Public Transit Route Performance Review

Annual Report for State Fiscal Year (SFY) 2018

February, 2019

Prepared for VTrans by:

in association with
## KEY OF VERMONT TRANSIT SYSTEMS AND DIVISIONS

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT</td>
<td>Advance Transit</td>
</tr>
<tr>
<td>GMCN</td>
<td>Green Mountain Community Network, Inc.</td>
</tr>
<tr>
<td>GMT-Rural</td>
<td>Green Mountain Transit-Rural (previously GMTA)</td>
</tr>
<tr>
<td>GMT-Urban</td>
<td>Green Mountain Transit-Urban (previously CCTA)</td>
</tr>
<tr>
<td>MVRTD</td>
<td>Marble Valley Regional Transit District</td>
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<tr>
<td>RCT</td>
<td>Rural Community Transportation, Inc.</td>
</tr>
<tr>
<td>SEVT-The Current</td>
<td>Southeast Vermont Transit-The Current (previously CRT)</td>
</tr>
<tr>
<td>SEVT-The MOOver</td>
<td>Southeast Vermont Transit-The MOOver (previously DVTA)</td>
</tr>
<tr>
<td>TVT-ACTR</td>
<td>Tri-Valley Transit, Inc. ACTR (previously ACTR)</td>
</tr>
<tr>
<td>TVT-Stagecoach</td>
<td>Tri-Valley Transit, Inc. Stagecoach (previously STSI)</td>
</tr>
<tr>
<td>VABVI</td>
<td>Vermont Association for the Blind and Visually Impaired</td>
</tr>
</tbody>
</table>
Figure 1 illustrates the service areas of Vermont’s public transit providers. The areas previously served by ACTR and STSI are now shown as Tri-Valley Transit (TVT).

Figure 1: Service Areas of Vermont’s Public Transportation Providers

Source: VTrans, December 2017
EXECUTIVE SUMMARY

VTrans manages Vermont’s public transit program, and an essential element of this management is monitoring the performance of all routes and services operated by the state’s transit providers. This Public Transit Route Performance Review for state fiscal year (SFY) 2018 presents the results of this annual performance evaluation for public transit services across Vermont. This process helps to ensure that public investment in transit is well spent by comparing performance at the route level to an appropriate standard and identifying routes and services that are in need of improvement.

As with past annual evaluations, VTrans grouped public transit routes and services throughout the state in like categories, such as Urban, Small Town, and Demand Response. The productivity (riders per unit of service) and cost effectiveness (gross operating cost per passenger trip) were calculated for each route/service. Standards based on peer groups were established for each category and then the routes/services were compared to those standards. VTrans also separately evaluated the Elders and Persons with Disabilities (E&D) Transportation Program and the local share of transit operating budgets.

In SFY 2018 Vermont’s public transit systems provided 4.74 million trips. Just under half of those rides were provided in the Chittenden County region. Statewide public transit ridership had steadily increased from SFY 2012 through SFY 2015, but in SFY 2016 experienced a 6% decrease, due to a poor 2015/2016 winter ski season and a modest decrease in GMT-Urban’s ridership following a route redesign.

In SFY 2018 Rural, Volunteer Driver, and Intercity Bus services experienced ridership gains ranging from 6% to 10%. Other categories were essentially stable, except for Express Commuter which dropped by 5%. Over the past five years, the Small Town, Rural and Tourism categories have shown small gains (less than 5%), while the Urban category and the two commuter categories have shown relatively large declines.

Policy regarding underperforming routes was established in the most recent Vermont Public Transit Policy Plan (2012). When routes are shown to be underperforming through the analysis in this report, VTrans works proactively with the subject public transit provider to determine what, if any, strategies may result in increased performance for the route. VTrans also uses the results of this performance evaluation to implement its Transit Incentive Program.
INTRODUCTION

This report is developed annually to document the results of performance evaluations for public transit services across Vermont. The results are presented to the Legislature of the State of Vermont in a high-level way as part of VTrans’ consolidated transportation system and activities report to the House and Senate Committees on Transportation. The Vermont Agency of Transportation’s Policy, Planning, and Intermodal Development (PPAID) Division, specifically the Public Transit Section, is responsible for managing the state’s public transit program. This report documents the Public Transit Section’s monitoring efforts to ensure that public investment in transit is well spent.

Vermont’s transit agencies have undergone some organizational changes in the last few years. On July 1, 2017, ACTR and STSI formally merged and now operate under the name Tri-Valley Transit (TVT). Services provided by ACTR are shown as TVT-ACTR and the services provided by STSI are shown as TVT-Stagecoach. In this report, SEVT continues to operate two divisions, The MOOver and The Current. Individual bus routes continue to be labeled with their divisional names. However, demand response services and overall financial data for TVT and SEVT are considered as wholes, rather than being separated into the two divisions. Green Mountain Transit continues to be considered as two separate divisions; GMT-Urban and GMT-Rural. This distinction reflects the urban/rural split in the Federal Transit Administration (FTA) program. VTrans authorizes GMT-Urban to be a direct recipient of funds from the FTA, whereas VTrans maintains oversight responsibility for the GMT-Rural division.

In addition to the seven transit systems in Vermont, this performance evaluation covers the volunteer driver services provided by VABVI and the Intercity bus services provided by Greyhound and Vermont Translines. Only the intercity routes that receive financial assistance from VTrans are reviewed in this report. Other intercity services (e.g., Megabus, Yankee Trails, and Greyhound’s Montreal to Boston route) operate in Vermont and cover their costs through fare revenue, arguably making them the most productive transit routes in the state. However, the private carriers do not provide data on these routes to VTrans.

The SFY 2018 performance evaluation methodology did not include any significant revisions. This report continues to:

- Assess Vermont’s transit services among nine service categories: Urban, Small Town, Demand Response, Rural, Rural Commuter, Express Commuter, Tourism, Volunteer Driver, and Intercity.
- Identify performance trends over the past five years at the state, transit agency, and route levels and additionally show some higher-level longer-term trends.
- Provide information on local funding, including fare revenue.
- Provide an overview of the Elders and Persons with Disabilities (E&D) Transportation Program. Trips provided with E&D funds are examined as part of the Demand Response and Volunteer Driver categories, but the overall effectiveness of the program is reviewed under a separate heading.
METHODOLOGY OVERVIEW

VTrans conducts monitoring of transit services by evaluating statewide trends as well as route-level performance. Several data sources were used to develop this annual report:

- The transit systems provide route-level performance data to VTrans in §5311 – Rural Transit Program Monthly Service Indicator Reports (SIRs).
- VTrans collects data on the E&D programs and volunteer driver trips from the transit providers annually.
- VTrans monitors operating budget data by funding source (federal, state, and local) in its grant tracking spreadsheets, and the transit systems provide their profit and loss statements to analyze local share.
- GMT-Urban’s route statistics and budget data were provided directly by GMT.

VTrans groups public transit routes and services throughout the state in like categories, described below. The productivity (riders per unit of service) and cost effectiveness (gross operating cost per passenger trip) were calculated for each route/service. For most categories, productivity is measured in riders per vehicle revenue hour of service, thus measuring the number of people who boarded during each hour that a bus, van, or car was operating in service. The exceptions to this are the Urban category, in which productivity is measured in boardings per vehicle revenue mile, and the Express Commuter and Intercity categories, in which productivity is measured in boardings per vehicle trip. Routes in urban areas tend to travel more slowly than rural or small town routes, due to higher levels of congestion, and so measuring based on miles does not “penalize” an operator for running a route in areas with more traffic. Express commuter and intercity trips tend to have little passenger turnover during the trip (people tend to get on at stops along the way and then all get off at the final terminal), and so the capacity of the vehicle limits the number of people who can board.

Cost per passenger is measured the same for all categories, except Intercity, where the measure is the subsidy per passenger, net of any fare revenue collected.

Standards based on peer groups were established for each category and then the routes/services were compared to those standards. As described in more detail below, these performance standards were based on the most recent available data from the National Transit Database (report year 2017).

Transit Service Categories

The service category descriptions below serve as guidelines; some routes or services may not fit every description perfectly. VTrans may also consider ridership and cost data to group similar services together.

1) **Urban**: Routes operating primarily in an urbanized area with all-day, year-round service. The city served by the route has a population of at least 17,500 people and high-density development.
2) **Small Town:** Routes operating in towns with 7,500 to 17,500 people with all-day, year-round service. The route typically stays within one town or two adjoining towns and does not run through long stretches of rural areas.

3) **Demand Response**: Primarily service that does not operate on a fixed schedule nor on a fixed route; also includes routes that might otherwise fit in the “Rural” category but operate less than once a day (i.e., service operates only once a week or a few times a month). This category does not include trips operated by volunteer drivers.

4) **Rural:** Routes operating in towns with fewer than 7,500 people or connecting two small towns running through undeveloped areas. These routes operate year-round with all-day service, but the frequency may be low (more than one hour between trips).

5) **Rural Commuter:** Routes that are similar to the Rural category above, but operate primarily during peak commute periods. These routes usually connect several small towns or villages with intermediate stops and operate primarily on state routes in rural areas. Some routes connect outlying areas to the nearby city, with a significant portion of the mileage in rural areas.

6) **Express Commuter:** Routes that operate primarily during peak commute periods and often include express segments. These routes are characterized by one-directional ridership (in most cases), longer route lengths, and serve either of the two largest employment centers in the region: the core of Chittenden County or the Upper Valley area spanning Vermont and New Hampshire. These routes primarily travel on interstate highways and provide limited stops, often serving park and ride lots and major employers (rather than other local destinations).

7) **Tourism:** Seasonal routes that serve a specific tourist trip generator, such as a ski area.

8) **Volunteer Driver:** Services provided by volunteer drivers who use their own vehicles, donate their time to transport riders, and receive reimbursement for mileage at the federal rate. This mode, unlike all of the others in this report, includes trips funded by Medicaid or other human service agencies.

9) **Intercity:** Routes operating regularly scheduled, fixed route, and limited stop service that connects places not in close proximity and makes meaningful connections to the larger intercity network.

There is one important change in how routes are classified in this report compared to the report from SFY 2017. In past years, RCT’s Jay-Lyn Shuttle and the Jay-Lyn Express were treated as separate routes, the former in the Rural category and the latter in the Rural Commuter category. With the increase in service of the Jay-Lyn Shuttle over the past few years, it has largely attained hourly service and the express trips are not separated from the local trips by a large time gap as they had been in the past. The Express is really just a limited-stop version of the Shuttle, rather than a separate route. Thus, it makes sense to consider it as one service rather than two. In addition, the combined population of St. Johnsbury and Lyndonville (approximately 8,350 together) qualify this route as a Small Town service, rather than a Rural service, especially since it now offers essentially hourly service throughout the day.

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1 Excludes ADA complementary paratransit service, Medicaid transportation, and trips by human service organizations where the transit providers have no control over scheduling or the transportation provided.
STATEWIDE TRENDS

This section describes the trends in Vermont’s transit ridership and costs in recent years, before delving into route-level performance in the next section.

Transit Ridership

In SFY 2018 Vermont’s public transit systems provided 4.74 million trips. Almost half of those rides were provided in the Chittenden County region. Figure 2 presents Vermont’s transit ridership over the past five years. Statewide public transit ridership has decreased by 2% since SFY 2014 but increased 1% over last year.

In SFY 2018 several systems saw significant ridership growth. GMCN, GMT-Rural, MVRTD, and TVT experienced ridership gains of 5% or more. Vermont Translines’ ridership continuously increased since the Intercity category was introduced in 2015, with a 33% gain in SFY 18, partly fueled by the establishment of the Vermont Shires Connector route. Greyhound’s ridership fell by 13.5%, reversing the gain seen in SFY 2017. Ridership in the urban area, which had been dropping sharply in FY 2016 and 2017, stabilized in FY 2018. More information on service category trends is available in the Trends by Service Category section of the report.

Transit Costs

In SFY 2018, total transit operating costs reached $34.1 million. The Chittenden County region accounted for approximately 37% of the total costs. In the past five years, total transit operating costs have increased by 27%, while ridership numbers have fluctuated. Figure 3 presents Vermont’s total operating costs from SFY 2014 through SFY 2018.
Cost per Trip

In SFY 2018 the average cost for a transit trip in Vermont was $7.19, a 6% increase from SFY 2017. Figure 4 illustrates the historical average cost per transit trip, which has increased by 30% in the last five years. The loss of ridership without a commensurate reduction in costs has led to this increase in cost per trip. Also, intercity bus trips, because they are much longer than local transit trips, have a greater cost per trip, and the increasing amount of intercity bus service provided in Vermont has tended to boost the overall cost per trip.

TRENDS BY SERVICE CATEGORY

Vermont’s transit systems provide an array of transit services to meet various markets and needs. The Urban service category generates the highest share of ridership statewide. Figure 5 illustrates FY2018 ridership by service category.
In SFY 2018 Small Town, Volunteer Driver, and Intercity Bus services experienced increased ridership gains ranging from 6% to 10%. Other categories were essentially stable, except for Express Commuter which dropped by 5%. Over the past five years, the Small Town, Rural and Tourism categories have shown small gains (less than 5%), while the Urban category and the two commuter categories have shown relatively large declines. Much of this drop can be attributed to lower gasoline prices. The Demand Response and Volunteer Driver categories have shown significant growth over the last five years but, to some extent, that is because new groups of riders have been included in the reporting (such as Medicaid riders on volunteer driver trips) rather than actual total ridership increasing.

Figure 6 shows the operating costs per service category as a percentage of statewide costs in SFY 2018.

Figure 6: Operating Costs by Service Category in SFY 2018

Not surprisingly, Urban service consumes a smaller percentage of the total cost compared to its share of the total ridership, because urban bus routes, which can carry 40 people or more on some trips, are more cost-effective on a per passenger basis. In contrast, Demand Response service consumes 10% of the total cost but only accounts for 3% of the total riders. This reflects the fact that many demand response trips are carrying one person, or at most a few people, at a time. Rural Commuter, Express Commuter and Intercity Bus all consume greater shares of the cost than of the ridership because these trips are generally longer and thus more costly than local trips in an urban or small town area. It should be noted that the cost for volunteer driver trips includes only the administrative cost and not the mileage reimbursement cost. Future route performance reviews will include all costs associated with volunteer driver trips.

These differences in the cost per trip by mode are shown below in Figure 7. Urban and Tourism had a cost per trip that was lower than the statewide average. Volunteer driver also has a lower cost per trip, but this is because only administrative costs are included in this figure. Over the past year, the
cost per trip for rural and demand response decreased, while it increased for all other categories. In reviewing five-year trends, every service category except the Volunteer Driver administrative cost category saw an increase in its cost per trip.

**Figure 7: Cost per Trip by Service Category in SFY 2018**

![Cost per Trip by Service Category in SFY 2018](image)

**Local Share**

The Public Transit Section also examines the transit providers’ performance in generating local revenue. The Vermont Public Transit Policy Plan establishes a statewide goal that 20% of the funds for public transportation should be generated locally. This is a broad interpretation of local funding to include fare revenue, contributions from individuals, contracts with outside agencies, and payments from cities and towns. In other words, local share refers to the percentage of transit expenses that are not covered by the Federal Transit Administration, the Federal Highway Administration, or the state (and excludes state funding for capital, Rideshare, RTAP, JARC, and Medicaid).

Figure 8 displays the local share of transit operating budgets statewide in SFY 2018, based on actual operating expenses from VTrans’ grant tracking spreadsheets. The local share analysis found that 24% of transit funding statewide comes from local sources including fares. Excluding GMT-Urban, the largest generator of fare revenue, the local share of transit budgets outside of Chittenden County was under the 20% target, dropping from 20% in SFY 2017 to 17% in SFY 2018.

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2 The federal definition of local match for FTA funds removes fare revenue from the calculation and includes state operating assistance.
The available resources and partnerships that transit providers rely on for public transportation funding vary widely and include municipal contributions, business sponsors, institutional partners, contracts with human service agencies, in-kind match from volunteer driver programs, advertising, donations, and fares. VTrans provides flexibility to the transit providers in using various sources of local revenue to complement state and federal funding.

Figure 9 illustrates the local share percentage by transit system in SFY 2018, in comparison with the state’s 20% goal. Local share was calculated as total non-state and non-federal funding divided by total operating expense. Advance Transit and GMT-Urban exceeded the 20% local share target. The local share for the other transit systems ranged from 13% to 18%.
Elders and Persons with Disabilities (E&D) Transportation Program

FTA’s §5310 program is targeted toward seniors (people 60 and older) and people with disabilities. The E&D Program, as it is commonly known, is used in most parts of the country to finance the purchase of accessible vans and buses. In Vermont the scope of the E&D Program has been expanded to include the funding of operations by incorporating funds from the §5311 (non-urban) program.

In SFY 2018 the total amount spent on the E&D Program in Vermont was $4.97 million, 80% of which ($3.94 million) was federal money. This funding provided 183,449 rides, for an average cost per passenger trip of $27.09.

Trips funded through the E&D Program are provided across many modes as shown in Figure 10. In SFY 2018 18% of E&D trips were provided on regular bus routes, 38% in vans, 2% in taxicabs and, most importantly, 40% in private cars operated by volunteer drivers. These figures represent a slight shift from volunteer driver to buses compared to last year. Also, sedans, which are cheaper to operate than vans, but still have a professional driver, accounted for 2% of the trips, up from a tiny fraction in SFY 2017.

Over the past decade, the transit providers, which also serve as E&D brokers, have increasingly used volunteer drivers to transport riders under the E&D Program. SFY 16 was the first year that more E&D trips were provided through volunteer drivers than by vans and this continued to be true in SFY 2018. Volunteer driver trips cost less per passenger trip and can provide a more personalized service to seniors and persons with disabilities, some of whom are traveling long distances (including to neighboring states) for medical services and other needs. Volunteer drivers are especially important to mobility in large rural areas, where the population is thinly distributed, such as the Northeast Kingdom.
Figure 11 displays the percentages of E&D trips by trip purpose in SFY 2018. Some 36% of E&D trips transport people to medical appointments and critical care services such as dialysis and cancer treatments. Thirty-seven percent of E&D trips are used to access adult day programs and senior meals. Over the past year, the portion of E&D trips for social/personal trips decreased slightly, while the percentage of shopping and vocational trips stayed about the same.

**Figure 11: E&D Trips by Purpose in SFY 2018**

- Unknown: 1%
- Critical Care (Dialysis/Cancer Treatment): 9%
- Non-Medicaid Medical: 27%
- Social/Personal: 15%
- Vocational: 2%
- Shopping: 9%
- Adult Day Programs/Senior Centers: 27%
- Senior Meals Programs: 10%

**COUNTY-LEVEL STATISTICS**

Since SFY 2017, the percentage of public transit trips that originated in Chittenden County decreased by 3% so that now it accounts for slightly under half of the transit trips statewide (though GMT-Urban still accounts for half of all trips, as it serves three surrounding counties). Rutland County had the second largest share of public transit trip origins (15%) followed by Windham County (9%). Less than 1% of trips originated in Grand Isle County and Essex County. The breakdown of public transit trips by county of origin in SFY 2018 is presented in Figure 12.

**Figure 12: Public Transit Trips by County of Origin in SFY 2018**

- Chittenden: 47%
- Rutland: 15%
- Orange: 7%
- Grand Isle: 0%
- Franklin: 0%
- Essex: 1%
- Lamoille: 3%
- Orleans: 1%
- Bennington: 5%
- Windham: 9%
- Washington: 7%
- Caledonia: 2%
ROUTE-LEVEL PERFORMANCE

The Public Transit Section evaluates Vermont’s transit services by their productivity and cost-effectiveness. All transit services in the state are grouped by service category and evaluated against peer-based performance standards.

Methodology for Developing Performance Standards

National Transit Database (NTD) data (Report Year 2017) were used to develop performance benchmarks for all categories except for Intercity and Volunteer Driver. The standard for the Volunteer Driver category was based on Vermont averages. The performance standards for Intercity service were based on the performance metrics included in VTrans’ intercity bus program solicitation document. The performance thresholds for Vermont’s Tourism services incorporated both NTD data and data collected directly from selected Tourism peers.

In past years, the peer averages were updated by gathering new data from the NTD for the old sets of peers. For this report, all of the peer sets (other than Urban and Express Commuter) were reselected “from scratch” using comparisons of ridership, service and cost of transit providers from across the country to the Vermont providers. As a result, some of the standards changed more substantially from prior years.

The “Successful” standard for most service categories was the peer average. For the Volunteer Driver category, 80% of the Vermont average was considered the Successful standard, per guidelines in the Vermont Public Transit Policy Plan.

Table 1 summarizes the SFY 2018 performance standards for “Successful” services by category. The “Acceptable” standard was set at half the Successful threshold in measuring productivity, and twice the Successful threshold in measuring cost-effectiveness. The standards from SFY 2017 are shown for reference.

<table>
<thead>
<tr>
<th>Service Category</th>
<th>&quot;Successful&quot; Productivity Standard</th>
<th>&quot;Successful&quot; Cost-Effectiveness Standard (cost/passenger)¹</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>2018</td>
<td>2017</td>
</tr>
<tr>
<td>Urban</td>
<td>1.74 boardings/mile</td>
<td>1.95 boardings/mile</td>
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<tr>
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<td>$5.14</td>
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<td>Small Town</td>
<td>8.94 boardings/hour</td>
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<tr>
<td></td>
<td>$9.02</td>
<td>$8.13</td>
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<tr>
<td>Demand Response</td>
<td>2.66 boardings/hour</td>
<td>3.74 boardings/hour</td>
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<td></td>
<td>$19.15</td>
<td>$15.79</td>
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<tr>
<td>Tourism</td>
<td>13.87 boardings/hour</td>
<td>14.55 boardings/hour</td>
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<tr>
<td></td>
<td>$6.27</td>
<td>$5.82</td>
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<tr>
<td>Rural</td>
<td>6.29 boardings/hour</td>
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<td>$13.56</td>
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<td>Rural Commuter</td>
<td>5.73 boardings/hour</td>
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<td>$19.85</td>
<td>$18.06</td>
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<td>Express Commuter</td>
<td>17.76 boardings/trip</td>
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<td></td>
<td>$12.07</td>
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<td>Volunteer Driver</td>
<td>n/a</td>
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<tr>
<td></td>
<td>$3.41</td>
<td>$3.78</td>
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<tr>
<td>Intercity</td>
<td>3.28 boardings/trip</td>
<td>3.28 boardings/trip</td>
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<tr>
<td></td>
<td>$30.00</td>
<td>$30.00</td>
</tr>
</tbody>
</table>

¹ Except Intercity standard is subsidy per passenger-trip (net of fare revenue)
Route Evaluation Results

Overall, in SFY 2018, Vermont’s transit services met the performance standards set by peer systems. The vast majority (85%) of the 118 transit services evaluated across the state met the Acceptable standards for both productivity and cost-effectiveness. Forty percent of the state’s transit routes were considered Successful in both measures compared to their peers.

The Tourism category had the highest rate of success with over 60% of its services meeting both Successful standards. The Rural Commuter and Small Town categories performed relatively well, with over 40% of their services meeting the Successful standards for both productivity and cost-effectiveness.

Improved Transit Routes

Four routes moved from underperforming to acceptable performance in productivity and/or cost-effectiveness since SFY 2017:

- In the Small Town category, SEVT’s Springfield In-Town service improved to meet the acceptable threshold for productivity, after a route restructuring effort.
- In the Rural Category, SEVT’s Bellows Falls In-Town service also improved its productivity after a service restructuring.
- In the Demand Response Category, TVT’s Shopper and Maxi-Taxi services in Randolph improved markedly, with productivity increasing by more than 50%.

Underperforming Transit Services

Statewide, 18 transit services did not meet the Acceptable thresholds for productivity, cost-effectiveness, or both measures. Eight of these services underperformed for the first time:

- GMT-Urban: Middlebury LINK
- GMT-Rural: Capital Shuttle
- GMT-Rural: Volunteer Driver Admin Cost
- RCT: Demand Response
- SEVT: Okemo Seasonal
- SEVT: Demand Response (E&D)
- TVT: Volunteer Driver Admin Cost
- Vermont Shires Connector

In past years, the Demand Response figures for RCT included E&D trips operated by volunteer drivers. In order to avoid double-counting these trips (which are also included in the Volunteer Driver category), such trips were excluded from RCT’s Demand Response figures for this year. Excluding the volunteer driver trips caused the cost per passenger for RCT to rise significantly. Van and taxi trips, which comprise the bulk of the service in this category, are expensive to operate in the Northeast Kingdom due to the very large geographic territory RCT covers.
Most of these services underperformed because of decreasing ridership. The RCT Demand Response service saw an increase in the cost per passenger. SEVT’s Okemo Seasonal route has been near the thresholds in most years but managed acceptable performance in SFY 2017. The Vermont Shires Connector is a brand new service begun in September 2017, and so it is not surprising that its ridership market is not yet fully developed.

Table 2 lists the services that have been underperforming for at least two consecutive years. Nine of the routes have underperformed for three or more consecutive years. Three of the services were within 10% of the Acceptable standards for productivity and/or cost-effectiveness. Several routes improved but still fell under the Acceptable threshold for productivity and cost-effectiveness.

Table 2: Underperforming Services

<table>
<thead>
<tr>
<th>Service Category</th>
<th>Route</th>
<th>Years Underperformed in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban</td>
<td>GMT-Urban: Williston/Essex</td>
<td>3</td>
</tr>
<tr>
<td>Urban</td>
<td>GMT-Urban: Sunday Service</td>
<td>2</td>
</tr>
<tr>
<td>Rural</td>
<td>SEVT-The Current: Bellows Falls-Springfield</td>
<td>4</td>
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<td>Tourism</td>
<td>GMT-Rural: Valley Floor</td>
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<tr>
<td>Rural Commuter</td>
<td>TVT-Stagecoach: 89er North</td>
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</tr>
<tr>
<td>Rural Commuter</td>
<td>SEVT-The Current: Bellows Falls-Rutland</td>
<td>4</td>
</tr>
<tr>
<td>Rural Commuter</td>
<td>MVRTD: Bellows Falls-Rutland (Ludlow Rt.)</td>
<td>4</td>
</tr>
<tr>
<td>Rural Commuter</td>
<td>MVRTD: Fair Haven Expansion</td>
<td>2</td>
</tr>
<tr>
<td>Rural Commuter</td>
<td>RCT: Twin City (CMAQ Y2)</td>
<td>2</td>
</tr>
<tr>
<td>Express Commuter</td>
<td>TVT-Stagecoach: 89er</td>
<td>3</td>
</tr>
</tbody>
</table>

Performance Graphs

The next section of the report includes graphs depicting the performance data for all transit services in Vermont. Graphs 1–8 depict the SFY 2018 productivity data per service category, and Graphs 9–17 display the SFY 2018 cost-effectiveness data per service category. The standard for Successful services, equal to the peer average, is shown on each graph as a green line, while the standard for Acceptable services is shown as a red line. New transit services, or portions of existing services which are funded through the CMAQ Program, are distinguished by a diagonal line fill in the graphs. Each provider has a specific and consistent color used throughout all of the graphs. Appendix A includes the same performance data, for each route by service category, in a tabular format for easy reference.

Appendix B includes charts that portray historical ridership, total operating cost, and cost per trip by transit system/division from SFY 2014 through SFY 2018. Appendix C presents the historical performance for every route or service in Vermont from SFY 2014 through SFY 2018, showing the trends in productivity and cost-effectiveness.
PRODUCTIVITY PERFORMANCE
BY SERVICE CATEGORY
Graph #1: 2018 Urban Boardings per Mile
Note: Data for AT routes represent the entire route, even though a portion of the route is in New Hampshire.
Graph #3: 2018 Demand Response Boardings per Hour

Note: TVT-ACTR's demand response data includes 15,262 E&D eligible trips provided by Elderly Services, Inc. for free with vehicles leased from TVT-ACTR.
Graph #4: 2018 Tourism Boardings per Hour

*Privately funded operations; no state or federal funds
Graph #5: 2018 Rural Boardings per Hour

- Successful: 6.29
- Acceptable: 3.14
Graph #6: 2018 Rural Commuter Boardings per Hour

- Peer Average: 5.73
- Successful: 6.00
- Acceptable: 2.87

*Emerald Line
Graph #6: 2018 Rural Commuter Boardings per Hour (continued)

- MVRTD: Bellows Falls-Rutland
- MVRTD: Manchester Route [Rt. 7 South]
- MVRTD: Twin City [CMAQ Y2]
- SEVT-Current: Bellows Falls-Rutland
- SEVT-MOO: Readsboro-W. Wilmington
- SEVT-MOO: Bellows Falls-Rutland
- TVT-ACTR: 116 Commuter
- TVT-ACTR: Burlington Link Express [Sat.]
- TVT-ACTR: Rutland Connector
- TVT-Statecoach: 89er North

*Ludlow Route
Graph #7: 2018 Express Commuter Boardings per Trip

Note: The numbers at the bottom of the bars indicate the routes' FY 2018 average daily ridership.
Graph #8: 2018 Intercity Boardings per Trip

Performance Standard: 3.28
Greyhound: White River Junction-Springfield, MA: 1.64
Vermont Translines: Route 4: 2.00
Vermont Translines: Route 7: 4.00
Vermont Translines: Vermont Shires Connector: 0.00
COST-EFFECTIVENESS PERFORMANCE
BY SERVICE CATEGORY
Graph #9: 2018 Urban Cost per Passenger

- Peer Average: Successful, $5.14
- City Loop: Acceptable, $10.29
- College Street Shuttle: Successful, $5.14
- Essex Junction: Successful, $5.14
- Neighborhood Specials: Successful, $5.14
- North Avenue: Successful, $5.14
- Pine Street: Successful, $5.14
- Riverside/Winooski: Successful, $5.14
- Shelburne Road: Successful, $5.14
- Sunday Service: Successful, $5.14
- U Mall/Airport: Successful, $5.14
- Williston: Successful, $5.14
- Williston/Essex: $25.00
Note: Data for AT routes represent the entire route, even though a portion of the route is in New Hampshire.
Successful, $19.15

Acceptable, $38.30

Graph #11: 2018 Demand Response Cost per Passenger

Note: TVT’s E&D demand response data includes 15,262 E&D eligible trips provided by Elderly Services, Inc. for free with vehicles leased from TVT.
Graph #12: 2018 Tourism Cost per Passenger

Successful, $6.27
Acceptable, $12.54

*Privately funded operations; no state or federal funds
Successful, $13.56
Acceptable, $27.12

Graph #13: 2017 Rural Cost per Passenger
Graph #14: 2018 Rural Commuter Cost per Passenger

Peer Average: $15.85
Successful: $39.70
Acceptable: $40.00

GMCN: Bennington-Manchester (Orange)
GMCN: N. Benn.-So. VT College (Brown)
GMCN: Wilmington-Bennington*
GMT-Rural: Alburgh-Georgia
GMT-Rural: City Commuter
GMT-Rural: Northfield Commtr.
GMT-Rural: Richford-St. Albans
GMT-Rural: Route 100 Commuter
GMT-Rural: US 2 Commuter
GMT-Rural: Waterbury Commuter
GMT-Urban: 116 Commuter
GMT-Urban: Jeffersonville Commtr.

*Emerald Line
Graph #14: 2018 Rural Commuter Cost per Passenger (continued)

- Peer Average
- MVRTD: Bellows Falls-Rutland*
- MVRTD: Fair Haven Route (Rt. 4 West)
- MVRTD: Manchester Route (Rt. 7 South)
- RCT: Twin City (CMAQ Y2)
- RCT: US 2 Commuter
- SEVT-Current: Bellows Falls-Brattleboro
- SEVT-Current: Okemo Seasonal
- SEVT-MOOver: Readsboro-W. Wilmington
- SEVT-MOOver: Wilmington-West Dover
- SEVT-MOOver: Wilmington-Bennington
- TVT-ACTR: Burlington Link Express (Sat.)
- TVT-ACTR: Burlington Link Express (CMAQ)
- TVT-Stagecoach: 89er North

*Ludlow Route
Graph #15: 2018 Express Commuter Cost per Passenger

- Peer Average
- GMT-Urban: Middlebury LINK Express
- GMT-Urban: Milton Commuter
- GMT-Urban: Montpelier LINK Express
- SEVT-Current: DHMC Express Rt 71
- SEVT-Current: Dartmouth College Exp...
- SEVT-Current: VA Express Rt 74
- TVT-Stagecoach: 89er
- TVT-Stagecoach: River Route
Graph #16: 2018 Intercity Subsidy per Passenger

- Performance Standard
- Greyhound: White River Junction-Springfield, MA
- Vermont Translines: Route 4
- Vermont Translines: Route 7
- Vermont Translines: Vermont Shires Connector

Showing Subsidy Costs:
- $0.00
- $20.00
- $40.00
- $60.00
- $80.00
- $100.00
- $120.00
- $140.00
- $160.00

Performance Standards:
- Successful, $30.00
- Acceptable, $60.00
Graph #17: 2018 Administrative Cost per Volunteer Trip

VT Average: $3.41
GMCN: $3.41
GMT-Rural: $7.00
GMT-SSTA: $7.00
MVRTD: $1.00
RCT: $6.82
SEVT: $0.00
TVT: $0.00
VABVI: $0.00

Acceptable, $6.82
Successful, $3.41