

**To:** Board of Directors

**Date:** 8/6/2019

**From:** Sean Hedgpeth – Manager of Planning

**Reviewed by:** WC.

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**SUBJECT: Spring 2019 Service and Fare Restructure Update (March-May)**

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### **Background:**

On March 10<sup>th</sup>, County Connection implemented a large service restructure which modified most of the routes in the system. This service change also coincided with a fare change, which eliminated paper products such as transfers and punch cards, eliminated the 10am-2pm midday free program for seniors and the disabled (with the exception of the Bridge and RES Success programs), and increased the base cash fare while keeping Clipper fares unchanged.

The primary goals of the service restructure are to increase ridership, increase productivity, simplify fares, and to reduce costs. The service change added service on more productive routes and eliminated less productive service. Several route alignments were modified to match area demand and to create faster travel times. The original ridership estimated impact from last Fall in 2018 projected a drop of 10%, with use of Clipper doubling throughout the system.

### **Systemwide Performance**

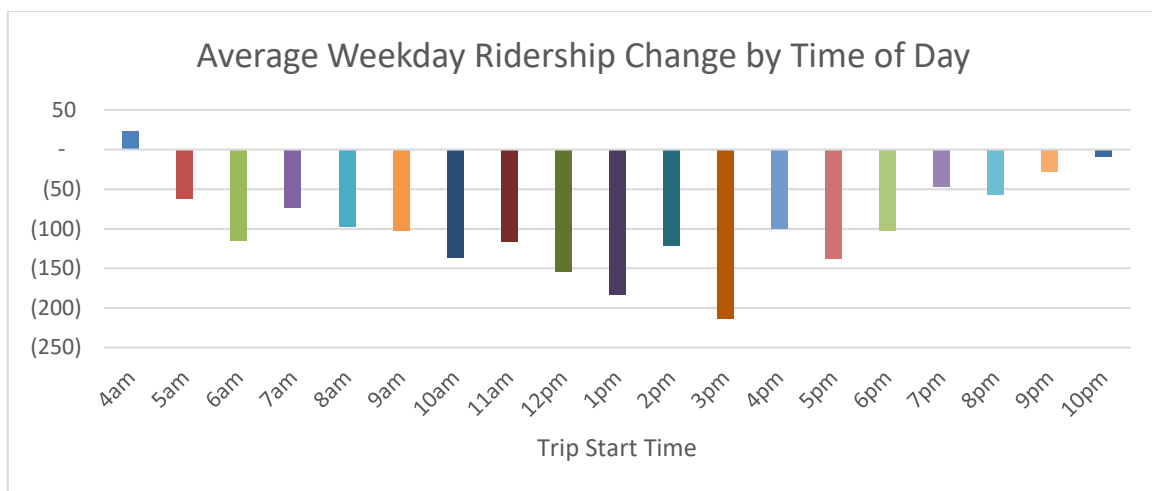
Average weekday ridership was down 9% compared to March-May 2018. As with most change, people need time to adapt to new schedules and fare payment options. While some connections may have been lost from the old route network, new connections take time for marketing to get the word out, for students starting a new school, or employees starting a new job. Staff has been processing more applications for senior and youth Clipper cards, which save a lot of money for riders. Once more time has passed, the new trips should start to find more regulars and holdouts will finally get Clipper, which should increase ridership, which was a major goal of the restructure. Already the simplified fare structure is paying off, with drivers spending less time with punch cards or providing paper transfers. Paper transfers and the 10am-2pm Midday Free program were prone to abuse, which in some ways inflated our ridership. Moving forward, our ridership will be indexed better to paying customers and farebox revenue.

## Operational Impacts

The March 2019 restructure created some operational efficiencies, such as reducing the number of operators required for full service. During the Winter 2018 bid, a total of 143 operators were needed fulfill our service requirements. In Spring 2019, only 136 operators were needed in peak service. This reduces the pressure on driver recruitment, which is a national problem. If these cuts were not made, County Connection surely would have missed many more trips due to operator shortages. In addition to reducing the number of operators required for service, scheduled overtime was nearly cut in half, with 61 weekly hours required in Spring 2018 compared to 38 weekly overtime hours required in Spring 2019. This has a direct impact on the agency's financial goal to reduce costs.

## Ridership Changes by Time of Day

As part of the fare restructure, the 10am-2pm Midday free program was eliminated. There were several accounts from bus operators of abuse, including refusing to provide ID for proof of age or disability and abusing the paper transfer. This often allowed riders to use the two-hour transfer to extend the free period until 4pm. The chart below reflects that midday riders may have shifted their trips, or otherwise elected to not take the bus altogether. The only hour that is up is the 4am hour, due to BART EBX 700s.



## Ridership Changes by Major Bus Stop

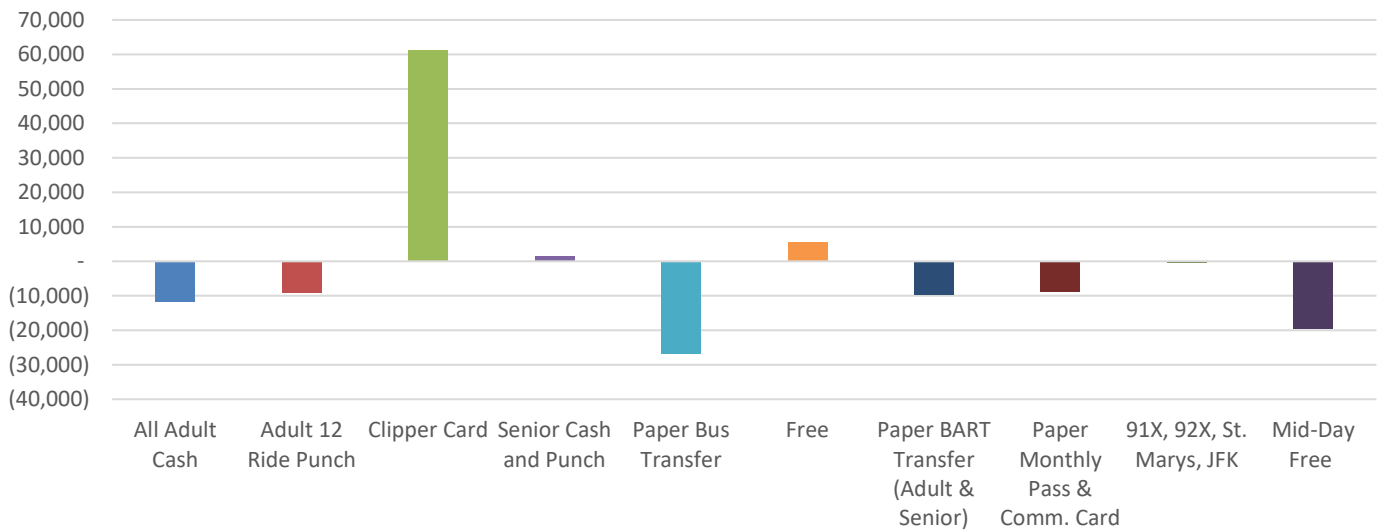
The table below shows the top 10 bus stops in 2019 on weekdays and their average ons and changes from Spring 2018. Concord BART has become County Connection's #1 stop, due to Walnut Creek losing over 400 boardings a day. Ridership Walnut Creek BART was disrupted due to a new transit center opening on March 23<sup>rd</sup>. Initially, there was some confusion as to where the buses were located, as the new transit center is not in a logical walking path to downtown. Route 4 likely lost ridership due visibility issues, as well as some issues with our data system that should be fixed for the Fall bid. The loss of 400 riders at Walnut Creek BART would account for about half of the ridership decline from May 2018 to May 2019.

<b>Top 10 Bus Stops, Spring 2019</b>	<b>Average Ons</b>	<b>Change from 2018</b>
Concord BART	1,276	-68
Walnut Creek BART	1,256	-405
Pleasant Hill BART	633	-71
Diablo Valley College	358	-40
Minert Rd/Weaver Ln	291	-42
Dublin Pleasanton BART	249	-15
San Ramon Transit Center	247	-51
Orinda BART	164	16
Martinez Amtrak	161	-42
Contra Costa Blvd/Viking Dr	117	-13

### Fare Demographic Shifts

Most of the routes that lost ridership had a high number of cash payment, midday free usage, and paper transfers. The reduction in ridership may have been affected by the fare change, which increased the cash base fare by 50 cents (on local routes) and 25 cents (on express routes), eliminated midday-free and eliminated paper transfers. Additionally, weekend riders tend to be our most transit dependent, and the elimination of the paper transfers ended a long standing 3 hour paper transfer window on weekends. This may have suppressed some ridership. Transfers are now Clipper only and they are capped at 2 hours, every day. The table below shows that more Clipper use absorbed most of these eliminated fare products, with 60,000 more Clipper taps per month on average over March-May. In May 2019 after the restructure, Clipper use soared to 71%, doubling use over May 2018.

Change in Fare Demographics (March thru May Average, 2019 to 2018)



### Route Level Information

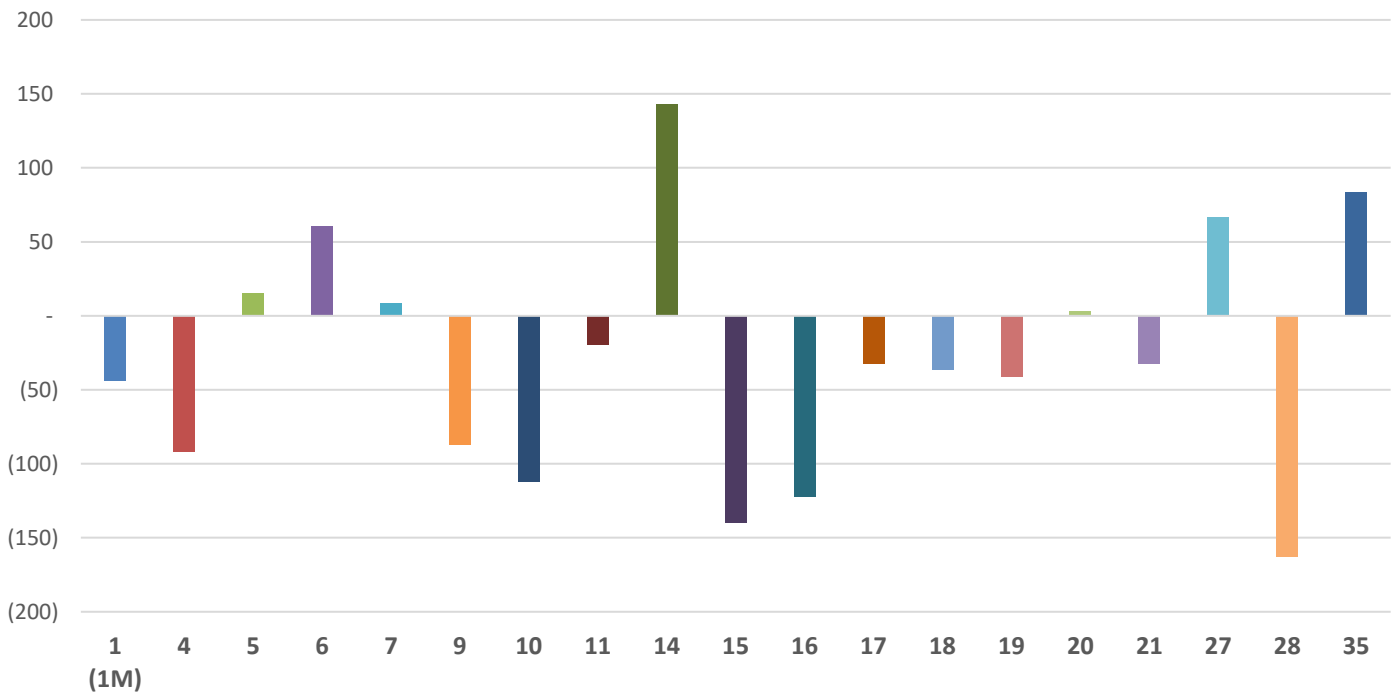
Route level graphs and accompanying text are included on the preceding pages, including Local), Express and Weekend Routes.

#### Average Weekday Local Ridership

The more significant drops in ridership on local routes included Routes 10, 16, and 28, all of which had a high percentage of cash payment. Routes 10 and 28 had coverage reduced, with less Route 10's going all the way to Clayton and Route 28 terminating at DVC. Route 27 picked up about a third of the Route 28 riders in the North Concord area. Routes that were eliminated include 1M, 2, 25, and Route 36, which are not shown on this graph. Route 15's losses were largely made up by Route 14's extension to Walnut Creek BART, which covered the area formerly served by Route 15. Route 4 had some data issues that staff is in the process of fixing, which derived from technical issues that arose when service shifted to the new Walnut Creek Transit Center. This also reduced visibility by locating the bus stop outside of the normal walking path to downtown.

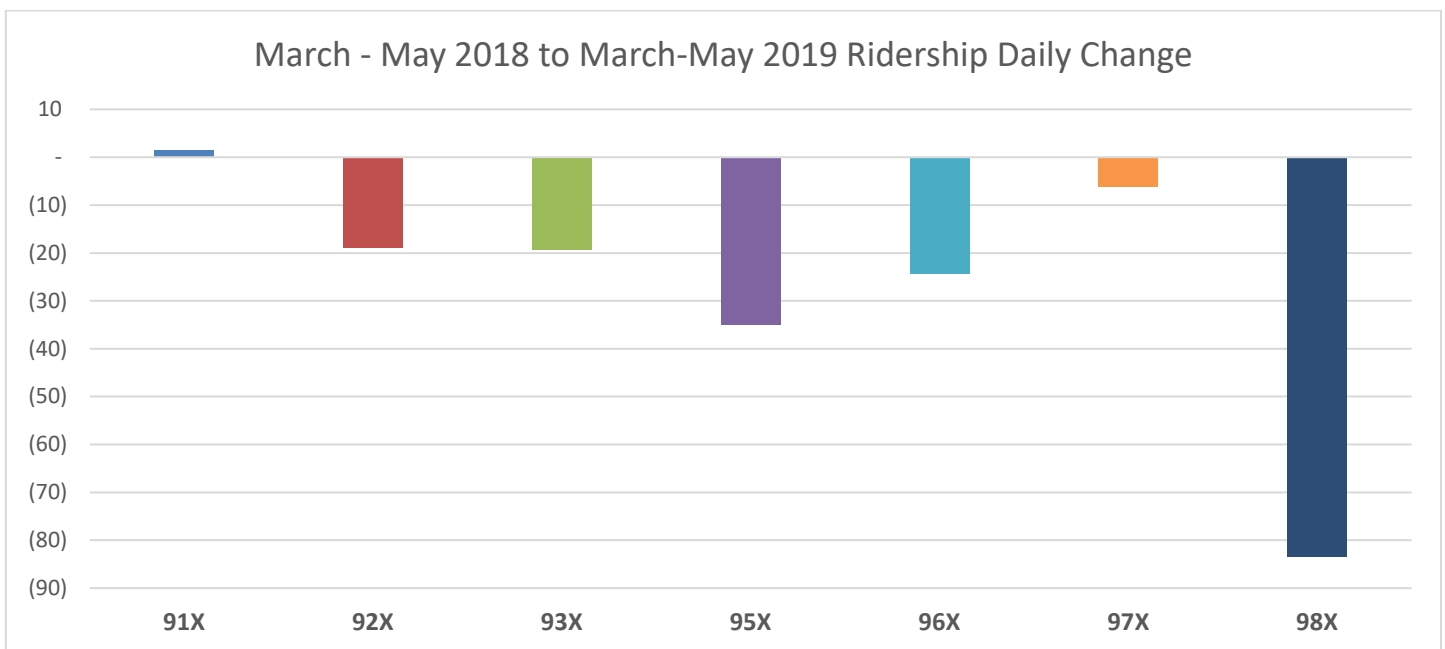
Ridership increased by nearly 150 daily riders on Route 14 and over 50 on Routes 6 and 35, all of which had increased service as part of the restructure.

March - May 2018 to March-May 2019 Ridership Daily Change



### Average Weekday Express Ridership

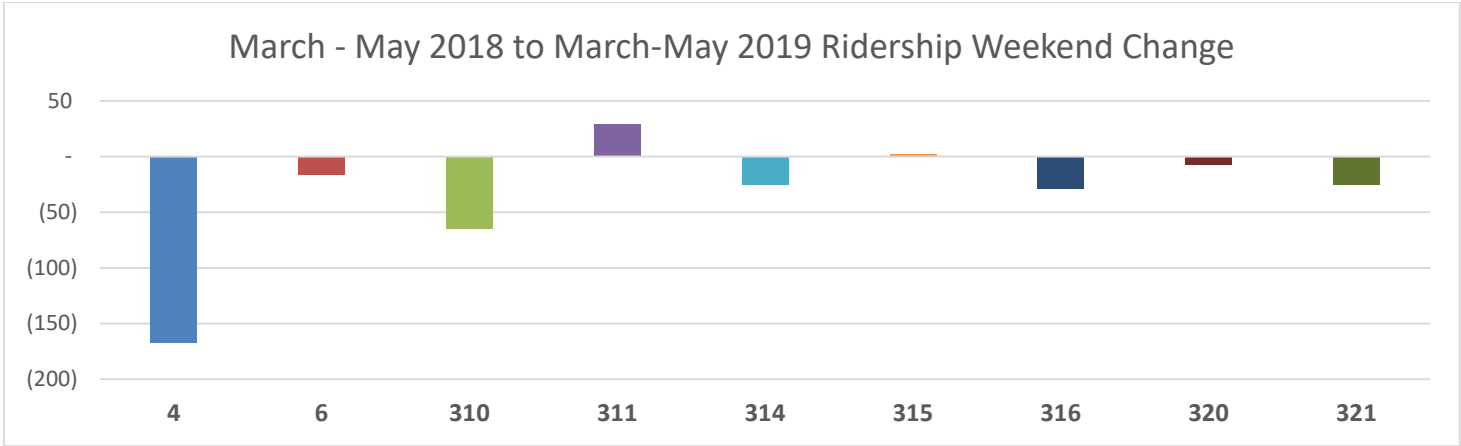
Express routes were all down except for a modest increase on Route 91X. Alignments were changed on Route 92X (small portion of Alcosta Blvd. removed), 93X had an express trip converted to an all stops pattern and 98X had its last trip eliminated but got two new round trips at each peak period. Route 98X, which operates all day service, was down over 83 daily riders (-31%) over the three month period, likely due to the fare changes as 98X had a lot of cash, midday free, and transfer use. Route 99X was implemented in August 2018, therefore data is not available. During the restructure, Route 99X was rerouted off Highway 4 and onto Arnold Industrial Way, with service to the Concord Adult Homeless Shelter. This has increased ridership by about 38 riders a day over the daily average prior to the restructure.



### Average Weekend Ridership

Weekend ridership was down except for an increase on Route 311, which was extended to John Muir Medical Center in Walnut Creek. This increase accommodated most of the Route 301 passengers, who switched to the John Muir Medical segment of the 311 after Route 301 was cancelled as part of the changes.

The 310 was down, once again likely due to fare changes. The route was extended to Downtown Clayton, running at a frequency of every two hours. During the first three months of the changes, there were about 20 daily weekend boardings within the City of Clayton on this new Route 310 extension. Like the weekdays, Route 4 weekend service experienced a drop that was a combination of a data issue that is currently being fixed, as well as some declines due to rider confusion associated with the new Walnut Creek Transit Center.



600-Series Average Weekday Ridership

Ridership on the select 600-series ridership that operates on school days only stayed remarkably flat in the survey period, with only 1% decline over the three-month period. This could indicate that regular riders like students that need transportation to school every school day are not affected by the fare increase as much.

**Conclusions**

It appears that the largest impacts of the restructure were to occasional riders, with ridership on peak only routes staying mostly the same. Riders who use the system sporadically are reducing their usage, especially populations that do not use Clipper. Anecdotally, operators have noticed that some of their regulars have consolidated errands in order to take less trips to save money on bus fare.

Staff believes that although the service change created some disruption and ridership has not recovered, there were significant operational efficiencies achieved to reduce costs. Considering the changes in the fare structure (cash increase and elimination of paper projects) and an overall service cut, staff is hopeful ridership will level off. Staff expects ridership to settle out somewhat in the next few months, when riders discover some of the newer service. Ridership on the trip times that most closely resembles the previous schedules are getting the most ridership, with the new service still emerging. After analyzing the fare data, staff believes most of the ridership drops can be attributed to the fare changes, not the service changes. Should the service increases on productive routes not occurred, ridership losses could have been much worse.

Staff is monitoring the service daily, and steps will be taken to either market lightly used service or to plan tweaks in the future to match rider demand. Staff also expects increased ridership during the planned free fares pilot on the 11, 14, and 16, as part of our Low Carbon Transit Operations Program (LCTOP) funded program.

**Financial Implications:**

None.

**Recommendation:**

Staff requests that the O&S committee forward this to the full Board as an information item.

**Action Requested:**

None, for information only.