Fulton County

Senior Transportation Services Assessment

273,876

Completed rides in 2025

$10.17M

Combined net County cost

Dec 31, 2026

Both contracts expire

August 2026

SECTION 1

Executive Summary

Demand response program is stable but exposed to an aging fleet and ride cancellations

Strong on-time performance, yet late cancellations doubled and 60 of 64 vehicles are past useful life.

The TNC rideshare program is cost-competitive, but does not have all the performance data, and medical trips are expanding

At $24.22 per ride, but it now skews medical and reports no performance data.

Costs are set to rise faster than ridership

Without rate caps and reporting, combined cost could reach $14.1M by 2030.

2026 is the leverage point

The contract reprocurements are the County's main chance to fix cost, oversight, and service design.

2025 AT A GLANCE

273,876

Combined completed rides

$10.17M

Combined net County cost

$48.82 / $24.22

Cost per ride: Demand response / TNC rideshare

143,950 / 129,926

Demand response rides / TNC rideshare rides

Two Programs, Two Distinct Transportation Options

Demand Response

Transdev | paratransit bus

- Scheduled, door-to-door service for seniors 60+, adult day health, and training centers
- Operates Monday to Saturday, with dialysis the only Saturday service
- The only service able to carry wheelchair users: 6,600 accessible rides in 2025
- Higher cost and below-target productivity (1.75 of 3.0 trips per revenue hour)

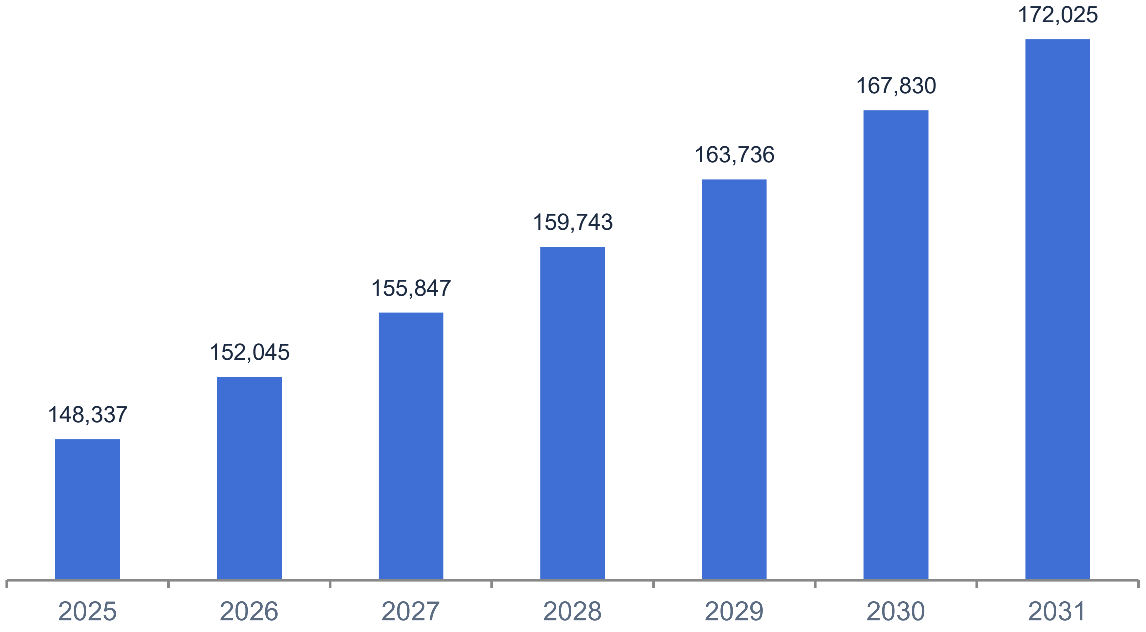
TNC Rideshare

Common Courtesy | Uber & Lyft

- On-demand Uber and Lyft for enrolled, ambulatory seniors 60+
- Capped at 8 standard plus 2 medical one-way rides per month; 11,180 enrolled
- Cost-competitive, but standard vehicles cannot accommodate wheelchairs
- No on-time, safety, complaint, or call-center data submitted in 37 months

Demand Is Growing, and Aging Faster

Fulton County population age 65 and older, 2025 to 2031



Planning projection at 2.5% annual growth from the 2025 Census base estimate.

+16% senior population by 2031

The 65+ cohort is projected to add about 23,700 residents, roughly 2.5% per year.

10% to 20% more rides in both programs

Demand response rising toward 160,000 to 175,000 trips; TNC rideshare toward 145,000 to 160,000.

The oldest cohort grows fastest

More demand for wheelchair-accessible, door-to-door, and recurring medical trips, which fall to demand response.

Long-run pressure is regional

ARC projects Tier 1 county senior-transportation demand will grow 40% to 60% by 2050.

What Seniors and Staff Value

Calyptus interviews at six senior centers and a Fulton County survey of 45 residents age 60 and older surfaced clear strengths. Seniors want the program strengthened, not replaced.

Value the service

Participants expressed appreciation for Fulton County's transportation services and want the program to continue improving.

Transportation supports independence

Seniors described transportation as essential for staying active, independent, and connected to daily life.

Access to senior centers matters

Rides to senior centers help seniors participate in programs, maintain friendships, and avoid isolation.

Medical trips are highly valued

Participants recognized the importance of having transportation available for healthcare appointments, especially when mobility assistance is needed.

The service is meeting basic needs for many riders

The local resident survey found 37 of 45 respondents (82%) reported neutral-to-positive satisfaction with transportation services.

Riders want improvement, not replacement

The feedback shows seniors want better reliability, communication, and scheduling, but they still see the service as important and worth strengthening.

Where Seniors Want Improvement

Findings draw on Calyptus interviews at six senior centers and a Fulton County survey of 45 residents age 60 and older. Themes are treated as informative preliminary evidence.

Reliability is the top concern

Late buses, missed pickups, and incorrect cancellations are consistent across North, Central, and South Fulton.

Communication gaps

Call wait times of 30 to 40 minutes and little proactive notice when a bus runs late.

Scheduling flexibility

Advance-reservation rules and limited same-day options are leading survey barriers.

Quality of life at stake

Seniors describe transportation as critical to independence; gaps lead to isolation and missed activities.

Service hours and days

Demand for weekend service and early-morning and evening coverage outside current hours.

Awareness and ease of use

Few seniors use the app-based TNC option; trip limits and cost are barriers.

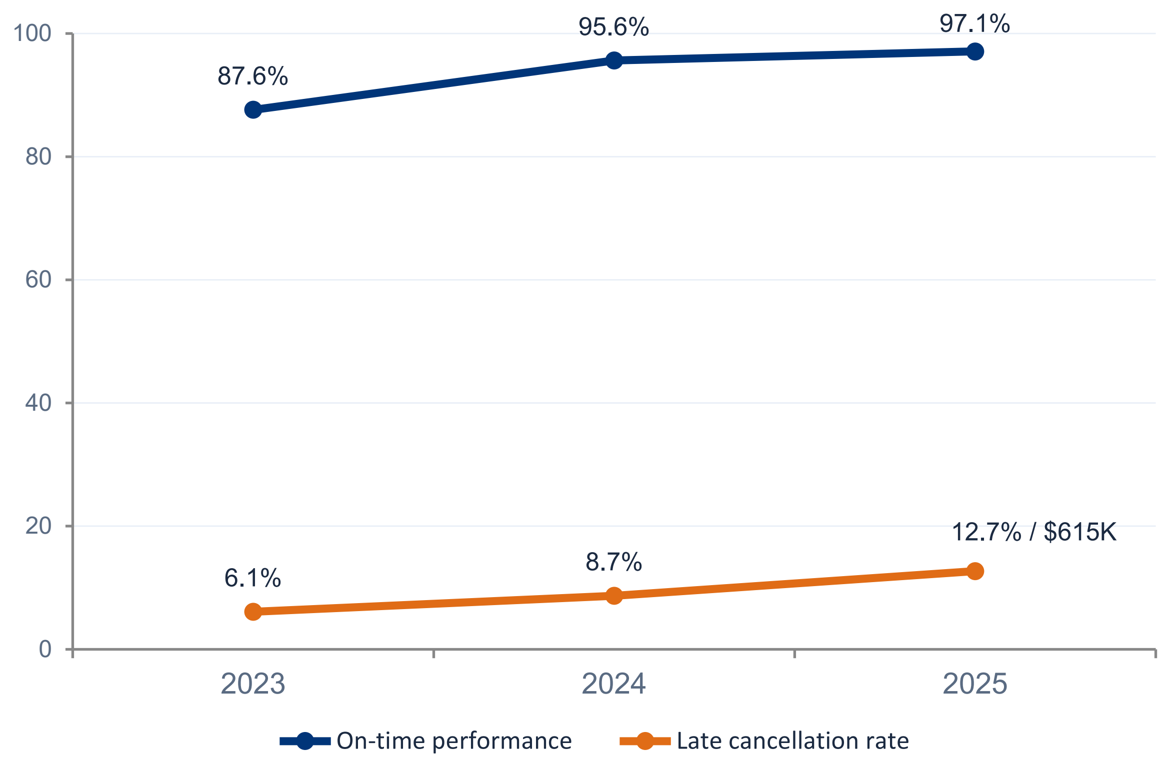
Combined Program at a Glance, 2025:

What we measured	Demand Response (Bus)	TNC (Rideshare – Uber/Lyft)	Combined
Total rides completed	143,950	129,926	**273,876**
Net cost to County	$7,027,710	$3,146,240	**$10,173,950**
Cost per completed ride	$48.82	$24.22	n/a
On-time performance	97.1%	Not reported	n/a
Late cancellation rate	**12.7%**	Not applicable	n/a
Missed trips (provider fault)	Zero reported	Not applicable	n/a
Medical ride share	Not separately tracked	56.2%	**Rising**
Wheelchair-accessible service	6,600 rides	None (ambulatory only)	n/a

**** Late cancellations have systemic, financial, and community impacts.***

Demand Response: Reliability Up, Cancellations Up

On-time performance vs. late cancellation rate, 2023 to 2025



Source: Transdev Monthly OPS Reports.

On-time performance improved to 97.1%

Up 9.5 points over three years and above the 90% contract standard, even as trip volume rose 15.4%.

Late cancellations more than doubled

Above the 8% benchmark for 19 consecutive months. Late cancellations amount to approximately **$615,000** annually in variable operational resources.

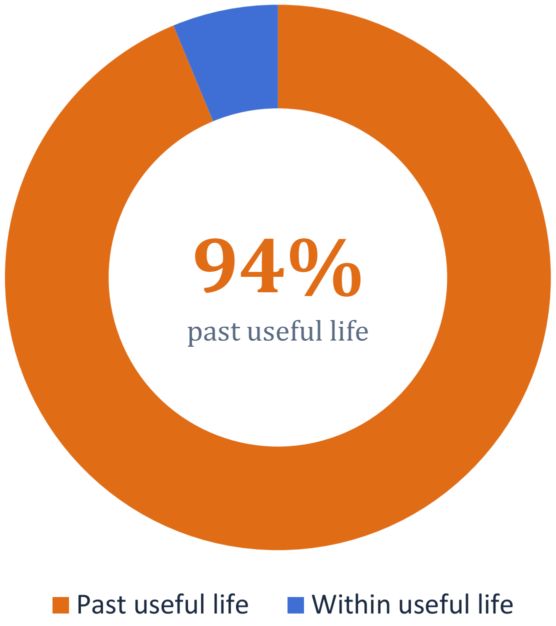
DSS will develop an awareness campaign to help seniors understand the impact of these cancellations.

Productivity sits at 1.75 of the 3.0 target

Every dispatched vehicle that returns empty after a same-day or door cancellation pulls the average down.

An Aging Fleet with Growing Demand Response

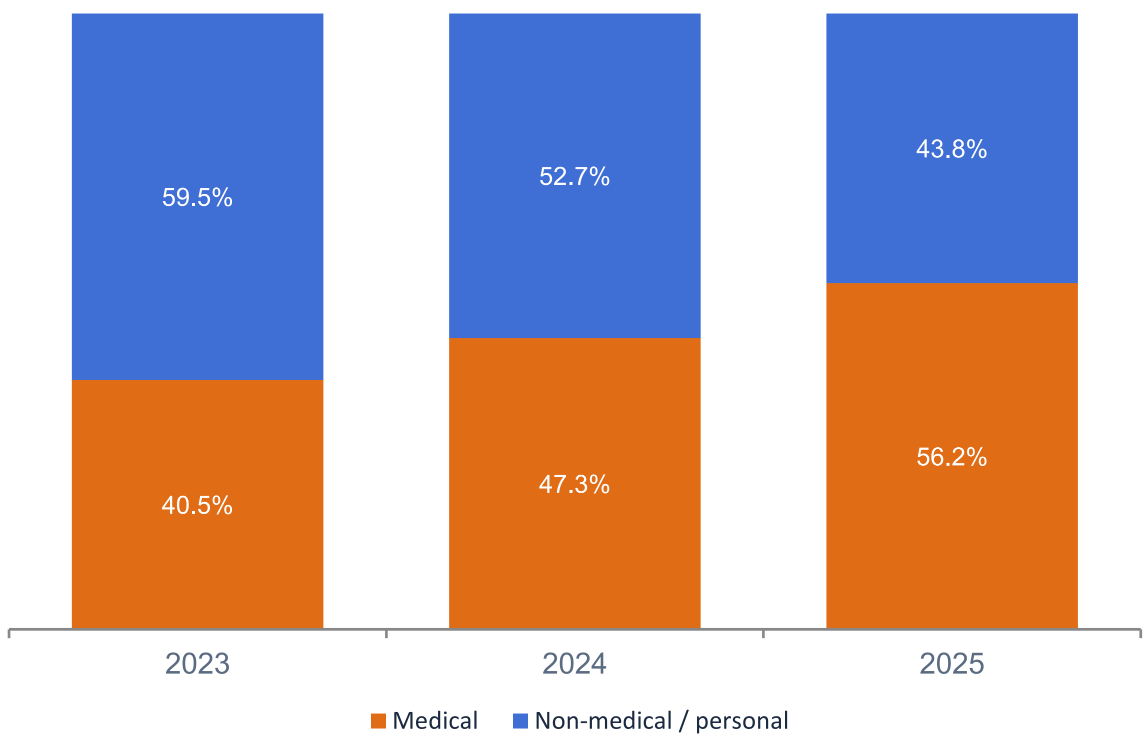
Fleet condition, 64 vehicles



60 of 64	Vehicles have exceeded the useful-life standard
+15%	Projected demand response population growth at our NSC's and DBHDD Training Centers through 2029.
+20%	Projected medical demand response population growth through 2029.
$8.5M	Estimate replacement cost of aging fleet.

TNC: Cost-Competitive, More Rides Booked for Medical

TNC ride share, medical vs. non-medical, 2023 to 2025



Source: Common Courtesy Cover Sheets (verified). Non-medical rides fell 36.4% from 2023 to 2025.

$24.22 per ride

Cost-competitive with peer subsidized TNC programs and well below the demand-response rate.

Medical rides reached 56.2%

Up from 40.5% in 2023. Medical rides incur higher cost than personal rides due to their higher mileage allowance.

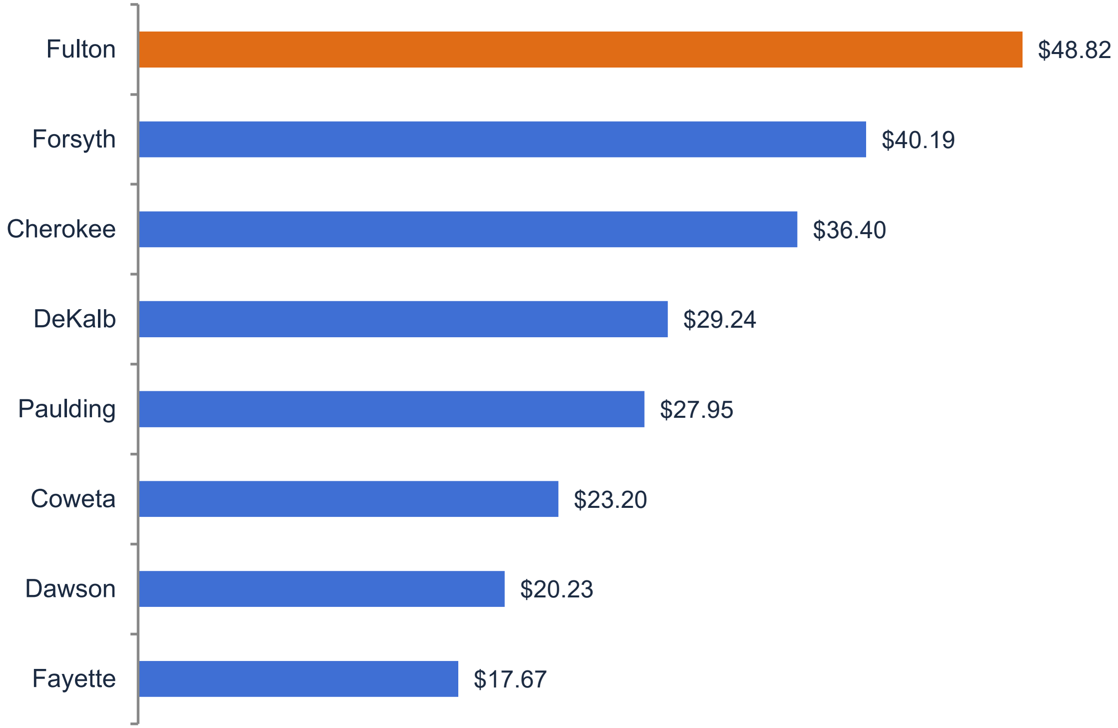
No performance data

On-time, safety, complaint, and call-center data were not submitted in 37 months.

BENCHMARKING

How Fulton Compares to Its Peers

Demand-response cost per completed trip, Georgia peers



Source: FTA NTD 2024 and published Georgia program data. Fulton highlighted in red.

DR cost is high but in context

Fulton's $48.82 sits above smaller peers, but it carries greater scale, density, and accessible-service responsibility. DeKalb ($29.24) is the closest Tier 1 peer.

TNC is cost-competitive

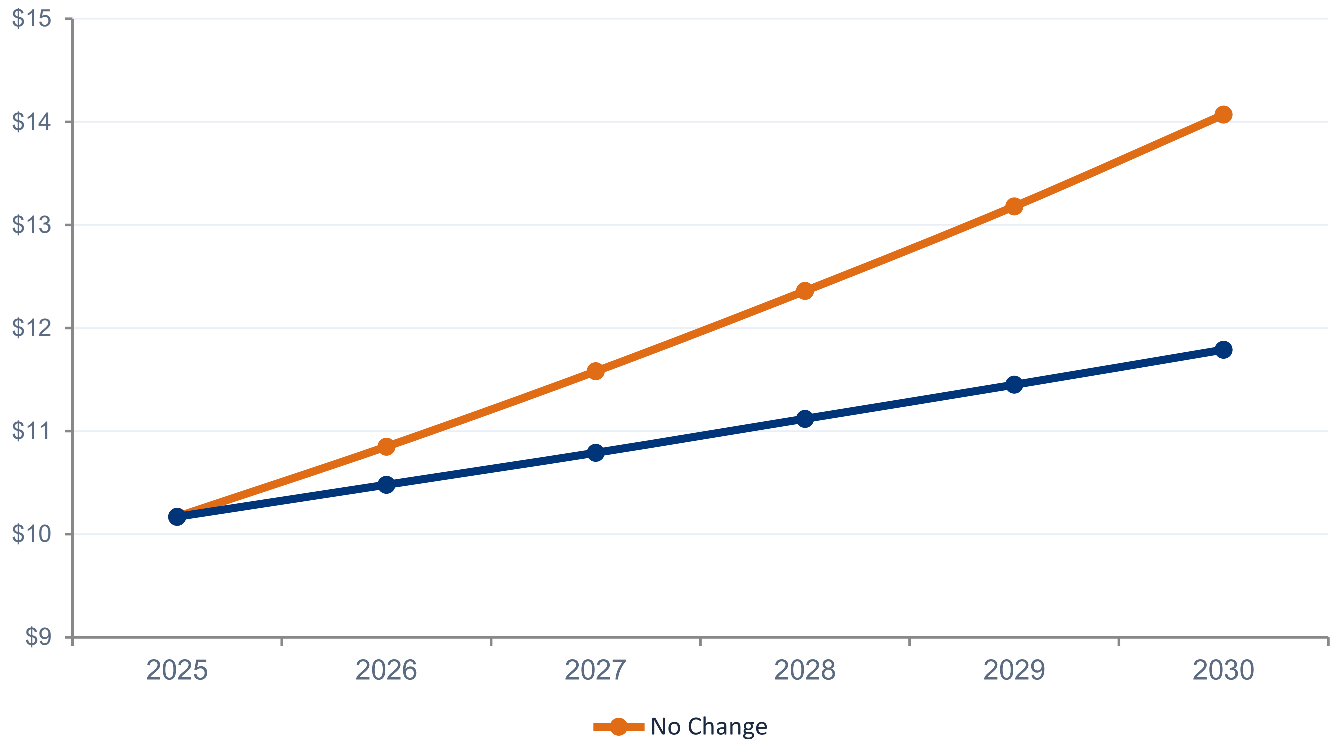
At $24.22 per ride, Common Courtesy is within the managed subsidized TNC range. The constraint is its conservative 8+2 monthly trip cap, low versus peers.

Reporting is the market-wide gap

Georgia peers rarely publish on-time or cancellation data, so Fulton's metrics are judged against contract and industry guidance.

Five-Year Cost: Various Scenarios

Projected combined program cost, 2025 to 2030 ($M)



$2.27M

annual gap by 2030

The financial difference between the Recommended Program and No Change paths

Current Program: No Change $14M

7% Transdev / 6% TNC growth, no new controls

Consultant-Recommended Program $11.8M

About 3% growth with caps, reporting, and policy controls

Future Service Options for Consideration

The County has clear levers to manage cost and protect access.

No Change, Current Program $14.1M

TNC mileage cap policy

Current mileage policy continues with no new cost or performance controls.

Demand response key cost driver

Late cancellations and productivity remain key cost drivers without stronger controls.

Consultant Recommended Policy & Program $11.8M

Hold 15-mile cap + trip assignment

Hold the medical cap at 15 miles with monitoring. Route ambulatory short trips to TNC and accessible or longer medical trips to demand response.

Co-pay and free fare

Keep the $1 co-pay, adjust it, or test free fare. Removing it is roughly cost-neutral only if ridership holds and the $1 dispatch fee is reduced.

Department Recommended Program Actions

Reduce late cancellations

8% performance reference; ~$615K of 2025 operating resources affected.

Leverage new RFPs

New performance metrics and cost controls; anticipate demand by trip type and growth.

Fleet replacement plan

Require a plan before award; price ownership, leasing, maintenance, and capital through the RFP.

Scenario cost figures reflect five-year growth assumptions. Service options shown are policy and procurement levers and are not additive to the scenario totals.

SUMMARY

Implications for Future Considerations

Demand Response

Paratransit bus

TNC Rideshare

Uber & Lyft

- Both programs are solvent through December 31, 2026; contract extensions thru 2027.
- Programs will anticipate future demand by trip type and growth.
- New performance metrics and cost controls will be incorporated into new solicitations.
- Demand response solicitation will require a fleet replacement plan before award.