

**Fare Integration Study Findings and  
Preliminary Recommendations**  
Board of Directors  
September 14, 2009



# Study Background

- Board Members' request
  - Interest in new fare technologies
  - Speed up bus travel time
- Future Services
  - Go Local Projects
  - Metrolink Service Expansion Program
  - Bravo!
- Other systems (intra and inter-county)

# Study Scope of Work

- Researched existing and emerging practices
  - Fare integration practices and fare collection technology developments
  - Inter-agency agreements
- Developed and evaluated alternative strategies
- Developed recommendations
- Optional Task – develop technical specifications

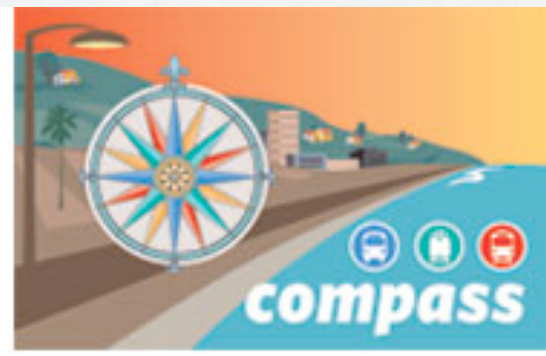
# Fare Integration Practices

- Variety of fare integration approaches
  - Regional passes (e.g., Los Angeles and San Diego)
  - Common regional fare structure (e.g., Seattle)
  - Acceptance of major operator's media by other operators (e.g., Sacramento)
- Range of transfer/upgrade policies
- All four case study regions are introducing regional smart card systems



# Fare Collection Technologies

- Several agencies have fareboxes with same magnetic reader as OCTA but incompatible versions of software
- Los Angeles (LA) and San Diego (SD) agencies have implemented new smart card systems
  - TAP (LA) and Compass Card (SD) systems use same vendor (Cubic); software upgrade should make them compatible



# Payment Technology Trends/Developments

- Emerging technologies
  - Use credit/debit cards for fare payment (e.g., Salt Lake City, NYC, London)
  - Pre-paid fares on bank cards (e.g., LA Metro Visa pilot)
  - Use of cell phones for fare payment (e.g., SF Bay Area pilot)



# Fare/Service Integration

## Existing Systems

- OCTA has inter-agency agreements with 10 agencies
- 46 OCTA routes connect with Metrolink
- 35 Long Beach Transit routes connect with OCTA
- 17 OCTA routes connect with LA Metro
- 10 LA Metro routes connect with OCTA

## Future Systems

- Go Local and other M2 transit projects

# Inter-County Fare Integration

- Equip OCTA buses with stand-beside smart card readers capable of reading:
  - LA Metro TAP cards
  - San Diego Compass cards
  - Contactless credit/debit cards and cell phones
- Supports future Bravo! fare collection





# Services Provided by Other Localities in County

- Laguna Beach Transit – maintain status quo (LBT accepts OCTA passes, OCTA accepts transfers from LBT)
- City of Irvine i-Shuttle - expand university and employer pass programs
- Anaheim Resort Transit – OCTA should accept ART passes



# Go Local Services

- Key Considerations
  - Consider equipping all Go Local services with fare equipment compatible with OCTA's
  - “Stand-beside” smart card solution less expensive than requiring same farebox
- Recommendations
  - Require all Go Local services accept OCTA passes
  - Provide free OCTA-Go Local transfers

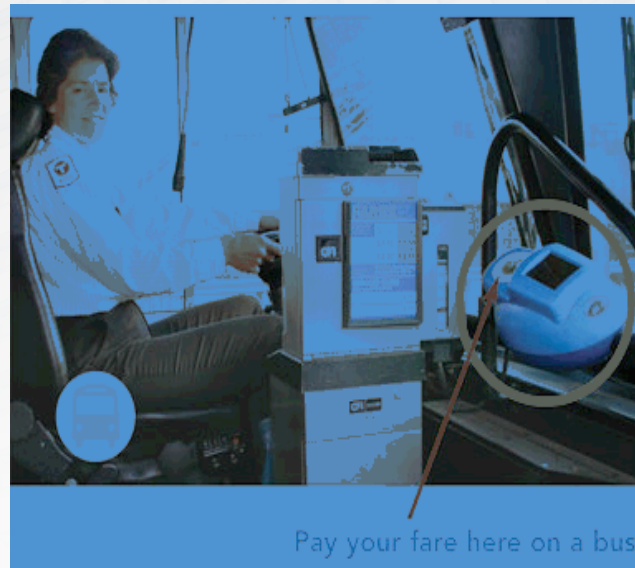
# Orange County Metrolink Service Expansion

- Introduce new Premium Day Pass for trips beginning and ending within Orange County at \$5 or \$6 (current bus only Day Pass is \$4)
- Use existing Metrolink TVMs to vend Premium Day Passes
- Sell Premium Day Pass on OCTA buses



# Upgrading OCTA's Fare System

- Potential approaches
  - Add stand-beside smart card readers: \$4.1m
  - Refurbish existing fareboxes (with smart card): \$5.2m
  - Buy new fareboxes: \$9.0-\$10.5m (depending on magnetic and/or smart card functions)



# Summary

## Recommendations

- Upgrade existing fareboxes: should last another 8-10 yrs.
- Add stand-beside smart card readers; dovetails with recommendation for intra and inter-county fare integration

## Benefits

- Increase revenues
- Reduce fare evasion
- Improve boarding time (travel time)
- Reduce number of fare media
- Reduce maintenance cost (due to less cash transactions)

# Next Steps

- Evaluate integration with radio upgrade project
- Incorporate study findings into Go Local guidelines
- Return to Board with Metrolink premium day pass analysis and recommendation
- Identify funding source