PEER REGIONS TRANSIT REPORT SUMMARY

Mid-America Regional Council
Transportation Department

MARC
MID-AMERICA REGIONAL COUNCIL

History

This report serves to set a benchmark for our regional transit system and how it compares to peer transit systems in terms of funding, ridership, service area and density. Data for this report was collected from the National Transit Database, the 5-year American Community Survey and a qualitative survey sent to the primary transit agency from each city included in the report.

The Peer Cities Transit Research Report was created in 2011 to support work by Johnson County's Transit Funding Task Force (START), as well as to aid in ongoing discussions regarding the development of a strategy for regional transit investment in Kansas City. Updated versions of the report were created in 2014 and 2018 to serve as a resource for MARC's transportation committees. The update provides a snapshot on how transit agencies across the county were affected by the COVID-19 pandemic and provides insight into the recovery process.

■ Peer transit agency
● Aspirational transit agency
◆ Home transit agency

Minneapolis-St. Paul

Milwaukee

Pittsburgh

Denver

Columbus

Indianapolis

Cincinnati

St. Louis

Louisville

Kansas City

Nashville

Charlotte

Oklahoma City

Memphis

Austin

PEER & ASPIRATIONAL REGIONS

Peer transit agency — a transit agency similar in size and landlocked geography to Kansas City's primary transit agency, KCATA. These agencies are color-coded in green throughout the report.

Primary transit agency	Urbanized area
Southwest Ohio Regional Transit Authority (SORTA)	Cincinnati
Central Ohio Transit Authority (COTA)	Columbus
Indianapolis Public Transportation Corporation (IndyGo)	Indianapolis
Transit Authority of River City (TARC)	Louisville
Memphis Area Transit Authority (MATA)	Memphis
Milwaukee County Transit System (MCTS)	Milwaukee
Nashville Metropolitan Transit Authority (MTA)	Nashville
COTPA (EMBARK)	Oklahoma City
Port Authority of Allegheny County	Pittsburgh
St. Louis Metro	St. Louis

Aspirational transit agency — an agency that generates the degree of ridership, funding and transit-supportive culture that the Kansas City area would like to see in the future. These agencies are color-coded in blue throughout the report.

Primary transit agency	Urbanized area
Capital Metro	Austin
Charlotte Area Transit System (CATS)	Charlotte
Regional Transportation District (RTD)	Denver
Metro Transit	Minneapolis-St. Paul

Home transit agency — color-coded in yellow throughout the report.

Kansas City Area Transit Authority (KCATA)	Kansas City

Aspirational Systems

A survey was distributed to peer and aspirational transit agencies, and agencies were asked to list their own aspirational systems. Many peer agencies indicated that Denver RTD was an aspirational system, as well as CapMetro in Austin, CATS in Charlotte, Metro Transit in Minneapolis, and Sound Transit in Seattle. One peer identified the KCATA as an aspirational agency. Aspirational agencies that responded cited Tri-Met Transit in Portland, Oregon and Massachusetts Bay Transit in Boston.

Summary of Significant Findings

Kansas City area transit agencies spent $46.53 in state, local funds and directly generated revenues per capita in 2022; this figure ranks 12th out of 15 analyzed Urbanized Areas (UZAs) that were studied in this report. This is less than both peer and aspirational agency average spent per capita, and **a 28% decrease in funding spent per capita from $59.51* in 2016.**

The average combined state and local per capita operating funding for peer UZAs, including Kansas City, was reduced 18.2% from $72.97*per person in 2016 to $59.70 per person in 2022.

- The average combined state, local and directly generated revenues per capita for aspirational regions is $138.34 in 2022.
- Minneapolis-St. Paul, Pittsburgh, and Milwaukee UZAs receive the much of their operating funding from their respective states. Meanwhile, a number of regions, including Kansas City, Cincinnati, Nashville, and Louisville receive a very small proportion of funding from state sources and are funded primarily through local funding.
- Columbus, Ohio's primary transit agency operating funds come largely from fares and directly generated revenue, with 7.8% of the total operating funds expended being from fares and other directly generated sources. Columbus and Denver also see large shares of their funding from directly generated revenues (regional or county-based taxes for transit systems).
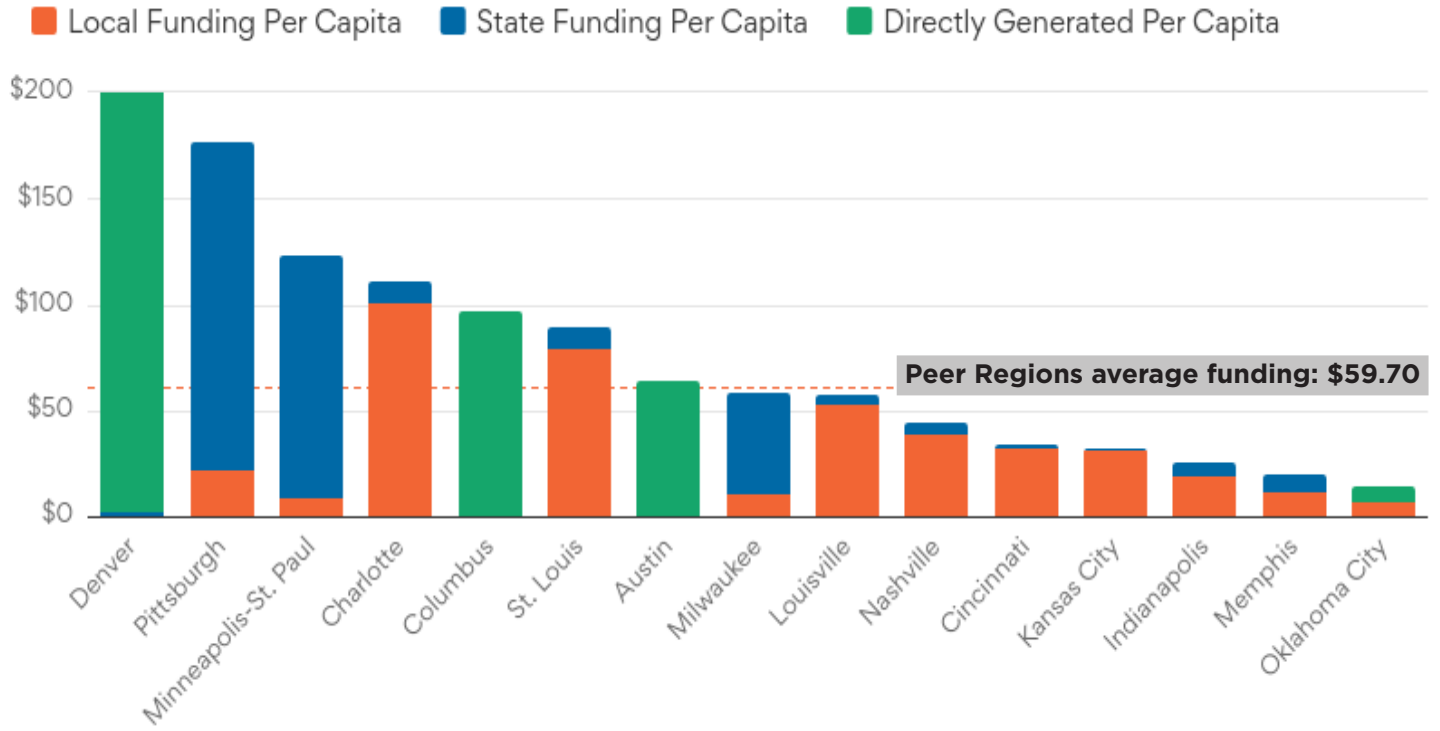
*All figures adjusted for inflation

State Operating Funding

In 2021, the Kansas City UZA received $1.39 million in state operating funding, ranking 10th out of 15 total peer and aspirational UZAs. Kansas agencies spent $986,182 of this total, while Missouri spent $403,312. The Kansas City UZA's total state operating funding received is below the median of peer cities of $8.7 million, while aspirational cities on average received $148 million. However, **this aspirational figure has gone up in recent years, but is not yet reflected in current data.**

Urbanized area or UZA — The urbanized area data used for this report are taken from the 2020 Decennial Census. New to 2020, an urban area is defined as a densely settled core of census blocks that meet a minimum housing unit density of 425 housing units per square mile and encompass at least 2,000 total housing units or have a population of at least 5,000.

UZA State and Local Operating Funding per Capita
National Transit Database (2022)

Legend: ■ Local Funding Per Capita ■ State Funding Per Capita ■ Directly Generated Per Capita

Peer Regions average funding: $59.70

UZA State and Local Funds Expended (in millions)
National Transit Database (2022)

Legend: ■ Local Funds Spent ■ State Funds Spent ■ Directly Generated*

*Directly generated funds is money collected specifically for transportation projects like fares paid by passengers, taxes specificially for transit projects, or other local fees.
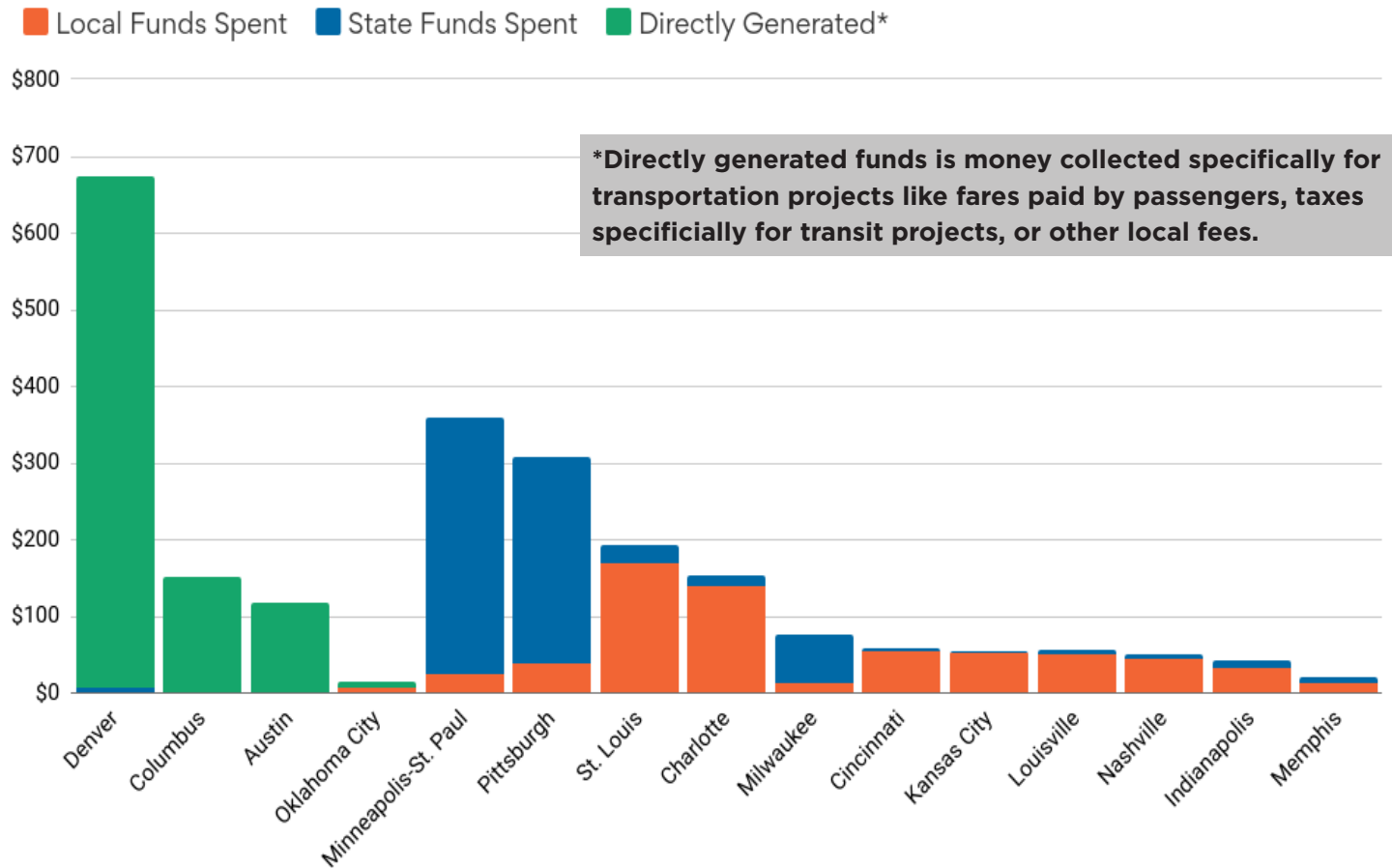
Transit Funding in the Kansas City Metro Area
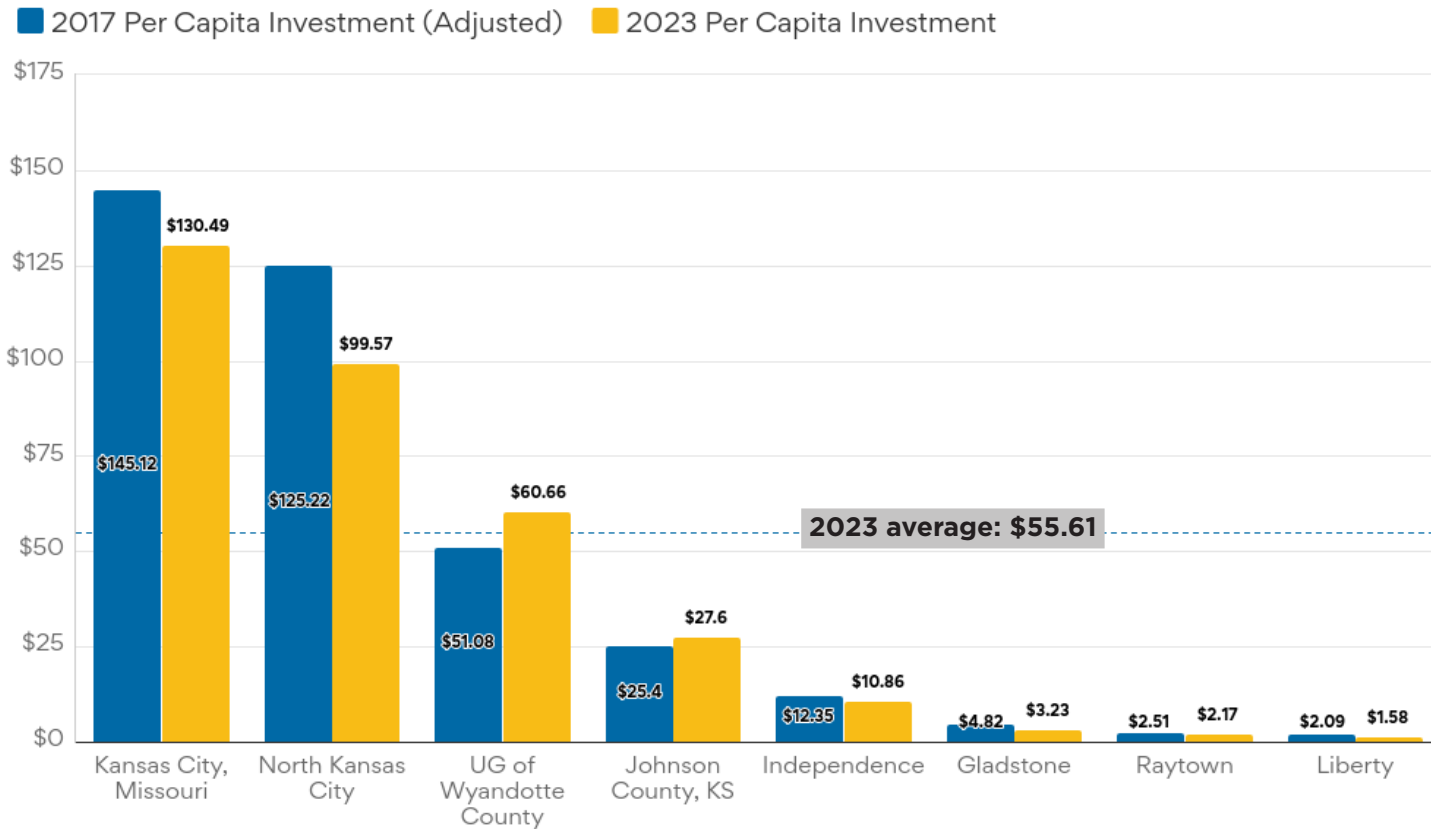
Local Per Capita Investment by Jurisdiction
ACS (2016-2022) Jurisdictional Budget information (FY 2016-17/2022-23)

Legend:
- 2017 Per Capita Investment (Adjusted)
- 2023 Per Capita Investment

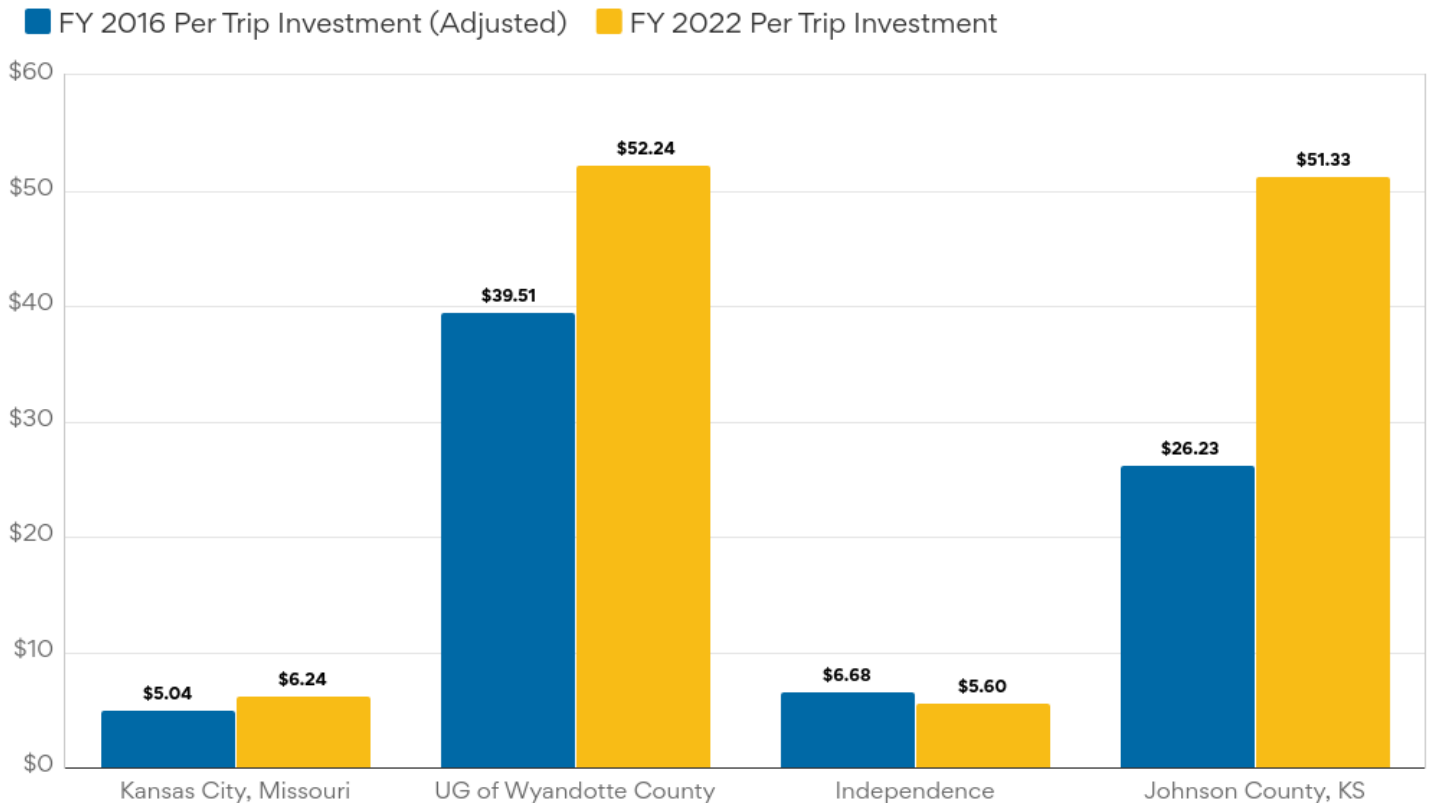| Jurisdiction	2017 Per Capita Investment (Adjusted)	2023 Per Capita Investment
Kansas City, Missouri	$145.12	$130.49
North Kansas City	$125.22	$99.57
UG of Wyandotte County	$51.08	$60.66
Johnson County, KS	$25.4	$27.6
Independence	$12.35	$10.86
Gladstone	$4.82	$3.23
Raytown	$2.51	$2.17
Liberty	$2.09	$1.58

2023 average: $55.61

Transit funding varies widely across the Kansas City region. In 2023, the contributing jurisdictions in the Kansas City region averaged $55.61 per capita on transit services. Locally, Kansas City, Missouri, had the highest contribution with $130.49 in local investment per capita. (Note: Contributions within the Transportation Development District are significantly higher.)

Meanwhile, North Kansas City, Missouri, contributed $99.57 in local investment per capita, while the Unified Government of Wyandotte County rounded out the top three with $60.66 in local investment per capita.

The top three jurisdictions are unchanged from the previous version of this report, however relative to changes in investment, Johnson County and Wyandotte County have seen a relative increase in funding, while every other jurisdiction has seen a small per capita decrease in that time. It is important to note that these numbers have been adjusted for inflation to 2023 dollars.

Cost per Trip by Jurisdiction
Jurisdictional Budget information (FY 2016-17/2022-23) NTD (2016/22)

Legend: ■ FY 2016 Per Trip Investment (Adjusted) ■ FY 2022 Per Trip Investment

Jurisdiction	FY 2016 Per Trip Investment (Adjusted)	FY 2022 Per Trip Investment
Kansas City, Missouri	$5.04	$6.24
UG of Wyandotte County	$39.51	$52.24
Independence	$6.68	$5.60
Johnson County, KS	$26.23	$51.33

On a per trip basis, Kansas City, Missouri and Independence both have low cost per unlinked passenger trip (UPT), with $6.24 and $5.60 per trip, respectively. Meanwhile, UG of Wyandotte County and Johnson County both have much higher cost per trip with $52.24 and $51.33 per trip, respectively. Both of these counties had a large portion of these costs attributed to paratransit and demand response trip expenses. This figure is affected by both total number of trips in each jurisdiction, as well as total budgeted investment.

Sales Taxes

Sales taxes are a common local funding method used by several large primary transit agencies. KCATA is funded in part by two sales taxes within Kansas City, Missouri. One of the two taxes, a 3/8 cent sales tax, was recently renewed by vote in March 2024. The other tax is allocated as part of a half-cent retail sales tax levied by the Missouri state legislature in 1971.

Other models for sales taxation from peer and aspirational transit agencies are based on a combination of city and county sales taxes or service area sales taxes, including:
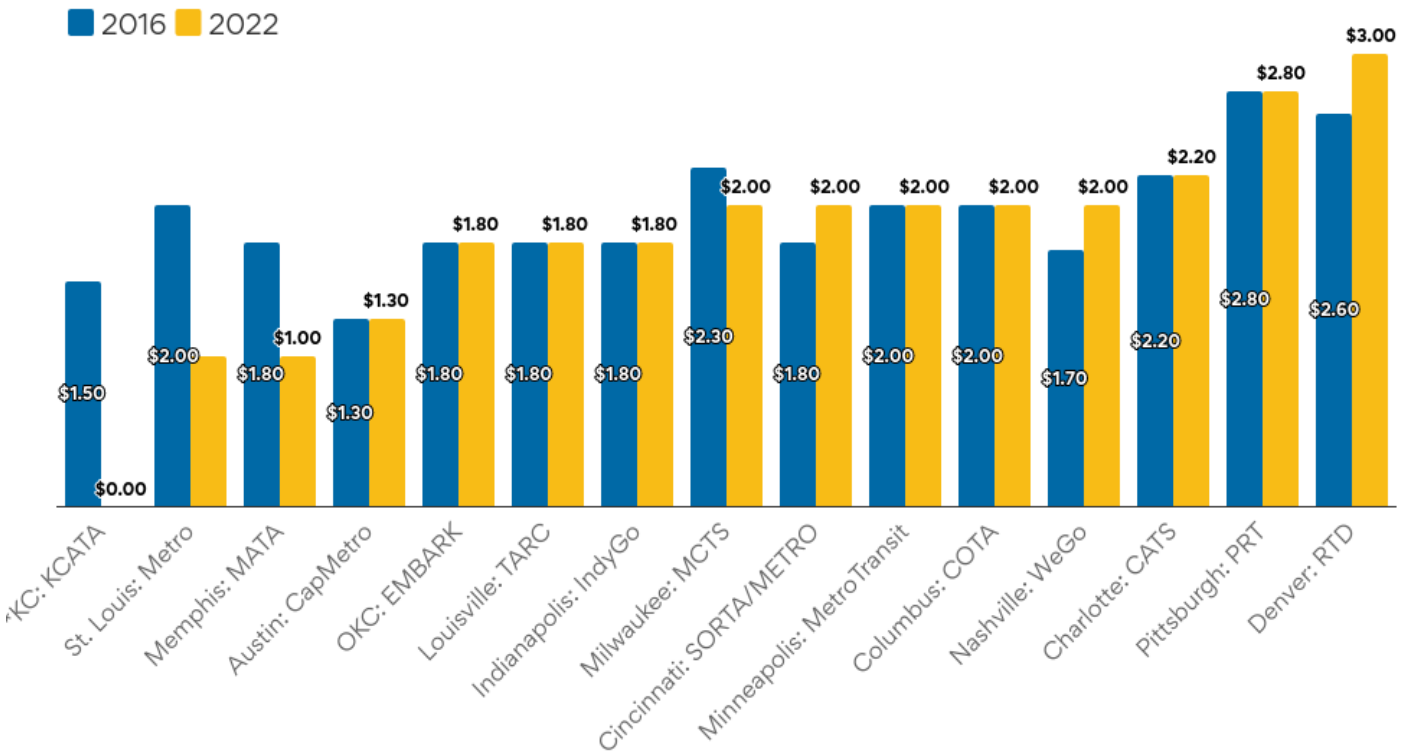
- Austin: 1 cent sales tax on service area members.
- Cincinnati: A permanent, 0.8 cent countywide sales tax levy passed in 2020 to replace City of Cincinnati-based payroll tax, with 25 percent of the taxes collected going towards sidewalks, road, and bridge repairs along transit routes.
- Columbus, Ohio: 1/4 cent permanent sales and use tax on voters in the COTA service area, as well as an additional 1/4 cent temporary sales tax with a ten-year renewal passed in 2016.

- St. Louis: one cent total sales tax in the City of St. Louis, Missouri, and 1 1/4 cent sales tax in St. Louis County, Missouri.
- Denver: 1 cent sales and use tax in the regional transportation district.

Fare Comparison

Single Ride Bus Fare by Primary Agency
Agency Websites (2016/2022)

Chart legend: 2016 (blue), 2022 (yellow)

Agency	2016	2022
KC: KCATA	$1.50	$0.00
St. Louis: Metro	$2.00	$1.80
Memphis: MATA	$1.80	$1.00
Austin: CapMetro	$1.30	$1.30
OKC: EMBARK	$1.80	$1.80
Louisville: TARC	$1.80	$1.80
Indianapolis: IndyGo	$1.80	$1.80
Milwaukee: MCTS	$2.30	$2.00
Cincinnati: SORTA/METRO	$1.80	$2.00
Minneapolis: MetroTransit	$2.00	$2.00
Columbus: COTA	$2.00	$2.00
Nashville: WeGo	$1.70	$2.00
Charlotte: CATS	$2.20	$2.20
Pittsburgh: PRT	$2.80	$2.80
Denver: RTD	$2.60	$3.00

KCATA (and the RideKC system as a whole) is the only agency studied that does not charge for bus fares, as the transit system began experimenting with a fare free model in 2019, with free trips starting and ending in Kansas City, Missouri, and later switched entirely to fare free system wide in March of 2020 during the COVID-19 pandemic, remaining free since that time. Other primary transit agencies offer a variety of different price models, with discounted rates for seniors, children, and others, and some having rush hour pricing increases. Metro Transit in Minneapolis utilizes rush hour pricing at busier times each weekday, and RTD in Denver uses zone and distance-based fares, with fare prices increasing as the trip distance increases.

Fare Revenues

After switching to a fare free model, KCATA has generated the lowest fare revenue among all peers at $692,785 and the lowest farebox recovery rate (the proportion of operating expenses that are paid for by fare revenues) at 0.6 percent. In 2016, the fare box ratio for the KCATA was 12 percent. Within the Kansas City UZA's other agencies, Johnson County has a recovery ratio of 0.1 percent, while the remainder of the local agencies reported 0.0 percent recovery.
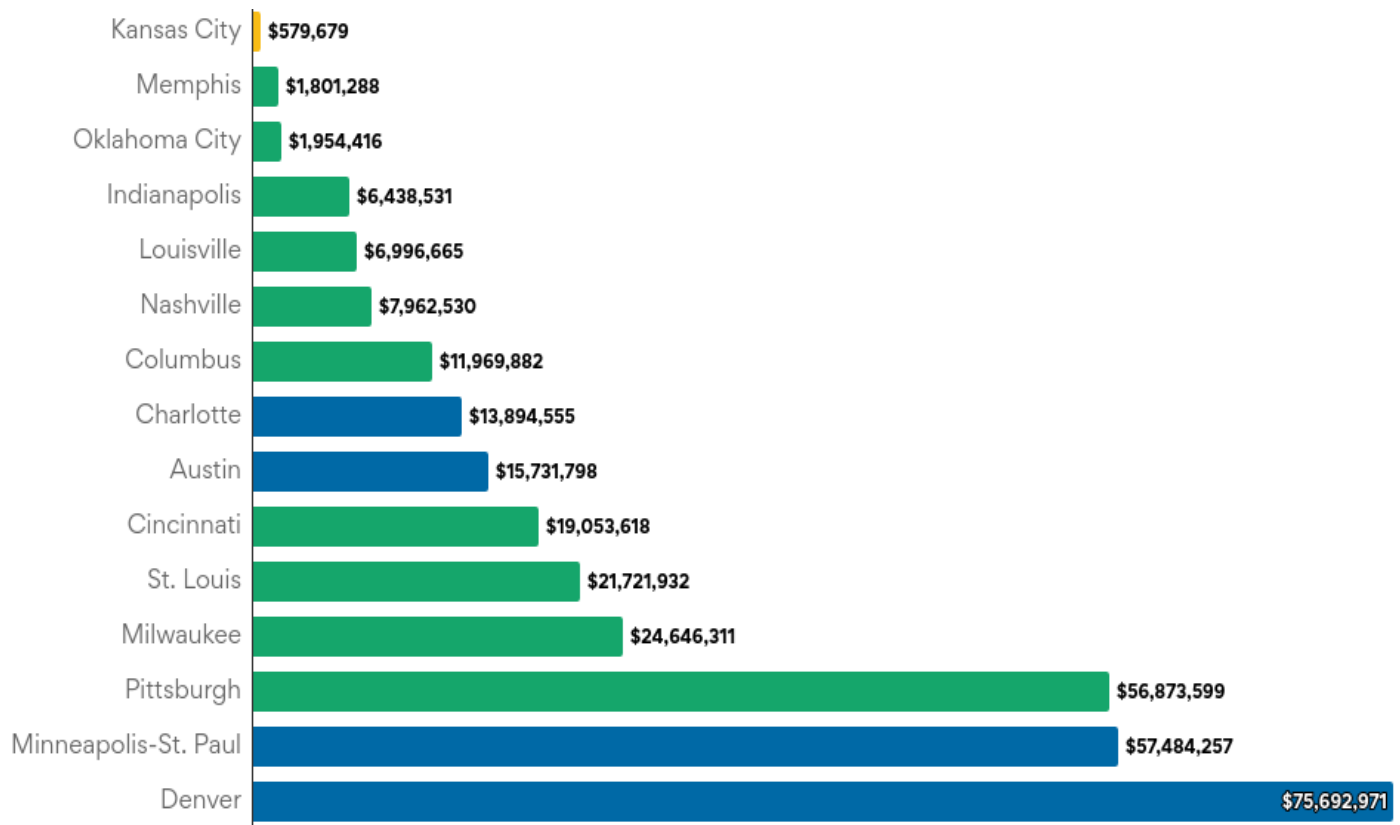
No other city among peers or aspirational cities has fully switched to a fare free approach, but some agencies have various programs to lower costs for riders by group or mode:

- St. Louis Metro has free fare for low income (household income of $69,000 per year or less) riders under 25 years old until the end of 2024.
- Austin offers free passes for those registered as homeless with HMIS (Homeless Management Information System)
- A number of metros, including Milwaukee and Pittsburgh, offer free ridership through colleges and universities to students.
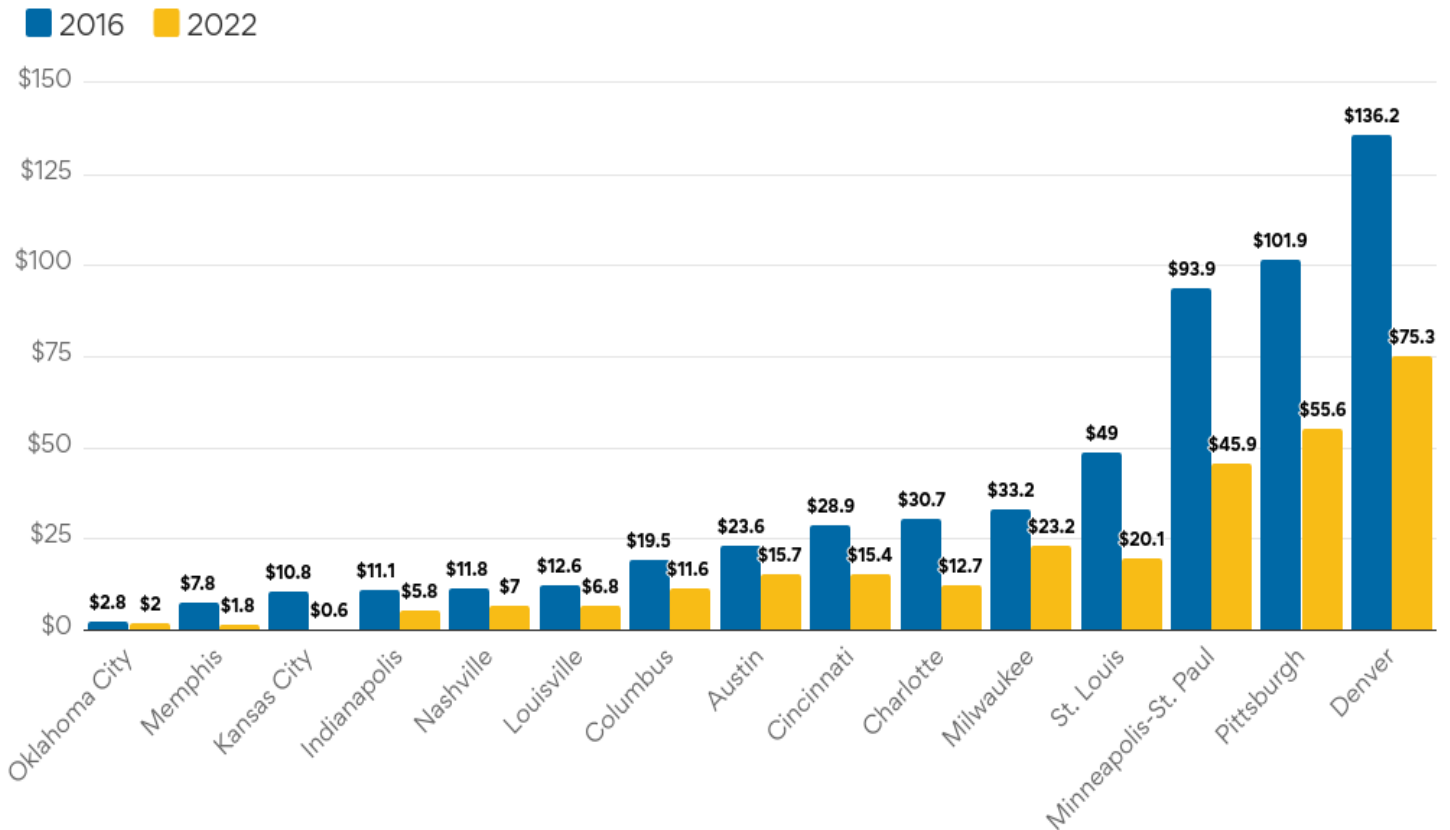
Despite an expected decrease in the Kansas City area after suspending fare revenue collection, since 2016, every other city has seen similar drop-offs in fare revenue and farebox recovery ratio. Agencies have seen a median decrease of 53 percent of total fare revenues, and a 12 percent median drop in farebox recovery ratios.

Fare Revenues by UZA
National Transit Database (2022)

UZA	Fare Revenue
Kansas City	$579,679
Memphis	$1,801,288
Oklahoma City	$1,954,416
Indianapolis	$6,438,531
Louisville	$6,996,665
Nashville	$7,962,530
Columbus	$11,969,882
Charlotte	$13,894,555
Austin	$15,731,798
Cincinnati	$19,053,618
St. Louis	$21,721,932
Milwaukee	$24,646,311
Pittsburgh	$56,873,599
Minneapolis-St. Paul	$57,484,257
Denver	$75,692,971

Fare Revenues for Operating Expended by Primary Agency (in millions)
National Transit Database (2016/2022)

Legend: ■ 2016 ■ 2022

City	2016	2022
Oklahoma City	$2.8	$2
Memphis	$7.8	$1.8
Kansas City	$10.8	$0.6
Indianapolis	$11.1	$5.8
Nashville	$11.8	$7
Louisville	$12.6	$6.8
Columbus	$19.5	$11.6
Austin	$23.6	$15.7
Cincinnati	$28.9	$15.4
Charlotte	$30.7	$12.7
Milwaukee	$33.2	$23.2
St. Louis	$49	$20.1
Minneapolis-St. Paul	$93.9	$45.9
Pittsburgh	$101.9	$55.6
Denver	$136.2	$75.3

Service Area Density
(Population per square mile, ACS 5-year 2016, 2022)

Legend: ■ 2016 ■ 2022

City	2016	2022
Denver	1,247	1,247
Kansas City	1,730	1,355
Nashville	1,355	1,397
Pittsburgh	1,826	1,598
Charlotte	1,597	1,936
Memphis	2,334	2,374
Indianapolis	2,344	2,448
Austin	2,174	2,454
Louisville	2,260	2,556
Cincinnati	3,226	2,578
Oklahoma City	2,665	2,767
St. Louis	2,806	2,801
Columbus	3,280	3,479
Minneapolis-St. Paul	2,814	3,520
Milwaukee	4,041	3,914
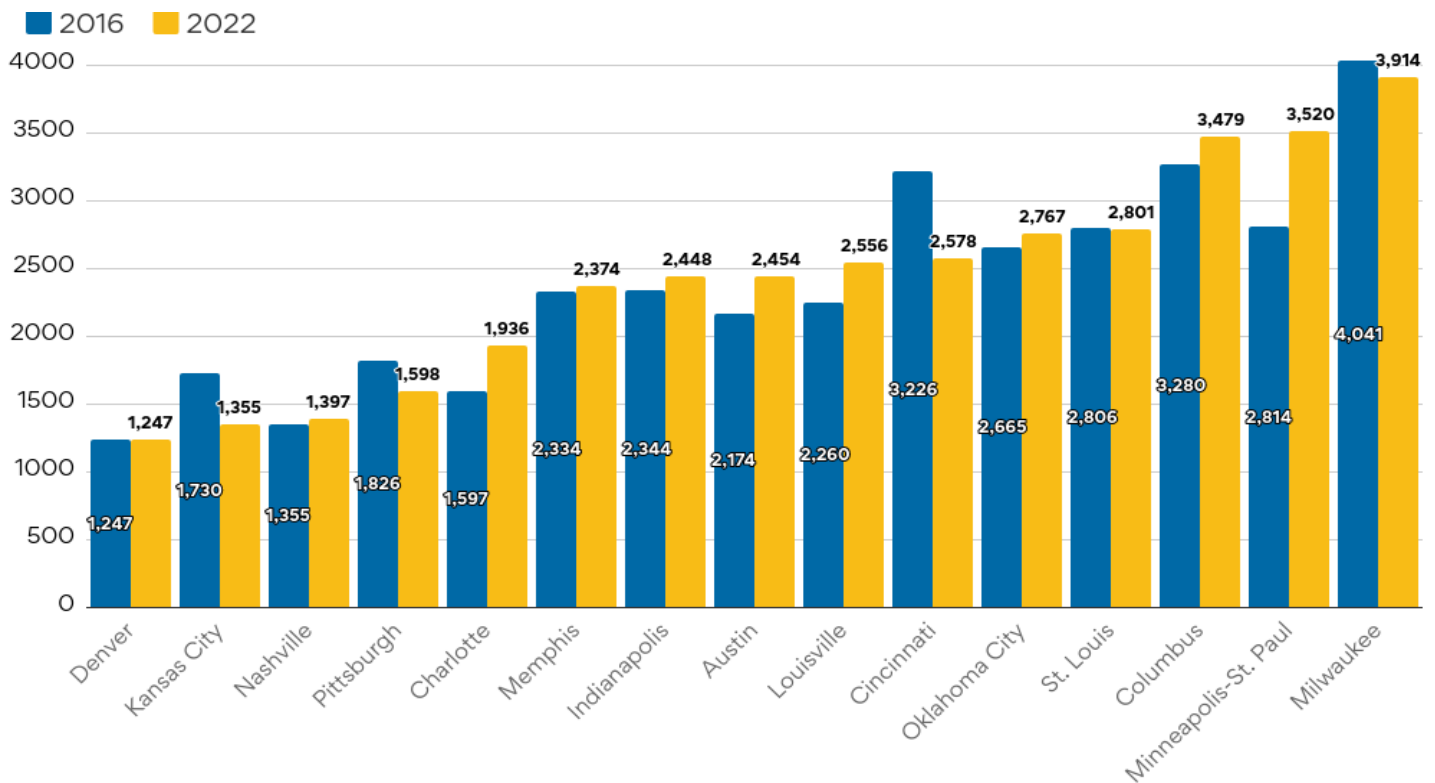
Service Area Density

KCATA ranks 12th out of 15 in service area density at 1,875 persons per square mile. This remains unchanged from its position in 2016. The service area density increased by 8.4% in that time, compared to the median increase of 1.6 percent. Rank in service area density did not correspond closely with rank in ridership, as shown on page 10.

- Milwaukee's MCTS has the highest service area density out of all primary agencies, at 3,914 persons per square mile. The UZA of Milwaukee also ranks highly in terms of ridership (18.5 million annual unlinked trips), and operating expense per trip ($8.81).
- MetroTransit in Minneapolis gained the most density between 2016 and 2021, increasing from 2,814 to 3,520 persons per square mile. This 25.1 percent increase corresponded with the Minneapolis area having the second-lowest loss in ridership in that time among studied cities.
- Denver has the lowest service area density out of all primary agencies, 1,247 persons per square mile, yet had the highest ridership at 48.9 million annual unlinked trips.

Note: Service density is affected by many factors and could have increased or decreased because of expanded service, or service ending in outlying areas.

Branding

The transit angecies within the Kansas City UZA operate under one brand — RideKC. This allows for several separate entities to share resources, organization, and branding without sacrificing total autonomy. Several different types of transit entities operate under the same branding umbrella.

- RideKC includes Johnson County Transit, UG Transit (Wyandotte County), IndeBus (Independence, MO) transit agencies.
- KC Streetcar is operated under the RideKC name.
- RideKC Bike is a bike sharing program operated by BikeWalk KC.
- IRIS: the KCATA's growing on-demand raid-hailing platform uses RideKC as part of its branding.

The only other urban area that has a similar configuration is Nashville, where the regional and local transit agencies (RTA and MTA respectively) together as "WeGo."

Funding Performance

Primary transit agencies were compared based on operating expense per unlinked trip:

- KCATA ranked **2nd out of 11 peer agencies and 2nd out of all primary agencies in terms of operating expense per passenger trip at $9.35.** While this was an increase from $6.60 in the previous report, the 43% increase was less than the average increase of 166% for all agencies. Notably this increase was higher in peer-cities (in green) relative to aspirational cities (in blue).

Operating Expense per Unlinked Passenger Trip by Primary Agency - All Modes
National Transit Database (2016/2022)

Milwaukee	$3.61	$8.16
Kansas City	$6.60	$9.35
Minneapolis-St. Paul	$4.62	$10.63
Denver	$5.04	$10.84
Nashville	$7.21	$11.35
Cincinnati	$6.10	$12.94
Oklahoma City	$7.82	$13.58
Austin	$6.97	$13.89
Charlotte	$4.54	$13.90
Columbus	$6.62	$13.94
Pittsburgh	$6.23	$14.03
St. Louis	$5.94	$14.36
Louisville	$5.64	$16.61
Indianapolis	$7.11	$18.72
Memphis	$6.51	$20.13

Micro-mobility

In a survey of the peer and aspirational agencies included in this report, two respondent primary agencies, in Charlotte and Nashville, stated that they had established formal agreements with ride-hailing service providers, such as Uber or Lyft. KCATA has created its own ride-hailing service in the form of IRIS which has rapidly expanded to cover Kansas City, Missouri, North Kansas City, Gladstone, and will soon be operated in Kansas City, Kansas and other municipalities. This new service provides access in areas where traditional fixed-route services are not cost-effective. Similarly, SORTA in Cincinnati and COTA in Columbus recently began offering their own point to point microtransit services and apps, which intend to fill gaps where bus service is not available.

Within the greater KC region, UG of Wyandotte County as well as Johnson County operate RideKC branded micro transit separately from IRIS, with service areas being expanded throughout 2023 and 2024.

IRIS service map
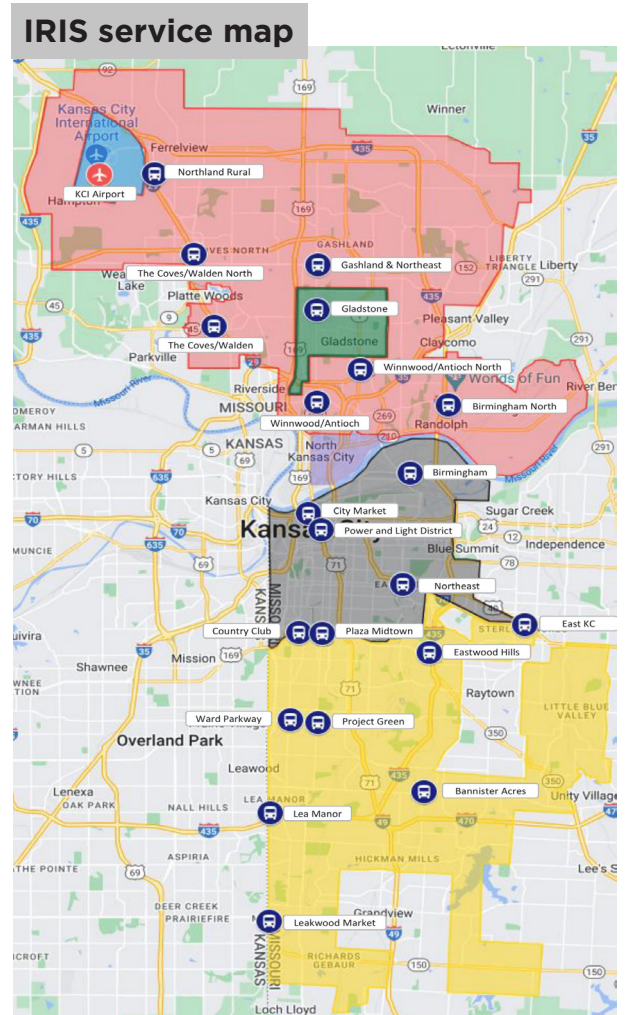
Ridership

Annual Ridership by Primary Agency			
UZA	2016	2022	% change
Austin	31,048,807	20,417,077	-34
Charlotte	26,248,940	12,640,017	-52
Cincinnati	15,566,731	9,847,273	-37
Columbus	18,827,815	10,275,316	-45
Denver	103,340,797	61,284,680	-41
Indianapolis	9,494,784	5,751,302	-39
Kansas City	14,220,399	10,572,362	-26
Louisville	14,087,286	5,341,409	-62
Memphis	7,762,476	2,976,709	-62
Milwaukee	40,709,350	18,849,230	-54
Minneapolis-St. Paul	82,624,619	38,794,641	-53
Nashville	9,915,984	6,370,413	-36
Oklahoma City	3,265,299	2,512,635	-23
Pittsburgh	63,823,513	32,328,532	-49
St. Louis	44,046,960	18,508,770	-58

Annual ridership is the number of passengers who board public transportation vehicles every year for a unique trip. Passengers are counted each time they board a vehicle, no matter how many vehicles they use to travel from their origin to their destination. In 2022, KCATA was the 5th-highest transit system ridden out of 11 peer primary agencies, and 8th out of all 15 agencies. **While ridership decreased 26 percent since the previous report in 2018, this decrease is less than the median decrease amongst all peer and aspirational primary agencies, 52.8 percent.** This shows KCATA may be more resilient in the context of decreasing nationwide ridership in the last several years.

Within the greater KC area total ridership decreased by 24.7 percent, from 16,679,197 in 2016 to 12,552,991 in 2022. The highest decrease in ridership was in Johnson County, with a 40.9 percent decline. This higher number can somewhat be attributed to Johnson County's highest percentage of those continuing to work from home. There was also a 13.8 percent decrease in ridership at UGT, and a 19.6 percent decrease at Indebus.

This summary report offers a look at significant findings. Visit marc.org/peertransit for a full report in summer 2024.