

ATL BOARD OF DIRECTORS MEETING

NOVEMBER 7, 2019



NOVEMBER BOARD MEETING

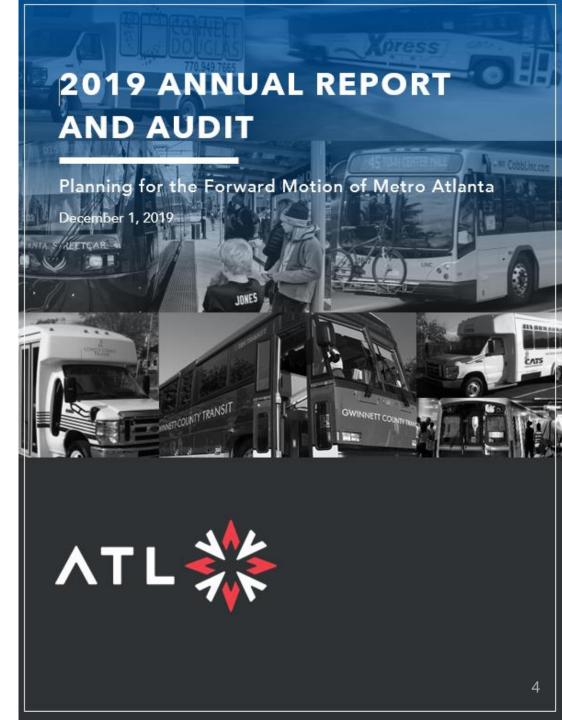
Alanna McKeeman, Foursquare ITP Naomi Stein, EDR Group David Miller, Foursquare ITP



ATL Annual Report and Audit

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)

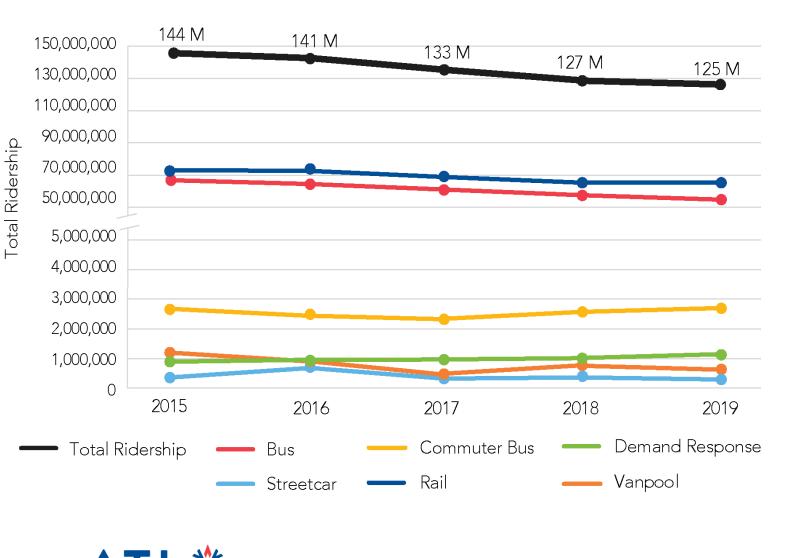
- Develops a baseline for future comparison
- Starting point to provide recommendations for improvements or future investments in the region
- Enables benchmarking to compare Atlanta to peer regions



RIDERSHIP

- 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.



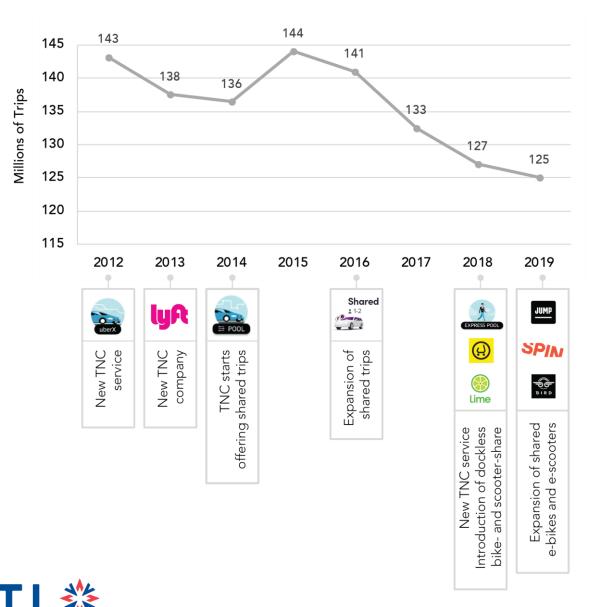


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RIDERSHIP

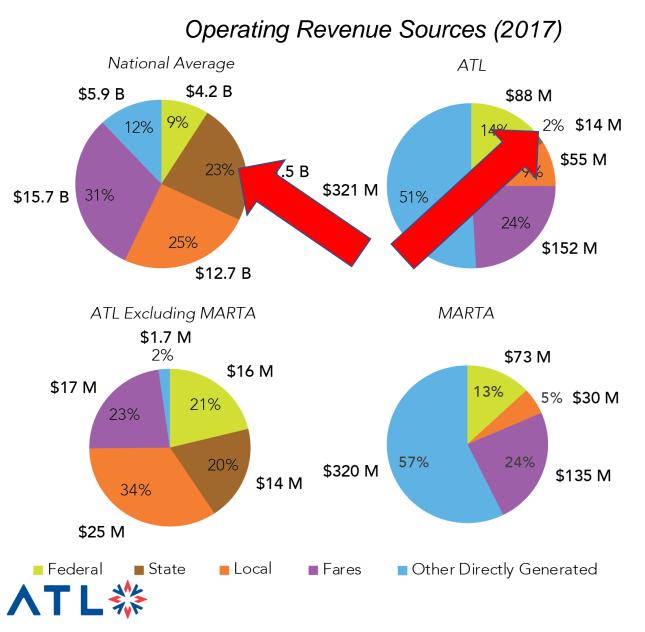
Transit ridership and new mobility milestones in the region

- 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



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.



LEVEL OF INVESTMENT: OPERATING EXPENDITURES PER CAPITA

- ► Transit operating expenditures per capita have fluctuated year over year.
- Average growth between 2015 and 2019 is below inflation rate.
- By comparison, the average expenditures per capital in metro areas of 2 million or more people was \$137 in 2017.

Fiscal Year	2015	2016	2017	2018	2019
Operating cost per capita	\$105.58	\$111.33	\$99.40	\$105.37	\$108.62

ON-TIME PERFORMANCE AND INVESTMENT IN TRANSIT PRIORITY INFRASTRUCTURE

100%

80%

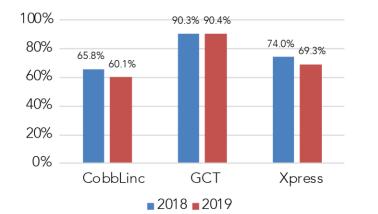
60%

40%

20%

0%

- On-time performance in 2019 ranged from 60 percent on some bus routes to 97 percent on rail.
- On-time performance for some buses declined significantly between 2018 and 2019.
- The region has 65 miles of express lanes and nearly 48 miles of heavy rail track.



Fixed-Route Bus

74.0% 72.3%

GCT

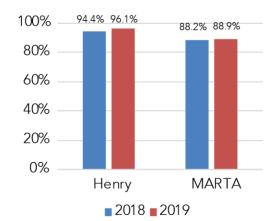
2018 2019

78.5% 77 7%

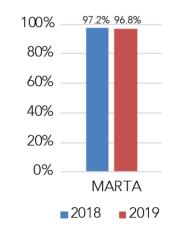
MARTA

Commuter Bus

Demand Response



Rail



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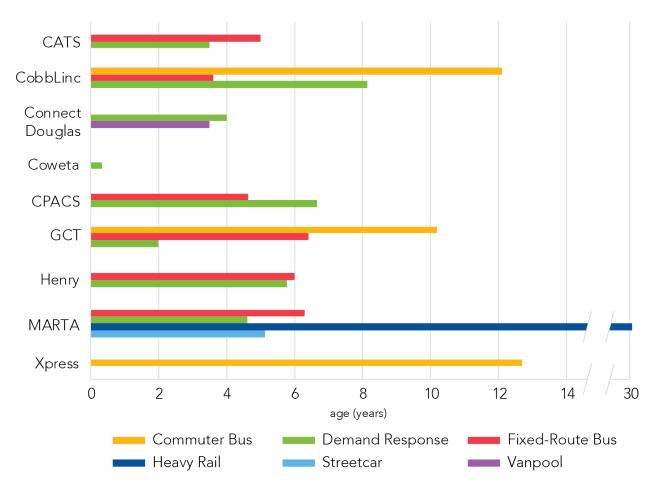
CobbLinc

N/A

67.0%

STATE OF GOOD REPAIR

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

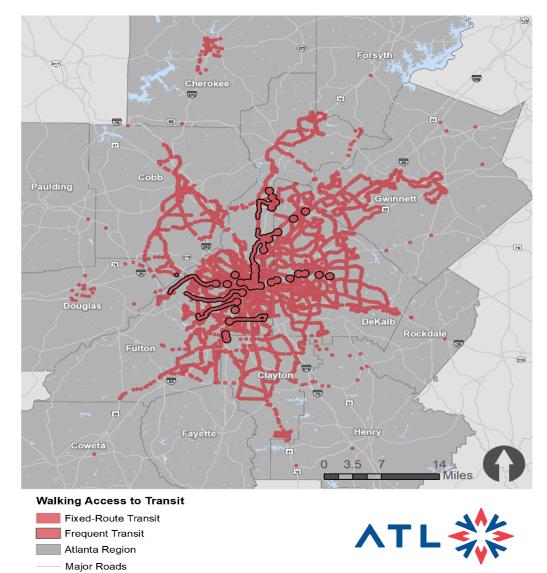


Average fleet age (2019)

EQUITY: ACCESS TO TRANSIT

- Access to fixed-route transit is strongly correlated with access to opportunity.
- Within walking distance of fixed-route transit:
 - Total population: 26%
 - Minority population: 33%
 - Low-income households: 38%
- Within walking distance of <u>high-</u> <u>frequency</u> transit (15-minute average headways or better):
 - Total population: 4%
 - Minority population: 4%
 - Low-income households: 6%

Fixed-route and frequent transit access area





WORKSHOP FEEDBACK – WHAT WE HEARD

- Consider transit travel speeds and time competitiveness
- Consider perceptions of safety (crime)
- Interest in mode split, more accessibility analysis, and TNC and new micromobility impacts on ridership
- Consider the region's density and need for coordinated land use and transportation planning



Economic and Regional Impact

UNDERSTANDING AND MEASURING THE VALUE OF TRANSIT

Identify Sources of Value

• How does transit support people and business in the ATL region?

Stimulus Effects

• How do agency expenditures support regional jobs?

Transit Commuters

• What industries depend on transit for access to workers?

The Value of Choice

• How does transit help individuals and the region avoid costs?

Accessibility

• How does access by mode compare across the region?



SOURCES OF VALUE - WHAT MATTERS TO THE REGION?



IMPACTS OF TRANSIT AGENCY OPERATIONS & EXPENDITURES

MULTIPLIER EFFECTS IN THE 13-COUNTY ATL REGION:



In FY	18:
-------	-----

Expenditure Type:	Jobs	l	Income	Value Added	Output
Operations & Maintenance		11,156	\$689 M	\$912 M	\$1,578 M
Capital		1,597	\$95 M	\$141 M	\$237 M

Source: Research team analysis using TREDTransit[™] and budget information from individual transit agencies.



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

Transit commute share, regionwide

4%

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.

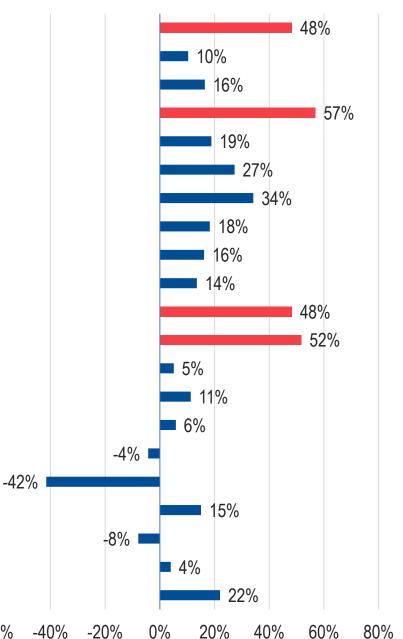


OUTLOOK FOR INDUSTRIES WITH LARGE NUMBERS OF TRANSIT COMMUTERS

- Top 20 industries with the most transit commuters
- Projected employment growth (2017-2040)
- Service sector jobs whose workers often rely on transit are growing faster than regional average

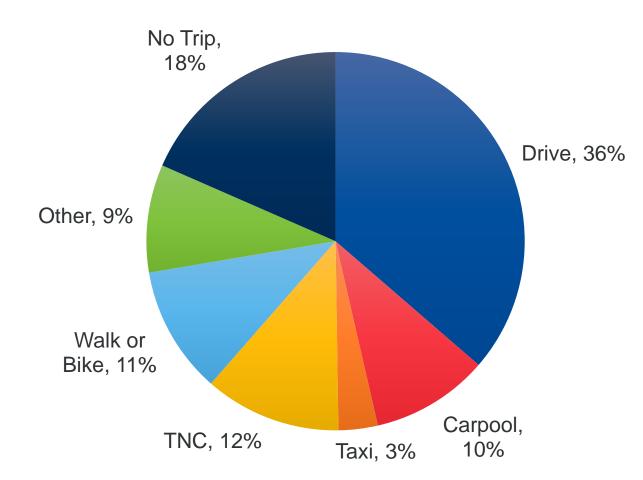






Source: Moody's Economy.com.

VALUE OF CHOICE: TRANSIT AND ALTERNATIVE MODES



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

- > 80 MILLION forgone trips (linked)
- > 2.1 BILLION more vehicle miles on the road (4% 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	158.0 M	\$579.7 M
Drive (high)	\$5.55	158.0 M	\$876.8 M
Тахі	\$21.31	14.6 M	\$310.6 M
TNC	\$12.78	50.8 M	\$649.1 M

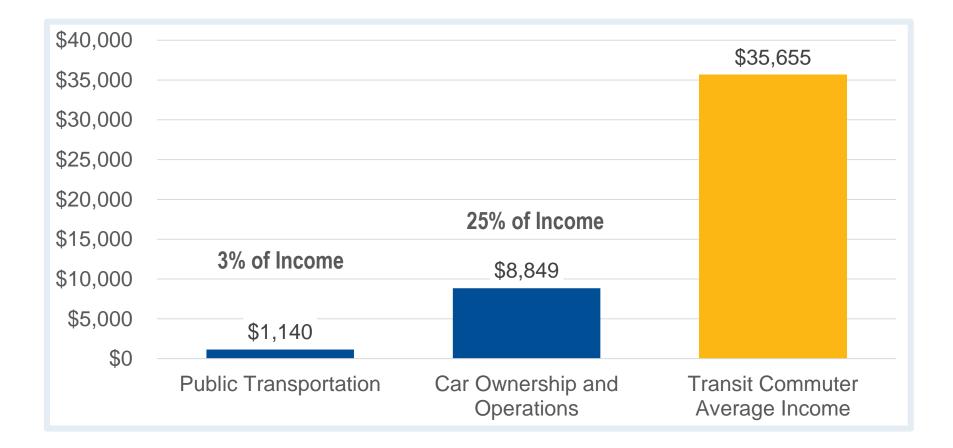
Cost Sources: USDOT BCA Guidance, AAA, Taxifarefinder.com, Taxis-fare.com

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

VOC	NO _X	РМ	CO ₂
772	594	104	839,081

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

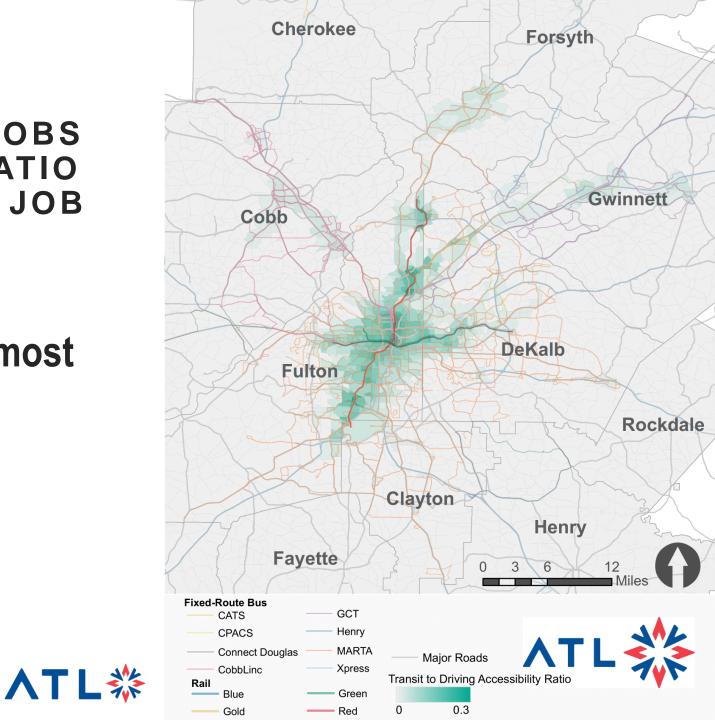


SOURCE: Public transportation costs calculated as twelve 30-day MARTA passes (\$95 each); Car ownership and operations from AAA at 15,000 miles per year. Transit commuter average income from research team analysis using 2013-2017 American Community Survey 5-Year Estimates, Public Use Microdata Sample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



REGIONAL ACCESS TO JOBS WITHIN 45 MINUTES – RATIO OF TRANSIT ACCESS TO JOB ACCESS

Job access by transit is at most 30% of that by car.



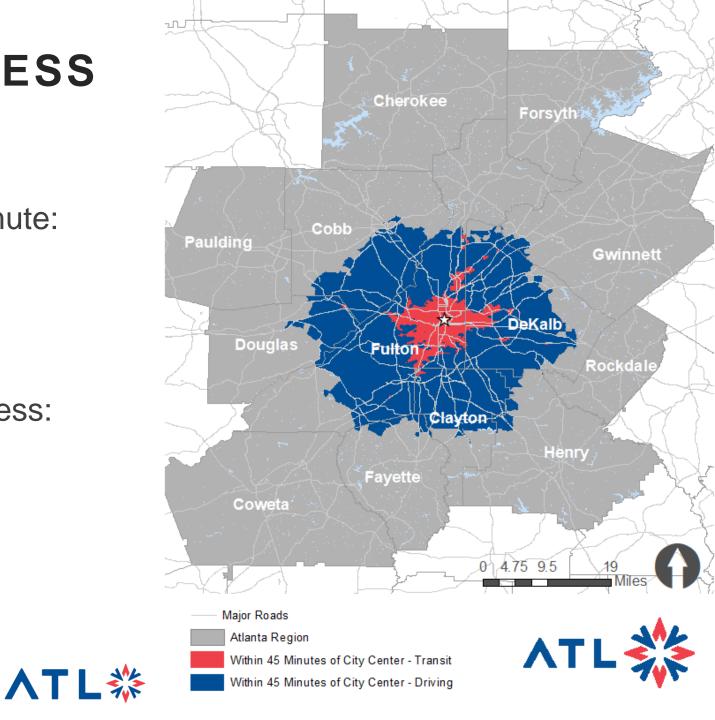
LABOR MARKET ACCESS CITY CENTER

Population within a 45-minute commute:

Driving: 1,771,570

Transit: 307,219

Ratio of Transit Access to Drive Access: 0.17

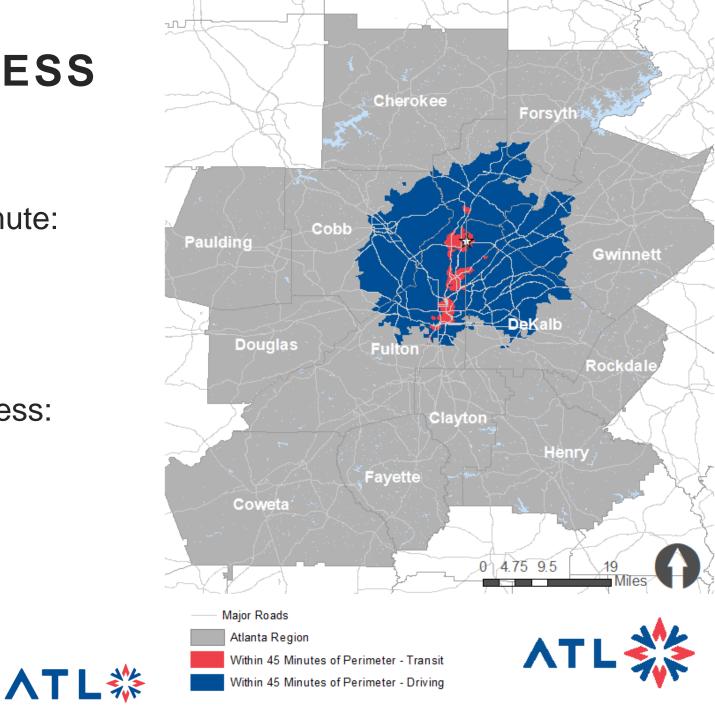


LABOR MARKET ACCESS PERIMETER

Population within a 45-minute commute:

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

Ratio of Transit Access to Drive Access: 0.09

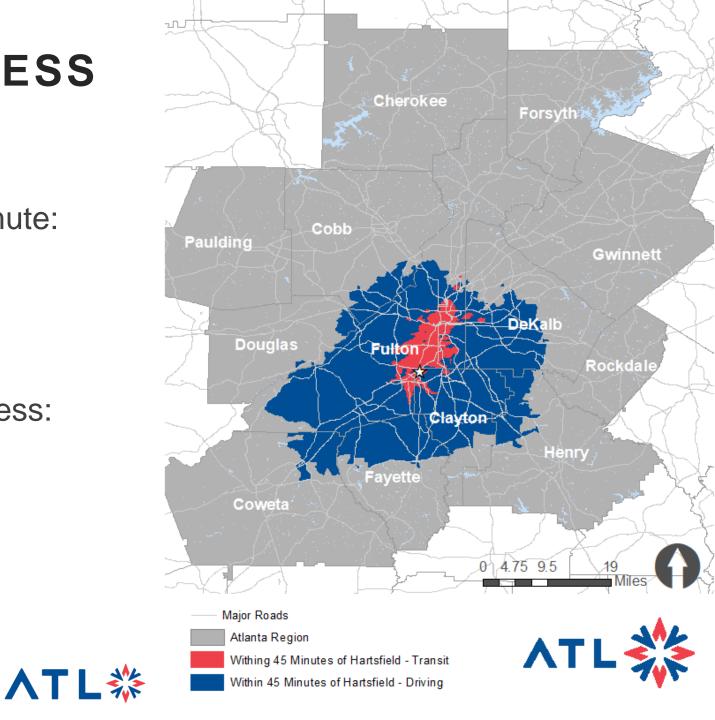


LABOR MARKET ACCESS AIRPORT

Population within a 45-minute commute:

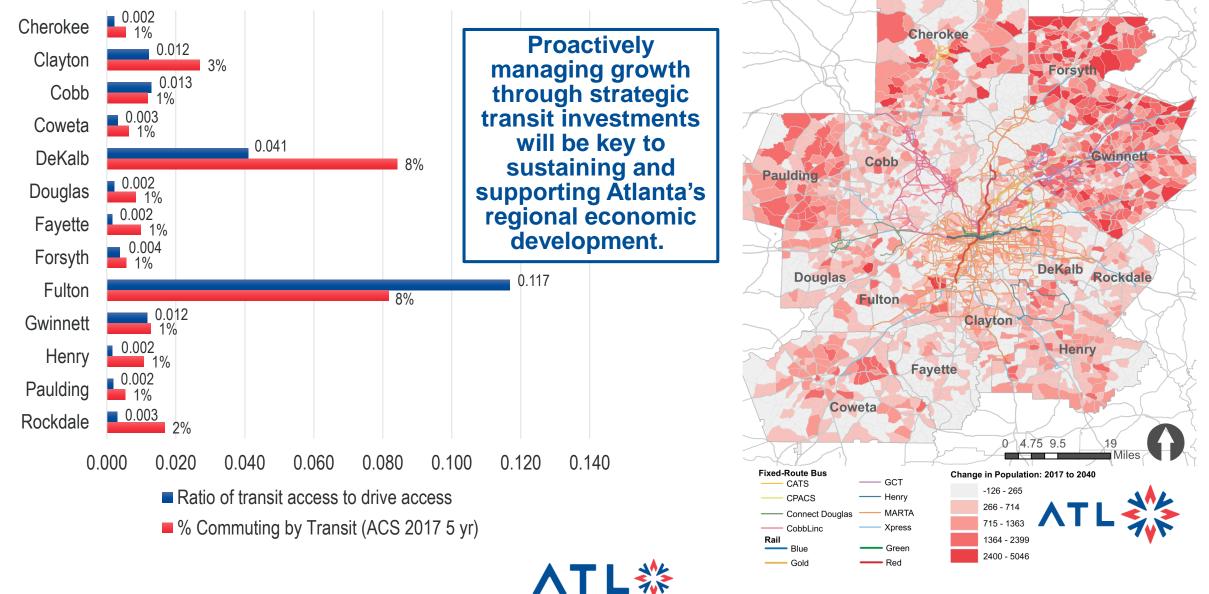
- Driving: 1,235,321
- ► Transit: 213,925

Ratio of Transit Access to Drive Access: 0.17



MODAL PARITY AND TRANSIT MODE SHARE

POPULATION GROWTH AND TRANSIT, 2017-2040

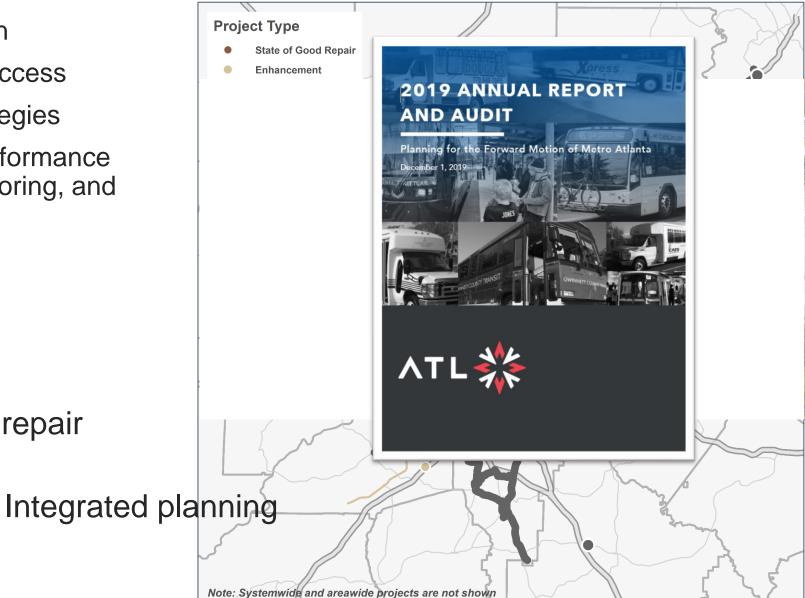


Recommendations and Observations

- Regional Transit Plan
- Peer examples of success
- Key investment strategies
- Improvements to performance measurement, monitoring, and future reports

Dedicated right-of-way

State of good repair



- Peer examples of success
 - Twin Cities
 - Bus-on-shoulder
 - Arterial Bus Rapid Transit
 - Light-Rail
 - Seattle
 - Arterial Bus Rapid Transit
 - Light-Rail
 - Supporting policies (land use, active transportation, TDM)



Areas for strategic investment



Invest in high capacity transit to meet the region's demand



Invest in dedicated right-of-way for transit to improve on-time performance and travel speeds



Ensure the region's transit network works in a coordinated and seamless way



Enhance the state of good repair for the region's transit assets



Integrate land use and transportation planning



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



IMPROVING THE ARA DEVELOPMENT PROCESS

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



IMPROVING THE ARA DEVELOPMENT PROCESS

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



Thank You!



ATL Regional Transit Plan Update

Lori Sand

November 7, 2019

ARTP PROJECT ALIGNMENT TO THE GOVERNING PRINCIPLES

Performance Measure Category	Project-Level Performance Measures	Expansion	Enhancement	SGR
		42	27	15
	Existing, Projected Population Density	6	4	3
Market	Existing Population - Communities of Interest	8	6	6
	Existing Employment Density	5	3	2
	Existing Low Wage Employment Density	7	5	4
	Land Use Mix - Existing, Planned (+/- Community Impacts)	8	4	0
	(Re) Development Potential	8	5	0
Performance		30	50	70
	Transit Trips	10	10	15
	Transit Reliability	15	20	25
	Increased Useful Life	0	10	25
	Elements to Improve Safety/Security/Environment	5	10	5
Deliverability		28	23	15
	Financial Plan	15	10	10
	Documented Project Support	4	4	0
	Project Readiness - Schedule, Environmental Impacts	4	4	0
	Regional Integration / Connectivity	5	5	5
Cost-Effectiveness	Cost per Point	NA	NA	NA



Individual Metrics by Guiding Principle

Equity



- Low Wage Employment Density
- Land Use Mix and Community Impacts
- (Re) Development Potential



Individual Metrics by Guiding Principle





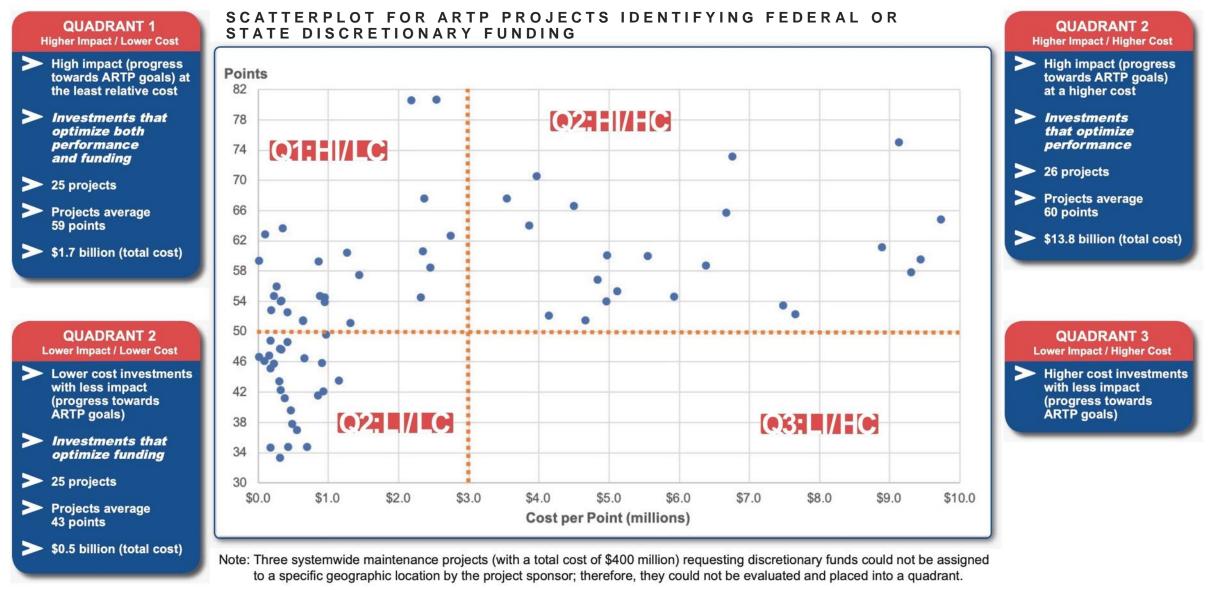
Project Level Alignment to the Governing Principles

Project Name	Deve	Economic lopment and Land Use		ronmental tainability	E	quity	Inno	ovation		ility and ccess	Inve	turn on estment netrics)
BRT Project 1		4		4		3		4		3	\bullet	2
Park and Ride	•	3	•	3	\bigcirc	2	\bullet	2	•	3	\bullet	2
BRT Project 2		4	•	3		4	•	3	•	3		4
SGR	•	3	•	3	\bigcirc	1	\odot	1		4	\bullet	1
BRT Project 3	\bullet	1	•	3	\odot	1		4		2	\odot	1
ART Project 1	\bullet	1	\bullet	1		4	•	3	0	0	\bullet	2
HRT Project 1	\bullet	1	\bullet	1	•	3		4	\bullet	1	\bullet	1
ART Project 2	0	0	\bullet	1		4		4	0	0	•	3

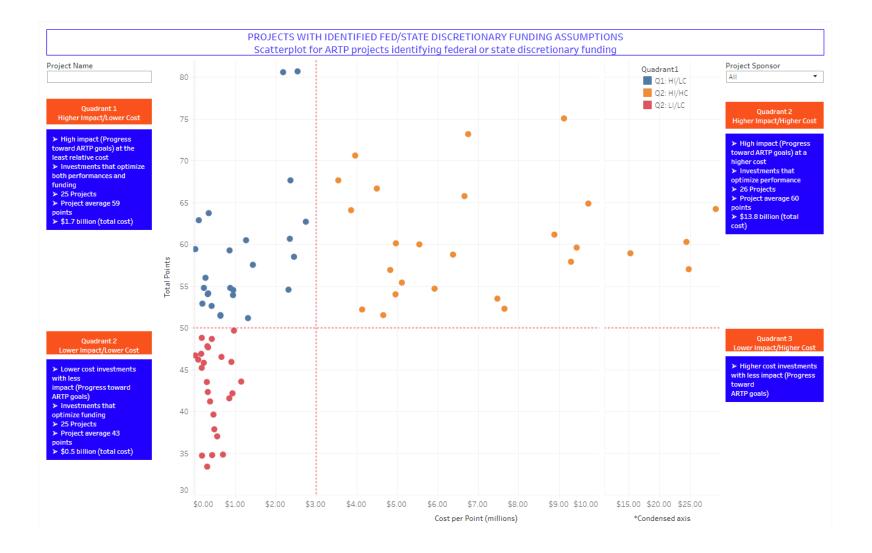


ARTP QUADRANTS

PROJECTS WITH IDENTIFIED FED/STATE DISCRETIONARY FUNDING ASSUMPTIONS



Quadrant Scatterplot Demonstration





2019 ARTP Plan Performance

Tracy Selin, November 7, 2019

2019 ARTP Plan-Level Evaluation

- Evaluate collective impact of 2019 ARTP on transportation system
- Applied to ALL projects proposed for inclusion in the ARTP
- Combination of quantitative and qualitative evaluation:
 - Plan-level metrics that directly align with Governing Principles
 - Summary of the nature and type of investments that advance each Governing Principle
 - Alignment of projects seeking federal or state discretionary funds to their relative impact on each Governing Principle















2019 ARTP Plan-Level Evaluation



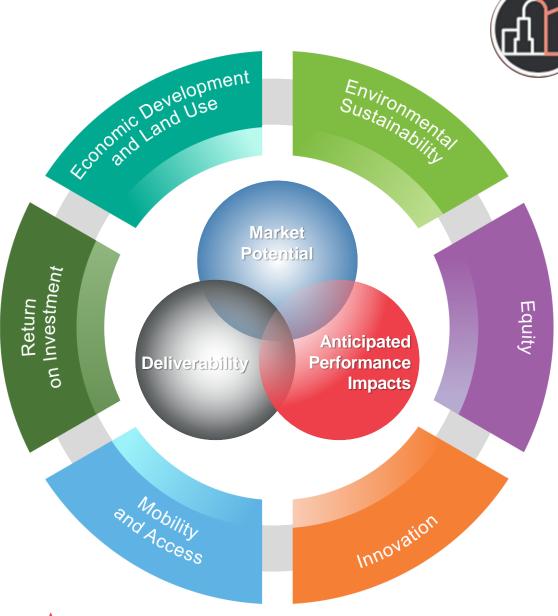
2019 ARTP Plan-Level Evaluation Process and Methods

Direct Impacts (Transit)	Direct Impacts (Highway) Indirect Impacts (All)	Cumulative Impacts
 Primary benefits for transit users Improvements at the trip origin (populations served) Improvements at the trip destination (jobs served) (Re)development jotential GIS-based analysis across all projects 	 Primary benefits for highway users Delay savings Cost savings Evaluated with ARC travel demand model (88 out of 192 projects) 2015 base year 2050 Existing + Committed (E+C) / No Build 2050 Transit Build 	 Secondary, broader public benefits Air pollutant emissions Carbon emissions Crashes Benefit-Cost Assessment (BCA) tool Travel data from ARC model Tailored emission factors, crash rates, fuel rates 	 Aggregated and monetized benefits (direct + indirect) Across 2050 plan horizon Monetized benefits reflect county level wage rates (value of time) Monetized costs reflect capital plus 20 years O&M

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ECONOMIC DEVELOPMENT AND LAND USE

- 100,000 more jobs within walking distance of low-capacity transit
- 420,000 more jobs within walking distance of high-capacity transit
- 4 million vehicle-hours delay saved each year (despite vehicle travel remaining relatively constant between the 2050 Build and 2050 No Build)
- \$652 million in cost savings each year resulting from reduced delay

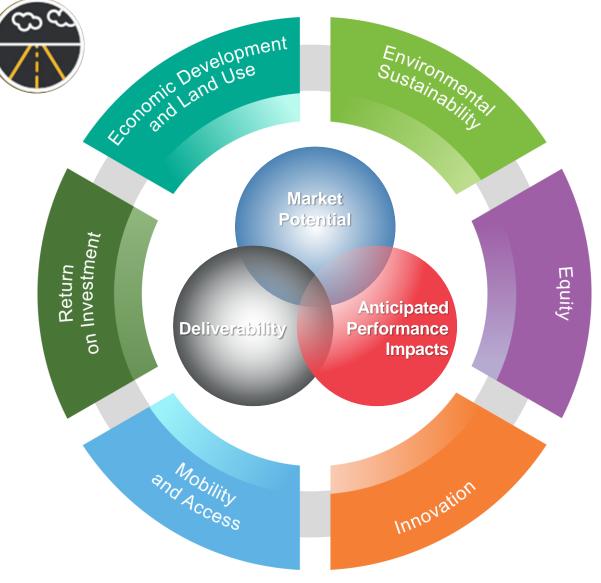


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ENVIRONMENTAL SUSTAINABILITY

- 20% increase in transit ridership (between the 2050 Build and 2050 No Build)
- 24 tons VOC, NOx, PM2.5 reduced each year
- 12 million gallons fuel saved each year
- 10,000 tons carbon emissions reduced each year



EQUITY

- 95,000 more low-income, minority, and zero car households with walk access to lowcapacity transit
- 394,000 more low-income, minority, zero car households with walk access to high capacity transit
- 239,000 more low wage jobs within walk access to high capacity transit
- Targeted investment in areas with significantly lower property values and higher concentrations of low income, minority, and zero car households
 - South Fulton
 - Beltline/West
 - Clayton County
 - Eastern DeKalb County

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INNOVATION

- 104 of 192 projects include components that advance a modern, innovative and more reliable system
 - 62 projects include advanced transit design
 - 96 projects advance transit-friendly technologies
 - 11 projects introduce technology innovation to increase rider safety

2019 ARTP Plan-Level Evaluation

MOBILITY AND ACCESS

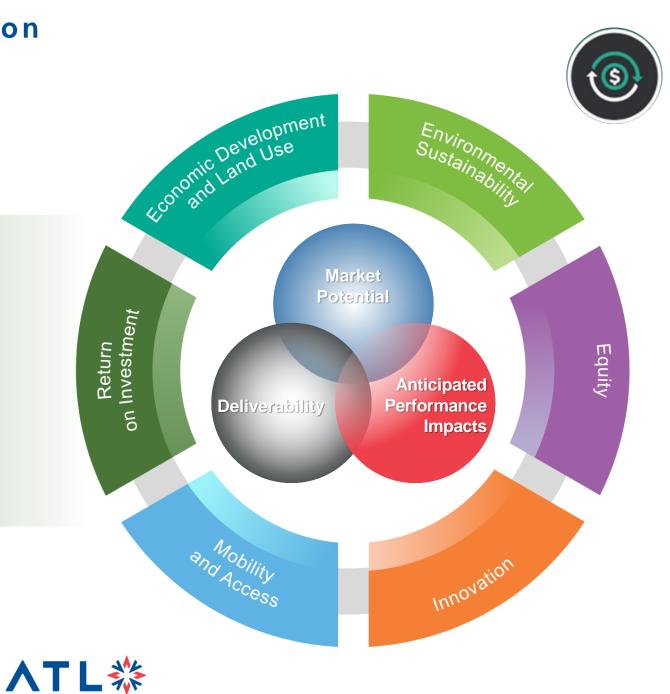
- Year 2050 (Build compared to No Build):
- 3.1% delay reduction for automobiles
- 2.3% delay reduction for trucks
- **By functional class:**
- 0.3% reduction interstates
- 1.0% reduction principal arterials
- 16% reduction minor arterials
- 8% reduction for major collectors
- 5% reduction local roads



2019 ARTP Plan-Level Evaluation

RETURN ON INVESTMENT

- Every \$1 Invested = \$1.25 Return:
- Benefits: reduction in travel time, vehicle operating costs, crashes, emissions, fuel
- Costs: capital and operations



Key Take-Aways

- A more efficient system that can support the same level of travel demand in a rapidly growing urban area, but with less wasted time spent in congestion
- A more equitable system with high-performing investments across the region
- A complimentary investment package to the state Major Mobility Investment Program (MMIP) which targets significant (managed) roadway capacity to the interstate system
- A system that performs with benefits demonstrated across all ATL Governing Principles





ATL Regional Transit Plan: Branding Component

Chris Tomlinson November 7, 2019

THE LAW

AND

GENESIS OF THE ATL LOGO/BRAND

REGIONAL UNIFIED BRANDING - 3 STATUTORY REQUIREMENTS

- 1. HB 930: "On and after January 1, 2019, the (MARTA) board shall utilize a logo and brand upon any newly acquired capital asset worth more than \$250,000 that is regularly visible to the public which shall include the acronym 'ATL' as a prominent feature."
- HB 930: The ATL logo and brand must appear on "any property" of MARTA by Jan. 1, 2023
- 3. HB 930: ATL Regional Transit Plan (ARTP) must "include the creation of a unified brand to encompass all transit service providers within the jurisdiction of the authority."



HB 930

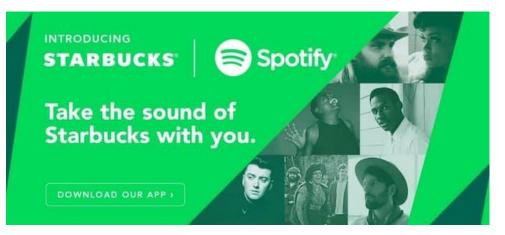


Cobranding vs. Rebranding

Cobranding

Co-branding utilizes two or more brand identities on a good or service as part of a strategic alliance or partnership.

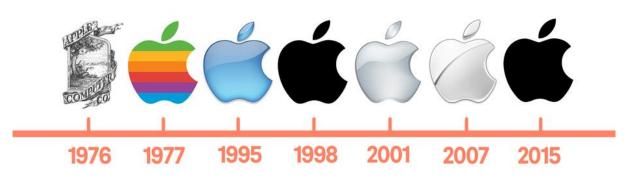
- Brand names, symbols & designs remain the same
- Each brand contributes its own identity to combine their respective market strength, brand awareness, and positive associations.
- Cobranding strategy utilizes established content, graphic designs, and is integrated with existing marketing and advertising campaigns to support the partnership.



Rebranding

Rebranding changes the public-facing image of an entire agency, product or service.

- New name, symbol, or change in design for an already-established brand.
- Creates a different and singular identity for a brand, from its competitors and partners, in the market.
- Requires funding for a creative rebranding strategy, new content, graphic design, as well as marketing and advertising campaigns to support the rebrand.





IMPLEMENTATION TO DATE:

ATL CO-BRANDING WITH MARTA & XPRESS

"CO-BRANDING" ATL: MARTA & XPRESS

- MARTA implemented co-branding on its new buses starting Jan. 1, 2019
- MARTA plans to implement co-branding for other transit assets (Rail, Paratransit, Streetcar, etc.) in Spring 2020

- Xpress began co-branding July 2019
- 88 current coaches cobranded and 77 replacement coaches will have ATL logo upon receipt from the manufacturer
- I of the 11 state-owned Xpress Park & Ride lots has ATL logo; new Park & Rides will have logo upon construction



BRANDING DISCUSSIONS

- ATL held a meeting on February 8, 2019, of marketing and communications leaders of fixed transit operators and partner agencies (MARTA, Xpress, Cobb, Gwinnett, Douglas, ARC and ATL) to discuss:
 - Intent of HB 930's provisions and timeline for any required actions under the law
 - Work associated with adding ATL co-branding to existing fleets, and educating public on its purpose
 - Impact on transit providers' existing brand recognition and reputations
 - Entities and services that are covered under the law
 - Potential customer confusion





BRANDING DISCUSSIONS MOVING FORWARD

- ► ARTP before the ATL Board in December will include language reflecting current co-branding approach
- Regional discussions will continue in 2020, with a focus on tying co-branding rollout to education on, or rollout of, new benefits or regional connectivity
- > ATL to work with transit operators to identify regional features that can be associated with co-branding rollout
- 2020 ARTP update would discuss planned timing of co-branding rollout by other transit providers (beyond MARTA and Xpress)
- ► Value of expanded transit network for the region, as demonstrated by ARTP evaluation, furthers ATL brand
- Goal is to implement the branding requirements of the law, in a way that respects existing branding, yet also moves closer to the vision of a unified regional transit network that is easily navigated and understood



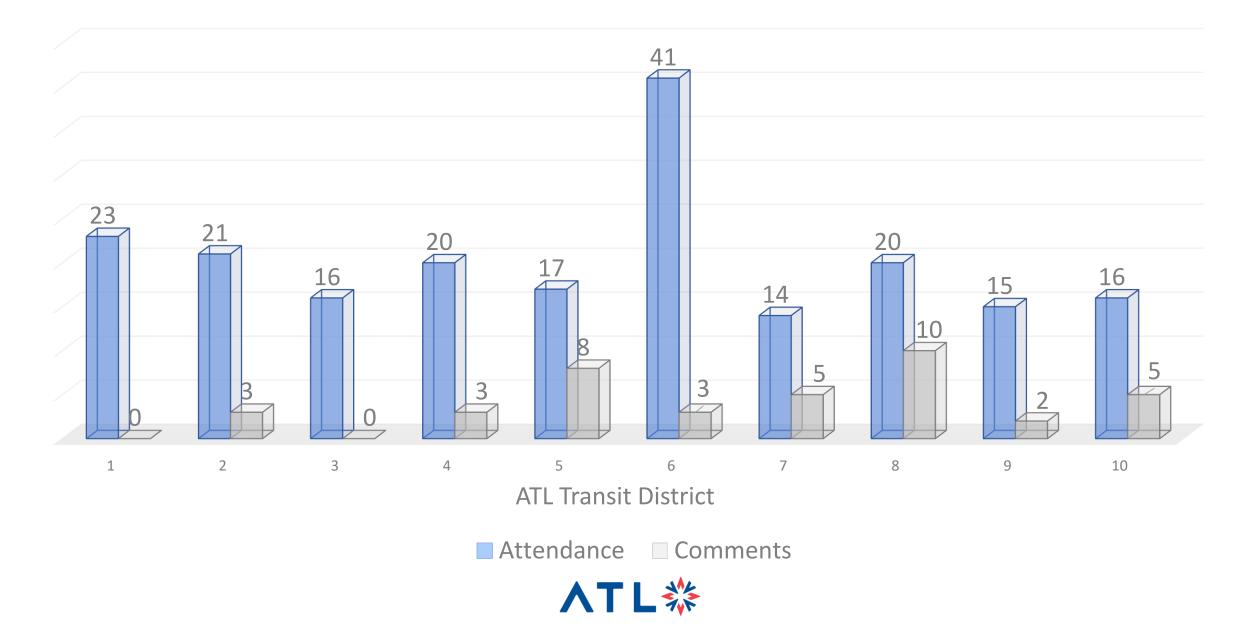
Thank You.





DISTRICT DOWNLOAD STATISTICS

ATTENDANCE (203) AND COMMENTS (39) BY DISTRICT



ATL DISTRICT DOWNLOAD COMMENTS

"I am glad to see there are active plans for expansion and moving to mass transportation"

"Great information to build our community."

"Great display boards. Having people answer questions at each board was helpful."

"I would prioritize a common payment platform so that all various operators could offer a seamless payment experience."

"Questions were answered. Hopefully can get more citizens involved. Some how advertise on the TV." *"Great way to bring transit communities together with uniform assessment criteria."*



ATL DISTRICT DOWNLOADS: KEY STAKEHOLDERS ATTENDING

District	Name	Affiliation
1 – Alpharetta	Chris Speed	Field Representative, Congresswoman Lucy McBath's Office
1 – Alpharetta	John Hipes	Member, Alpharetta City Council
2 – Cumming	Cindy Jones Mills	Member, Forsyth County Board of Commissioners
2 – Cumming	Dennis Brown	Member, Forsyth County Board of Commissioners
2 – Cumming	Eric Christ	Member, Peachtree Corners City Council
3 – Sandy Springs	Rusty Paul	Mayor, Sandy Springs
3 – Sandy Springs	Terry Nall	Member, Dunwoody City Council
3 – Sandy Springs	Jim Riticher	Member, Dunwoody City Council
3 – Sandy Springs	Antrell Tyson	District Director, Congresswoman Lucy McBath's Office
3 – Sandy Springs	Al Pond	Member, MARTA Board
4 – Marietta	Mike Boyce	Chairman, Cobb County Board of Commissioners
4 – Marietta	Michael Paris	Executive Director, Council for Quality Growth
4 – Marietta	Slade Gulledge	Director of Government Affairs, Cobb Chamber of Commerce
5 – Atlanta	Patti Garrett	Mayor, Decatur
6 – Lawrenceville	Randy Meacham	Executive Director, Gwinnett Municipal Association



ATL DISTRICT DOWNLOADS: KEY STAKEHOLDERS ATTENDING

District	Name	Affiliation
6 – Lawrenceville	Kelly Kelkenberg	Member, Duluth City Council
6 – Lawrenceville	Matthew Lee	Executive Director, Tucker-Northlake CID
6 – Lawrenceville	Joe Allen	Executive Director, Gwinnett Place CID
7 – Lithonia	Delores Crowell	Director of Intergovernmental Affairs, DeKalb County
8 – Douglasville	Dr. Romona Jackson Jones	Chair, Douglas County Board of Commissioners
8 – Douglasville	Kelly Robinson	Vice Chair, Douglas County Board of Commissioners
8 – Douglasville	Tarenia Carthan	Member, Douglas County Board of Commissioners
8 – Douglasville	Ann Jones Guider	Member, Douglas County Board of Commissioners
9 – Stockbridge	Becky Evans	Member, Georgia House of Representatives
9 – Stockbridge	El-Mahdi Holly	Member, Georgia House of Representatives
9 – Stockbridge	Anthony Ford	Mayor, Stockbridge
9 – Stockbridge	Neat Robinson	Member, Stockbridge City Council
10 – Jonesboro	Rhonda Burnough	Member, Georgia House of Representatives
10 – Jonesboro	Dr. Tim Hynes	President, Clayton State University
10 – Jonesboro	Jerry Griffin	Member, MARTA Board

