The National Transit Adaptation Strategy

In a post COVID-19 world, how can transit agencies acquire new and lapsed riders and become more resilient?

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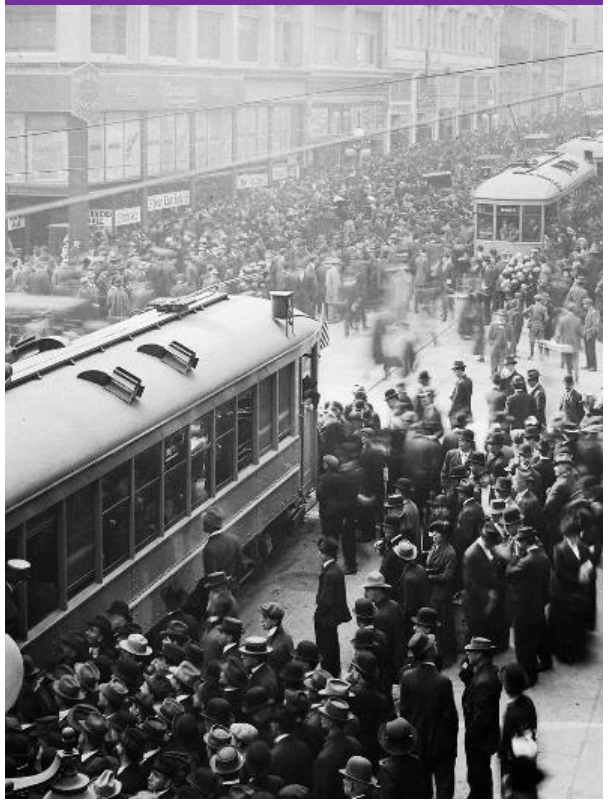
Who are we?

The San Francisco Municipal Transportation Agency

SFMTA is Unique in the United States

1912: Voters establish the Municipal Railway (Muni)



1999: Voters merge Muni and the Department of Parking and Traffic

2007: Voters add the Taxi Commission to the SFMTA

SFMTA **Overview**

847 Buses

196 LRVs

42 Cable Cars

2,500 Muni Operators

154K Paratransit Trips

165 Crossing Guards

42 mi. of Bike Lanes

2.3M Taxi Trips

11K+ Bike Racks

1286 Traffic Signals

32 mi. of Slow Streets

75 mi. of Transit Lanes

Project Framework

The National Transit Adaptation Strategy

Basic **Scope**

The National Transit Adaptation Strategy is a **strategic playbook** that provides **tools** to **build resilient public transportation** systems.

Deliverables include:

- A future scenarios report
- Rider personas and journey maps
- A ridership projection model
- A digital and print marketing campaign to drive confidence and ridership

Project **Partners**

Federal Transit Administration

Massachusetts Institute of Technology

SFMTA

IFTF
Institute for the Future

MIG

transit

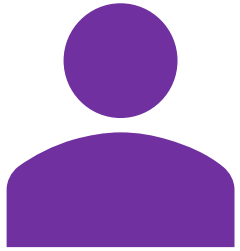
CIVIC EDGE CONSULTING

IDEO

Clear Channel Outdoor

Intersection

SFMTA **Project Team**



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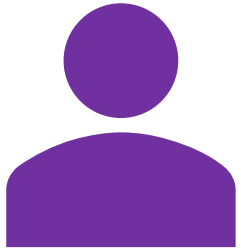
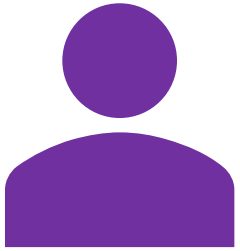
- Chief Strategy Officer, SFMTA
- NTAS Project Executive

Darton Ito
- Section Director, Design Strategy & Delivery, SFMTA
- NTAS Project Manager



Jeanne Brophy
- Communications Manager, SFMTA
- NTAS Marketing Campaign Manager



Andy Gagliardi
- Jr. Administrative Analyst, SFMTA
- NTAS Project Administrator

Understanding the ***big problem***

It’s time for American Public Transit Systems to consider *change*

The **Problem**

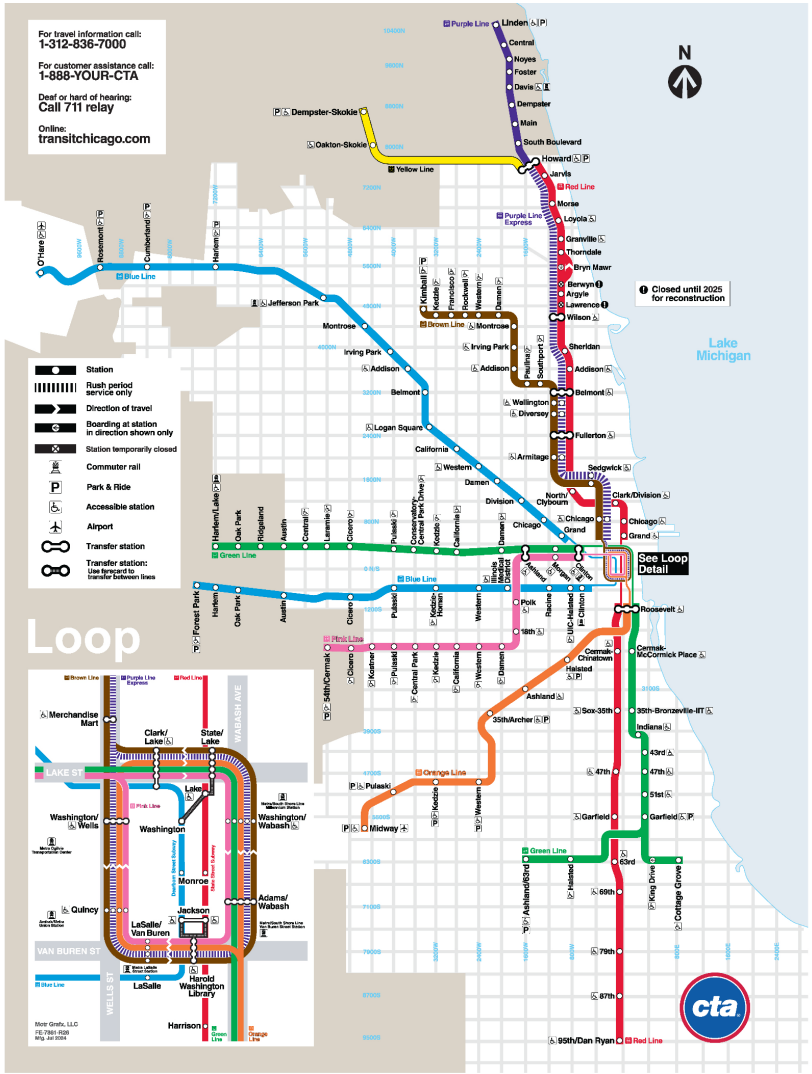
Transit Agencies in the USA face a **financially uncertain future**, **threatening** the very **existence** of **public transportation** in the United States.

Problem Areas:

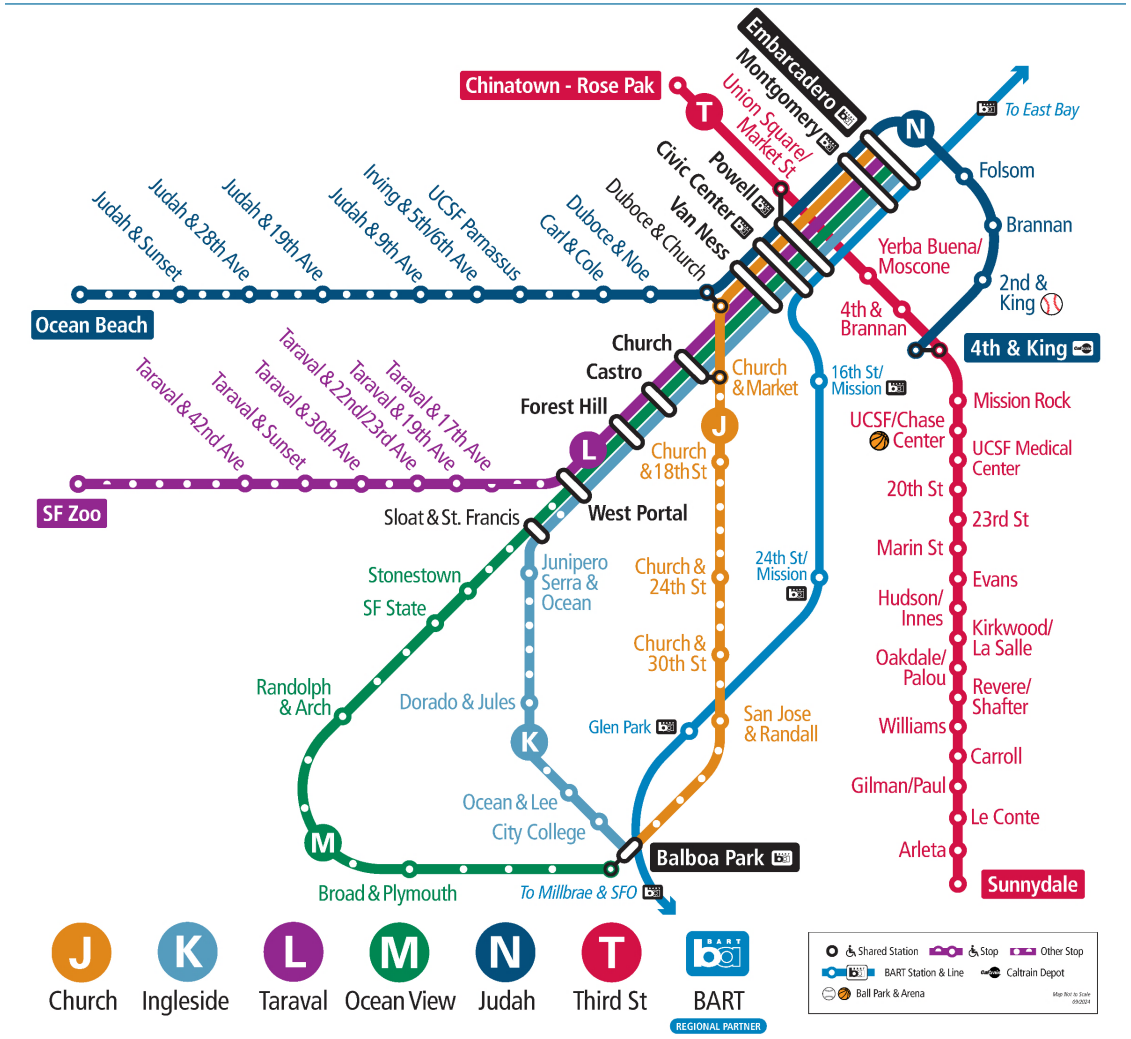
1. Geographic realities of American cities
2. Declining demand for peak job-center focused travel
3. Agencies' focus primarily on existing riders and not ridership growth

1. Geographic realities of American cities

CTA ‘L’ System Map



SFMTA Muni Metro System Map



1. Geographic realities of American cities

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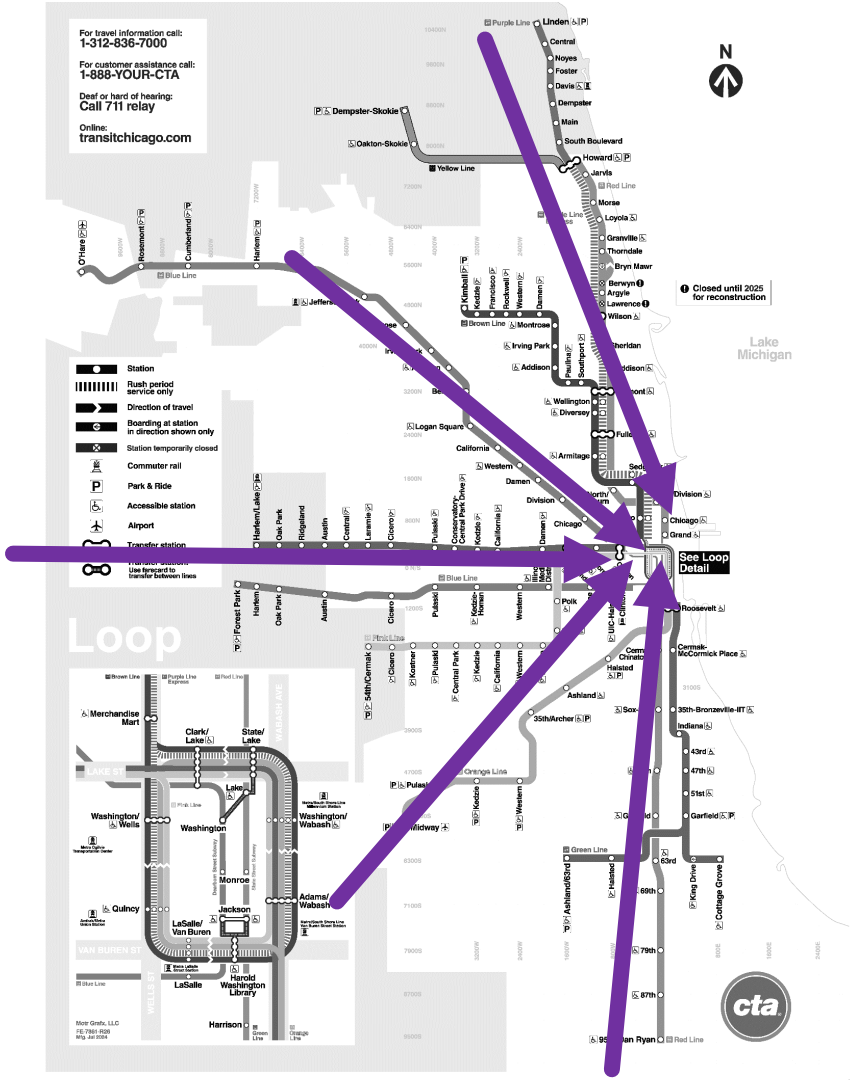
For travel information call:
1-312-836-7000
For customer assistance call:
1-888-YOUR-CTA
Deaf or hard of hearing:
Call 711 relay
Online:
transitchicago.com
Station
Rush period service only
Direction of travel
Boarding at station in direction shown only
Station temporarily closed
Commuter rail
Park & Ride
Accessible station
Airport
Transfer station
Use fareard to transfer between lines
Closed until 2025 for reconstruction
See Loop Detail
Loop
Lake Michigan
Purple Line
Yellow Line
Red Line
Blue Line
Brown Line
Green Line
Orange Line
Pink Line
Linden
Central
Noyes
Foster
Davis
Dempster
Main
South Boulevard
Howard
Jarvis
Morse
Loyola
Granville
Thorndale
Bryn Mawr
Berwyn
Argyle
Lawrence
Wilson
Sheridan
Addison
Wellington
Diversey
Fullerton
Belmont
Logan Square
California
Western
Damen
Division
Chicago
Grand
Roosevelt
Polk
Cermak-McCormick Place
Halsted
Ashland
35th-Bronzeville-IIT
Indiana
43rd
47th
51st
Garfield
63rd
69th
79th
87th
95th/Dan Ryan
King Drive
Cottage Grove
Ashland/63rd
35th/Archer
Midway
Pulaski
Kostner
Central Park
Kedzie
Homan
Keeler
Kedvale
Cicero
54th/Cermak
Forest Park
Harlem
Oak Park
Ridgeland
Austin
Central
Laramie
Cicero
Pulaski
Conservatory-Central Park Drive
Kedzie
California
Damen
Western
Merchandise Mart
Clark/Lake
State/Lake
Lake
Washington
Washington/Wells
Washington/Wabash
Monroe
Adams/Wabash
Jackson
LaSalle/Van Buren
LaSalle
Harold Washington Library
Quincy
Harrison
Roosevelt
Cermak-McCormick Place
Halsted
Ashland
35th-Bronzeville-IIT
Indiana
43rd
47th
51st
Garfield
63rd
69th
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Damen
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Chicago
Grand
Roosevelt
Polk

1. Geographic realities of American cities

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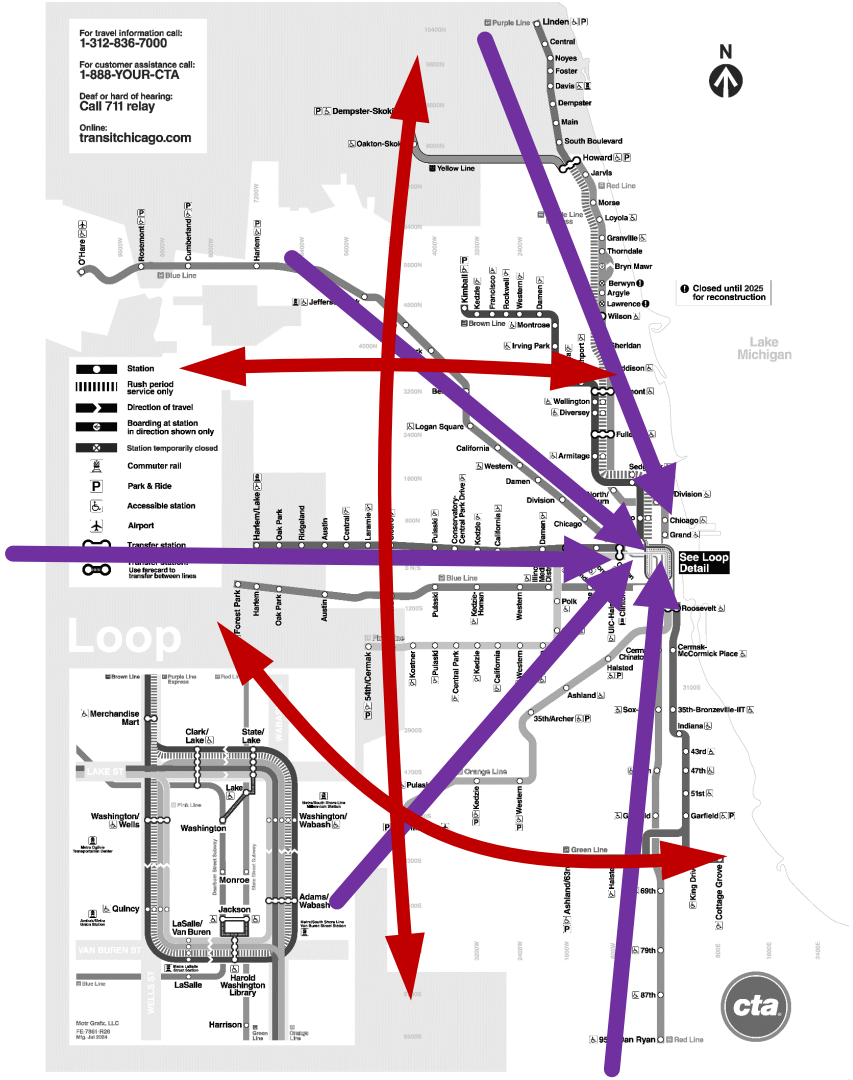

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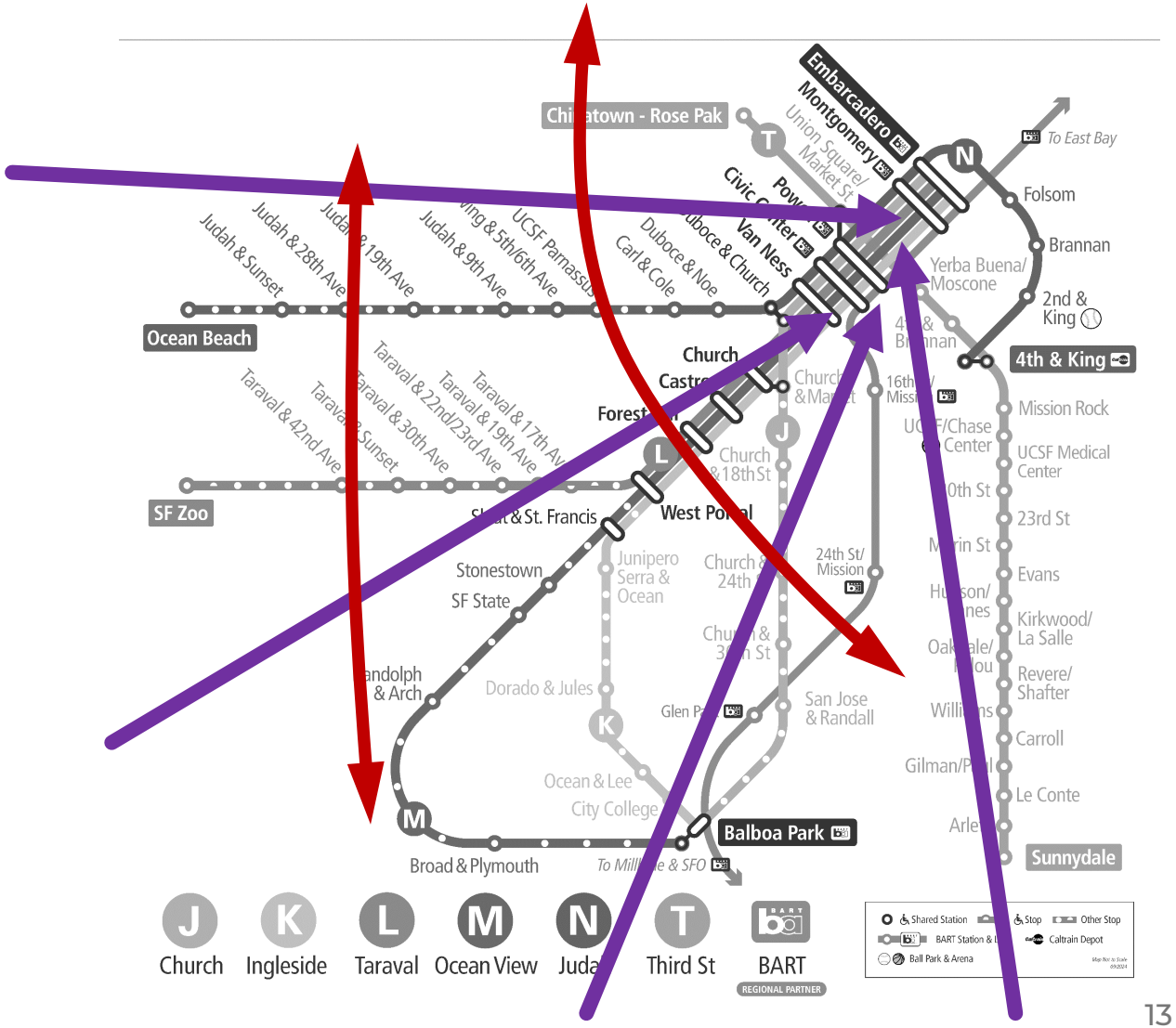
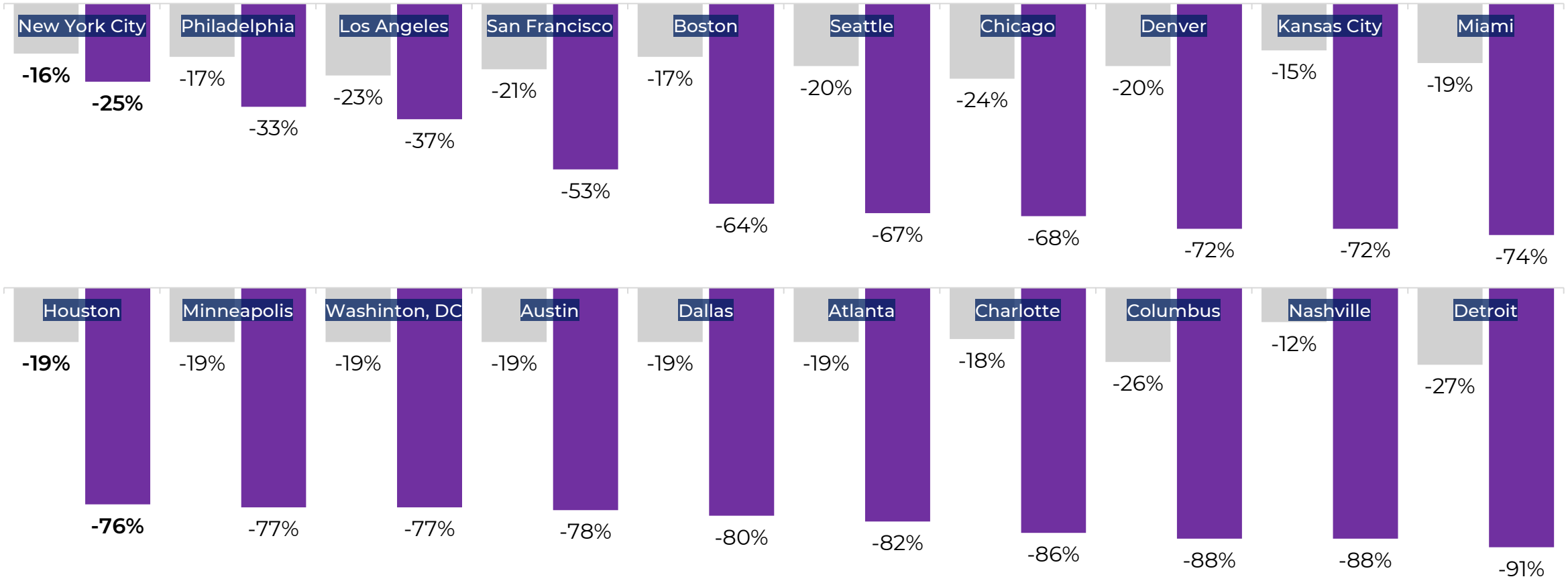


2. Declining demand for peak job-center focused travel



Percent change in 2022 from 2019 in the number of commutes taken on a typical autumn Thursday by either car or on public transit.

Source: Replica, via The New York Times, https://www.nytimes.com/interactive/2023/11/06/business/economy/commuting-change-covid.html

3. Agencies' focus primarily on existing riders

Who is transit for?

3. Agencies' focus primarily on existing riders

Can transit be for **everyone?**

How can transit agencies solve these problems?

The National Transit Adaptation Strategy

Our **focus** should be **on** acquiring **new** and **lapsed riders**

How can we do this?

Answer these questions:

1. Who **rides**?
2. Who **doesn't** that **could**?

Phase I

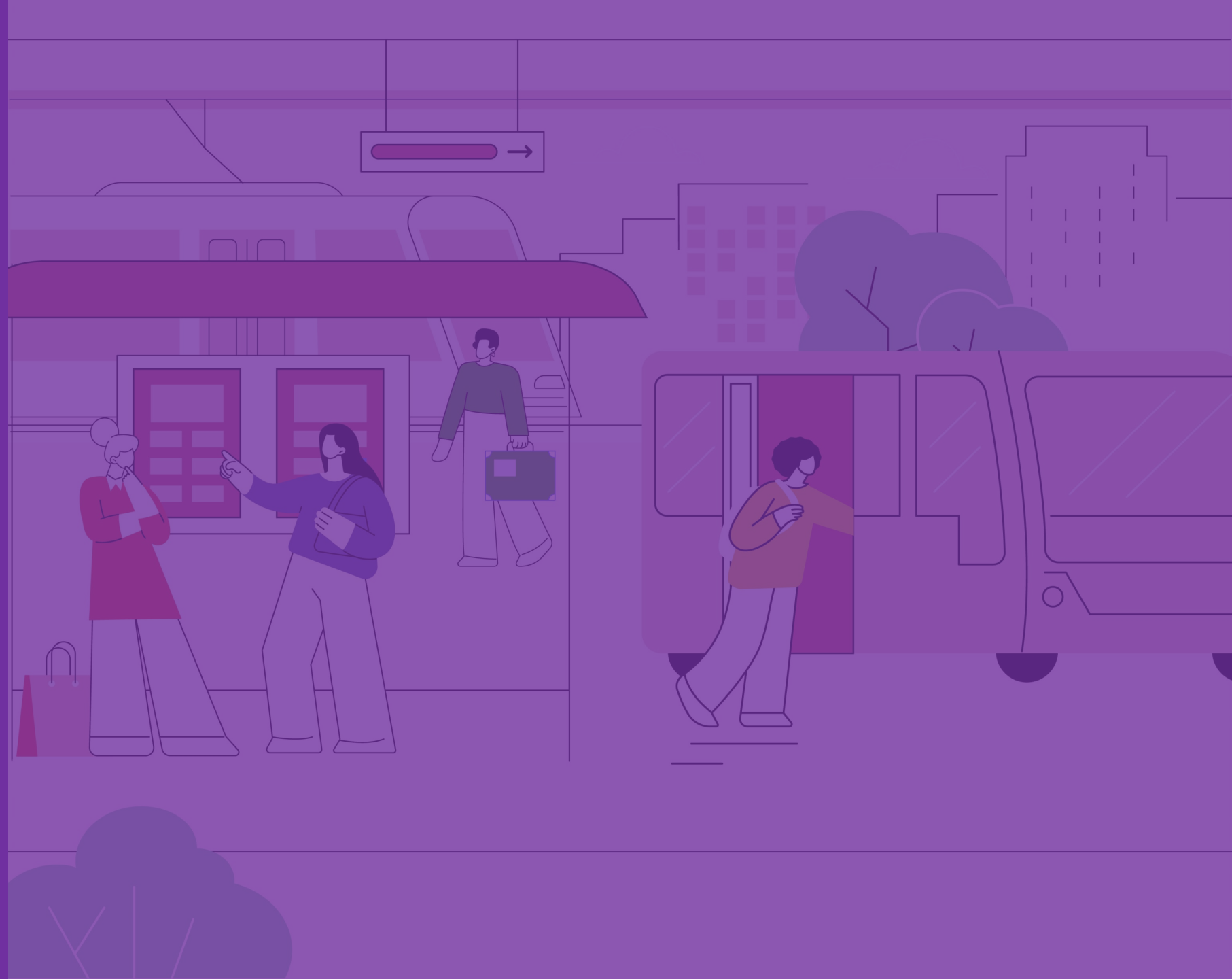
Future Scenarios

What *kinds of* ***futures*** *might we* ***expect*** *and* ***anticipate?***

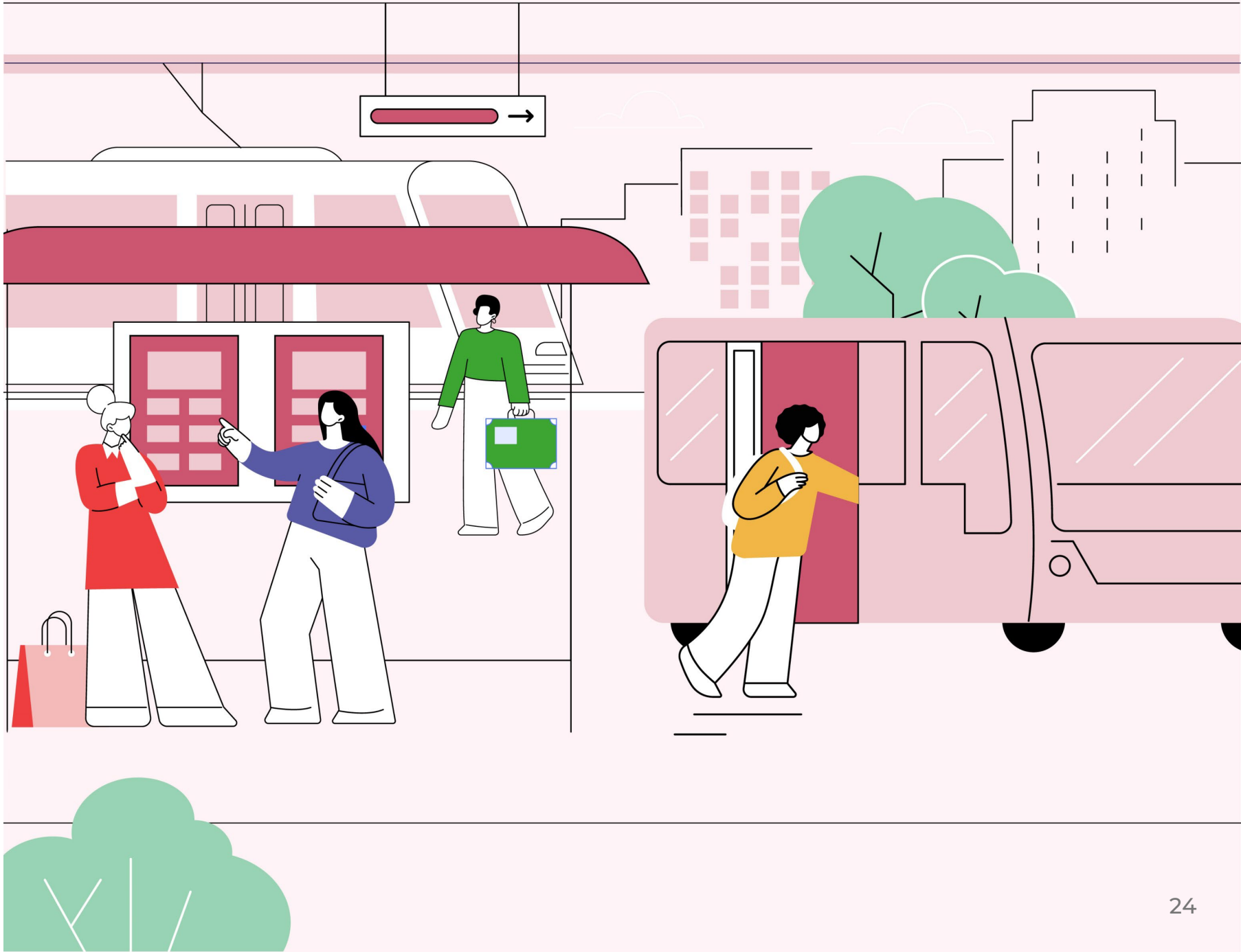
Future **Scenarios**

Phase II

Rider Personas



Who is riding and who is not ***riding?***

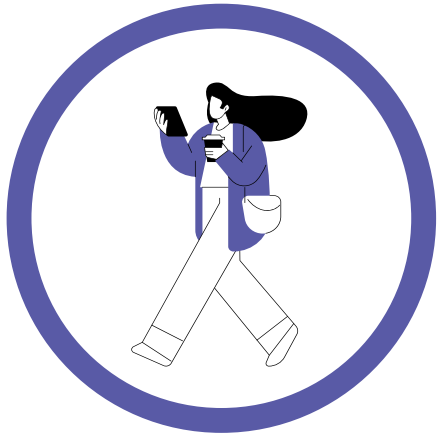


Rider **Personas**

Persona A

Transit System Navigator

Dedicated public transit riders who rely on public transportation for their daily activities due to a lack of access to a personal vehicle or the inability to drive.



Persona B

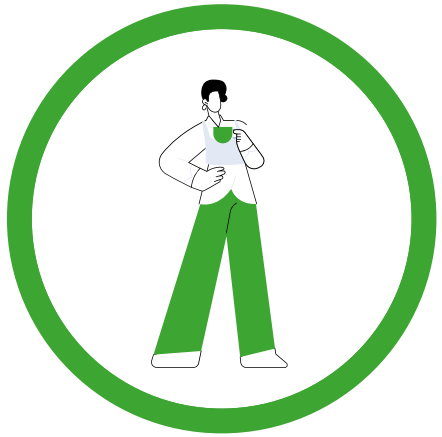
Versatile Traveler

People who might choose public transit for a commute one day, switch to bicycling for short trips or use ride-hailing services when it's most convenient.

Persona C

Event-Driven Explorer

Individuals who primarily use public transit for specific purposes, with a strong focus on attending events and reaching destinations where transit offers a more convenient and efficient option.



Persona D

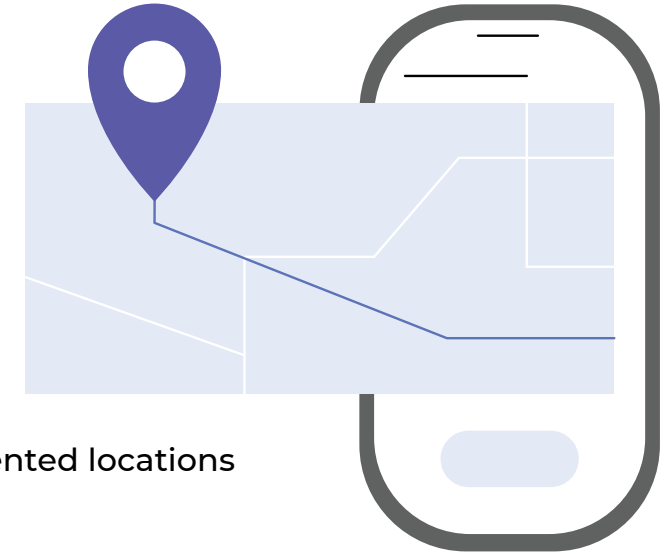
Transit Sympathizer

These individuals rarely, if ever, use public transportation. They may support public transit in principle, but they prefer to drive for their transportation needs.

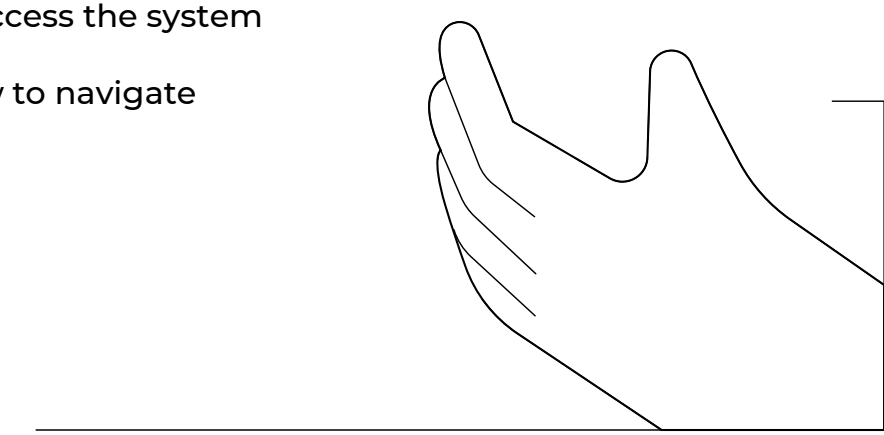
A the Transit System Navigator and The Stressful Trip

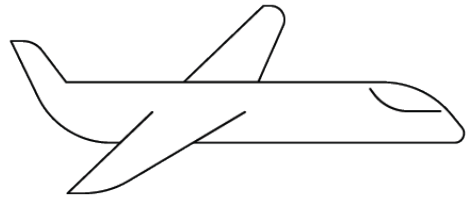
- This persona group largely cannot drive due to age, economic, or other constraints
- Often are Essential Workers who cannot perform their jobs remotely
- Mostly female, including, caregivers and single parents, college/graduate
- Daily and frequent riders may get back on board, if they aren't already, but likely not by choice
- More vulnerable to changes and disruptions than other persona groups
- Struggled the most to achieve work/life balance during the COVID-19 pandemic

B the Versatile Traveler and The Flexible Trip



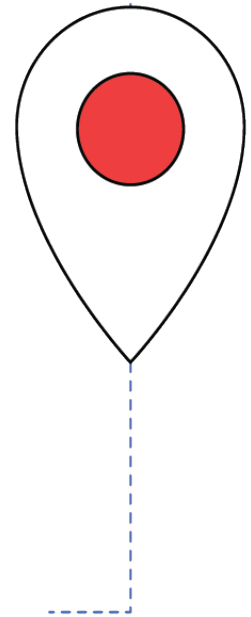
- This persona group is flexible and adaptive in meeting their travel needs
- Professionals; skews to a 35+ demographic
- Occasional rider not regular, not associated with “peak” or “commute”
- Destination oriented vs workplace oriented; focus on leisure/culturally oriented locations
- Convenience is key; often will consider walking, biking or ride-hail
- The challenge to increase the use of transit is “how” to ride and access the system
- Opportunity to build rider confidence with tools to demystify how to navigate





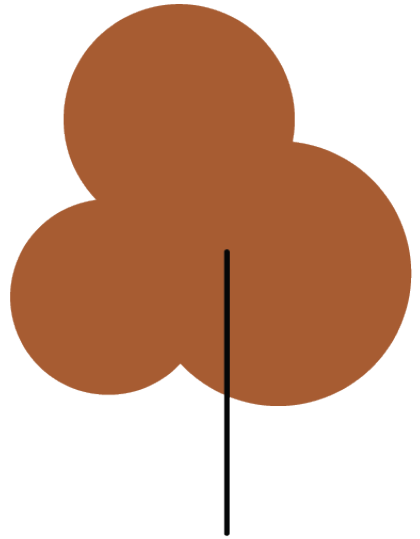
C the Event-Driven Explorer and As Needed Transit Use

- This persona uses transit “as-needed,” primarily for leisure and other trips – they have choices.
- Large age range 25-65; focuses on convenience, on the go.
- Not opposed to using transit, has discretionary monies to opt for ride-hail or other modes; dynamic, no set routine.
- This group of people are not going to the same place all the time.
- Highly values a seamless trip experience through trip planning and fare integration with regional transit providers and ride-hail services, as well as within the transportation network
- High need of understanding to get from one location to the next – customer information and trip planning is important.



D It’s for Everyone Else but not Me.

- This persona group will be the toughest to win back since they were the first to leave if they used transit at all; most aren’t willing to travel by transit.
- Represent a wide range from retired, unemployed, a remote worker or someone who rarely travels; likely owns a private vehicle.
- Sustainability and climate-change is a core value amongst this persona group.
- Providing value is key for this persona group; seeing others take transit will encourage this group to try transit for some trips.
- Social influencing and trends of ridership increases among other persona groups may drive these potential riders to the system.



1 **IDEA**
Aman neevds to take a routine trip from his house in Pagedale to the Barnes-Jewish Hospital in Saint Louis

2 **PLAN**
Aman knows the route to walk from his house to the Rock Road MetroLink station & checks the scheduled arrival times on the Transit App

3 **PRE-BOARD**
Aman times his walk to the station so that he arrives 3 minutes before his train to Downtown arrives

4 **THE RIDE**
Aman uses the Transit App to pay his fare, boards, finds a seat, and rides 15 minutes to the Central West End station

5 **END OF JOURNEY**
Aman exits Central West walks
4 minutes to the Barnes-Jewish Hospital

6 **BETWEEN RIDES**
Aman engages with St. Louis Metro outreach & votes for transit funding and improvement measures

1 **IDEA**
Camilo lives in Tucson and realized he can take the streetcar to his job at the Tucson Museum of Art

2 **PLAN**
Camilo uses Google Maps to find the streetcar station closest to his dorm at University of Arizona

3 **PRE-BOARD**
Camilo walks to the SL/University/Tyndall station from his dorm and waits for about
6 minutes

4 **THE RIDE**
Camilo boards fare-free, finds a seat, & enjoys the smooth 13-minute ride

5 **END OF JOURNEY**
Camilo alights at the SL/Congress/Church station and walks 5 minutes to the Tucson

6 **BETWEEN RIDES**
Camilo tells his friends about the free ride & supports leaders who will continue to make transit fare-free

1 **IDEA**
BBrianna wants to go from her house in North Denver to Downtown for her favorite grocery store

2 **PLAN**
Brianna opens up Lyft to look at ride prices, but picks the cheaper e-bike option instead

3 **PRE-BOARD**
Brianna follows directions in the Lyft app to find a nearby bike, a roughly 7 minute walk

4 **THE RIDE**
Brianna unlocks and rides the e-bike for the 15 minute journey using bike lanes on Larimer Street

5 **END OF JOURNEY**
Brianna finds a nearby dock, drops the bike & locks it with the Lyft app, and walks the final quarter mile

6 **BETWEEN RIDES**
Brianna considers biking again for similar trips & looks into a bikeshare membership

1 **IDEA**
Dana's friend suggests taking the ferry to Oracle Park in San Francisco instead of driving from Oakland

2 **PLAN**
Dana checks the game-day schedule & learns she can get free parking at the ferry terminal

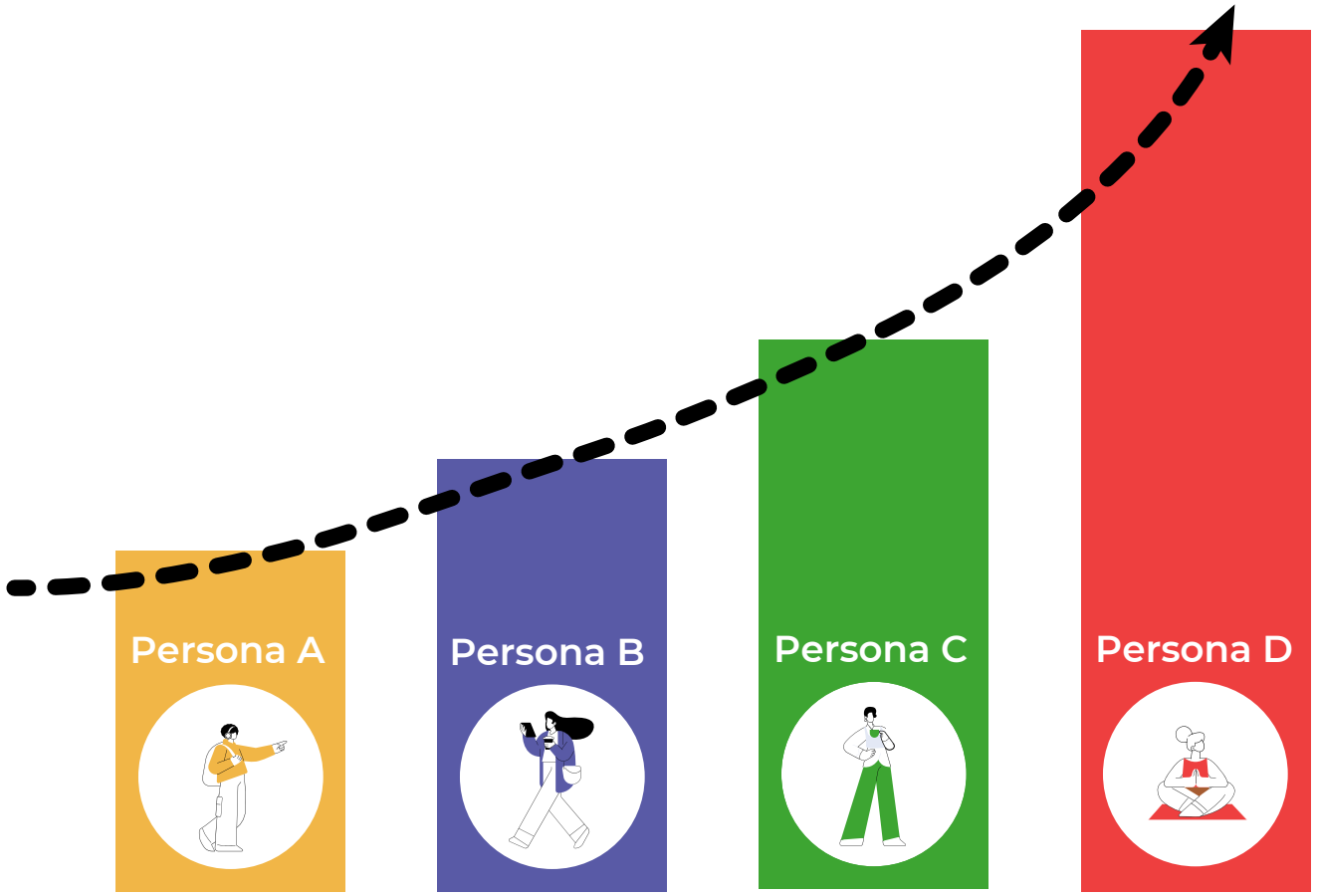
3 **PRE-BOARD**
Dana and her friend park at the ferry terminal garage & queue at the ferry terminal gate

4 **THE RIDE**
Dana boards and buys a paper ticket and enjoys the views from the boat during the ride

5 **END OF JOURNEY**
Dana alights the boat & notices other riders using Clipper Cards as they enter the stadium

6 **BETWEEN RIDES**
Dana considers riding again & supporting transit funding measures after her good experience

Cost of customer **acquisition increases** from Persona **A to D**



*Therefore, **agencies** should **focus** effort and resources **on** Personas B and C*

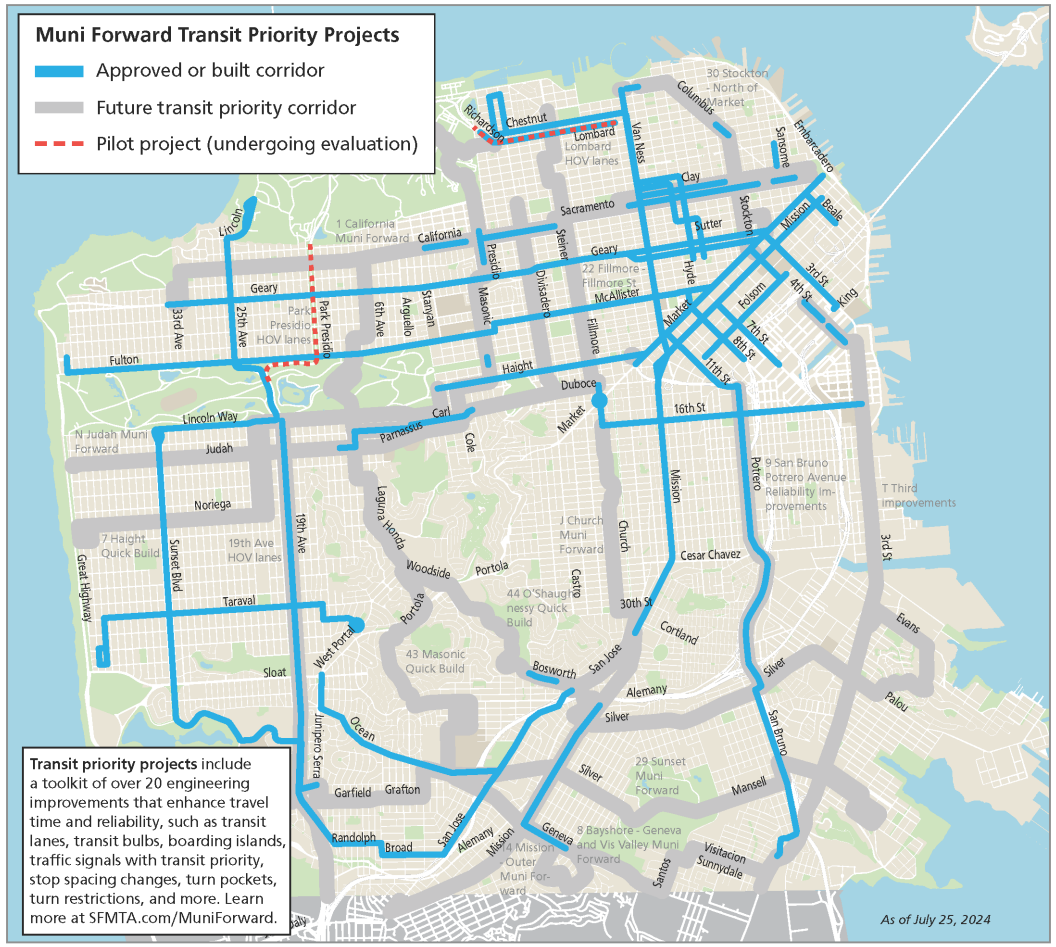
Rider **Personas**

Personas help us understand what interventions can help attract non-riders

Examples:

1. Service design: rapid network
2. Stop/station cleanliness
3. Fare compliance

1. Service design: rapid network



Source: Pi.1415926535 - Own work, CC BY-SA 4.0, https://commons.wikimedia.org/w/index.php?curid=116590157

2. Stop/station cleanliness

3. Fare compliance

Phase III

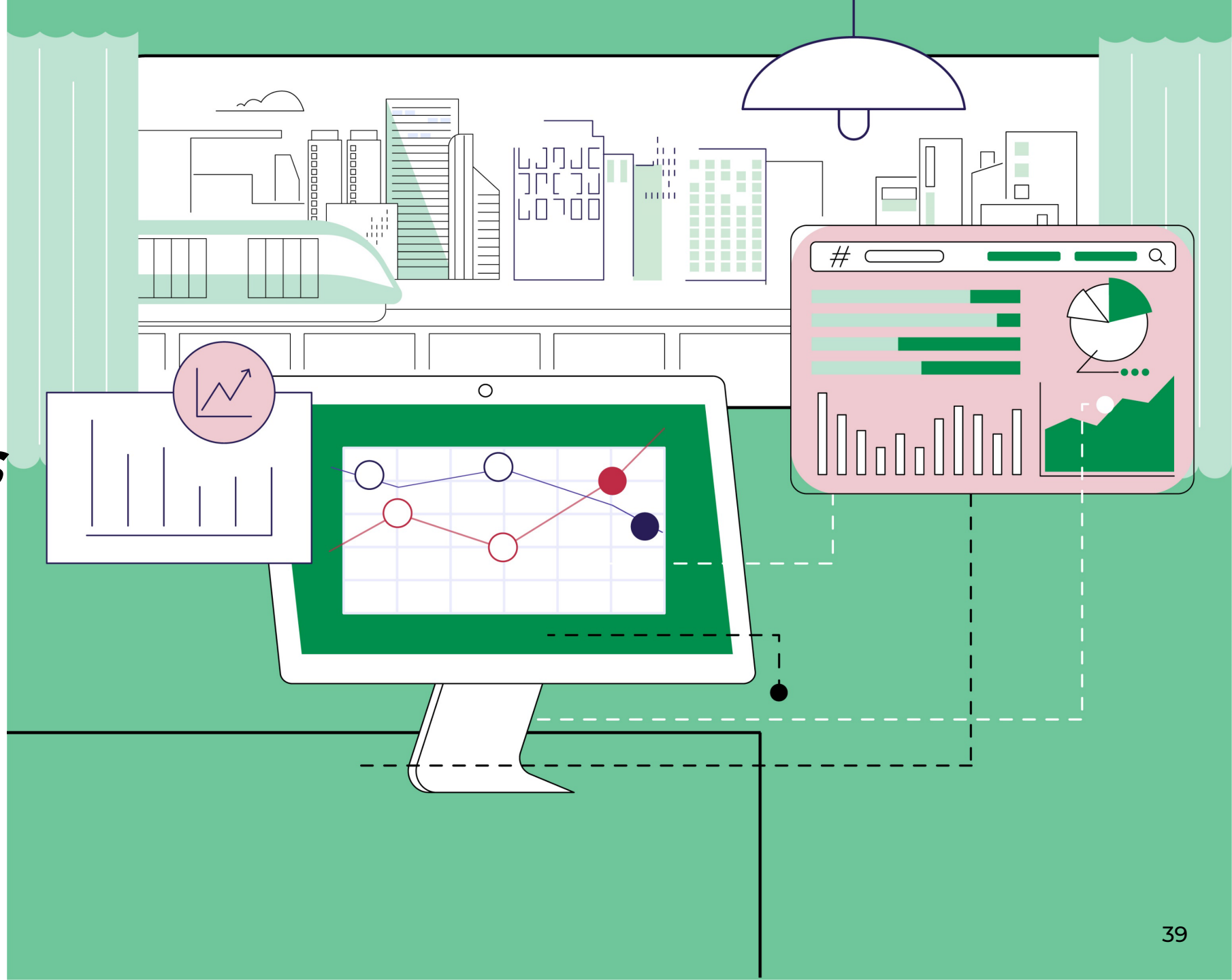
Marketing Campaign

How do we ***encourage*** *new or lapsed* ***riders*** *to* ***use*** ***transit?***

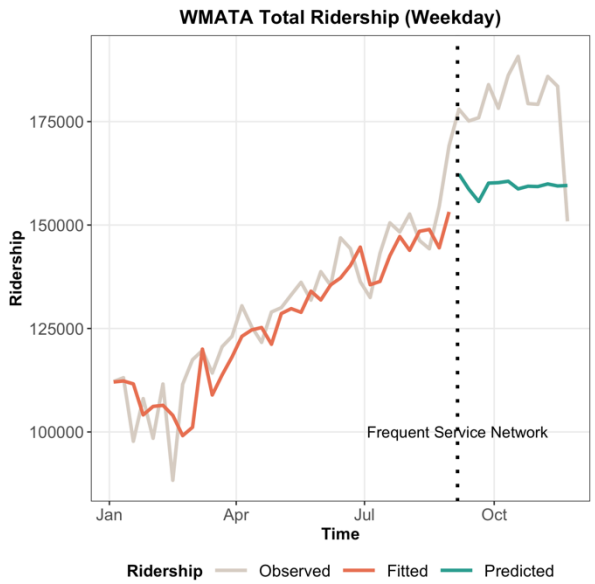
Phase IV

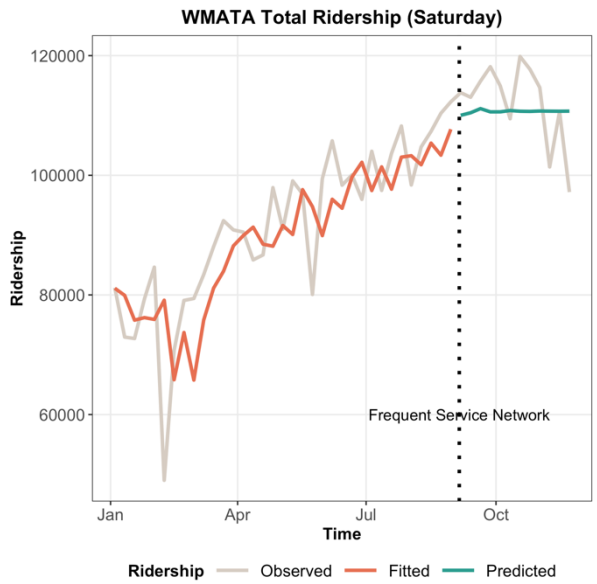
Data Model

How do we measure impacts of ***interventions*** *on transit system ridership?*



Data **Model**


WMATA Total Ridership (Weekday)
Ridership
Time
Frequent Service Network
Jan
Apr
Jul
Oct
Ridership Observed Fitted Predicted


WMATA Total Ridership (Saturday)
Ridership
Time
Frequent Service Network
Jan
Apr
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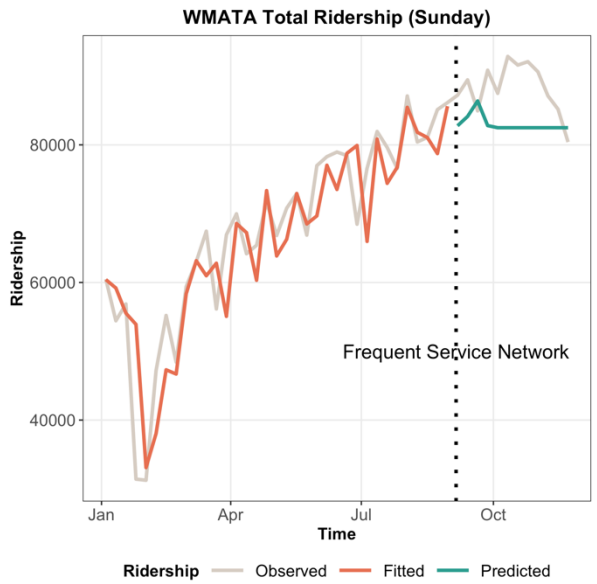
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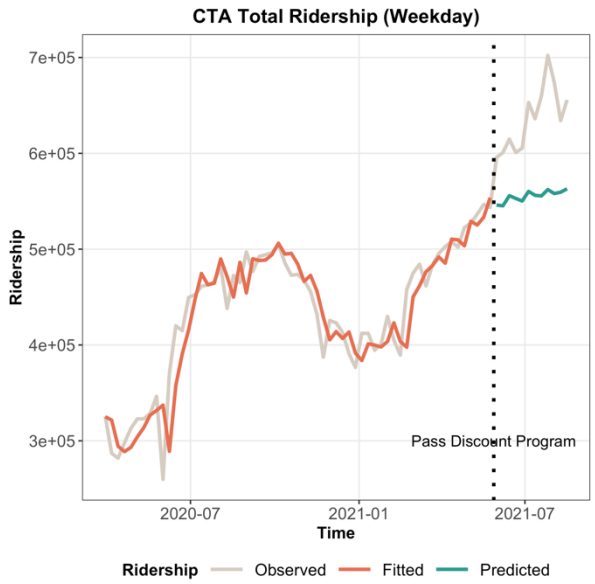
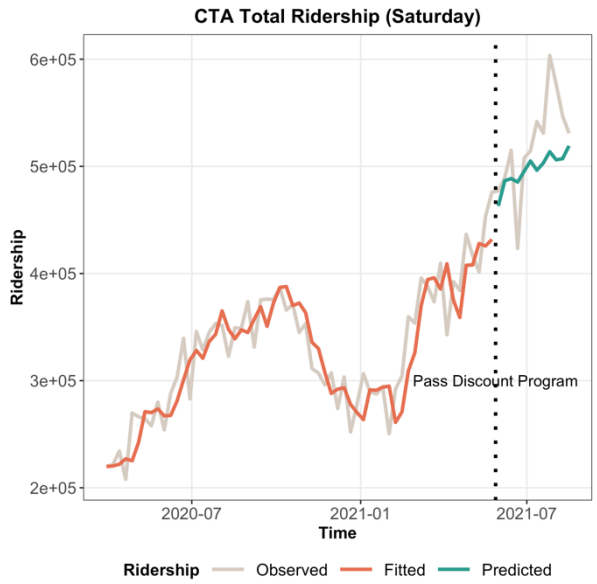

CTA Total Ridership (Weekday)
Ridership
Time
Pass Discount Program
2020-07
2021-01
2021-07
Ridership Observed Fitted Predicted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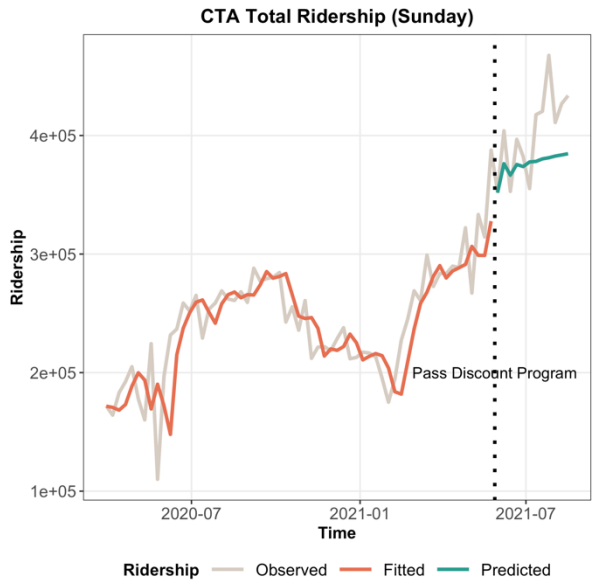
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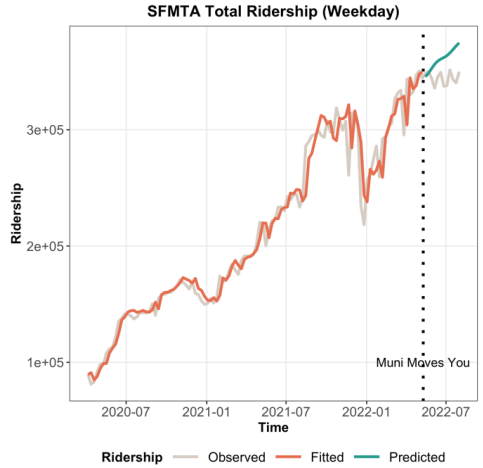
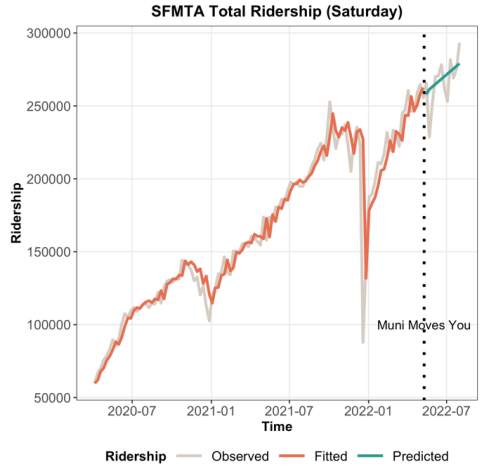

SFMTA Total Ridership (Weekday)
Ridership
Time
Muni Moves You
2020-07
2021-01
2021-07
2022-01
2022-07
Ridership Observed Fitted Predicted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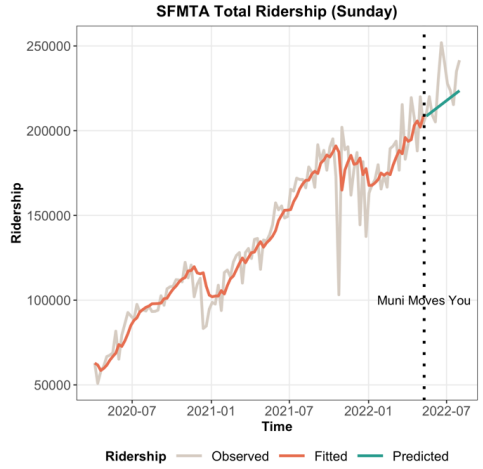
2022-07
Ridership Observed Fitted Predicted


SFMTA Total Ridership (Sunday)
Ridership
Time
Muni Moves You
2020-07
2021-01
2021-07
2022-01
2022-07
Ridership Observed Fitted Predicted

Thank you.

Find more at
https://www.sfmta.com/projects/national-transit-adaptation-strategy

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