

Transit Agency Recovery Update

MTC Workshop

October 27, 2021

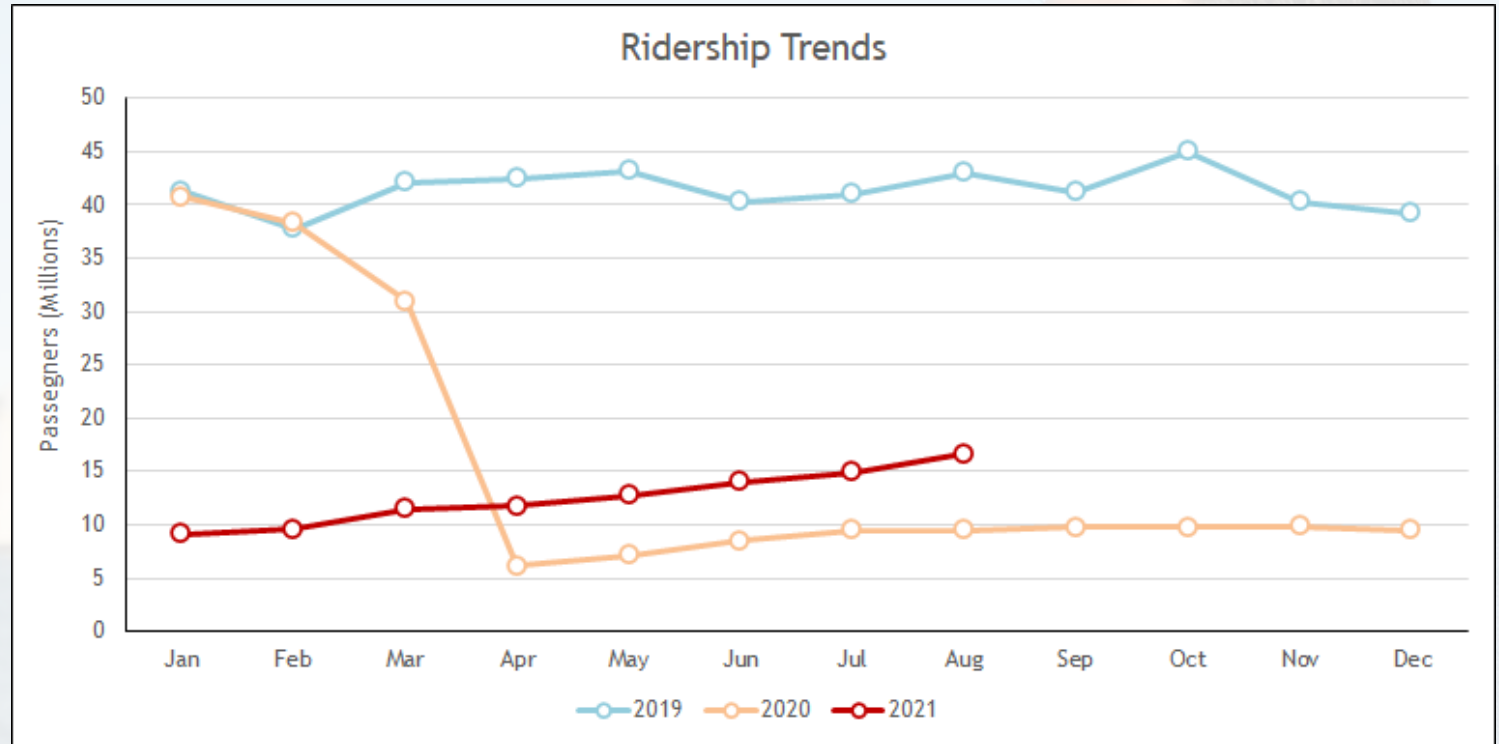


Bay Area Transit Ridership

Ridership in the Bay Areas is slowly increasing but remains significantly below pre-COVID levels.

- Current recovery led by transit dependent riders
- Office commute lagging; uncertain recovery timeframe

Bay Area Transit Ridership (all operators)



Source: NTD Data

Ridership & Service –Status

Ridership trends vary by service type illustrating shifts in transit demand. Commute and regional services experience greater ridership losses as compared to local services more likely to serve essential workers.

Caltrain

Ridership: -87%

Increased weekday and weekend service

BART

Ridership: -78%

Returned to near pre-COVID weekday service

SMART/WETA

Ridership: -62%

WETA returned to near pre-COVID service; SMART operating reduced levels

Golden Gate

Ridership: -72%

2/3 of routes suspended and others modified

VTA

Ridership: -63%

Light rail service restored in late August

SFMTA

Ridership: -57%

Increased weekday and weekend service

AC Transit

Ridership: -55%

Select Transbay service restored

Small Ops

Bus Ridership: -54%

Service levels vary

SamTrans

Ridership: -47%

Operating modified schedule, similar to pre-COVID

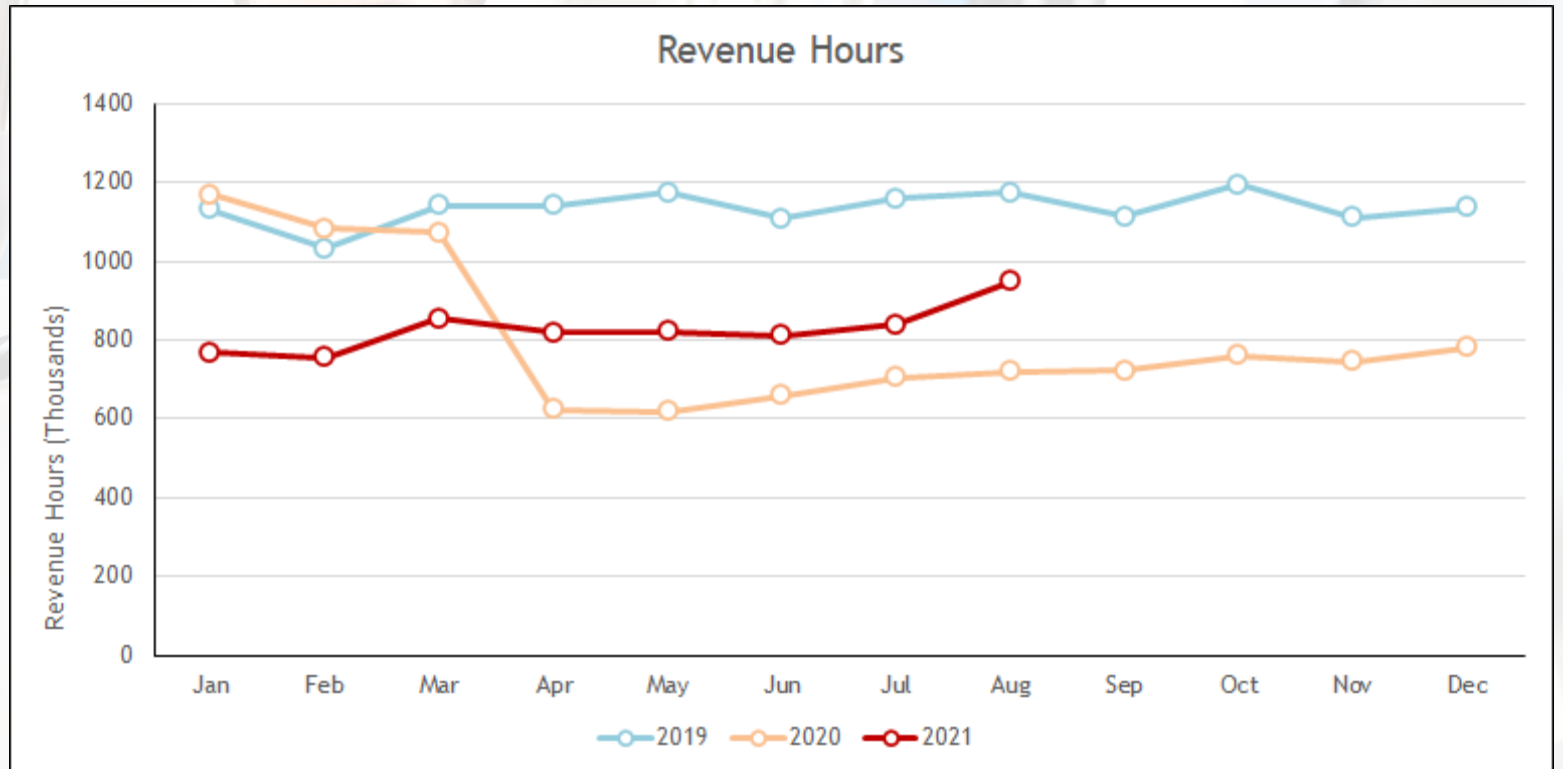
Combined annual revenue loss due to decreased ridership >\$700M

Service Levels – All Operators

Stimulus funds have been critical in allowing operators to maintain some level of service despite significant revenue losses from traditional sources.

Most revenue service today supports transit dependent riders and essential services.

Bay Area Service Levels (all operators)



Source: NTD Data

Regional Transit Context



Service Restoration & Return to Transit

- Service levels must be ready to welcome riders back
- Transit restoration/enhancements
 - Service hours restored to ~75%
 - Payment enhancements, transit priority improvements
 - Clipper START expansion and extension
 - Equity-based service restoration for transit dependent demand
 - School service at near pre-COVID levels
- Return to Transit Campaign – Fare Promotions
 - Reduced fares expanded
 - Limited-period free fares
 - Additional promotions upcoming
- Capacity restrictions lifted, masks required, and enhanced cleaning continues

Near-Term Challenges

- Allocation of stimulus funds extend viability of transit through recovery
 - Agencies must operate and develop budgets in context of uncertainty
 - Long-term transit viability beyond current stimulus packages remains uncertain
- Return to workplace postponement
 - Current forecast is that the new "normal" will be delayed until mid-2022
 - Continue to expect a significant decrease in office commute riders
- Shifting rider demand requires new planning approaches

Status of Resources

- Operator shortage
 - Regional shortage currently exceeds 300 operators
 - Current and future service levels dependent on operator availability
 - Exacerbated as service returns to pre-pandemic levels, in some cases prevents service restoration
- Vaccine mandates
 - Mandate enforcement will further impact labor availability (hiring, training and retaining)
- Increasing labor & capital costs
- Supply chain impacts
 - Parts, vehicles, equipment



Ongoing Coordination


- Regular weekly coordination by operators on multiple facets
 - General Manager Coordination
 - Operations Planning
 - Financial Sustainability
 - Communications and Outreach
- Sharing of best practices including:
 - Service planning strategies
 - Best practices for data collection and sharing
- Coordination on developing common service categories and coordinating sign-up dates
- Development of transit hub design guidelines and prioritization for improvements

Transformation Action Plan

Regional partnership to improve transit experience and attract new riders

- Transit Operators are **ready partners** in Action Plan implementation
- Focus on **immediate, customer-centered results** to retain existing riders and attract new riders
 - **Bus transit priority** - critical to improve speed and reliability – factors riders consistently cite as important to make transit attractive
 - **Fares** - improving customer experience, equitable outcomes, and support interagency travel can start with fare study pilots
 - **Mapping and wayfinding** - make transit easier to navigate by acting on long-standing MTC/Operator partnership
- Other actions critical to **set the stage for transformation:**
 - Define the regional network & develop a Connected Network Plan
 - Improve data collection and coordination
 - Identification of paratransit challenges and recommended reforms, including the integration into Clipper 2

Discussion

A photograph of a San Francisco Muni bus, number 839, in the foreground. The bus is white with green and yellow stripes. In the background, the Golden Gate Bridge spans the water, with its iconic red-orange towers and suspension cables. The scene is set against a clear blue sky and a body of water. A black chain-link fence is visible in the lower right corner.