

Executive Summary

Perhaps no place was as visibly impacted by the COVID-19 pandemic than downtown San Francisco. Downtown office attendance dropped to less than 20% and businesses shuttered as resident, commuter, and visitor trips dropped precipitously. Transit ridership plummeted, resulting in a fiscal crisis for transit agencies, while roadway speeds increased, potentially contributing to higher levels of collisions, deaths, and injuries. Today, workers and visitors are returning to downtown, and while transit ridership is rising steadily and traffic increases are largely concentrated on regional freeways, overall trip-making remains below pre-pandemic levels. This report reveals the major travel trends and insights of the post-pandemic era to date, providing quantitative information on changes, as measured through household travel surveys, the U.S. Census Bureau, and other economic and traffic data.

Key findings in the areas of travel behavior, transportation system performance, population, and economy of both Downtown San Francisco as well as the city and county overall include:

This report reveals the major travel trends and insights of the post-pandemic era to date

DOWNTOWN TRAVEL TRENDS¹

Change in typical weekday trips to/from Downtown by geography

TO/FROM/WITHIN	% DIFFERENCE
Downtown Core	-46%
Rest of San Francisco (SF)	-25%
Rest of Bay Area	-25%

Source: travel diary survey

69% of the drop in Downtown trips is due to a decline in non-work purposes such as shopping, eating out, and personal business, though the number of work trips had the largest percentage decrease (-66%).

Half the decline in the number of Downtown trips was due to a drop in trips within in Downtown. The other half of the decline in the number of Downtown trips was evenly split between local (to/from the rest of San Francisco) and regional (to/from the rest of the Bay Area) trips.

Downtown San Francisco, as defined in this report

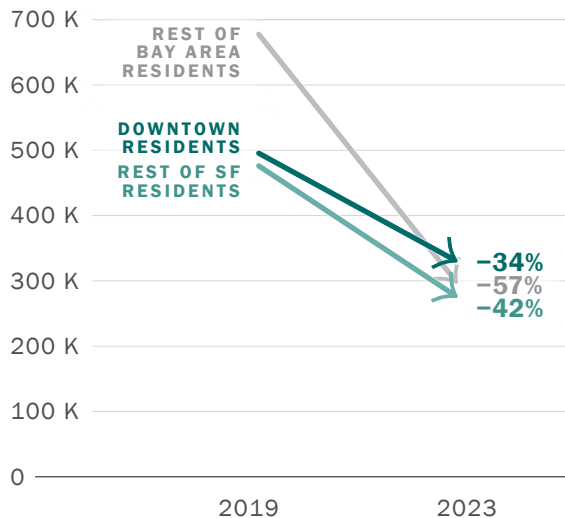


¹ Changes to travel behavior are revealed by data from household travel diary surveys of Bay Area residents jointly administered by the Transportation Authority, the Metropolitan Transportation Commission (MTC), and the Santa Clara Valley Transportation Authority.

DOWNTOWN TRAVEL TRENDS (continued)

51% of the decline in Downtown trips is due to fewer trips being made by residents of other Bay Area counties.

Typical adult weekday trips to/from/within Downtown by home location, 2019 - 2023

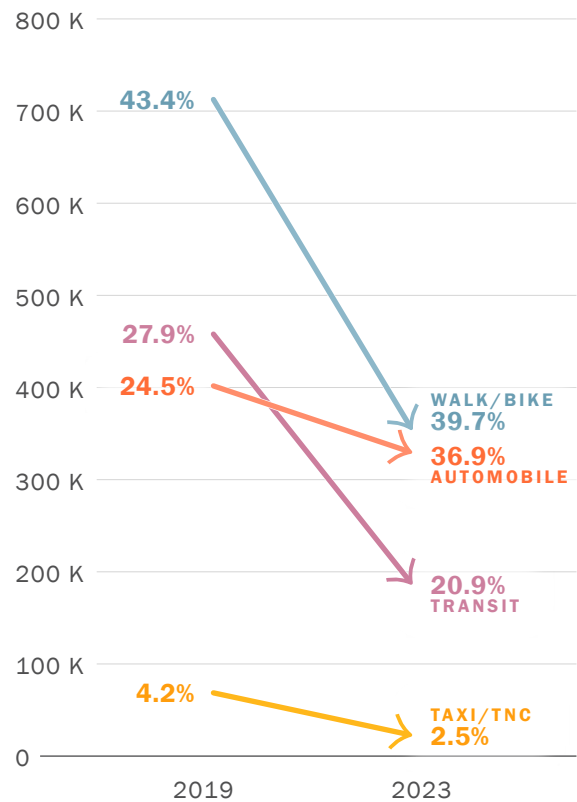


Source: travel diary survey

Demographically, trips by middle income travelers (household income \$100k - \$200k) declined by 56%, while trips by high income and low income travelers declined by 42% and 40%, respectively; and trips by White and Asian/Pacific adults declined much more than Hispanic/Latinx, Black, or other races/ethnicities.

Downtown automobile mode share increased from 24% to 37% (across all trip purposes) while the walk/bike and transit mode shares decreased. Walk/bike remained the top share of Downtown trips, though by a smaller margin.

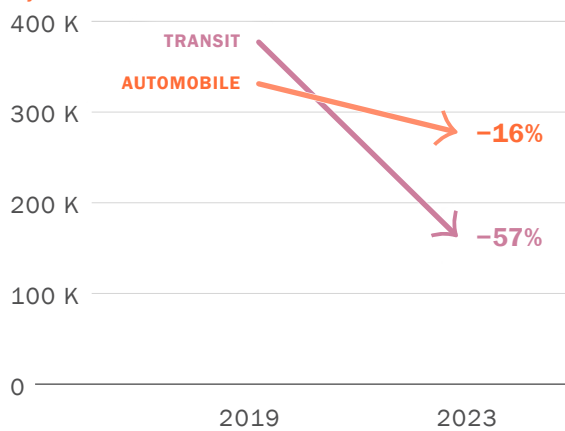
Typical adult weekday trips to/from/within Downtown by mode, 2019 - 2023



Source: travel diary survey

Driving has become the dominant mode of transportation for travel between Downtown and the rest of San Francisco / Bay Area.

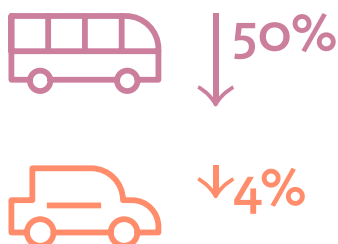
Typical adult weekday trips into / out of Downtown by mode, 2019 - 2023



Source: Travel diary survey

DOWNTOWN TRAVEL TRENDS (continued)

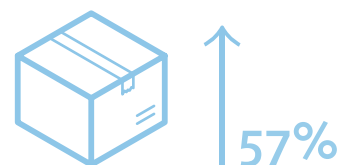
Transit trips between Downtown and the rest of San Francisco declined by more than 50% between 2019 and 2023, while drive trips between Downtown and the rest of San Francisco declined only 4%.



Telecommuting rates of San Francisco residents have been dropping to 24% in 2023, but remain significantly elevated compared with pre-pandemic rates (7% in 2019) and higher than residents of the rest of the Bay Area.



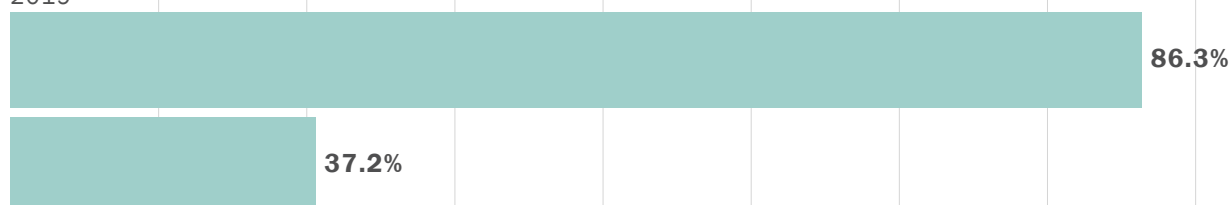
Use of delivery services e.g., for packages, groceries, or food increased significantly, with the share of Downtown San Francisco residents receiving deliveries per typical weekday increasing from 26% to 40%.



The share of Downtown workers telecommuting two or more days per week increased from 14% to 63% between 2019 and 2023.

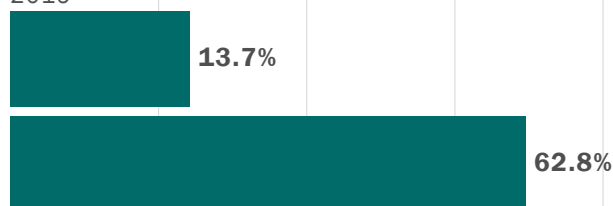
Telecommute frequency for Downtown workers, 2019 - 2023

FEWER THAN 2 DAYS PER WEEK
2019



2023

2 OR MORE DAYS PER WEEK
2019



2023

50 K

100 K

150 K

200 K

250 K

300 K

350 K

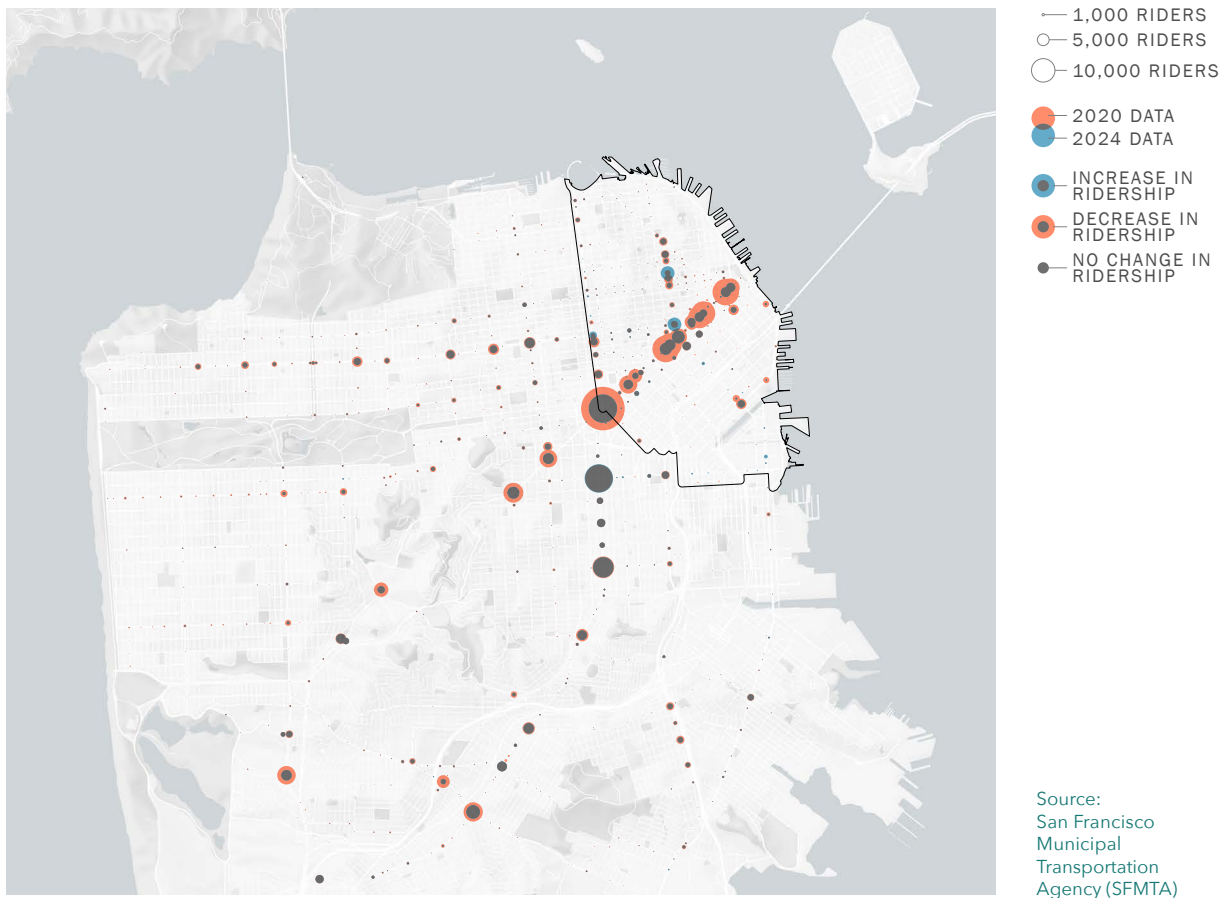
400 K

Source: travel diary survey

TRANSPORTATION SYSTEM PERFORMANCE

Muni continues to have the highest ridership of all Bay Area transit operators, and has recovered to over 70% of 2019 weekday ridership by 2024. **Muni ridership has been resilient in neighborhoods such as Mission, Bayview, and Mission Bay, and on corridors such as Mission, Van Ness, Stockton, and 16th Street where transit investments were made.**

Weekday Muni ridership by intersection for February 2020 and February 2024



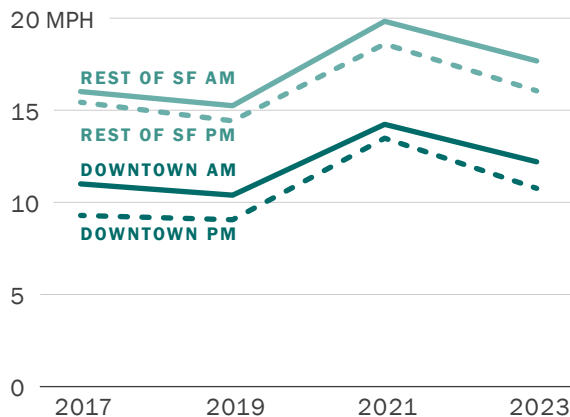
BART ridership continues to recover, though still remaining well below pre-pandemic levels. **BART ridership recovery is more robust on weekends than weekdays and outside the Downtown core of San Francisco than within.** Downtown stations ridership recovered to 36% of 2019 ridership by 2024 for weekdays and 54% for weekends.

Caltrain ridership recovered to approximately half of pre-pandemic ridership by March 2025. **The Caltrain Electrification project continues to boost ridership**, contributing to a 37% year-on-year increase in ridership in the first seven months of service.

TRANSPORTATION SYSTEM PERFORMANCE (continued)

Roadway congestion on surface arterials in Downtown remains below pre-pandemic levels, as indicated by higher average speeds.

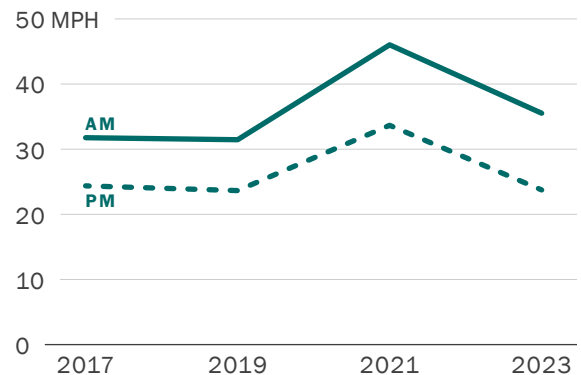
Weekday peak automobile speeds on CMP network surface arterials in Downtown and the rest of San Francisco, 2017 - 2023



Source: INRIX and Transportation Authority, also cf. 2023 CMP report

Average congestion on freeways in San Francisco has returned to pre-pandemic levels in the PM peak, despite office attendance at 40% to 45% of pre-pandemic levels (reported below).

Weekday peak automobile speeds on CMP network freeways, 2017 - 2023

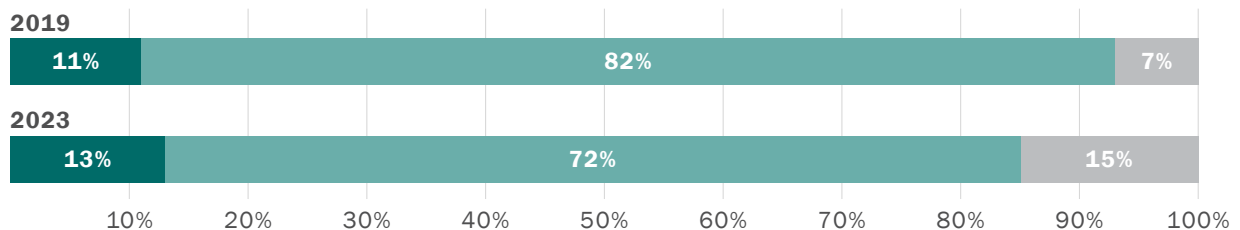


Source: INRIX and Transportation Authority, also cf. 2023 CMP report

Congestion on the I-80 freeway in Downtown reflects an **increased share in through trips (between East Bay and the Peninsula / South Bay)**, and a decreased share in people driving into San Francisco.

Share of Downtown I-80 automobile trips by origin/destination

INTRA-SF TO/FROM SF NON-SF (PASS THROUGH)



Source: travel diary survey

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.

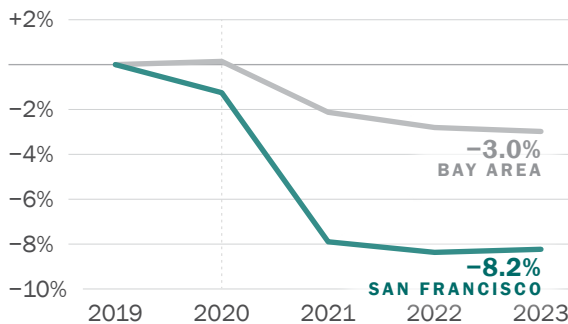
San Francisco-Oakland Bay Bridge (Bay Bridge) and Golden Gate Bridge volumes are 9% and 16% lower, respectively, than pre-pandemic, but **volumes at the San Mateo County screenline have returned to 2019 levels.**

Many of these transportation trends can be further contextualized by San Francisco's population and employment changes, transit service level adjustments, and work from home patterns in the post-pandemic era:

POPULATION & DEMOGRAPHICS

San Francisco's population is 8% lower in 2023 than in 2019; the Bay Area declined 3%.

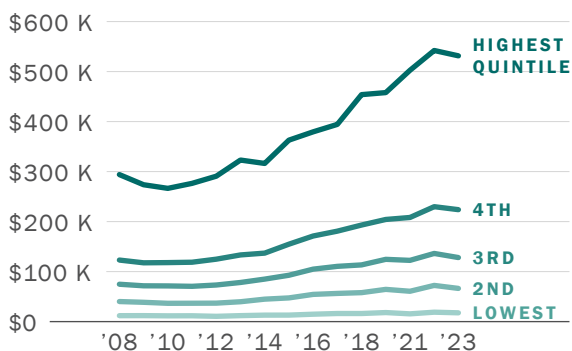
Percentage change in population in San Francisco and the Bay Area, 2019 - 2023



Source: U.S. Census Bureau, Population Division. Annual Estimates of the Resident Population for Counties in California. Data is from July 1 of each year.

The household income gap between higher income households and lower income households has widened, and the income of San Francisco's lowest household income quintile declined 3% between 2019 and 2023.

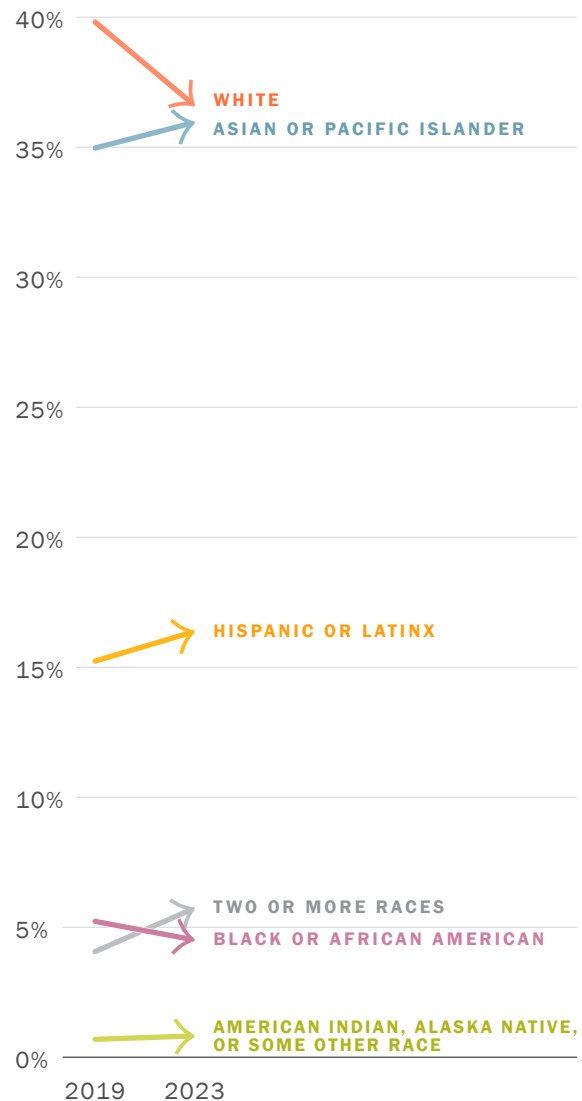
Mean household income in each quintile for San Francisco



Source: U.S. Census Bureau, ACS 1-Year Estimates Detailed Tables, Table B19081, 2008 - 2023

San Francisco's population is becoming more racially and ethnically diverse.

San Francisco resident race/ethnicity shares, 2019 - 2023

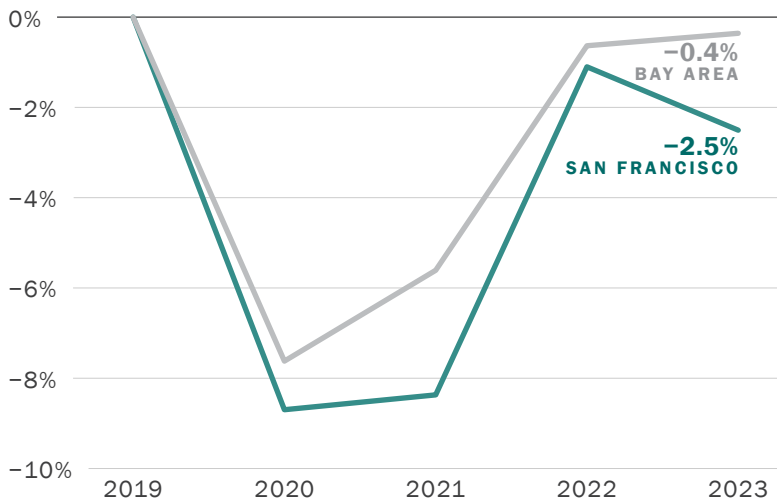


Source: U.S. Census Bureau. Hispanic or Latino Origin by Race. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table C03002, 2019 and 2023.

ECONOMY & EMPLOYMENT

Employment in San Francisco is 2.5% lower in 2023 than in 2019 while the Bay Area is virtually unchanged.

Percentage change in total employment by workplace in San Francisco and the Bay Area, 2019 - 2023



Source: California Employment Development Department, Current Employment Statistics.

Office rental market vacancy is slowly reducing but remains at just below 37% at the end of 2024.

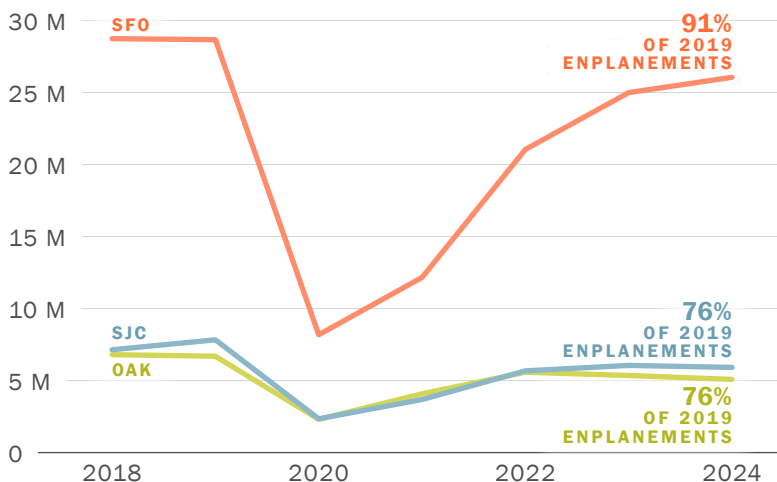


Office attendance has stabilized at 40% to 45% of 2019 attendance levels, as of the end of 2024.



Airport enplanements at SFO have returned to 91% of pre-pandemic levels, which is a stronger recovery than has occurred at OAK or SJC (both 76%).

Airport enplanements at SFO, OAK, and SJC, 2018 - 2024



Source: San Francisco International Airport, Oakland Airport, and San José Mineta International Airport.

Hotel and short term rental occupancy rates are recovering, but remain well below pre-COVID levels at 60% to 65%.



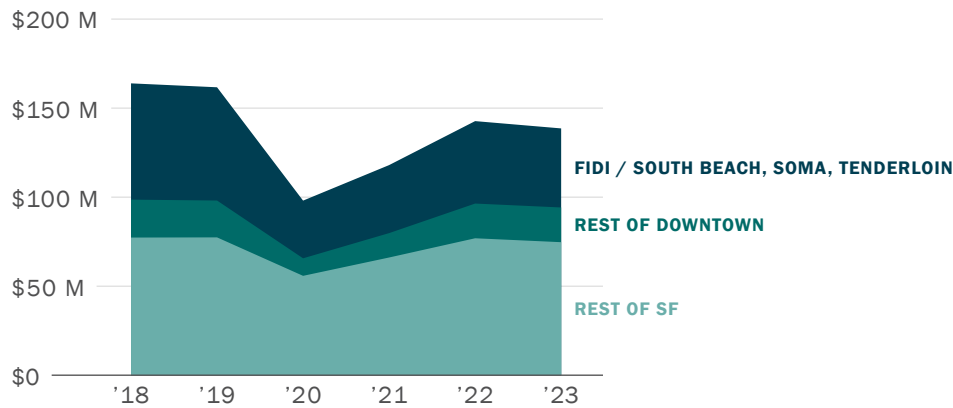
Employment in the leisure and hospitality industries is increasing, but remains below pre-pandemic levels.



ECONOMY & EMPLOYMENT (continued)

The drop in annual sales tax revenue in **Financial District / South Beach, South of Market, and the Tenderloin neighborhoods** accounts for 83% of the lower sales tax revenue in San Francisco overall between 2019 and 2023.

San Francisco sales tax revenue by geography, 2018 - 2023



Source: HdL Companies, via San Francisco Economic Recovery Dashboards.

While the COVID-19 pandemic has been profoundly disruptive, it also provides San Francisco the opportunity to facilitate a healthy recovery: reconceiving Downtown, building a more resilient economy, and ensuring that these benefits are shared by all. This will rely on stabilizing and growing local and regional transit, and also monitoring and managing private vehicle demand and congestion. In the transportation sector, this effort will be guided by San Francisco's long-standing Transit First policy and the goals of the countywide San Francisco Transportation Plan: promoting equitable access, ensuring safety and livability, and supporting a healthy environment and economic vitality, through effective program delivery and engagement across the city.