

# REGIONAL TRANSPORTATION FOR A NEW NORMAL

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## Establishing a Baseline Understanding

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June 4, 2021

# Overview

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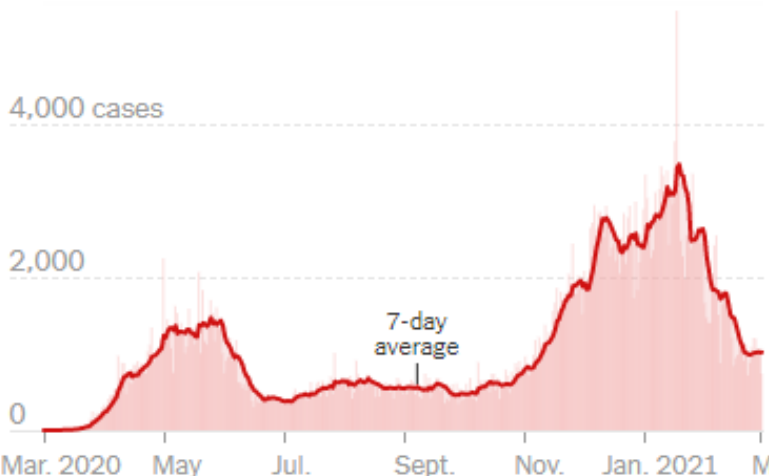
1. Baseline understanding on regional economy and travel before and during the COVID-19 pandemic
2. Impact of teleworking
3. Perceptions and expectations for the post-pandemic new normal
4. Potential Scenarios
5. Committee Discussion



# 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.

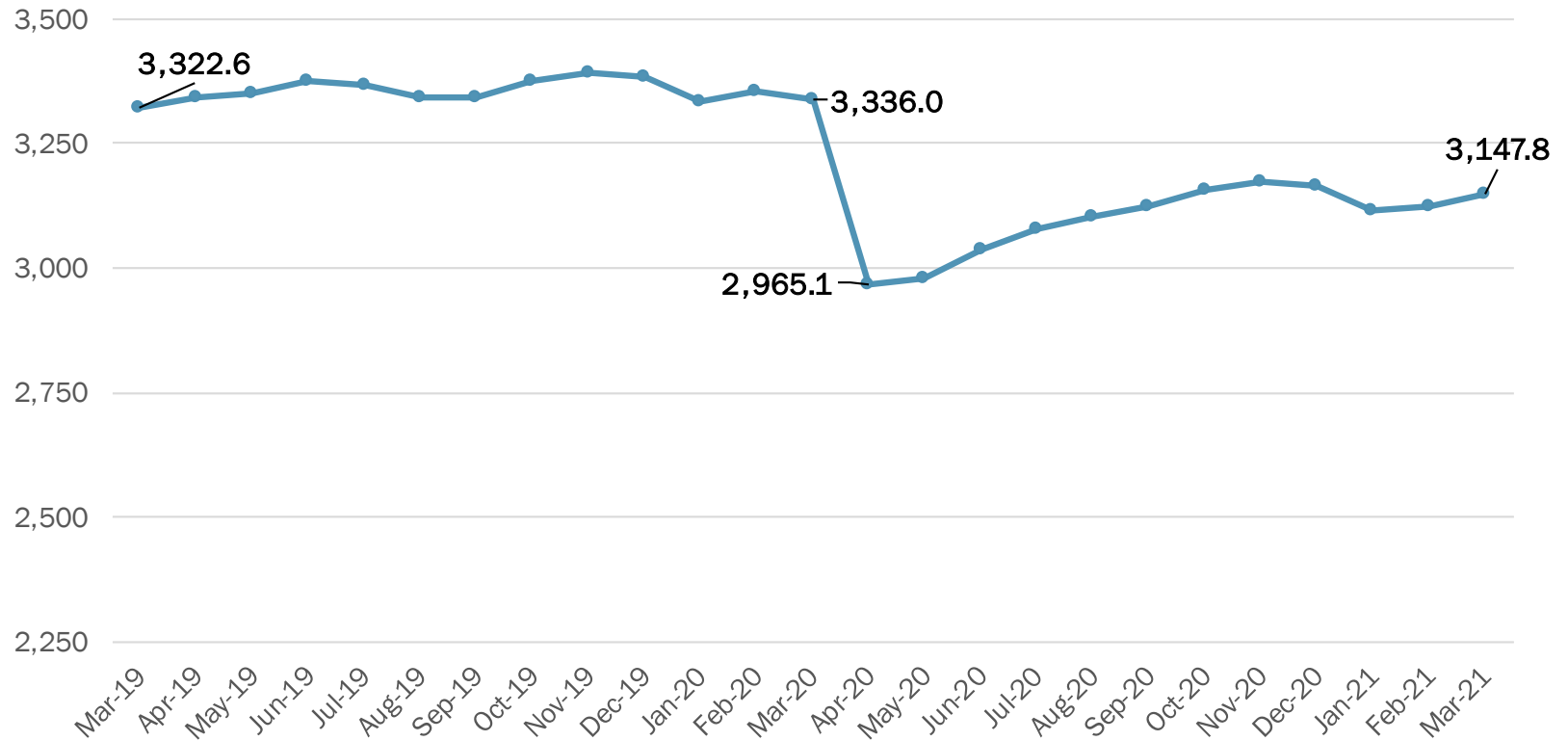
**March 1 Update:** Over several days, Virginia added many deaths that occurred earlier in 2021.



# Non-Farm Jobs (000s) - Washington MSA

March 2019 to March 2021

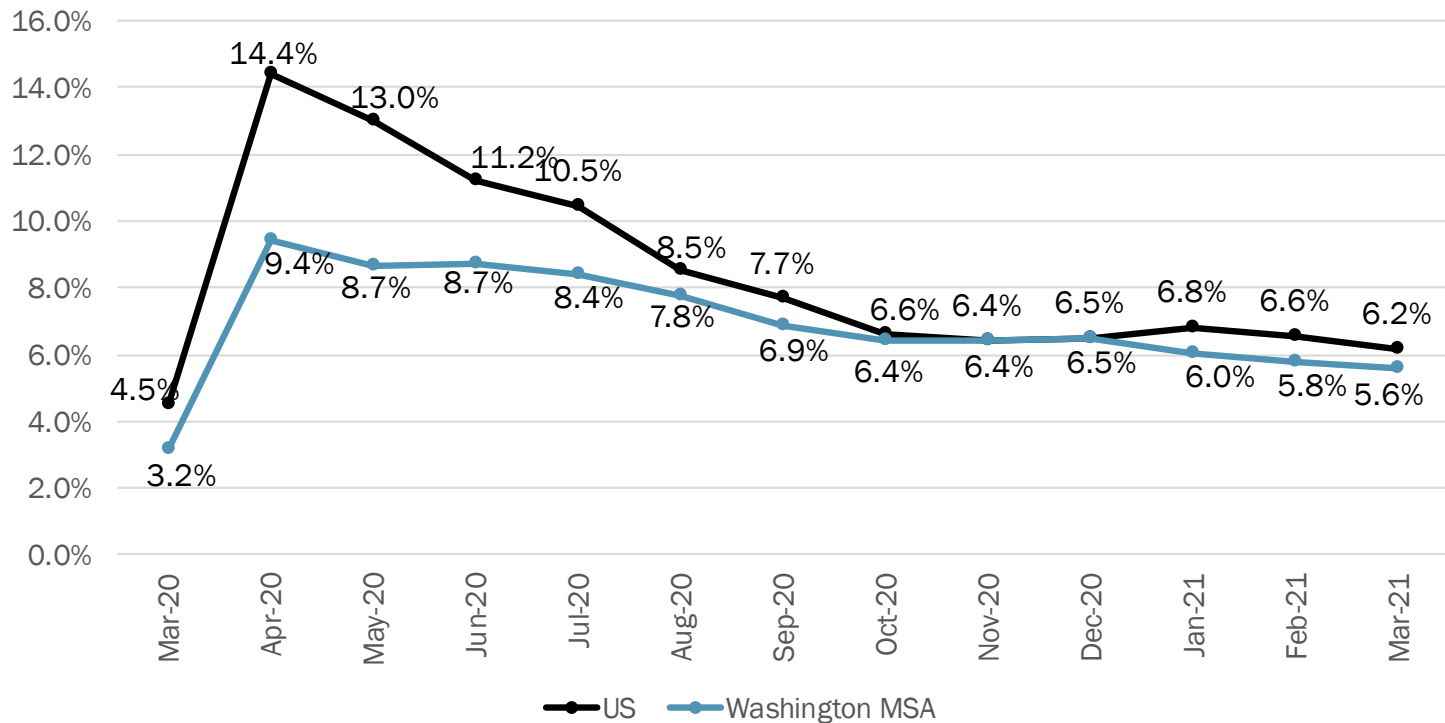
(Bureau of Labor Statistics, Not Seasonally-adjusted, Thousands)



Revised BLS data show the region lost 370,900 jobs between March and April of 2020. As of March 2021, 182,700 jobs have been added during our partial reopening.



# Unemployment Rate Washington MSA and US

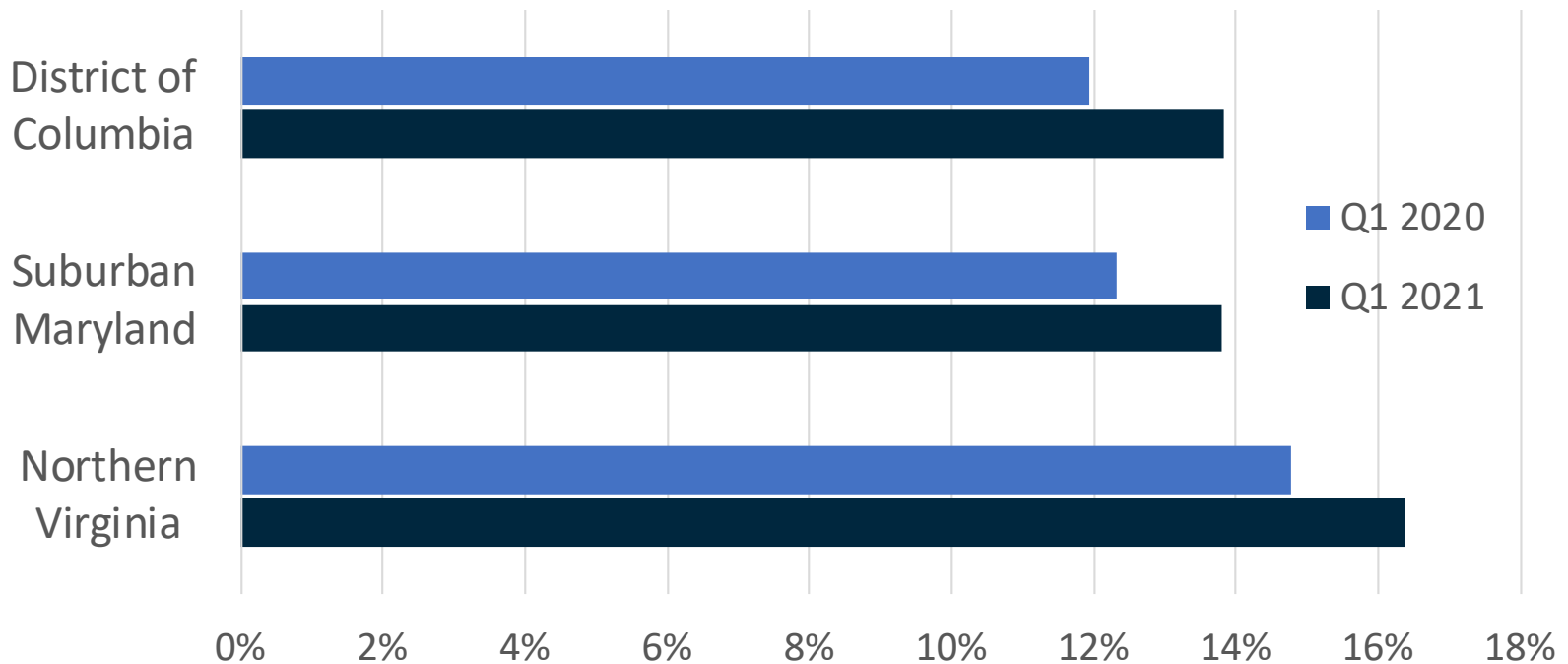


Our unemployment rate nearly tripled with the onset of the pandemic but was still nearly 5 points below the nation. With partial reopening, the national and local rates did converge in late 2020, but the local rate so far in 2021 is again below the national rate.



# Change in Office Vacancy Rates Q1 2020 vs Q1 2021

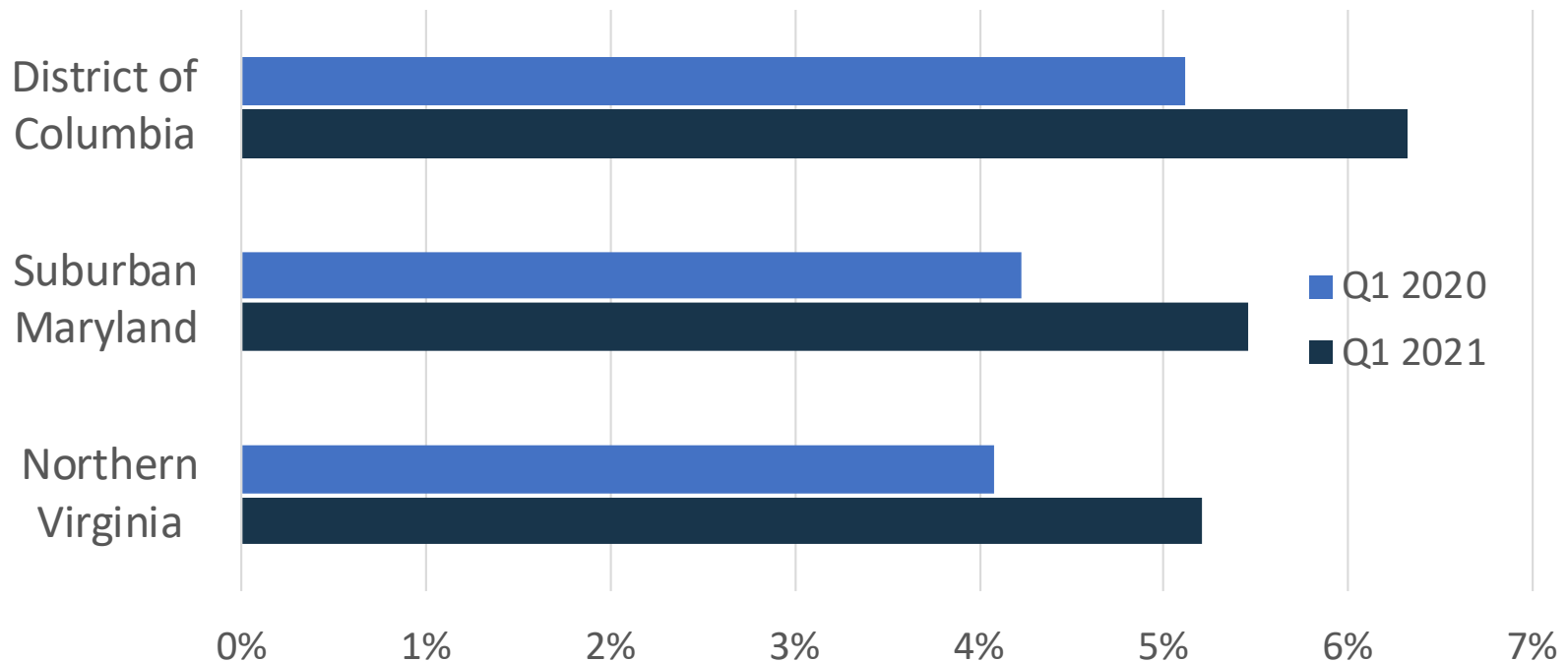
(Source: CoStar)



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

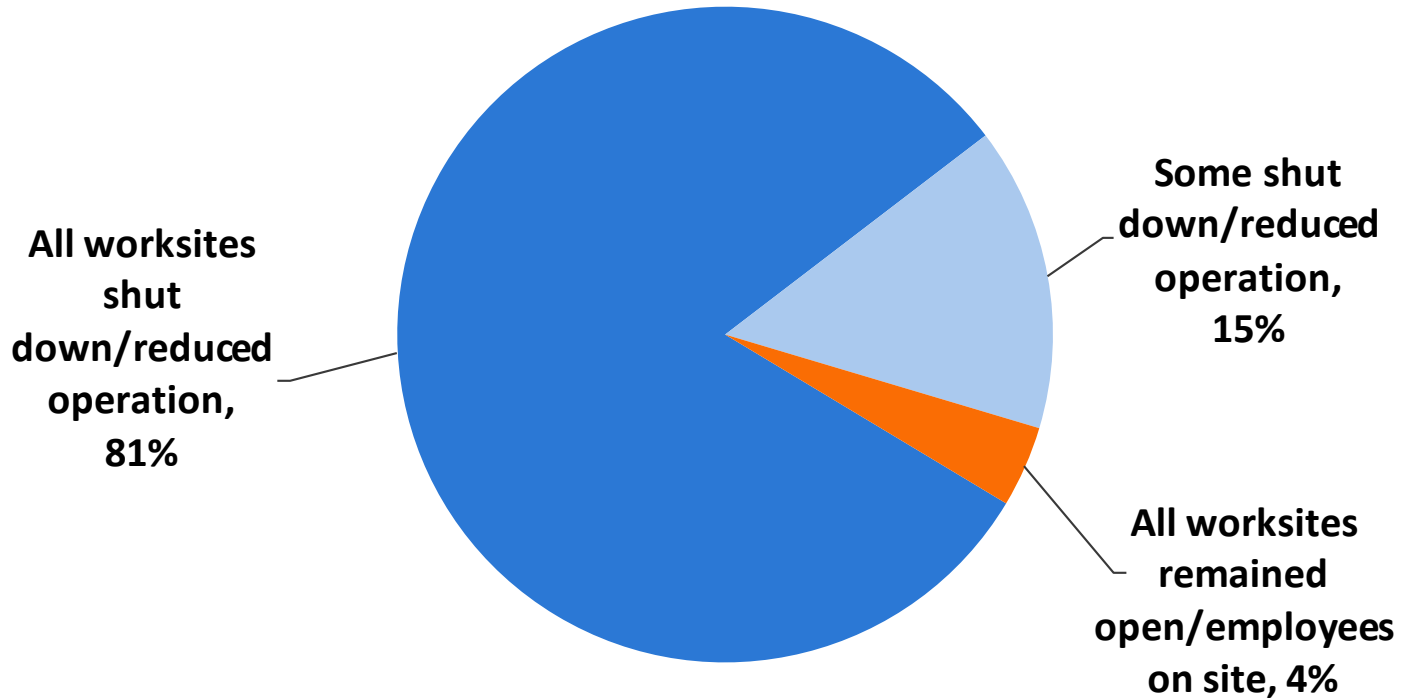
# Change in Retail Vacancy Rates Q1 2020 vs Q1 2021

(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



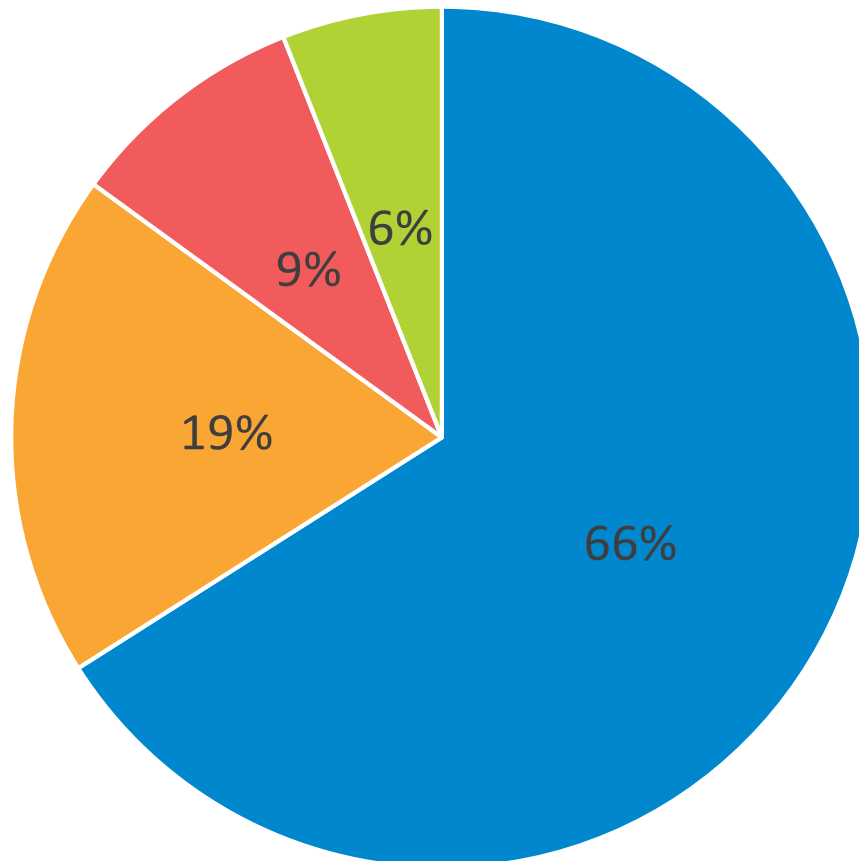
Source: Commuter Connections 2020 Employer Telework Survey

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



■ A lot ■ Some ■ A little ■ None

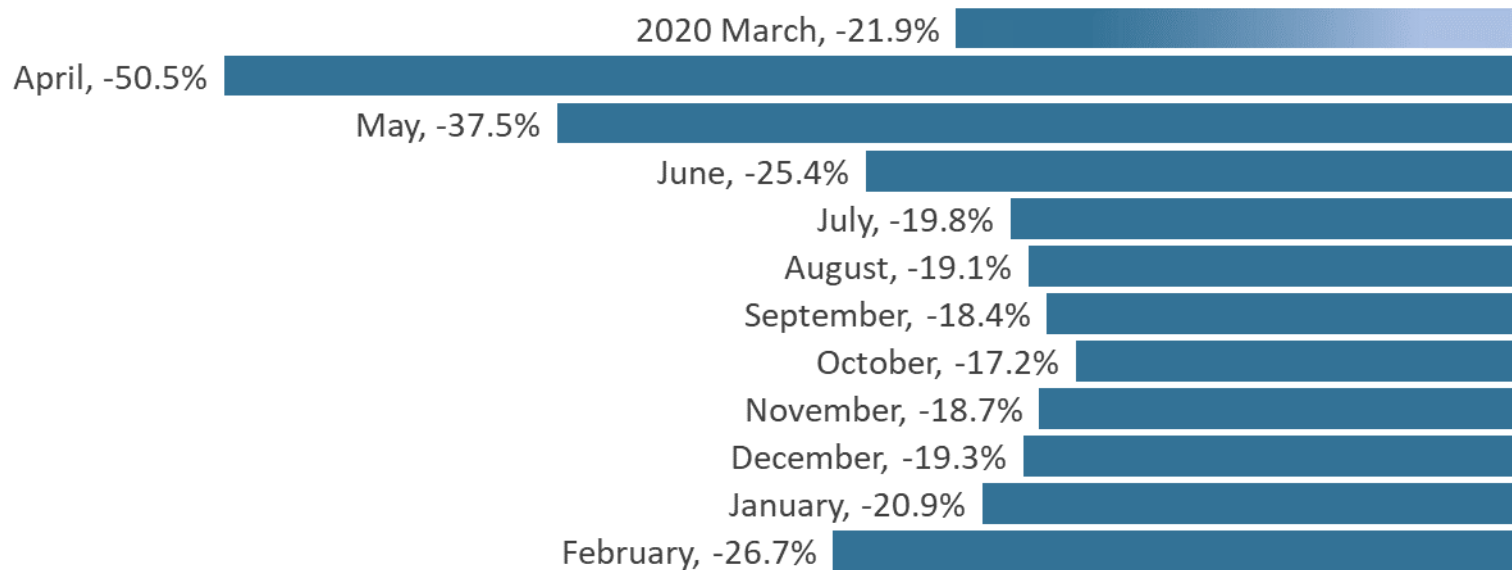
Two-thirds of respondents report their daily travel habits have changed a lot since the beginning of the COVID-19 pandemic.

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



# Roadway Traffic Volumes: Region

TPB Region - Average Percent Change from Equivalent Pre-pandemic Month

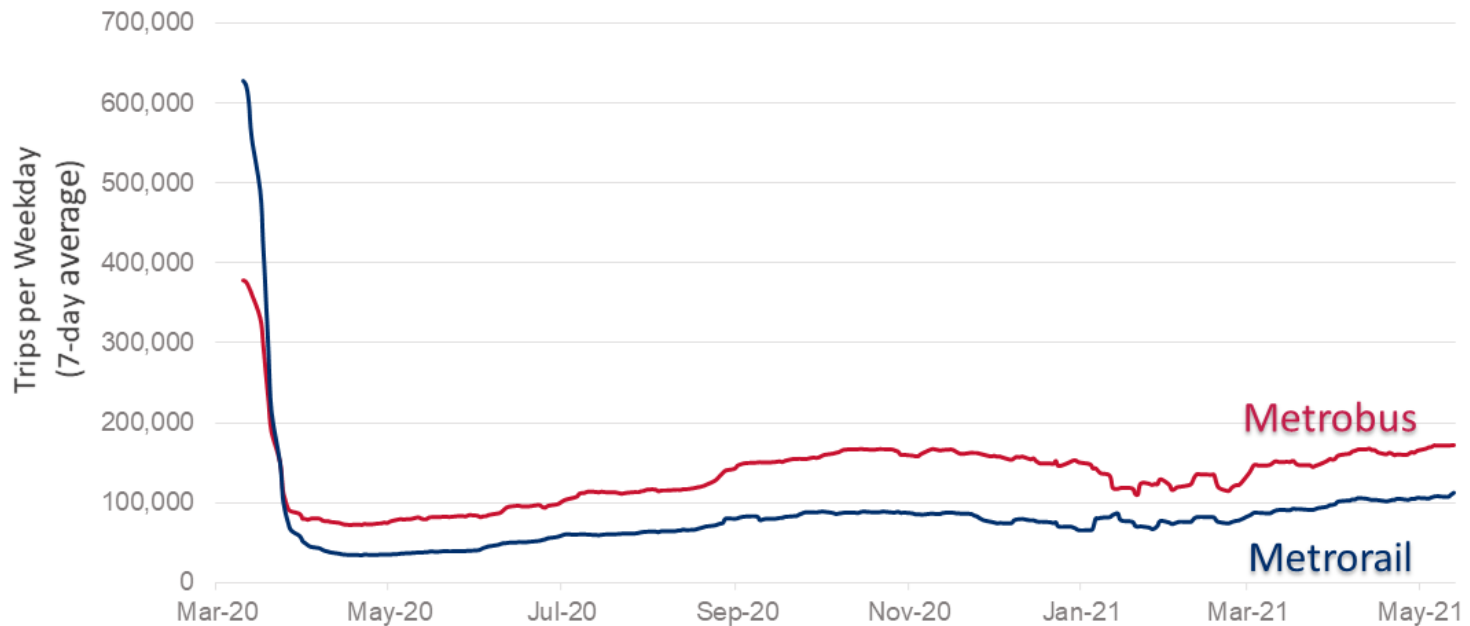


Source: COG/TPB

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 the following months.



# Metrorail and Metrobus Ridership



WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY



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.



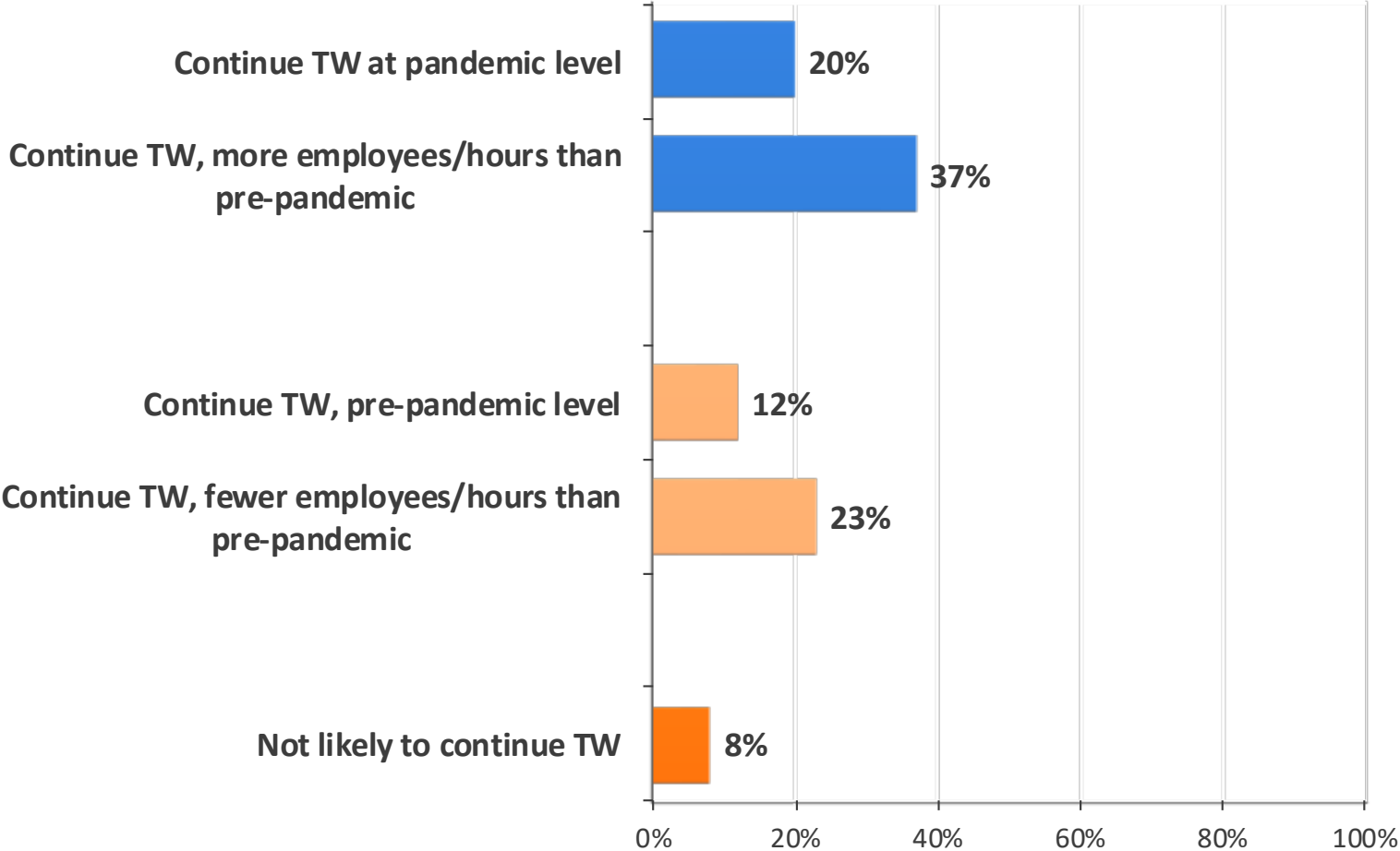
# Telework in the TPB Planning Region in 2017/2018

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- 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

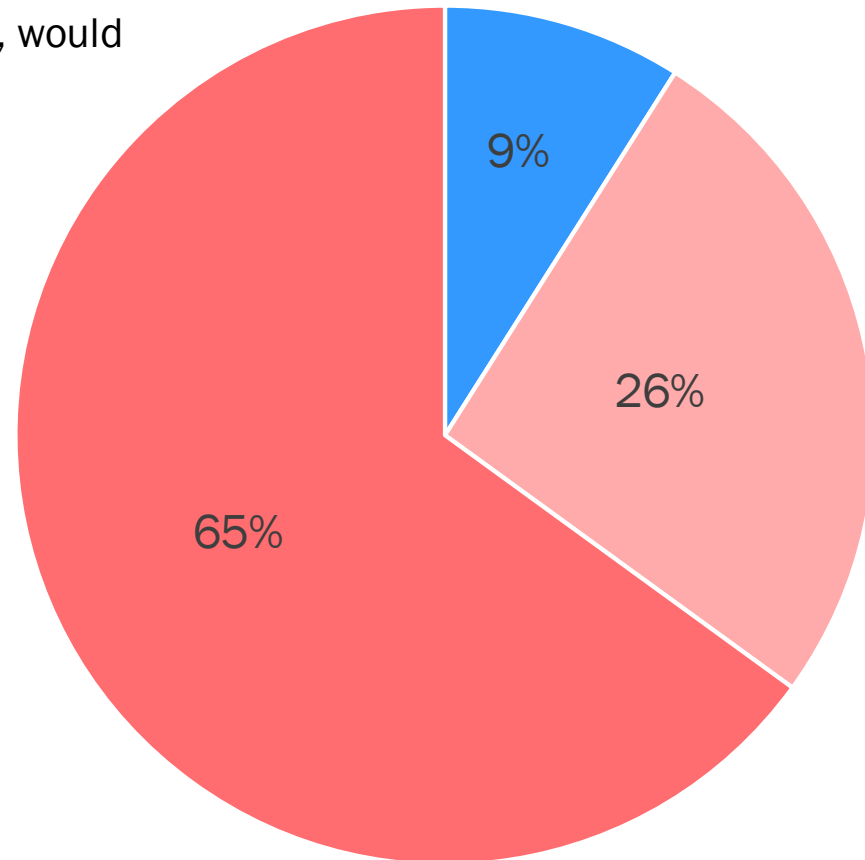


Source: Commuter Connections 2020 Employer Telework Survey

# Preferences of Current Telecommuters

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

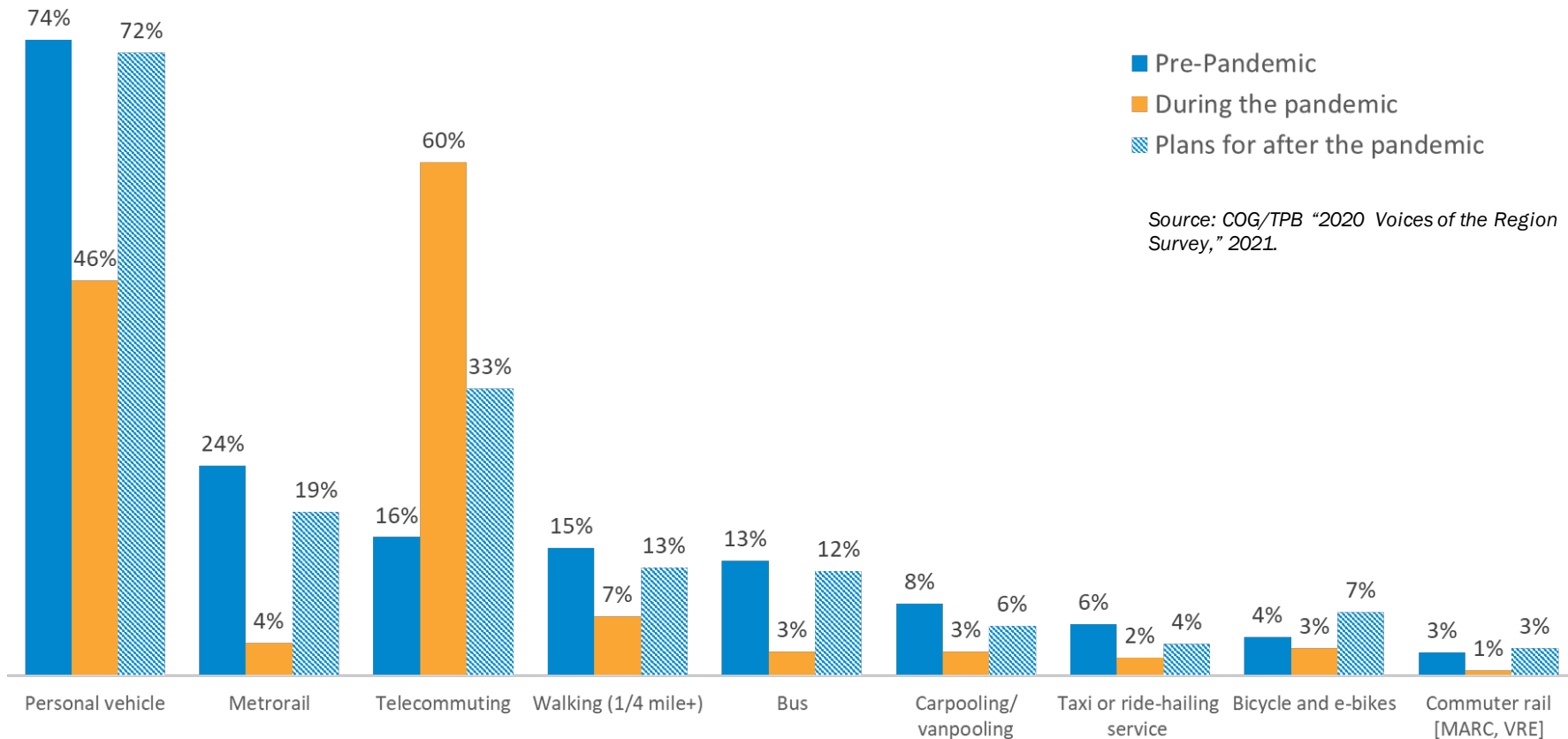


Source: COG/TPB "2020 Voices of the Region Survey," 2021.



# Commute Mode

Commute mode used at least once a week






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



# Potential Scenarios

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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

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- 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

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- 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

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- 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

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- After a period of transition into the post-pandemic reality, to what extent will teleworking influence land use development patterns and travel trends 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 must be made to meet the demands of a new normal as well as meet ongoing demands of essential workers and elements of the region that will go unchanged?
- How does the region balance the critical need to plan for and respond to new short-term realities after the pandemic while continuing to make long-term land use and transportation decisions for our communities?



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