A Transit Plan for the Future

Service Analysis Findings
Project Overview and Status

- Completed Market Analysis and Service Evaluation.
- Establishing Plan Framework and Guiding Principles.
- Developing Five Year Service Plan and Long Range Plan.

Data Collection & Review
- October 2015 - November 2015

System & Service Evaluation
- November 2015 - May 2016

Five Year Service Plan
- January 2016 - August 2016

Long Range Plan
- February 2016 - August 2016

Final Transit Plan
- September 2016 - December 2016

We are here
Connections2025

Market Analysis
Service Evaluation
Plan Framework
Service Evaluation Components

- **Service Overview** - How has Capital Metro changed over the years?
- **Ridership** - What are the route and network trends; how are people using Capital Metro?
- **Service Effectiveness** - Are routes productive and cost-effective?
- **Service Quality** - Is the service both attracting and retaining customers?
Service Evaluation Goals

- Identify strategies for increasing ridership
  - What are the key attributes for attracting and retaining ridership?
  - What service structure best supports frequent network service?

- Link service to markets
  - What network configuration and mix of transit mobility options can best meet market needs?
  - Market Analysis identified markets for increased transit success as lifestyle (live-work-play), commuter, low-income, seniors in addition to current market
Service Overview

- 81 routes
- 1 rail line
- 1.2 million revenue hours
- 17.2 million revenue miles
- 31.6 million annual boardings
  - Weekday: 114,000
  - Saturday: 56,000
  - Sunday: 40,000
System Overview - Service Share

<table>
<thead>
<tr>
<th>Service</th>
<th>MetroRail 1 Line</th>
<th>MetroRapid 2 Routes</th>
<th>MetroBus 51 Routes</th>
<th>UT Shuttle 12 Routes</th>
<th>MetroExpress 7 Routes</th>
<th>MetroFlyer 9 Routes</th>
<th>MetroAccess</th>
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<tbody>
<tr>
<td>Ridership</td>
<td>2%</td>
<td>9%</td>
<td>64%</td>
<td>20%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Cost</td>
<td>9%</td>
<td>8%</td>
<td>52%</td>
<td>9%</td>
<td>3%</td>
<td>2%</td>
<td>17%</td>
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<tr>
<td>Farebox Revenue</td>
<td>6%</td>
<td>8%</td>
<td>42%</td>
<td>40%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
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Service Trends

- Operating costs have steadily increased with revenue hours stable

Source: National Transit Database
Service Trends

- Operating costs have steadily increased with revenue hours stable
- Ridership has been trending down, especially over the past 5 years

Source: Capital Metro
Service Trends

- Operating costs have steadily increased with revenue hours stable
- Ridership has been trending down especially over the past 5 years
- Productivity has also been trending downward

Source: National Transit Database
System Ridership

- Boarding concentrations are found:
  - Along key mixed-use service spines
  - In areas with dense housing and employment

- Transfers seem balanced between network hubs and route intersections

- Capital Metro’s initial investment in developing a frequent network has been successful
### Weekday Ridership by Route

#### Top 5 bus routes carry over 30% of ridership

<table>
<thead>
<tr>
<th>Route Type</th>
<th>Ridership (Avg.)</th>
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<tbody>
<tr>
<td>MetroRail</td>
<td>5,037</td>
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<tr>
<td>MetroRapid</td>
<td>2,043</td>
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<tr>
<td>MetroBus Local</td>
<td>1,486</td>
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<tr>
<td>UT Shuttle</td>
<td>360</td>
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<tr>
<td>MetroExpress</td>
<td>164</td>
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**MetroAccess**
Service Effectiveness

- Dense mixed-use corridors are the most productive
  - North-South corridors:
    - Lamar
    - Congress
    - Metric
    - Manchaca
  - East-West corridors:
    - Riverside
    - Stassney
    - Oltorf
    - William Cannon
Service Effectiveness

- Least productive segments are on periphery
  - Lower density or discontinuous density
  - No clear destination or connection to frequent network
  - Multiple deviations
Service Quality

- **Service Reliability**
  - On-Time Performance goal met on MetroRail and Local service
  - Other services are close to OTP goals
  - Operating speeds have remained consistent over time

- **Service Availability**
  - No major capacity issues observed
  - Some trips standing room only during peaks, still meet existing standards
Financial Performance

- Farebox Recovery very low at 10%
- UT routes have direct fare revenue from the University and require lower subsidies
- Specialized services (night, senior shuttles) are highly subsidized

Weekday Average Subsidy per Passenger

- UT Shuttle: $0.00
- Local: $(10.00)
- MetroRapid: $(20.00)
- MetroExpress: $(30.00)
- MetroFlyer: $(40.00)
- MetroRail: $(50.00)
- MetroAccess: $(60.00)
Fares

- Historic base fares have been low
- Daily and Monthly Passes are priced at lower multiples than typical practice
  - Daily pass set at one round trip; 2.5 to 3 is typical
  - Monthly pass set at 33 one-way fares; typical is high 30’s to low 40’s
- Tiered fare structure incentivizes people to use local services
  - No ability to upgrade fare
  - Results in lower MetroRapid ridership

<table>
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<tr>
<th>Year</th>
<th>Local</th>
<th>Premium</th>
<th>Commuter</th>
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<td>1985</td>
<td>$0.50</td>
<td>-</td>
<td>$1.00</td>
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<tr>
<td>1990</td>
<td>Free</td>
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<td>2010</td>
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<tr>
<td>2014</td>
<td>$1.00</td>
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<td>$2.75</td>
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<tr>
<td>2015</td>
<td>$1.25</td>
<td>$1.75</td>
<td>$3.50</td>
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MetroRapid Challenges

- MetroRapid operates just 10-15% faster than local
  - Typical BRT 20-30% faster
MetroRapid Challenges

- **MetroRapid fare is 40% higher than local**
  - UT Students proportionally use MetroRapid more; no fare difference
  - Price pushing customers to local service
  - MetroRapid service is 36% less expensive per seat mile for Capital Metro to operate
MetroRapid Challenges

- MetroRapid needs to be much more successful
  - Attract more customers from the dense mixed-use corridors
  - Serve effectively as the key spines of the frequent network
Service Strengths

- EXISTING FREQUENT NETWORK
- TAILORED SERVICES
- MIXED USE CORRIDORS
- FACILITIES
Service Weaknesses

- LIMITED FREQUENT SERVICE
- LOW FAREBOX RECOVERY
- FARE STRUCTURE
- LIMITED NETWORK SYNERGY
Service Strategies

- Build a more extensive and stronger frequent network
  - Growing long term ridership focuses on network use, not just route use

- Concentrate on key customer experience attributes
  - Attractors - network frequency and fast travel (influence ratio 3:1)
  - Retention - network reliability

- Match network configuration and service options to target markets

- Support innovative mobility initiatives

- Improve service effectiveness and efficiency
Next Steps - Upcoming Board Interactions

June
- Framework and Recommendation Strategies

August
- Draft Transit Plan

October
- Public Outreach Feedback

November
- Final Transit Plan