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Routing Transit's Transformation through Uncertain Times: Current Trends

October 27, 2021

Public Opinion Research: What Do Riders Want?

The Blue Ribbon Task Force was informed by wide-reaching public opinion research and feedback from targeted focus groups.

A primary finding was that certain factors consistently and persistently influence how often people ride transit in the Bay Area.

Bay Area residents want transit service that is:

Simple to understand and easy to use

Reliable, predictable and frequent

Safe and clean

Affordable and accessible

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Summary of Research Findings

▸ Bay Area residents, both transit riders and not, were not satisfied with public transit prior to the pandemic, and **they demand better and believe now is the time to act**. Reliability, frequency, ease of use, and personal safety on board are all viewed as inadequate.

▸ Most Bay Area residents (87%) believe public transit is important to the Bay Area. **Reliable, frequent, and safe transit for the Bay Area** is a priority for nearly everyone, whether they ride or not.

▸ Coordinated public transit that operates as a **seamless, multimodal transit system** for the Bay Area is overwhelmingly popular (89% support). Support is high across riders and non-riders, and all regions of the Bay Area.

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Elements of Seamless Transit

Bay Area residents want the same things:

▸ **92%** support real-time information on wait times and vehicle locations

▸ **91% - 93%** support better transit for dependent populations

▸ **91%** support more direct service, fewer transfers, and shorter wait times

▸ **88%** support a regional network manager that can set fares, align routes and schedules, and standardize information

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Elements of Seamless Transit

A super-majority of Bay Area residents agree the following items are important:

▸ **92%** - easy to use and uniform maps and signage

▸ **90%** - single mobile app for planning, schedules, and information

▸ **89%** - a single set of fares, passes, discounts, and transfer policies are important

▸ **80%** - dedicated travel lanes along key transit routes for buses and carpools

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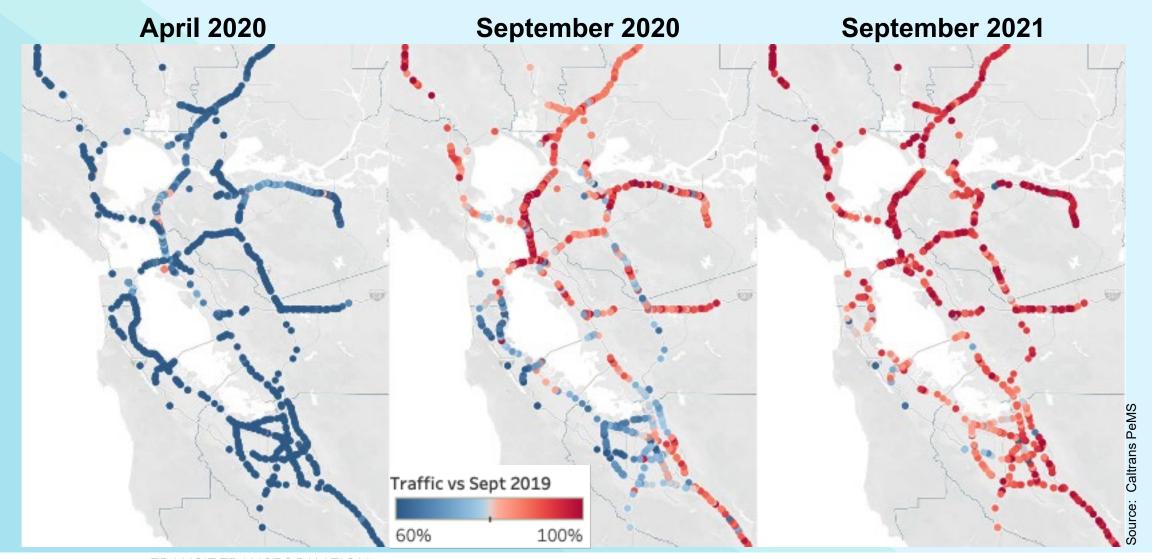
Future Aspirations vs. Current Reality

‣ A great deal of uncertainty still exists and is disrupting traffic and transit patterns

‣ COVID recovery travel patterns are still in flux

Traffic Has Returned Across Most of Region Highest on Corridors Served by BART

April 2020   **September 2020**   **September 2021**

Traffic vs Sept 2019

60%   100%

Source: Caltrans PeMS
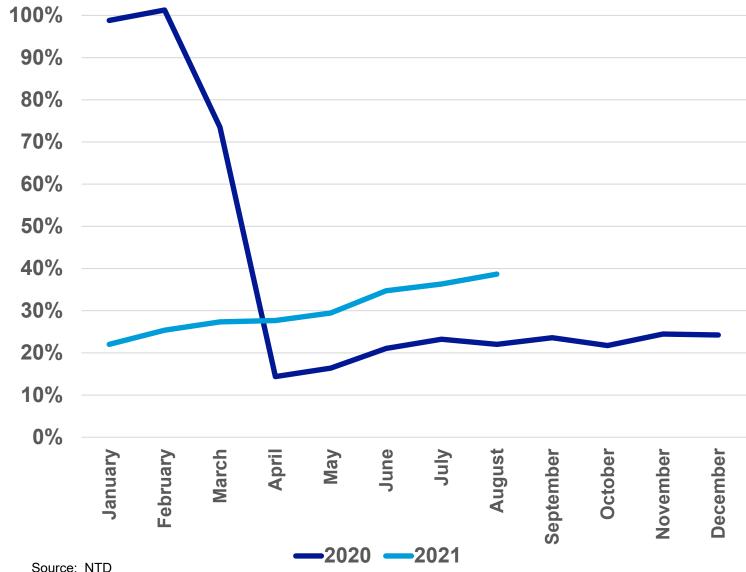
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Bay Area Transit Ridership Is Climbing but Still Way Down
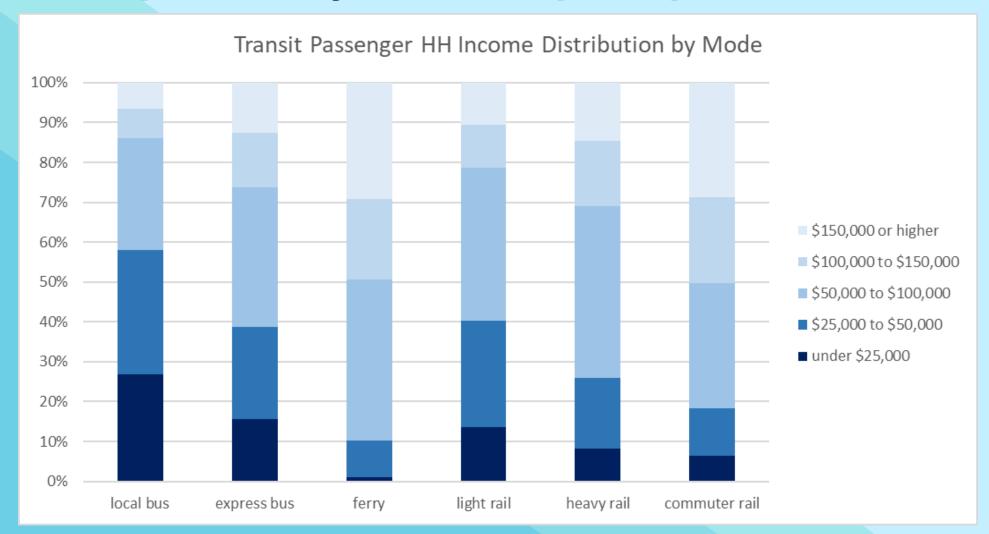
▶ Ridership on local services has returned more quickly than regional commute services.

▶ On regional systems, weekend ridership has returned more quickly than weekday

Bay Area Transit Ridership vs 2019

Source: NTD

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Transit Use and Household Income – A Comparison by Mode Helps Explain Uneven Recovery

Transit Passenger HH Income Distribution by Mode

Legend:
- $150,000 or higher
- $100,000 to $150,000
- $50,000 to $100,000
- $25,000 to $50,000
- under $25,000

Modes: local bus, express bus, ferry, light rail, heavy rail, commuter rail
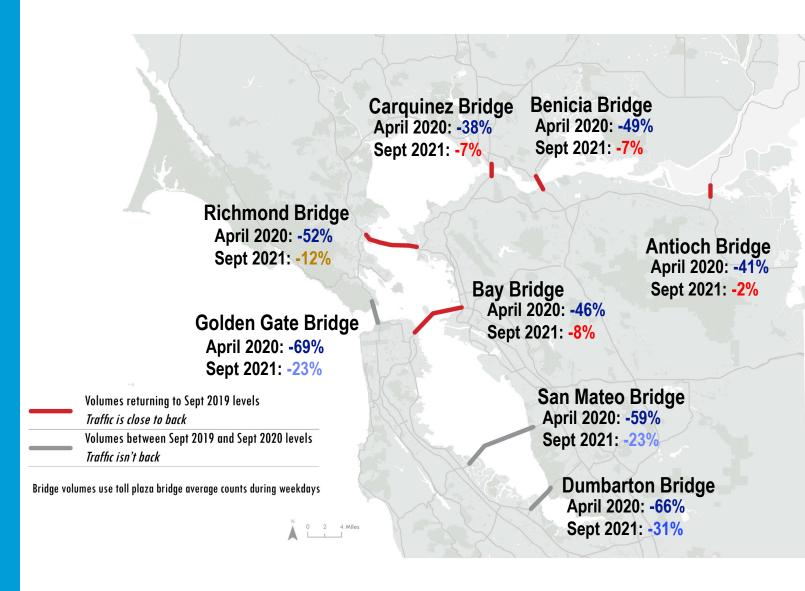
Note: Transit Passenger data based on Transit Passenger Survey 2014-2019, weekday riders only.

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Bridge Traffic Almost Back to Pre-Pandemic, Except Southern Bridges

▶ All bridges saw a rapid drop in volumes in the onset of the COVID-19 and shelter in place order;

▶ Majority of the bridges are back to 90% of pre-pandemic volumes;

▶ San Mateo and Dumbarton Bridges stand out as outliers – still 23% and 31% below, respectively.

Carquinez Bridge
April 2020: -38%
Sept 2021: -7%

Benicia Bridge
April 2020: -49%
Sept 2021: -7%

Richmond Bridge
April 2020: -52%
Sept 2021: -12%

Antioch Bridge
April 2020: -41%
Sept 2021: -2%

Bay Bridge
April 2020: -46%
Sept 2021: -8%

Golden Gate Bridge
April 2020: -69%
Sept 2021: -23%

San Mateo Bridge
April 2020: -59%
Sept 2021: -23%

Dumbarton Bridge
April 2020: -66%
Sept 2021: -31%

— Volumes returning to Sept 2019 levels
Traffic is close to back

— Volumes between Sept 2019 and Sept 2020 levels
Traffic isn't back

Bridge volumes use toll plaza bridge average counts during weekdays

N 0 2 4 Miles

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Single Occupant Vehicle (SOV) Trips Have Recovered Faster Than Carpool Or Transit

SOV Increased

Never decreased and peaked at 32% above pre-COVID levels, now at 18%
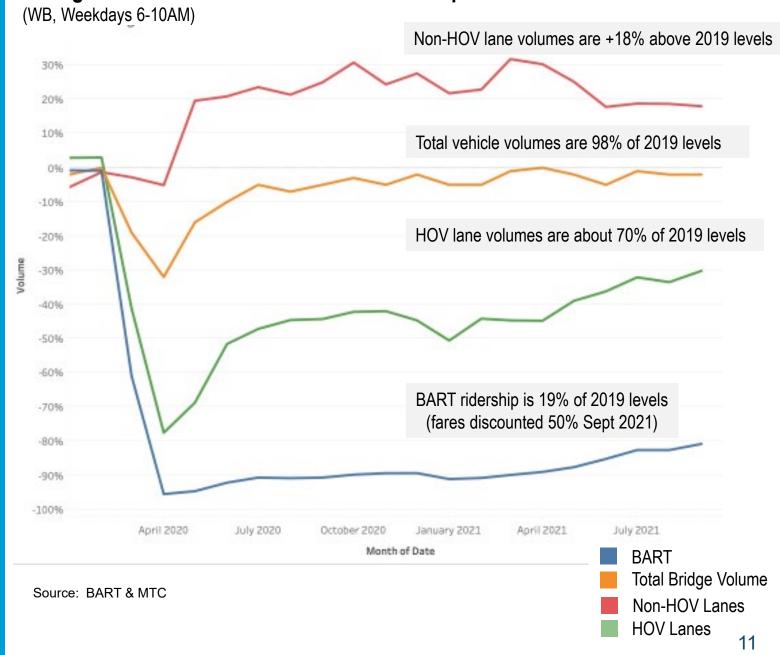
Carpool (HOV) Recovery Slower

Dropped to -78% but have recovered to -30%

Transit Recovery Slowest

BART peak period Transbay trips slowly increasing from -96% down, but still down -81%

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Changes in SFOBB & BART Traffic & Ridership vs 2019
(WB, Weekdays 6-10AM)

Non-HOV lane volumes are +18% above 2019 levels

Total vehicle volumes are 98% of 2019 levels

HOV lane volumes are about 70% of 2019 levels

BART ridership is 19% of 2019 levels
(fares discounted 50% Sept 2021)

Source: BART & MTC

Legend:
- BART
- Total Bridge Volume
- Non-HOV Lanes
- HOV Lanes

Congestion Is Returning Differently Across the Region

Above 2019 Levels

I-80 EB SF to Vallejo	**+8%**

0-15% Below 2019 Levels

I-580 WB I-80 to US-101 (AM) **-5%**	**I-580 EB** I-280 to I-80 **-7%**	**SR-29 SB** Calistoga to Napa **-9%**
I-680 NB I-580 to Benicia **-12%**	**US-101 NB** GGB to Santa Rosa **-13%**	

15%-30% Below 2019 Levels

US-101 SB SF to Gilroy **-21%**	**I-880 NB** I-280 to I-80 **-24%**	**SR-37 EB** US-101 to I-80 **-28%**
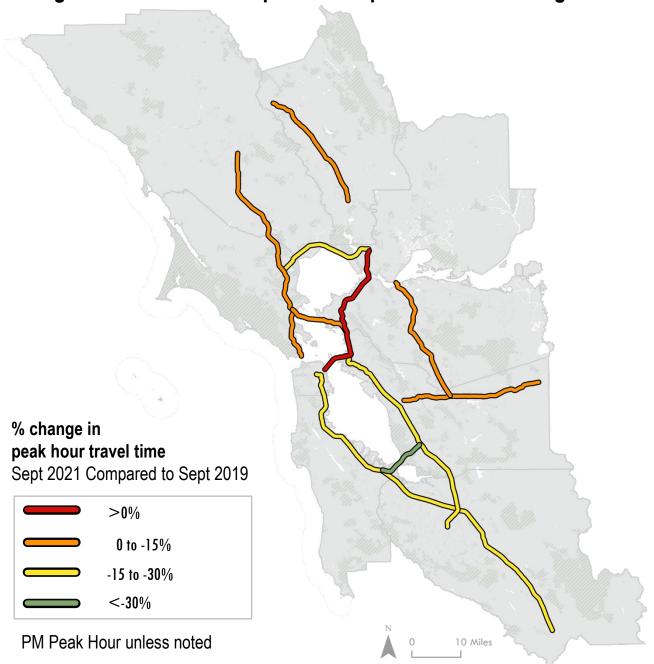
>30% Below 2019 Levels

Dumbarton EB US-101 to I-880	**-57%**

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Change in Travel Time Compared to September 2019 During Peak Hour

% change in peak hour travel time
Sept 2021 Compared to Sept 2019

▬▬▬	>0%
▬▬▬	0 to -15%
▬▬▬	-15 to -30%
▬▬▬	<-30%

PM Peak Hour unless noted

0 —— 10 Miles

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