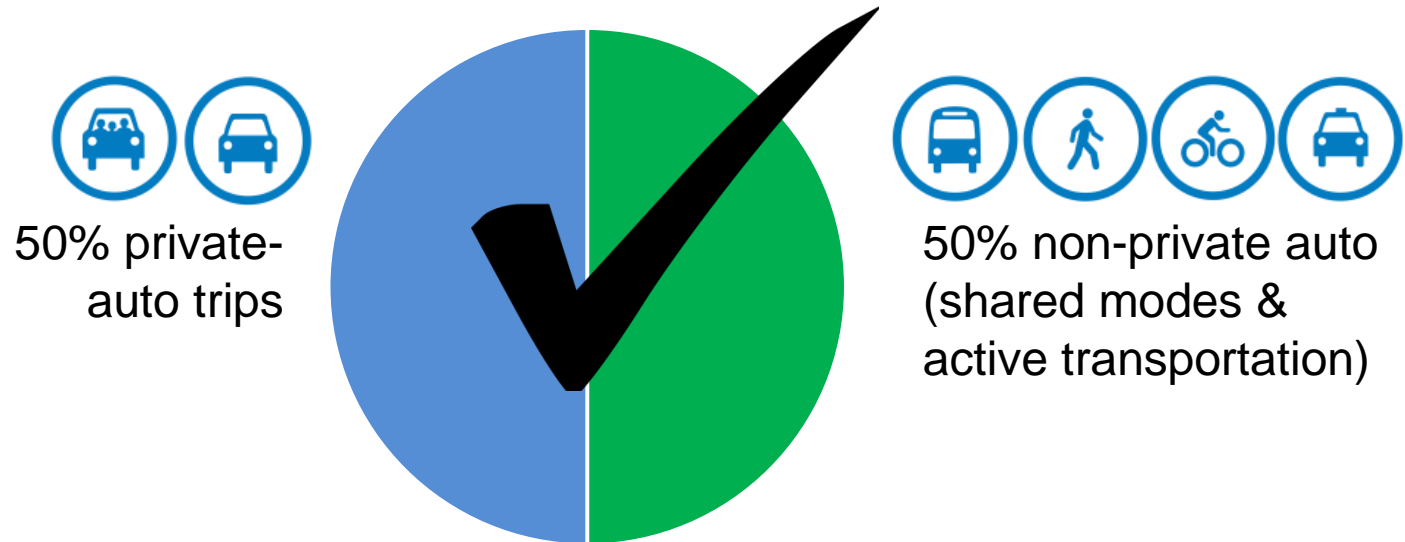
Increase use of all non-private auto modes



FY 2018 Target

# 2015 Status Update

San Francisco is at the target mode share level



FY 2018 Target



# Why?

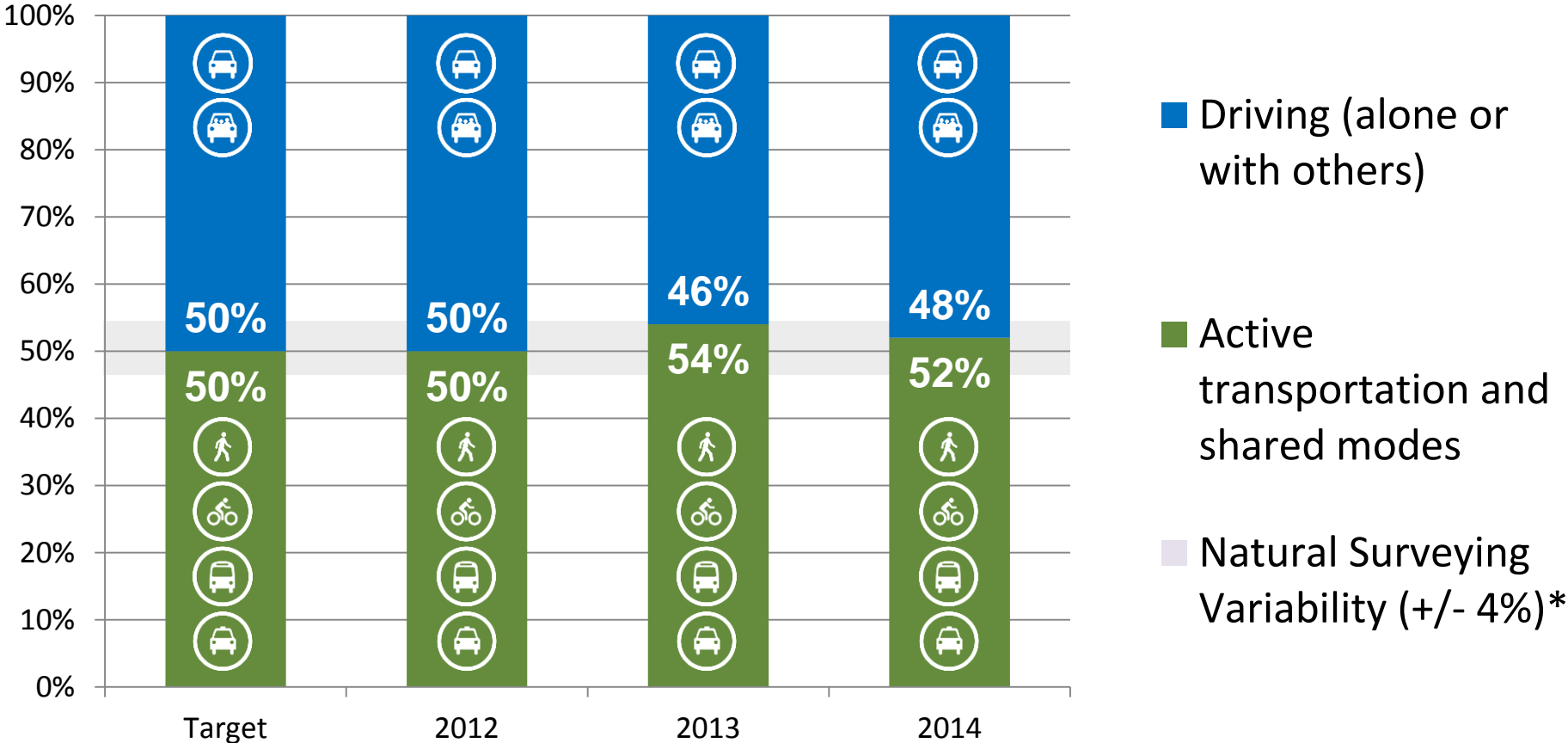
1. Improved evaluation approach
2. More current data
3. Changing travel behavior
4. New transportation improvements, technologies and services
5. Increasing population and trips
6. Rising constraints on the transportation system

# SFMTA is resetting the baseline

- **Original baseline data: 62% private auto trips**
  - Source: SF-CHAMP travel model
  - Largely driven from the region-wide Bay Area Household Travel Survey (BATS), and other large-scale survey data, such as the US American Communities Survey
  - Comprehensive updates for BATS available every 5 – 15 years
- **Updated evaluation baseline: 50% private auto trips**
  - San Francisco trip-focused Travel Decision Survey
  - Consultant developed survey for annual evaluation of Strategic Target 2.3
  - Compared to US ACS data: evaluation is inclusive of all trip types and is based on actual trips taken

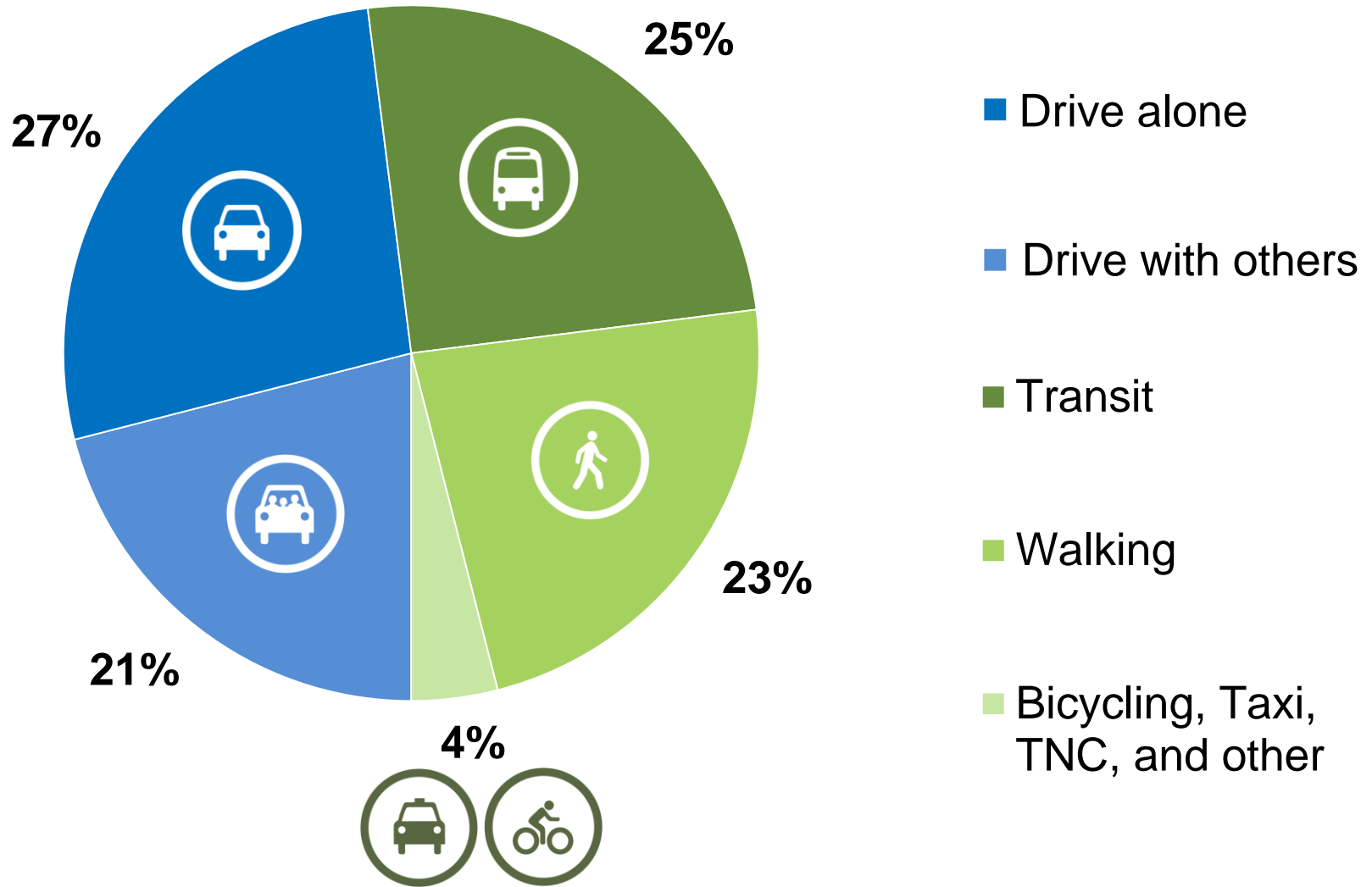
# SF Travel Decision Survey results

The SF Travel Decision Survey has shown target-level results with every survey from 2012 - 2014.



\*Natural surveying variability for an actual mode split of 50% driving, 50% active transportation and shared modes, for a survey of 750 participants, is +/- 4%

# 2014 Travel Decision Survey Findings



# Driving & Parking



**48% of all  
trips are by  
private  
vehicles**



## Challenges:

- The Bay Area is among **top 5 most congested regions in the nation** and private vehicles, bicycles, and transit vehicles often **travel in the same lanes**
- **Failing to yield to people walking** accounts for 41% of the collisions where motorists are at fault.
- **Circling for parking** accounts for an average 30% of driving

# Public Transit



**25% of all  
trips are by  
transit**



## Challenges:

- **Aging fleet and infrastructure** means high maintenance costs and ongoing need for investment
- **Limited right-of-way** on major corridors make it difficult to dedicate space to transit
- Muni ridership up 7% since 2010, and **demand exceeds capacity** on the Muni Metro

# Walking



**23% of all trips  
are walk-only**

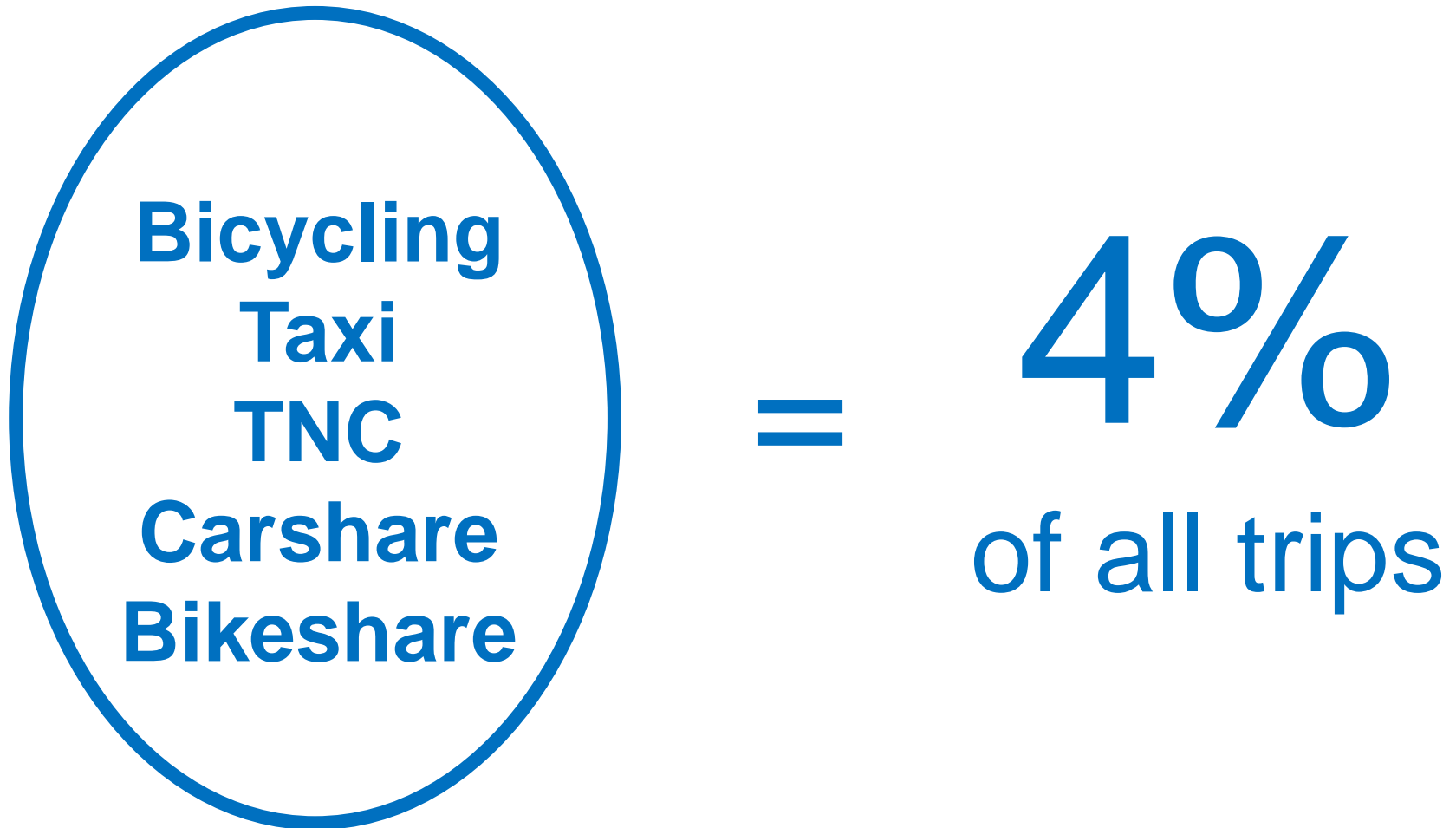
**All transit and drive trips start  
and end with a walk, too.**



## Challenges:

- **60% of severe and fatal pedestrian injuries occurred on 6% of the streets**
- Collisions at **high traffic speeds** are more likely to cause serious or fatal injuries to people walking

# Bicycling and Shared Modes



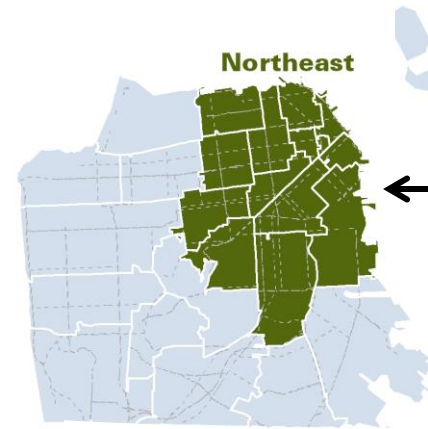
*Single year Travel Decision Survey data will not be used to evaluate change for these transportation types until individual travel type usage grows beyond the margin of error.*



# Bicycling



**5 million trips  
by bicycle** were  
counted by the 18  
automated bicycle  
counters in 2013



**Core  
Bicycle  
Area**

(4% of all trips are  
bicycle trips)

## Challenges:

- The **fragmented network** leads to a lack of consistency in comfort levels along the network
- **Limited right-of-way** on major corridors make it difficult to dedicate space to bicycling
- **The hilly topography** makes it difficult for a broad range of people to bicycle throughout the city



**20% of San Franciscans use taxis at least monthly**



## Challenges:

- 73% of SF residents have tried a taxi but **overall use is declining.**
- Taxis more heavily relied on **for residents in the northeast core**

# Transportation Network Companies (TNCs)

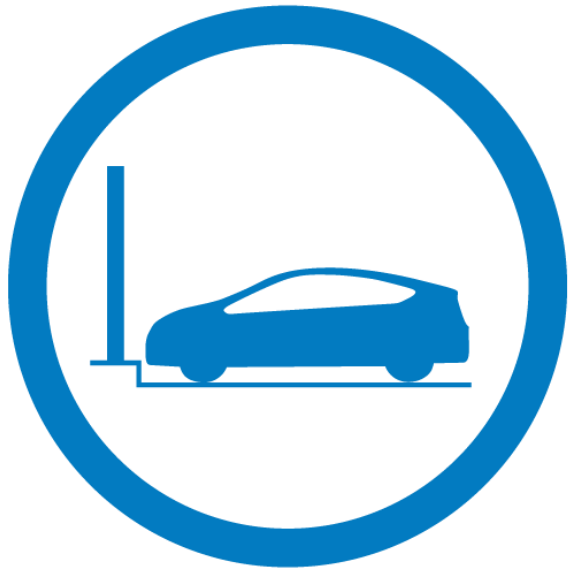


**25% of San Franciscans use TNCs at least monthly**



## Challenges:

- **State-level regulation** of these newer transportation services
- **TNCs growing in market share since 2012** and use is higher for residents of the northeast core
- **Lack of accessible vehicles** limit use of TNCs



**6% of San Franciscans use carshare at least monthly**



## Challenges:

- **Limited right-of-way** make it difficult to dedicate space for carshare vehicles
- **Limited number of available vehicles** and carshare pod locations throughout the city hamper widespread use



**4% of San Franciscans have tried Bay Area Bike Share**



## Challenges:

- **350 bicycles in 35 stations in San Francisco** only in Downtown and SoMa areas
- Sale of the Equipment & Software Provider and the Operations & Maintenance Contractor have **slowed expansion**
- Current **scale of investment** in bike sharing does not meet demand nor realize the benefits that would increase exponentially with scale

## Should the FY 2018 Mode Share Target be reset?

- Daily trips are growing by approx. 50,000 each year
- Just staying at the 50/50 target depends upon **significant and continued investment** in shared modes and active transportation.
  - Investing in street safety and complete streets projects
  - Increasing transit reliability and capacity
  - Adding protected facilities to the bicycle network
  - Supporting transportation choices through active transportation and shared mobility facilities