Downtown Travel Study

San Francisco
County Transportation
Authority

Final Report: May 2025

Acknowledgments

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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.

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

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:

DOWNTOWN TRAVEL TRENDS[1]

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

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.

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%).

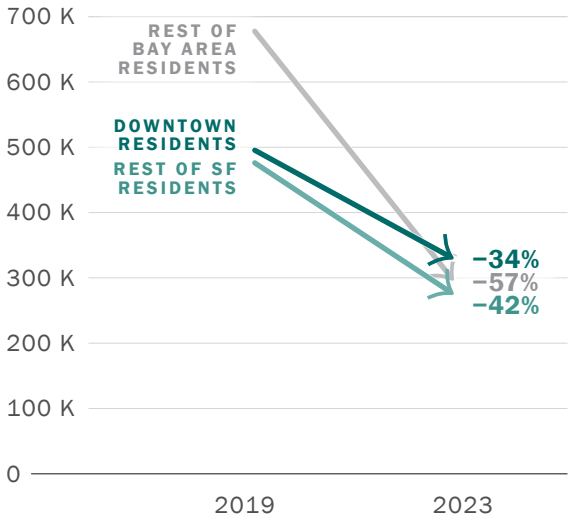
Downtown San Francisco, as defined in this report

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.**

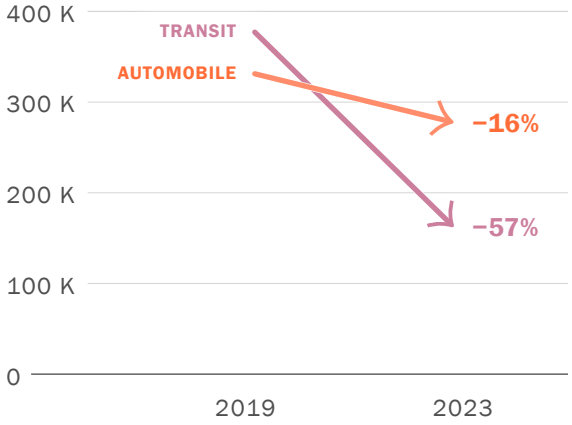
Typical adult weekday trips to/from/within Downtown by home location, 2019 – 2023



Source: travel diary survey

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

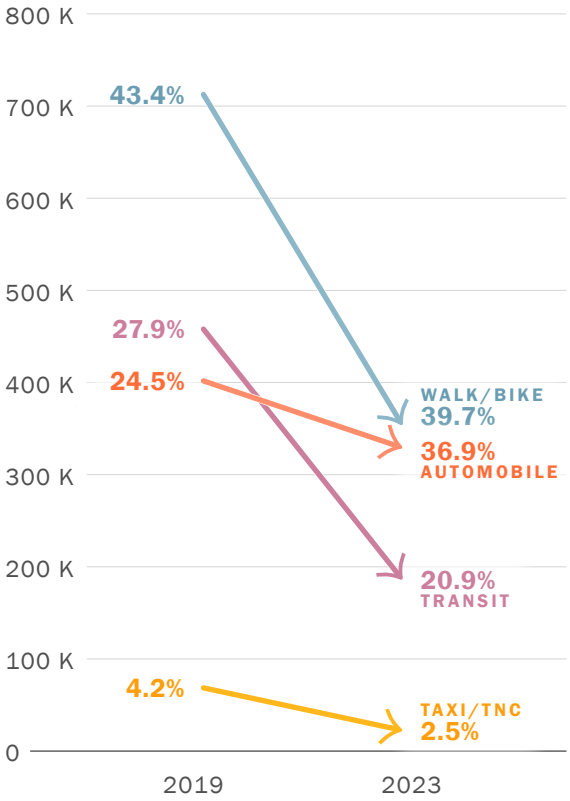


Source: Travel diary survey

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.

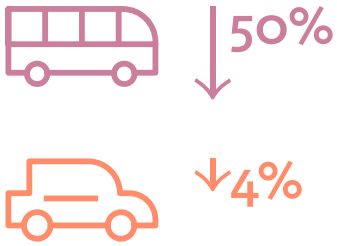
Typical adult weekday trips to/from/within Downtown by mode, 2019 – 2023



Source: travel diary survey

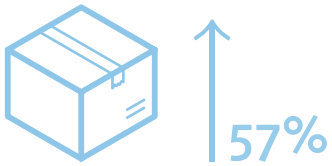
DOWNTOWN TRAVEL TRENDS (continued)

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%.



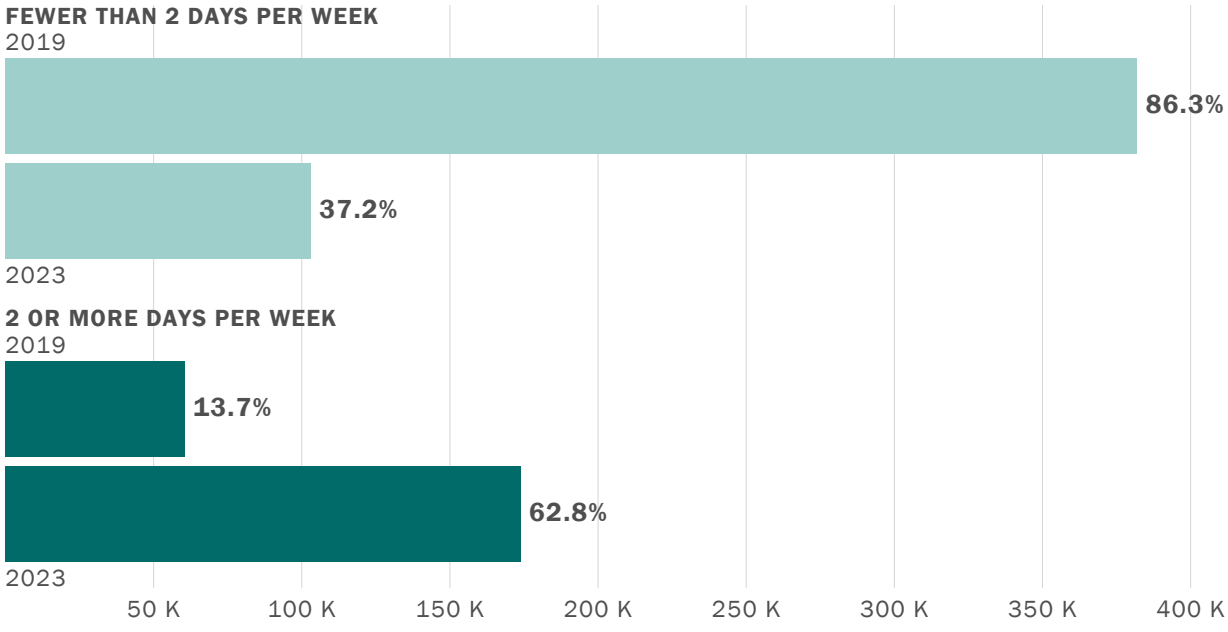
Telecommuting rates of San Francisco residents have been dropping to 24% in 2023, but remain significantly elevated compared with pre-pandemic rates (7% in 2019) and higher than residents of the rest of the Bay Area.

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

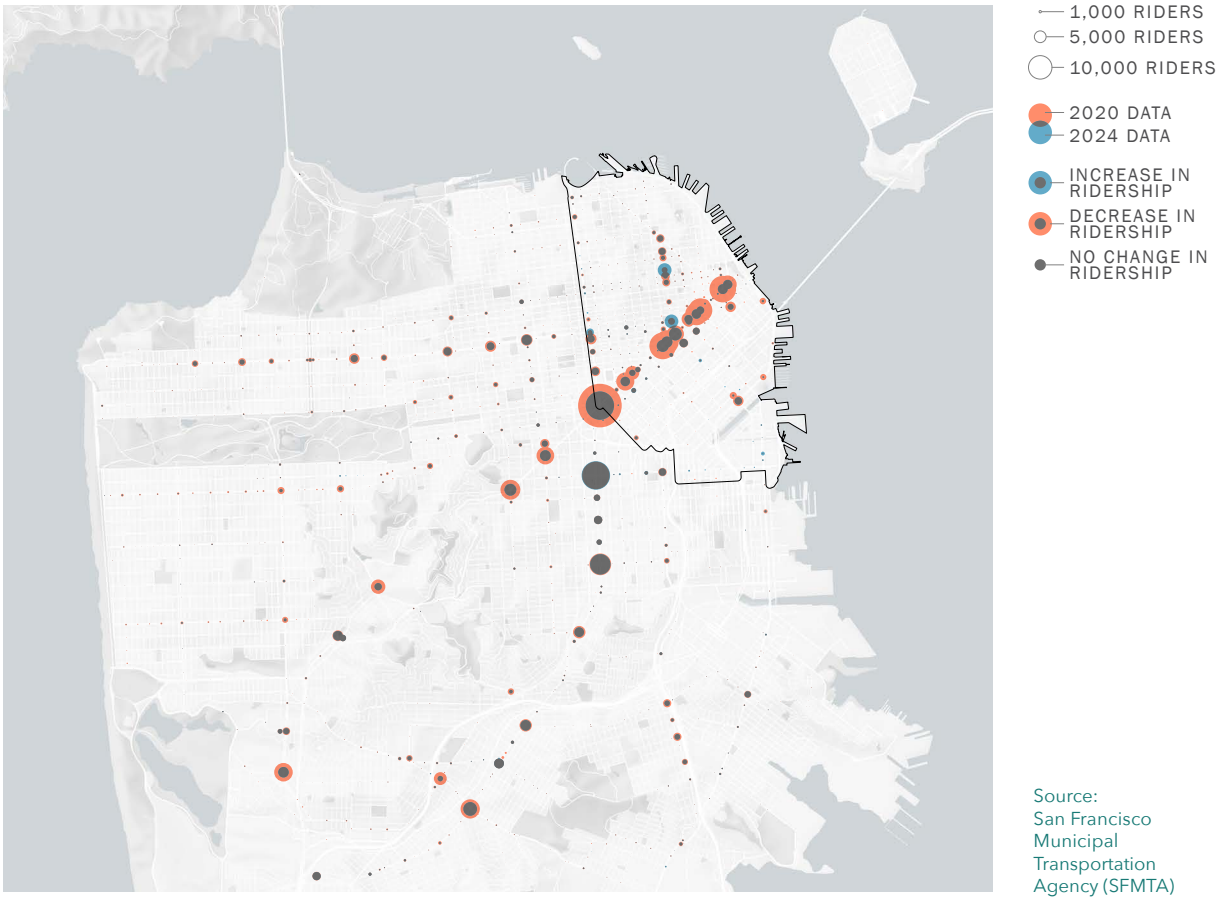


Source: travel diary survey

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



Source: San Francisco Municipal Transportation Agency (SFMTA)

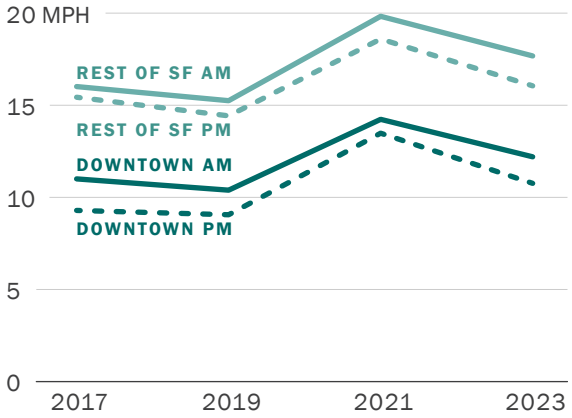
BART ridership continues to recover, though still remaining well below pre-pandemic levels. **BART ridership recovery is more robust on weekends than weekdays and outside the Downtown core of San Francisco than within.** Downtown stations ridership recovered to 36% of 2019 ridership by 2024 for weekdays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

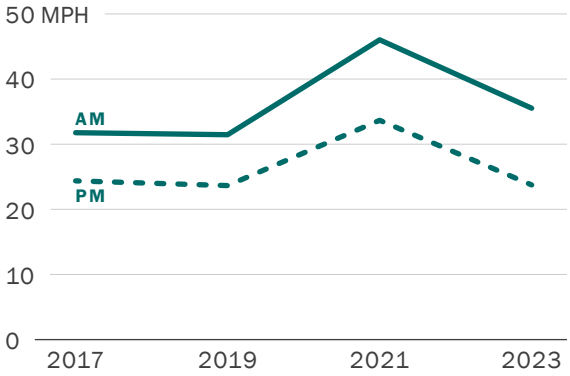
Weekday peak automobile speeds on CMP network surface arterials in Downtown and the rest of San Francisco, 2017 – 2023



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).

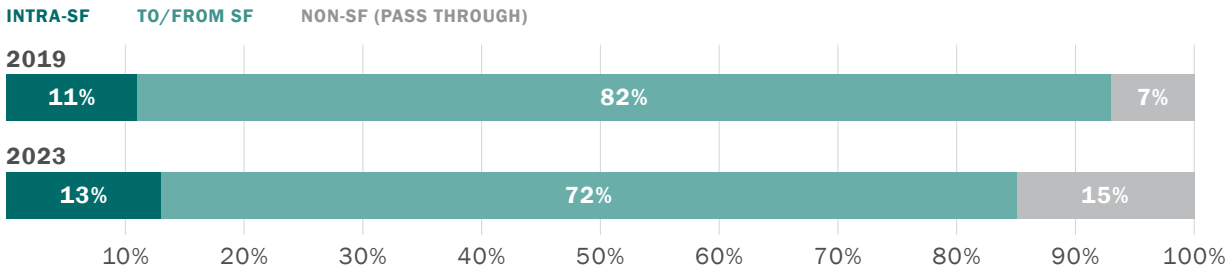
Weekday peak automobile speeds on CMP network freeways, 2017 – 2023



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



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.

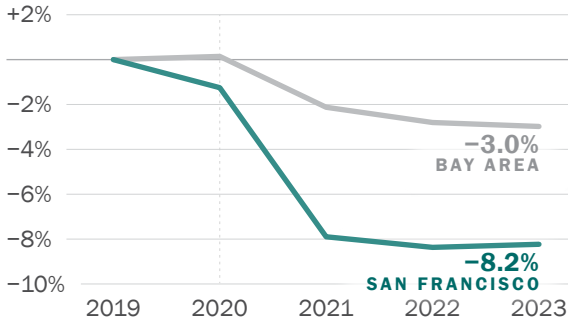
San Francisco–Oakland Bay Bridge (Bay Bridge) and Golden Gate Bridge volumes are 9% and 16% lower, respectively, than pre-pandemic, but **volumes at the San Mateo County screenline have returned to 2019 levels**.

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%.

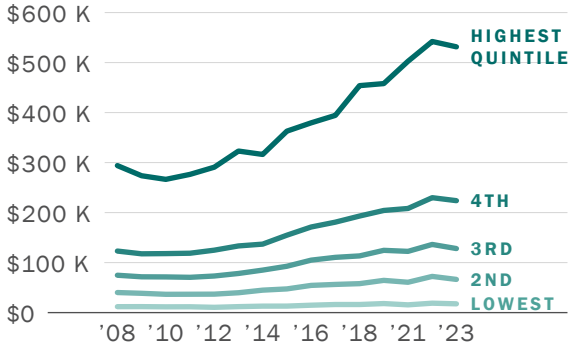
Percentage change in population in San Francisco and the Bay Area, 2019 – 2023



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.

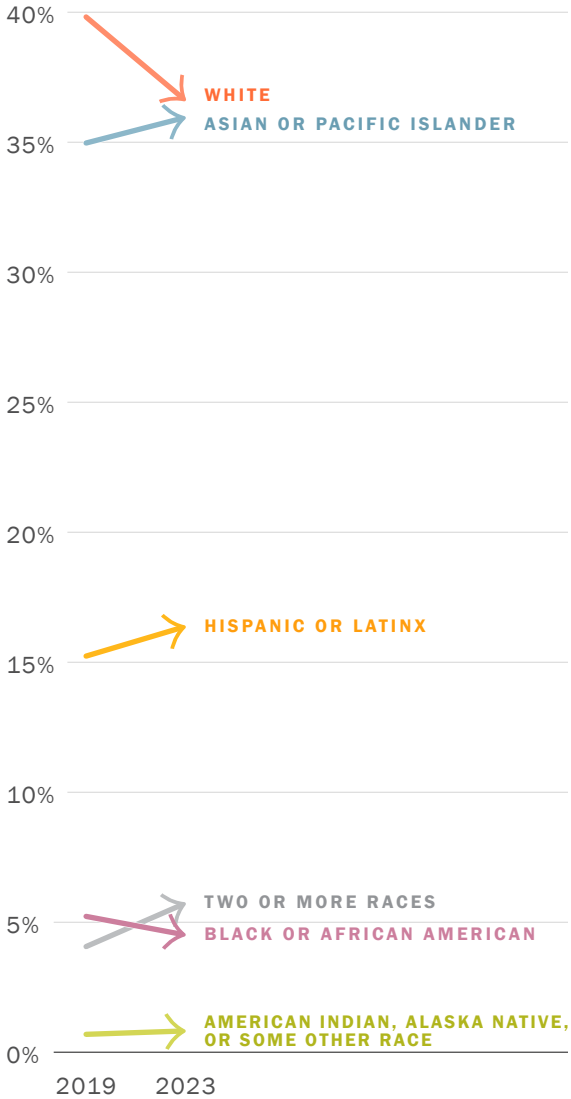
Mean household income in each quintile for San Francisco



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

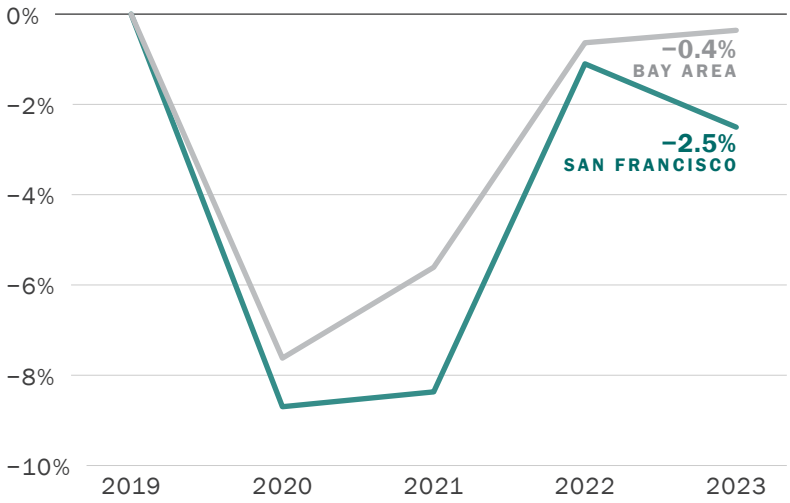


Source: U.S. Census Bureau. Hispanic or Latino Origin by Race. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table C03002, 2019 and 2023.

ECONOMY & EMPLOYMENT

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

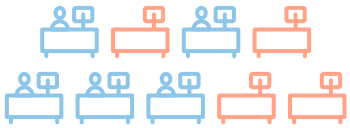
Percentage change in total employment by workplace in San Francisco and the Bay Area, 2019 – 2023



Source: California Employment Development Department, Current Employment Statistics.

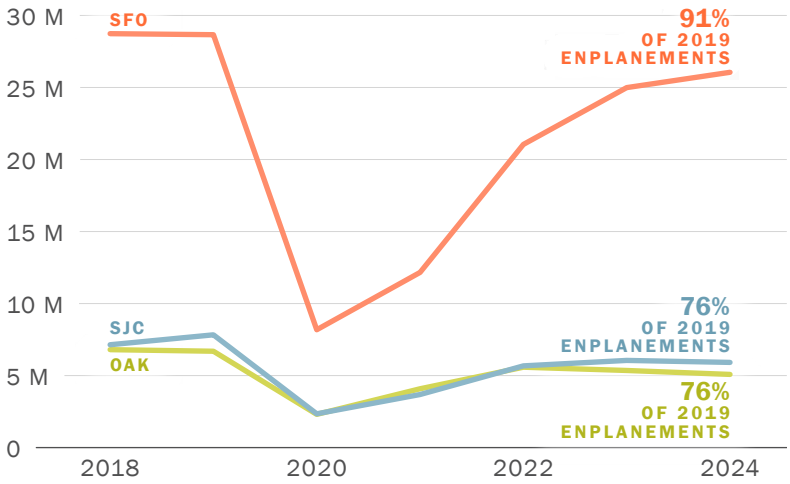
Office rental market vacancy is slowly reducing but remains at just below 37% at the end of 2024.

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%).

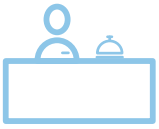
Airport enplanements at SFO, OAK, and SJC, 2018 – 2024



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%.

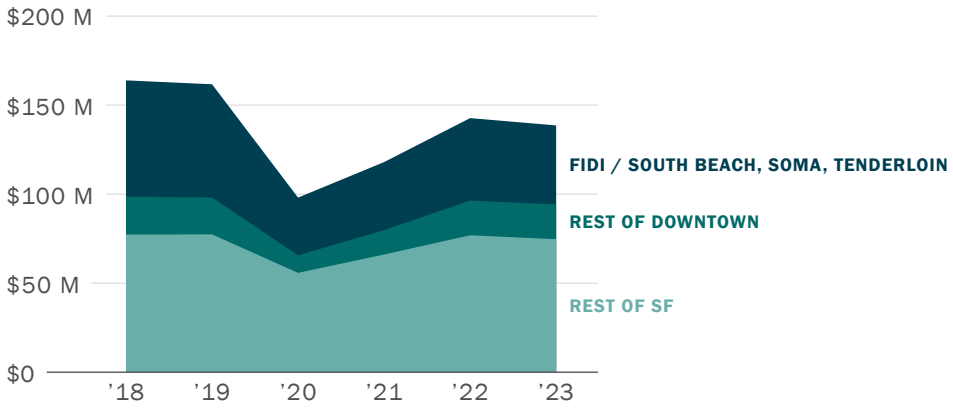
Employment in the leisure and hospitality industries is increasing, but remains below pre-pandemic levels.



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.

1. Introduction

The COVID-19 virus first appeared in late 2019, and by March 11, 2020, the World Health Organization had declared COVID-19 a global pandemic.

The response to this global health crisis by elected officials, public agencies, businesses, and individuals was swift and dramatic, helping to save lives and prioritizing essential workers and travel. These responses to the pandemic have had significant short-term and long-term effects. Perhaps no place has been as visibly impacted as Downtown San Francisco. Downtown office attendance dropped to less than 20%. Downtown hotels and businesses shuttered as resident, commuter, and visitor trips fell significantly. 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.

This report provides quantitative information on changes since the pandemic in the travel behavior, transportation system performance, population, economy, and sales tax revenues of both Downtown San Francisco as well as the city and county overall. The report also provides a broad set of metrics and is intended to help the Board of the Transportation Authority, as San Francisco's designated county Congestion Management Agency, and the general public better understand significant recent changes in San Francisco and to inform public policy and investment decision-making.

This document collects and summarizes information from a wide variety of sources to present findings organized into topic areas:

- Downtown travel trends
- Transportation system performance
- Population & demographics
- Economy & employment

While the 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.

2. Defining 'Downtown'

There is no single definition of Downtown San Francisco. For this report, we define Downtown broadly, as roughly bounded by Van Ness Avenue and 11th Street to the west, the Bay to the north and east, and 16th/17th Streets to the south. This area corresponds to the City's Analysis Neighborhoods of Financial District / South Beach, South of Market, Tenderloin, Chinatown, North Beach, Nob Hill, Russian Hill, and Mission Bay. To the greatest extent possible, we present the data using this Downtown definition. However, not all data is available for this geography, so some metrics are only reported at a citywide or other level.

Figure 2-1. Downtown San Francisco, as defined in this report

Download map data (GeoPackage)

In this report, unless otherwise noted, the "rest of San Francisco" refers to all areas in San Francisco that are not in the Downtown as described, and the "rest of the Bay Area" refers to the eight other counties within the Bay Area, including Marin, Sonoma, Napa, Solano, Contra Costa, Alameda, Santa Clara, and San Mateo.

3. Downtown Travel Trends

The COVID-19 pandemic disrupted peoples' health, livelihoods, activities, and the economy overall. These changes affected peoples' choices, including where to live, the amount and type of activities they participated in. Employers also reduced workforces and some workers were permitted to telecommute. No part of the Bay Area was more significantly impacted than Downtown San Francisco. This section summarizes changes in travel behaviors between 2019 and 2023, as primarily revealed by data from detailed household travel diary surveys collected by the Transportation Authority in partnership with the Metropolitan Transportation Commission (MTC) and the Santa Clara Valley Transportation Authority. Since the household travel diary surveys only include households living in the Bay Area, the data in this section do not reflect changes in travel behavior of visitors from outside the Bay Area nor changes in truck and delivery trips. In addition, this data is limited to trips on typical weekdays (Tuesday to Thursday) made by adults (age 18 or above) only.

3.1 CHANGES IN TOTAL TRIPS

Increased levels of telecommuting, together with other pandemic-induced travel behavior changes, affected the number of trips to/from/within Downtown. The total number of typical weekday trips to/from/within Downtown declined by 46% between 2019 and 2023, with almost 750,000 fewer trips in 2023. Overall, trips to/from/within the rest of San Francisco and to/from/within the rest of the Bay Area also decreased, but at a lower rate, with each declining approximately 25% between 2019 and 2023.

Table 3-1. Change in typical weekday trips to/from/within each geography

TO/FROM/WITHIN	2019	2023	DIFFERENCE	% DIFFERENCE
Downtown	1,641,000	893,000	−748,000	−46%
Rest of SF	2,698,000	2,015,000	−683,000	−25%
Rest of Bay Area	24,540,000	18,433,000	−6,107,000	−25%

Source: travel diary survey

3.2 CHANGE IN DOWNTOWN TRIPS

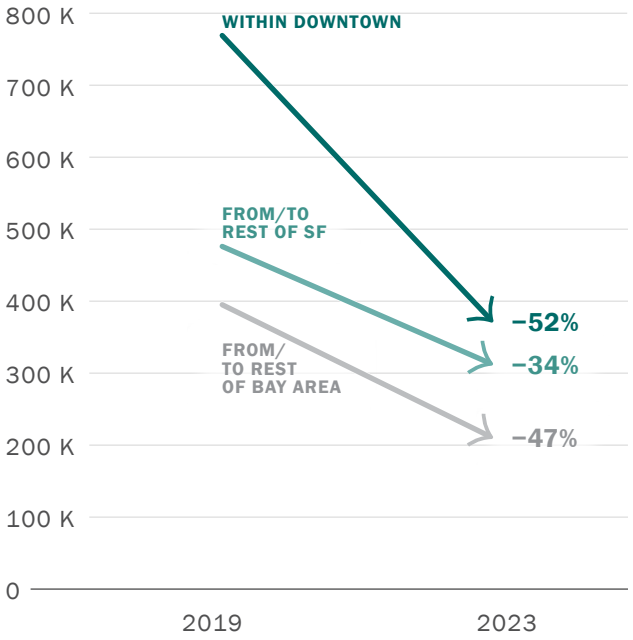
Approximately two-thirds of the decline in tripmaking to/from/within Downtown was due to fewer trips being made within Downtown itself, which declined 52%. The remaining decline in tripmaking to Downtown was due in almost equal parts to fewer trips from the rest of San Francisco and fewer trips from the rest of the Bay Area.

Table 3-2. Change in typical weekday trips to/from Downtown by geography

	2019	2023	DIFFERENCE	% DIFFERENCE
Within Downtown	769,000	371,000	−398,000	−52%
From/To Rest of SF	476,000	312,000	−164,000	−34%
From/To Rest of Bay Area	395,000	210,000	−185,000	−47%
Total	**1,640,000**	**893,000**	**−747,000**	**−46%**

Source: travel diary survey

Figure 3-1. Typical adult weekday trips to/from Downtown by geography, 2019 – 2023

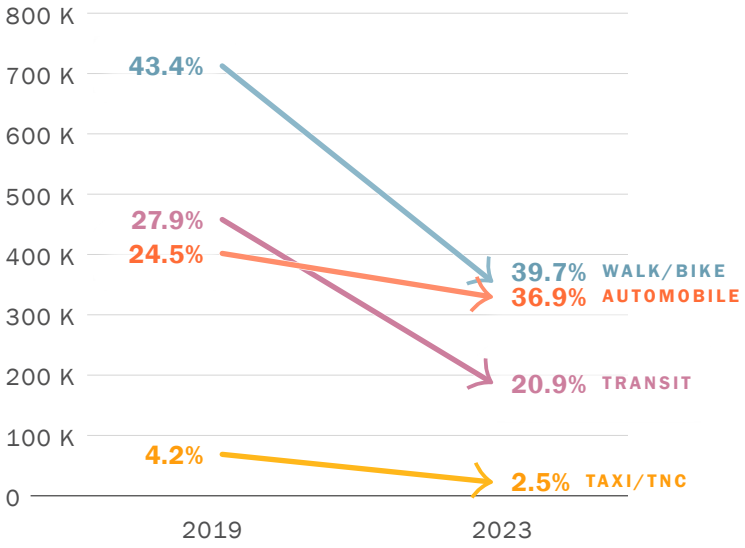


Source: travel diary survey
Download chart data (CSV)

3.3 CHANGE IN DOWNTOWN TRIPS BY MODE

Downtown has historically had the region's densest concentration of employment, housing units, and other trip destinations accessible by walking and biking, robust local and regional transit services, and an extensive automobile network. In 2019, nonmotorized travel (walking and biking) accounted for 43% of trips, transit accounted for 28% of trips, and automobiles accounted for 24% of trips to/from/within Downtown. Between 2019 and 2023, nonmotorized and transit trips declined by more than half, while automobile trips only declined by 18%, significantly increasing the share of all Downtown trips made by automobile from 24% to 37% and reducing the transit share from 28% to 21%.

Figure 3-2. Typical adult weekday trips to/from/within Downtown by mode, 2019 – 2023

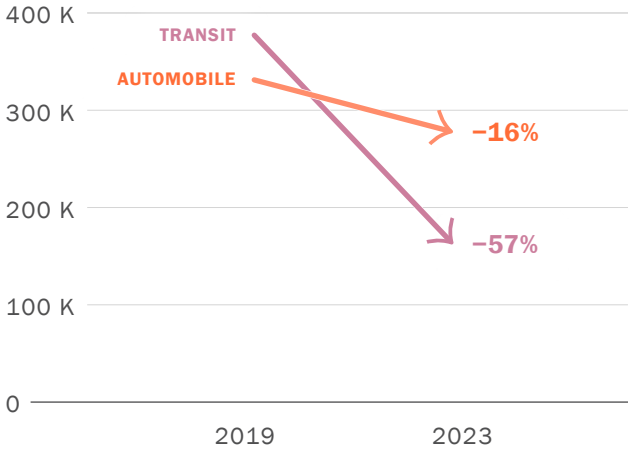


Source: travel diary survey
Download chart data (CSV)

Change in Drive Trips into / out of Downtown

Automobile trips between Downtown and the rest of San Francisco / Bay Area dropped 16% from 331,000 trips in 2019 to 278,000 trips in 2023 – a much smaller percentage decrease than that for transit (–57%).

Figure 3-3. Typical adult weekday trips into / out of Downtown[2] by mode, 2019 – 2023



Source: travel diary survey
Note: Transit includes trips by school bus, though the school bus mode share is 0% (for 2019) or vanishingly small (less than 0.01% for trips to/from/within Downtown for 2022).
Download chart data (CSV)

2 From/to rest of SF / rest of Bay Area

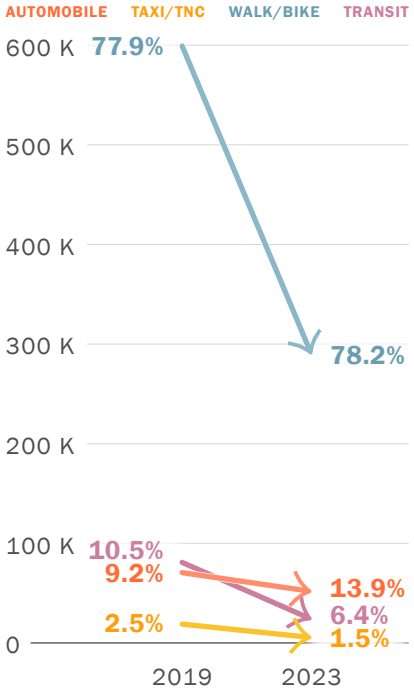
3.4 CHANGE IN DOWNTOWN TRIPS BY MODE AND GEOGRAPHY

Trips within Downtown, between Downtown and the rest of San Francisco, and between Downtown and the rest of the Bay Area reflect a mix of different travel modes being used by geography. Within Downtown, most trips both before and after the pandemic have been walk trips. The number of walk trips within Downtown has diminished by 52%, while the number of transit trips within Downtown dropped by over 70%.

In 2019, the largest share of trips between Downtown and the rest of San Francisco were by transit, but these transit trips declined by half (–49%) by 2023. In contrast, drive trips between Downtown and the rest of San Francisco increased by 3% and driving has become the dominant mode of transportation between Downtown and the other parts of San Francisco.

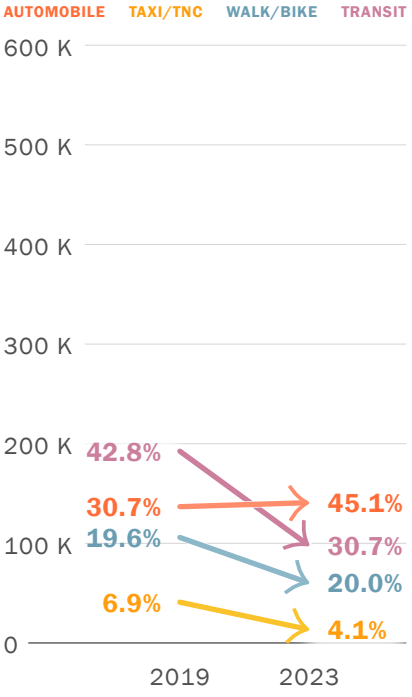
Trips between Downtown and the rest of the Bay Area and declined for both transit and automobiles (there is only a negligible number of nonmotorized trips in this travel market). Transit trips declined by 65% while automobile trips declined by 30%, resulting in the regional trip automobile mode share between Downtown and the rest of the Bay Area increasing from 49% to 65%.

Figure 3-4. Typical adult weekday trips **within Downtown** by mode, 2019 – 2023



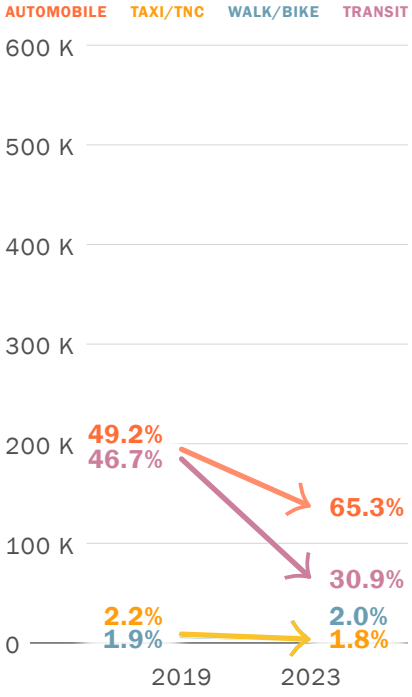
Source: travel diary survey
Download chart data (CSV)

Figure 3-5. Typical adult weekday trips **between Downtown and rest of SF** by mode, 2019 – 2023



Source: travel diary survey
Download chart data (CSV)

Figure 3-6. Typical adult weekday trips **between Downtown and rest of Bay Area** by mode, 2019 – 2023



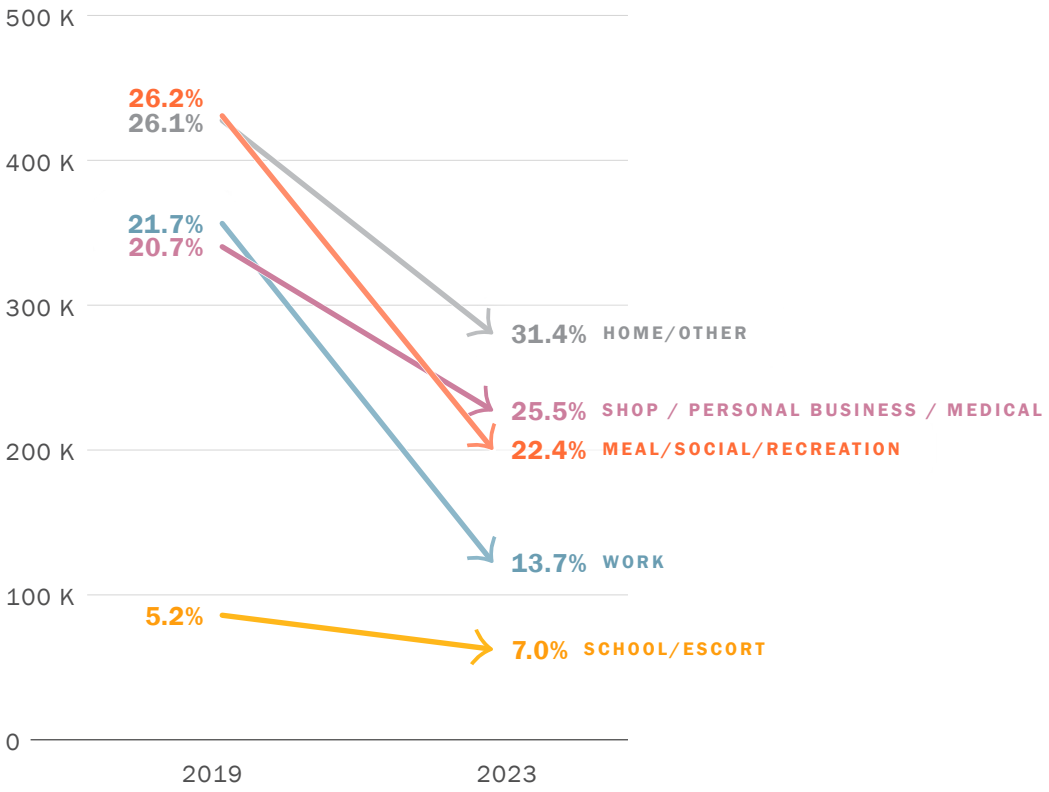
Source: travel diary survey
Download chart data (CSV)

Note: "Transit" here includes trips by school bus, though the school bus mode share is 0% (for 2019) or vanishingly small (less than 0.01% for trips to/from/within Downtown for 2022).

3.5 CHANGE IN DOWNTOWN TRIPS BY PURPOSE[3]

Prior to the pandemic, only 22% of trips to/from/within Downtown were explicitly for work. The COVID pandemic profoundly affected commute travel, and between 2019 and 2023, work trips to/from/within Downtown dropped by 66% from 356,000 to 112,000. Meal, social, and recreational trips dropped a similar amount, from 431,000 to 200,000 daily trips. Together, these purposes accounted for over 62% of the decline in trips to/from/within Downtown. Trips to/from/within Downtown for shopping, personal business, medical, school, and other purposes dropped less, declining between 28% and 35% between 2019 and 2023.

Figure 3-7. Typical adult weekday trips to/from/within Downtown by purpose, 2019 – 2023



Source: travel diary survey

Download chart data (CSV)

3 Purpose here refers to the destination purpose of a trip; e.g., a trip from work to home would be classified under "home/other".

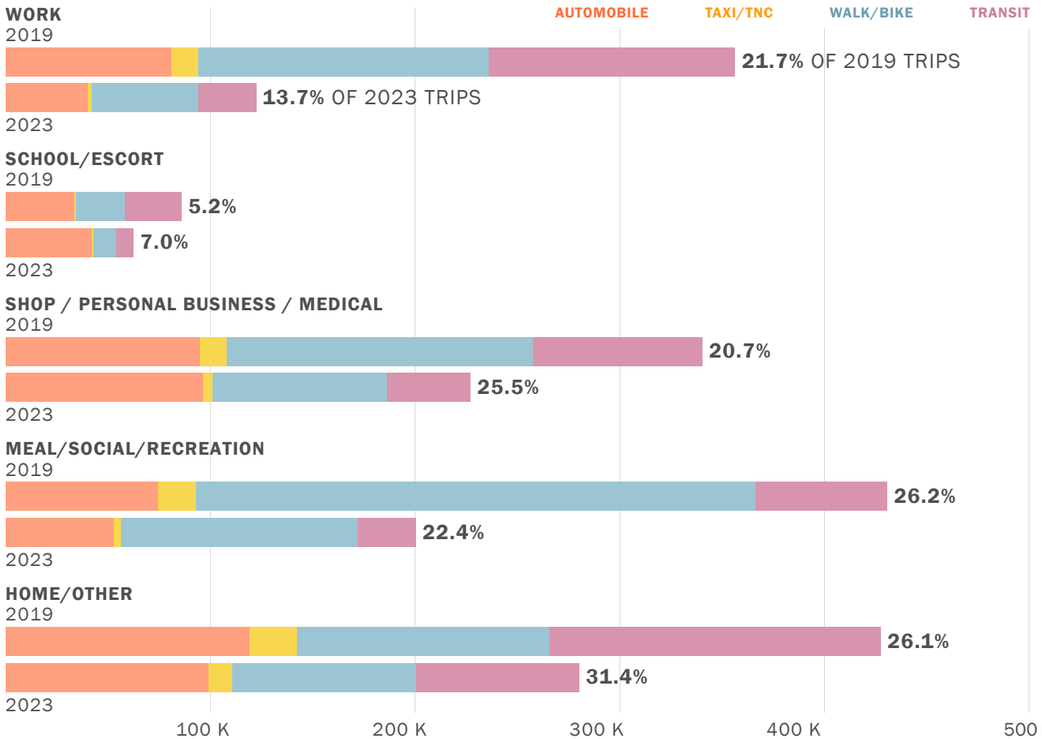
3.6 CHANGES IN DOWNTOWN TRIPS BY MODE AND PURPOSE[4]

The number of trips to/from/within Downtown by all purposes and all modes decreased, with two exceptions: there were approximately 10,000 additional automobile trips for school/escort and for shop / personal business / medical purposes.

Though the total number of trips decreased, the automobile mode share increased across all trip purposes. For Downtown work trips, the automobile mode share increased from 23% to 32%. The automobile mode share increased from 17% to 26% for meal/social/recreation trips, and mode and from 28% to 42% for shop / personal business / medical. The automobile mode share for Downtown school trips increased from 39% to 67%. The transit mode share decreased across all trip purposes, while the nonmotorized mode share increased for some purposes and decreased for others.

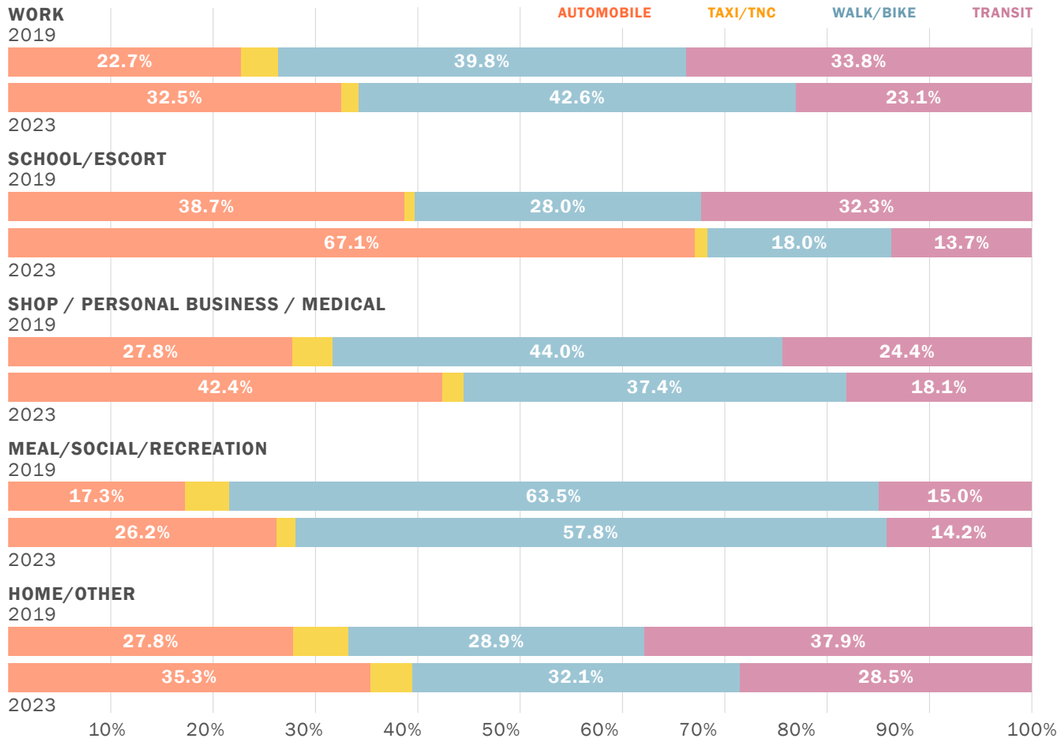
Though the total number of trips decreased, the automobile mode share increased across all trip purposes.

Figure 3-8. Typical adult weekday trips to/from/within Downtown by mode and purpose, 2019 – 2023



Source: travel diary survey
Download chart data (CSV)

Figure 3-9. Typical adult weekday trips to/from/within Downtown by mode share and purpose, 2019 – 2023



Source: travel diary survey
Download chart data (CSV)

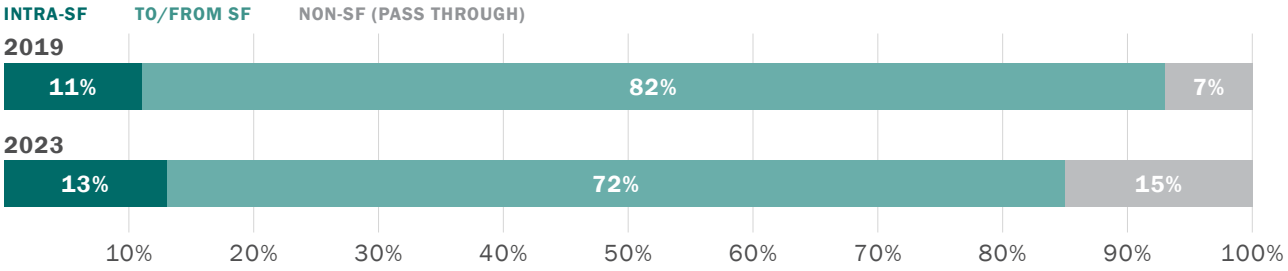
Note: "Transit" here includes trips by school bus, though the school bus mode share is 0% (for 2019) or vanishingly small (less than 0.01% for trips to/from/within Downtown for 2022).

4 Purpose here refers to the destination purpose of a trip; e.g., a trip from work to home would be classified under "home/other".

3.7 CHANGE IN FREEWAY TRIPS IN DOWNTOWN CORE BY GEOGRAPHY

With the changes in travel patterns during the pandemic, the mix of origins and destinations of automobile trips on the I-80 freeway segment in Downtown San Francisco[5] has also shifted. The share of automobile trips that are using that freeway segment to pass through San Francisco more than doubled (from 7% to 15%), whereas the share for automobile trips going to/from San Francisco decreased by 10% from 82% to 72%.

Figure 3-10. Share of Downtown I-80 automobile trips by origin/destination

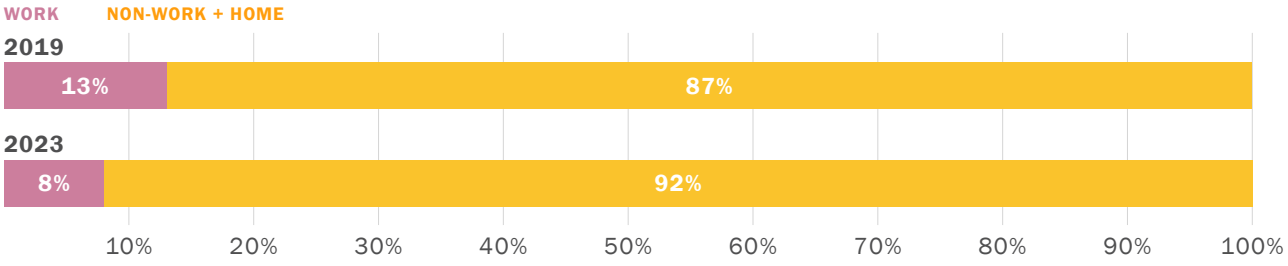


Source: travel diary survey
Download chart data (CSV)

3.8 CHANGE IN FREEWAY TRIPS IN DOWNTOWN CORE BY PURPOSE

The purpose mix of automobile trips on the I-80 freeway segment in Downtown San Francisco[6] has also shifted: trips with a work destination decreased from 13% to 8%, while trips with non-work destinations (including school and home) increased to over 90% in 2023. This indicates a broadening of the mix of trip purposes toward more discretionary trips (e.g., shopping, medical, and recreational).

Figure 3-11. Share of Downtown I-80 automobile trips by destination purpose



Source: travel diary survey
Download chart data (CSV)

5 Namely the section of I-80 between U.S. 101 and the San Francisco–Oakland Bay Bridge.

6 Namely the section of I-80 between U.S. 101 and the San Francisco–Oakland Bay Bridge.

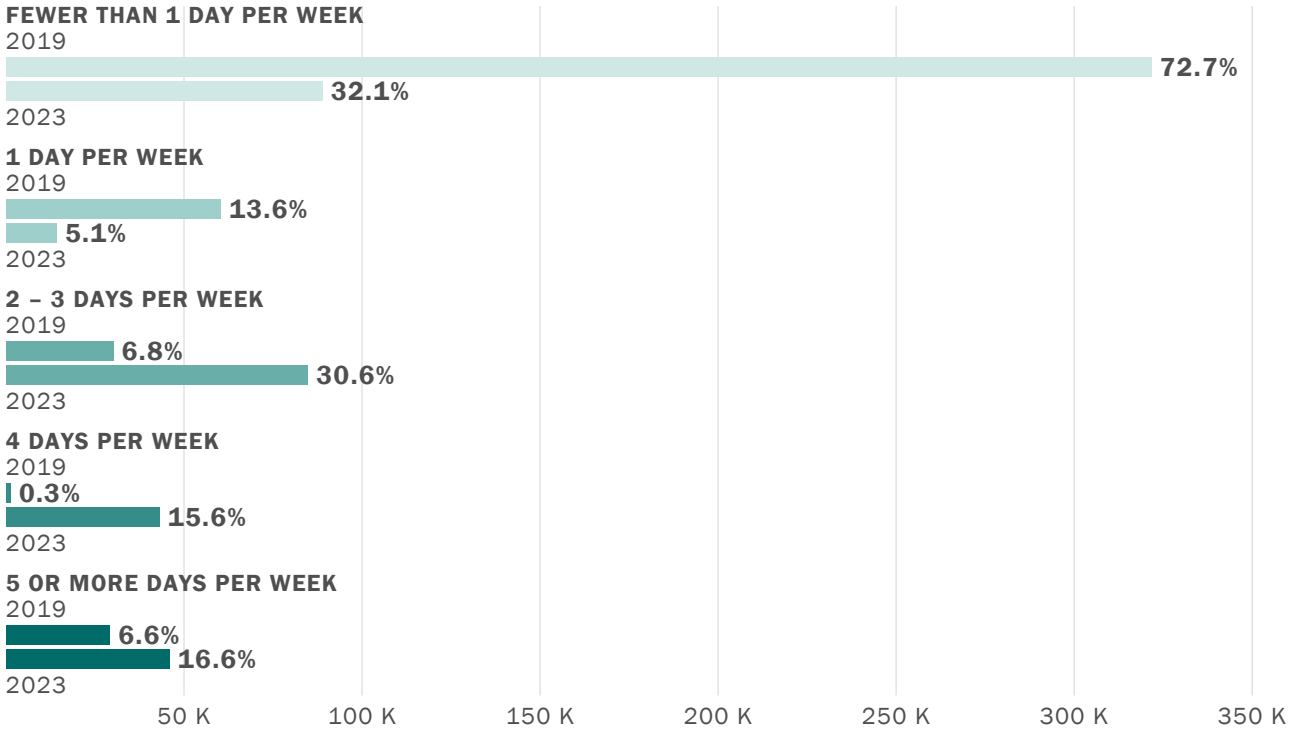
3.9 CHANGES IN DOWNTOWN AND CITYWIDE TELECOMMUTING

Between 2019 and 2023, the number of work trips to/from/within Downtown dropped by 66% from 356,000 to 112,000, as shown in Table 3-1. During this same period, the number of jobs in San Francisco only declined by 2.5%, from 763,000 jobs to 744,000 jobs. The gap between the big drop in work trips and the small change in jobs is likely due to increased levels of telecommuting.

Figure 3-12 summarizes changes in telecommuting frequency between 2019 and 2023 for workers who reported a work location in Downtown. Due to prevalence of telecommuting in the post-pandemic era, the number of workers who frequently telecommute to work locations that are based in Downtown is likely higher than shown in the figure, as some of these workers may no longer consider Downtown their regular work location for survey response purposes.

In 2019, 86% of Downtown workers reported that they worked fully or mostly in person (i.e., never telecommuted or telecommuted up to one day per week). By 2023, this share dropped to 37%. In contrast, the share of hybrid workers (i.e., telecommuting two to three days per week) increased from 7% in 2019 to 31% in 2023, and that for workers working mostly remotely (i.e., telecommuting four or more days per week) increased from 7% to 32%.

Figure 3-12. Telecommute frequency for Downtown workers, 2019 – 2023

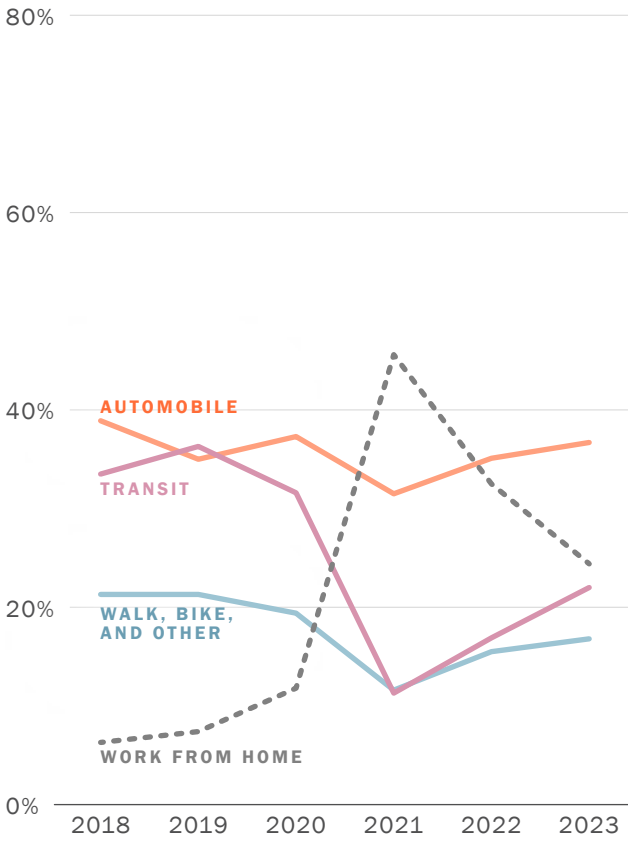


Source: travel diary survey
Note: Non-response rate was 5% in 2019 and close to 0% in 2023.
Download chart data (CSV)

The travel survey provides information on telecommuting, but only for the years 2019 and 2023. However, the U.S. Census Bureau reports trends in citywide primary commute mode[7] shares and telecommuting annually (Figure 3-13), though these trends are based on home location (rather than work location as depicted in Figure 3-12) and for San Francisco overall, not just Downtown.

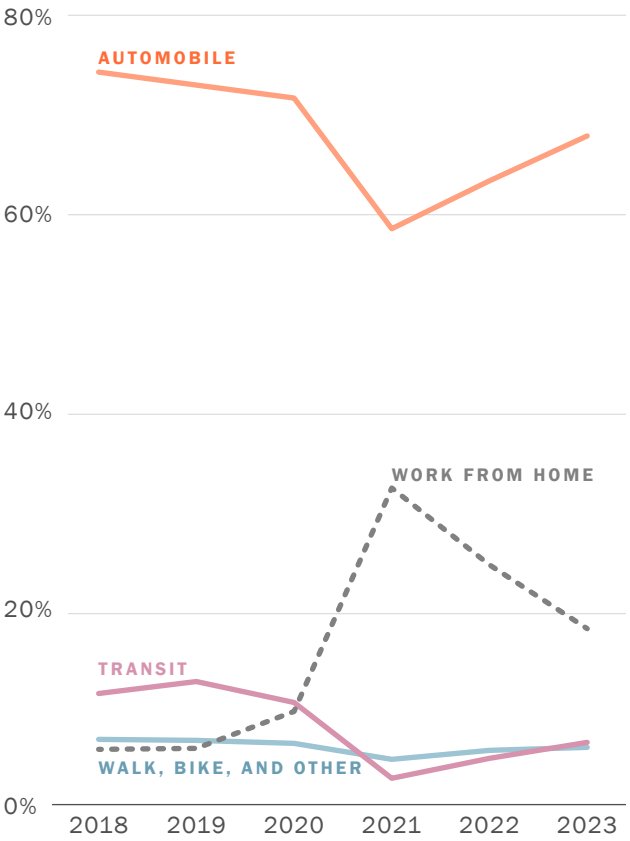
Prior to 2020, telecommute rates were consistent between San Francisco and the larger Bay Area at 6 to 7%. During the pandemic, telecommuting peaked at 45.6% for San Francisco and 32.6% for the Bay Area. By 2023, telecommuting has dropped to 24.4% for San Francisco and 18.5% for the Bay Area. Since 2021, telecommute rates for workers who live in San Francisco have consistently been higher than for Bay Area workers overall.

Figure 3-13. San Francisco primary commute mode share, 2018 – 2023



Source: MTC Vital Signs (vitalsigns.mtc.ca.gov/indicators/commute-mode-choice); U.S. Census Bureau, Means of transportation to work, American Community Survey, ACS 1-Year estimates detailed tables, Table B08301.
Download chart data (CSV)

Figure 3-14. Bay Area primary commute mode share, 2018 – 2023



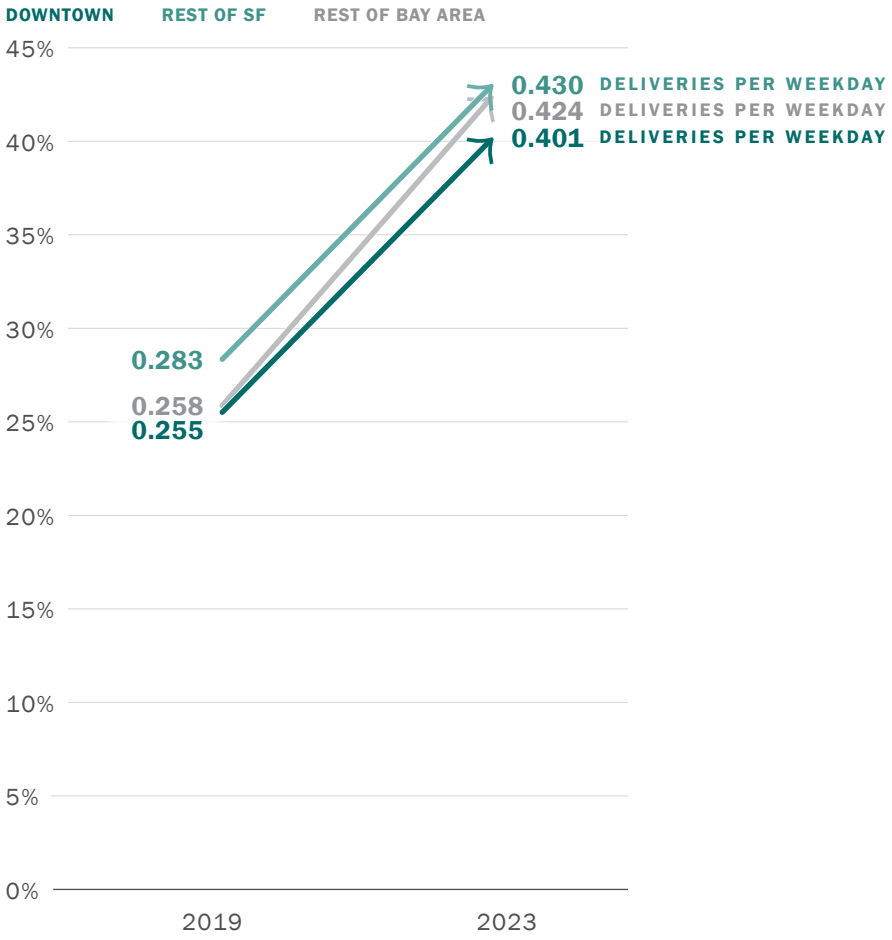
Source: MTC Vital Signs (vitalsigns.mtc.ca.gov/indicators/commute-mode-choice); U.S. Census Bureau, Means of transportation to work, American Community Survey, ACS 1-Year estimates detailed tables, Table B08301.
Download chart data (CSV)

7 This may be interpreted to mean the mode used three or more days out of the five days of the usual work week.

3.10 CHANGE IN DELIVERIES

Beyond the increased telecommuting, the pandemic has also induced shifts towards more online shopping and food deliveries. Delivery of packages, food, and groceries increased significantly between 2019 and 2023. In 2019, Downtown adult residents received at least 0.26 deliveries each typical weekday (i.e., on average at least one delivery every 3.9 weekdays); this rose to at least 0.40 deliveries each typical weekday (i.e., at least one delivery every 2.5 weekdays) in 2023 (a 57% increase). Delivery rates were lower for adults residing within Downtown than outside both pre- and post-pandemic.

Figure 3-15. Percentage of adults receiving deliveries (y-axis) or minimum number of deliveries received by adults (arrow tips) per typical weekday by residential geography, 2019 – 2023



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.

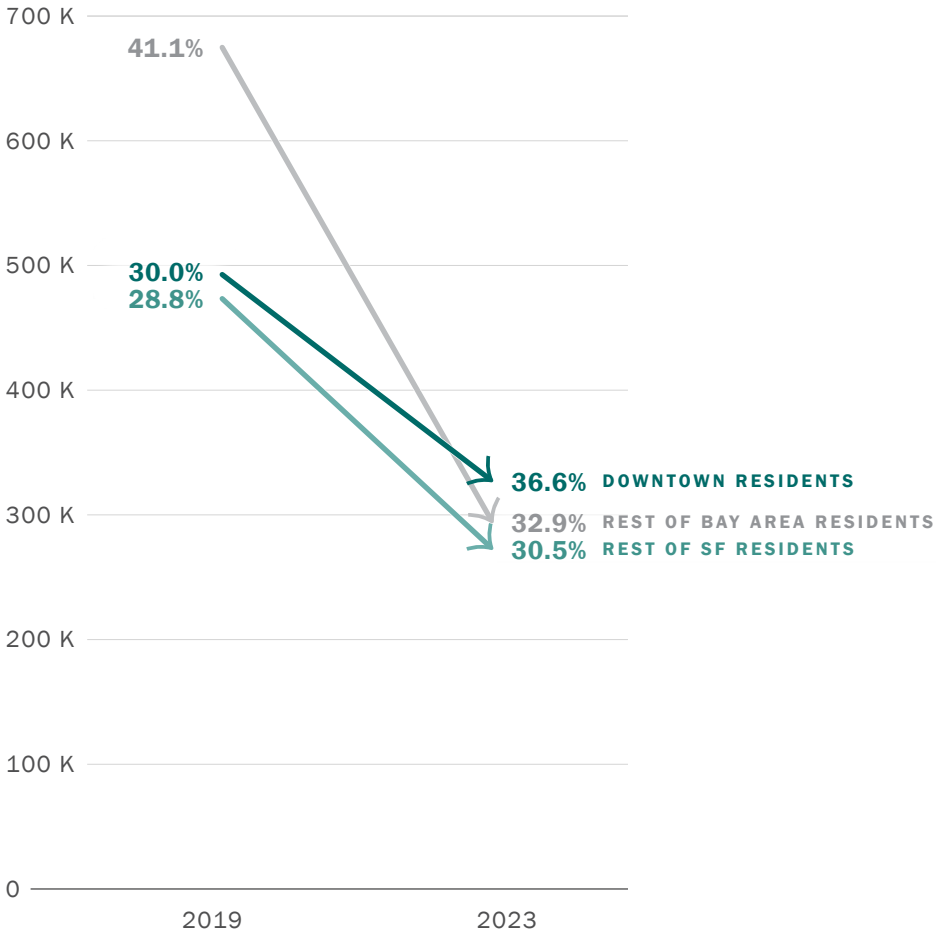
Download chart data (CSV)

3.11 CHANGE IN DOWNTOWN TRIPS BY HOME LOCATION

San Francisco's Downtown core is a regional center of activity, attracting people who live in the core, in other parts of San Francisco, and in other parts of the Bay Area. Figure 3-16 shows the change in the total number of trips to/from/within Downtown based on where travelers live. It shows that there were declines in Downtown tripmaking from people living everywhere in the Bay Area, resulting in local trips comprising a larger proportion of total trips.

Trips to/from/within Downtown made by Bay Area residents declined the sharpest by 57% from 675,000 to 293,000 daily trips which accounts for 51% of the decline in Downtown trips, while trips made by residents of the rest of San Francisco decreased by 42% from 473,000 to 272,000 daily trips. Trips to/from/within Downtown made by Downtown residents declined by 34%, from 493,000 to 327,000 daily trips.

Figure 3-16. Typical adult weekday trips to/from/within Downtown by home location, 2019 – 2023

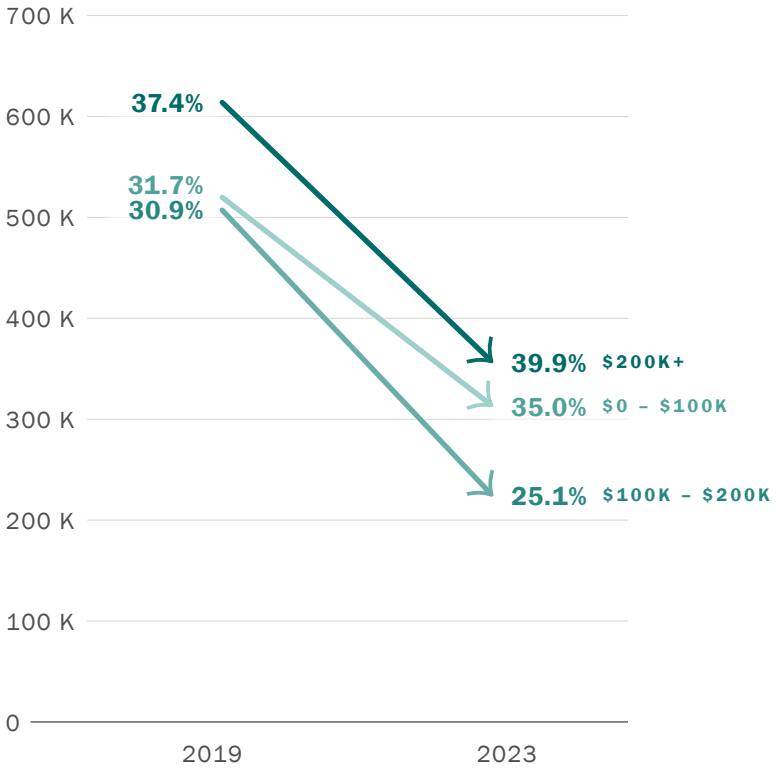


Source: travel diary survey
Note: The graph reports the share of trips being made by residents of each geography, e.g., 30.0% of trips to/from/within Downtown were made by residents of the rest of the Bay Area in 2019.
Download chart data (CSV)

3.12 CHANGE IN DOWNTOWN TRIPS BY INCOME

Between 2019 and 2023, trips to/from/within Downtown by adults in middle income households (household income $100k – $200k) declined by 56% – more than the 42% decline in trips by those in high income households (household income above $200k), and the 40% decline in trips by lower income households (household income below $100k). As a result, while the shares of trips to/from/within Downtown by adults in low and middle income households were comparable at 31 to 32% in 2019, the share of trips for low income households increased to 35%, whereas that for middle income households decreased to 25%.

Figure 3-17. Typical adult weekday trips to/from/within Downtown by household income, 2019 – 2023

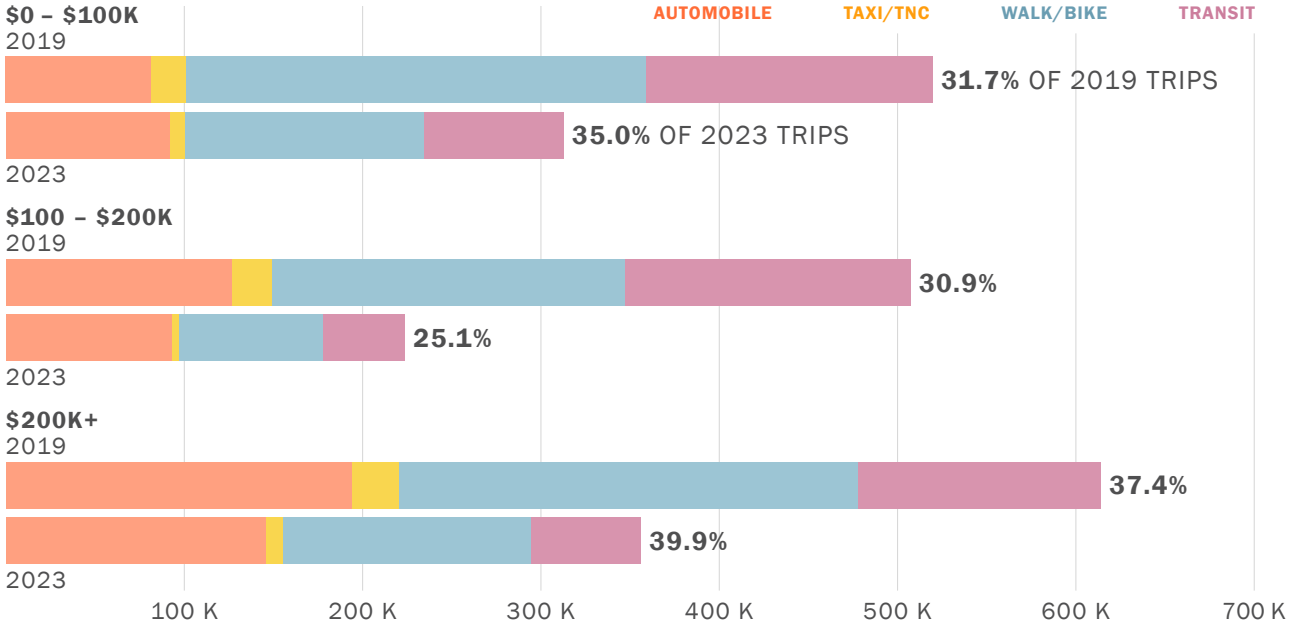


Source: travel diary survey
Download chart data (CSV)

3.13 CHANGE IN DOWNTOWN TRIPS BY MODE AND INCOME

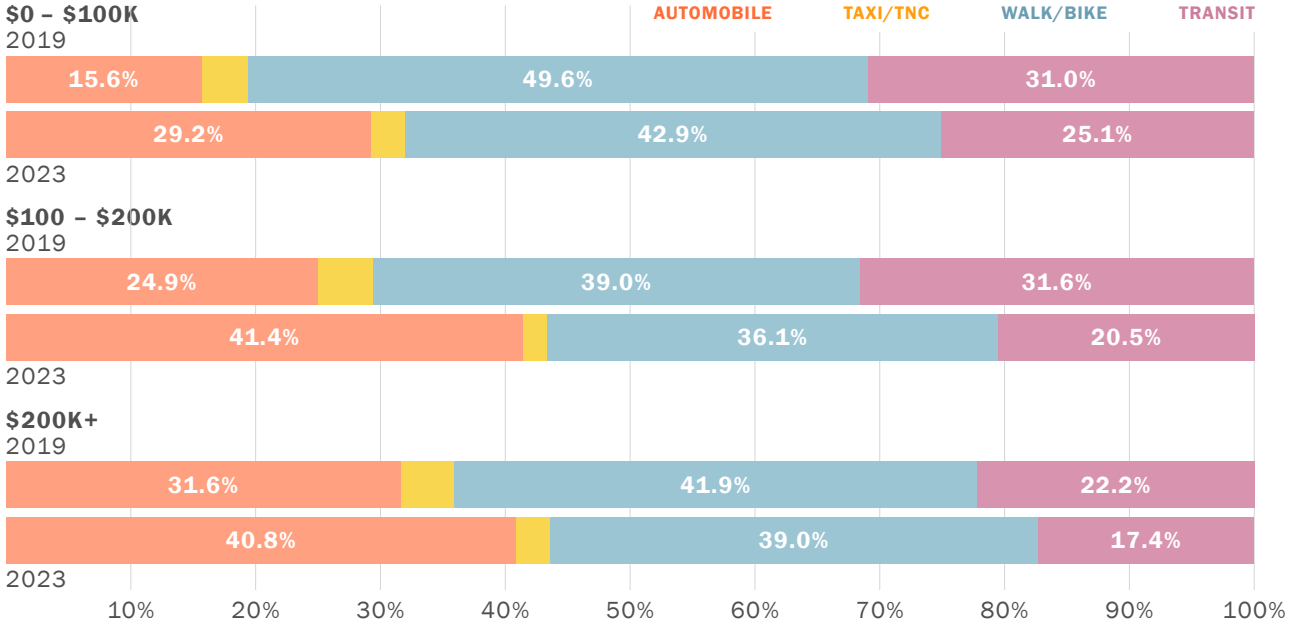
Automobile mode share increased and transit mode share decreased across all income levels. However, automobile mode share increased 14% to 16% for adults in lower and middle income households at (household income below $200k), which was sharper than the 9% increase for high income households (household income above $200k). Middle income adults also had the sharpest transit mode share decrease at 11% as compared to the 5% to 6% decreases for adults in the lower or high income levels.

Figure 3-18. Typical adult weekday trips to/from/within Downtown by mode and household income, 2019 – 2023



Source: travel diary survey
Download chart data (CSV)

Figure 3-19. Typical adult weekday trips to/from/within Downtown by mode share and household income, 2019 – 2023

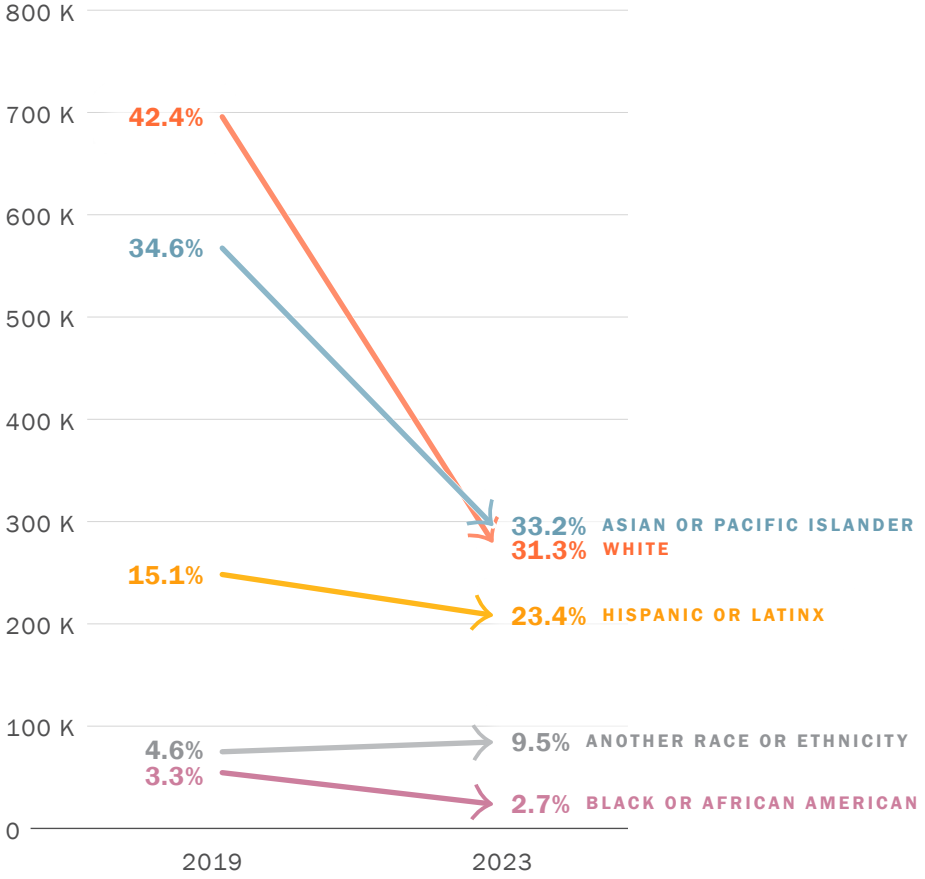


Source: travel diary survey
Note: "Transit" here includes trips by school bus, though the school bus mode share is 0% (for 2019) or vanishingly small (less than 0.01% for trips to/from/within Downtown for 2022).
Download chart data (CSV)

3.14 CHANGE IN DOWNTOWN TRIPS BY RACE/ETHNICITY

Between 2019 and 2023, trips to/from/within Downtown by White adults declined by 60% from 696,000 to 280,000 which accounts for 56% of the decline in Downtown trips. Trips by Asian and Pacific Islanders declined by 48% to 296,000, and trips by African Americans declined by 56% to 31,000. In contrast, trips to/from/within Downtown by Hispanic/Latinx adults declined by only 16% to 208,000 trips, and trips by adults of other race/ethnicities increased 12% to 84,000 typical weekday trips. As a result, in 2023, the percentage of trips to/from/within Downtown made by White adults has decreased to 31%, whereas the percentage by Hispanic/Latinx adults increased to 23%.

Figure 3-20. Typical adult weekday trips to/from/within Downtown by race/ethnicity, 2019 – 2023



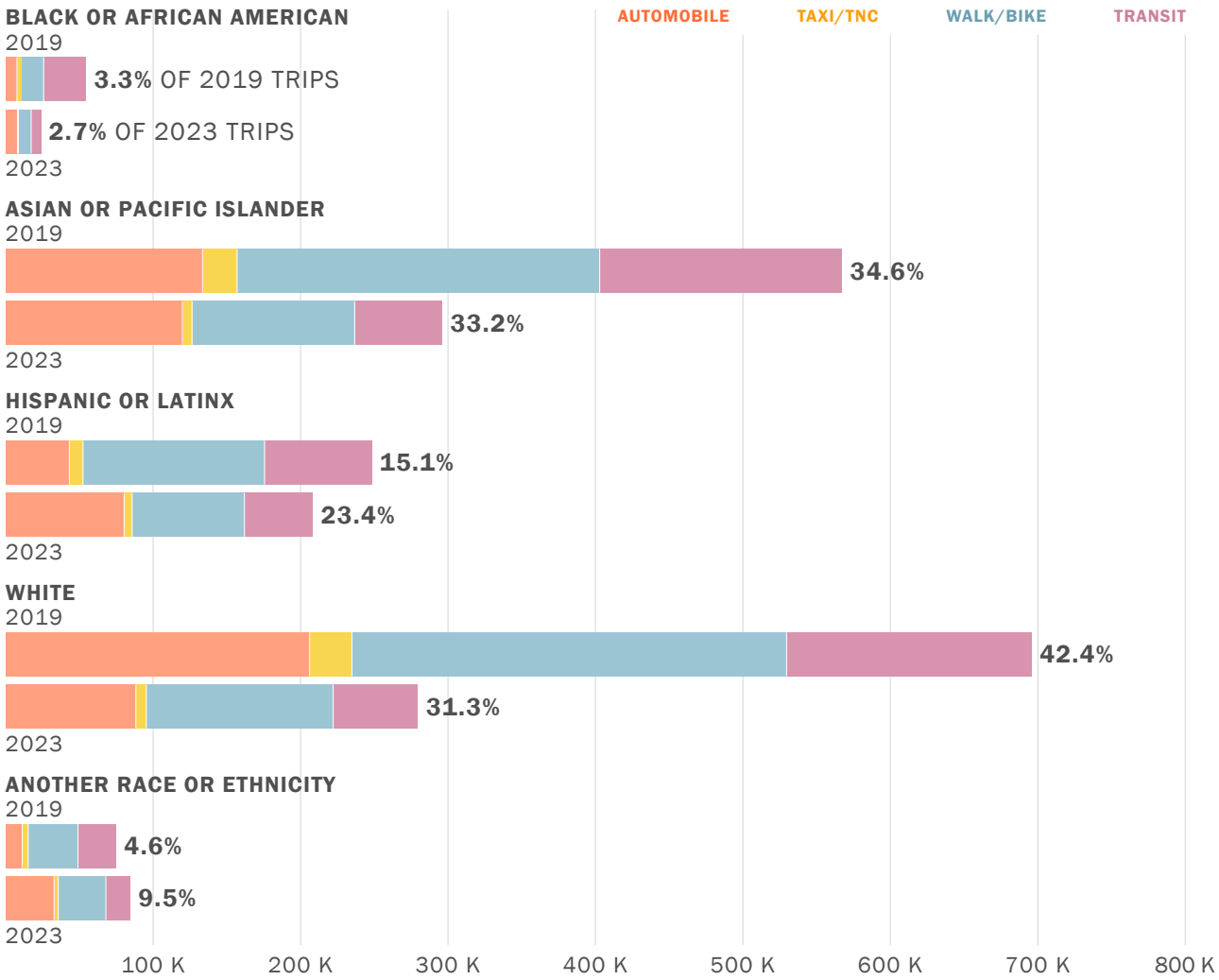
Source: travel diary survey
Download chart data (CSV)

3.15 CHANGE IN DOWNTOWN TRIPS BY MODE AND RACE/ETHNICITY

Between 2019 and 2023, the mode shares for people identifying as White stayed mostly the same, with only small increases in automobile (+2%) and walk/bike (+3%) shares, and a corresponding small decrease in transit (−3%) shares. However, the mode

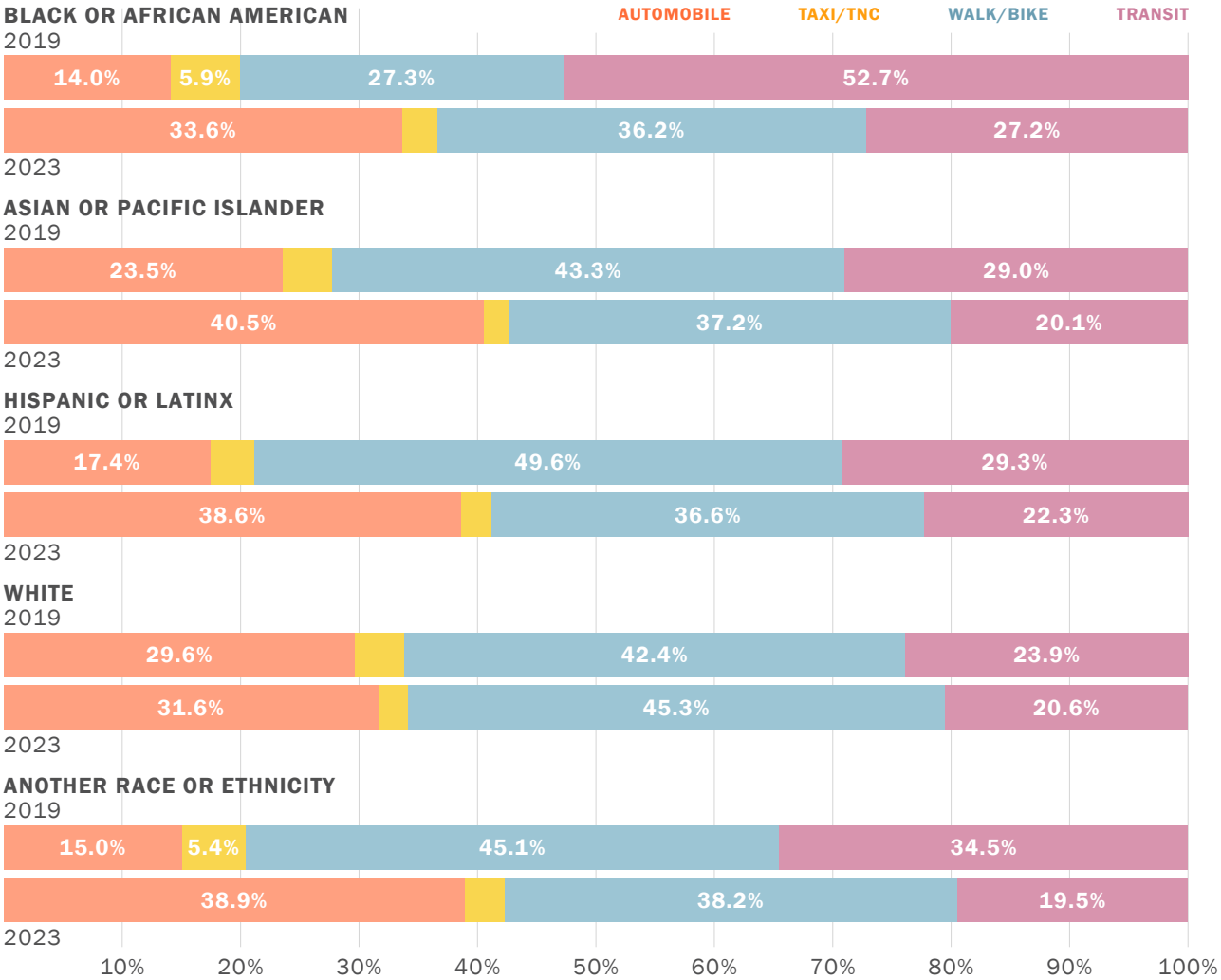
shares for all other racial/ethnicity groups shifted heavily away from walking/biking or transit and towards automobile use. Increases of 17 to 24% in automobile mode share were seen across all racial/ethnicity groups other than White. The walk/bike share also decreased by 6 to 13% for those identifying as Asian or Pacific Islander, Hispanic or Latinx, or Another Race/Ethnicity, while the transit share decreased only by 7 to 15% for these race/ethnicity groups. However, the Black or African American mode share changes for these two modes are flipped, with a large decrease for transit (−26%) and an increase for walk/bike (+9%).

Figure 3-21. Typical adult weekday trips to/from/within Downtown by mode and race/ethnicity, 2019 – 2023



Source: travel diary survey
Note: "Transit" here includes trips by school bus, though the school bus mode share is 0% (for 2019) or vanishingly small (less than 0.01% for trips to/from/within Downtown for 2022)
Download chart data (CSV)

Figure 3-22. Typical adult weekday trips to/from/within Downtown by mode share and race/ethnicity, 2019 – 2023



Source: travel diary survey
Note: "Transit" here includes trips by school bus, though the school bus mode share is 0% (for 2019) or vanishingly small (less than 0.01% for trips to/from/within Downtown for 2022)
Download chart data (CSV)

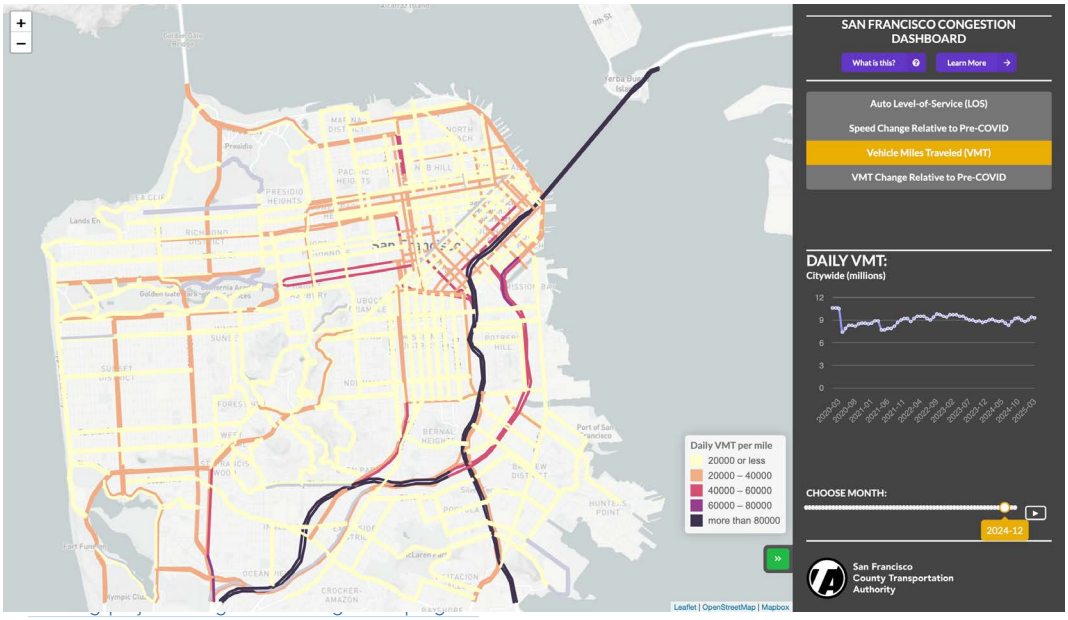
4. Transportation System Performance Trends

The Transportation Authority is the designated county Congestion Management Agency for San Francisco. As required by state law, the Transportation Authority monitors activity on San Francisco's multimodal transportation network (the Congestion Management Program (CMP) network) and analyzes the performance of our transportation network, including transit, cars, bicycles, and pedestrians. Transportation system performance monitoring can help identify strategies to achieve San Francisco's Transit First and other goals, including encouraging more efficient use of San Francisco's transportation system, managing congestion better, improving air quality, and facilitating sustainable development.

4.1 ROADWAY & TRANSIT SPEEDS

The Transportation Authority monitors roadway automobile and transit speeds on the CMP network every other year, during April and May.[8] Higher roadway speeds generally indicate lower roadway traffic volumes. Higher transit speeds also generally indicate less roadway traffic volumes and delay, or the presence of transit priority treatments or other operational considerations. A key goal of the Transportation Authority's congestion management program is to reduce the ratio of bus transit travel times to private vehicle travel times across the system, improving the overall competitiveness of transit. Citywide and roadway-level statistics for the automobile-transit speed ratio, together with other CMP metrics, can be found at the Congestion Management Program Map (cmp.sfcta.org). Also see the Transportation Authority's San Francisco Congestion Dashboard (congestion.sfcta.org) for monthly, segment-level changes in automobile speeds and estimated vehicle miles traveled (VMT).

Figure 4-1. San Francisco Congestion Dashboard (congestion.sfcta.org)



Surface Arterial Speeds

CMP surface arterial speeds increased significantly between 2019 and 2021 as the COVID pandemic reduced commuting and other travel. Within Downtown, average speeds on CMP network arterials increased from 10 miles per hour (MPH) to 14 MPH in the AM peak, and from 9 MPH to 13 MPH in the PM peak. Downtown speeds then declined between 2021 and 2023, but they remain faster than in 2019, indicating that congestion has not yet returned to pre-pandemic levels downtown. Changes in arterial speeds in the rest of San Francisco were consistent with the trends in Downtown, though speeds in the rest of San Francisco are noticeably faster than speeds in Downtown.

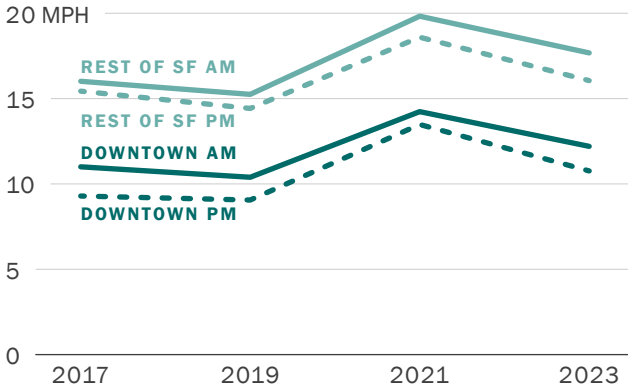
Freeway Speeds

The Transportation Authority also monitors automobile speeds on San Francisco's freeway network, though most of the city's network is outside of the Downtown area. Similar to arterial speeds, freeway speeds increased noticeably during the pandemic. But unlike arterial speeds, freeway speeds have declined more sharply in recent years, and in the PM peak speeds have returned to pre-pandemic levels.

Transit Speeds

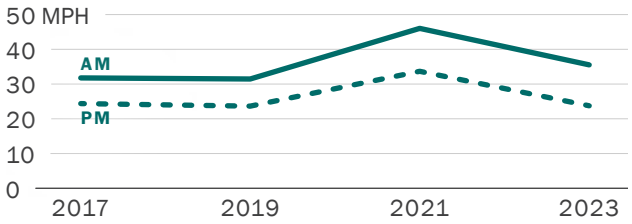
Transit (Muni bus) speeds in Downtown increased between 2019 and 2021, benefiting from reduced roadway congestion and faster roadway speeds, as well as transit priority strategies such as car-free Market Street and Muni Forward projects. The increase in speeds was particularly notable in the PM peak period, which is generally more congested than the AM peak. Since 2021, Downtown transit speeds have declined, though they remain faster than pre-pandemic speeds. Transit speeds in Downtown are consistently lower than transit speeds in the rest of San Francisco.

Figure 4-2. Weekday peak automobile speeds on CMP network **surface arterials** in Downtown and the rest of San Francisco, 2017 – 2023



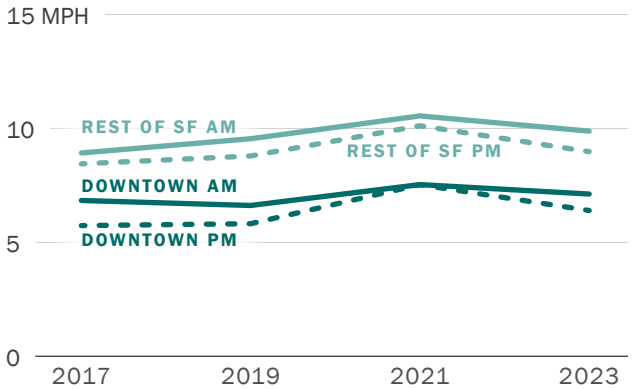
Source: INRIX and Transportation Authority, also cf. 2023 CMP report (sfcta.org/projects/congestion-management-program).
Download chart data (CSV)

Figure 4-3. Weekday peak automobile speeds on CMP network **freeways**, 2017 – 2023



Source: INRIX and Transportation Authority, also cf. 2023 CMP report (sfcta.org/projects/congestion-management-program).
Download chart data (CSV)

Figure 4-4. Weekday peak **Muni bus** speeds on CMP network **surface arterials** in Downtown and the rest of San Francisco, 2011 – 2023

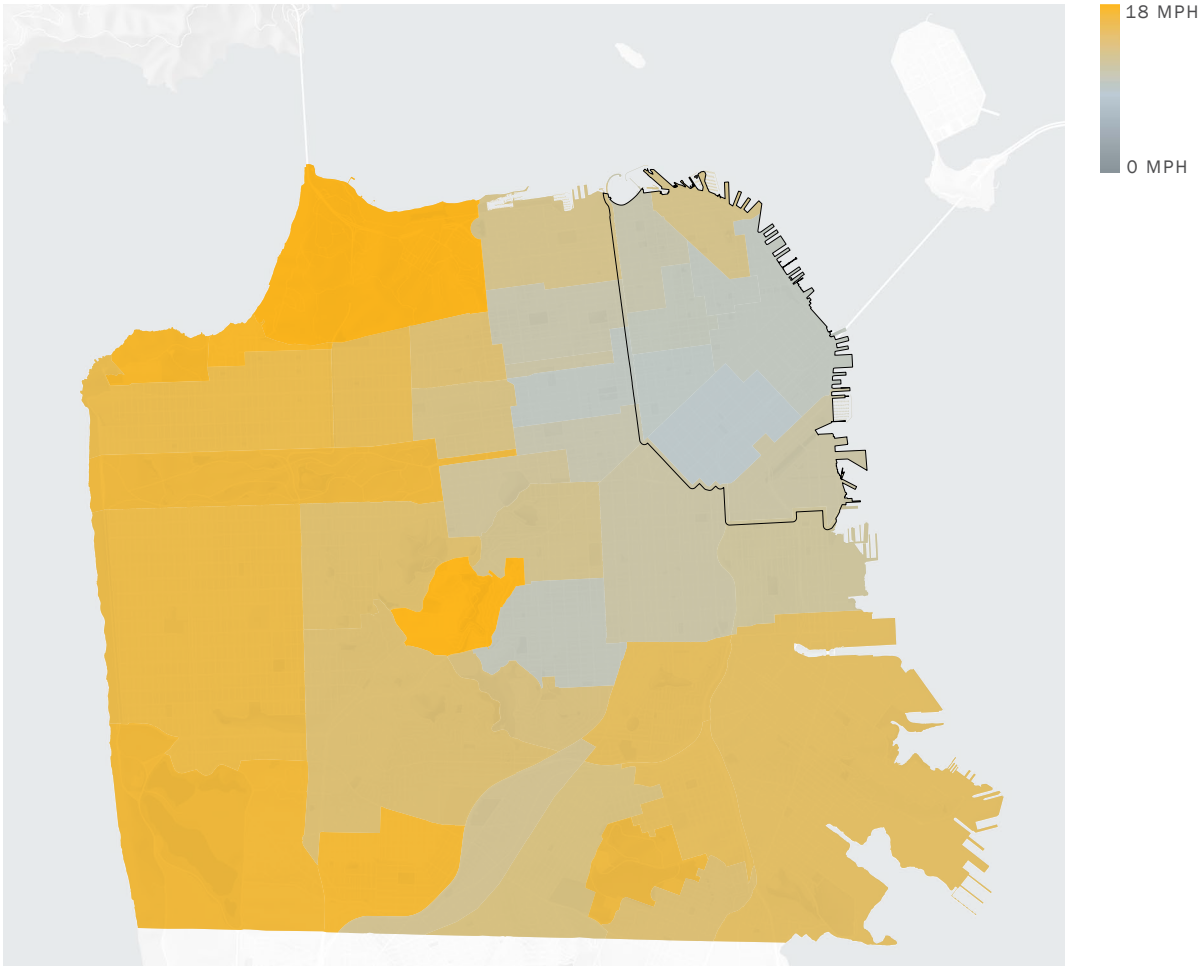


Source: SFMTA, also cf. 2023 CMP report (sfcta.org/projects/congestion-management-program).
Download chart data (CSV)

Roadway Speeds by Neighborhood

To complement the analysis of congestion on the CMP network, which is primarily focused in Downtown and a limited network of major arterials in the rest of San Francisco, we also compared automobile speeds on the Transportation Authority's expanded monitoring network,[9] which includes a broader range of major and minor arterials across all neighborhoods in San Francisco (other than Treasure Island). This analysis compares pre-pandemic (February/March 2020) and post-pandemic (February/March 2024) speeds. The grayer areas in Figure 4-5 show that prior to the pandemic, average PM peak speeds were clearly slower in the northeast quadrant (in an area larger than the Downtown core) of San Francisco.

Figure 4-5. Weekday PM peak automobile speeds on the CMP expanded network arterials by neighborhood, February/March 2020

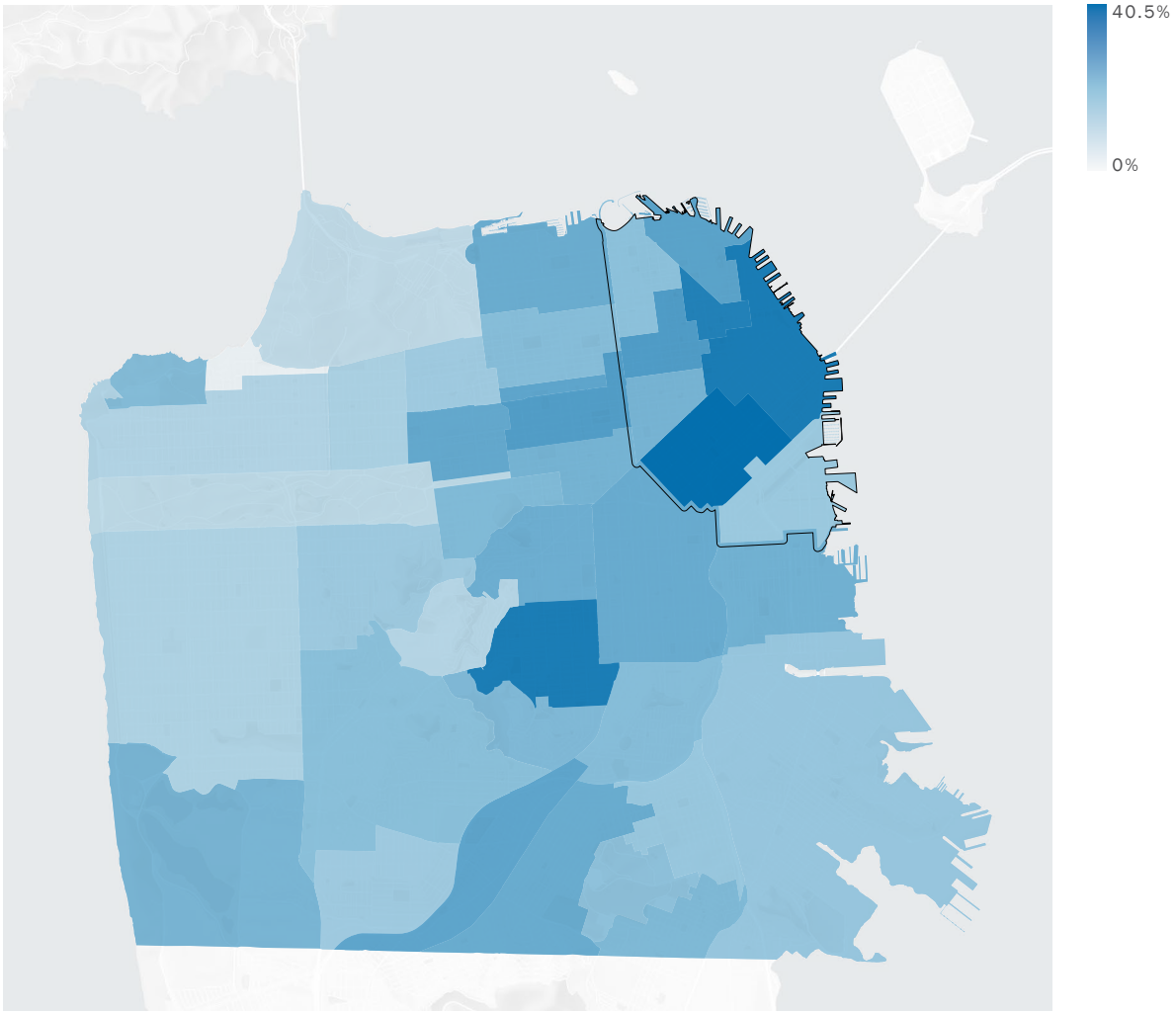


Source: INRIX, also cf. San Francisco Congestion Dashboard (congestion.sfcta.org).
Download map data (GeoPackage)

9 Transportation Authority San Francisco Congestion Dashboard, congestion.sfcta.org

Figure 4-6 shows the percentage change in speeds between this pre-pandemic condition and speeds in February/March 2024. In this map, darker colors show areas where speeds were faster compared to pre-pandemic speeds. Speeds were faster in 2024 than in 2020 across the entire city, but neighborhoods in the downtown northeast core in San Francisco in general had much larger speed increases, with the highest increases in South of Market (40%), Financial District / South Beach (37%), and Chinatown (36%). Noe Valley also experienced a significant increase in average speeds (37%).

Figure 4-6. Weekday PM peak percentage increase in automobile speeds on the CMP expanded network arterials by neighborhood, February/March 2020 – 2024



Source: INRIX, also cf. San Francisco Congestion Dashboard (congestion.sfcta.org).
Download map data (GeoPackage)

4.2 ROADWAY SCREENLINE VOLUMES

Screenlines are geographic "cut lines" that summarize traffic flows. The Transportation Authority typically uses three screenlines to document regional traffic flows in and out of San Francisco: the San Francisco-Oakland Bay Bridge, the Golden Gate Bridge, and the San Mateo county line.

San Francisco-Oakland Bay Bridge

Bay Bridge crossings rebounded to 9% below 2019 volumes and have been holding steady at this level for the past few years, after a 20% drop at the start of the pandemic.

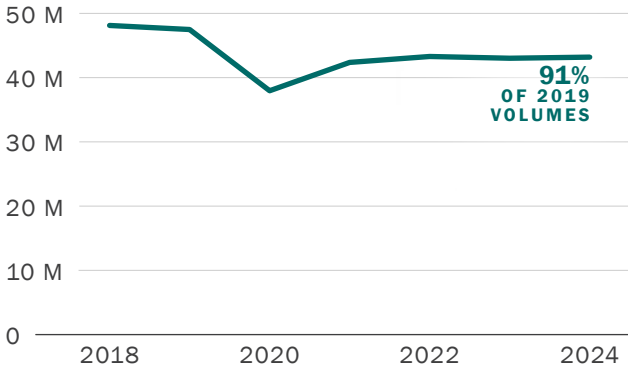
Golden Gate Bridge

In contrast, Golden Gate Bridge crossings dropped more significantly than Bay Bridge crossings – by 33% between the 2018/2019 and 2020/2021 fiscal years – and have not rebounded as much as Bay Bridge crossings, remaining at 16% below the 2018/2019 volumes, which is well below pre-pandemic levels. However, Golden Gate Bridge volumes are continuing to increase.

San Mateo County Line

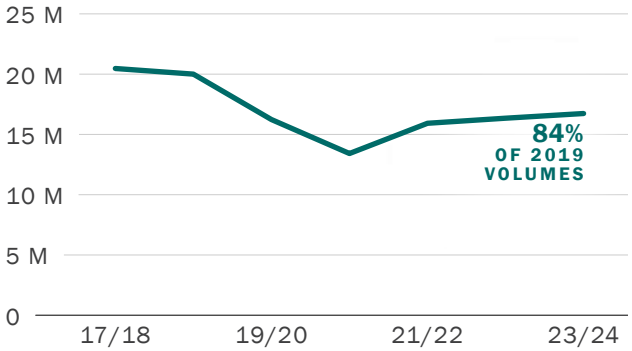
Peak period volumes on freeways crossing the San Francisco-San Mateo county line dropped by 50% between 2019 and 2020 at the start of the pandemic. These volumes have since fully recovered to and now slightly exceed 2019 volumes.

Figure 4-7. Annual **Bay Bridge** (westbound) toll crossings 2018 – 2023



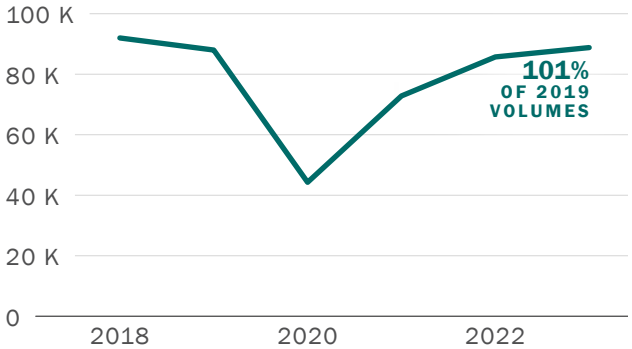
Source: Bay Area Toll Authority
Download chart data (CSV)

Figure 4-8. Annual **Golden Gate Bridge** (southbound) crossings, fiscal years (July – June) 2017/2018 – 2023/2024



Source: Golden Gate Highway & Transportation District
Download chart data (CSV)

Figure 4-9. Weekday Peak Period Average U.S. 101 and I-280 volumes at **San Mateo County Line** (sum of northbound and southbound)



Source: California Department of Transportation Performance Measurement System (PeMS), also cf. 2023 CMP report
Download chart data (CSV)

Vehicle Traffic Counts

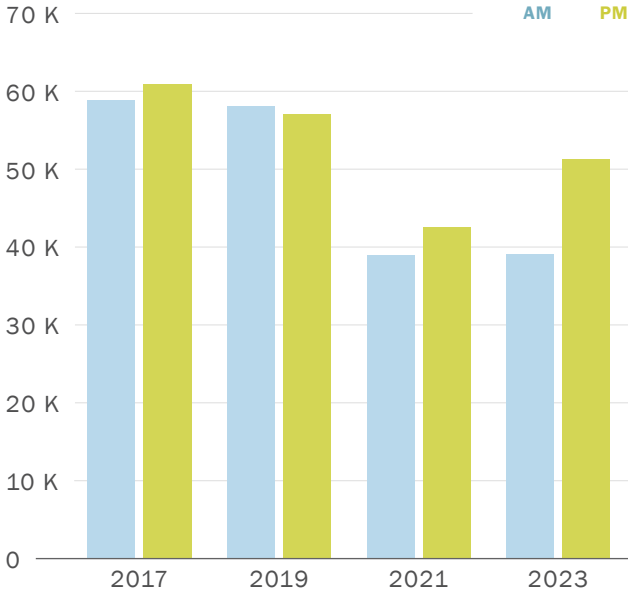
The Transportation Authority conducts vehicle counts at 29 mid-block locations[10] biennially as part of its Congestion Management Program over three continuous mid-week days (Tuesday to Thursday) in April/May. 21 of these locations are within Downtown.[11]

Neither daily nor AM/PM peak (7 to 9 a.m. / 4:30 to 6:30 p.m.) vehicle counts show a recovery back to pre-pandemic levels. The 2023 daily and PM peak vehicle counts stand at 85% to 90% of 2019 levels, with the trendlines suggesting that the ongoing vehicular traffic decrease observed from 2017 to 2019 is continuing in 2023. In contrast, the AM peak vehicle counts show a flat line between 2021 and 2023, with 2023 counts at 67% of 2019 levels.

Figure 4-10. Mid-Block Weekday Average Daily Traffic (ADT), 2017 – 2023

Download chart data (CSV)

Figure 4-11. Mid-Block Weekday Peak Traffic Counts, 2017 – 2023



Note: AM peak: 7 to 9 a.m. / PM peak: 4:30 to 6:30 p.m.
Download chart data (CSV)

10 Of the 29 mid-block locations, 16 are one-way streets and 13 are two-way streets.

11 Of these 21 mid-block locations in Downtown, 13 are one-way streets and 8 are two-way streets.

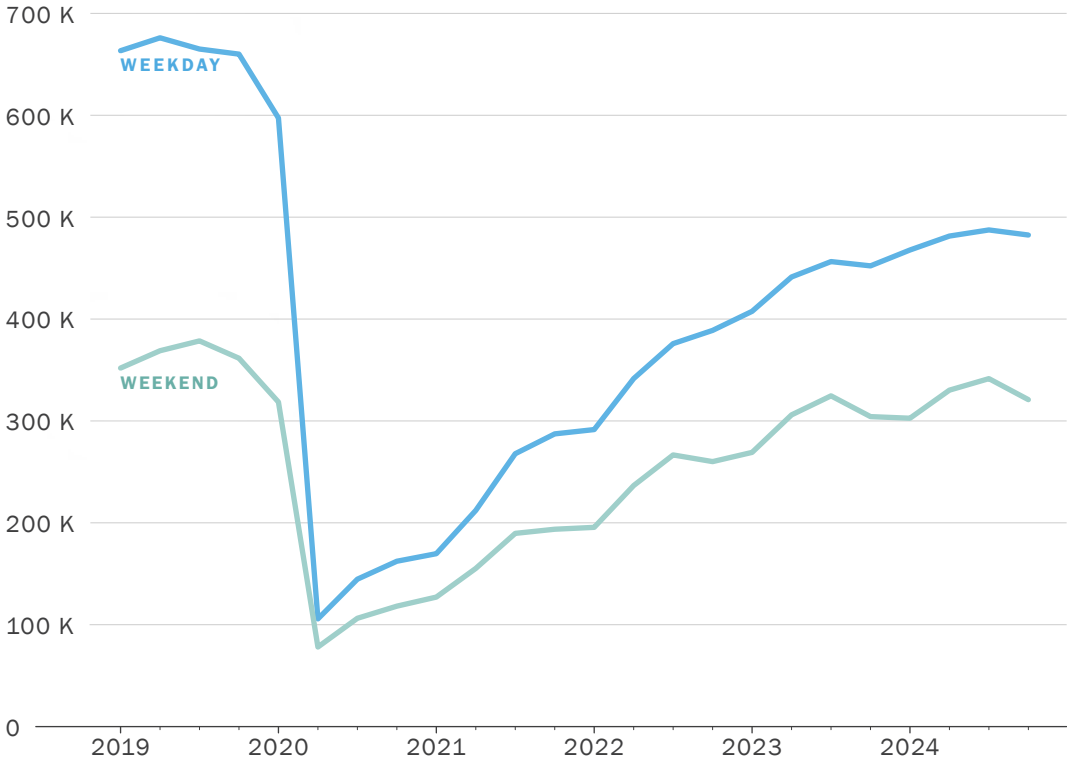
4.3 TRANSIT RIDERSHIP

Transit service is critical to ensuring San Francisco residents can access jobs, schools, and other destinations, and to supporting San Francisco's economy. Transit ridership is an indicator of the ability of local and regional transit service providers to meet San Francisco resident, student, and worker transportation needs. Transit ridership declined significantly during the pandemic, but ridership is continuing to recover in the past few years. In general, transit services and corridors that have received recent transit investments (such as the Caltrain Electrification project and Muni investments on the Mission, Van Ness, Stockton, and 16th Street corridors) see a more robust recovery in ridership numbers. This section summarizes recent trends in Muni, BART, and Caltrain ridership in Downtown, as well as in the rest of San Francisco.

Muni Weekday and Weekend Ridership Change

Overall Muni ridership dropped sharply at the beginning of the pandemic, due to shelter in place and restrictions on activities. Since then, Muni ridership has been steadily increasing, with ridership recovery being more robust on weekends than weekdays. By 2025 Q1, average Muni ridership (excluding cable cars and historic streetcars) had recovered to 74% of 2019 Q1 levels for weekdays and 92% for weekends.

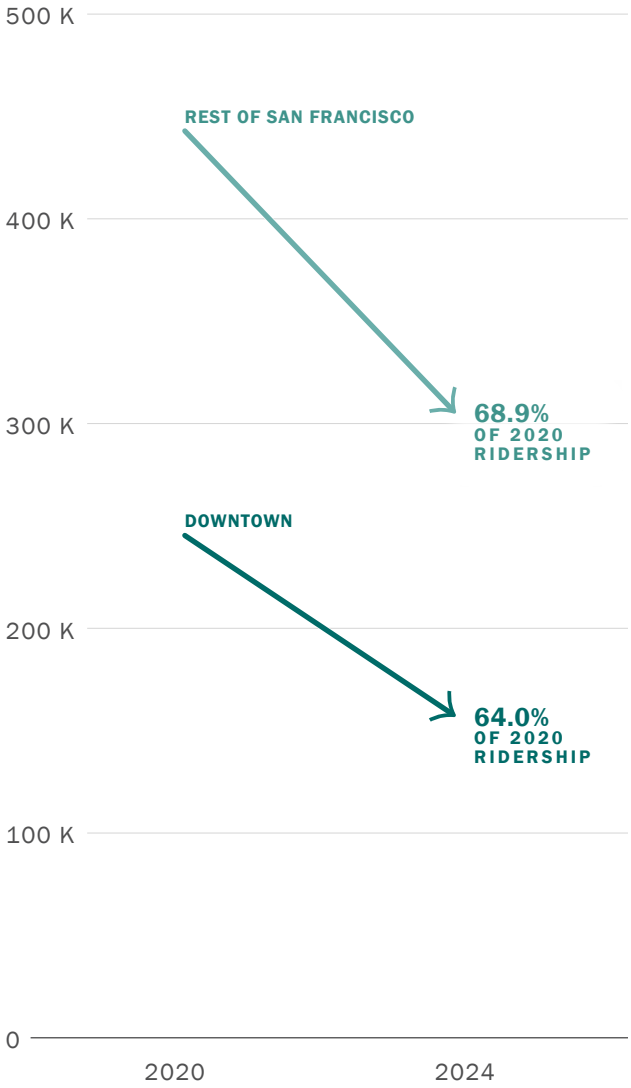
Figure 4-12. Muni weekday and weekend average daily boardings, 2019 – 2024 (quarterly)



Source: SFMTA
Note: Excludes cable car and historic streetcar ridership.
Download chart data (CSV)

Ridership declined in both Downtown and the rest of San Francisco for both weekends and weekdays between February 2020 (immediately before the pandemic) and February 2024. The decline was steeper on weekdays than on weekends, and also steeper within Downtown than outside. During this period, San Francisco Municipal Transportation Agency (SFMTA) reconfigured Muni service to provide more service along essential corridors and restructured or ceased service on some lines.

Figure 4-13. Weekday Muni ridership by geography, February 2020 vs. February 2024

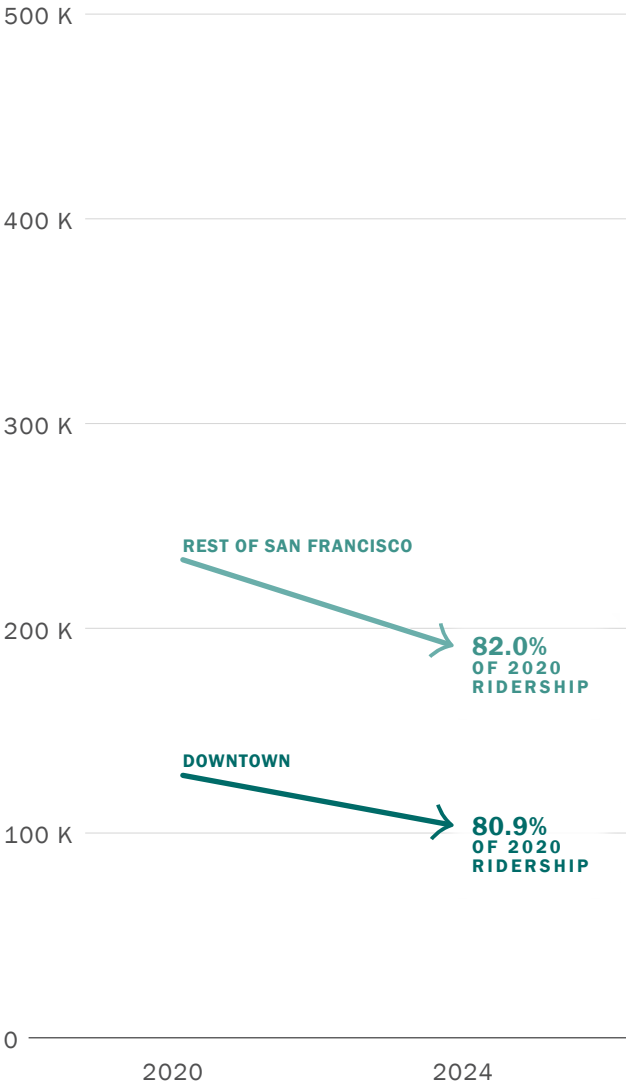


Source: SFMTA

Note: Excludes cable car and historic streetcar ridership.

Download chart data (CSV)

Figure 4-14. Weekend Muni ridership by geography, February 2020 vs. February 2024



Source: SFMTA

Note: Excludes cable car and historic streetcar ridership.

Download chart data (CSV)

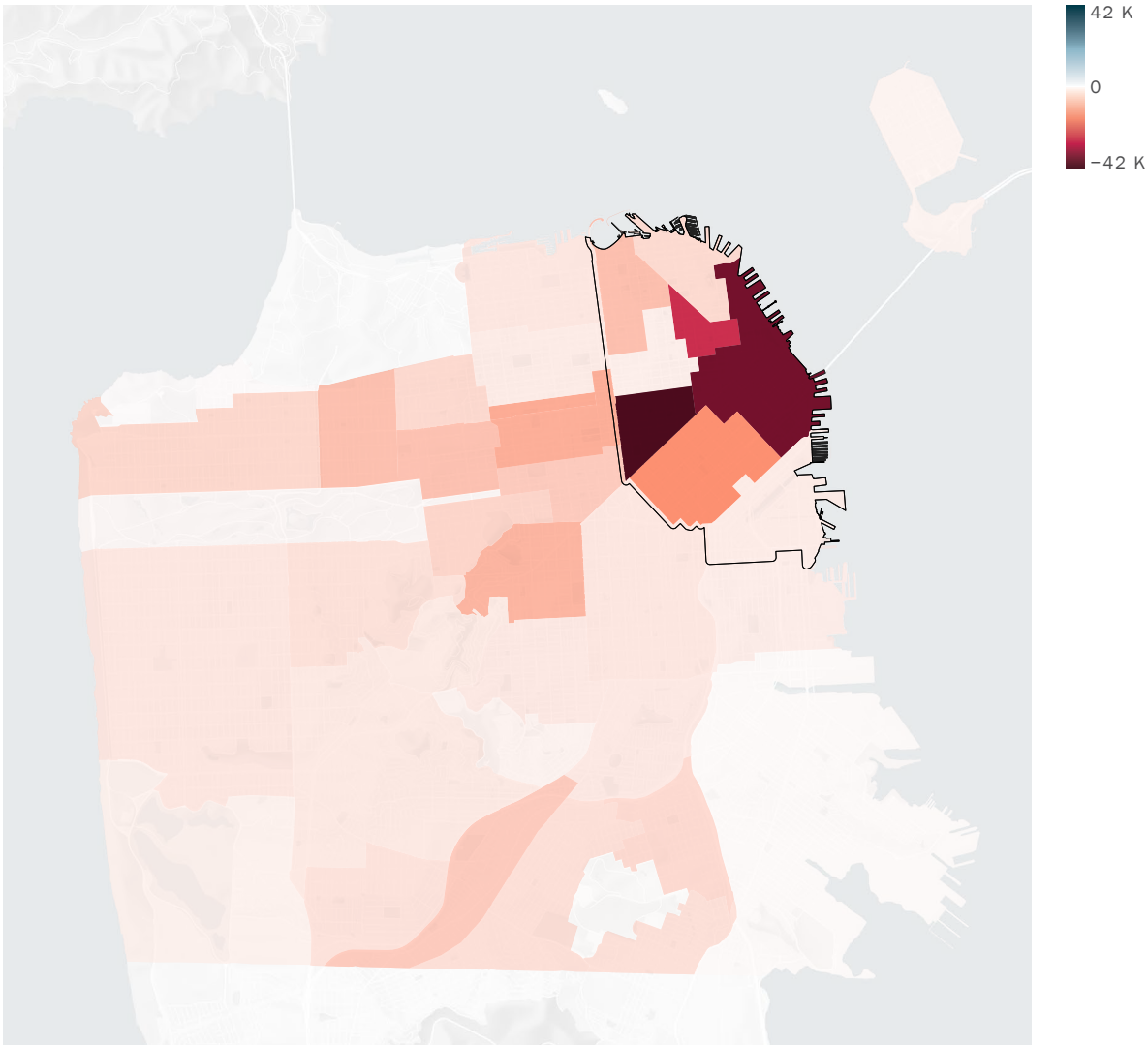
Muni ridership can be further examined by neighborhood and by nearest intersection.

Muni Ridership Change by Neighborhood

Weekdays

Muni experienced significant drops in weekday ridership in Downtown. In February 2024, there were 88,000 fewer Muni boardings in Downtown than there were in February 2020. These changes in ridership were most pronounced in the Tenderloin, Financial District / South Beach, and Chinatown.

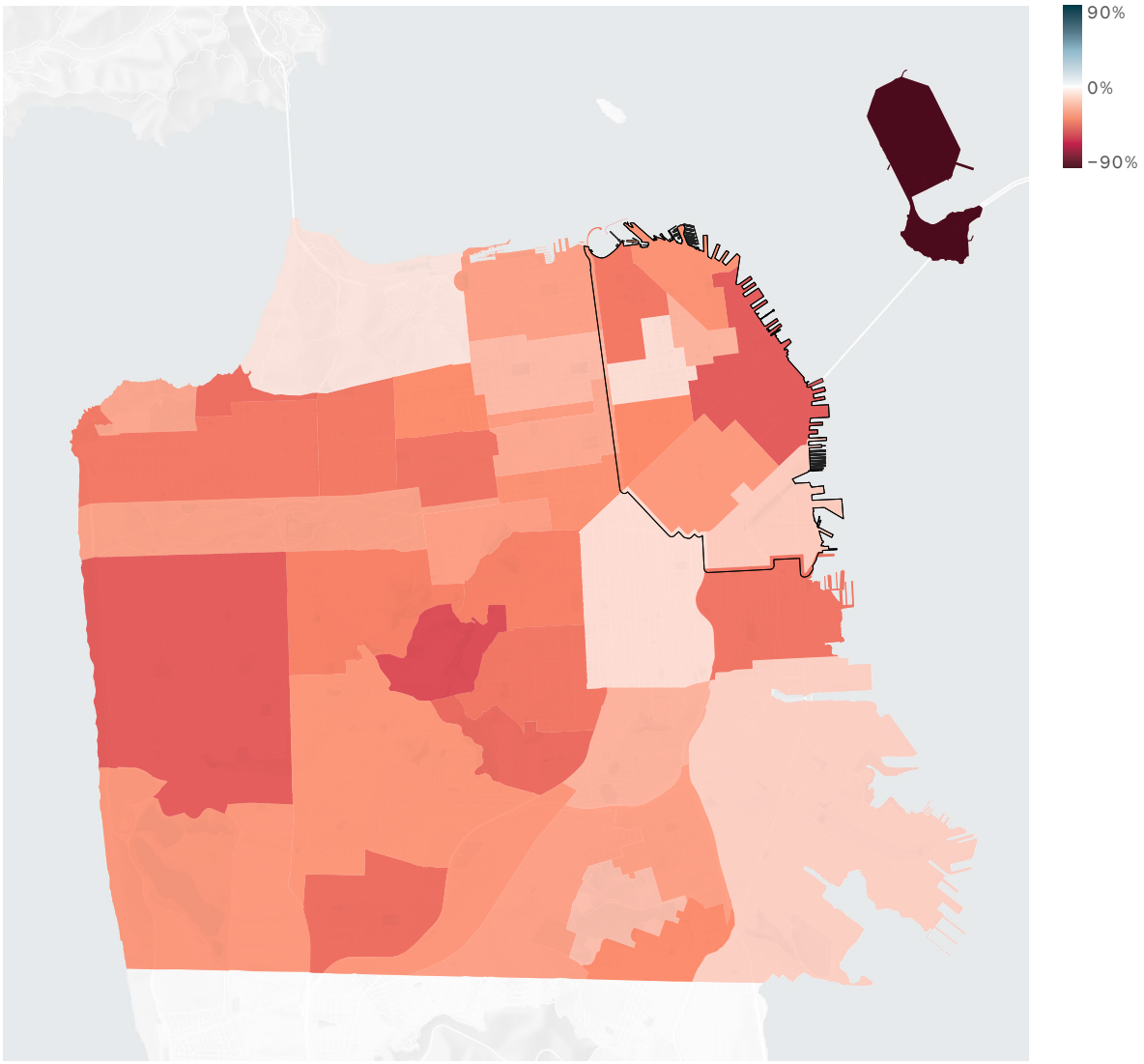
Figure 4-15. Difference in weekday Muni ridership per square mile between February 2020 and February 2024 by analysis neighborhood



Source: SFMTA
Note: Excludes cable car and historic streetcar ridership.
Download map data (GeoPackage)

While the relative change in Muni ridership (measured as the percent change in ridership) shows declines in ridership across the entire city, ridership in Eastern neighborhoods such as the Mission and Bayview Hunters Point appeared to be more resilient. Treasure Island showed a significant relative loss in ridership, though overall transit ridership to and from the island is low.

Figure 4-16. Percentage change in weekday Muni ridership per square mile between February 2020 and February 2024 by analysis neighborhood

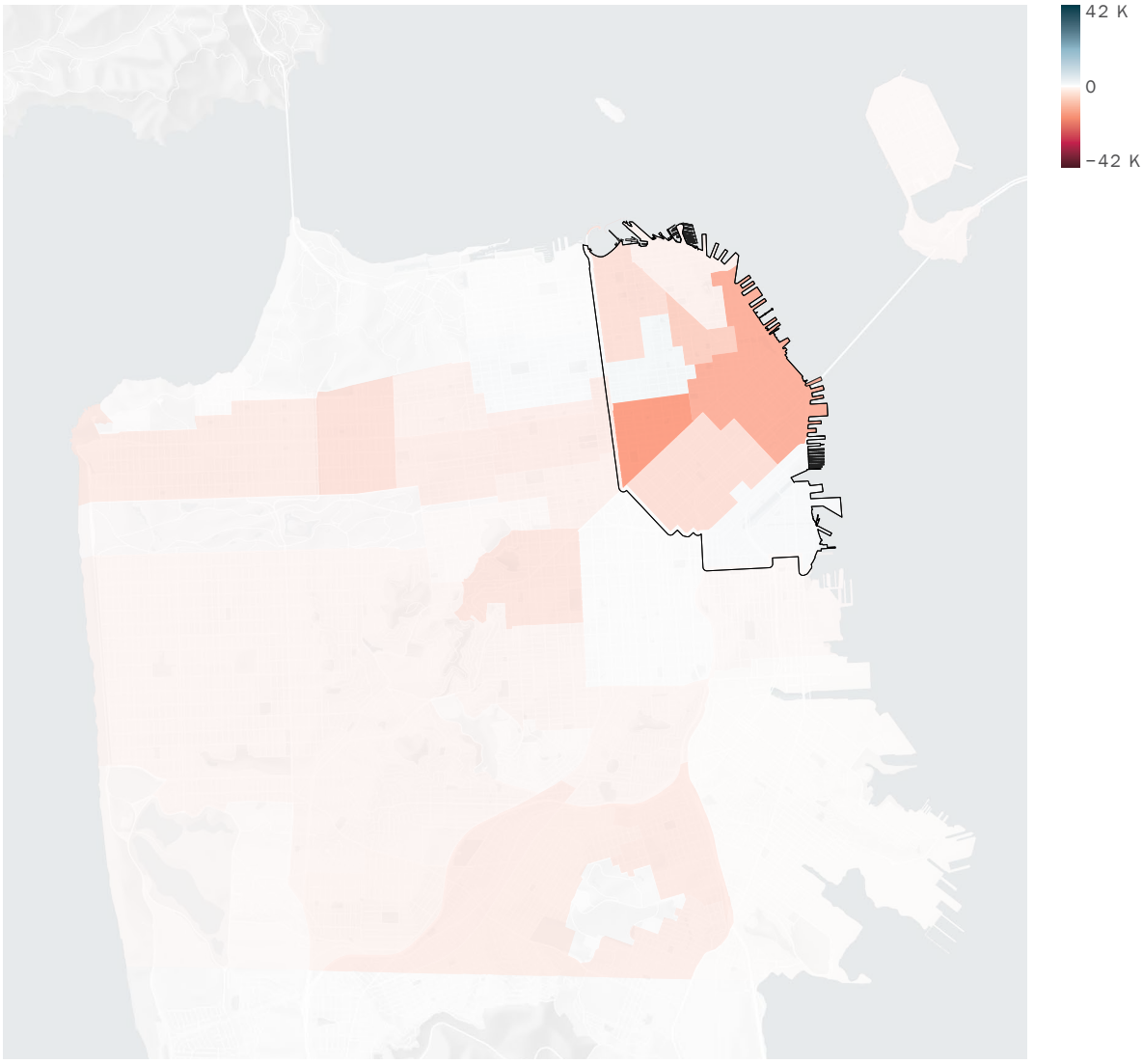


Source: SFMTA
Note: Excludes cable car and historic streetcar ridership.
Download map data (GeoPackage)

Weekends

Muni also experienced weekend ridership declines in Downtown though these changes were not as pronounced as the weekday ridership declines. In February 2024, there were 24,000 fewer Muni boardings in Downtown than there were in February 2020. These changes in ridership were most pronounced in the Tenderloin and the Financial District / South Beach.

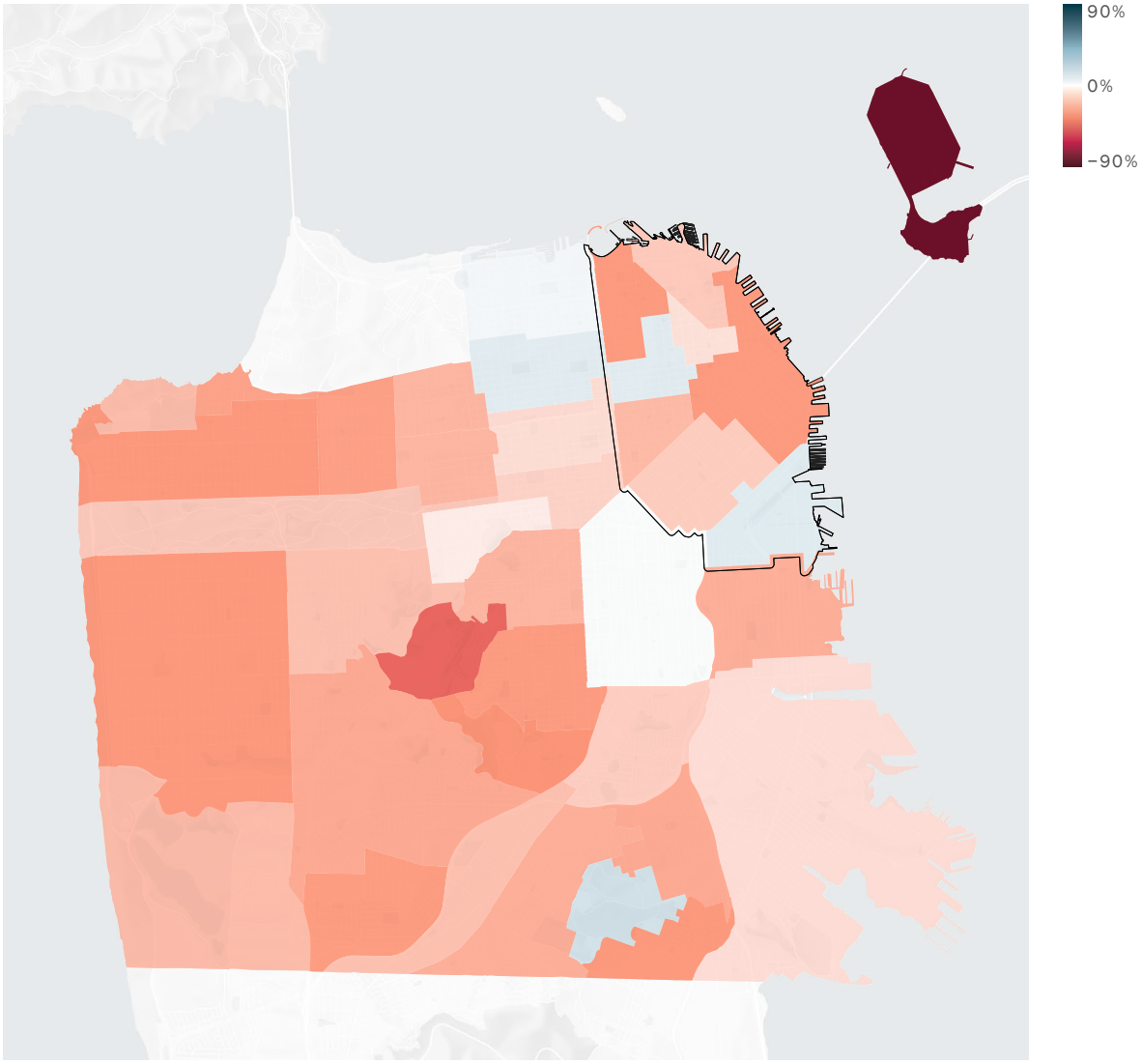
Figure 4-17. Difference in weekend Muni ridership per square mile between February 2020 and February 2024 by analysis neighborhood



Source: SFMTA
Note: Excludes cable car and historic streetcar ridership.
Download map data (GeoPackage)

The relative change in weekend Muni ridership shows a similar, though less pronounced, pattern as observed for weekdays. The relative declines in Downtown were smaller than in the western neighborhoods, and many eastern and northern neighborhoods demonstrated resilient or even increased weekend transit ridership.

Figure 4-18. Percentage change in weekend Muni ridership per square mile between February 2020 and February 2024 by analysis neighborhood



Source: SFMTA
Note: Excludes cable car and historic streetcar ridership.
Download map data (GeoPackage)

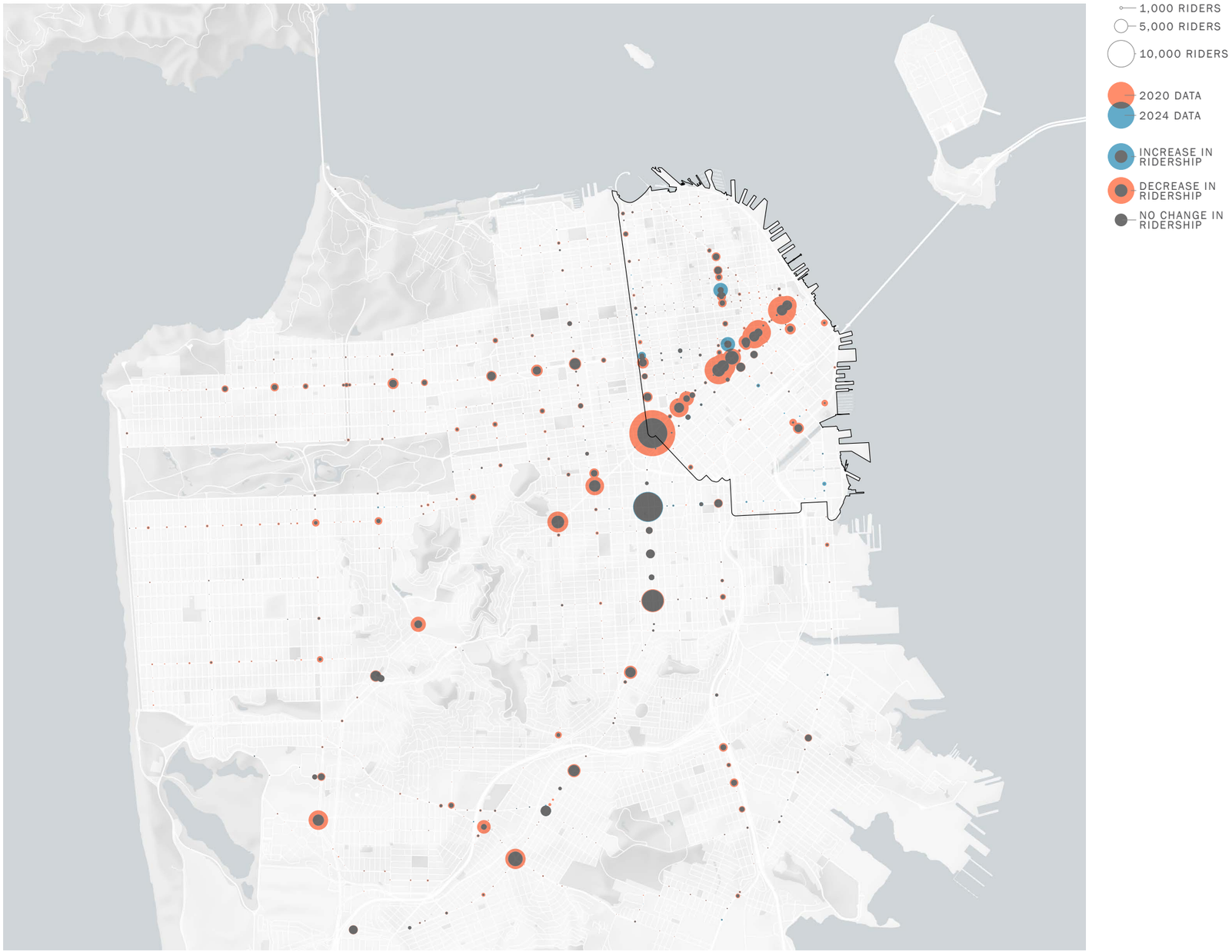
Muni Ridership Change by Nearest Intersection

Muni ridership can also be analyzed by the closest street intersection. In the following series of maps, red circles show where Muni ridership has declined, blue circles show where Muni ridership has increased, and gray circles show where Muni ridership is unchanged. The size of the circle corresponds to the magnitude of the ridership and/or ridership change.

Weekdays

Weekday Muni ridership has declined most noticeably along the Market Street corridor, primarily due to changes in Muni Metro ridership, though Market Street bus ridership is also lower. The Geary, San Bruno, and Geneva corridors also show declines in ridership. However, other corridors show ridership resilience, such as Mission, Van Ness, Stockton, and 16th Street – all of which have benefited from recent transit investments.

Figure 4-19. Weekday Muni ridership by intersection for February 2020 and February 2024



Source: SFMTA

Note:

Excludes cable car and historic streetcar ridership.

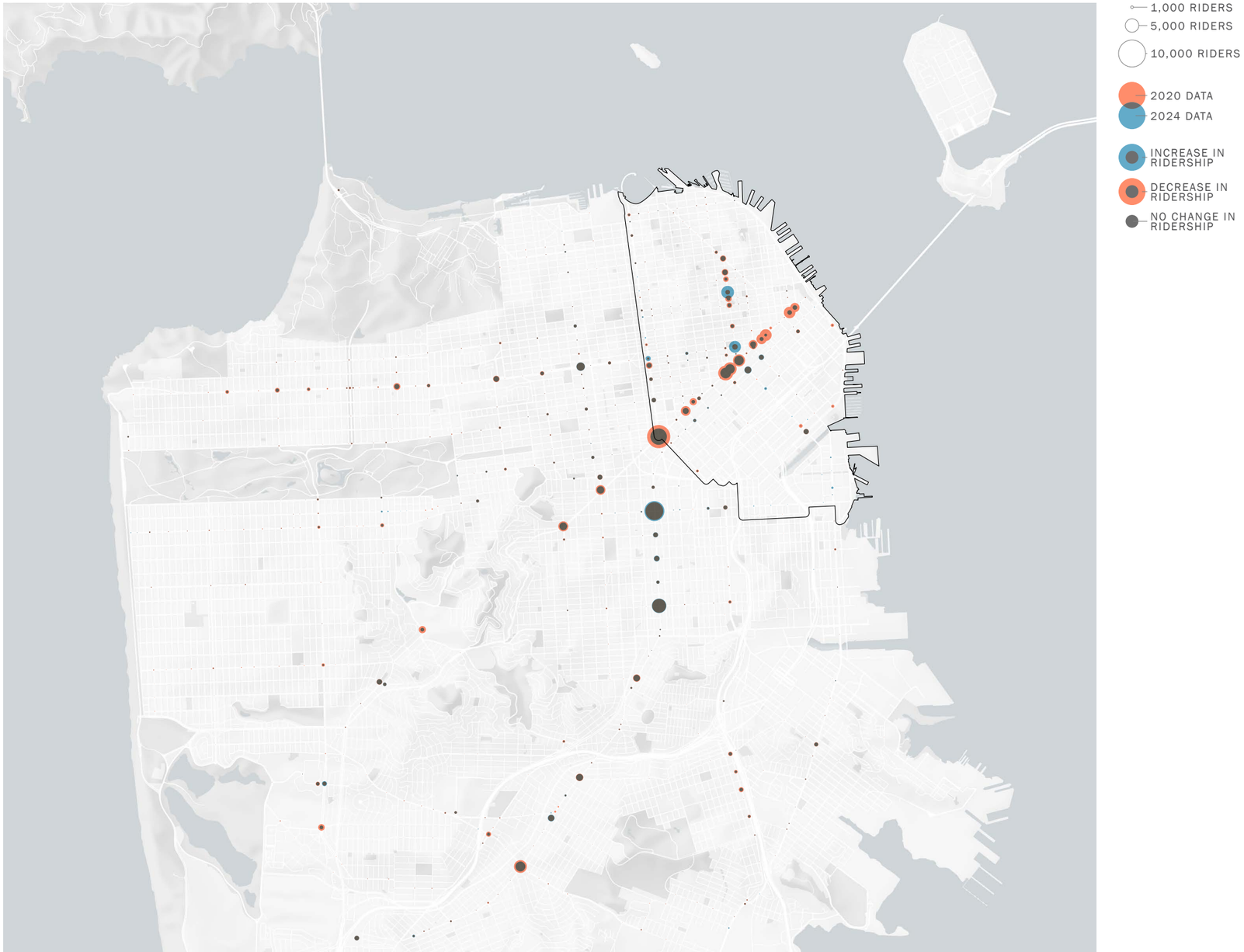
The 2020 ridership is shown in red, and 2024 ridership in blue, with overlap appearing as gray. Where ridership has increased from 2020 to 2024, the inner gray circle shows 2020 ridership and the outer blue circle shows 2024 ridership. Where ridership has fallen from 2020 to 2024, the inner gray circle shows 2024 ridership and the outer red circle shows 2020 ridership. A perfectly gray circle indicates no change in ridership from 2020 to 2024.

Download map data (GeoPackage)

Weekends

Weekend Muni ridership has also declined most noticeably along the Market Street corridor. However, weekend ridership on other corridors such as Geary appears to be more resilient than on weekdays, perhaps reflective of the fact that weekend ridership is less impacted by changes in commuting patterns. Weekend ridership losses are more limited than weekdays, and there are even increases along the Stockton / Central Subway corridor.

Figure 4-20. Weekend Muni ridership by intersection for February 2020 and February 2024



Source: SFMTA

Note:

Excludes cable car and historic streetcar ridership.

The 2020 ridership is shown in red, and 2024 ridership in blue, with overlap appearing as gray. Where ridership has increased from 2020 to 2024, the inner gray circle shows 2020 ridership and the outer blue circle shows 2024 ridership. Where ridership has fallen from 2020 to 2024, the inner gray circle shows 2024 ridership and the outer red circle shows 2020 ridership. A perfectly gray circle indicates no change in ridership from 2020 to 2024.

Download map data (GeoPackage)

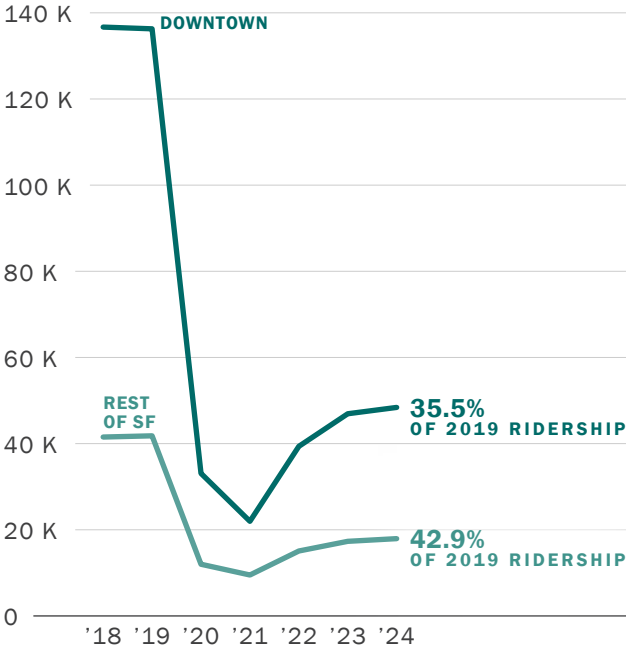
BART San Francisco Weekday and Weekend Ridership Change

BART ridership declined sharply with the start of the pandemic both at the core Downtown (Market Street) stations, as well as at stations in San Francisco outside the core. BART ridership has been increasing steadily since 2021, largely tracking with return to work trends[12], but remains well below pre-pandemic levels. Systemwide, BART ridership has recovered to 42% of 2019 Q1 ridership by 2025 Q1.

Since the pandemic began, BART has implemented numerous service changes to adapt to changing conditions. In September 2023, BART increased night and weekend frequencies to ensure a maximum wait time of 20 minutes, increased service to San Francisco International Airport, began operating only new train cars, and reduced the length of less crowded trains to improve safety and optimize resource utilization. BART has also focused on responding to customer feedback, especially related to safety and cleanliness, to win back ridership.

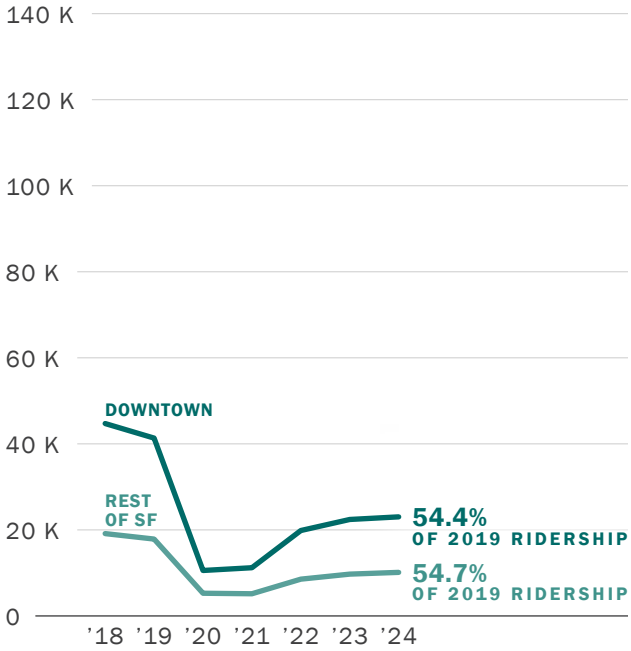
Ridership recovery is more robust on weekends than weekdays and outside the Downtown core of San Francisco than within.

Figure 4-21. Weekday BART ridership by Market Street stations and stations in the rest of San Francisco, 2018 – 2024



Source: BART ridership reports bart.gov/about/reports/ridership
Download chart data (CSV)

Figure 4-22. Weekend BART ridership by Market Street stations and stations in the rest of San Francisco, 2018 – 2024



Source: BART ridership reports bart.gov/about/reports/ridership
Download chart data (CSV)

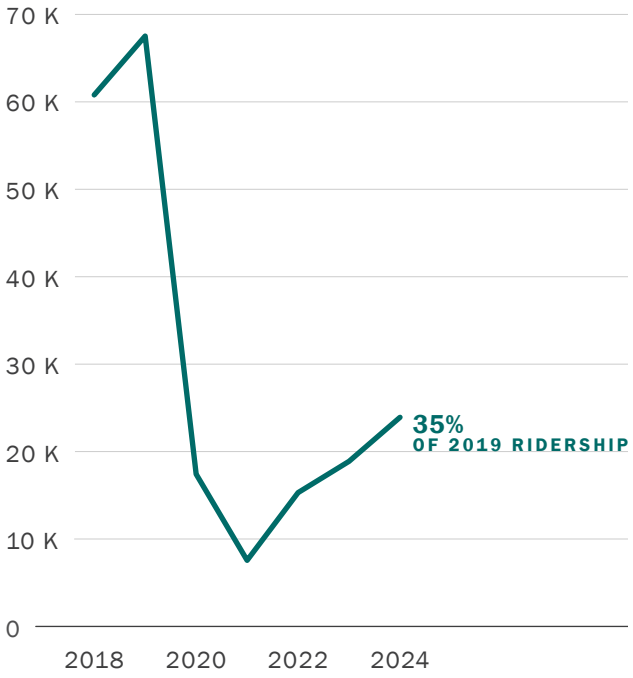
12 BART, BART: Facing the fiscal cliff. (Presentation to Transportation Authority Board on March 25, 2025) sfcta.org/sites/default/files/2025-03/SFCTA_Board_Item11_BARTFinancialOutlookRegionalTransportationMeasurePRESENTATION_2025-03-25.pdf

Caltrain Weekday Ridership Change

Of the regional transit operators serving San Francisco, Caltrain was most impacted by the pandemic. Caltrain ridership decreased both at stations within San Francisco and throughout the rest of the system. By 2024, Caltrain had recovered to 35% of pre-pandemic ridership, and recent Caltrain statements have indicated continued growth. The Caltrain Electrification project, recently completed in September 2024, continues to boost ridership as riders get acquainted with the faster and more frequent service that Caltrain now provides. Caltrain reports that since the commencement of electrified service, weekday ridership continues to reach new post-pandemic highs: ridership has increased by 37% year-on-year in the first seven months[13] of electrified service. In March 2025, it reached 32,400, approximately half of pre-pandemic ridership.

The largest declines in San Francisco Caltrain ridership, in both absolute and relative terms, occurred at 4th & King, which in 2024 was at 27% of 2019 ridership levels. Combined, the ridership at the 22nd Street and Bayshore stations was at 39% of 2019 ridership levels and overall Caltrain system ridership stood at 34% of 2019 ridership levels.

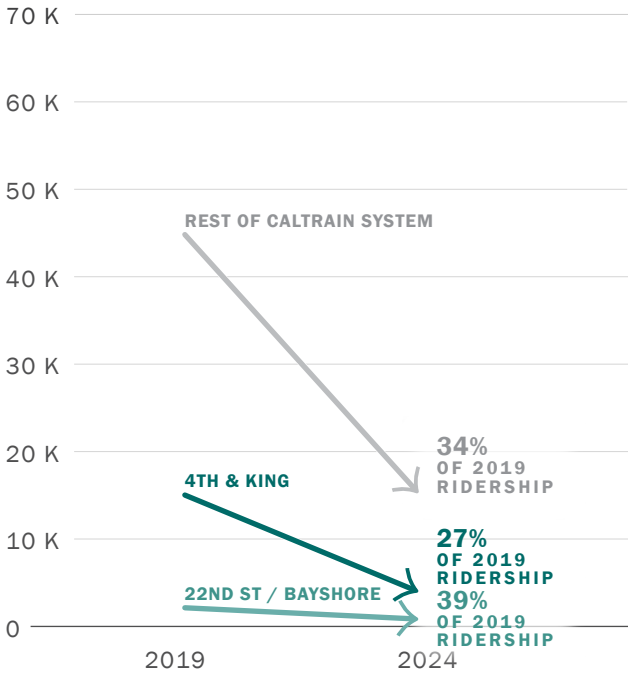
Figure 4-23. Caltrain full system average weekday boardings, 2018 – 2024



Source: Caltrain

Download chart data (CSV)

Figure 4-24. Caltrain average weekday boardings by geography, 2019 – 2024



Source: Caltrain

Note: 2019 data is from the annual passenger count, conducted in January/February timeframe on a Tuesday, Wednesday, Thursday. 2024 data is from fare media sales-based ridership estimates, averaged over Monday to Friday in January and February.

Download chart data (CSV)

13 September 2024 – March 2025, compared to the same seven months one year prior.

5. Population & Demographics

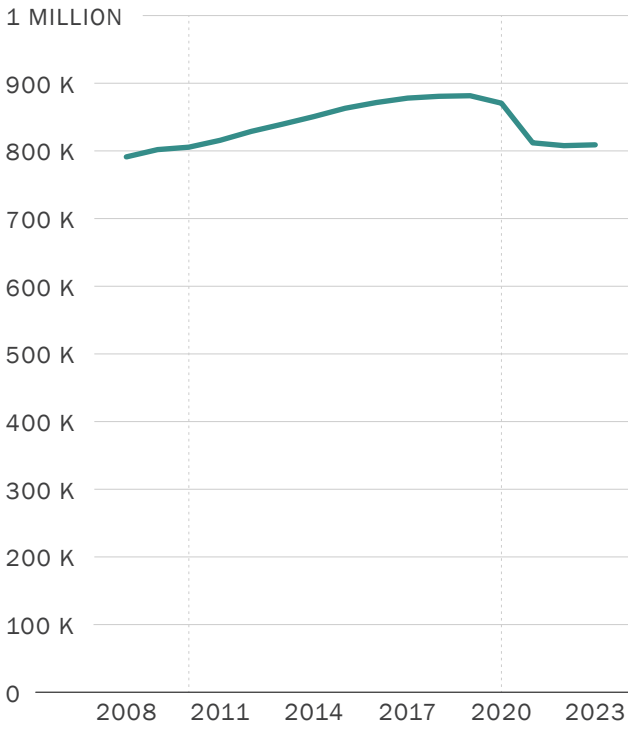
The preceding sections of this report document overall changes in travel trends and in transportation system performance during the past five years. Some of these changes are in part the product of demographic and economic factors, which is presented in the next two sections of the report.

5.1 POPULATION

San Francisco's population increased significantly from 791,000 in 2008 to a pre-pandemic peak of 882,000 in 2019. The city's population growth started to slow around 2017, and with the pandemic, San Francisco's population dropped 8% to 808,000 in 2022 before recovering slightly to 809,000 in 2023.

The population in San Francisco has stabilized at around 8% lower than its pre-pandemic level, whereas the population decline in the same period was only 3% for the Bay Area as a whole.

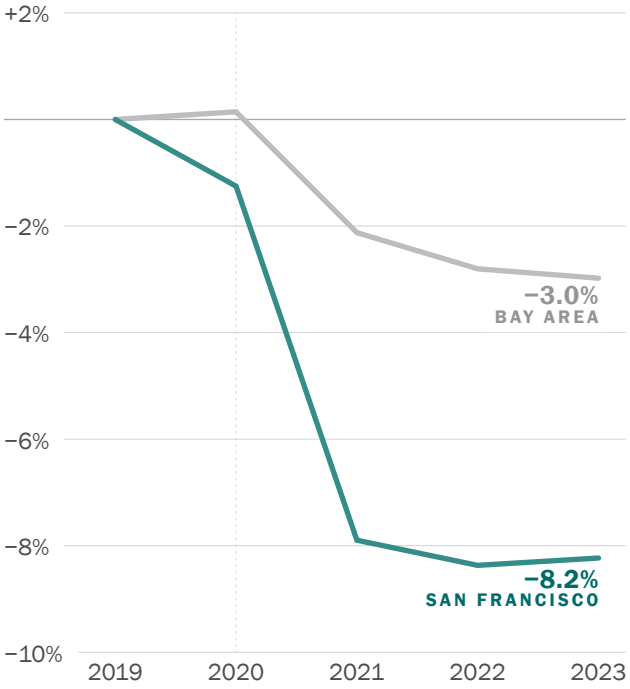
Figure 5-1. Population in San Francisco, 2008 – 2023



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.

Download chart data (CSV)

Figure 5-2. 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.

Download chart data (CSV)

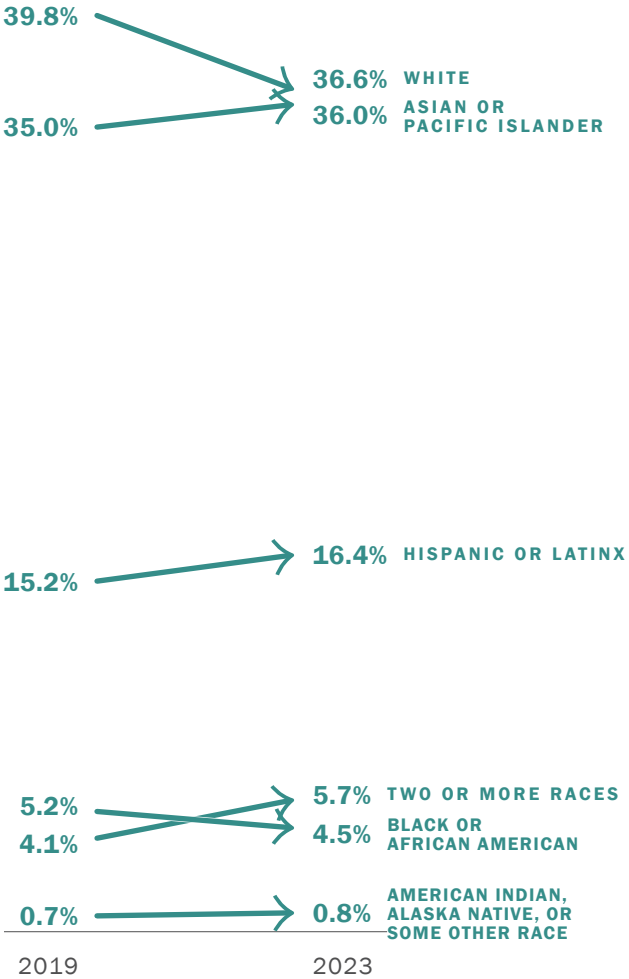
Note: The U.S. Census Bureau cautions that data from separate vintages (i.e., 2000 – 2009, 2010 – 2019, 2020 – 2029) should not be combined. Thus, one should not directly compare data between each decade.

5.2 RACE & ETHNICITY

In San Francisco between 2019 and 2023, the share of the population that identifies as White had the largest change, declining from 40% to 37%. The share of the population that identifies as Black also decreased. In contrast, the shares of people identifying as Asian / Pacific Islander, Hispanic/Latinx, or two or more races increased.

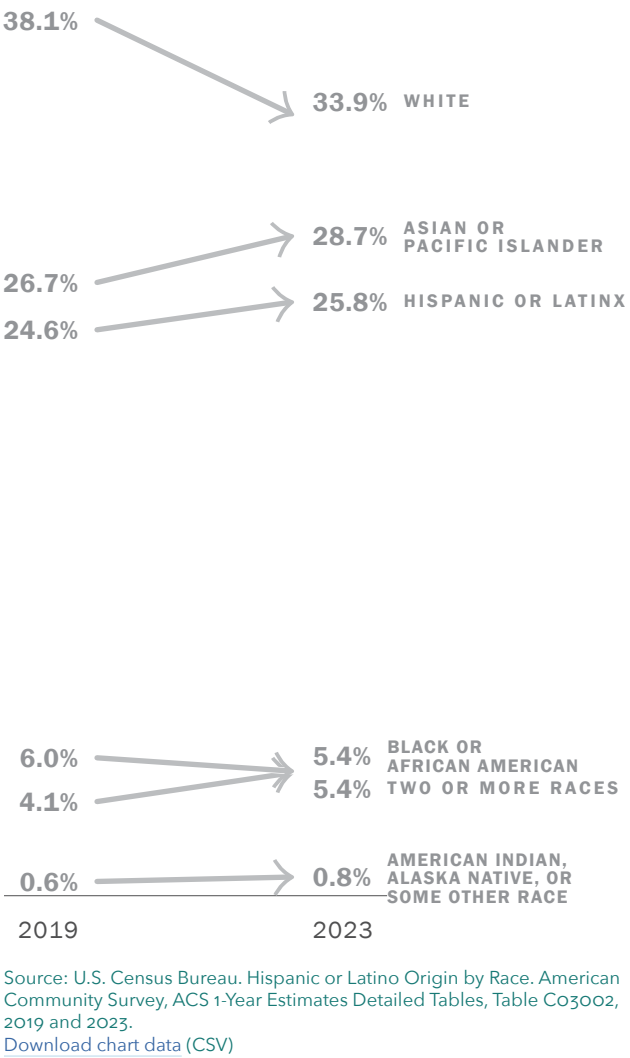
These San Francisco trends were all mirrored in the Bay Area, though regionally Hispanic or Latinx people comprise a relatively greater share of the regional population, while Asian or Pacific Islander and White races comprise a relatively smaller share of the regional population.

Figure 5-3. 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.
Download chart data (CSV)

Figure 5-4. Bay Area resident race/ethnicity shares, 2019 – 2023



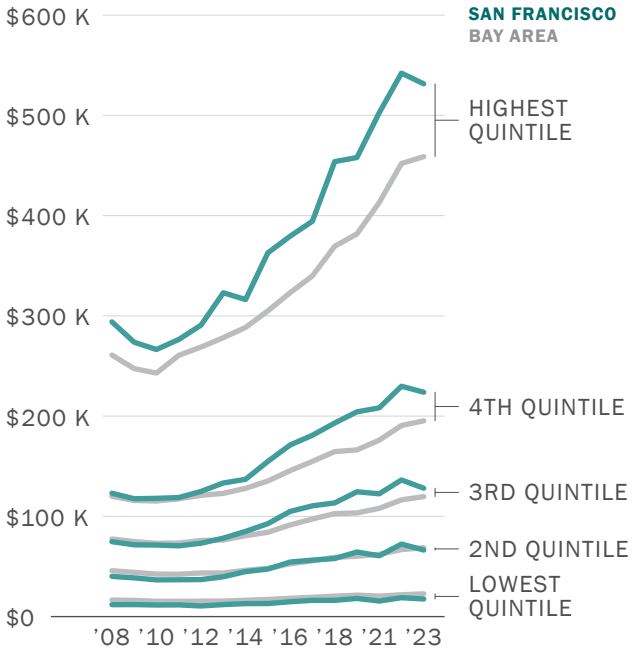
Source: U.S. Census Bureau. Hispanic or Latino Origin by Race. American Community Survey, ACS 1-Year Estimates Detailed Tables, Table C03002, 2019 and 2023.
Download chart data (CSV)

5.3 INCOME

Since the Great Recession in the late 2000s, incomes in San Francisco and the region have in general been rising in nominal terms. Figure 5-5 illustrates mean household income by quintile between 2008 and 2023. Each quintile represents 20% of total households. The San Francisco and regional income growth for the three highest household income quintiles has been stronger over the last 15 years than for the two lowest household income quintiles. As a result, in both San Francisco and the region, the household income gap between higher income households and lower income households has widened between 2019 and 2023.

Looking more narrowly at changes in San Francisco household incomes since 2019 suggests that the incomes of households just in the lowest income quintile were actually lower in 2023 than in 2019, even without accounting for inflation.

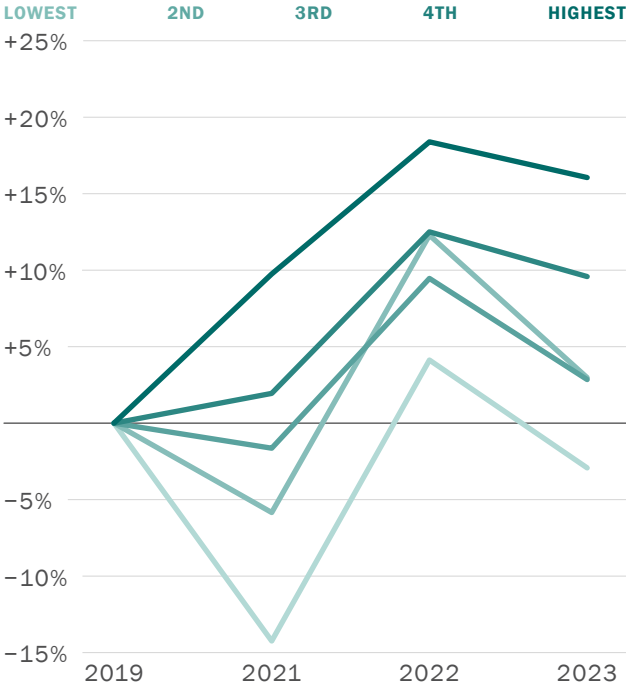
Figure 5-5. Mean household income in each quintile for San Francisco and the San Jose-San Francisco-Oakland Combined Statistical Area



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

Download chart data (CSV)

Figure 5-6. Percentage change in mean household income in each quintile for San Francisco, 2019 – 2023



Source: U.S. Census Bureau ACS 1-Year Estimates Detailed Tables, Table B19081, 2019 – 2023

Note: The U.S. Census did not release ACS 1-year estimates for 2020 due to pandemic impacts (U.S. Census Bureau. 2020 ACS 1-year Estimates. census.gov/programs-surveys/acs/technical-documentation/table-and-geography-changes/2020/1-year.html).

Download chart data (CSV)

6. Economy & Employment

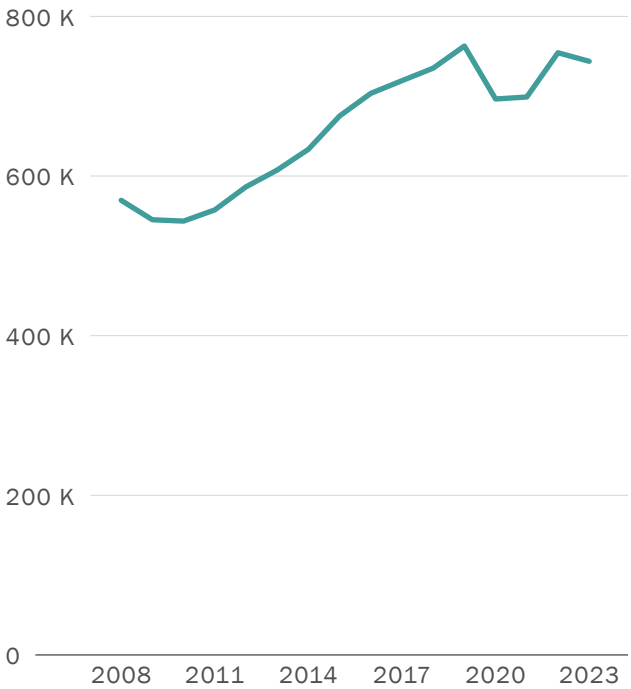
The COVID-19 pandemic caused profound changes in employment and work patterns in San Francisco and the Bay Area which, along with population and demographic changes, contributed to the changes in travel trends and in transportation system performance documented in this report. The San Francisco data presented here is at a citywide level because Downtown specific information is not yet available.

6.1 TOTAL EMPLOYMENT

In the ten years preceding the pandemic, San Francisco employment grew rapidly, from 540,000 jobs in 2010 to a peak of 763,000 jobs in 2019, before dropping during the pandemic. By 2023, employment in San Francisco returned to near historical highs at 2.5% below 2019 levels.

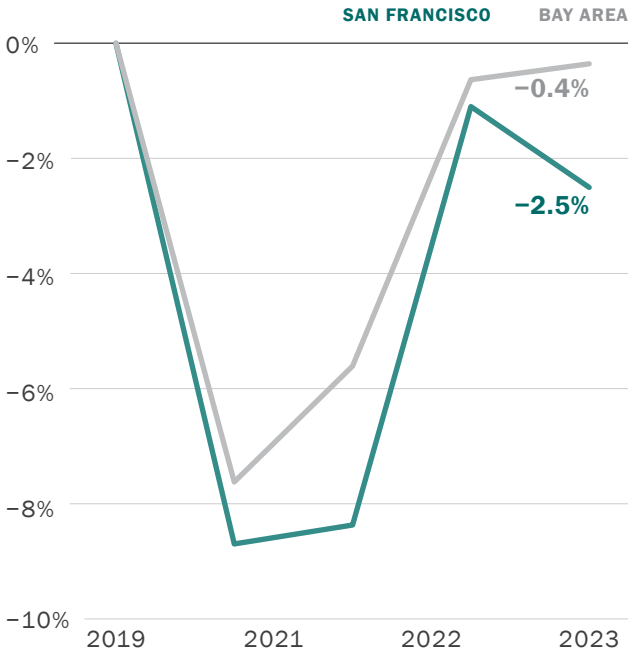
The decline in San Francisco employment was mirrored in the Bay Area overall, though the percentage decrease in employment between 2019 and 2020 was larger in San Francisco (8.7%) than in the Bay Area (7.6%), and the recovery in San Francisco since 2020 has also been slower.

Figure 6-1. Total employment by workplace in San Francisco, 2008 – 2023



Source: California Employment Development Department. Current Employment Statistics.
Download chart data (CSV)

Figure 6-2. Percentage change in total employment by workplace in San Francisco and the Bay Area, 2019 – 2023

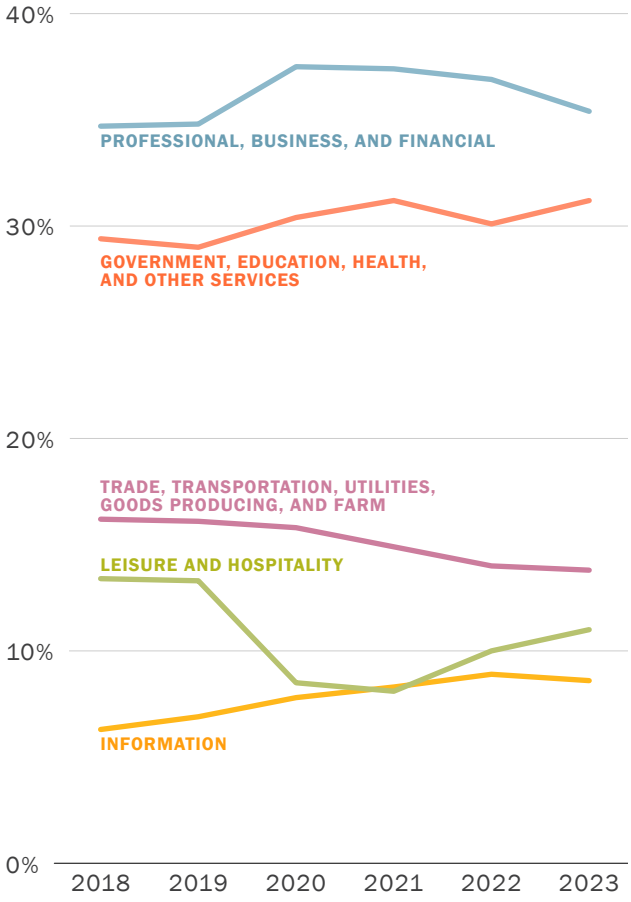


Source: California Employment Development Department. Current Employment Statistics.
Download chart data (CSV)

6.2 EMPLOYMENT BY SECTOR

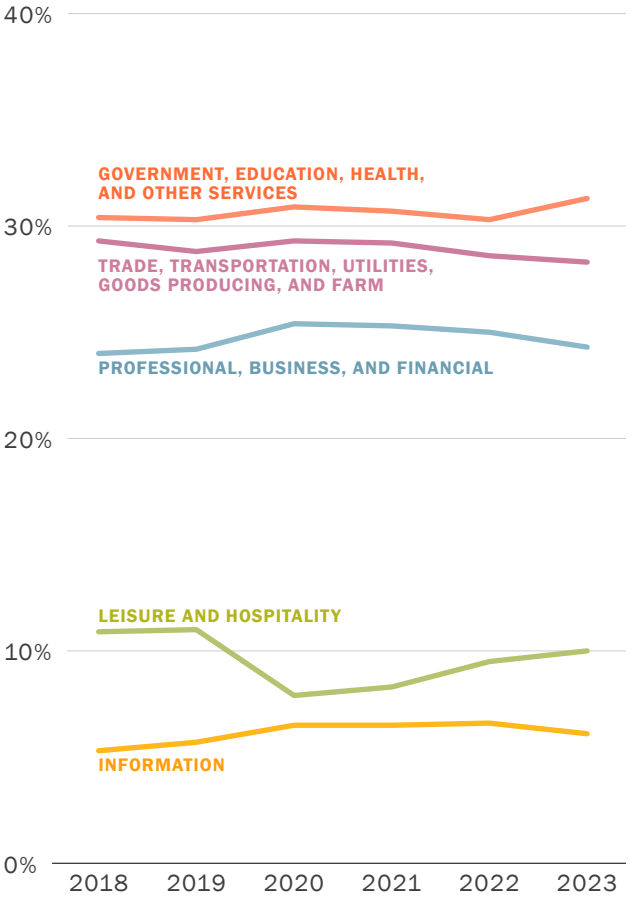
In addition to changes in total employment in San Francisco, the city has also experienced changes in the employment by industry sector groups. In San Francisco, Professional, Business, and Financial Services has remained the largest industry sector, followed by Government, Education, Health, and Other Services. Trade, Transportation, Utilities, Goods Producing, and Farm employment shares have been steadily declining in San Francisco since before the pandemic, while the Information employment shares have been steadily increasing. Unsurprisingly, given travel and other restrictions, the Leisure and Hospitality industry – an industry heavily concentrated in Downtown San Francisco – was the most impacted by the pandemic. While the share of Leisure and Hospitality employment has not returned to pre-pandemic levels, it has been consistently recovering. Similar industry sector trends can be observed for the larger Bay Area, though the industry composition of San Francisco employment is quite different from the industry composition of the Bay Area overall.

Figure 6-3. San Francisco employment industry shares by workplace, 2018 – 2023



Source: California Employment Development Department. Current Employment Statistics.
Download chart data (CSV)

Figure 6-4. Bay Area employment industry shares by workplace, 2018 – 2023

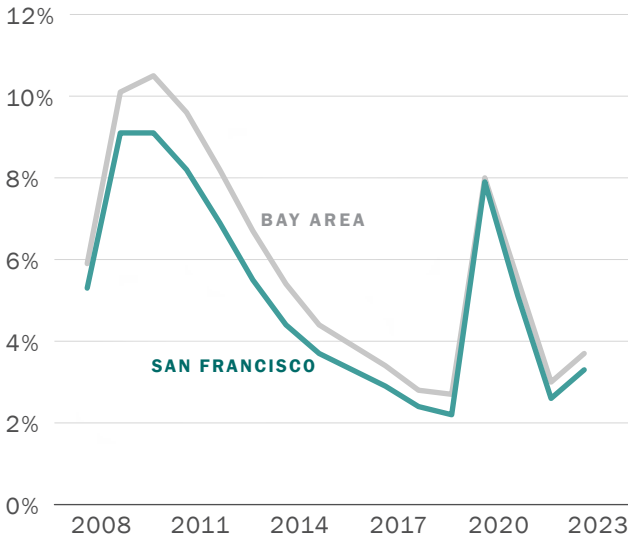


Source: California Employment Development Department. Current Employment Statistics.
Download chart data (CSV)

6.3 UNEMPLOYMENT

The unemployment rates in San Francisco and the Bay Area previously peaked at 9.1% and 10.5%, respectively, during the Great Recession in 2010. After dropping to historically low levels in 2019, the unemployment rate spiked during the first year of the pandemic to 8.0% and 8.1% for San Francisco and the Bay Area, respectively. By 2023, the unemployment rates had dropped significantly, though they remain slightly higher than the pre-pandemic rate in 2019.

Figure 6-5. Unemployment rate for San Francisco and the Bay Area, 2008 – 2023

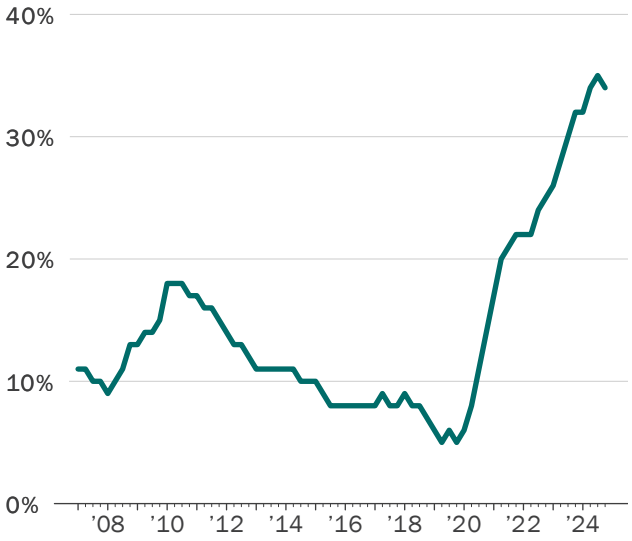


Source: California Employment Development Department. Local Area Unemployment Statistics.
Download chart data (CSV)

6.4 OFFICE SPACE VACANCY

More than 90% of the office space in San Francisco is in Downtown. Before the pandemic, office space vacancy (percentage of office space available to rent out of the total square footage of office space) in San Francisco peaked at 18% in 2010. The office vacancy rate declined prior to the pandemic, but since 2020 has climbed to previously unseen levels, though recent reports suggest the vacancy rate may again be declining with an increased demand for office space in the coming year[14]. Interestingly, the office space vacancy rate has been increasing since the pandemic even though the employment numbers in San Francisco have nearly returned to pre-pandemic levels. This may be because longer term leases may only now be expiring, belatedly revealing the effects of remote work and the pandemic-related economic downturn.

Figure 6-6. San Francisco office vacancy, 2007 – 2024



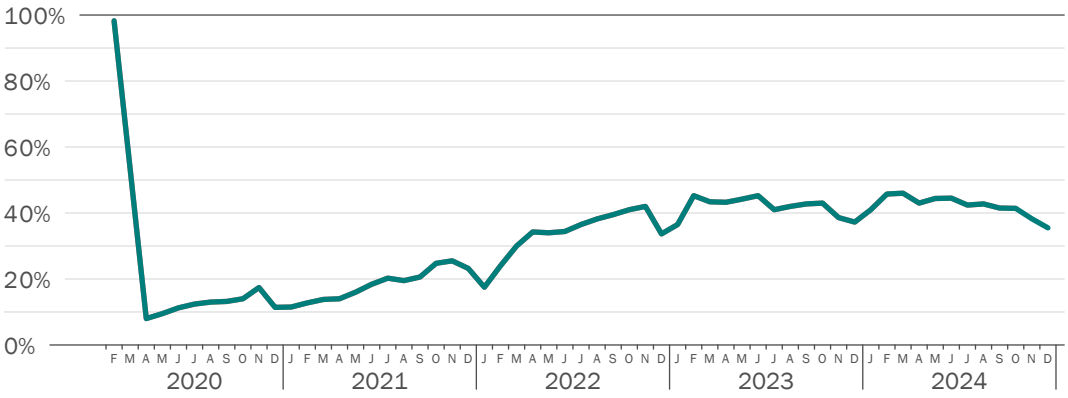
Source: Jones Lang LaSalle, via San Francisco Economic Recovery Dashboards. Now at sf.gov/data--office-vacancy-rate
Download chart data (CSV)

14 sfchronicle.com/sf/article/sf-office-vacancy-falls-19984967.php
sfexaminer.com/news/the-city/sf-office-vacancy-rate-declines-in-promising-end-to-2024/article_080950aa-be4e-11ef-95ad-e70df4f3ac7a.html

6.5 OFFICE ATTENDANCE

Office attendance, as measured by the share of office workers entering their work building relative to pre-pandemic conditions in 2019, has stabilized at 40% to 45% of 2019 attendance levels (other than periodic drops possibly due to holidays or the emergence of new COVID variants), though recent executive orders at the federal, state, and local levels have required more days in the office by government workers.

Figure 6-7. San Francisco metropolitan area office attendance/occupancy compared to pre-pandemic baseline, 2020 – 2024



Source: Kastle Systems, via San Francisco Economic Recovery Dashboards.

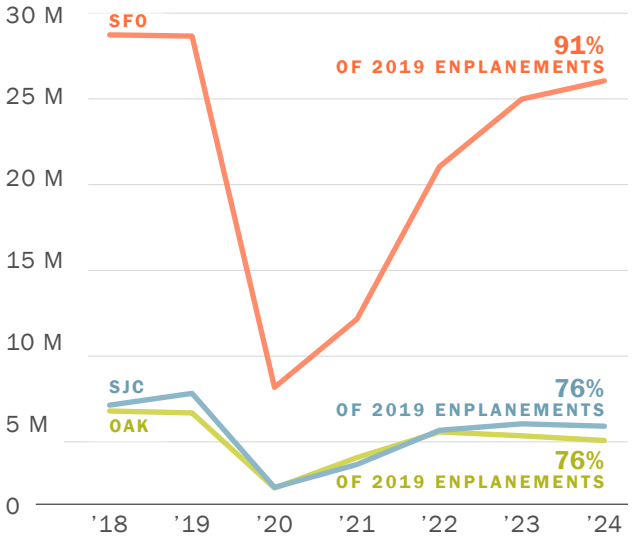
Note: The occupancy measure is a percentage that divides that number, averaged weekly, divided by a pre-pandemic baseline.

Download chart data (CSV)

6.6 AIRPORT ENPLANEMENTS

Tourism and business-related travel have historically contributed significantly to San Francisco's economy. Prior to the pandemic, annual total enplanements at SFO, OAK, and SJC were at 43 million in 2019, dropping to a low of 13 million in 2020 due to pandemic era travel restrictions and travel behavior changes. Since then, total annual enplanements across the three airports have steadily increased, reaching 37 million in 2024 (86% of 2019 numbers), with recovery being more robust at SFO (at 91% of 2019 enplanements by 2024) than at OAK or SJC (both at 76% of 2019 enplanements by 2024).

Figure 6-8. Airport enplanements at SFO, OAK, and SJC, 2018 – 2024



Source: SFO, OAK, and SJC.

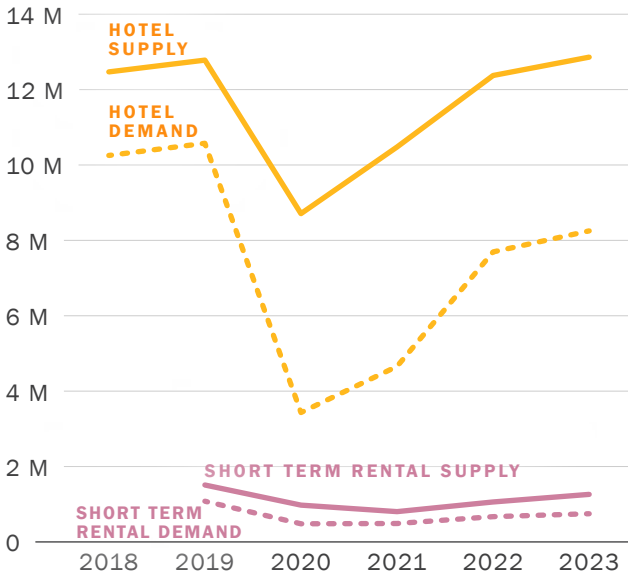
Download chart data (CSV)

6.7 ACCOMMODATIONS

The supply of hotel rooms and short term rentals (as measured by "room nights"), and the occupancy rates of these accommodations, are indicators of the strength and recovery of San Francisco's economy. Many of these accommodations are located in Downtown. Hotel room demand and supply[15] dropped between 2019 and 2020 (Figure 6-9), ultimately resulting in a decline in hotel occupancy from 83% pre-pandemic to 39% in 2020 (Figure 6-10). By 2023, hotel room supply in San Francisco has recovered to just over (101%) 2019 levels, though hotel room demand recovered less, to 78% of 2019 levels, resulting in a hotel occupancy rate of approximately 64%, significantly lower than the pre-pandemic rate of 83%.

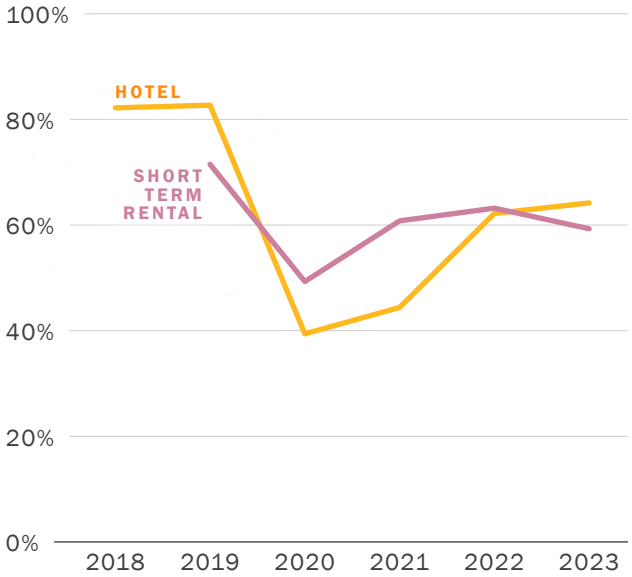
The supply of short-term accommodations is much less than hotel accommodations in San Francisco[16] and it, too, declined during the pandemic, reaching its nadir at 53% of 2019 levels in 2021. The demand for short term accommodations also declined, reaching its nadir at 45% of 2019 levels in 2020. This resulted in a drop from around 72% in 2019 to 49% in 2020 for short-term rental occupancy rate, before recovering to around 60% the following year. The occupancy rate for short-term rentals has held steady at that level since 2021. By 2023, the short-term rentals supply in San Francisco has recovered to 84% of 2019 levels, whereas short-term rentals demand still only stood at 69% of 2019 levels.

Figure 6-9. San Francisco hotel and short-term rental supply and demand, 2018 – 2023



Source: STR and AirDNA, via San Francisco Travel Association.
Download chart data (CSV)

Figure 6-10. San Francisco hotel and short-term rental occupancy rate, 2018 – 2023



Source: STR and AirDNA, via San Francisco Travel Association.
Download chart data (CSV)

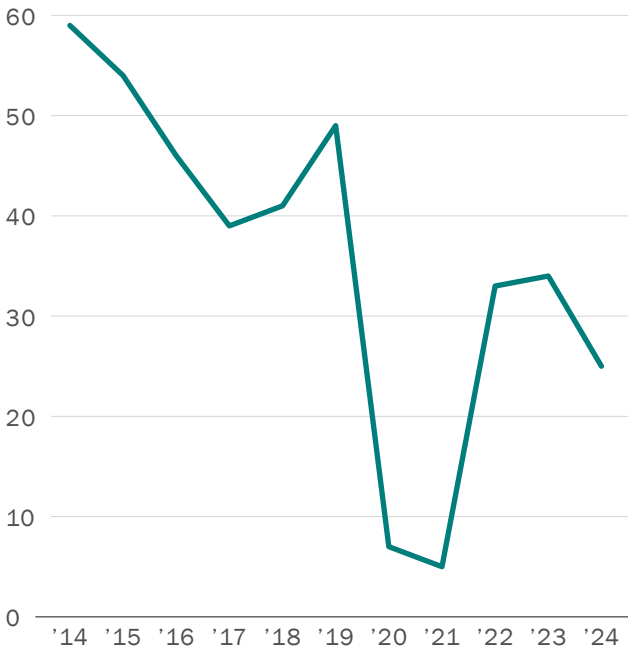
15 Some hotel rooms were used as temporary housing, others closed (either temporarily or permanently).

16 Though a short term rental unit could potentially accommodate more people than a typical hotel room.

6.8 MOSCONE CENTER EVENTS

Prior to the COVID pandemic, between 2014 and 2017, the number of events hosted at Moscone Center declined from just under 60 to just under 40 events per year, before rising to nearly 50 events per year in 2019. During the pandemic, the number of events at Moscone dropped to under 10 events per year for 2020 and 2021, before recovering to 33 – 34 events per year in 2022 – 2023, and 25 events in 2024. 32 events are currently scheduled at Moscone Center for 2025, which could lead to increased accommodation demand and sales tax revenue for San Francisco.

Figure 6-11. Number of events at Moscone Center, 2014 – 2024

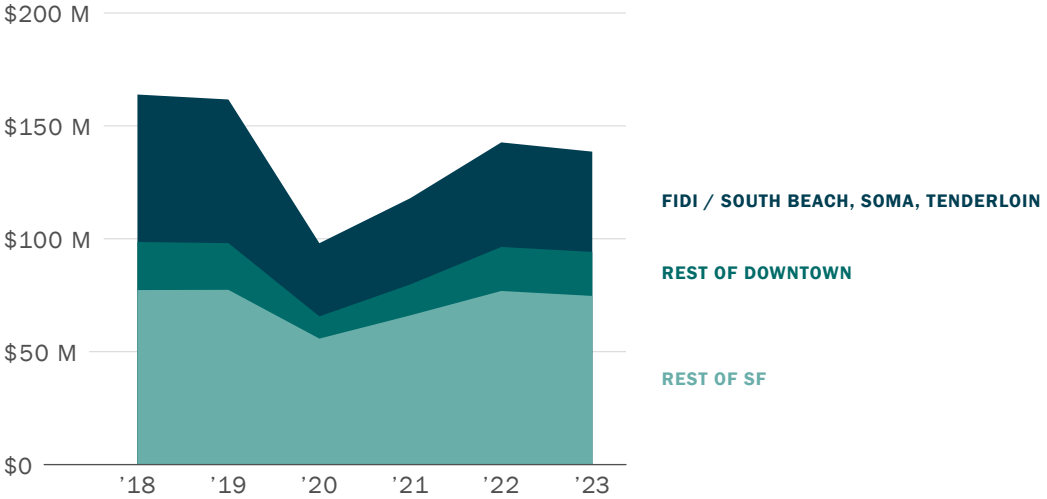


Source: San Francisco Travel Association.
Download chart data (CSV)

6.9 SALES TAX REVENUES

Pre-pandemic, sales tax revenue in San Francisco were $160 to $165 million per year, and approximately 40% of sales tax revenues came from three analysis neighborhoods in downtown San Francisco (Financial District / South Beach, South of Market, and the Tenderloin). In 2020, annual sales tax revenue in San Francisco dropped by 39%, from $162 million in 2019 to $98 million in 2020, before recovering and stabilizing at approximately 86% of pre-pandemic levels by 2023.

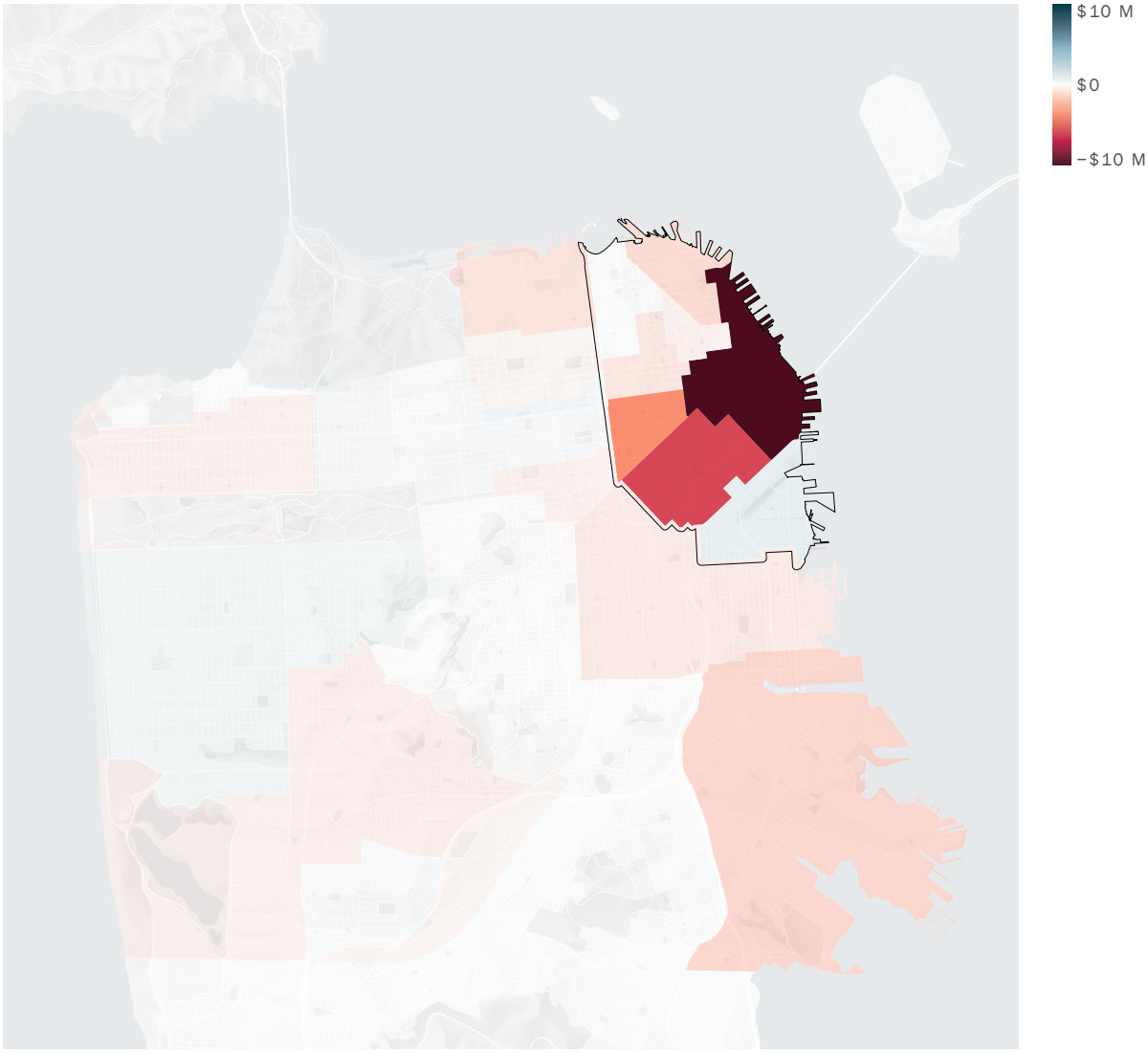
Figure 6-12. San Francisco sales tax revenue by geography, 2018 – 2023



Source: HdL Companies, via San Francisco Economic Recovery Dashboards.
Download chart data (CSV)

The drop in annual sales tax revenue in the three aforementioned Downtown analysis neighborhoods, accounts for 83% of the decline in sales tax revenue in San Francisco overall between 2019 and 2023. In contrast, sales tax revenue from the rest of the city have basically returned to pre-pandemic levels.

Figure 6-13. Difference in San Francisco sales tax revenue by analysis neighborhood, 2019 – 2023



Source: HdL Companies, via San Francisco Economic Recovery Dashboards.
Download map data (GeoPackage)

7. Conclusions

Few cities have been as impacted by the COVID-19 pandemic as San Francisco, and no part of the city has been as affected as significantly as Downtown San Francisco. The city lost 8% of its population and almost 9% of its jobs, with the heaviest work from home impacts occurring in the northeast core. While San Francisco is no longer losing population and its employment has almost returned to pre-pandemic levels, commuting patterns have fundamentally changed, with telecommuting rates remaining significantly elevated compared with pre-pandemic levels. Yet Downtown San Francisco has always been more than just a commute destination with many cultural and regional attractions. Commuter, visitor, and business travel will continue to evolve in response to return to work mandates, changes in online shopping and deliveries, and larger economic trends.

While overall trips to downtown remain 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. This warrants careful monitoring, as well as continued collaboration regionally and locally to bolster transit operating funding, lest shortfalls turn into service cuts, and greater congestion levels.

Finally, the fiscal impacts are notable for transportation in San Francisco. All of these trends are reflected in sales tax revenues that remain below pre-pandemic levels, primarily due to declines in three core Downtown analysis neighborhoods: the Financial District / South Beach, South of Market, and the Tenderloin. Lower sales and other tax revenues make it more difficult for San Francisco to fund and support key transportation investments and policies, as well as services economy-wide.

Downtown San Francisco will continue to change and recover. However, in the current moment, the structural, economic, and behavioral changes in jobs and commuting patterns have shifted the composition of travelers to be less regional and more local, with significantly greater telecommuting, a dramatic decrease in tripmaking, coupled with a notable increase in the automobile mode share and increases in congestion on some freeways. San Francisco must seize the chance for a healthy recovery: ensuring an equitable, sustainable, safe, and resilient transportation system and travel environment for 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 collaborative civic engagement across the city.

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