2025 Regional Fare Forum

Meeting 2
May 28, 2025

Introductions

- Name & preferred pronouns

- Role

- Transit agency you represent

- What is your favorite thing about summer in the Pacific Northwest?

Meeting Agenda

12:00 – 12:10 pm	Welcome, introductions, agenda review
12:10 – 12:20	Fare forum refresher and recap last meeting
12:20 – 12:30	Summary of fare rates, usage, and where the system is simple and where it is complex
12:30 – 1:20	Passenger personas review
1:20 – 1:30	Break
1:30 – 1:50	Fare simplification options & trade-offs; fare capping overview
1:50 – 2:50	Facilitated discussion on options, trade-offs, and regional priorities
2:50 – 3:00	Next steps
3:00	Adjourn

Regional Fare Forum Purpose

» Set a vision for the next decade for regional fares and ensure the regional system is being managed efficiently and effectively

» Establish priorities for the next phase of ORCA implementation

» Consider recommendations and policy changes to support fare capping, reduced fare program simplification, and expanding ORCA delivery to more aspects of the regional transit system

Regional Fare Forum Desired Outcomes

Clear policy direction and recommendations to drive individual and regional fare policy decision making

Defined priorities to drive future phases of ORCA implementation

Commitment to work with governing board colleagues to examine opportunities and advance policy changes in alignment with regional fare forum recommendations

Role of Fare Forum Members

- Seek regional alignment to arrive at a set of shared policy recommendations

- Consult with your agency's subject matter experts with questions and needs for additional information

- Keep your peer board members and council members apprised of the work occurring at the forum and be ambassadors as changes move forward

What we heard from you

SIMPLIFICATION

- "What's not simple right now?"
- "How reasonable is fare capping?"
- "Can we streamline ORCA products?"
- "We need to make transferring easier and improve connectivity."

EQUITY & ACCESS

- "Is there a perception of fairness?"
- "What is the community saying about fares?"
- "What would fare equity look like?"
- "We need to make transit more accessible and easier."
- "I'd like to see people with disabilities and transit dependent populations have priority access to any fare capping."

POLICY PRIORITIZATION

- "What's the future?"
- "How will we ensure cost containment for ORCA?"
- "If you're a frequent user and need to ride between regions, how do we make this doable?"
- "Can we have a daily maximum for riders who don't have other options?"

Meeting 2 Purpose

- Confirm fare-related challenges related to simplicity for transit riders in the region

- Discuss potential approaches and trade-offs to reduce complexity, including fare capping

- Identify areas of consensus on potential changes and how to balance trade-offs or prioritize outcomes

Shared Policy Values

- **Simple and easy to use for our customers**
  Simple fare structure and media, easier to understand for infrequent customers; easy and safe to use
- **Enhance user experience**
  Improved customer service, real-time account information
- **Better access/availability to all users**
  Greater distribution of fare media, convenient access
- **Seamless travel in the region and interoperability**
  Extend regional integration, seamless regional branding
- **Innovative technology**
  Anticipate new technology, learn from peers, be an international model; need to update/modernize
- **Fiscal responsibility**
  Reduce fare evasion, collect fares to continue to provide service, appropriate distribution of revenue
- **Operational efficiency**
  Better data/analytics, improved security, move away from cash collection
- **Fairness, equity and social justice**
  Eliminate barriers that limit access to transportation, support programs such as low-income fares
- **Safe for passengers and transit employees**
  Pursue fare policy that enhances the safety for the system

Fare Rate Summary and Where There is Simplicity & Complexity Today

Rachel Wilch, KCM

Summary

- **The regional fare system grew over time**, leading to areas of complexity and areas of simplicity.

- **ORCA supports fare payment and revenue collection**, including automatic apportionment.

- **There are more than 30 fares and 46 pass options available in the region**, with
  - Strong alignment across youth and low-income fare categories
  - Growing alignment across adult fare categories
  - Variation among specialized modes
  - Complexity in pass pricing and options

Regional Landscape - Background

Integrated regional fares grew over time to meet the needs of transit agencies and riders. This process led to some areas of simplicity, and other areas of complexity.

+ **One fare system across agencies**

+ **Transfers between services**

+ **Reduced fare programs**

+ **Business programs**

+ **Automatic revenue apportionment**

— **Individual governing bodies**

— **Variable policies and procedures**

— **30 different fares**

— **48 different passes**
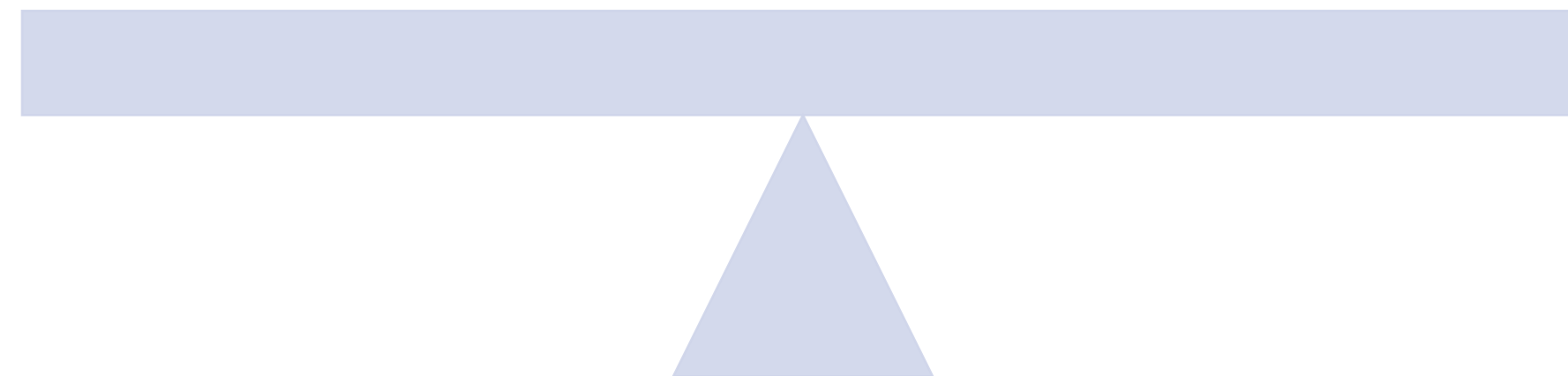
Regional Landscape – Ridership

134M

Boardings in 2024

Passenger types – 83% paid adult fare, 5% paid senior or disabled reduced fare, 5% paid low-income fare, 7% were youth.

Fare products – 33% employer Passport, 38% Purse, 19% Puget Pass, 10% agency specific pass.

Agencies –ORCA is accepted across all eight transit agencies, but ridership and transfer rates vary widely.

Regional Landscape – Fare Revenue

Passport revenue – 51% of regional ORCA revenue comes from employer Passport.

Fare apportionment – ORCA automatically calculates each agency's share of regional fare revenue. Shares vary widely by agency, from $73M for Metro to $500K for Everett Transit.
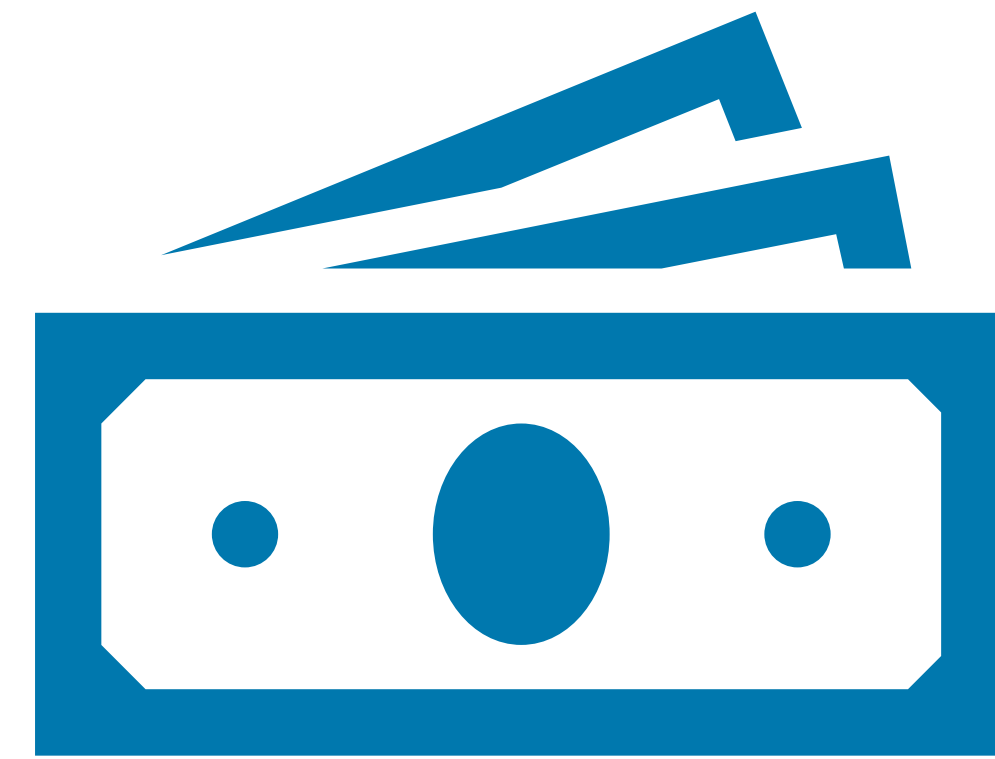
$143M
ORCA Revenue in 2024

Fare Rates by Passenger Category

Youth fare rates by agency

Transit Agency	Youth Fare Rate
Everett Transit	Free
Community Transit	Free
Kitsap Transit: all modes	Free
King County Metro: all modes	Free
Seattle Streetcar	Free
Seattle Monorail	Free for youth 0-5 $2.00 youth 6-18 (or free with use of ORCA Youth Card)
Pierce Transit	Free
Sound Transit: all modes	Free
Washington State Ferries	Free

- There is the most alignment of fare rates in the youth fare category.

- 2 distinct youth fare rates.

- Seattle Monorail is the exception.

- Broader policy questions about whether and how to encourage use of ORCA Youth Card.

Fare Rates by Passenger Category

Low-income adult fare rates by agency

Transit Agency	Low-income Adult Fare Rate
Everett Transit	$1.00
Community Transit	$1.00
Kitsap Transit: Buses	$1.00
Kitsap Transit: Fast Ferry	$1.00 or $6.00 (direction-specific)
King County Metro: all modes	$1.00
Seattle Streetcar	$1.00
Seattle Monorail	$2.00
Pierce Transit	$1.00
Sound Transit: all modes	$1.00
Washington State Ferries	No low-income adult fare rate

- There is also significant alignment on low-income adult fares.

- 3 distinct low-income adult fare rates.

- WSF doesn't have this fare category.

- Westbound Kitsap Transit fast ferries and Monorail are the outliers.

Fare Rates by Passenger Category

Senior/disabled fare rates by agency

Transit Agency	Senior/Disabled Fare Rate
Everett Transit	$0.50
Community Transit	$1.00
Kitsap Transit: Buses	$1.00
Kitsap Transit: Fast Ferry	$1.00 or $6.00 (direction-specific)
King County Metro	$1.00
King County Water Taxi: West Seattle	$2.50
King County Water Taxi: Vashon	$3.00
Seattle Streetcar	$1.00
Seattle Monorail	$2.00
Pierce Transit	$1.00
Sound Transit: all modes	$1.00
Washington State Ferries	$3.10-$5.10 (destination-specific)

- There is partial alignment on senior/disabled fares.

- 10 distinct senior/disabled fare rates.

- WSF rates are destination-specific.

- Westbound Kitsap Transit fast ferries, both King County Water Taxi routes, Everett Transit, and Monorail are the outliers.

Fare Rates by Passenger Category

Adult fare rates by agency

Transit Agency	Adult Fare Rate
Everett Transit	$2.00
Community Transit	$2.50
Kitsap Transit: Buses	$2.00
Kitsap Transit: Fast Ferry	$2.00 or $12.00 (direction-specific)
King County Metro	$3.00
King County Water Taxi: West Seattle	$5.25 (ORCA); $6.00 (cash)
King County Water Taxi: Vashon	$6.00 (ORCA); $7.00 (cash)
Seattle Streetcar	$2.25
Seattle Monorail	$4.00
Pierce Transit	$2.00
Sound Transit: Link & ST Express	$3.00
Sound Transit: T Line	$2.00
Sound Transit: Sounder	$3.25-$5.75 (distance-based)
Washington State Ferries	$6.25-$10.25 (destination-specific)

- There is greatest variation in the adult fare category.

- 29 distinct adult fare rates.

- Sounder, Water Taxi, and WSF account for 21 of these distinct adult fare rates.

- Fare rate change to $3 currently under consideration for Seattle Streetcar.

Pass Options

Passes range in price from $0-$207. They offer a discount for frequent riders, but it can be hard to choose the right option. Pass prices are based on:

- Time- Daily, monthly, or multi-ride passes

- Services - Regional, agency specific, or service/route specific

- Passenger type – Adult, senior or disabled, low-income, youth, or paratransit-eligible

- Fare – The maximum fare amount a given pass will cover

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Pass Options

Passenger Personas

Chris McKnight - ORCA

What is a persona?

ORCO

- A Persona is a composite profile of a group of customers. It acts as a reference point that helps us empathize with and center ORCA's customers.

Complexity vs. affordability

Complexity (y-axis) vs. Affordability (x-axis)

What is a customer journey?

- A customer journey is the complete experience a person has when interacting with ORCA over time.

Awareness
Customers learn about ORCA and how it can help them access and pay for public transit.

Eligibility/ Applying
Customers explore available programs and determine if they qualify for reduced fare programs and complete the application process.

Getting an ORCA card
Customers get an ORCA card through online, digital wallet, in-person, or community-based distribution channels.

Pricing and Products
Customers chose the best fare products for their needs, such as monthly passes or pay-as-you go options.

Customer Support
Customers receive help navigating the ORCA system, resolving issues, and understanding their benefits.

Renewal
Customers update eligibility or benefits as required and continue to use ORCA card services.
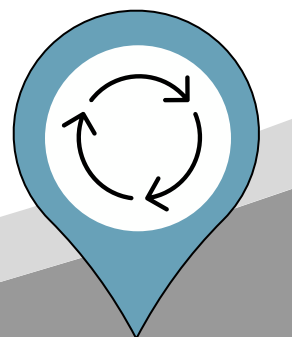
START

Lowest income persona

ORCA

Ibraham's Story

- Recently immigrated from outside the US to the Seattle area.

- Individual income: $0-11,280 per year **and** Enrolled in specific eligible program.

- Transit use: Daily or multiple times per week.

- ORCA Card type: ORCA LIFT with Subsidized Annual Pass loaded.

Program information

- Active subsidized annual pass active users: 13,447

- Represents ~1.5% of ORCA card customers

- Eligibility: 80% of Federal Poverty Level and enrolled in one of six state benefit programs.

Goals

- Access affordable, reliable transit to access essential services, housing support, and employment opportunities.

- Reduce transportation cost burden completely.

- Build stability and routine despite financial insecurity.

Pain Points/Needs

- Needs in-person support from community members, case workers or agency partners.

- Navigating eligibility (including applying to other eligible programs), application, card use and renewal processes.

- Needs language translation support.

- Not all ORCA agencies accept Subsidized Annual Pass.

- Has difficulty maintaining possession of the ORCA card.

Lowest income customer journey

ORCA

How we help our lowest income customers today

- Subsidized Annual Pass customers Ride King County Metro, Sound Transit, Community Transit and Everett Transit at no cost.

- Customers can use their ORCA card to travel across seven transit agencies in Snohomish, King, Pierce and Kitsap counties, with a two-hour transfer window.

- Customers can apply online for free, at customer service locations and at pop-up events in local communities.

How might we reduce complexity for our lowest income customers?

- Simplify eligibility requirements and application process.

- Develop a scalable enrollment process for agencies.

- Empower enrollment partners with more tools, including more translated materials.

- Make support options streamlined and easier to understand.

- Make it easier to replace lost cards and renew expired cards.

- Encourage participation and fare alignment/simplification in the ORCA region.

93%
Very or Somewhat Satisfied with ORCA experience

Improving satisfaction by reducing complexity

Lower income persona

orca

Maria's Story

- Mom of two, works multiple part time jobs.

- Income: $31,296-65,000 per year (less than 200% of Federal poverty)

- Transit use: Daily or multiple times per week

- ORCA Card type: ORCA LIFT card

Program information

- ORCA LIFT active users: 89,420

- Represents ~10% of ORCA card customers

- Eligibility household income level at or below 200% of Federal Poverty Level

Goals

- Access affordable, reliable transit to access jobs, schools, medical and other social services.

- Maintain independence and reduce reliance on personal vehicles or costly alternatives.

- Feel included and empowered within the transit system through equitable access.

Pain Points/Needs

- Affordability of transit significantly impacts overall household budget.

- May have limited or intermittent access to digital tools to apply for and manage ORCA LIFT account.

- Unpredictable schedules require flexible transit options.

- May struggle to pay the up front cost of monthly passes and trip upgrades.

Lower income customer journey

ORCA

How we help our lower income customers today

- Ride most regional ORCA agencies at a reduced cost (Most agencies offer $1 one-way trip, $2 day pass and $36 monthly pass).

- Customers can use their ORCA card to travel across seven transit agencies in Snohomish, King, Pierce and Kitsap counties, with a two-hour transfer window.

- Customers can apply online for free, at customer service locations and at pop-up events in local communities.

How might we reduce complexity for our lower income customers?

- Simplify eligibility requirements and application process.

- Develop a scalable enrollment process for agencies.

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Improving satisfaction by reducing complexity

Senior fare persona

Mei's Story

- Active senior living on a fixed income

- Income: $65,000-85,000 per year

- Transit use: Weekly or monthly

- ORCA Card type: ORCA Senior RRFP card

Program information

- ORCA Senior active users: 69,923

- Represents ~6.5% of ORCA card customers

- Eligibility age 65+ with valid proof of age (driver's license, birth certificate, etc.)

Goals

- Freedom and mobility to stay engaged in the community without needing to drive.

- A transit system that's easy to use and clearly communicates schedules and fares.

- Feel included and empowered within the transit system through equitable access.

Pain Points/Needs

- Challenging navigation at large or crowded stations.

- Digital-first systems that don't always feel intuitive or inclusive.

- May not know all fare rules, like transfer credit, trip upgrades, reload timing and card expiration.

- Limited awareness of tools like text alerts, the myORCA app and accessibility services.

Senior fare persona journey

ORCA

How we help senior customers today

- Ride all regional ORCA agencies and other RRFP participating agencies at a reduced cost

- Customers can use their ORCA card to travel across seven transit agencies in Snohomish, King, Pierce and Kitsap counties, with a two-hour transfer window.

- Customers can apply online for free, at customer service locations and at pop-up events in local communities.

- Customers can add funds instantly at participating retailers or online

How might we reduce complexity for senior customers?

- Continue to expand cash payment options via retail network and vending machines.

- Provide tutorials for myORCA app for easier smartphone use.

- Offer proactive support touchpoints and events as customers continue to use ORCA.

96%
Very or Somewhat Satisfied with ORCA experience

Improving satisfaction by reducing complexity

Disabled fare persona
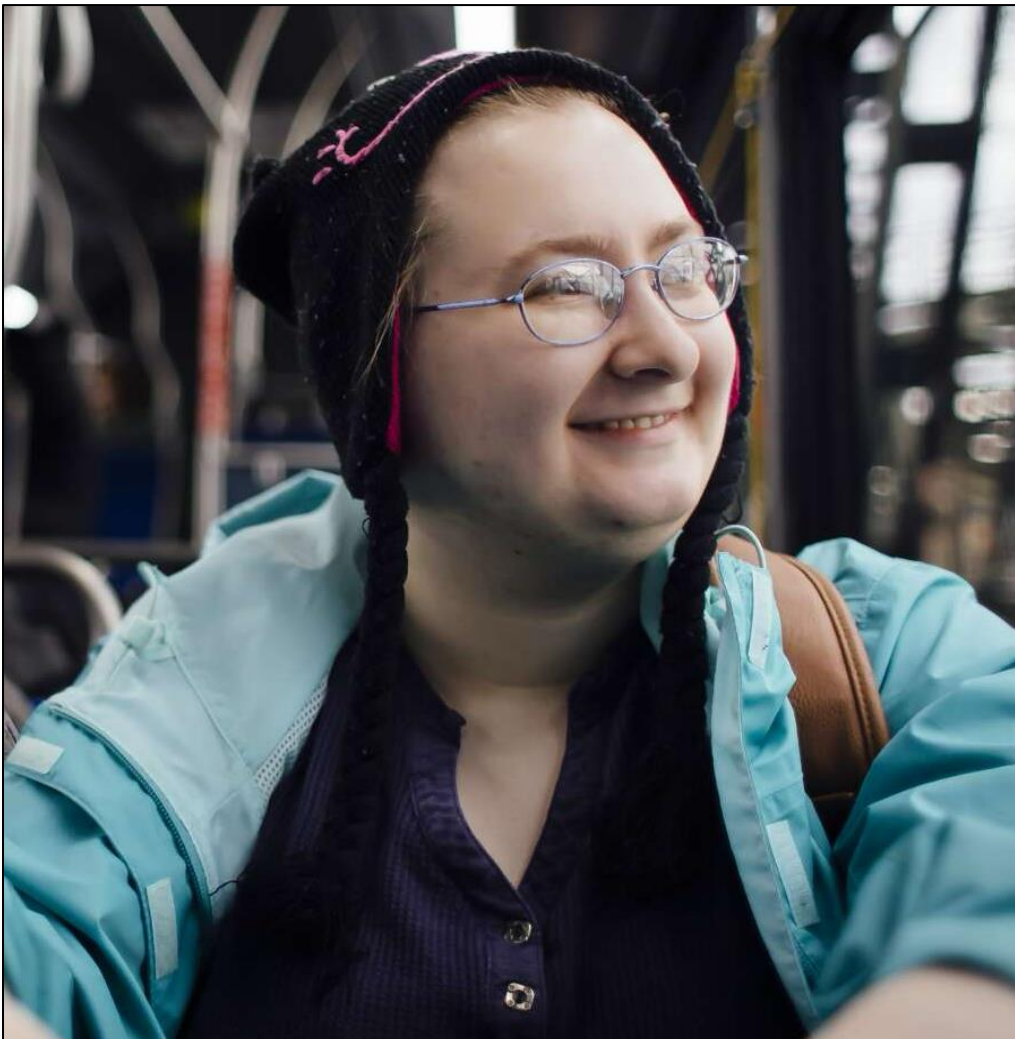
Heather's Story

- Community center employee and math tutor.

- Income: ~ $65,000-85,000 per year

- Transit use: Daily

- ORCA Card type: ORCA Disabled RRFP card

Program information

- ORCA Disabled active users: 15,091

- Represents ~1.4% of ORCA card customers

- Eligibility

Goals

- Freedom and mobility to stay engaged in the community without needing to drive.

- A transit system that's easy to use and clearly communicates schedules and fares.

- Feel included and empowered within the transit system through equitable access.

Pain Points/Needs

- Challenging navigation at large or crowded stations.

- Application and eligibility process is very complex.

- Requires photo on ORCA card.

- Challenges and complexity around Personal Care Assistant, ability to carry and use card form factor.

Disabled fare persona journey

How we help our disabled customers today

- Ride all regional ORCA agencies and other RRFP participating agencies at a reduced cost

- Customers can use their ORCA card to travel across seven transit agencies in Snohomish, King, Pierce and Kitsap counties, with a two-hour transfer window.

- Customers can apply for free online and at customer service locations

- Customers can add funds instantly at participating retailers or online.

How might we reduce complexity for our disabled customers?

- Simplify eligibility requirements and application process.

- Develop partnerships with medical facilities/other relevant agencies/groups to help enrollments.

- Offer proactive support touchpoints as customers continue to use ORCA.

91%
Very or Somewhat Satisfied with ORCA experience

Improving satisfaction by reducing complexity

Adult fare persona

Renee's Story

- Self-employed sales consultant

- Income: $85,000-121,000 per year

- Transit use: Weekly or monthly

- ORCA Card type: Self-funded Adult ORCA card

Program information

- Self-funded Adult ORCA active users: 585,498

- Represents ~ 45% of ORCA card customers

Goals

- Use public transit for trips when driving would be slower, more expensive or less convenient.

- Cost savings for weekend travel or local tourism.

- Wants a reliable, safe and clean transit experience.

- Expects a tech-friendly experience for accessing trip and payment info.

Pain Points/Needs

- Wants more occasional rider-friendly fares, doesn't ride enough to save with a monthly pass.

- Clear service information and alerts for evening and weekend travel.

- Wants more mobile ticketing or contactless payment options that are quick and easy.

Adult fare persona journey

How we help our adult customers today

- Customers can use their ORCA card to travel across seven transit agencies in Snohomish, King, Pierce and Kitsap counties, with a two-hour transfer window.

- Customers can purchase a card online, at customer service locations, at retail locations or receive a card at pop-up events.

- Customers can add funds instantly at participating retailers or online.

- Customers can set a customizable autoload, so they never need to manage funds on the card.

How might we reduce complexity for our adult customers?

- Make it easier/more accessible to replace lost cards.

- Simplify fare structures for seamless rides and transfers.

- Add more digital wallet and contactless payment options.

91%
Very or Somewhat Satisfied with ORCA experience

Improving satisfaction by reducing complexity

Adult fare employer paid persona

ORCA

	Marcus' Story • Senior software developer at a large employer. • Income: $122,000+ per year • Transit use: Two to three times per week • ORCA Card type: Employer-paid ORCA card

Program information	**Goals**	**Pain Points/Needs**
• Employer-funded Adult ORCA active users: 320,412 • Represents ~ 30% of ORCA card customers	• Seeks a reliable daily commute without the hassle of traffic and parking. • Uses public transportation to reduce carbon footprint and support sustainability. • Needs easy access to in person meetings, site visits, and after work activities without driving.	• Less service on weekends and evenings means transit is not as convenient for other uses besides commuting. • Can lose access to free commuting benefits when changing jobs. • Not sure who manages their card or where to go for questions or a replacement.

Employer paid persona journey

ORCA

How we help our employee customers today

- Customers have their transit fares fully or partially covered.

- Customers can use their ORCA card to travel across seven transit agencies in Snohomish, King, Pierce and Kitsap counties, with a two-hour transfer window.

How might we reduce complexity for our employee customers?

- Add more phone wallet and contactless payment options.

- Offer more educational and support tools for employees.

- Make it easier for employees to "take their card with them" when they leave a company.

92%
Very or Somewhat Satisfied with ORCA experience

Improving satisfaction by reducing complexity

Business user persona

Keith's Story

- HR benefits program manager.

- Income: $121,000+ per year

- Transit use: Two to three times per week

- ORCA Card type: Employer-funded Adult ORCA card

Program information

- 684 Area Passport Customers

- 89 Per-trip Passport Customers

- $100 Million+ paid in annual fare revenue per year (60% of ORCA revenue).

Goals

- Offer attractive benefits for employee satisfaction and recruitment.

- Make managing the company's ORCA cards easy to manage.

- Track and report usage and easily conduct individual and bulk card administrative actions.

- Easily renew and manage ORCA contract.

Pain Points/Needs

- Manual processes for tracking card inventory and distribution.

- Occasional billing and usage report reconciliation issues.

- Lack of detailed understanding of how ORCA works for employees and changes taking place in the ORCA system.

- Employee questions and requests take up a lot of time.

Business persona journey

ORCA

How we help our business customers today

- Passport and Choice options to fit a variety of business needs

- Transportation tax deductions and compliance with traffic mitigation ordinances

- Offer a competitive regional commuter benefit to employees

How might we reduce complexity for our business customers?

- Add digital card replacement options

- Improve myORCA account management reporting experience

- Provide digital card provisioning for employees

92%
Very or Somewhat Satisfied with ORCA experience

Improving satisfaction by reducing complexity

18 and Under persona

Jasmine's Story

- 16-Year-Old High School Student

- Transit use: three to four times per week

- ORCA Card type: ORCA Free Youth Transit Pass

Program information

- ORCA Youth active users: 36,180

- Represents ~ 3% of ORCA card customers

- Eligibility

Goals

- Use transit for free with easy-to-use digital tools.

- Onboarding to and feeling comfortable with using the transit system.

- Feel safe and aware of transit safety resources, like emergency call buttons, good lighting, and presence of security staff.

- Have trusted touchpoints for information like schools, family members and community organizations.

Pain Points/Needs

- Card confusion – doesn't always know where or how to get a new card if it's lost or expires.

- Limited access to help – doesn't always know who to ask when something goes wrong with her card or the bus doesn't show.

- Not fully aware of her options – like how far her ORCA card works or if she can transfer between modes.

18 and Under persona journey

ORCA

How we help our youth customers today

- Free fares on participating agencies

- Easy online application process

- First ORCA card is free

How might we reduce complexity for our youth customers?

- Add more phone wallet and contactless payment options.

- Work with more schools to get more Youth cards in-hand

- Provide more communication and education on how tapping ORCA Youth supports frequent, reliable, clean and safe transit for Youth.

94%
Very or Somewhat Satisfied with ORCA experience

Improving satisfaction by reducing complexity

Complexity vs. affordability

Complexity

Affordability

Lowest income

Lower income

Disabled RRFP

Senior RRFP

HR Benefits Manager

Self-funded Adult

Youth

Employer-funded Adult
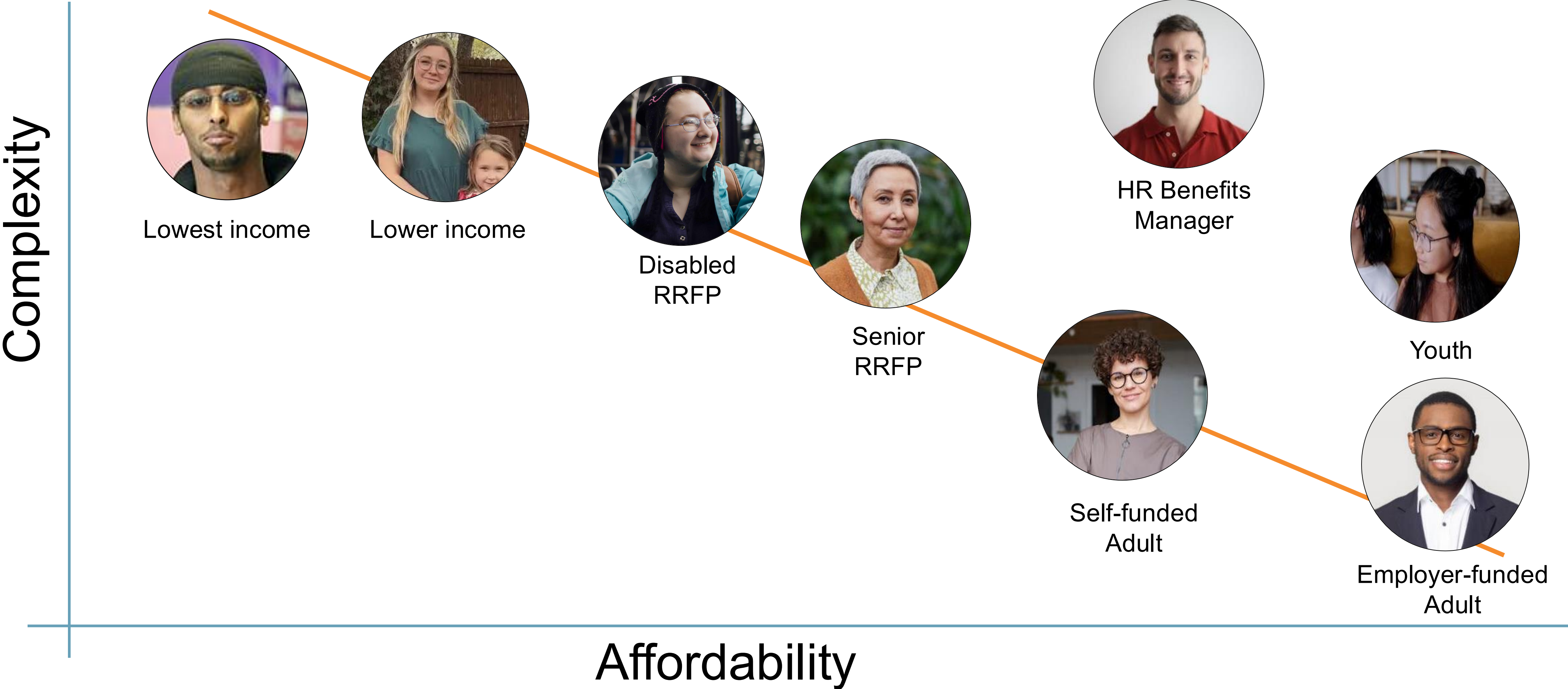
Complexity in the customer journey

	Awareness	Eligibility/ Applying	Getting an ORCA card	Pricing and Products	Affordability	User Support	Renewal
Lowest/Lower Income	High	High	High	Medium/High	Medium	Medium/High	High
Disabled RRFP	Medium	High	High	Low/Medium	Low/Medium	Medium/High	Low-High
Senior RRFP	Medium	Low/Medium	Low/Medium	Low/Medium	Low/Medium	Medium/High	Low
Self-Funded Adult	Low	N/A	Low/Medium	Low/Medium	Low	Low	N/A
Employer-Funded Adult	Low	N/A	Low	Low	Low	Low/Medium	N/A
Youth 6-18	Medium	Medium	Medium	N/A	Low	Low	Low
HR Benefits Manager	Medium	Low/Medium	Medium	Medium	Low	Medium	Medium

Fare Simplification Options & Trade-offs

Alex Krieg, ST

Fare Simplification Options

Low-impact changes

- Adopting a values statement

- Aligning calendar dates for fare change implementation

- Simplifying pass pricing

- Adjusting the transfer window

Medium-impact changes

- Implementing fare tiers Simplifying pass pricing

- Aligning the cadence of fare changes across the region

High-impact changes

- Mandatory alignment and coordinated fare changes

- Fare capping

Fare Capping Overview

What is fare capping?

- A transit fare policy where passengers pay a maximum amount within a specific period – typically a day, week, or month – and subsequent rides are free.

How OMNY Weekly Fare Capping Works

Regular $2.75 Rides

Free Rides!

Monday

Sunday

OMNY customers will be automatically upgraded to unlimited rides each weekly period

After 12 full-fare rides each Monday-Sunday, all rides are free

Fare Capping Overview

What problems can fare capping solve?

- Eliminates the up-front cost of a pass for frequent riders.

- Provides flexibility for riders who have varying travel needs from week to week and month to month.

- Reduces the complexity of choosing from many passes and products.

- Ensures that riders will get the best value per trip for their money.

Fare Capping Overview

Fare capping in the US: Portland/Vancouver

- Three agencies participate in the Hop Card fare payment system that provides daily and monthly fare capping.

- Adult fares:

  » *2.5-hour transfer window, 5 different fare levels with 4 daily fare caps and 4 monthly fare caps*

  » *Transfers from lower value fare to higher value fare involves an upcharge*

  » *Similar logic for fare caps: reaching the lower fare cap means that value is applied to the higher value cap*

- Reduced fares:

  » *2.5-hour transfer window, 5 different fare levels with 3 daily fare caps and 3 monthly fare caps*

  » *Transfer and fare cap upgrades similar to adult fares*

Fare Capping Overview

Fare capping in the US: San Diego Metropolitan Transit System (MTS)

- Three adult fare rates: $2.50 for Local, $5.00 for Rapid Express/Premium, and $8.00 for Rural.

- Fare capping available from their ORCA-equivalent card or app.

- Local fares are capped at $6/day or $72/month. Local service caps do not apply to Rapid Express/Premium.

- Rapid Express/Premium fares are capped at $12/day and $100/month.

- Fare capping does not apply to Rural services or service provided by North County Transit District.

- Similar fare capping policies for reduced fares.

Fare Capping Overview

Fare capping in the US: Dallas Area Rapid Transit (DART)

- DART has a $3.00 adult fare rate for Local service and a $6.00 adult fare for Regional service.

- Payment with a GoPass card provides a 3-hour transfer window (sold as a 3-hour pass).

- There are no transfer credits from Local to Regional services and so a $3.00 Local 3-hour pass is not credited toward fare payment on Regional service (but a $6.00 Regional 3-hour pass does pay fare on Local service).

- Fare capping is available through the GoPass app *for Local service only* with a $6 daily cap and a $126 monthly cap.

- Similar fare capping policies for reduced fares.

Fare Capping Overview

What would the region need to resolve to implement fare capping?

- Design considerations

- Business considerations

- Rider experience considerations

- Clear guidance on certain foundational features

Fare Capping Overview

Design considerations

- What accounts and payment methods are included?

- What agencies will participate?

- What fare rates and trips would count toward a fare cap?

- What timeframe (e.g., daily, weekly, monthly) should be used for fare capping?

- How will transfers apply to capping calculations?

Fare Capping Overview

Business considerations

- What will the revenue impact be?

- What will the cash flow impact be?

- How will this impact customer service needs?

- What are the implications for business accounts?

Fare Capping Overview

Business considerations

- Illustrative example assuming a daily cap for $6 for adult fares and $2 for reduced fares.

- Impact specific to Sound Transit's long-range finance plan.

- Highest passenger benefit and lowest revenue impact for low-income adult and senior/disabled fare category.

- % of passenger benefit refers to the proportion of passengers likely to realize fare savings from fare capping.

	Low-income adult & senior/disabled fare accounts only	All accounts except Business Passport	All accounts
Participating agencies	ST (all modes), KCM bus, CT, PT, ET, KT bus, Seattle Streetcar	ST (Link, T Link, STX), KCM bus, CT, PT, ET, KT bus, Seattle Streetcar	ST (Link, T Link, STX), KCM bus, CT, PT, ET, KT bus, Seattle Streetcar
Agencies not participating	Water Taxi, Kitsap Fast Ferry, Monorail, WSF	Sounder, Water Taxi, Kitsap Fast Ferry, Monorail, WSF	Sounder, Water Taxi, Fast Ferry, Monorail, Streetcar, WSF
ST annual financial impact	**$** < 1%	**$$** ~1%	**$$$** ~3%
% passenger benefit	**13%** ORCA LIFT/Senior Only	**2%**	**3%**

Fare Capping Overview

Rider experience considerations

- High potential for increasing fare complexity with fare capping

- What is the cap period?

- How do riders know what counts and how do they track cap credit?

- Does a cap count across different payment methods or just ORCA?

- Do riders need to supplement their capped trips with e-Purse?

- What if a rider uses an excluded service and ends up with a negative balance?

Fare Capping Overview

Likely fare capping preconditions

- Greater alignment of fare rates to a single price for most modes:

  » *Bus, streetcar, light rail, flexible/micro-transit*

  » *Clearly delineated premium services (Sounder, monorail, ferries)*

- Most/all agencies participating

- Supporting additional resources for customer education and support

- Understanding ORCA and vendor capacity to deliver

- Focusing on affordability challenges and starting with reduced fare capping may be an initial or pilot phase

Fare Simplification Options

Low-impact changes

- Adopting a values statement

- Aligning calendar dates for fare change implementation

- Simplifying pass pricing

- Adjusting the transfer window

Medium-impact changes

- Implementing fare tiers Simplifying pass pricing

- Aligning the cadence of fare changes across the region

High-impact changes

- Mandatory alignment and coordinated fare changes

- Fare capping

Fare Simplification Trade-offs

- **Simplicity**

  How much does a potential change simplify fares and for whom?

- **Ridership impacts**

  How large are the ridership benefits associated with a potential change?

- **Technical risk**

  How technically complex, demanding or risky is a potential change? Would other efforts be delayed if a potential change was prioritized or pursued?

- **Revenue impacts**

  How much would a potential change cost to deliver? How would it impact fare revenue?

- **Agency autonomy**

  How much control would an individual agency have to give up over fare rates and structures, the timing and amount of fare changes, and long-term alignment with other agencies?

- **Other considerations**

  These could include equity, impacts to long-term financial planning, and differential impacts to individual agencies.

Fare Simplification Options & Trade-offs

Adopting a fare simplicity values statement

The region's transit agencies could adopt a non-binding joint statement supporting and committing to pursuit of greater fare simplicity.

Simplicity *how much does this improve it?*	Ridership *how is ridership impacted?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
No/low impact	No/low impact	No/low impact	No/low impact	No/low impact	

Fare Simplification Options & Trade-offs

Aligning calendar dates for fare change implementation

The region's transit agencies could align on implementing fare changes on the same calendar date in any given year.

Simplicity *how much does this improve it?*	Ridership *how is ridership impacted?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
Some impact	No/low impact	No/low impact	No/low impact	Some impact	Increases consistency and simplifies communication to passengers

Fare Simplification Options & Trade-offs

Simplifying pass pricing
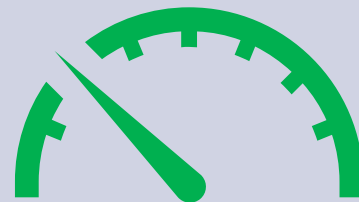
Reducing the overall number of Puget Pass price options would make decision-making less complex for riders.

Simplicity *how much does this improve it?*	Ridership *how is ridership impacted?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
Some impact	No/low impact	No/low impact	No/low impact	It depends	Agencies with specific pass prices & Sound Transit would be more impacted

Fare Simplification Options & Trade-offs

Adjusting the transfer window

Lengthening the ORCA transfer window beyond the current 2-hour window after initial payment may achieve similar fare capping benefits with less technical complexity.

Simplicity *how much does this improve it?*	Ridership *how is ridership impacted?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
Some impact	No/low impact	No/low impact	No/low impact	Some impact	Would require all agencies to update policies around transfer durations

Fare Simplification Options & Trade-offs

Implementing fare tiers

Further fare rate alignment could be achieved through fare tiers with different potential configurations related to agency preference and/or modes.

Simplicity *how much does this improve it?*	Ridership *how is ridership impacted?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
High impact	It depends	No/low impact	It depends	High impact	Ridership and revenue impacts may be positive or negative depending on the changes at specific agencies.

Fare Simplification Options & Trade-offs
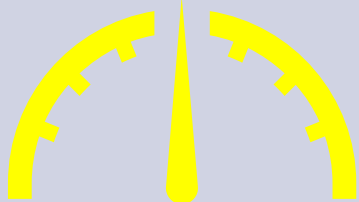
Aligning the cadence of fare rate changes

The region's transit agencies could align on financial planning assumptions related to fare changes and commit to limiting fare rate changes to a regionally-aligned cadence.

Simplicity *how much does this improve it?*	Ridership *how is ridership impacted?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
Some impact	No/low impact	No/low impact	It depends	High impact	Revenue impacts would depend on the cadence and potential differential impact by agency of that choice.

Fare Simplification Options & Trade-offs

Mandatory alignment of fare rates and coordination of fare rate changes

Requirement for all regional transit agencies to align on common fare rates (or fare tiers) and cadence for when fare rates would change.

Simplicity *how much does this improve it?*	Ridership *how is ridership impacted?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
High impact	It depends	No/low impact	It depends	High impact	Ridership and revenue impacts may be positive or negative depending on the changes at specific agencies.

Fare Simplification Options & Trade-offs

Fare capping

There are several approaches for pursuing a regional fare capping approach and this assumes regional fare capping on all services and for all fare categories.

Simplicity *how much does this improve it?*	Ridership *how is ridership impacted?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
It depends	It depends	High impact	It depends	High impact	Design of specific fare capping proposals would drive simplicity, ridership, and revenue impacts.

Fare Simplification Options & Trade-offs

Summary

	Simplicity *how much does this improve it?*	Ridership *how much does this increase it?*	Technical risk *how high are costs and risks?*	Revenue *how is fare revenue impacted?*	Agency autonomy *how much is required?*	Other considerations
Values Statement	No/low impact	No/low impact	No/low impact	No/low impact	No/low impact	
Align fare change implementation dates	Some impact	No/low impact	No/low impact	No/low impact	Some impact	
Simplify pass pricing	Some impact	No/low impact	No/low impact	No/low impact	It depends	Agencies with specific pass prices & Sound Transit would be more impacted
Adjust transfer window	Some impact	No/low impact	No/low impact	No/low impact	Some impact	Would require all agencies to update policies around transfer durations
Implement fare tiers	High impact	It depends	No/low impact	It depends	High impact	Ridership and revenue impacts may be positive or negative depending on the changes at specific agencies.
Align fare change cadence	Some impact	No/low impact	No/low impact	It depends	High impact	Revenue impacts would depend on the cadence and potential differential impact by agency of that choice.
Mandatory alignment of fare rates and coordinated changes	High impact	It depends	No/low impact	It depends	High impact	Ridership and revenue impacts may be positive or negative depending on the changes at specific agencies.
Fare capping	It depends	It depends	High impact	It depends	High impact	Design of specific fare capping proposals would drive simplicity, ridership, and revenue impacts.

Low Intensity (Values Statement, Align fare change implementation dates, Simplify pass pricing, Adjust transfer window)
Medium Intensity (Implement fare tiers, Align fare change cadence)
Higher Intensity (Mandatory alignment of fare rates and coordinated changes, Fare capping)

Q & A

Discussion

Shared Policy Values

- **Simple and easy to use for our customers**
  Simple fare structure and media, easier to understand for infrequent customers; easy and safe to use
- **Enhance user experience**
  Improved customer service, real-time account information
- **Better access/availability to all users**
  Greater distribution of fare media, convenient access
- **Seamless travel in the region and interoperability**
  Extend regional integration, seamless regional branding
- **Innovative technology**
  Anticipate new technology, learn from peers, be an international model; need to update/modernize
- **Fiscal responsibility**
  Reduce fare evasion, collect fares to continue to provide service, appropriate distribution of revenue
- **Operational efficiency**
  Better data/analytics, improved security, move away from cash collection
- **Fairness, equity and social justice**
  Eliminate barriers that limit access to transportation, support programs such as low-income fares
- **Safe for passengers and transit employees**
  Pursue fare policy that enhances the safety for the system

Discussion

What is your biggest hope/best case outcome and biggest fear/worst case outcome of a regional move towards fare simplification?

Proposed Upcoming Meetings

☑ Today!

Weds, June 25
12:30pm-2:30pm

To be determined and we are assuming one additional meeting for both these topics
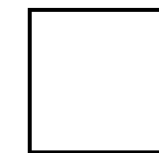
SIMPLIFICATION

Focus on opportunities to advance fare simplification, consideration for aligned fare structures, and benefits and trade-offs of regional fare capping

EQUITY

Focus on reduced fare programs, opportunities to continue alignment regionally, and opportunities to simplify and streamline administration

POLICY PRIORITIZATION

Focus on defining shared regional policy priorities that inform staff and ORCA joint board for future phases of ORCA implementation

CONCLUSION

Focus on reviewing final recommendations and future actions needed by individual agencies

Next Steps

- Meeting minutes, slides, and link to recording will be sent out

- Meeting 3

  Wednesday June 25, 12:30 pm – 2:30 pm
  Union Station: 401 S Jackson Street

- We will finalize the scheduling of Meeting 4 by Meeting 3

Thank You!