

Emerging transportation trends study

Metro Policy Advisory
Committee

December 8, 2021

Study purpose

Scope: Major transportation trends due to the pandemic and other recent disruptions

Time frame: 2023-2023

Goals:

- Develop common understanding of changes that we've all been experiencing individually
- Identify potential changes to policy and analysis to consider during the 2023 RTP update
- Set the stage for other Emerging Trends work

Timeline

RTP

Getting Started
June to Sept.
2021

Scoping
Oct. 2021 to
early 2022

Plan Update
Feb. 2022 to
June 2023

Plan Adoption
July to Nov.
2023

Trends

**Research / select
trends**
Aug. to Oct. 2021

Analyze trends
Oct. 2021 to early 2022

**Recommend scenarios
/ policy changes**
Feb. 2022 to June 2022

We are here: collecting feedback
on potential trends from Council
and agency/community partners

What is a “trend?”

Changes are past disruptions to the status quo due to forces beyond Metro and our partners' control.

Transportation trends are changes that:

- Will continue to impact the region in the future
- Have a measurable effect on how people travel
- Are supported by existing research

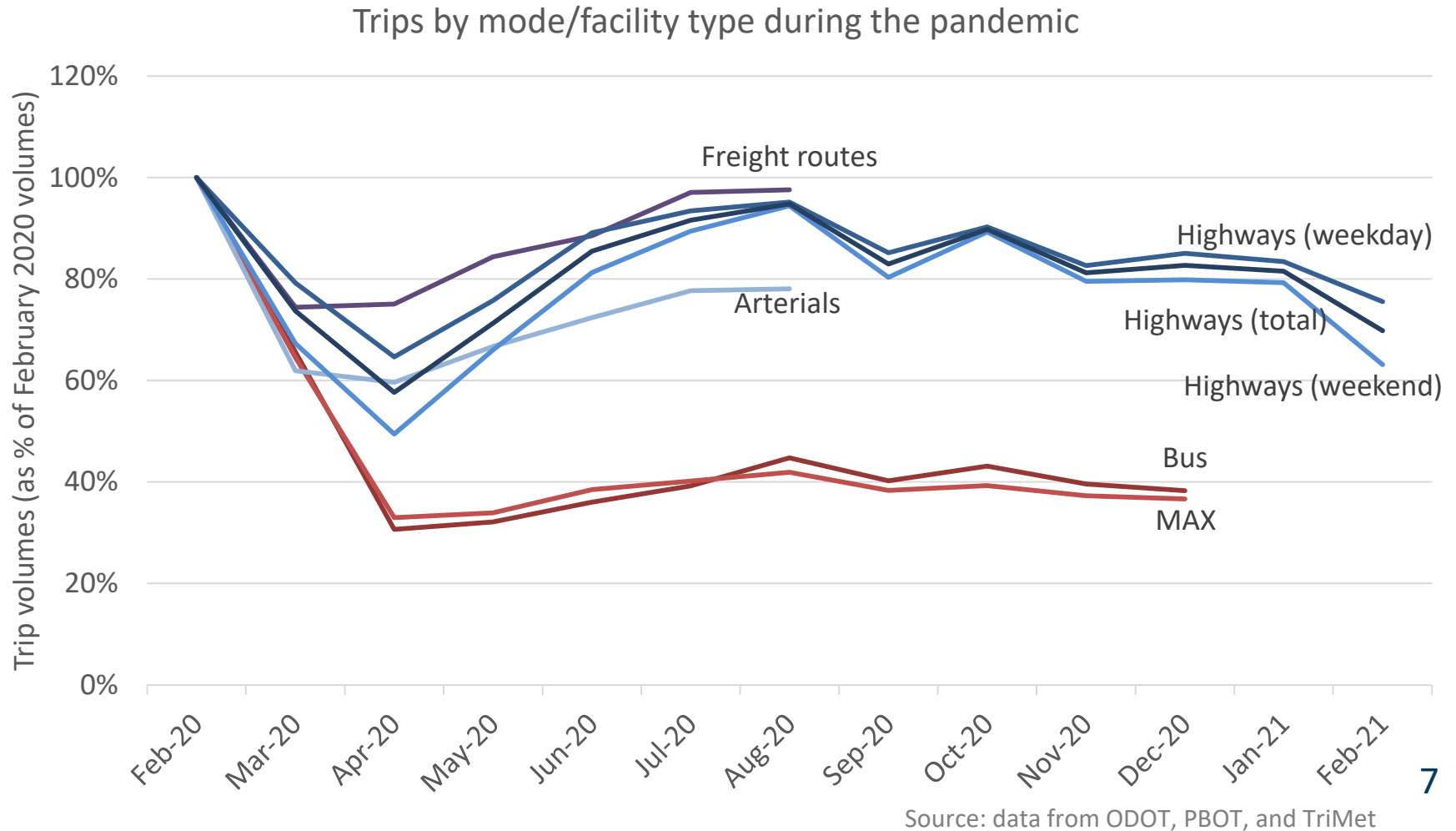
What changes have we seen?



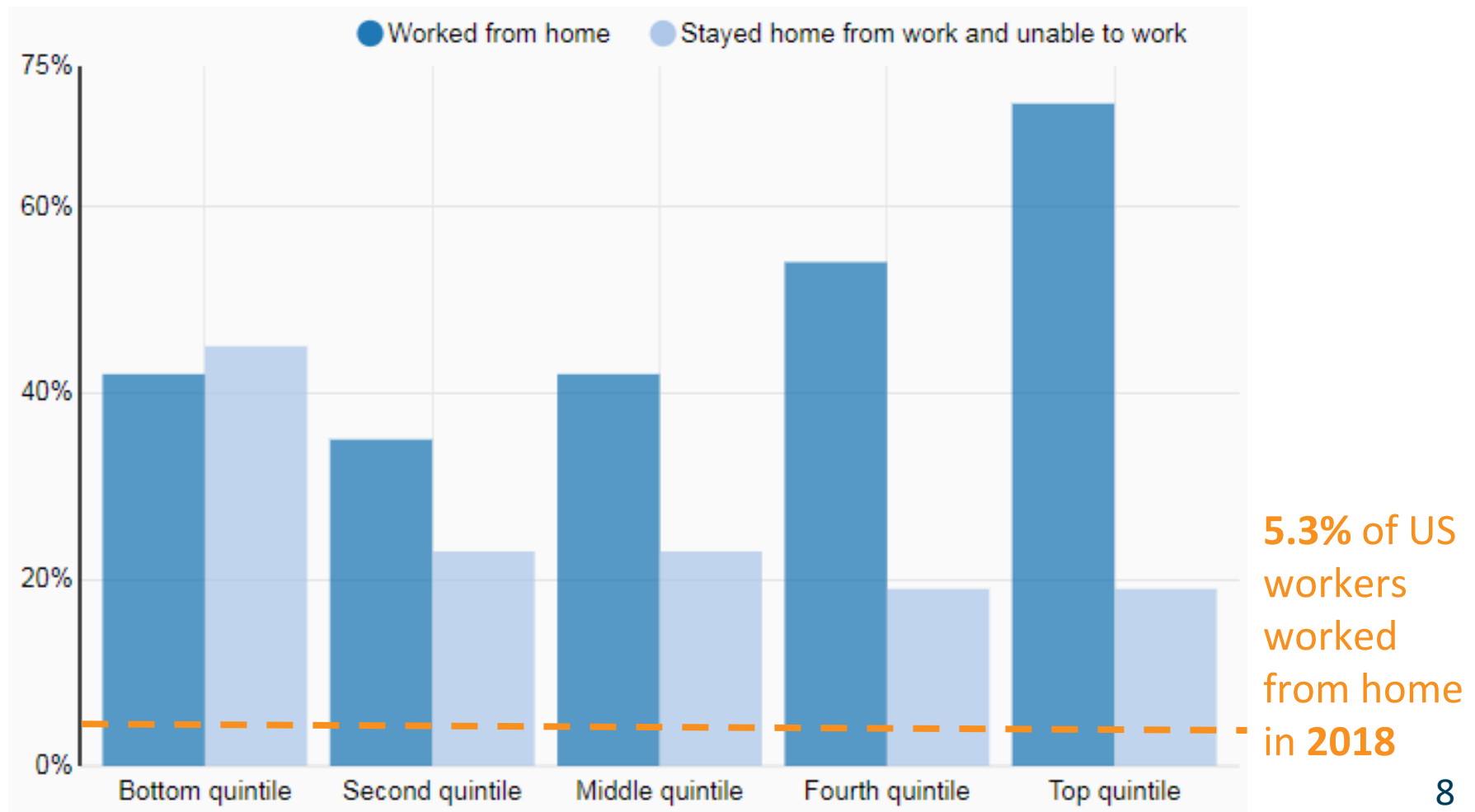
The pandemic widened the gaps for BIPOC and low-income people

- **Black and Latine Americans are 2x as likely to be hospitalized and 3x as likely to die** due to COVID as White Americans.
- **Latines** are 11% of our region's population, but **account for 22% of COVID cases**.
- **Low-income students** experienced **80% greater learning loss** due to the pandemic than the average student.
- Only **44% of lower-income Americans** say that they can **work from home**, vs. 76% of upper-income Americans.
- **33% of Asian immigrants** report experiencing **more discrimination** since the pandemic began.

People stopped traveling... and in some cases they are now starting again.



More people – especially those with higher incomes – worked from home



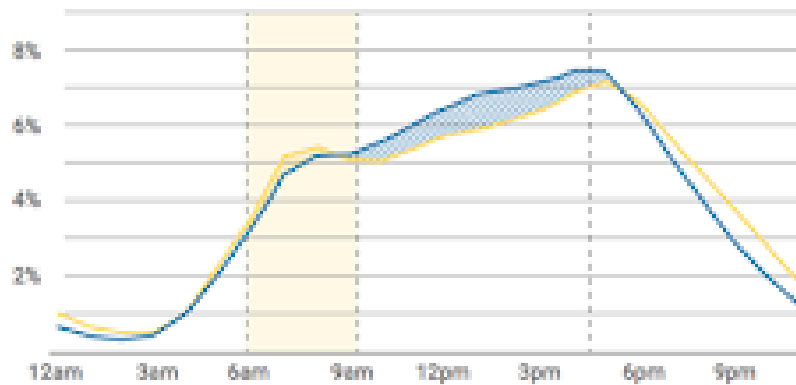
Source: Brookings Institute

People traveled less during morning rush hour and more throughout the day

DISTRIBUTION OF DAILY VMT BY TIME OF DAY

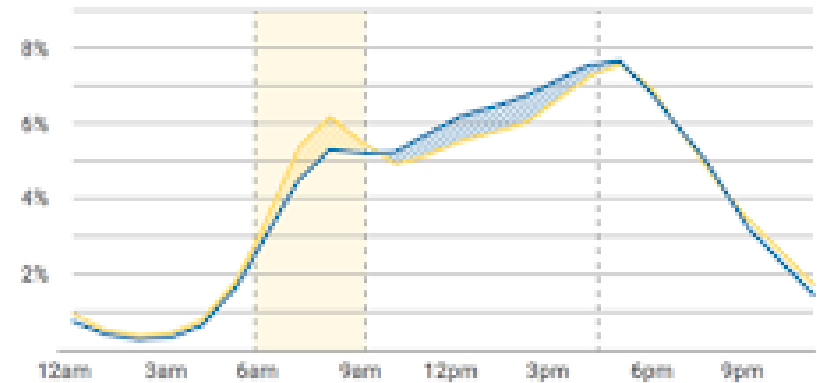
Los Angeles

STREETLIGHT
DATA



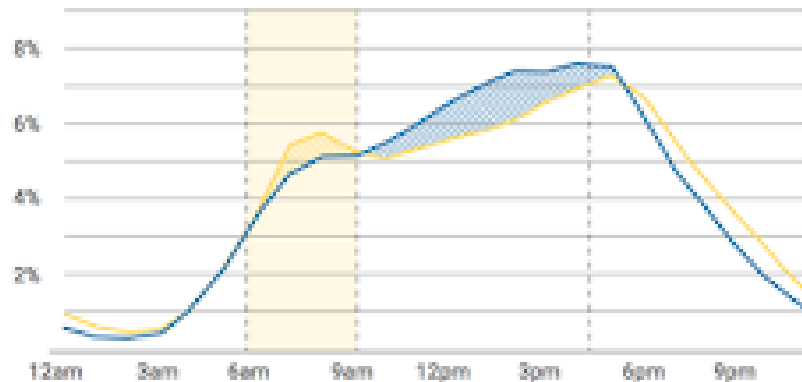
New York

STREETLIGHT
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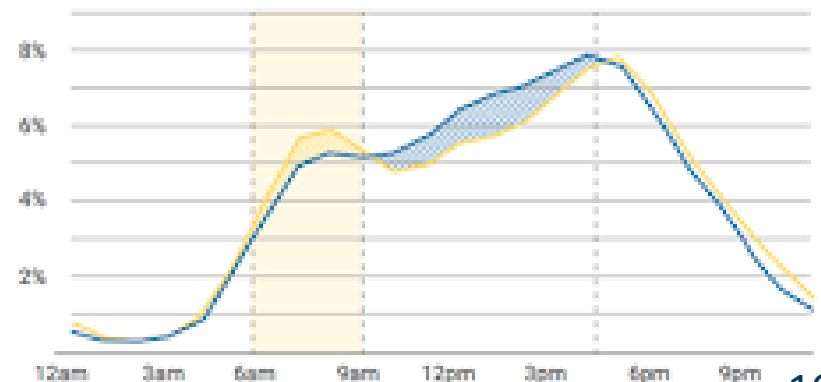
San Francisco

STREETLIGHT
DATA



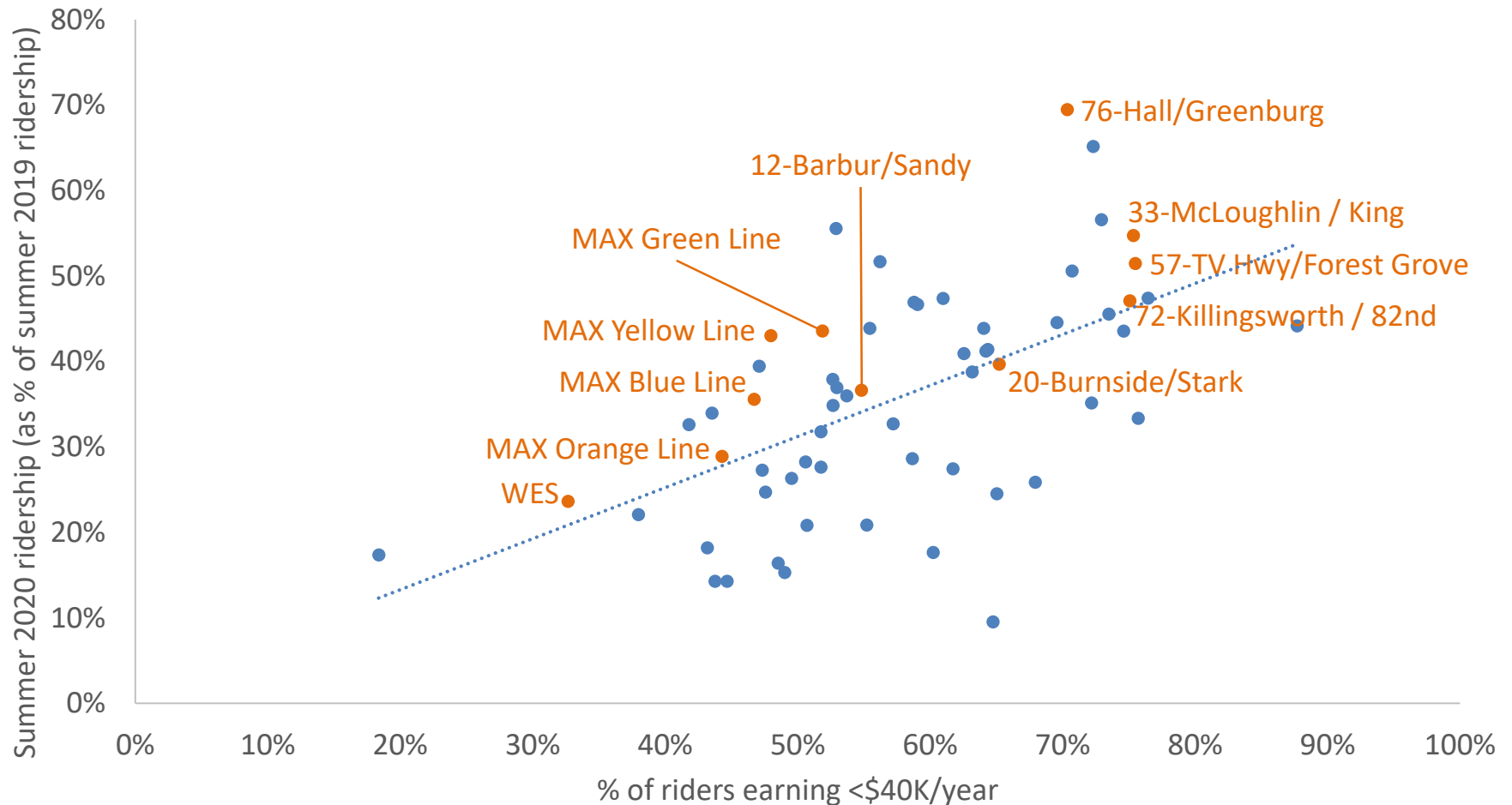
Washington, D.C.

STREETLIGHT
DATA



Many low-income people still rely on transit

Pandemic-era bus ridership vs. % low-income riders, by TriMet route



Source: TriMet ridership and survey data



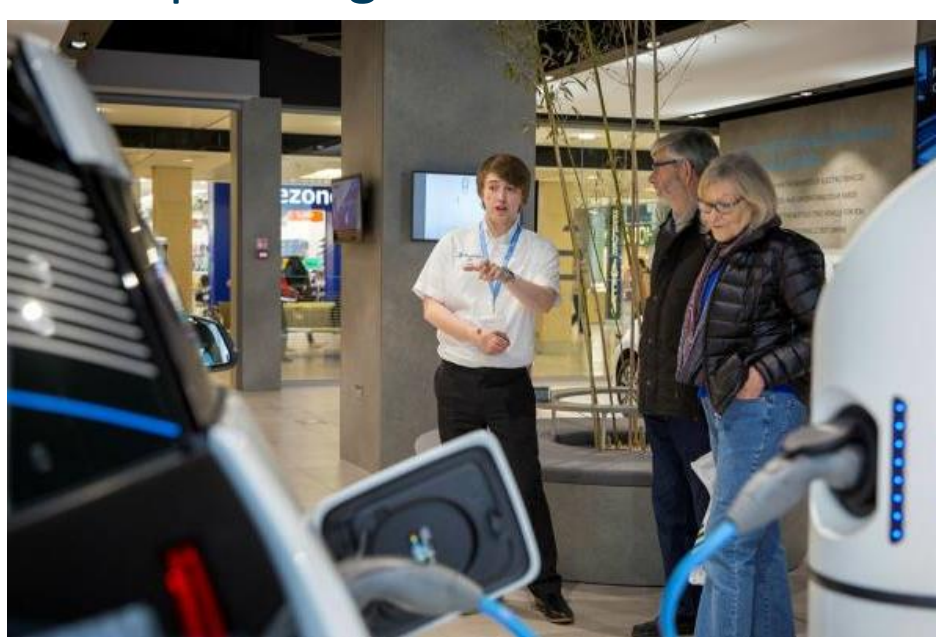
Annual growth in e-commerce sales quintupled.



Traffic deaths rose 7.2%. DWIs and speeding also increased.



Recreational bicycling boomed in many cities.



People bought many more EVs and e-bikes than expected.

We're collecting the research, but we also need to hear more of people's stories



What trends do we expect to continue into the future?



Draft list of emerging trends

1. **Transit ridership** will take several years longer than automobile traffic to return to pre-pandemic levels due to service cuts, changing travel patterns, and lingering health concerns.
2. People of color will feel increasingly less safe traveling in public because of **increased concerns about racist policing and pandemic-era anti-Asian racism**.
3. A significant share of workers will continue **teleworking** after the pandemic is over.
4. **Electric vehicles and e-bikes** will be increasingly affordable, have longer ranges, and be easier to use.
5. People will buy an increasing share of goods by **shopping online**.
6. The **boom in recreational bicycling** during the pandemic could create an opportunity to further increase bicycle trips.
7. Agencies will face the challenges of pandemic recovery (as well as other unanticipated changes) with **limited resources and outdated processes**.
8. The **increase in traffic deaths** seen during the pandemic will continue into recovery.

Potential trends to be studied

| TREND | INFLUENCE | | | RESEARCH | CONFIDENCE |
|--|-------------|-------------|------|----------|------------|
| | 2022 | 2027 | 2032 | | |
| Transit ridership recovers slowly | <div></div> | | | ● ● ● | ● ● ● |
| Autonomous vehicle adoption accelerates | | <div></div> | | ● ● ● | ● ● ● |
| Severe and fatal crashes remain high | <div></div> | | | ● ● ● | ● ● ● |
| Pandemic-level teleworking continues | <div></div> | | | ● ● ● | ● ● ● |
| E-commerce increases | <div></div> | | | ● ● ● | ● ● ● |
| Pandemic travel behavior persists | <div></div> | | | ● ● ● | ● ● ● |
| Limited resources hinder public agency recovery | <div></div> | | | ● ● ● | ● ● ● |
| Temporary gathering places for communities persist | <div></div> | | | ● ● ● | ● ● ● |
| Racial and economic disparities persist* | <div></div> | | | ● ● ● | ● ● ● |
| Racism makes people of color feel less safe in public* | <div></div> | | | ● ● ● | ● ● ● |
| Car ownership increases | <div></div> | | | ● ● ● | ● ● ● |
| Electric vehicles and e-bikes are more affordable | | <div></div> | | ● ● ● | ● ● ● |
| Parking and loading at curb increase in suburbs | <div></div> | | | ● ● ● | ● ● ● |
| Recreational cycling boom persists | <div></div> | | | ● ● ● | ● ● ● |

* We will identify the disparate impacts of all trends on people of color and low-income people

Discussion and feedback

- Which trends does are most important to focus on?
- Are we describing these trends in a way that reflects our regional goals and the needs of the people we serve?

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