

Status Report on Regional Transit Service Performance



April 13, 2006

Board of Directors

Transportation Committee

GGT Regional Transit Service Overview

- Bus ridership trends vary by type of service (commute bus vs. basic bus vs. ferry) and by geographic area
- Annual fare increases have resulted in a 1-2% annual loss in riders
- 2003 GGT Regional Service Reductions resulted in a 17% loss in annual regional bus ridership. Regional bus ridership has been declining over time; about 44% fewer regional bus riders in 2002 than in 1980.
- Lower number of Marin County daily work trips by all modes being made to San Francisco
- Increase in work trips to San Francisco from Sonoma areas served by GGT
 - Fewer areas in Sonoma Co. have direct access to GGT service
- Reverse commute opportunities on bus are limited due to geographic dispersal of jobs
- Ferry service has shown ongoing increases in peak ridership and peak departures and parking at the Larkspur Ferry Terminal are at capacity

Data Sources

- 1990 and 2000 Journey to Work Census Data for all work trips to San Francisco
- 2000 and 2005 GGB Traffic Volumes (down 8%)
- October 2004-2005 GFI/TranStat bus ridership counts
- October 2004-2005 Ferry Passenger Trip Logs

Types of GGT Regional Bus Services

- **Commute Routes**

Routes 2/4/8/18/24/26/27/38/44/54/56/58/72/72X/73/74/76

- Weekday-only peak period express service
- Limited pick-up points
- Operate long distances non-stop via freeway
- Fast travel times

- **Basic Routes (Routes 10/70/80)**

- Provide all-day, seven-day-a-week service for mobility needs
- Many stops
- Slower travel times

- **Sonoma-Marín Services (Routes 75 and 80)**

- One weekday peak commute route (Route 75)
- Basic Route 80 service

- **Other services not covered in this presentation**

- Richmond Bridge Routes 40/42
- Special services: Route 93 Commute shuttle, Route 97 Larkspur Ferry
- Local Marin service

Commuter Bus Ridership Trends

San Francisco Commute Pattern Shift

Strongest Commute Markets have Traditionally Been in Areas Closer to San Francisco

- Marin-to-San Francisco Work Trips by all modes **declined** 1990-2000 (by 6% or 1867 persons per day)
- Sonoma-to-San Francisco Work Trips by all modes **increased** during same period (by 53% or 1760 persons per day)
- Estimated number of 2005 work trips to San Francisco by adjusting 2000 numbers to reflect economic downturn
- Commute bus ridership trends vary by community within both counties
 - Direct express service from Park & Ride lots has maintained or increased ridership in some areas
 - Some commute routes that collect passengers in residential areas have declined



Golden Gate Transit

Southern Marin Commute Service

Routes 2/4/8

Southern Marin

Traditionally High Orientation to San Francisco

- **Sausalito/Marin City (GGT Route 2 and Sausalito Ferry)**
 - Number of San Francisco work trips unchanged 1990-2000
 - About 5% of SF work trip market uses Rte 2 commute bus (132 riders/day)
 - About 9% of SF work trips on ferry (250 riders)
 - Number of commute bus passengers has declined about 20 per day (-6.5%) since October 2004
 - Sausalito will continue to have strong ties to San Francisco
 - Transit ridership could be increased
- **Mill Valley (GGT Route 4)**
 - San Francisco work trips grew by 113 trips per day between 1990-2000
 - About 12% of SF work trip market uses Rte 4 commute bus (636 riders per day)
 - Number of commute bus passengers flat since Oct 2004
 - Factors that make this a strong route with growth potential
 - Manzanita Park & Ride
 - Frequent service

Southern Marin (continued)

Historically Oriented to San Francisco for Work Trips but Population is Aging

- **Tiburon/Strawberry**

- **(GGT Routes 8, 9; Blue & Gold Ferry)**

- Number of San Francisco work trips declined by 400 riders per day between 1990-2000
- About 3.6% of SF work trip market on Rte 8 commute bus (87 riders per day)
- About 1% of SF work trips on commute shuttle Rte 9 (20 riders per day)
- About 12% of SF work trips on Blue & Gold Ferry (340 peak riders day)
- Number of commute bus passengers has declined about 30 per day (-25.7%) since October 2004
- Declining 18-64 age group due to aging population
- Transit market will not grow

Central Marin

Strong Orientation to San Francisco for Work Trips

- **Larkspur/Corte Madera (GGT Route 18)**
 - Number of San Francisco work trips unchanged 1990-2000
 - About 7.5% of SF work trip market on commute bus (190 riders)
 - Number of Commute bus passengers has declined about 20 per day (-4.8%) since October 2004
 - Larkspur Ferry also draws SF work trips from this area

Central Marin (continued)

Strong Orientation to San Francisco for Work Trips

- **Fairfax/San Anselmo/Sleepy Hollow/Greenbrae (GGT Routes 24 and 26)**
 - Number of San Francisco work trips declined by about 400 riders per day between 1990-2000
 - About a 14% decrease to 424 commute bus riders per day
 - About 15 per day (-1.5%) since October 2004 on Route 24
 - 66 per day (-24.8%) on Route 26
 - Approximately 10% of SF work trip market is on commute bus
 - Larkspur Ferry also draws SF work trips from this area
 - Much of this market is stable

Central Marin (continued)

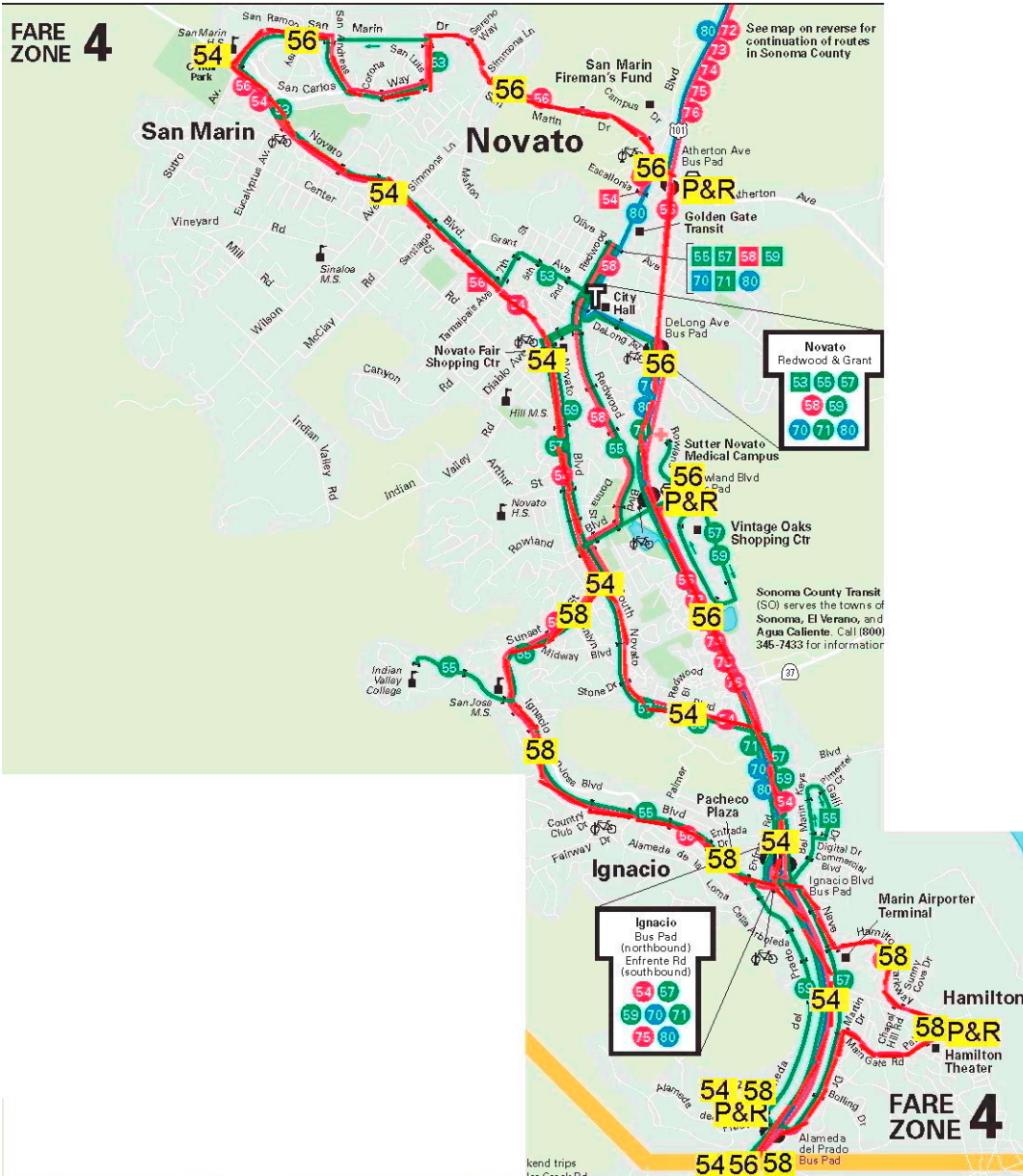
Strong Orientation to San Francisco for Work Trips

- **San Rafael (GGT Routes 27 and 44)**
 - Number of San Francisco work trips declined by about 260 between 1990-2000
 - About 10% of SF work trip market on commute bus (290 riders per day)
 - Number of commute bus passengers has **increased** about 35 per day (+17.1%) since October 2004
 - Factors Influencing Ridership Patterns:
 - Lucas Arts' move to the Presidio a factor in this increase
 - Larkspur Ferry also draws SF work trips from this area

North Central Marin

Less Orientation to San Francisco

- **Terra Linda/Lucas Valley (GGT Routes 38 and 44)**
 - Number of daily San Francisco work trips remained steady between 1990-2000
 - About 5% of SF work trip market on commute bus (181 riders per day)
 - Number of commute bus passengers declined about 21 per day (-5.5%) since October 2004
 - Modest Park & Ride Opportunities
 - San Rafael (Route 44 only)
 - Smith Ranch Park & Ride
 - Informal: Near Bus Pads
 - Market appears to be stable
 - Larkspur Ferry also draws SF work trips from this area



Golden Gate Transit

Novato Commute Service Routes 54/56/58

Northern Marin (Novato)

Changing Market in its Orientation to San Francisco

- **Novato/Ignacio/Hamilton** (GGT Routes 54, 56 and 58)
 - Number of daily San Francisco work trips declined by about 750 per day between 1990-2000
 - Commute bus ridership up over 100 riders per day (+6%) since October 2004
 - About 16% of SF work trip market on commute bus (650 riders)
 - Factors:
 - New residential development not reflected in 2000 census (Hamilton, Pointe Marin, and others)
 - Park & Ride Opportunities
 - Frequent Service



Golden Gate Transit

Sonoma County Commuter Service Routes 72/72X/73/74/76

Southern Sonoma County

Increased Number of Work Trips to San Francisco Along With New Residential Developments

- **East Petaluma (GGT Route 76)**

- Number of San Francisco work trips increased by 747 per day between 1990 and 2000
- Commute Bus Ridership decreased 55 riders per day (-12%) from October 2004
- About 7% of the SF work trip market on commute bus (107 riders)

- **Central/West Petaluma (GGT Routes 73 and 74)**

- San Francisco work trips increased by 362 per day between 1990 and 2000
- Commute Bus Ridership about the same compared to October 2004
- About 18% of the SF work trip market on commute bus (210 riders per day)

Santa Rosa/Rohnert Park

Traditionally Smaller But Growing Number of Work Trips to San Francisco

- **Santa Rosa/Rohnert Park/Cotati**
(GGT Routes 72/72X & 73)
 - San Francisco work trips increased by almost 1800 per day between 1990 and 2000
 - Commute bus ridership down 75 riders per day (-8%) from October 2004
 - About 19% of the SF work trip market on commute bus (450 riders per day)
 - Route 72X riders increased by 6% during this period
 - Factors:
 - New housing development not reflected in 2000 census
 - Park & Ride Opportunities
 - Frequent Service

Commute Bus Service Performance

Commute Bus Ridership

Top Performing Routes Carry Large Numbers of Passengers Each Day

	<u>Daily Pass.</u>	<u>Average Pass/Trip</u>	<u>Number of Bus Trips</u>	<u>% of trips Carrying >37</u>
Route 4	1317	36	39	67%
Route 24	1017	33	29	20%
Route 54	844	23	22	38%
Route 72/72X	772	31/37 ¹	19/5 ¹	45%
Route 56	340	30	12	25%
Route 38	277	31	9	12%

¹ Route 72X operates five weekday trips and averages 37 passengers per trip

Least Performing Carry Much Lower Numbers of Passengers Each Day

	<u>Daily Pass.</u>	<u>Average Pass/Trip</u>	<u>Number of Bus Trips</u>	<u>% of trips Carrying >37</u>
Route 8	91	18	5	0%
Route 9	55	9	5	0%
Route 58	117	23	5	0%
Route 76	213	28	14	0%

Performance Summary of Commute Trips

Commute Services Are Very Efficient

*Number of trips carrying below 20 passengers
October-November 2005*

• Route 2	0	• Route 44	1
• Route 4	0	• Route 54	0
• Route 8	5	• Route 56	1
• Route 18	1	• Route 58	1
• Route 24	0	• Route 72/72X	1
• Route 26	1	• Route 73	1
• Route 27	2	• Route 74	2
• Route 38	0	• Route 76	2

Schedules are adjusted quarterly based on the following factors:

- *Deficit Reduction (Cost Reduction-Revenue Loss)*
- *Alternative Service*
- *Ridership Trends over Time*

Commute Bus Route Performance

Top Performing Commute Routes with Farebox Recoveries Higher than the System Average of 22%

Route 72X (Santa Rosa/Rohnert Pk Exp):	55.1%
Route 54 (Novato/San Marin):	35.5%
Route 74 (Central/West Petaluma):	35.0%
Route 72 (Santa Rosa/Rohnert Pk/Cotati):	31.3%
Route 56 (Novato/Rowland Park & Ride):	29.9%
Route 38 (Terra Linda):	26.4%
Route 4 (Mill Valley):	26.8%

Least Performing Routes with Low Farebox Recoveries:

Route 8 (Tiburon):	15%
Route 76 (E. Petaluma):	16.4%

Commute Bus Route Performance

Deficit per Passenger Reflects the Contrast in Performance

- **Top performers:**

Route 72X(Santa Rosa/Rohnert Park Exp) \$ 4.50

Route 54(Novato/San Marin) \$ 6.31

Route 4(Mill Valley/Manzanita Park & Ride)\$ 6.80

Route 38(Terra Linda) \$ 8.39

Route 56(Novato/Rowland Park & Ride) \$ 8.49

Route 74(Central/West Petaluma) \$ 9.56

Route 72(Santa Rosa/Rohnert Pk/Cotati) \$11.48

- **Lowest performers:**

Route 8(Tiburon) \$15.14

Route 76(East Petaluma) \$14.50

Basic Bus Service Ridership and Performance

Regional Basic Bus Ridership

Routes 10, 70 and 80

Basic Routes Less Oriented Toward SF Work Trips

- **Seven-day-a-week, all-day Service Provides Basic Mobility**
 - Local Marin ridership an important component of these routes
 - These routes generally not used by commute bus riders
 - Off-peak service offered
 - Provides for leisure and incidental travel
 - Ridership is low during some midday, evening and weekend times
 - Opportunities for some reverse commuting, particularly to/from Sausalito
- **Compared to 2004, Overall Ridership is Down**
 - Marin-SF ridership on Route 10 is unchanged
 - Marin-SF ridership on Rtes 70 and 80 is down 67 trips per day (-4%)
 - Sonoma-SF ridership has increased by 50 trips per day (9%)
- **Staff has identified low-ridership trips that could be subject to efficiency adjustments**

Regional Basic Bus Performance

Performance Varies Among Basic Bus Routes

- **Route 10** (Marin City/Sausalito to Geary Blvd/SF Civic Ctr)
 - Has a lower number of average passengers per trip (22 per trip)
 - Farebox Recovery below system average (18.4%)
 - Deficit Per Passenger is \$8.64

- **Routes 70 and 80** (Santa Rosa/Novato/San Rafael/Marin City to Van Ness Ave/SF Civic Center/1st & Mission Sts.)
 - High number of average passengers per trip due to turnover along both routes
 - Route 70: 58 passengers per trip
 - Route 80: 69 passengers per trip
 - Farebox Recoveries above system average
 - Route 70: 27.0%
 - Route 80: 25.8%
 - Deficit Per Passenger is Low
 - Route 70: \$5.14
 - Route 80: \$6.94

Sonoma-Marin Travel

*Commute Route 75 and Basic Route 80 Serve this Market
Sonoma to Marin Travel is Higher than Marin to Sonoma*

- **Census Data from 1990 and 2000 shows:**
 - A growing Sonoma to Marin travel market increasing from 6,400 to 13,900 daily work trips
 - Marin to Sonoma travel remains much lower
 - Little change from 1990 to 2000 (approximately 3,000 work trips per day)
 - Reverse commute opportunities limited due to geographic dispersal of jobs and lower level of transit connections to those jobs
- **Since last year:**
 - Route 75 commute ridership has remained flat
 - Route 80 ridership in this market has grown by a modest amount (5% or about 24 daily trips)

Route 75 Route Performance

*Route 75 Serves a Unique Market in the System
and Receives Outside Subsidies*

- Averages 27 passengers per trip
- 16.4% Farebox Recovery
- Subsidies from Marin County and Regional Express Bus Program/Regional Measure 2 Funds Offset Deficit per Passenger of \$14.50

Summary of Regional Bus Trends

- **Past Changes**

- Traditional GGT regional bus travel markets have changed
- Marin has fewer work trips going to San Francisco
- Sonoma market has more work trips to San Francisco

- **Current Conditions**

- Travel in 2005 is down about 8% from 2000 levels
- GGT Commute Bus services are very efficient
- Some routes do better than others due to localized growth or one-time employment shifts
- Basic routes need further investigation
 - General decline in ridership
 - Some trips do not carry many riders
 - Marin local travel increasing
- Transit ridership growth will need to come from greater market share of declining overall travel market

Ferry Service Ridership Trends

Ferry Trends

Between October 2004 and October 2005

- Sausalito Peak Service increased 29% (179 new trips or 90 daily riders) to 790 daily peak riders
- Larkspur Peak Service increased nearly 6% (207 new trips or 103 daily riders) to 3,675 daily peak riders
- Larkspur parking lot now full in a.m. peak

Challenges and Opportunities

- Continue to monitor ridership trends and refine data
- Identify ways to get a greater share of the travel market
- Identify low-cost opportunities to improve service
- Potentially move service from less productive areas to more productive ones
- Increase Park & Ride opportunities for bus and ferry
- Obtain better information on our riders and non-riders in these different markets
 - Find out places of residence, mode choices, origins/ destinations and times of trips
 - Determine awareness of GGT service among non-riders and likelihood of their using our service