



TO: Chairman McKay and NVTC Commissioners

FROM: Kate Mattice, Andrew D'huyvetter and Nobuhiko Daito

DATE: August 30, 2017

SUBJECT: NVTC FY2017 Annual Ridership Report

Overall transit ridership in Northern Virginia was down 9.0 percent between FY2016 and FY2017. This decline primarily reflected service impacts related to WMATA's SafeTrack program, an accelerated track work plan to address safety recommendations and rehabilitate the Metrorail system. SafeTrack related service disruptions to Northern Virginia transit providers showed mixed effects on ridership. Since nearly two-thirds of bus trips in Northern Virginia connect to Metrorail, most agencies saw declines in bus ridership that were related to declines in rail ridership. While most agencies saw ridership declines, VRE and ART saw ridership increases that were partially due to their use as alternative travel during the SafeTrack surges. While difficult to measure, there are also larger national trends at work that impact transit ridership including gas prices, teleworking, and transportation network companies (Uber, Lyft, etc.).

Ridership in Virginia by System			
FY2017			
System	FY2016	FY2017	Percent Change FY2016-FY2017
Arlington Transit (ART)	3,136,514	3,422,208	+9.1%
Alexandria DASH	4,160,094	3,897,696	-6.3%
Fairfax County Connector	8,984,792	8,631,906	-3.9%
Fairfax City CUE	678,967	645,687	-4.9%
Loudoun County Transit (LCT)	1,761,715	1,755,100	-0.4%
PRTC Omni Ride & Omni Link	2,805,181	2,570,127	-8.4%
Virginia Railway Express (VRE)	4,352,814	4,676,123	+7.4%
Metrobus (Virginia only)	19,997,471	19,124,426	-4.4%
Metrorail (Virginia only)	101,604,032	89,497,280	-11.9%
Total	147,481,580	134,220,553	-9.0%

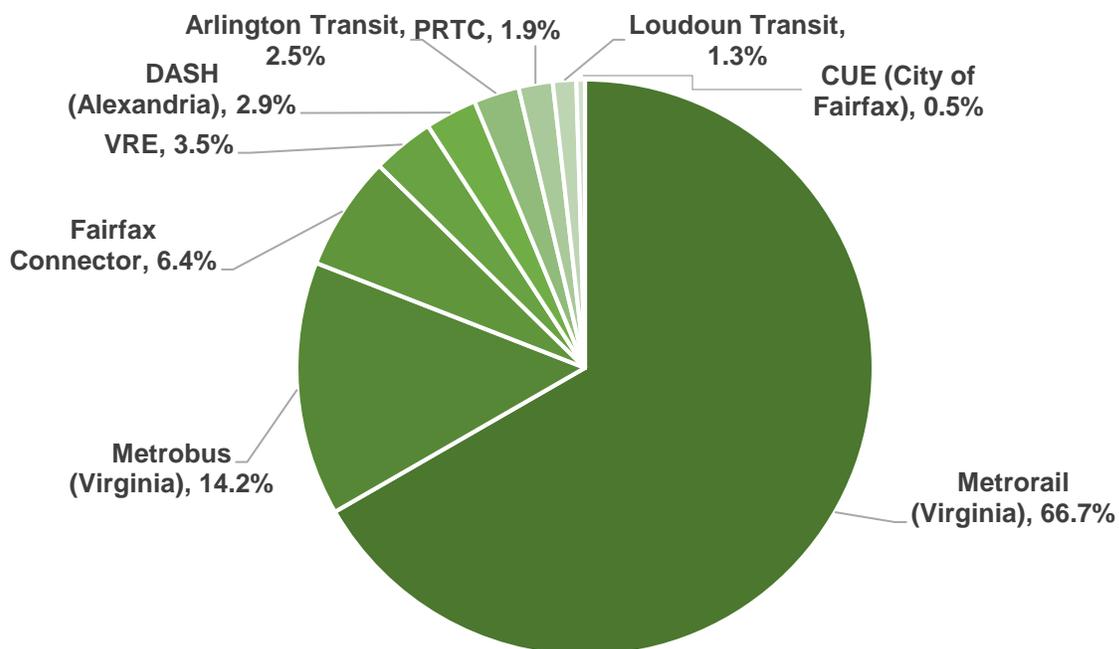
Source: WMATA, NVTC, and local and regional transit providers. Ridership is in unlinked passenger trips.

This report provides FY2016 and FY2017 ridership statistics from Northern Virginia transit providers. This annual report focuses on ridership statistics (unlinked passenger trips) and will be complemented by additional transit ridership and performance reports as ridership statistics are available. FY2017 ridership numbers are preliminary and may change with additional reporting to the National Transit Database.

FY2017 was notable for containing most of WMATA's [SafeTrack program](#), an accelerated track work plan to address safety recommendations and rehabilitate the Metrorail system. The first surge started on June 4, 2016 and the last surge ended on June 25, 2017. While varying with each SafeTrack surge, SafeTrack often resulted in reduced Metrorail service in Northern Virginia. For FY2016, SafeTrack reduced Metrorail service in Virginia for 26 days (7.1 percent of the Fiscal Year). For FY2017, SafeTrack reduced Metrorail service in Virginia for 229 days (62.7 percent of the fiscal year).

In FY2017, Metrorail and Metrobus continued to have the most transit trips in Northern Virginia, with 66.7 percent and 14.2 percent of total trips, respectively (Figure 1). The transit provider with the next highest ridership was the Fairfax Connector.

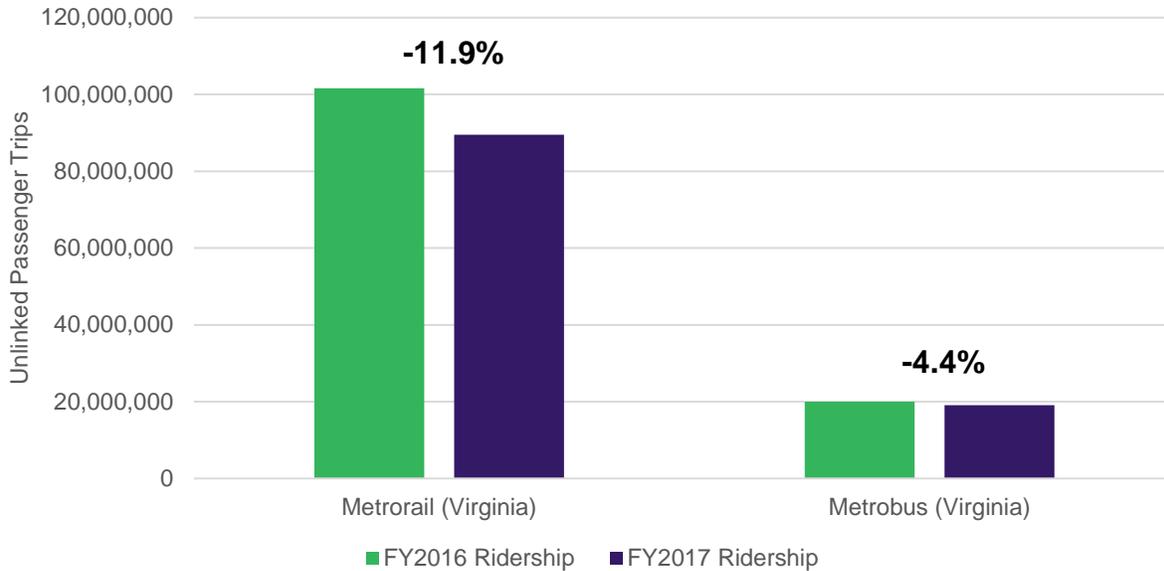
Figure 1: FY2017 Transit Ridership in Northern Virginia by Transit Provider



Source: WMATA and Jurisdictional Transit Providers.

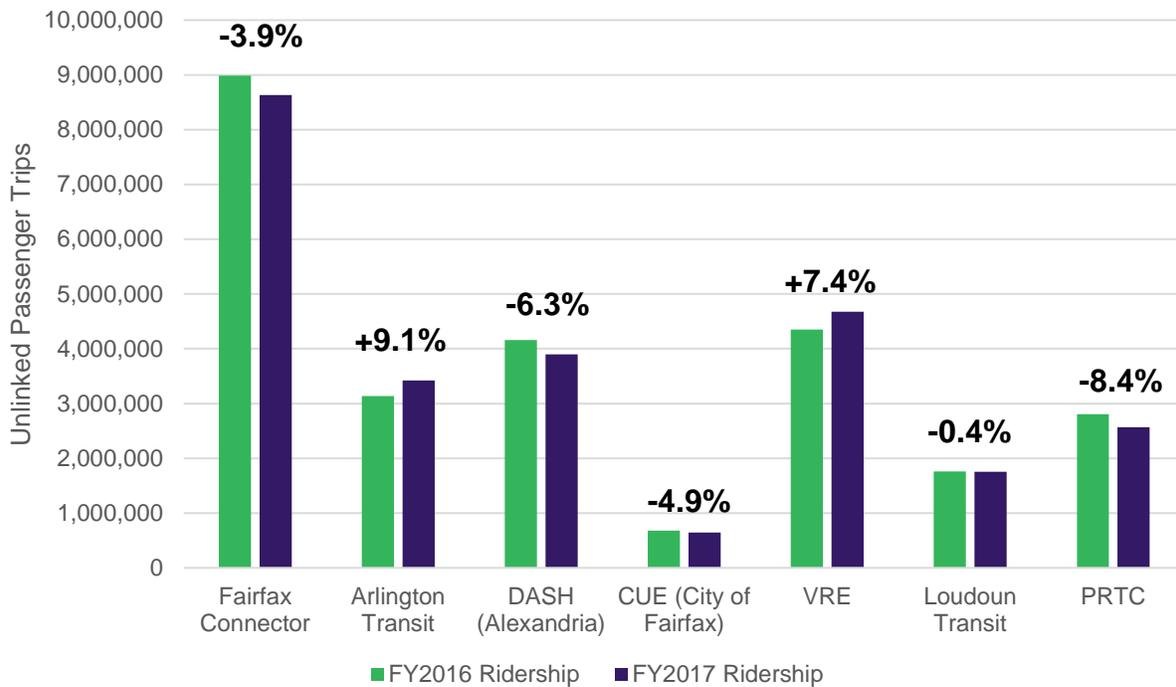
Overall, total transit ridership in Northern Virginia was down by 9.0 percent. Almost all transit providers showed ridership losses in FY2017 when compared to FY2016 (Figures 2 and 3). The two transit providers that showed ridership increases were Arlington Transit and the Virginia Railway Express. Ridership losses are generally attributable to larger trends like low gas prices and an increase in teleworking. Equally importantly, many local transit providers in Northern Virginia provide feeder service to the Metrorail system, so decreases in Metrorail ridership are often tied to decreases in local transit ridership.

Figure 2: Metrorail and Metrobus Northern Virginia Ridership, FY2016-FY2017.



Source: WMATA and NVTC Calculations.

Figure 3: Northern Virginia Transit Provider Ridership, FY2016-FY2017.



Source: Northern Virginia Transit Providers.

The following constitutes a compilation of trends information provided through narrative summaries to NVTC by some of Northern Virginia's regional transit service providers. Providers expressed that the information is often anecdotal and based on a varying degree of analysis, and that the factors noted are not a complete list of factors influencing ridership.

Metrorail

Metrorail ridership in Northern Virginia declined 11.9 percent in between FY2016 and FY2017. Much of the ridership loss is due to service impacts in Northern Virginia due to SafeTrack as well as customer concerns over service quality and reliability. The vast majority of SafeTrack surges were in FY2017 with approximately 63 percent of days of the Fiscal Year having service impacts in Virginia.

Additional longer term trends are also present in FY2017. From CY2011 to CY2017, average weekday passenger trips decreased an average of 17,800 annually, about 2.5 percent a year. Various factors contributed to ridership losses, including the use of alternative modes of transportation, telework, lifestyle, federal employment, price sensitivity, gas prices, and other factors. Of the ridership loss between 2013 and 2016, WMATA estimates that at least 30 percent of the loss is due primarily to declines in reliability. WMATA's customer research found that most of the customer loss occurred in the months just before SafeTrack, and that SafeTrack likely resulted in an additional five percent of customers leaving. WMATA has found that 80 percent or more of those riders were coming back for at least some of their trips.

Additionally, evidence suggests that frequent customers are not leaving at higher rates but are taking fewer trips. Teleworking and alternative work schedules are contributing to the decrease in passenger trips at an unanticipated rate. WMATA has found that approximately 39 percent of Metrorail customers telework each month for average of eight days.

The heaviest losses in 2016 and 2017 have been off-peak, particularly on the evenings and weekends. In general, for the last 18 months, peak ridership has been down five percent, off-peak weekday ridership has been down 10 percent, and weekend ridership has seen at least a 10-20 percent drop depending on track work.

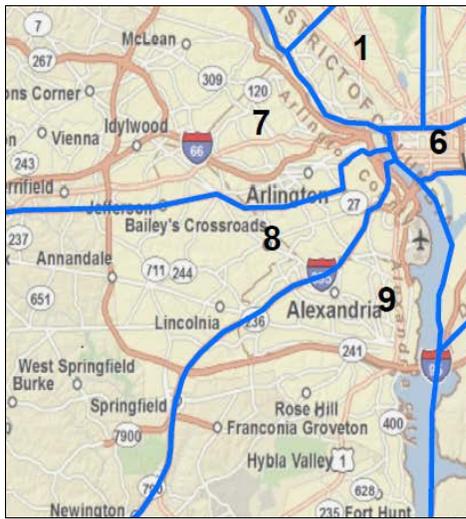
While FY2017 showed significant declines in ridership due to SafeTrack, the conclusion of SafeTrack on June 25th and efforts to increase reliability as part of Back2Good have yielded some positive indicators. The five highest weekday ridership days of the year for the entire system were June 13, 14, 27, 28, and 29. Tuesday, June 27th, was the highest weekday ridership of the year.

WMATA anticipates additional information on FY2017 ridership trends in its upcoming FY2017 financial update.

Metrobus

In Virginia, Metrobus ridership declined 4.4 percent between FY2016 and FY2017. This decline, however, was not consistent across Metrobus planning sectors in Northern Virginia. Of the three bus planning sectors in Virginia, Western NOVA is down by 7.4 percent, while Central NOVA is down 4.1 percent and Eastern NOVA is down 2.8 percent. Western lines are more likely to be feeders to rail and strong growth was seen on some of the Eastern lines, particularly on the Metroway. The Eastern sector (and to a lesser extent the Central sector) lines also absorbed a fair amount of ridership diverted from SafeTrack work zones, which moderated the downward trend.

Figure 4: WMATA Service Sectors in Northern Virginia

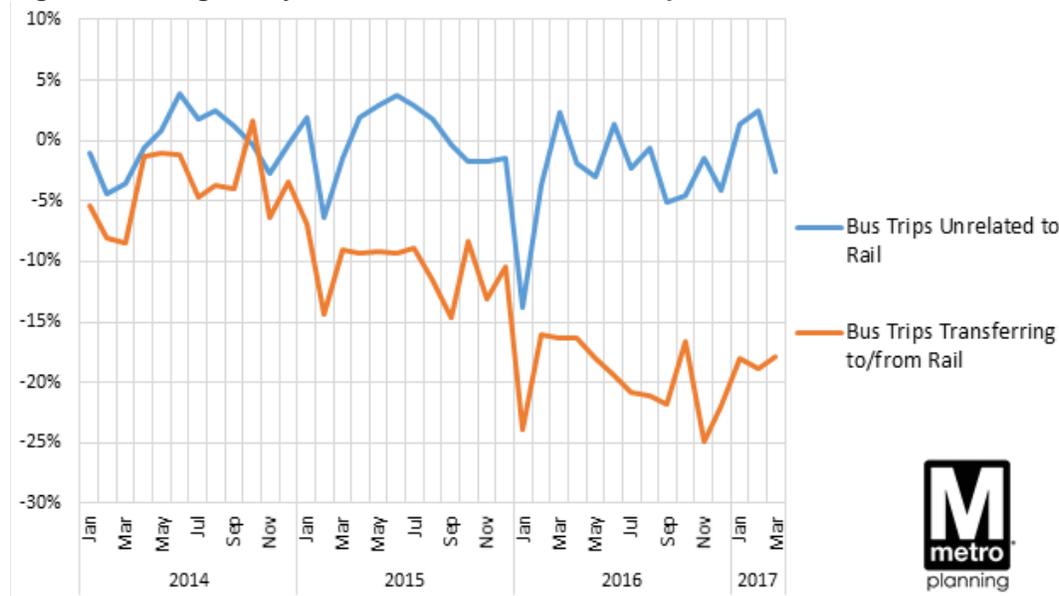


Sector	Name
7	Western NOVA
8	Central NOVA
9	Eastern NOVA

Source: WMATA Bus Planning.

Systemwide, WMATA has found that declines in bus ridership are significantly, though not entirely, rail-related. Metrobus trips that are transferring to/from Metrorail have declined at a greater rate than standalone trips (Figure 5).

Figure 5: Change in System wide Metrobus Ridership since 2013



Source: WMATA Bus Planning.



SafeTrack was also a big factor for western NOVA due to the length of time for surges 1,5 and 9. Surge 13 also impacted ridership in the Shirley Highway and US 1 corridors. Finally, all the weekend work not counted as SafeTrack this summer reduced ridership.

Bus ridership has also affected by various factors that impact rail: declining regional travel of all kinds, telework, low gas prices, the growth of transportation network companies (TNCs), etc. Transit agencies are seeing falling bus ridership nationally, and Metrobus is not immune to these larger trends.

ART

Arlington Transit (ART) ridership grew 9.1 percent from FY2016 to 3,422,208 boardings in FY2017. This growth is primarily attributed to two routes with improved services that also were affected by SafeTrack. The ART 55 replaced Metrobus 3A service in December, 2015, half-way through FY2016. With enhanced off-peak frequencies, the ART 55 is responsible for over half of the systemwide increase. Some of these new rides were in response to Orange/Silver Line disruptions related to SafeTrack. The ART 43 Courthouse-Rosslyn-Crystal City service was doubled in peak service and gained midday, night and weekend trips at the beginning of FY2017. This enhancement was developed anticipating SafeTrack service disruptions on the Blue Line and is responsible for over 147,000 of the new rides. However, several other ART routes had fewer rides in FY2017 as compared to the previous year.

CUE

CUE ridership showed a 4.9 percent decline between FY2016 and FY2017. CUE ridership is heavily tied to Metrorail. SafeTrack related service reductions at the Vienna Metrorail Station are related to drops in ridership on CUE.

DASH

During FY2017 DASH experienced a 6.3 percent decline in ridership from FY2016. There were a number of factors that contributed to the decline, but the most influential was SafeTrack. This had a heavy impact on DASH's summer and fall ridership, while during the winter and spring seasons snow and rain storms also had an impact on ridership. Nationally there has been a declining ridership trend in the transit industry in numerous jurisdictions. Some of the softer impacts for the decline in ridership have been the rise in ridesharing platforms such as Uber and Lyft, and lower gas prices as compared to previous years.

Fairfax Connector

Between FY2017 and FY2016, the Fairfax Connector saw a decline in ridership of 4.1 percent. This overall change in ridership is consistent with larger ridership trends over the past few years. While ridership from the student pass program and the supplemental SafeTrack shuttles run by the Connector have added riders, average weekday ridership is down 5.19 percent. This reflects the impact of SafeTrack, which significantly impacted Metrorail ridership in the region during periods of reduced service and segment specific service suspensions associated with reconstruction of rail infrastructure, as well as storm related service disruptions.

Loudoun County Transit

FY2017 was an interesting and unpredictable year for transit ridership in Loudoun County. While overall ridership in Loudoun only declined 0.4 percent, there were significant changes and non-changes on the Metro Connection and Long Haul commuter bus services. The Metro Connection services experienced a decline of eight percent in ridership while the long-haul services remained flat from FY2016 to FY2017, despite a \$1.00 per trip fare increase. This is important to note because the last time the long-haul service had a \$1.00 fare increase (FY2014), ridership declined 10 percent. Staff believe that both the decrease in Metro Connection ridership and the lack of change to the long-haul ridership are the result of the SafeTrack program. Another interesting fact is that the Local Fixed Route services in Loudoun County saw a decline of one percent in ridership while the ADA/Paratransit services experienced an 11 percent increase in ridership. Staff attribute the growth in ADA/Paratransit ridership to a rise in awareness of those services.

PRTC

There were no appreciable increases or decreases to ridership related to WMATA's SafeTrack project. PRTC did alter schedules, particularly of later evening trips, at Tysons and Franconia-Springfield Metrorail stations during times of work impacting those lines to minimize impacts to our passengers. PRTC also promoted alternate OmniRide routes to utilize and PRTC's RideShare program that assists with vanpool and other carpool options to help mitigate any issues related to the project.

The changes in ridership from FY2016 to FY2017 were related to a major service reduction that took place in July 2016 on both OmniRide and OmniLink. More than 13 percent of service was reduced, either by eliminating trips, reducing Friday levels of service on OmniRide, eliminating segments of routes and whole route elimination. Fare increases of five percent, continued low fuel prices and the availability of alternate work schedules and telework also contributed to the decline in ridership between FY2016 and FY2017.

VRE

VRE saw an approximately 7.4 increase in ridership from FY2016 to FY2017. Average weekday ridership also increased from 17,666 in FY2016 to 18,968 in FY2017. It is believed much of that increase is a result of WMATA's SafeTrack initiative. When the SafeTrack surges affected lines that were directly parallel to the Fredericksburg and Manassas lines, WMATA's Blue, Yellow, or Orange Lines, VRE ridership significantly increased. Overall, month to month comparisons between FY2017 and FY2016 were consistently higher in FY2017 and went as high as an 1,800 rider increase in September. VRE did not alter its schedule during the SafeTrack surges, but VRE was heavily promoted as an alternative mode on the VRE website and Facebook ads that targeted demographics affected by the surges. In July 2016, when a portion of Blue and Yellow Lines' tracks were shut down, VRE staff were present at the Franconia/Springfield and Alexandria VRE stations during the morning commute to assist and educate new riders using VRE. The comments received from those riders stated they enjoyed the clean trains and shorter travel time to DC. The only downside staff heard is VRE is more expensive than Metrorail.

A contributing factor to increased ridership is related to the monthly Federal transit benefit which increased to \$255/month in January 2016, the middle of fiscal year 2017. Historically VRE ridership has increased when the transit benefit amount has increased, making VRE a more economically viable travel option. The FY2017 annual ridership of 4.8 million is the highest since FY2012, reversing a downward trend in ridership between FY2012 and FY2016. The prior year's declines are believed to be related to several factors including low gas prices, fare increases in FY2016 and FY2013, and increased prevalence of telework by VRE riders.

Overall, VRE riders are very satisfied with the service, with nearly 90% of riders rating the service quality as Excellent or Very Good in the 2016 Customer Opinion Survey. Additional information regarding rider satisfaction and other service trends is anticipated in fall 2017 when the results of the 2017 Customer Opinion Survey will be available.