San Francisco
County Transportation
Authority

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Memorandum

AGENDA ITEM 9

DATE: November 24, 2026

TO: Transportation Authority Board

FROM: Suany Chough – Acting Deputy Director for Planning

SUBJECT: 12/08/26 Board Meeting: Adopt the San Francisco Transportation Plan 2050+

RECOMMENDATION ☐ Information ☒ Action

Adopt the San Francisco Transportation Plan (SFTP) 2050+

SUMMARY

The SFTP is the blueprint for San Francisco's transportation system development and investment over the next 30 years. It covers all surface transportation modes, networks, and operators that serve the city and establishes long term investment priorities. The SFTP contains both an Investment Plan based on the local, regional, state and federal revenues that San Francisco is anticipated to potentially receive as well as a Vision Plan which assumes additional, not-yet-identified revenues to demonstrate what further progress could be achieved toward SFTP goals if more revenues were available. The Transportation Authority Board adopted SFTP 2050 in 2022. This focused update, referred to as SFTP 2050+, analyzes key assumptions and inputs that have developed since the SFTP 2050 and then, drawing upon technical analysis and public engagement, modifies the Investment Plan and Vision Plan seeking to advance the City's goal to build an effective, equitable and sustainable transportation system. SFTP 2050+ is consistent with the Metropolitan Transportation Commission's (MTC's) /Association of Bay Area Government's (ABAG's) Plan Bay Area 2050+ (PBA 2050+), the Regional Transportation Plan and Sustainable Communities Strategy for the nine-county Bay Area adopted in March 2026.

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

BACKGROUND

As San Francisco's Congestion Management Agency, the Transportation Authority develops a long-range transportation plan to establish the City's investment priorities and guide policy initiatives in the sector. The SFTP prioritizes and recommends transportation projects and programs for anticipated local, regional, state, and federal funding, and is a tool for San Francisco's advocacy for discretionary (e.g. competitive) transportation funds, as well for new transportation revenues. In addition to investment strategies, the SFTP examines policy initiatives to help reach the City's long-range goals.

The Transportation Authority updates the SFTP about every four years in coordination with updates of Regional Transportation Plan/Sustainable Communities Strategy for the nine-county Bay Area region, alternating a major update with a more modest, focused update. The Transportation Authority adopted the last major update of the SFTP (SFTP 2050) in December 2022. SFTP 2050+ is a focused update which modifies key assumptions and inputs based on changing conditions since SFTP 2050 was approved and refines investment strategies and recommendations accordingly. As such, the focus of this update was to incorporate post-pandemic travel patterns and lowered revenue projections, and to refine SFTP 2050 investment strategies and recommendations.

Development of SFTP+ was coordinated with the development of Plan Bay Area 2050+, adopted by MTC/ABAG in March 2026. The SFTP+ incorporates data, assumptions, and guidance from PBA 2050+ as well as providing the basis for San Francisco's input to the development of PBA 2050+.

Through technical analysis and public engagement, staff evaluated how to prioritize expected revenues to advance transportation goals – equity, economic vitality, environmental sustainability, safety and livability, and accountability and engagement.

We presented the SFTP+ draft Investment and Vision Plans, including a summary of outreach findings, to the Transportation Authority Board at its April 14, 2026 meeting and to the Community Advisory Committee (CAC) at its July 22, 2026 meeting.

DISCUSSION

Achieving San Francisco's transportation goals of equity, economic vitality, environmental sustainability, safety and livability, and accountability and engagement will require sustained investment coupled with supportive policy actions. SFTP+

establishes a fiscally constrained Investment Plan that directs anticipated revenues toward maintaining, operating, and improving the transportation system while advancing the City's long-term priorities.

Changed Travel Patterns. A primary motive for this focused update is the change in travel patterns post-pandemic, and updated travel projections for the future. SFTP 2050+ was developed during unprecedented times when travel behaviors, San Francisco's transit network, and the transportation funding ecosystem all changed because of the pandemic. Since SFTP 2050 was adopted in 2022, congestion has returned and now rivals 2019 levels in some areas.

Based on data from MTC's Bay Area Travel Study, the overall number of weekday trips made to, from, and within San Francisco decreased by 41% (1.9 million fewer trips) in 2023 compared to 2019. A key factor driving this change is the number of people working from home: in 2023, 42% of employed residents of San Francisco worked from home on a typical weekday, compared to 13% in 2019. Twenty-four percent of employed San Francisco residents worked fully from home. Another key finding is that while people are traveling less, when they do move around, they are more likely to drive than to take transit or walk; this trend is concerning for the shared goals of economic vitality, environmental sustainability, safety and livability, and equity.

Lower Transportation Revenues. The SFTP+ Investment Plan estimates that San Francisco will see $69 billion in transportation funding (in 2020 dollars) over the thirty years of the plan. Based on regional forecasts, projected revenues are about 12% lower in SFTP+ than in SFTP 2050. Federal, state, and regional funding projections are about the same as the prior SFTP. However, significant reductions are expected in local sources, driven by changes in remote work and the economic downturn triggered by the pandemic: transit fare and parking revenues as well as general fund and sales tax proceeds dedicated to transportation investments are all lower. Consistent with regional assumptions made under PBA 2050+, SFTP+ revenue projections assume new funding would be secured early in the plan period to maintain transit service at current levels, such as through passage of the November 2026 transit revenue measures and other sources. Due to that assumption, the 12% decline remains in the forecast despite recent ballot wins.

Most of the revenue anticipated to be available to San Francisco during the SFTP+ period - about 80% - is already committed to specific projects or purposes. The remainder of the expected revenues are discretionary, meaning that there is

flexibility in how they can be invested to improve the transportation system. SFTP+ captures these commitments and, through the Investment Plan, proposes how to invest the discretionary revenues most effectively to make progress toward our goals.

Outreach. To inform the planning process, we engaged with communities in two phases to gather input on their priorities for transportation investments. In each round we gathered feedback via an online survey, presentations to community groups, virtual public town halls, and roundtable discussions. We also built upon recent and concurrent planning efforts such as the West Side Network Study. In Summer 2025 we presented major changes in travel patterns and revenue projections to the CAC and Board.

During SFTP+ outreach, public input consistently emphasized the importance of stable and reliable transit and safer streets. Within the context of limited revenues for the Investment Plan, a clear majority of outreach participants and survey respondents were supportive of maintaining transit operations and enhancing and expanding transit more generally. Safety, both safety on the street and personal security, was also a priority. Respondents expressed mixed opinions on private vehicle travel, where some wished to prioritize driving for daily trips while others favored investing in alternatives to driving.

The priorities reflected in the SFTP+ investment and policy recommendations are informed by both technical analysis and community feedback, ensuring that the plan responds to the transportation needs and values expressed by San Franciscans.

Investment Plan. The Investment Plan advances all five of the SFTP transportation goals. With a 30-year horizon, the Investment Plan primarily includes large categories of project types rather than individual projects. There are exceptions, such as major capital projects and projects with significant air quality impacts.

The funding needs for our transportation system always far exceed available revenues. Thus, we must always prioritize our available revenues and make tradeoffs when developing the Investment Plan. With anticipated revenues, the SFTP+ plan funds these categories:

- **Transit Operations** includes operations funding for Muni at 2025 service levels; San Francisco's share of BART and Caltrain operations; and continues Free Muni for Youth through 2050.
- **Paratransit** continues fully funding paratransit operations for seniors and persons with disabilities.

- **Transit Maintenance and Enhancements** maintains our transit infrastructure to prevent breakdowns and delays, and improve safety, reliability and accessibility. This category includes investments in vehicle and facility maintenance and rehabilitation for Muni, and San Francisco's share of BART and Caltrain; improvements to stations and bus stops like new elevators to improve accessibility; and a new Bayview Caltrain Station. This category also includes continued development of the next generation of transportation investments, such as the Geary/19th subway and the Central Subway Extension, such as project scope refinement and cost estimation. Prioritization of these projects will occur in the next update of SFTP.
- **Major Transit Projects** includes funding for the Caltrain Downtown Rail Extension project (aka The Portal) and the BART Core Capacity Program, as well as systemwide improvements to ease crowding, improve reliability, and increase rider capacity – such as train control systems and new vehicles – for Muni.
- **Street and Freeways** directs funding to maintain smooth streets - which benefit all motorists, transit passengers, cyclists, and pedestrians - through regular and timely maintenance, continuing to achieve a "Good" rating of 75 in the Pavement Condition Index. This category also includes funds for projects to improve street safety for all road users through new and upgraded traffic signals and signs; upgrades to the pedestrian and bicycle network; continued support for the Safe Routes to School Program; and improved safety at freeway ramp locations within San Francisco.
- **Transportation System Development and Management** includes programmatic Transportation Demand Management (TDM) categories, which help make the best use of limited roadway and transportation resources by employing strategies that may shift travel to less congested times of and/or to more sustainable travel modes. This includes funding for smaller TDM programs such as Guaranteed Ride Home and larger congestion management programs including the comprehensive Treasure Island mobility program. This category also includes planning and project development matching funds for the sales tax-funded Neighborhood Transportation Program and efforts that focus on equity planning and transportation-oriented development.

The Investment Plan addresses many of the highest priority needs, including gaps in access for equity priority communities, and advancing citywide transportation improvements; however, funding limitations mean there are still gaps and unmet needs. This underscores the need to continually seek to improve efficiency and cost effectiveness of project delivery to make the most of the available funding.

Vision Plan. The SFTP+ Vision Plan builds on the Investment Plan and imagines how to get closer to achieving our goals with significant new revenue sources. The Vision Plan includes major investments beyond what the fiscally constrained Investment Plan can support, such as expanding transit service to exceed pre-pandemic investment levels for Muni operations; reducing the capital maintenance backlog for transit operators to further improve transit reliability and safety; accelerating safety improvements; and delivering additional transformative transportation investments.

The Vision Plan assumes an additional $25 billion in potential new revenues on top of the Investment Plan, for a total of about $94 billion dollars. By illustrating the benefits of expanded investment, the Vision Plan provides a framework for future funding advocacy, policy development, and decision-making.

Policy Initiatives. Policy initiatives address transportation trends and larger needs that warrant further exploration and advancement to strengthen investment priorities and their impacts on transportation goals. SFTP 2050+ policy initiatives focus on advancing climate resilience, setting the stage for electrification, managing autonomous vehicle deployment, and identifying new revenues. Together, these initiatives complement the Investment Plan by addressing challenges that cannot be solved through capital investments alone and help position San Francisco to achieve its long-term transportation, climate, and equity goals.

Next Steps. This focused update reflects the current reality with a reduced revenue forecast, outlines priorities for available and new revenues, and prepares San Francisco for a healthy recovery. The passage of transit funding ballot measures in November 2026 significantly eased the critical, immediate need for an infusion of transit operating revenues to avoid service cuts which would have been devasting for transit riders, traffic congestion, equity, and San Francisco's economic recovery. However, more hard work remains to transition to a stable post-pandemic financial model for public transit funding. We must continue to find efficiencies and identify new approaches and new revenues to advance all our goals from safety to livability to economic vitality.

MTC has begun scoping its next regional update, PBA 2060, with a completion timeframe of 2030. We will work closely with MTC and our MTC Commissioners to provide coordinated San Francisco input into PBA 2060 and will begin planning for SFTP 2060 next year.

FINANCIAL IMPACT

The recommended action would not have an impact on the adopted Fiscal Year 2026/2027 budget.

CAC POSITION

The CAC will consider this item at its December 2, 2026 meeting.

SUPPLEMENTAL MATERIALS

- Attachment 1 – Draft SFTP 2050+ Report (without appendices)
- Enclosure – Draft SFTP 2050+ Appendices

San Francisco Transportation Plan 2050+

Final Report: December 2026



San Francisco County Transportation Authority

SFTP 2050+

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Acronyms and Abbreviations

AV: Autonomous Vehicle(s)

BART: Bay Area Rapid Transit

BRT: Bus Rapid Transit

CAC: Community Advisory Committee

CAP: Climate Action Plan

CARB: California Air Resources Board

CARE: Community Action Resource & Empowerment

CBO: Community-Based Organization

CMA: Congestion Management Agency

DAC: Disadvantaged Community

EPA: Environmental Protection Agency

EPC: Equity Priority Community

EV: Electric Vehicle

GHG: Greenhouse Gases

GPS: Global Positioning System

IP: Investment Plan

MTC: Metropolitan Transportation Commission

OBAG: One Bay Area Grant

ORCP: Office of Resilience and Capital Planning

PBA 2050/2050+: Plan Bay Area 2050/2050+

PCI: Pavement Condition Index

RTP: Regional Transportation Plan

RUC: Road User Charge

SCS: Sustainable Communities Strategy

SF-CHAMP: San Francisco Chained Activity Modeling Process

SFE: San Francisco Environment (Department)

SFMTA: San Francisco Municipal Transportation Agency

SFPUC: San Francisco Public Utilities Commission

SFTP: San Francisco Transportation Plan

SFTP+: San Francisco Transportation Plan 2050+

SOGR: State of Good Repair

TAC: Technical Advisory Committee

TDM: Transportation Demand Management

TFCA: Transportation Fund for Clean Air

TI Connects: Treasure Island Connects

TIMMA: Treasure Island Mobility Management Agency

TJPA: Transbay Joint Powers Authority

TNC: Transportation Network Company

VMT: Vehicle Miles Traveled

Executive Summary

The San Francisco Transportation Plan (SFTP) is the blueprint for San Francisco's transportation system development and investment over the next 30 years. As San Francisco's county Congestion Management Agency, the Transportation Authority prepares the SFTP covering all surface transportation modes, networks, and operators that serve the city and establishing long term strategies and investment priorities. SFTP 2050, developed in coordination with Plan Bay Area (PBA) 2050, the regional long-range plan, was adopted in 2022.

This report is a focused update of SFTP 2050 (SFTP 2050+), which responds to lower projected revenues from PBA 2050+ and post pandemic travel patterns. SFTP+ was prepared during a period of uncertainty, transition, and recovery following the COVID-19 pandemic, and with the transit fiscal cliff and opportunity to transform transit as major backdrops.

Compared to SFTP 2050, travel patterns changed significantly – the number of daily trips to, from, and within San Francisco dropped precipitously (−41%). While overall tripmaking remains lower than pre-pandemic levels, the share of those trips using automobiles rather than transit is increasing. Congestion on regional freeways and bridge approaches is on the rise and has returned to 2019 levels in San Francisco. These trends are concerning for the SFTP's shared goals of economic vitality, environmental sustainability, equity, safety, and livability.

Revenue projections are also affected by the pandemic and its associated economic changes. Local sources – fares, tax, and parking revenue – dropped significantly, reducing funds for transit operations, in particular, and maintenance as well as street infrastructure and major capital programs. Even with the passage of the two transit revenue measures in November 2026, there is an estimated 12% drop in overall transportation revenue (primarily local revenues) from the last SFTP update. This drop in expected revenues over 30 years required an adjustment to the SFTP Investment Plan.

San Franciscans weighed in with their priorities for a fiscally constrained Investment Plan via virtual town halls, in-person community meetings, and an online survey. The City's transportation needs are largely consistent with the last major update, but with greater urgency around stabilizing and improving transit service and improving safety on our streets.

Based on public feedback and technical analysis, and in light of reduced revenues, the Investment Plan was shaped to prioritize maintaining transit operations at 2025 levels. The plan also continues to include congestion management programs on Treasure Island and on San Francisco freeway corridors. Investment Plan limitations or tradeoffs

included removing major expansion projects (including Link 21, consistent with PBA 2050+), reducing investments in most state of good repair (SOGR) categories, and reducing smaller programmatic and planning categories, while maintaining funding for Safe Routes to School and pedestrian safety.

The SFTP+ Investment Plan is able to maintain funding levels for transit operations, paratransit (serving seniors and persons with disabilities), and Free Muni for Youth, among other priority investments. Analysis of the plan found it would result in modest progress toward SFTP 2050+ goals. There were improvements in transit mode share and ridership, and modest decreases in per-household vehicle miles traveled (VMT) overall (which affects air quality and livability). Improvements were also modest for equity populations specifically. However, funding limitations mean there are still gaps and unmet needs. There is more work to do in areas like street safety and SOGR and active management of our regional freeway network. Improved project delivery is all the more important to help ensure that the available funding is used as efficiently as possible.

The Vision Plan shows what more could be done toward achieving SFTP goals with new revenues. It includes major investments beyond what the fiscally constrained Investment Plan can support, such as expanding transit service to exceed pre-pandemic levels for Muni operations; reducing the capital maintenance backlogs for transit operators to improve transit reliability and safety; accelerating safety improvements; and delivering additional transformative transportation investments including next-generation transit expansion projects identified in SFTP 2050 and ConnectSF Transit Strategy. The Vision Plan serves as an aspirational roadmap that shows how additional transportation revenues could help San Francisco move beyond maintaining existing services and infrastructure toward achieving its broader safety, equity, economic vitality, and sustainability goals. As such, the Vision Plan provides a framework for future funding advocacy, policy development, and decision-making.

This focused update reflects the current reality with a reduced revenue forecast, outlines our priorities for available and new revenues, and prepares San Francisco for a healthy recovery. The passage of transit funding ballot measures in November 2026 significantly addressed one immediate challenge by averting what would have been devastating service cuts impacting transit riders, traffic, equity, and the San Francisco and regional economy. However, more hard work remains to transition to a stable post-pandemic financial model for public transit funding while continuing to make customer-facing improvements that attract new riders. New technology is making our streets safer and can be deployed across transportation systems for operational efficiency and safety, while managing risks. Finally, we must continue to explore innovations in project finance and program delivery, as well as identify new approaches to revenues to further advance all of the SFTP goals, and continue transforming San Francisco's long-range plans and aspirations into reality.

Introduction

WHAT IS THE SAN FRANCISCO TRANSPORTATION PLAN

The San Francisco Transportation Plan (SFTP) is the blueprint for San Francisco's transportation system development and investment over the next 30 years. The SFTP covers all transportation modes, networks, and operators that serve the city and establishes long term investment priorities. As the Congestion Management Agency (CMA) for San Francisco, the San Francisco County Transportation Authority (Transportation Authority) is responsible for developing the SFTP. The plan process combines a rigorous technical foundation, close coordination with partner agencies, and meaningful engagement with community stakeholders. The SFTP outlines a diverse investment strategy and supporting policy initiatives to advance goals of:

- **Equity**, improving access for equity priority communities.
- **Economic vitality**, supporting jobs and business growth.
- **Environmental sustainability**, reducing emissions and promoting active transport.
- **Safety and livability**, creating safer streets and better-maintained infrastructure.
- **Accountability and engagement**, implementing transparent processes with community input.

Figure 1. SFTP Goals



EQUITY
San Francisco is an inclusive, diverse, and equitable city that offers high-quality, affordable access to desired goods, services, activities, and destinations.



ECONOMIC VITALITY
To support a thriving economy, people and businesses easily access key destinations for jobs and commerce in established and growing neighborhoods both within San Francisco and the region.



ENVIRONMENTAL SUSTAINABILITY
The transportation and land use system support a healthy, resilient environment and sustainable choices for future generations.



SAFETY AND LIVABILITY
People have attractive and safe travel options that improve public health, support livable neighborhoods, and address the needs of all users.



ACCOUNTABILITY AND ENGAGEMENT
San Francisco agencies, the broader community, and elected officials work together to understand the City's transportation needs and deliver projects, programs, and services in a clear, concise, and timely fashion.

WHAT IS THE SFTP+

The SFTP+ is a focused update to the SFTP 2050, adopted in 2022, to reflect post-pandemic travel trends, revised revenue projections, and new land-use assumptions. This revised, recovery-oriented transportation plan includes a strong emphasis on transit, equity, and safety, while adjusting for:

- Post-pandemic travel data showing a 41% drop in total trips between 2019 and 2023, and a shift toward driving alone and ride-hail
- Lower projected transportation revenues
- Revised growth and land-use assumptions
- Alignment with Plan Bay Area (PBA) 2050+ (see text box below) and Transit 2050+, a parallel long-range effort to PBA 2050+ that re-envisions the future of the public transit effort in the nine-county Bay Area

The SFTP+ provides a progress report on projects, policies, and planning studies recommended in the 2022 plan and incorporates new topics that have emerged since the prior plan's adoption. The update also includes the latest data on existing and future conditions that impact San Francisco's transportation system, including growth projections showing a 50% increase in population and 30% increase in jobs by 2050 (additional detail in the Changes in Travel Behavior section below). The Transportation Authority gathered input from its board, partner agencies, and the public to confirm the priorities documented in this update. These efforts will guide advocacy for other near-term transportation funding and policy and project decisions. The SFTP+ is also coordinated with Plan Bay Area 2050+ (PBA 2050+), a limited and focused update to the original Plan Bay Area 2050 (PBA 2050), the region's 30-year long-range plan adopted in 2021.

WHY DOES THE SFTP MATTER?

Like many counties in California, San Francisco is a "self-help" county where local revenues make up the majority of transportation funding. Local matching funding is often necessary to access federal, state, and regional funds to deliver the projects and services that are essential to meeting the City's goals. The SFTP improves the City's ability to secure transportation funding by prioritizing projects for inclusion in an investment plan while also maintaining a broader vision for the future. Transportation projects seeking discretionary funding generally must be consistent with the SFTP and the region's long-range transportation plan, Plan Bay Area 2050+. The SFTP also ensures that San Francisco's transportation investments and advocacy are well coordinated and effective in achieving citywide goals.

Goals and Performance Framework

In the development of SFTP 2050, metrics were identified for each of the five goals to evaluate the performance of the investment plan scenarios against the baseline condition and against each other. Some metrics are possible to forecast with the travel demand model and others are quantifiable through other means. With this focused update, different metrics are introduced to better gauge progress on the shared goals.

Economic vitality of our transportation system can be measured using the number of jobs accessible to San Francisco residents within a certain time frame, and average commute times. Transit crowding and transportation affordability are also indicators.

Vehicle Miles Traveled (VMT) and mode share are measures of environmental sustainability – the fewer miles driven and the higher the non-auto mode share, the better it is for our environment. VMT also translates into greenhouse gases, which impacts the environment.

Safety and livability are evaluated in terms of crashes and crash outcomes, VMT, and roadway conditions. Crash trends help measure the safety of the city's streets. VMT accounts for overall exposure to traffic and associated safety and health risks. Roadway condition, or PCI, provides an additional measure of the quality and reliability of the transportation environment, recognizing that well-maintained streets support safe and comfortable travel for all roadway users.

Equity measures include VMT and mode share analyzed specifically for EPCs and for lower-income people in the city. Job access and commute times, exposure to traffic (proximity

RELATIONSHIP TO PLAN BAY AREA 2050

PBA 2050 is the Bay Area's Regional Transportation Plan (RTP) and Sustainable Communities Strategy (SCS) for the nine-county San Francisco Bay Area – the regional equivalent of the SFTP. PBA 2050 outlines transportation and land use recommendations, and a transportation investment strategy for a sustainable, equitable, and prosperous future. PBA 2050+ provides a focused update of PBA 2050, integrating regional changes since the adoption of PBA 2050, including changes in travel behavior, transit use, and economic conditions.

In the development of PBA 2050 and PBA 2050+, the Transportation Authority and our partners advocated for inclusion of critical regional and local priorities such as the Downtown Extension of Caltrain (or The Portal project), Caltrain Electrification, and Muni and BART core capacity projects.

The Transportation Authority works closely with the Metropolitan Transportation Commission (MTC), which leads the regional process, to ensure consistency between PBA and the SFTP. The SFTP+ will be part of San Francisco's input into the next major update of Plan Bay Area, PBA 2060.

of EPCs to high volumes of auto traffic), pavement quality, and affordability are all measures used to track performance on the equity goal.

Accountability and engagement is challenging to measure and even harder to predict. Roadway condition, as measured by the Pavement Condition Index (PCI), can be an indicator of accountability, in that a comparison of actual PCI performance with established targets can demonstrate progress and provide transparency about whether investments are delivering intended outcomes. Public opinion, as measured by support for funding initiatives such as transit, can also indicate levels of engagement. Tracking voter support or other measures of public sentiment over time can help assess whether transportation priorities align with community values.

Table 1 shows the key metrics used to measure performance toward our goals in this focused update.

Table 1. SFTP+ Goals and Metrics

GOALS	METRIC	DEFINITION / HOW MEASURED
Equity	Transportation Affordability	Evaluated qualitatively to identify and elevate efforts to lower the cost of transportation
	Traffic Exposure	VMT on links within 1/4 mile buffer of EPCs
	Job Access	Change in transit job access (45 min)
	Mode Share	Change in driving mode share
	Average Commute Times	Decrease in school and work commute time for EPCs, measured separately for transit and driving
	Injuries and Fatalities	Assessed qualitatively based on data trends
	Roadway Condition	PCI for EPCs
Economic Vitality	Job Access	Average of percent change in job access within 30-minutes driving and 45 minutes on transit
	Transit Crowding	Decrease in share of transit in-vehicle passenger miles in crowded conditions
	Average Commute Times	Decrease in school and work commute time, measured separately for transit and driving
	Transportation Affordability	Evaluated qualitatively to identify and elevate efforts to lower the cost of transportation
Environmental Sustainability	Mode Share	Sum of increase in transit mode share and decrease in driving mode share.
	VMT	Total miles on San Francisco streets and miles traveled per San Francisco household
	Greenhouse Gases (GHG)	Changes in GHG released by vehicles on San Francisco roads and GHG emissions per capita
Safety and Livability	Injuries and Fatalities	Assessed qualitatively based on data trends
	Roadway Condition	PCI
	VMT	Total miles on San Francisco streets and miles traveled per San Francisco household
Accountability and Engagement	Roadway Condition	PCI
	Support for Transit	Voter support for funding measures

PROGRESS ON OUR GOALS

Since SFTP 2050 was adopted in December 2022, San Francisco has made meaningful progress toward the city's shared goals. Highlights of that progress organized by goal area include:

Equity

Equity underlies all of the Transportation Authority's efforts and is a lens used to help prioritize the Authority's work. The Transportation Authority has also completed a number of planning and project development efforts and others are underway to improve access and mobility for San Francisco's EPC neighborhoods. The Bayview Caltrain Station location study was recently completed and a Bayview Truck Access study was initiated. In its role as the Treasure Island Mobility Management Agency (TIMMA), the Transportation Authority has launched bike share and is advancing other services toward implementation, helping to overcome the termination of the federal Environmental Protection Agency (EPA) grant for that program. Work began on the Western Addition – Geary Boulevard Community Study, which will address past harms and displacement resulting from the widening of Geary into an expressway, in collaboration with several Community Based Organizations (CBOs). San Francisco has maintained its commitment to keeping Muni fares affordable, extending Free Muni for Youth, seniors, and persons with disabilities in the budget process, (although recent changes to California Air Resources Board (CARB) regulations have reduced Cap and Invest funds available for this program).

Award and Termination of the Environmental Protection Agency Community Change Grant. Treasure Island Connects (TI Connects) was established to deliver the priority recommendations from the Treasure Island Supplemental Transportation Study and help shift the island's mode share to 50% walking, biking, and transit. The TI Connects program included a microtransit pilot, free on-island shuttle, enhanced Muni 25 Treasure Island service, zero-emission ferry infrastructure, bike share expansion, and a transportation resource center. TI Connects was initially funded by a $20 million EPA Community Change Grant that was later terminated by the EPA as the objectives of the project were deemed to be inconsistent with the new administration's priorities. TIMMA and the Transportation Authority have worked with funding partners to backfill some of the budget for bike share, shuttle, and ferry services, and capital improvements, and continue to evaluate options and seek alternative funding to fully close funding gaps.

Economic Vitality

Transit ridership is trending upward, supporting the increased economic activity as the city recovers from the pandemic. Weekday ridership on Muni is up to 81% of pre-pandemic levels and on weekends, ridership has surpassed pre-pandemic levels. Caltrain's new electrified service has improved service along the peninsula, providing

faster, quieter, more comfortable service to jobs in both San Francisco and Silicon Valley. Vehicular traffic on freeways and the Bay Bridge has returned, signaling greater economic activity and the need to manage congestion. Both Caltrain and Bay Ferry ridership have grown robustly, especially on weekends, and (San Francisco Bay Area Rapid Transit) BART ridership and customer satisfaction have risen with delivery of more Fleet of the Future rail cars and installation of new faregates systemwide. The Transportation Authority's Downtown Travel Study, completed in May 2025 and 2025 Congestion Management Program documented the return of traffic congestion on regional highways and bridge approaches, with vehicle volumes reaching pre-COVID levels on the SF-Oakland Bay Bridge and at the San Francisco/San Mateo county line. The San Francisco Freeway Network Management Study, initiated in 2024, will evaluate managed lane strategies on U.S. 101, I-280, I-80, and the Central Freeway.

Environmental Sustainability

San Francisco released its 2026 Climate Action Plan (CAP), building on the 2021 CAP and establishing new goals to reduce per-capita VMT by 30% and transitioning all cars and small trucks registered in the City to zero-emission by 2040. While mode share trends are showing elevated driving levels in the recent period, by supporting improved transit options, investing in street safety improvements, and advancing the city's Transportation Demand Management (TDM) market analysis and Strategic Plan, the Transportation Authority is working toward the goal of VMT reduction. The San Francisco Municipal Transportation Agency (SFMTA) and San Francisco Department of the Environment (SFE) have conducted Electric Vehicle (EV) charging pilots and launched a new curbside EV charger provision program, with Transportation Authority funding support. The Port of SF and partners (SFMTA, SF Public Works, others) are planning for adaptation strategies to stave off coastal flood risks and mitigate impacts to associated transportation network connections, and San Francisco Public Utilities Commission's (SF PUC's) Ocean Beach Climate Change Adaptation Project has made progress on west-side adaptation strategies.

Safety and Livability

The Transportation Authority Board and Mayor's office worked to improve safety and livability by adopting the Safe Streets Act in 2025 and issuing an Executive Order, which recommitted the City to ending severe and fatal crashes on the city's streets by advancing a set of strategies and specific actions. The City also implemented the first speed safety cameras at 33 locations, which have reduced speeding by over 80% at those locations. The Board of Supervisors recently supported a resolution to expand authority for this program, which is currently operating under a limited pilot authorized by the State legislature.

Accountability and Engagement

San Francisco has made quick-build delivery a standard approach, especially for certain transit priority and safety projects. The success of the Geary Rapid / Inner Geary transit lanes and corridor safety projects demonstrates that benefits can be delivered years earlier through phased implementation with fewer risks and lower costs. In July 2023, the Transportation Authority Board accepted the final report of the Transportation Capital Projects Delivery Study. The study identified a set of initial recommendations to improve capital project delivery in San Francisco over time, including development of more centralized project delivery expertise/capacity and strengthening of construction cost estimating, among others. The Transbay Joint Powers Authority (TJPA) is demonstrating an integrated team approach to delivery of The Portal and the Transportation Authority is successfully delivering major road and bridge projects on Yerba Buena Island using alternative delivery methods such as CM/GC as well as traditional methods. San Francisco's roadway condition, as measured by the PCI, has held steady at 74 (good).

San Francisco continues to approve funding in line with the SFTP's values and goals. The November 2022 passage of Prop L continued the existing half-cent transportation sales tax and approved a new 30-year expenditure plan, superseding the prior Prop K measure. Prop L estimated up to $2.6 billion (2020 dollars) in local sales which could leverage federal, state, regional, and other local revenues to fund a broad range of transportation projects and programs including safety and access investments, transit capital improvements, paratransit services, and neighborhood planning improvements, as well as major projects like Muni, BART, and Caltrain system modernization.

THE STREET SAFETY ACT

In September 2025, the Board of Supervisors unanimously adopted the San Francisco Street Safety Act (Resolution 437-25), authored by Transportation Authority Board Chair Myrna Melgar. This resolution recommits San Francisco to eliminating severe and fatal traffic crashes, strengthening interagency coordination, and scaling proven safety solutions. In December 2025, the City built upon the Street Safety Act, strengthening its commitment to pedestrian and bicycle safety through a new Street Safety Executive Directive from the Mayor to coordinate transportation-related agencies and improve safety for all road users, through actions such as expanded use of automated speed cameras.

Thirty-three automated speed enforcement cameras were installed in March 2025 and have proven to be an effective tool to address excessive speeding and reduce severe and fatal injury traffic collisions. According to SFMTA's report on the first 18 months of operation, excessive speeding has dropped by as much as 94% near senior centers and schools compared to pre-installation levels. In addition, approximately 63% of vehicle owners who receive a notice do not receive a second, and 80% of recipients receive two or fewer notices, suggesting that a single notice is sufficient to change behavior for most drivers. Similarly, red light cameras are a proven tool for reducing red light running, one of the leading causes of severe fatalities. SFMTA anticipates installing six additional red light cameras by year end.

San Francisco continues to recover from the pandemic with addressing transit agencies' operations shortfalls being a key priority. In November 2026, San Francisco and Bay Area voters approved two transit funding measures by wide margins, helping to stabilize transit operations for Muni, BART, Caltrain, and other regional systems for 14 years. While this averts the immediate fiscal crisis for many operators, SFMTA and BART still face funding gaps that need to be addressed through continued efficiency improvements as well as seeking additional funding. These ballot measures also provide modest amounts of funds for customer-facing transit improvements through the MTC and are essential to provide time for operators to pivot to new financial models that support long-term stability in this post-pandemic environment.

A FOCUS ON EQUITY

Equity is one of San Francisco's most important priorities for the transportation system and one of the five SFTP goals. Equity informs all of the Transportation Authority's work program.

"Equity" can be defined in many ways. The goal is to reduce disparities and ensure that disadvantaged populations are at least as well served by the transportation system as the general population, if not better. Performance can be analyzed specifically in EPCs, which are geographically defined areas meeting certain thresholds related to factors of disadvantage such as household income, race, English speaking proficiency, and car ownership levels. Seniors, youth, and those with disabilities are populations that are considered in EPC definitions. Equity can also be analyzed for disadvantaged populations in the SFTP, e.g. by comparing benefits and impacts to low income populations compared to the population as a whole.

SFTP 2050, adopted in 2022, summarized findings from the equity assessment conducted as part of the Prop L Expenditure Plan development, and included a neighborhood-by-neighborhood Equity Evaluation. That evaluation was not updated for this focused update, but the equity focus continued in the outreach approach, analysis, and plan development in the following ways:

- Disadvantaged communities were prioritized in SFTP+ outreach. The team met with community groups in the Bayview, the Richmond, the Mission, and Treasure Island EPCs, and presented to the Mayor's Disability Council and the Youth Commission. Discussion with the Disability Council members informed the update. Online surveys were also conducted in Chinese, Spanish, and Filipino, which generated feedback from Chinese speakers in particular.

- Post-pandemic travel behaviors were analyzed through an equity lens. The biggest changes in travel behavior were found among the lowest income San Franciscans, defined as people whose household income is $75,000 or less. Between 2019 and 2023, use of driving and ridehail services (like Uber/Lyft) grew among this group more than San Franciscans as a whole. They also walked less and took transit less. Census data indicates that people in lower income households are much less likely to work from home, and the cost of using ridehail or owning a car is higher than taking transit, so greater reliance on driving and ridehail is more burdensome for lower income people.
- The Transportation Authority is monitoring access to paratransit services (Essential Trip Card, Access for All wheelchair accessible ridehail services, and traditional shuttle and taxi-based paratransit services), as well as access to emerging mobility and transportation technology initiatives such as micromobility (bikeshare/scooter share), microtransit (Muni's Bayview Shuttle), ridehail services (including autonomous vehicle passenger services), and EV charging facilities.
- In a funding climate where lower revenue projections require reduced overall investment levels, projects that benefit equity populations were prioritized in the Investment Plan (IP). The top priority for investment was to maintain transit operations at current (2025) service levels. Funding was prioritized for paratransit operations, Free Muni for Youth, and the Bayview Caltrain Station. While the Investment Plan is financially constrained and reflects an estimate of revenues likely to be available for San Francisco during the 30-year plan period, the Vision Plan serves as an advocacy tool to show what additional progress could be made toward plan goals with more revenues. With respect to equity, the Vision Plan prioritizes funding for additional transit improvements to serve disadvantaged communities, such as new east-west and north-south routes connecting EPCs in the west and south parts of the city and improved Owl service.
- The team studied future conditions in 2050 with and without the IP projects and their impacts on disadvantaged communities compared to the population as a whole.

- In the 2050 Baseline, which includes growth in jobs and housing but maintains status quo transportation investments, projections of benefit to equity populations are mixed. Transit use increases and the use of auto modes decreases for people with lower incomes, which supports our goals; however transit crowding increases, which is a higher disbenefit to equity populations who are more likely to rely on transit and to use transit in general. Job access increases across income levels, due in part to the Family Zoning Plan's aim to expand housing throughout the City, especially along transit and commercial corridors. The increase in transit-accessible jobs is projected to be a bit higher for people with lower incomes than for the population in general.
- The 2050 IP modeling, which includes the new project investments, shows improvements in projected transit mode share and job access for EPCs. It also shows a modest increase in transit crowding over the 2050 Baseline, but the change is relatively small given the lower level of investments.

As the state and federal funding outlook fluctuates and economic conditions deteriorate for lower income people and other equity communities, it becomes even more important to focus on these populations. The Transportation Authority continuously strives to prioritize equity and is taking the following actions to advance equity:

- Based on the SFTP+ analysis and investment strategy, support efforts to sustain and enhance transit operations at current levels, especially those routes that serve EPCs. This includes continued progress with Muni Forward and implementation of initiatives identified in the Muni Service Equity Strategy
- Seek to protect, expand, and secure funding for transit state of good repair given its strong nexus to equity and other SFTP goals. This could include, for example, an effort to in coordination with SFMTA to work toward a citywide standard for transit stops, subject to funding and staffing resources.
- Prioritize investments on the High Injury Network which disproportionately affects EPCs.
- Prioritize projects and programs that help equity populations, such as funding affordability programs such as Free Muni for Youth; continuing to conduct community-based transportation plans in EPCs; and implementing recommendations from community-based neighborhood transportation plans in historically underserved areas such as the Mission, Chinatown, Treasure Island, Bayview-Hunters Point, Tenderloin, Visitacion Valley, Excelsior/Outer Mission, Oceanview/Ingleside and Western Addition.

- Continue to give priority to projects that benefit equity populations in the various grant and funding programs administered by the Transportation Authority – e.g. One Bay Area Grant (OBAG), Community Action Resource & Empowerment (CARE), Prop L, Prop D Transportation Network Company (TNC) Tax, Transportation Fund for Clean Air (TFCA).
- Monitor the PCI for EPC neighborhoods as compared to citywide average to ensure PCI disparities in those areas are addressed.
- Participate in MTC's upcoming update of its equity population assessment methodology to ensure disadvantaged San Franciscans are adequately represented, and advocate for changes in the California Environmental Protection Agency's CalEnviroScreen tool definition and its application to various state fund programs which currently limit San Francisco EPCs competitiveness in certain competitive grant programs.
- Apply lessons learned from SFTP+ outreach to improve engagement methodologies for equity populations, such as building stronger ongoing partnerships with community groups and promoting outreach efforts more effectively in language and non-digital formats.

Public Involvement

To inform the planning process, the Transportation Authority engaged with communities to gather input on their priorities for transportation investments. Community engagement occurred over two phases:

- Phase 1 Summer 2025
- Phase 2 Spring 2026

The team used a combination of outreach methods:

- Online, multilingual survey,
- Multilingual digital advertising,
- In-person and virtual community presentations,
- Public virtual town halls, and
- Round table discussions.

To promote participation in the planning process, the team contacted community groups across the city, including groups representing EPCs, partnered with CBOs to hold meetings and promote the survey, ran ads during the first round of outreach in in-language local media outlets (Chinese, Latino and Filipino media outlets), worked with the Community Advisory Committee (CAC) and Board to promote the survey, and highlighted the SFTP on the Transportation Authority website, in "The Messenger" e-newsletter, in emails to targeted project lists, and multiple social media platforms.

PHASE 1

During Phase 1 of outreach, the team collected 737 survey responses, gave presentations to 18 CBOs, and hosted two public town halls and two round table discussions with representatives of labor, advocacy, and business. Key findings that emerged from the outreach process include the following:

- **Maintaining Transit Operations and Improving Service.** The vast majority of outreach participants are supportive of maintaining transit operations in San Francisco as the "lifeblood" of our "transit first" city. A majority of survey respondents (436 respondents, or 63%) agree with the approach to prioritize funds first for transit operations at current service levels and for transit and roadway maintenance. Many participants called for capital improvements to build a "world class" transit system with expanded rail and rapid bus transit, but some advocated against spending on big projects like these while transit funding and ridership remain low.

- **Making Streets Safe for All.** Improving street safety was a high priority for many people who participated in the outreach process. Participants often drew a link between street safety and measures that incentivize walking, bicycling, and transit use while reducing the number of cars on the road. Survey respondents' top two priorities for preserving funding were for (1) making our streets safer for all (544 respondents, or 74%) and (2) incentivizing use of non-driving modes like transit, biking, and walking (443 respondents or 60%).
- **Funding Our Transit System.** Many people were concerned about the reduced revenues for transportation, particularly for transit operations precipitated by the pandemic and ensuing travel behavior and other changes, and especially concerned about the effects that this would have on transit (e.g., service reductions). Participants discussed a variety of methods to raise revenue for transportation investments, including boosting traffic enforcement, increasing the cost of parking, taxing rideshare and autonomous vehicle services, and implementing congestion pricing in the city.
- **Managing Congestion.** The projected increased congestion on San Francisco streets was concerning for many outreach participants, not just because of increased travel time but because of the negative implications of traffic on public health, street safety, environmental sustainability, and economic growth. People expressed different and sometimes diverging opinions about how to deal with congestion, with some calling for congestion pricing while others opposed this idea.
- **Mixed Opinions on Private Vehicle Travel.** Some survey respondents voiced views that prioritize driving for daily trips, and expressed opposition to changes in the transportation network that reduce road space for private vehicles or otherwise impede driving. A smaller number of respondents favored investments that prioritize alternatives to driving or even discouraging driving overall to improve congestion, street safety, and environmental sustainability.

PHASE 2

A second round of outreach was conducted in the Spring of 2026 to share findings from the previous round of outreach and the draft SFTP 2050+ Investment and Vision Plan. The team focused on the public's priorities for the Vision Plan and collected 227 survey responses, presented to 13 CBOs, hosted two virtual town halls, and participated in

two round table discussions with representatives of labor, advocacy, and business. Key findings taken from nearly 550 comments during outreach that included the following:

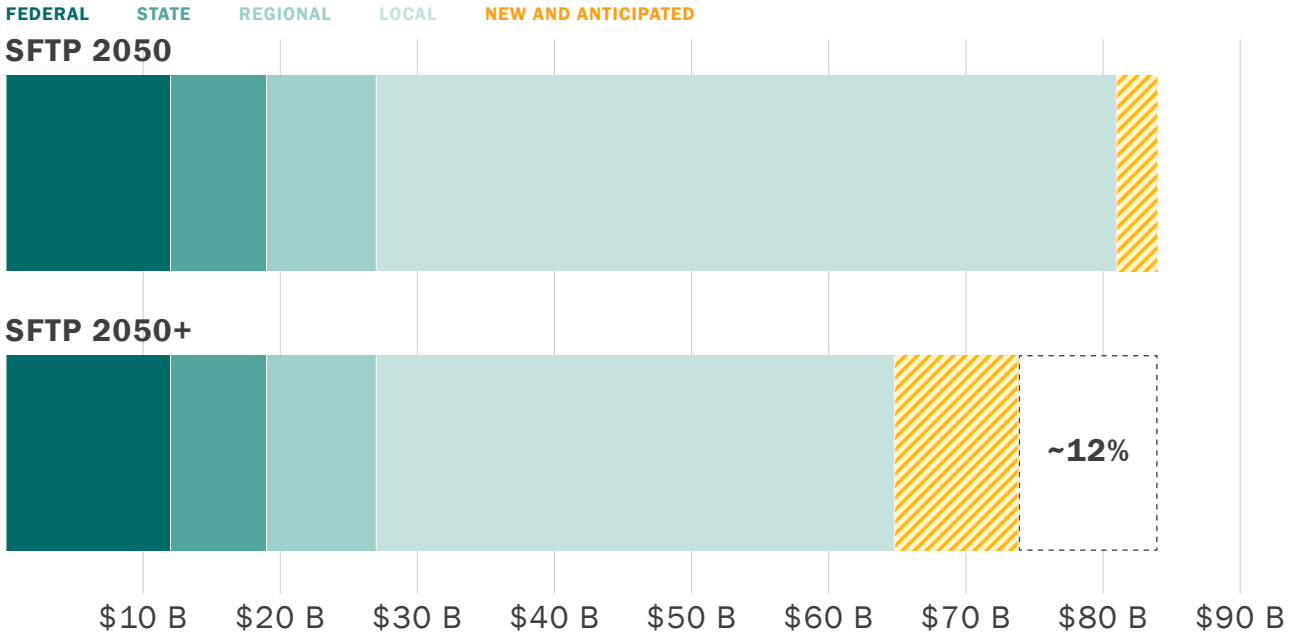
- **Improve Existing Transit Service.** The most frequently identified transportation priority was improving existing transit service, specifically transit reliability, frequency, and overall convenience. The community also called for improvements to other aspects of the transit system, such as improvements in the cleanliness, safety, and comfort of transit vehicles, stations, and stops. Many participants wanted more people to feel comfortable choosing transit as their preferred mode of transportation.
- **Expand Transit Service.** The next most frequently identified priority was expanding transit service, specifically calling for transit service to add new bus routes and express lines. Some community members called for expanding service based on where more demand exists, and others for more comprehensive expansion with increased service to EPCs and Owl service. Some community members also mentioned wanting new major transit projects, such as new subways and bus-only lanes.
- **Implement Traffic Calming and Multimodal Safety Projects.** Community members also called out the need for more traffic calming and safety projects, often citing safety concerns they had about travelling in the city on foot or by bike. Many comments reflected the desire to improve safety for all modes of travel, but a large subset of comments called for bicycle safety specifically. Community members often positioned improved bicycle infrastructure as a way to allow more people to choose bicycling as a safe, convenient, sustainable travel mode.
- **Convenience for Drivers.** Another theme identified in community outreach was whether or not convenience for drivers should be a priority for San Francisco transportation. As was the case in the first outreach round, some participants made comments arguing that convenience for drivers should be improved; others commented that transit, walking, carpooling and bicycling should be prioritized. For those that supported convenience for drivers, community members cited a desire to preserve or increase parking and/or opposition to shifting road space to travel by other modes. For those that prioritized transit-first modes, the main concerns were about safety, environmental sustainability, and the ability for the existing roadway network to accommodate increased private vehicle travel as the city grows in the future.

Changes Since SFTP 2050

LOWER TRANSPORTATION REVENUES

This focused update of the SFTP is coordinated with MTC's focused update of PBA 2050 and adjusts the investment plan to reflect lower revenue projections for the next 30 years in line with regional estimates. As shown in Figure 2, transportation revenue projections for the next 30 years are lower than estimated during the SFTP 2050 planning process. Specifically, San Francisco can expect to have approximately 12% less funding available to support the transportation system through 2050, or about $69 billion in total compared to SFTP 2050. Federal, state, and regional funding projections are about the same as the prior SFTP. However, significant reductions are expected in local sources, driven by changes in remote work and the economic downturn triggered by the pandemic – for example, lower transit fare and parking revenues and lower general fund and sales tax proceeds dedicated to transportation investments. Consistent with regional assumptions, SFTP+ revenue projections assume new funding would be secured to maintain transit service at current levels early in the plan period such as through passage of the November 2026 transit revenue measures and other sources. This is reflected in the assumed increased in new and anticipated revenue sources. Thus, the estimated 12% decrease in plan revenues remains despite the much-needed passage of the transit measures in November 2026 and the Investment Plan has been refined to adapt to this current reality of lower overall revenues.

Figure 2. Projected Transportation Revenues



2020 dollars
Download chart data (CSV)

HOW DOES THE TRANSIT FISCAL CLIFF IMPACT SFTP 2050+?

Assumptions made for SFTP 2050+ revenue projections included establishment of new funding sources dedicated to sustaining transit service. In November 2026, voters in San Francisco and the broader Bay Area approved two transit tax measures to address the region's impending transit fiscal cliff.

Beginning in 2027, the measures are expected to generate over $1.1 billion annually primarily for transit operations, as well as capital and customer experience investments across the region. Combined with $590 million in state loan funding authorized for Bay Area transit operators for fiscal year 2027, these resources will help transit operators avoid major service cuts.

Following the COVID-19 pandemic, Bay Area transit operators faced an ongoing budget deficit. This was caused by shifts in travel behaviors that resulted in significant losses of fare, tax, parking, and other kinds of revenues used to support transit operations.

Operators have taken significant steps to address their deficits since the onset of the pandemic, collectively achieving almost $1.1 billion in cost savings between July 2019 and June 2025 through strategies such as service adjustments, fare evasion initiatives, workforce reductions, and hiring freezes. Efficiency strategies undertaken by the SFMTA have resulted in approximately $300 million in savings.

However, the two ballot initiatives passed in November 2026 do not fully address BART and SFMTA's projected deficits which means that both agencies will need to continue pursuing efficiencies and cost reduction opportunities. BART, Caltrain and SFMTA will also need to work to develop sustainable post-pandemic financial models before Proposition RTM expires in 2041 and H in 2042, enabling them to not just survive but to thrive over the long term.

CHANGES IN TRAVEL BEHAVIOR

The SFTP 2050 was developed during unprecedented times when travel behaviors, San Francisco's transit network, and the transportation funding ecosystem all changed abruptly and significantly following the pandemic. Congestion dropped precipitously early in the pandemic but has gradually returned to 2019 levels on San Francisco freeways and bridge approaches. A primary theme of this long-range plan update is the change in travel patterns post-pandemic, and implications for travel projections for the future.

This section examines how travel behavior and population characteristics changed between 2019 and 2023, a period shaped by major social, economic, and public health disruptions. Using available regional and local data, it summarizes shifts in key demographic indicators such as employment, income, and age, as well as changes in trip purpose, mode choice, work from home rates, and deliveries. Together, these trends provide important context for understanding how travel demand has evolved after the COVID-19 pandemic, and help to frame current conditions relative to pre-pandemic baselines.

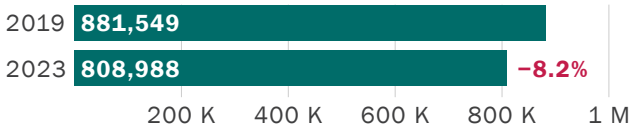
San Francisco's pre-COVID population peaked at 881,549 in 2019 and the city's population declined by 8.2% after 2019, falling to 808,988 in 2023. The number of jobs also decreased by 2.8%, from 765,099 in 2019 to 743,699 in 2023 while median household income rose slightly by 2.3% from $123,859 in 2019 to $126,730 in 2023. One notable change in this period is the share of older adults (65+) increased from 16% to 18.5%, a relatively rapid increase that informs the transportation needs of San Franciscans in the coming years. Figure 3 through Figure 6 illustrates these key demographic changes.

THE BAY AREA TRAVEL STUDY

The Bay Area Travel Study is a household travel survey dataset used by the Transportation Authority to understand how Bay Area residents travel in San Francisco and in the Bay Area.[1] Participants log every trip they make for a week to provide a record of actual travel behavior. They also provide information about in-home work activities ("telecommuting") and deliveries they may receive. The Transportation Authority uses this data in its travel analysis, modeling, and policy work. This section presents data from surveys completed in 2019 and 2023. See the Transportation Authority's Downtown Travel Study (May 2025) for a full discussion of survey findings and insights for San Francisco. The Bay Area Travel Study is led regionally by the Metropolitan Transportation Commission with the Transportation Authority as a key partner.

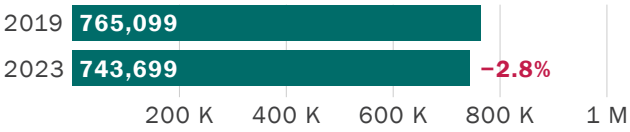
1 https://mtc.ca.gov/tools-resources/survey-program

Figure 3. San Francisco Population



Source: Census ACS and MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023
Download chart data (CSV)

Figure 4. San Francisco Jobs



Source: Census ACS and MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023
Download chart data (CSV)

Figure 5. Median Income (2023 dollars)



Source: Census ACS and MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023
Download chart data (CSV)

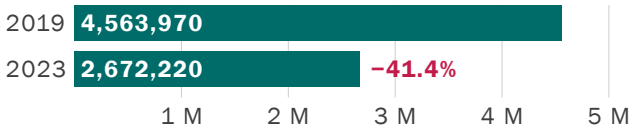
Figure 6. Older Adults (65+)



Source: Census ACS and MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023
Download chart data (CSV)

As shown in Figure 7, based on data from the Bay Area Travel Study, the overall number of weekday trips made by Bay Area residents to, from, and within San Francisco has decreased by 41% (1.9 million fewer trips) in 2023 compared to 2019. This is an enormous change in travel in San Francisco; however travel patterns will continue to change as the city and region recover from the pandemic and enter into a new cycle of economic growth. Figure 8 illustrates the reduction of regional transit trips by 7% (600,000 fewer transit trips on a typical weekday).

Figure 7. Weekday Trips to/from/within SF



Source: Census ACS and MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023
Download chart data (CSV)

Figure 8. SF Share of Regional Weekday Transit Trips



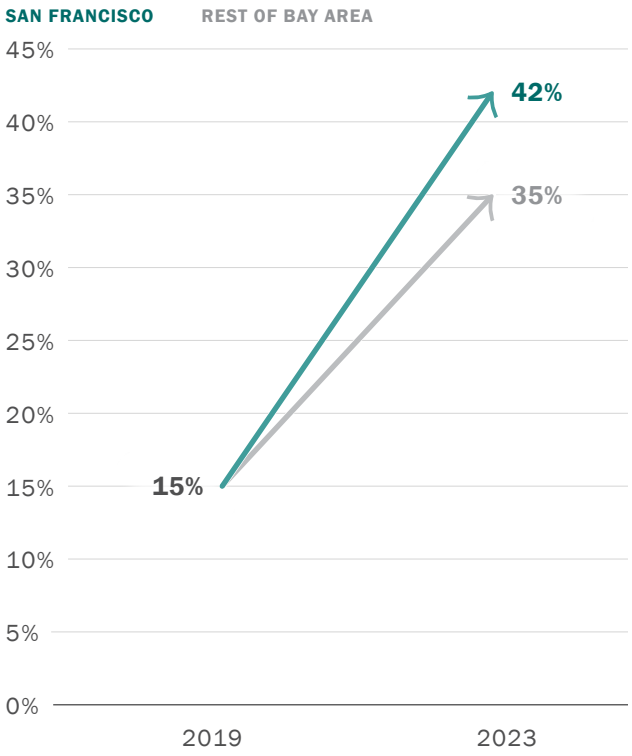
Source: Census ACS and MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023
Download chart data (CSV)

In 2025, the Transportation Authority published its Downtown Travel Study, which highlights the major travel trends and insights of the post-pandemic era using observed data to document changes in travel patterns and associated local demographic and economic conditions. The report focuses on a profile of the northeast sector in 2023 – 2024.

The report found that travel downtown dropped significantly in the post-pandemic era, characterized by lower regional trip-making and transit use, paired with an increased share of trips made by private vehicles and increases in remote work and e-commerce deliveries. At the same time, congestion had returned to pre-COVID levels in the p.m. peak on freeways in San Francisco even as weekday office attendance remained at less than 50% of pre-COVID levels by the end of 2024. The report also found transit ridership growing steadily since 2021, a trend that continues into 2026. Continued economic recovery will rely on stabilizing and growing local and regional transit funding and strategies to manage emerging freeway congestion as the economy improves.

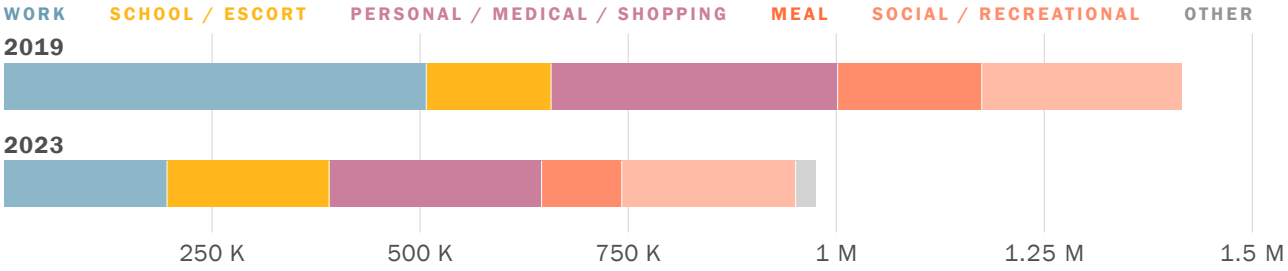
One of the most dramatic changes post-pandemic is where people work. As shown in Figure 9, 42% of employed residents of San Francisco worked from home on a typical weekday in 2023, compared to 13% in 2019. Twenty-four percent of employed SF residents work fully from home. This change is also reflected in Figure 10 which shows a significant reduction in the number and share of work trips and a relative increase in the share of trips for other purposes, including school, shopping, and recreation.

Figure 9. Typical Weekday Work From Home Rates



Source: MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023
Download chart data (CSV)

Figure 10. Trip Purposes, All San Francisco Journeys



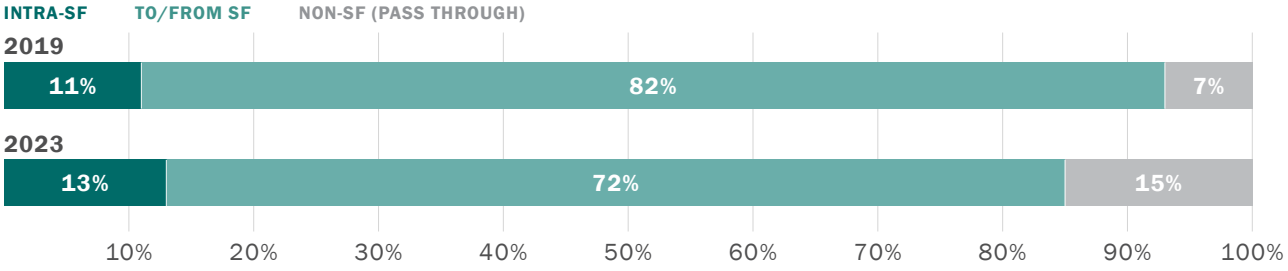
Source: MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023

Note: Average daily journeys to/from/within SF by Bay Area residents (excludes goods delivery, commercial, freight, visitor travel. Journeys start and end at home and include multiple stops

Download chart data (CSV)

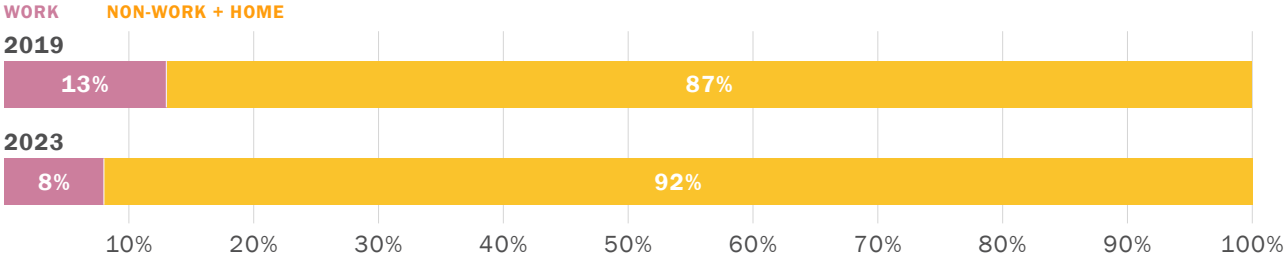
While there is a reduction in the travel overall, San Francisco's freeways continue to carry regional non-work trips. The share of trips on the I-80 freeway in Downtown with a work destination has declined, while non-work destinations (including discretionary trip purposes such as shopping, medical, and recreational) have increased. Figure 11 shows a reduction in the share of work trips on I-80 (west access to SF-Oakland Bay Bridge) from 13% in 2019 to 8% in 2023, while Figure 12 shows that there is an increase in the share of trips passing through San Francisco, from 7% in 2019 to 15% in 2023.

Figure 11. Typical Weekday Auto Trip Origins and Destinations on I-80 (between U.S. 101 and Bay Bridge)



Source: travel diary survey
Download chart data (CSV)

Figure 12. Typical Weekday Auto Trip Purpose on I-80 (between U.S. 101 and Bay Bridge)

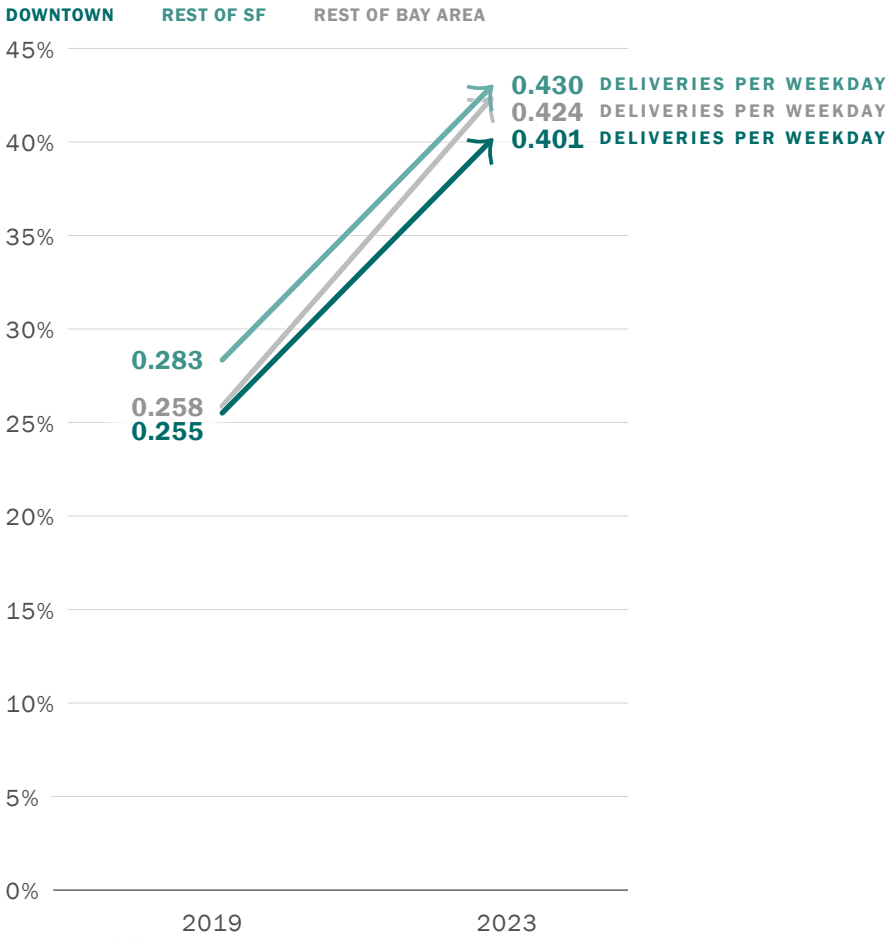


Source: travel diary survey
Download chart data (CSV)

As of 2023, average congestion on freeways in San Francisco was at pre-pandemic levels in the PM peak, despite office attendance at 40% to 45% of pre-pandemic levels. Traffic volume at the San Francisco/San Mateo county line had also returned to 2019 levels. While overall tripmaking remains lower than pre-pandemic levels, the share of those trips using automobiles rather than transit is increasing, with congestion on regional freeways on the rise.

Another dramatic post-pandemic change has been the volume of deliveries people receive on a typical weekday. As shown in Figure 13, the Downtown Travel Study found that the share of Downtown residents receiving a package or food delivery on a typical weekday increased from 26% in 2019 to 40% in 2023. Citywide, there was a similar increase, with 28% receiving deliveries in 2019 and 42% receiving deliveries in 2023.

Figure 13. Deliveries by Home Geography (Downtown)



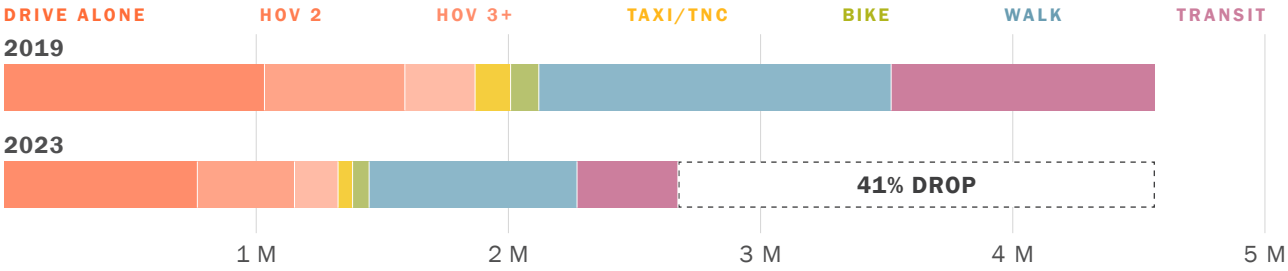
Source: travel diary survey

Note: For example, adults living in Downtown received at least 0.255 deliveries per typical weekday in 2019. Alternatively, this metric can be interpreted as at least 25.5% of adults living in Downtown received deliveries per typical weekday in 2019.

Download chart data (CSV)

While fewer people are traveling, when they do move around, people are more likely to drive. Figure 14 shows the dramatic changes in San Francisco residential trip-making levels and the proportion of trips made by multiple travel modes in 2019 and 2023. It shows that driving (solo driving, ride hail, two-person carpool) increased from 38% in 2019 to 45% in 2023. Transit mode share decreased from 23% to 15%. Taken together, the percentage of trips made by sustainable modes (transit, biking, walking, 3+ carpool) decreased from 62% to 55%. This shift to a higher driving mode share is likely due to reduced transit levels, rider concerns about social distancing and hybrid work patterns. The resulting increase in driving portends the risk that San Francisco experienced with the prior economic cycle that resulted in hyper-congestion in the city's northeast sector in the late 2010's. Transit improvements and travel demand management are needed to ensure a healthy recovery as San Francisco grows in population and jobs.

Figure 14. Annual Person Trips by Mode



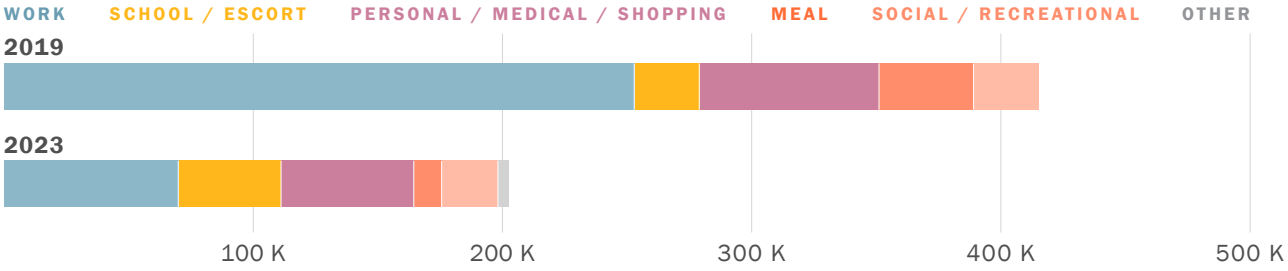
Source: MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023

Note: Average daily trips to/from/ within SF by Bay Area residents (excludes goods delivery, commercial, freight, visitor travel)

Download chart data (CSV)

Figure 15 shows the purpose of trips taken on transit. While in 2019 work was the dominant reason for people to take transit and accounted for approximately 250,000 trips (61%) on a typical weekday, in 2023 the number of trips was about one-third (35%), with almost half of transit journeys taken for discretionary reasons (medical, shopping, meals, social, recreational).

Figure 15. Journeys by Transit



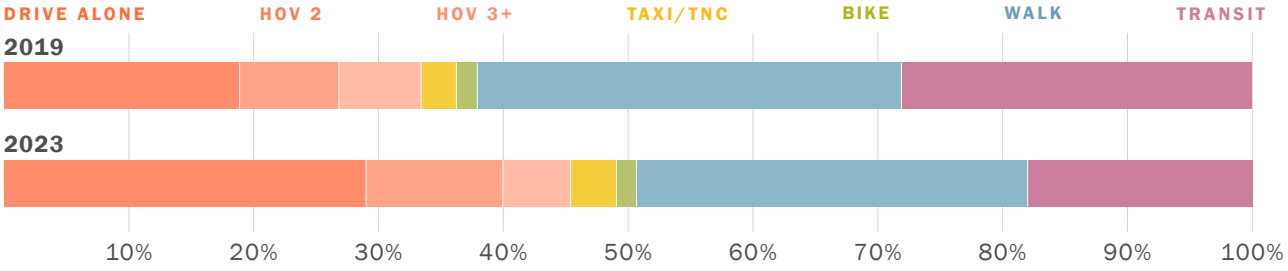
Source: MTC / SFCTA / SCVTA Travel Survey, 2019 and 2023

Note: Average daily journeys to/from/within SF by Bay Area residents (excludes goods delivery, commercial, freight, visitor travel. Journeys start and end at home and include multiple stops

Download chart data (CSV)

In the effort to ensure that planning work addresses equity populations and advances equity goals, the Transportation Authority studied how travel patterns changed for lower income populations. A significant finding is shown in Figure 16. The increase in the share of drive alone, ride hail, and carpool trips for people in households earning less than $75,000 is notably greater than for San Franciscans as a whole. People within this lower income range had the largest drop in transit usage and the most significant increase in drive alone and ride hail services of all income groups. Auto ownership and ride hail services are generally more costly than transit, so a better understanding of this mode shift trend is needed in order to better understand the affordability impacts of transit service reductions and the rise of driving.

Figure 16. Mode Share for Households Earning Less than $75,000

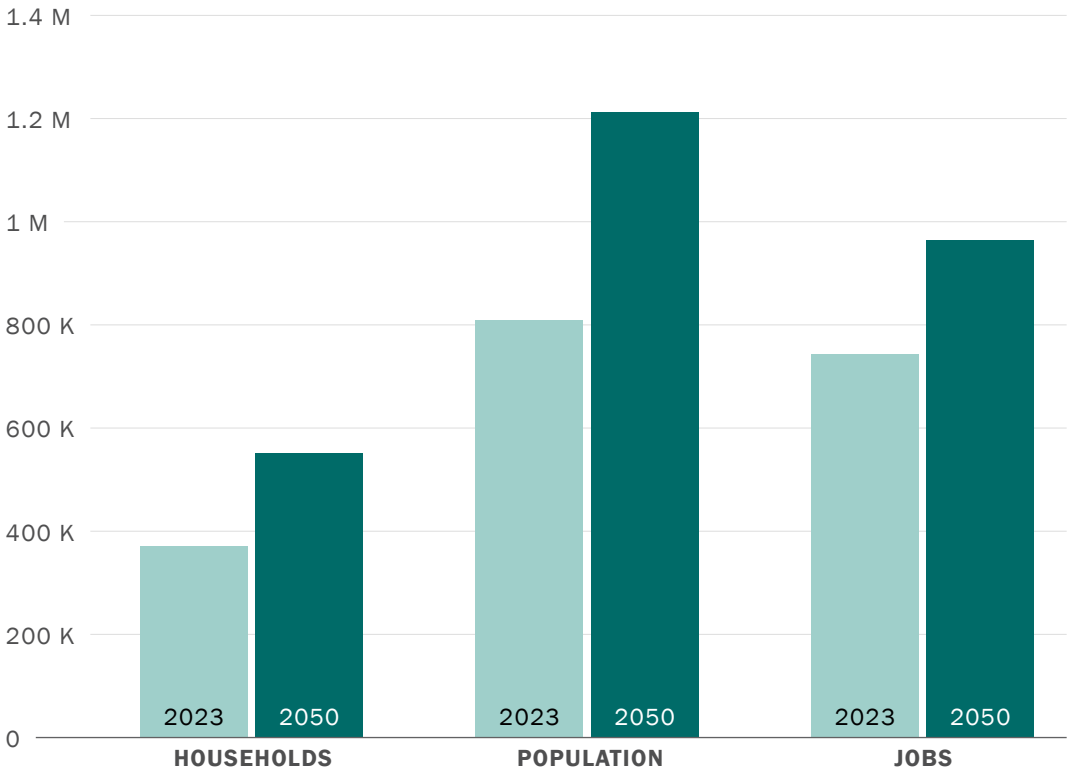


Download chart data (CSV)

UPDATED LAND USE PROJECTIONS

This section describes the future conditions in San Francisco related to its transportation network. As shown in Figure 17, following the loss of population and jobs post-COVID, San Francisco is expected to grow, with 29% more jobs and 50% more residents by 2050. These projections are based on regional projections for the nine-county Bay Area. Within San Francisco, the distribution of jobs and housing growth was determined based on analysis from the Planning Department, factoring in local zoning policies. See Figure 18 and Figure 19 comparing changes in population in San Francisco between 2023 and 2050, and Figure 20 and Figure 21 comparing changes in jobs.

Figure 17. San Francisco Jobs and Population



Download chart data (CSV)

Figure 18. San Francisco Population Density, 2023

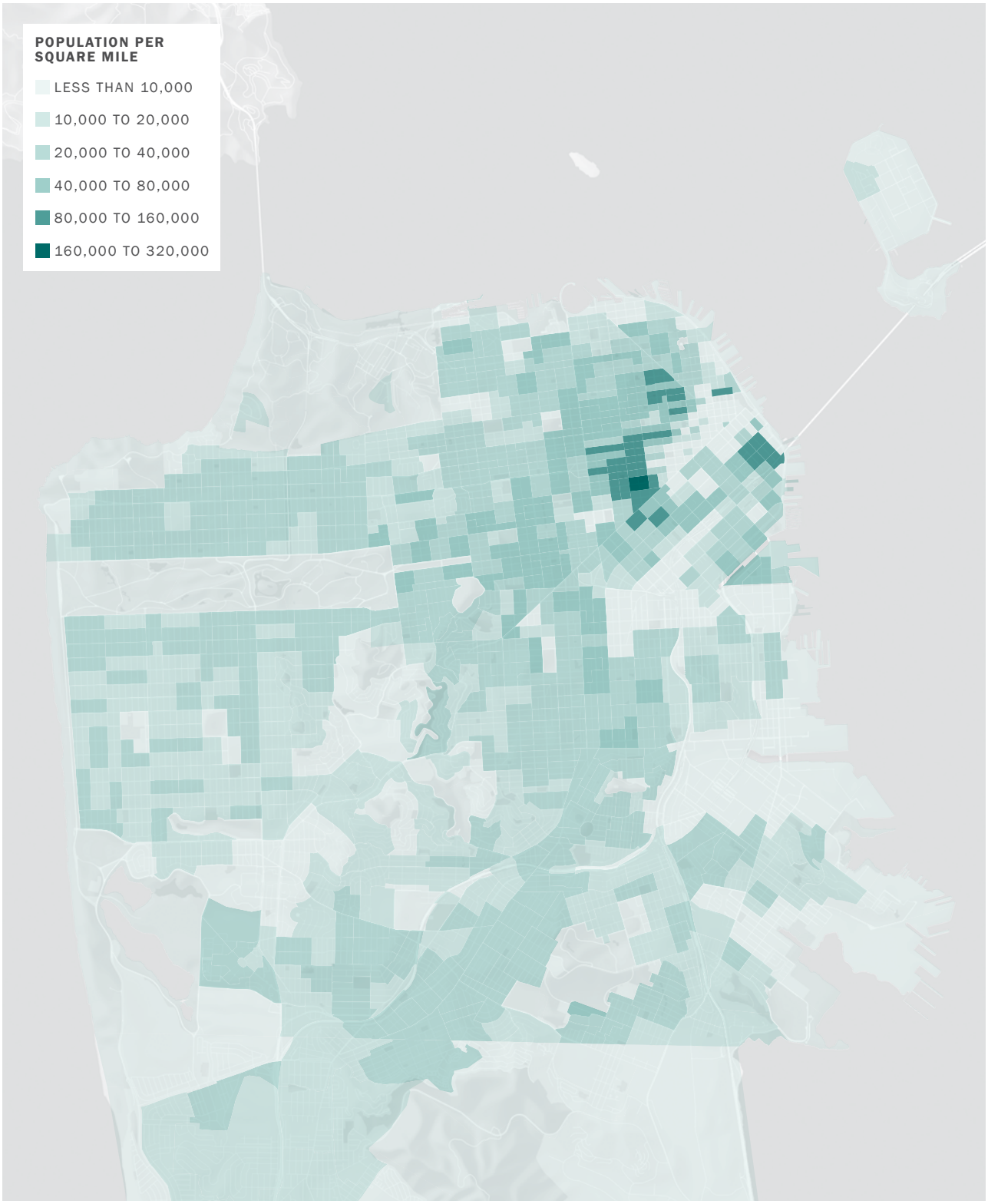


Figure 19. San Francisco Population Density, 2050

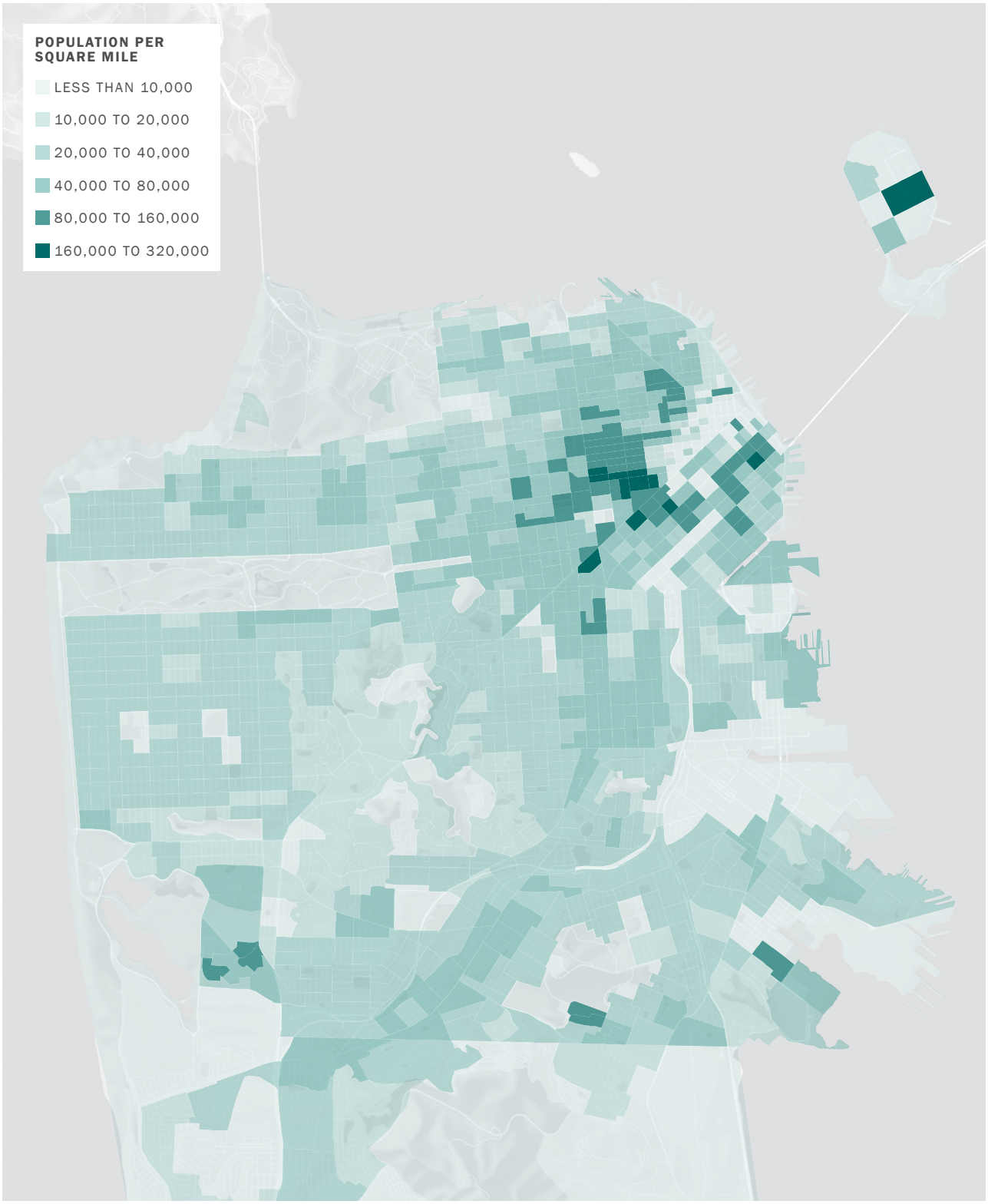


Figure 20. San Francisco Job Density, 2023

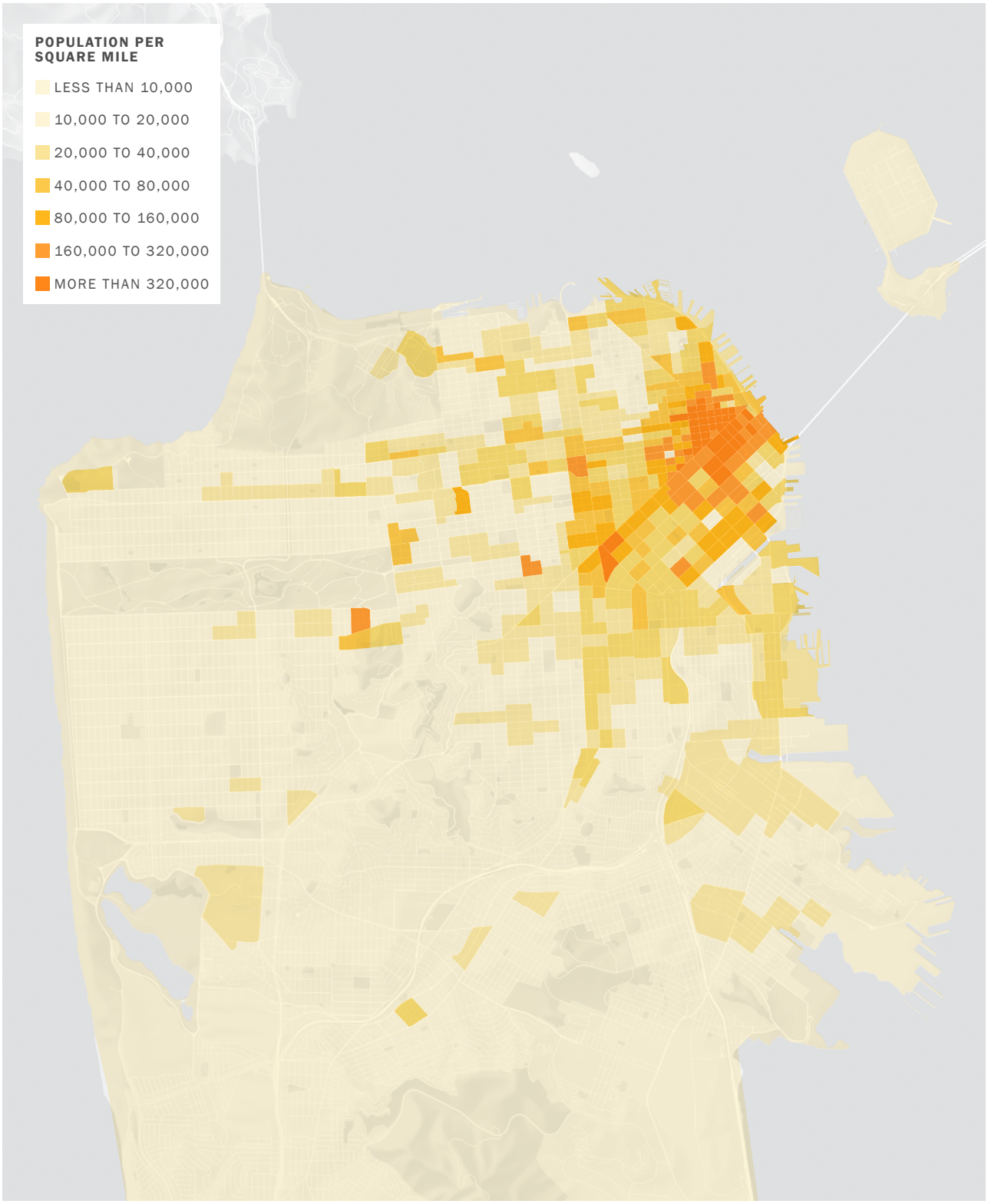
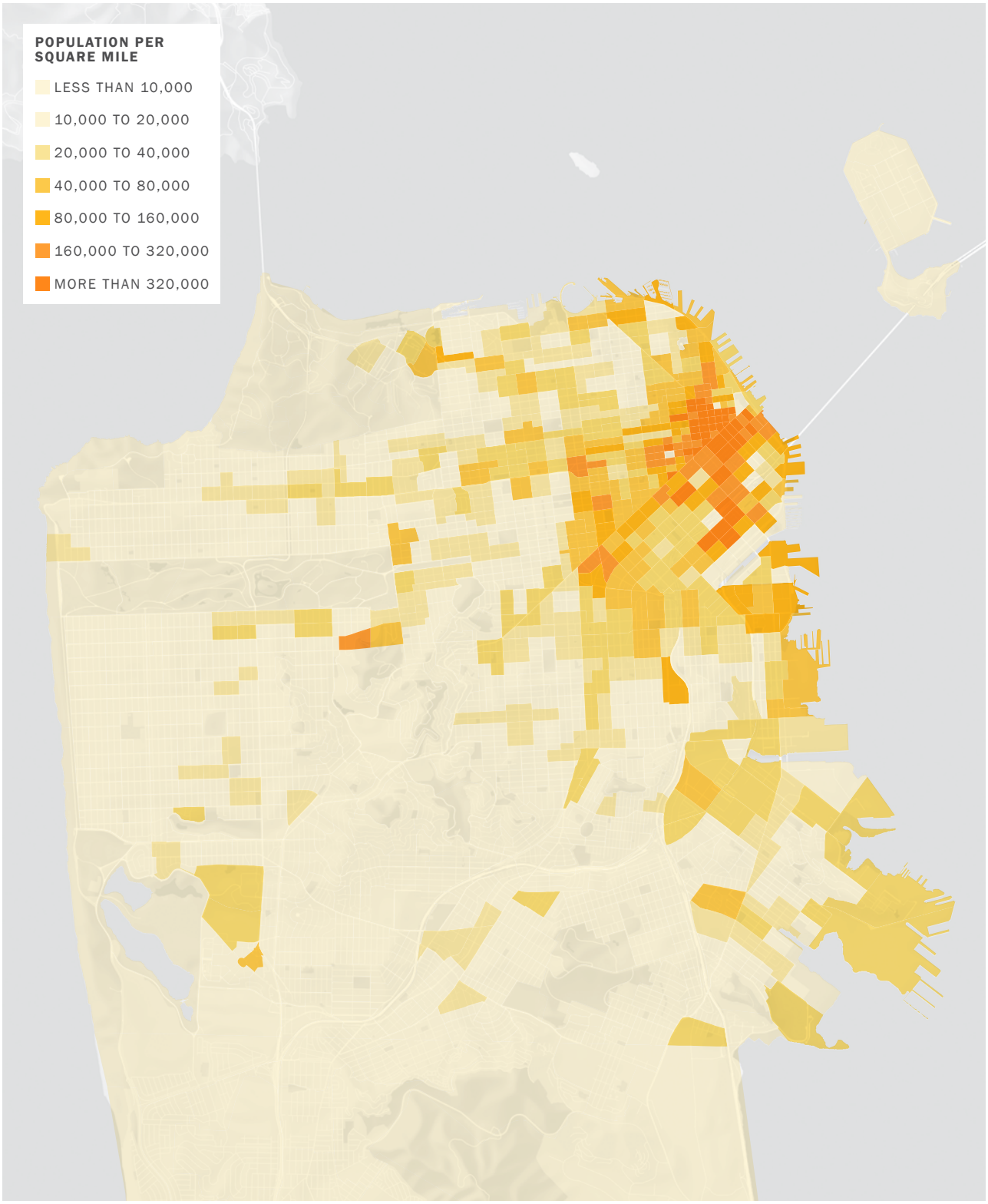


Figure 21. San Francisco Job Density, 2050



In addition to the underlying growth, it is assumed that transportation projects currently underway or fully funded will be in operation in 2050. These projects include Geary Bus Rapid Transit (BRT) Phase 2 and various Muni Forward projects, for example.

2050 BASELINE PERFORMANCE

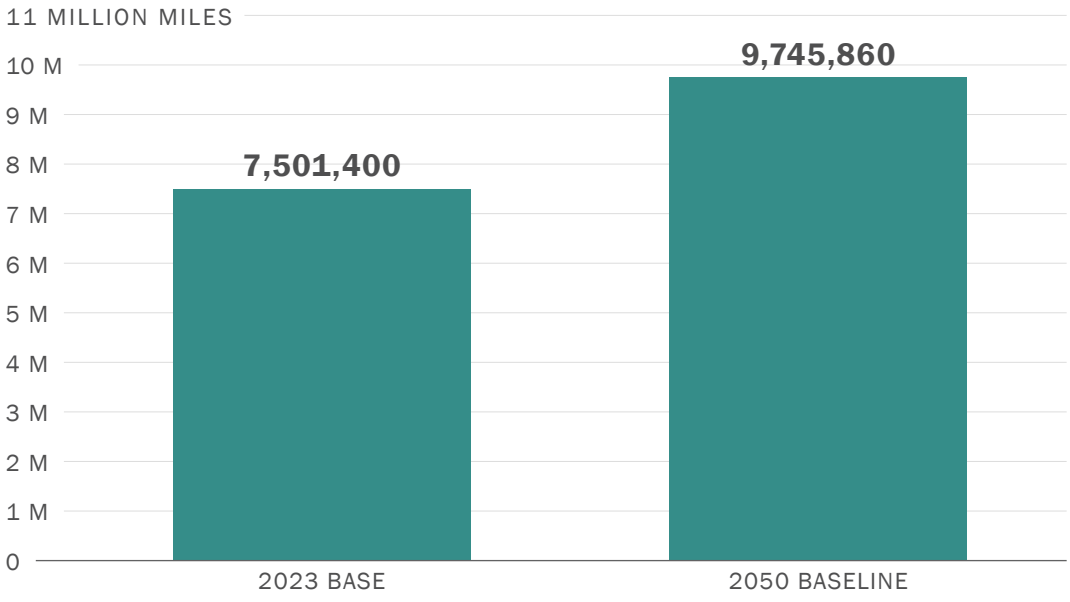
Using the San Francisco Chained Activity Modeling Process (SF-CHAMP or CHAMP) model, 2023 base conditions were compared to future conditions in 2050. The 2023 "Base" scenario reflects conditions as of 2023, the base year for the SFTP+ analysis, including post-pandemic travel patterns described above. The Base year is updated from the Base used in SFTP 2050, which was 2019.

The 2050 "Baseline" scenario reflects anticipated changes in population, employment, land use, travel behavior, and transportation investments, and is intended to illustrate relative trends and spatial patterns. The 2050 Baseline scenario assumes the projected growth in jobs and housing, 2025 transit service levels and post-pandemic travel behaviors, and completion of funded infrastructure projects. See Appendix E for description of the CHAMP modeling methodology.

This section presents projected changes in key metrics from the 2023 Base through 2050 Baseline, providing a forward-looking assessment of how travel demand is expected to interact with the city's multimodal network over time.

With the increase in jobs and population, San Francisco would see an almost 30% increase in VMT, as shown in Figure 22, Figure 23, and Figure 24.

Figure 22. Daily VMT on SF Streets 2023 Base and 2050 Baseline (millions)



Download chart data (CSV)

Figure 23. VMT per Household, 2023 Base

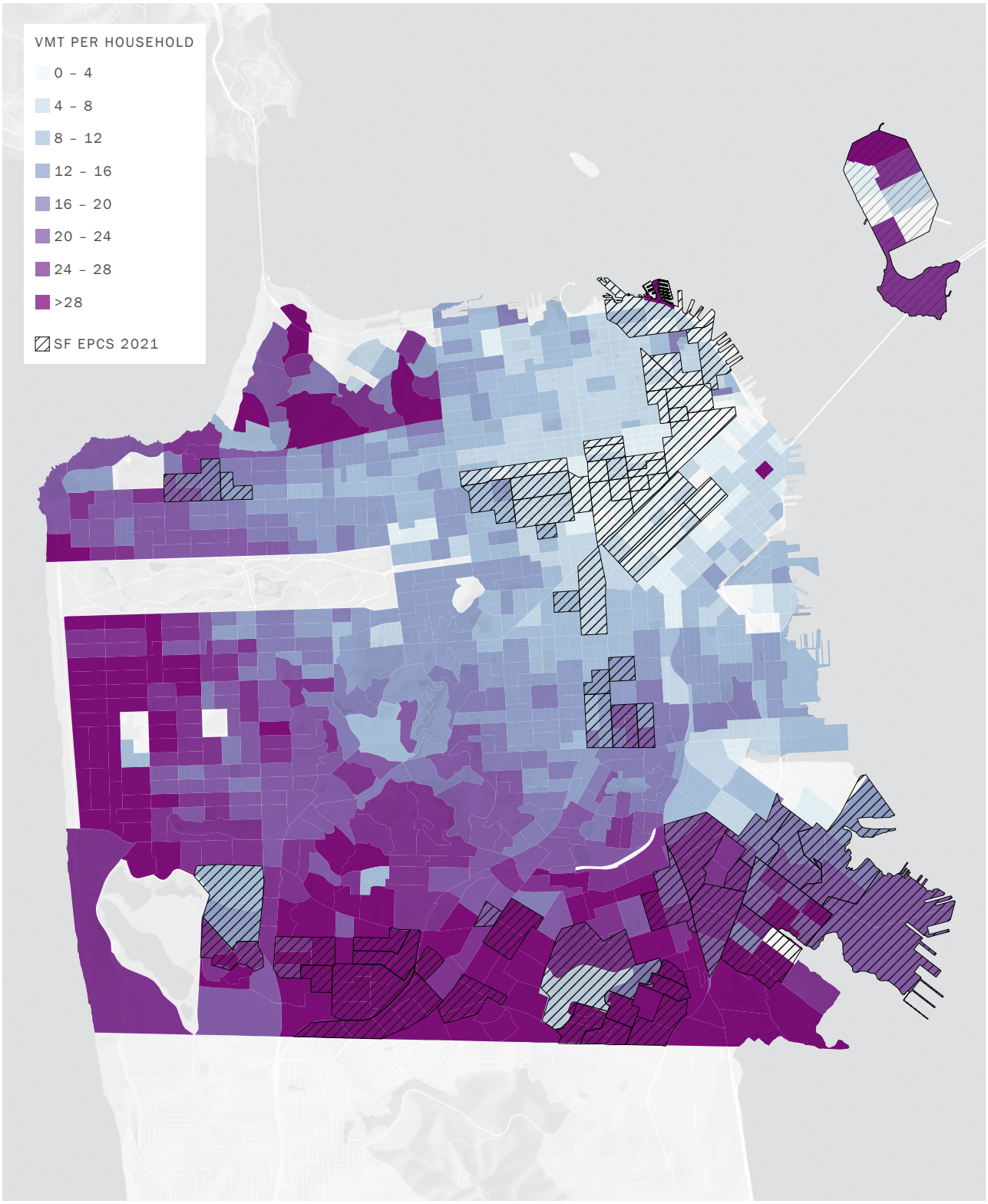
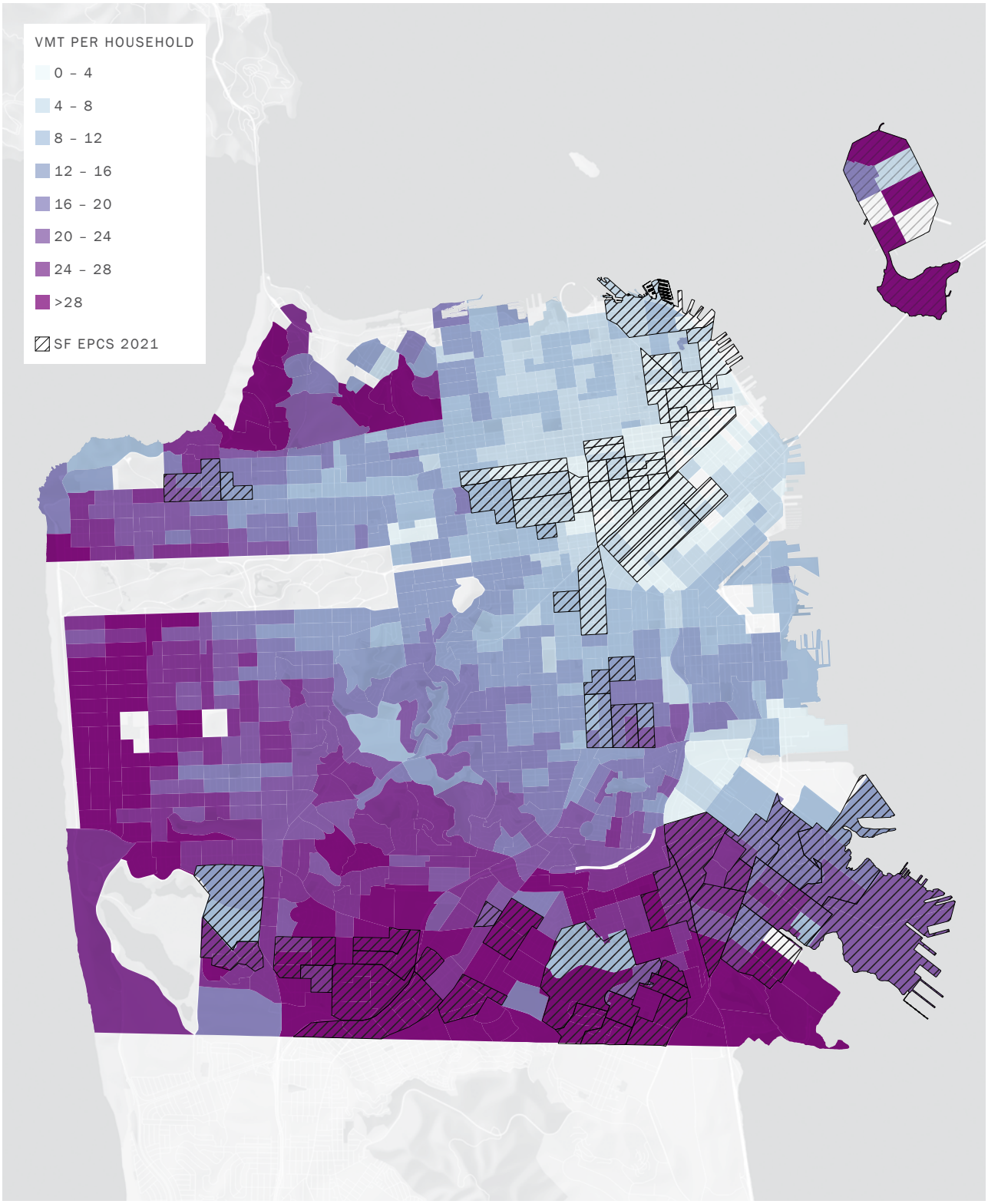


Figure 24. VMT per Household, 2050 Baseline



Roadway volume-to-capacity metrics (Figure 25 and Figure 26) are used to identify corridors where vehicular demand is expected to approach or exceed available capacity, indicating potential congestion, delay, and reliability challenges, comparing 2023 to 2050. A volume-to-capacity ratio of 0 indicates no vehicles on a road and a volume-to-capacity ratio of 1.0 indicates that a road is serving the maximum number of vehicles it can handle. Higher numbers indicate more congestion and a value approaching or exceeding 1.0 indicates congestion. In this comparison, the volume-to-capacity ratio, which reflects congestion, worsens on the bridges and freeways, and along 19th Avenue and other north-south arteries on the west side. Congestion also increases on surface streets in downtown and some arterials on the west side of the city.

Figure 25. Morning Peak Hour Volume-to-Capacity, 2023

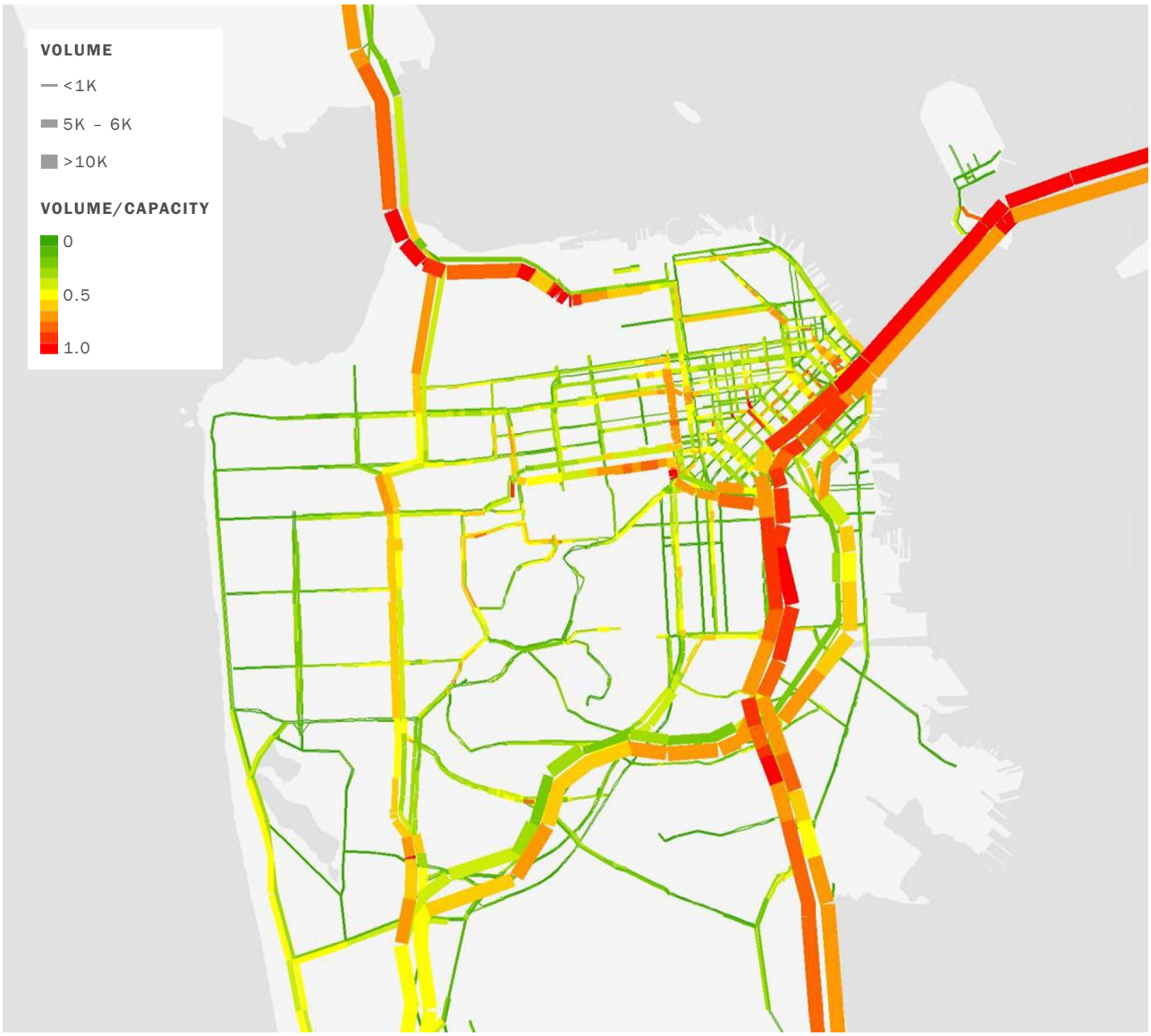
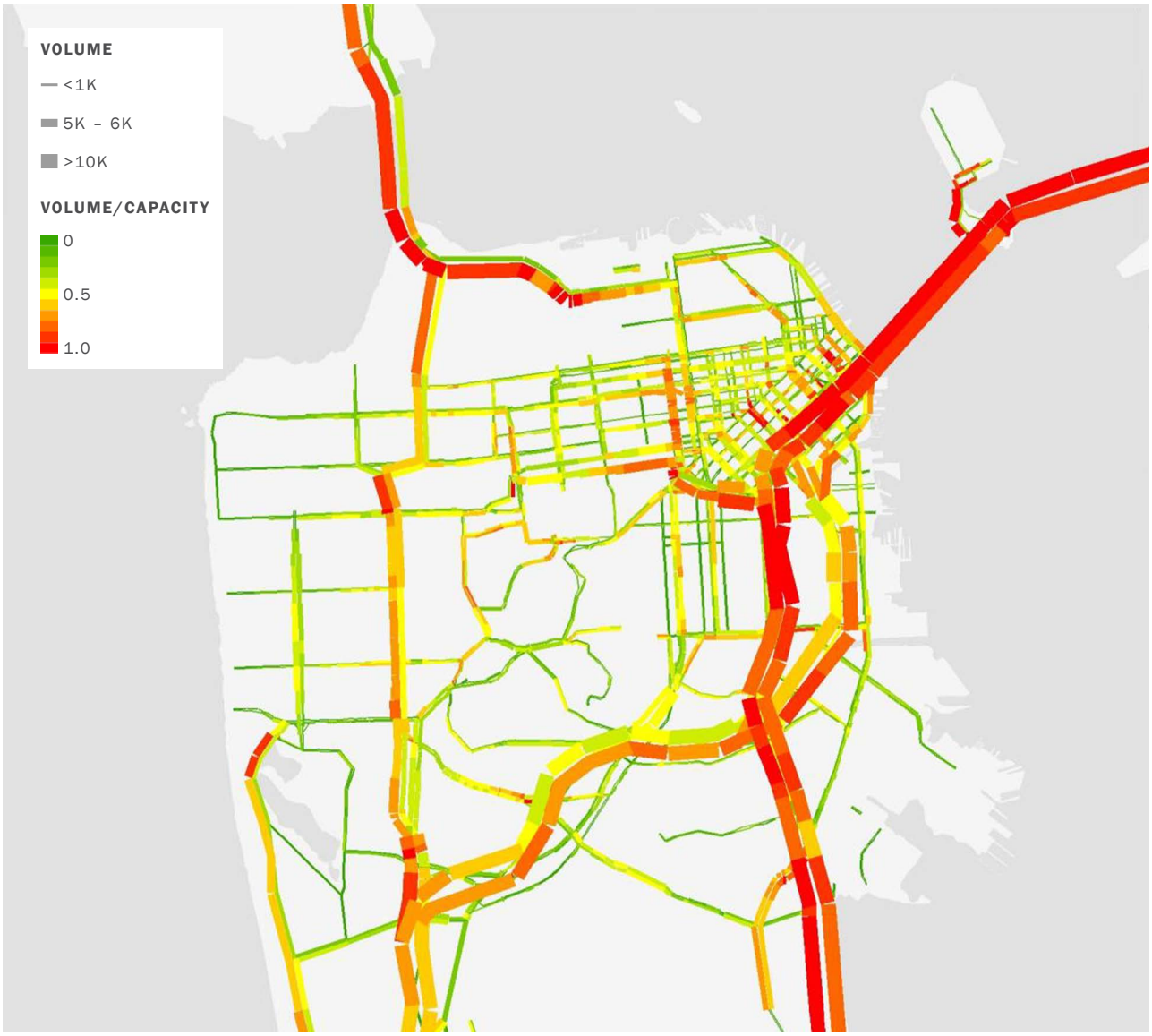


Figure 26. Morning Peak Hour Volume-to-Capacity, 2050 Baseline



Transit crowding projections (Figure 27 and Figure 28) similarly evaluate future ridership relative to vehicle or line capacity, highlighting locations, routes, and time periods where demand may exceed current or planned service levels. Transit crowding is expected to increase by 2050, primarily on key corridors as they approach the downtown core. It is important to note that while this map suggests transit crowding is focused in the northeast quadrant of the city, every rider experiences crowding, even if they boarded in the outer areas of the city.

Figure 27. Morning Peak Hour Transit Crowding, 2023

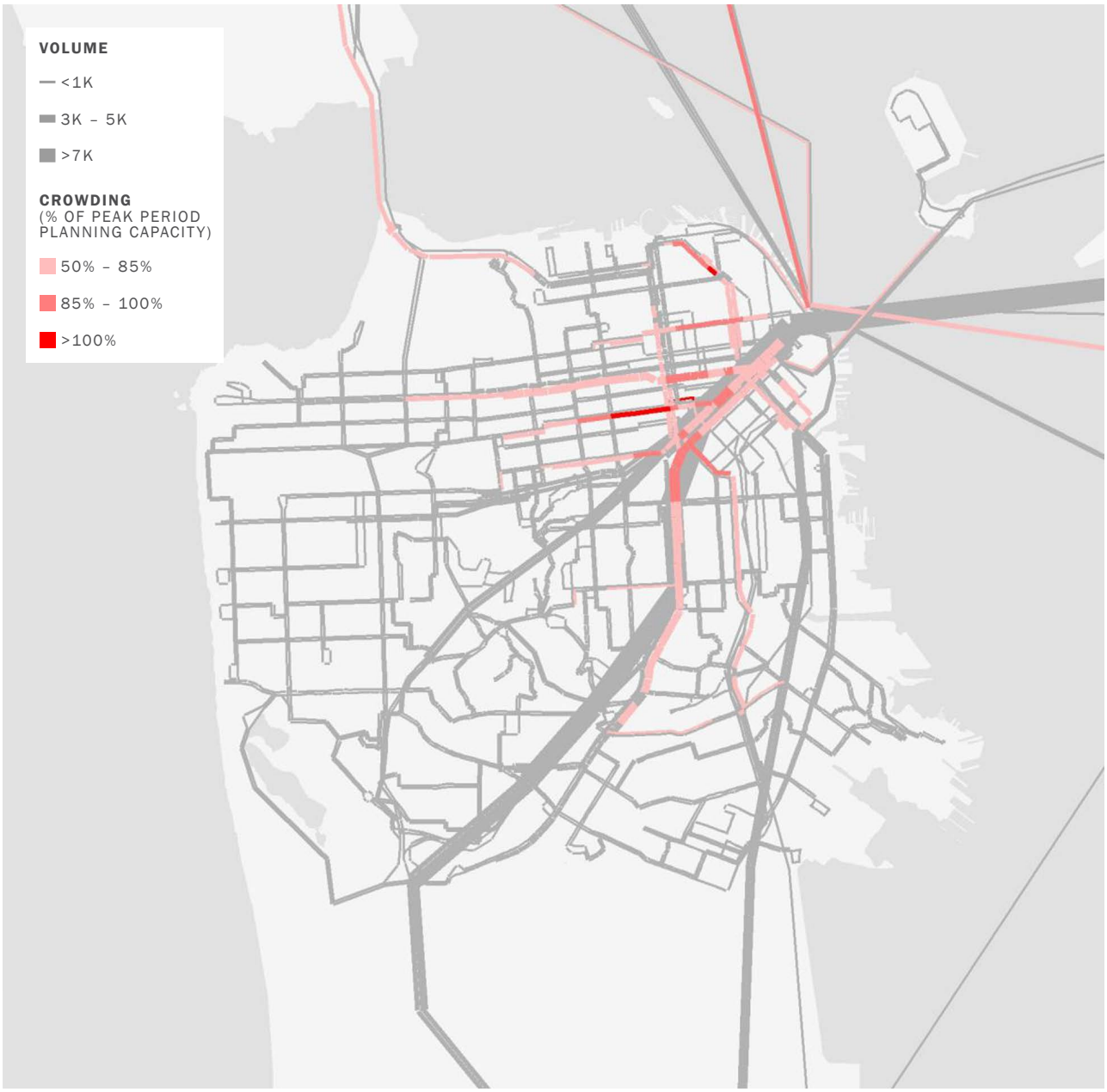
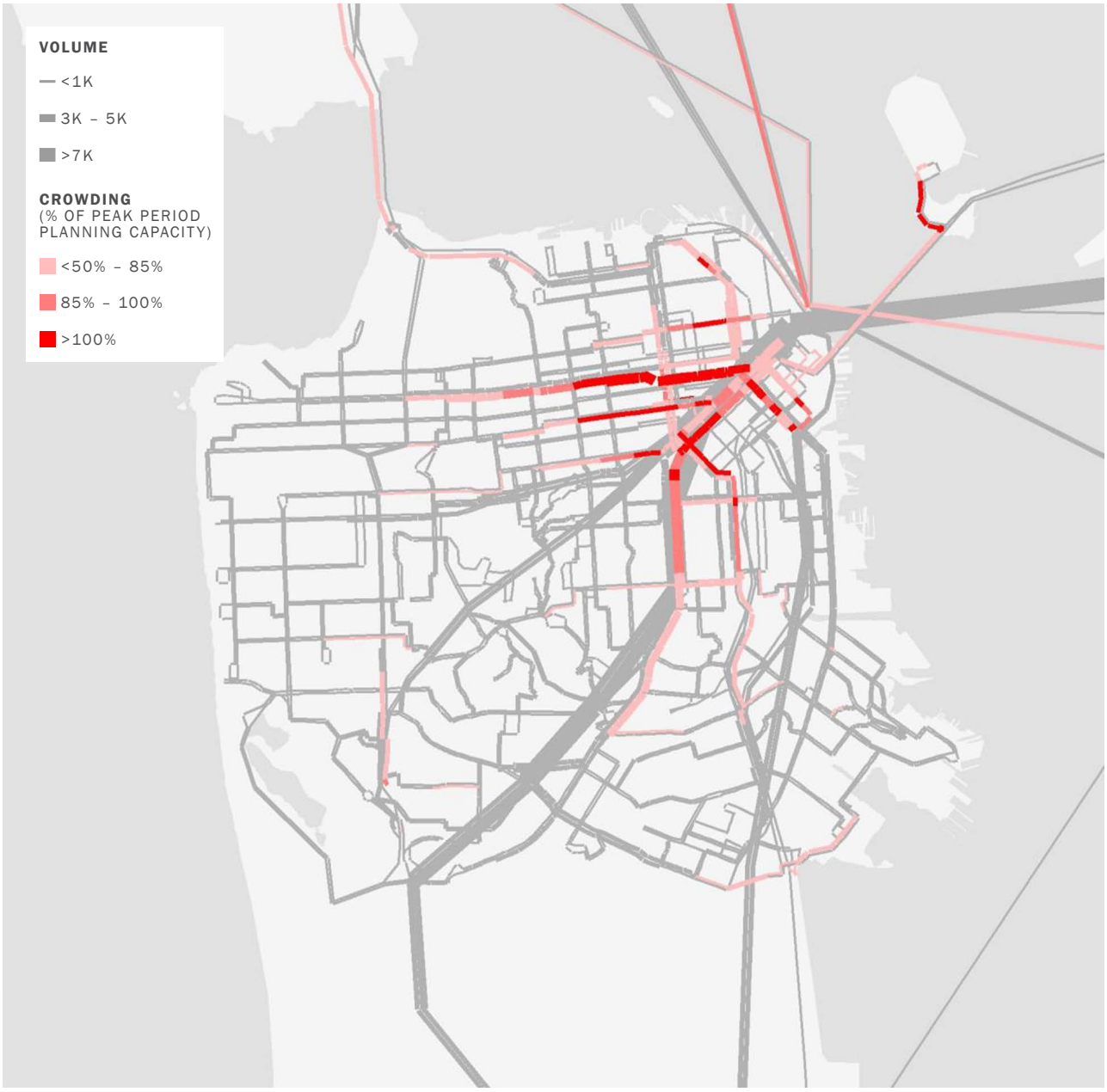
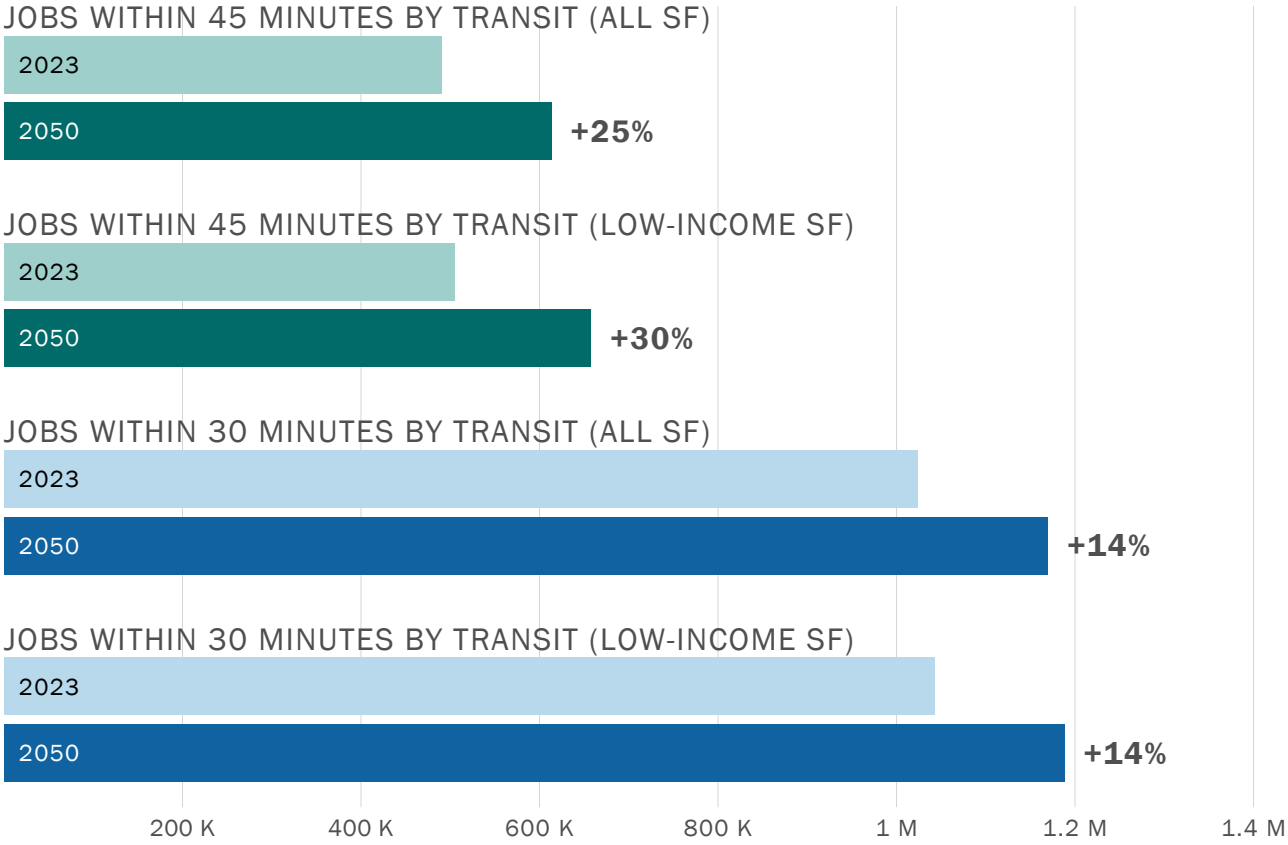


Figure 28. Morning Peak Hour Transit Crowding, 2050 Baseline



Another key metric is job access, which measures the number of jobs accessible to San Francisco residents within a 45-minute transit trip or a 30-minute driving trip and serves as an indicator of economic health. In Figure 29 the 2050 Baseline shows increases in job accessibility by both modes, with a larger increase in jobs accessible by transit for lower income residents. The overall increase in job access is largely due to the increase in the number of jobs in the city and region.

Figure 29. Job Access by Transit, 2023 and 2050 Baseline



Source: CHAMP 7CE
Download chart data (CSV)

Together, these indicators help frame where existing issues may persist or ease, or where transportation investments could improve conditions in the future. These results provide a foundation for evaluation of system performance, prioritization of investments, and alignment of policy responses with San Francisco's long-term mobility and safety goals.

San Francisco Transportation Investment Strategy

For this focused update, the Investment Plan was updated using the needs and project descriptions from SFTP 2050, and approximate revenue estimates based on regional projections. Most of this revenue, over 80% in SFTP 2050, is already committed to specific projects and purposes. The remainder of the expected revenues are discretionary, meaning that there is some flexibility in how they can be invested to improve the transportation system. The Investment Plan and Vision Plan allocate the discretionary revenues based on the priorities identified through public outreach, technical analysis, and known city and regional commitments.

Table 2 presents SFTP investment categories with the total need, Investment Plan funding, and Vision Plan funding. See Appendix C for more details of the needs and investment levels.

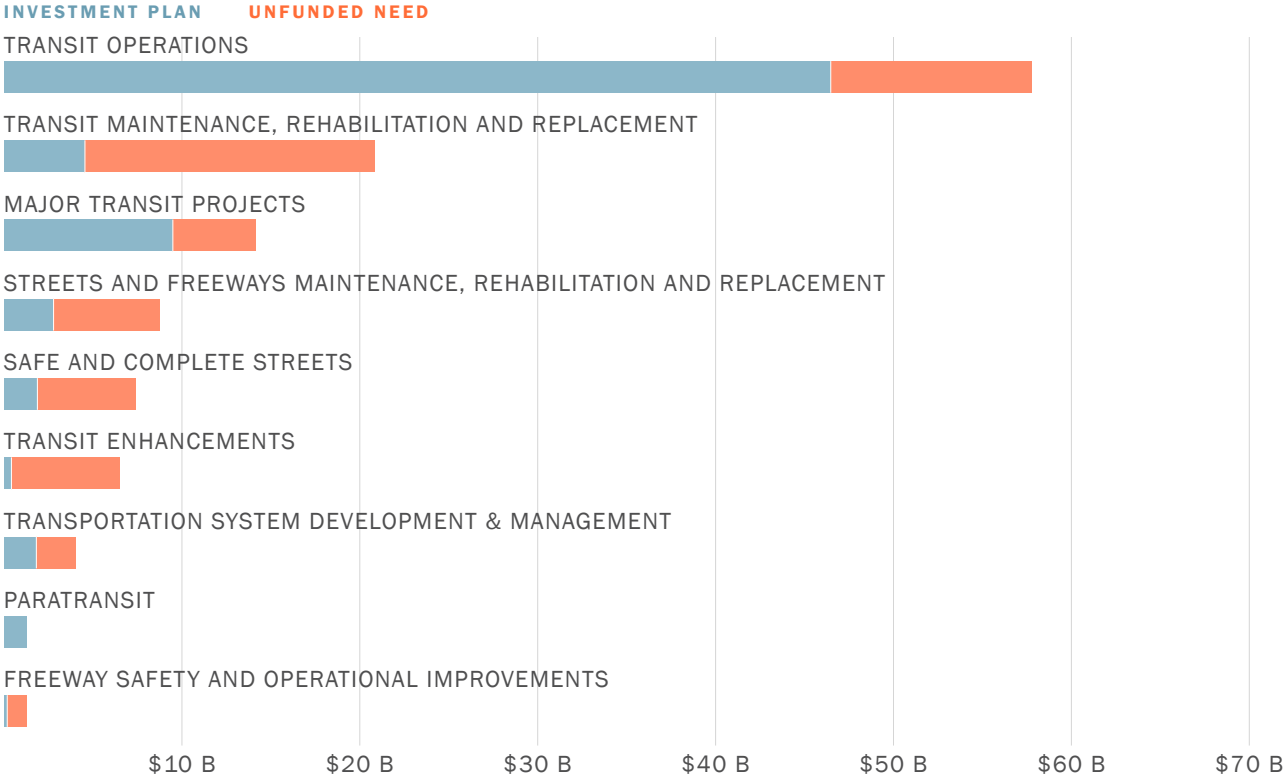
Table 2. SFTP Investment Categories, Total Need, and Investment Levels, in $2020 millions

CATEGORY	TOTAL NEED (FROM SFTP 2050)	INVESTMENT PLAN	INVESTMENT + VISION PLAN
Transit Operations	$57,800	$46,500	$50,400
Transit Maintenance, Rehabilitation and Replacement	$20,900	$4,600	$14,800
Major Transit Projects	$14,200	$9,500	$11,400
Streets and Freeways Maintenance, Rehabilitation and Replacement	$8,700	$2,800	$4,400
Safe and Complete Streets	$7,400	$1,900	$4,700
Transit Enhancements	$6,500	$400	$2,400
Transportation System Development & Management	$4,000	$1,800	$ 4,000
Paratransit	$1,300	$1,300	$1,300
Freeway Safety and Operational Improvements	$1,300	$200	$700
Existing Obligations / Debt Service	$500	$500	$500
Total	**$122,600**	**$69,500**	**$94,600**

THE INVESTMENT PLAN

The SFTP+ Investment Plan includes about $69 billion in revenues for transportation in San Francisco through 2050. Figure 30 shows the Investment Plan categories and investment levels.

Figure 30. Investment Plan Categories, Total Need, and Investment Levels, in $2020 billions



Download chart data (CSV)

The Investment Plan represents a reduction from the SFTP 2050 Investment Plan of approximately 12%. Based on need and public feedback in support of a robust transit system, funding for transit operations, including paratransit, are prioritized. The IP also prioritizes funding for state of good repair needs, such as streets and freeways maintenance and transit capital maintenance. Other projects and programs are prioritized based on the SFTP equity goal and outreach feedback – such as the Bayview Caltrain Station, Equity Priority Transportation Program, and Vision Zero Ramp Safety. In order to fit in the reduced revenue total, reductions in the other categories were required.

TRANSPORTATION DEMAND MANAGEMENT AND PRICING

TDM is a set of policies, programs, incentives, and design strategies that influence how, when, and where people travel. Rather than building additional roadway capacity, TDM focuses on managing travel demand and encouraging more efficient use of the transportation system through encouragement and education, as well as cost-effective transportation policies and traveler incentives. Common TDM strategies include first-mile/last-mile shuttles and shared mobility services, car-share and bike share, demand-based pricing, commuter benefit programs, and mobility wallets. One example of this is the bundling of transit fares into the price of an event ticket at Chase Center, allowing event attendees to ride Muni without paying an additional fare. Pricing is one of the most effective transportation demand management tools available, and the Investment Plan recognizes TDM and pricing as critical strategies for managing future travel demand, reducing congestion, supporting transit, and achieving climate targets. The Treasure Island Transportation Program is effectively one comprehensive TDM package, combining an equitable congestion management toll with expanded transit service and parking management. As San Francisco's economy continues to rebound and the regional economy grows, traffic congestion will also continue to increase — and TDM will play an increasingly important role in San Francisco's and the region's transportation system.

To understand the performance of the Investment Plan, the Transportation Authority evaluated the impacts of the SFTP+ investment scenario using the CHAMP modeling process (see Appendix E) and through public outreach. In SFTP 2050, metrics were identified for each of the five goals. Some of these metrics are quantitative, and some of those quantitative metrics can be modeled, producing projections for the future. It should be noted that the metrics for Safety and Livability and Accountability and Engagement do not lend themselves to modeling and are directly reported results (e.g. fatalities and injuries) or qualitative in nature (public feedback).

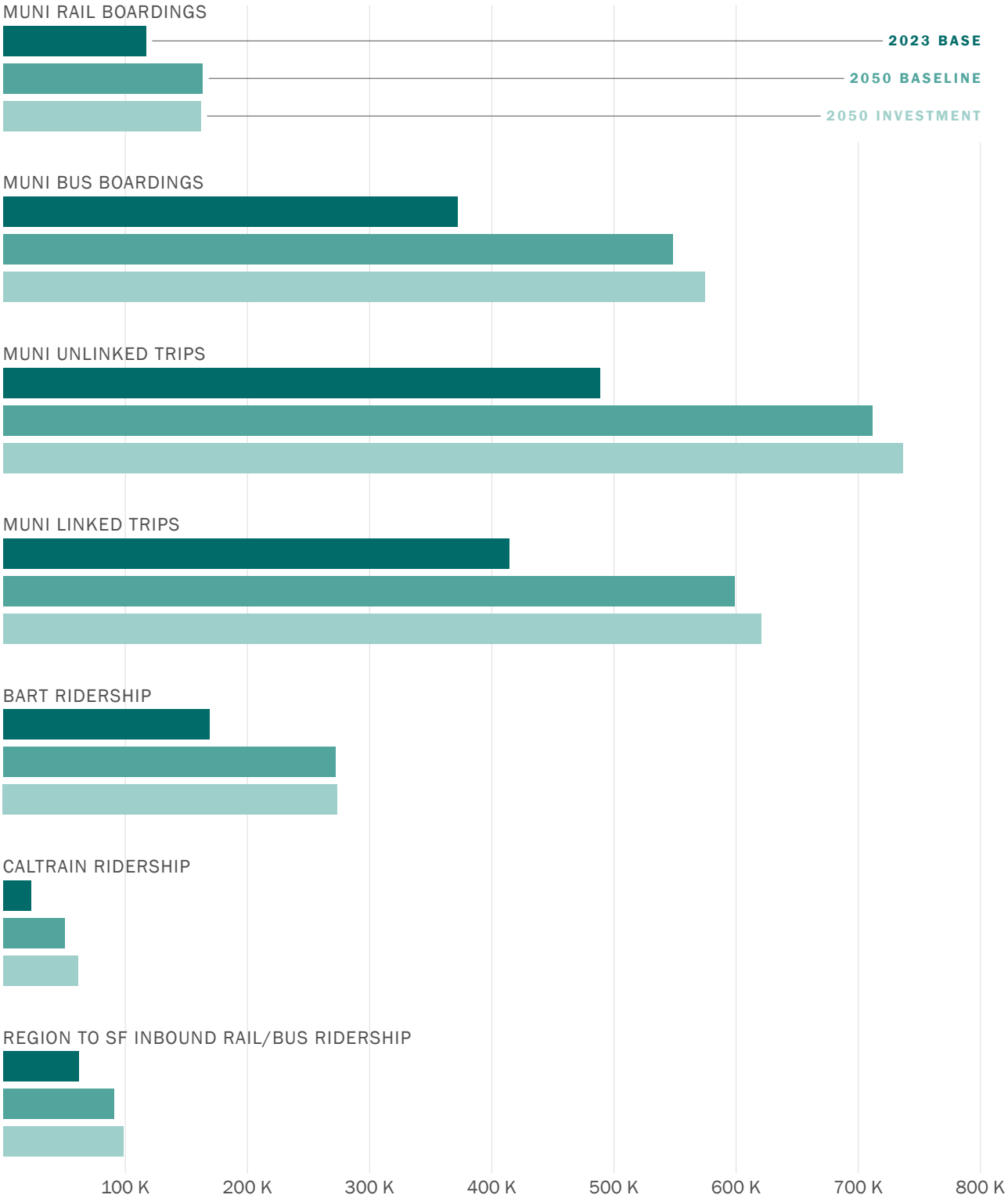
MODEL SCENARIO DETAILS

The impacts of the SFTP Investment Plan on transportation goals are analyzed with the San Francisco Chained Activity Modeling Process (SF-CHAMP). The future year (2050) baseline includes future growth represented by MTC's draft PBA 2050+ growth projection control totals and the San Francisco Planning Department's land use growth distributions; transit service represented by 2025 Muni transit service, 2023 BART frequencies, and Caltrain post-electrification service; and projects that will soon be open or are already fully funded and committed. The Investment Plan scenario has identical land use assumptions to the baseline scenario, all projects in the baseline scenario, and additional projects which can be funded through the Investment Plan detailed in Appendix C. The Vision Plan was not modeled due to the assumption of flexibility in the investment choices described above. The full modeling methodology and results can be found in Appendix E.

The 2050 Baseline was compared against the 2050 "Project" scenario that includes the SFTP+ Investment Plan projects and programs. Key findings include:

- Transit mode share increases by 0.6% from the baseline, reflecting an increase in transit use even though the level of transit service remains unchanged (Equity, Environmental Sustainability)
- Muni ridership increases by 3.5% and Caltrain ridership increases by 22%, due largely to the Portal project (Environmental Sustainability, Economic Vitality). Figure 31 compares transit ridership for various modes between 2023, 2050 Baseline, and 2050 Investment.
  - » While increased transit ridership is positive for our goals, it does result in greater crowding on transit
- Total VMT on San Francisco roads fall by 2%, and per-capita VMT falls by 2.6% (Environmental Sustainability, Equity). Figure 32 compares the VMT per household between the 2050 Baseline and 2050 Investment.
- Job accessibility by transit would increase by 2.9% and access by auto would increase slightly, by about 1.5% (Economic Vitality, Equity). Figure 34 illustrates the change in job access by transit within 45 minutes for San Franciscans.

Figure 31. Transit Ridership, 2023 Base, 2050 Baseline, and 2050 Investment



Download chart data (CSV)

Figure 32. VMT per Household, 2050 Baseline

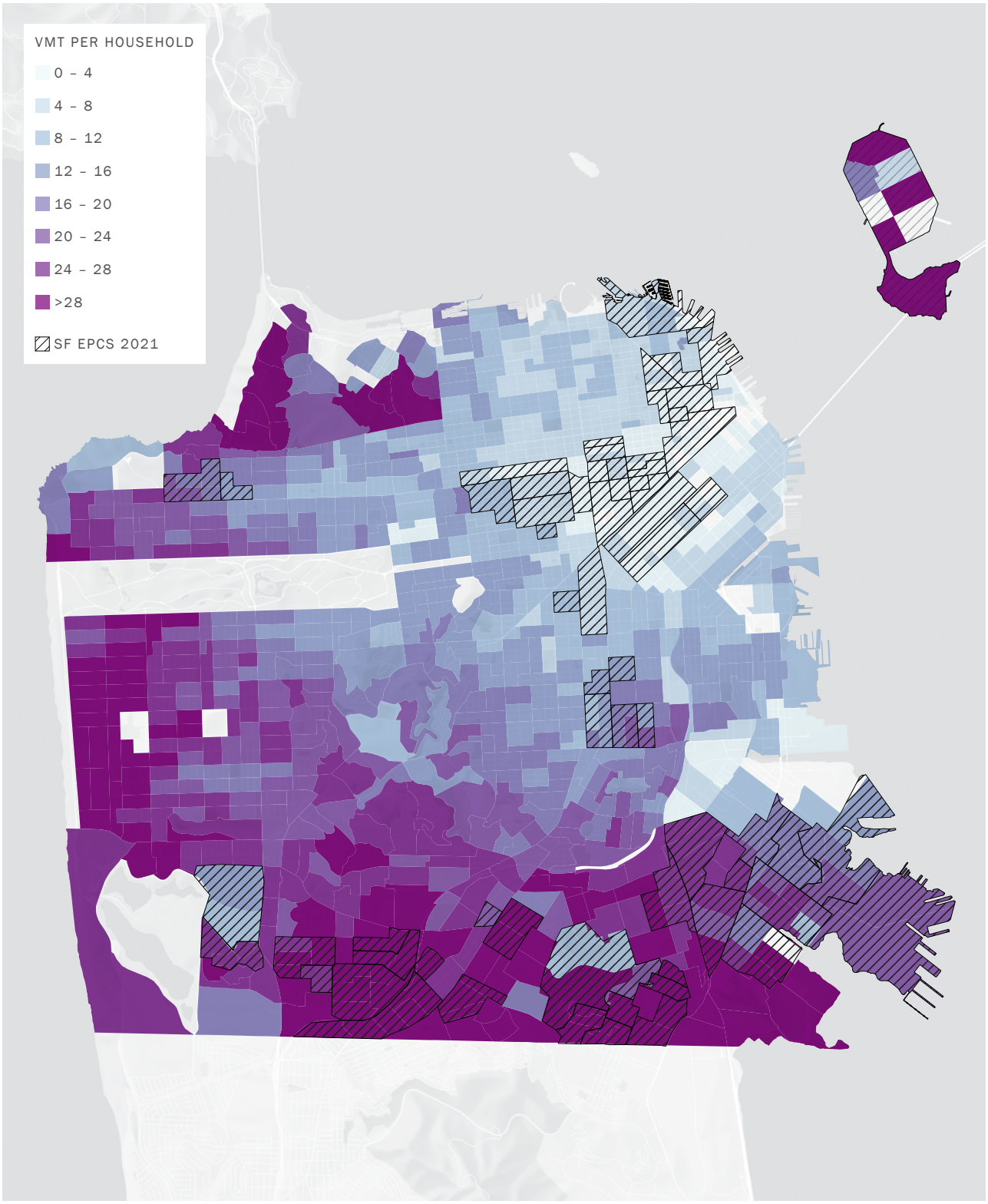


Figure 33. VMT per Household, 2050 Investment

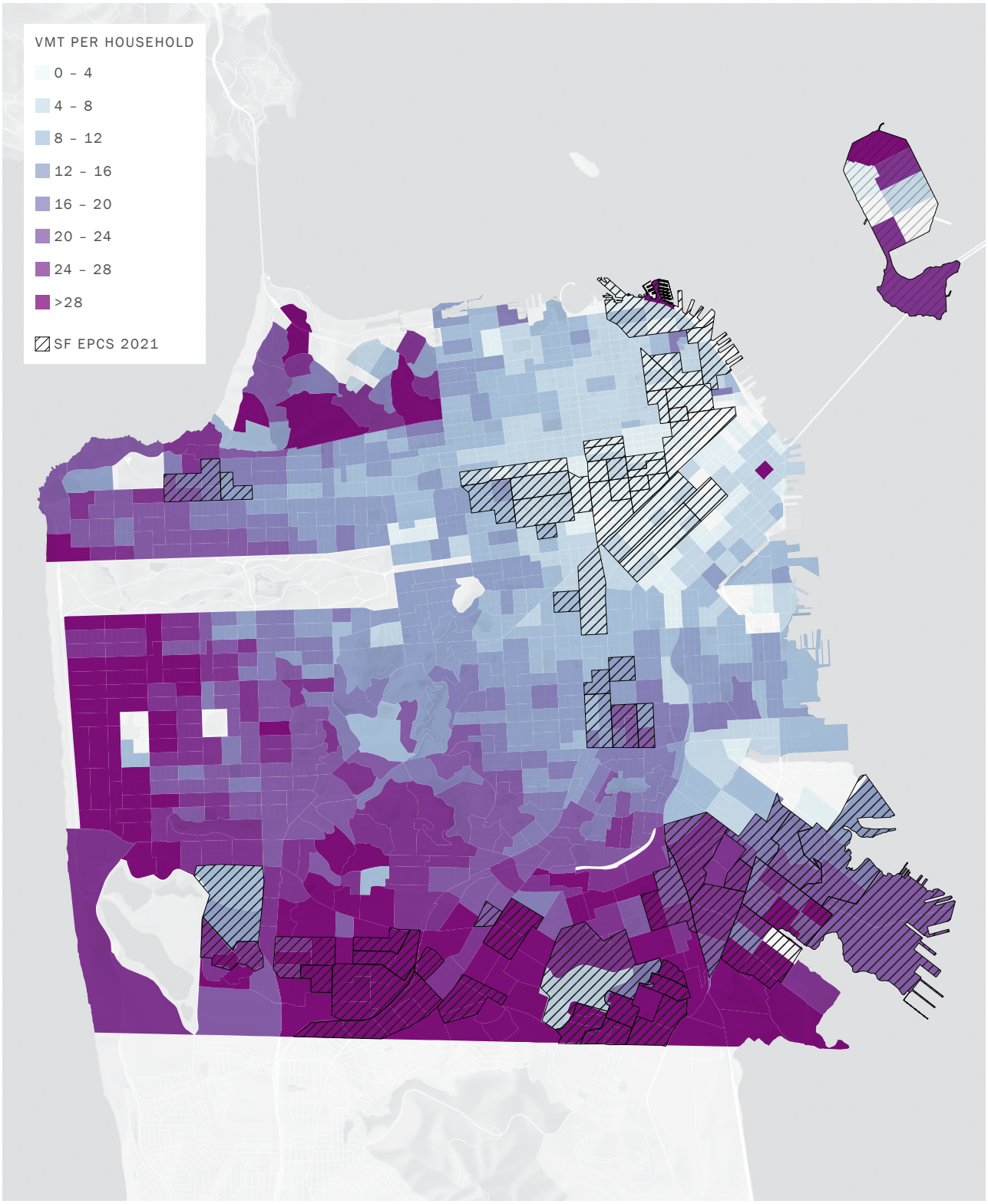
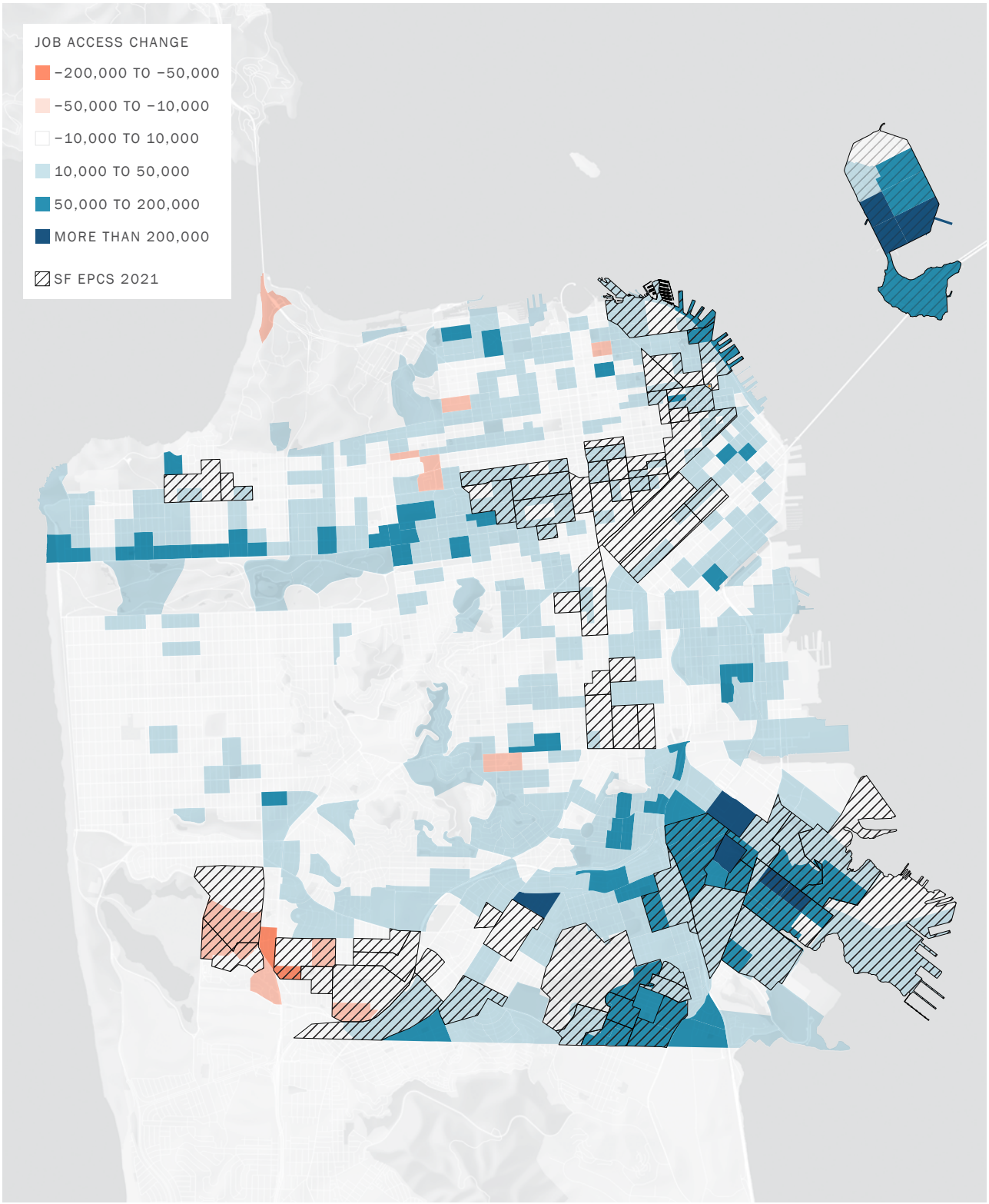


Figure 34. Change in Transit Job Access (45 Minutes), 2050 Baseline and 2050 Investment



Specifically for equity populations, the modeling found:

- Higher transit use and lower auto use for low income people
- Lower VMT for people in downtown EPCs, but higher VMT for EPCs in the southern part of the city
- Lower income residents continue to have slightly higher job access than the population as a whole

Overall, the modeling analysis found that the Investment Plan modestly improves outcomes related to San Francisco's goals.

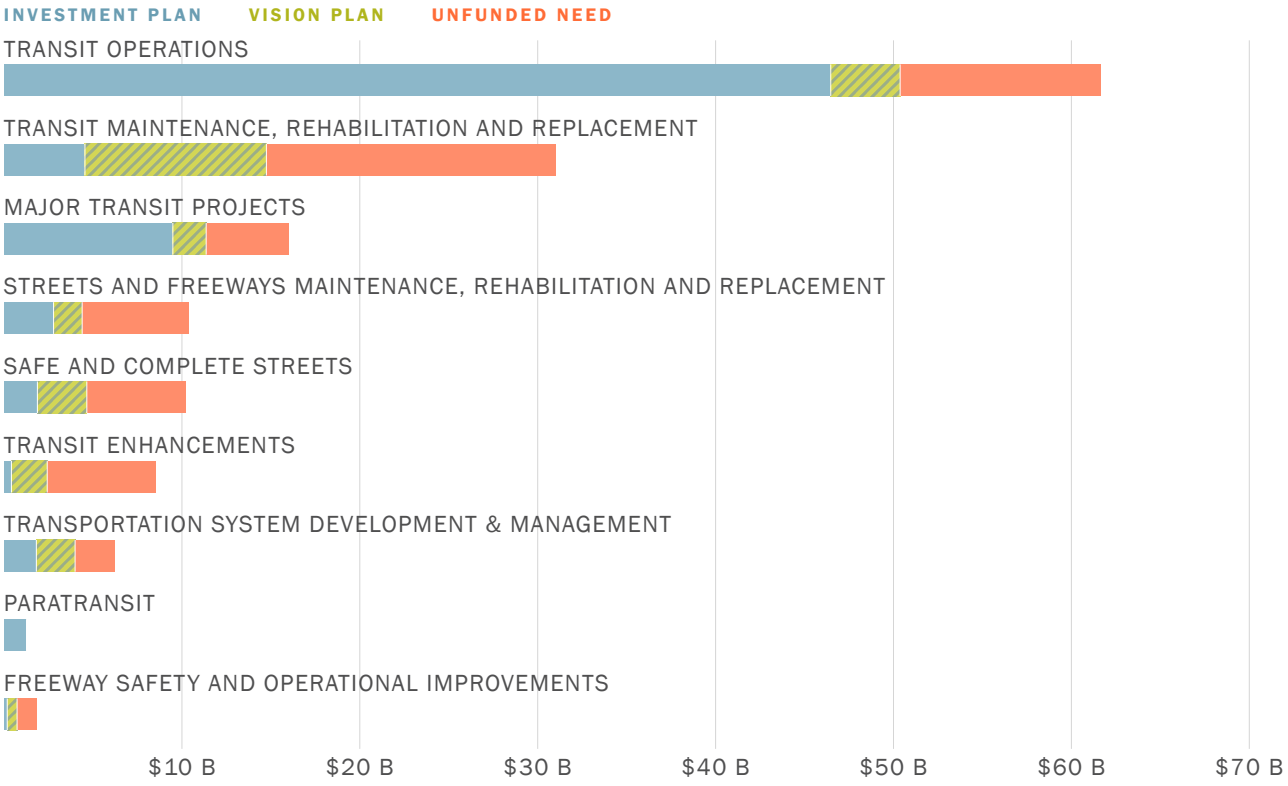
Appendix E describes the modeling methodology and performance results.

The Investment Plan is expected to improve performance on other SFTP metrics that are not modeled. For instance, the Investment Plan includes funding to maintain San Francisco's PCI at a score of 75. The PCI has been at 74 or 75 since 2017. It will be important to continue to address disparities in pavement condition across neighborhoods.

THE VISION PLAN

The SFTP+ also includes a Vision Plan because our transportation needs are greater than the expected revenues for transportation. The Vision Plan builds on the Investment Plan and imagines how to get closer to achieving our goals with significant new revenue sources. The Vision Plan totals about $94 billion, including all of the Investment Plan revenues plus an additional $25 billion in potential new revenue sources. While the types of revenues are not specified, there would likely need to be some combination of new local, regional, state, and/or federal revenues, some of which would likely need voter approval. Figure 35 shows the Vision Plan investment levels and Appendix C includes a detailed list of the revenue allocation in the Investment Plan and Vision Plan.

Figure 35. Vision Plan Categories, Total Need, and Investment Levels, in $2020 billions



Download chart data (CSV)

The Vision Plan builds on the Investment Plan and describes the investment priorities for potential new revenues to close gaps and further advance transportation goals. Like the Investment Plan, the Vision Plan recommends how potential funds would be allocated based on city, regional, and community priorities. The Vision Plan would help deliver the public's priorities expressed during outreach and also moves San Francisco further along its goals.

The Vision Plan directs additional funding to transit operations to improve and enhance existing service, and expand service (e.g. new routes, more express service, more Owl service) in travel markets that are not meeting citywide transportation goals and equity targets. This was a major theme in public feedback – the desire to improve transit frequencies, reliability, and convenience, particularly in outer neighborhoods and EPCs. For example, residents on the west side of San Francisco voiced strong support for a 29 Rapid service.

Additional investments could reduce the capital maintenance backlog for transit agencies to improve transit reliability and safety. Transit maintenance investments, such as facilities rehabilitation and traction power upgrades, are less visible to the public but essential to

the provision of safe, high-quality transit service. Keeping transit infrastructure in a state of good repair also helps keep transit operating costs down. For instance, if transit vehicles are not maintained properly or replaced timely at the end of their useful life, this increases breakdowns, contributes to more unreliable service, and increases routine maintenance costs which are funded through transit agencies' operating budgets. Upgraded facilities can improve worker safety and the efficiency of maintaining transit vehicles. Maintaining capital assets in a state of good repair is a priority that requires both maintenance and modernization. SFMTA's 2026 – 2035 Capital Plan shows a $5.2 billion maintenance backlog (27% of their total capital assets of $19.6 billion), and notes that most major capital projects support the state of good repair by replacing and upgrading aging infrastructure. According to SFMTA, an average of $424 million is needed each year to maintain its assets in a state of good repair. In addition, the Vision Plan also directs funds for San Francisco's state of good repair needs for regional operators like BART and Caltrain.

Further, to make the most out of limited financial resources, investments in State of Good Repair ("SOGR") projects must be combined with improved project delivery. If maintenance projects are completed more efficiently and timely, existing funding could be stretched further. In addition to funding, improved interagency coordination and collaboration; accelerated hiring of needed project staff; streamlined procurement of

ROLE OF TECHNOLOGY IN THE TRANSPORTATION SYSTEM

Technology can be used to improve the operations of transportation systems, improve safety, prioritize between modes, provide information to travelers, and to collect data. The Investment Plan includes various technology-enabled projects like communications-based train control, which enables rail systems to operate more safely and efficiently and offer more frequent service, and transit signal priority systems, which prioritize transit by extending green times for buses to clear an intersection, improving reliability and reducing time spent waiting at traffic lights. The Vision Plan can fund additional technologies, enhancing roadway network performance, addressing congestion, and advancing the goals of economic vitality and livability. For instance, adaptive traffic signals can better balance dynamic auto traffic demand, while traditional fixed signal timings currently provide better corridor coordination and better prioritize pedestrians by ensuring a pedestrian phase. On freeways, real-time information displays can alert drivers to slowdowns ahead, help manage incidents and advise motorists of alternate routes, and express lanes can be equipped to vary tolls in real-time to prioritize high-occupancy vehicles and optimize traffic flow. Cameras and sensors can be deployed for continuous, on-going traffic data collection and traffic management to support planning efforts, inform infrastructure investment decisions and promote efficient operations.

consultants; and additional training for project managers coupled with expanded access to state-of-the-art project management tools and software are needed to make progress on the significant backlog of transit SOGR projects.

Roadway infrastructure investments are critical for the smooth and safe flow of traffic (including transit) and safety for all users. Here, too, the need greatly exceeds the funds available in the Investment Plan, and additional funds are included in the Vision Plan to address infrastructure needs. Nevertheless, significantly more funding is needed to make greater strides toward a state of good repair such as improving San Francisco's streets from its current PCI score of 75 (good) to 85 (excellent). Similarly, while 77% of buildable curb ramp locations have a curb ramp in good condition, there are approximately 8,000 locations where curb ramps are either unbuilt or in poor condition. These types of roadway investments advance our goals of safety and livability.

Additional investment is needed for pedestrian safety improvements, including traffic calming, new street signs and signals, expansion of the Safe Routes to School program, and investments to close gaps in the pedestrian and bike network. During outreach, there was a lot of support for transportation safety improvements, especially for pedestrians and bicyclists. In order to advance the equity goal, improving street safety in EPC neighborhoods and on the High Injury Network is a key part of the Vision Plan.

The Vision Plan can further advance transformative transportation improvements to the transit system and to our major streets and freeways. The Investment Plan provides modest levels of funding to continue planning and project development for major transit projects such as the Geary/19th Avenue Subway, Central Subway Extension, Bayview Caltrain Station; but significant additional funds are

RIDER-FOCUSED TRANSIT IMPROVEMENTS

The Regional Transit Measure, passed by voters in November 2026, included funding for rider-focused improvements that aim to improve the rider experience and support increased ridership. The expenditure plan includes spending for fare programs, including free and reduced-cost transfers; accessibility programs and projects; mapping and wayfinding improvements; and transit priority infrastructure. These improvements are part of MTC's Transit Transformation Action Plan which aims to create a more user-friendly and connected regional transit system.

Both regionally and locally, transit operators are focused on improving transit speeds and reliability by providing signal priority for buses and trains. SFMTA is also providing wheelchair accessible ridehail through its state-mandated Access for All program and piloting a microtransit (on-demand) service in the Bayview, a strategy that was also recommended in the Transportation Authority's District 4 Mobility Study and which is part of the Treasure Island Transportation Plan.

needed to further project development and implementation. Other major initiatives such as the Embarcadero Seawall and Managed Lanes network can also be advanced through the Vision Plan.

Taken together, and despite the significant financial challenges triggered by the pandemic and recent macroeconomic conditions, the investment strategy outlined in this SFTP update has the potential to create positive impacts in San Francisco, setting up San Francisco for a healthy recovery, and advancing our shared goals. Realizing our next generation of transportation investments will require additional revenues to implement needed improvements as outlined in the Vision Plan.

The Vision Plan prioritizes improvements to serve equity priority communities, including the potential to expand transit service for EPC neighborhoods, such as through the implementation of the Muni 29R service. The Vision Plan investments help further advance SFTP goals of economic vitality, environmental sustainability, equity, and safety and livability.

Policy Initiatives

In addition to the projects and programs included in the Investment Plan and Vision Plan, the SFTP identifies select policy topics for further study and advancement. These topics address transportation trends and changing contexts that require further exploration and advancement to inform future investment priorities and policies which combine to help us achieve our shared transportation goals. SFTP 2050 explored a number of policy initiatives; the SFTP+ discusses recent updates for some of the topics.

AUTONOMOUS VEHICLES

San Francisco has been at the center of autonomous vehicle (AV) testing and deployment for over a decade. Today, Waymo, Zoox, and Apollo operate in the city, with additional operators expected to enter the market in the coming years. The Transportation Authority has been studying how AVs might affect San Francisco's transportation goals (safety and livability, environmental sustainability, equity, economic vitality, and accountability) and drafted a policy agenda to help the city navigate that transition.

The central finding is that AVs' potential to advance San Francisco's transportation goals is promising but not guaranteed and requires greater transparency to gauge and shape its trajectory effectively. Whether the technology delivers overall system benefits, or instead compounds existing transportation challenges, will depend on deliberate policy design and active governance, not on market forces or technological progress alone.

Key findings:

- **Safety:** It remains too early to determine whether AVs are safer than human drivers. Safety assessments to date have focused primarily on comparing AV and human crash rates, but a lack of methodological consensus and limited data access prevent definitive conclusions. AV deployments have also surfaced novel operational safety concerns with no clear human-driver comparator, underscoring the need for a broader way of conceptualizing AV safety beyond crash-rates and severity to include resilience factors as AV operations scale.
- **Environment and mobility:** VMT growth is the central risk associated with widespread AV adoption. Research estimates an increase in VMT ranging from roughly 8% to over 80% depending on automation level and ownership model. This could offset per-mile safety benefits of AVs and hinder San Francisco's transit first and congestion management goals as well as local and regional climate targets.

- **Equity:** AVs may offer meaningful accessibility gains for older adults, people with disabilities, and non-drivers, especially through shuttle services as was piloted on Treasures Island's Loop AV service in 2023, but affordability and demand patterns currently favor affluent robotaxi users, potentially widening inequity gaps, and traffic congestion from induced AV trips could hinder bus travel and other active modes.
- **Economic vitality:** AV development presents economic opportunity for San Francisco as a technology hub but poses displacement risk for the substantial driving-occupation workforce. Workforce impacts will require economy-wide attention in coming years. Additionally, increases in VMT and congestion would adversely affect businesses and quality of life.
- **Accountability:** Currently, the regulatory framework for AV deployments concentrates authority at the federal and state levels. San Francisco currently holds little direct regulatory authority over AV operations, and the data needed to assess AV impacts on the City's transportation goals is largely inaccessible to local government and the public and some local costs incurred by cities warrant policy consideration for how best to enable recovery.

To address these findings, the work ahead reflects a four-part policy agenda:

- **Governance:** Advocate for an AV governance structure equipped to responsibly manage the opportunities and consequences of AV integration into San Francisco, including a more formal seat at the table for local jurisdictions.
- **Safety:** Advance more transparent oversight mechanisms for monitoring and evaluating AV safety performance, along with operational requirements for issues such as emergency response coordination and remote operations.
- **Mobility:** Develop policy tools to manage the projected growth in AV VMT and to prioritize transit-first modes as adoption of AVs continues.
- **Equity:** Advance policies to ensure a more equitable distribution of the benefits and costs of broader AV adoption in San Francisco.

CLIMATE RESILIENCE

Since the adoption of SFTP 2050 in 2022, the policy, funding, and risk landscape of climate-related resilience work has evolved significantly. Locally and regionally, agencies have expanded planning efforts and started advancing resilience projects and programs. For example, in 2025 the Office of Resilience and Capital Planning (ORCP) updated the City's Capital Plan and Hazards and Climate Resilience Plan, and the Planning Department's Shoreline Adaptation Plan is underway, expected for completion in 2029. SFMTA is developing the Embarcadero Connectivity Plan. Planning for major capital projects such as the SF Port's Embarcadero Seawall, part of the Port's

Waterfront Resilience Program, and others by local and regional transit operators are also advancing. However, substantial gaps remain between identified needs, grant-ready projects, and available funding to implement solutions.

Working in partnership with ORCP and building on work and processes already in progress, the Transportation Authority can support coordination across federal, state, regional, and local agencies and advancement of San Francisco projects that are technically sound and competitive for funding. Some of these actions include: consolidating and summarizing relevant work completed by various agencies, and coordinating a citywide assessment of climate-related transportation vulnerabilities. These actions can help develop a consistent framework for identifying priority locations and informing resilience funding decisions so that the City is prepared with a pipeline of projects when Federal and state funding opportunities arise. The Transportation Authority could partner with ORCP to convene City, regional and state agencies such as Planning, Public Works, the SFMTA, regional operators and Caltrans to establish a transportation resilience evaluation framework. The framework would evaluate projects based on criteria such as climate risk, network criticality, community benefits (like redundancy or emergency routes), and implementation feasibility (project delivery readiness and funding).

The Transportation Authority can support local efforts and regional initiatives led by agencies such as MTC to explore funding mechanisms (such as Climate Resilience Districts, development-related financing tools, and bond measures). State and federal opportunities may also emerge in the coming years.

As a funding entity, the Transportation Authority could explore opportunities to encourage agencies seeking funding to consider resilience elements and interagency and inter-project coordination earlier in project development. This could take the form of a checklist to guide policy and project development considerations and to encourage projects to deliver co-benefits such as flood protection or enhanced network redundancy.

Finally, the Transportation Authority could focus project development efforts on at-risk areas identified by multijurisdictional partner agencies, such as U.S. 101 near the San Francisco-San Mateo county line. Other flood-prone hot spots that pose threats to the transportation system include Embarcadero and Market, Mission Creek bridges, Islais Creek, and 17th and Folsom.

ELECTRIFICATION

The transportation sector accounts for the largest proportion of San Francisco greenhouse gas emissions at 45%, with 66% of those emissions generated by on-road fuel consumption. Along with increasing transit system use and mode shift, electrification of the transportation sector is one of the most impactful actions the City

can take to achieve the goals established in San Francisco's 2026 Climate Action Plan to reduce emissions by 61% from 1990 levels by 2030 and reach net-zero emissions by 2040. The CAP also outlines a number of actions for the Transportation Authority and city agencies to undertake to support reaching the 2026 Climate Action Plan goals and achieving an objective to transition all registered vehicles in San Francisco to zero emission by 2040 while also reducing VMT by 30% by 2040.

While San Francisco has made significant strides towards electrifying its transportation sector over the last few years, agencies across the city continue to face major challenges. Limited discretionary transportation revenues in San Francisco, partly driven by a shift to remote work and recent economic downturn, combined with federal de-prioritization of EV initiatives are contributing to a scarcity of resources for electrification. Lack of funding remains a key barrier for the electrification of both revenue and non-revenue public fleets which have significant capital costs. For example, SFMTA's 2025 Zero-Emission Vehicle Rollout Plan cites a $1.7 billion need to electrify its maintenance yards and replace its hybrid bus fleet with battery-electric buses to comply with the State's Innovative Clean Transit regulation which requires zero emission transition by 2040. SFMTA's transit fleet is already one of the greenest in the nation and accounts for less than 0.01% of citywide emissions. Most major transit operators–including BART and Caltrain–are already running zero-emission services within city limits, which suggests that further electrifying transit has limited potential to impact San Francisco emissions when compared to electrifying other kinds of vehicles such as privately-owned cars.

Equity in EV adoption is another key issue. Research shows that communities identified as Disadvantaged Communities (DAC) – a California EPA designation broadly defined as areas that suffer from a combination of economic, health and environmental burdens – had just one-third of the EV adoption rates of non-DACs based on data from 2015 to 2021. With these and other challenges in mind, SFTP 2050+ identifies key recommendations to help accelerate progress towards citywide electrification.

- **Seek increased revenues.** The Transportation Authority and partner agencies should identify opportunities for increased and new, flexible funding sources at the local, regional and state levels and review programs under its purview in collaboration with project sponsors to explore funding priority for electrification projects.

- **Advance equity initiatives.** The Transportation Authority can support partner agencies including SFMTA and SFE to develop strategies to provide more resources and education for EV adoption in DACs. Strategies may include identifying funding opportunities to support installation of on-street and off-street EV chargers in areas that experience investment gaps as informed by community feedback, maintaining up-to-date webpages with information on available financial assistance for EVs, supporting establishment of an EV Help Desk as proposed in the CAP, and conducting outreach to inform community members of available incentives and grants that help households purchase or lease EVs. Data regarding EV adoption rates in Equity Priority Communities and other DACs should also be collected on an ongoing basis to help inform where to target incentives and funding.
- **Plan for e-micromobility and goods movement.** Encouraging adoption of e-cargo bikes within the deliveries sector has major potential for mode shift and emissions reductions. The Transportation Authority should identify barriers to adoption of three- and four-wheeled e-cargo bikes and similar devices for deliveries and study the benefits and drawbacks of e-cargo bike operations in bike lanes in partnership with SFMTA. Data collection is also needed to help build understanding of how e-micromobility devices are currently used, especially in regard to e-bikes and the proliferation of "e-motos" which are oftentimes not street legal or require a license to operate. Data would support future planning efforts and informed regulatory action.
- **Explore additional opportunities to support electrification of privately-owned vehicles.** San Francisco is home to almost 400,000 registered automobiles (not including trucks, trailers or motorcycles) as of 2025. While exact figures for how many of those vehicles are privately-owned versus owned by government agencies are not available, privately-owned vehicles likely comprise most of those vehicles. There are over 370,000 households in San Francisco based on the 2020 Census and about 70% of San Francisco households have access to a car. The Transportation Authority should continue supporting efforts such as SFMTA's Curbside EV Charging Permit Program, the San Francisco Port's efforts to advance electric truck infrastructure, and off-street charging initiatives as these programs yield insights into EV charging demand trends and charging system delivery models across the city.

- **Support SFMTA in re-negotiating the State's Innovative Clean Transit Regulation.** As discussed in the MTC's 2026 Bay Area Financial Efficiency Review report, re-negotiation of the transit fleet electrification mandate is one of the most impactful actions that can be taken to reduce ongoing costs for agencies like SFMTA. The Transportation Authority can support SFMTA and other Bay Area transit bus operators by joining advocacy efforts for a formal deferral of the 2040 deadline. While San Francisco remains committed to helping the state reach its climate goals, this potential deferral acknowledges the financial burden the mandate places on transit operators, the trade-off to fund electrification over more services or state of good repair, and the relatively small amount of emissions generated by public transit versus other sources.

NEW REVENUES

Identification of new revenues for transportation capital and operating needs is a critical component to implementing both the SFTP 2050+ Vision and Investment Plans. During the past 18 months, the SFMTA and Controller locally held Muni Funding Working Group meetings to explore potential new transit operating revenues to address Muni's Fiscal Cliff. Capital funding is also needed to address key priorities such as The Portal downtown rail extension, SFMTA's train control and facilities programs and many elements of street infrastructure. Two sources of potential new revenues are discussed below: package delivery fees, and road user charges.

Package Delivery Fee Research

Following the Transportation Authority's Downtown Travel Study that measured the rapid growth in San Francisco's package delivery rates in the post-pandemic area, the SFTP 2050+ team explored the concept of assessing charges on deliveries occurring in San Francisco, at the request of the agency's Community Advisory Committee.

The Transportation Authority's 2025 Downtown Travel Study found that the percentage of San Francisco residents receiving a delivery on a typical weekday grew over 50% from 2019 to 2023. Based on further analysis of 2023 BATS data – which underlies the Downtown Travel Study's findings related to deliveries – it is estimated that San Francisco adult residents received an average of 0.37 deliveries or more per typical day, or 11 or more deliveries per typical month at their home or other location in 2023. Most of these deliveries (77%) consisted solely of packages shipped by companies such as FedEx and Amazon, followed by take-out and prepared food deliveries (10%). While BATS provides some interesting insights into deliveries, it is a limited data set in this regard. For example, BATS did not obtain information on total delivery volumes, only asking respondents how frequently they received deliveries and what types of deliveries they received.

For illustrative, planning-level purposes using BATS data, it is estimated that a charge levied on personal deliveries in San Francisco could generate anywhere from $5 to $50 million annually assuming a flat-fee charge ranging from $0.10 to $1.00 per delivery assessed on 50% of all deliveries received by adult residents at home or another location. Here, the 50% is an arbitrary assumption that stands in as a placeholder to account for potential exemptions and other design features of a delivery charge framework. Further research must be conducted to understand whether the delivery charge framework could be designed in a way that impacts consumer and/or business behaviors to advance specific objectives such as congestion management, electrification, or mode shift.

Delivery charges present an opportunity to improve the city's transportation system by generating revenues and potentially incentivizing changes in behavior or delivery mode that support SFTP 2050+'s Investment and Vision Plans; however there are several steps needed to further explore this concept prior to considering formal development and advancement of a delivery charge framework:

- **Seek additional data.** More detailed data regarding total volumes, modes, and other topics must be obtained to characterize the current impacts of delivery operations on San Francisco's transportation network and inform policy goals, the structure, and use of revenues for a potential delivery charge.
- **Research legal or other implementation barriers.** No major legal or other implementation barriers to advancing a delivery charge were identified as part of initial research, however state law passed in 2018 restricts local agencies from enacting new taxes or fees on groceries (CA Rev & Tax Code § 7284.8) which may be applicable to delivery charges. Additional research is needed to confirm whether any other state or local laws or processes are applicable to a delivery charge.
- **Explore revenue mechanism pathways.** In California, taxes may be imposed by local governments for revenue generation purposes but are typically subject to approval by voters. Tax measures designated for specific uses must receive two-thirds voter approval while general taxes not designated for any specific use may be approved by a simple majority. Fees can be established without voter approval; however, there are typically more restrictions on the use and size of the fee, depending on what kind of fee is pursued. Deciding whether the delivery charge would be a tax or fee would need to consider desired policy outcomes, potential uses of revenues, and input from other agencies, city leadership, impacted businesses, and members of the public.

- **Study fairness and tax incidence.** Additional research is required to understand how a delivery charge would impact households across the city, in particular low-income and Equity Priority Community households, small businesses, and other stakeholders. The Transportation Authority would also explore opportunities to incorporate equity into potential delivery charge frameworks, such as through exemptions and potential uses of the revenues.

State Road User Charge (RUC) Initiative

While local revenues have been the primary source of transportation funding for decades, leveraging those dollars with state and federal revenues is essential as local revenues alone are insufficient to maintain and enhance our transportation system. At the state level (similar to the federal level), the gas tax has been the primary source of transportation revenues for decades. Unfortunately, revenues have declined over time due, in part, to increasing combustion engine vehicle fuel efficiency and use of electric vehicles. Consequently, the state has been exploring a Road User Charge (RUC), which is anticipated to eventually replace and/or supplement the gas tax. A RUC is a kind of user-based fee which typically charges drivers a fee based on how many miles they drive. California has studied RUC since 2014 when the Legislature passed Senate Bill 1077 (DeSaulnier) which mandated a pilot program to test the feasibility of a RUC and establish a Technical Advisory Committee (TAC). Since then, California has completed four major demonstration and pilot projects to help develop a framework for statewide RUC implementation.

Most recently, the 2024 – 2025 Road Charge Collection Pilot evaluated a RUC revenue collection system which tested three mileage reporting methods: a plug-in device (with optional Global Positioning System (GPS)), vehicle telematics which utilize in-vehicle data, and monthly odometer submissions. Pilot program participants were divided into two groups to test two fee types: a fixed fee of 2.8 cents per-mile and a variable per-mile fee based on vehicle fuel efficiency. Participants completed surveys before and after the pilot, and the final report is scheduled for submission to the Legislature by December 2026. Given RUC's potential to stabilize and/or potentially grow the gas tax – a key revenue source for San Francisco road maintenance and safety projects – the Transportation Authority will continue to engage with state RUC efforts by providing input and supporting legislation related to potential implementation of a statewide RUC framework.

Other New Revenue Initiatives

A delivery charge is an example of the myriad new revenue options that the city may consider in the coming years. The Muni Funding Working Group, which was formed to address SFMTA's transit fiscal cliff and was led by the Controller's Office, issued a final report in July 2025 and identified a range of potential funding options to bolster city transportation revenues including a ridehail/autonomous vehicle tax, an increase to the existing parking tax, a new utility tax measure, increased residential parking

permit fees, enacting paid parking on Sundays and evenings, parcel and sales taxes, "gig" and gross receipts taxes and freeway tolling, among other revenue mechanisms. These sources can typically fund capital investment needs as well as operational expenditures, and more work is anticipated to address long-term project and program needs as described in the Vision Plan. Evaluating new local funding mechanisms at the local, state and federal levels – in concert with seeking to use existing revenues more efficiently – is needed to help San Francisco achieve SFTP and citywide goals.

Conclusion

San Francisco's economy is making progress toward recovery and employment has almost returned to pre-pandemic levels. Meanwhile, addressing access gaps, safety and climate protection are top priorities. The revenue forecast is clouded by changes in federal and state policies and priorities, as well as shifts in local and regional sources. Transit ridership is gradually recovering, though traffic congestion, especially on some of our freeways, has been at pre-pandemic levels for several years and is rising.

San Francisco must seize this chance for a healthy recovery: ensuring an equitable, sustainable, safe, and resilient transportation system and travel environment for all. This will rely on continued investment in transit, and also monitoring and managing private vehicle demand and congestion. This effort will be guided by San Francisco's long-standing Transit First policy and our SFTP goals: equity, economic vitality, environmental sustainability, safety and livability, and accountability and engagement across the city.

The next update of the SFTP, expected to be complete in 2030 for the years 2030 – 2060 in coordination with MTC's Plan Bay Area 2060, will reaffirm our shared goals, update travel behaviors and patterns, refresh our revenue projections, and further advance San Francisco's travel system for all. Table 3 below revises the SFTP 2050's Policy Implementation Recommendations based on the last five years' worth of Accomplishments combined with the findings from this SFTP+ focused update. These Implementation Recommendations will be used alongside findings throughout this document to guide our work between now and the next long range plan, the SFTP 2060.

Table 3. SFTP+ Policy Implementation Recommendations

	SFTP 2050 POLICY RECOMMENDATIONS	SFTP+ UPDATE IMPLEMENTATION ACTIONS
1	Fully fund timely transit vehicle replacement and rehabilitation	Support investment to reduce the transit SOGR backlog by focusing on identifying funding for vehicles, guideways, and facilities maintenance for Muni, BART, and Caltrain.
2	Expand transit service while supporting steps to stabilize costs	Continue to work locally and across the region to respond to transit operations funding shortfalls and work to identify sustainable sources of funding for Muni, BART, and Caltrain service.
3	Build the pedestrian and bicycle strategies to establish safer neighborhood networks citywide	Seek to grow investment in the High Injury Network and support establishment of a High Risk Network through the 2025 Safe Streets Act. Advocate to make automated speed enforcement legislation permanent.
4	Create more complete streets (at lower cost) through coordination with repaving	Co-lead implementation of the 2025 Safe Streets Act, hold an annual hearing on progress, establish fund program to incentive coordination of pedestrian and bike safety improvements with paving projects.
5	Increase investment in employer, school, and community trip reduction programs	Complete the TDM Market Analysis and establish the next generation TDM Strategic Plan to prioritize investment in employer, school, and community mobility improvement and vehicle trip reduction programs.
6	Continue rapid transit network development, including bus rapid transit	Complement the rapid transit network with customer-facing improvements that promote system connectivity, accessibility, and improve transit service experience for riders.
7	Continue to coordinate transit investment with land use development plans	Support delivery of OBAG 4 investments
8	Identify the next generation transit network priorities for BART, Caltrain, and Muni	Through SFTP 2060, prioritize among the top five next generation transit network priorities for BART, Caltrain, and Muni, to inform PBA 2060
9	Increase transparency and promote public involvement by sharing agency prioritization and development processes	A) In partnership with implementing agency partners for Prop L and other fund programs, identify specific sectors to focus on further developing and/or communicating agency prioritization processes. Examples include complete streets, residential traffic calming, TDM, signal upgrades and replacements, and/or transit customer amenities. B) Increase transparency and promote public involvement by strengthening relationships with equity priority communities C) advance our knowledge of the effectiveness of our investments in select sectors by supporting consistent before-after evaluation.
10	Continue to develop congestion management approaches including pricing	Complete the SF Freeway Network Management Study and advance the TIMMA multimodal TDM and toll and affordability program
11	Set a vision for managing the city's freeway network	Complete the SF Freeway Network Management Study, including equity and TDM elements, and support the regional update to the BAIFA Express Lanes Strategic Plan
12	Consider all options for delivering projects	Continue to support recommendations from the Transportation Authority's Transportation Capital Projects Delivery Study
13	Next generation policy for emerging mobility and technology	Advance the AV policy recommendations of the SFTP+ 2050
14	Advance climate initiatives	Advance the climate resilience policy recommendations of the SFTP+ 2050, pending fund availability

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