

NORTHERN VIRGINIA TRANSPORTATION AUTHORITY

MEMORANDUM

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

FROM: Monica Backmon, Chief Executive Officer

DATE: December 1, 2022

SUBJECT: Travel Trends Update

- 1. Purpose:** To inform the Northern Virginia Transportation Authority (NVTA) on recent travel trends since the onset of the COVID-19 pandemic.
- 2. Background:** NVTA staff is monitoring travel trends in Northern Virginia, comparing highway and transit travel metrics from 2020, 2021, and 2022 with corresponding weeks and months in 2019. NVTA staff has so far presented seven of these snapshot analyses at the June, July, September, November (2021), and March, June, and September (2022) Authority meetings.

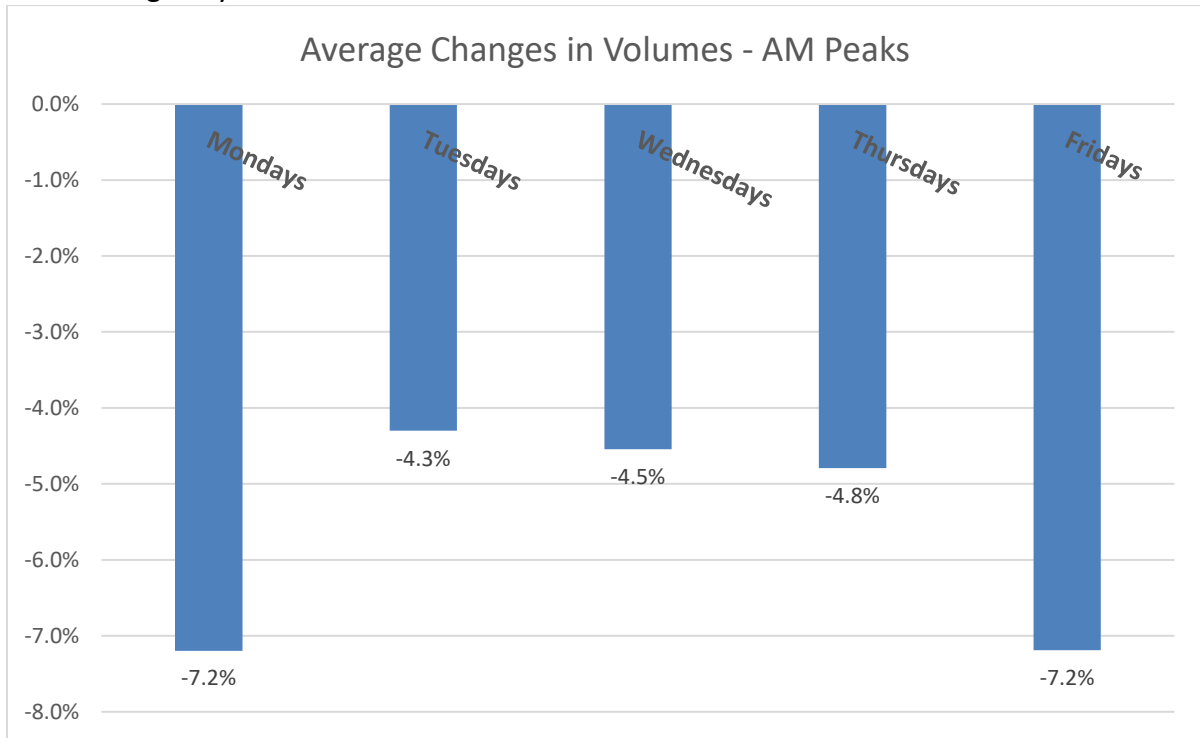
This update features staff analyses with Virginia Department of Transportation (VDOT) highway traffic volumes in Northern Virginia, in addition to regular updates on transit ridership for all public transit systems in Northern Virginia (average monthly). In our last update at the September Authority meeting, we presented data analysis through June 2022. This report updates the analysis through September 2022.

The objective of these analyses is 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 ongoing long-range transportation planning efforts and may influence project funding recommendations in future Six Year Program update cycles.

3. Highway Travel Trends by Day-of-the-Week:

During the height of the pandemic in 2021, more than 50% workers worked from home in Washington D.C. Metro area according to Census Bureau's pulse household survey (<https://www.census.gov/data/experimental-data-products/household-pulse-survey.html>). According to a recent State of the Commute Survey by National Capital Region's Transportation Planning Board (TPB), "on a typical workday, 1.5 million, or 44% of all workers in the D.C. region are now teleworking". With this high rate of teleworking and flexible office schedules, media reports suggest "hybrid workers heading to the office midweek and staying home Mondays and Fridays are taxing the region's transportation network in new ways....". To check this trend in Northern Virginia, staff have analyzed AM Peak traffic volumes. While overall highway travels are still lower than pre-pandemic levels, comparisons between 2019 and 2022 suggest that mid-week AM peak periods are closer to pre-pandemic levels than Mondays or Fridays (see Chart 1 below).

Chart 1: Highway Traffic Volumes



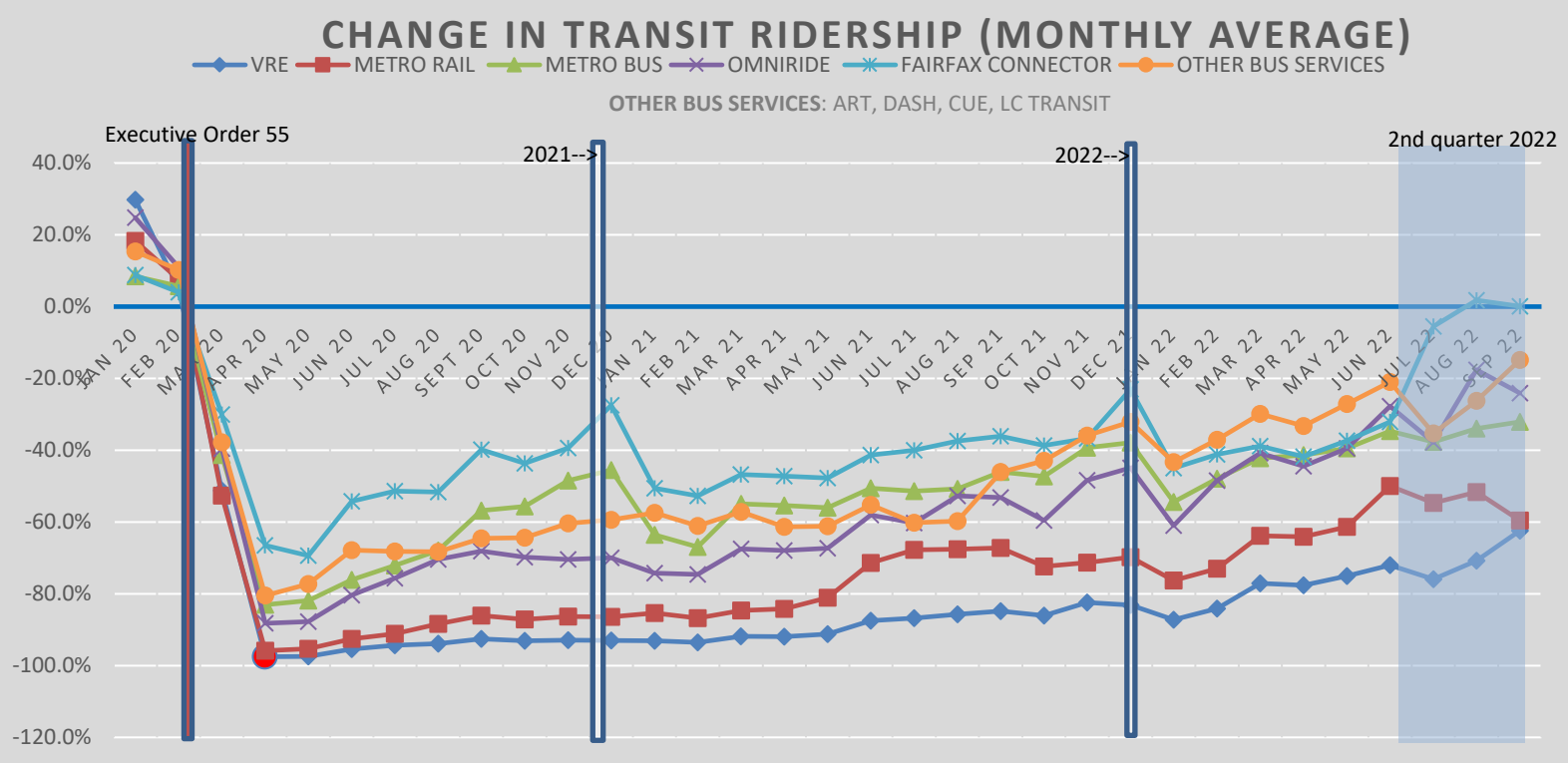
Source: VDOT – Virginia COVID-19 Traffic Trend Tool -

<https://public.tableau.com/app/profile/simona.babiceanu/viz/COVID-19VirginiaTrafficVolumes/ByLinkidDir>

4. Transit Ridership:

In the third quarter of 2022, local bus services have recovered substantially from the pandemic-induced ridership declines (see Chart 2 below). Among 'Other Bus Services', DASH and CUE continued to report ridership that surpassed the pre-pandemic level. City of Fairfax's CUE service has reported an average ridership 30% above pre-pandemic. This surge in demand may be attributable to the free-fare program, returning George Mason University (GMU) students, and a cut-back in GMU-sponsored shuttle services during pandemic (CUE staff is awaiting results of an on-board survey in November). Another notable trend is declining Metrorail ridership and contrasting upward trend for VRE in this period. This may be explained with Metrorail station closures south of Reagan National Airport, VRE low-fare services for the affected Metrorail customers, and VRE fare-free September campaign.

Chart 2. Transit Ridership



Source: Average monthly ridership data from DRPT and NVTC.

- 5. **Next Steps:** NVTA staff will continue this trend analysis to track emerging travel patterns, as the region’s travelers continue to adjust their travel choices/behaviors. In particular, we will be monitoring transit usage as more systems are offering incentives, opening of Metrorail Silver Line Phase 2 services to Dulles International Airport and beyond, and highway volumes with office occupancy rates.