Market Analysis

Rapid Central Texas Population Growth

- **Seniors** – Increasing quickly, especially in the suburbs
- **College** – Enrollment increasing, while percentage of overall Travis County population will decline
- **Low-Income** –
  - One in six Travis County residents is low-income
  - Relocating to affordable areas outside of the urban core
- **Minority** – Travis County will become minority-majority by 2025

Dramatic Decrease in Unemployment
Market Analysis

Land Use Market Types

- **Central Core**
  - Lifestyle Mobility
  - Walkable
  - Bikeable
  - High density
  - Mixed-use

- **Core**
  - Lifestyle Mobility
  - Walkable
  - Bikeable
  - Medium density
  - Mixed-use

- **Suburban**
  - Targeted Mobility
  - Auto-centric
  - Low density
  - Separate residential and shopping

- **Rural**
  - Targeted Mobility
  - Auto-centric
  - Very low density
  - Primarily residential

Land Use Challenges for Transit

- Central Texas contains a mix of land use types: dense urban, auto-centric suburban & low density rural
- Housing connectivity to jobs and schools:
  - Affordable housing becoming more disconnected
  - Long work commutes pressure the transportation system
- Need for integrated network of streets, bike paths, and sidewalks
Market Analysis

- Transit commuting in Austin higher than peer cities (Dallas & San Antonio)
- Community and regional commute equally important for Austin workers
- Bi-directional demand between Austin and suburbs
- Transit key to mitigating increases in commute congestion with population increase of 20-29% by 2025 and 45-80% by 2040

Travel Patterns

- Total Jobs in Austin are held by Austin City Residents
- Austin resident’s average drive time to work
Market Analysis

Strengths
- Regional Growth
- Concentrated Development
- Student Demographic
- City Initiatives

Weaknesses
- Auto-Centric Development
- Low Gas Prices
- Emerging Employment Centers Outside Core
- Affordability in Austin
Service Analysis

Operating Cost & Ridership

Revenue Hours and Operating Cost

- Year
- Revenue Hours
- Operating Cost
- 2000
- 2002
- 2004
- 2006
- 2008
- 2010
- 2012
- 2014

Annual Ridership

- Annual Ridership (Millions)
- 2002
- 2004
- 2006
- 2008
- 2010
- 2012
- 2014

2010 POPULATION & EMPLOYMENT DENSITY

WEEKDAY RIDERSHIP
Service Analysis

**Productivity and Fares**

**Fares**

<table>
<thead>
<tr>
<th>Year</th>
<th>Local</th>
<th>Premium</th>
<th>Commuter</th>
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<tbody>
<tr>
<td>1985</td>
<td>$0.50</td>
<td>-</td>
<td>$1.00</td>
</tr>
<tr>
<td>1990</td>
<td>Free</td>
<td>-</td>
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<tr>
<td>1991</td>
<td>$0.50</td>
<td>-</td>
<td>$1.00</td>
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<tr>
<td>2008</td>
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<td>$1.50</td>
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<tr>
<td>2010</td>
<td>$1.00</td>
<td>-</td>
<td>$2.50</td>
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<tr>
<td>2014</td>
<td>$1.00</td>
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</tr>
<tr>
<td>2015</td>
<td>$1.25</td>
<td>$1.75</td>
<td>$3.50</td>
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</tbody>
</table>

- Historic base fares have been low
- Daily and Monthly Passes are priced at lower multiples than typical practice
- The portion of operating costs paid by fares is 10%
Service Analysis

- MetroRapid operates 10-15% faster than Local
  - Typical bus rapid transit 20-30% faster¹
- MetroRapid Premium fares and tiered pass structure incentivize riders to choose Local service

<table>
<thead>
<tr>
<th>LOCAL</th>
<th></th>
<th>PREMIUM</th>
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<tbody>
<tr>
<td>Single Ride</td>
<td>$1.25</td>
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<td>Day Pass</td>
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<td>31-Day Pass, Reduced</td>
<td>$20.60</td>
<td>31-Day Pass, Reduced</td>
<td>$31.00</td>
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¹FTA Research, Peer-to-Peer Information Exchange on BRT and Bus Priority Best Practices
Service Analysis

**Findings**

**Strengths**
- EXISTING FREQUENT NETWORK
- TAILORED SERVICES
- MIXED USE CORRIDORS
- FACILITIES

**Weaknesses**
- LIMITED FREQUENT SERVICE
- LOW FAREBOX RECOVERY
- FARE STRUCTURE
- LIMITED NETWORK SYNERGY
Next Steps

• Join us to discuss draft plan recommendations in September 2016

• Visit Connections2025.org:
  • Get project updates
  • Sign up for emails
  • Read our blog
  • Learn about upcoming events

• Have an idea or a question?
  Email Feedback@Connections2025.org or call 512-369-6000

Thank you for your participation!