

NORTHERN VIRGINIA TRANSPORTATION AUTHORITY**MEMORANDUM**

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

FROM: Harun Rashid, Regional Transportation Modeler

DATE: June 1, 2023

SUBJECT: Travel Trends Update

- 1. Purpose:** To inform the Northern Virginia Transportation Authority (NVTA) on Northern Virginia transit, highway, and other travel trends.
- 2. Background:** NVTA staff is monitoring travel trends in Northern Virginia comparing highway and transit travel metrics from 2020, 2021, 2022, and 2023, with corresponding weeks and months in 2019. NVTA staff has so far presented nine of these snapshot analyses quarterly to the Authority since June 2021.

This update features staff analyses of air travel demands for all three regional airports in addition to regular updates on highway traffic volumes and transit ridership. In our last update at the March Authority meeting, we presented data analysis through December 2022. This report updates the analysis through March 2023.

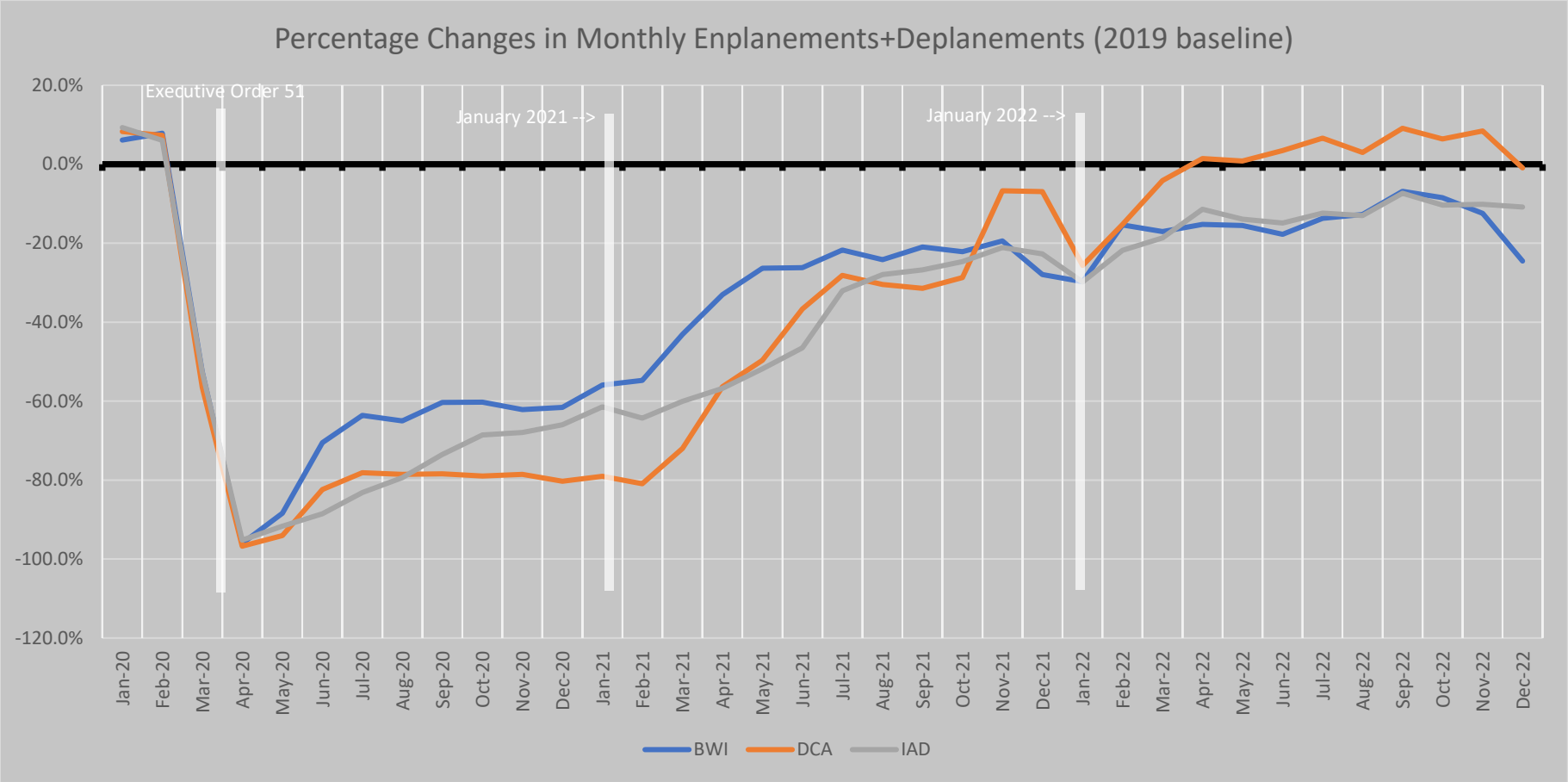
The objective of these analyses are to gain a better understanding of and to identify the effects on travel patterns after the COVID-19 pandemic. This knowledge will enhance NVTA's transportation planning efforts and may influence project-funding recommendations in future Six Year Program update cycles.

- 3. Air Travel Trends:** Demands for air travel are an indicator of economic activities and impact ground access conditions on the multimodal transportation network. Staff has analyzed enplanement/deplanement numbers at all three major airports (Reagan National (DCA), Dulles International (IAD), and Baltimore/Washington International (BWI)) to identify trends since the onset of COVID-19 pandemic. It appears air travel at Reagan National Airport has reached, and in some months surpassed, pre-pandemic levels since summer of last year (Chart 1).
- 4. Highway Travel Trends:** In the first quarter of 2023, (January – March) on the third-year anniversary of governor's stay-at-home Executive Order #51 (March 12, 2020), traffic volumes (afternoon PM peak period) on Northern Virginia's highways were on average 6% below pre-pandemic level (Chart 2). Corresponding travel speeds were on average 7% above.
- 5. Transit Ridership:** In this same period, OmniRide ridership experienced a sharp decline due to a service strike in February/March. CUE, DASH, and Fairfax Connector continued their

strong recoveries with ridership above pre-pandemic level (CUE and DASH numbers are grouped with ART/Loudoun County Transit in OTHER BUS SERVICES). VRE and Metrorail ridership were also on upward trends (Chart 3).

- 6. 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, staff will be monitoring transit usage as more systems are offering incentives and enhanced services, along with highway volumes and office occupancy rates.

Chart 1: Changes in passenger enplanements and deplanements



Source: MWCOG-TPB Continuous Airport System Planning (CASP) Program.

Chart 2: Traffic volumes on highways

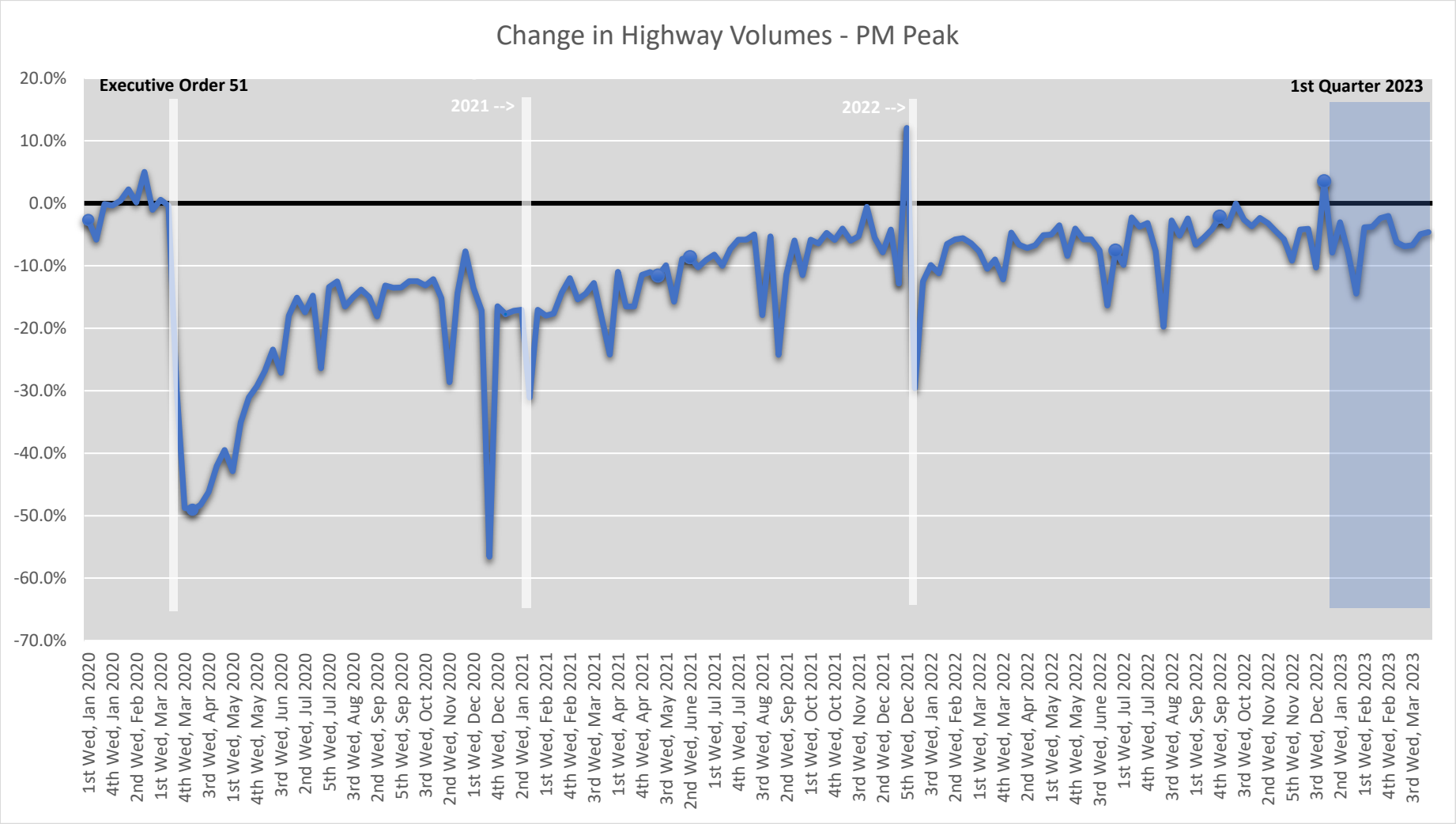
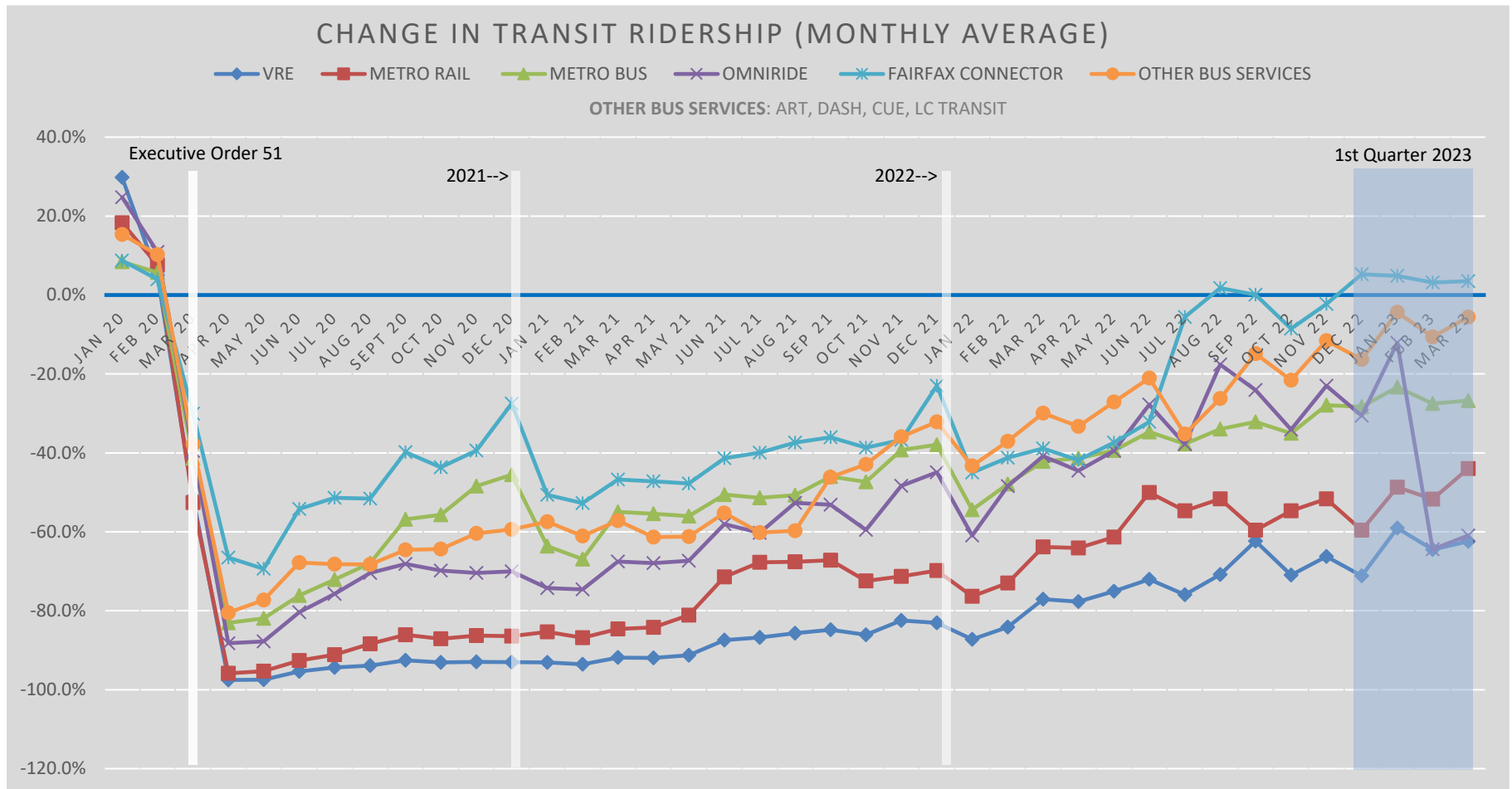


Chart 3: Transit ridership



Source: Average monthly ridership data from DRPT and NVTC.