



BOSTON REGION METROPOLITAN PLANNING ORGANIZATION

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WORK PROGRAM

MBTA SFY 2024 NATIONAL TRANSIT DATABASE: DATA COLLECTION AND ANALYSIS

APRIL 13, 2023

Proposed Motion

The Boston Region Metropolitan Planning Organization (MPO) votes to approve this work program.

Project Identification

Unified Planning Work Program (UPWP) Classification

Agency and Other Client Transportation Planning Studies and Technical Analyses

Project Number 14378

Client

Massachusetts Bay Transportation Authority (MBTA)

Client Supervisor: Robert Guptill

Project Supervisors

Principal: Paul Christner

Manager: Bradley Putnam

Funding Source

Future MBTA Contract

Schedule and Budget

Schedule: 18 months from notice to proceed

Budget: \$204,782

Schedule and budget details are shown in Exhibits 1 and 2, respectively.

The overhead rate used to calculate the budget is subject to change every July 1st based on the approved projected overhead rate for the state fiscal year (SFY).

Relationship to MPO Work

This study is supported in full with non-MPO funding. Committing MPO staff to this project will not impinge on the quality or timeliness of MPO-funded work.

Background

For decades, in support of the Massachusetts Bay Transportation Authority's (MBTA) National Transit Database (NTD) submittals to the Federal Transit Administration (FTA), the Central Transportation Planning Staff (CTPS) has produced estimates of passenger-miles traveled and unlinked passenger trips for the MBTA's bus and trackless trolley modes.¹ Over the years, the scope of these analyses expanded to include other modes: Heavy and light rail were added in SFY 1996, commuter rail in SFY 2000, purchased-service bus routes (routes for which the MBTA contracts with a private carrier to provide service) in SFY 2001, and bus-bridge service in SFY 2021.

Directly Operated Bus Data

The MBTA uses its automatic passenger counter (APC) data, verified by on-board passenger counts (also called ridechecks), to estimate the unlinked passenger trips and passenger-miles traveled on its directly operated bus and rapid-bus modes.

The MBTA has been using APC data for reporting to the NTD since FTA allowed the practice in SFY 2014. At that time, the FTA requested that the MBTA reclassify some bus routes as part of the rapid-bus mode for NTD reporting. As directed by FTA two years later, in SFY 2016, CTPS began verifying these data with ridechecks on APC-equipped buses.

Purchased-Service Bus Data

In SFY 2019, some of the purchased-service bus routes began to use APC-equipped vehicles. For these routes, the MBTA used APC data to estimate unlinked trips and passenger-miles traveled. As with directly operated buses, CTPS conducted ridechecks on APC-equipped purchased-service buses to verify APC data. CTPS used full-route ridechecks to estimate total passenger-miles traveled and unlinked passenger trips for purchased-service bus routes not equipped with APCs. CTPS will continue to collect these data in SFY 2024.

Bus-Bridge Service Data

In SFY 2021, CTPS began collecting data to estimate unlinked passenger trips and passenger-miles traveled for temporary bus-bridge service, which the MBTA provides

¹ In SFY 2022, the MBTA replaced its trackless trolleys with motor buses, so SFY 2022 was the final year in which CTPS collected data on trackless trolleys.

when portions of rail service are temporarily suspended for maintenance. This data collection will continue in SFY 2024.

Heavy and Light Rail Data

Beginning in SFY 2017, the MBTA and CTPS decided to use a rolling three-year average for some of the intermediate factors used to derive passenger-miles traveled and unlinked trips on heavy and light rail. In SFY 2021, the MBTA and CTPS resumed using annual data for those intermediate factors due to disruptions in data collection caused by the COVID-19 pandemic.

Summary

Table 1 summarizes the data that CTPS collects and processes to estimate the average trip length, passenger-miles traveled, and unlinked trips for each mode, and the sources of these data.

**Table 1
Data and Sources for Unlinked Passenger Trip
and Average Trip Length Calculations**

Mode	Unlinked Passenger Trips						Average Trip Length					
	MB	RB	MB	HR	LR	CR	MB	RB	MB	HR	LR	CR
Service type	DO	DO	PS	DO	DO	PS	DO	DO	PS	DO	DO	PS
CTPS Data												
Ridecheck data for APC verification	X	X	X				X	X	X			
Full-route ridecheck			X						X			
Noninteraction survey				X	X							
Fare-mix survey			X									
Transit trip survey				X	X					X	X	
MBTA Data												
APC data	X	X	X				X	X	X			
AFC boardings				X	X							
Revenue reports			X									
ODX data (potential)				X	X				X	X		
Passenger counts (Keolis or CTPS)												X
mTicket data												X

Note: ODX data, if used, would replace transit trip survey data to estimate transfer factors and average trip lengths. PS is known as Purchased Transportation in the NTD.

AFC = Automated Fare Collection. APC = Automatic Passenger Counter. CR = Commuter Rail. CTPS = Central Transportation Planning Staff. DO = Directly Operated. HR = Heavy Rail. LR = Light Rail. MB = Motorbus. MBTA = Massachusetts Bay Transportation Authority. mTicket = Mobile Ticketing. ODX = Origin-Destination-Transfer Model. PS = Purchased Service. RB = Rapid Bus.

Objectives

The objectives of this project are as follows:

- Develop estimates of passenger-miles traveled and unlinked trips for the following MBTA directly operated transportation modes: bus, rapid bus, heavy rail, and light rail.
- Develop an estimate of the average trip length per passenger for the commuter rail mode, estimates of passenger-miles traveled and unlinked trips for contracted MBTA local bus service, and estimates of passenger-miles traveled and unlinked trips on temporary bus-bridge service.
- Review the MBTA's APC-derived passenger-miles traveled and boarding estimates.

CTPS will use the following methods to collect the data on which these estimates will be based:

1. Ridechecks on a sample of APC-equipped buses on the directly operated bus, rapid bus, and the purchased-service bus modes
2. Full-route ridechecks, including farebox fare-mix surveys, on the purchased-service bus mode for the routes without APC-equipped buses
3. Transit trip surveys on heavy rail, light rail, and rapid-bus modes to determine origin-destination information (transfer rates and average trip lengths)
4. Faregate noninteraction, farebox noninteraction, and rear-door entry surveys from stations or Green Line and Mattapan Line vehicles equipped with automated fare collection (AFC) technology (noninteraction surveys count passengers who pass by faregates or fareboxes, including those who do not use fare media)
5. Inferred origin-destination information from AFC data, if available from the MBTA or its partners, to determine origin-destination information (transfer rates and average trip lengths)
6. Commuter rail ridership data from passenger counts conducted by the MBTA or its contractors or from the MBTA's mobile-ticketing vendor
7. Counts of temporary bus-bridge passengers during sample periods when portions of rail service are temporarily suspended for maintenance and replaced with bus service

Work Description

Task 1 Develop Sampling Plans

For the directly operated bus and rapid-bus modes, CTPS will work with MBTA staff to develop a sampling plan for conducting ridechecks during SFY 2024. CTPS's staffing availability and the MBTA's needs will determine the extent of the data collection.

For the purchased-service bus mode, CTPS will develop a sampling plan for conducting ridechecks to verify the accuracy of the APC data in consultation with MBTA staff. CTPS will also develop a sampling plan for conducting full-route ridechecks on the non-APC equipped routes, including fare-mix surveys. CTPS will perform the ridechecks over the course of a single quarter during SFY 2024. CTPS's staffing availability will determine the selection of quarters.

For the heavy rail mode, light rail mode, and rapid-bus mode, CTPS will develop a sampling plan for passenger surveys that will ensure that surveys are conducted at a random selection of stations over the course of an entire year and that the results represent all days of the week and all service periods. CTPS will also conduct noninteraction surveys at the stations that have faregates.

For light rail service at surface stops, onboard observations are necessary because not all passengers interact with fare-collection equipment when boarding Green Line and Mattapan Line vehicles. CTPS will conduct counts of passengers who do not interact with the farebox. For each car, it may be necessary to have two ridecheckers: one to count the number of rear boardings and the other to count the number of passengers boarding through the front door by category—those who interact with the farebox and those who do not interact with the farebox (the latter include flash-pass trips, children, and fare evaders). CTPS will develop a sampling plan that will ensure that these observations are conducted on surface light rail over the entire year for all days of the week and all service periods.

For the commuter rail mode, CTPS may obtain and analyze four potential data sources: conductor audits, data from the MBTA's mobile-ticketing vendor, Keolis Commuter Services' passenger counts, and CTPS's passenger counts collected as a part of a separate project. No direct data collection is planned for commuter rail.

For the ferry mode, CTPS may obtain and analyze passenger counts or other data from the MBTA's ferry operator. No direct data collection is planned for ferries.

For temporary bus-bridge service, CTPS will develop a sampling plan for counting passengers who board or alight buses that are providing substitute service for segments of rail lines that have been temporarily suspended.

Products of Task 1

- Sampling plan for SFY 2024 directly operated bus and rapid-bus ridechecks
- Sampling plan for SFY 2024 purchased-service bus ridechecks and fare-mix surveys
- Sampling plan for SFY 2024 passenger surveys
- Sampling plan for SFY 2024 faregate noninteraction counts and surface light rail observations
- Sampling plan for SFY 2024 temporary bus-bridge counts

Task 2 Collect Data

CTPS will complete the ridecheck assignments generated by the sampling plans created in Task 1 for the directly operated bus mode, the rapid-bus mode, and the purchased-service bus mode. CTPS will classify how passengers on purchased-service buses that are not equipped with APC pay for their trips. For heavy rail and light rail, CTPS will conduct passenger surveys at each of the survey locations. Staff will conduct counts of the number of passengers passing through faregates, including those who do not interact with the faregates, at survey locations in stations that have faregates. Along Green Line and Mattapan Line surface routes, CTPS will conduct onboard counts of passengers, including those who do not interact with the farebox. For temporary bus bridges, CTPS will count bus boardings or alightings at locations where the MBTA is substituting bus service for regular rail service.

The MBTA will provide CTPS with detailed AFC data for the heavy and light rail modes; monthly and annual fare revenue reports for the purchased-service bus routes; and APC data for the purposes of verifying directly operated bus, rapid-bus, and APC-equipped purchased-service bus unlinked passenger trips and average trip length. If the MBTA concludes that data from the MBTA's origin-destination-transfer model (ODX) is sufficient for NTD reporting purposes, the MBTA will provide CTPS with relevant ODX output in addition to AFC data.

Products of Task 2

- Ridecheck data for a selection of trips on the directly operated bus mode, the rapid-bus mode, and the purchased-service bus mode with APC-equipped buses for verifying APC data
- Full-route ridecheck data for the purchased-service bus mode without APC-equipped buses
- Transit trip survey results
- Noninteraction data for faregates at stations and for fareboxes on the directly operated surface light rail mode
- Potential ODX transfer factors and average passenger trip length for heavy rail, light rail, and gated portions of the rapid-bus mode
- Counts of temporary bus-bridge boardings or alightings

Task 3 Process Ridecheck, Passenger Survey, and Passenger Count Data

CTPS will process the ridecheck, passenger survey, and passenger count data, including data on passenger noninteraction with faregates and fareboxes. Completed assignments will be checked for accuracy and completeness, and incomplete assignments will be redone. The number and types of remaining assignments will be monitored throughout the fiscal year to ensure that all types of assignments are completed in a timely manner.

The data collected on ridechecks will be uploaded to CTPS's bus ridership database, and these data will be checked for completeness and accuracy. Passenger survey results and passenger count data will be uploaded to a different database, and these data will be checked for completeness and accuracy.

Product of Task 3

Processed ridecheck, passenger survey, and passenger count data

Task 4 Estimate Passenger-Miles Traveled and Unlinked Trips***Subtask 4.1 Estimate Passenger-Miles Traveled and Unlinked Trips for Directly Operated Services***

For the MBTA's directly operated bus and rapid-bus modes, CTPS will select some bus trips that have APC-equipped buses to conduct passenger counts for use in APC data verification. CTPS will then provide the results of these counts to the MBTA as reports of vehicle passenger loads and trip summary statistics. The MBTA will use these CTPS-produced results to estimate passenger-miles traveled and unlinked passenger trips. CTPS will then assess the MBTA's estimates of passenger-miles traveled and unlinked passenger trips.

CTPS will obtain AFC faregate passenger counts from the MBTA, which will provide information about the total number of passengers boarding at gated stations on the heavy and light rail, and on rapid-buses. CTPS will then estimate the factors that account for the number of transfers between modes based on the origin-destination passenger surveys conducted in Task 2. In addition, CTPS will develop a faregate noninteraction factor from the observations at station survey locations and will apply the factor to the AFC faregate counts to estimate the total number of unlinked heavy rail and light rail trips.

For light rail surface stops, CTPS will use counts of boarding passengers who do not interact with the farebox to develop a farebox noninteraction factor. CTPS will apply this factor to the AFC farebox counts of the total number of passengers on surface light rail. CTPS will then apply additional factors to account for transfers made to other light rail or heavy rail lines, which will generate estimates of the total of unlinked light rail and heavy rail riders attributable to light rail surface boardings. These transfer factors will be derived from the origin-destination passenger surveys.

For the heavy rail and light rail modes, CTPS will convert the origin-destination data generated by the passenger surveys and the processed AFC data into estimates of the average passenger-miles traveled per transit mode. The average passenger-miles traveled per passenger will be multiplied by the total number of passengers to yield estimates of the total number of passenger-miles traveled for each mode.

If the MBTA decides to use ODX as the basis of reporting to the NTD, CTPS will adjust the methodology as needed to incorporate the ODX outputs.

For the commuter rail mode, CTPS will use one or more of the sources of ridership counts described in Task 1 as the basis for estimating unlinked passenger trips. In recent years, because conductor audit data were not available, CTPS obtained anonymized origin-destination data from the MBTA's mobile-ticketing vendor. That dataset was sufficient for estimating the average passenger-miles traveled per trip. In addition, CTPS will examine Keolis's passenger counts; this dataset should also be sufficient for calculating the average passenger-miles traveled per trip. However, CTPS does not produce estimates of unlinked passenger trips or total passenger-miles traveled for commuter rail, and CTPS does not expect to conduct any direct observations of the commuter rail mode.

For the ferry mode, CTPS will assist the MBTA in reviewing ridership counts provided by the ferry vendor. However, CTPS does not produce estimates of unlinked passenger trips or total passenger-miles traveled for ferries, and CTPS does not plan to conduct any direct observations of the ferry mode.

For temporary bus-bridge service, CTPS will obtain AFC faregate passenger counts from the MBTA for comparable periods with regular rail service and use counts of temporary bus-bridge boardings or alightings to develop a bus-bridge scaling factor. CTPS will use AFC counts and the scaling factor to estimate unlinked passenger trips and passenger-miles traveled on temporary bus-bridge service.

Subtask 4.2 Estimate Passenger-Miles Traveled and Unlinked Trips for Purchased-Service Bus Mode

For the purchased-service bus mode, CTPS will produce estimates of passenger-miles traveled and unlinked trips using revenue data from the MBTA for routes that are not equipped with APC and output from CTPS's database of bus ridership. CTPS will generate estimates of the average farebox deposit and will then estimate the average trip length per passenger based on ridecheck observations.

The total unlinked trips will be estimated by dividing the average farebox deposit by the total revenue. The total passenger-miles traveled will be calculated by multiplying the total unlinked trips by the average trip length per passenger. The MBTA will use APC data to produce estimates of passenger-miles traveled and unlinked trips on APC-equipped routes. CTPS will combine the results from APC-equipped routes and routes without APCs into a single set of values for the purchased-service bus mode.

Product of Task 4

Estimates of passenger-miles traveled and unlinked trips, including a summary by service day of week, for all MBTA modes except commuter rail and ferry

Task 5 Document Results

CTPS will document the results of Task 4 and the methodology of the study in four technical memoranda: one for the purchased-service bus mode, one for directly operated services, one for the commuter rail mode, and one for temporary bus-bridge service. The technical memoranda will describe the data-collection and analysis processes and present a summary of the results. In addition, CTPS will document the results of Task 4 in a summary table presenting the data for the MBTA's directly operated modes by the service day of week. The MBTA has requested that CTPS transmit a draft copy of the memoranda and table by October 15, 2024, and a final version by October 31, 2024.

Products of Task 5

Four technical memoranda and one table

Task 6 Assist with the Compliance Audit

The FTA requires that an independent auditor review and verify the MBTA's estimates of passenger-miles traveled and unlinked trips. As the agency responsible for these estimates, CTPS will provide materials and assistance necessary for the audit.

Products of Task 6

Materials and assistance necessary to the independent auditor

Exhibit 1
ESTIMATED SCHEDULE
MBTA SFY 2024 National Transit Database: Data Collection and Analysis

Task	Month																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
1. Develop Sampling Plans																		
2. Collect Data																		
3. Process Ridecheck, Passenger Survey, and Passenger Count Data																		
4. Estimate Passenger-Miles Traveled and Unlinked Trips																		
5. Document Results																		
6. Assist with the Compliance Audit																		

Products/Milestones

A: Four technical memoranda and one table

Exhibit 2
ESTIMATED COST
MBTA SFY 2024 National Transit Database: Data Collection and Analysis

Direct Salary and Overhead	\$204,482
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Task	Person-Weeks					Direct Salary	Overhead (119.34%)	Total Cost
	M-1	P-3	P-2	Temp	Total			
1. Develop Sampling Plans	0.0	1.0	0.0	0.0	1.0	\$1,352	\$1,613	\$2,965
2. Collect Data	4.0	0.0	0.0	64.0	68.0	\$57,578	\$68,713	\$126,291
3. Process Ridecheck, Passenger Survey, and Passenger Count Data	0.0	15.0	3.0	0.0	18.0	\$24,335	\$29,041	\$53,375
4. Estimate Passenger-Miles Traveled and Unlinked Trips	0.0	3.0	1.0	0.0	4.0	\$5,344	\$6,378	\$11,722
5. Document Results	1.0	1.0	0.0	0.0	2.0	\$3,266	\$3,898	\$7,164
6. Assist with the Compliance Audit	0.0	1.0	0.0	0.0	1.0	\$1,352	\$1,613	\$2,965
Total	5.0	21.0	4.0	64.0	94.0	\$93,227	\$111,257	\$204,482

Other Direct Costs	\$300
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Travel	\$300
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TOTAL COST	\$204,782
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Funding
 Future MBTA Contract

The Boston Region Metropolitan Planning Organization (MPO) operates its programs, services, and activities in compliance with federal nondiscrimination laws including Title VI of the Civil Rights Act of 1964 (Title VI), the Civil Rights Restoration Act of 1987, and related statutes and regulations. Title VI prohibits discrimination in federally assisted programs and requires that no person in the United States of America shall, on the grounds of race, color, or national origin (including limited English proficiency), be excluded from participation in, denied the benefits of, or be otherwise subjected to discrimination under any program or activity that receives federal assistance. Related federal nondiscrimination laws administered by the Federal Highway Administration, Federal Transit Administration, or both, prohibit discrimination on the basis of age, sex, and disability. The Boston Region MPO considers these protected populations in its Title VI Programs, consistent with federal interpretation and administration. In addition, the Boston Region MPO provides meaningful access to its programs, services, and activities to individuals with limited English proficiency, in compliance with U.S. Department of Transportation policy and guidance on federal Executive Order 13166.

The Boston Region MPO also complies with the Massachusetts Public Accommodation Law, M.G.L. c 272 sections 92a, 98, 98a, which prohibits making any distinction, discrimination, or restriction in admission to, or treatment in a place of public accommodation based on race, color, religious creed, national origin, sex, sexual orientation, disability, or ancestry. Likewise, the Boston Region MPO complies with the Governor's Executive Order 526, section 4, which requires that all programs, activities, and services provided, performed, licensed, chartered, funded, regulated, or contracted for by the state shall be conducted without unlawful discrimination based on race, color, age, gender, ethnicity, sexual orientation, gender identity or expression, religion, creed, ancestry, national origin, disability, veteran's status (including Vietnam-era veterans), or background.

A complaint form and additional information can be obtained by contacting the MPO or at http://www.bostonmpo.org/mpo_non_discrimination. To request this information in a different language or in an accessible format, please contact

Title VI Specialist
Boston Region MPO
10 Park Plaza, Suite 2150
Boston, MA 02116
civilrights@ctps.org

By Telephone:

857.702.3700 (voice)

For people with hearing or speaking difficulties, connect through the state MassRelay service:

- **Relay Using TTY or Hearing Carry-over:** 800.439.2370
- **Relay Using Voice Carry-over:** 866.887.6619
- **Relay Using Text to Speech:** 866.645.9870

For more information, including numbers for Spanish speakers, visit <https://www.mass.gov/massrelay>.