

REGIONAL TRANSPORTATION FOR A NEW NORMAL

Establishing a Baseline Understanding

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Overview

1. Baseline understanding on regional economy and travel before and during the COVID-19 pandemic
2. Impact of teleworking
3. Perceptions and expectations for the post-pandemic new normal
4. Potential Scenarios
5. Panel Discussion
6. Committee Discussion

COVID Cases & Deaths in Washington, DC Metro Area

	ON MARCH 1	DAILY AVG. IN LAST 7 DAYS	PER 100,000	14-DAY CHANGE	TOTAL REPORTED
Cases	738	1,018	16	-30% ↘	400,540
Deaths	54	50	0.80	+153% ↗	6,685

New cases



Deaths



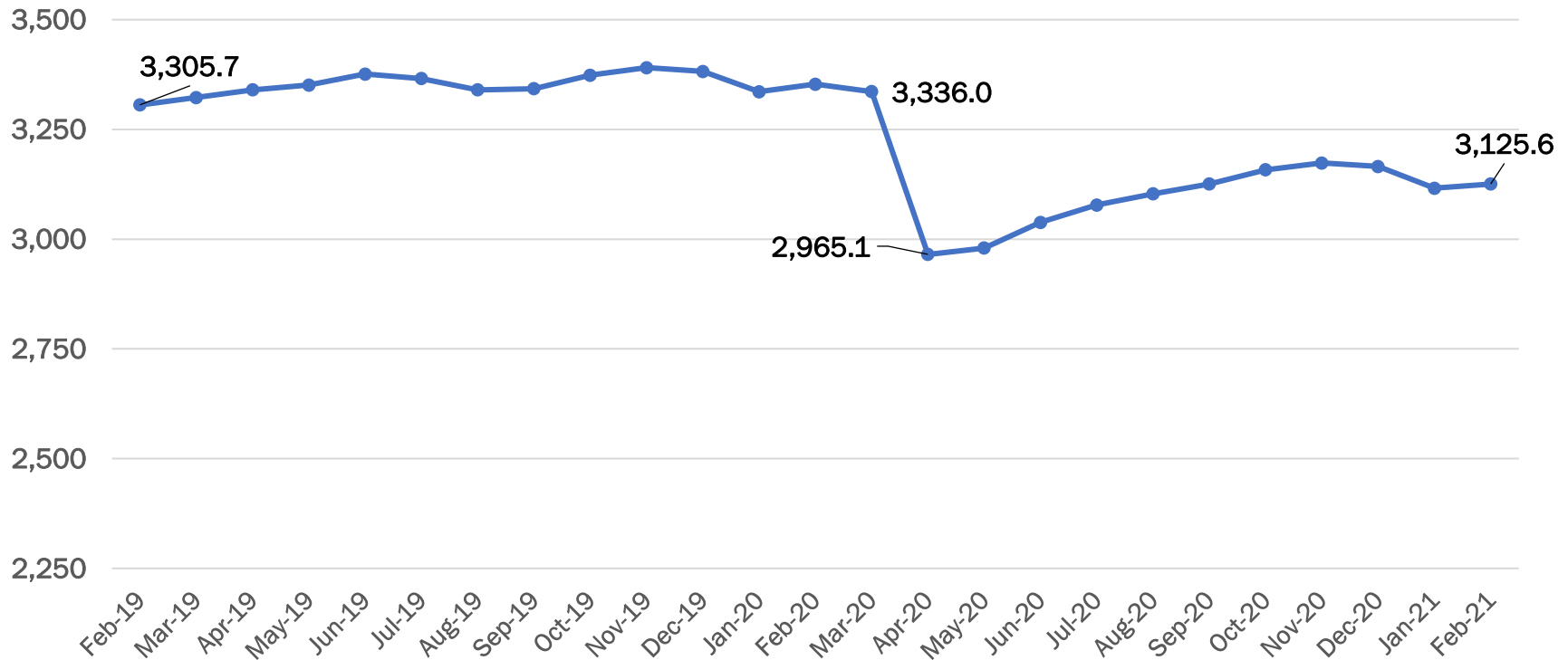
New York Times Cases & Deaths Tracker: <https://www.nytimes.com/interactive/2020/us/covid-cases-deaths-tracker.html#USA-MSA47900>. The Times uses reports from state, county and regional health departments.

March 1 Update: Over several days, Virginia added many deaths that occurred earlier in 2021.

Non-Farm Jobs (000s) - Washington MSA

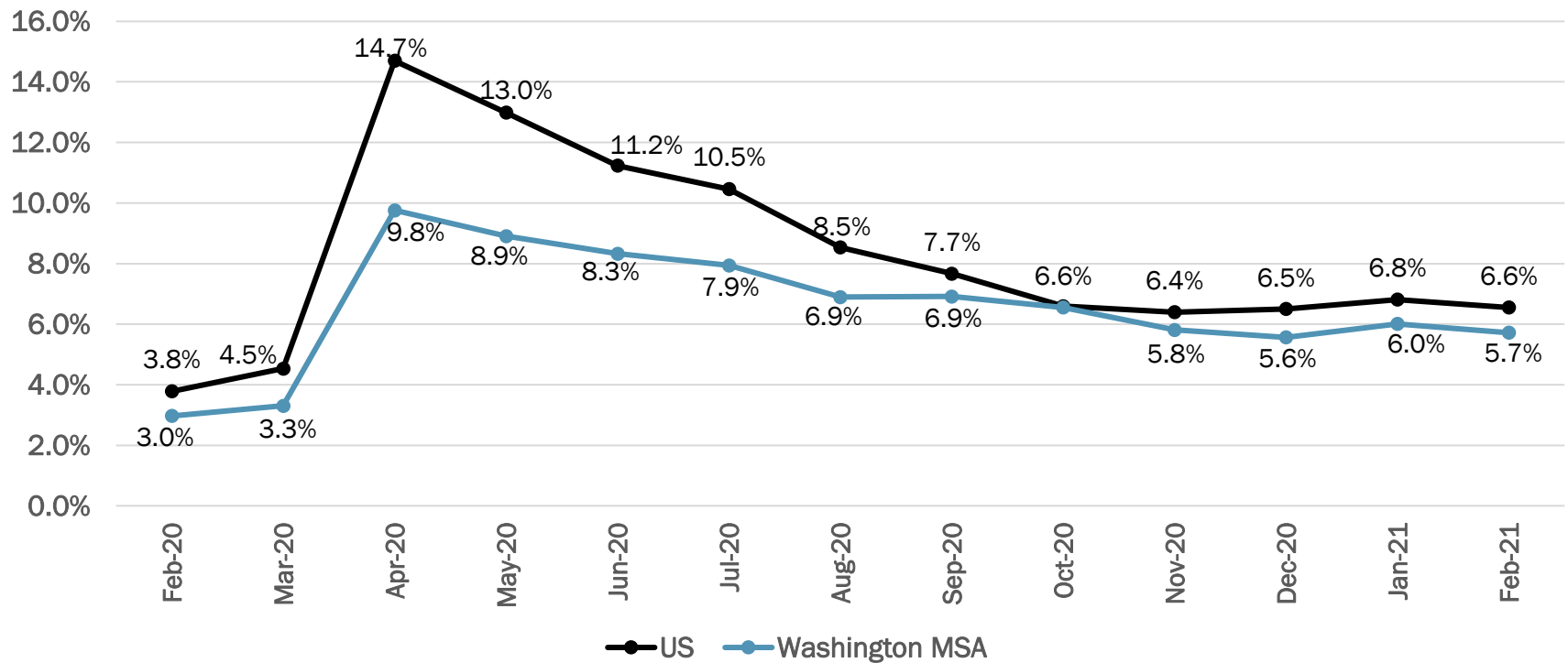
February 2019 to February 2021

(Bureau of Labor Statistics, Not Seasonally-adjusted, Thousands)



Revised BLS data show the region lost 370,900 jobs between March and April of 2020. As of February 2021, 160,000 jobs have been added during our partial reopening.

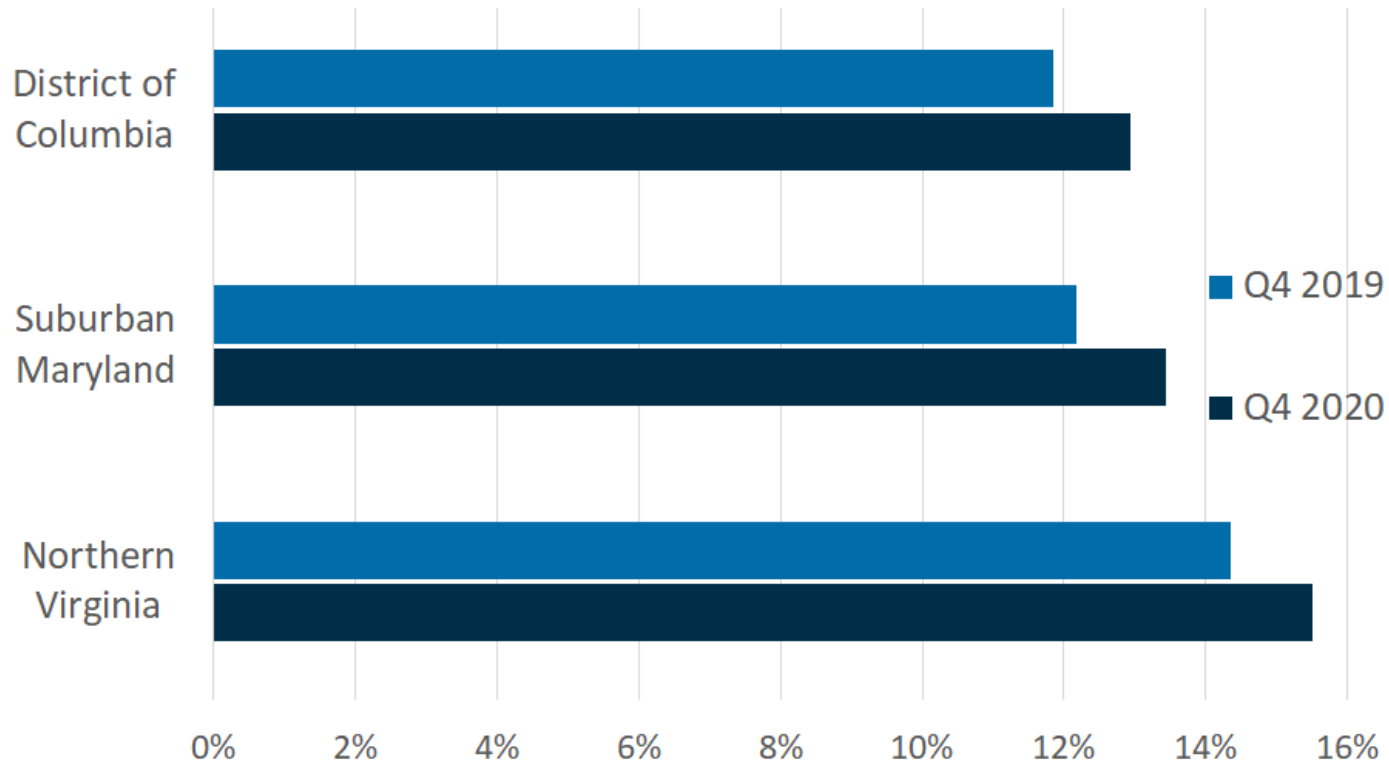
Unemployment Rate Washington MSA and US



Our unemployment rate nearly tripled with the onset of the pandemic but was still nearly 5 points below the nation. With partial reopening, the national and local rates did converge in October, but the local rate for subsequent months is again below the national rate.

Change in Office Vacancy Rates Q4 2019 vs Q4 2020

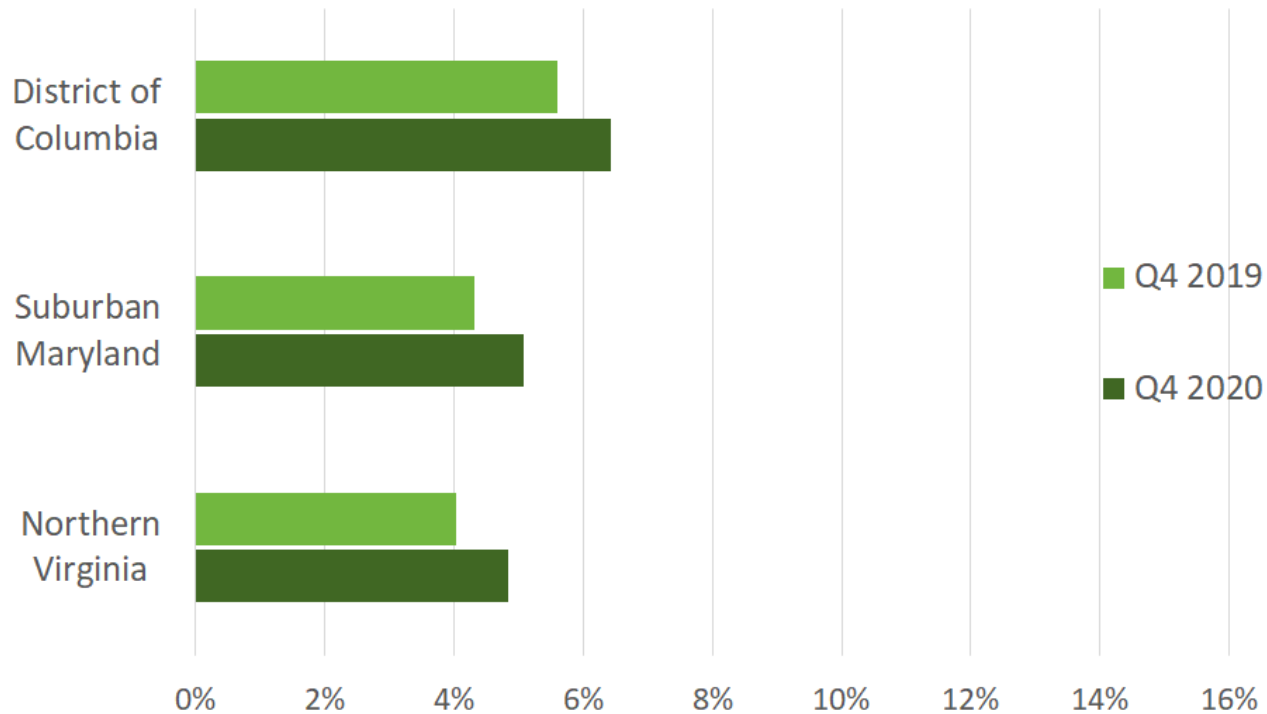
(Source: CoStar)



Office vacancy rates have increased slightly throughout the region. Office leases are for longer-term periods and will be monitored for changes.

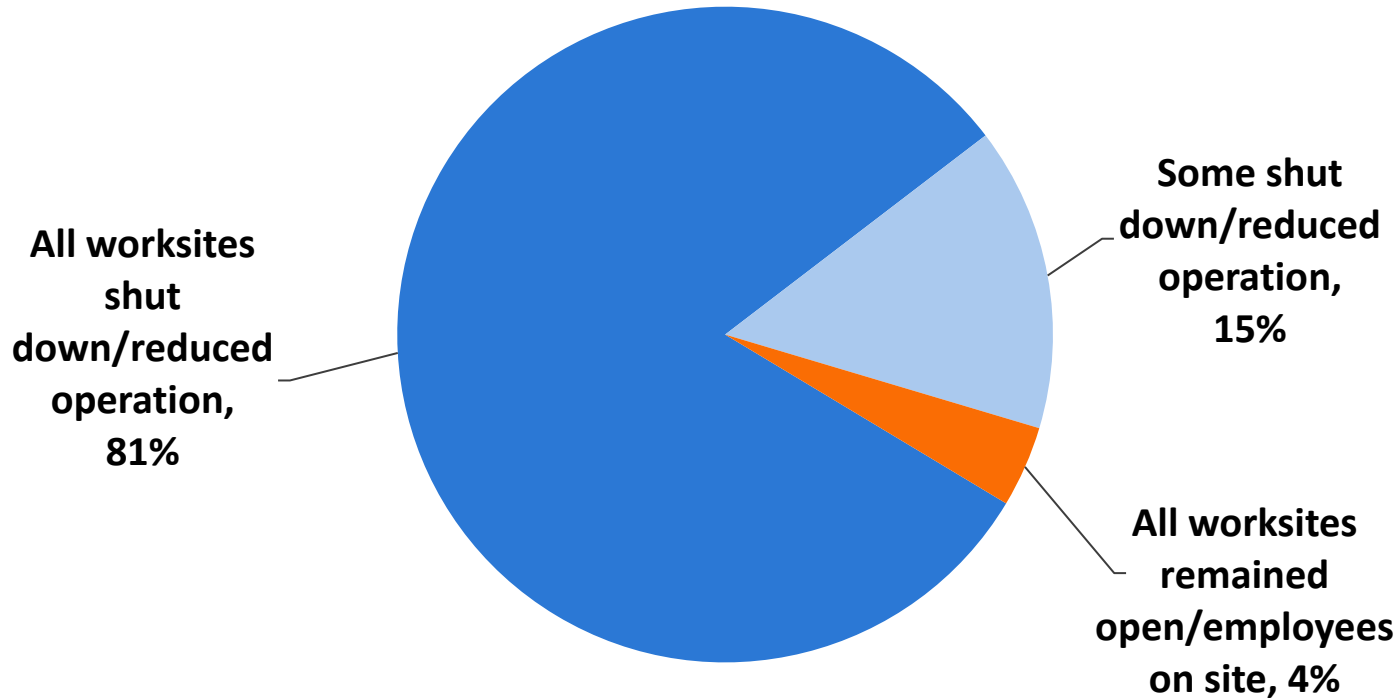
Change in Retail Vacancy Rates Q4 2019 vs Q4 2020

(Source: CoStar)



Retail vacancy rates have also increased slightly throughout the region. Retail space is very susceptible to COVID-related closures and will also be monitored.

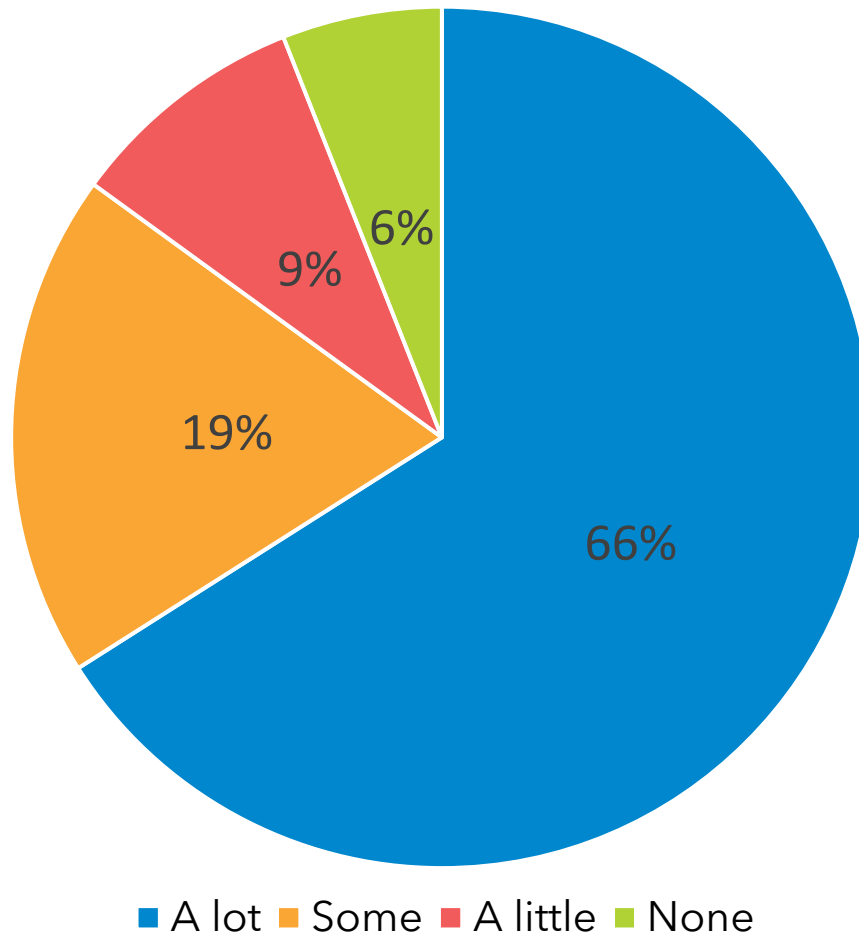
Worksite Operations



Source: Commuter Connections 2020 Employer Telework Survey

96% of Worksites Shut Down or Reduced On-site Operation Either Completely (81%) or Partially (15%) Since Coronavirus Pandemic Began

Change in Daily Travel Since March 2020

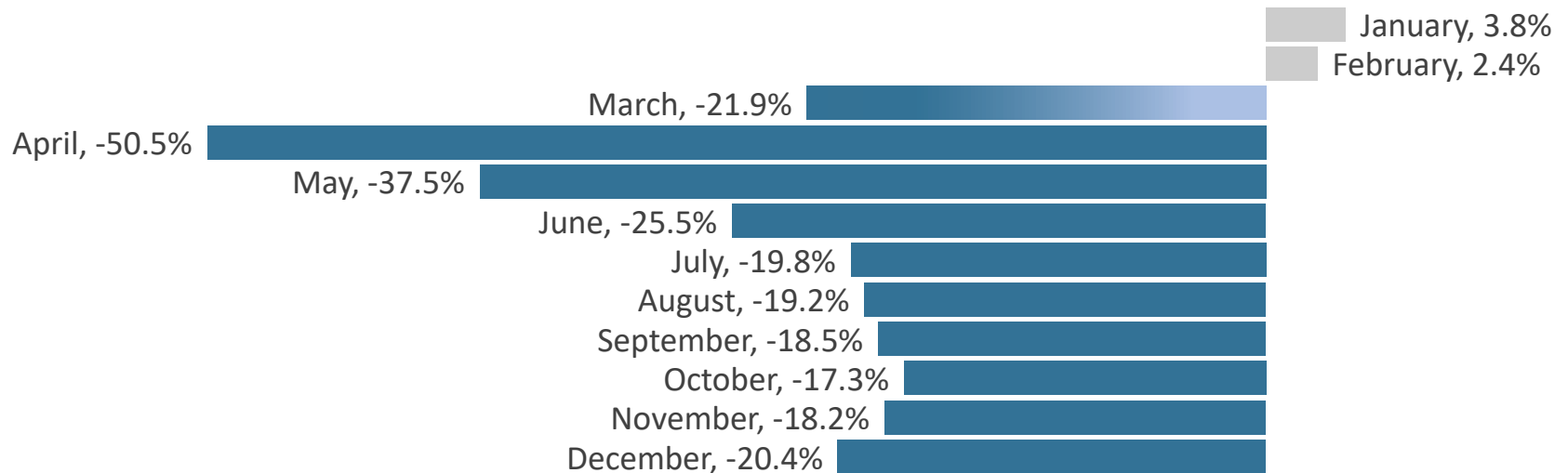


Two-thirds of respondents report their daily travel habits have changed a lot since the beginning of the COVID-19 pandemic.

Source: COG/TPB "2020 Voices of the Region Survey," 2021.

Roadway Traffic Volumes: Region

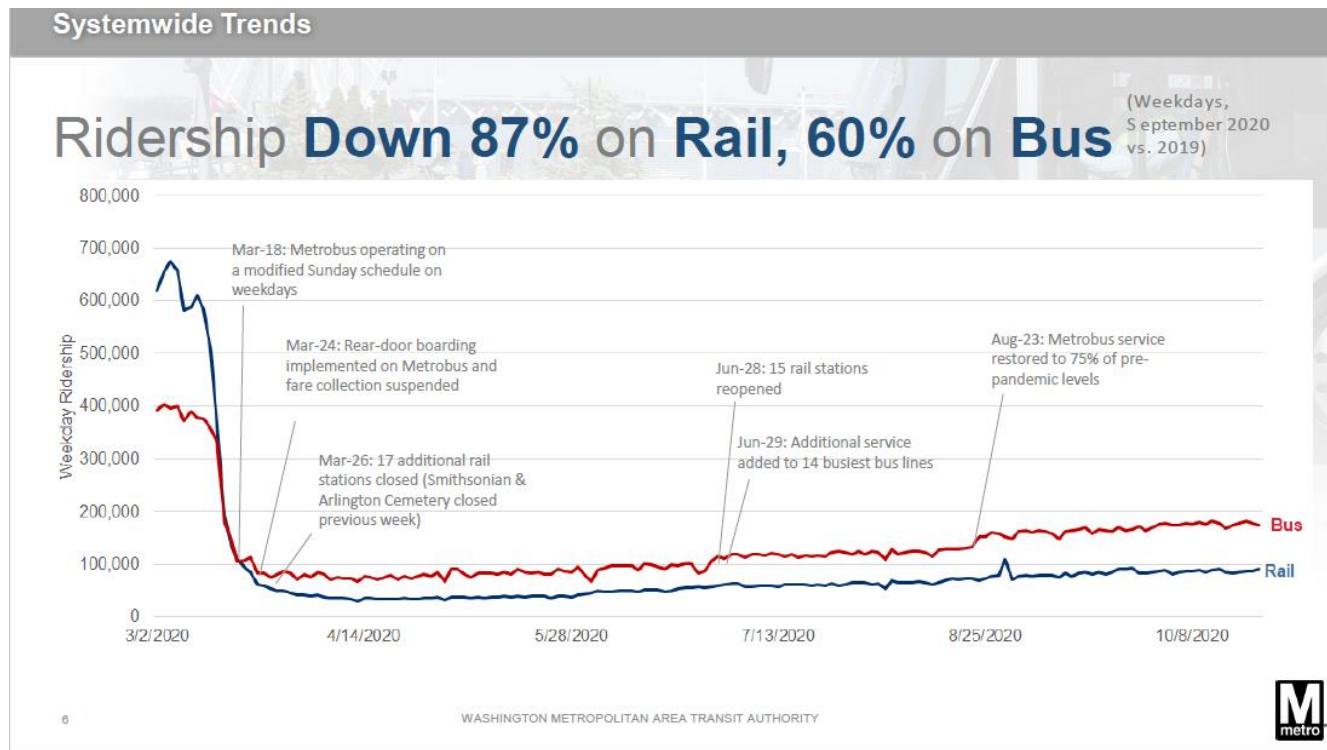
TPB Region - Monthly Average Percent Change from Equivalent 2019 Month



Source: COG/TPB

Regional traffic volumes, which in April 2020 had dipped below 50% of 2019 volumes, had recovered to over 80% of 2019 volumes by July, and continued a slow recovery through October 2020. Volumes, however, decreased once again region-wide in November and again in December 2020.

Metrorail and Metrobus Ridership



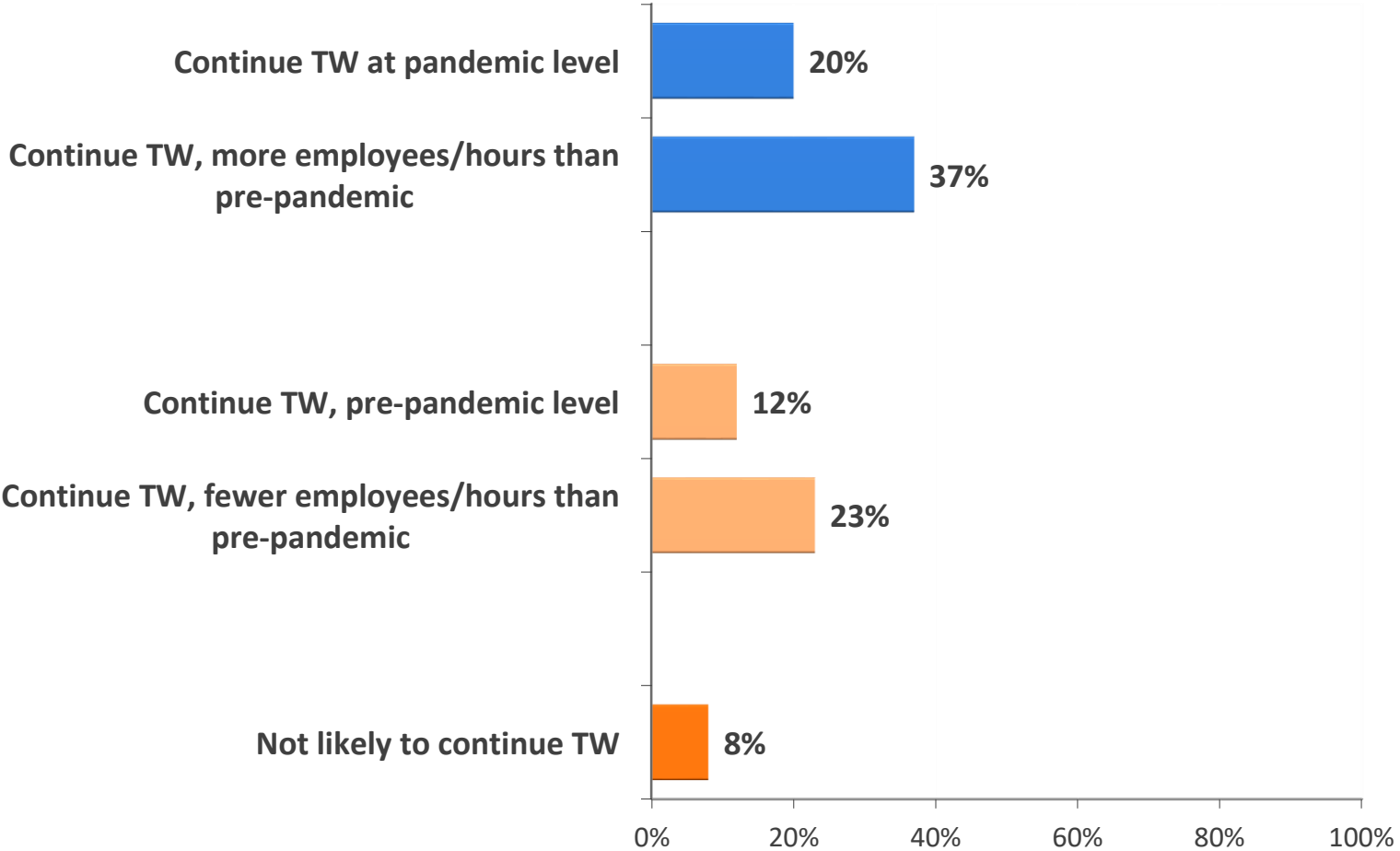
WMATA Regional Bus Ridership Workshop, November 17, 2020. COVID Ridership Trends, Diane Patterson.

Ridership decreased as a result of both reduced demand and reduced transit capacity, underscoring the complex interrelationship of supply and demand on transit. This contrasts to roadway volume decreases, which resulted from demand reductions.

Telework in the National Capital Region Pre-Pandemic

- Typical weekday telecommuting (2019 SOC)
 - 10% of work trips not made on roads, transit, walk/bike
- Telework eligibility (2017/2018 RTS):
 - 32% of workers are eligible to telecommute
 - 9% of workers are eligible but choose not to telecommute
 - 59% of workers are not eligible to telecommute
- Frequency of telework (2017/2018 RTS)
 - 36% telework less than one weekday a week
 - 62% telework at least one weekday a week

Anticipated Post-Pandemic Teleworking

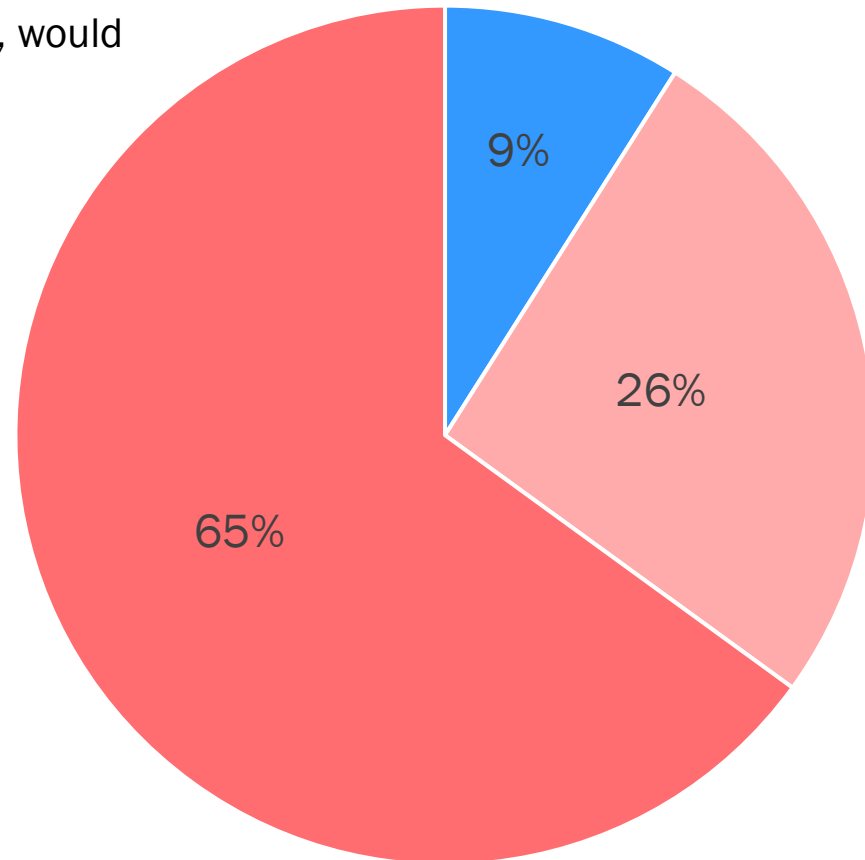


Source: Commuter Connections 2020 Employer Telework Survey

Preferences of Current Teleworkers

If given the choice to return to a work location once the COVID-19 pandemic is over, would you prefer to...?

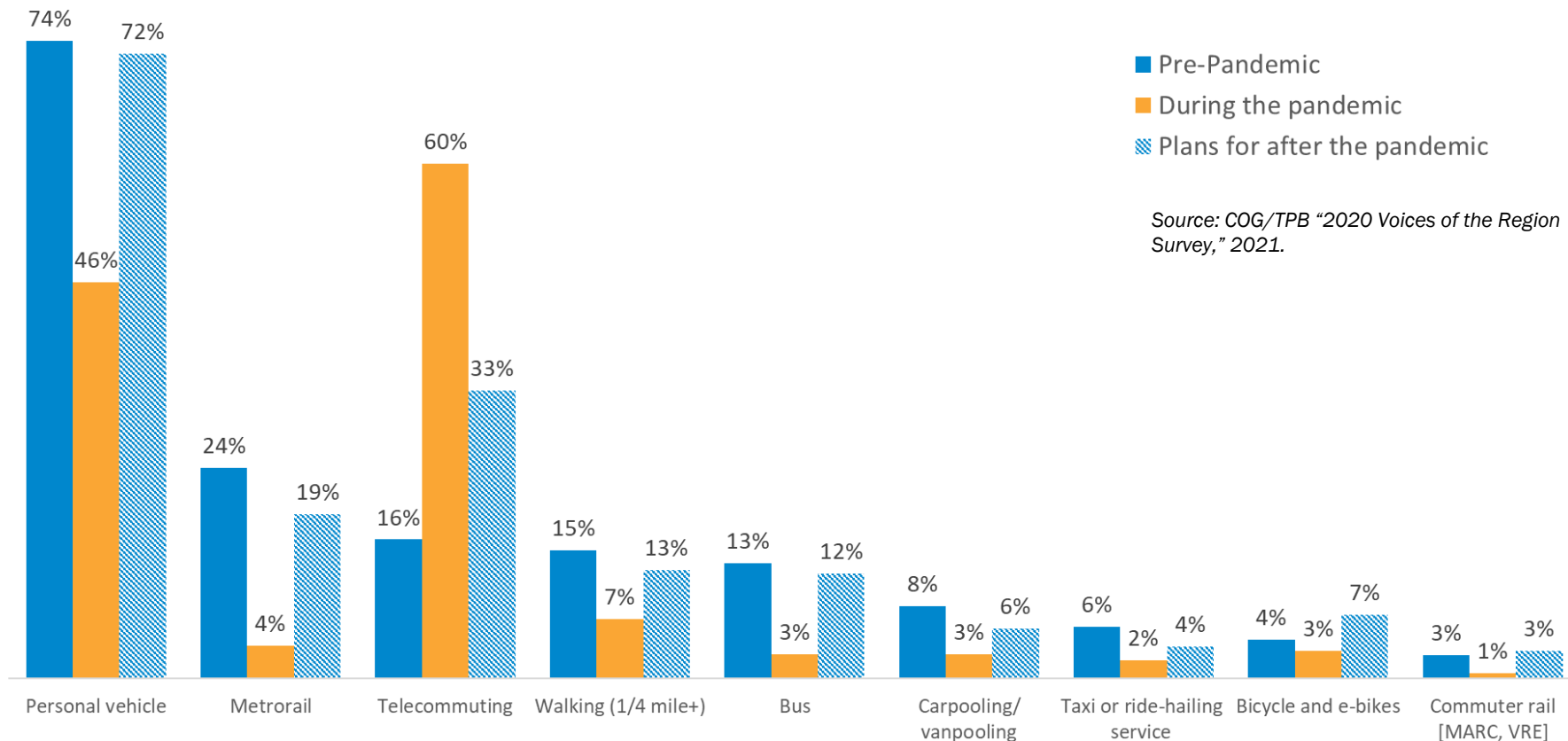
- Return to work location full-time
- Telework full-time
- Telework some days and commute to work location some days



Source: COG/TPB "2020 Voices of the Region Survey," 2021.

Commute Mode




Commute mode used at least once a week



Source: COG/TPB "2020 Voices of the Region Survey," 2021.



Potential Scenarios

1. Return to Pre-Pandemic Conditions  Everything goes back to the way it was
2. Land Use and Travel Patterns Change But Regional Long-Term Growth Unaffected  Teleworking influences land use and travel patterns, but workers remain in the region
3. Regional Long-Term Growth as well as Land Use and Travel Patterns Change  Teleworking causes significant cultural shift
Workers can move away and do their jobs from elsewhere

Scenario 1: Return to Pre-Pandemic Conditions

- Following recovery period, the region reverts to “old” normal
- Regional growth projections are unaffected
- Telework patterns return to pre-pandemic levels
- Regional travel, including commuting, return to pre-pandemic levels
- Essential front-line workers still needed to support the regional economy

Scenario 2: Land Use and Travel Patterns Change But Regional Long-Term Growth Unaffected

- Following period of transition, increased teleworking takes hold
- Demand for and use of office/commercial space may be influenced
- Housing location choices may not be tied as strongly to proximity to worksite (i.e., commute length/time less of a consideration)
- Regional composition of industry sectors and supporting workforce does not change
- Essential front-line workers still needed to support the regional economy

Scenario 3: Regional Long-Term Growth as well as Land Use and Travel Patterns Change

- Teleworking takes a significant regional and societal hold resulting in many workers, who can telework, not feeling tied to live in the same region where their jobs are “located.”
- Outmigration of components of the workforce may influence composition of employment sectors in the region
- Changing economy may influence demand for talent
- Essential front-line workers still needed to support the regional economy

Considerations

- How will teleworking influence land use development and travel patterns in the region?
- How will housing demand, including location, be influenced?
- Will the fundamental social and economic structure of the region's economy undergo change?
- What transportation investments are needed to meet demands of a new normal AND meet ongoing demands of essential workers and elements of the region that will go unchanged?
- How does the region balance the critical need to respond to new short-term realities after the pandemic while continuing to make long-term land use and transportation decisions for our communities?

Panel Discussion

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Office of Planning

Washington Metropolitan Area Transit Authority

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