



# Memorandum

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**DATE:** March 7, 2021

**TO:** Planning, Policy and Legislation Committee

**FROM:** Cathleen Sullivan, Director of Planning  
Chris G. Marks, Associate Transportation Planner  
Shannon McCarthy, Associate Transportation Planner

**SUBJECT:** 2021 Multimodal Performance Report

## Recommendation

This item is to provide the Commission with an update on the Congestion Management Program 2021 Multimodal Performance Report. This item is for information only.

## Summary

Each year, the Alameda County Transportation Commission (Alameda CTC) prepares a summary of the state of the transportation system within Alameda County, tracking a series of key performance metrics for the countywide multimodal transportation system. The purpose of this report is to elucidate emerging trends which shape policy and decision-making throughout the agency.

Through much of the last decade the annual performance report reflected gradual, multi-year shifts, across a variety of important indicators. However, the arrival of the COVID-19 pandemic quickly and radically changed transportation in Alameda County such that many of the standard instruments of measurement used for the performance report would fail to capture the current state of the system. Additionally, key data from the United States Census Bureau’s American Community Survey will not be released due to insufficient sampling. Alameda CTC uses these data to better understand detailed demographic information including age and income as well as commute times and mode splits.

The 2021 report, included as Attachment A, was therefore developed using a new methodology in order to shed light on the transportation system with a more real-time analysis of available metrics focused on changes over the past year as the nature of the pandemic and its impacts have changed.

Key findings from this report include:

- Alameda County's population declined for the first time in 2021, losing about 10,000 residents and falling to 1.67 million. Natural growth slowed, foreign immigration was at its lowest since at least the 1990s, and domestic migration out of Alameda County nearly doubled.
- Alameda County is home to about 21 percent of the region's population and a similar share of the housing supply. New housing development has outpaced other counties in the region between 2016 and 2020, as Alameda County has approved about 28 percent of total new units in the region, about 35,000 of 128,000 total units. However, just over ten percent of these units are affordable, well below the Regional Housing Needs Assessment goal of 37.5 percent. In 2019, almost half of Alameda County renters were rent-burdened.
- The county added about 40,000 jobs in the last year, and unemployment fell to five percent. A full recovery is not complete as unemployment is still above the pre-pandemic low of less than three percent.
- Transit ridership is down between 50 and 80 percent for all operators in Alameda County, compared to 2019. At the onset of the pandemic transit ridership plummeted, but in the last year, it has started to bounce back. Between October 2020 and October 2021 BART, LAVTA, Capital Corridor and ACE ridership each at least doubled, while SF Bay Ferry quadrupled. AC Transit ridership also increased about 26 percent; AC Transit is currently carrying the highest percentage of pre-pandemic ridership of any operator in the region. Weekend and off-peak ridership are recovering faster for some operators.
- Prior to the pandemic, 90 percent of Bay Area workplaces had employees commute to physical offices at least four days per week. That changed significantly during the pandemic, and in April 2021 almost three quarters of workers did not travel to their workplace at all. However, over 2021, workers started to return to the office. By December 2021, only 28 percent did not travel to work at all, and just over half commute at least three days a week. Most employers expect a hybrid work pattern, with approximately three days in the office. BART ridership increases have tracked closely with workers returning to the office.
- Total collisions for all modes (auto, bike, pedestrian, etc.) fell about 26 percent in 2020 and most severe collisions fell 22 percent. However, fatal collisions increased sharply in Alameda County and statewide. Speeding remains the most common factor in all collisions. Collision data for 2021 in Alameda County is not yet available.
- Pedestrian collisions increased by eight percent in 2020, compared to 2019, while fatal and severe collisions remained flat. Bike collisions fell 18 percent and fatal and severe collisions fell 34 percent—to the lowest level since 2006. The share of total collisions involving bicycles and pedestrians increased from 16 percent in 2019 to 21 percent in 2020—the highest level in almost a decade.

- Bikeshare trips dropped 64 percent in Alameda County between 2019 and 2021, although there was an encouraging increase in trips in late 2021. Vandalism has been a persistent issue through the pandemic. Scootershare trips in Oakland also fell 76 percent and have continued to fall through 2020 and 2021.

**Fiscal Impact:** There is no fiscal impact. This is an information item only.

**Attachment:**

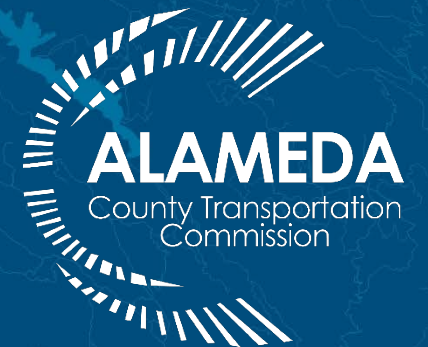
- A. [2021 Multimodal Performance Report: Transportation and COVID-19 in Alameda County](#)

# 2021 Performance Report

Alameda County Transportation Commission

Chris G. Marks, Shannon McCarthy

March 2022



# 2021 Performance Report

- 1 Population and Economy
- 2 Transit Recovery
- 3 VMT and Congestion
- 4 Safety
- 5 Goods Movement



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# About this Report

- Purpose of annual reporting:
  - Elucidate recent trends and highlight changes
  - Provide data to inform agency policies and decision-making
  - Meets legislative requirement
- Methodologies adapted for 2021:
  - No 2020 1-year ACS data available
  - Congestion and Active Transportation Monitoring ongoing



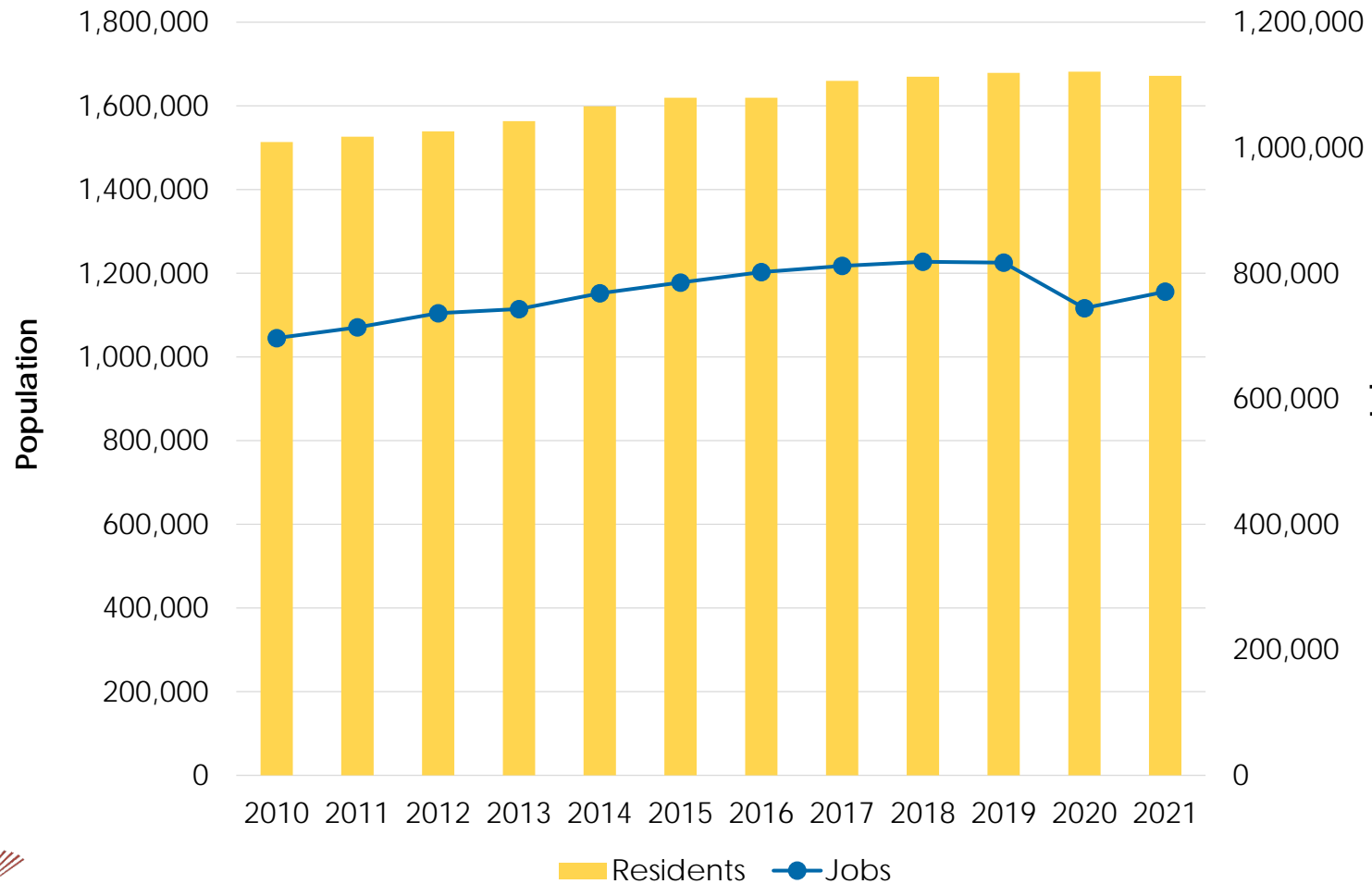
# 1

## Population and Economy: Key Findings

- Total population declined, but broad economic recovery
- Affordable units trail permitted housing
- Hybrid return to workplaces predicted

# First Year of Population Decline

## Annual Population and Employment



**Total Jobs**  
770,000

**Unemployment Rate**  
5.4%

**Total Population**  
1.67M

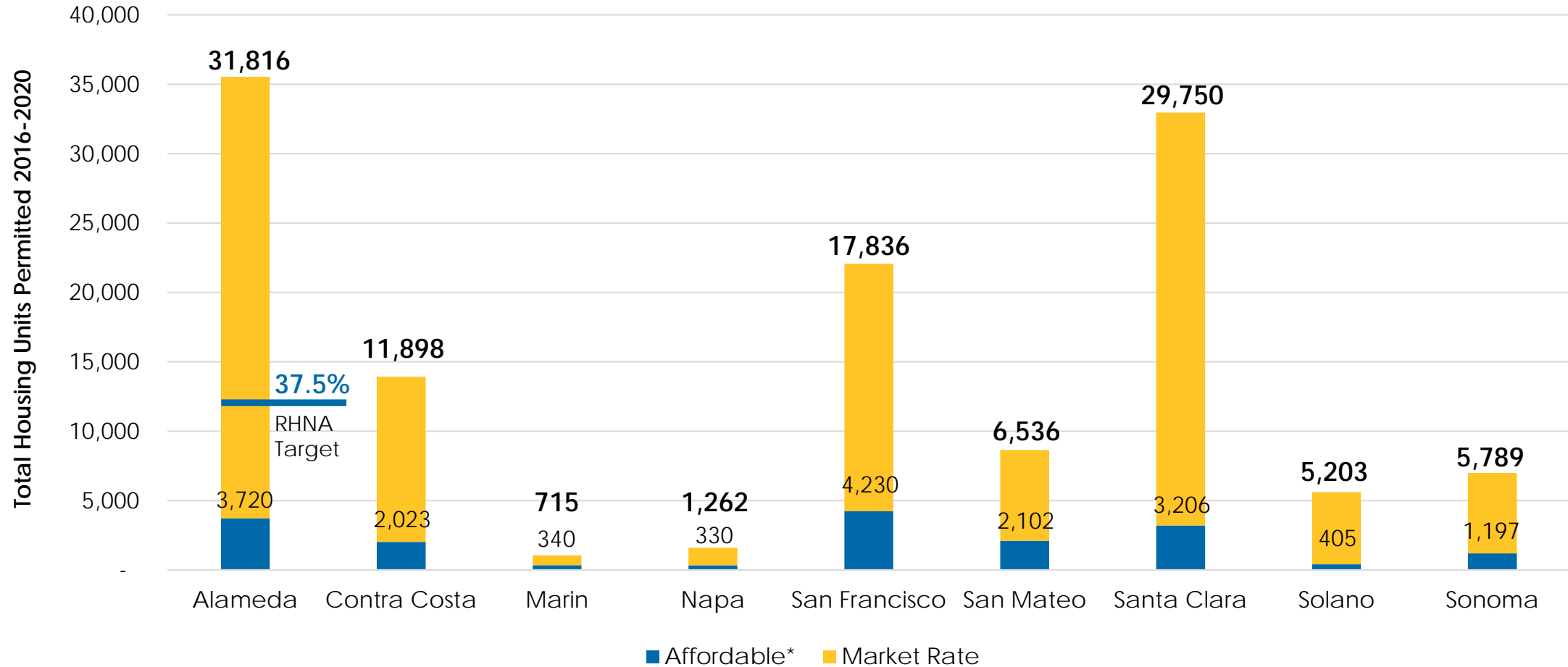


Sources: BLS QCEW (jobs) & DOF (residents), Alameda County 2010-2021



# Leading Permitted Housing

Housing Units Permitted 2016 – 2020



\*Affordable to very-low or low-income households (earning <80% of Area Median Income)

Source: California HCD, 2016-2020 Annual Progress Reports

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# Employers Expect Hybrid Return

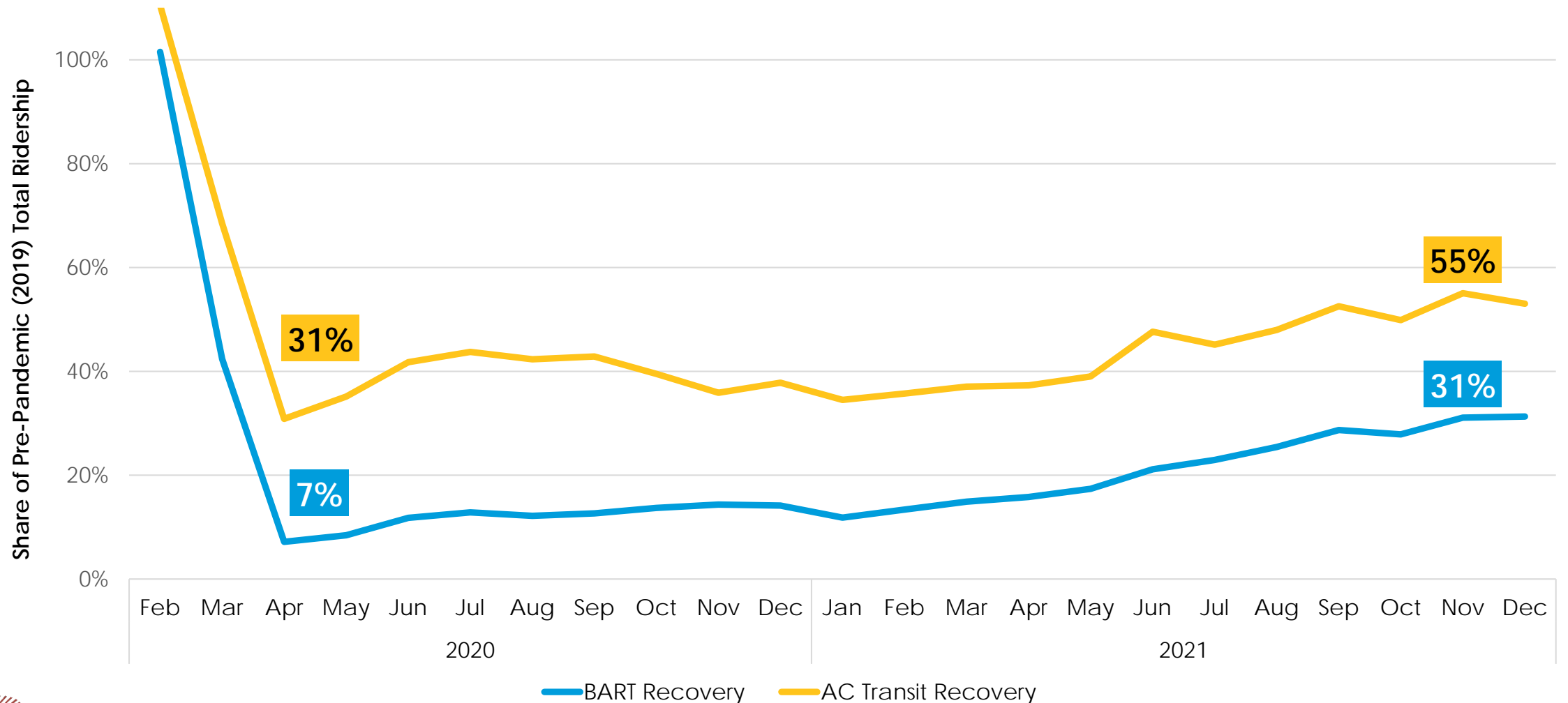
- **2019:** More than 90% of workers in office 4-5 days per week
- **2020:** Many workers shift fully remote
- **2021:** Bay Area lags behind all other metro areas in return to the office, many still fully remote
- **Near-future:** Many employers expect 3-day (in office) hybrid schedule

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## Transit Recovery: Key Findings

- Total ridership down, but recovering
- Rising operating costs

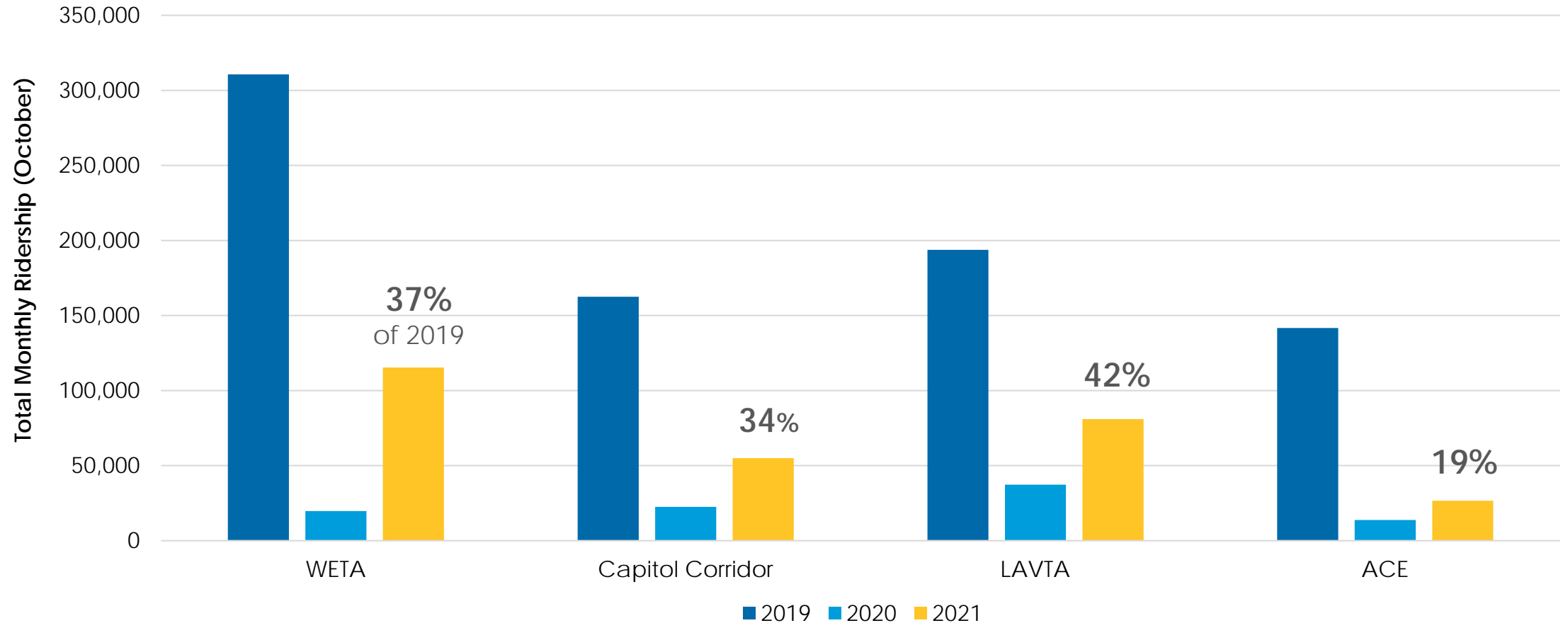
# Transit Ridership Recovering Slowly



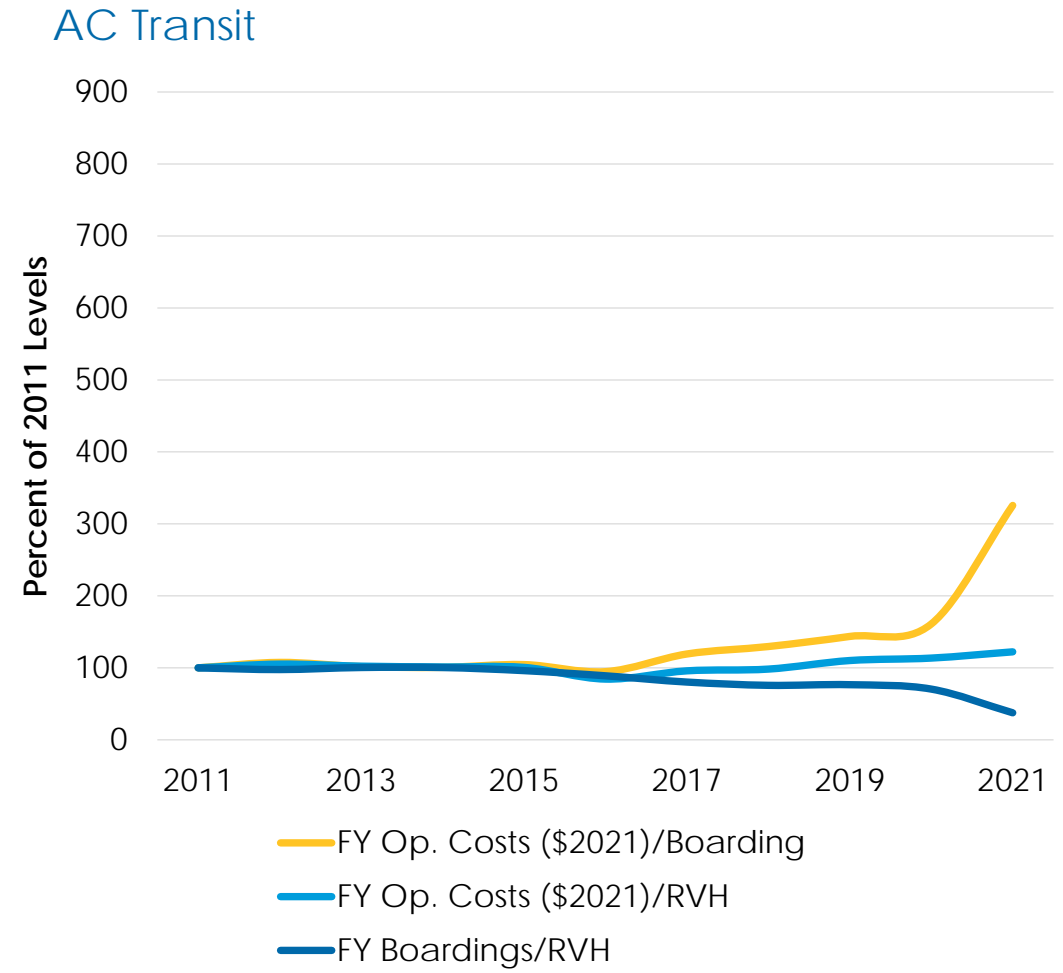
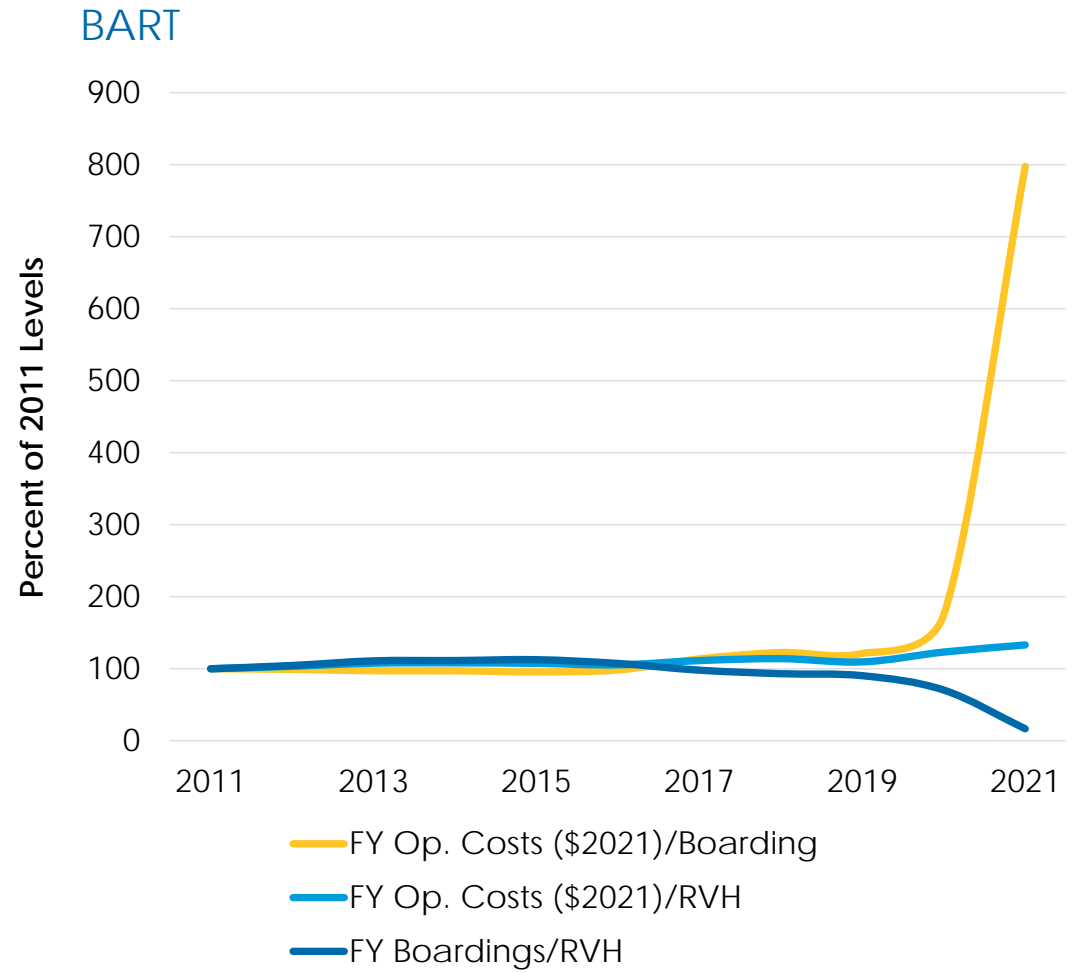
Source: Transit Agency Provisional Performance Reporting

# Strong Recovery Relative to 2020

Total Monthly Ridership For Smaller Transit Operators



# Spike in Operating Cost per Boarding



Source: BART, AC Transit NTD FY2011-2020, Provisional 2021

# Looking Ahead

- Investments in bus priority are paying off: East Bay BRT/Tempo exceeding pre-pandemic ridership
- Regional efforts underway





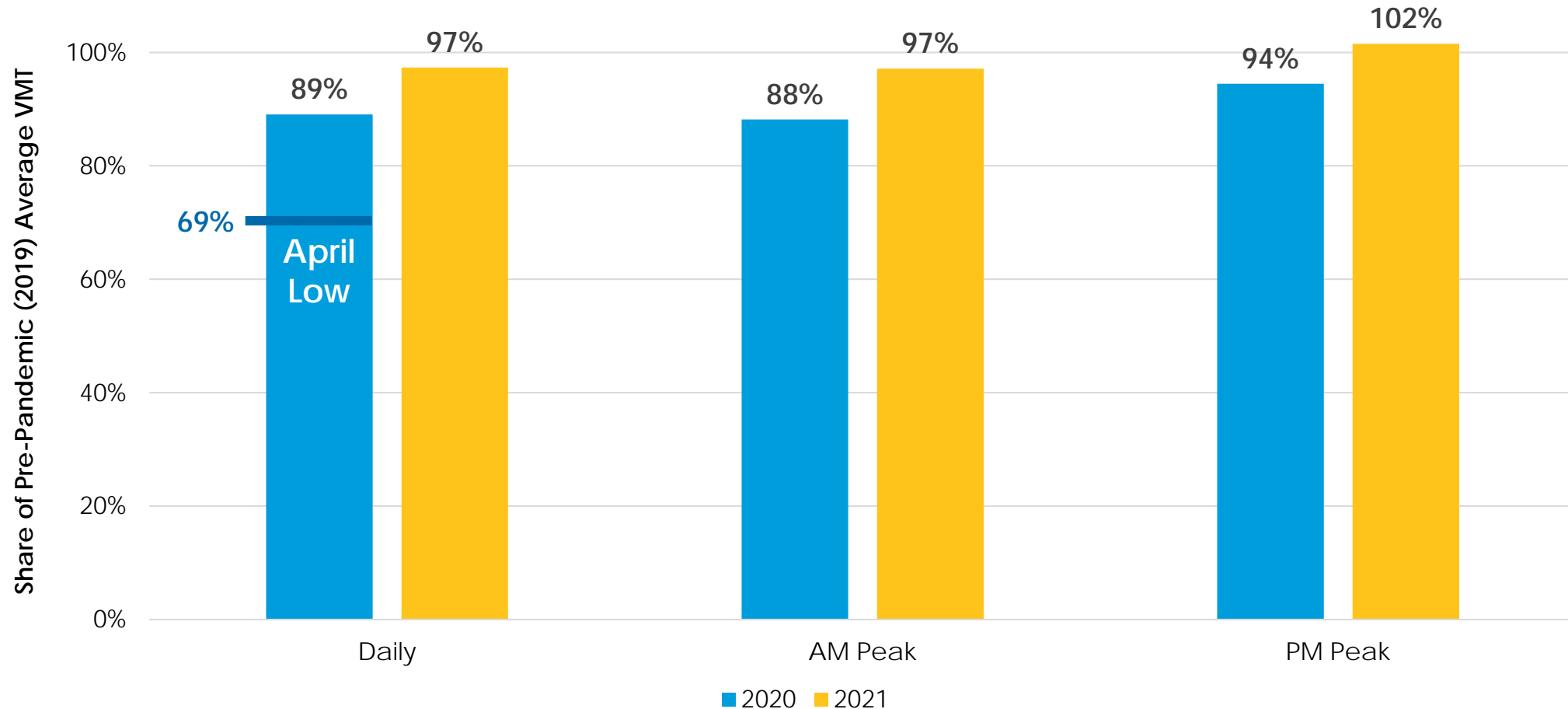
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## VMT and Congestion: Key Findings

- Total travel nearing pre-pandemic levels
- Congestion returning to afternoon commute
- Bridge volumes down

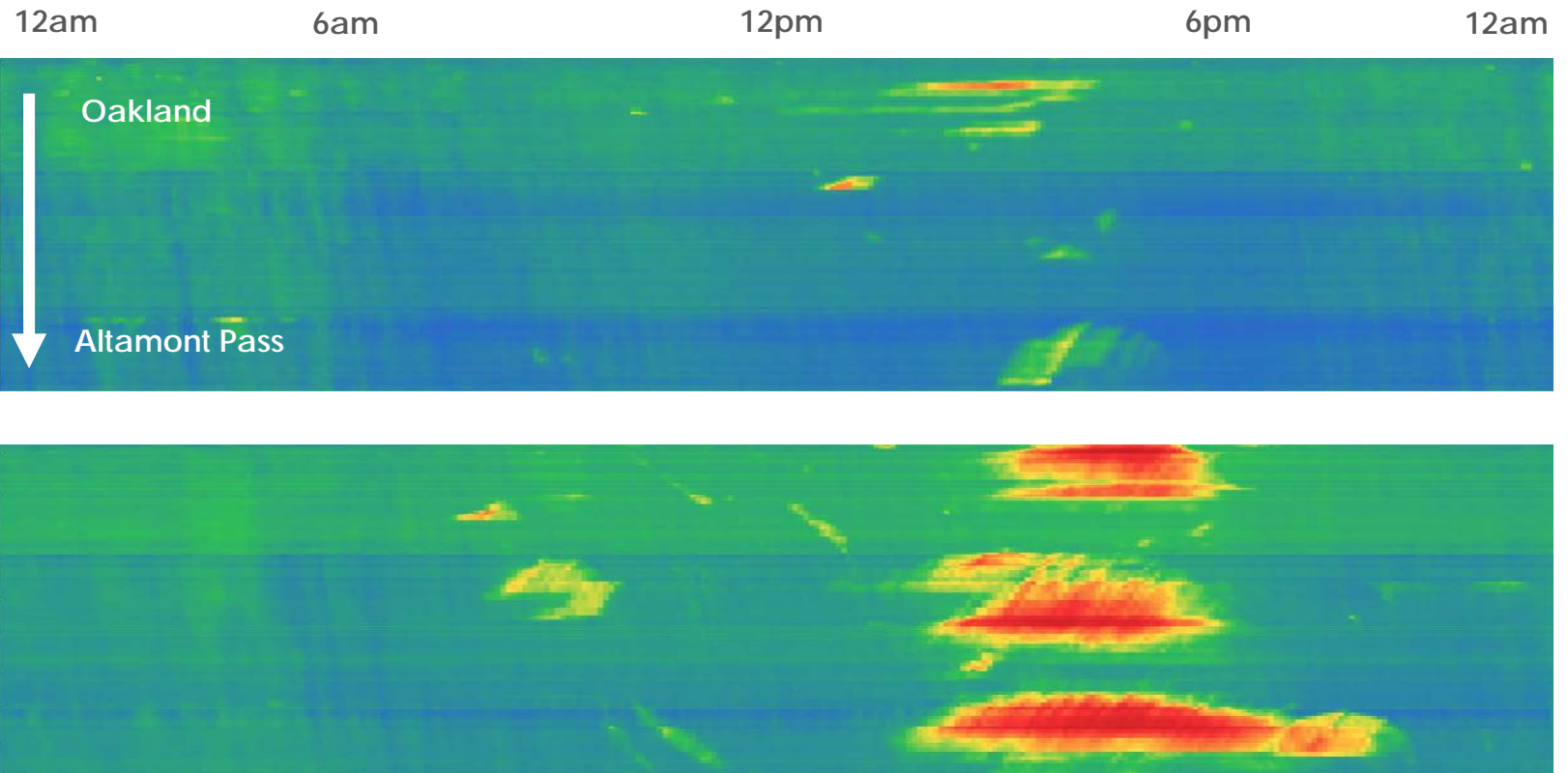
# VMT Mostly Recovered

Countywide Average Vehicle-Miles Traveled



# Congestion Returning

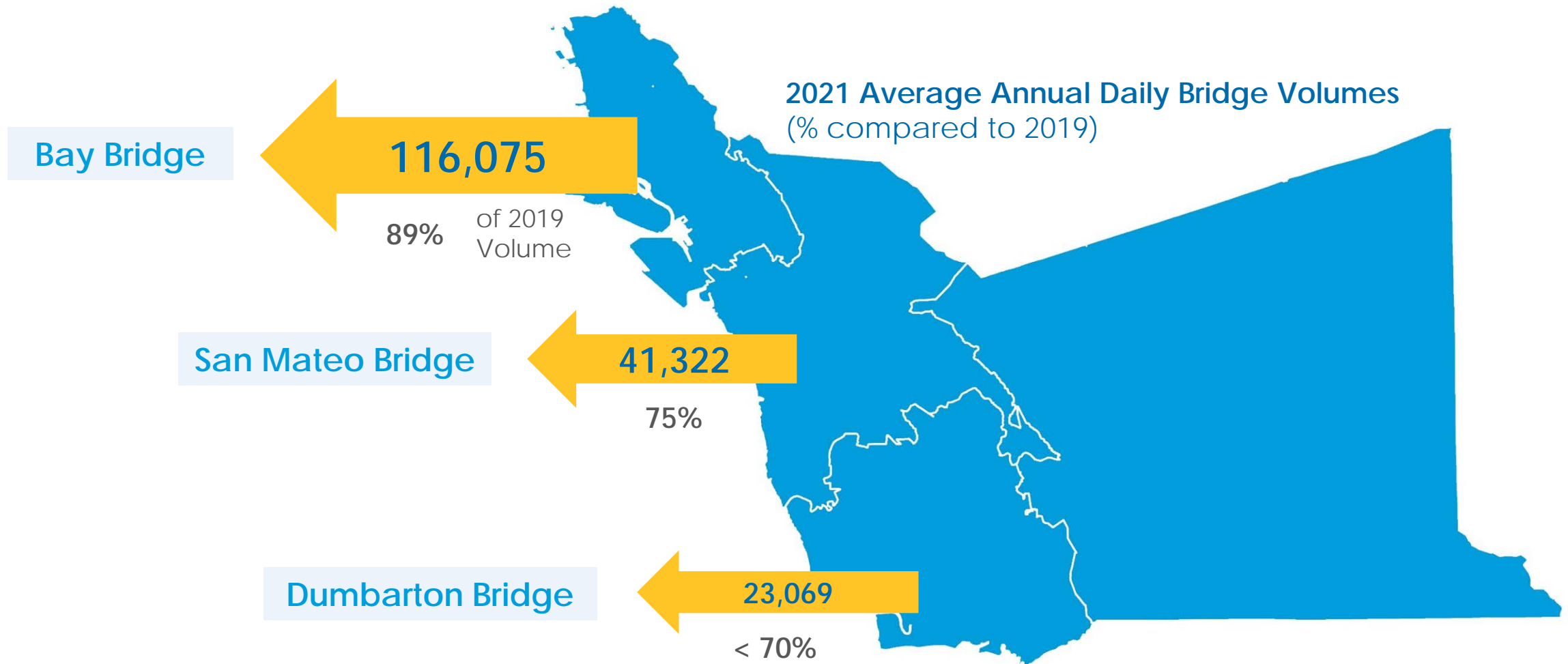
I-580 East Bound Speed



April 2020

October 2021

# Bridge Volumes Lagging



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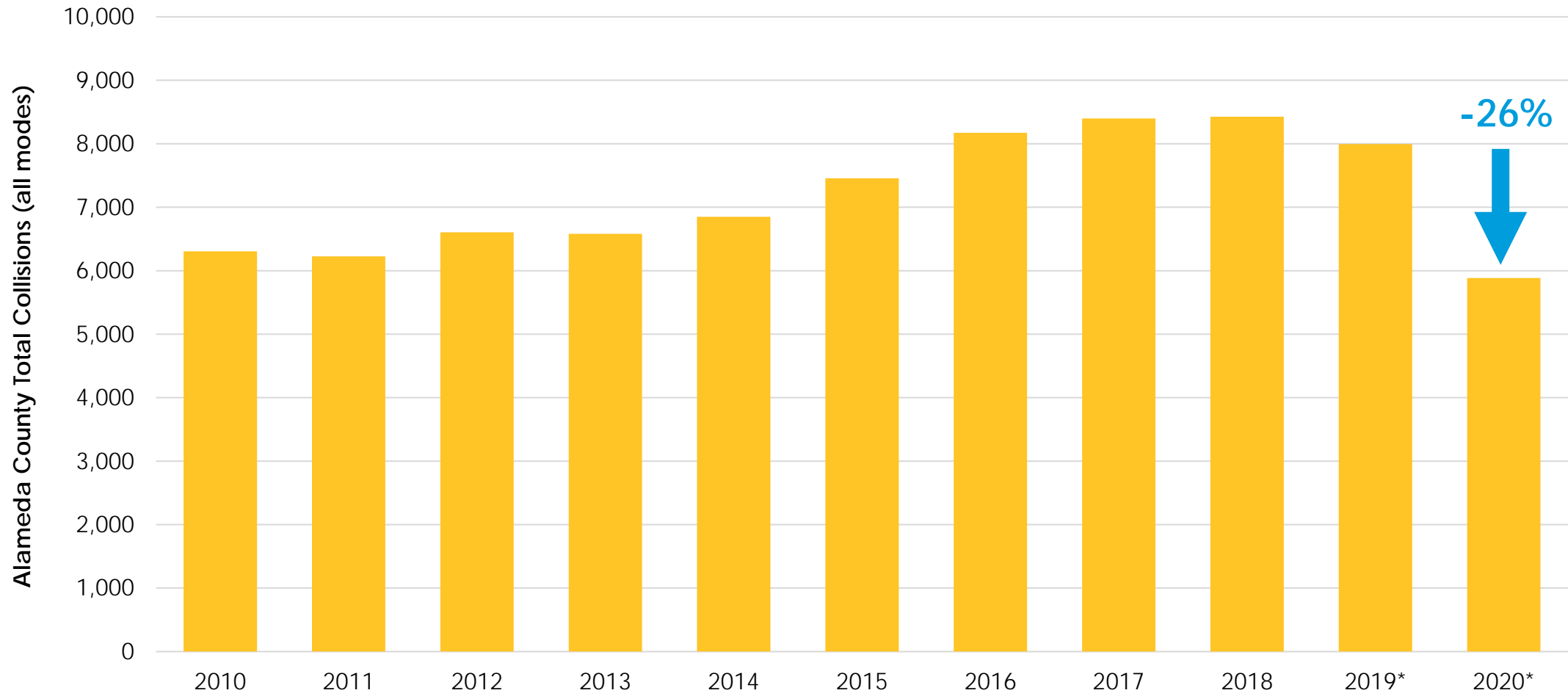
## Safety: Key Findings

- Drop in total collisions
- Rise in pedestrian collisions
- Rise in fatal collisions



# Significant Drop in Total Collisions

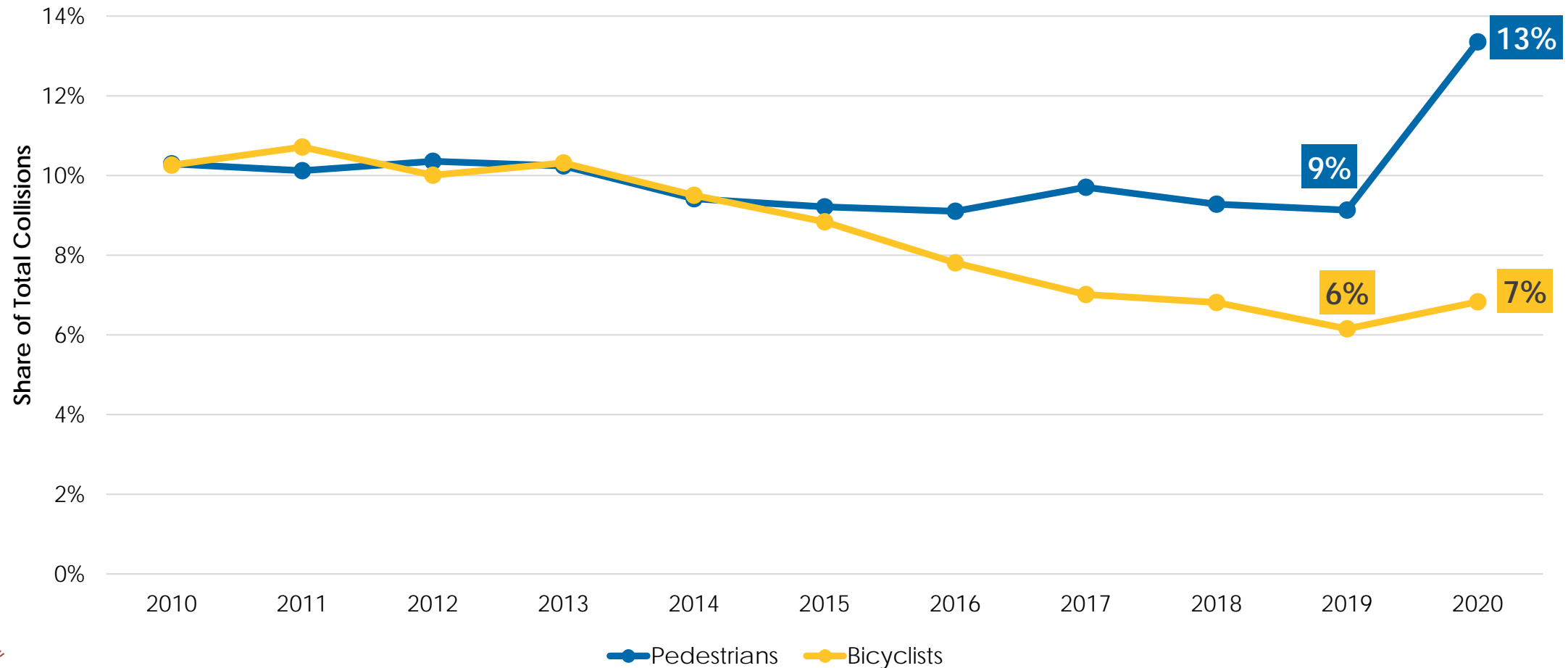
Total Collisions 2010 – 2020 (all modes)



Source: TIMS, Alameda County 2010-2020, \*Provisional Data

# Bike Ped Safety Remains a Concern

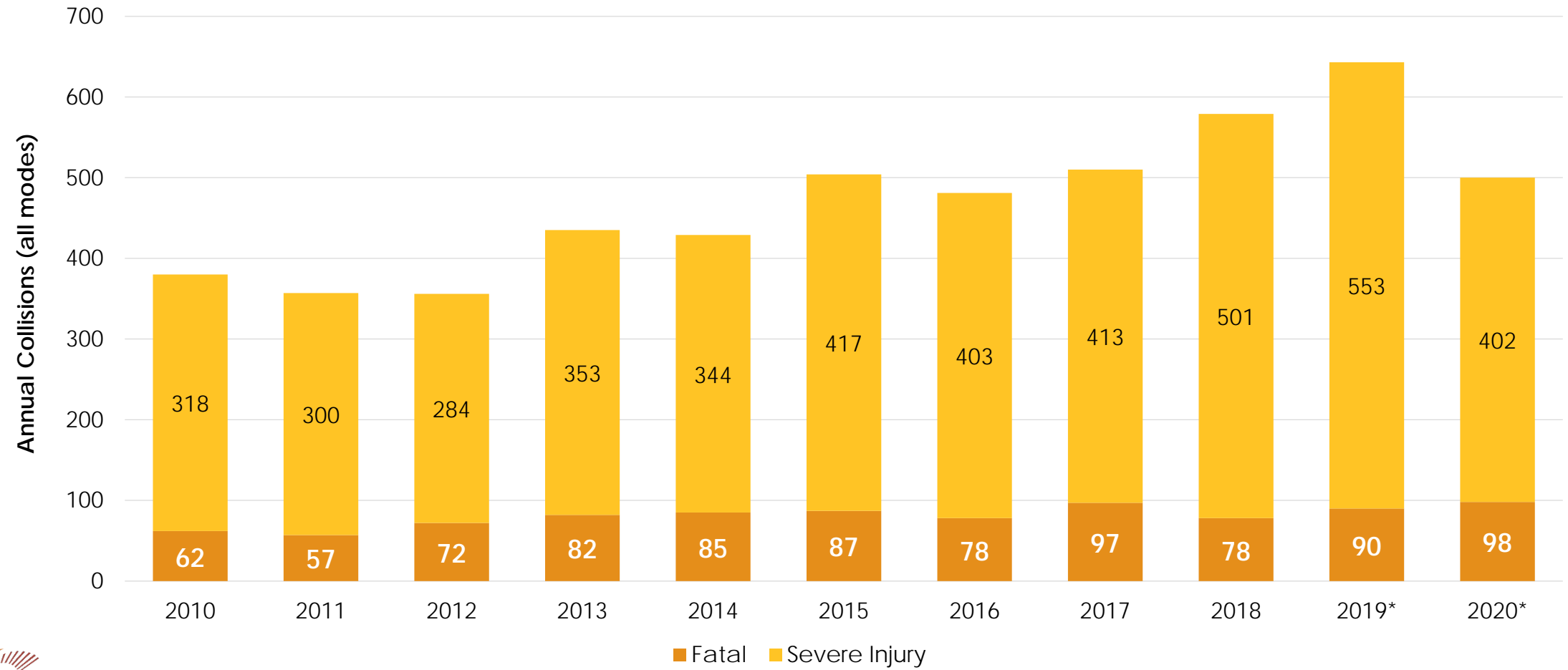
Share of Total Collisions by Mode





# Severe Injuries Down, Fatalities Up

Fatal and Severe Collisions 2010 – 2020 (all modes)



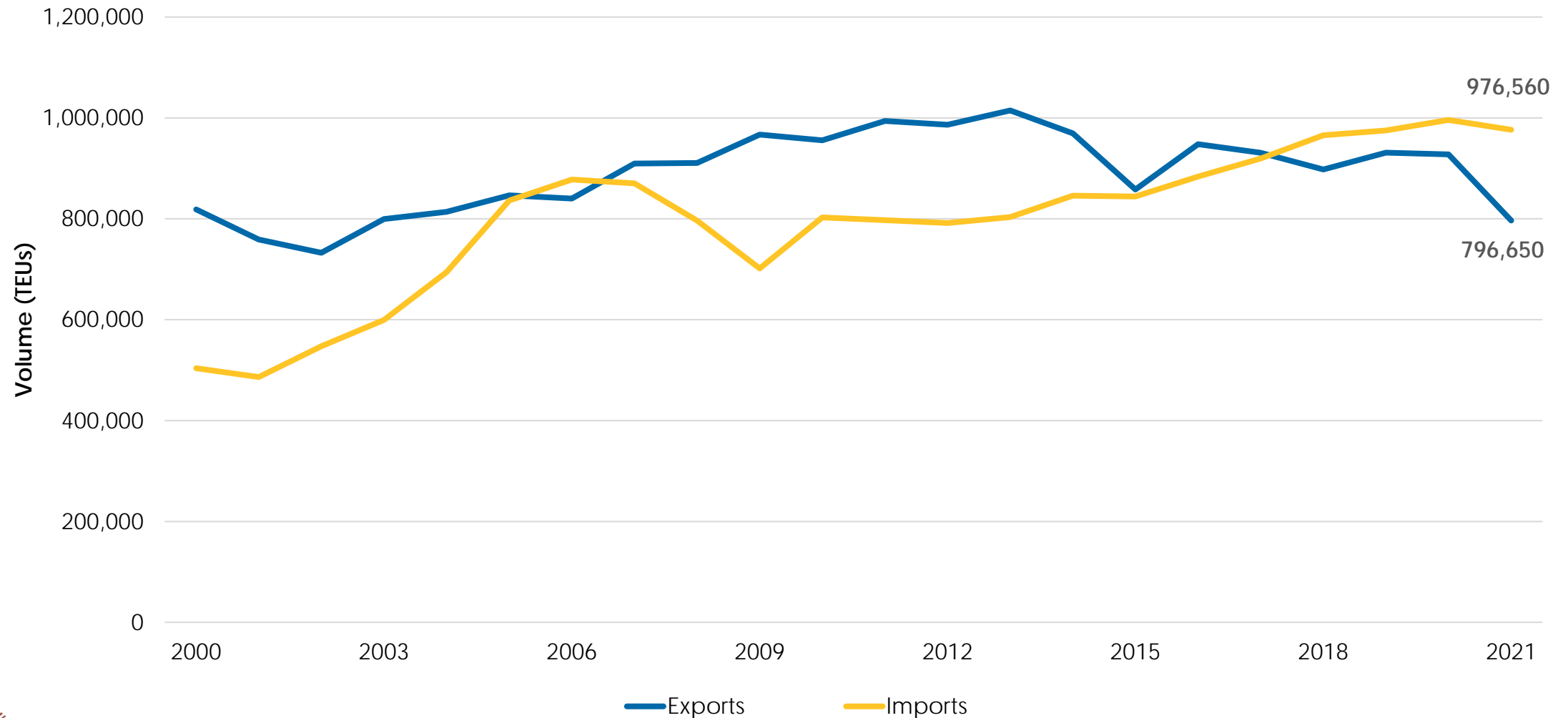
Source: TIMS, Alameda County 2010-2020, \*Provisional Data

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## Goods Movement: Key Findings

- National rank fell from 8 to 10
- Port volume declined, driven by falling exports

# 2021 Drop in Port Volume



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# Conclusions

- Long-term population and economic trends unclear
  - Hybrid schedules expected for many
- Transit ridership remains low; concerning financial outlook
  - Recent recovery rates & targeted investments are encouraging
- Intra-county congestion has largely returned
- Rising fatal collisions a top concern

# Thank You!

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