

Transit Trends in the WILMAPCO Region

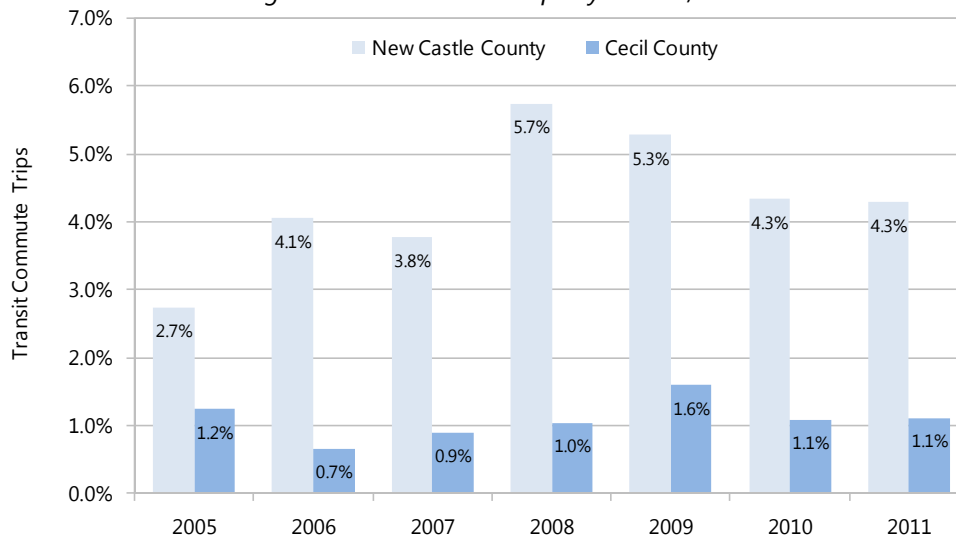
Overview

At the national level, overall travel growth has slowed and changes have occurred in transit use and mode share. Transit has grown in terms of total trips and its overall mode share has stabilized. Data shows that nationally transit trips declined in the early 1990's followed by ridership growth through 2001, and then again in 2004.

This data report presents changes in transit ridership levels and trends, based on information that is measured and reported in the WILMAPCO region. There are a number of indicators that reflect the quality and quantity of service in a regional transit system. This report update summarizes some key indicators of transit level of efficiency such as productivity, vehicle usage, ridership, and financial trends.

Transit Mode Share

Figure 1: Annual Work Trips by Transit, 2005-2011

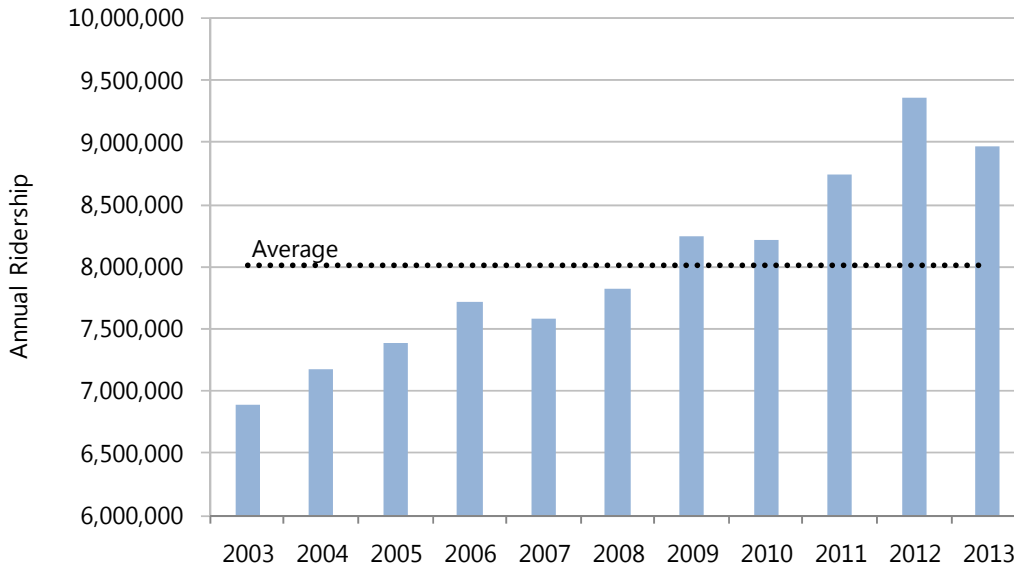


- While driving alone to work has remained the top mode of travel for commuters in the WILMAPCO region, transit mode share has grown. From 2005 (6,906) to 2008 (15,009) New Castle County transit commutes increased significantly by 117%, shown in Figure 1. Then, from its peak in 2008 (15,009) to 2011 (10,969) New Castle County transit commutes decreased by 27%.
- Between 2008 (530) and 2011 (545) Cecil County transit commutes increased by 2.8%, but remained fairly stable in terms of percentage since 2005.
- Overall from 2005 to 2011, transit commutes in the WILMAPCO region increased by 54%. Yet, over a three-year span from 2008 to 2011, work trips by transit decreased by 26% in the region.
- Not shown in the figure, however, is the fact that transit mode share has seen slow gains since 1990 and earlier.

New Castle County Bus Ridership

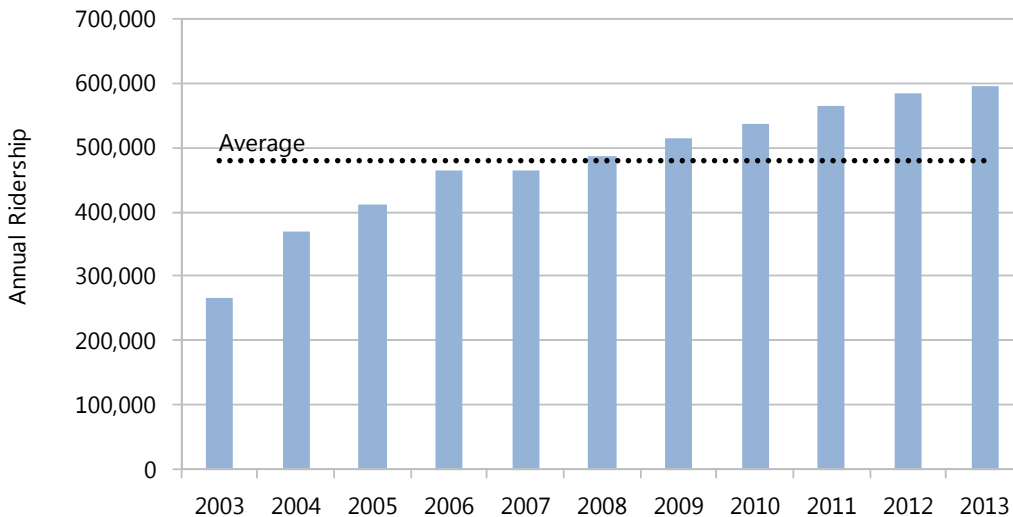
Delaware Transit Corporation (DTC) is the public transit provider for Delaware, known as DART. DART’s current fixed route bus ridership for the three-county state exceeds 10 million. In New Castle County, residents and visitors are served by 44 fixed route buses. Over the 10-year period, shown in Figure 2, fixed route ridership has steadily increased by 30%, with an annual percentage growth rate of 3%. Since FY 2003 the highest annual ridership for New Castle County’s fixed route service was in 2012 with over 9.3 million riders. Between 2008 and 2013 the fixed route service witnessed a ridership increase of roughly 15%.

Figure 2: Annual Fixed Route Ridership, FY 2003-2013



To meet federal mandates under the Americans with Disabilities Act (ADA), DART provides demand response bus service, or Paratransit, in areas surrounding three-quarter miles of any fixed route service during the hours and days of a given route. Similar to the fixed route service, Paratransit ridership has increased steadily since FY 2003. Over the past ten-years, Paratransit in New Castle County witnessed a 122% increase in riders. Paratransit’s straight-line rate of growth outpaces fixed buses with an average increase of 12% each fiscal year.

Figure 3: Annual Paratransit Ridership, FY 2003-2013

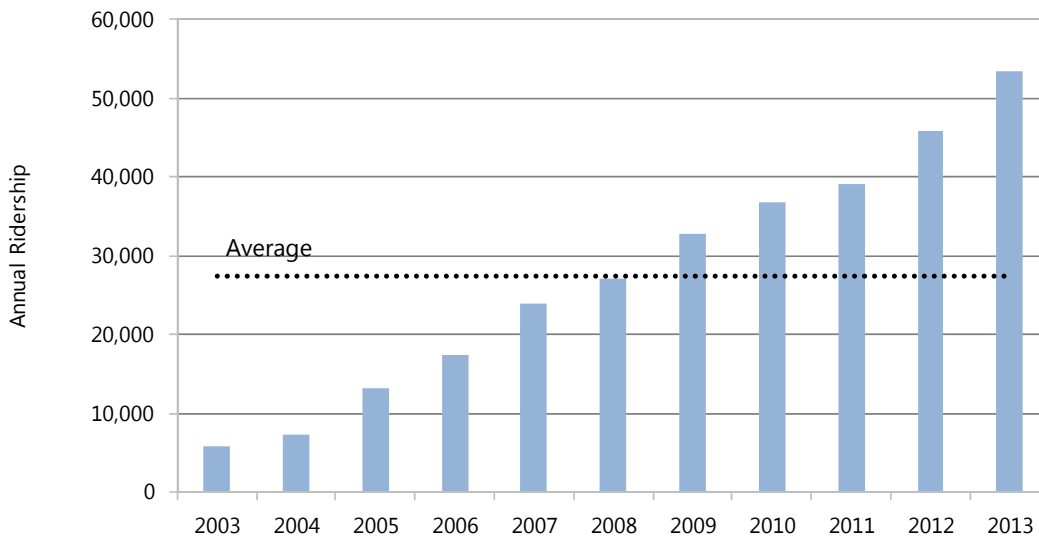


Source: DTC

Cecil County Bus Ridership

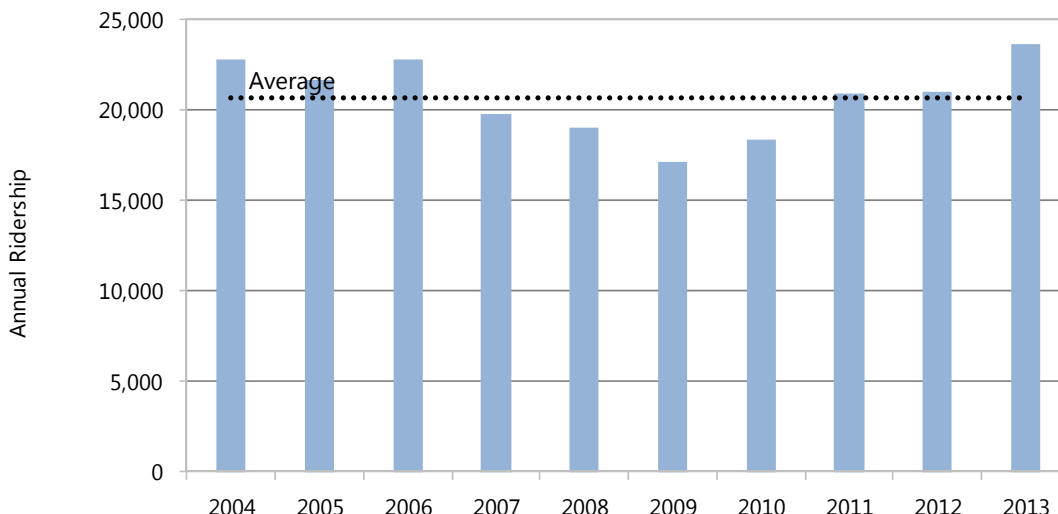
Cecil County Senior Services and Community Transit is the provider of bus services in the County. Cecil County residents are served by buses that travel along two main fixed routes, mostly concentrated within the US 40 corridor connecting Perryville to Elkton and key destinations in between. In a ten-year period, ridership has sky rocketed (more than 800%) from roughly 5,700 in FY 2003 to more than 53,000 riders in FY 2013. Strong annual ridership gains were also witnessed in the past few years between 2011 and 2012 (17%) and from 2012 to 2013 (16%). Most of this growth is the result of incremental expansion of bus service via additional service hours and a second bus route added in 2010.

Figure 4: Annual Fixed Route Ridership, FY 2003-2013



Cecil County’s Demand Response Transit (DRT) provides countywide curb-to-curb service to riders of all ages and physical ability by reservation only. While ridership on Cecil County’s fixed service has grown, the demand response service has remained fairly stable over the years. From FY 2004 to FY 2013, demand response grew by 3.6%. After reaching its lowest point in FY 2009, ridership recovered by 38% through FY 2013. However, since FY 2007 fixed route bus service has persistently outpaced DRT ridership in Cecil County.

Figure 5: Annual Demand Response Transit Ridership, FY 2004-2013



Source: Cecil County Senior Services and Community Transit

New Castle County Sunday Service

- In June of 2008 DTC began a pilot Sunday bus service for seven routes in and around the City of Wilmington, which mostly operate every hour. This addition of Sunday service is a notable improvement for the transit level of service.
- A year later, in June of 2009 DTC added an additional route to provide Sunday trips between Wilmington to Newark.
- Sunday bus routes cover a significant portion of DTC's core bus service area in northern New Castle County.
- Since FY 2009, Sunday routes increased ridership by 42%. Ridership peaked in FY 2013 with more than 170,000 riders along eight routes.
- Sunday service represented less than 2% of total bus ridership in New Castle during FY 2013.

Figure 6: Sunday Bus Routes

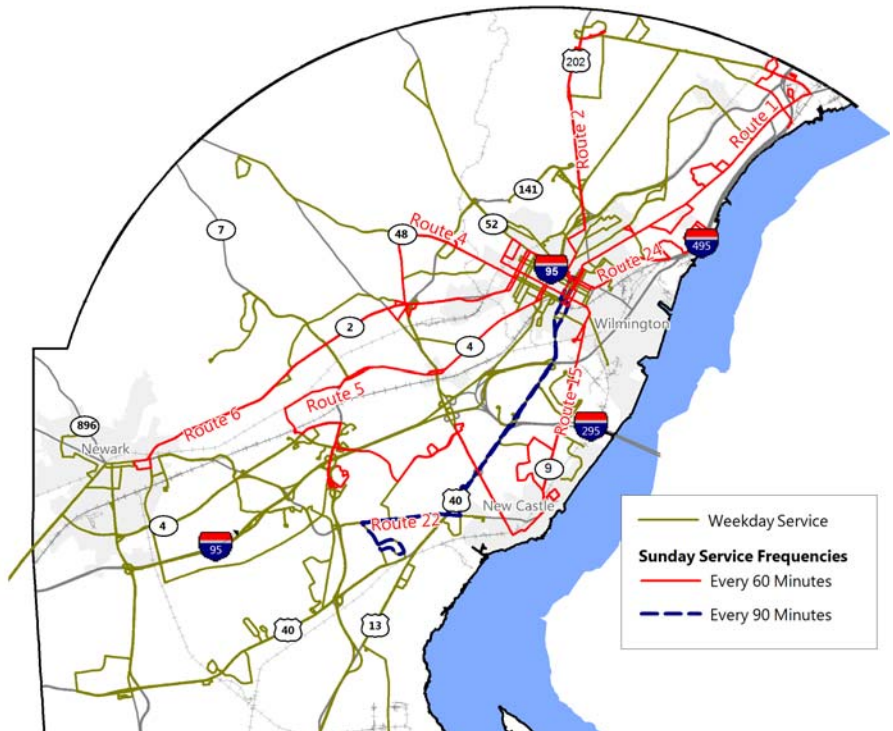
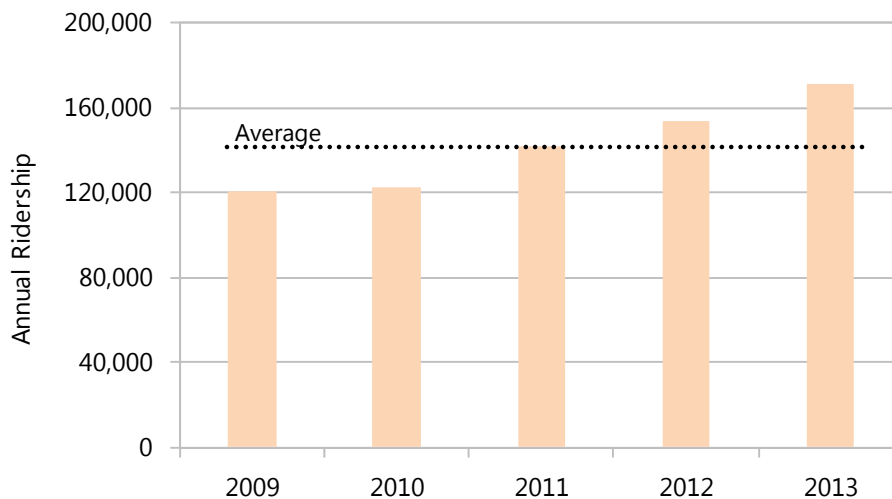


Figure 7: Annual Sunday Service Ridership, FY 2009-FY2013



New Castle County Route Performance

- Based on a five-year average¹ between FY 2007 and FY 2011, over a dozen bus routes in New Castle County boarded at least 20 passengers per hour.
- The top five routes are shown in Figure 8. Several of these routes (1, 4, 22) also provide Sunday service.
- The Route 4, which travels along West 4th Street and Lancaster Avenue in Wilmington, had the highest number of riders per operating hours.
- In addition to strong hourly performance, the overall ridership of the Route 41 increased by close to 70% since FY 2007.
- Routes with the lowest ridership per hour operate a significantly lower number of trips per day compared to other routes in the county. Yet, these routes provide key connections throughout the region.
- The Route 59 is the mid-day bus connection between Newark and Wilmington Train Stations, when train service is unavailable. Its average boarding is likely reflective of the routes' non-peak hours of operation.
- Of the five routes with lowest riders per hour, the Route 61 is the only bus that witnessed a gain (33%) in annual ridership over the five-year period.
- Routes 62 and 63 shuttles serve large employment centers and educational institutions, but are limited to the Churchmans area.
- Since its service reduction in 2005, even fewer riders board the Route 65 which connects the Newark Train Station and Transit Hub and Elkton, MD.

Figure 8: Highest Performing Bus Routes, FY 2007-2011

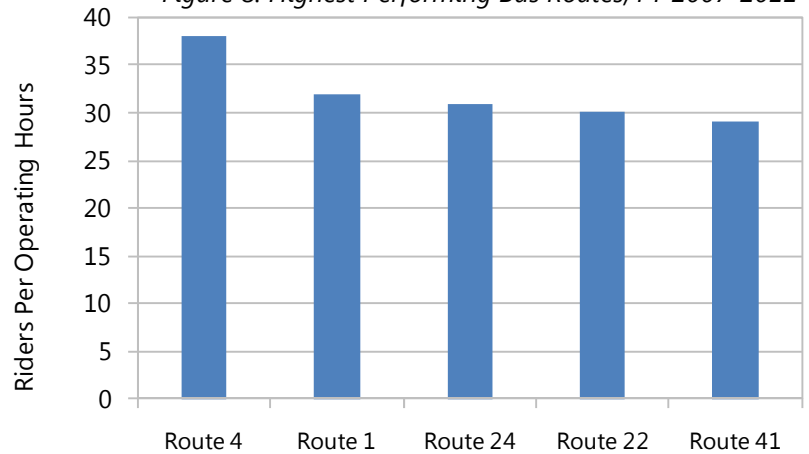


Figure 9: Lowest Performing Bus Routes, FY 2007-2011

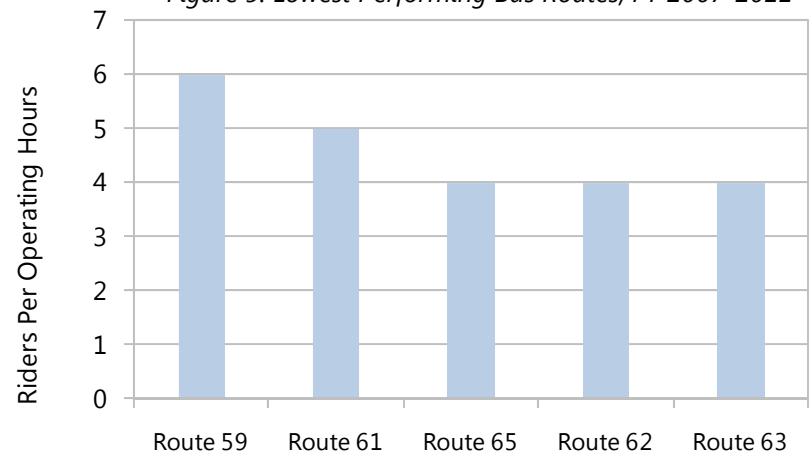
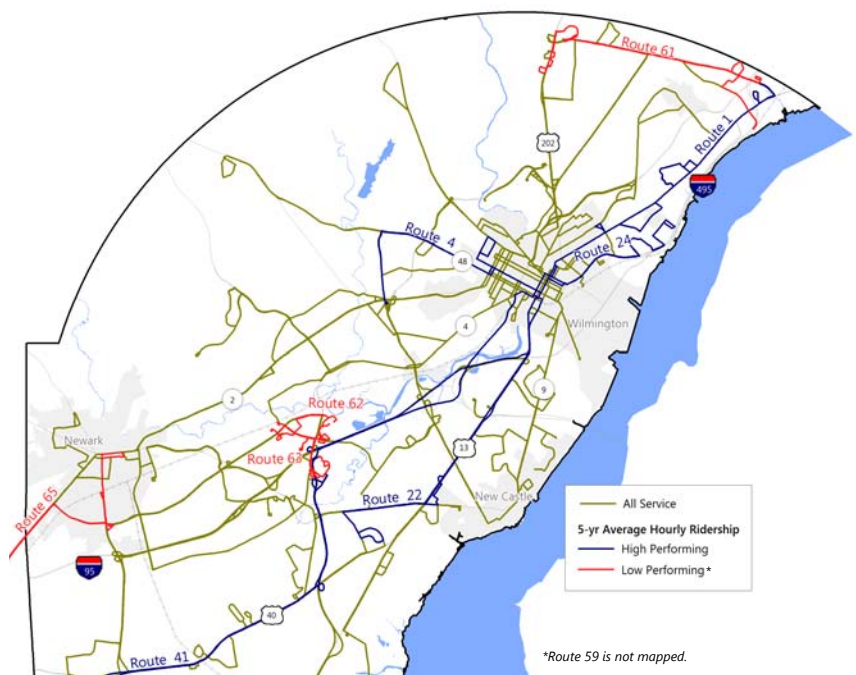


Figure 10: Ridership Per Hour, FY 2007-2011



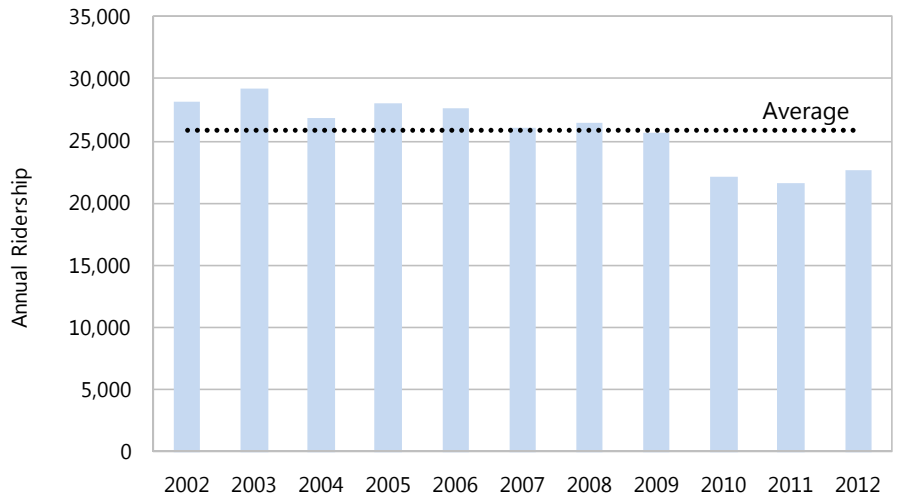
Source: DTC

¹Only routes in service over the five year period are included.

UNICITY Bus Service

- The UNICITY Bus is a service of the City of Newark and the University of Delaware, with funding assistance from the State of Delaware.
- Operating within a limited service area, riders increased by roughly 1,000 passengers or 4.8% between FY 2011 and FY 2012.
- Despite an increase over the past year, annual ridership figures decreased by 19.6% since FY 2002. Ridership also dropped by 14% between FY 2008 and FY 2012.

Figure 11: UNICITY Ridership, FY 2002-2012



New Castle County Trolley Service

- In the late 1990's a study was conducted that affirmed a replica of a historic trolley would create economic and mobility benefits for Wilmington residents and businesses. In 2002, a new trolley replaced the buses assigned to the downtown Wilmington circuit Route 32 to connect Rodney Square with the Riverfront.
- In 2008, the route's ridership exceeded 198,000 riders and has since dropped to roughly 100,000 riders in each year following.
- Due to high volume, the Riverfront is also serviced by the Route 12, which is a likely cause for the Route 32's drop in ridership.
- In 2007, the Route 31 Newark Trolley was added to circulate along Main Street and serve the Newark Transit Hub.
- In 2009, the Route 31 peaked with more than 12,000 riders.
- Despite ridership gains, the service was discontinued in 2012 due to persistent low usage.

Figure 12: Route 32, Wilmington Trolley Ridership, FY 2008-2012

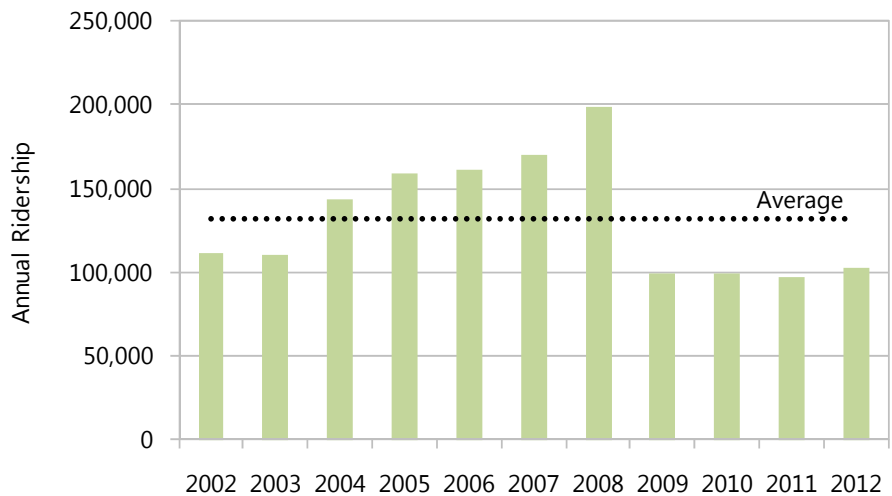
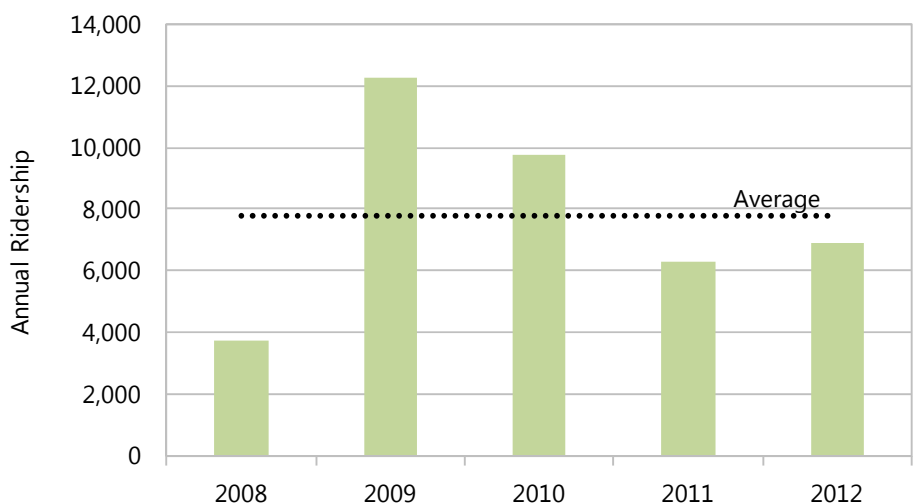


Figure 13: Route 31, Newark Trolley Ridership, FY 2008-2012



Sources: DTC, City of Newark

Inter-County Transit Service

There is an ever growing cross-border commuting trend in the WILMAPCO region; the number of workers commuting into and outside of the region has grown since 2000. Inter-county transit service provides key connections for residents to reach employment in adjacent counties, and vice versa.

- In FY 2005, the Route 65, between Newark, DE and Elkton, MD, peaked with more than 22,000 riders, and then subsequently declined due to reductions in service. Between FY 2005 and to FY 2010, ridership dramatically decreased by 59%. Since its lowest ridership in FY 2010, annual ridership has begun to increase again, with a gain of 34% between 2010 and 2012.
- From FY 2005 to FY 2012, the Route 301, which travels between Wilmington, Middletown, and Dover, grew by 71%. Its ridership peaked in FY 2012 with more than 200,000 riders. The Route 45 was implemented between Odessa and Wilmington to alleviate overcrowding on the Route 301 due to peak ridership.

Figure 14: Bus Route 65 Annual Ridership, FY 2002-2012

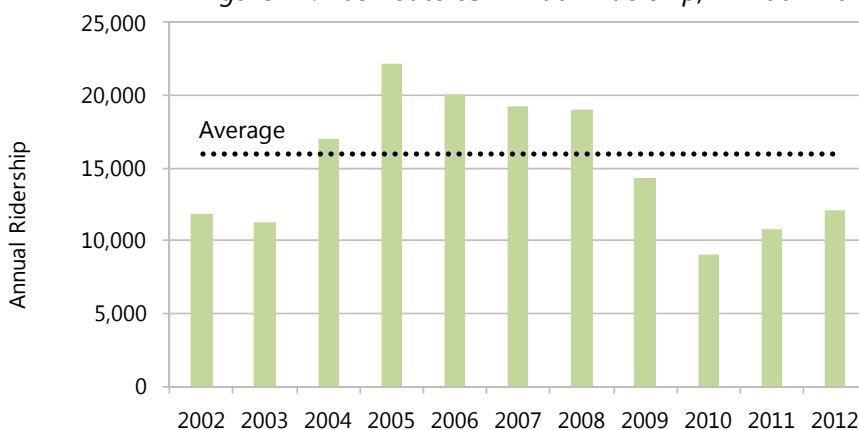
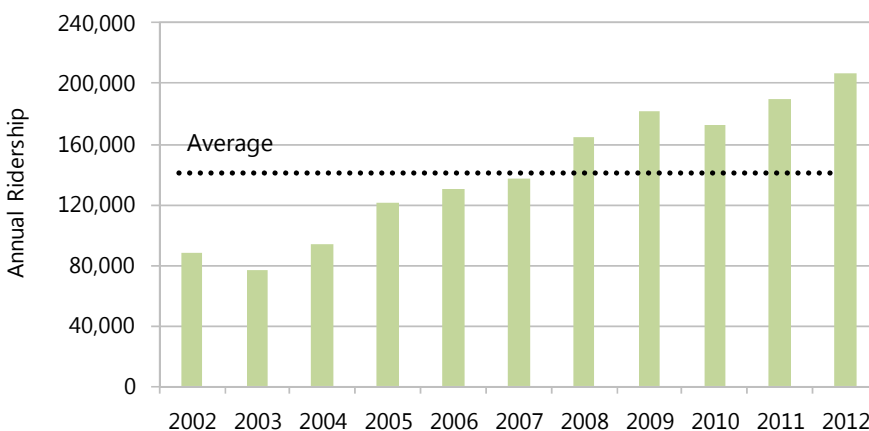


Figure 15: Intercounty Route 301 Annual Ridership, FY 2002-2012



- The WILMAPCO region is also served by other inter-county transit routes such as “The Bus” from Elkton to People’s Plaza in Glasgow, DE, and the New Jersey Transit Route 423 from Penn’s Grove², NJ into Rodney Square in Wilmington, DE.
- SEPTA’s Route 113 began service to New Castle County in 2009, and currently has one stop in Delaware at the Tri-State Mall. In 2012, the Route 113 had an average daily weekday ridership of 6,850 passengers.

Sources: DTC, SEPTA

²Ridership not available for the NJ Transit Route 423.

AMTRAK in Delaware

- The WILMAPCO region is served by short- and long-distance trains via Amtrak. Over a decade, arrivals and departures in Delaware rose by more than 39,000 riders, or 5.5%.
- While ridership at the Wilmington Station has grown by 30,000 riders, it witnessed less than 5% in decadal growth. During the same time period, Newark rider-ship steadily climbed from 4,000 to roughly 13,000 annually, or 200%.
- Since its notable 9% decline in FY 2009, overall Wilmington station usage rebounded by FY 2013 by 11%.

Commuter Rail Service

- DTC contracts with SEPTA to provide commuter service between Newark and Philadelphia. Since FY 2002, ridership increased during weekdays and Saturdays by just over 61%.
- Over ten years, the annual percentage growth rate for ridership is 6.2%. This figure was exceeded between FY 2005 and FY 2006 with 16% growth.
- The Maryland Transit Administration (MTA) contracts with AMTRAK to provide the Maryland Area Regional Commuter (MARC) service.
- Over a ten year period, MARC ridership at the Perryville Train Station has more than doubled, with an increase of 105%.
- However, within the past five years, annual ridership growth has averaged 1.5% annually.

Figure 16: AMTRAK Ridership in Delaware, FY 2003-2013

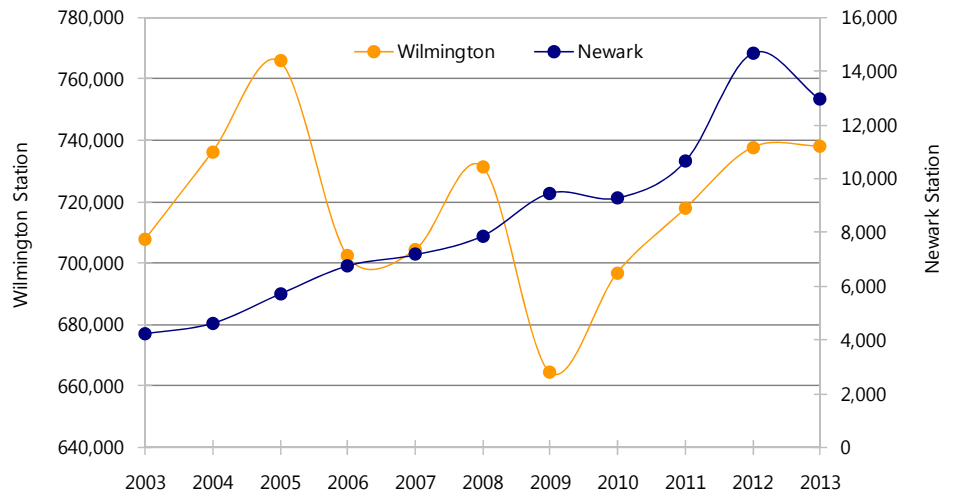


Figure 17: SEPTA Newark/Wilmington Ridership, FY 2002-2012

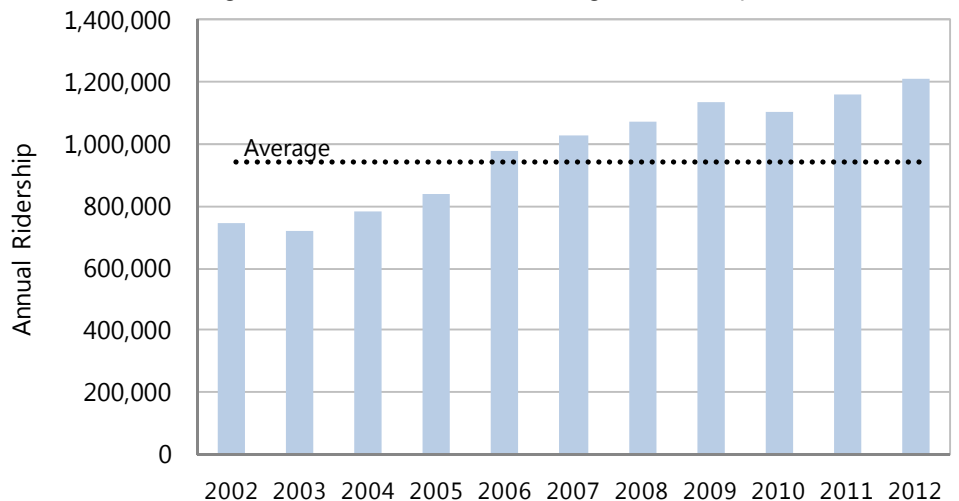
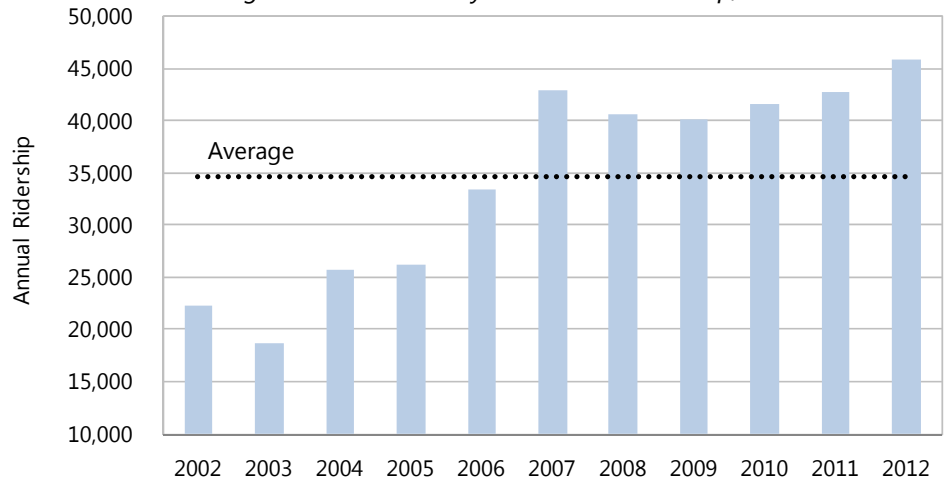


Figure 18: MARC Perryville Station Ridership, FY 2002-2012

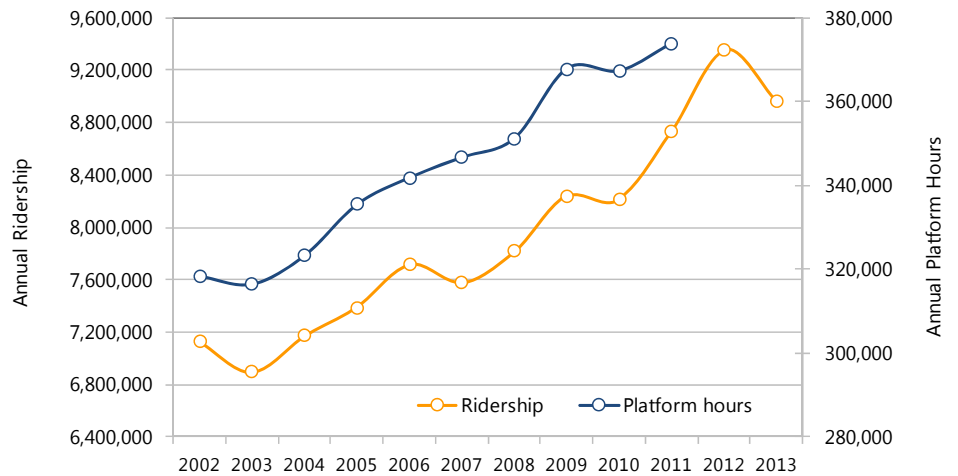


Sources: AMTRAK Station Fact Sheets; DTC; MTA

Ridership and Platform Hours

- Platform hours, which measures the efficiency of a route or system, are those hours that are spent from the time the bus leaves its depot until it returns after its final trip.
- Platform hours have steadily increased between FY 2002 and FY 2011 by 17%. Both riders and hours dropped less than one percent in FY 2010.
- Generally the platform hours have kept pace with New Castle County's growing bus usage.

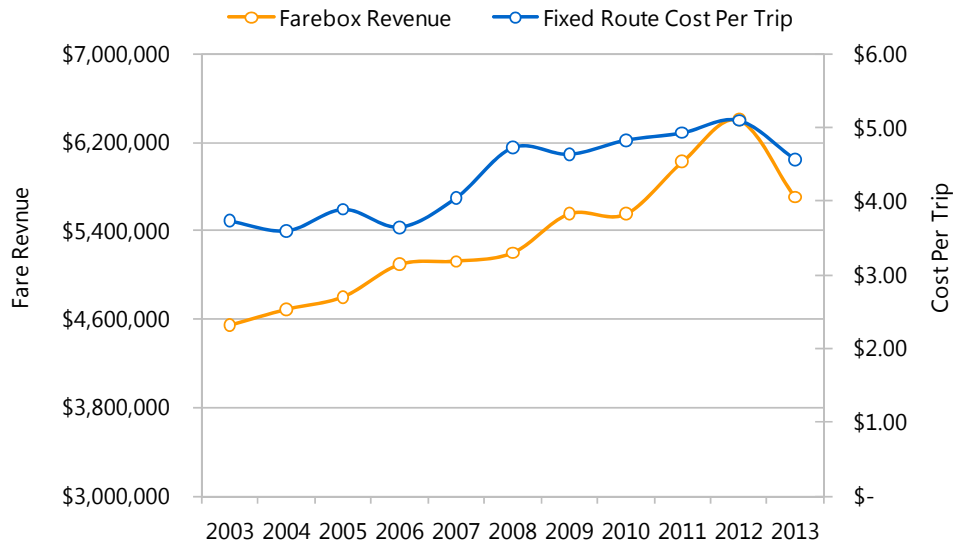
Figure 19: New Castle County Ridership and Platform Hours, FY 2002-2013³



Fare Revenue and Trip Cost

- The actual cost of fixed route service per mile increased by 22% since FY 2003. However fares for DART fixed route buses have not increased in over 20 years from \$1.15 per one-way trip. Presently, the one-way fares have increased to \$1.50. Fares are slated to increase incrementally in future years.
- Since FY 2003, fare box revenues increased by more than \$1.1 million, or 25%.

Figure 20: Fare Revenue and Ridership in New Castle County, FY 2003-2013



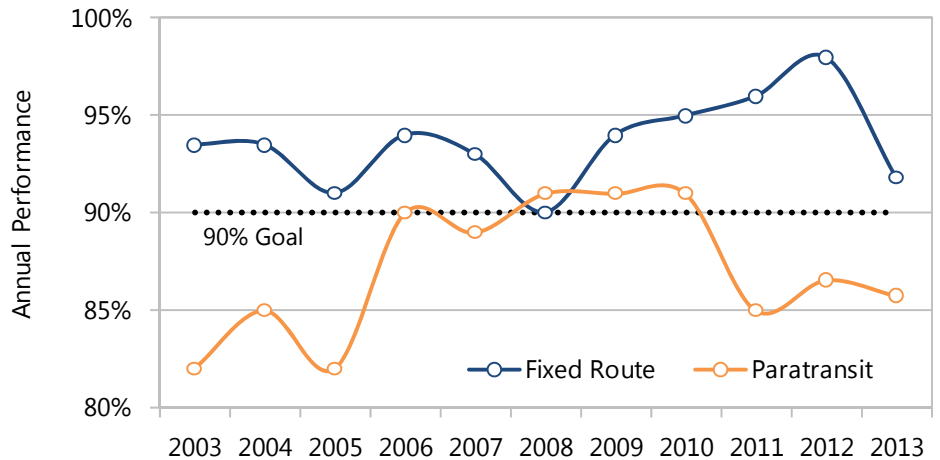
Sources: DTC, Cecil County Senior Services and Community Transit

³Data for Cecil County platform hours is not available.

Transit Reliability

- In the last decade, DTC has consistently reached or exceeded their on-time performance goal of 90% for their fixed routes.
- After several years of improved efficiency for fixed route service, a 6% drop in reliability occurred in FY 2013.
- Paratransit has struggled to maintain and exceed the 90% goal. Since FY 2010, reliability lagged considerably compared to fixed route service.

Figure 21: DTC On-Time Bus Performance, FY 2003-2013



Transit Route Mileage

- From FY 2003 to FY 2013, total miles driven by New Castle County's fixed route fleet increased by 12%, or 618,000 miles.
- During the same decade, Paratransit mileage increased dramatically by 66%, or 2.07 million miles.
- Fixed route mileage peaked in FY 2012 with close to 9% growth from the previous year.
- Since FY 2004, annual mileage for trips in Cecil County grew by 75.6% and logged more than 2.3 million miles.
- In 2007, a new route to Perryville was added. This spurred a 115% increase in miles for fixed routes from the previous year.
- Since 2007, fixed route mileage has outpaced DRT, except in FY 2013 when DRT pushed ahead with roughly 3,000 additional miles.
- Between FY 2010 and FY2013, fixed route service mileage dropped by 2% and DRT grew by 27%.

Figure 22: Transit Route Mileage in New Castle County, FY 2003-2013

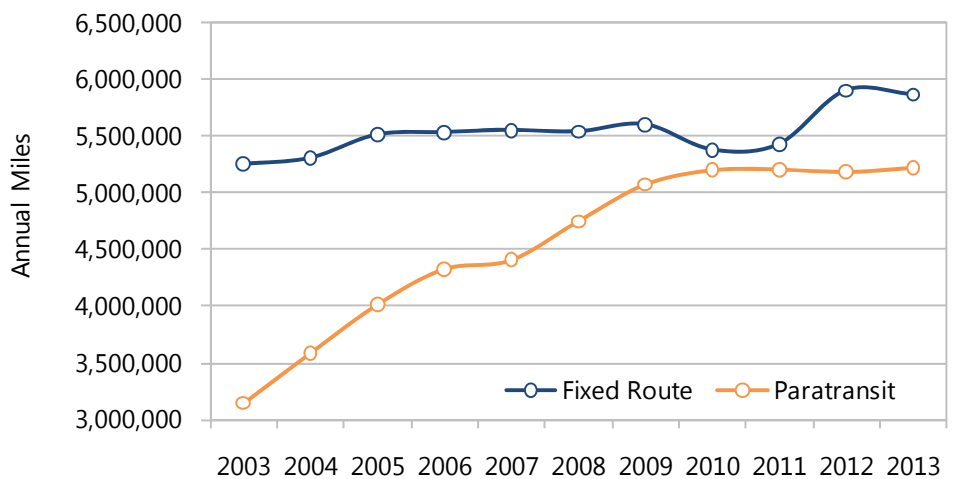
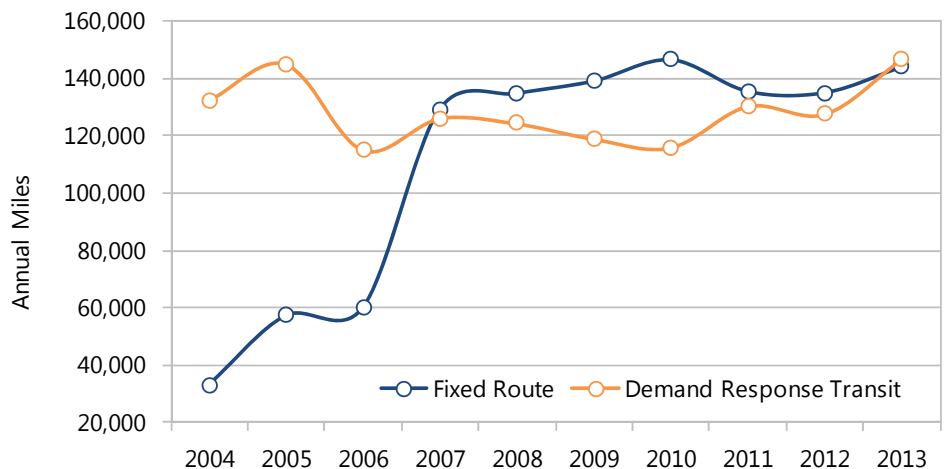


Figure 23: Transit Route Mileage in Cecil County, FY 2004-2013



Sources: DTC, Cecil County Senior Services and Community Transit

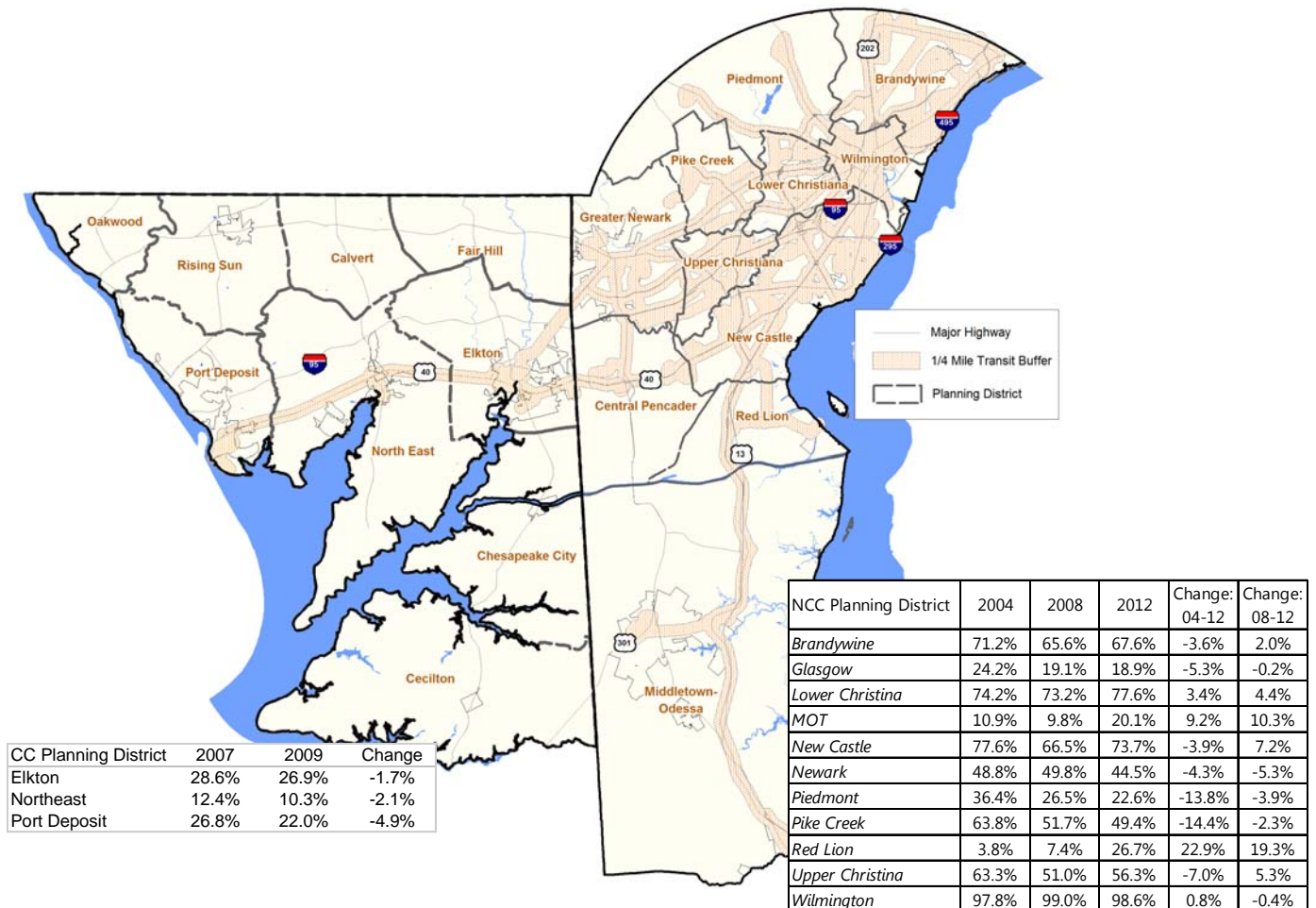
Transit Access

- Between 2004 and 2014, New Castle County residents living within an acceptable walking distance, or one-quarter mile, of a transit stop dropped by 14,000, or 5%. This decline in accessibility to bus services in New Castle County corresponds with a shift in growth away from the dense I-95 corridor, which consists of DART's core service area.
- Likely due to a new route and the expansion of an existing bus route, a greater number and percentage of Cecil County residents are within walking distance of a transit stop. Over the ten-year period, transit accessible residents grew in the County by 126%.
- Region wide, the total number of residents with adequate transit accessibility has remained relatively stable, yet the percentage of residents within walking distance to a bus stop is progressively declining.

Figure 24: Percent of Population within Walking Distance of a Transit Stop, 2004-2014

County	2004	2007	2009	2011	2014
New Castle	284,404 (54.7%)	281,359 (52.8%)	283,209 (52.4%)	279,393 (51.5%)	270,310 (48.5%)
Cecil	3,441 (3.7%)	6,601 (6.4%)	8,409 (8.2%)	21,620 (20.3%)	7,808 (7.5%)
Regional Total	287,845 (46.9%)	287,960 (45.3%)	291,618 (45.4%)	301,013 (46.4%)	287,118 (42.1%)

Figure 25: Bus Transit Accessibility for Households by Planning Districts



Sources: DTC, WILMAPCO

Park and Ride Facilities

- Park and Ride lots allow individuals to park their car and ride transit and Park and Pool lots allow individuals to meet and carpool or vanpool to work or other destinations.
- There are forty Park and Ride or Pool locations in New Castle County. Five Park and Ride/Pool facilities serve Cecil County, and are mostly located along the I-95 corridor.
- From 2008 to 2012, the total number of available in the region spaces increased by 797 or 18%, however overall usage decreased by 4%. Capacity declined by close to 10%.
- Since 2008, Newark and Fairplay Train Station’s accounted for 210 new parking spaces added in the region.

Figure 26: WILMAPCO Park and Ride/Pool Usage, 2008-2012⁵

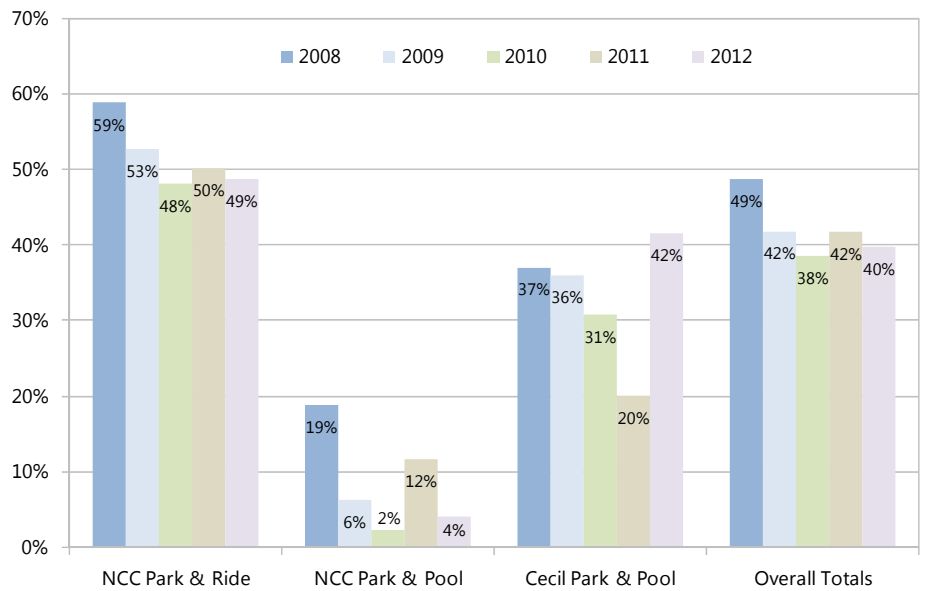
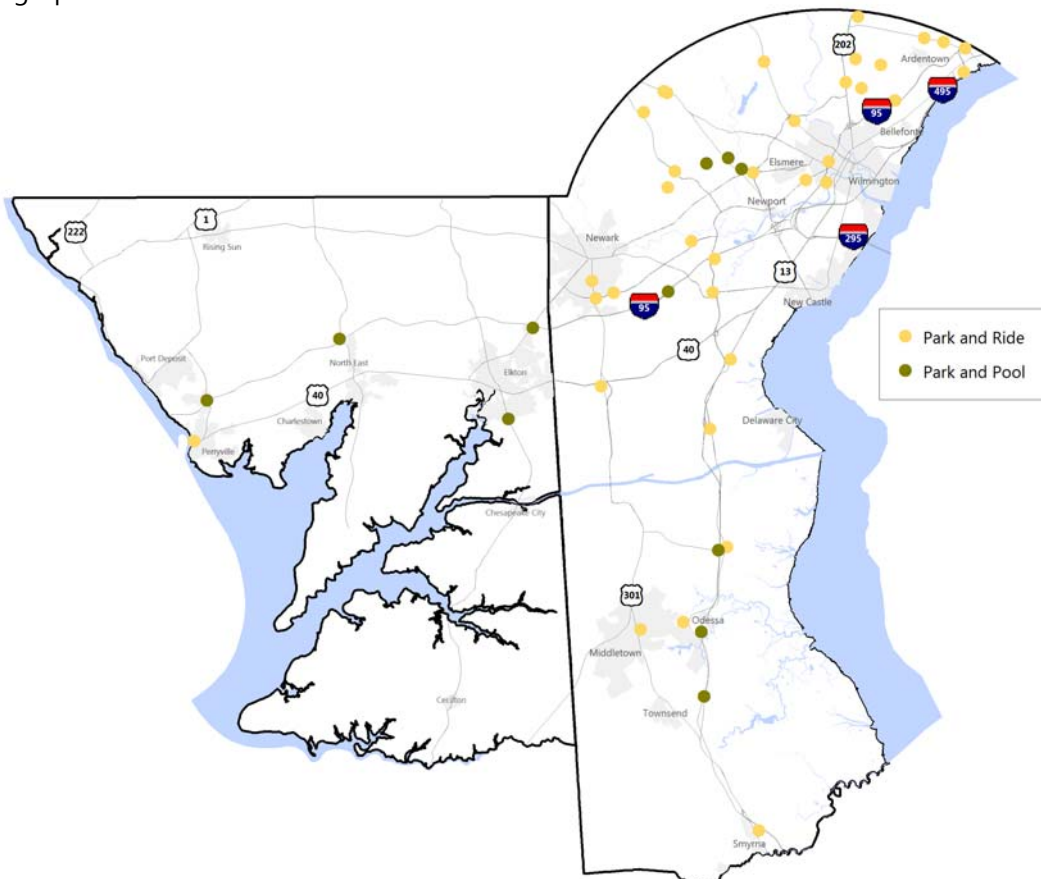


Figure 27: WILMAPCO Park & Ride/Pool Locations



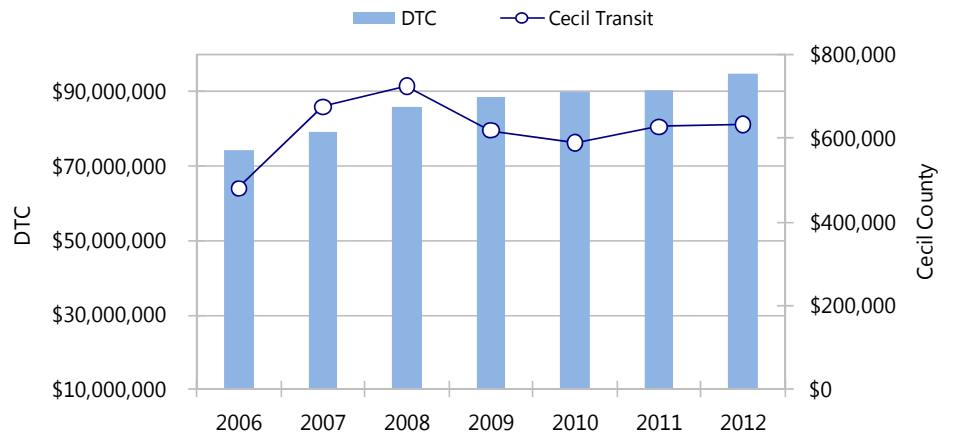
Sources: WILMAPCO, DTC, MTA, and Cecil County Senior Services and Community Transit

⁵ Figures do not include usage changes at the Cecil County Park & Ride Facility at the Perryville Train Station.

Transit Operations Expenditures

- DTC's total operation costs have climbed steadily by 28% from \$74 million in FY 2006 to \$95 million in FY 2012.
- From FY 2006 to FY 2012, operations for Cecil County transit services have increased by 32%.
- As transit operations costs continue to rise, less funding remains available for capital improvements.

Figure 30: Transit Operating Costs, FY 2006-2012



Transit Operating Funding

- Operating assistance for both federal and state funding for DTC have increased between FY 2007 and FY 2012, by 9% and 19%, respectively.
- The largest sum of state funding assistance to DTC was in FY 2012 at just over \$77.5 million.
- Between FY 2006 and FY 2010, Cecil County public transit services received over \$1.1 million in state and federal funding.
- Opposite of DTC, federal funding for Cecil County transit services has increased sharply by 87% (from \$67,000 to \$125,000) and state contributions have dipped by 59% (from \$270,000 to \$110,000).

Figure 31: DTC's State and Federal Funding, FY 2007-2012

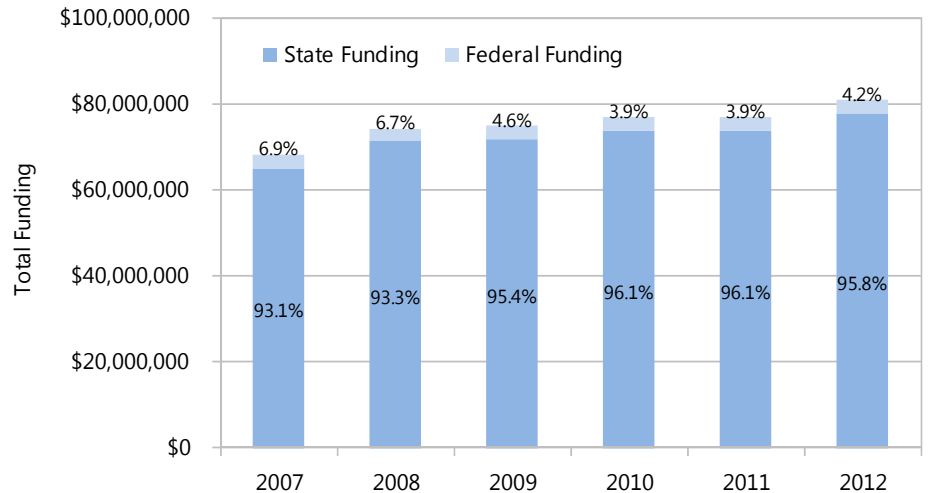
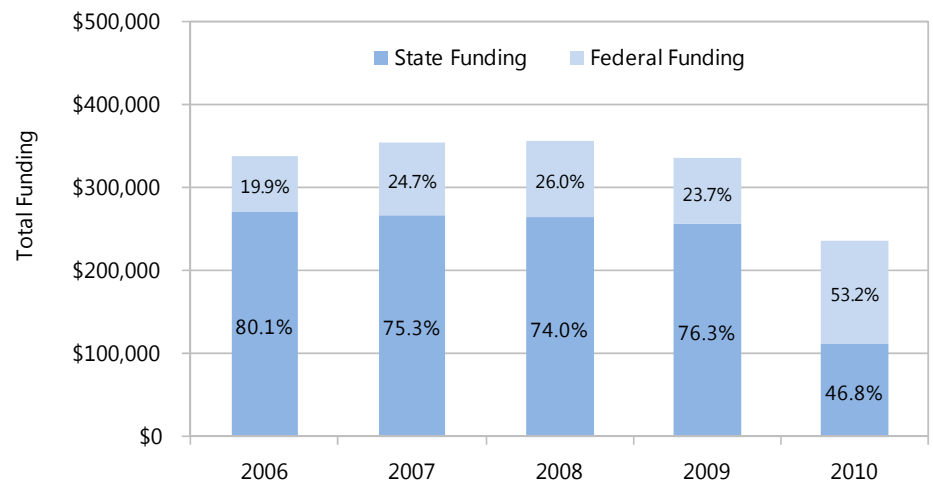


Figure 32: Cecil County State and Federal Funding, FY 2006-2010



Sources: DelDOT Base Financial Plan 2009-2012, DTC Financial Reports 2008-2012, and Cecil County Transit Services

Regional Transit Investments

The Transportation Improvement Program (TIP) is a document that outlines a variety of capital transportation projects funded over a four-year period in the WILMAPCO region. Regional transit projects in the TIP typically include the upkeep or expansion of transit facilities and the replacement and refurbishment of revenue vehicles. Total funding has increased by 147% from \$751 million in the FY 2003 TIP to \$1.8 billion in the FY 2015 TIP. Similarly, transit funding grew substantially (235%) between the FY 2003 and FY 2015 TIPs. Nevertheless, since the FY 2005 TIP, roadway projects have consistently received the lions share of overall funding for each new TIP.

Figure 33: TIP Funding by Mode, FY 2003 - FY 2015

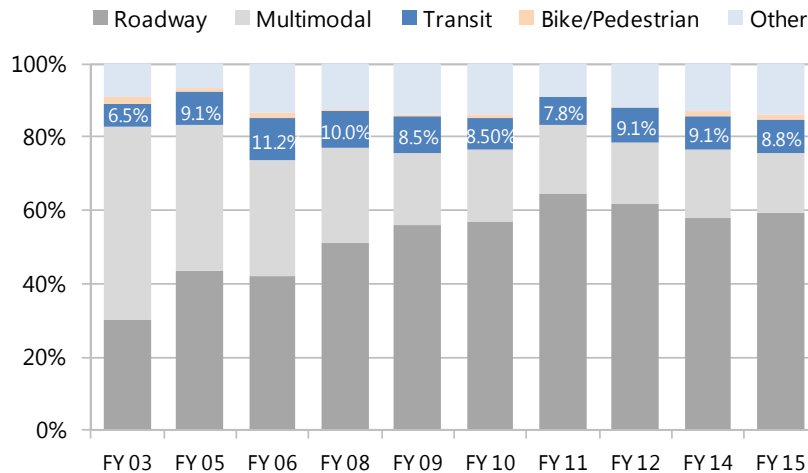
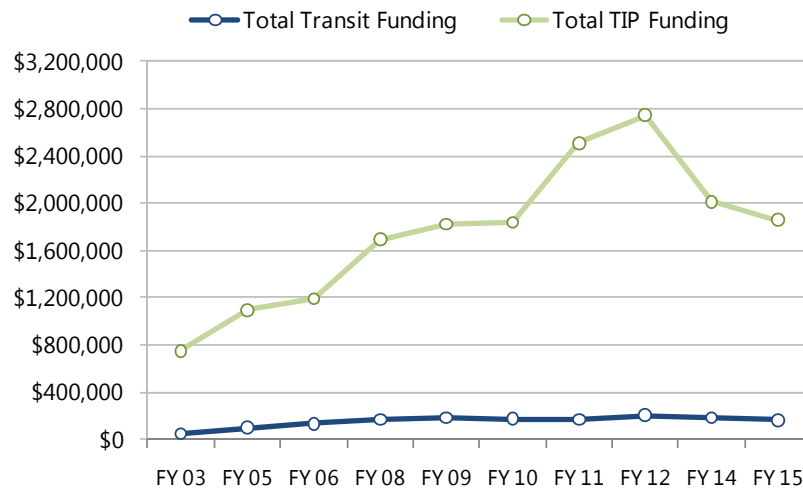


Figure 34: TIP Funding, FY 2003 - FY 2015

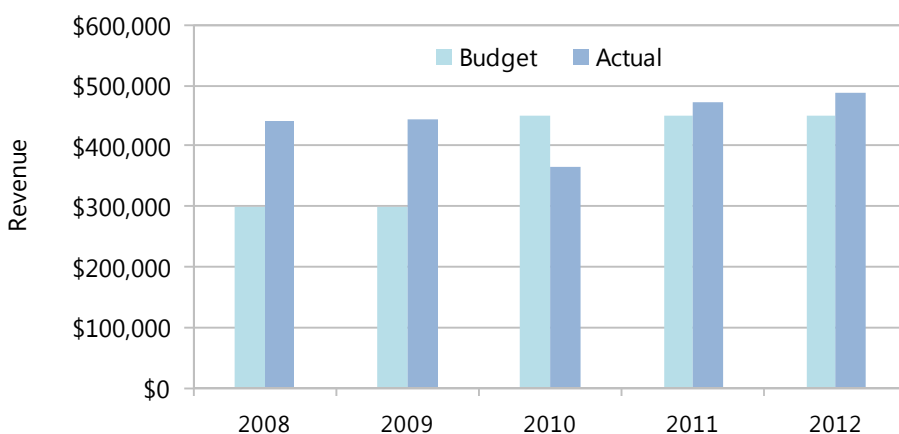


Investments in transit are necessary to meet projected transit service demand based on census data. However, despite substantial increases in overall TIP funding and strong ridership growth, capital transit projects represent an average of only 9% of our total transportation projects in the past ten TIP cycles.

DTC Advertising Revenue

- Unique and eye catching ads on buses, shelters, and train platforms are permitted as a means to generate non-fare box revenue that can be reinvested into the transit system. In 2010, DTC raised their advertising budget from \$300,000 to \$450,000 annually.
- DTC has consistently exceeded the budgeted revenue from advertising, with the exception of 2010, when the advertising revenue was less than \$85,000 short of the budget. In 2012, DTC collected close to \$500,000 in advertising revenue, an 11% increase since 2008.
- However, DTC’s advertising revenue is fairly modest. In FY 2011 and 2012, advertising revenue comprised 3% of DTC’s total operating revenues.

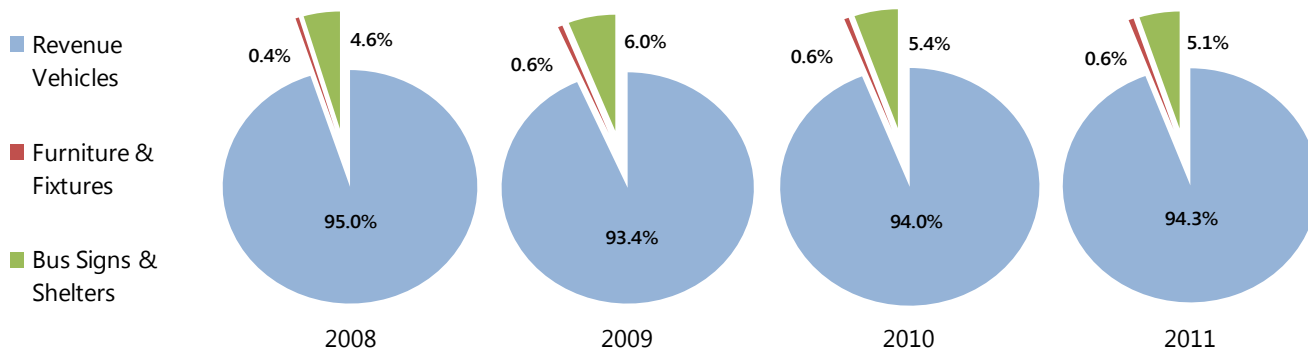
Figure 35: DTC Advertising Revenue, FY 2008-2012



DTC Capital Assets

- Managing capital assets, such as buildings, communications equipments, service vehicles and equipment, is critical for analyzing operating costs and contributes to a reliable transit system.
- There has been a steady increase in spending on statewide capital assets such as transit amenities and revenue vehicles. Between FY 2008 and FY 2011 the total amount of funds spent on revenue vehicles, furniture and fixtures, and bus signs and shelters increased by 5.7%. In FY 2011, \$21.4 million was invested into capital assets, primarily for the purchase of revenue vehicles.

Figure 36: DTC Statewide Investments in Selected Capital Assets



Source: DTC Financial Reports for 2008-2012

Transit Trends, Overall Observations

- In the WILMAPCO region, the absolute number of passengers that use transit has grown for fixed route, demand response, and commuter rail. Much of this increase can be attributed to gains in overall population. For fixed route buses in New Castle County, substantial growth has taken place on existing routes as few new routes have been added over the years. The opposite is true for Cecil County. A new route connecting more residents to destinations across the county has contributed significantly to increased passenger rides in Cecil County.
- Public requests for demand response services continue to grow in both Counties. The costs of these non-fixed trips place a disproportionate burden on the overall system, and transit revenues can not keep pace. As a result, transit operating expenditures are expected to continue to climb as they have in many years past. This will also be exacerbated by the senior and disabled populations projected to grow substantially in the future.
- Some indicators of transit level of efficiency such as on-time performance, vehicle platform hours and route mileage continue to improve for fixed route bus services in the region.
- However, lagging regional transit investments and declining transit accessibility may hinder latent demand for transit. Future investments and service improvements, along with increased population and employment density could help strengthen the delivery of transit services in the region.



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March 2014 — WILMAPCO DATA REPORT #8 UPDATE

The Wilmington Area Planning Council (WILMAPCO) is a Metropolitan Planning Organization serving New Castle County, DE and Cecil County, MD. Our mission is to serve the citizens and stakeholders of the region by carrying out a comprehensive, continuing and cooperative regional transportation planning process consistent with federal transportation legislation. This series of data reports is designed to summarize various data and information about our region to allow decision makers and members of the public to better understand the changes within our region. This document was created by the WILMAPCO Demographics and Data Subcommittee. For more information on this and other data reports, please visit our website at www.wilmapco.org/data.

Other WILMAPCO Data Reports

Report #1: Regional Population Changes
 1980-2000, September 2004

Report #2: Changes in Regional Population &
 Household Characteristics 1980-2000, Decem-
 ber 2004

Report #3: Analysis of Commuter Flows to and
 from the WILMAPCO Region 1990-2000, July
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Report # 4: Regional Population Changes:
 2000-2030, January 2006 (updated May
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Report #5: Employment: 1990-2004, July
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Report #6: Crash Data: 2000-2006, Septem-
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Report #7: Travel Times: 2000-2007, Decem-
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Report #8: Transit Trends: 2000-2007, July
 2009 (updated February 2014)

Report #9: DeIDOT's Household Survey for
 New Castle County: 1995-2007, July 2009

Report #10: Highway Emissions by Segment
 in New Castle County, June 2010