

CHATHAM AREA TRANSIT STATE OF THE SYSTEM REPORT



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1 INTRODUCTION

Savannah and Coastal Georgia have been experiencing significant changes as the city and region have shown, and continue to show, tremendous economic growth. As the economy grew, it also diversified and expanded into new markets, changing the needs and opportunities for transit services. National trends showed that operating conditions for transit services were already challenging in 2019. These challenging conditions were exacerbated in Spring 2020 when the pandemic caused widespread disruption, forcing entire industries, including transit, to reevaluate existing service models.

Within the context of change and growth, the Chatham Area Transit Authority (CAT) is evaluating its role locally in Savannah and Chatham County but also the broader region. Historically, CAT has focused its service on the City of Savannah, providing access to jobs and services within downtown and surrounding neighborhoods. It also served some of the city's most critical resources, like area hospitals, schools, and shopping centers.

CAT is therefore undertaking a Master Transit Plan (MTP) to plan for the future of mobility in the region. The MTP will position the agency to respond to opportunities created through local and regional growth, new transportation technologies, and lessons learned about travel needs and patterns. The State of the System is one of two early steps in this process. It provides an overview of CAT, including its organization, services, funding resources. It also reviews the performance of CAT's existing services, considers needs and opportunities identified in the Market Analysis (also prepared as part of the Master Transit Plan), and concludes with an assessment of strengths, weaknesses, and opportunities.

Report Structure

The State of the System report is organized around four chapters, immediately following this introductory section:

- **Chapter 2: Transit in Chatham County** provides an overview of the Chatham Area Transit agency including its organizational structure and existing services.
- **Chapter 3: Transit Ridership and Performance** explores how well CAT's existing services are used and performing according to a handful of performance metrics



- **Chapter 4: Financial Outlook** describes CAT's operating revenues, expenses and Fiscal Year 2023 budget.
- **Chapter 5: Strengths, Weaknesses, and Opportunities** summarizes the key findings across each section and presents ideas for CAT to strengthen and expand its services.

2 TRANSIT IN CHATHAM COUNTY

OVERVIEW

Chatham Area Transit Authority (CAT) is a regional transit agency that provides a combination of bus and ferry service in the Savannah urbanized area. CAT currently serves the City of Savannah, unincorporated Chatham County, and portions of Garden City and Port Wentworth. CAT's service area covers 438 square miles and a population of nearly 300,000. In 2022, CAT provided 1.7 million trips through its three types of service:

1. **CAT Bus Service**, which includes 16 bus routes and 2 downtown shuttles for a total of 18 fixed routes. The downtown shuttles are branded as the dot Express Shuttles, a fare free service funded by City of Savannah that serves the Forsyth Park area, downtown Savannah, Historic Carver Village and Cloverdale neighborhoods.
2. **CAT Mobility**, CAT's complementary paratransit service. This service is provided in accordance with the Americans with Disabilities (ADA) service and is available for individuals unable to use fixed route services due to a disability anywhere in Chatham County.
3. **Savannah Belles Ferry System**, a fare-free ferry service that connects Savannah's River Street with the Savannah International Trade and Convention Center and Hutchinson Island.



Organizational Structure

As a stand-alone authority, CAT is led by an Executive Director or Chief Executive Officer (CEO) and governed by a nine-member Board of Directors. The Board of Directors sets the policy and strategic vision for CAT and is responsible for approving the annual budget. CAT's Board of Directors includes representation from the Chatham County Commission and Savannah City Council as well as residents representing the City of Savannah plus incorporated and unincorporated Chatham County. The Board also includes a Chatham County resident with a disability.

Under new leadership, CAT has been reorganized into five departments all of which are led by the CEO:

- **Executive Division**, led by the CEO and responsible for operations in compliance with the policies, goals and objectives established by the Board of Directors. Executive Division staff includes the lead officer of CAT's other four divisions.
- **Financial Services and Compliance Division**, led by CAT's Chief Financial Officer and responsible for accounting, compliance, grants and the agency budget.
- **Administrative and Support Division** led by the Chief Administrative Officer. This team oversees human resources (including diversity, equity, and inclusion), training, procurement, safety, and IT.
- **Service Operations**, led by the Chief Operating Officer who is responsible for service operations and capital facilities/maintenance associated with fixed-route, paratransit, ferry service. The Service Operations department is the largest division in terms of staff.
- **Planning and Infrastructure Development Service**, led by the Capital Planning and Infrastructure Development Officer and responsible for strategic planning, service development, and grants development.

Mission, Goals and Objectives

Under new leadership, CAT's Board of Directors met to identify and prioritize CAT's strategic goals for both agency and service development. This conversation led to a ranking of the focus areas for CAT:

Figure 1. CAT Ranking of Agency Focus Areas



TRANSIT SERVICES

CAT's transit network is concentrated in the City of Savannah with connections to and between a handful of incorporated communities in Chatham County (Garden City and Port Wentworth) and parts of unincorporated Chatham County. CAT's service area is constrained by the Savannah River and State of South Carolina to the north and mostly serves areas to the east, west, and south of downtown Savannah.

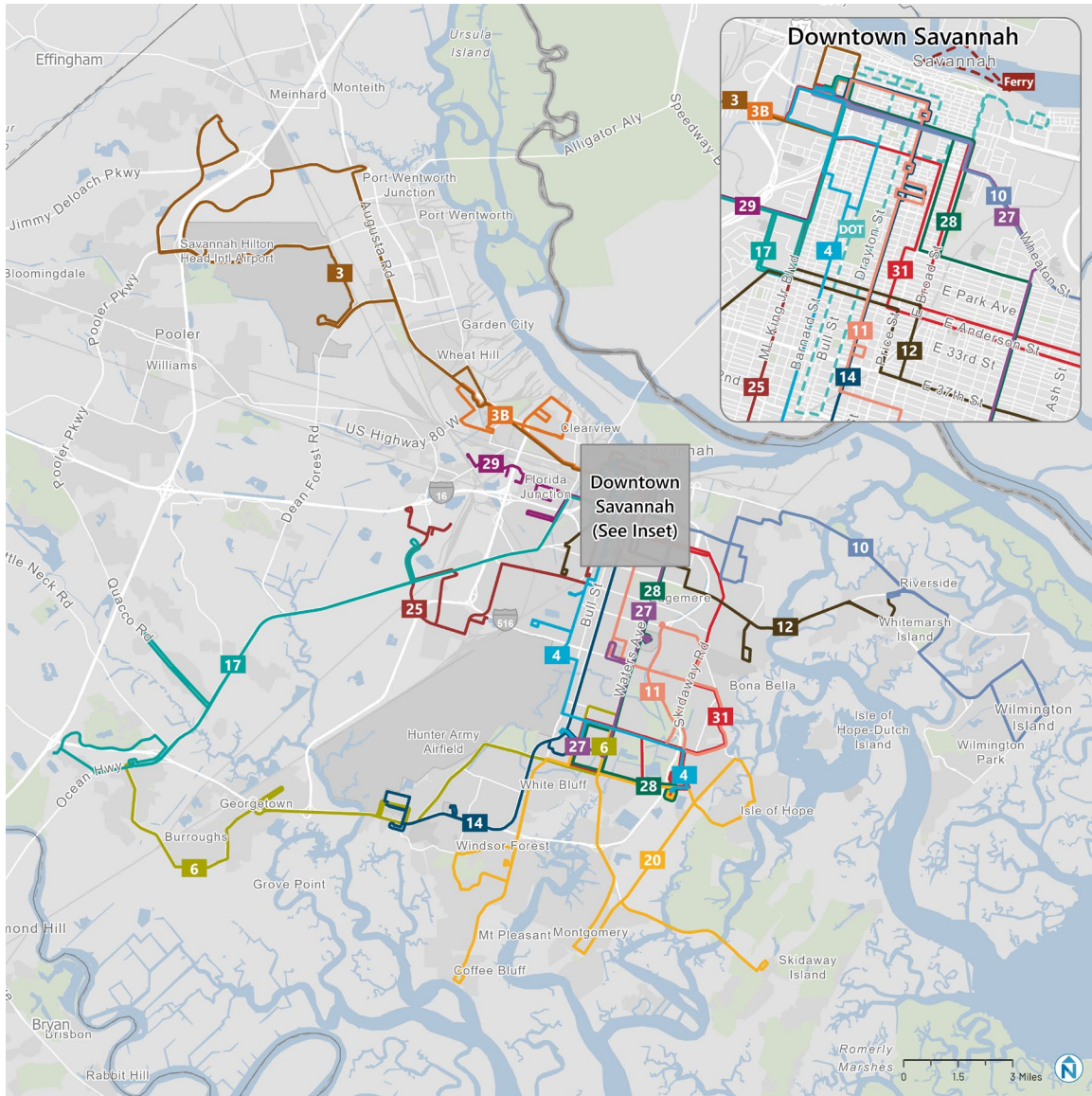
Before the temporary service cut implemented on October 31, 2022, CAT's network included:

- 18 weekday bus routes
- 15 Saturday bus routes
- 11 Sunday bus routes
- ADA Complementary paratransit
- Savannah Belles Ferry, which provides passenger ferry service connecting downtown Savannah with Savannah Convention Center and hotels on Hutchinson Island.

CAT's bus transit network operates using a combination of "grid" and "hub-and-spoke" models (see Figure 2). The grid model, where bus routes operate on parallel streets creating opportunities to change direction at intersections, is used in downtown Savannah including the historic district as far west as Anderson Street. Bus routes operate on most major north/south and east/west streets, enabling passengers to change directions by connecting with another CAT bus route at most major intersections.

CAT's service also functions as a hub-and-spoke model with the Joe Murray Rivers Intermodal Transit Center (ITC) in downtown Savannah acting as a connecting point for passengers to transfer to other routes. Twelve of the 18 bus routes connect at the ITC (only Routes 6, 12 and 20 and both Dot Shuttles do not). Most bus routes radiate from the ITC on major corridors and connect to major destinations. The ITC is open 24 hours a day, 7 days a week with climate controlled indoor waiting areas, tourist information, and connections to intercity bus service via Greyhound.

Figure 2. CAT Route Alignments



Source: 2022 GTFS

Transit Service Levels

The quality and usefulness of bus service is often described in terms of the hours and days of operation (span of service) and how often the buses operate (frequency or headway). These are essential characteristics of service because the service span determines when people can travel, and the frequency of service tells how convenient service is to use. Service span and frequency are also the primary drivers of the cost of operating transit service. Service levels by day of week are shown graphically in Figure 3.

Weekday Service

On weekdays, CAT's fixed route bus services are available for approximately 17 hours per day, starting most routes between 5:00 AM and 6:00 AM, and ending between 9:00 PM and 10:00 PM. Two bus routes (Routes 11 and 20) only operate during traditional peak periods (morning and afternoon commute times).

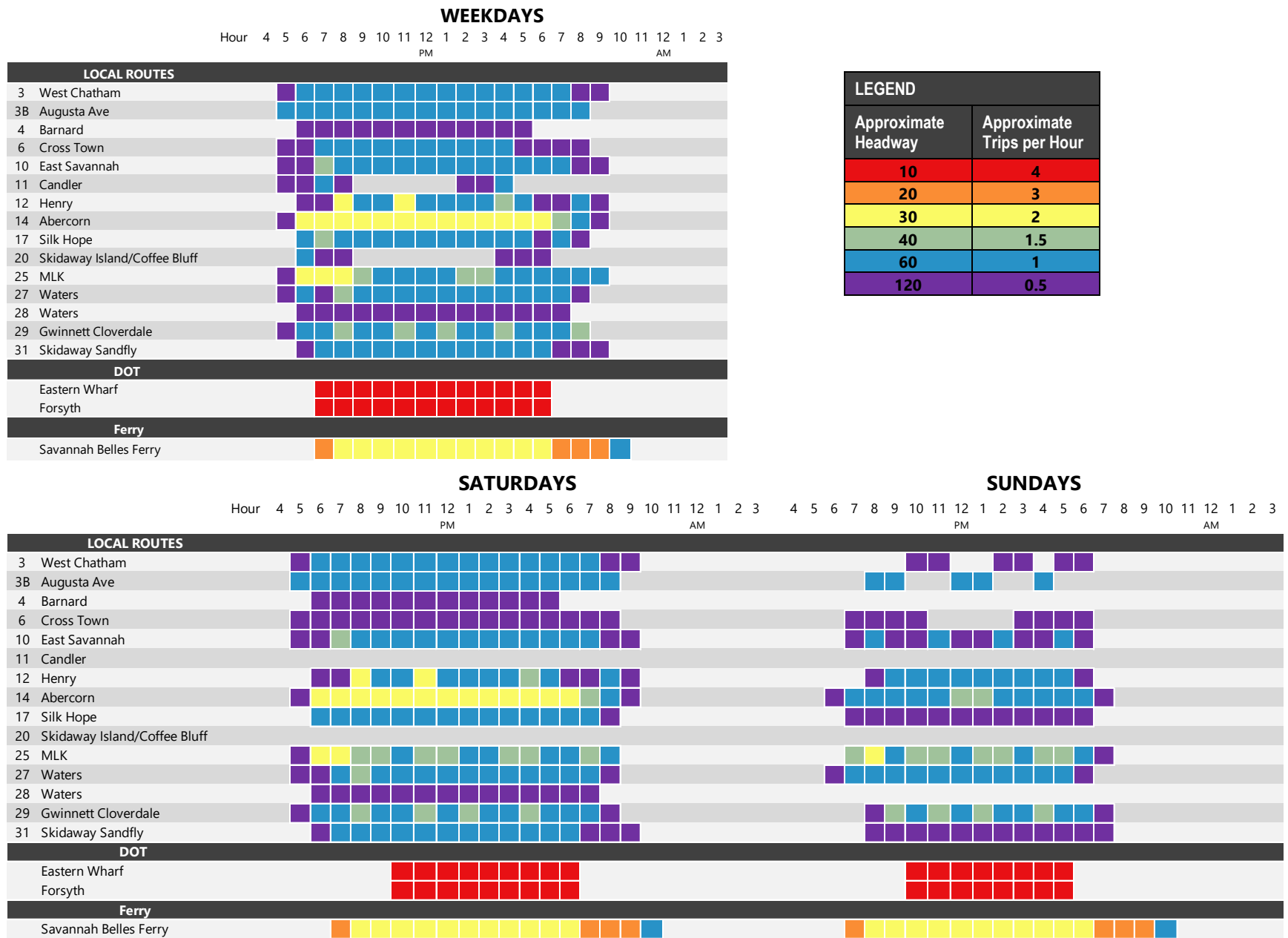
Most bus routes operate on 60-minute frequencies for most of the day. However, Route 4 Barnard and 28 Waters operate less frequently, at every 120 minutes. The most frequent service is on Route 14 Abercorn (operating every 30 minutes) and the dot Shuttles (operating every 10-minutes but at a shorter span of service from 8:00 AM to 7:00 PM).

Weekend Day Service

Saturday service is comparable to weekday service in terms of both span and frequency, although Routes 11 and 20 do not operate and the dot shuttles are available for shorter periods of time (10:00 AM to 7:00 PM).

Sunday service levels, however, are significantly lower as compared with weekday service. Only 7 CAT routes operate on Sundays, and all have reduced spans and frequencies as compared with weekdays. Three of CAT's bus routes operate 60-minute service and the remaining services operate less than hourly.

Figure 3. Service Frequency by Hour of Day by Day of Week



Source: 2022 GTFS

ADA Complementary Paratransit

CAT also operates complementary paratransit service in accordance with the Americans with Disabilities (ADA) Act of 1990. This service, branded as CAT Mobility, is available to individuals unable to use fixed route transit service because of a disability. Per ADA requirements, transit agencies must operate paratransit service with origins and destinations up to $\frac{3}{4}$ of a mile from the fixed route service. However, CAT is proud to surpass the minimum requirements by providing CAT Mobility throughout Chatham County. Passengers must become certified through an application process to use the service. Once certified, passengers are required to make trip reservations one to seven days in advance.

Belles Ferry Service

CAT operates the Savannah Belles Ferry service, which provides free passenger ferry service across the Savannah River between downtown Savannah's Riverwalk and Hutchinson Island, providing service from hotels and other amenities downtown to the Savannah Convention Center (see Figure 4). The ferries are fully accessible and operate from 7:00 AM to 10:00 PM seven days per week. Ferry service runs between City Hall Landing and Trade Center Landing, with departures scheduled every 30-minutes on the hour and half hour from City Hall. An additional stop is made at Waiving Girl Landing from 8:20 AM to 6:20 PM. CAT increases service levels upon request and in response to conventions and other events in Savannah and/or on Hutchinson Island.



Figure 4. Savannah Belles Ferry Service



Capital Investments

CAT has many ongoing and future capital investment plans. Many of the plans are in place to maintain a state of good repair for the existing fleet, such as preventive maintenance and replacement of aging rolling stock. CAT's fleet includes four passenger ferryboats and is currently in the process of procuring two ferries in Fiscal Year (FY) 2024 for a cost of \$1,600,000 each. CAT's transition to electric vehicles is continuing, with the purchase of four additional electric buses in FY 2023 as well.

CAT is also in various stages of capital investment in facilities, such as design work on the ferry maintenance facility and planning work on the paratransit maintenance facility. Updates and enhancements are planned for both CAT Central and the ITC buildings and parking lots as well.

Technology, Passenger Information and Fares

Providing simple, accessible information about transit service, including information about schedules, fares and service changes, is critical to successful transit service. CAT currently shares information about its service in several ways, including at the ITC, which has a staffed customer service kiosk as well as printed schedules and system maps. CAT also has an extensive website with information about schedules and maps, real-time bus arrival information, trip planners, and stop times. The website also has information about fares, CAT Mobility, as well as other information about the agency and its services.

Riders can download one of two mobile apps for more information.

- CAT Tracker is a mobile app that provides real-time bus arrival information in Chatham County. Riders can use this app to track their bus, know when to walk to the bus stop and/or be sure they have not missed their bus.
- Token Transit allows riders to pay for their fare through their phone. Riders who pay fares using CAT's mobile app are eligible for "fare capping". This program ensures riders can receive discounted monthly pass rates, even if they purchase single fares (i.e., as soon as they purchase 2 one-way fares, they are eligible for a day pass).

Riders can also sign up for Rider Alerts, which send text notifications about route delays, detours and other critical service information.

Fares

An adult one-way cash fare on CAT's bus service is \$1.50, which includes free transfers between routes up to 90 minutes. The one-way fare for CAT Mobility is \$2.00. The dot Shuttles in downtown Savannah and the Belles Ferry service are "fare free" to riders.

CAT provides discounts eligible individuals with disabilities, youths, older adults aged 65+ and honorably discharged veterans. CAT also offers discounts to frequent riders, including riders who purchase day, weekly, or monthly passes.

3 TRANSIT RIDERSHIP AND PERFORMANCE

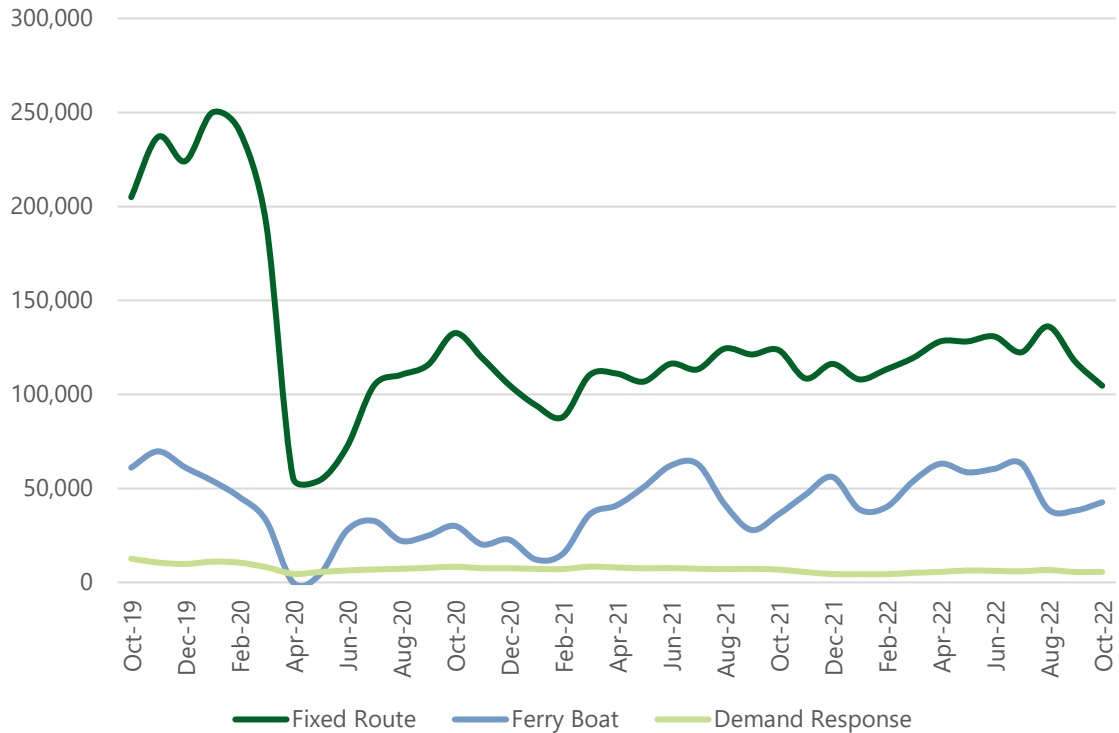
Ridership and ridership trends are an important part of understanding and improving transit networks. Understanding the routes, locations, and times of day where ridership is strongest helps indicate where services are working well, where they are needed, and where they could be improved.

CAT's ridership was relatively consistent leading up to 2019 across all modes. In FY 2019, CAT carried 3,168,774 passengers on the fixed-route network, 112,915 on CAT Mobility, and 787,468 on the Savannah Belles Ferry. The COVID-19 pandemic had a significant impact on transit ridership, with all modes showing a sharp decline in ridership in Spring 2020 (see Figure 5). Ridership decreased by 21% in March 2020, and then again by 71% in April 2020. Ridership increased over the summer of 2020 and has remained mostly stable since. Overall, however, annual ridership for FY 2022 was only 42% of FY 2019.

An additional challenge that CAT has faced is the driver shortage, which has had an impact on the quality and reliability of service. In October 2022, CAT had to reduce the amount of service it operates to match their workforce capability. CAT is currently training and hiring drivers as fast as possible, hoping to restore service by March 2023.



Figure 5. Monthly Passenger Trips



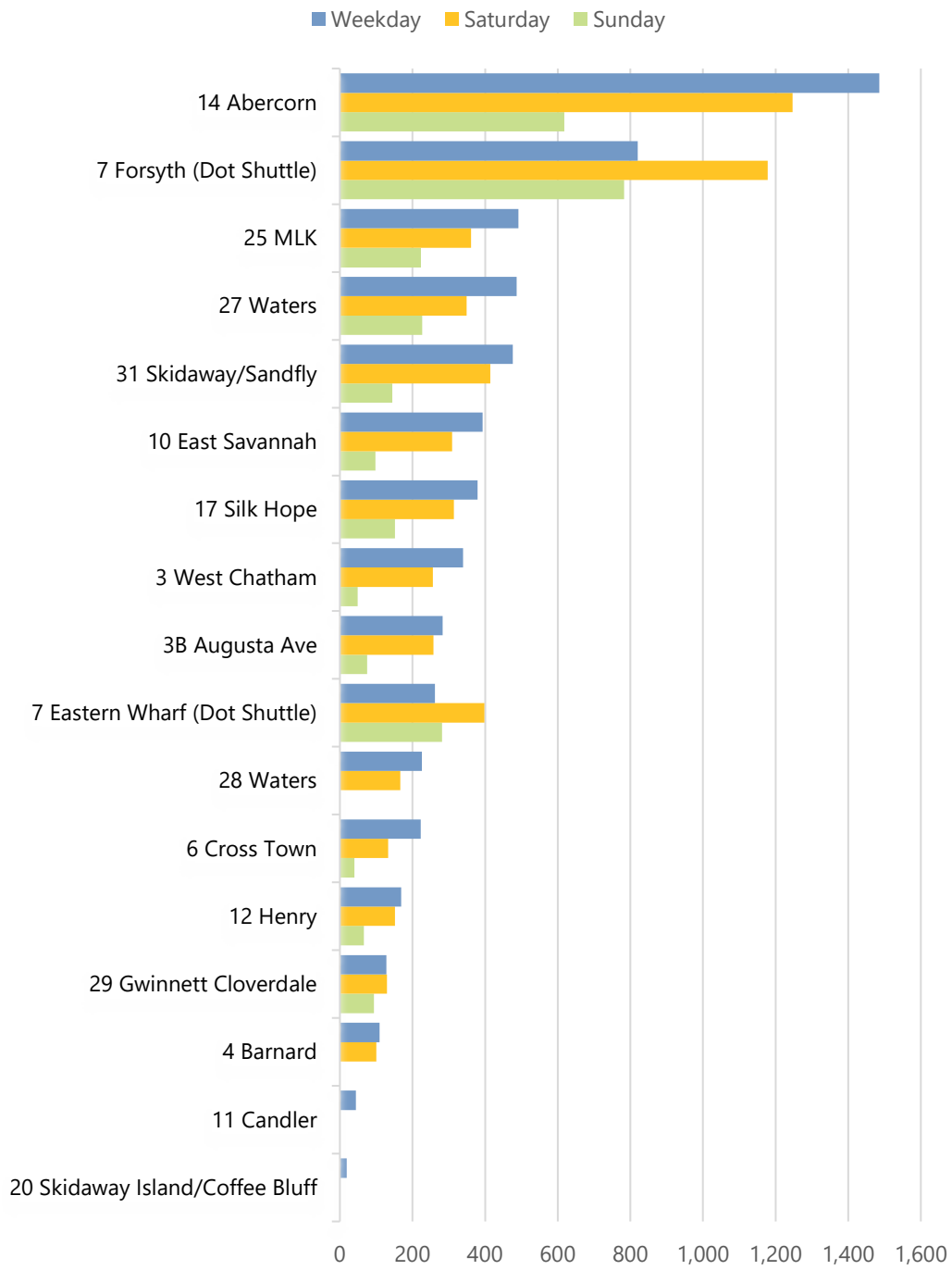
Source: National Transit Database

Ridership by Route

Ridership also varies significantly by route. CAT’s highest ridership route is Route 14 Abercorn (see Figure 6). In fact, the average weekday daily ridership for Route 14 Abercorn is nearly twice as high as the second highest ridership route, the Route 7 Forsyth (dot Shuttle). Route 14 Abercorn carries 1,486 riders on weekdays, 1,247 on Saturdays, and 618 on Sundays. CAT provides a higher level of service on Route 14 Abercorn, with 30-minute frequency on weekdays and a span of service from 5:00 AM to 10:00 PM.

Route 7 Forsyth (dot Shuttle) also has relatively high ridership with 820 riders on weekdays and 799 on Saturdays. A middle cluster of 6 bus routes carry between 300 - 500 riders per weekday and 200 - 328 riders on Saturdays.

Figure 6. Average Daily Passengers by Route



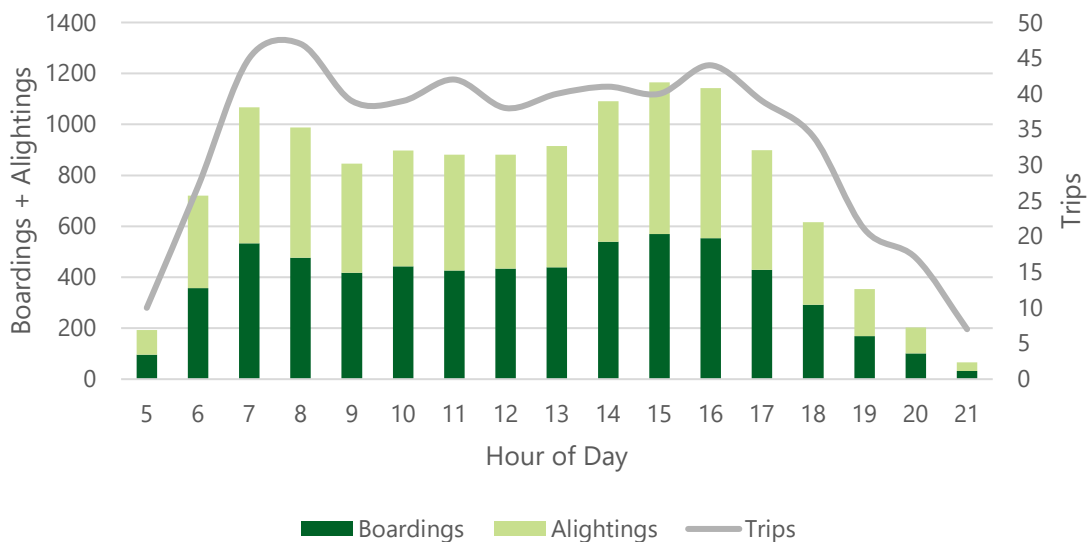
Ridership by Time of Day

Looking at transit ridership by time of day is important because CAT wants to match when it operates service with the times when people want to travel. The data shows that on weekdays, bus riders travel throughout the day, with slight peaks in the morning and afternoon (see Figure 7). These peaks reflect slightly more people traveling to and from work during traditional work times (e.g., “9-to-5 type schedules) and to and from school.

Ridership is proportionate to the amount of service available. Times when ridership is lower, at the beginning and end of the day, the availability of service is also lower.

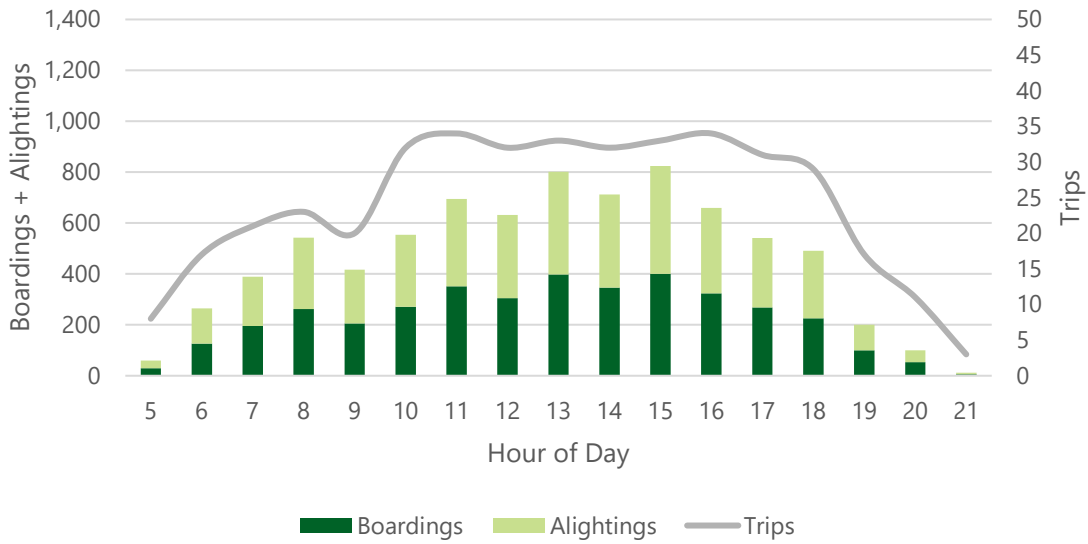
Weekend fixed route ridership shows similar trends as weekday ridership but with less service and fewer riders (see Figure 8 and Figure 9). However, ridership on Saturdays and Sundays is slightly more concentrated towards the middle hours of the day.

Figure 7. Weekday Ridership and Trips by Hour of Day



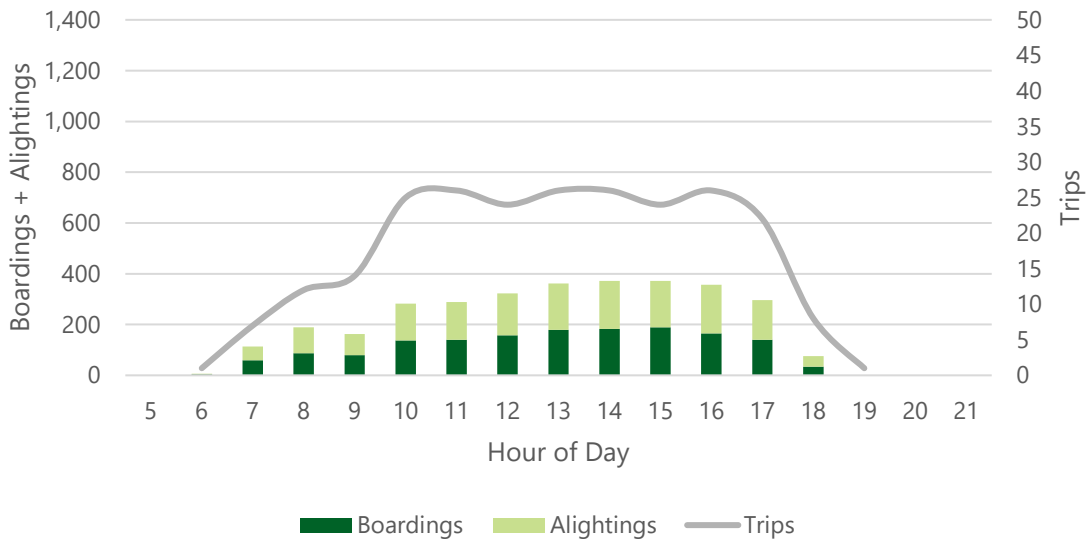
Source: August 2022 CAT APC data

Figure 8. Saturday Ridership and Trips by Hour of Day



Source: August 2022 CAT APC data

Figure 9. Sunday Ridership and Trips by Hour of Day



Source: August 2022 CAT APC data

Ridership by Stop

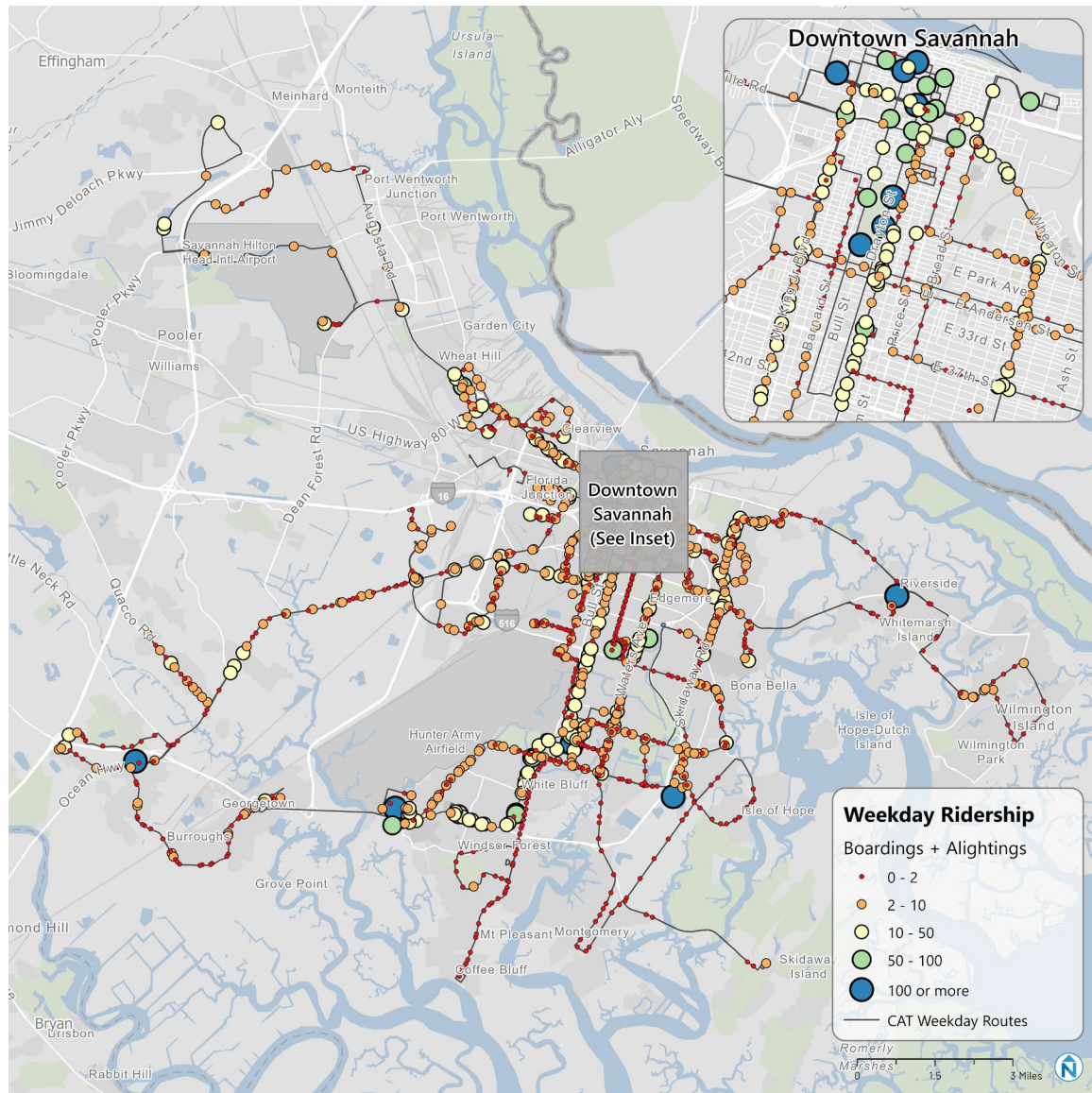
In addition to considering when people use transit, it is important to understand where they use it. Ridership by stop reveals where riders are using the existing service throughout Chatham County. Weekday ridership by stop is shown in Figure 10. Weekend service can be found in Appendix A Figure 22 (Saturdays) and Figure 23 (Sundays). Areas where transit ridership is highest suggest areas for more investment, potentially in additional service (long hours or more frequent service) or capital investments so buses can operate more reliably. Parts of the network where ridership is lower may reflect the availability of service, or they could be places where the underlying need for service is lower.

Current ridership is highest in and around downtown Savannah, along Bay and Abercorn Streets and the area around Forsyth Park as well as along East Broad Street. These areas have high density of populations and high levels of transit service, such as the dot shuttles and other bus routes that travel through downtown on their way to the ITC.

Transit ridership also clusters at around key destinations outside of downtown, such as the area surrounding Memorial Health University Medical Center and at major shopping areas such as Oglethorpe Mall and surrounding retail development. Ridership is also strong at Walmart stores, especially the locations at Highway 17 and Montgomery Cross Road.

Ridership is lower on the outer fringes of the network. For example, on weekdays, ridership is low on sections of Route 20 Skidaway Island/Coffee Bluff (Whitfield Avenue, Skidaway Road, and Ferguson Avenue), and Route 10 East Savannah on the eastern side of the Wilmington River.

Figure 10. Average Weekday Ridership Activity



Source: August 2022 CAT APC data

TRANSIT PERFORMANCE MEASURES

Transit agencies, like many organizations, try to understand their performance and productivity. A variety of factors shape and determine a transit agency's ability to attract and retain riders. These include agency budgets that dictate the amount of service available, as measured by hours of operation (span) and frequency of service. All transit trips begin or end with a walking trip to or from a bus stop, so the underlying road network and the availability of pedestrian facilities like sidewalks and crosswalks also influence transit ridership. Consequently, CAT's success and performance is highly related to the broader operating environment.

At the same time, it is still useful to evaluate the system's performance and productivity through metrics like cost per hour of service, riders per hour of service, and cost per rider. In some cases, these metrics are best evaluated in terms of trends, or how and why they change over time, rather than absolute values. There are three traditional transit performance metrics:

- **Operating cost per revenue hour** measures how well resources are allocated and is commonly used as an indicator of total unit cost of transit service. Figure 11 shows how the operating cost of transit service has risen from FY 2017 to FY 2021 by 46% for bus service, 36% for CAT Mobility, and 16% for Belles Ferry service. Overall, Bells Ferry service and bus service is comparable in cost per revenue hour (\$149.37 and \$147.20, respectively), while CAT Mobility is less expensive (\$56.84).
- **Passenger trips per revenue hour** measures service effectiveness, or how well the service provided is used. Figure 12 shows that CAT averaged ten passengers per revenue hour for the bus service, two for CAT Mobility, and 68 for Belles Ferry service. From FY 2017 to FY 2021, passenger trips per revenue hour decreased by 45% for bus and 32% for Belles Ferry service and remained the same for CAT Mobility.
- **Operating cost per passenger trip** measures the cost effectiveness of the service, or how much the service costs relative to how well the service is used. Figure 13 shows that in FY 2021, the operating cost per passenger trip on the Belles Ferry was only \$2.21, while it was \$15.26 on the bus network and \$36.21 on CAT Mobility. Overall, the cost per passenger from FY 2017 to FY 2021 increased by 36% for CAT Mobility trips, 71% for Ferry trips, and 166% for bus trips.

Figure 11. Operating Cost per Revenue Hour by Year

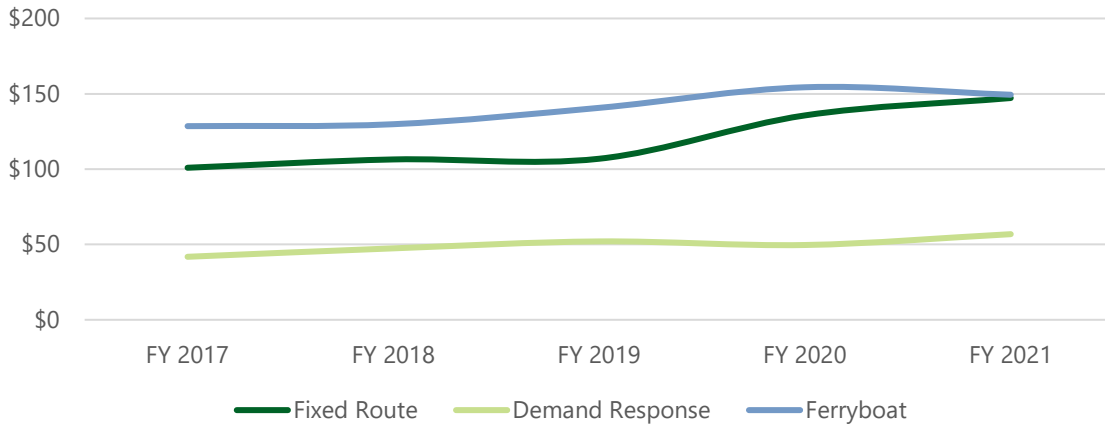


Figure 12. Passenger Trips per Revenue Hour by Year

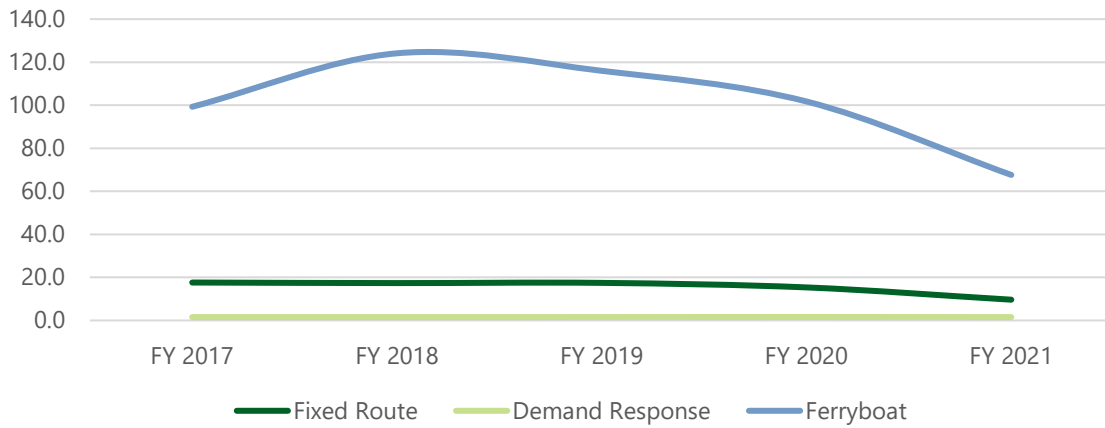
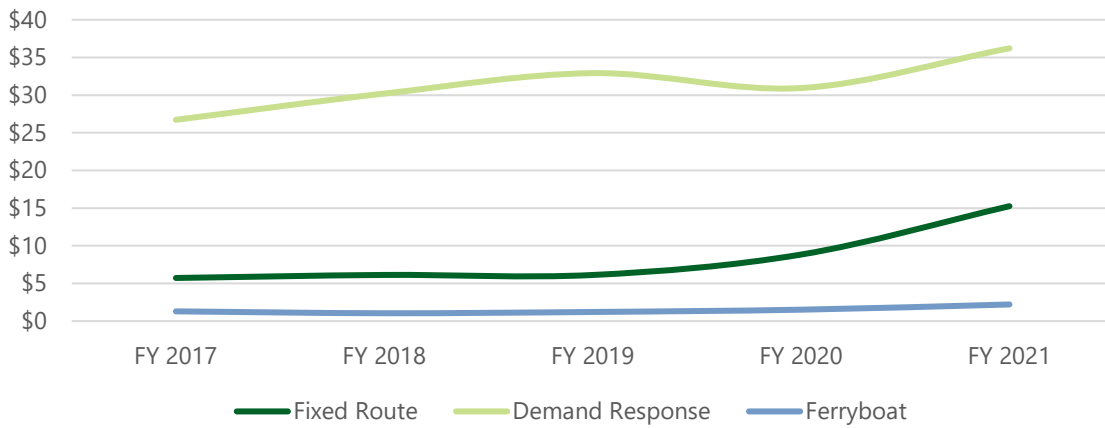


Figure 13. Operating Cost per Passenger Trip by Year



Performance by Route

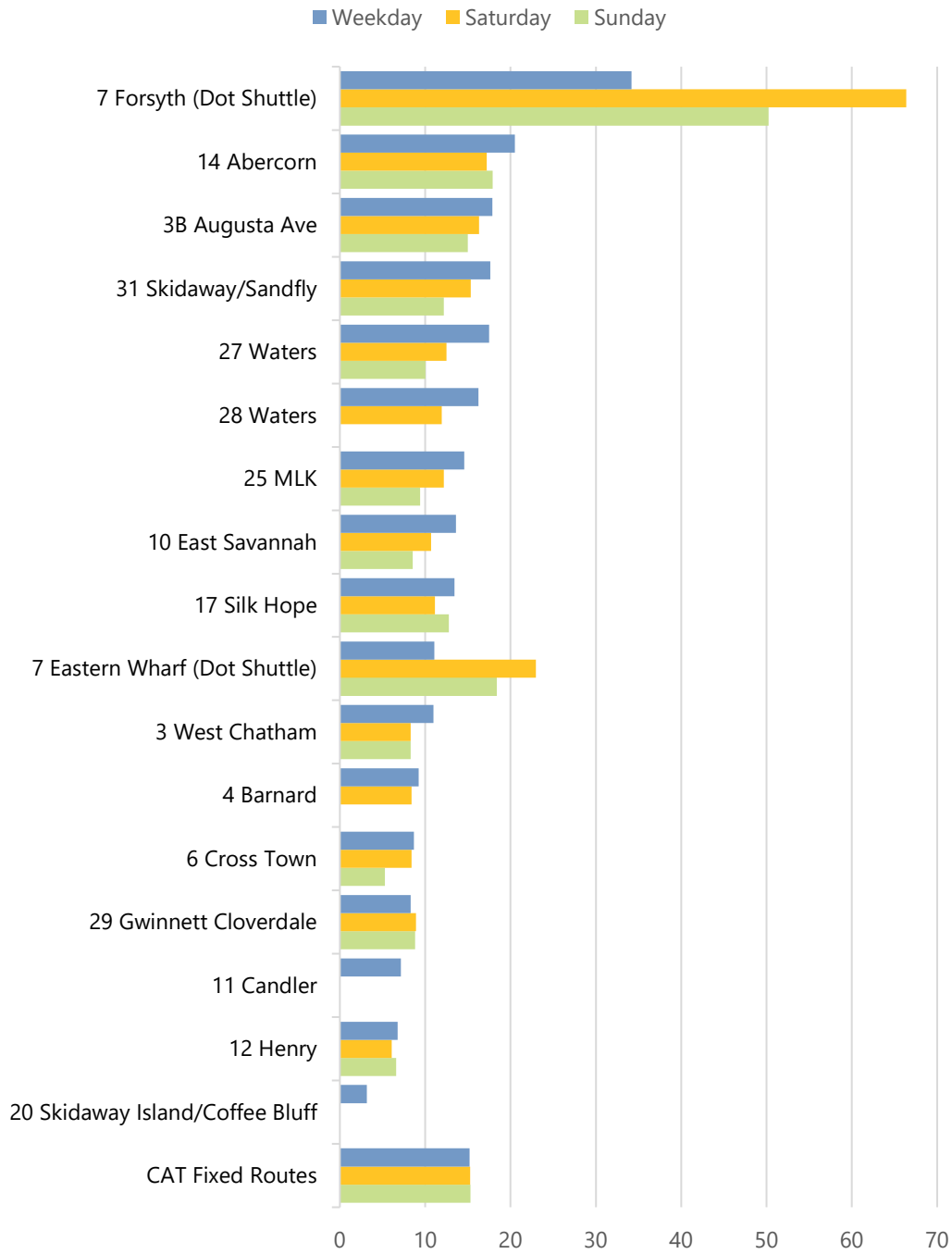
It is also useful and informative to consider these performance metrics by route to understand how service levels impact ridership. Ultimately, performance metrics are used to identify areas for investment and improvement.

Passenger Trips Per Revenue Hour by Route

Figure 14 shows passenger trips per revenue hour of service. Route 14 Abercorn, which had the highest ridership overall (see Figure 6), has the second highest riders per revenue hour. Route 7 Forsyth (dot Shuttle) has the highest riders per revenue hour because the service carries more riders relative to the amount of service being provided.

The highest riders per revenue hour in the transit system occurs on the Route 7 Forsyth (dot Shuttle) Saturday service, which carries an average of 66 riders for every hour of service. Overall, the CAT bus network is equally efficient in terms of riders per revenue hour on weekdays, Saturdays, and Sundays despite offering much less service on weekends (especially on Sundays).

Figure 14. Average Daily Passenger Trips per Revenue Hour by Route



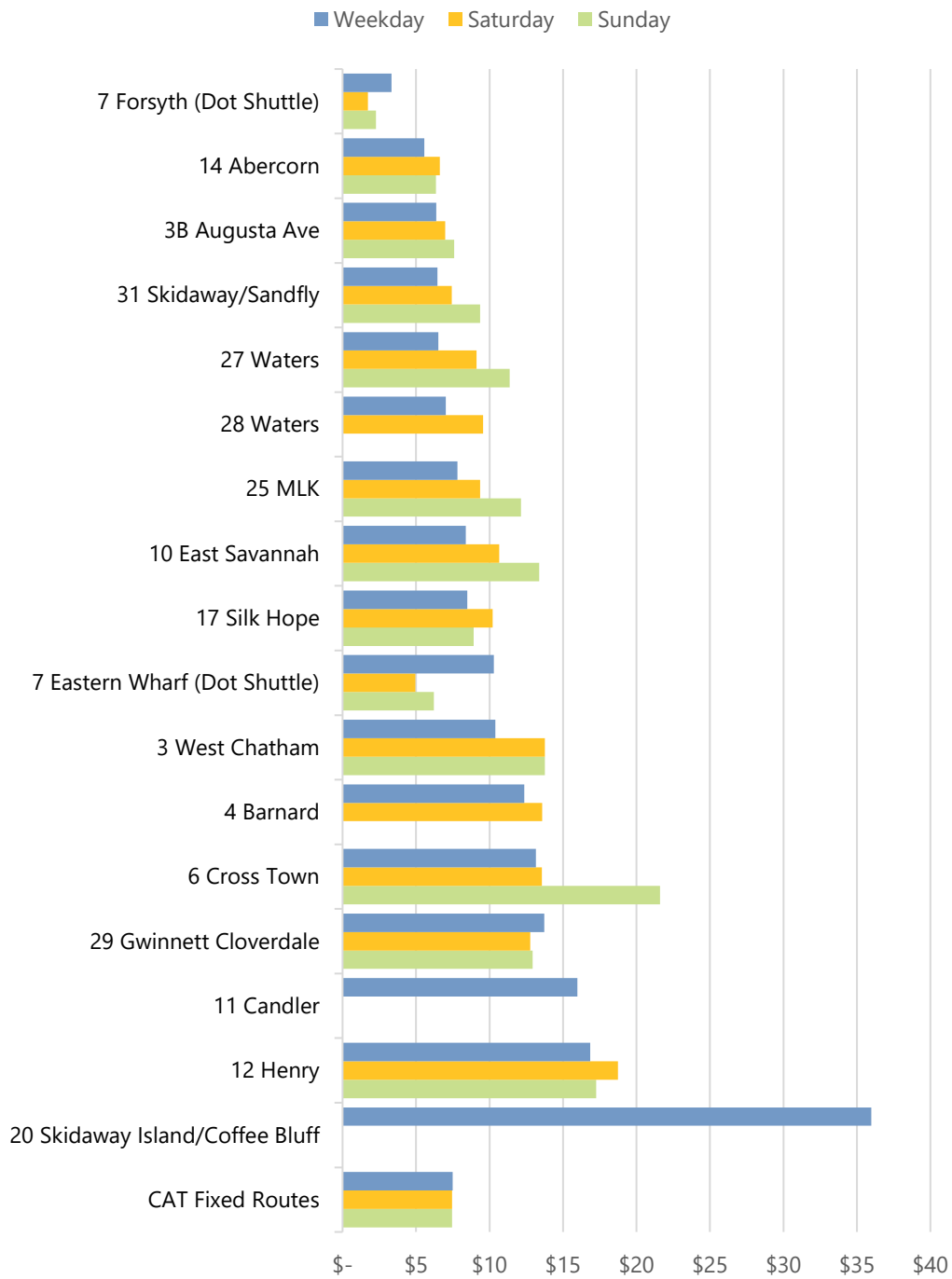
Source: WRA COA/TDP

Cost per Passenger by Route

Another way to evaluate individual routes is to consider the cost per passenger by route (see Figure 15). The results show that Route 7 Forsyth (dot Shuttle) and 14 Abercorn are the two most efficient routes in the transit network. CAT spends about \$3.34 per rider on Route 7 Forsyth and \$5.56 per rider on Route 14 Abercorn. Route 3B Augusta Ave, 31 Skidaway/Sandfly, 27 Waters and 28 Waters are also relatively cost effective. Route 28 Waters is the strongest route that does not operate on Sundays.

Several CAT bus routes have a high cost per rider due to the low average daily ridership. Route 20 Skidaway Island/Coffee Bluff costs nearly \$36 to carry a single rider. Route 12 Henry and Route 11 Candler are also relatively expensive with both costing over \$15 per passenger, which is twice the average of the bus network.

Figure 15. Average Daily Cost per Passenger by Route



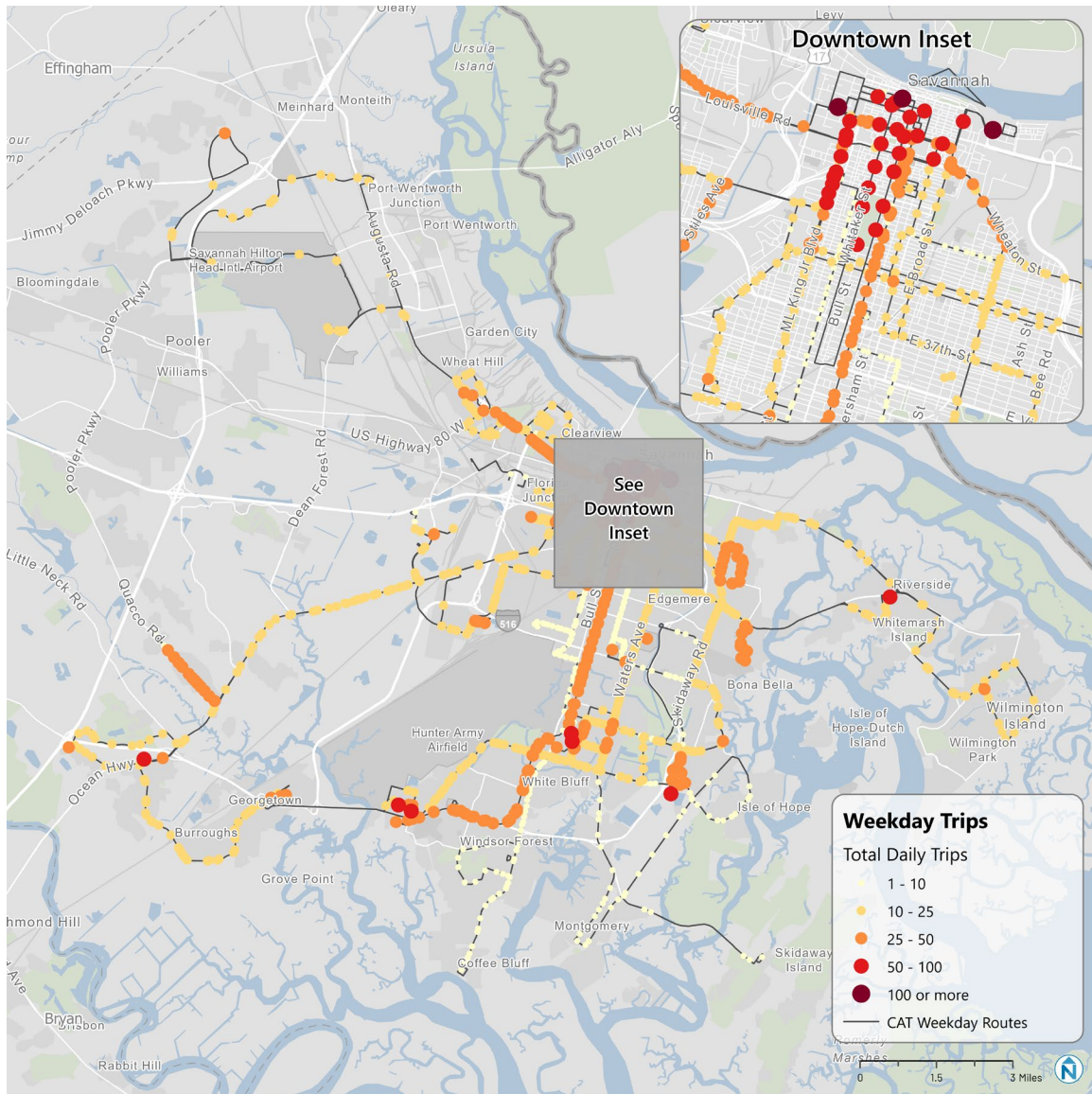
Transit Ridership and Transit Supply

Another way to look at efficiency is to understand how well the service is used compared to how much service is provided. To do this, we first consider how many times each bus stop is served by a bus over the course of a day. Figure 16 shows how many times a CAT route serves bus stops on weekdays. Weekend service can be found in Appendix A Figure 24 (Saturdays) Figure 25 (Sundays). The results show there is a lot more service in downtown Savannah (MLK King Jr Boulevard, Whitaker Street, and Drayton Street) and along key corridors such as Abercorn Street and Augusta Avenue. There is also more transit service in locations where multiple routes connect such as popular retail locations around Oglethorpe Mall, Savannah Mall, and Walmart locations.

The places with more transit service are also the places where we expect more riders. Our analysis shows that service and ridership are generally well balanced. Figure 17 shows the proportion of riders to the amount of service available on weekdays. Weekend maps are available in Appendix A Figure 24 (Saturdays) Figure 25 (Sundays). The analysis confirms some of the earlier findings – that transit is productive and well used in downtown Savannah. It also provides new insights:

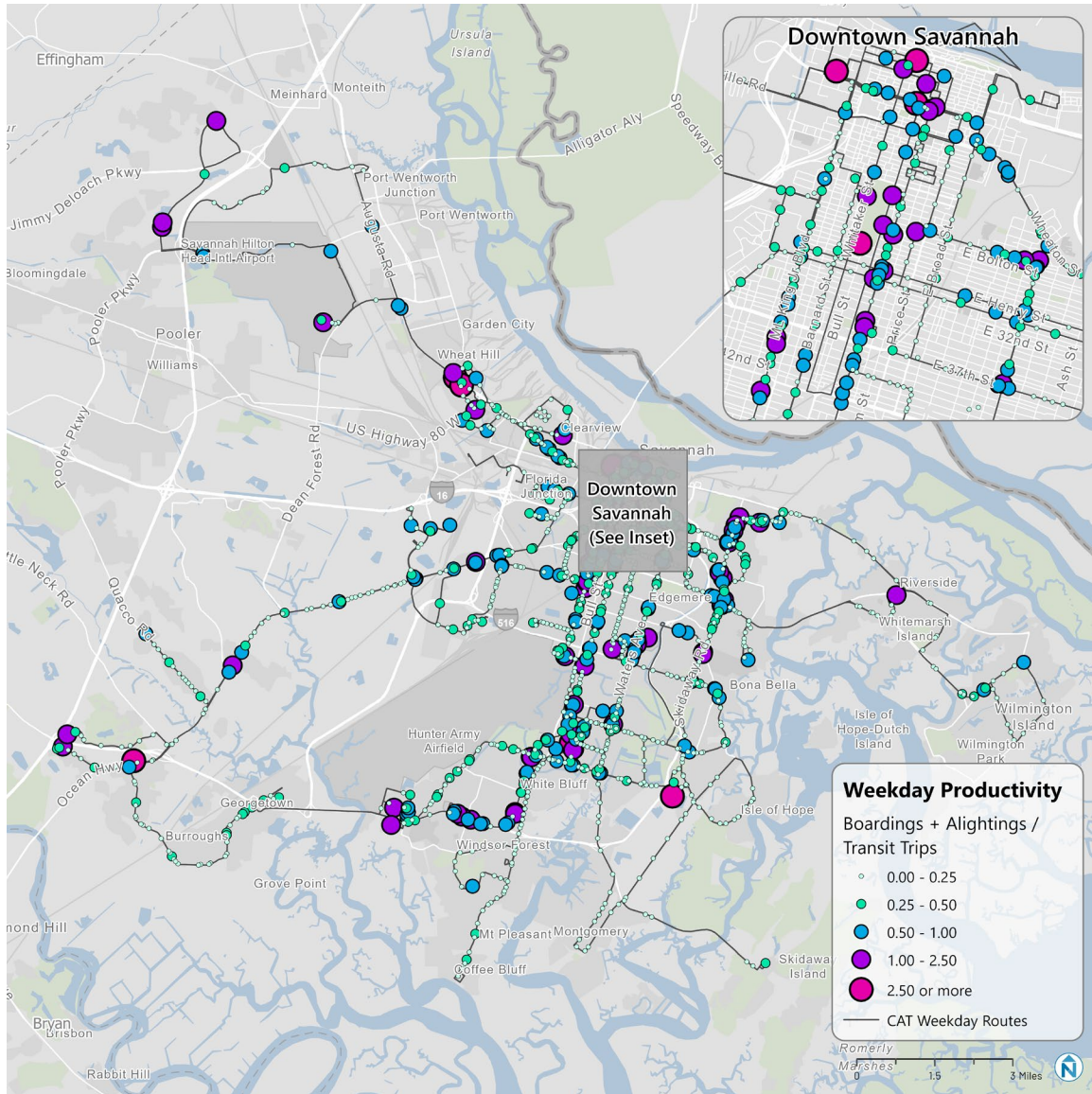
- Some areas, especially around Augusta Road and Augusta Avenue, including Chatham City, West Savannah, have very high riders per bus trip. Pennsylvania Avenue near East Savannah also has very high riders per bus trip. This analysis suggests the need for more service.
- Routes 3 West Chatham and Route 17 Silk Hope both have primarily low efficiency service but have select stops towards the end-of-lines that have very high riders per bus trip. This suggests that some stops may be removed to limit the number of times the transit vehicles stop along these routes, which may reduce the travel times.
- CAT's Sunday service, despite operating at lower levels, is nearly as productive as weekday and Saturday service. This suggests a need for more service on Sunday because riders are using the service, even when it is less convenient.

Figure 16. Weekday Transit Trips



Source: August 2022 CAT APC data

Figure 17. Weekday Ridership Activity per Transit Trip



Source: August 2022 CAT APC data

Outlook

CAT's transit network shows some challenges as well as multiple opportunities:

- Labor shortages meant that CAT had to reduce service in October 2022 to improve service reliability. CAT would like to prioritize improving service levels and system performance moving forward.
- CAT invests heavily in transit services that are oriented around the tourism market, including the dot Express Shuttle and the Savannah Belles Ferry service. Operating costs for these services are shared with institutional partners, which means CAT can operate fare free and higher levels of service.
- Outside of the dot Express Shuttles and ferry services, service levels on CAT's buses are low. Despite low levels of service, select routes perform very well, suggesting there are opportunities to increase the frequency of several routes.
- Route 14 Abercorn is CAT's most productive transit service, carrying 23% of all riders on weekdays and 17% of systemwide riders on Saturdays. It also has the most service in terms of hours and frequency. It offers the most promise for service improvements such as more frequent service and infrastructure upgrades.
- Seven "core" CAT bus routes – Routes 3, 7, 10, 17, 25, 27, and 31 carry 53% of all riders on weekdays and 61% of all riders on Saturday. Combined with Route 14, these 8 bus routes account for 77% of all weekday riders and 78% of Saturday riders.
- Ridership data shows that riders use CAT services consistently throughout the day, with high ridership from 7:00 AM to 5:00 PM. This suggests that CAT riders use bus service for more than just traditional AM and PM commute trips.
- The cost per revenue hour of service increased for all modes (fixed route, demand response, and ferryboat), but it has increased more dramatically for fixed-route bus service.
- Outside of downtown Savannah, transit ridership clusters, especially when normalized for the amount of service provided, around six critical locations:
 - Wheat Hill in Garden City
 - Island Towne Centre
 - Walmart on Montgomery Cross
 - Oglethorpe Mall
 - Savannah Mall
 - Walmart at Highway 17 and Abercorn

- CAT has opportunities to add services on several corridors during weekdays and weekend days. There are also opportunities to change service models on some corridors and places where ridership is low.

4 FINANCIAL OUTLOOK

CAT's Fiscal Year (FY) 2023 budget to operate all three service is just over \$30 million. The capital budget was set at \$20.6 million. Revenue is raised through a combination of a special service district transit tax revenue, federal grant revenue, agency revenue, passenger fare revenue, local sales tax revenue, and other local and agency revenue.

FISCAL YEAR 2023 OPERATING BUDGET

CAT's operating budget includes day-to-day costs associated with operating and maintaining transit services, including salaries and wages, employee benefits, repairs, maintenance, supplies, fuel, insurance, contract services, training, and other operating expenses. Like transit agencies nationally, the cost of operating transit services has been impacted by the broader economy, especially inflationary pressures related to labor, fuel prices, and the supply of parts and equipment. CAT's operating costs have grown on average 3.3% between 2018 and 2023, with significant variability in 2020 and 2021 due to COVID-19 salary and wage increases, hazard pay, staff shortages, and temporary service reductions.

CAT's operating budget also sets aside funds to comply with CAT's Reserve Fund Policy. This policy, adopted in April 2021, sets a goal of maintaining at least three months of budgeted expenditures or a minimum of 30% of the annual operating budget. The policy is designed to ensure CAT has stability and flexibility in the face of unanticipated external impacts, like a pandemic or spike in operating costs.

The FY 2023 operating budget is a short-term gain that allows CAT to deliver (financially) on its existing service network and strengthens CAT's position in the short-term. The stability of CAT's future operating funding, however, is not secured. Challenges, as described below, include the ability of existing revenue sources to keep pace with inflation and other factors increasing CAT's operating costs. A second challenge is CAT's reliance on short-term COVID relief funding.

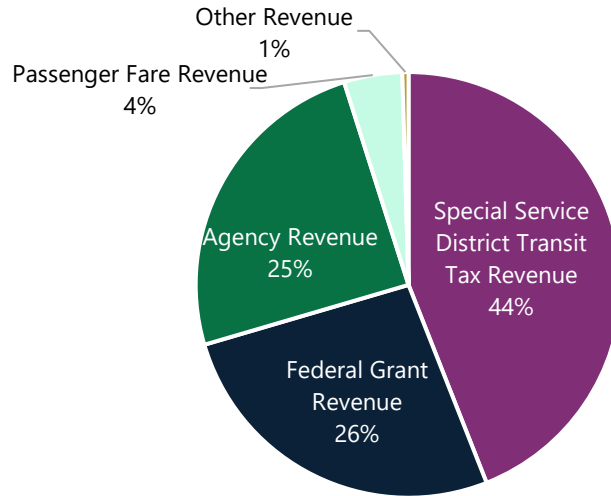
Operating Revenues

Transit agencies in the United States have different opportunities for operating and capital funds. Federal funds, for example, are more oriented towards capital investment, while



revenue to operate service is more dependent on local resources. Figure 18 shows that 44% of CAT's FY 2023 operating budget is funded by a Special Service District Transit Tax, 26% is funded by Federal grants, and 25% comes from agency revenues. The remaining 5% of revenue comes from passenger fares and other sources.

Figure 18. Operating Revenue Sources for FY 2023

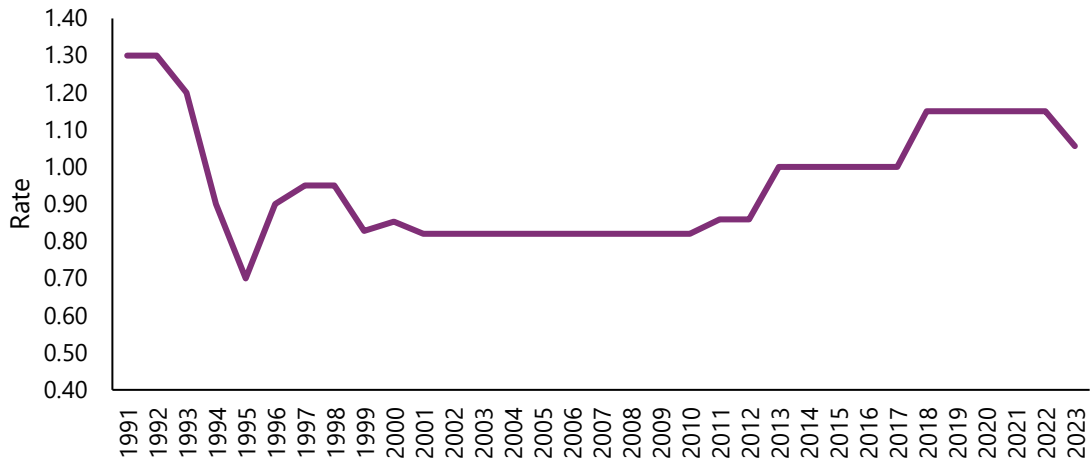


Special Service District Transit Tax

The Special Service District Transit Tax Chatham County is a property tax levied on property owners within CAT's Special Service District (SSD), which includes Savannah, Unincorporated Chatham County, and portions of Garden City. The SSD transit tax is critical and much valued source of revenue, but it also has challenges, including variations in both the taxation rate and revenue collected (see Figure 19). After holding steady for several years, the millage rate increased from 1.00 to 1.15 mills in 2017. However, in 2023, Chatham County rolled back the tax to 1.056 mills as a strategy to provide local relief from the impacts of COVID-19 and global inflation. Tax revenues are estimated at \$13.2 million in 2023, as compared with \$13.4 million raised in 2022.

However, SSD transit tax revenues will not keep pace with inflation and the higher costs of operating and maintaining CAT's service beyond 2023. Additional funding will be required to support CAT's existing services and are not sufficient to support new or expanded services.

Figure 19. Special Service District Transit Tax Millage Rate (1991-2023)



Federal Grant Revenue

Federal grants contributed \$7.9 million (26%) of the FY 2023 operating budget. Funding includes \$4.6 million in Federal Transit Administration (FTA) Section 5307 funds and \$0.2 million in FTA Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities. These grants are allocated based on formula and are expected to continue in the future, although federal funds generally do not increase annually in line with inflation.

CAT's FY 2023 operating budget also includes \$3.2 million in federal COVID-19 relief funding. These funds are left over from federal COVID-19 relief funds issued in 2020 and 2021 to address pandemic-related operating cost and revenue impacts. These funds are available to support CAT's operating budget until 2026, after which time replacement funds will be needed.

Agency Revenue

Agency revenue, earned from intergovernmental agreements and contracted services, accounts for \$7.4 million (25%) of CAT's FY 2023 operating budget. Ferry operations are funded using local hotel motel revenue from the City of Savannah, property tax revenue from Hutchinson Island, and contributions from the Westin Harbor and Savannah Trade & Convention Center. The City of Savannah also contributes funding to the dot Shuttle and Senior Circulator. Chatham County contributes funding to paratransit services. Savannah State University (SSU) funds a university shuttle service with a \$45 per enrolled student fee, paid each SSU semester. Agency revenues decreased between 2019 and 2022 due to COVID-19 but are trending toward pre-pandemic levels.

Passenger Fare Revenue

CAT charges passengers a fare to use fixed-route bus and ADA paratransit services; revenue collected from fares accounts for a total of \$1.3 million, or 4% of the FY 2023 operating budget. Other CAT services, such as ferries, the dot Shuttle, and Senior Circulator operate “fare free” and instead are funded by partner agencies (see Agency Revenues).

Passenger fare revenue dropped between 2019 and 2022, largely due to COVID-19 and CAT’s response, which included temporary service reductions and suspensions as well as temporary fare free service provided to enhance safety conditions. Passenger fare revenue, however, is slowly trending toward pre-pandemic levels.

Other Revenue

Other revenue accounts for less than 1% of the FY 2023 operating budget. This includes program revenue derived from summer passes for students and fare free employee passes for City of Savannah employees, annual shuttle service revenue (e.g., Savannah’s St. Patrick’s Day shuttle is operated annually by CAT), and other miscellaneous revenue.

FISCAL YEAR 2023 CAPITAL BUDGET

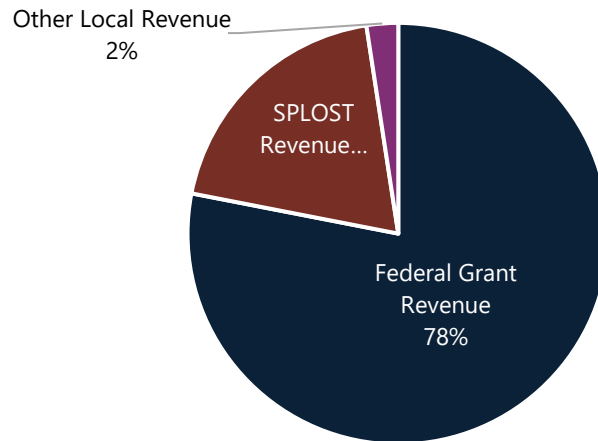
CAT’s capital budget funds vehicle purchase, maintenance and development of facilities, stations, passenger amenities (bus stops and terminals) as well as technology, security upgrades, and other capital initiatives. Unlike the operating budget, CAT’s capital budget varies from year to year, largely because capital investments reflect spending on recurring investments, like maintaining and replacing assets, which vary annually. Capital budgeting also accounts for unplanned (opportunistic) opportunities, like the availability of federal grant funding and local funding to match grants.

In FY 2023, CAT’s capital budget focuses on maintaining and improving CAT’s ferry operations, with planned ferry vessel purchases, a ferry maintenance facility, and ferry dock upgrades. It also includes funds to support the purchase of equipment and rehabilitation, renovation, and upgrades at CAT Central facility.

Capital Revenues

In FY 2023, CAT’s capital budget includes federal grants (78%), Special Purpose Local Option Sales Tax (SPLOST) revenue (20%), and other local revenue (2%) (see Figure 20).

Figure 20. Capital Revenue Sources for FY 2023



Federal Grant Revenue

Federal funds administered by the Federal Transit Administration (FTA) are available to support capital needs and are administered through a combination of formula and competitive grant programs. In FY 2023, FTA formula grants accounted for \$16.1 million, or 78% of CAT’s capital budget¹. CAT also receives capital funding through the Federal Highway Administration (FHWA) “flex” funds². Individual programs have specific requirements, with most requiring that local funds account for 20% of project costs.

With the passage of the Bipartisan Infrastructure Law (BIL) in November 2021, CAT is now receiving an estimated 30% increase in annual formula fund allocations over a five-year period (FY 2022 – FY 2026)³.

¹ Sources included FTA Section 5307 Urbanized Area, Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities, Section 5339 Bus and Bus Facilities, and Section 5337 State of Good Repair formula funds.

² Surface Transportation Block Grant (STBG) funds, Transportation Alternatives (TA), Congestion Mitigation and Air Quality Improvement (CMAQ), and Ferry Boat Program (FBP) funds.

³ The federal grant funds in the capital budget reflect planned spending, which may differ from annual formula allocations.

Special Purpose Local Option Sales Tax (SPLOST) Revenue

Chatham County levies a 1% special purpose local option sales tax (SPLOST) to fund local capital projects, including transit. CAT uses SPLOST revenues to match federal grant funding. SPLOST revenue accounts for \$4.0 million, or 20% of the FY 2023 capital budget.

County SPLOSTs require voter renewal every five or six years, are used for a variety of local capital outlay projects (buildings, bridges, roads, and more), and cannot be used to fund operations.

Other Local Revenue

Other local revenue, primarily from local partners and general operating funds, accounts for \$0.5 million, or 2% of the FY 2023 budget.

Outlook

Like many transit agencies across the country, CAT faces financial challenges over the next few years, as inflation and deferred investments mean costs are outpacing existing revenues. Budget challenges and opportunities include:

- Inflationary and labor shortage leading to increasing operating costs. The labor shortage is leading to higher wages and benefit costs and investments in employee training and development.
- Deferred maintenance of multiple facilities and assets means CAT must invest in capital projects. Key investments include CAT Central Maintenance Facility ("CAT Central"), the Joe Murray Rivers Jr Intermodal Transit Center (ITC), and ferry vessels. Postponed maintenance is increasing maintenance costs.
- Revenue sources are not keeping pace with cost increases. While fare and agency revenue are trending toward pre-pandemic levels, growth is slow. While impacts from the rollback of CAT's SSD transit tax have been minimal, the gap will increase in future years.
- Once remaining COVID-19 relief funds are fully expended (expected in FY 2026), CAT will need to secure new operating revenue to support continuation of its current services.
- Federal funding available through the BIL means CAT is eligible to compete for an unprecedented level of competitive federal grants to support capital investments. CAT's ability to leverage these funds will depend on their ability to raise local matching funds.

- One of the major challenges facing CAT is to identify a robust, predictable, and dedicated local revenue stream for transit that will help position CAT to maximize potential federal funding sources and achieve the vision identified as part of the Master Transit Plan.

5 STRENGTHS, WEAKNESSES, AND OPPORTUNITIES

CAT has a unique opportunity to rebuild its transit network and respond to a strong economic outlook with growth and development occurring throughout the region. The State of the System analysis is intended to inventory CAT's strengths, weaknesses, threats, and opportunities (see Figure 21) as the agency positions itself for future growth and development.

CAT's network has many assets, including the broader regional economy. As Coastal Georgia expands its economic base, it is fueling population growth and expanding support and service sectors. The City of Savannah – and CAT – are at the core of the region and will continue to be its largest and most important service center.

CAT also benefits from new leadership that is rebuilding trust locally and regionally. This increased trust is supporting continued partnerships with the City of Savannah and Visit Savannah. These partnerships support critical transit services such as the ot shuttle and the Savannah Belles Ferry service, which help drive agency productivity and ensure a diversified passenger base. In addition, CAT's fixed-route bus network is built around a core of strong bus routes that operate on Savannah's most critical corridors. These core services ensure residents have access to essential services and opportunities.

CAT also faces significant challenges. Driver shortages forced CAT to reduce service levels from a network that was already providing relatively low levels of service. Service reductions mean that CAT will need to rebuild its service as it looks to expand into new markets and service models. Funding is also a rapidly emerging challenge. Inflationary pressures mean costs are outpacing revenues, as CAT spends down its remaining COVID relief funds, the need for a robust, stable funding source is becoming more critical. Further, without local funds, CAT will not be able to capitalize on significant federal funding opportunities made available through the Inflation Reduction Act.



Figure 21: CAT’s Strengths, Weaknesses, Threats, and Opportunities

<p>Strengths</p> <ul style="list-style-type: none"> ▪ Regional growth – the strong regional economy is creating demand for transit services. ▪ Strong ridership base – CAT’s ridership base has remained loyal throughout changes ▪ Leadership – new leadership is building new trust in CAT. ▪ Partnerships – some of CAT’s most productive and effective services are supported by local partners, including the City of Savannah and tourism industry 	<p>Weaknesses</p> <ul style="list-style-type: none"> ▪ Low service levels – outside of a handful of services, CAT’s bus routes offer riders low levels of service overall. ▪ Aging infrastructure – CAT needs to replace ferries and invest in several existing facilities. ▪ Driver shortages – are causing a two-step challenge, by limiting the agency’s ability to deliver promised service and by driving up operating costs.
<p>Threats</p> <ul style="list-style-type: none"> ▪ Revenues – CAT’s funding sources are not keeping pace with inflation. ▪ End of COVID relief funding - as COVID relief funds dwindle, CAT will face increasing funding pressures. ▪ Sprawling land uses – mean it will be challenging to serve new fast growing areas with traditional transit services 	<p>Opportunities</p> <ul style="list-style-type: none"> ▪ Operational Assessment - CAT is studying its existing service design. This analysis should identify opportunities to optimize existing services. ▪ Concentrated performance –a handful of bus routes carry nearly 75% of all riders, creating an opportunity to focus and concentrate service. ▪ New service models – like microtransit and commuter services, combined with investments in traditional mobility services can help CAT serve new markets.

Opportunities

One of the goals of the Master Transit Plan (MTP) is to develop a strategic plan for CAT's future, positioning the agency to respond to opportunities created through local and regional growth, new transportation technologies, and lessons learned about travel needs and patterns. Key opportunities for CAT as it advances the MTP include the following:

Increased Investment in Transit Service

The State of the System and Market Analysis confirm the need for investment in transit service. The need for increased investment in transit includes more frequent service, longer hours of service, more service on weekend days (especially Sundays), and an expansion of the service area. Future investments should consider new service delivery models such as microtransit and commuter express to maximize the impact of additional funding.

Fare Free Transit

There may be opportunities for CAT to consider operating service fare free. While some transit agencies around the country have always operated select transit services fare free (for example, the dot shuttles), the practice became more widespread during the pandemic; some transit agencies have not returned to the practice of charging fares.

CAT may consider the benefits and costs of operating fare free as part of the overall Master Transit Plan. The benefits of operating fare free are clear: it helps attract riders to the system, improving the mobility in the community. More passengers on the transit network can also make CAT more competitive in certain grant programs, bringing additional funding to the system. Eliminating fares also has operational benefits associated with keeping buses operating on time and expanding access to the service.

Corridor-Based Service Investments

There are opportunities for CAT to make roadway investments on key corridors, like Abercorn Street, Waters Avenue, and Bay Street. Improvements such as signal preemption technology, bus pull outs, dedicated bus lanes, and bus on shoulder operations could help buses move faster and improve reliability. Investments in these corridors can help CAT start to build a "backbone" network that offers riders fast, frequent and reliable service. CAT could build the network around this backbone.

Passenger Amenities and Mobility Hubs

There is a need for CAT to strengthen its passenger facilities, especially at locations where lots of riders are using the system and where multiple routes connect. These improvements

are most opportune at the fringe of the network where ridership is strongest, like shopping centers, Walmarts, and hospitals.

There are also opportunities for mini-hubs (or super stops) and/or mobility hubs to create places where people can transfer between different travel modes, such as parking and bus service, ferry and bus service, or bicycle and transit. The need and opportunities for these types of hubs will increase as CAT invests in new transit modes (see microtransit and express bus).

New Service Models: Microtransit

Some parts of the CAT service area show a strong need for transit, either because the neighborhood has been historically disadvantaged and/or there are concentrations of individuals with low income and/or minority residents. In some cases, the land uses in these neighborhoods make traditional fixed-route transit inappropriate. There are opportunities to consider new service models, such as microtransit. Microtransit adapts the technology and service models used by ride-hailing companies, like Uber and Lyft, for public transit to expand coverage and improve flexibility for passengers.

New Service Models: Commuter and Express Bus

The Coastal Georgia region is growing rapidly, fueled by employment growth. While there continues to be strong growth in Savannah and Chatham County, employment is moving west and northwest of Savannah. There is a strong need, expressed by multiple stakeholders and demonstrated in the Market Analysis, to find opportunities to connect workers with jobs. Transportation services are necessary to ensure employers have access to workers, but also to ensure regional residents have equal access to opportunities.

CAT could play an important role in supporting economic development and equal access to opportunity with commuter services focused on key employment markets. To be useful and cost-effective, services should be tailored to work schedules (days of the week and times of the day) and connected to key residential areas, recognizing that the region's largest employers will draw workers from a broad geographic region.

Mobility Services / Transportation Demand Management

Coastal Georgia's economy is diversifying geographically as industrial parks and warehouses, move west and northwest. The area is also diversifying in the types of industries moving to the region and types of jobs available. Given the range of employment types and the size of individual job sites, it will not be cost-effective to serve all (or even most) of the job sites with commuter or express bus service. In addition, driver shortages also suggest that investing in bus service across multiple fronts will be challenging.

Recognizing the cost, time, and labor demands of starting new commuter bus services, CAT could consider transportation demand management (TDM) or mobility type services to support access to employment. TDM solutions include strategies such as vanpools, carpool matching programs, and support services like Guaranteed Ride Home. These solutions typically lower cost services and can help individuals access jobs in the short term.

Bus on Shoulders

Another strategy to connect workers and jobs is to operate commuter or express bus services on highway “shoulders”. This strategy allows transit buses to use breakdown lanes on a highway to travel at or near free-flowing speed through congested arterials and freeway routes. The strategy could help CAT offer reliable and competitive travel times for commuter bus services. There are multiple examples of “bus on shoulder” programs nationally, including in Pinellas County, Florida, San Diego, California, and Minneapolis, Minnesota. This program would require partnership with the Georgia Department of Transportation (GDOT).

Partnerships

Another area of opportunity for CAT is partnerships. Stakeholder interviews and the State of the System analysis demonstrate the success of existing partnerships (Belles Ferry Service and Visit Savannah) and the need for more services.

Partnerships with the highest potential in the short-term include other regional transportation service providers, such as the Savannah-Chatham County Public School System and the Coastal Regional Commission (CRC). In both cases, the opportunity for increased partnerships is multi-fold, including sharing resources such as drivers, jointly operated training programs, and developing shared mini-hubs or mobility hubs.

There are also opportunities for partnerships with major employers and institutions (especially regional emerging manufacturing) and help design and tailor transportation services to specific needs and share the cost of operating these services by forming public private partnerships. Higher education provides another promising avenue for partnerships, as Savannah is home to several colleges and universities.

Simplified and integrated technology

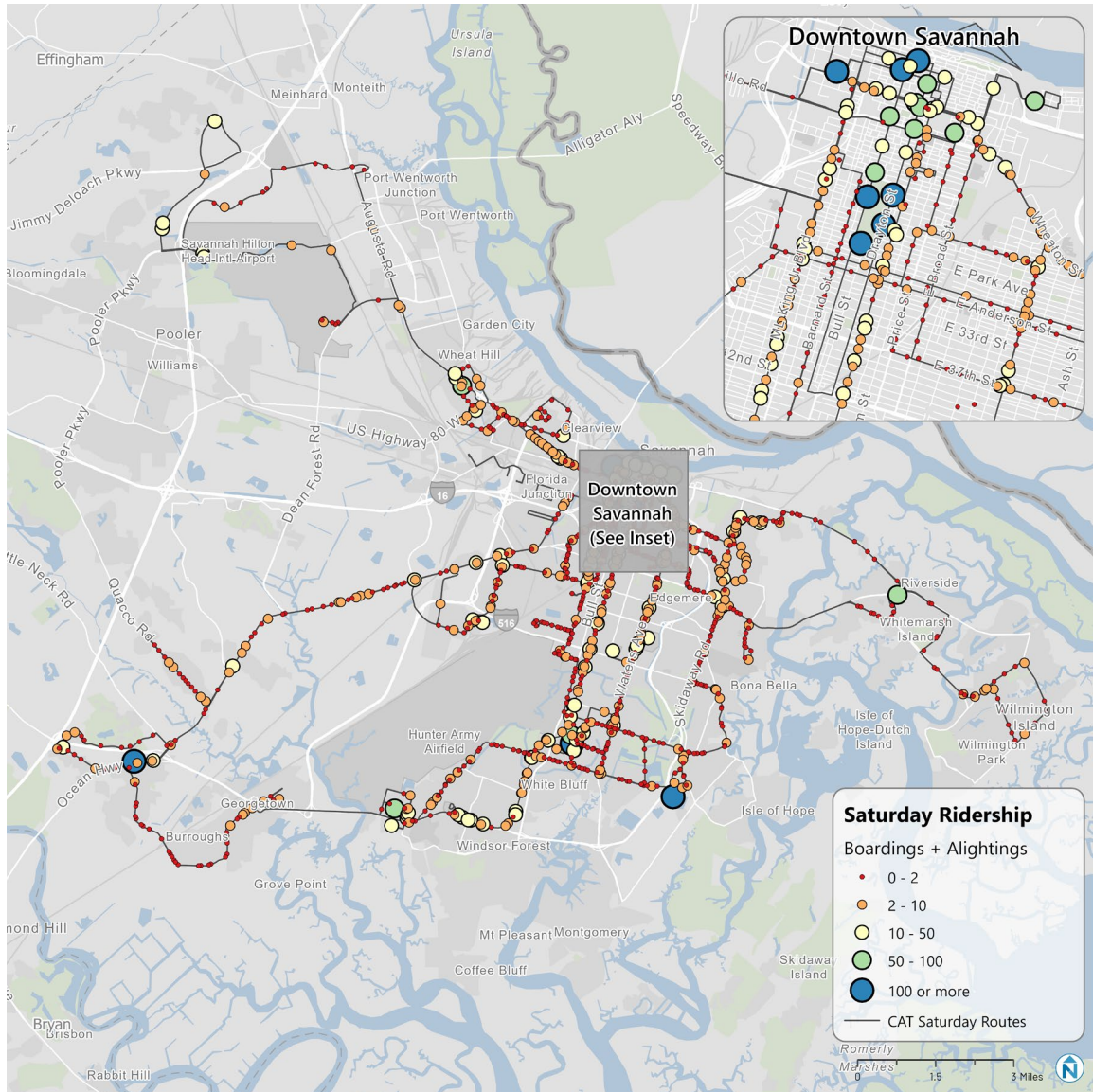
CAT has invested in a variety of technologies including technologies and systems aimed at making it easy to understand and use transit. Currently, CAT offers two primary smart phone apps – one to plan and track services and another for mobile ticket payments. As CAT considers expanding information and services available through smart phone apps, it should consider consolidating and integrating systems, so they are as simple and streamlined as possible for riders.

Transit Oriented Development and Land Use / Development Coordination

The region's rapid growth has led to dispersed and sprawling land uses, which are difficult to serve with transit. An opportunity for CAT, therefore, is to guide and encourage transit-oriented development locally on corridors in the City of Savannah and/or regionally with as new projects are developed and built. The goal with these projects would be to address the land uses, pedestrian facilities, and site designs to make them more interconnected, less auto-oriented, and more easily served by transit. As compared with some of the other opportunities, outcomes associated with this strategy are slower to accrue but help encourage structural changes with lasting impacts.

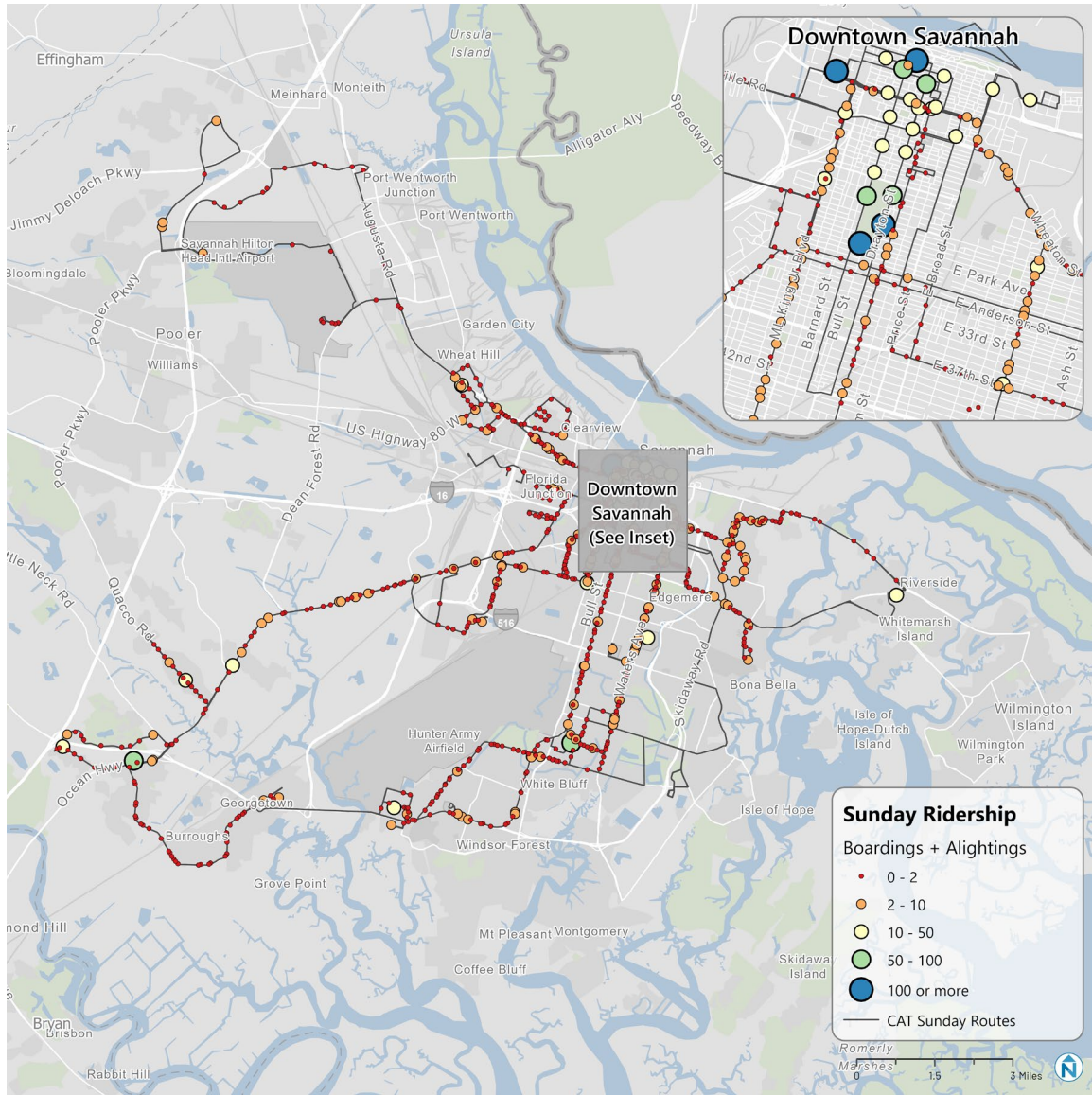
6 APPENDIX A: MAPS AND FIGURES

Figure 22. Average Saturday Ridership Activity



Source: August 2022 CAT APC data

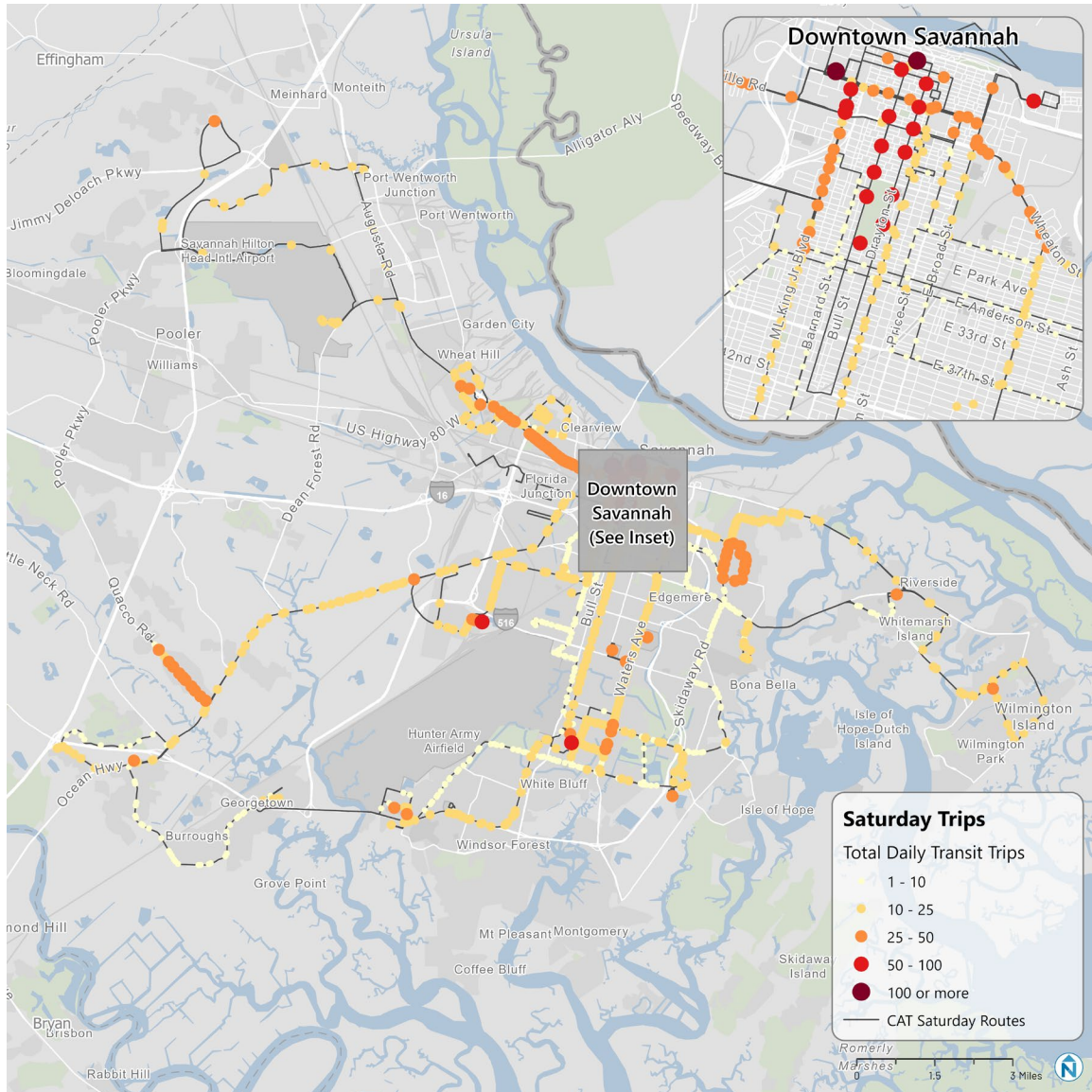
Figure 23. Average Sunday Ridership Activity



Source: August 2022 CAT APC data

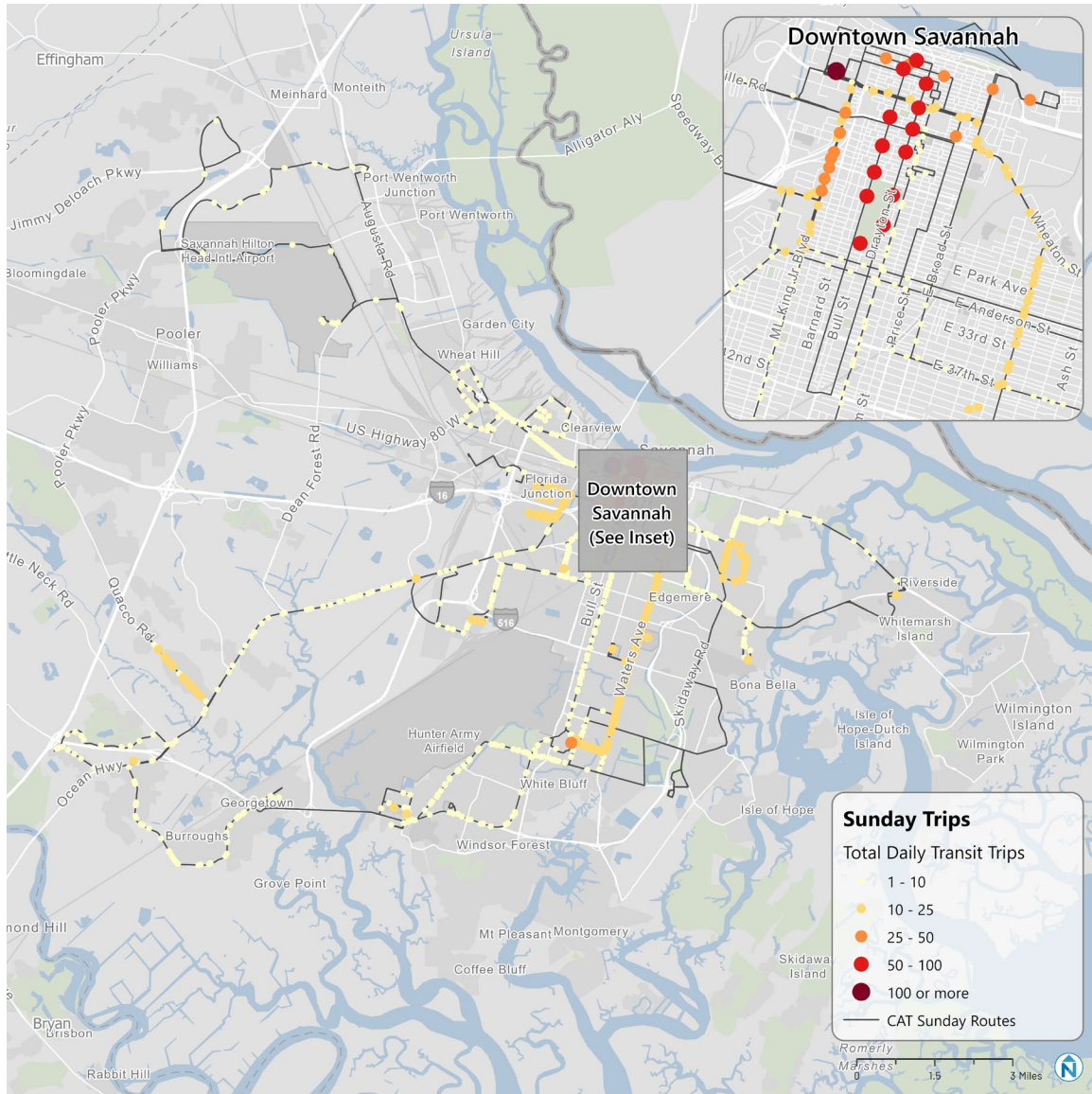
Note: Sunday data unavailable for Route 31 during August 2022

Figure 24. Saturday Transit Trips



Source: August 2022 CAT APC data

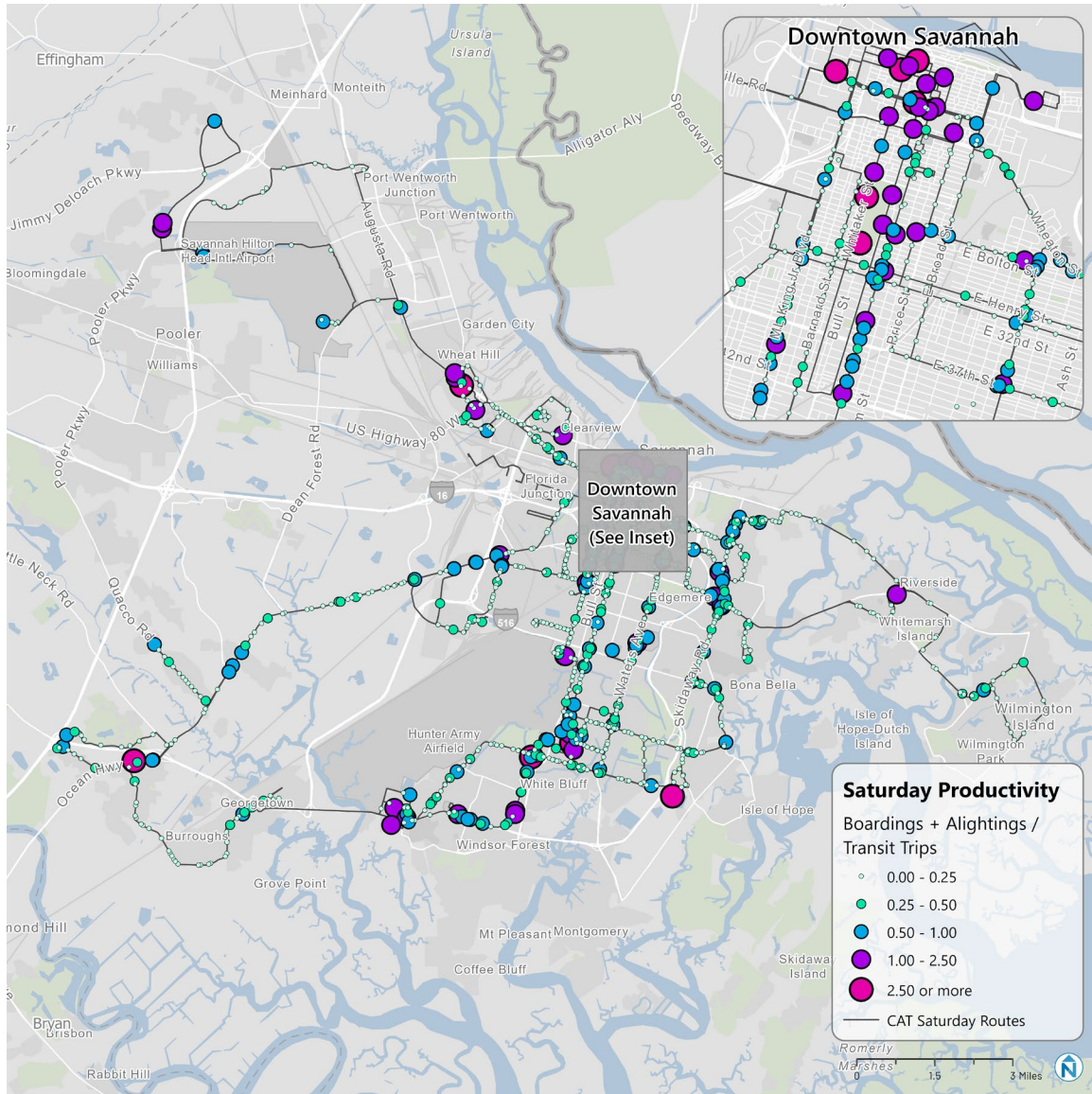
Figure 25. Sunday Transit Trips



Source: August 2022 CAT APC data

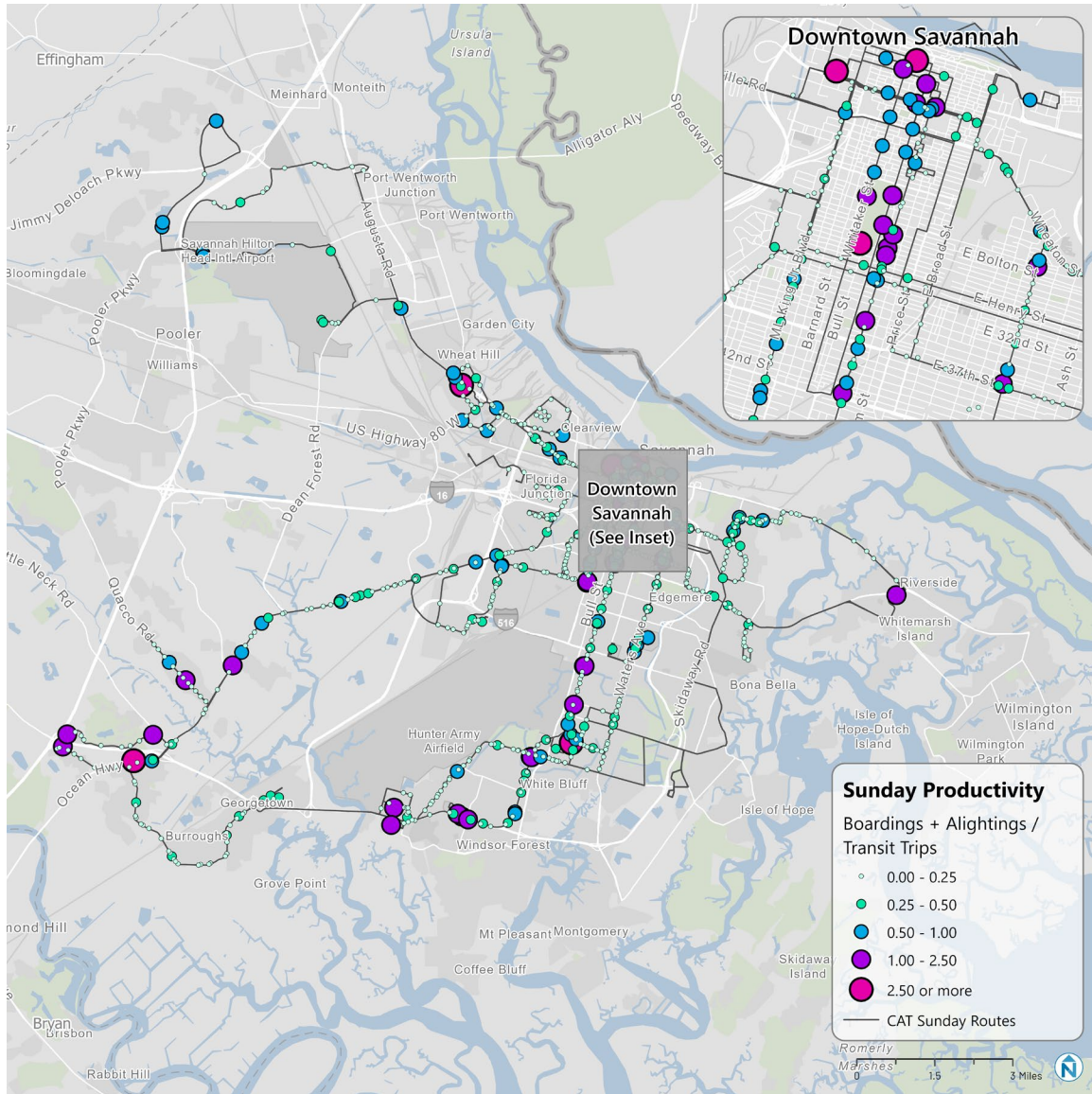
Note: Sunday data unavailable for Route 31 during August 2022

Figure 26. Saturday Ridership Activity per Transit Trip



Source: August 2022 CAT APC data

Figure 27. Sunday Ridership Activity per Transit Trip



Source: August 2022 CAT APC data

Note: Sunday data unavailable for Route 31 during August 2022

7 APPENDIX B: STAKEHOLDER INTERVIEWS

As part of the Master Transit Plan, the consultant team conducted interviews with key stakeholders in the City of Savannah, Chatham County and surrounding region. We used these interviews to discuss regional transit needs and opportunities and gauge stakeholder perceptions and interests. Findings are summarized here and were incorporated throughout the State of the System Report. In all cases, the study team conducted interviews confidentially, so individuals would feel free to speak freely. Accordingly, findings are summarized across all interviews. A list of the organizations interviewed is included at the end of this section.

KEY FINDINGS

Confidence and Excitement about New Leadership at CAT

The stakeholders expressed their excitement about CAT's new Executive Director (Faye DiMassimo). People noted she brings a fresh approach, and they are excited to support her. One of the recurring comments regarding the new Executive Director is that they have the sense she'll get things done, which is what they are looking for.

Importance of CAT to the Tourism Industry

Several stakeholders commented on the importance of CAT to Savannah's tourism industry, which is one of the biggest and most important parts of Coastal Georgia's economy. Stakeholders mentioned both the dot shuttle and the Belles Ferry as critical to the local economy, both for workers and tourists.

Partnerships

In general, stakeholders are interested in partnering with and working with CAT. Several stakeholders (such as the tourism industry and CRC) have existing partnerships, while others (such as the Savannah-Chatham County Public School System) express interest in creating a new partnership. For some stakeholders, this desire to partner is new and reflects on the new Executive Director. Specific partnership opportunities include the following:

- CAT's partnership with the tourism industry to provide the Belles Ferry service is a huge advantage. Specifically, partners appreciate the ability to modify the times and drop-off locations.

- The school district, for example, would love to collaborate more with CAT, potentially sharing drivers (and/or driver recruitment and training) or setting up some “neighborhood special” service that could help increase the accessibility of choice schools and extra-curricular activities without relying on yellow school buses.
- There may also be opportunities to partner with CRC on demand response service. They are open and willing to partner, potentially providing some ADA or demand response services for CATs in places that are outside of the core of their service area.
- Additional potential partnerships include coordinating with existing service providers through technology and other systems, like fare payment and/or scheduling software.

Existing Service Needs to Updated

Stakeholders would like to see the both existing service improved and new services added. There is a sense that the “regular” (outside of dot shuttles) bus services are slow and inefficient. Stakeholders would like to see CAT invest in the fundamentals, creating safe, reliable, and convenient transportation. CAT could also invest in better amenities such as bus stops and shelters that have lighting, seating, shelter, and phone charging. In addition to improving the existing services, new services and new places could be served to help build the system.

Serve Regional Employment

One of the most consistent and loudest concerns voiced was employment. Every stakeholder interviewed mentioned the importance of transportation to the regional economy. If the region wants to keep growing, it needs to figure out to get people to jobs that are being added all over the region. Some large employers say they must pay people more to work in locations that are further afield and/or they have made shift adjustments to retain workers. The elephant in the room is the new Hyundai facility that will require approximately 8,000 employees. It is essential that the new employees can get to the site reliably and transit should play a role in this. Hyundai is expected to open in 2025.

The existing regional service provider (CRC) already provides some employment and tourism related services and shuttles. For example, they have provided service to hotels and restaurants in Jekyll Island and in the past have offered service to Tybee Island. These services could be coordinated with any potential future services offered by CAT.

Several stakeholders mentioned the park and ride lot service operated by MARTA as part of the solution. People were also open to employer-based programs, like vanpool. One stakeholder noted, “it’s like our energy policy, the answer is all of the above – we need everything to service our needs.”

CAT could benefit from a Public Relations Firm

Several stakeholders also mentioned the need to change the perception of transit. They talked about people, including elected officials, being opposed to transit because of the fear that riders will use the bus to commit crimes. CAT could leverage a public relations firm to help quell those fears.

Access to information was also cited as a need. Some stakeholders felt that their constituents know about CAT and that it exists, but they didn't have a great understanding of how CAT services work.

Microtransit / Mobility on Demand

Several stakeholders were intrigued with the concept of microtransit or mobility on demand (MOD). This was especially true for agencies and organizations where there are potential opportunities to share services, like programs and services for people with disabilities.

Other needs/ideas

Stakeholders are interested in trying things and considering new service models, like express bus and regional park and ride lot service. They are also interested in mobility hubs (located in the right places), bus lanes on highways, and anything to connect people with jobs. There is a sense of urgency around the topic of access to employment.

Another stakeholder suggested service connecting the Georgia Southern University campus in Statesboro to the campus in Savannah. A partnership with the university could help facilitate movement between the two campuses.

Stakeholders had mixed thoughts about vanpooling services. Some are interested in trying it again, especially given how quickly and easily it can get started. Others expressed more caution saying they had tried it before, but it never really took off.

Some stakeholders like the idea of travel vouchers – or reimbursing people for trips to/from employment in the late hours. Several felt this could be a cost-effective way to get people to or home from work.

LIST OF INTERVIEWS

The following stakeholders were interviewed in late 2022:

- Jared Downs, Vice President, Governmental Affairs, Savannah Area Chamber of Commerce

- M. Ann Levett, Ed.D. ,Superintendent, and Tammy Perkins Transportation Director, Savannah Chatham County Public School System
- Dan Masisak, Transportation Director, Coastal Regional Commission (CRC) Transit Operator
- Rafaella Nutini, Robert Marshall and Brandi Lewis, Housing Authority of Savannah (HAS)
- Melanie Wilson, Executive Director, Metropolitan Planning Commission and Metropolitan Planning Organization
- Leigh Acevedo, Business Retention and Workforce Initiatives, SEDA