



Finance and Capital Committee

Information Item III-A

June 27, 2024

Regional Opportunity and Partnership Annual Report

Washington Metropolitan Area Transit Authority

Board Action/Information Summary

☐ Action ☒ Information

Document Number:
206789

Resolution:
☐ Yes ☒ No

Presentation Name:

FY2024 Regional Opportunity and Partnership Annual Report

Project Manager:

Jordan Holt

Project Department:

Performance, Data and Research

Purpose/Key Highlights:

Update the Board of Metro's FY2024 performance on metrics aligned to Goal 3: Regional Opportunity and Partnership in Metro's Strategic Transformation Plan, including key actions and initiatives underway to drive progress.

Metro made positive progress on all metrics.

- Ridership continues to grow: Metro carried 22 million customers in May, 12 percent more than May 2023, and is meeting the FY2024 target of 19.9 million average monthly customers.
- Transit's market share increased 33 percent between 2022 and 2023, from 4.8 percent to 6.4 percent, and is on track to meet the target of seven percent or better by FY2025.
- Ridership and market share gains are driven by service and network changes that align with new regional travel patterns including better frequencies on middays and weekends and seven new Metrorail stations that connect to regional activity centers.
- Increases in frequency and network expansion have improved access to jobs by 23 percent, exceeding the target of 10 percent by 2025.
- In FY2024, Metro launched a 50 percent reduced fare program for SNAP recipients with 6,800 passes activated to date.
- Metro continues to advance community partnership and engagement: strengthened partnerships with small businesses, met the target to complete two

joint development agreements in FY2024, and established a formal community engagement office in 2024.

Interested Parties:

Amazon Housing Fund; Washington, DC Office of the Deputy Mayor for Planning; Prince George's County; Hines; Housing Opportunities Commission of Montgomery County.

Background:

The Regional Opportunity and Partnership Report describes Metro's performance on a suite of metrics that align to the Regional Opportunity and Partnership goal and objectives in the Strategic Transformation Plan (STP). The report provides transparency and monitors progress on efforts to optimize service to promote regional connectivity and transit equity and engage and partner with the community. Metro's Board and management collaboratively selected these metrics as part of STP development.

The report provides results for the following metrics:

- **Ridership**
- **Regional network and partner service optimization and transit equity metrics**
 - Rail frequent service
 - Bus frequent service
 - Destination access
 - Percent of transit market share
 - Reduced fare program enrollment
- **Community partnership and engagement metrics**
 - Inclusive contracting
 - Transit-oriented development on Metrorail properties
 - Transit-oriented development in high-capacity bus corridors (metric under development)
 - Community engagement (metric under development)

For most measures, the report compares performance for the period of July 2023 through April 2024 to the targets that Metro set for the fiscal year. Metro developed these targets considering available resources, long-term targets, and peer benchmarking—with an approach of continuous improvement. The FY2024 targets aim to make progress towards the desired levels of performance in 2028 identified in the STP.

- Targets for ridership, rail frequent service, and bus frequent service align with the service plan and fare levels included in the FY2024 budget.
- The target for destination access aims to improve over the most recent year and make progress to the FY2025 levels set in the STP.
- The target for reduced fare program enrollment was set at 8,000 passes activated by the end of FY2024. This number was derived from peer agency experience launching similar products and by estimating the size of the market (the number of SNAP recipients who use transit at least occasionally).
- The target for inclusive contracting is set according to federal regulations on a triennial basis and is 21 percent for federal fiscal years 2023 – 2025.
- The target for transit-oriented development on Metrorail properties was set at two new joint development agreements approved during FY2024, keeping Metro on the path to execute 20 agreements by 2032.

Discussion:

Transit builds the foundation for our region's economic prosperity by connecting people to places and businesses to employees and customers. New research and analysis (2024 Benefits of Transit Report) demonstrates transit's critical importance to the National Capital Region. Metro station areas hold only three percent of the region's land, but they make up 30 percent of property value (\$330 billion), 30 percent of annual property tax revenue (\$3.2 billion), and 40 percent of jobs (960,000). Metro stations have twice as many businesses, three times more jobs, and three times more property value than areas without transit. Transit yields an additional \$9.4 billion in business output.

Transit helps the region meet its visionary and ambitious goals, including fighting climate change, continuing to grow the economy, investing in affordable housing, and advancing equity and justice. It does so by connecting residents to jobs, healthcare, and education; encouraging and attracting development, affordable housing, and new businesses; providing an affordable way of travel; reducing gridlock traffic, travel time, and stress; and improving air quality and general health. By taking transit, residents have helped the region avoid 1.2 million metric tons of greenhouse gases. In addition, transit is 20 times safer than driving a car, helping the region achieve goals to reduce transportation-related fatalities and injuries.

Objective: Regional network and partner service optimization and transit equity

Metro is the backbone of a regional transit network that includes 12 local bus systems, three commuter bus systems, two commuter rail systems, a streetcar system, and a light rail system (under construction). Metrobus and Metrorail account for 75 percent of the region's service and carry about 85 percent of trips.

Regional travel trends --by car and by transit-- have changed since 2019:

- People make 20 percent fewer trips across all modes, reflecting increased telework
- More trips are happening in the off-peak, particularly midday periods
- More trips start and end at home

Over the past three years, the Metro Board and management have adapted Metro's network and fare and service levels in response to these trends:

- Ensure the Metro network connects people to regional activity centers and jobs:
 - Metrorail opened seven new stations in FY2023. The connection to Dulles Airport has increased Metro's market share sevenfold from 0.5 percent to 3.5 percent.
 - The Better Bus Network Redesign will improve destination access by connecting residents to more regional activity centers and jobs. The Year 1 proposed network does this using the same resources currently allocated to the Metrobus system.
 - Over 2,000 housing units and 422,000 square feet of office space near Metrorail stations were delivered or under construction in FY24 as part of Metro's joint developments.
- Ensure the Metro network provides service at the times that residents want to travel
 - 24/7 Bus Network launched in December 2023 and served over 100,000 customer trips as of May 2024
- Provide good frequencies all day, seven days a week – not just during peak times
 - Bus frequent service network launched in FY2022, with 36 bus lines running 12 minutes or better all-day, every-day, touching 45 percent customer trips. The frequent service network was created by reallocating existing resources, improving efficiency and effectiveness for customers
 - Through service optimization, rail frequencies improved on all lines in FY2024: 60 percent of rail customer trips experience frequent service, up from just 17 percent in FY2022
 - As a result, Metro captures *more* weekend trips than in 2019 (3.9 percent vs 3.5 percent)
- Keep transit affordable for all residents

- Eliminated transfer fees between bus and rail and implemented a flat fare on nights and weekends
- Launched reduced fare Metro Lift program for customers enrolled in SNAP, with 6,800 passes activated and almost 600,000 trips taken on Metro (70% on Metrorail) since the program began in late June 2023, for a combined savings of over \$450,000 for participants

As a result, ridership, access to jobs and transit's market share have improved:

- Ridership grew on average 20 percent in FY2024 compared to FY2023. Furthermore, ridership growth is strongest where Metro has made the biggest improvements in frequency:
 - More weekend trips are taken on Metrobus in 2024 than in 2019
 - Ridership grew 24 percent between 2019 and 2024 on Metrobus lines operating 12-min or better all-day, compared to only one percent system-wide
- Transit market share grew 33 percent between 2022 and 2023 with biggest growth in areas with transit-friendly land use and more transit service. Market share is 18 percent in areas with high access to transit
- The average number of jobs accessible by transit within 60 minutes grew by 23 percent since FY2023, increasing by about 50,000

There is still room for even more trips to be taken on transit. Regional travel data suggest that 88 percent of regional trips have a transit connection, compared to the 6.4 percent of trips that are actually taken by transit. Furthermore, Metro is running 20 percent more rail service miles than during the ridership peak in 2011 and has room to carry about a third more trips on the current service plan. There's an opportunity for further coordination and collaboration among the regional transit providers to align fares, information and networks to improve the customer experience and grow transit market share. Key actions in FY2025 to continue to make progress include:

- Advancing approval and development of year one of the Bus Network Redesign which is projected to increase access to jobs by two percent even using the same level of resources currently dedicated to service
- Continued funding FY2024 frequencies on Metrorail and Metrobus
- Partnering with the Council of Governments to create a unified vision and sustainable funding model for the region's transit network
- Continued marketing of the Metro Lift pass with regional partners

Objective: Community partnership and engagement

Metro's success depends on its integration with economic partners and the community at large. So far in FY2024, the small business program office certified 139 new small business and processed 169 recertifications, expanding our pool of eligible partners

through a dozen outreach events. Joint development on Metro property is an opportunity to bring jobs, community centers, and housing near our system. Over 2,000 housing units and 422,000 SF of office space were either delivered or under construction in FY2024 as part of Metro's joint developments, with four additional development solicitations and four joint development agreements planned in CY24.

In FY2024, Metro established a new Community Relations & Outreach office, including hiring a new Vice President in March 2024. The office has focused on amplifying best practices with the release of the 2023-2026 Public Participation Plan and training 120 internal project managers. It organized the innovative Fleet of the Future Expo on the National Mall which attracted and collected feedback from over 40,000 visitors on the design of our newest railcars and buses. The office is listening and responding to community feedback by developing multiple community-focused campaigns, including one on the danger of train surfing. A major focus of the office is to expand the community network to ensure all upcoming planned projects and initiatives, such as Summer Red Line Construction and Better Bus Network Redesign, are communicated with the impacted communities timely and effectively. Finally, the team is focused on building trust with more face-to-face interactions, such as expanded participation at neighborhood events and new efforts like summer Family Days.

Funding Impact:

There is no funding impact from presenting this information to the Board.

Previous Actions:

No previous actions.

Next Steps:

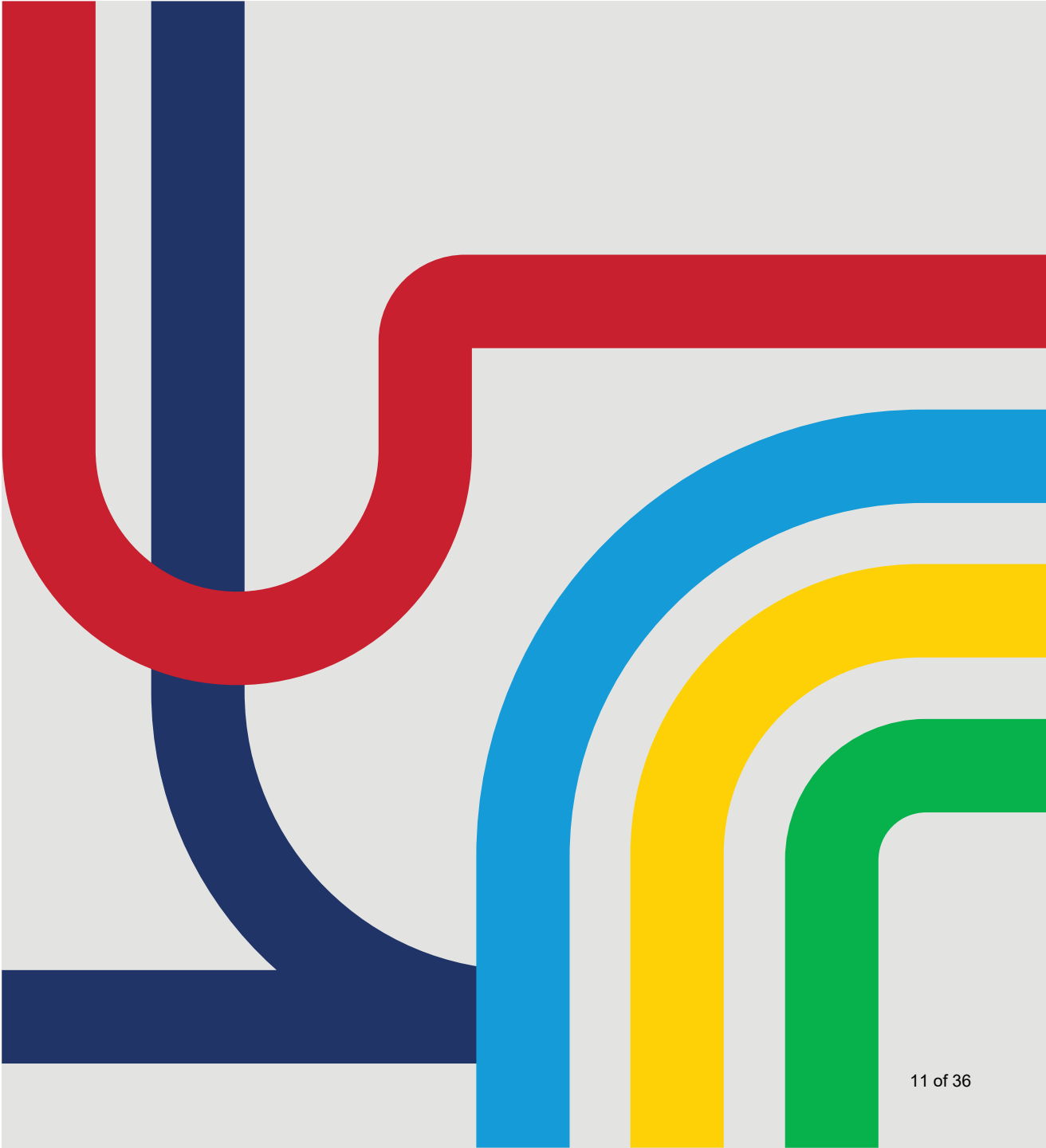
June 2025 – Presentation FY2025 Annual Regional Opportunity and Partnership Report

Recommendation:

Information Only

Regional Opportunity and Partnership

Annual Report
Finance and Capital Committee





Summary

- Investments in frequency, network expansion, and simplifying fares **increased**:
 - **Ridership**
 - May 12% higher than 2023, up 11% on Rail and 13% on Bus
 - Growing fastest on bus routes where most frequency added
 - **Transit market share** grew 33% between CY2022 and CY2023
 - Average customer has **access to** 23% – 50,000 – more **jobs** within a 60 minute or less transit ride in FY2024 compared to FY2023
- More opportunities:
 - Bus network redesign will increase connections
 - Accelerated joint development brings jobs and housing to Metrorail stations
 - Leverage partnerships to grow uptake of reduced fare pass offerings
- Community engagement expanding to promote economic growth, access to opportunity, and foster shared transit ownership





Regional Opportunity & Partnership, a strategic goal from *Your Metro, the Way Forward*

Focus today



Service excellence

Deliver safe, reliable, convenient, equitable, accessible, and enjoyable service for customers.



Talented teams

Attract, develop, and retain top talent where individuals feel valued, supported, and proud of their contribution.



Regional opportunity & partnership

Design transit service to move more people and equitably connect a growing region.



Sustainability

Manage resources responsibly to achieve a sustainable operating, capital, and environmental model.

Objectives of Regional Opportunity & Partnership Goal

Regional Network and Partner Service

Optimization and Transit | Align regional service networks, fare and service policies and supporting infrastructure to increase convenience, use of transit, equity in the region, and the role equity plays in Metro's decision making

Community Partnership and Engagement |

Collaborate with regional partners to promote economic growth, enhance access, and foster sustainable community development that supports ridership recovery & resiliency



Overview of Regional Opportunity & Partnership Metrics

	Metric	FY23 Result		FY24 Result (May)	FY24 Target	FY28 Target	Trending in the right direction?
Overall	Monthly ridership	16.6M	●	20.0M	19.9M	TBD	✓
Regional network and partner service optimization and transit equity	Rail frequent service	17%	●	60%	60%	≥75%	✓
	Bus frequent service	41%	●	45%	43%	≥50%	✓
	Destination access	223,500	●	274,300	245,850	+10% by FY25	✓
	Percent of transit market share	4.8% (CY22)		6.4% (CY23)	TBD	>7% by FY25	✓
	Reduced fare program enrollment: pass activation	0	●	6,800	8,000	≥30,000	✓
Community partnership and engagement	Inclusive contracting	23.05%		n/a	21%	≥21% through FFY25	n/a
	Transit-oriented development on Metrorail properties	0	●	2	2	≥20 agreements by 2032	✓
	Transit-oriented development in high-capacity bus corridors	under development					
	Community engagement	under development					

Notes:
Ridership: FY23 data includes rail tap-only ridership for July – December and rail tap and non-tap ridership for January – June
Transit mode share: CY24 data will not be available until 2025. No target for FY24; will be set for FY25.
Inclusive contracting: results are reported on a federal fiscal year basis, which runs from Oct. 1 through Sep. 30
Reduced fare program enrollment: Metro Lift was launched in July 2023, at the beginning of FY24

● Target met ● Target at risk ● Target missed




**When we
invest in
transit, our
community
thrives.**

2024 Benefits of Transit Report

M
metro



\$9.4b




**Additional
business output
from transit.**

\$330_b



**Property value
in Metro station
areas.**

1.2m

 **Auto trips avoided each day by 2025.**


\$27b

 **Avoided road construction costs.**

1.2m

 **Metric tons of greenhouse gases avoided by transit.**

\$2b

 **Avoided parking construction costs.**



Transit helps the region meet its visionary and ambitious goals

Select regional goals:



Move more people on transit



Fight climate change



Continue to grow the economy



TOD and affordable housing



Advance equity and justice

Transit is fundamental to achieving those goals:

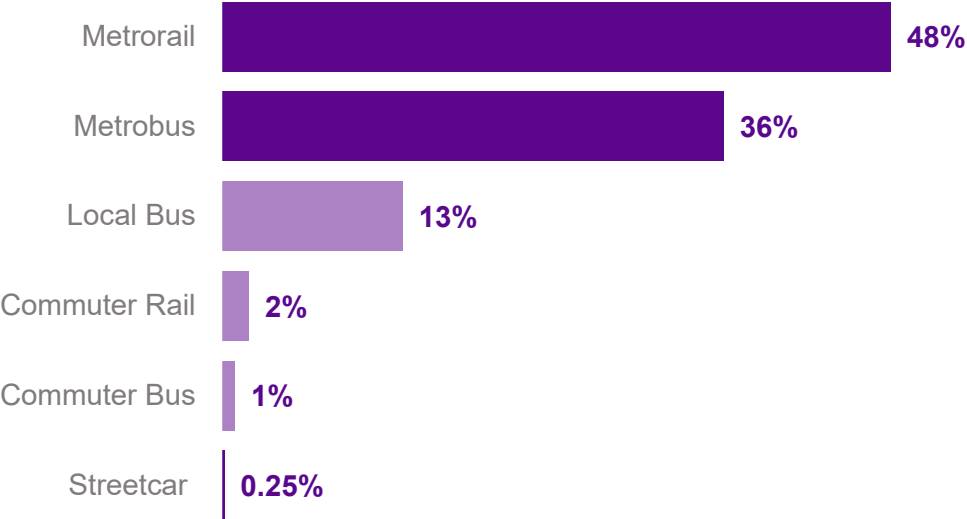
- Provides equitable, accessible, safe travel
- Expands and improves connections to jobs, healthcare, and education
- Encourages and attracts TOD, affordable housing, new businesses and investors
- Reduces cost of living, especially for lower-income residents
- Increases business access to employees and consumers
- Reduces gridlock traffic, travel time, and stress
- Improves air quality and general health
- Reduces fatalities and injuries



Backbone of the regional transit network

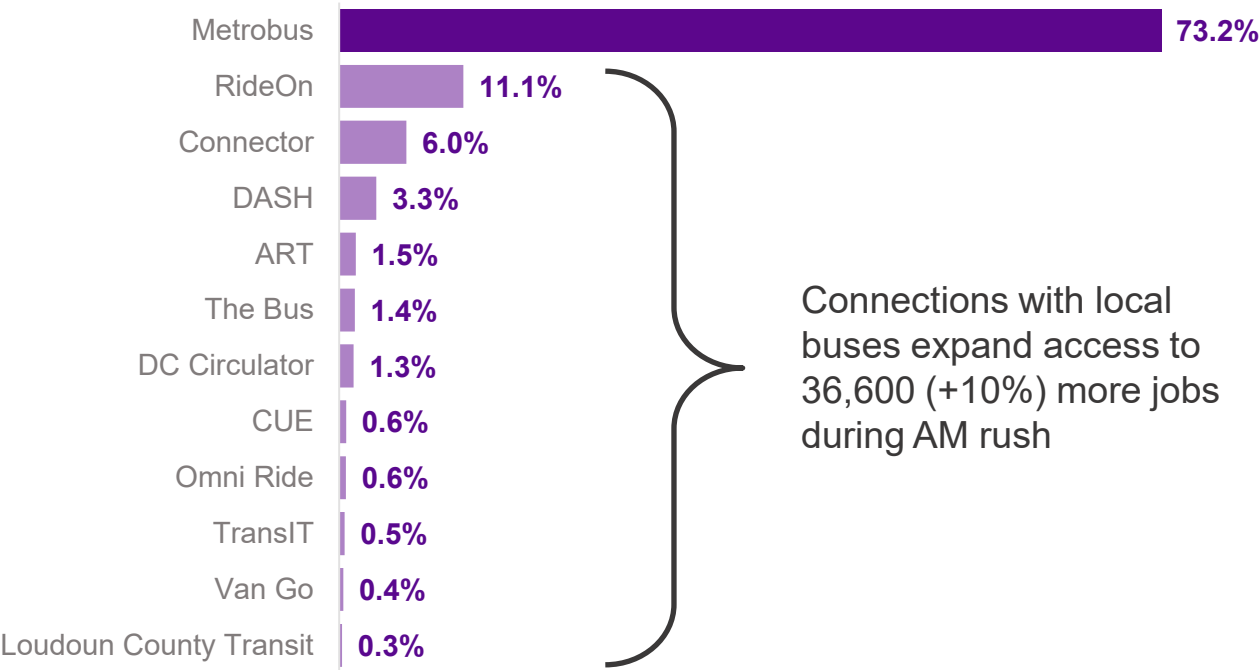
Metro carries ~85% of all transit customers; provides ~75% of the service miles in the region

DMV Transit Ridership by Mode



Source: CY 2023 National Transit Database (NTD)

DMV Bus Ridership by Provider

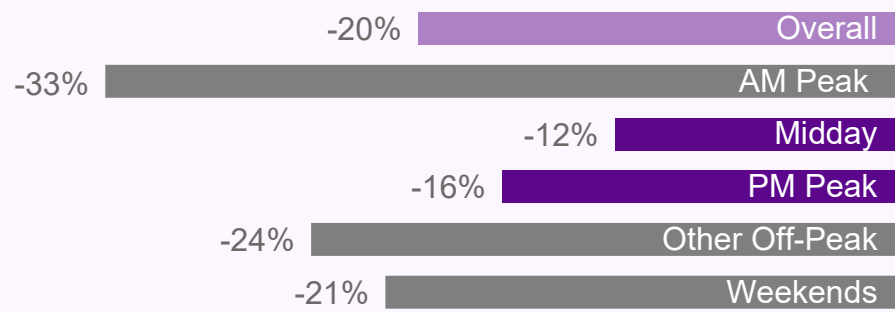




Regional travel patterns changed significantly between 2019 and 2023

Trend 1: More Off-Peak Travel

Midday period now accounts for 35% of all regional trips by any mode



Source: CY 2019 and 2023 LOCUS Location-Based Services Data

Trend 2: More Trips Start and End at Home

Three-quarters of regional trips are to/from home



...and Metro and the region adapted and invested

- All-day, frequent Bus and Rail Service, 7 days a week
- Simplified fare structure
- 7 new Metrorail Stations
- Transit-Oriented Development: 2,000+ housing units planned/under construction

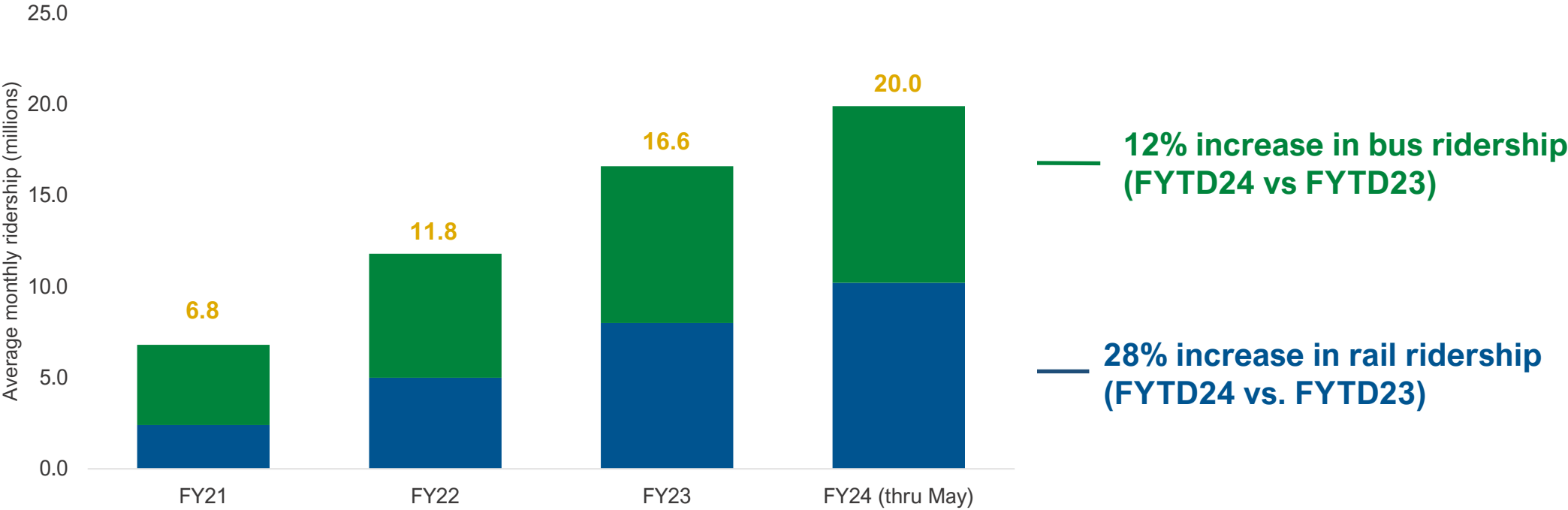


Ridership continues to grow

Average monthly ridership: 20.0 million in FY24 through May

● Met target of 19.9 million average customers per month

All Metro ridership | Metrorail | Metrobus



Note: As of January 2023, Metrorail ridership reports all (tap and non-tap) ridership.

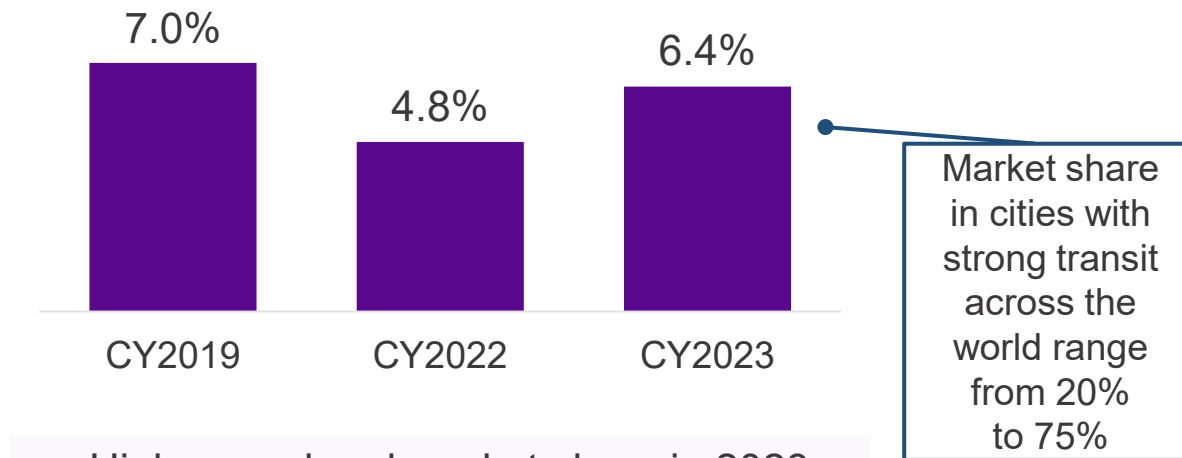
● Target met ● Target at risk ● Target missed





Transit market share grew 33% between 2022 and 2023

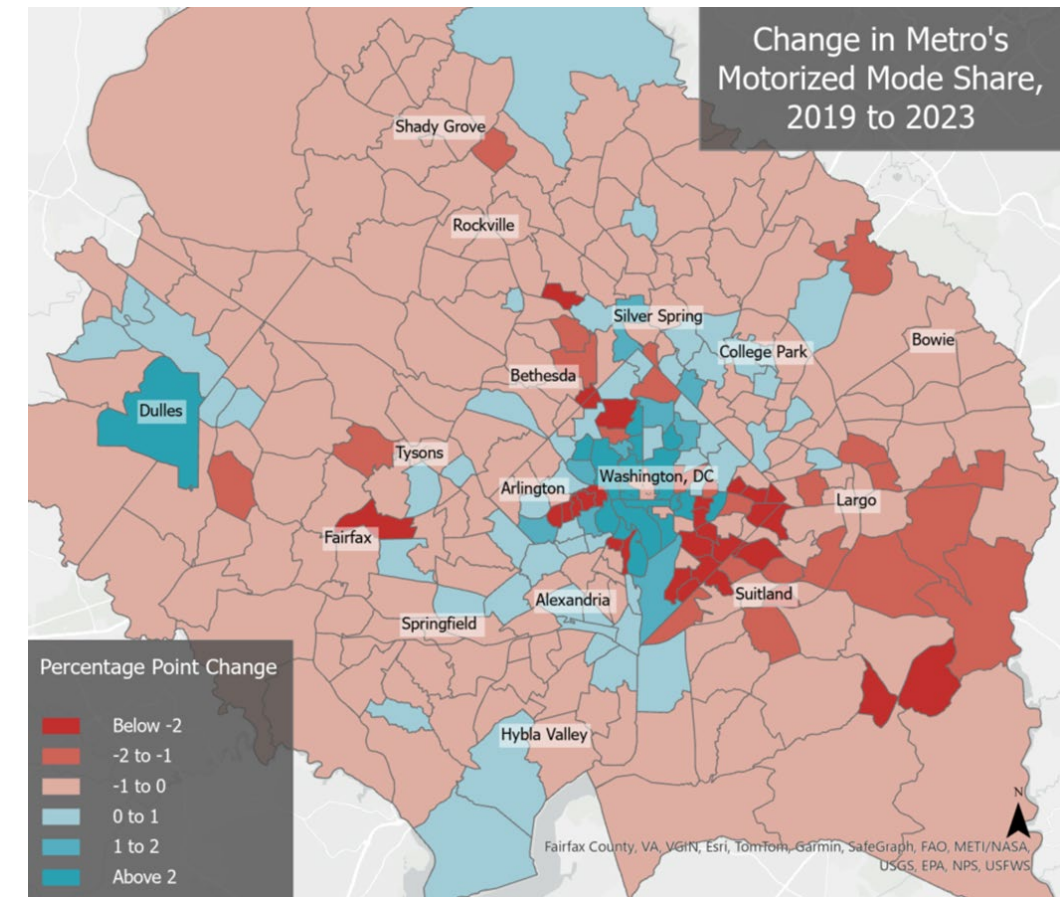
Percent of region's motorized trips taken on transit (Metrorail, Metrobus, or Regional Operators)



- Higher weekend market share in 2023 (3.9%) than 2019 (3.5%)
- ~18% market share in areas with high access to transit

Source: CY 2019 and 2023 LOCUS Location-Based Services Data

Market share grew most in areas with transit-friendly land use and more transit service

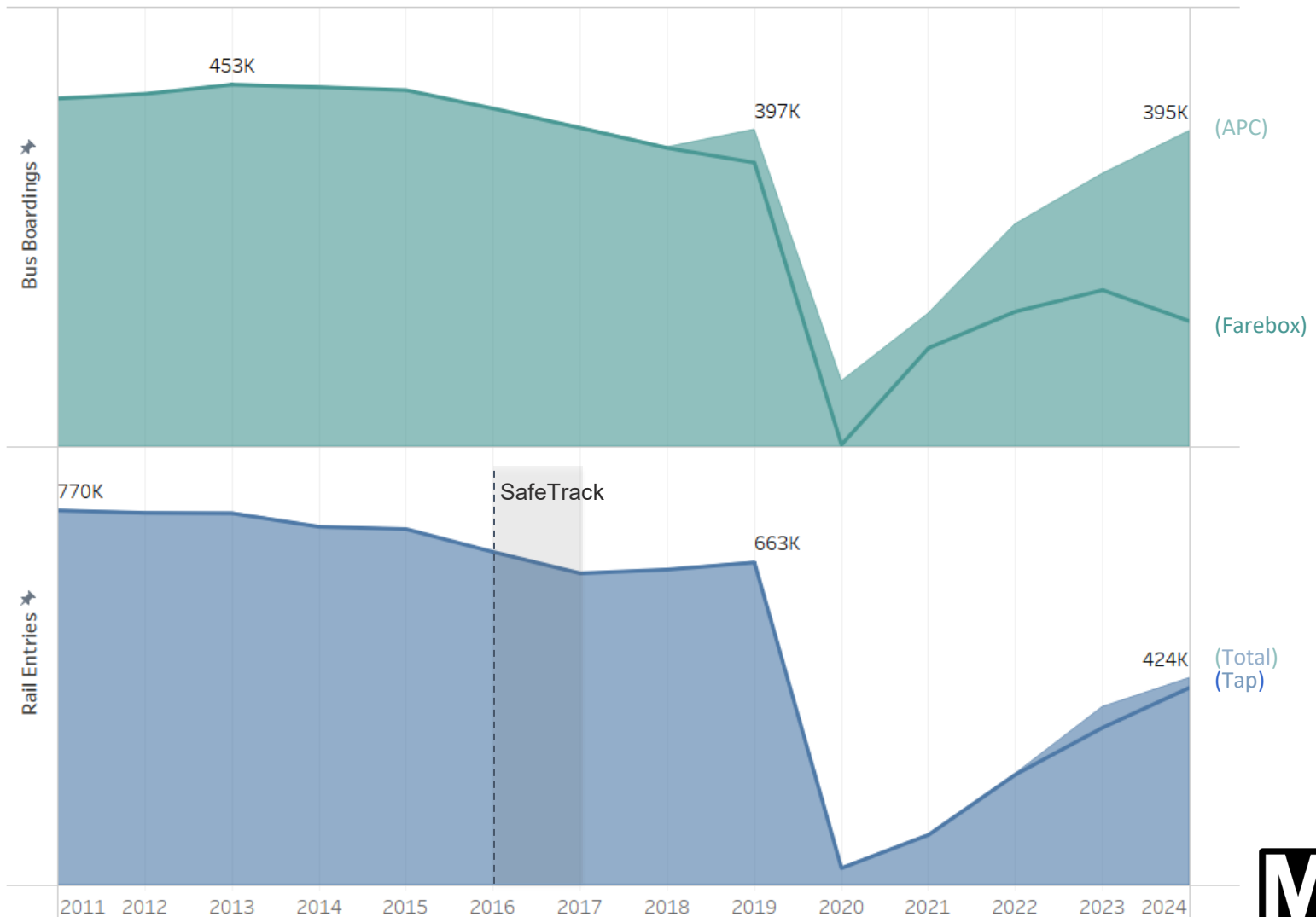




Current service plan has accommodated 20% more riders this year and has capacity to serve more

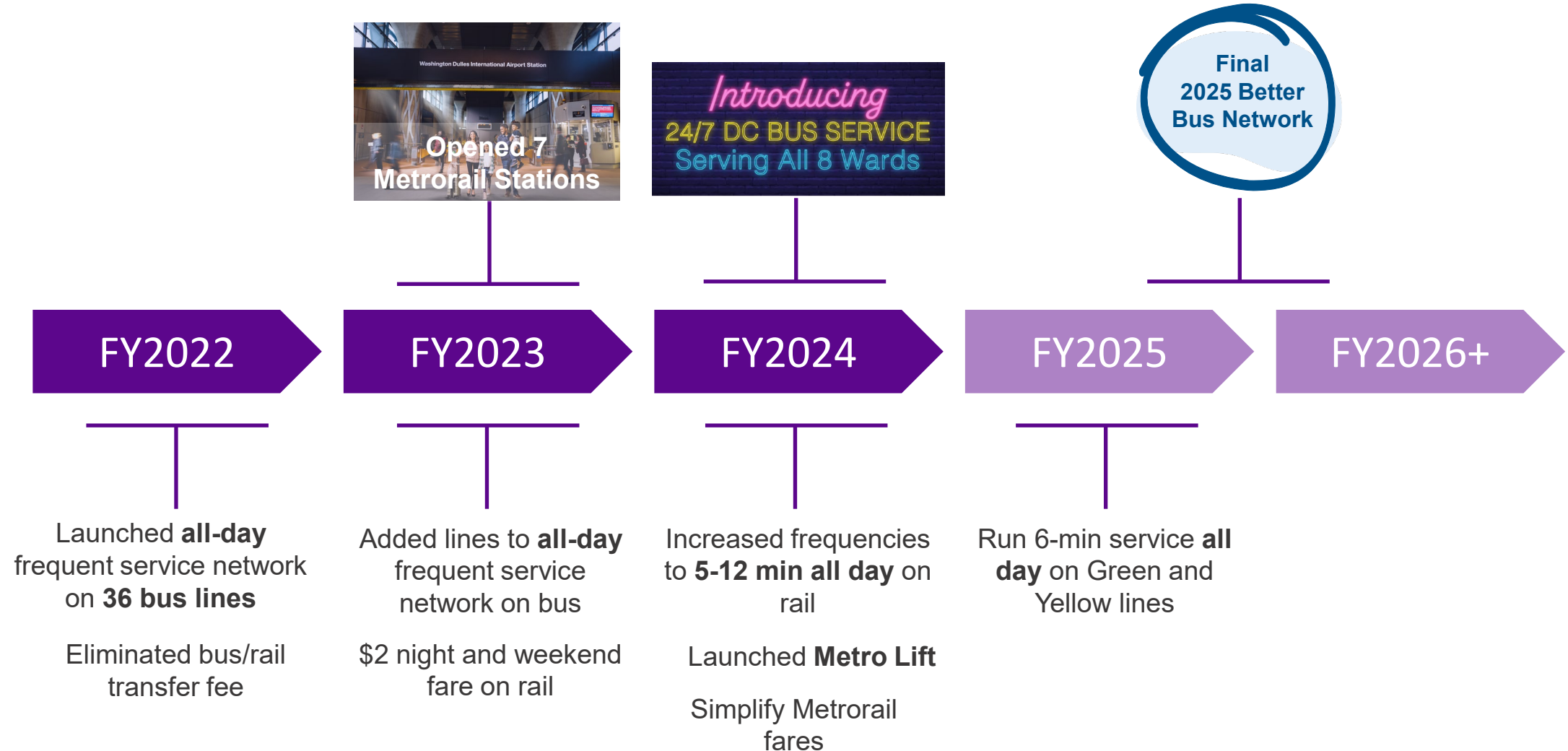
- Ridership peaked at 1.3 million average daily trips in 2012
- Metro has capacity to serve more riders with current resource levels:
 - Proposed 2025 Better Bus Network could attract **13,000 more daily weekday trips**
 - Current rail service plan could carry **33% more trips**

Average Weekday Ridership in April





Future regional growth and prosperity requires continued transit investment

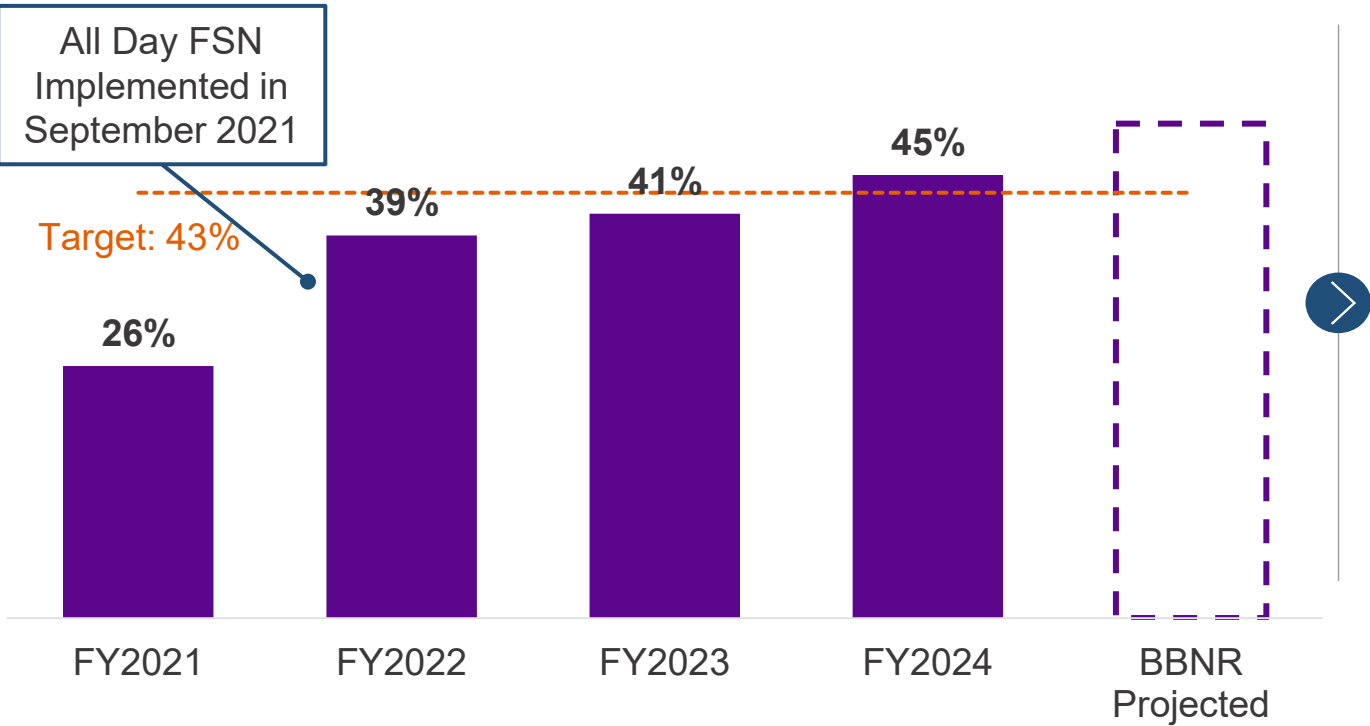




Reallocating existing resources to the frequent service network almost doubled share of bus customer trips with scheduled wait times of 12 min or less

Bus access to frequent service: Percentage of customer trips with 12 min or better frequency

● Target of 43% met



- **All-Day Frequent Service Network:** Resulted in 75% increase in access to frequent service in three years
- **Frequency drives ridership:** Increase in FY24 is due to a larger share of customer trips on the frequent service network. Ridership up 25% on lines with 12-min service vs. 1% system-wide (FY24 vs FY19, Jan-Apr)
- **Better Bus Network Redesign (BBNR):** Expected to increase access to frequent service, especially in evening and late night

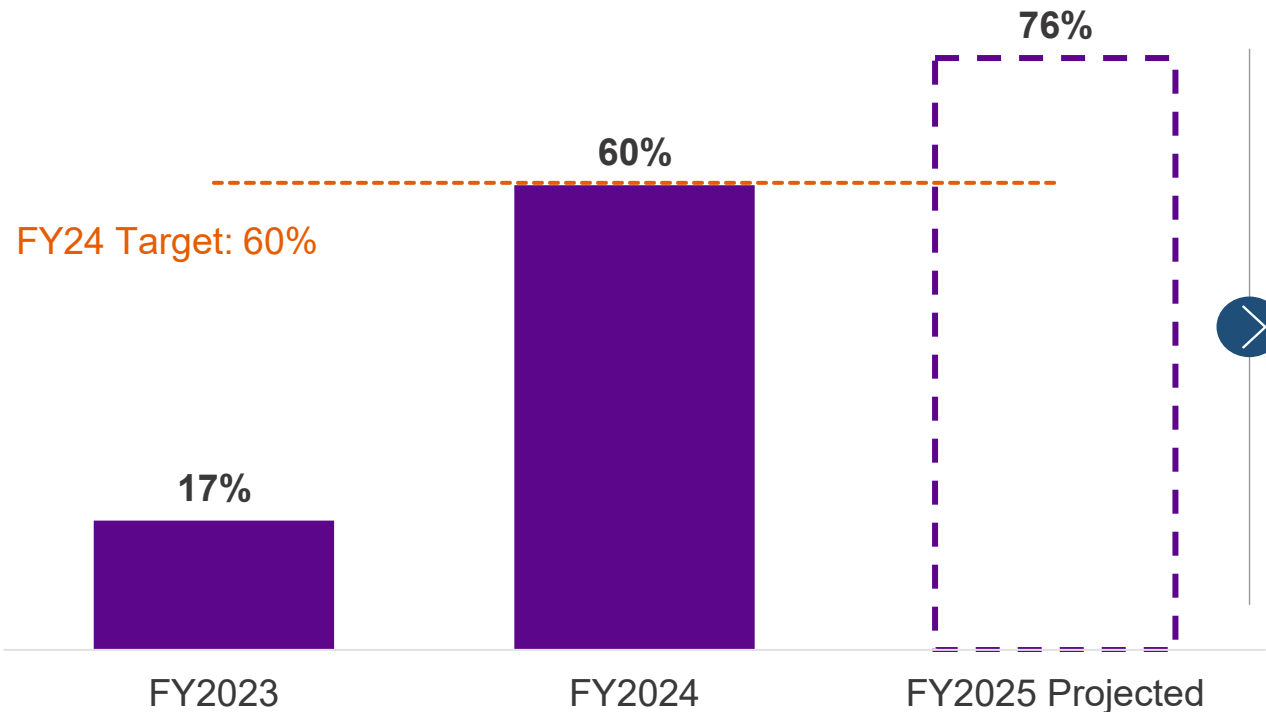




Service optimization improved access to frequent rail service over last two years

Rail access to frequent service: Percentage of customer trips with 6 min or better frequency

● Target of 60% met



- Access increased during FY24 from **44%** in July/August to **65%** in September through May thanks to 6-min peak headways on Green and Yellow lines. Average for FY24 is 58.8%
- Running 6-min all-day headways Green and Yellow would increase results to **76%**
- Further improvement would require investment in signaling upgrades and terminal capacity

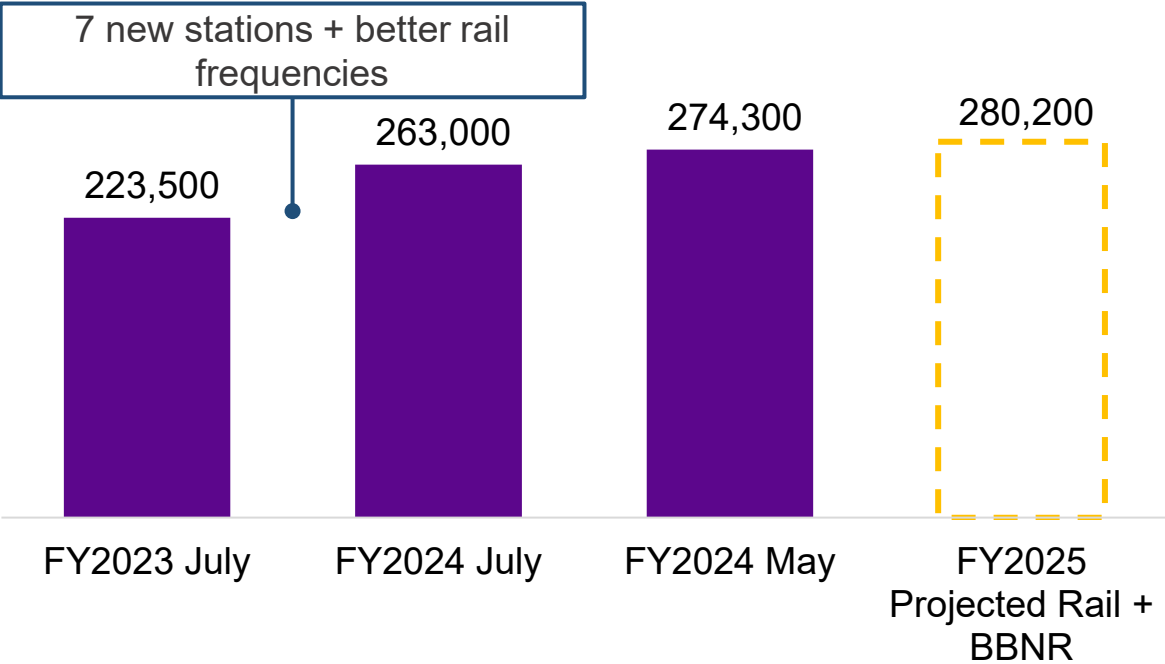
● Target met ● Target at risk ● Target missed
-- Target



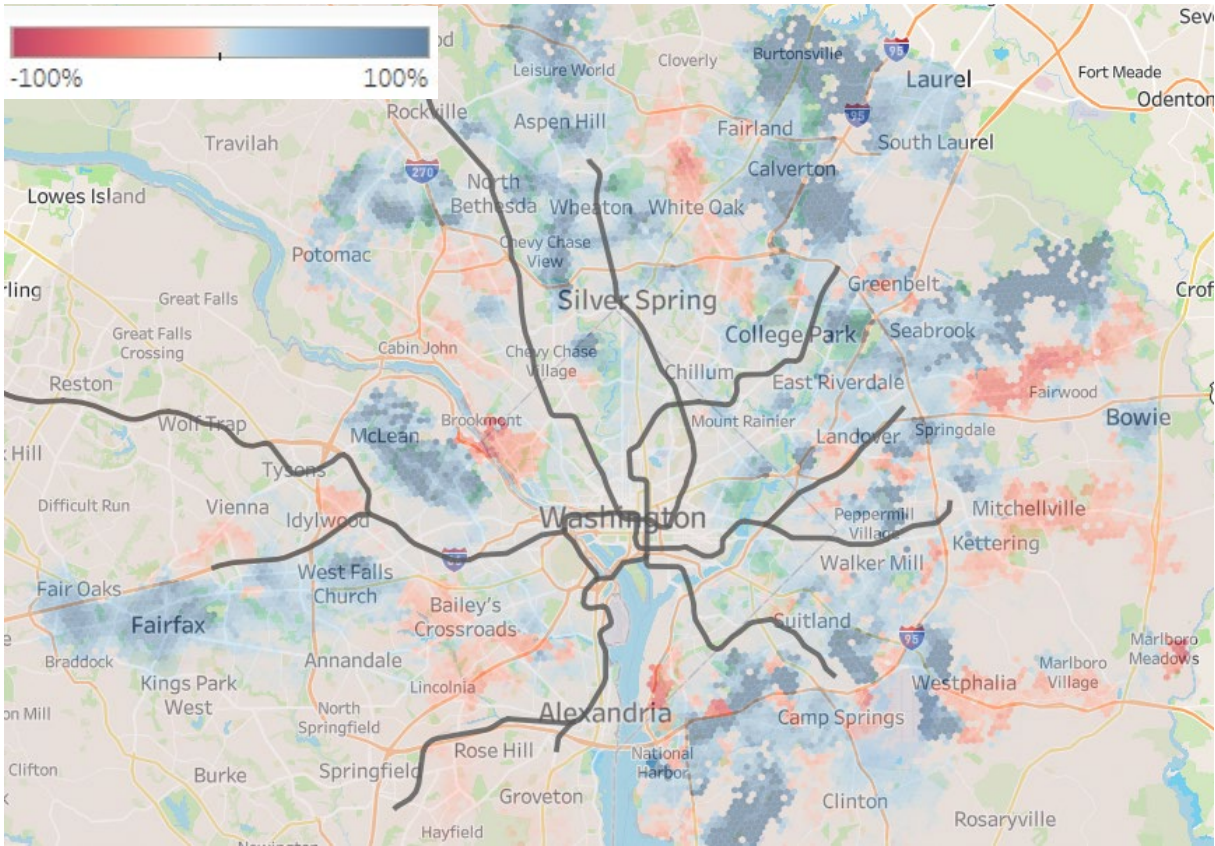
Access to 50,000 more jobs due to new rail stations and increased bus and rail frequencies all-day, all week

Average number of jobs accessible within 60 minutes increased by 23% since FY2023

● Target of 10% growth by FY2025 met one year early



Better Bus 2025 Network increases access to jobs by +2%



● Target met ● Target at risk ● Target missed
- - - Target





Highest ridership ever on several bus lines and stations

Weekend ridership on both bus and rail is particularly strong

Frequent, all-day service + transit-oriented development

↑ Ridership at NoMa vs 2019:
+13% weekdays (10,700 avg)
+32% midday and evening
+137% weekends (6,400 avg)



Frequent, all-day service + small change to route design

↑ 70% more riders vs 2019
(7,250 daily avg in May)

28A

Leesburg Pike Line

metrobus

Serves these locations-
Brinda servicio a estas ubicaciones

- King St-Old Town station
- Alexandria Commons Shopping Center
- Foxchase
- Inova Alexandria Hospital
- Southern Towers
- Northern Virginia Community College (Alexandria campus)
- Skyline City
- Bailey's Crossroads
- Seven Corners Transit Center
- East Falls Church station
- Falls Church
- West Falls Church station
- Tysons Corner Center
- Tysons station

↑ 73% more riders vs 2019
(8,200 daily avg in May)

F4

New Carrollton-Silver Spring Line

metrobus

Serves these locations-
Brinda servicio a estas ubicaciones

- Paul S. Sarbanes Transit Center (Silver Spring station)
- Takoma Park
- Hyattsville Crossing station
- Riverdale Park
- New Carrollton station

Special events drive record weekend ridership

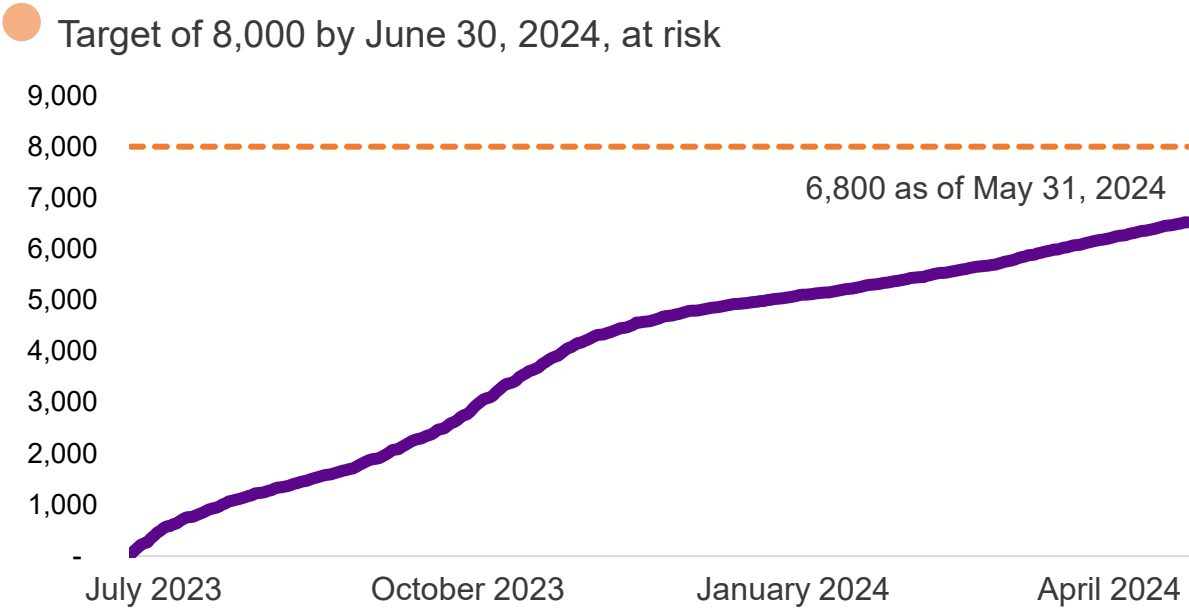
- Over 1 million bus and rail trips each weekend during Cherry Blossom season
- Nationals games led to record weekend ridership at Navy Yard in April
- More weekends over 1 million combined trips in 2024 than 2019





Customer enrollment in reduced fare program for SNAP recipients approaches target of 8,000

Total Metro Lift Passes Activated Since Launch



>10% of eligible population has enrolled and activated passes

- Target met ● Target at risk ● Target missed
—— Target

Enrollment driven by regional partnerships

- Department of Human Services in DC, MD and VA
- Silver Spring and Rosslyn commuter stores
- Food markets/pantries
- Giant Food wellness center in DC Ward 8

Next Steps

- Extend all Metro Lift passes for one year
- Continue marketing and partnerships, including joining outreach events held by regional groups
- Apply streamlined online enrollment to Senior SmarTrip
- Encourage transit operators to partners to expand regionally





Small Business Programs Office

Expanding opportunity with local small, female-owned and minority-owned businesses

Small Business Certifications

- Certified 139 new small businesses
- Processed 169 recertifications

Small Business Outreach

- Hosted and participated in 46 outreaches
- 2024 to present, hosted and participated in 12 outreaches

STP Project: Partnerships

- 44 partnerships formed to date throughout



Transit-Oriented Development Accelerating on Metrorail Properties

Two Joint Development Agreements approved in FY2024 ● Target met

Nearly 2,000 housing units and 422,000 SF of office space delivered or under construction in FY2024 as part of Metro joint developments.

Three development solicitations and the negotiation of four unsolicited proposals advanced in FY2024.

Development Solicitations / Unsolicited Proposals	Joint Development Agreements Approved	Under Construction	Completed
Solicitations: <ul style="list-style-type: none">Eisenhower AvenueDeanwoodNorth Bethesda Unsolicited Proposals: <ul style="list-style-type: none">Congress Heights Library (DMPED)Downtown Largo Library (Prince George's Co.)Twinbrook (Hines)Forest Glen (Montgomery Co. HOC)	<ul style="list-style-type: none">Deanwood LibraryDowntown Largo - Lottsford Rd	<ul style="list-style-type: none">Gallery Place: 422,000 SF officeCongress Heights (South): 179 unitsNorth Bethesda: 354 units	<ul style="list-style-type: none">Huntington: 366 unitsNew Carrollton: 291 unitsCollege Park: 451 unitsGrosvenor-Strathmore: 220 units



Project spotlight: New Carrollton

3 million SF mixed-use development in Prince George's County with Urban Atlantic

- Two office buildings (Kaiser, Metro) and 573 housing units (50% committed affordable) delivered
- Utilizing \$25.4M Amazon Housing Equity Fund investment and \$20.5M RAISE Train Hall grant

FY25 milestones:

- Metro Garage/Bus Loop Delivery
- Phase 3 residential ground-breaking
- Wetlands and Train Hall Design/Construction





Community Engagement: Building the Team and Expanding Current Practices

**Established new
Community Relations
& Outreach office**



**Amplifying best
practices**



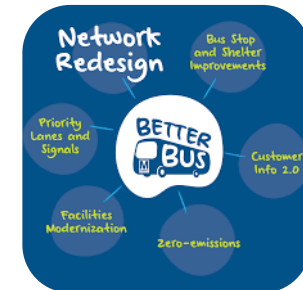
**Innovative
opportunities to
provide feedback**



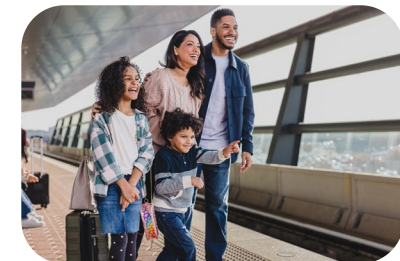
**Listening to
community feedback
to develop campaigns**



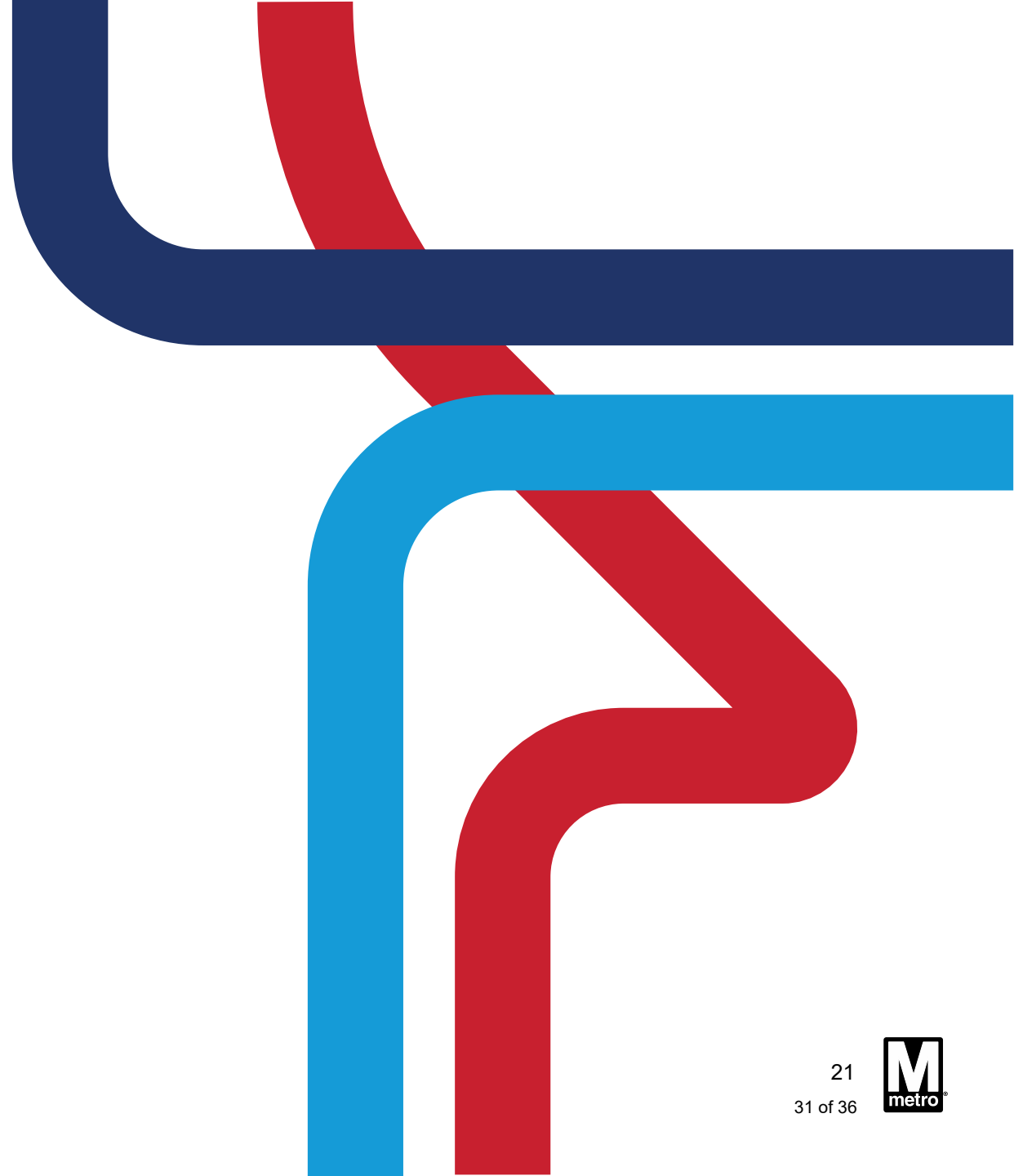
**Expanding our
community network**



**Building trust
through face-to-face
events**



Appendix





Metro Lift is part of a suite of regional reduced fare programs

Metro Lift	Senior SmarTrip	SmartBenefits	UPass	Kids Ride Free
<ul style="list-style-type: none"> 50% fare discount program for SNAP 6,600+ participants Opportunity for regional operators to join Available on mobile wallet Online and in-person enrollment 	<ul style="list-style-type: none"> 50% fare discount program for ≥ 65 123,000+ participants All regional providers Available on mobile wallet \$2 card fee waiver 20 pop-up events +700 registered in 3 months 	<ul style="list-style-type: none"> Commuter Benefits program with pre-tax contributions or direct employer benefit 2,600 agencies and >200K employees enrolled Metro, MARC, VRE, MTA, MetroAccess, vanpools Available on mobile wallet 	<ul style="list-style-type: none"> University Student Pass program, unlimited rides for \$1/day 27,000+ participants 32 participating colleges and universities Ongoing recruitment and partnership with Washington Program Consortium and prospective schools Available on mobile wallet 	<ul style="list-style-type: none"> Free K-12 student passes 40,000+ participants Apple Wallet pilot in DC with Jackson-Reed High School





Senior SmarTrip Partnerships

Community Outreach

- Department of Aging & Community Living (DACL)
- District of Columbia Housing Authority (DCHA)
- Fairfax County
- Mayor's Office of Community Affairs (MOCA)
- Maryland Department of Human Services (MDHS)
- Montgomery County Department of Transportation (MCDOT)
- SmarTrip Regional Partners

Pop Up Events since January 2024

- Ashbury Dwellings Senior Center
- Bernice Fonteneau Senior Wellness Center
- Community of Hope Resource Fair
- Congress Heights Senior Wellness Center
- Deanwood Community Center
- District of Columbia Housing Authority (DCHA)
 - Keys to Success Resource Fair
 - Job Fair
- Hattie Holmes Senior Wellness Center
- Hayes Senior Center
- James Apartments Community Dining Site
- Knox Hill Apartments Community Dining Site
- Kenilworth Recreation Center
- Mayor Muriel Bowser's FY25 Budget
 - Senior Budget Forum
 - Budget Oversight Hearing
- Martin Luther King Jr. Memorial Library
 - 1-month residency: 2/26 – 3/29
- Model Cities Senior Wellness Center
- Older Adult Transportation Block Party
- Robert F. Kennedy (RFK) Stadium Day of Play
- Saint Mary's Court Dining Site
- Washington Wellness Center



How the Washington region compares with others around the world

Transit market share of motorized travel for selected metropolitan areas around the world (pre-pandemic)

Metropolitan Area	Transit Mode Share (%)
DMV	6%
Melbourne	20%
Toronto	26%
New York City	27%
Rome	31%
Bogota	48%
Berlin	51%
Beijing	55%
Paris	75%

Source: Complexity Science Hub, The ABC of Mobility, 2024.

The USA and Canada lag the rest of the world in trips taken on transit and active modes

