
Authority Board **STAFF REPORT**

Meeting Date: October 20, 2023

Subject	Contra Costa County Transit Market Assessment and Future of Transit Discussion
Summary of Issues	<p>Staff will provide an update on the Integrated Transit Plan (ITP) Market Assessment and facilitate a discussion on the future of transit. The Authority's transit-first vision includes the prioritization of integrated transit while maintaining community-specific services. The ITP will provide technical and planning guidance with a clear vision for delivering a robust and cohesive transit network that connects all major activity centers and regional hubs in Contra Costa County.</p> <p>Staff will share the Market Assessment and key takeaways from the ITP Framing Workshop as a foundation for discussion on the future of transit in Contra Costa County. Staff will seek input on ITP priorities, the role of the Authority in transit, policy, and infrastructure, and funding for transit in the near- and long-term.</p>
Recommendations	<p>Staff will seek input on the Integrated Transit Plan priorities, the role of the Authority in transit, policy, and infrastructure, and funding for transit in the near- and long-term. In addition, the Contra Costa County transit operators will provide presentations on the current state of their services, key projects, and plans for the future. This is an informational item only; no staff recommendation at this time.</p>
Staff Contact	Ying Smith
Financial Implications	None

Options	N/A
Attachments	None
Changes from Committee	N/A

Background

The ITP will serve as a countywide blueprint for a customer-centered approach to transit delivery in Contra Costa County in a post-pandemic environment. With multiple Bay Area Rapid Transit (BART) stations, as well as Amtrak stations and a Water Emergency Transportation Authority ferry terminal in Contra Costa County, there are significant opportunities for bus and other mobility transfers and connections. The intent of the ITP is to identify opportunities for making public transit more attractive to the customer. In addition, the Bay Area region is looking at similar opportunities region-wide.

The Authority's ITP will develop an approach to investments that:

- **Creates Connections** between the existing transit networks and establishes new cross-boundary networks.
- **Supports Coordination** among the bus transit operators, regional operators, and other mobility providers.
- **Reflects Community** needs and desires while using an equity lens to ensure that all communities benefit from the investments.
- **Identifies Capital Programs** that support higher levels of service level and improved service quality.

The project kicked-off in April 2023 following award of Agreement No. 630 to Sam Schwartz Engineering, DPC. The 18-month project is scheduled to be completed in late 2024. It includes the following five tasks:

- **Task 1: Existing Service Assessment & Market Analysis.** A data-driven approach to identifying where transit is currently successful, where gaps exist and where there

are untapped markets that can be better served.

- **Task 2:** Action Plans to Improve Existing Service and Expand Travel Choices. Analysis and recommendations for action plans that can grow transit mode share over time.
- **Task 3:** Institutional and Policy Changes. Explore potential policy and institutional changes that support relevant actions from Task 2.
- **Task 4:** Capital Improvements to Support Service. Applying work from Tasks 1-3, conduct a cost-benefit analysis to prioritize potential projects and initiatives.
- **Task 5:** Public & Stakeholder Engagement. Engagement with key stakeholders, including transit operators, community-based organizations, municipalities, and the Authority Board.

Task 1, the Market Assessment includes three major components:

1. **Transit Travel Trends Pre/Post-Pandemic.** The Transit Market Assessment looked at how travel patterns have changed from 2019 to 2023 with the effects of COVID-19 on work-from-home rates, as well as changes in projected employment and population in Contra Costa County. Ridership is still significantly lower than the pre-pandemic level, but the recovery is uneven. Transbay and express bus trips have declined significantly and remain low while local transit trips have rebounded. The assessment also identified the top origin and destination pairs to, from, and within Contra Costa County for all trips. Comparing this travel demand to transit supply, opportunities for where additional transit service might serve unmet needs were identified.
2. **Transit Service Level and Coverage.** The assessment also looked at current transit service levels and coverage. A Gaps Analysis was completed and identified that a significant portion of Contra Costa County's population is currently served by transit, while a majority of the jobs and activity centers are served by transit during the day and peak commuting hours. The proportion of the population, jobs and activity centers that are served declines notably in the evenings and on the weekends. In addition, a small percentage of Contra Costa County is served by frequent transit service, defined as four transit trips or more per hour, and these areas are mostly

clustered around BART stations.

3. **Summary of Traveler Research from Previous Authority Studies.** Traveler Research showed that close to half of Contra Costa County's population (48%) are somewhat or very willing to take transit. Survey respondents who cited that they were 'frequent' transit riders tended to be West County residents (58%), younger (49% between 18-39), women (61%), people of color (82%), in households earning < \$100k (68%), and renters (66%). Additionally, the study showed that the factors that would encourage more people to take transit include greater frequency, better transit coverage, faster, and more reliable.

As of October 2023, Task 1 is near completion and work on Task 2 is well underway. As part of Task 2, a Framing Workshop was conducted on September 20, 2023, with a goal of incorporating the thoughts and ideas of transportation leaders to shape the ITP and ensure it seizes opportunities to improve the current transit network while aligning with the future plans of transit agencies within Contra Costa County. During the workshop, more than 30 local and regional transit, city/town, and county leaders reviewed the Market Assessment and Gaps Analysis and weighed in on the guiding principles and goals for the ITP. Attendees divided into breakout groups and collaborated on both near-term and visionary ideas for transit service opportunities, infrastructure needs, policy considerations, and emerging technologies to improve the transit network and mobility in Contra Costa County.

Next steps for the project include incorporating stakeholder feedback to develop recommendations for improving the existing transit network and assessing potential institutional and policy changes.

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In addition, the Contra Costa County transit operators will provide presentations on the current state of their services, key projects, and plans for the future.