San Francisco
County Transportation
Authority

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Memorandum

AGENDA ITEM 7

DATE: November 20, 2025

TO: Transportation Authority Board

FROM: Drew Cooper – Acting Co-Deputy Director for Technology, Data & Analysis

SUBJECT: 12/9/2025 Board Meeting: Approve the 2025 San Francisco Congestion Management Program

RECOMMENDATION ☐ Information ☒ Action

Approve the 2025 San Francisco Congestion Management Program (CMP).

SUMMARY

As the Congestion Management Agency (CMA) for San Francisco, the Transportation Authority is responsible for developing and adopting a CMP for San Francisco on a biennial basis. The CMP is the principal policy and technical document that guides the Transportation Authority's CMA activities and demonstrates conformity with state congestion management law.

Transportation system performance has begun to stabilize since the COVID-era changes. Arterial and freeway speeds decreased by 4-6% between 2024 and 2025. Transit speeds and transit travel time reliability stayed constant between 2023 and 2025. Roadway travel time reliability became better on arterials, but reliability on freeways at peak hours worsened significantly, which may reflect overall increasing peak period congestion near pre-Covid levels, while also having more day-of-week variation in peak period congestion typical of the post-Covid era.

Transit ridership is recovering, with Muni, BART, and Caltrain at 72%, 44%, and 54% of 2019 (pre-COVID pandemic) ridership respectively as of April/May 2025, and ridership has continued to grow since then. Muni continues to serve more

☐ Fund Allocation
☐ Fund Programming
☐ Policy/Legislation
☒ Plan/Study
☐ Capital Project Oversight/Delivery
☐ Budget/Finance
☐ Contract/Agreement
☐ Other: _____

than 95% of San Francisco residents within a 5-minute walk of their residence. Moreover, the share of the population within a 5-minute walk of a Muni route with a 5-minute headway increased to 29% for the AM peak and to 27% in 2025 for the PM peak, though this is still lower than the pre-COVID population share within a 5-minute walk of a Muni route with a 5-minute headway. Average monthly micromobility trips have also increased 110% from 2023 to 2025 in data available through September. The number of property-damage only collisions, non-severe injury collisions, and severe injury collisions in San Francisco has remained mostly stable since 2020. However, the number of fatal traffic collisions in 2024 at 42 (of which 23 and 3 involved pedestrians and bikes, respectively) is the highest observed since 2011 (other than 2022 which has the same number of fatal collisions).	

BACKGROUND

The inaugural CMP was adopted in 1991, and the Transportation Authority Board has approved subsequent updates on a biennial basis. The CMP is the principal policy and technical document that guides the Transportation Authority's CMA activities. Through the CMP, the Transportation Authority also monitors the City's conformity with CMP requirements, per state congestion management law. Conformance with the CMP is a requirement for the city to receive state fuel tax subventions and for the city's transportation projects to qualify for state and federal funding.

State congestion management statutes aim to tie transportation project funding decisions to measurable improvement in mobility and access, while considering the impacts of land use decisions on local and regional transportation systems. CMPs also help to implement, at the local level, transportation measures that improve regional air quality.

The original CMP laws were enacted in 1989; since then, multiple legislative actions have amended the CMP requirements. For instance, Senate Bill (SB) 1636 (Figueroa, 2002) granted local jurisdictions the authority to designate Infill Opportunity Zones (IOZs) in areas meeting certain requirements. Within a designated IOZ, the CMA is not required to maintain traffic conditions to the adopted automobile level of service (LOS) standard. SB 743 (Steiner, 2013) modified the criteria for local jurisdictions to designate IOZs. In September 2024, the Board of Supervisors designated an

updated IOZ for San Francisco, covering most of San Francisco based on transit frequency and land use criteria.

CMP Elements. The CMP has several required elements, including:

- A designated congestion management network and biennial monitoring of automobile LOS on this network;
- Assessment of multimodal system performance, including transit measures;
- A land use impact analysis methodology for estimating the transportation impacts of land use changes; and
- A multimodal Capital Improvement Program (CIP).

The CMP also contains the Transportation Authority's technical and policy guidelines for implementing CMP requirements, including deficiency plans, travel demand forecasting, and transportation fund programming.

DISCUSSION

The 2025 CMP is a substantive update, reflecting new data collection, activities related to important policy developments at various levels, and significant planning progress since 2023. Key updates are summarized in the sections below.

Roadway Performance.

- **Fall 2023 Data Anomaly:** Due to an anomaly in the traffic speed data in Fall 2023, this CMP presents analysis that compares 2025 vehicular traffic data to 2024 rather than data from the previous 2023 cycle, as would be typical.
- **Roadway Speeds:** In general, roadway speeds are lower during the PM peak than in the AM peak, conforming to long-time historical trends. Average speeds on the CMP network arterials have decreased since 2024 for both the AM (-4%) and PM (-6%) peaks. Average speeds on CMP network freeways also decreased in both the AM and PM peak (-4%).
- **Roadway Travel Time Reliability:** The Buffer Time Index (BTI) is a measure of the unreliability of travel time and is calculated as the percent of average additional travel time that the travelers need to budget so that they have a 95% chance of arriving on time. Between 2024 and 2025 reliability remained flat on arterials, with the BTI remaining at 22% in the AM peak and decreasing from 21% to 20% in the PM peak (a slight improvement in reliability). In contrast, freeway travel time reliability worsened significantly over the same period from 44% to 57% in the AM peak and from 37% to 61% in the PM peak, indicating a rising need to manage freeway demand.

Transit Performance.

- **Transit Speeds (Muni bus):** The Transportation Authority performed an analysis of Muni bus speeds using data provided by the San Francisco Municipal Transportation Agency (SFMTA) from on-vehicle Automatic Passenger Counters. Average transit travel speeds on the CMP network for both the AM and PM peaks stayed constant between 2023 and 2025, a positive outcome, given the rise in vehicle traffic and multi-modal activity over this period. Transit speeds in 2025 are still higher than that during pre-COVID.
- **Transit Speed Reliability (Muni bus):** Muni bus transit speed information is also used to calculate the coefficient of variation (CV) of speed as a measure of transit speed reliability. The coefficient of variation (CV) is calculated by dividing the standard deviation of the speed by the average speed. The CV is expressed as a percentage of the mean speed. A lower percentage indicates more reliable transit speeds. Transit reliability has stabilized (i.e. variability stayed the same) since 2023, staying at the same levels (21%) observed in 2019 and 2023 for both the AM and PM peaks.
- **Transit Coverage (Muni):** The transit coverage metric reports the percent of San Francisco's total population and total jobs that are within a 5-minute walk of Muni transit service. Since 2023, more than 95% of San Francisco residents live within a 5-minute walk of Muni service. Moreover, the share of the population within a 5-minute walk of a Muni route with a 5-minute headway increased from 27% in 2023 to 29% in 2025 for the AM peak and from 20% in 2023 to 27% in 2025 for the PM peak, though this is still lower than the pre-COVID population share within a 5-minute walk of a Muni route with a 5-minute headway. Transit coverage in terms of jobs for both the AM and PM periods show trends similar to those observed in population transit coverage.
- **Automobile-to-Transit (Muni bus) Speed Ratio:** In 2025, the auto-to-transit speed ratio was 1.8 in both the AM and PM peak periods, indicating that vehicular traffic was a little less than twice as fast as bus speeds.

Mode share.

Driving (alone, sharing a ride, or using a TNC) is the most prevalent mode to both get around within San Francisco (43.9%) and to travel to/from San Francisco (76.3%). For travel within San Francisco, walking is the next most prevalent mode (41.0%). There is also a significant transit share for both travel markets (11.8% for trips within San Francisco, and 21.9% for trips to/from San Francisco).

Other CMP Elements.

- **Transportation Demand Management (TDM):** The TDM Element has been updated to include the City's efforts to implement TDM programs for new developments, through area plans, developer agreements, and planning code requirements, and the City's policy initiative to plan for mode shift long-term as documented in SFTP2050.
- **Land Use Impacts Analysis Program:** This chapter documents updates to the Regional Growth Framework, including updated Priority Development Areas (PDAs), Priority Conservation Areas (PCAs), and Transit Oriented Communities (TOCs) in San Francisco. The Metropolitan Transportation Commission (MTC) recently adopted these new and revised designations as part of the Plan Bay Area 2050+ process. This new regional Sustainable Communities Strategy is expected to be adopted in early 2026. San Francisco is working with MTC to focus future development within PDAs and TOCs in the Bay Area and identify funding for transportation projects that support these areas.
- **CIP:** The CMP must contain a seven-year CIP that identifies investments that maintain or improve transportation system performance. The CMP's CIP is amended concurrently with relevant Transportation Authority Board programming actions. Thus, the 2025 CMP reflects program updates since adoption of the 2023 CMP. Also, as required by state law, the CMP confirms San Francisco's project priorities for the Regional Transportation Improvement Program, which is adopted by MTC for submission to the state.
- **Modeling:** State law requires CMAs to develop, maintain, and utilize a computer model to analyze transportation system performance, assess land use impacts on transportation networks, and evaluate potential transportation investments and policies. The Transportation Authority's activity-based travel demand model, SF-CHAMP, has been updated since 2023, and model enhancements are discussed in the 2025 CMP.

Next Steps. After approval from the Transportation Authority Board, the 2025 CMP report will be submitted to MTC for a review of consistency.

FINANCIAL IMPACT

The recommended action would not have an impact on the adopted Fiscal Year 2025/26 budget.

CAC POSITION

The CAC considered this item at its November 19, 2025 meeting and unanimously adopted a motion of support for the staff recommendation.

SUPPLEMENTAL MATERIALS

- Attachment 1 – Draft 2025 CMP Executive Summary
- Attachment 2 – Resolution
- Enclosure 1 – Draft 2025 San Francisco CMP

ATTACHMENT 1

CONGESTION MANAGEMENT PROGRAM NOVEMBER 2025

Executive Summary

Introduction

Every two years, the San Francisco County Transportation Authority (SFCTA) as the designated county Congestion Management Agency (CMA) for San Francisco prepares the San Francisco Congestion Management Program (CMP). This program is conducted biennially in accordance with state law to monitor congestion, inform policy and long-range planning efforts, and adopt strategies for mitigating traffic congestion that falls below certain thresholds as warranted.

The CMP combines the traffic Level of Service (LOS) and multimodal performance elements required under state CMP legislation, reflecting the legislation's requirement that LOS be included as one of several multimodal performance measures, and that automobile-focused metrics alone, such as LOS, result in a limited view of transportation issues. For this reason, SFCTA's approach is guided by San Francisco's long-standing Transit First policy and emphasis on accessibility for the movement of people and goods by transit, bicycling, walking, and shared modes, while maintaining motor vehicle circulation.

State CMP legislation aims to increase the productivity of existing transportation infrastructure and encourage more efficient use of scarce new dollars for transportation investments, to effectively manage congestion, improve air quality, and facilitate sustainable development. The purpose of the 2025 San Francisco Congestion Management Program is to:

- Define San Francisco's performance measures for congestion management;
- Report congestion monitoring data for San Francisco to the public and the Metropolitan Transportation Commission (MTC);
- Describe San Francisco's congestion management strategies and efforts; and
- Outline the congestion management work program for the two upcoming fiscal years.

State of San Francisco's Transportation System

Transportation system performance has begun to stabilize since the COVID-era changes. Arterial and freeway speeds decreased by 4 – 6% between 2024 and 2025. Transit speeds and transit travel time reliability stayed constant between 2023 and 2025. Roadway travel time reliability became better on arterials, but reliability on freeways at peak hours worsened significantly, which may reflect overall increasing peak period

congestion near pre-Covid levels, while also having more day-of-week variation in peak period congestion typical of the post-Covid era. Traffic counts on Tuesdays through Thursdays at mid-block locations continued to increase between 2023 and 2025 (+5%), reaching 92% of pre-COVID pandemic (2019) levels. This may indicate that arterial congestion is nearing pre-pandemic levels. The Transportation Authority tracks the ratio of travel speeds by private vehicle vs transit as a primary system performance indicator, reflecting San Francisco's long-standing Transit First Policy.

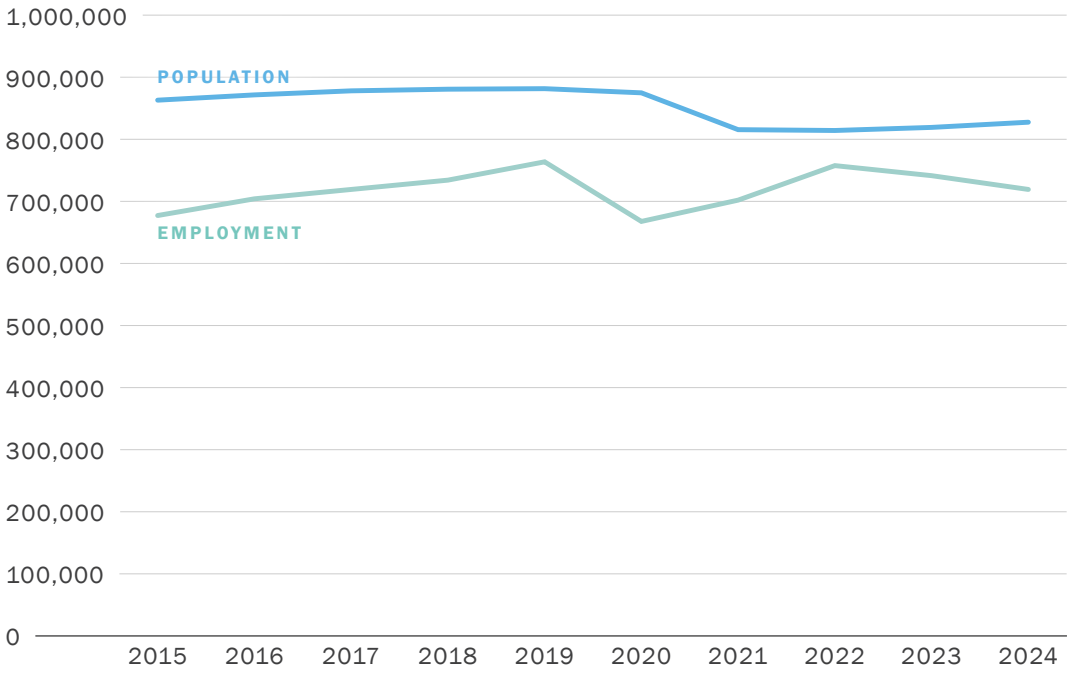
Transit ridership is recovering, with Muni, BART, and Caltrain at 72%, 44%, and 54% of 2019 (pre-COVID pandemic) ridership respectively as of Apr/May 2025, and ridership has continued to grow since then. Muni continues to serve more than 95% of San Francisco residents within a five-minute walk of their residence. Moreover, the share of the population within a five-minute walk of a Muni route with a five-minute headway increased to 29% for the AM Peak and to 27% in 2025 for the PM Peak, though this is still lower than the pre-COVID population share within a five-minute walk of a Muni route with a five-minute headway. Multimodal counts conducted at intersections observed sharply rising bicycle counts in the AM Peak (+42%) and PM Peak (+36%) along with more flat pedestrian counts in the AM Peak (+0%) and a modest increase in the PM Peak (+8%). Average monthly micromobility trips have also increased 110% from 2023 to 2025 in data available through September.

The number of property-damage only (PDO) collisions, non-severe injury collisions, and severe injury collisions in San Francisco has remained mostly stable since 2020. However, the number of fatal traffic collisions in 2024 at 42 (of which 23 and 3 involved pedestrians and bikes, respectively) is the highest observed since 2011 (other than 2022 which has the same number of fatal collisions).

As reported in the Transportation Authority's Downtown Travel Study (March 2025), while San Francisco continues to be an employment and population hub in the Bay Area, significant changes have occurred in both San Francisco population and employment since the COVID pandemic. San Francisco's population declined from a peak in 2019 of 882,000 to 814,000 in 2022 due to the COVID pandemic, but its population has been steadily recovering since, reaching 828,000 by 2024. Employment in San Francisco peaked right before the COVID pandemic in 2019 at 764,000, and dropped due to the COVID pandemic between 2019 and 2020. Employment numbers increased to 758,000 in 2022, though there has been a decrease since then to 719,000 in 2024. The COVID pandemic produced profound changes in commuting patterns that affect the transportation system performance metrics reported in this document. In 2019, only 7% of employed San Francisco residents reported regularly working from home, but during the peak of the COVID pandemic in 2021, this share increased to 46%, before declining in 2023 to 24% of employed residents working from home.[1]

1 ACS One-Year Supplemental Estimates, Table K200801

Figure 0-1. San Francisco Population and Employment



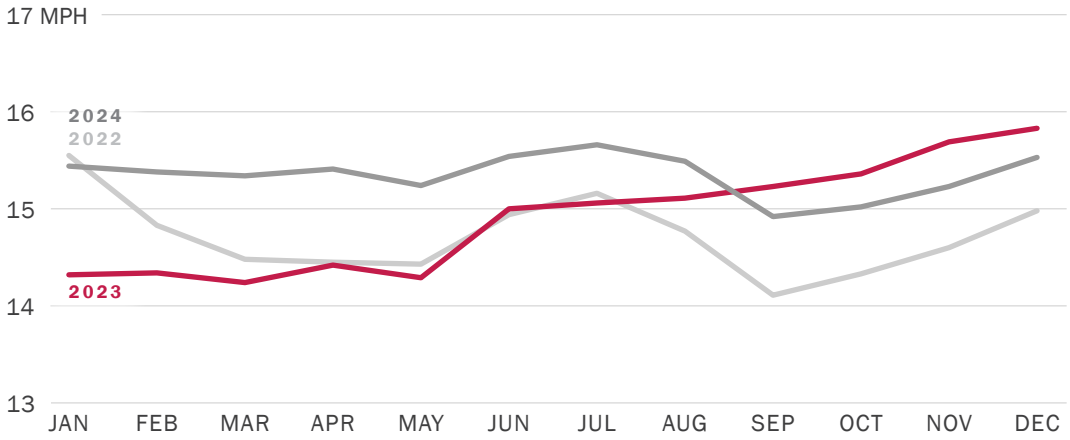
Note: Population and employment estimates are as of July 1 of each year
Population Source: US Census Population and Housing Unit;
Employment Source: California Employment Development Department Current Employment Statistics
Download chart data (CSV)

ROADWAY MONITORING RESULTS

Fall 2023 Data Anomaly and Change to Methodology

Traffic speeds vary seasonally, with lower speeds in the spring and fall, and higher speeds in the summer and winter during holidays and school closures. The CMP accounts for this seasonality by monitoring speeds in the same months, April and May, of each year. Speeds during 2020 and 2021 followed unique patterns due to the Covid 19 pandemic, but typical seasonality was evident again in 2022. From 2022 to 2025 so far, each year has exhibited normal seasonal trends. However, in August and September of 2023, when speeds typically decline from summer highs, INRIX data showed speeds continuing to increase. Staff could not identify any events that would explain a significant two-month long deviation in typical seasonal speed trends and believe there is an error in the underlying data or change in data processing methods, although INRIX has not confirmed this. After this unexplained increase in speeds data resumed typical seasonal patterns, although at elevated speeds. This resulted in higher peak period traffic speeds in 2025 than in 2023, which is an unintuitive trend that is not supported by contemporaneous arterial traffic counts in 2023 and 2025. As a result, the following analysis compares 2025 data to 2024 rather than data from the previous 2023 cycle, as would be typical.

Figure 0-2. INRIX Arterial Speeds by Month, 8 – 9 a.m.

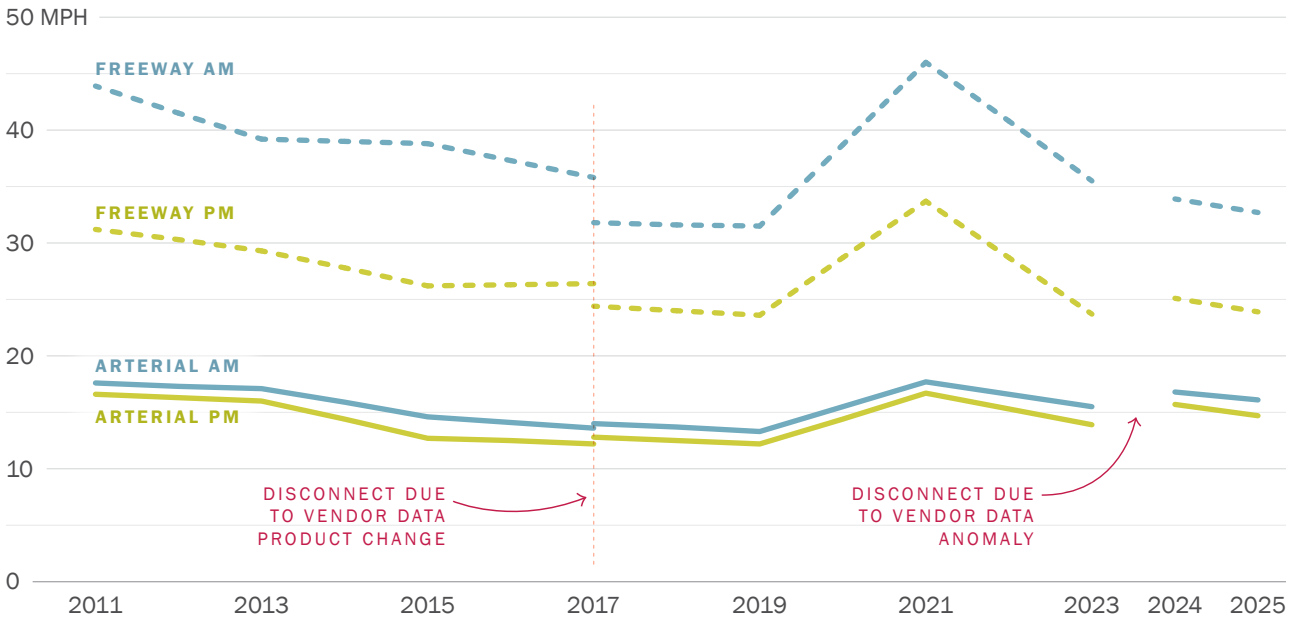


Download chart data (CSV)

Roadway Speeds

In general, roadway speeds are lower during the PM Peak than in the AM Peak, conforming to long-time historical trends. Roadway speeds increased in 2021 during the COVID pandemic, then decreased between 2021 and 2023 as people began to return to pre-COVID pandemic activity levels. The trend in speeds from 2023 to 2024 is unknown due to the anomaly described above. From 2024 to 2025 Freeway AM Peak speeds decreased by 4% and PM Peak speeds decreased 6%. Arterial speeds decreased by 4% in both the AM Peak and PM Peak between 2024 and 2025 (Figure 0-3).

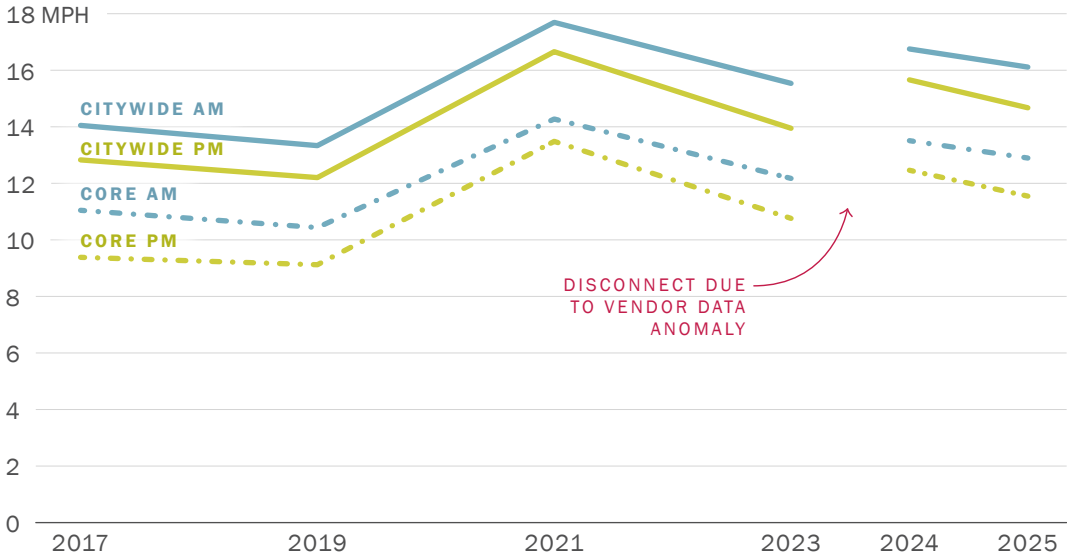
Figure 0-3. CMP Network Average Travel Speed



Note: data collected April – May each year
Download chart data (CSV)

Arterial roadway speeds in the downtown core are historically lower than citywide average arterial speeds. Between 2024 and 2025, arterial speeds in the downtown core declined by 6% in the AM Peak and 7% in the PM Peak, a faster rate of decline than citywide arterial speeds (Figure 4-3)

Figure 0-4. CMP Arterial Average Speeds Citywide and in the Downtown Core[1]



Note: data collected April – May each year
Download chart data (CSV)

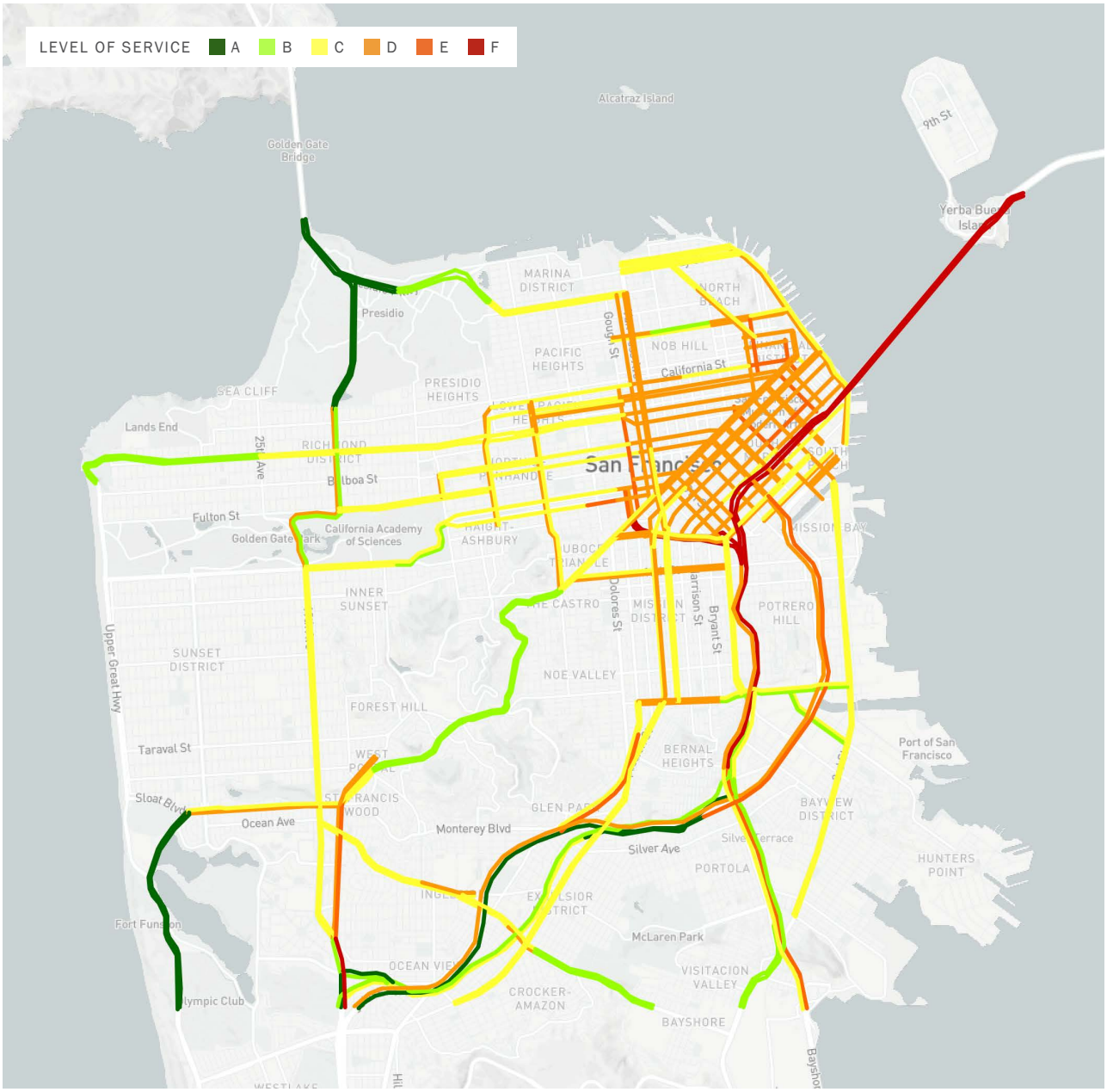
ROADWAY LEVEL OF SERVICE (LOS)

The CMP legislation defines roadway performance primarily by using the LOS traffic engineering concept to evaluate the operating conditions on a roadway. LOS describes operating conditions on a scale of A to F, with "A" describing free flow, and "F" describing bumper-to-bumper conditions.

Figure 0-5 shows PM Peak LOS in 2025. Freeways approaching and traversing the downtown core are congested, with LOS ranging from D and F. The southern leg of US-101 and I-280, further from the downtown core, are less congested, with LOS ranging from A to D. Arterials in downtown are nearly uniformly LOS D, while arterials outside of the core perform better and have more variability, ranging from A to D. The AM Peak shows similar trends. As noted in the Downtown Travel Study, this profile of traffic congestion lies within a context of a fluid downtown recovery. An interactive version of this map that allows users to view historical trends for the City overall, as well as for all the individual CMP segments, can be found at cmp.sfcta.org.

1 Downtown Core in this figure is defined to include streets east of Franklin/Gough Streets, and north of the Central Freeway and Mission Creek. It also includes the streets immediately surrounding the Octavia Boulevard entrance/exit of the Central Freeway

Figure 0-5. 2025 PM Peak Roadway Level-of-Service



ROADWAY TRAVEL TIME RELIABILITY

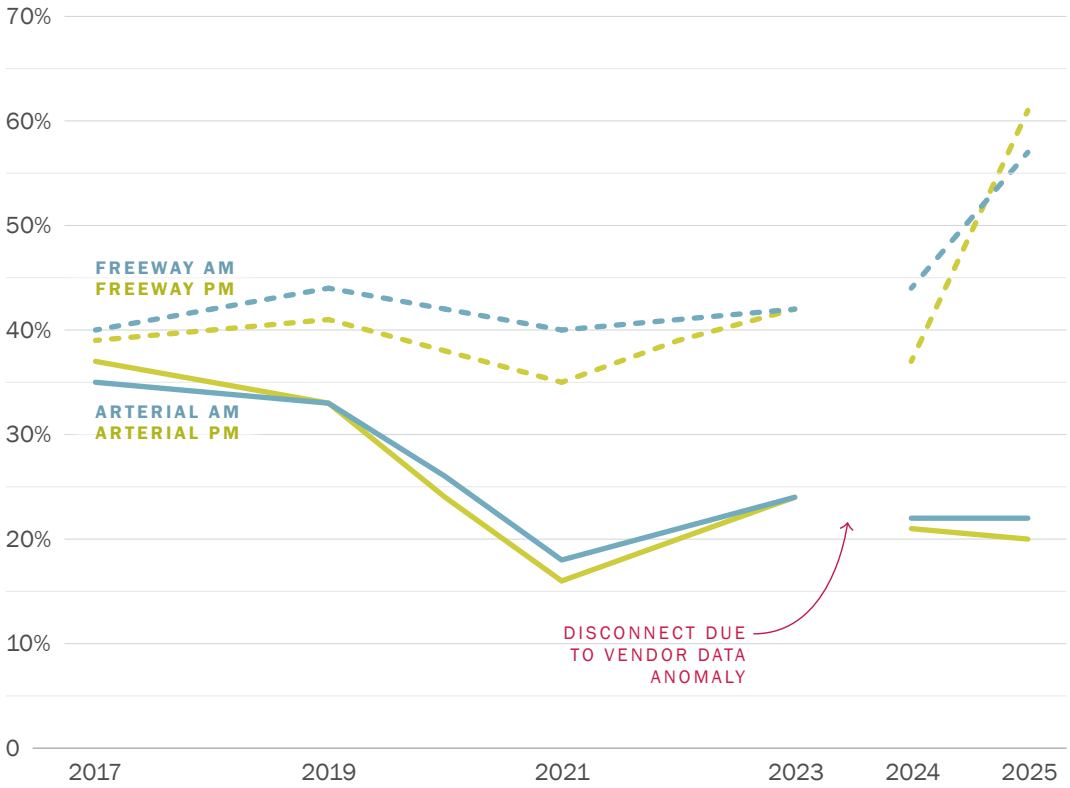
While the average travel speeds and LOS provide useful insights into congestion, they do not capture a critical aspect of peoples' perception of congestion, which is the reliability of travel times. For example, a traveler is likely to perceive the congestion on a roadway where the travel is always 15 minutes differently that they perceive the congestion on a roadway where half the time the travel time is 5 minutes and the other half the time the travel time is 25 minutes. The unreliability of the travel time on this

second roadway is onerous because it forces travelers to change their schedule so as to ensure that they aren't late to their destinations.

The Buffer Time Index (BTI) is a measure of the unreliability of vehicular travel time, and is calculated as the percent of average additional travel time that the travelers need to budget so that they have a 95% chance of arriving on time. In other words, it is the extra time needed if one does not want to be late more than once a month, and a lower value of BTI indicates higher reliability (see below for a parallel measure for transit travel). For example, a BTI of 20% for a 10 minute trip requires a traveler to budget an extra 2 minutes to not be late more than once a month.

Between 2024 and 2025 reliability remained flat on CMP network arterials, with the BTI remaining at 22% in the AM Peak and decreasing 21% to 20% in the PM Peak (a slight improvement in reliability). In contrast, freeway travel time reliability worsened significantly over the same period from 44% to 57% in the AM Peak and from 37% to 61% in the PM Peak (Figure 0-6), indicating a rising need to manage freeway demand (see San Francisco Freeway Management Study, underway).

Figure 0-6. CMP Network Average Travel Time Reliability, as Shown by Buffer Time Index (BTI)

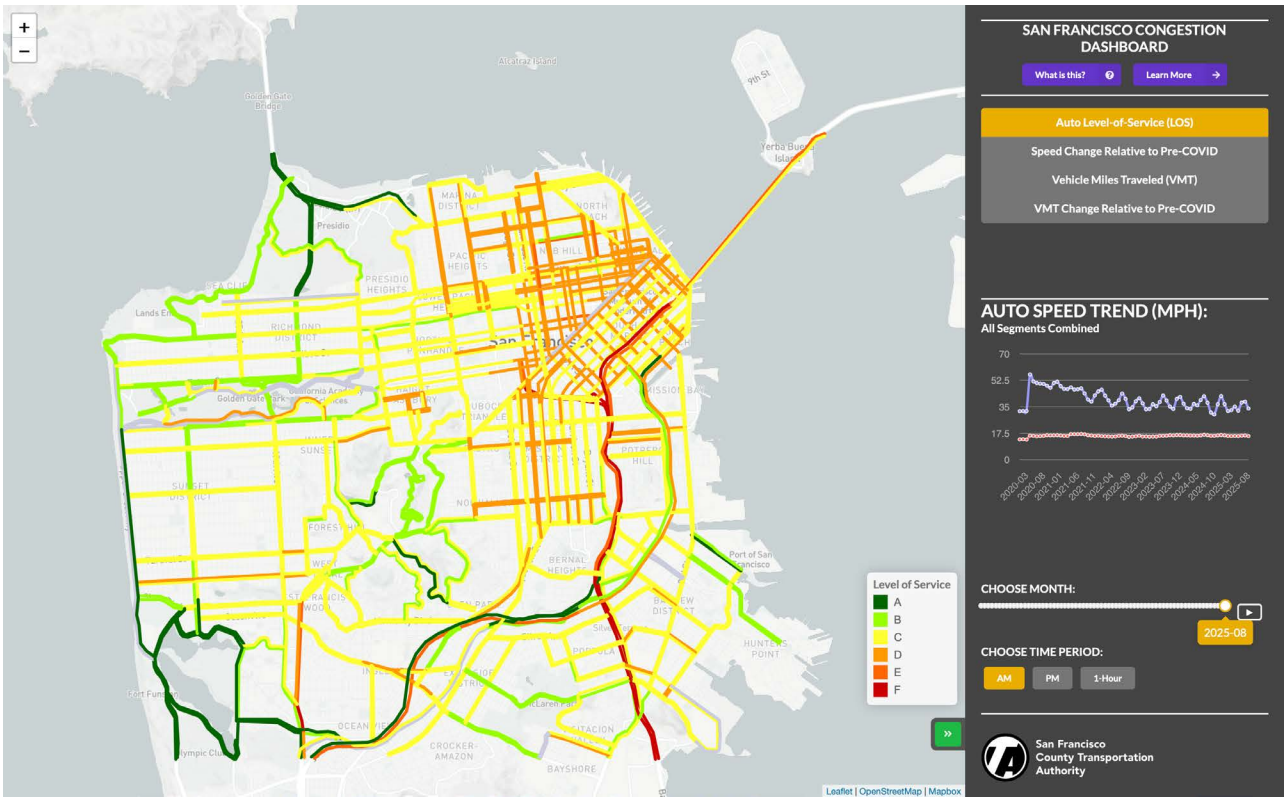


Note: data collected April – May each year
Download chart data (CSV)

SAN FRANCISCO CONGESTION DASHBOARD

The Transportation Authority maintains the San Francisco Congestion Dashboard (congestion.sfcta.org), shown in Figure 0-7. This tool reports many of the same roadway performance metrics as reported the CMP congestion visualization, but with a much greater frequency (monthly instead of biennially), for a larger set of roadway segments, and at an hourly level as well as for the AM Peak and PM Peak periods starting in January 2020.

Figure 0-7. San Francisco Congestion Dashboard

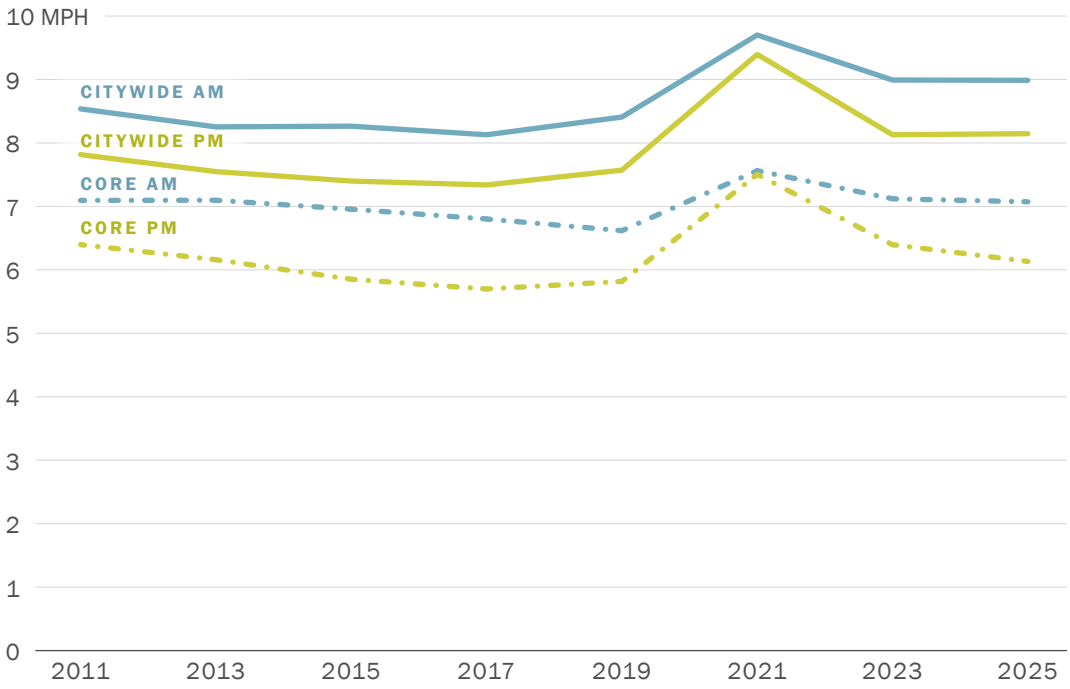


Transit Monitoring Results

TRANSIT SPEEDS (MUNI BUS)

Average transit travel speeds on the CMP network for both the AM Peak and PM Peak stayed constant between 2023 and 2025, a positive outcome, given the rise in vehicle traffic and multimodal activity over this period. Transit speeds in 2025 are still higher than that during pre-COVID (Figure 0-8).

Figure 0-8. CMP Network Average Transit Speeds[1]



Download chart data (CSV)

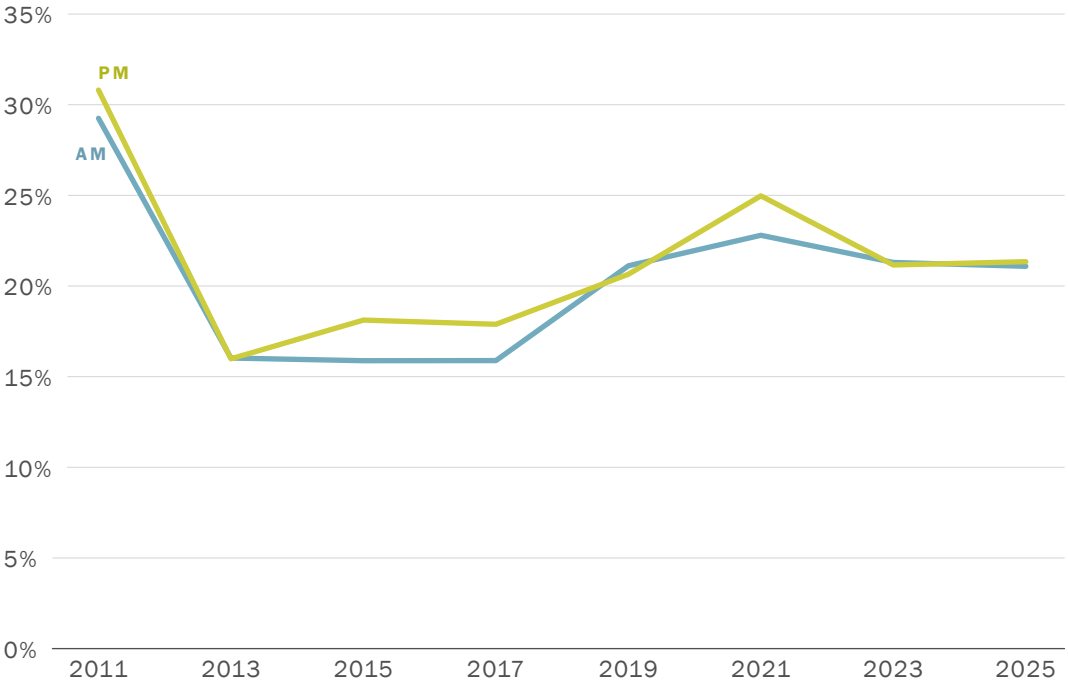
Transit Speed Reliability (Muni bus)

Transit (Muni bus) speed information is also used to calculate the coefficient of variation (CV) of speed as a measure of transit speed reliability. The coefficient of variation is calculated by dividing the standard deviation of the speed by the average speed, thereby normalizing the results to compare relative variability between faster and slower segments. The CV is expressed as a percentage of the mean speed. A lower percentage indicates more reliable transit speeds.

Transit reliability has stabilized (i.e. variability stayed the same) since 2023, staying at the same levels (21%) observed in 2019 and 2023 for both the AM Peak and PM Peak (Figure 0-9). With the average transit speeds in 2025 at 9.0 MPH (AM Peak) and 8.1 MPH (PM Peak), a CV of 21% means that approximately 70% of the time, a 3 mile transit trip would take between 15.8 and 24.2 minutes for the AM Peak, and between 17.6 and 26.9 minutes for the PM Peak. As with transit travel times, this is a positive trend and may reflect benefits from a variety of transit priority investments and traffic management strategies that were implemented during this time.

1 Downtown Core in this figure is defined to include streets east of Franklin/Gough Streets, and north of the Central Freeway and Mission Creek. It also includes the streets immediately surrounding the Octavia Boulevard entrance/exit of the Central Freeway

Figure 0-9. CMP Network Transit Travel Time Variability



Download chart data (CSV)

Auto-Transit Speed Ratio

In order to assess the competitiveness of transit with driving, the ratio of auto to transit speeds is calculated by comparing auto to transit speeds on the portions of the CMP network for which Muni bus data is available. A ratio of 2 would indicate that, for a particular segment, auto speeds are twice as fast as transit speeds. The ratio had been improving between 2013 and 2019, worsened during the COVID pandemic and has been hovering around 1.7 – 1.8 since 2021. In 2025, the auto-to-transit speed ratio was 1.8 in the AM Peak and PM Peak periods. Due to the Fall 2023 data anomaly, the auto-to-transit speed ratio for 2025 cannot be directly compared to 2023.

MULTIMODAL COUNTS

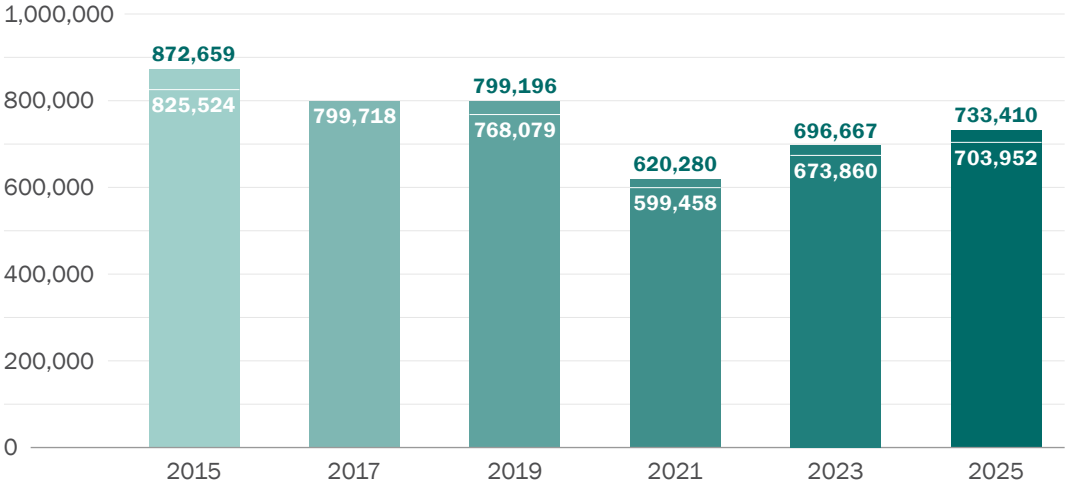
The City and County of San Francisco has placed a high priority on supporting walking and cycling/rolling modes (including bicycling, bike share and shuttles) to facilitate active and affordable means of travel. Multimodal counts have been collected at 29 mid-block locations (vehicle only) (Figure 0-10 and Figure 0-11) and 14 intersections (vehicle, bicycle (Figure 0-12), and pedestrian (Figure 0-13) since 2015.

Vehicle Volumes

Mid-block mid-week average daily traffic continued to increase between 2023 and 2025 (+4%), reaching 92% of pre-COVID pandemic (2019) levels (Figure 0-10). The 2025 AM Peak and PM Peak mid-block mid-week vehicle counts stand at 88% and 92% of 2019 (pre-COVID

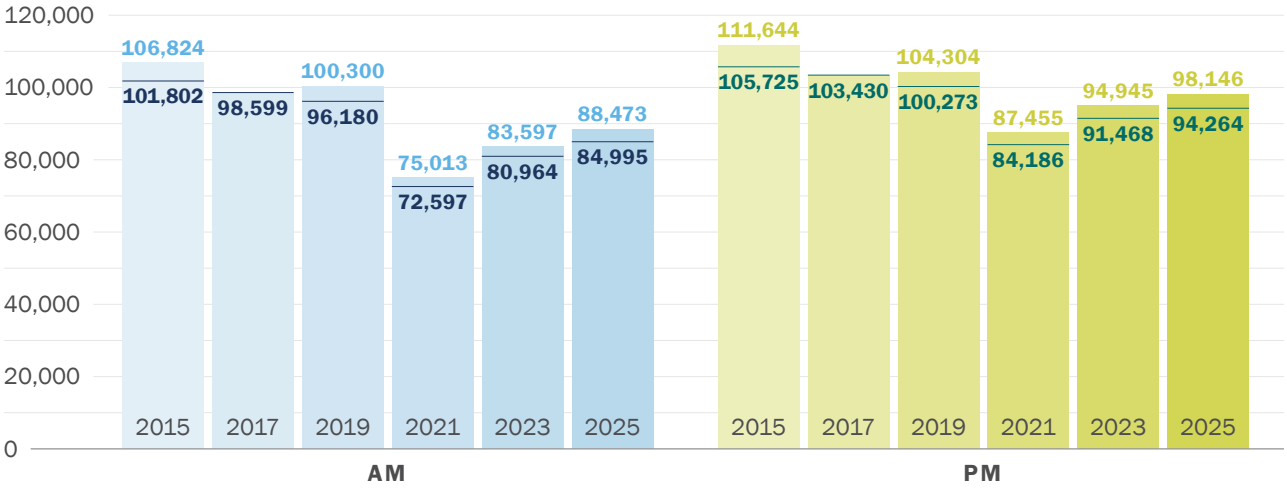
pandemic) levels, respectively. The trendlines may also suggest that the ongoing vehicular traffic decrease observed from 2015 to 2019 is continuing past the COVID pandemic.[1]

Figure 0-10. Mid-Block Mid-week (Tue/Wed/Thu) Average Daily Traffic (ADT)



Note: Data collected April – May biennially at the same locations, counts shown for the bars are summed over all 29 locations and directions, whereas the white line within each bar only shows counts summed over 28 locations and directions (excluding counts from Van Ness between California and Pine, where no data were collected in 2017).
Download chart data (CSV)

Figure 0-11. Mid-Block Mid-week (Tue/Wed/Thu) Average AM/PM Peak Traffic Counts



Note: Data collected April – May biennially at the same locations, counts shown for the columns are summed over all 29 locations and directions, whereas the line within each column only shows counts summed over 28 locations and directions (excluding counts from Van Ness between California and Pine, where no data were collected in 2017).
Download chart data (CSV)

1 A data error in 2023 midblock traffic counts was discovered that resulted in lower AM Peak period counts. This error is corrected in the 2025 CMP.

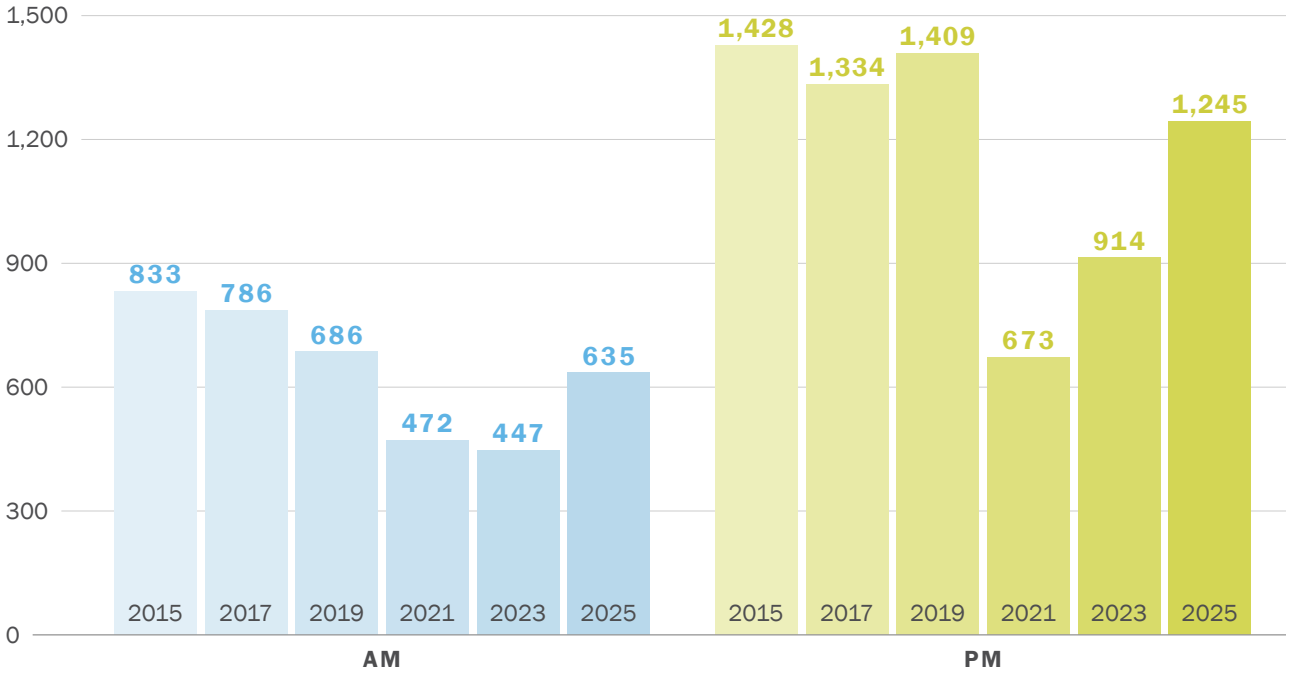
Bicycle and Pedestrian Volumes

Figure 0-12 and Figure 0-13 respectively show bicycle and pedestrian counts collected by SFCTA between 2015 and 2025 throughout the city. In contrast to vehicle counts, bicycle and pedestrian intersection counts show a stronger recovery in the PM Peak than the AM Peak. Bicycle counts showed a particularly strong increase between 2023 and 2025 of +42% for the AM Peak and +36% for the PM Peak. Pedestrian counts saw more modest changes between 2023 and 2025, with AM Peak counts basically unchanged (+0%), and PM Peak counts increasing +8%.

AM Peak vs PM Peak Travel

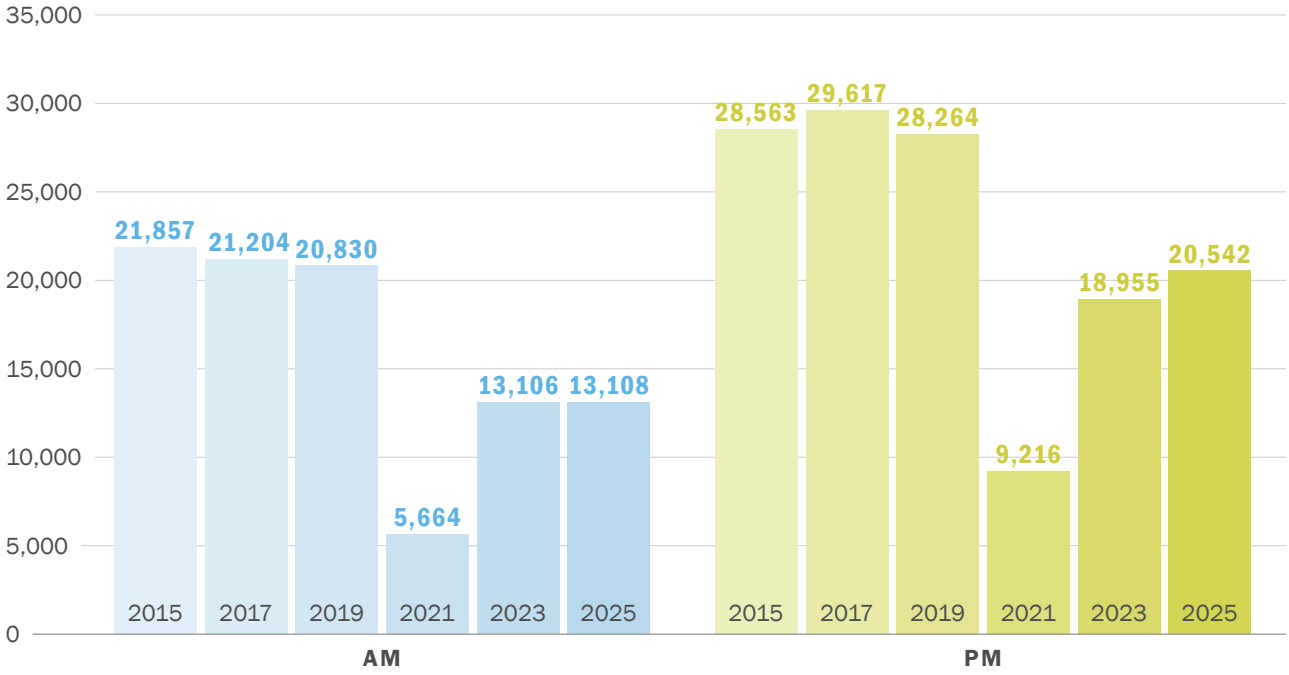
Taken together, travel in the PM Peak (4:30 – 6:30 p.m.) seems to show a slight mode shift from automobiles to bicycles and walking. This shift away from automobiles is not observed in the AM Peak (7:00 – 9:00 a.m.) however.

Figure 0-12. Intersection Single-Day Bicycle Counts



Note: Data collected April – May biennially at the same locations, counts shown are summed over all locations.
Download chart data (CSV)

Figure 0-13. Intersection Pedestrian Counts



Note: Data collected April – May biennially at the same locations, counts shown are summed over all locations.
Download chart data (CSV)

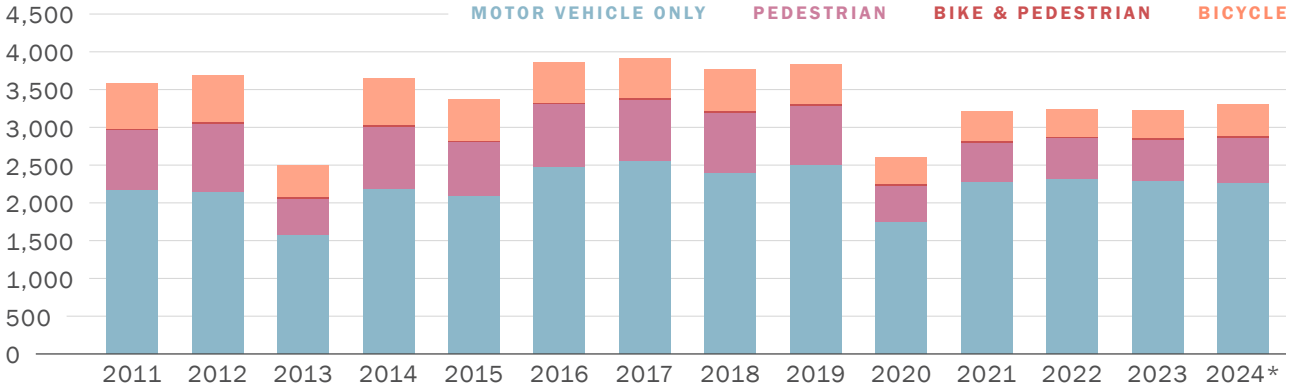
TRAFFIC SAFETY

Safety for road users, including those walking or biking, are key measures of transportation performance, and a critical policy priority for San Francisco. The City and County of San Francisco adopted Vision Zero as a policy in 2014, committing to build better and safer streets, educate the public on traffic safety, enforce traffic laws, and adopt policy changes that save lives. The San Francisco Street Safety Act (July 2025) re-affirmed San Francisco's commitment to traffic safety and identified specific activities across city agencies to advance the city's goals.

The number of injury collisions (involving people walking or biking) dropped significantly in 2020, probably due to the substantial reduction in vehicle and non-motorized volumes in 2020 due to the COVID pandemic. Speeding remains a top collision factor and concern during this time, among the "Focus on the 5" priorities for SFMTA counter-measure and San Francisco Police Department traffic enforcement efforts. The number of property-damage only (PDO) collisions, non-severe injury collisions, and severe injury collisions have increased from 2020 lows, but remain mostly stable below pre-pandemic highs as of 2024 (Figure 0-14). The total number of fatal collisions in 2024 at 42 (of which 23 and 3 involved people walking and biking, respectively), however, is the highest observed since 2011 (other than 2022 which has the same number of fatal collisions) (Figure 0-15). Total fatalities also increased to their highest level observed since 2011, reaching 48

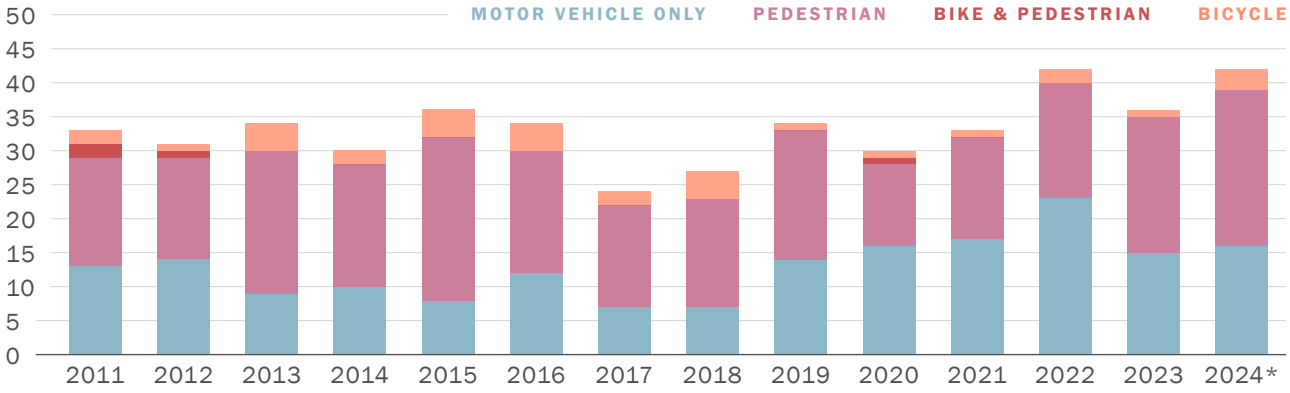
(Figure 0-16). These totals are higher than those reported through San Francisco's Vision Zero program, which exclude fatalities that occur on freeways.

Figure 0-14. Injury Collisions by Party Type Involved in San Francisco



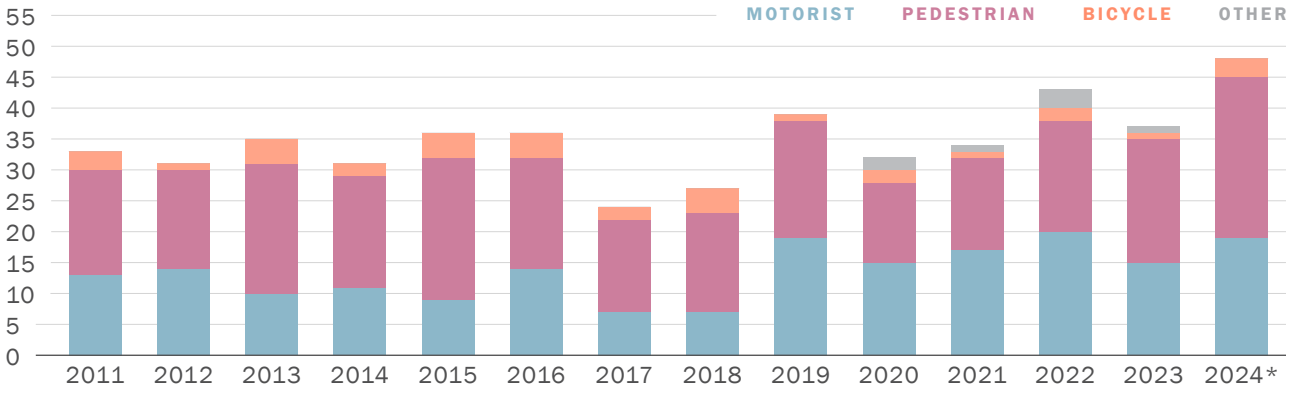
* provisional data.
Download chart data (CSV)

Figure 0-15. Fatal Collisions by Party Type Involved in San Francisco



* provisional data.
Download chart data (CSV)

Figure 0-16. Collision Fatalities by Party Type in San Francisco

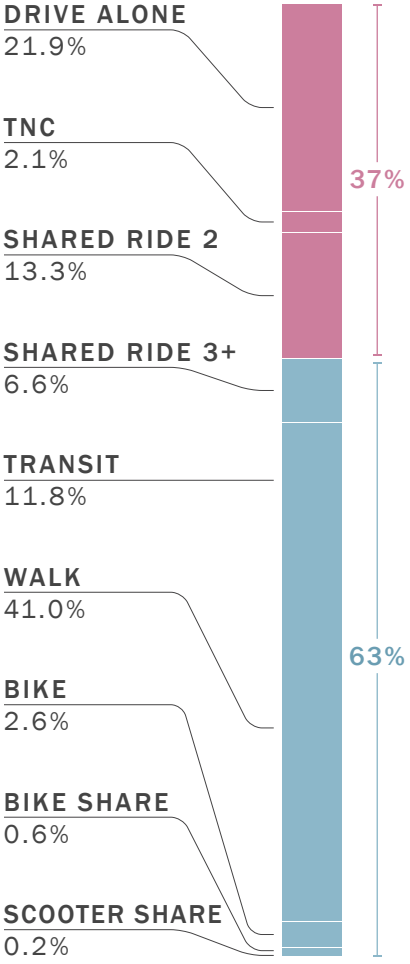


* provisional data.
Download chart data (CSV)

Mode Share

Mode share describes the mix of modes, such as transit, biking, walking, and driving used to travel to, from, and within San Francisco. Figure 0-17, Figure 0-18, and Figure 0-19 summarize the share of trips by mode for trips in San Francisco broken down into three different travel markets: all trips to/from/within San Francisco, regional trips to/from San Francisco (trips where one of the trip ends is in San Francisco and the other is not), and trips within San Francisco (trips that both start and end in San Francisco). Driving (alone, sharing a ride, or using a TNC) is the most prevalent mode to both get around within San Francisco (43.9%) and to travel to/from San Francisco (76.3%). For travel within San Francisco, walking is the next most prevalent mode (41.0%). There is also a significant transit share for both travel markets (11.8% for trips within San Francisco, and 21.9% for trips to/from San Francisco).

Figure 0-17. Mode Split for Person Trips Within San Francisco



Download chart data (CSV)

Figure 0-18. Mode Split for Regional Person Trips To/From San Francisco

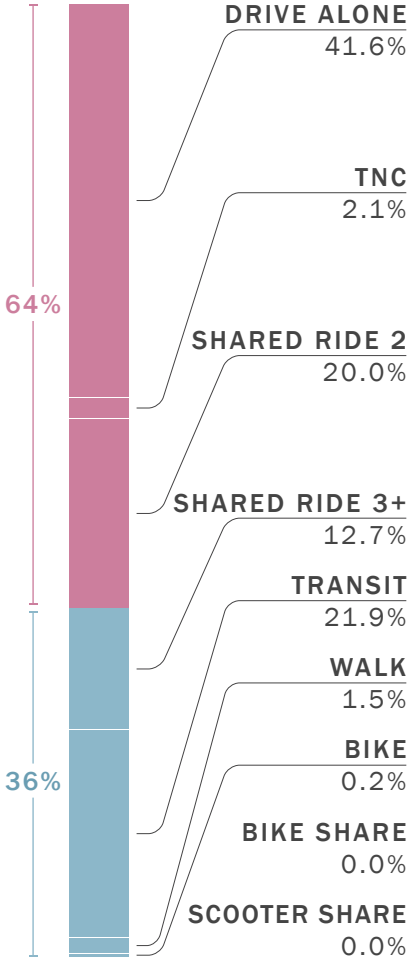
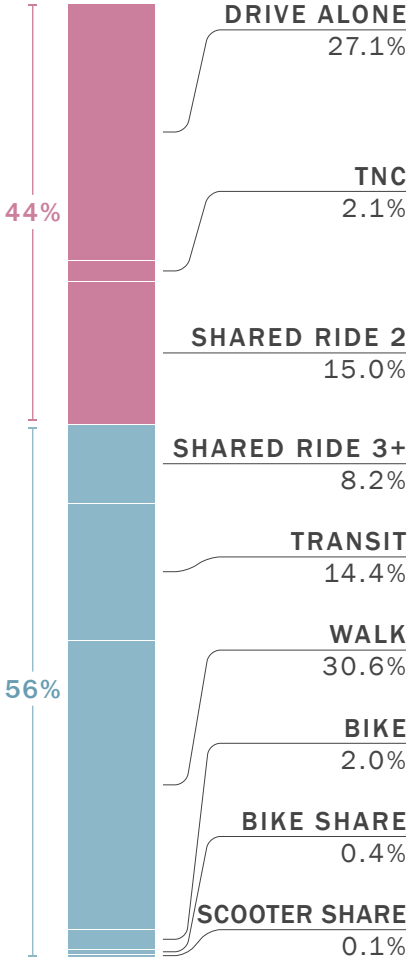


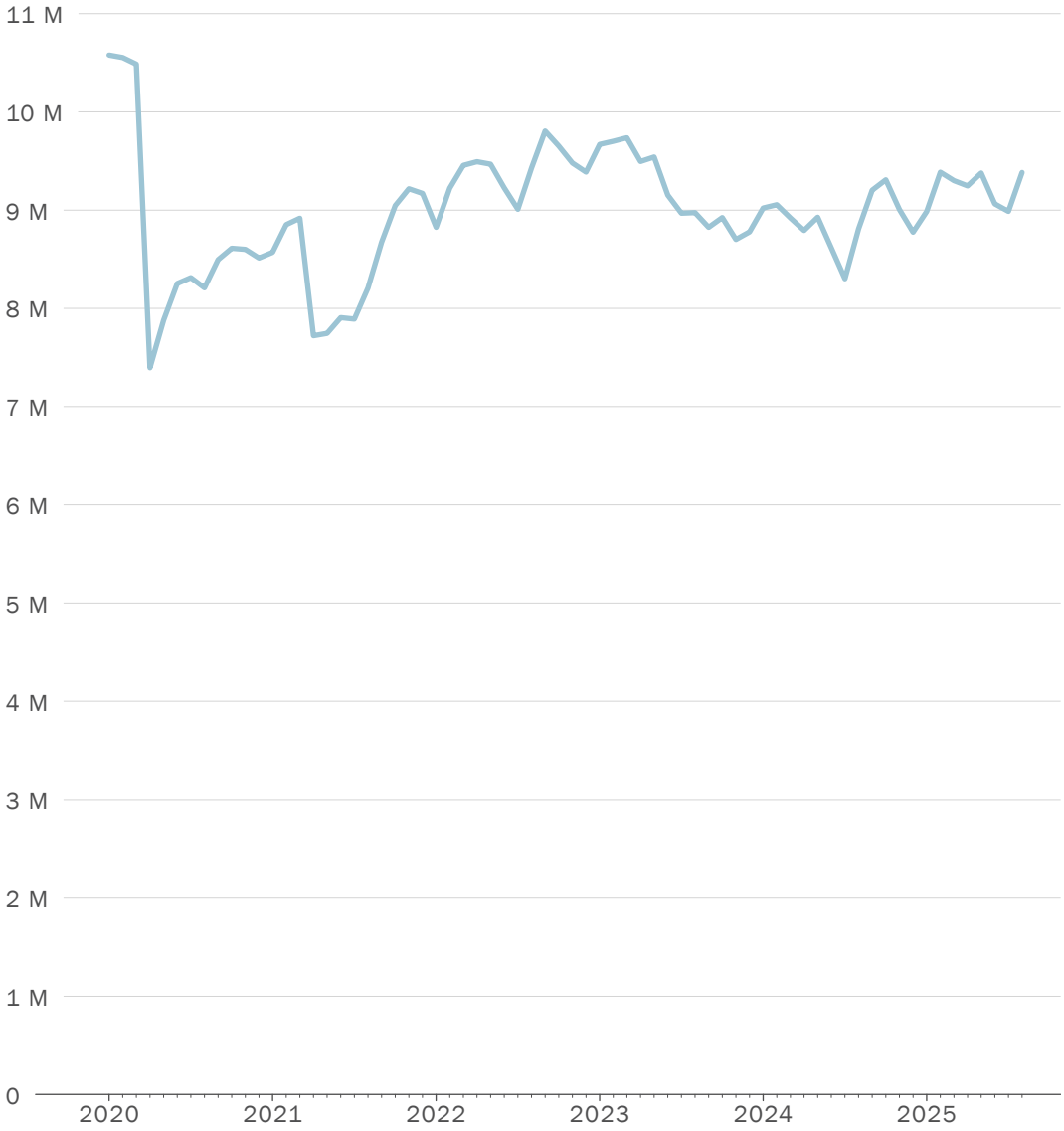
Figure 0-19. Combined mode split for Person Trips To/From/Within San Francisco



Vehicle Miles Traveled (VMT)

In 2016, the San Francisco Planning Commission adopted new guidelines for evaluating the transportation impacts of new projects. Critically, environmental impact determinations locally and statewide are now based on vehicle miles traveled (VMT) rather than additional automobile delay as measured by level-of-service (LOS). VMT decreased by 20 – 30% in the first 1.5 years of the COVID pandemic. As of 2025, VMT is hovering at around 10% below pre-COVID levels (Figure 0-20).

Figure 0-20. Daily Vehicle Miles Traveled in San Francisco

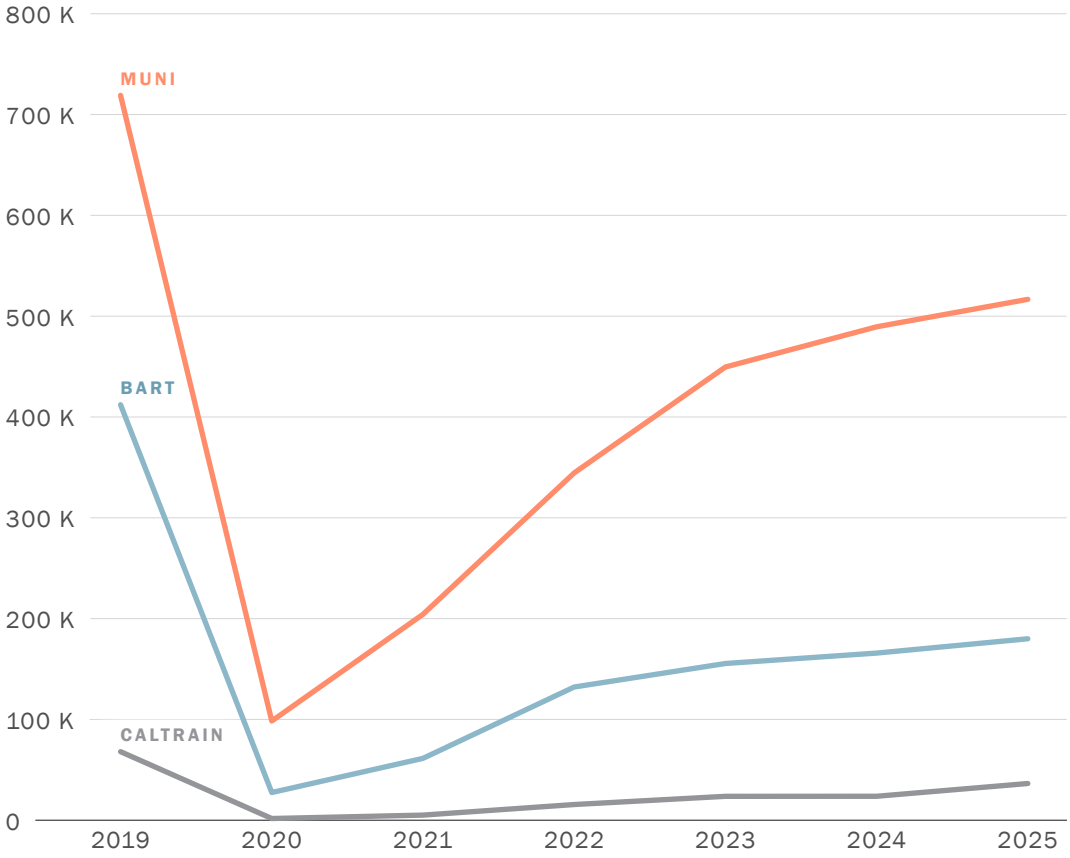


Source: The Transportation Authority, based on INRIX automobile speed data
Download chart data (CSV)

Transit Ridership

San Francisco's strong backbone of local and regional transit has been key to our ability to manage congestion. Muni, BART, Caltrain, and commuter bus lines help move people into, out of, and around the city efficiently. Figure 0-21 shows recent ridership trends for the three largest transit systems serving San Francisco. Muni carries the greatest number of trips in San Francisco, with over 500,000 trips on a typical April – May weekday in 2025. Ridership on all three operators declined significantly with the spread of COVID in 2020. Since then, ridership has been gradually increasing every year, but in Apr – May 2025 ridership is still lower than pre-COVID pandemic levels, with Muni, BART, and Caltrain at 72%, 44%, and 54% of 2019 (pre-COVID pandemic) ridership respectively. As of October 2025 (for Muni and Caltrain) and June 2025 (for BART), ridership has further recovered to 82%, 48%, and 62% of pre-pandemic ridership for Muni, BART, and Caltrain, respectively.

Figure 0-21. Average Weekday Daily Transit Boardings by Operator (April – May of each year)

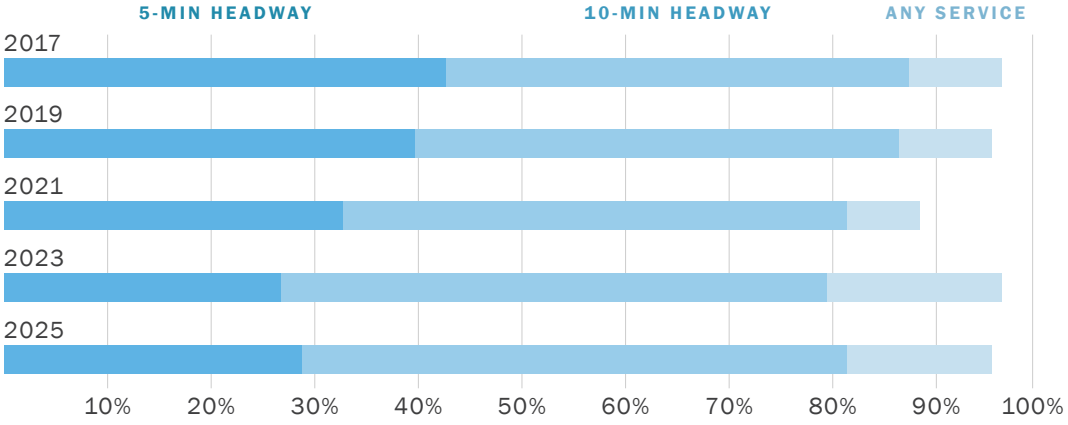


Source: SFMTA/BART/Caltrain
Note: data collected April – May each year except for Caltrain it is February
Download chart data (CSV)

Transit Coverage

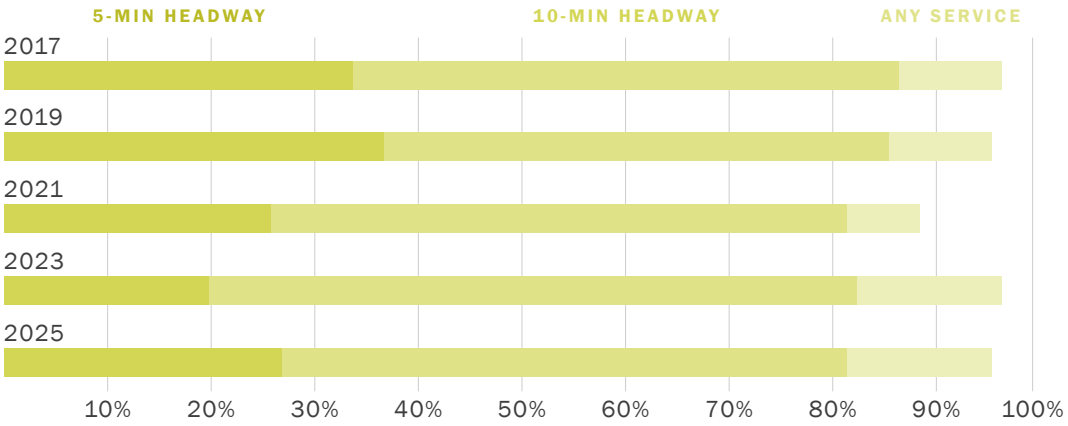
The transit coverage metric reports the percent of San Francisco's total population and total jobs that are within a five-minute walk of Muni transit service. Since 2023, more than 95% of San Francisco residents live within a five-minute walk of Muni service. Moreover, the share of the population within a five-minute walk of a Muni route with a five-minute headway increased from 27% in 2023 to 29% in 2025 for the AM Peak and from 20% in 2023 to 27% in 2025 for the PM Peak, though this is still lower than the pre-COVID population share within a five-minute walk of a Muni route with a five-minute headway (Figure 0-22 and Figure 0-23). Transit coverage in terms of jobs for both the AM Peak and PM Peak periods show trends similar to those observed in population transit coverage.

Figure 0-22. Population Transit Coverage by Service Frequency, Weekday AM Peak, 2017 – 2025



Download chart data (CSV)

Figure 0-23. Population Transit Coverage by Service Frequency, Weekday PM Peak, 2017 – 2025



Download chart data (CSV)

What are we doing to manage congestion?

The Transportation Authority is analyzing current conditions and conducting long-range planning to manage congestion. The Downtown Travel Study analyzed post-COVID residential travel trends (March 2025) and the countywide transportation plan update is occurring through the San Francisco Transportation Plan 2050+ study process. Planning, funding, project delivery and policy research efforts are described further below:

TRAVEL DEMAND MANAGEMENT (TDM)

The San Francisco Transportation Plan 2050 (SFTP2050) recommends TDM to maximize our countywide infrastructure investment priorities and to reduce congestion by shifting more trips from driving alone to walking, bicycling/rolling, transit, or carpooling. TDM may include policies, low-cost capital improvements, regulations (e.g., requirements on new development), and programs (e.g., information/outreach) designed to facilitate the use of sustainable transportation options.

San Francisco has identified a travel demand management (TDM) policy framework, strategy, and programs to systematically shift how, when, and where people travel, as documented in the 2017 San Francisco TDM Strategy. The Transportation Authority, in partnership with SFMTA and other local and regional agencies involved in TDM, is revising the 2017 TDM Strategy for the post-COVID era. This revision will build off of the Travel Demand Management (TDM) Market Analysis project that SFCTA is currently leading.

As the Treasure Island Mobility Management Agency, the Transportation Authority is leading a comprehensive mobility management program that encompasses new transit service and robust transportation demand management programs. Furthermore, San Francisco is encouraging efficient land use planning by supporting development at higher densities in areas that are mixed-use (closer to jobs and retail) and are well served by transit. Plan Bay Area 2050 identifies Priority Development Areas (PDAs) where densities and transit levels can more readily support transit-oriented development.

PLANNING PROJECTS

From 2016 – 2022, Connect SF was a multiagency collaborative process to build an effective, safe, equitable, and sustainable transportation system for San Francisco's future. ConnectSF developed a long-range vision for 2065 that serves as the underpinning of Plan Bay Area 2050+ and SFTP 2050+. The Transportation Authority is also coordinating with numerous local, regional state and Federal agencies and with the private sector to address congestion. Key initiatives include:

- San Francisco Transportation Plan, currently undergoing a minor update expected 2026 (SFTP+)
- San Francisco Freeway Management Study (Phase 1 anticipated Summer 2026)

- Treasure Island Mobility Management Program
- Inner Sunset Transportation Study
- D2 Safety Study
- D4 Microtransit Study and Business Plan
- Bayview Caltrain Station Location Study
- Westside Network Study
- Brotherhood Way Safety and Circulation Plan
- Geary/19th Subway and Regional Connections Study

FUNDING AND DELIVERING PROJECTS

The Transportation Authority is addressing near- and long-term transportation needs for San Francisco by funding projects and programs – mainly capital infrastructure, through grant programs such as the Proposition L transportation sales tax, Proposition AA vehicle registration fee, Prop D Traffic Congestion Mitigation Tax (TNC Tax), Transportation Fund for Clean Air, and One Bay Area Grants (OBAG) programs, as well as coordinating with other local and regional agencies to apply for State and Federal funding to match local investments. Below are a few signature projects supported with Transportation Authority funds:

- Muni New and Renovated Vehicles
- The Portal / Caltrain Downtown Extension to Salesforce Transit Center
- Peninsula Corridor Electrification Project
- BART and Muni core capacity
- Vision Zero / Safety Projects

The Transportation Authority is also overseeing and leading the delivery of key projects, many of which support infill transit-oriented development, including serving as co-sponsor or lead agency for the construction of:

- Bay Skyway/Yerba Buena Island Multi-Use Pathway (lead)
- I-280 Southbound Ocean Avenue Off-Ramp Realignment (lead)
- Hillcrest Road Improvement Project (lead)
- West Side Bridges Retrofit (lead)

AUTONOMOUS VEHICLES

While the CMP's focus is primarily on monitoring multimodal system performance and managing current congestion, the City must also plan for future system performance

and congestion. San Francisco is a dense urban environment, and a critical challenge is how we manage our limited public right-of-way in order to maximize the movement of people and goods. While technologies such as web conferencing enabled increased levels of working from home which may help reduce peak period congestion, other emerging technologies and mobility services may lead to increased congestion.

Over the past few years, the California Department of Motor Vehicles (DMV) and the California Public Utilities Commission (CPUC) have approved numerous permits for autonomous vehicles (AVs) to operate on San Francisco roadways, culminating in an August 2023 decision by the CPUC to allow two AV companies (Waymo and Cruise) to offer fared ride hailing services at all times of day across the entire City, with no limits on fleet size, not unlike the ride hailing services provided by Transportation Network Companies (TNCs) such as Uber and Lyft. Prior work by the Transportation Authority documented that ride hailing was responsible for approximately 50% of the increase in congestion between 2010 and 2016. As AVs scale up and become more widely deployed, it is reasonable to expect that AV ridehail services may similarly be generating vehicle miles traveled on San Francisco's roadways and contributing to congestion in San Francisco.

The Transportation Authority, in coordination with other San Francisco agencies, have identified the need for the CPUC to move towards a performance-based incremental permitting of AVs. Such performance-based regulation, as well as the Transportation Authority's responsibility to monitor transportation system performance and the potential impact of TNCs and AVs on congestion and other performance metrics such as safety, requires that agencies such as the CPUC and the Transportation Authority have access to useful, timely, reliable, and unredacted data. Unfortunately, at present, the data reported to the DMV and CPUC under a variety of testing, pilot, deployment, drivered and driverless permits is too incomplete, inconsistent, and redacted to provide policy-makers with the knowledge they need to make informed decisions. Without reliable data, it is challenging to facilitate safe, equitable, and sustainable integration of AVs into the City's transportation ecosystem.

What are we doing to improve safety?

The City and County of San Francisco adopted Vision Zero as a policy in 2014, committing to build better and safer streets, educate the public on traffic safety, enforce traffic laws, and adopt policy changes that save lives. The goal is to eliminate traffic fatalities and to create a culture that prioritizes traffic safety. In July 2025, the San Francisco Board of Supervisors passed the San Francisco Street Safety Act, re-affirming the city's commitments and describing a shared work program toward achievement of city goals. The Transportation Authority and the Controller's Office were charged with monitoring these actions and assessing progress on an annual basis.

A significant portion of San Francisco's arterial CMP network overlaps with its Vision Zero High Injury Network.[1] In 2025, the Board of Supervisors adopted the San Francisco Street Safety Act, directing a multiagency coordinated approach to ending severe and fatal traffic crashes.[2] The act directs agencies to pursue strategies to identify and implement infrastructure improvements, improve traffic enforcement, pursue electronic enforcement technologies like red light and speed cameras, establish procedures to implement solutions more efficiently, and prioritize solutions where they are needed most.

The Transportation Authority advances safety by:

- Integrating safety into planning work
- Prioritizing safety for funding programs, particularly for vulnerable and disadvantaged communities
- Advocating for policies and legislation that advance San Francisco's safety goals
  - » Advocated for legislation enabling use of speed cameras
  - » Provided input on AV legislation and regulatory policies at state and federal level
- Recommend and implementing proven solutions
  - » Yerba Buena Island Ramps program
  - » Vision Zero ramps Phase 1, 2 and 3 (forthcoming)

1 https://visionzerosf.org/maps-data

2 https://sfbos.org/sites/default/files/r0437-25.pdf

ATTACHMENT 2

San Francisco
County Transportation
Authority

BD120925 RESOLUTION NO. 26-XX

RESOLUTION APPROVING THE 2025 SAN FRANCISCO CONGESTION MANAGEMENT PROGRAM (CMP) AND ISSUING AN OFFICIAL FINDING THAT THE CITY AND COUNTY OF SAN FRANCISCO IS IN CONFORMANCE WITH THE CMP

WHEREAS, As the Congestion Management Agency for San Francisco, the Transportation Authority is required by state law to update the CMP on a biennial basis; and

WHEREAS, The legislative intent of state congestion management law is to tie transportation project funding decisions to measurable improvements in mobility and access, while taking into account the impacts of land use decisions on local and regional transportation systems; and

WHEREAS, The CMP has several required elements, including a designated congestion management roadway network, biennial monitoring of automobile level of service on this network, a multimodal performance element, a uniform transportation analysis database, travel demand management provisions, a land use impacts analysis program, and a multimodal capital improvement program; and

WHEREAS, The 2025 CMP update reflects developments pertaining to the Transportation Authority's Congestion Management Agency activities since 2023, including system performance data collection and analysis, transportation policy changes and initiatives at the regional and state levels, and progress of the Transportation Authority's planning and project oversight efforts; and

WHEREAS, The 2025 CMP was prepared to comply with all pertinent requirements of State law, including relevant amendments, and, by agreement with the Metropolitan Transportation Commission (MTC), to comply with implementation of portions of Federal surface transportation law; and

WHEREAS, Adoption of the 2025 CMP is essential to achieve compliance with state congestion management mandates, as well as to ensure the City's continued eligibility for various state and federal transportation funding sources; and

WHEREAS, The 2025 CMP needs to be submitted to the MTC for adoption; and

WHEREAS, At its November 19, 2025 meeting, the Community Advisory Committee was briefed on the 2025 CMP and unanimously adopted a motion of support for its approval; now, therefore, be it

RESOLVED, That the Transportation Authority hereby approves the 2025 San Francisco CMP; and be it further

RESOLVED, That the Transportation Authority hereby finds that the City and County of San Francisco is in conformance with the requirements of the CMP, pursuant to California Government Code Section 65088 et seq.; and be it further

RESOLVED, That the Executive Director is hereby authorized to prepare the document for final publication and distribute the document to the MTC for approval and to all other relevant agencies and interested parties.

Enclosure:

1. 2025 CMP