



Finance and Capital Committee

Information Item IV-B

June 26, 2025

Regional Opportunity and Partnership Annual Report



Board Document

OVERVIEW			
PRESENTATION NAME	FY2025 Regional Opportunity and Partnership Report	DOCUMENT NO.	300044
ACTION OR INFORMATION	Information		
STRATEGIC TRANSFORMATION PLAN GOAL	Regional Opportunity and Partnership		
RESOLUTION	NO		
EXECUTIVE OWNER			
EXECUTIVE TEAM OWNER	Webster, Tom		
DEPARTMENT	Planning and Performance		
DOCUMENT INITIATOR	Holt, Jordan		
OTHER INFORMATION			
COMMITTEE	Finance and Capital	COMMITTEE DATE	6/26/25
PURPOSE/KEY HIGHLIGHTS	<p>Update the Board of Metro’s FY2025 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.</p> <p>Key highlights:</p> <ul style="list-style-type: none">• Ridership continues to grow and is among the strongest in the nation. Metro carried on average 21.7 million customers each month in FY2025, exceeding the target of 18.9 million. Metrorail is first among large US rail transit agencies in ridership growth and Metrobus ridership is higher than pre-pandemic.• Ridership growth is a result of strategic investments in service design that prioritize what customers value:<ul style="list-style-type: none">○ Making trips easier, faster and more frequent. Metro is on pace to meet targets for FY2025 on customer		

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	<p>access to frequent service: 69 percent of rail customer trips were on service with wait times of six minutes or less; 44 percent of bus trips were on service with wait times of 12 minutes or less</p> <ul style="list-style-type: none"> ○ Providing new connections and reducing transfers: the average customer can reach three percent more jobs in FY2025 compared to last year thanks to increases in frequency, meeting target ○ Making it easier to pay: Since its launch in May, about six percent of customer trips use Tap. Ride. Go contactless payment. Metro exceeded its target for Metro Lift enrollment by surpassing the goal of 11,200 enrollments in FY25. To date, over 13,300 customers are registered for Metro Lift. • Metro's investments in frequency have created efficiencies, lowering the operating cost per mile and hour • Transit Oriented Development grows future ridership and generates regional tax revenue. Metro met its target of approving three new joint development agreements this year, which will add over 1,100 housing units adjacent to Metrorail stations • Community engagement builds our understanding of customer needs, helps improve the customer experience. Outreach increased 13 percent in FY2025
<p>DISCUSSION</p>	<p>Metro ridership has seen 50 consecutive months of growth as of May 2025, with an average of 21.7 million trips per month in FY2025. Ridership growth is a result of strategic investments that align with customer priorities: connections to key destinations, frequency, and speed. Since FY2022, Metro has:</p> <ul style="list-style-type: none"> • Expanded the network and hours of service <ul style="list-style-type: none"> ○ Metrorail opened seven new stations in FY2023, including a new station at Dulles airport that has served 3.7 million customer trips ○ 24/7 Bus Network launched December 2023. Over half a million customer trips between 2am and 4am through May 2025, with about 30,000 average trips per month ○ Better Bus Network launches on June 29, 2025. The average resident gains access to at least five percent more key destinations (e.g., hospitals, groceries, entertainment) within 60 minutes at all times during the day/week



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- Beginning June 22, 2025, Metrorail stays open until 2am on Fridays and Saturdays and opens an hour earlier at 6am on Saturdays and Sundays
- Added frequency, focusing on good frequencies all-day and on weekends
 - Bus all-day frequent service network launched in FY2022. Access to frequent service (12 minutes or better) grew 14 percentage points, with 44 percent of customer trips on the frequent service network in FY2025
 - Rail frequencies improved on all lines in FY2024 and FY2025, with 69 percent of customer trips having scheduled wait times of six minutes or better in FY2025
 - FY2026 service plan adds 11 more bus routes to the frequent service network, as well as increases peak frequencies on the Silver and Red lines
- Increased speed
 - Added 23 miles of bus lanes since FY2022. Average bus speeds on all segments with bus priority increased by 14 percent between October 2019 and October 2024
 - Automatic Train Operation (ATO) on all six lines makes trips up to eight minutes faster
- Made it easier to pay
 - Eliminated transfer fees between bus and rail and implemented lower fares on nights and weekends
 - Launched reduced fare MetroLift program for customers enrolled in SNAP, with over 13,300 enrolled
 - Enabled students to add UPass and Kids Ride Free passes to Apple Wallet. Over 11,000 university students and over 9,000 K-12 students have converted their cards
 - Launched Tap. Ride. Go on Metrorail. In the first weeks since launch, about six percent of trips each weekday have used this new fare payment option, with higher rates on weekends and for special events

Ridership has responded to these investments, growing most where we've added the most frequency: weekends and weekday off-peak. Metrorail and Metrobus weekend ridership is over 25 percent higher in FY2025 than pre-pandemic. Metrobus weekday ridership is three



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	<p>percent higher in FY2025 than pre-pandemic, with the biggest increases in the midday period where Metro made big investments in service: Metrobus runs 13 percent more service middays in FY2025 compared to FY2019 and carries 21 percent more riders.</p> <p>The investments in frequency and speed have resulted in more efficient and effective network at a lower unit cost compared to FY2020. Metrorail will operate 19 percent more revenue miles in FY2026 compared to FY2020 at a seven percent decrease in operating cost per revenue mile. Frequent, all-day service and faster speeds through ATO have enabled more miles with the same number of trains and operators, getting more value out of available (and paid for) system capacity. Metrobus will operate nine percent more revenue hours in FY2026 compared to FY2020 at a two percent decrease in operating cost per revenue hour. Operating consistent frequencies all day is more efficient by reducing the number of vehicles required and swing shifts (which come at a pay premium), while improved scheduling practices have reduced the amount of travel to and from the beginning and end of bus routes.</p> <p>In April 2022, Metro launched a 10-Year Joint Development Strategic Plan that set an ambitious target of 20 new joint development agreements by 2032. Metro is on-track to meet the target with five agreements approved since then, three in FY2025. Since 2022, over 2,700 new housing units and 1.5 million square feet of office space on Metro property has been delivered or under construction – an important step in building new ridership around our stations and generating tax revenue for local jurisdictions.</p> <p>Metro established a new Community Relations and Outreach office in FY2024. This past year saw a 13 percent increase in community outreach events, with over 450 events conducted. The events were conducted by more efficiently leveraging Metro staff and community partners, reducing spending on contractor support by 50 percent.</p>
INTERESTED PARTIES	Northern Real Estate Urban Ventures/Nix Development Company; Hines; DC Public Library; Montgomery County Housing Opportunities Commission; Standard Communities; Banneker Ventures; EYA; Foursquares; Northpath; Urban Atlantic; EYA/Rushmark; Giant Food; Southwest BID; Howard University; HNTB
RECOMMENDATION/NEXT STEPS	June 2026 - Presentation FY2026 Annual Regional Opportunity and Partnership Report



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FUNDING IMPACT	Community engagement, transit oriented development, and service optimization – particularly investments in frequency – are key drivers of ridership growth.
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Regional Opportunity and Partnership

Annual Report
Finance and Capital Committee





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



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.

Focus today



Regional opportunity & partnership

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



Financial stewardship and resource management

Manage resources responsibly to achieve a sustainable operating, capital, and energy-efficient 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 and use of transit in the region

Community Partnership and Engagement |

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



Summary

- Ridership continues to grow and is among strongest in the nation
- Ridership growth is a result of strategic investments in service design that prioritize what customers value
 - Making trips easier, faster and more frequent
 - Providing new connections and reducing transfers
 - Making it easier to pay
- Investments have resulted in a more useful network at a lower unit cost
- Transit Oriented Development grows future ridership and generates regional tax revenue
- Community engagement builds our understanding of customer needs, helps improve the customer experience. Outreach increased 13% in FY25





Overview of Regional Opportunity & Partnership Metrics

Metric	FY23 Result	FY24 Result	FY25 Result (Jul - May)	FY25 Target	FY28 Target
Overall					
Monthly ridership	16.6M	21.1M	● 21.7M	18.9M	25M
Objective: Regional Network and Partner Service Optimization					
Rail frequent service	17%	60%	● 69%	70%	≥75%
Bus frequent service	41%	45%	● 44%	45%	≥50%
Destination access	224,600	243,100	● 250,600	250,600	+10% by FY25
Percent of transit market share	4.8% (CY22)	6.4% (CY23)	n/a	7.5%	≥9%
Reduced fare program enrollment: MetroLift	0	7,400	● 13,300	11,200	≥30,000
Objective: Community Partnership and Engagement					
Inclusive contracting	23%	7%	n/a	≥21% through FFY25	≥21% through FFY25
Transit-oriented development on Metrorail properties	0	2	● 5 (3 new)	5 (3 new)	≥20 agreements by 2032
Transit-oriented development in high-capacity corridors			Under Development		
Community engagement			Under Development		

● Target met ● Target at risk ● Target missed

55 of 76

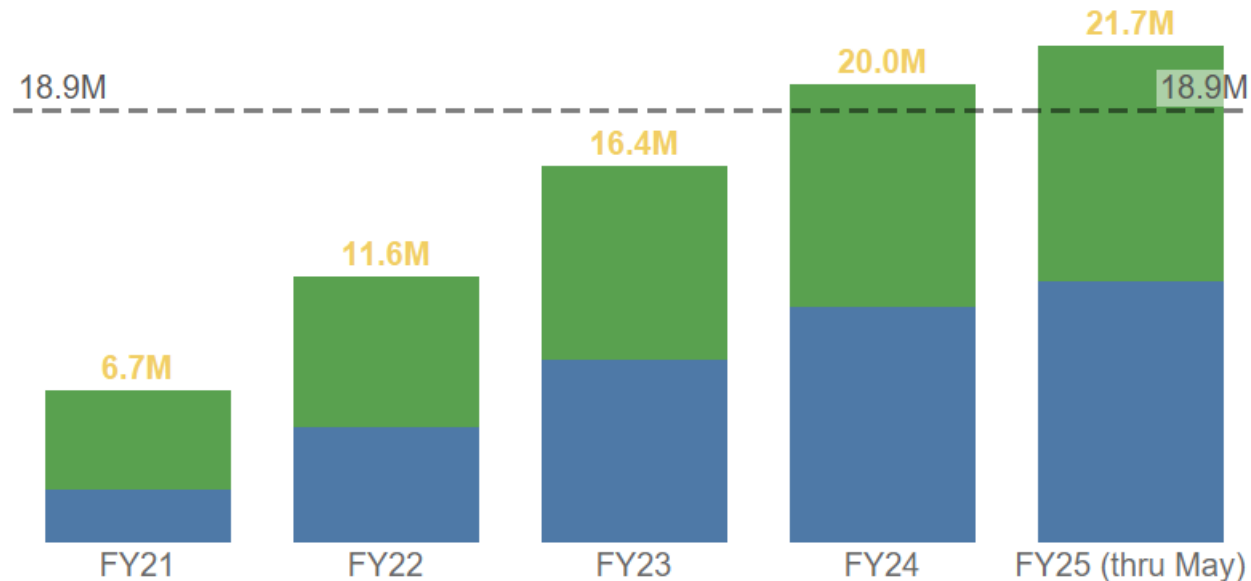


Ridership Continues to Grow and Is Among Strongest in the Nation

Average monthly ridership: 21.7 million in FY25 through May

● Met target of 18.9 million average customers per month

All Metro ridership | Metrorail | Metrobus

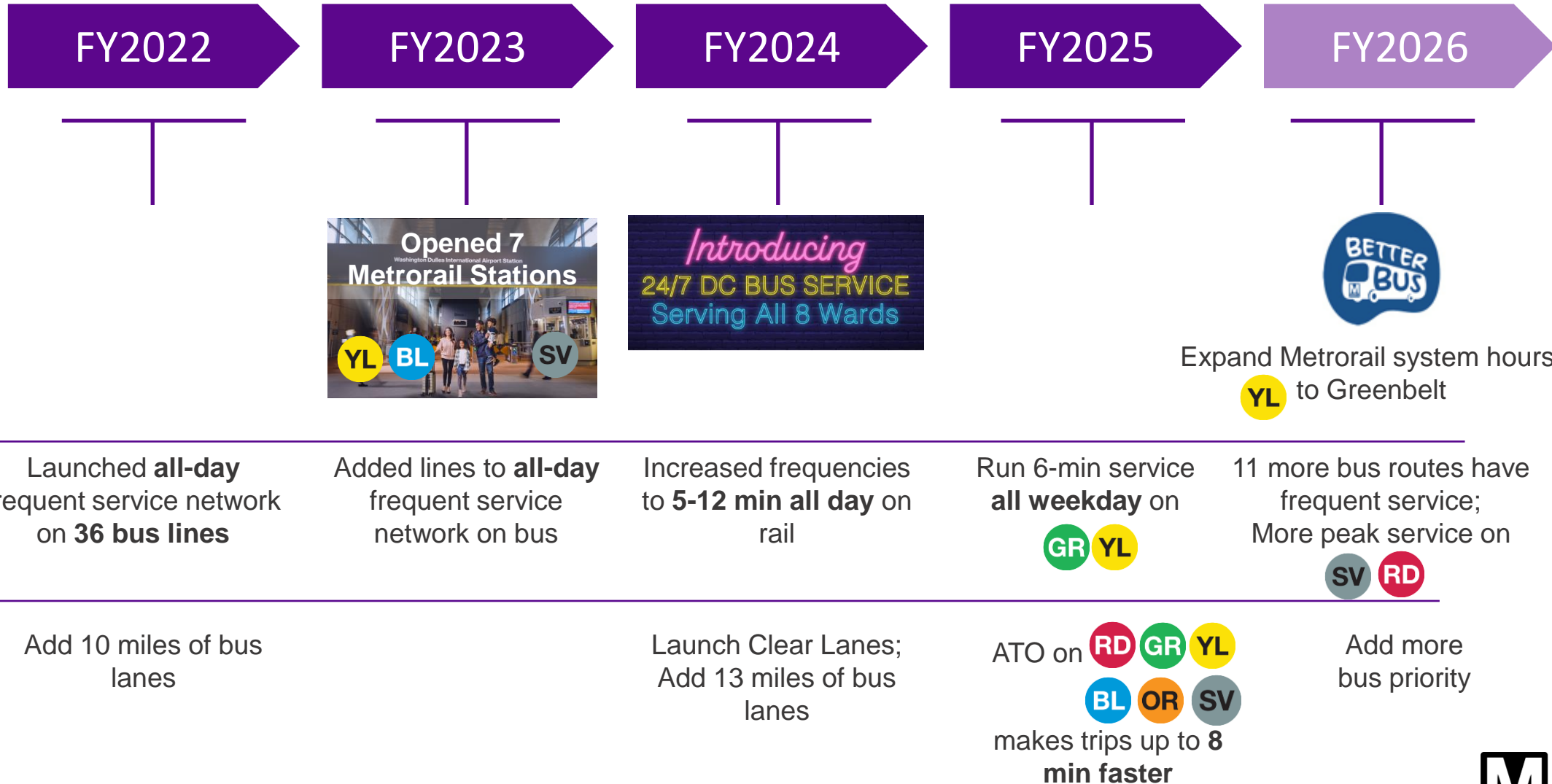


- Metrorail is first among large US transit agencies in rail ridership growth
 - 11% growth this fiscal year compared to last fiscal year
- Metrobus ridership is up 7% this fiscal year compared to last fiscal year, and higher than pre-pandemic

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

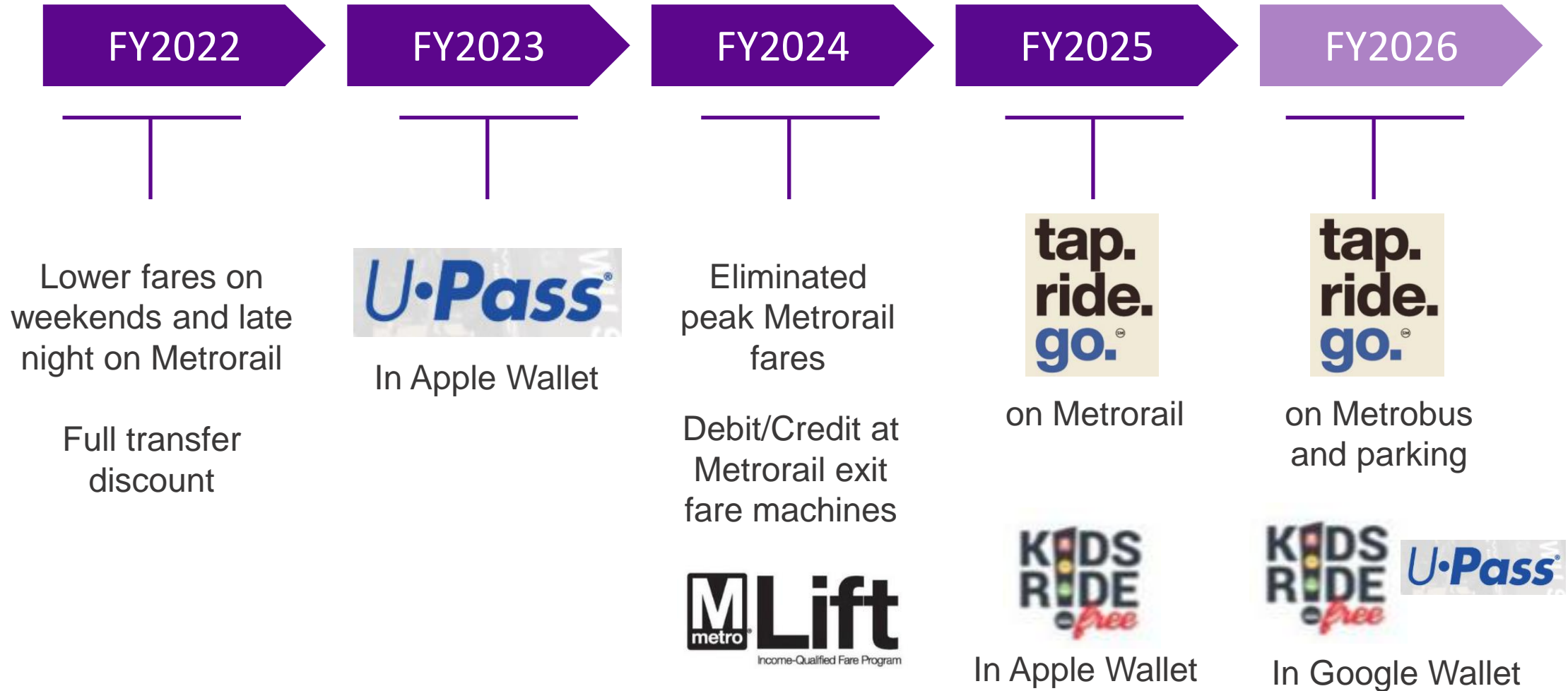


Metro Ridership Growth Driven By Investments in Span, Frequency and Speed





Metro Has Made It Easier for Customers to Pay for Their Trips



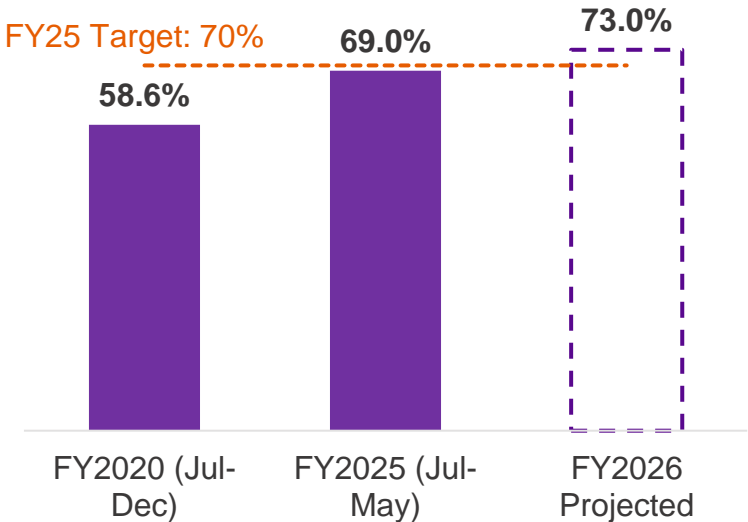


Metro’s Service Investments Have Made the Network More Useful Since FY2020

Access to rail frequent service increased 10 percentage points

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

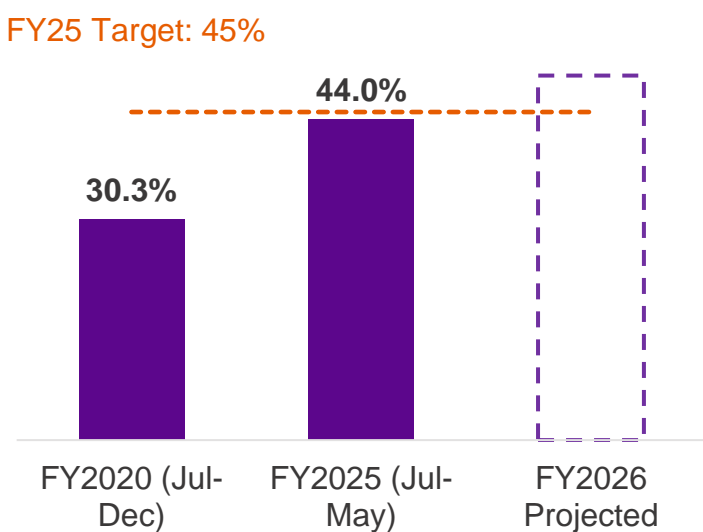
Anticipate meeting target of 70%



Access to bus frequent service increased 14 percentage points

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

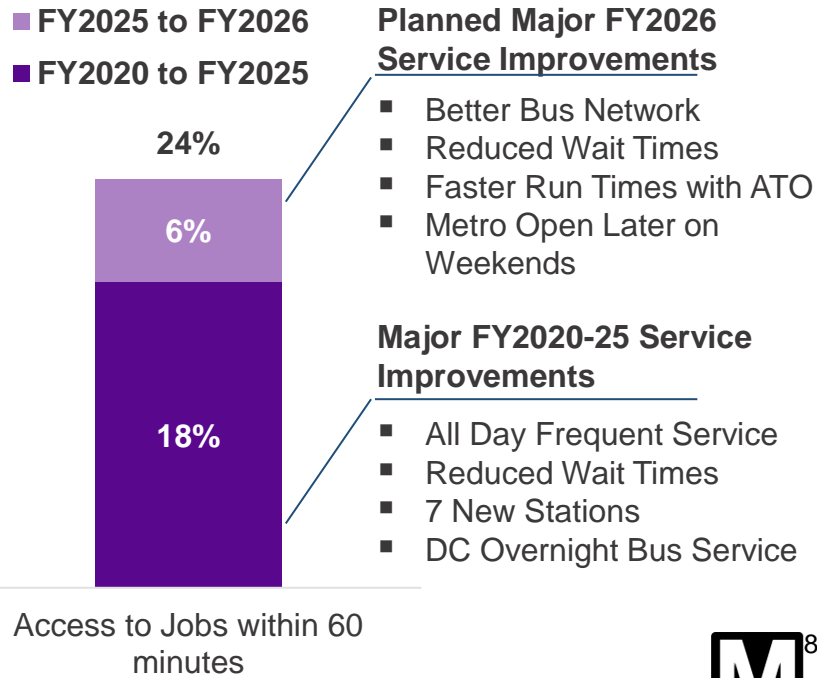
Anticipate meeting target of 45%



Access to destinations increased 18%, with another 6% increase expected next year

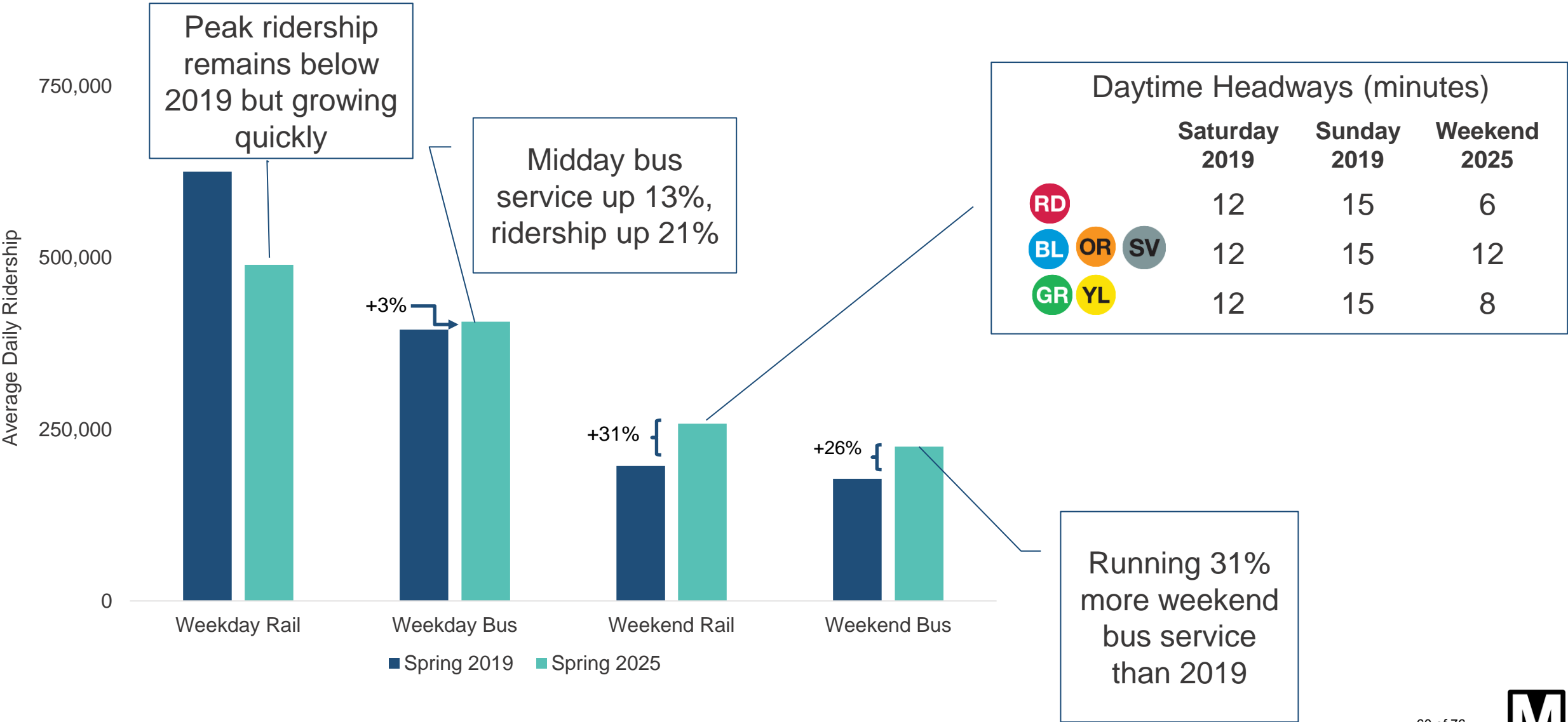
Destination access: Average number of jobs reachable on transit in 60 minutes

Target of 250,600 met





Ridership Growing Most Where Service Frequency Has Increased





Metro Is Getting More Efficient in FY26

Investments in frequency and speed will result in more service at a lower unit cost compared to FY2020

Metrorail

+19% increase in **service** (revenue miles)
(FY26 vs. FY20 budget)

-7% decrease in **operating cost per revenue mile**
(FY26 vs. FY20 budget)

Strategy:

- Align service to ridership through consistent **frequencies** all day, reducing peak vehicles and swing shifts
- Run more **frequent** service using available (and paid for) system capacity
- Make journey time **faster** through investment in ATO, enabling more miles with same number of trains and operators

Metrobus

+9% increase in service (revenue hours)
(FY26 vs. FY20 budget)

-2% decrease in **operating cost per revenue hour**
(FY26 vs. FY20 budget)

Strategy:

- Align service to ridership through consistent **frequencies** all day, reducing peak vehicles and swing shifts
- Improve **productivity** of buses and operators by reducing amount of travel to and from beginning and end of bus routes



Transit-Oriented Development on Metrorail Properties

Three Joint Development Agreements approved ● Target met



Congress Heights Library rendering



Twinbrook development rendering



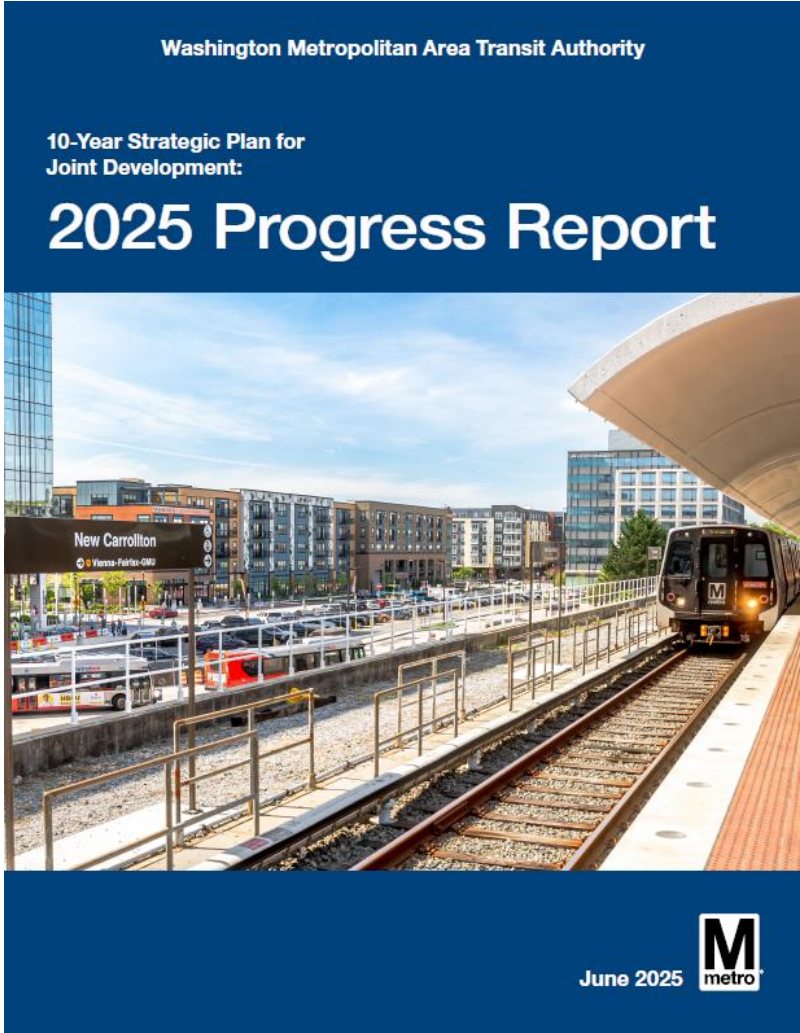
600 Fifth (former Metro HQ) construction

Development Solicitations / Negotiations	Approved Joint Development Agreements (* scheduled for FY26 Q1)	Under Construction (* or starting in 2025)
<p>Solicitations - Announced developers for:</p> <ul style="list-style-type: none">• Deanwood (NREUV/NixDev)• North Bethesda (Hines)• Capitol Heights (expected Q2 FY26) <p>JDA Negotiations</p> <ul style="list-style-type: none">• Congress Heights (DC Public Library)• Forest Glen (Montgomery Co. Housing Opportunities Commission (HOC))• Deanwood & North Bethesda	<ul style="list-style-type: none">• Takoma (EYA): 434 units• Twinbrook (Hines): 437 units• Landover (Standard): 260 units*	<p>1,271 units and 422,000 SF of office</p> <ul style="list-style-type: none">• Gallery Place (Former Metro HQ): 422,000 SF office• Grosvenor: 166 units*• New Carrollton: 364 units*• North Bethesda: 354 units• West Falls Church: 387 units*





Joint Development 2025 Progress Report



Metro's Joint Development Impact (1975-2024)	
59	projects
32	Metro stations
5.7 _{M SF}	of office development
1.3 _{M SF}	of retail development
10,800	residential units
\$220 _M	annual tax revenue
Future Joint Development	
29 _{M SF}	development potential
41	stations
\$300 _M	new annual tax revenue

In April 2022, Metro's 10-Year Joint Development Strategic Plan set target of 20 new joint development agreements by 2032.

Metro has made important progress in three areas:

1. Closing and delivering projects
2. Accelerating development negotiations and approvals
3. Advancing development opportunities



New- Metro's Development Tracker





Closing & Delivering Projects

- 8 projects closed, 8 developments delivered & 2 excess properties sold since 2022
 - **1,490 residential units** (813 affordable) & **1 Million SF** of office
 - **\$15 million** in new annual tax revenue for local jurisdictions
- 5 developments under construction or expected to break ground in 2025
 - **1,270 residential units** and **422,000 SF of office**
 - Estimated **\$22 million** in new annual tax revenue for local jurisdictions

Since 2022, over 2,700 New Housing Units and 1.5 Million Square Feet of Office Delivered or Under Construction



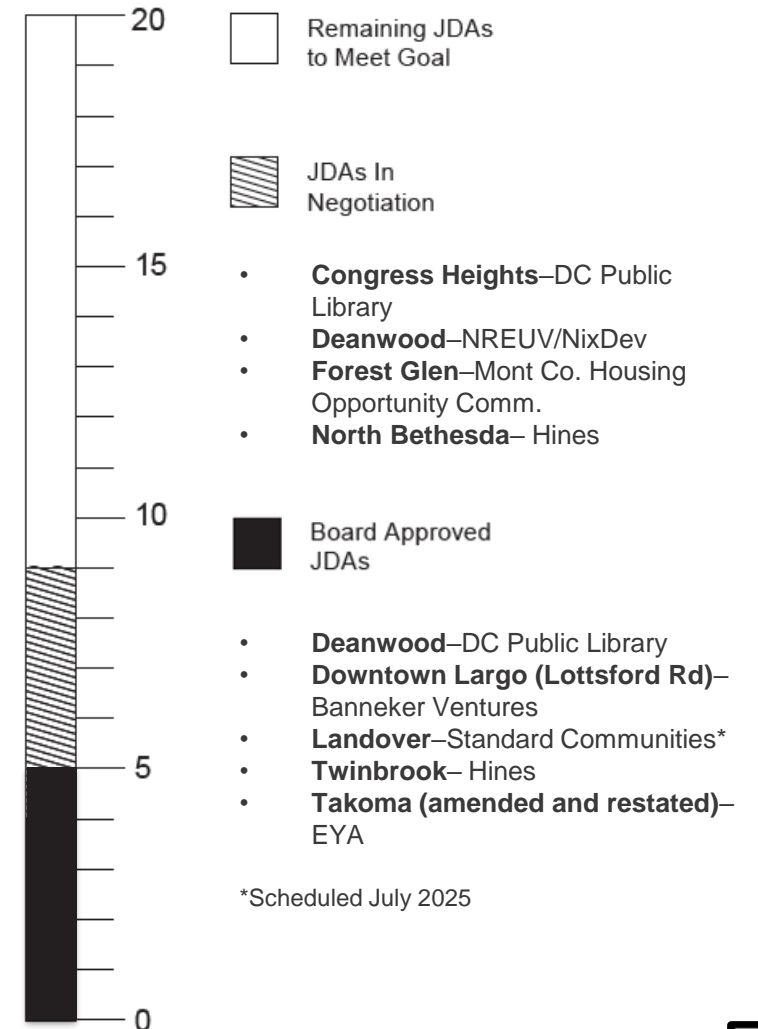
C Closed (pending construction) E Excess Property Sold
U Under Construction in 2025 D Delivered



Accelerating Development Negotiations and Approvals

- 5 new joint development agreements approved
 - Compared to 4 approvals in the 10 years prior to the 2022 Plan
 - **1,930 residential units & 95,000 SF retail/library**
- Negotiating 4 joint development agreements
 - **2,100 residential units & 884,000 SF office/retail/library**
- Goal of completing future negotiations in 6-9 months:
 - Updated transaction templates
 - Streamlined processes
 - Procured external real estate advisors and outside counsel

Goal: 20 new JDAs by 2032



Advancing Development Opportunities

- **4 solicitations released in 2024** - Capitol Heights, Deanwood, Eisenhower Ave, and North Bethesda
 - Compared to four solicitations issued in the prior 10 years
 - **Developers selected for 2 stations**
- Metro's enhanced site planning & solicitation process reduces risk & increases site marketability
 - Right-sizing transit facilities
 - Controlling costs of replacement assets
 - Updated solicitation template
- Working with jurisdictional partners to address financial feasibility challenges: **\$187 million state, local & federal investment**



Deanwood developer announcement (Northern Real Estate Urban Ventures / Nix Development Company) with District of Columbia Mayor Muriel Bowser



North Bethesda developer announcement (Hines) with Maryland Governor Wes Moore and Montgomery County Executive Marc Elrich



Metro Is Reaching Customers in *NEW* & Improved Ways

Engagement

Creating innovative, fresh ways to engage customers.



- **Metro Message: Community Conversations** highlights Metro initiatives to community leaders across the DMV.
- **Northern Bus Garage Open House** provided community opportunity to share feedback & vote for the final exhibit to be displayed in the community room.

Recognition

Celebrating riders for their courage & contributions to safety on the system.



- **Inaugural Metro Community Champions** December 30, 2024, recognizing Metro riders who have gone above and beyond.
- **Art In Transit Earth Day** celebrating students' artwork from across the DMV highlighting Metro's contributions to clean air.



Metro Is Reaching Customers in *NEW* & Improved Ways

Volunteerism



Establishing volunteer initiatives to demonstrate our commitment to customer needs.

- **7th Annual Fill-A-Bus** provided 46,711 meals for families across the DMV, exceeding last year's goal by **25%**.
- **FitDC HerStory 5k** Metro Hype Zone staff interacted with 1,000+ participants along the race route. Metro fare and service information was shared at the finish festival.

Collaboration



Expanding Metro's partnerships to enhance the customer experience.

- **Metro Live Concerts** Returned featuring local artists in partnership with the Southwest Bid.
- **Howard University SpringFest** welcomed incoming and current students, allowing Metro to give resources on navigating DC via Metrorail and Metrobus.



Impact By The Numbers

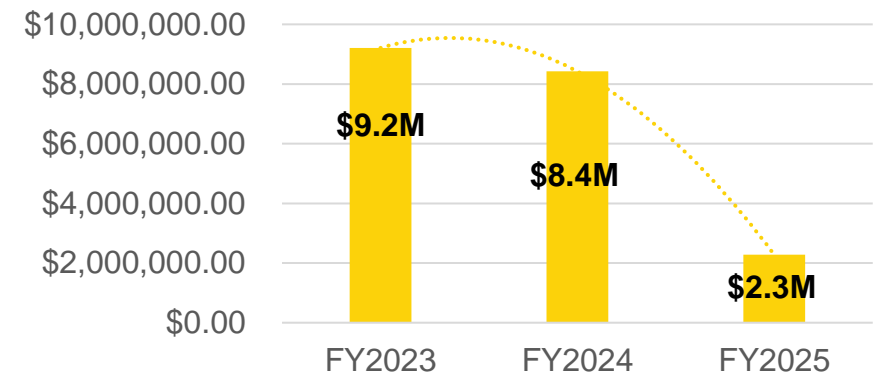
- **450+** Community Events
- **25k+** Direct Customer Interactions
- **100K+** attendance/reach

- **25% increase** in engagement with non-English speaking customers
- **13% increase** in total Community Outreach events from FY24 to FY25

- **60+ NEW outreach events with** regional partners through our newly implemented online Community Event Request Form
- Expanded our reach to Metro customers through enhanced **Public Participation Plan** execution (signage, events, messaging)

- Tracking toward **50% reduction** in contactor support between FY24 and FY25
- Tracking toward **20% reduction** in contactor support beyond FY25

Contractor Spending FY2023 – FY2025





What's On The Horizon



Better Bus Strategic Outreach & Engagement

- 100+ Regional Community Events
- Public Messaging Campaign Support
- Jurisdictional partners & elected officials outreach



Increasing Community Relations team capacity

- Refining all outreach and engagement processes
- Redefined roles & responsibilities of the Community Relations & Outreach team.



Increased Engagement with Student Riders

- Continued engagement with MTPD Youth Advisory Council and school districts on the dangers of Train Surfing
- Kids Ride Free (K-12)
- College Partnerships
- Targeted Better Bus engagement with school communities



Special Events Planning Support

- MetroFest 2025
- Metro (Rail) 50th Anniversary
- Metro Community Relations & Outreach / Health & Wellness collaboration events to include Bike To Work Day, Bike DC, Marine Corps Marathon

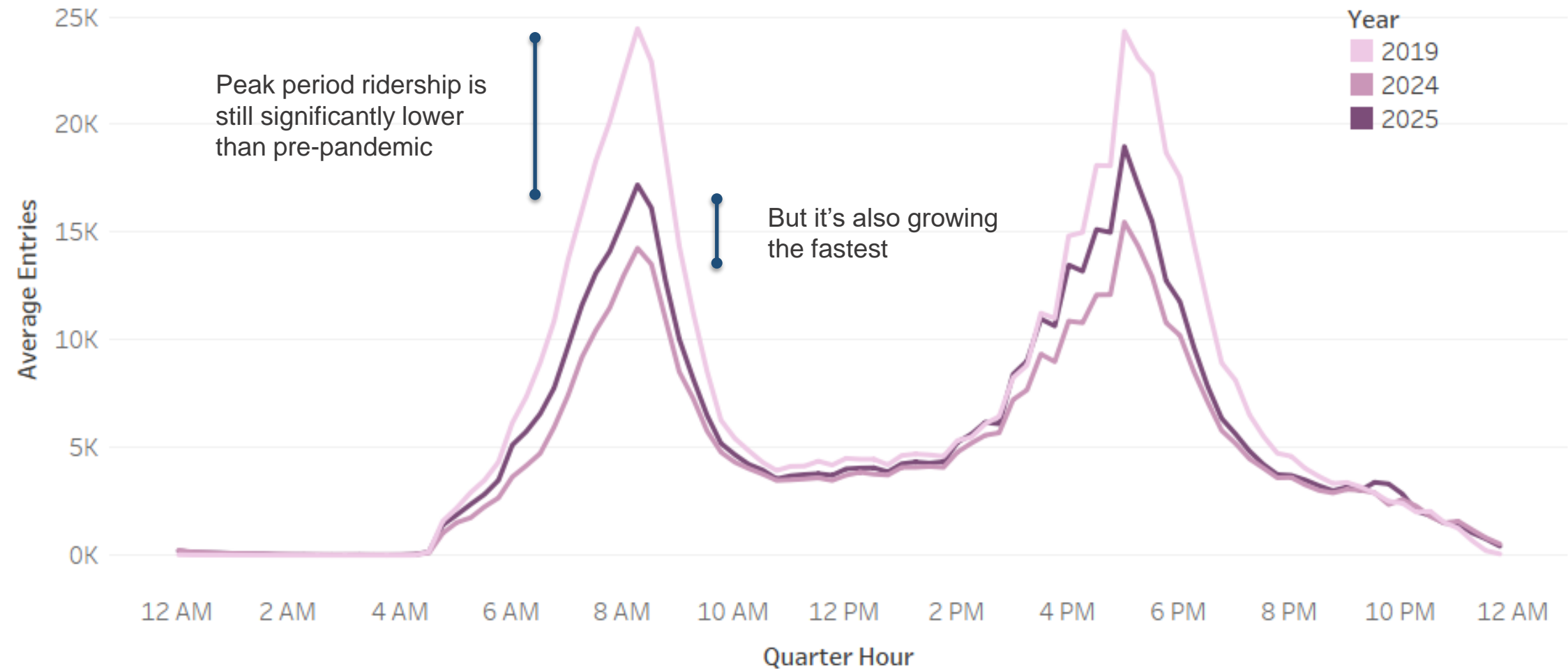


Appendix





Peak-Period Rail Ridership Is Growing Quickly, With Similar Patterns as 2019





Frequent Service Has Expanded Access to Regional Events

**460K World Pride
trips, busiest since
2012**



**600K fans rode to Nats
park in 2024 (30%
attendance)**



**1.13M trips on peak
bloom weekend in
March 2025**





Metro is more efficient

Investments have resulted in a more useful network at a lower unit cost

	FY20 Budget	FY26 Budget	Change from FY20
Metrorail			
Revenue miles	99.8 million	118.7 million	+19%
Operating cost per revenue mile	\$13.25	\$12.38	-7%
Metrobus			
Revenue hours	3.8 million	4.2 million	+9%
Operating cost per revenue hour	\$210.95	\$207.01	-2%

Note: Operating costs adjusted for inflation using U.S. Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) for DC-VA-MD-WV region



Current Joint Development Station Prioritization

*Station groupings are subject to change with planning progress or funding commitments

Group 1

Existing JDAs and Solicitations

- Capitol Heights 
- Congress Heights (DCPL) 
- Deanwood (DCPL) 
- Deanwood (NREUV/Nix) 
- Downtown Largo (Banneker) 
- Forest Glen (MoCo HOC) 
- Grosvenor-Strathmore 
- (Foursquares)
- Hyattsville Crossing (Northpath) 
- Landover (Standard) 
- New Carrollton (Urban Atlantic) 
- North Bethesda (Hines) 
- Takoma (EYA) 
- Twinbrook (Hines) 
- West Falls Church 
- (EYA/Rushmark)

Group 2

Priority Solicitations: 2025-2028

- Braddock Rd
- Brookland-CUA
- College Park (West)
- Eisenhower Ave
- Glenmont (West)
- Greenbelt
- Huntington (South)
- Morgan Blvd
- Rockville
- Twinbrook (West)
- West Hyattsville (East)





Group 3

Future Solicitations: 2029-2032

- Downtown Largo
- Fort Totten
- Friendship Heights
- Shady Grove
- Silver Spring
- Twinbrook (East)
- Vienna
- Wheaton

Group 4

Additional Planning Required

- Addison Rd
- Anacostia 
- Bethesda
- Branch Ave
- Cheverly 
- East Falls Church
- Glenmont (East)
- Huntington (North)
- Landover (Parking)
- Naylor Road 
- Southern Avenue 
- Suitland
- Van Dorn St



Solicitation



JDA Negotiation



Board Approved JDA



Executed JDA /
Ongoing construction



Solar installation



Small Business Programs Office

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

Engagement

Metro's Small Business Programs Office Presents: Meet the Primes

Type of event: SBPO Calendar

Thursday March 27, 2025

10:00 AM - 1:00 PM



METRO'S SMALL BUSINESS PROGRAMS OFFICE PRESENTS

Meet the Primes: Connecting Small Businesses to Opportunities
Gilbane, WSP, Parsons & Mott MacDonald

Join us in person to network with industry leaders and explore potential partnership opportunities. Learn about upcoming projects, procurement processes, and how your business can collaborate with WMATA's prime contractors. Don't miss this chance to connect and grow your business. Spots are limited so reserve your spot now!

Metro Building at New Carrollton | 4100 Garden City Drive | Hyattsville, MD 20785
Lobby Conference Room | Thursday, Mar. 27, 2025 | 10 a.m. - 1 p.m.



Sneak Peek into 2025 Outreaches

- WMATA & HNTB Collaboration
- Meet the Primes projected for March, June and October
- Quarterly Certification Workshops
- Monthly Virtual Outreach
- Hispanic Heritage Month Outreach projected for September

Outreach



METRO'S SMALL BUSINESS PROGRAMS OFFICE PRESENTS

Get Certified with Metro Workshop

Join us IN PERSON on Wednesday, April 30, 2025 | 10 a.m. - 12 p.m.

Metro Building at New Carrollton | Lobby Conference Room | 4100 Garden City Drive | Hyattsville, MD 20785

Discover the pathway to Metro certification for small businesses in this webinar. Gain insights and practical tips on how to successfully navigate the certification process, opening doors for your small business to thrive in collaboration with Metro. Presented by Michael Bing, Small Business Analyst

- **Metro's Meet the Primes** provided our Small Business Programs participants the opportunity to network with industry leaders to explore potential partnerships and learn how to effectively collaborate with WMATA and its prime contractors.