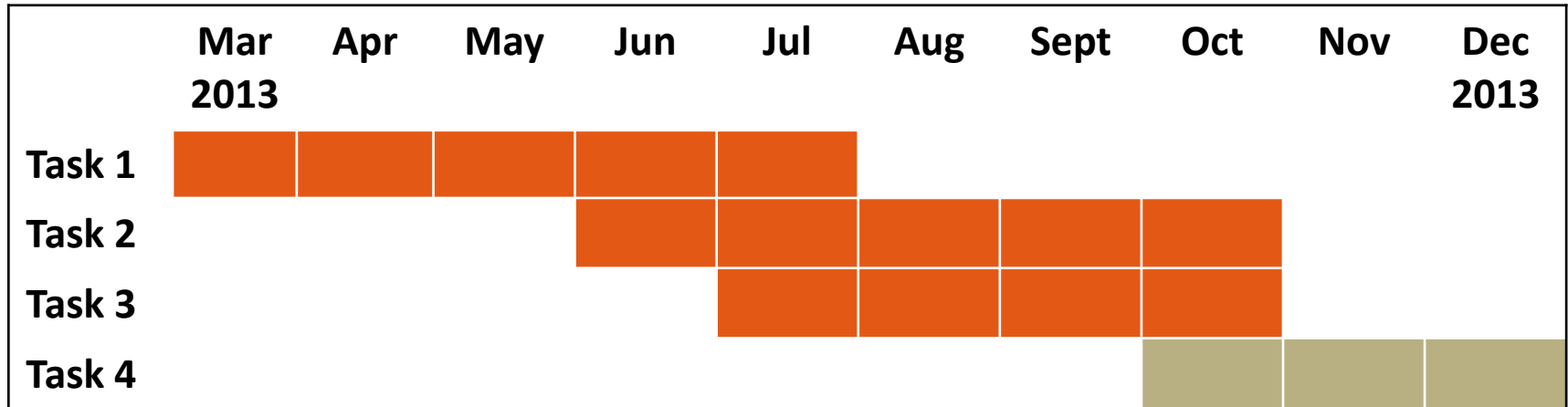


Regional Multi-Modal Public Transit Automated Fare Collection Study

Tasks 2 & 3 Findings

Regional Transit Committee
October 10, 2013

Project Status



Task 1: Regional Best Practices Assessment

Task 2: National Review of Systems Serving Multiple Regional Partners

Task 3: Industry Directions in Next Generation Fare Collection Technology

Task 4: Recommendations Document

Task 2 Overview

National Review of Systems Serving Multiple Regional Partners

- Inform ARC & partner transit agencies on approaches and lessons learned by peer regional fare systems
 - Governance
 - Procurement Approach
 - Fare Policy Coordination
 - Roll-out Strategy
 - System Administration

Task 2: Peer Regional Fare Systems

Name	Region	Partner Agencies
SmarTrip	Washington, DC	WMATA DASH, Ride On Fairfax Connector ART, CUE, TheBus Loudoun County Omnicore DC Circulator MTA (Baltimore, MD)
Clipper	San Francisco Bay Area	SFMTA (Muni) BART AC Transit Caltrain Golden Gate Transit Samtrans SCVTA WETA (ferry)
TAP	Los Angeles	LACMTA Santa Clarita Culver City AVTA Foothill Transit Norwalk Montebello
ORCA	Seattle	King County Metro Sound Transit Pierce Transit Community Transit WS Ferry Kitsap Transit Everett Transit
GoTo Card	Minneapolis/St. Paul	Metro Transit Northstar Maple Grove Minnesota Valley Plymouth Metrolink Shakopee SouthWest Campus Connector Ramsey Star Express
Connect	Sacramento	Regional Transit (RT) Elk Grove e-tran Yolobus El Dorado Transit Folsom Stage Line Yuba-Sutter Transit Roseville Transit
EasyCard	South Florida	Miami-Dade Transit SFRTA/Tri-Rail Hialeah Transit Conchita Transit
PRESTO	Ontario, CAN	GO Transit Burlington Transit Durham Reg Transit Mississauga Transit Oakville Transit Hamilton St Rwy Toronto Transit Com York Region Transit OC Transpo

Task 2: Governance

Model	Peer Systems
Interlocal Cooperation	Seattle (ORCA)
Federated Governance Model	Ontario/Toronto (PRESTO)
Memorandum of Understanding (MOU)	San Francisco Bay Area (Clipper) Sacramento (Connect) Los Angeles (TAP)
Ad-hoc Interagency Cooperation	Washington, DC (SmarTrip) Minneapolis-St. Paul (GoTo Card)

Task 2: Procurement Approaches

Approach	Peer Systems
Large agency procures/deploys; other follow	Los Angeles (TAP) Washington, DC (SmarTrip) South Florida/Miami (EasyCard)
Agencies organize consortium effort	Seattle (ORCA)
MPO organizes/leads	Sacramento (Connect) San Francisco Bay Area (Clipper) Ontario/Toronto (PRESTO) Minneapolis-St. Paul (GoTo Card)

Task 2: Fare Policy Coordination

- Agencies retain control of their fares
- Regional monthly passes set in advance
 - Seattle: Puget Pass
 - Los Angeles: EZ Transit Pass
 - Washington, DC: Regional bus pass
- Interagency agreements continue in place
 - Transfers, joint passes

Task 2: Public Acceptance

Market Penetration	
San Francisco Bay Area (Clipper)	~45%
Sacramento (Connect)	<test phase>
South Florida (EasyCard)	Bus: 26% Rail: 100%
Minneapolis-St. Paul (GoTo Card)	52%
Seattle (ORCA)	66%
Ontario, CA (PRESTO)	80%
Washington, DC (SmarTrip)	92%
Los Angeles (TAP)	Bus: 70% Rail: 100%

- Lower penetration on local bus services
- Higher penetration on rail & ferry
- Some barrier rail systems use card exclusively

Task 3 Overview

Industry Directions in Next Generation Fare Collection Technology

- Covers system, operational & business practices, such as:
 - Fare Media
 - Fare Policies
 - Fare Collection Equipment
 - Open Payments & Architectures
 - Payment Methods
 - Central Data Systems
 - e-Commerce & Web Portals
 - Outsourced Services
 - Multi-Modal Integration
 - Regional Systems
- Not limited to 8 peer fare systems looked at in Task 2

Task 3: Fare Technologies

Category	Discussion
Fare Media	<ul style="list-style-type: none">• Various types of contactless smart cards in use• Several agencies moving toward acceptance of gift cards & bank cards for fare payment at fare gates/fareboxes• Mobile phones on horizon, but approaches still evolving• <i>Agencies include: Philadelphia, Utah</i>
Fare Policies	<ul style="list-style-type: none">• Regional associations have implemented widely different balances between regional & local emphases• For U.S. regional programs, objective has been to allow each operator to keep own fare structure & basic fare policies• However, in some programs, operators have sought to coordinate certain aspects of fare policies• <i>Agencies include: Seattle region, San Francisco region</i>
Fare Collection Equipment	<ul style="list-style-type: none">• Fare equipment continues to evolve, especially to meet requirements of emerging payment methods• Hardware certified to meet newer credit/debit requirements becoming more prevalent

Task 3: Fare Technologies

Category	Discussion
Architectures	<ul style="list-style-type: none">• Card-based, account-based & open payments approaches all being utilized• Some agencies seeking Systems Integrator approach• Agencies seeking control over key interfaces for future flexibility• <i>Agencies include: Utah, Ontario</i>
Payment Methods	<ul style="list-style-type: none">• Key methods continue to include: credit & debit cards, retail sales programs, student programs, transit benefit programs & vouchers• Cash continues to be accepted• New business models for retail sales programs emerging• <i>Agencies include: Denver, Washington</i>
Central Data Systems	<ul style="list-style-type: none">• Collect transaction & sales data, manage fare media• Transparency (or lack thereof) of data is often critical issue among agencies in a region• <i>Agencies include: Minneapolis, Chicago, Seattle region</i>

Task 3: Fare Technologies

Category	Discussion
Outsourced Services	<ul style="list-style-type: none">• Most common outsourcing involves Customer Service (call center, order fulfillment, and related functions)• Maintenance & Revenue Collection Services also outsourced• <i>Agencies include: Philadelphia</i>
Multi-Modal Integration	<ul style="list-style-type: none">• Challenges often driven by different fare structures (support flat <i>and</i> distance-based fares)• Also affected by different fare inspection approaches (e.g. fareboxes <i>and</i> Proof of Payment)• <i>Agencies include: San Francisco region, Washington DC, Seattle region</i>
Regional Systems	<ul style="list-style-type: none">• Regardless of formal governance, success requires buy-in from all agencies• Disputes regarding fare policies & fare collection approaches can lead to cost & time impacts• <i>Agencies include: Los Angeles, San Francisco region, Seattle region</i>

Task 4 Overview

Recommendations Document

- October – December 2013
- Synthesize analysis and recommendations from Tasks 1-3
- Will develop recommendations for:
 - Short-term improvements to existing Breeze system
 - Identify goals for next generation of fare collection in the Atlanta region
 - Strategic roadmap to implement recommendations
- Discussion on efficiencies and return on investments