

TENNESSEE TRANSIT: TODAY & TOMORROW

TRANSIT IN TENNESSEE TODAY

Public transportation is available in all 95 counties of Tennessee. Regional rural agencies serve as an efficient, cost effective means of providing broad coverage for critical medical, grocery, and employment trips. Urban agencies provide fixed route services that are an integral part of a multi-modal transportation system.

Proximity of fixed routes, frequency of service, and hours/days of service vary widely across the state. Almost all Tennessee transit operates in mixed traffic, limiting the extent to which transit can provide time savings over driving alone. There are opportunities for improvement of the state's transit system to maximize operating efficiencies and increase mobility options for all Tennesseans.

TYPES OF TRANSIT SERVICE IN TENNESSEE

Large Urban Systems: Multiple routes with set schedules and set routings, with complimentary paratransit service.

Small Urban Systems: Same operating pattern as the large urban systems. However, small systems are less likely to offer evening or weekend service.

Rural and Demand Response Systems: Riders need to call in advance for a ride. Service is door to door. Dispatching software enables providers to group passengers to improve efficiency.

LOCAL TRANSIT AGENCIES AND REGIONAL SERVICE AREAS



★ Large Fixed Route Systems	▲ Small Fixed Route Systems	Demand Response/Flex Route Systems	
<ul style="list-style-type: none"> Memphis Area Transit Authority (MATA) Nashville Metropolitan Transit Authority (MTA) Chattanooga Area Regional Transportation Authority (CARTA) Knoxville Area Transit (KAT) Regional Transportation Authority of Middle Tennessee (RTA) 	<ul style="list-style-type: none"> Bristol City Transit Cleveland Urban Area Transit System Clarksville Transit System Franklin Transit Authority Gatlinburg Mass Transit System Jackson Transit Authority Johnson City Transit Kingsport Area Transit Service Murfreesboro Public Transportation Pigeon Forge Fun Time Trolley 	<ul style="list-style-type: none"> City of Oak Ridge Cookeville Area Transit* Delta HRA East Tennessee HRA First Tennessee HRA Knox County Community Action Committee (CAC) Mid-Cumberland HRA 	<ul style="list-style-type: none"> Mule Town Trolley (Columbia)* Northwest Tennessee HRA South Central Tennessee Development District Southeast Tennessee HRA Southwest Tennessee HRA Upper Cumberland HRA
		* Flex route systems (▲)	

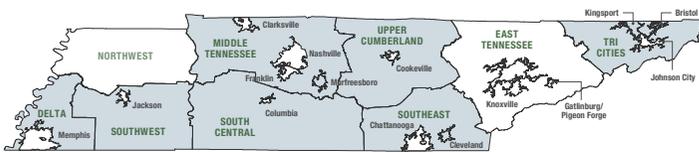


PUBLIC TRANSPORTATION NEEDS - CURRENT AND FUTURE, RURAL AND URBAN

Transit needs were identified through stakeholder discussions and analysis of data. Stakeholders (transit agencies, MPOs/RPOs, and riders) participated in two rounds of input at eight locations around the state. Key needs include:

 **Improving Coverage.** Where transit services exist, they often do not cover an entire urbanized area nor operate in the evenings or on weekends, leaving many people without services.

TRANSIT SERVICE GAPS



Weekend (Saturday and Sunday)

Areas with Gaps



Evening (after 6pm)

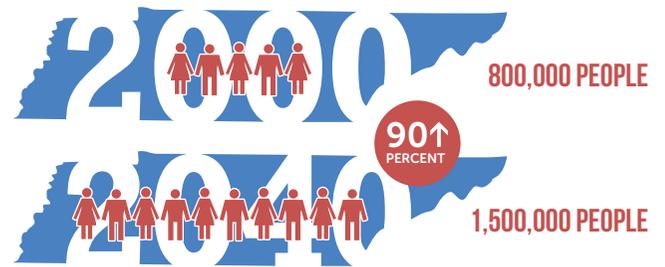
Areas with Gaps

 **Providing an Alternative in Congested Urban Corridors.** Significant population and employment growth throughout the state will severely impact traffic congestion in the urban areas. Dedicated rights of way allow transit to operate separate from traffic congestion.



 **Providing Mobility for Those Without Other Means of Transportation.** Access to medical care, food and employment lowers health care costs and unemployment in Tennessee.

AGE 65+ POPULATION



Tennessee's growing senior population will have a significant impact on mobility and safety needs across the State over the next 25 years.

Total population is forecast to grow 24% in the next fifteen years, adding almost 1.6 million people to the State.

 **Bringing Transit Capital Assets to a State of Good Repair.** Only about 50% of the vehicles used by the fixed route systems and 35% of the demand response system vehicles are in a "state of good repair." Vehicles past their useful life become more expensive to maintain, impacting service and reliability.



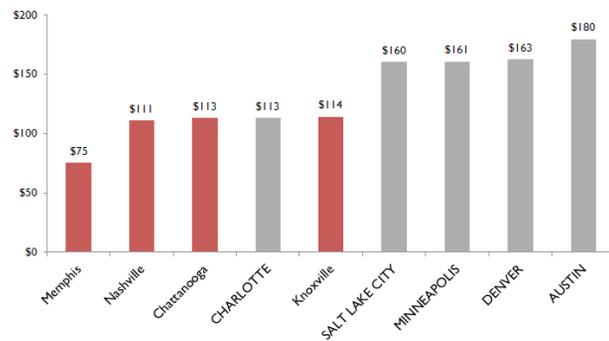
ALTERNATIVES FOR FUTURE EXPANSION

Funding and service scenarios were developed based on existing conditions and input from stakeholders and the public. Three alternate funding service scenarios representing a range of transit services were developed for two time horizons — 10 years and 20 years. The scenarios are Proportional, Modest, and Robust.

	STATIC FUNDING	PROPORTIONAL EXPANSION	MODEST EXPANSION	ROBUST EXPANSION
Scenario Definition	Funding remains at 2016 level, despite inflation. Less transit service will lead to a ridership loss compared to today.	Transit services are increased only to keep up with population growth. All fleets are brought up to a "State of Good Repair."	Service gaps are covered (later evening and Saturday service) for all systems. Increased coverage and frequency is added for fixed route systems. Service hours are increased for demand response systems.	In addition to the "Modest Expansion" increase, the four large metro areas implement high capacity transit solutions operating in dedicated rights of way (not in mixed traffic). Examples include commuter rail, light rail, and bus rapid transit (BRT).
Capital in a "State of Good Repair"	No	Yes	Yes	Yes
Additional Weekend Service	No	No	Yes	Yes
Additional Night Service	No	No	Yes	Yes
Frequency on Fixed Routes	Decrease	No Change	10% Increase	Four large systems achieve same service level as peers
Per Capita Cost	Decrease	Increase	Increase	Four large systems achieve same service level as peers
Total Transit Cost	No Change	Increase	Increase	Increase
Statewide Transit Trips	Decrease	Increase	Increase	Increase
Ridership Change				

OPERATING EXPENSE PER CAPITA

Peer systems (Charlotte, Salt Lake City, Minneapolis, Denver and Austin) used as comparison to Memphis, Nashville, Chattanooga, and Knoxville.



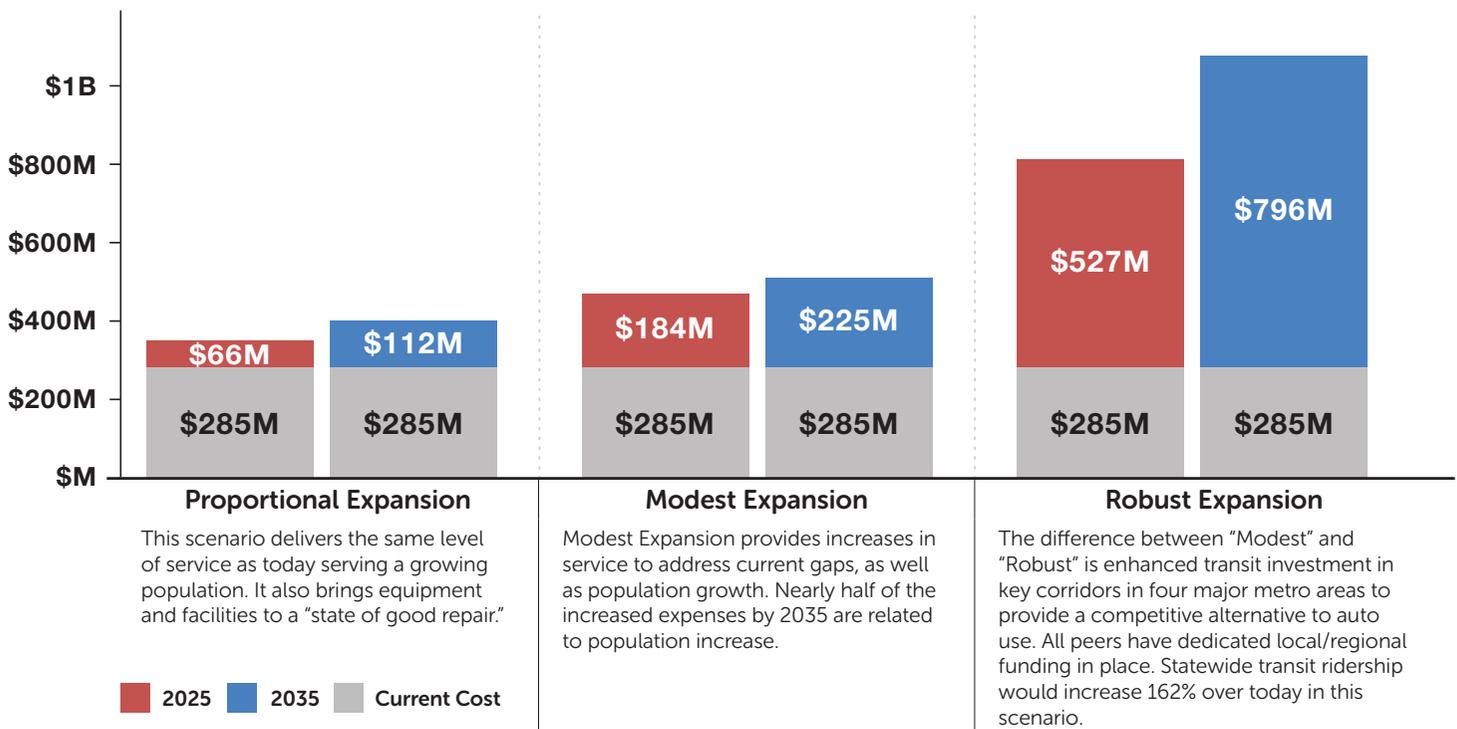
TRANSIT IN TENNESSEE TOMORROW

The cost of implementing each general scenario is estimated below. **It is important to note that this reflects total cost without consideration of the source of funds (Federal, State, or Local).** Future conversations are needed to determine how these funding needs are addressed.

KEY ASSUMPTIONS:

- Costs are presented in 2016 dollars
- 10 and 20-year figures represent a “snapshot” for that year
- Source of funding (Federal, State, Local/Regional) is not addressed

ANNUAL COST BY SCENARIO 2025 & 2035



KEY TAKE-AWAYS:

- Given our population growth and aging residents, an increase in funding is needed even to maintain the current level of service.
- If the large metro areas of Tennessee are to keep pace with peers in terms of transportation infrastructure, substantial increases in transit service and funding are needed.
- Primary responsibility for funding operations within the large urbanized areas will be the responsibility of the local jurisdictions.
- Transit service that is competitive with commuting by car is best provided in a dedicated right-of-way so that users enjoy time savings over commuting alone. Substantial investment in regional corridors is needed.