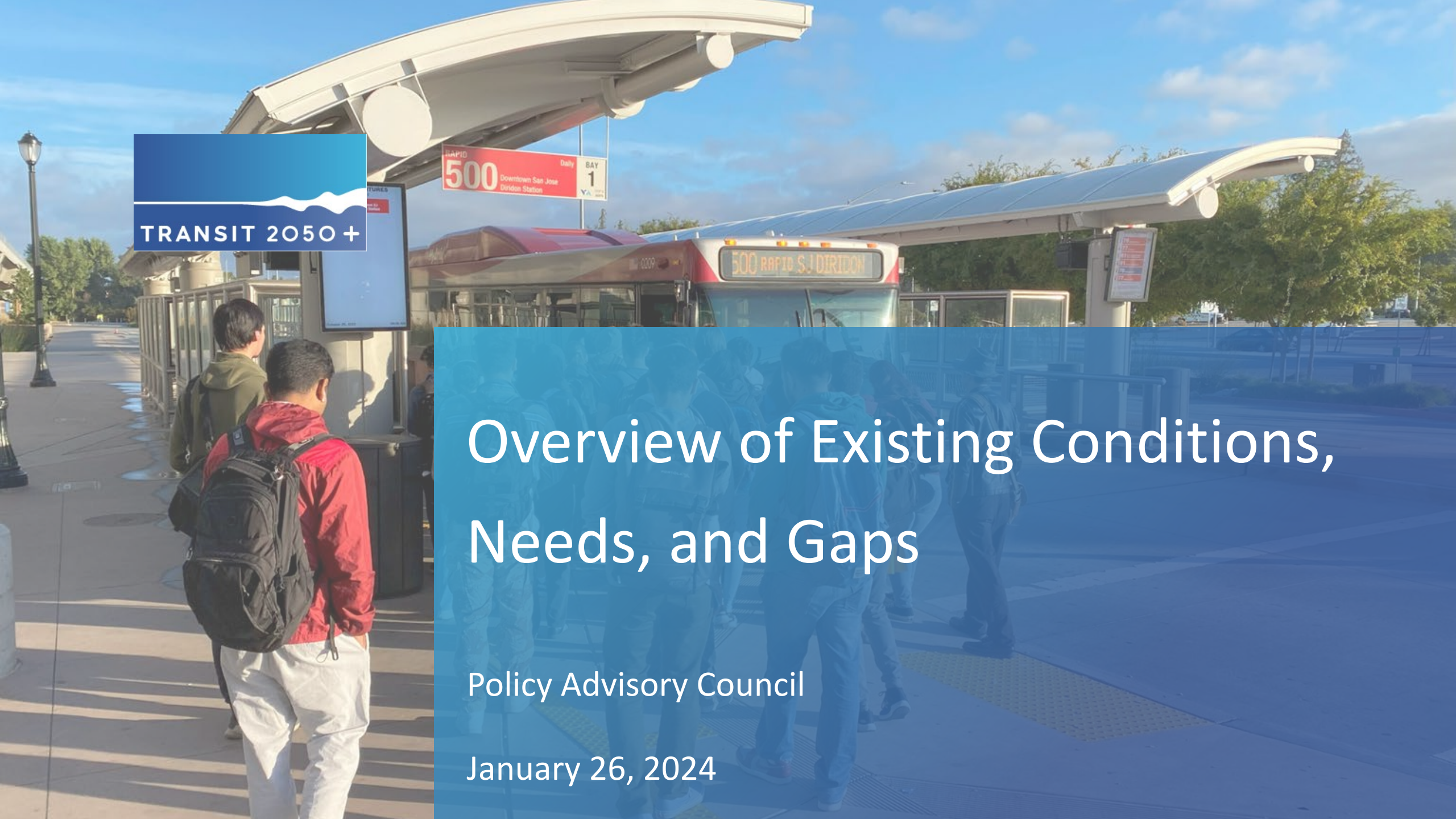

Overview of Existing Conditions, Needs, and Gaps

Policy Advisory Council

January 26, 2024

Transit 2050+ Background and Purpose

Action #18
Fund, develop and adopt a Bay Area Connected Network Plan

Plan Bay Area 2050 establishes a regional **vision, strategies, and investment priorities** for the medium and long term that focus on:

- Significantly **enhancing service** across the region's transit network
- **Improving transit network connectivity** and intermodal connections
- **Reforming regional transit fare policy**

Transit Transformation Action Plan identified 27 strategic actions to **improve transit customers' experience** and respond to the COVID-19 pandemic's effects on transit ridership that address:

- Fare policy
- Mapping and wayfinding
- Service planning and provision
- Funding

Transit 2050+ is a comprehensive update to Plan Bay Area's transit strategies and investments that seeks to:

- Develop an integrated, well-connected transit network
- Recover and grow transit ridership
- Improve transit reliability and speed
- Reduce barriers to using transit

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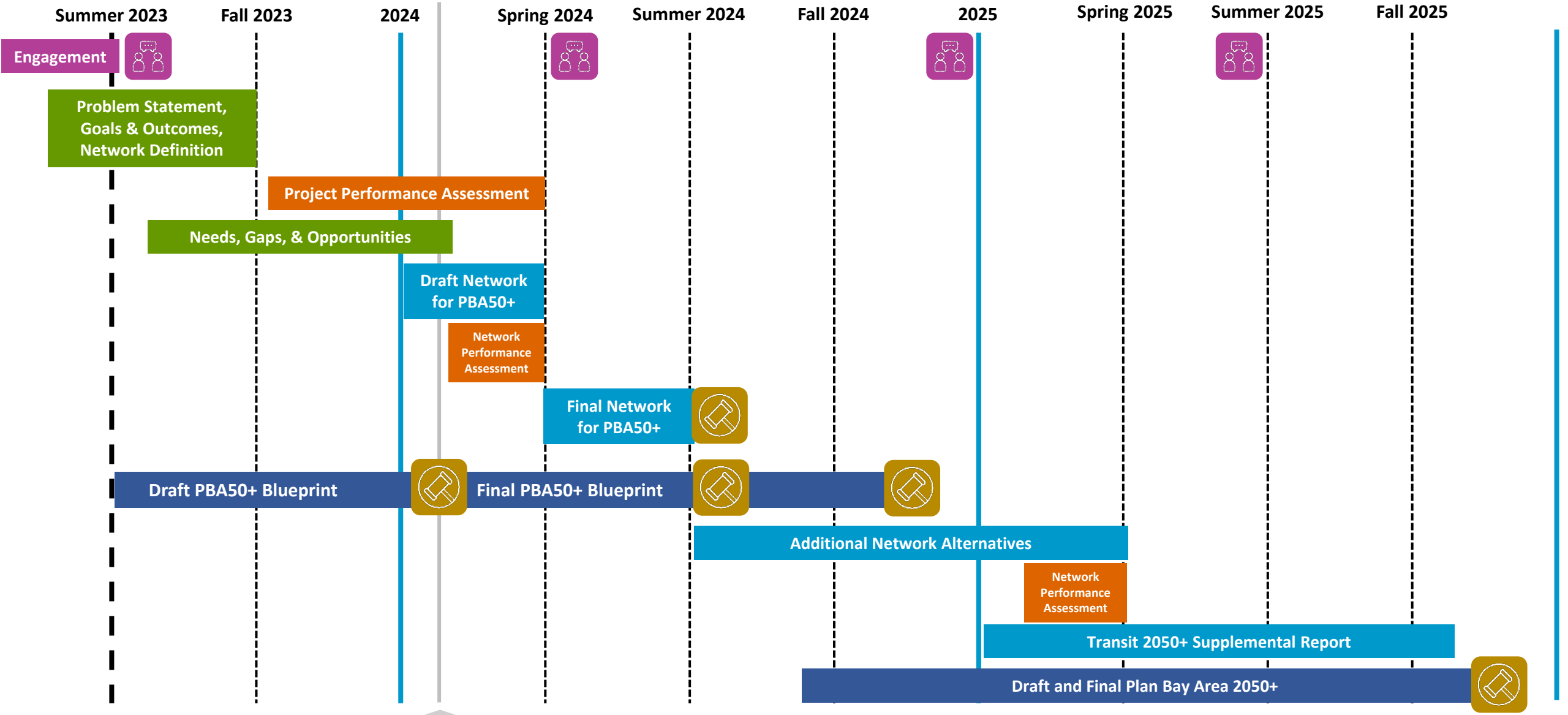
Transit 2050+ Revised Approach and Schedule



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Key Findings from Summer 2023 Public Outreach

Photo credit: Flor Haus

500 pop-up participants, 2,900 survey responses

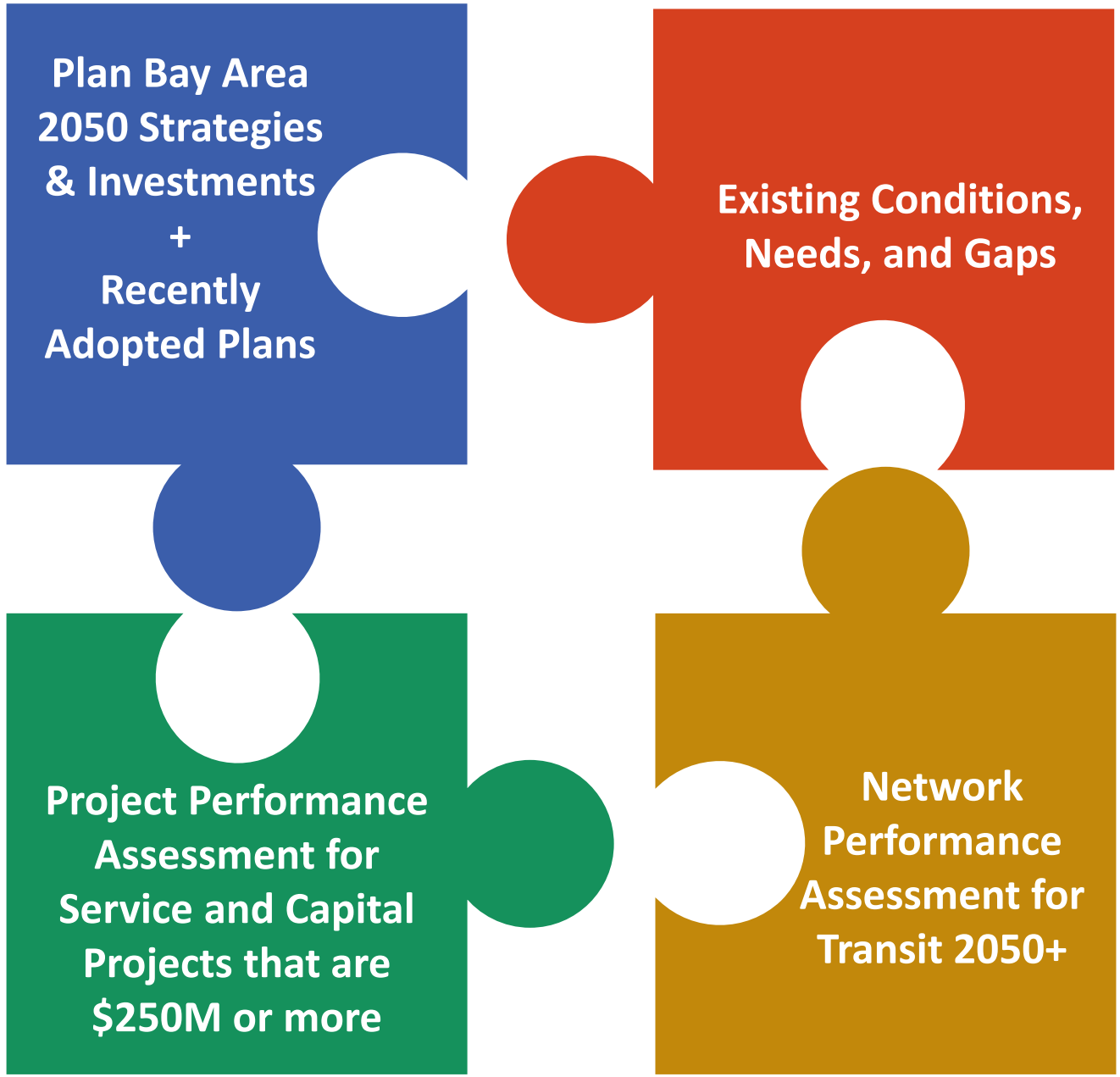
Frequent transit users prioritize transit frequency, convenience, and travel time. Top trip purposes are work, errands or appointments, and leisure or recreation.

Occasional transit users prioritize transit convenience, travel time, and frequency. Top trip purposes are leisure or recreation, events, and travel (e.g., trips to the airport).

People who never use transit prioritize transit convenience, safety, and travel time. Top reasons they would consider using transit are travel, events, and leisure or recreation.

Existing Conditions, Needs, and Gaps: Purpose of Analysis

Plan Bay Area 2050 and recently adopted local plans **establish mid- and long-term vision, strategies, and investment priorities.**



Purpose of existing conditions, needs, and gaps analysis is to **integrate post-COVID data (transit service, land use, and travel patterns) into Transit 2050+ connected network planning.**

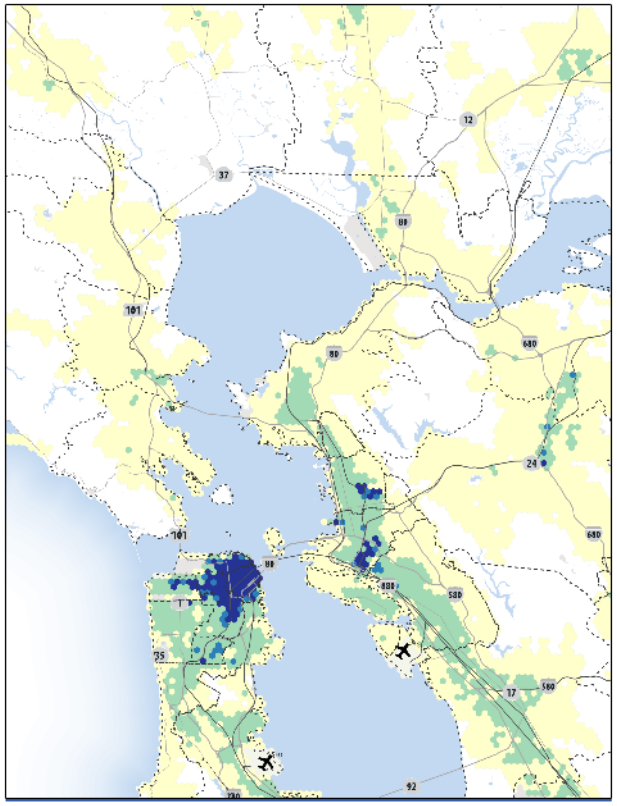
The Project Performance Assessment will **assess the benefits and costs of major transit investments across the different Horizon futures.**

The Network Performance Assessment will **evaluate the draft Transit 2050+ network against desired goals and outcomes.**

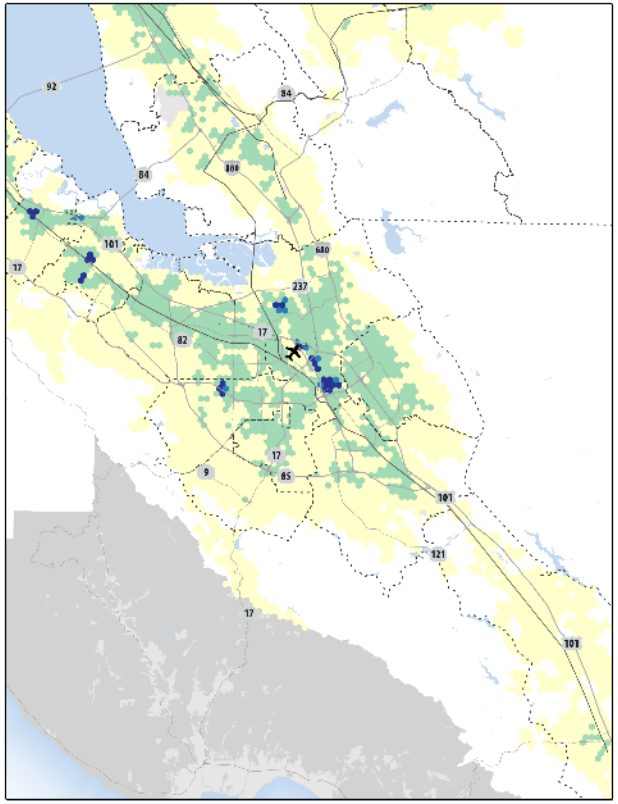
Existing Conditions: Transit Orientation

Key Finding: As of 2023, the most transit-oriented areas are in Downtown San Francisco, Berkeley, and Oakland; however, communities along major corridors that encircle the Bay also show a moderate propensity for higher-capacity transit.

Northern Zone

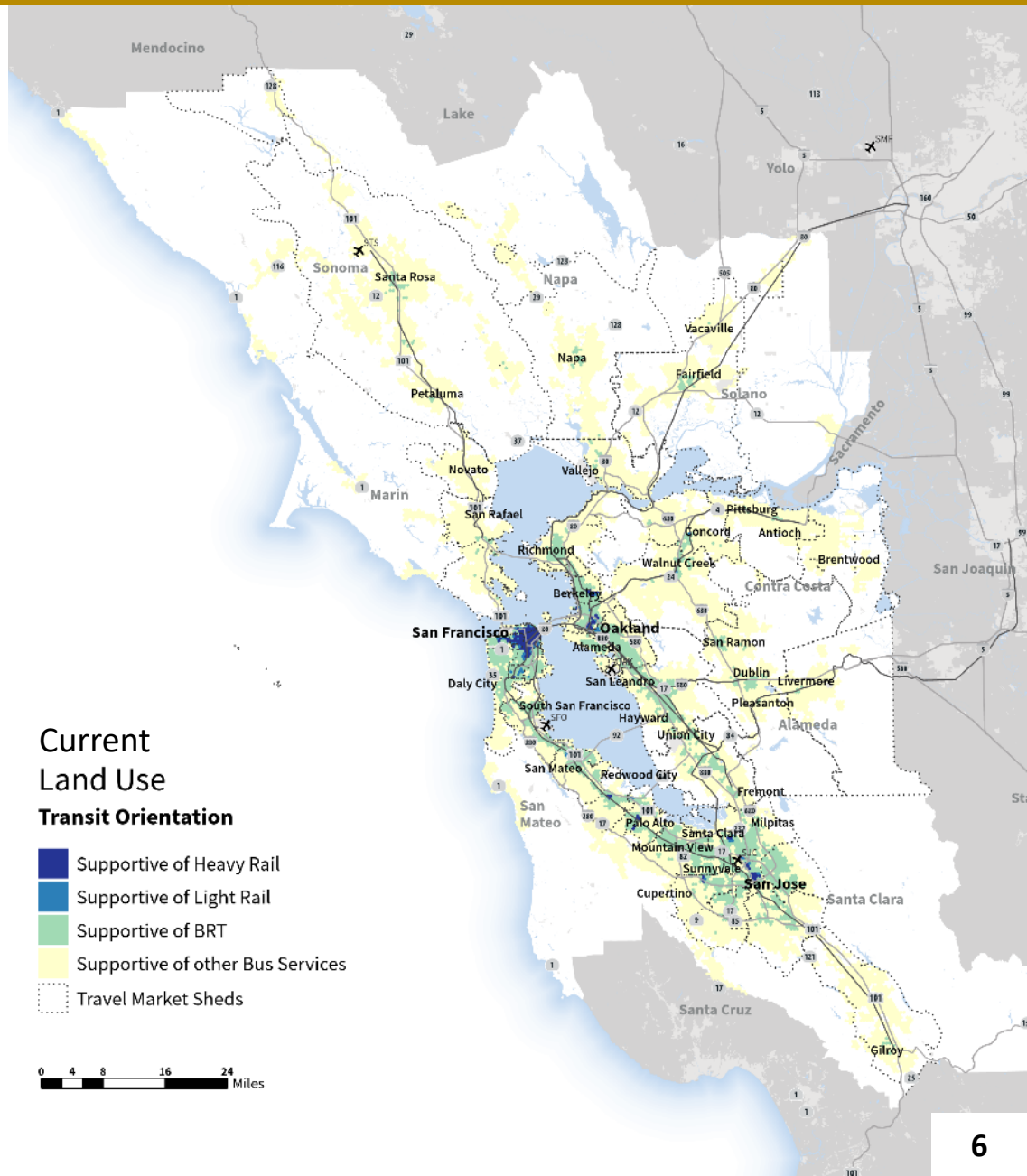


Southern Zone



Sources: 2020 Census, 2020 LEHD, 2020 American Community Survey, 2021 TIGER/Line Shapefiles

Transit supportive density definitions: Supportive of other Bus Services: <1,400 people; Supportive of BRT: 1,400-3,999 people; Supportive of Light Rail: 4,000-4,799 people; Supportive of Heavy Rail: 4,800 or more people



Existing Conditions:

Service Levels

Key Finding: Transit service levels are most robust in San Francisco, western Alameda and Contra Costa counties, northern San Mateo County, and the South Bay, reflecting a combination of BART and frequent bus lines. Outside of San Francisco, many of these corridors have less frequent service in non-peak periods.

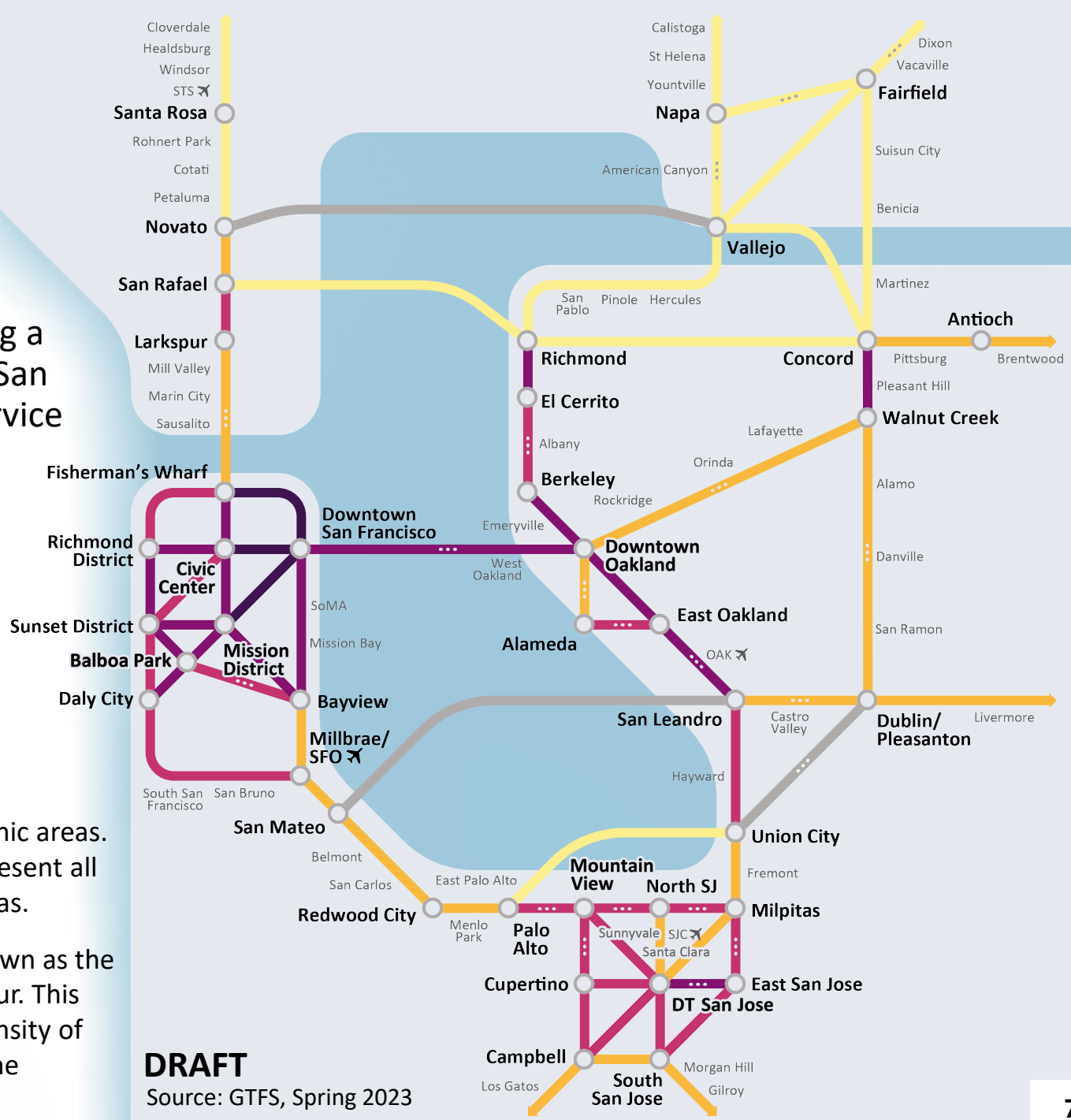
Existing Frequency Index (Average)

- 1 (very high)
- 2 (high)
- 3 (medium)
- 4 (medium-low)
- 5 (low)
- 6 (very low or none)

Index variation across time periods

Nodes represent larger geographic areas. The lines connecting nodes represent all service between geographic areas.

Existing service frequency is shown as the average of one-way trips per hour. This index scales in terms of both density of the network and frequency of the individual routes.



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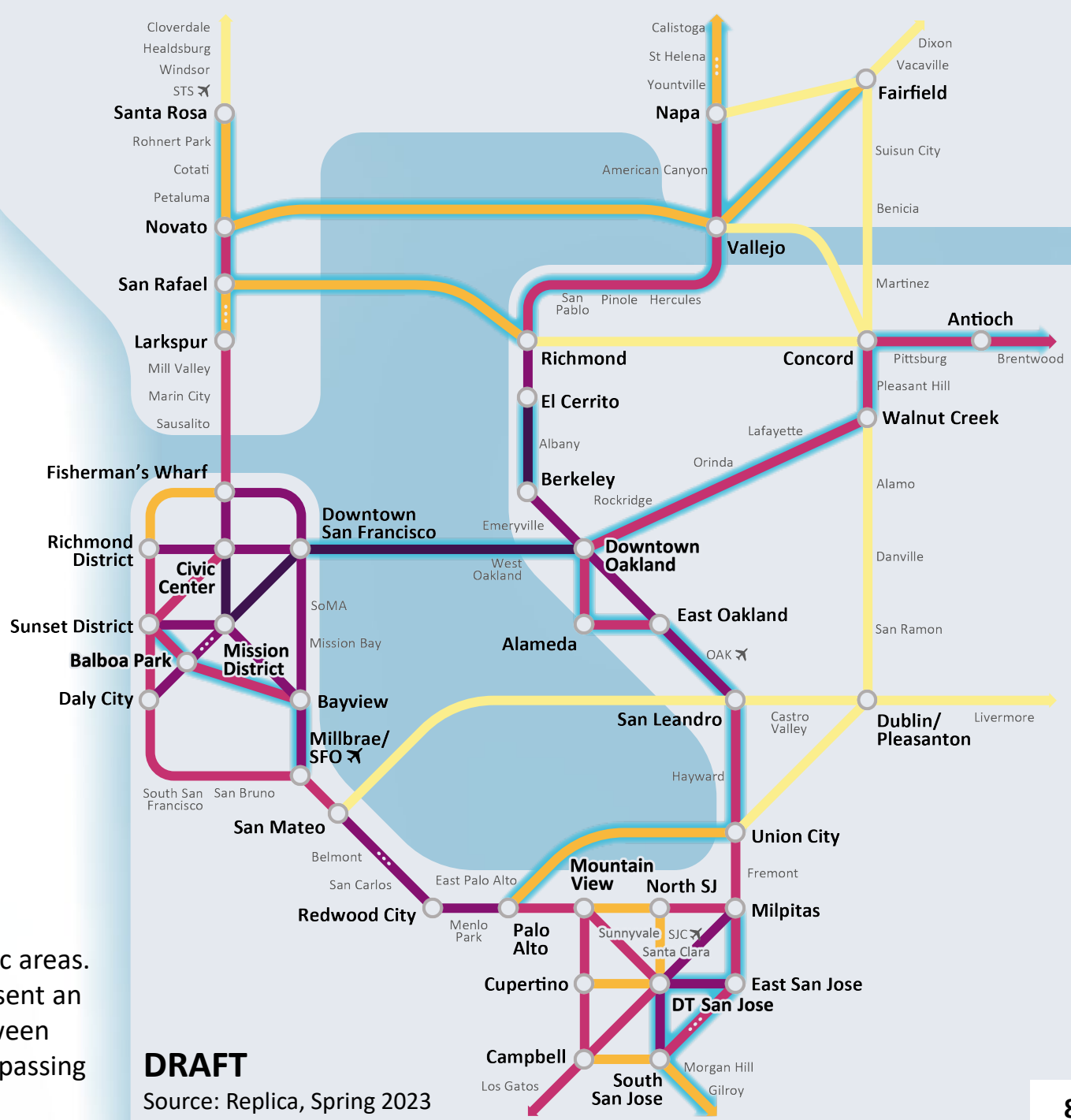
Source: GTFS, Spring 2023

Existing Conditions:

Travel Demand Index with Equity Needs

Key Findings: High demand corridors were identified in San Francisco, the Peninsula, East San Jose, and much of the East Bay. In the North Bay, there are several links where travel demand for Equity Priority Populations was proportionally higher than that for the general population.



Existing Demand Index with Equity Needs (Average)

- 1 (very high)
- 2 (high)
- 3 (medium)
- 4 (low)
- 5 (very low)

Index variation across time periods

Equity Need Identified

Nodes represent larger geographic areas. The lines connecting nodes represent an average of all travel demand between geographic areas, including trips passing through a particular node.

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Source: Replica, Spring 2023

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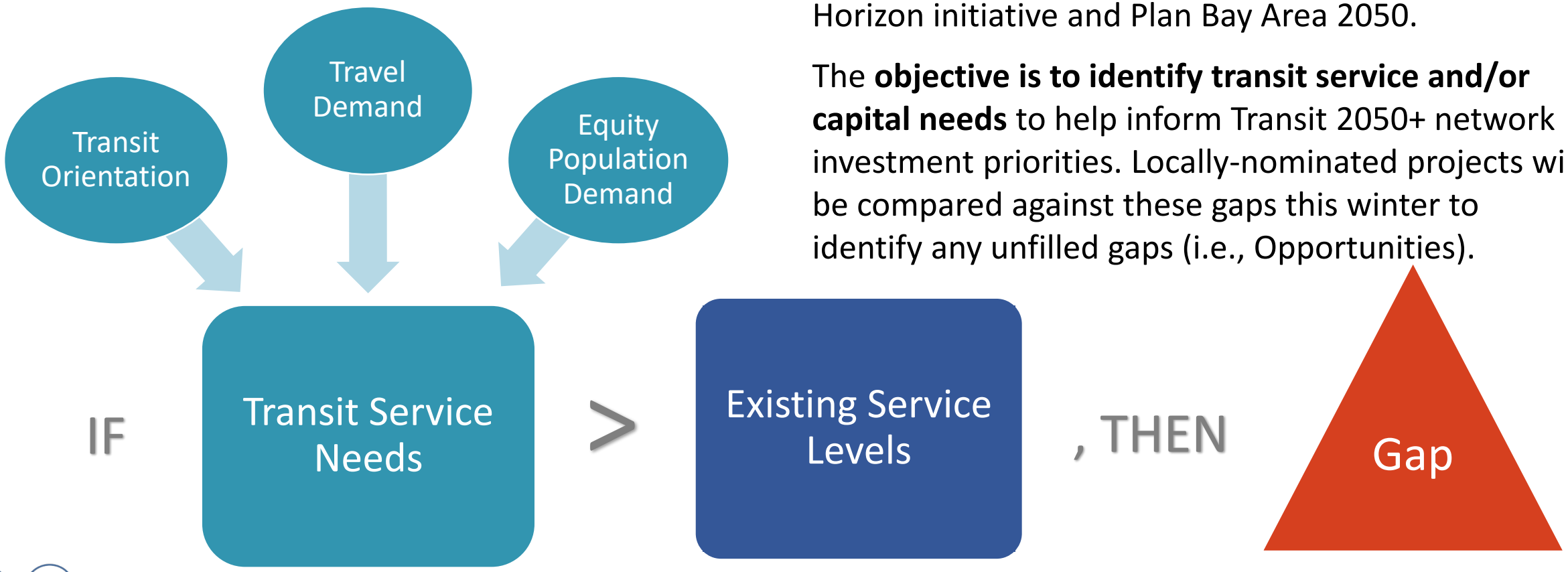
Current Needs and Gaps Assessment

The Needs Assessment focuses on evaluating year 2023 data to **identify potential near-term unmet transit needs that have arisen from changes in travel patterns caused by the COVID-19 pandemic.** Future year 2050 needs were assessed as part of the Horizon initiative and Plan Bay Area 2050.

The **objective is to identify transit service and/or capital needs** to help inform Transit 2050+ network investment priorities. Locally-nominated projects will be compared against these gaps this winter to identify any unfilled gaps (i.e., Opportunities).



Needs and Gaps:

Service Level Needs

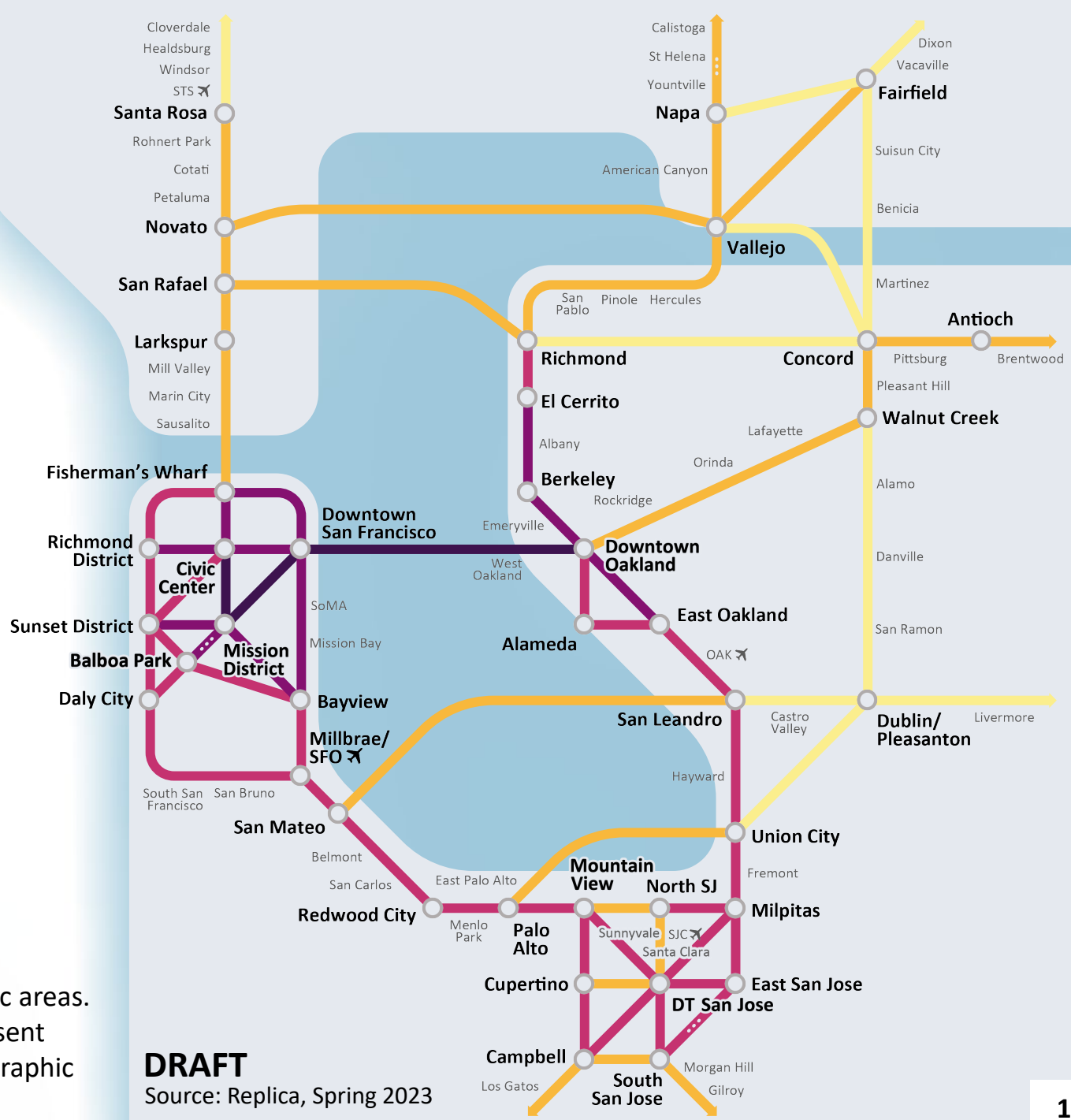
Key Findings: Service level needs are highest across the Bay Bridge and in central San Francisco. Medium to high transit service needs are typically seen on links elsewhere in San Francisco, the Peninsula, and in the East Bay and South Bay. Very low and low service level needs are mostly in the North Bay and on the edges of the Bay Area.

Service Needs Index (Average)

- 1 (very high)
- 2 (high)
- 3 (medium)
- 4 (low)
- 5 (very low)

Index variation across time periods

Nodes represent larger geographic areas. The lines connecting nodes represent service level needs between geographic areas.



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Source: Replica, Spring 2023

Needs and Gaps:

Potential Service Gaps

This diagram shows where current transit service may not meet the potential need or demand based on the combination of transit orientation, travel demand, and equity priority population travel demand for at least one weekday time period. This assessment does not consider needs and gaps related to capacity or crowding.

Key Finding: 30 links in the network have a potential gap identified for at least one time period and are generally dispersed throughout the region.

Potential Gaps Identified:

- Potential Gap Identified for Peak and Non-Peak Periods
- Peak-Period only Potential Gap Identified
- Non-Peak Period only Potential Gap Identified
- No Gap Identified

Nodes represent larger geographic areas. The lines connecting nodes represent service level needs between geographic areas.

Needs and Gaps:

Arterial Transit Speeds

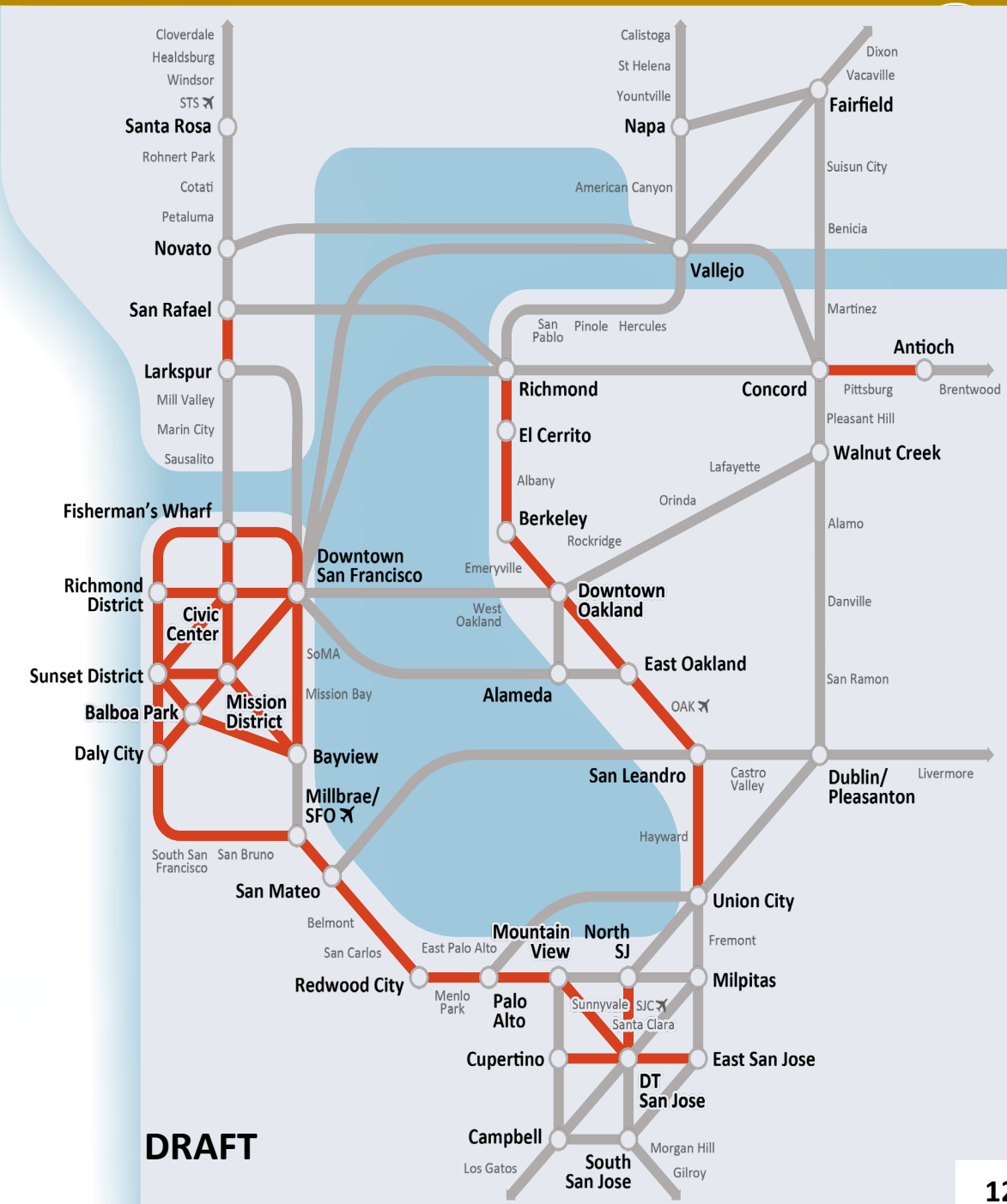
Key Findings (for non-freeway, arterial transit speeds only): On a link level, PM slow speeds are generally concentrated in San Francisco. Slow speeds are also common along the Peninsula all the way to San Jose, as well as throughout bayside East Bay communities. Some shorter segments are seen between San Rafael & Larkspur and Concord & Antioch.

Transit Vehicle Speed

— Link contains at least one route segment with average PM speed <12 mph and which meets load thresholds

Nodes represent larger geographic areas. The lines connecting nodes represent all slow transit speed arterials between geographic areas.

Source: Cal-ITP, California Transit Speed Maps Project, April 2023



Next Steps

Winter 2024:

- Finalize Needs/Gaps/Opportunities analysis, including identification of new regionally-identified projects that address service and speed gaps identified

Spring 2024:

- Share initial Project Performance results for locally-nominated and regionally-identified projects
- Seek input on draft recommended Transit 2050+ network (including strategies and capital and service investments)

Questions and Discussion

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Photo credit: Anthony Lindsey