



KING COUNTY

1200 King County Courthouse
516 Third Avenue
Seattle, WA 98104

Signature Report

November 14, 2017

Ordinance 18608

Proposed No. 2017-0350.2

Sponsors Dembowski and Balducci

1 AN ORDINANCE relating to public transportation,
2 revising rates of fare and eliminating the regular fare peak,
3 off-peak and zone fare differential; and amending
4 Ordinance 13480, Section 2, as amended, and K.C.C.
5 4A.700.010 and Ordinance 12643, Section 9, as amended,
6 and K.C.C 4A.700.090.

7 STATEMENT OF FACTS:

8 1. K.C.C. 4A.700.010 provides for separate off-peak, one-zone peak and
9 two-zone peak fares for full fare adult riders, with zones as set forth in
10 K.C.C. 28.92.030, and time of day limitations for peak and off-peak
11 period trips as set forth in K.C.C. 28.92.115 and 28.92.100.

12 2. The King County Metro Strategic Plan for Public Transportation, 2011-
13 2021, 2015 Update, includes "Strategy 6.3.2: Establish fare structures and
14 fare levels that are simple to understand, aligned with other service
15 providers, and meet revenue targets established by Metro's fund
16 management policies."

17 3. A recent peer comparison of thirty comparable bus transit agencies in
18 the United States and Canada found that King County Metro was one of
19 only two agencies with both zones and general time of day pricing.

20 4. Metro is the only ORCA transit agency with fares that vary by time of
21 day.

22 5. The 2016 Regional Fare Forum (“Fare Forum”), made up of members
23 representing the policy boards of each of the ORCA agencies, including
24 members of the King County council, was convened last year with a
25 mission to reaffirm agency commitments to regional fare coordination and
26 discuss strategies to further integrate and simplify fares to allow customers
27 to travel seamlessly throughout the region. Among other things, the Fare
28 Forum recommended that ORCA agencies work to simplify fares by
29 eliminating fares that vary by zone and time-of-day.

30 6. In a March-April 2017 survey to obtain public feedback on Metro's
31 fares, thirty-two percent of respondents indicated they found Metro's fares
32 confusing, or very confusing.

33 7. An extensive public outreach program conducted by Metro in spring of
34 2017 found considerable public support for replacing Metro's current fare
35 structure with a single regular adult fare of \$2.75 regardless of time of day
36 and without zone boundaries.

37 8. As part of Metro's public engagement effort, more than six thousand
38 four hundred people participated in an online survey about two fare
39 simplification options (one a flat fare of \$2.75 applicable regardless of
40 time of day or zone and the other a variable fare of \$2.50 for off-peak
41 periods and \$3.00 for peak periods). Eighty percent of respondents liked
42 the option of a single, regular adult fare of \$2.75.

43 BE IT ORDAINED BY THE COUNCIL OF KING COUNTY:

44 SECTION 1. Ordinance 13480, Section 2, as amended, and K.C.C. 4A.700.010

45 are hereby amended to read as follows:

46 A. Except as may otherwise be provided by ordinance, the following fare
 47 categories and rates are established for regularly scheduled county public transportation
 48 service on buses, trolleys, transit vans, dial-a-ride vehicles and streetcars:

	((Off- peak	One-zone Peak	Two-zone peak))
Regular fare	(((\$2.50)) \$2.75	(((\$2.75	(\$3.25))
Child fare	No charge	((No charge	No charge))
Youth fare	\$1.50	(((\$1.50	(\$1.50))
Seniors and persons with disabilities fare	\$1.00	(((\$1.00	(\$1.00))
Low-income fare	\$1.50	(((\$1.50	(\$1.50))

49 The fare categories and rates are subject to, and defined by, the following:

- 50 1. ~~((The descriptions of transit zones are set forth in K.C.C. 28.94.030;~~
- 51 2. ~~The time-of-day limitations for peak period trips and off-peak period trips are~~
 52 ~~in K.C.C. 28.92.115 and 28.92.100 except as to streetcar services, which may be priced at~~
 53 ~~peak fares;~~
- 54 3.)) The child fare is available to persons up to six years old when accompanied
 55 by a responsible person paying the proper fare as set forth in this chapter. Up to four
 56 children may ride with each responsible person;

57 ~~((4.))~~ 2. The youth fare is available to persons from six through eighteen years
58 old and persons over eighteen years old who receive student passes under K.C.C.
59 4A.700.450;

60 ~~((5.))~~ 3. The senior and persons with disabilities fare is available to persons who
61 apply for and receive a regional reduced fare permit. The permits are available to persons
62 at least sixty-five years old and persons with disabilities as provided in the regional
63 reduced fare permit program authorized under K.C.C. 28.94.255;

64 ~~((6.))~~ 4. A person with a disability who has been issued an "attendant ride free"
65 permit by the department may be accompanied by an attendant, who is not required to
66 pay a fare; and

67 ~~((7.))~~ 5. The low-income fare is available to persons who apply for and are
68 determined to meet the threshold eligibility requirements for the low-income transit fare
69 program authorized under K.C.C. 4A.700.490 and receive a valid low-income transit fare
70 product.

71 B. A fare in subsection A. of this section is paid when a person pays the
72 appropriate amount in cash or presents an appropriate pass, transfer or other fare payment
73 media established under and used in accordance with this chapter.

74 C.1. Regional and institutional passes, in various single-trip value denominations
75 and for various effective periods, may be issued and sold in accordance with the terms of
76 an agreement approved by the council and entered into with other public transportation
77 providers in the region. Institutions include employers, groups of employers, educational
78 institutions, transportation management associations and other organizations. The
79 effective periods, single-trip values and prices for the regional and institutional passes

80 shall be established by the agreement. A valid regional or institutional pass may be
81 presented an unlimited number of times during its effective period as full or partial
82 payment of the applicable fare. To the extent the single trip value of the regional pass is
83 not sufficient to cover the applicable fare, the rider shall pay the difference in cash or
84 from an electronic stored value product, such as e purse.

85 2. For institutions entering into an annual institutional pass agreement, the
86 following schedule of calculations shall determine the cost of the annual agreement for
87 King County Metro's portion of the agreement:

First twelve months:	$TR \times \text{baseline trips}$
Second twelve months:	$(TR \times \text{baseline trips}) + [(TR \times \text{added trips}) \times 1/3]$
Third twelve months:	$(TR \times \text{baseline trips}) + [(TR \times \text{added trips}) \times 2/3]$
Fourth twelve months (and subsequent 12 month periods):	$(TR \times \text{baseline trips}) + (TR \times \text{added trips})$

88 For purposes of this formula, "added trips" means those trips taken during the
89 prior twelve months, determined either from surveys or electronic counting of actual
90 institutional pass use, that exceed the number of baseline trips established at the
91 execution of the institutional pass agreement. Electronic counts of one month or more
92 will be annualized and used in lieu of survey results if available.

93 For purposes of this formula, "baseline trips" means the estimated number of
94 transit trips taken by the contracting party's covered population of students, employees or
95 others, or any combination thereof, in the twelve months preceding execution of the
96 institutional pass agreement. Baseline trips may be adjusted on an annual basis to account

97 for changes in the number of eligible employees.

98 For purposes of this formula, in the event a party terminates or does not renew an
99 institutional pass agreement, any subsequent institutional pass agreement entered into
100 with that party shall be priced as if in the "fourth twelve months and thereafter" category.

101 For purposes of this formula, "trip revenue" or "TR" means the weighted average
102 fare per trip determined by the department.

103 D. The rate of fare for paratransit service shall be \$1.75 per trip and \$63.00 for a
104 monthly pass.

105 E. The rate of fare for customized bus service to residents of Center Park, a
106 facility of the Seattle Housing Authority located at 2121 - 26th Avenue South, Seattle, is
107 equal to the paratransit fares specified in subsection D. of this section.

108 SECTION 2. Ordinance 12643, Section 11, as amended, and K.C.C. 4A.700.050
109 are hereby amended to read as follows:

110 The following procedure and rate of fare shall be used for animals riding on
111 coaches. For small animals that do not occupy space other than the lap of the person
112 accompanying the animal and for assistive animals, there shall be no fare charged. For
113 all other animals, a fare equivalent to the fare paid by the individual accompanying the
114 animal shall be charged and a transfer issued upon request (~~except that no zone fare shall~~
115 ~~be charged~~). Animals riding on coaches shall be leashed or otherwise restrained and
116 shall not pose a problem of health, injury to property or persons or disturbance to other
117 passengers.

118 SECTION 3. Ordinance 12643, Section 9, as amended, and K.C.C. 4A.700.090 is
119 hereby amended to read as follows:

120 The director is authorized to establish rates of fare for limited service to special or
121 seasonal activities or events, but only if the rates of fare and any contributions are
122 established at a level reasonably estimated to recover at least twenty-five percent of the
123 marginal cost for the service hours provided. In addition, the rates of fare for limited
124 service shall be established at a level at least equal to the rates of fare for equivalent
125 regularly scheduled service. If, however, the limited service is not equivalent to any
126 regular service, then the rates of fare shall be no less than one-half of the ((~~one zone, off-~~
127 ~~peak full~~) regular fare set forth in this chapter. The limited services shall be on an
128 individual fare-paying basis and be scheduled according to such routes, schedules and

129 dates as are determined by the director.

130 SECTION 4. This ordinance takes effect July 1, 2018.

131

Ordinance 18608 was introduced on 8/28/2017 and passed by the Metropolitan King County Council on 11/13/2017, by the following vote:

Yes: 9 - Mr. von Reichbauer, Mr. Gossett, Ms. Lambert, Mr. Dunn,
Mr. McDermott, Mr. Dembowski, Mr. Upthegrove, Ms. Kohl-Welles
and Ms. Balducci
No: 0
Excused: 0

KING COUNTY COUNCIL
KING COUNTY, WASHINGTON



ATTEST:

Melani Pedroza

Melani Pedroza, Clerk of the Council

APPROVED this 21 day of NOVEMBER, 2017.

Dow Constantine

Dow Constantine, County Executive

Attachments: A. Fare Simplification Ordinance Report, B. Title VI Analysis dated September 19, 2017, C. Public Engagement Report

**King County Metro Transit
Fare Simplification Ordinance Report**

July 12, 2017

Prepared for:
King County Council

Prepared by:



**Department of Transportation
Metro Transit Division**
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Alternative Formats Available
206-477-3832 TTY Relay: 711

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Executive Summary

This report examines potential opportunities for simplifying King County Metro Transit's complex fare structure, and concludes that Metro could make fare payment easier, improve safety, speed up operations, and increase transit access and affordability for some riders by adopting a flat fare for full-fare adult riders, at all times of day, no matter where a rider is going.

The ORCA Joint Board's initiation of the Next Generation ORCA project gave Metro an opportunity to address a long-standing issue: fare simplification. Metro's current fare structure, one of the most complex in the country, is confusing. It has seven customer categories as well as surcharges for adult riders during peak-period travel (6-9 a.m. and 3-6 p.m.) and on trips that cross zone boundaries. Customers have told us our fare structure is difficult to understand. Simplification would make fares easier to understand and would improve Metro's efficiency.

For these reasons, along with recommendations from elected officials representing ORCA agencies in a Regional Fares Forum, and Metro's policy objectives and guidelines, Metro decided to re-examine our fare structure and consider specific approaches to simplification.

The first phase of our Fares Work Program focused on fare simplification, regional coordination, and affordability. Based on the work conducted in this phase, **Metro recommends that the King County Council adopt a \$2.75 flat fare for full-fare adult riders during all hours of day and across all areas of the county, for implementation in July 2018.** These changes would make fares easier to understand and pay, reduce travel time by speeding up boarding, increase access and affordability for some riders, and improve safety by reducing fare confusion and disputes between customers and bus operators. It would also help Metro prepare for and improve the efficiency of Next Generation ORCA and coordinate Metro's fare structure with regional partners. *The recommended changes would apply only to full fare adult riders (69 percent of Metro's ridership).* ORCA LIFT, youth, senior, and disabled fares would remain unchanged.

As with any change of this magnitude, this proposal would benefit some riders and negatively impact others. Although it is impossible to mitigate all negative impacts on our riders, this report highlights the ways Metro plans to address some of the negative impacts of simplification. Metro proposes to expand the Human Services Ticket Program, continue working with partners to enhance programs for college students, increase ORCA LIFT outreach, reduce card fees, and continue to evaluate the fares program to increase access and affordability for low-income and very-low-income riders. (See Appendix 1, Summary of Recommendations in Phase 1 of Metro's 2017-2018 Fares Work Program.)

This report also points to areas needing further research that can be addressed in Phase 2. Metro has more work to do to equitably address the service needs of our priority populations – low-income communities, communities of color, immigrant and refugee communities, and limited English-speaking communities – and attempt to find ways to provide affordable, accessible mobility options for all people in King County. Growing income disparities in King County create an inherent disproportionate impact from fares on our priority populations who pay a greater percentage of their income towards transit because they more heavily depend on public transportation to access basic needs including jobs, housing, food, education, and health and social services. We recognize this fact, and we will work to provide access and affordability to those who can least afford to travel.

The main goals of the second phase of Metro's Fares Work Program (late 2017-2018) are continuing to increase equitable access and affordability, speed up operations for customers, and improve safety. Metro will balance these goals with meeting the farebox recovery requirement, reflecting the cost of service through fare policies, and complying with federal regulations.

Background

The process of developing this fare-change recommendation began in 2016, when the ORCA Joint Board initiated the Next Generation ORCA project. This regional project aims to build on the success of, and address concerns with, the current ORCA fare payment system. Next Generation ORCA will be a scalable, modern system that will improve the customer experience, prepare for expected regional transit growth and integration, and provide flexibility to adapt to emerging public transportation opportunities.

The Joint Board recognized the importance of re-evaluating current fare structures and making necessary improvements now, to prepare for Next Generation ORCA. The more complicated Metro's fare structure is, the more time and money it will cost to design the Next Generation ORCA system, and the greater the risk of project delay. With this in mind, the ORCA Joint Board called for a Regional Fare Forum in 2016 to discuss and make recommendations on regional fare structure and fare simplification. Forum members represented the governing bodies of each ORCA agency (Sound Transit, Pierce Transit, Everett Transit, King County, Kitsap Transit, Community Transit, and Washington State Ferries), and included King County Council members Claudia Balducci and Rod Dembowski.

After considering three different options for fare structure changes, the Forum recommended examining the potential for simplifying the regional fare structure by eliminating zone-based fares and the peak/off-peak fare structure. Metro took these recommendations into account when considering options for our own fare change proposal for full-fare adult riders. Metro did not consider changes to ORCA LIFT, youth, senior, or disabled fares.

This fare simplification proposal is a key element of the first phase of Metro's 2017-2018 Fares Work Program, which aims to achieve the following key objectives:

- | | |
|---|---|
| → Improve safety | <i>Minimize negative interactions between operators and customers in fare transactions</i> |
| → Simplify fares | <i>Make fares easier to understand and pay</i> |
| → Coordinate with regional partners | <i>Better coordinate fares with regional partners in preparation for Next Generation ORCA</i> |
| → Speed operations | <i>Speed up buses and reduce travel time by making fare payment faster</i> |
| → Increase transit ridership and reduce affordability barriers | <i>Begin to identify affordability barriers and opportunities to address these for low-income or other rider groups</i> |

Throughout the fares program, Metro has been continually balancing goals, needs, and requirements to provide the best system possible. We want to facilitate equitable access to our transit system and provide as much service as possible. Other goals include meeting the farebox cost recovery requirement, reflecting the cost of service through fare policies, and complying with federal regulations. Our recommendations and planned actions reflect Metro's policy goals, adopted by the King County Council in Metro's Strategic Plan for Public Transportation and Fund Management Policies. They especially reflect Strategic Plan Strategy 6.3.2, which states, "Establish fare structures and fare levels that are easy to understand, aligned with other service providers, and meet revenue targets by Metro's fund management policies."

Our recommendations also align with other plans adopted by the County Council, including Metro's Service Guidelines, the Metro Connects long-range plan, and King County's Strategic Plan for Equity and Social Justice. Metro Connects establishes a vision of increasing Metro's service by 70 percent and

envisions an expanded network of frequent service. Simplifying fares will help Metro achieve this more smoothly. These policy documents guide our work and provide a framework for assessing fare change options.

The first phase of Metro's Fares Work Program began with the Regional Fare Forum in fall 2016 and will continue through 2017. This phase focuses primarily on simplifying fares and coordinating Metro's fare structure with its regional partners. In the latter half of 2017 and in 2018, Metro will move into the work program's second phase and work to address a broader range of fare-related issues and opportunities raised by transit operators, human services agencies, advocacy groups, elected officials and other stakeholders in King County. Phase 2 will build on lessons learned in the first phase. Metro will focus on addressing affordability barriers to increase equitable access and transit ridership, and examine ways to improve safety for operators and speeding fare payment and boarding, including transfers and off-board fare payment.

Existing Conditions

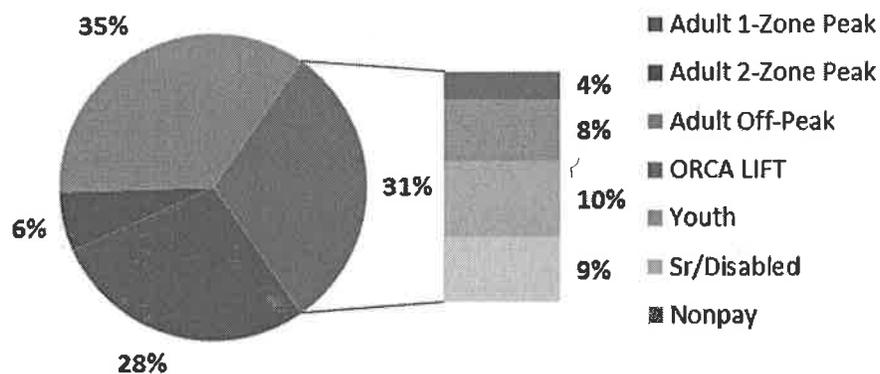
With seven customer categories and surcharges for peak-period travel and trips that cross the zone boundary for full-fare adult riders (Table 1), Metro's current fare structure is confusing and among the most complex in the nation:

Table 1: Metro's Current Bus Fares

	Off-peak	One-zone peak	Two-zone peak	Monthly pass
Full-fare adult fare	\$2.50	\$2.75	\$3.25	\$90/\$99/\$117
Child (five years and under)	No charge			
Youth (six through 18)	\$1.50			\$54
Seniors and persons with disabilities (RRFP)	\$1.00			\$36
ORCA LIFT (low-income adult)	\$1.50			\$54

Adult riders pay higher fares if they travel at peak commute time (6-9 a.m. or 3-6 p.m.) and if they cross the zone boundary (approximately Seattle city limits) during peak hours. *As a result, an adult rider might pay \$2.50, \$2.75, or \$3.25 on the same route depending on when and how far they travel.* This could be especially confusing for riders who pay with cash, E-purse, or purchase their own passes, in addition to limited English-speaking riders, new and infrequent riders, and visitors.

As shown in Fig. 1, full-fare adult riders comprise 69 percent of Metro's ridership, so this complex fare structure impacts the majority of our customers. One-zone peak refers to trips during peak commute periods (6-9 a.m. or 3-6 p.m.) within the zone boundary (Seattle city limits). Two-zone peak refers to peak-period trips that cross that zone boundary. Zones do not apply on off-peak trips, which occur outside of the peak-commute periods. The 31 percent of riders who pay ORCA LIFT, youth, or senior/disabled (RRFP) fares, in addition to children five and under and fare evaders (non-paying riders), would not be affected by this proposed fare change. Simplification would also not impact Access fares.

Figure 1: Distribution of Metro Boardings by Fare Category, 2016¹

Fares have an inherent disproportionate negative impact on lower income populations, people of color, limited English-speaking communities, and immigrants and refugees, who pay a greater percentage of their income towards transportation. Metro acknowledges this and the need to work to understand the barriers to access of those most negatively impacted. Metro runs several programs to increase affordability of and access to transit among our county's low-income, homeless, and other historically disadvantaged populations². The ORCA LIFT program, which launched in 2015 and provides a reduced fare of \$1.50 to adults below 200 percent of the federal poverty level, has been a model for the nation. Metro also provides a discounted fare of \$1.50 to youth (ages 6-18) and, between June and early September of 2017, is piloting a reduced summer ORCA youth fare of \$0.50 with a free ORCA card. Metro offers a \$1 reduced fare for senior/disabled riders through the Regional Reduced Fare Permit (RRFP). Finally, Metro's Human Services Ticket Program helps human service agencies provide transit opportunities for King County's homeless and very-low-income populations who cannot afford the discounted LIFT fare. In 2016, Metro provided over 1.5 million discounted tickets through this program. Despite these efforts, Metro realizes there is more work to do to better serve the populations that most need transit. For example, there are people who qualify for ORCA LIFT but are not accessing the program. Metro remains committed to working to increase enrollment in ORCA LIFT and continuing other efforts to reduce affordability barriers.

King County is currently experiencing growing income inequality and the suburbanization of poverty. Poverty has shifted significantly to the suburbs over the past two decades. 2010 data shows that more than 140,000 people below the poverty line live in King County outside of Seattle, compared with about 80,000 people in Seattle. Between 2011 and 2015, the King County poverty rate increased by 11.2 percent, compared with 13 percent in South King County³.

Similarly, income inequality has increased substantially in King County over the last 20 years. Between 1999 and 2012, more than 95 percent of the net change in the number of households by income in King County occurred in the "high income" bracket (\$125,000 or more) or the "low income" bracket (under \$35,000).⁴ Income also differs greatly by race. 2007-2011 census data showed the average median income of white households as \$74,700, compared to \$38,700 for African-American/black households

¹ Based on estimates of Metro's ORCA and cash ridership data.

² For a more detailed description of this program, see the "Very-Low-Income Transit Fare Options" report.

³ King County Demographer, King County Office of Performance, Strategy, and Budget.

⁴ King County Demographer, King County Office of Performance, Strategy, and Budget.

and \$49,400 for Hispanic/Latino households. The 20 zip codes with the lowest annual household income tended to be in west and south parts of King County.⁵

Per our FTA-mandated Title VI analysis, Metro's current fare structure results in a disparity between the average adult fare paid on Title VI designated low-income and minority routes and non-low-income and non-minority routes. Currently, the average adult fare on low-income routes is \$0.02 higher than on non-low-income routes. The average adult fare on minority routes is \$0.05 higher than on non-minority routes.

Final Recommendation

Metro recommends that the King County Council adopt a \$2.75 flat fare for full-fare adult riders during all hours of day and across all areas of the county, for implementation in July 2018. This fare structure would aid in simplifying fares, coordinating our fare structure with regional partners, increasing access and affordability for some riders, improving safety by reducing fare disputes, and saving travel time by speeding boarding. Adoption of this option would respond to customer feedback, help increase equity, and better prepare Metro for Next Generation ORCA, while allowing Metro to remain within farebox recovery guidelines.

In order to alleviate the negative impacts of this fare change for some riders, Metro proposes to reduce adult ORCA card fees from \$5 to \$3, eliminate the \$3 fee for the Regional Reduced Fare Permit, increase the Human Service Ticket Program subsidy by 11 percent in 2018 (\$400,000, bringing the total to \$4 million), continue to explore enhancements to college programs for students, and increase outreach to promote ORCA LIFT enrollment and re-enrollment. Metro will also continue researching and working to address ways to speed boarding, increase safety, and reduce affordability barriers for rider groups with the greatest needs in the next phase of its work program.

Impacts of Simplification

Impacts on Riders

As always, fare changes impact various rider groups differently. **This recommended fare change would mean a \$0.50 fare decrease for two-zone peak riders, no change for one-zone peak riders, and a \$0.25 increase for off-peak riders.** Six percent of Metro's 2016 boardings are two-zone peak and would see a \$0.50 decrease. Fifty-nine percent of Metro's boardings are reduced fare or one-zone peak. They would see no changes. Thirty-five percent of boardings in 2016 were off-peak and would see a \$0.25 increase.

Making our system easier to understand would benefit riders by making their payment experience easier – especially those who pay with cash or E-purse, purchase their own passes, or are limited English-speaking, new and infrequent riders, or visitors. Although we cannot assess the impact of this fare change on each individual rider, Metro examined the demographics and ridership characteristics of impacted rider groups, and while we do not know as much as we would like, this research provided some valuable information, summarized below. We remain committed to further studying the needs of these groups in Phase 2 of the fares work program.

Off-Peak Riders

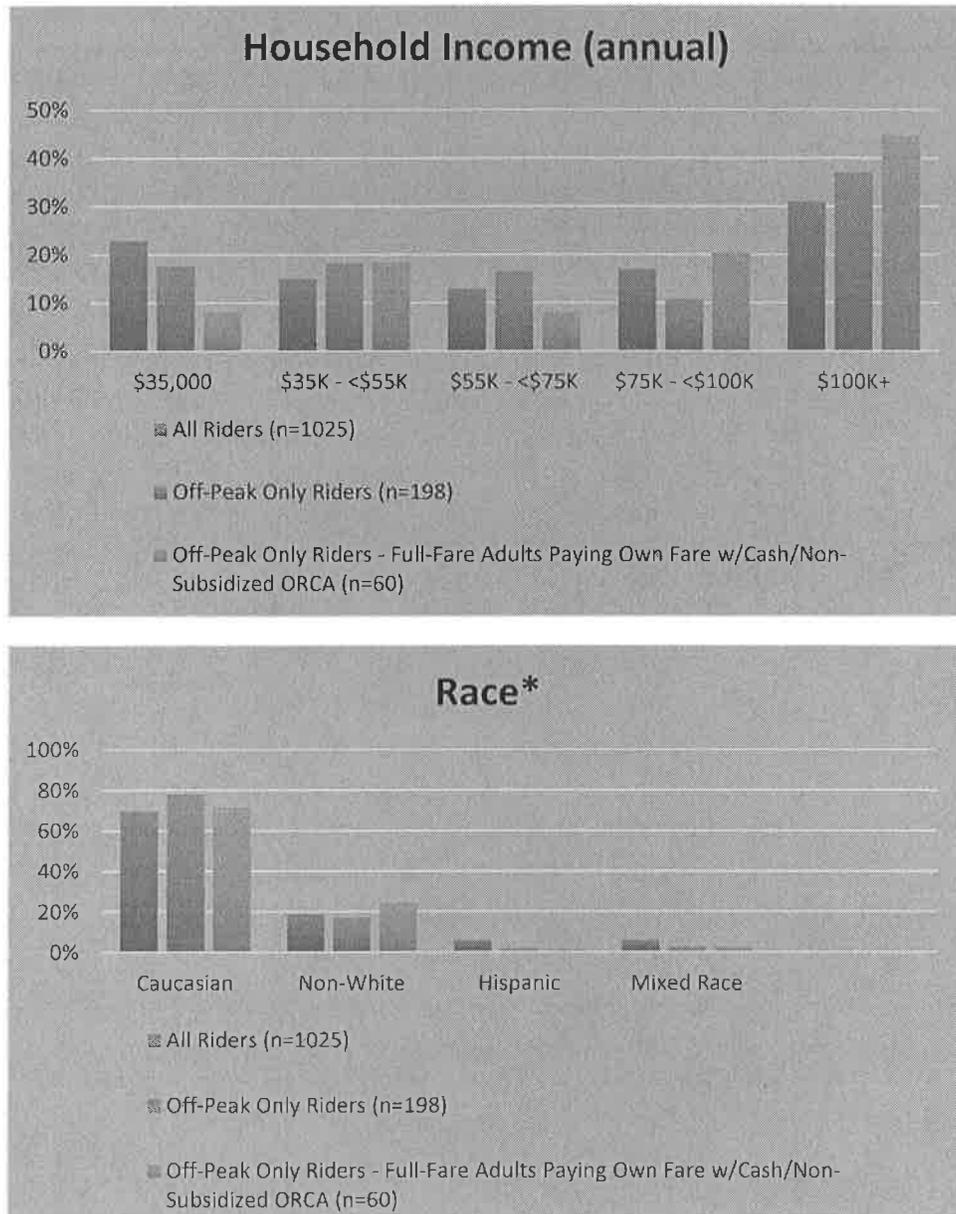
Demographic Information

Fig. 3 illustrates limited demographic information from the 2015 Rider/Non-Rider survey on all riders and off-peak only riders (riders who ride only during the off peak period). "Off-Peak Only Riders" is a

⁵ King County Demographer, King County Office of Performance, Strategy, and Budget.

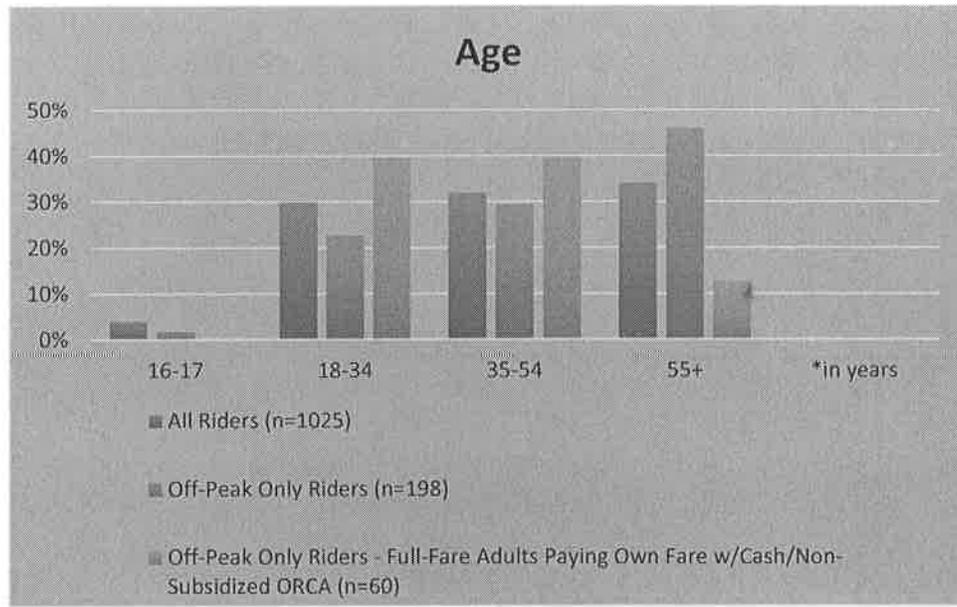
subset of “All-Riders,” and “Off-Peak Only-Riders – Cash/Non-Subsidized ORCA” is a subset of both groups. “Off-Peak Only Riders” represents the 19 percent of all Metro customers, including reduced-fare customers, who ride *only* during the off-peak period. The full-fare adults in that group would be impacted every time they ride. It is important to note that though the survey is designed to reflect the larger rider population, the sample size (n) is small and there is a significant difference in sample size between the all riders and the two subsets.

Figure 2: Demographic Information about Off-Peak Only Riders⁶



*Caucasian and Non-White do not include Hispanic. Non-White includes Black/African-American, American Indian or Alaskan Native, and Asian or Pacific Islander

⁶ From data in the 2015 Rider/Non-Rider Survey.



Overall, the survey data implies that lower-income off-peak only riders will not disproportionately pay the fare increase. The survey indicates that while approximately 23 percent of all riders make less than \$35,000 per year, less than 10 percent of off-peak only riders paying cash or non-subsidized ORCA fares fall into this income category. Similarly, approximately eight percent of off-peak only riders paying their own fare make between \$55,000 per year and \$75,000 per year, while approximately 13 percent of all riders fall within this income range. The proportions of riders making \$35,000 to \$55,000 in those two survey groups are similar (15 percent for all riders versus 19 percent for off-peak only riders paying their own fare). Conversely, of higher income riders (making greater than \$75,000 per year) the proportion who ride off-peak only and pay using cash or non-subsidized ORCA cards is higher than that for all higher-income riders.

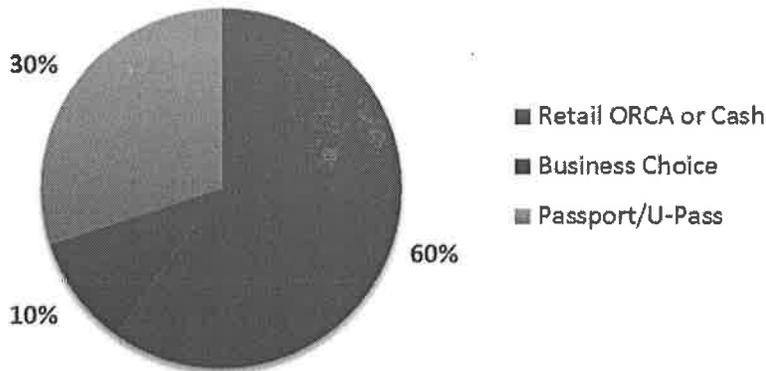
The 2015 Rider/Non-Rider survey also demonstrated that off-peak riders are more likely to ride infrequently (less than five trips a month). The percentage of off-peak only riders riding infrequently (37 percent) is greater than the percentages of peak-only riders and riders who travel during both time periods who ride infrequently (16 and 15 percent, respectively).

Boardings

Off-peak boardings span a longer time period (any time other than 6-9 a.m. and 3-6 p.m) than peak boardings do. As shown earlier in Fig.1, full-fare adult off-peak boardings represent about 35 percent of Metro's total boardings across both zones. Sixty percent of those adults pay their own full fare with cash or ORCA, which means *21 percent of Metro's total boardings come from full-fare adults paying their own fare*. That group will be negatively impacted by the \$0.25 fare increase.

The impacts on the ORCA Business Choice customers would depend upon the mix of passes purchased for their employees. Based on Metro's initial review, the ORCA Passport customers may see a very slight decrease in the Metro cost per trip used in program pricing (\$0.01-\$0.02/trip). The University of Washington may see a very slight increase in their U-Pass program cost because they have a higher percentage of off-peak boardings. Fig. 5 illustrates off-peak ridership by fare category.

Figure 3: 2016 Off-Peak Boardings by Fare Payment Type⁷



Two-Zone Peak Riders

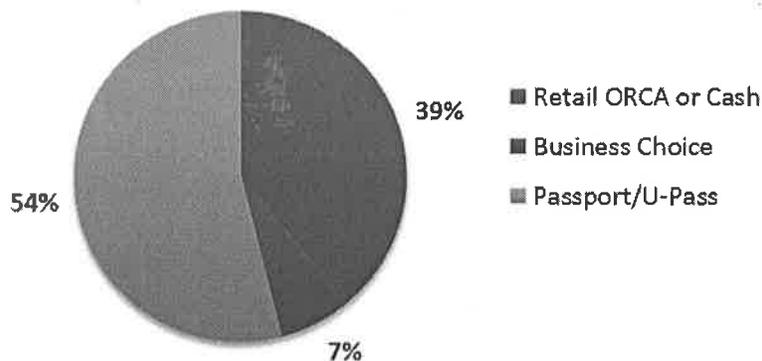
Demographics

Metro could not derive demographic information about two-zone peak riders from the Rider/Non-Rider survey because the survey did not ask about the number of zones traveled.

Boardings

As shown previously in Fig. 1, full-fare adult, two-zone peak boardings represent 6 percent of Metro’s total boardings. Of those riders, 39 percent pay their own full fare with cash or ORCA fare media. These riders would benefit from a \$0.50 decrease in fares. It is likely that the fare decrease for two-zone peak full-fare adults will make it somewhat more affordable for some constituents, especially those who commute across the zone boundary for work and cannot afford to live in Seattle. Fig. 4 illustrates the breakdown of two-zone peak boardings by fare payment type:

Figure 4: 2016 Metro Two-Zone Peak Boardings by Fare Payment Type (Cash and ORCA Data)



Routes designated as minority and low-income per the Title VI regulations⁸ have more two-zone peak boardings than one-zone and off-peak boardings. The Title VI analysis required by the FTA uses proxy data to evaluate potential impacts to low-income and minority populations. This analysis indicated that currently, the average fare for full-fare adults on low-income and minority routes is higher than on non-

⁷ Based on ORCA and cash ridership data

⁸ Routes serving corridors where a greater percentage of boardings are in low-income or minority census tracts than Metro’s corresponding system average. See Title VI report for more information.,

low-income and non-minority routes. The proposed fare change would eliminate this fare disparity for all full-fare adults.

Impacts on Metro's Key Objectives

Simplification: Metro's customers have repeatedly asked for simpler fares: one-third of respondents to the March 2017 online fare survey said they find Metro's fares difficult to understand. Though this survey includes responses from individuals who chose to participate and is not statistically representative of Metro ridership, it does provide valuable insight into the desires of our customers. As mentioned above, eliminating the zone and peak-period surcharges would make fares easier for all customers to understand and pay. This could also speed up boarding and increase safety by reducing fare confusion and possible disputes. With King County's population expected to grow to approximately 3.2 million people by 2030, Metro must help accommodate growth and increased transit use by making fares easier to use and understand.

Regional Coordination: A flat fare would best prepare Metro for the transition to Next Generation ORCA by better coordinating Metro with regional partners. Metro is the only ORCA agency with peak fares, while Sound Transit and Community Transit have zone fares but are working to eliminate zone pricing. Of Metro's peer agencies (the 30 largest agencies in the U.S. plus Vancouver, B.C.), only Metro and Vancouver have both peak and zone surcharges.

Speed Boarding: A \$2.75 flat fare would speed up boarding by reducing interactions between operators and customers that result from fare confusion, improving the customer experience. By saving boarding and trip time, this fare structure change could help decrease the traffic congestion expected from continued growth, construction projects, and transportation changes such as the end of joint rail/bus operations in the Downtown Seattle Transit Tunnel. Simplifying fares would also contribute to smoother off-board fare payment, planned for Third Avenue and additional RapidRide lines.

With the Seattle region looking toward a multi-year period of "maximum constraint" in traffic conditions starting in the 2018-2019 time frame, we should make as many improvements as possible now to simplify and speed up our system.

Increase Safety: A flat fare would likely increase safety by making fare payment and boarding less confusing and decreasing potential customer interactions with operators, which sometimes result in disputes. Planned off-board fare payment, as noted above, will amplify this impact.

Affordability: As outlined above, this fare change would reduce affordability barriers for some (two-zone peak full-fare adults) while increasing them for others (off-peak full-fare adults). Our Title VI analysis, included in this ordinance package, determined that the proposed change would have no disparate impact as defined by the federal Title VI analysis. Beyond the limited scope of the Title VI analysis, we do acknowledge that a change of this magnitude will have real and potentially inherently negative impacts on many of our rider groups, particularly on lower income populations, people of color, limited English-speaking communities, and immigrants and refugees, who pay a greater percentage of their income towards transportation.

Fare simplification would result in a \$0.25 increase for off-peak riders – a negative impact on those riders. Metro has proposed additional actions to reduce affordability barriers and to continue to work to find solutions to address some of the challenges for off-peak riders most negatively impacted by this fare increase. We plan to do more through our second phase of research to understand how to reach and provide access and affordable transportation options to vulnerable populations.

The \$0.50 fare decrease for full-fare adult two-zone peak riders is important considering the dramatic increase in suburban poverty, outside the Seattle zone boundary, over the last 20 years⁹. A \$2.75 flat fare may somewhat increase equity by eliminating the small disparity between the average fares paid on minority and non-minority and on low income and non-low-income routes.

Reflect Cost of Service: It costs more for Metro to operate during peak periods because of slower travel times and more non-revenue mileage (deadheading) than occurs during non-peak hours. The no-peak surcharge option does not reflect the higher cost of peak service as well as some of the other options Metro initially considered.

Other Impacts: Simplification would help employers who partner with Metro to provide transit benefits to their employees. It would also generate internal benefits, making it easier for Metro to administer various pass programs, monitor and project revenue, and communicate our fare structure to riders. The simpler fare structure would allow Metro to advance our other work program objectives more easily. Simplifying Metro's fare structure will reduce project design costs, project risk, and project delay for Next Generation ORCA.

Simplification could also impact transit ridership and use. Though Metro's fare model projects a very slight decrease in ridership, the proposed fare simplification could potentially have the opposite effect. Simpler fares will likely appeal to more riders, and simplifying fare payment could speed up service and result in ridership increases or cost savings. A 2009 study by the Passenger Transport Executive Group reviewed case studies from major urban areas in Europe, North America, and Australia¹⁰. The study found that fare simplification resulted in increases in ridership, some revenue increases, and decreased confusion. Metro anticipates some degree of ridership increase could occur here as well.

Estimated Revenue and Farebox Recovery Impacts

Bus fare revenue is a key funding source for Metro, supporting current and expanding transit service in King County. In 2016, the King County Council emphasized the importance of fare revenue in the update of Metro's Fund Management Policies. The Council set a goal that fare revenue recover 30 percent of transit operating costs, with a required minimum 25 percent farebox recovery floor (Ordinance 18321). Metro's 2016 bus fare revenue was about \$162 million, providing a farebox recovery ratio of approximately 31 percent – above Metro's target. As a result, Metro did not implement a previously planned fare increase in the 2017-2018 biennium to benefit customers and give Metro time to review its fares program.

Any proposed change to Metro's fare structure must ensure that Metro's farebox recovery remain above 25 percent. If a proposed change were to bring Metro's farebox recovery under 25 percent, Metro might have to consider cutting service or delaying service adds as one way to reduce costs. A baseline forecast with no fare changes and current expenditures projects Metro's farebox recovery ratio to be 25.9 percent by 2020. The \$2.75 flat fare would increase net fare revenue by an estimated \$3.5 million, or about 2.2 percent, by 2020. This would increase the farebox recovery ratio in 2020 by 0.5 percent, bringing it to 26.4 percent.

Though moving to a \$2.75 flat fare would generate some additional revenue, it would not generate as much as a traditional \$0.25 fare increase under our current fare structure. The 6-year financial plan

⁹ King County Demographer, King County Office of Performance, Strategy, and Budget.

¹⁰ "The Benefits of Simplified and Integrated Ticketing in Public Transport," Passenger Transport Executive Group. <http://www.urbantransportgroup.org/system/files/general-docs/integratedticketingreportFINALOct09.pdf>

submitted with the 2017-2018 budget assumed general fare increases in 2020 and 2024 that would each generate approximately \$12-15 million in additional fare revenue in the first year after implementation.

Metro is also transmitting several other recommendations with this legislative package to help alleviate the impacts of fare simplification. Some of those recommendations – eliminate the \$3 RRF card fee (pending final approval of a revised RRF MOA by all 16 participating agencies) and increase the subsidy for the Human Services Ticket Program – would impact revenue and farebox recovery. Metro is also working with the ORCA partners to reduce the adult and youth card fee from \$5 to \$3, which would also impact farebox recovery. Metro has had positive conversations with ORCA partner agencies about this change. Table 2 summarizes those implications and the net revenue (fare and other revenue) impact in 2020.

Table 2: 2020 Projected Revenue Effects of Recommended Fares-Related Changes (1)

	2020 Projections – No Changes to Fare Structure or Rate (3)	2020 Projected Change - 2.75 Flat Fare, Increase in HS Ticket Cap, and Changes to Card Fees	Est. 2020 Total Revenue Impact - \$2.75 Flat Fare, Increase in HS Ticket Cap, and Changes to Card Fees
KC Metro Service Fare Revenue	\$160,727,000	\$3,488,000	\$164,215,000
Seattle CMC Service Fare Revenue (2)	\$12,334,000	\$268,000	\$12,602,000
Seattle’s Community Mobility Contract Fare Credit (2)	(\$12,334,000)	(\$268,000)	(\$12,602,000)
HS Ticket Cap (4)	(\$3,600,000)	(\$400,000)	(\$4,000,000)
RRFP Administrative Fee	\$75,000	(\$75,000)	\$0
Youth/Adult Card Fee (5)	\$1,587,000	(\$700,000)	\$887,000
Estimated Net Revenue	\$158,789,000	\$2,313,000	\$161,102,000
Estimated 2020 Farebox Recovery	25.9%	0.3%	26.2%

1. *Projections - Actual revenue and farebox recovery amounts depend on actual ridership, economic conditions, fuel prices, etc.*
2. *King County Metro provides transit service to the City of Seattle under a Community Mobility Contract (CMC). Metro operates the service and the City of Seattle reimburses King County for 100% of the operating costs for this service. However, the payment due to King County is reduced by the fare revenue earned on the City of Seattle CMC service. The proposed \$2.75 fare simplification measure would increase fares on City of Seattle routes, but would also result in a reduction of the funds owed to Metro for the operating service, resulting in a net zero impact on Metro.*
3. *The fiscal impact to revenue shown here is the variance from current state (i.e., current fare structure and fare rate carried into the future years). The 2017/2018 adopted budget anticipated a fare increase in 2020, which would have generated \$12-15 million additional revenue per year. Therefore, while fare simplification generates some additional revenue per year, it is less than would be generated from an across-the-board fare increase. Metro will regularly evaluate farebox recovery to identify the need for a fare increase in the future.*

4. *The amount of revenue loss illustrated here is the maximum revenue loss anticipated as it assumes that all new trips taken with tickets purchased with the increased subsidy amount would be taken even without the increase in the subsidy.*
5. *These numbers are estimates of 2016 impacts and are not adjusted to reflect 2020 projections*

Overall, based on current assumptions for expenses and revenue, Metro estimates that, in 2020, the proposed fare changes would result in a net revenue gain of \$2,313,000 over revenue projections without any fare increases. This change would also result in \$9-12 million less fare-related revenue than planned in the 2017-2018 adopted budget associated with a 25 cent fare increase in 2020. The adopted budget assumptions of the current fare structure and a fare increase in 2020 would have resulted in an estimated farebox recovery of 27.5 percent in 2020. As always, farebox recovery depends on many factors including ridership, economic conditions, future service changes, wages and benefits, fuel prices, and others. Metro will monitor these factors and consider fare increases with biennial budget cycles as needed to maintain recovery rates above the floor.

Additional Recommendations to Improve Access and Affordability

Metro remains committed to making transit accessible for everyone. In particular, we want to address the barriers to transit for King County’s populations with the greatest needs. The proposed fare change would *not* impact the low-income riders who participate in ORCA LIFT or those who participate in the senior/disabled and youth fare programs. However, it would result in a \$0.25 increase to off-peak fares, potentially affecting many riders who may not be currently participating in any of Metro’s existing programs to increase affordability and access..

Table 3 outlines Metro’s current and planned actions to reduce affordability barriers for low-income and off-peak riders. The responses to the provisos relating to ORCA card fees and the feasibility of a very-low-income fare, provided with this report, explain these actions further.

Table 3: Actions to Benefit Low-Income and Off-Peak Riders

Objective	Action
<i>Relating to King County Council proviso on card fees</i>	
Reduce cost of card fees	<ul style="list-style-type: none"> • Work with ORCA partners via ORCA Joint Board to consider reducing adult card fees from \$5 to \$3 • Would provide a small financial benefit to all youth and full-fare adult riders using ORCA. Cards for ORCA LIFT recipients and their children would remain free. As is always the case, transit costs have a greater cost-burden on lower-income populations. • Would also help increase ORCA market share, which would help speed boarding and increase safety
<i>Relating to King County Council proviso on the feasibility of a very-low-income fare</i>	
Increase ORCA LIFT enrollment, which offers a \$1.50 reduced fare for adults below	<ul style="list-style-type: none"> • Provide information to the 40% of the 120 human service agencies that indicated they want more information about ORCA LIFT for clients • Use new tools:

<p>200% of the federal poverty level</p>	<ul style="list-style-type: none"> - Appendix 2, “How to pay for your ride with your ORCA card” infographic explains the difference between e-purse and monthly pass (now included in LIFT welcome packet) - Launch “What is an ORCA card and how do you use it?” videos in fall 2017 • Work to address barriers identified by community-based organizations who work with hard-to-reach populations • Consider developing a general “How to Use ORCA” campaign to increase ORCA and ORCA LIFT market share • Expand outreach about ORCA LIFT re-enrollment by notifying customers through mail, email, and posters • Promote \$0 ORCA card fee for youth (ages 6-18) of ORCA LIFT recipients • Utilize online verification system for re-enrollment • Provide additional translations of ORCA LIFT materials
<p>Increase subsidy cap for the Human Services Ticket Program to ensure agencies can purchase more tickets and better serve their clients</p>	<ul style="list-style-type: none"> • Increase subsidy cap for the Human Services Ticket Program by \$400,000, bringing total to \$4 million, in 2018 <ul style="list-style-type: none"> - 2017 survey of participating human service agencies indicated that agencies wanted and could spend more on additional tickets - Metro proposes increasing subsidy by \$400,000, or 11%, to address demand • Subsidy increase will help offset impacts of off-peak fare increase on agencies, which will increase the average human services ticket cost by approximately 2%
<p>Pilot - Streamline Human Services Ticket Program</p>	<ul style="list-style-type: none"> • Work with key agencies to design and implement a pilot program to test use of ORCA fare media to improve the Human Services Ticket Program
<p>Learn more about very-low-income and off-peak riders (and strategies for addressing needs)</p>	<ul style="list-style-type: none"> • Further evaluate results of pilot programs • Research needs of off-peak riders (especially those lower-moderate income riders who are most negatively impacted by the \$0.25 fare increase), very-low-income riders, youth, cash riders and others to address barriers to affordability and find solutions that expand access to our system for the most vulnerable populations in Phase 2 of Metro’s Fare Work Program • Consider all options available to very-low-income riders as part of Next Generation ORCA
<p><i>Other Related Efforts</i></p>	
<p>Help increase affordability and access to transit for college students (many of whom ride off-peak)</p>	<ul style="list-style-type: none"> • Consistent with emphasis on equity and social justice in community partnerships, Metro plans to pursue the options outlined above to increase equitable access among college students and encourage participation in ORCA LIFT and other programs for which they qualify. • Partner with students, colleges, and jurisdictions to continue to explore enhancements to college programs for students that meet the needs of individual schools/student populations <ul style="list-style-type: none"> - Metro has reached out to students and administrators at Seattle Community Colleges and Highline Community College about the possibility of developing

	<p>a passport program, similar to U-PASS, and will reach out to other colleges in King County</p> <ul style="list-style-type: none"> - Metro will work with schools to explore other options as needed • Coordinate with colleges for ORCA LIFT and ORCA-to-Go outreach to help low-income students use ORCA LIFT <ul style="list-style-type: none"> - Between March of 2015 and June of 2017, Metro has enrolled more than 1500 students for the ORCA LIFT program through its college outreach. - Metro has held 55 events at colleges in 2017 and will continue to work with colleges to plan events into the fall and the beginning of each new quarter. - Starting fall 2017, colleges will have their own schedule on the website for students that will clearly show when ORCA-to-Go and Public Health will be on campus and it will also direct them to the closes LIFT enrollment site. - Metro and Public Health created ongoing outreach and enrollment strategies for the University of Washington students that included enrolling students not eligible for the U- Pass, their summer programs for low-income residents, (e.g. Upward Bound, Girls in Science and Bio-engineering Camp). Fall enrollment event scheduled. - North Seattle College has enrollment assistance available four days per week at the Opportunity Center for Employment & Education building. - Seattle Central College continues to lead the way in LIFT enrollments. Weekly LIFT enrollment location and referral process set up through the women’s program. Fall enrollment event scheduled. - Metro also provides materials about ORCA LIFT, including posters, electronic posters, and brochures, to schools so they can distribute them to students. - Reached out to colleges to develop and train staff at the colleges to enroll their own students. We’ll continue to recruit college personnel.
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Overview of Public Engagement

Metro began an extensive public engagement program related to fares in March 2017, going beyond what we traditionally do for public outreach and what we have done for any other fare change. Metro’s public engagement efforts are designed to meet multiple goals – including goals of providing the opportunity for members of the public to shape a decision with their opinions, demonstrating transparency, building public awareness, and helping elected officials understand qualitative opinions of those they serve. Public engagement programs are not fully representative of all Metro riders because they depend on individuals to opt-in to the conversation.

In this particular engagement program, we worked to solicit feedback from the public, community members involved in transit, people with low incomes, limited English-speakers (LES), and other populations less likely to respond to online surveys. Metro hoped to learn more about our customers’ preferences, transit use habits, and barriers they may face to access to transit. We used several tactics throughout our engagement program, including but not limited to public online surveys, an employer survey, a stakeholder advisory group, outreach through community-based organizations, public open houses, briefings of key stakeholder groups and elected officials, and street teams.

We gathered feedback on our current fare structure and potential changes. One-third of responses to Metro’s first public survey indicated riders felt Metro’s current structure is confusing. Eighty percent of

responses to Metro's second public survey said riders liked a flat fare. Metro learned a lot of valuable information about the needs of our customers related to fares and will continue working to improve our processes so we can learn more about how our customers can equitably and affordably access our system in Phase 2 of the fares work program. As the County's Office of Equity and Social Justice expands the use and application of equity tools, Metro will adopt these tools and insights to improve our public engagement processes.

For a comprehensive description of our public engagement effort and what we heard, see Appendix 4, "Public Engagement Processes," in this report and the Public Engagement Report, Attachment D in this legislative package.

Next Steps and Preparation for Phase 2 of the Fares Work Program

The ORCA agencies plan to move forward with an RFP for a Next Generation ORCA vendor in fall 2017. Given that timeline, Metro needs the King County Council to adopt the \$2.75 flat fare structure by the end of 2017 to inform system design. Metro also recommends implementing this fare structure on July 1, 2018 to simplify fares as early as possible to make fares easier for customers to use and understand.

Metro intends to build on our experiences and lessons learned in the first phase of this fares work program to find ways to speed boarding, increase safety, and more equitably serve King County residents with the greatest needs with Phase 2 of the fares work program. Metro looks forward to partnering with the Office of Equity and Social Justice and using the Equity Impact Review tool when considering ways to reduce affordability barriers and improve our system.

Many of Metro's current actions and programs will help inform recommendations made in Phase 2 of the Fares Work Program. For example, Metro is providing free ORCA cards and a \$0.50 reduced ORCA fare to King County Youth from June 17 to September 4, 2017 as part of a "Reduced ORCA Summer Youth Fare" pilot program. This demonstration program aims to increase mobility among youth and bring more youth into the transit system. Metro will evaluate this program and consider its continuation, in addition to applying lessons learned about youth riders to actions taken in Phase 2. In the summer of 2018, Metro will also implement a pilot program that would provide certain students in the Highline and Lake Washington school districts with a free ORCA card during the summer using \$250,000 appropriated to King County by the state of Washington during the 2017 legislative session. Additionally, we will further research to analyze options and work to find solutions that meet the needs of very-low-income riders, off-peak riders, youth, cash riders, and college students.

Metro has started conversations with operators about ways to improve safety and speed boarding. Metro is also conducting a mobile ticketing pilot program, for evaluation in fall 2017. Metro is following up with community-based organizations about information acquired during Phase 1 outreach and discussing opportunities for continued partnership. We are also developing plans for research that will delve deeper into issues of speeding boarding, increasing safety, and reducing affordability barriers. Finally, Metro will review the fares of other services, including Access, and examine eliminating paper transfers and other ways to increase ORCA market share.

Appendix 1: Summary of Recommendations in Phase 1 of Metro's 2017-2018 Fares Work Program

Project	Description	Target Market
Fare Simplification (transmitted via ordinance)	<ul style="list-style-type: none"> • Recommend a \$2.75 flat fare, for implementation on July 1, 2018, to be transmitted to Council in mid-August (eliminates surcharges for zone and peak- period travel) <ul style="list-style-type: none"> – Impacts: \$0.50 decrease for 2-Zone Peak, \$0.25 increase for off-peak, no change for 1-Zone Peak – Objectives: simplify fares to improve customer experience, better coordinate with regional partners, increase safety and security, speed boarding – Outcomes: Makes system easier for customers to use and understand. Prepares for efficiencies in Next Generation ORCA. Better coordinates with regional partners. Increases safety and speeds boarding by reducing confusion and disputes with operators. Increases affordability for many. Does not reflect cost of service as well as peak surcharge 	Full fare adult riders, business accounts (no change to ORCA LIFT, youth, senior/disabled fares)
Very-Low-Income Fare Proviso (transmitted via motion and ordinance)	<ul style="list-style-type: none"> • Analysis of implementing a “very low income fare” via proviso, response transmitted via motion and ordinance in mid-August (with simplification package) • Recommendations include: <ul style="list-style-type: none"> – Expand partnerships with human service agencies to help them better serve very-low-income clients by increasing ticket program subsidy cap by \$400,000 in 2018 – Launch pilot program to test use of ORCA products in Human Services ticket program in 2018 – Continue evaluating pilot programs and researching needs of and potential strategies for helping very-low-income residents 	“Very-low-income” riders —especially those who cannot afford or access ORCA Lift, or reduced Youth and Senior/Disabled fares

Project	Description	Target Market
ORCA Card Fees Proviso (transmitted via motion and ordinance)	<ul style="list-style-type: none"> • Revised response transmitted via motion and ordinance in mid-August (with simplification package) • Recommendations include*: <ol style="list-style-type: none"> 1. Free RRFP card fees (including free replacements) King County only, for implementation in first quarter of 2018 2. Work with regional partners to reduce youth card fees from \$5 to \$3 (including replacements), for implementation in 2018 3. Work with regional partners to reduce adult fees from \$5 to \$3 (including replacements), for implementation in 2018 <p>*require regional decisions by ORCA partner agencies</p>	RRFP (senior/disabled) riders, youth riders, full fare adult riders (especially helpful to those who ride off-peak), and business accounts
College Student Program (referenced in ordinance package)	<ul style="list-style-type: none"> • In response to the Council’s “college student fare” proviso, Metro will continue to explore enhancements to college programs for students that better meet the needs of individual schools/student populations in collaboration with students, colleges, jurisdictions, and other stakeholders • Increase ORCA LIFT and ORCA-to-Go outreach to colleges and vocational schools 	College students (many of whom ride off-peak) —especially those who don’t qualify for LIFT
Increased ORCA LIFT Outreach (referenced in ordinance package)	<ul style="list-style-type: none"> • Use new tools like infographics and videos to increase enrollment among English language learners (currently 48,000 customers out of new target of 66,000 – 86,000 likely riders) • Provide human service ticket agencies with more information about ORCA LIFT for their clients • Address issues identified through outreach with community-based organizations and continue other efforts to increase enrollment 	LIFT eligible adults (under 200% of federal poverty level)
Continued Evaluation of Fares Program (referenced in ordinance package)	<ul style="list-style-type: none"> • Evaluate pilot programs, such as the summer 2017 \$0.50 reduced youth ORCA fare (plus a free ORCA card), and further research needs of very-low-income riders, off-peak riders, youth, and college students • Examine other ways to speed boarding, increase safety, and increase affordability • Examine eliminating paper transfers and other potential ways to increase ORCA market share • Review fares of other services (Rideshare, Access, Custom Bus, etc.) 	Very-low-income riders, off-peak riders, youth, college students, cash riders

Appendix 2: “How to pay for your ride with your ORCA card” Infographic

How to pay for your ride with your ORCA card



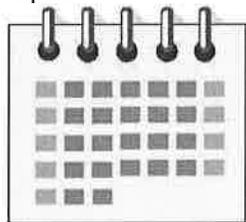
E-purse

- Is short for electronic purse
- Value from \$5 up to \$300 can be loaded onto an ORCA card E-purse
- E-purse holds funds to be used like cash to pay the fare like a Debit Card
- Holds your money like a purse, take it out as you need it and unused funds roll over to the next month



Regional Monthly Pass

- A pass that allows travel on transit services in the region for a specified month
- Good for people who ride the bus more than 36 trips for 18 round trips per month
- Allows you to have unlimited rides for a calendar month up to the trip value of the pass
- The cost of a pass is determined by the fare you normally pay, if your fare is \$1.50 you would buy a \$54 pass, if your fare is \$2.50 you would buy the \$90 pass



Cómo pagar su pasaje con su tarjeta ORCA



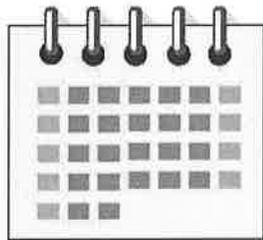
E-purse

- Término abreviado que significa monedero electrónico
- se puede cargar la cantidad de \$5 hasta \$300 en el E-purse de una tarjeta ORCA
- El E-purse guarda fondos para pagar tarifas en lugar de dinero en efectivo, tal como una tarjeta de débito
- Guarda su dinero como un monedero y permite sacar lo necesario según sus circunstancias; los fondos que restan se quedan para el siguiente mes.



Pase Regional Mensual

- Un pase que permite viajar mediante servicios de tránsito en la región por un mes específico
- Válido para personas que usan el autobús más de 36 veces o 18 viajes redondos por mes
- Permite hacer viajes ilimitados por un mes calendario hasta el valor nominal del pase
- El costo de un pase es determinado por la tarifa que paga normalmente; si su tarifa es \$1.50 compraría un pase de \$54; si su tarifa es \$2.50, compraría el pase de \$90.



Spanish

Appendix 3: Comparison of Original Five Fare Change Options

	\$2.50 Flat Fare	\$2.75 Flat Fare	\$2.50 Local, \$3.25 Express	\$2.75 Peak Fare	\$3.00 Peak Fare
Policy	Eliminate the zone and peak surcharges. Adult riders pay the current \$2.50 adult base fare to travel anywhere and anytime	Eliminate the zone and peak surcharges. Adult riders pay \$2.75 to travel anywhere and anytime	\$2.50 Local fare for slower routes serving shorter trips and a \$3.25 Express fare for routes that provide faster service	A \$2.50 base adult fare with a \$0.25 surcharge for adult fares during peak commute hours (6-9am and 3-6pm), based on trip schedule	A \$2.50 base adult fare with a \$0.50 surcharge for adult fares during peak hours, based on trip schedule
Rationale	<ul style="list-style-type: none"> • Easy to understand 	<ul style="list-style-type: none"> • Easy to understand 	<ul style="list-style-type: none"> • Reflect cost of service • Somewhat easier to understand 	<ul style="list-style-type: none"> • Reflect cost of service • Provides modest disincentive for discretionary peak travel 	<ul style="list-style-type: none"> • Reflect cost of service • Provides modest disincentive for discretionary peak travel
2020¹¹ Revenue Impact	\$\$\$ Decrease of more than \$9 million	\$ Increase of \$3.5-4 million	\$ Decrease of less than \$2 million/year	\$\$ Decrease of \$2-5 million/year	\$ Increase of \$3.5-4 million
Impact on Adult Fares	<ul style="list-style-type: none"> • Off-peak: no change • 1-Zone Peak: \$0.25 decrease • 2-Zone Peak: \$0.75 decrease 	<ul style="list-style-type: none"> • Off-peak: \$0.25 increase • 1-Zone Peak: no change • 2-Zone Peak: \$0.50 decrease 	<ul style="list-style-type: none"> • Off-peak riders on local routes pay the same • 1-Z (2-Z) Peak riders on Local routes pay \$0.25 (\$0.75) less • 2-Z Peak riders on express routes pay the same Off-Peak --(1-Z Peak) riders on Express routes pay \$0.75 (\$0.25) more 	<ul style="list-style-type: none"> • Off-peak: no change • 1-Zone Peak: no change • 2-Zone Peak: \$0.50 decrease 	<ul style="list-style-type: none"> • Off-peak: no change • 1-Zone Peak: \$0.25 increase • 2-Zone Peak: \$0.25 decrease

¹¹ All revenue estimates in Appendix 3 only reflect impacts of fare simplification. They do not reflect impacts of other proposals in this package that influence revenue, such as recommended changes to ORCA card fees and the Human Services Ticket Program.

	\$2.50 Flat Fare	\$2.75 Flat Fare	\$2.50 Local, \$3.25 Express	\$2.75 Peak Fare	\$3.00 Peak Fare
Regional Coordination	Aligns fare structure with ORCA partners	Aligns fare structure with ORCA partners	Aligns fare structure with ORCA partners. CT Commuter fares \$4.25/\$5.50, ST \$2.75/\$3.75	Metro would remain only ORCA agency with time-of-day pricing	Metro would remain be only ORCA agency with time-of-day pricing
Relation to other key goals	<ul style="list-style-type: none"> • Decreases disputes and improves safety • Speeds up boarding • Preps for Next Gen. ORCA • Does not reflect cost of service 	<ul style="list-style-type: none"> • Decreases disputes and improves safety • Speeds up boarding • Prep for Next Gen. ORCA • Does not reflect cost of service 	<ul style="list-style-type: none"> • Simplifies fares somewhat – 1 adult fare by route 	<ul style="list-style-type: none"> • Does not fully simplify fares • Reflects cost of service • Complicates Next Gen ORCA system design 	<ul style="list-style-type: none"> • Does not fully simplify fares • Reflects cost of service • Complicates Next Gen ORCA system design • Does not align with regional partners

Appendix 4: Public Engagement Processes

Public Engagement – Phase 1

Metro began an extensive public engagement program related to fares in March 2017, going above what we traditionally do for public outreach and what we have done for any other fare change. Metro's public engagement efforts are designed to meet multiple goals – including goals of providing the opportunity for members of the public to shape a decision with their opinions, demonstrating transparency, building public awareness, and helping elected officials understand qualitative opinions of those they serve. In this particular engagement program, we worked to solicit feedback from the general public, community members involved in transit, people with low incomes, English language learners (ELL), and other populations less likely to respond to online surveys. We gathered feedback on our current fare structure and potential changes. Metro hoped to learn more about our customers' preferences, transit use habits, and barriers they may face to access to transit. Public engagement programs are not fully representative of all Metro riders because they depend on individuals to opt-in to the conversation. For a comprehensive description of our public engagement effort and what we heard, see the Public Engagement Report, Attachment D in this legislative package.

Metro conducted an online survey of the general public concerning our current fare structure¹². We engaged a Fare Stakeholder Advisory Group, representing a range of perspectives, and contracted with community-based organizations to conduct outreach with low-income populations, some communities of color, limited English-speaking populations, some immigrant and refugee communities, and other harder-to-reach populations. We also began a series of stakeholder interviews and briefings.

Through our stakeholder interviews and first public survey, we received feedback, which informed the development of the five initial options Metro considered for fare simplification. One-third of the 4,487 responses indicated riders find it difficult or very difficult to understand Metro's fares. In addition to simplification, respondents want us to prioritize improving affordability for low-income customers, increasing ridership, speeding board, and improving safety for customers and operators. For more detail about Metro's survey results and outreach, see the Public Engagement Report, Attachment D in the legislative package.

We learned a lot from this public outreach process about the needs of our customers related to our fare structure and also about some things we could do more effectively in future processes. Metro will incorporate these learnings into the second phase of our fares program to better understand the needs and limitations of our customers in equitably accessing and affording our system. As the County's Office of Equity and Social Justice expands the use and application of equity tools, Metro will adopt these tools and insights to improve our public engagement processes.

Five Initial Options

Using public feedback, our policy guidelines, and recommendations from the Forum, we developed five initial fare change options:

- **\$2.50 Flat Fare:**
 - Would eliminate the zone and peak-period surcharges and make our current base adult fare, \$2.50, the fare for all travel – no matter time of day or distance
 - Would simplify fares, align our fare structure with regional partners, increase safety, increase affordability for some riders, and speed travel time
 - Would not reflect the cost of service as well as some of the other options

¹² Since respondents opted in to taking the survey, and there is some selection bias, it is not representative of all riders

- Would result in a revenue decrease of more than \$9 million in 2020 as compared to that anticipated with no change to the fare structure or rate
- **\$2.75 Flat Fare:**
 - Would eliminate zone and peak-period surcharges and increase base adult fare by \$.25 (to \$2.75)
 - Would simplify fares, align Metro’s fare structure with regional partners, increase safety, and speed travel time
 - Would not reflect the cost of service as well as other options
 - Would increase affordability for some riders by giving two zone peak riders a \$0.50 decrease
 - Would decrease affordability for some riders by raising fares for off-peak riders by \$0.25
 - Would result in a revenue fare increase of \$3.5-\$4 million in 2020 as compared to that anticipated with no change to the fare structure or rate
- **Local and Express Fares:**
 - Would eliminate the zone and peak-period surcharges by creating two new fare categories – “local” and “express.” Metro would charge \$2.50 on local routes (slower service, shorter trips), and \$3.25 on express routes (faster service, longer trips)
 - Would better reflect the cost of service
 - Elements would be simpler, but having both local and express routes use the same bus stops could lead to confusion
 - Could result in disputes between drivers and passengers
 - Would result in a revenue decrease of less than \$2 million in 2020 as compared to that anticipated with no change to the fare structure or rate
- **Peak Fare – \$2.75 peak/\$2.50 off-peak:**
 - Would eliminate the zone surcharge while maintaining the peak surcharge
 - Would charge \$2.75 for peak trips and \$2.50 as the base adult fare
 - Would better reflect the cost of service
 - Would not simplify Metro’s fare structure and align it with regional partners as completely as some other options
 - Would not increase safety or speed boarding as much as some of the other options
 - Would result in a 2020 revenue decrease of \$2-5 million as compared to that anticipated with no change to the fare structure or rate
- **Peak Fare – \$3.00 peak/\$2.50 off-peak:**
 - Would eliminate the zone surcharge while maintaining the peak surcharge
 - Would increase the peak fare to \$3
 - Would maintain a \$2.50 base adult fare
 - Would better reflect the cost of service
 - Would not simplify Metro’s fare structure and align it with regional partners as completely as some other options
 - Would not increase safety or speed boarding as much as some of the other options
 - Would result in a 2020 revenue increase of \$3.5 million–\$4 million as compared to that anticipated with no change to the fare structure or rate

For a complete breakdown of the policy rationale for and impacts of each initial proposal, see Appendix 3: Comparison of Original Five Fare Change Options.

Metro developed, analyzed, and reviewed these options. There was concern that the \$2.50 flat fare would not be feasible because of the \$9 million expected decrease in revenue (which would fund almost 82,000 service hours in 2020, assuming a projected cost per hour for 2020). The “\$2.75 Peak Fare Low” option was expected to result in moderate fare revenue loss and was seen as less effective in reflecting the cost of service and incentivizing off-peak travel than the “\$3 Peak Fare High” option.

There were also a number of important concerns about the “Local and Express Fare” option. First, the routes are difficult to categorize. Many also raised concerns about the fairness of this option, given the suburbanization of poverty. Census data confirms that many likely riders on the more expensive express routes would be riders of modest incomes who may have been forced to outlying areas because of Seattle’s lack of affordable housing problem. As mentioned earlier, King County has experienced a significant shift in poverty to the suburbs over the last two decades.

We also heard feedback that having different routes with different rates serving the same areas – and in some cases, using the same bus stops – might lead to confusion and conflict. Some express routes provide local service before or after beginning the “express” portion of their route. Implementing express routes in those areas would require us to eliminate those “local tails” and cut or figure out a new way to provide that service. Lastly, this option is not in line with Metro Connects. As a result, we asked the public for input on the \$2.75 flat fare and the \$3 peak-period fare.

The Final Two Options

The \$2.75 flat fare option would eliminate both the peak-commute period pricing and the surcharge for crossing a zone boundary. The \$3 peak/\$2.50 off-peak fare would eliminate the zone pricing but keep the trip-based peak surcharge.¹³ We brought these options to the public as possible alternatives to our current fare structure. Table 4 summarizes their impacts:

¹³ Metro chose to base peak-period pricing on trip schedules, as we currently do, instead of time, after receiving feedback from drivers who felt a time-based approach would create significant operational issues and increase the potential for disputes.

Table 4: Summary of Options

Option 1: \$2.75 Flat Fare	Option 2: \$3.00 Peak/\$2.50 Off-Peak Fare
<p>Description</p> <ul style="list-style-type: none"> No zone and peak category – travel any time, any distance for \$2.75 <p>Features</p> <ul style="list-style-type: none"> Easy for customers to understand Speeds boarding and operations Minimizes interactions with operators Does not reflect cost of service as well as peak surcharge <p>2020 Revenue*</p> <ul style="list-style-type: none"> Minor net increase (\$3.5 million - 2.1%) <p>2020 Ridership</p> <ul style="list-style-type: none"> Minor decrease (0.4 million -0.3%) <p>Rider Impacts</p> <ul style="list-style-type: none"> Off-Peak: \$0.25 fare increase 1-Zone Peak: no change 2-Zone Peak: \$0.50 fare decrease <p>Title VI Impacts</p> <ul style="list-style-type: none"> Will bring the average fare paid by regular adult riders on low-income and minority routes in line with the average fare on non-low-income and non-minority routes Decrease for 2-Zone Peak riders on routes with a higher percentage of boardings in low-income or minority census tracts Will raise fares for off-peak riders <ul style="list-style-type: none"> - Full-fare adult off-peak boardings represent approximately 35 percent of total boardings - 21 percent of total boardings are off-peak-only full-fare adults paying their own fare 	<p>Description</p> <ul style="list-style-type: none"> No zone category, keep trip-based peak surcharge <p>Features</p> <ul style="list-style-type: none"> Metro would be the only ORCA agency with peak pricing Reflects Cost of Service Does not fully simplify fares <p>2020 Revenue*</p> <ul style="list-style-type: none"> Minor net increase (\$3.3 million – 2%) <p>2020 Ridership</p> <ul style="list-style-type: none"> Minor decrease (0.2 million -0.1%) <p>Rider Impacts</p> <ul style="list-style-type: none"> Off-Peak: no change 1-Zone Peak: \$.25 fare increase 2-Zone Peak: \$0.25 fare decrease <p>Title VI Impacts</p> <ul style="list-style-type: none"> Will bring the average fare paid by adult riders on low-income and minority routes in line with the average fare on non-low-income and non-minority routes Will raise fares for 1-Zone Peak riders (people riding during peak commute period within Seattle)

* Assuming fare change implemented no later than March 2019, exclude Seattle Community Mobility Contract revenue.

Both options have very similar revenue and ridership implications. Therefore, other key policy goals—including simplification, preparation for Next Generation ORCA, safety, travel time, regional coordination, and affordability—factored significantly into Metro’s decision.

As required by the FTA Title VI equity analysis, Metro compared estimated boardings by full-fare adult riders paying with cash, E-purse or retail passes on minority and non-minority and low-income and non-low-income routes. As provided in King County Metro’s Service Guidelines, adopted by the County Council, Metro uses census tract demographics and boardings to classify corridors as low-income, minority, or both. A census tract is defined as low-income if the low-income percentage of the population in that tract is greater than the average in King County (23.9 percent)¹⁴. Similarly, a census tract is defined as minority if the minority percentage of the

¹⁴ Metro uses 200% of the Federal Poverty Level or lower, consistent with the income guideline established in the King County Code for the ORCA LIFT program.

population in that tract is greater than the average in King County (37.2 percent). Routes with a higher percentage of boardings in low-income or minority census tracts than Metro's corresponding system averages are defined as low-income or minority routes.

Under our current fare structure, the average full-fare adult fare paid on low-income and minority routes is higher than that on non-low-income and non-minority routes. The \$2.75 flat fare would eliminate that disparity. The \$3 peak/\$2.50 off-peak fare structure would significantly reduce it. Riders on two-zone, peak routes would see the most immediate benefit under both options, but the benefit is greater under the \$2.75 flat fare option. The impact on those two-zone peak riders is especially important considering the suburbanization of poverty. The \$2.75 flat fare option would be easier to understand, thus also likely benefitting riders who speak limited English.

Public Engagement Phase 2

Metro launched our second online public survey in April asking for input about those two fare change proposals. We also continued our contracted outreach with community-based organizations, including World Relief, Hopelink, and White Center Community Development Association. Additionally, Metro presented to various elected officials, our Advisory Group, and various transportation boards.

Metro received 6,496 responses to our second public online survey¹⁵. 80 percent of responses said indicated they liked the \$2.75 flat fare option (strongly or somewhat agree), compared with 28 percent of respondents who liked the \$3 peak/\$2.50 off-peak option. Our employer survey garnered 183 responses – 67 percent of which thought a \$2.75 flat fare would make it easier to manage their transportation benefit account with Metro. Taken together, these responses provided considerable support for the \$2.75 flat fare option.

The Public Engagement Report, Attachment D in this legislative package, includes more information about Metro's promotion of the survey, survey results, and additional outreach.

¹⁵ Since respondents opted in to taking the survey, and there is some selection bias, it is not representative of all riders

Title VI Review of King County Metro’s Proposed 2018 Fare Simplification - \$2.75 Adult Fare

FTA Circular 4702.1B, issued on October 1, 2012, identifies “Title VI Requirements and Guidelines for Federal Transit Administration Recipients.” The following sections outline requirements with regards to evaluating proposed fare changes.

7. **REQUIREMENT TO EVALUATE SERVICE AND FARE CHANGES.** This requirement applies only to transit providers that operate 50 or more fixed route vehicles in peak service and are located in a UZA of 200,000 or more in population or that otherwise meet the threshold in the Introduction section of this chapter. These transit providers are required to prepare **and submit service and fare equity analyses** as described below. Transit providers not subject to this requirement are responsible for complying with the DOT Title VI regulations which **prohibit disparate** impact discrimination, and therefore should review their policies and practices to ensure their service and fare changes do not result in disparate impacts on the basis of race, color, or national origin. (Page IV-11)....

Upon completion of a service or fare equity analysis, the transit provider shall brief its **board of directors, top executive, or appropriate governing entity or official(s)** responsible for policy decisions regarding the service and/or fare change(s) and the equity impacts of the service and/or fare change(s). The transit provider shall submit documentation such as a board resolution, copy of meeting minutes, or similar documentation with the Title VI Program as evidence of the board or governing entity or official’s consideration, awareness, and approval of the analysis. (Page IV-12)

b. Fare Equity Analysis

(1) Fare Changes. The fare equity analysis requirement applies to all fare changes regardless of the amount of increase or decrease. As with the service equity analysis, FTA requires transit providers to evaluate the effects of fare changes on low-income populations in addition to Title VI-protected populations....

(2) Data Analysis. For proposed changes that would increase or decrease fares on the entire system, or on certain transit modes, or by fare payment type or fare media, the transit provider shall analyze any available information generated from ridership surveys indicating whether minority and/or low-income riders are disproportionately more likely to use the mode of service, payment type, or payment mediate that would be subject to the fare change. (Page IV-19)

The 2016 King County Metro Transit Title VI Program Report submitted and approved by the King County Council (Motion No. 14688) and submitted to and accepted by the Federal Transit Administration (FTA concurrence posted electronically on TrAMS, April 11, 2017) outlines the methodology by which Metro conducts fare equity analyses pursuant to the FTA's Title VI regulations.

The first step is a threshold analysis to determine whether a proposed fare change includes a change in the fare structure or a change in fares by fare payment type. If a proposed fare change involves an equal fare increase across all customer categories and an equal increase across all fare payment methods then the proposed change will not have a disparate impact or disproportionate burden and does not require further analysis. The current fare proposal does involve differential fare changes by customer category and therefore requires further analysis.

As described in King County Metro's Services Guidelines, adopted by King County Council Ordinance 18301, Metro uses census tract demographics and boardings to classify routes as low-income, minority, or both. A census tract is low-income if the percent of the population in that tract that is low income (at or below 200% of the Federal Poverty Level) is greater than the average in King County (23.9%). A census tract is minority if the percent of the population in that tract that is minority is greater than the average in King County (37.2%). Minority and low-income census tracts are shown in Figure A-1.

Similarly, routes with a higher percentage of boardings in low-income or minority census tracts than Metro's corresponding system averages are defined as low-income or minority routes. Figure A-2 shows Metro's minority and low-income routes.

To assess the equity impacts of this fare proposal, Transit first estimated boardings by full-fare adult riders paying with cash, E-purse or retail passes on low-income, non-low-income, minority and non-minority routes. (Boardings made with employer-provided Passport passes were excluded from this analysis, as were boardings by ORCA LIFT, Youth and Senior/Disabled riders since these customers are not directly affected by this proposed fare change.) We then calculated and compared the average fare paid by full-fare adult riders on low-income routes with non-low-income routes, and by full-fare adult riders on minority routes with non-minority routes.

Under Metro's current fare structure, the average fare paid by full-fare adult riders (without employer provided passes) on low-income routes is slightly higher (two cents) than the average full adult fare paid by riders on non-low-income routes. Similarly, the average fare paid by full-fare adult riders on minority routes is somewhat higher (five cents) than the average full adult fare paid by riders on non-minority routes.

Metro's proposal to simplify fares by implementing a \$2.75 adult flat fare for all times of day throughout King County would eliminate these disparities, and therefore would not result in disproportionate or disparate impacts.

Figure A-1: Minority and Low-Income Census Tracts

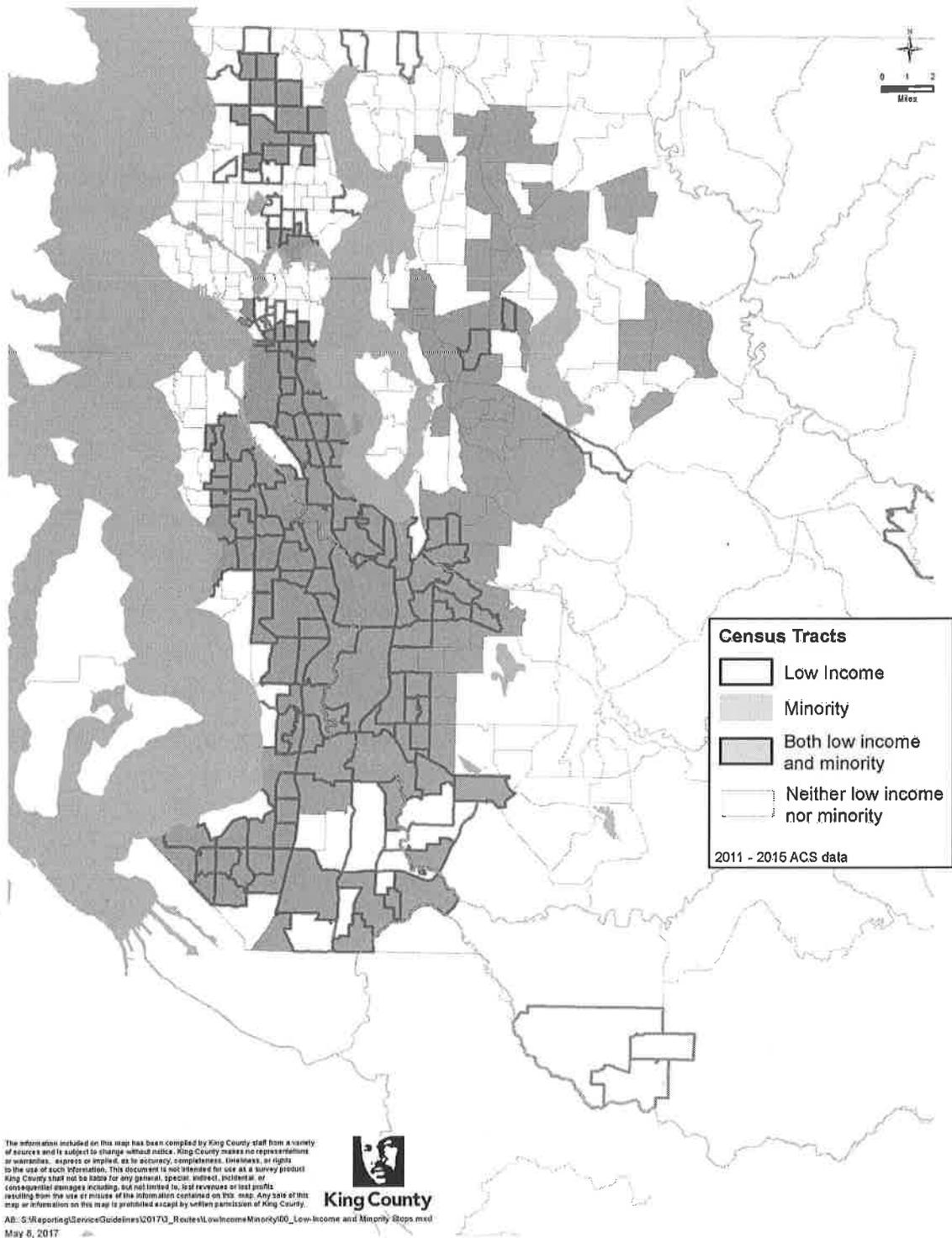
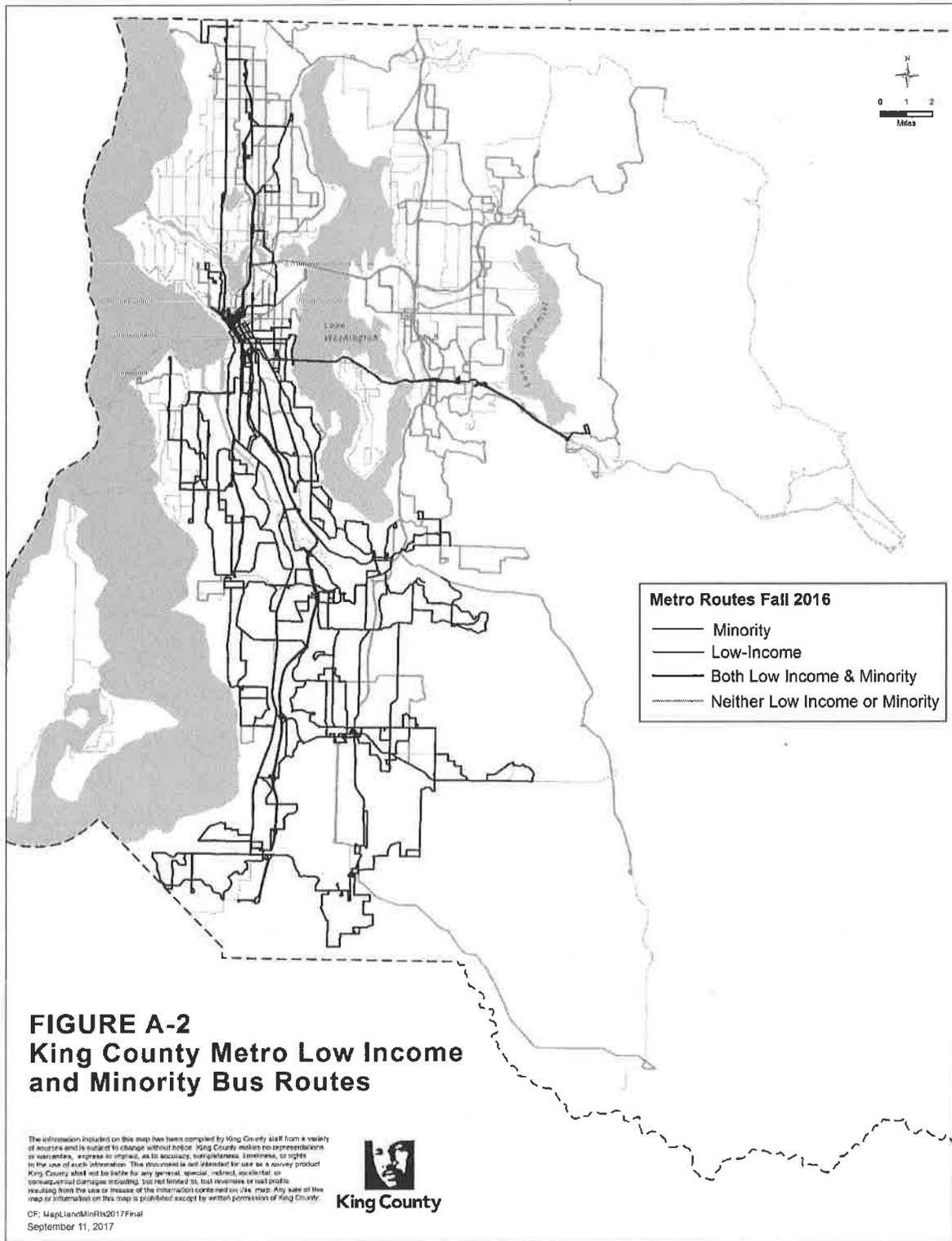


Figure A-2: Metro's Title VI Low-Income and Minority Routes





Metro Fare Review

Public Engagement Report

Prepared by

King County Department of Transportation Communications

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Executive Summary

While considering options for fare simplification, Metro conducted an intensive public engagement process between March and June 2017. The purpose was to involve those who could be affected by fare changes and those who interact with our fare payment system. We asked them to help shape fare simplification and longer-term work program goals:

- Coordinate with regional partners and prepare for Next Generation ORCA
- Improve safety for operators and customers
- Speed up operations
- Increase affordability and advance equity and social justice

This outreach informed Metro's recommendation to simplify its adult fare structure by moving to a \$2.75 flat fare, regardless of trip time or whether a trip crosses a zone boundary. In addition to making fares easier for customers to use and understand, this change would help Metro achieve the goals of its work program.

Metro recruited and facilitated a stakeholder advisory group, briefed and interviewed interested groups, conducted two rounds of feedback gathering from the general public, and contracted with community-based organizations to involve the general public, diverse community members, people with low incomes, English language learners, and other populations less likely to respond to online questionnaires. In total, we received more than 12,000 comments either directly in face-to-face outreach activities or through online questionnaires.

At each phase of public outreach, opportunities to give feedback were promoted through print, radio, and television news; Twitter, Facebook, transit alerts, coach posters, street teams, and a network of stakeholders.

First phase of public engagement: how is fare payment working now, what we should prioritize moving forward

From March 23 through April 7, we solicited input in our first online questionnaire and received important feedback:

- One-third of the 4,487 responses indicate that survey responders find it difficult or very difficult to understand Metro's fares.
- Eighty percent indicated the cost to ride is currently affordable.

- Responses from survey responders who indicated they pay their fare with cash said they do so because of infrequent use of our services, ease of paying with cash, lack of desire to pay the card fee, and lack of convenient locations to find or load an ORCA card.
- In addition to simplification, responses indicated that survey responders want us to prioritize improving affordability for low-income customers, increasing ridership, speeding board, and improving safety for customers and operators.

Five initial fare change options developed in response to feedback

Using public feedback from the online questionnaire, stakeholder advisory group, and briefings with interested groups; our policy guidelines; and recommendations from a Regional Fare Forum of elected officials who serve on the ORCA joint board facilitated last fall, we developed five initial fare change options:

- \$2.50 flat fare
- \$2.75 flat fare
- Local and express fares
- Peak fare—low
- Peak fare—high

No changes were considered for youth, seniors, people with disabilities, or people who qualify for ORCA LIFT¹.

We gathered input from our stakeholder advisory group on the five initial options. The input and additional analysis helped us narrow these options down to two adult fare change options that we took to the public for feedback in a second phase of engagement.

Second phase of public engagement: feedback on two adult fare change options

In our second phase of engagement, we asked the public for input on the \$2.75 flat fare and a \$3 peak-period fare through another online questionnaire. Between April 19 and May 5, we solicited input via an online questionnaire, street teams, and two public meetings on the two options. We also invited employers who participate in employee pass programs to complete an online questionnaire.

¹ Children 6 years old or younger are not required to pay a fare; youth ages 7 to 18 qualify for a youth fare. People ages 65 and older qualify for a Regional Reduced Fare Permit, or senior fare. People with a disability certified by a medical professional qualify for a Regional Reduced Fare Permit, or disabled fare. People who are 200% or below the federal poverty level qualify for ORCA LIFT.

The questionnaire was completed nearly 6,500 times. Eighty percent of responses indicated survey responders like the \$2.75 flat fare option (strongly or somewhat agree), compared with 28 percent of responses indicating survey responders liked the \$3 peak/\$2.50 off-peak options. Our employer questionnaire garnered 183 responses; 67 percent thought a \$2.75 flat fare would make it easier to manage their transportation benefit account with Metro. In addition, feedback we received from people served by the community-based organizations we contracted with indicated a slight preference for a single, flat fare which was considered easier to understand. Taken together, these responses provided considerable support for Metro's recommendation to move with the \$2.75 flat fare option.

Continued briefings with interested groups, additional meetings with our stakeholder advisory group, and input received from outreach conducted by contracted community-based organizations provided input into additional research and other actions Metro is and will be taking over the next two years. These actions include making sure those who qualify for ORCA LIFT can easily become eligible and take advantage of the discount; improving our Human Services Ticket Program; and exploring Passport transit pass options that will make resources colleges and low income housing developments put towards subsidizing transit passes for students and residents go further. We are also committed to conducting more research to better understand the needs of people with no or very low income.

Next steps

Metro will reconvene our stakeholder advisory group later this summer to provide final details about what is being transmitted from the King County Executive to King County Council. We may continue to solicit input and assistance from stakeholder advisory group members, the community-based organizations we contracted with, and the general public as we conduct additional research and pilot programs that are planned for the next two years. As part of additional research, we will look more deeply where applicable at survey response data from this outreach by race, income, and primary language spoken at home to see if any distinctions in needs or preferences can be identified and further explored.

Outreach Plan and Activities

Overview

After the initiation of the Next Generation ORCA project and recommendations from elected officials representing ORCA agencies on a Regional Fare Forum, Metro began to develop a fares work plan for 2017-2018 that will include both work related to preparation for Next Generation ORCA and a more comprehensive assessment of a broader range of fare issues.

Through this work plan, Metro aims to:

- Simplify fares for customers
- Coordinate with regional partners and prepare for Next Generation ORCA
- Improve safety for operators and customers
- Speed up operations
- Increase affordability and advance equity and social justice

In the short-term, Metro focused on the first goal: to simplify fares. Direction from King County elected officials who participated in a Regional Fare Forum in fall 2016 was to look specifically at eliminating Metro's zone and peak surcharges. Eliminating these surcharges and simplifying Metro's fare structure would help bring Metro more in line with other ORCA participating agencies and would reduce the cost and complexity of designing the next iteration of ORCA.

We designed our engagement effort to:

1. Get input from stakeholders and the public on their preferences for simplifying Metro's fares to inform an ordinance on fare change options and inform additional, longer-term fare work program areas of focus that would increase ORCA usage and access to transit.
2. Build an understanding among stakeholders and the public about the tradeoffs of various fare structures and key influencers (such as technology, agency policies and goals, regional coordination opportunities and constraints, and customer data) that inform the options under consideration.

Metro facilitated two rounds of public feedback and a stakeholder advisory group, and contracted with community-based organizations to engage with populations unlikely to participate in our online questionnaires or Metro-hosted meetings. We conducted these activities between February and June 2017. In total, we received more than 12,000 comments on our priorities and fare change options. Who we engaged, how we engaged them, and what we learned are documented in this report.

Who we wanted to hear from

- Transit riders, including riders who pay with ORCA, Regional Reduced Fare Permits, ORCA LIFT, and cash; young people and older adults; students; Vanpool riders and drivers, and people who use Access paratransit
- Transit advocacy groups
- Schools, colleges, and universities
- Employers
- Transit operators
- Community-based organizations and groups that serve people who use transit
- Elected officials and local jurisdictions throughout King County

Methods for gathering feedback

- **Stakeholder Interviews** – We began our work and will continue it over the next two years through a series of stakeholder interviews with organizations or groups who have an interest in or serve people who use Metro services. The interviews are designed to build awareness of this effort; gather input on desired outcomes for fares and an accessible, easy-to-use fare payment system that increases access to transit; and understand the current perceived barriers to those goals. Interviewees will be invited to comment on any specific proposals.
- **Stakeholder Workshops** – We convened a group of 20 to 24 representatives from different organizations who reflect all types of transit users, including young people, older adults, people with disabilities, schools/colleges /universities, employers, and people with low or no income. This group met three times, serving in an advisory capacity and not making any formal recommendations or decisions. (See [Exhibit A](#) for a list of advisory group members and meeting summaries.)
- **Stakeholder Briefings** – We visited with 13 groups, including the county's transportation subarea boards and mobility coalitions comprising elected officials, jurisdiction representatives, and social service providers. We briefed stakeholders on the process, sought their input on our two-year work plan, and solicited their help to engage those they represent in giving feedback through our online questionnaires and public meetings. (See [Exhibit A](#) for a schedule of briefings that were conducted.)
- **Contracted Community-Based Organization Outreach** – We contracted with three organizations that serve populations unlikely to otherwise engage in Metro's public process. Metro provided questions and ideas for collecting feedback. The organizations gathered input in ways they determined would be

most effective, and provided documentation about their process and results to Metro. Organizations selected for this work met the following criteria:

- Primary work is provision of services to communities of color, communities with low English proficiency, low-income communities, and disabled communities
- Non-profit organization or public entity
- Represent a broad geographic and language distribution in King County
- Ability and willingness to conduct outreach to community members on behalf of Metro

(See [Exhibit D](#) for the engagement guide and questions provided to community-based organizations, as well as reports from each organization. Raw questionnaire data is available upon request.)

- **Online engagement** – We conducted two online questionnaires for the general public. The first, in late March through early April, gathered feedback on rider priorities for fare payment and ways in which current fares and the fare payment system address these priorities. The second, conducted in late April through early May, was designed to share fare-change options, solicit input on a preferred option, and gain insight on additional work Metro should consider to mitigate any adverse impacts of fare changes being considered.

We conducted one online questionnaire for employers who purchase passes for their employees to take public transportation. This questionnaire sought feedback on a preferred fare change option and potential effects of the options being considered on employer purchases and program administration. (See [Exhibit C](#) for the questions asked. Raw questionnaire data is available upon request.)

Please note: our questionnaires were not professionally administered customer research surveys. Results shared in this report reflects the views of a self-selected group of people and may not be a statistically valid representation of Metro ridership or King County constituents as a whole.

- **Public meetings** – During the second phase of outreach, Metro hosted one in-person open house and one live-streamed online meeting designed for the public to learn about the fare options being considered, ask questions, and comment. More than 900 people participated in these meetings live or watched the online meeting after the event. ([Watch a recording of the live-streamed public meeting online.](#))

How we let people know about their opportunities to participate

During both phases of engagement:

- **A project website** (<http://kingcounty.gov/depts/transportation/metro/programs-projects/fare-review.aspx>) outlining Metro's planning and decision making process and inviting people to provide feedback. The website was visited more than 8,400 times.
- **Media and social media** – news releases and social media posts to the Metro Matters blog, Facebook, and Twitter accounts were distributed at the launch of each of the two questionnaires. Social media posts reached 2,800 Facebook and 100,000 Twitter followers, generating 21,000 impressions and 207 clicks on links to the questionnaire. (See [Exhibit B](#) for a list of media coverage and social media metrics.)
- **Transit alerts** – sent at the launch of each questionnaire to encourage riders to provide feedback. Alerts were sent to more than 57,000 subscribers and were both opened by 29 percent of recipients with a click rate of 9 percent.

During the second phase of engagement only:

- **Coach posters** – posters were placed on all buses indicating the two options and inviting people to provide feedback online, by phone or email, or at public meetings.
- **Street teams** – Metro staff visited the Bellevue, Renton, and Northgate Transit Centers at midday to distribute flyers, answer questions, and solicit input from riders. We reached nearly 1,000 riders at these events.
- **Flyers** – 1,200 flyers were distributed at all customer service locations and by Downtown Seattle Transit Tunnel ambassadors.
- **E-notifications** – emails were distributed to stakeholder and interest groups, including organizations that serve populations dependent on transit, at the launch of each of the two questionnaires with a request that they spread the word about opportunities to participate.

Timeline

- **February** – Stakeholder interviews began; stakeholders recruited to participate in advisory group workshops
- **March** – Stakeholder interviews continued; facilitated first stakeholder workshop (March 2); solicited input via first online questionnaire (March 23 – April 7); began stakeholder briefings

- **April** – Facilitated second stakeholder workshop (April 4); community-based organizations began outreach; solicited input via second online questionnaire and two public meetings on two adult fare change options (April 19 – May 5); continued stakeholder briefings
- **May** – Facilitated third stakeholder workshop (May 18); continued and completed stakeholder briefings; continued community-based organization outreach
- **June** – Summarized public feedback, collected summaries/reports from community-based organizations

Public Feedback Summary

What we heard from stakeholders

We invited more than 20 organizations to provide feedback to Metro to help shape Metro's two-year fares work program and short-term fare simplification options. Members met in three workshops over the course of the engagement effort.

Workshop 1: How should fare change options be evaluated

Participants received an overview of the work program effort, goals, and basic information about Metro's current fares and fare programs. Participants offered feedback on barriers that certain populations face and issues Metro should take into consideration as we plan changes, including:

- Equitable consideration of college students who no longer qualify for a youth fare and might not qualify for ORCA LIFT.
- Shared concern for balancing fare recovery with service needs and an understanding that service will suffer if fares are too deeply discounted.
- Affordable housing, as well as the fixed income of some of our most vulnerable populations, are interrelated with transportation affordability.
- For some people with very low or no income, the ORCA LIFT fare may still be too high. The card replacement fee and minimum load value are also barriers to ORCA adoption and use.

Participants also helped identify criteria by which any fare change options should be considered:

- Increases market share among all rider groups
- Equity
- Safety
- Assures or improves service quality
- Affordability
- Integration
- Simple, ease of understanding
- Responsive to public feedback/preference

Workshop 2: Help narrow down adult fare change options

Participants were introduced to Metro's current efforts to increase affordable access to ORCA and transit. Staff then provided an overview of five adult fare change ideas weighed against the criteria shaped by the group and by public feedback gathered in the first online questionnaire.

Participants shared their initial thoughts on each idea, then allocated sticky dots to their preferred fare options. The options were ranked as follows:

1. Option B – flat fare \$2.75
2. Option A – flat fare \$2.50
3. Option E – peak fare high \$3.00
4. Option C – local fare \$2.50, express fare \$3.25
5. Option D – peak fare low \$2.75

Overall, participants expressed concern about how fare changes would affect those just above the income qualifying level for ORCA LIFT, as well as middle income families and low wage earners who have moved away from Seattle to find affordable housing.

Workshop 3: Final comments on fare change options, pilots/research

In this workshop, staff described the analysis they did after the second workshop to narrow down five adult fare change options to the two that were shared for public feedback in the second phase of outreach. They also provided further analysis on both of the final options based on questions and input from the group. Participants had a final opportunity to comment on the two options. Then, staff reviewed Metro's plans to improve affordable access to transit.

Participants expressed support for a pilot program to test the use of ORCA fare media in the Human Services Ticket Program. Several members expressed concern that the needs of college students still weren't fully accounted for. Members said they would like Metro to explore the possibility of a college student fare.

Participants were invited to share any additional thoughts about what Metro should research in more depth over the next two-year work program. They provided several suggestions and ideas for building better awareness of ORCA LIFT and reducing barriers to ORCA use, such as transcreating ORCA LIFT materials, allowing human service ticket providers the option of mailing tickets to program participants in advance of coming into an organization, and providing pass holders to ORCA LIFT enrollers to distribute with ORCA LIFT cards to help prevent card loss.

Workshop participants, agendas, materials, and summaries are available on the project website. Workshop summaries are also included in [Exhibit A](#).

What we heard from the general public

In this section, we are sharing results from the two online questionnaires conducted during our public engagement effort. This does not reflect feedback received from people who participated in community-based organization outreach documented later in this report. As a reminder, these questionnaires were completed by a self-selected group of people and may not be a statistically valid representation of Metro ridership or

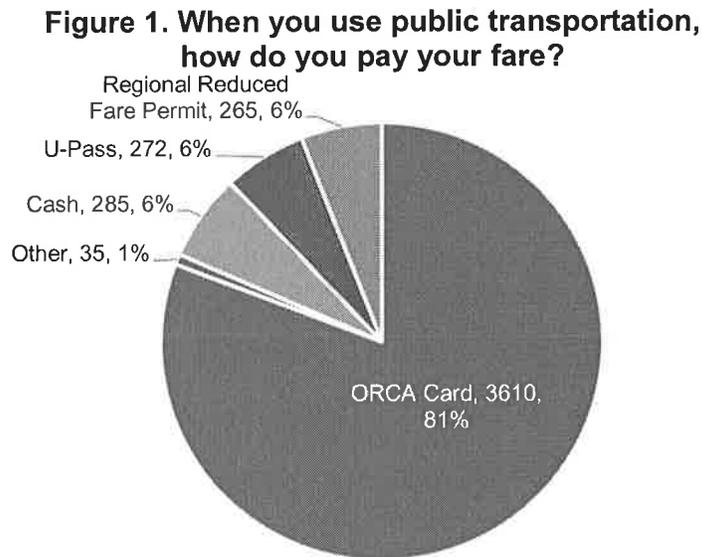
King County constituents as a whole. In addition, we structure online questionnaires to accept multiple responses from the same IP address so assure that people responding in public locations like libraries or at work or multiple people within a household where there is only one computer have the opportunity to respond. It is possible that one person could have taken the survey more than once.

First questionnaire: How well does our current fare system work, where should we focus improvements

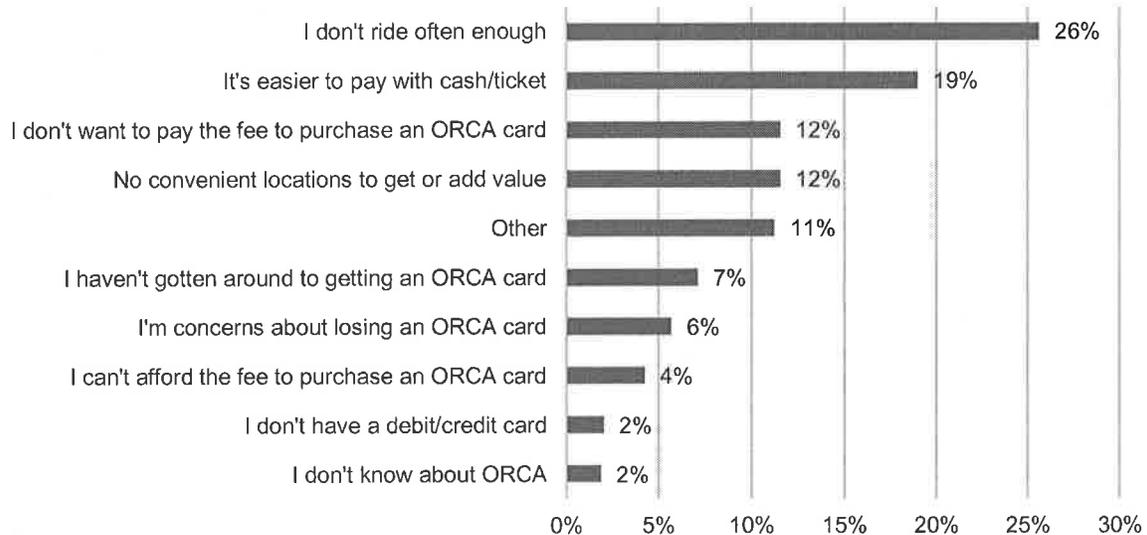
The first online questionnaire was open from March 23 through April 7. We asked about respondents' use of transit, how they pay their fares today, their awareness of fare discounts, how Metro is doing at meeting its policy goals, and how they would prioritize Metro's various fare policies to inform Metro's planning effort. (See [Exhibit C](#) for a set of the questions asked. Full questionnaire data is available upon request.) **At the close of the questionnaire, we had a total of 4,487 questionnaire responses.**

One-third of all responses indicate that those who took the questionnaire find it difficult or very difficult to understand Metro's fares.

Figure 1 shows that more than 80 percent of responses indicate questionnaire respondents currently pay their fare with an ORCA card.



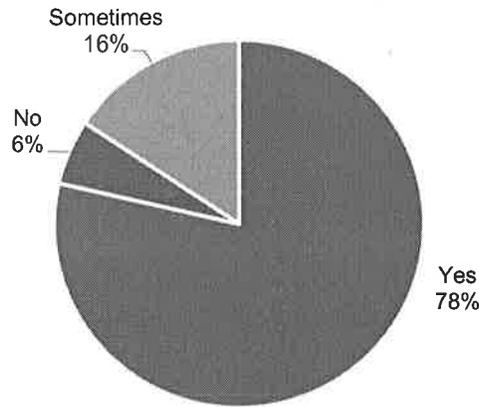
Of these 81 percent who with ORCA, 53 percent pay for their own monthly pass or E-purse. We asked respondents who pay with cash, even if they hold an ORCA card, why they choose cash. See Figure 2 for the results.

Figure 2. Why do you pay your fare with cash?

Those who chose "other" indicated the following reasons:

- Don't know enough about ORCA or the benefits of using it, or it's too difficult to understand
- Paying with cash gets them more value—a paper transfer lasts longer, sometimes travel 2-zones with a 1-zone fare, etc.
- Cash is liquid
- Lost their ORCA card or "lost" their money due to infrequent use
- Ride Access not often enough to buy a monthly pass

Figure 3 shows how respondents answered a question about whether they find the cost to ride affordable.

Figure 3. Is the cost to ride affordable for you?

Nearly one-fourth of responses indicate questionnaire responders find the cost to ride unaffordable to them some or all of the time. Their reasons why:

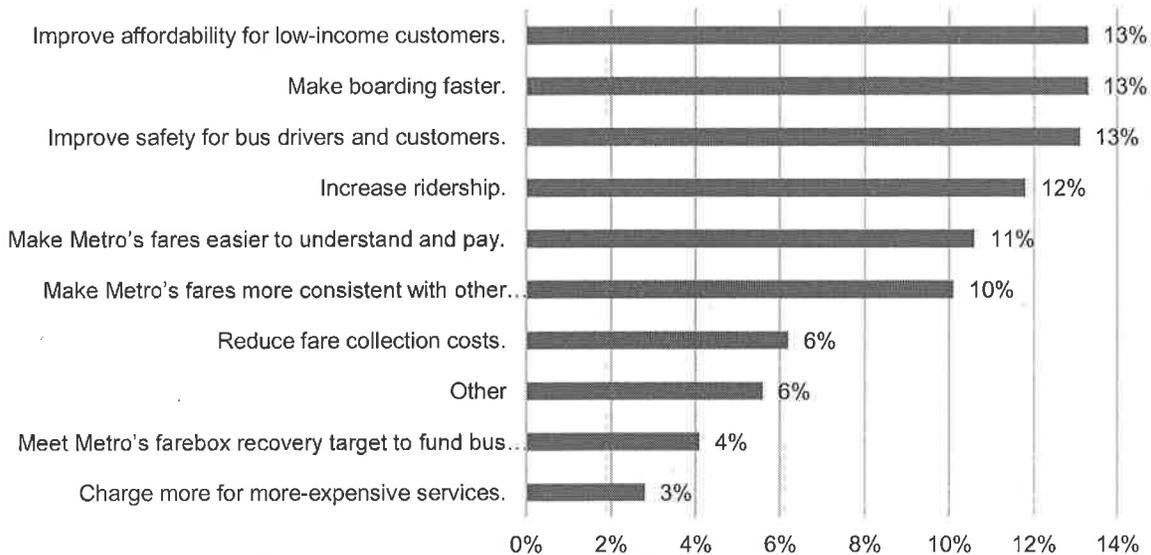
- They travel long distances across county lines, using different modes, or use services that charge a distance-based fare.
- Fares have gone up too much in recent years and they find the fares too expensive.
- Other options, such as driving, are cheaper and faster.
- They have low incomes—includes those who have families, earn minimum wage, feel a monthly pass is too much to spend at once, or are college students, artists, unemployed, youth during the summer, or seasonal workers.
- Their employer pays for their pass, but they could not afford it on their own.

Of the 930 responses that indicated the fare is unaffordable some or all of the time, nearly one-third are somewhat or very unaware of ORCA LIFT.

About 13 percent of the responses are from questionnaire responders who are ORCA LIFT eligible. This was determined by answers to questions of household size and household income to establish whether a responder is at 200% or below the federal poverty level. Please note there were optional questions and not all responders chose to answer them. Of those 574 responses, only 16 percent are using ORCA LIFT to pay their fare.

Figure 4 shows how respondents ranked the importance of Metro's fare policies:

Figure 4. Which of these policies do you think are most important?



There were more than 3,000 responses to the question, **“What one thing would you do to improve Metro’s fare payment system?”** In a random sample of 400 responses, the top 10 ideas in order of the number of times mentioned were:

- Simplify fare payment and make it easier to understand—including requests for a flat fare; elimination of zone and peak surcharges; simpler monthly pass options; confusion about various fare products, ways to purchase and use fare media
- Provide more locations to pay fares, including off-board payment options.
- Standardize the fare across agencies, including adding ferries and the monorail to the group of ORCA agencies.
- Eliminate cash payment.
- Make it easier for people with low income, seniors, and youth to get and use ORCA cards.
- Improve the ORCA website and TVM's – concerns were expressed about the website's poor user-interface and improvements were suggested to make the website and TVMs more user-friendly.
- Improve fare-related signs, marketing, and communications.
- Make transit free or reduce the fare for certain groups.
- Eliminate transfers.

- Don't change anything, the system is fine as is.

Other top-mentioned ideas that will be addressed in Next Generation ORCA include:

- Having e-purse loaded and available immediately after purchase.
- Ability to use a mobile app to reload ORCA, purchase E-purse or passes, and pay the fare with a smart phone.
- Have more ways to pay fares – via credit card or Apple or Google pay (this will be possible indirectly by adding value to an ORCA account through a mobile app or online).
- Fix “losing” value on ORCA card due to inactivity.
- Provide for “real time” ORCA value updates.

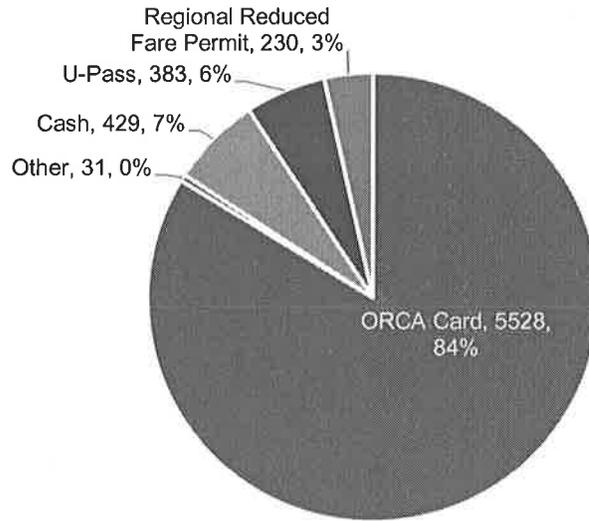
There were some creative ideas to speed up boarding or rethink Metro's fare structure entirely, including moving to “proof of payment” rather than having everyone pay a fare as they board the bus; daily fare capping so that once a person has traveled a certain amount for the day, they wouldn't be charged more than a certain amount; making fares entirely income-based; and making fares entirely distance-based regardless of mode.

Second questionnaire: What do people think about two adult fare-change options?

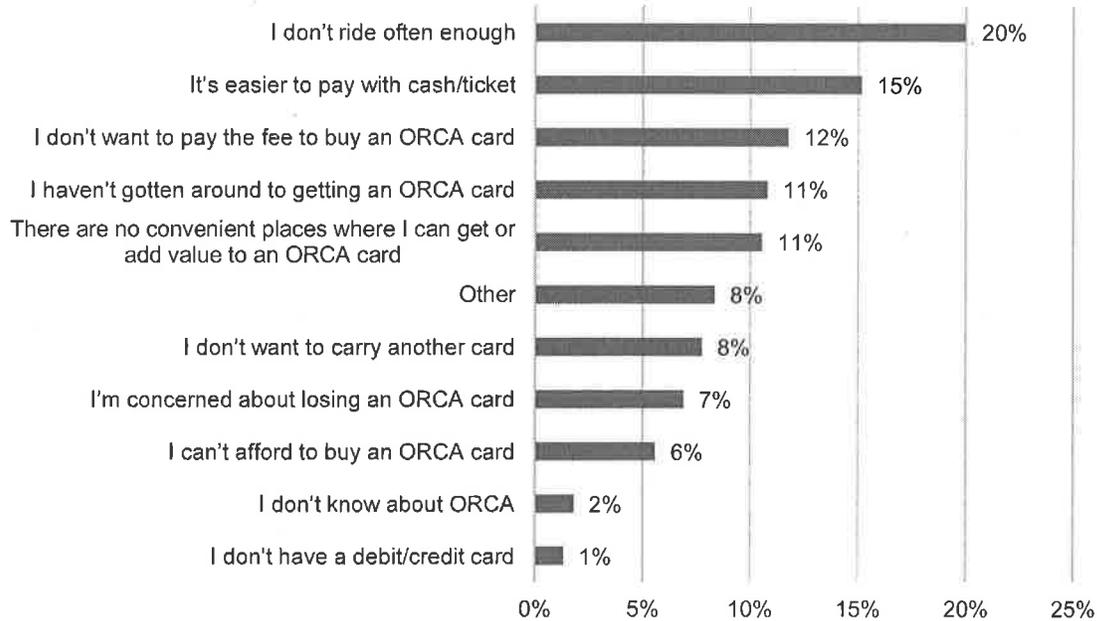
The second online questionnaire was open from April 19 through May 5. We sought input on two adult fare change options—a \$2.75 flat fare and a \$2.50 off-peak/\$3 peak fare. We also asked what might help mitigate any negative impacts of either fare option if it were enacted. (See [Exhibit C](#) for the complete set of questions we asked in this questionnaire.) **We had 6,656 responses to the questionnaire.**

Similar to the first questionnaire, Figure 5 shows that more than 80 percent of responses were from questionnaire responders who use ORCA to pay their fare.

Figure 5. When you use public transportation, how do you pay your fare?



Of those 84 percent who pay with ORCA, 56 percent pay for their own monthly pass or E-purse. We asked respondents who pay with cash why they don't use ORCA. See Figure 6 for the results.

Figure 6. Why don't you use an ORCA card?

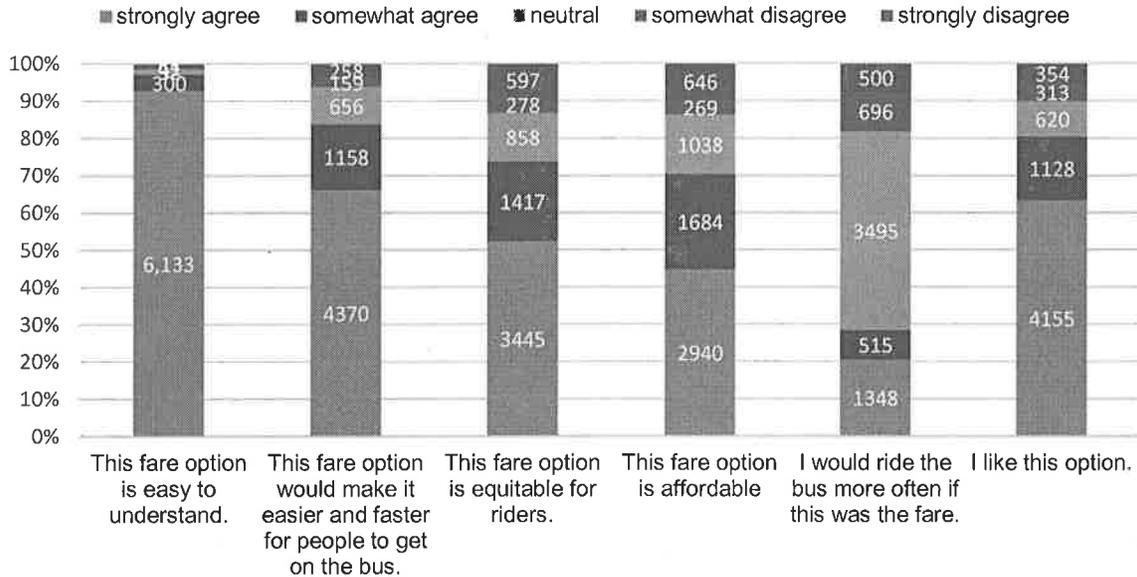
As determined by how responders answered optional demographic questions about their household size and annual household income, about 18 percent of the responses to the second questionnaire are from questionnaire responders who are ORCA LIFT eligible. Of those 1,177 responses, only 16 percent use ORCA LIFT to pay their fare.

We asked questionnaire respondents to indicate whether they agree or disagree with the following statements about the two adult fare options:

- This fare option is easy to understand.
- This fare option would make it easier and faster for people to get on the bus.
- This fare option is equitable for riders.
- This fare option is affordable.
- I would ride the bus more often if this was the fare.
- I like this option.

Figure 7 shows indicates how questionnaire responders feel about the \$2.75 Flat Fare option.

Figure 7. About the \$2.75 Flat Fare



- 97 percent strongly or somewhat agree that this option is easy to understand.
- 84 percent strongly or somewhat agree that this fare would make it easier and faster for people to get on the bus.
- 70 percent strongly or somewhat agree that this option is affordable.
- 80 percent strongly or somewhat agree that they like this option.

Slightly more than 300 responses were from questionnaire responders who somewhat or strongly disagreed that the \$2.75 flat fare would be affordable. Figure 8 shows how they would allocate resources to keep transit affordable in the following ways:

Figure 8. How would you keep transit affordable?

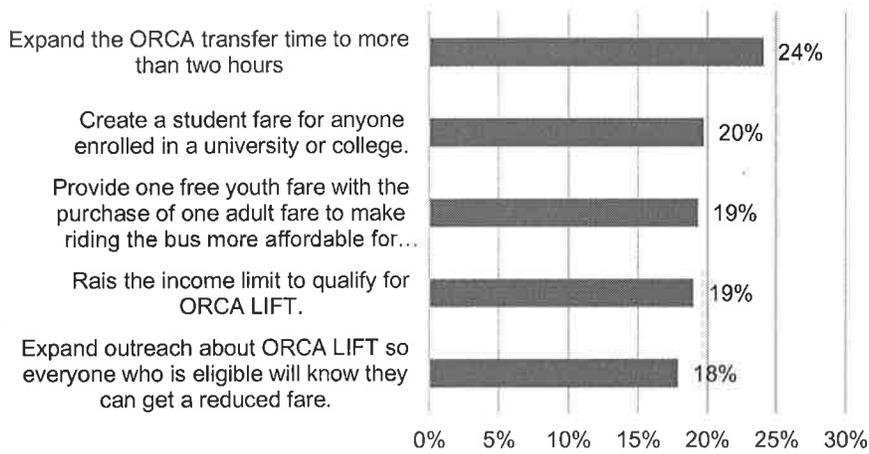
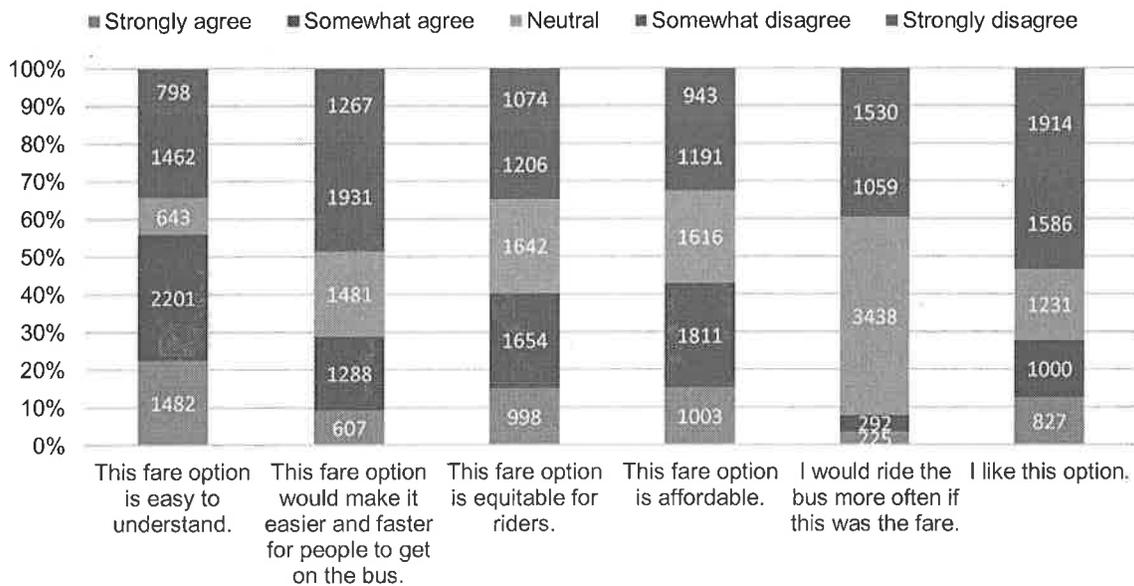


Figure 9 shows how respondents feel about the \$2.50 off-peak/\$3.00 peak Fare option.

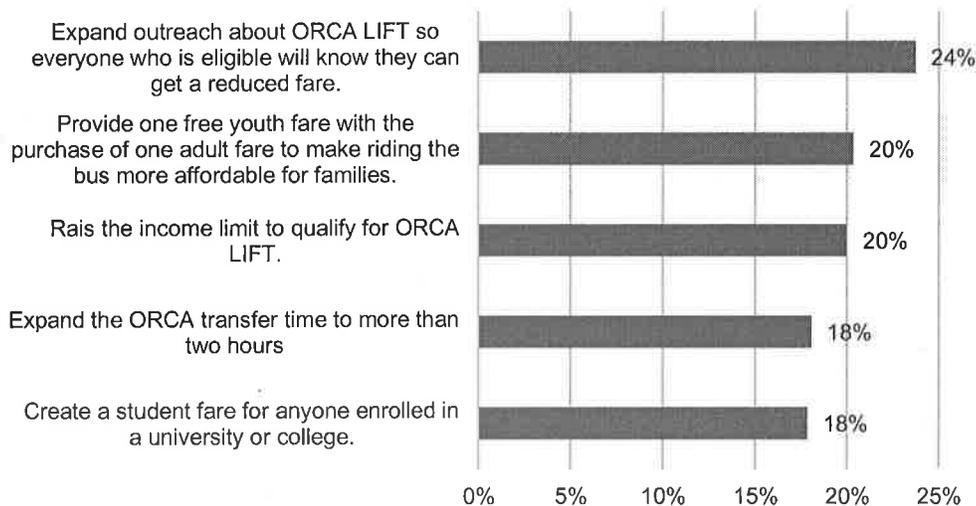
Figure 9. About the \$2.50 off-peak / \$3 peak fare



- 56 percent strongly or somewhat agree that this option is easy to understand.
- 29 percent strongly or somewhat agree that this fare would make it easier and faster for people to get on the bus.
- 43 percent strongly or somewhat agree that this option is affordable.
- 28 percent strongly or somewhat agree that they like this option.

Nearly 500 responses indicate that questionnaire responders somewhat or strongly disagreed that the \$2.50 off-peak/\$3 peak fare would be affordable. Figure 10 shows how they would allocate resources to keep transit affordable in the following ways:

Figure 10. How would you keep transit affordable?



We also asked respondents for other ideas to make ORCA and transit more accessible and affordable. We grouped answers into themes from those who strongly or somewhat disagreed that the fare option being proposed was affordable. Their ideas ranked in order of number of times mentioned include:

- **Reduce fares** – people offered other flat-fare amounts as well as reduced options for special user groups such as college students, those on low-income routes, youth, event-goers, low income, and seniors.
- **Improve service** – people had many ideas that expressed a desire to have better value for the fare paid, including increasing service frequency and span, investing in bus infrastructure and rider amenities, reducing overcrowding, improving reliability, and improving customer service and service quality.
- **Create disincentives for cash payment, incentives for ORCA payment** – people suggested offering different types of pass options (day, week, month, and annual), giving bulk discounts for number of trips or length of pass, and capping fares (daily or monthly) so riders aren't unfairly charged because they didn't buy the correct pass product; have a higher cash fare or lower ORCA fare; eliminate transfers; or stop accepting cash payments altogether.
- **Free fares, fund transit through different revenues** – whether for certain groups of riders—such as low income, seniors, youth, or disabled—or for all

riders, many people suggested that public transportation should be free for everyone and funded through other revenues.

- **Current fare, cost of living is too expensive** – some people are concerned that the current fares are already too expensive and, combined with increased cost of living regionally, shouldn't be raised any more.
- **Eliminate or reduce ORCA card fee, distribute free cards more liberally** – some people feel the benefit of getting ORCA cards into people's hands outweighs the cost to do it. They perceive the card fee as an unnecessary barrier to ORCA use and adoption.
- **Increase places people can purchase and load ORCA cards**, making it easier to get and use one.
- **Consider other fare structures** – people recommended charging fares by distance, income, or location of the service.
- **Make it easier to pay by cash or credit/debit** – improve transfer technology, make other agencies accept cash transfers, and provide ways for people to purchase tickets for the bus with cash.
- **Improve communication and technology at stops and at large** so people eligible for ORCA LIFT know about it and can get it; people know what the fare is and how to pay; and know easily how much money is left on their ORCA card.
- **Accept the same fare and fare media on all modes** – people expressed frustration at the difficulty and expense when they use multiple modes to travel.

In addition to questionnaire responses, Metro received comments from people in email and by phone, as well as two formal letters from the Seattle Transit Advisory Board and Transportation Choices Coalition. Comments from the general public expressed support for one fare change option over another, provided ideas to speed up boarding or create incentives ORCA use and transit ridership, and documented concerns about any changes to the senior or disabled fare. (Comments and letters are available upon request.)

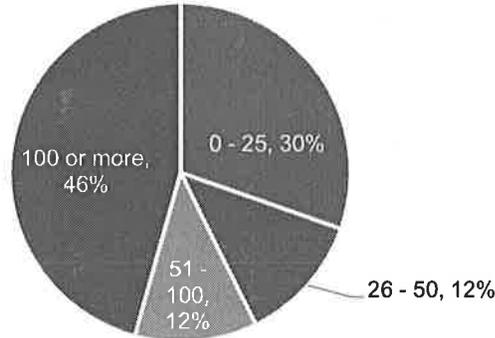
What we heard from employers

We invited ORCA employer representatives to participate in a questionnaire to provide feedback on the two adult fare change options Metro considered with the general public. Out of 3,600 invited, we received 141 responses to the questionnaire.

Who we heard from

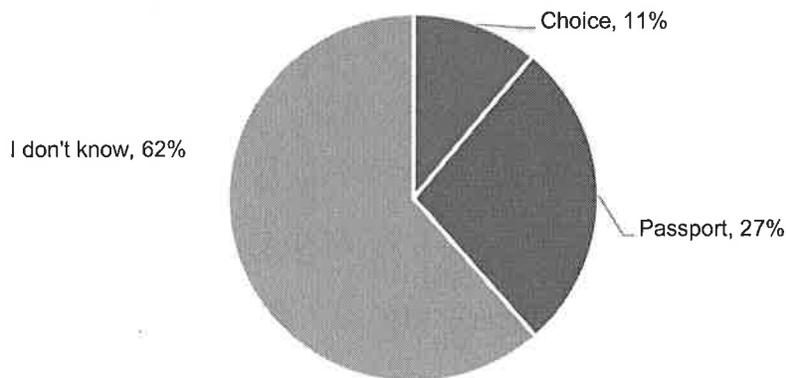
Figure 11 shows demonstrates the size of the organizations we heard from.

Figure 11. How many employees does your organization provide a transportation benefit to?



There are two types of employer accounts: Passport and Choice. Employers that have Passport accounts provide employees with an ORCA card that offers unlimited rides. Employers that have Choice accounts purchase ORCA card on which employees can load retail pass products and e-purse. Employees who work for Choice account employers contribute in varying levels depending on the employers benefit program to the product that is loaded on their card through payroll deduction. Figure 12 shows the type of employer account held by the employer representatives that responded.

Figure 12. What type of ORCA employer account do you have?



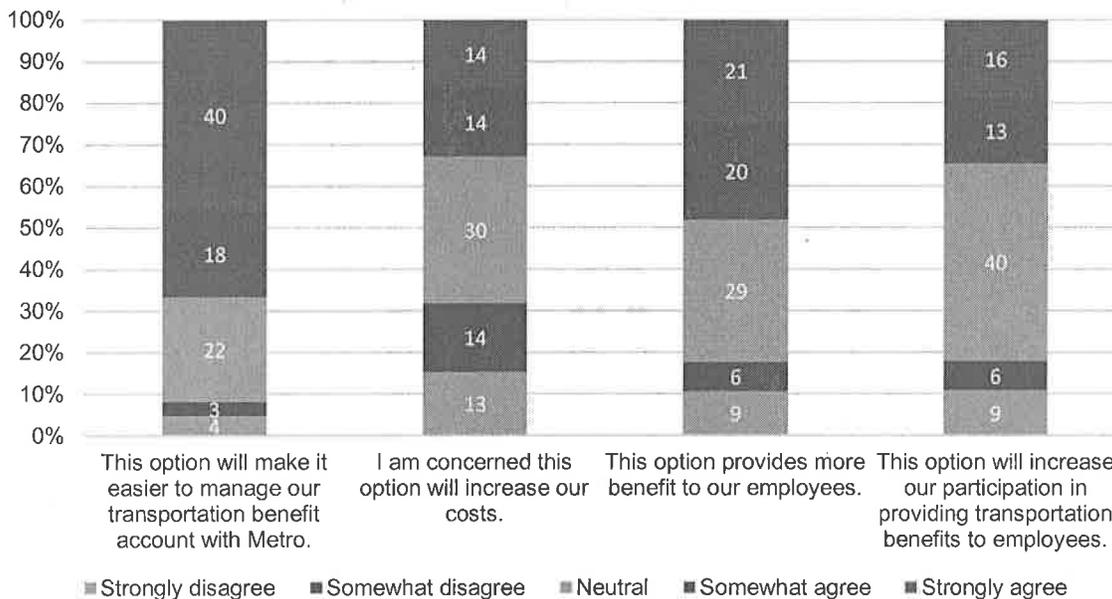
About the \$2.75 flat fare option

Sixty-seven percent of responses indicate questionnaire responders strongly agree or somewhat agree that this option will make it easier to manage their transportation benefit account with Metro.

- 32 percent are concerned this option will increase their costs.
- 49 percent think this option provides more benefit to their employees.
- 34 percent think this option will increase their participation in providing transportation benefits to employees.

Figure 13 shows results for all statements responders were asked to indicate their level of agreement.

Figure 13. Please indicate whether you agree or disagree with the following statements on the single adult fare of \$2.75 (\$99 monthly pass) option:



About the \$2.50 off-peak/\$3 peak fare option

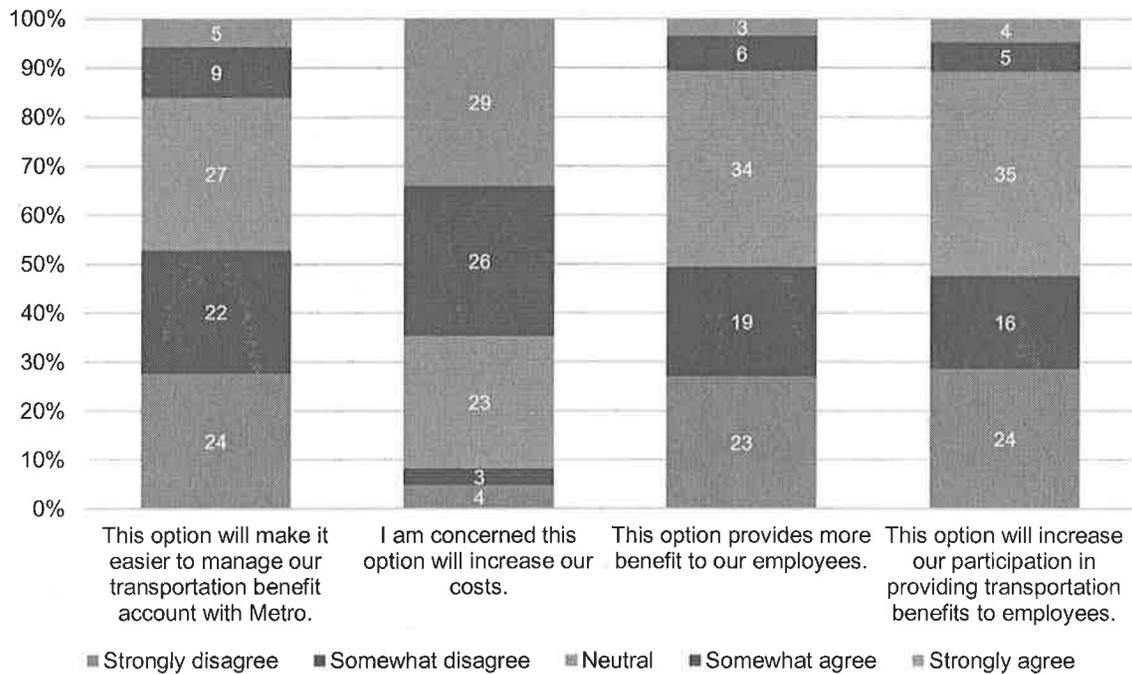
Sixteen percent strongly agree or somewhat agree that this option will make it easier to manage their transportation benefit.

- 65 percent are concerned this option will increase their costs.
- 11 percent think this option will provide more benefit to their employees.

- 11 percent think this option will increase their participation in providing transportation benefits to employees.

Figure 14 shows results for all statements responders were asked to indicate their level of agreement:

Figure 14. Please indicate whether you agree or disagree with the following statements on the single adult fare of \$2.50 (\$99 monthly pass) with the peak period adult fare of \$3 (\$108 monthly pass) option:



Thirty-six people responded to the question, "If you could do one thing to improve your experience as an ORCA employer account, what would you do?" We categorized the responses as follows:

- 17 percent would like better volume discounts
- 14 percent recommended administrative changes be made that would make it easier to manage their account, such as:
 - Making auto-renew available – especially for employees who choose a monthly pass option
 - Making it easier to purchase monthly or annual passes
 - Making it easier to order month-to-month

- Making it easier to transfer funds from old to new cards
- 14 percent would like more options such as:
 - The ability to provide a benefit to part time employees
 - Other payment options – both for the employer and for the bus rider (e.g. stop using plastic cards)
- 14 percent said nothing needs to be improved.
- 11 percent would like the web interface for account management improved or other online tools available for easier account management.
- The following comments were made by less than 8 percent of respondents:
 - Concerns about a fare increase
 - Concern about the difficulty of implementing a fare change from an employer account perspective
 - Preference for one option or the other
 - Support for fare simplification
 - Request for more sharing of data so employers can make better decisions about pass purchases.

What we heard from people served by community-based organizations

Metro contracted with three community-based organizations (World Relief, White Center Community Development Association, and Hopelink) to gather input from populations unlikely to participate in our online questionnaires. Their work was not contracted to be statistically valid customer research. As such, the results reflected here are not a statistically valid representation of Metro ridership or King County constituents as a whole.

They collectively reached 311 participants. Ages, languages spoken, race and ethnicity, and incomes vary greatly across questionnaire audiences. For example, World Relief's questionnaire participants largely reported being unemployed, while some from WCCDA and Hopelink reported annual household incomes of over \$60,000, and as high as \$150,000. Similarly, an overwhelming majority of WCCDA's questionnaire participants are under the age of 18: of the 172 respondents, 132 are 18 years of age or under (77 percent), with a median age of 16. On the other hand, more than half of Hopelink's participants are over the age of 40 (61 percent).

Qualitative and quantitative data reveal the themes and concerns of both frequent and infrequent users of Metro services. WCCDA's results in particular reveal notable themes expressed by the youth who participated in WCCDA's outreach. Major themes:

- **About two-thirds of all participants use transit;** of those who ride public transit, most use it 1 or 2 times per week. More than one-third of participants said they *never* use public transit (weighed heavily by WCCDA participants' young age)
- The most common reasons participants choose to drive a car, rather than use public transit are:
 - Driving is easier and more convenient, practical, and flexible.
 - Driving is faster, and buses are not timely.
 - Lack of service and long travel distances in rural areas in eastern and southern King County.
- Suggestions for improving transit include:
 - **Routing and service** – greater frequency, longer service hours, and improved timeliness of buses—particularly express and commuter routes.
 - **Payment and expenses** – affordability and fare increase concerns, complex fare systems, accessibility of payment options; in particular, numerous WCCDA respondents desire free or discounted fares for youth and students.

Major themes concerning participants' fare payment practices include:

- **Just over half (52 percent) of all participants questionnaired use cash to pay their fare,** while just under one-third (30 percent) use an ORCA card—again, this is weighed heavily by responses from participants who *never* use transit.
- The most common themes regarding paying fares with cash:
 - **Cash is seen as the easiest and most convenient payment method.** For numerous respondents, cash is the only payment method to which they have access.
 - **65 percent of participants do not own an ORCA card,** but many indicated that obtaining one would help them move away from using cash as payment. Numerous respondents expressed confusion or hesitance about obtaining an ORCA card, unaware of how or where to obtain or refill cards.
 - **Many participants identified financial barriers to acquiring an ORCA card,** deterred by the upfront costs, lack of any price advantage, and

difficulty of refilling; similarly, respondents also favored bulk daily, weekly, or monthly passes, offered at a discount for frequent riders.

Overall, questionnaire participants reached by all three organizations are comfortable with technology:

- 49 percent of respondents rate their comfort with technology to pay their transit fares at a score of 7 or higher (out of 10, the most comfortable)
- **80 percent of participants own a smartphone**, and 60 percent use their phone to get information about transit.
- Among those who use their phone to get information about transit, at least 67 percent use Google Maps and/or OneBusAway apps (43 percent rely on one or the other).

Due to different questionnaire administration methods and varying levels of detail among the organizations, results for barriers to fare payment and reduced fare options are limited. Not including World Relief data (which was not provided or specified), 15 percent of respondents say they face barriers paying their transit fare; this value would likely be slightly higher if World Relief participants were included. Hopelink also told Metro that the wording of questions about barriers may have been difficult for questionnaire takers to understand. They suggested that in future research, Metro should transcreate questionnaire questions so they are easily understood in culturally and language relevant ways.

World Relief provided feedback regarding participants' awareness of reduced fare programs and opinions on the fare-change options:

- 60 percent of World Relief participants knew about low-income fare discounts; among them, 77 percent believed they qualified, though 65 percent did not know how to access these benefits or participate in these programs.
- To make these programs more accessible, respondents suggested expanding advertising of benefits via web advertisements, Facebook, information sessions, and e-mail notifications (considered better than physical mail, as participants move frequently).
- **A single, flat fare regardless of peak hours or zones is slightly more popular and considered easier to understand** than the Off-Peak/Peak Fare option. According to World Relief, a majority of respondents agree that it would make the bus more affordable and time-efficient, making them more likely to ride:
 - 70 percent of respondents either strongly or somewhat agree that the Flat fare option is easy to understand, compared with 52 percent for the Off-Peak/Peak Fare option.

- 35 percent of respondents strongly like the Flat Fare option, compared with 33 percent for the Off-Peak/Peak Fare option. Alternatively, twice as many respondents strongly dislike the Off-Peak/Peak Fare option (15 percent strongly dislike the Off-Peak/Peak Fare compared to 8 percent who strongly dislike the Flat Fare option).

Measures of Success

In all of Metro's Have a Say public engagement efforts our process goals are to make sure participants:

- reflect those who will be affected by the change we are considering
- understand what's being planned and how it will affect them
- feel welcomed and have enough time to participate meaningfully
- are aware of and see how public input influences the decision-making process.

To help gauge how well we accomplished these goals, we ask a series of process questions in our online questionnaires. We also compare demographic data collected from outreach participants to rider questionnaire results. This has its limitations. Our public engagement efforts are not designed to be statistically valid customer research so we are comparing results from a self-selected group of people to data that was collected from a statistically valid customer research process. In addition, the public engagement data reported is only reflective of those who chose to answer those optional questions and may not be reflective of questionnaire responders as a whole.

We conduct and provide this comparison to help us balance feedback and input received from multiple channels – for example, online feedback is important as is feedback received from qualitative engagement conducted by community-based organizations. Where there are differences in the feedback, one does not outweigh the other.

We also set goals and conduct this comparison to help us learn and continually improve our engagement efforts. It helps us understand what works, what doesn't, and how we can be as inclusive as possible in assuring those who are affected by a change have the opportunity to help shape the outcome.

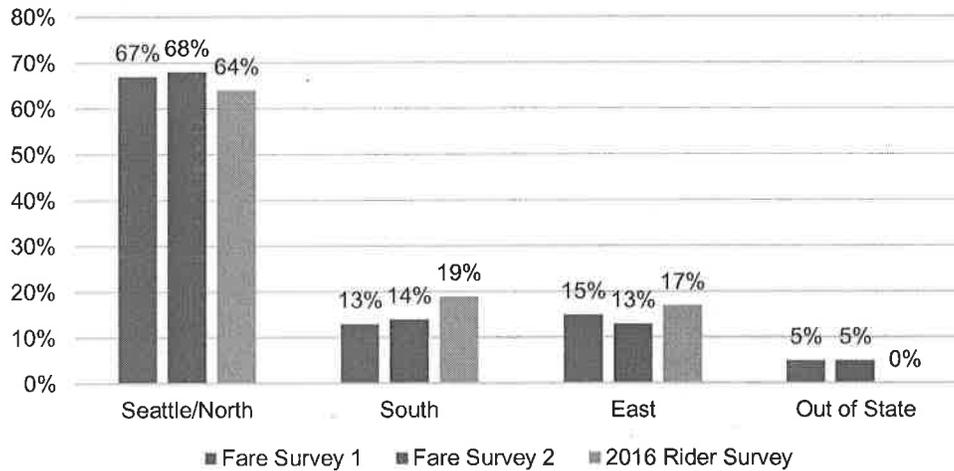
Did we hear from people who reflect those affected?

Demographic data provided by fare questionnaire respondents shown here and are compared to the rider questionnaire, which is a statistically significant representation of Metro ridership. It is important to note that both of Metro's fare questionnaires were online and reflect the input from a self-selected group of people who chose to take the questionnaire. Metro's annual rider questionnaire is conducted by phone and is statistically valid customer research.

In terms of participation from around King County, the Rider Questionnaire tracks ridership by the following regions: Seattle/North, South, and East King County. In our online questionnaire, we asked responders for their. We mapped the zip code

responses from those who chose to provide it to the areas captured in the Rider Questionnaire to produce Figure 15.

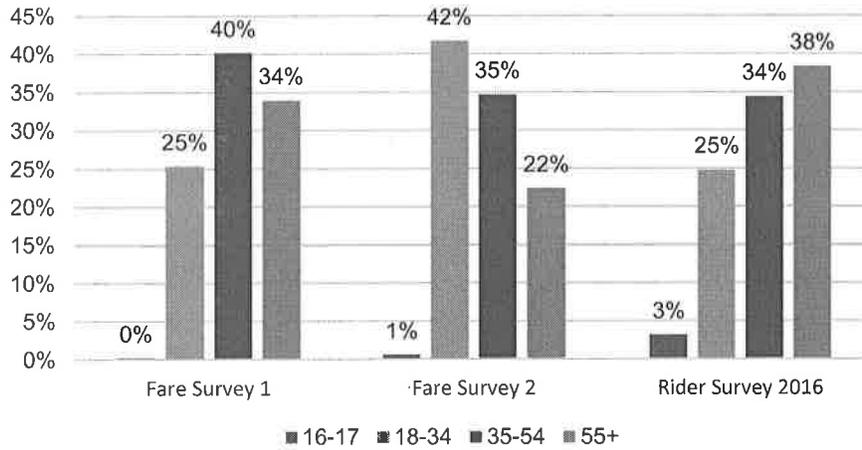
Figure 15. Participation by subarea



Participation from around the county in our online questionnaires is consistent with ridership percentages in subareas of the county as reflected in the rider.

Figure 16 shows that, in terms of age, a higher percentage of people ages 35-54 and a lower number of people 55 and older participated in the second fare questionnaire compared to the rider questionnaire. This may be because the second questionnaire sought input on adult fare changes and no changes were being considered for the senior fare.

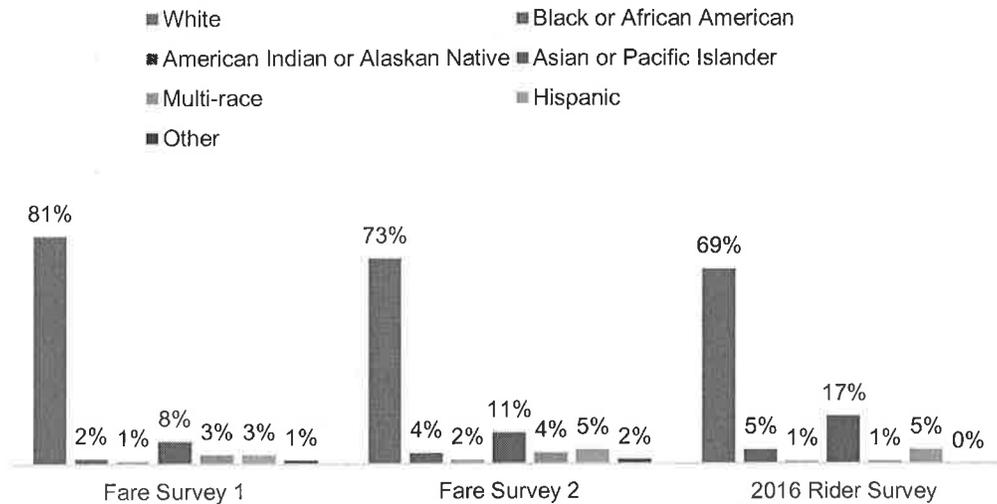
Figure 16. Age



Race/Ethnicity

Figure 17 shows that, while the first fare questionnaire had a higher percentage of white participants and a lower percentage of people of color, the second questionnaire's participation rates came closer to reflecting the demographics of Metro's ridership as captured in the rider questionnaire.

Figure 17. Race/Ethnicity



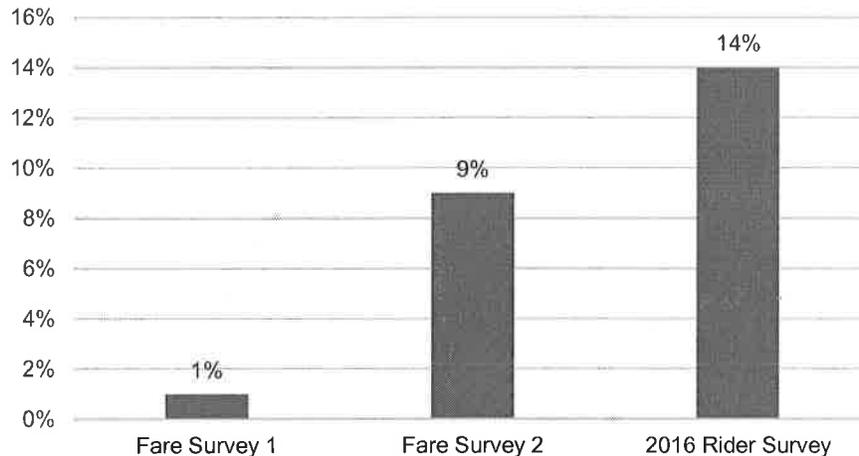
Primary Language

The rider questionnaire does not track language spoken at home; however, we heard from a number of language groups during the course of this outreach. More than 90 percent of our online questionnaire takers speak English as their primary language at home. Census data suggests that about 26 percent of people in King County speak a language other than English at home. Spanish, Chinese, Vietnamese, Korean, Russian, African languages, Tagalog, and other languages made up the 3 to 5 percent of other online questionnaire takers.

In our outreach with community-based organizations we engaged more than 300 people who speak the following languages:

- Amharic
- Arabic
- Cambodian
- Chinese
- Dari
- Ekirondi
- English
- Farsi
- Khmer
- Mam
- Pashto
- Punjabi/Hindu
- Russian
- Samoan
- Somali
- Spanish
- Swahili
- Tagalog
- Tigrinya
- Turkish
- Twi
- Ukrainian
- Urdu
- Vietnamese

Figure 18 shows that we did not hear from people with disabilities in the same proportion as our ridership. This could be because we recently completed a yearlong public engagement effort with riders with disabilities in which we asked questions about fare payment. We also did not consider any changes to the Regional Reduced Fare Permit or Access paratransit fares.

Figure 18. Yes, I have a disability.

Household Income

In this engagement effort, we were most interested to understand feedback and fare payment practices among people who qualify for ORCA LIFT. This will help us understand barriers people face to our existing discounts, and specific concerns or barriers faced by people who are just above the ORCA LIFT income qualification as we develop more research and pilot programs.

Eligibility for ORCA LIFT is determined by household size and annual household income. By asking both questions—what is your household size, then is your income above or below a certain amount—we were able to determine and analyze results from participants who are “low income.”

Thirteen percent of the first questionnaire respondents would qualify for ORCA LIFT. Eighteen percent of the second questionnaire respondents would qualify for ORCA LIFT. Census data indicates that about 24 percent of King County residents are below 200 percent of the federal poverty level and would qualify for ORCA LIFT.

Participants in our community-based organization outreach were primarily people with low or no income.

Was information about participation clear and welcoming?

- First questionnaire – 97 percent yes
- Second questionnaire – 95 percent yes

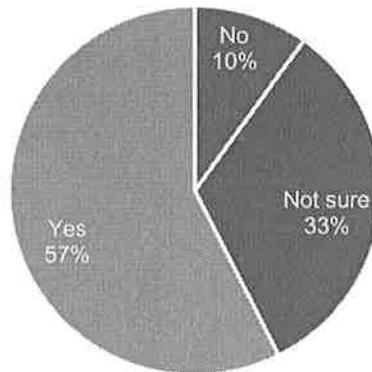
Were participants notified in time to provide meaningful feedback?

- First questionnaire – 95 percent yes
- Second questionnaire – 85 percent yes

Did participants see how input shaped decision making?

The second questionnaire built on feedback received during the first phase of engagement. In the second questionnaire, Figure 18 shows participants answers to the question: “Regardless of how you feel about the adult fare change options, do you see how public input shaped these choices?”

Figure 18. Regardless of how you feel about the adult fare change options, do you see how public input shaped these choices?



Exhibits

Exhibit A – Stakeholder Engagement**Fare Review Stakeholder Advisory Group Members**

Ezra Basom	Metro Transit bus driver
Kendle Bjelland	Commute Seattle
Cliff Cawthon	Rainier Beach Action Coalition
Hillary Coleman	Seattle-King County Coalition on Homelessness
Anne Eskridge	University of Washington, Transportation Services
Juan Flores	Rainier Beach Action Coalition
Augusta DeVries	Bellevue Downtown Association/TransManage
Hope Drumond	Alliance of People with disAbilities
Gail Gustavson	International Community Health Services
Daniel Heldring	Microsoft
Kimberly Heymann	Alliance of People with disAbilities
Jeff Keever	Seattle Central College
Claire McDaniel	Sound Generations
Aaron Morrow	King County Transit Advisory Commission
Daphne Pie	Public Health – Seattle King County
Janelle Rothfolk	Catholic Community Services of King County
Hester Serebrin	Transportation Choices Coalition
Arielle Washington	Urban League of Metropolitan Seattle
Katie Wilson	Transit Riders Union

Fare Review Advisory Group Workshop #1

Meeting Summary

March 2, 2017

Washington Hall, the Lodge Meeting Room

153 14th Ave, Seattle

1:00 p.m. to 3:30 p.m.

Participants

- Aaron Morrow, King County Transit Advisory Commission
- Anne Eskridge, University of Washington, Transportation Services
- Arielle Washington, Urban League of Metropolitan Seattle
- August DeVries, Bellevue Downtown Association/TransManage
- Claire McDaniel, Sound Generations
- Daphne Pie, Public Health – Seattle King County
- Hester Serebrin, Transportation Choices Coalition
- Hope Drumond, Alliance of People with disAbilities
- Janelle Rothfolk, Catholic Community Services of King County
- Katie Wilson, Transit Riders Union
- Kimberly Heymann, Alliance of People with disAbilities

Absent

- Gail Gustavson, International Community Health Services
- Gregory Davis, Rainier Beach Action Coalition
- Jeff Aumell, Microsoft
- Jeff Keever, Seattle Central College
- Kendle Bjelland, Commute Seattle

Welcome and opening remarks: Fares Work Program purpose and goals

Chris O’Claire, Manager of Strategic Planning and Analysis at King County Metro, welcomed participants and observers to the meeting. She provided an overview of Metro’s Fare Work Program being planned with input from the advisory group and the public, including the purpose and goals of Metro’s work related to fares. (See page 2 “Purpose” and page 3 “Goals” in meeting slides.)

Introductions

DeAnna Martin, Community Relations Planner at King County Department of Transportation and meeting facilitator, introduced staff and asked participants to introduce themselves sharing their name; any affiliations they'd like the group to be aware of; and if/when they ride transit how they pay their fare.

Meeting agenda and purpose, role of advisory group, timeline, and scope

DeAnna when on to review the meeting purposes, which were to:

- Introduce participants to each other and the process; the advisory group's charter, scope, and timeline.
- Build and deepen awareness about Metro's existing fares, fare payment system, and known and unknown issues that need to be addressed in the short or long term.
- Solicit input on criteria by which fare changes considered in the short-term should be analyzed and prioritized.

She reviewed the role of the advisory group and a work program outline for the meetings of the group. (See page 6 "Role of this Group" and page 7 "Timeline" in meeting slides.) She invited participants to practice King County's Guidelines for Multicultural Interactions during each meeting and asked participants to acknowledge their commitment to these guidelines. (See handout.)

Briana Lovell, Transportation Planner and program manager at King County Metro, provided an overview of the Fare Work Program's scope of work and how advisory group feedback would shape the scope. (See pages 8-9 "Scope of our Work" in meeting slides.)

One participant asked whether the pilot program ideas in the short-term would go to King County Council in June. Staff answered that, if they need council adoption, they would, but there are many things Metro can do without council approval.

Another participant asked when would zone and peak surcharge changes go into effect. Staff responded that the changes may go into effect in 2019 or later as they would be tied to the implementation of the next generation of ORCA.

Existing Conditions: background on Metro fares

Briana oriented the group to background on Metro's fares. (See pages 10-13 on "Existing Conditions" in the meeting slides for details.) She focused on some high level details from a larger and more in-depth handout distributed to the group. (See handout.)

As she presented, participants provided the following comments and questions:

- Q: What part of revenues for Metro do fares make up? If there are reductions in that, does service get sacrificed? A: Metro has a fare recovery policy target of 30% - meaning that 30% of the operating cost of the service should be recuperated by fares, and a floor of 25%. Vanpool has a 100% fare recovery. Access Transportation has no fare recovery mandate.
- Concern was expressed that the impact of a service "reduction" if revenue goes down would affect the programs that serve to make transit accessible.

Staff noted that there was more detail on policies that relate to fares in the background packet, and would be happy to provide answers to additional questions.

- An Access customer shared that Access Transportation program has potential to be impacted by service and fare changes.
- Concern was shared about the quality of the experience riding the bus and how that correlates to ridership and people's sense of the value they pay for riding.
- Staff shared that aspects of the fare work program that focus on ease of payment and speeding up boarding are related to customer experience as well as cost-efficiencies that can allow Metro to put greater resources toward the service itself.
- Cost of housing is interrelated with transportation in terms of what is affordable for people. Analysis needs to include this. As cost of housing goes up, people move to where it is more affordable. This may mean traveling longer distances.
- There is an equity intersection between fare recovery and service allocation that varies from route to route and by time of day.
- Q: What is an ORCA Passport? A: A participating employer pays all or some percentage of the cost. Q: What's an ORCA Puget Pass? A: A monthly pass some employers reimburse fully or partially. Comment: the product names are confusing.
- Q: On the slide about how riders pay their fares, is this a percentage based on rides or riders? A: It's percentage of rides.

- Q: Is Sound Transit also doing work around this? A: Yes, we are partnering at the staff planning level and on outreach in April to consider changes to make fares simpler. Any changes we make to fares will be discussed with and in alignment with partner agencies. Other agencies considering changes include Community Transit and Pierce Transit.
- Comment on how to increase youth ridership, means we need to redefine the definition of youth to include all students, not just young people.

Staff responded that the current definition of youth is 6 to 18 years old, but that Metro has been in conversation with colleges about how to make it easier for students who qualify for ORCA LIFT to take advantage of the incentives colleges provide for riding transit. There are also differences between grade school and high school level ridership. The entire topic of student fares is worth exploring in pilot projects.

- At the UW, there are food banks on campus. One third of students struggle at some point making ends meet while enrolled at the university. UW is exploring what it means that there's a U-Pass and ORCA LIFT. Are there cost advantages for both the university and students in getting the right ORCA product in the hands of students who are struggling to make ends meet?
- Some youth remain in high school until they are 21 years old.
- On the "How the discounts we provide today affect fare revenue" slide, there were questions about what this data was showing. A: The numbers here reflect the difference between base adult fare and lower fares provided.
- Concern was expressed that this chart shows the "loss" of fare revenue because of discounts instead of showing the "value" of increased ridership because a discount is being offered.
- Q: What was the policy rationale for the Access fare being "closer" to the adult base fare? A: This policy was established long ago when Access was first created. The FTA rules that apply to paratransit fares indicate that the paratransit fare cannot be more than double the adult base fare, which would currently be \$5.00. At \$1.75 Access is still below the adult base fare.

Staff noted that this is intended to show the value of the discount provided through reduced fares, not the lost revenue. Metro could also look at the amount of revenue these discounted fares bring in rather than what they don't.

Staff said they would work to add more of that information to the existing conditions piece and share it with the group.

In response to the slide entitled, “What we’ve heard,” which was followed by an invitation to tell us if anything was missing from the list, participants added:

- There are some who can’t afford the \$3 card to get the Regional Reduced Fare Permit (RRFP); can’t afford the \$5 minimum load on an ORCA card; or can’t afford the \$5 card charge for a LIFT replacement
- People with disabilities receiving the max supplemental security income get \$733 a month. A monthly transit pass is a big chunk out of this monthly budget which covers the cost of housing, food, and transportation.
- The large amount of documentation required for an RRFP or ORCA LIFT is a barrier for people to get it.
- We wonder about clients we give bus tickets to and how many have an ORCA card already, but can’t afford to load it.

What guides our work? Discussion of policy and community goals

Briana provided a quick overview of the policy goals that guide Metro’s work around fares. (See page 14 “What Guides our Work.”)

Participants asked what “easy for customers” means. They advocated that the policy definition should include language access and the ability to travel easily across the county border or multiple modes.

Another participant asked whether the policies were prioritized in any way or whether there is direction about which policy prevails when an obvious tradeoff between them is presented. Staff explained that there is no explicit guidance on fare-related policy tradeoffs, although ultimately King County Council sets and directs these policies.

DeAnna facilitated the group in an exercise to identify criteria or priorities by which any changes to fare payment should be weighed against. The group came up with the following categories: (Note: each bullet indicates a hand-written comment by participants on a post-it note.)

Increase the market share for all markets

- Does it increase the % of low-income rides?
- Cost recovery goes up through increased ridership via ease of use and good marketing materials
- Does it increase the share of rides taken w/an ORCA unlimited pass?
- Does it expand “market share” of employer passport clients - and landlord subsidized pass programs?

- Does it improve transit access for low-income and very low-income riders?

Equity

- Equity: in distribution, in impact, in services available

Safety

- Look at Muni in San Francisco that does not accept cash payment for a model

Assures or Improves Service Quality

- Speeds up boarding
- Timeliness of service
- Geography of transit service
- Expanded early & evening service even if price point is higher to encourage additional ridership
- Rate/speed of boarding the bus
- On-time service
- Rates provided around public services for low income/disabled
- Dependability and safety of buses and for riders and operators
- Frequency of peak transit service

Affordability

- Cost is not barrier
- Expanded definition of student youth rider fees
- Working families can afford Metro bus pass for children who don't qualify for ORCA LIFT
- Affordability for all income levels
- Greatest intersection opportunity for low-income without cuts to service – higher volume ridership of low income riders
- Reduce costs associated with a student fare
- Impact on people with disabilities, including income

Integration

- Integrated services with integrated rates
- Impact on regional partnership
- Intersects clearly with partner service and zones
- Metro bus tickets can be used for light rail

*Extent to which change requires fare enforcement**Simple, Ease of Understanding*

- Simplicity of employee pass program options
- Simplicity of fare structure
- Ease of understanding or don't have to think about it
- Improve accessibility by using interactive tools like ONEBUSAWAY push this tool so people know about it.
- Put a QR code on cards so people can check balances on go w/smart phone
- Easier to replace lost cards
- Phone app – like Starbucks card
- Increase locations, access to kiosks
- Clear directions for how to access and descriptions of the product/service riders need

Public Responsiveness

- Positive response from the community – get their feedback

Next steps

DeAnna indicated that the goal input would be used to describe and assess fare options Metro will bring to the group at the next meeting and out to the public for broader feedback in April. She spoke briefly about the public engagement plan as a whole and invited participants to share names of organizations Metro should reach out to as stakeholders – for briefing or contracting with to conduct community-based outreach. She announced that the next meeting would be either April 4 or 5 from 3:30-5:30 and polled the group as to which date they preferred.

Adjourn

Fare Review Advisory Group Workshop #2

Meeting Summary

April 4, 2017

King Street Center

DOT Director's Office Conference Room

201 South Jackson Street, Seattle

3:30 – 5:30 p.m.

Participants

- Aaron Morrow, King County Transit Advisory Commission
- Anne Eskridge, University of Washington, Transportation Services
- Arielle Washington, Urban League of Metropolitan Seattle
- August DeVries, Bellevue Downtown Association/TransManage
- Cliff Cawthon, Rainier Beach Action Coalition
- Daniel Heldring, Microsoft
- Daphne Pie, Public Health – Seattle King County
- Ezra Bason, Metro Transit operator
- Gail Gustavson, International Community Health Services
- Hester Serebrin, Transportation Choices Coalition
- Hillary Coleman, Seattle-King County Coalition on Homelessness
- Janelle Rothfolk, Catholic Community Services of King County
- Jeff Keever, Seattle Central College
- Katie Wilson, Transit Riders Union
- Kendle Bjelland, Commute Seattle

Absent

- Claire McDaniel, Sound Generations
- Hope Drumond, Alliance of People with disAbilities
- Kimberly Heymann, Alliance of People with disAbilities

Welcome and introductions

Chris O'Claire, Assistant General Manager of Planning and Customer Services, King County Metro, welcomed the group and provided a brief recap of the last meeting and an overview of the purpose and content of this meeting.

DeAnna Martin, Community Relations Planner, King County DOT, introduced staff present and invited participants to introduce themselves. She reminded people of the group guidelines.

Background on Metro's actions to address affordability and access

Matt Hansen, Manager of Customer Communications & Services, King County Metro, provided an overview of actions Metro is currently taking to increase access to and affordability of transit. (See handout entitled, "Current Metro Activities to Improve Access and Affordability")

Matt shared that the first round of ORCA LIFT cards will expire this month. The cards will still be usable, but will revert to regular adult ORCA cards so users would end up being charged a regular adult fare. To notify users of the expiration, Metro has:

- Information on all buses to notify riders
- Posters up at all enrollment and ORCA retail locations
- Sent letters to all affected users
- Launched an online renewal process – 300 have already renewed
- Multi-lingual notices have also been produced and distributed to enrollment and retail locations
- The expiration date is also listed on the card itself

Meeting participants asked whether when people renew their ORCA LIFT card their balance can be transferred. The answer is it can. Participants also expressed interest in seeing and getting copies of the materials – posters, brochures – to help spread the message to their constituents.

Regarding a lack of knowledge about the availability of an ORCA day pass, many participants expressed their own lack of knowledge about this product. They asked several questions about how it can be used and where it can be purchased. Participants encouraged staff to make the day pass option more visible to customers perhaps even sending out a general announcement that this option exists. Staff promised to follow up with more detail about the pass, how it works, and how to purchase.

After sharing additional actions related to waving card fees, addressing youth ORCA card access when school is not in session, and college student transit affordability, participants had the following questions and comments:

- How has Metro done in reaching out to college students to increase ORCA LIFT enrollment? Answer: Metro did 14 outreach events at colleges in 2015; in 2016, Metro did 42; these outreach events are a focus.
- Do college freshman welcome packets, does it provide PH and Metro information? Answer: It depends on the school.
- Metro needs to do the ORCA LIFT materials in more languages
- Card replacement fee is a barrier; a \$5 expense for someone with low income is a big deal so getting rid of the fee is a great idea

Introduction to fare change options for zone/peak surcharges

Chris provided some general background on fares and goals of simplifying Metro's fares. Then, she presented five options Metro had developed to consider simplifying fares. (See handout entitled, "Metro Fare Options")

She shared that it's important for Metro to understand the current structure, based on the feedback from last meeting, and that our goal is to make sure transit is accessible to everyone. Fares need to recover 25-30% of the operating cost to provide the service, the rest comes from sales tax. Projecting how a fare change will affect ridership assumes that if fares go up there will be an adjustment to the supply and demand ratio. Metro's fares need to reflect the cost of service. Metro would like to learn from the group whether we have the right options and how we might mitigate any negative effects of any of the options. All of Metro's analyses are not complete at this moment, there is more work to do.

About all options – participants:

- Suggested increasing ORCA LIFT eligibility as a way to mitigate the effects on affordable access for those who would experience a fare increase.
- Wanted more detail on what the revenue increases and decreases meant in terms of service impacts or how additional revenue would be spent.
- Asked staff to consider the impacts on families – an increase in the adult fare would have an effect on the whole family when choosing to ride transit.

About Option B – a \$2.75 flat fare

Comments included:

- The increase in fare for off-peak riders could be mitigated by increasing the transfer window.
- This option has a good equity message to reduce geographic and historic inequities.
- Concern expressed about the brunt of the fare increase being born by the middle class.

About Option C – Local fare \$2.50, Express fare \$3.25

Comments included:

- How would Metro classify an express type service? – express really needs to be faster and fewer stops from a customer perspective.
- How does the RapidRide play a part?
- Deep concern expressed about “penalizing” people who live farther away from Seattle.
- Charging people more because they live far away from Seattle could hurt those who are poor and have to live far away because the cost of living is so high – include housing affordability, race, and class in an analysis of the options if possible.
- This option would introduce fare confusion and route confusion – customers would need to re-educated.
- Metro would need a really good explanation of the rationale for this type of fare structure.
- If this option is selected, make sure there is redundancy on the routes selected as Express – meaning a local option that people can pay a lower fare to ride
- There are advantages for operators on many levels; although this option would still lead to questions from riders.

About Option E – Peak Fare High (\$3.00)

Comments included:

- Both Options D and E seem to have the biggest effect on those who are most likely to be paying their fare with an employer-provided pass and would, therefore, be the least price sensitive.
- There would be operator issues in a logistical sense. Current peak pricing is based on the run (i.e. when the bus leaves the base). If the fare were to change in the middle the run, it seems difficult to implement. For example, there's more involved than just the technology of the ORCA card reader. Operators manually place a fare card into the fare box.

Participants asked:

- Do these fare changes effect businesses?
- When would these changes occur? Answer: estimated at 2019 for this analysis
- Would Metro consider raising the youth age to 20?

Feedback, discussion of fare change options for zone/peak surcharges

Advisory group members were given a set of sticky dots to allocate to the fare options they preferred. The options were ranked in the following way:

1. Option B – flat fare \$2.75
2. Option A – flat fare \$2.50
3. Option E – peak fare high \$3.00
4. Option C – local fare \$2.50, express fare \$3.25
5. Option D – peak fare low \$2.75

In general discussion about the dot allocation, participants made the following comments:

- Concern expressed that now changes are being considered Access riders, yet fare changes are due. Whatever happens with Access riders, this needs to be

consistent with Access fares and make sure it doesn't make it more difficult for riders to use both and transit between the two.

- What would happen with the fare revenue lost or gained?
- How is running the bus cheaper during the day compared to during the peak?
Answer: Metro's fleet and operations system is based on operating the most service during heavy peak periods. This will flatten out over time as Metro moves more and more towards the Metro Connects Vision. It costs more to operate and maintain our peak service and we're at capacity now.
- Suggestion to charge around events or activities; on different days of the week – e.g. charge a higher fare for routes serving Capitol Hill during late night on Friday and Saturdays.

Sound Transit update

Chad Davis, from Sound Transit, provided a brief update on Sound Transit's fare-related planning effort. He explained that they would be going to their Board in the coming months to get approval and direction to move forward with their planning effort. If approved, planning and related public outreach would occur later this year or early in 2018.

Next steps

DeAnna provided a quick recap of the next steps in the process. Feedback from this meeting would inform a smaller set of options that Metro will be taking out to the broader public for their input. A second round of public engagement, including a second online questionnaire and some public meetings, will take place in mid-April to early May. Outreach with community-based organizations is getting underway to conclude in mid-May. Metro expects to reconvene the advisory group for a third meeting in May once outreach is complete to inform the group of the adult fare change option they intend to recommend to the Executive and to share and get feedback from the group on longer term research and program efforts to address access and affordability and speeding up boarding.

Adjourn

Fare Review Stakeholder Advisory Group Workshop #3

Meeting Summary

May 18, 2017
King Street Center
DOT Director's Office Conference Room
201 South Jackson Street, Seattle
3:00 – 5:00 p.m.

Participants

- Aaron Morrow, King County Transit Advisory Commission
- Anne Eskridge, University of Washington, Transportation Services
- Arielle Washington, Urban League of Metropolitan Seattle
- Ezra Bason, Metro Transit operator
- Hillary Coleman, Seattle-King County Coalition on Homelessness
- Janelle Rothfolk, Catholic Community Services of King County
- Jeff Keever, Seattle Central College
- Katie Wilson, Transit Riders Union

Absent

- August DeVries, Bellevue Downtown Association/TransManage
- Claire McDaniel, Sound Generations
- Cliff Cawthon, Rainier Beach Action Coalition
- Daniel Heldring, Microsoft
- Daphne Pie, Public Health – Seattle King County
- Gail Gustavson, International Community Health Services
- Hester Serebrin, Transportation Choices Coalition
- Hope Drummond, Alliance of People with disAbilities
- Kimberly Heymann, Alliance of People with disAbilities
- Kendle Bjelland, Commute Seattle

Welcome and introductions

DeAnna Martin, Public and Employee Engagement Manager for King County Metro Transit, welcomed participants and reminded them of the groundrules. She provided a brief overview of where we are at in the planning and engagement process and reviewed the meeting purpose and agenda with the group.

How Metro went from five to two options – analysis, final feedback

Chris O’Claire, Assistant General Manager of Customer Communication at King County Metro Transit, shared that staff had an opportunity to evaluate fares because Metro decided to put a pause on planned fare increases. They stressed that this is the first phase in this process and emphasized the need to make a decision on simplification this year for regional coordination on ORCA Next Generation. A participant asked when the Request for Proposals to identify an ORCA Next Generation vendor would go out. Staff responded this fall.

Jana Demas, Supervisory of Strategic Planning at King County Metro Transit, reviewed the options that were eliminated and why. Participants asked:

- Q: What was the farebox recovery projection if a \$2.50 flat fare option were implemented? A: Below the minimum target of 25%.
- Q: How would each option effect crowding on buses? A: It’s hard to say. The modeling we do for projected ridership predicts increase in ridership, but we can’t predict or estimate on which routes this will happen. We have a separate planning and investment process to identify where and how to address overcrowding, so if this is a result, we’ll be aware.
- Q: Is Metro considering businesses’ willingness to work with Metro if this raises their costs? A: Yes, we are always actively working with employers and trying to grow employer participation in providing transit benefits to their employees.

Jana invited any comments or questions on the remaining two options taken out for public comment, a \$2.57 Flat Fare options and \$2.50 off-peak/\$3 peak Fare option. Participants had the following questions and comments about the equity and social justice impacts of each:

- Q: What is does average adult fare mean?
- Q: Did Metro look at eliminating the peak and why having the peak/off-peak difference would affect low income and minority routes more?

DeAnna provided a high level overview of feedback received from the general public on two adult fare change options. (See powerpoint slides for details.) She also provided a summary of results of an employer account questionnaire conducted during the second phase of engagement.

One member asked if participants could receive a copy of the employer results. Staff responded they could and that Metro is preparing a full summary/report of all feedback received.

DeAnna asked whether the group had any additional feedback on the final two options. Participants shared:

- A flat fare is easier to understand for people with disabilities, fixed incomes, seniors, English Language Learners. The \$2.50/\$3.00 fare is more complex.
- From an operator perspective, simplification is good. But, concern was expressed about crowding as it affects speed of boarding and operations. If a simplified fare increases ridership, this could be a result.
- Q: has Metro done any studies about going to a Rapid Ride-type system to see if it makes the system more efficient and cost effective? A: costs would go up in terms of fare enforcement and off board fare payment but it is something we continue to consider.
- The university and colleges are concerned about how the options will affect their cost. They would really like Metro to consider a student class or student rate to address that concern. Since ridership is self-administered by institutions the chance of fraud is low to no.
- Q: Do students qualify for ORCA LIFT? A: Some do, but eligibility is not universal. For example, international students cannot qualify.
- Q: Has Metro run numbers for college student fare? A: not as part of this process. Participants encouraged staff to look at different numbers and to do some analysis.
- Q: How would a student fare be defined and administered. A: through the university or college. Q: Do universities pay the full fare? A: Yes, based on a trip rate determined by when users travel and what services the population uses most. The UW gets a slight discount based on the amount of their pass holders who qualify for youth or senior discounts.
- How do each of these options affect fare enforcement? Will Metro continue to do this? A: it has its challenges; but, fare evasion is only 5% and there are only six routes that have fare enforcement. Those are Metro's Rapid Ride lines.

Transit affordability – current and planned efforts, feedback

Penny Lara, Transportation Planner in Metro's Market Development section, shared work she had done on a grant-funded project to increase ORCA usage among harder to

reach populations. She shared some of the results of what she learned from a questionnaire she conducted during this project – namely that people who speak English as a second language weren't understanding how to use ORCA. She worked to develop some materials and videos that use more imagery than lingo to describe the card and how to use it. She will share the videos when they are complete.

One member encouraged Metro to develop a similar version of the materials with ORCA LIFT fares.

Matt Hansen, Manager of Customer Communication, King County Metro Transit, provided an overview of Metro's efforts to address transit affordability. (See slides for details.)

He asked whether it would be worthwhile to reconvene the student fare group. Seattle Central College and UW would like to reconvene. Seattle Central College just launched an all campus questionnaire asking students if they would be willing to pay for a UW-type program. Their board also increased the amount it will subsidize. Staff will reach out to people who were part of the process and initiate reconvening.

Staff shared that ORCA LIFT is nearing 50,000 enrollees, but there is still more to learn and do. An issue was raised at the first meeting about a replacement fee on ORCA LIFT cards that are lost or stolen. Staff reported that Metro has eliminated that replacement fee.

There is early indication from a Human Service Ticket Program provider questionnaire that agencies would like to buy more tickets if possible.

Participants asked:

- Q: What is the barrier to online enrollment for ORCA LIFT. A: Trying to be as inclusive as possible without being reckless and creating conditions that would make it easier for fraudulent activity.
- Q: Will the cost of the fare for the human service demonstration be the same price as for nonprofits. A: Yes, would offer LIFT passes at 10% of price.
- Q: Can school cards continue to work after school year (even if no subsidy). A: Metro is in process working with school districts on this issue. The earliest a change could be made is summer of 2018.
- Q: What does "registered seniors" mean? There is confusion between seniors and drivers when they use a human service ticket to pay their fare. It would help

if Metro used the same signage and consistent terms in all fare-related information.

- Comment: it's confusing that youth don't need proof, but seniors do.
- Q: Could the taxi scrip program be used as a filler for the last mile home as an incentive to get Access paratransit users to transit. People living far away often wonder how they get to transit.
- Q: What is the timeline for completing the human service ticket program provider questionnaire and acting on the results? Participants would like to see the results of the questionnaire.
- Comment: SDOT has said they approve combo tickets being used on Seattle streetcars. Q: Has progress been made with communication between SDOT and Metro to confirm and implement this?
- Q: Can human service ticket program providers use day pass/combo tickets for their clients? It would also be helpful to be able to mail tickets to a client to get to the agency without having to fill out forms in advance. Q: Is there a way to lessen requirements? And, is there an easier way to associate Regional Reduced Fare Permits to business accounts? A: no, but staff wish there was.
- Q: Why do ORCA LIFT cards need to be physically replaced at time of re-enrollment? Why can't the card continue to be used if someone's eligibility continues? A: It's a vendor issue, but trying to change this with ORCA Next Generation.

DeAnna invited participants to help inform Metro's next efforts to research the needs of hard to reach populations in order to understand barriers to fare payment and identify action steps to address those barriers. Participants made the following comments:

- Metro should better utilize space on the bus to educate people about how to use ORCA. Make information about where to reload card more available. Could there be a bigger effort to put posters on buses and give concrete places to go?
- The \$5 card fee is also problematic. Metro thinks of customers as well off (park & ride, etc) but there are a lot of people who don't fit description. There is also a high percentage of "unbanked" riders who need to use cash. Metro should do more advertising on how you can use ORCA in an unbanked way.
- It's hard for a lot of people to put aside money to put on a card. Some fear where personal information associated with the card goes and who has access to it.

- LIFT is unfortunate name. It sounds too much like LYFT.

DeAnna paraphrased these comments to say Metro should be researching why people aren't using ORCA and paying with cash.

- What about people who end up paying more over time because they cannot afford the up-front costs of a monthly pass? There should be a monthly and day pass fare cap to help people who can't afford a monthly pass all at once so that if they reach that monthly pass amount, they won't be charged more than that. There was a lot of support for this idea among participants.
- Comment: Some people get assistance at different times, so having a monthly base operate on a 30 day schedule (rather than starting at the beginning of the month) might help.
- The fare cap idea would help with this.

DeAnna asked whether there was anything else Metro is missing that should be considered. Participants offered the following comments and questions:

- The human service ORCA pilot idea is a good one.
- Metro should investigate a Calgary-style low income transit pass that is offered on a sliding scale.
- Very curious about barrier for \$5 fee. Is this actually a barrier or is that just perception?
- Catholic Community Services does lots of replacement cards (10-15/week). At \$3 replacement fee per card, this adds up for them. They could use that money in other ways to provide service. It would be great to have a lanyard or something to give to clients because stuff gets stolen all the time (lost, misplaced, etc) and to help prevent this.

Next Steps

Staff asked whether the group would be interested in being assembled again for an update and/or to provide additional feedback. DeAnna shared a revised timeline for next steps. Staff originally expected that a fare simplification ordinance would go to King County Council in June, but now it's looking more like that would happen in August.

Adjourn

Stakeholder Briefings

Seashore Forum	March 7, 2017
South County Mobility Coalition	March 9, 2017
Eastside Transportation Partnership	March 10, 2017
ORCA LIFT enrollers monthly meeting	March 13, 2017
Eastside Easy Rider Collaborative	March 28, 2017
South County Area Transportation Board	April 18, 2017
King County Transit Advisory Commission	April 18, 2017
Seattle Transit Advisory Board	April 26, 2017
North County Mobility Coalition	April 27, 2017
King County Mobility Coalition-Access to Work and School Committee	May 9, 2017
King County Mobility Coalition	May 16, 2017
UW U-PASS Student Advisory Board	May 18, 2017
UW Transportation Committee	May 22, 2017

Exhibit B – Media and Social Media

On March 23, 2017, Metro issued a news release (http://www.kingcounty.gov/depts/transportation/news/20170419_Fare_Proposals.aspx) to announce the fare review process and invite community members to take an online questionnaire. Metro issued a second news release April 19 (http://www.kingcounty.gov/depts/transportation/news/20170419_Fare_Proposals.aspx) to announce a second online questionnaire and second round of outreach on two options for fare simplification. Both releases were distributed via email to mainstream news outlets, blogs, and ethnic media, and posted to the King County Metros' website. Coverage included KIRO-TV, Q-13, the West Seattle Blog and the Seattle Transit Blog.

Metro also provided embargoed materials to the Seattle Transit Blog, which published an exclusive report on the morning of April 19 to announce the second online questionnaire on two fare options – A \$2.75 flat fare or peak period fare of \$3 and off-peak fare of \$2.50. ([Seattle Transit Blog: Metro proposes doing away with zoned fares](#))

A link to the questionnaire was posted on Metro's Facebook page and reached more than 2,800 people. Metro also hosted an online forum via Facebook live that drew XX participants to ask questions of staff. Metro tweeted four times about the fare review process to more than 100,000 followers. The tweets included links to the questionnaires and press releases, and generated more than 21,000 impressions and 207 clicks onto links to the questionnaire.

King County Metro four tweets went out to more than 100,000 followers with links to the online questionnaires and to the press releases. The tweets generated a total of more than 21,000 impressions and 207 clicks to the questionnaire links in the tweets. (examples of tweets below)



King County Metro 🚌 @kcmetrobus
Metro seeks public comment on 2 options for simplifying bus fares.
http://kingcounty.gov/about/news/public-feedback.aspx?pd_url=https%3A%2F%2Fwww.peakdemocracy.com%2Fportals%2F262%2Fissue_4828#peak_democracy...
pic.twitter.com/KBOHQMH7s5

King County Metro 🐦 @kc.metrobus

Metro is exploring options to simplify bus fares - take our online survey by May 5 and give us feedback.

<http://metrofutureblog.wordpress.com/2017/04/21/have-a-say-on-simpler-bus-fares/> ...



King County Metro 🐦 @kc.metrobus

Metro invites customers to take this survey as we consider ways to simplify bus fares:

<http://kingcounty.gov/about/news/public-feedback.aspx?>

pd_url=https://www.peakdemocracy.com/portals/262/Issue_4735#peak_democracy ...
pic.twitter.com/nkR2G4bXge



King County Metro 🐦 @kc.metrobus

Metro seeks public input on ways to simplify bus fares.

<http://kingcounty.gov/depts/transportation/metro/programs-projects/fare-review.aspx> ...

pic.twitter.com/VgVHRtAAQ

Media coverage

Seattle Transit Blog: Metro proposes doing away with zoned fares, 4/19/17

<https://www.seattletransitblog.com/2017/04/19/metro-to-do-away-with-zoned-fares/>

Seattle Transit Blog: Metro fare proposals lack cash disincentives

<https://www.seattletransitblog.com/2017/04/22/metro-fare-proposals-lack-cash-disincentives/>

King County Metro considers simplifying bus fares, 3/29/17

<http://www.kiro7.com/news/local/king-county-metro-considers-simplifying-bus-fares/507272153>

West Seattle Blog: Metro bus fares: New questionnaire, asking you about 2 options for 'simpler' fares, 4/19/17

<http://westseattleblog.com/2017/04/metro-bus-fares-new-questionnaire-asking-you-about-2-options-for-simpler-fares/>

West Seattle Blog: Questions for you – Metro launches questionnaire, hoping to simplify fare-paying

<http://westseattleblog.com/2017/03/questions-for-you-metro-launches-questionnaire-hoping-to-simplify-fare-paying/>

Curbed: King County Metro looks to simplify transit fare, 3/24/17

<https://seattle.curbed.com/2017/3/24/15055080/king-county-metro-fare-overhaul>

CHS Capitol Hill Seattle: Metro wants feedback on simplifying fares, 3/27/17

<http://www.capitolhillseattle.com/2017/03/metro-wants-feedback-on-simplifying-fares/>

Time for a Fare Overhaul? Metro seeking comment this spring, 3/24/2017

<https://www.seattletransitblog.com/2017/03/24/time-for-a-fare-overhaul-metro-seeking-comment-this-spring/>

Exhibit C – Questionnaire Questions

Please note: raw questionnaire data with personal identifying information removed can be provided upon request.

Public Questionnaire 1 – Online from March 23 through April 7

Metro Transit wants your input on ways to simplify fare payment. Please tell us what you think by April 7.

Introduction

Today, Metro customers are faced with a complex fare structure, including a surcharge during peak commute hours, and another surcharge for trips that cross a zone boundary during those same peak hours. **This system can be difficult for customers to understand**, and it doesn't align with the fares of our partner agencies who also use the ORCA farecard system.



As we prepare for the modernization of ORCA technology, Metro and the other ORCA agencies are looking for ways to simplify fares and make them more consistent across agencies. Metro is also exploring ways to speed up boarding, improve driver safety, help increase ridership, and help reduce barriers to using transit for vulnerable populations.

As we develop these fare options and longer-term projects, we'll reach out to our riders and organizations—such as employers, schools, and public service agencies—that provide farecards to the people they serve.

We want to make sure our work on fare payment over the next two years will reflect our customers' needs and desires.

That's why, this month, we're asking the public to give us feedback on ways we could change our fares.

We also want your feedback on longer-term, fare-related projects. Next month, we'll ask for feedback on a specific set of fare change options with a follow up questionnaire and a series of open houses.

If you need this questionnaire in an alternate format, please contact DeAnna Martin, community relations planner, at 206-477-3835 or deanna.martin@kingcounty.gov.

To stay informed about this project, sign up for updates at the end of the questionnaire or visit Metro's website:

<http://kingcounty.gov/depts/transportation/metro.aspx>

Your personal transit use

During a typical week, how often do you ride the following types of transit?

	never	less than once a week	one or two days a week	three or four days a week	five or more days a week
King County Metro Transit buses					
Sound Transit Link light rail service					
Sound Transit Sounder service					
Sound Transit Regional Express bus service					
Bus service provided in a county that borders King County (e.g. Community Transit, Pierce Transit, or Kitsap Transit)					
King County Water Taxi					
Washington State Ferries					
Seattle Streetcar					

Metro Access paratransit					
Metro Vanpool or Vanshare					
Private employer-provided shuttle (example: Microsoft Connector)					

If you use transit, for what purpose(s) do you ride public transportation? (Check all that apply)

- To/from work
- To/from school
- To/from volunteering
- To/from shopping or errands
- To/from appointments
- To/from recreation, social, religious, or cultural events
- To/from special events
- To/from airport
- Not applicable, do not ride public transportation
- Other

Personal fare payment

When you use public transportation how do you most commonly pay your fare (choose one):

- ORCA card
- Regional Reduced Fare Permit
- U-Pass
- Cash
- Transit Go mobile ticket
- Metro Access monthly pass

- Metro Monthly Vanpool Pass and Transportation Voucher
- Human service ticket
- Not applicable, do not ride public transportation

If you selected ORCA, what type of ORCA product do you have?

- ORCA Monthly Pass that I pay for
- ORCA E-purse that I pay for
- ORCA employer-provided pass
- ORCA employer-provided E-purse
- ORCA pass provided by my college or university
- ORCA school-provided pass (high school and middle school students)
- ORCA LIFT Monthly Pass
- ORCA LIFT E-purse
- ORCA youth pass
- ORCA youth E-purse
- ORCA Regional Day Pass
- I use multiple products depending on my trip purpose

If you selected ORCA, how do you usually purchase your ORCA pass or put money in your e-purse?

- My employer, school or social service agency does it for me
- Online
- Auto-load
- At a retailer
- Ticket vending machine
- Metro Customer Service Office

If you selected Regional Reduced Fare Permit, do you pay by:

- Cash
- Monthly Pass
- E-purse

If you selected Cash, why do you pay your fare with cash? (check all that apply)

- I don't ride often enough

- It's easier to pay with cash/ticket
- I don't have a debit/credit card
- There are no convenient locations where I can get or add value to an ORCA card
- I'm concerned about losing an ORCA card
- I can't afford the fee to purchase an ORCA card
- I don't want to pay the fee to purchase an ORCA card
- I haven't gotten around to getting an ORCA card
- I don't know about ORCA
- Other _____

Your experience with paying fares

How easy to understand are Metro's fares?

- Very easy
- Easy
- Difficult
- Very difficult
- Not applicable

How easy is it to pay your fare?

- Very easy
- Easy
- Difficult
- Very difficult
- Not applicable

How satisfied are you with your ability to pay your fare when transferring between different agency's services?

- Very Satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very dissatisfied
- Not applicable

How confident are you that you are paying your fare in a way that is most affordable to you?

- Very confident
- Somewhat confident
- Not confident
- Not applicable

Is the cost to ride affordable for you?

- Yes
- No
- Sometimes

Why?

How aware are you of the following Metro reduced fare options and programs?

	very aware	somewhat aware	somewhat unaware	very unaware	not applicable
Regional Reduced Fare Permit for people 65 and older or people with disabilities					
Youth fare for children ages 6-18 (children age 5 and under ride for free)					
ORCA LIFT reduced fare for income-qualified adults					
Metro's Human Service Ticket Program, which sells					

discounted bus tickets to participating human and social service agencies to provide to their clients					
---	--	--	--	--	--

What one thing would you suggest to improve Metro’s fare payment system?

As we plan changes, what’s most important to you?

As we consider fare changes in the next two years, Metro will evaluate options based on the policies adopted by the King County Council (see below).

Which of these policies do you think are most important? You've got 10 points to 'spend' on the options below. Place a number next to each option, totalling 10 overall.

___ Make Metro’s fares easier to understand and pay.

___ Make Metro’s fares more consistent with those for Sound Transit buses, Link light rail, and Seattle Streetcar.

___ Meet Metro’s farebox recovery target to fund bus service

___ Make boarding faster.

___ Reduce fare collection costs.

___ Improve safety for bus drivers and customers.

___ Charge more for more-expensive services.

___ Increase ridership.

___ Improve affordability for low-income customers.

___ Other: _____

(Total should be 10)

Demographic questions (optional)

This information will be used for analysis only, including to make sure we are hearing from a representative cross-section of our community. The information will not be shared or used for any other purpose other than to understand who King County is hearing from.

What is the zip code where you live? _____

Are you currently... (check all that apply)

- Employed or self-employed full-time
- Employed or self-employed part-time
- A middle school student
- A high school student
- A college or university student
- A homemaker
- Retired
- Currently not employed

Do you...

	Yes	No	Prefer not to say
Have a valid driver's license?			
Have access to a vehicle for personal use?			
Have children under 18 living at home?			

What gender do you identify as?

- Male
- Female
- I'd rather not say

What is your age?

- 15 or younger
- 16-17
- 18-19
- 20-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65 or older
- I'd rather not say

Please choose one or more races you consider yourself to be:

- White
- Black or African American
- American Indian or Alaskan Native
- Asian or Pacific Islander
- Multi-race
- Hispanic (Mexican, Mexican American, Chicano, or Latino)
- Rather not say
- Other _____

What is the primary language you speak at home?

- English
- Amharic
- Chinese (Mandarin, Cantonese, etc.)
- Korean
- Punjabi
- Russian
- Somali
- Spanish
- Ukranian
- Vietnamese
- I'd rather not say

- Other _____

If you have a disability that affects your mobility, please indicate which kind (check all that apply)

- Mobility
 Vision
 Hearing
 Cognitive
 None
 Other

Including yourself, how many people live in your household?

- 1
 2
 3
 4
 5
 6
 7
 8+
 I'd rather not say

[Depending on household size, respondents were asked whether their annual household income was above or below a certain amount. If above, they were asked what their household income range was using the following ranges]

- \$15,001 to \$23,760
 \$23,761 to \$32,040
 \$32,041 to \$40,320
 \$40,321 to \$48,600
 \$48,601 to \$56,880
 \$56,881 to \$65,160
 \$65,191 to \$73,464
 \$73,465 to \$81,870
 \$81,871 to \$100,000
 \$100,001 to \$150,000

- \$150,001 or more
- I don't know
- I'd rather not say

Process and staying engaged

How did you hear about this questionnaire? (check all that apply)

- News media
- Metro Matters blog
- Metro email or text alert
- Twitter
- Facebook
- Friend or family member
- My employer
- My elected official or city
- An organization I'm involved with
- Other

The notice to learn more and participate was clear and welcoming:

- Strongly agree
- Somewhat agree
- Neutral / no opinion
- Somewhat disagree
- Strongly disagree

Do you feel you were notified in time to provide meaningful feedback?

- Yes
- No
- Not sure

Please share any additional feedback you have about our outreach.

Thank you!

Please provide your email if you would like to sign up to receive updates on this project.

(Please note this email will only be visible to project staff who will use it to contact you about this project. Your questionnaire answers will not be associated with your email account.)

Your email: _____

Public Questionnaire 2 – online from April 19 through May 5

Introduction

Metro's current adult fare structure is complex. It includes extra charges for travel during weekday peak commute hours and for trips that cross a zone boundary during those peak hours. This can confuse riders, slow down boarding, and lead to fare



disputes that jeopardize driver safety. Our fare structure is also different from those of other transit agencies that use the ORCA fare card system.

For these reasons, Metro is exploring options to simplify our fare structure and make it consistent with other agencies. While this process may lead to fare changes, it is also possible that the current Metro fare structure will not be changed. **Our goal is to make**

transit more accessible for everyone.

About 4,500 people took our first questionnaire. We learned that customers support changing Metro's fare structure. One-third of all respondents want fares that are easier to use and understand. Bus drivers told us simpler fares would speed up boarding and travel time, and would help keep drivers and passengers safe by reducing fare disputes. We also heard that we should consider the increasing number of people living outside the Seattle zone boundary, in suburbs where housing is more affordable. [View the first questionnaire results.](#)

We used this feedback to develop two new fare options. We tried to balance several goals: simplify our fare structure, increase ridership, improve safety, decrease travel time, reflect the cost of service, and reduce barriers to using transit for vulnerable populations.

Now we're asking for public feedback on the two adult fare options:

- A single adult fare of \$2.75, good any time for any distance

- A peak-period adult fare of \$3.00 and an off-peak adult fare of \$2.50, with no extra charge for two-zone travel.

No fare changes for youth, senior, disabled, ORCA LIFT, or Access are being considered.

With either option, Metro is planning or already taking actions to make ORCA and transit more accessible and affordable for vulnerable populations.

We invite you to complete this questionnaire.

If you need this questionnaire in a different format, please contact DeAnna Martin, community relations planner, at 206-477-3835 or deanna.martin@kingcounty.gov.

Your personal transit use

During a typical week, how often do you ride the following types of transit?

	never	less than once a week	one or two days a week	three or four days a week	five or more days a week
King County Metro Transit buses					
Sound Transit Link light rail service					
Sound Transit Sounder train					
Sound Transit Regional Express buses					
Bus service provided in a county that borders King County (e.g. Community Transit, Pierce Transit, or Kitsap Transit)					

King County Water Taxi					
Washington State Ferries					
Seattle Streetcar					
Metro Access paratransit					
Metro Vanpool or Vanshare					
Private employer-provided shuttle (example: Microsoft Connector)					

For what purpose(s) do you ride public transportation? (Check all that apply)

- To/from work
- To/from school
- To/from volunteering
- To/from shopping or errands
- To/from appointments
- To/from recreation, social, religious, or cultural events
- To/from special events
- To/from airport
- Not applicable, do not ride public transportation
- Other

Personal fare payment

When you use public transportation how do you most commonly pay your fare (choose one):

- ORCA card
- Regional Reduced Fare Permit
- U-Pass
- Cash
- Transit Go mobile ticket

- Metro Access monthly pass
- Metro Monthly Vanpool Pass and Transportation Voucher
- Human service ticket

If you selected ORCA, what type of ORCA product do you have?

- ORCA Monthly Pass that I pay for
- ORCA E-purse that I pay for
- ORCA employer-provided pass
- ORCA employer-provided E-purse
- ORCA pass provided by my college or university
- ORCA school-provided pass (high school and middle school students)
- ORCA LIFT Monthly Pass
- ORCA LIFT E-purse
- ORCA youth pass
- ORCA youth E-purse
- ORCA Regional Day Pass

If you selected ORCA, how do you usually purchase your ORCA pass or put money in your e-purse?

- My employer, school or social service agency does it for me
- My employer, school or social service agency adds a subsidized amount
- Online
- By phone
- By mail
- Auto-load
- At a retail store
- Ticket vending machine
- Metro Customer Service Office

If you selected Regional Reduced Fare Permit, do you pay by:

- Cash
- Monthly Pass
- E-purse

If you selected Cash, why don't you use an ORCA card? (check all that apply)

- I don't have a debit/credit card
- There are no convenient locations where I can get or add value to an ORCA card
- I'm concerned about losing an ORCA card
- I can't afford to buy an ORCA card
- I don't want to pay the fee to purchase an ORCA card

- I haven't gotten around to getting an ORCA card
- I don't know about ORCA
- I don't want to carry another card
- I don't ride often enough
- It's easier to pay with cash/ticket
- Other _____

We're considering two options to make buses faster, safer, and easier to use.

We have identified two adult fare options that could simplify fares and achieve one or more of our goals related to fares.

No changes are being considered for youth, seniors, riders with disabilities, ORCA LIFT, or Access.

Single adult fare of \$2.75.

No extra charges for peak or two-zone travel. Ride any time, any distance for \$2.75.

Please indicate whether you agree or disagree with the following statements on the single adult fare of \$2.75 option:

	strongly agree	somewhat agree	neutral	somewhat disagree	strongly disagree
This fare option is easy to understand.					
This fare option would make it easier and faster for people to get on the bus.					

This fare option is equitable for riders.					
This fare option is affordable.					
I would ride the bus more often if this was the fare.					
I like this option.					

Off-peak adult fare of \$2.50. Peak period adult fare of \$3.00.

No extra charge for two-zone travel. Keep the current extra charge for peak travel (between 6-9 a.m. and 3-6 p.m. weekdays) to reflect the higher cost of providing service in peak travel times.

Please indicate whether you agree or disagree with the following statements on the off-peak adult fare of \$2.50 with the peak period adult fare of \$3.00 option:

	strongly agree	somewhat agree	neutral	somewhat disagree	strongly disagree
This fare option is easy to understand.					
This fare option would make it easier and faster for people to get on the bus.					
This fare option is equitable for riders.					

This fare option is affordable.					
I would ride the bus more often if this was the fare.					
I like this option.					

Our goal is to make transit more accessible for everyone. That’s why Metro is exploring programs that could reduce any impacts of this proposed fare change on affordability and transit access. We are considering if we can include these potential solutions in our long-term plan.

Please allocate your 10 dots to the options that would help keep transit affordable:

- + - Expand the ORCA transfer time to more than two hours
- + - Provide one free youth fare with the purchase of one adult fare to make riding the bus more affordable for families
- + - Create a student fare for anyone enrolled in a university or college
- + - Raise the income limit to qualify for ORCA LIFT
- + - Expand outreach about ORCA LIFT so everyone who is eligible will know they can get a reduced fare

What other ideas do you have for ways to make ORCA and transit more accessible and affordable?

Demographic questions (optional)

This information will be used for analysis only, including to make sure we are hearing from a representative cross-section of our community.

What is the zip code? _____

Are you currently... (check all that apply)

- Employed or self-employed full-time
- Employed or self-employed part-time
- A middle school student
- A high school student
- A college or university student
- A homemaker
- Retired
- Currently not employed

Do you...

	Yes	No	Prefer not to say
Have a valid driver's license?			
Have access to a vehicle for personal use?			
Have children under 18 living at home?			

What is your age?

- 15 or younger
- 16-17
- 18-19
- 20-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65 or older
- I'd rather not say

Please choose one or more races you consider yourself to be:

- White
- Black or African American
- American Indian or Alaskan Native
- Asian or Pacific Islander
- Multi-race

- Hispanic (Mexican, Mexican American, Chicano, or Latino)
- Rather not say
- Other _____

What is the primary language you speak at home?

- English
- Amharic
- Chinese (Mandarin, Cantonese, etc.)
- Korean
- Punjabi
- Russian
- Somali
- Spanish
- Ukranian
- Vietnamese
- I'd rather not say
- Other _____

If you have a disability that affects your mobility, please indicate which kind (check all that apply)

- Mobility
- Vision
- Hearing
- Cognitive
- None
- Other

Including yourself, how many people live in your household?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8+
- I'd rather not say

[Depending on household size, respondents were asked whether their annual household income was above or below a certain amount. If above, they were asked what their household income range was using the following ranges]

What is the correct range for your annual household income?

- \$15,001 to \$23,760
- \$23,761 to \$32,040
- \$32,041 to \$40,320
- \$40,321 to \$48,600
- \$48,601 to \$56,880
- \$56,881 to \$65,160
- \$65,191 to \$73,464
- \$73,465 to \$81,870
- \$81,871 to \$100,000
- \$100,001 to \$150,000
- \$150,001 or more
- I don't know
- I'd rather not say

Process and staying engaged

How did you hear about this questionnaire? (check all that apply)

- News media
- Metro Matters blog
- Metro email or text alert
- Twitter
- Facebook
- Friend or family member
- My employer
- My elected official or city
- An organization I'm involved with
- Other

Do you feel the notice to learn more and participate was clear and welcoming?

- Yes
- No

Do you feel you were notified in time to provide meaningful feedback?

- Yes

- No
- Not sure

Did you participate in Metro’s first questionnaire seeking input on ways to simplify fares?

- Yes
- No
- Not sure

Regardless of how you feel about the adult fare change options, do you see how public input shaped these choices?

- Yes
- No
- Not sure

Please share any additional feedback you have about our outreach.

To stay informed about this project visit Metro’s website or provide your email here

Your email: _____

Thank you

Please select Next> to ensure that your response is submitted

Employer questionnaire

Metro Fare Simplification - ORCA Employers**Welcome**

Metro's current adult fare structure is complex. It includes extra charges for travel during weekday peak commute hours (6 – 9 am and 3 -6 pm) and for trips that cross a zone boundary during those peak hours. This can confuse riders, slow down boarding, and lead to fare disputes that jeopardize driver safety. Our fare structure is also different from those of other transit agencies that use the ORCA fare card system.

For these reasons, **Metro is exploring options to simplify our fare structure** and make it consistent with other agencies. While this process may lead to fare changes, it is also possible that Metro may keep its current Metro fare structure. **Our goal is to make transit more accessible for everyone.**

Earlier this month, Metro solicited feedback from customers about how we can meet these goals. About 4,500 people took our first survey. We learned that customers do find Metro's fare structure complicated and support simplifying fares. One-third of all respondents want fares that are easier to use and understand. Bus drivers told us simpler fares would speed up boarding and travel time and help keep drivers and passengers safe by reducing fare disputes. We also heard that we should consider the increasing number of bus riders with low income living outside the Seattle zone boundary, where housing is more affordable.

We used this feedback to develop two new fare options. We tried to balance several goals: simplify our fare structure, increase ridership, improve safety, decrease travel time, reflect the cost of service, and reduce barriers to using transit for vulnerable populations.

Now we're asking for public feedback on the two adult fare options:

- A single adult fare of \$2.75, good any time for any distance. A \$99 monthly pass would be valid for all travel on Metro.
- A peak-period adult fare of \$3.00 and an off-peak adult fare of \$2.50 with no extra charge for two-zone travel. A \$108 pass would be valid for travel on Metro during peak hours, and a \$90 pass would be valid for off-peak travel.

No fare changes for youth, senior, disabled, ORCA LIFT, or Access are being considered.

Either option could affect the cost and decisions you make as an employer to provide the most cost-effective transit benefit to your employees. We want to understand how these options might affect you. Your perspective is important as we determine what fare simplification options to recommend to the King County Executive this summer.

We invite you to complete this questionnaire by May 12.

If you have questions about this process or the options, please contact DeAnna Martin, community relations planner, at 206-477-3835 or deanna.martin@kingcounty.gov.

Metro Fare Simplification - ORCA Employers

Tell us about your organization

1. How many employees does your organization provide a transportation benefit to?

- 0 - 25
- 26 - 50
- 51 - 100
- 100 or more

2. What type of ORCA employer account do you have?

- Choice
- Passport
- I don't know

Metro Fare Simplification - ORCA Employers

Your feedback on the options we're considering

3. Please indicate whether you agree or disagree with the following statements on the single adult fare of \$2.75 (\$99 monthly pass) option:

	Strongly agree	Somewhat agree	Neutral	Somewhat disagree	Strongly disagree
This option will make it easier to manage our transportation benefit account with Metro.	<input type="radio"/>				
I am concerned this option will increase our costs.	<input type="radio"/>				
This option provides more benefit to our employees.	<input type="radio"/>				
This option will increase our participation in providing transportation benefits to employees.	<input type="radio"/>				

4. Please indicate whether you agree or disagree with the following statements on the single adult fare of \$2.50 (\$99 monthly pass) with the peak period adult fare of \$3.00 (\$108 monthly pass) option:

	Strongly agree	Somewhat agree	Neutral	Somewhat disagree	Strongly disagree
This option will make it easier to manage our transportation benefit account with Metro.	<input type="radio"/>				
I am concerned this option will increase our costs.	<input type="radio"/>				
This option provides more benefit to our employees.	<input type="radio"/>				
This option will increase our participation in providing transportation benefits to employees.	<input type="radio"/>				

5. If you could do one thing to improve your experience as an ORCA employer account, what would you do?

Thank you for providing us with your feedback. Metro will use feedback from customers and employers to make a recommendation for fare simplification to the King County Executive early this summer.

If you wish to be kept informed about the next steps in this process, please check [Metro's project website](#).

Exhibit D – Community-based Organization Outreach

Contracted Community-Based Organization Outreach Guide

Overview

As part of the development of Metro's two-year fare work program, Metro is conducting an intense multi-phase public engagement process to shape a near-term ordinance that will look at eliminating the zone and peak surcharges, as well as a longer-term set of pilot projects and programs that will make fares easier to understand and pay, improve transferring between different agency's services, speed boarding of buses, increase affordability of transit, and improve safety for bus operators.

Public engagement will involve online questionnaires at two points on the planning process, as well as public open houses when there are fare change options for the public to consider and weigh in on. It's also important that this work be informed by harder to reach populations consistent with King County's Equity and Social Justice Strategic Plan.

To this end, Metro is contracting with community-based organizations (CBO's) to engage in a qualitative way with populations unlikely to otherwise engage in Metro's public process. This guide includes a set of questions and topics we'd like to learn more about to inform our work plan.

Metro's role

- Metro staff are available to serve as a resource to conversations with these client populations
- Provide compensation for the staff coordination and administration of outreach activities and reimbursement for direct expenses associates with outreach activities, such as interpretation, food, supplies, or printing of materials

Community-based organization's role

- Determine the best methods for hearing from affected populations
- Facilitate input gathering to collect feedback on the questions and topics provided
- Document and share their process and results with Metro
- Provide an invoice to Metro at the end of the outreach period for compensation

Timeline

- **April** – finalize agreements and feedback scope with participating CBO's
- **May through June** – CBO's conduct engagement activities
- **June** – CBO's submit reports summarizing feedback, invoice for payment

Deliverable

Summary report documenting activities, numbers reached, any demographic information of participants, and feedback received – due by May xxx

Questions

Transit use

1. Do you currently take transit?

If yes, which forms of transit do you take?

- King County Metro Transit Buses
- Sound Transit link light rail (or other services)
- King County Water Taxi
- Metro Access paratransit
- WA State Ferries
- Transit service in other counties (Pierce Transit, Community Transit, Kitsap Transit)

2. How often?

3. Do you drive a car? If yes, why do you drive instead of taking transit?

4. What could King County Metro do to make taking transit a better option for you?

Current fare payment practices

5. How do you pay your fare?

5a. If paying fare with cash, do you have an ORCA card? Yes, No, Don't know

5b. If paying fare with cash, why?

- Don't ride often enough to purchase a pass
- Easier to pay with cash/ticket

- Don't have a debit/credit card
- Don't want to use a debit/credit card for payment
- No convenient locations where I can get or add value to an ORCA card
- Concerned about losing an ORCA card
- Don't want to pay the fee to purchase an ORCA card
- Can't afford the fee to purchase an ORCA card
- Haven't gotten around to getting an ORCA card
- Don't know what an ORCA card is
- Don't know how to get an ORCA card
- Don't know how to load value to an ORCA card
- Don't know how to use an ORCA card
- Don't know that there is an e-purse on the card

5c. In the future, Metro might move away from cash-fare payment. Could this work for you if you...?

- Could get an ORCA card right now?
- Could get an ORCA card and not pay \$5/\$3 fee?
- Had ORCA information translated into the language of your choice
- Could add value using an app on your phone
- Could pay your fare using your phone
- Didn't have to use a card at all
- Could replace the card more easily
- Could be guaranteed that you wouldn't lose any value if you lose your card
- Could keep your travel history anonymous
- Had a lower fare
- Had more convenient bus service
- If your fare could be subsidized
- Could purchase an annual or 3 month pass

5d. If you use an ORCA card, how do you refill or top-up your card?

Barriers to Fare Payment & Reduce Fare Options

6. Do you face any barriers paying your fare?
7. What type of fare do you qualify for?

Today's options:

- Adult
- Youth (Ages 6-18)
- Reduced fare senior (Ages 65+)
- Reduced fare disabled (disability verified by a doctor)
- Low income (200% of federal poverty level or below)

Talking points:

Did you know that transit agencies are required to offer discounts for seniors and people?

If not, tell them:

Metro offers a reduced fare of \$1.00 for people who are ages 65 and older or people who have a disability.

- Are you 65 or older?
- Do you think you would qualify for a discount due to a disability? – do you carry a red/white/blue Medicare card?

Metro is one of the few transit agencies in the country that offers a discounted fare (\$1.50) for people with low or no income. Do you think you would qualify?

If they don't know:

Are you getting basic food or Apple Health benefits?

(If qualified for reduced fare senior, reduced fare disabled, youth, or low/no income)

Awareness of and participation in existing fare discounts/programs

RRFP, ORCA LIFT, youth, Human service ticket program, taxi scrip program

8. Were you aware of these fare discounts or programs before today?

- **If eligible and aware and not participating**, why not?
- **If eligible and participating**, what's working and what are the barriers (for RRFP and youth we would like to know barriers to using the ORCA card for fare payment?)
 - How can we help people become aware and access these discounts and programs?

(if regular Adult fare payer) Fare change preference

If conducting this questionnaire orally, please switch up the order in which you describe each option to avoid order bias.

9. Metro is considering two options for adult fare changes:

Single fare \$2.75 (No zone or peak surcharge; travel any time, any distance for \$2.75)

Please indicate whether you agree or disagree with the following statements:

(answer choices: strongly agree, somewhat agree, neutral, somewhat disagree, strongly disagree)

- This fare option is easy to understand.
- This fare option would make it easier and faster for people to get on the bus.
- This fare option is equitable for riders.
- This fare option is affordable.
- I will ride the bus more because of this fare option.
- I like this option.

Off peak fare of \$2.50. Peak period fare of \$3.00. (No zone surcharge. Keep peak surcharge (same as today) between 6-9 a.m. and 3-6 p.m. to reflect the higher cost of providing service in peak travel times.)

Please indicate whether you agree or disagree with the following statements:

(answer choices: strongly agree, somewhat agree, neutral, somewhat disagree, strongly disagree)

- This fare option is easy to understand.
- This fare option would make it easier and faster for people to get on the bus.
- This fare option is equitable for riders.
- This fare option is affordable.
- I will ride the bus more because of this fare option.
- I like this option.

If they answer "somewhat disagree" or "strongly disagree" to the affordability question or the ridership question, ask:

Metro's goal is to make transit more accessible for everyone. That's why they are exploring the possibility of implementing programs that could mitigate this proposed fare change's impacts on affordability and transit access. We could explore the viability of the following ideas and potentially incorporate that into our longer-term work plan.

10. Of the following options, which two do you think would work the best for you:

- Expand the transfer window to more than two hours
- Provide one free youth fare with the purchase of one adult fare to make ridership more affordable for families
- Create a student fare for anyone enrolled in universities or colleges
- Increase the income threshold to qualify for ORCA LIFT
- Expand outreach about ORCA LIFT to ensure everyone who qualifies will understand they could use the program

11. What else do you think Metro should consider to increase access and affordability?

Comfort with technology

12. Do you have a Smart Phone – yes, no, don't know

13. Do you use your phone to get information about transit? If yes, how (Google maps, OneBusAway etc.)?

14. How comfortable are you with using technology to pay your fare? – scale (1-10)

Demographic information

15. Age

16. Race/ethnicity

17. Primary language spoken at home

18. Annual household income

If people are eligible for certain discounts, but don't know about them. Please make sure they receive information about them and how to get them.

Materials available to handout

- Regional Reduced Fare Permit application

- ORCA LIFT brochure, enrollment locations
- ORCA brochure
- Current fares cheat sheet

World Relief Summary Report

Who We Questioned

We questioned 31 people, covering a variety of languages including: Arabic, Turkish, Pashto, Dari, Russian, Ukrainian, Twi, Urdu, and English. The median age of those we questionnaired was 36, with the youngest being 23 and the oldest 55. A majority of the participants reported being unemployed with no income. The highest annual income recorded was \$2,000. 90% of these participants own a smartphone; of these individuals, 96% use their devices to get informed about public transit. A vast majority use Google Maps and much smaller percentage use OneBusAway. On a scale of 1 to 10 the median comfort level in using their smart phones to pay for transit was a 8.35.

Results

Of the 31 individuals questioned, every one of them utilizes the transit system. Most take the bus almost always or sometimes and do not drive. Those who reported driving instead of taking transit raised concern about the timeliness of the bus system, the safety of the buses, and lack of shelter at bus stops when it is raining. Thirteen individuals said they use an Orca card, sixteen reported using bus tickets given to them by World Relief, and two use cash to pay their bus fare.

Those who do not use an Orca card said they did not know how to get one, found it more convenient to pay with cash/tickets, or do not want to pay the fee to obtain an Orca card. When asked what would make moving away from cash payments work for them, individuals reported that getting an Orca card now, paying using their phones, or avoiding the initial fee would make an Orca card more accessible.

Individuals who do use and Orca card mostly refill it at a bus station.

A majority of the participants did not know about the senior and disabled discounts, but zero of them qualified. However, 60% did know about the low income discounts and 76.67% believed they qualified though 65% reported not participating in these discounts because they do not know how to access them. We asked what would make these discounts more accessible to participants and they voiced that more advertisements, online availability (such as ads, orientations, and Facebook updates), as well as email notifications would be a good way to educate the majority of transit users. They stressed that email is better than a home address because they often move around and change home address, but their emails are constant.

90% of those questioned said they pay the regular fare. When asked about the \$2.75 no zone or peak surcharge fare, 44.44% strongly agreed that it was easy to understand, 25.93% somewhat agreed, and 11.11% strongly disagreed. A majority of participants agreed that it would make the bus more affordable and time efficient while making them more likely to ride the bus. 34.62% reported strongly liking this option, while 7.69% strongly disliked this fare. When questioned about the second fare option, 29.63% strongly agreed that it was easy to understand, 22.22% somewhat agreed, 7.41% somewhat disagreed, and 11.11% strongly disagreed. 33.33% reported strongly liking this fare option and 14.81% strongly disliked this option.

In response to being asked how else Metro can make transit more accessible, expanding the transfer window and creating a student fare were the most popular responses.

At the end of the questionnaire we asked for any other responses to this issue or concerns about the transit system. We got a variety of responses including:

“The change time during the weekend is one hour, it should be less.”

“I am concerned about the safety of my wife and children when we ride the bus. Sometimes there are drunk and violent people.”

“I wish the bus drivers were more informative on discounts.”

“They should use Facebook to inform us about different programs.”

“We need a bus stop closer to Buena Casa Apartments in Kent. We have to walk a long ways to take the bus and there is no shelter.”

“I do not like waiting for buses when it is raining because there is no covering at the bus stop.”

Hopelink Outreach Summary

Overview

King County Metro sought feedback to shape a near-term ordinance that would look at eliminating the zone and peak surcharges, as well as a longer-term set of pilot projects and programs that would make fares easier to understand and pay, improve transferring between different agency's services, speed boarding of buses, increase affordability of transit, and improve safety for bus operators.

King County Metro requested a partnership with Hopelink to administer a short questionnaire and garner feedback from diverse community groups and organizations, taking advantage of Hopelink's network of community organization partners in east and north King County.

Outreach Methodology

Due to the limited timeframe for conducting outreach, the Hopelink Mobility team integrated questionnaire administration into existing outreach efforts as well as easily coordinated outreach sites, including all five Hopelink Centers. The outreach locations and dates are as follows:

Location	Date	City	Type
Rainier Valley Community Center	04.19.17	Seattle	LGBTQ Senior Resource Fair
Auburn Library	04.29.17	Auburn	KCLS Assistive Technology Fair
Hopelink Kirkland	05.01.17	Kirkland	Food Bank/Social Services
Hopelink Redmond	05.02.17	Redmond	Food Bank/Social Services
Hopelink Shoreline	05.03.17 05.16.17	Shoreline	Food Bank/Social Services
Hopelink Sno-Valley	05.04.17	Carnation	Food Bank/Social Services
Issaquah City Hall	05.05.17	Issaquah	<i>Metro with Dave Tour</i>

Hopelink Bellevue	05.10.17	Bellevue	Food Bank/Social Services
	05.16.17		
Miller Community Center	05.10.17	Seattle	LGBTQ Senior Resource Fair
Sno-Valley Senior Center	05.12.17	Carnation	Senior Center

From these locations, we received 107 questionnaire responses as well as garnered feedback from relevant stakeholders throughout the outreach process.

Questionnaire Instrument

The Outreach team administering the questionnaire used the same instrument provided in the King County Metro “Contracted Community-Based Organization Outreach Guide” to ensure consistency with the other community-based organizations conducting outreach. There were several limitations to the questionnaire design which resulted in confusion and disinterest from respondents. We have included lessons learned on the questionnaire instrument throughout this summary in order to strengthen response rate and accuracy in future Metro outreach efforts.

Analysis of Questionnaire Results:

Key Takeaways

- **Awareness gap:** There is a significant awareness gap on the types of fares offered and eligibility criteria.
- **Redeeming eligible fares:** Many expressed disinterest in obtaining an ORCA LIFT or RRF card given the burden of going in person to King Street Center. Greater promotion of ORCA To-Go and the services available will be key in bridging this gap.
- **Outreach to limited English proficient populations:** due to the short timeframe, we decided not to provide interpreters at our outreach events. There were severe language barriers when explaining options to LEP populations. To bridge awareness gaps, promotional materials should be translated in culturally-appropriate languages and interpreters should be on-site at outreach events. There is also an opportunity to look at word choice and tailoring marketing based on cultural differences. There were several individuals who did not understand a word or the word did not translate effectively in their native language. In one

example during outreach in Sno-Valley, individuals were having trouble understanding the term "public transit" but understood the term "bus" instead.

- **High use of cash:** Convenience was a large factor for why many respondents choose cash instead of ORCA card, whether that is due to infrequency of use or barriers to registering.
- **Uncertainty** is a noteworthy factor when selecting fare payment methodology. One stakeholder in Snoqualmie Valley acknowledged the older adults' uncertainty in the remaining balance on an ORCA card. Using cash takes away uncertainty so they always know to bring enough to ride the bus.
- **Adding funds to an ORCA card** was a barrier for several respondents who live day-by-day and do not have the funds to load prior to using the Metro system.
- **Peak versus Non-Peak:** One Hopelink center manager strongly preferred the single fare option (\$2.75). They stated it would be easier to distribute human services bus tickets since there would be a level of certainty that the payment matches the cost.

Breakdown of Questionnaire Results

- **Use of public transit:** 77 people currently take public transit compared to 30 that do not. Bellevue Hopelink had the most people (23 out of 24 individuals) currently using public transit. The Redmond and Carnation/Sno-Valley Hopelink Centers had the least amount of people currently using public transit.
- **Driving a car:** Individuals were more likely to drive a vehicle in Redmond (15 drove vs. 6 individuals who do not drive) and Sno-Valley (8 drivers vs. 2 non-drivers). At all outreach centers, there was this underlying theme that you needed a car to get around the East and North areas of King County. This could be more a re-occurring theme because we were tabling at food banks, where it may be hard for individuals to carry all their items on the bus.

Consistent themes people gave regarding why they drove instead of taking public transit:

- "Time constraints and convenience"
- "Sometimes driving is easier than taking 3 buses and 3 hours for more than 1 doctor appt."

- Many people referenced needing a car for the job or work duties. Many people also mentioned the challenge of taking kids on the bus and how it wasn't really feasible to get to the bus stop, get on the bus, and travel with children on King County Metro buses.
- Other individuals stated that locations were not accessible or buses were not in their neighborhoods. Specifically in Sno-Valley, many people stated there were simply no routes to choose from.
- **What could KC Metro do to make transit a better option for you?** Several themes surfaced regarding what KC Metro could do to make transit a better option for individuals in North and East King County. Frequency of bus routes, location of the routes, and the need for more rural routes were mentioned regularly. There were also several suggestions around lower fares and making transit more affordable.
- **How do you pay your fare?** Our questionnaire results seem to match KC Metro's own results, showing that 1/3 of questionnaire respondents use or prefer cash as their fare payment.
- **Why pay with cash?** Most people who said they paid with cash say they use cash because it is "convenient" and "easier". Unfortunately, people did not elaborate as to why it is easier or convenient. Some people alluded to the fact that it is an extra step to load an ORCA card if you already have the cash. A few people stated that they used cash because "extra trips outside of budget" and "no choice". This may suggest that individuals do not have enough money to put on an ORCA card and are simply getting and using cash whenever they have it.

One person stated that, "there is no advantage to the card, no price break. Just inconvenience". Others said they don't ride regularly enough to make it worthwhile to get an ORCA card. Several respondents did not realize they qualified for a cheaper ORCA card (ORCA LIFT or RRFP). Once they were aware of this, they seemed more likely to look at obtaining an ORCA card.

- **What would encourage you to use payment methods other than cash?** Most people said that they would be encouraged to use a different payment method other than cash if it was more convenient and/or easier for them. Many people said they would use a different payment method if they were offered a discount or if the price was cheaper. A few people seemed confused about the question and were unsure what other options KC Metro meant. The question was worded ambiguously and was a bit vague for people to grasp. Perhaps if other options were listed out, people would have been able to give more specific answers.

- **If you use an ORCA card, how do you refill or top-off your card?** There were many answers ranging from online to light rail stations to grocery stores. There were a few people that referenced the Regional Reduced Fare Permit (RRFP) and how it was difficult to go downtown for older adults. Several people also expressed frustration with various grocery store machines being down or not working; making it more difficult for them to load their ORCA card.
- **Do you face any barriers paying your fare?** This question was extremely confusing for people. Many individuals did not answer this question either because they were unsure what “barrier” meant or because of a language barrier. Those that did answer often put “yes” or “no”, but did not elaborate.

Of the individuals that answered “no” to this question, their answers did not correlate with their other answers. For example, there were several individuals who stated that they could not afford to pay for their fare or desired a cheaper bus ticket, but when it came to the barrier question, they stated they did not have any barriers.

Of the individuals who listed barriers to paying their fare, affordability was at the top of the list. People stated “unemployment”, “no income”, “lack of \$”, and “no job at time”. Several other people acknowledged that they did NOT have a barrier because their school, work, or human service organization subsidized their bus pass.

- **What type of fare do you qualify for?** Again, the wording of this question caused confusion. Many individuals marked more than one option, but had questions regarding what they qualify for versus what is the best option for them. Several people marked options that they were not eligible for. Other people, based on their answers, could have been eligible for a cheaper fare and were not aware of it. One individual (self identified as 75 years of age) marked that he was not eligible for a RRFP (65+) because he was not 65. It looks like he was confused by how the options were laid out for him.

Several Hopelink locations at specific food bank times have been identified as outreach locations for ORCA To-Go and ORCA LIFT. Many people did not seem to know what options they qualified for and what the benefits of these options were. There were also language barriers at each Hopelink location. It would be beneficial to have an interpreter with the identified language during food bank hours to make sure individuals fully understand the options that are available to them.

- **How comfortable are you using technology to pay your fare?** People were confused by this question because they were unsure of what type of technology was available. It would have been helpful and perhaps produced more detailed answers to offer some suggestions people could choose from. Several people even seemed to think that the technology would be paying the fare and they would not have to.

In some instances, respondents had questions about the 1-10 scale. They understood what 1 and 10 meant, but the in-between numbers were more ambiguous.

- **Other observations:**
 - Many individuals did not speak English or were limited English proficiency (LEP). This made it extremely difficult to administer the questionnaire and to obtain useful results. This was also apparent when going through and analyzing the questionnaire results. There were many people who exhibited a language barrier, but then marked “English” on their primary language question. The language barrier also showcased a gap in an individual’s understanding of their options, particularly related to what ORCA card they were eligible for and how it worked.
 - Several individuals did have family members with them that were attempting to translate the questionnaire, but certain language and ideas just did not translate effectively. For future outreach efforts, it is imperative to get materials and questionnaires translated in the language needed for that location.
 - There were also many cultural barriers related to giving personal information. Several individuals did not want to divulge any information (whether personal or not) because of immigration and/or cultural concerns. This also related to their views on obtaining and using an ORCA card. Many expressed concern that they would be tracked and people would know where they were going.
 - Some outreach team members ended up giving the questionnaire verbally to several people because the questions were hard for them to understand as written. Perhaps less complex questions or questions that pinpoint what information is most important to KC Metro. For example, the question of why people opted to use cash instead of an ORCA card or another method did not really get at the heart of why. People simply put “easier” or “more convenient”, but we still don’t know why it is easier or more

convenient to use cash. I talked with a few people who did not seem to understand the benefits of an ORCA card. Once I explained to them how it could be easier, they seemed more open to the idea.

White Center Community Development Association Outreach Summary



White Center Community Development Association

2017 Metro Fares Survey Report

White Center Community Development Association
605 SW 108th St, Seattle, WA 981
www.wccda.org
206-694-1082

Summary

This report presents key findings from the 2017 White Center Community Metro Fares Survey administered by the White Center Community Development Association. The survey asked about transit habits, technology usage, and priorities the topic of fares. A total of 172 adults and youth completed the survey in person in throughout the months of April and May 2017.

Methods

The 2016 Metro Fares Survey was conducted from Saturday April 29th through May 26, 2016. The survey was administered in person for resident who live or work in White Center. Staff from the White Center Community Development Association (WCCDA) and its partner organizations recruited respondents from diverse backgrounds and provided language interpretation when necessary. Outreach strategies were tailored to capture a survey sample that approximates the demographics of the neighborhood. We did outreach at 13 different programs and events. WCCDA program participants were also asked to complete the survey.

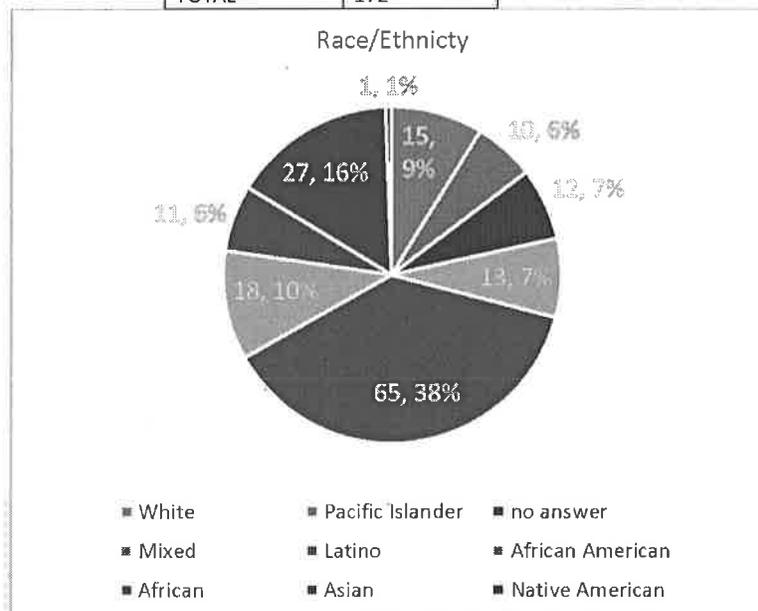
Month	Day	Day of the Week	Location	Languages
April	29	Saturday	White Center Cambodian New Year's Festival	English, Khmer
May	2	Tuesday	CDA Staff Meeting	English
May	3	Wednesday	WCH Coffee Hour	>English, Spanish, Vietnamese, & Somali
			WC Library Tabling	>English, Spanish
			Evergreen High School	>English, Spanish
May	6	Saturday	Renter Canvassing	English, Vietnamese
May	8	Monday	Cascade Middle School Lunch Hours	English

May	10	Wednesday	Greenbridge Tabling Before & After Admin Class	
May	11	Thursday	Evergreen Health Fair Tabling	English, Spanish
May	12	Friday	Seola Gardens Play and Learn 1 Seola Gardens Play and Learn 2	Spanish Somali
May	16	Tuesday	Greenbridge Job Fair	English, Somali, and Vietnamese
May	17	Wednesday	White Center Library Tabling FEEST/Evergreen Greenbridge May Resident Council Meeting	English, Spanish Youth Vietnamese and Khmer
May	18	Thursday	Mt. View Coffee Hours Seola Gardens Foodbank Distribution	English, Spanish, Vietnamese, Somali
May	19	Friday	Greenbridge Play and Learn Bus Stop Canvassing	Vietnamese English
May	22	Monday	Cascade Coffee Hour	English, Spanish, Somali English

Respondent Demographics

A total of 172 people took the surveys: 36 adults completed the Metro Fares Survey, and 136 middle and high school students completed the Metro Fares Survey. Respondent

Race/Ethnicity	Respondent
AFRICAN	11
AFRICAN AMERICAN	18
ASIAN	27
LATINO	65
MIXED	13
NATIVE AMERICAN	1
NO ANSWER	12
PACIFIC ISLANDER	10
WHITE	15
TOTAL	172



Key Findings

Themes and results

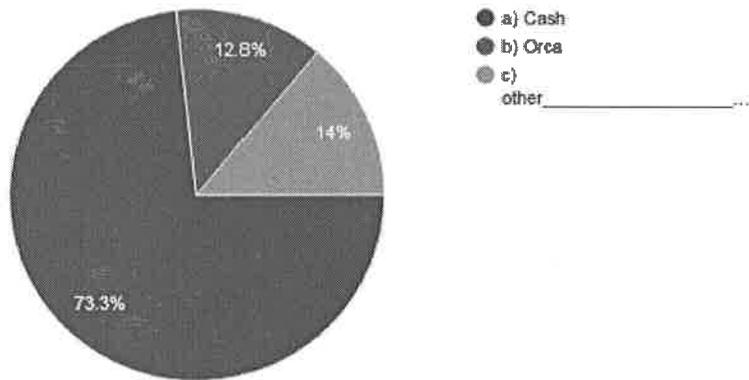
- Adults and youth were asked the open-ended question, What Could King County do to make taking transit a better option? Top themes from adult and youth responses are ranked by prevalence.

Rank	Theme	Selected Quotes
1	Improved Route/Frequency through WC	<p>"Provide a rapid ride, more routes with less stops"</p> <p>"Faster route to downtown"</p> <p>"More & better routes from maple valley to renton and Issaquah"</p> <p>"Better routes-between SW & SE Seattle to South King County"</p> <p>"be more on time # 128"</p> <p>"Express buses during peak times"</p>
2	Fares	<p>"ability to used debit card and more routes"</p> <p>"cheaper no double fares more bus stops in white center"</p> <p>"Make more Orca card reload stations available"</p> <p>"Give more students free bus tickets"</p> <p>"Give us Orca card for free"</p>
3	Sanitation and Safety	<p>"Cleaner, when I did ride the bus it was really dirty, kids scared"</p> <p>"let people know the bus is full on App or bus "</p> <p>"Make it safer, I feel like there's so much drug involving things that happened on the bus"</p> <p>"It doesn't feel safe"</p> <p>"make it more clean"</p> <p>"More/visible security around the bus area"</p>
4	Miscellaneous	<p>"Mass access bus"</p> <p>"Have more accessible bus routes"</p> <p>"More options for if ya have a large bag or something with you. for grocery shopping and such. If the bus is crowd'd it makes it difficult"</p> <p>"provide info in other languages"</p>

Other results

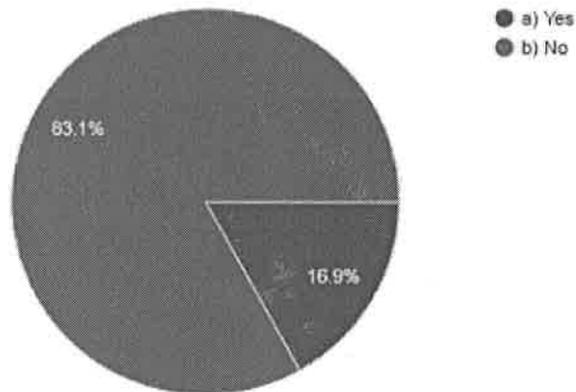
How do you pay for your fare?

172 responses



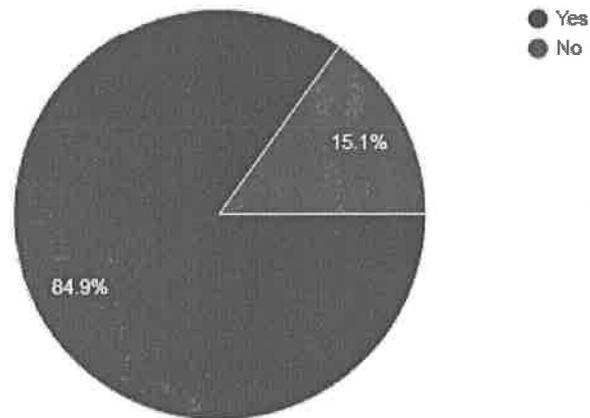
Do you have an Orca card?

172 responses



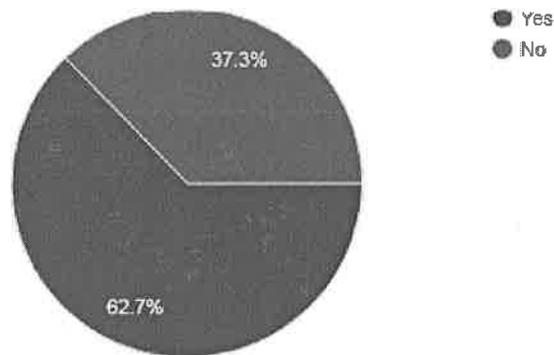
Do you have Smart Phone

172 responses



Do you use your phone to get information about transit?

169 responses



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