

Memorandum

Date: September 28, 2021
To: Eliot Rose, Metro
From: Cadell Chand, Briana Calhoun, and Anjum Bawa; Fehr & Peers
Subject: **Metro Emerging Trends Background Research Task 1.1**

PT21-0061

Introduction

This memorandum summarizes our assessment of potential trends for consideration in Metro's Emerging Transportation Trends study. The potential trends here were identified by Metro staff and by Fehr and Peers based on background research conducted by both groups. The goal of this handout is to facilitate a discussion about which trends should be included in the study – of the 14 potential trends here, we have the capacity to include up to 10 in our analysis – and about how to tell the story of these trends in a way that reflects people's lived experience and the region's transportation goals. Input from stakeholders including Metro Council, JPACT, TPAC, MTAC, jurisdictional and CBO partners will inform further research and analysis of these trends.

What is a trend?

Our region has seen a lot of **changes** – disruptions to the status quo due to forces beyond Metro and our partners' control – in the past five years. **Trends** are changes that have significant impacts that (1) are expected to last at least five years into the future and (2) have a measurable relationship to how, when, where, or why people travel (which also means that there has to be enough supporting research and information for us to be able to forecast the impacts of the trend). We will be examining the effects of these trends on how people travel in the region and on performance measures that reflect RTP goals.

Table 1 on the next page identifies potential trends for Metro to consider, as well as the level of research supporting each trend, the level of confidence that the trend will continue to impact the region in both the short and long term, and any disparate impacts associated with each trend. The COVID-19 pandemic exacerbated many of the disparities that already existed in the region, and we present this information to help Metro focus on the trends that have had the greatest impact on those most in need. Figure 1, at the end of this memorandum, summarizes most of this information in a single page to support discussion.

Table 1. Level of Research and Confidence in Understanding of Trends

#	Trend	Equity & Disparities	Level of Research	Short Term Confidence (1-5 years)	Long Term Confidence (>5 years)
1	The racial and economic disparities from the pandemic will continue to affect people.	We will identify disparate impacts of all included trends on people of color and low-income people.	Moderate	Low	Moderate
2	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.	Decreased transit ridership and potential service cuts will likely impact people of color and people with lower incomes most heavily because of their reliance on transit. Routes with high BIPOC/low-income ridership have maintained ridership more than other lines.	High	High	Low
3	People of color will feel even less safe in public than before because of increased concerns about racist policing and pandemic-era anti-Asian racism.	Personal safety has a much greater influence over people of color's travel choices than it does for White people, and different types of investments may be needed to address these safety concerns.	Moderate	Moderate	Low
4	A significant share of workers will continue teleworking after the pandemic is over.	Low-income workers are much more likely to be unable to work from home than high-income workers. Digital access may have a greater influence on access to career-ladder job opportunities moving forward.	High	Moderate	Moderate
5	The shift in travel behavior seen during the pandemic, including fewer commute trips during peak hours, and more local shopping trips throughout the day, will continue post-pandemic.	Much of this shift is driven by higher-income people working from home and shopping online. Lower-income travelers may not be experiencing the same type of changes.	Moderate	Moderate	Low

#	Trend	Equity & Disparities	Level of Research	Short Term Confidence (1-5 years)	Long Term Confidence (>5 years)
6	Electric vehicles and e-bikes will be increasingly affordable, have longer ranges, and be easier to use.	Electric vehicles may become accessible to those who can't currently afford them. These changes call into question whether common strategies to promote electrification, such as providing rebates and charging for electric vehicles, are equitable and effective.	Low	Low	Low
7	People will buy an increasing share of goods online.	People with higher incomes are more likely to shop for groceries and food online. Competition from large online retailers and fees from delivery services are challenges for small businesses, including restaurateurs of color.	Low	Moderate	Moderate
8	Autonomous vehicle adoption will occur more rapidly in response to a decrease in comfort with shared travel and increased demand for AV delivery.	AV options may not be affordable for lower-income individuals and households. AV delivery could also increase disparities associated with online shopping.	High	N/A	Moderate
9	The boom in recreational bicycling during the pandemic could create an opportunity to further increase bicycle trips.	Lack of safe streets in communities of color can limit opportunities to increase bicycling.	Low	Low	Low
10	Agencies will face the challenges of pandemic recovery (as well as other unanticipated changes) with limited resources and outdated processes.	Agencies that serve lower-income communities often had fewer resources prior to the pandemic, and are particularly likely to be strained.	Moderate	Moderate	Moderate
11	Communities will continue emphasizing and encouraging tactical urbanism.	Lower-income communities are less likely to have capacity and complementary infrastructure to support tactical urbanism.	Moderate	Moderate	Low

#	Trend	Equity & Disparities	Level of Research	Short Term Confidence (1-5 years)	Long Term Confidence (>5 years)
12	Households will own more cars as they rely on more on personal vehicles and less on transit and other shared modes due to reduced service and/or health concerns.	If people need to shift to driving to meet their transportation needs it would increase transportation costs, creating a higher burden on low-income people.	Low	Low	Low
13	The increase in severe and fatal crashes seen during the pandemic will continue into recovery.	People of color and low-income people are significantly more likely to be injured or killed in crashes.	High	Moderate	Moderate
14	Demand for parking and passenger loading curb space will increase in suburban areas and decrease in urban areas.		Low	Low	Low