

2006 Paratransit Survey

Recruitment and retention of drivers as well as meeting service demand remain the greatest challenges for paratransit providers. The third annual survey reveals continued growth from the private sector and more public agencies turning to integration of demand response with fixed-route service.

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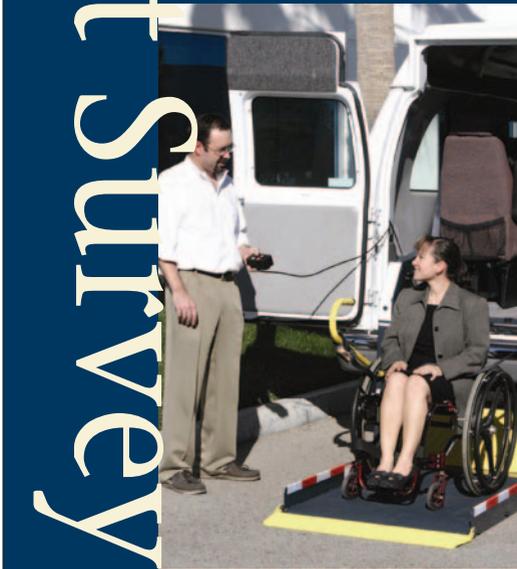


Paratransit (also called demand response or dial-a-ride) ridership increased by 2.5% in 2005, and in the first quarter of 2006 this mode of transport increased by 3.7%, compared to the same period last year, according to **American Public Transportation Association** statistics. And the numbers will continue to grow as the baby boomers age.

According to a national survey of individuals age 65 and older, conducted by **Harris Interactive®** in November 2005, more than four in five seniors believe public transportation is a better alternative to driving alone, especially at night, and 83% agree that public transit provides easy access to the things that older adults need in everyday life. The survey also found that two-thirds of seniors believe their communities need more public transportation services targeted specifically for older adults.

In December 2005, the White House Conference on Aging ranked transportation options for older Americans to be among the top three priorities facing seniors. The resulting "mobility resolution" calls for expanding transportation options for seniors, increasing funding for public transportation targeted to seniors' needs and coordinating 62 federal programs that support transportation services at the local level. Hopefully, these resolutions will relieve some of the pressure felt by operators straining to meet the present paratransit demands.

The demand for increased services for the aging population is also apparent in **METRO's** third annual survey analysis. We selected 36 random paratransit operators, which included a mix of public and private from the United States and Canada and asked them 11 questions on topics ranging from driver-related concerns to number of vehicles expected to purchase.



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Fleet update

A total of 10,520 vehicles are represented in this year's survey, with the largest paratransit fleet total at more than 3,500 vehicles and the smallest with three. The mean fleet size is 292 vehicles, and the median fleet has 86 vehicles.

Our survey shows that buses comprise nearly two-thirds (65.7%) of vehicle fleets (see Figure 1). Vans make up 22.6% of fleets, and taxis/sedans make up 11.7%.

Breaking down the types of buses used (Figure 2), small buses (25 feet and under) are used for the most trips, with a 74.8% share. Last year's survey showed 61% of trips were provided by small buses, illustrating growth of more than 10% for this vehicle type this year. Meanwhile, mid-size buses (26 to 35 feet) transport 24.8% of paratransit passengers. Only about one and

10 trips used large-sized buses (over 35 feet in length).

Of all respondents, 36% (Figure 3) have no plans to purchase new buses in 2007. Of those operations that have purchase plans for the coming year, three out of 10 expect to buy fewer than 10 buses. The number of vehicles that respondents plan to purchase represents nearly 11% of their total para-

tor side shows a shift in dominance by Oak Brook, Ill.-based **Veolia Transportation** and **MV Transportation Inc.** in Fairfield, Calif., each having more than 3,500 vehicles in service. Veolia became a frontrunner after its subsidiary, **Connex**, acquired **ATC** in October 2005.

Public fleet figures showed no change, with **San Francisco Para-**

Methodology

METRO surveyed 36 paratransit operators, both public and private, from around the U.S. and Canada, asking 11 questions each. In all, respondents hail from 25 states, the District of Columbia and two Canadian provinces. Some of the respondents didn't answer all of the questions.

transit fleet size. A majority of the new vehicles will be used as replacements.

Reviewing fleets on the private-sec-

transit operating the largest fleet with 1,700 revenue vehicles. Chicago also has a major presence, with

5 Notable Private Paratransit Providers

(by vehicles under contract)

1. Veolia Transportation Inc.	3,892
2. MV Transportation Inc.	3,555
3. Laidlaw Transit Services	2,568
4. First Transit	635
5. McDonald Transit Associates	213

There have been some sizable shifts on the private side of transportation with the acquisition of ATC by Connex in late 2005, which now operates as Veolia Transportation, with 3,892 paratransit vehicles currently in service. Another private paratransit service provider, MV Transportation, is also gaining ground with a total of 3,555 vehicles in service, which includes the Washington, D.C., MetroAccess program. On the public side, San Francisco's paratransit fleet remains at the top, with a total of 1,700 revenue vehicles. As the need for paratransit service continues to grow, so do the costs, leading some public agencies to contract service to the private sector.

10 Largest Public Paratransit Agencies*

(by number of revenue vehicles)

1. San Francisco Paratransit	1,700
2. Chicago Transit Authority	1,277
3. Metropolitan Transit Authority of Harris County (Houston)	1,070
4. MTA New York City Transit	572
5. Access Services Inc. (Los Angeles)	571
6. Milwaukee County Transit System	479
7. King County Department of Transportation (Seattle)	468
8. Access Transportation Systems Inc. (Pittsburgh)	457
9. Pace Suburban Bus Division (Chicago)	435
10. Massachusetts Bay Transportation	431

*Source: American Public Transportation Association, 2006 Fact Book

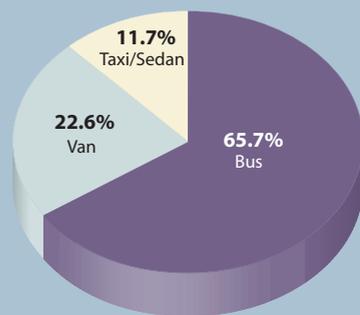
Chicago Transit Authority possessing the second-largest paratransit fleet (1,277) and the city's suburban bus division, PACE, the ninth-largest with 435 total vehicles.

Purchase plans

Of all respondents, 64% (Figure 3) plan to purchase new buses in 2007, a

Figure 1

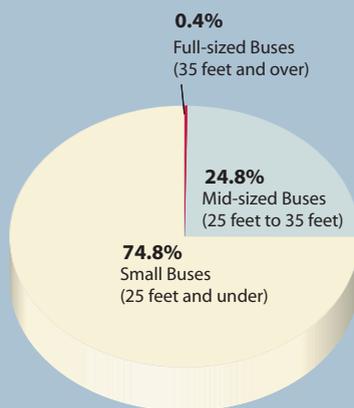
Percentage of Paratransit Vehicles by Type



Because of the nature of paratransit service, in which a small number of passengers are transported at one time, large vehicles are rarely used. Although buses comprise the largest share of the type of vehicle used, it is small-sized buses that make up the bulk of this category. Although van usage is not nearly as dominant as buses, with a 22% of the fleet mix total, it is still an important form of conveyance for demand-response service.

Figure 2

Bus Breakdown



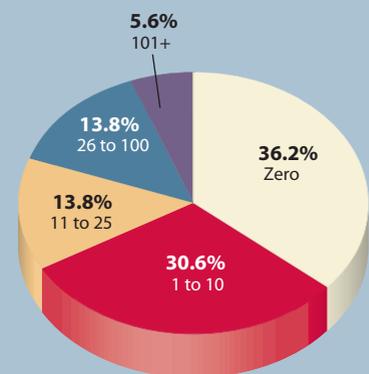
Small buses (25 feet and under) continue to provide more paratransit trips than any other vehicle, with a nearly 75% share. Typically, these vehicles are comprised of light duty or cutaway models. Mid-size vehicles follow with a nearly 25% share of the total fleet reported by respondents.

6% drop from last year's figures. Of those operations that have purchase plans for the coming year, three out of 10 expect to buy fewer than 10 buses. Two operations surveyed say they will buy more than 100 vehicles each. The number of vehicles that respondents plan to purchase represents nearly 11% of their total paratransit fleet size. A majority of the new vehicles will be used as replacements.

According to the survey, fare revenue represents 10.7% of total paratransit operating expenses (Figure 4). To account for growing costs, operations are looking to integrate more fixed-route service. More than half of all respondents have integrated

Figure 3

Bus Purchasing Plans



10.8% — The percentage of total fleet size that respondents plan to purchase.

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service (Figure 4), a 20% increase from last year.

We asked operations about their biggest driver-related concerns (Figure 6), and more than any other issue, respondents cited recruiting and retention of drivers (50%). Customer service issues related to drivers are also critical, say 27.8% of respondents.

Figure 4

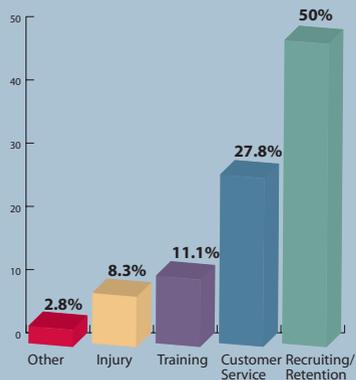
10.7% Fare revenue for paratransit service as a percentage of paratransit operating expenses.

Figure 5

23.7% The mean percentage of ridership that uses wheelchair lifts, respondents say. This is a 3.2% decrease from the 2005 survey, which may mean a shift toward usage of ramps.

Figure 6

What is your biggest driver-related concern?



Recruitment and retention remain the chief driver-related concerns plaguing paratransit providers, say 50% of respondents. Customer service, with a 27.8% share, is the second-largest issue reported. Training and injuries account for less than 20% of responses.

Driver training is not viewed as particularly challenging. It was cited by 11.1% of the respondents as their biggest challenge. Injuries to drivers are also low on the list, getting the attention of only 8.3% of respondents.

Key challenges listed

Paratransit providers listed numerous challenges they face (Figure 9), with meeting demand for service as the most common (47.1%). Costs also proved to be a major challenge for 35.3% of respondents. Some respondents marked both meeting demand and budgets/costs as their greatest challenges, which appears to be consistent with the overall industry stance. Trying to expand services with inadequate funding has forced operations to strike a balance between the two by looking elsewhere for funding or altering service provisions. Other challenges cited by operators included customer service and integration-related issues, which both ranked low on the scale, with 2.9% apiece.

Innovations

We added a new question to the survey this year asking operations to dis-

Figure 7

Do you integrate paratransit with fixed-route service?

51.4% — Yes
48.6% — No

With a little more than half of respondents reporting integration of paratransit with fixed-route service, it looks as though operations are continuing to look for alternative means of serving customers, while reducing costs.

Figure 8

57.5% Percentage of all paratransit vehicles, including taxis and vans, that are wheelchair accessible.

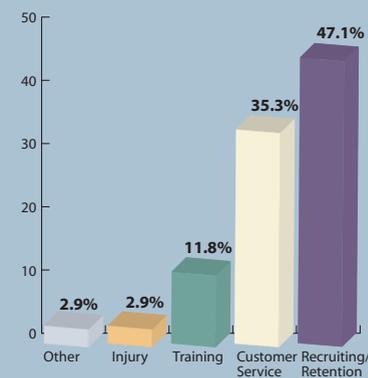
cuss innovative equipment, programs or marketing geared toward demand-response service. Nearly a quarter of respondents implemented scheduling software within the past year, while 26% equipped vehicles with mobile data computers. About 17% of operations have implemented a travel training program to help integrate riders onto fixed-route service.

To assist with its system integration, **New Jersey Transit** collaborated with two community agencies to develop the New Jersey Travel Independence Program, which helps people with disabilities develop skills and confidence needed to travel independently on the local bus.

Other innovative offerings included the use of **Drive-Cam** video systems (8.6%) to improve the safety habits of vehicle operators and record passenger incidents. Nearly 9% of respondents reported the use of GPS equipment for vehicle tracking. **M**

Figure 9

What is your biggest challenge?



A number of issues were reported by respondents, which were narrowed down to five categories: customer service, integration, staffing, budget/costs and meeting demand. For the second year in a row, "meeting demand" tallied the most responses, with nearly 50%. This said, demand for service is usually coupled with budgetary constraints, which showed a marked increase as well with 35.5% reporting. Service contracts and "geographical concerns" such as weather and traffic, were cited as challenges last year, but made no showing this time around.