

Regional Transit Development Plan

Coastal Regional Commission

Existing Conditions Report

February 2024



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List of Acronyms

| | | | |
|-----------------|---|--------------|---|
| AADT | Annual Average Daily Traffic | LEP | Limited English Proficiency |
| ACS | American Community Survey | LIHTC | Low-Income Housing Tax Credit |
| ADA | Americans with Disabilities Act | LODES | LEHD Origin-Destination Employment Statistics |
| APTA | American Public Transportation Association | LRTP | Long-Range Transportation Plan |
| ATS | Albany Transit System | MHI | Median Household Income |
| BATS | Brunswick Area Transportation Study | MPO | Metropolitan Planning Organization |
| BLS | United States Bureau of Labor Statistics | MTA | Macon-Bibb County Transit Authority |
| CAT | Chatham Area Transit | MTP | Metropolitan Transportation Plan |
| CEDS | Comprehensive Economic Development Strategy | NEMT | Non-Emergency Medical Transportation |
| CORE MPO | Coastal Region Metropolitan Planning Organization | NOFO | Notice of Funding Opportunity |
| CRC | Coastal Regional Commission | NS | Norfolk Southern |
| DAC | Disadvantaged Community | NTD | National Transit Database |
| DCA | Georgia Department of Community Affairs | RHST | Rural and Human Services Transportation |
| DCH | Georgia Department of Community Health | RITIS | Regional Integrated Transportation Information System |
| DHS | Georgia Department of Human Services | RTD | Rome Transit Department |
| DRI | Developments of Regional Impact | RTP | Regional Transportation Plan |
| EJ | Environmental Justice | SAT | Statesboro Area Transit |
| ETC | Equitable Transportation Community | SCAD | Savannah College of Art and Design |
| FHWA | Federal Highway Administration | SEDA | Savannah Economic Development Authority |
| FTA | Federal Transit Administration | SGR | State of Good Repair |
| GDOL | Georgia Department of Labor | SSTP | Statewide Strategic Transportation Plan |
| GDOT | Georgia Department of Transportation | SWGRT | Southwest Georgia Regional Transit |
| GPA | Georgia Ports Authority | SWTP | Statewide Transportation Plan |
| GSU | Georgia Southern University | SWTRP | Statewide Transit Plan |
| HAMPO | Hinesville Area Metropolitan Planning Organization | TADA | Traffic Analysis and Data Application |
| HUD | United States Department of Housing and Urban Development | TAM | Transit Asset Management |
| IJA | Infrastructure Investment and Jobs Act | TDP | Transit Development Plan |
| IRA | Inflation Reduction Act | TIP | Transportation Improvement Program |
| ITS | Intelligent Transportation Systems | ULB | Useful Life Benchmark |
| LEHD | Longitudinal Employer-Household Dynamics | USDA | United States Department of Agriculture |
| | | USDOT | United States Department of Transportation |
| | | UZA | Urbanized Area |

1.0 Introduction

In 2020, the Georgia Department of Transportation (GDOT) published the Statewide Transit Plan (SWTRP), which recommended strategies to address rural and regional transit needs across the state. In addition to stressing the need for regionalized transit service in Georgia, the plan also called for a two-pronged strategy to assist the preparation of transit development plans (TDPs) across the state.

The TDP Guidebook, published in 2021, equips regional commissions, metropolitan planning organizations (MPOs), rural transit providers, and small urban transit providers with the methodologies, resources, and data necessary to draft a TDP.

GDOT is currently implementing the second part of this strategy through the development of several Regional TDPs. With the support of the Coastal Regional Commission, GDOT is preparing a Regional TDP for Coastal Georgia.

The following SWTRP strategies directly inform this plan:

- **10.1.1.1** - Develop Transit Development Plan Guidance and Regional TDPs
- **10.2.3.1** - Regionalize Transit Service

Though the rural areas of Coastal Georgia are already served by a regionalized transit system, the TDP process will facilitate intergovernmental and interagency collaboration to further advance the access to public transit in the region. Through the development of this regional TDP, GDOT and the Coastal Regional Commission will continue the implementation of the SWTRP by identifying regional transit needs and developing a series of recommendations to improve and expand regional transit in Coastal Georgia.

1.1 Purpose and Methodology

A Regional TDP identifies transit needs and opportunities and informs future transit system investments. The TDP process assists regional commissions in developing a transit vision and evaluating transit alternatives that move communities closer to these goals. TDPs typically have a 20-year horizon and are intended to be updated on a five-year renewal cycle. Though they have a 20-year horizon, TDPs should identify achievable transit projects that can be implemented within five years.

The first part of the Regional TDP, the Existing Conditions Report, compiles current information from a variety of sources, including existing plans and studies and the latest data from agencies like the Georgia Department of Labor, the Georgia Department of Transportation, and the U.S. Census Bureau. This report documents demographic and employment trends, travel patterns, transportation options, and land use and development patterns within Coastal Georgia.

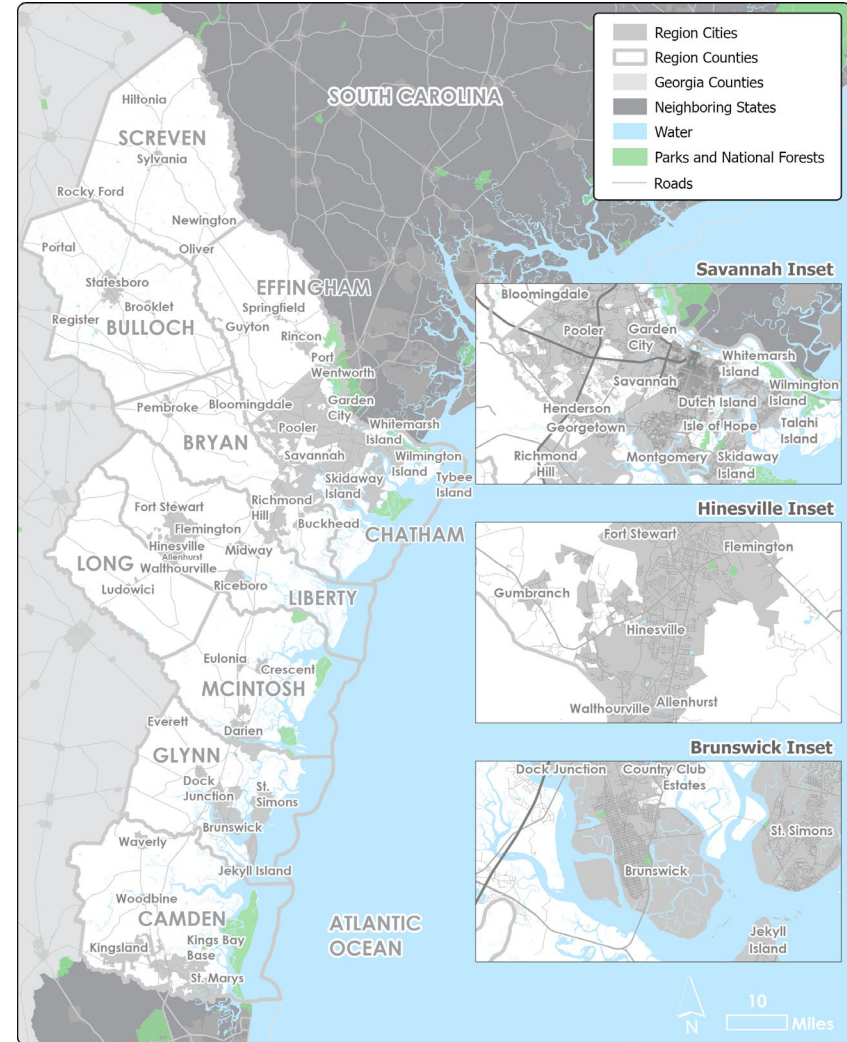
This report also includes a performance review of the region's current transit providers, their funding situation, and a comparison of Coastal Georgia transit providers to other peer transit systems in the state.

1.2 Overview of the Coastal Georgia Region

The Coastal Regional Commission comprises a ten-county area bordered by South Carolina to the north and Florida to the south. The ten counties that make up the region are Bryan, Bulloch, Camden, Chatham, Effingham, Glynn, Liberty, Long, McIntosh, and Screven counties. The City of Savannah is the region’s largest municipality. Savannah and Brunswick, in Glynn County, are home to Georgia’s two commercial port facilities, making these communities and the region a vital contributor to the state’s economy. Other major population centers include the Hinesville/Fort Stewart area in Liberty County and Statesboro, home to Georgia Southern University, in Bulloch County.

Outside of these communities, the region possesses a rural character and the areas along the Atlantic Coast have a unique topography and hydrology due to the multiple river deltas and barrier islands found in the area. These features, along with the presence of several large military facilities, can create barriers and increase trip distances across the region.

Figure 1: Coastal Georgia



2.0 Demographic Trends

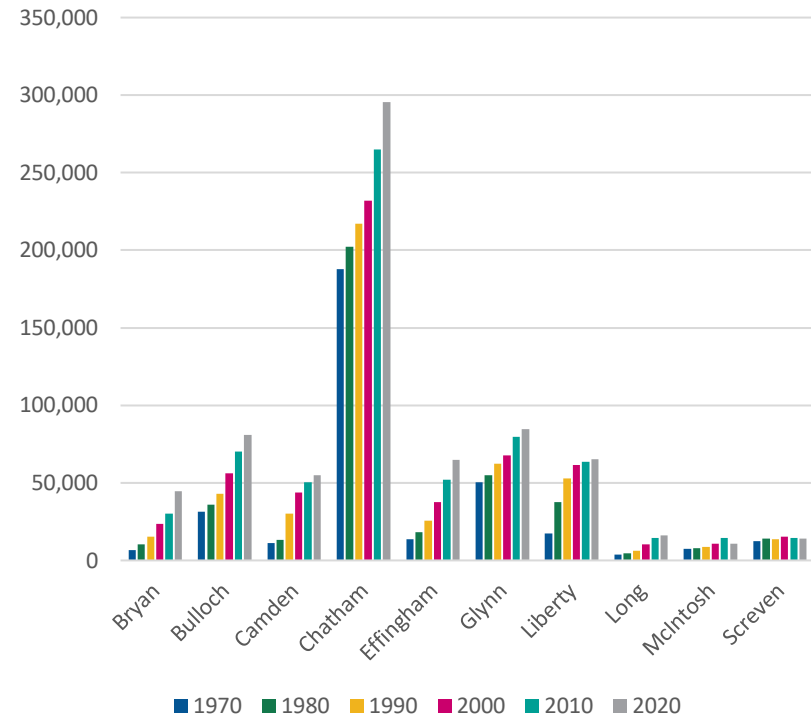
Demographic trends show growth patterns within Coastal Georgia. This section depicts historical, current, and future population trends for the region and provides a breakdown of demographic characteristics across the region.

2.1 Historical Population

Coastal Georgia’s population has grown over the last five decades, though slightly behind statewide trends. Since 1970, the region has grown 83.3 percent compared to the state’s 133.4 percent growth rate. Between 2010 and 2020, Coastal Georgia grew faster than the state at large. **Table 1** shows historical population counts and rates of change for the region and state.

Over the last decade, population growth has been strongest around the Savannah metro area. Chatham County has grown modestly (13.8 percent), while surrounding counties have seen explosive growth, like in Bryan County (51.8 percent) and Effingham County (26.3 percent). Screven County lost a small percentage of population (2.5 percent) while the population of McIntosh County contracted by 22.5 percent. In total, the region grew 14.4 percent between 2010 and 2020. Historical population trends for all counties in the region are shown in **Figure 2**.

Figure 2: Historical Population by County



Source: U.S. Census Bureau, Historical Population Change Data (1910-2020)

Table 1: Historical Population and Population Change

| Geography | 1970 | 1980 | 1990 | 2000 | 2010 | 2020 | 1970-1980 | 1980-1990 | 1990-2000 | 2000-2010 | 2010-2020 |
|-----------|-----------|-----------|-----------|-----------|-----------|------------|-----------|-----------|-----------|-----------|-----------|
| CRC | 342,662 | 399,061 | 475,271 | 558,350 | 639,459 | 731,630 | 16.5% | 19.1% | 17.5% | 14.5% | 14.4% |
| Georgia | 4,589,575 | 5,463,105 | 6,478,216 | 8,186,453 | 9,687,653 | 10,711,908 | 19.0% | 18.6% | 26.4% | 18.3% | 10.6% |

Source: U.S. Census Bureau, Historical Population Change Data (1910-2020)

2.2 Demographic Trends within the Past Decade

In the last decade, Coastal Georgia experienced consistent population growth. Between 2011 and 2016, the region's population increased by 6.6 percent, followed by 5.2 percent growth from 2016 to 2021. The most significant growth occurred in the extended Savannah metro area in Bryan (45.1 percent) and Effingham (23.3 percent) Counties. Long (19.4 percent), Bulloch (15.4 percent), Chatham (12.8 percent), Camden (8.6 percent), and Glynn (7.2 percent), also saw increases. Liberty County's population remained steady, and Screven and McIntosh counties saw decreases in population.

Please note: This report uses U.S Census Bureau American Community Survey (ACS) 5-Year data to analyze various population trends and demographic characteristics. These data are "period" estimates collected over a period of time. These datasets use different collection methods and calculation methodologies to provide more demographic detail than the Decennial Census. There may be variation in figures such as total population across datasets.

Table 2: Population and Population Change from the Last Decade

| Geography | 2011 | 2016 | 2021 | 2011-2016 | 2016-2021 |
|-----------|-----------|------------|------------|-----------|-----------|
| CRC | 647,166 | 689,672 | 725,856 | 6.6% | 5.2% |
| Georgia | 9,600,612 | 10,099,320 | 10,625,615 | 5.2% | 5.2% |

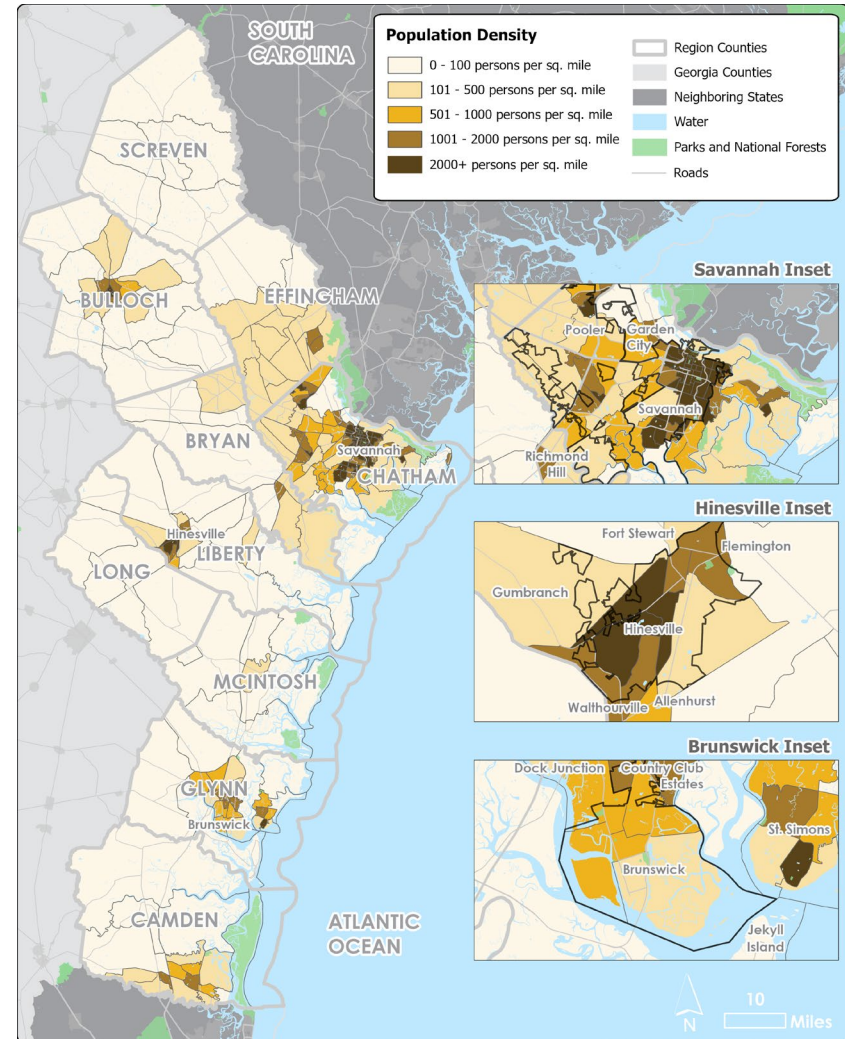
Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.3 Current Demographics

Coastal Georgia is currently home to an estimated 725,856 residents and has a land area of 5,069.5 square miles. The average population density for the region is 143.2 people per square mile. The highest concentrations are in the Savannah area, where densities reach over 9,800 people per square mile.

Most of the region's land area is rural, with low densities, including a number of census tracts, mostly military or industrial, with zero permanent residents. These tracts are in Bryan, Long, Chatham, and McIntosh counties.

Figure 3: Population Density by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.4 Transit Market Demographics

Selected demographics were chosen for analysis to find populations that could benefit from public transportation. These demographics are:

- Low-Income Population
- Elderly Population: Individuals Ages 60+
- Youth Individuals: Ages 15-19
- Zero-Car Households
- Populations with a Disability

The American Community Survey has differing methodologies for how total population is determined when a person’s status cannot be determined (such as for poverty or disability). This can lead to figures that vary from the total population presented in **Section 2.2**.

2.4.1 Low-Income

Coastal Georgia has a higher percentage of individuals classified as low income compared to the state as a whole (See **Table 3**).

Table 3: Low-Income Population

| Geography | Total Population for Poverty | Number Below Poverty | Percent Below Poverty | Median Household Income |
|-----------|------------------------------|----------------------|-----------------------|-------------------------|
| CRC | 696,979 | 104,496 | 15.0% | \$ 56,759 |
| Georgia | 10,356,895 | 1,441,351 | 13.9% | \$ 65,030 |

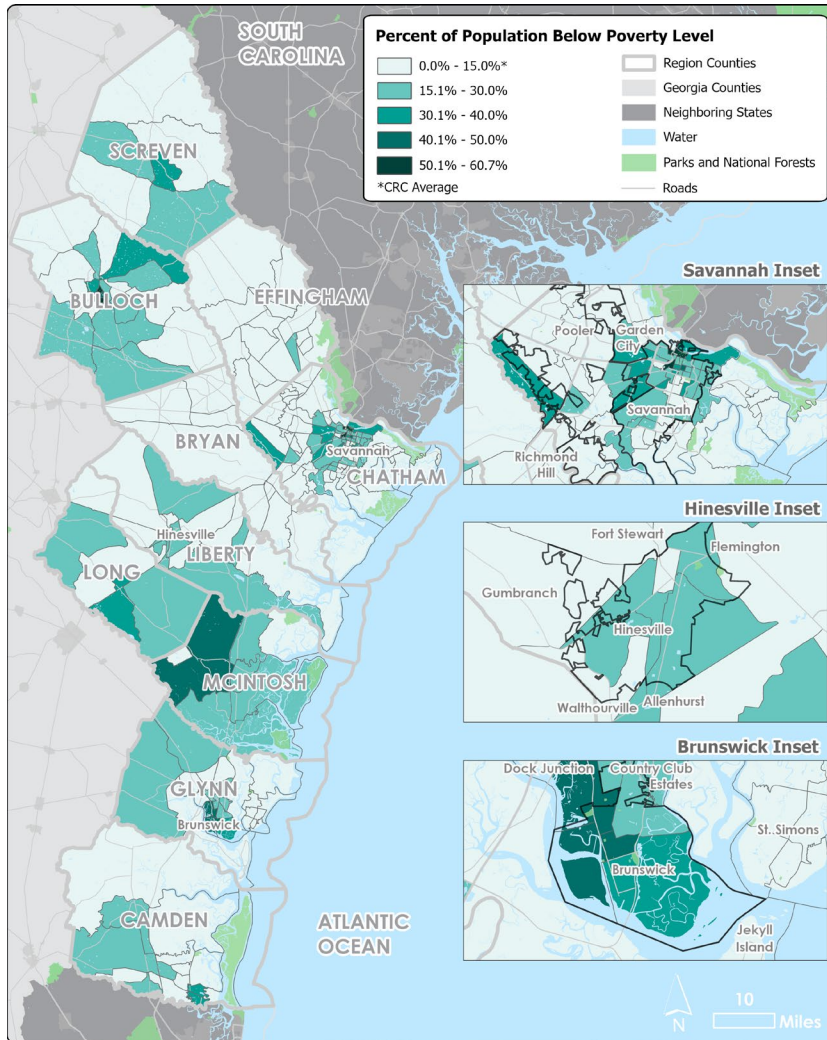
Source: U.S. Census Bureau 2021 ACS 5-Year Data: Table C17002

| Geography | Total Population for Poverty | Number Below Poverty | Percent Below Poverty | Median Household Income |
|-----------|------------------------------|----------------------|-----------------------|-------------------------|
| CRC | 696,979 | 104,496 | 15.0% | \$ 56,759 |
| Georgia | 10,356,895 | 1,441,351 | 13.9% | \$ 65,030 |

Source: U.S. Census Bureau 2021 ACS 5-Year Data: Table C17002

Figure 4 shows areas where low-income individuals are most concentrated. The Median Household Income (MHI) in Coastal Georgia is \$56,759, 12.7 percent lower than the state MHI. Two counties have an MHI above the state average: Bryan County (\$81,032) and Effingham County (\$72,279). The lowest MHI is found in the region’s more rural areas, such as Screven County (\$43,167) and McIntosh County (\$49,951).

Figure 4: Low-Income Population by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.4.2 Elderly (60+)

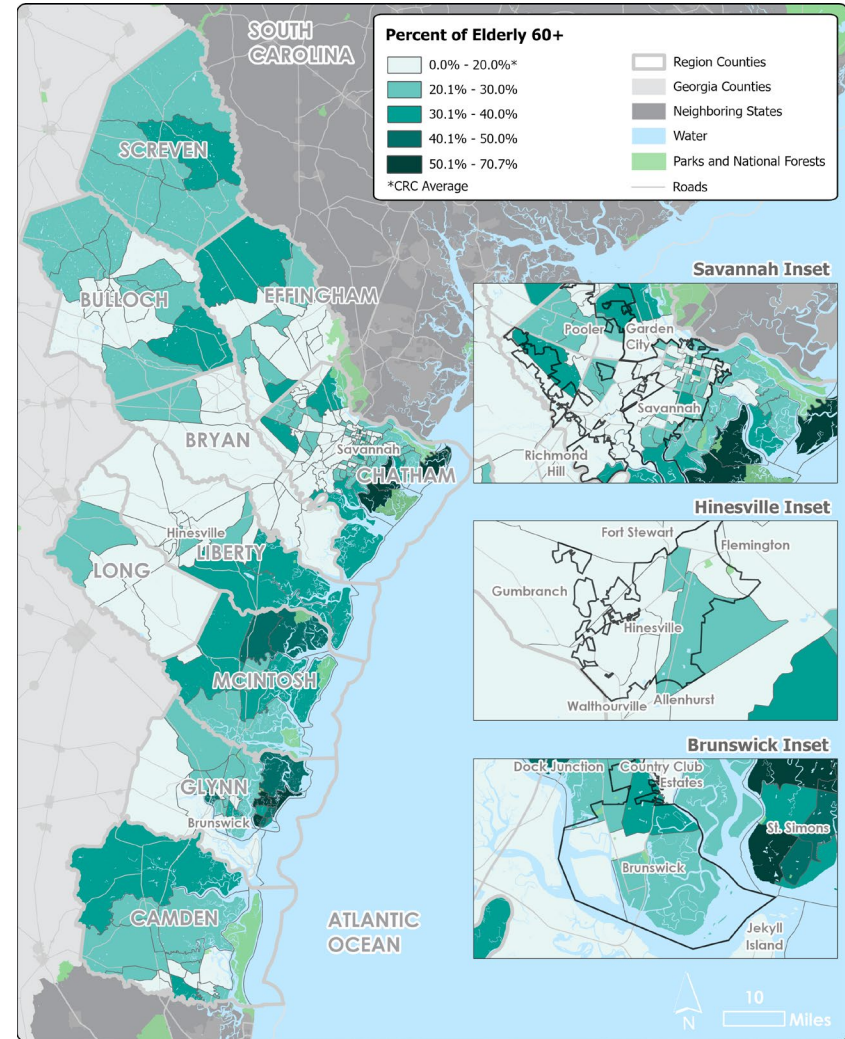
Around 20.0 percent of the region’s residents are over the age of 60, which is in line with Georgia’s overall percentage of 19.8 percent. Census tracts with higher concentrations of older adults can be found throughout the region, but the highest concentrations are found in areas known to be popular retirement destinations, such as Tybee Island in Chatham County and St. Simon’s Island in Glynn County, where some census tracts have over 70 percent of residents over the age of 60.

Table 4: Elderly Population

| Geography | Total Population | Total 60+ | Percent 60+ |
|-----------|------------------|-----------|-------------|
| CRC | 725,856 | 145,390 | 20.0% |
| Georgia | 10,625,615 | 2,102,664 | 19.8% |

Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data: B01001

Figure 5: Elderly Population by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.4.3 Youth (15-19)

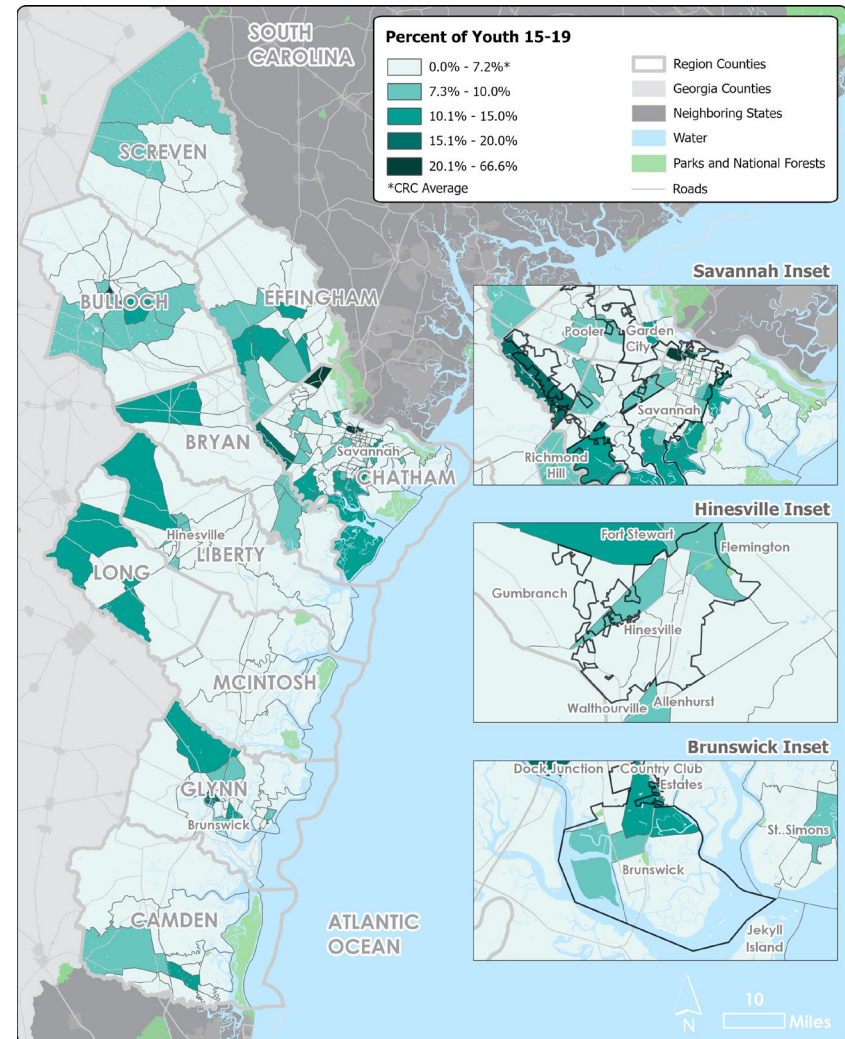
Individuals between the ages of 15 and 19 are less likely to own personal vehicles, and thus may be more reliant on public transit than other populations. Much like the region’s share of older individuals, the region’s share of youth aged 15 to 19 is on par with the state average (see **Table 5**). Areas with the highest concentration of young people tend to be in the region’s largest cities and the suburban areas that surround them. These areas can be seen in **Figure 6**.

Table 5: Youth Population

| Geography | Total Population | Total 15-19 | Percent 15-19 |
|-----------|------------------|-------------|---------------|
| CRC | 725,856 | 52,302 | 7.2% |
| Georgia | 10,625,615 | 752,682 | 7.1% |

Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data: B01001

Figure 6: Youth Population by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.4.4 Zero-Car Households

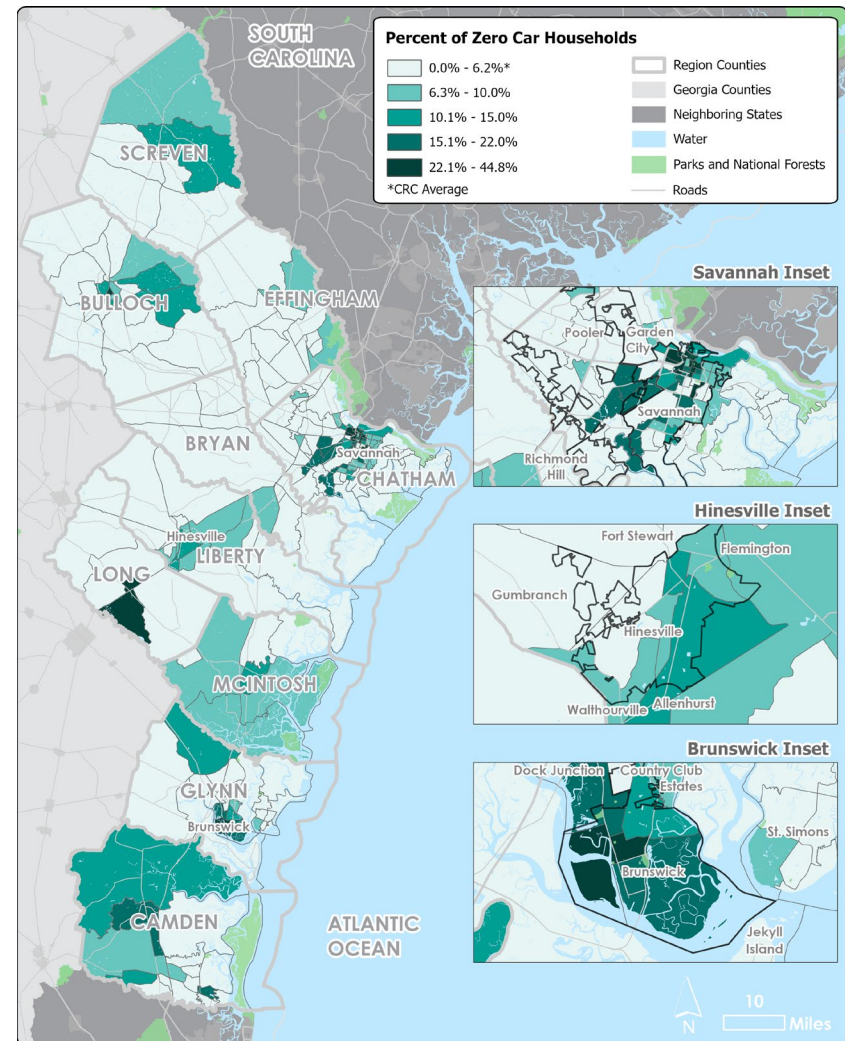
Zero-car households are households that do not have access to a vehicle for transportation. These populations may rely on transit or another form of transportation to meet their daily needs. Though the region does not have an above-average number of these households (see **Table 6**), there are areas with especially concentrated numbers of these households. As shown in **Figure 7**, census tracts in central Savannah and Brunswick both have substantially higher concentrations of zero-vehicle households, along with areas around Statesboro in Bulloch County, St. Marys and Woodbine in Camden County, and Ludowici in Long County.

Table 6: Zero-Car Households

| Geography | Total Households | Total Zero-Car Households | Percent Zero-Car Households |
|-----------|------------------|---------------------------|-----------------------------|
| CRC | 272,170 | 16,774 | 6.2% |
| Georgia | 3,885,371 | 236,209 | 6.1% |

Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data: B08201

Figure 7: Zero-Car Households by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.4.5 Population with a Disability

People with a disability may rely on transit to access destinations and provide mobility. The U.S. Census Bureau defines populations with a disability as individuals having hearing, vision, cognitive, ambulatory, self-care, or independent living difficulties.

Coastal Georgia has a higher proportion of residents with a disability (14.4 percent) compared to Georgia as a whole (12.4 percent), as shown in **Table 7**. Areas with a high concentration of residents with a disability often mirror those areas with a higher number of senior residents, and though Coastal Georgia adheres mostly to that pattern, there are differences, as well. **Figure 8** shows the areas with the highest concentration of disabled residents.

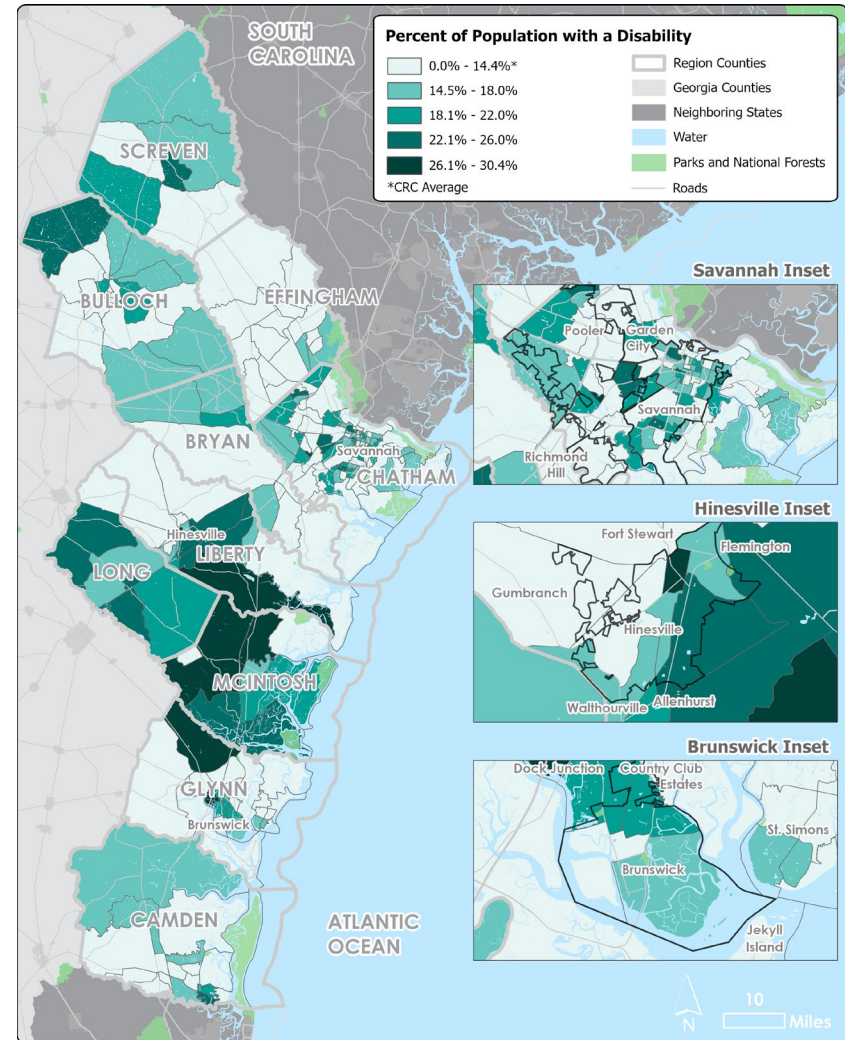
McIntosh County has the highest proportion of disabled residents (21.9 percent), while Chatham County has the highest total number of residents living with a disability (around 43,400). Effingham County has the lowest proportion of disabled residents (11.0 percent).

Table 7: Populations with a Disability

| Geography | Total Population for Disabled | Total Disabled | Percent Disabled |
|-----------|-------------------------------|----------------|------------------|
| CRC | 700,690 | 101,114 | 14.4% |
| Georgia | 10,438,528 | 1,297,020 | 12.4% |

Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data: S1810

Figure 8: Populations with a Disability by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.5 Title VI

According to Federal Transit Administration Circular 4702.1B, Title VI prohibits recipients of federal financial assistance (e.g., states, local governments, or transit providers) from discriminating on the basis of race, color, or national origin in their programs or activities. Title VI also obligates federal funding agencies to enforce compliance of these requirements. Two demographic groups covered by Title VI, minority and limited English proficiency populations, are discussed below.

2.5.1 Minority

The U.S Census Bureau defines minority as populations with an ethnicity of Hispanic and Latino and/or who identify as the following:

- Black or African American
- American Indian and Alaska Native
- Asian
- Native Hawaiian and Other Pacific Islander
- Other
- Two or More Races

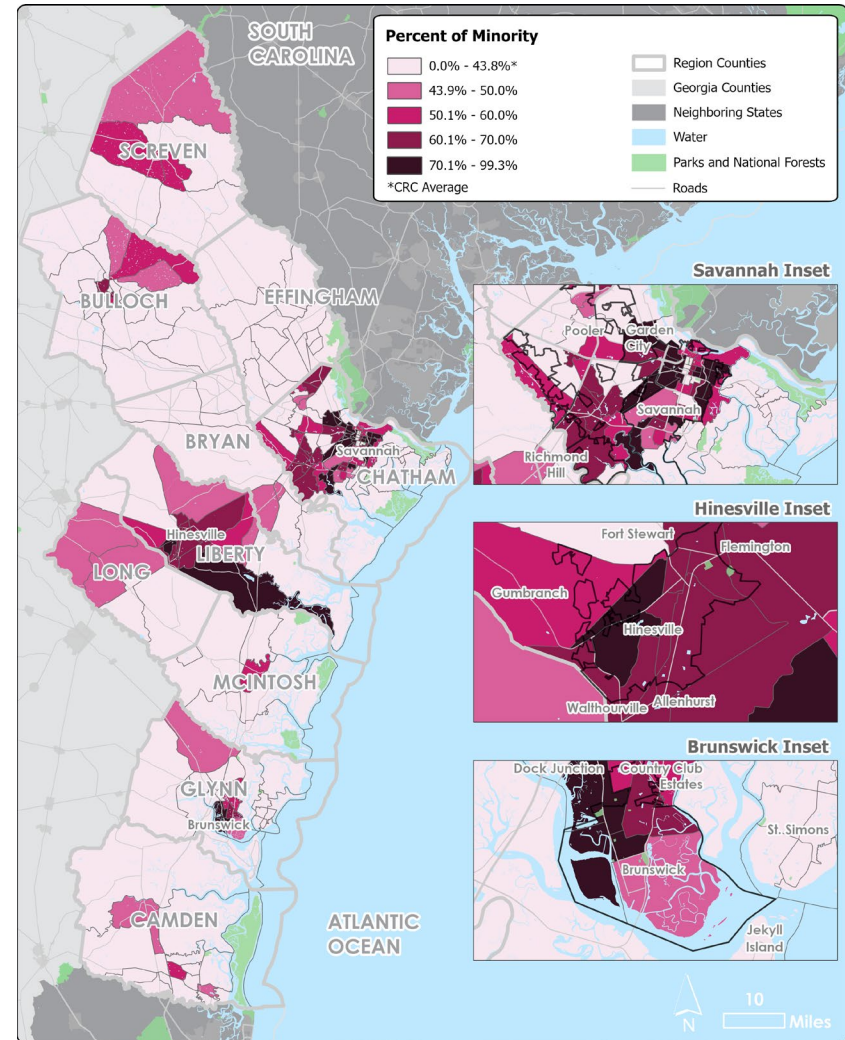
As shown in **Table 8**, Coastal Georgia’s percentage of minority residents is 43.8 percent, below the statewide average of 48.6 percent. The map in **Figure 9** shows the areas with the highest concentration of minority population within Coastal Georgia.

Table 8: Minority Population

| Geography | Total Population | Total Minority | Percent Minority |
|-----------|------------------|----------------|------------------|
| CRC | 725,856 | 318,123 | 43.8% |
| Georgia | 10,625,615 | 5,162,942 | 48.6% |

Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data: B03002

Figure 9: Minority Population by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.5.2 Limited English Proficiency

Limited English proficiency (LEP) populations are those persons who speak English less than very well (i.e., well, not well, or not at all). The U.S Census Bureau collects this information for people five years of age and older.

As shown in **Table 9**, around 2.7 percent of Coastal Georgia’s residents have limited-English proficiency, below the state average of 5.4 percent. The most common language spoken by LEP residents is Spanish, at 1.7 percent (around 11,300 residents). Other prominent languages spoken by the region’s LEP populations include Vietnamese (around 1,600 residents) and Chinese (around 900 residents).

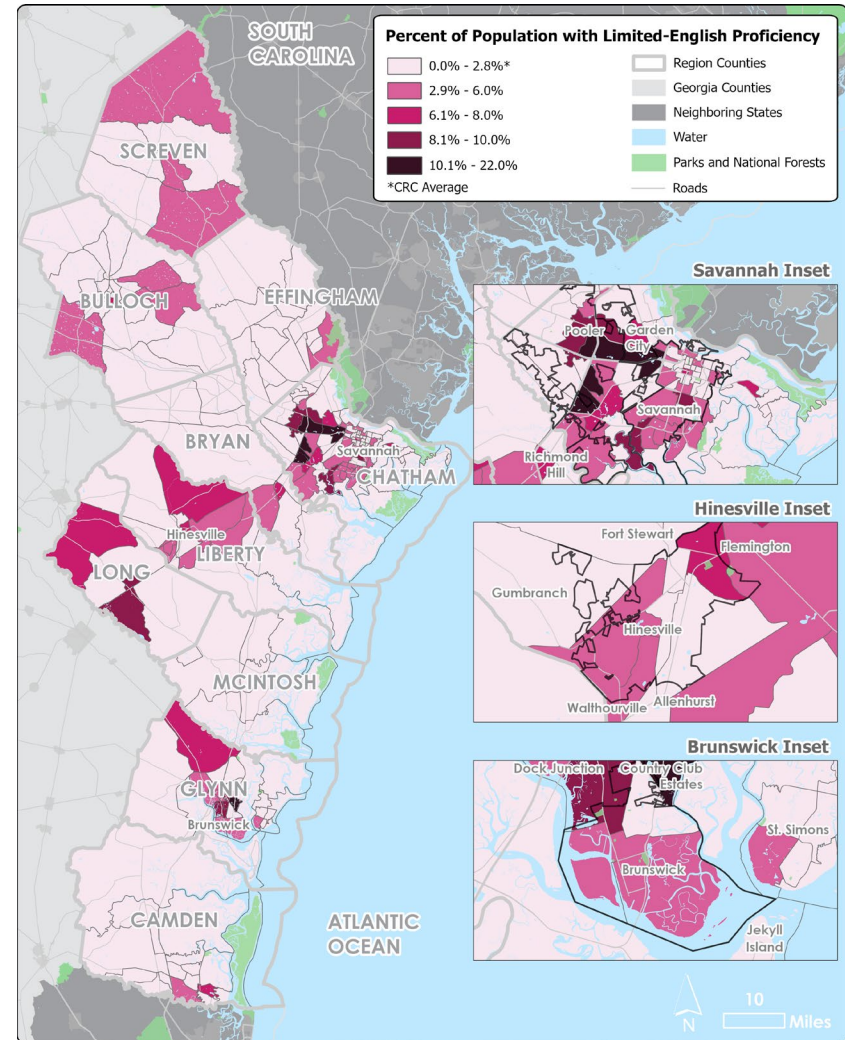
Figure 10 shows the areas with the highest concentrations of LEP residents. These areas are mostly concentrated in the urban areas in and around Savannah and Brunswick.

Table 9: LEP Populations

| Geography | Total Population Ages 5+ | Total LEP | Percent LEP |
|-----------|--------------------------|-----------|-------------|
| CRC | 679,074 | 18,117 | 2.7% |
| Georgia | 9,981,897 | 541,595 | 5.4% |

Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data: B06007

Figure 10: LEP Populations by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

2.5.3 Transportation Disadvantaged Communities

In 2021, the Biden administration issued Executive Order 14008 establishing the Justice40 Initiative, which seeks to ensure that disadvantaged communities (DACs) receive 40 percent of the overall benefits of federal investments in climate and clean energy programs, including sustainable transportation. As part of implementing Justice40, the United States Department of Transportation (USDOT) developed several tools to measure historical disadvantage across the nation. This report uses USDOT's Equitable Transportation Community (ETC) Explorer tool¹ to assess disadvantage in Coastal Georgia. This tool takes into account five components of disadvantage, with each component comprising multiple indicators. These components are:

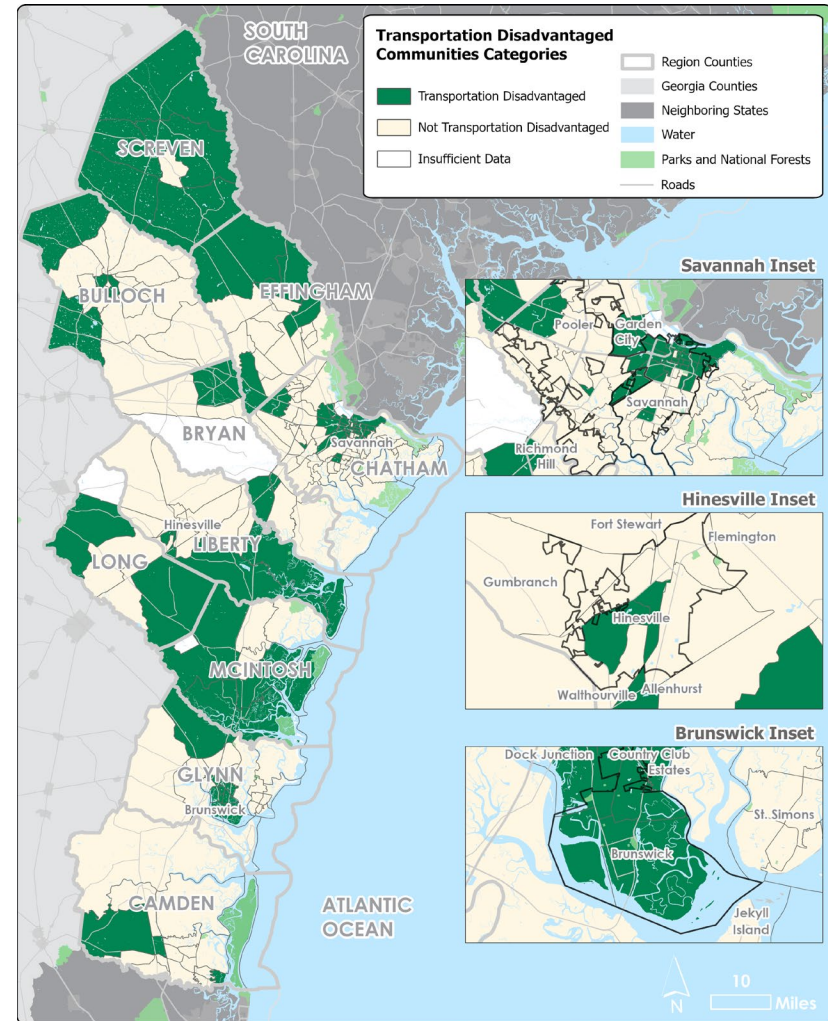
- **Transportation Insecurity:** Considers transportation access, transportation cost burden, and transportation safety to assess residents' ability to easily address their daily transportation needs.
- **Environmental Burden:** Considers sixteen environmental indicators measuring air and water pollutant exposure, proximity to known emitters of air, soil, noise, water, or light pollution, and percentage of pre-1980s housing, which is predictive of lead exposure.
- **Social Vulnerability:** Looks at twelve socioeconomic indicators that have a direct impact on a population's quality of life, including unemployment levels, housing cost burden, and lack of internet access. This component also includes many of the socioeconomic factors covered in **Section 2.4** and **Section 2.5**.
- **Health Vulnerability:** Assesses an area's frequency of health conditions by measuring the prevalence of five chronic health conditions that can be caused by environmental factors: asthma, cancer, high blood pressure, diabetes, and low mental health.
- **Climate and Disaster Risk Burden:** Measures the risk an area faces from increased chances for climate or disaster events. Indicators include anticipated changes in extreme weather, annualized disaster losses, and impervious surface percentage.

¹<https://experience.arcgis.com/experience/0920984aa80a4362b8778d779b090723/page/ETC-Explorer---Homepage/>

Figure 11 shows which tracts in Coastal Georgia are designated as disadvantaged. These designations typically follow the trends seen for many of the previously analyzed demographic factors, with disadvantaged areas most likely to be in either very urban or very rural areas.

In total, 43.5 percent of Coastal Georgia’s land area falls within a census tract that is designated as historically disadvantaged. These tracts are home to 34.8 percent of the region’s residents. Residents living within one of Coastal Georgia’s historically disadvantaged areas are 66 percent more likely to lack vehicle access than the average regional resident.

Figure 11: Transportation Disadvantages by Census Tract



emp

Source: U.S. Department of Transportation ETC Explorer Tool

2.6 Future Demographics

Population projections provide insight on the growth of geographic areas. The Georgia Governor’s Office of Planning and Budget issues a population projection series by county. Based on the 2020 Census count, these data use birth rates and other growth factors to extrapolate population for each year from 2022 to 2060. Much like the differences seen between US Census and ACS data, differences in methodology can lead to variations across datasets.

The region is projected to see robust growth over the next several decades, with a projected population of 1,044,681 by 2060, representing growth of 39.5 percent over the 2022 population. This is substantially above the state’s projected growth of 29.9 percent by 2060 (see **Table 10**).

Most of this growth is expected in the Savannah metro area, including Chatham, Effingham, Bryan, and Bulloch Counties. Screven County is projected to experience slight dips in population by 2060 but is not predicted to see the steep declines predicted for rural counties in other regions of the state. **Figure 12** displays the projected population.

Figure 12: Population Projections by County

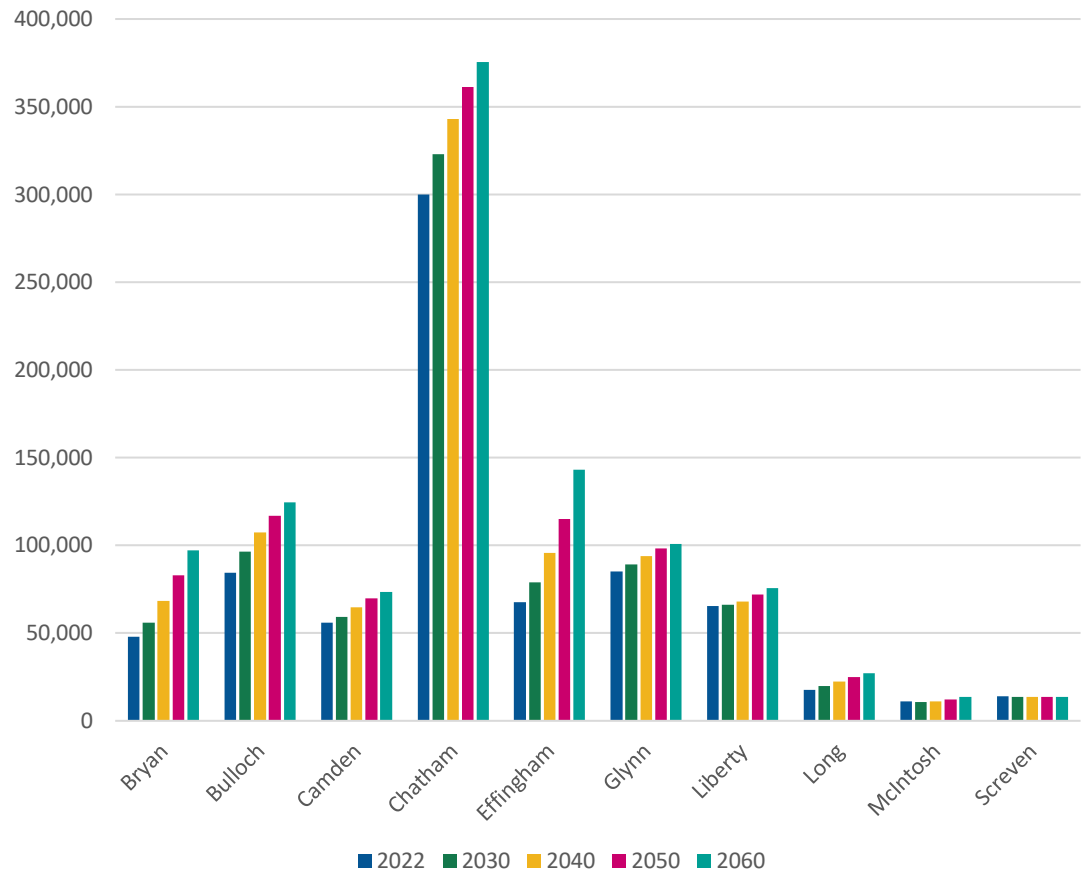


Table 10: Projected Population Growth

| Geography | 2020 | 2030 | 2040 | 2050 | 2060 |
|-----------|------------|------------|------------|------------|------------|
| CRC | 748,858 | 813,160 | 888,162 | 966,655 | 1,044,681 |
| Georgia | 10,891,679 | 11,764,473 | 12,786,367 | 13,545,662 | 14,147,873 |

Source: Governor’s Office of Planning and Budget, Series 2023

3.0 Employment Trends

Coastal Georgia is a major economic engine for the State of Georgia, and large public and private investments in the area’s port, logistical, and manufacturing facilities are creating opportunities for additional growth in the future. This section analyzes the current and future employment landscape for the Coastal Georgia region, including workforce growth, job concentrations, and major industries operating in the area.

3.1 Current Employment

Chatham County constitutes over 40 percent of the region’s employed residents. Bulloch and Glynn Counties contribute over 10 percent each of the total employed population. The region has a population aged 16 and over of around 575,000, resulting in an estimated 63 percent labor force participation rate. These numbers are according to the U.S. Census Bureau 2021 American Community Survey 5-Year Data. The employment by county and the percent that it constitutes of the region’s total employed population is reflected in **Table 11**.

Table 11: Employment by County

| County | Total Employed Population | Percent of Region’s Total Employed Population |
|------------|---------------------------|---|
| Bryan | 22,162 | 6.08% |
| Bulloch | 38,559 | 10.57% |
| Camden | 27,066 | 7.42% |
| Chatham | 155,074 | 42.52% |
| Effingham | 31,751 | 8.71% |
| Glynn | 40,242 | 11.03% |
| Liberty | 31,382 | 8.61% |
| Long | 7,416 | 2.03% |
| McIntosh | 4,956 | 1.36% |
| Screven | 6,072 | 1.67% |
| CRC | 364,680 | 100.00% |

Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

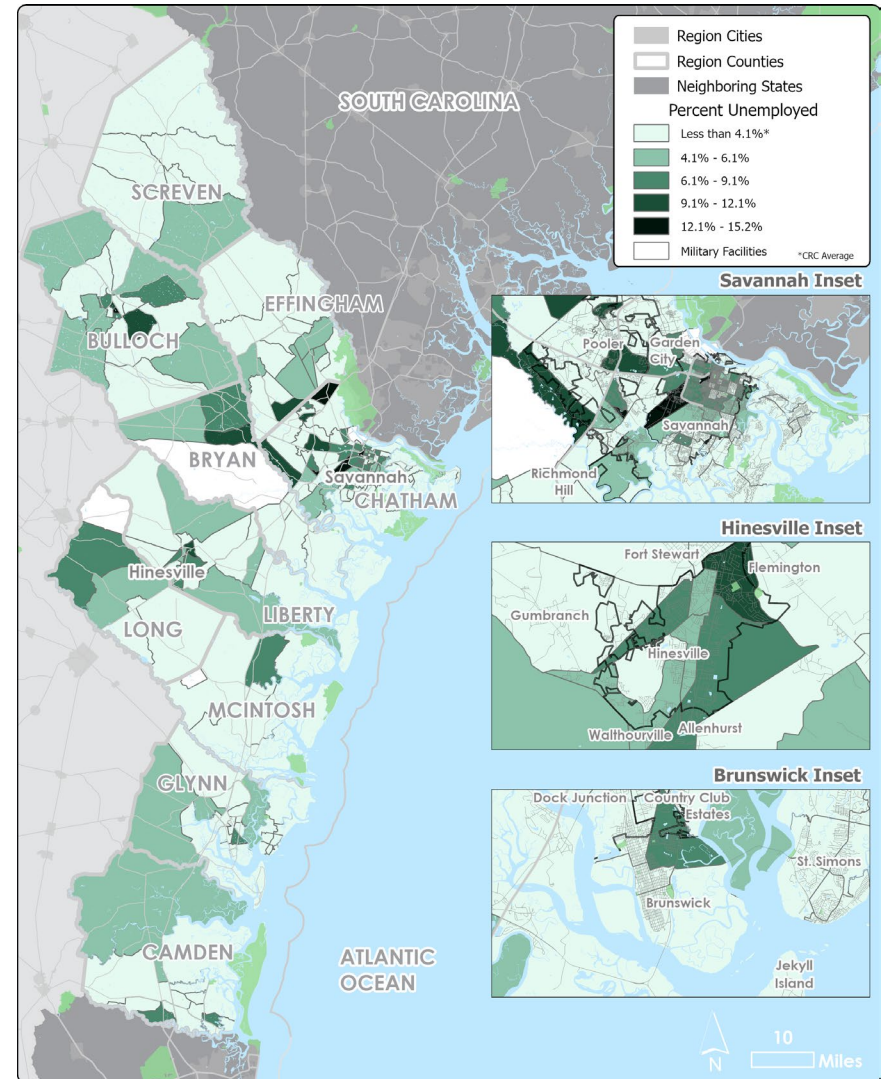
According to 2021 ACS 5-Year averages, 23,422 persons are unemployed in the region. This equates to a 4.1 percent unemployment rate. For comparison, this is a higher percentage than the state’s overall unemployment rate, which is at 3.5 percent (see **Table 12**). The highest concentrations of unemployment are found in Chatham and Bulloch Counties, as well as near the Hinesville area. **Figure 13** shows the proportion of unemployed residents in Coastal Georgia by census tract.

Table 12: Unemployed Population

| Geography | Total Population 16+ | Total Labor Force | Total Unemployed | Percent Unemployed |
|-----------|----------------------|-------------------|------------------|--------------------|
| CRC | 575,836 | 364,680 | 23,422 | 4.07% |
| Georgia | 8,385,039 | 5,329,864 | 290,843 | 3.47% |

Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

Figure 13: Unemployment by Census Tract



Source: U.S. Census Bureau 2021 American Community Survey 5-Year Data

3.2 Current Job Concentration

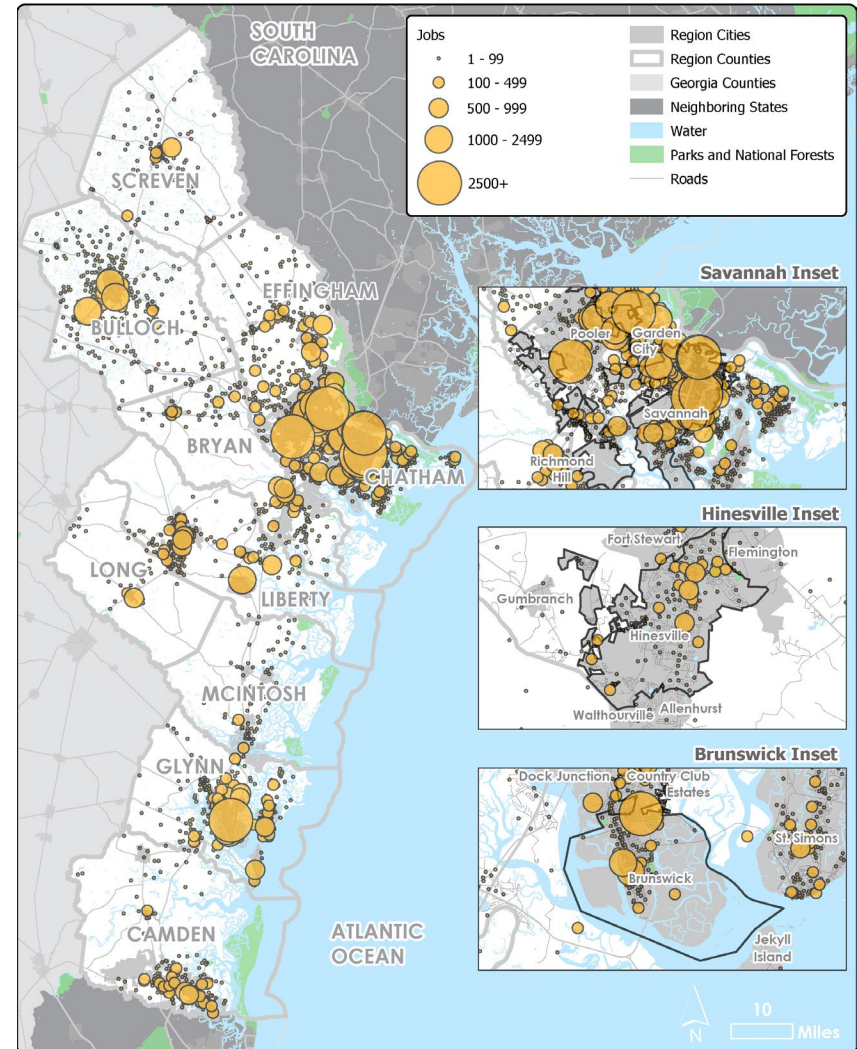
The U.S. Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD) program provides workforce data through its LEHD Origin-Destination Employment Statistics, or LODES. **Figure 14** shows the number of jobs for each census block in 2020 available from LODES.

The highest job concentrations are in Chatham County, particularly in the Savannah area. In addition, there are areas of higher employment in Bulloch and Glynn Counties.

Data from the United States Department of Agriculture (USDA) shows that while agriculture contributes to the economies of every county in the region, the industry is most prominent in Bulloch and Screven Counties. According to the 2017 USDA AgCensus, these counties contribute 48.4 percent and 27.3 percent of the region’s agricultural output value, respectively. Cotton, poultry, and cattle are the main agricultural products produced in the region.

Though data on agricultural production is provided by USDA, agriculture’s impact as a source of employment remains more difficult to quantify. Agricultural labor data is complicated by factors like seasonal fluctuation and the involvement of farmworkers that are self-employed, part-time, family members, or undocumented workers. The United States Bureau of Labor Statistics (BLS) focuses employment statistics on Nonfarm Payrolls, which exclude the self-employed, private household employees, volunteers, and farm employees. Both LODES and the Georgia Department of Labor (GDOL) utilize BLS data for their jobs, employment, and industry mix releases.

Figure 14: Job Concentration by Census Block



Source: U.S. Census Bureau LEHD Origin-Destination Employment Statistics

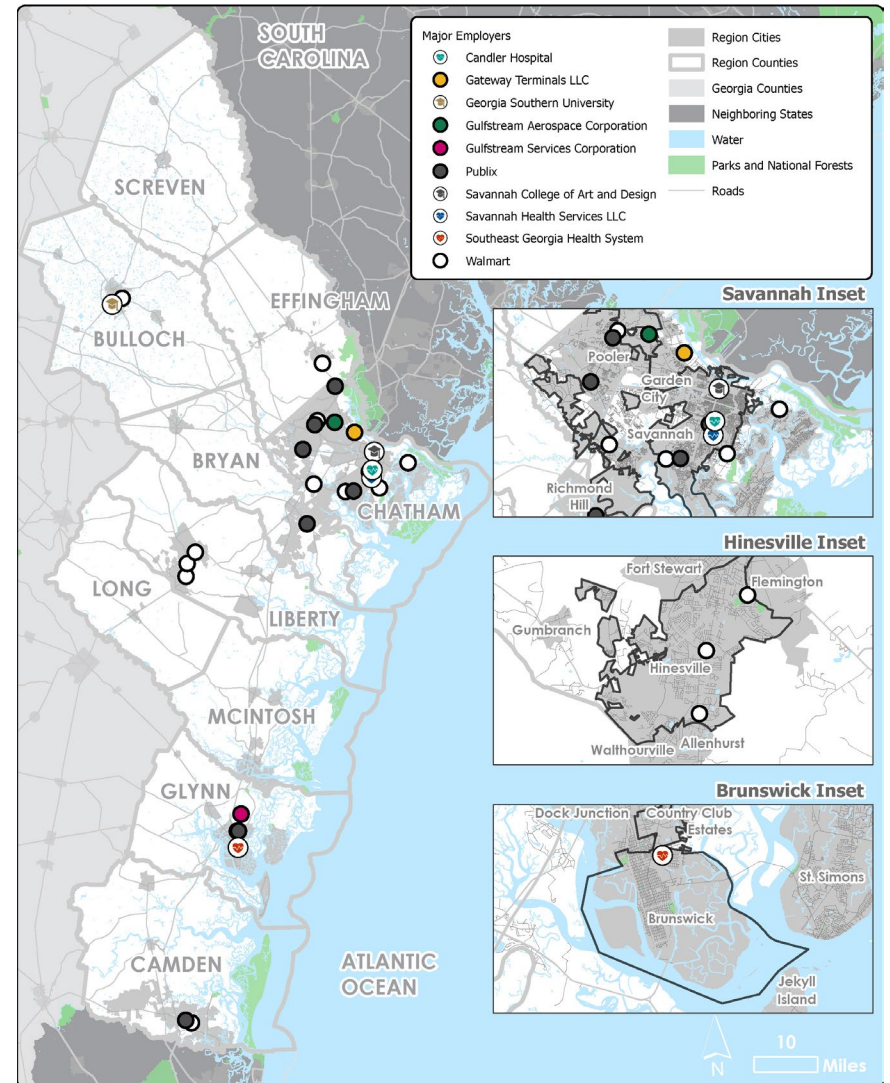
3.3 Major Industries

GDOL data shows Healthcare and Social Assistance (12.9 percent), Retail Trade (12.5 percent), Accommodation and Food Services (9.8 percent), Education Services (9.6 percent), and Manufacturing (9.5 percent) as the top industries in Coastal Georgia.

- The region’s top healthcare employers include Candler Hospital and Savannah Health Services (doing business as Memorial Health University Medical Center) in Savannah, and Southeast Georgia Health System locations in the Brunswick and St. Marys areas.
- While no Accommodation and Food Services businesses are in the region’s top ten employers, many businesses support Savannah’s tourism and visitor economy.
- The region’s top retail employers are Publix locations in the Brunswick, Savannah, and St. Marys areas, and Walmart locations in the Hinesville, Rincon, Savannah, St. Marys, and Statesboro areas.
- Georgia Southern University (GSU) has the highest enrollment of higher education facilities in the region with its 2021 enrollment of approximately 27,080 students. The Savannah College of Art and Design (SCAD) has the second-highest enrollment in the region with approximately 15,640 students. Both of these institutions place in the top ten largest employers in the region. Other higher education facilities in the region include the College of Coastal Georgia and several technical college campuses.
- According to the Savannah Economic Development Authority (SEDA), Gulfstream Aerospace Corporation and Gulfstream Services Corporation are just two of the nearly 300 advanced manufacturers in the Savannah area.
- Gateway Terminals LLC provides operating services to the Georgia Ports Authority (GPA) at the Port of Savannah.

The region’s top private sector employers by number of employees are shown in **Figure 15**.

Figure 15: Major Employers



Source: Georgia Department of Labor Area Labor Profile

3.4 Future Employment Trends

Table 13 provides the Georgia Department of Labor’s industry projections through 2030. Based on these projections, hospitality-related industries like Food Services and Drinking Places (highest-growth industry) and Accommodation including Hotels and Motels (third highest-growth industry) are expected to continue growing in the region. Healthcare-related industries account for four of the ten highest-growth industries: Ambulatory Health Care Services, Hospitals, Social Assistance, and Nursing and Residential Care Facilities.

Other notable high-growth industries include Educational Services, Warehousing and Storage, and Administrative and Support Services. These areas of growth largely reflect the region’s major employers in higher education, freight-related logistics, and staffing and support services.

The highest-growth industry projections are largely consistent with the five industry focus sectors determined by the Coastal Workforce Development Board and by the Coastal Regional Commission in the 2022-2027 Comprehensive Economic Development Strategy (CEDs):

- Logistics and Warehousing
- Healthcare
- Manufacturing
- Hospitality
- Construction

Table 13: Industry Projections

| Industry Title | 2020-2030 Employment Change | |
|---|-----------------------------|---------|
| | Total | Percent |
| Food Services and Drinking Places | 8,290 | 29.7% |
| Ambulatory Health Care Services | 3,470 | 29.0% |
| Accommodation including Hotels and Motels | 3,420 | 56.1% |
| Educational Services | 2,350 | 9.4% |
| Warehousing and Storage | 2,280 | 41.2% |
| Administrative and Support Services | 2,140 | 11.6% |
| Hospitals | 2,140 | 17.3% |
| Social Assistance | 1,490 | 30.2% |
| General Merchandise Stores | 1,440 | 20.7% |
| Nursing and Residential Care Facilities | 1,240 | 30.3% |
| Support Activities for Transportation | 1,220 | 19.0% |
| Professional, Scientific, and Technical Services | 1,140 | 13.2% |
| Government | 1,050 | 3.7% |
| Clothing and Clothing Accessories Stores | 940 | 35.7% |
| Amusement, Gambling, and Recreation Industries | 940 | 34.5% |
| Food and Beverage Stores | 910 | 13.9% |
| Repair and Maintenance | 600 | 16.5% |
| Religious, Grantmaking, Civic, Professional, and Similar Organizations | 570 | 15.9% |
| Personal and Laundry Services | 530 | 26.2% |
| Health and Personal Care Stores | 480 | 21.0% |

Source: Georgia Department of Labor Long-Term Industry Projections

4.0 Travel Trends

This section includes information on travel patterns within Coastal Georgia. Understanding regional travel patterns will help identify intra- and cross-county traffic flows as well as transit demand in the region.

4.1 Background

The Regional Integrated Transportation Information System (RITIS) platform and the INRIX Analytics suite provide information on travel patterns based on millions of data points collected daily. For this report, the data trends covered in the following subsections are based on RITIS INRIX origin-destination trip data from January 2022 through December 2022. The origin-destination data includes all trips across all modes in 2022.

4.2 Geographic Areas for Travel Trends Analysis

The analysis of travel trends in Coastal Georgia includes all counties within the region and all counties that share a border with the region, including the following:

- Five counties in the Heart of Georgia Altamaha region: Candler, Emanuel, Evans, Tattnall, and Wayne
- Three counties in South Carolina: Allendale, Hampton, and Jasper
- Two counties in Southern Georgia: Brantley and Charlton
- Two counties in Central Savannah River Area: Burke and Jenkins
- One county in Florida: Nassau

4.3 Travel Patterns within the Region

The major travel pattern in the Coastal Georgia region is intra-county travel, with 87 percent of trips reporting origins and destinations within the same county for the 2022 study period. As shown in **Table 14**, the counties with the highest percentage of internal trips are Chatham, Glynn, and Bulloch.

Table 14: Total Trips and Intra-County Percentage (2022)

| County | Total Trips | Intra-County Trip Percentage |
|-----------|-------------|------------------------------|
| Chatham | 44,858,501 | 34.80% |
| Glynn | 16,642,828 | 12.91% |
| Bulloch | 16,045,627 | 12.45% |
| Liberty | 8,918,121 | 6.92% |
| Effingham | 8,383,523 | 6.50% |
| Camden | 8,002,775 | 6.21% |
| Bryan | 5,399,586 | 4.19% |
| Screven | 1,485,221 | 1.15% |
| McIntosh | 1,181,243 | 0.92% |
| Long | 1,089,644 | 0.85% |

Source: Regional Integrated Transportation Information System (RITIS), Trip Analytics. INRIX sample trip totals collected: All months 2022.

Inter-county travel is also a major contributor for a significant number of trips, with trip origins and destinations in Chatham County reporting the highest overall number of inter-county trips. The following three county pairs reported the most trips:

- Chatham and Effingham Counties,
- Chatham and Bryan Counties, and
- Liberty and Long Counties.

Figure 16 illustrates inter-county travel patterns, and **Table 15** provides the top origin-destination pairs and total number of trips for the time period analyzed – January 2022 to December 2022.

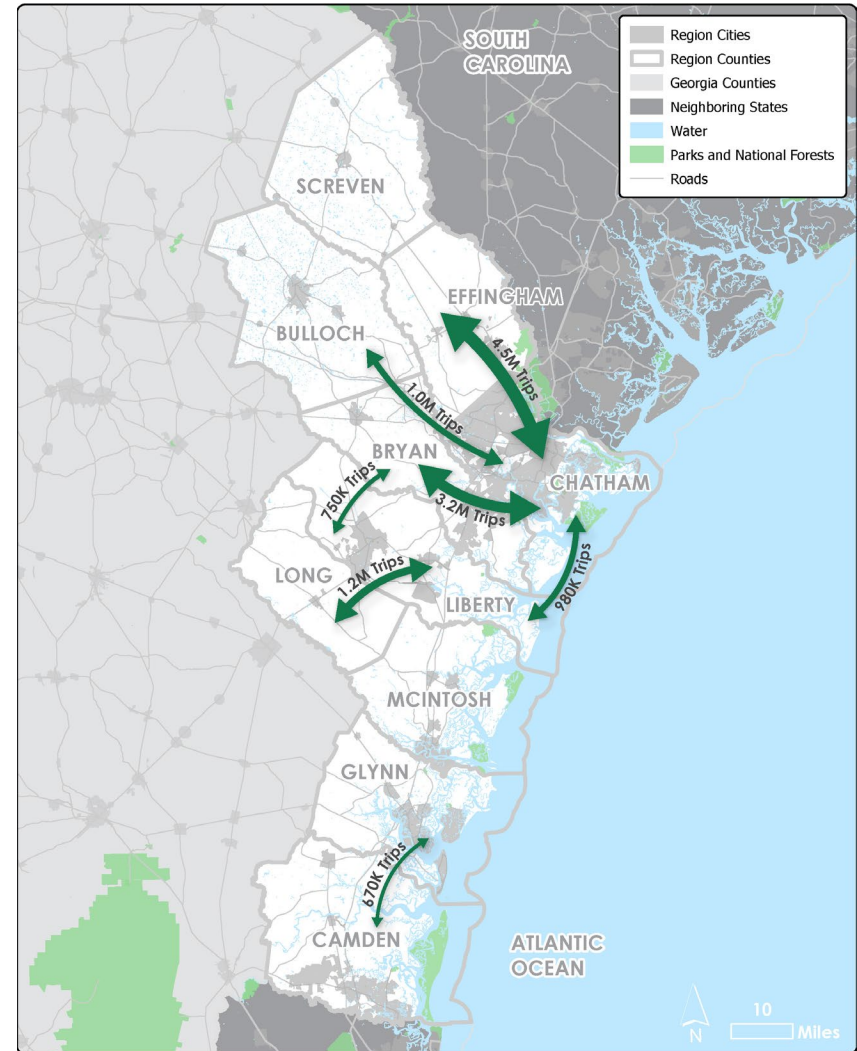
County pairs with fewer than 500,000 total trips during the study period are not included in the table or corresponding figure.

Table 15: Inter-County Trips in the Region

| Origin – Destination Pair | Total Trips |
|---------------------------|-------------|
| Chatham – Effingham | 4,465,534 |
| Chatham – Bryan | 3,207,859 |
| Liberty – Long | 1,232,677 |
| Bulloch – Chatham | 1,035,399 |
| Liberty – Chatham | 983,180 |
| Bryan – Liberty | 750,235 |
| Glynn – Camden | 672,743 |

Source: Regional Integrated Transportation Information System (RITIS), Trip Analytics. INRIX sample trip totals collected: All months 2022.

Figure 16: Inter-County Travel in the Region (2022)

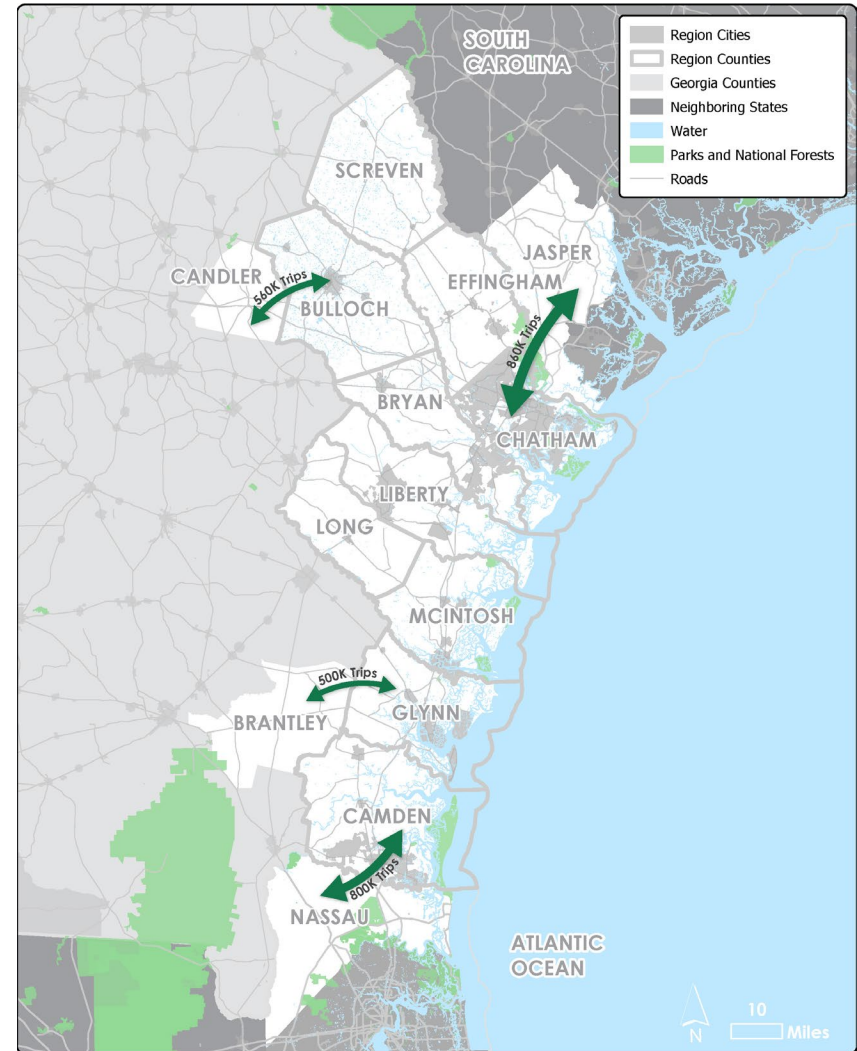


Source: RITIS INRIX Origin-Destination Data

4.4 Travel Patterns between the Region and Surrounding Areas

Inter-region and inter-state travel are important to analyze as key components of Coastal Georgia’s overall travel trends. **Figure 17** illustrates these inter-region and inter-state travel trends in the analysis period. County pairs with fewer than 500,000 total trips during the study period are not included in the figure. Additionally, **Table 16** and **Table 17** provide an overview of the total trips between Coastal Georgia and neighboring counties. The highest number of trips are recorded in inter-state travel to and from South Carolina (between Chatham and Jasper Counties) and Florida (between Camden and Nassau Counties). There is also significant inter-regional travel to the Heart of Georgia region (between Bulloch and Candler Counties) and to Southern Georgia (between Glynn and Brantley Counties).

Figure 17: Inter-Regional Travel (2022)



Source: RITIS INRIX Origin-Destination Data

Table 16: Origin-Destination Pairs where Destination is Outside of the Region (2022)

| Origin | Destination | Total Trips |
|----------------|-----------------|-------------|
| Chatham County | Jasper County | 437,090 |
| Camden County | Nassau County | 398,645 |
| Bulloch County | Candler County | 284,312 |
| Glynn County | Brantley County | 255,035 |
| Bulloch County | Evans County | 183,225 |
| Glynn County | Wayne County | 181,089 |
| Long County | Wayne County | 154,693 |
| Bulloch County | Emanuel County | 154,042 |
| Liberty County | Wayne County | 142,733 |
| Bulloch County | Jenkins County | 117,862 |
| Bulloch County | Tattnall County | 101,876 |
| Long County | Tattnall County | 86,841 |
| Chatham County | Candler County | 86,725 |
| Camden County | Charlton County | 84,137 |

Source: Regional Integrated Transportation Information System (RITIS), Trip Analytics. INRIX sample trip totals collected: All months 2022.

Table 17: Origin-Destination Pairs where Origin is Outside of the Region (2022)

| Origin | Destination | Total Trips |
|-----------------|----------------|-------------|
| Jasper County | Chatham County | 428,220 |
| Nassau County | Camden County | 407,290 |
| Candler County | Bulloch County | 274,358 |
| Brantley County | Glynn County | 249,182 |
| Evans County | Bulloch County | 181,035 |
| Wayne County | Glynn County | 177,485 |
| Emanuel County | Bulloch County | 153,555 |
| Wayne County | Long County | 145,721 |
| Wayne County | Liberty County | 141,884 |
| Jenkins County | Bulloch County | 115,204 |
| Tattnall County | Bulloch County | 100,812 |
| Tattnall County | Long County | 87,564 |
| Charlton County | Camden County | 83,980 |
| Candler County | Chatham County | 76,643 |

Source: Regional Integrated Transportation Information System (RITIS), Trip Analytics. INRIX sample trip totals collected: All months 2022.

4.5 Impacts of COVID-19 on Travel Patterns

The COVID-19 pandemic altered travel patterns across the country, including throughout the Coastal Georgia region. The GDOT Traffic Analysis and Data Application (TADA) Annual Average Daily Traffic (AADT) 2019-2021 data set provides evidence that the number of trips decreased during COVID-19. In 2021, transit trips in the region fell 56.4 percent compared to 2019 levels but rose 39.0 percent in 2022.

Trips that are normally classified as “essential,” such as medical appointments, occurred less frequently during the pandemic. Healthy individuals put off routine healthcare visits or were able to take advantage of telehealth appointments.

As for work trips, many industries shifted to remote work at the beginning of the pandemic. Where possible, the remote work lifestyle continued even as pandemic restrictions lifted. Many major industries in Coastal Georgia, such as hospitality, warehousing, and essential healthcare positions, are not conducive to remote work.

Pandemic precautions limited and discouraged in-person gatherings, particularly in densely populated areas. As a result, many in-state college students returned home and completed their classes virtually. This situation resulted in lower activity in the vicinity of the region’s colleges and universities, particularly in the Statesboro and Savannah areas, which are home to Georgia Southern University and the Savannah College of Art and Design, respectively.

Leisure travel was impacted at the beginning of the pandemic, but Coastal Georgia is known for its wealth of outdoor experiences that people can enjoy safely. National reports found that camping, particularly recreational vehicle camping, surged during the pandemic as individuals sought ways to travel in an isolated manner. There are four major state parks and many campgrounds with recreational vehicle parking in the region.

National public and private transit experienced lower ridership during the pandemic as many people feared traveling in the same vehicle as others. As case numbers ebbed and flowed, transit also went through waves of increased and decreased ridership. Transit ridership in Coastal Georgia had not recovered to pre-pandemic levels by 2022, but additional ridership recovery has been recorded throughout 2023.

5.0 Existing Transportation Network

The following section has information on the transportation network, including an overview of the roadway system, traffic volumes, and traffic count percent change over time.

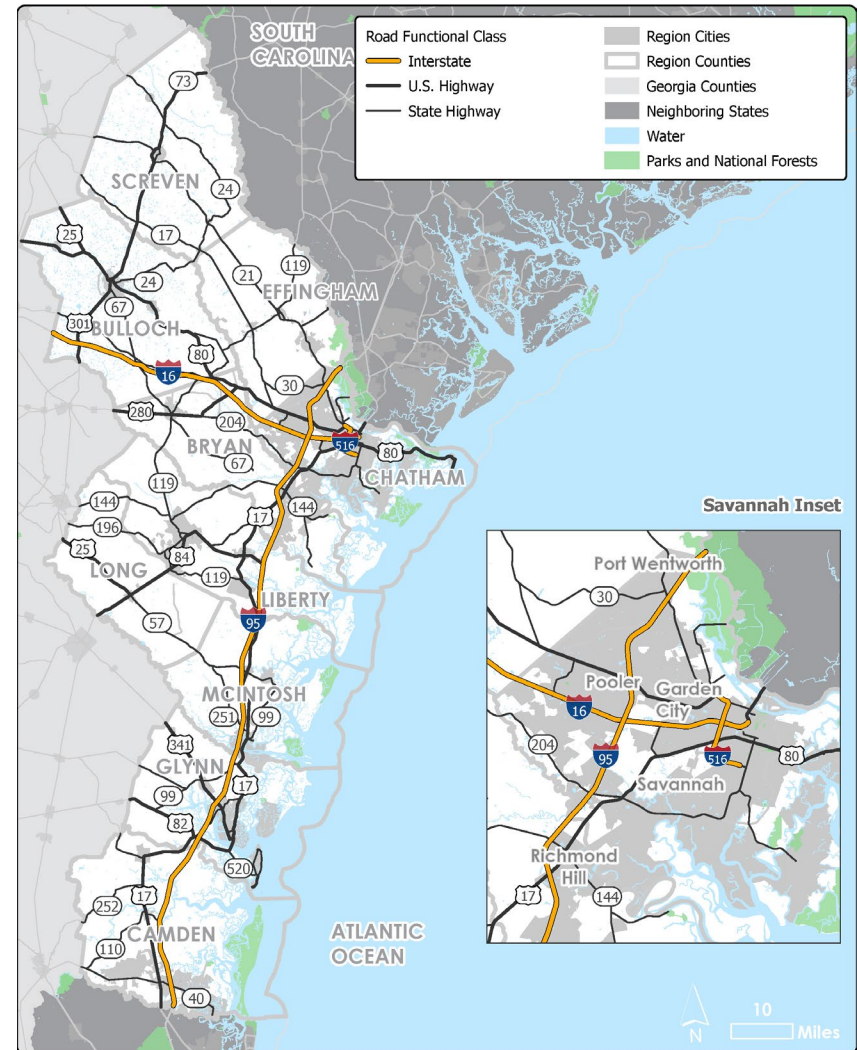
5.1 Transportation System Overview

The transportation system in Coastal Georgia primarily consists of the roadway network, demand-response and fixed-route transit services, non-motorized facilities such as sidewalks and bike lanes, and intercity transportation options that include intercity bus and Amtrak intercity rail services. As shown in **Figure 18**, there are several highly traveled Interstate highways, along with US and State Routes that provide connectivity for the region.

Major corridors that serve the region include:

- I-95, the region’s main north-south route, which runs from the South Carolina border at Port Wentworth to the Florida border near St. Marys.
- I-16, which connects the City of Savannah with Macon and on to Atlanta via I-75.
- US-80, which runs roughly parallel to I-16 and connects Statesboro to Savannah and Chatham County.
- US-341, which connects Brunswick with Jesup and other areas to the west.
- State Route (SR) 21, which serves as the major connection between Chatham, Screven, and Effingham Counties.

Figure 18: Existing US and State Highway Network



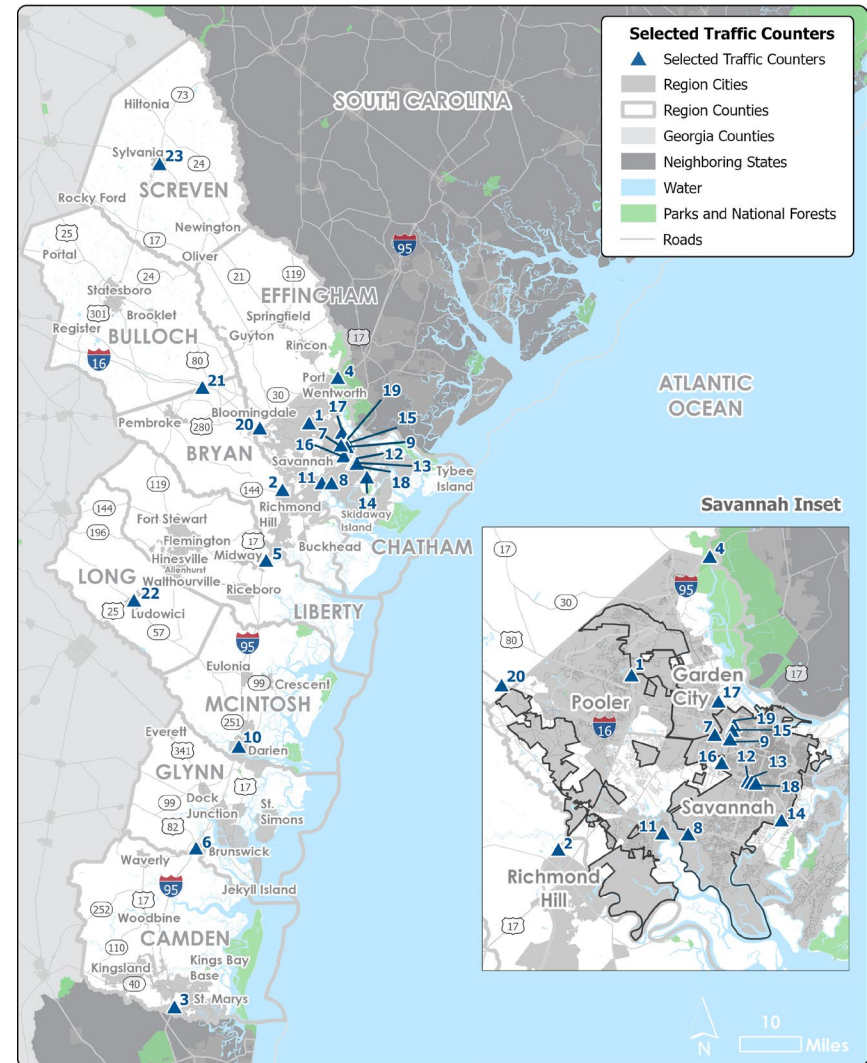
Source: GDOT, U.S. Bureau of Transportation Statistics

5.1.1 Annual Average Daily Traffic

GDOT collects and reports traffic volume for all vehicle classes (car, single-unit truck, multi-unit truck) throughout the state of Georgia from traffic count stations, measured as Annual Average Daily Traffic (AADT). This traffic volume provides valuable data and critical information for federal reporting and for analyzing traffic patterns and other statistics.

Figure 19 shows the location of selected count stations. For the purposes of this analysis, count stations were selected along the major routes and spread out geographically across the region. Each county has at least one count station. The busiest counter in the region, along I-95 in Chatham County, had an AADT of 96,500 in 2022, a 4.4% increase over 2019 counts. Most of the sampled counters saw increases during this time period. Complete details for these counters are provided in **Table 18**.

Figure 19: Selected Counters for Annual Average Daily Traffic



Source: GDOT Road and Traffic Data

Table 18: Average Annual Daily Traffic

| Map ID | GDOT Traffic Counter ID | Roadway Functional Class | Roadway Name | County | 2019 AADT | 2022 AADT | % Change |
|--------|-------------------------|---|-----------------------|-----------|-----------|-----------|----------|
| 1 | 051-0385 | Urban Principal Arterial - Interstate | I-95 | Chatham | 92,400 | 96,500 | 4.4% |
| 2 | 029-0198 | Urban Principal Arterial - Interstate | I-95 | Bryan | 87,200 | 91,400 | 4.8% |
| 3 | 039-0218 | Urban Principal Arterial - Interstate | I-95 | Camden | 70,100 | 75,100 | 7.1% |
| 4 | 103-0202 | Rural Principal Arterial - Interstate | I-95 | Effingham | 59,000 | 65,500 | 11.0% |
| 5 | 179-0136 | Urban Principal Arterial - Interstate | I-95 | Liberty | 57,900 | 65,100 | 12.4% |
| 6 | 127-0307 | Rural Principal Arterial - Interstate | I-95 | Glynn | 57,900 | 64,400 | 11.2% |
| 7 | 051-0369 | Urban Principal Arterial - Interstate | I-16 | Chatham | 67,800 | 64,100 | -5.5% |
| 8 | 051-0324 | Urban Principal Arterial - Other | Abercorn St. | Chatham | 61,900 | 63,900 | 3.2% |
| 9 | 051-0136 | Urban Principal Arterial - Interstate | US Hwy. 17 | Chatham | 64,300 | 63,800 | -0.8% |
| 10 | 191-0183 | Rural Principal Arterial - Interstate | I-95 | McIntosh | 57,100 | 63,300 | 10.9% |
| 11 | 051-0323 | Urban Principal Arterial - Other | Abercorn St. | Chatham | 63,500 | 62,900 | -0.9% |
| 12 | 051-0142 | Urban Principal Arterial - Freeways & Expressways | SR 21 | Chatham | 55,400 | 50,300 | -9.2% |
| 13 | 051-0143 | Urban Principal Arterial - Other | W. de Renne Ave. | Chatham | 52,900 | 50,200 | -5.1% |
| 14 | 051-1154 | Urban Principal Arterial - Freeways & Expressways | Harry S. Truman Pkwy. | Chatham | 35,000 | 47,400 | 35.4% |
| 15 | 051-0134 | Urban Principal Arterial - Interstate | I-516 | Chatham | 44,900 | 47,200 | 5.1% |
| 16 | 051-0140 | Urban Principal Arterial - Interstate | Wm. F Lynes Pkwy. | Chatham | 46,200 | 46,900 | 1.5% |
| 17 | 051-0123 | Urban Principal Arterial - Interstate | Augusta Rd. | Chatham | 46,400 | 44,300 | -4.5% |
| 18 | 051-0145 | Urban Principal Arterial - Other | E. de Renne Ave. | Chatham | 43,300 | 39,600 | -8.5% |
| 19 | 051-0132 | Urban Principal Arterial - Interstate | US 80 | Chatham | 38,200 | 39,400 | 3.1% |
| 20 | 103-0197 | Rural Principal Arterial - Interstate | I-16 | Effingham | 37,400 | 37,200 | -0.5% |
| 21 | 031-0361 | Rural Principal Arterial - Interstate | I-16 | Bulloch | 32,400 | 35,300 | 9.0% |
| 22 | 183-0114 | Rural Principal Arterial - Other | E. Cypress St. | Long | 12,000 | 14,500 | 20.8% |
| 23 | 251-0125 | Rural Minor Arterial | SR 21 | Screven | 7,840 | 8,830 | 12.6% |

Source: GDOT Road and Traffic Data

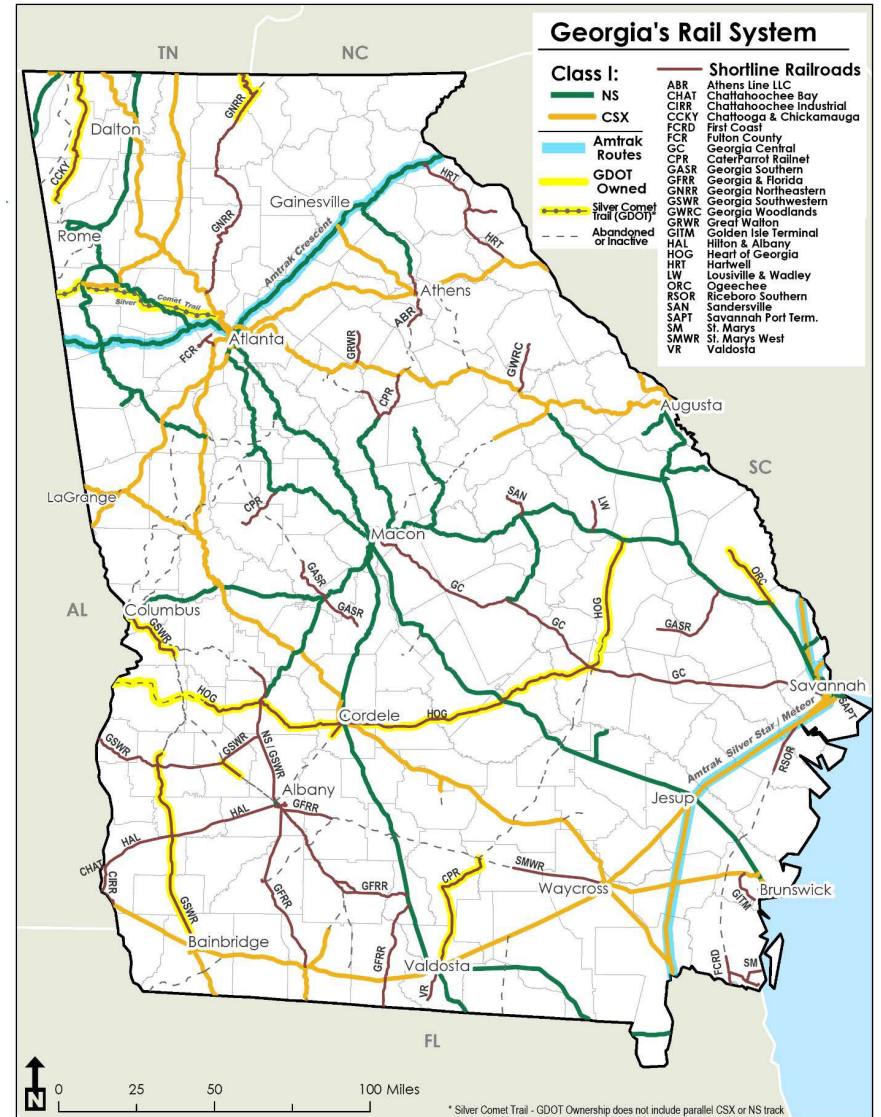
5.3 Rail

Two Class I railroads operate within Coastal Georgia. The first, operated by CSX Transportation, has mainlines passing through the northern portion of the region and passing through Glynn County in the southern portion of the region. These mainlines provide connections from the Ports of Brunswick and Savannah to the Atlanta region, South Carolina, and Florida. Regional rail yards along the CSX main lines include Savannah, Southover, and Brunswick. The second Class I railroad, operated by Norfolk Southern (NS), has mainlines running northwest from the Ports of Brunswick and Savannah. Regional rail yards along the NS mainlines include Brunswick, Dillard, Eanes, Foundation Lead, and S Line.

The Class III Ogeechee Railroad operates on state-owned rail in Screven County. Other Class III shortlines in the region include the First Coast, Georgia Central, Georgia Southern, Golden Isle Terminal, Riceboro Southern, Savannah Port Terminal, and St. Marys Railroads. **Figure 21** shows these regional lines in relation to the state’s rail network.

Within Coastal Georgia, three Amtrak routes stop at the Amtrak passenger station in Savannah. The Silver Meteor and Silver Star connect New York City and Miami, passing through 11 states. A shorter version of the Silver Service lines, the Palmetto, connects New York City and Savannah. Each train stops in Savannah twice daily, once northbound and once southbound. The Auto Train, a nonstop line for passengers and their vehicles, passes through Savannah but does not stop as it travels between Washington, D.C., and Orlando. All Amtrak routes operate over the trackage of Class I freight railroads.

Figure 21: State Rail Network



Source: GDOT Georgia State Rail Plan

5.4 Active Transportation

Active transportation refers to the concept of using walking or biking as a means of traveling from an origin to a destination. These means can occur on sidewalks, bikeways, or trails. Sidewalks are present in most Coastal Georgia region municipalities. Statesboro and Savannah are the cities with the most sidewalk infrastructure. Additionally, Savannah has shared lanes, bike lanes, and bike paths. Bike lanes are also present on Georgia Southern University's campus in Statesboro.

This region is home to statewide bike routes and one national bike route.² The U.S. Bike Route in the region is U.S. Bike Route 1, a north/south route starting in Effingham County and running to Camden County. Statewide bike routes include:

- Savannah River Run – East/West starting west of Sylvania, GA (in Screven County) and ending in Savannah, GA (in Chatham County)
- Coastal – North/South starting north of Springfield, GA (in Effingham County) and ending south of Kingsland, GA (in Camden County)

- March to the Sea – East/West starting northwest of Rocky Ford, GA (in Screven County) and ending in Savannah, GA (in Chatham County)
- TransGeorgia – East/West starting west of Register, GA (in Bulloch County, GA) and ending in Savannah, GA (in Chatham County)
- Southern Crossing – East/West spanning across Glynn County to Jekyll Island

The Coastal Georgia region has several trails throughout the region.³ The Coastal Georgia Eco-Tourism map⁴ highlights the Woodbine Nature Trail and River Walk and White Oak Nature Trail in Camden County; Harris Neck National Wildlife Refuge Visitor Center in McIntosh County; the Green Creek Trail in Bryan County; Bungard Conservation Area and Ogeechee Trail Nature Preserve in Chatham County; and S&S Trail Head in Bulloch County. The most notable trail is the Colonial Coast Birding Trail, which parallels the Georgia coast, starting in Savannah and ending in St. Marys in Georgia's southeastern tip. There are 17 sites along the trail, providing visitors access to see over 300 species of birds.

² <https://www.dot.ga.gov/GDOT/Pages/BikePed.aspx>

³ <https://segrass.maps.arcgis.com/apps/webappviewer/index.html?id=b35c445865b048399577c30c19f7154c>

⁴ <https://georgiabirdingtrails.com/sites/default/files/users/user10/pdf/CCBT%20Map.pdf>

6.0 Existing Transit Plans

A review of studies pertinent to Coastal Georgia was conducted to understand the issues, opportunities, and recommendations that have been previously identified for the region and its individual municipalities. The Regional TDP will take previous planning efforts into consideration to identify comprehensive transit solutions for Coastal Georgia.

6.1 GDOT Georgia Statewide Transit Plan

The Georgia Statewide Transit Plan (SWTRP) was last updated in 2020. The SWTRP identifies transit needs and opportunities, reviews local, county, and regional plans, and recommends policy and priority projects for implementation across the state. The plan describes the different types of transit service provided in the state, including:

- Demand response
- Fixed route
- Vanpool
- Flex route
- Microtransit
- Express bus
- Intercity transit
- Heavy rail
- Streetcar
- Ferry

Demand response refers to small bus operations that require advance reservation and provide door-to-door service. Demand-response service does not operate on a fixed route or schedule but rather meets passengers' needs by picking up and dropping off at desired locations. In rural areas of Georgia, transit service is focused on the demand-response model. The SWTRP notes that there were 80 transit systems across the state which provide demand-response service at the time of publication. Five of these 80 cover multiple counties (26 counties). The demand-response systems provided 1.8 million trips to Georgians in 2017.

Fixed route typically refers to small bus operations that follow a determined route with known stops and a set schedule. Fixed-route service is a good option for an urbanized area with multiple destinations, such as a downtown shopping area or route with businesses.

The SWTRP reported that there were 4,965,289 transit trips in the Coastal Georgia region in 2017. This is in the middle range compared to other regions across the state. Chatham Area Transit accounted for 97.0 percent of these trips, with Coastal Regional Coaches providing 2.6 percent. The remaining 0.4 percent were provided by Liberty Transit.

Other trends reported in the SWTRP include the following:

- **The rising populations of low-income, elderly, disabled, and zero-car households.** In Coastal Georgia, low-income, youth, elderly, and disabled populations were higher than the state average in several counties. LEP populations were largely below the state average.

- **Advances in transportation-related technological advances.** Ridesharing programs are becoming more accepted as a viable means of travel and both accompany transit as well as compete with it. Digital platforms that aid trip scheduling have the potential to meaningfully impact ride scheduling and reliability. Connected and autonomous vehicles need to be part of the transit conversation.
- **Rural areas that are growing in population may be absorbed into urban areas.** This changes the federal funding calculation.

Additionally, the SWTRP contains an Implementation Report that is updated annually to report on transit performance. The last Implementation Report was published in 2022 and includes transit service information for 2021 and 2022. This report details statewide goals, performance measures, and strategies. Goals identified in this report that are relevant to Coastal Georgia include the following:

- Increasing regional and multi-county transit systems,
- Coordination between GDOT and Department of Human Services (DHS) transit systems,
- Allowing rural providers to cross county lines,
- Increasing revenue service hours and trips per service hour, and
- Utilizing smartphone apps (such as GDOT’s Let’s Ride App) for trip planning.

6.2 GDOT Georgia Statewide Transportation Plan/Statewide Strategic Transportation Plan

Updated in 2021, the combined Georgia 2050 Statewide Transportation Plan (SWTP) and Statewide Strategic Transportation Plan (SSTP) plans focus on how GDOT will carry out Governor Kemp’s strategic goals for the state, specifically focused on meeting the transportation needs of all Georgians. These plans detail the status of the statewide transportation system and future trends, opportunities, and challenges through 2050.

The public outreach for these planning efforts identified Georgia residents’ top three transportation concerns for the future, which include:

- More public transportation options,
- Reduction in traffic congestion, and
- Better roadway system connectivity.

The plans are broken into sections such as Statewide Freight and Logistics, People Mobility in Metro Atlanta, and People Mobility in Emerging Metros and Rural Georgia. One of Governor Kemp’s goals is to strengthen rural areas in the state, and GDOT sees regional teaming and partnerships as vital to improve life in rural communities. Additionally, increasing access to jobs, goods, and services throughout emerging metro areas and rural areas is a theme that runs through this report.

In terms of transit and shared mobility, these reports focus on the state’s urban transit systems but present a wealth of content regarding the changing dynamics in rural areas. These trends include, but are not limited to, increasing population and employment, an aging population, an increase in individuals with disabilities, and a high vehicular crash rate.

6.3 GDOT Rural and Human Services Transportation Plan

Completed in 2023, the Georgia 2050 Rural and Human Services Transportation (RHST) Plan was a joint effort of GDOT, DHS, and the Department of Community Health (DCH) to develop a five-year update to the state’s RHST Coordination Plan. This plan provides a framework for coordination among Georgia’s agencies interested in delivering rural mobility services. The focus areas of the plan are the state’s three systems for rural mobility services: rural public transit, administered by GDOT; human services transportation, administered by DHS; and non-emergency medical transportation (NEMT), administered by DCH.

6.4 GDOT Group Transit Asset Management Plan

The 2022 Group Transit Asset Management (TAM) Plan Update was completed in September 2022. TAM is a business model which prioritizes funding for transit projects based on the condition of assets, with the goal of maintaining a state of good repair (SGR) for all participating transit networks.

As required by the Federal Transit Administration (FTA), the TAM Plan covers a four-year period. The most recent Group TAM Plan from 2018 ends in fiscal year 2022, and consists of the following elements:

- Inventory of Capital Assets: The three categories of public transit assets are Rolling Stock, Equipment, and Facilities
- Condition Assessment: Each asset within a provider’s inventory for which it has direct capital responsibility is evaluated
- Decision Support Tool: This section analyzes data from the previous sections and comes up with a methodology for prioritizing SGR re-investment needs among the assets

- Prioritized List of Investments: Based on the decision support tool and projected funding over the four-year period, this section concludes the TAM Plan

Federal law requires GDOT, as the Group Plan sponsor, to set annual SGR performance targets for each type of asset, which are updated on an annual basis. These performance measures are as follows:

- Rolling Stock: Percentage of revenue vehicles that have either met or exceeded their Useful Life Benchmark (ULB), as determined by their asset type
- Equipment: Percentage of non-revenue, support-service, and maintenance vehicle equipment that has either met or exceeded their ULB
- Facilities: Percentage of facilities rated below condition 3.0 on the Transit Economic Requirements Model scale

All transit providers within Coastal Georgia were included in the 2022 TAM Plan except Chatham Area Transit, which developed an independent TAM plan. Buses and cutaway buses were among the proposed investments for the region’s participants; most of these projects were prioritized for fiscal years 2024 through 2026.

6.5 CORE MPO 2045 Metropolitan Transportation Plan

The Coastal Region Metropolitan Planning Organization (CORE MPO) updated their Metropolitan Transportation Plan (MTP) in 2019. The MTP identifies the vision, goals and objectives, strategies, and projects that will improve the region’s transportation systems and mobility through 2045. It includes an overview of regional characteristics, regional goals and performance measures, a review of the existing regional transportation network, and a financial plan with project recommendations.

The entire CORE MPO planning area was considered, encompassing the City of Savannah and all of Chatham County, Richmond Hill in Bryan County, and parts of Effingham County. The region’s two transit providers, Chatham Area Transit Authority and Coastal Regional Commission, were consulted in the production of this MTP.

The MTP presents transit-related goals and objectives including:

- Maintain a state of good repair for transit vehicles and facilities,
- Encourage the use of transit with a focus on areas with low rates of automobile ownership and/or large elderly and/or disabled populations, and
- Increase accessibility and connectivity for all by expanding the transit service area and increasing service frequency.

The MTP also provides a list of transit capital improvements for the next 26 years. These projects were selected and prioritized based on need and sustainability. Among the transit capital projects are:

- Vehicle replacement and expansion programs,
- Electric vehicle infrastructure development,

- Farebox and payment systems upgrades,
- Implementation of Intelligent Transportation Systems (ITS),
- Improvement of existing transit facilities and construction of new facilities, and
- Enhancement of passenger amenities.

The CORE MPO is developing its next MTP, Moving Forward Together 2050, with expected adoption in August 2024.

6.6 BATS 2045 Metropolitan Transportation Plan

The 2045 Brunswick Area Transportation Study (BATS) MTP provides long-range planning for transportation projects and programs in the BATS region which encompasses Glynn County, including the City of Brunswick, St. Simons Island, Jekyll Island, Sea Island, and Little St. Simons Island. The MTP process identifies needs, financial resources, and priorities for the region for a planning horizon of at least 20 years. The BATS 2045 MTP was last updated in 2020 and includes a review of existing plans, an assessment of current conditions in the BATS region, a performance-based framework for project prioritization and assessing system performance, and policy recommendations.

Support for transit is included throughout the plan’s policy recommendations. Providing convenient and reliable transit service is listed as a strategy for managing growing travel demand in the region. The MTP also proposes partnerships with transit agencies to leverage technology such as smartcards, open data, and universal apps to provide riders with real-time schedules and platforms to book and pay for multimodal trips.

6.7 Chatham Area Transit Master Transit Plan

The Chatham Area Transit Master Transit Plan, Chatham Connects, was adopted in 2023 and outlines a strategic plan for mobility in Coastal Georgia from 2023 to 2050. Chatham Area Transit Authority (CAT) provides bus and ferry service in the City of Savannah, a portion of unincorporated Chatham County, and parts of Garden City and Port Wentworth. CAT currently offers three modes of public transportation services (fixed-route bus service, ADA complementary paratransit, and ferry service).

The Master Transit Plan consists of an overview of the state of the system, a market analysis, a list of goals and investment priorities, and planning and funding recommendations. The state of the system analysis reveals a top priority of restoring bus and ferry service to pre-COVID levels, requiring a focus on staff development to address an ongoing shortage of drivers. The market analysis identifies important travel flows within the City of Savannah, across Chatham County, and between Chatham, Effingham, and Bryan Counties.

Based on the region's needs identified in the market analysis, CAT developed the following transit goals:

- Expand geographic service area to reach new markets and address service gaps,
- Improve existing service through increased frequency of service, longer hours of operation, and more service on weekends,
- Expand sustainable infrastructure including electric and hybrid vehicles, hydrogen power, and other clean fuel technologies,
- Expand ferry service to run more frequently and to more places,
- Develop new types of transit including microtransit and express bus commuter services,
- Improve passenger facilities by updating amenities and creating mobility hubs/super stops, and

- Be equitable by increasing service levels in neighborhoods with high concentrations of low-income and/or zero-car households and expanding fare-free transit.

Planning recommendations were determined based on these goals and are divided between three timeframes – short (FY24 – FY27), medium (FY28 – FY30), and long (FY31 – FY35) term. The short-term recommendations include:

- Complete capital investment programs that are already in planning or are underway,
- Develop staff to restore service to pre-pandemic levels,
- Leverage SMART Grant funds to implement microtransit,
- Use available funds to improve bus stop amenities, and
- Develop new partnerships to build commuter programs.

The medium-term plan recommendations are:

- Develop the first high-frequency fixed-route bus service,
- Expand service hours on high-ridership routes,
- Implement commuter express bus programs for suburban employment centers,
- Continue improvements to passenger facilities and fleet replacement,
- Maintain a state of good repair for all transit assets,
- Expand microtransit service hours and destinations, and
- Expand ferry service to new West End Dock.

The long-term plan recommendations are:

- Expand transit service to more than double the current levels,
- Increase frequency and span of fixed-route service,
- Expand microtransit across the county,
- Add a new bus route to Hutchinson Island,
- Expand ferry service to include a new route, and
- Further expand commuter express service.

Additional transit-related recommendations included the use of corridor-based improvements like signal prioritization and dedicated bus lanes, allowing buses to operate on highway shoulders, and encouraging transit-oriented development.

6.8 HAMPO 2045 Metropolitan Transportation Plan

The Hinesville Area Metropolitan Planning Organization (HAMPO) 2045 MTP identifies the vision, goals, objectives, and strategies for improvement of the region's transportation network from 2020 to 2045. The HAMPO planning area encompasses Liberty County and the urbanized portions of Long County, including Fort Stewart, Hinesville, Allenhurst, Flemington, Gum Branch, Midway, Riceboro, and Walthourville. The 2045 MTP consists of a review of existing plans and studies, development of goals and performance measures, an existing conditions assessment with future projections, a description of the public involvement process, and a list of projects for the 25-year planning horizon.

The existing transit in the HAMPO planning area consists of a mix of public and private services. The main service providers are Coastal Regional Coaches, Liberty Transit, Greyhound, and private taxi, shuttle, car, and limousine companies. Between these providers, the region has fixed-route bus service, paratransit, demand-response rural transit, and intercity bus service. Transit ridership in the region was steadily increasing until the start of the COVID-19 pandemic. Investments in transit-supportive infrastructure and the addition of paratransit were major factors in generating greater ridership pre-pandemic.

Transit-related goals presented in the MTP were developed based on local public and stakeholder input as well as state and federal programs. Some of the listed goals are:

- Provide a system that improves the quality of life for all residents and protects the environment by reducing total vehicle miles traveled,
- Invest in a multimodal system that maximizes access and connectivity between modes of travel and to employment and activity centers and essential services,
- Promote the management and preservation of the existing transportation system by making the necessary improvements to accommodate for future growth in the community,
- Maximize mobility for all by investing in an integrated, connected, and accessible transportation system with improved transit services and ITS, and
- Provide a transportation network for local travel and tourism that supports regional connectivity.

There were no transit recommendations resulting from the HAMPO 2045 MTP, but it references the recommendations made in the 2018 Liberty Transit TDP. Additionally, "improved access to existing or planned transit" is listed as a performance measure in the project assessment framework presented in the MTP, and the public survey results reported in the plan demonstrate a public need and desire for an improved and expanded transit network.

6.9 Liberty Transit 2018-2021 Transit Development Plan

The Liberty Transit 2018-2021 TDP is an update to the 2012 TDP, the Liberty Transit Strategic Plan. The purpose of this update was to provide Liberty Transit with the opportunity to assess their system and the public's transportation needs in order to update their mission, goals, and objectives to address changes in the region.

The TDP consists of a review of existing conditions, an operations analysis and demand/needs assessment, a description of public and stakeholder engagement, and planning recommendations for the four-year period. Liberty Transit currently provides fixed-route bus service and paratransit to the urbanized portions of Liberty and Long Counties, including the cities of Hinesville, Flemington, Walthourville, and Fort Stewart. The TDP notes the fragmented condition of the region's multimodal network which limits the accessibility of the transit network.

In the TDP, Liberty Transit states a long-term goal to become a countywide system and regional transportation solution. Additional goals presented were:

- Expand ridership through strategic system modifications and targeted outreach,
- Explore opportunities to partner with municipalities in the HAMPO urbanized area to expand transit service where transit-supportive densities have been identified,
- Coordinate with local planning agencies to identify opportunities for service modifications to support new transit-oriented developments and employment destinations,
- Identify opportunities for regional transit partnerships to provide connectivity to surrounding urban areas, and
- Identify non-motorized infrastructure projects within the agency's service area and implement these projects using Section 5307 transit capital funding.

The TDP also presents various recommendations for achieving the stated transit goals and objectives:

- Restructure the full system route schedules to use a regular time-point structure,
- Reroute or extend service to new destinations including medical centers, human services, and shopping centers,

- Add buses to improve system-wide frequencies for fixed-route service,
- Implement shuttle or demand-response service in limited-service areas to provide direct connections to the urban core,
- Add limited weekend service to support local activity and tourist trips,
- Provide connections to other regional providers like Savannah and Chatham Area Transit services,
- Enhance outreach and promotional activities for seniors, low-income residents, students, and transit-supportive organizations, and
- Invest in technology like ITS, automated passenger counters, on-board Wi-Fi, and real-time vehicle tracking.

6.10 City of Brunswick Transit Service Plan

The City of Brunswick developed a Transit Service Plan in 2022 to summarize the planning, analysis, and outreach that has been done to develop and implement a local transit system. The plan includes a detailed analysis of transit service alternatives and options for management and funding.

Brunswick is a hub for government, medical, educational, and social activity and is a gateway to several barrier islands which are popular tourist destinations. There are no existing city-wide transit services. Coastal Regional Coaches provides service into and out of the city, but they cannot provide trips within Brunswick due to funding eligibility rules. Public input into the Transit Service Plan revealed that the lack of transit is a major barrier to accessing employment, education, and healthcare in the Brunswick area.

The plan presents a recommended transit alternative of city/county microtransit with a flex route to St. Simons Island. This service would provide on-call microtransit service to all of Brunswick and portions of Glynn County. In addition to microtransit service, the plan calls for investment in transit infrastructure to support the new system.

6.11 Effingham County Transportation Master Plan

Effingham County published their Transportation Master Plan (TMP) in 2021 to develop and prioritize improvement projects needed to address the existing issues and anticipated challenges of their transportation system. Effingham County is experiencing growth in population and development, raising concerns about traffic congestion and safety. In an effort to resolve these concerns, the TMP presents a needs assessment, technical traffic analysis, overview of project development, and a prioritized project list.

Currently, Coastal Regional Coaches is the only transit service provider in Effingham County. As the county continues to grow and densify, greater demand for transit is anticipated. More of the county is expected to become part of the CORE MPO planning area, allowing for collaboration and resources from CORE to develop transit solutions.

The TMP does not present any existing plans for transit in Effingham County, but it does include a brief transit policy guide to direct preliminary transit options. Recommendations include:

- Provide rideshare lots to encourage carpooling,
- Encourage employers to provide vanpooling service for workers, and
- Work with neighboring agencies to allow regional transit services to operate within Effingham County.

7.0 Existing Transit Services

The Coastal Georgia region is currently served by four transit systems, which include a regional rural demand-response service and three systems that focus on fixed-route bus service. The transit agencies that provide these services are detailed in the section below. All profiled agencies are open to the general public and are funded through local contributions, state funding, and FTA grant programs. Additional shared transportation services that target certain population groups such as seniors or those with disabilities also operate within the region.

7.1 Regional Services

Coastal Regional Coaches, a service of the Coastal Regional Commission, provides demand-response transit in all ten regional counties. Transit service is provided on weekdays between 7:00 AM and 5:00 PM. Weekend service is not currently available. Transit trips must be scheduled with CRC 24 hours in advance.

Fares are \$5 for a one-way trip within a rider’s county of origin, with an addition \$5 per additional county crossed.

As a rural transit operator, all trips provided by CRC must have at least one leg within a US Census-designated rural area. Trips with both their origin and destination within any urbanized areas are not eligible for CRC service and may use urban operators, such as Liberty Transit or Chatham Area Transit, for transportation needs.

Service statistics and performance measures for CRC are shown in **Figure 22**.

7.2 Local Services

The Coastal Georgia region is currently served by three local transit services. Details for these providers are given in the following section.

7.2.1 Statesboro Area Transit



On May 22, 2023, Statesboro Area Transit (SAT) began operating two routes across the city, including service to Georgia Southern University. Buses run Monday through Friday from 6:00 AM to 6:00 PM. With 24 hours’

advance notice, curbside pickup is available within a quarter mile of the established route. SAT is a service of the Coastal Regional Commission and is funded primarily through FTA’s Section 5311 grant program. Curb-to-curb service is available in Statesboro and Bulloch County through Coastal Regional Coaches.

Fares are \$1 per trip, with discounts available to seniors, college students, and individuals with disabilities.

As Statesboro Area Transit is a new transit service, annual operational data are not yet available.

7.2.2 Liberty Transit



Liberty Transit provides fixed-route bus and ADA paratransit service in the Hinesville-Fort Stewart area, including the cities of Flemington and Walthourville. Liberty Transit's

primary funding source is FTA's Section 5307 program. Operating in an urbanized area of under 200,000 residents, Liberty Transit is classified as a "small urban" system and is a subrecipient of GDOT.

Buses run Monday through Friday from approximately 6:00 AM to 8:00 PM along three routes and include service to Fort Stewart, though riders must show valid government ID to exit the bus while on the military installation. Regular bus fare is \$1, with a reduced fare of \$0.50 for seniors, Medicare cardholders, and persons with disabilities. Curb-to-curb paratransit service is available for \$2 for qualifying individuals. Liberty Transit offers unlimited day passes for \$2 and monthly passes for \$30 (\$15 for those eligible for reduced fares).

In-depth service statistics for Liberty Transit are provided in **Figure 23**.

7.2.3 Chatham Area Transit



Chatham Area Transit (CAT) operates in the Savannah metropolitan area, providing fixed-route bus and ADA paratransit service, along with the state's only

public passenger ferry service. Additionally, CAT offers a free downtown circulator in coordination with the City of Savannah. The Savannah area is classified as "large urban" and CAT is a direct recipient of FTA Section 5307 funding.

Bus service operates daily from 5:30 AM to 1:00 AM. Sunday service has reduced hours, from 6:00 AM to 9:00 PM. Bus fare is \$1.50, with paratransit rides costing \$2.00. Daily, weekly, and monthly passes, offering unlimited rides, are also available. A discount of 50 percent is available for seniors and those with disabilities.

The Savannah Belles Ferry Service connects the Savannah Convention Center on Hutcheson Island with two points along the downtown Savannah Riverwalk. Ferries run seven days a week from 7:00 AM to 10:00 PM and are free to users.

The dot Express Shuttle service uses two one-way loops to connect various locations in downtown Savannah and the Forsyth Park area. Shuttles run every ten minutes between 7:00 AM and 7:00 PM on weekdays, with reduced hours on weekends.

Service statistics for Chatham Area Transit, inclusive of all modes, are shown in **Figure 24**.

Figure 22: Coastal Regional Coaches Summary

Coastal Regional Coaches

Rural Public Transit Service (Section 5311)

SERVICE CHARACTERISTICS

- ✓ Service Type: Demand Response
- ✓ Service Area: Bryan, Bulloch, Camden, Chatham, Effingham, Glynn, Liberty, Long, McIntosh, and Screven

FARES

\$5

In County

\$5

Per Each Additional County

OPERATIONS SUMMARY

128,381 Trips in 2019

112,261 Annual Vehicle Revenue Hours

1,926,040 Annual Vehicle Revenue Miles

\$31.63 Average Cost Per Trip

\$36.17 Average Cost Per Hour

\$2.11 Average Expense Per Mile

OPERATING TIME

Monday-Friday 7am – 5pm



Available to all service area residents



Book 24 hours in advance

Fleet Size: 69 vehicles



x10

FUNDING

| | | |
|------------------------------------|--------------------|-------------|
| Fare Revenues | \$63,656 | 1.6% |
| Local Funds | \$0 | 0% |
| Federal Assistance and State Funds | \$2,237,208 | 55.1% |
| Other Funds | \$1,759,517 | 43.3% |
| Total Operating Funds | \$4,060,381 | 100% |

Sources of Operating Funds Expended

| | | |
|------------------------------------|------------------|-------------|
| Fare Revenues | \$0 | 0% |
| Local Funds | \$63,250 | 6.7% |
| Federal Assistance and State Funds | \$874,560 | 93.3% |
| Other Funds | \$0 | 0% |
| Total Operating Funds | \$937,810 | 100% |

Sources of Capital Funds Expended

Sources: Coastal Regional Commission Website, FTA National Transit Database, 2050 GDOT Rural and Human Services Transportation Plan

Figure 23: Liberty Transit Summary

Liberty Transit

Small Urban Public Transit Service (Section 5307)

SERVICE CHARACTERISTICS

- ✓ Service Type: Fixed Route, ADA Paratransit
- ✓ Service Area: Hinesville Urbanized Area

FARES

\$1

Regular Fare

\$2

Paratransit Fare

50%

Discount for Seniors and Persons with Disabilities

OPERATIONS SUMMARY

20,333 Trips in 2019

9,324

Annual Vehicle Revenue Hours

104,510

Annual Vehicle Revenue Miles

\$40.32 Average Cost Per Trip

\$87.93 Average Cost Per Hour

\$7.85 Average Expense Per Mile

OPERATING TIME

Monday-Friday 6am – 8pm



Available to **all service area residents**



Book paratransit **24 hours in advance**

Fleet Size: 4 vehicles



Sources: Liberty Transit Website, FTA National Transit Database, 2050 GDOT Rural and Human Services Transportation Plan

FUNDING

| | | |
|------------------------------------|------------------|-------------|
| Fare Revenues | \$17,915 | 2.2% |
| Local Funds | \$255,296 | 31.1% |
| Federal Assistance and State Funds | \$545,397 | 55.1% |
| Other Funds | \$1,286 | 0.2% |
| Total Operating Funds | \$819,894 | 100% |

Sources of Operating Funds Expended

| | | |
|------------------------------------|--------------------|-------------|
| Fare Revenues | \$0 | 0% |
| Local Funds | \$102,622 | 10.0% |
| Federal Assistance and State Funds | \$923,601 | 90.0% |
| Other Funds | \$0 | 0% |
| Total Operating Funds | \$1,026,223 | 100% |

Sources of Capital Funds Expended

Figure 24: Chatham Area Transit Summary

Coastal Regional Coaches

Rural Public Transit Service (Section 5311)

SERVICE CHARACTERISTICS

- ✓ Service Type: Demand Response
- ✓ Service Area: Bryan, Bulloch, Camden, Chatham, Effingham, Glynn, Liberty, Long, McIntosh, and Screven

FARES

\$5

In County

\$5

Per Each Additional County

OPERATIONS SUMMARY

128,381 Trips in 2019

112,261 Annual Vehicle Revenue Hours

1,926,040 Annual Vehicle Revenue Miles

\$31.63 Average Cost Per Trip

\$36.17 Average Cost Per Hour

\$2.11 Average Expense Per Mile

OPERATING TIME

Monday-Friday 7am - 5pm



Available to **all service area residents**



Book **24 hours in advance**

Fleet Size: 69 vehicles



x10

FUNDING

| | | |
|------------------------------------|--------------------|-------------|
| Fare Revenues | \$63,656 | 1.6% |
| Local Funds | \$0 | 0% |
| Federal Assistance and State Funds | \$2,237,208 | 55.1% |
| Other Funds | \$1,759,517 | 43.3% |
| Total Operating Funds | \$4,060,381 | 100% |

Sources of Operating Funds Expended

| | | |
|------------------------------------|------------------|-------------|
| Fare Revenues | \$0 | 0% |
| Local Funds | \$63,250 | 6.7% |
| Federal Assistance and State Funds | \$874,560 | 93.3% |
| Other Funds | \$0 | 0% |
| Total Operating Funds | \$937,810 | 100% |

Sources of Capital Funds Expended

Sources: Coastal Regional Commission Website, FTA National Transit Database, 2050 GDOT Rural and Human Services Transportation Plan

7.3 Transit Services in Surrounding Communities

Several transit agencies in surrounding communities were identified for peer comparison purposes. These agencies have similarities to the various systems located within Coastal Georgia and can provide useful performance measure comparisons and potential best practices.

The National Transit Database (NTD) provides standardized performance data for all federally funded transit agencies in the United States. Though the most recent available NTD dataset is from 2021, this report uses 2019 data. Due to the global COVID-19 pandemic, transit ridership was greatly reduced, so 2020 and 2021 data may not give an accurate representation of transit funding and operations.

7.3.1 Southwest Georgia Regional Transit

Southwest Georgia is currently served by one regional transit system. Southwest Georgia Regional Transit (SWGRT) provides demand-response transit service to Baker, Calhoun, Colquitt, Decatur, Dougherty, Early, Grady, Lee, Miller, Mitchell, Seminole, Terrell, and Worth Counties.

Service is provided on weekdays between the hours of 6:00 AM and 8:00 PM. Fares are \$3.00 for trips less than 10 miles within a single county. Trips over 10 miles are \$5.00 and trips that cross county lines are \$5.00 plus \$0.50 per mile over 10 miles. SWGRT offers a 50% discount for seniors and frequent riders.

7.3.2 Three Rivers Regional Commission Transit

The Three Rivers Regional Commission provides transit service to seven counties across three programs. Regionalized demand-response transit service is provided by the Three Rivers Regional Commission Transit Program to Butts, Lamar, Pike, Spalding, and Upson Counties. The Carroll Connection service provides demand-response trips in Carroll County. The Meriwether County Transit Program operates in Meriwether County, with service to select cities outside of the county.

Transit service for all three programs operates on weekdays between the hours of 8:00 AM and 5:00 PM. Fares are \$2.00 for riders of the regional transit program. Carroll Connection fares are \$3.00, and fares for Meriwether County riders are \$3.00, or \$10.00 for out-of-county trips.

7.3.3 Macon-Bibb County Transit Authority

Macon-Bibb County Transit Authority (MTA) offers fixed-route service along nine routes, two of which are also served by limited-stop express buses. MTA also runs a shuttle service connecting the Mercer University campus with Downtown Macon. Most routes run from around 5:30 AM to 9:00 PM Monday through Friday. Saturday service ends around 7:00 PM for most routes.

Fares are \$1.25 one way, with a \$0.50 fee to transfer buses. Paratransit rides are \$2.50. Reduced fares are available for students, children, and seniors. For frequent riders, ride passes and unlimited monthly passes are also available at discounted prices.

7.3.4 Rome Transit Department

The Rome Transit Department (RTD) provides fixed-route bus service to the general public across six routes within the Rome city limits. RTD also operates ADA comparable paratransit service for qualifying individuals. Most routes run hourly from 5:40 AM to 6:30 PM Monday through Friday. There is currently no weekend service.

Fares are \$1.25 per trip with free transfers. Paratransit rides are \$2.25. Reduced fares are available to seniors, disabled, and student riders for \$0.60 per trip. Children ride for free.

7.3.5 Albany Transit System

The Albany Transit System (ATS) operates 11 city bus routes within the Albany urbanized area, as well as the Ram Rush, a dedicated shuttle that moves students between the East and West Campuses of Albany State University. ATS also operates ADA comparable paratransit service for those unable to ride ATS fixed-route service.

Most routes run hourly between 5:00 AM and 7:00 PM during weekdays, with service starting at 6:00 AM on Saturdays. The Ram Rush operates every 45 minutes from 6:45 AM to 9:40 PM. There is currently no Sunday service. Fares are \$1.70 per trip, with seniors and children's fares available for \$0.50. Monthly passes are available for \$45.00.

7.3.6 Columbus Metropolitan Transit System

The Columbus Metropolitan (METRA) Transit System serves the general public within the City of Columbus, with service to the US Army installation at Fort Benning. Fort Benning and Columbus make up the entirety of the area of Muscogee County. METRA provides fixed-route bus service to the general public across ten routes, as well as ADA comparable paratransit service for qualifying individuals. Services operate between 4:30 AM and 8:30 PM Monday through Saturday. Standard adult fare is \$1.30, with reduced fares available to students and seniors. Weekly, biweekly, and monthly passes are also available.

7.4 Performance Measures

Along with US Census data, NTD datasets can be used to analyze performance measures that track how efficiently or effectively transit systems operate. Though performance measures are effective in quantifying operational characteristics of transit operators, every community and every transit operator faces a different series of operating conditions and challenges. Recognizing that these performance measures cannot convey every aspect of a system's operation is an important factor in analyzing systems' past operation.

Table 19 shows several performance measures for the three transit operators in Coastal Georgia, as well as data for the peer systems discussed above.

Table 19: Performance Metrics for Coastal Georgia Transit Systems and Selected Peers (2019)

| | CRC Peer Performance | | | Liberty Transit Peer Performance | | | CAT Peer Performance | | |
|----------------------------------|----------------------|-------------|--------------|----------------------------------|-------------|-------------|----------------------|-------------|-------------|
| | CRC | SWGRT | TRRC Transit | Liberty Transit | MTA | RTD | CAT | ATS | METRA |
| Service Data | | | | | | | | | |
| Service Area Population | 562,658 | 228,115 | 290,920 | 38,223 | 153,691 | 36,323 | 237,736 | 75,616 | 230,208 |
| Population Density (per sq. mi.) | 95.98 | 53.64 | 138.26 | 1,194.47 | 2,195.59 | 1,135.09 | 724.80 | 4,448.00 | 1,744.00 |
| Annual Operating Budget | \$4,060,381 | \$5,461,549 | \$1,726,030 | \$819,893 | \$5,639,721 | \$3,327,417 | \$24,073,935 | \$4,235,167 | \$4,768,349 |
| Unlinked Passenger Trips | 128,381 | 261,694 | 95,634 | 20,333 | 592,201 | 1,113,342 | 4,069,157 | 773,757 | 1,313,727 |
| Vehicle Revenue Miles | 1,926,040 | 3,049,020 | 773,450 | 104,510 | 1,119,955 | 639,412 | 3,491,215 | 746,895 | 1,413,534 |
| Vehicle Revenue Hours | 112,261 | 152,930 | 43,660 | 9,324 | 64,260 | 40,585 | 259,730 | 46,127 | 120,027 |
| Population Metrics | | | | | | | | | |
| Trips per Capita | 0.23 | 1.15 | 0.33 | 0.53 | 3.85 | 30.65 | 17.12 | 10.23 | 5.71 |
| Revenue Hours per Capita | 0.20 | 0.67 | 0.15 | 0.24 | 0.42 | 1.12 | 1.09 | 0.61 | 0.52 |
| Cost Metrics | | | | | | | | | |
| Cost per Trip | \$31.63 | \$20.87 | \$18.05 | \$40.32 | \$9.52 | \$2.99 | \$5.92 | \$5.47 | \$3.63 |
| Cost per Mile | \$2.11 | \$1.79 | \$2.23 | \$7.85 | \$5.04 | \$5.20 | \$6.90 | \$5.67 | \$3.37 |
| Cost per Hour | \$36.17 | \$35.71 | \$39.53 | \$87.93 | \$87.76 | \$81.99 | \$92.69 | \$91.82 | \$39.73 |
| Fare Metrics | | | | | | | | | |
| Fare Revenue per Trip | \$0.50 | \$0.46 | \$0.28 | \$0.88 | \$1.03 | \$0.72 | \$1.39 | \$1.03 | \$0.76 |
| Recovery Ratio | 1.6% | 2.2% | 1.6% | 2.2% | 10.8% | 24.1% | 23.5% | 18.8% | 20.9% |

Source: FTA National Transit Database, 2019 Annual Data Tables

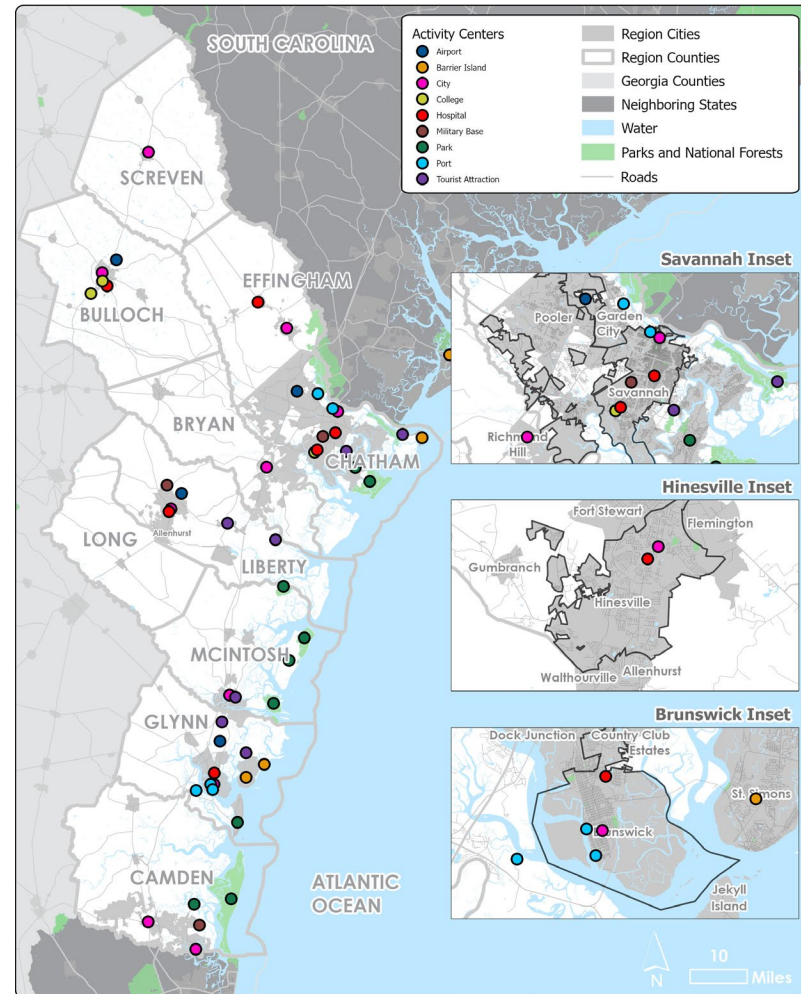
8.0 Transit-Supportive Land Use and Development

This section analyzes zoning and land uses in Coastal Georgia to determine where transit-supportive land uses are within the region and where future development could occur. In addition to land uses and zoning, key destinations and essential services, Developments of Regional Impact, affordable housing, and senior centers are also identified and discussed in this section.

8.1 Existing Land Use and Zoning

Comprehensive existing land use data for the Coastal Region was not available. However, key activity centers were provided for every county in the region except for Long County where no activity centers are present. As shown in **Figure 25**, activity centers like cities, colleges, hospitals, and military bases can be considered transit-friendly due to high concentrations of people. These can be found in near downtown Savannah in Chatham County, in Hinesville in western Liberty County, and in Darien in McIntosh County. Airports and ports can also be considered transit-friendly because they are major employers for the region. These centers are located in Statesboro in Bulloch County, in Savannah in Chatham County, in Hinesville in Liberty County, and in Brunswick in Glynn County.

Figure 25: Existing Land Use



Source: Coastal Regional Commission

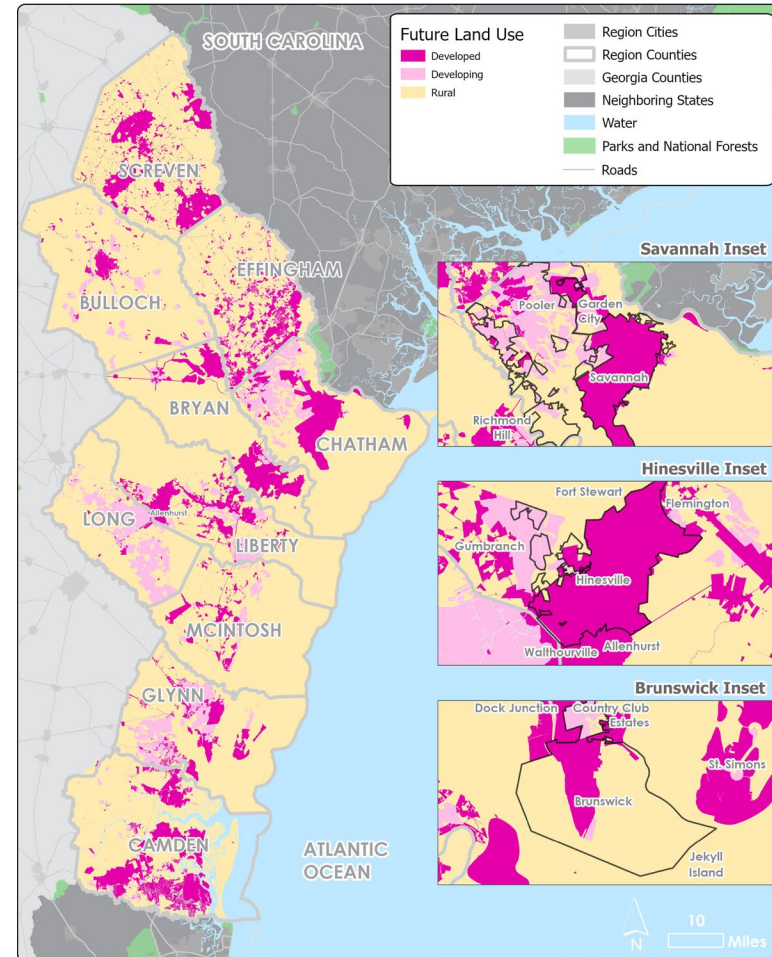
8.2 Future Land Use and Projected Development Patterns

Future land use for the Coastal Georgia region consists of the following areas:

- **Developed:** Areas that currently exhibit urban development patterns and currently have access to urban services. These areas typically include higher density residential areas along with industrial and commercial developments.
- **Developing:** Areas that are expected to urbanize and require provision of new urban services in the next 20 years. These services will include water and sewer service at a minimum.
- **Rural:** Areas that are not expected to urbanize or require urban services in the next 20 years. These areas are characterized by sparsely developed non-urban areas where the land is primarily used for farming, forestry, very low density residential or open space uses.⁵

Most cities are developed and surrounded by rural areas throughout the counties in the region. Developing areas are located adjacent to Statesboro in Bulloch County; in western Chatham County; adjacent to Hinesville, Midway, and Riceboro in Liberty County; throughout Long County; along Interstate 95 in McIntosh County; and in western Glynn County.

Figure 26: Projected Development Patterns



Source: Coastal Regional Commission

⁵ 2022 Regional Plan, Coastal Regional Commission, <https://crc-planning-hub-segrass.hub.arcgis.com/documents/34dec8321f4a418ebfcc4417e45a148/explore>

8.3 Key Destinations and Essential Services

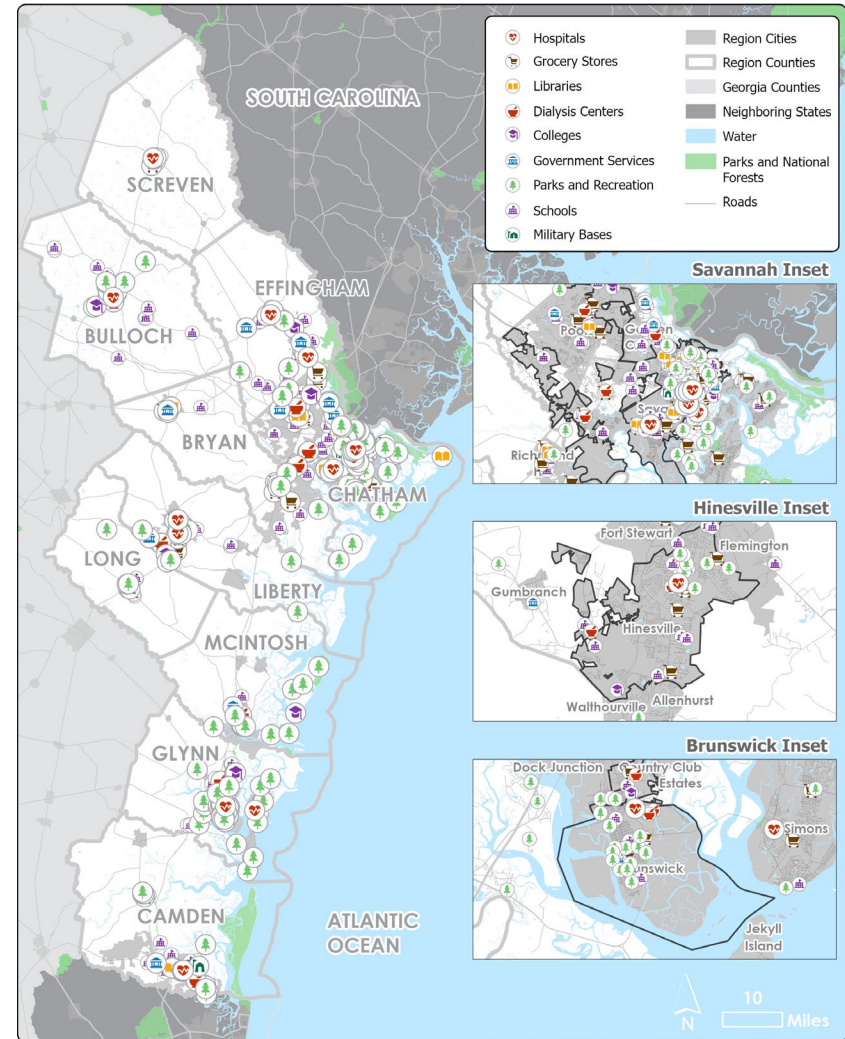
Key destinations and essential services are used by residents or visitors for commercial, social, religious, public safety, recreation, or governmental needs. This region has a total 424 key destinations and resources. Each county has schools, grocery stores, libraries, and government facilities. Bryan and Long Counties do not have access to medical facilities (hospitals or dialysis centers) within their own counties. Residents of Bryan County must travel to nearby Bullock, Effingham, Chatham, and Liberty Counties for both medical facility types, while residents of Long County must travel to Liberty County for both hospitals and dialysis centers, and to McIntosh County for a dialysis center. The region has three military bases, with one base apiece located in Chatham, Liberty, and Camden Counties. The top three most common destinations are schools (34.7 percent), parks and recreation (26.4 percent), and grocery stores (13.4 percent). All services can be accessed through transit in the region.

Table 20: Key Destinations and Essential Services

| Type | Number of Services | Percent of Total Services |
|----------------------|--------------------|---------------------------|
| Hospitals | 18 | 4.2% |
| Grocery Stores | 57 | 13.4% |
| Libraries | 25 | 5.9% |
| Dialysis Centers | 20 | 4.7% |
| Colleges | 12 | 2.8% |
| Government Services | 31 | 7.3% |
| Parks and Recreation | 112 | 26.4% |
| Schools | 147 | 34.6% |
| Military Bases | 3 | 0.7% |
| Total | 425 | 100.0% |

Source: Coastal Regional Commission

Figure 27: Key Destinations and Essential Services



Source: Coastal Regional Commission

8.4 Developments of Regional Impact

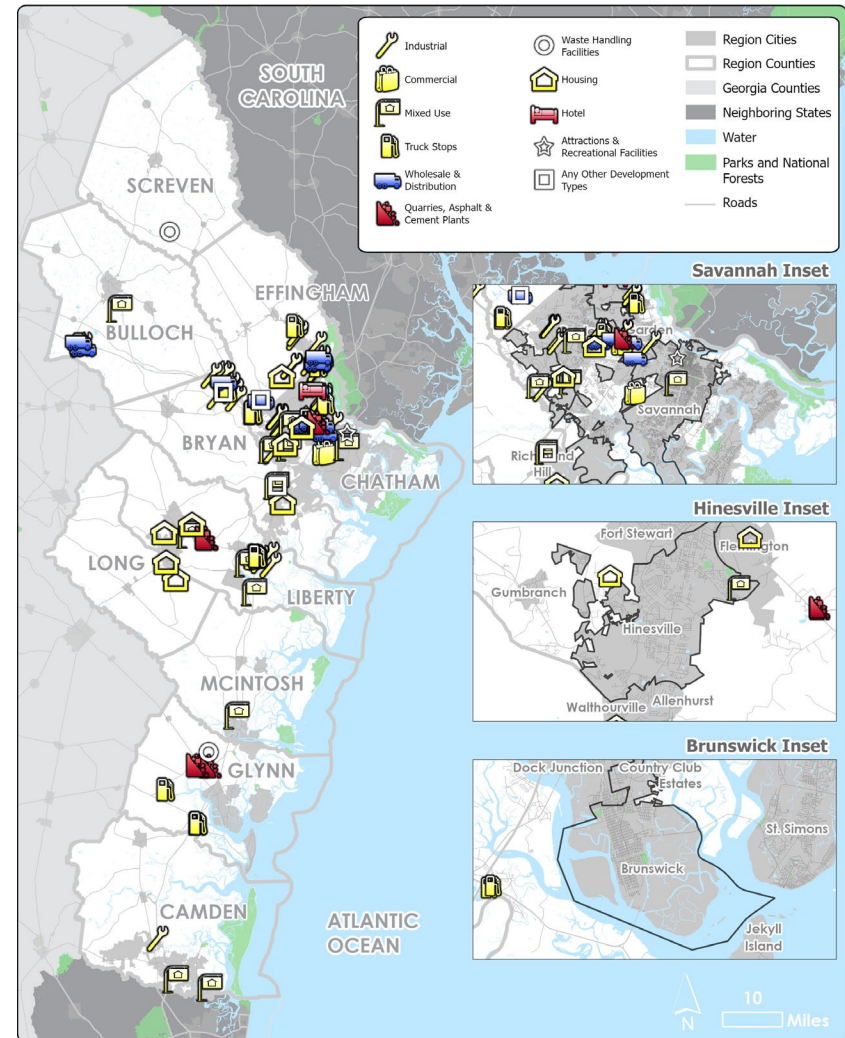
Developments of Regional Impact (DRIs) are large-scale developments that are likely to have regional effects beyond the local government’s jurisdiction. According to the Georgia Department of Community Affairs, there are 100 DRIs in the region, with Chatham County accounting for one third of these DRIs. A number of these DRIs are related to the Bryan County megasite development, future home of a Hyundai electric vehicle plant and numbers supplier and support facilities, posing multiple transportation challenges. Mixed-use DRIs, which are conducive to transit service, are located in Bryan, Bulloch, Camden, Chatham, Liberty, and McIntosh Counties.

Table 21: Developments of Regional Impact Within Last 5 Years

| County | Number* | Types | Status |
|------------------|---------|---|------------------------------------|
| Bryan | 14 | Industrial, Mixed Use, Truck Stops, Wholesale, Other | 13 Completed, 1 Determination Made |
| Bulloch | 5 | Industrial, Mixed Use, Truck Stops, Wholesale | All Completed |
| Camden | 3 | Mixed Use | All Completed |
| Chatham | 33 | Attractions, Commercial, Hotel, Housing, Industrial, Mixed Use, Quarry/Plant, Wholesale | 30 Completed, 3 Determination Made |
| Effingham | 21 | Housing, Industrial, Truck Stops, Wholesale, Other | All Completed |
| Glynn | 6 | Quarry/Plant, Truck Stops, Waste Facilities | 5 Completed, 1 Form Submitted |
| Liberty | 15 | Commercial, Housing, Industrial, Mixed Use, Quarry/Plant, Truck Stops | All Completed |
| Long | 1 | Housing | All Completed |
| McIntosh | 1 | Mixed Use | All Completed |
| Screven | 1 | Waste Facility | All Completed |

Source: Georgia Department of Community Affairs
 *Excludes DRIs with withdrawn applications.

Figure 28: Developments of Regional Impact



Source: Georgia Department of Community Affairs

8.5 Affordable Housing Initiatives

Affordable housing initiatives consist of Low-Income Housing Tax Credits (LIHTC) properties, multi-family assisted properties, and public housing properties. LIHTC properties are properties that have been acquired, rehabilitated, or newly constructed from tax credits to provide rental housing for lower-income households. Multi-family assisted properties consist of United States Department of Housing and Urban Development (HUD) subsidized multifamily rental housing properties with five or more dwelling units. These typically include apartments or town houses, but can also include nursing homes, hospitals, elderly housing, mobile home parks, retirement service centers, and occasionally vacant land. For this section, housing and properties for the elderly have been excluded and are analyzed separately in **Section 8.6**. Public housing properties are housing with aid administered from HUD for low-income residents at rents they can afford.

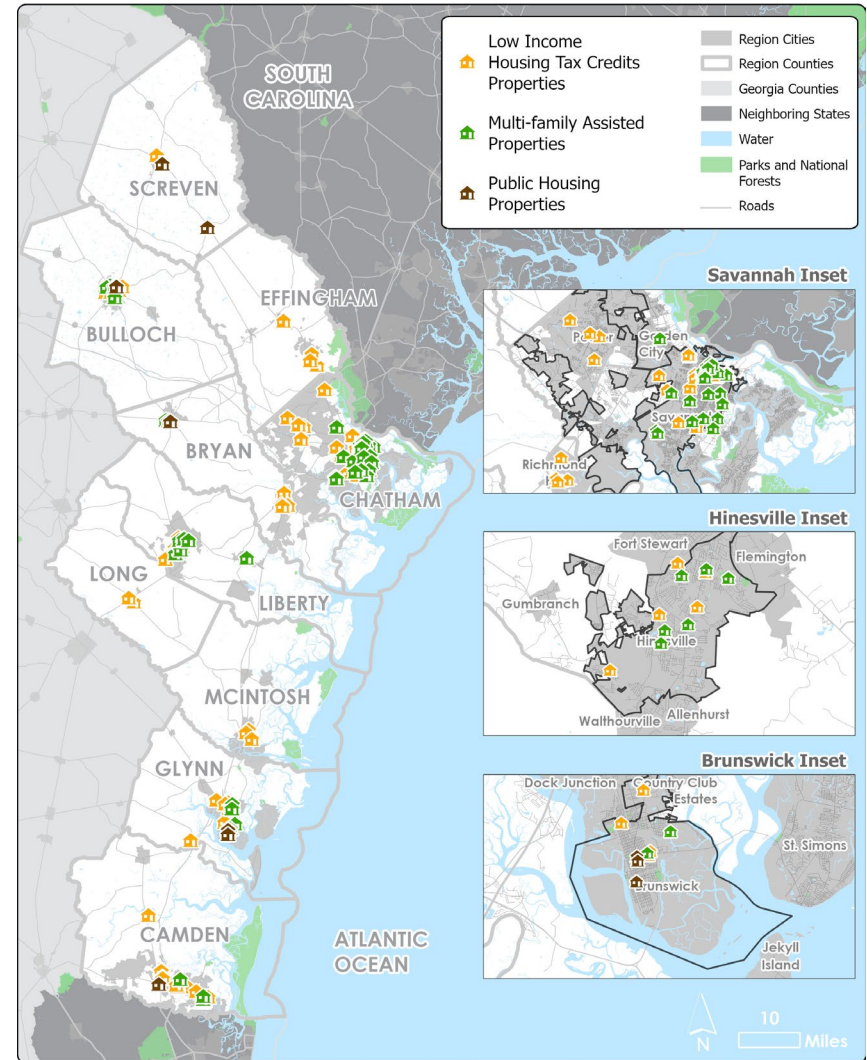
Affordable housing amounts to less than 0.1 percent of the housing in the region, which consists of a total of 315,859 occupied housing units. Most of the affordable housing in the region is LIHTC (62.7 percent), followed by multi-family assisted (32.0 percent), and then by public housing (5.3 percent). Most of the housing is located within city and town limits.

Table 22: Affordable Housing Initiatives

| Property Type | Number of Properties | Percent of Total Properties |
|--------------------------------|----------------------|-----------------------------|
| Low-Income Housing Tax Credits | 94 | 62.7% |
| Multi-Family Assisted | 48 | 32.0% |
| Public Housing | 8 | 5.3% |
| Total | 150 | 100.0% |

Source: U.S. Department of Housing and Urban Development, 2021 ACS 5-Year Data

Figure 29: Affordable Housing Initiatives



8.6 Aging Initiatives and Senior Centers

Elderly assisted properties are HUD-subsidized multifamily housing properties specifically for the elderly, excluding insured hospitals with active loans. Nursing homes and assisted living residences are either publicly owned (by the county, for example) or privately owned buildings with multiple dwelling units. In addition to the elderly assisted properties and nursing homes/assisted living residences, there are personal care homes that are privately owned residences, usually containing fewer than six beds for elderly persons. All of these centers require a license from the Georgia Department of Community Health (DCH).

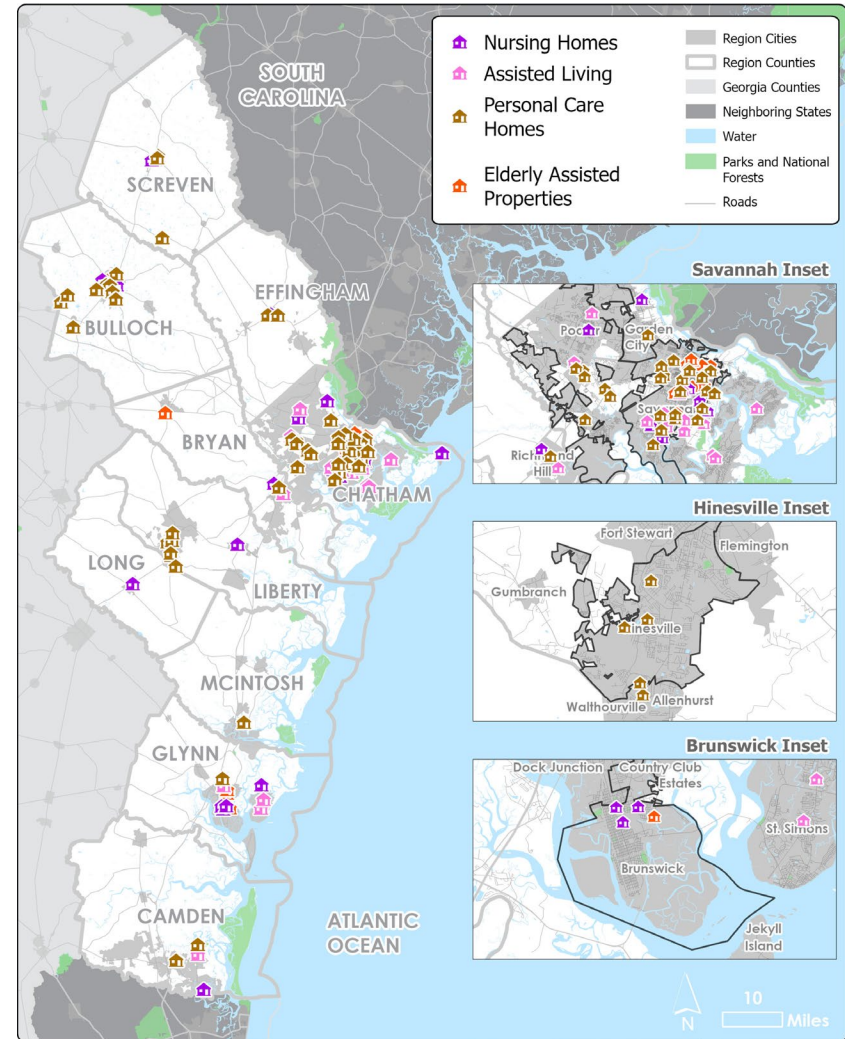
There are a total of 113 senior centers in the region. Most of the centers are personal care homes (51.3 percent), secondly nursing homes (23.9 percent), thirdly assisted living residences (16.8 percent), and lastly elderly assisted properties (8.0 percent). The location of the centers does not fall within high elderly population census tracts, except in Glynn and Chatham Counties. Most centers are located within city and town limits.

Table 23: Aging Initiatives and Senior Centers

| Property Type | Number of Properties | Percent of Total Properties |
|----------------------------|----------------------|-----------------------------|
| Nursing Homes | 27 | 23.9% |
| Assisted Living Residences | 19 | 16.8% |
| Personal Care Homes | 58 | 51.3% |
| Elderly Assisted | 9 | 8.0% |
| Total | 113 | 100.0% |

Source: U.S. Department of Housing and Urban Development and Georgia Department of Community Health

Figure 30: Aging Initiatives and Senior Centers



Source: U.S. Department of Housing and Urban Development and Georgia Department of Community Health

9.0 Transit Funding

9.1 Existing Funding for Transit

Public transit in the State of Georgia is funded through several sources, including federal, state, and local funds. Direct revenue, such as fares and coordinated purchased transportation, provide another source of income.

The Infrastructure Investment and Jobs Act (IIJA) of 2021 greatly increases federal outlays for transit funding. Federal grants fall into two categories: formula, which allocates funds based on certain characteristics of the areas receiving funding, and competitive, which require agencies or governments seeking funding to apply for it. In most cases, regardless of grant type, recipients must demonstrate the ability to provide local matching funds covering some portion of project costs.

In addition to the higher levels of transit funding available through the IIJA, the Inflation Reduction Act (IRA) of 2022 further increased federal support for transit projects throughout the country. The IRA establishes and extends a range of competitive grant programs and tax credits for zero-emission vehicles, charging infrastructure, and alternative fuels. These funds may be used to help transition transit fleets to battery electric or hydrogen fuel cell fleets, among other uses.

9.1.1 Section 5311 Rural Formula Funding

FTA provides Section 5311 Rural Public Transportation Funding to GDOT to administer to non-urbanized areas with a population of less than 50,000. This funding requires a local match and can be used to provide transit services for all residents and trip types. Funds are allocated based on an area’s size, population, low-income population, and revenue vehicle miles. Section 5311 funds can be used for capital, operating, planning, and job access related activities. The federal share is up to 80 percent for capital projects and 50 percent for operating costs; local or state funds must be used to make up the remaining costs. Purchase-of-service contracts can be counted toward local match, allowing coordinated Section 5311 systems to use Human Services Transportation funding to cover substantial portions of the required local match. Historically, the State of Georgia has provided a 10 percent capital funds match for the purchase of rural transit buses.

Table 24: Section 5311 Rural Distributions in Coastal Georgia

| Funding Recipient | 2019 | 2020 | 2021 | 2022 |
|-----------------------------|---------|---------|---------|---------|
| Coastal Regional Commission | \$2.39M | \$2.01M | \$3.62M | \$2.52M |

Source: National Transit Database

9.1.2 Section 5307 Urban Formula Funding

Formula funding for urban areas is provided through the Section 5307 Urban program. Within Georgia, GDOT serves as the designated recipient for Section 5307 funds allocated to urban areas with populations under 200,000. Section 5307 provides up to 80 percent of capital funding. Though large urban systems may not use Section 5307 funds for operating expenses, urban areas with populations below 200,000 may use Section 5307 to fund up to 75 percent of operating budgets.

Table 25: Section 5307 Urban Distributions in Coastal Georgia

| Funding Recipient | 2019 | 2020 | 2021 | 2022 | 2023 |
|----------------------|---------|---------|---------|---------|---------|
| Chatham Area Transit | \$3.72M | \$3.67M | \$3.82M | \$4.91M | \$5.00M |
| Liberty Transit | \$0.72M | \$0.75M | \$1.09M | \$1.15M | \$1.17M |

Source: Georgia Department of Transportation

9.1.3 Georgia Transit Trust Fund

The Georgia Transit Trust Fund Program (TTFP) is a funding program administered by GDOT that uses a population-based formula to distribute state funds to Georgia’s counties that have existing transit service. Multi-county transit agencies also receive funding distributions based on population, and counties with household incomes below \$45,000 receive additional appropriations. The TTFP is funded through a tax levied on rideshare services and other for-hire ground transportation, as passed by the Georgia General Assembly in 2020. Georgia’s fiscal year 2024 budget is the first budget to distribute these funds to transit agencies statewide, with funds eligible to be used to support both capital and operating expenses.

Table 26: Georgia Transit Trust Fund Program Distributions in Coastal Georgia

| Funding Recipient | 2024 |
|-------------------------------------|--------------------|
| Chatham Area Transit | \$396,664 |
| Coastal Regional Commission Transit | \$1,220,519 |
| Liberty Transit | \$87,658 |
| Coastal Georgia Total | \$1,704,841 |

Source: Georgia Department of Transportation

9.3 Transit Funding Opportunities

FTA formula funds account for the bulk of transit funding, especially in rural areas. However, FTA provides a number of competitive grant programs that transit agencies may use to leverage additional funding. Section 5339, the Grants for Buses and Bus Facilities Program, consists of one formula and two competitive grants. The first, 5339(a), allocates formula funding for capital projects involving the replacement, rehabilitation, or purchase of buses, vans, and bus-related equipment, or for the construction of bus-related facilities to support fixed-route transit service. The other grant under this program is 5339(c), the Low or No Emission Vehicle Program. This competitive grant program provides federal funding for the purchase or lease of or zero-emission or low-emission transit buses and the acquisition, construction, and leasing of required supporting facilities. Federal funds can cover up to 85 percent of the cost of acquiring transit buses and up to 90 percent of the costs associated with acquiring related equipment and facilities.

In January 2021, the Justice40 Initiative outlined the goal of providing 40 percent of federal transportation investment to disadvantaged communities. Many FTA grant programs are being retooled to meet these priorities. The largest of these programs is the Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grant program. RAISE grants are aimed at major capital projects that address climate change, equity concerns, and barriers to opportunity. Over \$5.4 billion in RAISE grants have been awarded over the past three years, with \$983 million awarded to 90 projects in 2021, \$2.2 billion awarded to 166 projects in 2022, and \$2.3 billion awarded to 162 projects in 2023. As additional competitive programs come online, FTA will update their Justice40 website.⁶

⁶ www.transportation.gov/equity-Justice40

10.0 Key Findings and Next Steps

This section summarizes key findings from the Existing Conditions Report. These findings, along with feedback from stakeholders and public involvement activities, are critical to identifying regional transit needs. This section also provides further guidance on the next stage of the Regional TDP.

10.1 Key Findings

- Overall, McIntosh County has a high concentration of transit market demographics in its low-income, elderly, and disabled populations.
 - High concentrations of low-income populations are found in McIntosh County and in the Brunswick, Savannah, and Statesboro areas.
 - High concentrations of elderly populations are found in McIntosh County and in the St. Simon's Island and Tybee Island beach communities.
 - High concentrations of zero-car households are found in Camden County and in the Brunswick, Ludowici, Savannah, and Statesboro areas.
 - High concentrations of populations with a disability are found in Liberty, Long, and McIntosh Counties.
 - Screven and McIntosh Counties contain the greatest number of transportation disadvantaged census tracts.
- Unemployment in the region is higher than the state average and found at the highest concentration in Bulloch and Chatham Counties.
- Population projections show the region experiencing robust growth over the next 40 years, with eight out of ten counties expected to increase in population. Only McIntosh and Screven Counties are projected to experience slight dips in population by 3.1 percent and 3.7 percent, respectively. The region as a whole is projected to grow by 32.7 percent by 2060, exceeding the state's projected growth rate of 31.1 percent over the same time period.
- Key destinations and essential services that can support transit are more commonly found in the Brunswick, Hinesville, Savannah, and Statesboro areas.
- Regionalized rural transit service covers the entirety of Coastal Georgia.
- The largely regionalized nature of Coastal Georgia's transit service is aligned with statewide transportation and transit plans that emphasize cross-county trips and regional partnerships between providers.
- Coastal Regional Coaches performs comparably to peer systems in areas similar to Coastal Georgia. The performance of the region's urban systems varies when compared to similar systems in the state, with CAT exceeding the performance of peers in population and fare metrics and Liberty Transit slightly underperforming across all metrics.
- Most trips in Coastal Georgia start and end within the same county (87 percent). Inter-county trips are also common, with Chatham, Effingham, and Bryan Counties as the top destinations.

- Of all the transit providers in the region, only Coastal Regional Coaches is utilizing the Let's Ride smartphone application for transit trip reservations and scheduling. There is an opportunity to better leverage technology to facilitate transit access in the future. Broadband access and accessibility for older adults are important considerations for implementation.
- There are several medical facilities in the region, including Candler Hospital, Savannah Health Services LLC (doing business as Memorial Health University Medical Center), and Southeast Georgia Health System locations. Bryan and Long County residents do not have direct access to hospitals or dialysis centers within their counties, but neighboring services can be accessed through transit in the region.
- GSU has the highest enrollment of higher education facilities in the region with its 2021 enrollment of approximately 27,080 students. SCAD has the second-highest enrollment in the region with approximately 15,640 students. Both institutions place in the top ten largest employers in the region.

- The region's largest employers in hospitality, healthcare, and warehousing are projected to continue creating job opportunities for Coastal Georgia's labor force.
- There are park and ride lots that could serve as regional multimodal hubs or transit transfer points between county systems.
- New funding programs at the federal level, particularly those tied to the Justice40 Initiative, may present opportunities for transit service expansion and enhancement to better serve disadvantaged populations.

10.2 Next Steps

The Existing Conditions Report provides a foundation to identify and prioritize the transit needs for each county as well as the Coastal Georgia region. This documentation and analysis will be utilized in the next steps in Regional TDP development, including the Vision and Goals Statement, in coordination with stakeholder and public input, and the Alternatives Analysis and Recommendations Report.