Board of Directors Workshop
Existing Conditions and Guiding Principles

WEDNESDAY JULY 26, 2023

Presentation Overview

- Project Phasing and Key Project Elements

- Market Analysis & Origin/Destination (OD) Analysis

- Service Assessment

- Engagement and Survey Summary

- Key Findings

- Next Steps/Q +A

Realign Project Phasing

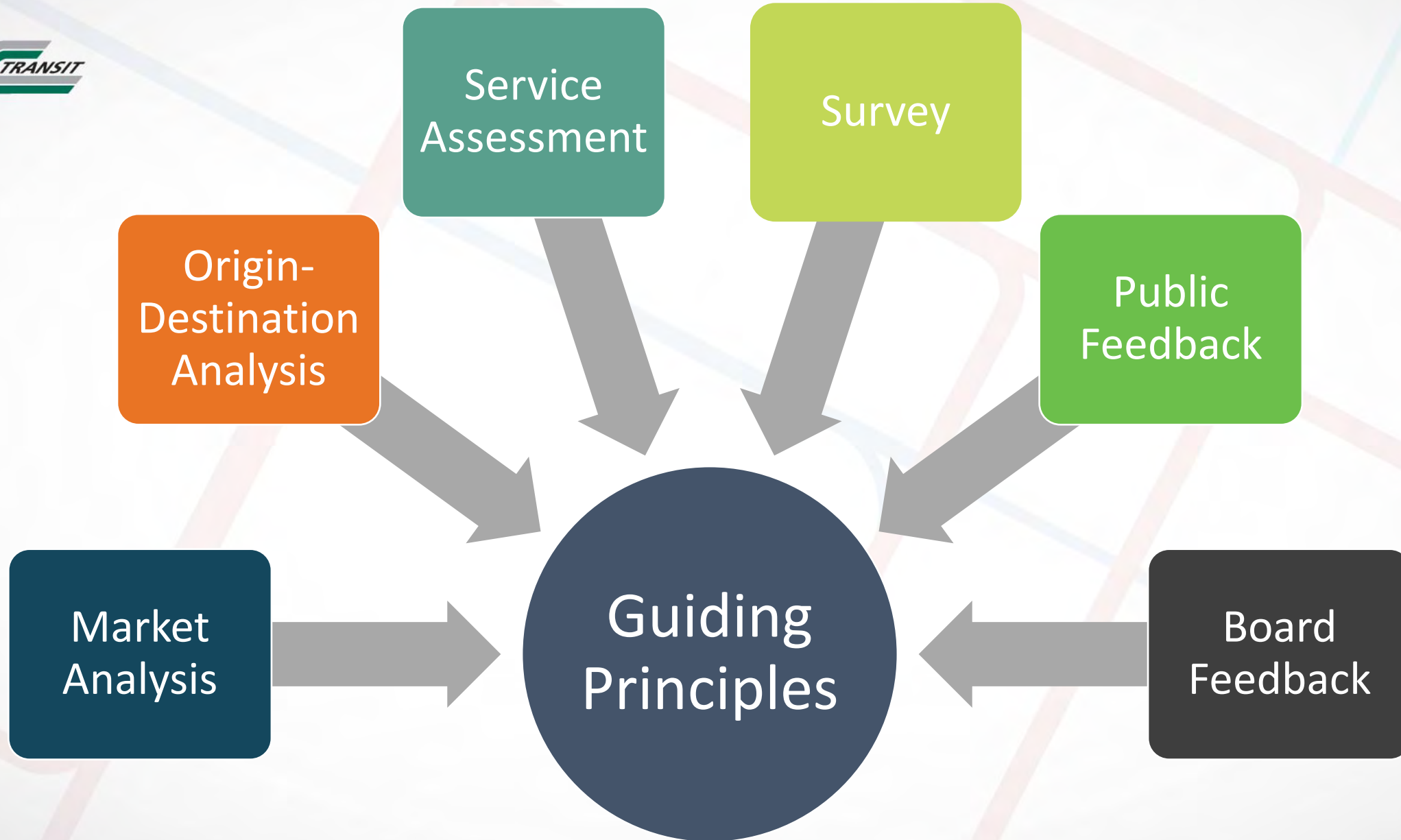| 1	2	3	4	5
Develop Plans + Learn Rider Needs	**Aligning Guiding Principles with Community Assessment**	**Develop Service Scenarios and Gather Feedback**	**Draft Final Service Plan and Plan Adoption**	**Develop Service Standards and Inform Riders about Service Changes**
Mar-Jun 2023	*Jul-Aug 2023*	*Sep-Dec 2023*	*Jan-Apr 2024*	*Apr-Sep 2024*

Key Project Elements (Phases 1 and 2)

Market Analysis & Origin/Destination (OD) Analysis

Population Change (2013-2021)

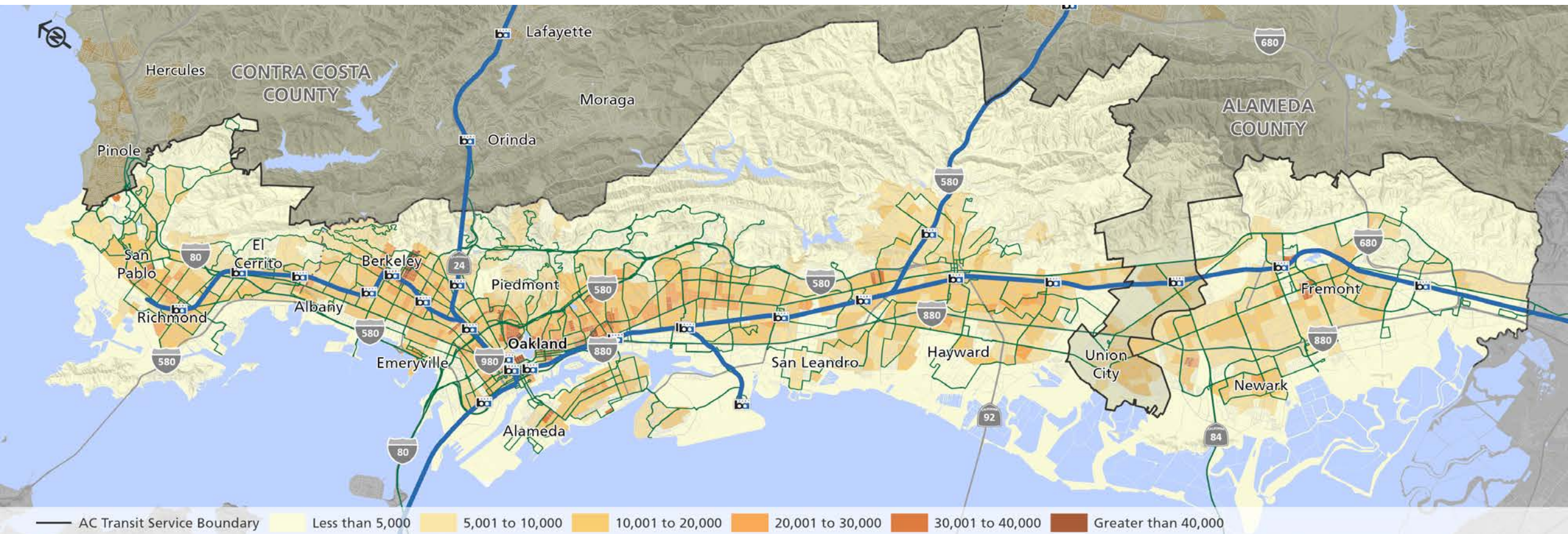American Community Survey 5-Year dataset

- 2013 Population: 1,522,000
- 2021 Population: 1,589,000
- 2022 – 2023 showing population decline
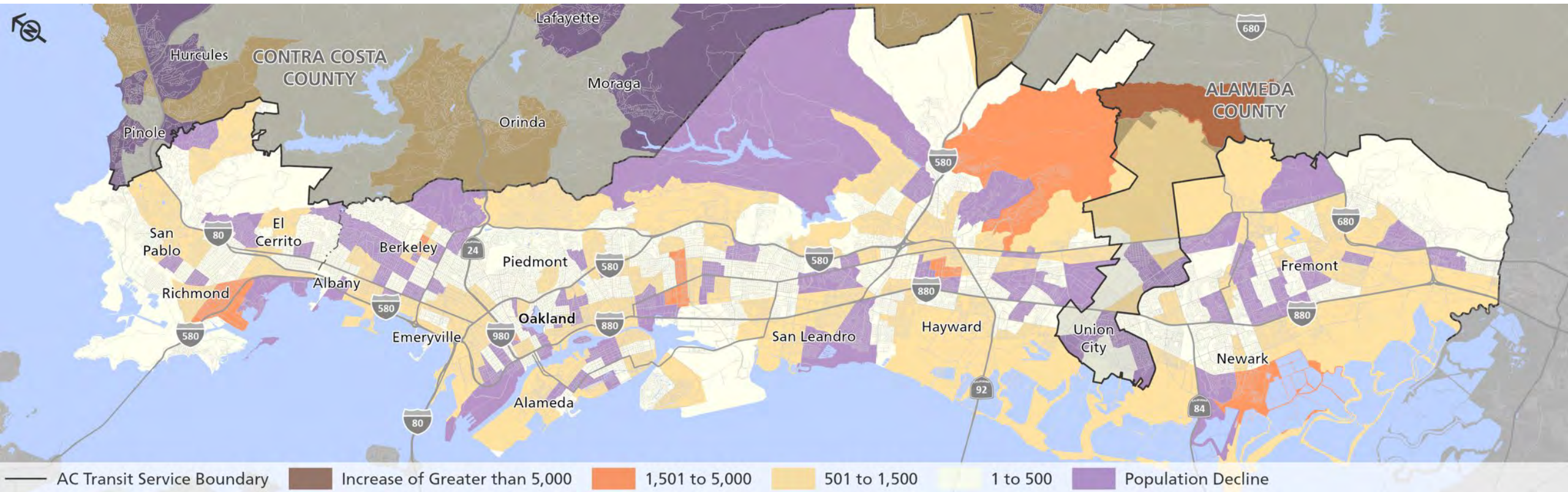
Population Density
(People per sq. mi.)
American Community Survey 5-Year dataset

- Densest areas are Downtown Oakland, East Oakland, and near UC Berkeley campus

AC Transit Service Boundary — Less than 5,000 — 5,001 to 10,000 — 10,001 to 20,000 — 20,001 to 30,000 — 30,001 to 40,000 — Greater than 40,000

Race & Ethnicity

American Community Survey 5-Year dataset

- Asian population grew the most from 2013-2021

- Black population has declined

| Racial/Ethnic Group	Share of Population (2013)	Share of Population (2021)	Change
Hispanic-Latino	25%	26%	1%
White	29%	27%	-2%
Black	14%	12%	-2%
Asian	26%	29%	3%
Other	5%	7%	1%
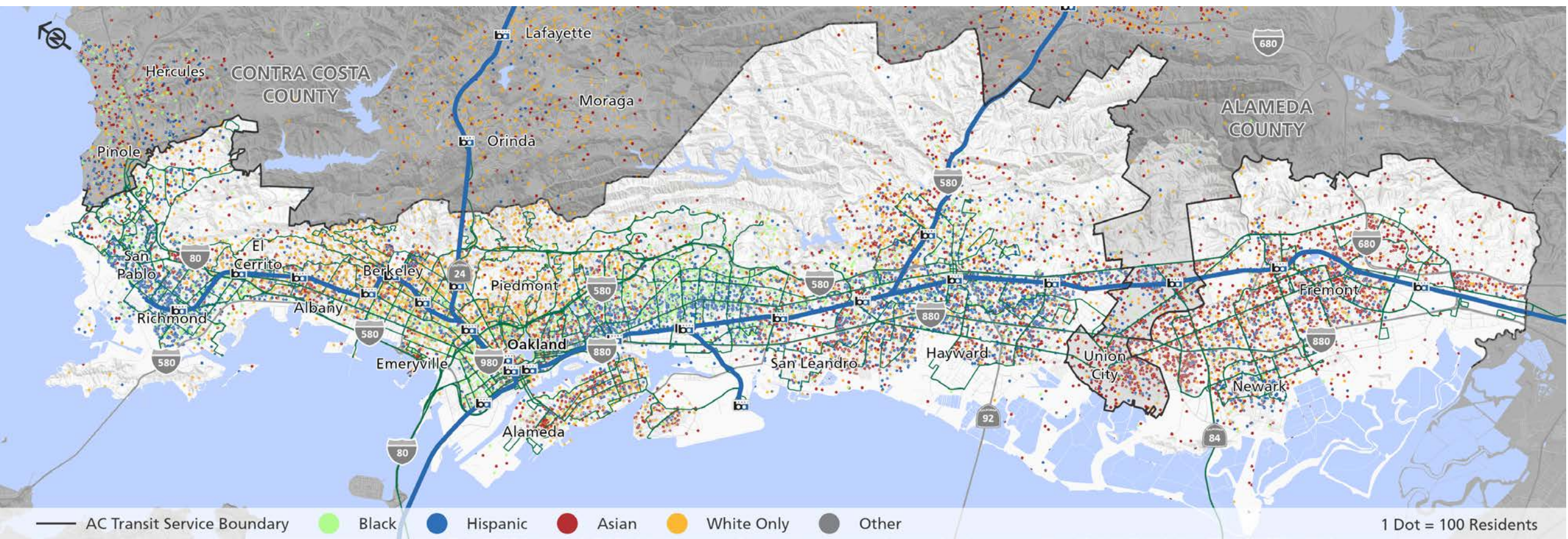
Changing Demographics

- Aging population
  - Share of older adults (65+) has increased
  - Share of youth (under 18) has decreased

- Displacement
  - Share of low-income households has decreased
  - Share of zero-vehicle households has decreased

Employment

Census Longitudinal Employer-Household Dynamics (LEHD), 2019

- Largest employment concentrations are in downtown Oakland, Berkeley, and Emeryville

- Hybrid and remote work have impacted trips to/from employment centers

AC Transit Service Boundary | Low Employment Density | High Employment Density
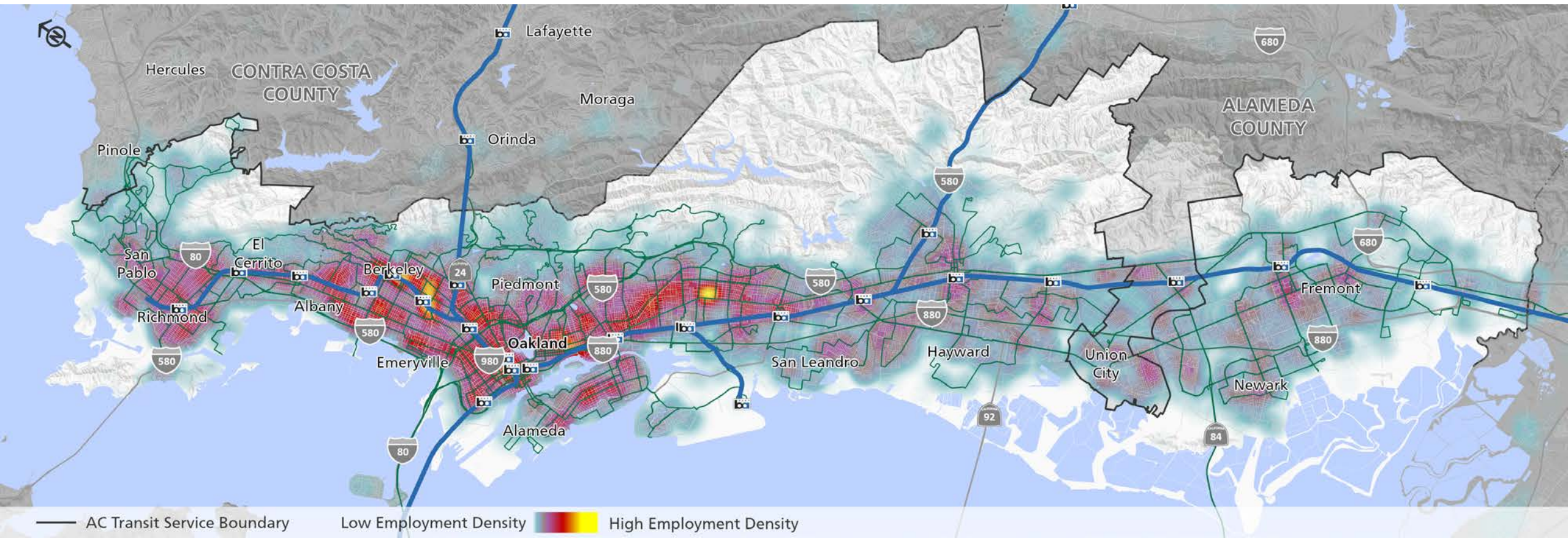
Planning Areas

- Four subareas/planning areas used for analysis

West Contra Costa County

Richmond-San Pablo-El Cerrito
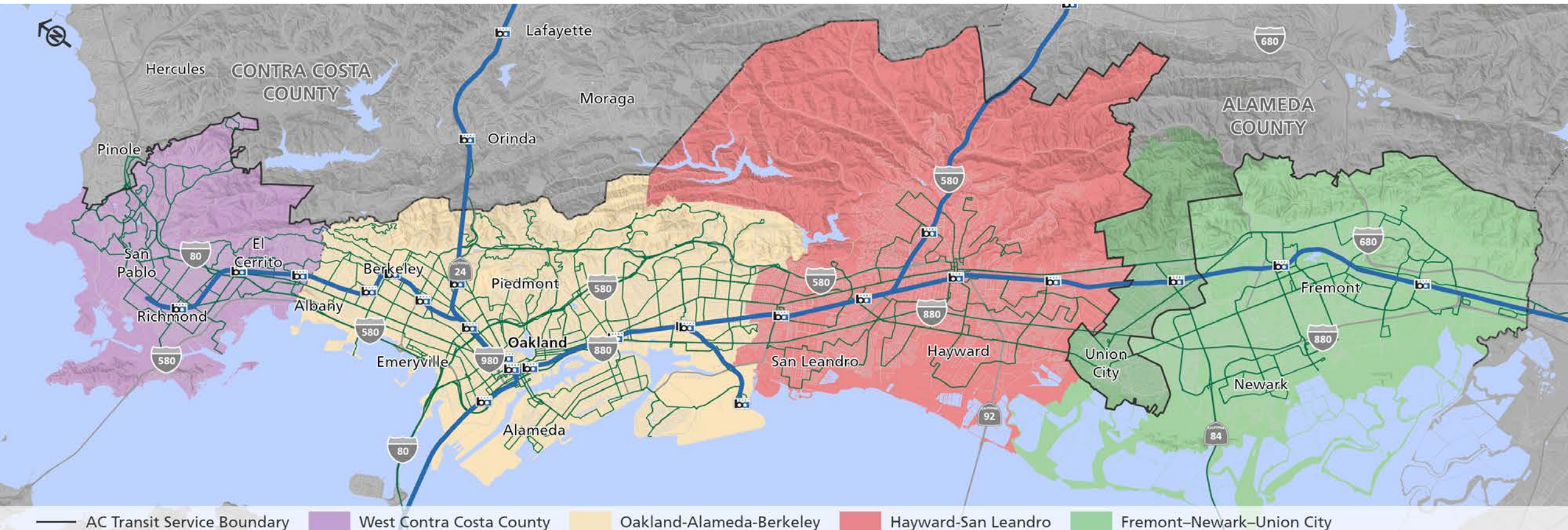(inc. North Richmond + Kensington)

Central Alameda County

Hayward-San Leandro-Eden Area

Northern Alameda County

Oakland-Alameda-Berkeley
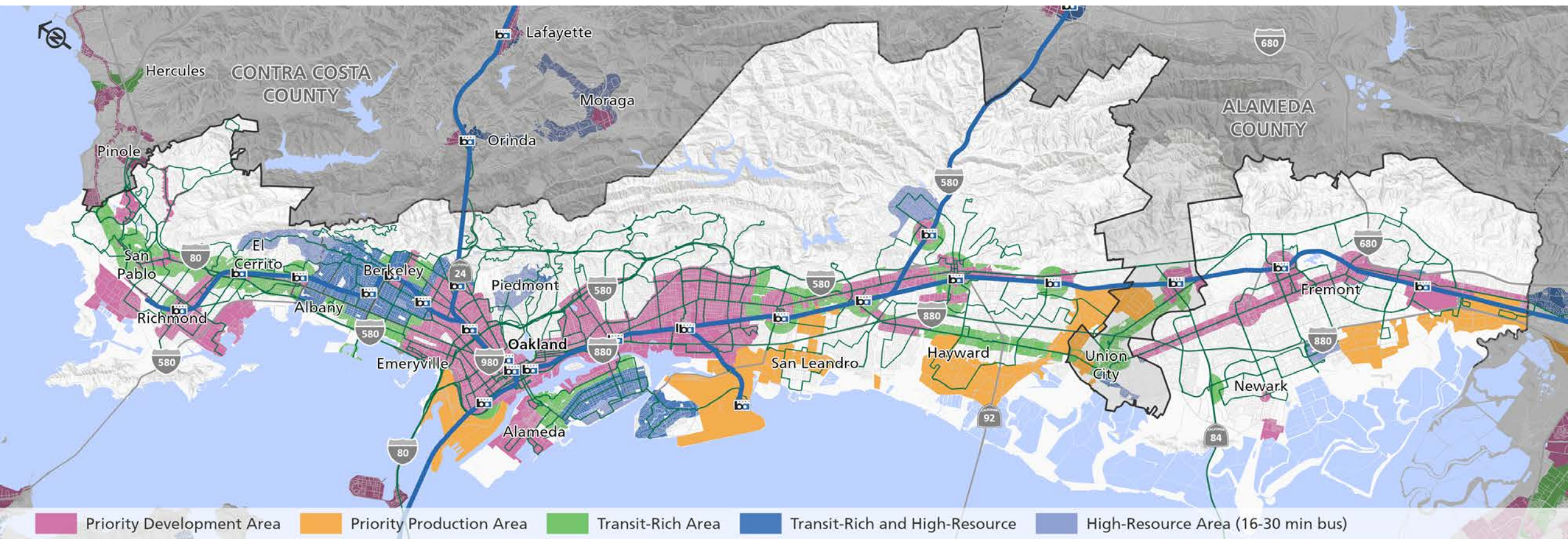
Southern Alameda County

Fremont-Newark-Union City

Growth Forecasts

- + 19% population growth forecast through 2035

- Plan Bay Area growth areas spread throughout service area

Planning Area	Year 2021 Population	Year 2035 Population	Change
West Contra Costa County	177,444	212,458	20%
Northern Alameda County	671,369	841,038	25%
Central Alameda County	395,787	419,908	6%
Southern Alameda County	344,006	424,753	23%
Service Area	1,588,606	1,898,157	19%

Legend: Priority Development Area | Priority Production Area | Transit-Rich Area | Transit-Rich and High-Resource | High-Resource Area (16-30 min bus)

Travel Markets 2019-22
Overall Trips, StreetLight Data

- More Vehicle Trips made in:

  - Richmond/San Pablo

  - East Oakland

  - South Hayward

Note: Vehicle trips include buses and heavy vehicles but not rail.

West Contra Costa County Subarea

Change in Vehicle trips, 2019 to 2022
- -55% to -30%
- -30% to -15%
- -15% to 0%
- 0% to 39%

—— AC Transit Service Boundary
·—·— County Boundary
········· City Boundary
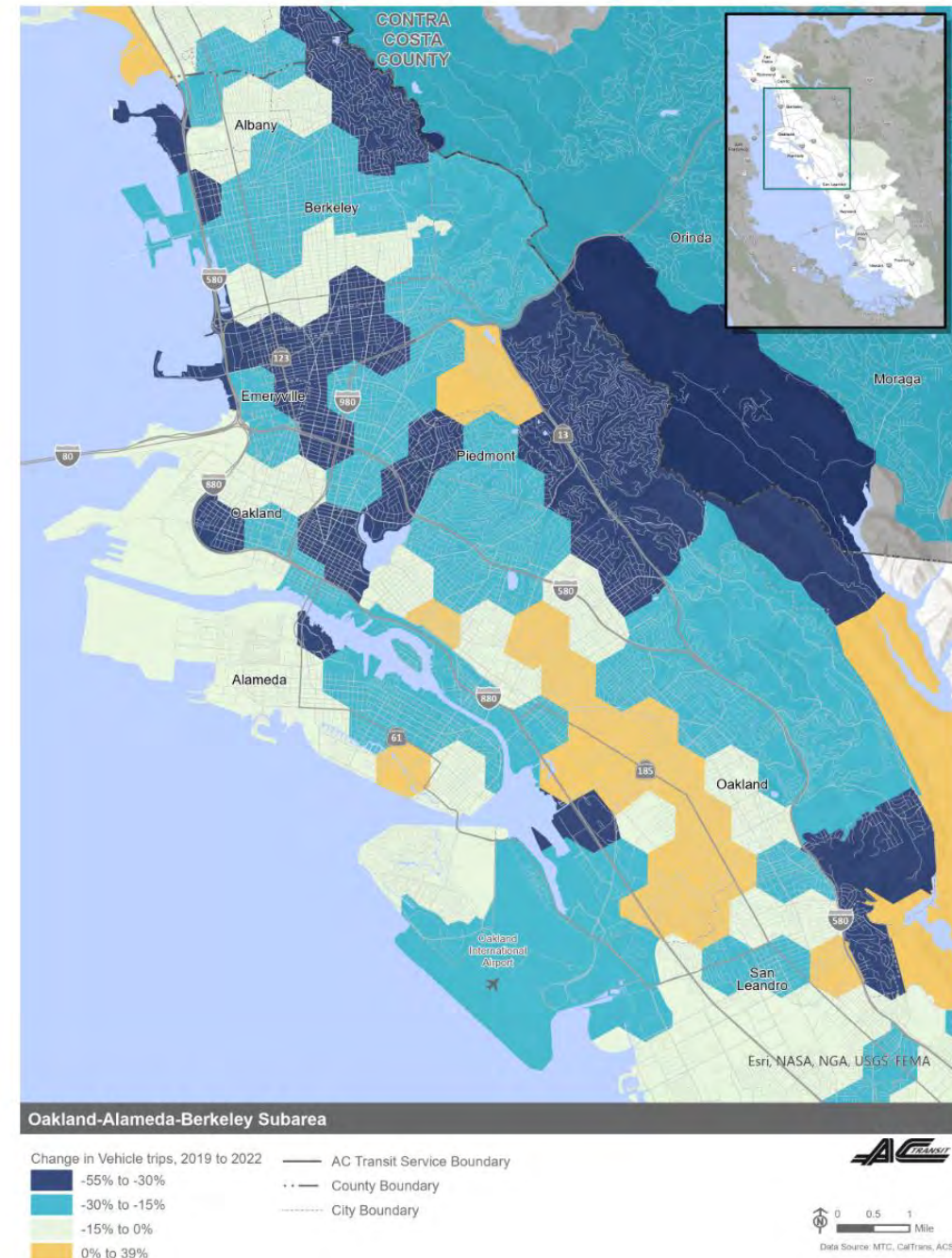
Data Source: MTC, CalTrans, ACS
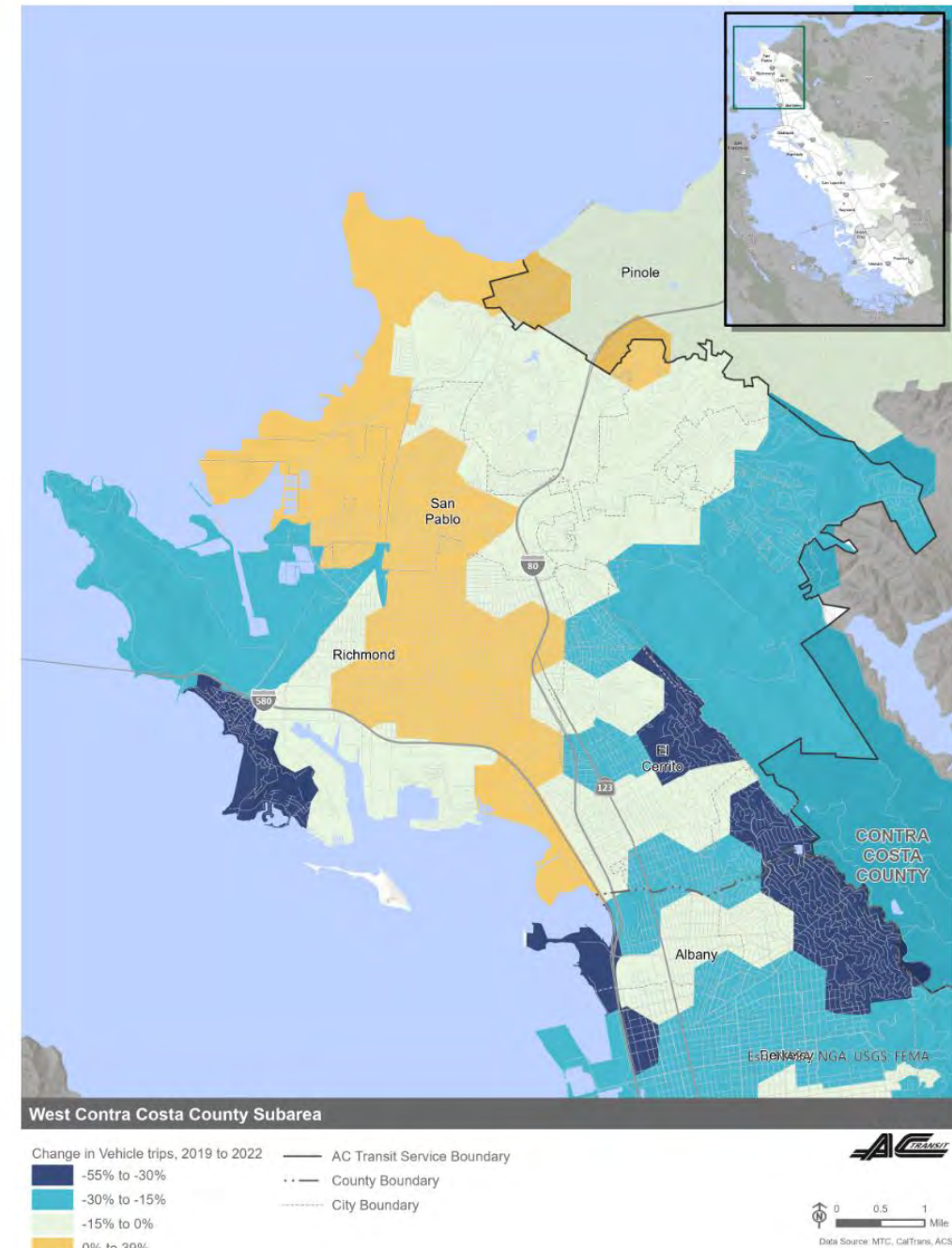
Travel Markets 2019-22

Overall Trips, StreetLight Data

- Fewer Vehicle Trips made in:

  - Point Richmond, Kensington

  - Downtown Oakland, North Oakland/Berkeley/Emeryville, Berkeley and Oakland Hills

  - Central Hayward

  - Mission San Jose, Ardenwood

Note: Vehicle trips include buses and heavy vehicles but not rail.

Oakland-Alameda-Berkeley Subarea

Change in Vehicle trips, 2019 to 2022
- -55% to -30%
- -30% to -15%
- -15% to 0%
- 0% to 39%

— AC Transit Service Boundary
-·- County Boundary
········ City Boundary

Data Source: MTC, CalTrans, ACS

Travel within Subareas/ Planning Areas

- 86% of vehicle trips that start within the AC Transit service area also end within the service area

- For each subarea, between 66-72% of vehicle trips stay within the subarea

- For travel by bus, 85-95% of trips stay within each subarea

Subarea/ Planning Area	Share of Trips Staying within Area	
	All Vehicle Trips	Bus Trips Only
West Contra Costa County	66%	87%
Oakland-Alameda-Berkeley	72%	95%
Hayward-San Leandro	67%	85%
Fremont-Newark-Union City	71%	89%
AC Transit Service Area	86%	99%

Note: Vehicle trips include buses and heavy vehicles but not rail.

15

Pandemic-Related Changes in Travel

Time of Day - Weekday

- Between Fall 2019 and Spring 2022, total vehicle trips within the AC Transit service area fell by 9%

- Travel decreased the most during the early AM and late PM periods

- Midday travel experienced the smallest decline compared to pre-pandemic conditions

Note: Vehicle trips include buses and heavy vehicles but not rail.

Weekday Time Period	Change from Fall 2019 Pre-Pandemic Trip Levels	
	Fall 2021	Spring 2022
Early AM (12 – 6)	-18%	-15%
AM Peak (6 – 10)	-8%	-12%
Midday (10 – 3)	-4%	-5%
PM Peak (3 – 7)	-9%	-8%
Late PM (7 – 12)	-23%	-15%
Daily	**-10%**	**-9%**

Pandemic-Related Changes in Travel

Time of Day - Weekend

- Weekend trips have decreased more post-pandemic compared to weekday trips

- Greatest decrease in weekend travel has occurred before 10 AM

Note: Vehicle trips include buses and heavy vehicles but not rail.

Weekend Time Period	Change from Fall 2019 Pre-Pandemic Trip Levels	
	Fall 2021	Spring 2022
Early AM (12 – 6)	-14%	-20%
AM Peak (6 – 10)	-15%	-24%
Midday (10 – 3)	-11%	-15%
PM Peak (3 – 7)	-11%	-14%
Late PM (7 – 12)	-14%	-14%
Daily	**-12%**	**-16%**

Pandemic-Related Changes in Travel

Activity Centers

- Between Fall 2019 and Spring 2022, total vehicle trips decreased the most for Downtown Oakland.

- Vehicle trips for South Fremont/ Warm Springs remain similar to pre-pandemic conditions.

Location	Change from Fall 2019 Pre-Pandemic Daily Trip Levels	
	Fall 2021	Spring 2022
Downtown Berkeley	-12%	-26%
Downtown San Francisco	-39%	-27%
South Fremont/ Warm Springs	-3%	2%
Oakland Airport	-26%	-24%
Downtown Oakland	-44%	-38%

Note: Vehicle trips include buses and heavy vehicles but not rail.

Market & Origin-Destination Analyses Takeways

- Population growth over the last decade relatively modest; characterized more recently by declines. Population growth taking place in select transit-oriented nodes.

- Aging population, fewer youth, fewer low-income households, fewer zero-vehicle households.

- Overall travel demand through pandemic increased in select locations trending towards lower incomes, more diversity, but decreased in most, especially in regional job centers.

Service Assessment

2019 vs. 2022 Comparison

- Ridership is at 64%, while resources are down to 85% of pre-pandemic levels.

- Service quality makes an impact:

  - Ridership on Line 1T is higher than ridership on pre-pandemic Line 1, on a similar amount of service

  - Productivity on 1T in 2022 is 35 percent higher than Line 1 in 2019

	Ridership	Hours	Productivity
Local	-20%	-9%	-12%
Transbay	-67%	-49%	-36%
Overall	**-36%**	**-15%**	**-15%**

Note: Analysis excludes school routes (600s) and Early Bird routes (700s)

2022 Productivity by Segment

(passengers per revenue hour)

- Highest productivity: Oakland and Berkeley
- Lower productivity: Suburban and low-density areas
- Line 51B is the highest performing route in the system, with a weekday productivity of over 60 passengers per hour.

Note: Analysis excludes school routes (600s) and Early Bird routes (700s)

AC Transit Service Boundary — Greater than 40 — 30 - 40 — 20 - 30 — 10 - 20 — 10 or Less
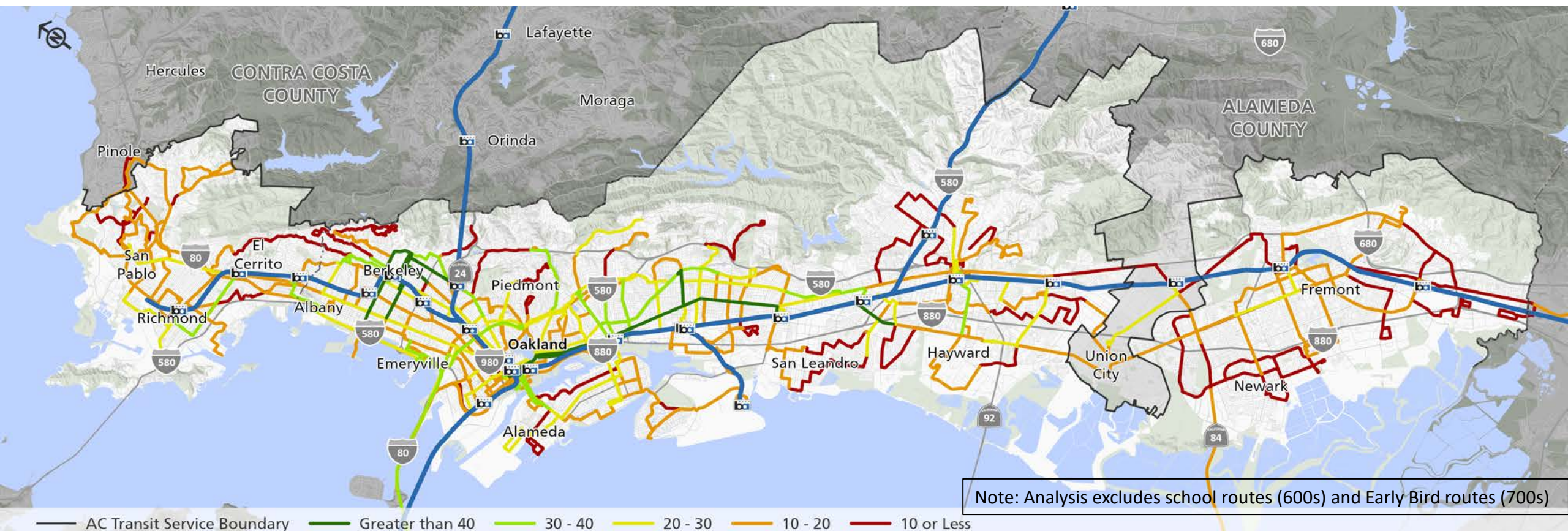
Suspended Lines

- Most lines yet to be recovered are Transbay lines.

- Transbay lines were, on average, hit harder by the pandemic than local lines, falling in productivity by 36 percent, three times as much as local lines.

- The Transbay lines that are currently operating were generally better performing lines :

  - In 2019, lines operating in 2022 had an average productivity of 27.7, compared to 25.5 for lines not operating in 2022
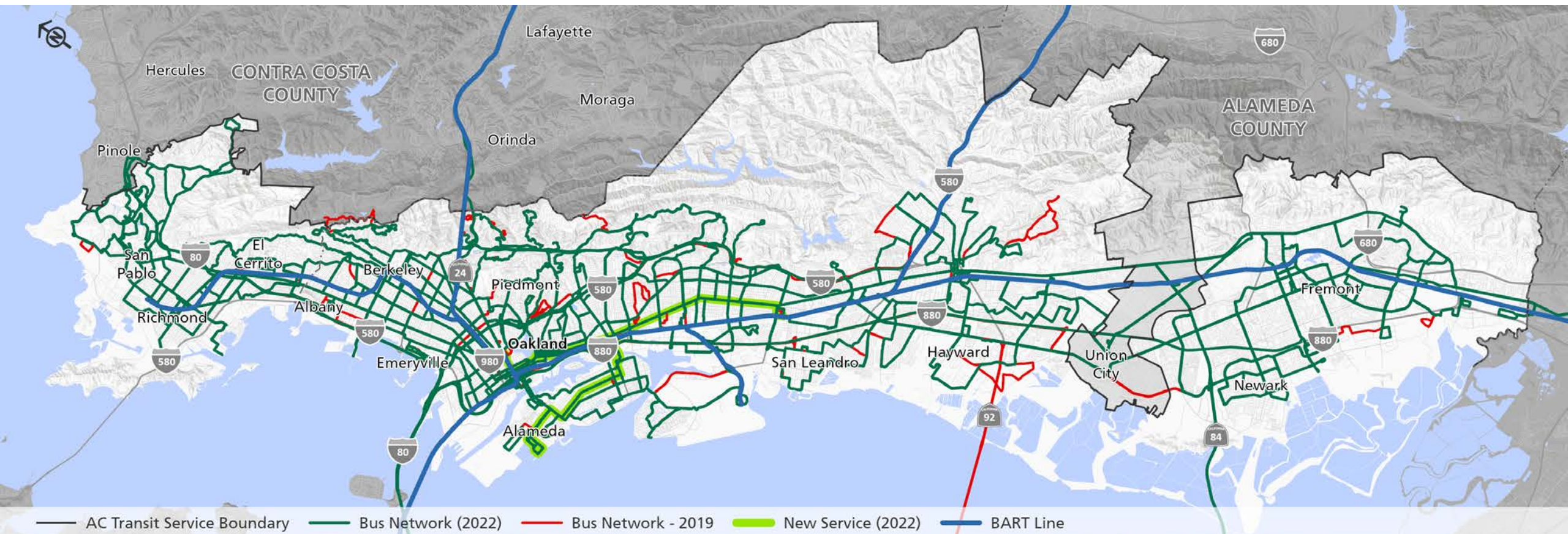
Travel Demand vs. Transit Use

Weekday time of day comparison

- Bus ridership is more concentrated in the AM and PM peaks

- Students traveling to and from school generate the heavy demand between 7 and 8 AM and 3 and 4 PM

- Overall travel demand has slight peaks

Percent of Total Trips vs Ridership

Legend: Bus Ridership, Total Bus Trips, Overall Travel Demand

24
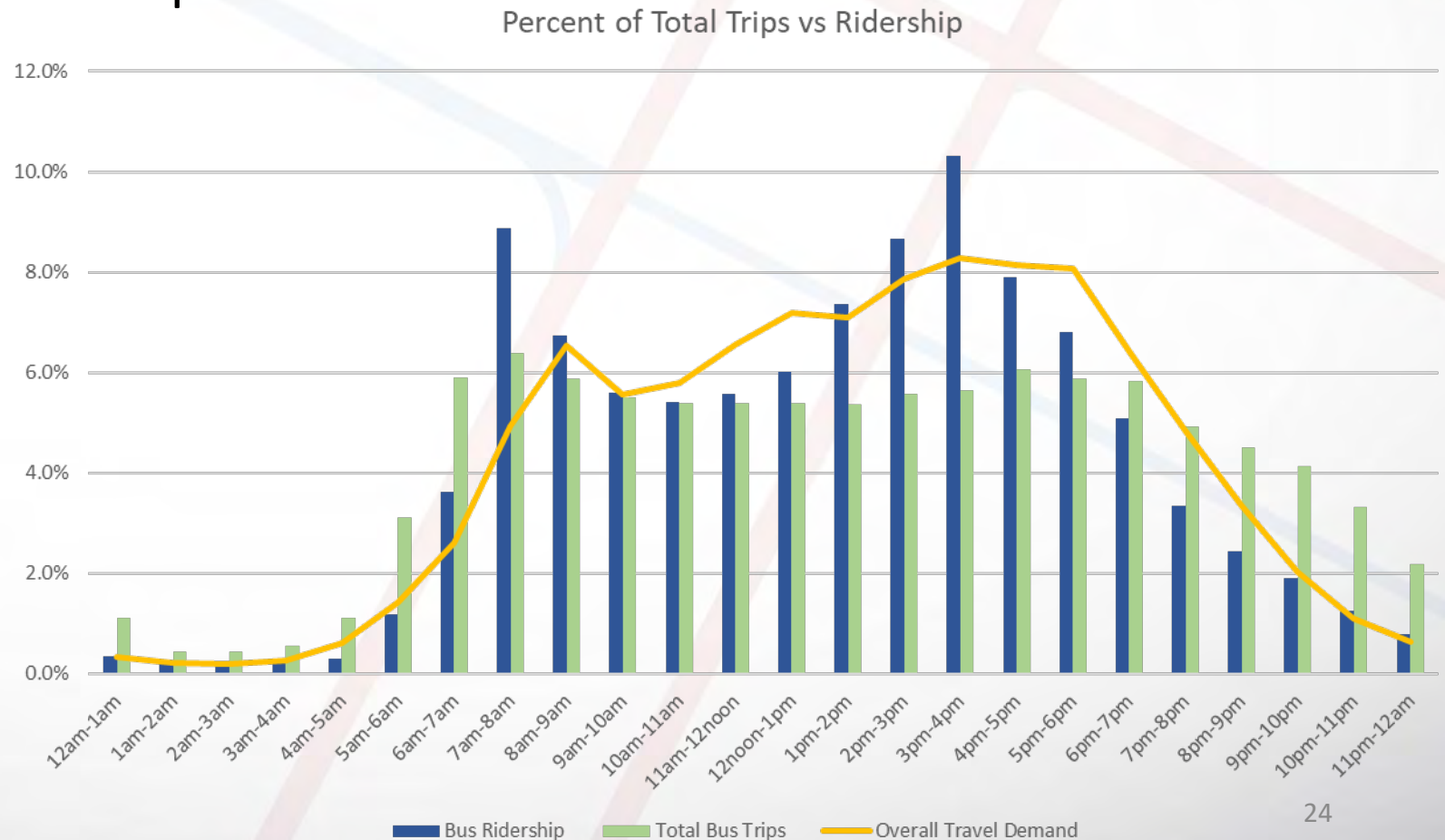
Service Assessment Takeaways

- Ridership declines relative to pre-pandemic seen across entire service area, but borne disproportionately.

- Strongest service productivity in our core service area in certain areas with targeted service quality enhancements.

- Transbay service productivity is disproportionately lower than local.

- Bus service levels provided throughout the day don't track perfectly with ridership patterns.

Public Engagement and Survey Results

Engagement Phase 1 – Survey Promotions

- Available online and printed surveys from April 17 through June 7, 2023.
- Summary of Strategies used to drive survey participation and awareness:

Website Project Page (actransit.org/Realign)	City Council Announcements
At Stop signage	District Breakfast Briefings
Rail hangers on buses	Community outreach and engagement
Ad cards on buses	• At bus stop/onboard bus intercepts
Promotional Postcard	• Community Based Organizations Partnerships
Promotional Postcards at libraries	• Community events/meetings (Pop-ups/Pop-ins)
Informational Boards for in-person meetings	• Outreach to policymaker & CBO list (1,000+)
eNews/AC Transit Social Media channels	• Project email and multi-lingual phone lines
On Facility Digital sign boards (Customer Service, Salesforce, BRT Platforms)	Printed surveys in English, Spanish, Chinese, Vietnamese

Phase 1 Engagement report by the numbers
PRINT

At Stop Signage:

10,150

Ad Cards on Buses:

1,350

Rail Hangers on Buses:

18,000

Promotional Posters:

40

Promotional Take-Ones:

25,800

Exhibit Boards:

20

(4 separate boards, 5 sets)

Phase 1 Engagement report by the numbers
MEDIA

El Mundo
CIRCULATION:
32,000

The Oakland Post
CIRCULATION:
55,000

Sing Tao Daily
CIRCULATION:
180,000

8
News
Articles

Phase 1 Engagement report by the numbers
DIGITAL

Website views to Realign page:

20,898
page views

(4th highest for site during that period)

	Twitter	Facebook	Instagram
Impressions:	20,861	7,481	1,471
Engagement:	395	538	35

31,564 Transit App Banner impressions

195 Online comments and suggestions submitted

Phase 1 Engagement report by the numbers
SURVEY COLLECTION

152
In-Person Survey Administration Events

Phase 1 Engagement report by the numbers
SURVEY COLLECTION

Survey Responses (valid completes)
15,718

14,583 Online Surveys

1,135 Paper Surveys

By language:

14,011 English

937 Spanish | **770** Chinese (Simplified + Trad.)

Limited Vietnamese

By geography:

7% West CoCo

58% Northern Alameda

11% Central Alameda

4% Southern Alameda

21% Unknown

Community-Based Organization Partners

Cherryland Community Assn.

Oakland Chinatown Chamber of Commerce

Community Resources for Independent Living

Glad Tidings Community Church

Black Cultural Zone

La Familia

The Latina Center

Genesis

United Seniors of Oakland – Alameda County

Upcoming Promotions – Phase 2 Outreach

Upcoming Activities – Phase 2 *(Partial List)*

Date	Activity (Upcoming – Phase 2: July 12 through August 18, 2023)
7/26/23	**AC Transit Board Workshop – Realign Survey results, Existing Conditions, draft Guiding Principles**
7/26/23	CBO Focus Group: Community Resources for Independent Living (CRIL)
7/28/23	Community Pop-up Event: Eden Night Live (Castro Valley/Hayward)
7/29/23	Community Pop-up Event: Unity in the Community (Free) Health & Wellness Fair (Richmond)
8/5 & 6/23	Community Pop-up Event: Fremont Festival of the Arts (Fremont)
8/12/23	Lived Experience Advisory Group (LEAG) Meeting #1 (Hybrid)
8/12/23	Community Pop-up Tabling: Foods Co (East Oakland)
8/12/23	Community Pop-up Event: Laurel StreetFair World Music Festival (Oakland)
8/15/23	Community Pop-up Event: South Berkeley Farmer's Market (Berkeley)
8/15/23	**Phase 2 Community Workshop (Virtual)** – Aligning Guiding Principles w/Community Assessment
8/18/23	Community Pop-up Event: Richmond Certified Farmer's Market (Richmond)
9/13/23	**AC Transit Board Meeting – consider approval of Guiding Principles**

Survey Responses

Why Do People Use AC Transit?

Purpose	Share of Riders	
	Pre-COVID	Currently
Work	59%	55%
Social	52%	50%
Shopping/Dining	40%	39%
Medical/Dental	26%	26%
School	23%	21%

- Trip purposes are generally today as pre-COVID

- Slight reduction in work and school travel

Note: Totals exceed 100% since people could select more than one answer.

Survey Responses

How Often Do You Ride AC Transit?

Frequency	Share of Riders	
	Pre-COVID	Currently
Most days (5-7 days per week)	39%	28%
A few times per week	20%	30%
A few times per month	14%	20%
A few times per year	12%	11%
Never	15%	11%
Total	100%	100%

- Riders are using AC Transit less post-pandemic

- Results are consistent with ridership analysis, which shows decline from 2019 to 2022

- Survey captured about 1,000 new riders post-pandemic

Survey Responses
Why Do People Use AC Transit?

- School trip purposes are highest in Fremont/Newark/Union City

- Medical/dental are highest in West Contra Costa County

- The largest decreases in using AC Transit for work were

  - 7% in West Contra Costa County
  - 5% in Oakland/Alameda/Berkeley

- Fremont/Newark/Union City saw 6% fewer people using AC Transit for work trips but also saw :

  - 3% increase in riders saying they use transit for all or most trips
  - 2% increase in shopping/dining trips

Survey Responses
When Would People Want More Service?

- When asked what time of day on weekdays was most important to have more service:
  - 53% ranked 10 am- 3 pm as their top option
  - 46% ranked 7 – 10 pm as their second option
- When asked what day of the week was most important to have more service:
  - 71% ranked more daytime Saturday service as their top option
  - 48% ranked more daytime Sunday service as their second option

Most Important Time of Day to Add More Service
(Percent ranked #1)
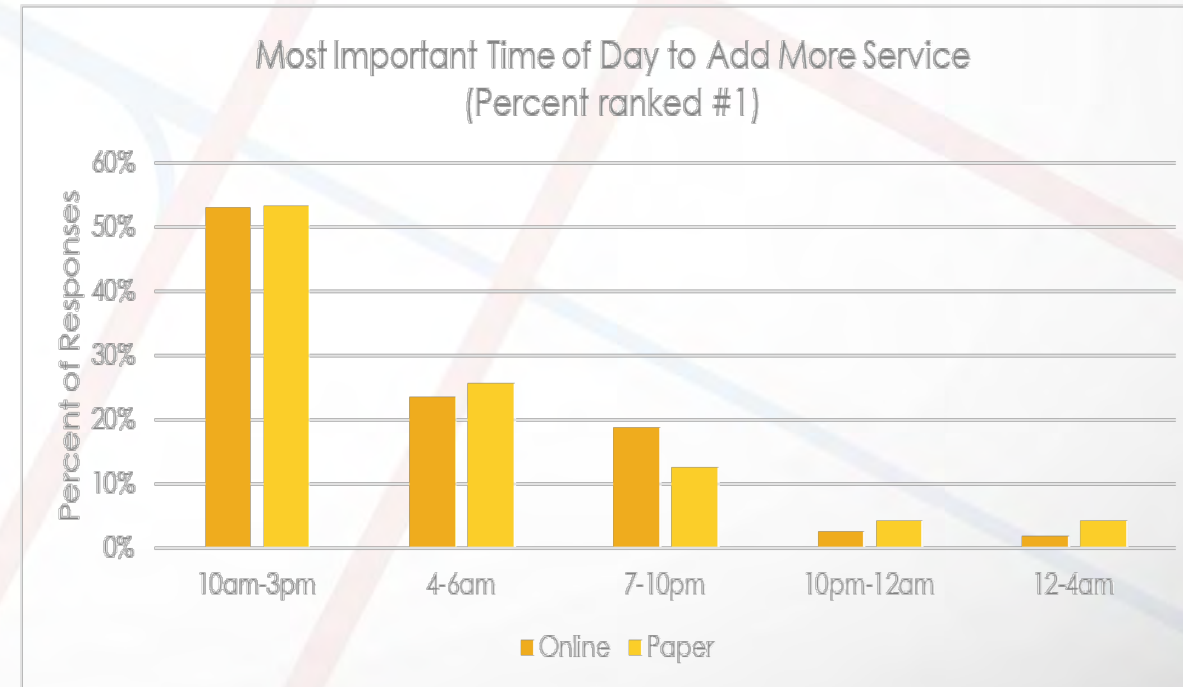
Survey Responses

Service Tradeoffs – Walk vs. Frequency

- More walking, less waiting, or less walking, more waiting?
  - Deviating buses off main streets can shorten walks to destinations, but makes trips on the bus longer.
- 60% overall prefer less waiting time even if it means a longer walk
- Responses vary by income and geography

Group or Demographic	Share who Prefer Shorter Wait/ More Frequency
Income more than $75,000	67%
Oakland-Alameda-Berkeley subarea	65%
Non-riders	63%
All responses	**60%**
Paper survey responses (inc. CBO collected)	51%
Income less than $35,000	50%
Hayward-San Leandro subarea	48%
Has a disability	40%

40

Survey Responses
Service Tradeoffs – Transfers vs. Frequency

- Fewer transfers, buses less often vs. more transfers, buses more often
  - A network built around transfers can free up resources to run more frequent service, but with more passenger trips requiring transfers
- 50/50 split overall
- Responses vary by income and geography

Group or Demographic	Share who Prefer More Frequent Service
Hayward-San Leandro subarea	63%
Paper survey responses (inc. CBO collected)	59%
Income less than $35,000	55%
All responses	**50%**
Non-riders	49%
Oakland-Alameda-Berkeley subarea	49%
Income more than $75,000	47%

Survey Responses
Service Tradeoffs – Frequency vs. Coverage

- Service on routes where people ride vs. wider geographic coverage
  - Concentrating service where more people ride makes the network more useful for more people, but puts fewer people within range of the network
- 60% overall prefer frequency over coverage
- Less variance by group/ demographic compared to other tradeoff questions

Group or Demographic	Share who Prefer More Frequent Service
Oakland-Alameda-Berkeley subarea	64%
Income more than $75,000	63%
Non-riders	62%
All responses	**60%**
Paper surveys (inc. CBO collected)	60%
Hayward-San Leandro and West Contra Costa County subareas	58%
Young adults (18-24)	57%

Survey Takeaways

- Respondents riding pre-pandemic and now use the bus for about the same reasons they did before.

- Respondents report riding less frequently.

- Respondents most prefer additional midday service and early morning and early evening service on weekdays, and additional service throughout the day on Saturdays, then Sundays.

Transit Trade-Off Takeaways

Responses all have distinct geographic differences.

- Walk vs. Frequency:
  - Overall, most prefer frequency against walk time (60%)
  - Among low-income individuals, Central County respondents (~50%)
  - Preference towards walk time among those with disabilities (~40% freq.)
- Transfers vs. Frequency:
  - Split overall (50%)
  - Frequency much preferred in Central County (63%)

Transit Trade-Off Takeaways

Responses all have distinct geographic differences.

- Frequency vs. Coverage

  - Overall, most prefer frequency against coverage (60%)

  - Much less variance between different demographic groups for this trade-off question.

Community Input Received

Key Themes for Realign

- Better service reliability

- Increased frequency on high-ridership routes

- More weekend service

- More weekday early morning and late evening service

- Restore pre-pandemic service levels

Community Input Received
Other Feedback Outside of Realign

- Cleanliness on-board vehicles is appreciated

- Current fares are too high for low-income households

- Improvements needed to AC Transit mobile app

- Improve cleanliness and lighting at bus stops

- Provide additional bike racks and bike lockers

- Both positive and negative feedback regarding driver behavior

Key Findings

Key Findings

- The AC Transit service area saw population growth during the last decade but is experiencing a slight decline post-pandemic.

- The makeup of the AC Transit service area is changing due to factors such as an aging population and displacement.

- Travel to and from employment centers is lower today than pre-pandemic; the degree of change varies by location.

Key Findings (cont.)

- Riders are using AC Transit less today than prior to the pandemic, but in general the trip purposes are the same.

- In general, customers value more frequent service when considering tradeoffs; however, results are mixed when accounting for demographics and subarea location.

- Customers value AC Transit's network coverage and mentioned more frequent and reliable bus service as areas for improvement.

Guiding Principles
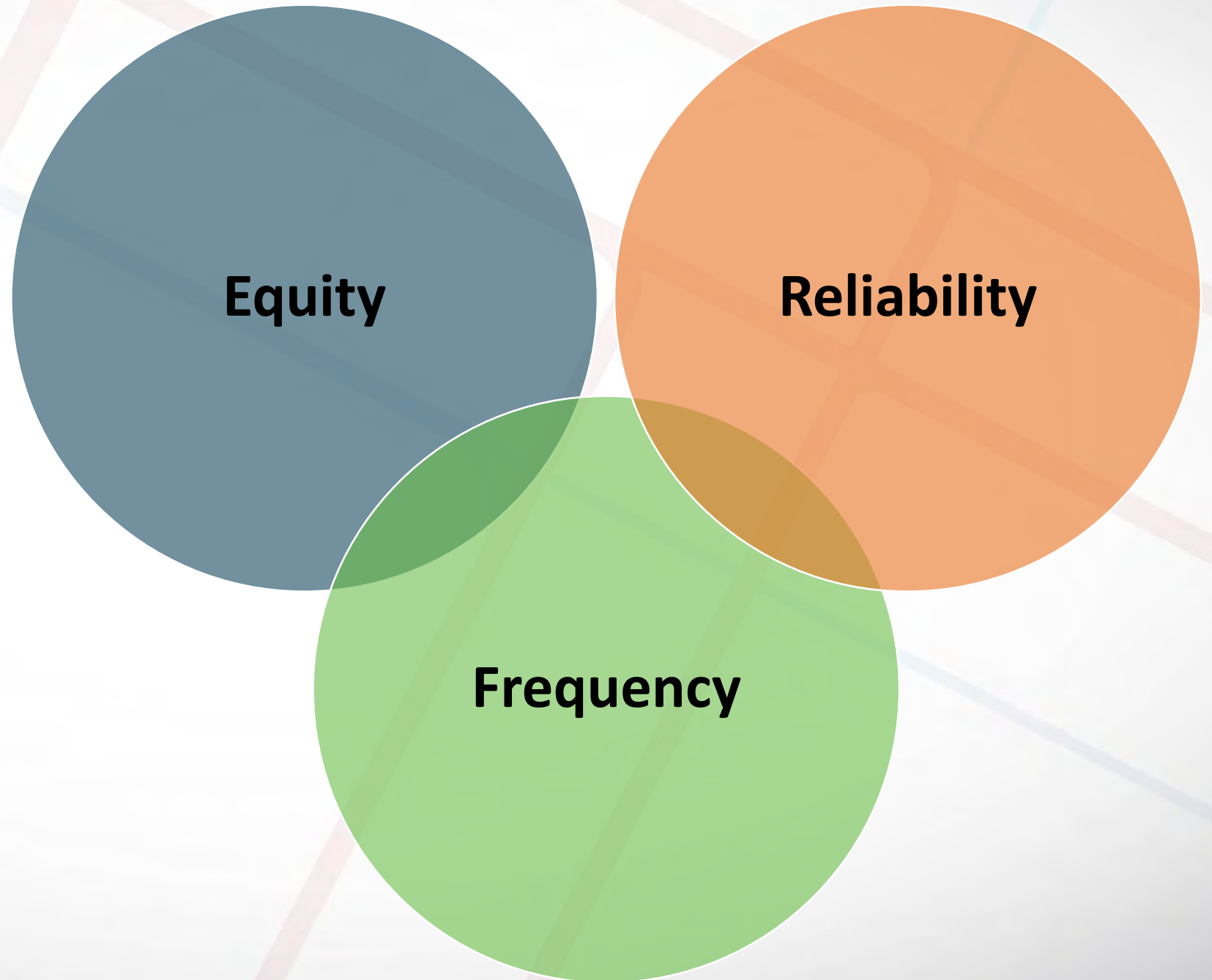
Equity

Provide a network that prioritizes mobility for communities who need it the most.

Background

- Cost of living, displacement, and gentrification make staying local difficult for low-income households.

- The service area is aging with fewer and fewer youth under 18.

- Feedback from engagement efforts underscored the importance for frequent service on busier routes throughout the week.

Intent

- Provide the greatest level of service where the greatest concentrations of mobility need exist.

Implementation

- Focus service within MTC Equity Priority Communities (EPCs) within AC Transit service area.

- Maintain or increase service within these areas, with the goal of providing high-frequency service (15 minutes or better) for all EPCs.

- Frequency or hours of operation may be reduced; suspended lines outside of EPCs would not be restored.

53

Reliability

Provide bus service that is reliable and predictable.

Background

- 39% of survey respondents identified reliability as an improvement area (the single most-mentioned area).

- Riders shared in person that they feel AC Transit bus service is unreliable and unpredictable.

- These trends track with continued operator availability issues.

Intent

- Provide adequate redundancy in operating resources to ensure that trips that are scheduled are operated.

Implementation

- Added buffer in schedules to account for traffic congestion or unforeseen delays.

- More resources spent on existing service means fewer resources available to increase service frequencies, expand hours of operation, or operate other existing service.

- Reductions in service levels may occur to ensure that trips can be delivered consistently and reliably.

54

Frequency

Provide frequent service to the most people; frequency's importance will vary by location and be balanced against geographic coverage and community needs.

Background

- Survey respondents marked more frequent service as the number one improvement that could improve their travel.

- Denser neighborhoods beget more riders, for AC Transit, most high ridership lines are in the densest parts in the system.

- Feedback from engagement efforts underscored the importance for frequent service on busier routes throughout the week.

Intent

- This principle is intended to provide the highest frequency service where the greatest demand exists while maintaining a network of high-frequency corridors (15 minutes or better) that includes all Planning Areas.

Frequency

Provide frequent service to the most people; frequency's importance will vary by location and be balanced against geographic coverage and community needs.

Implementation

- Focus service on higher-density areas according to ridership demand. Pre-pandemic service levels may be restored where demand exists.

- Implementation of frequent service to be balanced against geographic coverage, with at least one high-frequency corridor maintained in each sub-area.

- Transbay routes and school routes prioritized within Equity Priority Communities, but some routes may be reduced in favor of providing high-frequency service where the highest demand exists.

- Microtransit or other alternatives to fixed-route service may be explored in areas with low ridership.

Guiding Principles and Fare Policy

- All network design concepts will require some transfers.

- Network designs that prioritize frequency and/or minimal out of direction travel may require more transferring.

- Fare policy that penalizes transferring impacts service design options.

Next Steps

Q + A