



NORTHERN KENTUCKY  
AREA DEVELOPMENT DISTRICT

# Coordinated Regional Transit Study

Executive Summary

February 2025



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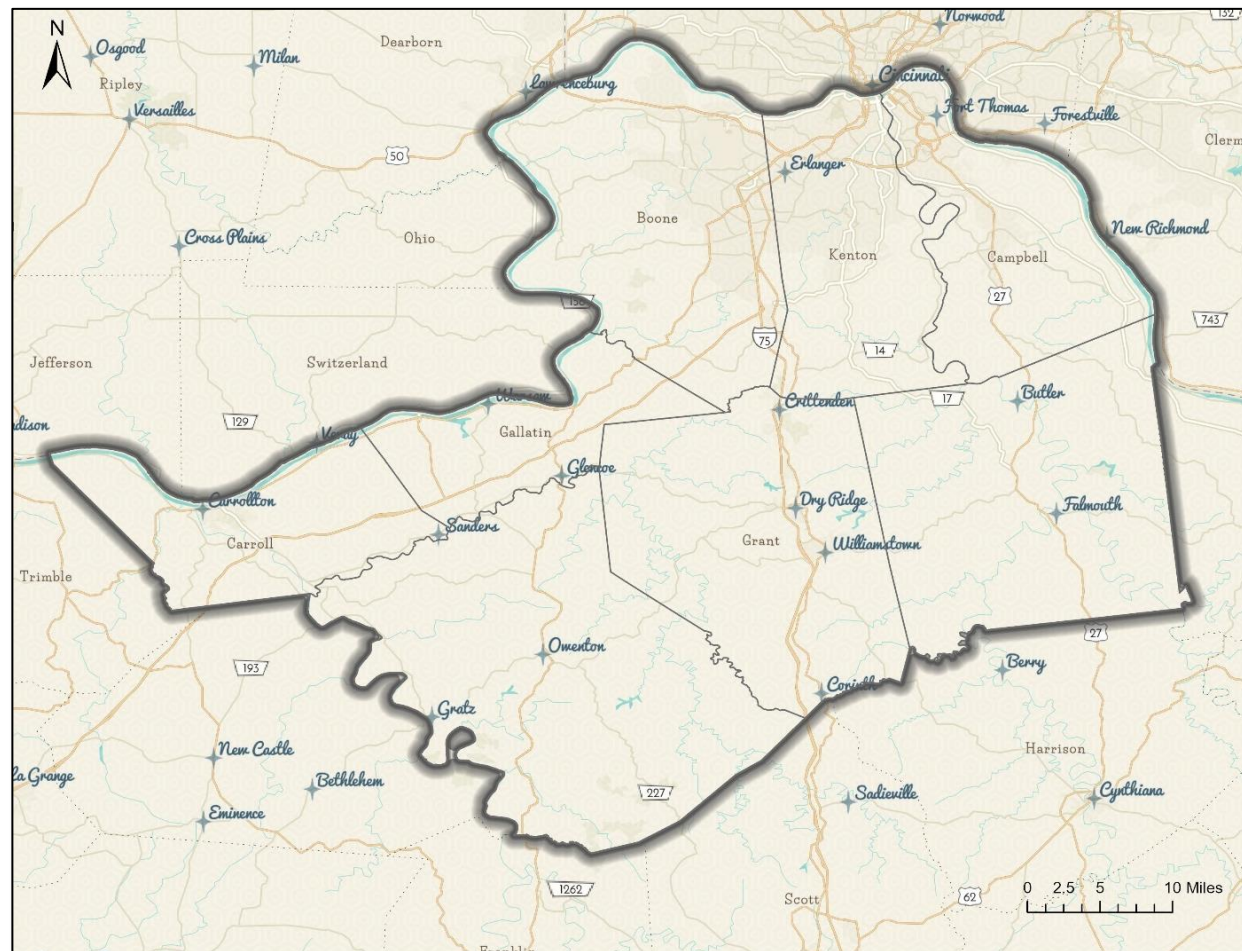
## 1 INTRODUCTION

The Northern Kentucky Area Development District (NKADD) completed a Coordinated Regional Transit Study with the overall goal of working together to foster a coordinated system that meets a greater need.

By promoting collaboration among local governments, transportation providers, and community stakeholders, the study seeks to break down barriers to mobility, improve access to essential services such as healthcare, education, and employment, and ensure that transportation options align with the growth and demographic shifts occurring within the region.

The Coordinated Regional Transit Study serves as a comprehensive framework for enhancing mobility and coordination between transportation providers across the NKADD region, covering Boone, Campbell, Carroll, Gallatin, Grant, Kenton, Owen, and Pendleton counties. This study evaluates the existing transportation services, identifies gaps, and provides actionable recommendations to meet the evolving transit needs.

NORTHERN KENTUCKY DEVELOPMENT DISTRICT SERVICE AREA



## 2 EXISTING SERVICES

The existing service providers were reviewed for their service specifications and performance indicators, if available. The following section summarizes the providers operating in the study region.

### 2.1 Transit Authority of Northern Kentucky

The Transit Authority of Northern Kentucky (TANK) serves Boone, Kenton, Campbell counties, which also extends north to Cincinnati. TANK provides a variety of transit options, including local and express bus routes, shuttle services, paratransit, and an on-demand micro transit program scheduled to launch in Fall 2024 in the Fort Thomas and Cold Spring areas.

TANK VEHICLE FOR ON-DEMAND SERVICE



### 2.2 Rural Service Providers

Transit services in the rural areas in Carroll, Gallatin, Grant, Owen, and Pendleton Counties are provided by non-profit, for profit, and governmental agencies shown on the right side of this page.



**BAWAC:** Offers employment services and free same-day, door-to-door transportation for Medicaid Waiver consumers in Boone, Campbell, Gallatin, Grant, Kenton, and Pendleton counties. Supports trips for medical, employment, training, life maintenance, and social purposes.



**Owen County Public Transit (OCPT):** Provides Medicaid and non-emergency medical transportation, public transit, and veteran transport in Owen and Grant counties, extending to larger cities for medical, shopping, and employment needs.



**Carroll County Wellness Transit (CCWT):** Operated by Carroll County Memorial Hospital, offers scheduled transportation for hospital discharge and follow-up visits.



**City Care Pickup:** Florence-based provider offering non-emergency medical transportation (NEMT) across Kenton, Campbell, and Boone counties. Round trips cost \$104.



**Express Mobile Transportation:** Provides door-to-door transport for seniors and mobility-challenged individuals in the greater Cincinnati area. Fare is mileage and wait-time-based.

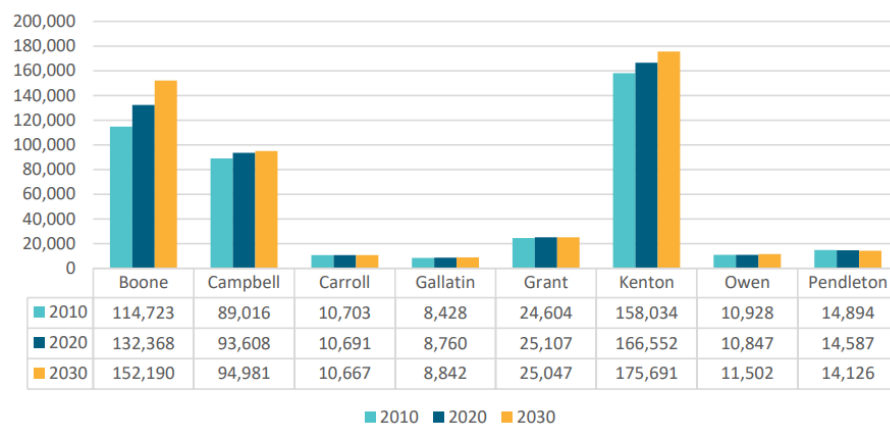


**Providers Outside the NKADD Region:** Includes Metro, Federated Transportation Services of the Bluegrass (FTSB), and Bluegrass RIDE, with FTSB serving some NEMT trips in NKADD's southern counties.

### 3 POPULATION AND ACTIVITY CENTERS

Population trends and projections were analyzed using data from the ACS 5-Year Estimates and the Kentucky State Data Center. Boone, Kenton, and Campbell counties are the largest in terms of both size and population. The population is expected to grow in most counties within the NKADD region, with Boone and Kenton counties anticipated to experience the most growth. However, Pendleton, Carroll, and Grant counties are projected to see a decrease in population between 2022 and 2030.

POPULATION TRENDS AND PROJECTION

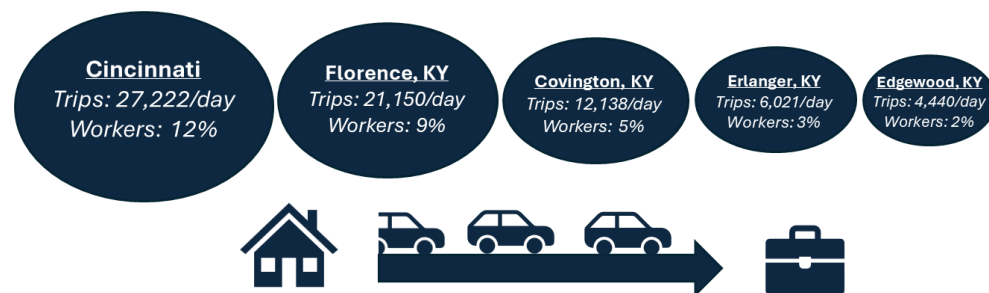


Employment and activity centers are also a key consideration for transit planning, serving as hubs for work, errands, and other daily needs. Access to these centers is especially vital for individuals without personal vehicles or the ability to drive. The following provides some examples of these key activity centers.

- Shopping centers such as Walmart and Kroger (Carrollton, Frankfort, Georgetown, Dry Ridge, Alexandria, Independence, Florence).
- Hospitals such as St. Elizabeth (Owenton, Williamstown, Falmouth, Crittenden, Edgewood, Florence).
- Senior center offering community meals and activities (Florence, Owenton, Falmouth, Carrollton, Williamstown).

Data on employment density, job types, and commuter patterns were collected to understand where workers are located, the nature of their work, and their travel destinations. As shown in the graphic below, the largest share of residents within the NKADD region work in Cincinnati, followed by Florence in Boone County. Not shown in the graphic but also notable, the main places of origin for commuters that travel for work in the NKADD region include Cincinnati, Florence, and Covington.

EMPLOYMENT LOCATIONS – DAILY COMMUTE TOTALS (TOP 5)

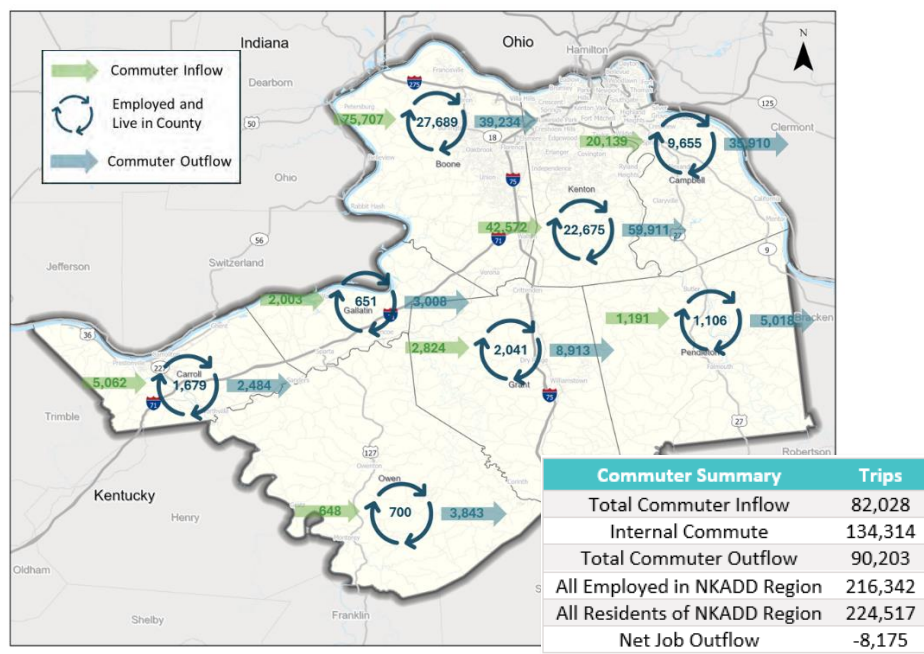


### 4 TRAVEL BEHAVIORS

To assess regional trends and patterns of commuters, an analysis was completed using the 2021 “On the Map” US Census Bureau. The map below illustrates the inflows and outflows of workers for each county. Boone County stands out as the county with the highest commuting flow,

with a significant influx of commuters coming in for work. This contrasts with rural counties who see a larger share of residents commuting out for employment. The table shows the total commuter inflow and outflow for the 8-county region. The number of commuter outflow exceeded the number of commuter inflow, leading to a net outflow of 8,175 commuters.

COMMUTER SUMMARY - 2021

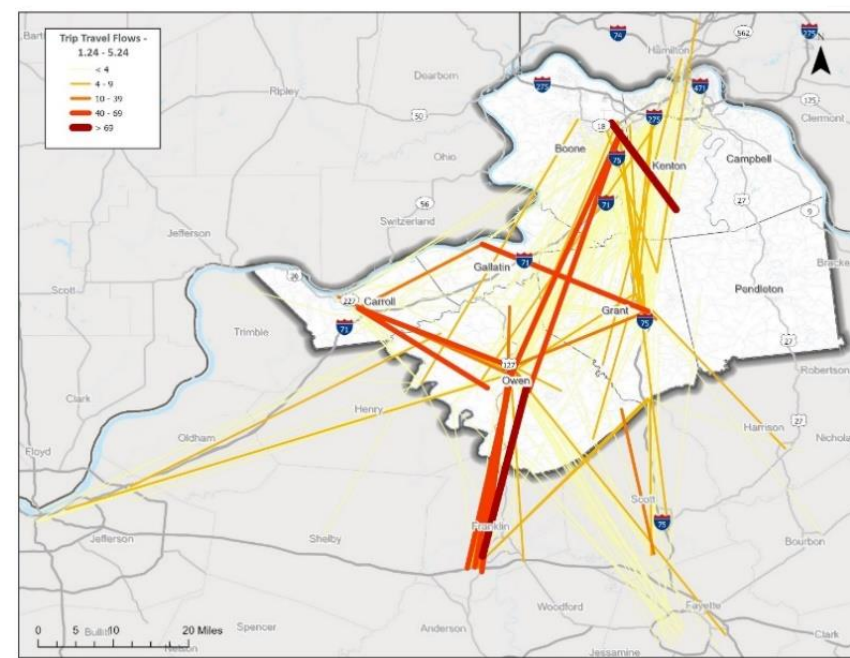


The travel flow analysis of trips supplied by transit providers in the region further identifies common travel patterns, helping to pinpoint areas where enhanced and coordinated transit services are most needed. Trip pairs were analyzed for BAWAC, OCPT, and TANK. For trips provided by BAWAC common trip pairs went to and from Fort Mitchell, Independence, Florence, and Alexandria. Some commonly traveled destinations include the

Easterseals Redwood disability support center in Fort Mitchell, the BAWAC facility, and New Perceptions, a community services center in Edgewood.

The following map illustrates the origin-destination pairs of trips for OCPT between January 1 and May 31, 2024. The most common origins and destinations for trips were from Owenton to Frankfort and Williamstown, rural Kenton County residences to shopping centers in Florence, Gallatin Nursing and Rehabilitation in Warsaw to the DaVita Williamstown Dialysis center, Elmer Davis Lake to the Carrollton Walmart, and trips to the Frankfort Regional Medical Center.

OWEN COUNTY PUBLIC TRANSIT TRIP PAIRS



## 5 COMMUNITY FEEDBACK

A series of public outreach activities were conducted to get community feedback on their travel habits, use of public transportation, and existing transportation gaps and challenges. An online survey and seven (7) in-person public workshops were completed. In-person community feedback revealed evident transportation needs across various areas in Northern Kentucky. Many noted the need for more and improved transportation options for connecting residents to key destinations like shopping centers and hospitals, especially for seniors and individuals with disabilities in rural areas.

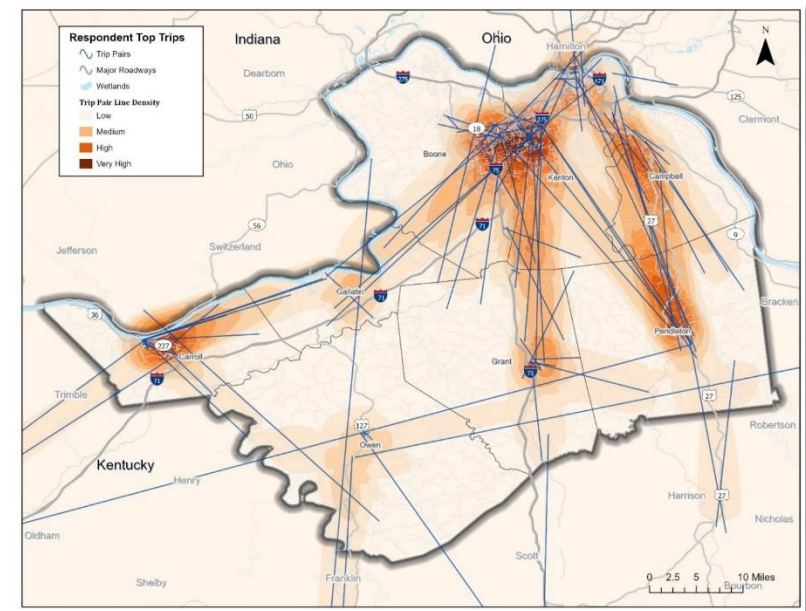
### PUBLIC WORKSHOPS



The online survey conducted from April to December 2024 revealed several important takeaways. A summary of some key results is presented below.

- Lack of public transportation options is a top challenge respondents face with their primary mode of transportation.
- Affordable fares, same day on-demand services, and competitive travel times are leading features that respondents noted for public transportation services.
- Safety and reliability were also noted as critical factors, with some mentioning the need for on-time services and better communication.
- Common trips, as shown below, include rural counties such as Carroll, Grant, and Pendleton to the Edgewood area in Kenton County, Florence in Boone County, or to the western side of Campbell County.

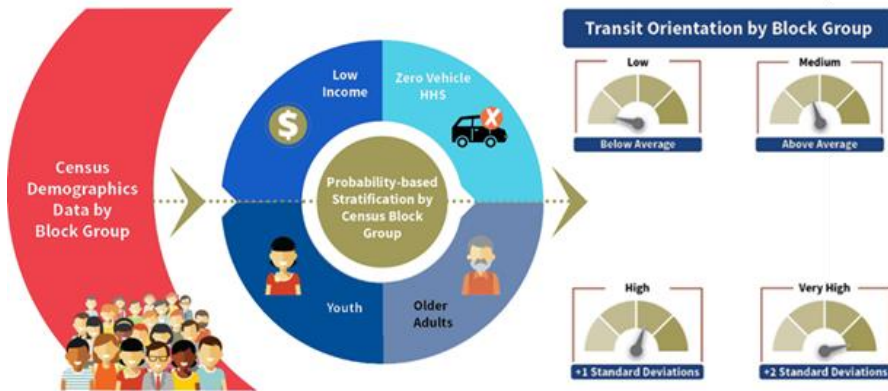
### SURVEY RESPONDENT HOME TO TOP DESTINATION TRIP PAIRS



## 6 MARKET ANALYSIS

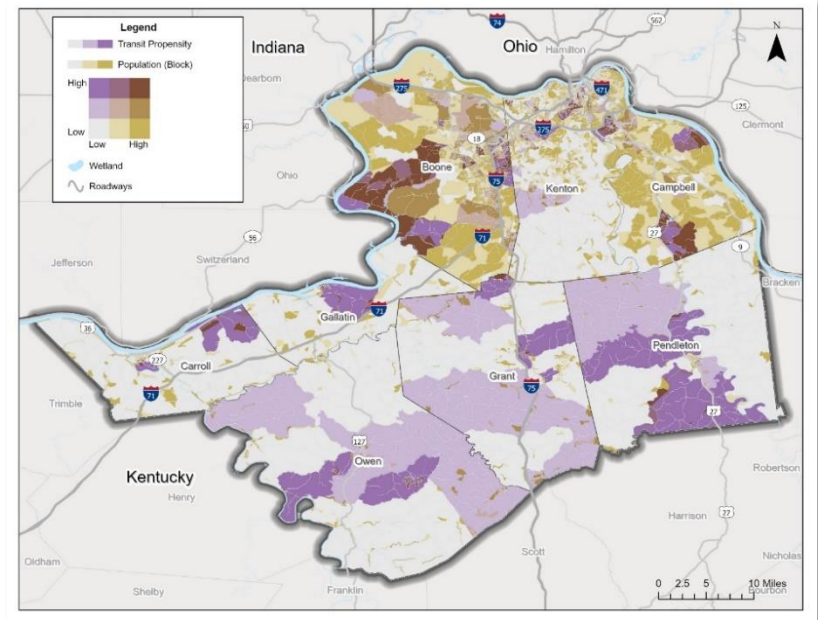
A market analysis was completed to identify the socioeconomic characteristics and travel demands within the NKADD region. Historically, traditional transit users typically have included older adults who may no longer drive, youth who are yet unable to drive, and households that are low-income and/or have zero vehicles available for transportation use.

To assess mobility needs and potential demand for mobility services, including transit, a Transit Orientation Index (TOI) assessment (also referred to as a transit propensity analysis) was conducted. The TOI assessment identifies areas within the region where traditional mobility needs exist. To complete the TOI analysis for the NKADD region, the four American Community Survey (ACS) data layers (low income, zero-vehicle households, youth, and older adult populations) were overlaid to develop a composite ranking for each census block group consisting of “Very High,” “High,” “Medium,” and “Low,” with respect to the level of transit orientation (mobility need condition) present.



A further examination of the transit demand in the NKADD region was conducted utilizing a bivariate analysis show areas with both a high transit propensity and a high density of population or households by block per the 2022 ACS 5-year estimates. Areas exhibiting the highest combination of transit propensity and population density by block are found in the urban northern and northwestern portion of the NKADD region. Western Boone County and Campbell County along Highway 27 show the greatest overall mobility need (transit propensity) as there are multiple blocks that display high population and transit propensity simultaneously. The more rural counties also exhibit block groups of high transit propensity, but due to their rural nature, have lower populations.

TRANSIT ORIENTATION INDEX AND POPULATION DENSITY



## 7 MOBILITY NEED BY THE NUMBERS

The relationship between transit supply and transit need is analyzed by comparing current transit availability for both the overall population (per capita) and a measure of mobility need using a mobility need index comprised of demographic groups statistically likely to depend on transit services. These groups include households living in poverty, zero-vehicle households, older adults (65+), and young adults (ages 15-24).

To understand how transit needs may shift in the next ten years, population projections from the Kentucky State Data Center were used to determine expected changes in population in 2030 and 2035. This information was used to estimate both future mobility need and future service supply required for each county in 2030 and 2035. The service supply required is based on the existing trip rate, passenger trips provided per capita and per the mobility need index population.

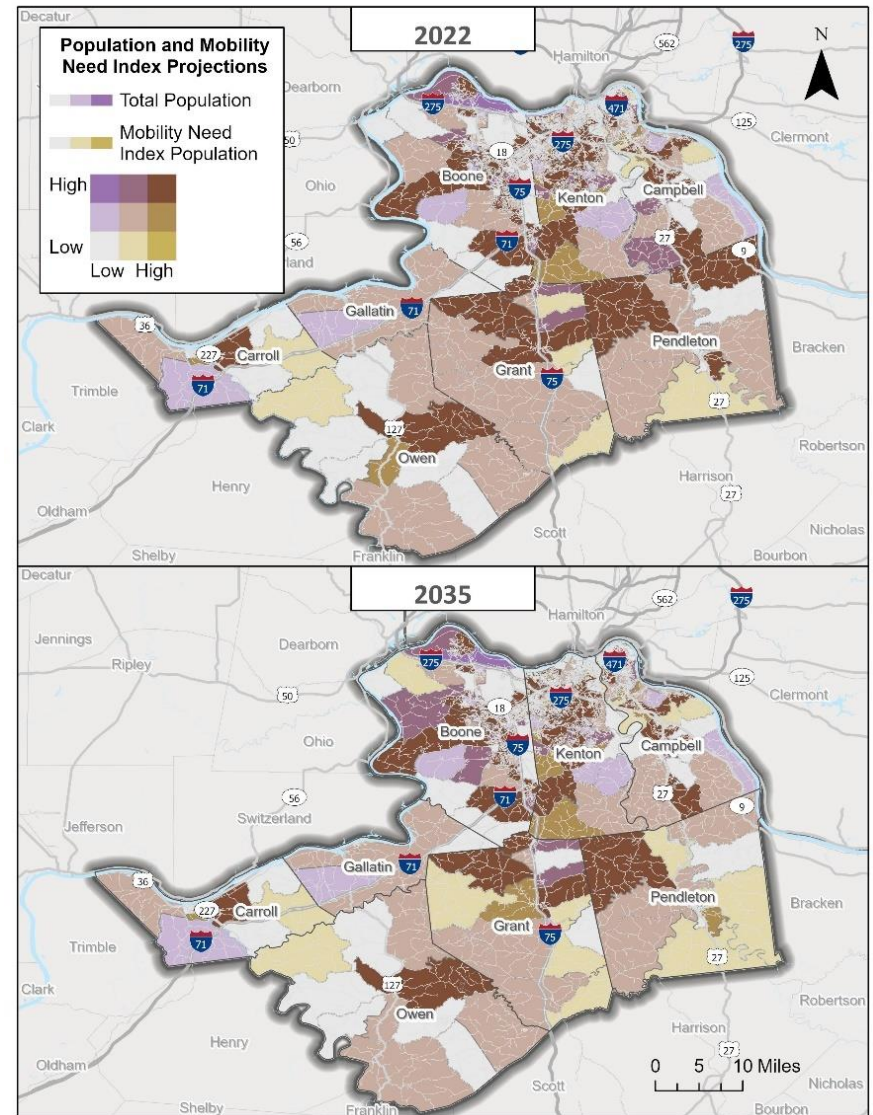
MOBILITY NEED INDEX POPULATION PROJECTIONS – 2022 TO 2035

	2022	2025	2030	2035	% Change (22 to 30)	% Change (30 to 35)
Boone	41,147	43,607	45,995	48,404	12%	18%
Campbell	35,357	35,821	36,063	36,018	2%	2%
Carroll	4,106	4,075	4,040	4,002	-2%	-3%
Gallatin	2,962	2,984	3,003	2,996	1%	1%
Grant	8,945	8,952	8,931	8,897	0%	-1%
Kenton	57,886	59,197	60,154	60,838	4%	5%
Owen	4,294	4,369	4,398	4,413	2%	3%
Pendleton	5,527	5,453	5,334	5,163	-3%	-7%
<b>Total</b>	<b>160,224</b>	<b>164,458</b>	<b>167,918</b>	<b>170,731</b>	<b>5%</b>	<b>7%</b>

The following map illustrates population growth estimates by block group, using a bivariate map to highlight areas with expected population growth and growth of populations of higher transit need within the NKADD region.

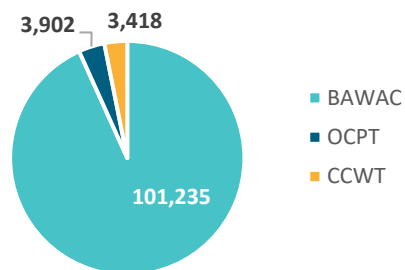


POPULATION CHANGES 2022 TO 2035



As shown below, BAWAC provides the most service of the rural providers by a significant margin. Both OCPT and CCWT offer similar service levels to each other, though CCWT operates exclusively within Carroll County.

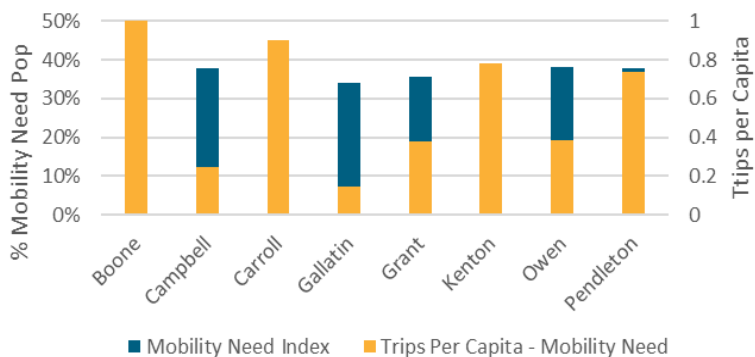
ANNUAL SERVICE SUPPLIED -BAWAC, OCPT, AND CCWT



The subsequent figure compares the proportion of mobility need index populations to transit service levels supplied by the rural transit providers (measured by trips per capita) across counties.

**Campbell, Gallatin, Grant, and Owen Counties have the lowest transit service relative to mobility need populations.**

PERCENT MOBILITY NEED POPULATIONS VS. SERVICE SUPPLY



## 8 RECOMMENDATIONS

The recommended strategies to improve coordination among existing transit agencies and expand mobility option across the NKADD region focuses on individuals who currently have limited or no transportation options. These recommendations are based on the research and analysis from the preceding sections, with an emphasis on addressing identified gaps in transit service.

### Regionally Integrated Technology Platform



A system that enables agencies to coordinate and broker trips, share data, facilitate ride requests, and streamline regional transportation services.

### Improving Access to Mobility Services



Expanding the current NEMT provider services to include general public transit, the introduction of new providers and services, and the increase of mobility services levels.

### Explore Joining NEORide



Consider joining NEORide to access collaborative funding opportunities and improve regional coordination.

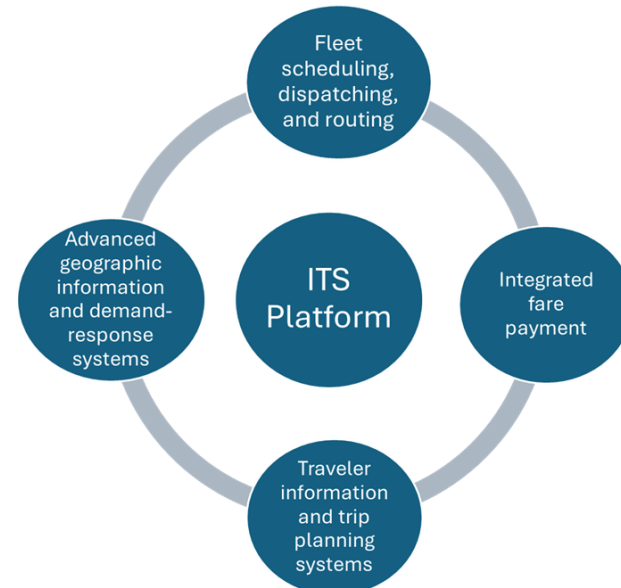
## 8.1 Regionally Integrated Technology Platform – Brokerage Model

One significant challenge in coordinating regional transportation lies in the complexity of managing services and funding from over 80 Federal programs designed to support transportation for disadvantaged populations. These human and social service programs are often siloed, restricting transportation to specific eligible groups for particular purposes.

Essentially, the inability to coordinate transportation services across need-based programs creates duplication of services, reduces service efficiency, and pushes operating costs higher. By coordinating transportation services across program services and creating a non-program (general public) service type, the number of persons able to access services would increase, service operations would become more efficient, and costs on a per trip basis would drop.

One promising solution proposed by the Department of Transportation is the use of Intelligent Transportation Systems (ITS). ITS leverages technology to connect customers, agencies, and transportation providers through a single point of access, streamlining operations and improving service delivery. By fostering better communication and coordination, ITS can help break down silos and ensure more efficient use of resources, ultimately enhancing mobility for all users.

One example of ITS is a one call/one click transportation information and scheduling software which connects multiple agencies together with a simplified or single point of access. This provides an integrated structure utilizing ITS to perform the following functions and benefits, according to the Federal Transit Administration.



This type of account-based platform integrates service offerings, making it easier for riders to plan and request trips and for providers to coordinate operations. This system would support user accounts and profiles, allowing individuals or agencies to manage trips, track usage, and receive detailed billing. Automated billing would be directed to the appropriate entity, whether it be individual users, Medicaid, or senior programs. Key functionalities would include real-time trip scheduling, route optimization, and secure payment processing from various sources, including subsidies or user fees.

## 8.2 Improving Access to Mobility Services

Counties that rely solely on NEMT services often face significant mobility challenges for those that have mobility needs for non-medical trips. Residents in these areas lack access to basic transportation for shopping,

employment, and social activities, which exacerbates isolation and limits opportunities. Two solutions to this are expanding the current NEMT provider services to include general public transit, the introduction of new providers and services, and the increase of mobility services levels.

#### 8.2.1 Leveraging NEMT Transit Services

While leveraging NEMT transit services is a great idea for increasing access to transit, it is important to point out that agencies providing NEMT face several barriers including operational, regulatory, and financial complications. Implementing a brokerage model could be a viable solution to this issue as it would provide agencies with the flexibility to integrate personalized fares. By adopting the brokerage model and software, agencies could streamline billing processes, automatically directing charges to the correct funding source, whether Medicaid, local programs, or user-paid fares.

#### 8.2.2 Introduction and Expansion of Transit Services

Another method that may be used to ensure that non-medical transportation needs are met is through the recruitment and contracting of new providers. These providers may supply on-demand transit services, which provide flexible, demand-responsive transportation that caters to local trips and can connect riders to fixed-route transit systems where available. Potential areas that may benefit from the introduction of transit services include Campbell, Gallatin, and Grant Counties, as these counties had the lowest trips per capita served, as outlined in Section 6 (Mobility Need Forecast).

To enhance transit options for residents in rural counties, NKADD may explore the expansion of TANK services to include intercity bus service, operating a few days a week along the three major north-south corridors:

I-71, Highway-25, and Highway-27. This service would address the needs of residents who can access central locations in their towns but require



transit to key activity centers in neighboring towns or urban areas. Partnering with TANK for service operations may be a viable option, as they have the software, staffing, and capability to operate regional intercity services to connect key areas within the eight-county region.

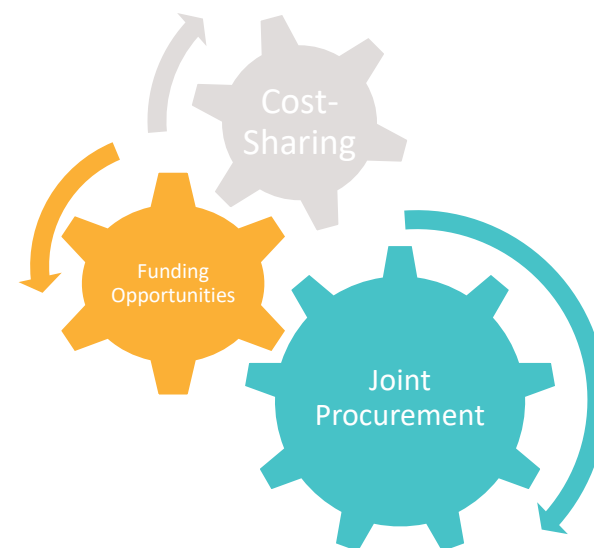
Additionally, as noted in the previous section, the amount of service provided is significantly less than the mobility needs of the population within the NKADD region. The trip rates largely reflect travel being taken by people eligible for Medicaid. This does not reflect the totality of the share of the population that may be low-income, disabled, cannot drive, and are not eligible for any program-based services. It is therefore reasonable to believe that there is a high and urgent need to increase mobility services and service levels to meet the needs of those people without ready access to mobility.

### 8.3 Explore Joining NEORide

Through joint procurement efforts, NEORide facilitates the acquisition of essential transit resources, including vehicles, technology systems, and operational tools, at competitive prices. Transit agencies and other organizations that belong to NEORide gain access to funding and opportunities for broader cost-sharing on capital, technology, service providers by leveraging the combined buying power of its members to negotiate contracts. This model supports smaller agencies that may face challenges in securing advantageous deals independently.

Either through NKADD joining NEORide or helping the local serviced providers join NEORide, there is potential to leverage its collective purchasing power and funding opportunities. Membership in NEORide could support efforts to expand existing transit operations and potentially introduce new services. This collaboration could also help agencies

broaden transit options for the general public and underserved groups, improving regional mobility and access.



## 9 IMPLEMENTATION PLAN

The proposed steps and timing for implementing the recommended NKADD region transit service changes, enhancements, and additions detailed previously are presented in the implementation plan in Figure XX.

The five-year implementation plan, includes logical steps to implement the recommended strategies, including foundational steps and early coordination, implementation of the regionally integrated technology platform, NEORide integration, and service expansions, marketing and outreach, and monitoring and evaluation. The preliminary phase of research, coordination, and goal setting is critical for initiating procurement and, ultimately, piloting the recommended changes.

FIGURE 1: FIVE YEAR IMPLEMENTATION PLAN

