

How Travel Has Changed: Pre- and Post-Pandemic Patterns from Travel Diary Surveys

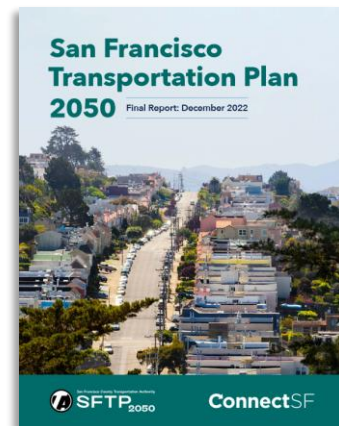
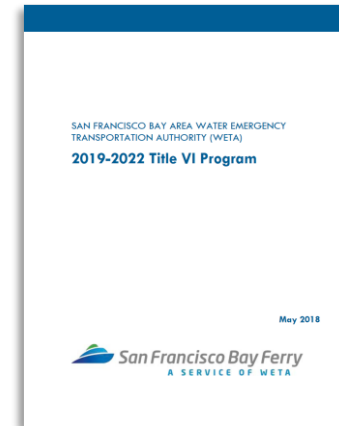


**METROPOLITAN
TRANSPORTATION
COMMISSION**

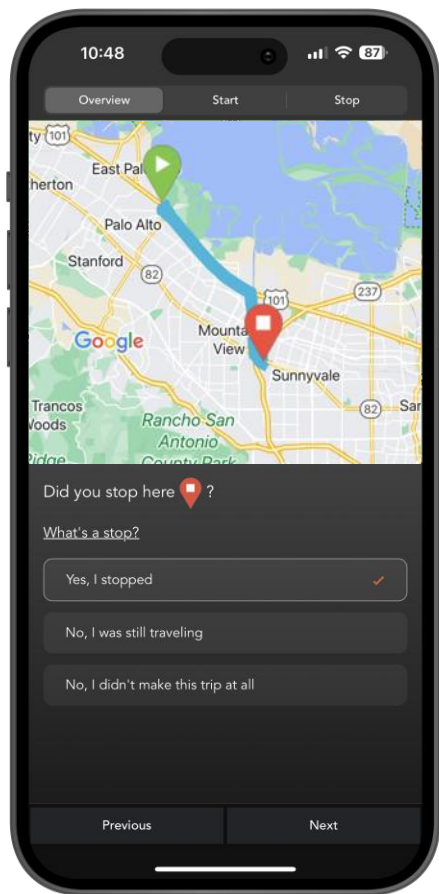
Planning Committee
January 9, 2026

Why MTC Conducts Its Own Data Collection

- MTC Travel Diary Survey
- MTC Transit Passenger Surveys
- Census and American Community Survey Data
- Employment Data
- Traffic/Transit Counts
- National Transit Database Data
- Other Data Sources



MTC's Travel Diary Survey: the Bay Area Travel Study



Smartphone App for Collecting
Travel Diaries (Credits: RSG Inc)

The 2023 survey:



715,000
mailings sent



8,000+ households
(15,000 adults)



92,000
travel days



373,000
Inferred trips



6.7M
location points

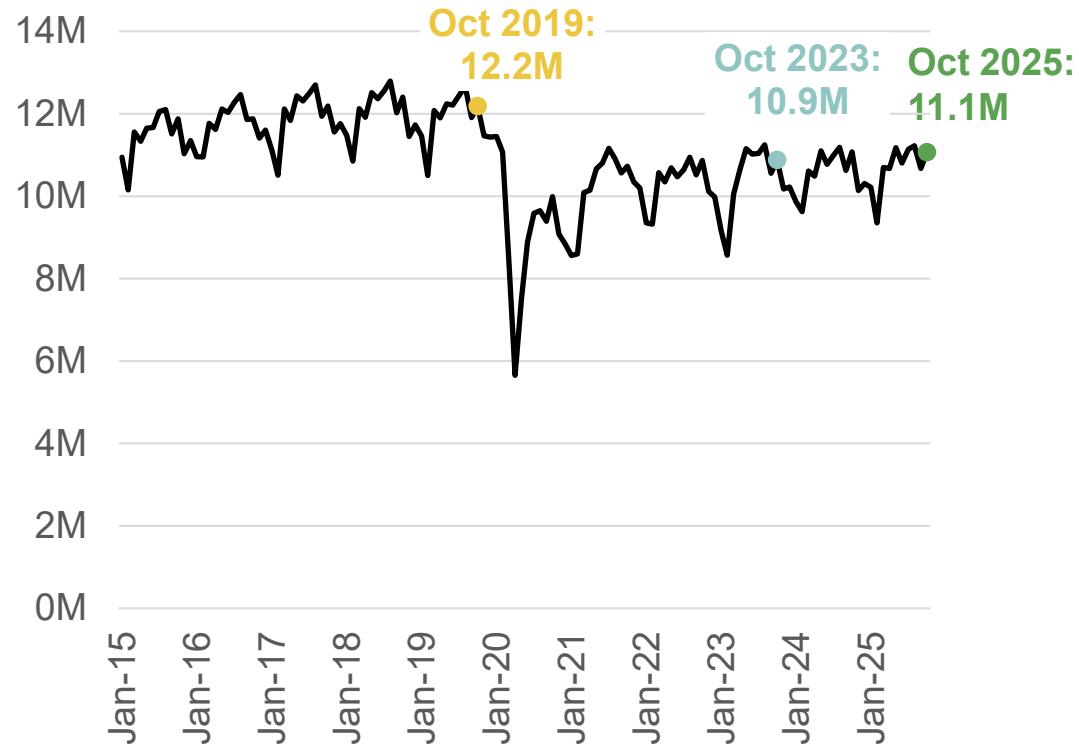
The 2019 survey: used a similar survey approach,
~9,800 adults participated (**≈2/3 of 2023**)

For both surveys, information collected:

- Trip purpose, mode(s)
- Detailed travel paths
- Travel party size/composition
- Parking, transit, and toll fees
- Travel substitution
- Household/person demographics, vehicle data

2025 Context: Transit Is Up Since 2023 But Below 2019 Levels

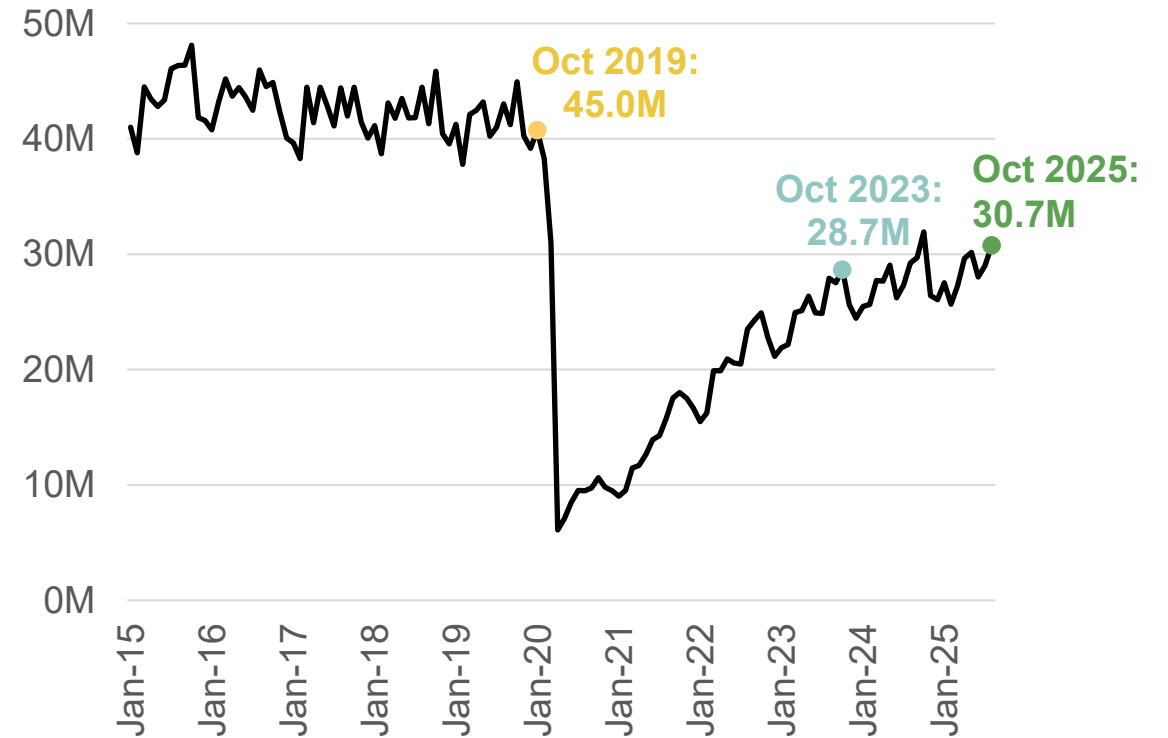
Monthly Bridge Toll Plaza Volumes



Source: MTC

Vehicles are counted each time they cross the toll booths at each bridge.
Include seven Bay Area toll bridges; excludes the Golden Gate Bridge.

Monthly Transit Boardings

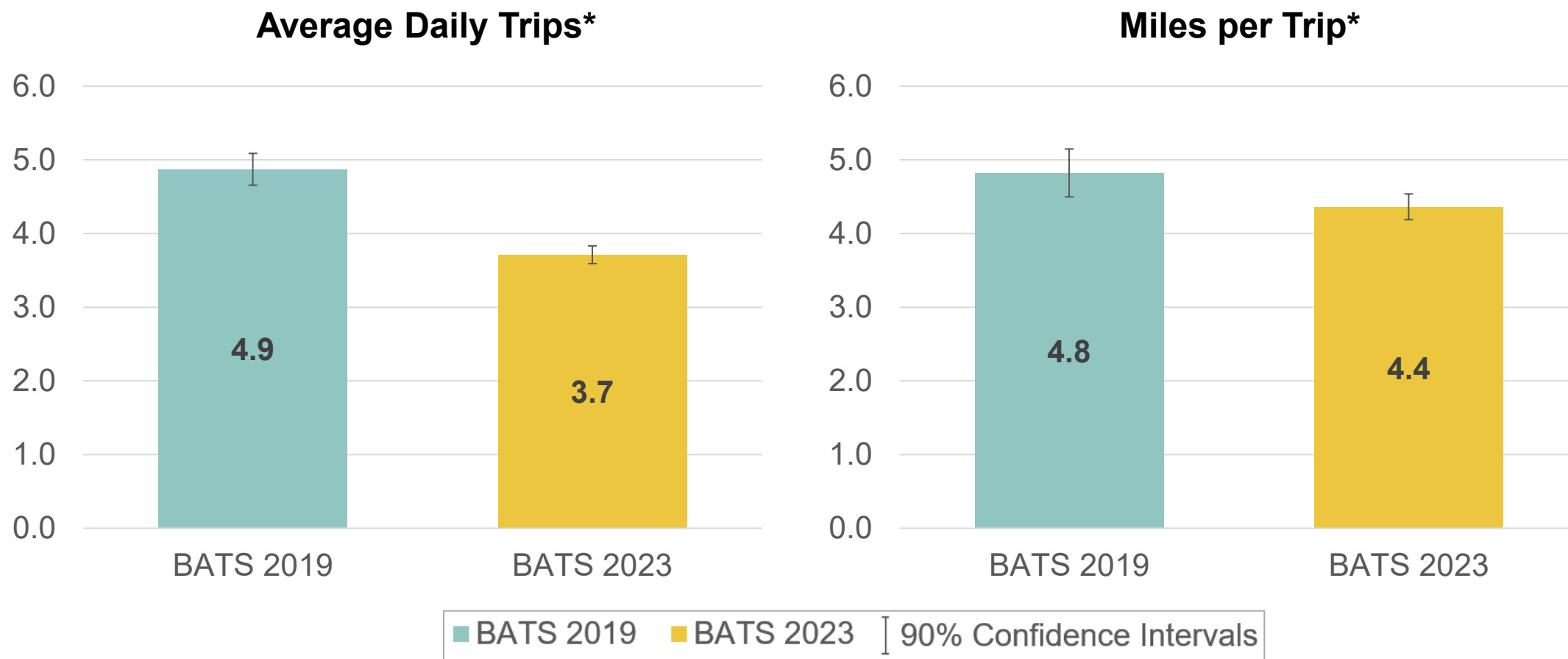


Source: National Transit Database

Includes 21 Bay Area Transit Agencies; excludes Union City Transit and Vacaville City Coach

Passengers are counted each time they board a transit vehicle.

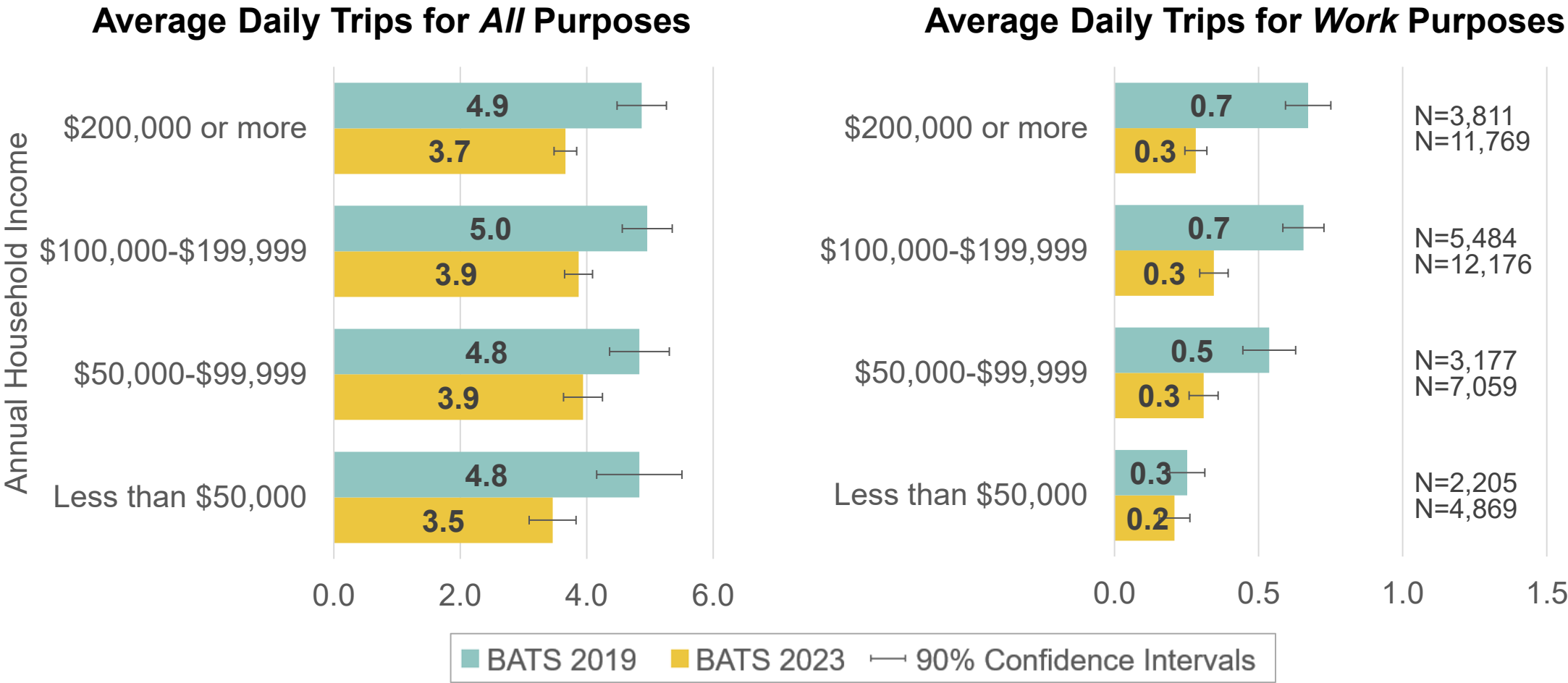
Daily Trip-Making Has Declined Between 2019 and 2023



* By Bay Area adult residents (18 or older) on a typical weekday (Monday to Thursday)

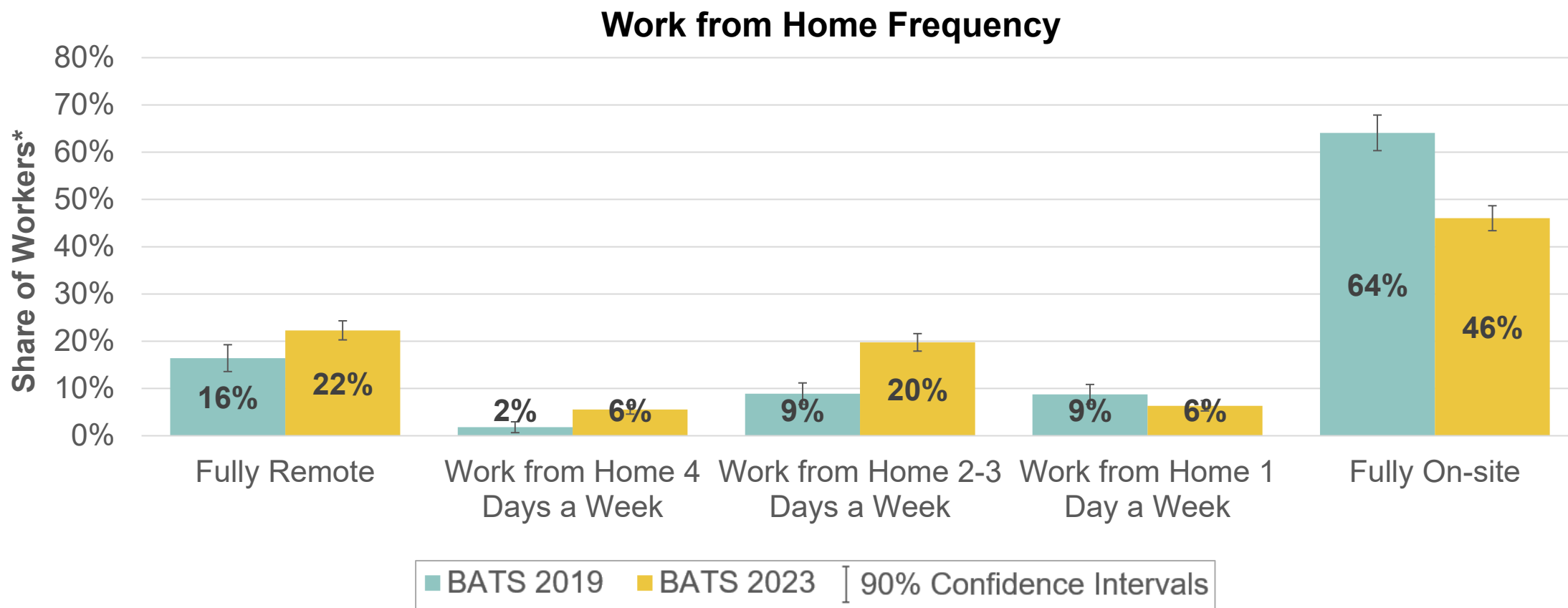
Sample Size: BATS 2019, N=16,362 person-days; BATS 2023, N=40,804 person-days

Trip-Making Declined Across All Income Groups



By Bay Area adult residents (18 or older) on a typical weekday (Monday to Thursday)

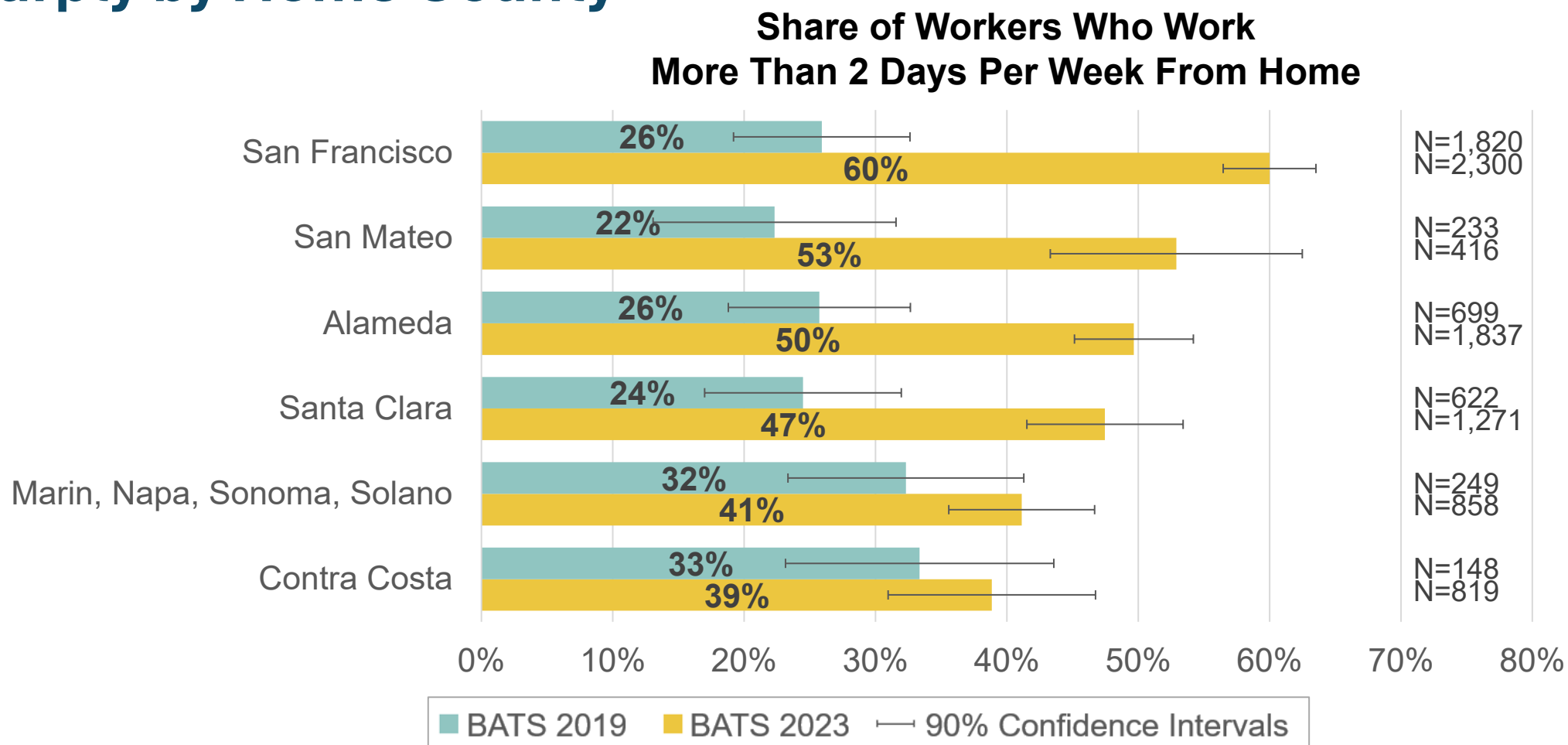
Remote and Hybrid Work Have Increased as Fully On-Site Work Has Declined



Sample Size: BATS 2019, N=3,571 workers; BATS 2023, N=6,218 workers

* Includes full-time, part-time, self-employed

Remote and Hybrid Work Growth Is Widespread, but Varies Sharply by Home County

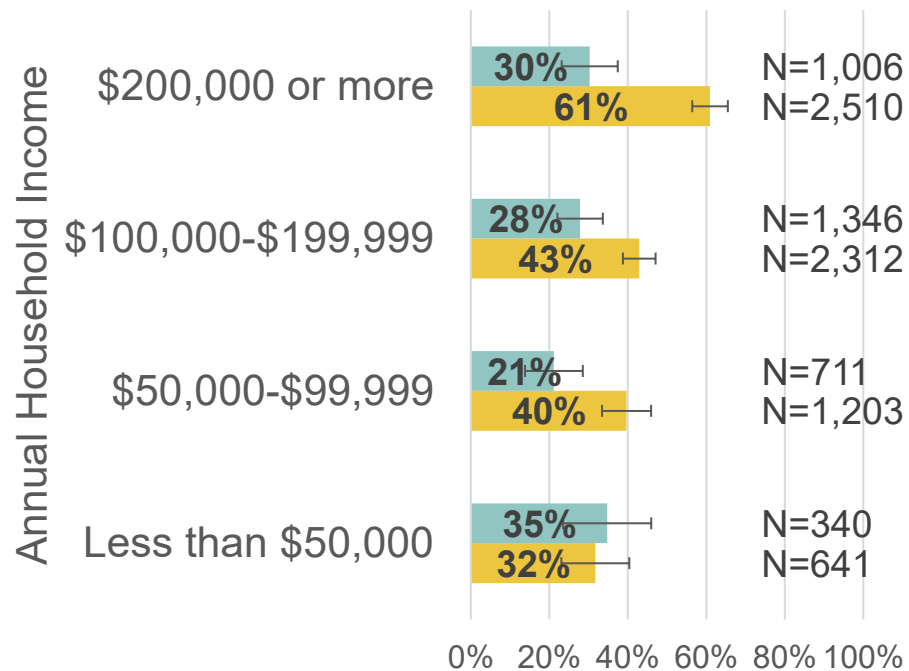


Workers includes full-time, part-time, and self-employed

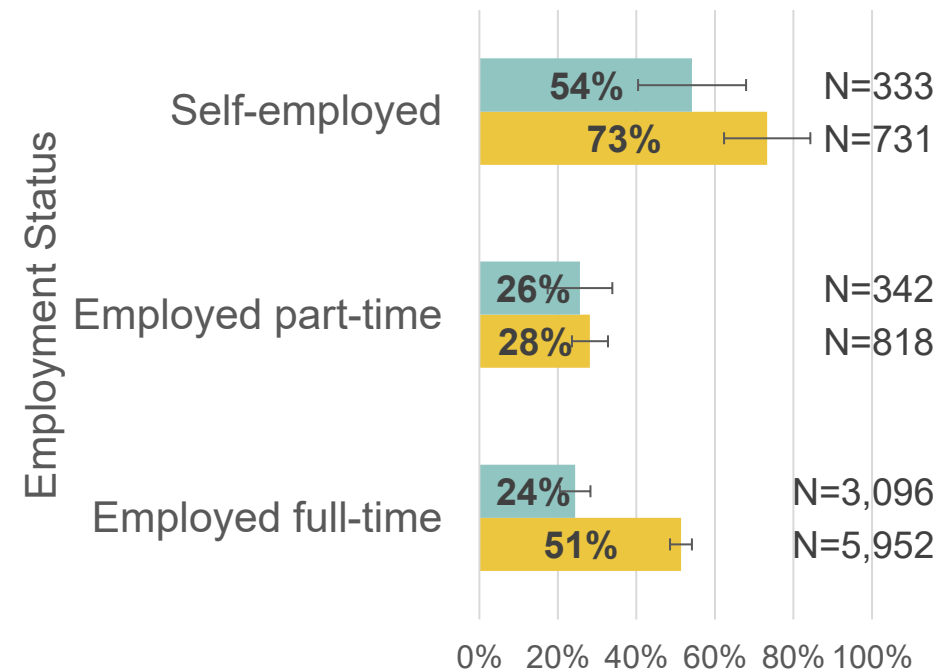
Error bars are larger on this slide than on others because focusing only on workers and subdividing by county reduces sample sizes

Remote and Hybrid Work Differs by Demographic Segment

Share of Workers Who Work
More Than 2 Days Per Week From Home,
by *Income*



Share of Workers Who Work
More Than 2 Days Per Week From Home,
by *Employment Status*

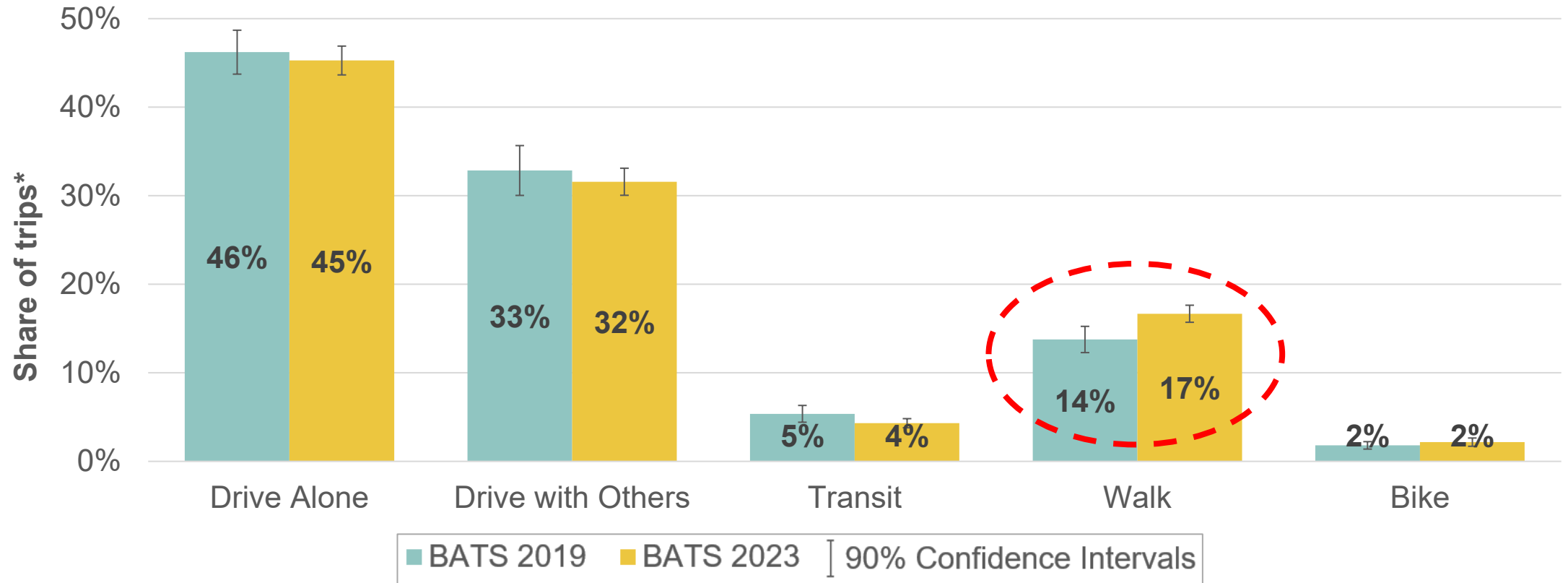


■ BATS 2019 ■ BATS 2023 — 90% Confidence Intervals

Workers includes full-time, part-time, and self-employed

Trip Mode Shares Have Been Broadly Stable

Mode Share for All Daily Trips

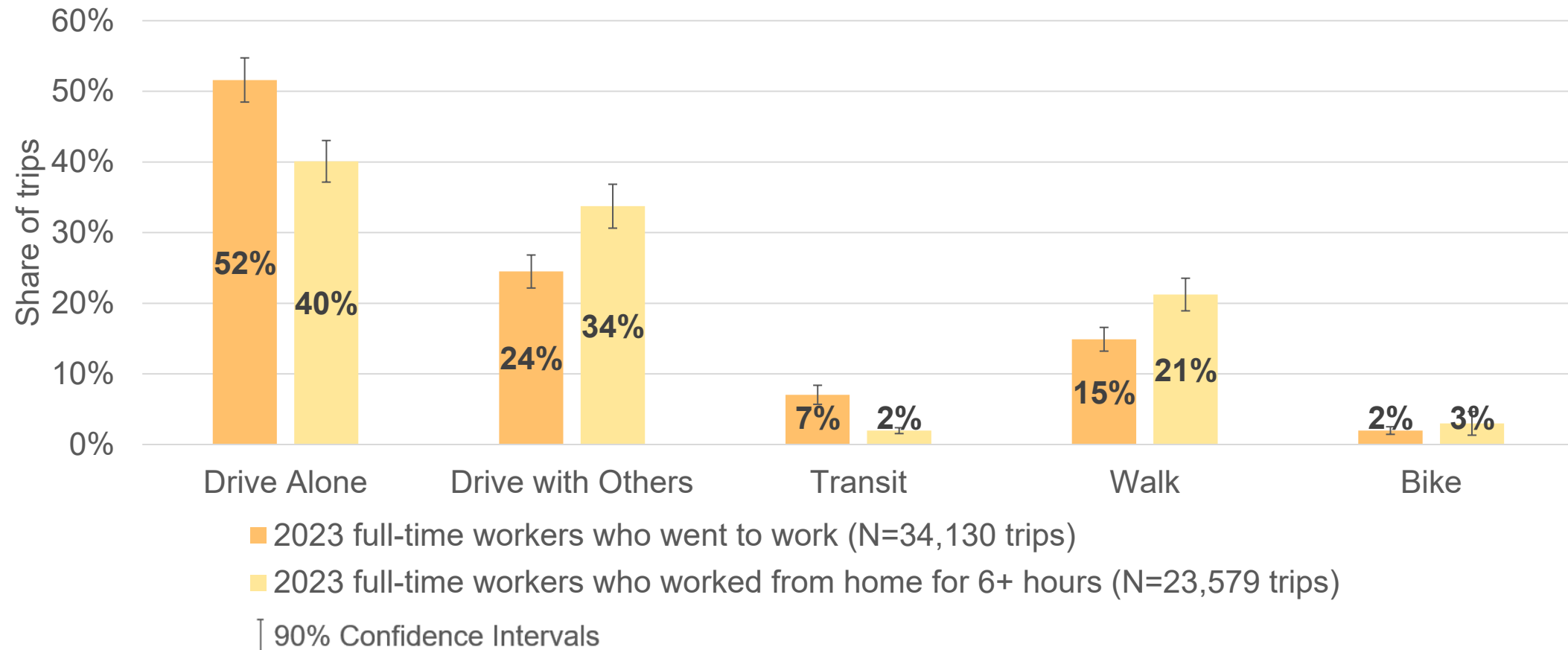


* By Bay Area adult residents (18 or older) on a typical weekday (Monday to Thursday)

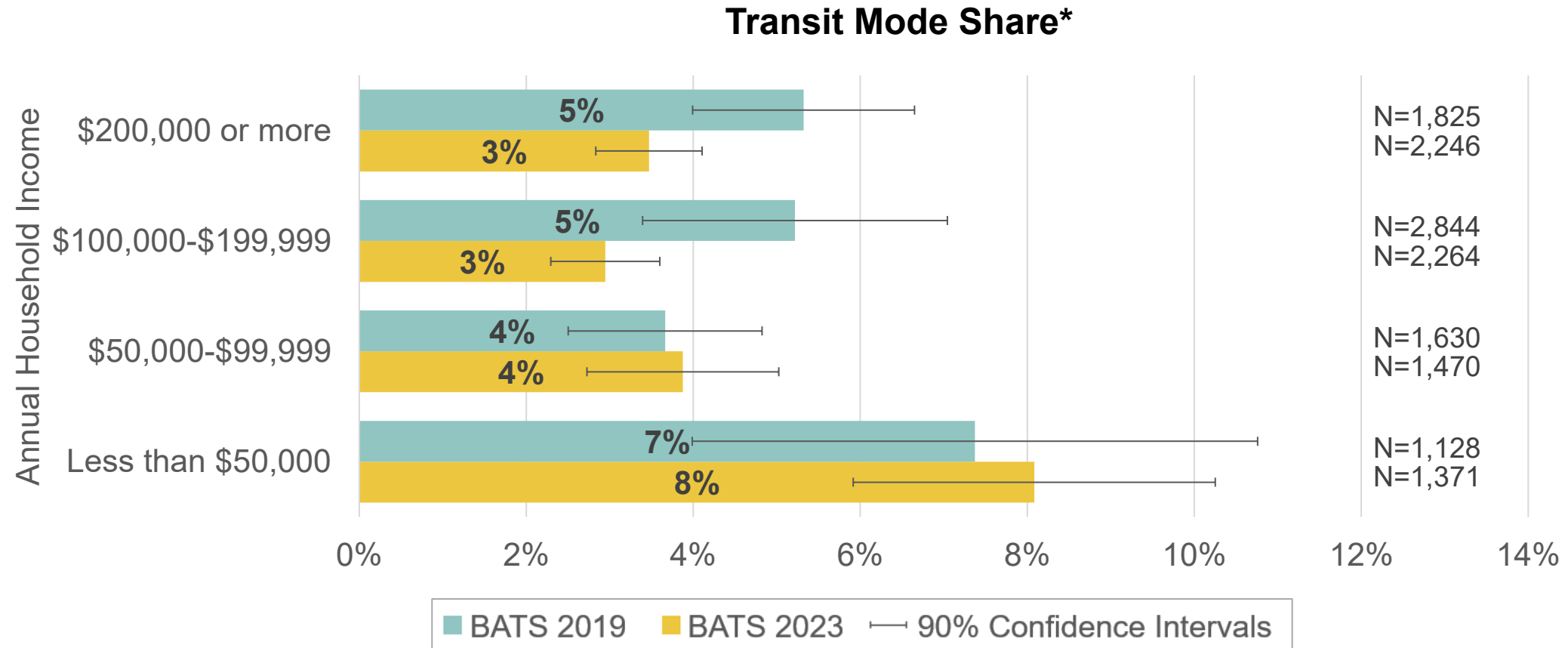
Sample Size: BATS 2019, N=68,184 trips; BATS 2023, N=140,847 trips

Mode Shares Differ Markedly Between Those Who Commuted and Those Who Worked from Home

Mode Share for Daily Trips, By Work Arrangement

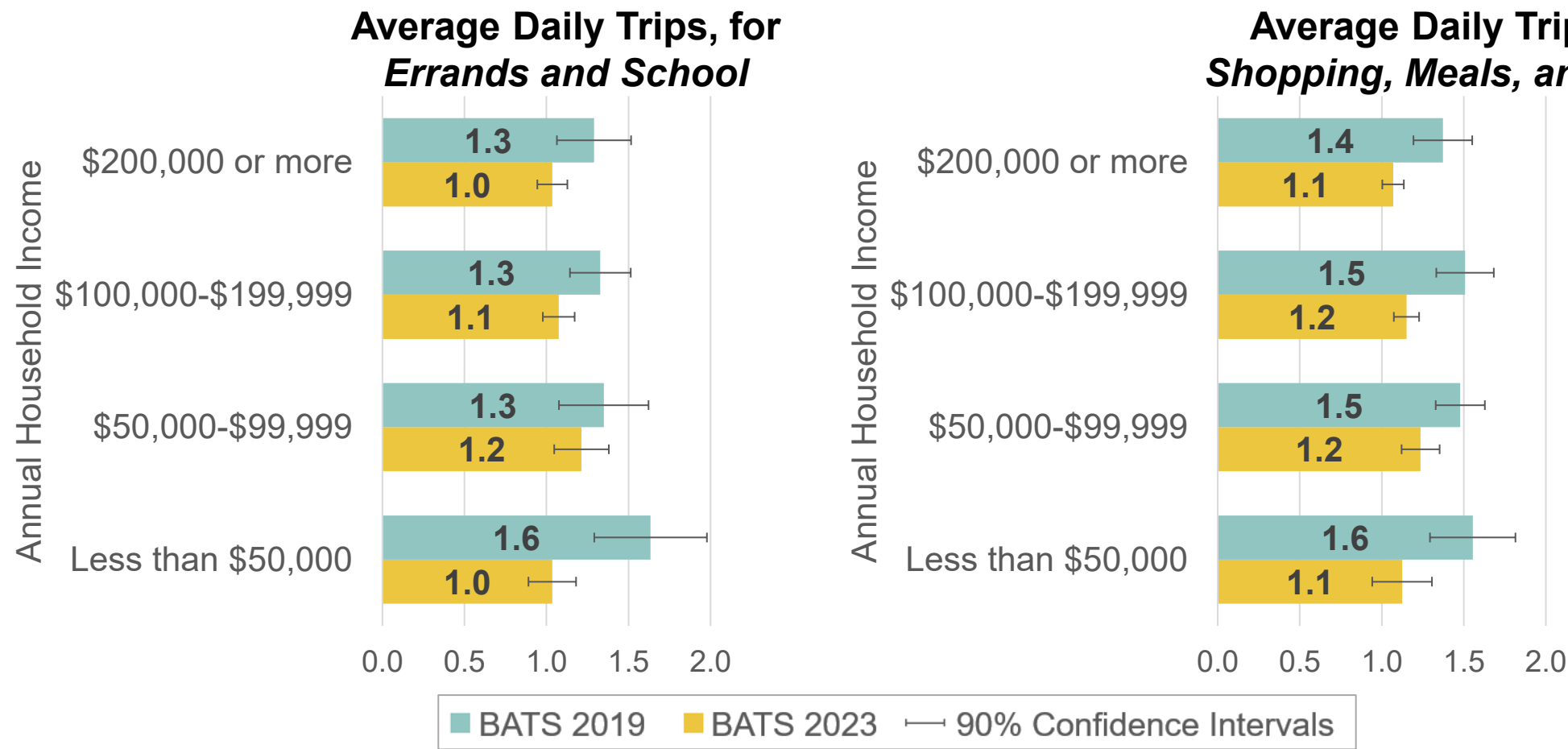


Transit Use Remains High Among Lower-Income Households



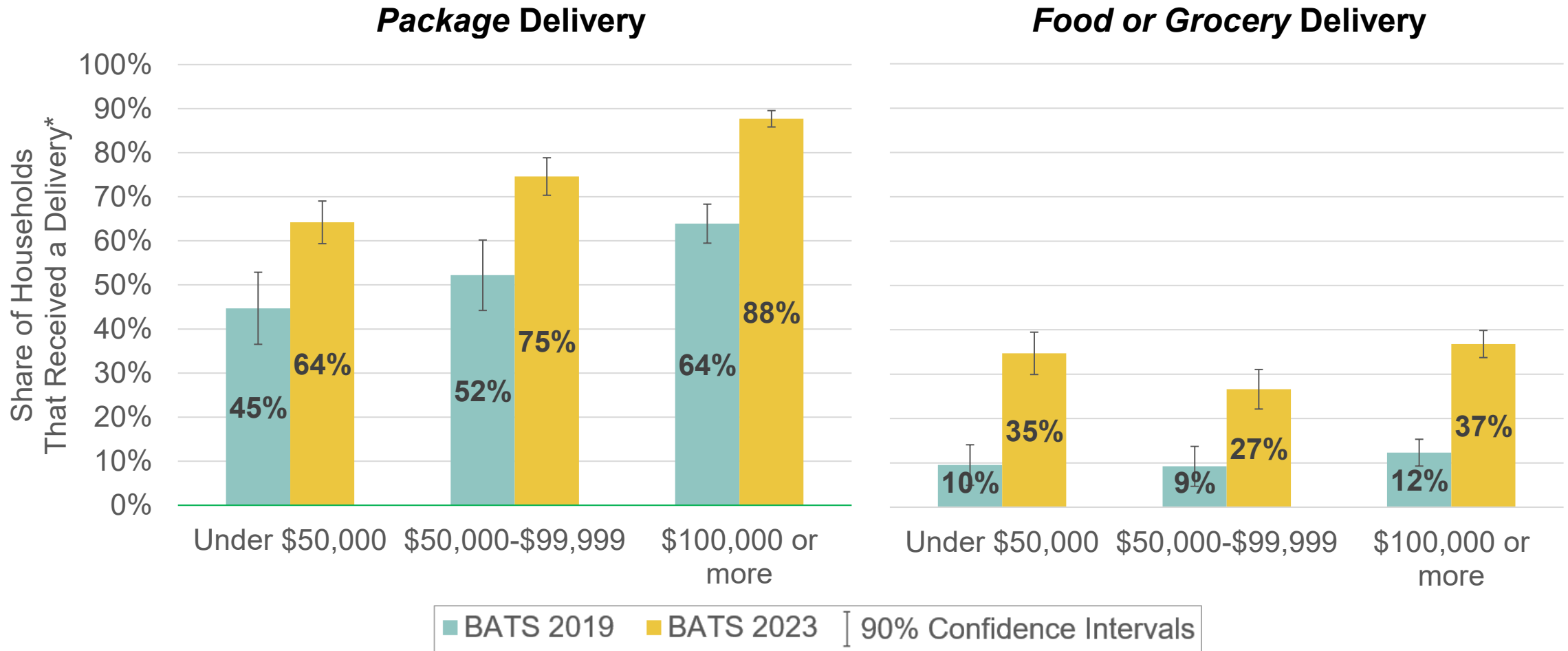
* Of Bay Area adult residents (18 or older) on a typical weekday (Monday to Thursday)
Error bars are larger on this slide than on others because of the focus on transit trips

Beyond Work Trips: Non-Work Travel Has Also Declined



* By Bay Area adult residents (18 or older) on a typical weekday (Monday to Thursday)

Delivery of Packages, Food, and Groceries Increased Significantly Between 2019 and 2023



*Received at least one delivery **on any day** from Monday through Thursday

Key Findings and Next Steps

In Summary: 2019 vs. 2023

1. Overall, Bay Area residents across all income groups are **taking fewer trips**.
2. Transit use is income-related, with **low-income residents relying on transit more than other groups and at similar levels pre- and post-pandemic**.
3. Work-from-home workers take **more walking trips than their commuting peers**, and their numbers have grown substantially.
4. The rapid shift toward **hybrid and remote work** has also occurred in sync with **robust increases in online shopping**.

Next Steps

- **Now:** Interactive dashboards under development
- **Spring 2026:** Next cycle of data collection via 2026 Bay Area Travel Study

Staff Contact:

Flavia Tsang

Email: ftsang@bayareametro.gov

<https://mtc.ca.gov/tools-resources/survey-program>