

NORTH COUNTY TRANSIT DISTRICT

FY 2024 SERVICE IMPLEMENTATION PLAN

PRESENTED JUNE 2023



**NORTH COUNTY
TRANSIT DISTRICT**



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I. INTRODUCTION

The Service Implementation Plan (SIP) outlines North County Transit District's (NCTD, District) plans to provide multimodal transit services over the next ten (10) years. The SIP is a requirement under the Master Memorandum of Understanding (MOU) with the San Diego Association of Governments (SANDAG) and is used to inform NCTD's annual operating budget.

The SIP development process consists of the compilation and review of historic service levels, ridership, and studies that outline capital and operating investments for the District. Planning coordinates with Finance, Bus Operations, Rail Operations, and the Executive Director to review and develop the assumptions. Finance staff calculates the cost associated with the proposed services. The costs are then included in the proposed NCTD annual operating budget for Board approval.

The SIP is informed by the Executive Director's budget guidance to inform near-term initiatives and is supplemented by planning studies such as NCTD's Market Research & Analysis effort. The project is near conclusion and includes the following work efforts:

- **Strategic Scenario Planning:** Develop key scenarios based on mobility trends and local market insights to support mobility innovation.
- **Human-Centered Design and Research:** Identify key profiles in the NCTD market and conduct human-centered research to support customers' needs and travel behaviors.
- **Modeling and Impact Analysis:** Rapidly and iteratively evaluate and test the impact of proposed NCTD initiatives, regional policies, and scenario dependencies.
- **Strategy, Roadmap, and Implementation Plan:** Define key initiatives and "no-regret" moves to support NCTD in executing its strategy over the next three to five years.

This work effort will provide NCTD with valuable quantitative and qualitative data that is necessary to make informed decisions. This market research will serve as a key component of NCTD's efforts to increase ridership across the system.

II. KEY ASSUMPTIONS

NCTD used conservative estimates to forecast ridership. The conservative projection is consistent with Board Policy No. 17 - *Budget Development*, which requires staff to conservatively estimate revenues and expenses. The conservative forecast allows NCTD to stress test and confirm that the budget for FY 2024 will be balanced under the assumed worst-case scenario.

Ridership estimates for this year's SIP were based on observed mode-specific ridership trends. Year-over-year (YOY) ridership changes and anticipated service levels for each mode factored into projections. Other unique considerations—such as changing work-commutes, ongoing labor constraints, and evolving land use patterns—continue to influence the phasing of proposed service changes.

III. STRATEGIC PRIORITIES

The FY2024 budget has been developed to support strategic investments that can be implemented over five and ten-year periods that will increase ridership, increase customer revenues, support the Zero Delay program, and address state of good repair and capital priority needs. NCTD's Zero Delay program promotes important initiatives such as improving service quality and frequency, modernizing revenue vehicles, enhancing the customer service experience, and supporting transit-oriented development. Key strategic service priorities that are relevant to the ten-year horizon of the Service Implementation Plan include:

- Implement 30-minute frequencies on the COASTER
- Implement 15-minute frequencies on the SPRINTER
- Implement improved BREEZE bus service frequencies
- Implement new first/last-mile services

NCTD has advanced and is currently advancing a series of studies that will result in transformative capital and operating investments. These studies, which are outlined below, provide a path forward for NCTD's operations, and provide a framework for regional operations on the Los Angeles-San Diego-San Luis Obispo (LOSSAN) Corridor. These studies build upon those completed in previous fiscal years. These strategic planning efforts include:

- **Market Research and Analysis of Post-COVID-19 Trends:** In late 2021, NCTD kicked off a robust study that combines quantitative and qualitative information to properly inform key business decisions over the next three to five years. This work effort will include strategic scenario planning to identify key scenarios based on mobility trends and local market insights post COVID-19; conduct human-centered design and research to support customers' needs and travel behaviors; and modeling and impact analysis of proposed initiatives and policies. Ultimately, this work effort will result in a defined strategy, roadmap, and implementation plan for the District over the next three-to-five years.
- **BREEZE Speed and Reliability Study:** The BREEZE Speed and Reliability Study will build upon the work conducted by the SMTIP by developing a phased infrastructure and technology implementation plan that will support improved BREEZE bus speed and reliability for ten high-priority BREEZE routes and their associated corridors. The completion of this plan and phased implementation will support NCTD's ambitious 5-Year Plan to increase frequency on its core BREEZE bus network to provide fast, frequent, and reliable service on its highest ridership routes combined with shifting lower ridership routes to on-demand service.
- **SPRINTER Corridor 15-Minute Headways Project Study Report:** In 2020, NCTD advanced an evaluation of strategic infrastructure investments along the SPRINTER corridor that would enable NCTD to improve service levels from 30-minute frequencies to 15-minute frequencies. This conceptual study indicated that approximately 9.5 miles of additional double track is needed to achieve this frequency improvement. Based upon

this modeling exercise, NCTD advanced a Project Study Report (PSR) to build upon the study and identify critical phasing for SPRINTER infrastructure investments. The PSR has been completed and NCTD is utilizing its findings to advance funding requests for the SPRINTER corridor.

Other completed studies that help to inform the SIP include the following:

- **LOSSAN Corridor Optimization Study:** The LOSSAN Optimization Study was completed in December 2021 and provides operating concepts for the corridor across a 10-year planning timeframe, including near-term (2022), mid-term (2024), and long-term (2028) operating plans. The study envisions new passenger service operating concepts in which trains operate on pulse schedules, providing regular, reliable, and intuitive connections between different service tiers. In San Diego specifically, this optimized corridor provides a dependable framework for connecting transit services at several Mobility Hubs throughout the region and streamlines connectivity to Orange and Los Angeles Counties. Building upon this effort, NCTD completed the COASTER Operating and Financial Plan in FY 2022, which provided a phased operations roadmap for expanded COASTER service to 30 and 42 trips per day. In coordination with LOSSAN, NCTD and LOSSAN implemented the near-term pulse schedule on October 25, 2021. To advance the pulse scheduling of all three passenger rail operators along the LOSSAN Corridor (NCTD, LOSSAN, and Metrolink), Metrolink has advanced the Metrolink Schedule Integration Study as a follow-on service planning effort to ensure scheduling consistency across the corridor. NCTD is working closely with its partners to achieve near and long-term schedule coordination.
- **NCTD and BNSF Freight Pathing and Passenger Service Extension Study:** In connection to the LOSSAN Corridor Optimization Study, BNSF and NCTD advanced a study to evaluate how capacity on the San Diego Subdivision can be improved to accommodate greater passenger and freight service levels. The study specifically evaluated freight pathing between Control Point (CP) Atwood and the Port of San Diego and passenger service extensions south of downtown San Diego to the Convention Center and National City. As a mid-term (2025) concept, NCTD plans to extend COASTER services to San Diego's Convention Center and Amtrak's Pacific Surfliner service may operate south of Santa Fe Depot to a new maintenance facility. NCTD and BNSF will continue to build upon this study in FY 2024 to evaluate key opportunities for grade crossing and grade separation improvements that will complement greater train activity in the downtown San Diego area.
- **Strategic Multimodal Transit Implementation Plan (SMTIP):** The SMTIP was completed in FY 2022 and is a ten-year strategic plan that identifies service and capital improvements that will support NCTD's efforts to provide high-quality transit services, including the expansion of microtransit service and investment in key BREEZE corridors. This study utilized high-quality data in the form of location-based cell phone data and robust public outreach.

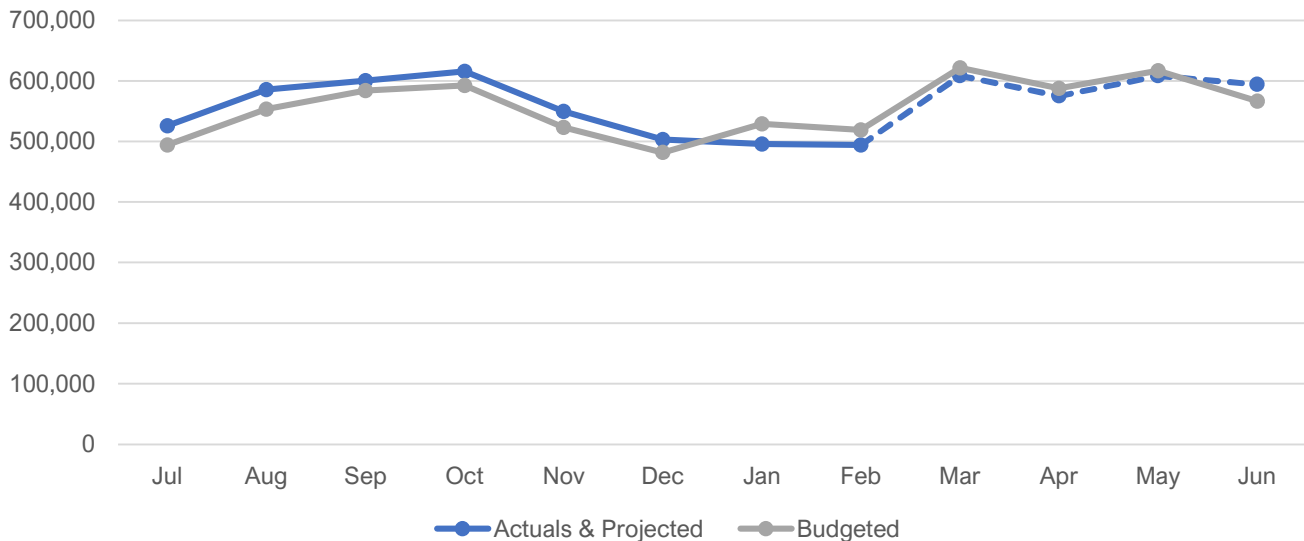
NCTD staff began incorporating the phasing and implementation recommendations associated with these completed plans in the FY 2023 SIP. NCTD continues to augment the SIP with planning studies and related initiatives as they are completed.

IV. FY 2024 SERVICE STATISTICS & RIDERSHIP

With each budget cycle, key transit operations budget metrics are adjusted to reflect actual performance compared to budgeted assumptions. **Appendix A** provides historical performance information about NCTD’s services and performance analysis to support the development of the SIP. FY 2023 projections are comprised of actual hours, miles, and ridership from July 2022 through January 2023.

The FY 2023 SIP was developed in the spring of 2022. At that time, NCTD projected ridership would return to 60-70% of pre-pandemic levels depending on the mode by the end of FY 2023. Projected ridership increases were based on NCTD plans to quickly restore BREEZE service to pre-cut levels, continued growth associated with the expanded COASTER schedule, and the implementation of new FLEX Demand Response services. However, despite not being able to fully restore BREEZE service or launch new microtransit services in FY 2023, **Figure 1** shows systemwide ridership has largely outpaced FY 2023 SIP projections—exceeding budgeted goals for six (6) of the last eight (8) months.

Figure 1. Systemwide Monthly Ridership, FY 2023



NCTD is continuing to explore and advance additional initiatives to attract new riders. The FY 2024 service levels and ridership forecasts by mode are summarized in **Table 1**. All hours and miles are based upon scheduled daily service and applied to the number of weekdays, Saturdays, and Sundays in FY 2024. In addition, efforts are made to plan and account for absolute work windows, holidays, and special events in service projections.

Table 1. Proposed Operating Statistics and Ridership, FY 2024

Mode	Revenue Miles	Total Miles	Revenue Hours	Total Hours	Ridership
BREEZE	5,036,198	5,753,111	407,664	436,253	5,012,514
SPRINTER	519,820	521,793	23,630	23,751	1,359,932
COASTER	402,943	426,855	12,378	13,749	932,822
LIFT	1,043,578	1,229,424	57,728	75,571	102,503
FLEX	313,014	326,729	16,937	17,723	46,135
Systemwide	7,315,553	8,257,912	518,337	567,047	7,453,906

BREEZE

NCTD began to experience operator staffing constraints in April 2021, which led to varying degrees of service cancellations on NCTD’s BREEZE service throughout FY 2022. As a result of the operator shortage, NCTD had to temporarily reduce peak frequencies on several BREEZE routes effective April 3, 2022. This change was considered temporary and was implemented to allow NCTD to communicate service cancellations in advance to its customers. NCTD has advanced various strategies to recruit and retain operators, including increased wages, sign-on bonuses, and performance-based incentives. In addition, it has been actively working with its service contractor, MV Transportation, to hire and retain operators to improve service reliability and restore service. Phased restoration of BREEZE service will begin with the partial restoration of BREEZE 350 service in April 2023. For the purposes of the FY 2024 SIP, NCTD is assuming the second phase of BREEZE service restoration will take effect in Q2 of FY 2024 (October service change) and full service restoration will take place in Q4 of FY 2024. NCTD continues to work closely with MV Transportation to improve operator staffing levels in an effort to restore service. NCTD staff will provide updates to the Board at regular intervals on this progress.

In FY 2023, NCTD reclassified school tripper deviations of BREEZE routes as Supplemental Routes and assigned them to a new 600-numbering series. These routes included: 304, 308, 309, 332, 334, and 445. The changes were made to improve communication with riders and parents and simplify internal operations and tracking functions. The change has been complemented by the region’s on-going Youth Opportunity Pass pilot program, which provides free transit in San Diego County for youth ages 18 and under through June 30, 2024.

As shown in **Figure 2**, BREEZE ridership in FY 2023 has consistently surpassed budgeted goals and is projected to continue doing so despite operating at temporarily reduced frequencies on certain routes.

Figure 2. BREEZE Monthly Ridership, FY 2023

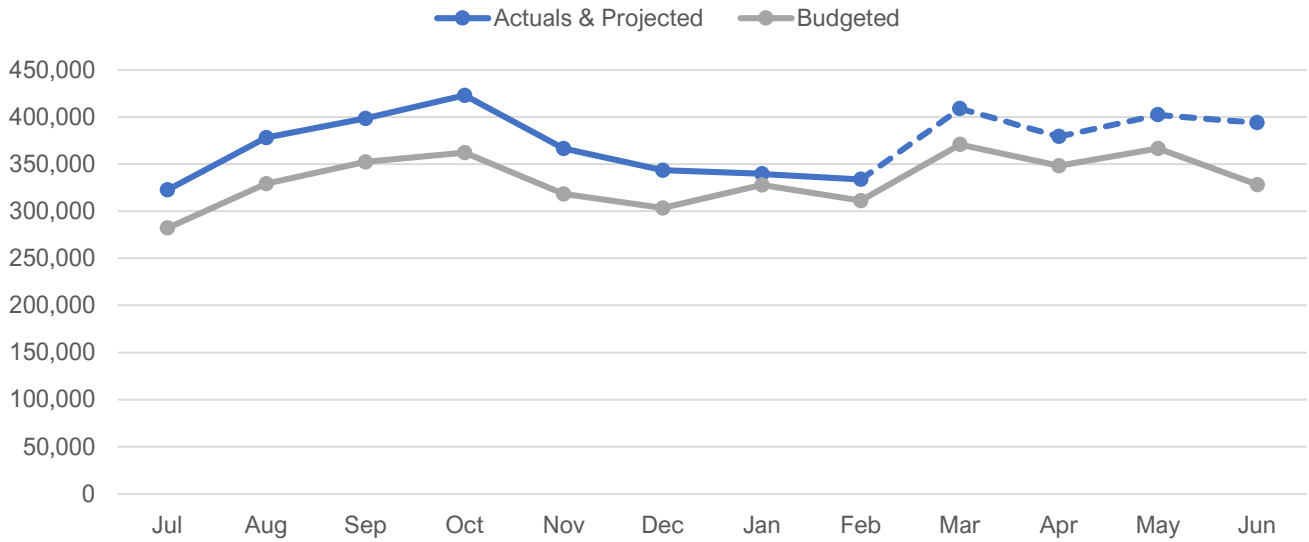


Figure 3 shows BREEZE actual ridership for FY 2022 and projected ridership for FY 2023 and FY 2024. As detailed in **Table 2**, ridership is expected to increase by 11.6% from FY 2023 to FY 2024, while service levels are expected to increase about 8% on average.

Figure 3. BREEZE Ridership - Actuals and Projected

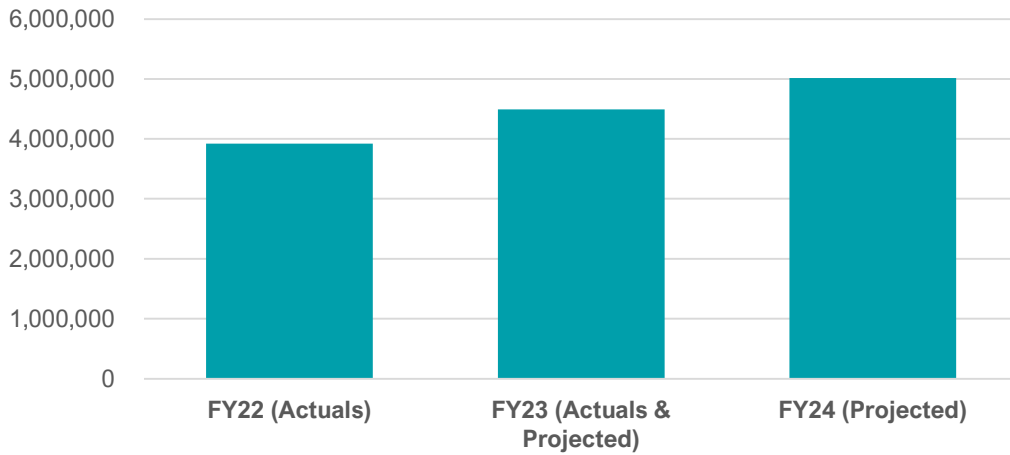


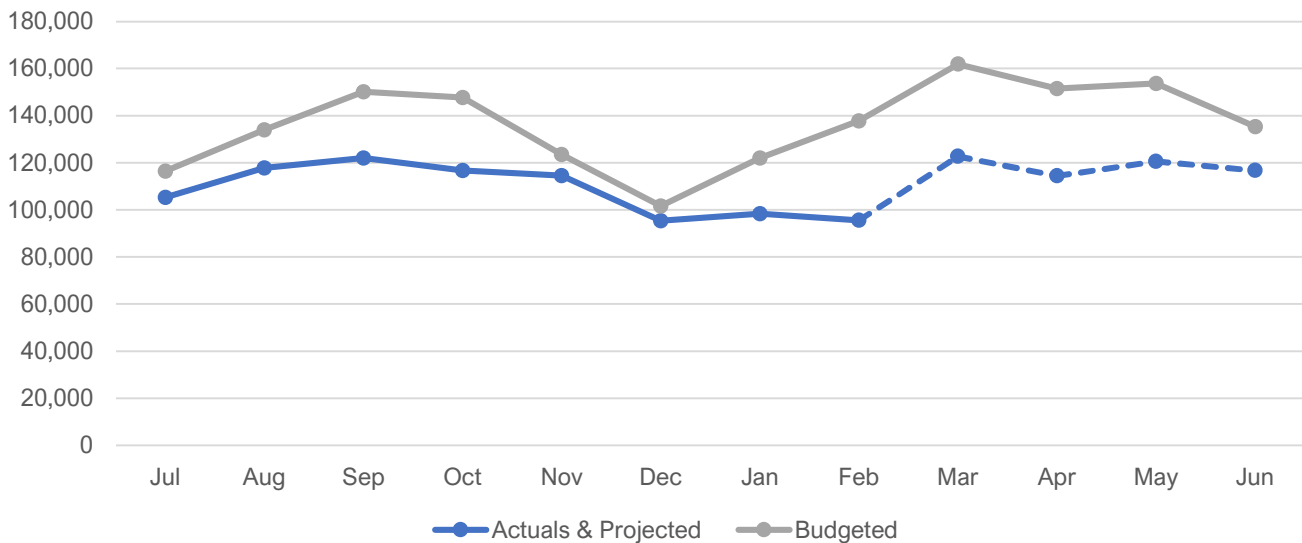
Table 2. BREEZE Operating Statistics and Ridership, FY 2022 - FY 2024

BREEZE	FY 2022 Actuals	FY 2023 Actuals & Projected	FY 2024 Proposed	Change from FY 2022 to FY 2024	Change from FY 2023 to FY 2024
Total Ridership	3,918,669	4,490,805	5,012,514	27.9%	11.6%
Total Revenue Miles	4,937,883	4,699,655	5,036,198	2.0%	7.2%
Total Miles	5,523,685	5,318,400	5,753,111	4.2%	8.2%
Total Revenue Hours	404,761	377,633	407,664	0.7%	8.0%
Total Hours	432,115	406,086	436,253	1.0%	7.4%

SPRINTER

SPRINTER provides direct service to Cal State San Marcos and Palomar College. As a result, NCTD anticipated that a return to in-person learning to both schools would help increase ridership by 21.6% in FY 2023. However, as shown in **Figure 4**, SPRINTER ridership has consistently underperformed monthly budgeted goals in FY 2023 and is on course for an 18% deficit compared to FY 2023 SIP projections.

Figure 4. SPRINTER Monthly Ridership, FY 2023



As illustrated in **Figure 5**, SPRINTER is projected to continue its trend of modest ridership gains in FY 2024. **Table 3** shows ridership is expected to increase by only 1.5% from FY 2023 to FY 2024. In addition, no SPRINTER service changes are proposed for FY 2024 and any

changes in service levels reflect slight variations in the share of weekdays, Saturdays, and Sundays in a year.

Figure 5. SPRINTER Ridership - Actuals and Projected

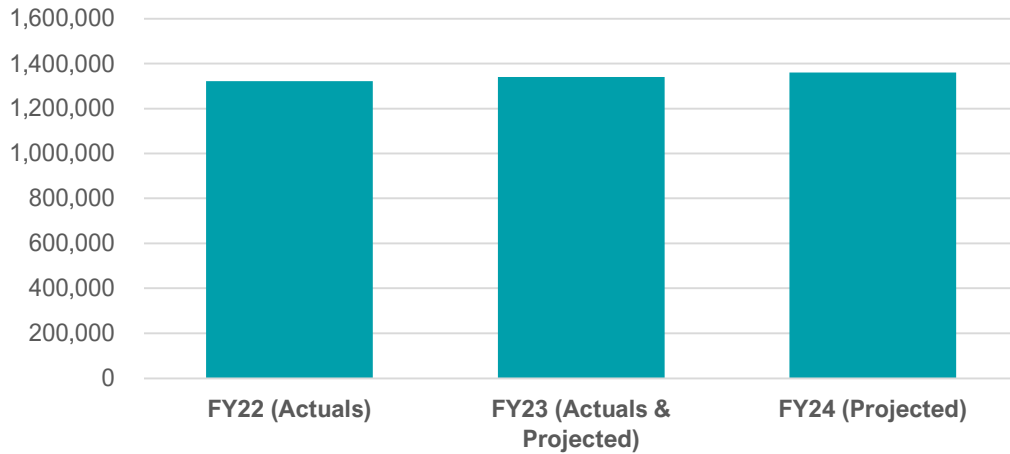


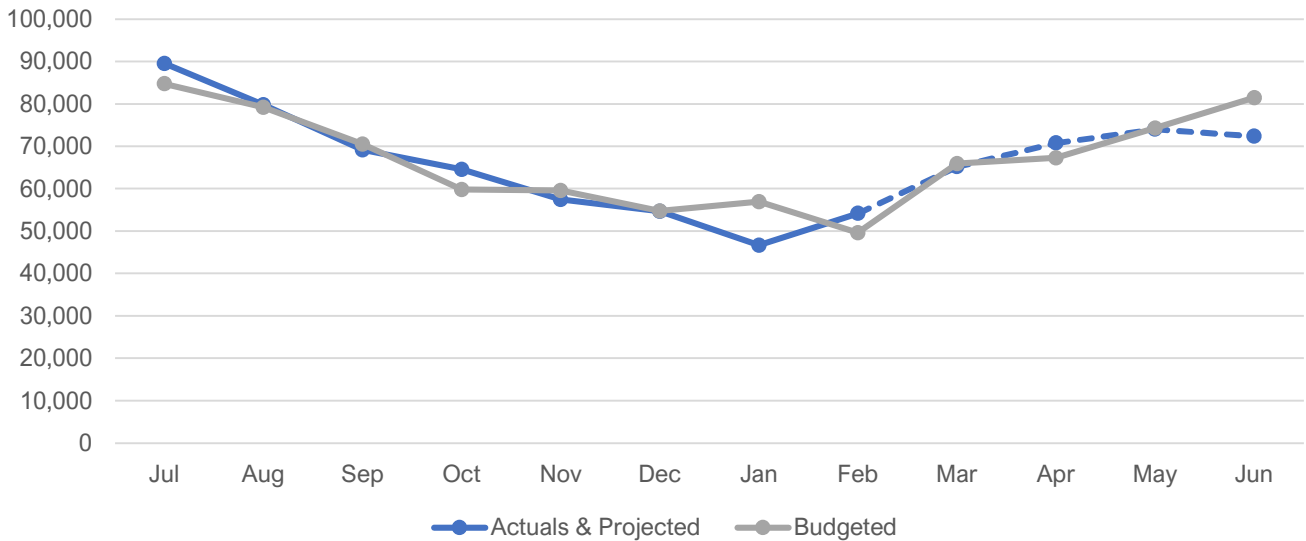
Table 3. SPRINTER Operating Statistics and Ridership, FY 2022 - FY 2024

SPRINTER	FY 2022 Actuals	FY 2023 Actuals & Projected	FY 2024 Proposed	Change from FY 2022 to FY 2024	Change from FY 2023 to FY 2024
Total Ridership	1,322,380	1,340,187	1,359,932	2.8%	1.5%
Total Revenue Miles	514,468	517,655	519,820	1.0%	0.4%
Total Miles	518,217	520,172	521,793	0.7%	0.3%
Total Revenue Hours	23,375	23,542	23,630	1.1%	0.5%
Total Hours	23,548	23,649	23,751	0.9%	0.4%

COASTER

On October 25, 2021, the District increased weekday and weekend COASTER service to better serve leisure riders and commuters with flexible work schedules. In response to the expanded schedule and past ridership trends, NCTD anticipated ridership would increase 35.3% in FY 2023. Although the traditional COASTER commuter market continues to be impacted by evolving work-commute patterns, NCTD has seen steady growth in daily ridership since the service expansion. Additionally, current FY 2023 ridership data continues to show more robust demand for COASTER service on weekends and for special events (i.e., Padres games and concerts). As shown in **Figure 6**, COASTER monthly ridership in FY 2023 has mostly kept pace with budgeted goals.

Figure 6. COASTER Monthly Ridership, FY 2023



NCTD’s Board of Directors approved the purchase of two new COASTER trainsets in 2019. They are expected to arrive in late FY 2023 and will enable NCTD to expand COASTER service to 36 weekday trips per day. The FY 2024 SIP assumes this expanded service beginning in April 2025, subject to delivery and acceptance of the trainsets prior to service launch.

Based upon FY 2023 ridership, NCTD is projecting ridership increase by roughly 17% in FY 2024 and roughly 11% in FY 2025. **Figure 7** shows actual and projected COASTER ridership for FY2022 through FY2024.

Figure 7. COASTER Ridership - Actuals and Projected

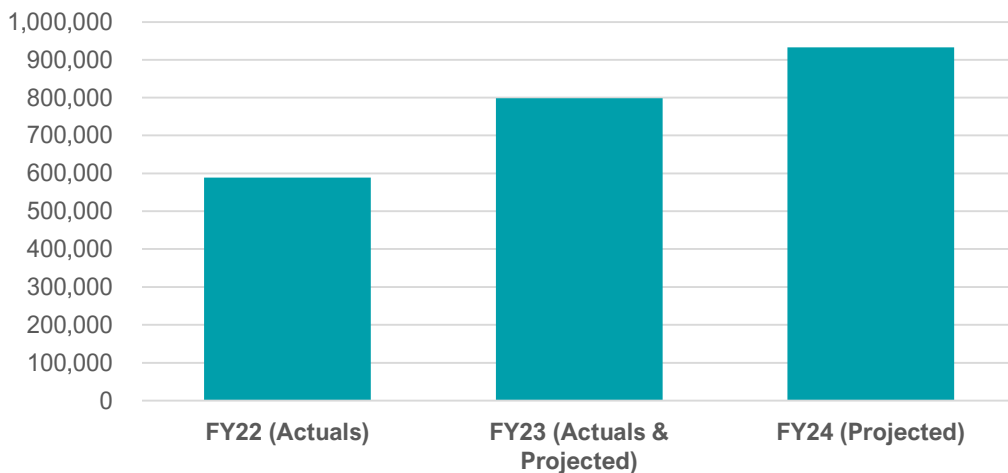


Table 4 compares the COASTER FY 2024 proposed statistics to FY 2022 actuals and to FY 2023 actuals and projected statistics. Projected changes to service levels are due to slight variations in the share of weekdays and weekends. Future phases of COASTER service expansion are not anticipated until Spring 2025 and Spring 2027, subject to delivery and acceptance of NCTD’s capacity-enhancing trainsets.

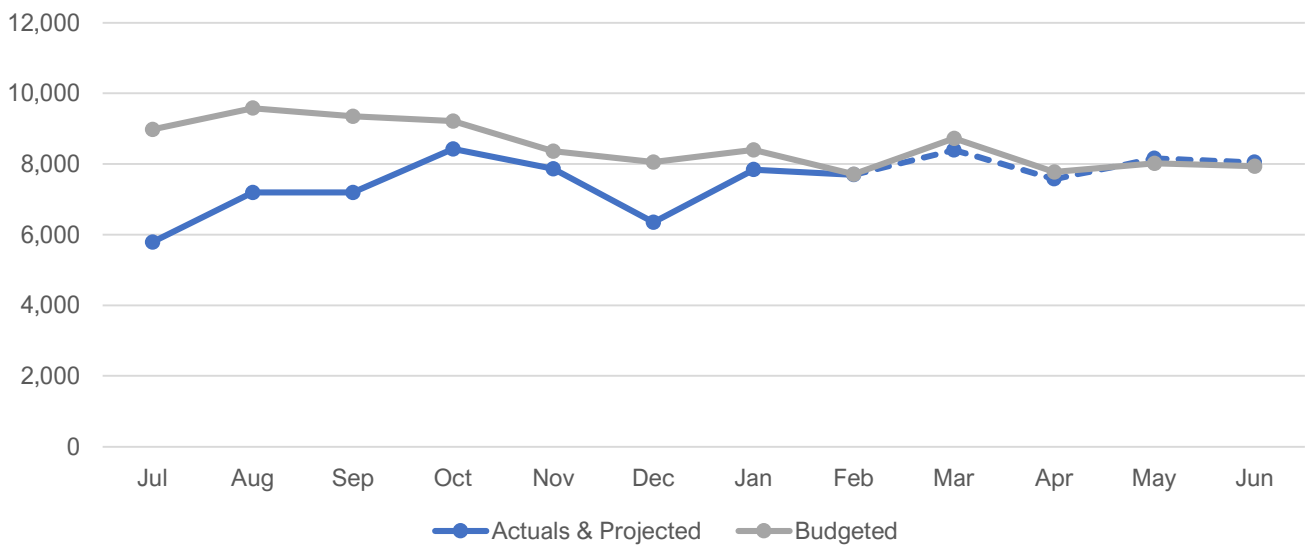
Table 4. COASTER Operating Statistics and Ridership, FY 2022 - FY 2024

COASTER	FY 2022 Actuals	FY 2023 Actuals & Projected	FY 2024 Proposed	Change from FY 2022 to FY 2024	Change from FY 2023 to FY 2024
Total Ridership	588,409	798,328	932,822	58.5%	16.8%
Total Revenue Miles	363,121	402,315	402,943	11.0%	0.2%
Total Miles	385,097	424,664	426,885	10.8%	0.5%
Total Revenue Hours	11,566	12,615	12,378	7.0%	-1.9%
Total Hours	12,929	13,998	13,749	6.3%	-1.8%

LIFT

As shown in **Figure 8**, LIFT ridership has mostly trailed budgeted goals in FY 2023 but has started to trend in a positive direction in the last two months.

Figure 8. LIFT Monthly Ridership, FY 2023



LIFT ridership is projected to grow by 12.4% in FY 2024. **Figure 9** below shows LIFT actual and projected ridership for FY2022 through FY2024.

Figure 9. LIFT Ridership - Actuals and Projected

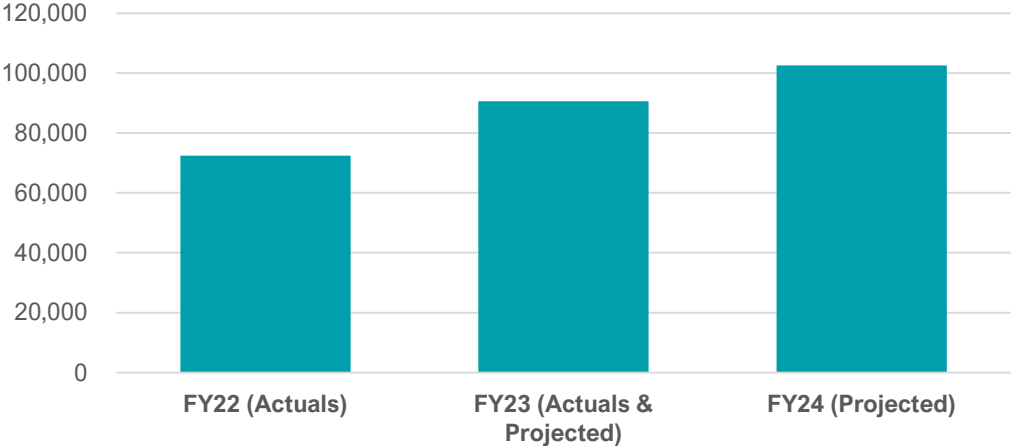


Table 5 compares the LIFT FY 2024 proposed statistics to the FY 2022 Actuals and to the FY 2023 Projected. Revenue hours are expected to increase by 16% and ridership by 12.4% from FY2023 to FY2024. Because LIFT is a demand response service, any increase in ridership will result in an increase in hours and miles operated.

Table 5. LIFT Operating Statistics and Ridership, FY 2022 - FY 2024

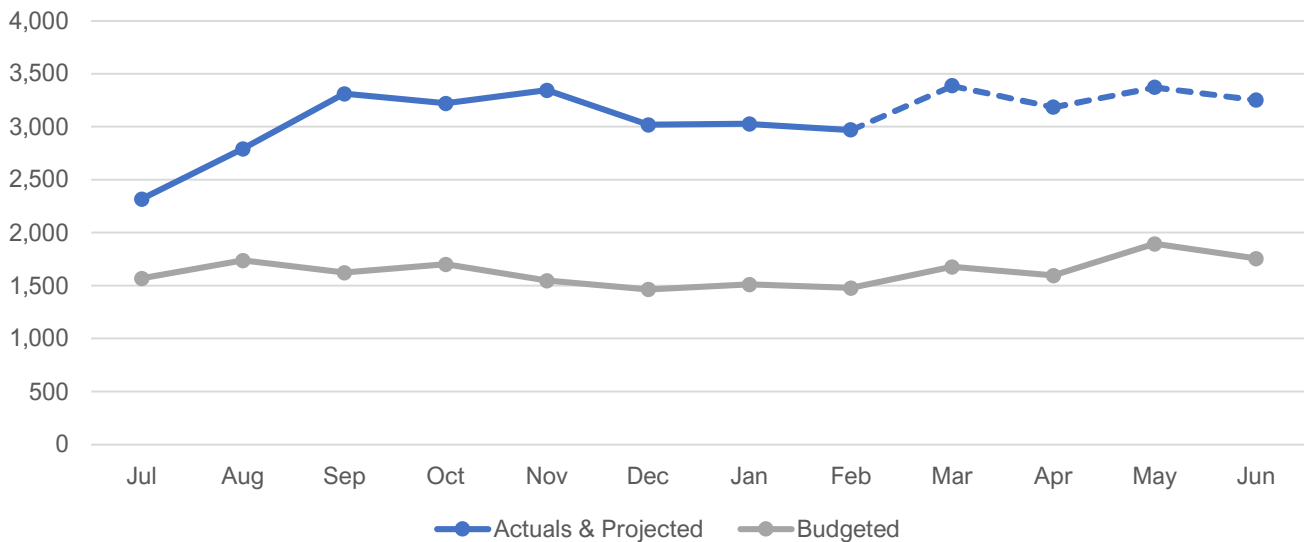
LIFT	FY 2022 Actuals	FY 2023 Actuals & Projected	FY 2024 Proposed	Change from FY 2022 to FY 2024	Change from FY 2023 to FY 2024
Total Ridership	72,376	90,569	102,503	41.6%	13.2%
Total Revenue Miles	734,694	898,200	1,043,578	42.0%	16.2%
Total Miles	874,311	1,058,343	1,229,424	40.6%	16.2%
Total Revenue Hours	39,661	49,692	57,728	45.6%	16.2%
Total Hours	48,137	65,026	75,571	57.0%	16.2%

FLEX Deviated Fixed Service

FLEX deviated fixed service has two different service models—deviated fixed-route and point-deviated fixed-route. Deviated fixed-route service has a set schedule and route but can deviate from the route up to $\frac{3}{4}$ of a mile for scheduled pick-ups or drop-offs. This service model includes FLEX 392 and FLEX 395 which connection portions of Camp Pendleton and Oceanside. Point-deviated fixed-route service also has a set schedule and route but only allows scheduled deviations to specific points along the route. FLEX 371 is the only point-deviated fixed route. It connects Escondido and Ramona and allows passengers to schedule pick-ups or drop-offs at the San Diego Zoo Safari Park.

In October 2020, NCTD proposed eliminating FLEX Routes 392 and 395 due to low performance. However, based on public feedback, NCTD staff recommended continued evaluation of alternative service delivery options. As shown in **Figure 10**, FLEX Deviated Fixed Service has consistently outperformed expectations in FY 2023 and by large margins. However, FLEX routes consistently have lower ridership than all BREEZE routes. **Appendix A** provides greater details regarding recent performance of FLEX routes and how they compare to BREEZE routes.

Figure 10. FLEX Deviated Fixed Service Monthly Ridership, FY 2023



NCTD is not proposing any changes to FLEX deviated fixed services in FY 2024. Ridership, however, is projected to increase 24% compared to FY 2023 projections. **Figure 11** illustrates anticipated ridership growth from FY 2022 through FY 2024.

Figure 11. FLEX Deviated Fixed Routes Ridership - Actuals and Projected

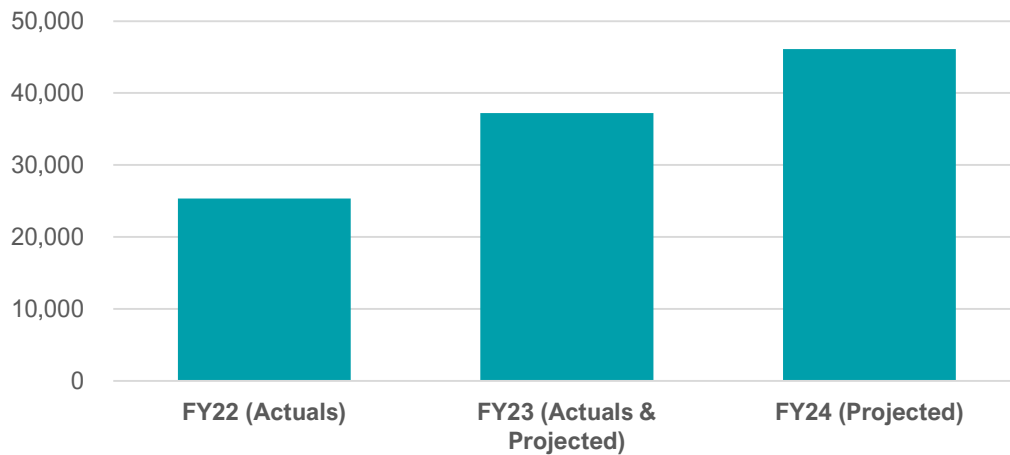


Table 6 compares the FLEX Deviated Fixed Routes proposed statistics to the FY 2022 Actuals and to the FY 2023 Projected. NCTD will continue to work with representatives from Camp Pendleton, relevant stakeholders, and the public to develop an alternative plan to replace FLEX routes 392 and 395 with a service delivery model that meets the region’s needs.

Table 6. FLEX Deviated Fixed Service Operating Statistics and Ridership, FY 2022 - FY 2024

FLEX - Deviated Fixed Routes	FY 2022 Actuals	FY 2023 Actuals & Projected	FY 2024 Proposed	Change from FY 2022 to FY 2024	Change from FY 2023 to FY 2024
Total Ridership	25,332	37,194	46,135	82.1%	24.0%
Total Revenue Miles	315,831	317,597	313,014	-0.9%	-1.4%
Total Miles	328,136	329,124	326,729	-0.4%	-0.7%
Total Revenue Hours	16,893	16,980	16,937	0.3%	-0.3%
Total Hours	17,675	17,765	17,723	0.3%	-0.2%

NCTD+ Microtransit Services

The FY 2023 SIP included the implementation of three microtransit zones: Sorrento Valley, Carlsbad, and San Marcos. These zones were not implemented as planned, given the ongoing operator shortage and additional time was needed to procure the software provider which will provide the software as a service for a well-defined microtransit system. Additional time is also needed to pilot the ridership demand for the different zones in North County before implementing permanent service. All future on-demand first-last mile (microtransit) services will be branded as NCTD+.

The first NCTD+ pilot program was launched with Lyft, Uber, and Tripshot on January 6, 2022. The one-year pilot program provided discounted first and last mile connections for commuters using the Sorrento Valley and Carlsbad Poinsettia COASTER stations. The pilot gave riders up to a \$7.50 credit toward trips to and from the Sorrento Valley or Carlsbad Poinsettia COASTER stations within defined geographic zones. On January 7, 2023, NCTD launched a second NCTD+ pilot program providing discounted first and last mile connections for riders using the Vista Transit Center. These pilot programs are part of the District's broader mobility-as-a-service program (NCTD+). These pilot programs will inform microtransit planning and pilots that will take place in FY 2024 to prepare for microtransit implementation in FY 2025.

At NCTD's April 20, 2023 Board of Directors Meeting, the Board approved a contract with Spare Labs Inc. to provide software-as-a-service for NCTD's microtransit services. NCTD will mobilize the software and public-facing application for use in NCTD+ microtransit pilots. As operator resources become available, NCTD will plan to deploy pilot zones within FY2024 with expenditures captured separately. Long-term implementation of these zones will be incorporated into future year SIPs upon successful completion of pilot programs.

V. SERVICES SUPPORTED BY NCTD

In addition to the services outlined in the SIP, NCTD supports the provision of services by other operators that allow NCTD passengers greater flexibility and access to key destinations.

Sorrento Valley COASTER Connections

The San Diego Metropolitan Transit System (MTS), through an agreement with NCTD, operates Sorrento Valley COASTER Connection (SVCC) shuttle service during weekday peak periods between the Sorrento Valley COASTER Station and surrounding employment areas. Per the agreement, NCTD pays MTS half the annual operating cost, plus \$1 per rider. FY2022 total annual ridership was 26,824, an increase of 170% over FY2021 ridership of 9,935. Given its role in providing first-last mile connections from the Sorrento Valley COASTER Station, SVCC ridership is closely tied to COASTER performance and has benefited from increased COASTER ridership.

In FY2020, a partnership between UCSD, MTS, and NCTD was established to provide service between the Sorrento Valley COASTER Station and UCSD to replace the eliminated UCSD-operated shuttles. Per the agreement, MTS operates the shuttle service serving the same COASTER trips that other SVCC routes do, and NCTD reimburses MTS for the operating cost of the service. As of November 15, 2021, UCSD ended its obligations under the agreement and no longer subsidizes the service. NCTD and MTS continue to provide the service as a critical COASTER connection to UCSD.

Amtrak Rail-2-Rail Program

NCTD and Amtrak's Rail-2-Rail program allows COASTER day and monthly pass holders to ride any Amtrak Pacific Surfliner train at no extra cost (blackout days apply). This provides NCTD COASTER customers with additional options without the additional costs of operating more COASTER trains. Per the agreement, NCTD reimburses Amtrak \$4.44 per rider. Ridership was 1,155 in FY 2022 which was 202% above FY 2021 ridership of 383.

VI. TEN-YEAR OUTLOOK

Each year, the Executive Director develops the proposed budget guidance and strategic areas of focus for the District. This framework is reviewed and approved by NCTD's Executive Committee and Board of Directors each Spring, which supports the development of the annual operating and capital budget. Consistent with this framework, the SIP includes the following objectives:

- **Strengthen network foundations**
 - **BREEZE:** Increase off-peak BREEZE frequencies beginning in FY 2025.
 - **BREEZE:** Increase BREEZE frequencies from every 30-minutes to 15-minutes on core BREEZE routes beginning in FY 2025.
 - **BREEZE:** Identify specific transit-supportive capital and service improvements to increase reliability on NCTD's core BREEZE routes through the BREEZE Speed and Reliability Study.
 - **SPRINTER:** Increase SPRINTER frequencies from 30-minutes to 15-minutes, commensurate with double-tracking investments beginning in FY 2032
 - **COASTER:** Increase COASTER frequencies through FY 2025 with expanded peak and midday trips.
 - **COASTER:** Provide direct connections to key activity centers, such as construction of the fully-funded Convention Center Station that will provide a one-seat ride to the Gaslamp Quarter, Convention Center, and Petco Ballpark. COASTER extension to Convention Center is anticipated to occur in late FY 2026.
 - **FLEX:** Transition existing FLEX deviated-fixed routes to BREEZE fixed-route and BREEZE commuter bus service, pending finalized analysis.
- **Fill in network gaps with on-demand service**
 - **FLEX:** Pilot on-demand microtransit service to fulfill first/last mile connections to high-frequency corridors.
 - **LIFT:** Maintain quality LIFT service as demand is expected to grow with an aging population.

Figure 12 shows actual and projected ridership and service levels from FY 2022 through FY 2033 with future service changes shown.

Tables 7 through 12 show annual operating statistics by mode through FY 2033. As a note, these tables reflect a transition from FLEX Deviated Fixed Route to other modes, pending completed financial and operational analyses.

Figure 12. Systemwide Actual and Projected Ridership, FY 2022 – FY 2033

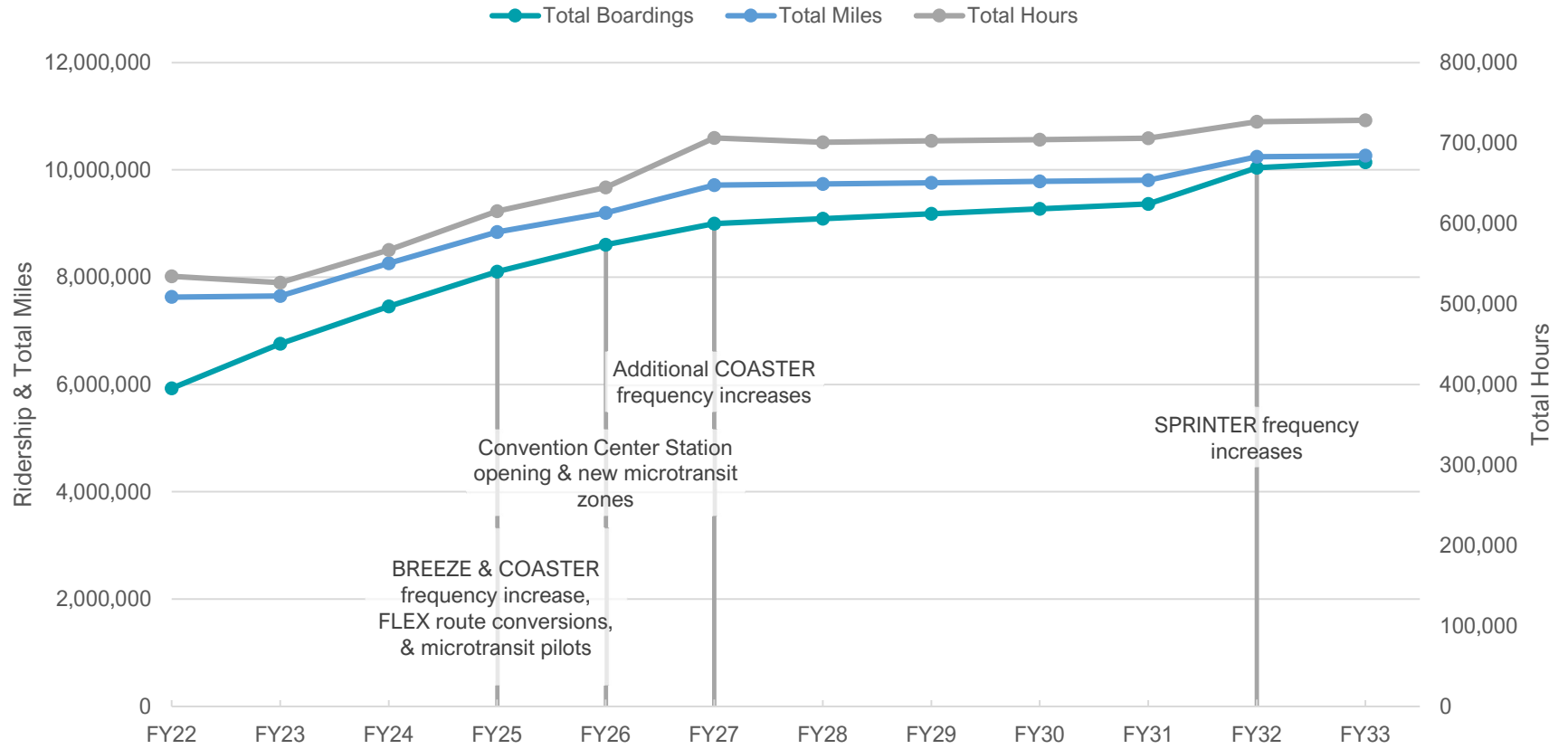


Table 7. BREEZE Operating Statistics, FY 2024 – FY 2033

BREEZE	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033
Total Ridership	5,012,514	5,532,825	5,847,123	6,013,199	6,073,331	6,134,064	6,195,405	6,257,359	6,319,933	6,383,132
Total Revenue Miles	5,036,198	5,516,807	5,593,293	5,623,400	5,623,400	5,623,400	5,623,400	5,623,400	5,623,400	5,623,400
Total Miles	5,753,111	6,290,084	6,344,008	6,320,702	6,320,702	6,320,702	6,320,702	6,320,702	6,320,702	6,320,702
Total Revenue Hours	407,664	444,635	449,872	449,872	449,872	449,872	449,872	449,872	449,872	449,872
Total Hours	436,253	476,574	482,276	485,862	485,862	485,862	485,862	485,862	485,862	485,862

Table 8. BREEZE Commuter Bus Operating Statistics, FY 2024 – FY 2033

BREEZE Commuter	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033
Total Ridership		25,581	34,103	34,444	34,788	35,136	35,487	35,842	36,200	36,562
Total Revenue Miles		95,308	127,348	127,335	127,335	127,335	127,335	127,335	127,335	127,335
Total Miles		101,141	135,140	135,128	135,128	135,128	135,128	135,128	135,128	135,128
Total Revenue Hours		5,050	6,747	6,747	6,747	6,747	6,747	6,747	6,747	6,747
Total Hours		5,370	7,176	7,175	7,175	7,175	7,175	7,175	7,175	7,175

Table 9. SPRINTER Operating Statistics, FY 2024 – FY 2033

SPRINTER	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033
Total Ridership	1,359,932	1,376,996	1,390,766	1,404,674	1,418,721	1,432,908	1,447,237	1,461,709	2,059,432	2,080,026
Total Revenue Miles	519,820	519,026	519,282	519,282	519,282	519,282	519,282	519,282	929,484	929,484
Total Miles	521,793	520,973	521,405	521,405	521,405	521,405	521,405	521,405	933,285	933,285
Total Revenue Hours	23,630	23,593	23,593	23,593	23,593	23,593	23,593	23,593	42,230	42,230
Total Hours	23,751	23,714	23,829	23,829	23,829	23,829	23,829	23,829	42,652	42,652

Table 10. COASTER Operating Statistics, FY 2024 – FY 2033

COASTER	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033
Total Ridership	932,822	1,030,076	1,149,136	1,252,940	1,265,469	1,278,124	1,290,905	1,303,814	1,316,852	1,330,021
Total Revenue Miles	402,943	418,272	468,412	491,030	496,483	496,483	496,483	496,483	496,483	496,483
Total Miles	426,855	443,102	495,978	521,405	523,536	523,536	523,536	523,536	523,536	523,536
Total Revenue Hours	12,378	12,845	14,455	23,593	15,371	15,371	15,371	15,371	15,371	15,371
Total Hours	13,749	14,274	16,053	23,829	16,908	16,908	16,908	16,908	16,908	16,908

Table 11. LIFT Operating Statistics, FY 2024 – FY 2033

LIFT	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033
Total Ridership	102,503	109,342	113,034	114,942	116,091	117,252	118,425	119,609	120,805	122,013
Total Revenue Miles	1,043,578	1,112,242	1,149,347	1,351,126	1,364,633	1,378,280	1,392,069	1,405,986	1,420,045	1,434,245
Total Miles	1,229,424	1,310,205	1,353,857	1,382,112	1,395,928	1,409,888	1,423,993	1,438,230	1,452,611	1,467,136
Total Revenue Hours	57,728	61,521	63,574	64,890	65,538	66,194	66,856	67,524	68,200	68,882
Total Hours	75,571	80,560	83,249	97,805	98,783	99,771	100,769	101,776	102,794	103,822

Table 12. FLEX Deviated Fixed Routes Operating Statistics, FY 2024 – FY 2033

FLEX Deviated Fixed Route	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033
Total Ridership	46,135	11,743								
Total Revenue Miles	313,014	78,766								
Total Miles	326,729	82,216								
Total Revenue Hours	16,937	4,259								
Total Hours	17,723	4,458								

Table 13. FLEX Demand Response Operating Statistics, FY 2024 – FY 2033

FLEX Demand Response	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	FY 2031	FY 2032	FY 2033
Total Ridership		17,145	70,344	177,534	179,309	181,102	182,913	184,742	186,589	188,455
Total Revenue Miles		58,045	258,256	682,278	689,099	695,990	702,950	709,979	717,077	724,248
Total Miles		90,811	345,122	832,482	840,805	849,213	857,705	866,281	874,942	883,692
Total Revenue Hours		9,434	29,844	62,502	63,127	63,758	64,396	65,040	65,690	66,347
Total Hours		10,177	32,242	67,622	68,298	68,981	69,671	70,367	71,071	71,782

Appendix A: FY2022 System Performance

The North County Transit District (NCTD) evaluates service performance annually based on established standards. NCTD’s budgetary outlook and service performance guide staff recommendation to the Board of Directors regarding service levels. By monitoring performance, NCTD can identify the highest performing routes where additional service could be added, or conversely, identify the routes that are underutilized and should be considered for modification or elimination and reinvestment.

This Appendix includes route-level performance data through Fiscal Year (FY) 2022. FY 2023 performance is reported through the Annual Transit Operations Performance Report, which is presented to the Board alongside the Annual Comprehensive Financial Report after the end of the fiscal year.

SYSTEMWIDE HISTORICAL RIDERSHIP & FAREBOX RECOVERY

Table 1 below shows historical ridership trends by mode from FY2020 through FY2022. California reopened and ended most of its COVID-19 restrictions on June 15th, 2021. As a result, ridership increased by over a million boardings from FY 2021 to FY 2022. Ridership, however, still lagged FY 2020 performance, which was not impacted by the pandemic until the fourth quarter (Q4). In addition, COVID surges associated with delta and omicron variants had a negative impact on FY 2022 ridership.

Table 1. NCTD Passenger Boardings from FY 2020 – FY 2022

Mode	FY 2020 Boardings	FY 2021 Boardings	FY 2022 Boardings	Change from FY 2020 – FY 2022
BREEZE	5,135,360	2,990,643	3,918,669	-23.7%
SPRINTER	2,066,091	1,225,435	1,322,380	-36.0%
COASTER	944,109	162,707	588,409	-37.7%
LIFT	116,437	57,427	72,376	-37.8%
FLEX	30,813	21,547	25,332	-17.8%
Systemwide	8,292,810	4,457,759	5,927,166	-28.5%

NCTD is required under the Transportation Development Act (TDA) to maintain a farebox recovery of 18.8% for all modes of service combined, excluding paratransit, which has a 10% farebox recovery requirement. TDA allows the exclusion of certain operating costs and the supplementing of fare revenues with local funds to satisfy farebox recovery requirements. NCTD

is consistent with state guidance in making the allowable adjustments and readily exceeds the minimum farebox recovery requirement under TDA rules. Farebox recovery trends from FY 2020 to FY 2022 are shown in **Table 2**.

Table 2. NCTD Farebox Recovery Ratio¹ from FY 2020 – FY 2022

Mode	FY 2020 Farebox Recovery	FY 2021 Farebox Recovery	FY 2022 Farebox Recovery	Change from FY 2020 – FY 2022
BREEZE, FLEX, COASTER, & SPRINTER	34.9%	25.4%	33.2%	-1.7%
LIFT (Paratransit)	13.4%	13.2%	12.5%	-1.0%

MODAL & ROUTE-LEVEL PERFORMANCE

In this Appendix, NCTD utilizes boardings per revenue hour to measure the performance of each route and mode. By normalizing ridership by service levels and allows, NCTD is able to fairly evaluate performance and more effectively monitor services or modes implemented during the five-year plan. In addition, NCTD’s Annual Transit Operations Performance Report provides a comprehensive report of performance, including metrics like on-time performance and contractor adherence to minimum performance standards.

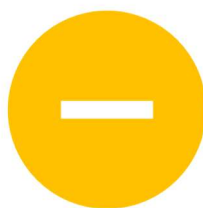
BREEZE Performance

Each BREEZE route is ranked by boardings per revenue hours and grouped into three categories as outlined below:



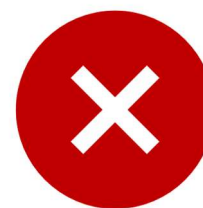
PASS:

Route scores 80% of the median or above



MONITOR:

Route scores between 21% and 79% of the median



DEFICIENT:

Route scores below 20% of the median

¹ As reported to the California State Controller’s Office, farebox recovery ratios with local support include other local revenue sources and exclude allowable operating costs.

This route-level performance is reported annually. Internally, NCTD assesses route-level ridership performance more frequently to inform monthly reporting. If a route is deemed deficient for an entire fiscal year, NCTD may take measures to improve the route, including:

- Targeted marketing of the route
- Service span and/or frequency modifications
- Restructuring of the route

Tables 3, 4, and 5 show BREEZE route performance for FY2022 for Weekday, Saturday, and Sunday service, respectively. The three lowest performing BREEZE routes on weekdays were:

- BREEZE 347, a local route in San Marcos impacted by ongoing construction and remote instruction at CSU San Marcos and Palomar College
- BREEZE 325, a limited local route in Carlsbad designed to supplement BREEZE 315 service
- BREEZE 444, a Carlsbad Poinsettia COASTER Connection commuter route that only operates during peak hours

However, while several routes fell into the “Monitor” category, no BREEZE route performed in the deficient range.

Table 3. FY 2022 Weekday BREEZE Route Performance

Route	Operating Cost	Average Daily Boardings	Boardings per Revenue Hour	Score
356	\$387,812	254	14.55	178%
350	\$1,759,164	926	14.22	174%
303	\$4,280,632	2,039	13.90	170%
351/352	\$1,465,638	869	13.65	167%
305	\$2,458,221	930	11.80	145%
388	\$1,689,597	406	11.36	139%
355/357	\$675,323	247	10.27	126%
301	\$4,600,585	1,326	9.97	122%
354	\$928,938	359	9.64	118%
306	\$1,537,731	370	9.21	113%
304	\$1,622,996	451	8.96	110%
332	\$2,156,246	604	8.94	110%
302	\$2,982,793	843	8.59	105%
318	\$1,227,711	356	8.15	100%
358/359	\$404,700	113	7.94	97%
311	\$497,589	120	7.93	97%
313	\$706,862	200	7.86	96%
308	\$1,485,795	239	7.40	91%
309	\$3,948,792	862	7.37	90%
353	\$386,040	112	7.00	86%
445	\$350,934	67	5.93	73%
334	\$403,524	95	5.36	66%
323	\$521,131	85	5.05	62%
315	\$1,716,801	285	5.05	62%
444	\$145,587	23	4.82	59%
325	\$711,814	109	3.77	46%
347	\$677,882	102	3.63	45%

Table 4. FY 2022 Saturday BREEZE Route Performance

Route	Operating Cost	Average Boardings	Boardings per Revenue Hour	Score
356	\$47,040	142	15.15	172%
351/352	\$177,622	544	14.25	162%
388	\$589,485	1,353	14.09	160%
303	\$170,209	380	13.92	158%
350	\$70,031	102	11.80	134%
301	\$435,495	579	11.02	125%
354	\$444,779	649	10.87	124%
305	\$319,997	443	10.55	120%
306	\$61,914	121	9.96	113%
332	\$866,292	1,316	8.86	101%
355/357	\$231,381	293	8.80	100%
302	\$179,100	185	8.46	96%
318	\$95,633	115	7.65	87%
304	\$678,711	614	7.06	80%
309	\$192,861	202	6.49	74%
308	\$289,642	229	5.55	63%
315	\$62,149	35	4.72	54%
353	\$76,912	67	4.06	46%
334	\$254,373	137	2.86	33%
325	\$44,023	27	2.85	32%
347	\$56,116	27	2.45	28%

Table 5. FY 2022 Sunday BREEZE Route Performance

Route	Operating Cost	Average Boardings	Boardings per Revenue Hour	Score
356	\$47,040	142	15.15	172%
351/352	\$177,622	544	14.25	162%
388	\$589,485	1,353	14.09	160%
303	\$170,209	380	13.92	158%
350	\$70,031	102	11.80	134%
301	\$435,495	579	11.02	125%
354	\$444,779	649	10.87	124%
305	\$319,997	443	10.55	120%
306	\$61,914	121	9.96	113%
332	\$866,292	1,316	8.86	101%
355/357	\$231,381	293	8.80	100%
302	\$179,100	185	8.46	96%
318	\$95,633	115	7.65	87%
304	\$678,711	614	7.06	80%
309	\$192,861	202	6.49	74%
308	\$289,642	229	5.55	63%
315	\$62,149	35	4.72	54%
353	\$76,912	67	4.06	46%
334	\$254,373	137	2.86	33%
325	\$44,023	27	2.85	32%
347	\$56,116	27	2.45	28%

SPRINTER Performance

SPRINTER service operates regular headways seven days a week, with hourly service provided during weekend mornings and evenings. As illustrated in **Table 6**, SPRINTER performance is typically higher on weekdays due to school and work trips. In addition, the boardings per revenue hours across all day types illustrate how efficient the SPRINTER is at moving people.

Table 6. FY 2022 SPRINTER Performance

Day Type	Average Daily Boardings	Boardings Per Revenue Hour
Weekday	4,104	58.96
Saturday	2,690	49.94
Sunday	2,241	47.24

COASTER Performance

As shown in **Table 7**, COASTER service increased significantly between FY 2021 and FY 2022. NCTD had temporarily reduced service in March 2020 in response to the COVID-19 pandemic

and steep declines in ridership. In late FY 2021, NCTD restored service to pre-pandemic levels, and then expanded service in the 2nd quarter of FY 2022. As a result, ridership grew considerably in FY 2022. **Table 8** illustrates the growing importance of weekend service to overall COASTER ridership and, like the SPRINTER, the efficiency of COASTER as a mode of transportation.

Table 7. COASTER Service Changes

Schedule	Temporarily Reduced Service	May 2021 Restored Service	October 2021 Service Expansion
Weekday	12	22	30
Saturday (Summer)	0	12	20
Saturday (Winter)	0	8	20
Sunday	0	8	20

Table 8. FY2022 COASTER Performance

Day Type	Average Daily Boardings	Boardings Per Revenue Hour
Weekday	1,746	47.58
Saturday	1,735	76.86
Sunday	1,176	54.37

LIFT Performance

NCTD operates LIFT paratransit service as required by the Americans with Disabilities Act (ADA). It operates as a complementary service to fixed route service, which means it operates during the same hours and serves the same service area as fixed routes. In addition, although NCTD cannot modify paratransit service, it can improve service efficiency. NCTD has achieved greater efficiency by subcontracting service to taxi providers and increasing the number of shared-ride trips.

Due to the increased health risks faced by many paratransit riders, LIFT boardings were significantly reduced during the pandemic. As a result, While LIFT performance has improved compared to FY 2021, it saw fewer boardings per revenue hour than all BREEZE routes. **Table 9** illustrates LIFT performance in FY 2022.

Table 9. FY 2022 LIFT Performance

Day Type	Average Daily Boardings	Boardings Per Revenue Hour
Weekday	244	1.86
Saturday	110	1.63
Sunday	66	1.55

FLEX Performance

NCTD has provided FLEX demand response, deviated fixed-route, and point-deviated fixed-route services since 2011. Designed to better serve suburban, tribal, and rural areas, FLEX service provides coverage-based transit access for lower-density areas without requiring a 40-foot bus operating a 15 or 30-minute frequency fixed-route service. As a result, FLEX routes generally underperform fixed-route service. **Table 10** compares all weekday FLEX route performance to the lowest performing weekday BREEZE routes. In FY 2022, all three FLEX routes had less boardings per revenue hour than the lowest performing BREEZE routes but only FLEX 392 and 395, which serve Camp Pendleton, had scores putting them in the “Deficient” category.

Table 10. FY 2022 FLEX Weekday Route Performance Compared to Lowest Performing BREEZE Routes

Route	Operating Cost	Average Boardings	Boardings per Revenue Hour	Score
444	\$145,587	23	4.82	61%
325	\$711,814	109	3.77	47%
347	\$677,882	102	3.63	46%
371	\$629,257	29	3.00	38%
395	\$576,325	16	1.33	17%
392	\$1,781,732	33	1.12	14%