



**Massachusetts Bay
Transportation Authority**

MBTA Service & Workplace Return

Steve Poftak

MBTA General Manager

Agenda

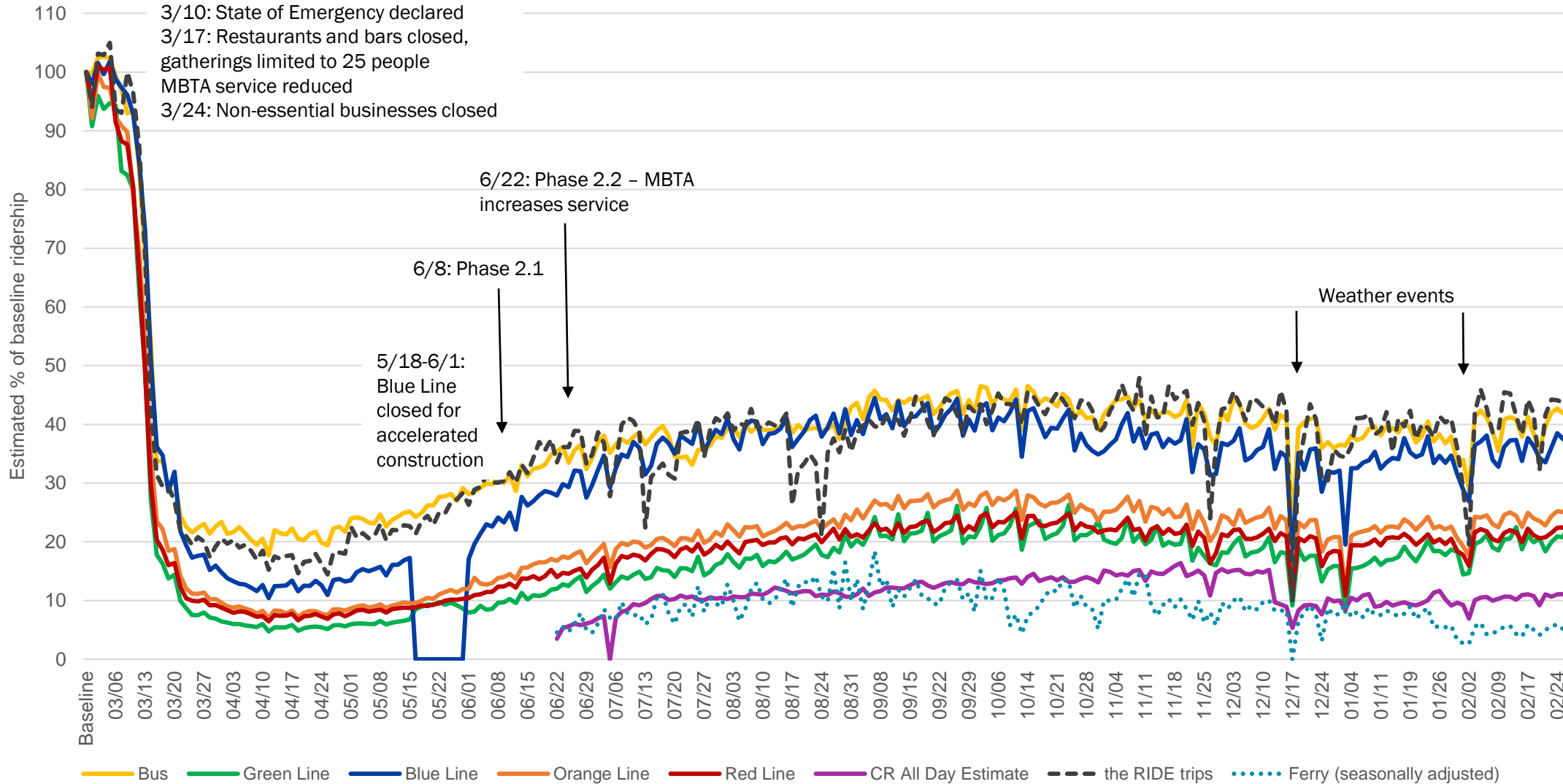
- Ridership
 - Current Ridership
 - Future Ridership
- Budget Impacts
- Forging Ahead: Building to the New Normal
 - Summary
 - Principles
 - Service Plan



Current Ridership



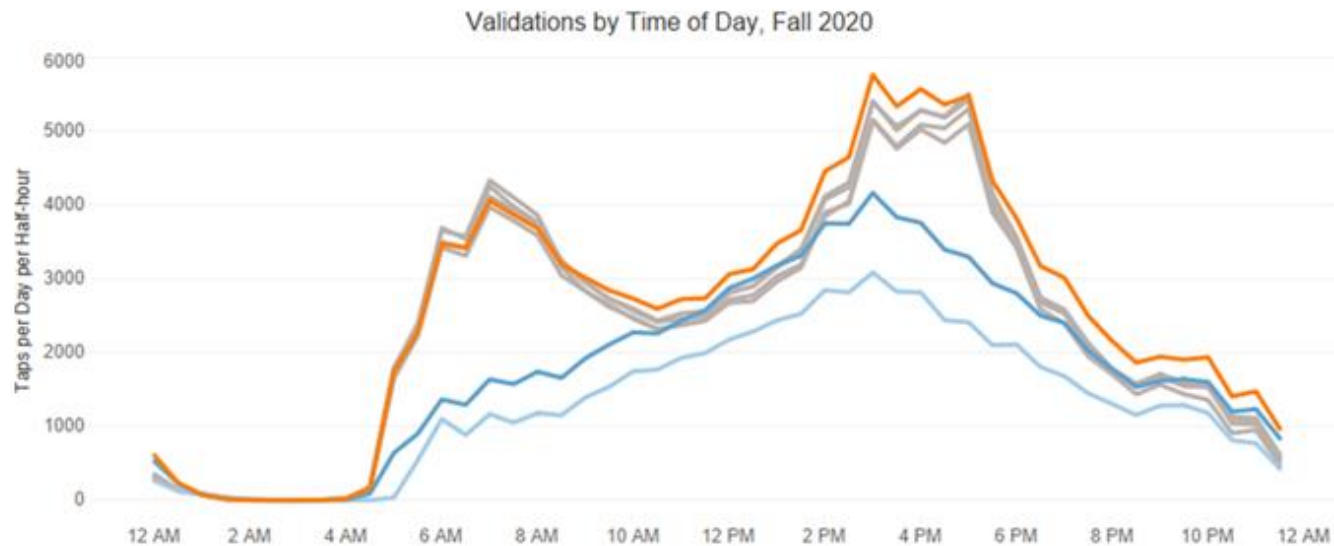
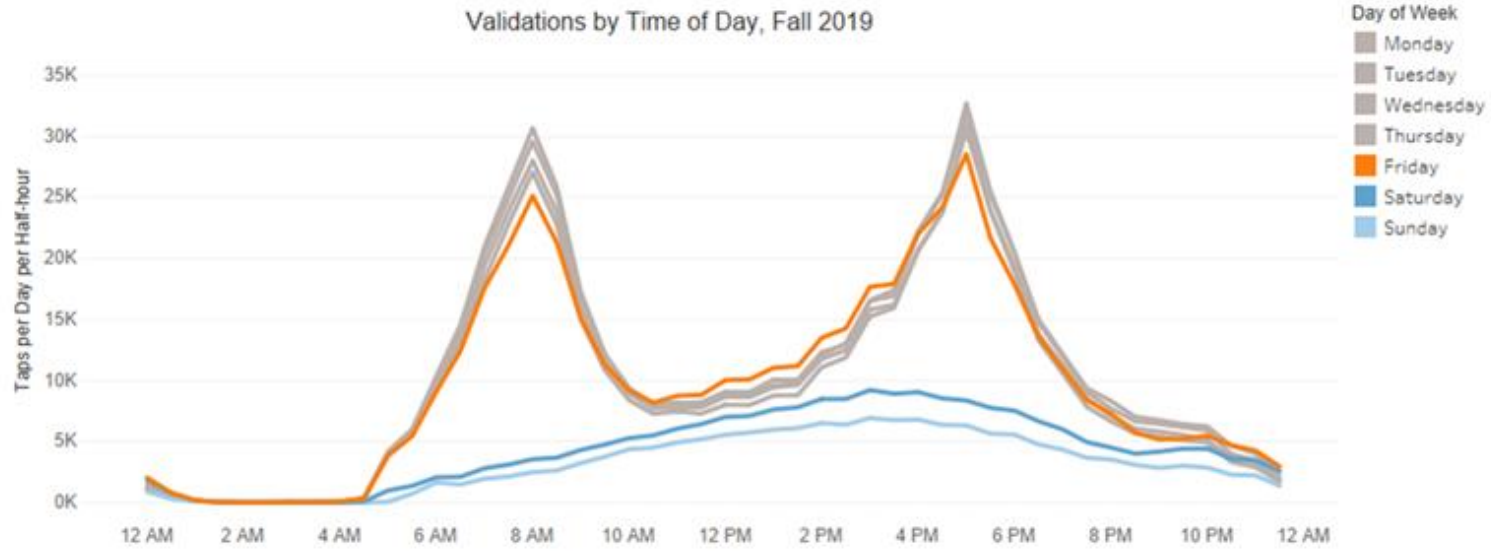
Weekday Ridership by Line and Mode - Indexed to Week of 2/24



- Baseline: Average weekday from 2/24-2/28
- Ferry baseline: Average weekday from the same month in 2019
- Sources: Faregate counts for subway lines, APC for buses, manual counts for Commuter Rail, RIDE/Ferry vendor reports

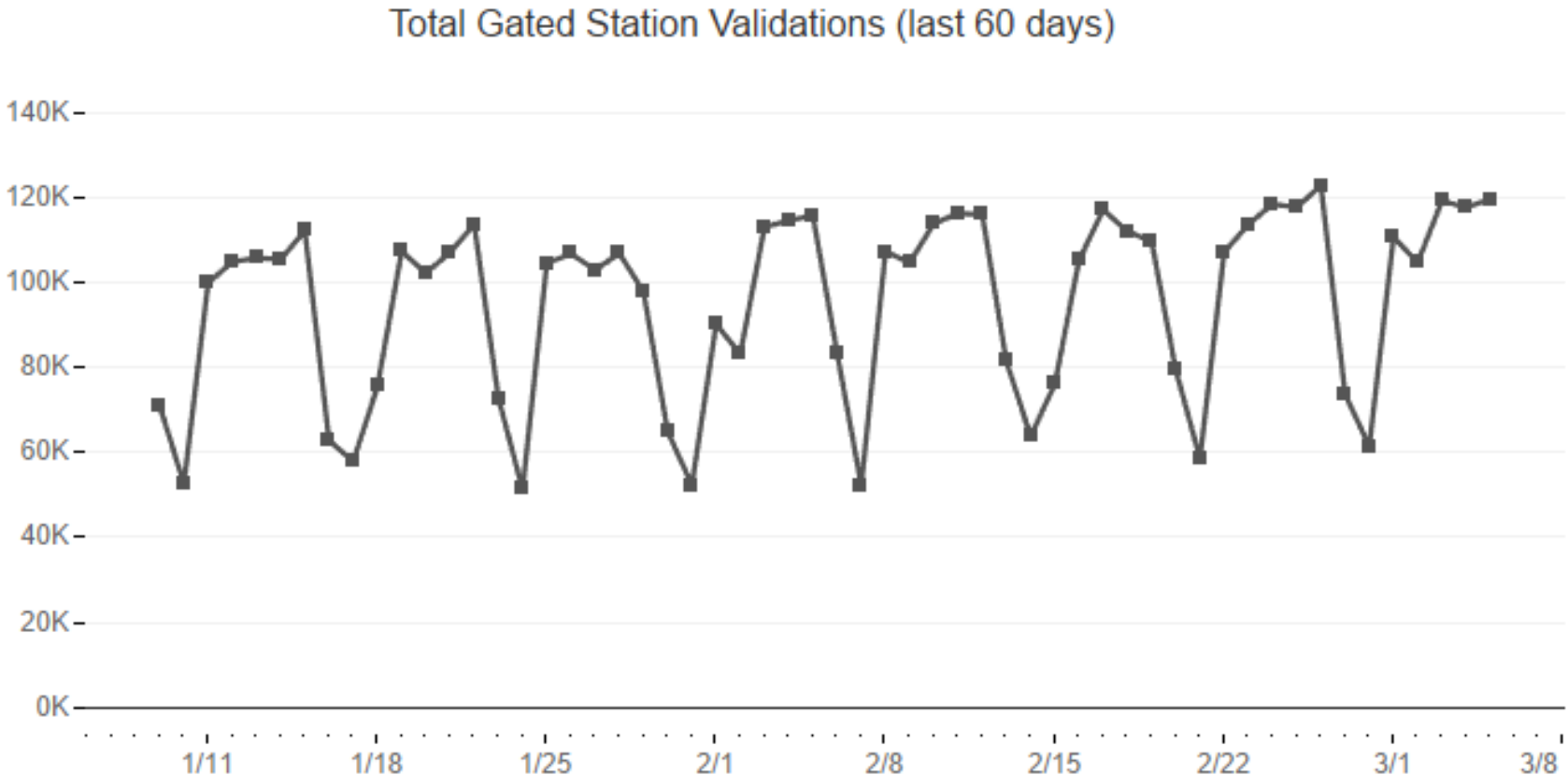


Validations by Time of Day



Gated Rapid Transit Stations

Line	Change in validations: March 2019 weekday average vs. weekday average for Mar 1 – Mar 5, 2021
Blue Line	-62%
Green Line	-80%
Orange Line	-75%
Red Line	-78%
Silver Line	-86%
Total Gated Stations	-76%

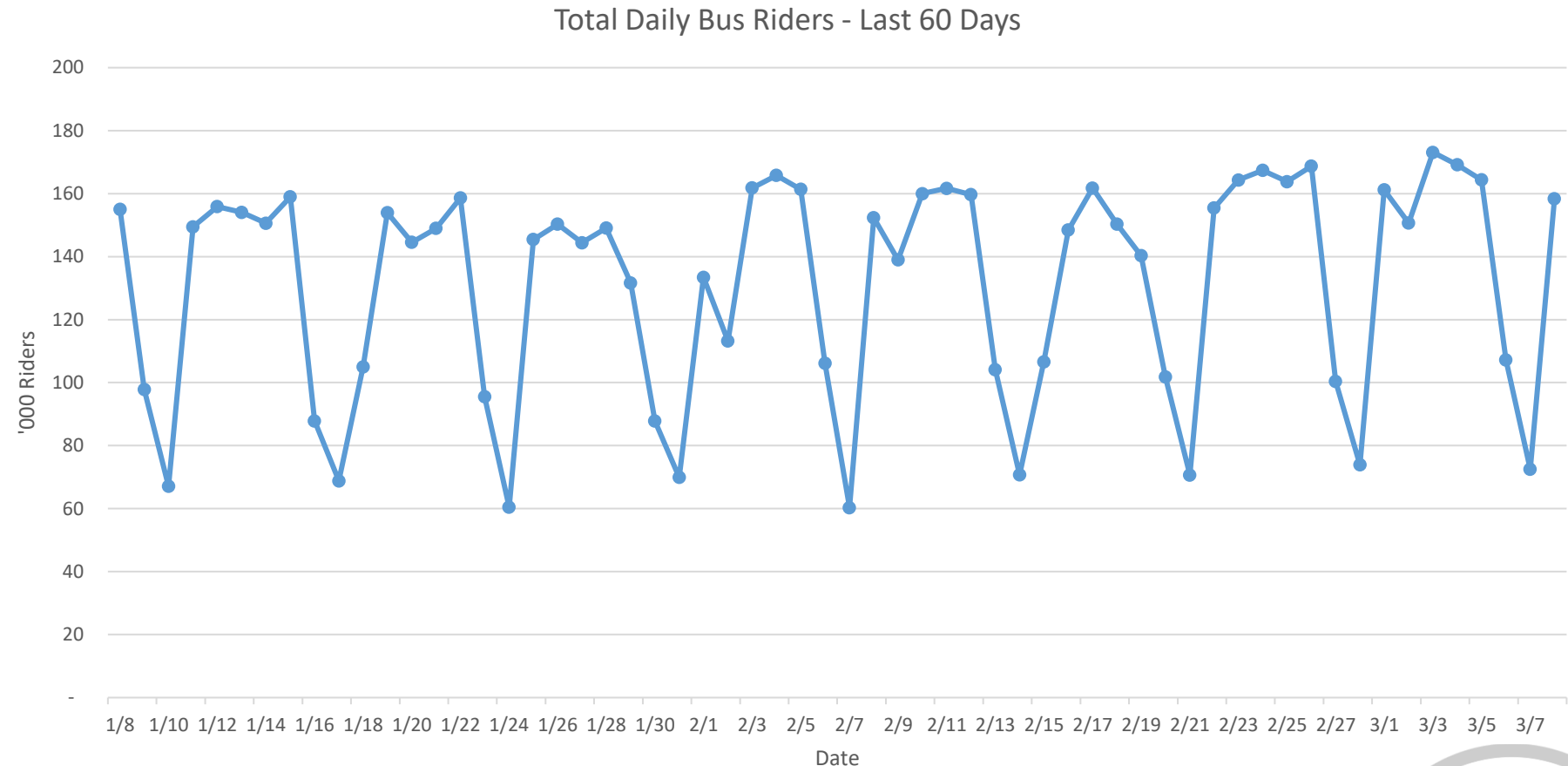


Gated validations data by line and station are available in this [public folder](#) and continue to be updated on the [Data Blog](#). The data is also continuously updated and visualized on the [MassDOT Mobility Dashboard](#).



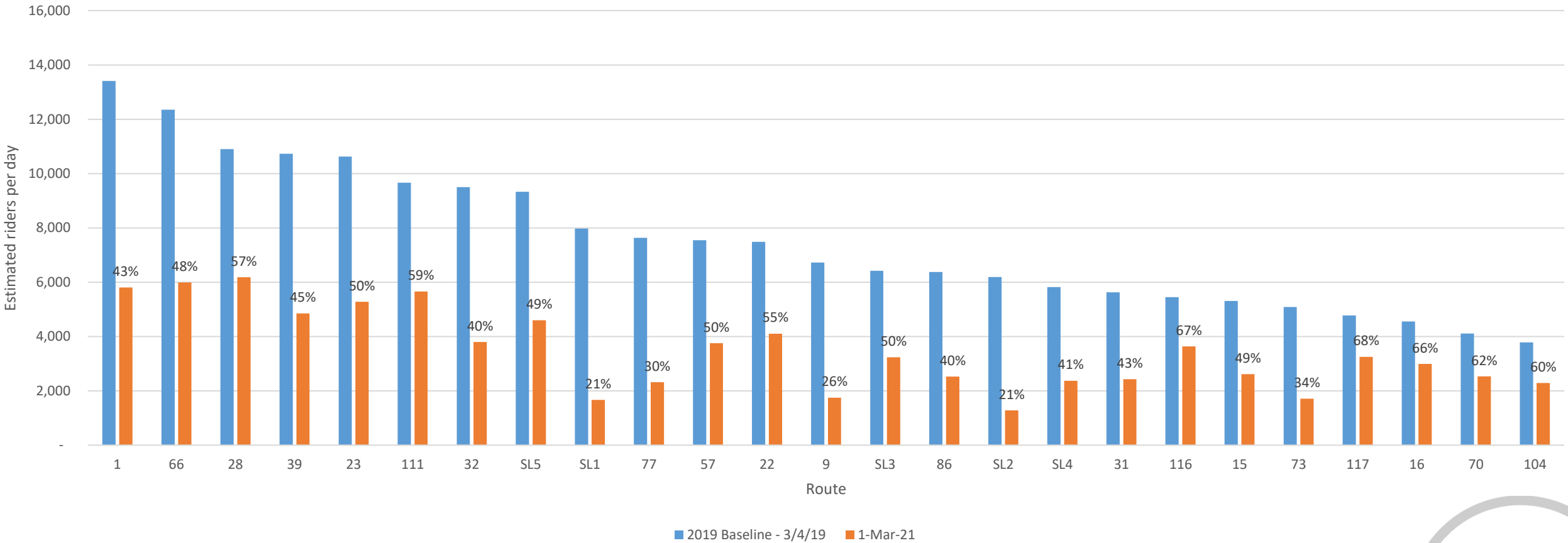
Bus Ridership Trends

- Ridership estimated from APCs.
- Ridership for the most recent days is continuously revised as information on dropped trips is received.
- Route-level ridership has a higher level of uncertainty due to run-as-directed trips that are not in the schedule.



Bus Ridership Top Routes

Daily Bus Ridership YOY, Week of 3/4/19 vs. Week of 3/1/21, Top Routes by Ridership

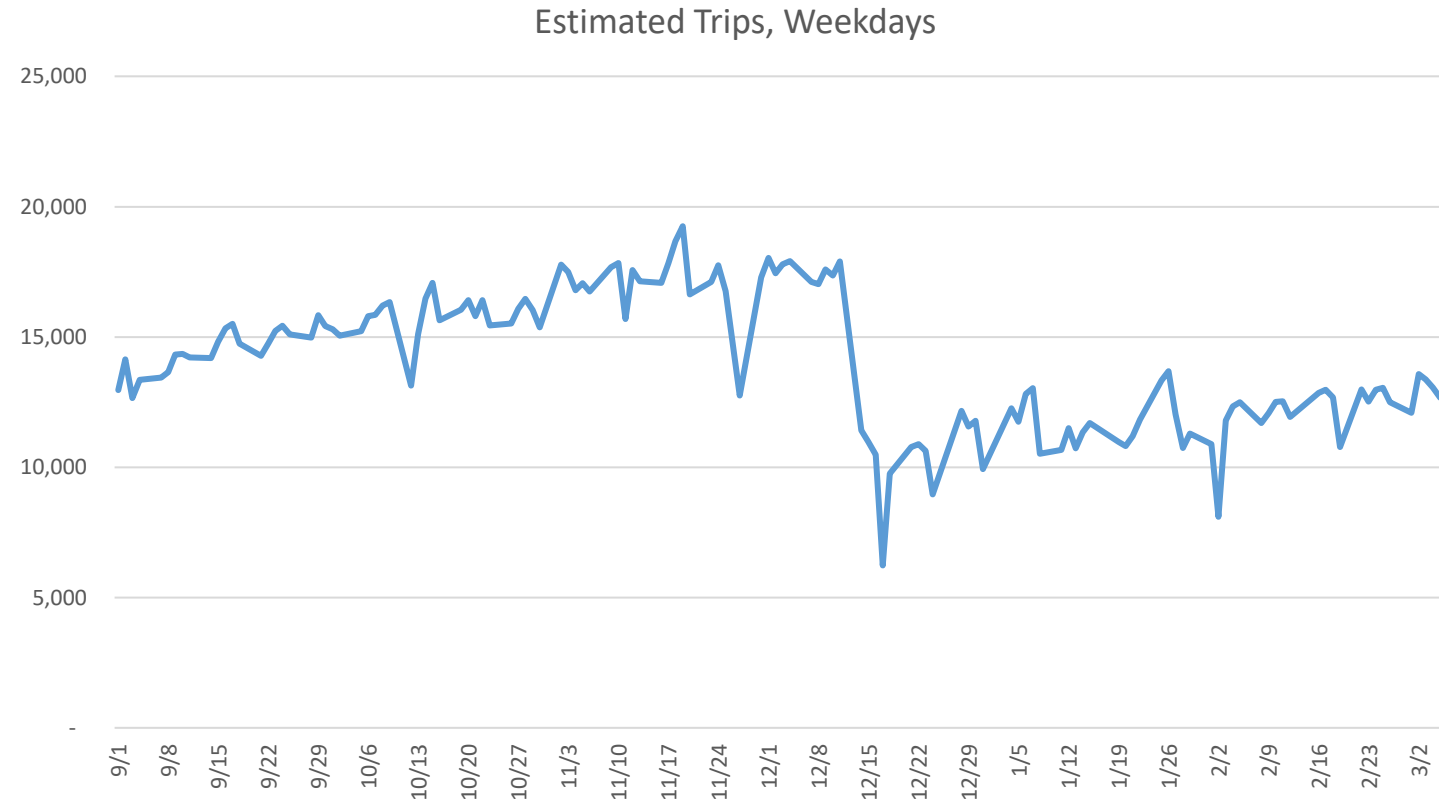


*This chart displays average daily ridership by week, representing the most recent week available. The included routes represent the current top 20 as well as the top 20 routes pre-COVID.



Commuter Rail Ridership (through 3/5)

- Chart **to the right** shows total estimated trips for each weekday since September 2020.
- Chart **below** shows a snapshot of estimated all-day ridership by line, compared with 2018 CTPS counts. The time period is the last 5 non-holiday weekdays (3/1-3/5)
- The current baseline comparison is approx. 118,300 trips, putting the period of 3/1 - 3/5 at 10.9% of pre-pandemic normal.



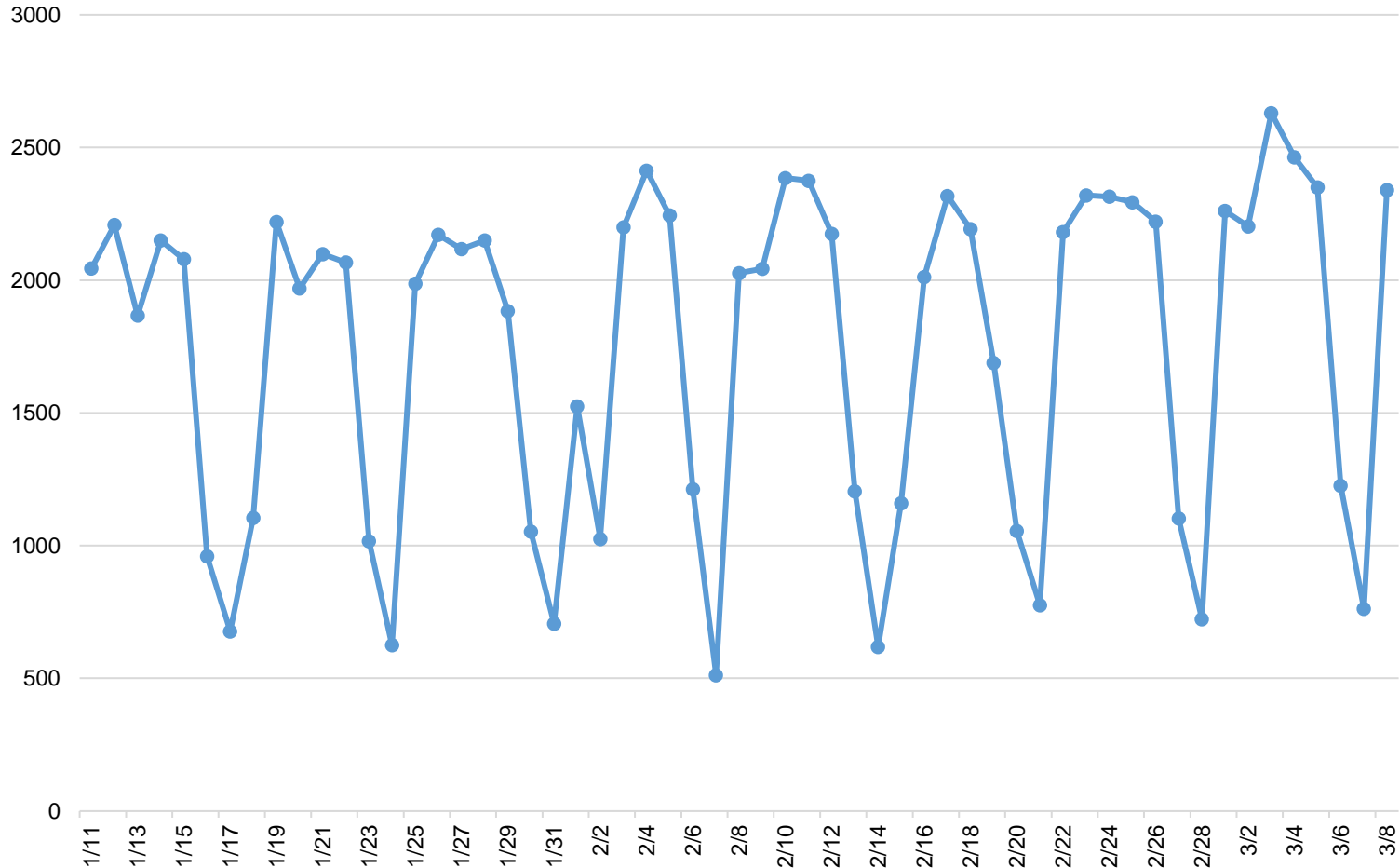
	Estimated Daily Ridership, Weekdays (3/1-3/5/21)	Estimated % of 2018 Weekday CTPS Counts (all day)
Fairmount Line	578	22%
Fitchburg Line	415	4%
Framingham/Worcester Line	1465	8%
Franklin Line	1254	11%
Greenbush Line	358	6%
Haverhill Line	686	10%
Kingston/Plymouth Line	687	11%
Lowell Line	883	8%
Middleborough/Lakeville Line	1139	17%
Needham Line	822	12%
Newburyport/Rockport Line	1653	11%
Providence/Stoughton Line	3015	12%

Ridership totals are aggregated from a combination of on-board conductor counts, counts of trains arriving at terminals, and automated passenger counters on-board trains.



The RIDE

The RIDE Trips per Day



The RIDE reported an average of 2,381 trips per weekday last week. This about 5% higher than the previous week and 55% lower than the baseline (2/24/20 - 2/28/20).

Recent ridership may be revised.



Future Ridership



MBTA Survey Program

- Ridership and travel data is the best way of tracking current travel and determining current trends, but surveys help us understand who is on our system and when departures from the trend may occur
- Survey program goal: Ask employers about the decisions they control (e.g. when employees will be asked to return to work in person) and ask individual travelers about the decisions that they control (e.g. how they travel)
- **MBTA Employer Panel**
 - New bi-monthly survey starting July 2020
 - Reasonable representation of organizations in Boston and Cambridge with a teleworking workforce
 - 4th wave in the field early March 2021
- **MBTA Customer Panel**
 - Monthly survey distributed by e-mail since 2015
 - About 1,000 responses per month, weighted to be representative of pre-pandemic ridership by mode
 - Respondents are mostly frequent riders, and the panel over-represents higher-income riders

MassDOT/MBTA Opinion Panel for Employers



MassDOT and the MBTA have partnered to survey employers throughout the region on their safety and transportation needs during the pandemic. By joining our employer opinion panel survey, you can share feedback that will help us plan system improvements and make important fare policy decisions.

Surveys take approximately 10 minutes, and we plan to send out a new survey every other month.

[Join the MassDOT/MBTA employer panel](#)

For questions or comments, contact us at opmi@mbta.com.

<http://mbta.com/employer-panel>; <https://www.mbta.com/customer-opinion-panel>

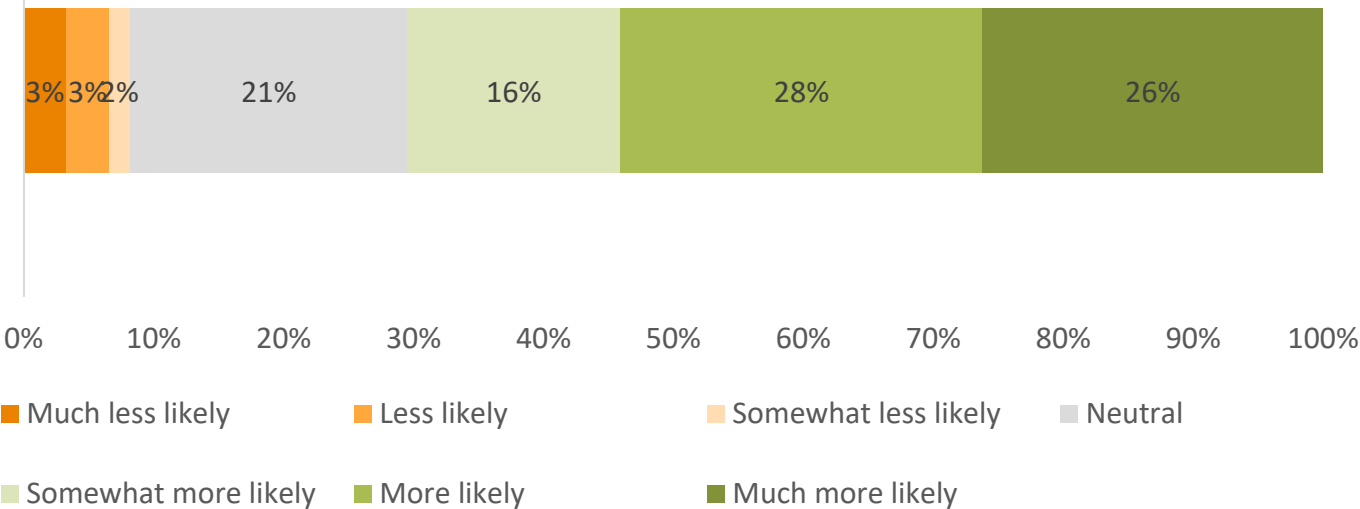


Teleworking in the “New Normal”

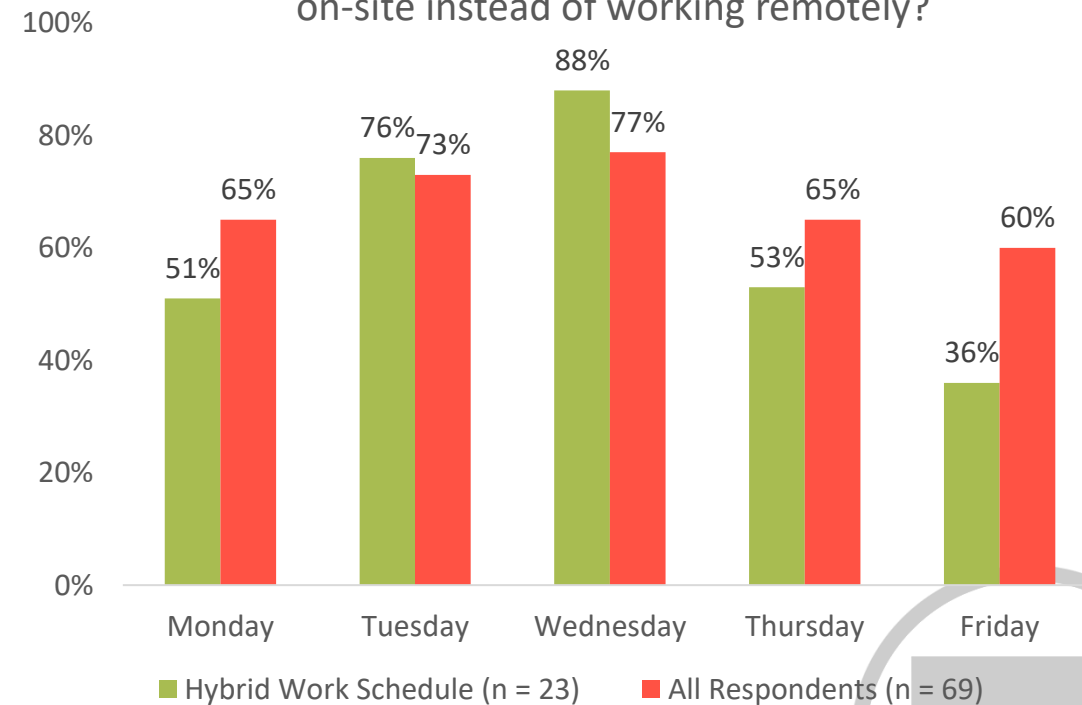
70% of organizations are more likely to allow 1-2 days per week of telework post-pandemic

Individuals expect the combination of employer policy and preference to result in more travel on Tuesday and Wednesdays

Based on your experience with remote work during the pandemic, are you more or less likely to allow primarily in-person employees to work remotely 1-2 days per week after the pandemic?



Which days do you expect to commute to work on-site instead of working remotely?



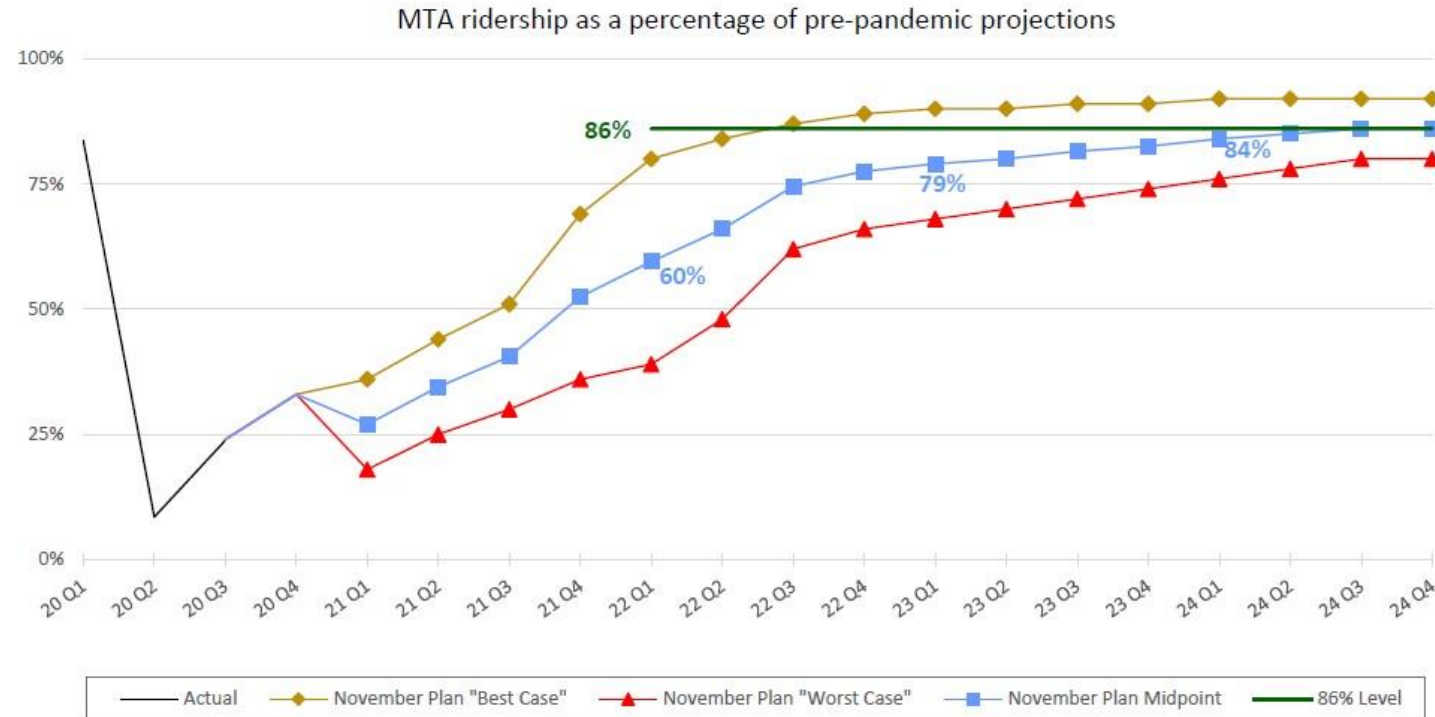
Sources: MassDOT/MBTA Employer Panel September 2020; MBTA Customer Panel, February 2021

Projections Track other Transit Agencies



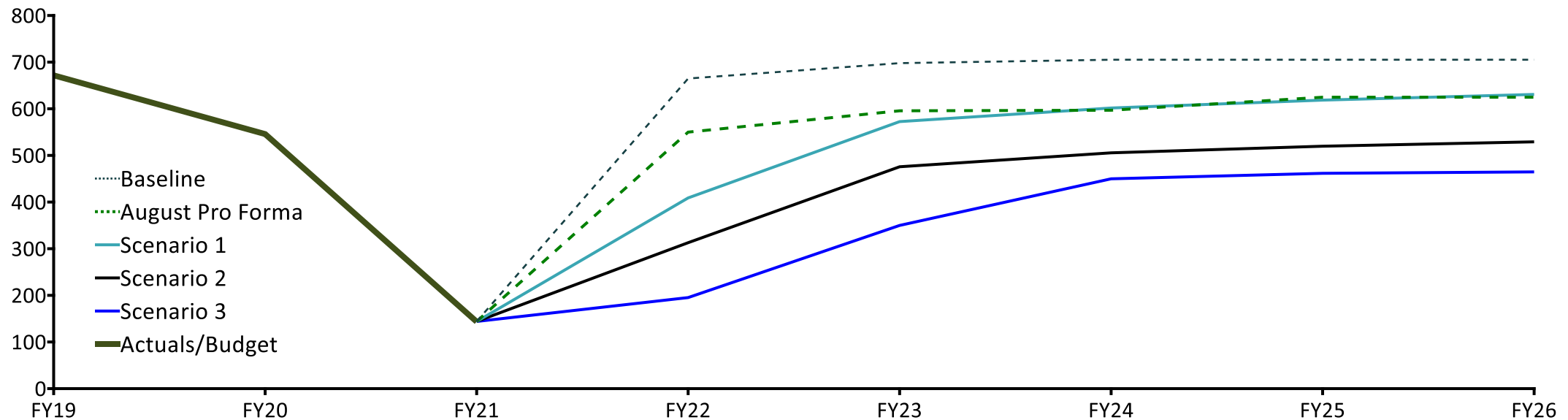
McKinsey projected the “new normal” ridership level between 80% and 92% of pre-pandemic levels by the end of 2024 (86% midpoint)

- McKinsey presented a February Financial Plan for the MTA on February 18, 2021
- Midpoint of their three projections leads to 86% of pre-COVID ridership by the end of 2024



Fare Revenue Scenario Planning Update

- Actual fare revenue has dropped 79% between FY19 and FY21 budget estimates
- Even in the most optimistic scenario, projected fare revenue in FY26 is still below FY19 actuals
- In FY23, fare revenue scenarios estimate a shortfall range of 18%-50% below baseline
- Baseline calculations use FY20 budget estimates and adjust for structural changes the completion of capital projects



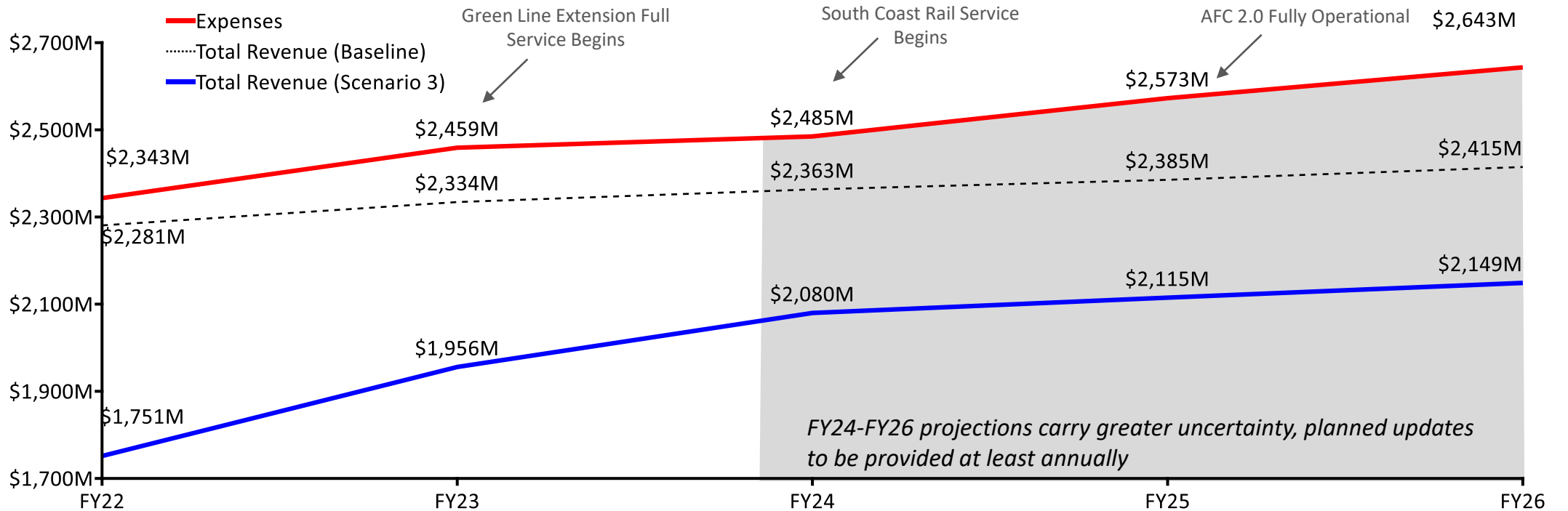
	FY22	FY23	FY24	FY25	FY26
August Pro Forma %	83%	85%	85%	89%	89%
Scenario 1 %	61%	82%	85%	88%	89%
Scenario 2 %	47%	68%	72%	74%	75%
Scenario 3 %	29%	50%	64%	65%	66%

Budget Impacts



FY22-FY26 Budget Gap Outlook – Scenario 3

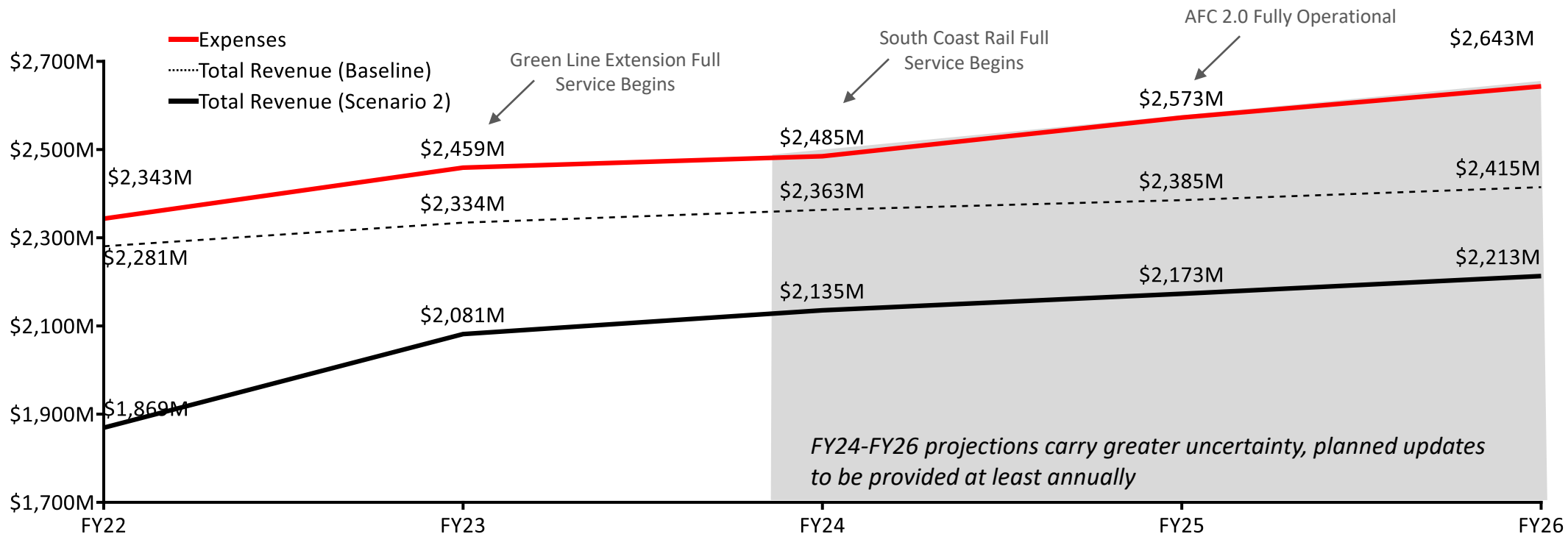
- In the modest scenario, FY23 budget gap cannot be mitigated with current levels of one-time revenues, sequestering savings, and capital funding reallocation



Fare Revenue % of Baseline	29%	50%	64%	65%	66%
Balance Before One-Time Rev.	-\$592M	-\$503M	-\$405M	-\$458M	-\$495M
One-Time Revenues	\$665M	\$80M	-	-	-
Balance Inc. One-Time Rev.	\$73M	-\$423M	-\$405M	-\$458M	-\$495M

FY22-FY26 Budget Gap Outlook – Scenario 2

- In the middle scenario, FY23 budget gap cannot be mitigated with current levels of one-time revenues, sequestering savings, and capital funding reallocation

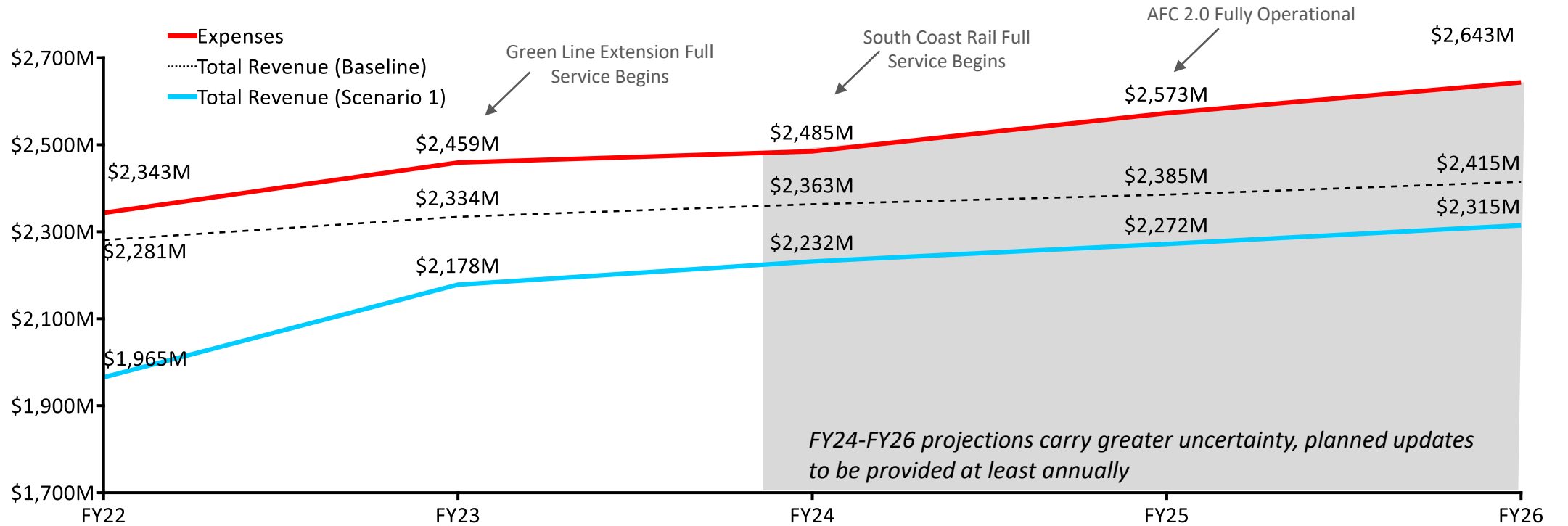


FY24-FY26 projections carry greater uncertainty, planned updates to be provided at least annually

Fare Revenue % of Baseline	47%	68%	72%	74%	75%
Balance Before One-Time Rev.	-\$474M	-\$377M	-\$349M	-\$400M	-\$430M
One-Time Revenues	\$665M	\$80M	-	-	-
Balance Inc. One-Time Rev.	\$191M	-\$297M	-\$349M	-\$400M	-\$430M

FY22-FY26 Budget Gap Outlook – Scenario 1

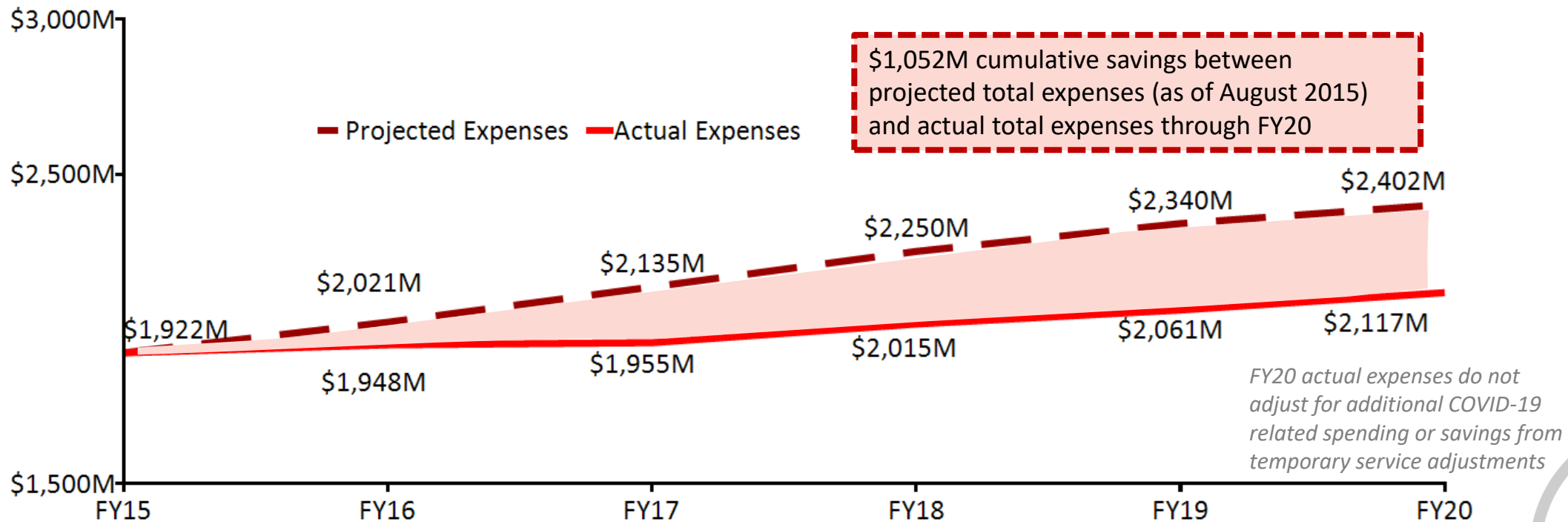
- In the most optimistic scenario, FY22 and FY23 budget gaps can be mitigated with one-time revenues, sequestering savings, and capital funding reallocation



Fare Revenue % of Baseline	61%	82%	85%	88%	89%
Balance Before One-Time Rev.	-\$378M	-\$281M	-\$253M	-\$301M	-\$329M
One-Time Revenues	\$665M	\$80M	-	-	-
Balance Inc. One-Time Rev.	\$287M	-\$201M	-\$253M	-\$301M	-\$329M

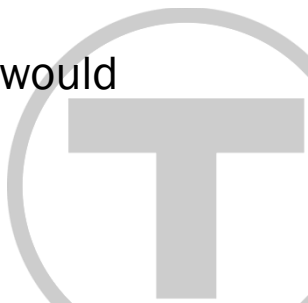
Results of Fiscal Management Since FY15

- Since FY15, with the guidance of the FMCB, \$1,052M in cumulative cost savings
- Actual annual cost growth of 2% since FY15, compared to the 5% projected



Ongoing Efforts and New Opportunities for Long-Term Fiscal Sustainability

- Notable efforts currently underway to improve the future budget outlook
 - Enhancing own-source revenue streams like real estate and advertising
 - Managing the debt profile to minimize year-to-year variability
 - Hedging fuel prices to reduce risks from market fluctuations
 - Renegotiating management consulting /professional service contracts to better align with needs and scope of work
 - Pursuing operational efficiencies across the authority to contain costs through cross-departmental working groups
 - Targeted overtime savings initiative to rein in spending within budget benchmarks
 - Maximizing the allocation of COVID-19 resources to adhere to the latest public health guidance at the best possible rates
- New opportunities that could further mitigate future budget challenges
 - Monitoring additional round of federal relief funding and changes/updates to FEMA reimbursement guidance
- Maintaining fiscal controls and achieving the projected annual 2.4% total expense growth (FY23-FY26) would be below the 3.4% annual growth realized historically prior to COVID-19 (FY09-FY19)



Forging Ahead: Building to the New Normal

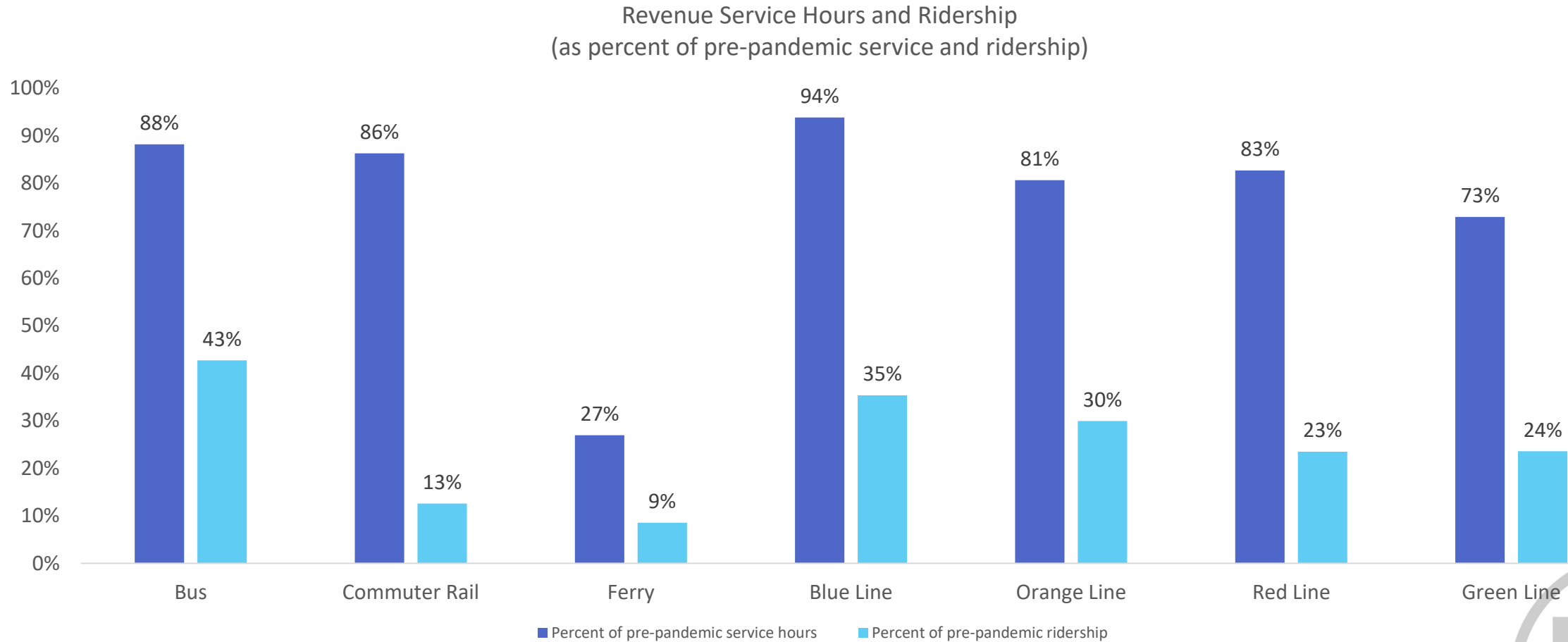


Forging Ahead Summary

- Forging Ahead is the MBTA's process to **prioritize and ensure frequent and reliable service for essential services** (high ridership potential and highly transit critical)
- Forging Ahead 12/14/21 vote was contingent on **environmental review submittal and completion of Title VI Equity Analysis**
 - Environmental Notification Form (ENF) filed with MEPA on 2/1/21
 - Title VI Equity analysis on aggregate Forging Ahead changes has found no disparate impacts or disproportionate burdens
- Even after March & April schedule changes, including the reintroduction of possible service cuts, **MBTA will still operate more than 85% of pre-COVID service system-wide**, far above current ridership (~30% of pre-COVID) and on par with other large transit agencies
 - For the majority of those using essential services, service continue to be very similar to the of Fall 2020
- **The MBTA has started planning for rebuilding service**, but does not expect that ridership will reach pre-COVID levels in FY22
- **Changes made in Forging Ahead are not permanent**, but when we build back, the system will not look the same as it did prior to COVID. The MBTA will try to better serve our communities and riders and will leverage strategic efforts like Bus Network Redesign and Rail Transformation



Spring 2021 Service Retention by Mode



High-Level Plan to Rebuild and Redesign Service

As the MBTA plans to rebuild service, two processes in parallel – (a) short-term focused on transition into COVID abatement and (b) longer-term focused on post-pandemic system

- **(a) Service through end of 2021:** Continue to support essential service through pandemic and begin to transition to post-pandemic (pending COVID abatement)
 - Be there when transit is needed as region re-opens and more people take more trips on transit
 - Continue to manage crowding and support social distancing
 - Begin restoration of access (e.g. routes that serve schools, weekend commuter rail) and frequency
 - Maintain operational flexibility to respond to crowding and demand as feasible
 - Engage with public on initiatives like Bus Network Redesign to consider post-pandemic service and system
- **(b) Redesigning service for CY 2022 and beyond – envisioning a post-pandemic system:**
 - The MBTA will try to build a system that will better serve our communities and riders and will leverage strategic efforts like Bus Network Redesign and Rail Transformation, along with new analysis on ridership and other trends
 - Regional Rail being tested in new Commuter Rail schedules
 - Bus Network Redesign to start extensive public engagement this spring/summer



Key Planning Assumptions for Rest of 2021

Current assumptions for MBTA to plan on for late summer / fall. These assumptions will be reviewed regularly, and will be adjusted to adapt to new data, indicators, trends and ridership

- Ridership will begin to pick up by fall
- Partial return to work expected between September and December (in accordance with range of OTP/MassDOT scenarios)
- Primary & secondary schools and universities re-open for full in-person learning
- Ridership will not meet pre-COVID levels in FY22, especially for downtown-oriented work trips, and time of day trip-making patterns may change
- Continue to support social distancing as consistent with public health guidance

Goal for Fall 2021:

- Continue to **serve and prioritize our existing essential riders with frequent and reliable transit**
- **Make riding transit a good experience for those who start traveling again** (consistent with public health guidance)
 - Research points to transitions in travelers' work/school/home life as ideal times to reinforce transit-riding habits—but also times when people may permanently switch to other modes



High-level Service Plan by Mode Based on Goals

Mode	Summer	Fall
Bus	<ul style="list-style-type: none"> Do not implement remainder of Forging Ahead reductions Restore some frequency, based on ridership and crowding observed in Spring Target 90% of pre-COVID service hours (vs. 88% in Spring) 	<ul style="list-style-type: none"> Restore additional frequency and some routes Target between 90-93% of pre-COVID service hours
Rapid Transit	<ul style="list-style-type: none"> Restore some frequency, based on ridership and crowding observed in Spring Maintain some run-as-directeds to respond to any spot crowding (e.g. return of nighttime or weekend events) 	<ul style="list-style-type: none"> Assess and adjust on Red, Blue, and Orange Line Target opening GLX and Green Line at 85% of pre-COVID service levels (<i>approx. 7 to 9 minutes between trains at peak</i>)
Commuter Rail	<ul style="list-style-type: none"> Continue with Regional Rail model started with April 5 schedules, with modifications as necessary to support ridership 	
Ferry	<ul style="list-style-type: none"> Continue with January schedules, with modifications as necessary to support ridership 	
RIDE	<ul style="list-style-type: none"> Changes as impacted by other modes 	
Continue to preserve operational flexibility to add service as necessary and possible		

Appendix



2021 Update on Peer Transit Agencies

- COVID-19 pandemic and loss of ridership and revenue is an issue across public transit systems
- Transit systems across the country are planning/have discussed personnel and/or service changes to respond to the financial challenges resulting from COVID-19 impacts

New York	MTA facing \$8 billion deficit over next 4 years. Billions in federal relief have helped MTA cover operating costs and avoid massive service cuts, but without additional federal relief, MTA says it would have to reduce service by 40-50% and cut 9,000 jobs starting in FY23.
Washington, D.C.	Even with federal relief funding, Metro is still facing a large budget gap in FY22; without additional federal relief, the agency will close up to 22 Metrorail stations, operate 15-30 minute headways, and reduce Metrobus service to 50% of pre-pandemic levels
Chicago	CTA using federal relief funding to close deficit of \$375 million in 2021 but is facing similar deficits in 2022 that would require across-the-board service reductions without additional federal funding. Even with federal relief, Metra and Pace were forced to cut service by 50% in 2020.
San Francisco	BART and SFMTA using federal relief dollars to reduce crippling operating deficits in 2021. BART still anticipates a \$500 million budget hole by 2023 without more federal aid.
Los Angeles	LA Metro officials are anticipating a shortfall of up to \$1.8 billion over the next two fiscal years due to the pandemic; even after federal relief funding, service was reduced by 20 percent.
Denver	Budget deficits forced the Regional Transportation District to reduce service by 40%; CRRSAA funding enables some supplemental service adjustments in 2021.
Atlanta	MARTA has made service reductions to bus and rail operations to address the dramatic decline in ridership and revenue

<https://www.wsj.com/articles/mta-officials-weigh-whether-to-cut-new-york-city-subway-service-11614605421>

<https://www.nytimes.com/2021/02/18/nyregion/nyc-subway-bus-budget.html>

<https://www.wmata.com/about/news/FY22-buget-public-comment.cfm>

<https://www.rtd-denver.com/news-stop/news/rtd-makes-final-reductions-workforce-week-to-address-financial-impacts-of-pandemic>
<https://www.rtd-denver.com/news-stop/news/funding-new-covid-19-relief-package-rtd-calls-all-bus-and-rail-operators-back-to>

FY21 Net Savings Summary by Mode

Mode	FY21 Savings Expected from Dec 14 Board Meeting	Expected Savings Band +/- 20%
Bus	\$5.1M	\$4.1M - \$6.1M
Rail (Heavy Rail & Light Rail)	\$4.9M	\$3.9M - \$5.9M
Commuter Rail	\$7.9M	\$6.3M - \$9.5M
Ferry	\$3.2M	\$2.6M - \$3.8M
The RIDE*	--	--
Net Savings	\$21.1M	\$16.9M - \$25.3M

*Excludes impact to the RIDE as a result of fixed route services changes. Savings from actions voted on related to the RIDE are expected to have de minimis savings.

- Cost savings are calculated for the time period service changes voted on by the board on Dec 14th are in effect
- All savings are calculated relative to the FY21 budget as approved on October 19, 2020
- Cost savings exclude any potential savings from administrative or other back office departments not directly involved in the provision of service
- Savings include all major expense categories, such as, regular wages, overtime, benefits, fuel, utilities, materials and services
- Cost savings are projections, actual savings may vary and are subject to change based on decisions made by the board and management
- Savings are net of fare revenue impact from service changes



Spring 2021 Subway Service Changes

- Frequency on the Green Line, Orange Line, and Red Line will be reduced by up to 20%.
 - **Red Line** weekday peak goes from every 9 to every 11 mins. on the branches and every 4.7 to 5.5 on trunk. Midday goes from every 14 to 16 on branches and from every 7 to every 8 mins on trunk.
 - **Orange Line** goes from every 7 to every 8 mins. in peaks and every 9 to every 11 mins. in midday.
 - **Green Line** (depending on branch), goes from every 6-8 mins in peaks to every 7-10, and midday goes from every 7-8 to 9-10 mins.
- Frequency on the Blue Line will be reduced by up to 5%.
 - Peaks go from every 5 to every 5.5 mins., and midday goes from every 9.5 to 10 mins. Some parts of the afternoon actually get more service, not less.
- Visit www.MBTA.com/schedules/subway to view subway schedules in late February

Changes will go into effect on March 14th.



Spring 2021 Bus Service Changes

What remains the same:

- **Nearly 80 routes** will continue to operate at or close to pre-COVID service levels
- **More than 20 routes** will continue to operate at higher than pre-COVID service levels, including routes 16, 22, 23, 28, 104, 106, 109, 111, 116 and 117
- Some service hours are being reserved for operational flexibility to respond quickly to ridership returning and/or improve reliability

For additional details, please visit www.MBTA.com/servicechanges.



Spring 2021 Bus Service Changes

Once spring service changes are implemented, the MBTA will be running ~90% of pre-COVID bus service hours

What's changing	Routes affected
Routes with increased frequency	236
Routes with decreased frequency	10, 11, 21, 29, 31, 39, 47, 61, 71, 73, 77, 89, 93, 96, 101, 112, 134, 220, 222, 225, 501, 504
Routes with some increased frequency and decreased frequency throughout the day	1, 16, 32, 57, 70
Suspended routes <i>If your route or stop is affected, please use the MBTA trip planner to plan alternative service.</i>	18, 52, 55, 68, 79, 212, 221, 465, 710

For additional details, please visit www.MBTA.com/servicechanges.

Changes will go into effect on March 14th.



Spring 2021 Bus Service Changes (cont.)

Once spring service changes are implemented, the MBTA will be running ~90% of pre-COVID bus service hours

What's changing	Routes affected
Routes being consolidated <i>If your route or stop is affected, please use the MBTA trip planner to plan alternative service.</i>	24 & 27, 136 & 137, 214 & 216, 217
Routes with changes to hours of service (span)	67, 85, 131
Routes with routing changes <i>If your route or stop is affected, please use the MBTA trip planner to plan alternative service.</i>	211, 435
Routes with trip changes <i>If your route or stop is affected, please use the MBTA trip planner to plan alternative service.</i>	9, 19, 36, 42, 45, 60, 80, 105, 108, 202, 240

For additional details, please visit www.MBTA.com/servicechanges.

Changes will go into effect on March 14th.



Preserving Essential Services

Mode	Highly Transit Critical	Less Transit Critical
High Ridership Potential FY22	Blue Line, Orange Line, Red Line, Green Line (trunk), Mattapan line, many bus routes, Fairmount CR line	Some bus routes
Low Ridership Potential FY22	Some bus routes, some Commuter Rail service, Charlestown ferry*	Hingham/Hull ferry, some bus routes, some Commuter Rail service

- Goal of this framework is to preserve service at or above Service Delivery Policy levels for all services in the High Ridership and High Transit Critical quadrant
- Service Delivery Policy was approved by FMCB in 2017 and quantifies MBTA's target minimum acceptable service level by mode across multiple metrics (incl. hours of operation, frequency, crowding)

*Charlestown Ferry was initially considered as part of essential service, but after further examination, has been moved to low ridership based on further review of Fall 2020 ridership

