



**Hello and thank you for joining us for the ConnectSF webinar.**

**We will be presenting information about the ConnectSF Statement of Needs and answering your questions.**

**In order to submit a question, please find the chat icon on the bottom of your screen - it looks a little like a thought bubble. You can click that and type in your question.**

**We will pause during our presentation so that we can respond to your questions. We will do our best to get to all questions.**

**If we don't get to your question during this webinar, feel free to email us your question and we'll get back to you. The email is [connectsf@sfgov.org](mailto:connectsf@sfgov.org).**

**A housekeeping issue before we start our presentation:  
Please make sure your computer's microphone remains muted so that unintended sounds are not broadcast during the webinar and that your video stream is disabled.**

**Again, thanks for joining us - and let's jump into the presentation.**

# Today's Agenda

1. Overview
  - About ConnectSF
  - Purpose and Inputs of Statement of Needs
2. Findings from Statement of Needs
3. Next Steps
4. Data Visualization Walk-through

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**Here is the agenda for today.**

**First we'll give an overview about ConnectSF and the Statement of Needs -- what it is and what it's for.**

**Next we'll discuss the findings from the Statement of Needs.**

**After that we'll discuss next steps.**

**Finally we'll walk you through one of the data visualization maps we prepared to help illustrate some key findings that came out of the Statement of Needs.**

## About ConnectSF: Partnership and Collaboration

**ConnectSF** is a multi-agency process to build an effective, equitable, and sustainable transportation system for San Francisco's future



San Francisco  
County Transportation  
Authority

San Francisco  
**Planning**



**ConnectSF**

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**A quick recap of ConnectSF.**

**ConnectSF pulls together the City's transportation planning efforts into one coordinated program.**

**Our agencies are collaborating to streamline long-range transportation planning efforts.**

**Through our partnership, we will identify major transportation investments and policies that are needed for the next 50 years.**

**We also integrated land use into our transportation planning efforts since these two areas are related and interdependent.**



**In the spring of 2018, we completed the first phase of work for ConnectSF, which many of you were a part of.**

**This involved developing a Vision for what the City will be like in 50 years.**

**This work was informed by an extensive outreach process, which included members of the Futures Task Force.**

**Briefly, the Vision is one where:**

- **San Francisco is a growing, diverse, equitable city.**
- **There is a multitude of transportation options that are available and affordable to all.**
- **There is faster project delivery resulting from strong civic and government engagement.**

# About ConnectSF: Goals



Equity



Environmental  
Sustainability



Economic  
Vitality



Safety &  
Livability

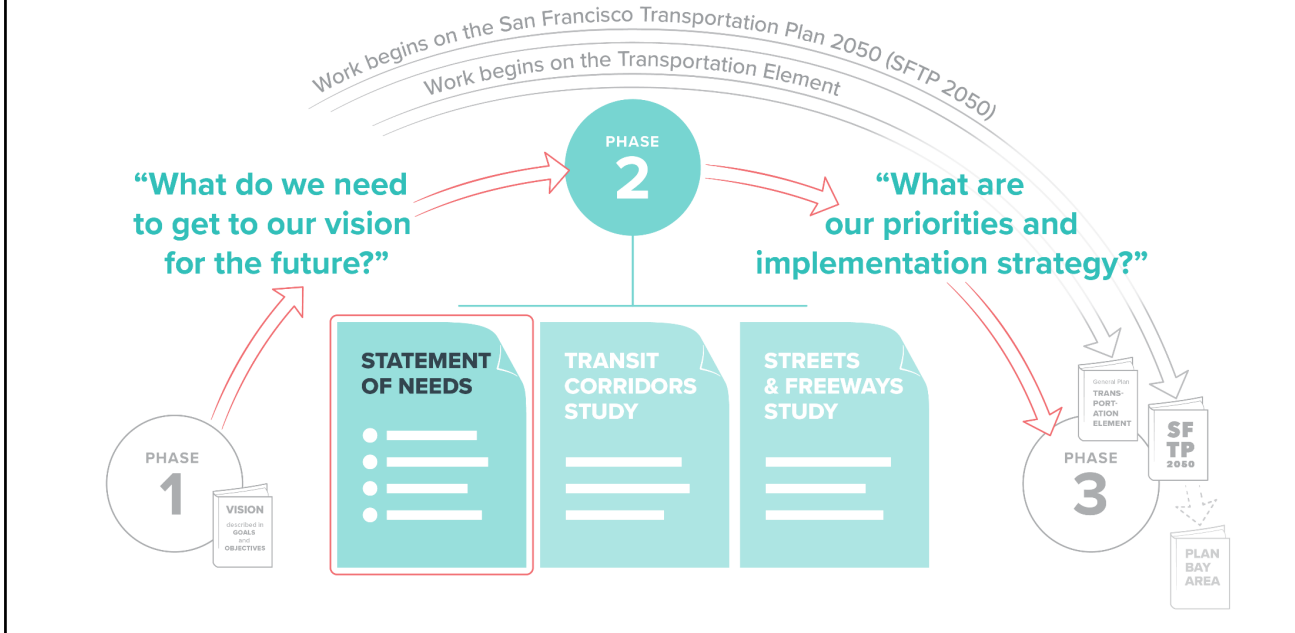


Accountability  
and Engagement



**These are the 5 goals that shaped the ConnectSF Vision and guide the city’s long-range transportation planning work moving forward.**

# About ConnectSF: Overall Process



That was Phase 1 of ConnectSF: to lay the groundwork and create a long-range vision that would frame the rest of the work that we do.

We're now in Phase 2. During this phase we'll focus on needs and challenges for the future given our current transportation system and the projects we have planned.

Today's presentation focuses on the Statement of Needs. If we want to reach the Vision, then we need to:

Understand where we are today (baseline)

and then

Identify gaps or deficiencies we have to close to reach the Vision.

Those challenges are discussed in the Statement of Needs.

To meet the challenges we spell out today, we will develop project concepts for our transit, streets and freeway networks as a part of Phase 2.

In the next phase of ConnectSF, we publish two main items: The San Francisco Transportation Plan (SFTP) and a new Transportation Element for the General Plan.

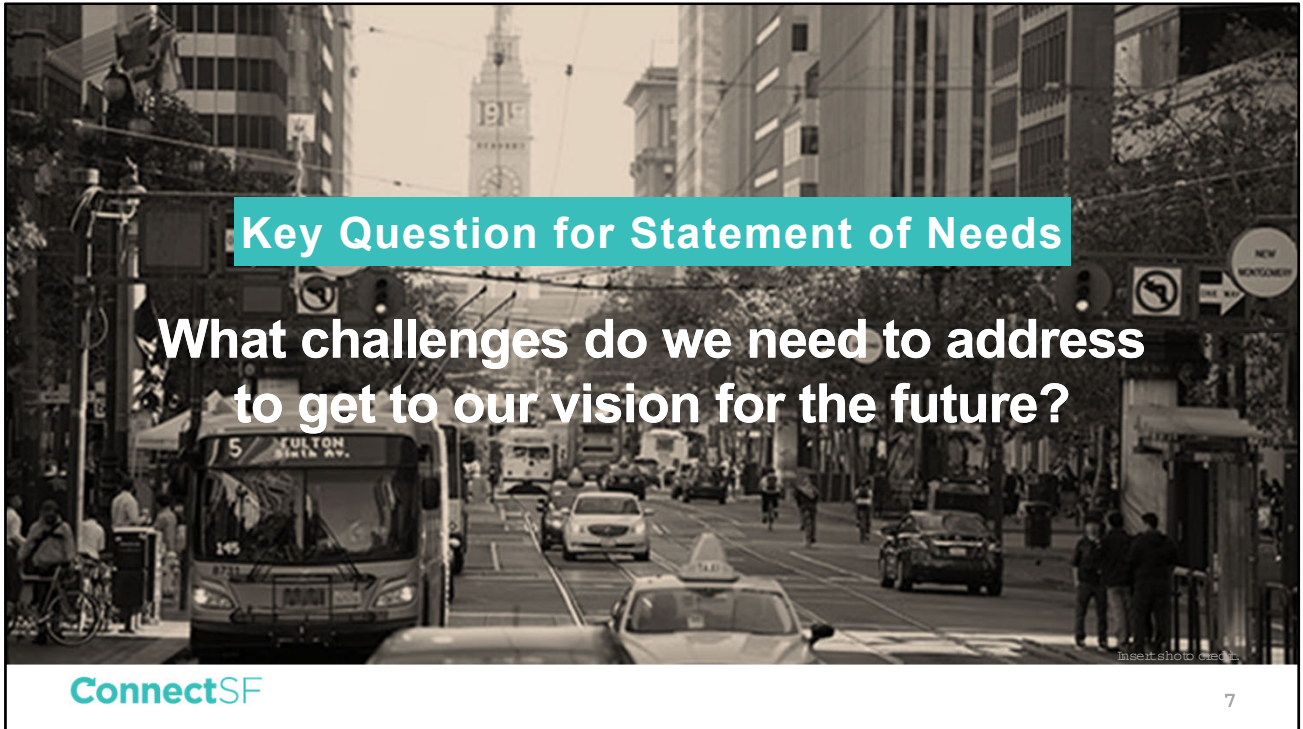
The San Francisco Transportation Plan is the citywide, long-range investment and policy blueprint for San Francisco's transportation system. The plan analyzes every

**transportation mode, every transit operator, and all streets and freeways every four years.**

**The projects prioritized in the San Francisco Transportation Plan will inform Plan Bay Area, the region's long-range transportation and land use plan.**

**The Transportation Element of the General Plan will guide the city's transportation policy and projects in the coming years and codifies them in city code.**

**Priorities for transit, streets and freeways will be formalized as policies in a new Transportation Element that ConnectSF will develop for the General Plan.**



**The Statement of Needs establishes a baseline understanding of how San Francisco’s transportation system is performing today and in the future.**

**The Statement of Needs seeks to answer the following questions:**

- **Does this performance meet the goals and aspirations set out in our Vision?**
- **If it doesn’t, what are the gaps or areas where we need to do additional work to reach the Vision?**

**We used SFCTA’s travel model to understand current and future conditions, and identify key challenges for ConnectSF to address.**

**The major inputs into the travel model were land use and the transportation system.**

**We then developed metrics corresponding to the Vision’s goals and objectives.**

**The travel model gave us outputs for 2015 to measure conditions today and for 2050 as our future year.**



# We Will Continue to Grow

San Francisco			
	2015	2050	% Change
<b>Population</b>	880,000	1,245,000	29%
<b>Jobs</b>	745,000	924,000	24%

Bay Area			
	2015	2050	% Change
<b>Population</b>	7,330,000	10,350,000	41%
<b>Jobs</b>	3,798,000	5,059,000	33%



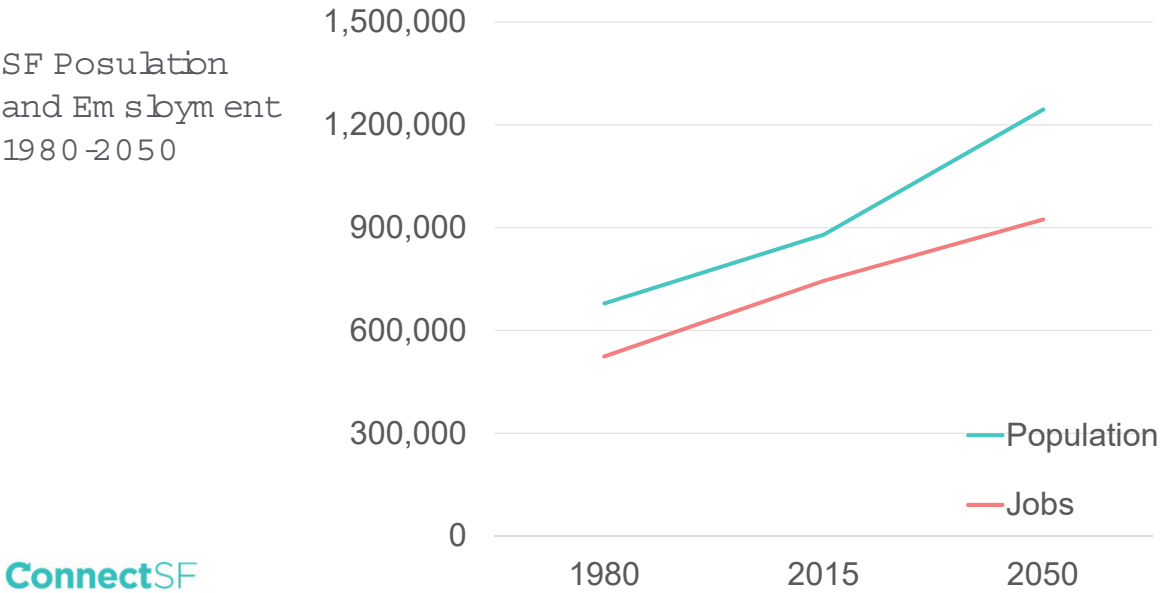
Let’s talk about population and job growth first to get a sense of the big picture for 2015 and 2050.

San Francisco will continue to grow because it is and will be an attractive place to live and work. The rest of the Bay Area region will grow even more than San Francisco.

Our growth projections are based on the development capacity including adopted plans and policies, like:

- accessory dwelling units,
- state density bonuses,
- HOME-SF
- Citywide development sites
- Large developments and plan areas

# We Will Continue to Grow



Employment is expected to grow at historical rates, around 5,000 jobs annually.

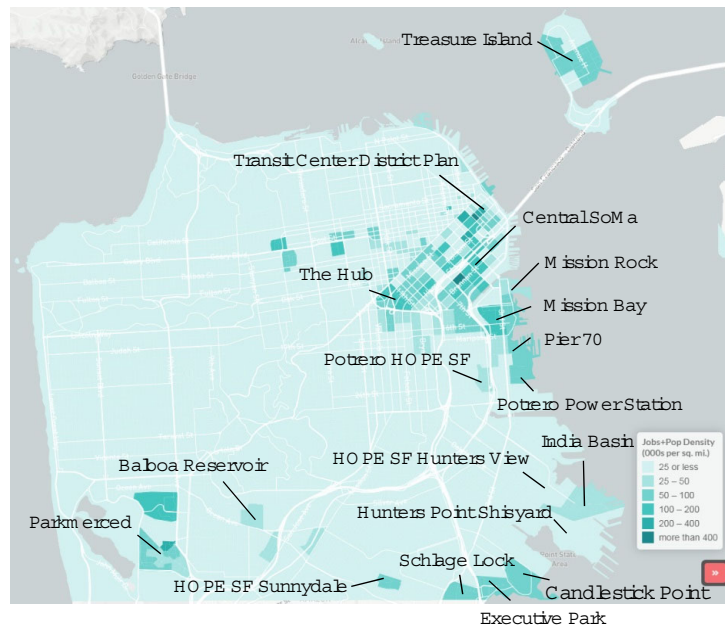
Population is expected to grow faster than it has historically.

In the previous 35 years, population growth was just under 6,000 people per year. In the future, we are projected to grow about 10,000 people annually.

# Where Are We Growing?

## 2015-2050 Change in SF Population and Employment Density

Based on adopted plans, policies, and entitlements



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### Where will this projected growth go?

Here we show the projected change of where people live and work from 2015 to 2050. The vast majority of planned increased growth will occur in the eastern parts of the City. This includes these major developments and area plans.

# Transportation Network in Model

## What is included in 2015 network:

- 2015 local and regional transit network
- 2015 bike network
- 2015 roads, freeways, tolls, parking costs
- TNCs (e.g., Uber, Lyft)

## What else is included in 2050 network:

- Planned local and regional transit projects (e.g. bus rapid transit [BRT], Downtown Extension)
- Planned bike network projects

## What is not included in 2050 network:

- Congestion pricing
- New concepts e.g. second transbay BART crossing

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**For the year 2050, we took the transportation network assumptions from Plan Bay Area 2040. These include large infrastructure projects in the region and transit capacity improvements.**

**Examples include:**

- Geary Bus Rapid Transit
- Central Subway
- Caltrain Downtown Extension and expanded service
- More BART service through SF's core
- Express lanes on US 101 and I-280

**Let's review what we just discussed:**

**The major inputs into the travel model are land use and the transportation system.**

**The model will give us a baseline understanding for existing and future conditions if we did no further planning.**

**Our follow-on studies will identify project concepts and policies based on these needs.**

# Any Questions?

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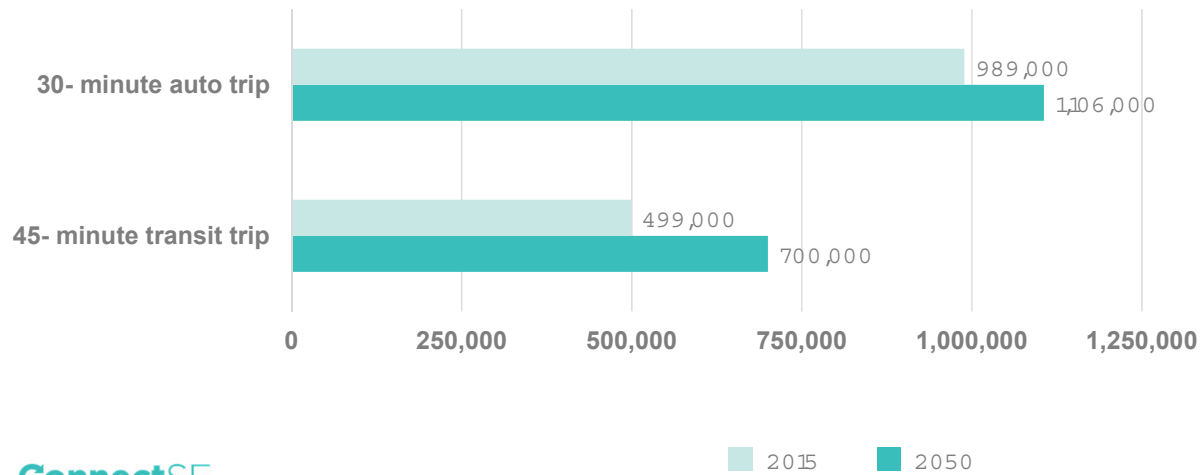
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**We'd like to pause here to respond to some of your questions.**

**We will now present about some findings of the Statement of Needs.**

# More Jobs are Accessible

## Number of Jobs Accessible by Mode



In the next few slides, we highlight a subset of the metrics we looked at and will summarize key findings from the Statement of Needs.

The information presented reflects a typical weekday.

Some good news first. More jobs are accessible to San Francisco residents in 2050.

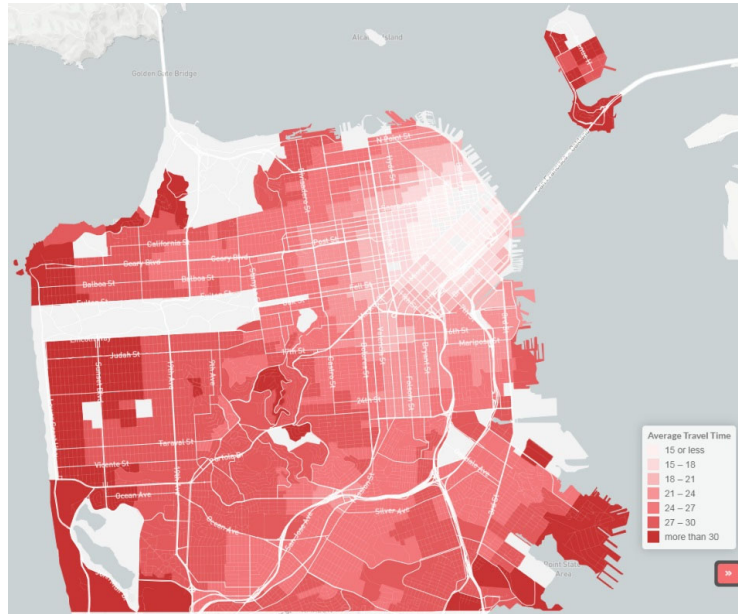
There is a greater absolute increase in the number of jobs accessible by transit than there is by auto.

This tells us that San Francisco and other cities are putting jobs closer to transit OR our planned transit improvements are having a positive effect on accessibility - meaning our Transit investments are generally going to the right places.

Note that people can still get to a lot more jobs by car in 2050 compared to transit. To meet our goals the strategies we develop in the next part of ConnectSF should strive to make more jobs reachable by transit.

# Commute Times Stay the Same

**2050 Average  
Commute Time  
(minutes)**



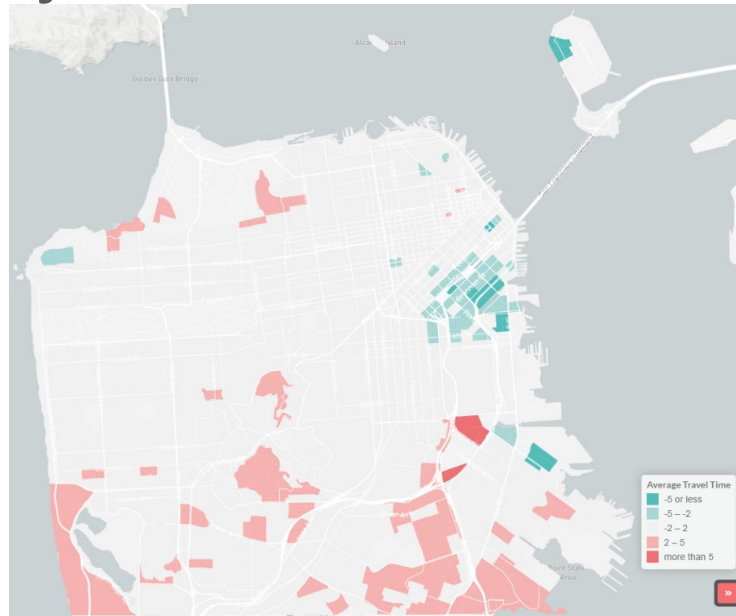
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**Despite the population and job growth, overall commute times change little.**

**Residents who live on the outer edges of the city, still tend to have longer commutes (as shown by the darkest red on the map).**

## Commute Times Stay the Same

2015-2050 Change in  
Average Commute Time  
(minutes)



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While it's good that average commute times are not changing, the pink shows that commutes in southern neighborhoods are growing longer while...

The teal tells us commutes in areas South of Market and some of the Eastern neighborhoods get shorter.

This is one of the metrics where we are seeing showing uneven outcomes across the city.



# Projected Outcomes are Unequal

CoCs are Communities of Concern

## Commute Times (minutes)

	2015	2050	% Change
CoC	21.7	23.0	+6%
Non-CoC	25.1	25.0	0%

## Share of Population with Access to High-Quality Transit

	2015	2050	% Change
CoC	94.1%	90.5%	-3.9%
Non-CoC	85.3%	88.6%	+3.9%

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In addition to citywide analysis, we wanted to look at results with an equity lens.

For that reason, we looked at how the transportation network is working for Communities of Concern in the future.

Communities of Concern are defined by MTC as populations and communities that could be considered disadvantaged or vulnerable.

People who live in areas identified as CoCs have shorter commute times and better transit access now and in the future. However, in the future...

- Commute times for CoCs worsen.
- The share of CoC with access to high-quality transit declines.

Access to high-quality transit is defined as living within:

- 0.25 miles of a rapid bus or light rail stop OR
- 0.5 miles from a BART, Caltrain or Muni Metro stop

## Projected Outcomes are Unequal

CoCs are Communities of Concern

### Number of Jobs Accessible by 45-minute Trip on Transit

	2015	2050	% Change
CoC	512,800	674,000	+31%
Non-CoC	492,300	712,000	+45%

### Number of Jobs Accessible by 30-minute Trip by Car

	2015	2050	% Change
CoC	996,700	1,072,600	+8%
Non-CoC	985,800	1,122,300	+14%

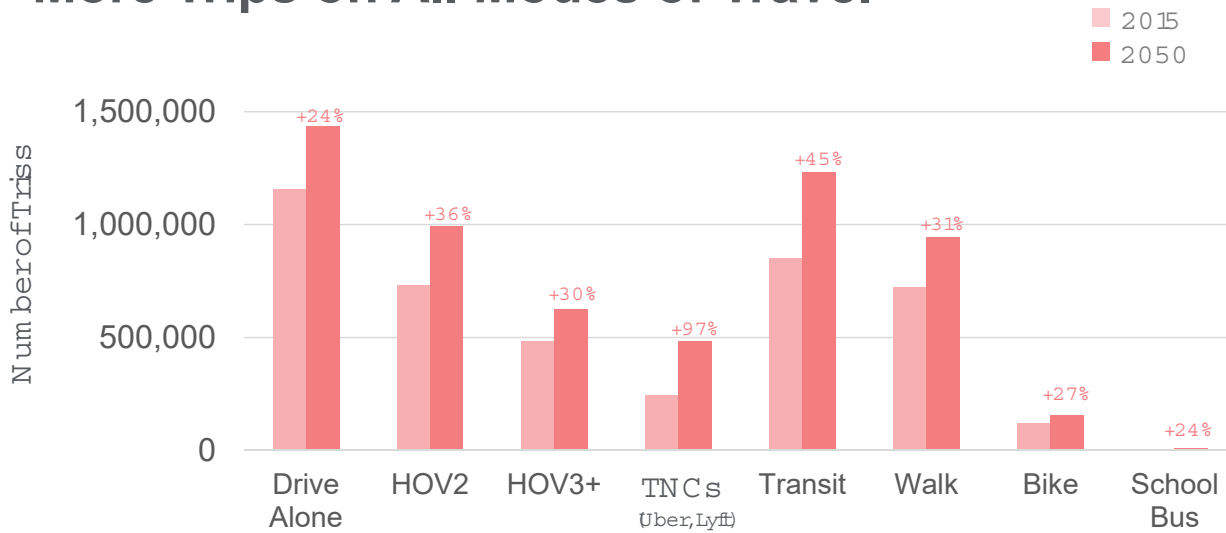
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**We also see that everyone is increasing their access to jobs but CoCs are not seeing as large an increase as non-CoCs.**

**This tells us that to meet our goals we need to focus on creating equitable outcomes for CoCs.**

## More Trips on All Modes of Travel



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Now let's take a look at how people get around the city.

San Francisco is already one of the most sustainable cities in the country when it comes to transportation. The City is pushing itself to go even further, and has set an aggressive goal of having 80% of trips by sustainable modes by 2030.

According to the model, overall mode share will not change drastically, absent new policies and infrastructure investments.

What does the model say about trends citywide?

- Trips by all modes of travel are increasing, due to more people and jobs.
- The greatest absolute increase in trips is on transit.
- But trips using "auto" modes increases more than trips using "sustainable" modes.
- The greatest relative increase in trips is by TNCs.
- At the neighborhood level, We're losing ground in neighborhoods that have typically had the highest sustainable mode usage

## Personal Miles Driven Increase for SF Residents

### Change in Personal Miles Driven per Capita 2015-2050

	2015	2050	% Change
San Francisco	6.5	6.6	+1%
Bay Area	16.4	14.9	-9%

Personal Miles Driven are the number of miles a person travels in a car whether it is their own car, carpool or TNC.

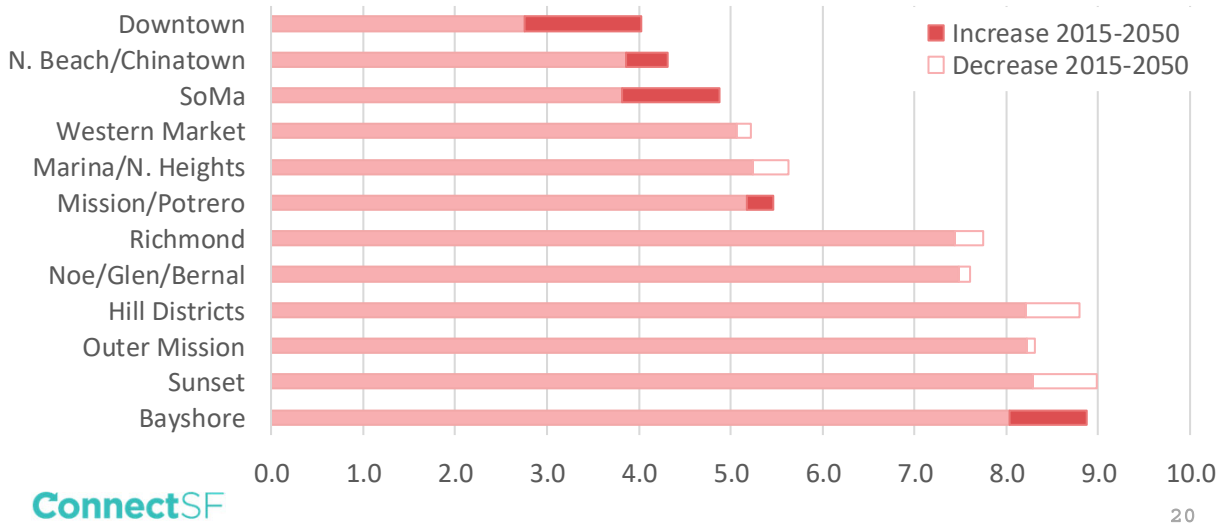
**San Francisco's already-low Personal Miles Driven helps the Bay Area achieve its greenhouse gas reduction goals in 2050.**

**"Personal miles driven" measures the amount of driving done for all trips within, to, and from San Francisco. While Personal Miles Driven per capita in SF is less than half the region as a whole, we see this number increasing a fraction while it drops in the Bay Area overall.**

**Since our personal miles driven numbers are already low, it is more challenging for San Francisco to do better in the future.**

# Personal Miles Driven Increase

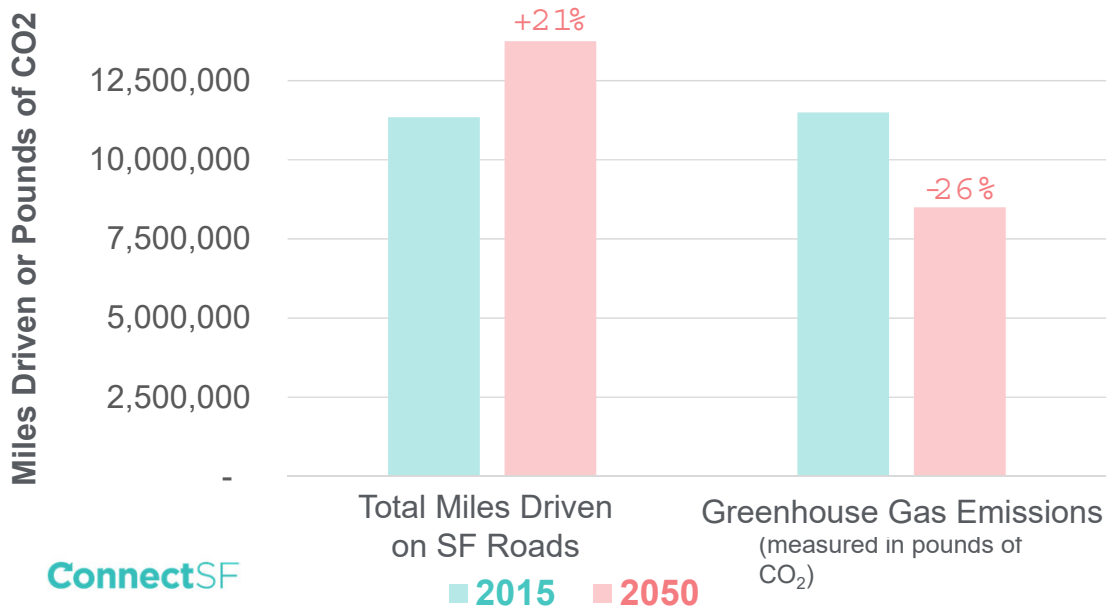
## Change in Personal Miles Driven per Capita by District (2015-2050)



**We risk losing ground in neighborhoods that have typically been doing the best and had the lowest Personal Miles Driven per capita (as shown by the dark red).**

**We're doing slightly better in neighborhoods that have typically had the highest Personal Miles Driven per capita (as represented by the white portions of bars).**

## Total Driving and Emissions in San Francisco



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**This slide represent miles driven and greenhouse gas emissions for all cars driving in SF.**

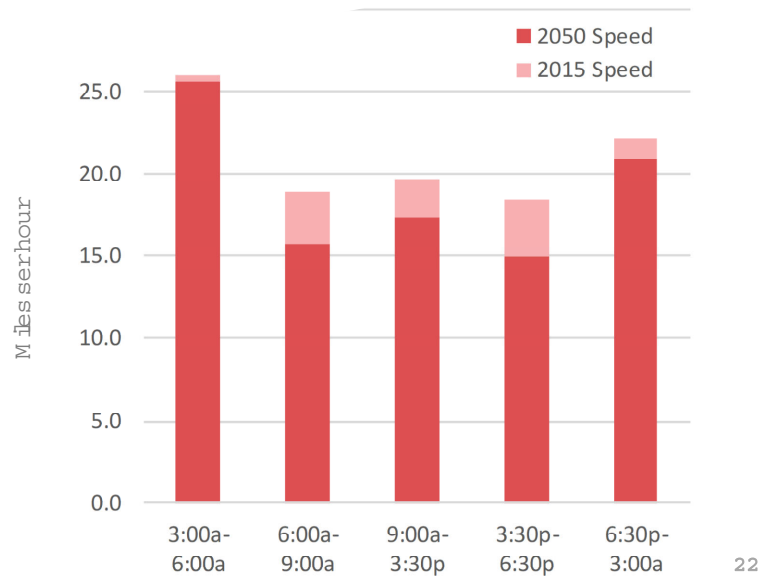
**While overall driving is projected to increase, emissions are anticipated to fall.**

**We anticipate emissions from transportation to decline due to technological advancements and continued fuel efficiencies as adopted in state law.**

**However, our City has set ambitious goals of eliminating emissions that we will not meet without implementing additional strategies.**

# Auto Speeds Decline; Congestion Gets Worse

Change in Speeds by Time of Day for all roadways in San Francisco



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The model results also project an increase in traffic congestion in 2050.

This tells us that we'll need policies to manage congestion and make better use of our limited roadway space.

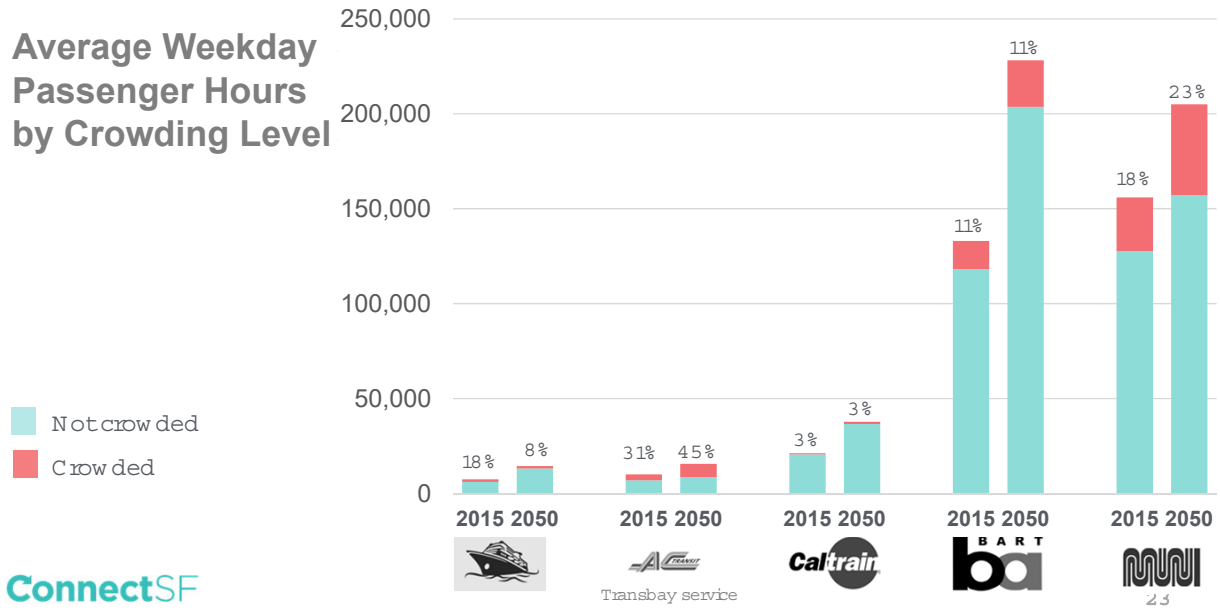
Without intervention, roadway speeds will drop, especially during the peaks and midday – down about 15% over 30 years.

This chart shows the change in speed for all roadways including freeways.

The greatest speed declines are in those neighborhoods that are experiencing the greatest growth and on freeways

# Transit is More Crowded

Average Weekday Passenger Hours by Crowding Level



Transit becomes more crowded despite planned service and capacity increases

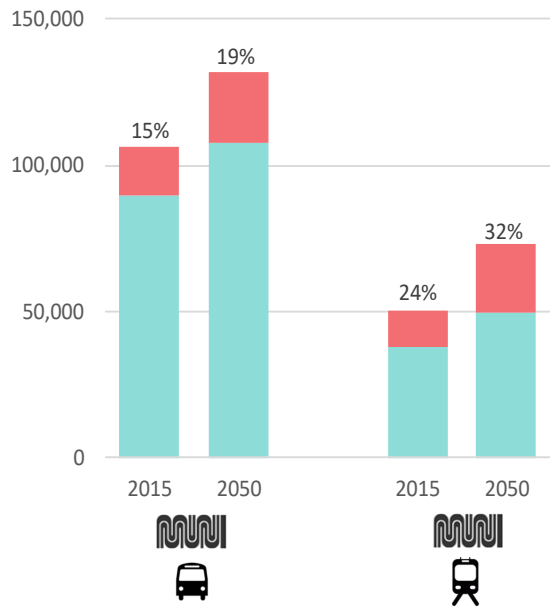
The share of passenger hours on Muni that are crowded increases from 18% to 23%.



# Transit is More Crowded

Average Weekday Passenger Hours by Crowding Level – Muni

Not crowded  
Crowded



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**This figure shows that buses are the workhorses of SF's transit system with more than double the passenger hours of rail.**

**Muni crowding is worse on Muni rail than on buses, and the share of passenger hours on Muni rail that are crowded increases from 24% to 32%.**

# Transit is More Crowded

## 2050 AM Passenger Crowding Level

M uniBus



M uniRail



RegionalTransit



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**Transit crowding continues to persist for access to Downtown.**

**It is expected to be pronounced on the Market, Mission, Central Subway and Transbay corridors**

## Key Findings

### Where We Are Making Progress



ECONOMIC  
VITALITY

**Planned growth increases housing and jobs**

**SF residents have increased transportation access to jobs**

### No Change

**Average commute times stay the same citywide**

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**In summary, we are seeing planned growth increasing housing and jobs.**

**We also know that the gap between the jobs access by transit vs. car is closing with residents gaining a significant increase in the jobs that they can access by transit.**

**And then while it's good the average commute times are not changing citywide considering our expected growth, performance is uneven across different parts of the city.**

# Key Findings

## Major Challenges to Address



EQUITY



ECONOMIC  
VITALITY



ENVIRONMENTAL  
SUSTAINABILITY

### Inequitable outcomes in CoCs

- Commute times worsen
- Access to high-quality transit drops
- Access to jobs by both auto and transit lags behind non-CoCs

### Sustainable modes lose ground

- Falling short of the mode share goal
- Total miles driven increases (Climate Action Plan Goal is to decrease)

### Increased congestion and transit crowding

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Through our Statement of Needs analysis, we recognize that our planned investments won't get us to where we need to be in 2050.

To move toward the Vision:

**We need to create equitable outcomes for CoCs**

**We need to do more to advance toward citywide sustainability goals, and**

**We need to manage congestion and improve transit service to achieve equity, environmental sustainability and economic vitality.**

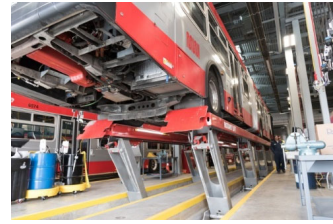
## What Else is in the Statement of Needs?



**Accountability & Engagement**



**Safety & Livability**



**State of Good Repair**



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**Sea-Level Rise**



**Travel Patterns**

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**We've shared a snippet of what will be in the full Statement of Needs report which we will release in late summer.**

**There are some areas of study that we do not currently model in the future, such as fatal collisions and injuries on our streets, or demographics such as ethnicity and disability status.**

**These areas are still important and we've compiled a comprehensive collection of available present-day data to assess our current conditions.**

**These include our progress towards Vision Zero, project delivery metrics, and maintenance and repair needs.**

**These results will be included in our Statement of Needs.**

# Any Questions?

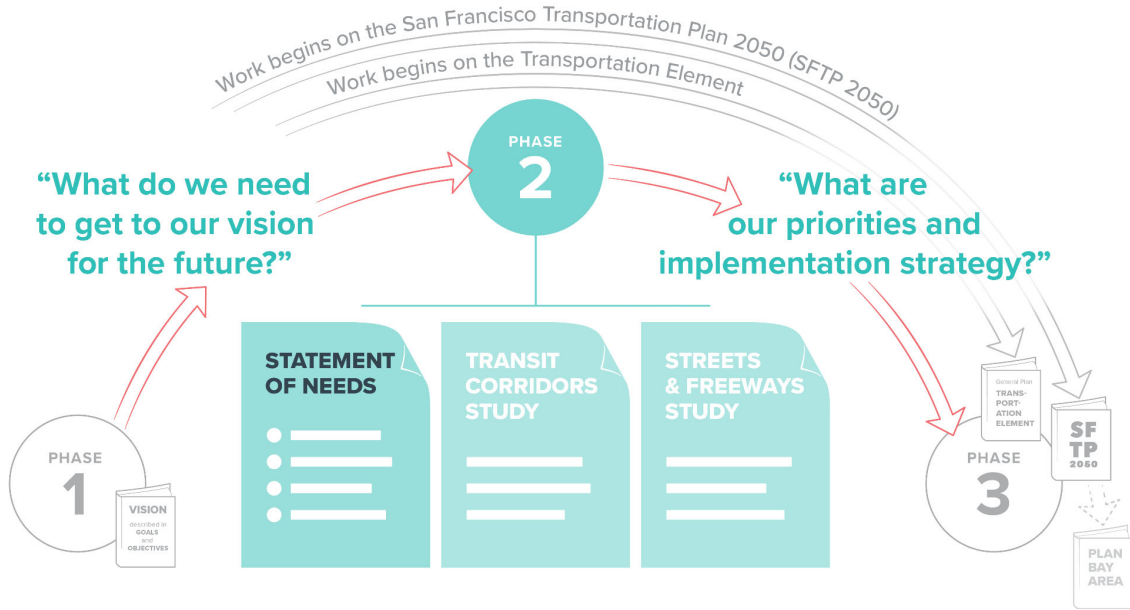
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**We'd like to pause here to respond to some of your questions.**

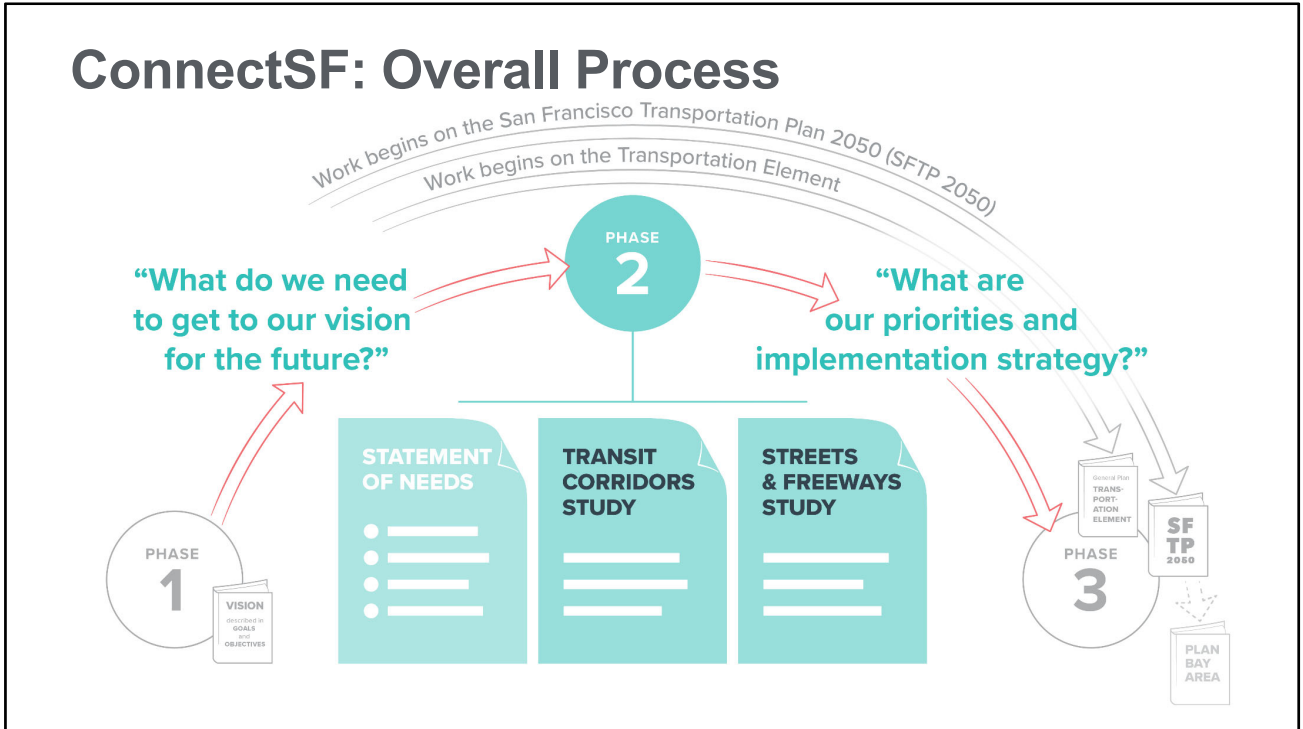
**... Ok thanks for those questions. We'd like to continue our presentation now.**

# ConnectSF: Overall Process



**This analysis tells us our existing transportation system provides a high degree of access and sustainability, and we need to make more investments to meet the aggressive goals we’ve set for ourselves as a City.**

# ConnectSF: Overall Process

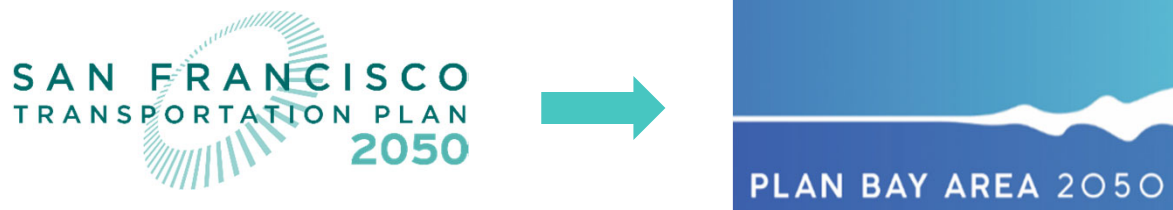


## How do we achieve this?

In Phase 2, the Transit Corridors Study and Streets and Freeways Study, with your help, will identify major project concepts for new investments and policies that will seek to address the challenges we described today.



## Regional Coordination



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**ConnectSF through the SFTP will identify San Francisco’s local priorities in Plan Bay Area.**

**It is important for these priorities to be included in the regional plan to ensure eligibility for state and federal funding.**

**Additionally, our goals, objectives, policies, and priorities will be included in a new Transportation Element for San Francisco.**

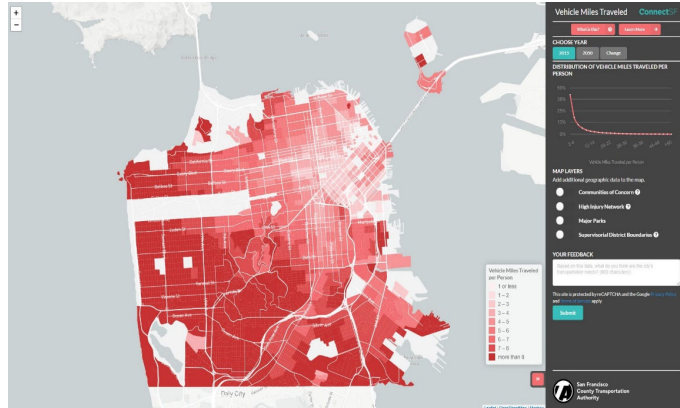
**The Transportation Element will guide the work of groups that deal directly and indirectly with the City’s streets; local and regional transportation; or land developments.**

**Any Questions?**

**I'll pause here if anyone has questions about the Overall Process we just described.**

# Opportunities for Engagement

1. Interactive maps:  
<https://connectsf.org/transportation-needs/>
2. In-person outreach in summer/fall 2019
3. Request a presentation at [connectsf@sfgov.org](mailto:connectsf@sfgov.org)



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We want to be sure you are aware of interactive maps we developed related to the following metrics:

- Jobs and housing growth
- Jobs accessibility
- Commute times
- Transit crowding
- Personal miles driven
- Trip-making patterns

These maps can be found on the ConnectSF website at the following address:  
[connectsf.org/transportation-needs](https://connectsf.org/transportation-needs)

You can also find the maps by going to [Connectsf.org](https://connectsf.org) and clicking on the “What’s Happening Now” icon on the homepage.

These maps give you a baseline understanding of how San Francisco’s transportation system is performing today and in the future.

The analysis informs us of where we need to focus our investments.

Within each map, there is an area where you can provide feedback.

Through the spring and summer 2019 we will be conducting outreach on the Statement of Needs.

Then in the Fall we will have workshops on the Transit Corridors Study and Streets and Freeways Study.

We are also offering to provide presentations to the groups we engaged previously and welcome suggestions for other groups we should reach out to.

#### **Maps Intro - Personal Miles Driven**

This map shows the average personal miles driven in 2015 and 2050 by home location. These estimates are summarized in Travel Analysis Zones (T.A.Z.s), which are spatial units that equate to several city blocks used in travel modeling and analysis.

The lighter colors show less miles of driving.

The darker colors show more miles of driving.

Here's what we see in 2015:

People in the western and southern parts, in particular are driving more than people in other parts of the city.

When we look at the map for change between 2015 and 2050, we can see lots of TAZs in the western part of the city that have less driving - the light teal and teal.

However, in some of our more walkable neighborhoods - Downtown, SoMa and parts of North Beach and Chinatown - we see that more people are driving more miles.

There are additional map layers you can look at, including Communities of Concern, the High Injury Network, Major Parks and Supervisorial District Boundaries.

We invite you to play around with these buttons and other parts of this map.

[OPTIONAL PAUSE FOR QUESTIONS]

Thanks again for those questions (if applicable).

Remember that this is just one map of one metric. We encourage to take a look at the other maps:

- Jobs and housing growth
- Jobs accessibility
- Commute times
- Transit crowding
- Trip-making patterns





That brings us to the end of the webinar.

On behalf of my ConnectSF partners and myself, Thank you for taking the time to join us today.

And thank you for your questions.

We hope you found this webinar informative.

Shortly we will be posting a recording of this webinar and slide presentation at the ConnectSF website: [connectsf.org](http://connectsf.org).

We are going to sign off now - but remember you can always reach out to the ConnectSF team at [connectsf@sfgov.org](mailto:connectsf@sfgov.org).

Goodbye, everyone.