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Status of Rural Public Transportation – 2000

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Prepared by
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Table of Contents

Introduction/Overview of Findings	3	Table 17: Annual Replacement Need	18
Section I: Project History and Methodology	4	Section VI: Maintenance and Administrative	
Section II: Historical Appropriations	6	Facilities	19
Section III: Rural Demographics and Transit		Maintenance Facilities	19
Dependency	7	Table 18: Maintenance Options	19
Section IV: The Network	8	Table 19: Ownership or Rental of Maintenance	
Providers	8	Facility by Agency Type	19
Table 1a: Types of Providers	8	Table 20: Mean Size of Maintenance Facilities	19
Table 1b: Changes Among Types of Providers	8	Table 21: Condition of Maintenance Facilities	19
Fleet	8	Table 22: Percentages of Providers Reporting	
Table 2: Fleet Sizes	8	Maintenance Facility Investment Plans	19
Table 2b: National Quartile Fleet Averages	8	Administrative Facilities	20
Service Areas	9	Table 23: Administrative Facility Ownership	20
Table 3: Scope of Operations	9	Table 24: Administrative Facility Ownership by	
Table 3b: Mean Density, Service Area, and Population	9	Agency Type	20
Types of Service Delivery	9	Table 25: Satisfaction with Administrative Facility	20
Table 4a: Section 5311 Agencies Delivering a		Section VII: Description of the Workforce	21
Single Mode of Service	10	Workforce Overview	21
Table 4b: Occurrence of Service Modes	11	Table 26: Total workforce	21
Revenue Sources and Funding Patterns	11	Table 27: Workforce Composition by Fleet	
Table 5a: Sources of Operating Revenue	12	Size Quartile	21
Table 5b: Leading Sources of Human Services		Table 28: Reported Workforce by Fleet	
Funding for Rural Transit	12	Size Quartile	21
Patterns in Rural Transit Ridership	13	Table 29: Average Workforce Size and	
Table 6: Section 5311 Ridership by Type of		Composition by Agency Type	22
Agency and Scope of Service	13	Volunteers	22
Section V: The Fleets	15	Table 30: Volunteers	22
Table 7: Changing Fleet Sizes	15	Table 31: Percentage of providers using volunteers	
Table 8: Fleet Composition by Quartile	15	by agency type	22
Table 9: Fleet Composition by Agency Type	16	Table 32: Percentage of providers using volunteers	
Small Vehicles (Fewer than 8 passengers)	16	by service area type	22
Table 10: Small Vehicles	16	Driver Wages	22
Vans (8-15 passengers)	16	Table 33: Mean and Median Driver Wage Ranges	23
Table 11: Vans	16	Table 34: Mean and Median Driver Wages	23
Small Buses (16-24 passengers)	17	Section VIII: Extrapolated Service Overview	24
Table 12: Small Buses	17	Table 35: Overview	24
Medium Buses (25-35 passengers)	17	Contracts	24
Table 13: Medium Buses	17	Table 36: Contracts	24
Large Buses (More than 35 passengers)	17		
Table 14: Large Buses	17		
Accessibility by Agency Type	18		
Table 15: Lift or Ramp Equipped Vehicles by			
Agency Type	18		
Annual Replacement Need	18		
Table 16: An Aging Fleet	18		

Introduction/Overview of Findings

Some striking changes have taken place over the past six years in the rural transit agencies that receive Section 5311 federal funds.

The following pages present and analyze the data collected in this survey to determine the "Status of Rural Public Transportation - 2000." The survey includes data on the kinds of services being delivered, sources of revenue, the composition and age of the fleet, maintenance operations, patterns of ridership and workforce profiles.

The most dramatic change since a similar survey was taken in 1994 is a 93 percent increase in miles traveled. The number of passenger trips has increased 62 percent.

Passengers are primarily women (62 percent) and elderly (31 percent). Overall, the use of rural transit by women, seniors and persons with disabilities is at the same rates as reported in 1994.

The rural transit workforce has nearly doubled and the number of vehicles in service increased by almost 60 percent.

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Section I: Project History and Methodology

Although Federally funded, the Section 5311 program is administered by the states. States receive Section 5311 formula grants from the Federal government and apportion those funds among their rural transit providers. Each state determines its own reporting and administrative requirements: even vehicle life-standards are set at the state level. Gathering information about the program, therefore, requires surveying states and providers.

The Institute for Economic and Social Measurement (IESM) initiated this overview of the rural transit program under a cooperative agreement with the Federal Transit Administration as a National Rural Transit Assistance Program (RTAP) activity. In 1997, IESM surveyed all 50 state Departments of Transportation to compile a comprehensive listing of all 5311 providers, resulting in a database of 1,215 agencies. IESM then designed a survey to gather detailed information about the providers and their operations. In 1999, it sent the survey to a random sample of 334 providers, 108 of whom responded. At that point, the Community Transportation Association of America (CTAA) assumed responsibility for the remainder of the project on behalf of the National RTAP.

In early 2000, CTAA sent the same survey to a second sample of 50 providers from whom they forced a 100% response rate. It compared the two data sets for response bias from the initial group and found the data consistent. As a result, most of the following information is based on a total sample of $N = 158$. While reasonable efforts were made to ensure the accuracy of data, especially as to the projections based on these data, it is possible that some errors were introduced through the sampling process.

Although survey respondents provided information covering different 12-month periods (commencement dates ranged from June 1997 to June 1999), all data are combined for the purpose of this analysis.

Public and non-profit agencies provide the vast majority of Section 5311 services and, where appropriate, this report has delineated the data characteristics of each group. Three percent of 5311 providers are Tribal or for-profit agencies: although their responses are included in the aggregate data, their representation in the sample pool was too small to delineate.

Commercial over-the-road-bus operators were largely excluded from the survey and the results presented here. Section 5311 (f) requires each state to spend 15 percent of its annual Section 5311 apportionment "to carry out a program to develop and support intercity bus transportation," unless the Governor certifies that "the intercity bus service needs of the state are being met adequately." Although some agencies provide both Section 5311 and Section 5311 (f) services, in general, intercity bus operators tend to have larger vehicles and slightly higher wages.

Strictly speaking, this is an analysis of activities that are funded with some support from the federal "Section 5311" program of formula grants for public transportation services in areas other than urbanized areas as defined by the Census Bureau. To ease the readability of this analysis, it uses the term "rural" in reference to the areas outside urbanized areas, the grant programs that support these areas, and the public transportation programs that serve them. It should be noted, though, that the Census Bureau has a very different definition of what is "rural," and readers are cautioned to exercise caution if making comparisons between the data presented in this analysis and any other data analyses.

The data used in historical comparisons are from the "Status Report on Public Transportation in Rural America" (1994), and the "Profile of the Urban Mass Transportation Administration's Section 18 Rural Transportation Funding Program" (1991), both of which were prepared by The Community Transportation Association of

America. Unless otherwise noted, projected information is based on simple linear projections.

This analysis was prepared by Corine Hegland and Chris Zeilinger of the Community Transportation Association of America (CTAA), with the involvement and assistance of Janet McGlynn, Melina Scotto, and numerous other staff at CTAA. Principal data collection and preliminary data analysis were performed by Jon Burkhardt and Adam McGavok of the Institute for Economic and Social Measurement.

This analysis is a product of the Federal Transit Administration's National Rural Transit Assistance Program, and was prepared pursuant to cooperative agreements among the Federal Transit Administration, the American Public Works Association and the Community Transportation Association of America. It is disseminated under the sponsorship of the United States Department of Transportation in the interest of information exchange. Neither the United States Government nor any of the parties in these cooperative agreements assume liability for its contents or the use thereof.



Section II: Historical Appropriations

Prior to 1978, virtually all federal transit assistance went to urban areas. In that year, at the urging of President Carter, Congress created a new program as the result of a demonstration project initiated under Section 147 of the Federal Highway Act. The new program, Section 18 of the Urban Mass Transit Act, provided public transportation funds for services in areas with populations of less than 50,000.

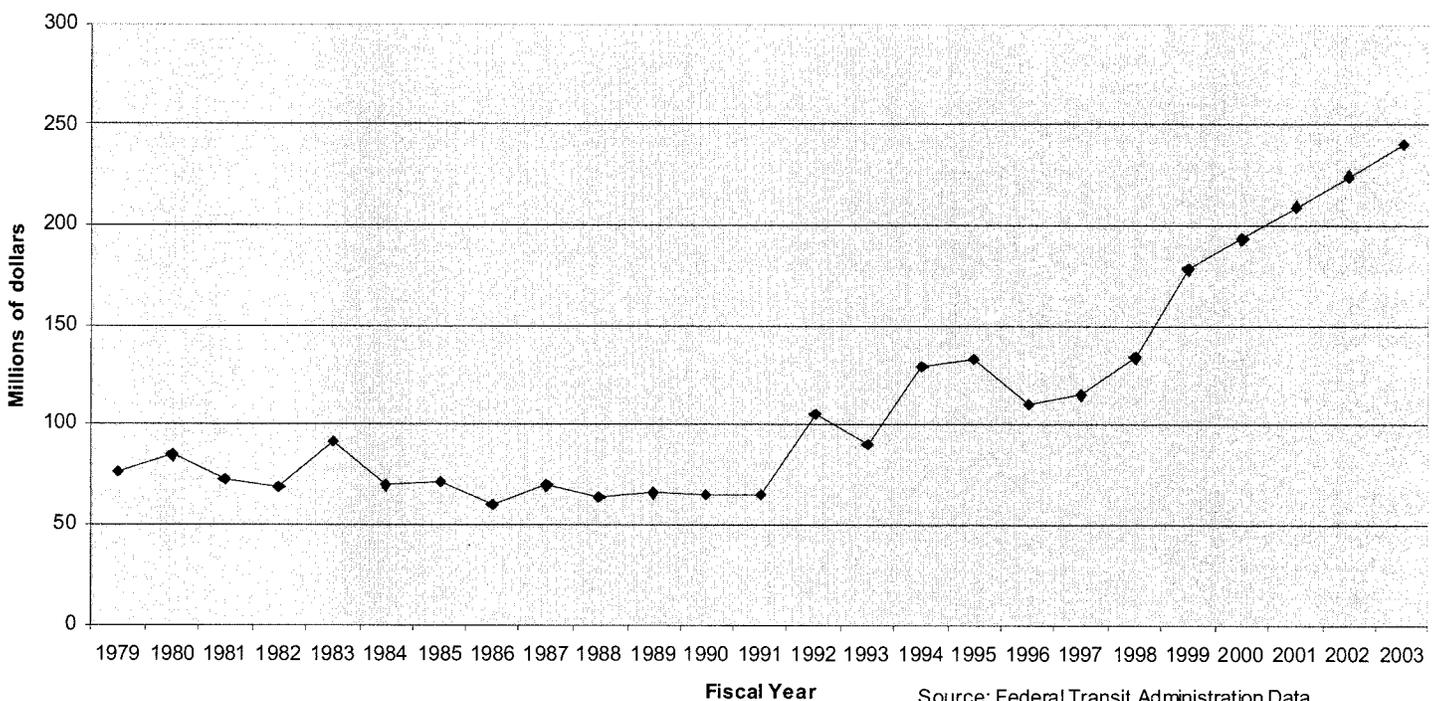
Federal Funding for rural transit remained fairly steady through 1991. With the passage of the Intermodal Surface Transportation Efficiency Act of 1991 (ISTEA), Federal rural transit spending began increasing, although not without occasional significant funding downturns. In 1994, legislation recodified the Federal Transit Program, changing the citation for the rural transit program from Section 18 to 49 USC Section 5311.

The Transportation Equity Act for the 21st Century (TEA-21) dramatically increased funding

for all transit, including Section 5311. Furthermore, TEA-21 established guaranteed funding levels for Section 5311 programs. By 2003, the end of TEA-21's authorization period, Federal rural transit funding will hit \$240 million, an 80 percent increase from 1998 and a 266 percent increase from 1991. States can transfer additional funds to rural transit from their flexible funds available for either highway or transit projects and the formula transit funds for the small urbanized areas (between 50,000 and 200,000 population).

States receive Section 5311 funds according to a statutory formula that calculates each state's population in rural areas and places of less than 50,000 residents. States administer the funds, in accordance with national guidelines, by making specific funding decisions and monitoring program implementation. The following appropriations table includes the 5311 (f) funding (see Section I: Project History and Methodology for further information).

Rural Transit Appropriations



Section III: Rural Demographics and Transit Dependency

More than one-third of America's population lives outside of urbanized areas. Of the 249 million people counted by the 1990 Census (the most recent data available), 94 million were in the 33 largest urbanized areas (those of a million or more people). Another 38 million live in areas with between 200,000 and a million residents and 26 million live in areas of between 50,000 and 200,000. That leaves almost 91 million people, or 36 percent of the population, living in rural America.

While rural America's population grew by 3.5 percent between 1980 and 1990, the total U.S. population grew by 10 percent and urbanized areas outpaced national growth by expanding almost 14 percent (including the designation of 33 new urbanized areas as a result of the 1990 Census).

The Section 5311 service area includes 773 cities with populations between 10,000 and 50,000, comprising 15 percent of the rural population (according to the 1990 Census). Nearly 41 percent of the rural population lives in areas close enough to urban centers to be considered part of Metropolitan Statistical Areas.

Transit Dependence

Senior citizens, persons with disabilities, and low-income people are particularly transit dependent. Nationally, 76 million people are transit dependent (based on 1990 Census data) and 29 million of them, or 38 percent, live in rural areas. Thirty-two percent of all rural residents are classified as transit dependent, including 36 percent of all rural Americans living in non-metropolitan areas, while 30 percent of urban residents are so classified.

The Section 5311 service area includes nearly 3.5 million square miles and almost 91 million people, 32 percent of whom are disadvantaged by age, poverty and/or disability. One in 13 rural Americans lives in a household without a personal vehicle. To put it another way, the Section 5311 program is expected to serve 36 percent of the overall population, 38 percent of the transit-dependent population and 24 percent of persons living in carless households.



Section IV: The Network

Providers

According to the ISEM data collection for the Federal Transit Administration, there were 1,215 Section 5311 providers in 1998, an increase of 6 percent since 1994. Public and non-profit agencies continue to provide the vast majority of services. Tribal and for-profit agencies together account for only 3 percent of the network.

Table 1a: Types of Providers

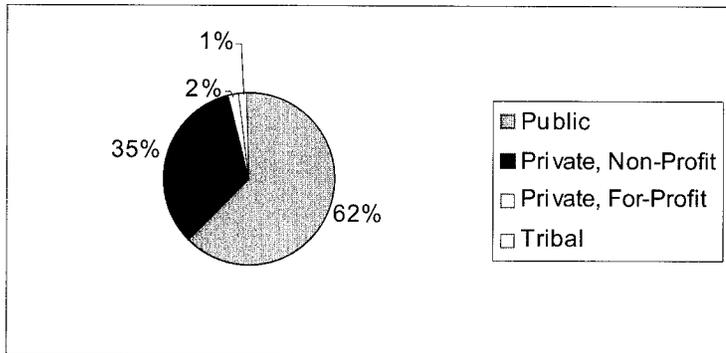


Table 1b: Changes Among Types of Providers

	Public	Private, Non-Profit	Private, For-Profit	Tribal
1994	58%	37%	3%	2%
2000	62%	35%	2%	1%

Fleet

While the number of providers remained relatively constant over the past six years, fleet sizes expanded dramatically. On average, among the providers reporting vehicles, they operate 17.5 vehicles, a 60 percent increase from 1994, and they have a median fleet size of 9, a 50 percent increase from 1994.

Table 2: Fleet Sizes

	Mean	Median
National Average	17.5	9
Public	17	10
Non-Profit	19.5	9

The expansion of vehicles has occurred across the network, from the smallest to the largest providers. When the providers are ranked by size of fleet and divided into four equal groups, those in the smallest fleet size quartile operate one to three vehicles, while those in the top quartile average almost fifty vehicles each.

Table 2b: National Quartile Fleet Averages

	Average Fleet Size
1 st Quartile (1-3 vehicles)	1.64
2 nd Quartile (4-8 vehicles)	5.65
3 rd Quartile (9-17 vehicles)	11.63
4 th Quartile (18-338 vehicles)	48.9

Service Areas

Since 1994, providers operating within city or town limits remained almost constant at 27 percent of the network. Single-county providers decreased by 15 percent, however, while multi-county providers increased by 7 percent.

In the earlier surveys, multi-county providers were serving the lowest population density areas. In this survey, providers reported the reverse. Single-county providers are now serving the lowest density areas, while multi-county providers serve more densely populated locations. This change suggests that countywide providers in denser areas expanded their services into multiple counties.

Table 3: Scope of Operations

	Number of Responders in Sample	Percentage	Projection to Total
City-Town	42	27%	316
Single County	58	37%	450
Multi-County	45	28%	340
Other	13	8%	97
TOTAL	N=158	100%	1215

Table 3b: Mean Density, Service Area, and Population

	Multi-County	Single County	City-Town
Mean Density (people/square mile)	53	23	311
Mean Service Area (square miles)	54,000	2,329	184
Mean Population	285,670	52,573	57,305

Types of Service Delivery

In the rural transit network, as with public transportation generally, the past several years have seen much diversification in the modes by which transit services are provided. Traditional fixed-route and demand-response (or dial-a-ride) services continue to dominate service modes in rural transit. However, half of all rural transit providers now offer various forms of route- or point- deviation services (i.e., services which are provided on scheduled routes or times, but deviate from these routes as requested for passenger pickups and drop-offs).

As was true in 1994, six out of seven (i.e., 85 percent) of Section 5311 providers report offering at least some demand-response service, but the number of providers for whom demand-response service is the only mode of operation has declined from 27 to 24 percent.

Conversely, some fixed-route service is now reported by 51 percent of Section 5311 providers, an increase from 42 percent in 1994.

Route- and point-deviation services were not even reported in 1994, yet now reportedly are offered by 50 percent of Section 5311 providers.

Another area of change in the Section 5311 network has been the expansion of brokered arrangements for providing transportation services. In 1994, less than three percent of Section 5311 providers reported any brokering of service; this number has increased to 18 percent of the network. Much less dramatic has been an apparent growth in the number of Section 5311 providers who report coordinating ridesharing and van- and carpooling programs as part of their public transit service; this number, which was less than one percent in 1994, has grown to include five percent of the network.

Overall diversification of delivery modes has changed, too, since 1994. At that time, 67 percent of Section 5311 providers used one single mode as their exclusive means of providing transit services in the community. Today, that number has fallen by half, to 34 percent of the network.

With this increase in the diversification of service modes among Section 5311 providers, some patterns appear to have emerged that were not observed in 1994. In the earlier analysis, the Section 5311 network was internally consistent, in terms of use of fixed-route, demand-response, and non-traditional modes...no meaningful differences emerged when looking at agency types, service area characteristics, or size of agency.

Today, however, stronger distinctions have arisen, including the following observations:

- Private nonprofit transit providers are much less likely to offer a single, exclusive mode of service than public transit agencies.

- Demand-response services are much more likely to be a feature of the service delivery offerings of private nonprofit transit providers.
- Multi-county transit providers are much more likely to include brokered transportation as part of their service delivery mixture.
- Route- and point-deviation services are inordinately common among multi-county transit providers, and among transit providers with the largest vehicle fleets.
- Transit providers serving a single city or town are much more likely to rely on traditional fixed-route transit service, and are much less likely to include demand-response services among their service delivery offerings.
- Fixed-route transit service is especially uncommon among Section 5311 providers with three or fewer vehicles in their fleets.

Table 4a: Section 5311 Agencies Delivering a Single Mode of Service

(Percentages of reported totals, and projected numbers of agencies; based on a sample of 138 responses)

	Any single mode	Only Fixed-Route	Only Deviation	Only Demand-Response	Total, All Modes
National Average	33% (405)	5% (62)	3% (35)	25% (299)	100% (1215)
Nonprofit	16% (70)	0	0	16% (70)	100% (425)
Public	44% (335)	8% (62)	5% (35)	30% (229)	100% (753)
City or Town	47% (150)	11% (35)	6% (18)	28% (88)	100% (316)
Single county	37% (167)	2% (9)	2% (9)	33% (150)	100% (450)
Multi-county	26% (88)	5% (18)	3% (9)	18% (62)	100% (340)
1 st Quartile (1 - 3 vehicles)	50% (150)	0	3% (9)	47% (141)	100% (303)
2 nd Quartile (4 - 8 vehicles)	43% (132)	17% (53)	6% (18)	20% (62)	100% (304)
3 rd Quartile (9 - 17 vehicles)	20% (62)	3% (9)	3% (9)	14% (44)	100% (304)
4 th Quartile (18 - 338 vehicles)	20% (62)	0	0	17% (53)	100% (304)

Table 4b: Occurrence of Service Modes*(Percentages of reported totals, and projected numbers of agencies; based on a sample of 137 responses)*

	Some Fixed-Route	Some Deviation	Some Demand-Response	Some Brokerage	Some Ridesharing	Total, All Modes
National Average	51% (621)	50% (603)	85% (1038)	18% (221)	5% (62)	100% (1215)
Nonprofit	43% (184)	59% (251)	96% (406)	25% (106)	7% (29)	100% (425)
Public	55% (413)	45% (340)	81% (607)	15% (114)	4% (32)	100% (753)
City or Town	63% (198)	40% (126)	75% (237)	13% (40)	3% (8)	100% (316)
Single county	46% (209)	46% (209)	91% (410)	11% (48)	4% (16)	100% (450)
Multi-county	46% (157)	63% (216)	88% (299)	34% (116)	10% (33)	100% (340)
1 st Quartile (1 - 3 vehicles)	30% (91)	45% (136)	90% (273)	10% (30)	10% (30)	100% (303)
2 nd Quartile (4 ñ 8 vehicles)	68% (206)	35% (107)	68% (206)	9% (27)	0	100% (304)
3 rd Quartile (9 - 17 vehicles)	60% (182)	57% (172)	90% (274)	27% (81)	0	100% (304)
4 th Quartile (18 - 338 vehicles)	52% (157)	64% (193)	94% (285)	30% (92)	9% (28)	100% (304)

Revenue Sources and Funding Patterns

The mean operating budget for Section 5311 providers was \$822,966 in 2000. This is 2.6 times the mean budget reported in 1994. For public entities, the mean budget was \$1,004,263, while for private nonprofit Section 5311 transit providers, the mean budget in 2000 was \$450,358. This difference – where the mean public body’s budget is 2.2 times that of the mean nonprofit’s – is much greater than in 1994, where public bodies’ budgets were approximately 33 percent more than nonprofits’ budgets.

Fares were collected by 97 percent of Section 5311 providers in 2000, up from 90 percent in 1994. Similarly, fares now account for 18 percent of operating revenues (up from 15 percent in 1994). Fares continue to be a more important source of revenue for public entities than for private nonprofits.

As a source of operating income, Section 5311 assistance no longer is used by the entire network, as had been the case in prior years. Thirteen percent of the Section 5311 network now receives this assistance only for capital assistance. On average, Section 5311 assistance now accounts for 15 percent of rural transit providers’ operat-

ing budgets. This reliance on Section 5311 assistance continues its downward pattern, as transit providers’ budgets have grown and become more diversified in their revenue sources. In 1989, what was then Section 18 accounted for 29 percent of operating budgets; in 1994, this share had declined to 24 percent.

Compared to public entities, reliance on Section 5311 operating assistance continues to be heavier among nonprofit transit providers, for whom this assistance makes up 29 percent of their operating budgets, as compared to 30 percent in 1994.

Funding from state and local governments continue to comprise the leading sources of operating funds for rural transit providers. These funding streams, which include a mixture of dedicated state and local taxes, appropriations of states’ general revenues, and general expenses of city and county governments, have risen in roughly equal proportion to the overall growth of the Section 5311 program.

Eighty-one percent of Section 5311 providers reported receiving some level of state or local transit funding, accounting for 44 percent of their average operating

budget. While the share of state- or locally supported transit systems has decreased from 86 percent of the network in 1994, the portion of their budgets has increased somewhat, from 40 percent at that time (and 34 percent in 1989) to today's 44 percent.

Another way of looking at state and local governments' investments in rural public transportation is that they spent an estimated \$91 million on rural transit in 1989, \$145 million in 1994, and \$431 million in 2000.

This increase in state and local support for rural transit has been invested primarily in public entities. Private nonprofits reported state and local governments' transit spending accounted only for 7 percent of their operating budgets, markedly reduced from the 21 percent share reported in 1994.

Revenue from human services programs continues to play a major role in shaping rural transit providers' operating budgets. Nationwide, these programs provided 15 percent of the funds in operating budgets, which is comparable to their share in 1994. The overall contribution of human services program revenues to the rural transit network was approximately \$50 million in 1994, and has grown to more than \$150 million today. These revenue streams are especially important for nonprofit transit providers; among nonprofits, human resource revenues account for 27 percent of operating budgets, as opposed

to the 13 percent share they represent in public agencies' budgets. This actually is less of a disparity than it was in 1994, when human services programs were 29 percent and 5 percent of private and public transit agencies' budgets, respectively.

Historically, the leading federal sources of human services program spending on rural transit were Medicaid and services funded under the Older Americans Act. Nearly 30 percent of all Section 5311 providers receive some funding from one or the other of these programs; this share increases to 40 percent of all nonprofit Section 5311 providers.

In 2000, the leading source of human service program spending on rural transit was Medicaid, from which Section 5311 recipients reported receiving an estimated total of \$53 million. Next were senior programs, whose rural transit investment was approximately \$41 million. Creation of the Temporary Assistance for Needy Families (TANF) program established the third highest source of human services transit investment; Section 5311 recipients now report a total of \$12 million per year in TANF revenues. While its spending levels on rural transit were too small to warrant reporting in 1994, the federal Head Start program has increased its investment in rural transit, and is now reported to contribute \$5 million a year to the operating budgets of Section 5311 recipients.

Table 5a: Sources of Operating Revenue

(as percentage of operating budget; based on sample of 142 responses)

Funding Source	All Agencies	Public Agencies	Nonprofits
State Transit Funds	23%	27%	5%
Local Transit Funds	21%	25%	2%
Section 5311	15%	12%	29%
Passenger Fares	18%	20%	12%
Human Services Programs	15%	13%	27%
In-Kind Contributions	1%	1%	1%
Other Revenues	12%	10%	22%

Table 5b: Leading Sources of Human Services Funding for Rural Transit

(national estimates, projected from sample of 142 responses)

Medicaid	\$53 million
Older Americans Act programs	\$41 million
Temporary Assistance for Needy Families	\$12 million
Head Start	\$5 million

Patterns in Rural Transit Ridership

Section 5311 transit systems now provide an estimated 154.2 million trips per year. This is 62 percent higher than the 95.2 million annual trips reported in 1994. Agencies serving a single city or town now account for 20 percent of these trips, agencies serving a single county account for 16 percent of trips, and multi-county rural transit systems are delivering 64 percent of all trips. Public agencies are providing 79 percent of all trips; nonprofits now provide approximately 21 percent of the rural transit network's passenger trips.

The portion of the rural population that rides Section 5311 transit service continues to be disproportionately female and "transit-dependent." As reported by transit providers, 62 percent of all trips are made by women, even though the female share of rural population is only 51 percent. Trips by elderly persons account for 31 percent of rural transit service, but only 18 percent of the rural population is aged 60 years or more. Rural transit providers report that 23 percent of their trips are made by persons with disabilities, although Census data report that only 13 percent of rural residents have disabilities. Despite the growth in Section 5311 service, the use of rural transit by women, seniors and persons with disabilities is at the same rates as reported in 1994. Children (i.e., persons 18 years of age or younger) account for 12 percent of all rural transit trips.

As was the case in 1994, the gender difference among rural transit passengers is more pronounced among non-

profits than public agencies; 71 percent of nonprofit rural transit providers' trips are made by women. Similarly, nonprofits' shares of trips by seniors and persons with disabilities exceed the national averages. Seniors account for 59 percent of all nonprofits' trips (up from 49 percent in 1994), and persons with disabilities account for 36 percent of trips (the same share of service as reported in 1994).

With the Section 5311 network's growth toward more service provided by more multi-county agencies, some of these ridership characteristics have experienced notable changes from earlier analyses. Among transit providers serving a single city or town, the share of trips by passengers who are neither elderly nor disabled has shifted downward to 60 percent from the 1994 reported share of 71 percent. Conversely, the share of multi-county providers' trips made by passengers who are neither elderly nor disabled has grown to 64 percent of all trips, up from a 40 percent share in 1994.

Trips by children account for 25 percent of the service provided by transit agencies operating in a single city or town, a share that is more than twice the national average. Trips by senior citizens comprise 47 percent of the service by agencies serving single counties, which is notably higher than the national share of 31 percent. A lower-than-average share of trips by county-wide transit agencies are made by persons who are neither elderly nor disabled: 38 percent, as compared to the national average of 57 percent.

Table 6: Section 5311 Ridership by Type of Agency and Scope of Service
(national estimates of unlinked passenger trips; projected from sample of 106 responses)

	Overall	Public Agencies	Non-profits	City/Town Only	Single County	Multi-County
Number of trips	154 million	122 million	32 million	31 million	24 million	99 million
Females (all ages)	62%	59%	71%	63%	66%	60%
Children	12%	11%	11%	25%	16%	5%
Elderly & Disabled	12%	10%	21%	9%	18%	12%
Other Elderly	19%	13%	38%	20%	29%	15%
Other Disabled	11%	9%	15%	12%	15%	9%
Neither Elderly nor Disabled	57%	68%	26%	60%	38%	64%

The Network

Survey respondents were asked to estimate the distribution of their service by trip purpose. Overall, the leading categories of trip purpose among rural transit passengers were:

- To and from work (33 percent of trips) or job training (4 percent); together, these categories accounted for 20 percent of trips in 1994;
- Trips related to health care, nutrition program, or other human services (25 percent, up from 17 percent in 1994), of which medical trips alone now account for 12 percent of all rural public transit service;
- Shopping, recreational trips, errands and other personal or family business (18 percent of trips); and
- Trips to or from school or child care (12 percent and 2 percent of trips, respectively).

The major reliance on rural public transit as a means for persons to receive medical care is nothing new, although the estimated 18.5 million medical trips provided this year by the Section 5311 network represents an all-time high (rural transit providers reported 13 million medical trips in 1994).

Since 1994, there has been tremendous growth in the use of rural public transit as a means for people to access employment. Taken together, trips to work and trips to job training programs now make up 37 percent of rural transit service, representing approximately 57 million trips, compared to 19 million such trips in 1994. By far, the largest share of trips to work and to job training programs are provided by countywide and multi-county rural transit providers; together, these transit agencies provided 52 million of those trips, or more than 90 percent of all employment-related rural transit service (the share of this service provided by countywide and multi-county providers in 1994 was 72 percent of these trips).

Trips to school were the largest single reported trip purpose among rural public transit providers serving single cities and towns. These school-related trips accounted for 24 percent of all service among single city/town transit agencies. Overall, Section 5311 agencies reported that 12 percent of their trips, approximately 18.5 million trips during the year, were school-related, and 2 percent were to child care services, figures which seem consistent with the reported 12 percent share of rural transit trips made by persons 18 years of age or younger.



Section V: The Fleets

With the increase in Section 5311 funds, which can be used for up to 80 percent of capital expenses, providers have increased their fleet sizes in the past six years by almost four vehicles per agency.

The 150 respondents who provided data on their vehicle fleet reported information on 2285 vehicles, suggesting a total rural transit fleet of 19,185 vehicles, an increase of almost 60 percent since 1994. The largest half of the providers is primarily responsible for the growth: agencies in the smallest quartile continue to operate one to three vehicles apiece.

Table 7: Changing Fleet Sizes

	Mean Fleet Size	Median Fleet Size
1988	9	6
1994	11	6
1998	17.5	9

Fleet composition is relatively constant across the quartiles. Vans and small buses together account for three-fourths of the total network, and small vehicles (seating fewer than 8 passengers) represent another 10 percent. Further information on individual vehicle types follows.

Table 8: Fleet Composition by Quartile

	Small vehicle	Van	Small bus	Medium bus	Large bus	TOTAL
1 st quartile (1-3 vehicles)	23%	47%	27%	1%	1%	100%
2 nd quartile (4-8 vehicles)	10%	44%	30%	16%	0	100%
3 rd quartile (9-17 vehicles)	8%	46%	26%	16%	5%	100%
4 th quartile (18+ vehicles)	9%	57%	21%	7%	5%	100%
ALL SYSTEMS	10%	53%	23%	9%	4%	100%

Fleet Composition by Quartile

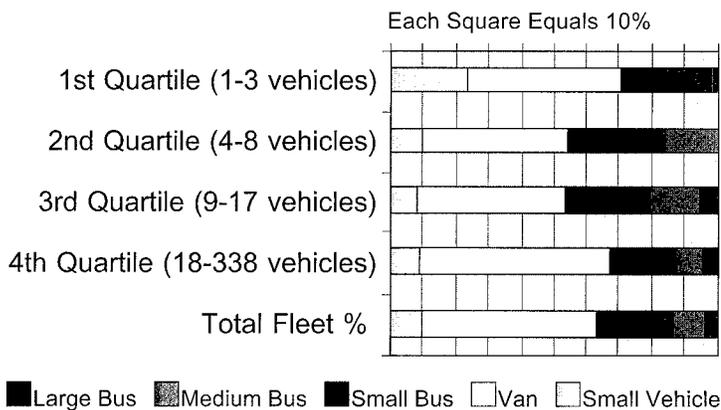
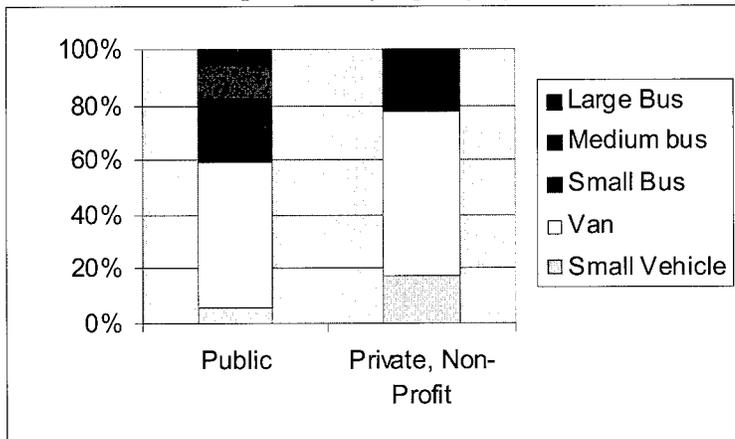


Table 9: Fleet Composition by Agency Type



Small Vehicles (Fewer than 8 passengers)

Small vehicles, seating fewer than 8 passengers, are almost 10 percent of the reported fleet. There are an estimated 1,823 in service across the network. Non-profit agencies make slightly more use of these vehicles than public agencies. One third of the small vehicle fleet is accessible, and more than two thirds of the fleet is more than 4 years old.

Table 10: Small Vehicles

	Sample Report	Estimated Percent of Fleet
Small Vehicles	216	10%
1 st Quartile (1-3 vehicles)	17	23%
2 nd Quartile (4-8 vehicles)	23	10%
3 rd Quartile (9-17 vehicles)	32	8%
4 th Quartile (18-338 vehicles)	144	9%
Public	108	7%
Private, Non-Profit	103	18%
Lifts/Ramps	73	34%
More than 4 years old	143	68%

Vans (8-15 passengers)

Half of the Section 5311 fleet consists of vans, seating 8 -15 passengers. An estimated total of 10,168 vans are in service, more than half of which are accessible, and almost 60 percent of which are more than 5 years old.

Table 11: Vans

	Sample Report	Estimated Percent of Fleet
Vans	1221	53%
1 st Quartile (1-3 vehicles)	35	47%
2 nd Quartile (4-8 vehicles)	103	44%
3 rd Quartile (9-17 vehicles)	188	46%
4 th Quartile (18-338 vehicles)	897	57%
Public	852	53%
Private, Non-Profit	335	58%
Lifts/Ramps	686	56%
More than 5 years old	719	59%

Small Buses (16-24 passengers)

Small buses, seating 16-24 passengers, account for almost one quarter of the fleet, with an estimated 4,413 small buses in service. Almost two-fifths of the fleet is more than 7 years old. Four-fifths of this fleet is accessible.

Table 12: Small Buses

	Sample Report	Estimated Percent of Fleet
Small Buses	526	23%
1 st Quartile (1-3 vehicles)	20	27%
2 nd Quartile (4-8 vehicles)	71	30%
3 rd Quartile (9-17 vehicles)	107	26%
4 th Quartile (18-338 vehicles)	328	21%
Public	383	24%
Private, Non-Profit	118	20%
Lifts/Ramps	433	82%
More than 7 years old	215	41%

Medium Buses (25-35 passengers)

There are an estimated 1,727 medium buses, seating 25 - 35 passengers, in service, making them slightly less than 10 percent of the fleet. Two-thirds of the buses are equipped with ramps, and one-third of them are more than 10 years old.

Table 13: Medium Buses

	Sample Report	Estimated Percent of Fleet
Medium Buses	218	9%
1 st Quartile (1-3 vehicles)	1	1%
2 nd Quartile (4-8 vehicles)	37	16%
3 rd Quartile (9-17 vehicles)	64	16%
4 th Quartile (18-338 vehicles)	116	7%
Public	177	11%
Private, Non-Profit	23	4%
Lifts/Ramps	134	62%
More than 10 years old	74	34%

Large Buses (More than 35 passengers)

Large buses are a very small part of the Section 5311 fleet, with only an estimated 767 in service. Their use was reported exclusively by public and tribal respondents, who indicated that 60 percent of the large buses were accessible and one fourth of them were more than 12 years old.

Table 14: Large Buses

	Sample Report	Estimated Percent of Fleet
Large Buses	102	4%
1 st Quartile (1-3 vehicles)	1	1%
2 nd Quartile (4-8 vehicles)	0	0
3 rd Quartile (9-17 vehicles)	22	5%
4 th Quartile (18-338 vehicles)	79	5%
Public	99	6%
Private, Non-Profit	0	0
Lifts/Ramps	64	63%
More than 12 years old	27	27%

Accessibility by Agency Type

Many 5311 vehicles are not required to provide lift or ramp access. Under the Americans with Disabilities Act, providers with demand-responsive service must be able to provide an accessible vehicle as needed. Fixed route services, on the other hand, must be 100 percent accessible.

The providers surveyed reported that sixty percent of the sample fleet is lift or ramp equipped, a significant increase from the 40 percent reported in 1994.

Table 15: Lift or Ramp Equipped Vehicles by Agency Type

	Sample Report	Percentage
Public Vehicles	1060	64%
Private, Non-Profit Vehicles	285	47%
Vehicles with Agency Type Unspecified	48	92%
TOTAL	1411	60%

Annual Replacement Need

In contrast to other Federal Transit programs, States hold the responsibility for setting useful life standards for vehicles and vehicle replacement under the 5311 program. Loosely following a year 2000 survey of the state Departments of Transportation, we have applied estimated life expectancies as follows:

Small Vehicles	4 years
Vans	5 years
Small Buses	7 years
Medium Buses	10 years
Large Buses	12 years

Using these estimates, more than one-sixth of the reported Section 5311 fleet vehicles reach their recommended retirement age each year, and one-half of the existing fleet is already beyond the limit of recommended use. This translates into an estimated 9,890 already over-age vehicles and an additional 3,392 vehicles requiring replacement each year.¹

Table 16: An Aging Fleet

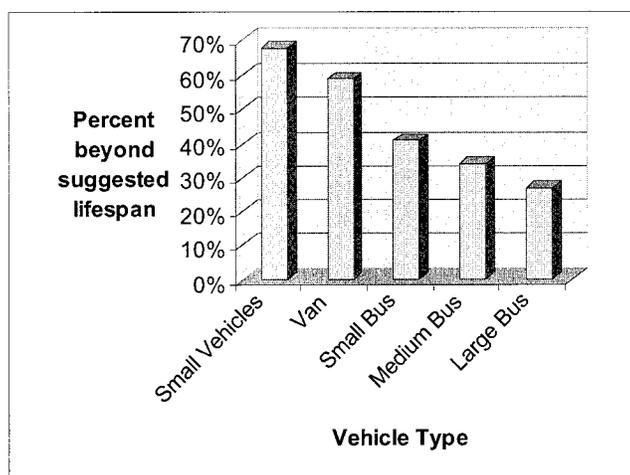


Table 17: Annual Replacement Need

	Suggested Lifespan	Annual Replacement Need in Sample	Projected Total Replacement Need
Small Vehicles	4 years	54	453
Vans	5 years	244	2048
Small Buses	7 years	75	630
Medium Buses	10 years	22	185
Large Buses	12 years	9	76
Annual Total		404	3392

¹ Note that the methodology for estimating replacement need has changed since the 1994 report. At that time, an estimate of a four-year life expectancy was used for vans and small buses, seven years for medium buses, and 12 years for large buses. Under the 1994 suggested lifespans, 12,200 vehicles, or two-thirds of the current fleet, would be beyond the limit of recommended use and 4,256 vehicles would require replacement each year.

Section VI: Maintenance and Administrative Facilities

Maintenance Facilities

Although the number of maintenance facility owners increased since 1994, the majority of providers continue to send their vehicles out for maintenance, often to either the private sector or government agencies. Only public agencies predominantly own their own maintenance facilities; non-profit agencies overwhelmingly contract out their maintenance. Four-fifths of the providers with in-house maintenance were satisfied with their facilities. Almost one-third of all providers reported definite plans to invest in expanding, replacing or building a facility, an increase from the twenty-one percent that reported such plans in 1994.

Table 18: Maintenance Options

	Sample Report	Percent
Own	63	42%
Rent/Lease	9	6%
Send out	78	52%

Table 19: Ownership or Rental of Maintenance Facility by Agency Type

	Own	Rent/Lease	Send Out	No Response
Public	50	7	36	1
Private, Non-Profit	12	2	38	1

Table 20: Mean Size of Maintenance Facilities

	Mean Size in Square Feet
National Average	10,136
Own	11,359
Rent/Lease	51,877

Table 21: Condition of Maintenance Facilities

	Excellent	Good	Fair	Poor	Very Poor
National Average	30%	50%	0	19%	1%
Own	20 (33%)	31 (51%)	0	10 (16%)	0
Rent/Lease	1 (11%)	4 (44%)	0	3 (33%)	1 (11%)

Table 22: Percentages of Providers Reporting Maintenance Facility Investment Plans

	Sample Report	Percent
Expand Facility	17	11%
Replace Facility	8	5%
Acquire Facility	20	13%

Administrative Facilities

The majority of Section 5311 providers own their administrative facilities and to consider them adequate, although owners tended to express more satisfaction than renters.

Table 23: Administrative Facility Ownership

	Sample Report	Percent
Own	89	60%
Rent/Lease	60	40%

Table 24: Administrative Facility Ownership by Agency Type

	Own	Percent
Public	59	64%
Private, Non-Profit	27	52%

Table 25: Satisfaction with Administrative Facility

	Sample reporting adequacy of Administration Facilities	Percent
Own	63	71%
Rent/Lease	32	53%



VII: Description of the Workforce

Workforce Overview

The Section 5311 network encompasses 29,000 employees, almost twice its reported workforce in 1994, supplemented by 21,000 volunteers. The number of full-time employees more than doubled from 1994, and the number of part-time employees increased by half.

Table 26: Total workforce

	Sample Total	Projected Total
Full-time	2170	17577
Part-time	1413	11445
TOTAL	6282	29,002

Although the number of employees increases directly with increases in fleet size, the relative proportions of full-time and part-time labor change. Providers in the third fleet quartile, who have 9 to 17 vehicles, make the most use of part-time employees.

Table 27: Workforce Composition by Fleet Size Quartile

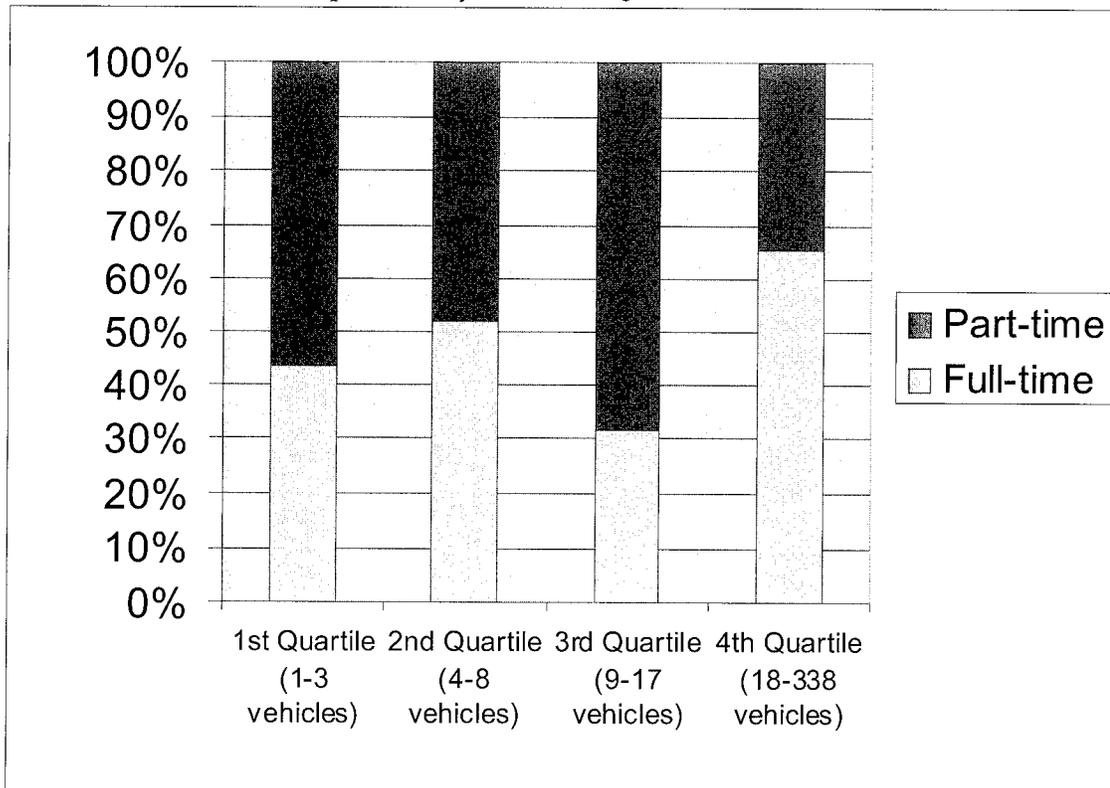


Table 28: Reported Workforce by Fleet Size Quartile

	Full-time	Part-time	Total
1 st Quartile (1-3 vehicles)	84	108	219
2 nd Quartile (4-8 vehicles)	198	180	425
3 rd Quartile (9-17 vehicles)	454	960	1454
4 th Quartile (18-338 vehicles)	1371	736	3460

Description of the Workforce

Table 29: Average Workforce Size and Composition by Agency Type

	Full-time	Part-time
Public	13	10
Non-Profit	11	7

Volunteers

Sixteen percent of the Section 5311 providers used volunteer support. They use a projected 21,700 volunteers nationally—more than twice the number reported in 1994. Eight percent of the providers reported no full-time employees, relying entirely on part-time staff and volunteers to provide services. Among all providers, non-profits and agencies operating in the most rural areas (single county providers) are the most likely to use volunteers.

Table 30: Volunteers

	Sample Report	Projected
Volunteers	2679	21700

Table 31: Percentage of providers using volunteers by agency type

Public Providers	9	10%
Non-Profit Providers	16	30%

Table 32: Percentage of providers using volunteers by service area type

	Sample Report	Percent
City/Town Providers	3	7%
Single County Providers	10	18%
Multi-County Providers	8	7%

Driver Wages

Across the Section 5311 network, the mean starting wage for drivers was \$7.43 per hour, and the mean top wage was \$9.66 per hour. Mean wages were higher for public agencies than non-profits. Agencies operating within city/town limits paid significantly higher wages than agencies with countywide or multi-county operations.

As a rule, median drivers' wages were lower than the means. This can be explained by examining the distribution of wages across the network. Starting wages for

drivers exceeded \$12.00 per hour among 3.7 percent of the sample pool, with one transit provider reporting a starting wage of \$18.78. These few very high starting wages were in contrast with 32.8 percent of the sample pool, who reported starting wages of \$6.00 per hour or less. Among the sample, 7.5 percent reported starting drivers' wages at or below the federal minimum wage of \$5.15 per hour.

Table 33: Mean and Median Driver Wage Ranges

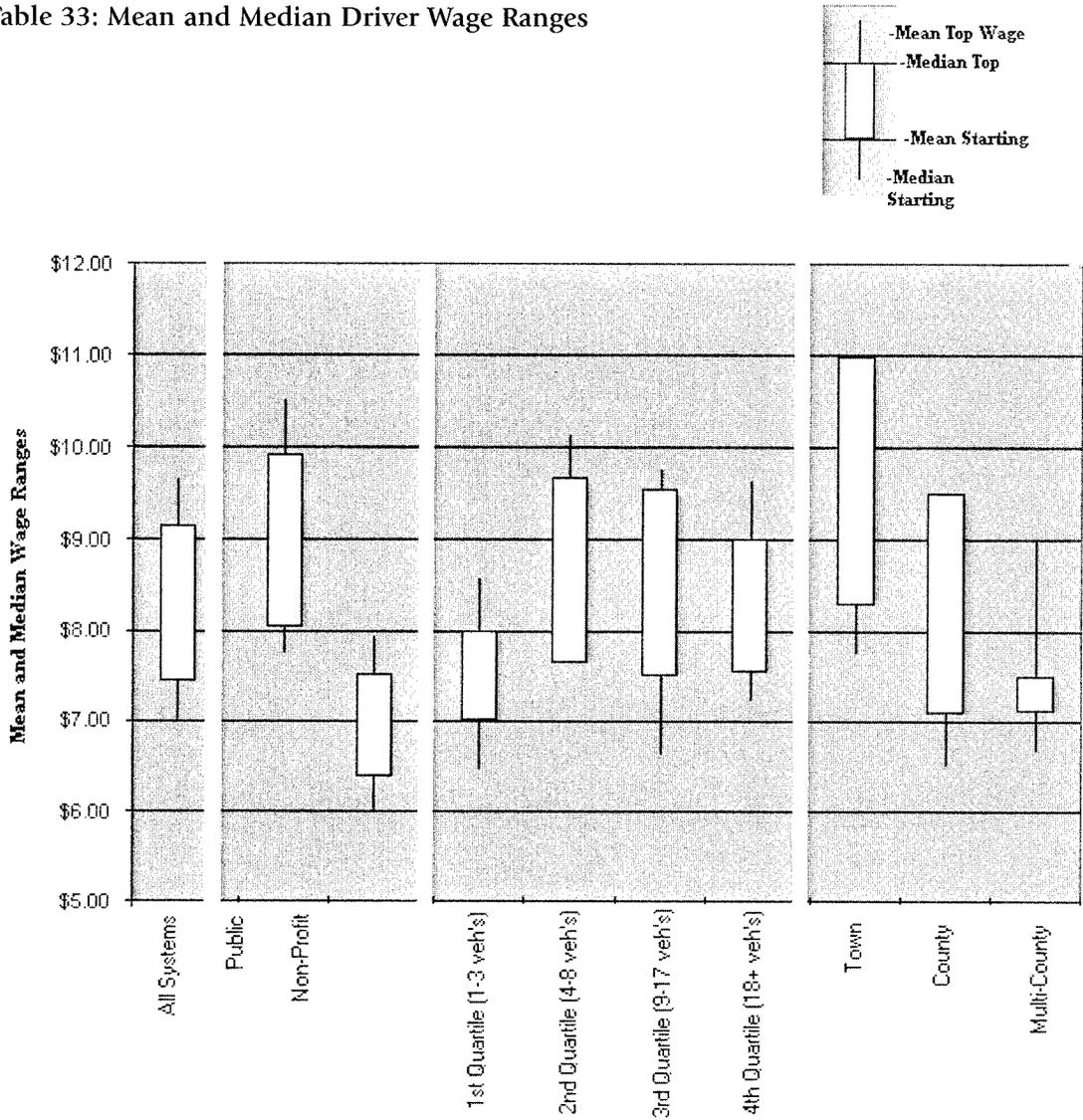


Table 34: Mean and Median Driver Wages

	Mean Starting	Median Starting	Mean Top	Median Top
All Systems	\$7.43	\$7.00	\$9.66	\$9.16
Public	\$8.03	\$7.75	\$10.51	\$9.93
Non-Profit	\$6.37	\$6.00	\$7.94	\$7.51
1 st Quartile (1-3 vehicles)	\$6.99	\$6.45	\$8.58	\$8.00
2 nd Quartile (4-8 vehicles)	\$7.63	\$7.69	\$10.14	\$9.67
3 rd Quartile (9-17 vehicles)	\$7.49	\$6.63	\$9.76	\$9.54
4 th Quartile (18-338 vehicles)	\$7.53	\$7.22	\$9.63	\$9.00
Town	\$8.28	\$7.75	\$10.78	\$10.98
County	\$7.08	\$6.50	\$8.34	\$9.50
Multi-County	\$7.11	\$6.67	\$8.99	\$7.50

Section VIII: Extrapolated Service Overview

The total fleet of 19,185 Section 5311 vehicles delivers a projected 154 million trips over 474 million miles each year. This represents a 93 percent increase in miles traveled and a 62 percent increase in passenger trips since 1994. The total projected budget for Section 5311 providers is roughly estimated at \$960 million.

Table 35: Overview

	Numbers:
Sample Total Fleet	2,662
Projected Total Fleet	19,185
Sample Vehicle-Miles	59,262,721
Projected Total Vehicle-Miles	473,711,882
Sample Passenger Trips	19,674,378
Projected Total Passenger Trips	154,221,737
Sample Vehicle-Hours	5,098,299
Projected Total Vehicle Hours	452,14,841
Sample Total Operating Budget	\$123,371,095
Projected Total Operating Budget	\$960,871,035 (n=156)

NOTE: Due to inconsistent responses within the sample, the total budget figures should be regarded only as rough estimates. Because of the unreliable budget data, costs per trip, mile, and passenger are not provided here.

Contracts

Ten percent of Section 5311 subrecipients do not provide any actual transportation services. While they are responsible for service design and related planning, they contract with one or more other agencies or companies to deliver the rides. Another 9 percent of the 5311 network contracts some portion of their operation, such as night or weekend services, to other providers. Providers with the largest fleets make the most use of contracting.

Table 36: Contracts

	All Contracts	Some Contracts	No contracts
All Systems	10%	9%	82%
Non-Profit	6%	8%	86%
Public	13%	9%	79%
Quartile 1 (1-3 vehicles)	5%	3%	90%
Quartile 2 (4-8 vehicles)	5%	8%	87%
Quartile 3 (9-17 vehicles)	13%	5%	79%
Quartile 4 (18-338 vehicles)	16%	16%	64%