Routing Transit’s Transformation through Uncertain Times: Current Trends

October 27, 2021
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-200 to I-80
  -7%
- SR-29 SB
  Calistoga to Napa
  -9%

15%-30% Below 2019 Levels
- I-680 NB
  I-580 to Benicia
  -12%
- US-101 NB
  GGE to Santa Rosa
  -13%
- I-880 NB
  I-200 to I-80
  -24%
- SR-37 EB
  US-101 to I-80
  -28%

>30% Below 2019 Levels
- Dumbarton EB
  US-101 to I-80
  -57%

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
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.
Average Weekday Bridge Crossings, 2014-present

Tolls collected on the 7 state-owned toll bridges* in the Bay Area.

*Note: The Golden Gate Bridge Highway and Transportation District manages operations on the Golden Gate Bridge

Data source: Bay Area Toll Authority

Data are updated monthly.
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
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 ridership.

Source: NTD
Bay Area Transit Ridership

Ridership in the Bay Areas is slowly increasing but remains significantly below pre-COVID levels.

- Current recovery led by transit dependent riders
- Office commute lagging; uncertain recovery timeframe
Ridership & Service – Status

Ridership trends vary by service type illustrating shifts in transit demand. Commute and regional services experience greater ridership losses as compared to local services more likely to serve essential workers.

- **Caltrain**
  - Ridership: -87%
  - Increased weekday and weekend service

- **BART**
  - Ridership: -78%
  - Returned to near pre-COVID weekday service

- **SMART/WETA**
  - Ridership: -62%
  - WETA returned to near pre-COVID service; SMART operating reduced levels

- **Golden Gate**
  - Ridership: -72%
  - 2/3 of routes suspended and others modified

- **VTA**
  - Ridership: -63%
  - Light rail service restored in late August

- **SFMTA**
  - Ridership: -57%
  - Increased weekday and weekend service

- **AC Transit**
  - Ridership: -55%
  - Select Transbay service restored

- **Small Ops Bus Ridership**
  - Ridership: -54%
  - Service levels vary

- **SamTrans**
  - Ridership: -47%
  - Operating modified schedule, similar to pre-COVID

Combined annual revenue loss due to decreased ridership >$700M
Service Levels – All Operators

Stimulus funds have been critical in allowing operators to maintain some level of service despite significant revenue losses from traditional sources.

Most revenue service today supports transit dependent riders and essential services.