



IMPACT OF ECONOMIC CONDITIONS ON PUBLIC TRANSPORTATION PERFORMANCE

INTRODUCTION

The American Public Transportation Association (APTA) conducted its third survey of the impact of economic conditions on transit performance and finance during March and April 2005. The survey was structured to be comparable to the first two surveys conducted during August 2002 and July 2003. Survey responses were received from 140 APTA United States transit system members.

Each participating system was asked their experience during 2004 compared to 2003 and expectations for 2005 compared to 2004 in 21 different measures of economic conditions and their responses to those economic conditions. The systems were asked if they had experienced increases, stayed about the same, or seen decreases for those questions. They were not asked to quantify the amount of change they had experienced.

PRINCIPAL FINDINGS

The majority of transit systems have experienced an improved economic environment during 2004 and anticipate continued improvement during 2005. Fewer systems will need to take actions to increase revenues, cut service, or cut costs than in previous years. Some transit systems, however, continue to experience negative economic conditions which require them to restrict service and cut costs to meet budget constraints.

- *Most transit systems have growing or stable ridership.* Nearly 70 percent of transit systems had stable or growing ridership in 2004, and 90 percent expect ridership to grow or remain the same in 2005. This is a significant turn-around from 2003 when only 43 percent and 2002 when only 36 percent of transit systems experienced ridership increases.
- *More transit systems see state and local tax revenue growth.* Fifty-nine percent of transit systems with dedicated taxes saw those tax revenues rise in 2004 while 32 percent had stable dedicated tax revenues, and 9 percent had declining dedicated tax revenue.

State and local government tax revenues only increased for 34 percent of transit systems while those revenues were stable for 40 percent of transit systems and declined for 26 percent during 2004.

- *Most transit systems face stable or growing operating budget deficits.* Only 16 percent of transit systems had decreases in their operating budget deficits in 2004, 26 percent had the same level of deficit and 58 percent had increased operating budget deficits.
- *Fewer, but still a large portion of, transit systems continue to further cut administrative costs.* Fifty-eight percent of transit systems cut administrative costs during 2004 compared to 73 percent that cut administrative costs during 2003. Forty-nine percent of transit systems anticipate further cuts to administrative costs during 2005.

Sixteen percent of transit systems deferred maintenance, and 56 percent delayed capital projects in 2004 compared to 22 percent that deferred maintenance and 60 percent that delayed capital projects in 2003.

- *Transit systems continue to exercise restraint in employee growth.* Thirty-four percent of transit systems reduced staffs in 2004 compared to 51 percent in 2003. Thirty-three percent of transit systems froze hiring in 2004 compared to 56 percent in 2003. Although the same percentage of transit systems, 33 percent, anticipated freezing staffs in 2005, only 24 percent of transit systems anticipate reducing staff in 2005.
- *Fewer transit systems took action to increase fares.* Only 34 percent of transit systems increased fares in 2004 compared to 46 percent in 2003 although 38 percent of transit systems anticipate fare increases in 2005.
- *Fewer transit systems are taking actions that reduce the amount of transit service.* Fourteen percent of transit systems reduced fleet size in 2004, and 11 percent anticipate reductions in 2005, a decrease from 22 percent that reduced fleet size during 2004.

While 43 percent of transit systems had reduced service frequency in 2003, only 31 percent reduced service during 2004, and 27 percent anticipate reducing the frequency of service in 2005.

Fifty-two percent of transit systems, however, anticipate delaying introduction of new services during 2005, the same percentage that delayed new service introduction during 2004 and 2003.

- *Insurance premiums continue to rise for most transit systems.* Eighty-seven percent of transit systems report stable or growing property insurance premiums, and 92 percent report stable or growing liability insurance premiums in 2004. Further increases in premiums are anticipated in 2005.

METHODOLOGY

Questionnaires (see Appendix A) were completed by 140 APTA member transit systems. The questionnaires asked for management opinions about 8 questions concerning the "Impacts of Economic and Funding Conditions" (Impacts) and 13 questions concerning "Agency Responses to Negative Economic and Funding Conditions" (Responses). Respondents were asked to mark whether "Impacts" in the first 8 questions "Increased," stayed the "Same," or "Decreased" in 2004 compared to 2003 and the anticipated change for 2005. They were asked to mark the final 13 questions about "Responses" either "Yes" or "No" that an action occurred in 2004 or was anticipated for 2005.

These questions had been asked in surveys conducted in 2003 and 2002, except that in these earlier surveys the first 8 "Impact" questions could only be marked "Increase" or "Decrease." Respondents were not asked to provide percentage changes, and the years requested were calendar years, but fiscal year data was accepted upon request.

Data from both the 2003 and 2002 surveys can be found in *Impact of the National Economic Slowdown on Public Transportation*, American Public Transportation Association, December 2003, at <http://www.apta.com/research/info/online/econimpactsurvey.cfm> or <http://www.apta.com/research/info/online/documents/impact2003rprtbillm.pdf>.

DETAILED FINDINGS

Ridership:

Ridership increased in 2004 and is expected to increase further in 2005. Fifty-nine percent of responding transit agencies experienced peak period ridership increases during 2004, and 71 percent anticipate ridership increases in 2005. Transit agencies have also experienced increased off-peak ridership

with 57 percent reporting increased off-peak ridership during 2004 and 69 percent anticipating increased ridership during 2005. See Figures 1 and 2 and Table 1.

Figure 1: Change in Ridership During Peak Hours

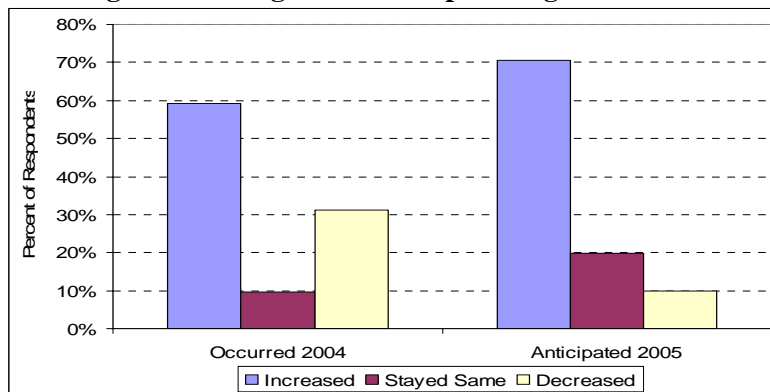
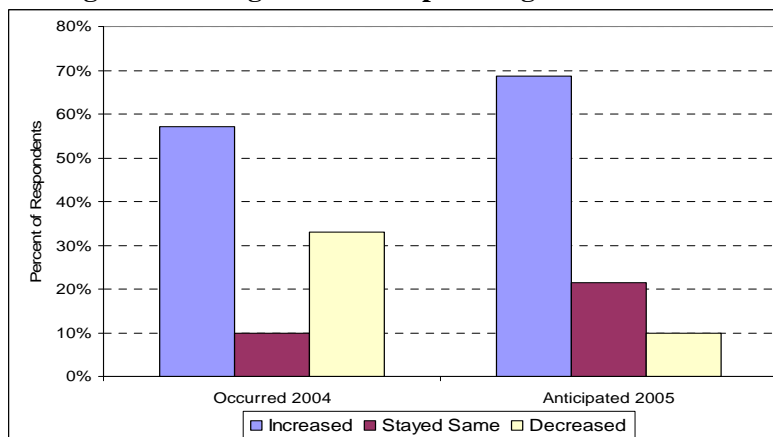


Figure 2: Change in Ridership During Off-Peak Hours



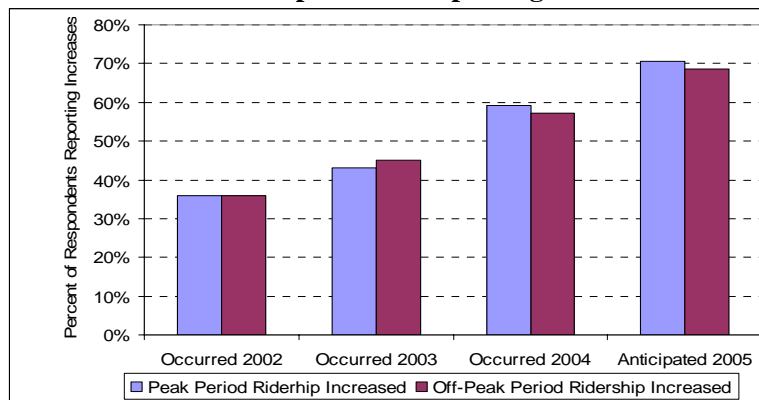
Growth in ridership reverses declines reported for 2002 and 2003. The growth in ridership is a reversal of declines reported in the 2002 and 2003 surveys. In each of those years less than one-half of respondents reported ridership increases. Systems reporting declines in peak period ridership have dropped from 64 percent in 2002 to an anticipated 10 percent in 2005; systems reporting declines in off-peak period ridership have also dropped from 64 percent in 2002 to an anticipated 10 percent in 2005.

Table 1: Trend in Ridership

	Ridership During Peak Hours, Percent of Respondents			Ridership During Off-Peak Hours, Percent of Respondents		
	Increase	Same	Decrease	Increase	Same	Decrease
Anticipated 2005	71 %	20 %	10 %	69 %	21 %	10 %
Occurred 2004	59 %	10 %	31 %	57 %	10 %	33 %
Occurred 2003	43 %	---	57 %	45 %	---	55 %
Occurred 2002	36 %	---	64 %	46 %	---	64 %

The increase in the portion of respondents reporting ridership increases is consistent with APTA *Transit Ridership Report*, which estimates changes in transit ridership nationwide. National ridership declined 1.26 percent in 2002 and 2.04 percent in 2003, but to have increased 2.11 percent in 2004. This is the same pattern as shown in this survey. See Table 1 and Figure 3.

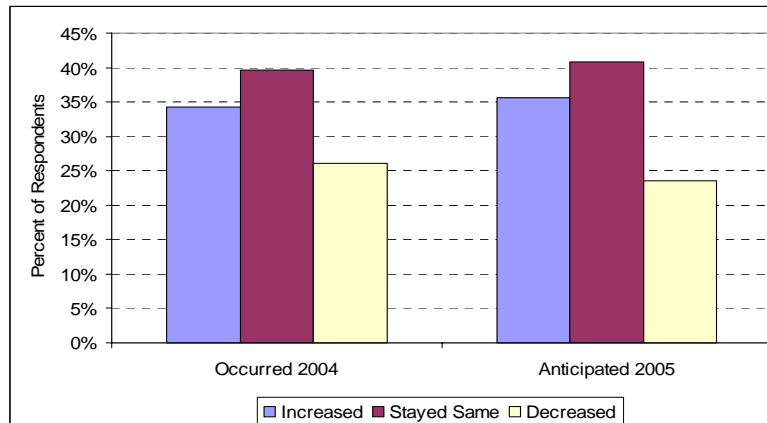
Figure 3: Trend of Ridership
Percent of Respondents Reporting Increases



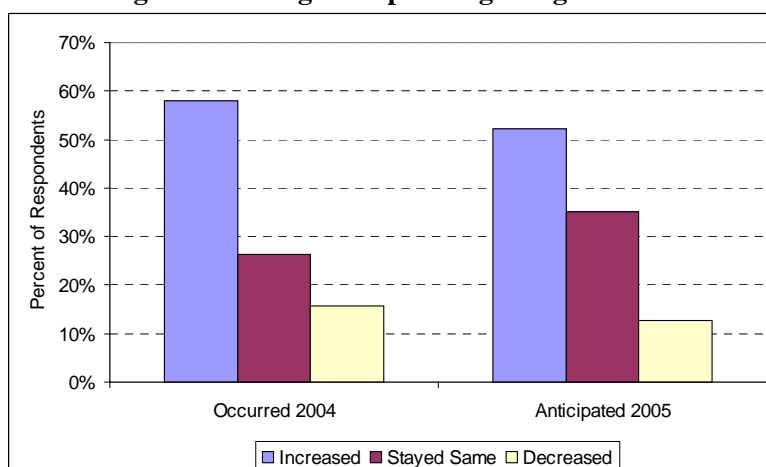
Revenues and Deficits:

Transit systems reported improvement in revenues from state and local funding sources but continued growth in operating budget deficits. Fifty-nine percent of respondents experienced increased income from dedicated taxes, and 32 percent saw dedicated taxes remain the same in 2004. Thirty-four percent of transit systems had increased state and local government funding, and 40 percent had the same level of state and local government funding in 2004. Respondents also anticipate increases in funds from both sources in 2005. See Figure 4 and Table 2.

Figure 4: Change in State and Local Government Funding



Despite the increase in dedicated tax revenues and state and local government funding, 58 percent of transit systems had increased operating budget deficits in 2004, and only 16 percent had decreased deficits. The outlook for 2005 is not much better – 52 percent of transit systems anticipate increases in operating budget deficits, and only 13 percent anticipate decreases. See Figure 5 and Table 2.

Figure 5: Change in Operating Budget Deficit

The trend in revenues and operating budget deficits is difficult to define because respondents had the new option beginning in 2004 of reporting that their experience stayed the same. The portion of respondents reporting increased income from dedicated taxes increased slightly from earlier surveys, but because many transit systems reported that income from dedicated taxes stayed the same, the percent that reported decreased income dropped significantly. For state and local government funding, the percent of transit systems experiencing increases in funding and the percent experiencing decreases both dropped, with the largest portion of respondents indicating state and local government funding stayed the same.

Table 2: Trend in Revenues and Operating Budget Deficit

	Income from Dedicated Taxes, Percent of Respondents			State and Local Government Funding, Percent of Respondents		
	Increase	Same	Decrease	Increase	Same	Decrease
Anticipated 2005	66 %	29 %	6 %	36 %	41 %	24 %
Occurred 2004	59 %	32 %	9 %	34 %	40 %	26 %
Occurred 2003	58 %	---	42 %	44 %	---	56 %
Occurred 2002	55 %	---	45 %	46 %	---	54 %
	Non-operating Revenues, Percent of Respondents			Operating Budget Deficit, Percent of Respondents		
	Increase	Same	Decrease	Increase	Same	Decrease
Anticipated 2005	35 %	50 %	14 %	52 %	35 %	13 %
Occurred 2004	36 %	40 %	24 %	58 %	26 %	16 %
Occurred 2003	55 %	---	45 %	54 %	---	46 %
Occurred 2002	53 %	---	47 %	51 %	---	49 %

The same trend was reported for non-operating revenues. A different trend was reported, however, for operating budget deficits. There was a small percentage increase in transit systems reporting operating deficit increases, from 54 percent in 2003 to 58 percent in 2004. Because 26 percent of transit systems reported operating budget deficits stayed the same in 2005, the percentage reporting a decrease in the operating budget deficit dropped from 49 percent in 2002 to 46 percent in 2003 to 16 percent in 2004 and is anticipated to drop further to 13 percent in 2005. These data indicate that constrained operating budget is a problem throughout the transit industry. See Table 2.

Actions to Cut Expenditures:

The percentage of respondents taking actions to cut expenditures dropped in 2004 and is anticipated to drop further in 2005. Fifty-eight percent of transit systems cut administrative expenses in 2004, and 49 percent anticipate cutting administrative expenses in 2005. Sixteen percent of respondents deferred maintenance in

2004, but 19 percent anticipate deferring maintenance in 2005. Sixty percent of transit systems deferred maintenance in 2004, and 56 percent anticipate deferring maintenance in 2005. See Figure 6 and Table 3.

Figure 6: Percent of Respondents Taking Actions to Cut Expenditures

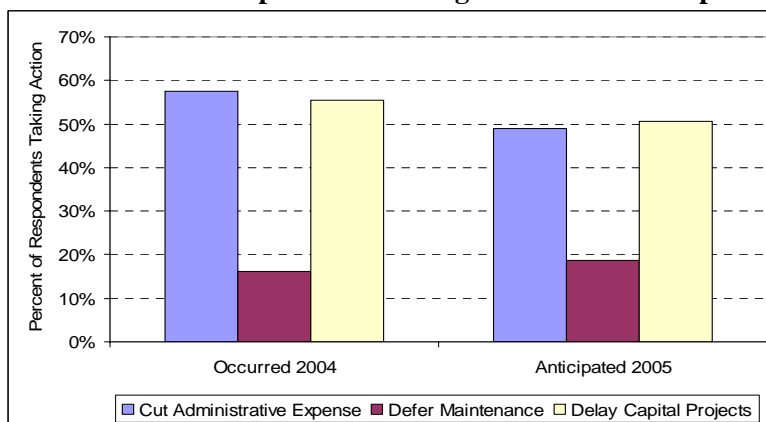
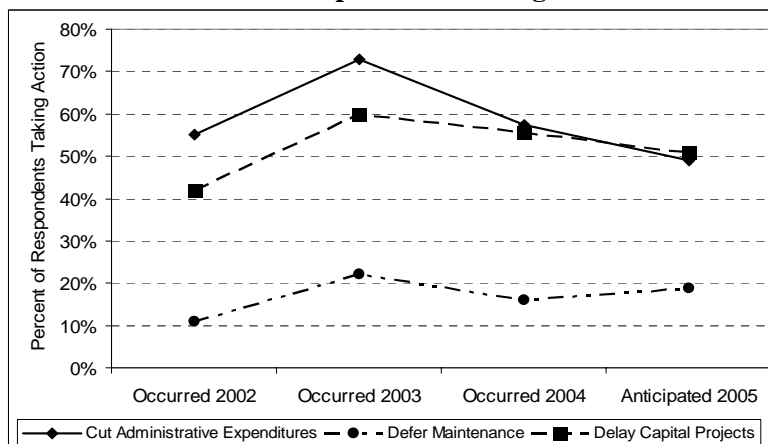


Table 3: Trend in Actions to Cut Expenditures

	Cut Administrative Expenses, Percent of Respondents		Defer Maintenance, Percent of Respondents		Delay Capital Projects, Percent of Respondents	
	Yes	No	Yes	No	Yes	No
Anticipated 2005	49 %	51 %	19 %	81 %	51 %	49 %
Occurred 2004	58 %	42 %	16 %	84 %	56 %	45 %
Occurred 2003	73 %	27 %	22 %	78 %	60 %	40 %
Occurred 2002	55 %	45 %	11 %	89 %	42 %	58 %

Efforts to cut expenditures using the methods in this group of questions have declined only slightly since 2003 after increasing between 2002 and 2003. Fifty-five percent of respondents were taking actions to cut administrative expenses in 2002 and 73 percent in 2003 compared to 58 percent in 2004. Eleven percent of transit systems deferred non-safety critical maintenance in 2002 and 22 percent in 2003 compared to 16 percent in 2005. Deferred maintenance is limited in scope because regulations and agency policies require full maintenance of any systems related to safety. Forty-two percent of respondents delayed capital projects in 2002 compared to 60 percent in 2003 and 56 percent in 2004. See Table 3 and Figure 7.

**Figure 7: Trend of Actions to Cut Expenditures
Percent of Respondents Taking Action**



Actions to Reduce Staffing:

Fewer transit systems took actions to cut cost by staff reductions in 2004 compared to earlier years. Thirty-four percent of transit systems reduced staff in 2004, and 24 percent anticipate reducing staff in 2005. This compares to 34 percent that reduced staff in 2002 and 51 percent that reduced staff in 2003. Once again, the percentage of respondents taking action peaked in 2003 having increased from 2002 but decreased in 2004.

Thirty-three percent of respondents froze hiring in 2004, and 33 percent anticipate freezing hiring in 2005. This compares to 36 percent of transit systems that froze hiring in 2002 and 56 percent that froze hiring in 2003, the same up and down trend for most questions involving actions in response to economic conditions. See Figures 8 and 9 and Table 4.

Figure 8: Percent of Respondents Taking Actions to Reduce Staffing

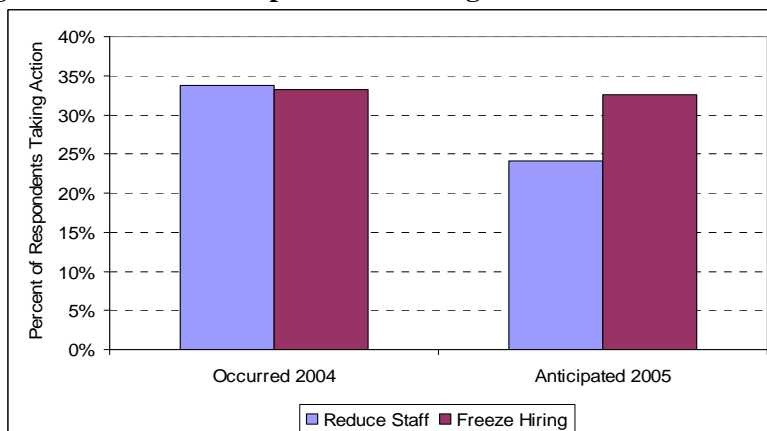
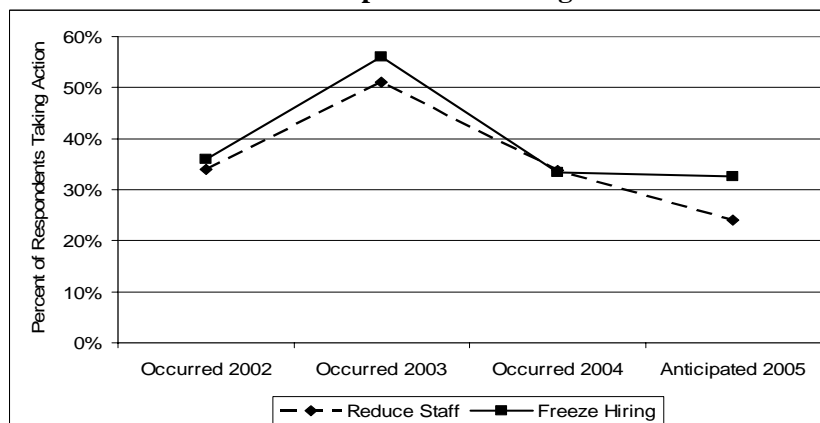


Table 4: Trend in Actions to Reduce Staffing

	Reduce Staff, Percent of Respondents		Freeze Hiring, Percent of Respondents	
	Yes	No	Yes	No
Anticipated 2005	24 %	76 %	33 %	67 %
Occurred 2004	34 %	66 %	33 %	67 %
Occurred 2003	51 %	49 %	56 %	44 %
Occurred 2002	34 %	66 %	36 %	64 %

**Figure 9: Trend of Actions to Reduce Staffing
Percent of Respondents Taking Action**



Actions to Increase Revenues:

Respondents were asked if they had taken any of four different actions to increase revenues. Thirty-four percent reported that they had increased fares during 2004 as shown on Figure 10. Among other action to increase revenue, 50 percent reported that they had taken money from reserves, 10 percent reported that they had implemented transit tax ballot initiatives, and 31 percent reported increasing non-fare revenues. See Figure 11 and Table 5.

Figure 10: Percent of Respondents Increasing Fares

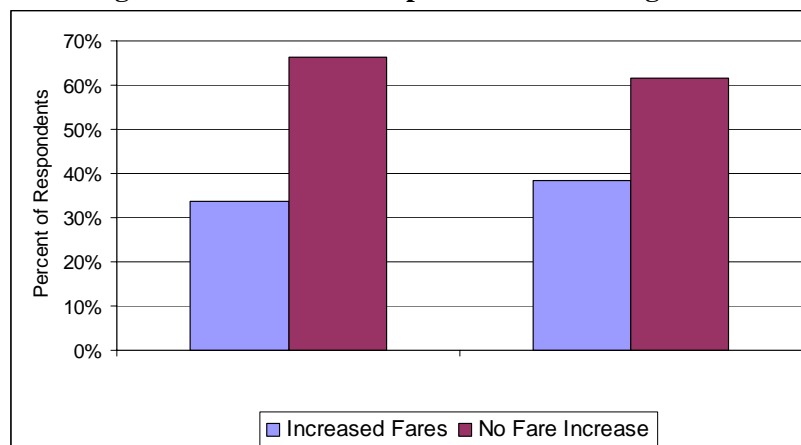
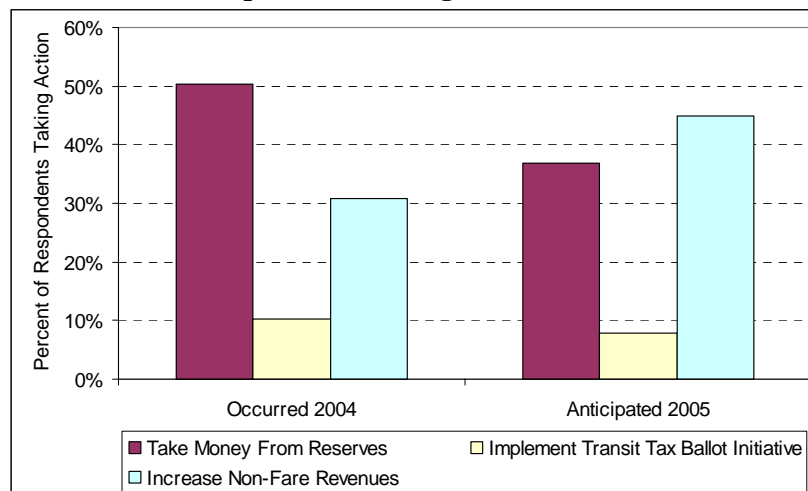


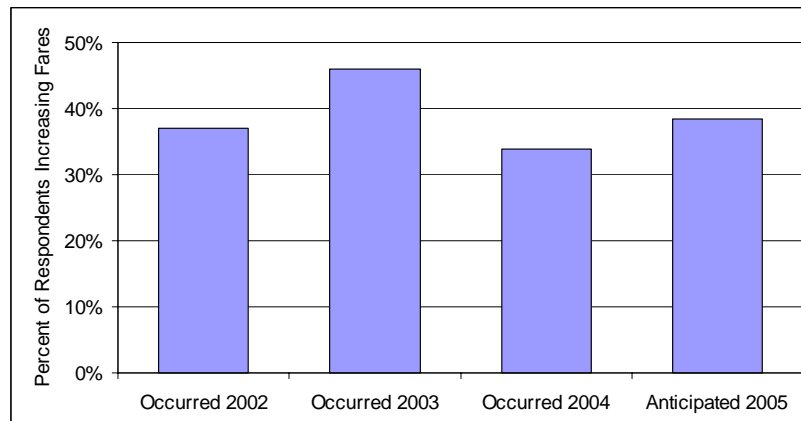
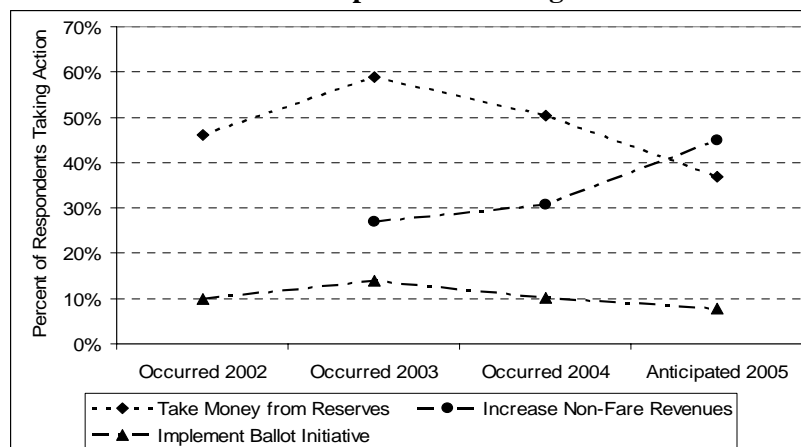
Figure 11: Percent of Respondents Taking Other Actions to Increase Revenues



These responses indicate a slight drop in actions to increase revenues. The percent of respondents increasing fares in 2002 was 37 percent, and in 2003 was 46 percent compared to 34 percent in 2004 as shown on Figure 12. The portion of transit systems taking money from reserves was slightly lower in 2004, 50 percent, compared to 2003 when it was 59 percent but was higher than the 46 percent of transit systems taking action in 2002. The percentage of respondents implementing transit tax ballot initiatives is consistently low, 10 percent in 2002 and 14 percent in 2003 compared to 10 percent in 2004. The percentage of transit systems increasing non-fare revenues is up slightly from 27 percent in 2003 to 31 percent in 2004. Change in non-fare revenue was not included in the 2002 survey. See Table 5 and Figure 13.

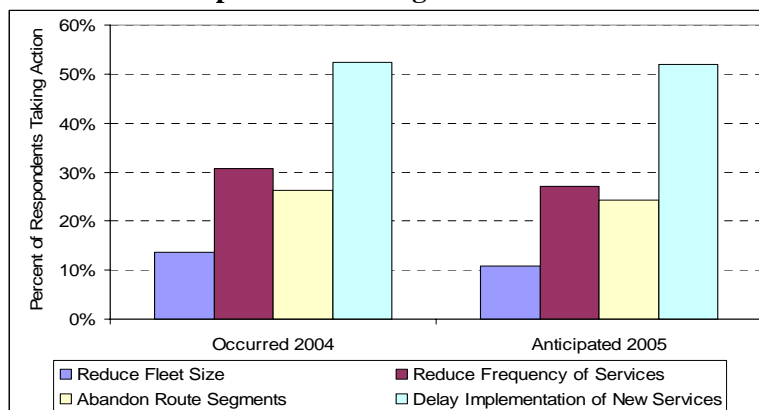
Table 5: Trend in Actions to Increase Revenues

	Increase Fares, Percent of Respondents		Take Money from Reserves, Percent of Respondents		Implement Transit Tax Ballot Initiative, Percent of Respondents		Increase Non-Fare Revenues, Percent of Respondents	
	Yes	No	Yes	No	Yes	No	Yes	No
Anticipated 2005	38 %	62 %	37 %	63 %	8 %	92 %	45 %	55 %
Occurred 2004	34 %	66 %	50 %	50 %	10 %	90 %	31 %	69 %
Occurred 2003	46 %	54 %	59 %	41 %	14 %	86 %	27 %	73 %
Occurred 2002	37 %	63 %	46 %	54 %	10 %	90 %	---	---

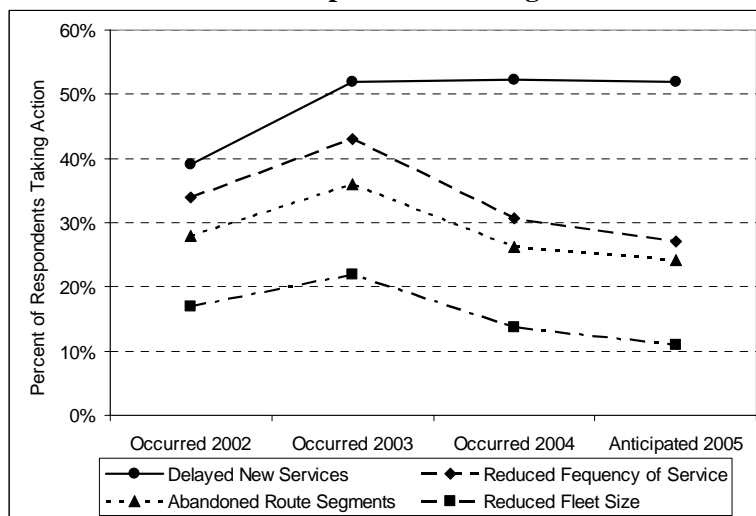
Figure 12: Trend of Respondents Increasing Fares**Figure 13: Trend of Other Actions to Increase Revenues
Percent of Respondents Taking Action**

Actions to Change Amount of Service Provided:

A smaller portion of transit systems took actions to cut cost by reducing service in 2004, and fewer expect to take such actions in 2005. Fourteen percent of transit systems reduced fleet size in 2004 and 11 percent anticipate reductions in 2005. Thirty-one percent of respondents reduced the frequency of transit service in 2004, and 27 percent expect reductions in 2005. Twenty-six percent of transit systems abandoned route segments in 2004, and 24 percent anticipate abandonments in 2005. Fifty-two percent of respondents delayed implementation of new services in 2004, and the same percentage anticipate delays of new service implementation in 2005. See Figure 14 and Table 6.

Figure 14: Percent of Respondents Taking Actions to Reduce Service Provision**Table 6: Trend in Actions to Change Amount of Service Provided**

	Reduce Fleet Size, Percent of Respondents		Reduce Frequency of Service, Percent of Respondents		Abandon Route Segments, Percent of Respondents		Delay Implementation of New Services, Percent of Respondents	
	Yes	No	Yes	No	Yes	No	Yes	No
Anticipated 2005	11 %	89 %	27 %	73 %	24 %	76 %	52 %	48 %
Occurred 2004	14 %	86 %	31 %	69 %	26 %	74 %	52 %	48 %
Occurred 2003	22 %	78 %	43 %	57 %	36 %	64 %	52 %	48 %
Occurred 2002	17 %	83 %	34 %	66 %	28 %	72 %	39 %	61 %

Figure 15: Trend of Actions Affecting Amount of Service Provided
Percent of Respondents Taking Action

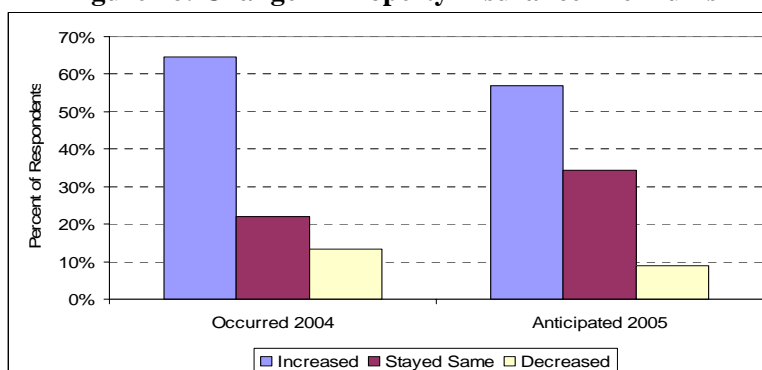
The percentage of transit systems taking actions to cut costs by reducing service dropped in 2004 compared to prior years in three categories after having risen in 2003 compared to 2002. While 14 percent of respondents reduced their fleet size in 2002, 22 percent had reduced fleet size in 2003 and 17 percent in 2004. Forty-three percent of transit systems had reduced service frequency in 2003 and 34 percent in 2002 compared to only 31 percent in 2004. Thirty-six percent of respondents had abandoned route segments in 2003 and 27 percent in 2002 compared to 26 percent in 2004. The only increase in this area was in the measure of delaying implementation of new service. Thirty-nine percent of respondents had delayed

implementation of new services in 2002 while 52 percent have delayed implementation of new service each year since then. See Table 6 and Figure 15.

Insurance Costs:

Premiums for both property insurance and liability insurance continued to rise. Property insurance premiums increases were reported by 65 percent of respondents, and only 13 percent reported declines. Fifty-seven percent of transit systems anticipate continued increases in property insurance premiums in 2005 while only 9 percent anticipate declines. See Figure 16 and Table 7.

Figure 16: Change in Property Insurance Premiums



Sixty-nine percent of respondents report increases in liability insurance during 2004, 23 percent report premiums stayed the same, and 8 percent report declines. For 2005, 69 percent of transit systems expect liability insurance premiums to increase, 26 percent expect them to stay the same, and 6 percent expect them to decline. See Figure 17 and Table 7.

Despite the high percentage of transit systems reporting insurance premium increases in 2004 and projecting increases in 2005, the percentage has dropped since 2003 when 76 percent of respondents experienced increases in property insurance premiums, and 84 percent experienced increases in liability insurance premiums. The percentage of systems reporting decreases in premiums in 2004 and anticipating decreases in 2005 has, however, plummeted. This is a result of the added option in this survey to report that premiums stayed the same rather than being required to select in prior surveys between reporting that premiums either increased or decreased. Because of this contradiction it is not possible to determine if the trend of insurance premium increases is up or down. See Table 7 and Figure 18.

Figure 17: Change in Liability Insurance Premiums

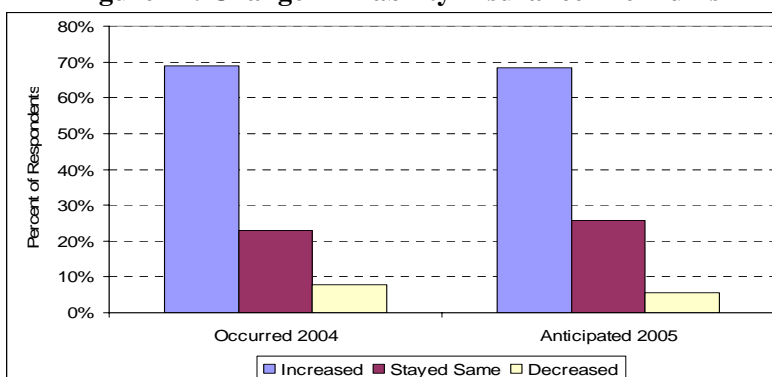
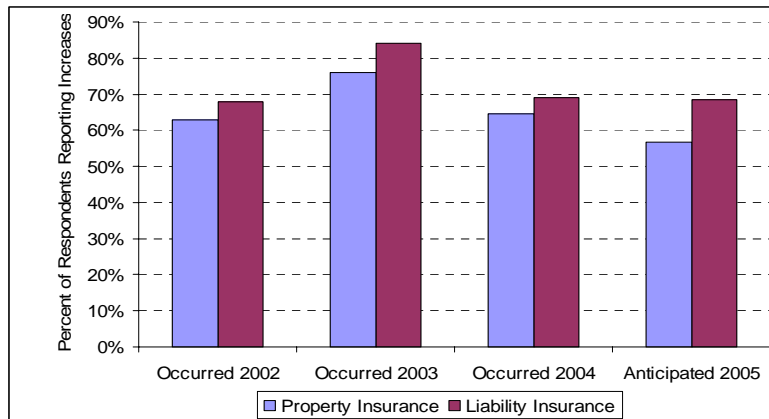


Table 7: Trend in Insurance Premiums

	Property Insurance Premiums, Percent of Respondents			Liability Insurance Premiums, Percent of Respondents		
	Increase	Same	Decrease	Increase	Same	Decrease
Anticipated 2005	57 %	34 %	9 %	69 %	26 %	6 %
Occurred 2004	65 %	22 %	13 %	69 %	23 %	8 %
Occurred 2003	76 %	---	24 %	84 %	---	16 %
Occurred 2002	63 %	---	37 %	68 %	---	32 %

**Figure 18: Trend in Insurance Premium Increases
Percent of Respondents Reporting Increases**



NATIONAL SUMMARY DATA: IMPACTS OF ECONOMIC AND FUNDING CONDITIONS

Table 8 summarizes on a single table data described in detail above. This table reports questions in part "A. Impacts of Economic and Funding Conditions" of the survey instrument, a copy of which is shown in Appendix A on page 23.

**Table 8: Trend of Impacts of Economic and Funding Conditions
Summary Data for All 140 Transit Agency Respondents**

	1. Ridership During Peak Hours			2. Ridership During Off-Peak Hours		
	Increase	Same	Decrease	Increase	Same	Decrease
Anticipated 2005	71%	20%	10%	69%	21%	10%
Occurred 2004	59%	10%	31%	57%	10%	33%
Occurred 2003	43%	---	57%	45%	---	55%
Occurred 2002	36%	---	64%	36%	---	64%
	3. Property Insurance Premiums			4. Liability Insurance Premiums		
	Increase	Same	Decrease	Increase	Same	Decrease
Anticipated 2005	57%	34%	9%	69%	26%	6%
Occurred 2004	65%	22%	13%	69%	23%	8%
Occurred 2003	76%	---	24%	84%	---	16%
Occurred 2002	63%	---	37%	68%	---	32%
	5. Income from Dedicated Taxes			6. State and Local Government Funding		
	Increase	Same	Decrease	Increase	Same	Decrease
Anticipated 2005	66%	29%	6%	36%	41%	24%
Occurred 2004	59%	32%	9%	34%	40%	26%
Occurred 2003	58%	---	42%	44%	---	56%
Occurred 2002	55%	---	45%	46%	---	54%
	7. Non-operating Revenues			8. Operating Budget Deficit		
	Increase	Same	Decrease	Increase	Same	Decrease
Anticipated 2005	35%	50%	14%	52%	35%	13%
Occurred 2004	36%	40%	24%	58%	26%	16%
Occurred 2003	55%	---	45%	54%	---	46%
Occurred 2002	53%	---	47%	51%	---	49%

NATIONAL SUMMARY DATA: TRANSIT AGENCY RESPONSE TO NEGATIVE ECONOMIC AND FUNDING CONDITIONS

Table 9 summarizes on a single table data described in detail above. This table reports questions in part "B. Agency Responses to Negative Economic and Funding Conditions" of the survey instrument, a copy of which is shown in Appendix A on page 23.

Table 9: Trend of Agency Response to Negative Economic and Funding Conditions
Summary Data for All 140 Transit Agency Respondents

	1. Increase Fares		2. Take Money from Reserves		3. Implement Transit Tax Ballot Initiative	
	Yes	No	Yes	No	Yes	No
Anticipated 2005	39%	62%	37%	63%	8%	92%
Occurred 2004	34%	66%	50%	50%	10%	90%
Occurred 2003	46%	54%	59%	41%	14%	86%
Occurred 2002	37%	63%	46%	54%	10%	90%
	4. Increase Non-fare Revenues		5. Reduce Fleet Size		6. Reduce Frequency of Services	
	Yes	No	Yes	No	Yes	No
Anticipated 2005	45%	55%	11%	89%	27%	73%
Occurred 2004	31%	69%	14%	86%	31%	69%
Occurred 2003	27%	73%	22%	78%	43%	57%
Occurred 2002	---	---	17%	83%	34%	66%
	7. Abandon Route Segments		8. Delay Implementation of New Services		9. Cut Administrative Expenses	
	Yes	No	Yes	No	Yes	No
Anticipated 2005	24%	76%	52%	48%	49%	51%
Occurred 2004	26%	74%	52%	48%	58%	43%
Occurred 2003	36%	64%	52%	48%	73%	27%
Occurred 2002	28%	72%	39%	61%	55%	45%
	10. Reduce Staff		11. Freeze Hiring		12. Defer Maintenance	
	Yes	No	Yes	No	Yes	No
Anticipated 2005	24%	76%	33%	67%	19%	81%
Occurred 2004	34%	66%	33%	67%	16%	84%
Occurred 2003	51%	49%	56%	44%	22%	78%
Occurred 2002	34%	66%	36%	64%	11%	89%
	13. Delay Capital Projects					
	Yes	No				
Anticipated 2005	51%	49%				
Occurred 2004	56%	45%				
Occurred 2003	60%	40%				
Occurred 2002	42%	58%				

VARIATION OF RESPONSES AMONG RESPONDENTS CATEGORIZED BY REGION AND AREA SIZE

Table 10 compares responses among transit system respondents grouped in categories based on the location of the state they are in and another grouping based on the size of the urbanized area or rural area they are located in. Responses are in the same order as questions on the survey instrument, a copy of which is shown in Appendix A on page 23.

The groupings by "Region" are:

Northeast and Mid-Atlantic: Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Virginia, and West Virginia.

Midwest and Plains: Colorado, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin.

Southeast and Gulf Coast: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas.

West: Alaska, Arizona, California, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming.

The groupings by "Area Size" are: Urbanized areas with 1,00,000 or more population; urbanized area with 200,000 to 999,000 population; and urbanized areas with fewer than 200,000 population and all rural areas outside of urbanized areas.

Cells that are shaded indicate values that are more than 10 percentage points higher or lower than the value for all respondents. The value for all respondents is listed in the "Total" column.

Table 10: Responses Compared by Region and Area Size
(Shaded Cells  Vary by More Than 10 Percentage Points from the "Total" Average Value)

Category	Total	Region				Area Size		
		Northeast and Mid-Atlantic	Midwest and Plains	Southeast and Gulf Coast	West	Over 1 Million	200,000 to 999,999	Less Than 200,000
Number of Respondents in Sample Group	140	29	35	34	42	60	53	27
Impacts of Economic and Funding Conditions								
1. Ridership During Peak Hours: Occurred During 2004								
Increase	59.3%	66.7%	57.1%	56.3%	58.5%	57.1%	59.6%	63.0%
Same	9.6%	11.1%	5.7%	15.6%	7.3%	8.9%	7.7%	14.8%
Decrease	31.1%	22.2%	37.1%	28.1%	34.1%	33.9%	32.7%	22.2%
Anticipated 2005								
Increase	70.5%	70.4%	67.6%	78.1%	66.7%	66.0%	73.1%	74.1%
Same	19.7%	25.9%	23.5%	12.5%	17.9%	18.9%	21.2%	18.5%
Decrease	9.8%	3.7%	8.8%	9.4%	15.4%	15.1%	5.8%	7.4%
2. Ridership During Off Peak Hours: Occurred During 2004								
Increase	57.1%	60.7%	60.6%	46.9%	60.0%	58.9%	56.9%	53.8%
Same	9.8%	10.7%	6.1%	15.6%	7.5%	10.7%	7.8%	11.5%
Decrease	33.1%	28.6%	33.3%	37.5%	32.5%	30.4%	35.3%	34.6%
Anticipated 2005								
Increase	68.7%	71.4%	68.8%	68.8%	66.7%	66.0%	69.2%	73.1%
Same	21.4%	28.6%	21.9%	18.8%	17.9%	20.8%	23.1%	19.2%
Decrease	9.9%	0.0%	9.4%	12.5%	15.4%	13.2%	7.7%	7.7%

(Shaded Cells  Vary by More Than 10 Percentage Points from the "Total" Average Value)

Category	Total	Region				Area Size		
		Northeast and Mid-Atlantic	Midwest and Plains	Southeast and Gulf Coast	West	Over 1 Million	200,000 to 999,999	Less Than 200,000
Number of Respondents in Sample Group	140	29	35	34	42	60	53	27
3. Property Insurance Premiums: Occurred During 2004								
Increase	64.6%	60.0%	59.4%	68.8%	68.4%	61.1%	70.0%	60.9%
Same	22.0%	24.0%	18.8%	25.0%	21.1%	20.4%	20.0%	30.4%
Decrease	13.4%	16.0%	21.9%	6.3%	10.5%	18.5%	10.0%	8.7%
Anticipated 2005								
Increase	56.8%	40.0%	60.0%	65.6%	57.9%	55.8%	56.0%	60.9%
Same	34.4%	56.0%	26.7%	28.1%	31.6%	32.7%	34.0%	39.1%
Decrease	8.8%	4.0%	13.3%	6.3%	10.5%	11.5%	10.0%	0.0%
4. Liability Insurance Premiums: Occurred During 2004								
Increase	69.0%	73.1%	56.7%	74.2%	71.8%	62.7%	72.5%	75.0%
Same	23.0%	23.1%	33.3%	16.1%	20.5%	21.6%	23.5%	25.0%
Decrease	7.9%	3.8%	10.0%	9.7%	7.7%	15.7%	3.9%	0.0%
Anticipated 2005								
Increase	68.5%	69.2%	57.1%	80.6%	66.7%	65.3%	68.6%	75.0%
Same	25.8%	30.8%	32.1%	12.9%	28.2%	26.5%	25.5%	25.0%
Decrease	5.6%	0.0%	10.7%	6.5%	5.1%	8.2%	5.9%	0.0%
5. Income from Dedicated Taxes: Occurred During 2004								
Increase	59.3%	50.0%	52.0%	57.9%	68.6%	70.5%	52.9%	38.5%
Same	31.9%	41.7%	36.0%	36.8%	22.9%	13.6%	44.1%	61.5%
Decrease	8.8%	8.3%	12.0%	5.3%	8.6%	15.9%	2.9%	0.0%
Anticipated 2005								
Increase	65.6%	33.3%	58.3%	75.0%	76.5%	74.4%	62.9%	41.7%
Same	28.9%	33.3%	41.7%	25.0%	20.6%	18.6%	31.4%	58.3%
Decrease	5.6%	33.3%	0.0%	0.0%	2.9%	7.0%	5.7%	0.0%
6. State and Local Government Funding: Occurred During 2004								
Increase	34.3%	40.7%	24.2%	45.5%	29.3%	45.5%	32.7%	14.8%
Same	39.6%	51.9%	27.3%	36.4%	43.9%	27.3%	44.2%	55.6%
Decrease	26.1%	7.4%	48.5%	18.2%	26.8%	27.3%	23.1%	29.6%
Anticipated 2005								
Increase	35.6%	51.9%	21.9%	39.4%	32.5%	37.0%	34.6%	34.6%
Same	40.9%	44.4%	31.3%	33.3%	52.5%	44.4%	38.5%	38.5%
Decrease	23.5%	3.7%	46.9%	27.3%	15.0%	18.5%	26.9%	26.9%
7. Non-operating Revenues: Occurred During 2004								
Increase	36.2%	42.3%	29.4%	45.2%	30.8%	46.3%	34.0%	19.2%
Same	40.0%	34.6%	44.1%	41.9%	38.5%	29.6%	42.0%	57.7%
Decrease	23.8%	23.1%	26.5%	12.9%	30.8%	24.1%	24.0%	23.1%
Anticipated 2005								
Increase	35.4%	36.5%	28.1%	40.0%	35.9%	49.1%	31.3%	15.4%
Same	50.4%	50.0%	56.3%	46.7%	48.7%	32.1%	58.3%	73.1%
Decrease	14.2%	11.5%	15.6%	13.3%	15.4%	18.9%	10.4%	11.5%
8. Operating Budget Deficit: Occurred During 2004								
Increase	57.9%	84.0%	61.3%	50.0%	40.6%	57.8%	58.7%	56.5%
Same	26.3%	12.0%	19.4%	23.1%	46.9%	26.7%	26.1%	26.1%
Decrease	15.8%	4.0%	19.4%	26.9%	12.5%	15.6%	15.2%	17.4%
Anticipated 2005								
Increase	52.3%	80.0%	46.4%	42.3%	43.8%	54.5%	48.9%	54.5%
Same	35.1%	16.0%	28.6%	42.3%	50.0%	31.8%	37.8%	36.4%
Decrease	12.6%	4.0%	25.0%	15.4%	6.3%	13.6%	13.3%	9.1%
Agency Responses to Negative Economic and Funding Conditions								
1. Increase Fares: Occurred During 2004								
Yes	33.8%	44.8%	34.3%	11.8%	43.9%	35.6%	28.3%	40.7%
No	66.2%	55.2%	65.7%	88.2%	56.1%	64.4%	71.7%	59.3%
Anticipated 2005								
Yes	38.5%	53.6%	27.3%	26.5%	47.5%	37.5%	37.7%	42.3%
No	61.5%	46.4%	72.7%	73.5%	52.5%	62.5%	62.3%	57.7%

(Shaded Cells  Vary by More Than 10 Percentage Points from the "Total" Average Value)

Category	Total	Region				Area Size		
		Northeast and Mid-Atlantic	Midwest and Plains	Southeast and Gulf Coast	West	Over 1 Million	200,000 to 999,999	Less Than 200,000
Number of Respondents in Sample Group	140	29	35	34	42	60	53	27
2. Take Money from Reserves: Occurred During 2004								
Yes	50.4%	56.0%	52.9%	52.9%	42.5%	43.1%	51.0%	65.4%
No	49.6%	44.0%	47.1%	47.1%	57.5%	56.9%	49.0%	34.6%
Anticipated 2005								
Yes	36.9%	41.7%	36.4%	24.2%	45.0%	36.8%	27.1%	56.0%
No	63.1%	58.3%	63.6%	75.8%	55.0%	63.2%	72.9%	44.0%
3. Implement Transit Tax Ballot Initiative: Occurred During 2004								
Yes	10.2%	0.0%	17.6%	13.3%	7.5%	9.3%	13.7%	4.3%
No	89.8%	100.0%	82.4%	86.7%	92.5%	90.7%	86.3%	95.7%
Anticipated 2005								
Yes	7.9%	0.0%	12.1%	0.0%	15.0%	5.6%	10.2%	8.7%
No	92.1%	100.0%	87.9%	100.0%	85.0%	94.4%	89.8%	91.3%
4. Increase Non-Fare Revenues: Occurred During 2004								
Yes	30.8%	29.6%	35.3%	33.3%	25.6%	35.7%	29.4%	21.7%
No	69.2%	70.4%	64.7%	66.7%	74.4%	64.3%	70.6%	78.3%
Anticipated 2005								
Yes	45.0%	29.6%	43.8%	40.0%	60.0%	52.6%	42.0%	31.8%
No	55.0%	70.4%	56.3%	60.0%	40.0%	47.4%	58.0%	68.2%
5. Reduce Fleet Size: Occurred During 2004								
Yes	13.7%	3.4%	22.9%	18.2%	9.5%	20.0%	11.3%	3.8%
No	86.3%	96.6%	77.1%	81.8%	90.5%	80.0%	88.7%	96.2%
Anticipated 2005								
Yes	10.9%	6.9%	8.8%	15.2%	11.9%	13.6%	9.4%	7.7%
No	89.1%	93.1%	91.2%	84.8%	88.1%	86.4%	90.6%	92.3%
6. Reduce Frequency of Services: Occurred During 2004								
Yes	30.7%	25.0%	38.2%	36.4%	23.8%	28.8%	34.6%	26.9%
No	69.3%	75.0%	61.8%	63.6%	76.2%	71.2%	65.4%	73.1%
Anticipated 2005								
Yes	27.0%	27.6%	29.4%	21.9%	28.6%	20.3%	30.8%	34.6%
No	73.0%	72.4%	70.6%	78.1%	71.4%	79.7%	69.2%	65.4%
7. Abandon Route Segments: Occurred During 2004								
Yes	26.3%	24.1%	28.6%	28.1%	24.4%	27.1%	30.8%	15.4%
No	73.7%	75.9%	71.4%	71.9%	75.6%	72.9%	69.2%	84.6%
Anticipated 2005								
Yes	24.2%	17.9%	27.3%	19.4%	30.0%	23.2%	29.4%	16.0%
No	75.8%	82.1%	72.7%	80.6%	70.0%	76.8%	70.6%	84.0%
8. Delay Implementation of New Services: Occurred During 2004								
Yes	52.3%	48.1%	67.6%	58.1%	37.5%	51.7%	56.0%	45.8%
No	47.7%	51.9%	32.4%	41.9%	62.5%	48.3%	44.0%	54.2%
Anticipated 2005								
Yes	51.9%	51.9%	64.7%	38.2%	52.5%	50.0%	54.9%	50.0%
No	48.1%	48.1%	35.3%	61.8%	47.5%	50.0%	45.1%	50.0%
9. Cut Administrative Expenses: Occurred During 2004								
Yes	57.5%	60.7%	48.4%	54.5%	64.3%	62.1%	56.9%	48.0%
No	42.5%	39.3%	51.6%	45.5%	35.7%	37.9%	43.1%	52.0%
Anticipated 2005								
Yes	48.9%	53.6%	51.6%	29.0%	58.5%	57.6%	36.2%	52.0%
No	51.1%	46.4%	48.4%	71.0%	41.5%	42.4%	63.8%	48.0%

(Shaded Cells  Vary by More Than 10 Percentage Points from the "Total" Average Value)

Category	Total	Region				Area Size		
		Northeast and Mid-Atlantic	Midwest and Plains	Southeast and Gulf Coast	West	Over 1 Million	200,000 to 999,999	Less Than 200,000
Number of Respondents in Sample Group	140	29	35	34	42	60	53	27
10. Reduce Staff:								
Occurred During 2004								
Yes	33.8%	21.4%	38.2%	36.4%	36.6%	37.3%	32.0%	29.6%
No	66.2%	78.6%	61.8%	63.6%	63.4%	62.7%	68.0%	70.4%
Anticipated 2005								
Yes	24.1%	29.6%	28.1%	15.6%	23.8%	24.1%	18.8%	33.3%
No	75.9%	70.4%	71.9%	84.4%	76.2%	75.9%	81.3%	66.7%
11. Freeze Hiring:								
Occurred During 2004								
Yes	33.3%	35.7%	26.5%	40.6%	31.7%	42.4%	24.5%	29.6%
No	66.7%	64.3%	73.5%	59.4%	68.3%	57.6%	75.5%	70.4%
Anticipated 2005								
Yes	32.6%	33.3%	36.4%	29.0%	31.7%	37.3%	21.7%	40.7%
No	67.4%	66.7%	63.6%	71.0%	68.3%	62.7%	78.3%	59.3%
12. Defer Maintenance:								
Occurred During 2004								
Yes	16.1%	10.7%	14.7%	17.6%	19.5%	20.3%	11.8%	14.8%
No	83.9%	89.3%	85.3%	82.4%	80.5%	79.7%	88.2%	85.2%
Anticipated 2005								
Yes	18.8%	18.5%	18.8%	18.2%	19.5%	22.4%	12.5%	22.2%
No	81.2%	81.5%	81.3%	81.8%	80.5%	77.6%	87.5%	77.8%
13. Delay Capital Projects:								
Occurred During 2004								
Yes	55.5%	42.9%	70.6%	51.5%	54.8%	52.5%	58.8%	55.6%
No	44.5%	57.1%	29.4%	48.5%	45.2%	47.5%	41.2%	44.4%
Anticipated 2005								
Yes	50.7%	48.1%	60.6%	40.6%	52.4%	50.8%	47.9%	55.6%
No	49.3%	51.9%	39.4%	59.4%	47.6%	49.2%	52.1%	44.4%

VARIATION OF RESPONSES AMONG RESPONDENTS CATEGORIZED BY FLEET SIZE AND VEHICLE MODE

Table 11 compares responses among transit system respondents grouped in categories by fleet size and whether or not the transit systems operates rail service. Responses are in the same order as questions on the survey instrument, a copy of which is shown in Appendix A on page 23.

The groupings by "Fleet Size" are:

500 or more vehicles,
200 to 299 vehicles,
100 to 199 vehicles,
50 to 99 vehicles, and
Fewer than 50 vehicles.

The groupings by "Rail Modes" are:

With CR, HR, or LR: Any transit system that operates commuter rail, heavy rail, or light rail.

Cells that are shaded indicate values that are more than 10 percentage points higher or lower than the value for all respondents. The value for all respondents is listed in the "Total" column.

Table 11: Responses Compared by Fleet Size and Rail vs. Non-rail Modes
(Shaded Cells  Vary by More Than 10 Percentage Points from the "Total" Average Value)

Category	Total	Fleet Size					Rail Modes (a)	
		500 or More Vehicles	200 to 499 Vehicles	100 to 199 Vehicles	50 to 99 Vehicles	Fewer Than 50 Vehicles	With CR, HR, or LR	No Rail
Number of Respondents in Sample Group	140	22	26	25	31	36	29	111
Impacts of Economic and Funding Conditions								
1. Ridership During Peak Hours: Occurred During 2004								
Increase	59.3%	47.6%	57.7%	47.8%	66.7%	68.6%	51.7%	61.3%
Same	9.6%	19.0%	3.8%	13.0%	6.7%	8.6%	17.2%	7.5%
Decrease	31.1%	33.3%	38.5%	39.1%	26.7%	22.9%	31.0%	31.1%
Anticipated 2005								
Increase	70.5%	55.0%	68.0%	69.6%	80.0%	73.5%	66.7%	71.4%
Same	19.7%	30.0%	12.0%	26.1%	10.0%	23.5%	25.9%	18.1%
Decrease	9.8%	15.0%	20.0%	4.3%	10.0%	2.9%	7.4%	10.5%
2. Ridership During Off Peak Hours: Occurred During 2004								
Increase	57.1%	57.9%	61.5%	45.8%	53.3%	64.7%	60.7%	56.2%
Same	9.8%	15.8%	0.0%	16.7%	13.3%	5.9%	14.3%	8.6%
Decrease	33.1%	26.3%	38.5%	37.5%	33.3%	29.4%	25.0%	35.2%
Anticipated 2005								
Increase	68.7%	57.9%	72.0%	66.7%	73.3%	69.7%	74.1%	67.3%
Same	21.4%	31.6%	8.0%	29.2%	13.3%	27.3%	22.2%	21.2%
Decrease	9.9%	10.5%	20.0%	4.2%	13.3%	3.0%	3.7%	11.5%
3. Property Insurance Premiums: Occurred During 2004								
Increase	64.6%	55.0%	62.5%	69.6%	74.1%	60.6%	44.4%	70.0%
Same	22.0%	15.0%	25.0%	17.4%	18.5%	30.3%	22.2%	22.0%
Decrease	13.4%	30.0%	12.5%	13.0%	7.4%	9.1%	33.3%	8.0%
Anticipated 2005								
Increase	56.8%	55.0%	56.5%	60.9%	63.0%	50.0%	44.4%	60.2%
Same	34.4%	30.0%	39.1%	34.8%	25.9%	40.6%	37.0%	33.7%
Decrease	8.8%	15.0%	4.3%	4.3%	11.1%	9.4%	18.5%	6.1%

(Shaded Cells  Vary by More Than 10 Percentage Points from the "Total" Average Value)

Category	Total	Fleet Size					Rail Modes (a)	
		500 or More Vehicles	200 to 499 Vehicles	100 to 199 Vehicles	50 to 99 Vehicles	Fewer Than 50 Vehicles	With CR, HR, or LR	No Rail
Number of Respondents in Sample Group	140	22	26	25	31	36	29	111
4. Liability Insurance Premiums: Occurred During 2004								
Increase	69.0%	57.9%	72.7%	65.2%	82.8%	63.6%	51.9%	73.7%
Same	23.0%	21.1%	18.2%	21.7%	17.2%	33.3%	22.2%	23.2%
Decrease	7.9%	21.1%	9.1%	13.0%	0.0%	3.0%	25.9%	3.0%
Anticipated 2005								
Increase	68.5%	73.7%	66.7%	69.6%	75.9%	59.4%	70.4%	68.0%
Same	25.8%	21.1%	23.8%	21.7%	20.7%	37.5%	18.5%	27.8%
Decrease	5.6%	5.3%	9.5%	8.7%	3.4%	3.1%	11.1%	4.1%
5. Income from Dedicated Taxes: Occurred During 2004								
Increase	59.3%	88.2%	52.6%	50.0%	65.0%	41.2%	71.4%	55.7%
Same	31.9%	5.9%	15.8%	44.4%	35.0%	58.8%	9.5%	38.6%
Decrease	8.8%	5.9%	31.6%	5.6%	0.0%	0.0%	19.0%	5.7%
Anticipated 2005								
Increase	65.6%	76.5%	72.2%	55.6%	71.4%	50.0%	71.4%	63.8%
Same	28.9%	11.8%	22.2%	33.3%	28.6%	50.0%	14.3%	33.3%
Decrease	5.6%	11.8%	5.6%	11.1%	0.0%	0.0%	14.3%	2.9%
6. State and Local Government Funding: Occurred During 2004								
Increase	34.3%	25.0%	66.7%	28.0%	36.7%	20.0%	34.6%	34.3%
Same	39.6%	45.0%	20.8%	44.0%	30.0%	54.3%	46.2%	38.0%
Decrease	26.1%	30.0%	12.5%	28.0%	33.3%	25.7%	19.2%	27.8%
Anticipated 2005								
Increase	35.6%	25.0%	60.9%	28.0%	40.0%	26.5%	38.5%	34.9%
Same	40.9%	70.0%	30.4%	36.0%	30.0%	44.1%	53.8%	37.7%
Decrease	23.5%	5.0%	8.7%	36.0%	30.0%	29.4%	7.7%	27.4%
7. Non-operating Revenues: Occurred During 2004								
Increase	36.2%	35.0%	56.0%	26.1%	34.5%	30.3%	46.2%	33.7%
Same	40.0%	25.0%	32.0%	30.4%	58.6%	45.5%	26.9%	43.3%
Decrease	23.8%	40.0%	12.0%	43.5%	6.9%	24.2%	26.9%	23.1%
Anticipated 2005								
Increase	35.4%	40.0%	47.8%	31.8%	37.9%	24.2%	50.0%	31.7%
Same	50.4%	40.0%	34.8%	54.5%	62.1%	54.5%	34.6%	54.5%
Decrease	14.2%	20.0%	17.4%	13.6%	0.0%	21.2%	15.4%	13.9%
8. Operating Budget Deficit: Occurred During 2004								
Increase	57.9%	42.1%	66.7%	45.0%	60.0%	69.0%	57.7%	58.0%
Same	26.3%	31.6%	14.3%	35.0%	32.0%	20.7%	26.9%	26.1%
Decrease	15.8%	26.3%	19.0%	20.0%	8.0%	10.3%	15.4%	15.9%
Anticipated 2005								
Increase	52.3%	57.9%	42.1%	33.3%	60.0%	63.0%	61.5%	49.4%
Same	35.1%	26.3%	26.3%	61.9%	32.0%	29.6%	30.8%	36.5%
Decrease	12.6%	15.8%	31.6%	4.8%	8.0%	7.4%	7.7%	14.1%
Agency Responses to Negative Economic and Funding Conditions								
1. Increase Fares: Occurred During 2004								
Yes	33.8%	36.4%	34.6%	36.0%	19.4%	42.9%	41.4%	31.8%
No	66.2%	63.6%	65.4%	64.0%	80.6%	57.1%	58.6%	68.2%
Anticipated 2005								
Yes	38.5%	42.9%	30.8%	41.7%	40.0%	38.2%	46.4%	36.4%
No	61.5%	57.1%	69.2%	58.3%	60.0%	61.8%	53.6%	63.6%
2. Take Money from Reserves: Occurred During 2004								
Yes	50.4%	57.1%	46.2%	34.8%	58.6%	52.9%	46.4%	51.4%
No	49.6%	42.9%	53.8%	65.2%	41.4%	47.1%	53.6%	48.6%
Anticipated 2005								
Yes	36.9%	33.3%	24.0%	36.4%	44.8%	42.4%	35.7%	37.3%
No	63.1%	66.7%	76.0%	63.6%	55.2%	57.6%	64.3%	62.7%

(Shaded Cells  Vary by More Than 10 Percentage Points from the "Total" Average Value)

Category	Total	Fleet Size					Rail Modes (a)	
		500 or More Vehicles	200 to 499 Vehicles	100 to 199 Vehicles	50 to 99 Vehicles	Fewer Than 50 Vehicles	With CR, HR, or LR	No Rail
Number of Respondents in Sample Group	140	22	26	25	31	36	29	111
3. Implement Transit Tax Ballot Initiative:								
Occurred During 2004								
Yes	10.2%	14.3%	9.1%	8.3%	7.1%	12.1%	7.7%	10.8%
No	89.8%	85.7%	90.9%	91.7%	92.9%	87.9%	92.3%	89.2%
Anticipated 2005								
Yes	7.9%	9.5%	9.1%	12.5%	0.0%	9.1%	7.7%	8.0%
No	92.1%	90.5%	90.9%	87.5%	100.0%	90.9%	92.3%	92.0%
4. Increase Non-Fare Revenues:								
Occurred During 2004								
Yes	30.8%	28.6%	33.3%	28.0%	39.3%	25.0%	40.7%	28.2%
No	69.2%	71.4%	66.7%	72.0%	60.7%	75.0%	59.3%	71.8%
Anticipated 2005								
Yes	45.0%	45.5%	43.5%	52.0%	50.0%	35.5%	57.1%	41.6%
No	55.0%	54.5%	56.5%	48.0%	50.0%	64.5%	42.9%	58.4%
5. Reduce Fleet Size:								
Occurred During 2004								
Yes	13.7%	18.2%	38.5%	4.0%	6.7%	5.6%	24.1%	10.9%
No	86.3%	81.8%	61.5%	96.0%	93.3%	94.4%	75.9%	89.1%
Anticipated 2005								
Yes	10.9%	22.7%	8.0%	20.0%	3.3%	5.6%	17.9%	9.1%
No	89.1%	77.3%	92.0%	80.0%	96.7%	94.4%	82.1%	90.9%
6. Reduce Frequency of Services:								
Occurred During 2004								
Yes	30.7%	33.3%	40.0%	36.0%	26.7%	22.2%	39.3%	28.4%
No	69.3%	66.7%	60.0%	64.0%	73.3%	77.8%	60.7%	71.6%
Anticipated 2005								
Yes	27.0%	27.3%	24.0%	36.0%	23.3%	25.7%	28.6%	26.6%
No	73.0%	72.7%	76.0%	64.0%	76.7%	74.3%	71.4%	73.4%
7. Abandon Route Segments:								
Occurred During 2004								
Yes	26.3%	38.1%	38.5%	28.0%	13.8%	19.4%	39.3%	22.9%
No	73.7%	61.9%	61.5%	72.0%	86.2%	80.6%	60.7%	77.1%
Anticipated 2005								
Yes	24.2%	40.0%	20.0%	32.0%	14.3%	20.6%	25.9%	23.8%
No	75.8%	60.0%	80.0%	68.0%	85.7%	79.4%	74.1%	76.2%
8. Delay Implementation of New Services:								
Occurred During 2004								
Yes	52.3%	63.6%	52.2%	41.7%	51.7%	52.9%	51.9%	52.4%
No	47.7%	36.4%	47.8%	58.3%	48.3%	47.1%	48.1%	47.6%
Anticipated 2005								
Yes	51.9%	59.1%	43.5%	50.0%	43.3%	61.1%	48.1%	52.8%
No	48.1%	40.9%	56.5%	50.0%	56.7%	38.9%	51.9%	47.2%
9. Cut Administrative Expenses:								
Occurred During 2004								
Yes	57.5%	72.7%	66.7%	61.5%	51.6%	44.1%	85.2%	50.5%
No	42.5%	27.3%	33.3%	38.5%	48.4%	55.9%	14.8%	49.5%
Anticipated 2005								
Yes	48.9%	63.6%	65.2%	56.5%	37.9%	32.4%	75.0%	41.7%
No	51.1%	36.4%	34.8%	43.5%	62.1%	67.6%	25.0%	58.3%
10. Reduce Staff:								
Occurred During 2004								
Yes	33.8%	45.5%	43.5%	37.5%	32.3%	19.4%	50.0%	29.6%
No	66.2%	54.5%	56.5%	62.5%	67.7%	80.6%	50.0%	70.4%
Anticipated 2005								
Yes	24.1%	40.9%	27.3%	20.8%	13.8%	22.2%	37.0%	20.8%
No	75.9%	59.1%	72.7%	79.2%	86.2%	77.8%	63.0%	79.2%

(Shaded Cells  Vary by More Than 10 Percentage Points from the "Total" Average Value)

Category	Total	Fleet Size					Rail Modes (a)	
		500 or More Vehicles	200 to 499 Vehicles	100 to 99 Vehicles	50 to 99 Vehicles	Fewer Than 50 Vehicles	With CR, HR, or LR	No Rail
Number of Respondents in Sample Group	140	22	26	25	31	36	29	111
11. Freeze Hiring:								
Occurred During 2004								
Yes	33.3%	63.6%	39.1%	34.8%	19.4%	22.2%	53.6%	28.0%
No	66.7%	36.4%	60.9%	65.2%	80.6%	77.8%	46.4%	72.0%
Anticipated 2005								
Yes	32.6%	54.5%	39.1%	27.3%	24.1%	25.0%	53.6%	26.9%
No	67.4%	45.5%	60.9%	72.7%	75.9%	75.0%	46.4%	73.1%
12. Defer Maintenance:								
Occurred During 2004								
Yes	16.1%	31.8%	12.5%	16.7%	12.9%	11.1%	25.0%	13.8%
No	83.9%	68.2%	87.5%	83.3%	87.1%	88.9%	75.0%	86.2%
Anticipated 2005								
Yes	18.8%	36.4%	17.4%	13.0%	13.8%	16.7%	29.6%	16.0%
No	81.2%	63.6%	82.6%	87.0%	86.2%	83.3%	70.4%	84.0%
13. Delay Capital Projects:								
Occurred During 2004								
Yes	55.5%	72.7%	50.0%	62.5%	51.6%	47.2%	71.4%	51.4%
No	44.5%	27.3%	50.0%	37.5%	48.4%	52.8%	28.6%	48.6%
Anticipated 2005								
Yes	50.7%	63.6%	45.8%	56.5%	48.3%	44.4%	64.3%	47.2%
No	49.3%	36.4%	54.2%	43.5%	51.7%	55.6%	35.7%	52.8%

(a) Rail modes for this differentiation are limited to commuter rail, heavy rail, and light rail.

Written by John Neff, Senior Policy Researcher, (202) 496-4812 or jneff@apta.com and Larry Pham, Chief-Economist and Director Information Services, (202) 496-4813 or lpham@apta.com.

Appendix A: Copy of Survey Instrument



American Public Transportation Association

February 22, 2005

IMPACT OF ECONOMIC CONDITIONS ON PUBLIC TRANSPORTATION

*For the past two years APTA has conducted a survey to obtain information on the impact of the economy on the ridership and finances of public transportation agencies. The resulting reports, published in *Passenger Transport*, were distributed to members and repeatedly cited in numerous press articles and professional journals. This survey will be used to assist transit systems in their continuing search for means to minimize the negative impacts of fluctuating economic conditions. Your cooperation in responding to this survey at your earliest convenience before March 21, 2005, is greatly appreciated. We will send the resulting report to all those responding to the survey. Thank you.*

A. Impacts of Economic and Funding Conditions: What was your organization's experience in the following ridership and funding categories during Calendar Year (CY) 2004 and what do you anticipate it will be during Calendar Year (CY) 2005. (Please mark all that apply, leave blank if you do not have data):

	Occurred During CY 2004 (compared to 2003)			Anticipated in Calendar Year 2005		
	Increase	Same	Decrease	Increase	Same	Decrease
1. Ridership during peak hours						
2. Ridership during off-peak hours						
3. Property insurance premiums						
4. Liability insurance premiums						
5. Income from dedicated taxes						
6. State and local government funding						
7. Non-operating revenues						
8. Operating budget deficit						

B. Agency Responses to Negative Economic and Funding Conditions: Has your organization undertaken any of the following responses to negative economic and funding conditions during Calendar Year (CY) 2004, or do you project that any will be implemented during Calendar Year (CY) 2005. (Please mark Yes or No to all that apply):

	Occurred during CY 2004 (compared to 2003)		Expected during CY 2005	
	Yes	No	Yes	No
Increasing Revenues				
1. Increase fares				
2. Take money from reserves				
3. Implement transit tax ballot initiative				
4. Increase non-fare revenues (describe in C below)				
Reducing Services				
5. Reduce fleet size				
6. Reduce frequency of services				
7. Abandon route segments				
8. Delay implementation of new services				
Cutting Expenses				
9. Cut administrative expenses				
10. Reduce Staff				
11. Freeze Hiring				
12. Defer maintenance				
13. Delay capital projects				

C. Comments (Please insert or attach comments to elaborate on any of the above responses):

D. Transit Agency Name

Respondent Name:

Telephone:

Email:

Return the survey by Monday, March 21, 2005, to Mr. John Neff, American Public Transportation Association, 1666 K Street, N.W., Washington, D.C. 20006; or by fax to (202) 496-4322; or by email to jneff@apta.com. A copy of this survey suitable for attaching to email may be found at <http://www.apta.com/impactsurvey.doc>. For questions, please call Mr. Neff at (202) 496-4812 or Dr. Larry Pham at (202) 496-4813.