

Modal Choices and Spending Patterns of Travelers to Downtown San Francisco: Impacts of Congestion Pricing on Retail Trade

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ABSTRACT

Congestion pricing is a demand management strategy implemented on existing roadways to reduce traffic congestion, improve mobility, and encourage public transit ridership. The San Francisco County Transportation Authority is determining the feasibility of pricing to manage congestion, which is most severe in the Downtown, Civic Center and South of Market districts. These districts serve a variety of purposes which are not limited to office, restaurant, retail, hotel and industrial, and attract a high number of workers and visitors – both local and tourist, everyday.

The most vocal opponents to the potential congestion pricing program are downtown merchants. Many believe that their patrons primarily come by car and that drivers spend more money than transit riders and pedestrians. This study examined the travel and spending patterns to San Francisco's major retail and entertainment centers in order to assess whether these perceptions hold true. The survey found that the majority of travelers get to downtown San Francisco by either taking transit or walking, regardless of their income. Travelers using these modes spend more per month than those traveling by car as they come more frequently to engage in recreational activities. The belief that recreational customers predominantly travel by car and spend more than transit riders is not reflected in the data, nor is it consistent with similar observations in other cities. Findings indicate the need for faster, more reliable multi-modal transportation that support a vibrant economy and provide viable travel choices to all.

INTRODUCTION

Congestion pricing is a demand management strategy implemented on existing roadways to reduce traffic congestion, improve mobility, and encourage public transit ridership. Implemented in a number of cities in Europe and Asia, the concept has shown success in reducing or smoothing peak traffic conditions. The San Francisco County Transportation Authority is determining the feasibility of congestion pricing to manage congestion, which is most severe in the Downtown, Civic Center and South of Market districts of San Francisco. These districts serve a variety of purposes which are not limited to office, restaurant, retail, hotel and industrial, and attract a high number of workers and visitors – both local and tourist, everyday.

This paper focuses on the travel mode and spending patterns of travelers to downtown San Francisco. Exploring transportation choices of travelers can help to determine if the reduction in auto trips from a congestion pricing fee might negatively impact retailers and businesses. The most vocal opponents to the potential congestion pricing program are downtown merchants, who believe that most of their patrons arrive by car and the program may cause auto patrons to switch to another shopping area to avoid paying the fee. Merchants also believe that drivers spend more money in their establishments than transit riders. This study examined the travel and spending patterns, in order to assess whether these perceptions hold true.

London officials faced similar opposition by businesses when they implemented a congestion fee in central London. To determine the actual mode choice and spending habits of shoppers at retail centers inside the congestion pricing area and at suburban centers, Transport for London conducted a *Town Centres Survey* in 2003 and 2004. The results revealed that patrons preferred using transit and spent a comparable amount of money in retail or recreational establishments to drivers. The study also found that on average, walkers spent the most amount of money over the week, making small purchases more often walking through a shopping area on their way to and from work.

Instead of conducting a similar study post-implementation, the San Francisco County Transportation Authority surveyed the modal choices of patrons currently visiting the downtown area for recreational purposes. Intercepted travelers were asked about their travel mode frequency of retail/recreational trips to the area, and spending patterns. The survey was conducted over two periods, the first during the 2007 winter holiday season, and the second in April 2008 to capture non-holiday behavior.

The results of the survey reveal that the great majority of travelers use transit to get to the downtown shopping area. Transit riders spent a comparable amount to drivers over the course of a month and walkers spent more than both transit and drivers. Transit riders also came more frequently to the area for a variety of trip purposes, including shopping, dining and entertainment.

The majority of those who drove into downtown came infrequently. Those who drove tended to have the highest average recreational spending amounts per trip but due to their infrequent visits, they did not spend as much as transit riders or walkers in aggregate.

Since there are several large shopping centers in the Bay Area that compete with downtown somewhat, the survey was also conducted at The Village at Corte Madera, Stonestown Galleria and downtown Walnut Creek. The same transportation and spending questions of the downtown San Francisco survey were asked of respondents along with additional questions inquiring the reason for shopping in these other locations instead of downtown San Francisco and how often they visit downtown San Francisco, if at all. The majority indicated that they

prefer going to these locations as they are closer to home and visit downtown San Francisco monthly or rarely. These findings show that cost of travel is not the primary reason regional customers travel to downtown San Francisco infrequently. Moreover, travelers to downtown San Francisco retail areas cited the range and character of restaurants and shops as the top reasons they travel to San Francisco for retail/recreational purposes, factors that would likely remain the same or be afforded improved access with the potential congestion pricing program.

This report provides the results of a survey conducted to determine the recreational spending habits of downtown San Francisco respondents by transportation mode. As such, the survey does not ask detailed questions on commute habits to the area, if the commute and parking fees are subsidized, or opinions on congestion pricing. These types of questions were asked in a Regional Public Opinion Poll and a Stated Preference Survey conducted by SFCTA in summer and fall of 2007, respectively. The results of the opinion poll found that Bay Area residents believe that the City and County need to look for solutions to traffic congestion. The majority of respondents feel that downtown San Francisco is congested or very congested but their opinions varied as to whether congestion pricing is the method by which to improve mobility.¹

The Authority is also in the process of conducting a detailed economic assessment of potential congestion pricing impacts and benefits in San Francisco. The assessment will evaluate changes in travel behavior resulting from drivers facing more realistic costs for their decision to travel during congested periods. The analysis includes an evaluation on the 1) impacts on user and non-users of the transportation system; 2) distribution of the impacts (incidence analysis); and 3) effects on the economy.

SAN FRANCISCO'S CONGESTION PRICING STUDY

Congestion pricing is a demand management strategy implemented on existing roadways to reduce traffic congestion, improve mobility and encourage public transit ridership. It involves charging drivers a user fee to drive in specific congested areas or corridors. This system is being used in major cities all over the world and is based on personal choice. Motorists can drive if the convenience is worth the fee, use alternatives like transit, carpooling, biking or walking or choose to travel during less-congested times. Typically, congestion charging revenues are used to fund transportation improvements, including transit service, road improvements, and bicycle and pedestrian projects.

In 2005, the San Francisco County Transportation Authority received a \$1 million grant from the U.S. Department of Transportation Value Pricing Program to study congestion pricing. The Mobility, Access and Pricing Study (MAPS) aims to evaluate the feasibility of implementing a congestion pricing program in San Francisco as a means to improve mobility. The program will be assessed through both technical evaluation and public participation.

The Authority's approach studies roadway pricing in the larger context of congestion management. Congestion pricing would accompany a package of mobility improvements that raise the level of service for transit, carpooling, cycling and walking as viable alternatives to driving. This integrated approach has shown success in London, Singapore, Stockholm and other cities in redefining the set of transportation choices in a way that improves a region's quality of life while maintaining a vibrant economy.

The approach is also shaped by principles that are consistent with overall city policies and the broad goal of achieving a more vibrant and livable city for residents, workers, visitors and

businesses. Specifically, the San Francisco approach is based on four main concepts: 1) managing, not eliminating, congestion, 2) pricing to encourage informed travel decisions, 3) supporting a balanced transportation system and 4) monitoring the transportation system through performance based criteria.

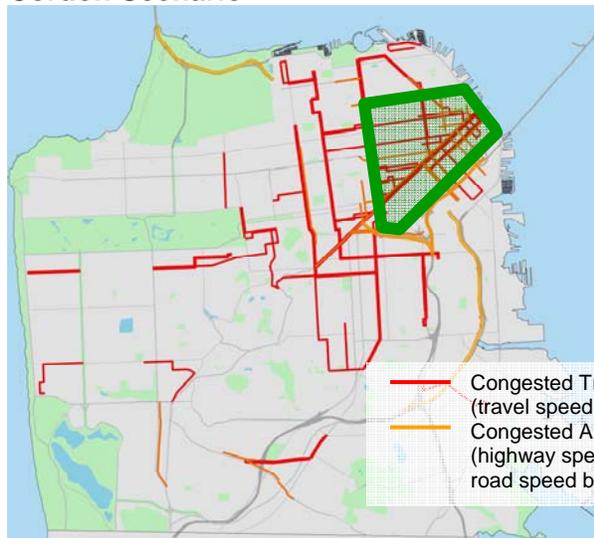
Proposed Study Area

As the designated Congestion Management Agency for San Francisco, the SFCTA regularly monitors vehicle travel speeds on the network of roads and streets in the city, and reviews other indicators of congestion including transit performance and collision data. Based on the monitoring analysis of travel speeds, the most notable congestion occurs on key commuter routes including I-280 leading to the south, I-80 through the city and US 101 to the North Bay. Within San Francisco, surface streets that experience high levels of congestion are located east of Van Ness in downtown areas and along the broader Market Street to I-80 (SOMA) corridor. Many transit routes travel at below average speed of eight miles per hour during the evening peak period, while many auto segments operate below 10 miles per hour. The low travel speeds are in part due to the high volumes of cars, buses, bicyclists and pedestrian moving through the area. On many key commuter highways, autos travel less than 30 miles per hour.

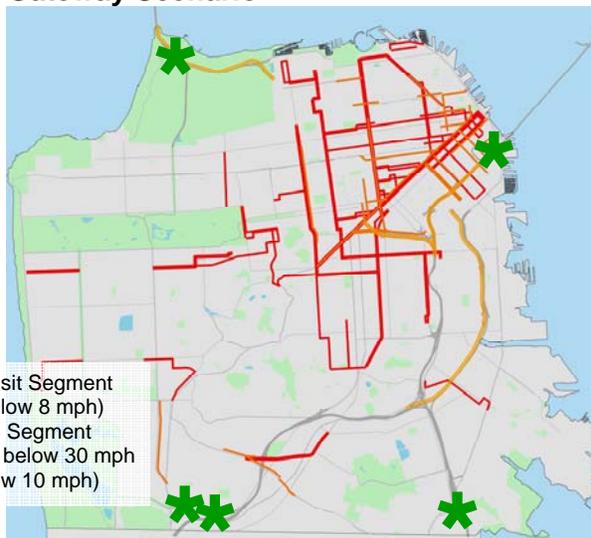
The Mobility, Access and Pricing Study examines two scenarios to determine the shape and size of the congestion pricing cordon area in San Francisco based on where auto and transit congestion is highest and would be exacerbated by projected growth patterns. One scenario focuses on the Downtown, Civic Center, Financial District and South of Market areas as illustrated in Figure 1. The second scenario focuses on key routes within or entry points to San Francisco, including on/off ramps for the Golden Gate and Bay Bridges as well as those for Interstate 280 and Highway 101, as shown by the asterisks in Figure 1.

FIGURE 1 Preliminary Congestion Charging Scenarios

Cordon Scenario



Gateway Scenario



— Congested Transit Segment
(travel speed below 8 mph)
— Congested Auto Segment
(highway speed below 30 mph
road speed below 10 mph)

Source: SFCTA, Spring 2006 LOS Monitoring; SFMTA, Spring 2007 AVL Monitoring Results

Each scenario is being studied in terms of the greatest improvement in congestion conditions, ability to provide suitable options for travel to the focus area, and potential benefits and impacts

(including environmental benefits and economic impacts). Additionally, various charging policies are being considered. The charges would focus on the peak-periods, and could be assessed either as a single inbound AM fee or both an AM & PM fee, either of which may be fixed or varied during the peak period(s).

RETAIL TRADE IN DOWNTOWN SAN FRANCISCO

San Francisco's downtown is ranked third nationwide as a top retail location behind New York City and Chicago. Retailers choose to locate in the area to draw sales from high income residents and take advantage of spending by tourists, business travelers and convention delegates. As a result, one square foot of retail rental space is approximately \$400 per year in the Union Square area and occupancy rates remain high. The elevated land, construction and renovation costs are also due to the limited growth opportunities in a small and built-out environment.ⁱⁱ

Downtown San Francisco has gone through a retail transformation in recent years. Once a market focused on primarily American department stores including Neiman Marcus and Saks Fifth Avenue and a few luxury stores including Dior and Gucci, it has now incorporated international and mainstream fashion retailers, including Zara, H&M and Juicy Couture. The expanded Westfield San Francisco Centre that opened in September 2006 added 1.5M sq.ft of space and is anchored by the largest Bloomingdale's outside of New York City.ⁱⁱⁱ

These and numerous other discount, mainstream and high end clothing, footwear, housewares, jewelry, electronics and drug stores can be found in a dense area that is also home to office space, luxury condominiums, hotels and dining establishments. Getting to and around downtown San Francisco is relatively easy, being well served by multiple different modes of transportation. Almost 30 Muni transit lines service the study area, with additional service provided to/from the region by BART, AC Transit, SamTrans and Golden Gate Transit. Those who prefer to drive can find parking on-street or in garages are conveniently located throughout the area. The area also hosts several plazas, pedestrian-only streets and wide sidewalks that are well utilized by shoppers, visitors and office workers in the area.

SFCTA RETAIL AREA SURVEY METHODOLOGY

The SFCTA retail area survey was conducted in two phases, one during the November-December 2007 holiday period and the second during the first two weeks of April 2008 for a non-holiday sampling. Travelers were intercepted during the middle of the week only, Tuesday, Wednesday and Thursday, to catch more habitual travelers to the survey areas and also because the congestion fee, if implemented, would not be in effect on weekends.

The survey locations chosen for the first phase of the survey were downtown San Francisco/Union Square area and downtown Walnut Creek.¹ Downtown Walnut Creek incorporates an outdoor mall, Broadway Plaza, into its downtown and hosts a mix of stores and restaurants in a compact and walkable environment.

The second phase of the survey also included downtown San Francisco/Union Square area and downtown Walnut Creek, and added the Village at Corte Madera in Marin County and

¹ SFCTA also approached Stonestown Galleria in the Sunset District of San Francisco. Since the holiday season is the busiest shopping period, Stonestown management did not permit the first phase of the survey on premises, but approved the April survey.

Stonestown Galleria in San Francisco. The Village at Corte Madera is owned by the same development corporation that owns downtown Walnut Creek's Broadway Plaza and was chosen as it is one of the main shopping destinations for residents of Marin County. Stonestown Galleria is located in San Francisco's Sunset/Lake Merced neighborhood and hosts more than 130 retailers.

The first phase of the survey was conducted on November 27–29 as well as December 4–5, 2007. The dates of the second phase were April 1–3, 8–9, 2008. Surveyors stood at designated locations in each survey area to catch a diverse set of respondents, intercepting every fifth visitor who looked over the age of sixteen. In downtown San Francisco, surveyors were positioned at three locations between the hours of 3:00 PM and 7:00 PM to catch the after-work and recreational crowd on all survey days. Each of the locations were in a distinct retail area that represented both transit riders and drivers, being located adjacent to a parking garage, transit portal or both. The Village at Corte Madera permitted surveyors to stand in the central gathering area while at Stonestown Galleria, surveyors stood in the main entry area. In downtown Walnut Creek, surveying started and ended an hour earlier, from 2:00 PM to 6:00 PM, as activity tended to dwindle after 6:00 PM. Surveyors intercepted travelers at and around the intersection of Olympic Boulevard and Main Street.

The survey instrument at all locations contained the same eleven questions though the shopping mall surveys included extra questions asking why respondents chose to come to the malls over downtown San Francisco and how often they go to downtown SF, if at all. All surveys took approximately three minutes to complete and respondents were given the option to enter into a raffle to win a local or regional transit pass depending on the location of the survey.

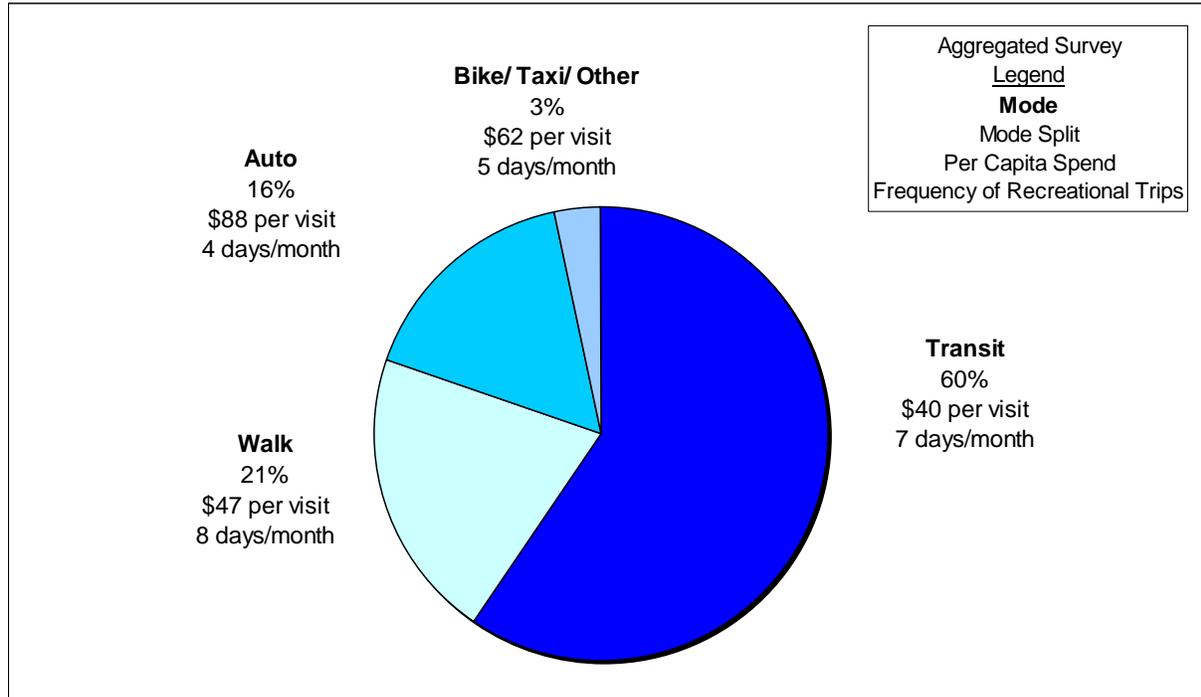
The target number of surveys for each location was 200 to ensure good sampling of the visiting population at the 95% confidence level and using a confidence interval of four. For all locations, the target was reached in both phases. In downtown San Francisco, a total 1390 surveys were collected over both phases.

SURVEY FINDINGS

Overview

The purpose of the survey was to understand the spending habits and frequency of visits by downtown patrons by travel mode. The results of the survey conducted in downtown San Francisco showed that the majority of respondents traveled by transit and that transit riders came most frequently to the area for both general and recreational purposes. Per recreational trip, transit riders spent less than drivers and walkers; however, considering they frequented downtown almost twice as often as drivers and comprised the great majority of respondents, they outspent other modes. Figure 2 displays the per capita spending amounts per person and the frequency in accessing downtown for recreational trips by mode.

FIGURE 2 Average Frequency of Recreational Trips and Spend by Mode of Access to Downtown San Francisco



n = 1187

The results also indicate that most travelers are accustomed to or prefer taking transit to downtown, especially if they visit downtown frequently for work or recreational purposes. The majority of those who drove into downtown came infrequently and paid for parking.

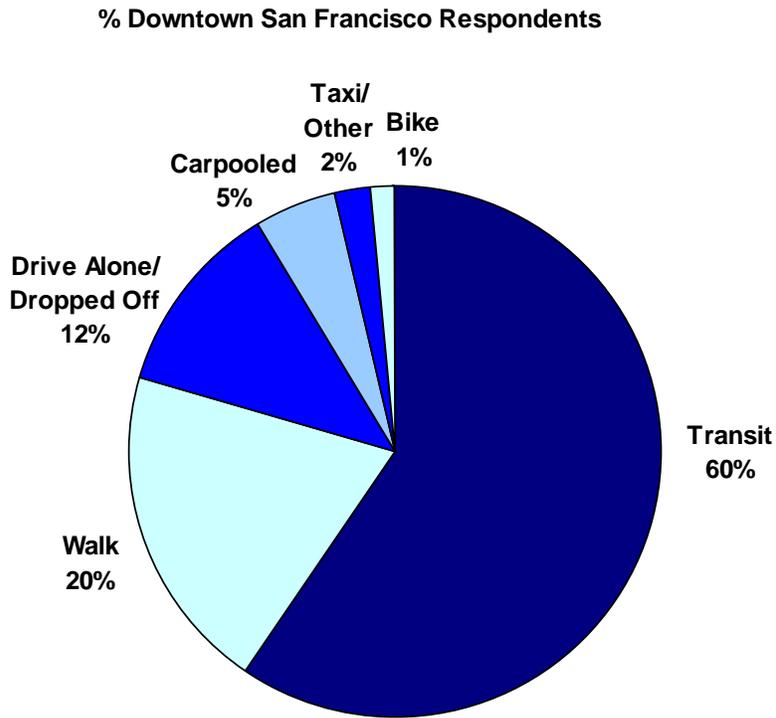
Travel Mode to Downtown San Francisco

The majority of respondents, 60%, indicated that transit accounted for the longest leg of their journey to downtown San Francisco. Though most transit riders lived in San Francisco, a substantial number took transit from the East Bay and the South Bay.

A high number of respondents, 20%, chose to walk to downtown San Francisco. They primarily live in neighborhoods close to or surrounding downtown. Respondents who chose to drive or get dropped off in the area comprised 12% of all respondents and an additional five% carpooled. Most of those who traveled by car lived outside of San Francisco, though 36% of drivers were inhabitants of the city. Respondents chose to drive primarily due to transit service being inadequate or not close to their home. Other reasons included transporting large items, shuttling children or a large group, or favoring driving speed over transit.

Most respondents, 43%, who drove alone or carpooled to downtown San Francisco paid between \$10 and \$15 to park. Of these respondents, the majority, 51%, came to downtown to shop or window shop while an additional 25% came for work related trips. Dining and entertainment trips together contributed 32% of car trips paying \$10 or more to park. On the other hand, 17% of respondents indicated that they parked for free. Of these respondents, work trips comprised the majority, at 33%, followed by shopping trips, at 24%.

FIGURE 3 Travel Mode to Downtown San Francisco



Transit and walking together comprised the main travel modes of respondents of all income groups, although car use did rise with income. Table 1 below shows the share of respondents to the area by mode of travel and income group.

TABLE 1 Proportion of Travelers by Mode and Income – Downtown San Francisco (%)

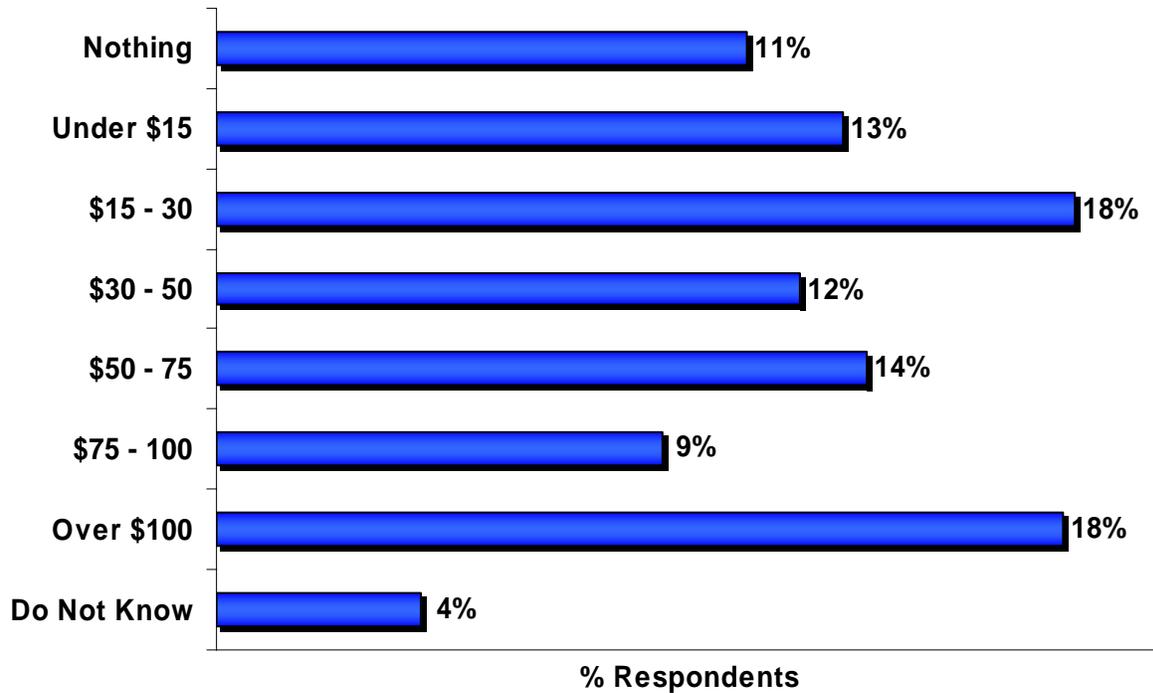
Income Group	Under \$35,000	\$35,000–50,000	\$50,000–75,000	\$75,000 – 100,000	Over \$100,000	Do Not Know	Total
Transit	31	19	17	12	8	14	100%
Walk	26	18	15	9	17	14	100%
Drove Alone/Dropped Off/Carpooled	12	12	20	24	24	9	100%
Bike/Taxi/Other	23	11	19	28	13	6	100%

n = 1314

Spending Patterns

The survey asked respondents to calculate the amount they had spent or were planning to spend in the area that day for recreational purposes, specifically at shops, restaurants or entertainment venues. Respondents chose the various spending categories at almost the same frequency, though slightly more respondents picked the \$15 to \$30 or over \$100 categories, at 18% each.

FIGURE 4 Spending Amounts for Recreational Purposes - Downtown San Francisco



Comparing the recreational activity spending amounts by mode, drivers and carpoolers spent more per visit than all other modes, at an average of \$88 each. Considering that they came into downtown San Francisco an average of four days per month for recreational purposes and comprised 17% of all respondents, the monthly total for each driver averaged to \$259. Transit riders, spent an average of \$40 per visit, but traveled to downtown at almost double the frequency, an average of seven days a month. Therefore, over the course of the month, transit riders spent an average of \$274. With transit riders comprising the majority of respondents, 60%, the results show that they generate substantial business in downtown. Walkers outspent both transit riders and drivers, spending \$291 per month and came to downtown eight days a month.

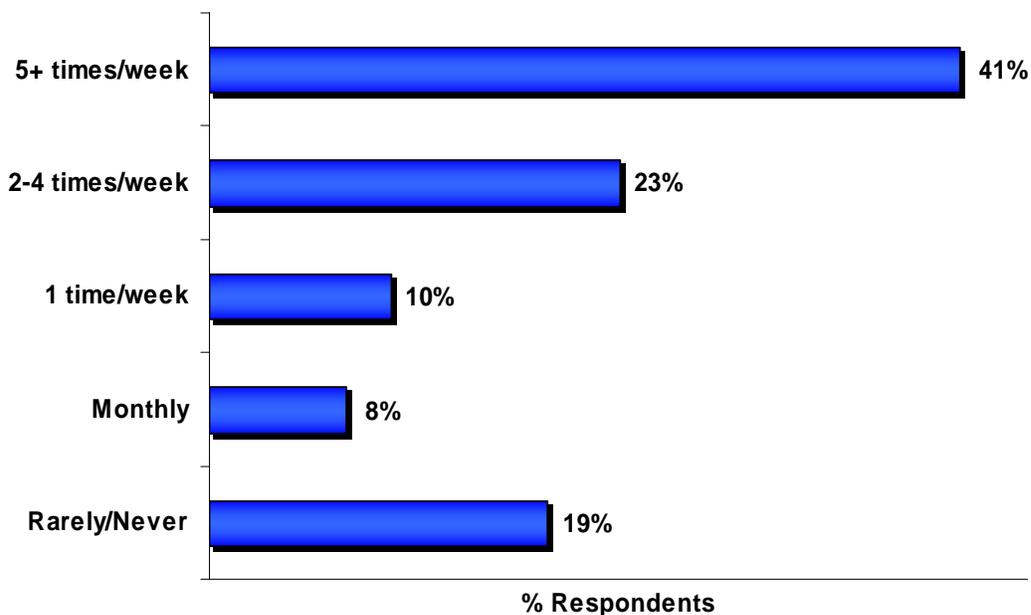
TABLE 2 Recreational Trip Frequency and Spend by Mode - Downtown San Francisco

Mode	Proportion of Travelers by Mode	Average Recreational Trip Frequency (days/month)	Recreational Trips Spend per Person Per Visit	Recreational Trips Spend per Person per Month
Transit	60%	7	\$40	\$274
Walk	21%	8	\$47	\$291
Drove Alone/Dropped Off/Carpooled	16%	4	\$88	\$259
Bike/Taxi/Other	3%	5	\$62	\$152

n = 1187

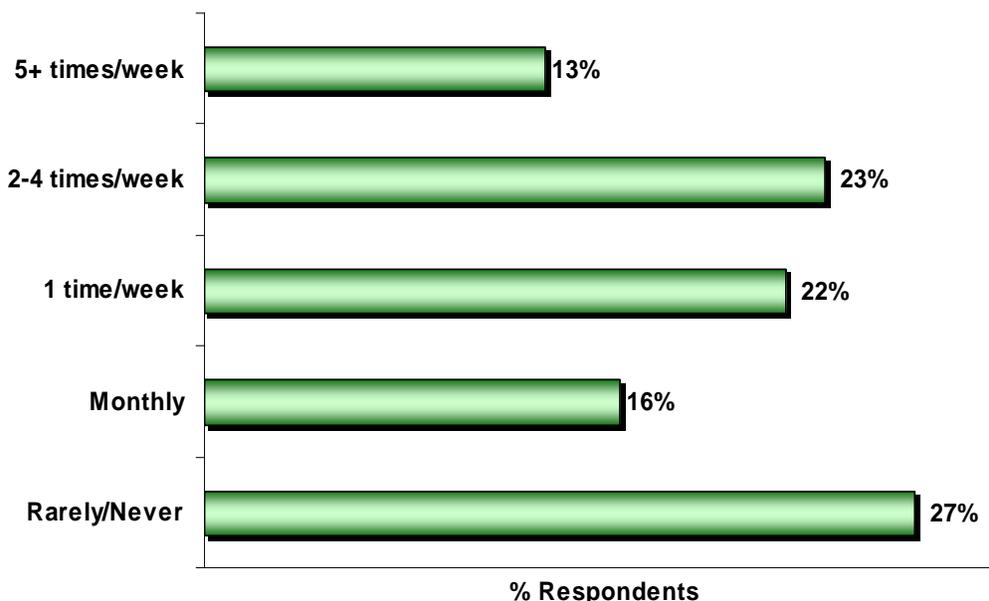
Frequency of Visits to the Area

Respondents were asked to specify the number of times they came to downtown San Francisco for all trip purposes, including work, recreational, educational and administrative. The majority of respondents, 74%, indicated that they come to the area at least once a week.

FIGURE 5 Frequency of Visits to Downtown San Francisco for All Trip Purposes

The frequency decreased slightly for purely recreational purposes, including retail shopping, dining or visiting an entertainment venue. Though many of the respondents did frequent the downtown shopping areas one day a week or more, 58%.

FIGURE 6 Frequency of Visits to Downtown San Francisco for Recreational Shopping, Dining or Entertainment Purposes



Again transit riders and walkers came downtown with the highest frequency. Over 60% of transit riders came downtown once a week or more for recreational purposes and 55% of walkers indicated the same frequency. Of drivers, 41% came downtown once a week or more.

TABLE 3 Frequency of Recreational Visits by Mode – Downtown San Francisco

Mode	5+ Times/Week (%)	2-4 Times/Week (%)	1 Time/Week (%)	Monthly (%)	Rarely/ Never (%)	Total
Transit	12	27	25	16	20	100%
Walk	22	18	15	6	39	100%
Drove Alone/Dropped Off/Carpooled	6	17	19	26	33	100%
Bike/Taxi/Other	9	23	13	11	45	100%

n = 1345

In general, the more frequent travelers downtown were transit riders or pedestrians. Table 4 below lists the average frequency to downtown for general and recreational purposes by mode.

TABLE 4 Frequency by Mode to Downtown San Francisco

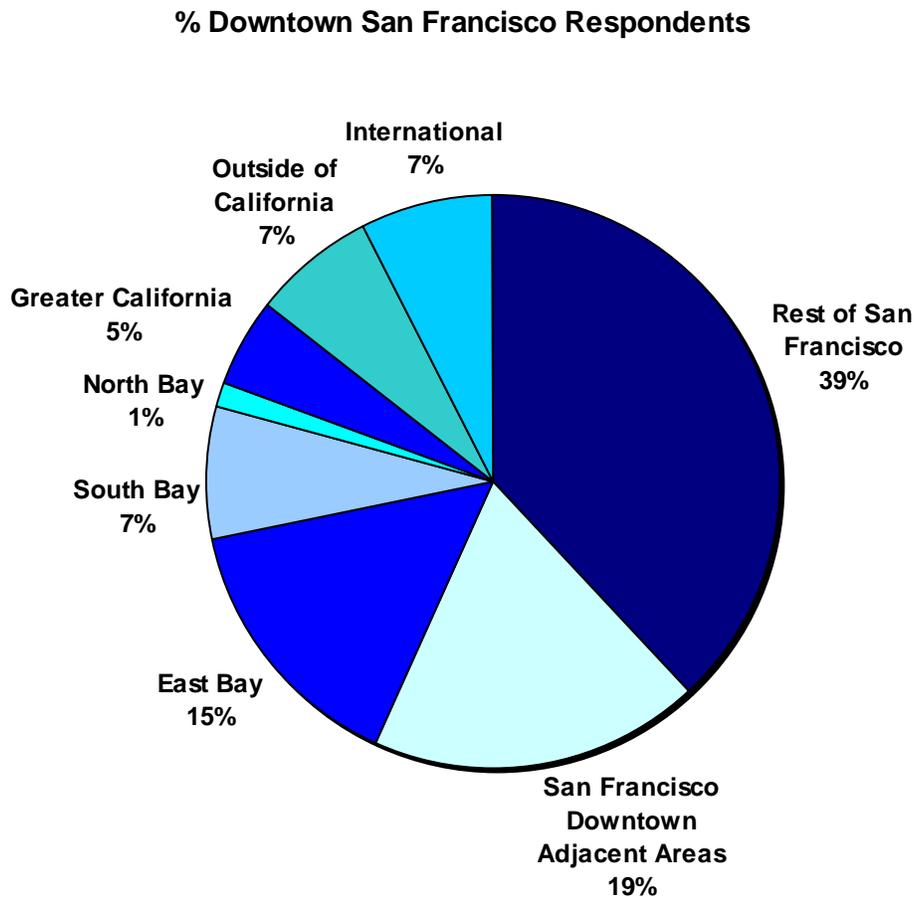
Mode	General Trip Frequency (days/month)	Recreational Trip Frequency (days/month)
Transit	13	7
Walk	12	8
Bike/Taxi/Other	9	5
Drove Alone/ Dropped Off/ Carpooled	7	4

n = 1344

Home Location of Downtown San Francisco Respondents

The majority, 57%, of travelers to downtown San Francisco are city residents. However, 24% of visitors did come from other parts of the Bay Area, and an additional 14% lived outside of California or the United States. Those from other parts of California came primarily from the Sacramento, Central Valley or Los Angeles regions.

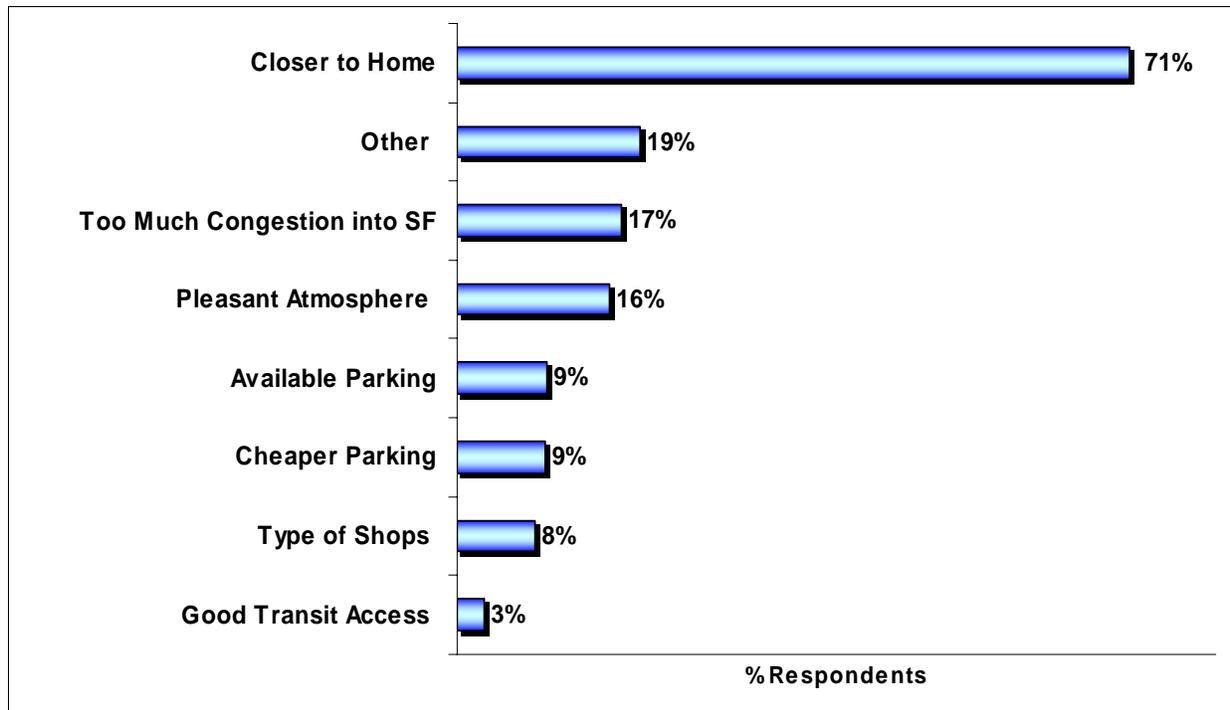
Figure 7 Home Location of Downtown San Francisco Respondents



Reasons for Visiting Other Bay Area Shopping Locations over Downtown San Francisco

Survey participants in The Village at Corte Madera, Stonestown and downtown Walnut Creek were asked why they came to these locations rather than going to downtown San Francisco for recreational activities. The overwhelming majority answered that the locations were closer to home. Cheaper and available parking had little bearing on why people chose one location over the other. Another top reason for respondents of all locations was the level of congestion traveling to San Francisco. On the other hand, San Francisco travelers included the type of shops, range of restaurants, and pleasant atmosphere among the top reasons for traveling to downtown retail/recreational locations.

FIGURE 8 Reasons for Going to the Village at Corte Madera, Stonestown or Downtown Walnut Creek Over Downtown San Francisco



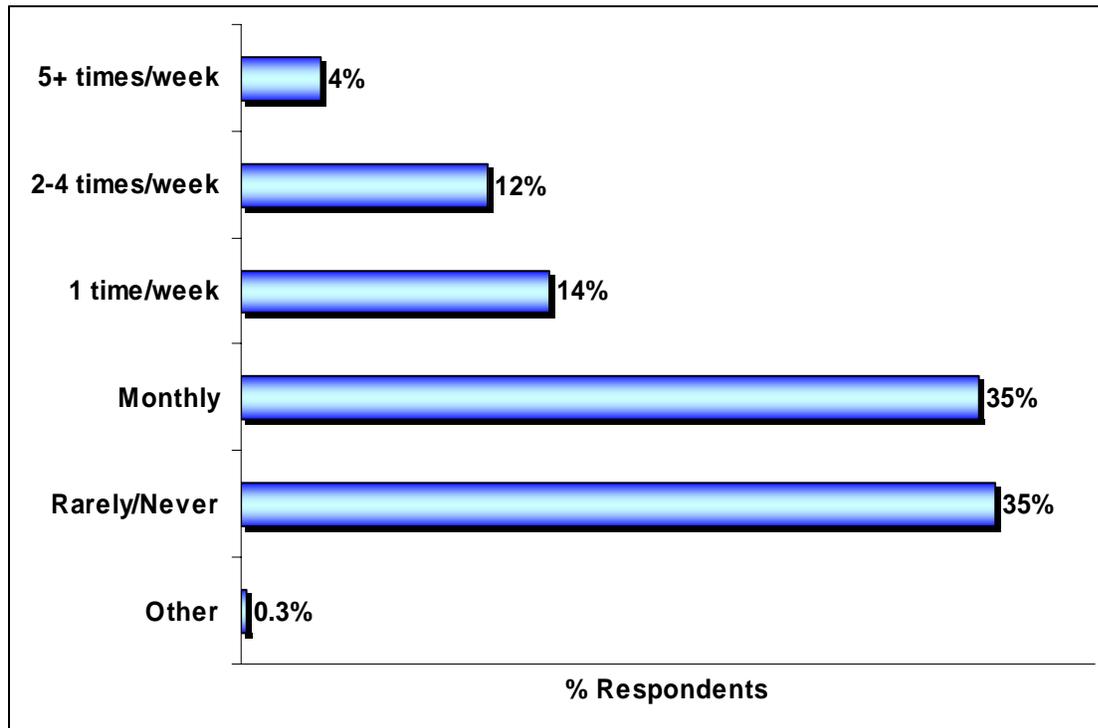
Note: Categories total to over 100% as respondents could choose more than one answer.

'Other' includes the following: for Corte Madera respondents, the category included meeting friends, bridge toll and inconvenient ferry schedule; Stonestown respondents added medical appointments and that the mall is a convenient stop on the way home from work; downtown Walnut Creek respondents highlighted the homeless population in San Francisco and running errands as other reasons for not traveling to downtown San Francisco.

Frequency of Visits to Downtown San Francisco by Survey Respondents of Corte Madera, Stonestown and Downtown Walnut Creek

Survey participants in the Village at Corte Madera, Stonestown and downtown Walnut Creek were asked the frequency they visit downtown San Francisco for recreational purposes, if at all. Corte Madera and downtown Walnut Creek respondents indicated that they visited monthly or rarely. Stonestown respondents mainly specified the same frequency though many respondents also indicated that they visited downtown San Francisco two to four times a week.

FIGURE 9 Frequency of Visits to Downtown San Francisco for Recreational Purposes by Survey Respondents in Village at Corte Madera, Stonestown or Downtown Walnut Creek



The findings from this retail survey are supported by similar survey efforts, including an intercept survey in a neighborhood commercial corridor and a citywide parking study. A study of 777 visitors to San Francisco's Columbus Avenue, a neighborhood commercial corridor in North Beach, also found that transit and walking were the two main travel modes to Columbus Avenue. Similarly, it found that for recreational activities, transit users and walkers spend less per visit, but come to the area at twice the frequency, and thus spend more than drivers on a monthly basis.

A citywide parking study begun in April 2006 also shows high non-auto mode shares. Intercept surveys were conducted in Bernal Heights, Cow Hollow, Hayes Valley, and West Portal, all neighborhoods with commercial and residential streets, and a range of transit access, supply of public off-street parking, major institutions, income levels and geographic distribution across the city. Approximately 100 surveys were administered on weekdays in each location (just over 400 total), on public residential sidewalks, near customer parking lots, and along the outside perimeter of stores. The study found that in all four of these neighborhoods, the majority of trips are made by non-auto modes.

CONCLUSION

Currently, the majority of travelers come to downtown San Francisco shopping areas by either taking transit or walking, regardless of their income. Travelers using these modes spend more per month than those traveling by car as they come more frequently to engage in recreational activities. Therefore, the belief that retail or recreational customers predominantly travel by car and spend more than transit riders is not reflected in the data, nor is it consistent with similar

observations in other cities. Though drivers spend more than transit riders and walkers on a per-trip basis, when the frequency of trips is taken into account their spending amounts turn out to be equal to that of transit riders over the course of a month. However, both drivers and transit riders did not spend as much as walkers, indicating that walkers generate substantial income for retailers. Findings indicate the need for faster, more reliable multi-modal transportation that support a vibrant economy and provide viable travel choices to all.

The results of the study impart some lessons to consider when developing a congestion pricing scheme:

1. Alternative transportation dominates the mode choice of travelers to downtown San Francisco. Even those in the highest income brackets used transit or walked over driving. As the South of Market and financial districts become home to an increasing number of luxury condominiums, the number of walkers would most likely increase. Retailers should be cognizant of their customers' reliance on a variety of modes to come into the area to shop, dine or be entertained. Policy and planning should therefore balance the needs of alternate mode users while not compromising those of drivers.
2. Despite the competition from large suburban malls in the Bay Area, San Francisco still retains a competitive edge, being home to a mix of retailers, cultural venues and restaurants that cannot be found elsewhere in the region. Furthermore, respondents are attracted to downtown for the atmosphere but dislike the congestion. A potential congestion pricing program that enhances mobility and improves the walking and transit conditions to the area would add benefit, making the area an even more attractive destination.
3. Most recreational activity occurs during weekday off-peak periods or on weekends when the congestion fee would not be in effect. Understanding more concretely when respondents choose to patronize shops, restaurants and other entertainment venues can help to determine the congestion charging schedule in order to minimize any impact to businesses and to drivers accessing downtown for recreational purposes.
4. Those living in the broader Bay Area, including Corte Madera and Walnut Creek are not likely to decrease the number of their visits to downtown San Francisco as they for the most part prefer to go to retail locations closer to home, traveling to San Francisco for other reasons, including special events, theater shows, occasional dining and nightlife. Since some respondents indicated that San Francisco congestion creates a deterrent, a congestion pricing scheme that improves mobility may encourage shoppers to come to San Francisco.

Overall, downtown San Francisco remains a competitive market in the regional, national and international economy. Travelers from a diverse set of areas come to experience its compact, walkable shopping and dining environment. It is an area that is always reinventing itself to keep abreast of trends in the retail market and transportation sector. A congestion charge may not detract from the area's success; instead, it may generate funds to improve alternative mode access, enhance streetscapes and increase the pedestrian and bike network. As London officials observe, recreational activity has increased in the congestion charging zone as investments have been made to improve the pedestrian and transit environment. Those who prefer to drive would also benefit from less congestion and therefore less time wasted en route to their destinations.

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