



Stepping Up to our Ridership Challenges

Ridership trends and how transit agencies are responding

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APTA Sustainability and Multi-Modal Planning
Conference

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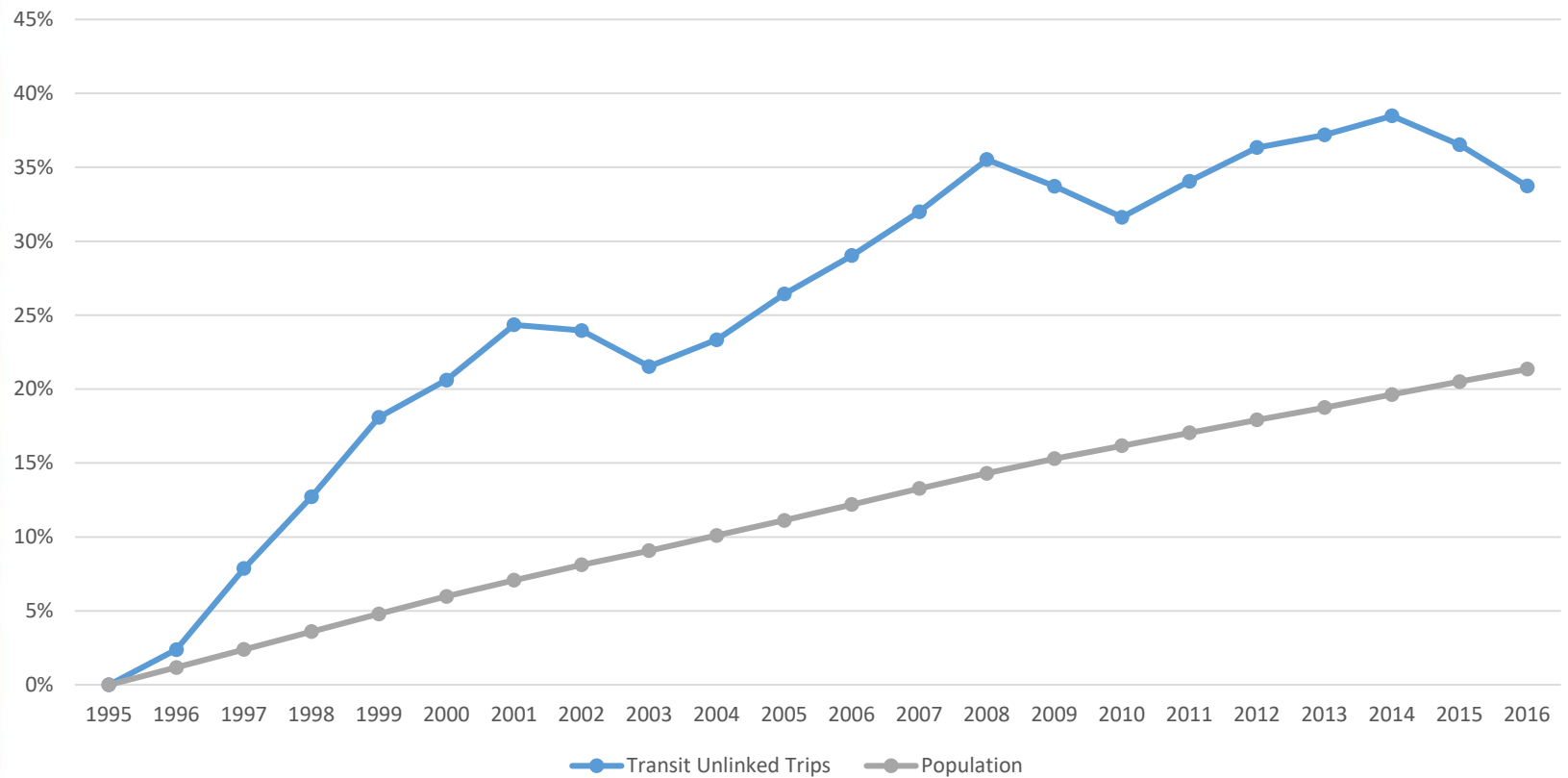
Compared to 20 Years Ago, public transit in America is.....

- more popular.
- more widespread.
- more convenient.
- more balanced.
- more accessible.
- more comfortable.
- still growing.

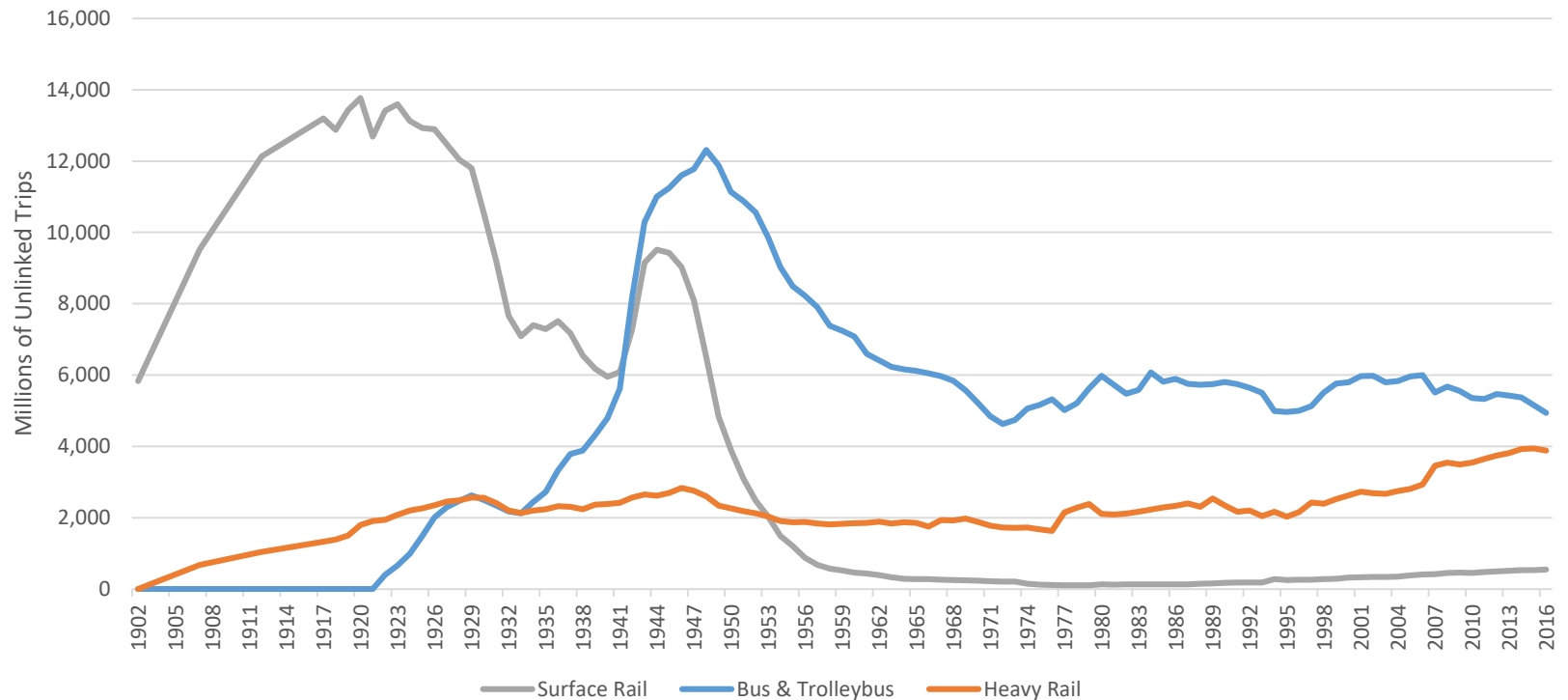


Long-term ridership has been strong

Since 1995 Transit Use Has Grown Faster Than U.S. Population



Ridership in Three Modes 1902 - Present



- Bus trips peaked in 1950
- Streetcar and LRT peaked in 1923
- Heavy rail highest levels ever in 2015



Ridership dip 2015 - 2018

2015 Calendar year

First Quarter:	- 0.66%
Second Quarter:	- 1.24%
Third Quarter:	- 1.69%
Fourth Quarter:	- 1.64%

2016 Calendar year

First Quarter:	+ 0.35% (leap year day)
Second Quarter:	- 2.39%
Third Quarter:	- 2.85%
Fourth Quarter:	- 4.29%

2017 Calendar year

First Quarter:	-3.13%
Second Quarter:	-2.64%
Third Quarter:	-3.65%
Fourth Quarter:	-2.14%

2018 Calendar year

First Quarter:	-3.90%
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Three-year modal snapshot (2014 vs. 2017)

Heavy Rail	- 3.4%
Light Rail	+ 2.5%
Commuter Rail	+ 1.2%
Trolleybus	- 4.2%
Bus Population Group	
2,000,000 +	- 6.8%
500,000 – 1,999,999	- 6.8%
100,000 – 499,999	- 10.4%
Below 100,000	- 1.7%
Bus Total	- 6.8%
Other	- 2.8%
United States Total	- 4.7%



A Mix of Factors

- Changes in the mobility ecosystem
- Work-at-home trends
- Sustained low gasoline prices
- Lingering impacts of the recession (service cuts/fares)
- Automobile purchases up/attitudes/cheap loans/aggressive promotion/affluence
- Changes in urban and suburban neighborhoods / gentrification
- Sprawling regions / non-competitive bus travel times
- Vulnerability of the marginal transit trip (multiple transfers)
- Vulnerability of short trips, given new alternatives
- Drops in college enrollments / rise of online courses
- Parking and road pricing policies
- SGR & service quality issues in certain regions
- TOD success stories / The trip not taken / bike / pedestrian
- Homeless Policy / The transit experience



Understanding the Root Causes



Policy Development and Research

NOVEMBER 2017

Understanding Recent Ridership Changes:

Trends and Adaptations



Four Broad Categories of Impact

Erosion of Time Competitiveness

Reduced Affinity

Erosion of Cost Competitiveness

External Factors



Examples of New Approaches:

- **Sacramento**: Move from “Hub-and-Spoke” to more of a “grid” bus route model to better serve suburban markets.
- **Columbus**: Higher-frequency service in high-density corridors.
- **Boston**: TNC contracts for demand-response services
- **Dallas and Phoenix**: Integrated payment in the works
- **Los Angeles**: Operating microtransit service directly
- **APTA**: Working on a template for TNC agreements
- **FTA MOD Sandbox**: Pilots to address first mile/last mile and low density area service gaps.



Broader Metrics for Measuring Transit's Value

- Backbone of a multi-modal lifestyle
- Community economic impact and development
- Access to jobs, health, education and opportunity
- Sustainability
- Space efficiency / urban design
- Affordability
- Placemaking / community appeal / walkability
- Space efficiency
- Agglomeration benefits / access to workforce
- Alternatives to traffic congestion
- Safer communities
- The great social equalizer
- A multi-modal mobility index



Discussion Points:

- What is the ridership situation in your community?
- What factors are impacting it?
- How can scheduling, service planning and route optimization practices be strategically employed?
- What can be done to counter any adverse trends?
- Can new partners and service models be helpful?
- What might APTA do to support the transit industry?



Miles to go before we sleep....

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