Safety and Operations Committee

Information Item III-A

January 24, 2019

Bus Transformation Project Update

Washington Metropolitan Area Transit Authority

Board Action/Information Summary

○ Action ◉ Information	MEAD Number: 202059	Resolution: ○ Yes ◉ No

TITLE:

Bus Transformation Project Briefing

PRESENTATION SUMMARY:

Rob Puentes, Chair of the Bus Transformation Project's Executive Steering Committee, and Rich Davey, from the project's consultant team will brief the Board on the region's bus system today, actions undertaken in peer regions to improve bus service, the Bus Transformation Project's goals, objectives, timeline, deliverables, stakeholder engagement, and progress to date, and the main strategic considerations that will guide the project's strategy and ten-year action plan.

PURPOSE:

Provide an update to the Board on the Bus Transformation Project progress to date and the state of the region's bus system today.

DESCRIPTION:

In September, Metro and its partner jurisdictions and transit agencies launched the Bus Transformation Project with the goal to create a bold, new vision and a collaborative action plan for the future of bus in the region. The project will explore all factors that influence the quality of bus service, from technology and transit priority, to funding structures, coordination, and service provision roles. The Bus Transformation Project presents an opportunity to improve service for customers, develop clearer funding approaches, create expectations for transit agencies and jurisdictions who own and operate the roads, and transform organizations to be nimble in the face of a quickly changing mobility landscape.

Key Highlights:

- Bus ridership is declining across the region due to slow buses, increased competition, and system that is not built around the customer's needs and expectations.
- The current condition of the region's bus system exacerbates congestion, limits access to jobs, and increases the region's economic divide.
- The Bus Transformation Project was created to obtain regional consensus on a vision and collaborative action plan for the future of bus in the region and the role of Metrobus within the bus system.

- Peer cities and regions are facing similar challenges, though many have been successful in advancing improvements to service, on-street infrastructure, or governance that have led to ridership increases.
- In the project's public survey, conducted in the Fall 2018, respondents indicated that the top two barriers to riding the bus are infrequent service and slow bus speeds. Respondents prioritized improving the frequency of service and reliability of trips.
- The project is led by the Executive Steering Committee (ESC), which is comprised of recognized regional leaders who will guide the strategies' development and manage political risks.

Background and History:

Buses are an integral part of the National Capital Region's transportation system. Metro and the other local operators like ART, CUE, DASH, DC Circulator, Loudoun County Transit, Fairfax Connector, Ride On, and TheBus affordably connect residents to jobs, school, and other aspects of daily life. However, traffic is increasing and bus speeds are declining, leading to longer travel times and unreliability in getting to a destination. Customer expectations have changed and there is increased competition for fewer passengers. Government budgets are under pressure to do more with less. Bus's market share is eroding as competition becomes more plentiful and, in some cases, more affordable. The allure of new technology, such as autonomous cars, distracts from the fact that driverless cars and transportation network companies (TNCs), including Uber and Lyft, won't solve the region's mobility problem without defying the laws of physics and geometry. Empirical research points to the likelihood that the new options will make current problems worse.

Tactical, short-term solutions won't solve the problem – the reasons why buses aren't as successful as they could be in the region point to key structural, organizational, and business model issues. The solutions are owned equally by all bus operators and the cities, counties, and states that operate the roads. The Bus Transformation Project seeks to gain regional consensus on the following key strategic considerations:

- The role of Bus (multi-passenger publicly available vehicles) in the region.
- The level of regional commitment to speeding up bus.
- The regional governance / delivery model for bus.
- The business(es) that Metrobus should be in.
- Parameters around what Metrobus should operate
- Parameters around how Metrobus should operate

Discussion:

Metro, along with the region's local bus providers like ART, CUE, DASH, DC Circulator, Fairfax Connector, Loudoun County Transit, Ride On, and TheBus, launched the Bus Transformation Project in the summer of 2018. [1] Buses are an integral part of the region's transportation network, and non-commuter bus services carry 621,000 trips per day and reaching 81 percent of the region's residents (within the Compact). 51% of the trips occur at times outside the typical commute periods. The region's bus system is a stand-alone system - that is, 85% of Metrobus trips do not involve a transfer to or from Metrorail on an average weekday. About half of Metrobus customers are low income, 55 percent live in zero-car households, and 51 percent of customers live in the District, with 33 percent in Maryland and the remaining 16 percent in Virginia. This distribution differs from the National Capital Region's residents and Metrorail customers.

On an average weekday, the aforementioned operators operate over 520 bus routes with more than 2,500 buses in their fleet. Each provider operates a variety of services from corridor service to special service to general local bus service that circulates through neighborhoods or feeds Metrorail stations. Over $865 million is spent on bus operations in the region annually, based on 2016 and 2017 National Transit Database data. However, as noted in the 2018 Regional Bus Service Provision Study by the Transportation Planning Board, there is a significant variation in how operators attribute operating, maintenance, and capital costs to provide bus service, which makes a straight comparison between providers difficult.
All of Metrobus' routes are defined as either 'regional' or 'non-regional' and this drives the funding and service decisions around Metrobus service. The definitions were developed as part of the 1997 Blue Ribbon Mobility Panel. 'Regional' routes are those that either provide an inter-jurisdictional connection or meet at least two of the following: serves at least one regional activity center, travels a considerable distance on arterial roads, or achieves cost efficiency. Regional routes are funded jointly by jurisdictions. 'Non-regional' routes are any routes that do not meet the above criterial. These routes are owned and funded by specific jurisdictions.

Our region and mobility options continue to evolve, with new technologies and new modes appearing every year, while the bus system has largely stayed the same. Buses are slow and getting slower, due to increased congestion, lax enforcement, and increased demands on limited road space. Between 2008-2018, Metrobus speeds declined by nine percent, which has led to an increase cost of $30 million due to bus speed declines alone. This is an issue that all operators are facing. Costs are also growing due to increasing personnel costs and the high percentage of time and miles spent on deadheading between revenue service and bus garage locations. Bus ridership is decreasing as customers have more options that better meet their needs and expectations. From 2012 through 2017, bus ridership in the region declined by 13 percent. This combination of increasing costs and decreasing ridership has increased

pressure on the bus operating model – for all operators and jurisdictions. In Metrobus' case, operating loss has grown by 3.6 percent per year since 2013, which means that meeting the three percent cap on operating subsidy growth will require substantial changes to the operating model along with the processes and procedures that underpin the model. The challenges faced by Metrobus and the other local operators must be addressed collaboratively and equally. The challenges are not a WMATA problem alone, but a regional one owned equally with the jurisdictions who own the streets and operate local bus service. Making buses work better for the region presents the opportunity to derive maximum value from our roads, improve access to reliable, convenient transit, and speed up travel for residents. Transforming the bus system will require changes to governance, funding structure, and political priorities.

The challenges addressed in the Bus Transformation Project are not unique to the National Capital Region. Many cities and regions are reassessing their bus system, committing to fund and prioritize buses, and making bold decisions that make bus a mode of choice. Portland, Seattle, London, and the Bay Area have made significant strides in improving bus service through a variety of mechanisms such as transit signal priority, dedicated lanes, expanding service, a strong regional governance structure, and road pricing.

The Bus Transformation Project will develop a bold strategy for regional mobility on the region's roads that advances innovation, increases economic competitiveness, and plans for the future. The strategy will also define the role of bus in the region and identify how Metrobus, as the regional provider, best fits within the myriad of local operators. The vision is that 'Bus will be the mode of choice on the region's roads by 2030, serving as the backbone of a strong and inclusive regional mobility system.' Goals include regional connectivity, rider experience, financial stewardship, sustainable economic health and access to opportunity, and equity. The output for the project is a set of strategies with a clear roadmap, with roles and responsibilities for implementation. Analysis is underway to answer the following five strategic questions:

- What is the role of bus in the region?
- What services should Metrobus operate?
- What is the regional commitment to bus?
- What regional business functions should WMATA provide?
- What regional structures are needed to best support regional coordination and rider experience?

Stakeholder engagement has been a key piece of the project from its launch. The project is led by the Executive Steering Committee (ESC), which is comprised of recognized regional leaders who will guide the strategies' development and manage political risks. Additional stakeholder groups include a Strategic Advisory Panel, comprised of transit agencies, transportation agencies, advocates, community organizations, and riders; a Technical Team,

comprised of subject matter experts from Metro and the jurisdictions and transit agencies; and the WMATA Leadership Team, comprised of decision makers who manage the organization and its operations. The ESC is currently briefing county and city elected officials on the project to date. Additional stakeholder engagement that has occurred to date includes:

- 5,679 responses to a public survey on travel choices and priorities for future investments.
- 20 pop-up events across the region to gather public input
- 40 stakeholder interviews were conducted over the summer with jurisdictions, transit agencies, and regional transportation organizations.
- 13 Metrobus Division meetings to gather input from front line operations and maintenance staff
- 3 Focus Groups
- 6 Executive Steering Committee Meetings
- 3 Technical Team Meetings
- 1 Strategy Advisory Panel Meeting
- 3 External Project Briefings
- 5 WMATA Leadership Team Briefings
- 5 Other Meetings and Workshops
- 93 posting on social media by 10 different agencies
- 69 people reached by postings on the project Facebook page

The public survey gathered input from across the region and incorporated comments from all demographic groups. Respondents noted that their top two barriers to riding the bus are low frequency and low speed. Respondents prioritized improved frequency and reliability more than longer hours. The top three choices for investment were largely consistent across the region and demographic groups. Frequent, occasional, and non-riders also had the same top three investment choices. Affordable fares were a slightly higher priority among low-income and non-white respondents, as well as frequent riders. Changes in bus reliability was cited approximately the same number of times for both people who ride more and less now, indicating that perceptions of bus reliability vary considerably.

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[1] This project does not include commuter bus routes operated by Loudoun County, Maryland Transit Administration.

FUNDING IMPACT:

This is an information item.

TIMELINE:

Previous Actions	

	May 2018: Consultant awarded contract for Bus Transformation Project September 2018: Kick-off Summit for all stakeholders November 2018: Completed first round of public engagement; Completed strategic considerations discussion with each
Anticipated actions after presentation	Winter-Spring 2019: Draft strategies developed Spring 2019: Align on final strategies Summer-Fall 2019: Develop roadmap for implementation

RECOMMENDATION:

This is an information item. No Board actions recommended.

BUS TRANSFORMATION PROJECT

Briefing to Safety and Operations Committee

January 24, 2019

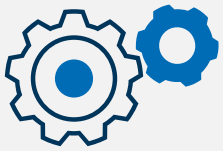
WASHINGTON AREA BUS TRANSFORMATION PROJECT

Objectives for today's session

- Provide overview and background on bus in the region
- Give an overview of the Project
  - Governance and timeline
  - Project Goals
  - Stakeholder engagement
- Highlight Strategic Choices
- Outline Next Steps

Overview of Bus in the Region

Bus is an integral part of the region's transportation network



Most **efficient** surface transportation

Reduces roadway **congestion**

Provides **access** to places across region

Affordable mobility option

Reduces vehicle **emissions**

Who's on the bus?

Almost half
of Metrobus customers are
Low-Income

55%
of Metrobus customers have
no vehicle at home

Metrobus customers live:
51% in DC
33% in MD
16% in VA

Source: WMATA 2014 Passenger Survey; US Census 2011-2016 5-Year Estimates
*Low income defined as living in a household with income less than $30,000 a year
** Includes portions of Maryland and Virginia within the WMATA Compact. Other locations excluded.

Riders use bus independent of rail

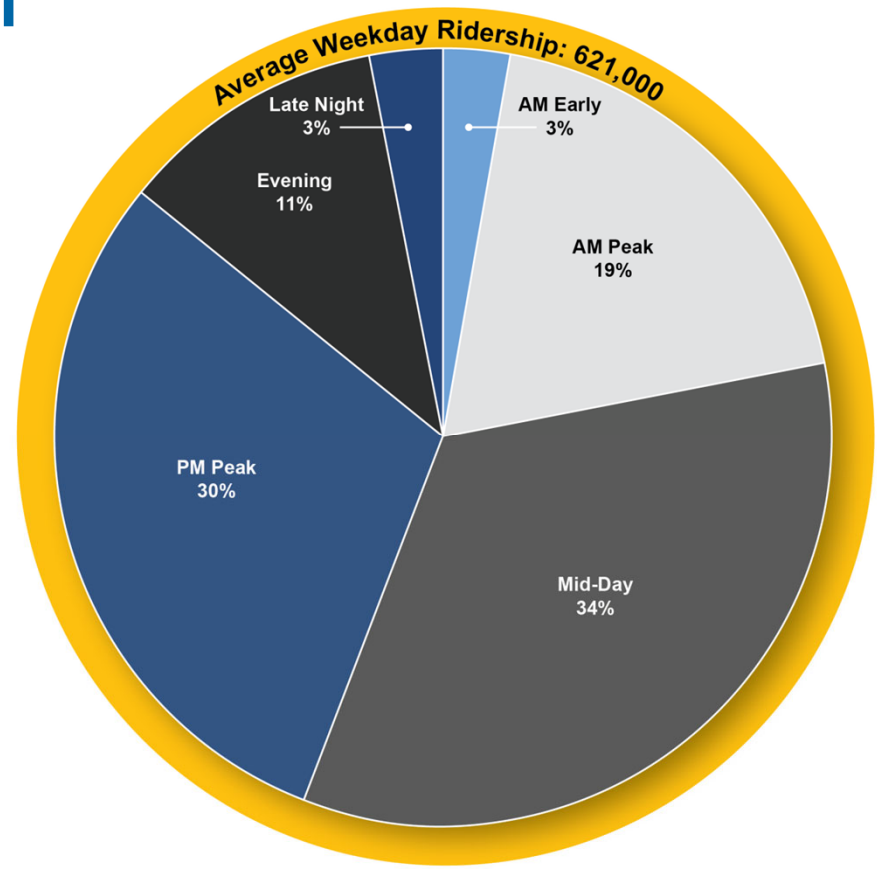
85%

of bus customers use bus to their final destinations; they do not transfer to rail.

51%

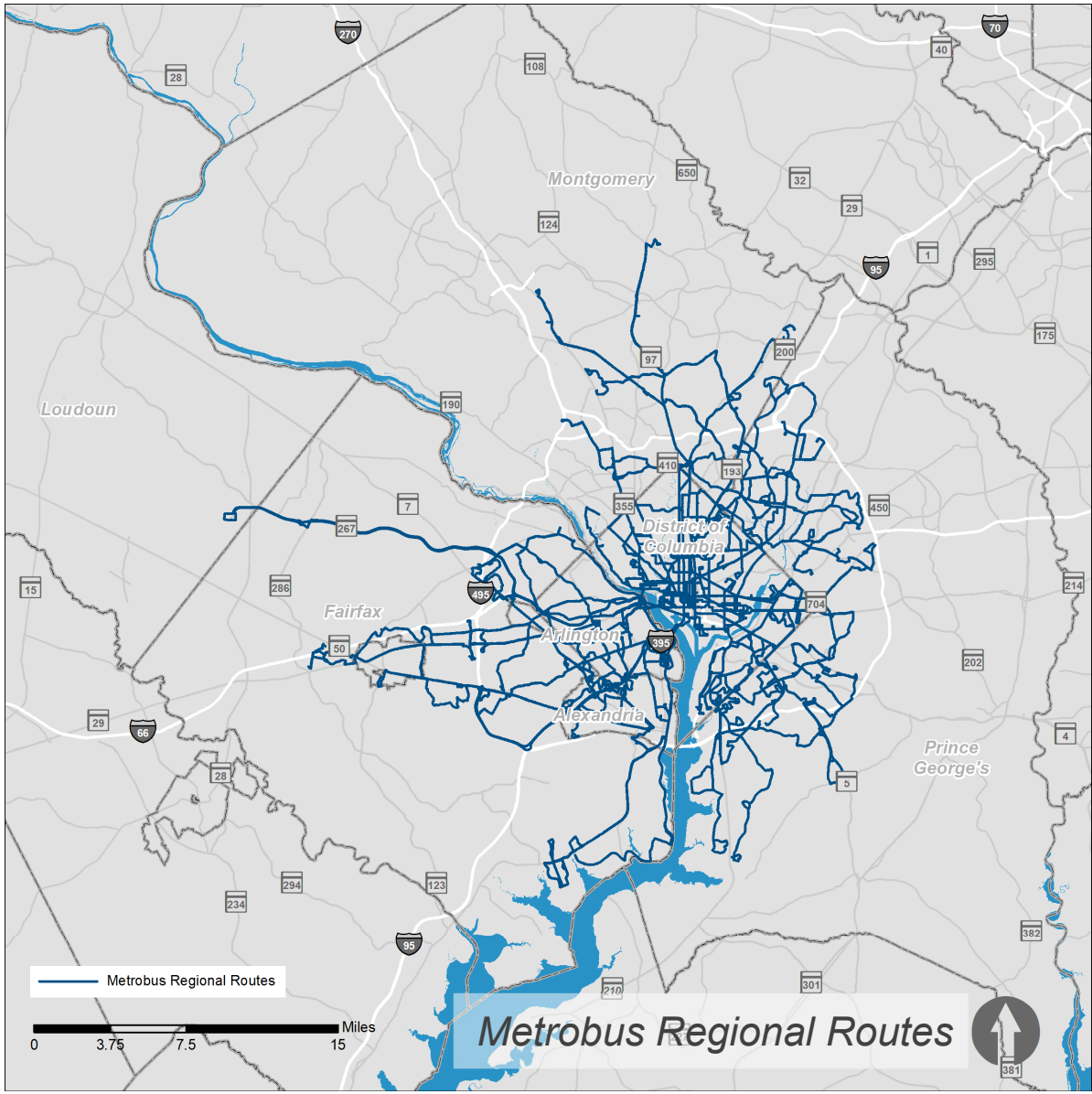
of bus customers use bus at times outside of typical peak commuting periods (6-9am and 3-7pm).

Metrorail ridership patterns have strong peaks during typical commute times; bus ridership is more consistent throughout the day.

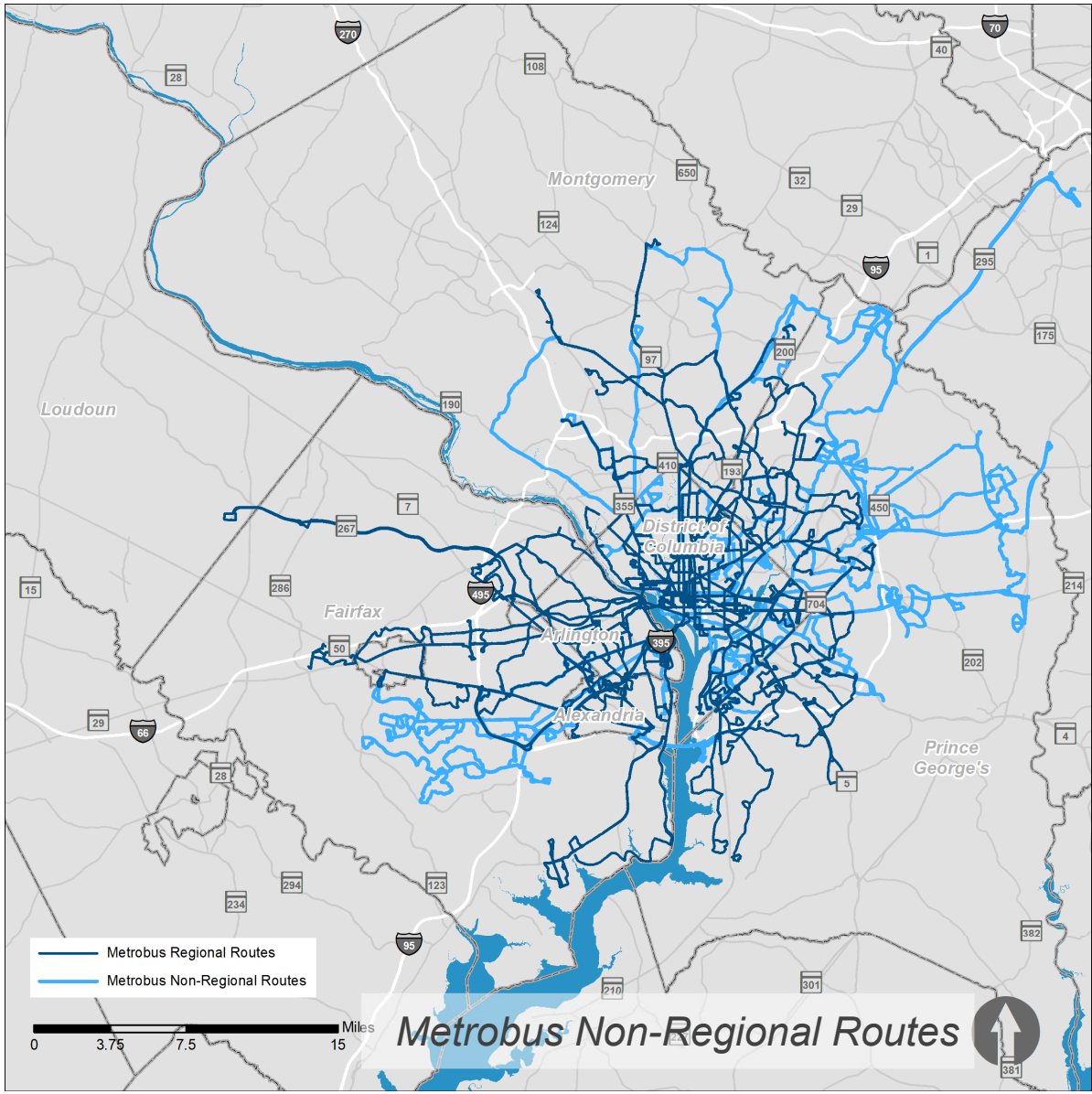


Source: 2017 Trace model data based on passenger counts

Metrobus Regional Routes

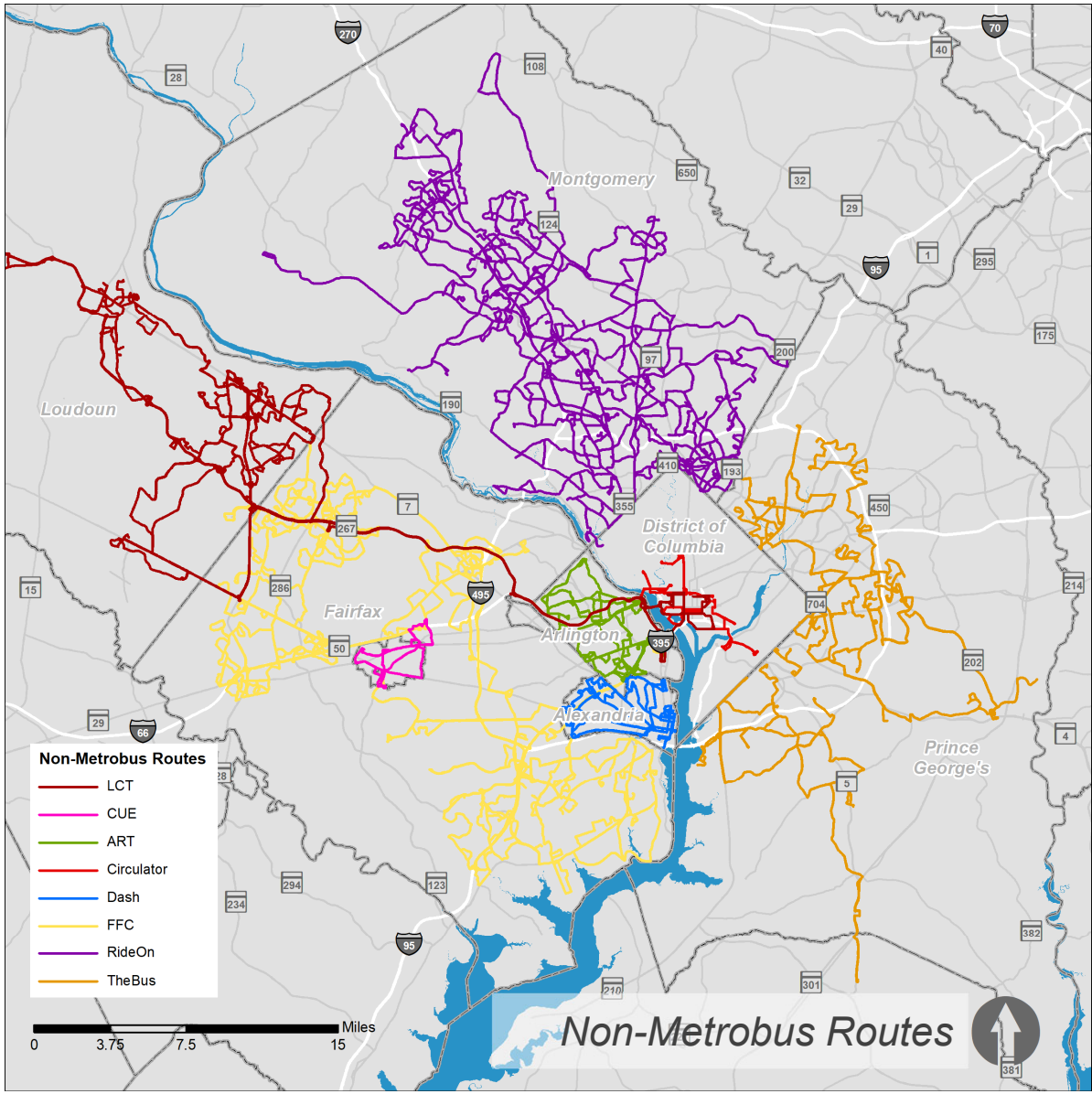


Metrobus Regional and Non-Regional Routes



Non-Metrobus Routes

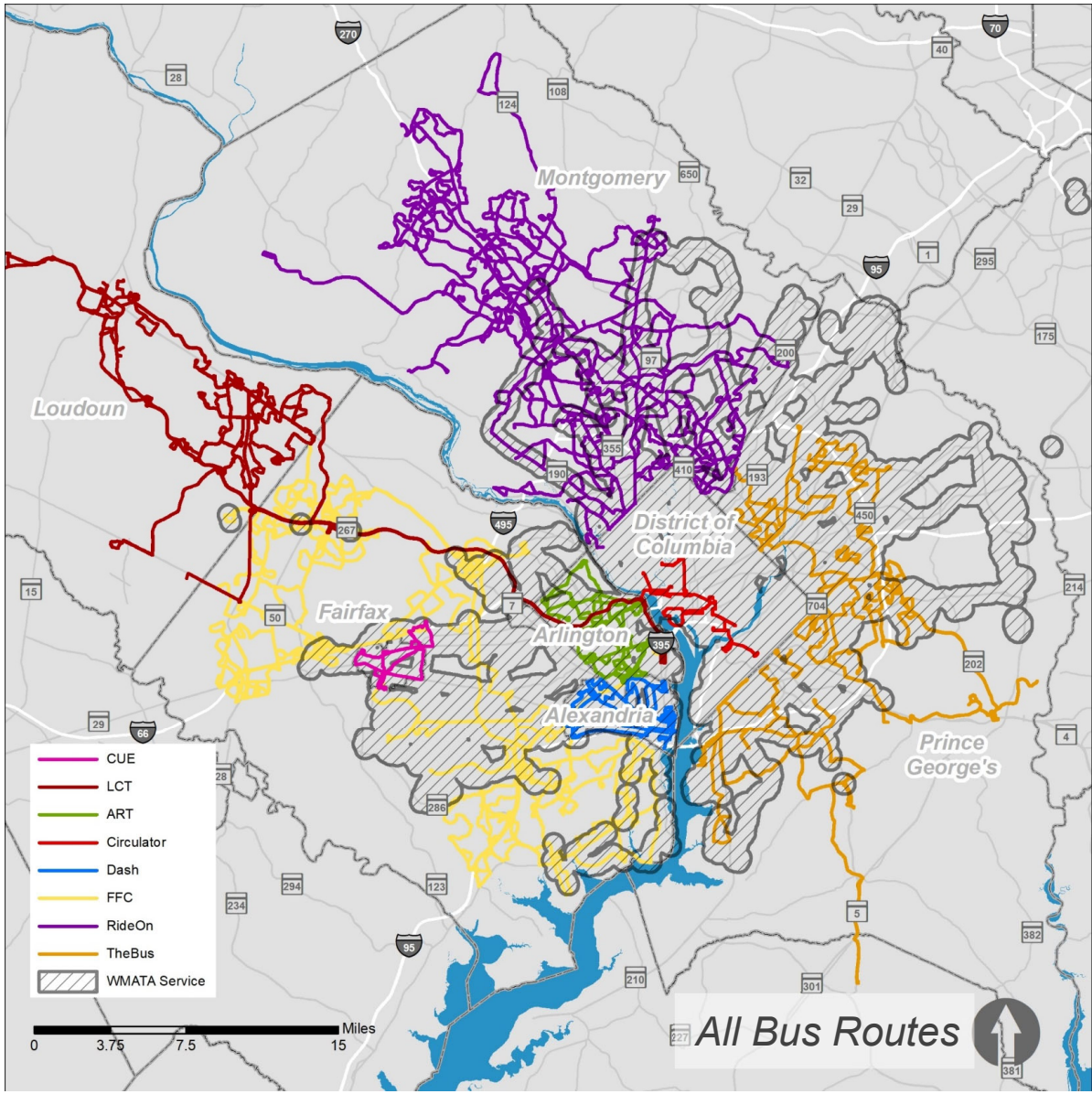
- Loudoun County Transit
- CUE
- ART
- DC Circulator
- DASH
- Fairfax County Connector
- Ride On
- The Bus



Region's Bus Service Providers

There are currently nine providers across the WMATA Compact area:

- Metrobus
- Loudoun County Transit
- The Bus
- Fairfax County Connector
- Ride On
- ART
- DASH
- CUE
- DC Circulator



Bus is a major part of the region's transportation system

Agency	Average Daily Ridership	Number of Routes	Fleet Size	Annual Operating Cost * (millions)	Service Types		
					Local Service (General bus service)	Corridor Service (High Frequency, Limited Stop)	Special Service (Late Night, Airport, etc.)
Metrobus	443,000	254	1,503	$590.10	✓	✓	✓
Ride On	85,000	80	338	$109.00	✓	✓	
Fairfax County Connector	33,000	87	303	$81.40	✓	✓	✓
DC Circulator	16,000	6	67	$19.00	✓	✓	✓
The Bus	15,000	28	93	$27.10	✓	✓	
DASH	14,000	13	85	$16.10	✓	✓	
ART	10,000	23	65	$12.10	✓	✓	
CUE	3,000	2	12	$3.30	✓		
Loudoun County Transit	2,000	30**	112	$7.60	✓		
Total	621,000	523	2,578	$865.7			

Source: National Transit Database (2016 and 2017)

* As noted in the 2018 Regional Bus Service Provision Study by the Transportation Planning Board, there is a significant variation in how agencies attribute costs for operations, maintenance, and capital expenses of bus service. https://www.mwcog.org/documents/2018/12/27/regional-bus-service-provision-study/

**Does not include commuter bus routes

WMATA Adopted Definitions of Regional and Non-Regional Bus Routes

- Blue Ribbon Mobility Panel, 1997

Funding and Service Decisions Based on the Following Definitions

Regional Routes (funded jointly by jurisdictions)			**Non-Regional Routes** (funded by individual jurisdictions)
Interjurisdictional Connection (at least ½ mile in each jurisdiction)	**OR**	• Serves at least 1 COG Regional Activity Center • Travels significant distance/regional artery • Achieves cost effectiveness	Any routes that do not meet the criteria of a regional route

Metrobus jurisdictional subsidy allocation formula depends on regional v. non-regional route definition and designation

Despite the reach of bus, providers are contending with significant challenges

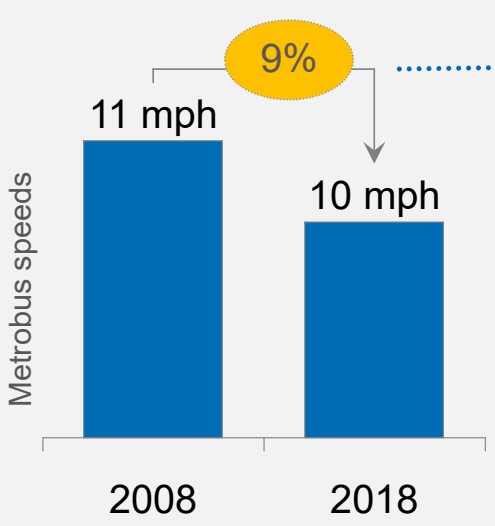
Bus **speed** declining

Bus **ridership** decreasing

Mounting pressure on **operating model**

The challenge: buses are slow and getting slower

Buses travel slower today than 10 years ago…



~$30M

increase in operating expenses associated with bus speed decline

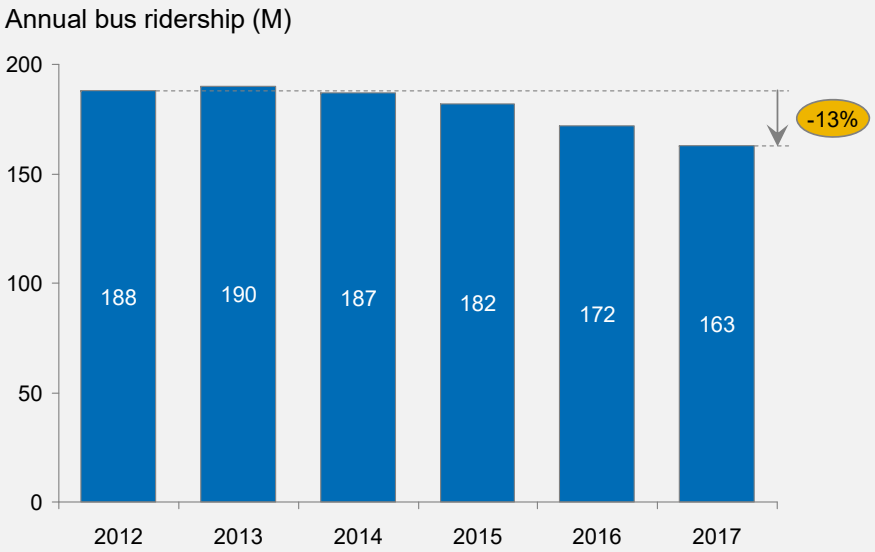
Source: National Transit Database, WMATA FY19 budget. BCG Analysis

…as a result of multiple changes to the landscape

- Increased **congestion**
- On-street **parking**
- Proliferation of **bus stops**
- **Curbside** developments
- Lack of **enforcement** for deliveries, taxis, etc. in bus lanes and at stops
- Elimination of historical **bus lanes**

The challenge: fewer people are riding bus

Bus ridership in the region declined by 13% over the last five years



Key reasons riders are switching from bus to other modes

Increased **customer expectations**

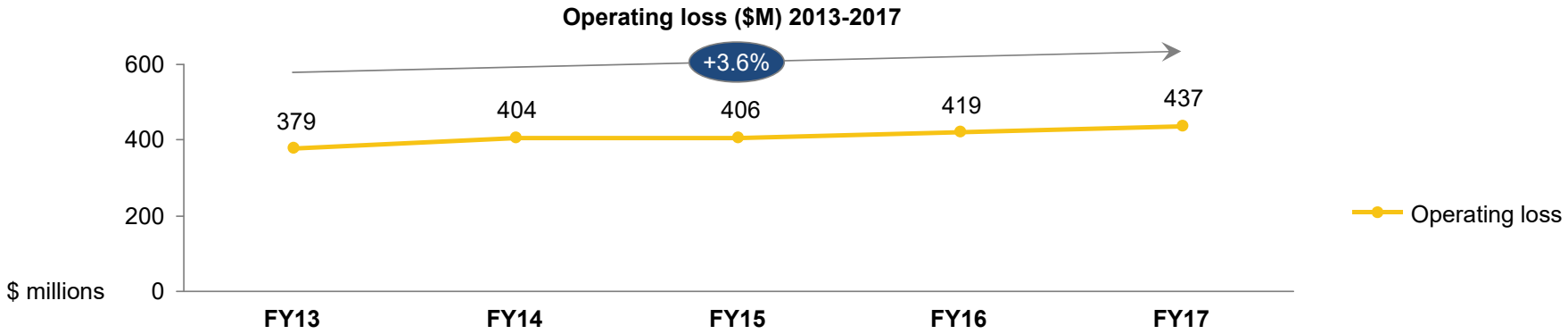
Underlying **mobility trends** and **trip patterns**

Rise of **new mobility** options

Intensifying **competition** for smaller pool of riders

Operating loss grew 3.6% per year since 2013

Growth in cost outpaced modest revenue increase over same time period



						4YR CAGR %
Revenue $M	157	165	176	166	163	**+0.9**
Cost $M	536	569	582	585	600	**+2.9**
Operating Loss $M	**379**	**404**	**406**	**419**	**437**	**+3.6**

Revenue decline in last 2 years has accelerated operating loss growth: -4.3% from FY16 to FY17

Source: WMATA Bus Modal FY12-17 P&L Expense by Category.

Three major factors driving Metrobus cost growth – personnel costs, deadhead, and slow bus speeds

1

Increased personnel costs

Accounts for 80% or $80M of cost increase from 2013 to 2017, includes salaries & wages, fringe benefits and overtime expenses

2

High percentage of time and miles spend on deadhead

Metrobus could save, e.g., $16M per year by reducing deadhead hours from 14% to 9% of total platform hours

3

Declining bus speeds

Average Metrobus speeds declined ~1mph since 2007

1mph increase in average bus speeds would unlock savings equal to 4% of operating costs

Other local operators are also experiencing many of these challenges (e.g., road congestion impacting bus speeds)

The challenge: mounting pressure on Metrobus operating model

3% subsidy growth cap for Metrobus

Metrobus operations funded by fares and operating subsidy (contributions from jurisdictions)

As of FY2020, WMATA must comply with a 3% cap on operating subsidy growth for WMATA operations

Difficult to achieve with current service model

Metrobus operating losses continue to increase, driven by rising costs and declining revenues

Meeting subsidy cap will require substantial changes to the operating model in place today, and the process and procedures that support that model

Implications for regional bus system

Local bus operators and WMATA must work together to identify roles and responsibilities for bus that meet the needs of the region

The challenges must be addressed collaboratively and equally; they are not a WMATA problem but a regional one.

Subsidy growth cap creates greater urgency for regional action

The opportunity: we can make bus work better for the region

Derive maximum value from our existing roadway infrastructure

Better match service and demand

Speed up point-to-point travel for workers, tourists, and families

Changes to **governance, funding structure, and political priority** will enable this transformation

Case Studies for Bus

These issues are national trends that transit agencies are trying to solve in different ways

Improving **bus speeds** by providing dedicated lanes, signal priority and other treatments

Redesigning bus networks in regions with a single service provider

Increasing **service frequency** and **expanding service** to new areas

Case study

Transit Signal Priority model: Portland TriMet

Context

TriMet, along with the City of Portland and other regional partners, identified corridors to roll out TSP technology in the early 2000s

As a joint effort, TriMet and the City of Portland created the Streamline program, a package of capital projects and service improvements designed to improve service to all passengers and provide operating efficiencies to TriMet

Approach

Initially installed TSP capabilities at more than 250 intersections

Program objectives were to:

- Improve schedule reliability
- Reduce time inconsistencies
- Improve fuel savings and air quality benefits
- Increase ridership through service dependability

Outcomes

TriMet experienced 10% improvement in travel time

TriMet experienced 19% reduction in travel time variability

According to the Journal of Public Transportation, TriMet estimated to have saved approximately $13.4 million over eight years

Sources: US Department of Transportation: Characteristics of Bus Rapid Transit for Decision Making (2009); Trimet: TriMet and the City of Gresham improve transit service along SE Division (2013)

Case study

Commitment to Bus: Seattle - King County Metro

Context

Seattle region has made a concerted effort to improve bus service and operations through a range of improvements

Improvements are designed to:

- Speed-up bus travel times
- Improve reliability of bus travel
- Provide frequent service all day
- Improve customer experience

Approach

Dedicated bus lanes or bus-only roads during peak periods (i.e. Third Avenue)

Focused land use development and growth into designated areas

Additional annual funding of $45 million/year approved by ballot measure

270,000 additional revenue-hours of bus service in the first year alone

Additional $50 billion approved to add LRT and 3 BRT lines

Outcomes

8% increase in bus ridership over the past 9 years - one of the only bus operators in the country not experiencing ridership declines

Surveys show 85% of bus riders are riders by choice

Dramatic increase in the number of households with access to high frequency transit – from 25% in 2015 to 64% in 2017

METROPOLITAN TRANSPORTATION COMMISSION

Case study

Regional governance model: Bay Area MTC – governance body with broad authority

Context

Metropolitan Transportation Commission (MTC) plays a coordinating role across all 26 Bay Area transit entities in nine counties

Serves as the arbiter of federal funds, has regional tax authority, and is the region's fiduciary agent for transit empowered by California state law

Manages several regional operational programs

- Regional pavement management
- Arterial operations
- Regional signal timing programs
- Ridesharing
- FasTrakelectronic toll collection

Approach

Oversees operating and capital funding

- Distributes significant funding to transit projects
- Apportions operational transit funding on a discretionary basis
- Created regional criteria to evaluate new capital investments

Sets shared service standards

- Outlined regional transit performance metrics (Transit Sustainability Project)

Plans regional operational improvements

- Implemented regional fare card (Clipper) that operates on major systems
- Sets broad regional plans for transit

Insights

MTC more powerful than most other regional oversight bodies, making regional coordination more effective

- State grants MTC significant power through legislation
- Surplus toll revenues give MTC a funding source that it can leverage to exercise discretion over the selection of transit capital improvements

Source: TransitCenter: The role of Governance in Regional Transit (2014); MWCOG study

Case study

Roadway pricing model: Transport for London

Context

Resource pricing zone includes the area inside London's Inner Ring Road, a 13-square mile zone encircling the inner city

Primary goals:

- Reduce congestion
- Improve air quality and public health
- Improve journey time reliability

Ancillary improvements:

- 300 new buses
- Updated bus routes
- Improved frequency of buses
- 8,500 park-and-ride spaces
- Bike/pedestrian infrastructure

Approach

Price: Flat daily fee of £11.50 (US $15.21)

Payment mode: Payments can be made by telephone, text message, online, by post, or via registering for auto pay.

Hours of effect: 7:00am- 6:00pm Monday-Friday; no charge on weekend, or holidays

Investment: £161.7M (USD $214M)

Annual operating cost: £130M (USD $172M)

Outcomes

Bus ridership has increased by 38%

Traffic entering the zone during charging hours has declined by 18%

Traffic circulating within the zone has declined by 15%

Reliability and journey time improved as well

Annual revenue: £137 million/year (USD $182 million)

Sources: Streetblog: Road Pricing in London, Stockholm and Singapore; Tri-State Transportation Campaign

Bus System Re-designs have been completed at many agencies to improve ridership and operational efficiency

Baltimore, MD - 2017

Houston, TX- 2015

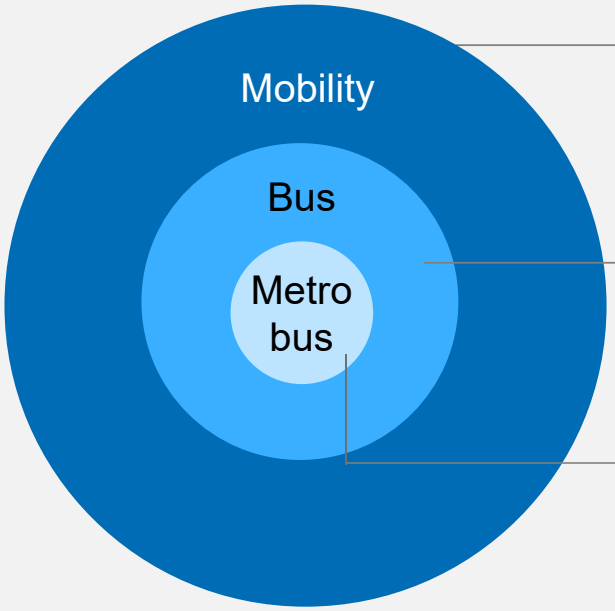
Columbus, OH - 2017

Richmond, VA - ongoing

- To date, completed primarily in regions with a **single bus operator**
- Offer the opportunity to reallocate bus resources and improve service, but are **not always cost-neutral**
- Focused solely on bus service design, and **do not address other major regional issues**, such as governance, funding, and regional coordination across providers
- **Not** a part of this phase of the Bus Transformation Project, but potentially an element of the roadmap

Project Overview

Scope of this project is to develop a bold strategy for regional mobility on the region's roads



Regional mobility strategy

Develop strategy for mobility in the region that advances innovations, increases economic competitiveness of the region, and thinks boldly about the future

Role of bus

Define the role of bus and bus operators in light of the bold regional strategy and create a roadmap to get there

Role of Metrobus

Identify path forward for Metrobus, as well potential implications for other local bus operators

Project Governance and Timeline

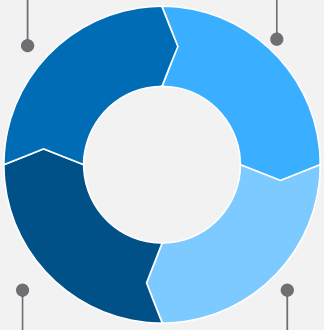
Four-part team leading Bus Transformation Project

Executive Steering Committee

Recognized leaders that are closely involved with strategy development and manage political risks and benefits to the region

WMATA Leadership Team

Decision-makers within Metro that manage and evaluate actions that affect the organization and its operations



Strategic Advisory Panel

Senior staff and appointed members that review major work products and advise consultant team

Technical Team

Recognized discipline leaders within Metro and senior jurisdiction transit staff that review technical and financial analyses

Four-part strategy development process

We are here

Set **strategic direction**	Develop **draft strategy**	Align on **final strategy**	Develop 10-year **roadmap**
November	*Nov. to Spring*	*Spring-Summer*	*Summer - Fall*
Define core strategic considerations for bus in the region and understand stakeholder perspectives on where region should land	Conduct focused analysis to develop draft strategy, including high-level understanding of key costs and benefits	Refine strategy and define expected outcomes	Identify specific actions required to achieve strategy vision in a 1, 3, 5, and 10-year action plan

Project Goals

Project Vision:

Bus will be the mode of choice on the region's roads by 2030, serving as the backbone of a strong and inclusive regional mobility system.

Goals for bus in the region as voiced by stakeholders

	Theme	Goals
1	Regional connectivity	Provide high-quality on-street transit options that efficiently and reliably connect people to places and improve mobility
2	Rider experience	Ensure that bus is a convenient, safe, easy-to-use, user-centered mobility option
3	Financial stewardship	Maintain a transit mode that is financially responsible in the long-term
4	Sustainable economic health & access to opportunity	Encourage vibrant, economically-thriving and sustainable communities through investments in bus
5	Equity	Create a transit system that is affordable and equitable to users

Stakeholder Outreach

Extensive public outreach and stakeholder engagement

- 5,679 Survey Responses from the General Public
- 20 Public Pop-Up Events
- 40 Stakeholder Interviews
- Kickoff Summit with 140+ Participants
- 13 Metrobus Division Engagement Events
- 3 Focus Groups
- 6 Executive Steering Committee Meetings
- 3 Technical Team Meetings
- 1 Strategy Advisory Panel Meeting
- 3 External Project Briefings
- 5 WMATA Leadership Team Briefings
- 5 Other Meetings and Workshops
- 93 postings on social media by 10 different agencies
- 69 people reached by postings on the project Facebook page

As of 12/31/2018

Public Survey Recap

- Survey distributed online and at **20 pop-up events** around the region.
- **5,679 responses** obtained – exceeding goal of 3,000 by almost 90%
- The survey's **wide distribution** reached many frequent bus riders across the region.

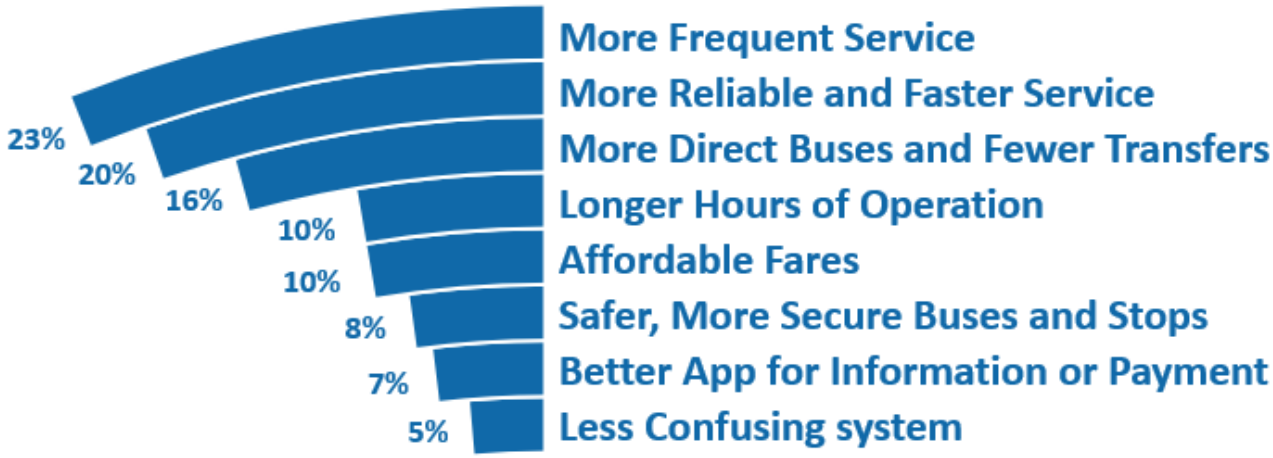
As of 12/31/2018

Survey Results: Investment Priorities

The top three choices for investment were largely **consistent across the region and demographic groups**.

Frequent, occasional, and non-riders also had the **same top three investment choices.**

Affordable fares were a slightly higher priority among low-income and non-white respondents, as well as frequent riders.



Respondents were asked to prioritize improvements to local bus service by apportioning “coins” from a hypothetical budget of 20 coins to eight different categories of improvement types based on their preferences.

What we heard

Top 3 reasons for riding bus:

1. It is the closest transit option to my home or work.
2. It is the most affordable option.
3. It is easy to use.

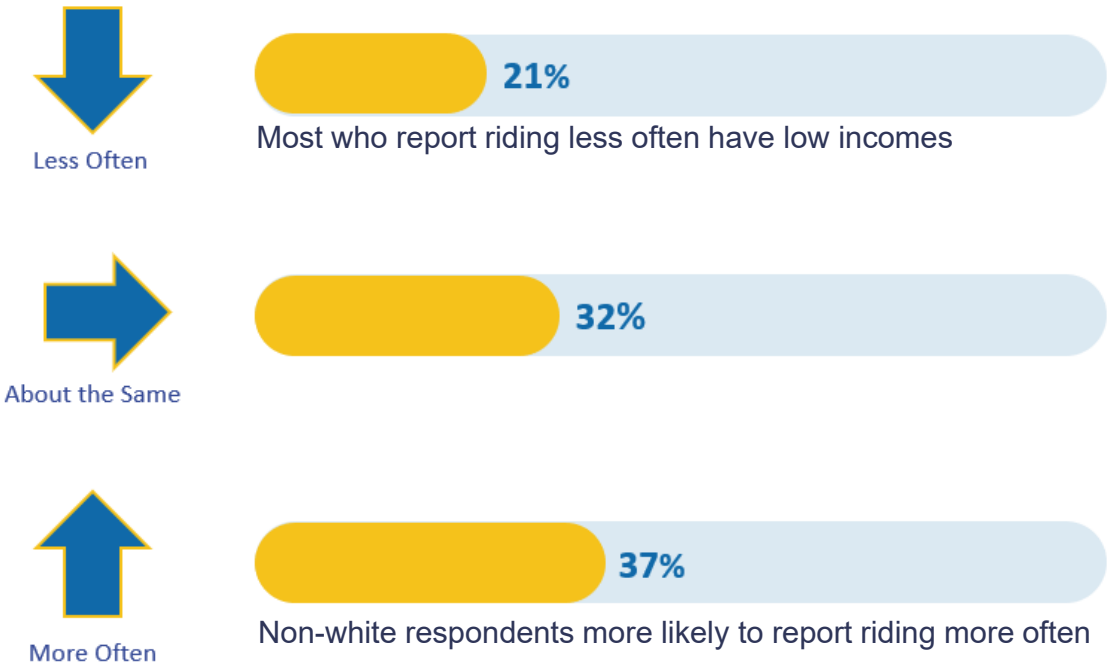
Top 3 barriers to riding bus:

1. The bus comes to infrequently.
2. The bus is too slow.
3. Buses don’t go where I need to go.

Barriers listed are consistent between frequent, occasional, and non-riders.

Change in Bus Use

While overall bus ridership across the region has declined, some survey respondents indicated they ride about the same (32%) or more often (37%) compared to three years ago.



Key findings:

- 80 percent of frequent bus riders are riding more now.
- 67 percent of non-frequent bus riders are riding less frequently.
- For both groups, a change in home or work location was the most frequently cited reason for a change.
- Changes in bus reliability cited approximately the same number of times by people who ride more and less, indicating that perceptions of bus reliability vary considerably.

Elected Official and Stakeholder Outreach

- **In-person interviews** held with all key agencies in July-August, 2018
- Ongoing **Executive Steering Committee, Strategy Advisory Panel, Tech Team committee meetings** ensure stakeholder participation and **guidance on major issues** including project vision and goals, strategic direction, and technical analysis
- **County and City elected official** briefings are underway
- Briefed interested **Congressional delegations**

Strategic Choices

Analysis underway to answer five strategic questions

Guidance provided by WMATA Leadership Team, Executive Steering Committee, Technical Team, Strategy Advisory Panel, and Public Survey

What is the role of Bus in the region?

Thorny Questions

How can access to bus-type service be provided regionally, beyond the traditional 40-foot bus?

What services should Metrobus operate?

What defines the service that Metrobus, as a regional entity, should operate?

What is the region's commitment to Bus?

What are the costs and benefits of prioritizing bus in the region?

What regional business functions should WMATA provide?

What benefits might be realized by pursuing support-as-a-service models for various functions regionally?

What regional structures are needed?

What organizational structures would best support improved regional coordination and rider experience?

Next Steps

We are here

Set **strategic direction**	Develop **draft strategy**	Align on **final strategy**	Develop 10-year **roadmap**
November	*Nov. to Spring*	*Spring-Summer*	*Summer - Fall*
Define core strategic considerations for bus in the region and understand stakeholder perspectives on where region should land	Conduct focused analysis to develop draft strategy, including high-level understanding of key costs and benefits	Refine strategy and define expected outcomes	Identify specific actions required to achieve strategy vision in a 1, 3, 5, and 10-year action plan