



Regional Transit Update

Presentation to Napa Valley Transportation Authority

May 17, 2023



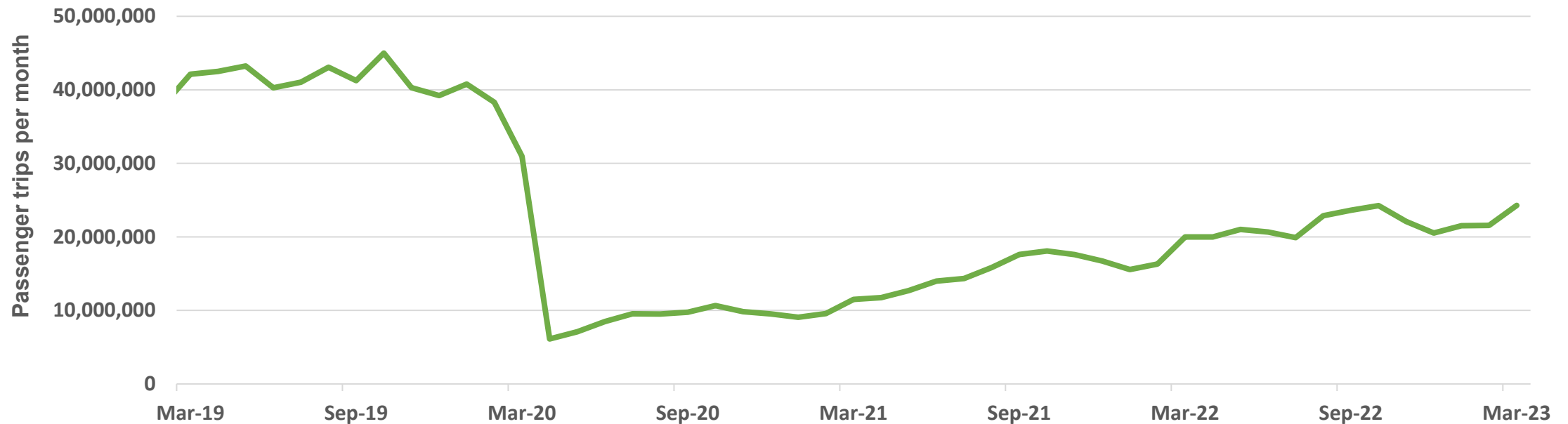
METROPOLITAN TRANSPORTATION COMMISSION



Transit Ridership – All Bay Area Operators

Transit ridership across the Bay Area remains at only 56% of pre-pandemic levels. But **an average of more than 22 million passenger trips were still taken on transit in Jan–March 2023.**

The drop is not explained **solely** by remote work: Of those who are **still commuting**, the share taking transit fell from 14% in 2019 to 5% in 2021 (2022 data not yet available). That gap is an opportunity.

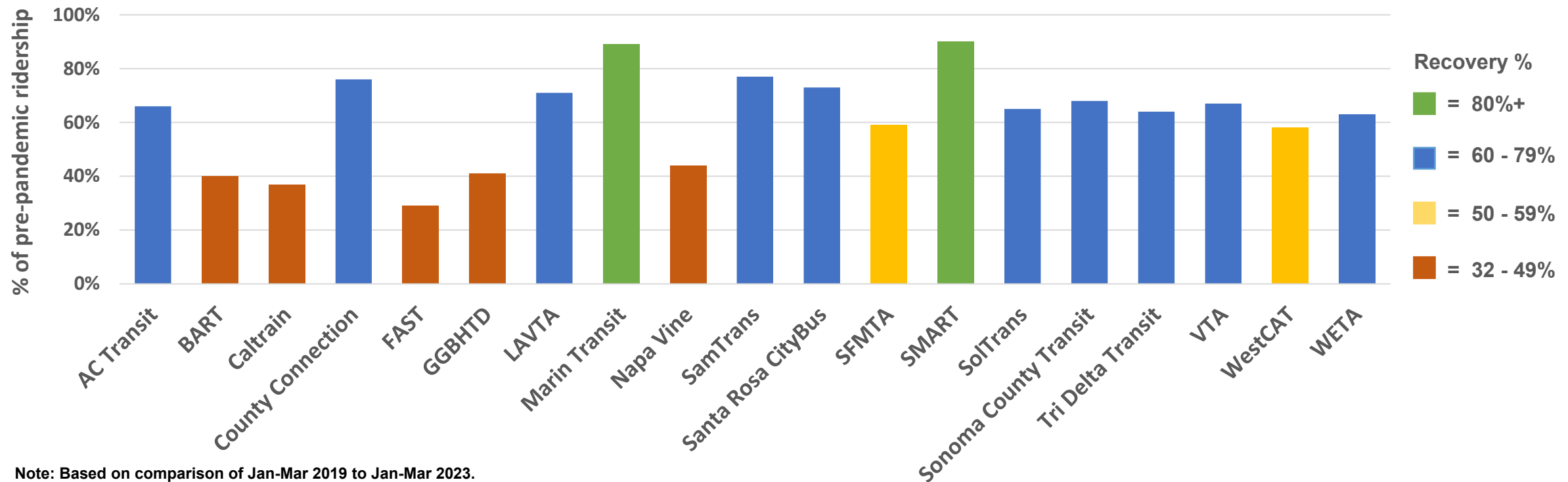


Source: National Transit Database

Ridership Recovery Varies Greatly by Operator



Ridership recovery by operator reflects the type of destinations served and the demographics of riders of each agency. Operators that serve the San Francisco commute have seen the greatest drop in ridership.



Note: Based on comparison of Jan-Mar 2019 to Jan-Mar 2023.
Data for Vacaville CityCoach and Union City Transit is not available.
Source: National Transit Database.



A Challenged Business Model



Population Loss

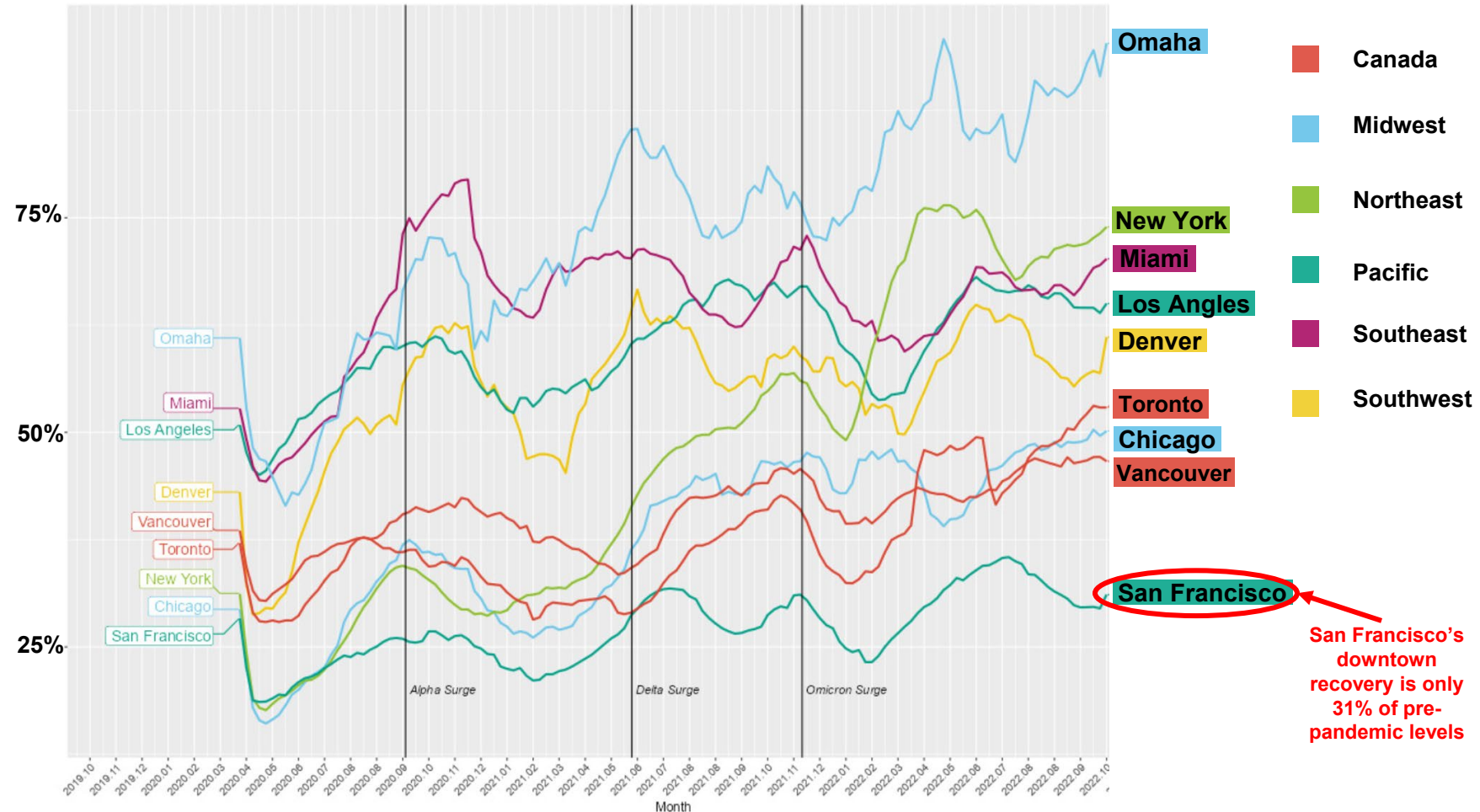
150,000 fewer people lived in the Bay Area 2022 than in 2015*



Workplace Changes

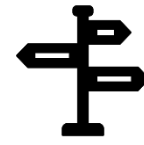
Downtown SF and Oakland have the *lowest* rate of office in-person occupancy in North America*.

UC Berkeley Downtown Recovery Quotient Trajectories in 9 Select North American Cities*



*Sources: UC Berkeley/U of Toronto - [Downtown Recovery Study](#); [CA Dept. of Finance](#)

Key Short Range Transit Plan Themes



Fiscal and operating challenges vary dramatically across operators

1. Farebox dependent operators remain acutely vulnerable to sluggish ridership recovery
2. 100% of pre-pandemic revenues would not be sufficient to restore 100% of pre-pandemic service
3. Fiscal cliff is not the only challenge. For some agencies, operator recruitment and retention are as significant a challenge, if not more so, than fiscal ones when it comes to restoring transit service to levels operated pre-pandemic

All operator submitted Reimagined SRTP data is posted at www.mtc.ca.gov/srtp

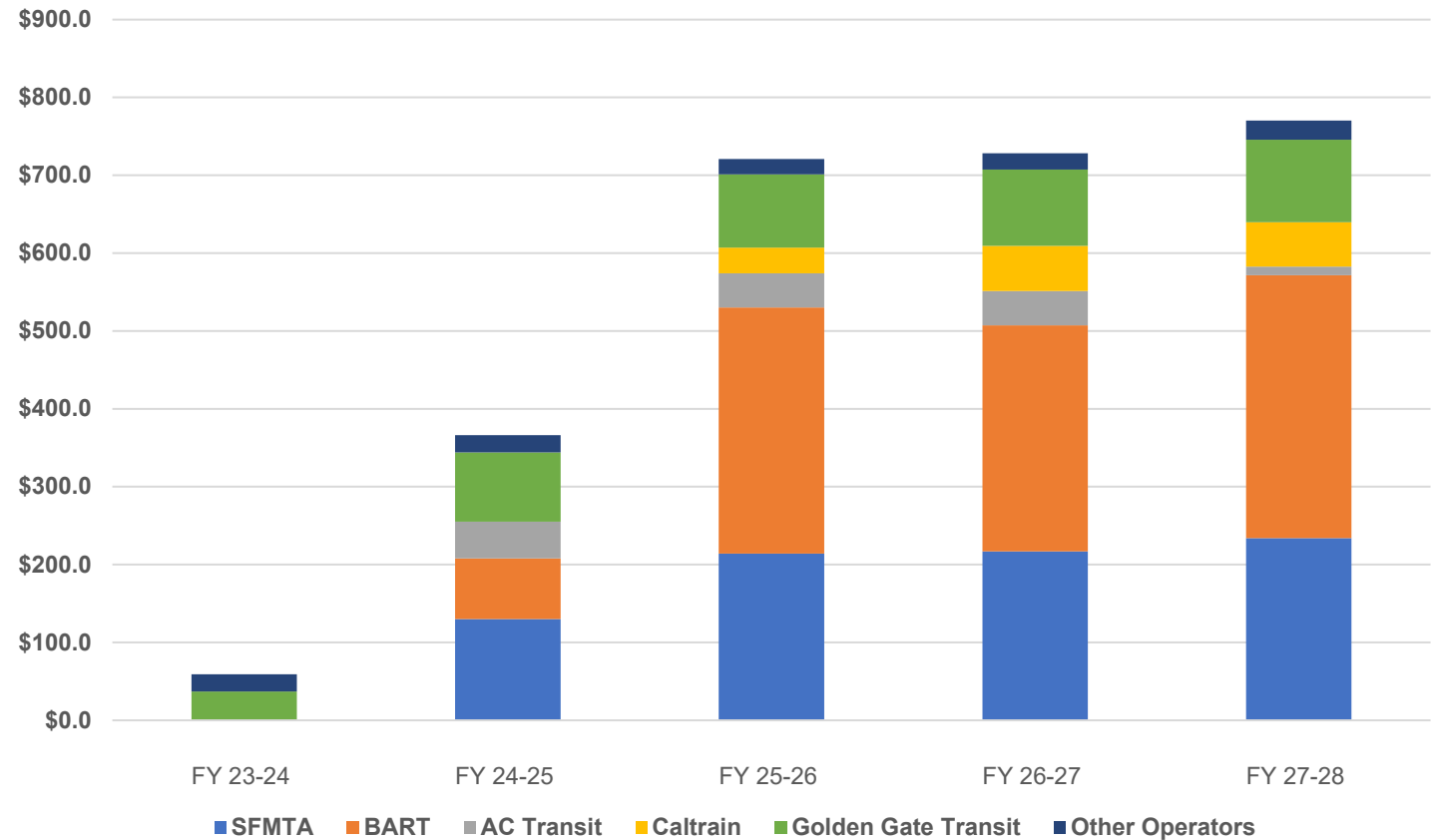


Photo: Karl Nielsen

Bay Area Public Transit Needs Support to “Survive and Thrive”

Bay Area transit operators report a cumulative operating shortfall of approximately \$2.5 billion over next five years

- As COVID-19 Relief funds dwindle, transit agencies need replacement funding to sustain operations
- Funding is also needed for improvements that improve the customer experience and increase ridership.

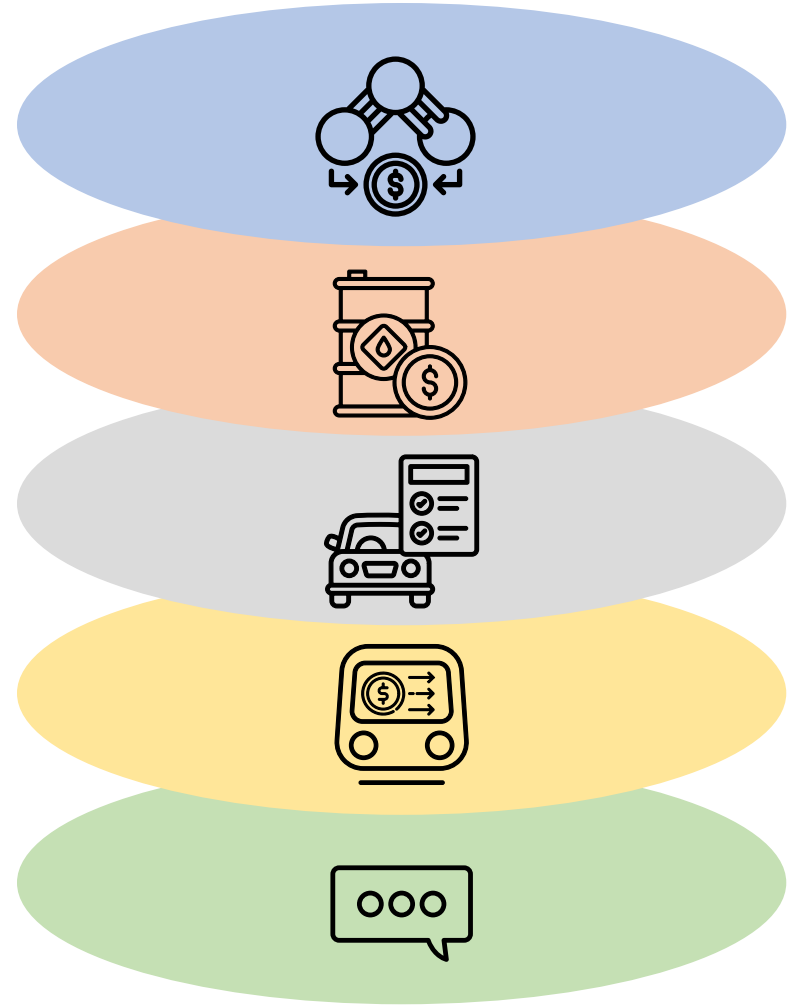


The Case for State Assistance: Transit is a Key Part of California's Transportation System

- While public transit is operated locally, for decades California has recognized that a well-functioning and connected transit system is a core state interest.
- For the last 20 years, the state has invested \$6.5 billion in Bay Area transit expansion. To reap the benefits (climate & otherwise) of these investments, reliable service is essential, but the state's investment in transit *operations* has remained low by comparison to east coast states with robust transit systems like Chicago, PA and NY.
- Congress provided \$4.4 billion to the Bay Area to assist with transit operations while the state has provided no operating funding to address pandemic related impacts.
- Transit is foundational to the state's **climate** and **equity** goals.
 - Transit riders are disproportionately low-income, people of color, and renters. Transit riders are almost 5X more likely not to own a car than the general Bay Area population.

Key Concepts Guiding the State Ask

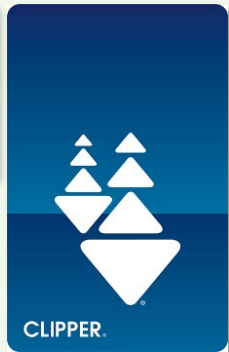
- Seek **new funding for transit operations** by primarily shifting existing sources that minimize impact on the state's General Fund.
- Demonstrate that transit has “**skin in the game**” by staying neutral on flex options from transit capital funds to operating.
- Prioritize “Survive” funding and seek “Thrive” investment in **rider-focused transit enhancements**.
- Provide a **menu of options** to give Legislature more flexibility to weigh pros and cons and select preferred approach.
- Offer recommendations for how state can encourage improvements to **transit service**.



Transit Transformation Action Plan – Desired Outcomes

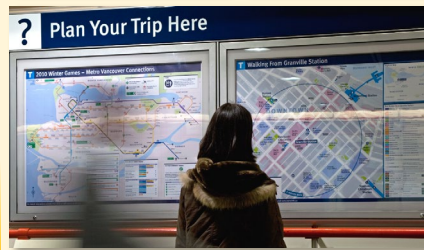
I. Fares and Payment

Simpler, consistent, and equitable fare and payment options.



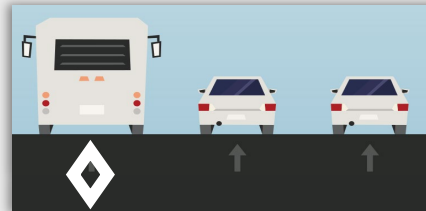
II. Customer Information

Make transit easier to navigate and more convenient.



III. Transit Network

Transit services managed as a unified, efficient, and reliable network.



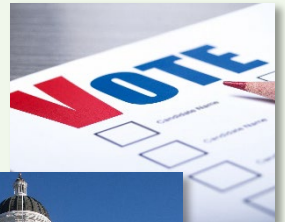
IV. Accessibility

Transit services for older adults, people with disabilities, and those with lower incomes are coordinated efficiently.



V. Funding

Use existing resources more efficiently and secure new, dedicated revenue to meet funding needs.



Updates on Actions

Outcomes

I. Fare Coordination and Integration



Key Actions

BayPass Pilot

- University Students and Affordable Housing Residents (2022)
- Pilot with Employers, Transportation Management Associations and Property Managers (2023)

No-Cost and Reduced Cost Inter-Agency Transfer Pilot:

- Program Design (2023)
- Deploy with Clipper Next Generation (2024)

II. Mapping and Wayfinding

Better information
for travelers



Better ways of working
for providers



Better outcomes
for the region



System Design and Prototyping

- Applied Wayfinding Inc. contract awarded (July 2022)
- System design standard development (Winter 2022/23)

Mapping Services Platform

- Interline Technologies, LLC contract awarded (January 2023)
- Design underway (2023-2024)

Subregional Pilots (2024)

The Clipper Start Pilot

3-year pilot on regional means-based per-ride transit fare discount

- Eligibility = Age 19-64, < 200% of Federal Poverty Level for household income
- **Goals:**
 - Make transit **more affordable** to individuals earning low-income
 - Develop implementation options that are **financially viable and administratively feasible**
 - Move towards a more **consistent regional standard** for fare discounts

20% DISCOUNT (14)



50% DISCOUNT (7)





Unlimited* regional transit pass for rides on all bus, rail and ferry services in the Bay Area – anytime, anywhere



*Excludes Muni Cable Cars

Phase 1

Pilot with University Students and Affordable Housing Residents

Launched 2022

Phase 2

Pilot with Employers, Transportation Management Associations and Property Managers

Launching 2023

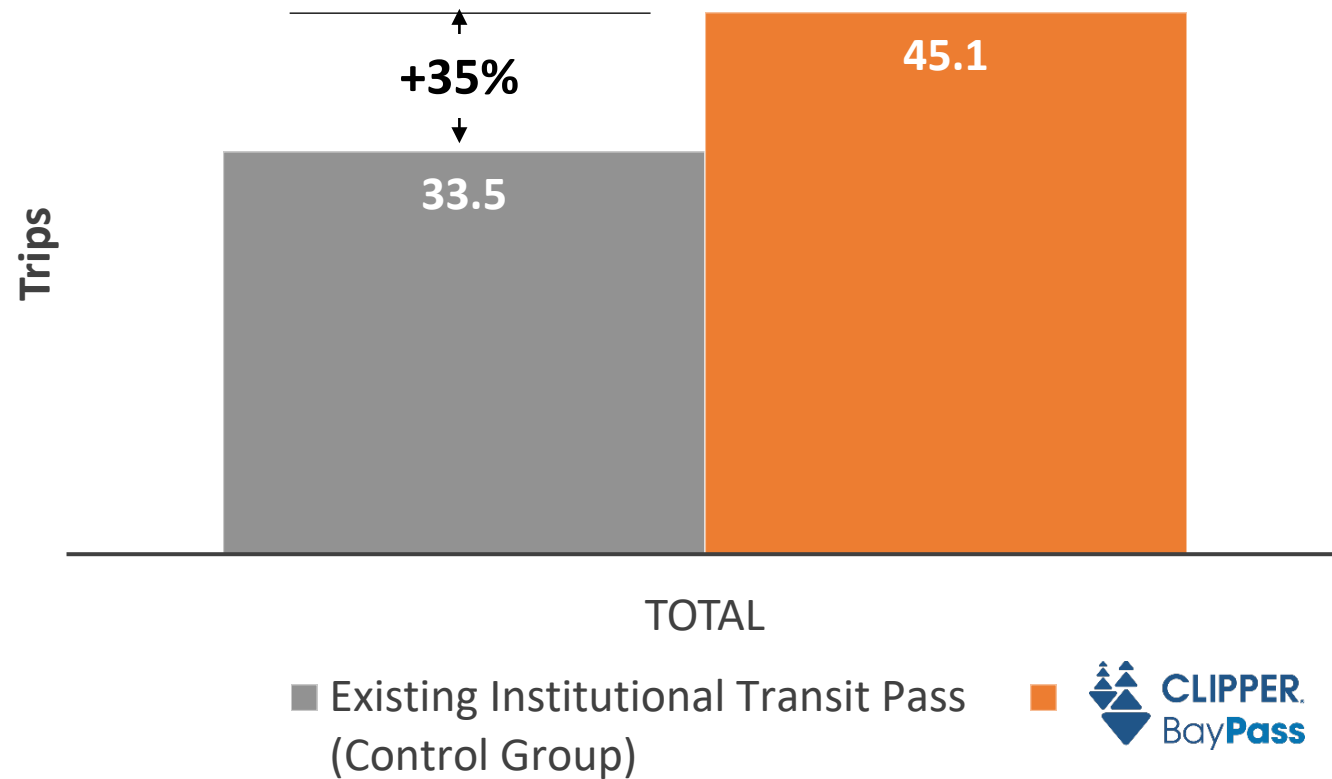
More information: www.ClipperBayPass.com



Promising Early Results from Clipper BayPass

+35%
Number of trips
Clipper BayPass pilot
participants have
taken relative to
control group
(with single agency
passes)

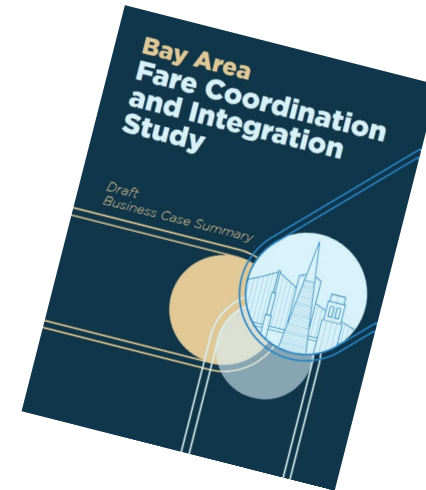
Average Trips Per Card



Based on preliminary data gathered between August 19, 2022 and April 7, 2023, excluding December 16, 2022 to January 30 2023. Draft

No-Cost & Reduced Cost Interagency Transfer Policy Pilot

- Launching in 2024, concurrent with launch of Next Generation Clipper system
- 18-month pilot, fully funded with \$22 million from MTC
- Expected to grow ridership by over 25,000 daily trips – extremely cost effective relative to transit capital expansion projects
- Endorsed by Fare Integration Task Force in March 2023, action by individual transit governing boards needed later this year for pilot to launch



“When you make a trip that requires transferring between transit agencies, pay the full fare on just the first agency you use.

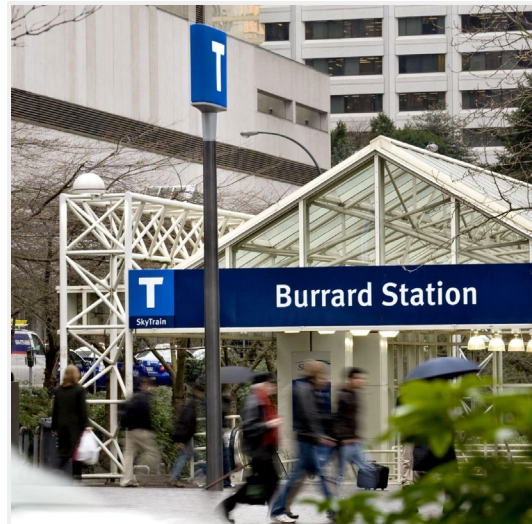
Any transfer to another agency within two hours of the first boarding is discounted up to a limit of \$2.50* per transfer”.

Example Trips
Under “No-cost /
Reduced Cost
Transfers” Policy

Example Trip 1 Excelsior District, SF to San Bruno		Example Trip 2 Alum Rock, SJ to Redwood City		Example Trip 12 th St., Oakland to Santa Clara	
Local Agency #1	Local Agency #2	Local Agency #1	Regional Agency #2	Regional Agency #1	Regional Agency #2
					
Fare = \$2.50	Fare = \$0	Fare = \$2.50	3 Zones Fare = \$7.70 - \$2.50	Fare = \$5.50	3 Zones Fare = \$7.70 - \$2.50
Total Fare = \$2.50		Total Fare = \$7.70		Total Fare = \$10.70	
Customer savings = \$2.05		Customer savings = \$2.50		Customer savings = \$2.50	

*When making an inter-agency transfer, customers using Clipper receive a discount equivalent to the single-ride Clipper fare for amounts up to the region’s highest local transit fare (currently \$2.50). This amount may change based on local agency fare adjustments.

Regional Mapping & Wayfinding Project Scope



Identity



Directional



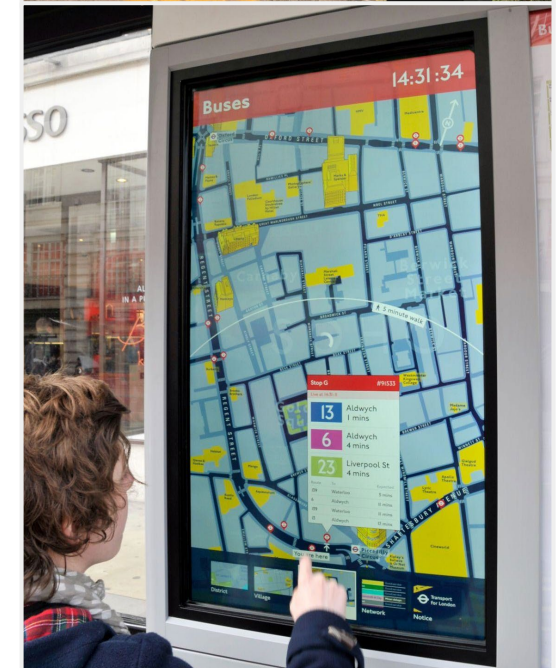
Accessibility



Maps

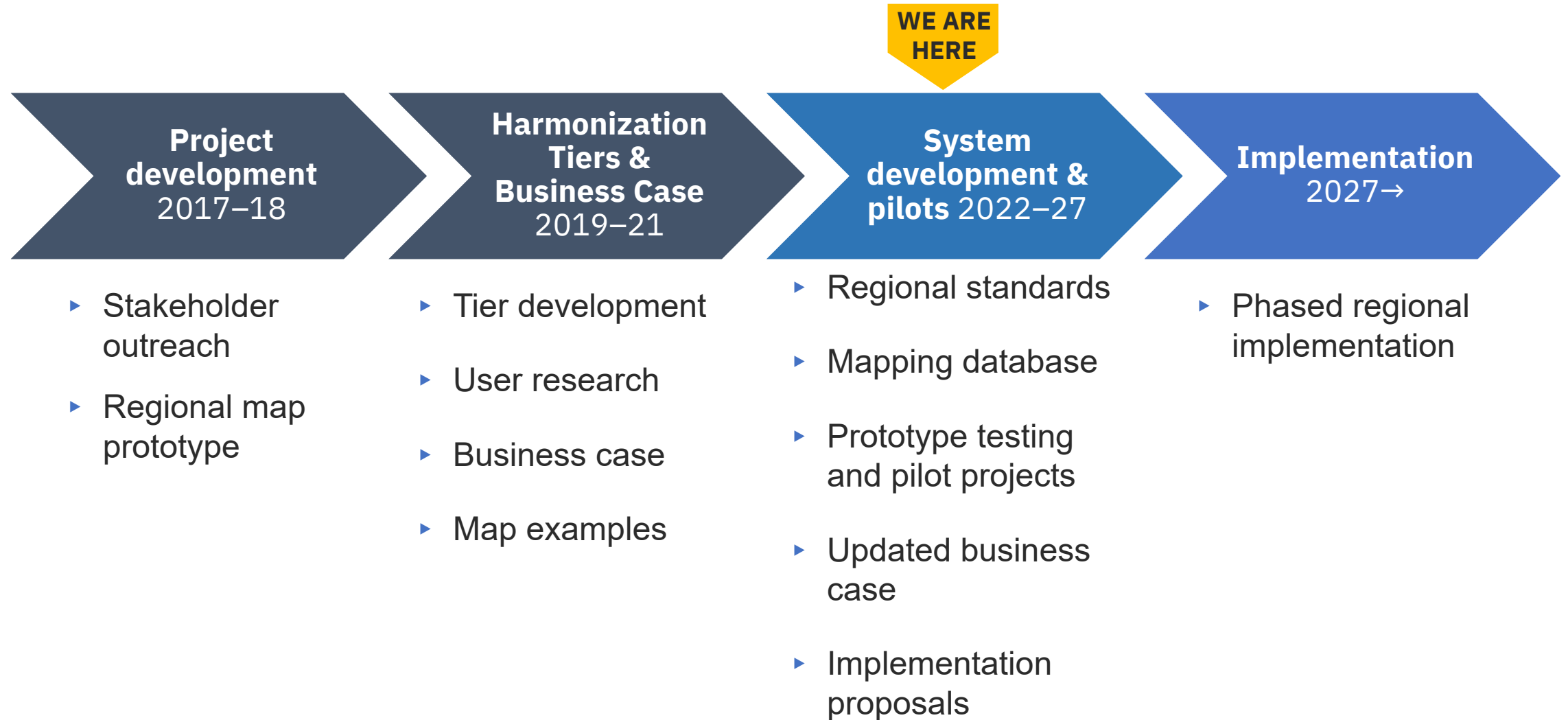


Information & schedules



Digital

Mapping & Wayfinding Phasing



Updates on Actions

Outcomes

Key Actions

III. Transit Network



Bus Transit Priority

- Design on I-80 transit improvements projects for the Bay Bridge Corridor; Construction (2024-2025)
- Transit Priority call for projects/ project selection (2023)
- Policy and assessment development underway (2023)

Regional Network Management

- Implement recommendations (2023)

Transit 2050+

- Consultant procurement underway (Final in 2025)

Realtime Data

- Regional Standards (2022), seek funding for bringing up to standards (2023)

Focus on Regional Network Management

RNM Mission:

To drive transformative improvements in the customer experience for regional Bay Area transit

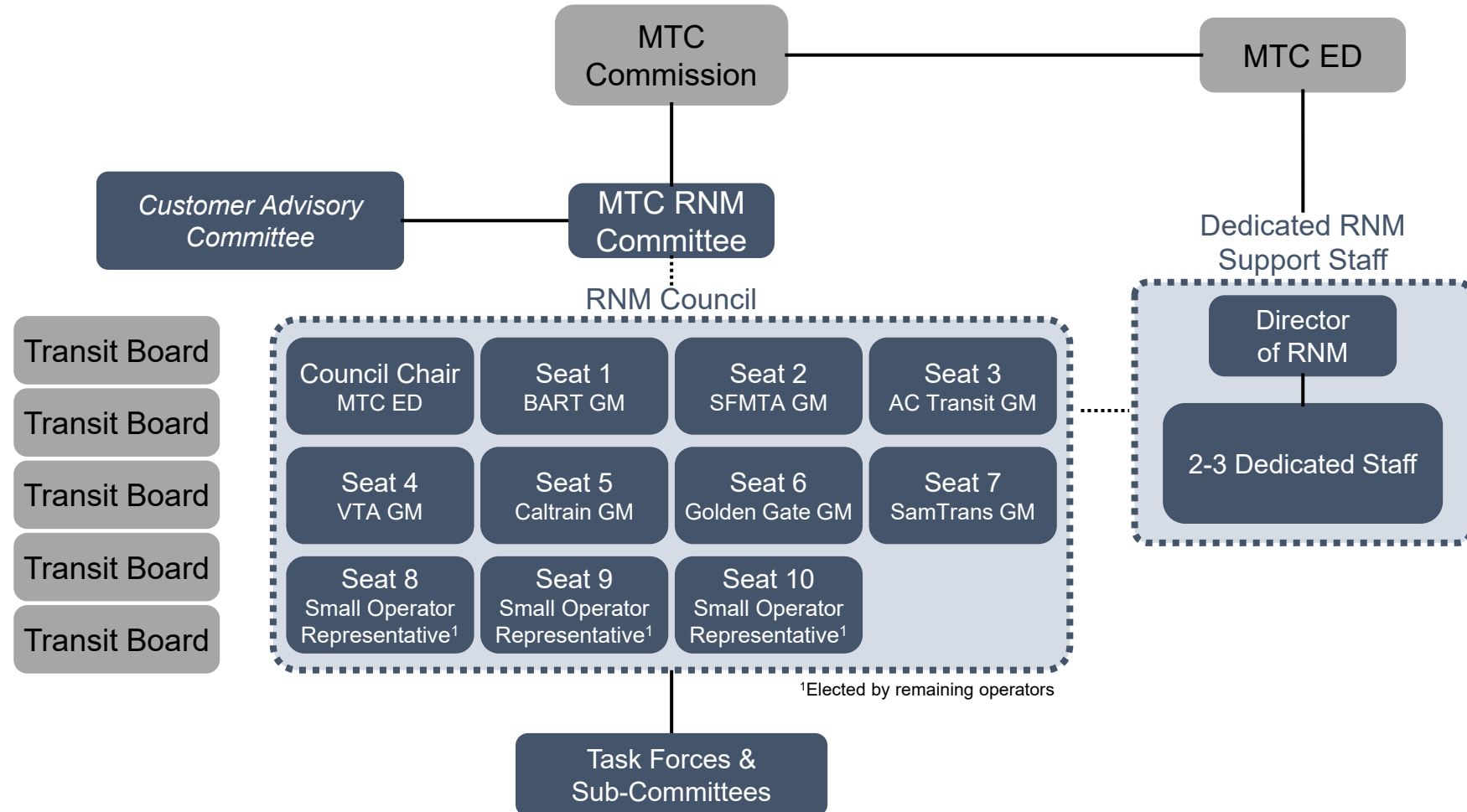
RNM Vision:

To advance regional goals in equity, livability, climate, and resiliency through a unified regional transit system that serves all Bay Area populations

RNM Objectives:

- Deliver Customer Benefits (e.g., enhanced experience, improved safety, increased accessibility, reduced travel times)
- Deliver Network Management Benefits (e.g., improved planning, economies of scale, increased ridership, improved decision making)
- Deliver Other Public Benefits (e.g., reduced VMT, economic growth, enhanced connectivity, increased equity)

RNM Organizational Structure:



Updates on Actions

Outcomes

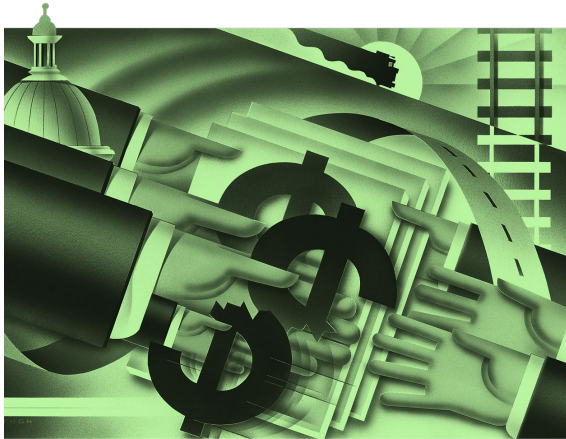
Key Actions

IV. Accessibility



- Coordinated Plan and Paratransit Eligibility Standard Practices Assessment (Late 2023)
- Trapeze awarded contract to design Third Party software Integration for paratransit fare payment with the Next Generation Clipper (C2) System (March 2023)

V. Funding



- Initiated discussions and Listening Session related to future regional measure (December 2021)
- Stakeholder engagement to inform enabling legislation in 2024 (Fall 2022 – December 2023)
- Transit Agency Fiscal Cliff – Staff and Operator coordination on state budget request (2023)

The Path to a Financially Sustainable Business Model

