Preliminary Findings 2008 Public Transportation Rural Provider Survey

This Report

This report provides a snapshot of the status of Oregon's Public Transportation Provider infrastructure and short term provider needs to sustain and improve Oregon's public transportation system. Emphasis is on the capital needs of rural transit providers as data about Oregon's rural transit system is not readily available.

A survey of providers was conducted in partnership with Oregon Transit Association to obtain current information about Oregon's fleet needs and the status of rural provider facility needs.

Method

August 2008 Public Transit Division (PTD) conducted a survey of 82 public transit providers of urban, rural and special needs transportation services in Oregon. The electronic survey was distributed to public transit providers participating in PTD programs with active services open to the general public as well as those providing trips for seniors and individuals with disabilities. Of the 82 providers contacted, 63 responded to the survey.

This survey does not reflect all system costs or a complete capital inventory. The report is intended as a planning tool to provide a snapshot of information about the capital needs of a majority of providers, and a look at the near future impact of changes or trends on transit service and costs. The information should be used with that in mind.

Undercount. Because not all providers responded, there is some undercount of vehicle and facilities needs and costs.

Major Findings for the Five Year Period:

Vehicles Need– the gap between what providers have budgeted with "likely" available funds and what is actually needed to keep the public transit fleet within federal replacement standards.

- **Rural** providers estimate a gap of $25.5 million in funds to replace 356 vehicles, $19 million to expand 180 vehicles to meet demand. **(about $9 million/year)**
- **Urban** providers estimate a gap of $70 million to replace 462 vehicles, $9.9 million to expand 80 vehicles to meet demand. **(about $16 million/year)**
- Estimates of cost do not include the additional cost per vehicle if the latest in "green" technology is purchased. They are the average cost of replacement with standard contemporary equipment. Purchasing "green" technology could raise these estimates as much as 25% or more.
- Estimates do not include inflation factors.

The following table is a summary of provider responses about their expected vehicle needs and the likelihood of funds for replacements based on past experience in getting state, federal and local resources.

Oregon Public Transportation Fleet Five Year Summary and Vehicle Replacement Needs						
Present Fleet of vehicles is 1,918, Original Cost at $278,084,000	**Total Vehicles**	**Estimated Replacement Cost**	**Urban Vehicles**	**Urban Estimated Replacement Cost**	**Rural Veh.**	**Estimated Replacement Cost**
Need to be replaced (2009-11)	708	$97,809,000	443	$80,805,500	265	$17,003,500
Need to be replaced (2011-13)	391	$49,363,500	255	$34,815,500	163	$14,548,000
Providers can replace under current conditions	308	$51,330,000	236	$45,329,000	72	$6,001,000
Gap for Replacement	**791**	**$95,842,500**	**462**	**$70,292,000**	**356**	**$25,550,500**
Need to be purchased for expansion (2009-11)	191	$22,839,500	71	$8,992,500	120	$13,847,000
Need to be purchased for expansion (2011-13)	159	$15,954,500	66	$7,121,500	93	$8,833,000
Providers can expand under current conditions	90	$9,620,000	57	$6,194,000	33	$3,426,000
Gap for Expansion	**260**	**$29,174,000**	**80**	**$9,920,000**	**180**	**$19,254,000**
% able to replace of need	28.03%		33.81%		16.82%	
% able to expand of need	34.62%		41.61%		14.93%	

Facilities – Five Years Needs Findings

- **Rural** providers estimate a cost of $45 million to improve facilities. About **$9 million per year.**
  - Need for phone and communication systems.
  - Need for computer modernization.
  - Need for maintenance, shops, and secured parking.

- **Urban** providers estimate a capital cost of $85.2 million. About **$17 million per year.**
  - Need for computer modernization.
  - Additional **$150 million** for three big urban projects.
    - $40 million radio system for TriMet. FCC mandated because current system violates emergency/security communications
    - $40 million TriMet must replace 27 year old farebox system with modern electronic system
    - LTD will complete Parkway and Pioneer Plaza BRT lines.

The following chart identifies facility improvements needed for Oregon's transit providers. In most cases funding for even a small capital project is uncertain and funding for large projects is very difficult. Providers did not identify expected project funding. The funding climate is too uncertain.

Oregon Public Transportation Five Year Summary Facilities, Shelters and Equipment Needs

	All Providers	Urban	Rural
Passenger shelters Quantity	1,376	1,188	208
Passenger shelters $	4,371,000	3,817,000	644,000
Transfer stations Quantity	67	55	12
Transfer stations $	10,503,000	6,403,000	4,100,000
Admin Building Quantity	14	3	11
Admin Building $	19,335,000	4,750,000	14,585,000
Maintenance Buildings/Shops/Secured Parking total quantity	38	10	29
Maintenance Buildings/Shops/Secured Parking costs ($)	63,868,000	41,786,000	22,368,000
Phone/Communication system total quantity	69	6	63
Phone/Communication system costs ($)	2,477,700	1,774,500	703,200
Computer with standard software total quantity	529	405	196
Computer with standard software costs ($)	22,964,454	22,610,000	390,454
Scheduling software total quantity	35	3	32
Scheduling software costs ($)	6,117,750	4,075,000	2,042,750
Subtotal	**$135,754,654**	**$89,290,500**	**$46,876,154**
Other quantity	34	21	13
*Other costs ($)	97,971,411	97,650,000	321,411
Other quantity	4	2	2
*Other costs ($)	54,656,000	54,655,800	200
TOTAL FACILITY COST	**$282,264,315**	**$237,521,300**	**$45,155,015**
*Other costs ($) reflects several large projects for LTD and TriMet			
TriMet has FCC mandated $40 million project to replace radio system by 2013. TriMet also must replace 27 year old fareboxes system with contemporary system.			
LTD will build out the Parkway and Pioneer Plaza Emx Bus Rapid Transit Service.			

Operating Cost and Service trend Impacts

- Fuel costs grew 5 times greater than CPI for rural providers and 8 times greater for urban
- Operations costs grew about 3 times greater than CPI for both urban and rural providers.
- Urban providers experienced 11 % growth in cost of required ADA services.
- Both urban and rural providers anticipate at least **a 9 % percent increase in trip demand starting 2010**.
- Rural providers expect to experience substantial increases in trip demand each year.
- Urban providers face having to curtail services due to budget constraint.

Rural Oregon Public Transit Providers Current and Projected Demand

Rural Trips	**2007**	**2008**	**2009**	**2010**	**2011**
Fixed route transit	1,057,663.0	1,172,957.0	1,272,984.0	1,465,447.0	1,587,510.0
Demand Response transit	1,211,317	1,236,657	1,267,320	1,380,406	1,465,374
commuter bus	141,764	231,703	201,125	234,698	242,450
Intercity	7,518	7,619	14,250	14,900	15,550
Total Rural trips	2,418,262.0	2,648,936.0	2,755,679.0	3,095,451.0	3,310,884.0
% annual growth in trips		9.54%	4.03%	12.33%	6.96%
% growth over 5 years					36.9%

2008 Increase in Cost for Oregon's Transit Providers Compared to Consumer Price Index