Growing Bus Ridership in the 21st Century

Board of Directors Study Session
October 11, 2016

• Ridership peaked in 1981 (80,000 AWR)
• County’s population
  – 587,329 then
  – 765,000 in 2015
• Since 1981
  – Population up 30%
  – Traffic volumes up 31%
  – Ridership down 48%
What Not to Do

- Pretend it’s 1981
- Focus on choice riders
- Abandon core demographic
- Assume we can plan our way out of fiscal crisis

Key Challenge

Execute core mission with fiscal challenges in mind
Travel Markets

- By geography
- By demographic
  - Youth
  - Seniors
  - Adults
- By type
  - Long distance
  - Community vs. commuter

Ridership Initiatives

- Youth Mobility Plan
- Senior Mobility Plan
- El Camino Real Rapid Bus
- US-101 Express Buses
- Coastside Express Buses
- Other markets
  - SFO
  - Dumbarton corridor
Focus on Youth Market

- Last decade, driving down 23% to 7,900 miles/year (16-24)
- From 2001-2009, those in households with $70,000+ annual income increased use of public transit by 100%
- Concerns
  - Bell times during peak hours
  - 51% lower fare than adults

Focus on Senior Market

What Community Amenities Do Older Adults Want Close to Home?

<table>
<thead>
<tr>
<th>Amenity</th>
<th>% within 1 mile or less</th>
</tr>
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<tbody>
<tr>
<td>Bus Stop</td>
<td>50%</td>
</tr>
<tr>
<td>Grocery Store</td>
<td>47%</td>
</tr>
<tr>
<td>Park</td>
<td>42%</td>
</tr>
<tr>
<td>Pharmacy/Dog store</td>
<td>42%</td>
</tr>
<tr>
<td>Hospital</td>
<td>29%</td>
</tr>
<tr>
<td>Church/Religious</td>
<td>29%</td>
</tr>
<tr>
<td>Train/Subway</td>
<td>23%</td>
</tr>
<tr>
<td>Big Box Store</td>
<td>18%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>16%</td>
</tr>
<tr>
<td>Mall/shopping</td>
<td>13%</td>
</tr>
</tbody>
</table>

Source: AARP Public Policy Institute

Graphic: AARP Design
El Camino Real Rapid Bus

• **Impact of Overlay Rapid**
  - Ridership grows 19-34%
  - Operating costs up 34-59%

• **Impact of Hybrid Route**
  - Ridership up 6-35%
  - Operating costs up 8-51%
  - Capital costs potentially minimal

US-101 Express Buses

• **Issues**
  - Carpool or managed lanes critical
  - Park-n-ride lots needed
  - Operating costs substantial

• **Key policy questions**
  - Increase service to SF, Santa Clara counties?
  - Premium fares?
  - Who operates service?
Coastside Express Buses

• Connect to Daly City and Colma BART?
• What about Routes 110, 112, 118, 120?

Other Opportunities

• SFO Airporter
  - Last mile between Millbrae and SFO
  - Poorly served from the south
  - Substantial employee market

• Dumbarton Corridor
  - SamTrans-owned right-of-way
  - Potential Bus Rapid Transit and/or rail service
Next Steps

- Work with Board through Strategic Vision process to redefine public bus transit for the 21st century