

2015 Comparative Data Report on State Transportation Programs

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Sources

- FHWA “*Highway Statistics, 2013*”
- Email Survey of State DOTs
- *Better Roads Magazine*
- Federal Transit Administration

Report Highlights

- Legislation
- Quick Facts / Budget Information
- Demographics and Road Mileage
- Highway Finance
- Fuel Taxes
- Public Transit
- Bridges
- Fatalities
- Administration

Recent Legislation

- State Infrastructure Banks (AL, WV)
- Ballot Initiatives (LA, TX)
- Gas Tax Increases or Stabilizations (GA, KY, NC)
- Motor Carrier Operations (AR, KY, GA, MO, OK, TN)
- Traffic Code:
 - Booster Seats Requirement Expansion (KY)
 - Seat Belt Fine Increase (TN)
 - Open Container Law (WV)

Quick Facts Example KY

Population (2014)	4,413,457
Land Area (Square Miles)	39,732
Vehicle Miles Traveled (Billions)	47.0
Licensed Drivers	3,019,283
Motor Vehicle Registrations	4,031,748
State Highway Miles	27,620
Total Highway Lane Miles	78,646
Gasoline Tax (Cents per Gallon) (July 2015)	26.0
Per Capita State Receipts from the Federal Highway Trust Fund	\$172
Fatalities per 100 Million Miles of Vehicle Travel	1.36

Budget Information Example KY

Budget Area	Amount (Million \$)	Percent
General Administration and Support	73	3.8%
Aviation	14	0.7%
Debt Service (GARVEE Bonds)	68	3.6%
Debt Service (other state-issued bonds)	154	8.1%
Public Transportation	32	1.7%
Revenue Sharing	397	20.8%
Vehicle Regulation	44	2.3%
Capital Projects	15	0.8%
Highway Construction (includes resurfacing projects)	774	40.6%
Highway Maintenance (includes snow/ice removal, tree trimming, potholes, signage, bridge maintenance, traffic signals, roadway lighting, guardrail, and rest areas)	335	17.6%
TOTAL	1,906	100.0%

Demographics and Road Mileage

- SLC States:
 - 37.1% of the nation's population,
 - 36.9% of the nation's licensed drivers,
 - 36.6% of the nation's young licensed drivers (19 and under),
 - 37.2% of the nation's registered motor vehicles,
 - 40.9% of the nation's vehicle miles traveled,
 - 40% of the nation's highway miles.

Demographics and Road Mileage

- Registered vehicles per licensed driver :
 - SLC - 1.22 U.S. - 1.21

- Miles driven annually per licensed driver :
 - SLC - 15,581 U.S. - 14,085

- Trends 2012-2013:
 - VMT : SLC - Up 1% U.S. - Up 0.7%
 - Vehicle Registrations: SLC - Flat U.S. - Up <1%
 - Young Drivers: SLC - Down 5.7% U.S. - Up 1.7%

Survey Question:

Transportation Network Companies

- Transportation Network Companies (TNCs) connecting transportation providers and riders through mobile app (Uber, Lyft)
- TNCs operate in 13 of 15 SLC states (AL, WV)
- State Regulatory Ability:
 - 7 States have passed state law governing TNC operation (AR, GA, KY, OK, SC, TN, VA)
 - 6 States have no state TNC law, relay on local regulation (AL, FL, MS, NC, TX, WV)
 - 2 States have existing authority over vehicles for hire (LA, MO)

Highway Finance

- Per capita federal highway spending in the SLC states:
 - High \$233 (WV) Low \$95 (FL).
- FY 2013 Federal Apportionment/Payment ratio:
 - At least 1.00 for 14 of the 15 SLC states (TX)
 - High 2.01 (WV) Low 0.95 (TX)
 - SLC region - 1.14 U.S. - 1.25
- 3 Historical Donor States: NC, SC, TX

Survey Question:

Extraordinary Revenue Measures

- GA – Transportation Funding Act of 2015 (\$990M annually):
 - 26 cpg Gas Tax / 29 cpg Diesel, indexed for fuel efficiency
 - Heavy Vehicle Annual Impact Fees (\$100-\$200)
 - \$5/night Hotel Motel Tax
 - Annual Fees on Alternative Fueled Vehicles (\$200-\$300)
 - Allows LOST of up to 1% for up to 5 years for projects
 - Keeps local sales and use tax on motor fuels
- TX voters passed constitutional amendment to transfer 1/2 of new oil and gas severance tax revenues to the State Highway Fund for non-toll highway improvements (estimated at \$1.4B for FY 15)

Survey Question: Extraordinary Revenue Measures

- 3 states issued bonds:
 - GA - \$100M Bridges; \$75M Transit;
 - MS - \$162M Bridges;
 - NC - \$225M GARVEEs
- 2 states (LA, TX) have constitutional amendments regarding transportation funding on the November ballot:
 - LA: Funding source for state infrastructure bank
 - TX: Transfer excess sales and vehicle sales taxes to State Highway Fund

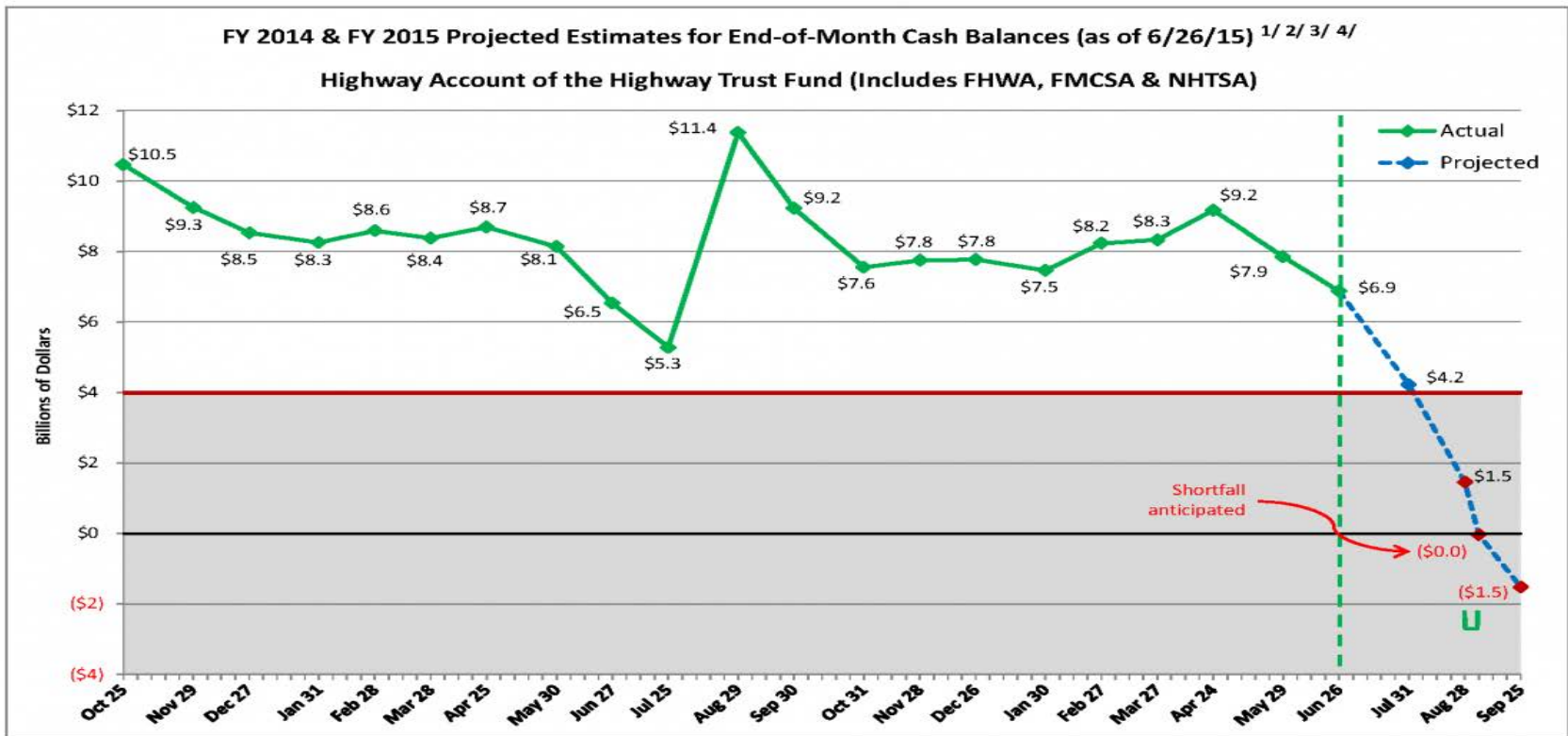
Uncertainty of FHTF Revenues (SLIDE FROM JULY 2014)

- Long term future of the FHTF is uncertain
- Federal gas tax of 18.4 cpg unchanged since 1993, lost 38% of its purchasing power by 2013
- VMT flat or declining, increased fuel efficiency
- FHTF received GF transfers of almost \$55 billion since 2008
- FHTF projected negative balance starting in August 2014
- Federal Funds – Reimbursement basis to states
- July, 2014 -- Congressional action stabilized funding through May 2015

Uncertainty of FHTR Revenues

- IT IS NOT GETTING ANY BETTER
- July 31 Deadline Looms
- Short Term Fix Probable
- Developing a Reliable and Innovative Vision for the Economy (DRIVE) Act
 - Passed Senate Environment and Public Works Committee
 - 6 year, \$277 B Federal Transportation Reauthorization
 - Contains no funding
 - Senate Finance - VMT?? Not addressing solvency issues

Uncertainty of FHTF Revenues



1/ Graph reflects actual data through 6/26/15 and end-of-month projections for the remainder of FY 2015.

2/ Total receipt and outlay projections are based on FY 2016 President's Budget Baseline assumptions. Projected monthly receipt and outlay rates are based on historic averages.

3/ Range of anticipated shortfall: Green brackets denote the estimated window of when the anticipated shortfall will occur.

4/ The shaded area represents when the Highway Account balance drops below \$4 billion, at which point cash management procedures may become necessary.

Source: FHWA

Survey Question: Delayed Projects?

- 3 States delayed project lettings (AR, GA, TN)
- Fewer planned projects, more conservative long range plans (LA, MS, MO)

Fuel Taxes

- SLC states collected almost \$14.5 billion in motor fuel taxes in 2013
 - 36.6% of the total fuel tax revenue of all the states.
- In 2013, SLC states accounted for 70.2 billion gallons of fuel use
 - 41.4% of the nation's total.
- From 2012 to 2013:
 - 8 of the 15 SLC states saw an increase in the amount of motor fuel tax receipts.
 - Overall fuel tax receipts: SLC up 0.9% U.S. up 0.2%

Bridges

- Substandard Bridges fall into 2 categories:
 - Structurally Deficient
 - Functionally Obsolete.
- Substandard State-Maintained Bridges:
 - SLC -18.5% U.S. - 18.4%
 - SLC down 0.4% U.S. Down 1%
- Substandard Local Bridges:
 - SLC - 25.1% U.S. – 22.4%
 - SLC down 0.3% U.S. Down 1.2%

Bridges (Continued)

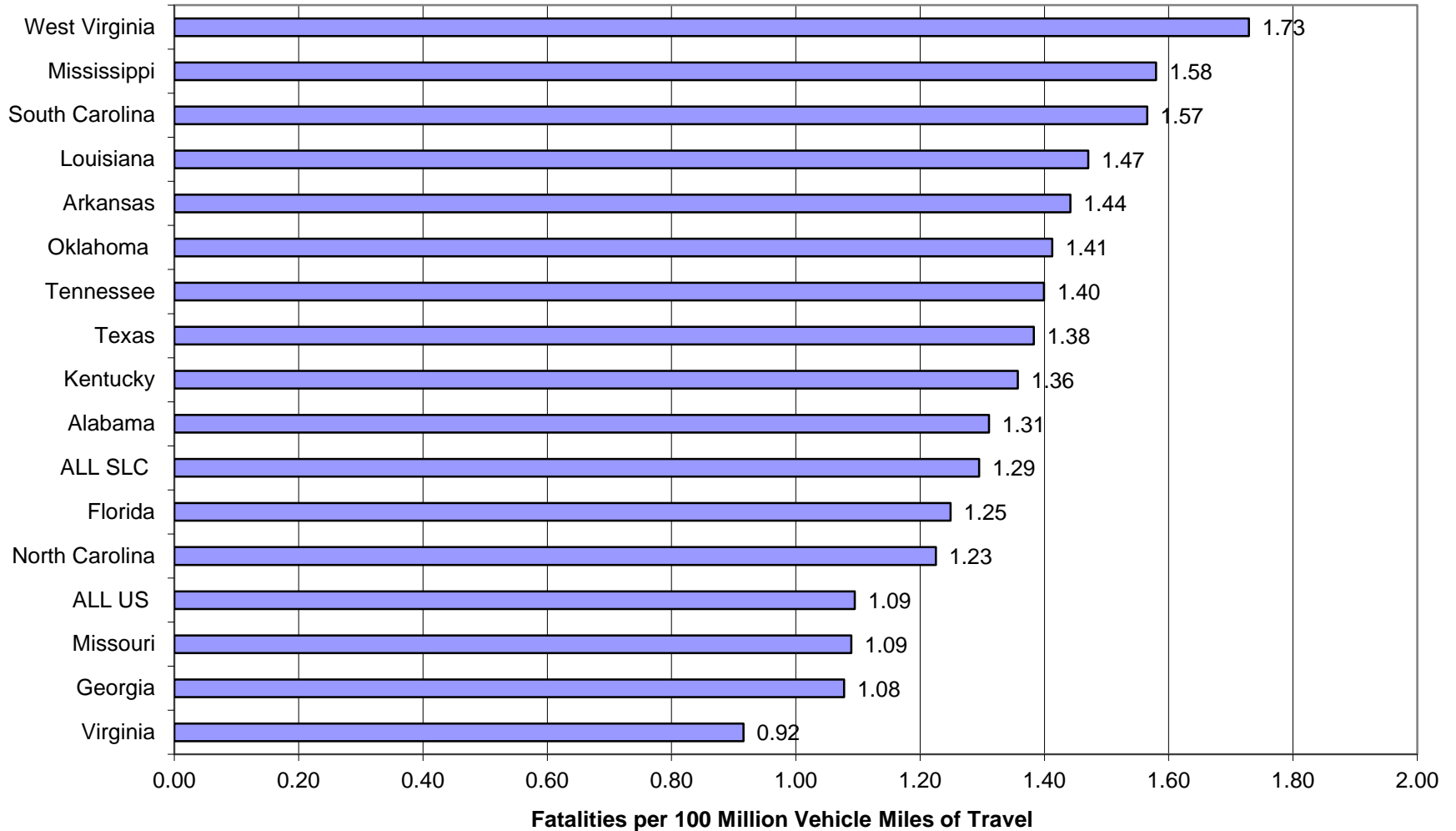
- Fracture Critical Bridges
 - Does not contain redundant supporting elements
 - If key supports fail, the bridge would be in danger of collapse
 - Does not mean the bridge is inherently unsafe, only that there is a lack of redundancy in its design
- Rate: SLC - 2.0% U.S. - 3.1%
 - No Change from 2013

Fatality Rates

- Motor vehicle accident fatality rates – Fatalities per 100 million miles driven
 - SLC -1.29 U.S. – 1.09
- 3 SLC states lower than or equal to the national rate:
 - VA - 0.92 GA - 1.08 MO – 1.09
- Highest rates:
 - WV - 1.73 MS -1.58 SC – 1.57
- Rates for SLC and US dropped in 2013 after increasing for first time in several years in 2012
- Rates on rural highways >2X rates on urban roads

Fatality Rates

Fatality Rates 2013



Fatality Rates

Fatality Rates by Road Type 2013 (Fatalities per 100 Million Miles of Travel)

State	Total Rate	Rural Highways and Streets		Urban Highways and Streets	
		Interstates	Total	Interstates	Total
Alabama	1.31	0.83	1.85	0.62	0.82
Arkansas	1.44	0.99	2.22	0.49	0.72
Florida	1.25	1.70	2.79	0.44	0.91
Georgia	1.08	1.08	2.17	0.50	0.74
Kentucky	1.36	0.63	1.82	0.45	0.73
Louisiana	1.47	0.82	1.72	0.84	1.29
Mississippi	1.58	1.96	2.34	0.05	0.56
Missouri	1.09	0.40	1.61	0.48	0.73
North Carolina	1.23	0.66	2.12	0.24	0.66
Oklahoma	1.41	1.09	2.18	0.59	0.84
South Carolina	1.57	0.46	2.45	0.45	0.59
Tennessee	1.40	0.82	1.90	0.73	1.08
Texas	1.38	1.20	2.19	0.81	1.02
Virginia	0.92	0.57	1.57	0.35	0.51
West Virginia	1.73	0.85	1.87	0.41	0.73
USTotals	1.09	0.83	1.85	0.36	0.78

Questions?

For more information, contact:

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