

Current State of the Public Transportation Industry and Issues Facing the Industry

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**Transportation Research Board
Executive Committee Policy Session
January 10, 2018**

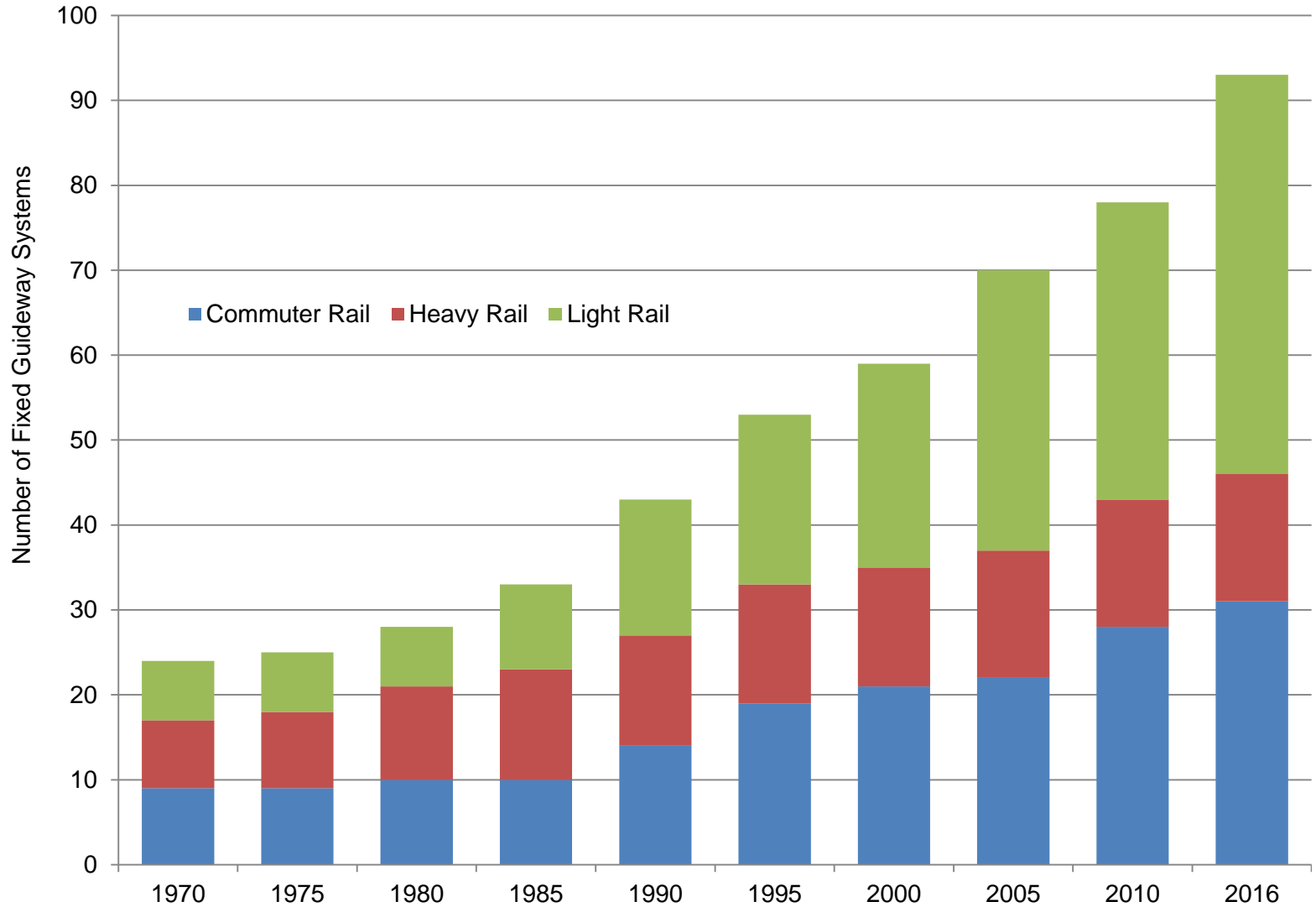


Public Transportation in the U.S.

- 35 million boardings every weekday
- 10.4 billion annual trips in 2016
- 48% on Bus; 47% by Rail; 5% other
- \$68 billion a year industry in U.S.
- 73% of dollars flow to private sector
- More than 400,000 employees
- Supports an additional 2 million jobs

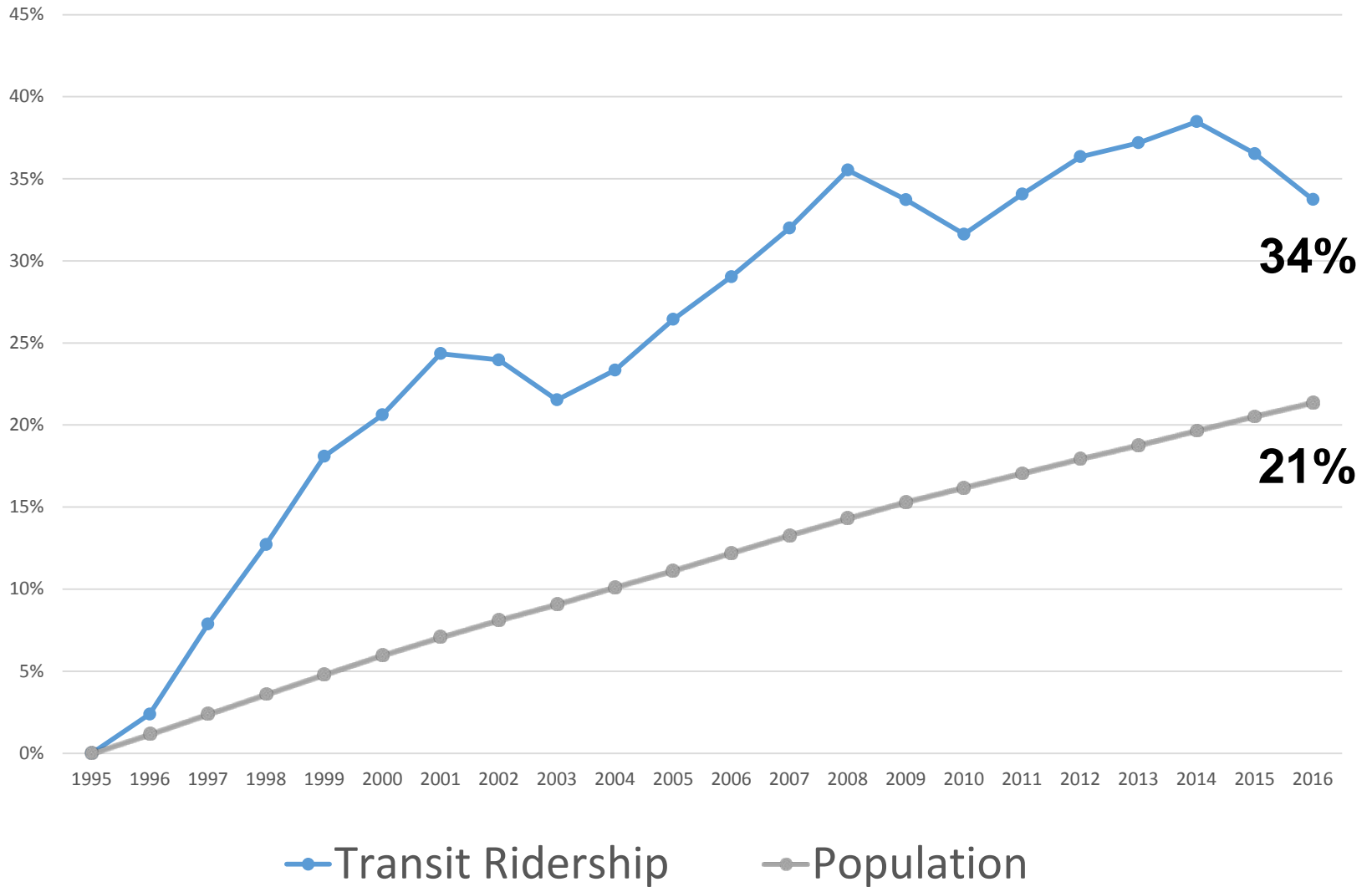


The Number of Rail Transit Systems Has Quadrupled Since 1970



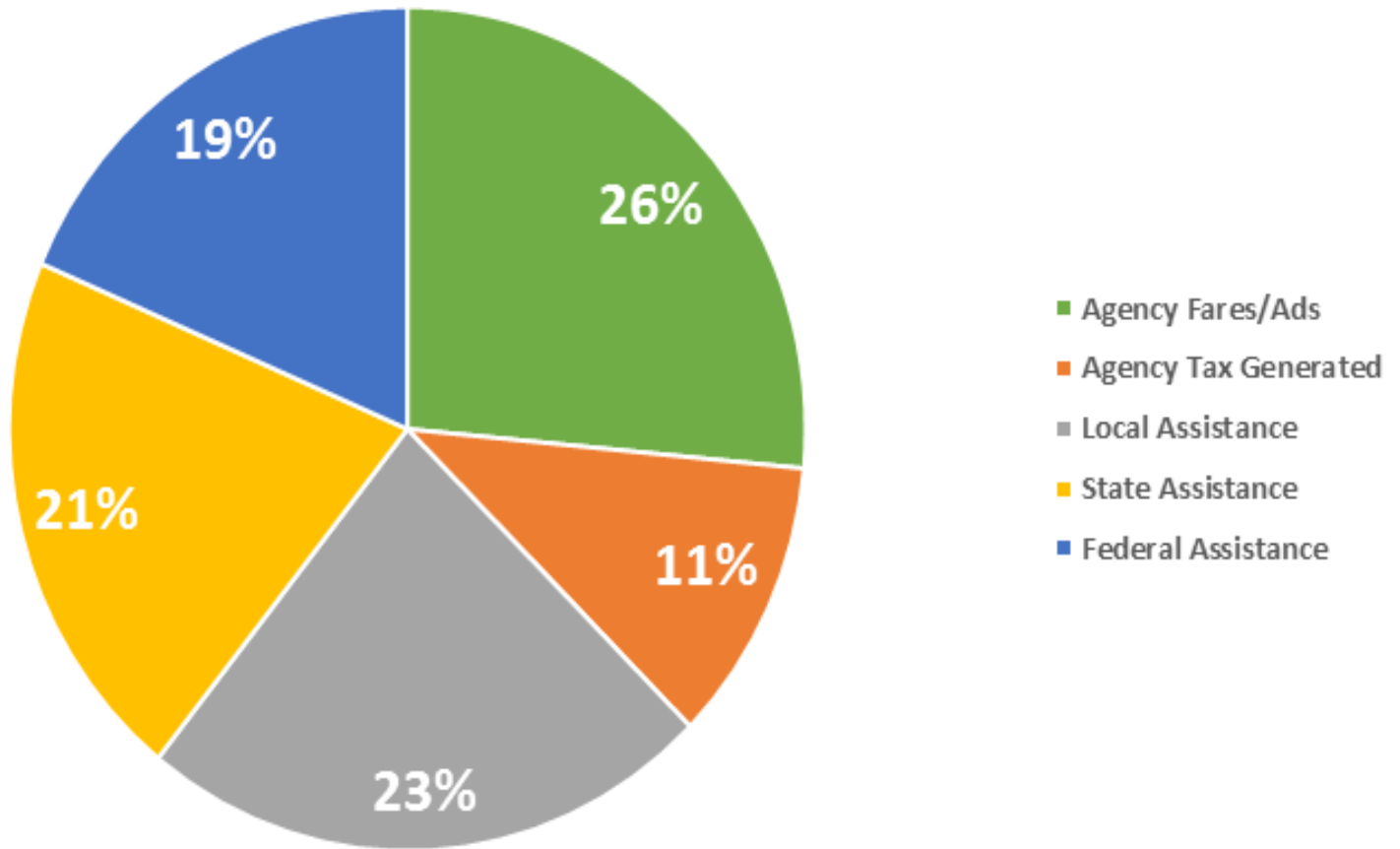
Twenty-year trend has been strong.

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



Industry Revenue Sources (2015)

(Capital and Operating Funding Sources Combined. Total: \$68bn)



Local Transit Ballot Measures

- 74% approval rate over the past fifteen years
- 88% approval rate in 2017
- \$170 billion for transit approved on November 8, 2016 alone
- Regions large and small; bus and rail; north, south, east and west



WHO RIDES PUBLIC TRANSPORTATION



87%

of public transit trips are to earn money or to spend money.



THE BACKBONE
OF A MULTIMODAL
LIFESTYLE

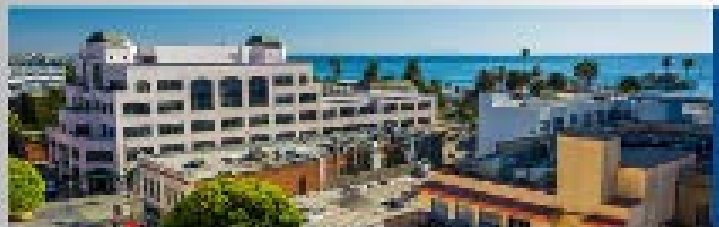
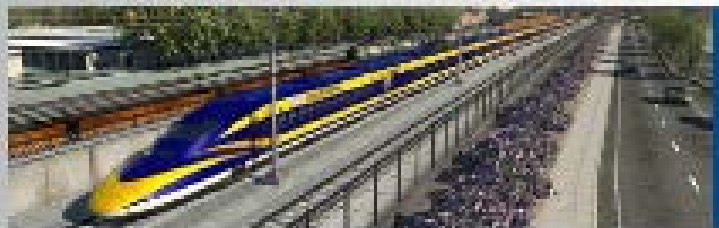
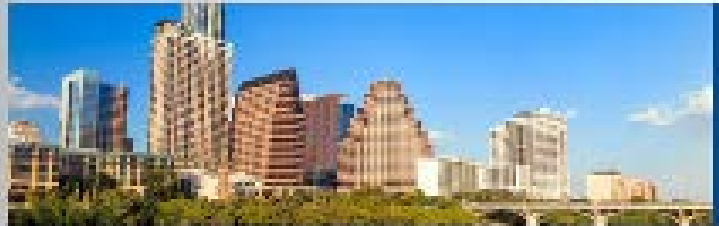
PASSENGER DEMOGRAPHICS & TRAVEL

Amazon is one of many companies seeking transit-rich locations

- Accenture
- Active Network
- AmTrust Financial Services
- Angie's List
- AT&T
- Banner Health
- Baxter
- Biogen
- BrownFlynn
- Caresource
- Catholic Health
- Cisco/Meraki Networks
- Citizens Property Insurance
- Comcast
- Converse
- Deloitte
- eBay
- EnverVest
- Expedia
- Facebook
- General Electric
- Gogo Inc.
- Google
- HBO
- HKS Architects
- Independence Blue Cross
- Kaiser Permanente
- Kraft Foods
- Liberty Mutual
- Marriott
- McDonalds
- Microsoft
- Motorola
- Nationwide
- New Balance
- Partners Healthcare
- PNC Bank
- Panasonic
- State Farm Insurance
- United Airlines
- Verizon
- And the list is growing each month.....



Public Transportation's Role in the Knowledge Economy





MILLENNIALS & MOBILITY:

UNDERSTANDING
THE MILLENNIAL
MINDSET





Transit – TNC Partnerships

- **First Mile / Last Mile** (Dallas, Atlanta, Miami, BART...)
- **Low Density Service** (St. Pete, FL)
- **Demand Response** (Boston, York, PA)



Many examples of transit innovation ...

Automated shuttles

Las Vegas

Jacksonville

Austin

Tampa

Gainesville

Phoenix

Reno

Reimagining Bus Service

Columbus

Orange County, CA

Jacksonville

Sacramento

Houston

Austin

Oakland

FTA-Funded Mobility on Demand Pilot Projects

Tucson

Phoenix

Palo Alto

Los Angeles

San Francisco

Pinellas County, FL

Chicago

Portland, OR

Dallas

Vermont

Pierce County, WA

Microtransit

LA Metro

Oakland

Clean-Fuel Buses

Over 50% of the nation's transit bus fleet



State of Good Repair / Modernization:

Strong demand for public transit expansion... but also need for infrastructure renewal

- **Older transit systems in greatest need:**
Washington, DC ... New York City ... Boston ... Chicago ... Philadelphia
- **U.S. government finds:**
40% of buses and **25%** of rail “*marginal or poor*”
* *Add civil engineers rating*
- **Current backlog to achieve state of good repair:**
\$95 billion
- **Amount needed to meet current needs:**
\$43 billion per year

A vertical sidebar on the left side of the slide contains eight circular icons. From top to bottom: a blue circle with a white boat icon, a solid pink circle, a red circle with a white bus icon, a blue circle with a white train icon, a solid white circle, a red circle with a white train icon, a red circle with a white bus and wheelchair icon, and a white circle with a red and blue APTA logo.

Public Transportation: Backbone of a multi-modal lifestyle

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