

## Background

During the 2017 budget deliberations, means testing and subsidy programs were discussed in the areas of recreation and transit services. At the December 6, 2016 Finance and Administration Committee, Council requested a report on means testing and subsidies for the City of Greater Sudbury (City) programs.

At the City Council Meeting on November 22, 2017, a report entitled Affordable Access Conceptual Framework provided an overview of affordable access to programs and services within the Community Development Department, as well as an overview of best practices from other municipalities and associations with respect to means testing and program subsidies. At this meeting, a resolution was passed to adopt ten (10) Principal Statements for the development of future affordable access programs.

Building from Affordable Access Principal Statements adopted by Council, best practice in the Transit Industry and with consideration to Population Health and the City of Greater Sudbury's Corporate Strategic Plan, this report will:

- Provide an overview of fare structure considerations;
- Undertake a peer review and analyze Greater Sudbury Transit's fare structure;
- Present a proposed Affordable Transit Fare Policy; and
- Provide three Affordable Transit Fare Structure options.

## Fare Structure Considerations

In a Transit Fare Structure, the price of each trip changes based on how people chose to pay (cash, tickets, day pass, monthly pass) and discounts offered (discounts for children, seniors, disability pensioners and students). Together these fees make up the fare structure. The fare structure is a result of prioritizing and balancing goals such as:

- Generating revenue;
- Encouraging ridership; and
- Providing a social good.

Ultimately everyone pays for a transit system through taxes, and therefore it is important that a fare structure is carefully considered to ensure a balanced approach to subsidizing the service.

When reviewing a fare structure for the City of Greater Sudbury's Transit System, the following five questions must be considered:

- Who benefits from the Transit Services?
- What types of fare subsidy can be provided?
- What strategic goals are guiding the fare policy?
- What are best practices for a Transit Fare Policy?
- How will the impact of Fare Policies be measured?

## Who benefits from Transit Services?

Transit Services benefit individuals and society at large. When an individual uses transit, they receive an affordable transportation option. But there are also numerous public benefits from an individual's use of Transit Services – reduced traffic congestion, reduced vehicular air pollutants and greenhouse gas emissions, economic productivity and community connectedness.

As investments are made in Transit Services, the whole community benefits when ridership increases. When setting a fare structure, considerations on the impact of ridership relative to fare increase or decrease is important. Lowering fares make the service more affordable and increases ridership, while higher fares allows to expand service but may have a negative impact on ridership.

## What types of fare subsidy can be provided?

Transit Services are subsidized both through common subsidies and targeted subsidies.

A common subsidy is defined as a subsidy provided to all users of a service and is applied to enhance public benefits by making a service widely available. The subsidy is provided through user fees, contracts which generate revenues such as advertising and sale of vending machine goods, taxes and Provincial Gas Tax Funding.

The cost to provide Transit Services as per the 2018 budget is estimated at approximately \$22,200,000. The table below provides a breakdown of how the service is being subsidized.

	Revenue Source	Total	R/C Ratio
<b>User Fees</b>	Cash & Tickets	\$ (4,040,000.00)	18%
<b>User Fees</b>	Passes	\$ (2,560,000.00)	12%
<b>User Fees</b>	Upass	\$ (1,290,000.00)	6%
<b>User Fees</b>	Handi Transit	\$ (225,000.00)	1%
<b>Contract</b>	Advertising, Other	\$ (312,000.00)	1%
<b>Provincial Gas Tax</b>	Gas Tax	\$ (775,000.00)	3%
<b>Tax Levy</b>	Tax levy	\$ (13,000,000.00)	59%
<b>Total Operating Cost</b>	2018 Budget	\$ 22,202,000.00	

A targeted subsidy is defined as an additional subsidy offered to specific groups on top of the common subsidy already provided to the service. Affordability is one factor that typically encourages the use of targeted subsidies, incentives to promote transit and increase ridership is another. Targeted subsidies are justified on the basis that by removing accessibility barriers, more people use the services, which enhances both private (affordability) and public benefits (ridership).

Target subsidies should be provided with a specific intention of achieving a desired City result, and not provided arbitrarily or for reasons of historical precedent. Greater Sudbury Transit currently provides targeted subsidies to groups based on their income,

age, and student status with inconsistent discounts. These subsidies are not necessarily addressing affordability in an equitable manner, as they are mostly based on age instead of income. For example, a high-income senior citizen using transit receives a steep discount, while a low-income adult does not. This creates inequity and does not maximize the service or meet affordability goals. A more results-oriented approach to targeted subsidies would instead focus on individuals with financial barriers, or for all Transit Users equally to promote ridership.

### **What strategic goals are guiding the fare policy?**

Fare discounts are a way to accomplish community goals such as reducing traffic congestion, improving air quality and providing affordable transportation for people who aren't able to or cannot afford to drive.

At the Council Meeting March 8, 2016, Council adopted the Greater Together: 2015-2018 Corporate Strategic Plan, which identified key areas of focus for the organization:

- Growth and Economic Development;
- Responsive, Fiscally Prudent, Open Governance;
- Quality of Life and Place; and
- Sustainable Infrastructure.

At the Council Meeting on November 22, 2017, a report entitled Population Health – Community Priorities identified ten (10) community priorities for population health. These priorities, which support Quality of Life and Place by improving individual health and well-being, were endorsed by Council.

*In this report, population health was defined as: "an approach to health that aims to improve the health of the entire population and to reduce health inequities among population groups. In order to reach these objectives, it looks at and acts upon the broad range of factors and conditions that have a strong influence on our health."*

Access to public transit not only contributes to the health of an individual, but to neighborhoods and the City overall. Efficient, frequently available public transit is an essential service for a community, as it enables access to employment, education, health services, food and recreation. Transit also promotes greater social interaction and social inclusion, especially with the ageing population.

While public transit is beneficial to everyone, it is particularly important for low income individuals, who typically heavily rely on the service as they are less able to afford a personal vehicle, or other means of transportation. Despite their reliance, the cost of fares can be a burden, and may limit their use of the service. Reducing fares for low income individuals allow them to better participate in the community, work at a greater range of locations, and provide employers with a larger, more mobile labor market to draw from.

By removing financial barriers for access to Transit Services and adopting affordable fare policies, the above strategic goals adopted and supported by Council will be met, create a positive outcome on population health and play a role in creating a healthy, transparent, inclusive community.

### **What are best practices for a Transit Fare Policy?**

On January 23, 2018 a report entitled Draft Greater Sudbury Transit Action Plan was presented to Council. Within this draft plan, best practices on fares were outlined and are being presented in this report for consideration.

Transit fare revenues are needed to off-set transit costs. A best practices philosophy with respect to balancing transit costs with revenues is to have a fare pricing policy which:

- Rewards frequent transit customers;
- Offers equitable discounts;
- Encourages ridership; and is
- Easy to implement, comprehend, and operate

Transit fare policy objectives typically include:

- Establishing targets for the proportion of annual operating costs covered by system-generating revenues such as user fees, gas tax, and contract revenues;
- Designating the demographic groups for which fare discounts or special fare programs are offered;
- Designating the type of fare categories offered within each demographic group; and
- Establishing consistent relationships amongst the values of the various fare categories.

When translating these larger goals and objectives into specific fare structure choices and policy, fare pricing best practices encompass the following typical recommendations:

#### Cash Fare:

- Set a base cash fare that applies to all transit customers to improve simplicity and ease of use. Since cash fares are typically used by infrequent transit customers, this cash fare should also be higher relative to prepaid fares like tickets and passes which reward regular customers.
- The cash fare chosen should minimize the number of coins required. Therefore, increasing fares less often but using increments of \$0.25 is more advisable than annual increases of smaller amounts using dimes and nickels.

#### Target Groups:

- When offering a further discount to target groups, the rates of discount should be identical, usually expressed as a "concession" price separate from the "adult" ticket and pass price. This will maximize equity across vulnerable groups, minimize administrative overhead, fare product procurement, and will simplify the overall fare structure making it easier to understand.

#### Discounts:

- Create a reward system for frequent transit customers by implementing prepaid fares such as tickets that are priced 20% below the base cash fare, or tickets that are set at a rate that easily expresses their value, such as "6 rides for the price of 5."
- The deepest discount is typically applied to monthly passes, with amounts set at 25-30 times the base cash fare rate as per industry practice. However, if this formula was applied to the current fare structure, the cost of an Adult Pass would be between \$87.50-\$105 and a concession pass would be between \$74.40-\$89.25. This would result in an increase in fares, especially for Seniors, Disability Pensioners and Children. To provide affordable structure options, instead of revenue generating options, the range amounts should be set at 16-25 times the base cash fare rate.

#### Future Fare Increases

- Fare increases are required to meet the rising cost of transit service delivery. As a rule, transit customers are less sensitive to fare increases if it means maintaining or expanding transit service. Since the vast majority of transit customers are captive to transit, it is logical to assume that the ability to get to and from work or travelling for other trip purposes takes precedence over the transit fare price.
- In order to reduce the number of coins a person needs to carry, it is suggested that future cash fares be increased in 25-cent increments while discounts offered on tickets and passes be increased to a lesser degree each year.

#### **How will impact of Fare Policies be measured?**

An analysis of the expected impact on revenues should be undertaken when considering any changes in fare structure. In this regard, with the current fare collection system, Greater Sudbury Transit retains records of fare payment by passenger classification and fare type (% cash, % tickets, % monthly and day passes). This enables the Transit Department to calculate the impact on other fare categories to have an average increase in line with Council direction.

The following table provides 2017 ridership counts by fare category, the number of units (cash, tickets and passes) sold, and the approximate revenue received. This information will be used to forecast revenue impacts of fare changes in the Options presented in this report.

Category	Unit Sold	# Rides	2017 Revenue
Cash	482734	482734	\$1,595,000.00
Cash Child	5246	5246	\$ 12,000.00
Cash Older	14688	14688	\$ 35,000.00
Cash Special	11445	11445	\$ 27,000.00
5 Ride Adult	42424	214866	\$ 530,000.00
10 Ride Adult	44801	442942	\$1,110,000.00
5 Ride Reduced	7578	37561	\$ 70,000.00
10 Ride Reduced	12394	123244	\$ 235,000.00
1 Ride All	80744	86970	\$ 217,000.00
1 Ride All	3100	3100	\$ 5,000.00
Day Pass	780	2675	\$ 7,000.00
Family Pass	692	27884	\$ 10,000.00
UPASS	6400	534425	\$1,257,000.00
31 Day Adult	10810	716090	\$ 993,000.00
31 Day Student	11931	692662	\$ 950,000.00
31 Day Older	3412	176966	\$ 177,000.00
31 Day Special	8514	457397	\$ 440,000.00
Photo ID			\$ 19,000.00
Vendor agreement 1% discount for resale			\$ (10,000.00)
Affordable Transit Pass		1425	\$ (59,000.00)

To further improve the necessary monitoring of the impact on future fare increases, a smart card system should be considered with future funding opportunities.

Benefits of using smart cards are summarized as follows:

- Eliminates the need to print and distribute tickets, passes and transfers, thereby reducing fare collection costs
- Eliminates fare evasion
- Reduces boarding times
- Flexibility in fare pricing
- Ease of implementing fare changes

## Analysis of Current Fare Structure

To develop an understanding of issues and opportunities which should be addressed to meet the goal of an affordable access to Transit Services, a peer review analysis was undertaken as well as a detailed analysis of the current fare structure against the fare considerations outlined in this report.

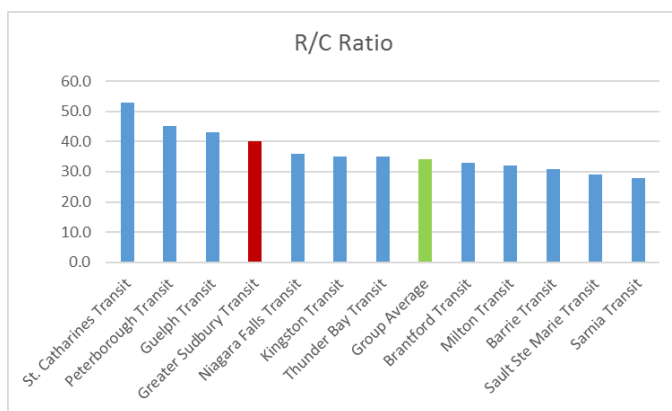
## Peer Review

To compare how Greater Sudbury Transit's fare structure measures to other Canadian cities, data was collected from the Canadian Urban Transit Association's 2016 Canadian Transit Fact Book. The book lists all reporting transit agencies in Canada, grouping them according to population size. Greater Sudbury Transit is one of 12

Ontario Municipalities within its population group. Comparisons between transit systems are difficult to interpret because the factors affecting transit policies and fare policies in particular vary considerably from city to city based on their goals and operational requirements. The analysis provides a threshold measure which can be used to assess where a fare should be compared to Greater Sudbury Transit's Fare policy goal.

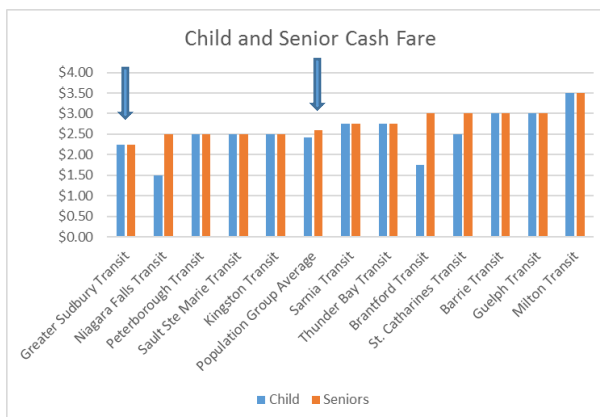
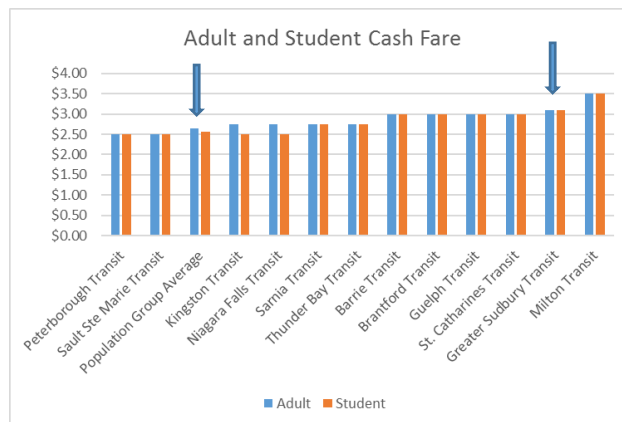
### Recovery to Cost Ratio:

The most common way to describe the level of subsidy is a ratio of the revenue collected and the total operating cost of providing Transit Services. This ratio is referred to as "Recovery of Cost" which is abbreviated as "R/C" and is often shown as a percentage. Greater Sudbury Transit's R/C was 40% in 2016 which is 6% above the Ontario Group Average. This ranks Greater Sudbury Transit's R/C ratio as the 4<sup>th</sup> highest amongst peers.



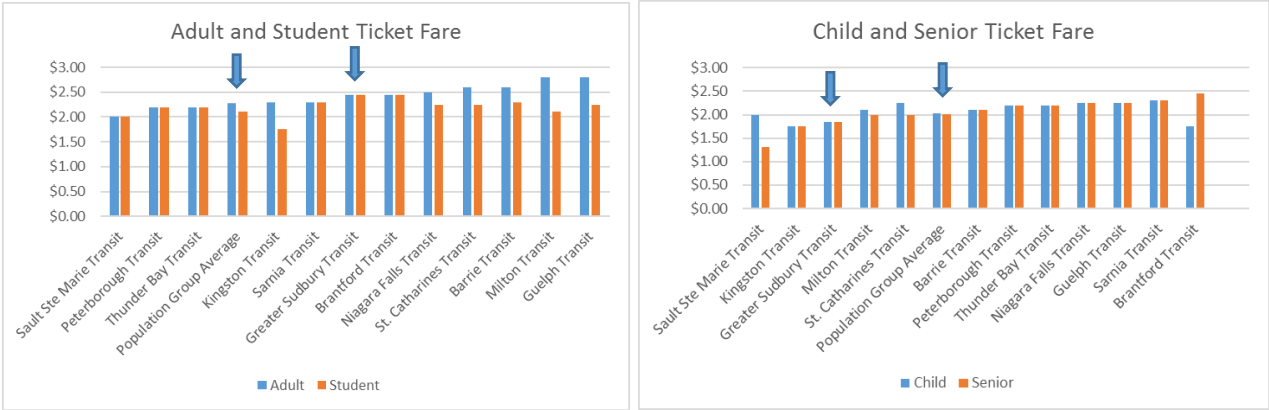
### Cash Fares:

Most peer municipalities offer the same cash fare for all categories. The Adult and Student fare priced at \$3.10 were one of the highest in the group and well above the group average of \$2.65. The Child and Senior fares at \$2.25 were amongst the deepest discounted with the group average being \$2.42 and \$2.60 respectively.



Multi-Ride Tickets:

All cities offer discounts to encourage loyalty through purchase of multiple trips. Referred to in Canadian Urban Transit Association's (CUTA) reporting as 'Unit Price', the table below presents the single fare rates based on a purchase of a multi-ride card. The adult ticket fare at \$2.45 was slightly higher than the group average, but was midway compared to all municipalities. Students ticket fares offered at the same fee of adults at \$2.45 was the highest within the group. Seniors and children are one of the deepest discount offered compared to peers.



Monthly Pass:

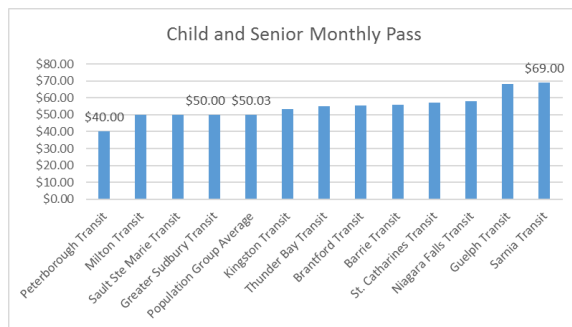
Discounts are generally provided at the highest levels of loyalty, such as monthly passes.

The Adult monthly pass in 2016 was \$84 where the highest was priced at \$92.00 and the lowest at \$60.00, with an average of \$71.16. This would indicate that although within range, the adult pass could be slightly adjusted with a deeper discount to be closer to the Peer Group Average. The Student monthly pass valued at \$78.00 in 2016 was the highest within the Peer Groups.





The Child and Senior monthly pass is in line with the population group average valued in 2016 at \$50.00. This indicates that the fares for seniors and children are within the range of an affordable rate as compared to Peer Municipalities.



### Miscellaneous User Fee By-Law

The City currently offers cash, ticket and pass fares in various combinations to the broad demographic categories of adult, seniors, children and post-secondary students.

The table below provides the 2018 Fare Structure approved by Council under the Miscellaneous User Fee By-Law (By-Law).

2018 Fare Structure	Cash	5 Ride	10 Ride	31 Day	Other
Adult	\$ 3.30	\$ 13.00	\$ 26.00	\$ 90.00	
Student	\$ 3.30	\$ 13.00	\$ 26.00	\$ 82.00	
Seniors	\$ 2.40	\$ 10.00	\$ 20.00	\$ 54.00	
Disability Pensioners	\$ 2.40	\$ 10.00	\$ 20.00	\$ 54.00	
Children	\$ 2.40	\$ 10.00	\$ 20.00	\$ 54.00	
Day Pass					\$ 10.00
Family Pass					\$ 16.00
Laurentian Upass					\$ 190.00

A further analysis of the current fare structure against the fare structure considerations outlined in this report highlights several issues and opportunities.

<b>Target Groups</b>	
<p>Under the current By-Law there are 5 (five) targeted groups which are defined as follows:</p> <ul style="list-style-type: none"> <li>• “Infant” is a person under the age of 5 years of age.</li> <li>• “Child” means a person who is 5 years of age or older and who is no taller than 60 inches</li> <li>• “Student” is a person who presents a current and valid student identification card from a high school or a post-secondary educational institution.</li> <li>• “Senior” is a person 65 years of age or older</li> <li>• “Disability Pensioner” is a person who is a recipient of a Disability Pension from the Province of Ontario, a Canada Disability Pension, a War Veteran’s Pension or who is registered with the Canadian Institute for the Blind as confirmed by the appropriate authority.</li> </ul>	
<p><u>Issue:</u> Height measurements on a “child” does not necessarily describe all children between the age of 5 and 12 which is the demographic that this target is aiming to define.</p>	<p><u>Opportunity:</u> A new group called “youths” should be created and be defined as a person who is 5 to 12 years of age.</p>
<b>Cash Fares</b>	
<p>The Cash fare rate is the same for Adult and Student categories, and provides a 27% discount for all other categories. The current exact cash fares of \$3.30 for adults and students requires a minimum of 4 coins.</p>	
<p><u>Issues:</u> If the correct change is not readily available, a transit customer is likely to round up or down the cash fare paid. Cash fares should be the same for all Transit Users.</p>	<p><u>Opportunity:</u> To mitigate over and under payments, and reducing frustration for the passenger to try to find the correct change, the cash fare should be set at an increment of \$0.25. Cash fare should be the same for all Transit Users which will reward frequent customers who chose to purchase tickets or passes.</p>
<b>Multi-Ride Cards</b>	
<p>The current fare structure provides a \$0.70 discount per ride to Adults and Students and \$0.40 discount per ride to Seniors, Disability Pensioners and Children based on their respective cash fare. Multi-Ride Ride cards are offered in 5 &amp; 10 ticket format for each category. This means that 6 types of tickets are designed with separate coding for tracking purposes, which is administratively challenging to manage.</p>	
<p><u>Issue:</u> Students do not receive a targeted discount. There are too many multi-ride cards available. 5 ride cards only provide two full trips, and then leaves the passenger with one remaining trip before requiring another card.</p>	<p><u>Opportunity:</u> Create a maximum of two groups – adults and concession and provide only a 6 ride card for purchase.</p>

Monthly Passes	
A 31-day pass provides unlimited rides to a single cardholder within a 31-day period. To calculate the incentive for the passenger, the pass fee is divided by the cash fare, which provides the number of rides paid for – any additional rides taken within the 31-day period are essentially free. Adults are paying for 27 rides, Students for 25 Rides and Disability Pensioners, Seniors and Children pay for 23 rides with a 31-Day pass.	
<u>Issues:</u> The current average use for 31-day cardholders is approximate 60 trips per month. These passes are purchased by individuals who rely heavily on the service as their mode of transportation. Low-income adults often have difficulties paying the full adult monthly pass fare, and they chose to buy ride cards from week to week, and limit their trips due to financial barriers.	<u>Opportunities:</u> The Adult fare should be affordable to a person with financial barriers; and attractive overall to entice a new ridership base. To achieve an equitable and affordable fare structure, offering a universal pass should also meet the goal of increasing ridership. If opting for concession fare pricing, students should be included in the targeted groups.
Unlimited Day Pass	
Two types of unlimited day passes are offered. The day pass provides unlimited rides in a 24-hour period at the cost of 3 rides for one person. The family day pass provides unlimited rides in a 24-hour period to a maximum of two adults and three children at the cost of 5 rides.	
<u>Issue:</u> The cards can only be purchased at the Kiosk. Therefore, prior planning is required to have the passes purchased in advance. The passes have not had any considerable uptake.	<u>Opportunity:</u> With smart card Technology, a person could board the bus and ask for an unlimited pass or pre-load their card from their personal electronic device.
Employer Passes	
A discounted Adult 31-day pass based on bulk purchase from one employer is made available through a 6-month commitment. Discounts vary based on volume of passes purchased.	
<u>Issue:</u> This program has been unsuccessful and no commitment has been made since the inception of the program.	<u>Opportunity:</u> Marketing efforts should be undertaken to promote the Employer Pass. The discount based on number of cards used should be reviewed to provide an incentive of 15% of Adult Monthly Pass, and have one minimum purchase quantity only.

Transfers	
<p>Transfers are requested when paying fares by cash or when using multi-ride cards. They are valid for the first available bus travelling in the direction of the destination and are not transferrable. A daycare transfer can also be requested providing parents the ability to drop off their children at a daycare without having to pay a second fare to board the bus. Approximately 500,000 transfers are requested per year.</p>	
<p><u>Issues:</u> A passenger who wishes to stop along their trip to do errands cannot do so with the current system. Due to the frequency of some routes, transfers are at times no longer valid for a connecting trip.</p>	<p><u>Opportunity:</u> By extending the Transfer policy to 90 minutes, and removing the direction of travel restrictions, an additional incentive is provided as it allows a user to make errands without being penalized by paying the fare a second time to continue their trip.</p>
Support Person Assistance Card	
<p>A photo identification card that identifies the card holder as a person who, because of a disability, needs to be accompanied by a support person. Upon payment of their fare, a card holder permits one support person to travel at no additional cost. The card can be obtained through an application process.</p>	
<p><u>Issues:</u> Many do not understand the policy and therefore do not take advantage of the support card.</p>	<p><u>Opportunities:</u> Better communication strategies should be undertaken to promote the use of the Support Card which may encourage more people to take the Conventional system instead of the Handi Transit Services.</p>
Fare Media and Vendors	
<p>Cards and passes can be purchased with photo identification at the Downtown Transit Centre (Kiosk). Passes are also available at all Citizen Service Centres, Public Libraries, and a number of retail locations across the City. The cost of a photo identification card is \$6. Adult cards are issued IDs without an expiry date; Students are issued ID's with a four (4) year expiry from date of purchase but must also provide proof of enrollment each year; all other Targeted Groups receive an ID card that expires every four years. The photo ID card is required with the current fare structure to provide proof of eligibility for Targeted Discounts. Retail locations selling passes do so under a vendor agreement, and receive 1% of the purchase of fare for re-sale to the public (Approximately \$10,000 annual cost).</p>	
<p><u>Issues:</u> All passengers must provide an ID card to receive a discount. An individual must go to a location where passes are being sold to buy tickets and passes which are discounted – otherwise a cash fare must</p>	<p><u>Opportunity:</u> Smart card technology would provide the ability for a person to pre-load their cards in the comfort of their home which would be more convenient and increase ridership</p>

<p>be paid to access the service. There is a cost associated with administration of photo IDs, and fare media points of sale.</p>	<p>opportunities. Photo ID's would not be necessary if everyone received the same discount and would eliminate the need to provide proof of eligibility.</p>
<p><b>Universal Bus Pass (U-Pass)</b></p>	
<p>In 2017, approximately 6500 full time students participated by contributing \$190 to the U-Pass program, which provides access to transit services for 8 months of the year, with a total revenue of \$1,235,000. Of those who contributed, 4200 cards were used at least once. Based on this usage, an average of 750 students used their card more than 30 times in a month (equal to a monthly pass use), 350 used the card between 10-29 times a month (equal to a multi-ride card use) and the remainder used it less than 10 times a month (equal to a cash use).</p>	
<p><u>Issues:</u> At the onset of the U-Pass in 2006, additional service was provided to Laurentian Students with the intent of reaching a revenue neutral agreement. This service has since been reviewed through the Transit Action Plan, and modified to meet the needs of not only the students but the community as a whole. The low number of card use indicates that the program is heavily subsidized by students. If the U-Pass is discontinued, the loss of revenue is estimated at \$560,000. This loss of revenue would need to be recovered through common subsidies.</p>	<p><u>Opportunity:</u> Only full time Laurentian students who use the service are receiving a benefit through the U-Pass. The student market from all secondary and post-secondary institutions should instead be the focus, whereas a steep discount is provided to all students within the City, twelve (12) months of the year. This would meet the goal of an Affordable Transit Fare Strategy, whereby a subsidy is provided in a consistent and equitable structure, with the intent of increasing ridership. Currently, Laurentian Students are paying \$518/year towards Transit passes in a twelve month period, and all other students in the City, including High-School and Post-Secondary students are paying \$984/yr.</p>

## Other Programs and Discounts

Further to the Miscellaneous User Fee By-Law, several programs and discounts have been approved throughout the years with the intent of providing a community benefit and promote transit use.

Youth Passes Program	
The youth transit pass program more commonly known as "Ride the Bus on Us" permits an annual allocation of \$25,000 of five ride cards to be distributed to youth in the community ages 12 to 24. The goal of the program is designed to encourage young people to take part in community programs and to familiarize themselves with the public transit system with the hope that they will see benefits to using transit in the future.	
<u>Issue:</u> The impact of this subsidy on ridership growth or community benefit is not known, as there are no monitoring mechanisms in place.	<u>Opportunity:</u> Create new programs which will aim to increase Transit use, and promote the service in the Community. Monitor the programs on an annual basis, to ensure the intended goal is being met.
Community Groups Program	
A \$30,000 annual allocation is available to facilitate transportation opportunities for not-for-profit programs and events. The grant allocation is part of Transit's ridership growth funding from the Provincial Gas Tax. In 2016, Council approved an application process which had as a goal to provide equity in the distribution of the grants to community groups, by issuing a cap of \$500 per applicant.	
<u>Issues:</u> Although providing some benefit to the community the support provided does not address the goal of promoting and increasing transit use and supporting community events.	<u>Opportunities:</u> Create new programs which will aim to increase Transit use, and promote the service in the Community. Monitor the programs on an annual basis, to ensure the intended goal is being met.
Ontario Works Program	
People who are in receipt of Ontario Works benefits may receive funds for transportation costs under certain circumstances. Under Ontario Works Directive 7.2 Health Benefits, transportation costs for medical treatment are paid when the costs exceed \$15 in a given month. A monthly payment equivalent to a monthly bus pass can be issued if the participant is required to attend on-going appointments for medical or health related purposes. Under Ontario Works Directive 7.4 Employment and Participation Benefits, transportation costs can be provided to a participant who is beginning or changing employment, or participating in employment assistance activities as they progress toward sustainable employment. This may include seeking employment, going to school, or attending a training program. Funds up to the amount of a monthly bus pass are issued directly to the participant and can be used for their preferred method of transportation such as a bus pass, bus tickets, gas, or taxi fare. On an annual basis, the Social Services Department purchases approximately \$80,000 worth of passes to distribute under the Ontario Works Program.	

<b>Affordable Transit Pass</b>	
<p>During budget deliberations in 2016, Council approved a permanent budget option of \$59,000 for an affordable bus pass program. This program provides a 50% discount on an Adult 31 Day Transit Pass to workers between the ages of 18 and 64 who are living with a low income and do not receive any other subsidies (Students do not qualify). Low income passes are available on a first come first serve basis up to 1425 passes per year. This program is administered by the Social Services Division. The uptake on the program for the first year was minimal. The Social Services Division made improvements to the program in the Fall of 2017 by changing the approval period from monthly to quarterly, providing support to those with incomplete applications, and by increasing promotion of the program.</p>	
<p><u>Issues:</u> Since the implementation of these changes (6 months), an increase in application occurred and 40 applicants are on a waiting list. The demand for financial assistance based on income indicates that there is a gap in the system for adults who work but do not qualify for Greater Sudbury Transit's targeted group discounts. Although successful, the program itself requires a considerable amount of administration, is at times difficult for individuals to complete the application, and there are no measures in place to verify if the applicant is receiving other transportation subsidies.</p>	<p><u>Opportunity:</u> The intent of the program addresses a gap in the system. There are administrative barriers and the system requires an individual to apply for a subsidy. Providing a lower monthly pass for all users would be more equitable and address the needs of all low-income individuals without requiring to apply for the subsidy. A lower monthly pass, if deeply discounted, will also increase ridership.</p>
<b>New Year's Eve and Canada Day Charters</b>	
<p>The City offers other ridership programs such as free public transit on New Year's Eve and \$1.00 fares for Canada Day celebrations. Cost of these additional charter hours are approximately \$5000.00 and the programs bring value to the community. These are successful programs that promote the use of transit and ensures everyone has a safe ride home.</p>	
<b>Community Agency Discounts</b>	
<p>Agencies supporting vulnerable population and school board related programs have been historically allowed to purchase 1 Ride cards at the Multi-Ride Ticket unit price, discount of approximately 40%. When ride cards were printed in a booklet format, the agencies would buy the booklet and distribute the tickets to their clients one at a time. When the booklet was discontinued, the 1 Ride Card was created to accommodate these agencies. Approximately 80,000 1 ride cards are sold and used annually to various organizations at a rate of \$2.60, instead of \$3.30.</p>	
<p><u>Issues:</u> The \$0.70 discounted price translates to an annual revenue loss of \$55,000. This historical subsidy is not currently being monitored or included in financial forecasts, nor is it outlined in the Miscellaneous User Fee By-Law.</p>	<p><u>Opportunity:</u> As 1 Ride Cards will be discontinued, these groups will be required to purchase the multi-ride cards.</p>

Veterans	
In 2006, Veteran members of the War Pensioners of Canada were granted 1-year worth of monthly passes as a result of "Year of the Veteran". Since then, the program expanded to include war veterans from WWII or the Korean War that were not members of the War Pensioners of Canada. At present, there are 21 people receiving free passes.	
<u>Issues:</u> This program has not been officially approved by Council and therefore this has not been advertised. War Veterans of Canada pensioners are currently receiving a concession fare, and therefore this program should be discontinued.	<u>Opportunity:</u> The same 21 members have been receiving the passes for over 10 years. Grandfather the list, and point new veterans to the concession fare through proper advertising of the fare structure.

### Summary of Fee Structure Changes:

In summary, the following opportunities to improve the current fare structure have been identified through the analysis.

**Achieving Goals and Objectives:** Any fare discount offered to groups or individuals should be outlined in the Miscellaneous User Fee By-Law which would then be monitored and reported to Council in a strategic manner. Although the historical approach of raising fees 3% every year is necessary to meet inflation and increasing costs of providing Transit Services, the fee increases could instead be tailored to meet a specific Council goal and achieve the revenue result required to meet operational requirements.

**Affordability:** As Transit Service is subsidized for the individual user, and the cost to use Transit compared to an automobile is cost effective, the current fare system could be said to be affordable. However, there are inequities in the discounts as stated above, and other than the affordable pass program, there is no subsidy for low-income adults. An overall affordable strategy should instead focus on being equitable and affordable for all, or to address specific strategic goals as set by Council.

**Easy to Understand:** The current fare structure is complicated and should be easy to understand. The various types of cards offered for groups should be combined to reduce administrative costs and time. It would also be easier to communicate a simple fare structure to Transit customers.

**Means Testing:** Low-income earners could benefit from the Affordable Transit Pass Program, but it is a challenge to identify revenue impacts this early in the program's implementation and the application process can be administratively onerous for both the applicant and the support staff reviewing the application. There is currently a waiting list and it is expected to grow as this program is still in the early stages. An



overall strategy should instead focus on offering fares that are discounted for all customers in order to remove financial barriers without requiring to identify the need.

**Fare Technology:** With Public Transit Infrastructure Funding available, the replacement of the fare collection system will allow for the upfront capital cost of replacement fareboxes with smart card technology, and should prove to enhance Transit Services and monitoring of fee strategies approved by Council. The initial cost of implementing smart card technology is valued at approximately \$500,000-\$600,000.

## **Proposed Affordable Fare Structure Recommendations**

Three Affordable Transit Fare Structure Options are being presented in this report. Based on best practice, and to meet as many principles for the development of affordable fee structures while also meeting Council priorities, each of the Options have been carefully selected to meet the following proposed Policy Framework.

### Proposed Affordable Transit Fare Policy Statement

Greater Sudbury Transit's Affordable Fare Policy is based on these guiding principles:

- Rewards frequent transit customers;
- Equitable in its offering of discounts;
- Encourages ridership; and
- Easy to implement, comprehend, and operate.

### Proposed Greater Sudbury Transit's Affordable Fare Policy Goal:

- This fare policy supports a mission of providing high-quality and accessible public transportation services for the benefit of the individuals and the community that it serves.
- The fare structure shall apply to the Family of Services provided by Greater Sudbury Transit, which includes Conventional, Transcab and Handi Transit Services.
- The fare structure contributes to and supports ridership growth strategies that result in net new ridership and revenue, and provides a social good.
- The fare structure applies equally to all fare concessions, recognizing the need to meet business objectives and meeting affordable access to transit services.
- The City will refer to this policy when making decisions about adjusting fares and fare structure changes. All such decisions will be made in consultation with Council.

### Proposed Fare Categories

- All Targeted Groups will receive equal discounts and be categorized under a concession fare. Targeted Groups consist of Students, Seniors, Disability Pensioners and Youths. The following definitions will apply to targeted groups:

- "Student" means a person who presents a current and valid student identification card from a high school or post-secondary educational institution;
  - "Youth" means a person who is between the ages of 5 and 12;
  - "Senior" means a person who is 65 years of age or older;
  - "Disability Pensioner" means a person who is a recipient of a the Ontario Disability Support Program (O.D.S.P), Assistance for Children with Severe Disabilities (A.C.S.D), Canada Pension Plan Disability (C.P.P.D), Veteran's Disability Pension or Canadian Institute for the Blind (C.N.I.B).
- Base cash fare will apply to all those accessing Transit Services. Concession fare discounts do not apply.
- Only 6 Ride Cards will be available. The discount will be based on a buy 5 (five) rides, get 1 (one) free and/or concession fare priced at 15% discount from the adult ride card fare.
- Monthly passes will be valid for 31 days from date of activation. The Monthly pass will be priced between 16-25 rides of the cash fare.
- The Adult monthly pass will be transferable and will not require a Photo ID. Concession priced passes are not transferrable and would require a photo ID.
- The Day Pass offers unlimited travel for 1 service day to up to 2 adults and 3 children. Concession discounts do not apply.
- The Employer Pass program offers an adult pass at a 15% discount when purchased in bulk. A minimum commitment of 50 passes over a period of 6 consecutive months is required from one employer. The passes can be distributed through a payroll deduction program administered by the Employer.
- A transfer will be offered with payment of cash or multi-ride fare, with the ability to return via the same bus route or continue travel on another connecting bus within 90 minutes of the original boarding.
- A Support Person Assistance Card is available to persons who require assistance while travelling on Conventional Services through an application process. The Card belongs to the cardholder and permits one support person to travel free of charge. An eligible Handi Transit passenger does not need to apply for the card.
- Photo identification can be purchased at the Downtown Transit Centre (Kiosk) for a fee of \$6. The Photo ID is required to persons who purchase and use concession fare payments. Adult fares no longer require the identification as they are transferrable.
- Vendors receive a 1% discount on the purchase of fare media for re-sale to the public and must sign a vendor agreement.
- Handi Transit passes can be purchased on board a Handi Transit bus or through the Service Provider's office. Photo ID cards are not required. The Handi Transit pass is transferrable to the Conventional or TransCab services.

## **Proposed Supporting Ridership Growth Programs**

In an effort to promote transit use through grant allocations, the following initiatives will be supported with the \$55,000 total grant support funds in the existing budget (current programs "Ride the Bus on Us and "Community Events Grant Application" will be discontinued).

Travel Familiarization Classes (Travel Training): An annual allocation of \$10,000 will support the program. Travel training is a program that equips people who are new to public transit with the knowledge and confidence to travel more independently. Group sessions are designed to provide a comfortable environment, and typically include in-class and on-the-road training components. This training method provides both a theoretical and practical foundation, which help to accommodate different learning styles and abilities. Examples of target groups more often inclined to use the public transit system after receiving Travel Training are older adults, people with disabilities, newcomers, and school age students (Grade 7-10). In order to give participants an incentive to try the service, 5 ride cards can be provided once they have attended the session. These cards can in turn be tracked through the fare box system, to measure the success of the program. Further, a free Photo ID will be issued on site at free of charge (value \$6).

A typical class would consist of no more than 25 participants. The cost of a 5 ride card is currently \$12.5. Under the supervision of the Supervisor of Handi Transit and Driver Certification Program, Transit Operators will be trained as Travel Training Ambassadors and provide support during the Travel Familiarization Class. It is estimated that the operating cost of a class will be approximately \$300.00. Each class will be tracked, with number of participants and a report will be provided to Council to assess the success and extension of the program each year.

Transit Use Promotional Opportunities: Greater Sudbury Transit has received requests from various community members looking to partner and promote transit use through an initiative or community event. The types of requests received are geared to encourage non-users to try transit, and create opportunities for free promotional and marketing exposures.

This program will allow Greater Sudbury Transit services to partner with community members who share the same objective – promote transit use. These "win-win" arrangements can heighten exposure, deliver added value to customers and service a greater social purpose. The following partnerships will be eligible:

- Free access to Transit Services for a group to participate in a not-for-profit or school board related event or initiative. The group will be given free access to Greater Sudbury Transit services by provision of a letter from the Director of Transit Services.
- Cost sharing opportunity for access to a Community Event with for profit organizations. A "Ride the Bus for \$1" tag will be used in promoting the use of Transit to an event. An individual would require to pay \$1 to access Transit

Services to reach the event; the organization would be billed \$1 and the City will subsidize through this grant \$1. In exchange for the support, the organizer must provide proof of advertisement (social media, radio, posters or any other means of publicity approved by the Director of Transit). Greater Sudbury Transit will track the number of participants through the fare box, and then invoice the company for their share.

All programs will be monitored and reported to Council to assess the success and extension of the program each year. Modification and extensions will be proposed to ensure that the grant opportunities are meeting Council goals.

## Assumptions of Transit Affordable Fare Structures Options:

2018 Fare Structure is the baseline: To compare the increase in fare of each category, the 2018 Transit Fare Structure under the Miscellaneous User Fee By-Law has been used.

2018 Fare Structure	Cash	5 Ride	10 Ride	31 Day	Other
Adult	\$ 3.30	\$ 13.00	\$ 26.00	\$ 90.00	
Student	\$ 3.30	\$ 13.00	\$ 26.00	\$ 82.00	
Seniors	\$ 2.40	\$ 10.00	\$ 20.00	\$ 54.00	
Disability Pensioners	\$ 2.40	\$ 10.00	\$ 20.00	\$ 54.00	
Children	\$ 2.40	\$ 10.00	\$ 20.00	\$ 54.00	
Day Pass					\$ 10.00
Family Pass					\$ 16.00
Laurentian Upass					\$ 190.00

2017 Units Sold Data: Based on the number of units sold in 2017 per category, the following table provides the unit counts used to calculate forecast revenues. Actual U-Pass card use has been added to the totals, as the U-Pass is under these assumptions being discontinued. Further, as only 6 Ride Cards will be offered, a 10 ride card was calculated as a 5 ride card, and the 5 ride card units sold remained the same.

<b>Cash and 1 Ride Cards</b>	601095
<b>5 Ride Card Adult</b>	132026
<b>5 Ride Card Other</b>	40366
<b>Day Pass</b>	1472
<b>Monthly Adult</b>	10810
<b>Monthly Student</b>	18009
<b>Monthly Other</b>	11926

Handi Transit annual fee revenues total approximately \$220,000. As the clientele mostly falls within the Targeted Groups, which other than Students will not be impacted by the proposed fee structure changes, the Handi Transit Ridership information and forecast is not be included in these estimates.

It is also important to highlight that in order to more accurately assess potential impacts on ridership and provide a detailed analysis on impacts to revenue, a price elasticity test would be required. Elasticity tests however would not include service related improvements which will be realized with the implementation of the Transit Action Plan recommendations. With the changes to the overall structure of how Transit Services are provided to the City of Greater Sudbury, it is a challenge to accurately predict the impact to ridership and revenues.

Each of the Options were reassessed through the 10 principles of affordable access. Option 1 meets the most principles, with Option 2 & 3 closing the gap on several issues by providing additional opportunities that are not currently being addressed through the current structure. The table below provides a summary of the principles being achieved with each option.

The City will use the following principles when developing strategies for affordable access to recreation and transit	Principle Achieved?				How the principle is being met with the Proposed Options
	Current	Option 1	Option 1	Option 2	
Availability of universal, free programs and services to children, youth, seniors, individuals and families.	Somewhat	Yes	Somewhat	Somewhat	Discounts provided through Targeted groups are better aligned, and provide options for all individuals in varying degrees.
Where program subsidies are implemented, the City will utilize the (LICO/LIM) means testing to determine eligibility.	Somewhat	No	No	No	The practice of means testing for fare subsidy creates an administrative pressure and is difficult to monitor. Instead of providing an Affordable Transit Pass based on LICO/LIM all passengers should receive affordable options to transit access through the fee structure.
Programs will contribute to maximizing use of underutilized facilities, programs and services.	No	Yes	Somewhat	Somewhat	As the first option would not require proof of eligibility, the Monthly Pass could be transferrable. For Options 2 & 3, only the Adult Monthly pass could be transferrable. Typically, these passes are used for commuting to and from work, therefore the use of the pass transferred to a family member would occur during off peak.
Subsidy programs will not stigmatize individuals participating.	No	Yes	No	No	Option 1 would eliminate the need to carry a Photo ID and provide proof of eligibility to receive discount.
The City will develop public promotions to better inform residents regarding universal and program subsidies.	Somewhat	Yes	Yes	Yes	Simpler Fare Structures will be easier to promote. Efforts to promote a new Affordable Fare Structure would be undertaken should an option be approved.
Services will be responsive to the City's Diversity Policy and the Accessibility for Ontarians with Disabilities Act.	Yes	Yes	Yes	Yes	Services are responsive in all fare structures.
The City will engage and collaborate with community partners to develop, enhance and promote policies and affordable programs.	Somewhat	Yes	Yes	Yes	These options address the Stakeholder and Community priorities shared through the Transit Action Plan Engagement Process
Programs initiated will be sustainable.	Yes	No	No	No	All Options would require additional subsidizing from the tax levy, although these would also increase ridership and therefore some of the loss has a potential of being recovered through Provincial Gas Tax.
Affordable programs will be monitored upon implementation for the purposes of reporting and exploring opportunities to build on success, value for money.	Somewhat	Yes	Yes	Yes	With a simplified fare structure, it would be easier to monitor revenues and riderships based on the categories selected with appropriate discounts.
Performance standards and program review will ensure success.	No	Yes	Yes	Yes	On an ongoing basis, fare reviews will take place prior to budget deliberations. Fare increases should be supplemented by an increase in service level where feasible.

## Option 1 – Universal Fee Structure

Four Categories only		Fee	# units sold	Forecasted Revenue
Cash		\$ 3.50	601095	\$ 2,103,832.50
Day Pass	4 Rides	\$ 14.00	1472	\$ 20,608.00
6 Ride Card	5 Rides	\$ 17.50	172392	\$ 3,016,860.00
31 Day Pass	16 Rides	\$ 54.00	40745	\$ 2,200,230.00

<b>Forecasted Revenues</b>	<b>\$ 7,341,530.50</b>
<b>2018 Budget Revenue Forecast</b>	<b>\$ 7,910,000.00</b>
<b>Difference</b>	<b>\$ (568,469.50)</b>

Adult	Student	Target Groups
\$ 0.20	\$ 0.20	\$ 1.10
Cost of 4 rides for up to 2 adults, 3 children		
\$ 1.20	\$ 1.20	\$ 5.10
\$ (36.00)	\$ (28.00)	\$ -

\* This table represents the difference between the 2018 fee and the proposed Option Fee

**Goal:** Provide affordable access to transit services for all residents of Greater Sudbury through a Universal Fee Structure.

### Benefits:

- All residents are treated the same, in a fair and equitable structure that is affordable.
- Only four categories, easy to implement and easy to understand.
- Monthly pass is valued at sixteen (16) rides and all other rides during the 31-day period are free. No one pays more for the monthly pass than current rates. Adults pay \$36.00 less, Students pay \$28.00 less and all other groups pay the same (no increase).
- As significant fare decrease changes travel behavior, it is expected that ridership will increase for adults and students, and less cash fares and ride cards will be purchased. Ridership increases may result in an increase in Provincial Gas Tax allocation.
- Along with the service improvements proposed by the Transit Action Plan, this Affordable Fare Structure could attract a new ridership base.
- With no requirements for identification, there would be a decrease in administrative cost which would also reduce the overall forecasted revenue loss.
- The elimination of the U-Pass will mean that approximately 5500 students will save \$200 a year, as they will not be subsidizing others to use the service.
- Approximately 1000 Laurentian Students will be paying \$130.00/yr more, however all other students in the City will be paying \$336 less.

### Gaps:

- Revenue loss estimated at \$570,000 which is a 0.2% tax levy increase.
- Cash fares are \$0.20 more for Adults and Students, and \$1.10 more for all other Target Groups. 6 Ride cards are \$1.20 more for Adults and Students, and \$5.10 more for all other Target Groups. For those who are price sensitive, the 31 Day Card will be available.

## Option 2 – Affordable Transit Fare Structure with Adult and Concession Fares

Six Categories	Discount	Cash	# units sold	Revenue Cash
Cash	-	\$ 3.50	601095	\$ 2,103,832.50
Day Pass	-	\$ 14.00	1472	\$ 20,608.00
6 Ride Card - Adult	5 Rides	\$ 17.50	132026	\$ 2,310,455.00
6 Ride Card - Concession	5 Rides +15%	\$ 14.90	40366	\$ 601,453.40
31 Day Pass - Adult	20 rides	\$ 70.00	10810	\$ 756,700.00
31 Day Pass - Concession	16 rides	\$ 54.00	29935	\$ 1,616,490.00

<b>Forecasted Revenues</b>	<b>\$ 7,409,538.90</b>
<b>2018 Budget Revenue Forecast</b>	<b>\$ 7,910,000.00</b>
<b>Difference</b>	<b>\$ (500,461.10)</b>

Adult	Student	Target Groups
\$ 0.20	\$ 0.20	\$ 1.10
Cost of 4 rides for up to 2 adults, 3 children		
\$ 1.20		
	\$ (1.40)	\$ 2.50
\$ (20.00)		
	\$ (28.00)	\$ -

\* This table represents the difference between the 2018 fee and the proposed Option Fee

**Goal:** Provide affordable access to transit services for Targeted Groups, with an additional discount to the Adult Monthly pass to close the financial barrier gap for low-income adults.

### Benefits:

- Only six categories, easier to implement and easier to understand.
- No one pays more for the monthly pass than current rates. Adults pay \$20.00 less, Students pay \$28.00 less and all other groups pay the same (no increase).
- Monthly pass is sixteen (20) rides of cash value and all other rides during the 31-day period are free.
- As significant fare decrease changes travel behavior, it is expected that ridership will increase for adults and students, and less cash fares and ride cards will be purchased. Ridership increases may result in an increase in Provincial Gas Tax allocation.
- Along with the service improvements proposed by the Transit Action Plan, this Affordable Fare Structure will attract a new ridership base.
- With no requirements for identification, there would be a decrease in administrative cost which would also reduce the overall forecasted revenue loss.
- The elimination of the U-Pass will mean that approximately 5500 students will save \$200 a year, as they will not be subsidizing others to use the service.
- Approximately 1000 Laurentian Students will be paying \$130.00/yr more, however all other students in the City will be paying \$336 less.

### Gaps:

- Revenue loss estimated at \$500,000 which is a 0.2% tax levy increase.
- Cash fares are \$0.20 more for Adults and Students, and \$1.10 more for all other Target Groups. 6 Ride cards are \$1.20 more for Adults, \$1.40 less for Students (benefit), and \$2.50 more for all other Target Groups. For those who are price sensitive, the 31 Day Card will be available.
- The concession pass would not be transferrable and Photo ID would be required.

### Option 3 – Affordable Transit Fare Structure with Adult and Concession Fares

Six Categories	Discount	Cash	# units sold	Revenue Cash
Cash	-	\$ 3.50	601095	\$ 2,103,832.50
Day Pass	-	\$ 14.00	1472	\$ 20,608.00
6 Ride Card - Adult		\$ 17.50	132026	\$ 2,310,455.00
6 Ride Card - Concession	5 Rides +15%	\$ 14.90	40366	\$ 601,453.40
31 Day Pass - Adult	25 rides	\$ 87.50	10810	\$ 945,875.00
31 Day Pass - Concession	16 rides	\$ 54.00	29935	\$ 1,616,490.00

<b>Forecasted Revenues</b>	<b>\$ 7,598,713.90</b>
<b>2018 Budget Revenue Forecast</b>	<b>\$ 7,910,000.00</b>
<b>Difference</b>	<b>\$ (311,286.10)</b>

Adult	Student	Target Groups
\$ 0.20	\$ 0.20	\$ 1.10
Cost of 4 rides for up to 2 adults, 3 children		
\$ 1.20		
	\$ (1.40)	\$ 2.50
\$ (2.50)		
	\$ (28.00)	\$ -

\* This table represents the difference between the 2018 fee and the proposed Option Fee

**Goal:** Provide affordable access to transit services for Targeted Groups including students, with a slight decrease in Adult monthly passes.

#### Benefits:

- Only six categories, easier to implement and easier to understand.
- No one pays more for the monthly pass than current rates. Adults pay \$2.50 less; Students pay \$28.00 less and all other groups pay the same (no increase).
- Monthly pass is sixteen (25) rides of cash value and all other rides during the 31-day period are free.
- As significant fare decrease changes travel behavior, it is expected that ridership will increase for students.
- Along with the service improvements proposed by the Transit Action Plan, this Affordable Fare Structure will attract a new student ridership base.
- With no requirements for identification, there would be a decrease in administrative cost which would also reduce the overall forecasted revenue loss.
- The elimination of the U-Pass will mean that approximately 5500 students will save \$200 a year, as they will not be subsidizing others to use the service.
- Approximately 1000 Laurentian Students will be paying \$130.00/yr more, however all other students in the City will be paying \$336 less.

#### Gaps:

- Revenue loss estimated at \$315,000 which is a 0.1% tax levy increase.
- This option does not close the financial barrier for low-income individuals to access Transit Services.
- Cash fares \$0.20 more for Adults and Students, and \$1.10 more for all other Target Groups. 6 Ride cards are \$1.20 more for Adults, \$1.40 less for Students (benefit), and \$2.50 more for all other Target Groups. For those who are price sensitive however, the 31 Day Card will be available.
- The concession pass would not be transferrable and Photo ID is required.



## Next Steps

If an Option is approved, a business case for an Affordable Transit Fee Structure will be developed for consideration in the 2019 budget.

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