Transportation 2050 (T2050) presents possible futures and actions to address transportation needs and priorities in San Francisco.

Years of community planning, visioning and technical analysis

Transportation Task Force 2013 (T2030)

Transportation Task Force 2018 (T2045)

ConnectSF

Vision Zero Action Plan

SFMTA 20-Year Capital Plan

SFMTA State of Good Repair Report

2021 SFMTA Community Survey

SFMTA 5-Year CIP

SFMTA 2-Year Budget

SF Transportation Plan
We have analyzed numerous possible futures and it is time for a call to action.

We are $50 billion short of the transportation system San Francisco needs over the next 30 years.

But we can act now to put San Francisco on a path to success.
How did we get here? San Francisco has grown. Transportation has changed. Our financial structures have not.

While our visions and values have modernized, how we fund the vision and advance our values has not.
We have looked at our past, and charted out our future.

We are on an unsustainable path. But we can correct it.

The COVID-19 pandemic put the SFMTA on a financial path it cannot recover from alone.
Introduction

Through much of the last decade, SFMTA operating revenues came in as predicted. However, enterprise revenues (parking and transit fares), declined. The difference was the General Fund, and 10-years of economic growth in San Francisco.

The economic shock and impacts of the COVID-19 pandemic have permanently moved the revenue curve. It will be years before enterprise revenues recover.
The SFMTA’s operating expenditures continue to grow as projected in 2009. While revenues have declined, the cost of living in the San Francisco Bay Area and the growth of San Francisco have resulted in a predictable expenditure growth trend.

After the last recession, expenditures largely came in lower than originally projected, while revenues came in as expected, this created a period of positive fund balance for the SFMTA as the San Francisco economy grew for nearly 10 years.
With expenditures growing with Bay Area Cost of Living, and revenues permanently impacted by the COVID-19 pandemic when federal relief is exhausted, there is a funding gap that cannot be closed. Expenditures will outpace revenue. A new source is required to get the SFMTA back on track.

Prior to the pandemic this “structural deficit” was closed by shifting infrastructure/maintenance dollars to sustain operations and service. Post-pandemic, there are no other revenue tools left to the SFMTA.

Prior to the pandemic enterprise revenues were in decline, and revenues were generally lower than predicted in 2019. Expenditures generally were matched to the revenue curve.

The COVID-19 pandemic caused a steep drop in revenues, closed in FY 22 and 23 with Federal Relief. When exhausted, the revenue curve will not shift upward until 2025.
Today’s Workshop

Vision
Update on ConnectSF
• Transit Investment Strategy
• Streets and Freeways Strategy

Cost
Update on the 20-Year Capital Plan
• Capital Plan Needs – Infrastructure Costs
• Capital Investment Packages - Priorities

Action
Transportation 2050
• Community Survey & Priorities
• Analysis of Funding Gaps
• Potential Funding Measures
ConnectSF
Update on Transit Investment Strategy
Update on Streets and Freeways Strategy
connectsf.org ConnectSF@sfgov.org
Today’s Informational Presentation

- ConnectSF background
- Transit Investment Strategy
- Streets & Freeways Strategy
- Integrating the Strategies into future planning:
  - San Francisco Transportation Plan
  - Transportation Element
About ConnectSF

Phase 1
Vision
ConnectSF Vision

Phase 2
Needs
Statement of Needs
Transit Corridors Study
Streets and Freeways Study

Phase 3 Policies & Priorities
San Francisco Transportation Plan
Transportation Element of SF General Plan
Prior Work: Key Findings Recap

Challenges to Address

Create Equitable Transportation Outcomes
- Improve transportation connections for outer neighborhoods
- Improve jobs access via sustainable modes

Improve Sustainability
- Reduce emissions by shifting trips
- Further expand transit capacity
- Manage congestion

Accommodate Forecasted Growth
Transit Investment Strategy
Transit Investment Strategy Goals

- Build upon pandemic recovery efforts
- Prioritize communities and individuals that are most dependent on transit
- Adapt to changing travel needs between neighborhoods, not just to downtown
- Address state of good repair backlog
- Continue to reduce crowding and delay
- Improve connections to the region
Key Recommendations

1. Make the system work better with maintenance and restoration

2. Build a five-minute network for reliable transit service citywide

3. Increase speed, reliability, and capacity for a modern rail system

4. Build more rail where bus service won’t be able to meet demand
Maintain and Restore our Transit System
Five-Minute Network
Improved Speed & Reliability

Street and signal improvements to preserve transit speed and reliability

Fast, frequent service and easy transfers throughout SF
Regional and Local Express Service

Local and regional transit service that runs on freeways and highways

Dedicated express lanes to destinations within San Francisco and throughout the Bay Area

Complements rail and ferries
3 Renew and Modernize Our Rail System

Subway renewal addresses crowding and congestion

Rebuild our aging rail network

Expand critical infrastructure that keeps trains moving

Longer trains and more reliable service
Build Rail to SF’s Busiest Places
Streets & Freeways Strategy
Challenges for our Streets and Freeways

We have limited street space

Freeways divide some communities, create negative impacts

Respond to the climate crisis

<table>
<thead>
<tr>
<th></th>
<th>48%</th>
<th>41%</th>
<th>12%</th>
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<tbody>
<tr>
<td>TRANSPORTATION</td>
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<tr>
<td>CARS &amp; TRUCKS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTHER TRANSPORTATION</td>
<td></td>
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</tr>
</tbody>
</table>
Key Recommendations

1. **Maintain and reinvest** in the current transportation system

2. **Prioritize transit and carpooling** on our streets and freeways

3. **Build a complete network** for walking and biking

4. **Prioritize safety** in all investments and through targeted programs

5. **Repair harms and reconnect communities**
1 Maintain and Reinvest in the Current Transportation System
Prioritize Transit and Carpooling on our Streets & Freeways

Exploring pricing to help transit and carpools move more quickly and reliably in congested areas

Lead with equity

- Robust community involvement
- Discounts for people with low-incomes
- Use revenues to improve transit
Build A Complete Network for Walking and Biking
Prioritize Safety in all Investments and through Targeted Programs
Prioritize Safety in all Investments and through Targeted Programs

Where successful and needed, make quick build permanent

Develop comprehensive speed management, focused on auto-oriented streets

Improve freeway ramps throughout the City
Repair Harms & Reconnect Communities

**Short**
- Urban greening
- Reduce truck impacts

**Medium**
- New grade-separated pedestrian crossings

**Long**
- Explore transformative projects
Outreach Completed Since Last Update

- Late 2019-Early 2020 Transportation Needs Outreach
  - Community workshops and individual community group presentations

- April-July 2021 Investment Strategies Outreach
  - Online surveys due to COVID restrictions
  - Available in four languages – English, Chinese, Spanish, and Filipino
  - Stipends offered to community groups to help us reach people of color and low income constituents

- Additional presentations available to neighborhood and community groups as requested
Remaining Timeline for 2021 and Early 2022

- **Summer**
  - Share findings from Transit Corridor Study and Streets and Freeway Study outreach
  - Further outreach and technical analysis to support San Francisco Transportation Plan (SFTP) development

- **Fall/Winter**
  - Transit Corridor Study publication
  - Develop SFTP constrained and vision investment scenarios
  - Conduct citywide outreach
  - Begin development of Transportation Element of the General Plan
What’s Next?

- **San Francisco Transportation Plan**
  - Long-range, multimodal investment & policy blueprint for SF
  - Financially constrained plan based on reasonably expected funding sources
  - Visionary investment strategy that considers how to invest new revenues

- **Transportation Element Update**
  - Guides policy implementation in City codes and project approvals
  - Integrates transport, land use, environmental justice, and resiliency
  - Receives environmental clearance
2021 SFMTA 20-Year Capital Plan Update

SFMTA Board of Directors
August 17, 2021
Capital Plan in Context

- **ConnectSF**
  - Vision for the Transportation System
  - Supported by Federal / State / Local resources
  - Includes investments in Service and Infrastructure

- **20-Year Capital Plan**
  - 20 Years of Fiscally Unconstrained Infrastructure Needs
  - Informs 5-Year Constrained Capital Improvement Program

- **Transportation 2050**
  - Community Survey & Priorities
  - Analysis of Funding Gaps
  - Potential Funding Measures
SFMTA 20-Year Capital Plan

Capital Plan Purpose

1. Provide a pathway to meet our strategic goals
2. Inform local and regional plans
3. Help coordinate the implementation of SFMTA plans, programs and strategies
4. Inform development of the 5-year CIP
5. Create accountability and build trust

$31.3B of identified Capital Needs over 20 years, or $1.6B annually

SFMTA’s average annual capital budget for the past five years is $732M
Capital Needs by Capital Program
(In $ Millions)

$31.3B
Total Capital Need
Over 20 Years

$10,903

- Fleet: $5,567
- Facility: $4,746
- Comm/IT: $204
- Parking: $694
- Security: $567
- Streets: $5,025
- Taxi: $66
- Traffic Signals & Signs: $1,515
- Transit Fixed Guideway: $1,969
- Transit Optimization & Expansion: $10,903

Legend:
- Blue: Restore
- Red: Enhance
- Gray: Expand
Capital Investment Packages

- MAKE STREETS SAFER
- MAKE THE TRANSPORTATION SYSTEM UNIVERSALLY ACCESSIBLE
- MAKE THE TRANSPORTATION SYSTEM WORK
  - FACILITIES MODERNIZATION
  - TRANSIT MODERNIZATION
  - SYSTEM ELECTRIFICATION
  - WALKING AND BIKING NETWORK
- RENEW AND MODERNIZE THE RAIL SYSTEM
- BUILD THE FIVE-MINUTE NETWORK AND EXPAND THE RAIL NETWORK
Next Steps

• Assess Capital Needs based on Strategic Plan
• Incorporate Capital Needs assessment into Capital Plan
• Seek SFMTA Board approval of full Capital Plan
Questions?
San Francisco
TRANSPORTATION 2050

SFMTA Board of Directors
August 2021 Update
Transportation 2050 (T2050) builds upon the work done by the two prior Transportation Task Forces.

Reference: Transportation 2030 Report
Reference: Transportation 2045 Report
“It is with some measure of urgency that we present this report on the critical funding needs of San Francisco’s transportation systems from now through the year 2045. Throughout the Task Force process, nearly 60 representatives of the city’s neighborhoods, businesses, civic organizations, advocacy groups and agency staff came together to grapple with difficult questions. This report updates and builds on previous analysis, with a list of potential funding sources presented in the context of a particularly tenuous federal landscape for infrastructure funding. Task Force members have outlined both investments and revenue priorities through an equity lens, and tasked city leaders to take action today to secure the $100 million annual contribution to our overall transportation need.”

Reference: Transportation 2045 Report
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Reference: Transportation 2045 Report
Sources getting the highest support among task force members in 2018 ranged from $83 – $353 m/annually.

<table>
<thead>
<tr>
<th>Source</th>
<th>Low Range</th>
<th>High Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Tax</td>
<td>$50 m/yr</td>
<td>$150 m/yr</td>
</tr>
<tr>
<td>Gross Receipts: Commercial Property Rent Tax Increase</td>
<td>$13 m/yr</td>
<td>$100 m/yr</td>
</tr>
<tr>
<td>Vehicle License Fee (VLF)</td>
<td>$12 m/yr</td>
<td>$73 m/yr</td>
</tr>
<tr>
<td>Gross Receipts: Platform/Gig Economy Tax</td>
<td>$8 m/yr</td>
<td>$30 m/yr</td>
</tr>
</tbody>
</table>

Reference: Transportation 2045 Report
We last considered T2050 at the SFMTA Board Workshop in February 2021.

Solicit feedback from the public on priorities:

- SFMTA Community Survey (June 15, 2021)

Report Backs:

- State of Good Repair Report (July 20, 2021)
- Vision Zero Action Strategy (July 20, 2021)
- SFMTA 20-Year Capital Plan (Today)
- ConnectSF Transit Investment Strategy (Today)
- ConnectSF Streets and Freeway Strategy (Today)
We asked, you answered.
(2021 Community Survey)
A recent citywide survey has made it clear: Muni is a vital part of the community

92% of respondents think “a vital part of the community” describes Muni well

Source: San Francisco citywide survey conducted by FM3, April 2021
To continue being a vital part of the community, you’ve told us your priorities are:

- Investing Equitably
- Fast and Convenient Transit
- More Repairs and Maintenance
- Improving Safety and Access
Investing Equitably

A majority of survey respondents say it is “very important” or “extremely important” to ...

79%

Increase and improve Muni service for the communities most dependent on transit

Source: San Francisco citywide survey conducted by FM3, April 2021
And really, investing equitably is part of everything we do at SFMTA

Investing Equitably

Fast and Convenient Transit

More Repairs and Maintenance

Improving Safety and Access
Fast and Convenient Transit

A majority of survey respondents say it is “very important” or “extremely important” to...

- **80%**  Provide quick, convenient transit access to all parts of San Francisco
- **76%**  Reduce delays to make Muni more reliable
- **65%**  Reduce crowding on Muni

Source: San Francisco citywide survey conducted by FM3, April 2021
More Repairs and Maintenance

A majority of survey respondents say it is “very important” or “extremely important” to ...

- **80%**: Repair and maintain Muni equipment and facilities to ensure vehicles’ safety, frequency, and reliability
- **68%**: Address the backlog of maintenance work
- **67%**: Rebuild San Francisco’s aging rail network

Source: San Francisco citywide survey conducted by FM3, April 2021
Improving Safety and Access

A majority of survey respondents say it is “very important” or “extremely important” to...

- Ensure Muni service is inclusive and accessible to all: 78%
- Make street safety improvements for walking: 68%

Source: San Francisco citywide survey conducted by FM3, April 2021
We couldn’t agree more.
Here’s how we're focusing on your priorities and vision

**Fast and Convenient Transit**
1. Create a Five-Minute Network
2. Expand the rail network

**More Repairs and Maintenance**
1. Make the transportation system work
2. Modernize the rail and subway system

**Improving Safety and Access**
1. Make streets safer
2. Make the transportation system universally accessible

INVESTING EQUITABLY
Here are your priorities ... and their cost over 30-years to 2050

INVESTING EQUITABLY

- Fast and Convenient Transit
- More Repairs and Maintenance
- Improving Safety and Access

$111.3B
What the vision will require us to spend over 30-years

$63.4B
We will spend over the next 30-years
57% funded

($47.8B)
T2050 Funding Gap
Cumulative total over 30-years
43% funding gap
Achieving the vision isn't currently possible because our costs would be much higher than our revenues.

Projected Operating and Capital Funding Gap ($ Billions)

- $0B
- $5B
- $10B
- $15B
- $20B
- $25B
- $30B
- $35B
- $40B
- $45B
- $50B

Fiscal Year

22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50

Average annual funding gap over the next 30 years, leading to a cumulative total gap of $47B
This includes a gap in funding for capital investments, like vehicles and infrastructure ...

$674M

Average Annual Capital Funding Gap

To keep the system running smoothly and expand it based on your priorities
... and a gap in funding for operating expenses: running buses and trains

Projected Operating Funding Gap ($ Billions)

Fiscal Year

$921M

Average Annual Operating Funding Gap

To run trains and buses in line with your priorities
However, 2050 is a long time from now.
What if we focus on the next 10 years?
Based on your priorities, we have created three potential futures.

System in a state of good repair; maintenance done on-time; pre-pandemic service; 20% service increase; 5-minute network implemented; streets are safer and accessible to all.

System in a state of good repair. Maintenance and asset replacement done on-time. Return to pre-pandemic service in 2023. System is not expanded.

A mixture of core infrastructure, enhancements and expansion. Return to pre-pandemic service in 2023. Infrastructure replacement backlog does not grow.

**Implementing SF Vision**

**Focus on State of Good Repair**

**Balanced Approach**
Over the next 10 years, the gap will be $1.04B per year on average.
Even with a balanced approach, there’s still a projected funding gap of $300M per year over the next 10 years
If we focus instead primarily on the State of Good Repair backlog, we end up with a 10-year projected funding gap of $270 per year.

- **$1.04B/Yr Gap** (Implementing SF Vision)
- **$270M/Yr Gap** (Focus on State of Good Repair)
- **$300M/Yr Gap** (Balanced Approach)
We’ve identified some new potential revenue sources, which combined could amount to $149M per year

- **Implementing SF Vision**: $1.04B/Yr Gap
- **Focus on State of Good Repair**: $270M/Yr Gap
- **Balanced Approach**: $300M/Yr Gap

**$149M**
Potential New Yearly Revenue Sources
These potential new revenue sources are:

**$149M**

<table>
<thead>
<tr>
<th>Source</th>
<th>Revenue</th>
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<tbody>
<tr>
<td>Transportation Special Tax</td>
<td>$43.9M</td>
</tr>
<tr>
<td>GO Bond 2022</td>
<td>$40.0M</td>
</tr>
<tr>
<td>Increase in Federal Revenue (+15%)</td>
<td>$35.4M</td>
</tr>
<tr>
<td>Parking Tax</td>
<td>$20.6M</td>
</tr>
</tbody>
</table>

Development Revenue: $2.5M

Increase in State Revenue (+10%): $6.7M
## These potential new revenue sources are:

<table>
<thead>
<tr>
<th>Source</th>
<th>Benefits</th>
<th>Short Term $/yr</th>
<th>Long Term $/yr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation Special Tax</td>
<td>Dedicated tax for transportation, providing a predictable stable source for transit service and maintenance. May be bonded against for near-term capital infrastructure investment, reducing long term maintenance.</td>
<td>$50 m/yr</td>
<td>$60-70/yr</td>
</tr>
<tr>
<td>Parking Tax</td>
<td>Increase existing San Francisco Parking Tax with opportunities to reform or modify for transportation infrastructure, transit service and maintenance.</td>
<td>$20m/yr</td>
<td>Declining</td>
</tr>
<tr>
<td>CCSF General Obligation Bond Program</td>
<td>The SFMTA as part of the City GO Bond Program has allowed for critical infrastructure investment, safety improvements and transit reliability investments – reducing the cost of operations and long-term maintenance.</td>
<td>$40 m/yr</td>
<td>$50 m/yr</td>
</tr>
<tr>
<td>Federal Grants</td>
<td>The current proposed bi-partisan Infrastructure Bill provides opportunities for increased Federal support for up to 5-years for transportation infrastructure and maintenance campaigns.</td>
<td>$35 m/yr</td>
<td>$40 m/yr</td>
</tr>
<tr>
<td>State Grants</td>
<td>The current State budget designates significant additional dollars to transportation available through grants for transportation infrastructure.</td>
<td>$7 m/yr</td>
<td>Unknown</td>
</tr>
<tr>
<td>Development Revenue</td>
<td>Development of SFMTA properties provide significant long-term opportunities to produce revenues that can go directly toward transportation infrastructure, transit service and maintenance.</td>
<td>$5 m/yr</td>
<td>$25-35 m/yr</td>
</tr>
</tbody>
</table>
With these new sources, we can fund nearly 2/3 of our vision for San Francisco over 30-years.

$111.3B
What the vision will require us to spend over 30-years

$70.2B
We will spend over the next 30-years
63% funded with new funding sources

($41.0B)
T2050 Funding Gap
Cumulative total over 30-years
37% funding gap
And over 2/3rd of the vision... over 10 years

INVESTING EQUITABLY

Fast and Convenient Transit
More Repairs and Maintenance
Improving Safety and Access

$27.8B
What the vision will require us to spend over 10-years

$18.8B
We will spend over the next 10-years (all sources).
68% funded with new funding sources

($9.0B)
T2050 Funding Gap
Cumulative total over 10-years
32% funding gap
But we can still accomplish a lot ...
By prioritizing near-term, high-impact investments
Thank You.
Appendix.
Impacts of COVID-19 / FY19/20
Parking and transit revenues were relatively flat in the months leading up to February 2020.
But after March 2020, the pandemic cratered both revenue sources.
Parking revenue has partly bounced back
But May 2021 parking revenues were 30% lower than May 2019 levels.

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
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<tbody>
<tr>
<td>May 2019</td>
<td>$27.3M</td>
</tr>
<tr>
<td>May 2021</td>
<td>$19.1M</td>
</tr>
</tbody>
</table>

30% LOWER
Meanwhile, transit revenues have been much slower to return.
May 2021 transit revenues were 84% lower than May 2019 levels.

May 2019: $13.7M

May 2021: $2.2M

84% LOWER
In the near term, federal emergency relief funding will be a necessary stopgap.
All signs point to a slow recovery for Downtown San Francisco
Q2 saw a “further rise in office vacancy” in San Francisco, which were already at historic highs.

Source: Jones Lang LaSalle, via SF Office of the Controller.

Office Vacancy Rates Pre-Pandemic Average (2019)

2020 Q1 2020 Q2 2020 Q3 2020 Q4 2021 Q1 2021 Q2
“SF Metro lags” comparable metro areas in office attendance

Source: Kastle Systems, via SF Office of the Controller
More than one-third of all jobs in San Francisco are in sectors that are well-suited to working from home.

Source: Census LEHD (2018)
The number of people boarding planes at SFO was “well below normal” as of May 2021.

Source: San Francisco International Airport (SFO), via SF Office of the Controller
Future bookings at the Moscone Center significantly below pre-pandemic levels

Source: SF Travel, via SF Office of the Controller
San Francisco’s hotel recovery is the worst in the nation—30% of pre-pandemic levels as of May 2021

Source: American Hotel & Lodging Association
Visitor spending “will not be back to 2019 levels before 2025”

Outlook for the future

San Francisco Travel expects that the situation will gradually improve moving forward. Overall visitation to the city is forecast to reach 15.3 million in 2021. Overall visitor spending is expected to grow from $2.1 billion in 2020 to $3.5 billion in 2021. Total visitation is anticipated to return to pre-pandemic levels by 2023. Spending will not be back to 2019 levels before 2025 due to a slower recovery of international visitors and average rate in the city.

Source: SF Travel
“BART ridership returning, but still below normal”

Source: BART, via SF Office of the Controller
ConnectSF Reference Slides
ConnectSF Background

**ConnectSF** is a multi-agency process to build an effective, equitable, and sustainable transportation system for San Francisco's future.
When the pandemic began, congestion on our streets vanished, demonstrating the time savings riders get when buses aren’t stuck in traffic.
Subway renewal addresses crowding and congestion

Envisions the next generation of subway service for San Francisco

Upgrades such as a new train control system will allow four-car trains and consistent, predictable service.
3  Build A Complete Network for Walking and Biking
Transit Survey Information

- Distributed via ConnectSF and related project email lists
- Paid distribution through community organizations
- Offered individual community group meetings
- Available in four languages – English, Chinese, Spanish, and Filipino
- 549 completed responses
- 3 main questions on long-range transit trade-offs, reasons why you made that choice, and an open-ended question
Initial Survey Response Summary

- All components of the strategy were popular
  - Making the system work better
  - Five Minute Network
  - Rail Modernization
  - Rail Expansion
- Five Minute Network and Major Rail Investments received the most 1st choice votes (~40% each)
  - Many said “do both”, reinforcing the need to build quick, low-cost transit improvements while we advance the long-term rail projects
- 70% listed Rail Modernization as 1st or 2nd choice
Transit Investment Strategy Timeline

Transit Investment Strategy Storymap remains available for public viewing

Staff available to present to community groups and other online meetings upon request

Outreach results being incorporated in Transit Corridors Study Report

Anticipated publication of report in Fall 2021
All Transit Strategy Components were Popular

What types of transit projects listed below are most important to you? Please rank your choices from 1-3, with 1 being your highest priority.

Cost-effective improvements to prioritize buses
- First: 40%
- Second: 30%
- Third: 20%

Improvements to our light rail system
- First: 50%
- Second: 20%
- Third: 10%

Major rail investments (10+ years)
- First: 40%
- Second: 30%
- Third: 20%
Grouped responses by demographics

% of demographic that ranked specific transit investment first

- Cost-effective improvements to prioritize buses 1st
- Improvements to our light rail system 1st
- Major rail investments 1st

- All
- 65 Years Old and Over
- Non-male
- People of Color
- Annual Household Income Under $50,000
- People with Disabilities
- Under 45 Years Old