

Where We've Been and Where We're Going

Transit Trends and the Year Ahead

Kevin Quinn, Administrator
December 10, 2020

Agenda

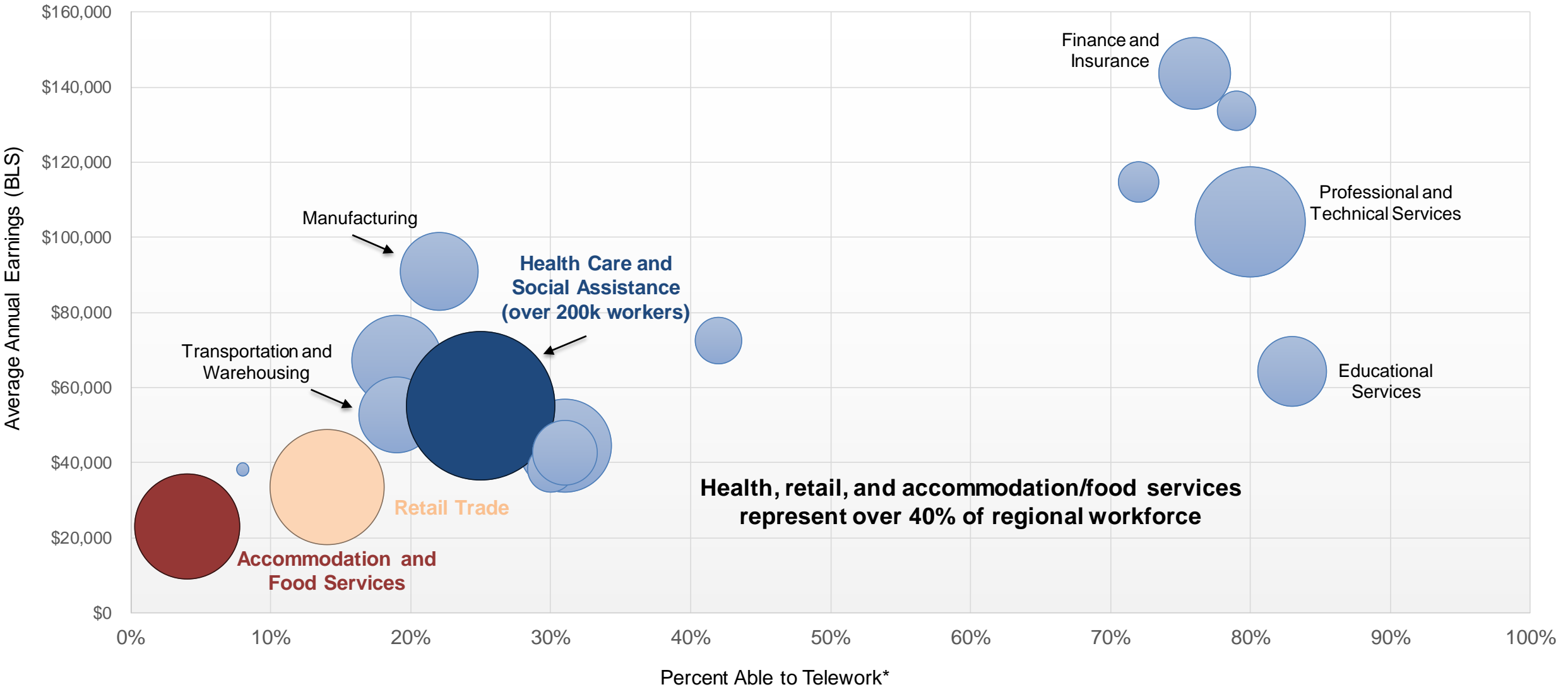
- Trends in Transit
- Service and Ridership
- Project Updates



Trends in Transit



Baltimore Region Employment, Earnings, and Ability to Telework



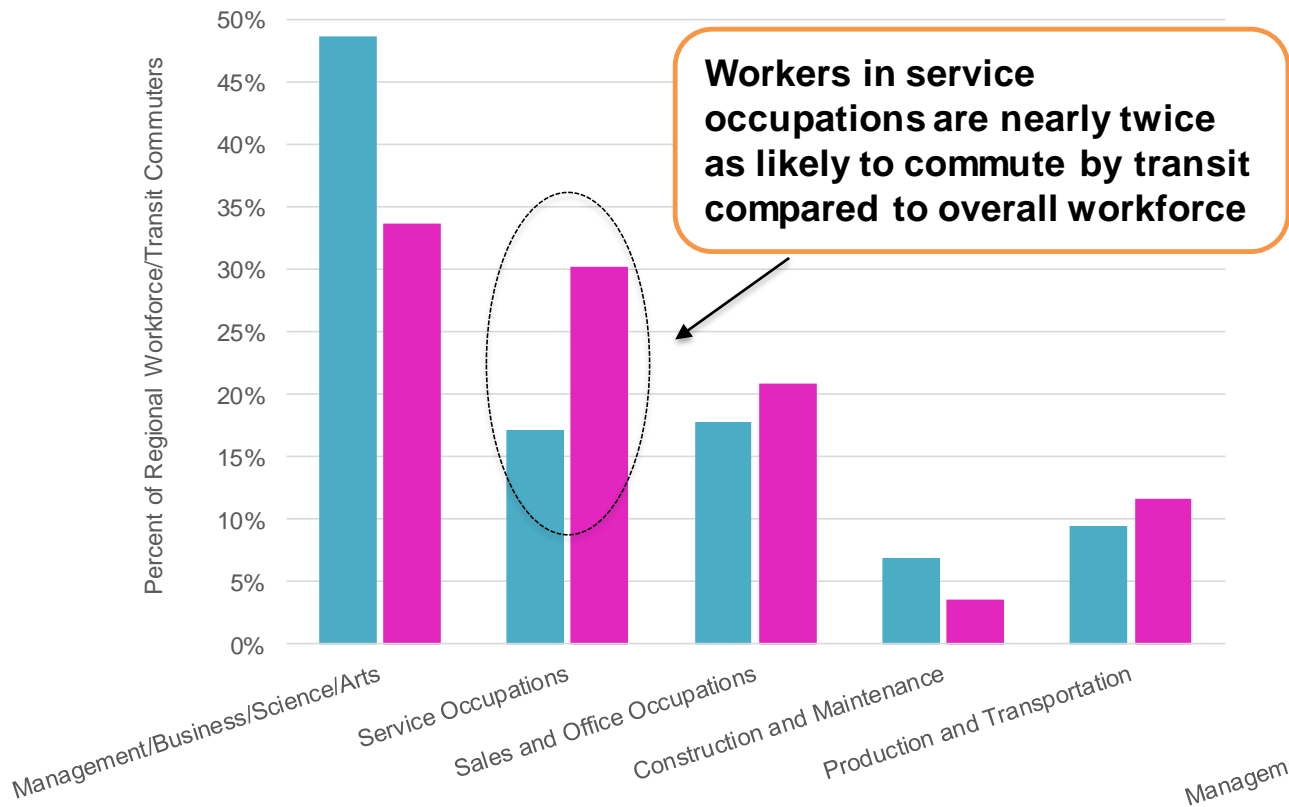
*Estimates derived from Dingel and Meiman, *How Many Jobs Can Be Done at Home?*, NBER April 2020

Transit Use by Occupation

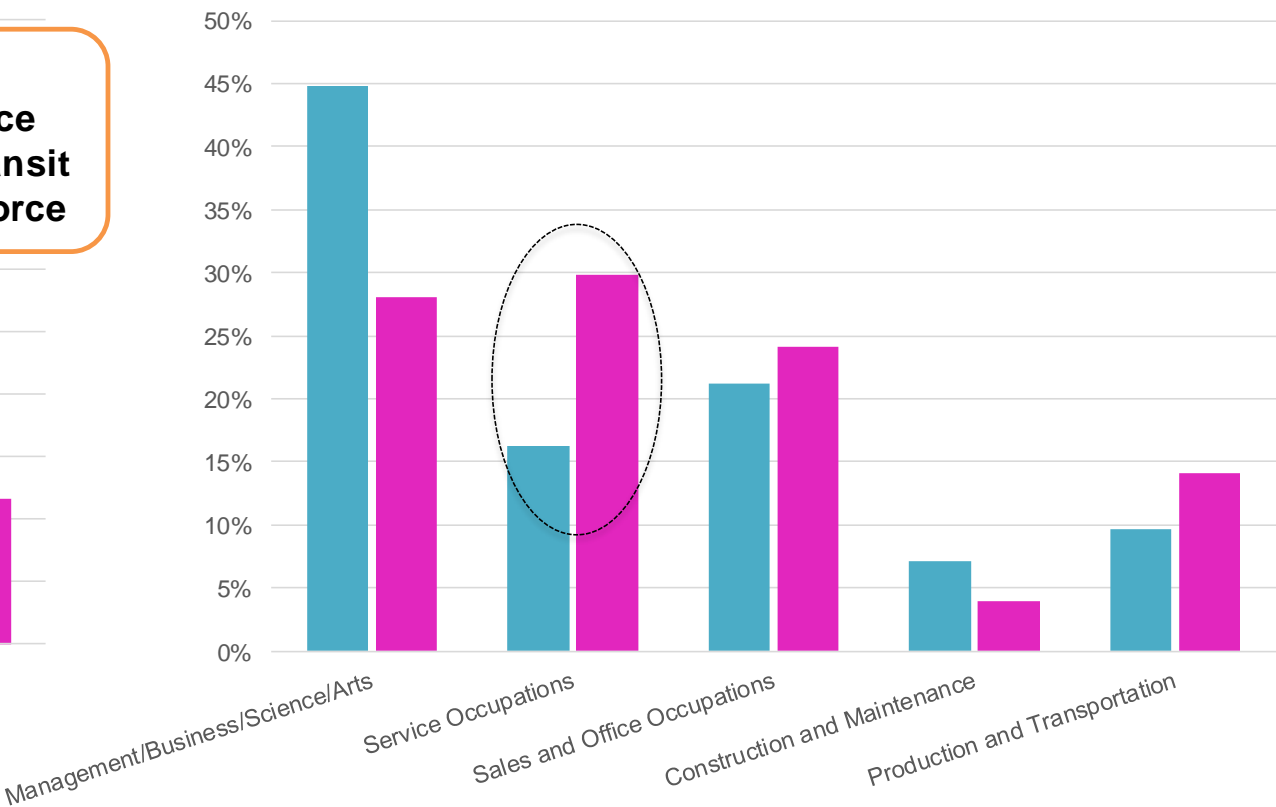
- Transit commuters are disproportionately likely to work in service occupations
 - Includes healthcare support (e.g. nurses) and food service workers

Baltimore City

Overall Workforce Transit Commuters



Baltimore Region

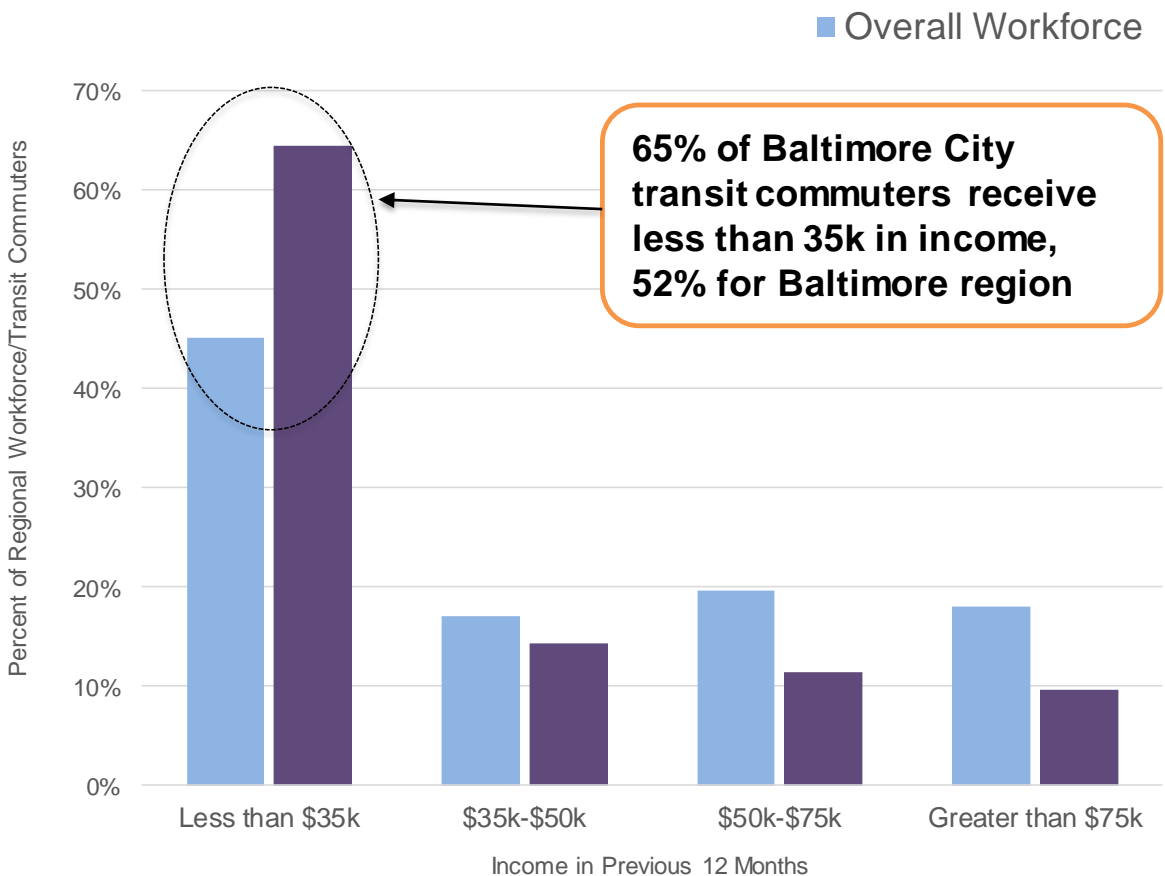


Source: American Community Survey 5-Year Estimates, 2018

Transit, Income, and Employment

- Transit commuters are disproportionately low-income relative to overall workforce
- Nearly two-thirds of Baltimore City transit commuters receive less than \$35k in income, over half for region

Baltimore City



Baltimore Region

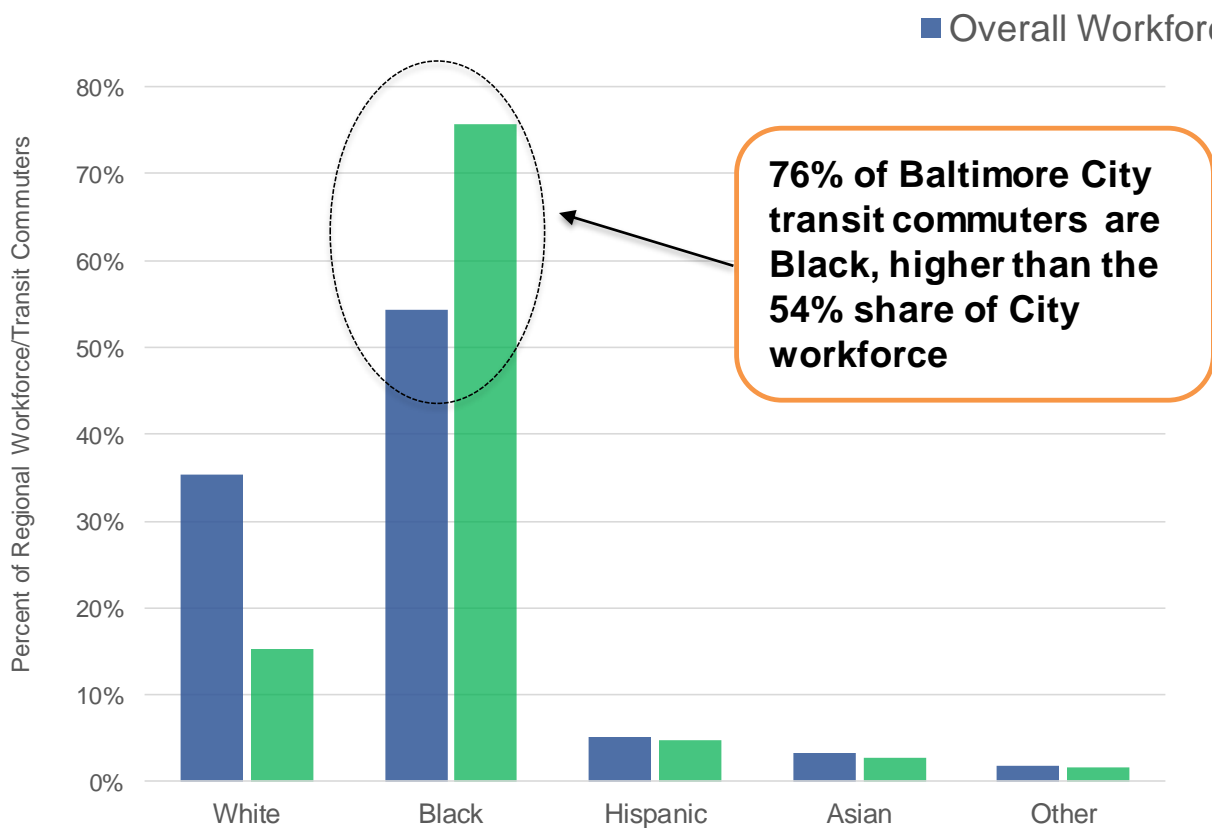


Source: American Community Survey 5-Year Estimates, 2018

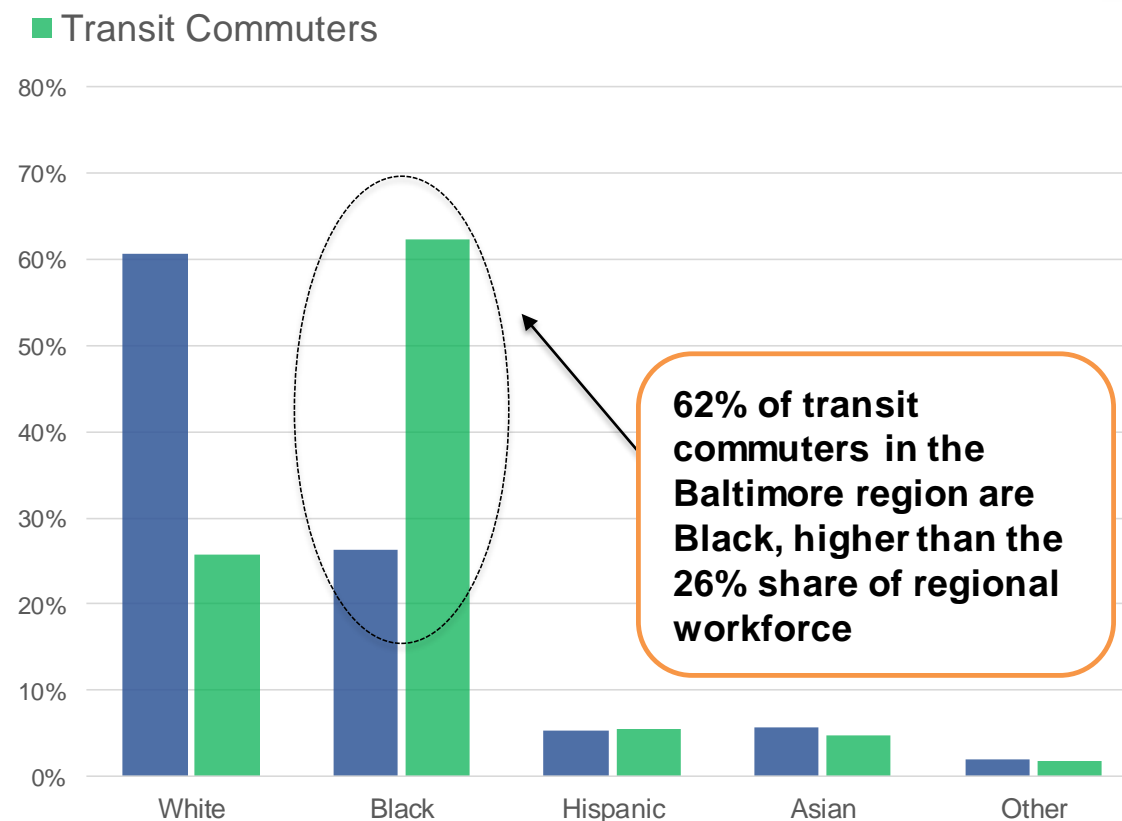
Transit Use by Race/Ethnicity

- Transit commuters are disproportionately Black relative to overall workforce
- Approximately three-quarters of Baltimore City transit commuters are Black, over 60% for region

Baltimore City



Baltimore Region



Source: American Community Survey 5-Year Estimates, 2018

The Funding Crisis is Real

- Transit agencies throughout the US are looking at a budget shortfall **nearly 2,000% greater than that experienced during the Great Recession**
- According to an APTA survey, 8 in 10 large agencies are considering service cuts and/or delaying, deferring, or cancelling capital projects to close their budget gaps

‘Existential Peril’: Mass Transit Faces Huge Service Cuts Across U.S.

Reeling from the pandemic, transit agencies are grappling with drastic reductions in ridership and pleading for help from Washington.

Without Emergency Funding, Doomsday Cuts Threaten to Upend Transit Riders’ Lives

top Washington Post

Metro considers buyouts to stave off 1,400 layoffs due to pandemic-created financial crisis

To cut even more, Wiedefeld said, the transit agency plans to offer buyouts of \$15,000 to retirement-eligible employees. Metro estimated there ...



NEWS OPINION INVESTIGATIVE REPORTS THE FLY SPORTS

NEWS

Bay Area Public Transit Agencies Struggle to Survive the Economic Toll of the Covid-19 Pandemic

DAILY NEWS

SALE!
\$1/6 mths

LOG IN

NEW YORK

‘An end to the New York way of life’: MTA proposes catastrophic service cuts amid COVID-19 budget crunch

The New York Times

Sections

The Washington Post
Democracy Dies in Darkness

Get 1 year for \$29

Transportation

From Metro funding crisis to telework’s rise, transportation is in historic turmoil

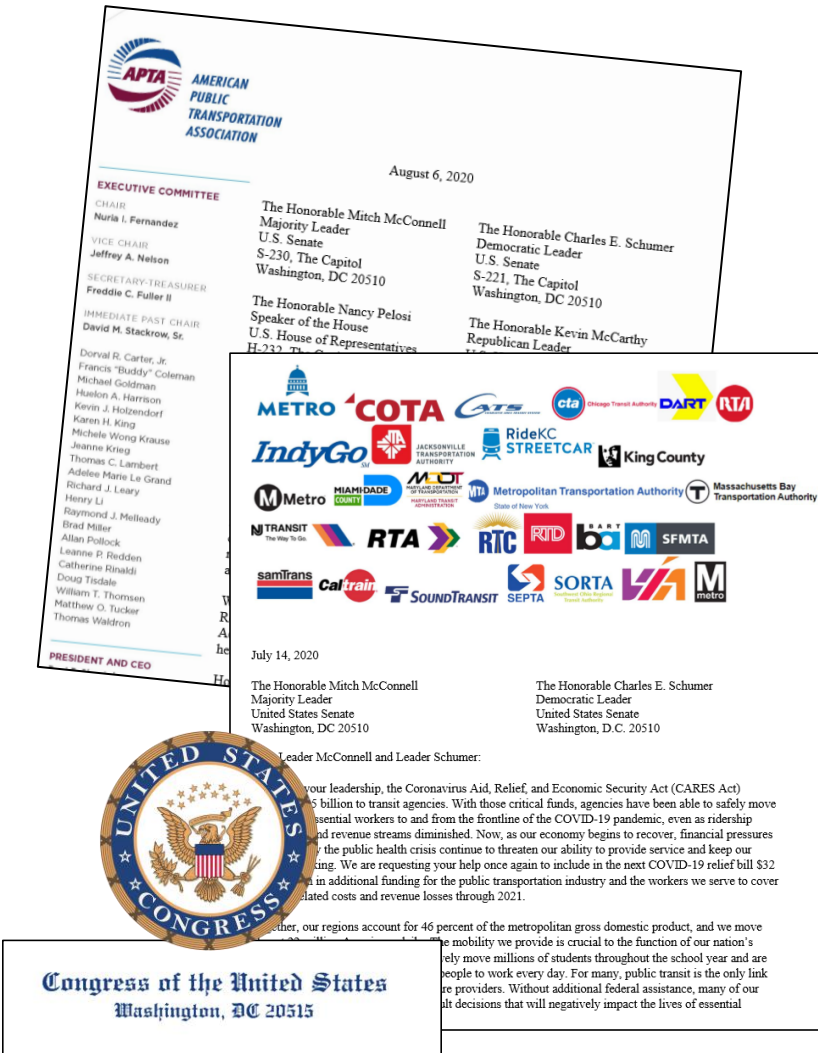
The Coronavirus Outbreak >

LIVE

Latest Updates Maps and Cases Vaccine Tracker F.A.Q. Markets & Economy

Public Transit Officials Fear Virus Could Send Systems Into ‘Death Spiral’

MDOT MTA Advocacy



- MDOT MTA has been an active advocate for additional federal funding for transit including:
 - A July 6, 2020 joint letter with 26 other transit CEOs to Congressional leadership requesting funding and highlighting the consequences of failing to provide funding for transit
 - An August 6, 2020 joint letter with APTA and 23 other commuter rail CEOs to Congressional leadership requesting additional funding
 - A September 23, 2020 joint letter with more than 70 organizations to the Maryland Congressional Delegation in support of \$32 billion in additional transit funding
 - APTA press conferences with transit executives
- We need your help!



Service and Ridership

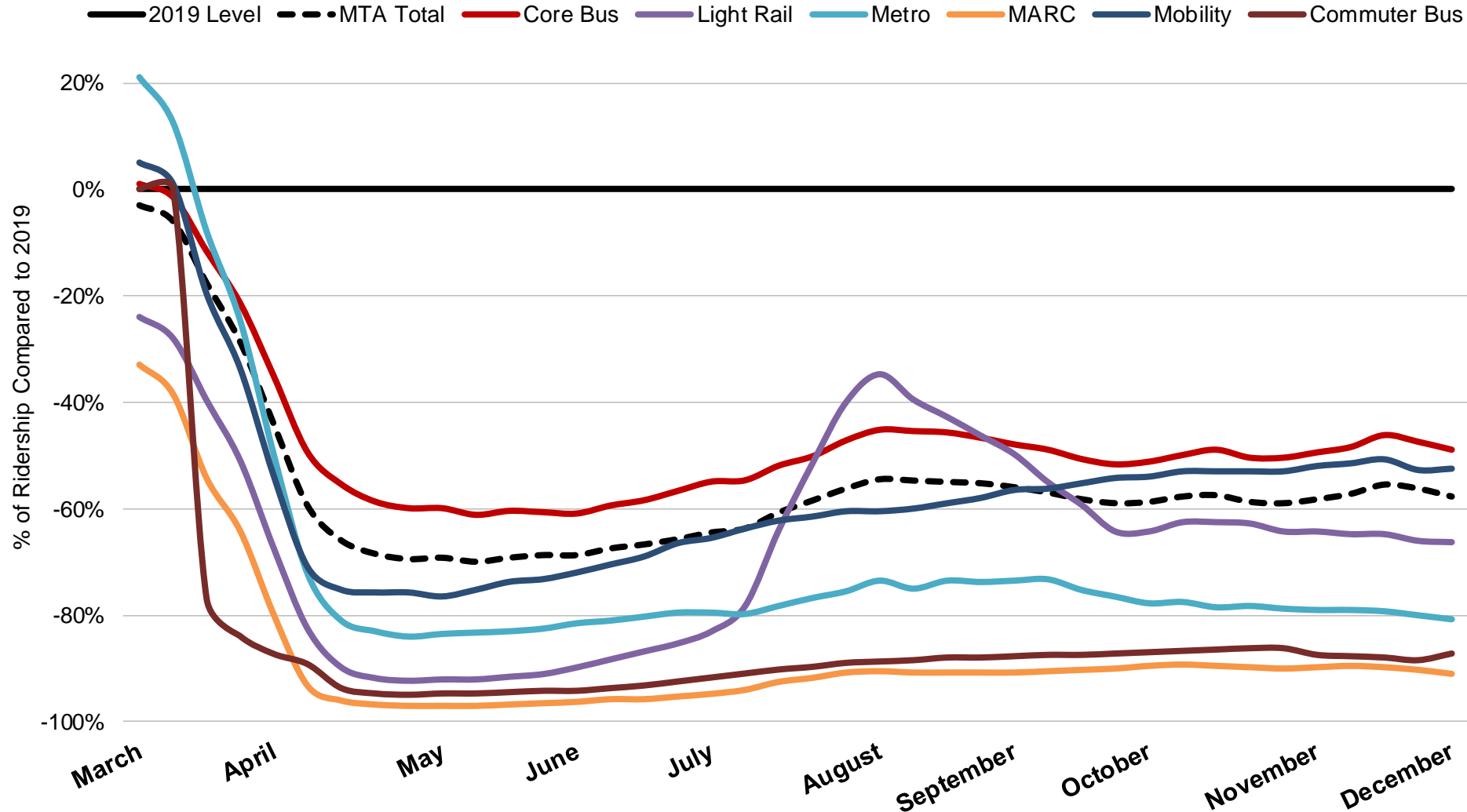


Service Change Decision

- You spoke, we listened
 - Public comment and feedback from local jurisdictions, elected officials
- We looked at the data
 - Ridership/passengers per trip for commuter services vs core service
 - Vehicle access, essential workplaces
- Initial proposal was withdrawn
 - No reductions in core service
 - No impacts to Mobility service area

Ridership by Transit Mode

Ridership Compared to Previous Year (Rolling 4-Week Averages)

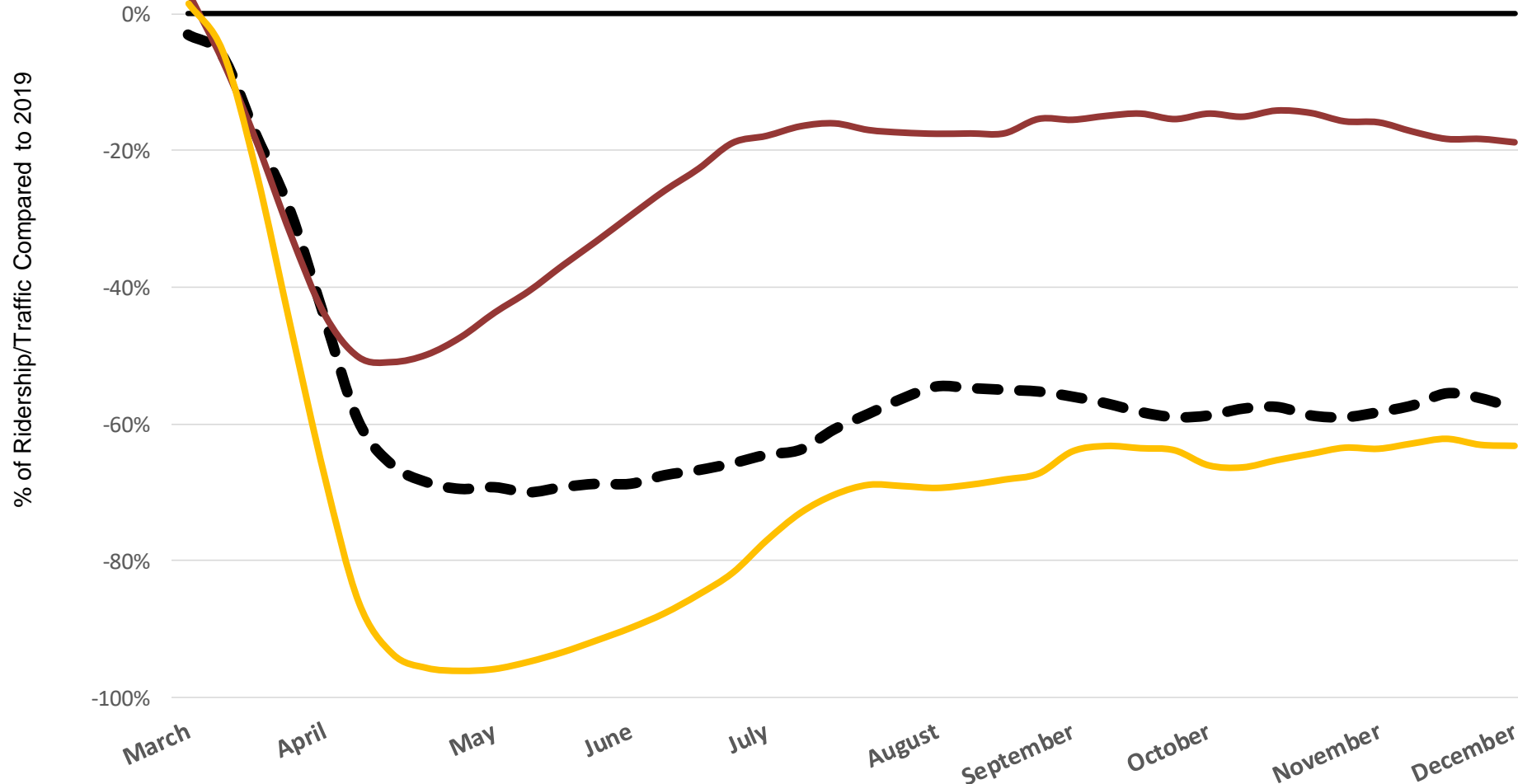


- Overall ridership is down approximately 60% as of early December
 - Core Bus down 50%
 - Mobility down 55%
 - Light Rail down 65%
 - Metro down 80%
 - Commuter Bus down 87%
 - MARC down 90%

Transit vs Other MDOT Modes

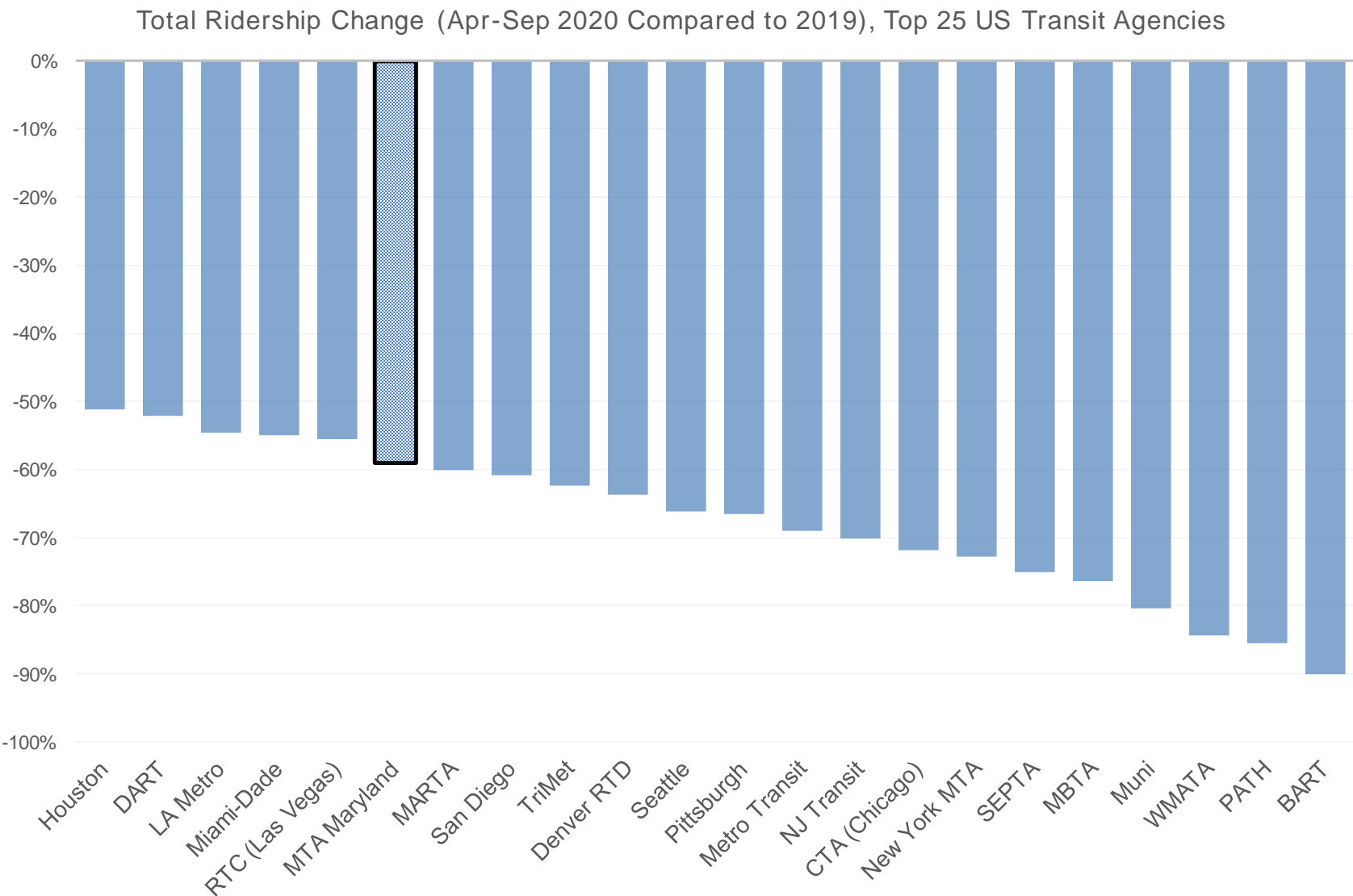
Ridership/Traffic Compared to Previous Year (Rolling 4-Week Averages)

— 2019 Level - - MTA Ridership — Statewide Traffic Volume (SHA) — BWI Passenger Traffic



- Statewide traffic volume has recovered faster than transit ridership
 - Stabilizing around 15-20% of pre-pandemic levels compared to 60% for transit
- Long term implications for mode shift?

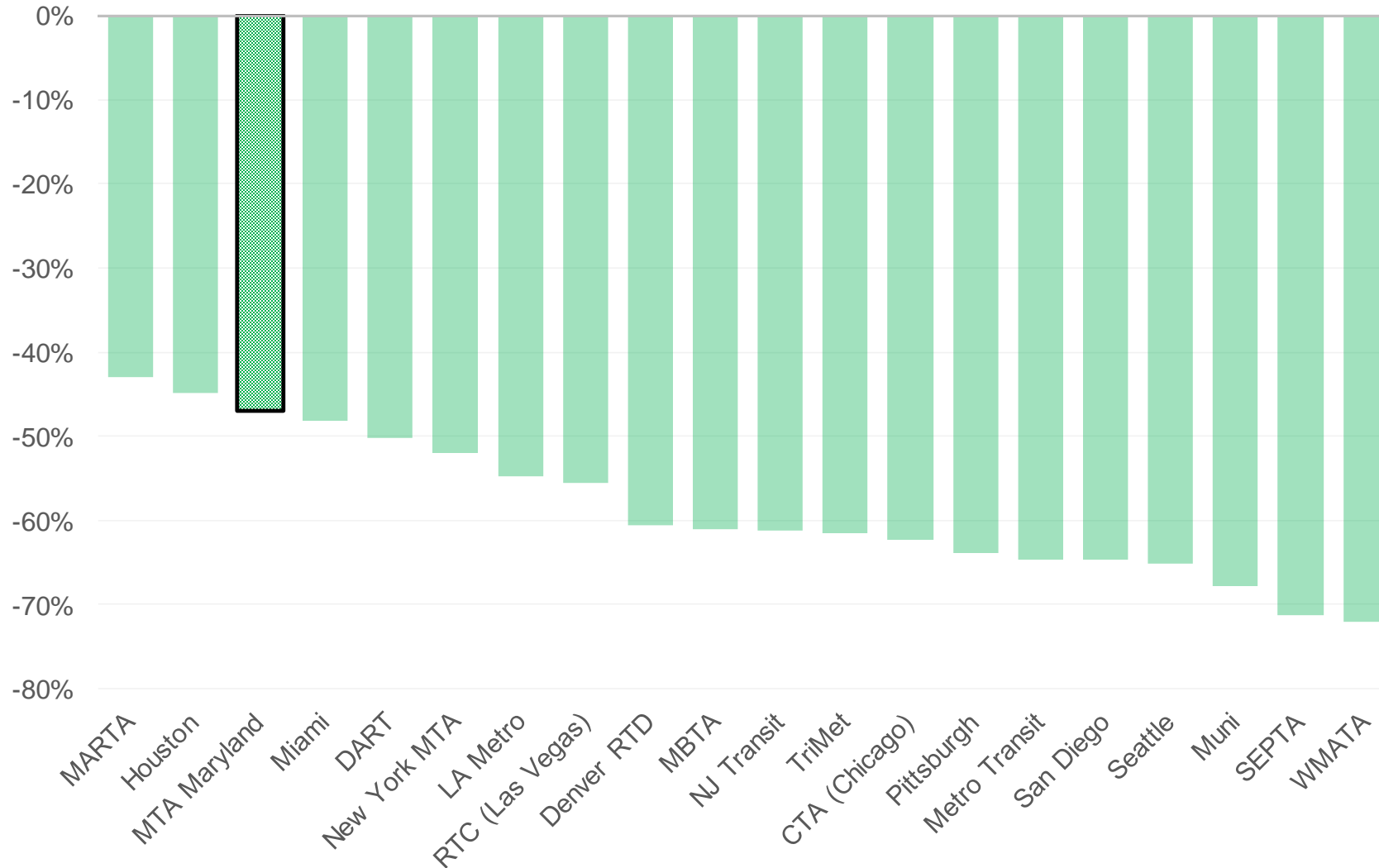
COVID-19 Ridership Impacts



- All of the top 25 transit agencies in the US experienced a ridership decline of over 50 percent when comparing the first 6 months of the pandemic to the same months in 2019
- Total MTA ridership has fallen by less (59%) than most other top transit agencies in the nation, which collectively declined by 72%

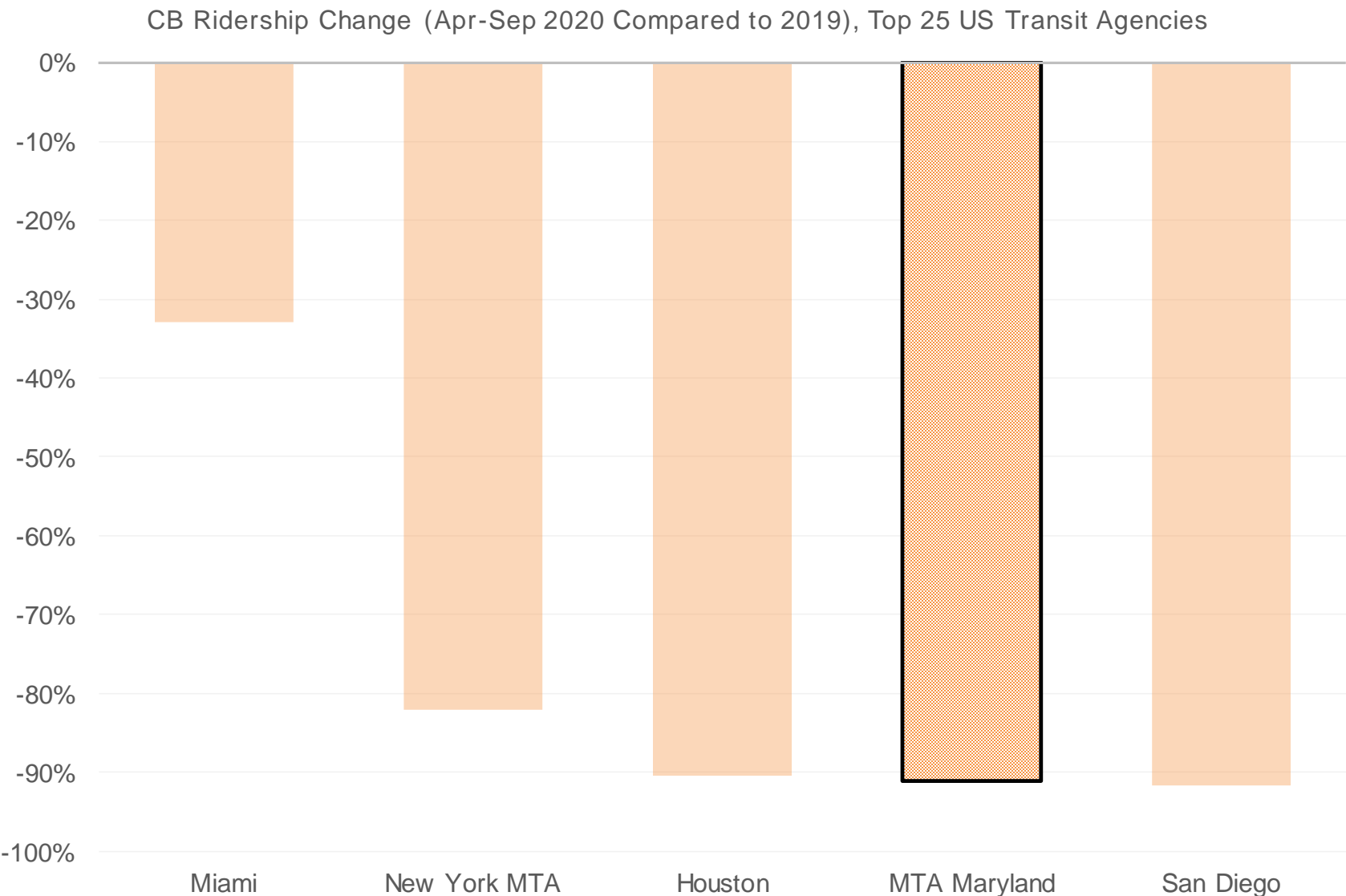
COVID-19 Core Bus Ridership Impacts

Bus Ridership Change (Apr-Sep 2020 Compared to 2019), Top 25 US Transit Agencies



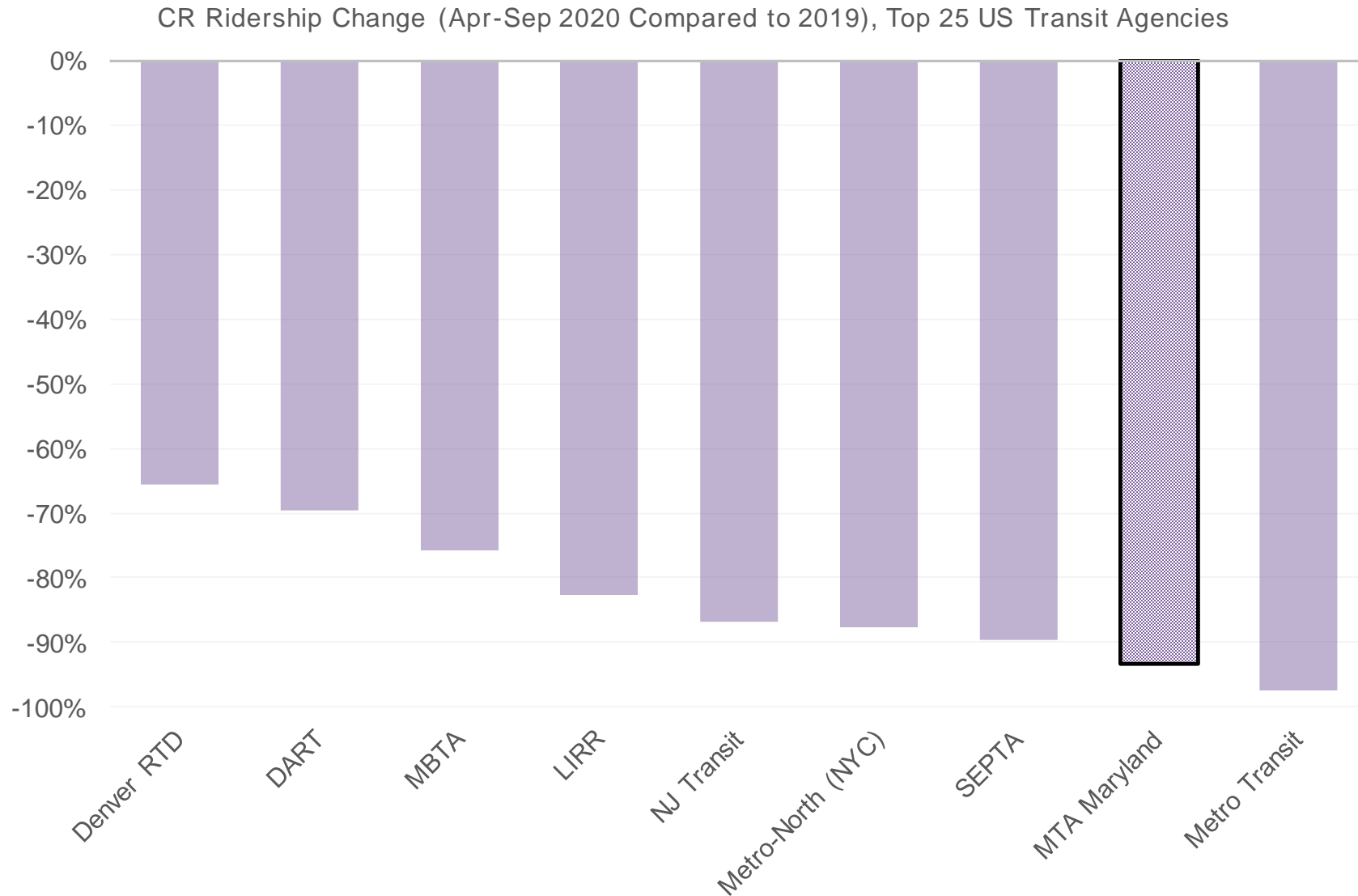
- MTA had one of the lowest drops in core bus ridership (47%) among the top 25 agencies
 - Only MARTA (43%) and Houston Metro (45%) experienced less of a decrease
- Every top transit agency with the exception of San Diego saw bus ridership declines less than the overall total
 - Essential workforce and bus ridership
- WMATA and SEPTA led the nation in bus ridership declines, both at over 70%

COVID-19 Commuter Bus Ridership Impacts



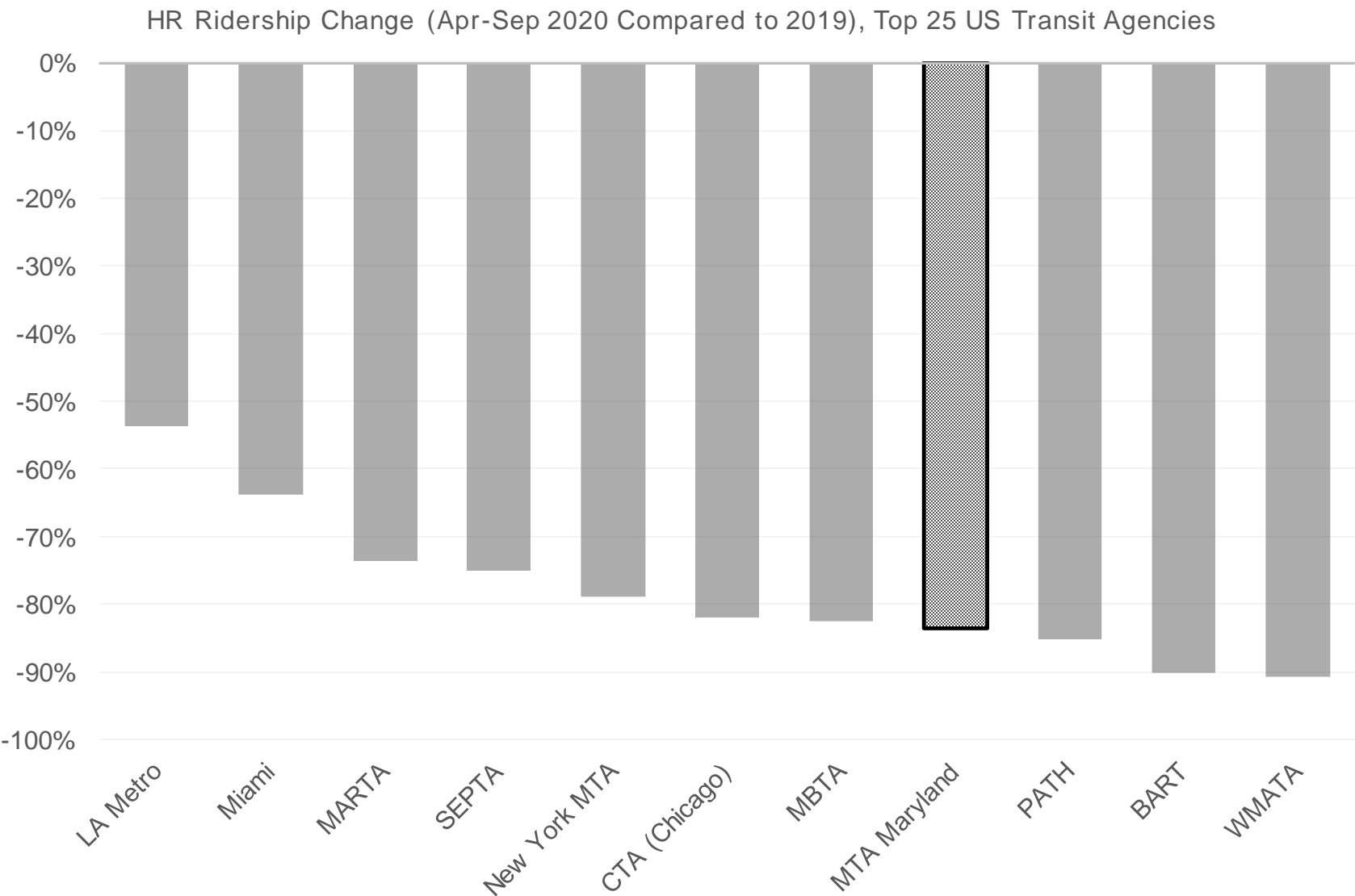
- MTA had one of the highest drops in commuter bus ridership at over 90%
- As of the most recent data month, MTA still has the 5th largest commuter bus program in the country

COVID-19 Commuter Rail Ridership Impacts



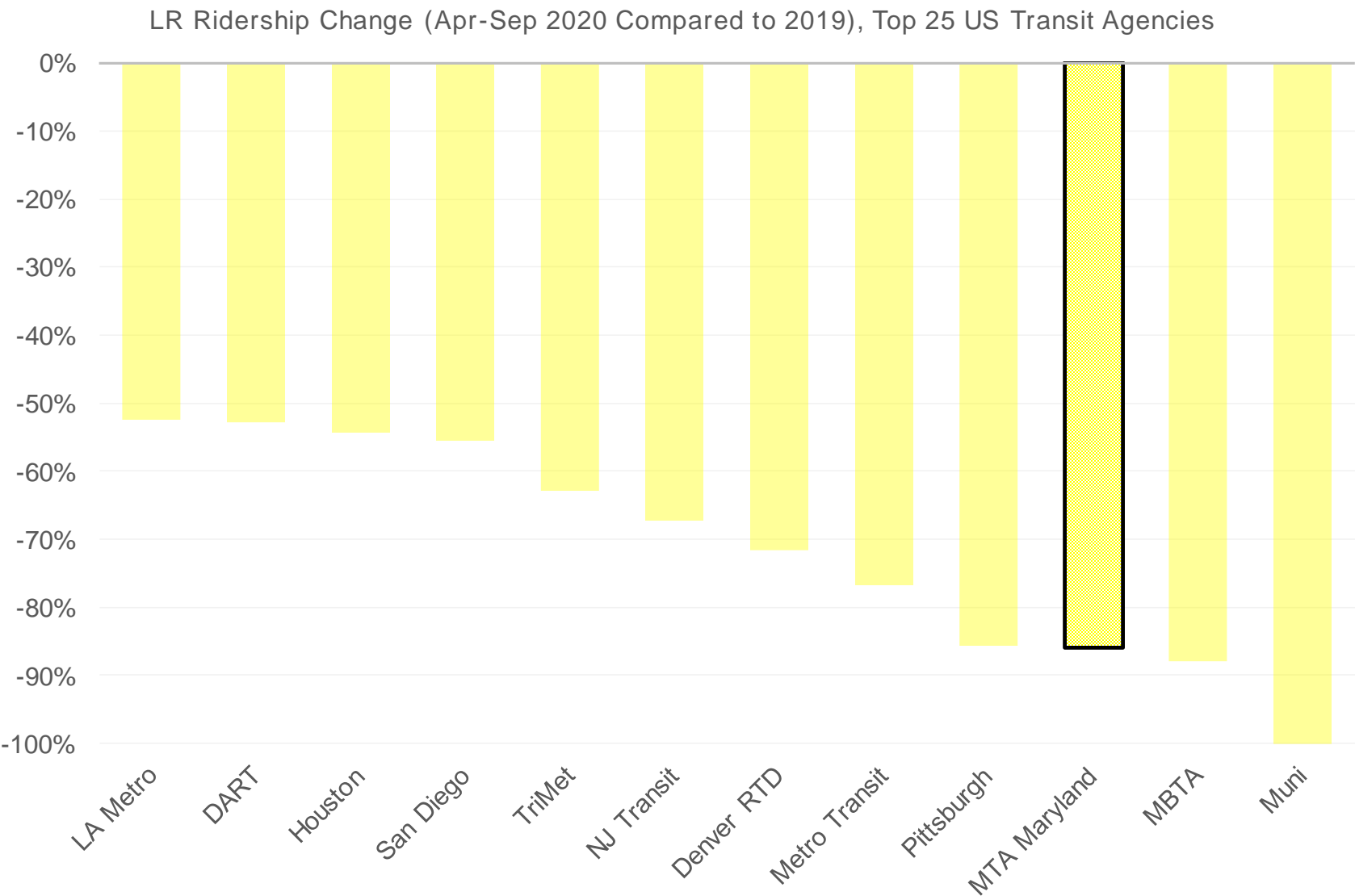
- MTA had the second-highest drop in commuter rail ridership at over 93%
 - Only Metro Transit in Minneapolis had a greater decrease in ridership (97%)
- More than 80% of federal workers expect to telework three days per week or more in the future, which could have implications for MARC

COVID-19 Heavy Rail Ridership Impacts



- MTA Metro ridership declined by 84%, similar to heavy rail systems in Boston (83%) and Chicago (82%)
- WMATA experienced greatest decrease
 - Role of federal telework

COVID-19 Light Rail Ridership Impacts

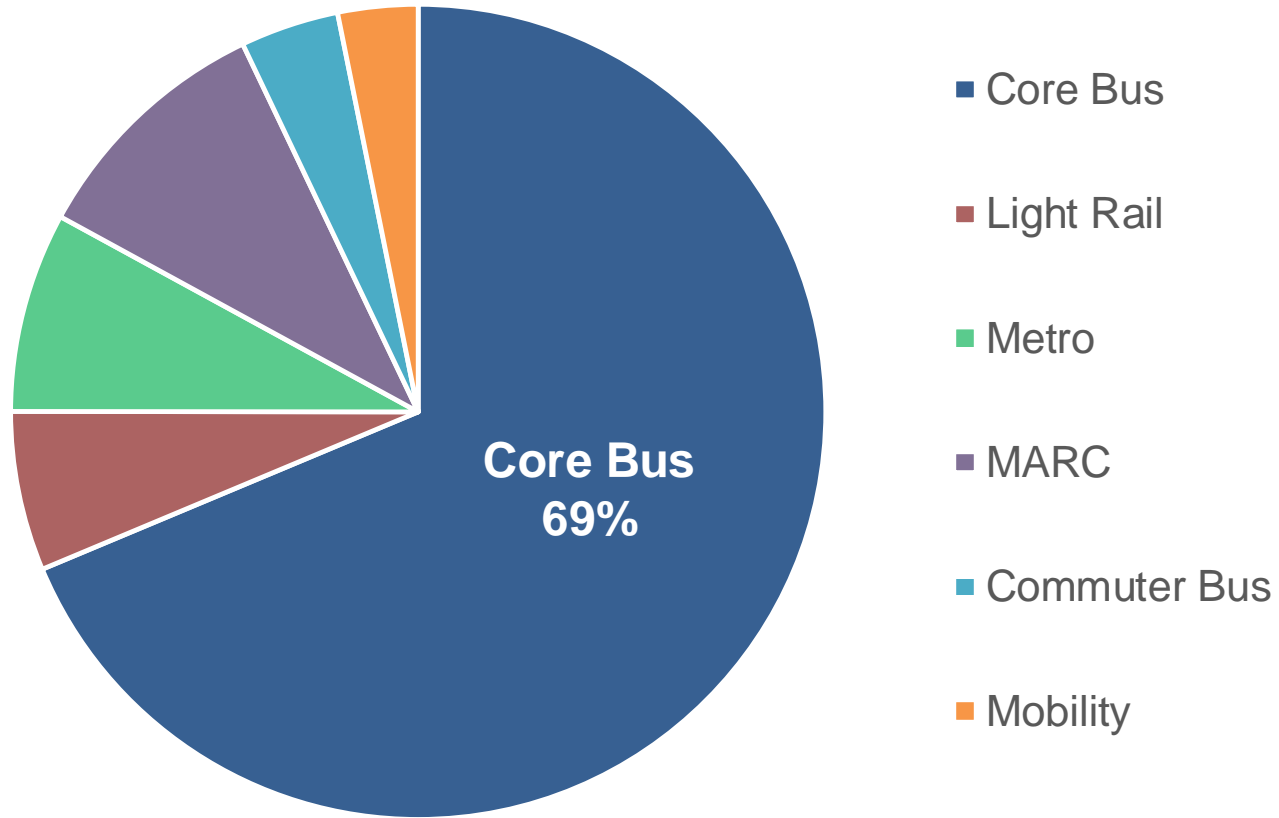


- MTA light rail ridership experienced one of the greater drops in ridership (86%), surpassed only by MBTA (88%) and Muni in San Francisco, which replaced its light rail service entirely with buses

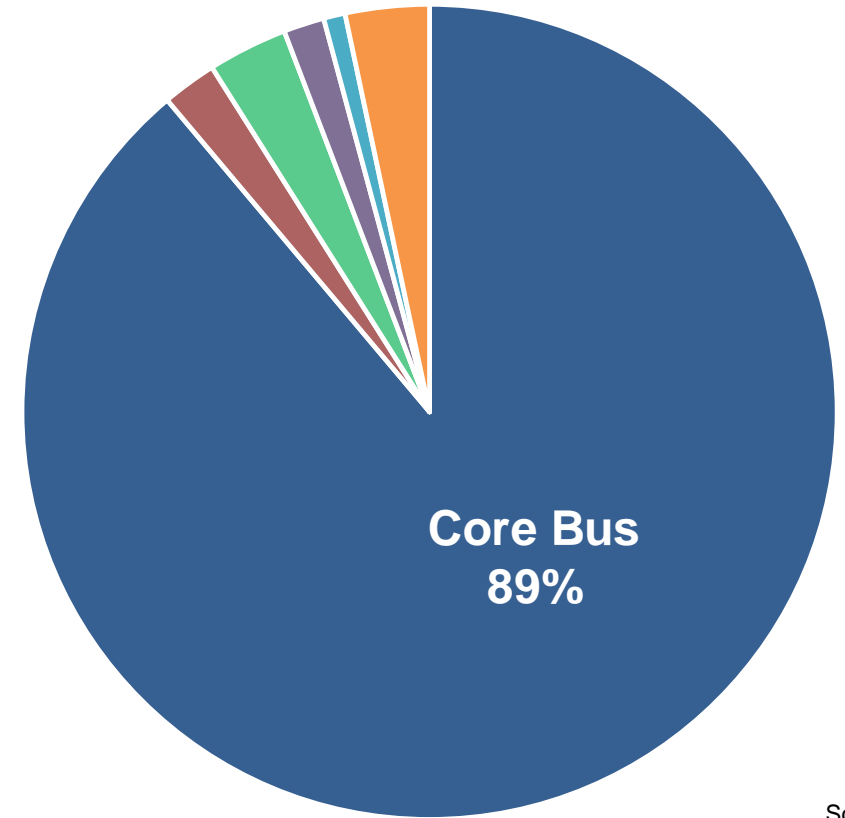
Changes in Transit Modal Share

- Core Bus now represents 89% of total ridership, compared to 69% last year
- MARC declined from 10% of ridership to ~1.5%
- Commuter Bus declined from 4% to less than 1%
- Mobility stayed relatively constant at ~3%

Ridership Share by Mode, April-September 2019



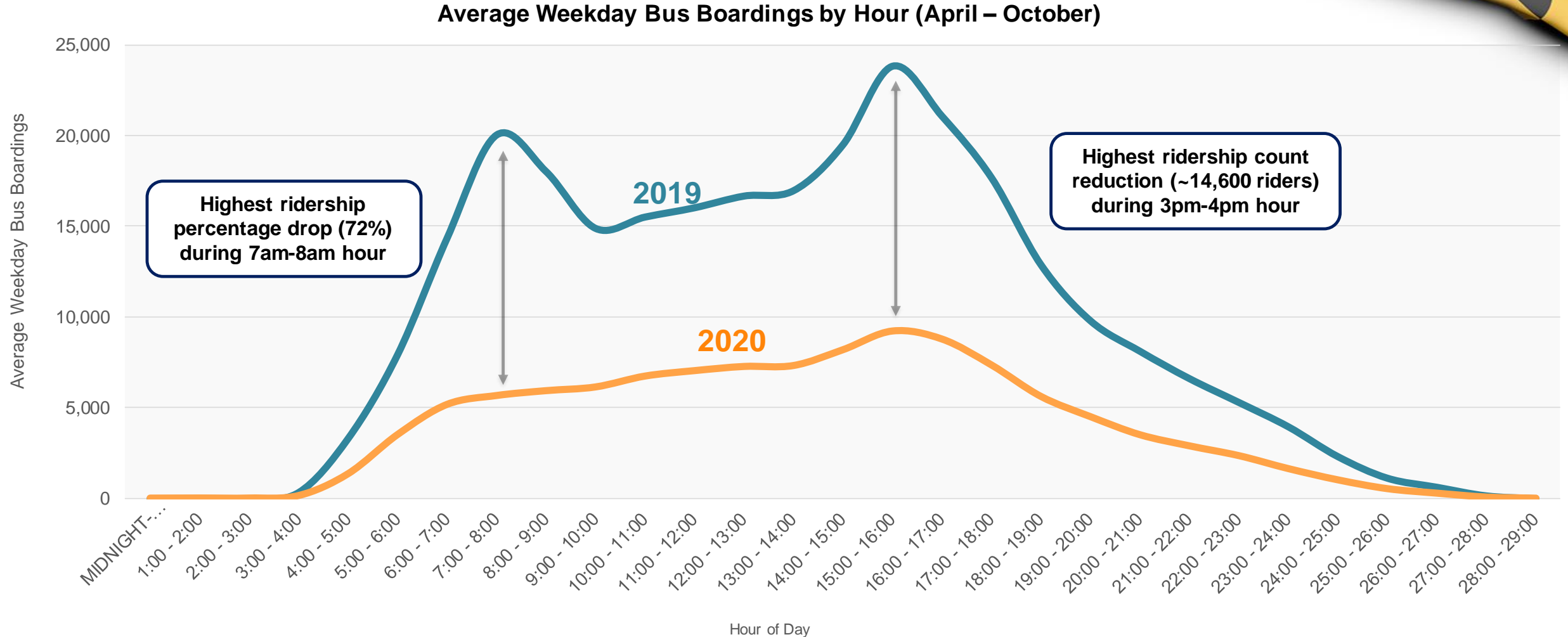
Ridership Share by Mode, April-September 2020



Source: NTD

A Decline in Transit's Peaks

- Transit ridership has become more evenly spread throughout the day



Service Updates

- Winter Service Change – effective February 14, 2021
 - Recalibrates runtimes on 53 of the 65 core bus routes
 - Responds to ridership and traffic conditions, aiming to reduce early buses
 - Includes minor adjustments in service across routes in response to ridership demand
 - Continues discontinuation of all Express routes and LocalLinks 38 and 92
- Working with BCPSS on supplemental service school trippers as plans become available
- Will monitor ridership and traffic trends and adjust service accordingly for Summer and Fall



Project Updates

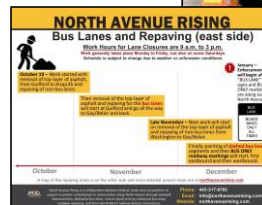


North Avenue Rising



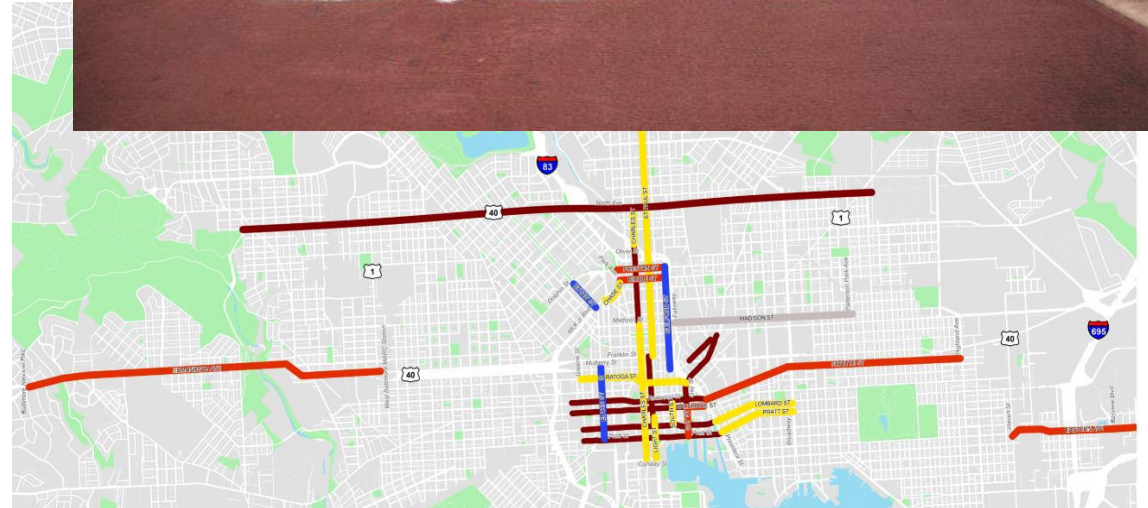
TIGER

- Partnership with Baltimore City Department of Transportation
- Paving started for **7 miles of dedicated bus lanes**
 - 60% complete
- Sidewalks and pedestrian lights installed on nearly all of North Avenue corridor
- Interior and exterior station lighting upgrades completed
- Installation underway for Transit Signal Priority (TSP) detection hardware
 - 50% complete
- Communicating construction impacts to public



Dedicated Bus Lanes

- Repainting to begin this Spring
- Order of repainting:
 - Baltimore Street from Arch to Gay
 - Fayette Street from President to Arch
 - Gay Street from Baltimore to Forrest
 - Charles Street from Madison to Oliver
 - Saint Paul Place/Light Street from Mount Vernon to Pratt
- Reminder: lanes still enforced when not painted red



Kirk Division Modernization

MASS TRANSIT SUBSCRIBE | MAGAZINE | ADVERTISE | CONTACT US | SUPPLIER'S DIRECTORY
BUS RAIL TECHNOLOGY SAFETY & SECURITY ALTERNATIVES

BUS | INFRASTRUCTURE | MDT MTA MARKS CONSTRUCTION MILESTONE IN KIRK AVENUE BUS DIVISION PROJECT

MDOT MTA marks construction milestone in Kirk Avenue Bus Division Project

The milestone was celebrated at a ceremony that included signing, raising and placing the final truss.

Maryland Transit Administration (MTA) OCTOBER 25, 2019



- \$80 million facility will accommodate 175 buses, including articulated and hybrid vehicles
- 180,000 square feet of improved bus storage, fueling, washing, radio dispatching, administrative offices, and operator support facilities
- Entire facility under cover
 - Will address community concerns related to bus visibility, noise, and emissions
- Operations to begin in mid-February

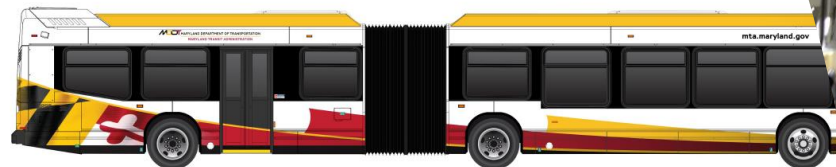
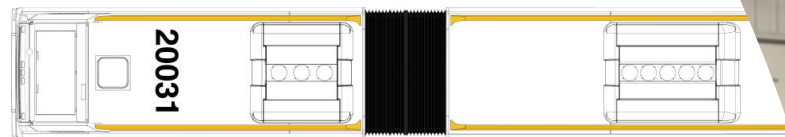
Rail Vehicle Updates

- Light Rail Mid-Life Overhaul
 - \$163 million overhaul program for 53-car fleet
 - Approximately halfway done
 - ~25 vehicles accepted for revenue service
 - Expected to be 75% complete by end of 2021
 - Completion by end of summer 2022
- Metro Fleet and Train Control Replacement
 - \$400+ million project for 78 new Metro vehicles
 - Car shell manufacturer has resumed production after closing due to COVID-19
 - Train Control is continuing construction and testing
 - First carshell will be delivered to Miami manufacturing facility in February for assembly of first married pair
 - Will arrive in Baltimore fall 2021 for final testing
 - All new vehicles to be in revenue service by Spring 2024

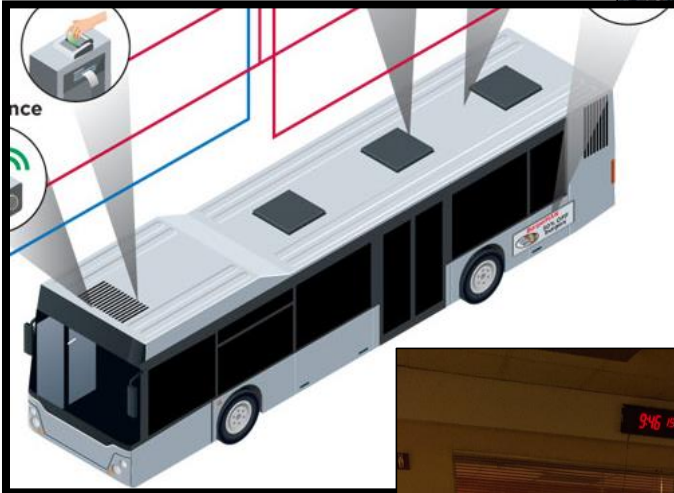


Bus Fleet Updates

- \$212 million 5-year bus purchase
- 50 out of 70 Nova buses for this year have been accepted for revenue service
 - All buses due to be in service by end of year
- 30 40' buses and 40 articulated buses



Bus-USA



- \$38 million state-of-the-art upgrade and unification of all on-board bus equipment and monitoring systems
- 209 vehicles installed as of early December
 - One-third of fleet
 - On track to complete all installs by late April 2021
- 90% of training is complete for operators, mechanics, and supervisors
- Currently validating GTFS-RT with Swiftly
- Real-time capacity data
 - Late spring/early summer

Central Maryland Regional Transit Plan

- 25-year plan to define public transportation goals for the Central Maryland Region
 - Goals include improved connectivity and integration of transit services
 - Identifies corridors for future improvements
 - Final plan available at rtp.maryland.gov
- Extensive public outreach
 - Over 3,000 surveys completed
 - 45+ outreach events
 - Public comment for draft plan occurred between April and June 2020
- Shifting from plan development to implementation
 - Implementation team includes representatives from regional jurisdictions, business and advocacy groups
- Corridor studies
 - East to West: Ellicott City to Convention Center + Convention Center to Bayview (yellow)
 - North to South: Town to UMMC (neon green)
 - \$12.6 million project includes transit priority improvements to support future limited stop service and existing bus routes



Connecting Our Future

A Regional Transit Plan for Central Maryland



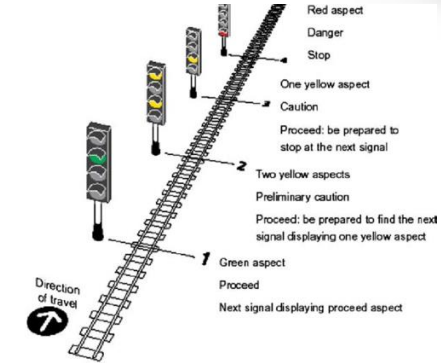
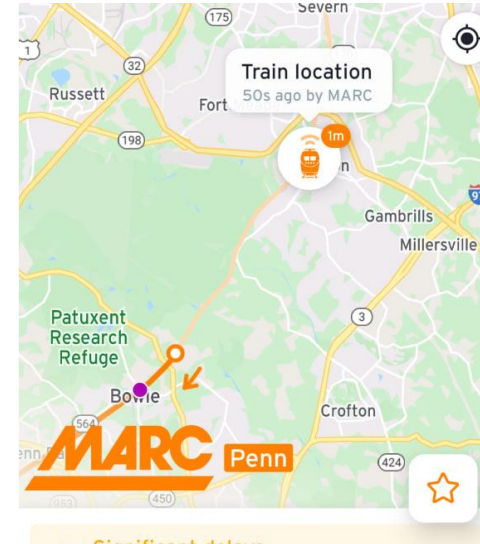
Fare System Replacement



- Working toward next generation fare system
- RFP advertised in November 2020
 - Proposals due in January 2021
 - System launch by mid-2023
- Goals include easier/contactless payment, more options to purchase/reload fares
 - Replacement of fareboxes and ticket vending machines
 - Expanded retail network
 - Improvements to mobile ticketing
 - Integration with LOTS
 - Shorter dwell times
 - Better ridership data
 - Reliability and repair time improvements

Rider-Focused Technological Updates

- Real-time launched on MARC Train Service
 - Also available on core bus and Commuter Bus
- Light Rail and Metro currently in development
 - Unique issues of short turns and underground network respectively
 - Installation and testing underway
 - On track for summer 2021 launch
- Mobility on-demand app
 - RFP to be advertised early next year
 - Mobile and app-based booking options
 - Working group of riders, advocates, and MDOD staff is contributing to pilot development



Significant delays
Posted Jul 27, 2020

Washington Union Station
Bowie State

423 5 min

525 23 min

427 1 h 40 min

MORE DEPARTURES



Toward a Zero Emissions Bus Fleet

- Focused on 50% bus fleet transition to ZEV by 2030
 - Technology: Compare electric and hydrogen fuel cell costs and capabilities
 - Service: Can current technology support bus routes that exist today?
 - Charging: How could bus storage and maintenance facilities be retrofitted?
 - Phasing and financing options
- Funding for two pilots, with revenue service expected in 2022
 - \$2.6M FTA Low and No Emissions Grant – 3 60' battery electric buses and charging infrastructure
 - \$3M Volkswagen Grant – 4 40' battery electric buses and charging infrastructure





What We're Thinking About



Thinking Strategically About the Future of MTA

- Service Delivery
 - New service models?
 - More dynamic and agile service planning
 - Multimodalism
- Equity & Inclusion
 - Service impacts
 - ADA
 - Community partnerships
- Communications
 - Internal and external
 - Service disruptions
- Fiscal Management
 - Impacts on service
 - Investment prioritization
 - Scenario planning
- Safety & Security
 - COVID-19 safety practices
 - State of good repair
 - Operator safety



Conclusion

- Transit funding faces significant headwinds in the near-term
- Agency is still focused on exciting projects
- Monitoring city and federal outlook
- Transit plays a huge role in the COVID-19 recovery:
 - Ensuring cars don't overwhelm city streets
 - Providing employment access to essential workers and low-income residents
 - Improving environmental outcomes
- We've got to adapt and evolve to meet rider needs