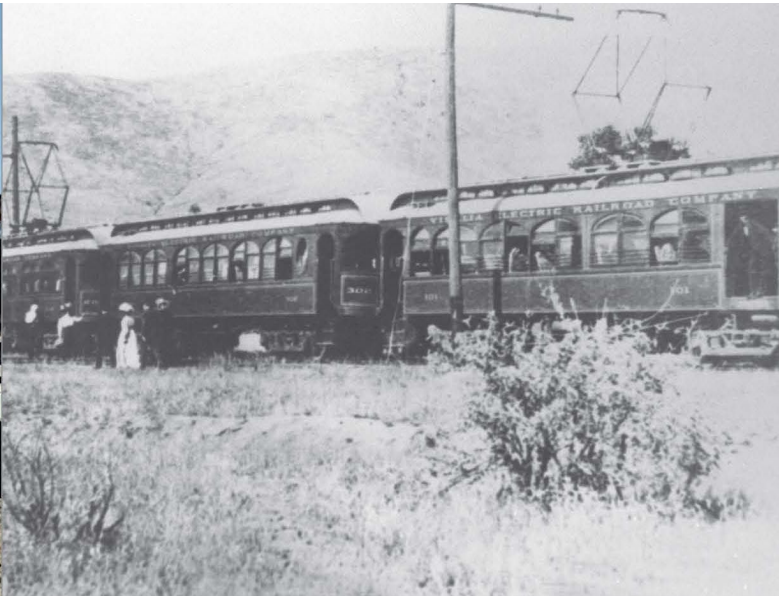# Task 2 Existing Conditions and Market Assessment Progress

Updated August 3rd, 2023

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CA Department of Finance

Population Forecasts

- The California Department of Finance (DOF) Demographic Research Unit develops postcensal population projections which are calculated based on the following formula:

$$Current\ Population = Previous\ Population + (Births\ - Deaths) + Net\ Migration$$

- Population forecasts were updated in July 2023, representing a statewide decline in expected population by 2046 of -8%

- Kings and Tulare County projects were adjusted as well, representing a -13% and -19% reduction respectively

- County transportation demand models similarly make population forecasts for population, households, and employment as part of their SCS/RTP process.

CA Department of Finance

Population Forecasts
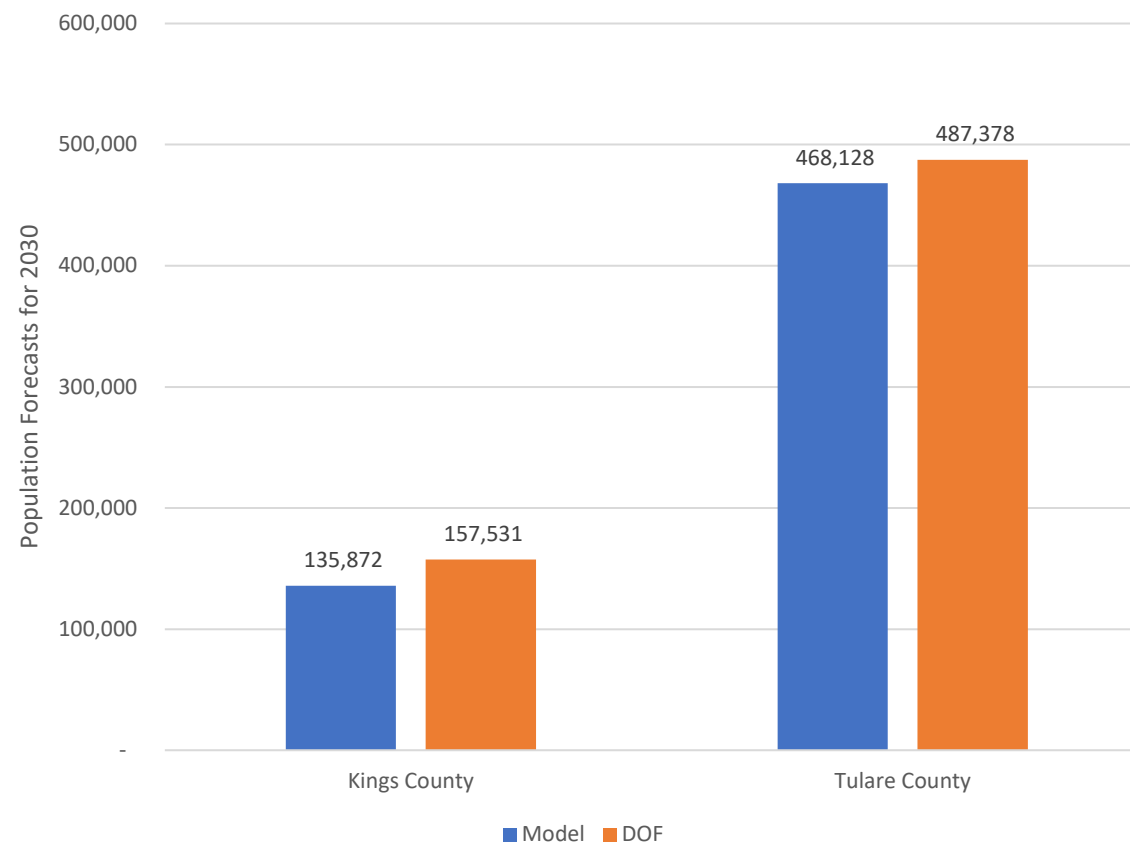
TCAG Base and Horizon Years: 2022/2046
KCAG Base and Horizon Years: 2015/2035/2046

A 2030 condition (Horizon Year for CVC Phase 1) was interpolated based on a linear growth rate between base and horizon years

DOF forecasts are about 16% more population growth and 4% more for Kings and Tulare counties, respectively.

Given the history of higher DOF forecasts than realized, the CVC Phase 1 will defer to demand model forecasts from TCAG and KCAG for population

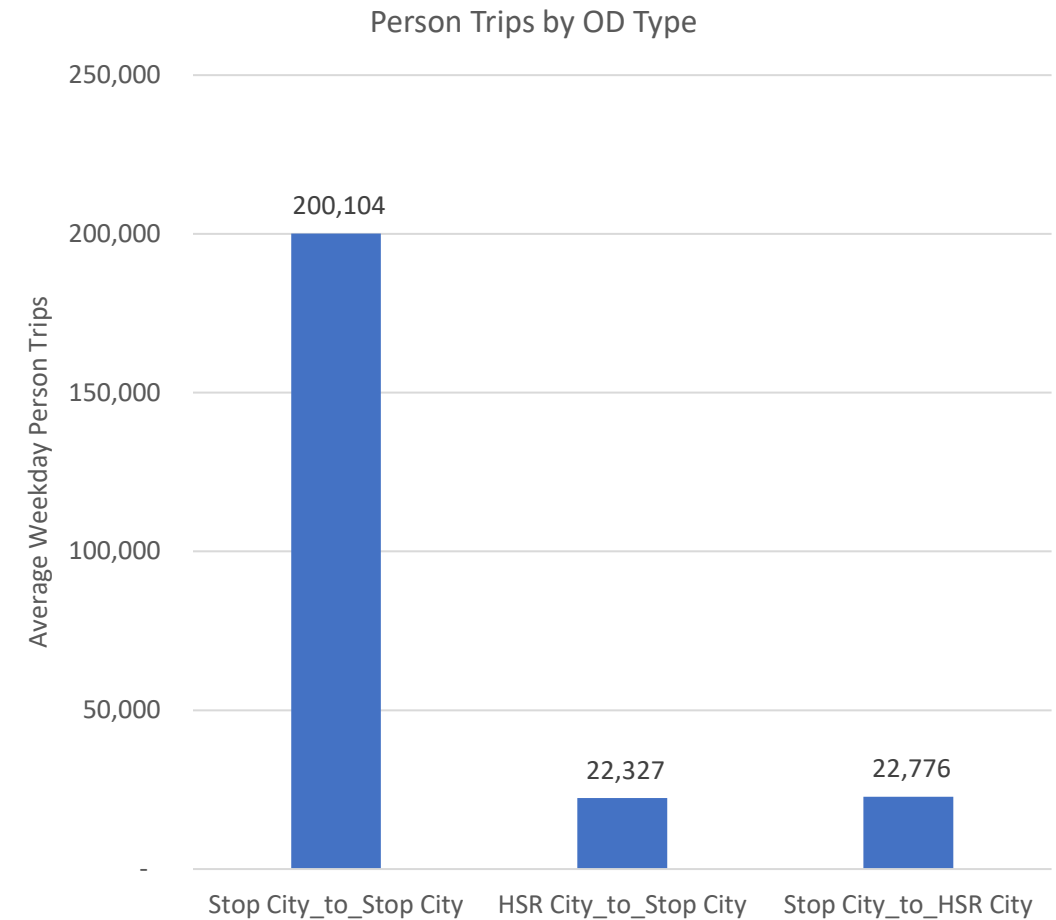### Model and DOF Forecast Comparison (2030 Horizon)

Kings County — Model: 135,872; DOF: 157,531
Tulare County — Model: 468,128; DOF: 487,378

Legend: Model, DOF

(Y-axis: Population Forecasts for 2030 — 600,000; 500,000; 400,000; 300,000; 200,000; 100,000; -)

Baseline Market

Person Trips by City OD Pairs

Origin	Destination	Person Trips (Average Weekday)
Tulare	Visalia	24,517
Visalia	Tulare	23,675
Lemoore	Hanford	12,900
Hanford	Lemoore	12,724
Visalia	Hanford	6,361
Visalia	Fresno	6,338
Fresno	Visalia	6,310
Hanford	Visalia	6,283
Visalia	Farmersville	6,157
Farmersville	Visalia	6,099
Goshen	Visalia	6,052
Exeter	Visalia	6,025
Visalia	Exeter	6,004
Visalia	Goshen	5,850
Porterville	Lindsay	5,445
Lindsay	Porterville	5,182

Person Trips by OD Type

OD Type	Average Weekday Person Trips
Stop City_to_Stop City	200,104
HSR City_to_Stop City	22,327
Stop City_to_HSR City	22,776

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Baseline Market

Person Trips by City OD Pairs

City OD Pairs		Bakersfield	Exeter	Farmersville	Fresno	Goshen	Hanford	Huron	Kings_Tulare_HSR	Lemoore	Lemoore Station	Lindsay	Madera	Merced	Porterville	Strathmore	Tulare	Visalia
												Destination City						
Origin City	Bakersfield		49	16	1,077	62	221	40	1	56	3	130	85	38	732	54	670	697
	Exeter	63		1,665	267	170	135	1	6	21	8	1,001	5	4	1,077	68	818	6,025
	Farmersville	14	1,630		155	44	99	6	2	9	2	300	2	2	301	83	557	6,099
	Fresno	1,100	249	144		426	4,136	419	133	1,804	358	247	18,724	2,125	863	37	2,030	6,310
	Goshen	64	127	51	465		285	15	35	58	3	32	25	8	142	5	963	6,052
	Hanford	188	138	85	4,294	298		859	1,376	12,724	2,309	81	88	34	258	10	1,447	6,283
	Huron	41	3	6	420	9	931		4	445	24	3	27	8	6	1	29	165
	Kings_Tulare_HSR	3	6		109	19	1,464	5		124	12		1	1	8	1	34	189
	Lemoore	60	26	9	1,721	59	12,900	449	129		1,727	20	38	14	41	1	312	1,203
	Lemoore Station	4	1		320	1	2,082	25	11	1,867		240			1		13	214
	Lindsay	166	1,060	328	275	45	79	2		10	233		12	3	5,182	998	1,536	2,905
	Madera	61	7	2	19,216	19	99	36	2	23	2	5		1,012	23		106	245
	Merced	40	3	2	2,313	1	31	2		7		3	1,164		5		31	60
	Porterville	794	1,135	291	899	134	265	3	6	40	10	5,445	19	6		2,876	2,908	4,784
	Strathmore	43	71	79	45	3	16			2	6	1,014	2		2,737		113	271
	Tulare	685	796	639	2,160	971	1,477	32	44	307	21	1,346	104	36	2,990	114		24,517
	Visalia	708	6,004	6,157	6,338	5,850	6,361	148	226	1,168	181	2,766	252	59	4,616	230	23,675	

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Baseline Market

Person Trips by City OD Pairs

Trip Distribution by Mode
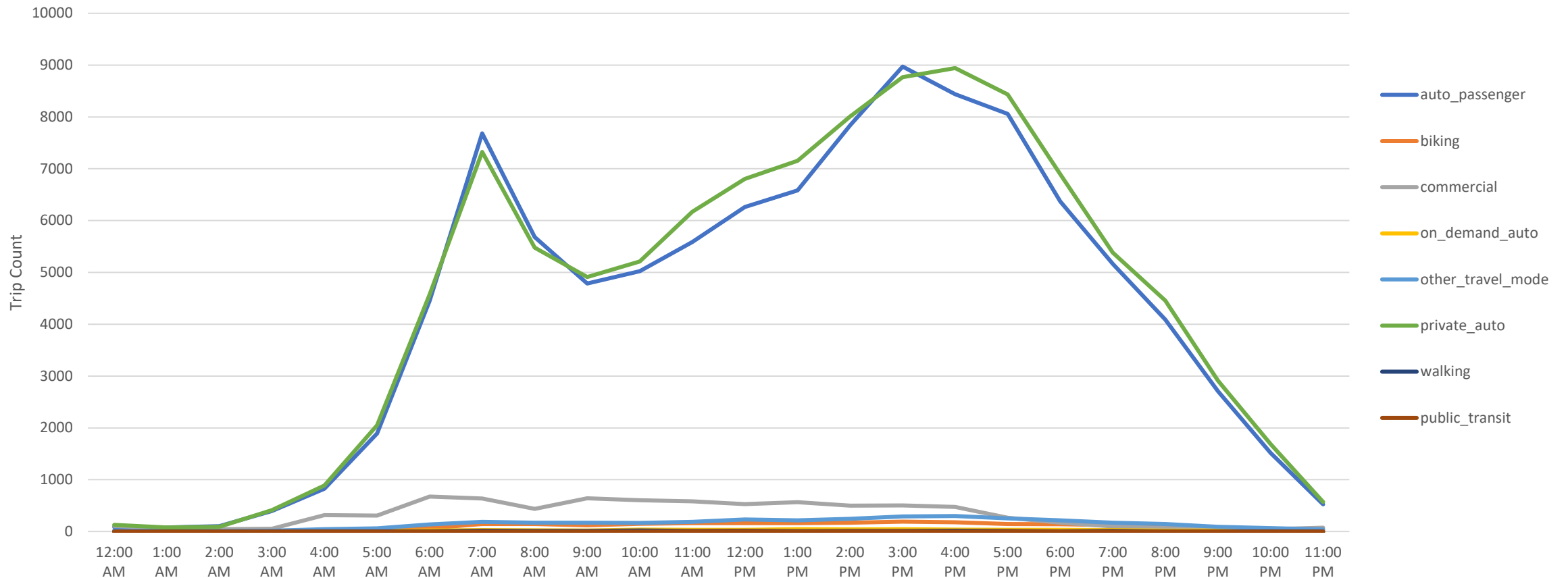
Baseline Market

Person Trips by City OD Pairs

Trip Distribution by Trip Purpose

Legend:
- commercial
- eat
- home
- lodging
- maintenance
- other_activity_type
- recreation
- school
- shop
- social
- work
- region_departure

Y-axis: Trip Count
X-axis: Axis Title
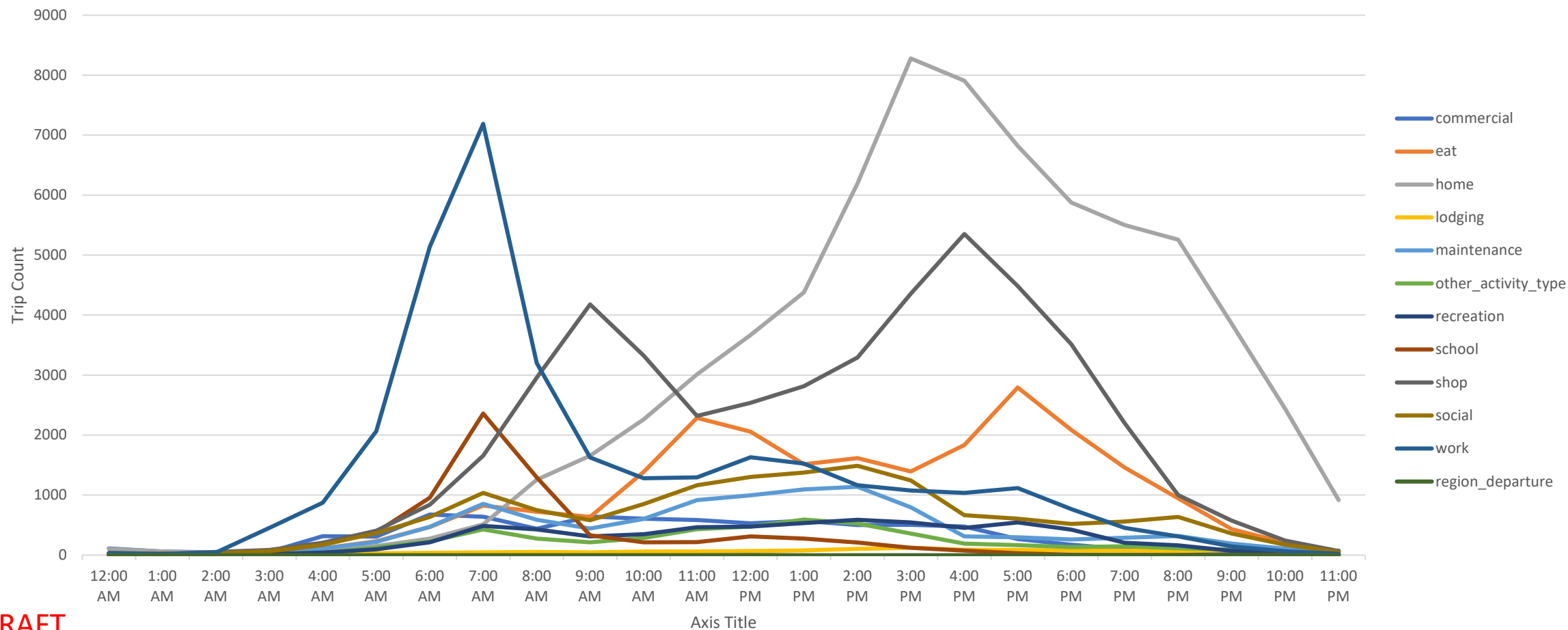
TCAG/KCAG Travel Demand Models

Population and Employment Growth

TCAG:
468,000 people by 2030
199,000 jobs by 2030

KCAG:
136,000 people by 2030
52,000 jobs by 2030

Legend

1 Dot = 1
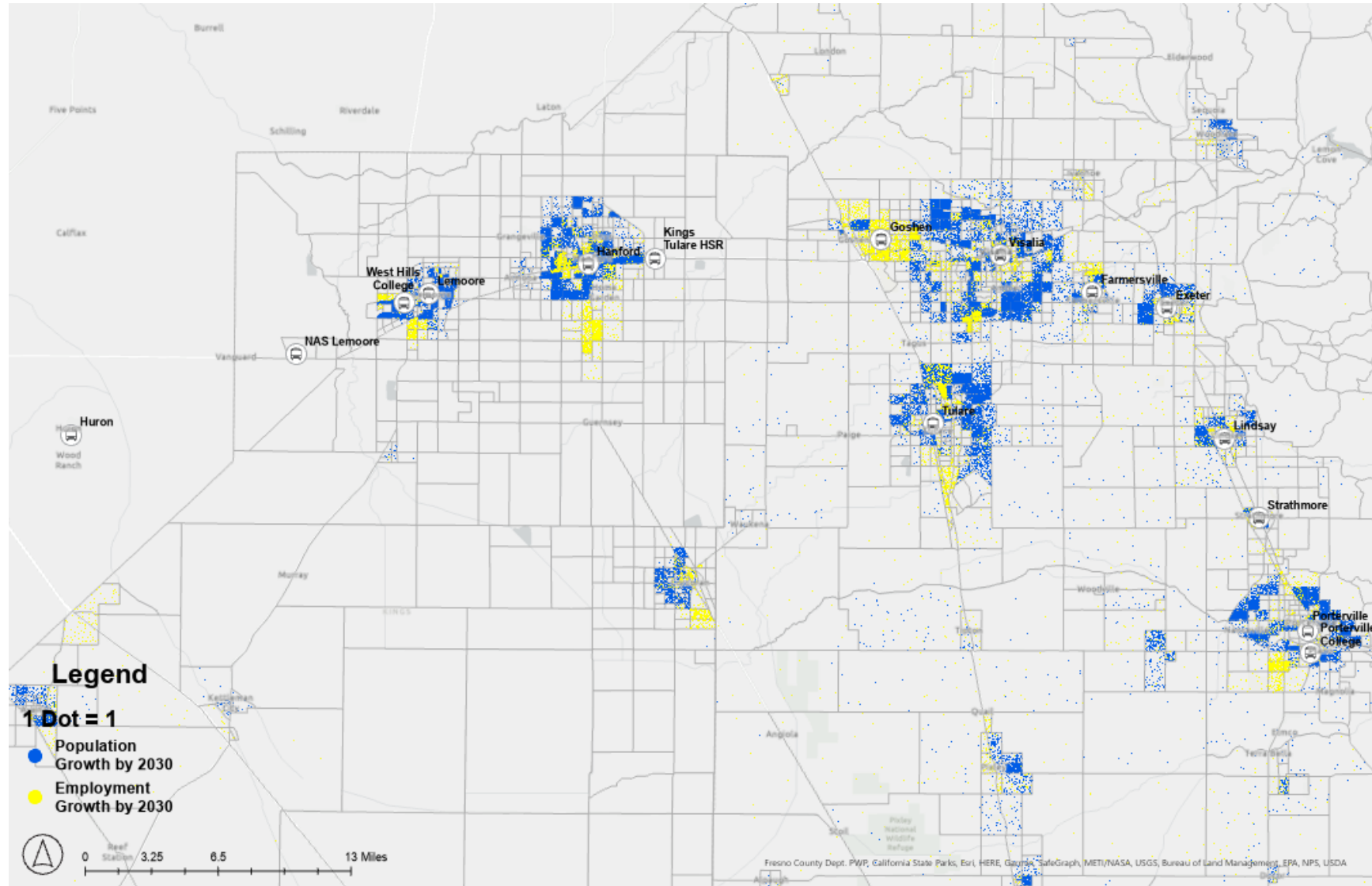- 2030 Population
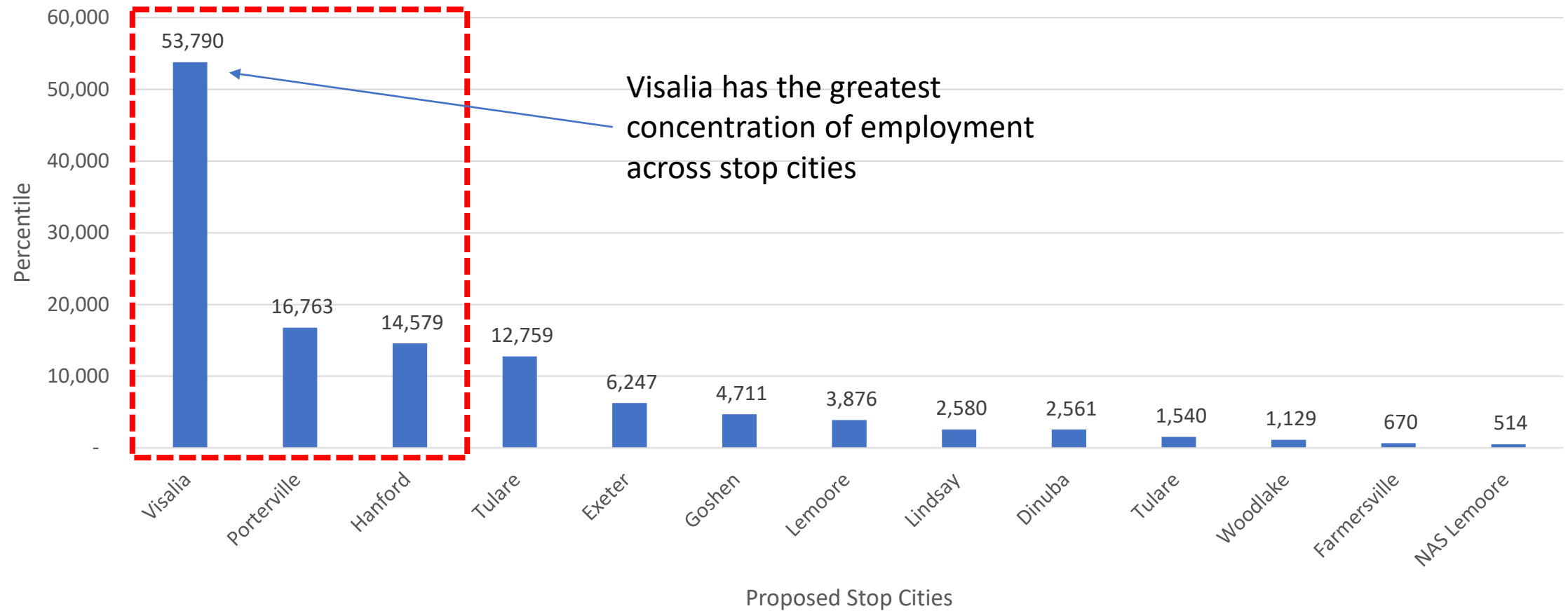- 2030 Employment
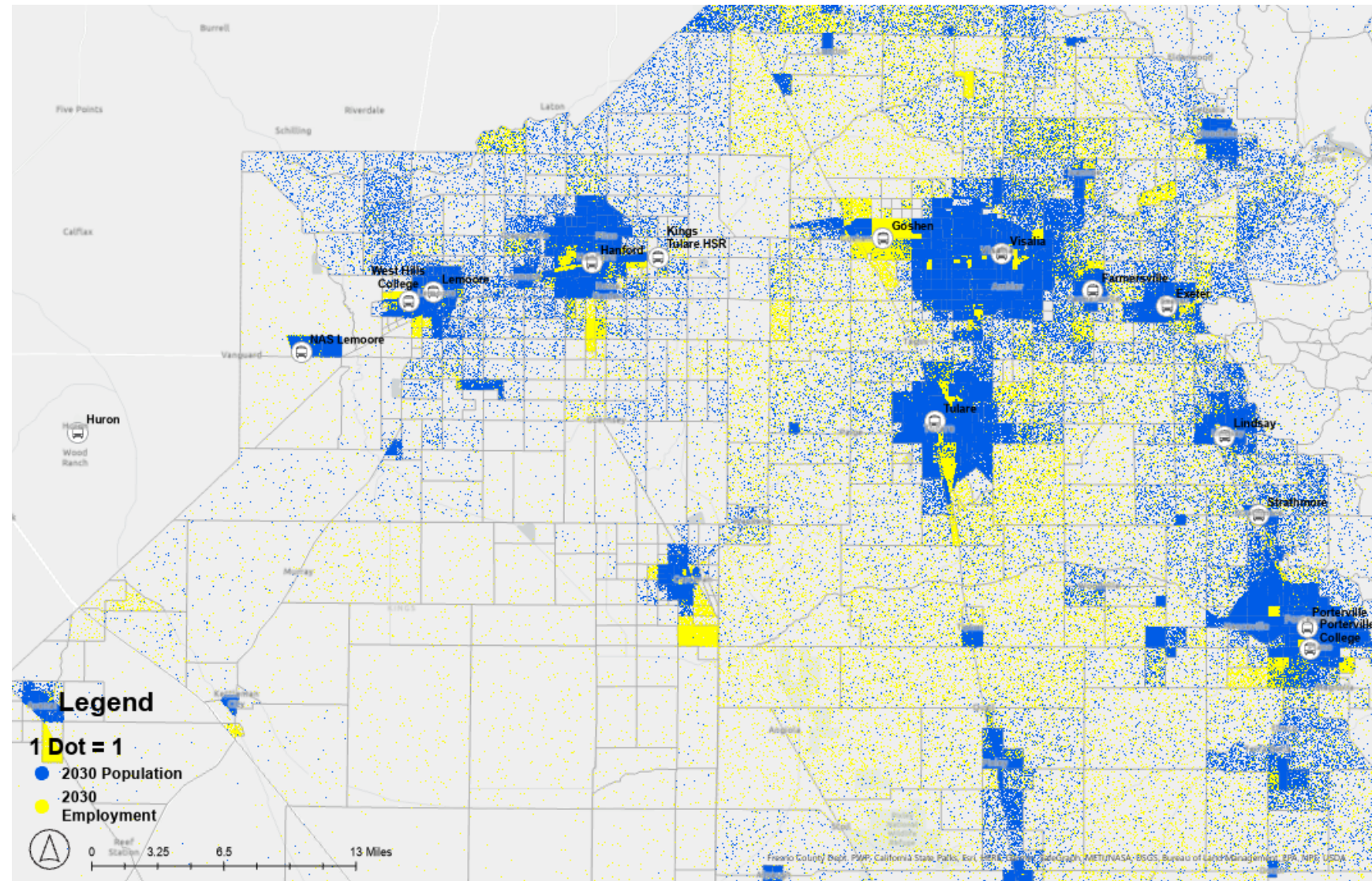
TCAG/KCAG Travel Demand Models

Population and Employment Growth

TCAG 2022 to 2030:
+32,000 population
+10,000 jobs

KCAG 2015 to 2030:
+13,000 population
+5,000 jobs

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Total Jobs

Visalia has the greatest concentration of employment across stop cities

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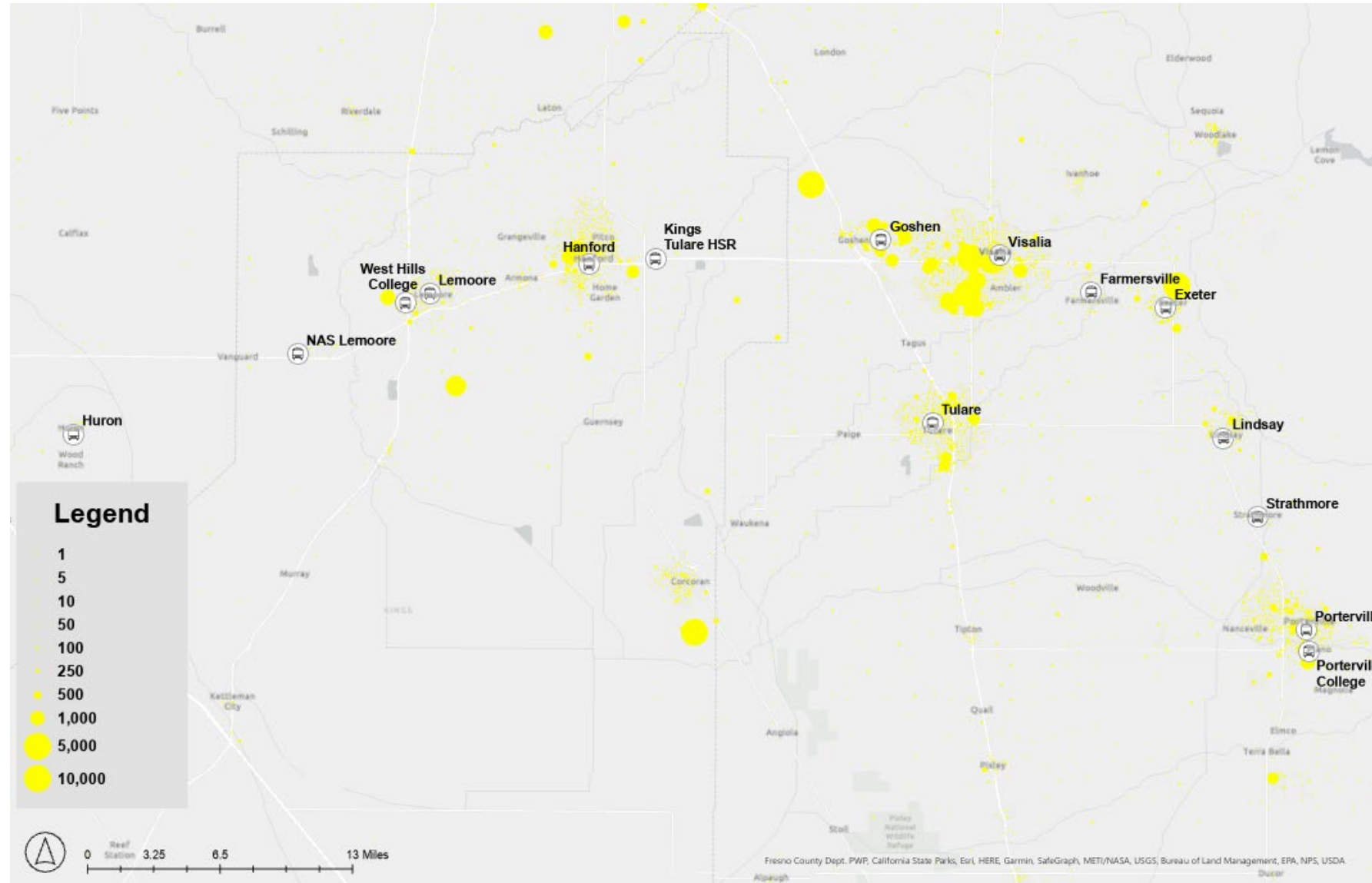
Total Jobs

~121,000 jobs in proposed stop cities

Total Jobs

VF Outdoor Distribution

California Dairies

Goshen

Tulare County Superior Court

Visalia

Kaweah Health Medical Center

Visalia Mall

Legend
1
5
10
50
100
250
500
1,000
5,000
10,000
Place Boundary

0   0.5   1   2 Miles

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Employment by Industry

Workers 16 Years and Over

Industry	Percentage
Educational services, and health care and social a...	22.3%
Agriculture, forestry, fishing and hunting, and mi...	11.3%
Retail trade	11.0%
Arts, entertainment, and recreation, and accommoda...	8.7%
Public administration	8.3%
Manufacturing	7.5%
Professional, scientific, and management, and admi...	6.4%
Transportation and warehousing, and utilities	5.2%
Construction	5.0%
Other services (except public administration)	4.3%
Armed forces	3.3%
Finance and insurance, and real estate and rental ...	2.9%
Wholesale trade	2.5%
Information	1.2%

Educational services, health care, agriculture, and retail are primary employment types by industry for top cities

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Employment by Industry

Workers 16 Years and Over

Legend (right side):
- Armed forces
- Public administration
- Other services (except public administration)
- Arts, entertainment, and recreation, and accommoda...
- Educational services, and health care and social a...
- Professional, scientific, and management, and admi...
- Finance and insurance, and real estate and rental ...
- Information
- Transportation and warehousing, and utilities
- Retail trade
- Wholesale trade
- Manufacturing
- Construction
- Agriculture, forestry, fishing and hunting, and mi...

Y-axis: Percent of Total Population (0% to 120%)

X-axis (Proposed Stop Cities): Huron, Farmersville, Dinuba, Goshen, Lindsay, Porterville, Woodlake, Hanford, Tulare, Exeter, Lemoore, Visalia, NAS Lemoore

Household Vehicle Access

No vehicle available

Bar chart titled "Percent of Population" (y-axis) vs "Proposed Stop Cities" (x-axis):

City	Percent
Huron	20.8%
Woodlake	12.3%
Farmersville	7.9%
Porterville	7.4%
Dinuba	7.2%
Lindsay	6.4%
Tulare	6.2%
Hanford	6.2%
Exeter	5.3%
Visalia	4.4%
Lemoore	3.9%
Strathmore	2.8%
NAS Lemoore	1.0%
Kings Tulare HSR	0.5%
Goshen	0.0%

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Languages Spoken

Speaks only English
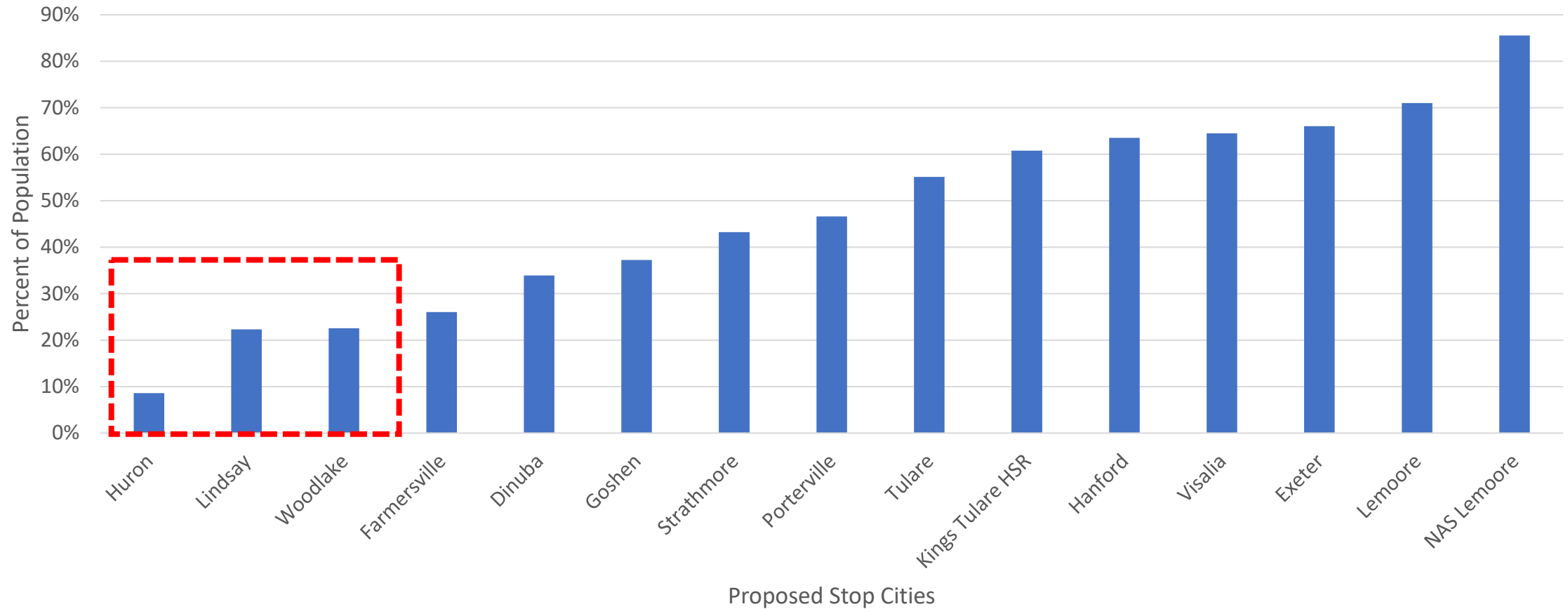
Senior Population
65+ years old
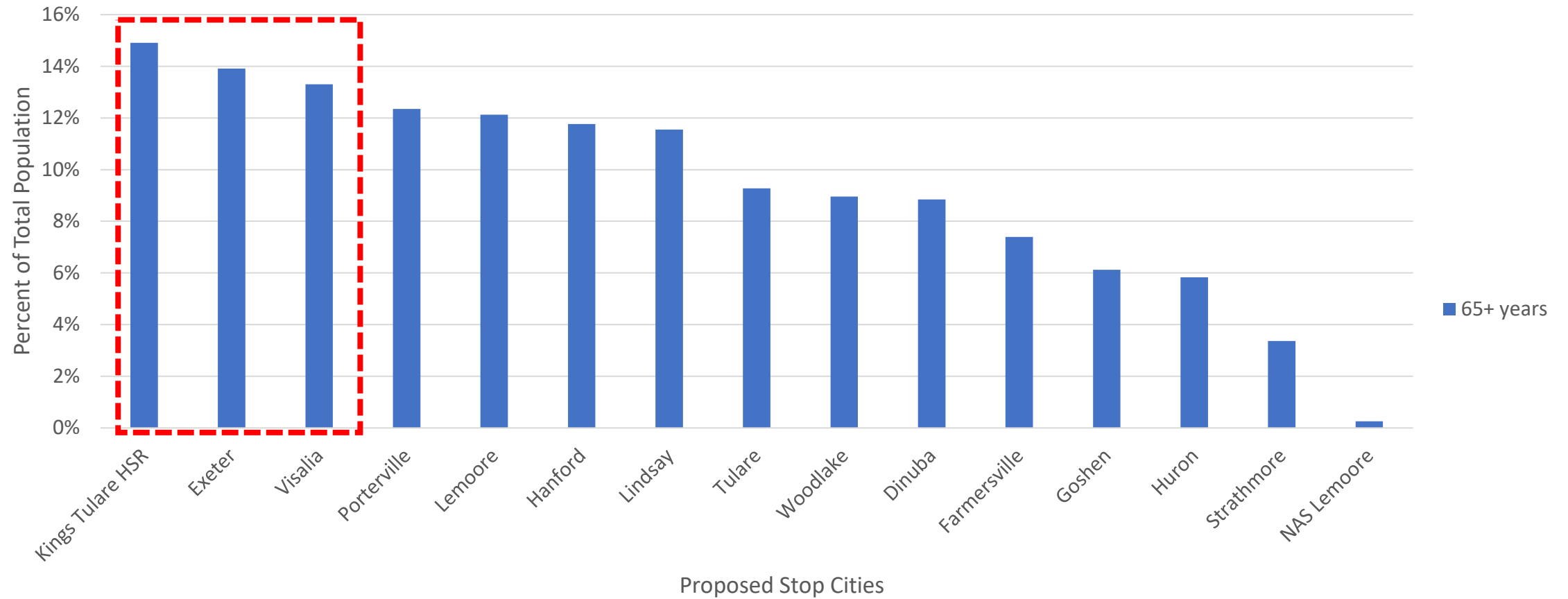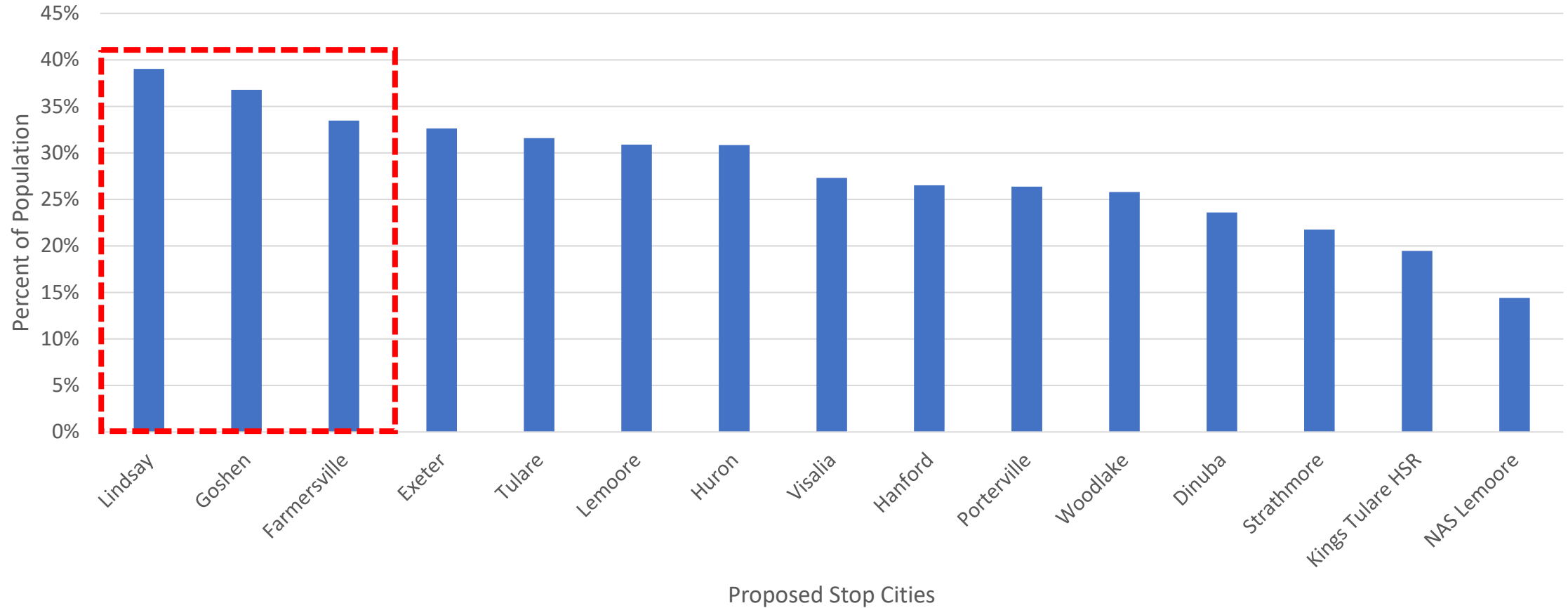
CVC Existing Fixed Routes
Operations Data FY 2021-22

| Route		Service Parameter					
		Passenger-Trips	Vehicle Service Hours	Vehicle Service Miles	Peak Vehicles in Operation	Operating Costs	Fare Revenue
KART	12	10,452	2,701	104,939	2	$292,120	$17,113
KART	15	6,062	815	31,751	1	$88,108	$18,557
KART	20	79,820	9,839	164,803	3	$1,064,199	$67,737
TCRTA	C10	48,893	7,209	188,390	2	$521,962	--
TCRTA	C30	46,611	7,384	213,972	2	$534,106	--
TCRTA	C40	37,553	7,709	207,759	2	$557,619	--
TCRTA	C90	3,332	1,509	42,376	1	$109,247	--
TCRTA	11x [1]	28,510	6,197	149,459	1	$652,643	--
Total		**261,233**	**43,363**	**1,103,449**	**14**	**$3,820,004**	**$103,408**

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CVC Existing Fixed Routes

Existing Fixed Routes in the CVC FY 2021-22 Ridership
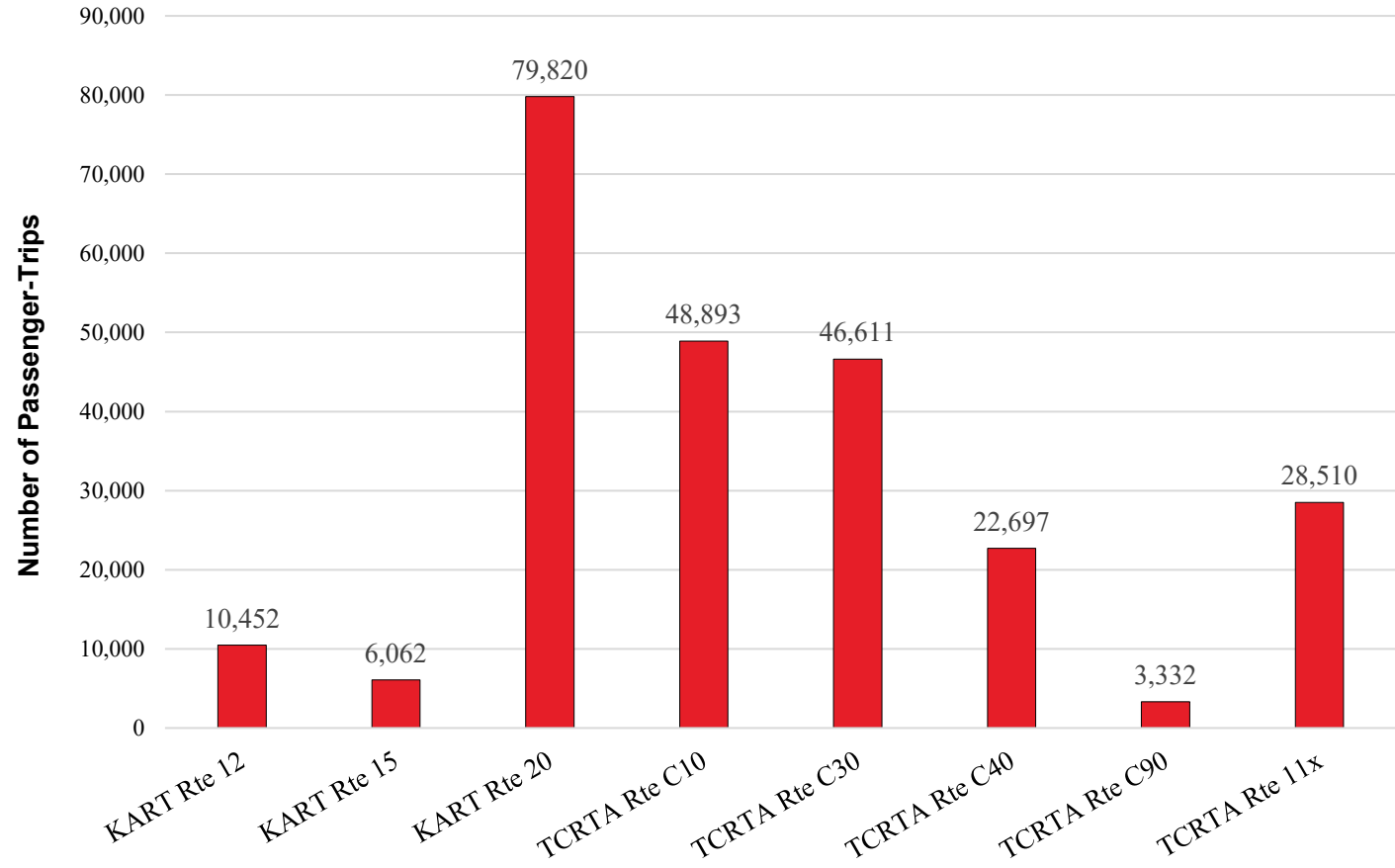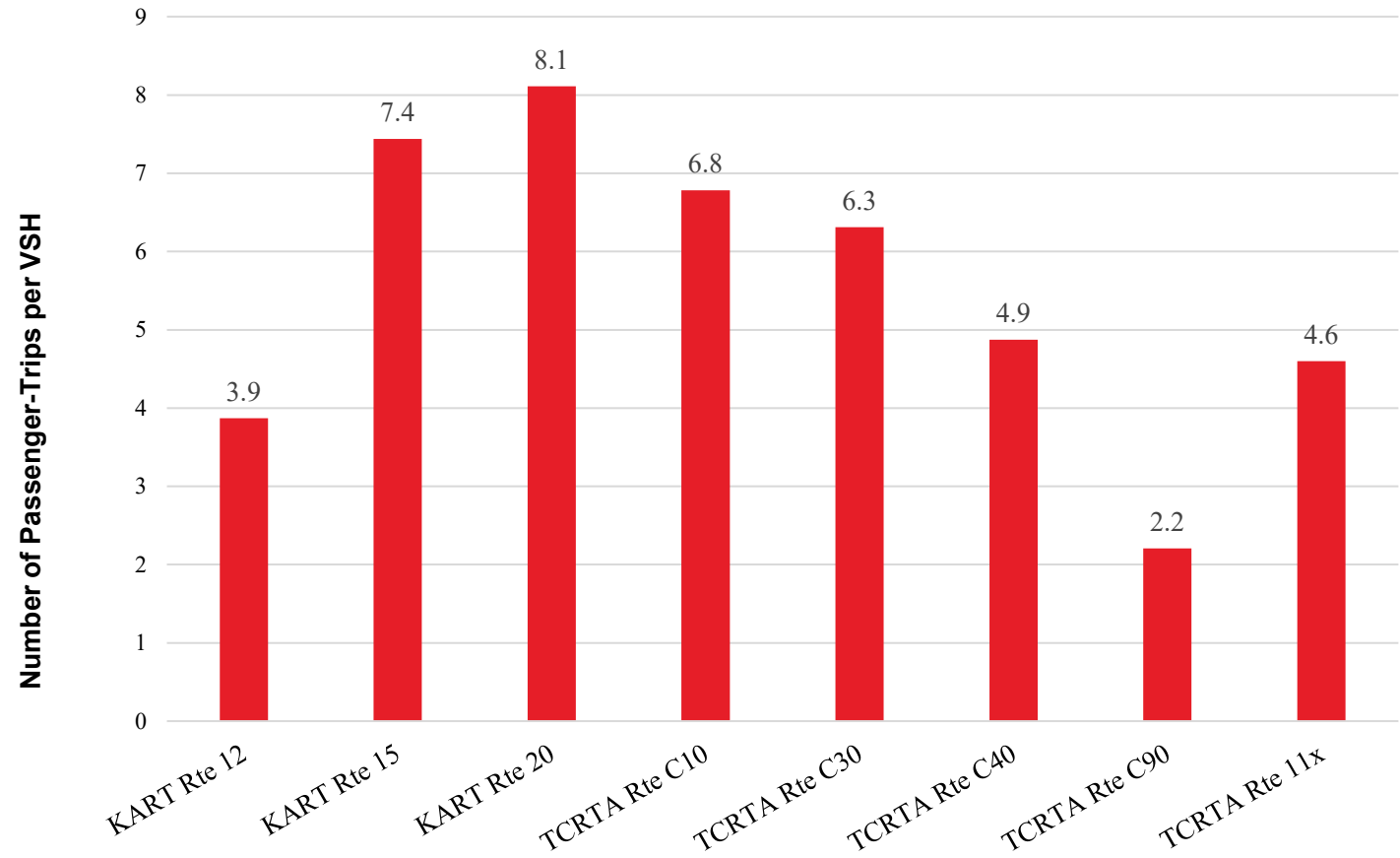

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CVC Existing Fixed Routes

FY 2021-22 Passenger-Trips per VSH

Next Steps

- Finalize stop locations based on existing conditions/market data
- TCAG/KCAG trip table summaries
- Estimate potential ridership ranges
- Summarize existing conditions within 2 mile buffer of stop locations
- Draft memo