

THE CONNECTED REGION

GREATER CINCINNATI & NORTHERN KENTUCKY

A 2015 Regional Indicators Report

TRANSIT



ABOUT THIS REPORT

This Regional Indicators Report acknowledges the strong relationship between a vibrant economy and a robust regional transit system. Whether it's a critical support to connect people to jobs and greater self-sufficiency, or a preferred mode of travel for a young professional seeking to live without a car, transit matters.

Leveraging transit for economic prosperity requires crafting a vision of what *could* be and then building a plan to make it happen. Regions we compete with for people and jobs have used community-driven processes and innovative public-private partnerships to develop bold plans that complement and grow existing systems and introduce new modes of travel.

In these pages, we look not just at transit (scheduled bus and rail services) but also at multiple modes of travel that interact with public transit and that support a lifestyle that is less dependent on private cars for everyday needs. These include walking and bicycling, but also on-demand and sharing systems for both bikes (Red Bike) and cars (Zipcar, Uber, Lyft).

Transit is already an integral part of our region. Buses move more than 21,000 commuters to jobs every day and serve many more thousands in daily trips for goods and services. Some 20,000 people in our region walk to work every day, and another 3,000 ride bikes.¹

As the Greater Cincinnati regional job market expands², baby boomers continue to age, urban living grows, and the cost of car ownership rises, a more robust regional public transit system will only become more important to our economy.



STATE OF THE SYSTEM

The Cincinnati region currently has seven separate public transit systems. Metro, the largest, serves 81% of all transit trips in the region with the majority of its service within the City of Cincinnati. The second largest system, TANK (with 17% of trips), serves Boone, Campbell and Kenton counties in Northern Kentucky. Smaller systems include the Butler County Regional Transit Authority, Dearborn County Catch-A-Ride, Clermont Transportation Connection, Middletown Transit Service and Warren County Transit System. The Cincinnati Streetcar is slated to open for service in September 2016, offering a new transit option in the urban core.

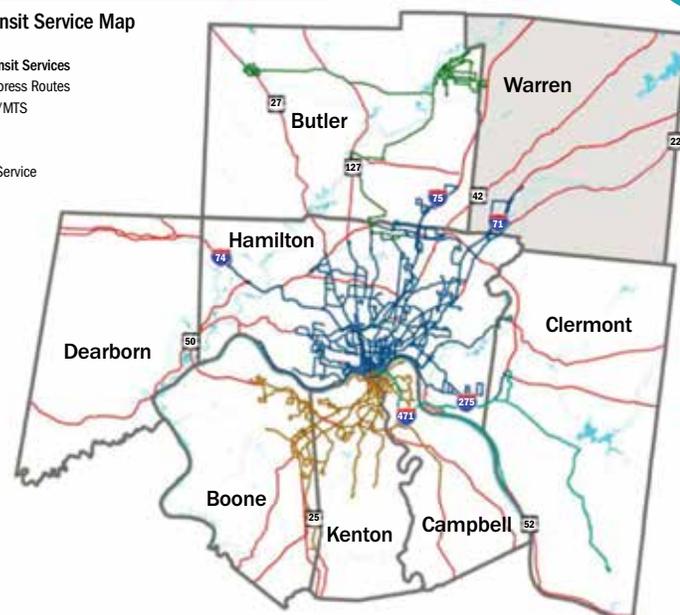
Seven of the 12 regions in our peer set have rail systems of various capacity and extent. The portion of transit trips carried on rails varies from a high of 35% in St. Louis to a low of 2% in Austin. Over all regions, 87.4% of trips are made by bus.³

REGIONAL BUS SERVICE MAP

Current Transit Service Map

Legend

- Fixed Route Transit Services
 - CTC Express Routes
 - BCRTA/MTS
 - TANK
 - Metro
 - WCTS Service
- Major Roads
- Rivers & Lakes



* OKI 2015. All data included in this report is for the 15-county MSA. This map shows the 8 counties where transit service is located.

KEY INSIGHTS

- Minneapolis, Denver and Pittsburgh have spent the most on public transit in recent years and also have the highest ridership rates.
- Gross differences in transit spending are partly explicable by funding sources: Pittsburgh and Minneapolis have more than 50% of their operating costs covered by state subsidy. In the Tristate, subsidies have historically been low; systems in our region get about 0.2% of their operations from state.
- In Denver, a regional sales tax levy provides a steady stream of capital funding (in the billions) for an expanding regional system. However, in Cincinnati, each jurisdiction decides if they will support transit and at what level.
- Nationwide, millennials are taking fewer trips, shorter trips and a larger share of trips by modes other than driving. This decline was mostly due to the 2008 recession, but the fact that many Millennials have not returned to cars with the economic recovery may indicate that we are experiencing a “new normal.”
- Locally, Millennials (18-34) are still driving at a high rate, but growth of Millennial drivers has been slowing along with national trends. Between 2000 and 2013 (1), all peer regions—except for Cincinnati—saw a drop in the percentage of Millennials commuting by car. It’s hard to know whether Cincinnati’s patterns are the result of choice or a lack of options.

HOW TO READ THIS REPORT

Like all Regional Indicators Reports, The Connected Region compares the Cincinnati MSA with 11 peer cities* that we know we compete with for people and jobs. In all Regional Indicators Reports, regions are ranked by performance under each indicator. The number one position is generally considered “best.”

*Austin, Charlotte, Cleveland, Columbus, Denver, Indianapolis, Louisville, Minneapolis, Pittsburgh, Raleigh and St. Louis

INNOVATIVE TRANSIT TECHNOLOGY

New technologies like real-time transit data that tells a commuter when the next bus is arriving and mobile applications that allow you to review opportunities for travel on multiple transportation modes have made it possible for more people to lead full and active lives without owning a car. Each of these tools is valuable on its own, but combined with transit and walkable and bikeable infrastructure, they make for a robust transportation system.

In this report, “region” and “Cincinnati” refer to the federally defined 15-county Cincinnati-Middletown-OH-KY-IN Metropolitan Statistical Area (MSA). The data for peer regions also refers to the respective MSAs.

A VIEW FROM THE SUBURBS

“ Strategic routes and partnerships connecting people to businesses, jobs, healthcare and shopping benefit our economy and restore a level of dignity and pride to our residents.

Successful connections contribute to the vitality of our businesses and communities. The return on investment can be significant. Statistics from the Economic Development Research Group show that a \$1 investment in public transit has a rate of return ranging from \$4-\$9.

”

CHRISTINE MATACIC

Liberty Township trustee and OKI board member



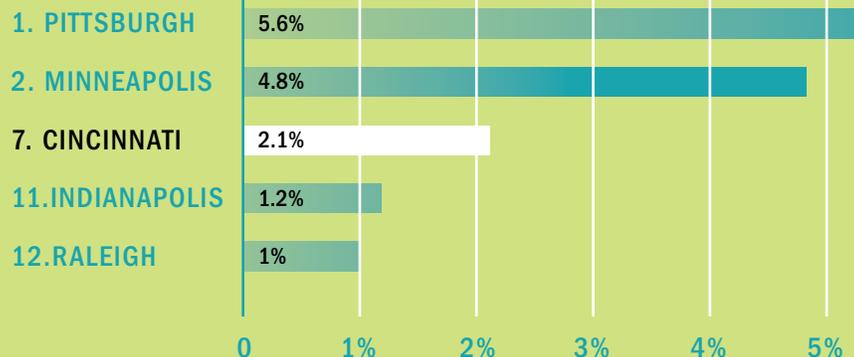
TRANSIT USE PER CAPITA ¹

This indicator shows the average number of trips per person made on transit each year. Many people never use transit, and many others use it every day, so this is not meant to be a measure of the average person's experience; it is a measure of overall transit use. With an average of 10 trips annually per person, Cincinnati is ninth among peer regions. For the sake of comparison, the Chicago metropolitan area has about 44 annual transit trips per capita.

1. DENVER	37.1
2. MINNEAPOLIS	27.4
9. CINCINNATI	10.0
11. RALEIGH	7.7
12. INDIANAPOLIS	5.5

WORKFORCE COMMUTING BY TRANSIT ²

This indicator shows the percentage of workers commuting by bus or rail. Cincinnati ranks seventh and performs below both the national average of 5.2% and below the peer-city average of 3.1%. In order for the Cincinnati region to reach Pittsburgh's rate, 35,000 more people would have to switch to transit for their commute.



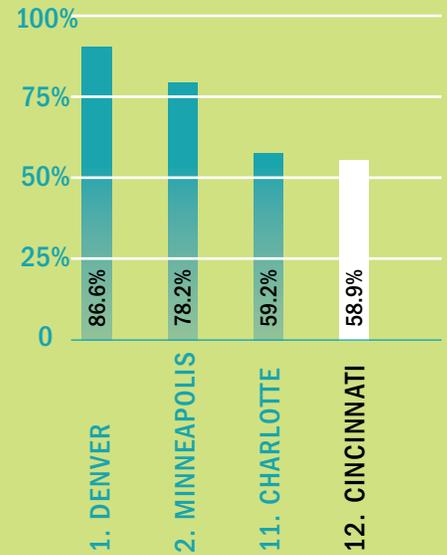
1. Annual unlinked passenger trips per capita, National Transit Database, 2011-2013 average and ACS 2012 population estimates

2. Workers 16 and older, ACS 2014, 1-year estimate



SHARE OF JOBS IN NEIGHBORHOODS WITH TRANSIT ¹

Many parts of each region are inaccessible by public transit, with the effect that some employment opportunities are literally out of the reach of transit users, particularly in suburban areas. Cincinnati ranks last in this indicator, with only 58.9% of our region's jobs reachable by public transit.



ACCESS TO JOBS USING TRANSIT ¹

This measure is an average of each job's accessibility to workers by transit in 90 minutes or less. The portion of the workforce that can reach a job is significantly reduced when commutes stretch longer than 90 minutes. The Cincinnati region's job access rate is roughly half of Denver's, the top performing region, with jobs accessible by transit connecting with only 22.5% of the region's working population.

1. DENVER	45.6%
2. AUSTIN	30.1%
7. CINCINNATI	22.5%
11. RALEIGH	21.8%
12. PITTSBURGH	20.5%



TRANSIT DRAWS JOBS TO THE REGION

“ In one of our first meetings with General Electric's site selection team for its U.S. Global Operations Center, direct access to safe and convenient multiple modes of transportation was important.

Cincinnati's commitment to build the streetcar, in combination with other existing and potential transit-related development, were factors we discussed as GE chose The Banks.

TOM GABELMAN
Hamilton County Counsel, The Banks



1. Brookings Institution, *Where the Jobs Are: Employer Access to Labor by Transit*, 2012

WORKFORCE WALKING OR BIKING TO WORK ¹

This indicator shows the percentage of workers either walking or riding a bike to work. Pittsburgh has the largest share of pedestrian commuters at 3.4%, and Austin has the largest share of bicycle commuters, at 0.7%. In real numbers, the Cincinnati region is estimated to have roughly 3,000 bike commuters and about 20,000 people commuting on foot.

1. PITTSBURGH	3.9%
2. MINNEAPOLIS	3.4%
6. AUSTIN	2.4%
7. CINCINNATI	2.3%
11. INDIANAPOLIS	1.6%
12. RALEIGH	1.5%

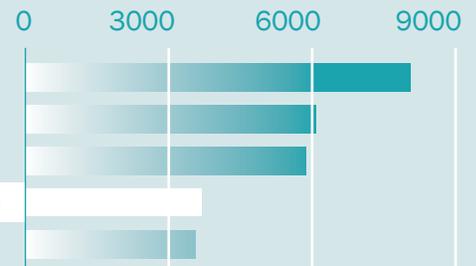


JOBS ACCESSIBLE BY A WALK OF 30 MINUTES OR LESS ²



Nationally, walking is the third most common way to commute after driving and transit. Walking to work accounts for 2.8% of trips to work nationally and roughly 5% of such trips in large cities. In Cincinnati walking accounts for about 2.0% of commutes.

1. DENVER	8,191
2. MINNEAPOLIS	6,063
3. AUSTIN	5,916
11. CINCINNATI	3,290
12. LOUISVILLE	3,236



MILLENNIALS COMMUTING BY CAR ³



Locally, Millennials (18-34) are still driving at a high rate, but growth of Millennial drivers has been slowing along with national trends. For the period between 2000 and 2013 ⁴, all peer regions—except for Cincinnati—saw a drop in the percentage of Millennials commuting by car.

1. PITTSBURGH	82.5%
2. DENVER	85.4%
9. CINCINNATI	91.3%
11. LOUISVILLE	91.9%
12. INDIANAPOLIS	93%

BICYCLING

Like most American regions, Cincinnati has seen growth in the number of cyclists hitting the roads in recent years. Only a small share of all trips are made by bike, but the number is growing quickly. We've responded by implementing a regional bike-sharing system and adding bike lanes on some frequently used routes.

Cycling, besides having the potential to replace short car trips, is also an important last-mile solution, allowing people access to transit from places that are outside of walking distance from a stop or station.

1. Workers 16 and older, ACS 2014, 1 year estimate

2. University of Minnesota, Access Across America: Walking 2014

3. ACS 2009-2013 5-year estimate

4. Census 2000 and ACS 2009-2013 5-year estimate

TRANSIT OPERATIONS FUNDING PER CAPITA ¹

Operations funding is the money that keeps a transit system in motion every day. Generally speaking, the more money there is to pay for service, the more service there will be. As an example, if operations funding increases, a service might extend later into the evening or operate more frequently, reducing wait times. The amount of money spent on operations is strongly correlated with the number of people using transit.

1. DENVER	\$180.24
2. PITTSBURGH	\$161.63
9. CINCINNATI	\$52.28
11. INDIANAPOLIS	\$31.48
12. RALEIGH	\$27.54



TRANSIT OPERATIONS FUNDING FROM FARES ²

All transit systems are subsidized by public funds, with only a portion of the total cost paid directly by customers. Even though Cincinnati does not rank highly in terms of overall public funding for transit, our region does a good job of managing its resources in such a way that many people are still willing to pay fares to use transit. Depending on your perspective, this ranking could be inverted due to the relatively large responsibility placed on the rider and the relatively limited responsibility placed on the larger community.

1. CINCINNATI	32.6%
2. MINNEAPOLIS	27.6%
11. LOUISVILLE	16.9%
12. AUSTIN	11.7%



TRANSIT CAPITAL INVESTMENT PER CAPITA ³

Capital funding supports physical improvements that are necessary for transit to operate and to operate efficiently. Capital investment can also increase the range of a system or provide infrastructure for future improvements. However, transit service is still wholly dependent on the availability of operations funding to sustain service.

1. DENVER	\$264.45
2. MINNEAPOLIS	\$127.23
9. CINCINNATI	\$12.99
11. LOUISVILLE	\$5.54
12. INDIANAPOLIS	\$4.28



WHY DOES THIS MATTER?

Over the last few years, the nation has been having a broad discussion about the importance of public transit. People from our region have hardly been quiet observers of this discussion; transit debates here are often fractious and unproductive. The essential division is not about whether we can or should have transit service, but whether it's worth the money and who will pay for it.

After decades of declining investment in transit, many regions—including those that perform well in this report—are taking this moment of introspection to reinvest in their transit systems, thereby reinvigorating their core cities and shifting development toward walkable neighborhoods served by transit.

It's interesting to note that competitive regions that out-perform Cincinnati on 15 top indicators of economic strength ⁴, tend to top the transit indicators as well.

As businesses and neighborhoods expand in our region, we need to think strategically about the ways in which people access jobs, goods and services, education, healthcare, recreation and more. Transit should be an important topic of discussion as we grow talent, jobs and economic opportunity in service to a more vibrant region.

1. National Transit Database, Average for 2011, 2012 & 2013 and ACS 2012, 1-year estimate

2. National Transit Database, Average for 2011, 2012 and 2013

3. National Transit Database, Average for 2011, 2012 and 2013 and ACS 2012, 1-year estimate

4. regional-indicators.org

TRANSIT'S IMPACT ON HEALTH

In walkable, bikeable and transit-oriented communities people are more physically active and have lower body weight.

“ Most Americans spend an average of only six minutes walking each day. Public transit users spend an average of 19 minutes walking each day, getting them much closer to the 22 minutes of daily walking recommended by the Centers for Disease Control for optimal health. ¹

In order to achieve health improvements, roads need to be designed to be pedestrian, cyclist and public-transit friendly and allow people to use active transportation methods in their everyday lives. Increasing active transportation options leads to improvements in rates of diabetes, obesity and cardiovascular disease. ²

MEGAN FOLKERTH
Program Officer, Interact For Health

1. *Better Transportation Options=Healthier Lives*

2. *Centers for Disease Control and Prevention, Transportation Health Impact Assessment Toolkit*

TRANSIT AND THE ENVIRONMENT

“ Transit produces significantly lower greenhouse gas emissions per passenger mile than private vehicles;

33% less in the case of buses. The average 40-passenger bus only has to carry seven passengers to be more efficient than the average single-occupancy vehicle. ¹

Sharing rides through public transportation decreases the need to build more transportation infrastructure and manufacture new vehicles, meaning fewer environmental impacts and improved regional air quality. Transit also saves fuel as it reduces the number of vehicles stuck in gridlock that waste fuel and generate emissions.

KRISTIN WEISS
Executive Director, Green Umbrella

1. *"Public Transportation's Role in Responding to Climate Change," Federal Transit Administration, Updated 2010*