

NORTHERN VIRGINIA TRANSPORTATION AUTHORITY**MEMORANDUM**

FOR: Chair Phyllis J. Randall and Members,
Northern Virginia Transportation Authority

FROM: Monica Backmon, CEO, NVTA

DATE: November 10, 2021

SUBJECT: Travel Trends Update

1. Purpose.

To inform the Northern Virginia Transportation Authority (NVTA) on recent travel trends related to the ongoing transportation impacts of the COVID-19 pandemic.

Background.

NVTA staff is monitoring travel trends in Northern Virginia, comparing highway and transit travel metrics from 2020 and 2021, with corresponding weeks and months in 2019. NVTA staff has so far presented three of these snapshot analyses, at the June, July, and September 2021 Authority meetings.

This update features findings from a recent regional survey by the Greater Washington Partnership, together with insights on transit ridership trends from transit agency managers in Northern Virginia. The analysis of highway travels covers traffic volumes and travel speeds for the afternoon peak periods.

The objectives of these analyses are to gain a better understanding of such trends, and to identify whether they are temporary or may be more permanent. This knowledge will enhance NVTA's long-range transportation planning efforts, and may influence project-funding recommendations in future Six Year Programs.

2. Commuting to work/Telecommuting

Census Bureau has been conducting a special online survey to gauge socio-economic impacts due to COVID-19 (<https://www.census.gov/data/experimental-data-products/household-pulse-survey.html>). The last data point is in July 2021, which showed about 44% of workers in Washington D.C. Metro area worked from home. This is highest among its 14 large peer metro areas in the United States, but with a downward trend since April of this year (April – 51%).

In the third iteration of the Capital COVID-19 Snapshot survey

(<https://greaterwashingtonpartnership.com/capital-covid-snapshot-2021/>), the Greater Washington Partnership received responses from 164 employers, representing nearly 300,000 workers in the Baltimore-Washington-Richmond region. Following are the key findings:

- a. Less than half of employees are expected to be back in the office on a typical workday this fall. By summer next year, employers say they expect that number will grow to about two-thirds.
- b. On mode of transportation to commute to office next year, about 56 percent of employers think workers will drive more. Only 16 percent of employers expect an increase in the use of public transit.

3. Highway travels

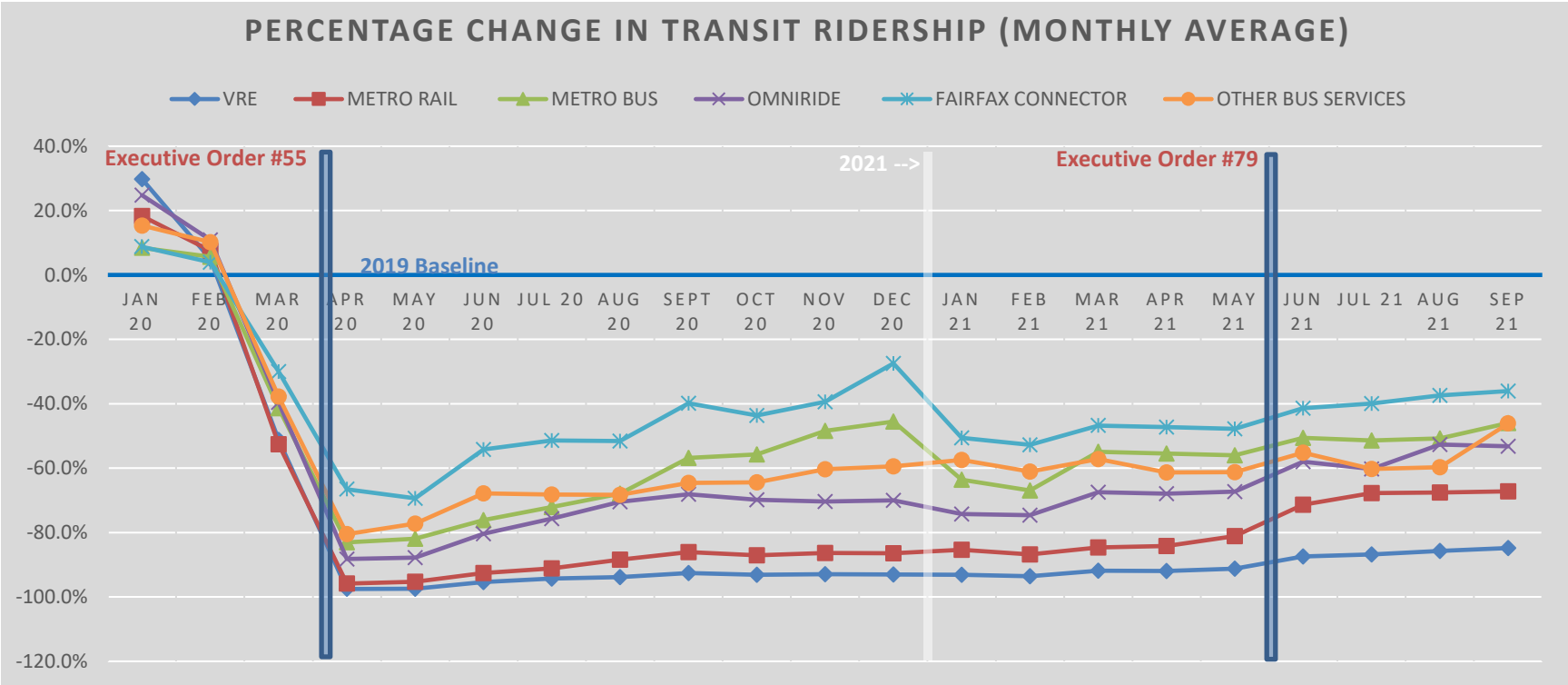
Volumes on freeways and major arterials in Northern Virginia are close to pre-pandemic level. In October 2021, volumes were within 95% of pre-COVID conditions. Travel speeds in October 2021 were about 4% faster than pre-COVID conditions.

4. Transit ridership:

NVTA staff invited managers of transit service providers in Northern Virginia to provide their insights on ridership trends. Below are some highlights:

- a. Commuter ridership has increased due to the number of employees returning in-person to the Pentagon, but Washington, DC-based routes are still lagging.
- b. Fewer people are utilizing informal ride-sharing (slugging). That has positively impacted the use of transit as people are concerned about riding in private autos with unknown persons.
- c. For Loudoun County Transit, commuter services historically have had more riders than local fixed routes. This trend has been reversed, where local routes are averaging 87 percent, and commuter services just 10 percent of pre-COVID ridership.
- d. Ridership declined on the King Street Trolley in Old Town Alexandria due to reduced tourism levels in the city. Pre-COVID, this service contributed to 20-25 percent of systemwide ridership during summer and fall.

The following chart shows percentage changes in average monthly ridership data from all transit providers in Northern Virginia, comparing data from 2020 and 2021 to the 2019 baseline. In this update, the last month of data reported is September 2021. Ridership for all systems has been trending upward since February 2021. The category “Other Bus Services”, which includes ART, DASH, CUE, and Loudoun County Transit system; showed largest gain between August and September of this year. This is coincident with DASH’s free-fare and expanded services starting from September 5.



5. **Next steps.** NVTA staff will continue this trend analysis to track emerging travel patterns, as the region is opening up to socio-economic activities.