

# 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





Transit builds the foundation for our region's economic prosperity:  
It connects people to places and businesses to employees and consumers



**\$9.4b**

Additional business output from transit.

**1.2m**

Auto trips avoided each day by 2025.

**1.2m**

Metric tons of greenhouse gases avoided by transit.

**\$330b**

Property value in Metro station areas.

**\$27b**

Avoided road construction costs.

**\$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

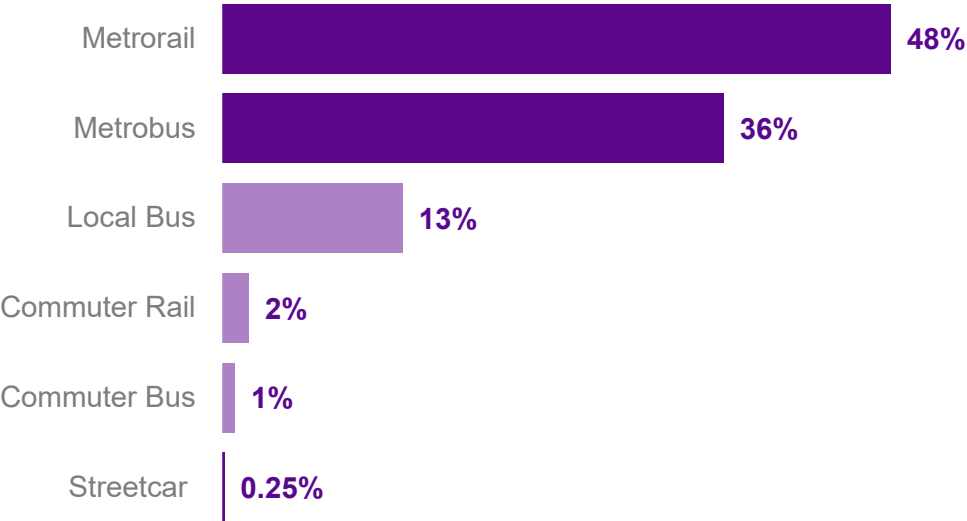




## Backbone of the regional transit network

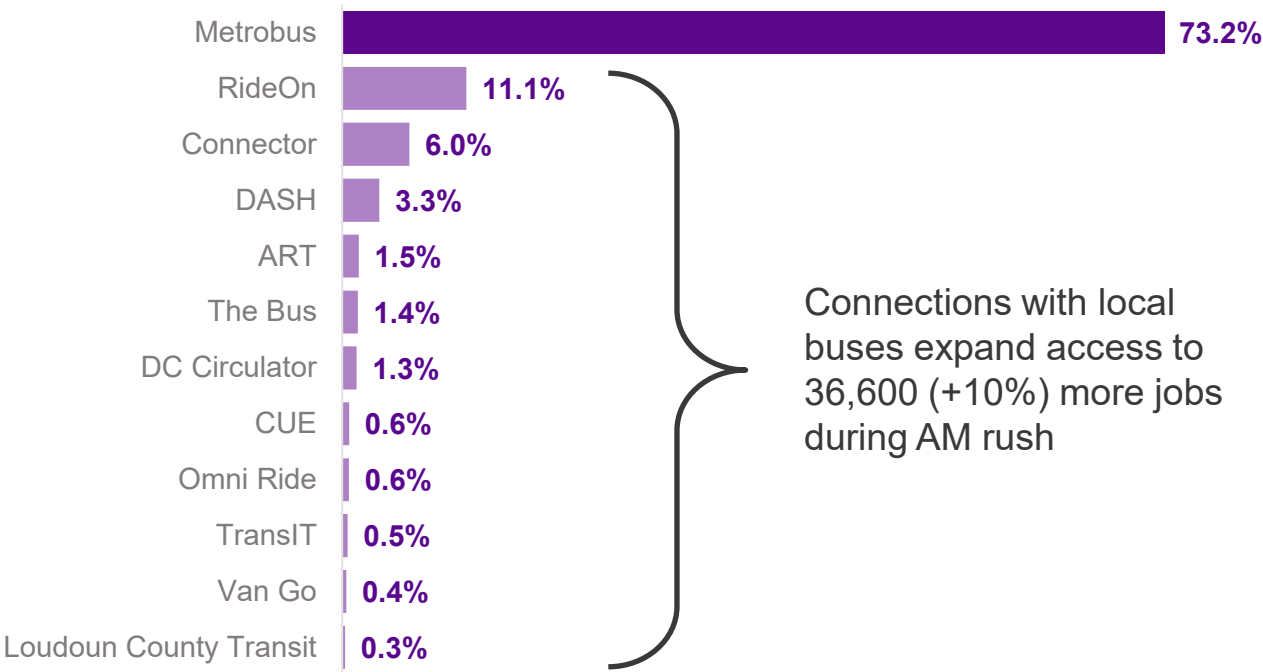
Metro carries ~85% of all transit customers; provides ~75% of the service miles in the region

DMV Transit Ridership by Mode



Source: CY 2023 National Transit Database (NTD)

DMV Bus Ridership by Provider

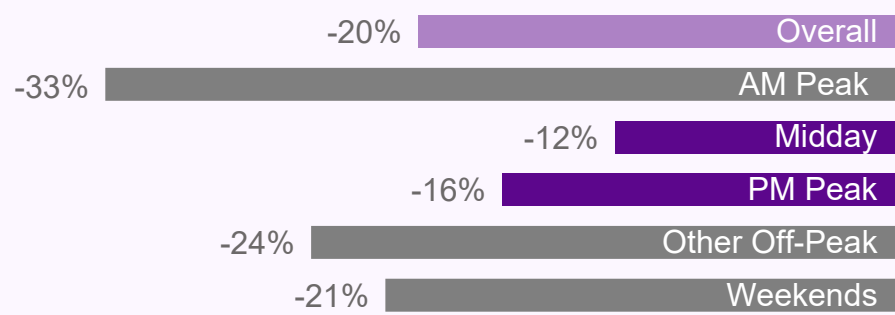




## Regional travel patterns changed significantly between 2019 and 2023

### 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



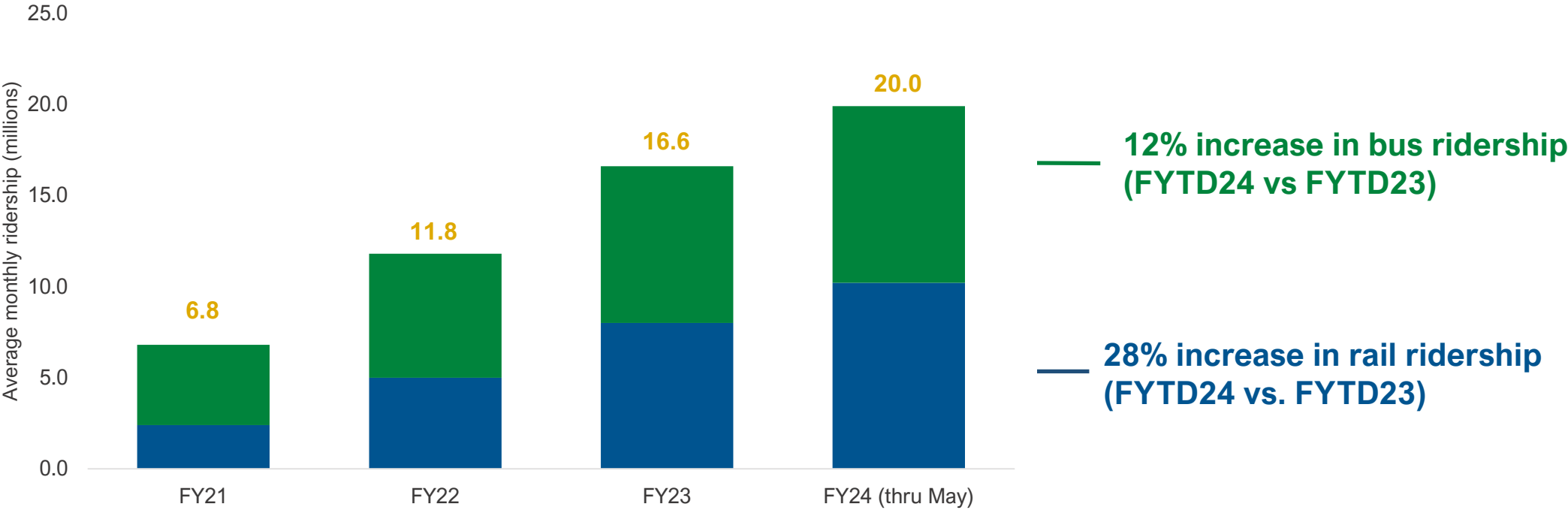


# Ridership continues to grow

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.

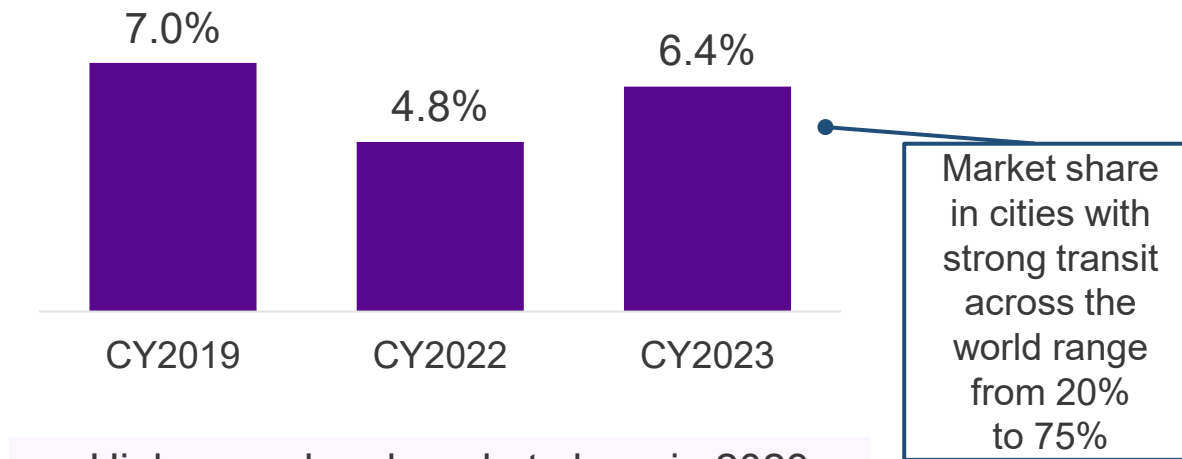
● Target met    ● Target at risk    ● Target missed





## Transit market share grew 33% between 2022 and 2023

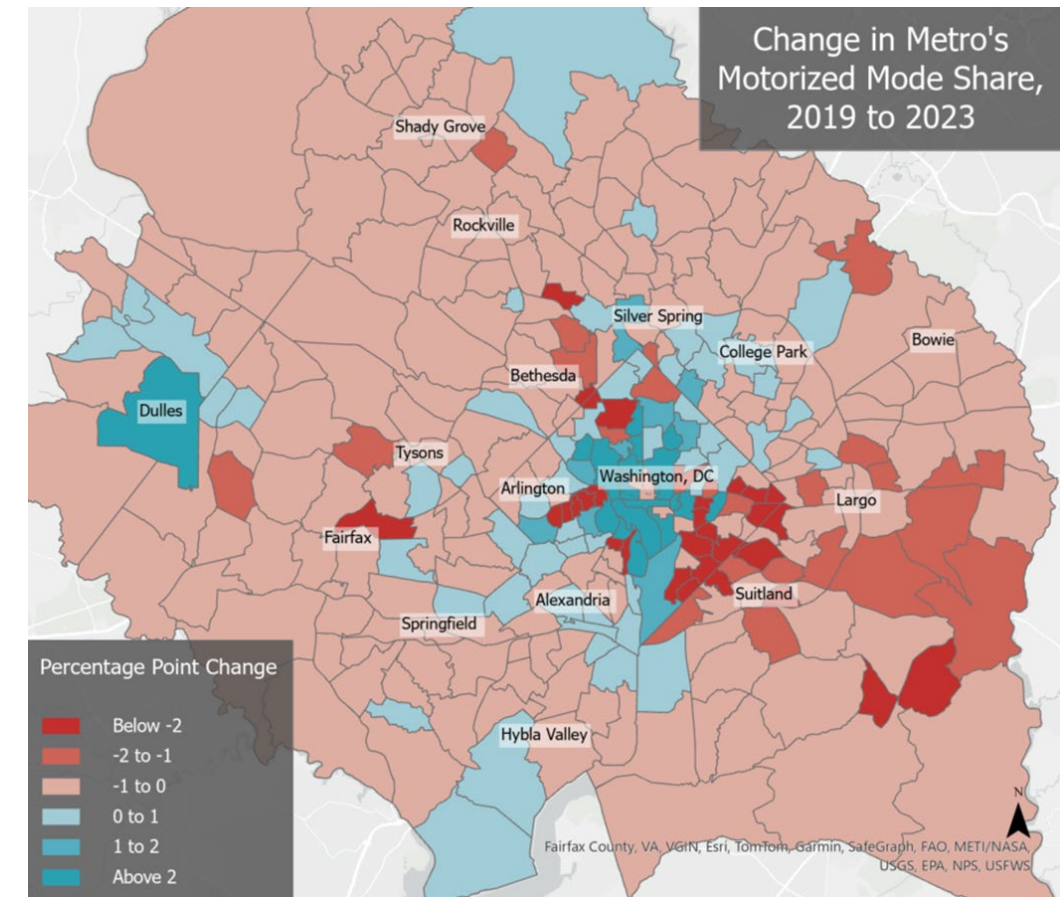
Percent of region's motorized trips taken on transit (Metrorail, Metrobus, or Regional Operators)



- 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

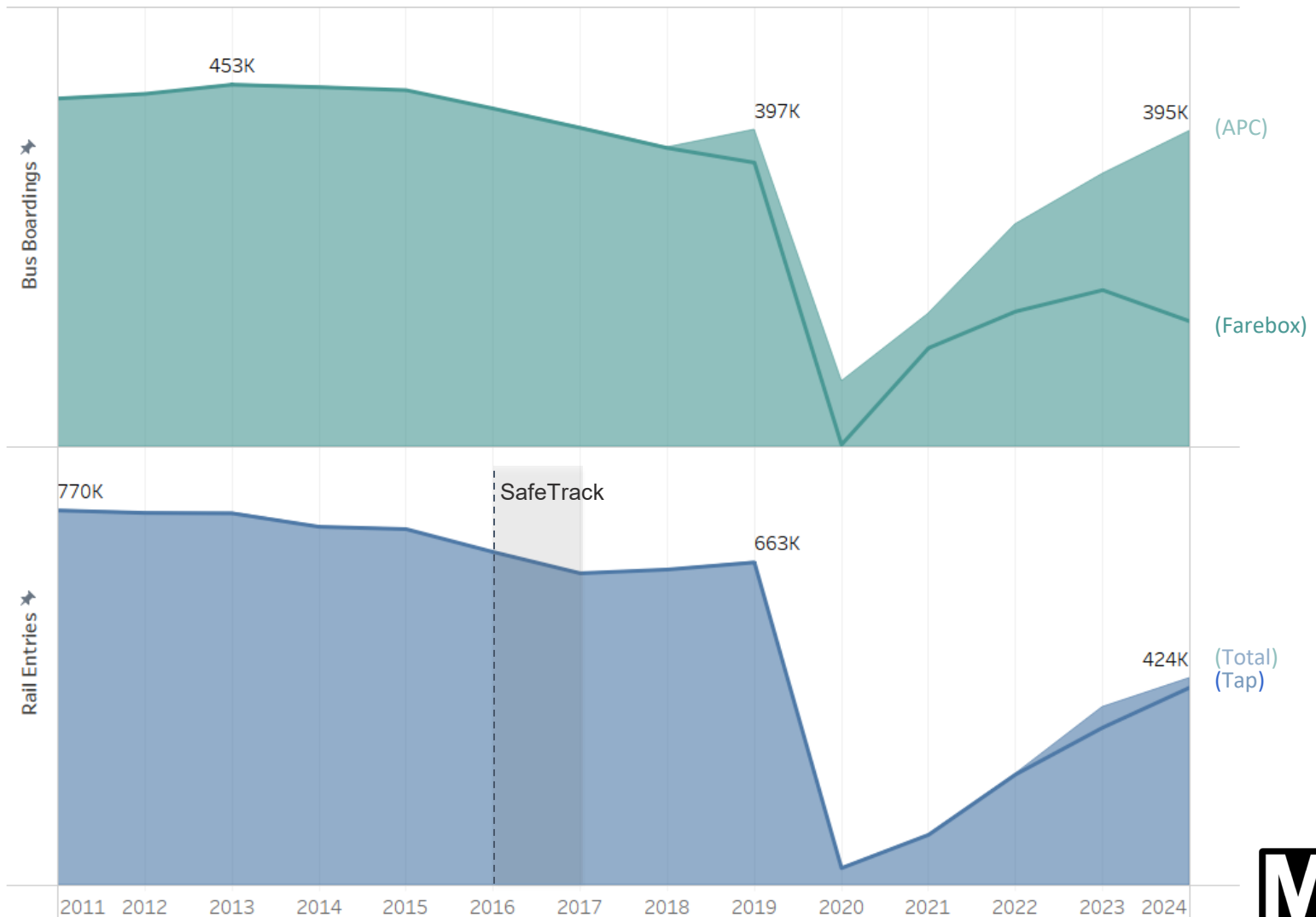




## Current service plan has accommodated 20% more riders this year and has capacity to serve more

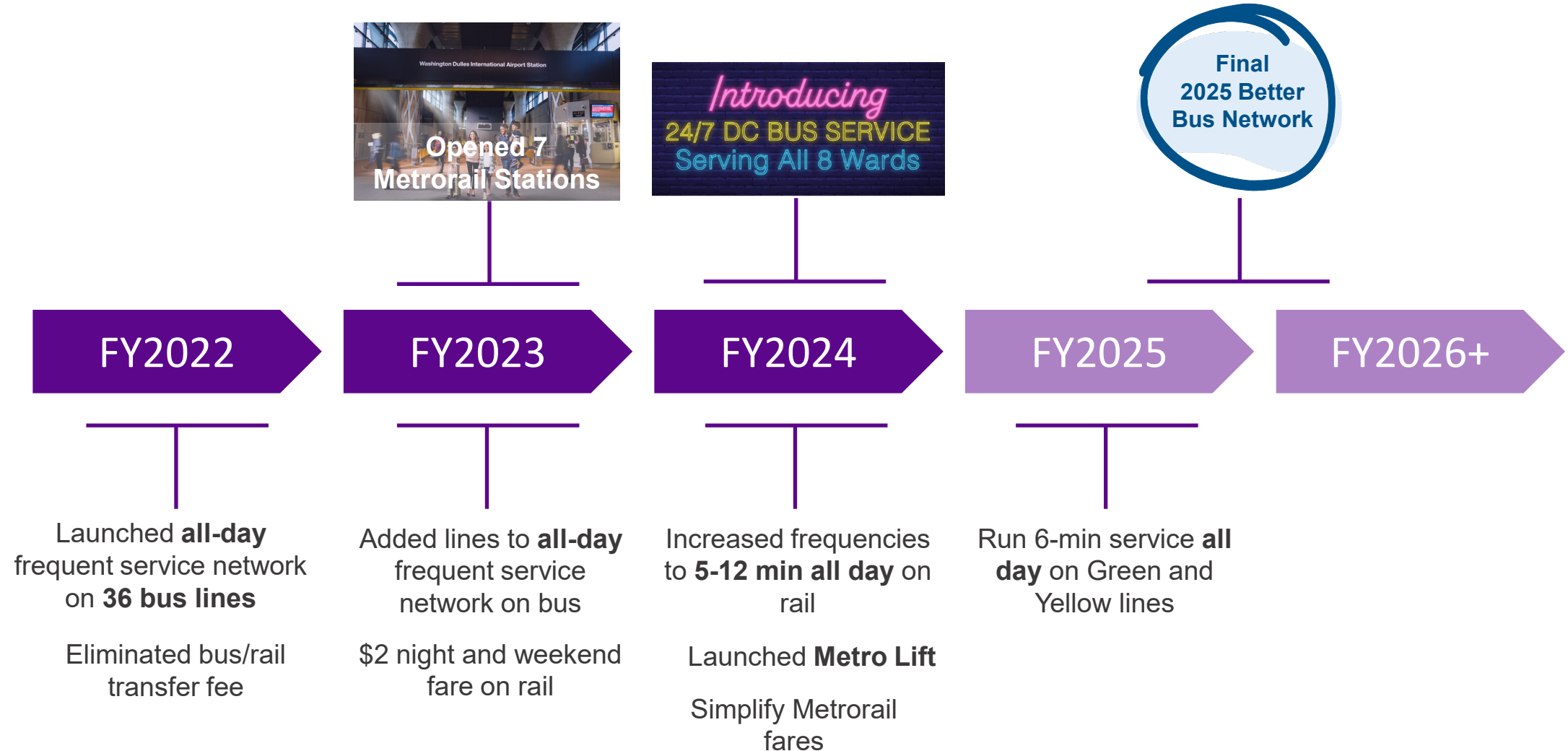
- Ridership peaked at 1.3 million average daily trips in 2012
- Metro has capacity to serve more riders with current resource levels:
  - Proposed 2025 Better Bus Network could attract **13,000 more daily weekday trips**
  - Current rail service plan could carry **33% more trips**

Average Weekday Ridership in April





## Future regional growth and prosperity requires continued transit investment

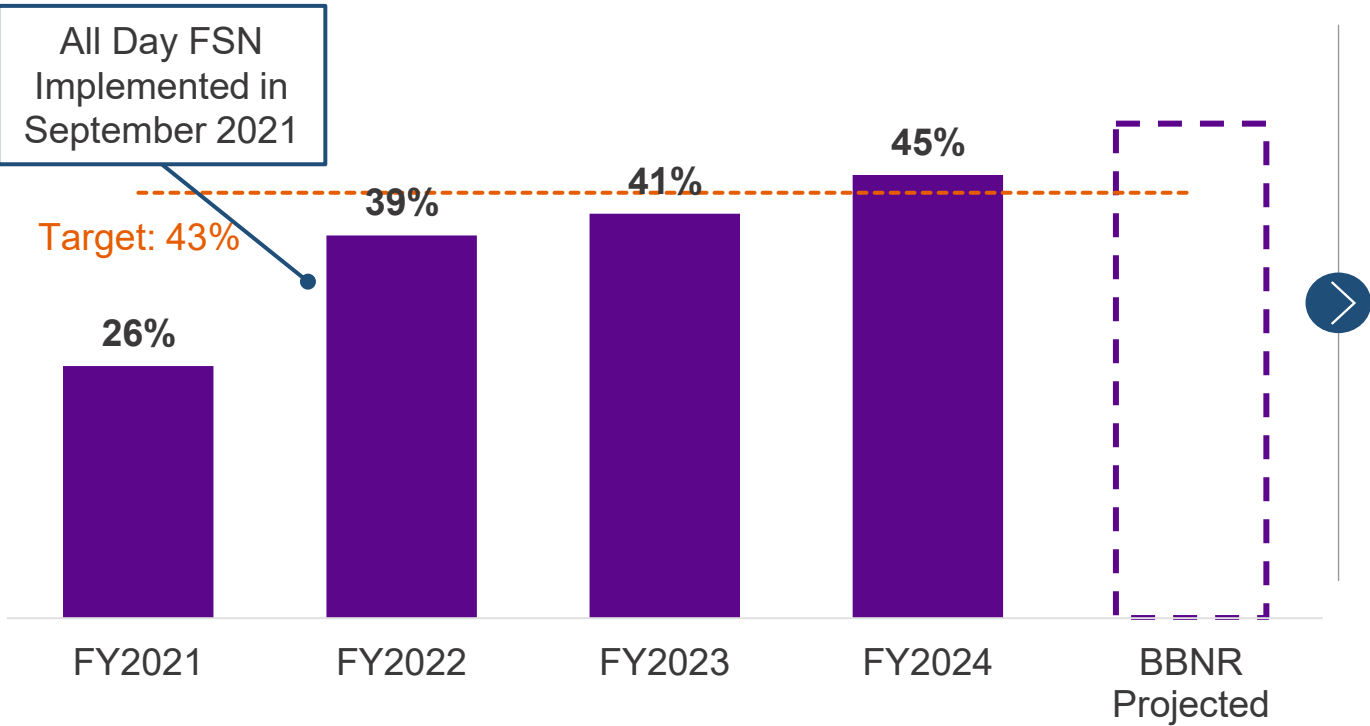




# Reallocating existing resources to the frequent service network almost doubled share of bus customer trips with scheduled wait times of 12 min or less

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

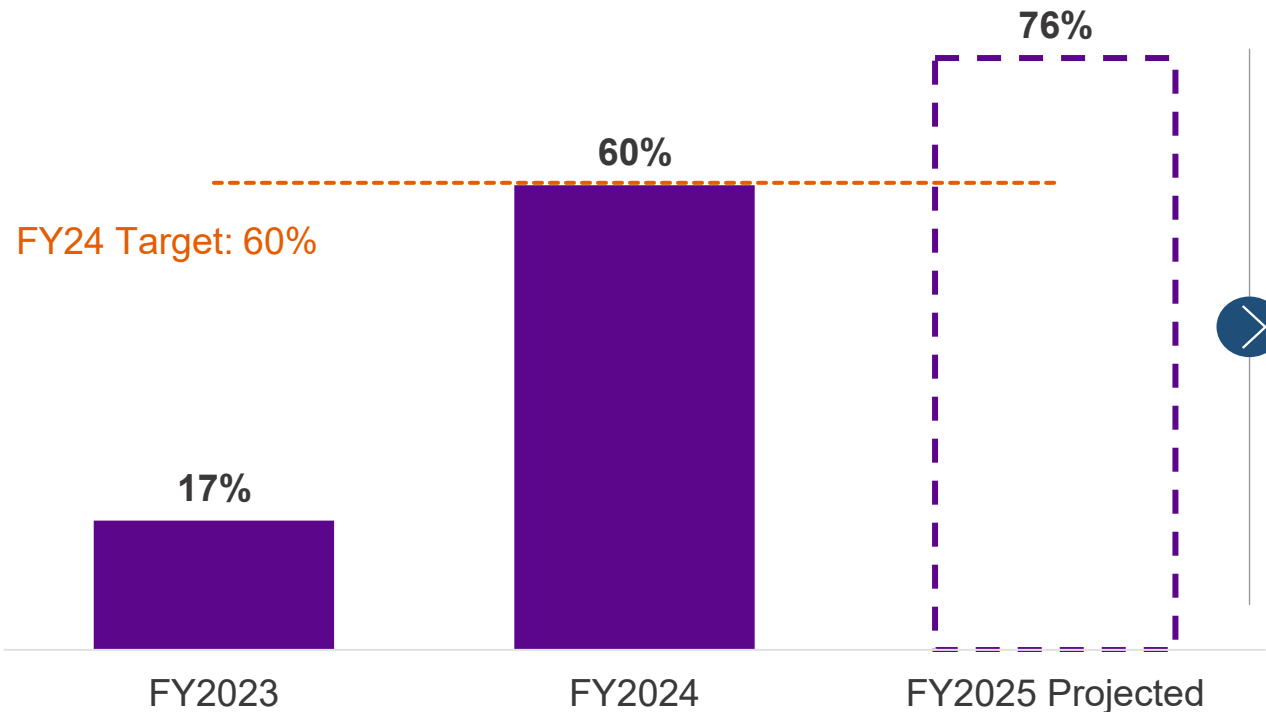




## Service optimization improved access to frequent rail service over last two years

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

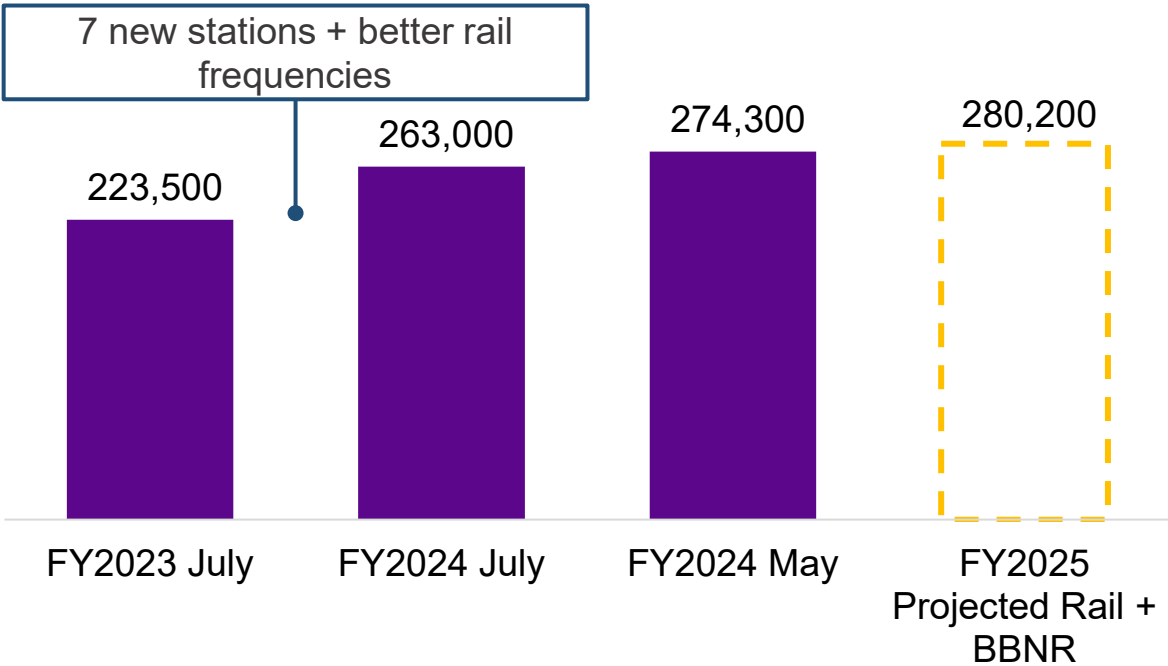




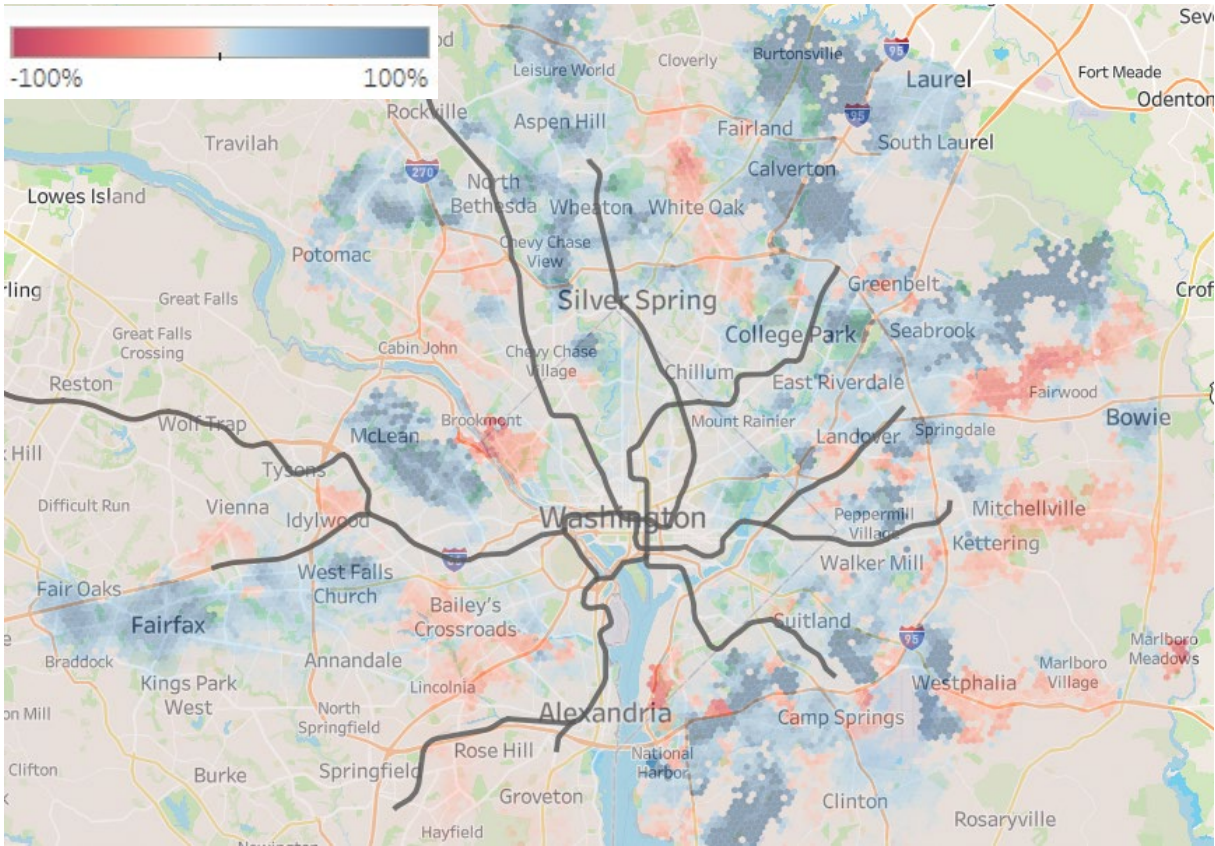
# Access to 50,000 more jobs due to new rail stations and increased bus and rail frequencies all-day, all week

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

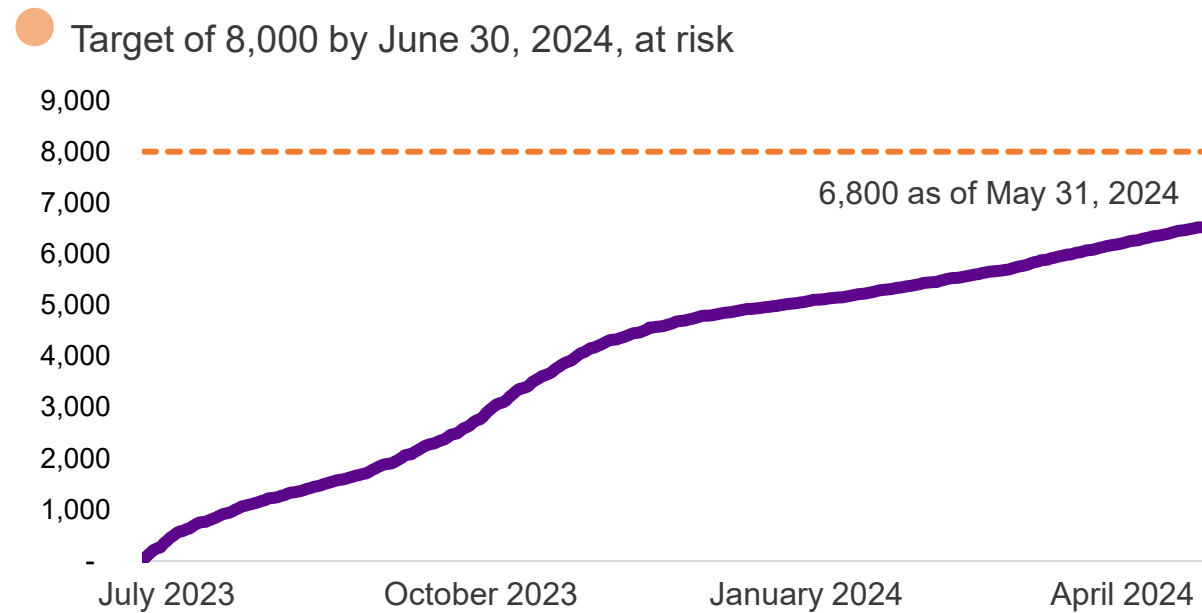
- Over 1 million bus and rail trips each weekend during Cherry Blossom season
- Nationals games led to record weekend ridership at Navy Yard in April
- More weekends over 1 million combined trips in 2024 than 2019





## 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.



### 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



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





## Community Engagement: Building the Team and Expanding Current Practices

**Established new  
Community Relations  
& Outreach office**



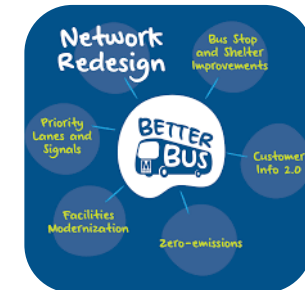
**Listening to  
community feedback  
to develop campaigns**



**Amplifying best  
practices**



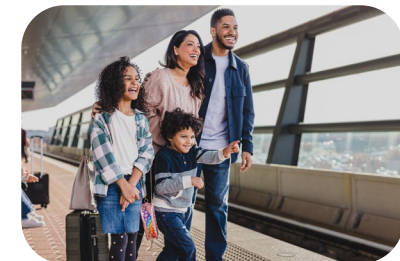
**Expanding our  
community network**



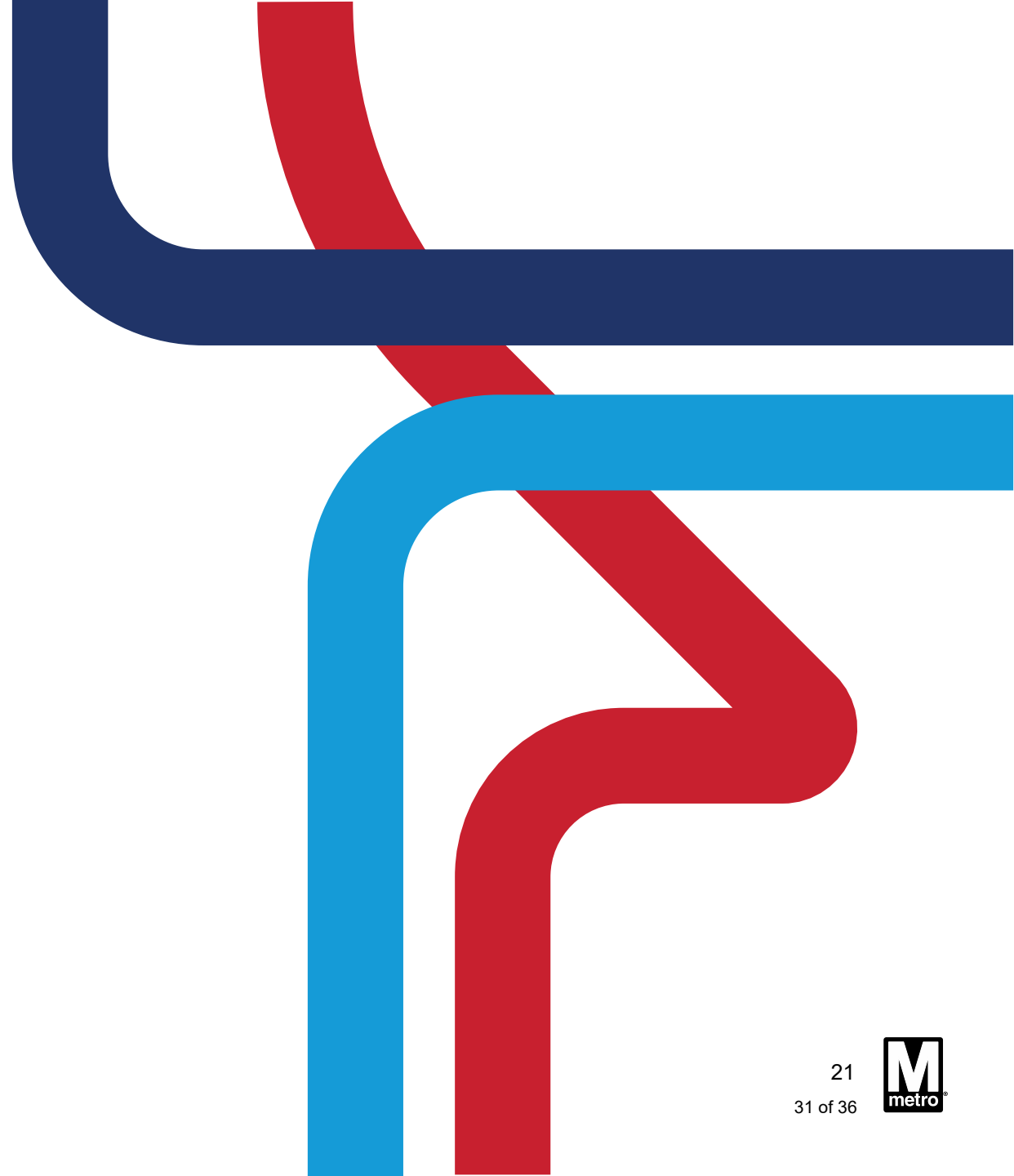
**Innovative  
opportunities to  
provide feedback**



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







## 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

