

Fare Change Study Update

MTS Board of Directors

December 18, 2025

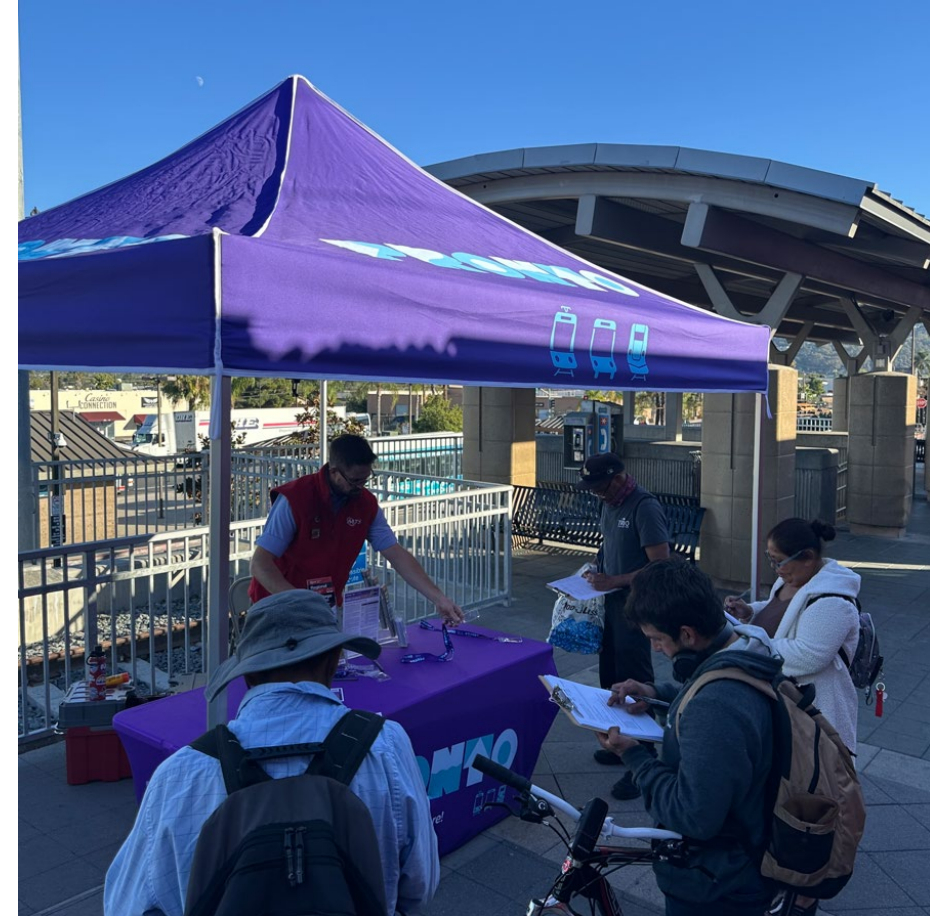
Fare Change Study Background

Part of a broader Financial Sustainability Strategy to extend the fiscal cliff beyond 2028

- Evaluating multiple options, all of which will return to the Board for consideration
- Exploring a potential revenue measure for the November 2028 ballot
- Adjusting service levels per Board Policy 42
- Shifting select non-essential capital funding to support operations
- Increasing non-fare revenue sources (e.g. advertising)

Fare Change Study Background

- MTS Board voted February 13, 2025, to work with SANDAG and NCTD on a fare change study
- Fares account for approximately 20% of MTS budget (~\$90 million annually) to help fund operations and service levels
- MTS periodically conducts fare changes to ensure prices align with current financial conditions, market demands and technology improvements



Recent Fare Changes

Moved toward a more simplified fare structure with introduction of **PRONTO**

2008

- Increased Trolley one-way fares
~\$1.50 - \$2.50
- Increased local bus one-way fares \$1.75 - \$2
- Eliminated free transfers
- Eliminated Trolley zone fare system in favor of flat fare

2009

- Increased Day Passes to \$5
- Increased Month Passes:
Adult:
\$68 - \$72
Senior:
\$17 - \$18
Youth:
\$34 - \$36

2019

- Eliminated multi-day Day Passes
- Increased Day Pass from \$5 to \$6
(first since 1997)

2020

- Adopted “best fare” functionality with fare capping
- Added unlimited 2-hour transfers
- Introduction of Senior and Youth Day Pass (\$3)
- Lowered Youth Month Pass from \$36 to \$23
- Increased Senior Month Pass from \$18 to \$23

Peer Fares (Adult)

	 (Portland)	 (Dallas)	 (Salt Lake City)	 (San Francisco)	 (Sacramento)	 (Denver)
Adult One-Way	\$2.80	\$3	\$2.50	\$3	\$2.50	\$2.75
Adult Day Pass	\$5.60	\$6	\$5	\$5.70	\$7	\$5.50
Adult Month Pass	\$100	\$126	\$85	\$86	\$100	\$88

Current MTS Fares



Adult One-Way	\$2.50	Senior/Disabled/Medicare One-Way	\$1.25	Youth	Free
Adult Day Pass	\$6	Senior/Disabled/Medicare Day Pass	\$3	<i>Pre-Youth Opportunity Pass fare was the same as Seniors</i>	
Adult Month Pass	\$72	Senior/Disabled/Medicare Month Pass	\$23		

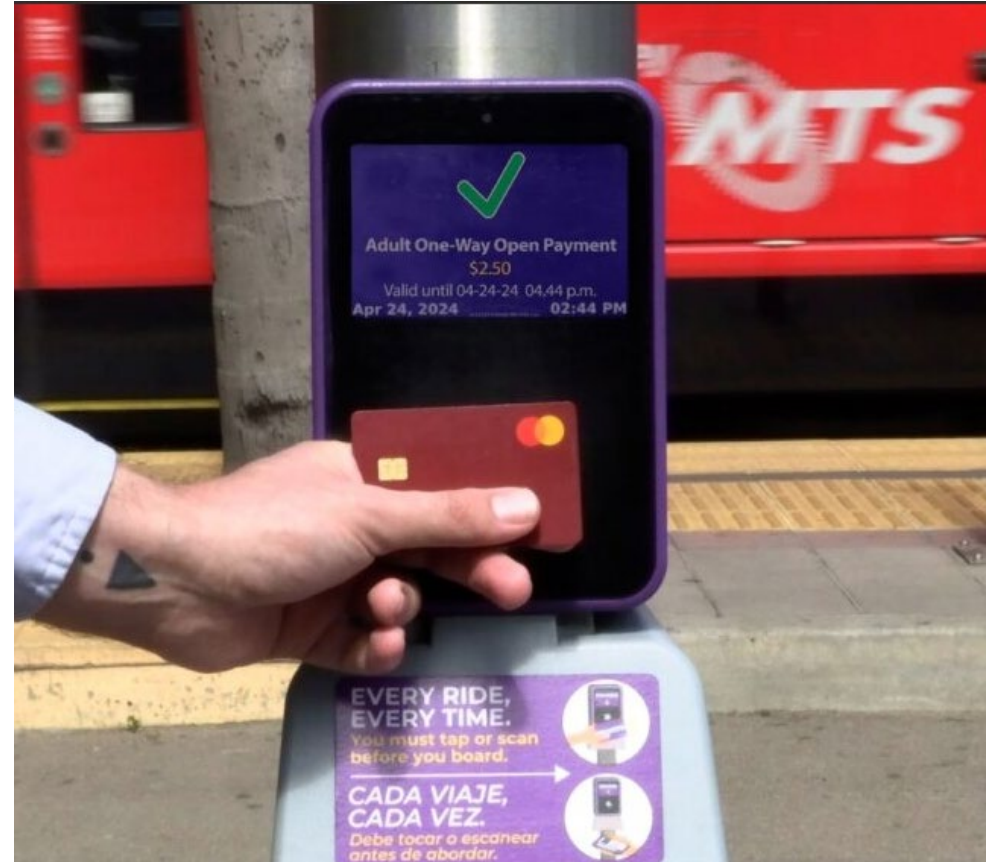
**Day and Month passes include NCTD bus and light rail services .
COASTER has separate fare structure*

Current MTS Fare Discounts/Promotions

PRONTO Extend	Free transit for those 18-24 years old previously in a foster care system	College Semester Pass	40% discount off Adult Monthly Pass
Family Weekends	Two children 12 and under ride free with paying adult on Sat/Sun	College Monthly Pass	20% discount off Adult Monthly Pass
Holiday Friends Ride Free	Free ride for a friend with a fare-paying customer on select holidays	Classroom Day Pass Program	\$1.50 for a Day Pass
Children 5 & Under Ride Free	Children 5 & Under Ride Free	Employer & Business Partner Program	10% - 25% discount off Adult Monthly Pass

Fare Change Study Process

1. Data collection
 - Current ridership and fare revenue, peer agency review
2. Development of fare change scenarios
3. MTS and NCTD Boards and SANDAG Transportation Committee discussion
4. Modeling and analysis
 - Estimated future ridership and fare revenue, Title VI
5. MTS and NCTD Boards will consider potential fare changes, may recommend approval
6. If there are recommended changes, Transportation Committee will be asked to consider and approve



Fare Change Study Timeline

OCT - NOV 2025		• MTS and NCTD survey riders to understand their priorities and how changing fares might affect them. • Research potential fare changes to see how much ridership and revenue would be impacted.
JAN - FEB 2026		• Staff propose options for changing fares and get feedback from transit agencies' Board of Directors • Gather more feedback from riders on fare change options at transit centers and public workshops
SPRING 2026		• Staff propose final fare change to Boards (community opportunity to make formal public comments) • MTS and NCTD's Boards of Directors, then SANDAG's Transportation Committee, vote on whether to recommend/approve proposed changes.
SUMMER/FALL 2026		• If approved, fare changes go into effect

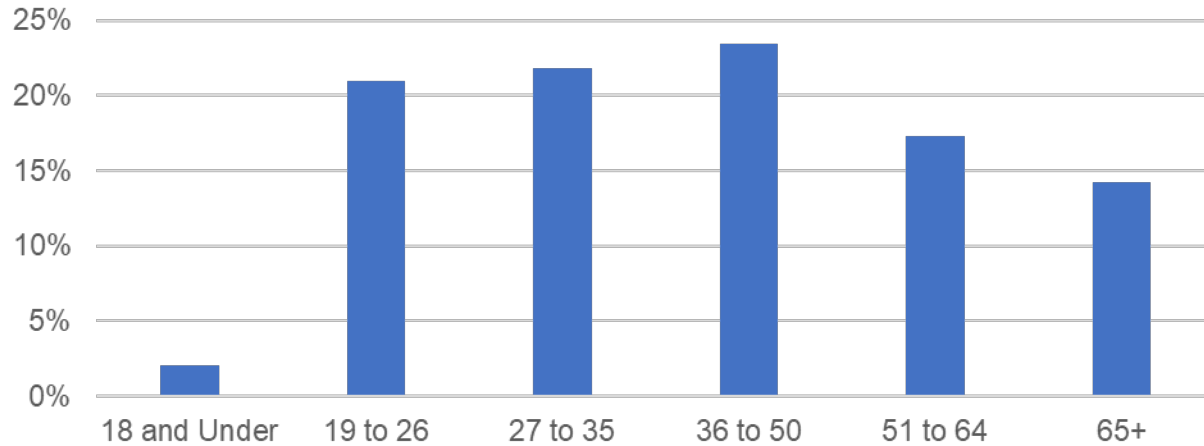
Fare Change Study Phase 1

- Survey available Oct. 6 – Nov. 7
- Online and paper versions available
- **Goals:** Educate about fare change process and understand public sentiment about service levels vs. cost to ride
- **Questions:** Which transit services people ride, how often they ride, rider demographics, rider priorities regarding fares, level of service, and discounts

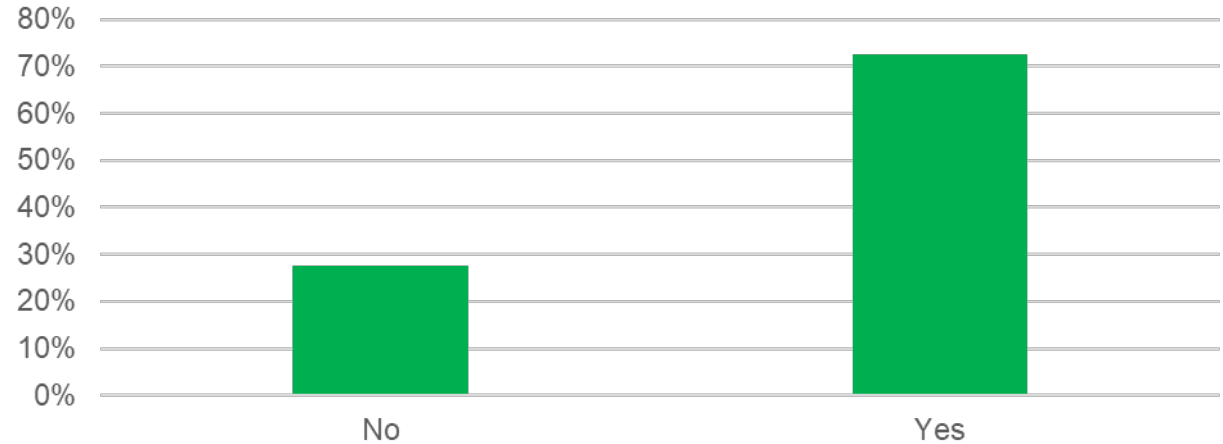


Fare Change Study Draft Survey Results

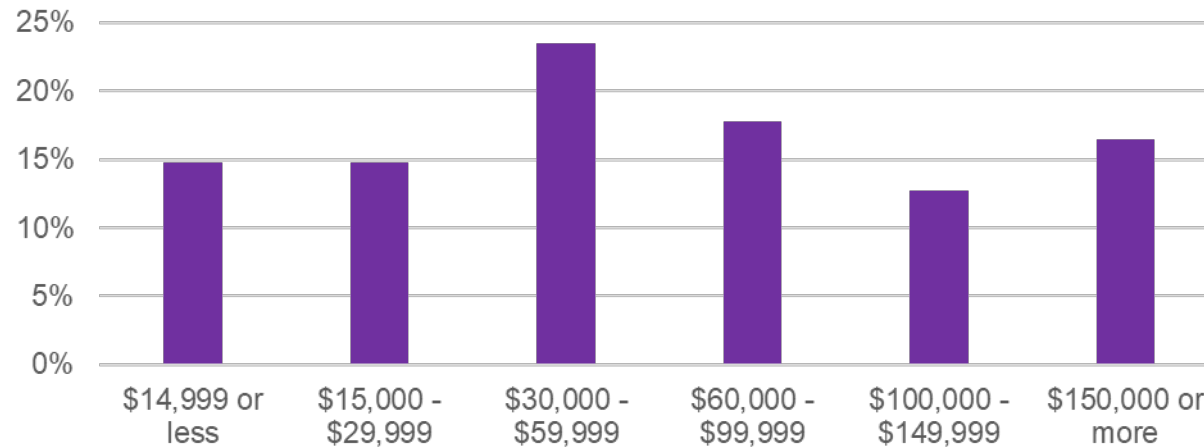
Age



Car-Light Households (Fewer Available Vehicles Than People)

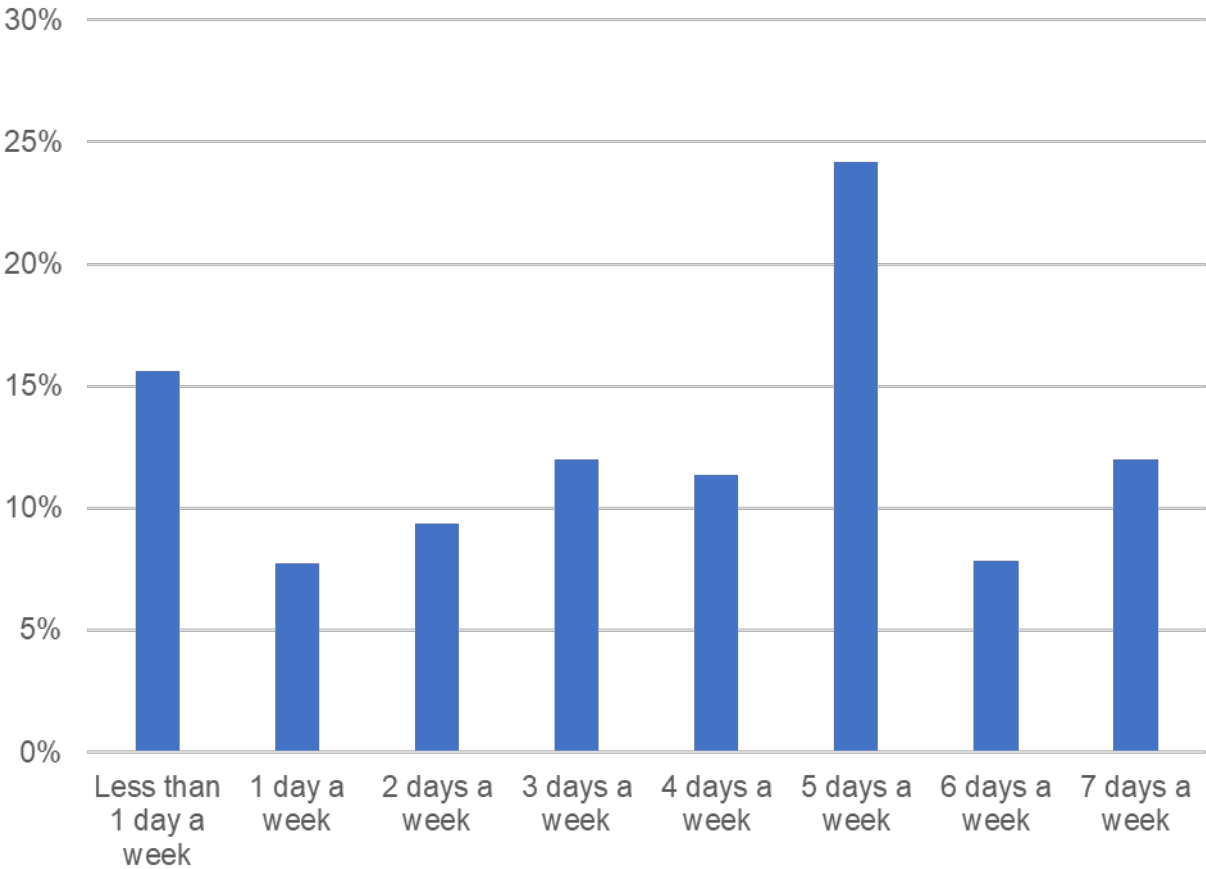


Annual Household Income

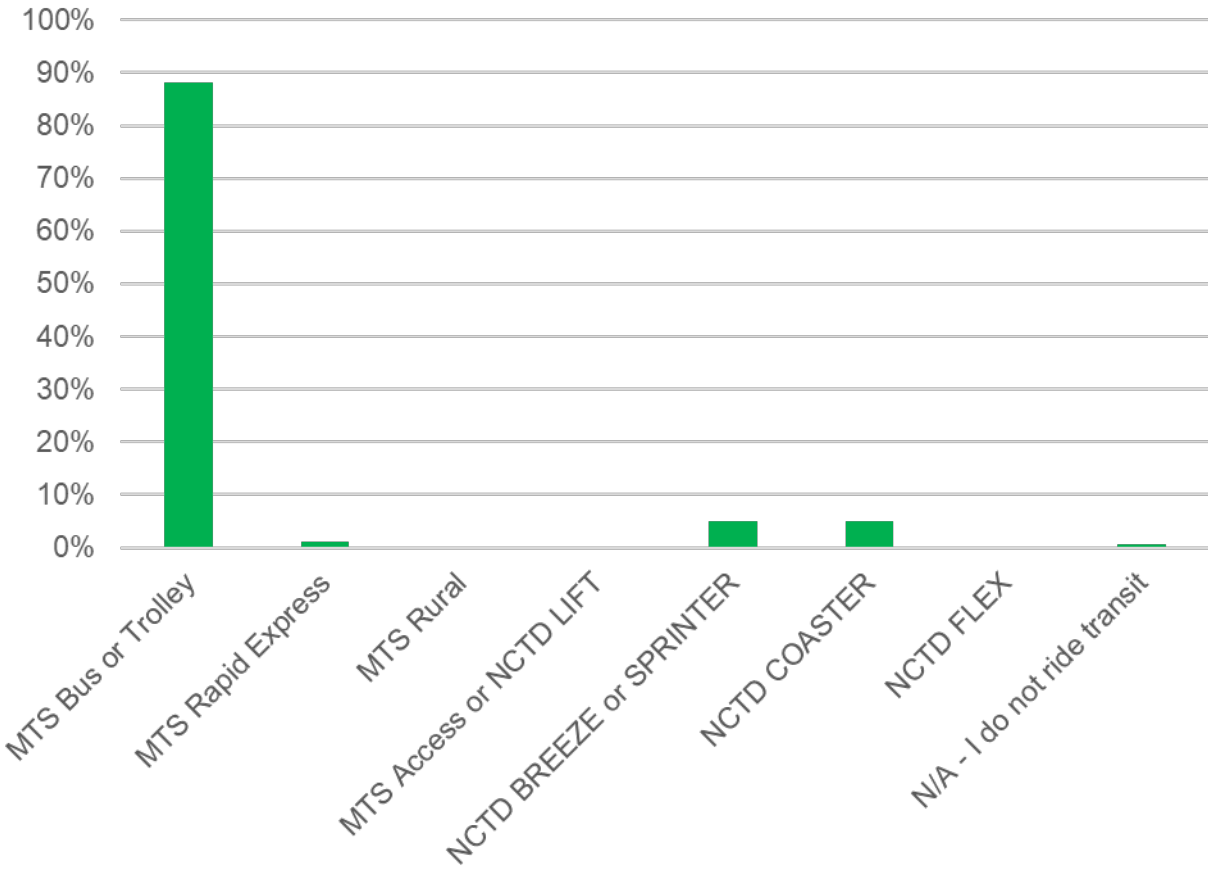


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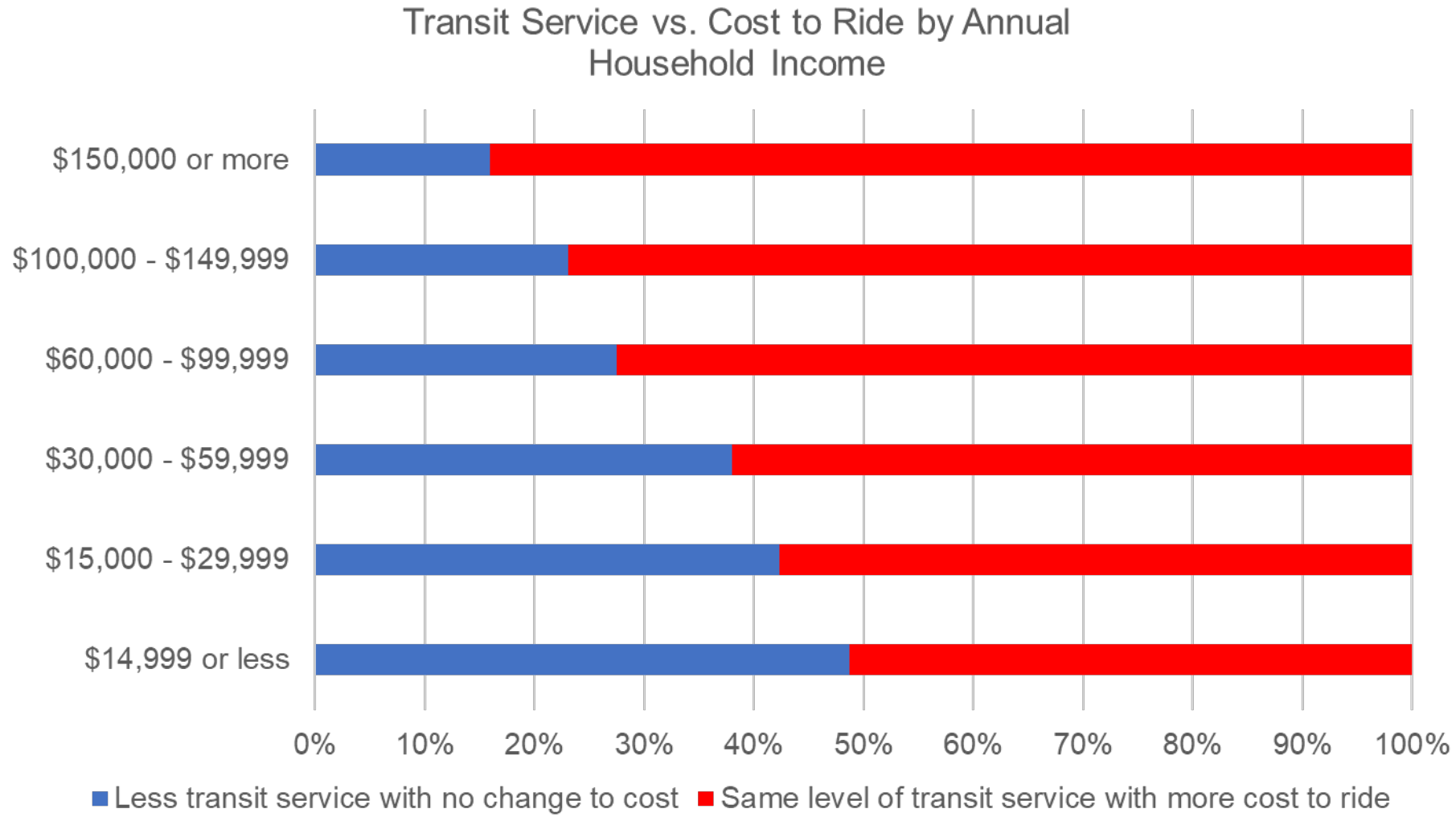
Frequency of Riding Transit



Most Frequent Transit Service

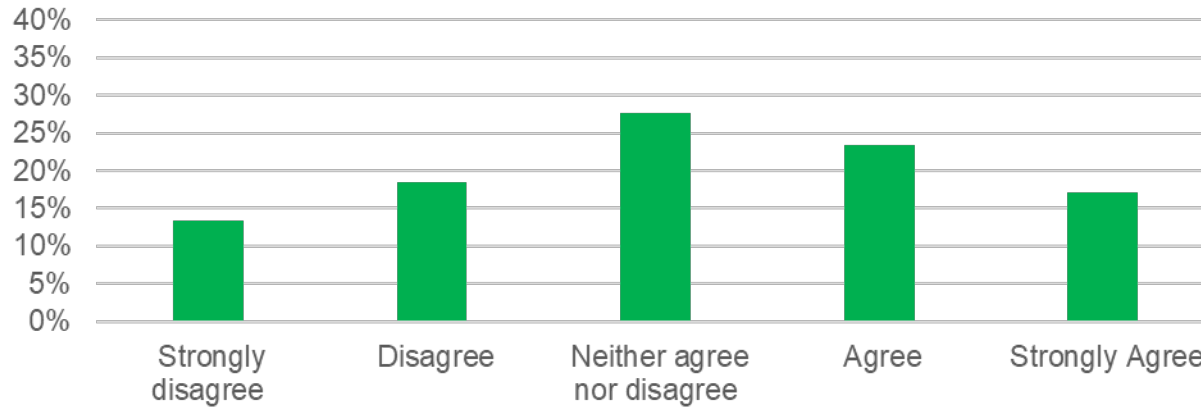


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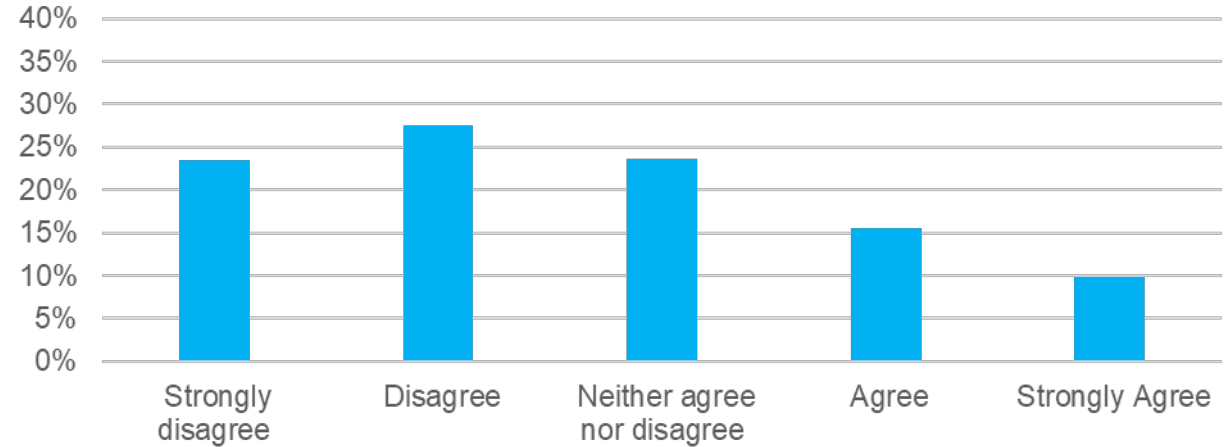


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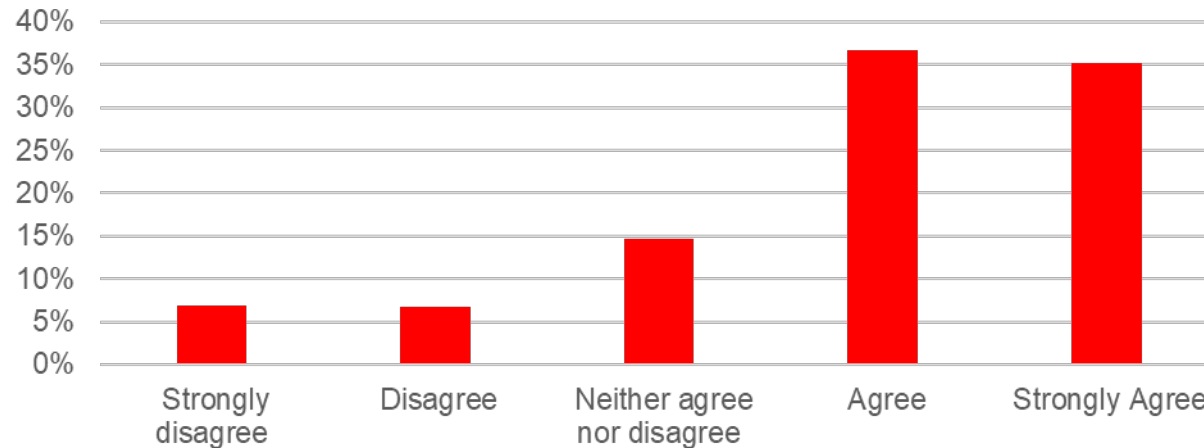
If Increasing Fares, Better to Increase One-Way and Day Passes



If Increasing Fares, Better to Increase Price of Monthly Passes

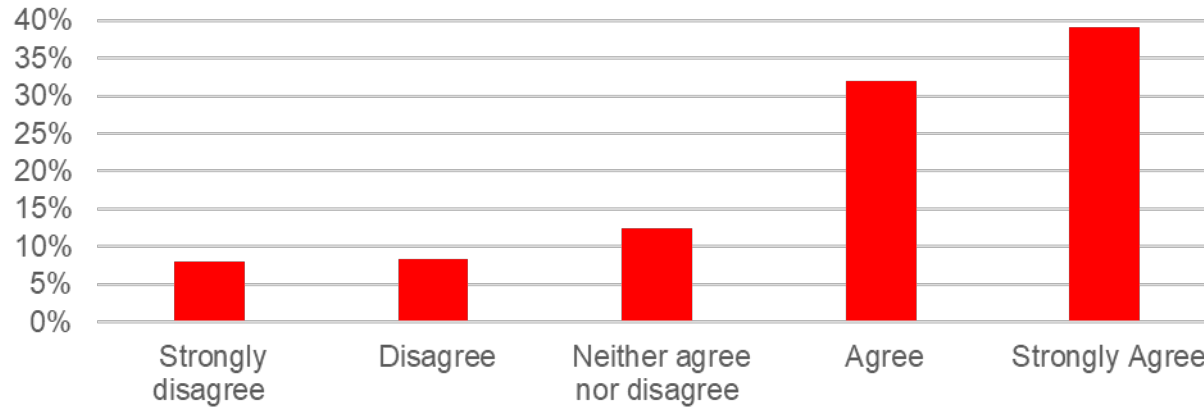


If Increasing Fares, Better Over Time Rather Than All At Once

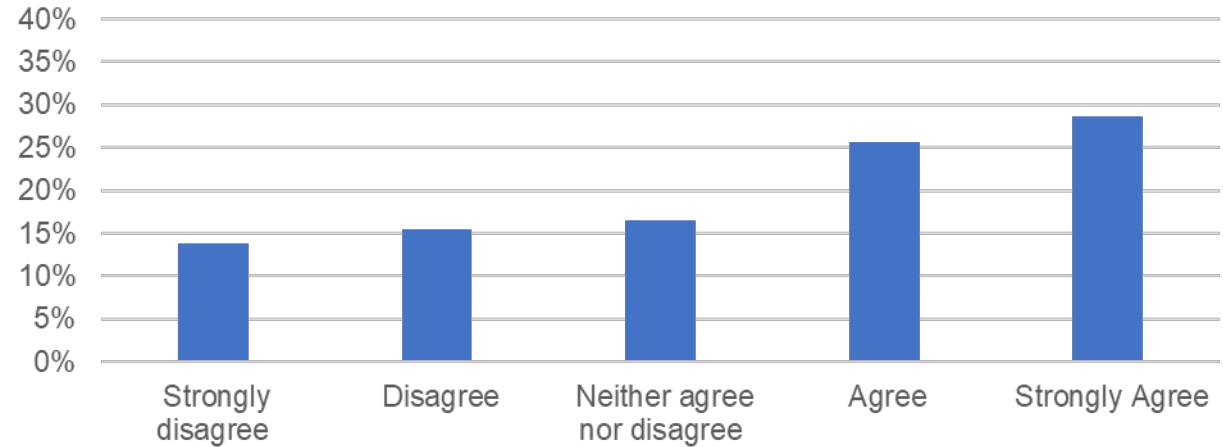


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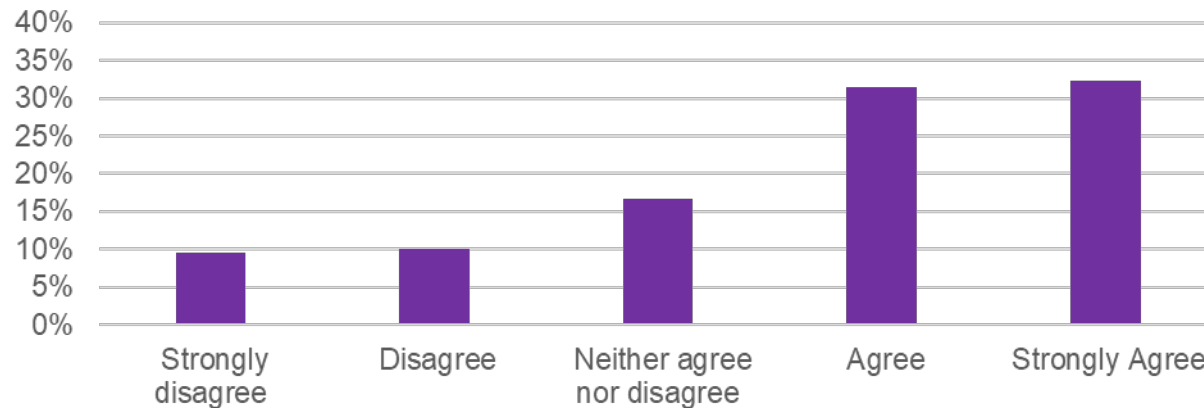
Keep Fares Same for Senior/Disabled/Medicare, Even if Others Pay More



Keep Youth Fares Free, Even if Others Pay More



Keep Fares Same for Low-Income Riders, Even if Others Pay More



Fare Change Next Steps

- Analyze public outreach results
- Begin running scenarios for fare changes
- Planning for Phase 2 Public Outreach (Feb-March)
 - Community workshops
 - Fare change scenario discussions



Thank you!

Questions?