

MEMORANDUM

July 6, 2023

Project #: 213850.003

To: David Berman, AICP, Senior Transportation Planner
Alameda-Contra Costa Transit District
1600 Franklin Street
Oakland, CA 94612

From: Kittelson & Associates, Inc.

RE: **AC Transit Realign: Existing Conditions Executive Summary**

Introduction

AC Transit Realign is an evaluation of AC Transit's existing bus service network in response to changing travel patterns. This quantitative and qualitative assessment of AC Transit's bus lines gathers both data and the rider feedback to develop a new network focused on riders and equity.

This memorandum summarizes the key findings of the existing conditions analysis. The analysis incorporates both technical analyses and community engagement; separate technical memoranda cover the following topics and provide more detail:

- Review of prior plans
- Market analysis
- Origin-destination analysis
- Existing bus service
- Existing ridership
- Customer survey
- Phase 1 community engagement

The findings of the existing conditions analysis will shape the development of guiding principles and service alternatives for evaluation.

The remainder of this memorandum summarizes the high-level findings for existing conditions.

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

As of 2021, the AC Transit district is home to an estimated 1,588,606 residents, with an overall growth rate of 4.4% from 2013 to 2021. Population growth was slowest in the Fremont–Newark–Union City subarea (1.0%), while the other three subareas grew at similar rates. Between 2013 and 2021, the City of Oakland's population increased by almost 28,000 residents, more than three times any other jurisdiction.

Population estimates from the State of California Department of Finance show that most cities in the service area have experienced a population decrease from 2022 to 2023, with the largest estimated decreases occurring in Oakland (-2,250 residents), Richmond (-1,003), and Union City (-966).

Plan Bay Area forecasts for the AC Transit service area project a population increase of 19% between 2021-2035 and 30% between 2021-2050. The Oakland-Alameda-Berkeley subarea is forecast to experience the greatest population growth, while the Hayward–San Leandro subarea is forecast to have slower population growth compared to the other subareas.

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

Between 2013 and 2021, the proportion of residents 65 and older has increased throughout the service area by an average of 2.5 percentage points. During the same period, the percentage of residents under 18 has decreased by 1.2 percentage points. For both groups, the greatest change occurred in the Hayward-San Leandro subarea.

Between 2013 and 2021, the share of low-income households decreased by almost nine percentage points (30.8% to 21.9%). The share of zero-vehicle households within the service area also decreased by 1.6 percentage points during this period. These declines may be attributed to a greater occurrence of urban displacement and gentrification as housing costs increased during the last decade.

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

Employment within the AC Transit service is more concentrated when compared to the distribution of residents. Based on year 2019 data, the largest concentrations of employment within the service area are in downtown Oakland, Berkeley, and Emeryville, with smaller concentrations found in areas such as Oakland International Airport, west San Leandro, Union City, and Fremont.

In 2019, about 43 percent of AC Transit service area residents worked within Alameda County, while about 16% of residents worked in San Francisco and 12% worked in Santa Clara County.

Post-pandemic shifts to hybrid and remote work have reduced trips to and from employment centers. The StreetLight origin-destination analysis found that vehicle travel to/from Downtown Oakland has decreased by about 40% between pre-COVID (September/October 2019) and post-COVID (March/April 2022) conditions. Other significant decreases were to/from Downtown San Francisco, Downtown Berkeley, and Emeryville, where total vehicle trips dropped by more than 23% for each of these areas.

In contrast, employment centers in San Leandro, Union City, and Fremont have experienced smaller decreases in vehicle trips between pre-COVID and post-COVID conditions.

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

Both the ridership analysis and customer survey show that riders are using AC Transit less than they did pre-pandemic.

Pre-pandemic, 39% of survey respondents used AC Transit 5-7 days per week; this dropped to 28% post-pandemic. Of the respondents who rode 5-7 days a week pre-pandemic, only 46% still ride that frequently; 30% now ride a few times per week and 14% only a few times per month.

The ridership analysis found that Fall 2022 shows weekday ridership is down approximately 26 percent compared to Fall 2019 (600 and 700 series routes were excluded from the analysis).

The customer survey did not show a significant shift in pre- and post-pandemic trip purposes. Currently 55% of respondents use transit for work, 50% for social or recreational activities, and 39% for shopping and dining. The largest change was in work trips which declined from 59% pre-pandemic. This is expected given the large increase in people working from home over the last three years.

In general, customers value more frequent service when considering tradeoffs; however, results are mixed when accounting for demographics and subarea location.***Frequency versus Walk Distance to Bus Stop***

Overall, 60% of respondents prefer shorter wait times (better frequency), even if it means longer walks to and from the bus stop, compared to 40% who prioritize a shorter walk over wait times at the bus stop.

Results varied by subarea. Respondents from the Oakland-Alameda-Berkeley subarea have the strongest preference (65%) for shorter wait times, while respondents from the Hayward-San Leandro subarea have the lowest (48%). Forty percent (40%) of respondents who have a disability would prioritize shorter wait times over a shorter walk to and from the bus stop.

Frequency versus Transfers

Overall, respondents are split 50-50 on their preference for frequent buses versus fewer transfers.

Results varied by subarea. Respondents from Hayward-San Leandro have the strongest preference (63%) for a frequent bus network, while respondents from the Oakland-Alameda-Berkeley have the lowest (49%).

Responses differ between respondents who answered online versus through paper surveys. (Paper survey responses were analyzed separately since this respondent group is more racially and socioeconomically diverse than the overall group of survey respondents.) Paper survey respondents have a stronger preference for frequency (59%) compared to the online survey respondents (49%).

Frequency versus Geographic Coverage

When asked which is preferred, 60% of respondents stated that resources should be used to maintain service on routes where many people ride rather than to cover spread out areas with low frequency service (40%). Compared to the other tradeoff questions, there was less variance by group or by location.

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

Of the survey respondents who left comments on what aspects of AC Transit service works well for them, 31% mentioned the network coverage – where routes go and having routes close to home, work, or school. The next three categories were tied at 14% - frequency of service, reliability (buses being on time), and convenience. The fifth most common category was connections to other modes, mentioned in 12% of comments.

The customer survey included two questions about what aspects of AC Transit service could be improved. When asked broadly about what aspects of AC Transit service could be improved, 39% mentioned reliability – buses being dependable, on-time, or canceling without notice. This was followed by the need for more frequent bus service (28%), the need for more coverage (15%), improving Transbay service (9%), and connections to other modes (8%).

When asked specifically about the single most important improvement AC Transit could make to improve their trip, the top five responses were more frequent bus service (27%), more reliable service (26%), more coverage (17%), connections to other modes (9%), and safety (8%).

These findings are consistent with industry-wide research that has found frequency of service to be the number one factor in attracting people to transit and on-time performance/service reliability the most important factor in retaining riders.