

ITEM 8 – Information

January 21, 2021

Transportation Impacts of the COVID-19 Pandemic in the National Capital Region

Background:

The board will be briefed on updated information on the regional transportation impacts resulting from the COVID-19 pandemic as well a collaborative multisectoral analysis being undertaken by COG and TPB staff. The multisectoral analysis will examine impacts on transportation, the environment, the economy, and health and will provide a regional perspective on pandemic impacts to inform long term planning and programming activities.



MEMORANDUM

TO: Transportation Planning Board
FROM: Tim Canan, AICP, TPB Planning Data and Research Program Director
SUBJECT: COG/TPB Activities to Compile COVID-19 Transportation Impacts Information
DATE: December 8, 2020

Numerous actions have been taken to contain the pandemic spread of the COVID-19 virus and to mitigate COVID-19's threat to personal and public health. These actions have affected socio-economic activities throughout the country, including the Washington metropolitan area. The impacts of the pandemic have been significant, and it is necessary to understand the full depth and breadth of these impacts in the region from a broad context.

In his October 15, 2020 memorandum to the Transportation Planning Board (TPB), Andrew Meese, TPB Systems Performance Planning Director, indicated that COG and TPB have commenced an effort to examine the impacts of COVID-19 on the region from a multisectoral perspective. Sectors in this analysis include transportation, the economy, the environment, and health. Staff from COG's Departments of Transportation Planning, Community Planning and Services, and Environmental Programs are collaborating to compile relevant data and information that help portray the broad context of the pandemic in the region from this perspective.

Because of the complexity of some of the data as well as notable lags in data availability for some key indicators, staff has grouped the multisectoral analysis activities into two distinct phases: 1) near-term activities, which entail compiling and presenting data that are already available and can readily be presented, and 2) longer-term activities, which will require obtaining data that may not yet be available and conducting a deeper dive into the complex interrelationships of these data sources. Staff is currently in the process of making initial presentations of data and findings from the near-term activities to various Boards and committees within COG and TPB. The TPB will be briefed at its December 16, 2020 meeting on the first of these analyses as well as on the overall approach for conducting the multisectoral analysis for assessing the impacts of COVID-19 in the region.

TRANSPORTATION IMPACTS OF THE COVID-19 PANDEMIC IN THE NATIONAL CAPITAL REGION

Tim Canan, AICP
Planning Data and Research Program Director

Transportation Planning Board
January 21, 2021

Overview

- Numerous actions have been taken to contain the pandemic spread of COVID-19 and to mitigate its threat to personal and public health.
- These actions have restricted socio-economic activities throughout the country, including the metropolitan Washington area.
- Staff from various COG departments are collaborating to develop a snapshot summary of observed impacts on the region from a multisectoral perspective.
- Sectors of analysis include:
 - Health
 - Economy
 - Transportation (Roadways and Public Transportation)
 - Environment

Overview

- A multisectoral approach will provide a snapshot summary of impacts from a broader perspective to provide more context.
- Analyses and findings, while empirical, are intended to provide a general contextual understanding of the impacts and are not intended to constitute a comprehensive “deep dive.”
- Analyses will measure what has occurred and will not be predictive in nature due to remaining uncertainties.
- Presentations to be made in two phases:
 - *Near-term Activities*: readily available data that can be presented to stakeholders starting in December.
 - *Longer-term Activities*: data collection and analysis activities that may take longer to complete



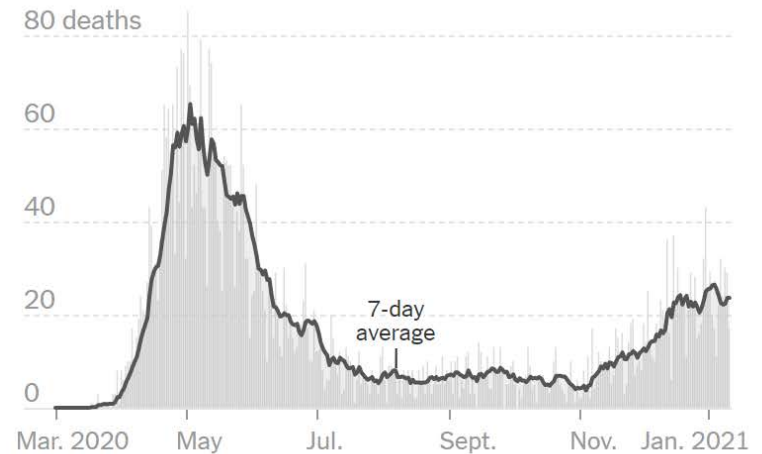
COVID Cases & Deaths in Washington, DC Metro Area

	ON JAN. 10	DAILY AVG. IN LAST 7 DAYS	PER 100,000	14-DAY CHANGE	TOTAL REPORTED
Cases	3,321	2,922	47	+14% →	303,734
Deaths	17	24	<1	+15% →	5,220

New cases

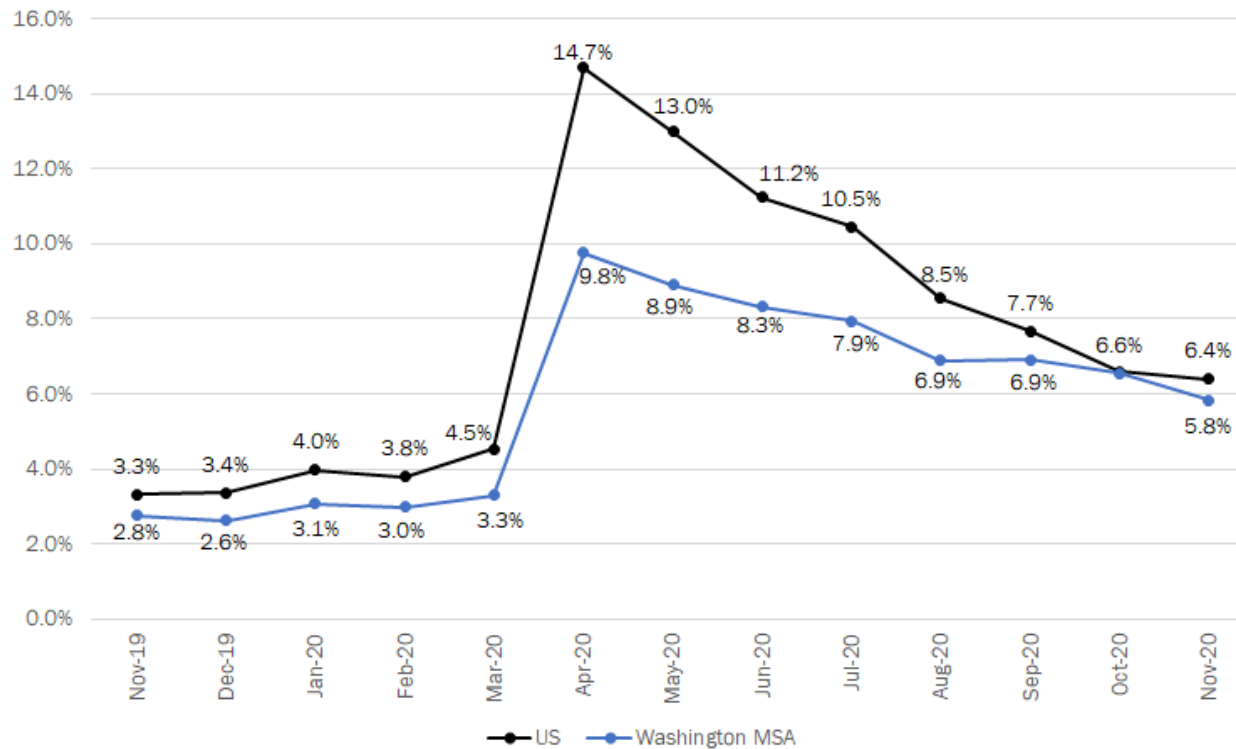


Deaths



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.

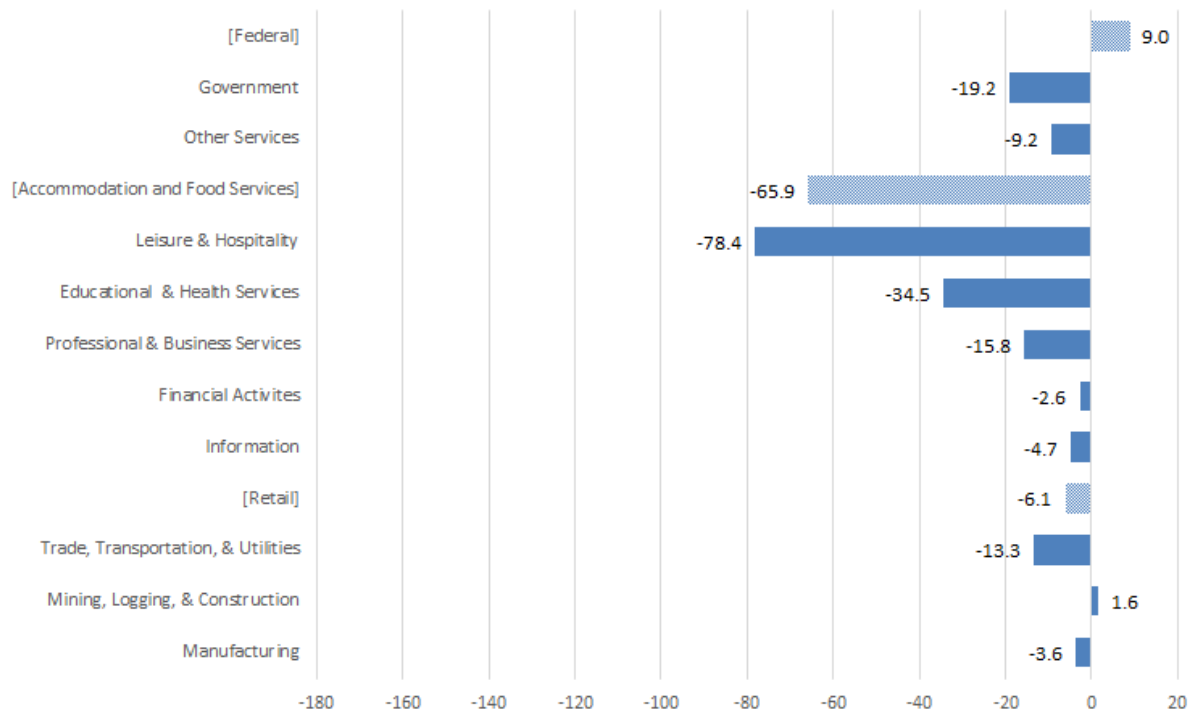
Unemployment Rate Washington MSA and US



Our unemployment rate nearly tripled with the onset of the pandemic but was still nearly 5 points below the nation. With reopening, the national and local rates did converge in October, but the November local rate did slip below the national rate.

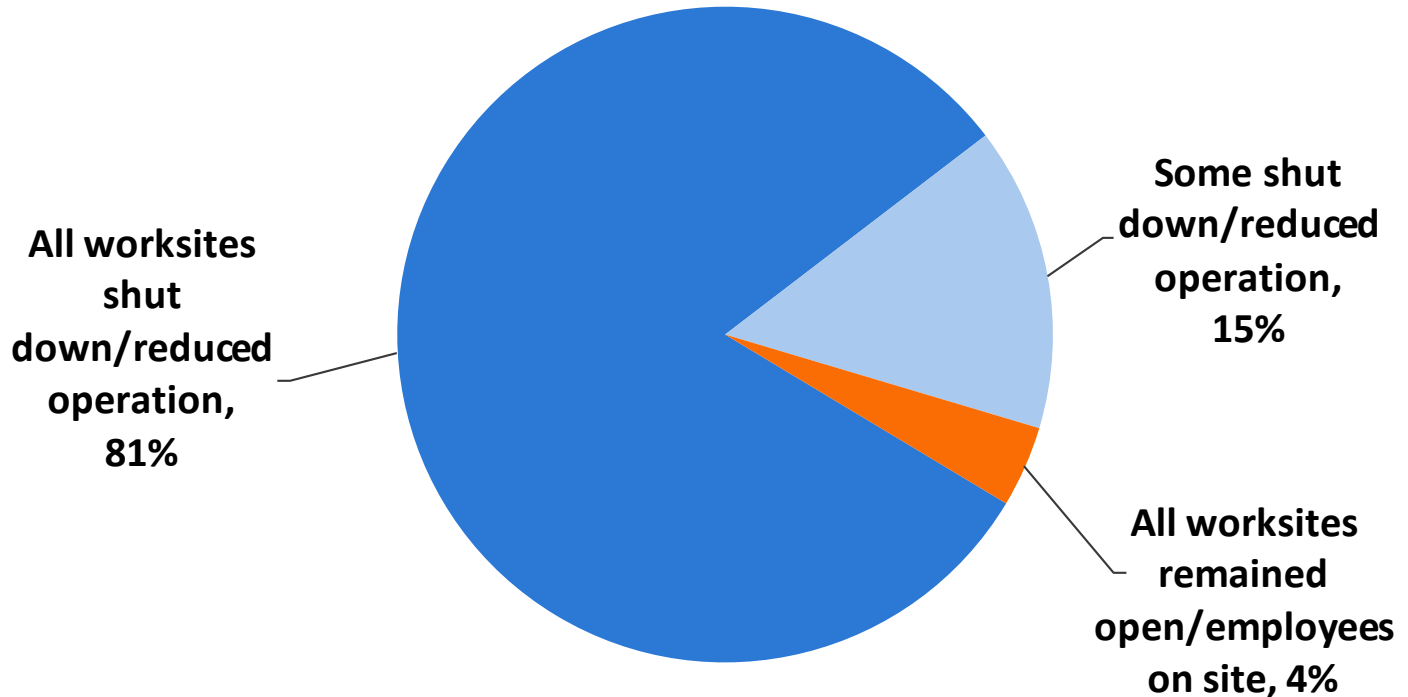


Over-the-year Job Change By Sector November 2020 vs November 2019 Washington MSA (Thousands)



The most-current employment data shows job losses to be in hospitality, retail, and several service industry sectors.

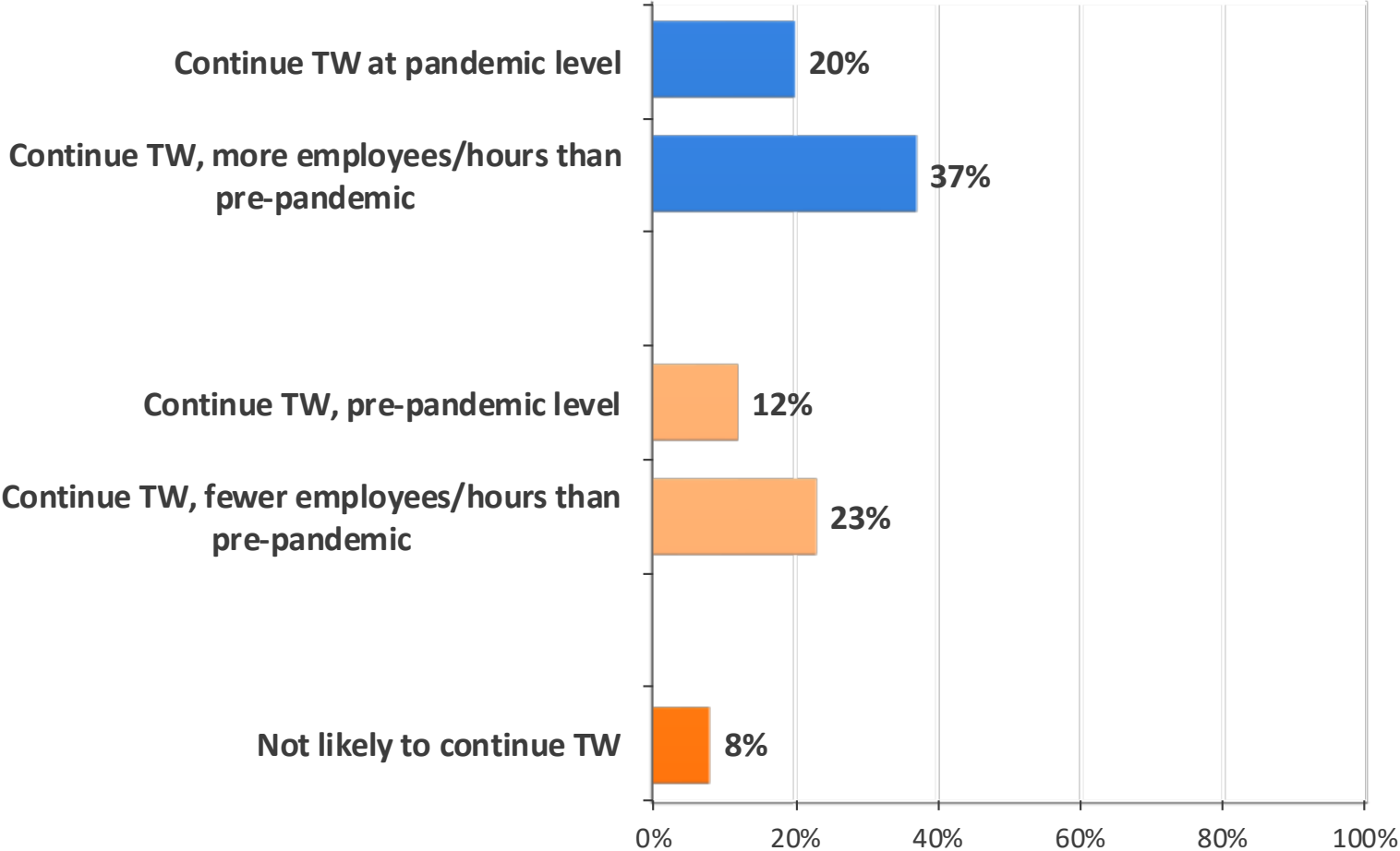
Worksite Operations



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

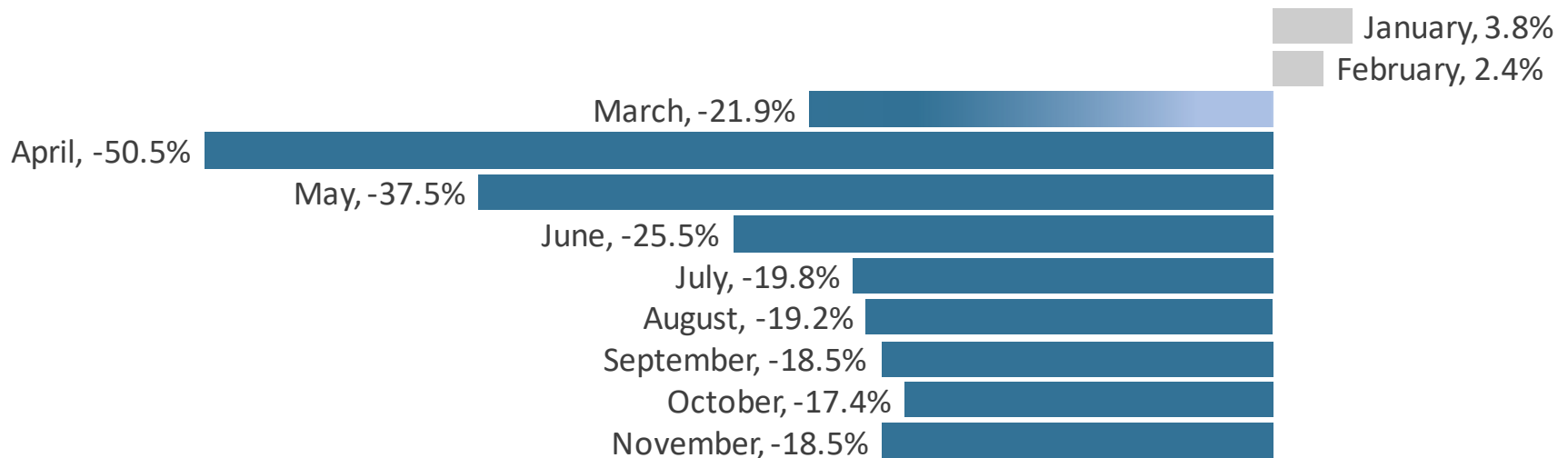
Anticipated Post-Pandemic Teleworking



Source: Commuter Connections 2020 Employer Telework Survey

Roadway Traffic Volumes: Region

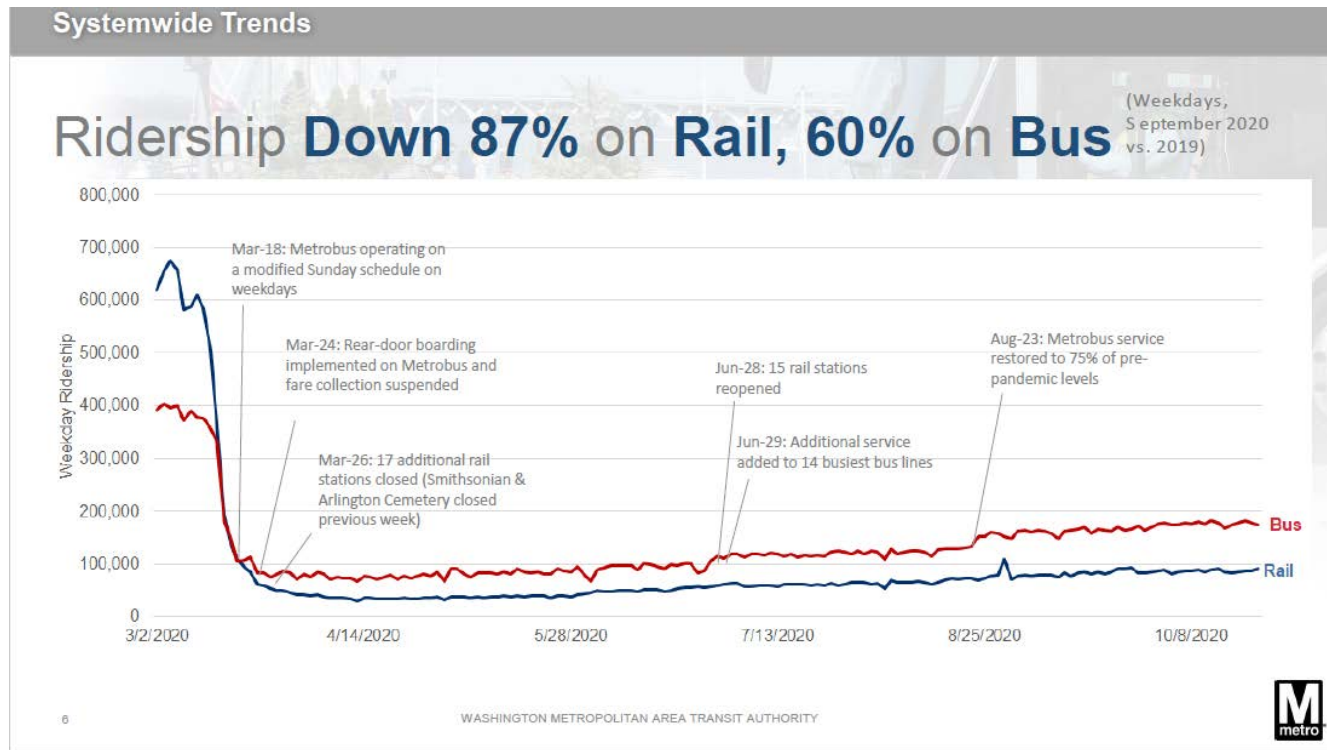
TPB Region - Monthly Average Percent Change from Equivalent 2019 Month



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. Volumes, however, decreased once again region-wide in November.

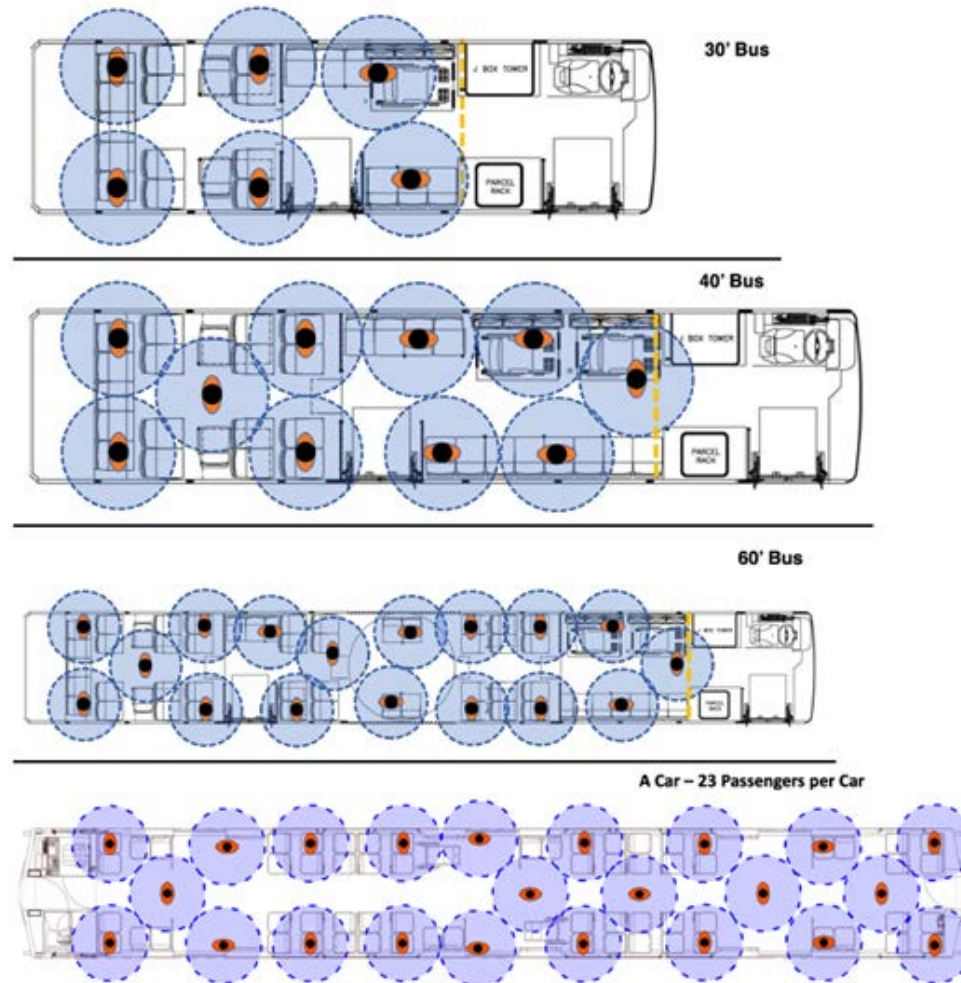
Metrorail and Metrobus Ridership



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

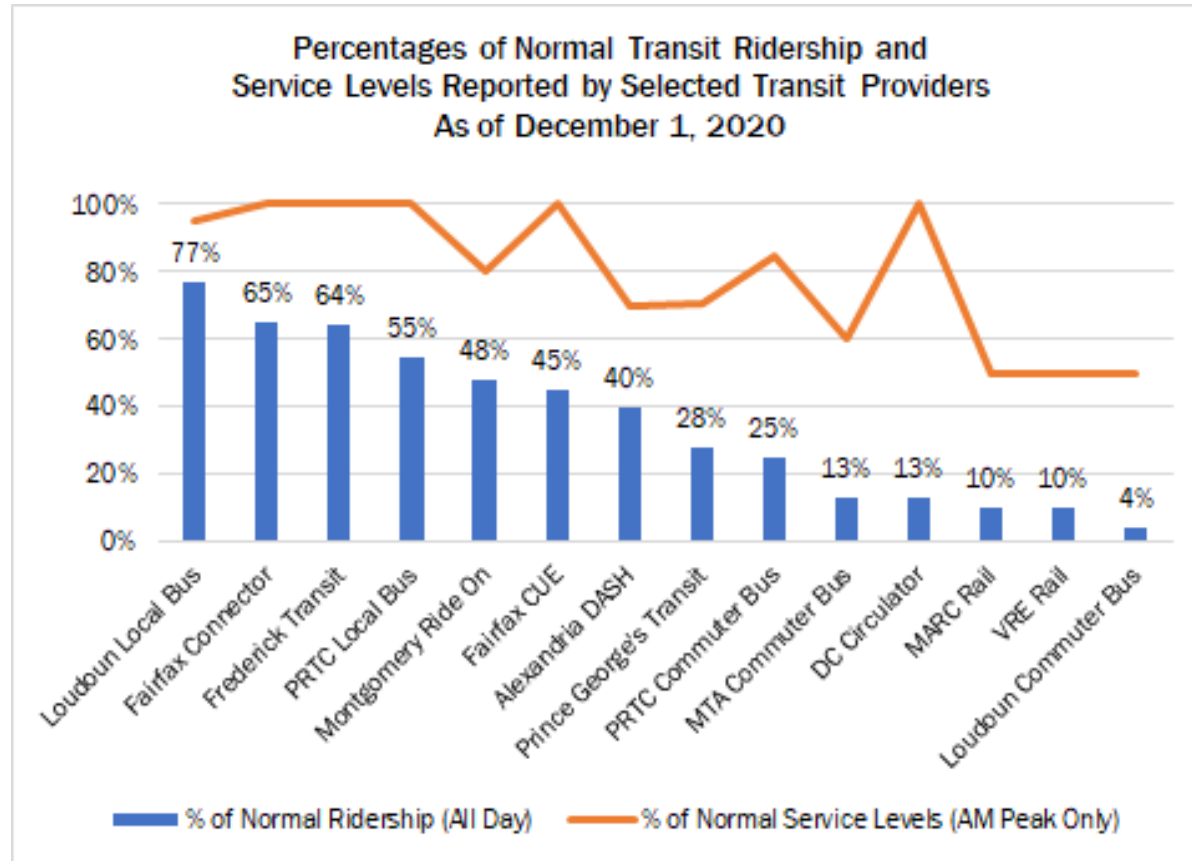
Ridership decreased as a result of both reduced demand and reduced transit capacity, underscoring the complex interrelationship of supply and demand on transit. This contrasts to roadway volume decreases, which resulted from demand reductions.

Effect of Capacity Limits on Ridership



- Implementing increased social distancing on transit vehicles reduced the maximum ridership, or capacity, that can be achieved.

Local and Commuter Transit

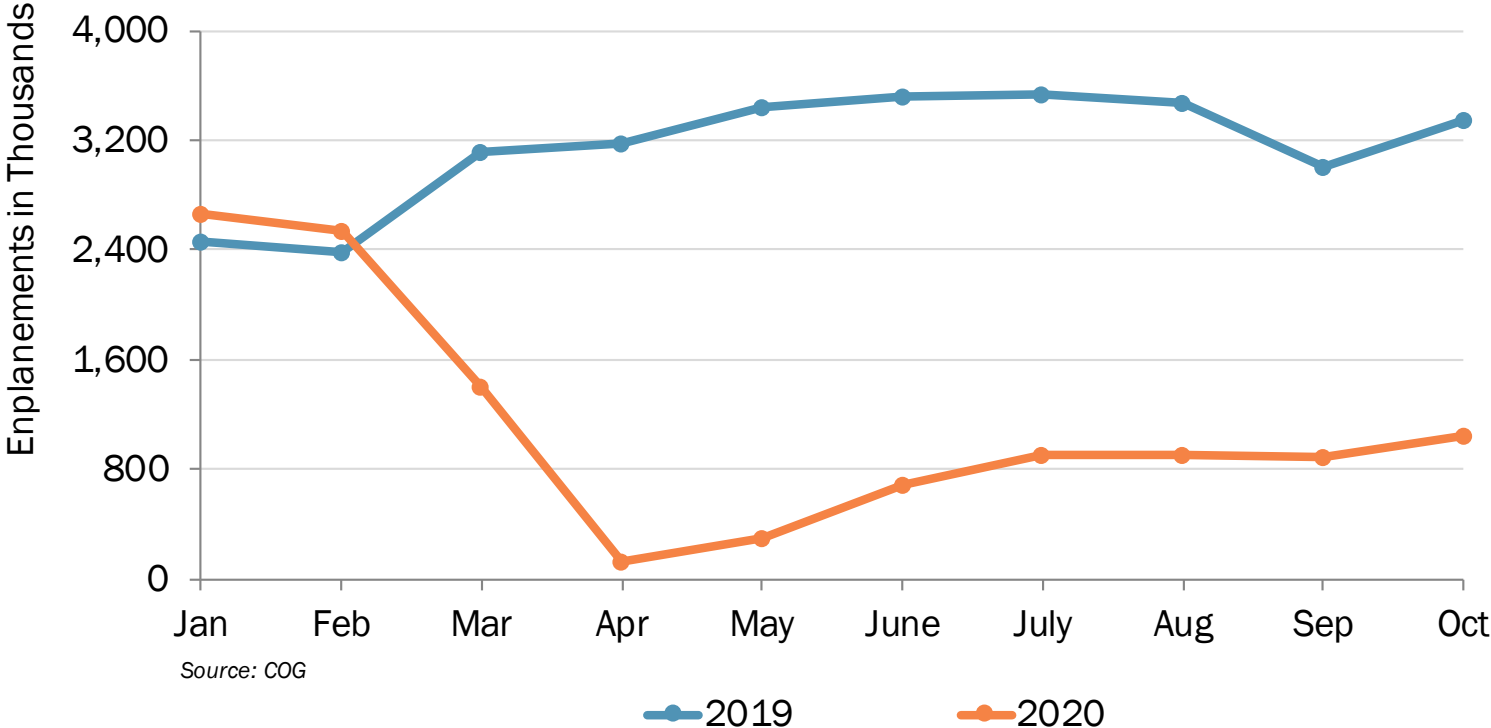


Impacts varied among long-distance, local, and tourist routes

Reported approximate percentages of ridership and service levels vs. typical levels. Source: COG/TPB questionnaire of local (non-WMATA) transit agencies, December 1, 2020. Disaggregated service levels for Loudoun County services were not available. Providers not shown did not participate in the questionnaire.

Air Travel

2019 and 2020 Monthly Enplanements at Washington/Baltimore Regional Airports



Air travel has recovered somewhat at the region’s three major airports since April but remains much lower than 2019.

Criteria Pollutants

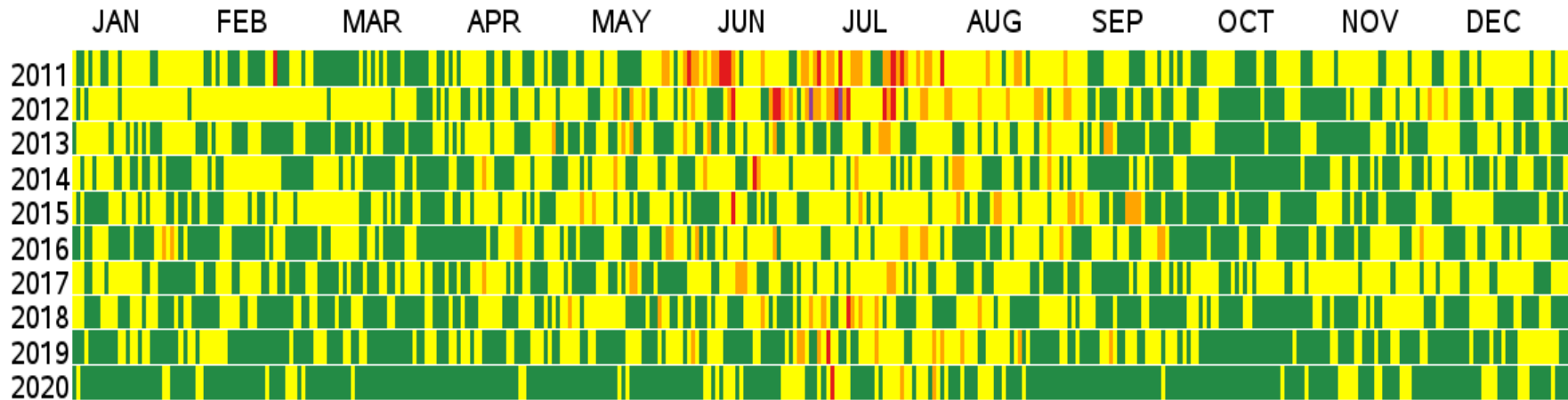
- **Ozone and fine particulate matter (PM2.5) were lower in 2020 compared to 2019.** (March 1 – September 30)
- COVID-19 related restrictions and closures reduced activities and related emissions.
- Weather was unfavorable to the formation and build up of pollutants.

Ozone Air Quality Index Days (March - September)			
Year	Code Green	Code Yellow	Code Orange
2020	180	32	2
2019	123	81	10

Note: Draft data valid as of December 10, 2020.

Criteria Pollutants

Daily AQI Values, 2011 to 2020 Washington-Arlington-Alexandria, DC-VA-MD-WV



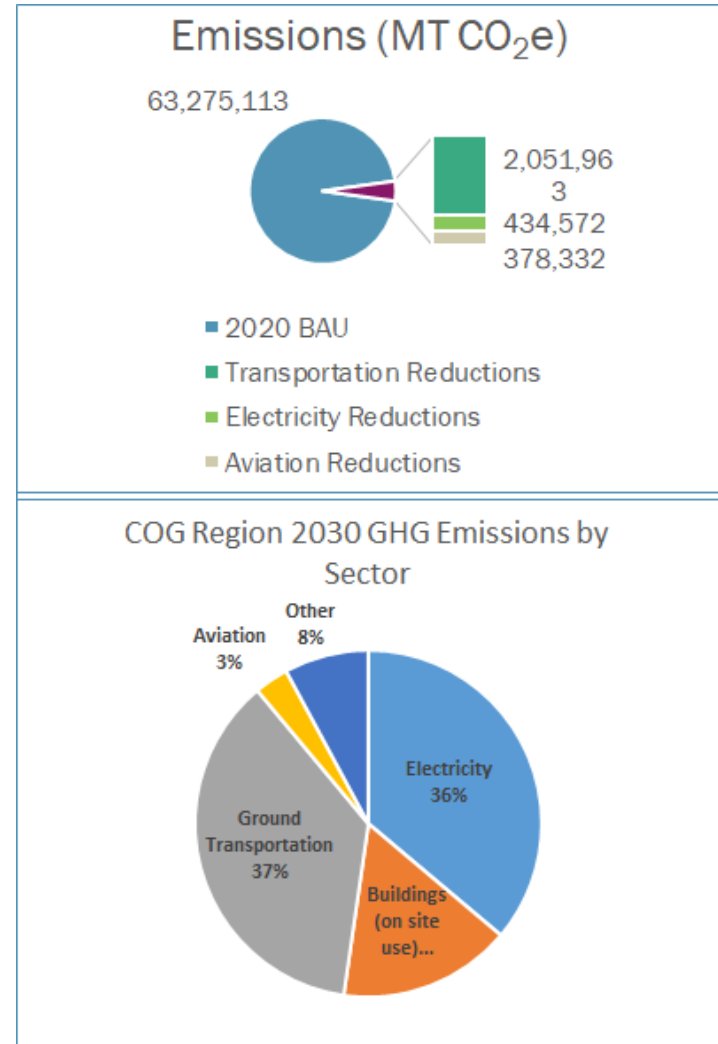
Source: U.S. EPA Air Data, generated January 5, 2021

Note: Data shown above is for combined AQI values for ozone, PM2.5, PM10, CO, NO2, and SO2 for the Washington-Arlington, Alexandria CBSA.

Impact on Greenhouse Gas Emission

- GHG Emission Reduction Estimates
 - Transportation: 40% average reduction of on-road sector (March 20 – June 26)
 - Electricity: 7.9% average reduction of electricity sector (March 20 – July 14)
 - Aviation: 65% average reduction of aviation sector (March 20 – July 20)

Note: COG BAU Projections revised May 2020



Next Steps

Staff from COG departments continue collaborating on the multisectoral assessment of COVID-19 impacts on the region.

- Deeper dive into more data
- Future presentations to be made (near-term and longer-term)
 - COG Board of Directors
 - Transportation Planning Board
 - Climate Energy and Environment Policy Committee
 - Metropolitan Washington Air Quality Committee
 - Chesapeake Bay and Water Resources Policy Committee
 - Human Services Policy Committee
 - Region Forward Coalition
 - Supporting Committees and Subcommittees

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Metropolitan Washington
Council of Governments

TRANSPORTATION IMPACTS OF THE COVID-19 PANDEMIC IN THE NATIONAL CAPITAL REGION

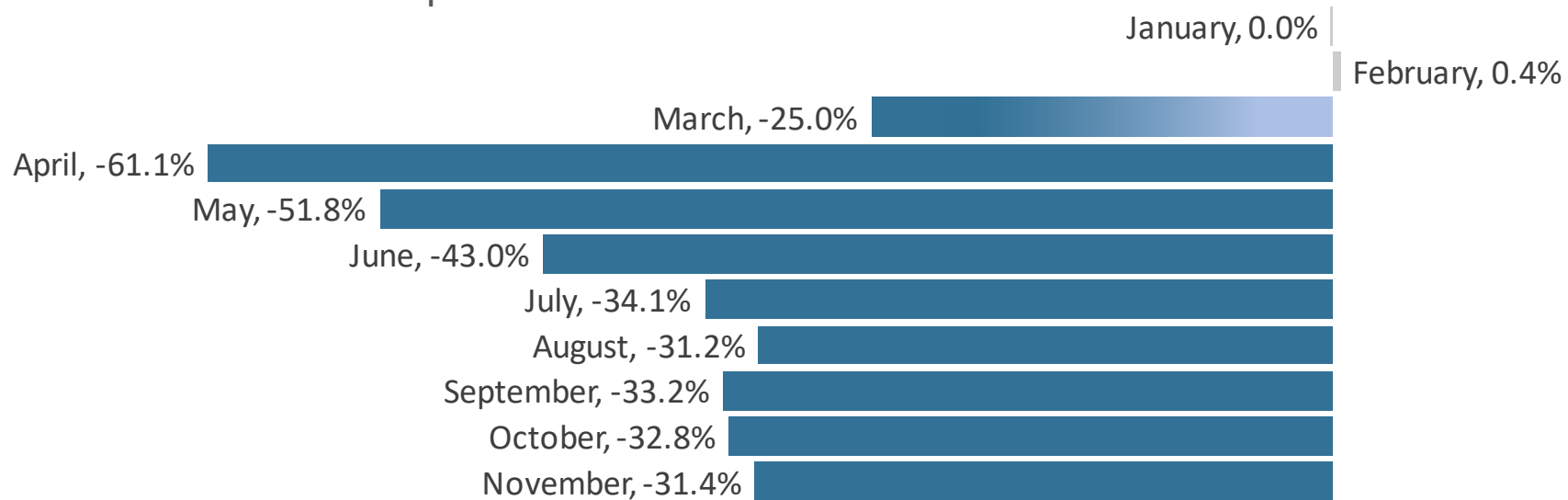
Additional Slides



Metropolitan Washington
Council of Governments

Roadway Traffic Volumes: Regional Core

Regional Core - Monthly Average Percent Change from Equivalent 2019 Month

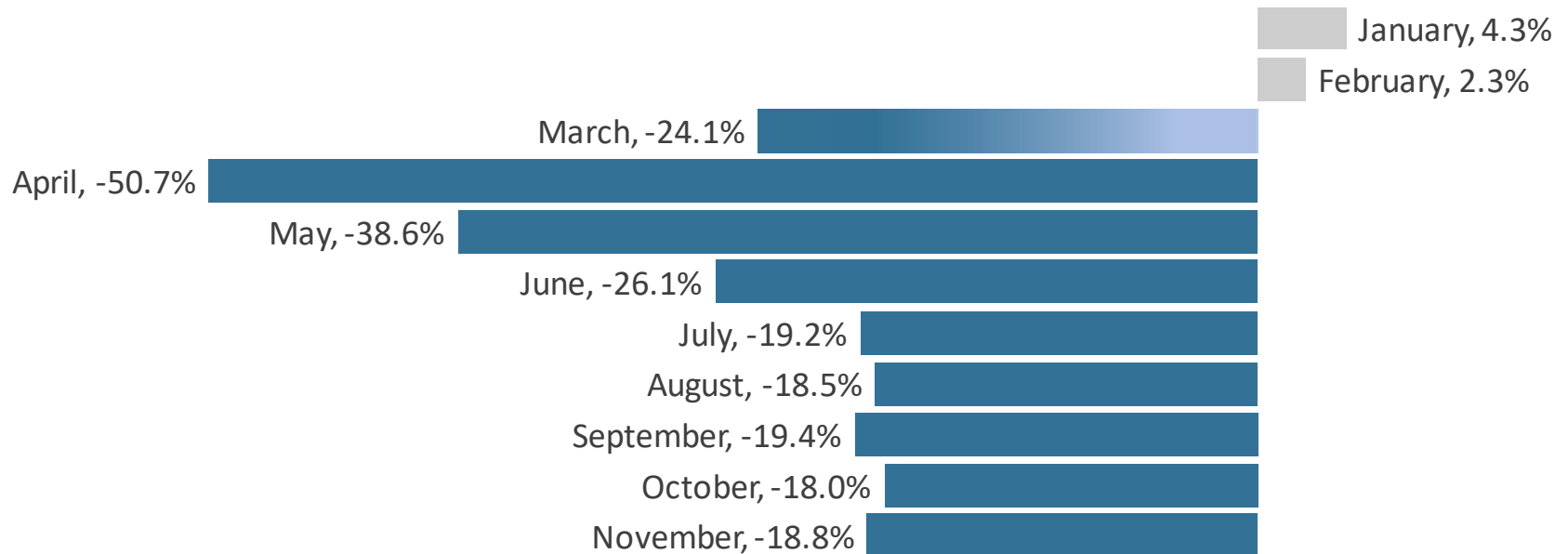


Source: COG/TPB

Traffic Volumes in the Regional Core decreased by more than 60% over the year in April and have recovered more slowly compared to the region overall.

Roadway Traffic Volumes: Inner Suburbs

Inner Ring - Monthly Average Percent Change from Equivalent 2019 Month

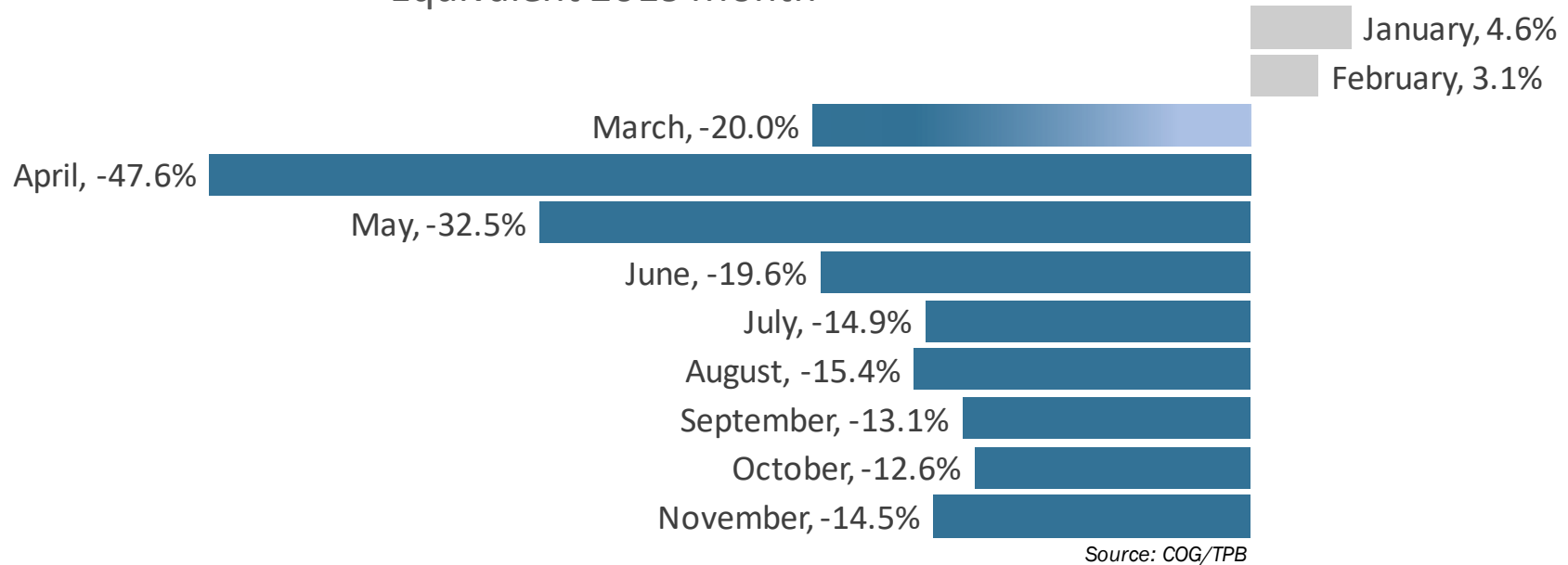


Source: COG/TPB

After decreasing by more than 50% in April, traffic volumes in the inner suburbs recovered to nearly 80% of 2019 levels, although fluctuations in recovery are still being observed, including a slight decrease in November.

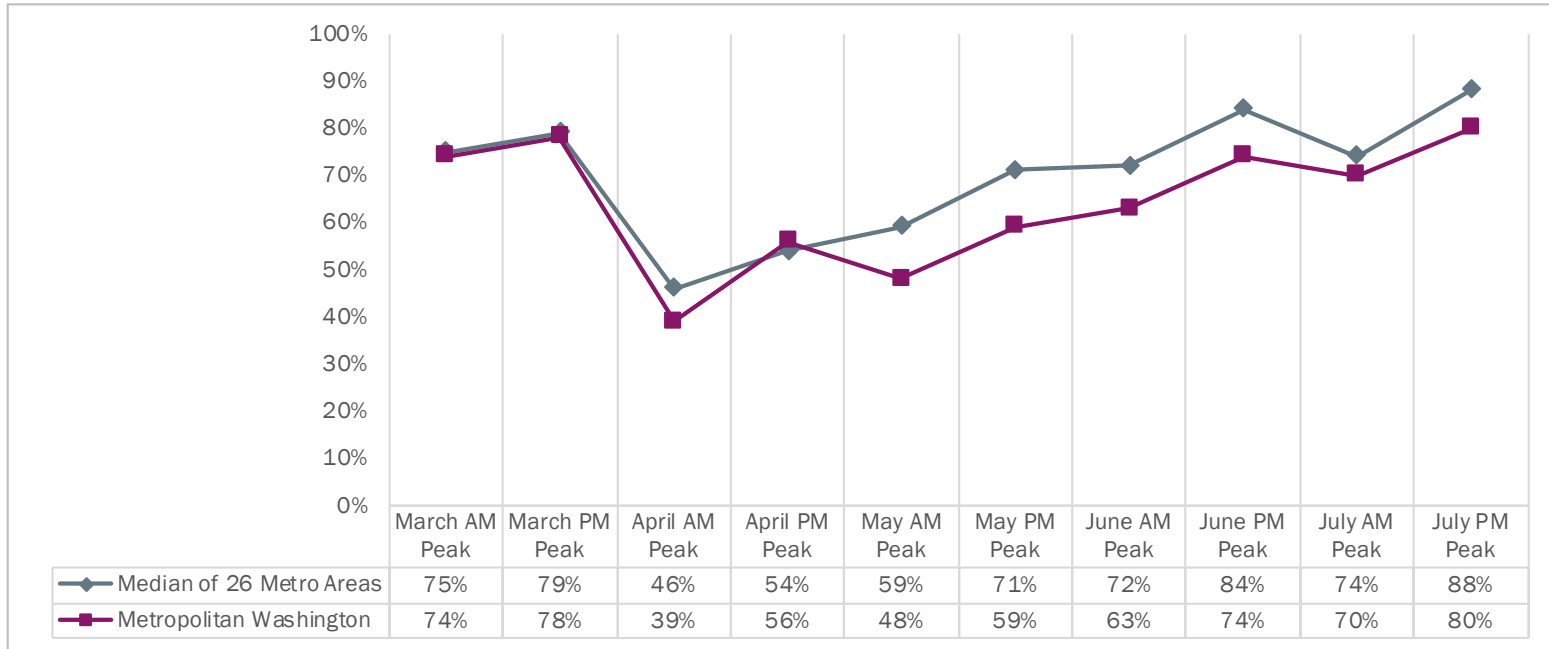
Roadway Traffic Volumes: Outer Ring

Outer Ring - Monthly Average Percent Change from Equivalent 2019 Month



In the outer ring within the TPB Modeled Area, traffic volumes sustained the smallest peak decrease in April of 47.6% and have since registered notable recovery. By October, volumes in the outer ring were down only 12.5% compared to the same time in 2019. However, volumes in the outer suburbs once again decreased in November by 2 percent.

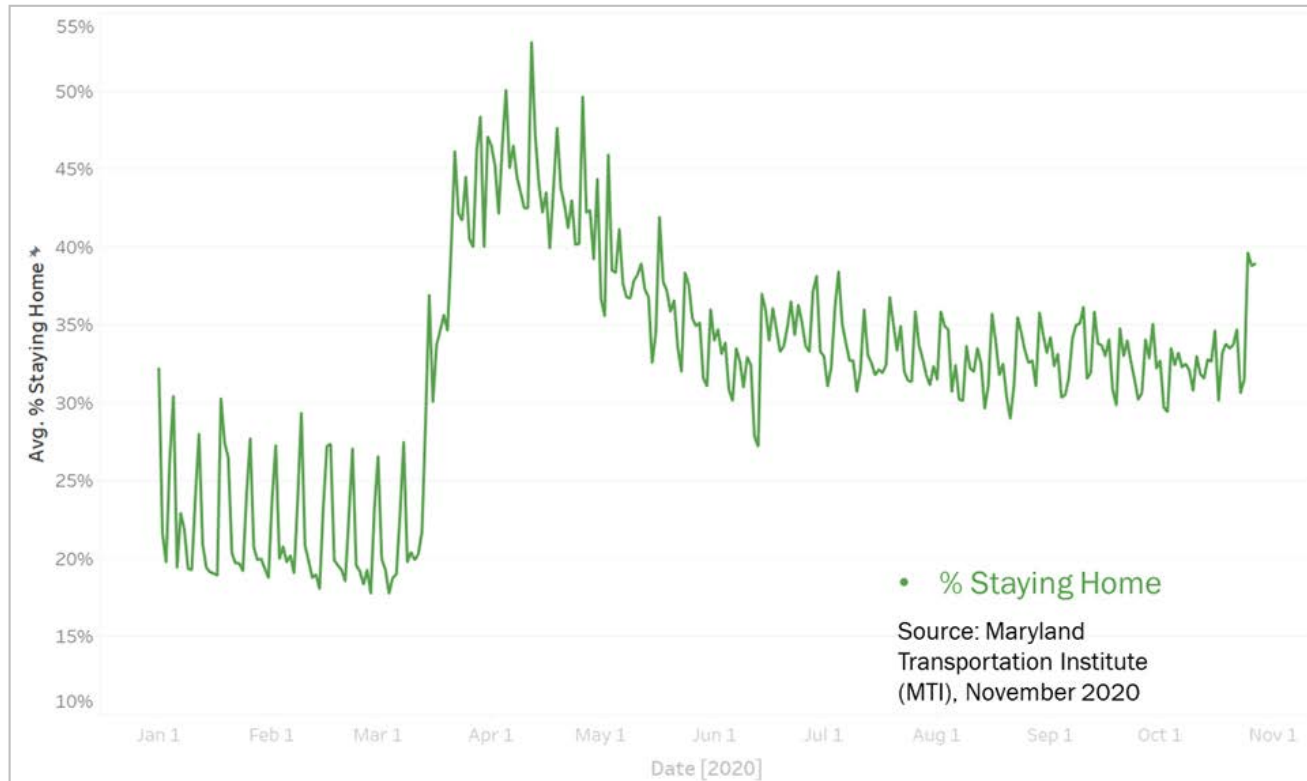
Vehicle Miles of Travel



Comparison to pre-pandemic levels. Source: INRIX

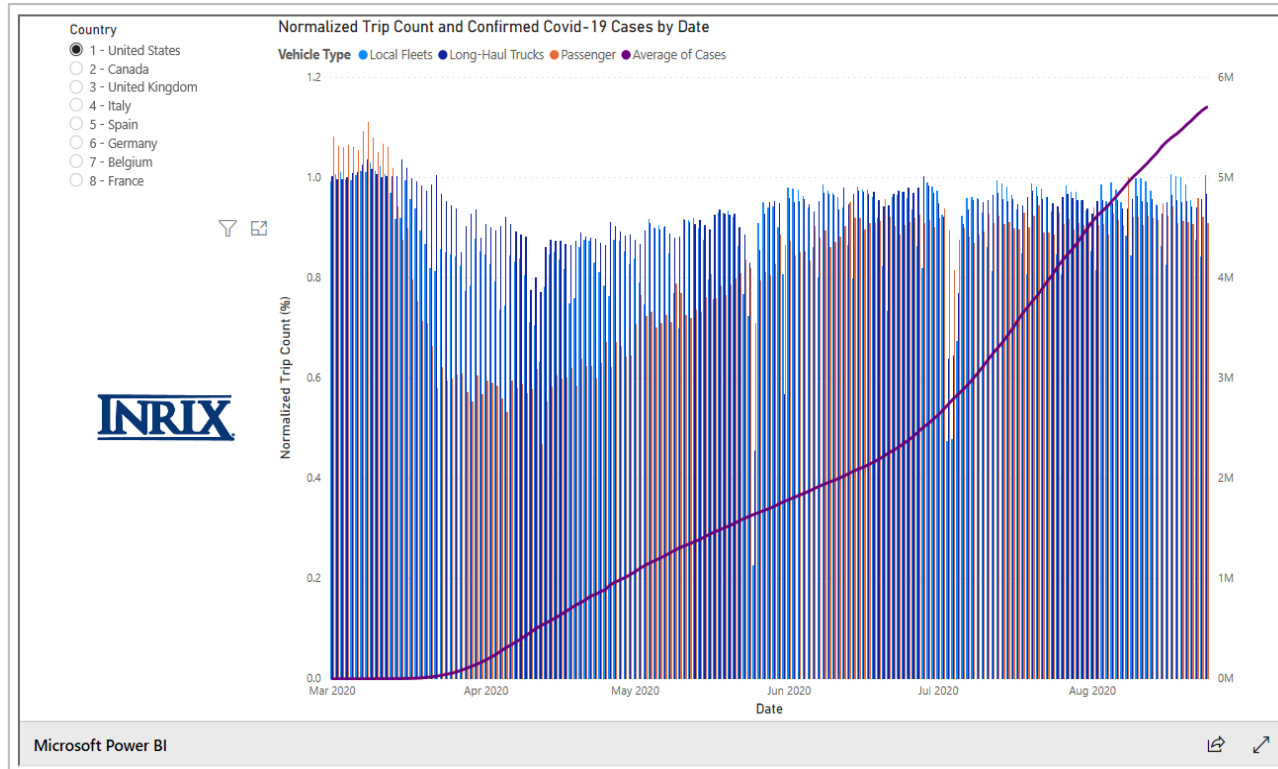
- Regional vehicle miles of travel (VMT) dipped most dramatically in April, but by July had recovered significantly
- Lower but similar to the median of 26 major metro areas

Person Travel



- Persons staying home on a given day regionally went from about 25% pre-pandemic, up to about 45%, and recently back to around 35%

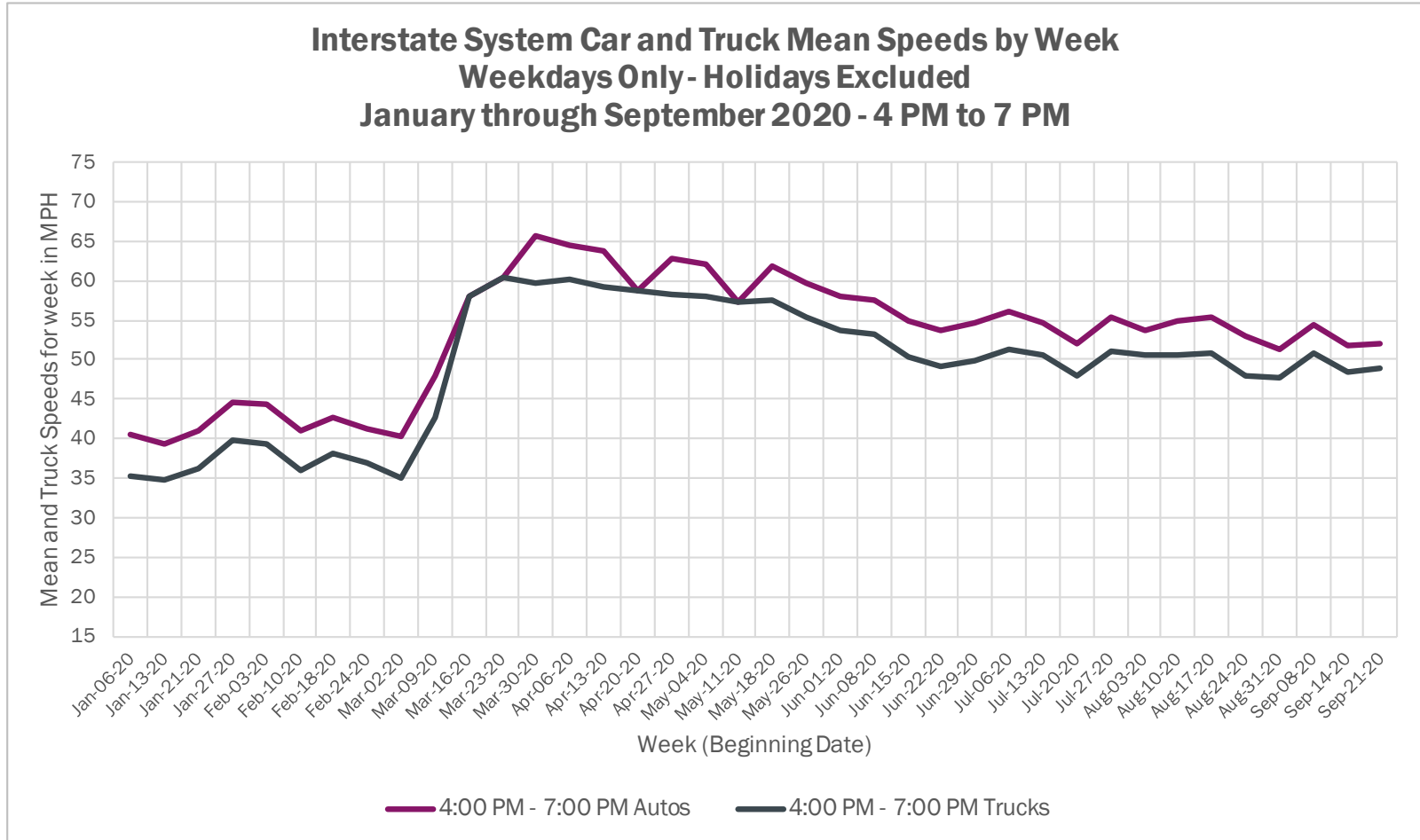
Truck Travel



Nationwide data. Source: INRIX.

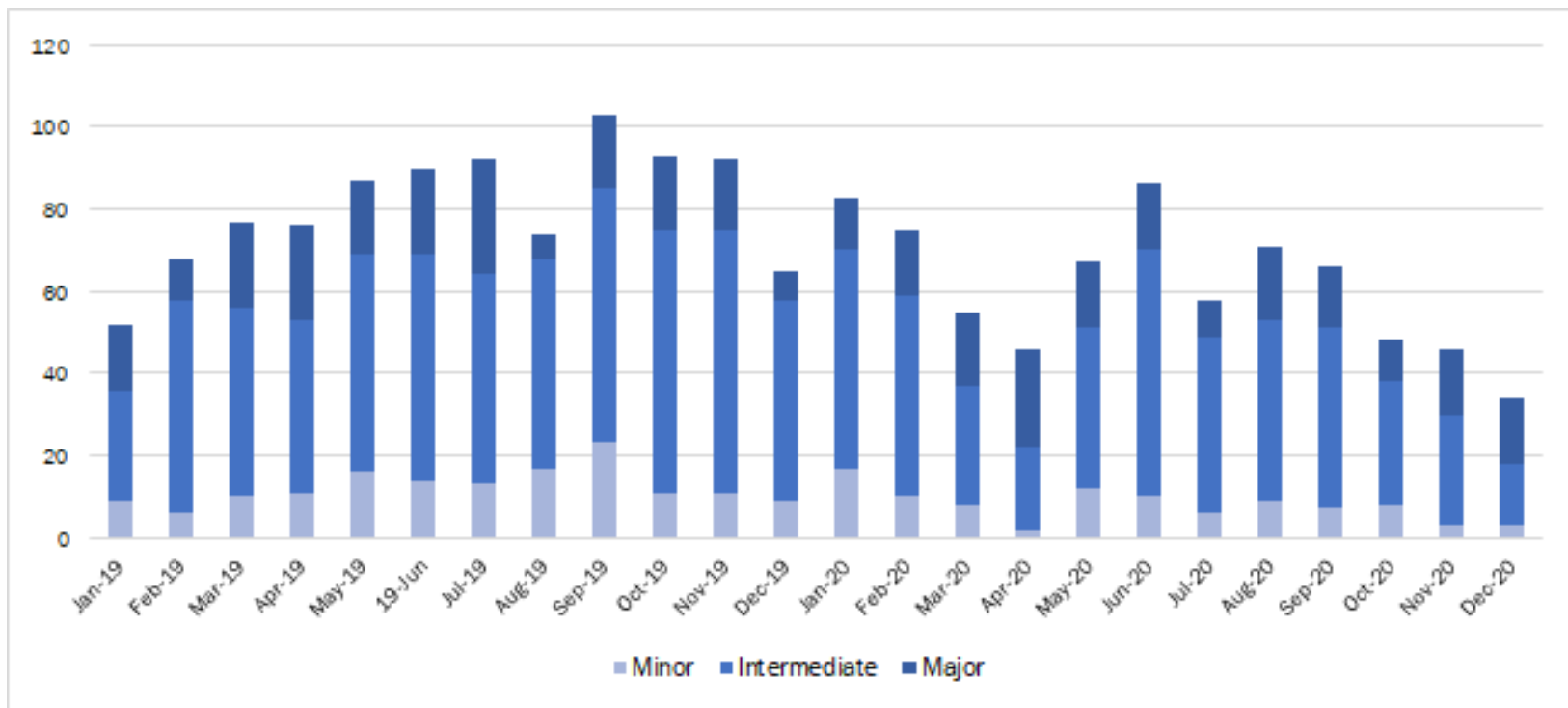
- Nationally and regionally, truck travel (blue) never declined as much as passenger travel (red/orange) did

Roadway Speeds



Source: COG/TPB Analysis of the National Performance Management Research Data Set (NPMRDS).
 Certain regional Interstate highway segments excluded due to data availability.

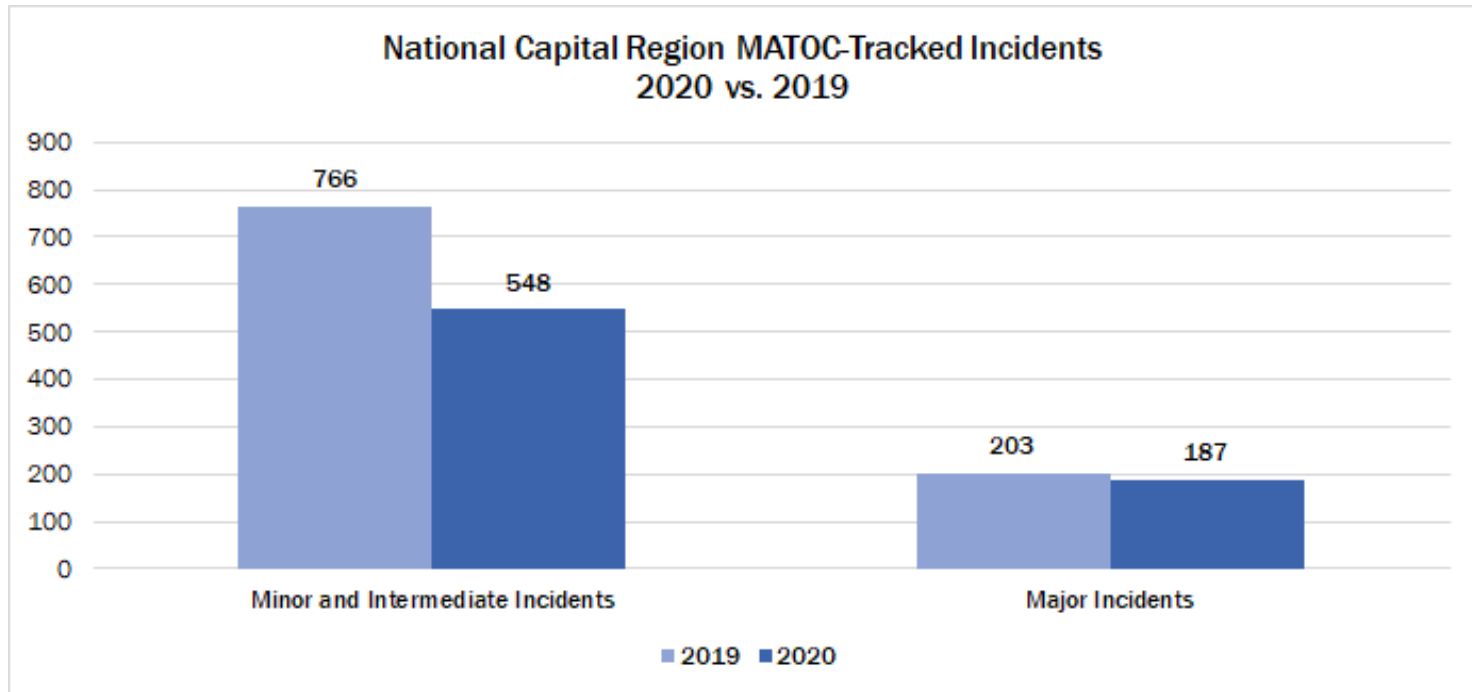
Safety: MATOC Incidents



Numbers of documented roadway incidents during Metropolitan Area Transportation Operations Coordination (MATOC) Program operating hours (4:30 A.M. to 8:00 P.M. weekdays only). Source: MATOC.

Overall MATOC-tracked incidents have trended lower since the pandemic, but major incidents have trended disproportionately high.

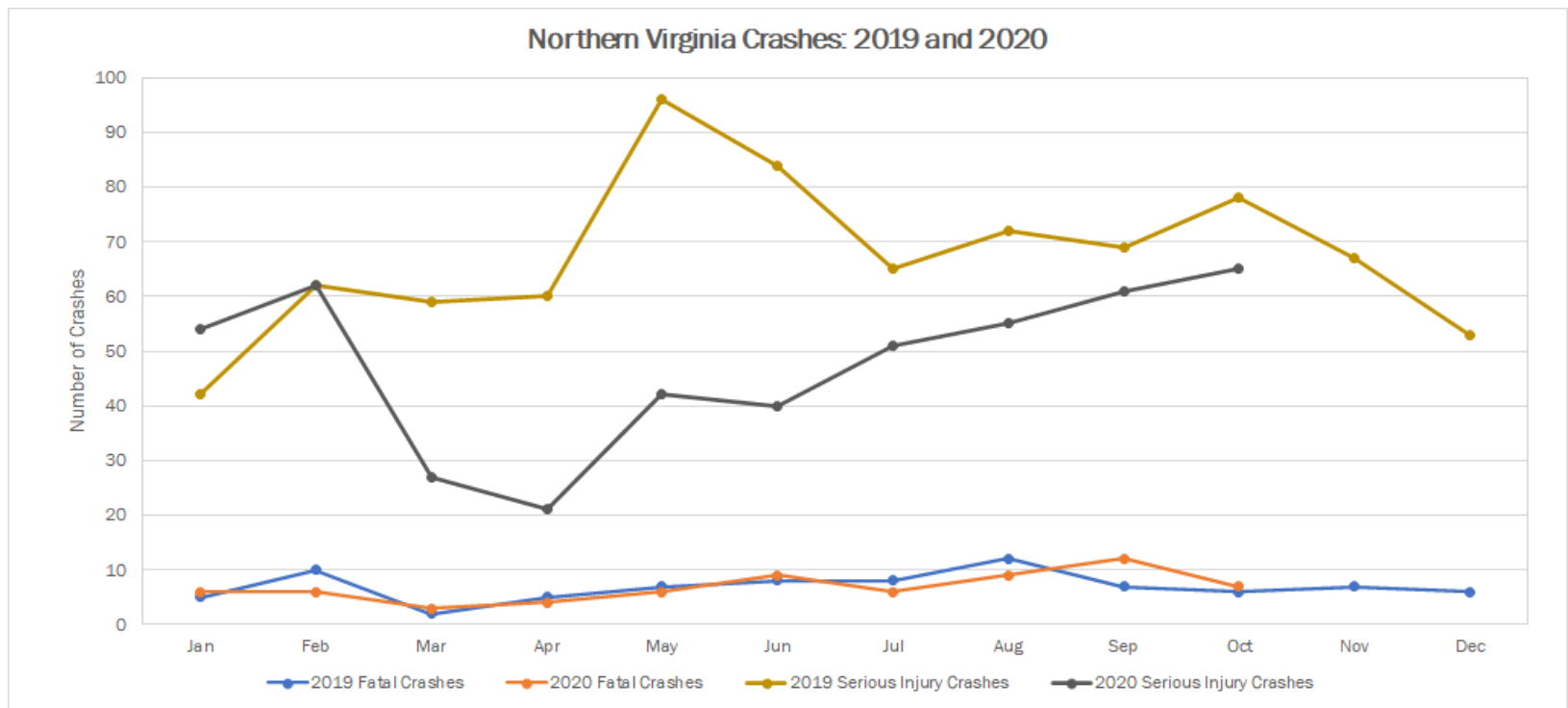
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Overall MATOC-tracked incidents have trended lower since the pandemic, but major incidents have trended disproportionately high (25.4% of all incidents in 2020 versus 20.9% in 2019).

Safety: Crashes (Northern Virginia)

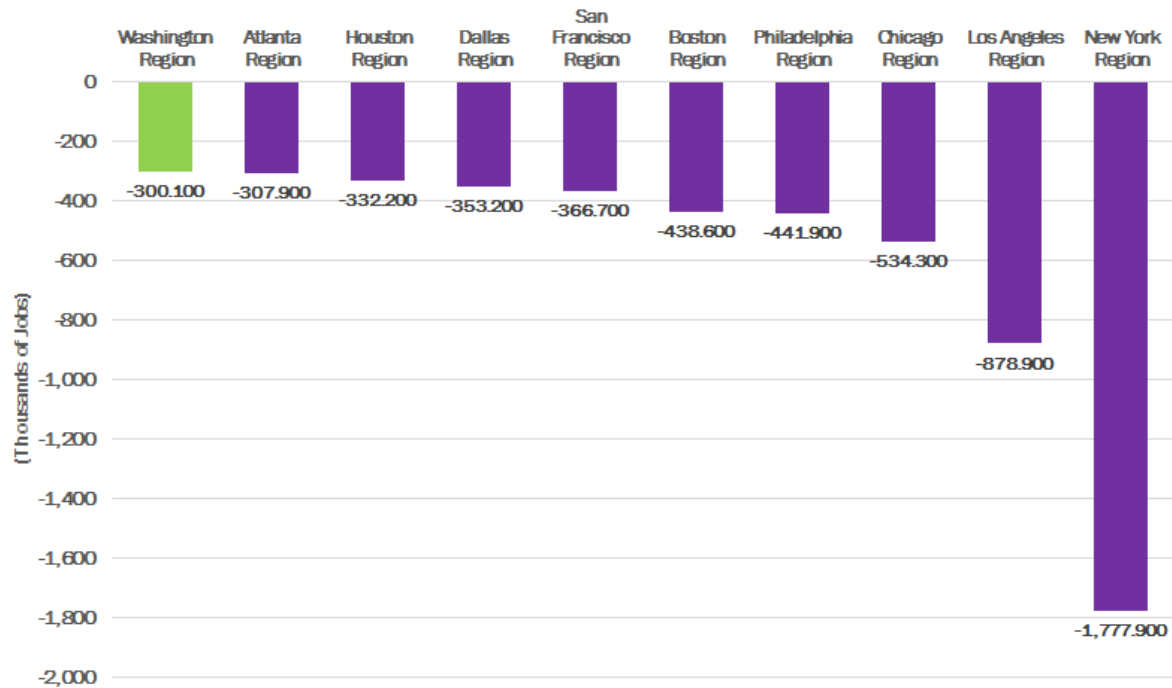


Data for 2020 are preliminary and subject to change. Source: VDOT.

Though serious crash numbers have been lower than 2019, fatal crashes have remained at about the same level as 2019, even with reduced traffic volumes since March

Non-Farm Job Loss March to April 2020 In 10 Largest MSAs

(Source: Bureau of Labor Statistics)

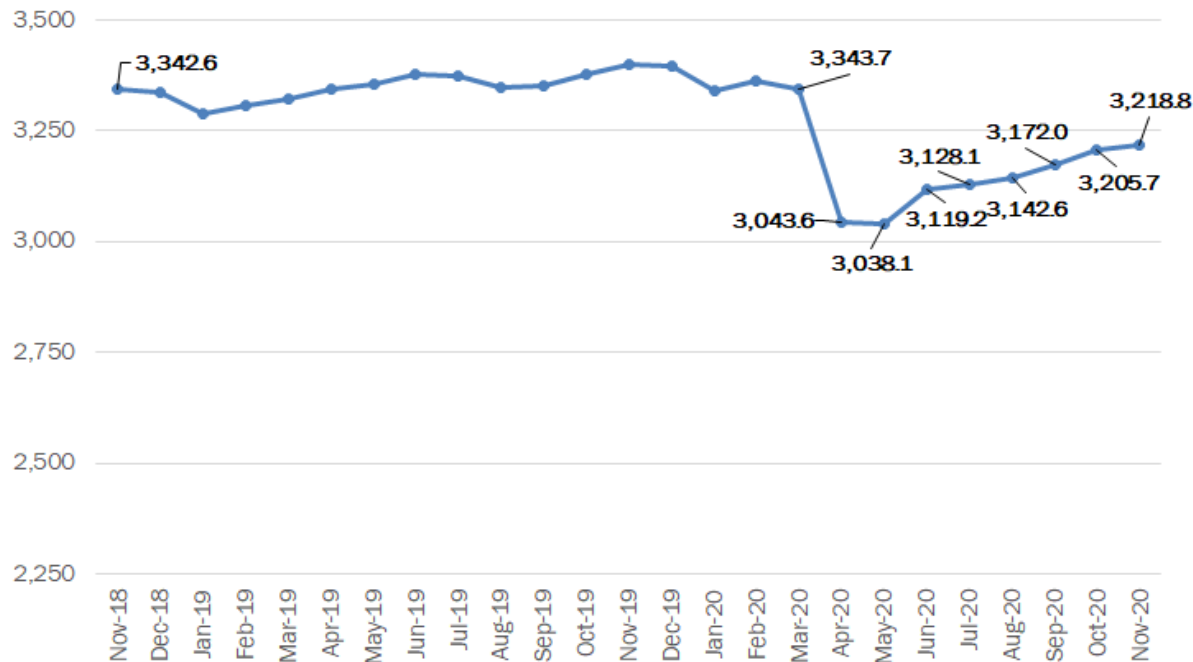


Our initial job losses were the lowest when compared to many of our peer regions. New York and Los Angeles experienced the most severe losses.

Non-Farm Jobs (000s) - Washington MSA

November 2018 to November 2020

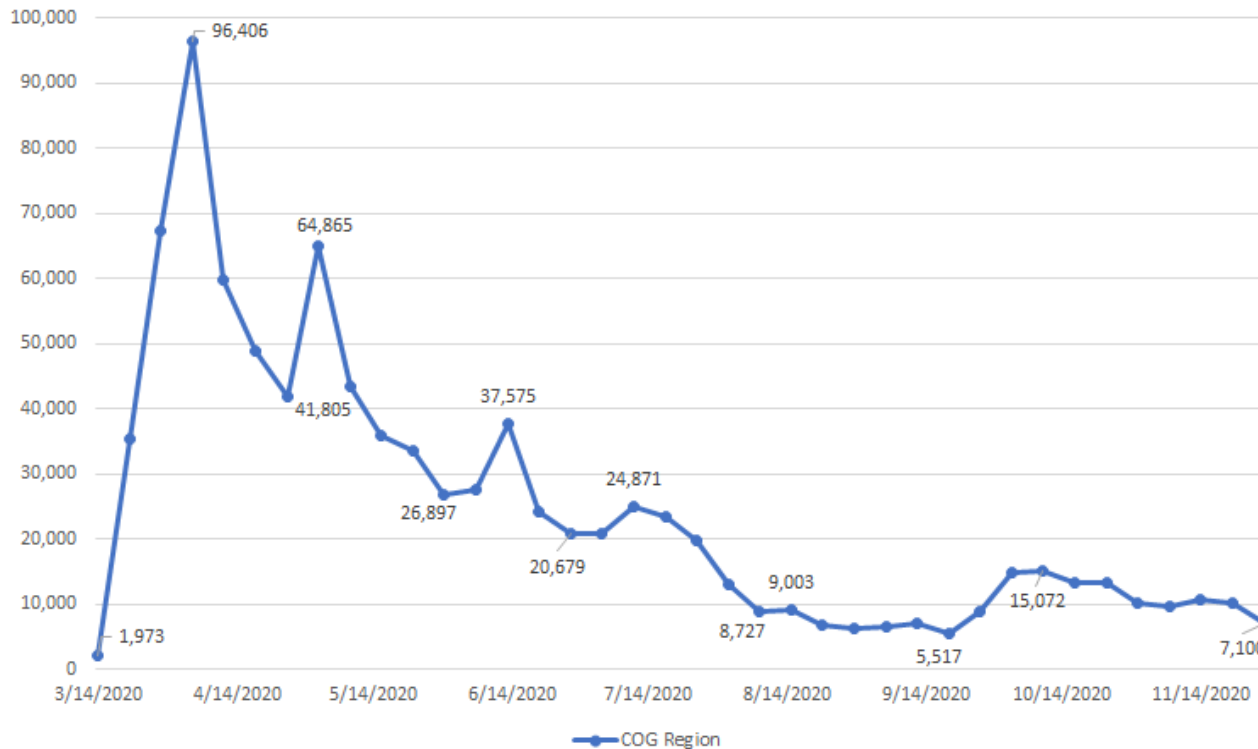
(Bureau of Labor Statistics, Not Seasonally-adjusted, Thousands)



The region lost 300,000 jobs between March and April of this year. As of November, 175,200 jobs have been added during our partial reopening

Unemployment Insurance Claims

(DC Department of Employment Services, Maryland Department of Labor, Licensing, and Regulation, and Virginia Employment Commission)

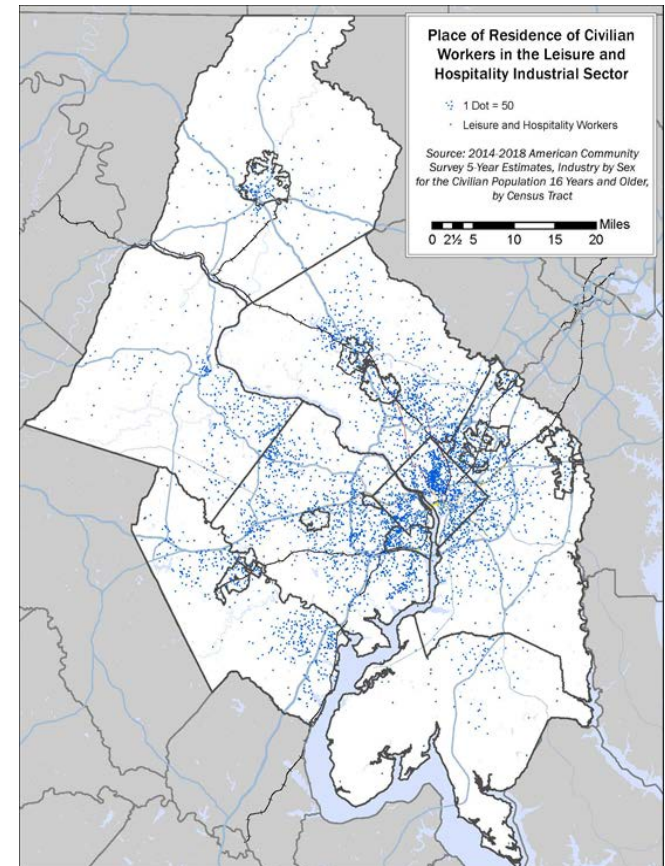


Weekly unemployment insurance claims peaked during April and have declined steadily as reflected in our improving unemployment rate

Place of Residence for Leisure and Hospitality Workers

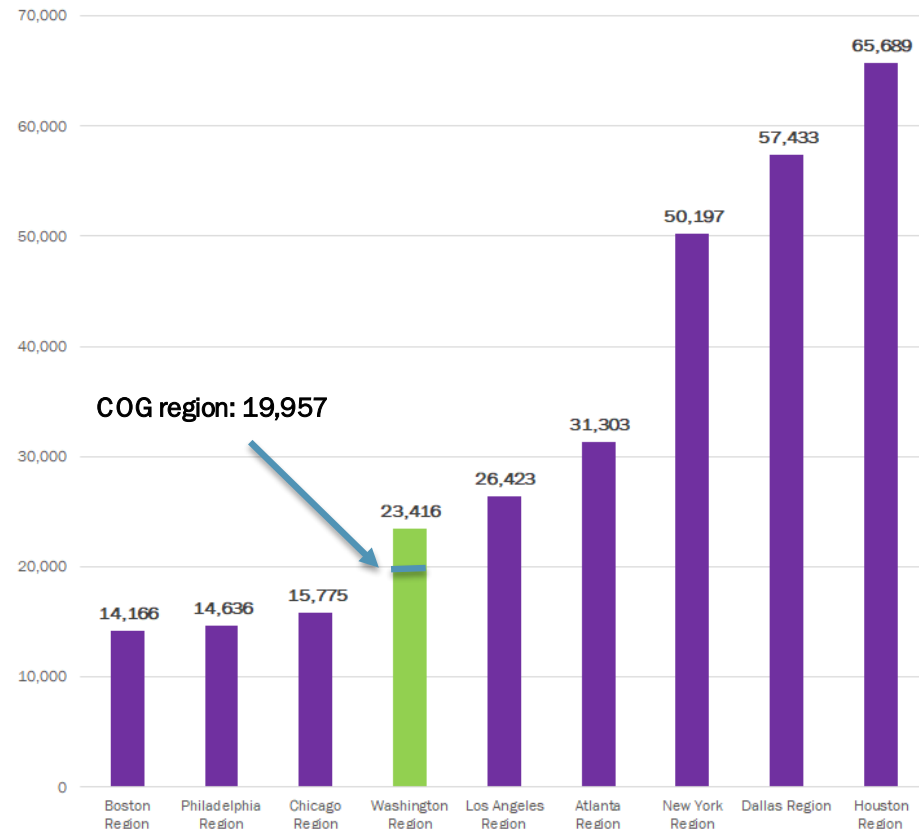
(Source: Census ACS)

- Leisure and Hospitality workers – the sector most vulnerable to layoffs – live throughout the region.
- Neighborhoods with the highest concentrations of leisure and hospitality workers include east of Rock Creek Park in the District of Columbia, western Alexandria, South Arlington, Herndon and Annandale in Fairfax County, along US 1 in Fairfax and Prince William Counties, and Wheaton and Twinbrook in Montgomery County.



New Housing Units Authorized Issued in 10 Largest MSAs December 2019 to November 2020

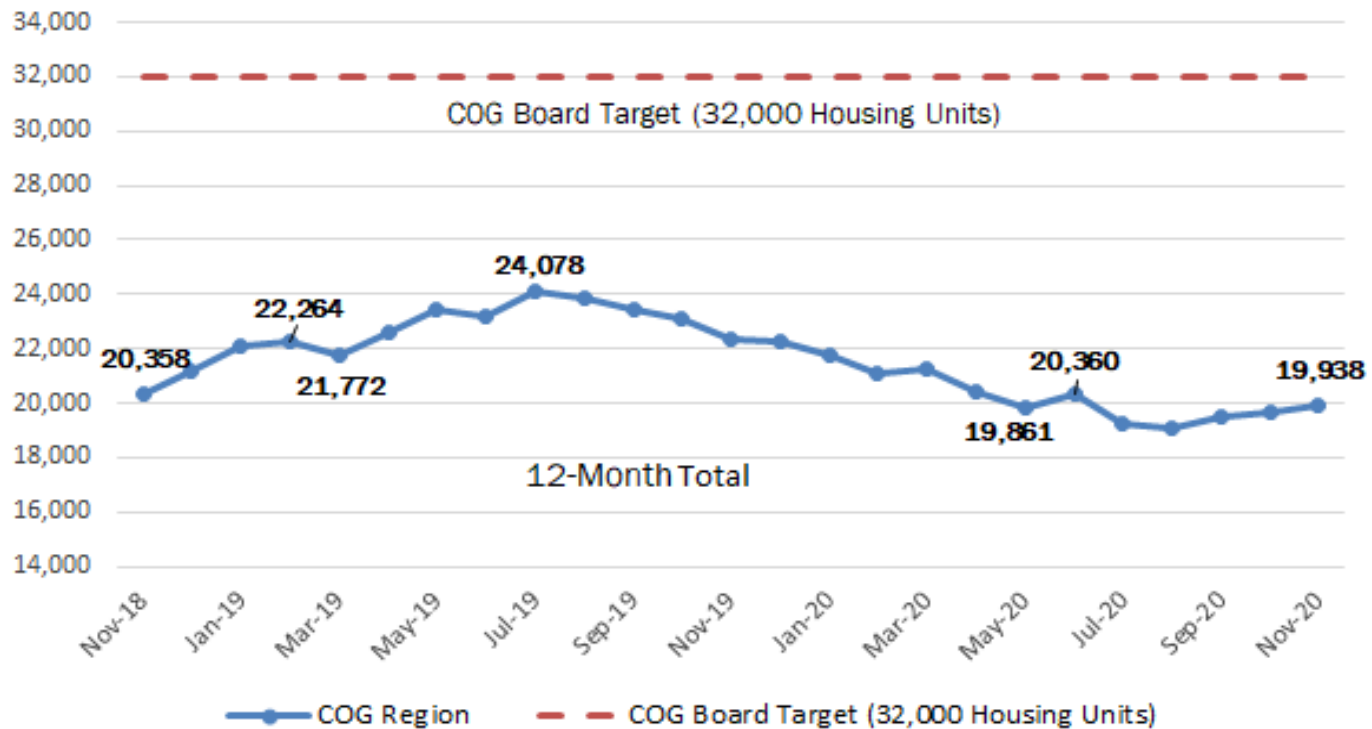
(Source: Census Bureau)



Our region lags behind several large peer MSAs in current permitting activity, most notably Houston, Dallas and New York.

New Housing Units Authorized 12-month total for COG Region

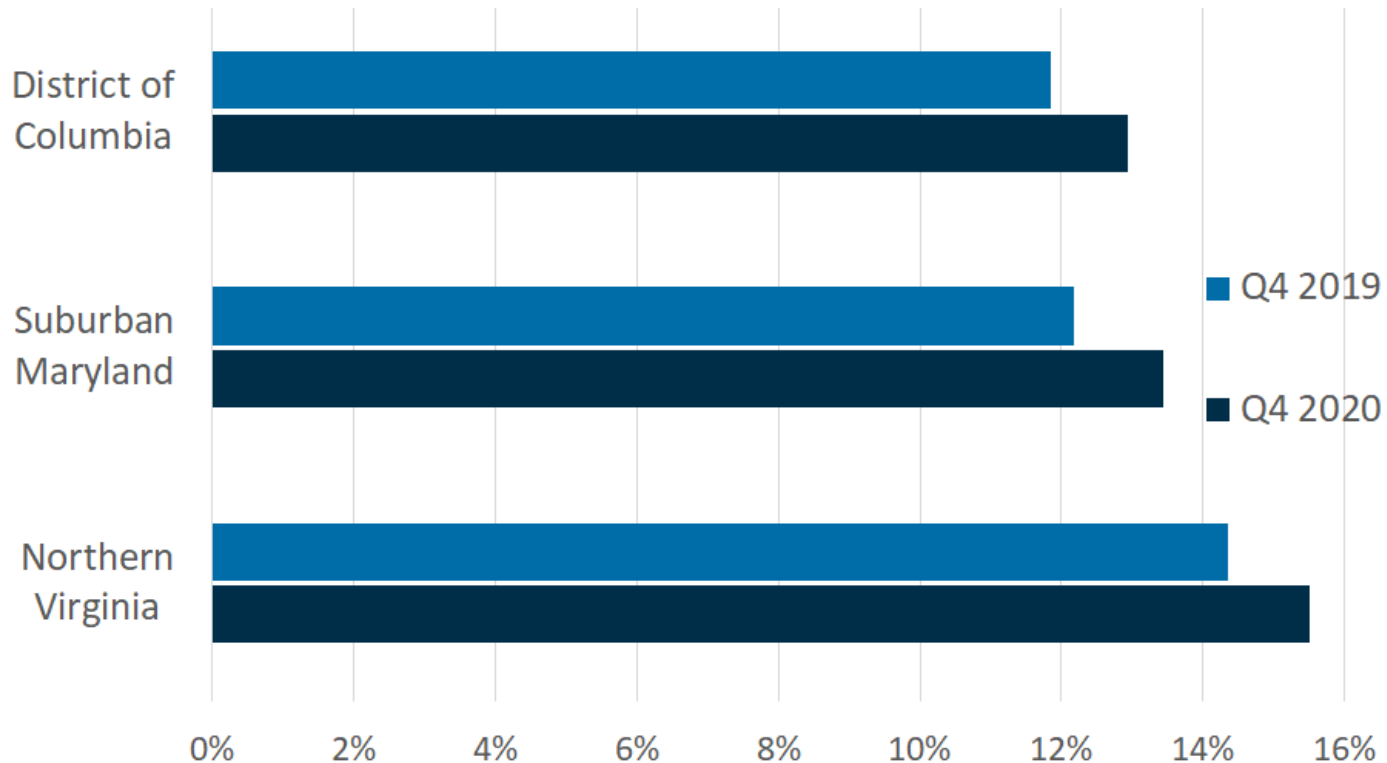
(Source: US Census C-40 data)



The number of new housing permits has declined monthly since July 2019 and is far below the adopted COG target.

Change in Office Vacancy Rates Q4 2019 vs Q4 2020

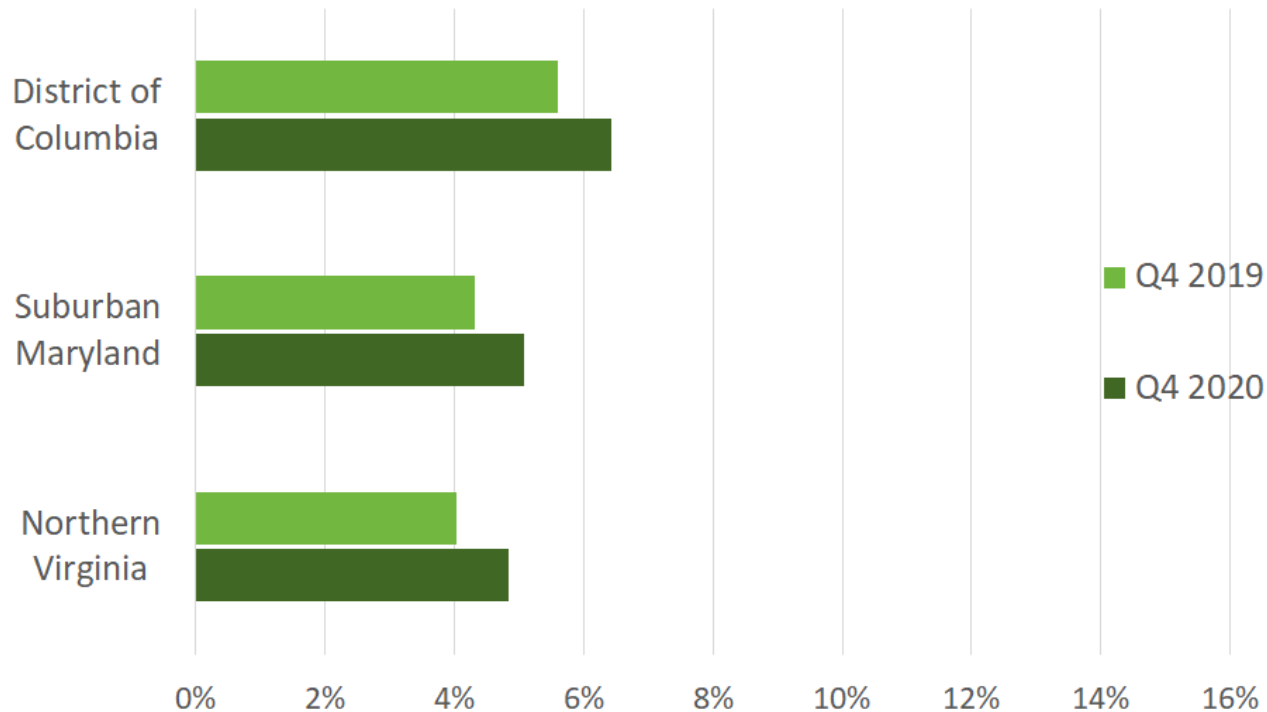
(Source: CoStar)



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

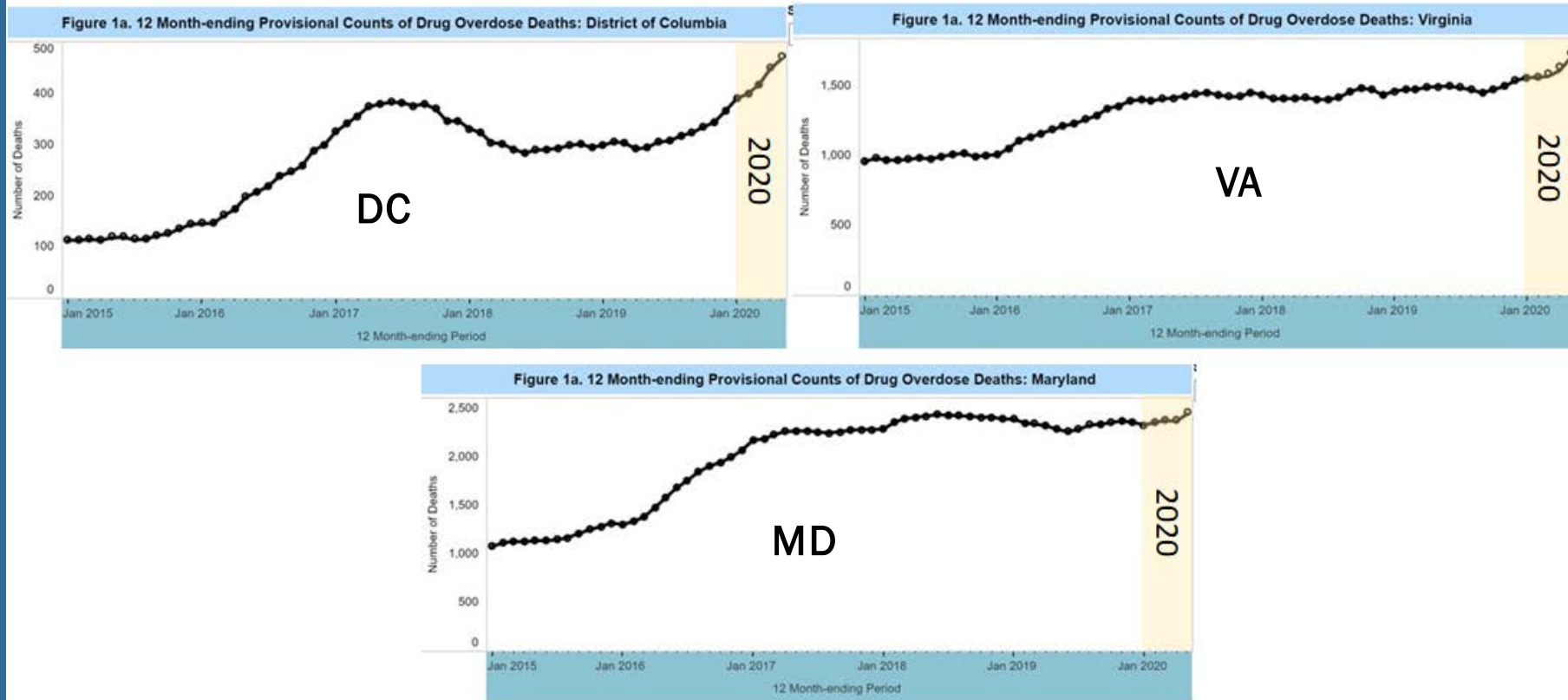
Change in Retail Vacancy Rates Q4 2019 vs Q4 2020

(Source: CoStar)



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

Drug Overdose Deaths



CDC National Center for Health Statistics
<https://www.cdc.gov/nchs/nvss/vsrr/drug-overdose-data.htm>

Current overdose death counts are available from January 2015 - April 2020. Early in the pandemic, overdose deaths were trending upward across the DMV.