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

<table>
<thead>
<tr>
<th>Year</th>
<th>Trips (millions)</th>
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<tbody>
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<td>2010</td>
<td>3.8</td>
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<td>2011</td>
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<td>2018</td>
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*Source: SF – CHAMP (2010); US Census Population Estimates*
Many driving trips may be able to be made by transit, biking, and walking.

*Source: SF – CHAMP (2010); US Census Population Estimates*
Increase use of all non-private auto modes

- 50% private-auto trips
- 50% non-private auto (shared modes & active transportation)

FY 2018 Target
San Francisco is at the target mode share level

FY 2018 Target

50% private-auto trips

50% non-private auto (shared modes & active transportation)
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
The SF Travel Decision Survey has shown target-level results with every survey from 2012 - 2014.

- **Driving (alone or with others)**
  - Target: 50%
  - 2012: 50%
  - 2013: 46%
  - 2014: 48%

- **Active transportation and shared modes**
  - Target: 50%
  - 2012: 50%
  - 2013: 54%
  - 2014: 52%

Natural Surveying Variability (± 4%)*

*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

- Drive alone: 27%
- Drive with others: 23%
- Transit: 25%
- Walking: 4%
- Bicycling, Taxi, TNC, and other: 21%
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.
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.
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

Bicycling
Taxi
TNC
Carshare
Bikeshare

= 4% of all trips

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.
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.

**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:

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

25% of San Franciscans use TNCs at least monthly
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
BikeShare

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

4% of San Franciscans have tried Bay Area Bike Share
Key Policy Considerations

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