

# Transit Operator Perspectives

MTC Commission

October 25, 2023



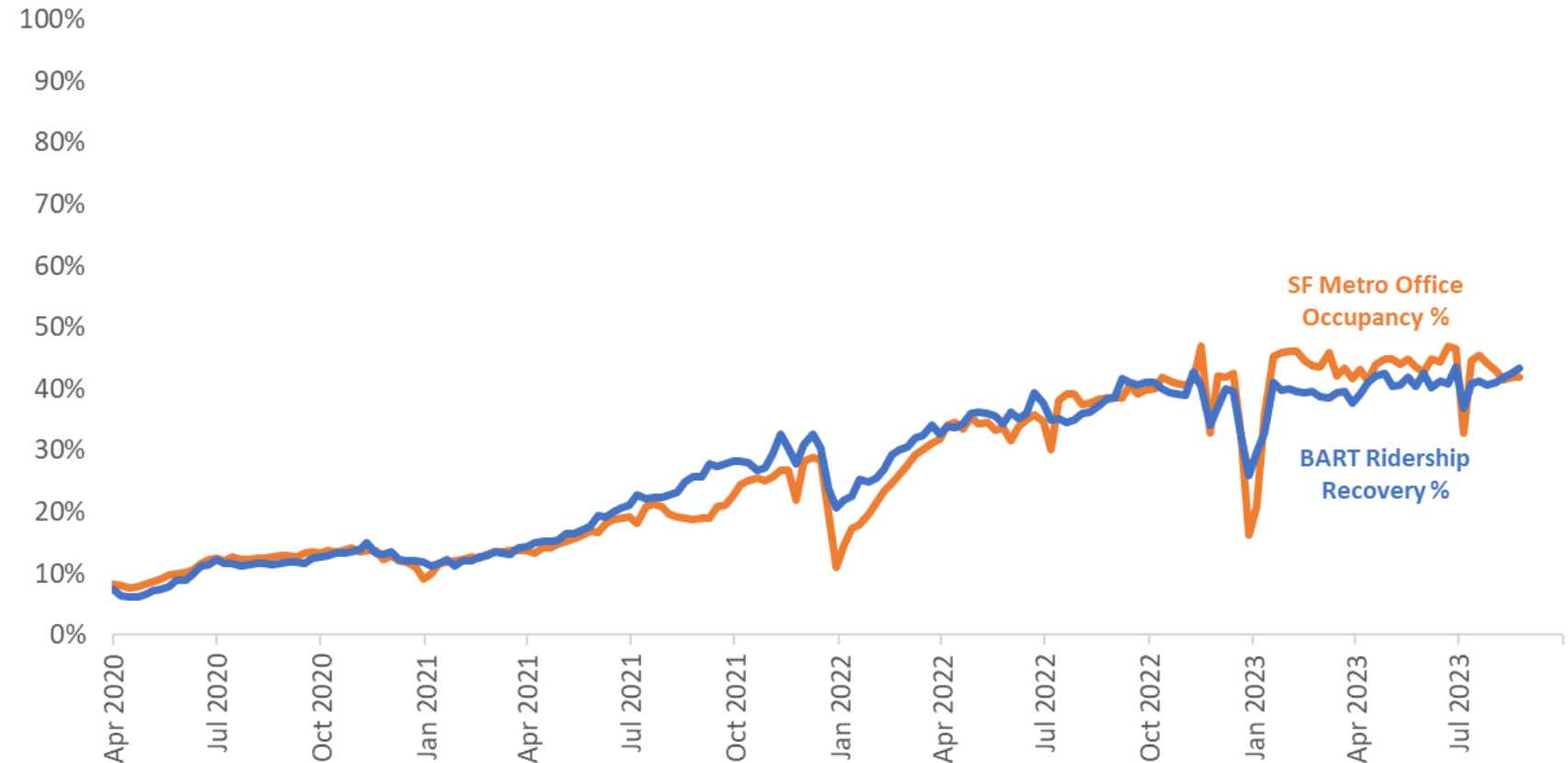
# Post-Pandemic Travel Trends

BART ridership aligns closely with downtown San Francisco office occupancy

Midday, evening, and weekend ridership recovering more than commutes

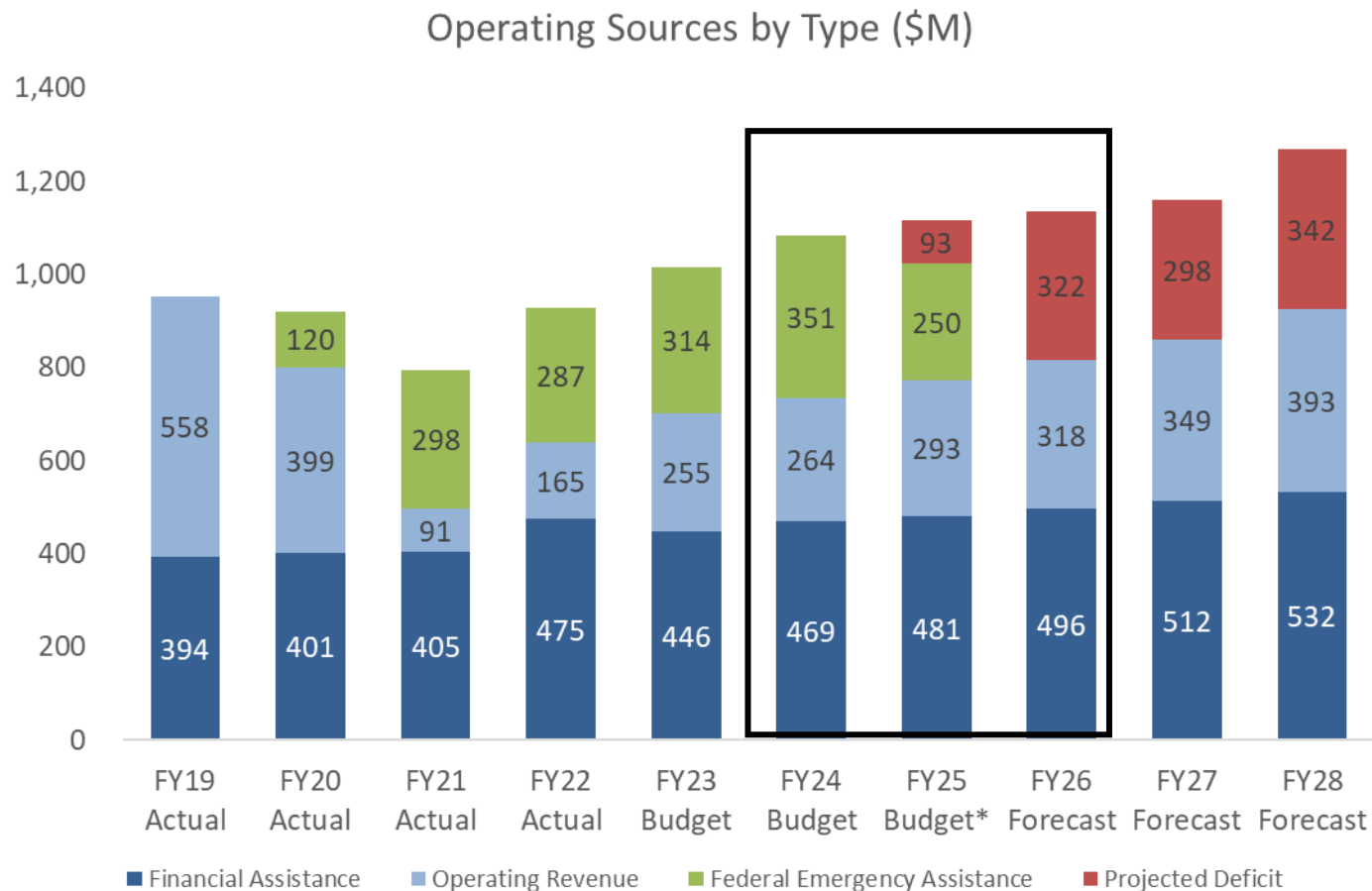
Stations serving low-income/minority riders are most utilized

## BART Ridership and SF Metro Area Office Occupancy



# BART

## Financial Status



\* Federal emergency assistance fully expended in FY25

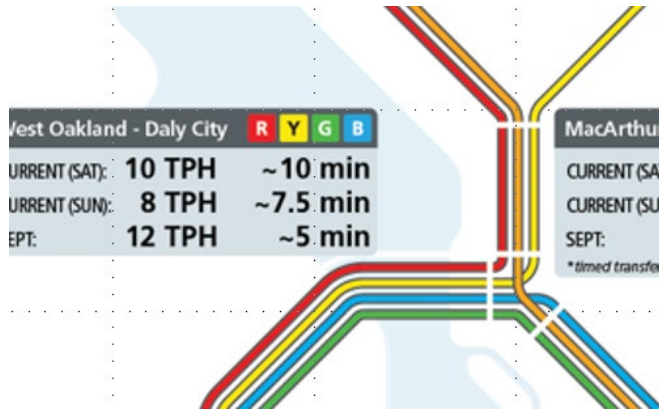
Pre-pandemic, BART was highly self sufficient:

- 60-70% farebox recovery
- Operating allocations to critical capital reinvestment projects

Post-pandemic, \$1.6B federal emergency assistance filling fare revenue gap through early 2025; \$300M structural deficit thereafter

Seeking SB 125 support to close gap through FY26

# Improving the Customer Experience and Growing Ridership



## Improving rider safety & security

- APTA-award winning Progressive Policing
- March 2023 – increased police presence by more than doubling sworn officers on trains in SF/core service area
- Ambassadors, Crisis Intervention Specialists, Fare Inspectors connect people in crisis with support services



## Service Improvements

- Restoring service and adjusting to match demand
- Increasing weekend and evening service
- Shortening least crowded trains; \$9M annual cost savings
- All new cars systemwide
- Train delays down, passenger on time up



## Prioritizing Cleaning

- Doubling the rate of deep cleaning on train cars
- Adding nearly 66% more dedicated crews working to keep stations clean.
- Elevator attendants in DT SF
- Restroom attendants in high traffic stations

# Improving the Customer Experience and Growing Ridership



## Regional coordination

- Clipper BayPass – regional transit trips up 35%
- BART leads the way for all operators at 50% Clipper START discount
- Weekly GM meetings on rider experience & funding



## New fare gates

- Taller, stronger fare gates to deter and detect fare evasion
- Improve accessibility, maintenance & reliability
- Contract awarded April 2023
- First station in 2023, system complete in 2025



## Reinvesting in the system

- Modernizing BART assets to improve reliability
- \$3.5B Measure RR funds leverages more than \$3.5B of other funds
- New infrastructure rolling out systemwide – cars, rail, escalators, elevators, and more





# SFMTA Focus:

## Fast, Frequent, Reliable, Safe, Clean



Improved speed, reliability



Responding to travel patterns



Reduced major delays



New customer information system



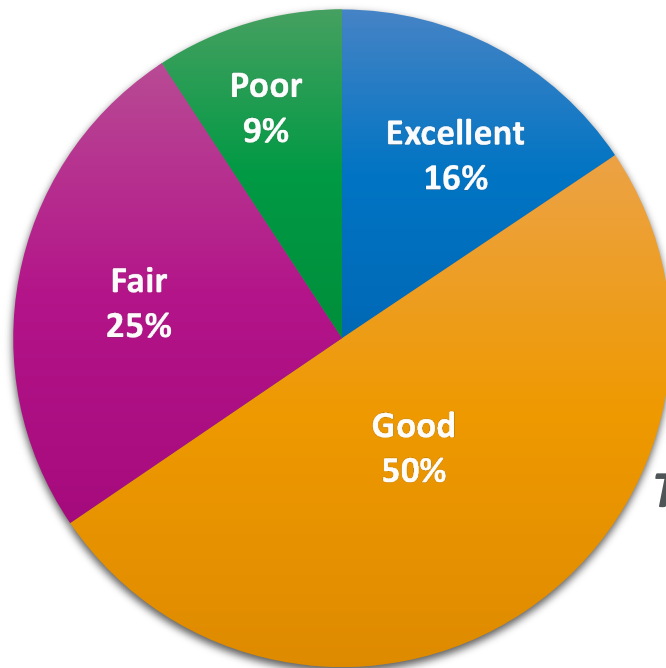
Cleaner vehicles, stations, transit shelters



More security personnel

# Riders are noticing through recent Muni perception surveys.

*Overall, how would you rate Muni's service?*



Source: 2023 SFMTA Ridership Survey

***66% of Muni riders rate service as good or excellent, +9% from 2021***

— 2023 SFMTA Ridership Survey

***Muni at highest rating since 2013***

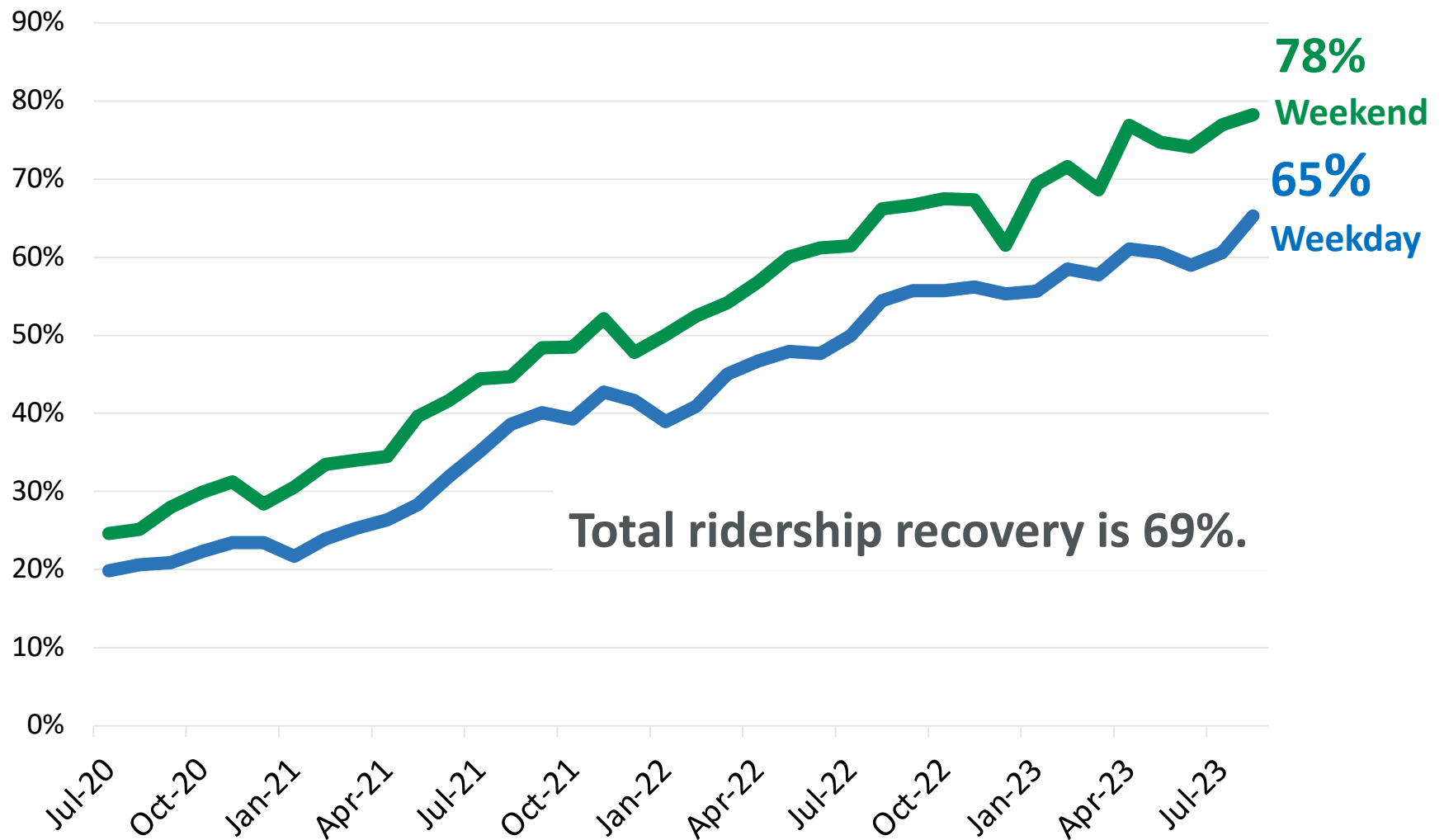
— The City Survey, 2023

***Top 5 North American cities for riders most likely to recommend their public transit system to a friend***

— Transit App's North America Transit Rider Happiness Benchmarking Survey



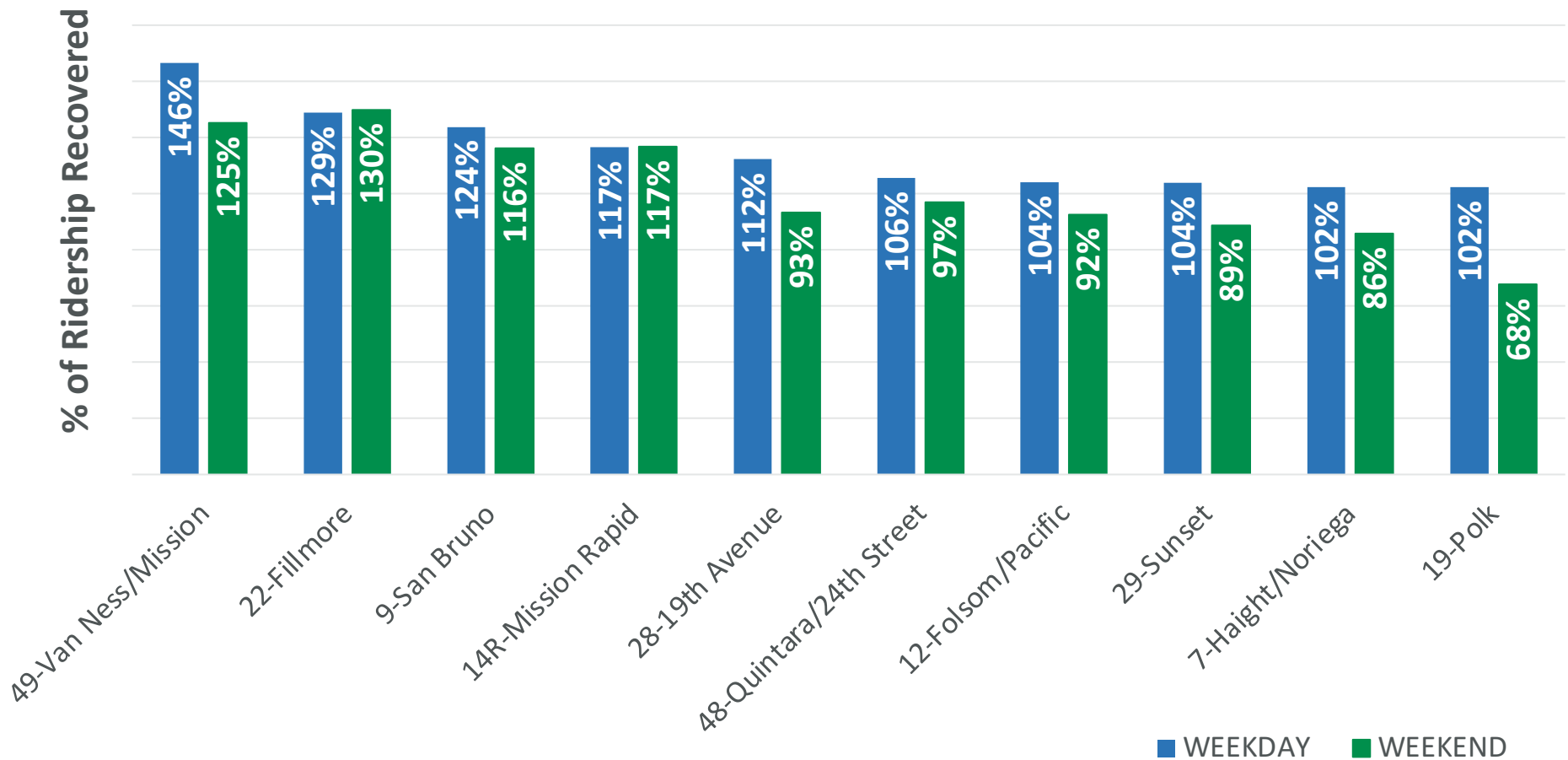
# Ridership continues to climb, with September the highest in 4-years.



# Highest Ridership Recovery Routes

August 2019 vs August 2023

*Lines connecting neighborhoods are seeing highest ridership recovery, particularly off-peak*



# 5-Year Financial Outlook

*State relief buys us time, as deficits remain, but a permanent solution is needed to avoid service cuts.*

	FY23-24		FY24-25		FY25-26		FY26-27		FY27-28	
Revenue	\$	1,420	\$	1,364	\$	1,296	\$	1,327	\$	1,358
Expenditure	\$	1,420	\$	1,465	\$	1,517	\$	1,571	\$	1,627
Surplus/(Deficit)	\$	-	\$	(101)	\$	(221)	\$	(244)	\$	(269)
MTC Staff Proposed Relief	\$	-	\$	99	\$	209	\$	-	\$	-
<b>Remaining Deficit</b>	<b>\$</b>	<b>-</b>	<b>\$</b>	<b>(2)</b>	<b>\$</b>	<b>(12)</b>	<b>\$</b>	<b>(244)</b>	<b>\$</b>	<b>(269)</b>

*In millions, figures are SFMTA wide*