



Strategic Plan

Future Trends & Themes Summary

Presented to Executive Steering Committee:
April 12, 2017

The region and the Prince William area share the following key themes:



Preparing for the impact of demographic and economic trends that will reshape the entire region.



Creating a sense of place to attract new high-quality workers, who in turn attract high-quality employers.



Adapting travel patterns for an improved quality of life.



Supporting multimodal travel and high-capacity transit networks to connect jurisdictional activity centers, and to connect to the region's core.



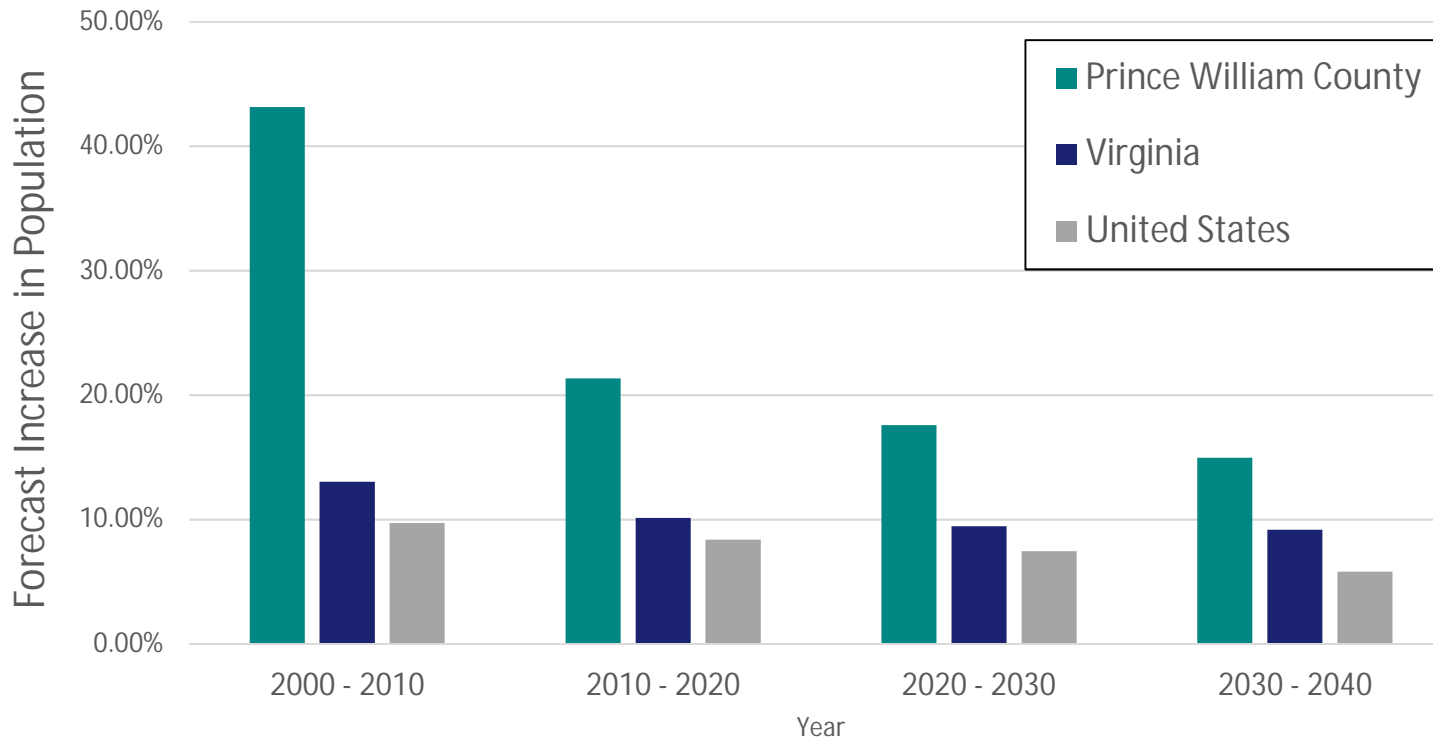
Supporting transit-oriented growth.



The Regional/Local themes and supporting information from National/industry trends provide important insight into the future facing the PWC area and PRTC.



Significantly higher population growth rate

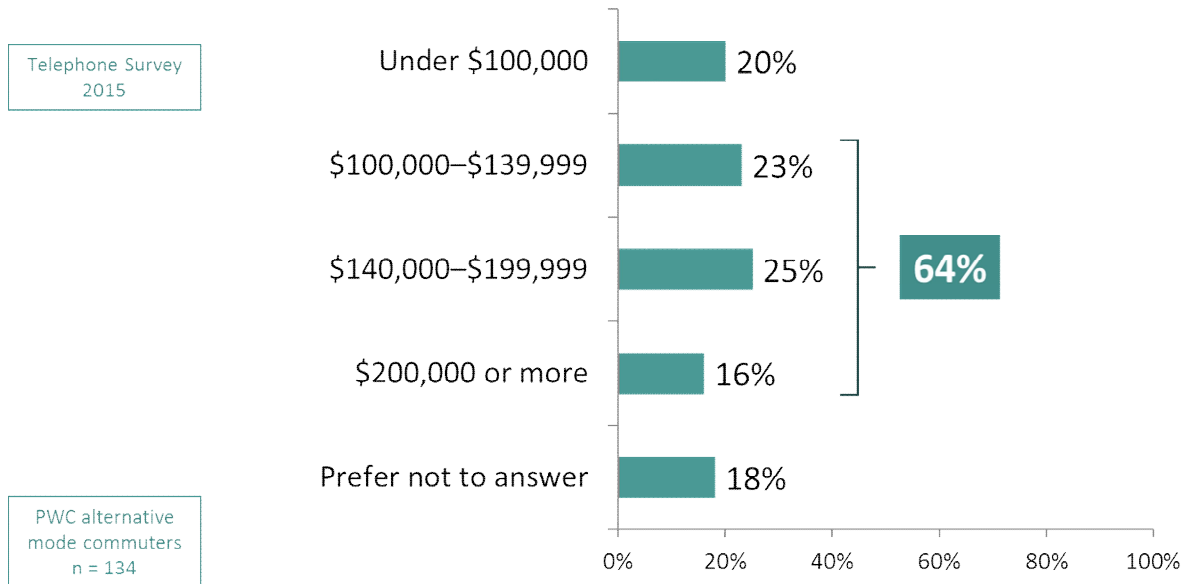




Lack of affordable housing in the DC Core forcing out even high wage earners

About Two-Thirds of PWC Area Alternative Mode Commuters Have Household Incomes of \$100K or More

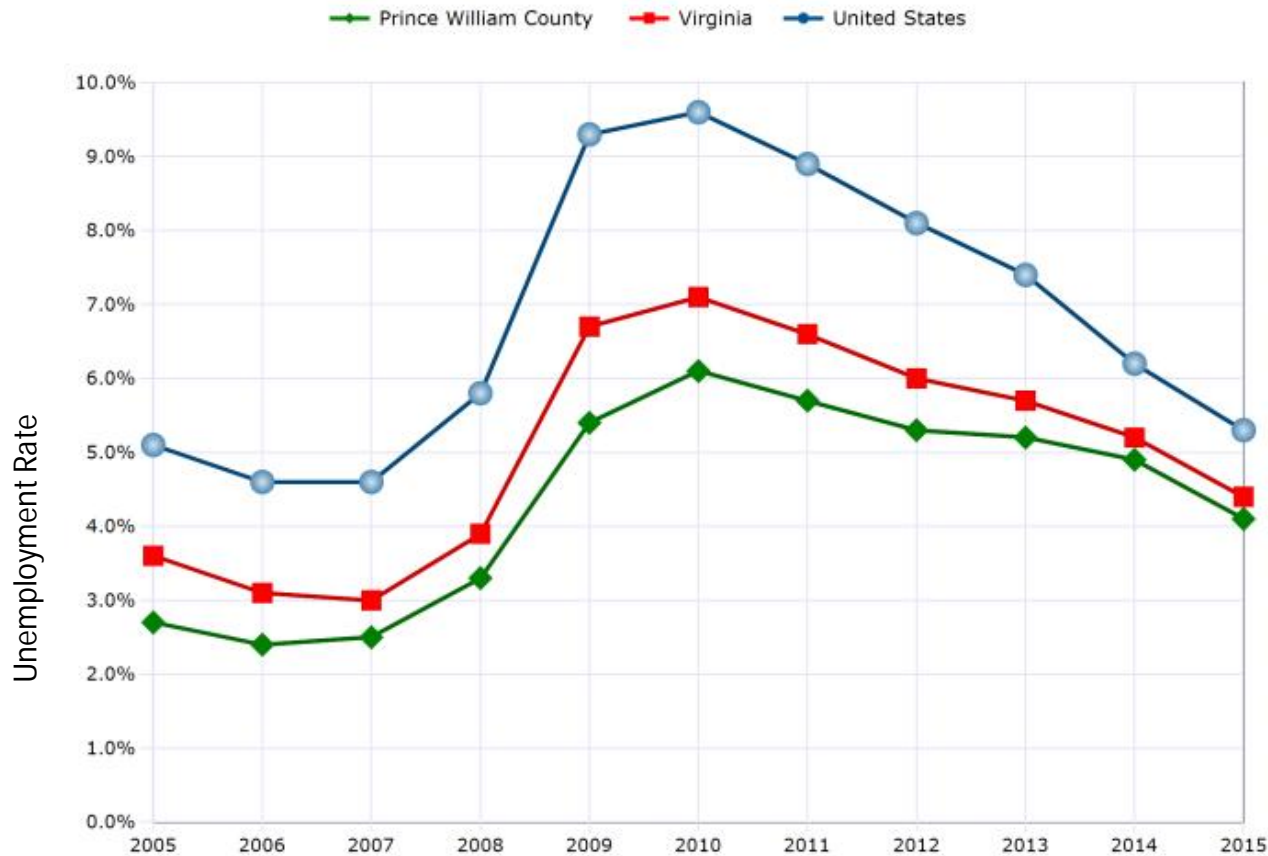
Average Annual Household Income Is \$140,000



2015 Telephone Q124a and Q124b. Please stop me when I reach the category that best represents your household's total annual income. Is it...



Competitive employment market, strong economy



Source: Virginia Employment Commission, Economic Information & Analytics



Preparing for demographic and economic trends

Diverse Economy

(Top Five Industries in Prince William County Area)

1. *Local and Federal Government*
2. *Retail Trade*
3. *Accommodation and Food Services*
4. *Construction*
5. *Health Care and Social Assistance*

Data Center Investment

- *\$2.4 Billion in Capital investment and 370 new jobs (2011-2016)*
- *10,000 acres identified as Data Center Opportunity Zone in 2016*

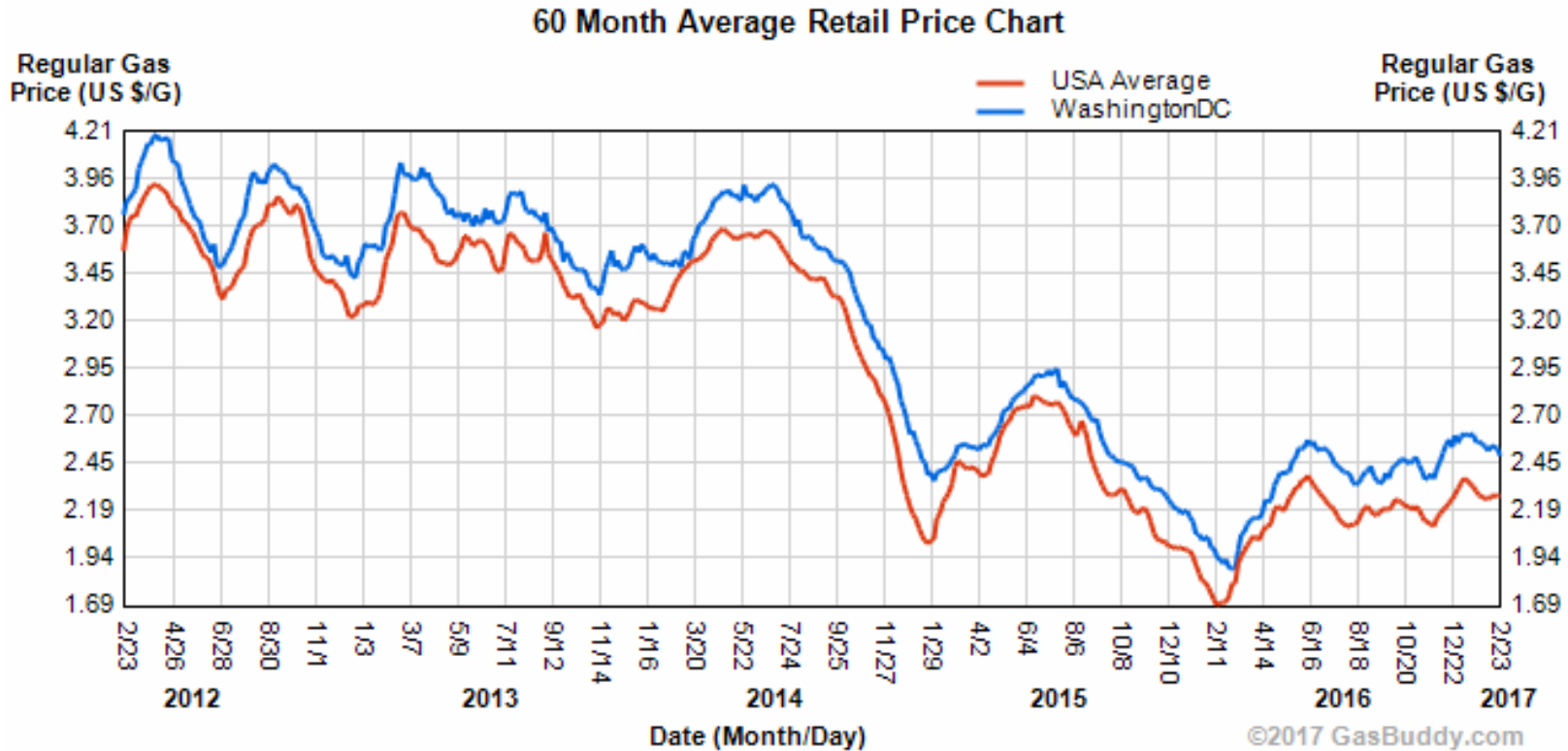


SENTARA®





Fuel price decline has leveled off and prices are likely to increase

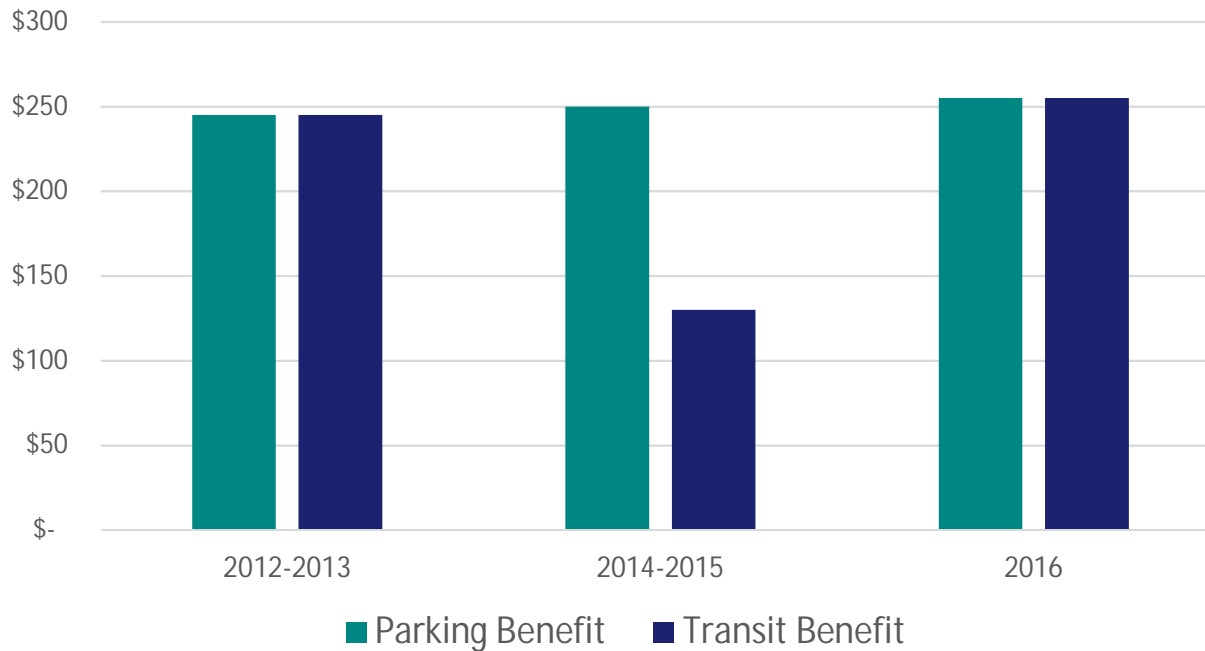


Source: Virginia Employment Commission, Economic Information & Analytics



Commuter benefits will remain on par with parking benefits

Federal Transit and Parking Monthly Benefits





Creating a sense of place





Common regional and local objectives and strategies to help create communities of choice:

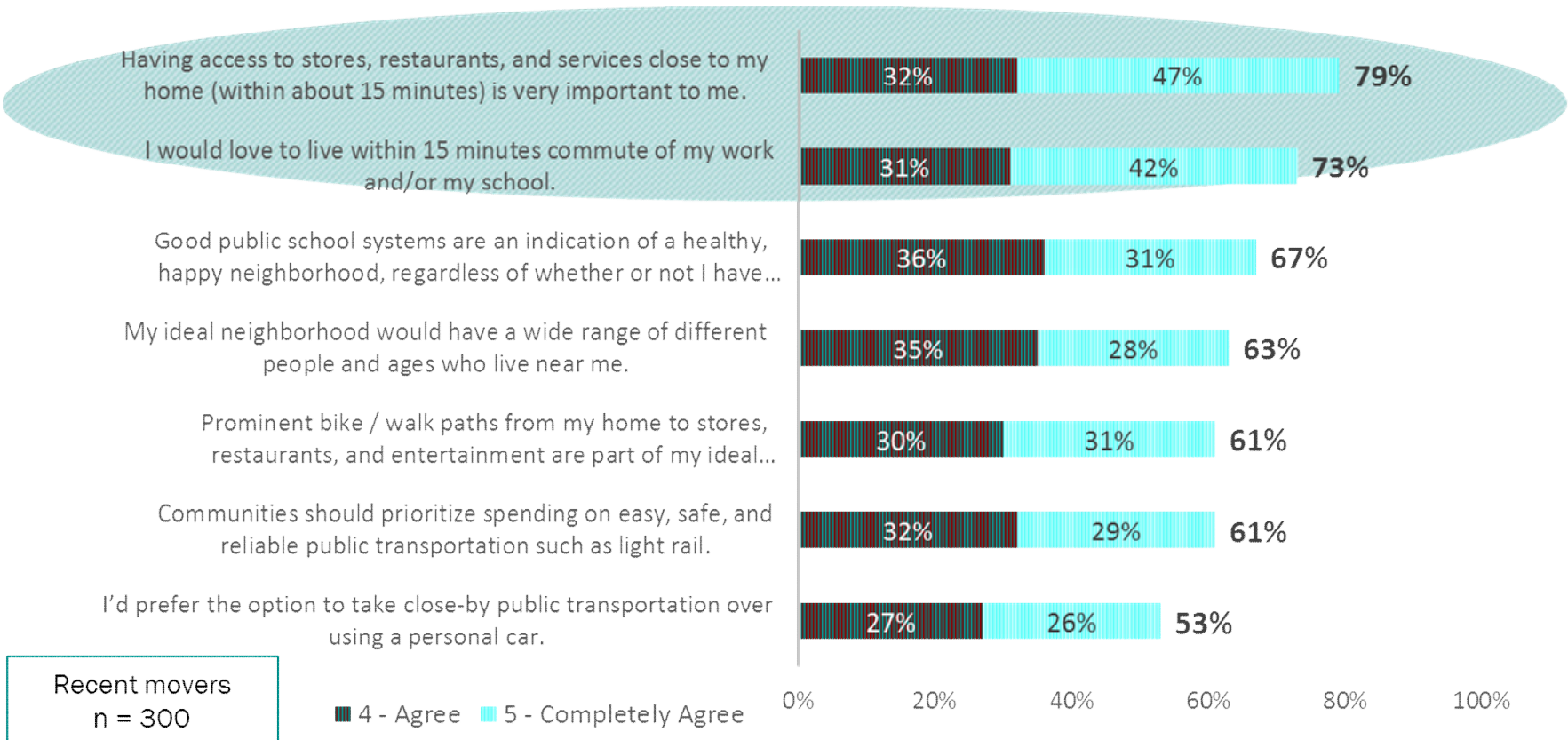
- Attracting high-quality workers to attract high-quality employers
- Mixed-used walkable communities
- Promoting residents working close to home
- Attracting new companies and businesses to targeted development areas
- Emphasizing strategic redevelopment opportunities





Creating a Sense of Place

Four out of five RECENT move respondents say that having stores, restaurants, and services within 15 minutes of home is very important





Significantly more Millennial and Gen X respondents than Boomer respondents agreed with most placemaking statements

Having access to stores, restaurants, and services close to my home (within about 15 minutes) is very important to me.

I would love to live within 15 minutes commute of my work and/or my school.

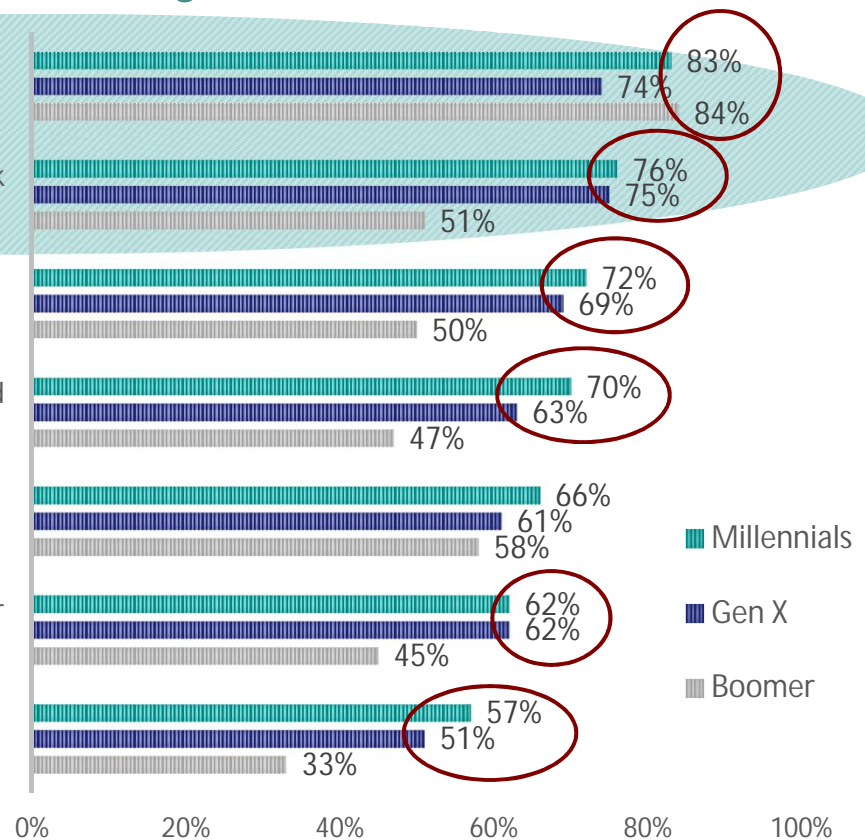
My ideal neighborhood would have a wide range of different people and ages who live near me.

Communities should prioritize spending on easy, safe, and reliable public transportation such as light rail.

Prominent bike / walk paths from my home to stores, restaurants, and entertainment are part of my ideal neighborhood.

I'd prefer the option to take close-by public transportation over using a personal car.

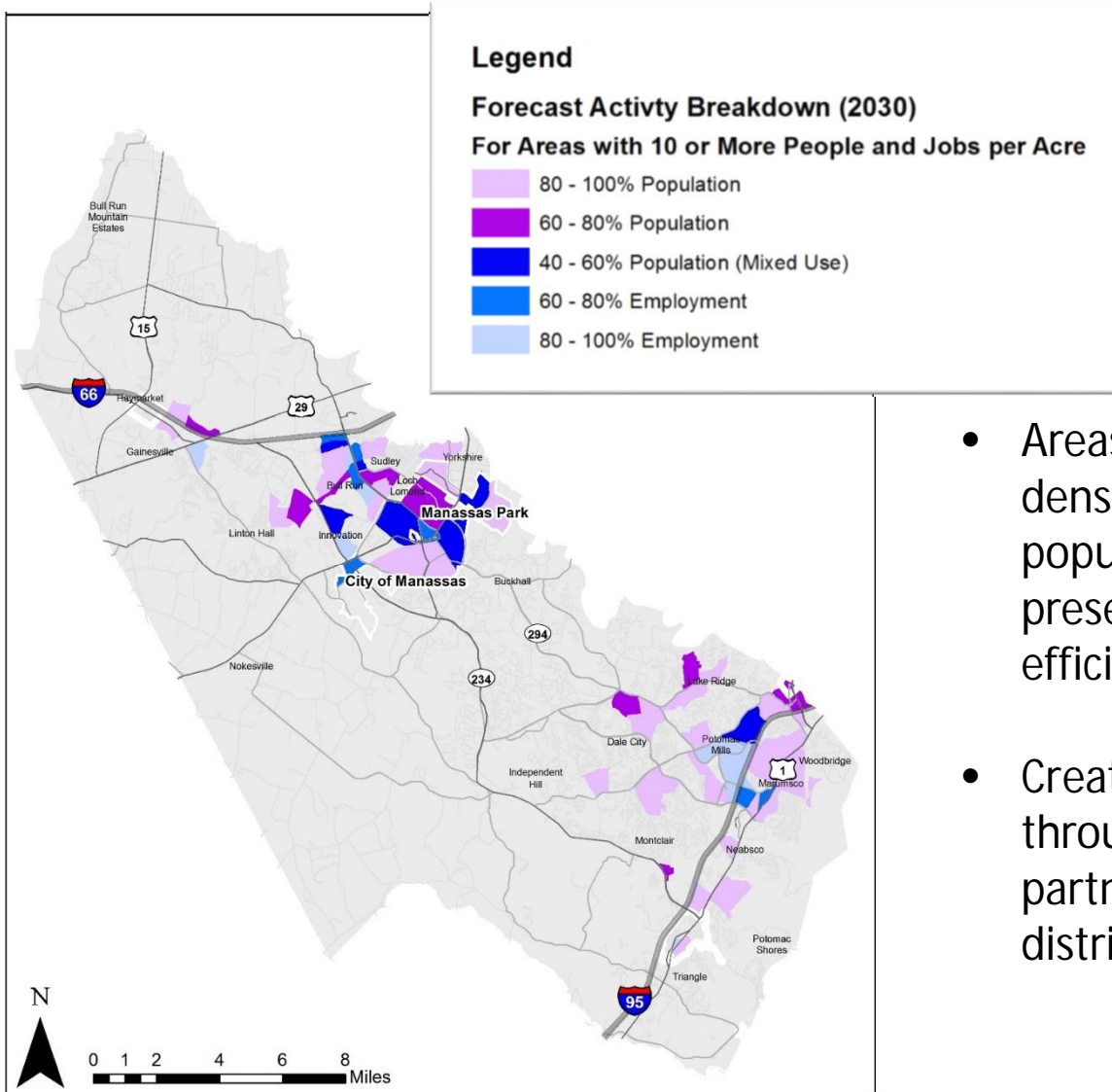
Good public school systems are an indication of a healthy, happy neighborhood, regardless of whether or not I have school-age children.



n = 600



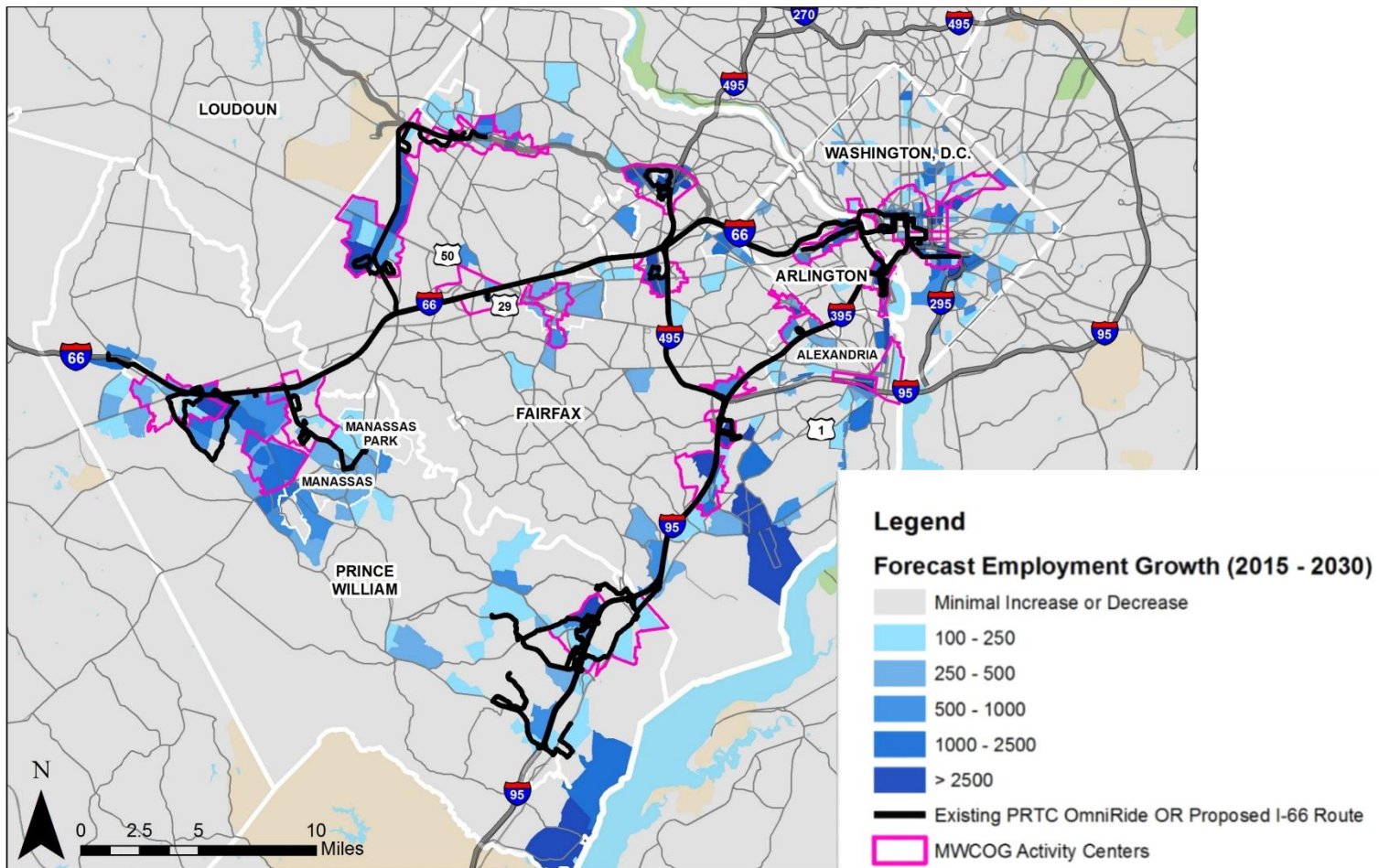
Creating a Sense of Place



- Areas with higher forecast densities and a relatively even population /employment split present best opportunities for efficient local transit service
- Creates financial opportunities through public-private partnerships and/or specific tax districts



PRTC is well positioned with existing/future services targeted in areas of high-forecast employment growth





30%
of Virginians
between the
ages of 18 and 25
who could have
a driver's license
choose not to or
don't have one

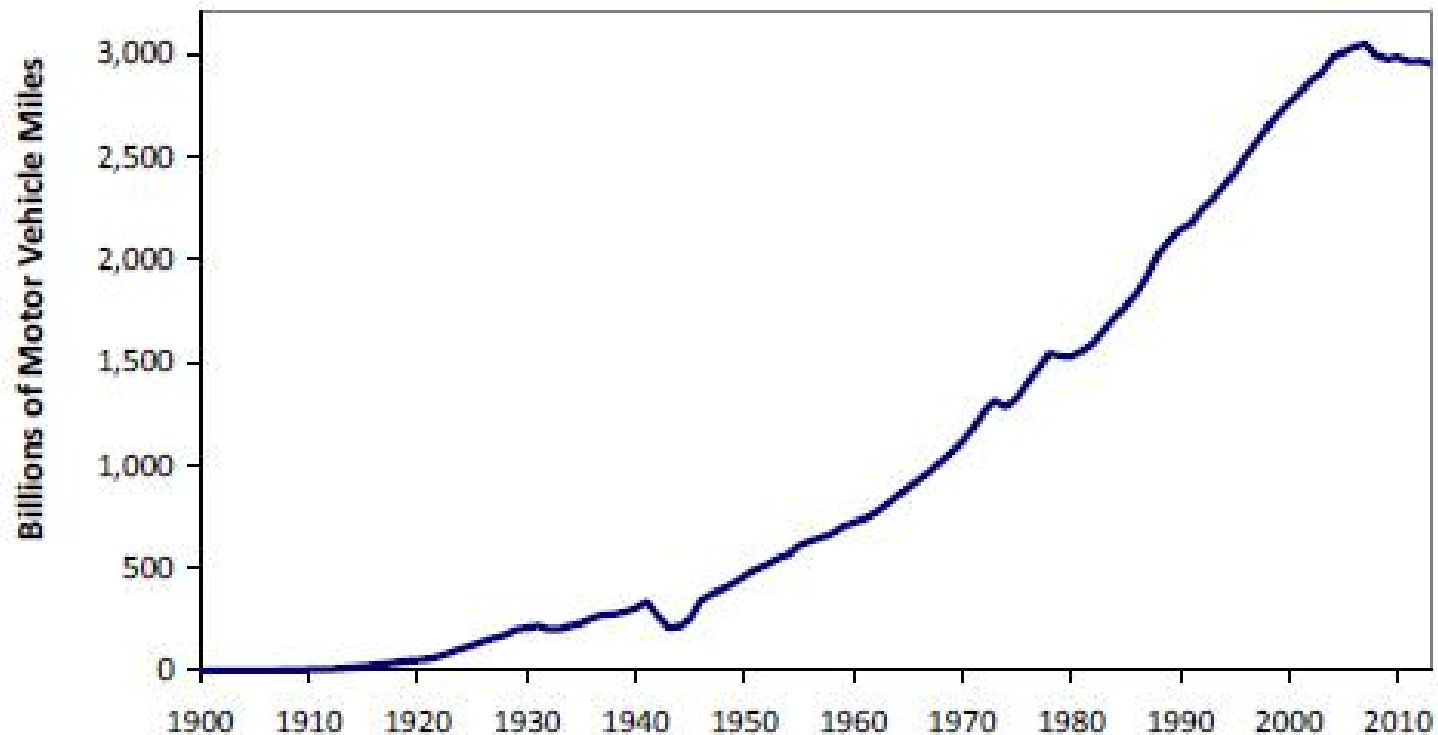
Adapting travel patterns for an improved quality of life





Adapting travel patterns

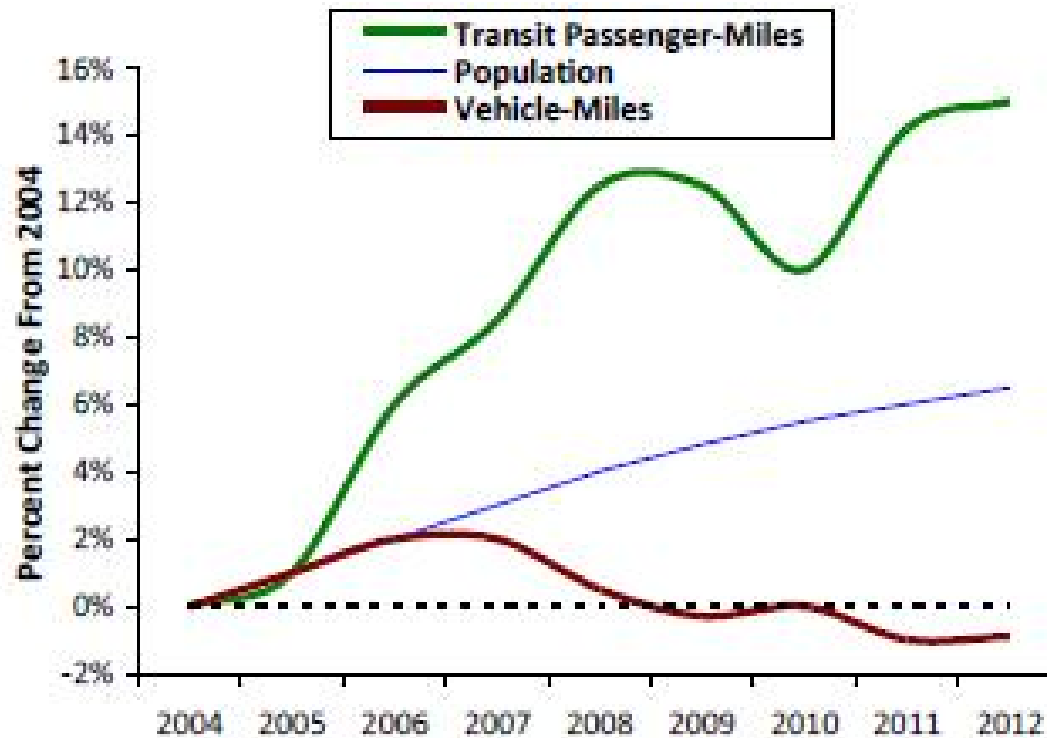
US vehicle travel grew steadily during the Twentieth Century, but peaked in 2006 and has declined since.





Adapting travel patterns

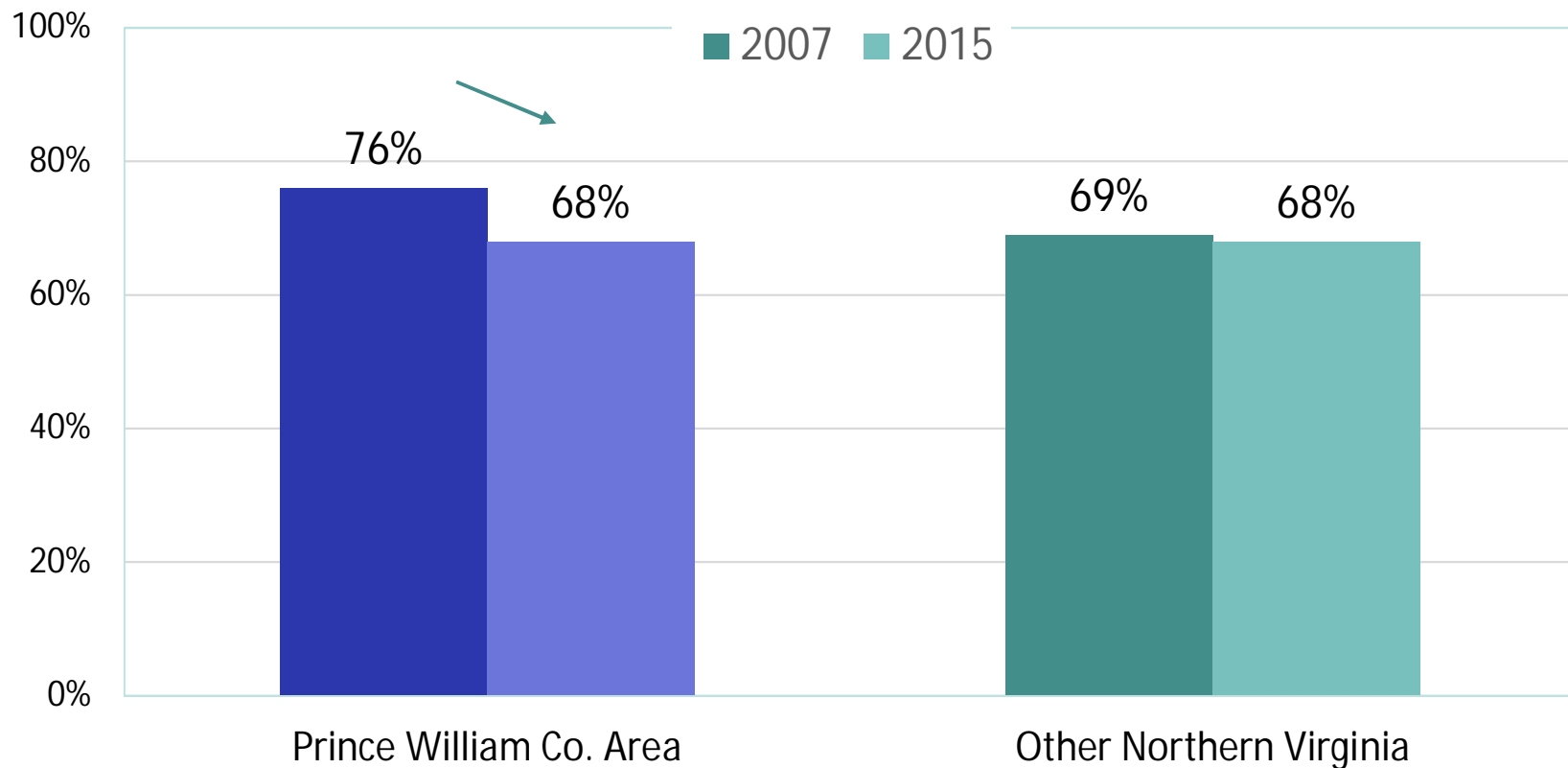
At the same time, transit use nationally has increased significantly



Source: APTA 2013

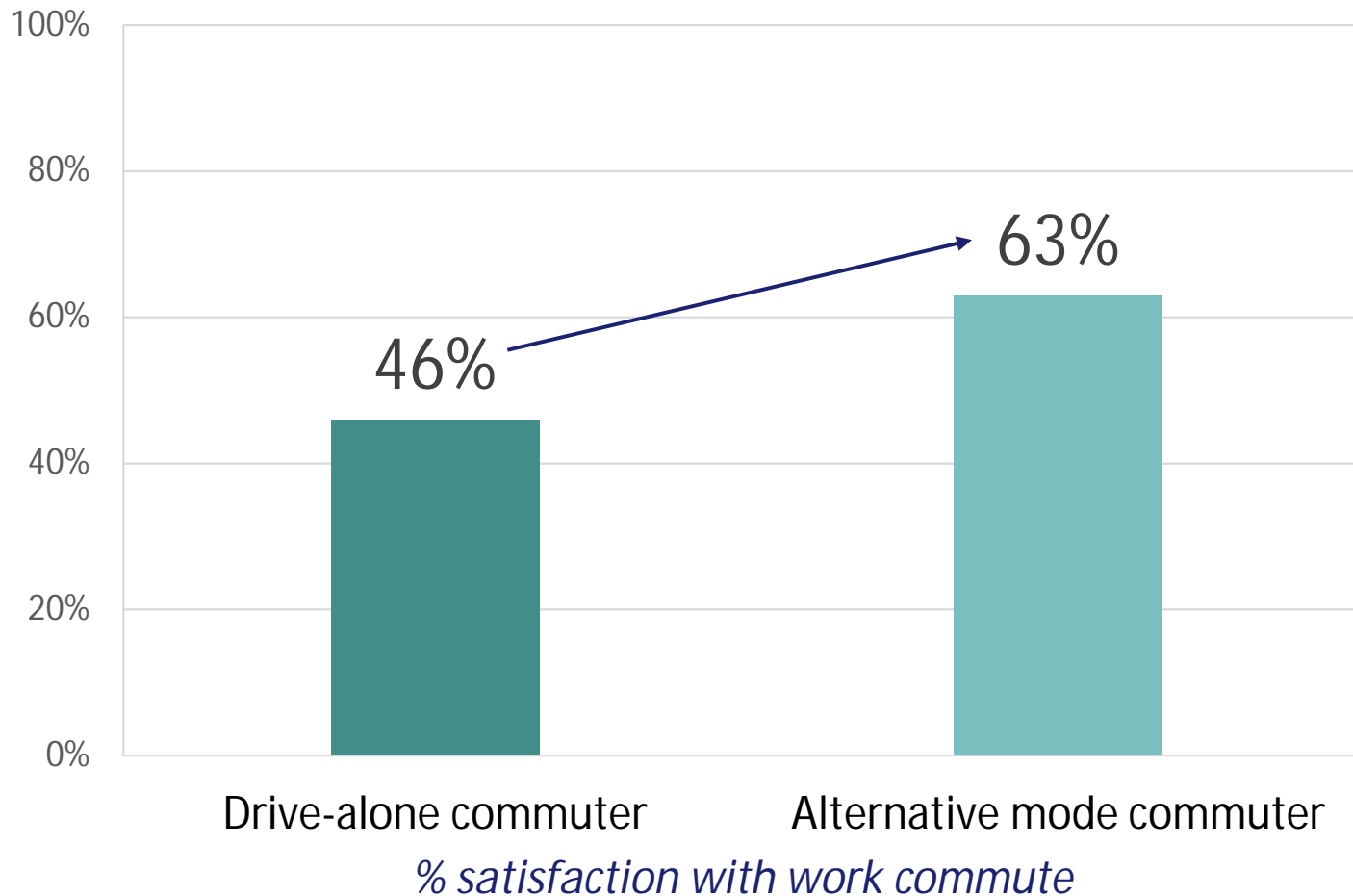


PWC Area's Reduction in Driving Alone Outperformed Other Northern Virginia Rideshare Markets





Alternative Mode Commuters are Significantly More Satisfied with their Trip to Work



Source: Virginia Travel Survey

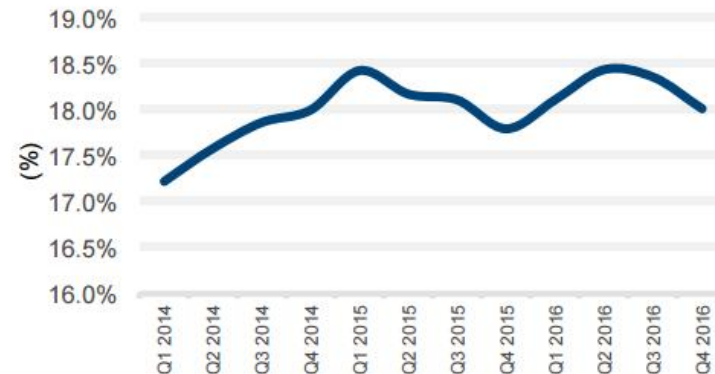


Adapting travel patterns

Workplace habits are changing. Fewer people are going into the office on a daily basis

- PRTC and VRE have experienced lower ridership on Mondays and Fridays
- Many employers offer flexible “hoteling” space in place of assigned desks
- Alternative work schedules are becoming more popular to balance personal commitments
- Office vacancy rates have generally increased over the past couple of years
- About 3% of the workforce now works from home at least half of the time

Vacancy Rate



Source: Colliers International, CoStar Group



Adapting travel patterns

Transit agencies around the country are partnering with TNCs on pilot programs to subsidize trips or provide connections for the “first and last mile”



+





Adapting travel patterns

Research and pilots of connected and autonomous vehicles are becoming more prevalent but significant impacts to mobility are still years away

SAE level	Name	Narrative Definition	Execution of Steering and Acceleration/Deceleration	Monitoring of Driving Environment	Fallback Performance of Dynamic Driving Task	System Capability (Driving Modes)
Human driver monitors the driving environment						
0	No Automation	the full-time performance by the <i>human driver</i> of all aspects of the <i>dynamic driving task</i> , even when enhanced by warning or intervention systems	Human driver	Human driver	Human driver	n/a
1	Driver Assistance	the <i>driving mode</i> -specific execution by a driver assistance system of either steering or acceleration/deceleration using information about the driving environment and with the expectation that the <i>human driver</i> perform all remaining aspects of the <i>dynamic driving task</i>	Human driver and system	Human driver	Human driver	Some driving modes
2	Partial Automation	the <i>driving mode</i> -specific execution by one or more driver assistance systems of both steering and acceleration/deceleration using information about the driving environment and with the expectation that the <i>human driver</i> perform all remaining aspects of the <i>dynamic driving task</i>	System	Human driver	Human driver	Some driving modes
Automated driving system ("system") monitors the driving environment						
3	Conditional Automation	the <i>driving mode</i> -specific performance by an <i>automated driving system</i> of all aspects of the <i>dynamic driving task</i> with the expectation that the <i>human driver</i> will respond appropriately to a <i>request to intervene</i>	System	System	Human driver	Some driving modes
4	High Automation	the <i>driving mode</i> -specific performance by an automated driving system of all aspects of the <i>dynamic driving task</i> , even if a <i>human driver</i> does not respond appropriately to a <i>request to intervene</i>	System	System	System	Some driving modes
5	Full Automation	the full-time performance by an <i>automated driving system</i> of all aspects of the <i>dynamic driving task</i> under all roadway and environmental conditions that can be managed by a <i>human driver</i>	System	System	System	All driving modes

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Supporting multimodal travel and high-capacity transit networks





National/Regional Trends

- Connecting centers within jurisdictions and connecting to the regional core
- Interconnected regional network of Express Lanes
- High-capacity transit implementation

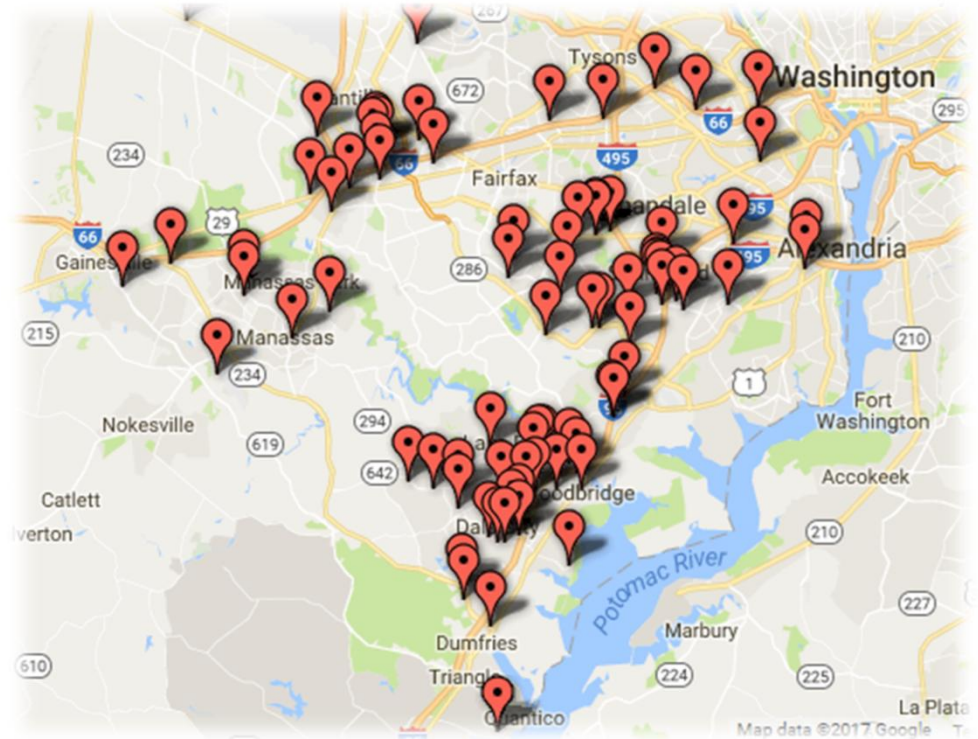
Common Local Objectives & Strategies

- Increase percentage of citizens using transit
- Provide access to alternative transportation choices
- Reduce the need for automobile usage
- Support technology for use in making travel decisions



Supporting Multimodal Travel

Urban areas that are reaching the “built out” point are focusing on optimizing highway operations / maximizing throughput (e.g. express lanes, rideshare / transit).



Source: VDOT



Supporting Multimodal Travel

PRTC will continue to play a major role in partnering on transportation initiatives at all government levels

Regional Multimodal Project	PRTC Role		
	Description	Partner in Planning	Operating Service
Transform 66: Inside the Beltway	New commuter bus service	☑	☑
Transform 66: Outside the Beltway	New and expanded commuter bus service, expanded park-and-ride lots, and new TDM strategies	☑	☑
I-395/I-95 Express Lanes	Currently operating commuter bus service; ongoing study of additional improvements	☑	☑
Richmond Highway (US 1) BRT	Proposed bus rapid transit	☑	--
Rail Expansions	Planning for VRE and Metrorail expansions	☑	--



Supporting Multimodal Travel

Locally, the Prince William County area has envisioned a future network of high-capacity transit

Prince William County
Proposed Future Transit Alternatives

VRE Rail

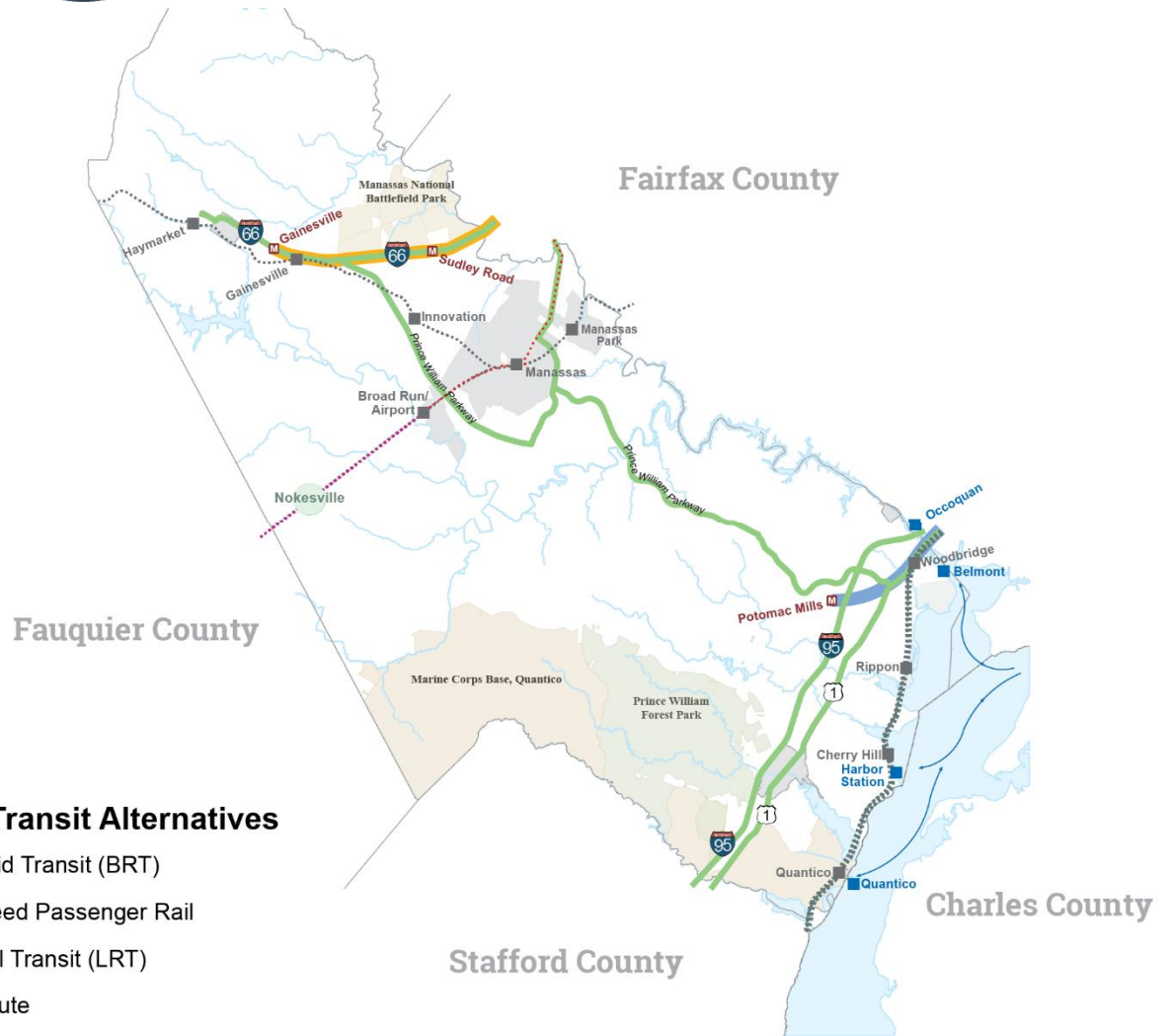
- Potential Station
- Existing or Planned Station
- Existing or Planned Line
- Future Line

METRO Rail

- Station
- Blue Line Extension
- Orange Line Extension

Additional Transit Alternatives

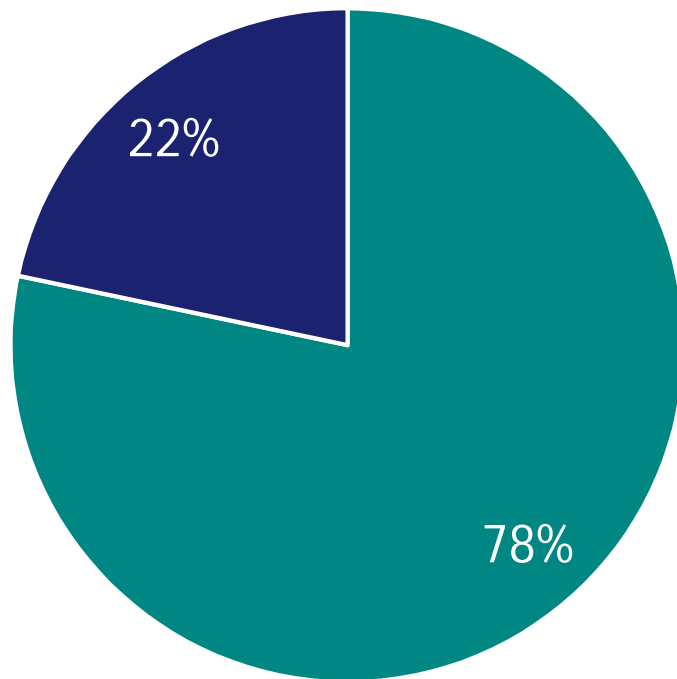
- Bus Rapid Transit (BRT)
- High Speed Passenger Rail
- Light Rail Transit (LRT)
- Ferry Route
- Ferry Terminal





Supporting Multimodal Travel

Park-and-Rides with PRTC Service (2016) –
Approximately 9,300 spaces

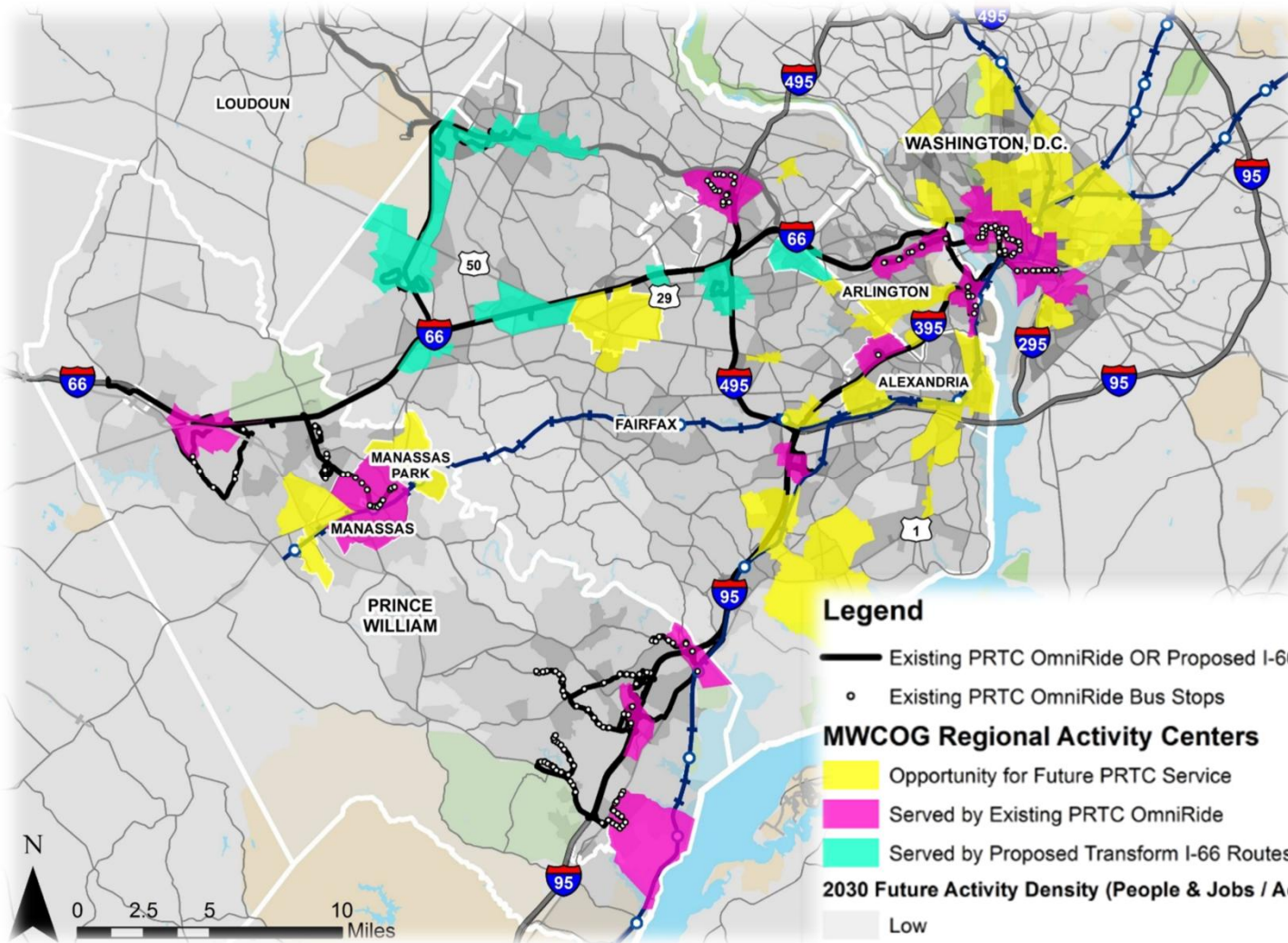


■ Occupied ■ Non-Occupied

- *Park-and-Ride lots with PRTC bus service are well-utilized, especially ones closest to interstates*
- *The Transform 66 Project includes approximately 4,000 new spaces along the I-66 Corridor with direct access to new Express Lanes*
- *Park-and-Ride lots also used for carpooling, vanpooling, and slugging*



Supporting Multimodal Travel



PRTC has the potential to increase its already extensive coverage of the region's activity centers



Supporting transit-oriented growth



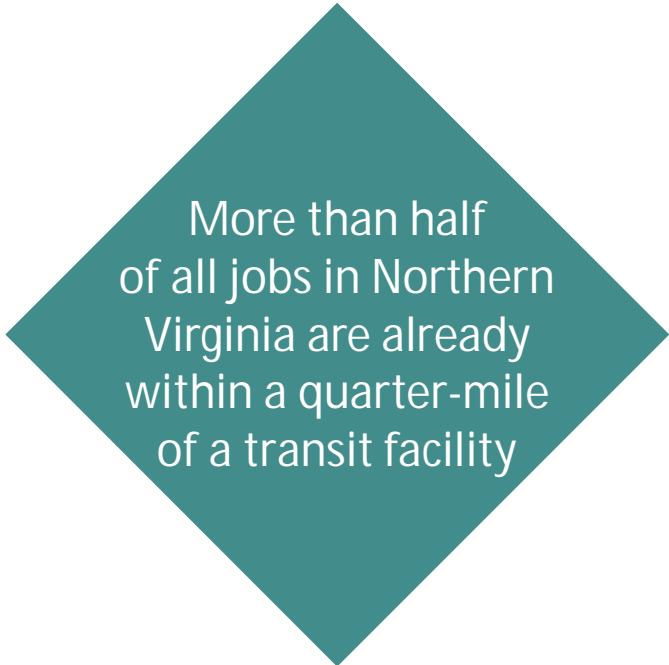


National/Regional Trends

- Mixed-use activity centers
- Decrease in auto-focused development

Common Objectives & Strategies

- Standards for new development to ensure accessibility to transit
- Complete Street policies
- Targeted growth areas

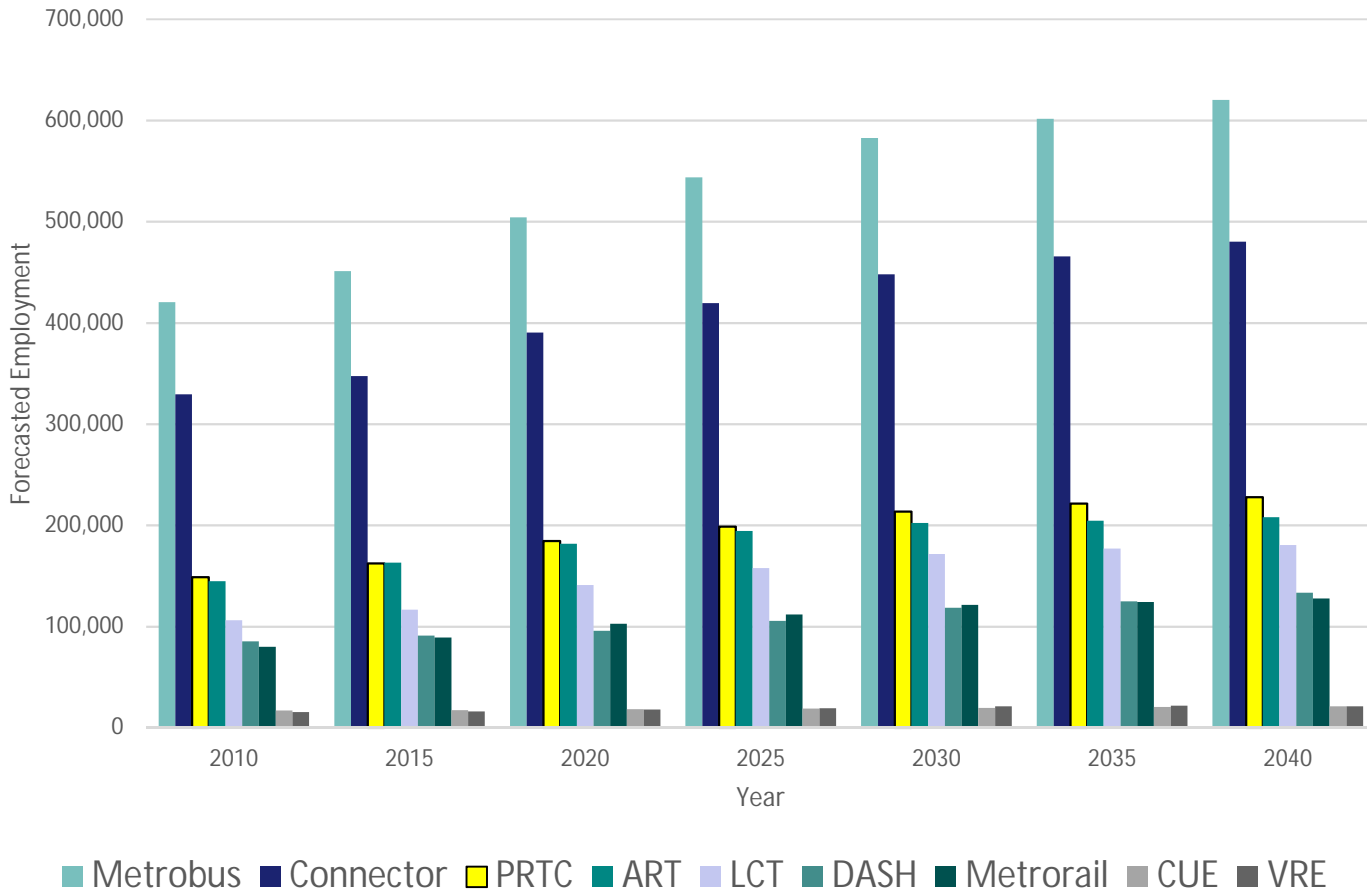


More than half
of all jobs in Northern
Virginia are already
within a quarter-mile
of a transit facility



Supporting Multimodal Travel

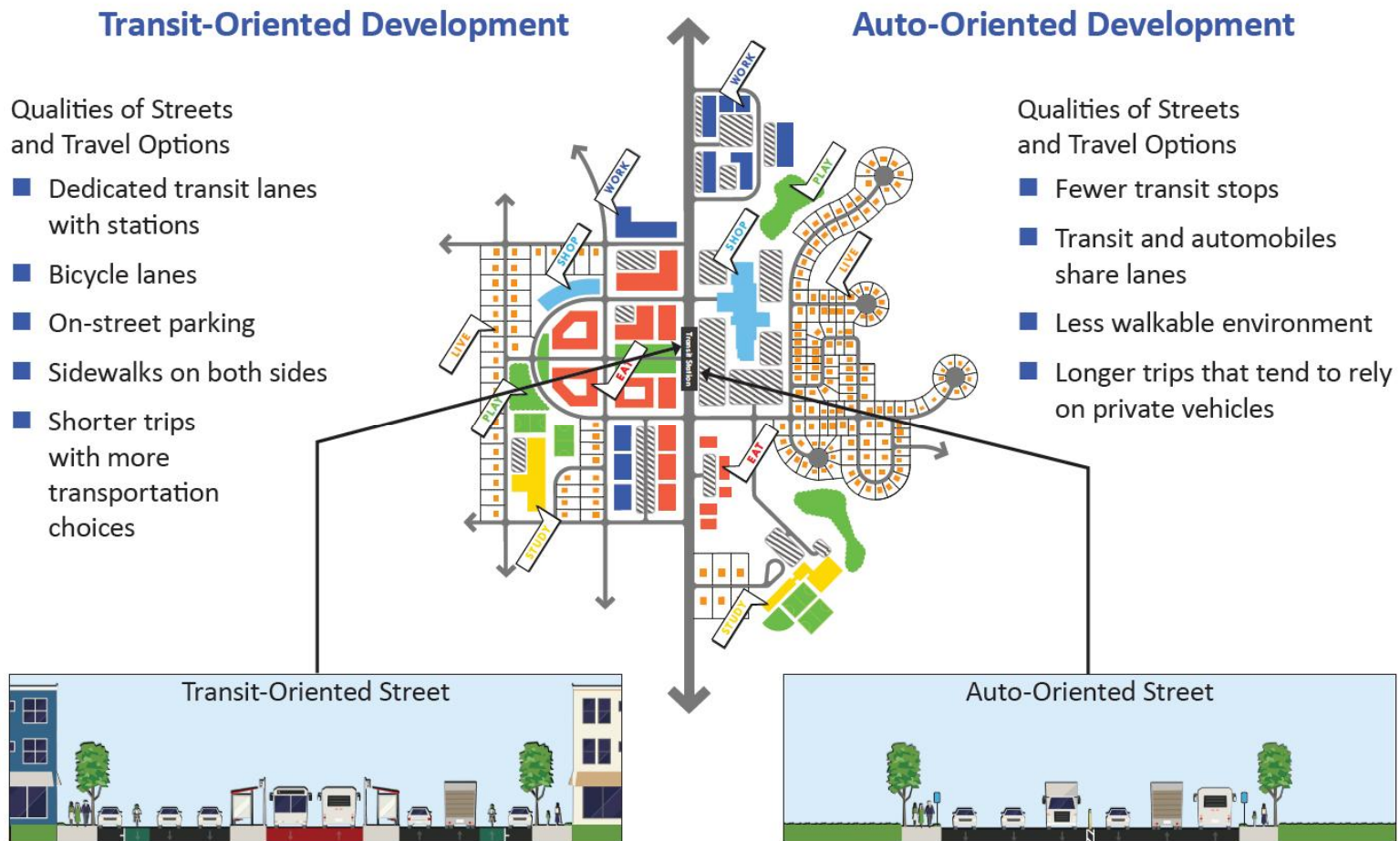
Forecasted Transit-Accessible Employment (MWCOC)



The number of jobs within PRTC service area is among the highest of Northern Virginia bus systems and is expected to grow

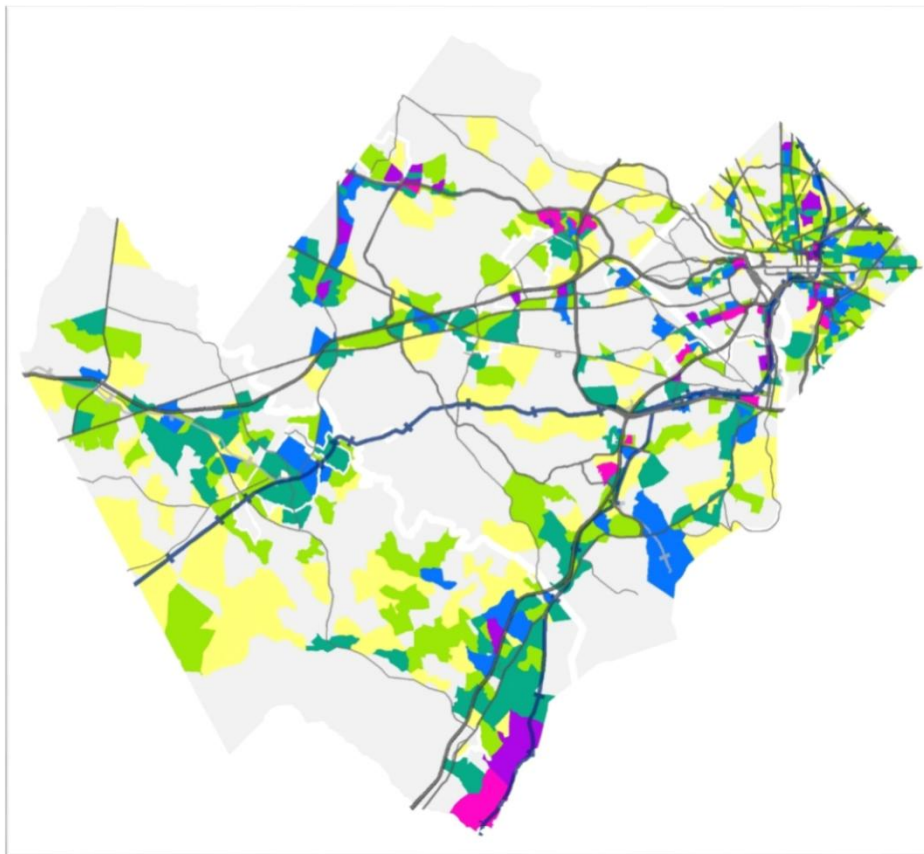


Nationally, regionally, and locally, jurisdictions and private developers are favoring a transit-oriented, mixed-use development approach (decreased emphasis on cars)





Localities with high growth must continue to put in place firm policies linking transportation and land use



Forecast Increase in Activity (Jobs + People)

2015 - 2040

- Fewer than 250
- 250 - 500
- 500 - 1,000
- 1,000 - 2,500
- 2,500 - 5,000
- 5,000 - 7,500
- More than 7,500

1.38M

forecasted new jobs and people within the PRTC bus service area by 2040

69%

forecasted growth in employment for PWC, Manassas, and Manassas Park

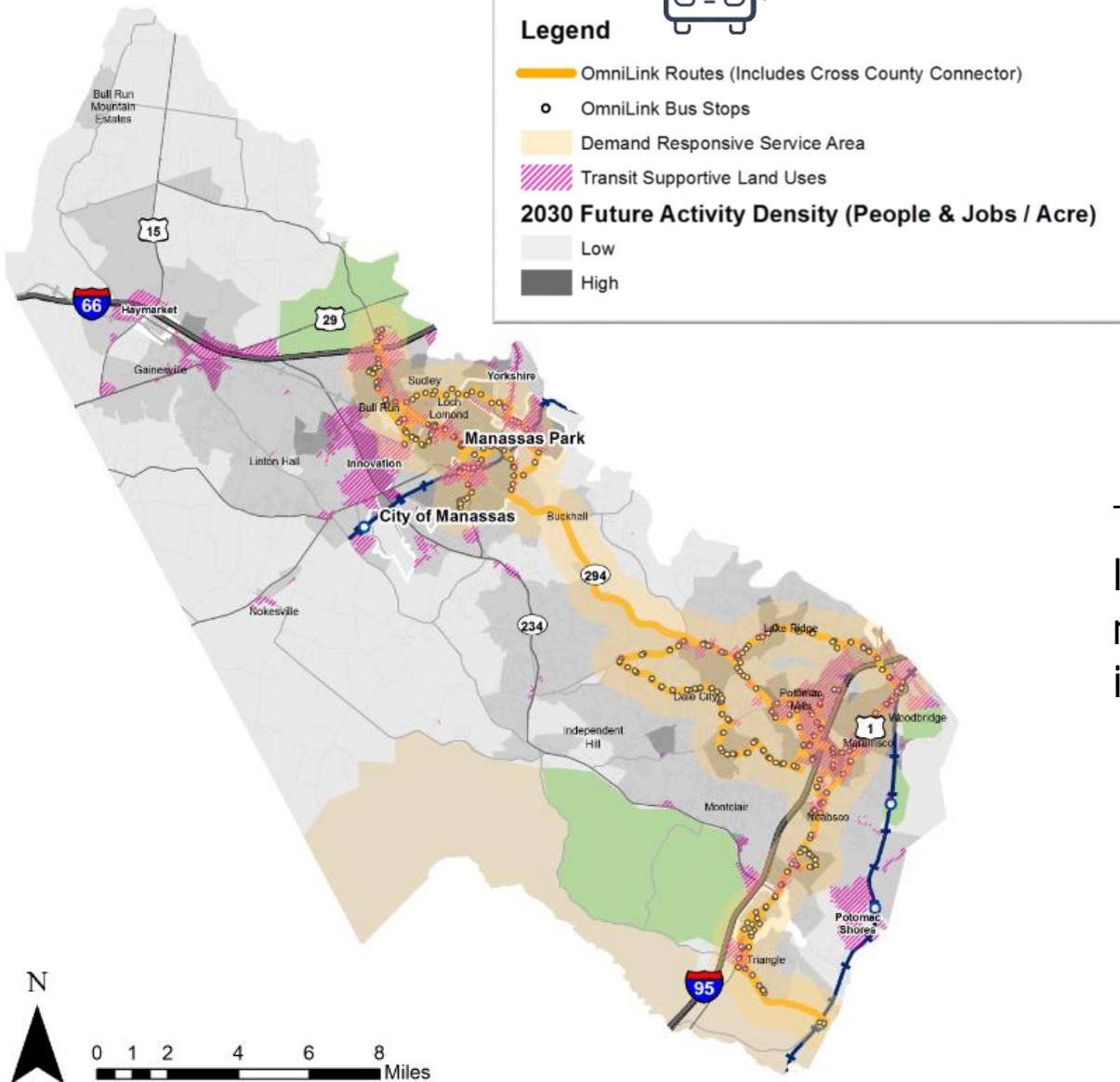
Source: MWCOG Round 8.4 Forecasts



Local entities around the Northern Virginia Region, including Prince William County, are adopting design guidelines to foster transit oriented growth

- Complete Streets
- Transit Service Level Requirements
- Lower Parking Minimums
- Enhanced Pedestrian and Bicycle Accommodation
- ADA Compliance





Transit-supportive areas in localities' future land use plans represent potential areas for increased transit service

