

Transit Operator Perspectives

MTC Commission

October 25, 2023



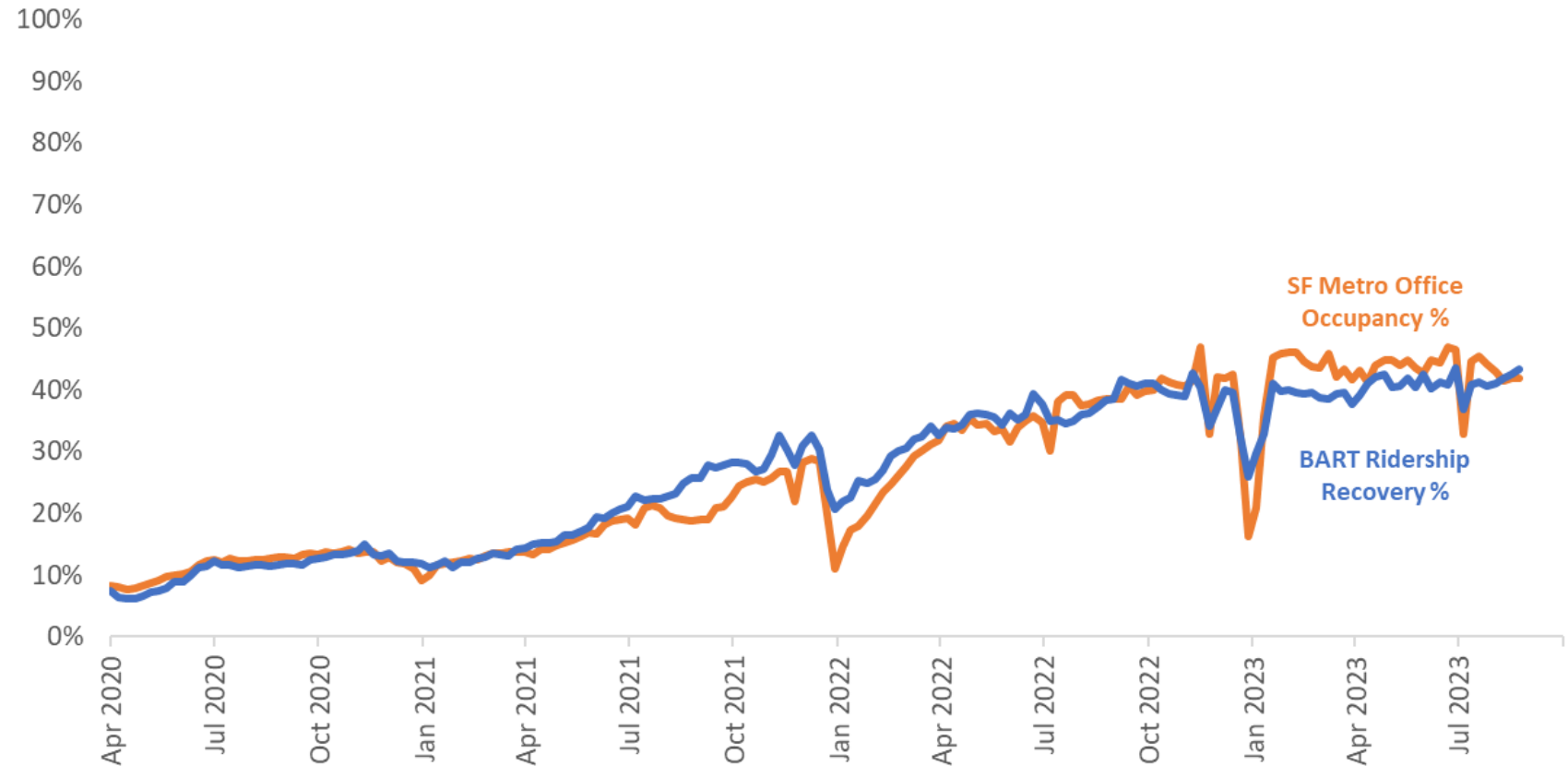
Post-Pandemic Travel Trends

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

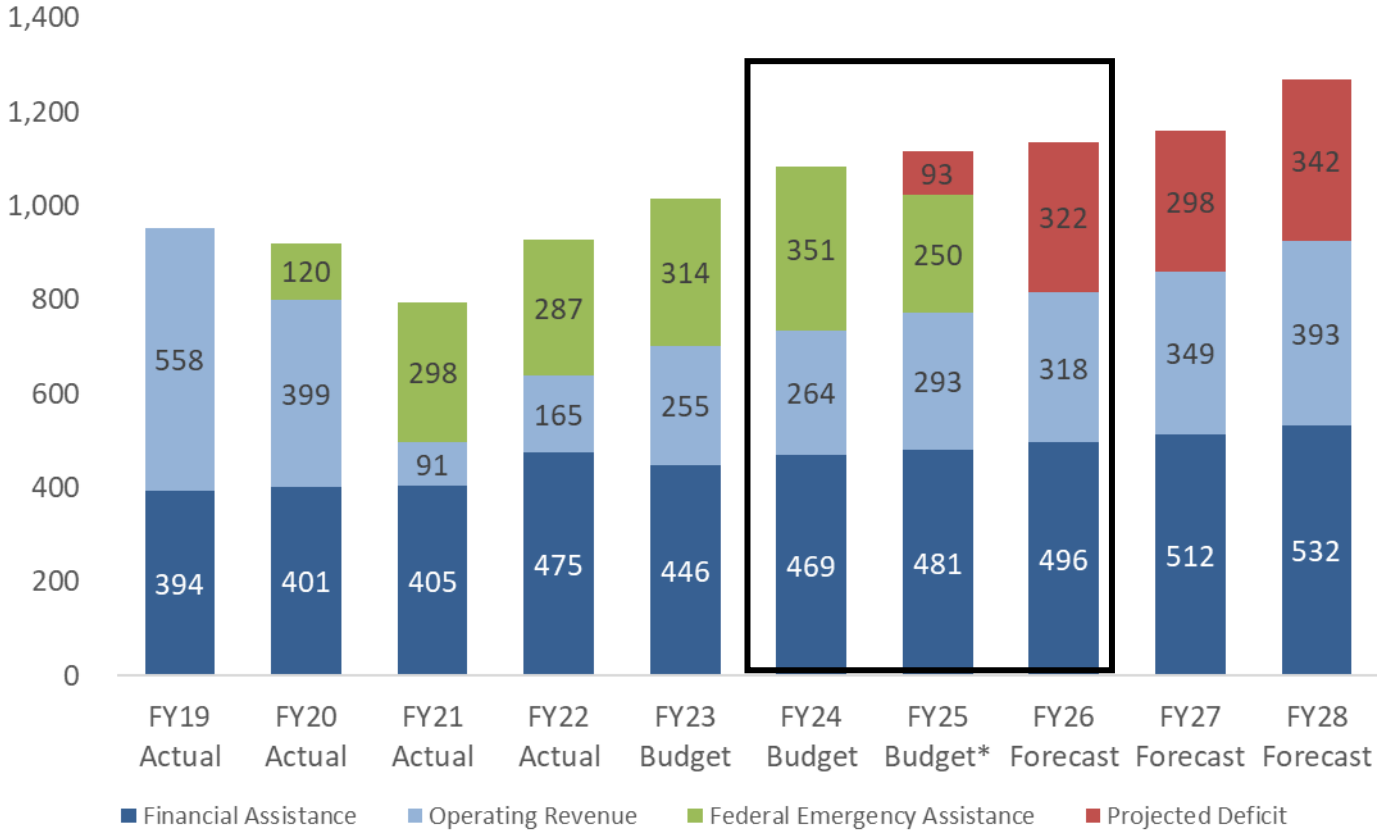
BART Ridership and SF Metro Area Office Occupancy



BART

Financial Status

Operating Sources by Type (\$M)



* Federal emergency assistance fully expended in FY25

Pre-pandemic, BART was highly self sufficient:

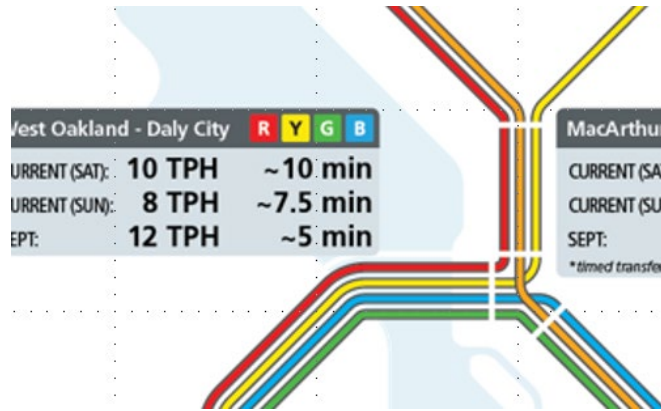
- 60-70% farebox recovery
- Operating allocations to critical capital reinvestment projects

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



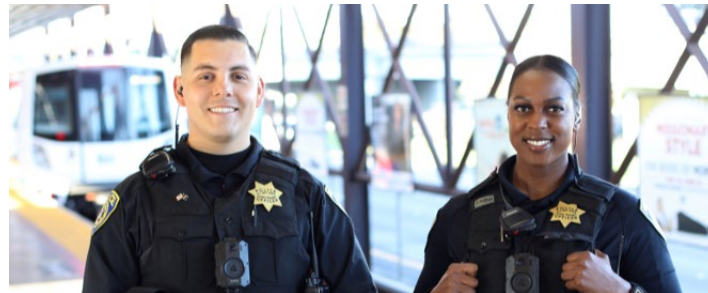
Improving rider safety & security

- 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



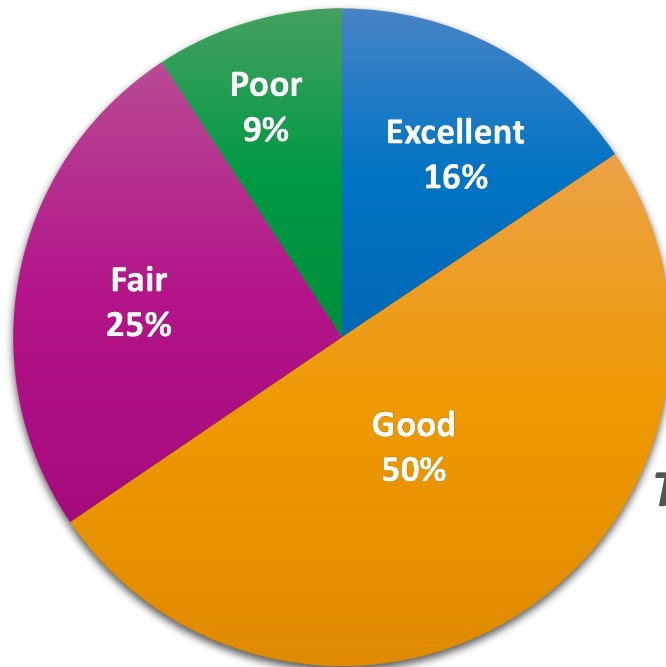
Cleaner vehicles, stations, transit shelters



More security personnel

Riders are noticing through recent Muni perception surveys.

Overall, how would you rate Muni's service?



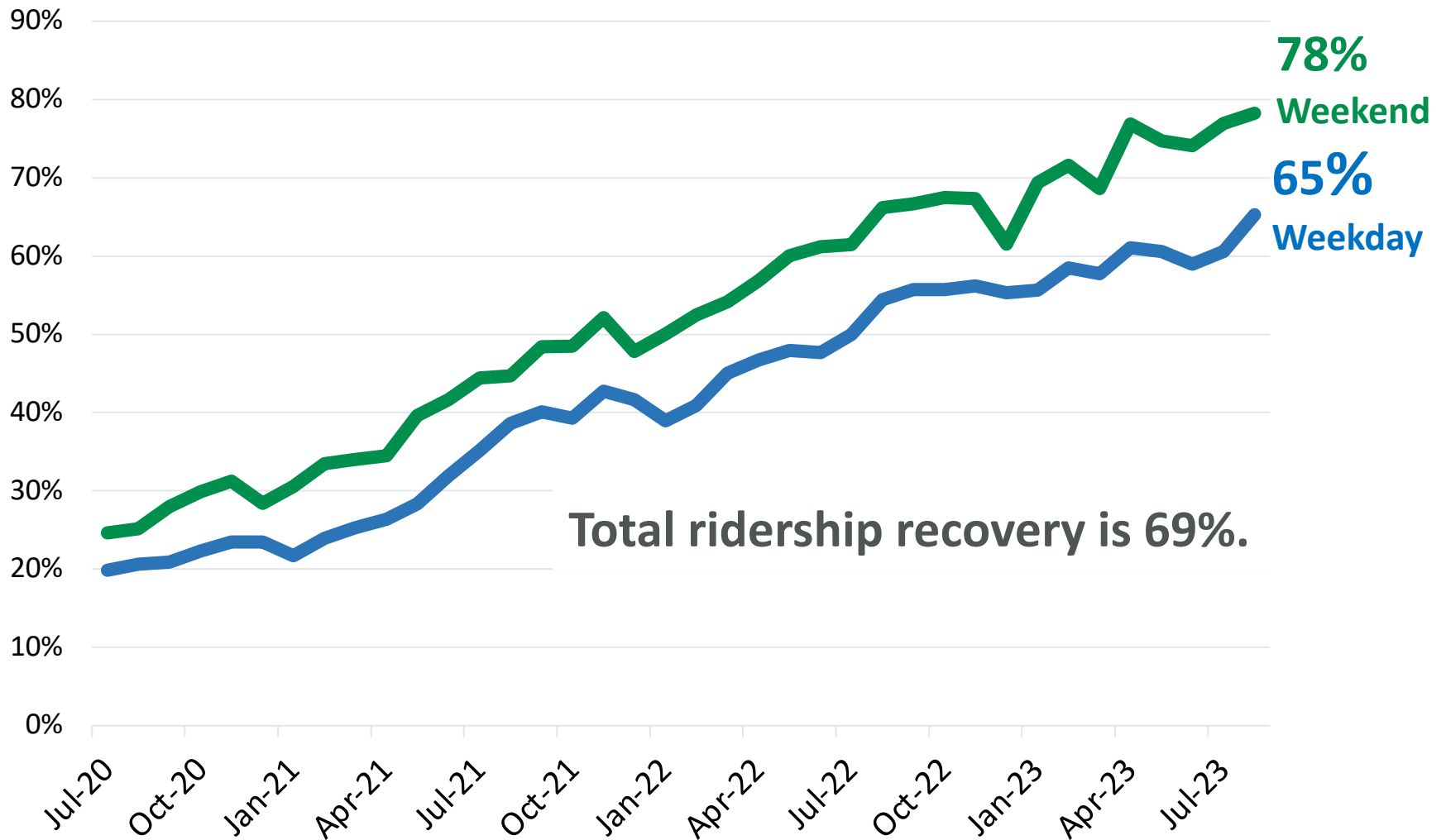
Source: 2023 SFMTA Ridership Survey

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

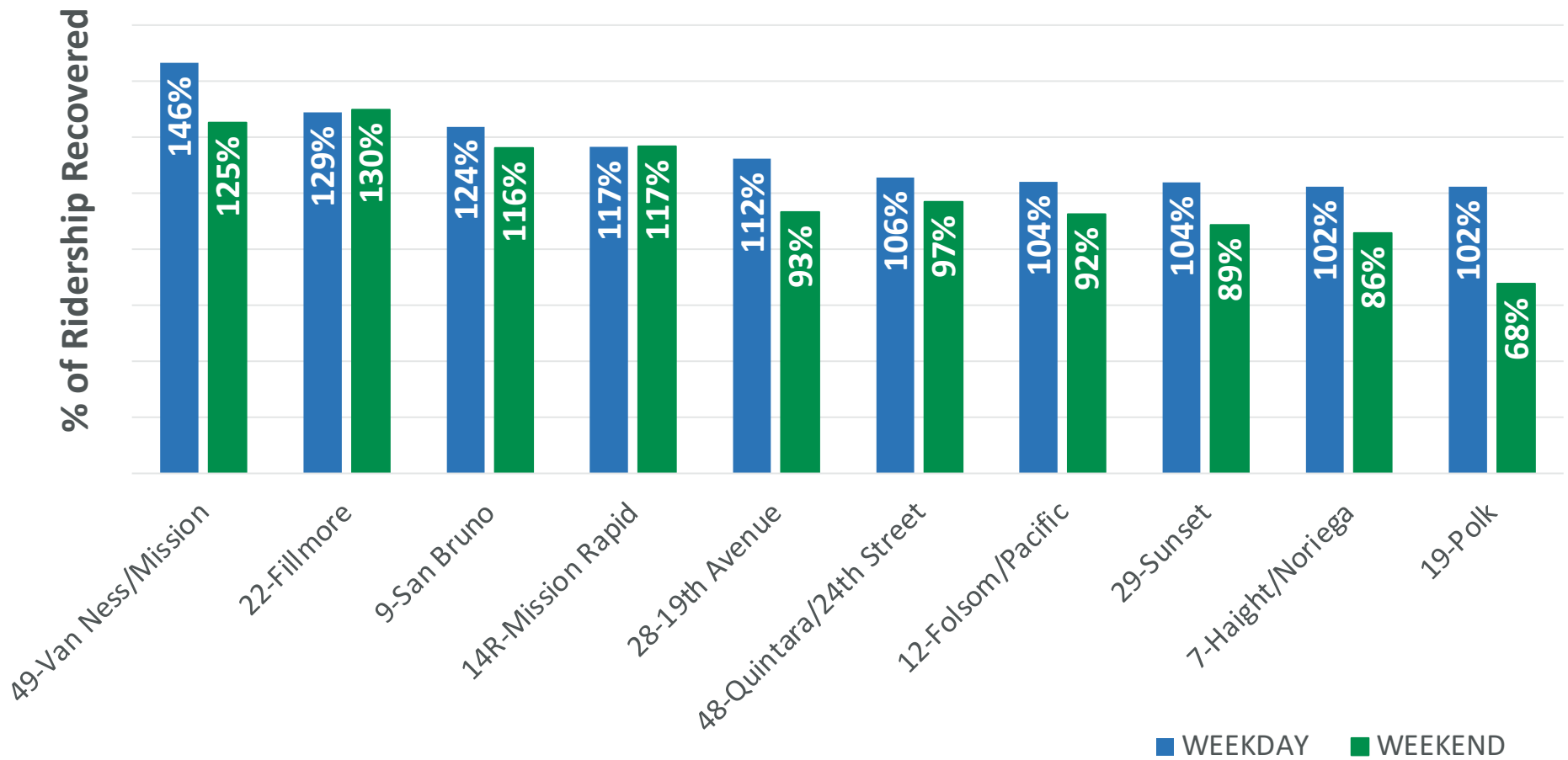
Ridership continues to climb, with September the highest in 4-years.



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	\$ -	\$ -
Remaining Deficit	\$ -	\$ (2)	\$ (12)	\$ (244)	\$ (269)

In millions, figures are SFMTA wide