

Washington Area Bus Transformation Project Progress Report

by the MetroNow Coalition



2023

An assessment of regional progress to advance the goals of the Bus Transformation Project, originally published in 2019.



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Executive Summary

The bus has been the workhorse of our transit system throughout the pandemic. Even before WMATA's overlapping crises of Metrorail safety and accountability over the past eighteen months, more people rode the bus than rail over the course of the pandemic. Families rely on the bus. Businesses depend on the bus. The vitality of the Washington metro region requires a reliable, seamless bus network.

Despite a few big wins in 2022, including the launch of a regional bus network redesign and the Ride On Reimagined study, **the region is not on track to achieve the Bus Transformation Project's vision** that, "the 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." In fact, local discontent with the regional bus system's funding and service model may lead to a more splintered regional mobility system.

Collectively, we must accelerate the capital and operating investments needed to (1) provide frequent and convenient bus service, (2) prioritize buses on our roadways, (3) dignify the entire ridership experience, and (4) work better together as a region. Now is the time for better transit!

The MetroNow Coalition



THE 2030 GROUP

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The Bus Transformation Project

The Bus Transformation Project (BTP) Strategy was the result of a two year process of expansive public engagement and technical analysis to develop a **living strategy to transform regional bus service**. Published in 2019, the BTP put forth four overarching strategies and twenty-six recommendations to help the region transform bus service.

The BTP and its Executive Steering Committee recognized that the bus is critical to the economic and social health of our region. Today, the region is heading toward a fiscal funding cliff for regional transit services when federal COVID relief funding to transit agencies runs out. If we do not act before Fiscal Year 2025, which starts July 1 2024, regional bus service may face historic cuts. **The 2023 Progress Report is intended to recognize the importance of the bus** and help the region prioritize efforts to accelerate progress toward the vision of bus transformation.

MetroNow's Progress Report

The MetroNow Coalition produced the first Progress Report in 2022 to measure progress against the BTP's twenty-six recommendations. That first report, published last year, highlighted how the region's transit agencies made progress implementing the vision, despite the pandemic. MetroNow also encouraged the region to collaborate on six key priorities in 2022 to advance the goals of bus transformation.

This year's 2023 Progress Report includes:

- Assessment of regional progress against last year's priorities¹
- Feedback from agency staff on priorities and focus areas for 2023
- MetroNow's recommended bus priorities for 2023
- Fast facts and appendices on bus performance

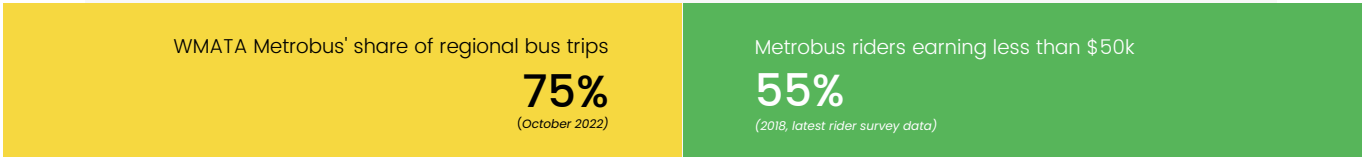
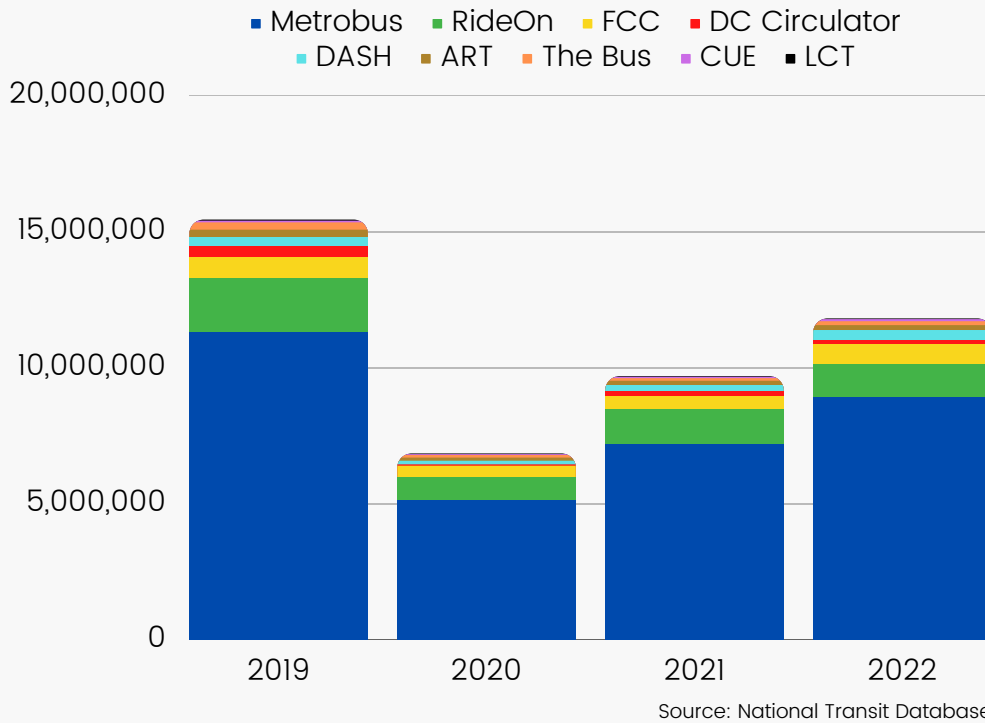
We hope this report is a useful tool that helps to remind readers and leaders about the need to lean in, align behind key priorities, and accelerate action to build a better, seamless, and more reliable regional bus system.

¹ The grades assigned to 2022 Priorities reflect the coalition's best assessment of regional progress made over the past year and where we are falling behind.

Regional Bus Fast Facts



Regional Bus Ridership in October from 2019 to 2022



More people rode the bus than rail
11.8m bus trips in October 2022 compared to 9.1 m Metrorail trips

Progress in 2022

Last year, MetroNow selected six priorities for 2022, shown color-coded by the associated strategy of the Bus Transformation Project. The pages below summarize progress and implementation risks. **The grades reflect MetroNow's assessment of regional progress** against these six priorities and survey responses from agency staff in late Fall 2022.



01 Launch Regional Bus Network Redesign (A)

WMATA launched the Regional Bus Network Redesign process with The Bus and CUE. Meanwhile, Montgomery County launched their Ride On Reimagined Study (see [page 6](#)).

02 Build & Enforce 10 New Miles of Bus Lanes (C-)

The District of Columbia demonstrated that bus lanes can be built quickly to improve reliability on high-ridership corridors, building five miles in 2022. No other jurisdiction built any in 2022 (see [page 7](#)).

03 Retain & Recruit Bus Operators (B)

Across the region, agencies continued to struggle to attract and retain enough bus operators to deliver full service. The operator shortage made bus service more unreliable, but improved from last year (see [page 8](#)).

04 Zero Emissions Infrastructure & Workforce (C+)

Jurisdictional agencies led the effort to transition to zero emission bus fleets. More must be done at the regional level to coordinate EV implementation and take advantage of the historic levels of federal investment in bus fleet electrification (see [page 9](#)).

05 Regional Bus Data & Best Practices (C)

The region made limited progress sharing bus data and adopting best practices. The region is lacking bus lane enforcement technology and consistent enforcement practices (see [page 10](#)).

06 Address the Transit Funding Fiscal Cliff (F)

The region has yet to identify a long-term funding model to maintain and expand regional bus service after the federal COVID relief money for transit agencies runs out (see [page 11](#)).

Legend: MetroNow's 2022 Priorities color-coded according to BTP Strategy

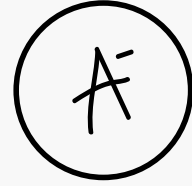
Strategy 1
Provide frequent and convenient bus service

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Give buses priority on roadways

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Create an Excellent Customer Experience

Strategy 4
Regional Collaboration to Transform the Bus

Launch Regional Bus Network Redesign



WMATA Better Bus Initiative & Ride On Reimagined Study

This year, WMATA launched the 'Better Bus' regional bus network redesign process that will create a new regional bus network that will be implemented in Fiscal Year 2025. Prince George's County's The Bus and Fairfax City's CUE bus services are both official participants in the redesign process. Meanwhile, Montgomery County's Ride On has launched its own 'Ride On Reimagined' study.

The Benefit

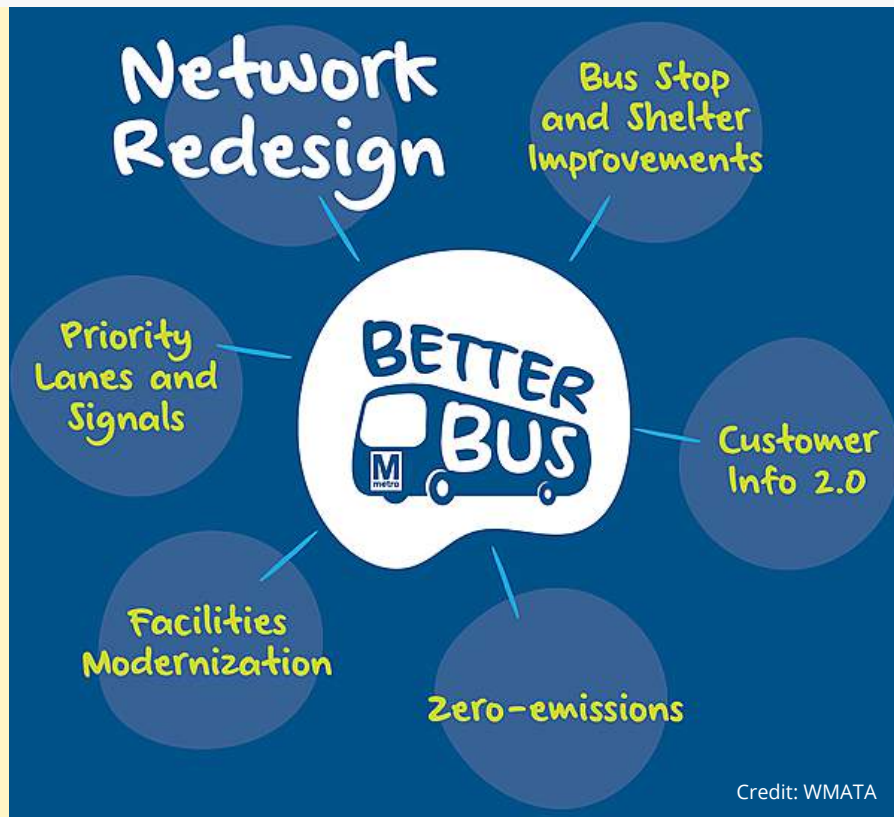
Network redesigns can improve the efficiency and effectiveness of the bus network by taking a com-prehensive look at the bus network to identify ways to better meet the needs of the community and riders.

The Risks

Lack of coordination across providers, discontent with the funding formula, and a new NVTC study to explore local transit agencies assuming the operation of Metrobus services in Northern Virginia could lead to more local, but less regional bus service.

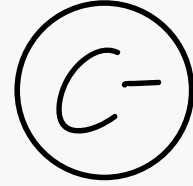
Next Steps

1. WMATA should reevaluate the Metrobus funding formula with the redesign and local leaders should plan to coordinate enhancements with the network's launch in FY '25.
2. Elected leaders should think big and regionally when weighing the costs and benefits of the 'Better Bus' redesign's alternatives.



Watch MetroNow's Bus Network Redesign webinar

Build & Enforce 10 New Miles of Bus Lanes



5.1 miles of new bus lanes were built in 2022

The District of Columbia has continued to lead the region in the planning and construction of dedicated bus lanes. MetroNow commends Mayor Bowser and DDOT for its leadership and partnership with WMATA to expand the region's network of dedicated bus lanes, especially as the District has some of the highest bus ridership and most congested corridors in the region. In 2023, we look forward to new bus lane projects in Montgomery and Arlington Counties.

The Benefit

Bus lanes, when enforced and painted red, make buses more reliable and efficient. This is especially important on congested corridors. Bus lanes can create a better experience for bus riders and drivers.

The Risk

Bus lanes do not work if they are full of cars and trucks. If bus lanes are not painted red and properly enforced, riders and the wider bus network will not see performance or efficiency gains, sapping political will for bus priority.

Next Steps

WMATA and local providers should implement model bus lane standards, enforcement practices, and enabling legislation that can ensure consistent performance for bus lanes across the region.

Miles of Transportation Infrastructure

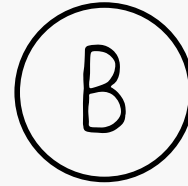
	Dedicated Bus Lanes	Roadway Lanes	Bike Lanes
Maryland ¹	0.5	13,900+	-
DC	11.6	2,626	100+
Virginia ²	5	14,000+	-
Washington Metro	17.1	30,526+	-

¹ Within Prince George's and Montgomery Counties

² Within Northern Virginia District

All 5.1 miles of new bus lanes in 2022 were built in DC

Retain & Recruit Bus Operators



The bus operator crisis is less acute than last year, but remains a challenge.

MetroNow asked the region's nine major bus providers whether their ability to hire, train, and retain bus operators is better, worse, or about the same as this time last year. Four agencies reported it was better, four said it was about the same, and one agency reported it was worse than last year. On the whole, these results indicate that the transit operator crisis is less acute than last year while hiring, retention, and COVID impacts are still a significant challenge.

The Benefit

The region needs enough bus operators, mechanics, and supervisors to provide reliable service schedules. Expanding training programs will help agencies better compete for talent.

The Risks

While the crisis is less acute, agencies should use this time to prepare for the next shock and grow the talent pipeline to address the coming surge in retirements.

Next Steps

WMATA and local providers should work with transit unions to expand training, outreach, and pipeline development programs across the region to enable new service expansions, thereby creating more reliable service.

TransitCenter

Bus Operators in Crisis

The Steady Deterioration of One of Transit's Most Essential Jobs,
and How Agencies Can Turn Things Around

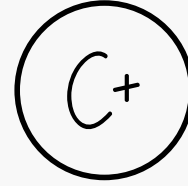


Credit: Transit Center



Watch MetroNow's [Transit Workforce](#) webinar

Zero Emissions Infra-structure & Workforce



Local wins but lacking a regional approach.

Note: Even switching from a car to a diesel bus reduces emissions.

Prince George's County (\$25m), Montgomery County (\$14.9m), and the District of Columbia (\$9.6m) all received grants from the Federal Transit Administration's FY2022 Low- and No-Emission and Bus and Bus Facilities programs to support zero emissions infrastructure and fleets. A regional zero emissions infrastructure application in 2023, led by WMATA, could help accelerate regional coordination and charging infrastructure deployment.

The Benefit

Zero emissions buses reduce noise and pollution, thereby improving living conditions for residents. Long-term, they can also reduce operating and maintenance expenses.

The Risks

The transition will require training to maintain legacy and new technologies, costs to add supportive infrastructure, and enhanced coordination with utility companies.

Next Steps

WMATA should lead a regional application for the Low- and No-Emissions federal grant program to create shared maintenance facilities, vehicle compatibility, and standard charging protocols to help accelerate the transition.

FLEET SIZES & ZERO-EMISSIONS TARGETS

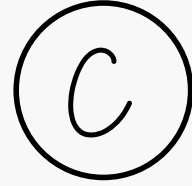
	Metrobus	ART	DASH	DC Circulator	Fairfax Connector
Fleet Size	1,500	78	101	73	340
Electric Buses	1 (435 CNG; 861 Hybrid)	0 (78 CNG)	14	15	0 (8 BEB ordered)
ZEF Target Year	2045	-	2037	2030	2035
	Fairfax City CUE	Ride On	The Bus	Loudoun County Transit	
Fleet Size	12	389	95	107	
Electric Buses	0	4 (10 BEB ordered; 13 HFC awarded)	12	0 (2 BEB + 2 CNG ordered)	
ZEF Target Year	-	2035	70% by 2035	-	

BEB: Battery Electric Bus; CNG: Compressed Natural Gas; HFC: Hydrogen Fuel Cell



Watch MetroNow's [Zero Emissions Transit](#) webinar

Regional Bus Data & Best Practices



Some local progress but lacking regional wins

Agencies reported several novel data practices but little regional coordination. MetroHero's [ARIES for Transit](#) dashboards remain the best regional aggregator of bus data. Local projects include:

- ART is using data and key performance indicators to develop their Transit Strategic Plan
- CUE is using automated passenger counting (APC) and on-board surveys to better understand system ridership and the effectiveness of their zero-fare pilot
- DASH is using Hopthru to visualize ridership data from its APC system and Geckboard to create public dashboards of performance metrics
- Fairfax Connector is tracking boardings and alightings by stop to optimize routes
- Loudoun County Transit is exploring real-time service information at bus stops
- NVTC launched a [transit data dashboard](#) for operators in Northern Virginia
- RideOn is measuring performance with Ridecheck Plus to make tri-annual running time adjustments
- WMATA is using cellphone location data to identify opportunities for new connections that transit could service.

The Benefit

Regional datasets and best practices can help create a bus network that is easy and seamless for riders to use.

The Risks

Without adequate coordination, the procurement of new technologies & fleets may make regional data sharing more difficult.

Next Steps

1. WMATA and local agencies should study the impacts of bus lanes on performance, local business impacts, & traffic congestion.
2. MWCOG should lead coordination with local providers and WMATA to devise a regional travel survey that better reflects transit trips to support future regional planning efforts.



Watch MetroNow's [Bus Data](#) webinar

Address the Transit Funding Fiscal Cliff



WMATA expects a \$527m+ gap in FY '25 operating budget.

WMATA provides 75% of the region's bus trips and all of the region's metro trips. If the region does not come together to solve WMATA's long-term funding and accountability challenges, the region could see catastrophic service cuts. While the Metro for DC Act will pay WMATA to cover the cost of bus fares for bus trips made in DC, a regional approach is needed to ensure adequate funding, proper accountability, and future growth of Metrorail, Metrobus, and local bus services is possible. The Better Bus redesign and Metrobus Funding Formula must be a part of the conversation as the region identifies a regional transit funding solution.

The Benefit

Long-term sustainable funding solutions for WMATA, and all of the local transit operators, will allow for better planning, provision, & maintenance of transit services and assets for the region.

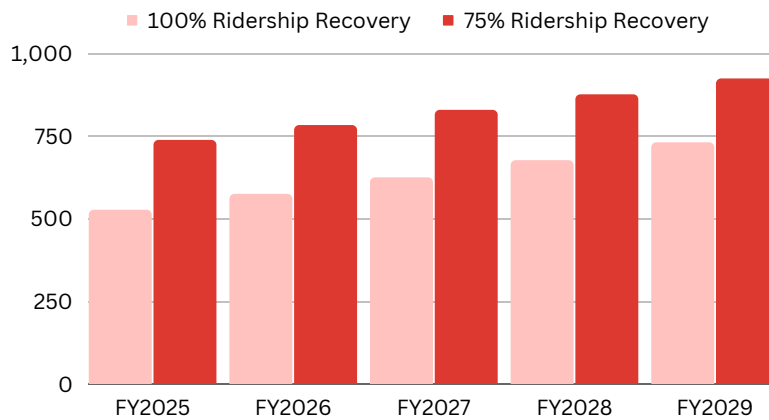
The Risks

The economic, social, and cultural health of the Washington metro region is at risk if WMATA's ability to provide regional transit services is threatened. Failure to find a solution could be catastrophic.

Next Steps

1. WMATA should clearly outline what is at risk and long-term funding needs.
2. Regional leaders should come together to align behind a regionally preferred funding model before June 2024

WMATA's Projected Operating Budget Gap
in millions of \$



Source: WMATA, GM/CEO's FY2024 Proposed Operating and Capital Budget

Agency Survey Results

MetroNow asked each of the region's transit agencies to pick which of the original 26 BTP recommendations are most important to tackle in 2023. Agency priorities are shown below:



Strategy 1 Provide frequent and convenient bus service

Advancing the regional Bus Network Redesign and examining Metrobus' funding formula, as part of the redesign process, were the most important priorities for agency staff.

Strategy 2 Give buses priority on roadways

Jurisdictions making public commitments to bus priority in 2023 were cited as most important, including bus lanes, intersections with transit signal priority, and bus lane enforcement.

Strategy 3 Create an Excellent Customer Experience

Providing riders with real-time service information and safe, comfortable, and accessible bus stops were selected as the most important to tackle.

Strategy 4 Regional Collaboration to Transform the Bus

Implementing a regional platform for rider feedback, that can recognize what agency is used and funnel input accordingly was the favorite.

MetroNow's Bus Priorities for 2023

This year's priorities were selected based on MetroNow's agency survey in Fall 2022, conversations with transit agency staff in the winter of 2023, and our assessment of where more work is needed to advance the vision of Bus Transformation. Each priority includes a metric to watch to gauge regional success. Next year, we hope the region exceeds our expectations.



01 Address the Transit Funding Fiscal Cliff by Identifying a Funding Model for Transit Preservation and Expansion

The region must identify or create a regionally preferred long-term sustainable funding model to maintain and expand bus (and Metrorail) service. This is especially important heading into Fiscal Year 2024, as that is the last year WMATA expects to be able to achieve a balanced budget without significant additional support from the local jurisdictions, states, or federal government.

Key Metrics: *Transit operating & capital budgets*

02 Align Behind a Better Bus Network Redesign Option

WMATA's Better Bus redesign will present two networks, one that uses existing resources and a visionary network that expands service. The ability to improve access, equity, and economic growth should drive the selection.

Key Metric: *Increased access to frequent transit*

03 Build 10 Miles of New Dedicated Bus Lanes

The region can be a national leader in terms of bus performance and ridership by creating a network of dedicated (and enforced) bus lanes to ensure bus trips are quick and reliable. Bus lanes create better experiences for today's and tomorrow's riders.

Key Metric: *Miles of new bus lanes*

04 Create a Regional Bus Stop Improvement Plan

In coordination with the Better Bus network redesign, WMATA, roadway owners, and local jurisdictions should develop, fund, and implement a bus stop improvement plan to create safe access to and from high-quality bus stops.

Key Metric: *Bus stops with shelters*

05 Monitor Regional Policy & Investment Impacts

As the regional bus system continues to transform with the launch of a redesigned bus network, more dedicated bus lanes, and the expansion of free fares, WMATA and the local providers should design a shared system to assess impacts.

Key Metrics: *Ridership & average bus speeds*

Legend: MetroNow's 2023 Bus Priorities color-coded according to BTP Strategy

Strategy 1
Provide frequent and convenient bus service

Strategy 2
Give buses priority on roadways

Strategy 3
Create an Excellent Customer Experience

Strategy 4
Regional Collaboration to Transform the Bus

Now is the time for better transit!

This progress report is intended as an annual reminder to recommit ourselves to the goals and vision presented in the Bus Transformation Project. Collectively, we can transform the region's bus network by prioritizing high-quality bus service as a critical tool to enhance social, economic, and environmental equity. We hope this report helps catalyze focus and regional collaboration. Thank you for reading the MetroNow Coalition's 2023 Bus Transformation Project Progress Report.

The MetroNow Coalition



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Newsletter

<https://metronowcoalition.substack.com>



Website

www.metronow.com

Appendix: Agency Staff Requests to Region's Leaders

As part of the Agency Survey, MetroNow asked the region's transit agencies where they would like to see a greater focus by leaders to prioritize regional bus transformation. Below are some of the observations and themes from the survey responses:

<p>Focus more on reliability and improved headways.</p>	<p>Encourage roadway owners (e.g. DOTs) to build transit-friendly amenities and safety projects.</p>
<p>System connectivity between jurisdictions & modes: system information, fares, transfers, etc.</p>	<p>Emphasize more frequent, all-day service in places where more people can use it.</p>
<p>Focus on making bus service easy and safe to grow ridership.</p>	<p>Create a sustainable long-term funding mechanism for annual bus operating budgets.</p>
<p>Think regionally about fare policy, payments, resiliency, and the customer experience.</p>	<p>Collaborate on alternative fueling and electric charging stations for transit vehicles.</p>

Legend: Agency Staff Requests to Leadership color-coded by BTP Strategy

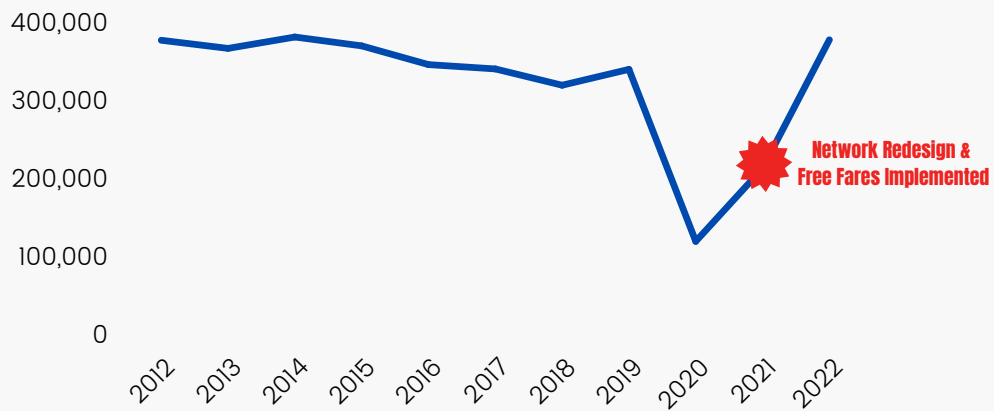
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Appendix: Trend to Watch in 2023 | Free Fares

As Alexandria continues its free fares on the DASH system, the Fairfax County Connector implements half-priced fares for qualifying low-income riders, and DC implements the Metro for DC Act, the region should closely watch these innovative experiments to assess the impacts of free and lower-cost fares on ridership and service. According to DASH's customer survey, the biggest factor explaining their dramatic increase in ridership was the "increased frequency" from the network redesign, while the second biggest factor was "free fares". Learn more by reading the [DASH Fare-Free Program Report](#).

DASH served 380k riders in September 2022, the most in a single month since 2015.

DASH Ridership (September)



Source: National Transit Database

DASH riders who started in last 12 months

22%

Riders using DASH more because it is free

71%

Appendix: 2021 Ridership, Fleet Utilization & Operating Expenses

Contains unlinked passenger trips (the number of passengers who board public transportation vehicles), fleet size and utilization, and operating expenses compared to unlinked passenger trips.

	Unlinked Passenger Trips (UPT)	Vehicles Operated in Max. Service	Vehicles Available for Max. Service	Share of Vehicles in Service at Max. Service	Total Operating Expenses	Operating Expenses per UPT
WMATA Metrobus	52,325,667	1,010	1,506	67%	\$719,628,976	\$13.75
Montgomery County Ride On	10,078,042	255	366	70%	\$138,279,560	\$13.72
Fairfax County Connector	4,566,013	276	329	84%	\$96,527,709	\$21.14
City of Alexandria DASH	1,521,938	67	96	70%	\$25,708,814	\$16.89
Arlington County ART	1,391,820	42	78	54%	\$21,457,360	\$15.42
DC Circulator	1,171,986	65	71	92%	\$32,482,187	\$27.72
Prince George's County The Bus	904,970	65	82	79%	\$32,816,790	\$36.26
City of Fairfax CUE	326,881	8	12	67%	\$4,184,280	\$12.80
Loudoun County Transit	265,529	18	32	56%	\$5,026,244	\$18.93
WMATA Metrorail	36,550,201	998	1,200	83%	\$1,244,974,967	\$34.06

Appendix: 2021 Revenue Sources and Expenses

Contains sum of funds that a transit agency earns from governmental and non-governmental sources, categorized by source of funds and expenditures.

	Passenger Fares	Federal Government	Local Government	State Government	Funds Expended on Capital	Funds Expended on Operations
WMATA	\$102,039,186	\$1,120,288,424	\$795,657,136	\$508,698,826	\$1,695,771,757	\$2,215,424,991
Montgomery County	\$249,843	\$16,788,244	\$75,708,852	\$59,303,926	\$11,954,498	\$140,742,948
Fairfax County	\$3,292,592	\$0	\$92,578,082	\$340,271	\$5,224,192	\$96,527,709
City of Alexandria	\$0	\$2,320,537	\$27,036,738	\$6,747,810	\$10,432,683	\$26,884,591
Arlington County	\$1,276,711	\$1,580,290	\$3,160,606	\$23,577,116	\$9,164,630	\$23,577,116
DDOT	\$1,346	\$820,879	\$0	\$49,130,712	\$6,100,542	\$43,851,049
Prince George's County	\$78,825	\$12,184,666	\$32,978,246	\$10,306,150	\$17,775,698	\$37,693,364
City of Fairfax	\$750,000	\$81,327	\$2,706,280	\$728,000	\$0	\$4,265,607
Loudoun County	\$157,890	\$0	\$10,659,285	\$6,718,320	\$1,279,630	\$17,553,379