



The Bus Transformation Project will create a **bold, new vision** and a **collaborative action plan** for the future of buses in the region

Together we
will identify the
role of bus,
regardless of
who operates
them, in our
region's future
and a roadmap
to get there.



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



Our region and mobility options continue to **evolve**, but the bus system has largely **stayed the same**.

Impetus for the Study

- **Buses are slow and getting slower**
 - Causing \$30 M increase in expenses
- **Fewer people are riding the bus**
 - 13% decline in the past 5 years
- **The bus operating model is not sustainable.**
 - Rising costs + declining ridership revenues = operating loss increases

These challenges require a *regional solution.*





It is time to re-think the region's
approach to buses and the role of
Metrobus in the system.

Bus faces **five core challenges** that will continue to grow unless changes are made



Meet changing
customer needs



Keep up with
changing technology



Coordinating
across region



Maintain
sustainable cost
structure



Deciding how
service is paid
for

Outcomes responds to five strategic questions



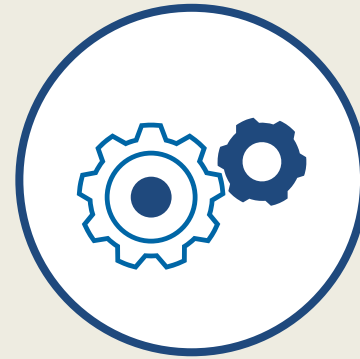
1. Role of buses in the region?



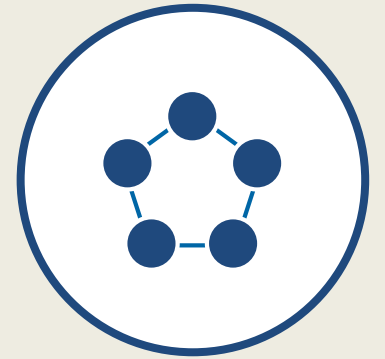
2. What services should Metrobus operate?



3. Regional commitment to bus?



4. What business functions should Metrobus provide?



5. Regional governance model?



Public and Stakeholder Engagement for the Bus Transformation Project

Stakeholder Engagement

WMATA Leadership Team

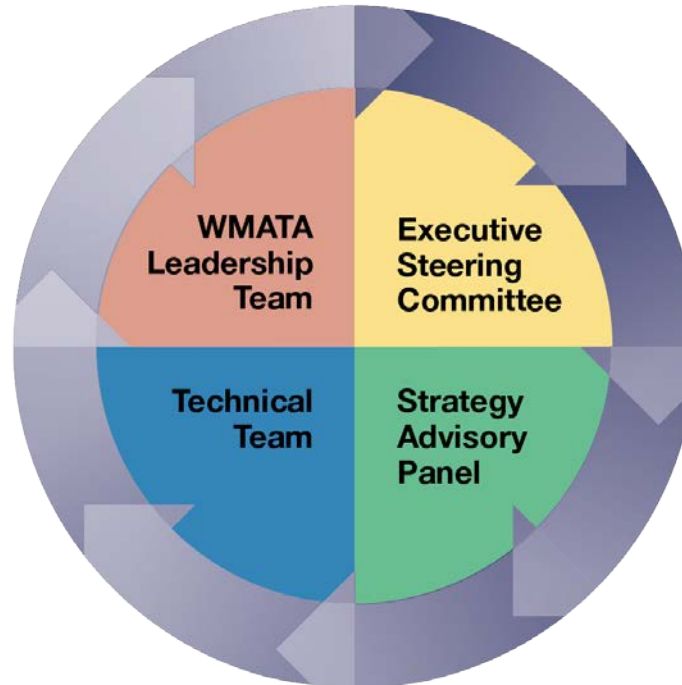
Decision makers within Metro manage evaluation that affects organization and operations.

- PM, Office of Planning
- Bus Planning
- Performance
- Communications
- Chief Operation Officers

Technical Team

Recognized discipline leaders within Metro and senior jurisdiction transit staff review technical and financial analysis.

- Specialized staff from planning, bus, and performance
- Senior transit staff from each jurisdiction



Executive Steering Committee

Recognized leaders closely involved with strategy development manage political risk and benefit to the region.

- Transportation thought leaders
- Business leaders
- Regional advocates
- Labor representatives

Strategy Advisory Panel

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

- Transportation and transit managers
- Citizen appointees
- Operator representatives
- Labor representatives
- Transit advocates

Engagement to Date

- 5,679 responses to survey
- 20 regional pop-up events
- 1 summit (140+ participants)
- 14 committee meetings
- 13 operator listening sessions
- 35+ stakeholder interviews
- 11 project briefings/meetings
- Over 696,000 social media impressions and 2,450 clicks





Public Survey Findings

About the Survey

The screenshot shows a survey interface with a green header bar containing navigation icons and the title "How Would You Invest?". Below the header, there are four vertical tabs: "WELCOME", "CURRENT TRAVEL", "TRAVEL PREFERENCES", and "BUDGETING ACTIVITY". The "BUDGETING ACTIVITY" tab is active, displaying a survey question and a grid of investment categories. The question asks how to invest a 20-coin budget in the Washington area. The grid has five columns and two rows of categories. The top row categories are "More direct buses (fewer transfers)", "More frequent service", "Longer hours of operation", and "More reliable and faster service". The bottom row categories are "Less confusing system", "Safer, more secure buses and stops", "Affordable fares", and "Better app for info and/or payment". A stack of 6 coins is shown at the bottom left, with a "6" below it. The "Next Task" button is visible in the top right corner.

Category	Investment (Coins)
More direct buses (fewer transfers)	5
More frequent service	1
Longer hours of operation	1
More reliable and faster service	5
Less confusing system	0
Safer, more secure buses and stops	0
Affordable fares	0
Better app for info and/or payment	0

- Open from September 17, 2018 to November 17, 2018
- **5,679 responses**
- **20 pop-up events** helped ensure a diverse sample of respondents.
- The survey asked questions about how people make their travel choices and how they would like to see bus service improved.

About the 5,679 Respondents*

16%

of survey respondents are low-income



45%

of survey respondents are not white



66%

of survey respondents are between the ages of 25-54



Low-income defined as living in a household with income less than \$30,000 a year

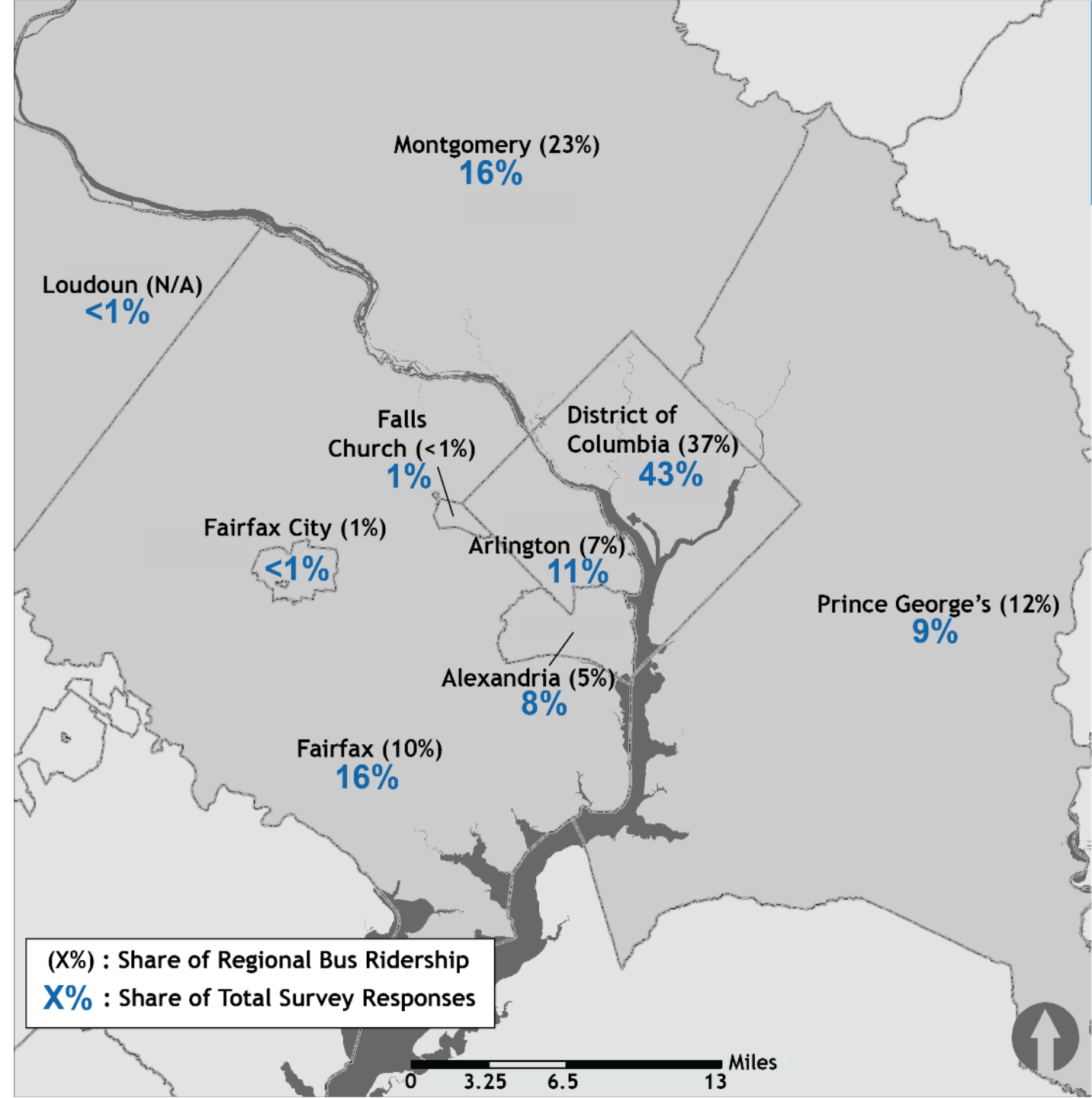
* All results presented are only for the subset of respondents who answered the question at hand.

Respondents by Jurisdiction

Jurisdictions with the most survey respondents:

- District of Columbia (43%)
- Montgomery and Fairfax Counties (16% each)
- Arlington County (11%)
- Prince George's County (9%)
- Alexandria (8%)

These percentages more closely reflect each jurisdiction's portion of bus ridership than its total population.



More about the Respondents

78%

ride public transit at
least
once per week



68%

ride local bus at least
once per week



1 out of 5
reported they use
Uber, Lyft, or other
similar ride-hailing
companies at least
once per week



Current Travel Choices

Top 3 reasons for riding local bus:

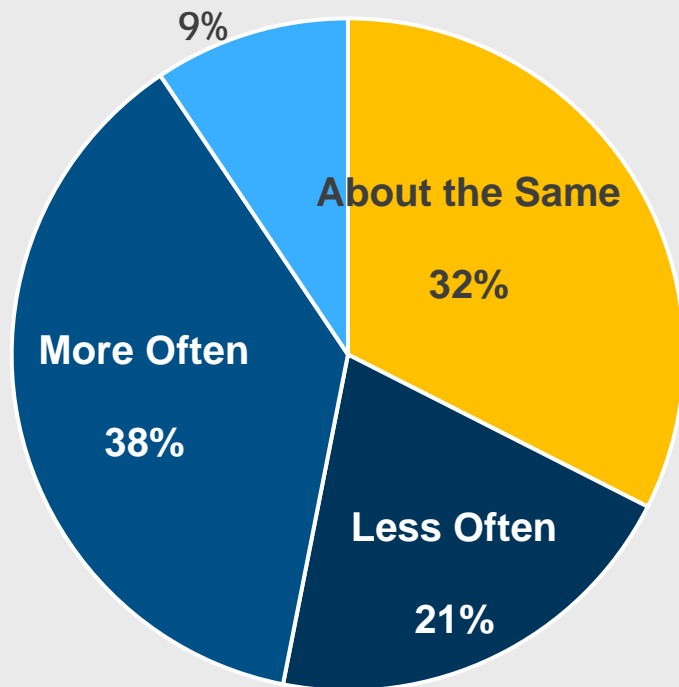
1. It is the closest transit option to my home or work.
2. It is the most affordable option.
3. It is easy to use.

Top 3 barriers to riding local bus:

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

Respondents were asked if they ride more often, less often, or about the same compared to 3 years ago.

Not Applicable/
Didn't Live Here



80%

people who ride local buses at least once per week said they are riding the bus **MORE** than they did three years ago



people who ride **less than once a week** said they ride **LESS** than three years ago

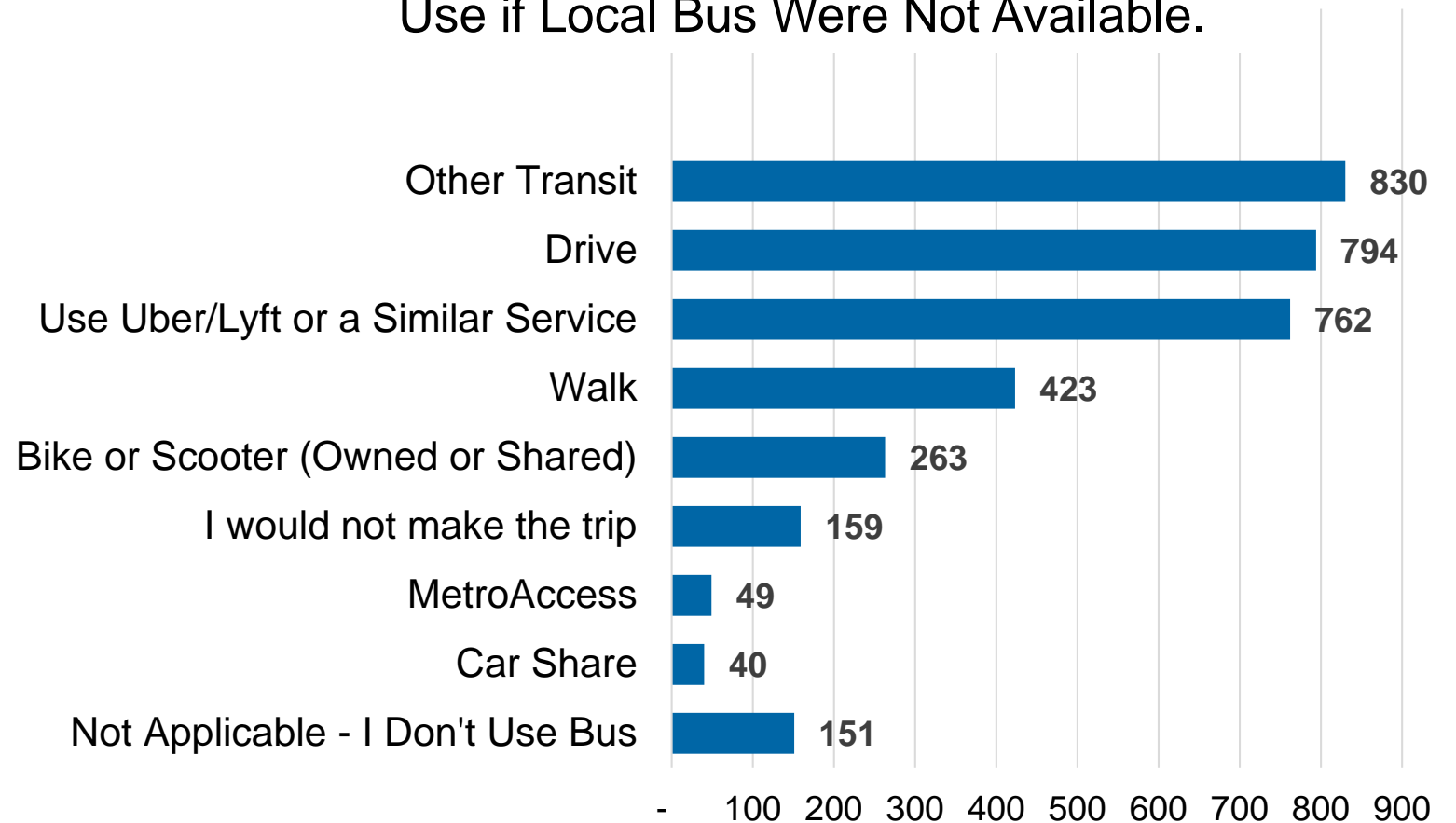
67%

- Both frequent and non-frequent riders cited a **change in home or work location** as the most common reason for a change.
- **Perceptions of bus reliability vary considerably:** Changes in bus reliability was cited at the same rate both for those who ride more frequently and those who ride less frequently!

If local bus were not available...

- Low-income frequent bus riders **more likely** (34% vs. 20%) to say they **would use Lyft, Uber, or a similar service.**
- **Fewer non-white and frequent bus riders** (21% vs. 28%) **said they would drive.**
- **Over half (57%) of bus service gaps** identified by respondents were **within the same jurisdiction.**

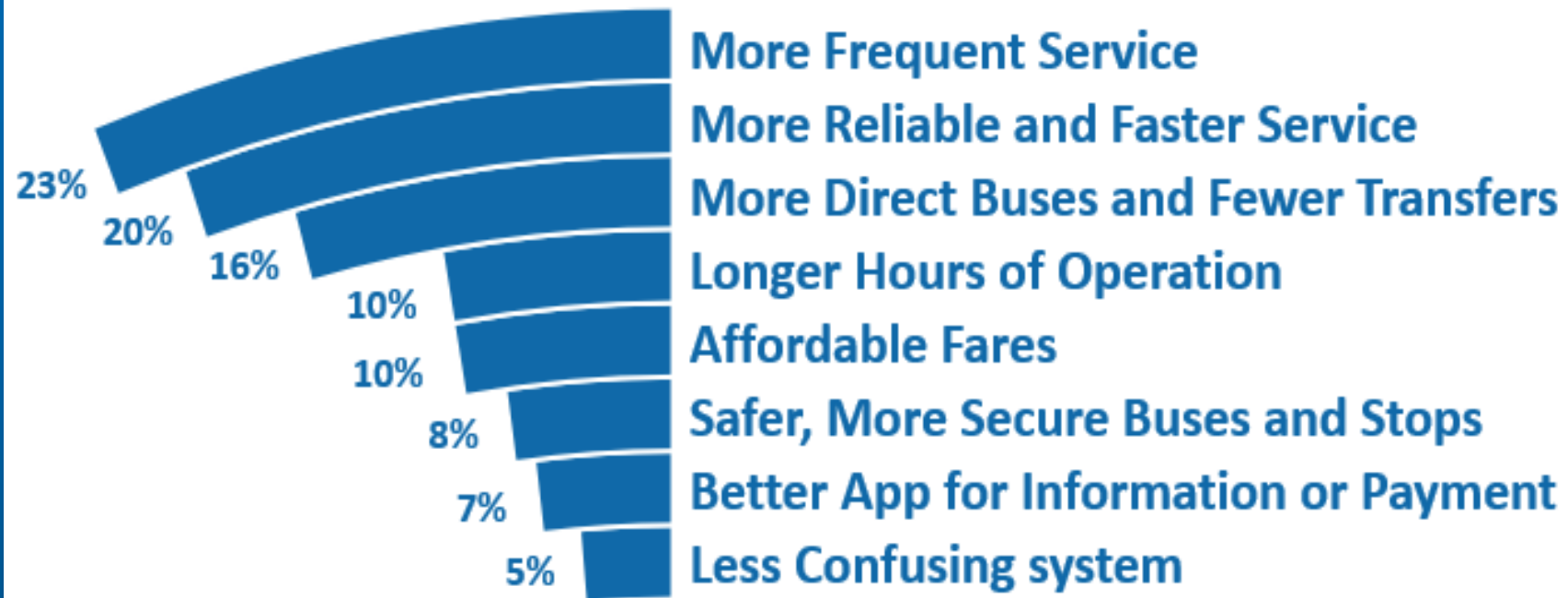
Modes Respondents Say They Would Use if Local Bus Were Not Available.



Investment Priorities



Respondents divided 20 coins between the eight categories, giving higher amounts to their highest priorities for investment.



- Top three choices for investment (receiving 60 percent of all coins) were **consistent across the region and demographic groups**.
- Frequent, occasional, and non-riders **had the same top three investment choices**.
- **Affordable fares** were a higher priority among low-income and non-white respondents, and frequent riders.

Key Survey Findings Regarding Strategic Questions

- Respondents believe that bus should be accessible to all and should also serve specialized trips
- Residents in Alexandria and Prince George's County were more likely to cite "hours of service" as a barrier to riding the bus
- Respondents strongly supported preferential treatment for bus on roadways



1. Role of buses in the region?



3. Regional commitment to bus?



Next Steps

Next Steps

We are here

Set **strategic direction**

November

Define core strategic considerations for bus in the region and understand stakeholder perspectives on where region should land

Develop draft strategy

Nov. to Spring

Conduct focused analysis to develop draft strategy, including high-level understanding of key costs and benefits

Align on final strategy

Spring-Summer

Refine strategy and define expected outcomes

Develop 10-year roadmap

Summer - Fall

Identify specific actions required to achieve strategy vision in a 1, 3, 5, and 10-year action plan



Q&A and Discussion