



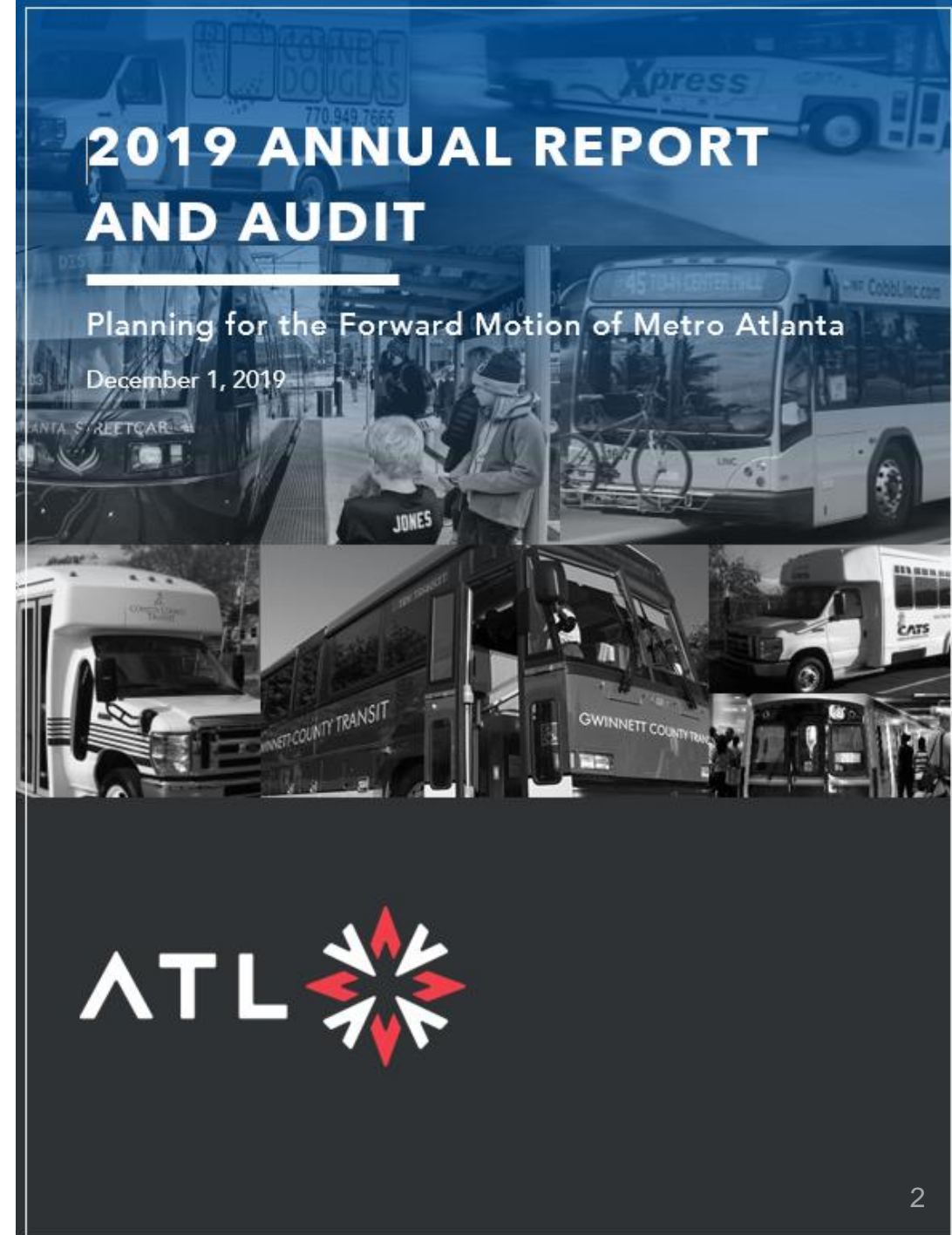
## **ATL Annual Report and Audit**

Lori Sand

November 14, 2019

# ATL ANNUAL REPORT AND AUDIT

- ▶ Annual Report and Audit of nine of the transit systems operating in the ATL's 13-county region
- ▶ Initial report includes data for the last five years (2015 to 2019) on transit planning, investments, and operations
- ▶ Report focuses on performance, particularly from a regional perspective
- ▶ Final report due to the legislature on **December 1, 2019**





# **Key Performance Indicators**

## ANALYSIS OF KEY PERFORMANCE INDICATORS (KPIs)

- ▶ Develops a baseline for future comparison
- ▶ Starting point to provide recommendations for improvements or future investments in the region
- ▶ Enables benchmarking to compare Atlanta to peer regions

Ridership

Operational Productivity

Level of Transit Investment

Customer Satisfaction

On-Time Performance

Financial Productivity

Equity

State of Good Repair

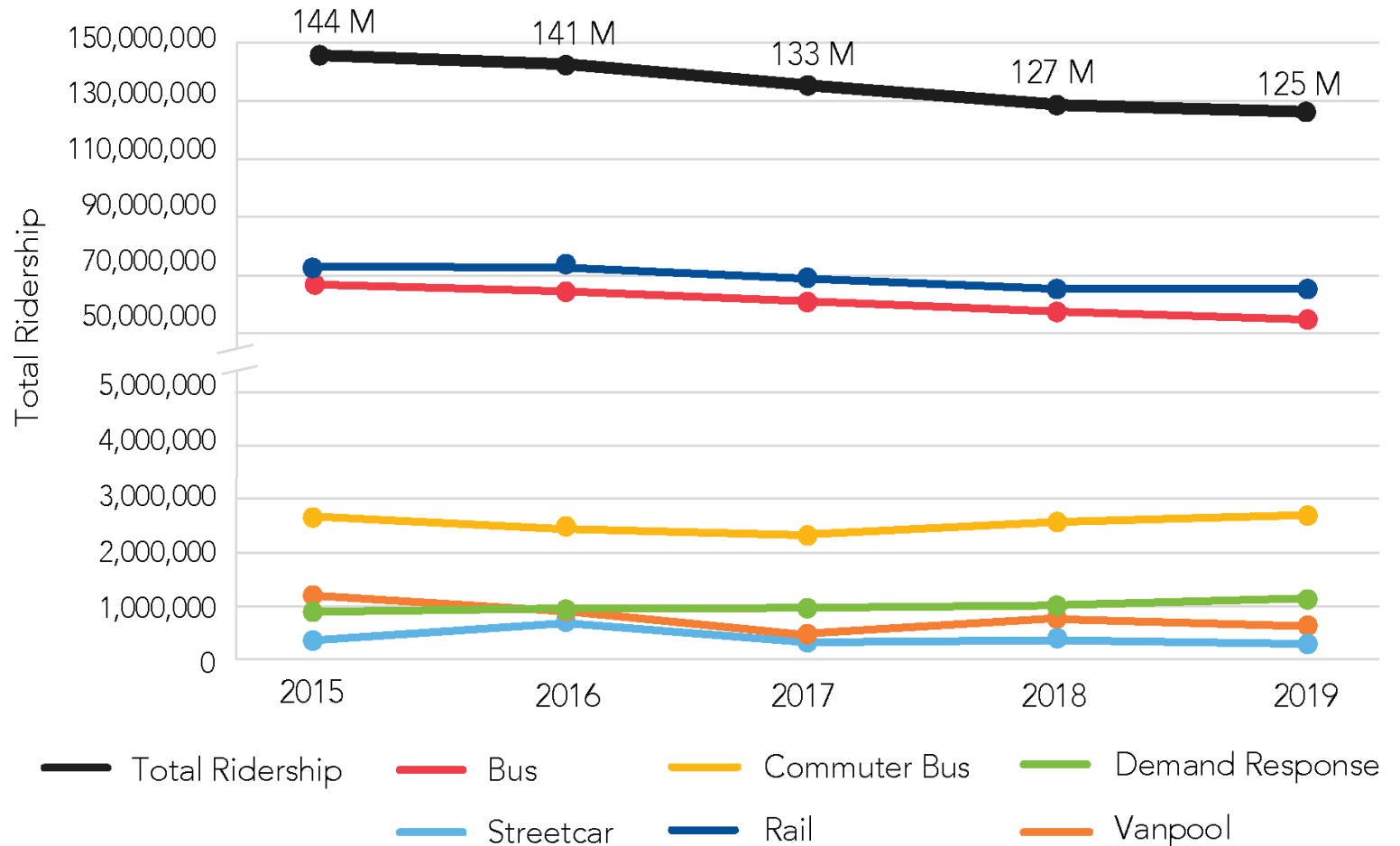
Level of Service

Safety

# RIDERSHIP

- ▶ Total transit ridership in the region peaked in 2015 with 144 million trips, declining to 125 million by 2019.
- ▶ Rail, bus, and vanpool saw losses; however, rail ridership was steady between 2018 and 2019.
- ▶ Commuter bus and demand response ridership remained steady or increased.
- ▶ Despite ridership declines, agencies have slightly increased the amount of service provided.

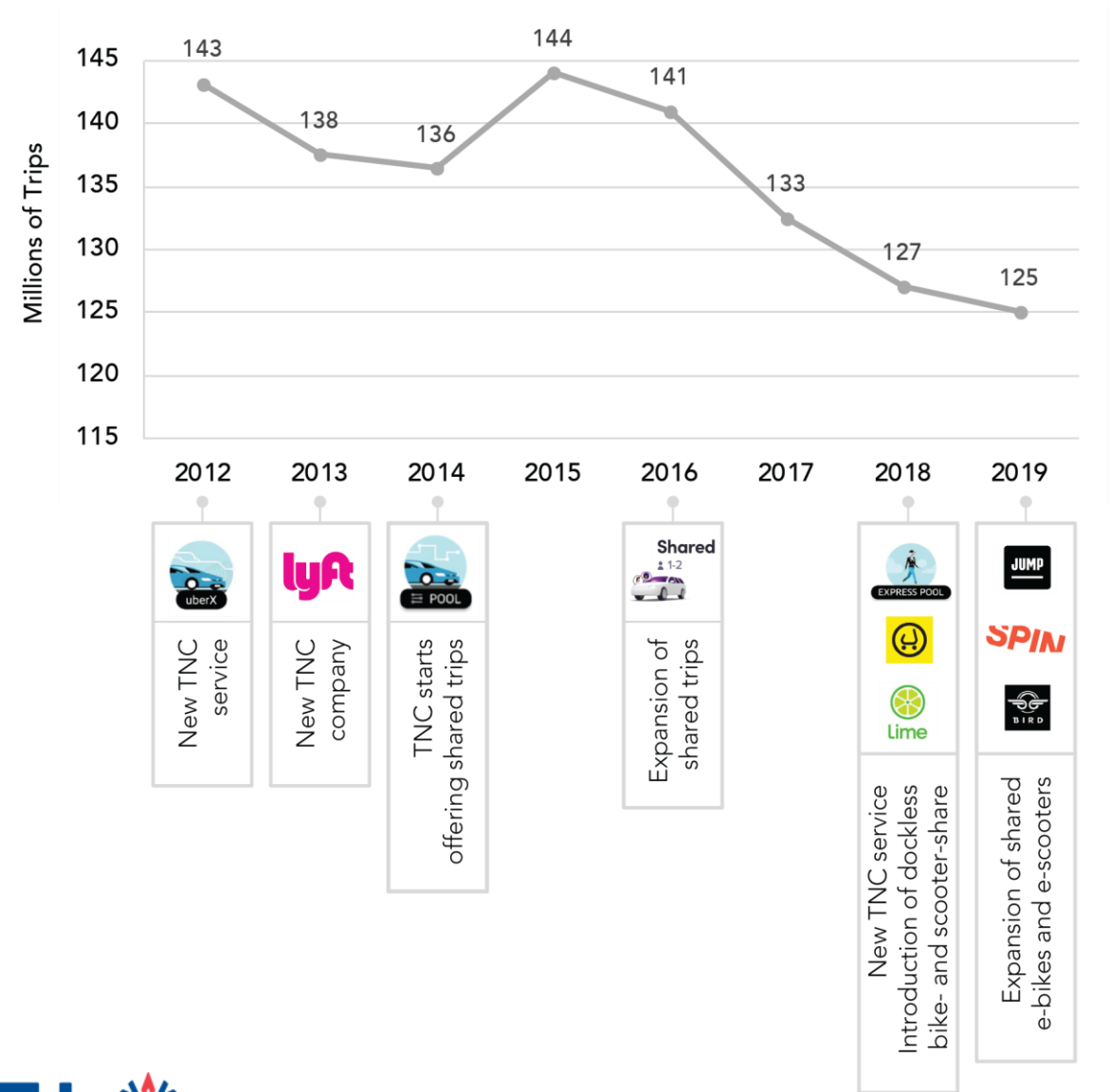
*Regional ridership by mode for FY 2015 – FY 2019*



# RIDERSHIP

- ▶ Ridership decline is consistent with national trends
- ▶ Several factors are likely contributing to the decline:
  - Low gas prices
  - Increases in auto usage due to the strong economy
  - New competition from TNCs and new micromobility services

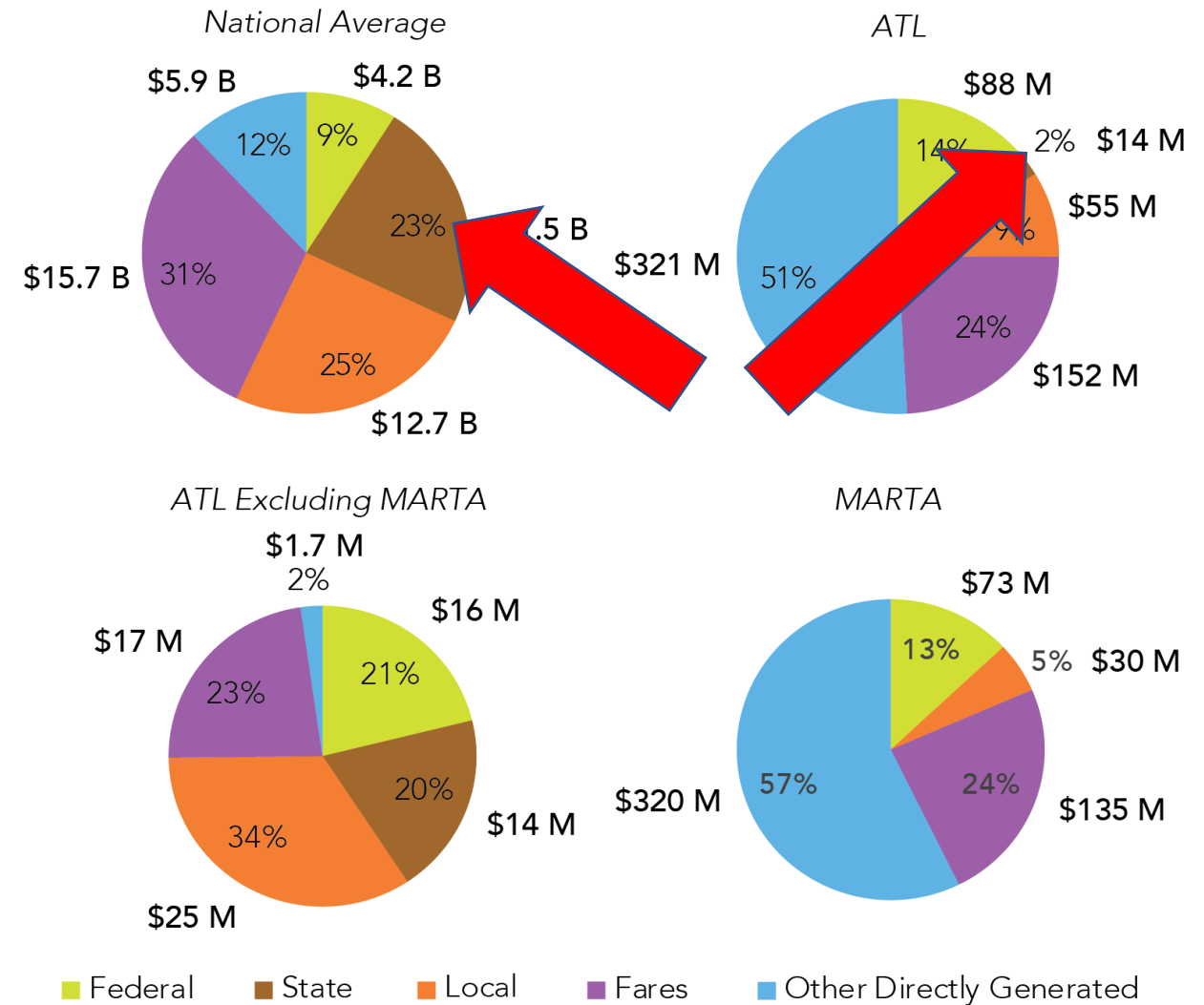
*Transit ridership and new mobility milestones in the region*



# LEVEL OF TRANSIT INVESTMENT: OPERATING EXPENDITURES

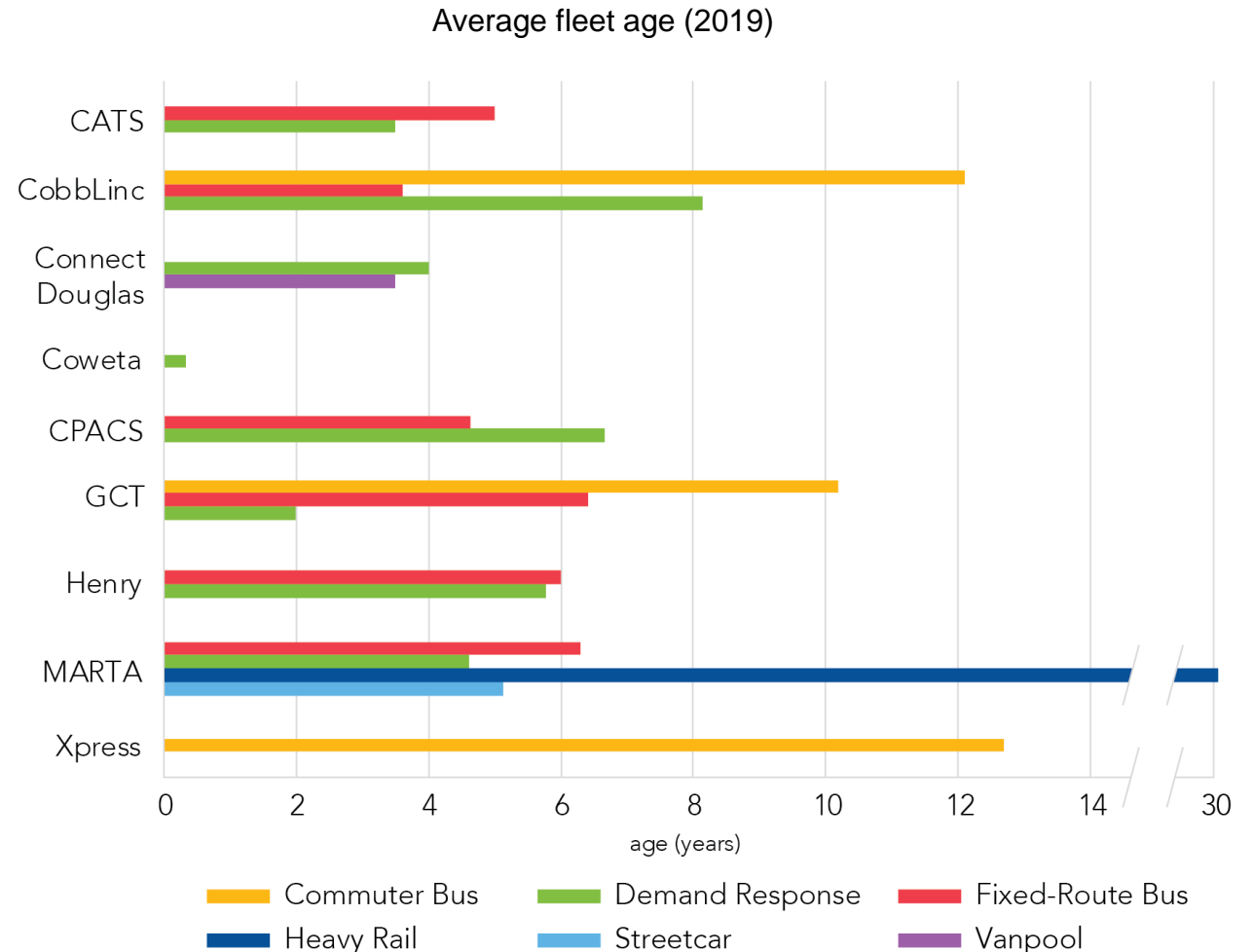
- ▶ Regional operating expenditures for transit totaled over \$580 million in FY 2019.
- ▶ In the region, there is a high reliance on sales tax revenues to fund transit.
- ▶ State funding makes up a smaller portion of both operating and capital funding compared to national averages.

*Operating Revenue Sources (2017)*



# STATE OF GOOD REPAIR

- ▶ Strong correlation between the state of an agency's vehicle fleet and reliability
- ▶ 11 percent of vehicles region-wide are past their useful life benchmarks.
- ▶ The region's commuter bus fleets need the most investment to bring to a state of good repair.







# **Economic and Regional Impact**

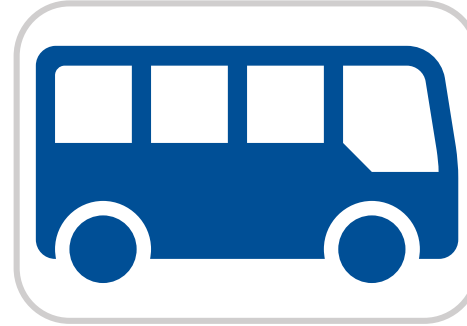
# SOURCES OF VALUE – WHAT MATTERS TO THE REGION?



Address  
Population  
Trends



Support Equity  
and Inclusive  
Growth



Serve  
Commuting  
Needs



Enhance  
Sustainability



Support  
Business

# TRANSIT COMMUTERS AND THE REGIONAL ECONOMY

**80,785  
WORKERS**

Can get to work  
because of transit

**\$2.9  
BILLION**

In annual wages  
brought home by  
transit commuters

**\$9.0  
BILLION**

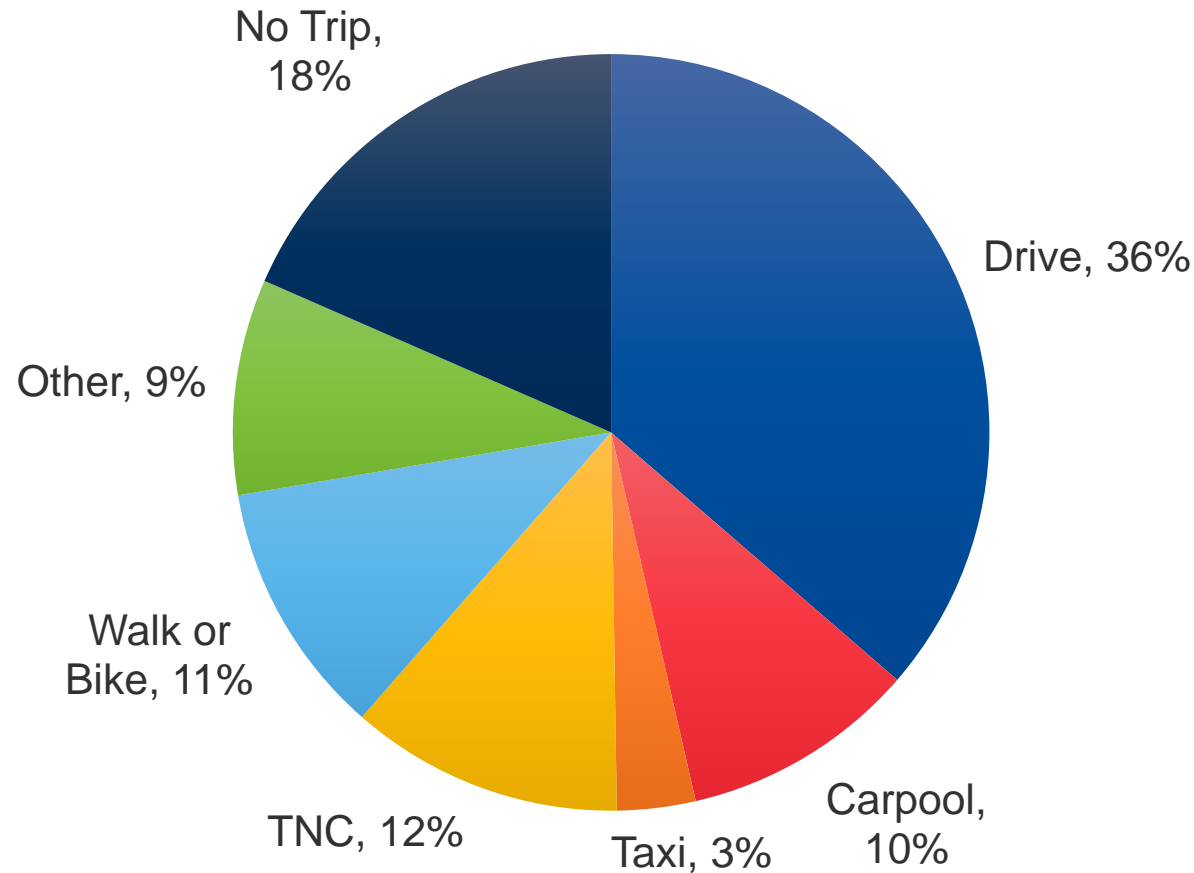
In annual sales  
facilitated by transit  
commuters

**4%**  
Transit commute share, regionwide

Source: 2013-2017 American Community Survey 5-Year Estimates, Public Use Microdata Sample. Sales estimates are based on ratios from 2017 Regional IMPLAN Industry Detail and an adjustment factor from the BEA to translate wage and salary income into total compensation. Because of PUMA geographies, Newton County is included.



# VALUE OF CHOICE: TRANSIT AND ALTERNATIVE MODES



If bus and rail service were unavailable in FY 2019...

> **14 MILLION** forgone trips (linked)

> **369 MILLION** more vehicle miles on the road (1% increase)

## Sources:

- ▶ Individual agency reported ridership
- ▶ 2009-2010 ARC Regional On-Board Survey
- ▶ APTA – Who Rides Public Transportation, 2017
- ▶ Select analysis of regions with survey data on TNCs as an alternative to transit
- ▶ \*Conservative estimate – assumes no greater mileage for carpooling and no deadheading for taxis/TNCs

# VALUE OF CHOICE: TRANSIT AND ALTERNATIVE MODES

## Avoided Trip Costs

- > Based on average transit trip of 9.4 miles
- > Driving costs:
  - > Low: operating costs such as gasoline, maintenance, tires, and depreciation
  - > High: Additional fixed ownership costs
- > Compare to MARTA Fare: **\$2.50**

Diverted Mode	Per Trip Cost	Trips Diverted	Total Cost to Users
Drive (low)	\$3.67	27.7 M	\$101.8 M
Drive (high)	\$5.55	27.7 M	\$153.9 M
Taxi	\$21.31	2.6 M	\$54.5 M
TNC	\$12.78	8.9 M	\$113.9 M

Cost Sources: USDOT BCA Guidance, AAA, Taxifarefinder.com, Taxis-fare.com

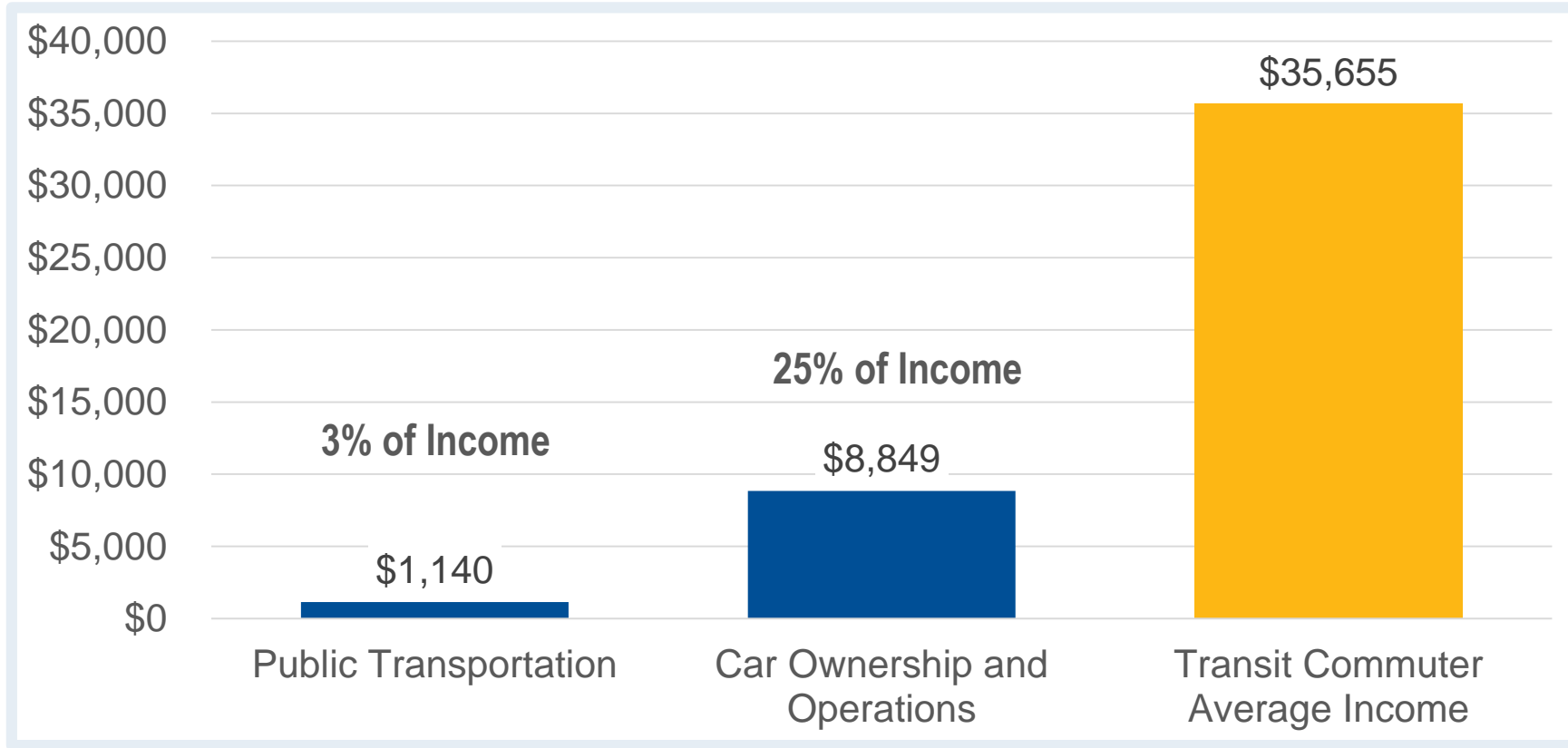
## Estimated avoided emissions (US tons) from avoided 2.1 B in VMT

VOC	NO <sub>x</sub>	PM	CO <sub>2</sub>
125	58	13	66,589

Source: Calculated using the TREDIS® transportation economics suite using per mile emission rates applied to the avoided automobile VMT and to bus revenue miles. Emissions rates in TREDIS® are based on the U.S. Department of Energy's (DOE) AFLEET 2018 model. MARTA rail emissions not included as these are dependent on emissions from the electrical generation process which vary based on fuel mix and geography.



# VALUE OF CHOICE: TRANSIT AFFORDABILITY



SOURCE: Public transportation costs calculated as twelve 30-day MARTA passes (\$95 each); Car ownership and operations from AAA at 15,000 miles per year. Transit commuter average income from research team analysis using 2013-2017 American Community Survey 5-Year Estimates, Public Use Microdata Sample (Ruggles, et al., 2018).



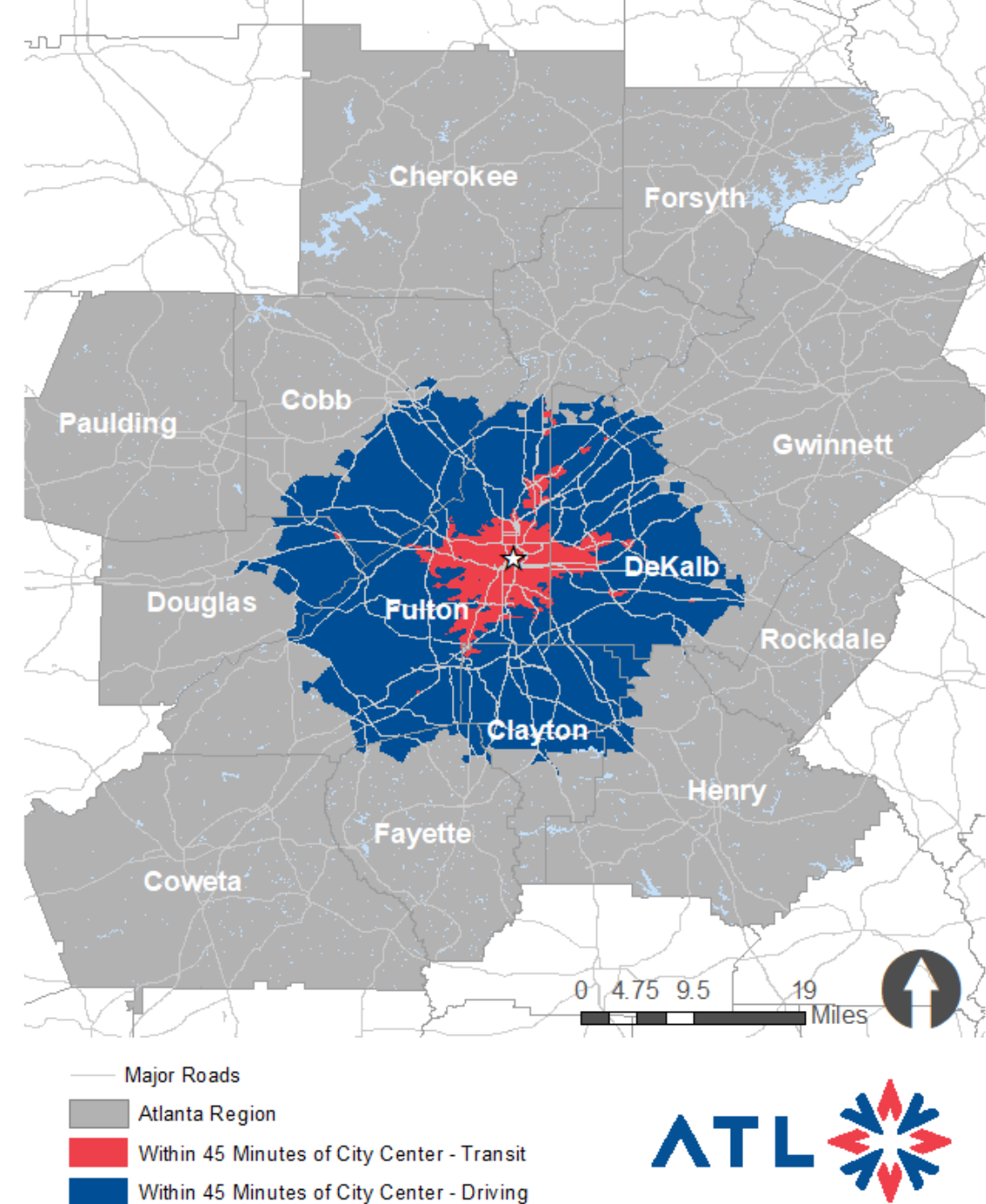
# LABOR MARKET ACCESS CITY CENTER

Population within a 45-minute commute:

► Driving: 1,771,570

► Transit: 307,219

Ratio of Transit Access to Drive Access:  
0.17

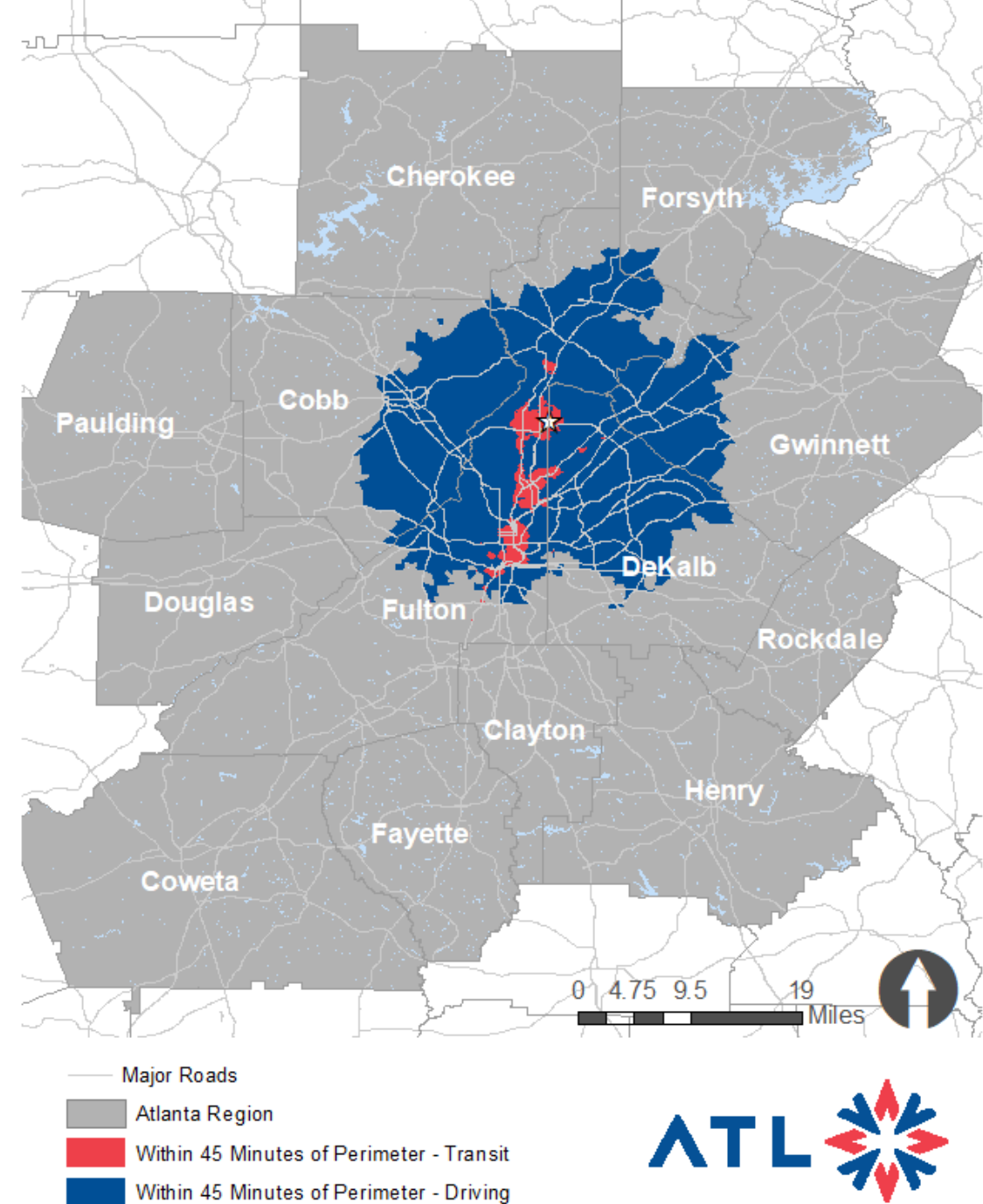


# LABOR MARKET ACCESS PERIMETER

Population within a 45-minute commute:

- Driving: 1,570,776
- Transit: 136,563

Ratio of Transit Access to Drive Access:  
0.09





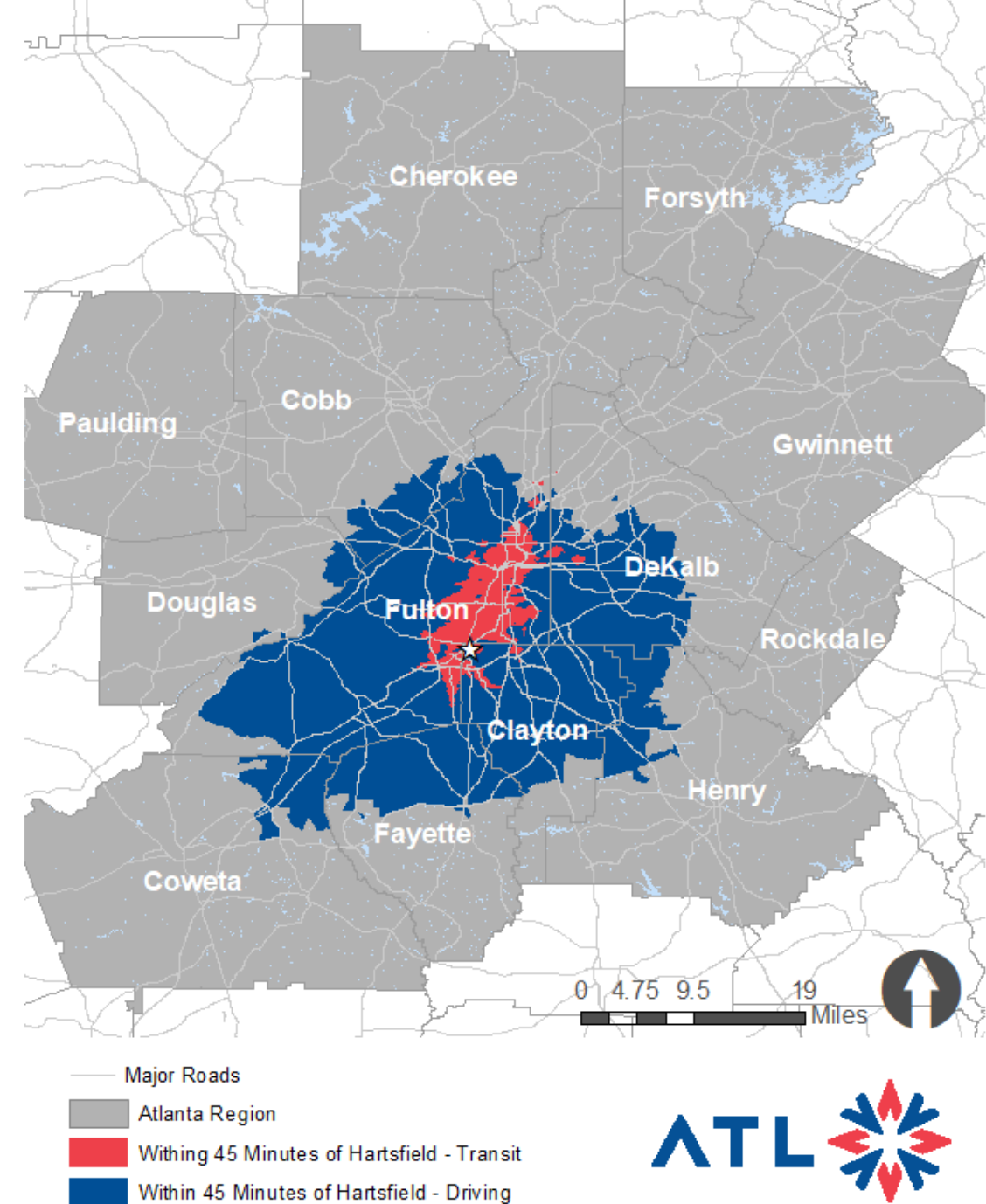
# LABOR MARKET ACCESS AIRPORT

Population within a 45-minute commute:

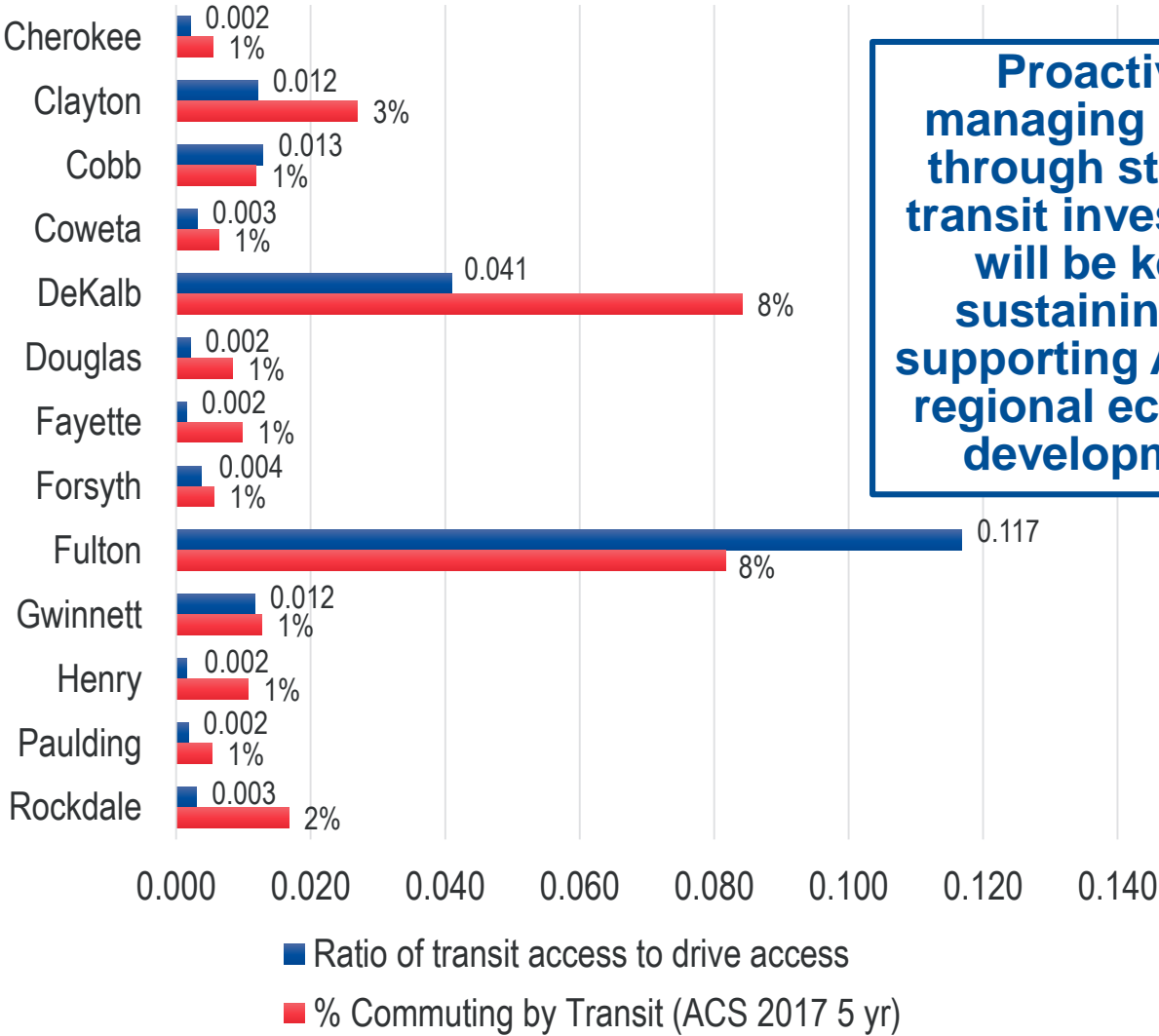
► Driving: 1,235,321

► Transit: 213,925

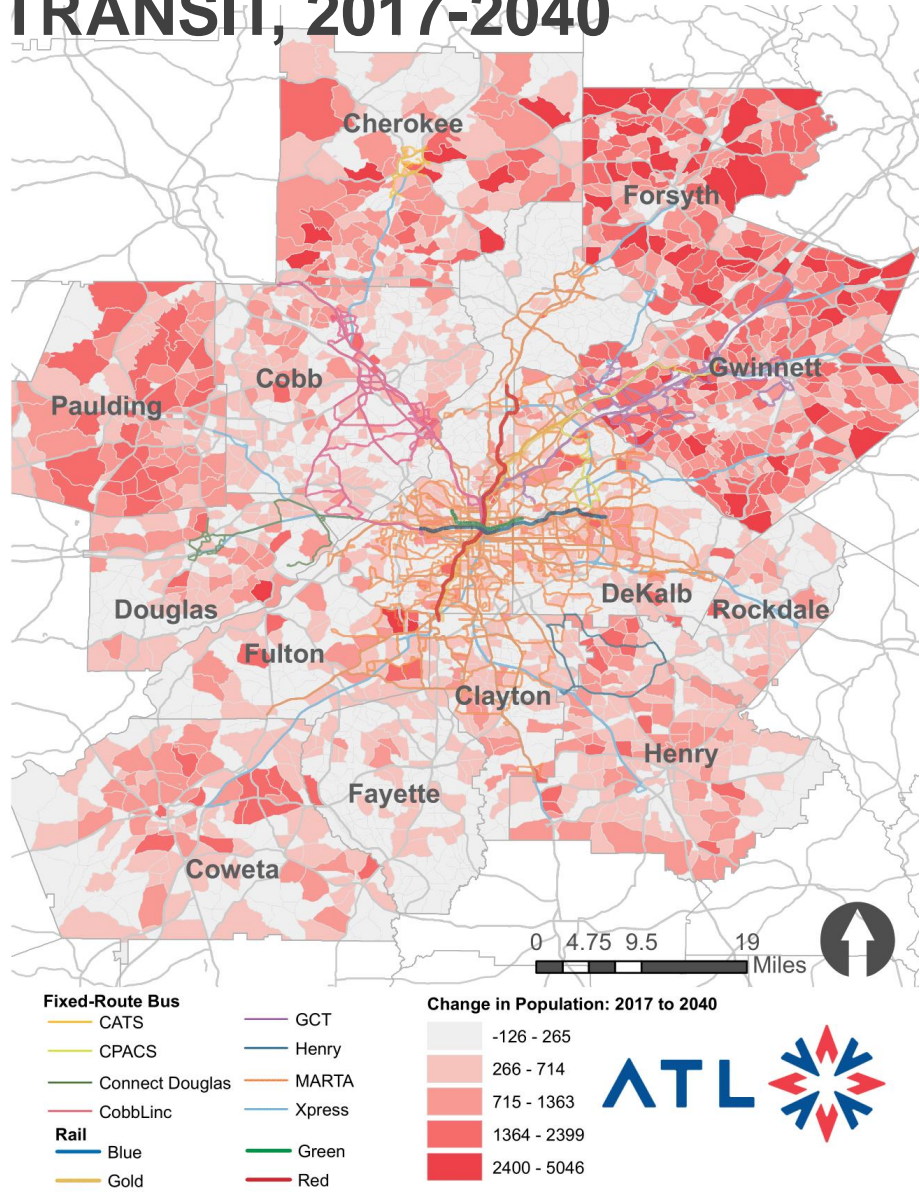
Ratio of Transit Access to Drive Access:  
0.17



# MODAL PARITY AND TRANSIT MODE SHARE



# POPULATION GROWTH AND TRANSIT, 2017-2040





# **Recommendations and Observations**

# FUTURE ANNUAL REPORT & AUDIT CONSIDERATIONS



## Areas for standardizing performance monitoring

Expand the number of agencies tracking on-time performance



Create regionwide questions related to customer service



Coordinate with transit providers to identify consistent means to track safety and crime

# FUTURE ANNUAL REPORT & AUDIT CONSIDERATIONS



## Opportunities for trends to track in future years

Usage of transportation network companies and other micromobility solutions



Impacts that major transit investments have on ridership and the economy



Deployment of low emissions and zero emissions transit propulsion technologies



Implementation of amenities to improve the rider experience

# FUTURE ANNUAL REPORT & AUDIT CONSIDERATIONS



## Next steps for future development

The ATL will share with each agency detailed information about the data requested and a timeline for data submissions

Determining how to streamline the development process to minimize the burden on agencies