



# Fare/Service Equity Analysis

*April 7, 2025*

To assess the equity of:

- A potential change to FAST's current fare structure
- A potential change to FAST's current fare media
- Potential changes to FAST's (5) lowest ridership fixed routes
- Potential changes to FAST's (3) lowest ridership holiday schedules



## Primary Tasks

1. Onboard Survey Results
2. Demographic and Socio-Economic Analysis\*
3. Fare Media Assessment
4. Fare Structure Analysis
5. Service Change and Route Modification Analysis

\* *Service Impact/Equity Analysis Using Demographic Data*

Targeted Sample Size: 420 Responses

**Actual Sample Size: 577 Responses\***

*\* **Note:** FAST exceeded the target by 37% demonstrating their commitment to ensuring the onboard survey effort was reflective of its current customer base.*

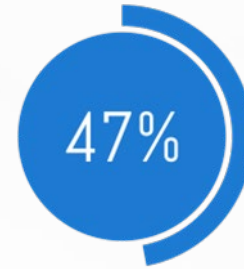




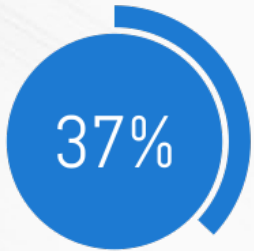
## Respondents: Fixed Route



Uses FAST services  
**Daily**



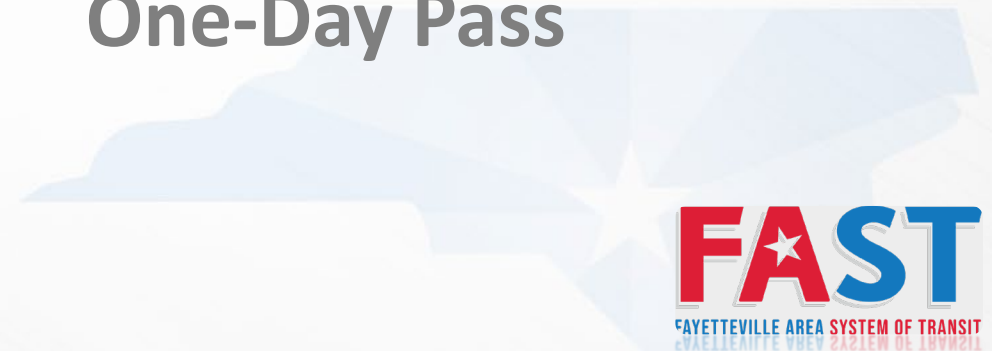
Purchases passes at the  
**FAST Transit Center**



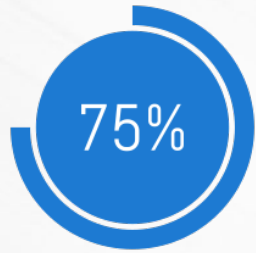
Primary Trip  
Purpose: **Work**



Primary Pass Type:  
**One-Day Pass**



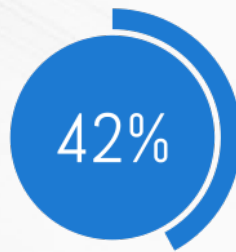
## Respondents: *FASTTrac!*



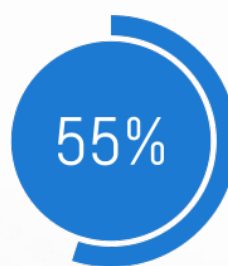
Uses FAST services  
**Weekly**



Purchases passes at the  
**FAST Transit Center**



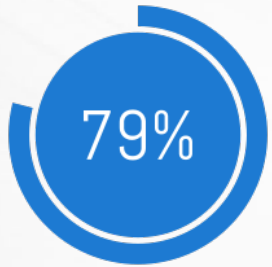
Primary Trip  
Purpose: **Work**



Primary Pass Type:  
**20-Ride Pass**

## New Fare Media Tolerance of All Survey Respondents

### Fixed Route

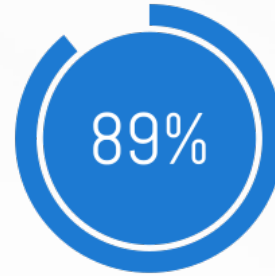


Comfort Using  
**Reloadable Fare  
Cards**



Comfort Using A  
**Mobile App**

### FASTTrac!



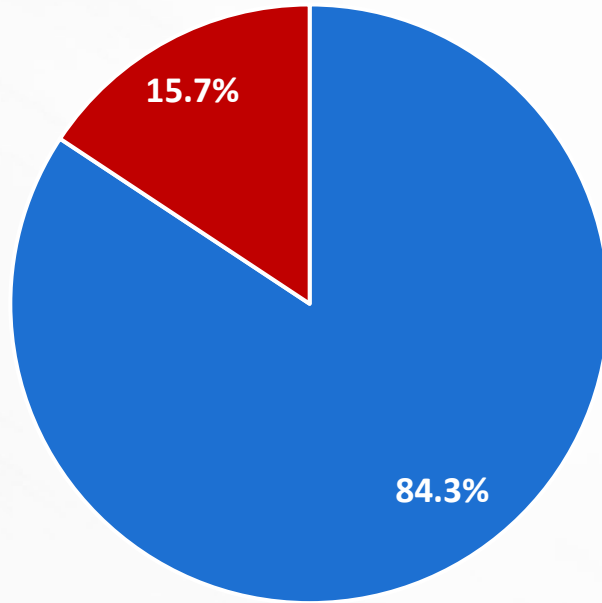
Comfort Using  
**Reloadable Fare  
Cards**



Comfort Using A  
**Mobile App**

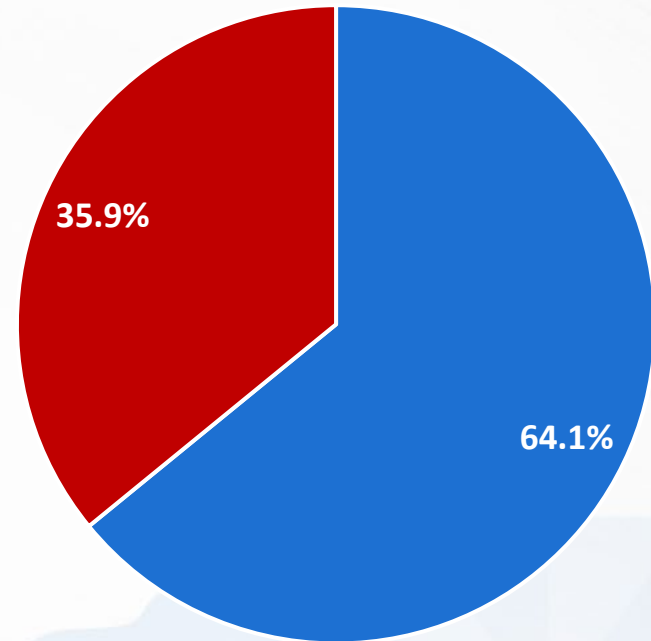
## Minority Status of All Survey Respondents

Fixed Route



■ Minority ■ Non-minority

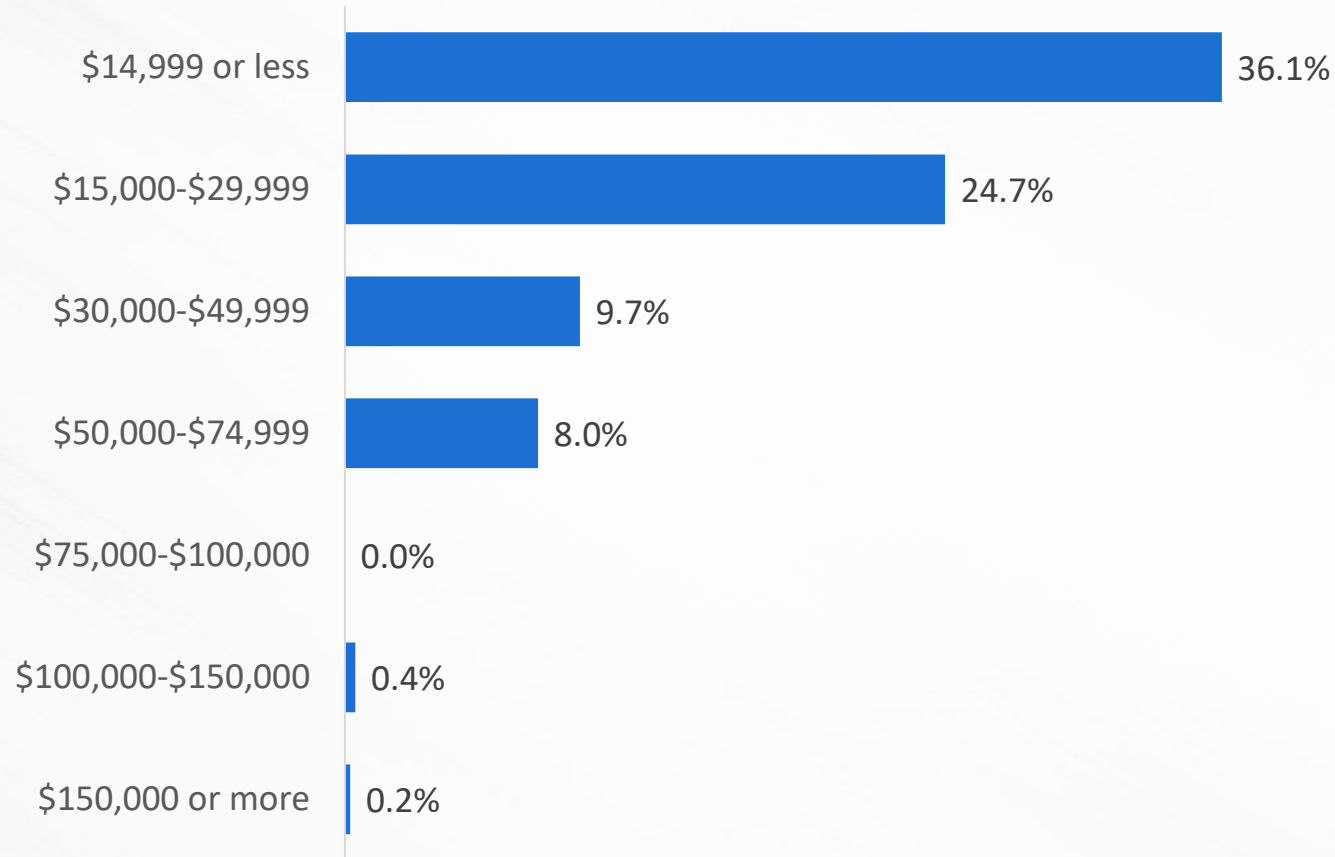
FASTTrac!



■ Minority ■ Non-minority



## Annual Household Income of All Survey Respondents

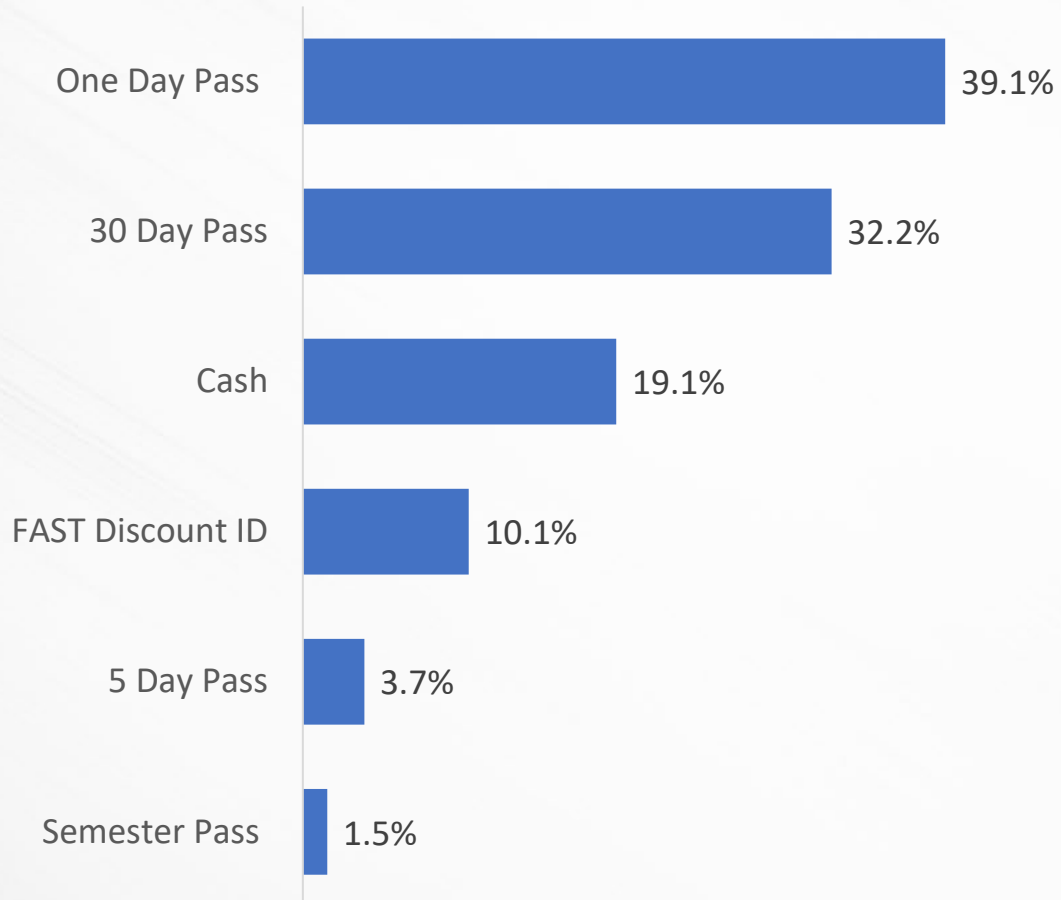


➤ ~**61%** reported a yearly household income of <**\$30,000**

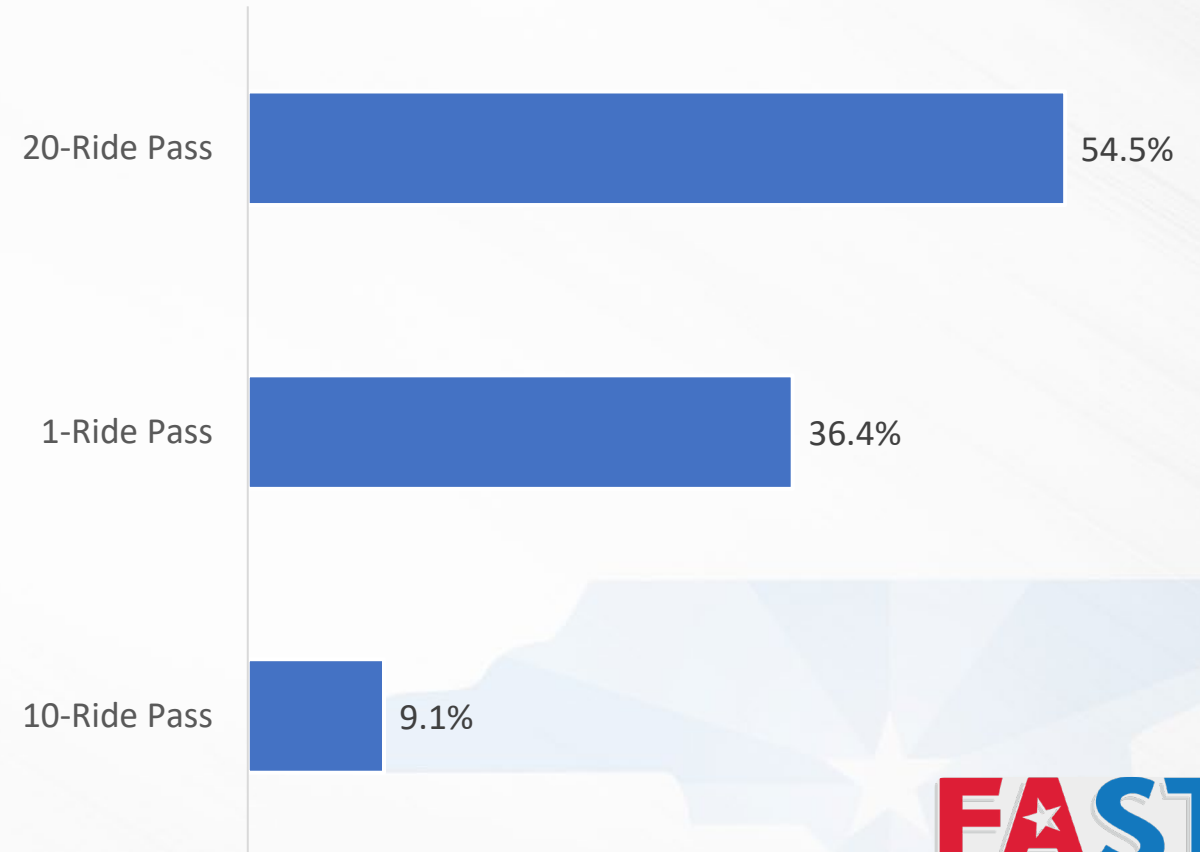
➤ ~**22%** did not provide a response

## Fare Payment of All Survey Respondents

### Fixed Route



### FASTTrac!



## FAST Fare Payment Options

- Cash upon boarding (Fixed Route passengers)
- Passes sold at the FAST Transit Center and (4) Carlie C's locations

## Available Fare Payment Options

- Smartphone Apps
- Self-Serve Kiosks
- Reloadable Fare Cards
- Tap-N-Go



## Geographic Peers, Fare Payment Options

Peer Agency	Urban Area Population	Cash Accepted on Bus or Counter?	Cashless Incentives	Additional Fare Media
<b>Fayetteville Area System of Transit (FAST)</b>	333,366	Both	None.	Token Transit App for local college students (FTCC, FSU, MU, and MMC)
<b>GoRaleigh</b>	1,106,646	Both	Fare capping is applied when paying fares with card or app.	Umo Smartcard, Umo Mobile App
<b>GoTriangle</b>	396,118	Both	Fare capping is applied when paying fares with card or app.	Umo Smartcard, Umo Mobile App
<b>Greensboro Transit Agency (GTA)</b>	248,111	Both	Fare capping is applied when paying fares with card or app.	Umo Smartcard, Umo Mobile App

## FAST's Fare Structure - Current

Fare Type	Cost	% Utilization (FY24)
<b><u>One-Ride Pass</u></b> One trip from the time you board the bus until it reaches the end of its route	\$1.25	10.2%
<b><u>One-Day Pass</u></b> Unlimited trips within a 24-hour period starting at the time of activation	\$3.00	39.3%
<b><u>Discount One Day Pass</u></b>	\$1.50	8.7%
<b><u>Youth One Day Pass</u></b>	\$2.00	1.8%
<b><u>5-Day Pass</u></b> Unlimited trips for 5 days starting at time of activation	\$11.00	2.7%
<b><u>Youth 5-Day Pass</u></b>	\$11.00	2.0%
<b><u>30-Day Pass</u></b> Unlimited trips for 30 days starting at the time of activation	\$40.00	15.5%
<b><u>Discount 30-Day Pass</u></b>	\$17.00	12.6%
<b><u>Youth 30-Day Pass</u></b>	\$30.00	2.0%
<b><u>FASTTrac! Pass</u></b> (1-Ride, 10-Ride or 20-Ride)	\$2.00, \$17.50, or \$35.00	2.5%

*Fare structure implemented April 2013*



## Geographic Peers, Fare Structure - FY23

Peer Agency	Fixed Route Ridership	Fixed Route Fares				ADA Fare (One-Way)
		One-Way Fare (Discounted)	Daily Pass (Discounted)	5-Day/Weekly Pass (Discounted)	30-Day/Month Pass (Discounted)	
<b>Fayetteville Area System of Transit (FAST)</b>	2,125,796	\$1.25 (\$0.50)	\$3.00 (\$1.50)	\$11.00 (\$5.50)	\$40.00 (\$17.00)	\$2.00
<b>Asheville Transit System (ATS)</b>	1,377,810	\$1.00 (\$0.50)	-	-	\$20.00 (\$10.00)	\$2.00
<b>Cape Fear Public Transportation Authority (dba Wave Transit)</b>	668,499	\$2.00 (\$1.00)	-	\$20.00 (\$10.00)	\$80.00 (\$40.00)	\$4.00
<b>GoRaleigh</b>	4,518,659	\$1.25 (\$0.60)	\$2.50 (\$1.25)	\$12.00 (\$6.00)	\$40.00 (\$20.00)	\$2.50
<b>GoDurham</b>	5,616,072	-	-	-	-	-
<b>Greensboro Transit Agency (GTA)</b>	2,091,569	\$1.50 (\$0.75)	\$4.00 (\$2.00)	-	\$58.00 (\$29.00)	\$2.50

## Fare Policy Recovery Goal:

### ➤ Recovery of Operating Costs

- Customer/User fares/fees “should help support the business costs related to providing quality public transportation services. The City Council may establish a goal or goals related to cost recovery. Cost recovery is not only determined by adequate fare revenues, but also prudent control of operating costs. It is the goal of FAST to recover a minimum of 20% of transit operating costs with transit system generated revenues, including but not limited to passenger paid and third-party fares by FY 2020.”
- The 20% goal by 2020 includes passenger fares, and other system generated revenues such as leases, advertising, other miscellaneous revenues and third-party route subsidies.

*Note: Established in 2013, the operating recovery rate was 17%. Fares alone recovered 15.5%.*

## Fare Policy Recovery Goal (FY24):

### ➤ Operating Expenses:

#### ✓ *Operating Recovery - ~7.5%*

- Accounts for passenger fares, and other system generated revenues such as leases, advertising, other miscellaneous revenues and third-party route subsidies

#### ✓ *Fares - ~6.15%*

- Accounts for fares alone



## Potential Revenue Impact of Most Popular Passes

Fare Type	% Increase in Price	New Price	Increase in Revenue with no Ridership Loss	Potential % Ridership Loss	Increase in Revenue with Ridership Loss
One Ride (\$1.25)	20%	\$1.50	\$26,611	6%	\$17,031
One Ride (\$1.25)	40%	\$1.75	\$53,222	12%	\$30,869
One Ride (\$1.25)	60%	\$2.00	\$79,833	18%	\$41,513
One-Day (\$3.00)	20%	\$3.60	\$7,609	6%	\$4,870
One-Day (\$3.00)	40%	\$4.20	\$15,218	12%	\$8,827
One-Day (\$3.00)	60%	\$4.80	\$22,828	18%	\$11,870
30-Day (\$40.00)	20%	\$48.00	\$20,774	6%	\$13,276
30-Day (\$40.00)	40%	\$56.00	\$41,488	12%	\$24,063
30-Day (\$40.00)	60%	\$64.00	\$62,232	18%	\$32,361
<b>Total Farebox Impact (All)</b>	<b>20%</b>		<b>\$154,781</b>	<b>6%</b>	<b>\$99,060</b>
<b>Total Farebox Impact (All)</b>	<b>40%</b>		<b>\$309,562</b>	<b>12%</b>	<b>\$179,546</b>
<b>Total Farebox Impact (All)</b>	<b>60%</b>		<b>\$464,343</b>	<b>18%</b>	<b>\$241,458</b>

Proposed service/route modifications were derived from **STEP 2** of FAST's Transit Development Plan (TDP)\*

- **STEP 01:** Complete – 91%
- **STEP 02:** *In-Process*
- **STEP 03:** Forthcoming



\* Approved by Council – Aug. 2022



## STEP 2: IMPROVE SERVICE

### ➤ Priorities

- #1: Revise (5) lowest ridership routes
- #2: Increase frequency - (5) highest ridership routes
- #3: Adjust service levels on lowest ridership holidays

Fiscal Year	Routes
2025	3, 5, 7, and 8
2026	4, 6, 9, 14, 16, and 18
2027	11, 12, 15, 17, and 19
2028	10, 30, and 31

*2022 TDP Timeline – Frequency Improvements*

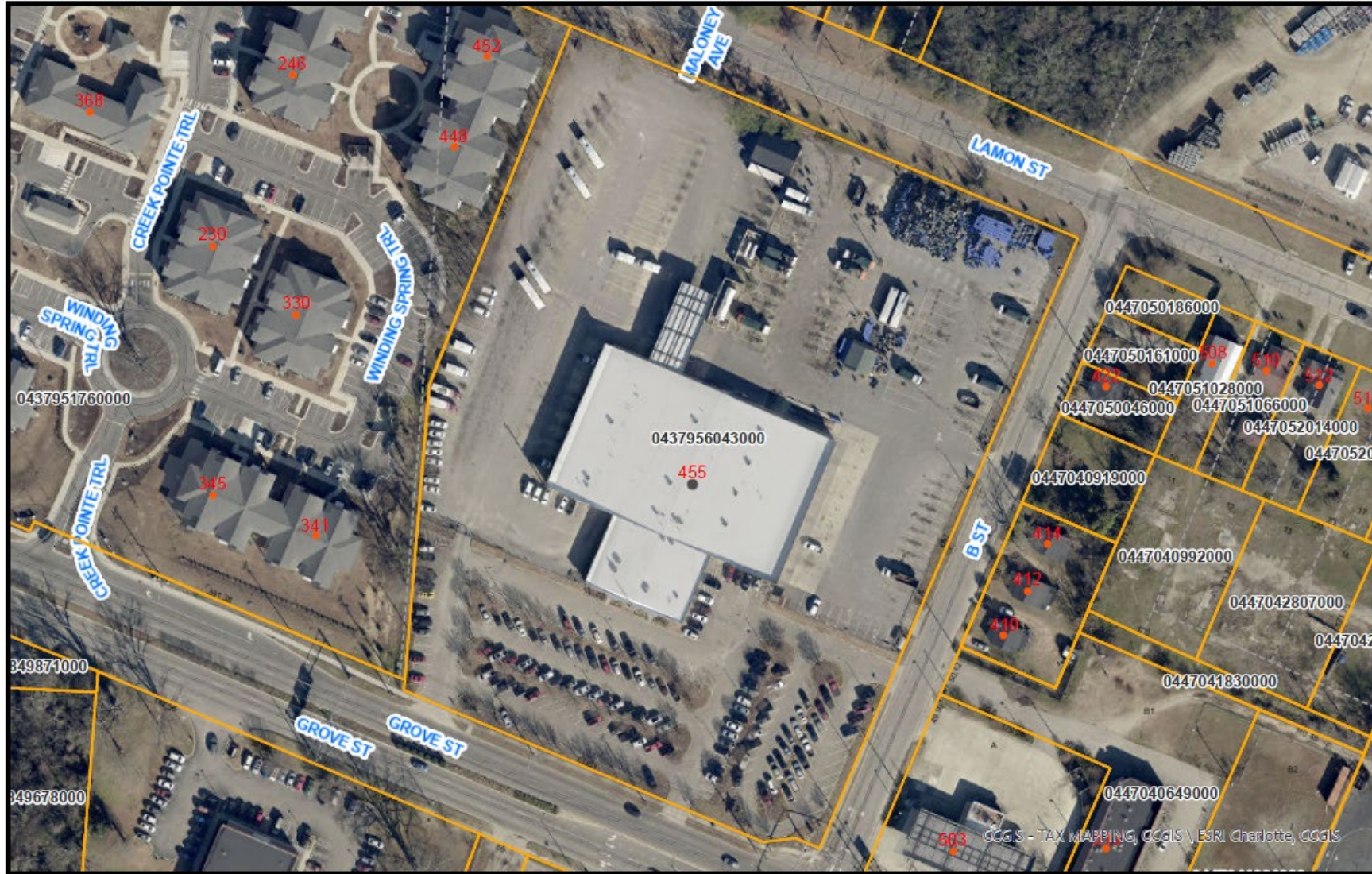
## STEP 3: EXPAND SERVICE

### ➤ Priorities

- #1: Regional service to Hope Mills, Spring Lake, etc.
- #2: Expand service to Ft. Bragg, Fly FAY, etc.

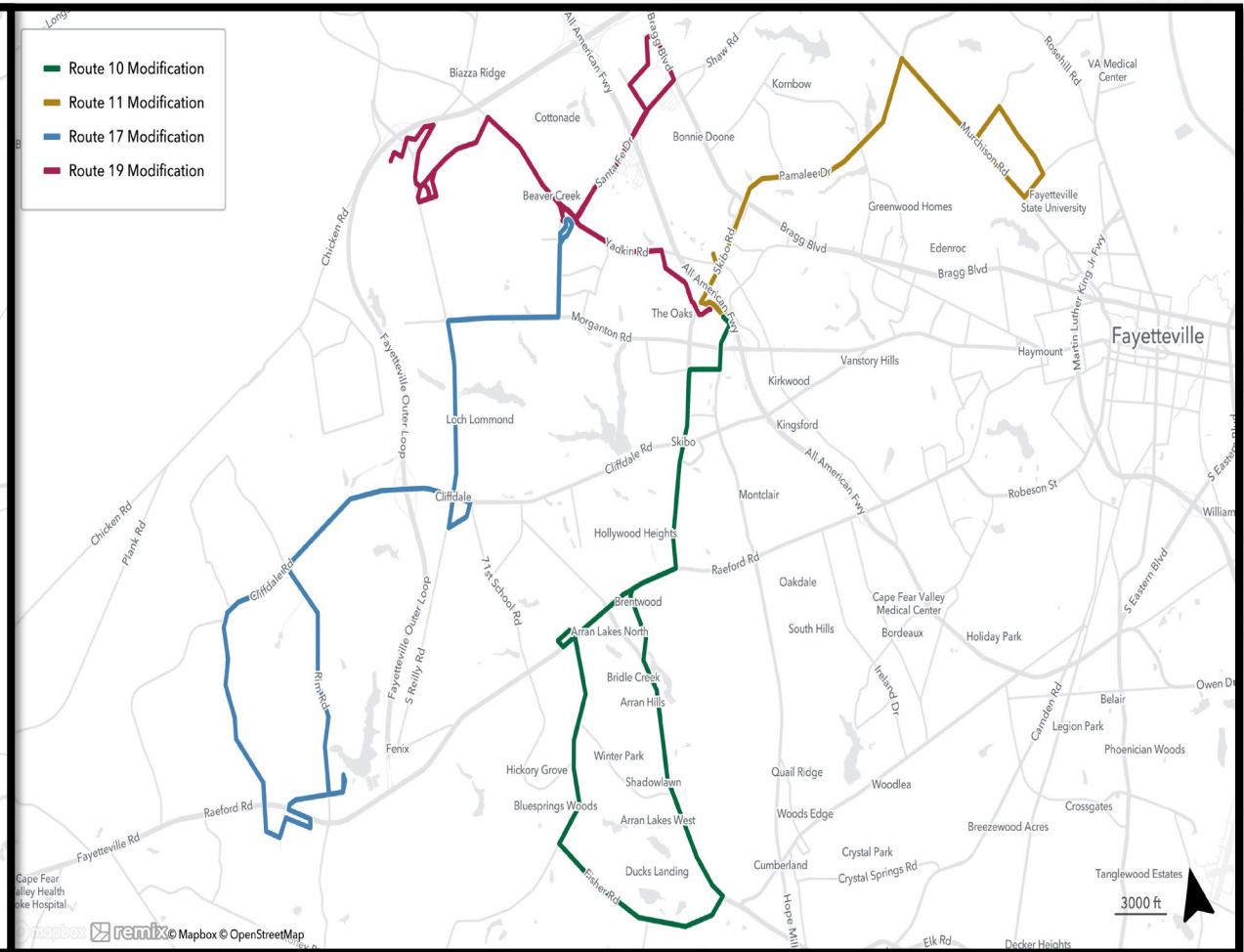
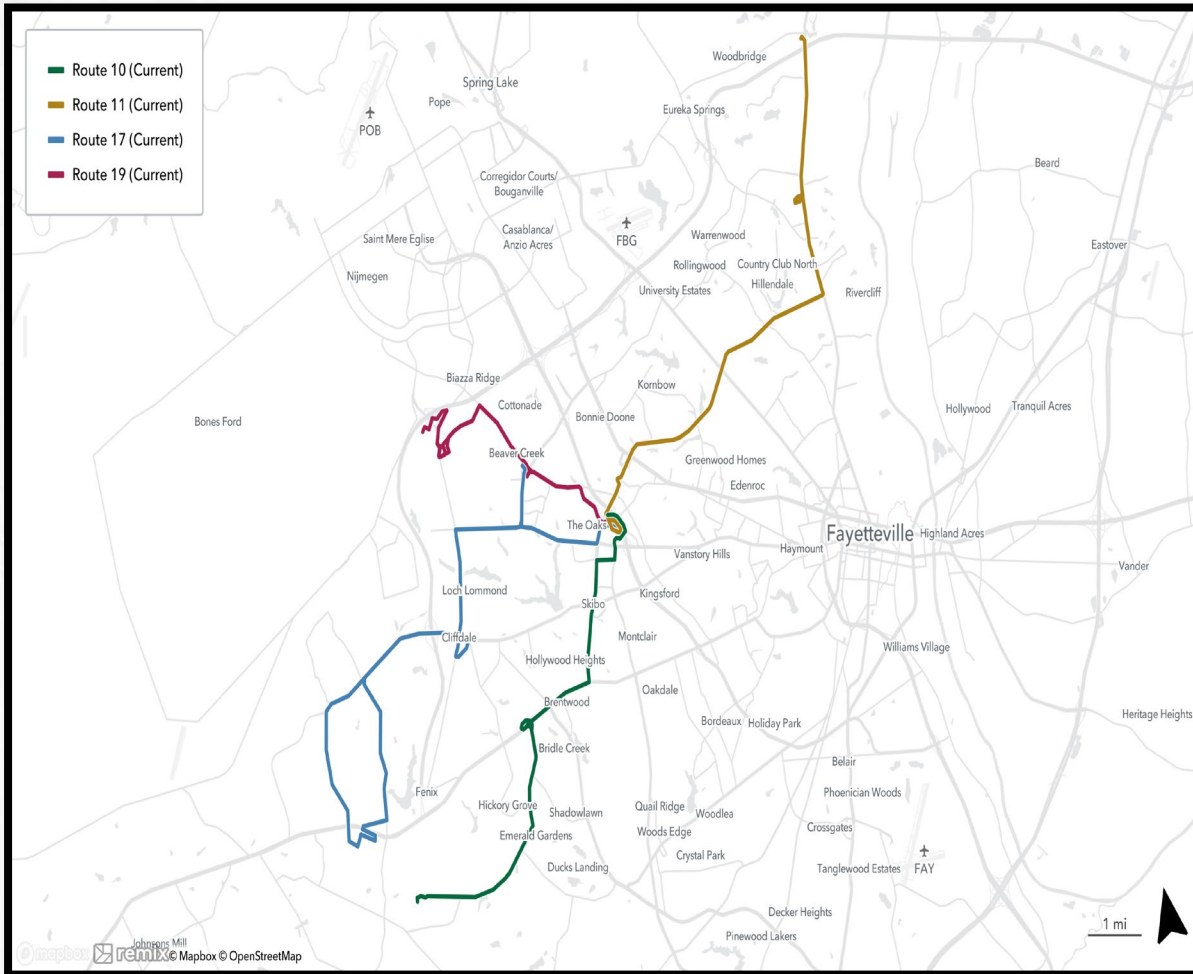




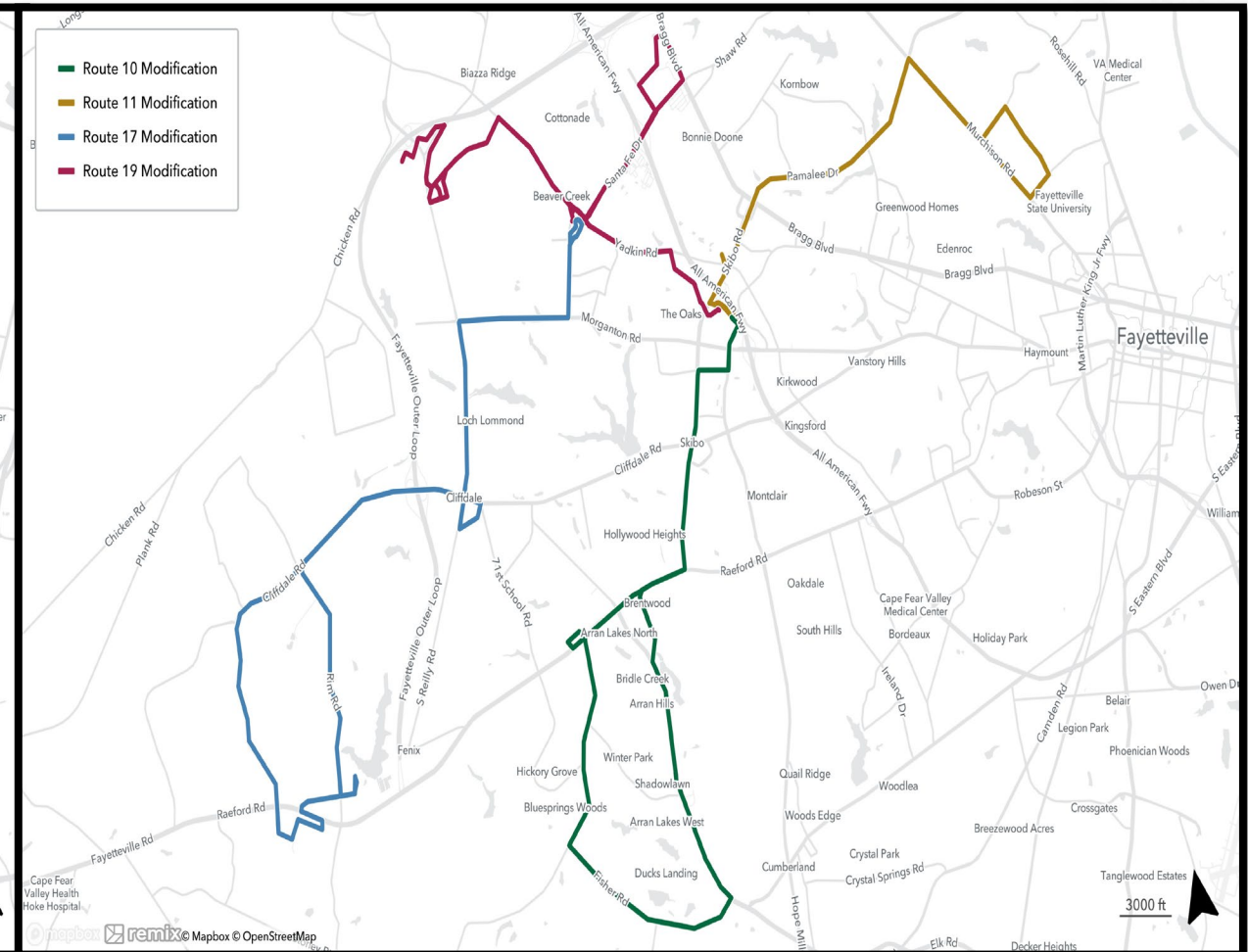
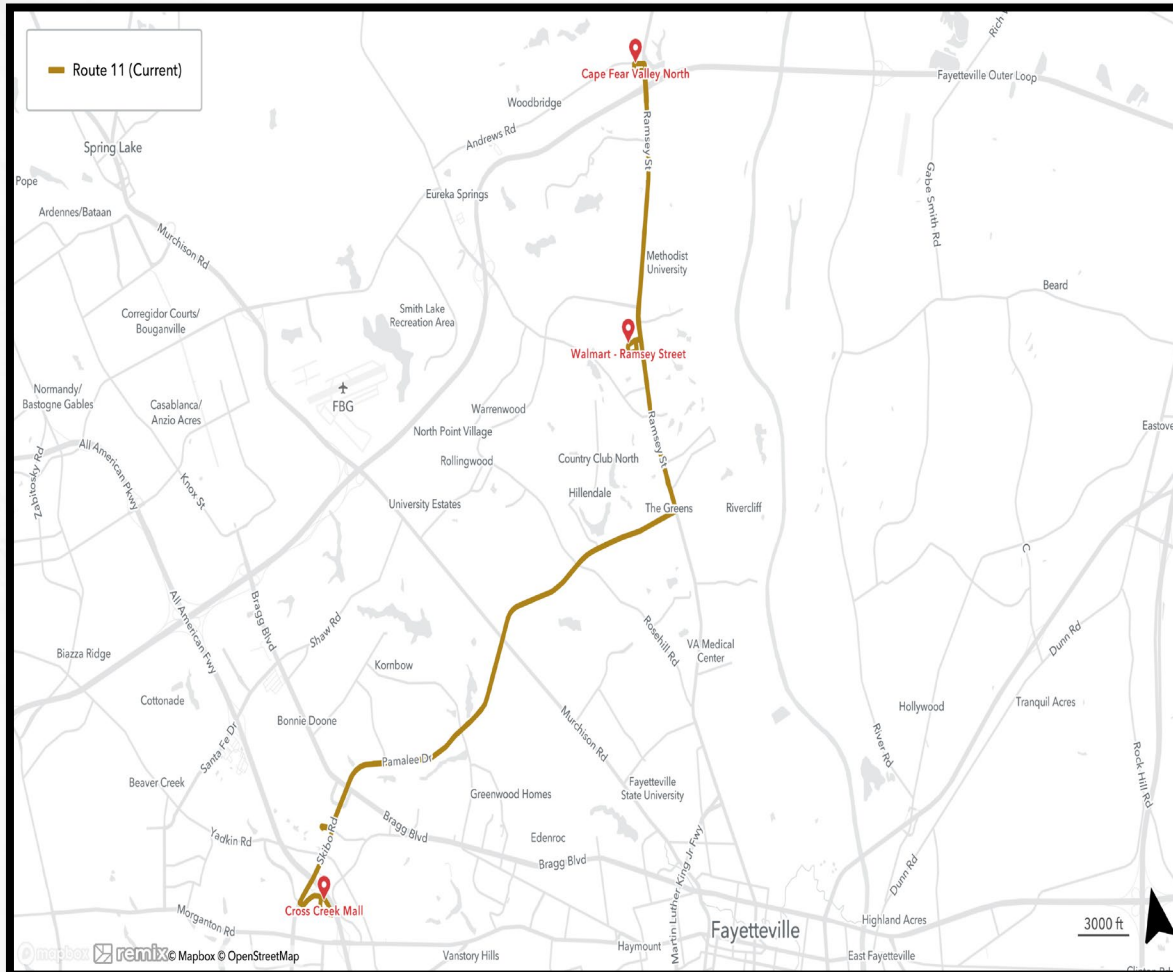




## CURRENT & PROPOSED ROUTE STRUCTURE



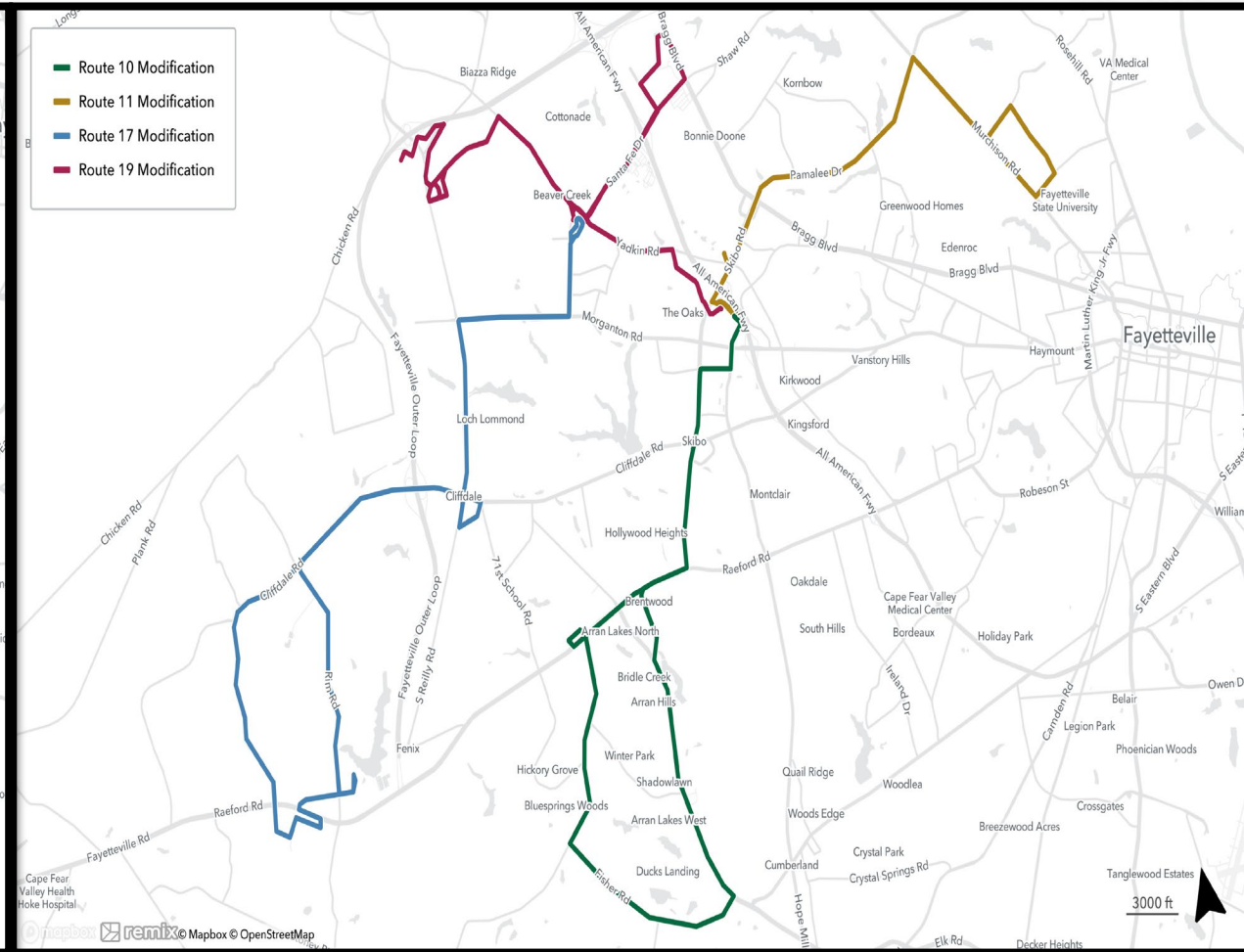
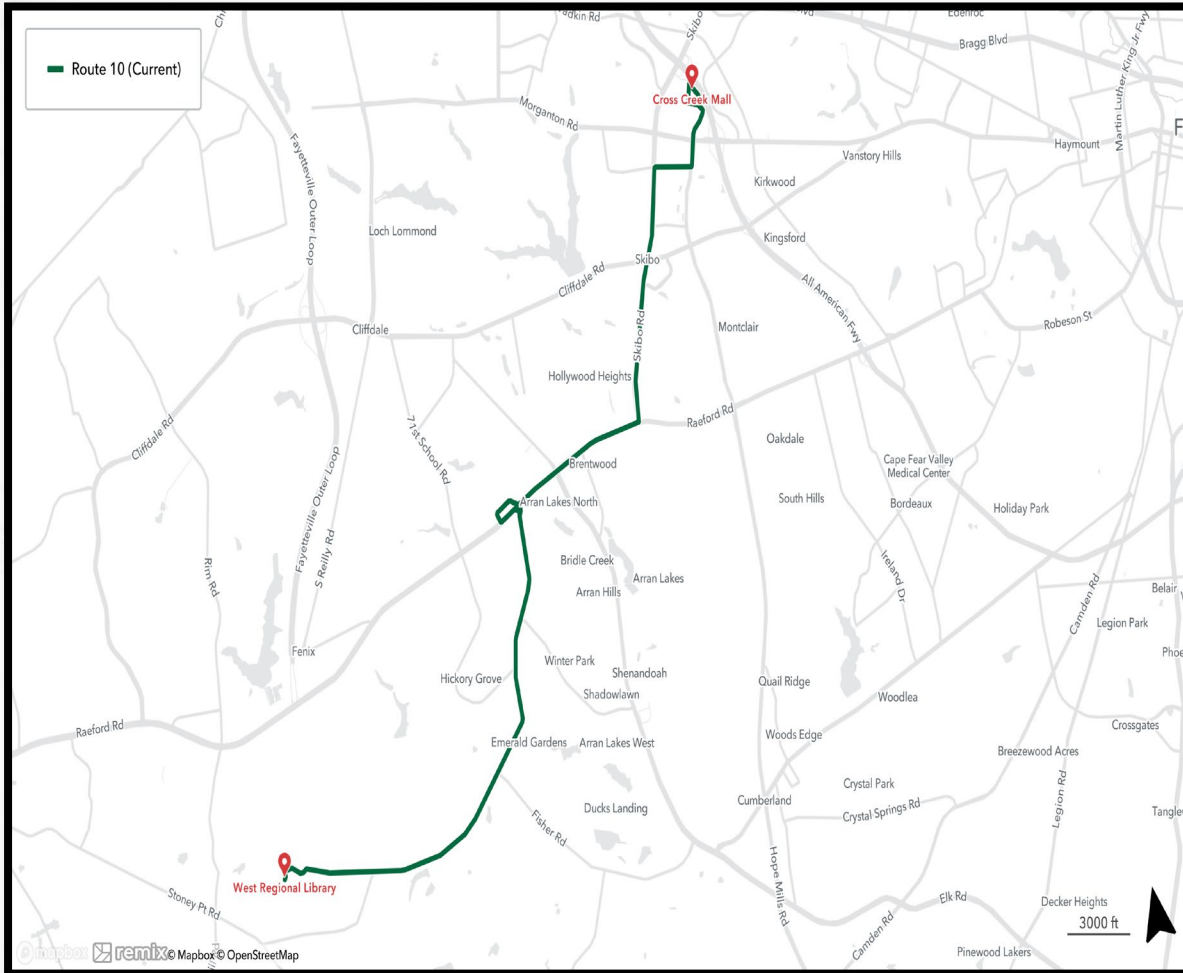
## SERVICE MODIFICATIONS – ROUTE #11



Route #11 (Cape Fear Valley North; Cross Creek Mall)

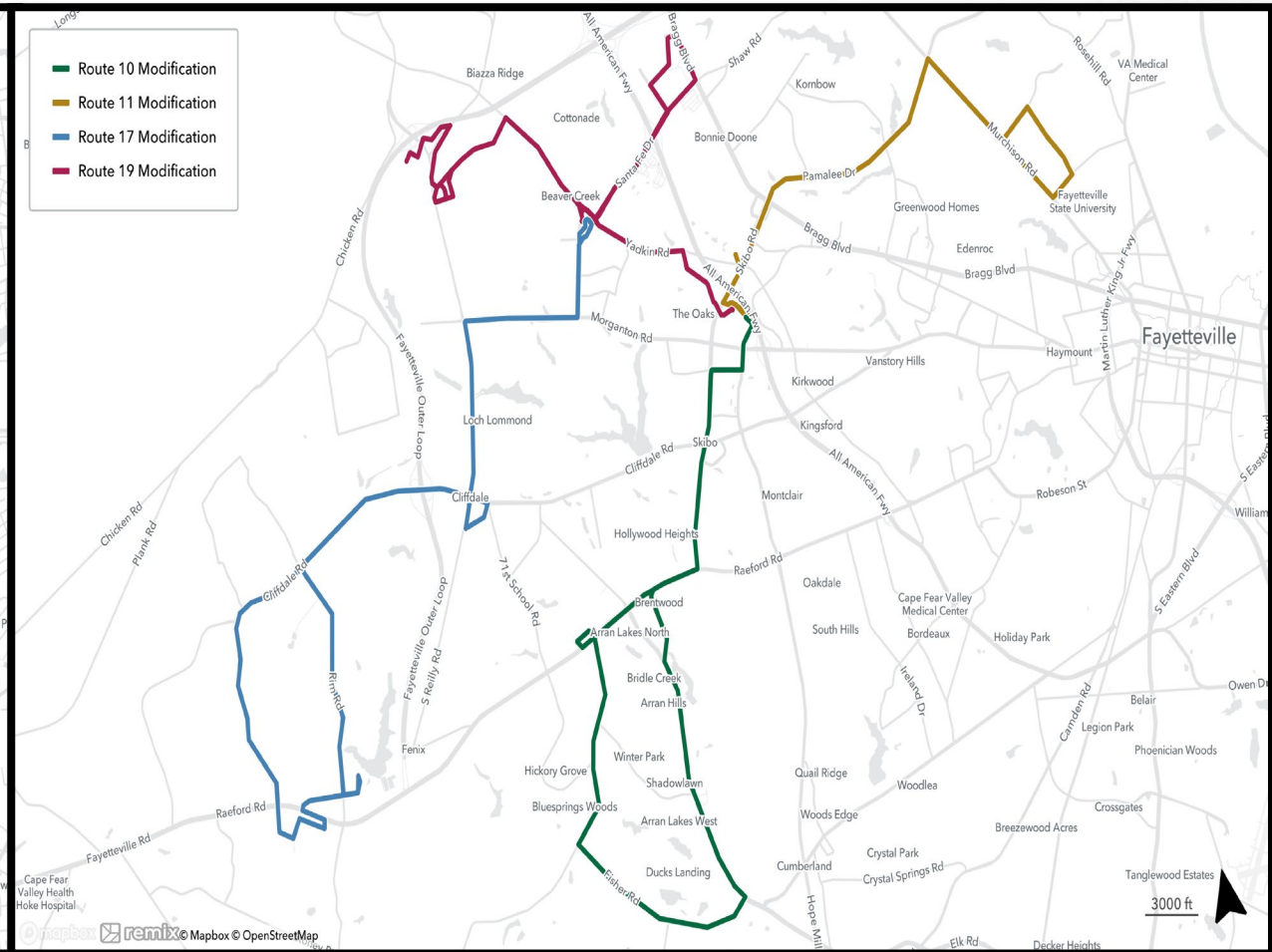
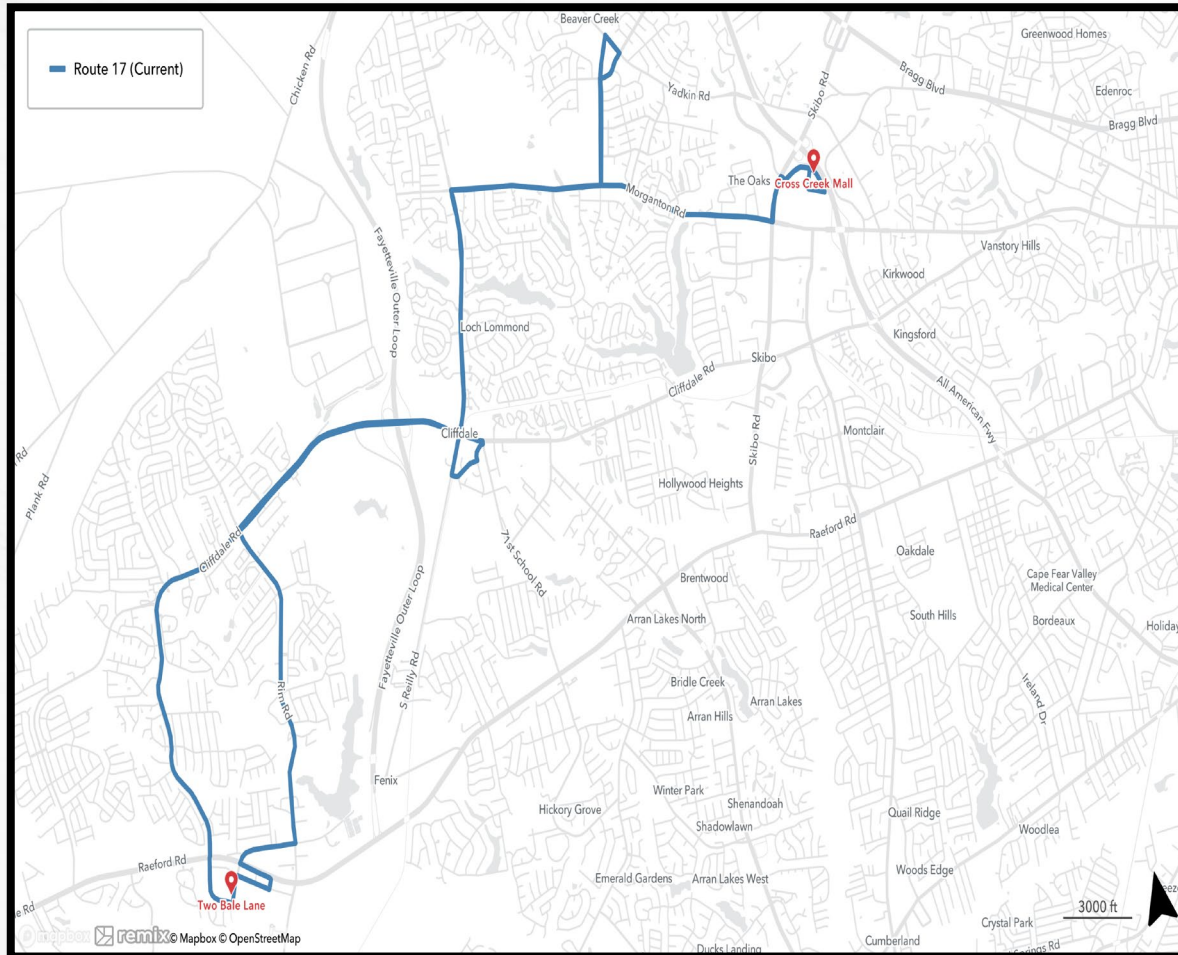


## SERVICE MODIFICATIONS – ROUTE #10



Route #10 (Cross Creek Mall; West Regional (New Century) Library)

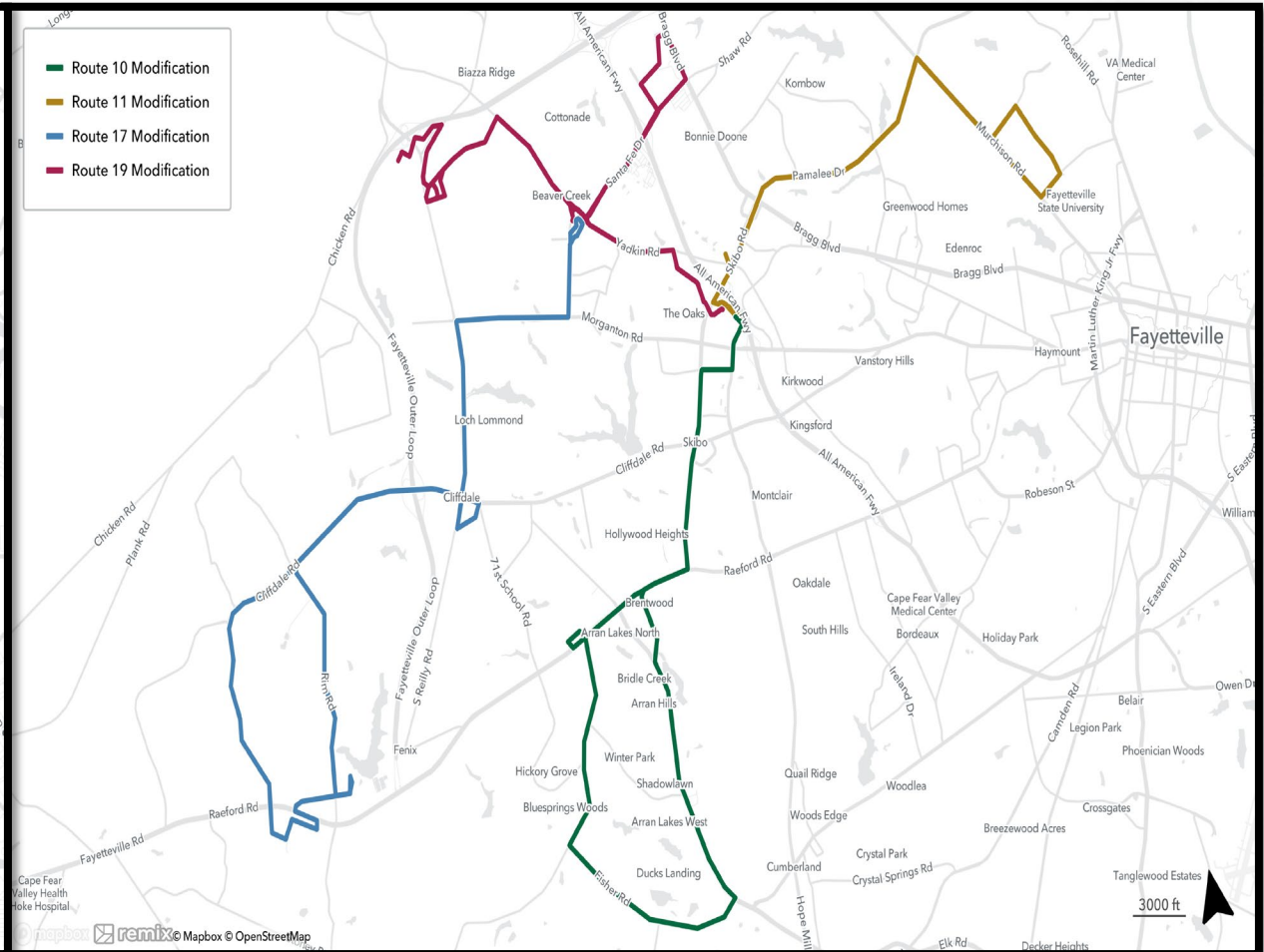
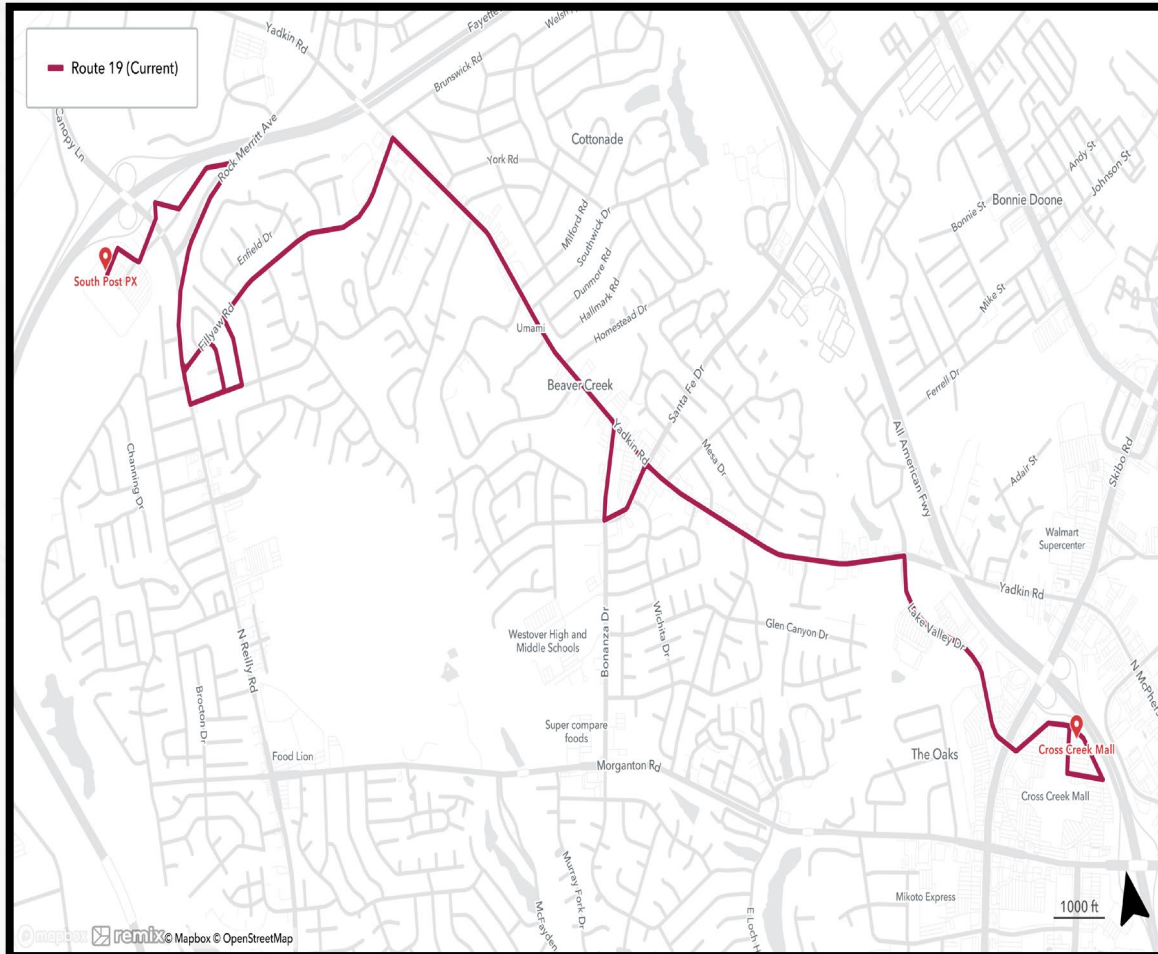
## SERVICE MODIFICATIONS – ROUTE #17



Route #17 (Cross Creek Mall; Two Bale Lane)

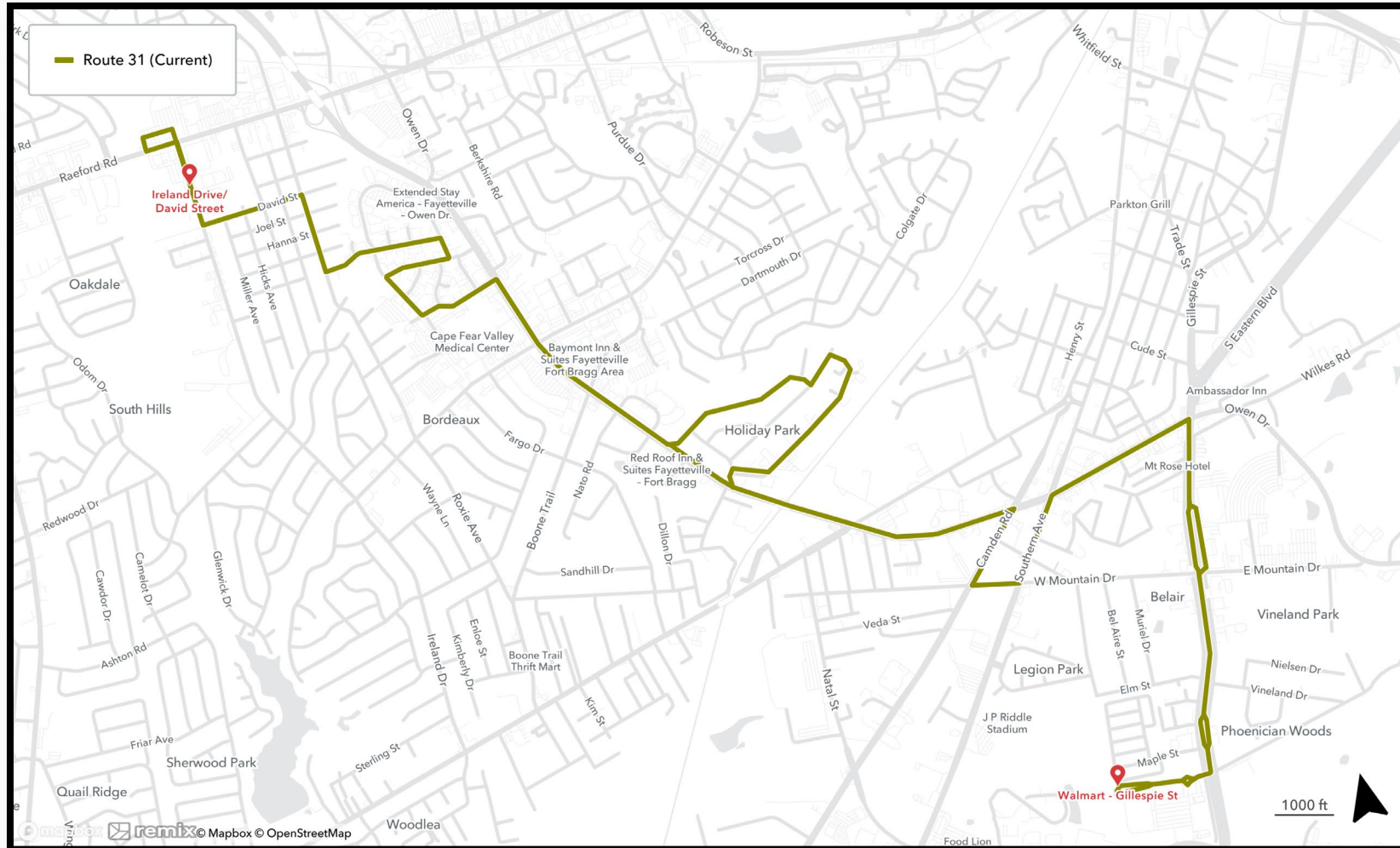


## SERVICE MODIFICATIONS – ROUTE #19



Route #19 (South Post PX; Cross Creek Mall)

## SERVICE MODIFICATIONS – ROUTE #31



Route #31 (Ireland Drive; Walmart - Gillespie)

## FARE MEDIA

### Phased Approach (FY26 – FY28)

#### ➤ FY26

- Maintain current media (cash, paper passes)
- Introduce new fare media (i.e. reloadable farecards, kiosks, etc.)
- Introduce Fare Capping



## FARE MEDIA (cont'd)

### Phased Approach (FY26 – FY28)

#### ➤ FY27

- Discontinue use of cash on buses (Cash can be used to purchase passes from FAST Transit Center, Authorized FAST Retailers (i.e. Carlie C's, etc.) and/or Kiosks)
- Implement new fare media (i.e. reloadable farecards, kiosks, etc.)
- Implement Fare Capping





## FARE MEDIA (cont'd)

### Phased Approach (FY26 – FY28)

#### ➤ FY28

- Discontinue use of cash for all fare media options excluding Self-Serve Kiosks & authorized Carlie C's locations
- Introduce new fare media (i.e. mobile app(s), etc.)



## FARE STRUCTURE

If approved...

- Adjust fares (pricing) by equal %
- Modify current 5-Day Pass to *new* 7-Day Pass
  - Cost-friendlier option to the underutilized 5-Day Pass
  - Promotes an increase in ridership
    - 5-Day Pass: \$11.00
    - ***Proposed*** 7-Day Pass: \$15.00
      - Break-Even Point: (12) One-Ride Trips/(5) 1-Day Passes

## SERVICE MODIFICATIONS – FIXED ROUTE

### *Priority #1: (5) Lowest Ridership Routes*

- Route 11: Route modification
- Route 10: Route modification
- Route 17: Route modification
- Route 19: Route modification
- Route 31: No modification (adverse impact)

## SERVICE MODIFICATIONS – FIXED ROUTE (cont'd)

### *Priority #2: (5) Highest Ridership Routes*

- Routes #3 & #5 (Post-COVID)
  - Reinstate 30-minute service
- Routes #4 & #12 (Pre-COVID)
  - Reinstate 30-minute service
- Route #14
  - Implement 30-minute service



## SERVICE MODIFICATIONS

### *Priority #3: Reduction of Holiday Service - Lowest Ridership*

Holiday	Fayetteville (FAST)	Greensboro (GTA)	Wilmington (Wave)	Asheville (ATS)	Durham (GoDurham)	Raleigh (GoRaleigh)
Martin Luther King Day	Full Service	No Service	No Service	No Service	Sunday -Level Service Ends at 7 pm	Sunday -Level Service Ends at 7 pm
Memorial Day	Saturday -Level Service Ends at 7 pm	No Service	No Service	No Service	Sunday -Level Service Ends at 7 pm	Sunday -Level Service Ends at 7 pm
Labor Day	Saturday -Level Service Ends at 7 pm	No Service	No Service	No Service	Sunday -Level Service Ends at 7 pm	Sunday -Level Service Ends at 7 pm

*Eliminate/Reduce service on MLK Day, Memorial Day and Labor Day*

Questions or Concerns?





 **FAYETTEVILLE** <sup>NC</sup>  
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