



CITY OF CORONADO

CITY COUNCIL STAFF REPORT

November 5, 2024

{{section.number}}b

REPORT ON THE 2024 FREE SUMMER SHUTTLE AND MINI ELECTRIC SHUTTLE PROGRAMS

RECOMMENDATION:

Receive report and provide direction as appropriate.

BACKGROUND:

The City of Coronado has provided free public transportation during the summer since it launched the Free Summer Shuttle program in 2013. The service was temporarily suspended in 2020 due to the COVID-19 pandemic and ridership has remained below historic averages in subsequent years. Based on data provided by MTS, ridership declined again in 2023 and averaged only 4.7 riders per trip, the lowest since the program's first year of service.

Although there were external factors that likely contributed to decreased ridership data in 2023, including the MTS drivers' strike, resultant lack of marketing and driver training, and suspected passenger undercounts, total ridership was substantially below pre-pandemic levels.

Consequently, the City Council elected to make a number of changes to the City's public transportation services for 2024, including abbreviating the Free Summer Shuttle schedule and initiating a six-month pilot program with Circuit Transit, Inc. (Circuit) to operate a fleet of electric mini shuttles and passenger vans to provide free door-to-door transportation for residents and visitors, also known as the Island Express.

ANALYSIS:

The Free Summer Shuttle operated between July 1 and September 2 for a total of 64 service days in 2024. In prior years, the Summer Shuttle typically ran between Memorial Day weekend and Labor Day, or approximately five weeks longer than 2024. In addition, the new free electric mini shuttle program began service on June 4 and will continue to operate until December 4, 2024.

The simultaneous operations of the Summer Shuttle and free electric mini shuttle programs present challenges when comparing ridership data with past years. While it is assumed that the two transportation services largely compete from the same pool of potential passengers, it is unknown how many people would still have used free public transportation if their chosen option was not available. Consequently, the Summer Shuttle ridership data, even when adjusted for the abbreviated 2024 schedule, is not an apples-to-apples comparison to past years due to the potential competition posed by the Island Express for riders.

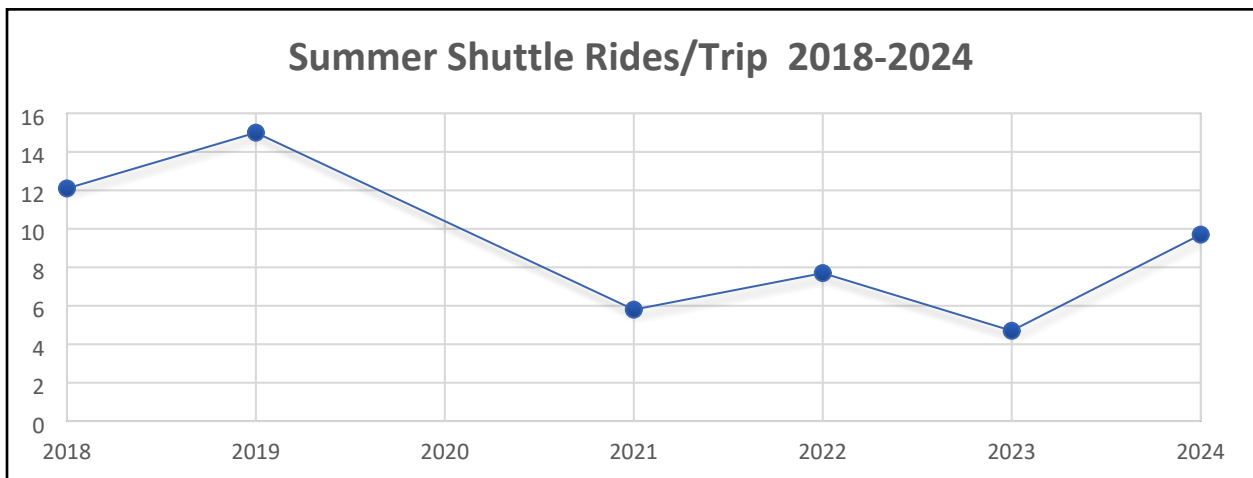
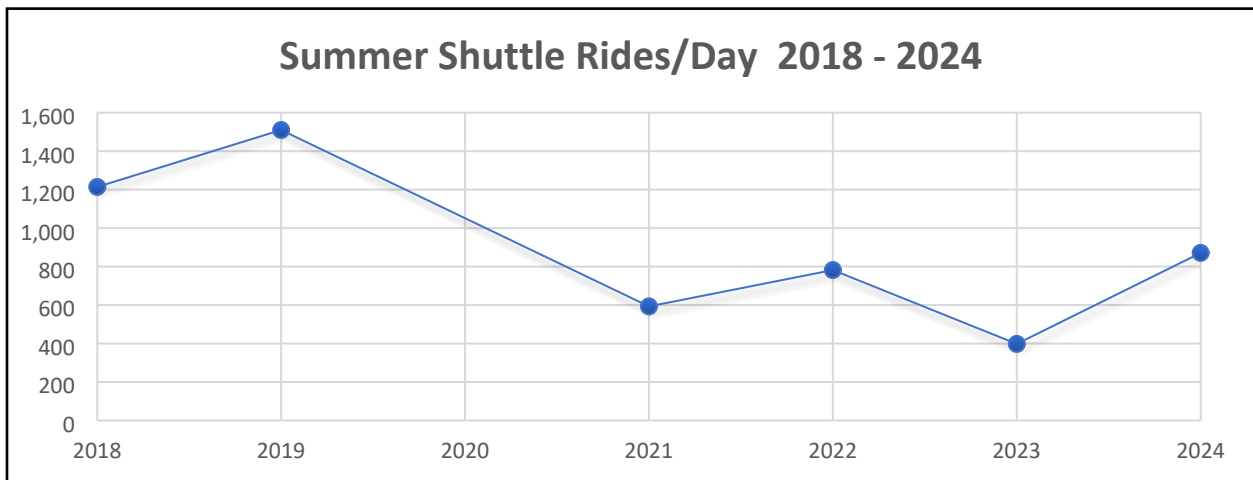
SUMMER SHUTTLE

As previously noted, the Free Summer Shuttle operated for 64 days in 2024, approximately five weeks less than prior years. Service hours were also reduced in 2024 by ending daily service at 8:00pm instead of 9:30pm M-F and 10:30pm Sa-Su. Consistent with past years, the Summer Shuttle operated with 15-minute headways.

Summer Shuttle Ridership Summary

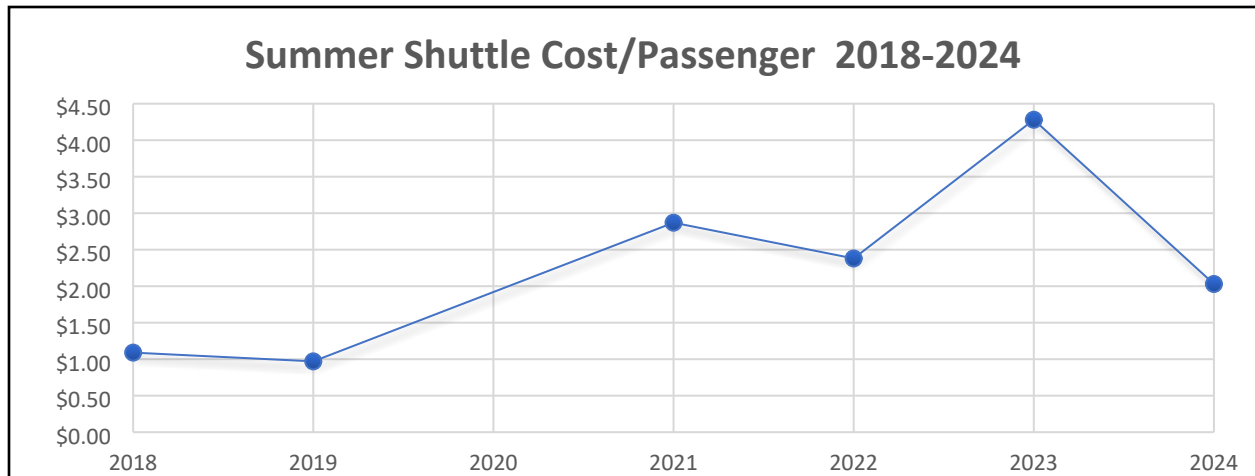
Despite the abbreviated operating schedule and introduction of the free electric mini shuttle program, the 2024 Summer Shuttle served 55,744 total passengers in its two months of service, more than double the number of passengers per day than in 2023 and the highest number of daily riders since the 2020 pandemic. The number of passengers per trip showed a similar, but slightly higher improvement.

| Year | Service Days | Total Riders | Rides/Day | Change Year/Year |
|------|--------------|--------------|-----------|------------------|
| 2018 | 102 | 123,846 | 1,214 | - |
| 2019 | 102 | 154,026 | 1,510 | +20% |
| 2021 | 93 | 55,103 | 593 | -61% |
| 2022 | 102 | 79,741 | 782 | +24% |
| 2023 | 86 | 34,248 | 398 | -49% |
| 2024 | 64 | 55,744 | 871 | +54% |



Summer Shuttle Costs

The City's cost for providing the Summer Shuttle was also reduced from \$146,586 in 2023 to \$113,398 in 2024. This cost reduction, combined with increased daily ridership, resulted in the City's cost per passenger to drop from \$4.28 in 2023 to \$2.03 in 2024.



While the Summer Shuttle did not include daily operation to the Coronado Cays area, the City purchased 100 Pronto passes for use by Cays residents at a cost of \$700, and all passes were used. The City also provided an extension of the Summer Shuttle to the Cays on the 4th of July, which operated at 30 minutes headways between 7:30am and 11:00pm, the same schedule that was provided in 2022 and 2023. A total of 717 passengers rode the Cays shuttle over 65 trips on July 4, for an average of 11 passengers per trip. This number is down slightly from 2022 and 2023, at 14.5 and 12.5 passengers per trip, respectively, in those years.

Summer Shuttle User Survey Results

A non-scientific survey was conducted of Summer Shuttle passengers after they used the service. A total of 71 unique users submitted responses. A complete breakdown of survey results is included in Attachment 2 and a summary of key questions and responses is provided below:

- 78% of users responded that they were very satisfied with the service. Approximately 4% reported that they were unsatisfied.
- 79% reported that they were from Coronado and 15% were from outside San Diego County.
- 90% responded that their wait times were 15 minutes or less.
- 54% used the service for recreation/leisure purposes, 15% for dining, and only 3% for work.
- 34% of survey respondents (24 total) answered how they would have travelled if not for the Summer Shuttle. Of these, the majority responses were driving their car at 46% and walk at 38%.

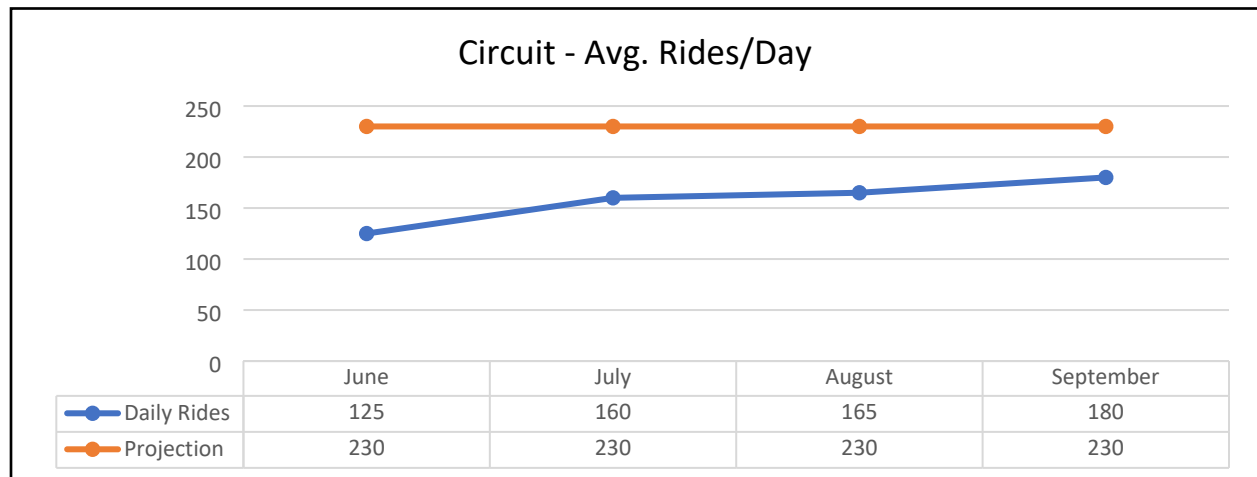
THE ISLAND EXPRESS ELECTRIC MINI SHUTTLE PROGRAM

The City launched a six-month electric mini shuttle pilot program on June 4, 2024. The service provides free door-to-door transportation for residents and visitors to travel within the Village and Coronado Cays. The service runs between 10am and 9pm Su-Th and 9am and 10pm Fri-Sat. The service relies on six electric mini shuttles in the Village and two eight-seat electric passenger vans in the Cays.

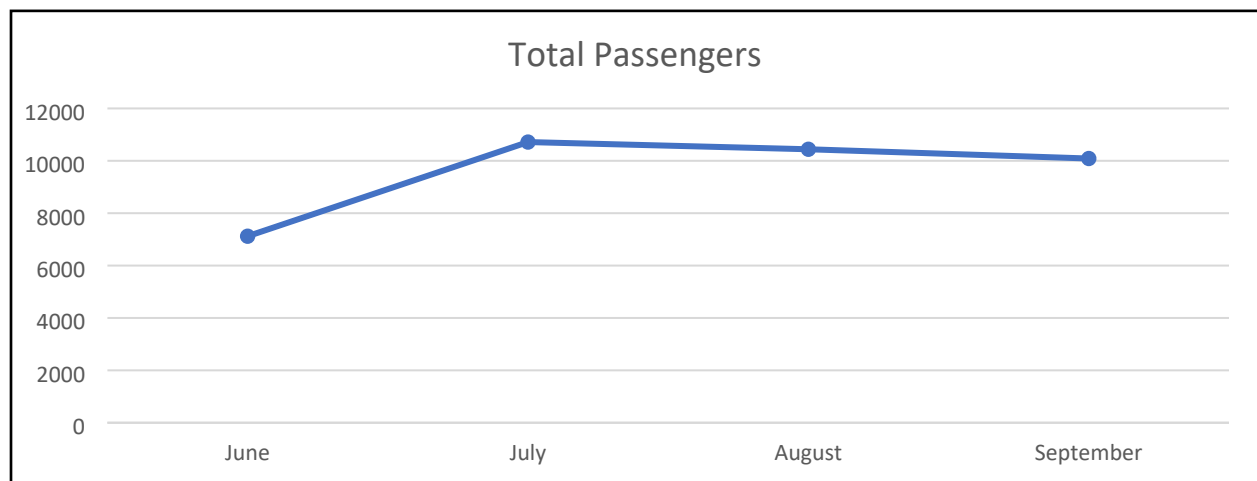
The City entered into a contract with Circuit, Inc. to operate the electric mini shuttle pilot program for a not-to-exceed cost of \$628,295.50. The contract and the six-month pilot program are scheduled to conclude on December 4, 2024.

Island Express Ridership Summary

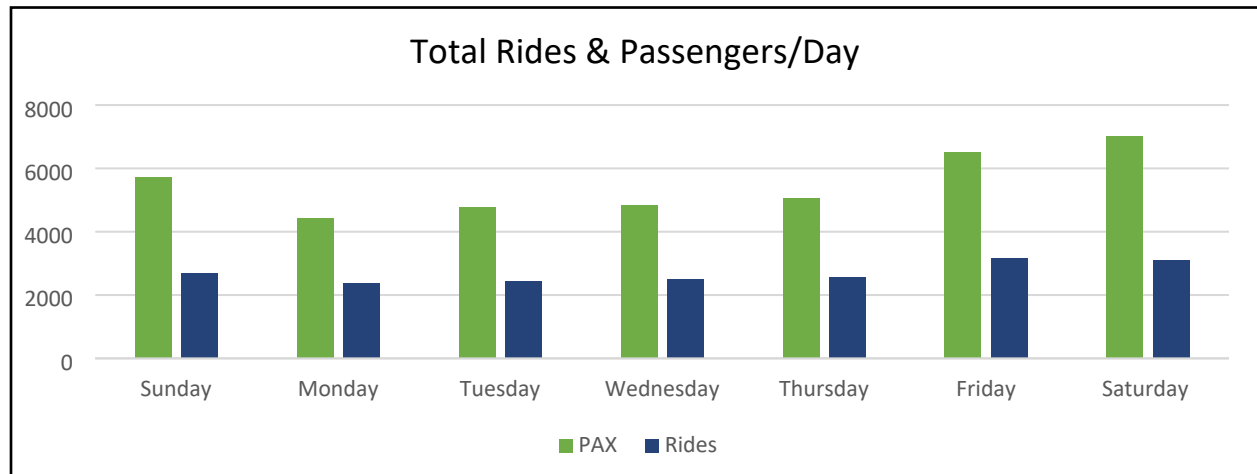
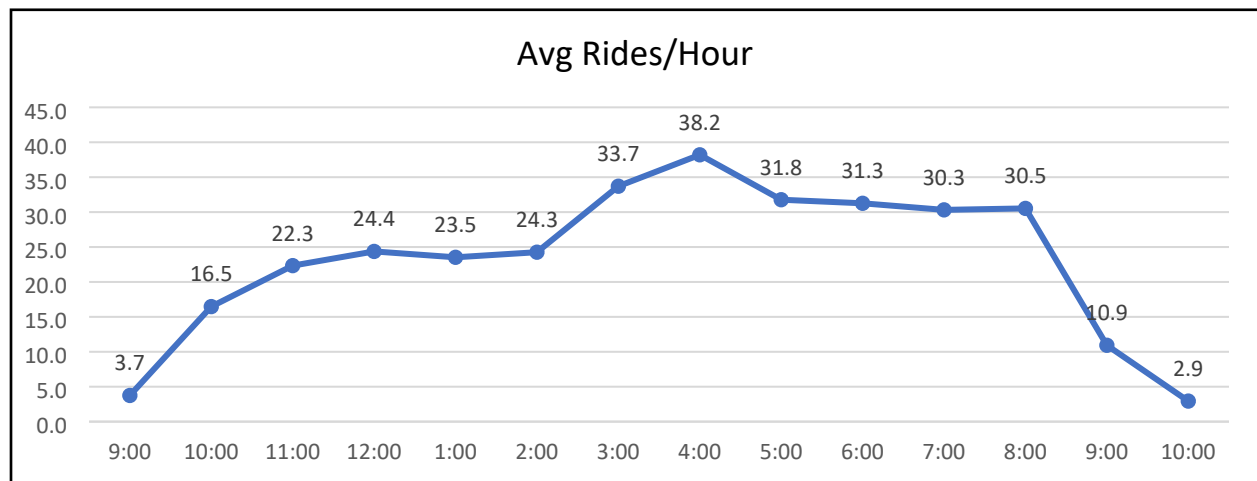
In their September 5, 2023, presentation to the City Council, Circuit estimated that the service would provide approximately 50,000+ rides over the six-month pilot, for an average of 230 rides per day. Based on data supplied by Circuit, a total of 18,818 trips, providing rides for 38,366 passengers, were provided between June 4 and September 30. Daily ridership increased every month since the service began with a peak of 180 rides/day in September; however, the monthly average of 158 rides/day over the first four months of service is approximately 31% lower than initial projections.



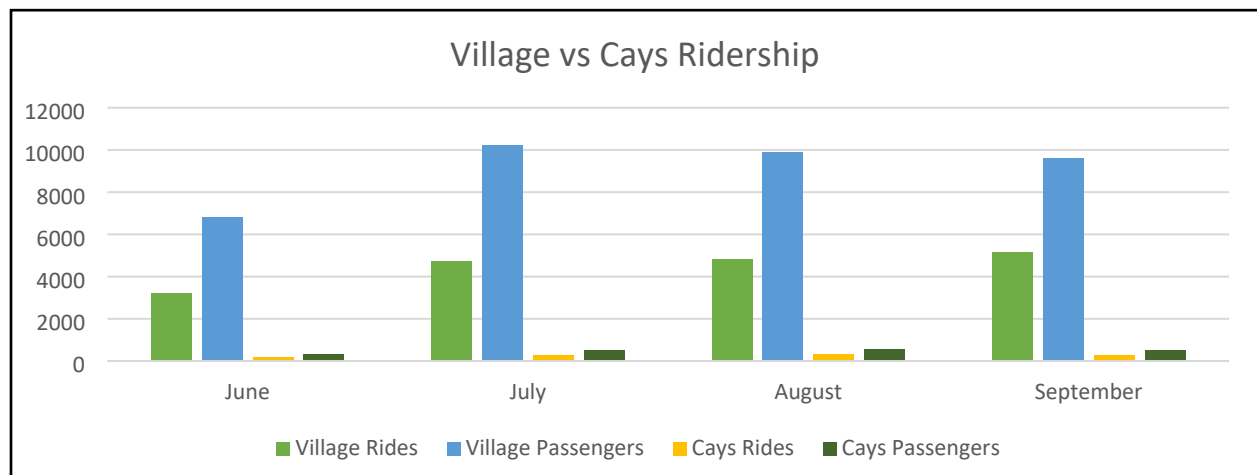
The service provided rides for a total of 38,366 passengers in the first four months, for an average of 2.04 passengers per ride. July was the peak month with 10,716 total passengers with monthly numbers dropping slightly to 10,441 and 10,088 in August and September, respectively.



The service has been busiest between 3:00 pm and 8:00 pm, with substantially lower ridership between 9:00 am and 11:00 and after 8:00 pm. Daily ridership has generally peaked during the weekends with relatively consistent usage during the week.

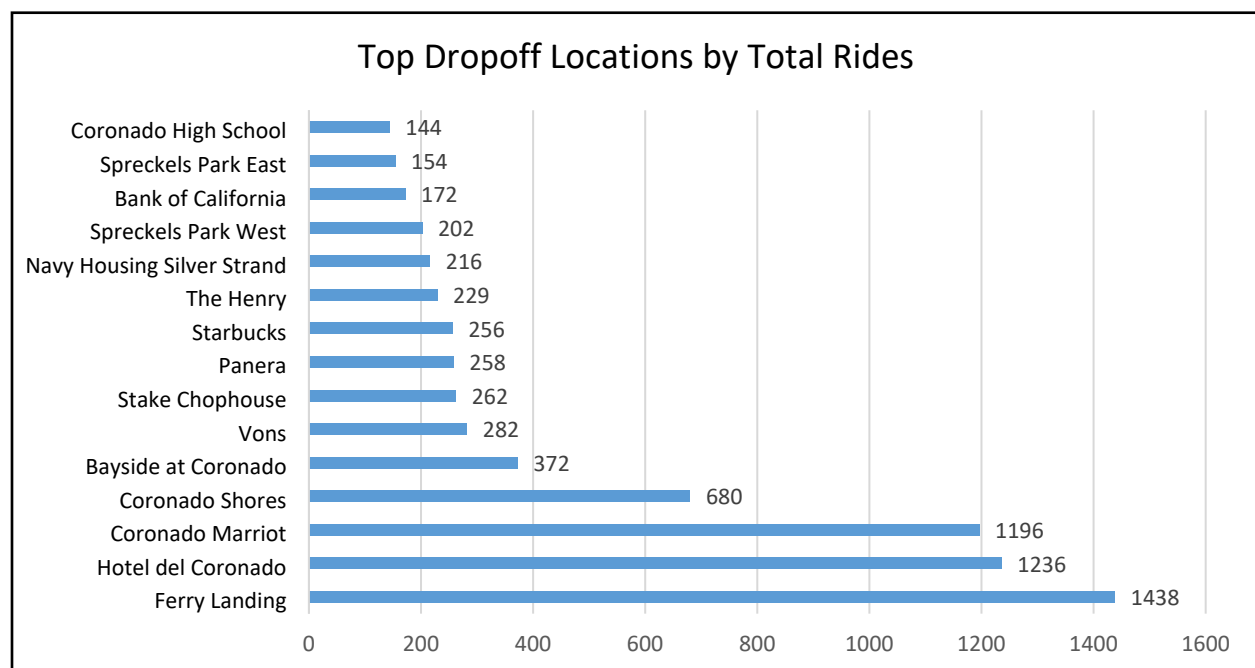
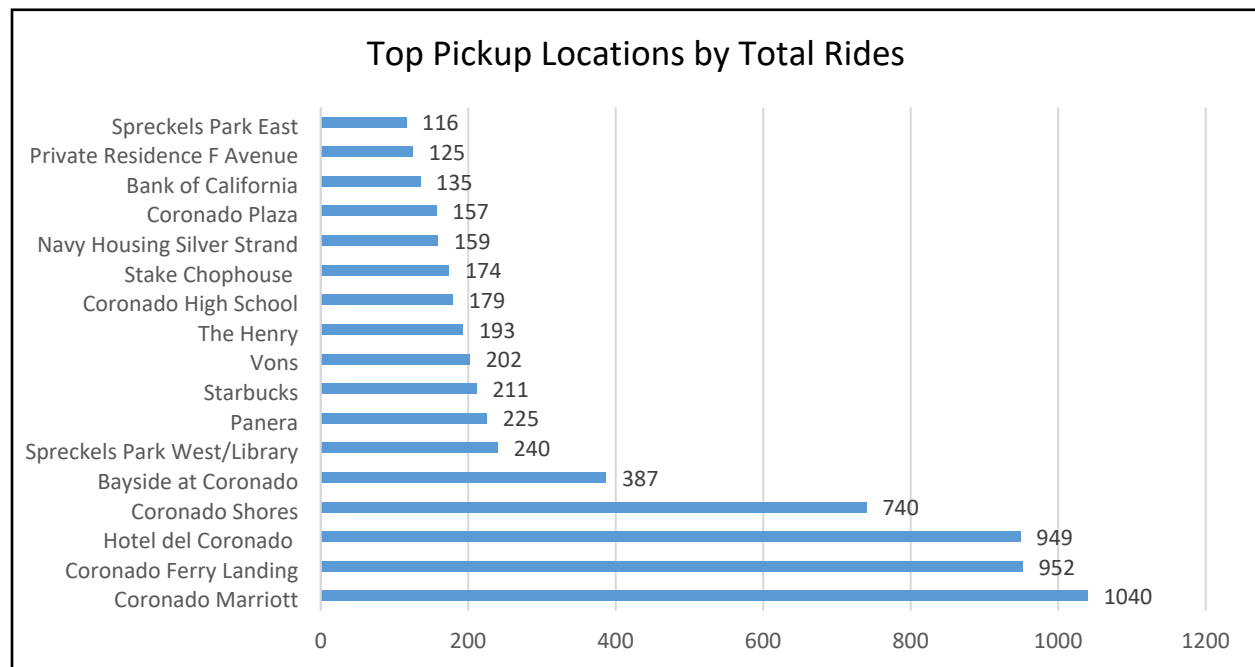


Approximately 95% of the total rides and passengers served occurred within Coronado Village. Ridership in the Cays peaked in August with 305 total rides providing service to 541 passengers.



Island Express Top Pickup and Dropoff Locations

The most popular origin and destination locations for the mini shuttle service has been the Marriott, the Ferry Landing, Hotel del Coronado, and Coronado Shores.



Island Express Wait Times

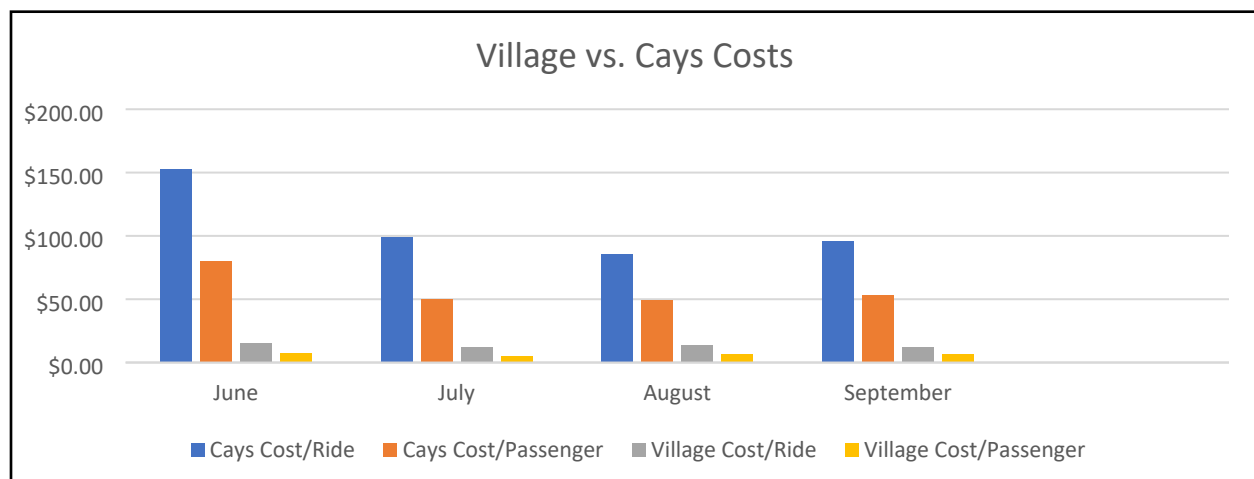
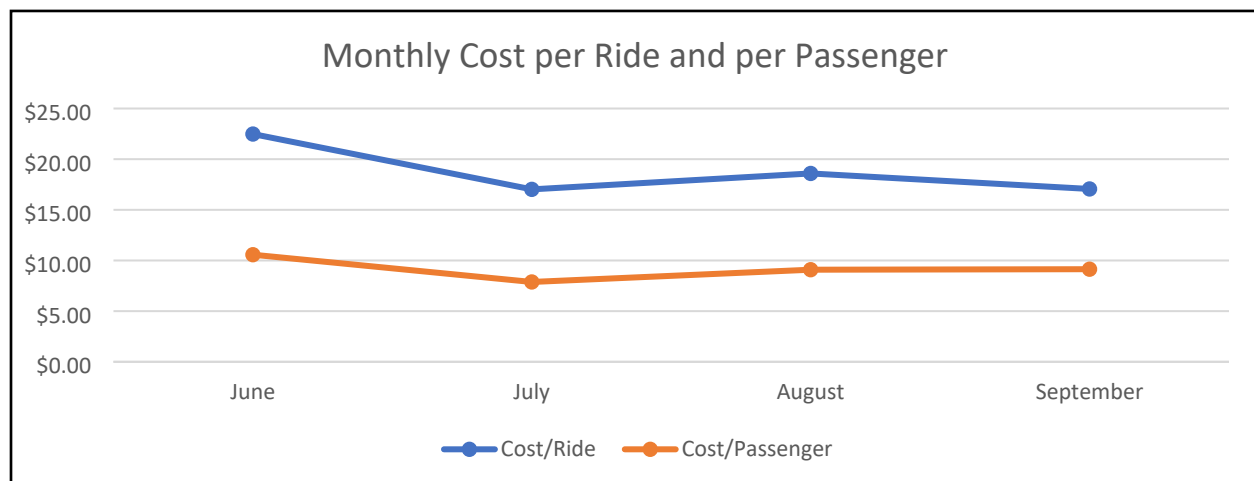
Circuit set a goal of providing a ride within 10 minutes after service has been ordered. According to their data, wait times have ranged from a high of 11.2 minutes in June to a low of 8.8 minutes in September. The average wait time over the first four months of service was 9.9 minutes. Average wait times only account for completed rides and exclude all cancelled rides, including

those that that were cancelled because of long wait times. Additionally, wait time data does not include rides provided to users who hail vehicles directly from the street and without using the app. It is unknown how inclusion of this countervailing data would affect average wait times.

Island Express Costs

The City has paid Circuit a total of \$346,793 to operate the Electric Mini Shuttle Service during its first four months of service, or approximately \$86,698/month on average. The City's monthly cost per ride ranged from a high of \$22.48 in June to a low of \$17.02 in July while the per passenger cost peaked at \$10.57 in June and dropped to a low of \$7.88/passenger in July.

Lower ridership in the Cays, coupled with the increased cost of providing electric transit vans, resulted in the City paying between an average of \$86.30/ride to/from the Cays in August to \$152.73/ride in June. The City's cost per passenger ranged from a low of \$48.66 in August to a high of \$79.93 in June.



Call Center

The City's contract with Circuit included a provision of a call center for residents and visitors to order rides by a phone call rather than using the Circuit app. The call center costs the City \$2,268/month, or \$13,608 for the six-month pilot program. During the first four months of service, a total of 145 rides, or an average of 36/month, have been provided through the call center. Accordingly, the City has paid approximately \$62.57/ride ordered from the call center.

Island Express Survey Results

Users of the mini shuttle program were invited to complete a non-scientific survey after they used the service. A total of 526 unique users submitted responses. Of these respondents, 57% stated Coronado residency, 31% from out of state, 4% from elsewhere in California and 7% from San Diego County. 2% of respondents were from the United Kingdom or provided an invalid zip code. A complete breakdown of survey results is included in Attachment 2 and a summary of key questions and responses is provided below:

- 86% of users responded that they were very satisfied with the service. Less than 5% of respondents reported an unsatisfactory experience.
- 75% of respondents said they would pay a small fee to use the service. The survey did not ask how much users would be willing to pay.
- 96% reported that they either felt safe or very safe using the service.
- The most common reported destination for users was “leisure” at 46%, followed by “dining” at 27%, and “other” at 8%. Only 4% reported using the service for work or business.
- 74% of respondents reported a 10-minute or less wait time, 16% between 10-15 minutes, and 6% reported a greater than 20 wait time.
- When asked how they would have travelled if the mini shuttle program were not available, 32% responded that they would have driven their car; 38% said they would have walked, biked, or rode a scooter; and 30% said “other”.

Survey respondents were also encouraged to provide other comments. Some of the common themes were appreciation for the service and its convenience, commendations of shuttle drivers, and complaints about long wait times, cancelled rides, or difficulties with the Circuit app.

Island Express Greenhouse Gas (GHG) Reduction

The City’s adopted Climate Action Plan (CAP) included the electric mini shuttle program as a GHG reduction measure and estimated that implementation of the program could result in an annual reduction of nine metric tons of GHG emissions by eliminating 30,010 vehicle miles travelled with traditional gas-powered cars. A nine metric ton reduction in GHG emissions represents approximately .02% of the City’s overall 2030 GHG reduction target of 47,319 metric tons. By comparison, a 10-kilowatt residential rooftop solar system can save up to four metric tons of GHG emissions per year. A typical 10-kilowatt residential rooftop solar system provides enough power for a 2,000-square-foot home in the United States.

According to Circuit, the electric mini shuttle program has resulted in 17.36 metric tons of GHG savings through the first four months of service; however, it appears Circuit’s formula assumes that 100% of all rides displaced a trip by a gas-powered vehicle and also is based on the total number of miles driven by each shuttle while in service (e.g., total miles include cancelled and unfulfilled trips, and driving miles to pick up or staging locations) and not just the shuttle ride distance that could have displaced a car trip. If 32% of passengers would have driven their car as indicated by the City’s survey results rather than 100% as modeled by Circuit, GHG savings would be reduced to approximately 5.55 metric tons. This number may be further reduced depending on an accurate calibration of actual vehicle miles travelled while transporting passengers vs cumulative miles driven.

Island Express Traffic Reduction

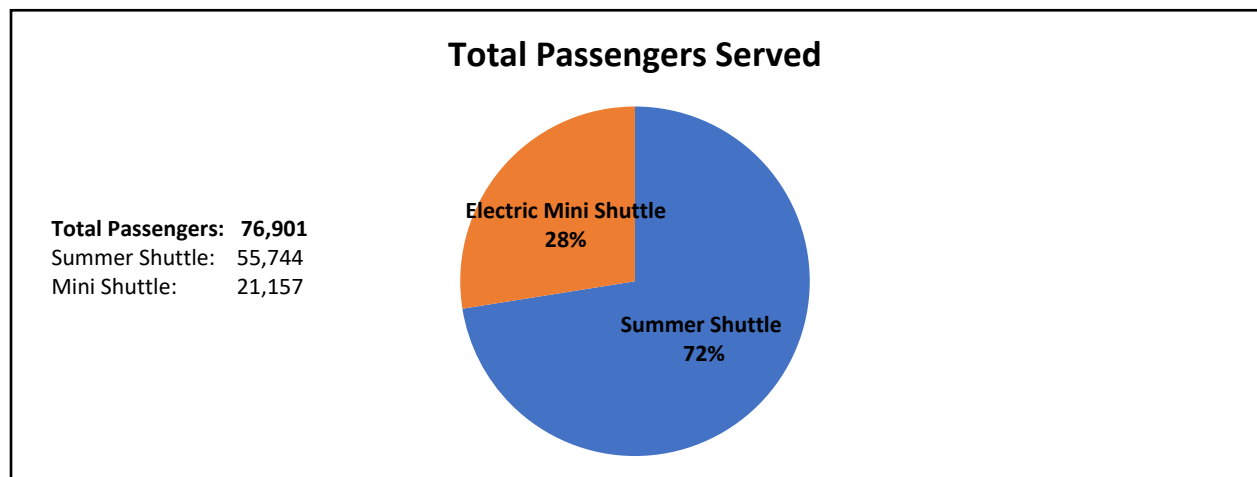
During its first four months of service, the electric mini shuttle program provided 18,818 total rides. Although there is no way to know with certainty how passengers would have travelled if not for the mini shuttle program, 32% of survey respondents indicated they would have driven their car. If that data is representative of actual user behavior, approximately 6,022 traditional vehicle trips would have been displaced by the mini shuttle program. Replacing traditional vehicle trips with mini shuttle trips, however, does not remove trips from the road or reduce overall traffic volume. Moreover, it is possible that the service adds traffic by providing a free transportation option to people who might otherwise walk or bike to their destination.

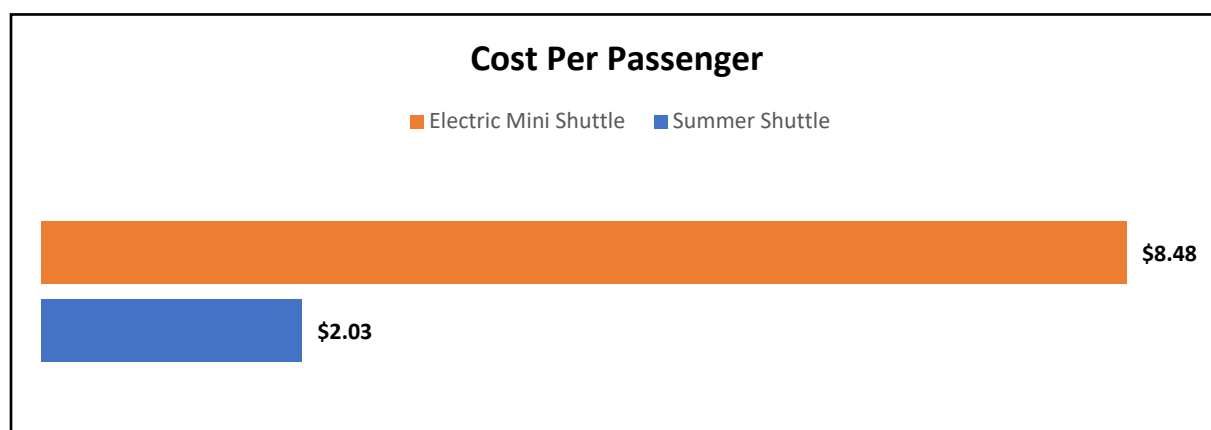
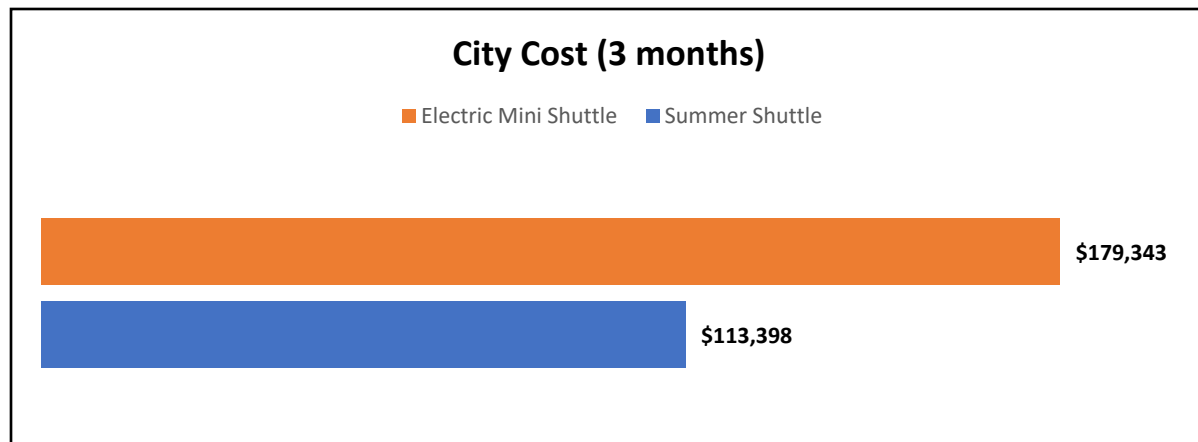
Island Express Effect on Parking

A number of survey respondents noted that they liked using the mini shuttle program because they didn't need to worry about parking in the Village. It is assumed that the program resulted in some reduction in parking demand; however, there is no way to quantify the impact and there did not appear to be a marked increase in parking supply since the shuttles began operating.

SUMMER SHUTTLE AND ELECTRIC MINI SHUTTLE PROGRAM COMPARISON

The Summer Shuttle and Electric Mini Shuttle Programs operated concurrently between July 1 – September 2, 2024, although the Summer Shuttle started and ended an hour earlier Sunday-Thursday and ended two hours earlier on Fridays and Saturdays. As shown in the charts below, the Summer Shuttle served 72% of all free public transportation passengers during this time at a cost of \$2.03/passenger, whereas the mini shuttle program served 28% of total passengers at a cost of \$8.48/passenger.





NEXT STEPS

This report is presented to share the results of the full 2024 Summer Shuttle season and partial Island Express season (June-September). The Island Express pilot program expires December 4, 2024. After the conclusion of the pilot program, staff will compile and present results of the full six months of operations.

Staff does not need express direction at this time but the City Council could consider and provide direction on future possibilities of continuing, discontinuing or modifying either service:

- The Summer Shuttle contract is typically brought to the City Council in the spring for approval, and Council could give staff feedback on the results of the 2024 season and interest in program changes that could be negotiated in the intervening months. Staff noted that 2024 had the highest ridership of the past four years but still did not achieve pre-pandemic levels. The truncated season appears to have balanced ridership and cost.
- The City does not have full data on the Island Express but the City Council could similarly provide feedback and direction on the program outcomes to date and interest in extending, modifying or discontinuing the mini shuttle program. Staff note factors such as the heavy usage of the shuttle to and from visitor-serving locations, the high cost, and the high satisfaction results from the survey. If the City Council had interest in pursuing a

permanent year-round or seasonal shuttle, it is recommended that the full program data be assessed, as well as opportunities for grants, external funding and partnerships to offset City costs, exploration of a ridership fee for users, and development of a Request for Proposal.

FISCAL IMPACT:

\$628,295 has been appropriated for the six-month electric mini shuttle program and \$114,098 for the Summer Shuttle program, including \$700 for 100 Pronto passes for Cays residents. Adequate funds are available in the City's adopted 2024-25 budget.

ALTERNATIVE:

None.

CALIFORNIA ENVIRONMENTAL QUALITY ACT:

This report is not a project as defined by CEQA and is therefore exempt from environmental review.

PUBLIC NOTICE:

No notice required.

ATTACHMENTS:

1. Summer Shuttle Ridership and Cost Summary
2. Summer Shuttle User Survey Results
3. Island Express Ridership and Cost Summary
4. Island Express User Survey Results

Submitted By: Community Development Department / Richard Grunow