

# Downtown Travel Study



San Francisco  
County Transportation  
Authority

Transportation Authority Community Advisory Council – Agenda Item 7  
July 23, 2025

# Key Findings Outline

## Travel trends

- Downtown travel trends mostly from Bay Area Travel Study (2019 & 2023, MTC/SFCTA/VTA)

## Population & economy



# Travel Trends



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Downtown Travel Study

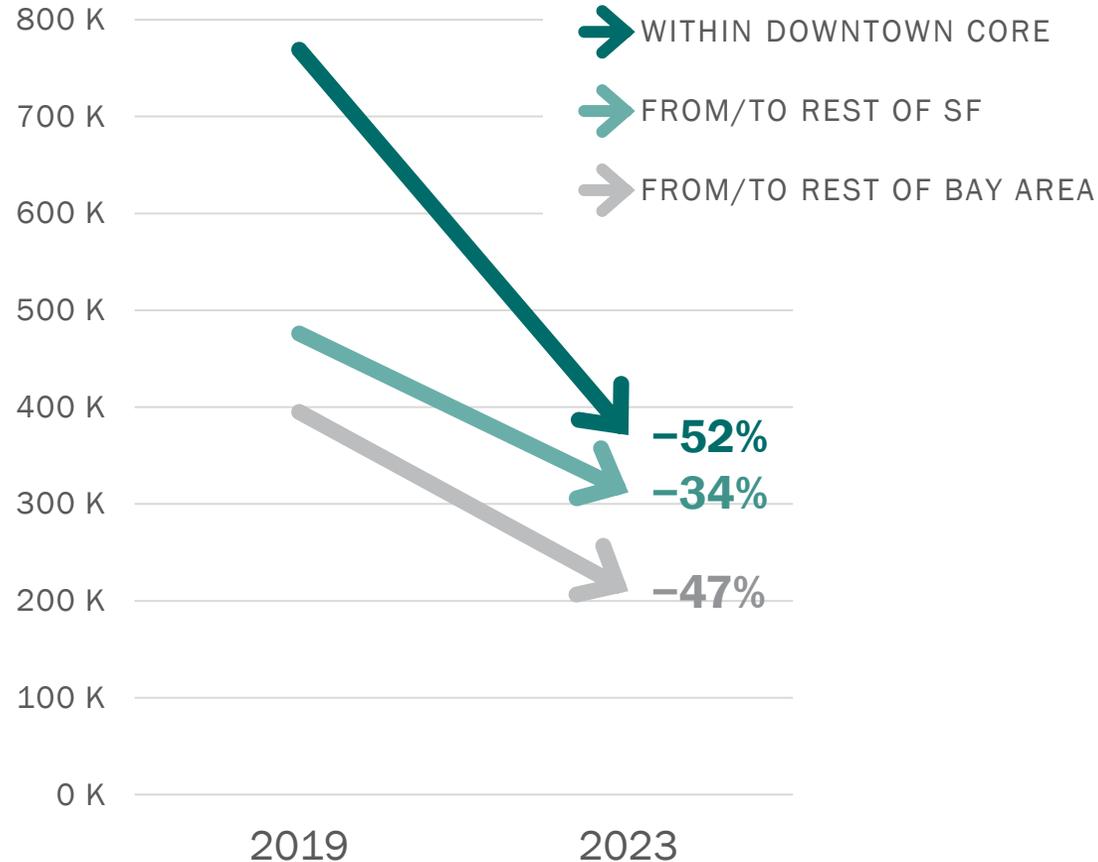
# Change in total trips

## Adult (18+) typical weekday trips

TO/FROM/WITHIN	2019	2023	% DIFFERENCE
DOWNTOWN	1,641,000	893,000	-46%
REST OF SAN FRANCISCO	2,698,000	2,015,000	-25%
REST OF BAY AREA	24,540,000	18,433,000	-25%

# Change in Downtown trips

## Adult (18+) typical weekday trips

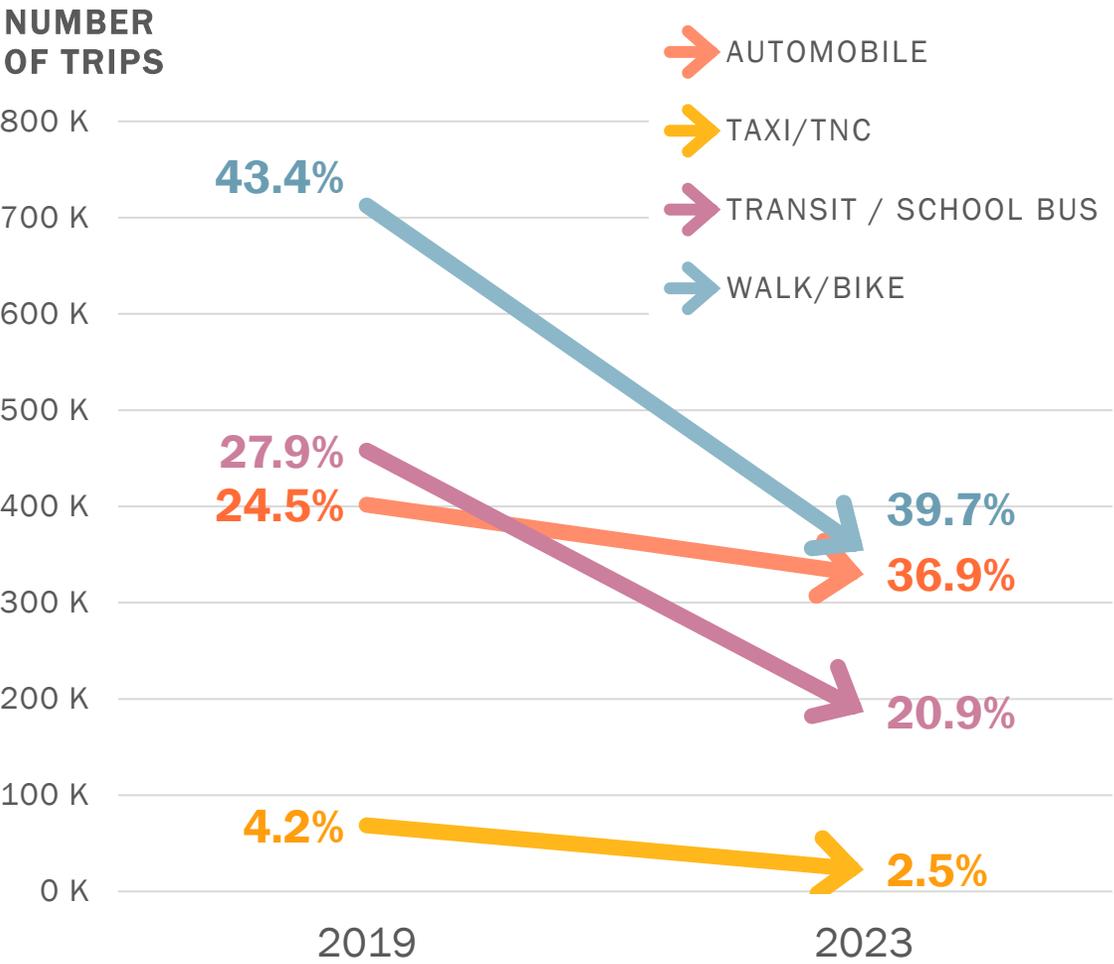


TO/FROM DOWNTOWN	2019	2023	% DIFF
Within Downtown	769,000	371,000	-52%
From/To Rest of SF	476,000	312,000	-34%
From/To Rest of Bay Area	395,000	210,000	-47%
<b>Total</b>	<b>1,640,000</b>	<b>893,000</b>	<b>-46%</b>

# Change in Downtown trips by mode

- Auto mode share increased
- Walk/bike/transit mode share decreased

## Adult (18+) typical weekday trips to/from/within Downtown

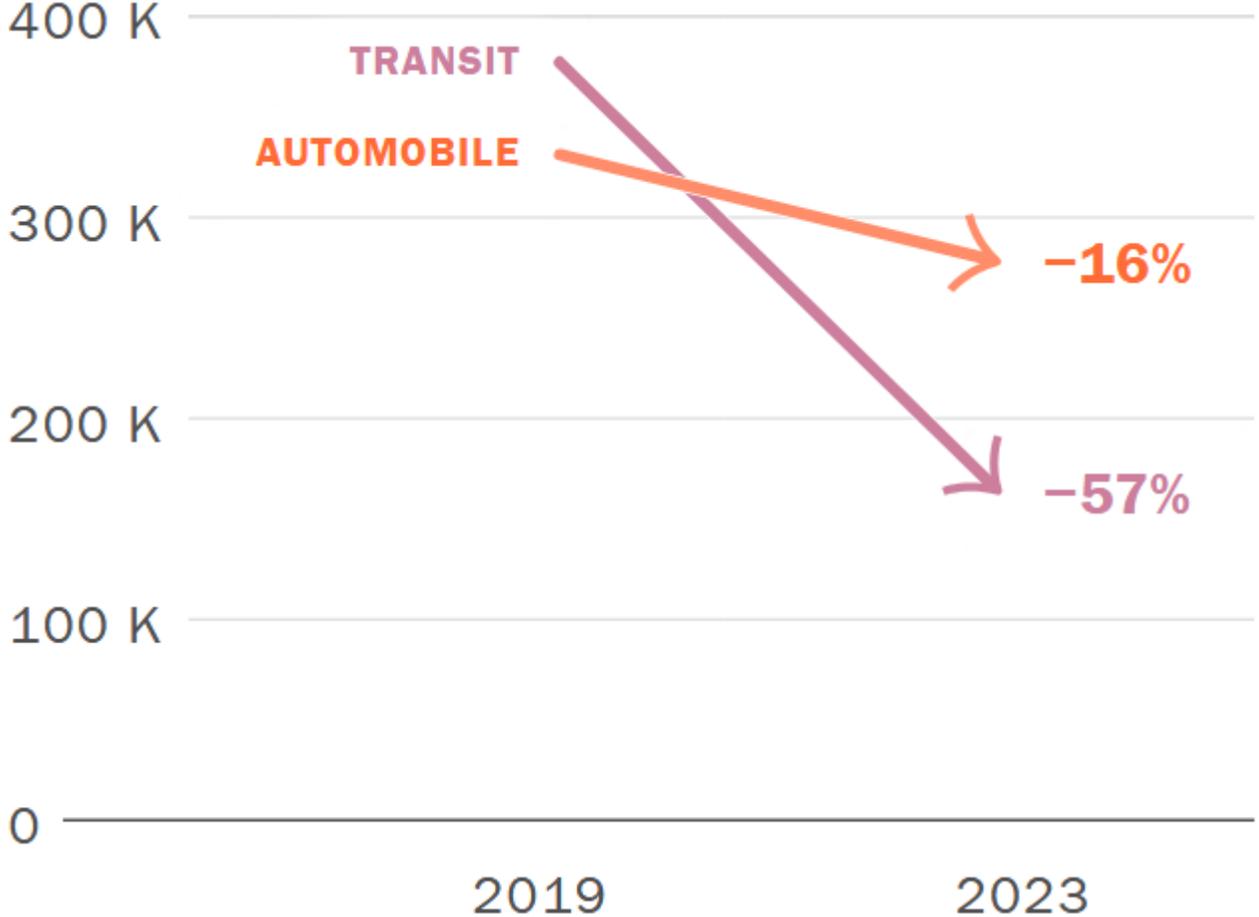


Note: y-axis shows number of trips, arrow tips show shares (%)  
Source: Travel diary survey

# Change in Downtown trips by mode

- Driving now the dominant mode between Downtown and the rest of SF / Bay Area

## Adult (18+) typical weekday trips into / out of Downtown

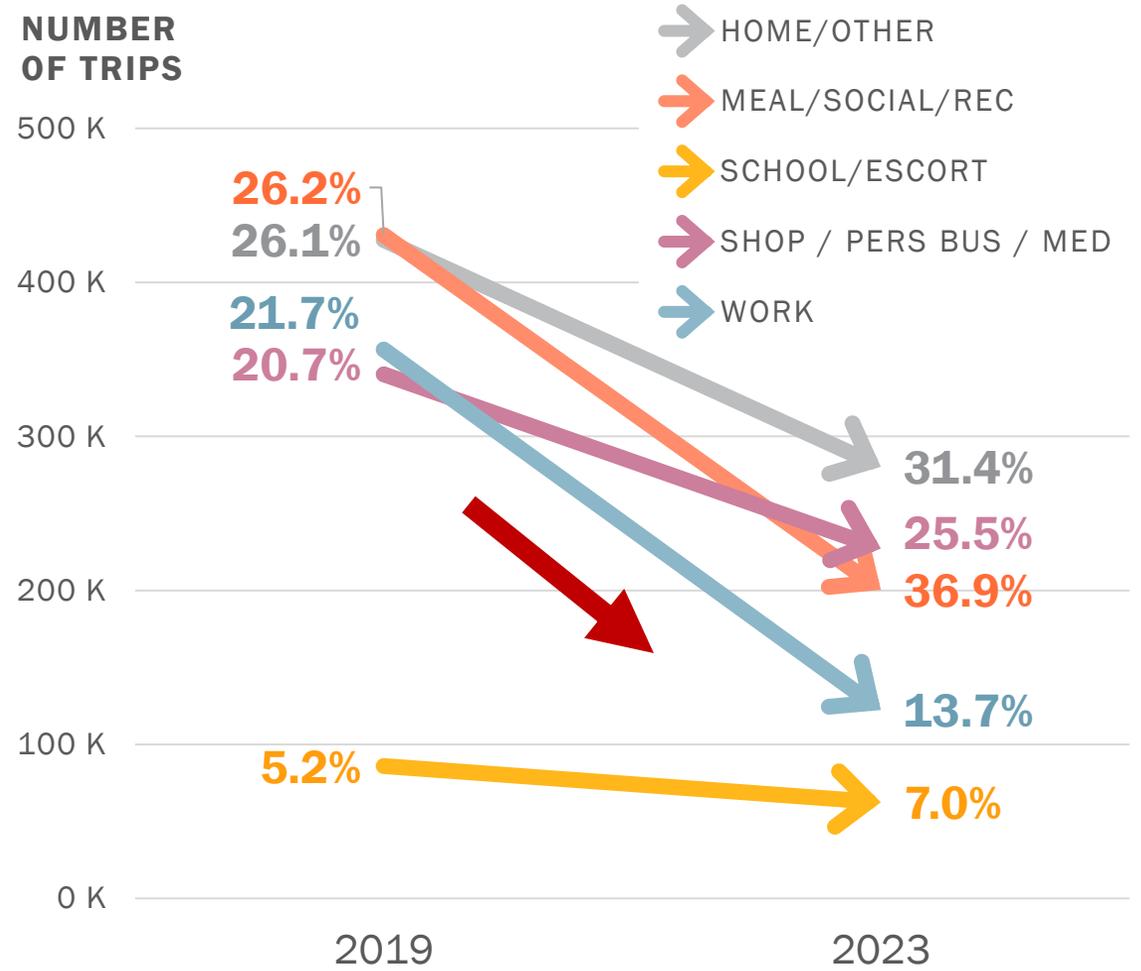


Note: y-axis shows number of trips, arrow tips show shares (%)  
Source: Travel diary survey

# Change in Downtown trip purposes

- 69% of decline in Downtown trips is due to decline in non-work purposes
- The number of work trips had largest percentage decline (-66%)

## Adult (18+) typical weekday trips to/from/within Downtown

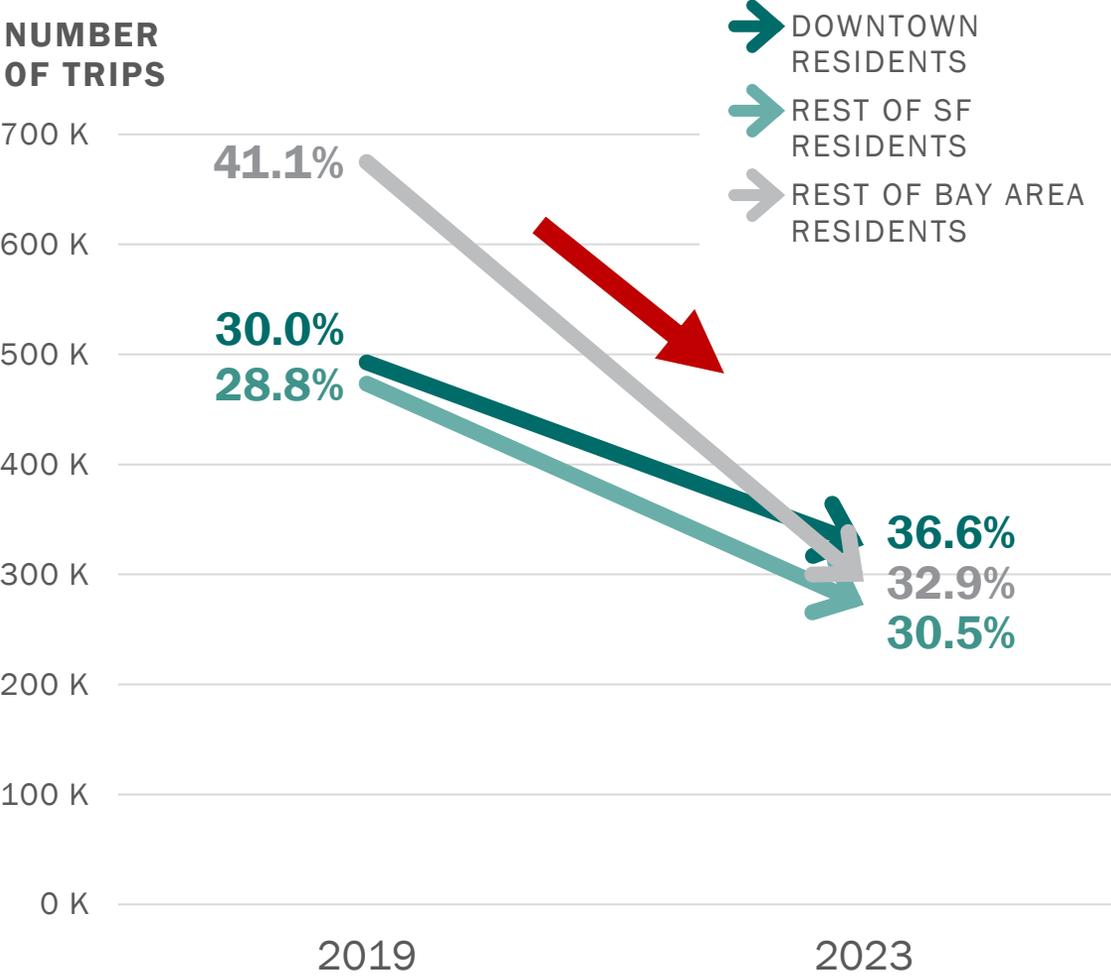


Note: y-axis shows number of trips, arrow tips show shares (%)  
Source: Travel diary survey

# Change in Downtown trips by home geography

- 51% of decline in the number of Downtown trips is due to fewer trips by residents of other Bay Area counties

## Adult (18+) typical weekday trips to/from/within Downtown

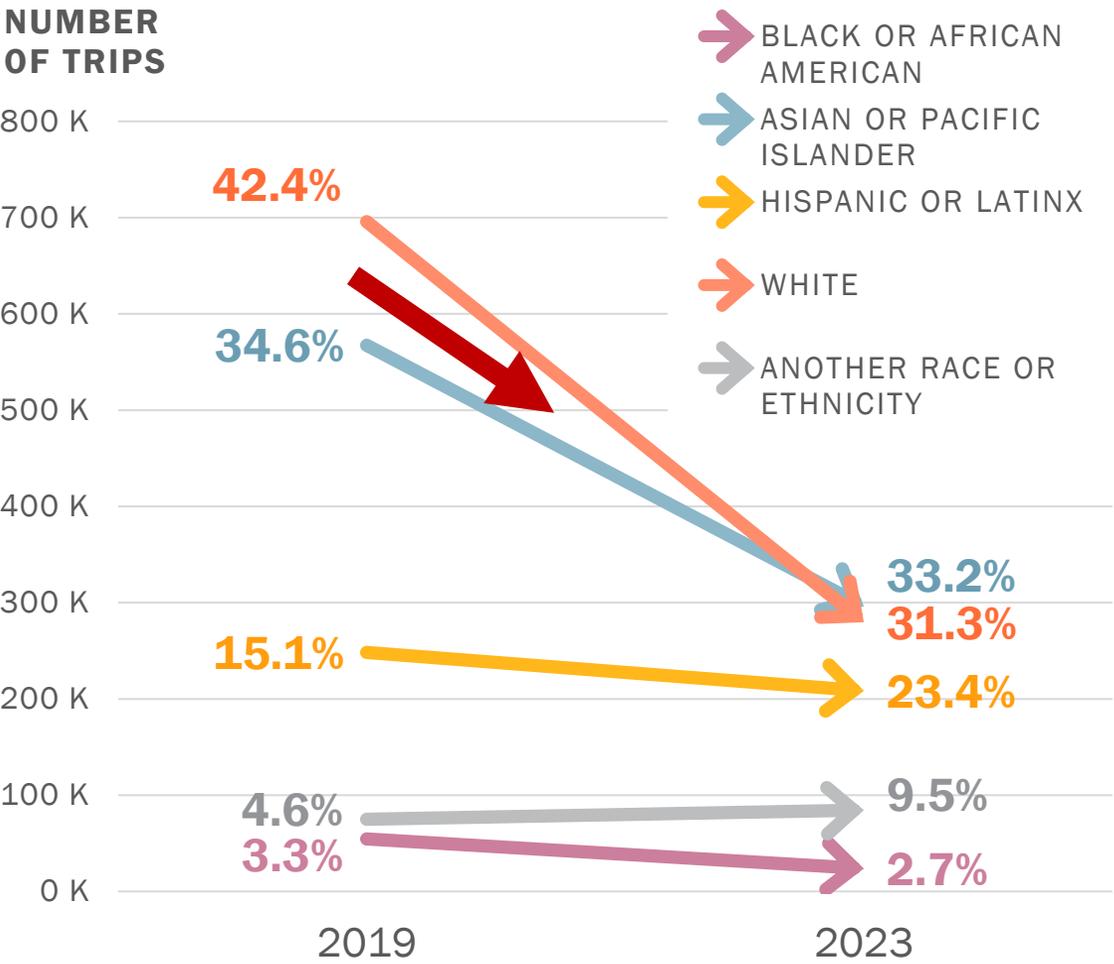


Note: y-axis shows number of trips, arrow tips show shares (%)  
Source: Travel diary survey

# Change in Downtown trips by race/ethnicity

- Trips by White and Asian/Pacific adults declined more than other race/ethnicities

## Adult (18+) typical weekday trips to/from/within Downtown



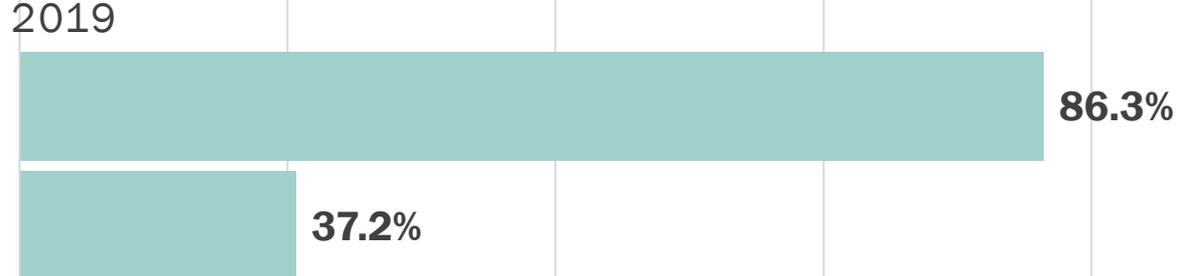
Note: y-axis shows number of trips, arrow tips show shares (%)  
 Source: Travel diary survey

# Change in telecommuting

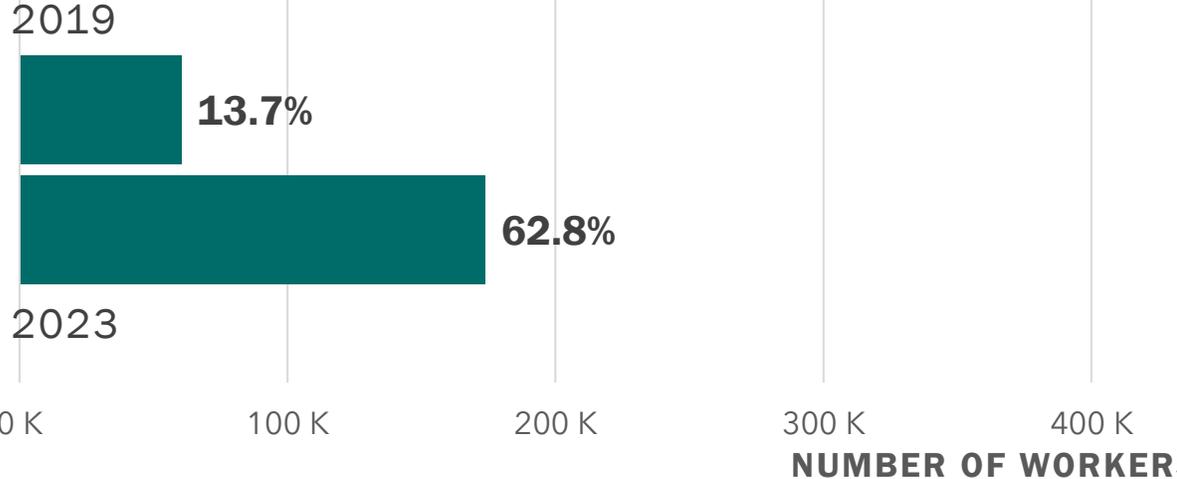
- Share of Downtown workers telecommuting 2+ days/week increased (14% to 63%)
- Telecommuting rates of SF residents are dropping, but still higher than pre-COVID and higher than residents in other Bay Area counties

## Telecommuting by Downtown workers

### FEWER THAN 2 DAYS PER WEEK



### 2 OR MORE DAYS PER WEEK

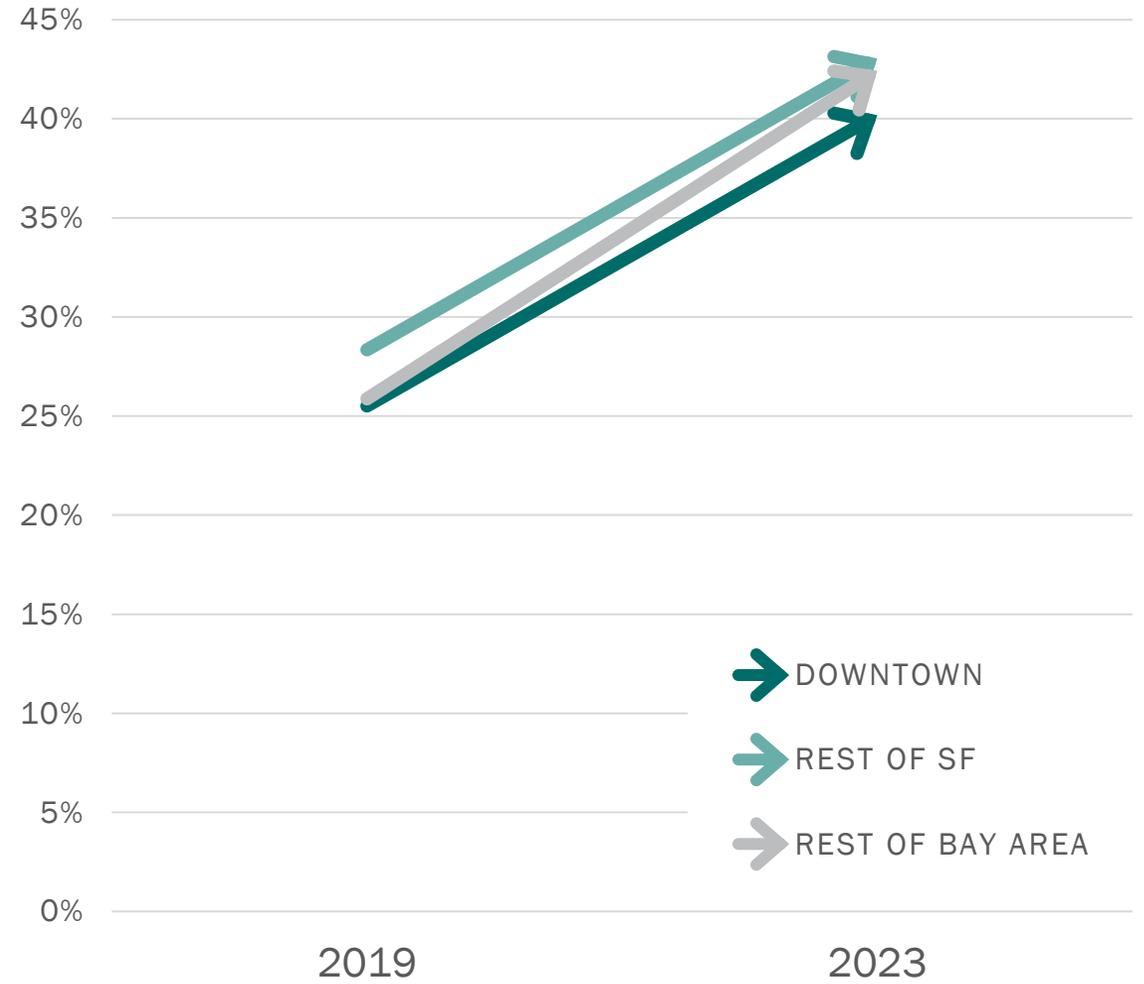


# Change in deliveries

- Share of Downtown residents receiving deliveries on a typical weekday increased from 26% to 40%

## Deliveries by home geography

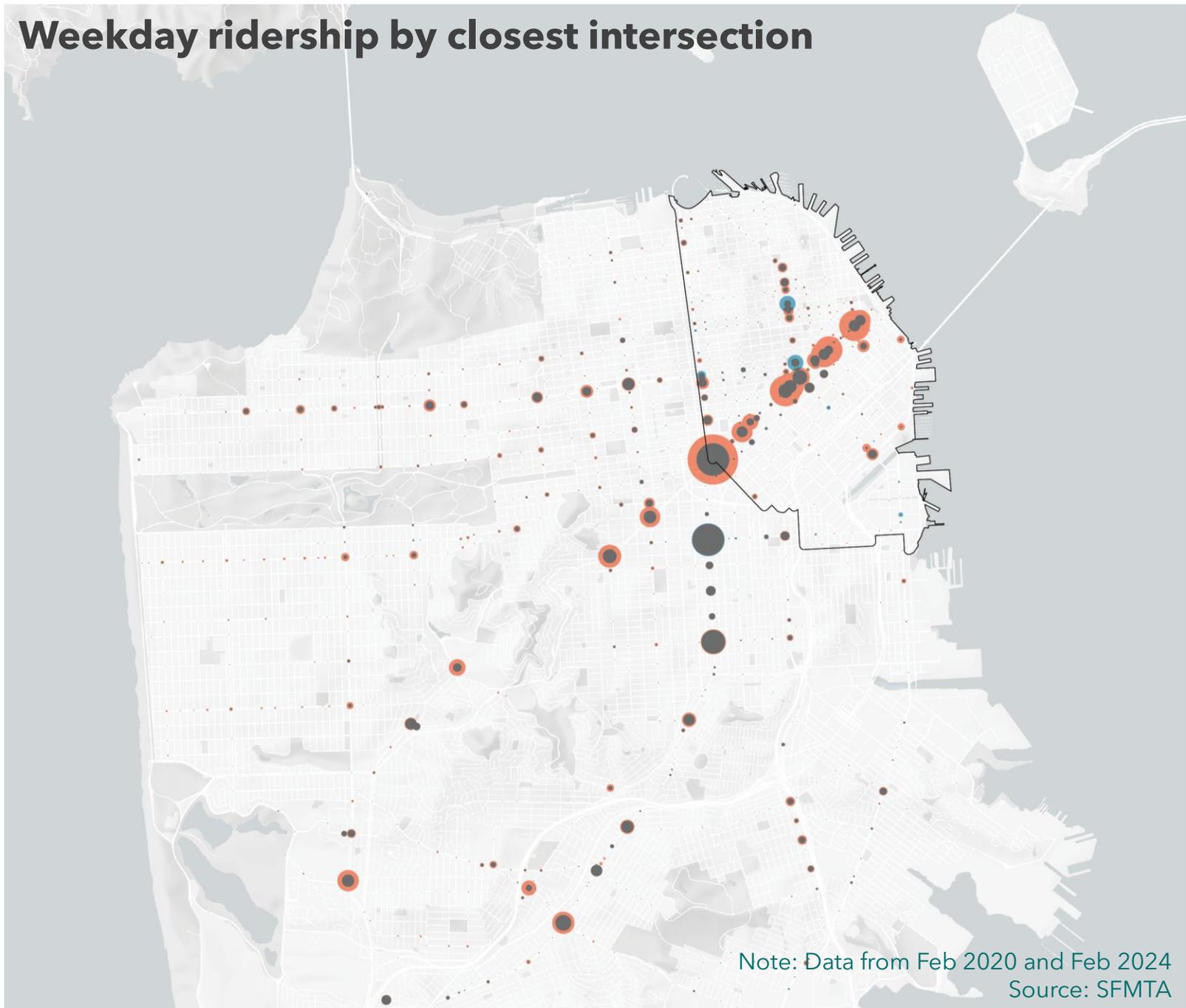
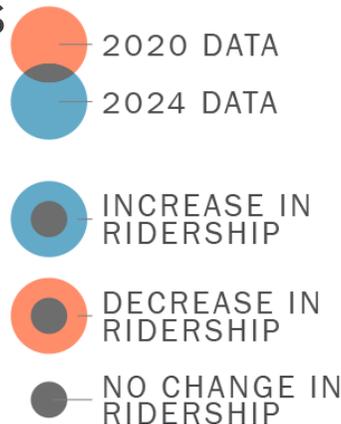
SHARE



Note: y-axis shows number of trips, arrow tips show shares (%)  
Source: Travel diary survey

# Change in Muni ridership

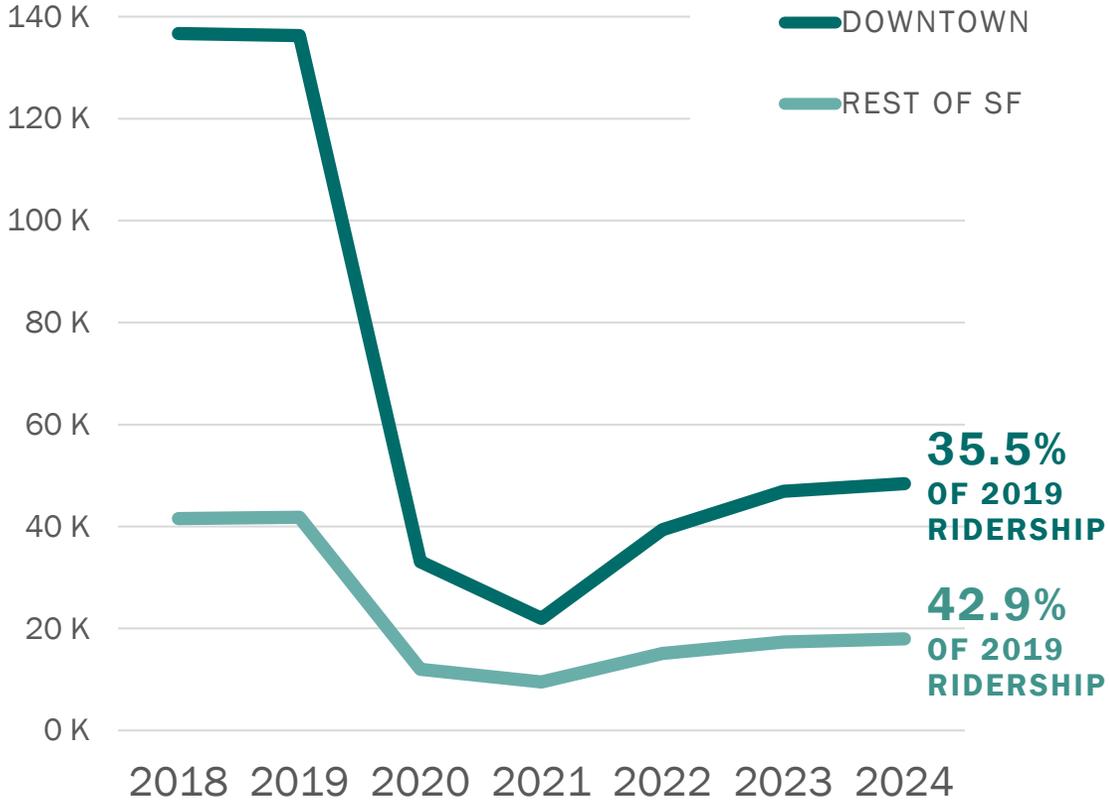
- Highest ridership in Bay Area
- Weekdays: recovered to over 70% of pre-COVID ridership by 2024
- Ridership resilient in some neighborhoods and corridors



# Change in BART & Caltrain ridership

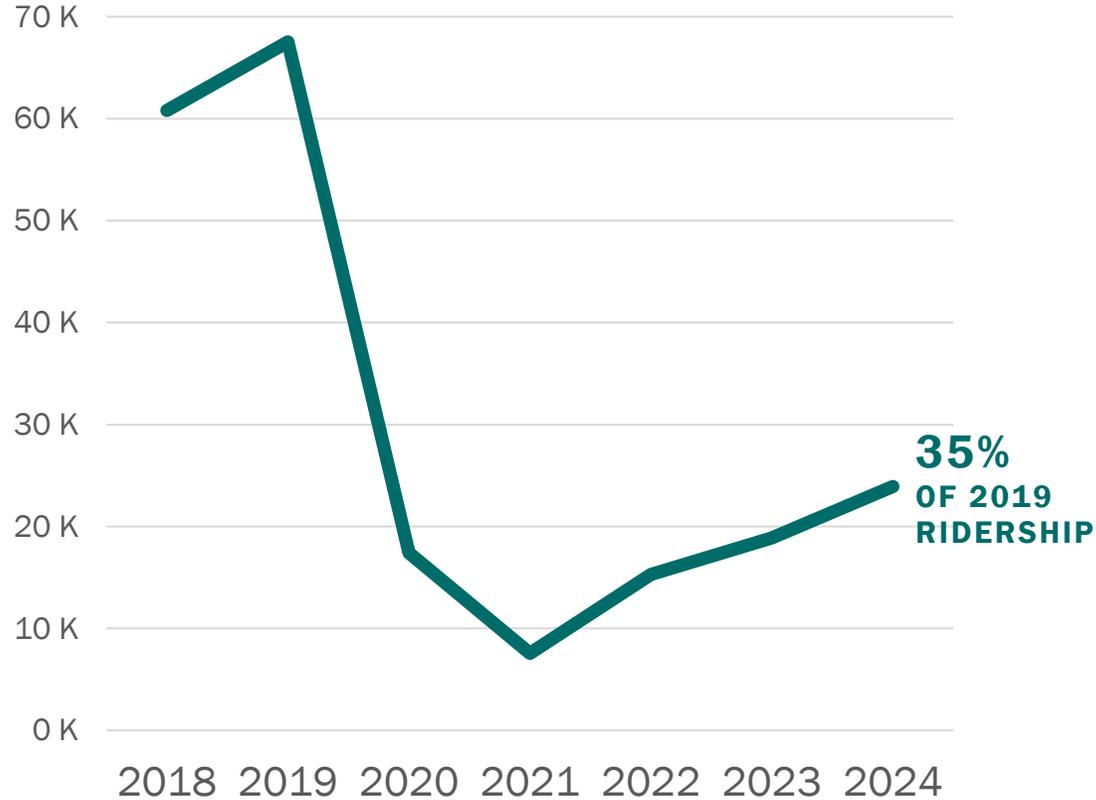
## BART

Average Weekday Ridership



## Caltrain

Average Weekday Ridership

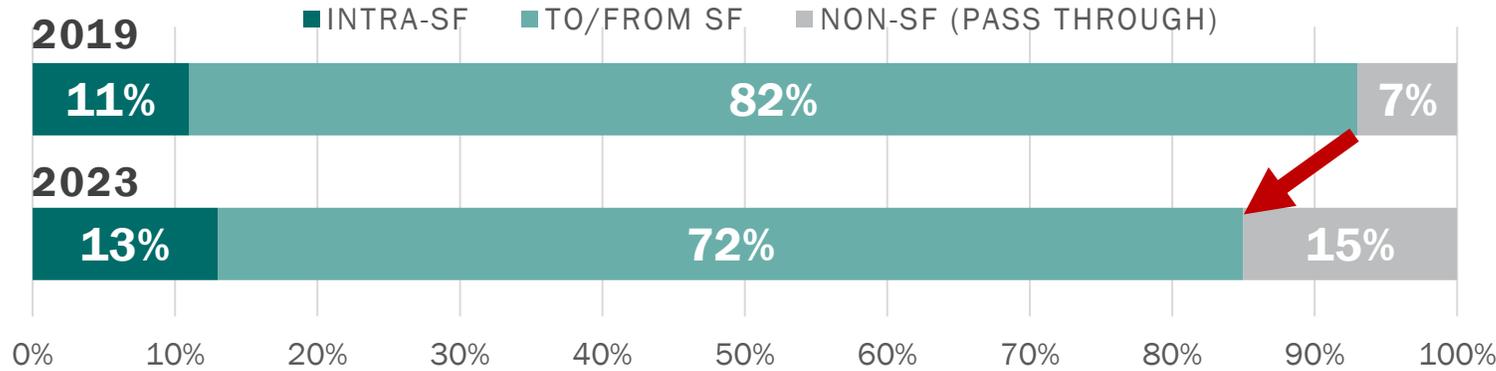


# Change in freeway trips

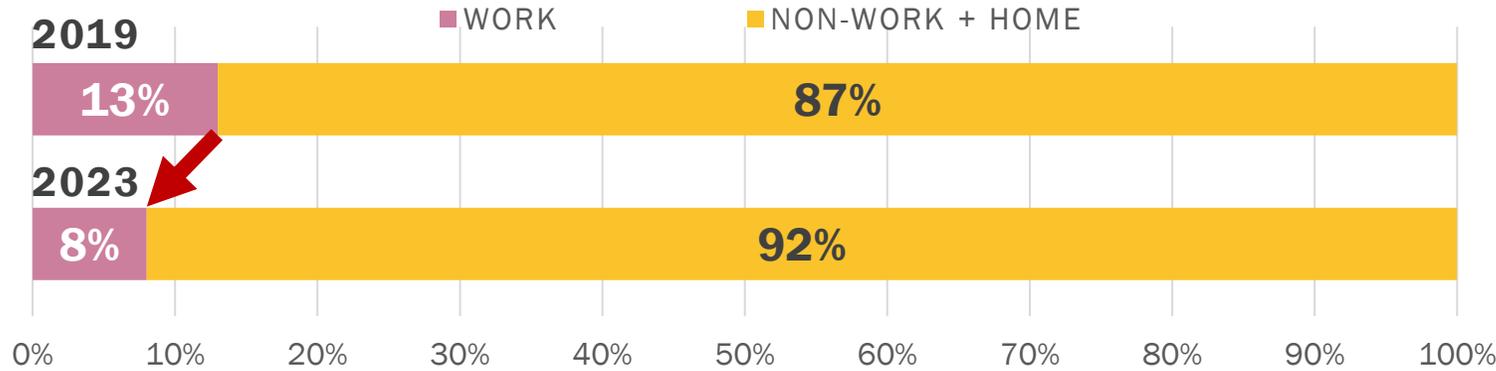
- Increased share of trips passing through SF
- Decreased share of work trips

## Adult (18+) typical weekday auto trips on I-80 (between US-101 and Bay Bridge)

### Trip origin/destination



### Trip purpose



# Population and Economy

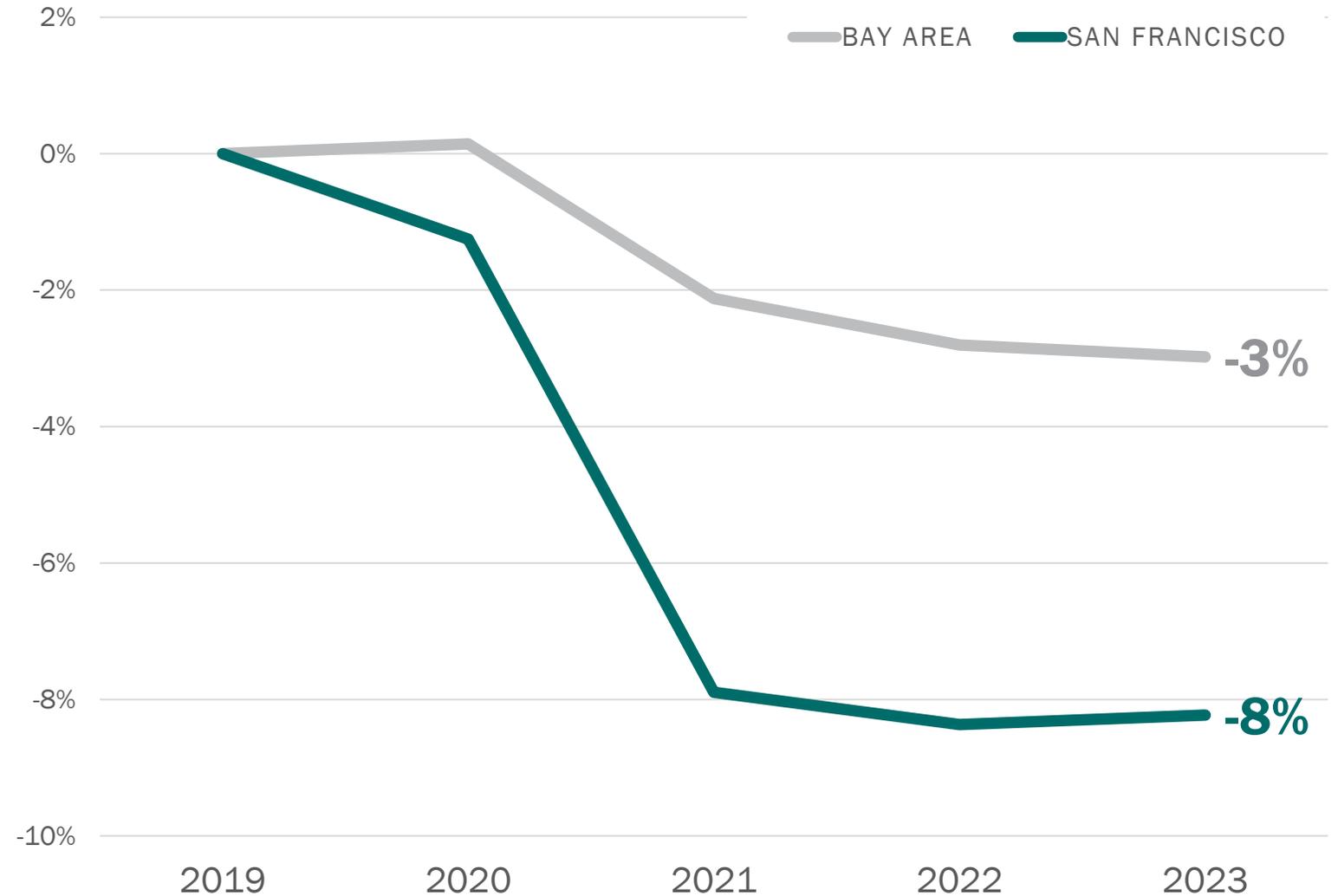


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# Population

## Percent change in population



# Employment

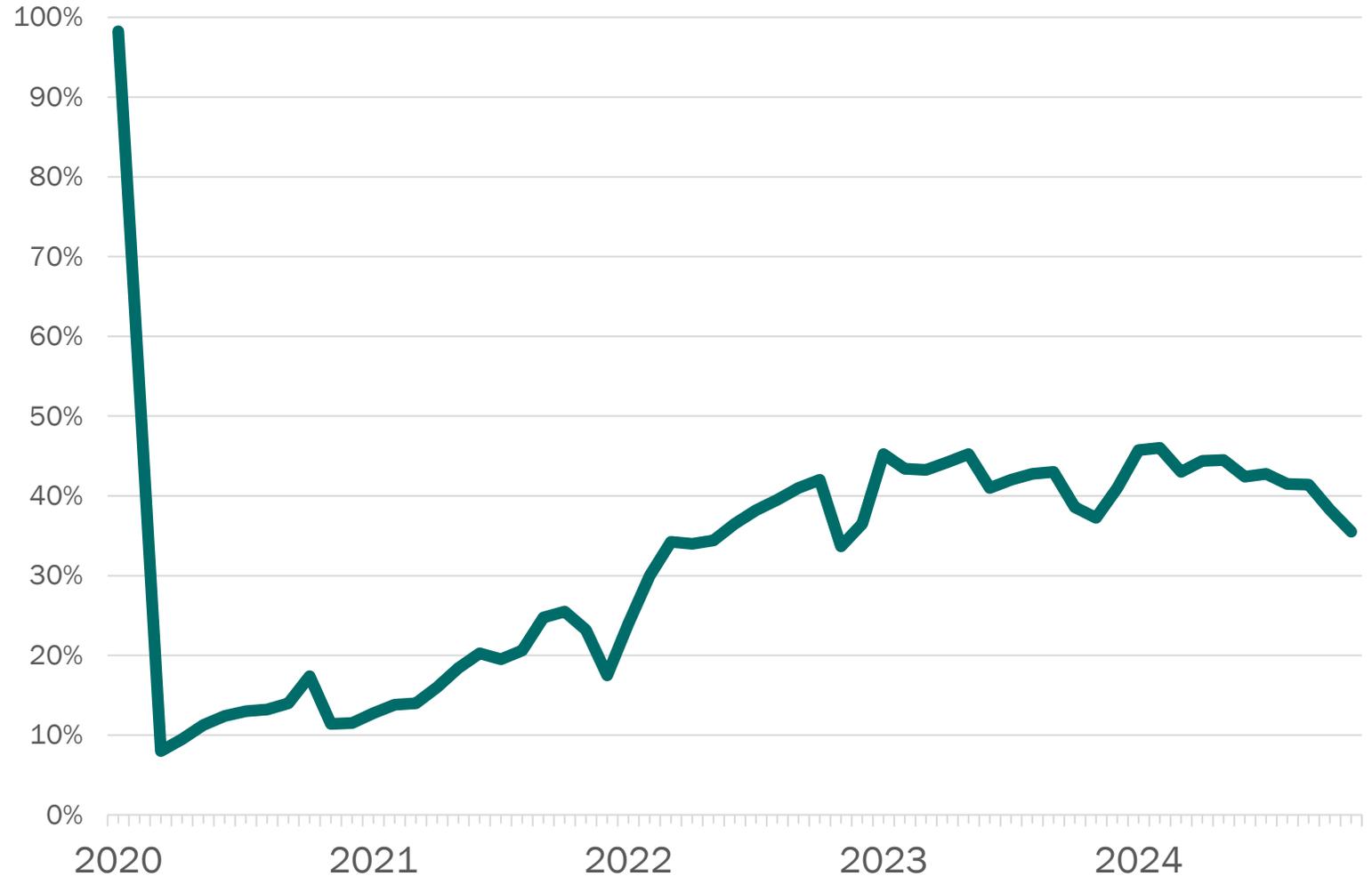
## Percent change in total employment by place-of-work



# Office attendance

- Stabilized at 40-45% of 2019 (end of 2024)
- Recent executive orders required more days in the office by government workers

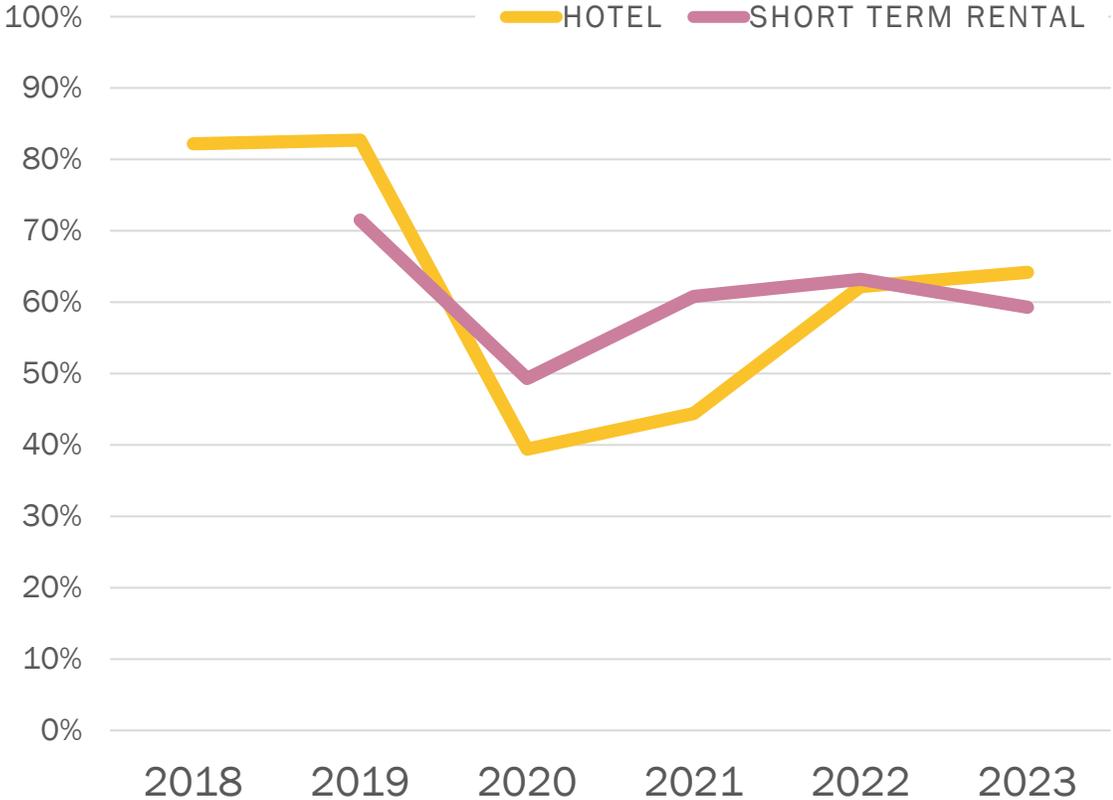
## SF metropolitan area office attendance



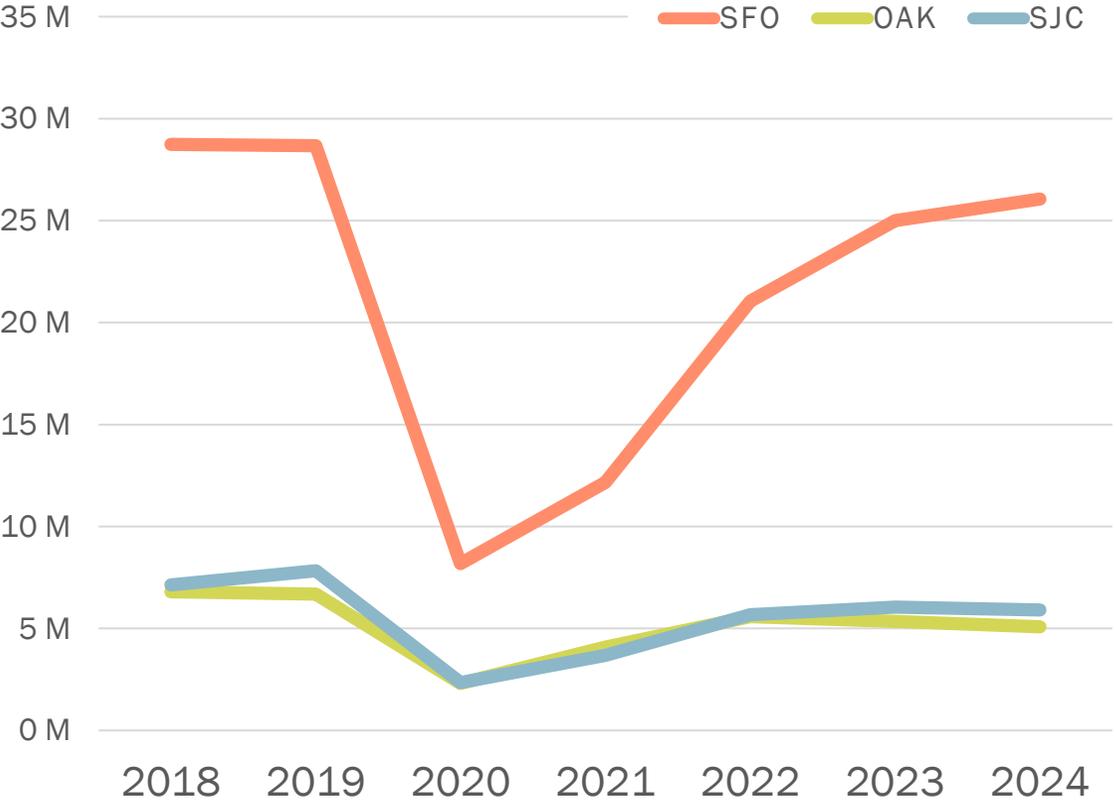
Note: The occupancy measure is a percentage that divides that number, averaged weekly, divided by a pre-COVID baseline.  
Source: Kastle Systems, via San Francisco Economic Recovery Dashboards.  
<https://www.sf.gov/data/san-francisco-office-attendance>

# Visitor travel

## Accommodation occupancy rate



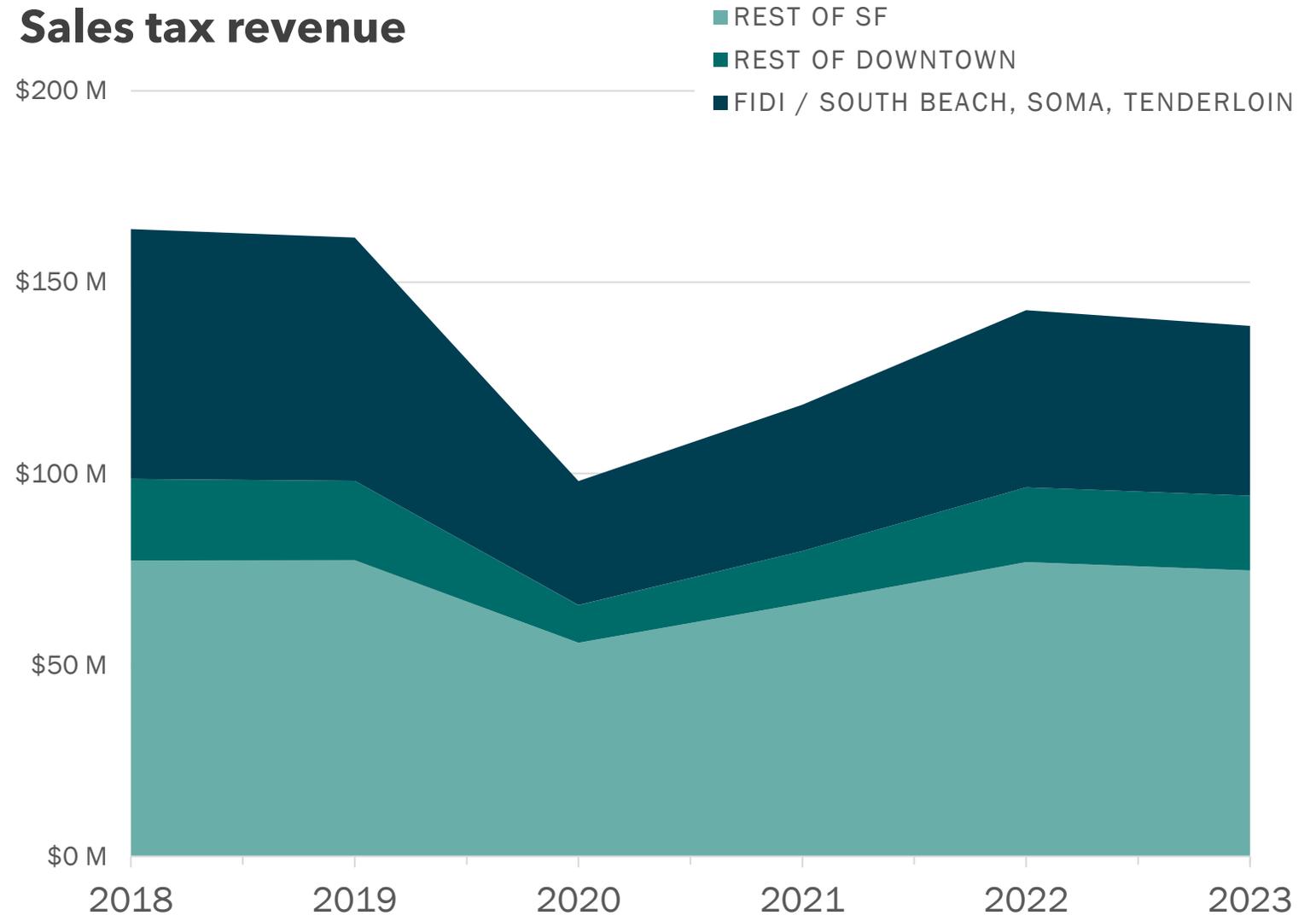
## Airport enplanements



# Sales tax

- Financial District / South Beach, South of Market, and the Tenderloin accounts for 83% of the lower sales tax revenue in San Francisco

## Sales tax revenue



# Conclusions

- Downtown trips remain lower than pre-COVID
- Mode share: automobile increased; transit/walk/bike decreased
- Composition of travelers to Downtown shifted to be less regional and more local
- Emerging congestion on some freeways for part of the day

# Thank you.

## **Chun Ho Chow**

Transportation Modeler  
chun.ho.chow@sfcta.org  
415-522-4834 office



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