MARKET ANALYSIS

A Closer Look at Travel in the Megaregion

LINK21
CONNECT NORTHERN CALIFORNIA

A Market Analysis was completed in 2021 to provide insight into existing travel patterns and future travel demand within the 21-county Northern California Megaregion. It is a powerful analytical framework that along with ongoing public input, will guide sound decision making for a better-connected passenger rail system in the Northern California Megaregion. The Market Analysis is the most comprehensive travel analysis ever performed for the Megaregion.

What We've Learned

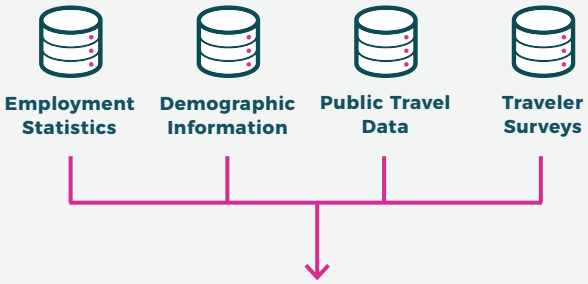
1. A lot more people would take passenger rail if it were convenient.
2. A new underground train crossing of the Bay would be needed to serve projected demand.
3. A new train crossing would have widespread and cascading benefits.

An integrated passenger rail network with a new underground train crossing between Oakland and San Francisco would help accommodate travel demands and address transportation inequities as our population and economy continue to grow. Northern California is the fifth largest megaregional economy in the country, and of that, the San Francisco Bay Area is responsible for over 70 percent of the Megaregion's economic activity and employment growth. Therefore, providing reliable connectivity and access between jobs and affordable housing is crucial to maintaining our quality of life and vitality.

Building the Market Analysis

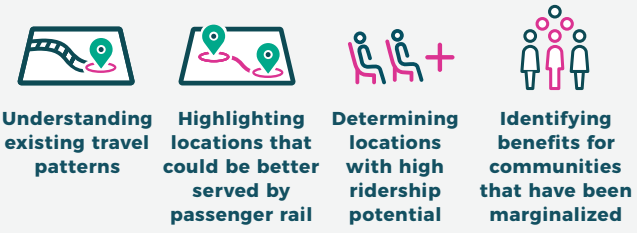
DATA SETS

Data sets are analyzed to determine relationships between supply and demand for transit service within the Megaregion.



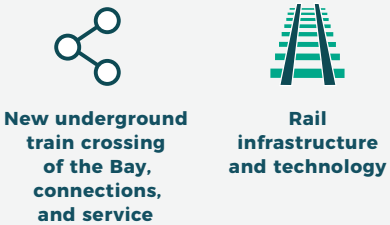
INSIGHTS + GUIDANCE

Analyzed data provide insight and guidance for the discovery of relevant, actionable, and previously unrealized transit service opportunities within the Megaregion.



PROGRAM CONCEPTS

Insights and guidance are used to create concepts that benefit all stakeholders while serving the needs of Megaregion transit users.



PROJECTED GROWTH

20%
In Population

12.7 million
2019

15.3 million
2040

26%
In daily trips **within** San Francisco Bay Area (estimated 28 million)*

64%
In daily trips **between** Bay Area and other counties (estimated 800,000)*

*Projected increase from 2015 to 2040

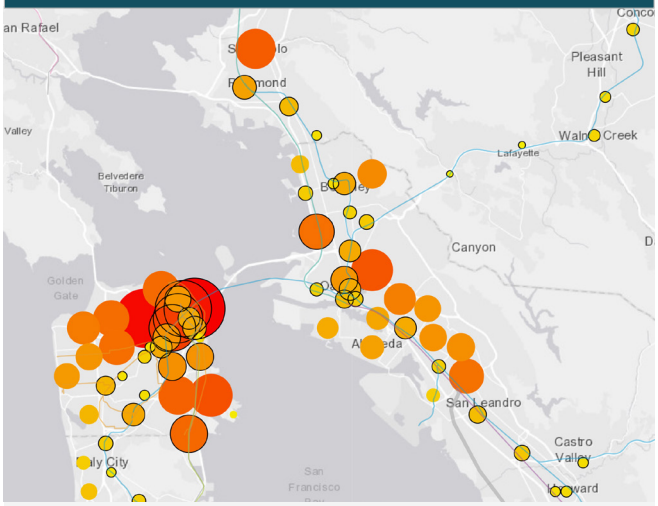
Ridership Potential

The Market Analysis identified markets where people are traveling today with extra emphasis on considering communities that have been underserved. It went beyond typical analysis to understand the overall travel demand and study areas with the greatest potential to support new, improved, or more accessible passenger rail service.

The map on the right uses large red and orange circles to demonstrate the markets with the greatest opportunity for improved transbay train service – San Francisco and Oakland. Other key destinations included Alameda, Emeryville, Berkeley, San Pablo, Hercules, Martinez, Vallejo, San Ramon, and parts of San Mateo County. Smaller, light yellow circles represent lower levels of unmet demand. The black outlined circles represent places with train service today or planned for future service. The larger circles, with or without service today, have the greatest opportunity to grow transbay ridership if good service and connection were provided. This opportunity to either enhance existing service or create new connections for those who don't ride today is referred to as "unmet rail potential."

Transbay Unmet Rail Potential

Unmet rail potential means all the people who do not use passenger rail now, but would if the service were better.



= Markets with the greatest opportunity for improved transbay rail service

= Lower levels of unmet demand

= Destinations currently served or planned to be served by rail

45% of unmet rail potential (for trips over three miles) in the 21-county Megaregion are transbay trips

Learn more at Link21Program.org

Visit the Link21 website to read the Market Analysis summary and full report.

Link21 is sponsored by the San Francisco Bay Area Rapid Transit District (BART) and the Capitol Corridor Joint Powers Authority (Capitol Corridor). The Link21 Team is also working closely with our Northern California rail partners and the State of California to ensure an integrated rail program.