

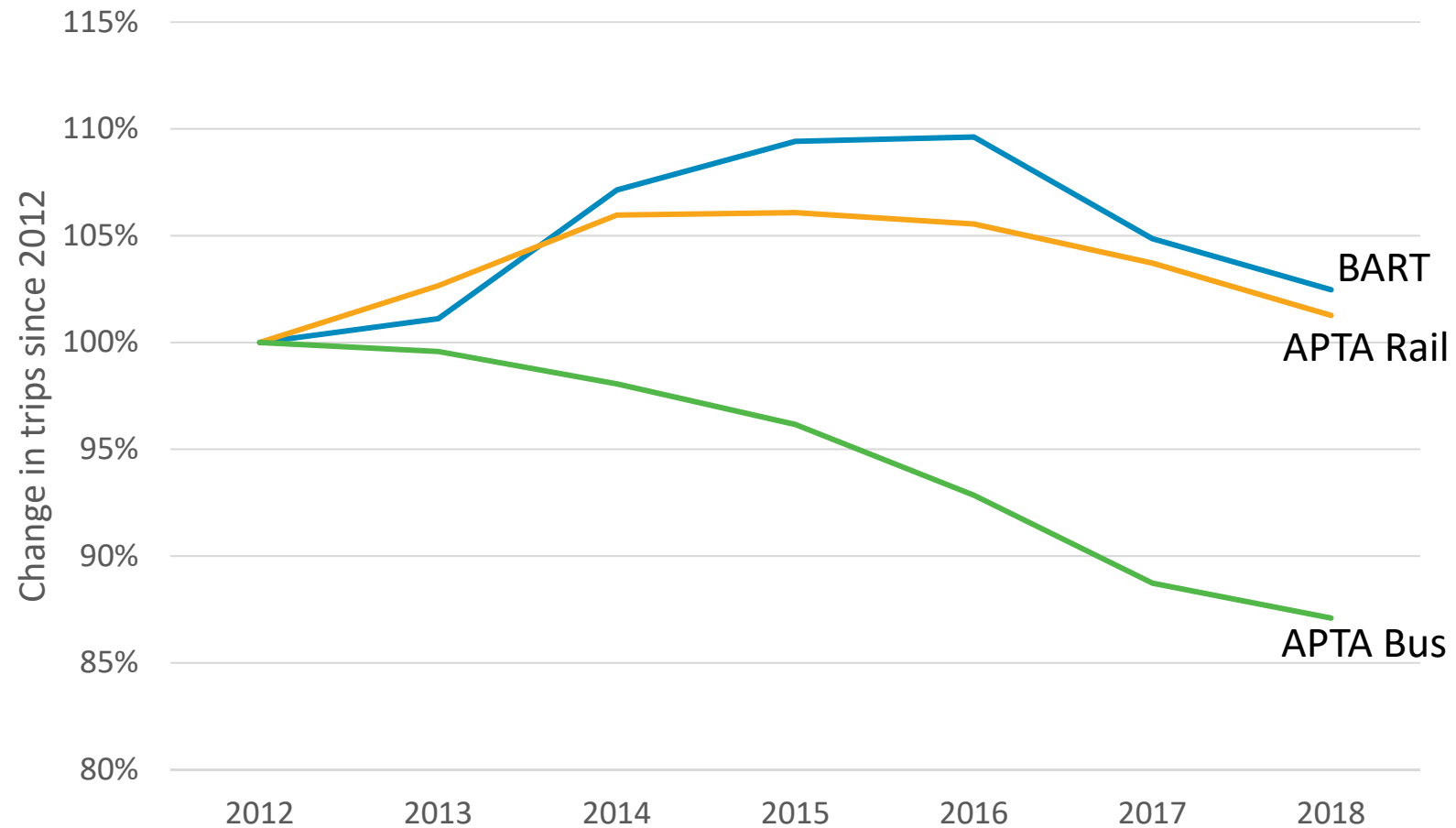


# Rebuilding Ridership

BART Board 2020 Workshop

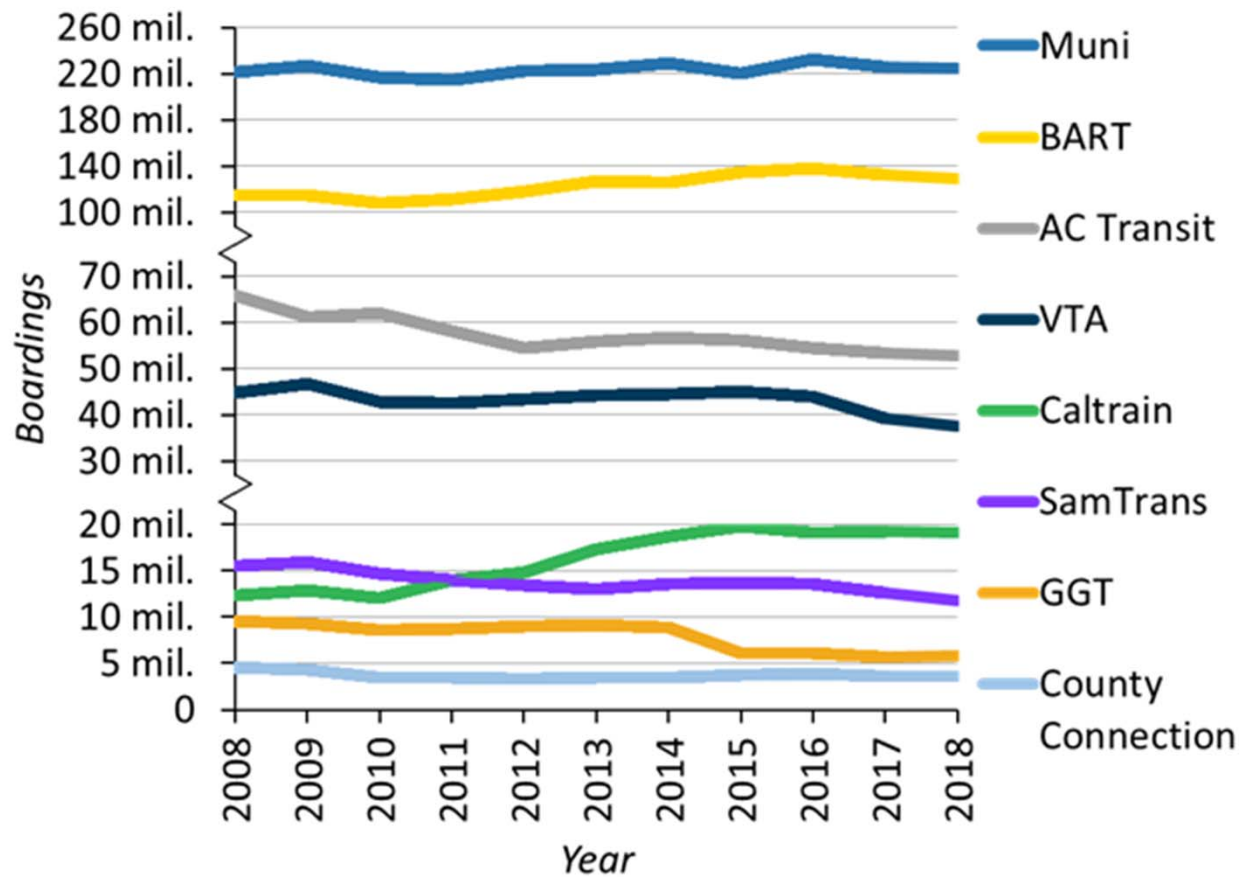


# BART Ridership Compared to National Trends



Source: APTA and NTD, Unlinked Passenger Trips

# Bay Area Trends



Data source: National Transit Database  
Source: MTC UCLA Study, 2019, NTD

# Possible Causes for Bay Area Ridership Declines

*Suggestive evidence:*

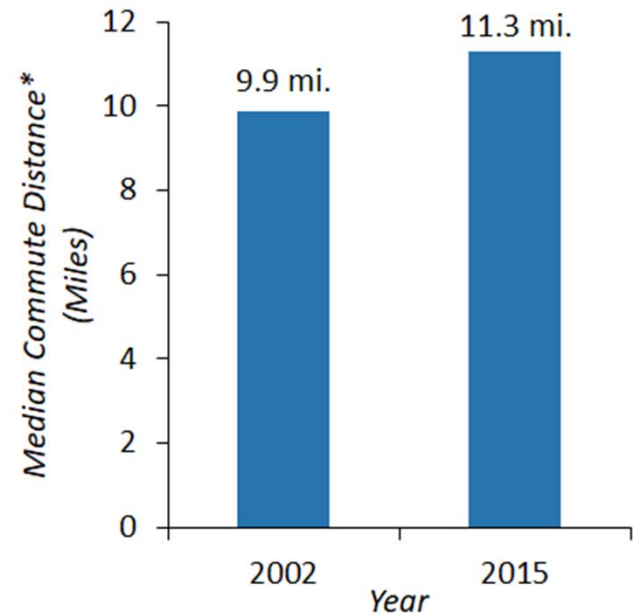
## 1. Changing residential locations relative to jobs

- Context: Bay Area housing affordability crisis. Commutes are getting longer, especially among lower-income residents
- Some concentration of jobs and workers in transit-rich neighborhoods, but *much more* ongoing dispersion in other areas of the region

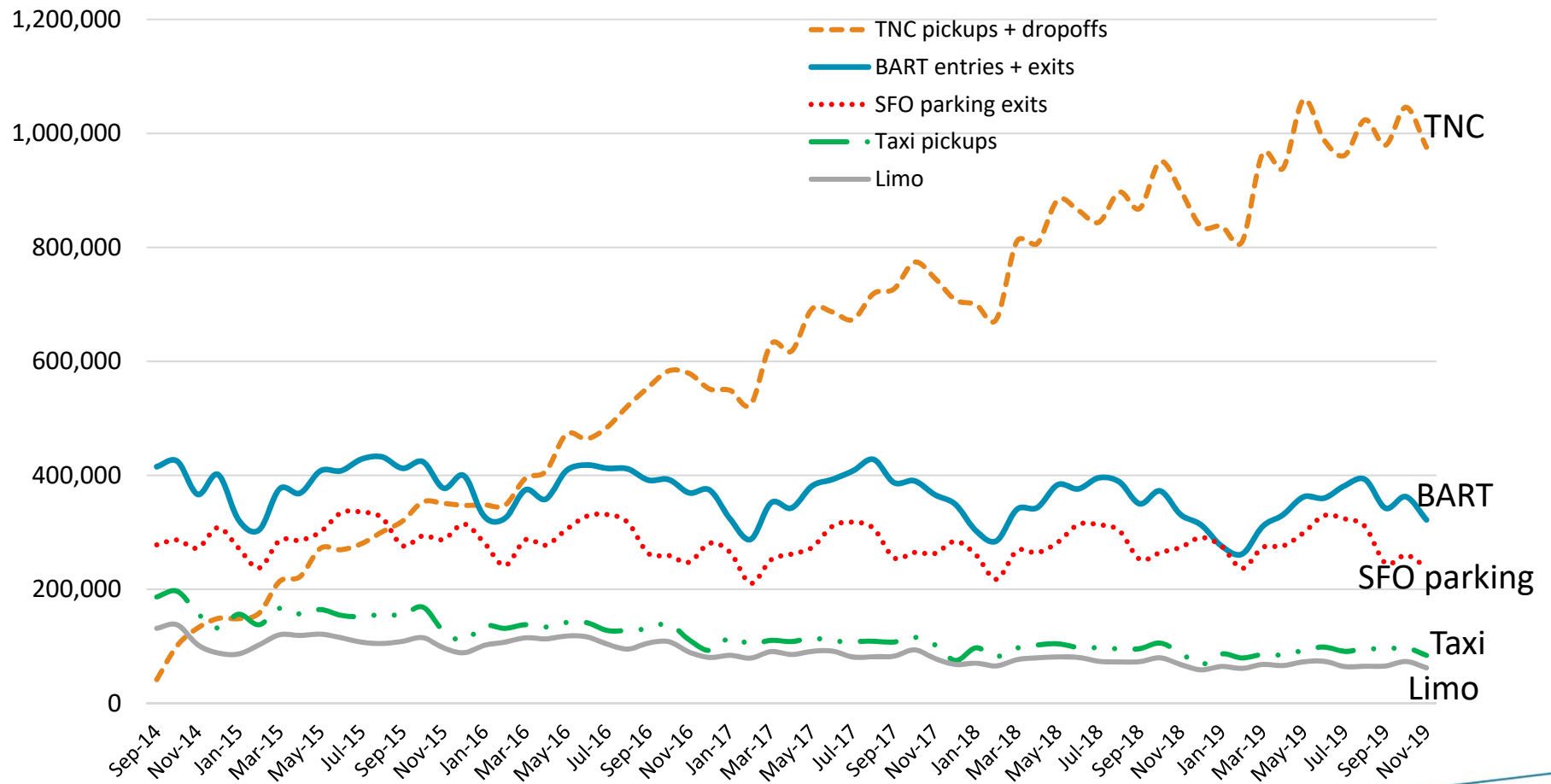
## 2. Ridehail/TNCs

- Ridehail use appears to be highest *where* transit use is highest.
- Ridehail's strongest market is *when* transit is most losing riders: off-peak.
- Very hard to say more without better TNC data

Source: MTC UCLA Study, 2019

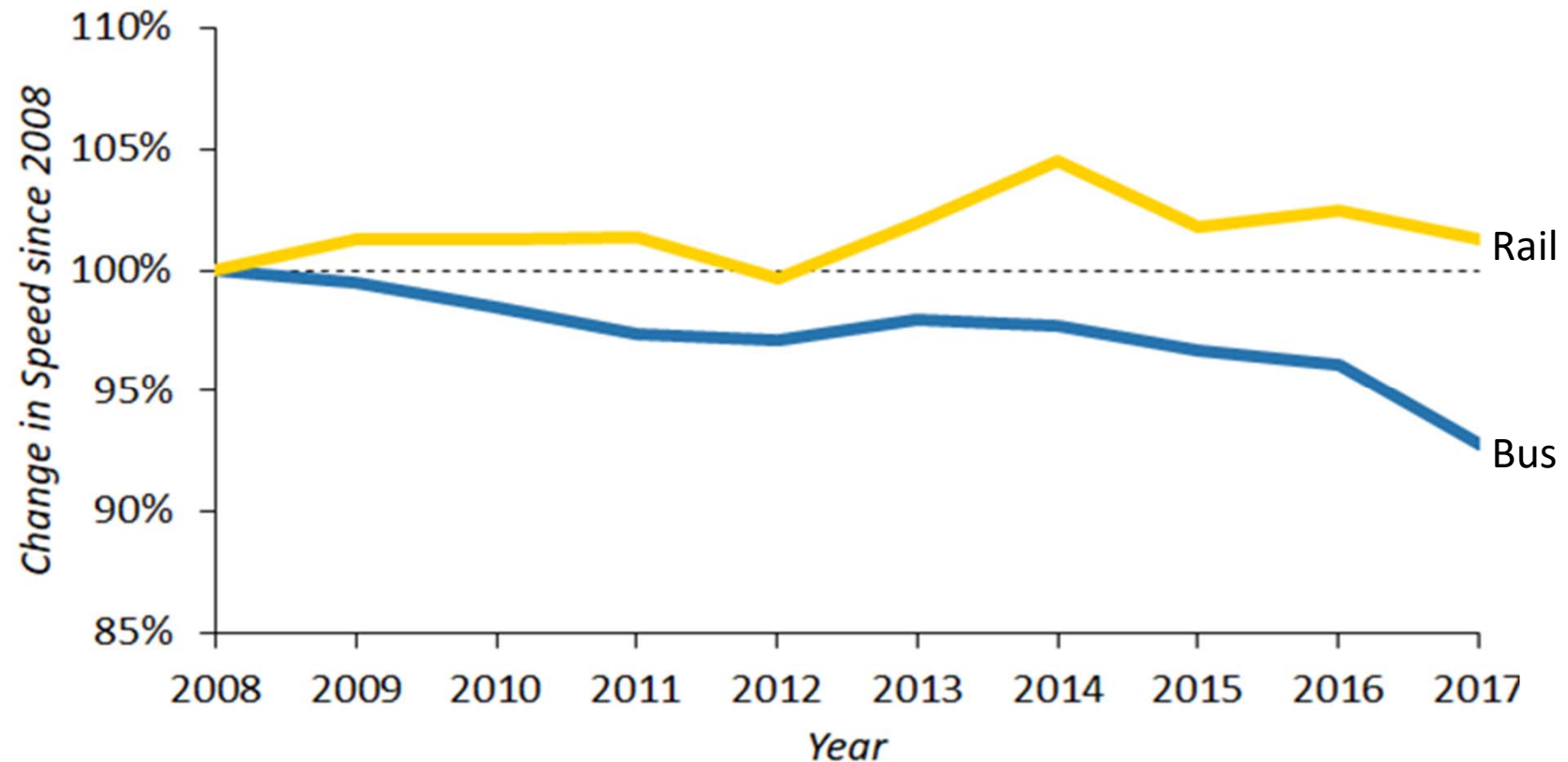


# SFO Ground Transportation Trends



Source: BART Financial Planning and SFO. Note: excludes noncommercial pickups and drop-offs, e.g. by friends and family.

## Warrants Further Exploration: Congestion



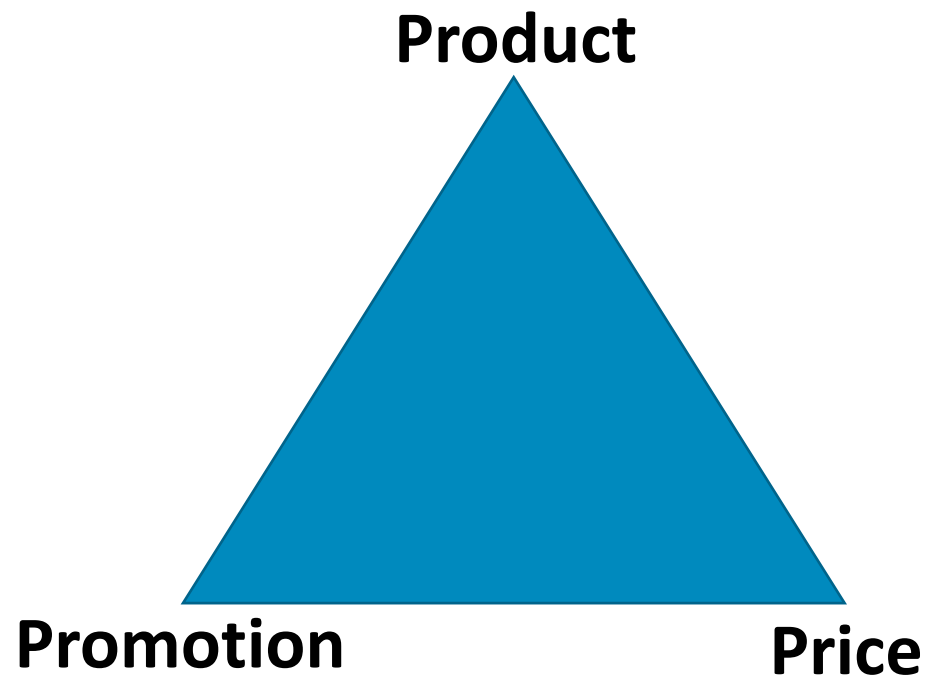
Source: MTC UCLA Study, 2019

# Factors Affecting Large Rail Systems (Excluding NY)

Factor	% Change 2012 - 2018	Estimated Ridership Impact
Vehicle Revenue Miles	+11.1%	<b>+12.0%</b>
Population + Employment	+6.1%	<b>+2.5%</b>
Bike share	n/a	<b>+0.9%</b>
% of Population in Transit Supportive Density	+0.8%	<b>+0.1%</b>
Average Fare (2018\$)	+13.3%	<b>-4.7%</b>
Average Gas Price (2018\$)	-29.0%	<b>-4.6%</b>
Electric Scooters	n/a	<b>-3.1%</b>
Median Per Capita Income (2018\$)	+11.2%	<b>-2.9%</b>
Years Since Ridehail start	n/a	<b>-1.5%</b>
% of Households with 0 vehicles	-6.8%	<b>-0.5%</b>
% Working at home	+24.7%	<b>-0.4%</b>
Total Modeled Ridership		<b>-2.3%</b>
Total Observed Ridership		<b>-3.0%</b>
Unexplained Change		<b>-0.8%</b>

Source: draft model results, TCRP Project 43, based on nationally available data

# Fully Integrated Ridership Development – 3P's





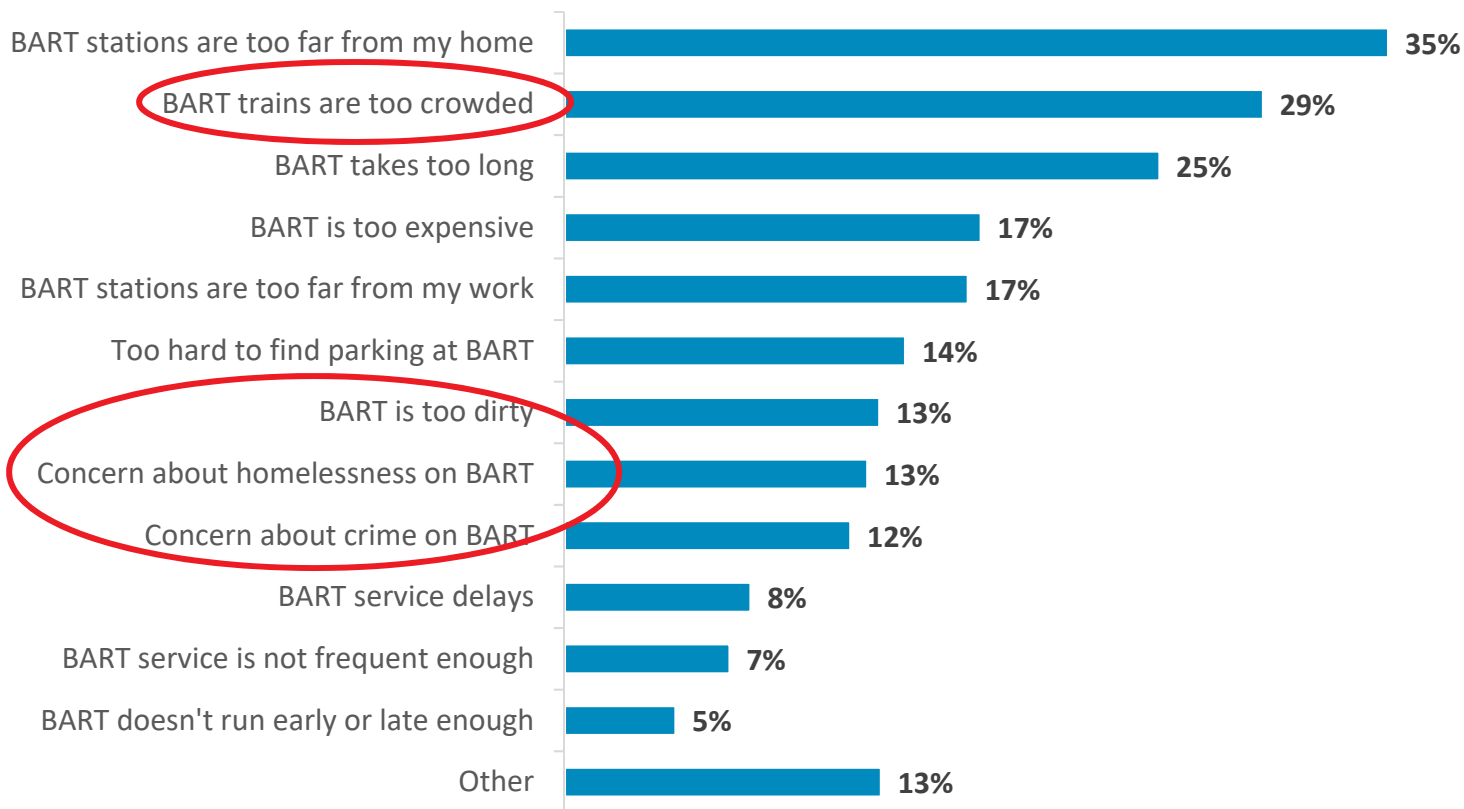
# Customer Comments

## General Manager Listening Tour

- Riders are thankful to have BART as an option and want to see BART succeed
- Riders are frustrated with crowding, cleanliness, and lack of security
  - “Lots of anti-social behavior on the trains and loitering in the stations”
  - “Nights are sketchy”
  - “Sundays are unreliable”
  - “I take Uber on weekends because I feel unsafe on BART”
- Plan to continue Listening Tours to keep focus on ridership and customer satisfaction

# BART – Why Not Commute on BART?

**Q. Why don't you currently ride BART as your usual way of getting to work?** (Select up to three.)

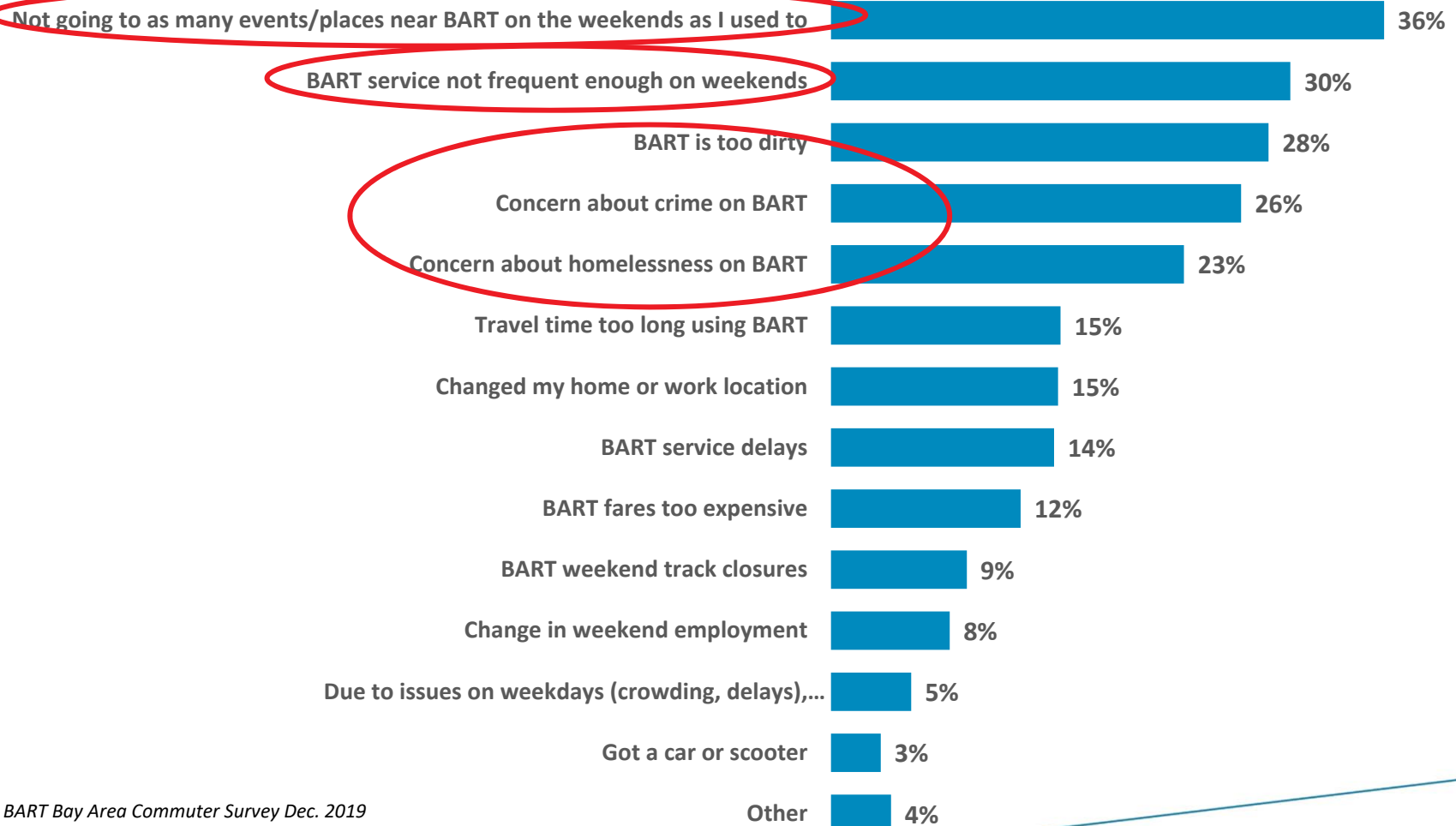


Source: BART Bay Area Commuter Survey Dec. 2019  
Base: Very or somewhat possible to commute on BART: 146

# BART - Why Not Ride BART on Weekends?

- About 29% of 5-county commuters say they're riding BART less on weekends vs a year ago.

Q. What are the main reasons you are riding BART less often on weekends, compared to a year ago? (Select up to three.)



Source: BART Bay Area Commuter Survey Dec. 2019  
Base: Riding less on weekends: 192

# Market Segment Assessments



# Peak

## - Challenges:

- Crowding
- First/last mile

## +Opportunities:

- +Frequent, reliable BART service
- +Longer Transbay trains (base trains at 10 cars April 2020) will provide some crowding relief
- +Relieve Freeway congestion
- +New forms of access could help relieve parking constraints (e.g. TriDelta Tri MyRide service)

Note: Reverse commute has lots of capacity (but this market is constrained by less freeway congestion and free parking at worksites)

### Market Information:

CY19 Gross Revenue*	~\$314M
CY19 Trips	74M
% Change vs CY18	+0.6%

\*Note: gross revenue provides order of magnitude only for each segment and does not incorporate discounts.



# Mid-Day

## - Challenges:

- Limited BART parking
- Lighter freeway traffic makes driving attractive
- Growth of online shopping

## +Opportunities:

- +Good service, adequate capacity

### Market Information:

CY19 Gross Revenue	~\$71M
CY19 Trips	17.2M
% Change vs CY18	-1.2%



# Evening

## - Challenges:


- Transbay Tube single tracking weeknights (Sunday – Thursday) after 8 pm in SF
- Rider safety concerns
- Sports team relocations
- Rapid growth of Uber/Lyft

## +Opportunities:

- +Evening focus for police presence/ambassadors
- +Available capacity
- +Plenty of free BART parking

### Market Information:

CY19 Gross Revenue	~\$48M
CY19 Trips	11.4M
% Change vs CY18	-4.9%



SHARE

Enter for a chance to see illusionist Shin Lim in San Francisco

**When:** Saturday, Jan. 18 at 7:30pm

**Where:** 1 Taylor Street  
San Francisco, CA 94102

**BART Station:** Powell St. (SF)

**Walk Time:** 5 minutes

Website: [Shin Lim](#)



# Saturday

## - Challenges:

- Spring/Summer/Fall weekend track closures
- Rapid growth of Uber/Lyft

## +Opportunities:

- +Decent service
- +Plenty of free BART parking
- +Saturday focus for police presence/ambassadors

### Market Information:

CY19 Gross Revenue	~\$35M
CY19 Trips	8.3M
% Change vs CY18	-6.1%



SHARE

Win tickets to "The Just and the Blind" at SFJAZZ

**When:** Saturday, Jan. 18 at 7:30pm

**Where:** 201 Franklin Street  
San Francisco, CA 94102

**Walk Time:** 8-10 minutes

Website: [SFJAZZ](https://www.sfjazz.org)



# Sunday

## - Challenges:

- Limited service
- Frequent RR Single Tracking in SF
- Spring/Summer/Fall weekend track closures
- Rapid growth of Uber/Lyft

## +Opportunities:

- +Plenty of free BART parking
- +Feb 10 service change

### Market Information:

CY19 Gross Revenue	~\$26M
CY19 Trips	5.8M
% Change vs CY18	-7.5%



# Airport

## - Challenges:

- Rapid growth of Uber and Lyft
- BART hours of service
- Premium price, but competitive for occasional airport trips
- Many airline and hotel digital channels require national coverage

## +Opportunities:

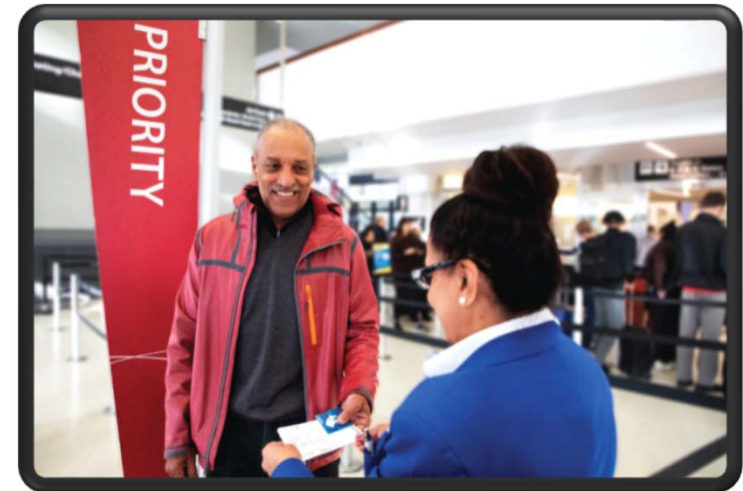
- +Good service from both airports to downtown SF during most periods
- +BART signage at airports is improving
- +Possible Clipper Mobile payment

### Market Information:\*

CY19 Gross Revenue	~\$44M
CY19 Trips	4.9M
% Change vs CY18	-4.2%

#### \*Notes:

- Includes entries and exits at SFO and OAK.
- Net revenue is significantly less than the gross revenue for this segment due to additional special discount programs at the two airports.



# Ideas To Incentivize Weekend Ridership

**Goal: Attract new riders, spur more use among existing riders, and thank riders for their patience.**

Idea A: Discount weekend Clipper fares

Idea B: Weekend flat fare round trip via mobile ticketing

Idea C: Open faregates 8 am - noon on selected Saturdays or Sundays

Idea D: Increase distribution of free weekend promotional tickets

## Ideas Evaluated for:

- Technical feasibility
- Time to implement
- Financial impact
- Effectiveness



# Options To Incentivize Ridership

## 1. Double the distribution of weekend promotional tickets

- This is the most technologically viable path in the short term.
- Recent data on distribution of one-way weekend promotional tickets to weekday commuters shows that this reduces revenue, but only \$.15 on the dollar due to additional paid rides that are generated.
- Would require \$600K increase in the promotional ticket budget.
- Increase in Marketing distribution budget: \$50,000
- Increase in Treasury requirements to encode tickets: \$30,000



# Options To Incentivize Ridership

## 2. Fleet of the Future Family Saturday

- Run extra FOF trains
- Kids ride free 9 am – 4 pm when accompanied by an adult
- Promote download of the official BART app to find FOF trains to board
- Free prizes for both kids and adults while supplies last
- Have ambassadors on board to call attention to improved safety
- Chance to win additional prizes if signup for BARTable email newsletter
- Revenue impact: minimal
- Would require \$400K budget for giveaways and advertising for the event

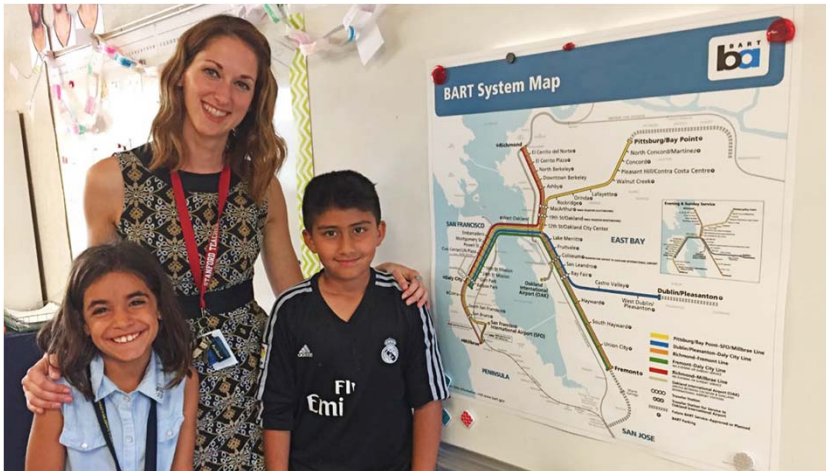




# Options To Incentivize Ridership

## 3. Obtain sponsors to expand free field trips.

- Staff is finalizing MOU with non-profit organization to receive tax deductible donations
- Bay Area teachers often lack the resources to fund field trips to enrich the education they provide to Bay Area children. As such, many children, especially those from lower income communities, are not able to learn about Bay Area culture, history, outdoor spaces and science.
- At the same time, BART has extra capacity to carry riders during school hours.



"This program was so fantastic. It made an otherwise impossible field trip possible for our students-many of whom have never been on BART and some of whom have never been to San Francisco at all!" - San Leandro Unified teacher.

"We lost our Title 1 funding this year, but still have many students who cannot pay for trips! This program allowed us to come [on this trip], many students saw San Francisco for the first time!" - Berkeley Arts Magnet teacher.

# Longer Term Options To Incentivize Ridership

- **C2 Promotional fares**
- **C2 Accumulator pass**
- **App-based rewards**

## **Half price**

Ride BART to the 2020 MLK celebration  
Exit at Powell Street Jan 20, 11 am and 2 pm

## **Half price**

Ride BART to the SF Chinese New Years parade  
Exit at Civic Center Station, February 8, 3 – 7 pm

## **30% discount**

Ride BART to Oakland Art Murrum First Friday  
Exit at 12<sup>th</sup> or 19<sup>th</sup> Oakland, May 18<sup>th</sup> 5-9 PM

## **40% off**

Ride BART to the A's  
Exit at Coliseum Station, April 18<sup>th</sup> or 19<sup>th</sup> 11 am – 2 pm

## 8 Additional Ridership Efforts for FY21

1. Continue to grow BARTable followers, subscribers, and engagement. Expand content to encourage people to get off their couch and enjoy the Bay Area. Add new BARTable “outdoors” section. Continue robust marketing to conference organizers.
2. Promote SFO Priority Lane pilot program.
3. Possible extension of the Airport Group Discount App.
4. Look for opportunities to expand the Higher Education Discount Program (funded by colleges).
5. Participate in national and regional promotions e.g. Get On Board Day, Bike To Work Day.
6. Promote opening of new stations in Santa Clara County.
7. Promote Means-based discount program.
8. Distribute kids ride free weekend promotional tickets at fairs and festivals



# BART Strategic Action Plan on Homelessness Framework



# Strategic Action Plan

- Result of efforts led by the District over the past 6 years
- Aims to strategically expand our vision for the next 5 years and how to make it happen.
- Focuses on the following five key areas:
  - Coordination & Partnerships
  - Data Collection & Analysis
  - Education & Awareness
  - Customer Experience
  - Funding Strategies & Resource Development

# Purpose

- Capture all efforts in one strategic document & identify additional efforts need to make an impact
- Communicate BART's vision, goals, strategies and action items to our customers, partners and stakeholders
- Highlight BART's commitment to addressing homelessness in our system
- Advocate for resources & partnerships. BART is not equipped to handle this crisis, so if we're being asked to do more, we must have federal, state, regional and local support.



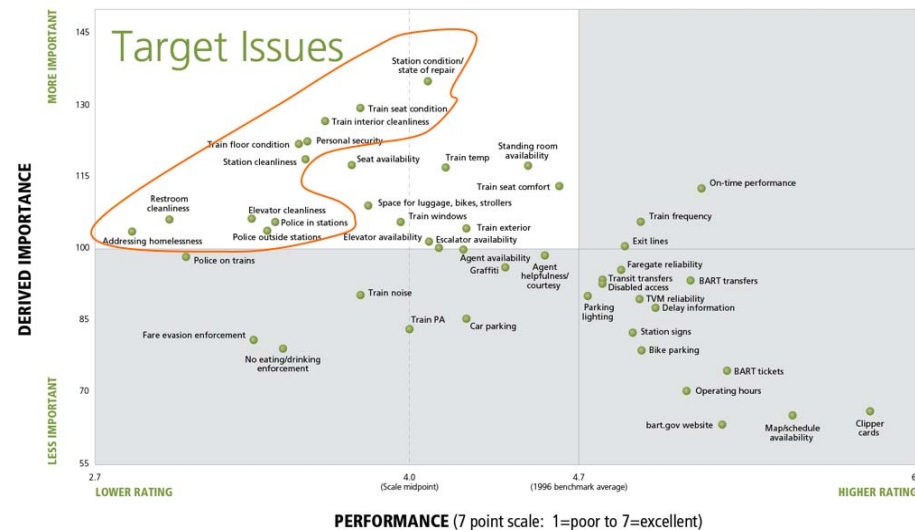
# Coordination & Partnerships

- Work closely with cities and counties where BART serves to address homelessness with an integrated and collaborative approach:
  - Monthly Multi-Disciplinary Forensic Team Meetings
  - Encampment Management
  - Crisis Intervention Training
  - Law Enforcement Assisted Diversion
  - Partnership with The Salvation Army Red Kettle Campaign



# Data Collection & Analysis

- Conduct comprehensive surveys of customers & employees, solicit feedback on their experiences and observations of homelessness in the system.
- Collect, review and analyze data from homeless outreach teams, Pit Stops restrooms, entrances, elevators, station and trains.
- BART will continue with successful initiatives, modify those that need some adjustments and/or recommend pilots to try new things.



# Education & Awareness

Educate customers and BART staff on the issues of homelessness:

- Homeless have civil rights protection and cannot be kicked out due to their presence, smells and behavior. However, if they have violated our Code of Conduct, they are escorted off our premises.
- BART cannot force homeless individuals to seek help, services and treatment.
- Encourage customers to report safety threats and infractions on BART App
- Staff training on how to handle the homeless in the system.



# Customer Experience

- Tailored strategies for different parts of the system. Focus on safety & security (presence in the system) & cleanliness

- Major Programs
  - Safety & Security
  - Fare Evasion
  - Homelessness
  - Cleanliness

Location	Engage + Support	Engineer + Maintain	Enforce + Monitor
Non-Stations / Right-of-Way <ul style="list-style-type: none"> <li>Along tracks (incl. East Bay Greenway)</li> </ul>	<ul style="list-style-type: none"> <li>Contact local jurisdictions and ascertain willingness to assume ownership – need to know their intentions</li> </ul>	<ul style="list-style-type: none"> <li>Identify &amp; Secure Property (incl. better fencing)</li> </ul>	<ul style="list-style-type: none"> <li>No Camping Ordinance (DRAFT)</li> <li>No Trespassing Ordinance</li> </ul>
Yards (Concord, Richmond, Daly City, HMC)	<ul style="list-style-type: none"> <li>Contact local jurisdictions and ascertain willingness to assume ownership – need to know their intentions</li> </ul>	<ul style="list-style-type: none"> <li>Identify &amp; Secure Property (incl. better fencing)</li> </ul>	<ul style="list-style-type: none"> <li>No Camping Ordinance (DRAFT)</li> <li>No Trespassing Ordinance</li> </ul>
Remnant parcels	<ul style="list-style-type: none"> <li>Contact local jurisdictions and ascertain willingness to assume ownership – need to know their intentions</li> </ul>	<ul style="list-style-type: none"> <li>Identify &amp; Secure Property (incl. better fencing)</li> </ul>	<ul style="list-style-type: none"> <li>No Camping Ordinance (DRAFT)</li> <li>No Trespassing Ordinance</li> </ul>
Stations: Outside Paid Area <ul style="list-style-type: none"> <li>Parking lots / Intermodal Areas</li> </ul>	<ul style="list-style-type: none"> <li>Connect to services</li> <li>Identify &amp; Request to Keep Moving</li> </ul>	<ul style="list-style-type: none"> <li>Lighting</li> <li>Cameras</li> <li>Signage</li> </ul>	<ul style="list-style-type: none"> <li>Identify &amp; Request to Keep Moving</li> <li>No Camping Ordinance (DRAFT)</li> <li>No Trespassing Ordinance</li> <li>Warnings/Citations/Arrests</li> </ul>
Plazas	<ul style="list-style-type: none"> <li>Connect to services</li> <li>SFHOT</li> <li>LEAD SF Program</li> <li>Station Retail / Activation</li> <li>Partner with local jurisdictions                                     <ul style="list-style-type: none"> <li>SF</li> <li>Oakland</li> <li>Fremont</li> <li>Berkeley</li> <li>Other Alameda</li> <li>Contra Costa</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>16<sup>th</sup> St. Plaza                                     <ul style="list-style-type: none"> <li>Added M-F day cleaning shift</li> <li>Increased steam cleaning (3-4 hours / night)</li> <li>Signs in elevators</li> <li>Continue contribution toward SFDPW Pit Stop (street restroom)</li> </ul> </li> <li>Continue and Expand SFDPW Pit Stop (monitored street restroom)</li> </ul>	<ul style="list-style-type: none"> <li>Identify &amp; Request to Keep Moving</li> <li>LEAD SF Program</li> <li>Intervene &amp; Prevent</li> <li>No Camping Ordinance (DRAFT)</li> <li>No Trespassing Ordinance</li> <li>Warnings/Citations/Arrests</li> </ul>
Inside stations	<ul style="list-style-type: none"> <li>Connect to services</li> <li>SFHOT</li> <li>Station Retail / Activation</li> </ul>	<ul style="list-style-type: none"> <li>Street Entrance Barriers</li> <li>Head Houses</li> <li>Zamboni Cleaning</li> <li>Station Brightening / Steam Cleaning</li> </ul>	<ul style="list-style-type: none"> <li>Identify &amp; request to Keep Moving</li> <li>LEAD SF Program</li> <li>Elevator Attendants</li> <li>Warnings/Citations/Arrests</li> </ul>
Stations: Paid Area / Platforms	<ul style="list-style-type: none"> <li>Connect to services</li> <li>SFHOT</li> <li>LEAD SF Program</li> </ul>	<ul style="list-style-type: none"> <li>Re-open underground restroom pilots @ Powell &amp; 19th</li> <li>Hardening – Fare Evasion</li> <li>Cameras</li> <li>Steam Cleaning</li> </ul>	<ul style="list-style-type: none"> <li>Elevator Attendants in SF</li> <li>Proof of Payment</li> <li>Stay Away Order</li> <li>Code of Conduct</li> <li>Warnings/Citations/Arrests</li> </ul>
On Board Trains	<ul style="list-style-type: none"> <li>Connect to services</li> <li>Coordinate with local jurisdictions / service providers (Alameda, Contra Costa, etc)</li> </ul>		<ul style="list-style-type: none"> <li>Proof of Payment</li> <li>Code of Conduct</li> <li>Warnings/Citations/Arrests</li> </ul>



## Quality of Life - Homelessness

# Funding to Address Homelessness

- **State Actions to Address Homelessness**

- Governor's E.O. on Homelessness
- Provides state-owned land and assets to augment local shelter capacity
- Creates a multi-agency strike team to assist local governments, including transit agencies, in moving individuals into shelters and connecting them to services

- **Governor's Proposed 2020-21 Budget**

- Includes \$750 million one-time General Funds to establish the California Access to Housing and Services Fund
- Fund will create structure for developing affordable housing units, supplementing and augmenting rental subsidies, and stabilizing board and care homes.
- **BART is not eligible for state homelessness funding; Governor directing counties to work with transit agencies.**



Counties	Funding	Key Sources
Alameda County	\$306M	Whole Person Care, Mental Health Services Act, AB109, State & County General Fund
Contra Costa County	\$348M	Community Development Block Grant; Emergency Solutions Grant, Home Investment Partnerships, Federal, State, and General Fund.
San Francisco County	\$513M	Community Development Block Grant, Emergency Solutions Grant, Home Investment Partnership,; General Fund, Sales Taxes.
San Mateo County	\$332M	Community Development Block Grant, Emergency Solutions Grant, Home Investment Partnerships, Federal, State, and General Fund.
<b>Total</b>	<b>\$1.50B</b>	



## Next Steps

- Finalize plan in Summer 2020.
- Refresh every 6 months.
- **What more can we do together?**
  - Step up coordination & partnership with counties and cities beyond current program
  - Continue seeking grants opportunities
  - Continue engaging the state on funding eligibility
  - Engage private sector



