CRYSTAL BALL
NOT SO CRYSTAL CLEAR

TRANSPORTATION IN A POST COVID-19 WORLD
PRE-COVID 19 TRENDS

**Air Travel**
5% Growth Per Year

**Passenger Vehicles**
+2% nationally in 2019; 
+4% in West region

**Transit**
Declining nationally, ~-8% since mid-2010s, 
(growth in Central Puget Sound). Sharper 
decrease nationally for Bus than Rail.
PRE-COVID TRENDS

TNCs
(~+20-30%/yr growth for Lyft/Uber in 2019)

Micromobility
Growth and consolidation in e-scooters/bikeshare

Goods Movement
Pre-COVID, truck traffic was forecasted to continue growing much more quickly than car traffic (1.5%/year vs. 1.1%/yr nationally over next 20 years)
• >5% telework part-time or more

• ~70% traveled to job site 5 days/week

• University of Chicago and McKinsey both predict WFH to increase 3-4x post-COVID
Work-from-home post-COVID projected to remain quadrupled from pre-pandemic level

Five Distinct Mechanisms

• Better-than-expected WFH experiences
• Diminished WFH stigma
• Innovation supporting WFH
• Investments in physical/human capital enabling WFH
• Reluctance among workforce to return to pre-pandemic activities
If a COVID-19 vaccine is made widely available, which of the following would best fit your views on social distancing?
• ~10% and growing share of total retail sales
• Online shopping activity +60% during pandemic
With COVID: ~15-30% drop in retail lease rates ($/sq ft) in Manhattan, NYC

Long-Term Considerations

- Will consumer habits be retained?
- Future of brick & mortar stores/malls
- Impacts on distribution centers and last mile deliveries
- Use of AV and drones (sidewalk and/or aerial) for deliveries
• Public confidence in safety of transit/shared ride vehicles
• Larger transit properties worse financially affected (because more dependent on farebox)
• Ride-hailing services: Uber stock UP since onset of pandemic, more than general stock indices
• Changes in density and distribution of activities, especially office space
More risk-averse people stayed home when requested.

Those still on the road were less risk-averse.
ROAD SAFETY DURING COVID-19

- **SPEEDING**: UP (and enforcement DOWN)
- **SEATBELT USE**: DOWN (apparently nationally; e.g. -15% in unbelted fatalities in VA)
- **ALCOHOL/DRUG USE**: UP (among both drivers and pedestrians; from ~50% to ~65% of KSIs)
FIVE KEY LONG-TERM CONSIDERATIONS

Telework & E-Commerce
Land-Use & Real Estate
Parking & Curbside Pickup
Transit
Social Equity