

**ITEM 10 – Information**  
June 20, 2018

Regional Travel Trends

**Staff Recommendation:** Briefing on travel trends and other key factors that influence travel behavior in the Washington region.

**Issues:** None

**Background:** Staff will present travel trends and other key factors that influence travel behavior in the Washington region. The story map presentation is the latest update to a series of presentations last provided in 2016.





## MEMORANDUM

**TO:** Transportation Planning Board  
**FROM:** Timothy Canan, Planning Data and Research Program Director  
**SUBJECT:** Travel Trends of the Metropolitan Washington Region, 2018  
**DATE:** June 14, 2018

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### KEY SUMMARY

- Between 2000 and 2007, regional Vehicle Miles of Travel (VMT) increased at a faster rate than population and jobs. Since 2007, however, while population and jobs have continued to increase and Metrorail ridership decreased, regional VMT has remained comparatively flat. This may be attributable to four overarching factors:
  1. Increased teleworking and alternate work schedules have contributed to slower growth in work trips in the region.
  2. The rapid growth in non-motorized facilities, including shared bicycle providers and dedicated routes, has prompted considerable growth in bicycle/pedestrian travel.
  3. Older adult baby boomers are retiring in large numbers and many are aging in place in the Washington region.
  4. Planning efforts are resulting in favorable alignment of land use development and transportation investment in regional Activity Centers and other areas served by transit, which can lead to slower growth in regional VMT. As a result, more planning with an emphasis of optimizing balanced land use and transportation is needed.
- Average weekday Metrorail ridership has declined since 2010. In 2017, average weekday ridership reached 613,000, its lowest point since 2000, and was down from its highest level in 2008 when it reached 752,000.

### BACKGROUND

Approximately every two years, staff briefs the TPB on the recent demographic, economic, and other characteristics that influence regional travel to provide a snapshot of travel trends in the Washington region. Staff last presented this information to TPB at its April 2016 meeting. At the June 20, 2018 TPB meeting, staff will present the latest iteration, *Travel Trends of the Metropolitan Washington Region, 2018*, which includes updated information and findings on regional travel trends.

This analysis entailed a review of updated information on population and household growth, employment growth, income trends, the influencing role of the federal government in the region, commerce trends, and the roles these factors have on regional travel. As part of this analysis, the Travel Trends update provides key indicators for regional travel, including information on the regional Vehicle Miles of Travel (VMT), travel time, travel mode share, teleworking, and trends occurring on

non-motorized vehicular travel modes. The overall findings of this analysis remain consistent with those last presented in April 2016.

## **DEMOGRAPHIC AND ECONOMIC TRENDS**

Between 2007 and 2017, the TPB region's population grew by 16%, increasing from 4.8 million to 5.6 million persons. This growth was fueled by natural increase and net international migration. The fastest-growing age group was older adult baby boomers. While not necessarily known as a retirement destination, the Washington region is increasingly hosting retiring older adults who are choosing to age in place and not relocate to other areas. During the same period, employment grew by 5.7%, increasing from 2.7 million to 2.9 million jobs.

According to estimates, there were 4.76 million persons residing in the region in 2005 and 26% of that amount was in Activity Centers. By 2015, the total population increased to 5.39 million persons, and the share within Activity Centers had increased to 28%. Thus, the population increased both in real terms and in the percentage located within Activity Centers. There were 2.98 million jobs in the region in 2005 and Activity Centers contained approximately 65%. By 2015, there were 3.16 million jobs and the percentage of jobs within Activity Centers remained unchanged.

The federal government continues to play a significant role in the economy of the region. Over the past two decades, federal employment has accounted for approximately 12% of the region's wage and salary jobs. Federal procurement spending in the Washington region plays a significant role in the region's economy as well; however, substantial spending decreases between 2010 and 2013, followed by only modest increases between 2014 and 2016 have occurred in this region. Annual federal procurement spending has not returned to pre-2013 federal budget sequestration levels. Procurement spending reached its highest amount in 2008 with \$82.4 billion. By 2016, this amount decreased to \$73.8 billion.

The region has recently experienced faster employment growth in the Leisure and Hospitality, Education and Health Services, and "Other" Services employment sectors. These jobs tend to be less concentrated in commercial centers and Activity Centers compared to jobs in historically more dominant employment sectors, including Professional and Business Services and Financial Services. In addition, commercial office vacancy rates continue to rise in the region despite decreases nationally.

## **EFFECTS ON REGIONAL TRAVEL**

Although regional weekday VMT increased steadily between 2000 and 2008, it decreased in 2009 and has remained comparatively flat since then. When adjusted for population, weekday VMT/capita increased 8.5% between 2000 and 2007, but decreased 12.7% between 2007 and 2016. This has occurred during a period of robust population growth and decreases in Metrorail ridership.

Between 2010 and 2016 when per capita VMT decreased, auto-related commute travel modes (Drive Alone, and Carpool/Vanpool) experienced decreases in their share, while all other modes experienced increases. Growth in transit and bicycle/pedestrian facilities have provided many regional commuters with additional travel choices. The region also experienced substantial increases

in teleworking. These developments, coupled with demographic shifts, have had a mitigating effect on regional VMT growth. Nevertheless, the automobile continues to be the dominant mode of travel in this region. This, coupled with declining transit ridership, results in substantial congestion that still occurs on the region's transportation system, and this congestion is significant in key areas during peak travel times. The Travel Time Index (TTI), a ratio of actual travel time to free-flow travel time, decreased on the region's interstates during the AM and PM peak from 2010 to 2012. The TTI on these facilities increased in 2013 and 2014 and remained approximately the same in 2015. It is important to underscore, however, that while the TTI may have fluctuated during this time, the region's interstates and all other facility types were still considered to be congested during peak periods. This can adversely affect quality of life, efficiency of commerce, and delivery of time-sensitive services.

The latest update of COG's Cooperative Forecasts, Round 9.1, indicate robust growth in population, households, and employment through 2045. This will result in continued increases in regional travel demand and point to the importance of including projects, programs, and policies that favorably address congestion and mobility challenges in the region's long-range transportation plan.