

## ATTACHMENT E

**From:** Evan Koff, Wake Transit Planner, Capital Area MPO

**To:** Wake County Transit Planning Advisory Committee (TPAC)

**Date:** 10/13/2021

**Re:** Wake Transit-Funded Bus Service Performance Review - Planning and Prioritization Subcommittee Findings (2021 Review)

At its August 21, 2019, regular meeting, the TPAC endorsed a framework for the Planning and Prioritization Subcommittee to review the performance of Wake Transit-funded bus services. The purpose of this review is to evaluate the performance of bus services against established targets set for each service type in the Wake Bus Service Guidelines and Performance Measures adopted by the Wake Transit governing boards. This review is scheduled to occur on an annual basis between June and August using quarterly performance metrics reported by project sponsors through the third quarter of the preceding fiscal year. The timing of this review is to allow the reported information and results of the associated review to inform project funding requests submitted in the fall for the next fiscal year Wake Transit Work Plan. The results of the review may also be used by the TPAC to inform or recommend potential changes to Wake Transit-funded bus services that maximize the productive and responsible use of bus service funding allocations. Such changes may be geared toward improving productivity for under-performing services or toward providing additional resources for over-performing services.

There are four (4) performance measures with established targets against which Wake Transit-funded bus services are evaluated. These measures include:

- Passenger Boardings per Revenue Hour or Trip (depending on service type)
- Cost per Passenger Boarding
- Farebox Recovery
- On-Time Performance

Per the adopted Wake Bus Service Guidelines and Performance Measures, a route is considered underperforming if, after an 18-month developmental period, it falls short of hitting three or more established targets for three or more consecutive quarters. A route is considered overperforming if, after an 18-month developmental period, it is hitting three or more established targets for three or more consecutive quarters. All other routes are considered neither underperforming nor overperforming.

### **Impacts of Coronavirus on Transit Service Performance Tracking**

Over the past fiscal year, our nation attempted to respond in kind to the social and economic needs highlighted by the ongoing Coronavirus Disease 2019 (COVID-19) pandemic. Much of the congressional response took the form of funding allocations through multiple legislative efforts - most notably the Coronavirus Aid, Relief, and Economic Security (CARES) Act, the Coronavirus Response and Relief Supplemental Appropriations Act (CRRSAA) and the American Rescue Plan (ARP) Act. These three pieces of legislation resulted in our region receiving a combined allocation of \$75,780,874<sup>1</sup> towards transit.

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<sup>1</sup> These allocations were broken down by transit provider as follows: City of Raleigh: \$50,858,755; Town of Cary: \$9,445,695; GoTriangle: \$8,841,559; and Wake County: \$6,634,865

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This funding helped Wake County's transit providers pay for the strict health and safety protocols enacted at the beginning of the pandemic while simultaneously delivering safe, effective, and reliable public transportation. A large part of the federal funding allocation was set aside to allow for a region-wide suspension on the collection of fares through the end of fiscal year (FY) 2022. One consequence of suspending fare collection is it makes farebox recovery data unavailable when determining whether a service is over or under-performing. Without this data, making determinations on overall service performance based upon the adopted Wake Bus Service Guidelines and Performance Measures is a tenuous endeavor. Therefore, CAMPO staff was not able to assign a designation of overperforming or underperforming to any services during the scope of this performance review.

### **Impacts of Coronavirus on Transit Service Productivity**

In FY 2020, with the onset of the COVID-19 pandemic, all transit services, including Wake Transit-funded services, reduced service capacity to meet current demand and better facilitate health and safety protocols. Over the course of FY 2021, demand for transit has rebounded to about 70% of pre-pandemic levels. However, as with other industries in our region, filling operator vacancies, despite tactics such as increased starting wages, other incentives, and aggressive marketing, has proven to be a challenge for every Wake Transit-funded service provider. As a result, while demand has improved, human capacity, and in turn service, have remained stunted. Accordingly, it is important to temper expectations of performance against the applicable targets with an understanding that these conditions inevitably led to significant impacts.

### **Summary of Bus Service Performance Reviews by Provider**

The Planning and Prioritization Subcommittee reviewed bus service performance data from Q2 of FY 2020 through Q3 of FY 2021 at its August 24<sup>th</sup> regular meeting which resulted in the following findings:

#### **GoRaleigh Bus Services**

GoRaleigh operates 12 fixed routes that are currently subject to the annual performance evaluation process, four (4) of which are currently within an 18-month developmental period. However, three (3) of those four (4) will graduate from their 18-month developmental period in the first quarter of FY 2022. The remaining route (Route 21: Caraleigh) will not graduate from its 18-month developmental period until the first quarter of FY 2023. Following is a summary of these routes' performance, as well as some important points provided by City of Raleigh staff on route performance, giving particular attention to how resilient the routes have proven themselves to be over the course of the pandemic:

- Route 21: Caraleigh and Route 7: South Saunders have both exhibited exceptional resiliency during this evaluation period. Route 21, which still has five (5) quarters remaining in its developmental period, has consistently exceeded its load factor in the past. City staff has looked into a variety of service enhancements to meet current demand including introducing bi-directional service and increasing frequency to three (3) times per hour. Staff expects additional potential frequency recommendations to follow with the completion of the Dix Park Edge Study. Likewise, Route 7 continues to seed the market for the Wake Bus Rapid Transit (BRT): Southern Corridor service. City staff is currently discussing what level of service should remain once the southern BRT has been deployed.

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- The services that make up the Southeast Route Package have also shown resiliency during this evaluation period apart from Route 18S. This route is designed to serve a downtown commuter market, which has left it vulnerable when fewer businesses in the downtown area of Raleigh were operating in-person. As more downtown businesses have reopened, the market has shown an increase in demand, and staff will continue to monitor its progress.
- Routes 20: Garner, 33: Knightdale, and 401X: Rolesville serve very different markets connecting Raleigh to three different outlying municipalities. All three (3) routes completed their developmental period at the height of the pandemic, which staff believes has slowed market growth. City staff's outlook for Route 20's ridership market is particularly bullish due to its recent extension to a housing development on Timber Drive, future increases in transit-supportive land use along the route, and its scheduled expansion in FY24 to serve a highly demanded weekend market. In addition, City staff is building bus stop enhancements along Routes 20 and 33 to bolster ridership by providing more comfortable access, while implementing a three-pronged marketing scheme (radio, print, digital media) to increase visibility for all three routes. While staff's long-term forecast for Routes 20 and 33 are strong, staff moved to using smaller, less costly vehicles to serve Route 401X in July 2021, as the service has shown to not be very competitive when compared to travel by single-occupancy-vehicle.
- The services comprising the Northwest Route Package also experienced their developmental period during the time of greatest uncertainty. However, despite this period of generally substandard performance, City staff remains optimistic. Following through on their plans discussed in the FY20 Bus Service Performance Review, City staff is implementing a system-wide marketing strategy which includes targeted employer and social-media outreach along the Northwest Route Package corridors. Furthermore, staff is confident that the market will expand once there is increased connectivity and transfer opportunities to downtown Raleigh via implementation of the Glenwood Route Package and Route 9.

Following is a table portraying the general performance of each Wake Transit-funded GoRaleigh route against the targets set for those routes by the adopted Wake Bus Service Guidelines and Performance Measures. Check marks indicate the applicable service is not underperforming with respect to the applicable targets for the three (3) consecutive quarters ending with the 3<sup>rd</sup> quarter of FY 21 (i.e., the service did not fall short of hitting the respective target for all of the last three [3] consecutive quarters reviewed or for both of the last two [2] consecutive quarters for services in operation for less than three [3] quarters). Routes shaded in pink are still in their 18-month developmental period.

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Route	Boardings/Revenue Hour or /Trip	Cost/Boarding	Farebox Recovery	On-Time Performance
Route 7: South Saunders	--	✓	N/A	✓
Route 17: Rock Quarry	--	--	N/A	✓
Route 18: Poole-Barwell	--	✓	N/A	✓
Route 18S: Poole	--	--	N/A	✓
Route 19: MLK-Sunnybrook	--	✓	N/A	✓
Route 20: Garner	--	--	N/A	✓
Route 21: Caraleigh	✓	✓	N/A	✓
Route 26: Edwards Mill	--	--	N/A	✓
Route 27: Blue Ridge	--	--	N/A	✓
Route 33: Knightdale	--	--	N/A	✓
Route 36: Creedmoor	--	--	N/A	✓
Route 401: Rolesville	--	--	N/A	✓

### **GoTriangle Bus Services**

GoTriangle currently operates seven (7) fixed routes that are subject to the annual performance evaluation process, three (3) of which are currently in their 18-month developmental period. GoTriangle's services can be categorized into core routes and commuter-oriented routes. The core routes follow the service patterns of all-day services, while the commuter-oriented routes tend to focus on providing service during peak commute times. It should be noted that during this evaluation period, the core routes displayed much more resilience to the pandemic than that of the commuter-oriented routes. At the time of the evaluation, ridership on midday and evening services was barely 10% less than pre-pandemic ridership, while weekday peak service ridership has declined significantly. Weekend ridership was very similar to pre-pandemic levels. Following is a summary of these routes' performance, as well as some important points provided by GoTriangle staff on route performance:

- Route 100: Raleigh-Airport-Regional Transit Center (RTC) is one of GoTriangle's four core routes supplemented with Wake Transit funds. As a core route, its productivity during this year's evaluation period has improved when compared to the 2020 evaluation period and

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when compared to GoTriangle's peak service routes. GoTriangle staff has stated that the conversion of Route 100 to being a more direct trip between downtown Raleigh and the Regional Transit Center (RTC), with service to RDU Airport being provided as a shuttle from the RTC, along with the suspension of Route 105's parallel duplicative service are likely the reasons for its improved performance.

- GoTriangle's remaining Wake Transit-funded core routes are Route 300: Raleigh – Cary, Route 305: Raleigh – Apex – Holly Springs, and Route 310: Cary – Wake Tech – RTC. GoTriangle staff is looking at increasing marketing and Transportation Demand Management (TDM) efforts, as well as targeted outreach according to recent ridership trends to boost visibility in these markets, and thus increase service productivity. In this spirit, GoTriangle staff is working closely with staff from the Town of Holly Springs to better understand community needs and to improve reliability. When Route 305's all-day service is able to commence, it can suitably serve the true travel market. However, it has been and is currently very difficult to expand service as a result of an operator labor shortage and the pandemic. Major changes to Route 300, which reset its developmental period, had a positive impact on cost per boarding compared to pre-pandemic productivity. Route 300, like the City of Raleigh's Route 7, is a market builder for future BRT. Staff recommends studying this market further, as well as the service market in the Route 310 corridor as part of the Wake Bus Plan update, given the number of competing services operating in that market. GoTriangle staff mentioned potential changes that could be implemented later in the year to Route 310 that would better align service with GoCary's pulse at the Cary Depot, which would reduce the current transfer penalty between GoCary routes and Route 310. Lastly, staff recommends that, as part of the Wake Bus Plan update, Route 300's current boardings metric, "Boardings per Trip" be replaced with "Boardings per Revenue Hour" given its reality as a shorter route.
- In addressing the pandemic challenges facing GoTriangle's peak services (Durham – Raleigh Express, Chapel Hill – Raleigh Express, and Fuquay-Varina – Raleigh Express), staff posited that pandemic-related policies, which encouraged remote learning at each of these municipalities' major educational institutions (Duke University, UNC Chapel Hill, North Carolina State University, and Wake Tech) are directly correlated to route productivity, and that staff will watch productivity on these routes as those policies begin to loosen. Further, employment commuting ridership has taken the biggest hit as a result of the pandemic, and these services are heavily dependent on employment commuting. Consequently, their recovery will depend heavily on the direction this type of travel market heads emerging from the pandemic.

Following is a table portraying the general performance of each Wake Transit-funded GoTriangle route against the targets set for those routes by the adopted Wake Bus Service Guidelines and Performance Measures. Check marks indicate the applicable service is is not underperforming with respect to the applicable targets for the three (3) consecutive quarters ending with the 3rd quarter of FY 21 (i.e., the service did not fall short of hitting the respective target for all the last three [3] consecutive quarters reviewed). Routes shaded in pink are in their 18-month developmental period.

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Route	Boardings/Revenue Hour or /Trip	Cost/Boarding	Farebox Recovery	On-Time Performance
Route 100	--	--	N/A	✓
Route 300	--	--	N/A	✓
Route 305	--	--	N/A	✓
Route 310	--	--	N/A	✓
Route CRX	--	--	N/A	✓
Route DRX	--	--	N/A	✓
Route FRX	--	--	N/A	✓

It should be noted that much debate occurred during this annual bus service performance review process that was focused on how to both interpret and apply the policy to restart a route's developmental period as described in the adopted Wake Bus Service Guidelines and Performance Measures. For GoTriangle, it was determined that while the changes to Route 100 did not rise to the level laid out in the policy, changes to Route 300 did rise to such a level.

### **GoCary Bus Services**

GoCary operates seven (7) fixed routes that are currently subject to the annual performance evaluation process. Of the Town of Cary's original four (4) services (Routes 3: Harrison Avenue, 4: High House Road, 5: Kildaire Farm Road, and 6: Buck Jones Road), which pre-existed Wake Transit and subsequently received Wake Transit funding to increase midday frequencies and expand the span of service to include Sundays and holidays, Routes 3 and 6 experienced major service changes in FY 2021 Q3, which caused them to restart their developmental period. During this same quarter, the Town began service on a number of new routes, including Route 1: Crossroads, Route 7: Weston Parkway, and the Apex – Cary Express. All three of the services have just begun their developmental period. As was found with City of Raleigh and GoTriangle services, the peak-period service on the Town's routes have suffered the largest hit to ridership, while midday, evening, and weekend trips continue to hold strong relative to their peak time counterparts and pre-pandemic performance. The following is a summary of these routes' performance, as well as some important points provided by Town of Cary staff on route performance:

- One of Route 4's largest pre-pandemic drivers of ridership was the Cary Senior Center adjacent to Bond Park. As a health and safety protocol, service to the senior center was halted during the peak of the pandemic when the vaccine was not yet available. Since then, service has resumed to the center, and the route has seen a recent uptick in ridership. This route has had challenges in keeping to on-time performance standards as a result of deviations to directness of travel. While an unprotected left turn at the senior center is currently unavoidable, to improve on-time performance, Town staff has

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eliminated a U-turn on Maynard Road and proposed eliminating some of the major shopping center deviations.

- Route 5's productivity has shown to be very resilient over the course of the pandemic. Town staff attributes this route's success to its varied and distributed land use patterns and a cornucopia of highly transit-supportive points of interest. Additional bus stops and associated enhancements will be installed in concert with a Town water main project along the corridor. When complete, this will be the Town's first legacy corridor to boast 100% ADA-compliant bus stops. Staff also noted that productivity on this route may appear slightly lower than usual, because the route's span was recently increased by 30 minutes.
- The Town's Route 6 planned service changes, which occurred in FY 2021 Q3, amount to designating the service as a new route. Therefore, the service has entered a new developmental period. These service changes altered the route from directly serving many trip-generating origins and destinations that it has previously served. As a new service, the market will have six (6) quarters to mature before being measured against the adopted Wake Transit performance targets. Route 3 will also enter a new developmental period, as its service changes crossed the established threshold in the adopted Service Guidelines and Performance Measures.
- The Apex – Cary Express and Routes 1, 3, and 7 have all recently begun their respective developmental periods, and Town staff will follow their productivity closely. Staffs from both CAMPO and the Town discussed the functionality of the Apex – Cary Express's operation before the initiation of the Western BRT corridor and commuter rail service. Town staff mentioned that while the express service is not getting much traction, through surveying ridership, staff has discovered that the corridor could probably be better served (pre-BRT) as a local route.

Following is a table portraying the general performance of each Wake Transit-funded GoCary route against the targets set for those routes by the adopted Wake Bus Service Guidelines and Performance Measures. Check marks indicate the applicable service is not underperforming with respect to the applicable targets for the three (3) consecutive quarters ending with the 3rd quarter of FY 21 (i.e., the service did not fall short of hitting the respective target for all of the the last three [3] consecutive quarters reviewed or for the last quarter for services in operation for less than two [2] quarters). Routes shaded in pink are in their 18-month developmental period.

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Route	Boardings/Revenue Hour or /Trip	Cost/Boarding	Farebox Recovery	On-Time Performance
Route 1: Crossroads	--	--	N/A	✓
Route 3: Harrison Avenue	--	--	N/A	✓
Route 4: High House Road	--	--	N/A	--
Route 5: Kildaire Farm Road	--	✓	N/A	✓
Route 6: Buck Jones Road	--	✓	N/A	✓
Route 7: Weston Pkwy	--	--	N/A	--
Route ACX: Apex-Cary	--	--	N/A	✓

### GoWake Access Services

Over the course of the pandemic and this evaluation period, GoWake Access' Wake Transit-funded services have consistently met established performance targets for cost per boarding<sup>2</sup>. While the services fell short with respect to boardings per revenue hour or per trip, the difference between their performance and that performance metric target is negligible. Since last year's evaluation, GoWake Access' services with respect to on-time performance have considerably improved and are now on target. It is anticipated that additional funding for rural elderly, disabled and general public demand-response trips and the implementation of recommendations from the GoWake Access Northeastern Microtransit study will improve both productivity and on-time performance, particularly in areas of the county where meeting those targets is difficult because of low population and trip densities.

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<sup>2</sup> Before the suspension of fare collection, GoWakeAccess was also meeting its farebox recovery performance targets.