

# REGIONAL TRANSPORTATION FOR A NEW NORMAL

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## Establishing a Baseline Understanding

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Planning Directors Technical Advisory Committee  
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# 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. 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**



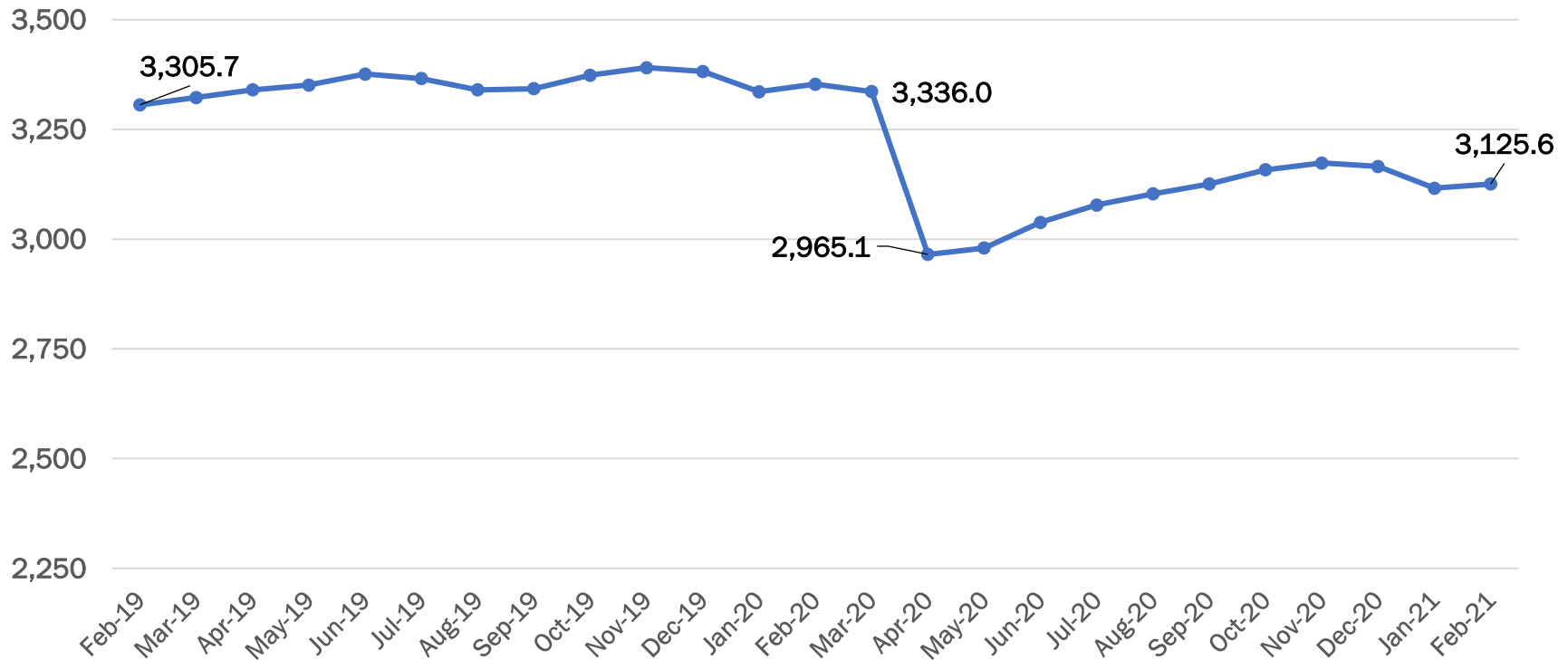
New York Times Cases & Deaths Tracker: <https://www.nytimes.com/interactive/2020/us/covid-cases-deaths-tracker.html#USA-MSA47900>. The Times uses reports from state, county and regional health departments.

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

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

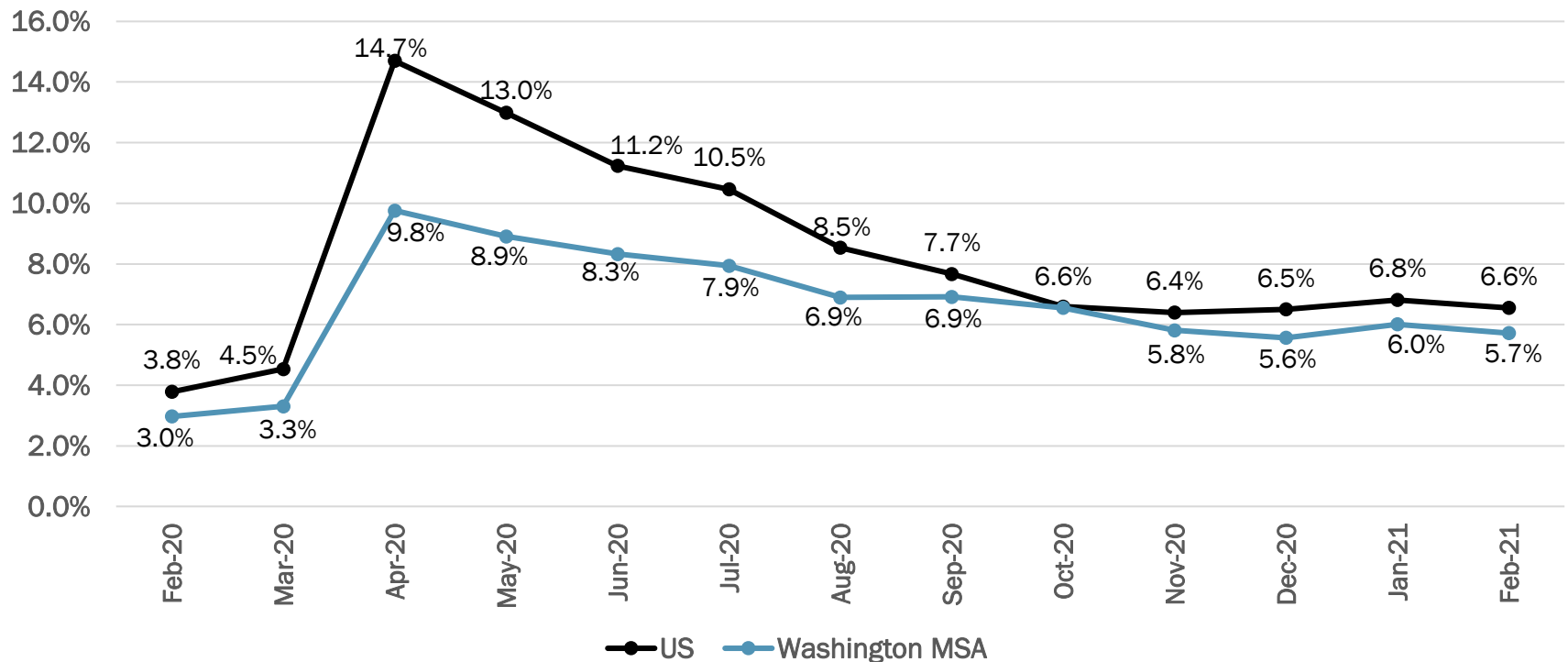
February 2019 to February 2021

(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.

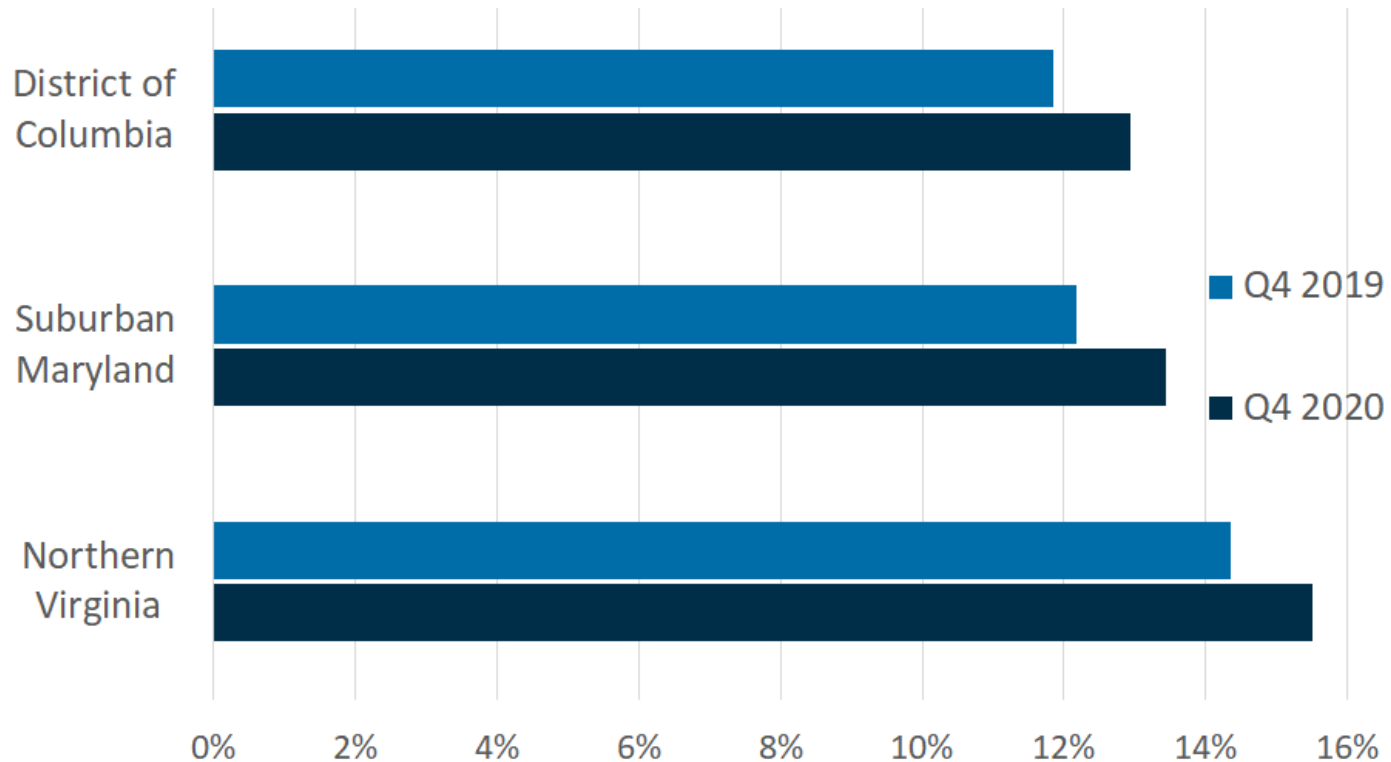
# Unemployment Rate Washington MSA and US



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

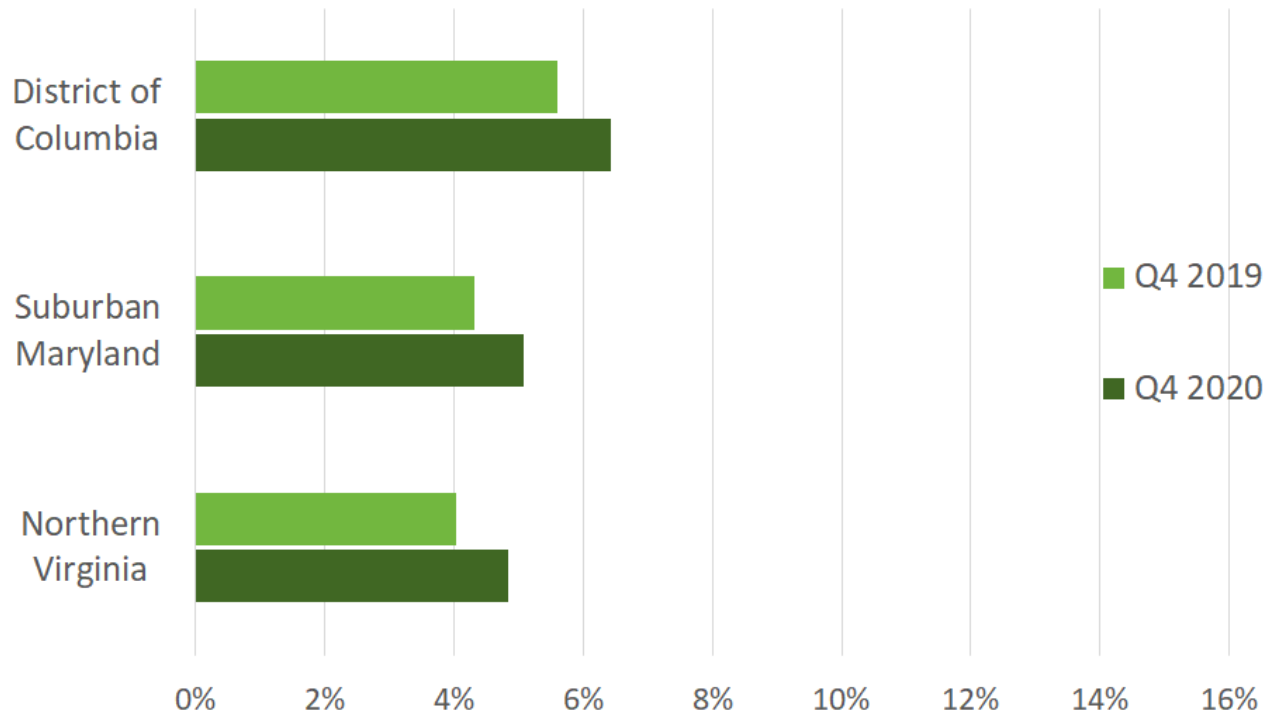
(Source: CoStar)



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

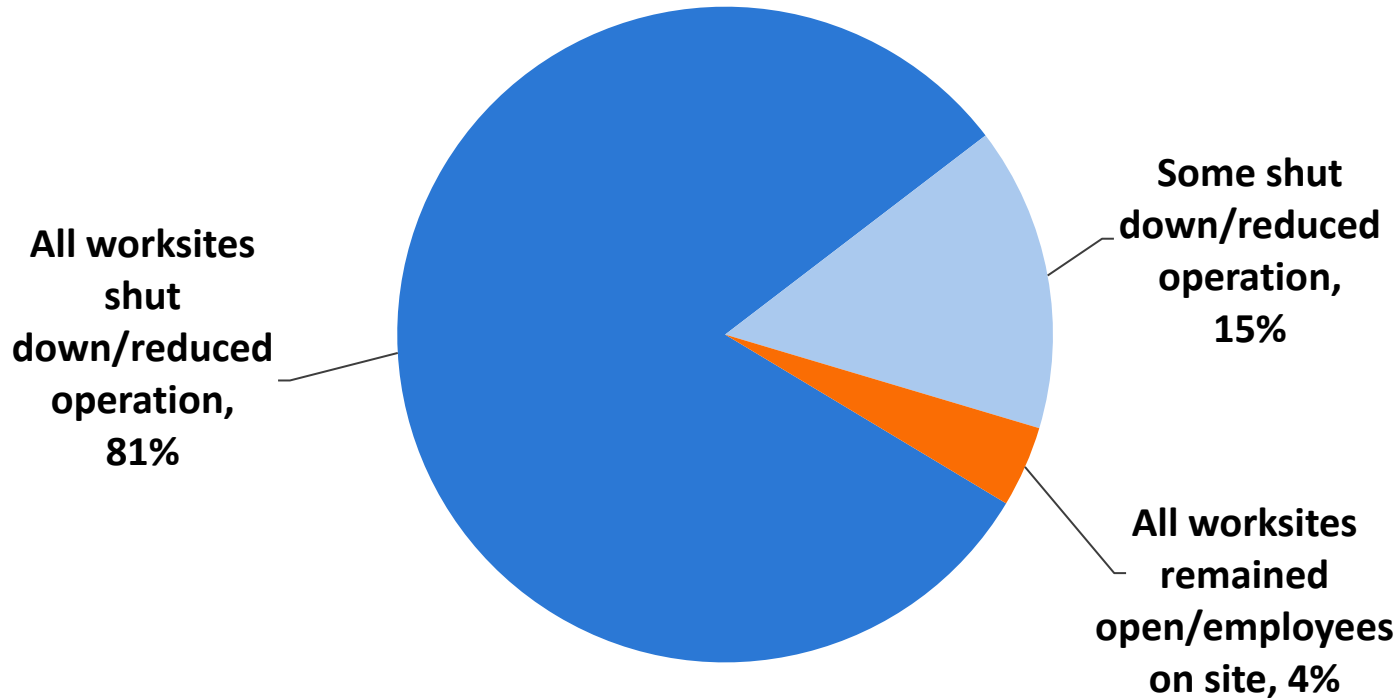
# Change in Retail Vacancy Rates Q4 2019 vs Q4 2020

(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

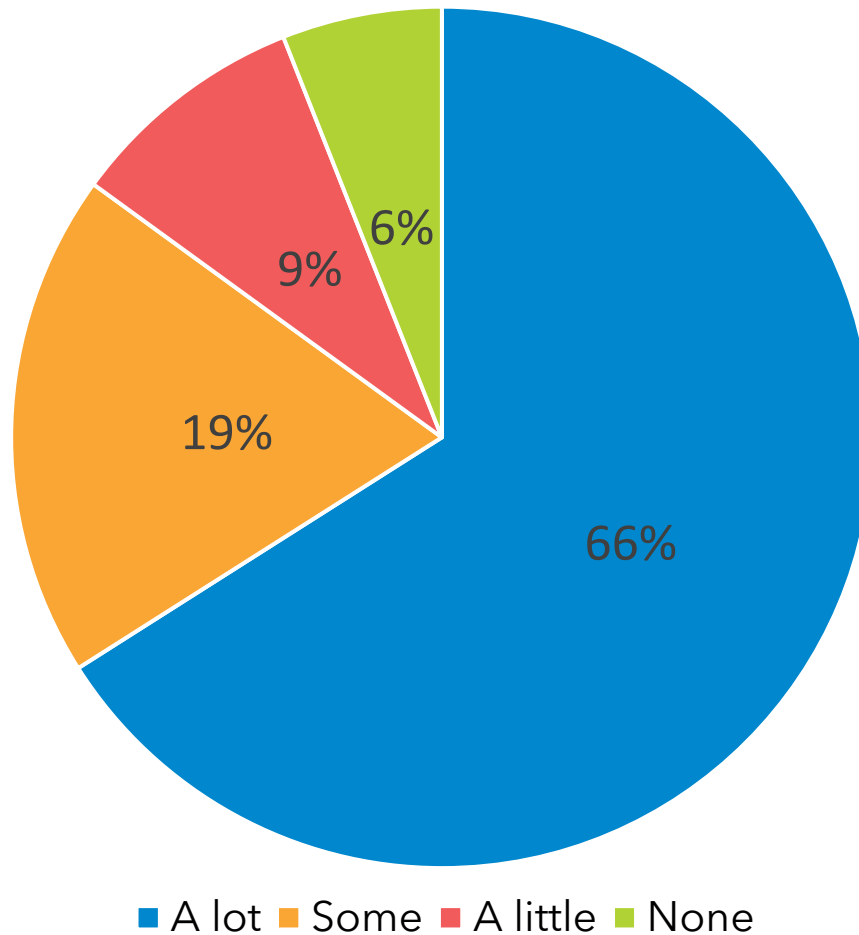


Source: Commuter Connections 2020 Employer Telework Survey

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

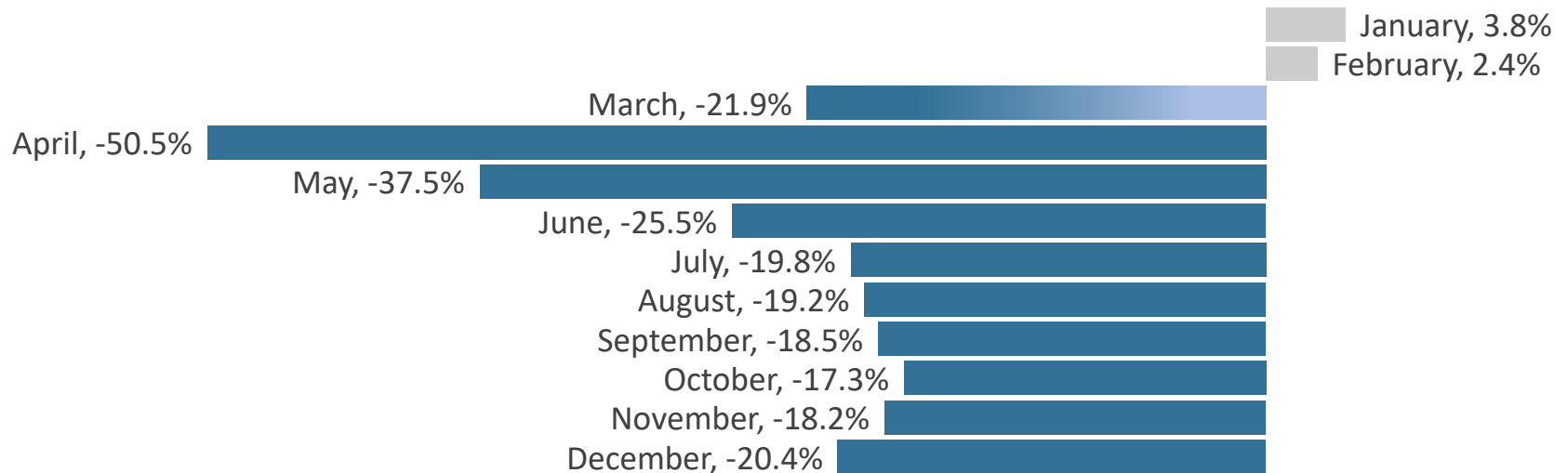


Two-thirds of respondents report their daily travel habits have changed a lot since the beginning of the COVID-19 pandemic.

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

# Roadway Traffic Volumes: Region

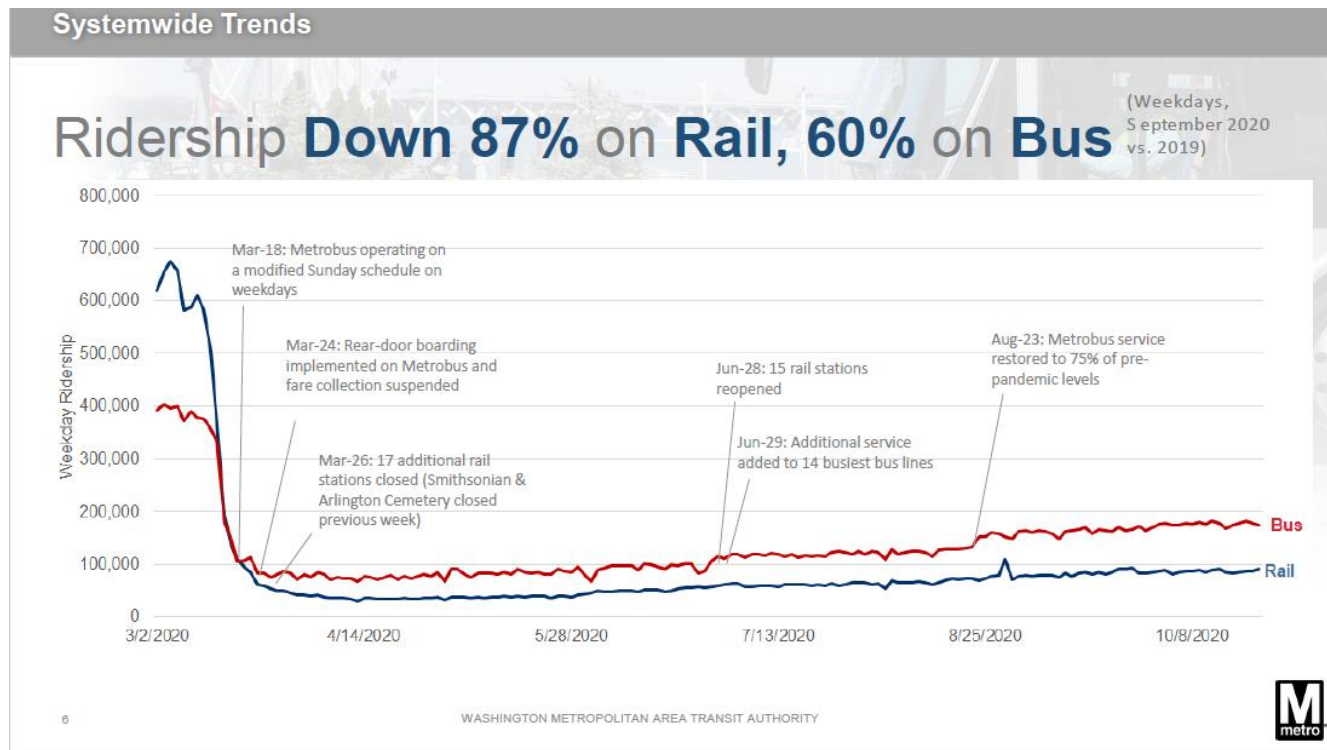
TPB Region - Monthly Average Percent Change from Equivalent 2019 Month



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.

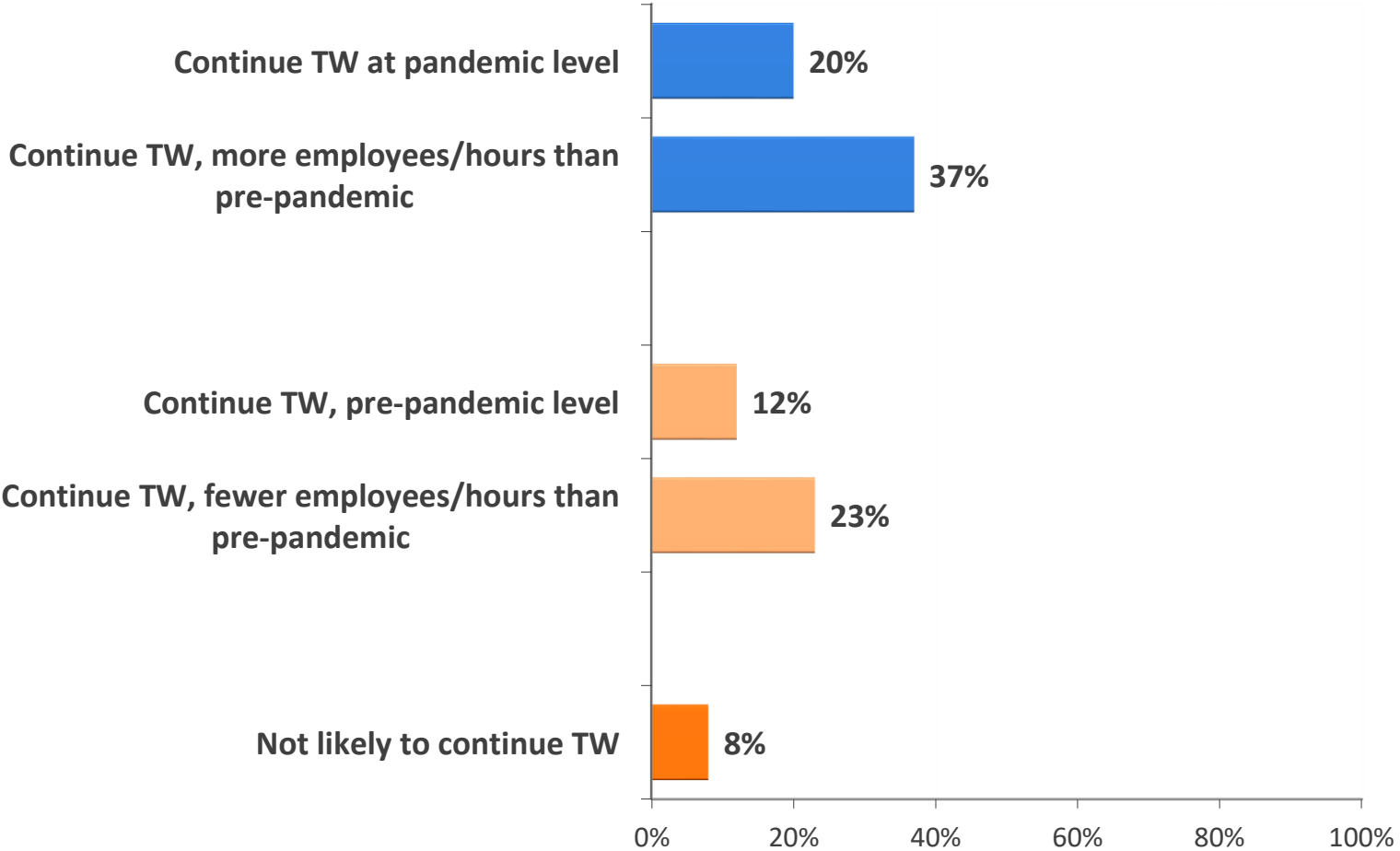
Ridership decreased as a result of both reduced demand and reduced transit capacity, underscoring the complex interrelationship of supply and demand on transit. This contrasts to roadway volume decreases, which resulted from demand reductions.

# Telework in the 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

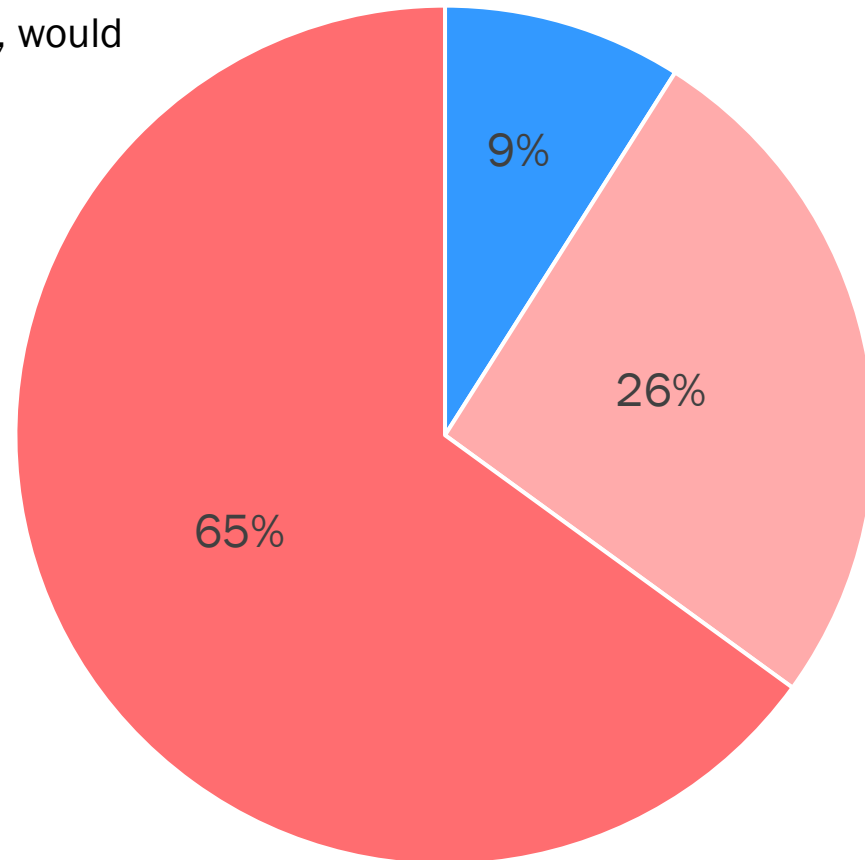


Source: Commuter Connections 2020 Employer Telework Survey

# 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...?

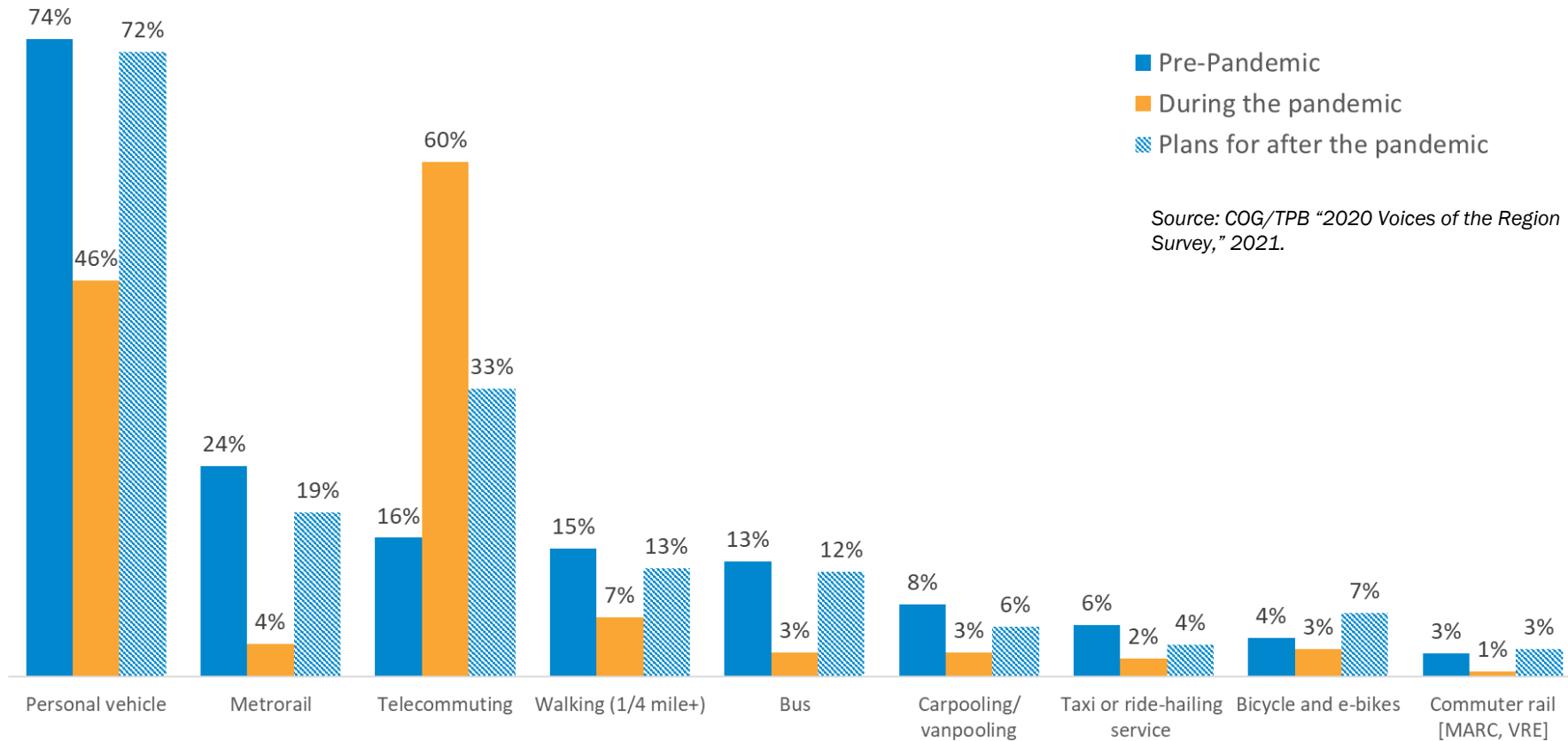
- Return to work location full-time
- Telework full-time
- Telework some days and commute to work location some days



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.

# 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?

# Panel Discussion

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