

The background is a cityscape at dusk or dawn, with a blue and orange sky. Overlaid on the city are various digital icons in white circles, connected by glowing white lines. The icons include a globe, a location pin with a star, a parking 'P' sign, a lightbulb, a speech bubble, a map, a person with a gear, a storefront, and a smartphone. Dotted lines with arrows point from these icons down to a horizontal line at the bottom of the slide. Along this line are icons for a building, a Wi-Fi signal, a car, and a person walking.

New Realities and Transportation Trends Emerging from COVID

February 2022

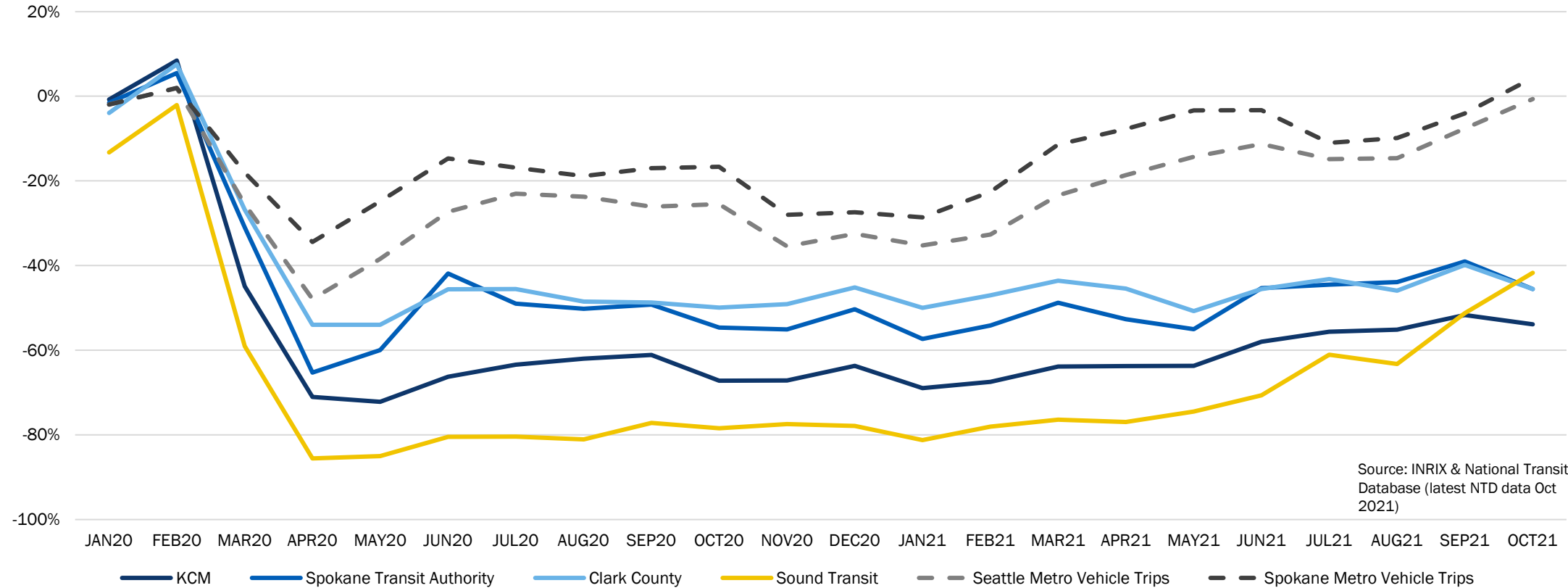
Washington State Transportation Commission

Bryan Mistele, President & CEO

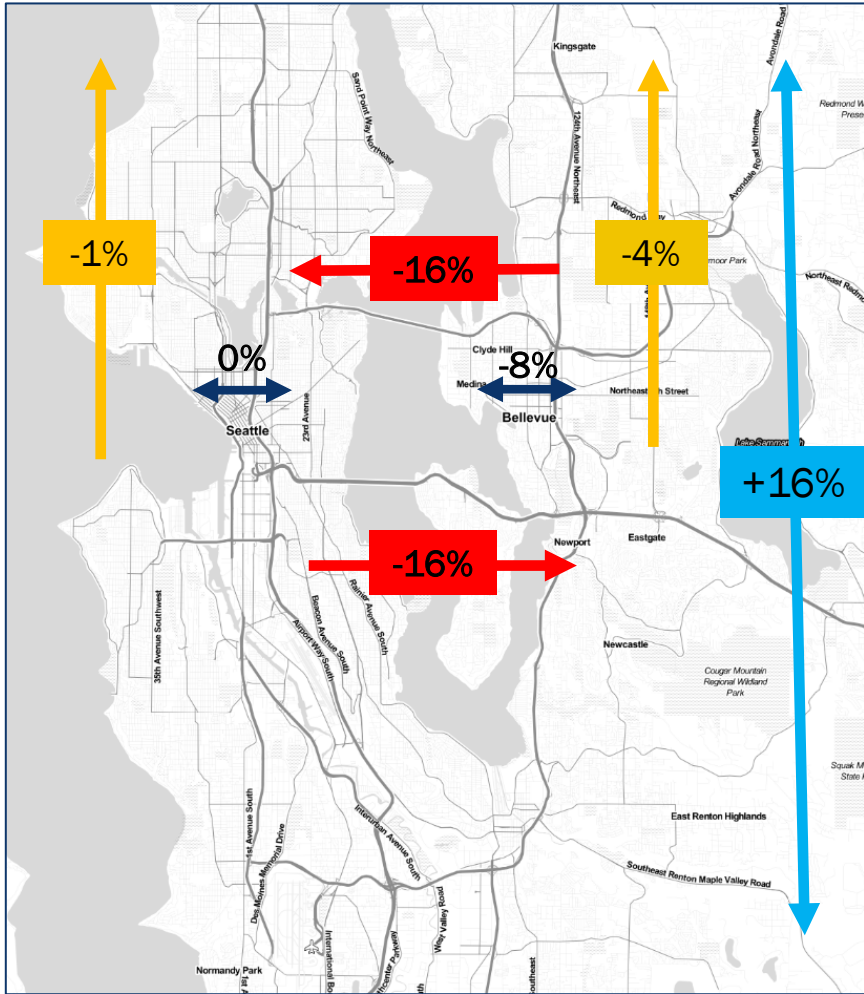
Bob Pishue, Transportation Analyst

Transit Ridership Rebound Continues to Lag Personal Vehicle Trips

Transit Ridership and Personal Vehicle Trips vs pre-COVID



How Travel has Changed Throughout the Seattle Region

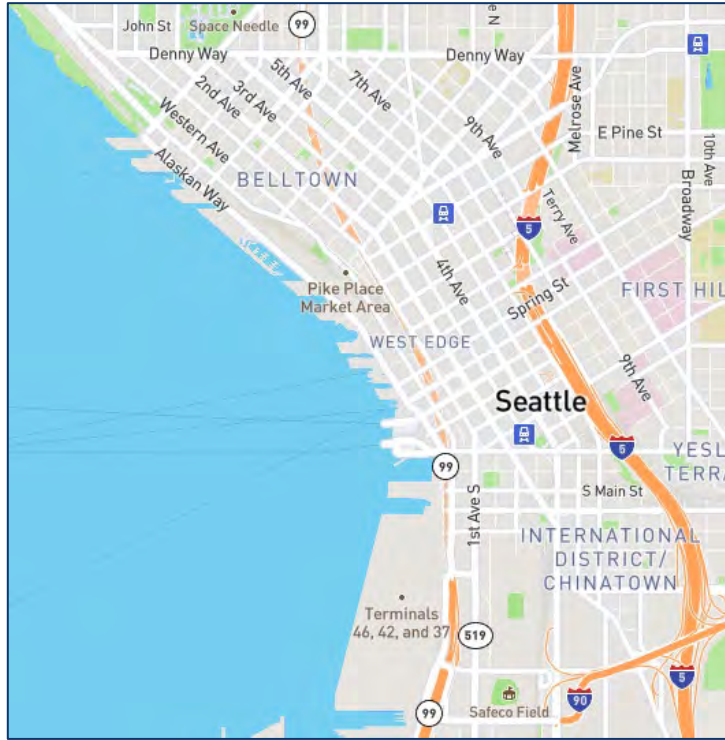


		To		
		Eastside	External	Seattle
From	Eastside	-8%	-4%	-16%
	External	-4%	16%	-2%
	Seattle	-16%	-1%	0%

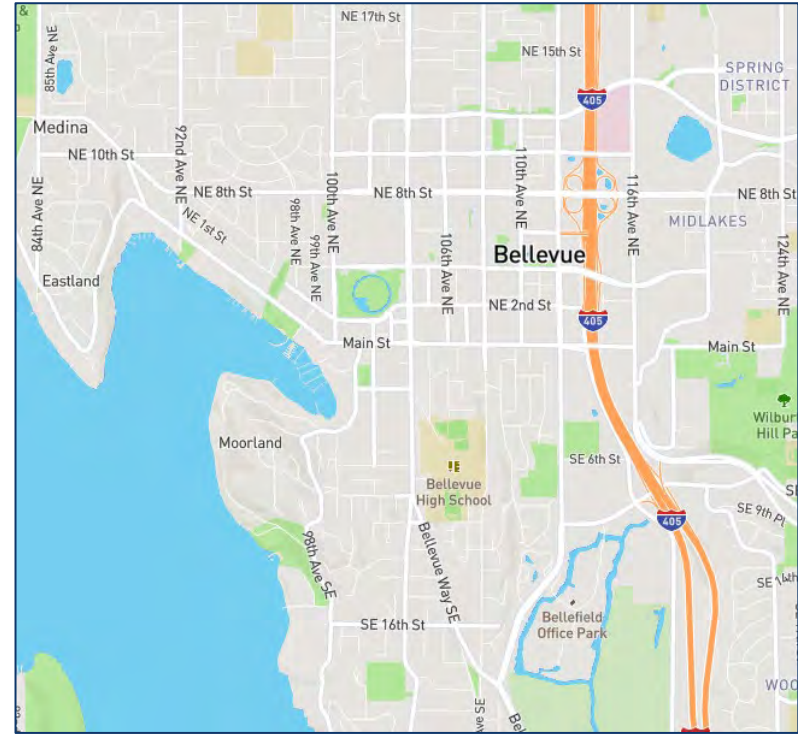
- Travel demand for crossing the lake has decreased more than other trips due to increased telecommuting.
- Travel *through* the two areas has increased by 16%, the only increase in trip type.



Travel to Dense Downtowns has Decreased Even More



-32%



-25%



Travel Speeds in the Puget Sound Region

Commuter speeds are generally above pre-COVID levels.

This indicates more travel is occurring off-peak and on weekends.

The largest increases in travel speeds occur during the morning peak on SR 520 and I-90, but look more “normal” during the evening peak, with I-5 between Seattle & Tacoma just 2% faster than in 2019 and I-405 between Bellevue & Renton 12% slower.

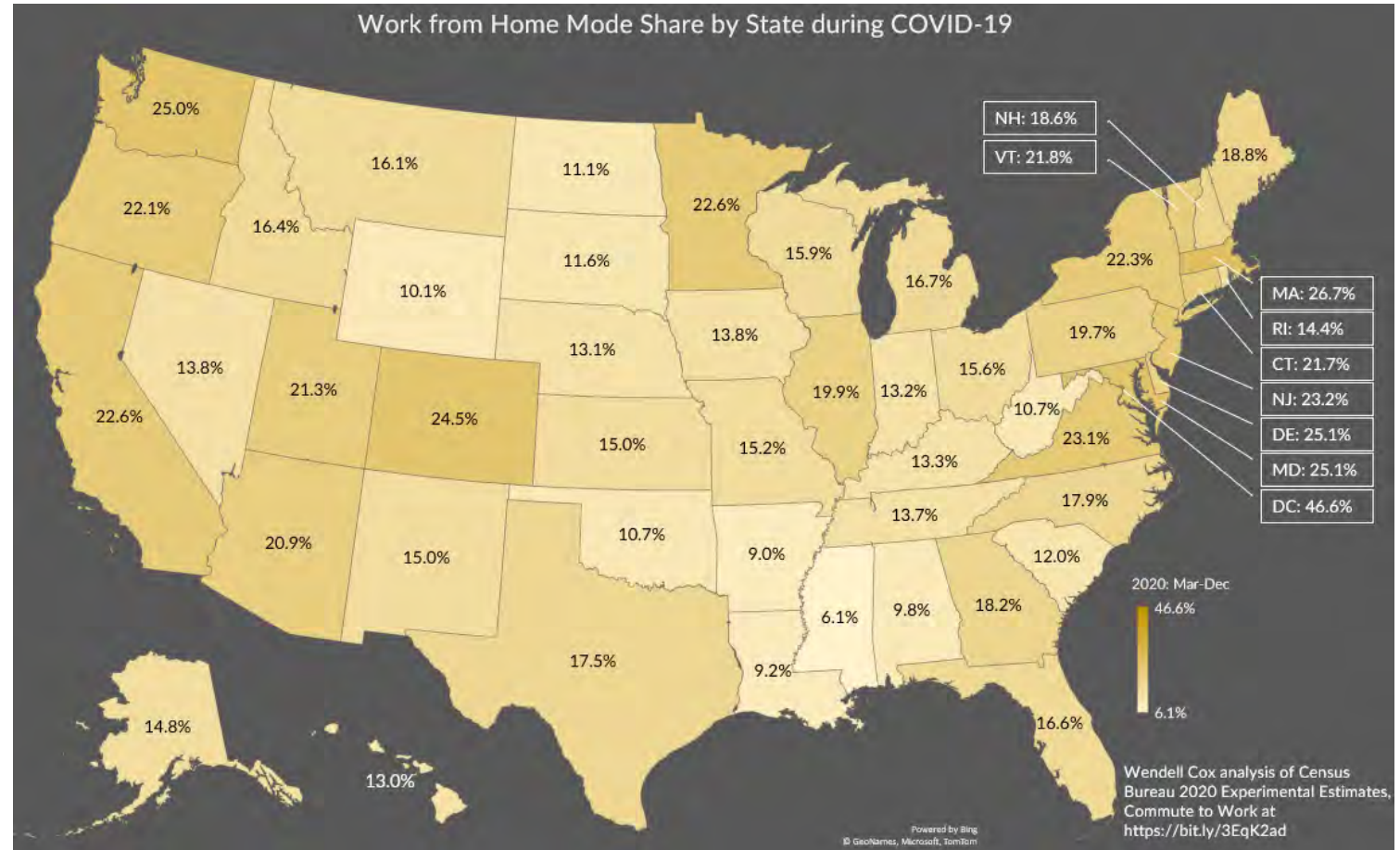
		AM Commute		PM Commute	
Into Seattle		Speed	Change	Speed	Change
2021	I-5 Everett / Seattle	42	23%	44	22%
2021	I-5 Tacoma / Seattle	38	5%	34	2%
2021	SR520	57	40%	59	7%
2021	I-90	48	34%	57	19%
2021	Ballard / DT Seattle	23	27%	21	19%
Into Bellevue		Speed	Change	Speed	Change
2021	I-405 Lynnwood / Bellevue	42	32%	50	17%
2021	I-405 Renton / Bellevue	30	1%	27	-12%



Telecommuting in Washington State has Increased under COVID

In 2019, telecommuting was 6.5% of work trips.

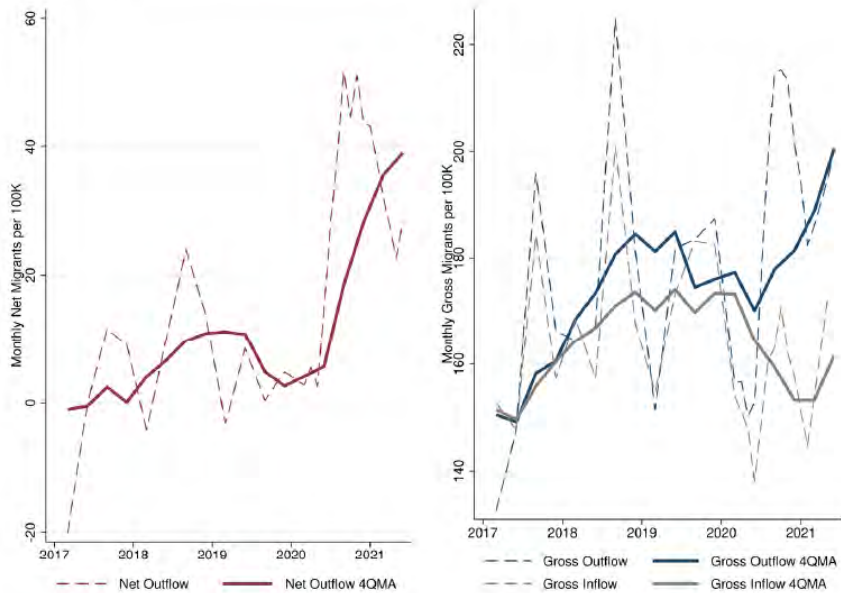
In 2020, it increased to 25% of work trips, nearly a four-fold increase.



COVID-19 Accelerated Migration Out of Urban Neighborhoods

Yet “Most didn’t move far.”

Figure A51. Estimated Gross and Net Migration into and out of Urban Neighborhoods: Seattle–Tacoma–Bellevue, WA



Sources: Federal Reserve Bank of New York/Equifax Consumer Credit Panel, American Community Survey, and author’s calculations.

Urban neighborhood defined as Census Tract > 7,000 population per sq. mile

Seattle moving on out during pandemic

The net migration out of Seattle — households moving out minus those moving in — rose dramatically in 2020, based on change of address requests. But most didn’t move far.



Top cities where Seattleites moved to last year (net)

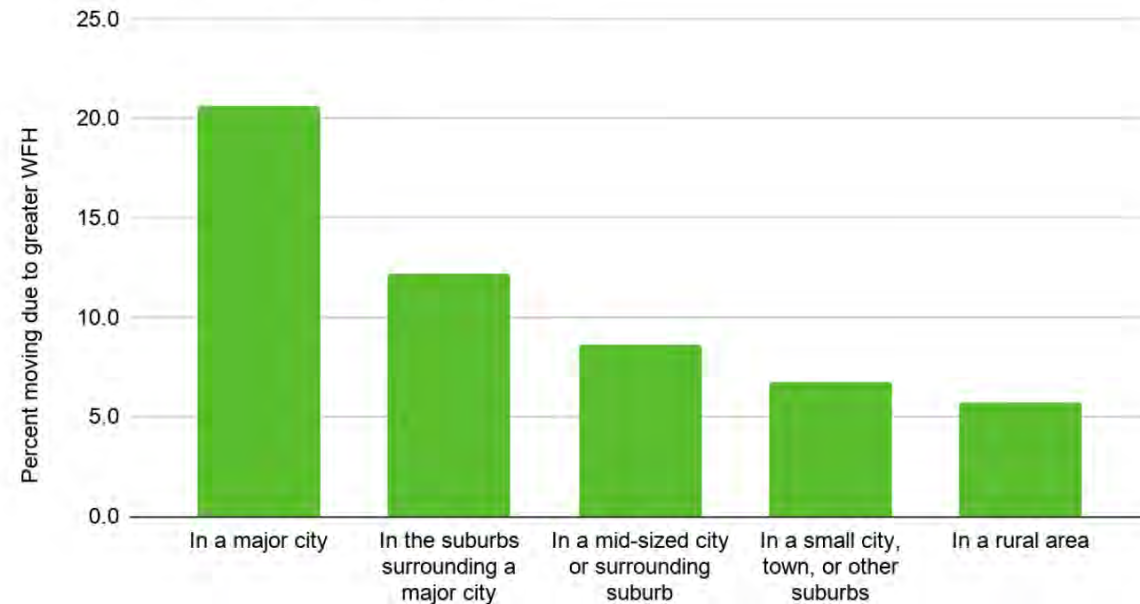


The top cities for migration to Seattle last year (net)

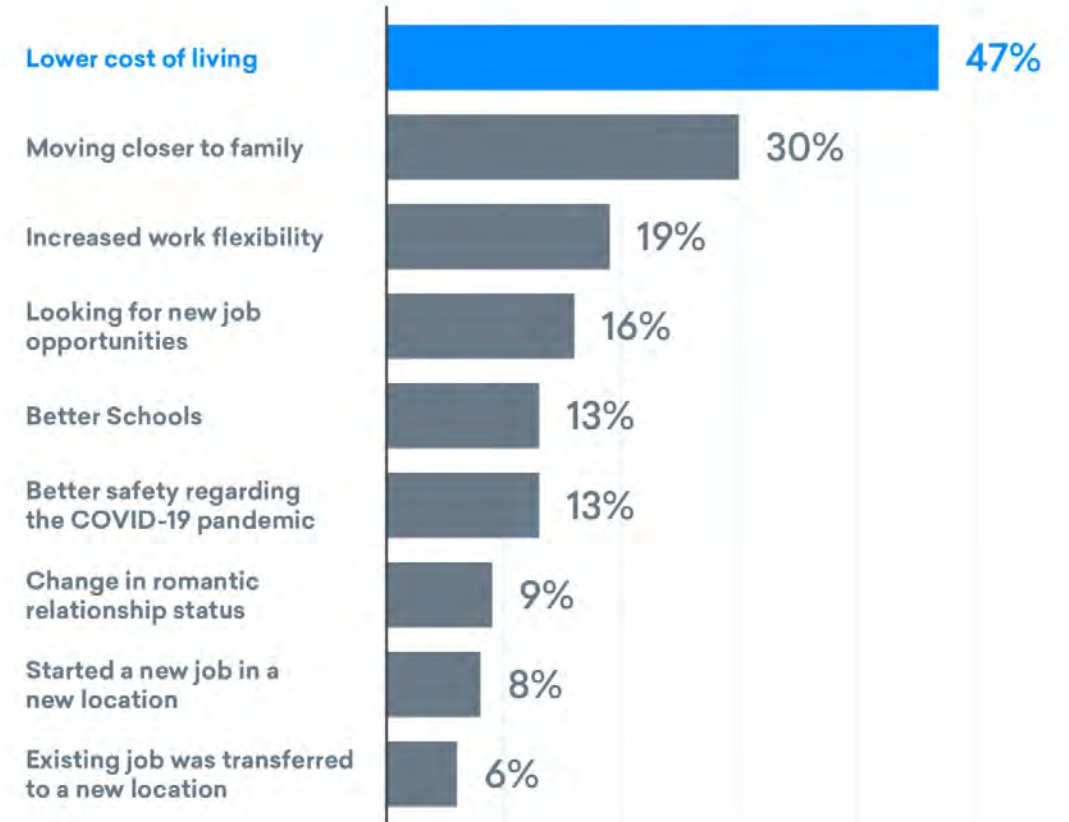


People are Moving Due to Work From Home Ability

Percent moving due to greater WFH



Why Are You Moving in 2021?



Respondents were able to select multiple answers

Source: Upwork



The New Reality: 6 Undeniable Trends

1. Commute patterns have changed probably forever

- More telecommuting (at home, 3-day weeks, etc.)
- More flexible hours (“rush hours” flatten out across the day)

2. ‘Urbanization’ has reversed to ‘de-urbanization’

- People have more flexibility to live where they want
- Significant movement out of urban core areas due to Covid-19, increase in crime, increased housing costs, etc.

3. Flexible transportation has never been more important

- Covid demonstrated fixed transportation infrastructure is obsolete – flexibility is key
- ‘Micro’ and ‘Mini’ transit vs. ‘Mass’ transit
- Ride sharing, employer shuttles, bikes, scooters, autonomous shuttles will drive the future



The New Reality: 6 Undeniable Trends

4. Electrification of everything

- Cars, busses, bikes, scooters, etc.
- Great, but this trend require clean grids or benefit is lost

5. Autonomous and semi-autonomous vehicles will greatly improve safety

- ADAS functionality, cameras, etc. already on majority of new vehicles
- Washington State should encourage AV's, not discourage them in our State

6. Dramatic investment by private sector in mobility

- Investment in mobility is very hot right now: EV/battery companies, AV's, data/analytic companies, etc.
- Washington State needs to embrace private sector investment in mobility, not discourage it

