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Authors
Taylor, Brian D.
Blumenberg, Evelyn
Wasserman, Jacob L
et al.

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Institute of Transportation Studies
UNIVERSITY OF CALIFORNIA

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Brian D. Taylor, Evelyn Blumenberg, Jacob Wasserman, Mark Garrett

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Introduction

Public transit ridership has been slipping nationally and in California since 2014. The San Francisco Bay Area, with the highest share of transit trips in the state, had until recently resisted those trends, especially compared to Greater Los Angeles. However, in 2017 and 2018 the region lost over 27 million annual transit boardings, over 5 percent of all transit trips, despite a booming economy and service increases. The steepest ridership losses have come on buses, at off-peak times, on weekends, in non-commute directions, on outlying lines, and on operators that do not serve the region's core employment clusters.

Amidst falling Bay Area ridership, transit trips in the region are becoming much more commute-focused. Ridership at peak hours has grown dramatically, especially into and out of downtown San Francisco, resulting in severe overcrowding on Bay Area Rapid Transit (BART). Researchers at the UCLA Institute of Transportation Studies examined recent Bay Area ridership trends for the Metropolitan Transportation Commission in order to identify both possible causes of falling transit use as well as potential policy responses. The key dimensions of shifting Bay Area transit use are summarized below.

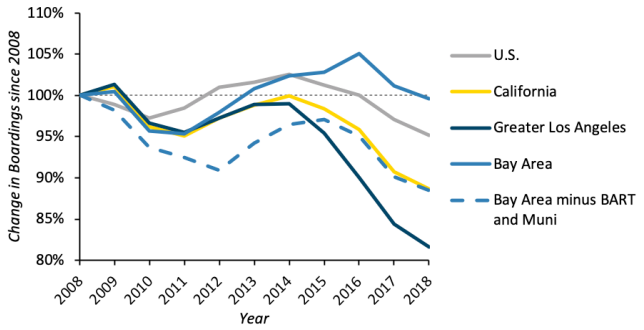
Key Findings

Transit is losing riders overall — especially off-peak riders — but drawing more commuters from non-traditional users. Despite population growth, Bay Area residents are taking fewer transit trips on average. From 2008 to 2018, annual ridership fell from 72 trips per person to just 65. Surprisingly, residents of poorer households and others without private vehicles are making fewer trips by transit, while wealthier individuals and those with high levels of vehicle access are making more transit trips. These trends help explain why Bay Area transit operators are seeing an upsurge in commuting (i.e. journeys to and from work) and a dramatic decline in off-peak trips.

The growing job-housing imbalance in the Bay Area is depressing transit ridership. While more people are living and/or working in areas with good transit access to jobs, these areas are growing less affordable, as the population continues to disperse to the outer reaches of the metropolitan area, where both transit service and transit connections to employment are less. Indeed, more than three in five Bay Area workers both live *and* work in neighborhoods with relatively poor transit access to employment. Also, fewer Bay Area residents both live and work in the same city; this is even true in fast-growing job-rich locations like San Francisco, Oakland, Berkeley, and San José. A majority (60%) of Bay Area cities have more resident workers than jobs while a majority (60%) of jobs are in cities with more jobs than resident workers. Consequently, commute distances for all Bay Area workers have increased.

Ridehail may be substituting for transit, while other commonly suggested factors are not major causes of the ridership decline. There is strong circumstantial evidence that app-based ridehail services (like Lyft and Uber) are increasingly substituting for transit, particularly for evening and weekend trips. However, the lack of publicly-available

Putting Bay Area Transit Ridership Trends in Context



Data source: FTA, 2019

data on ridehail trips prevents more definite conclusions. Meanwhile, the evidence suggests that falling ridership is not substantively due to changes in transit service, passenger satisfaction factors, fares, gasoline prices, auto access, or private employer shuttles. Expanded access to driver's licenses may be discouraging some transit use by undocumented residents, but the overall impact is likely relatively small.

Policy Recommendations

Reversing the decline in transit use in the Bay Area will be difficult since it does not appear to be caused by factors within the control of transit operators. Addressing factors beyond transit itself, like the region's jobs-housing imbalance, affordable housing crisis, and ridehail boom will be the key to restoring ridership, especially off-peak trips.

To do this, regional policymakers should address the following:

- *Transit service improvements:* improve rapid bus/rail services in dense areas with dedicated rights of way; invest in short-term improvements to peak capacity; in the long term, add more housing near job centers and improve transit services that link them
- *Demand-based fares:* consider variable peak-/off-peak fares to both encourage off-peak travel and reduce peak crowding
- *Regional integration and seamless mobility:* better integrate trip planning and fare payment across jurisdictions and service providers; investigate new mobility pilots to improve first/last-mile access
- *Data on private-sector transportation:* collect and share robust data from private new mobility and micromobility operators on an ongoing basis to enable better multimodal planning
- *Better manage private vehicle travel:* investigate and pilot-test road- and parking-pricing programs to both increase transit speeds and reliability and to make transit a more competitive travel option
- *Land use near transit:* broaden the concept of transit-oriented development to include land-use planning strategies that increase employment and housing densities near one another; consider financial incentives to promote such strategies; increase housing and employment thresholds as a funding requirement for transit projects
- *Affordable housing and transit:* increase the supply of affordable housing near jobs, accompanied by well-designed affordability and anti-displacement policies.

Figure Data Sources

FTA. (2019, December 16). The National Transit Database (NTD). *Federal Transit Administration*. Retrieved January 7, 2020, from https://www.transit.dot.gov/ntd.

This policy brief is drawn from the UCLA Institute of Transportation Studies report "What's Behind Recent Transit Ridership Trends in the Bay Area?" To access this report and additional policy briefs on UCLA ITS transit trends research, go to www.its.ucla.edu. This project was funded by the Metropolitan Transportation Commission, the UC ITS Statewide Transportation Research Program, and the California Department of Transportation.

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