

# IMPACTS OF THE COVID-19 PANDEMIC IN THE NATIONAL CAPITAL REGION

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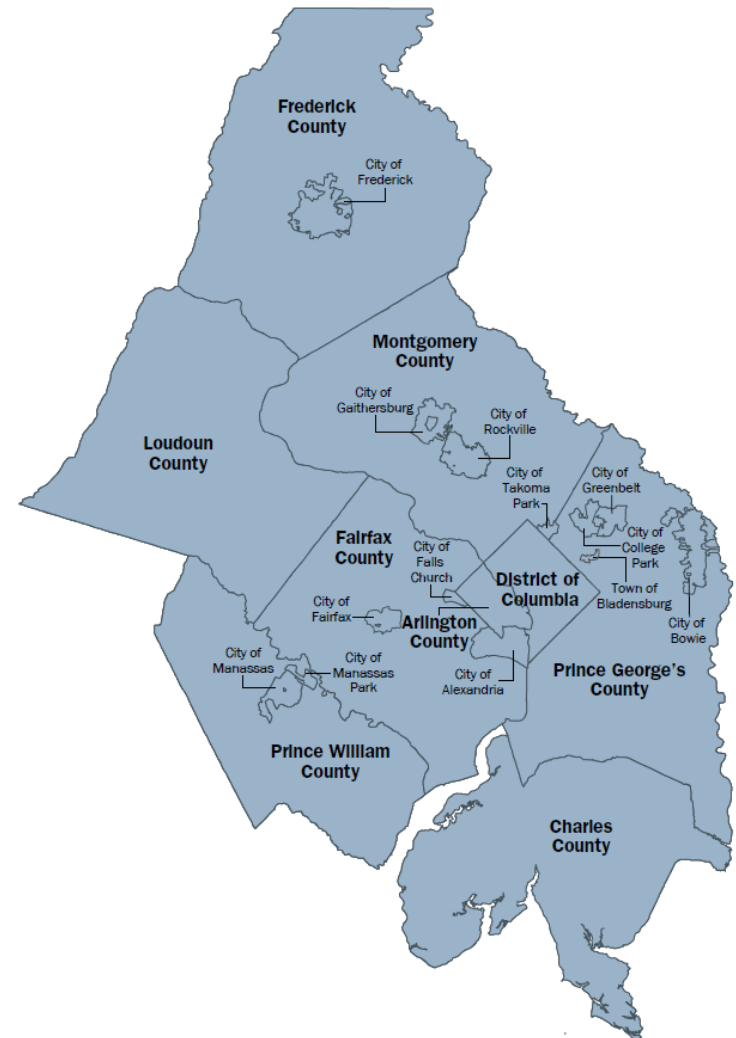
Reston Task Force  
May 10, 2021



Metropolitan Washington  
Council of Governments

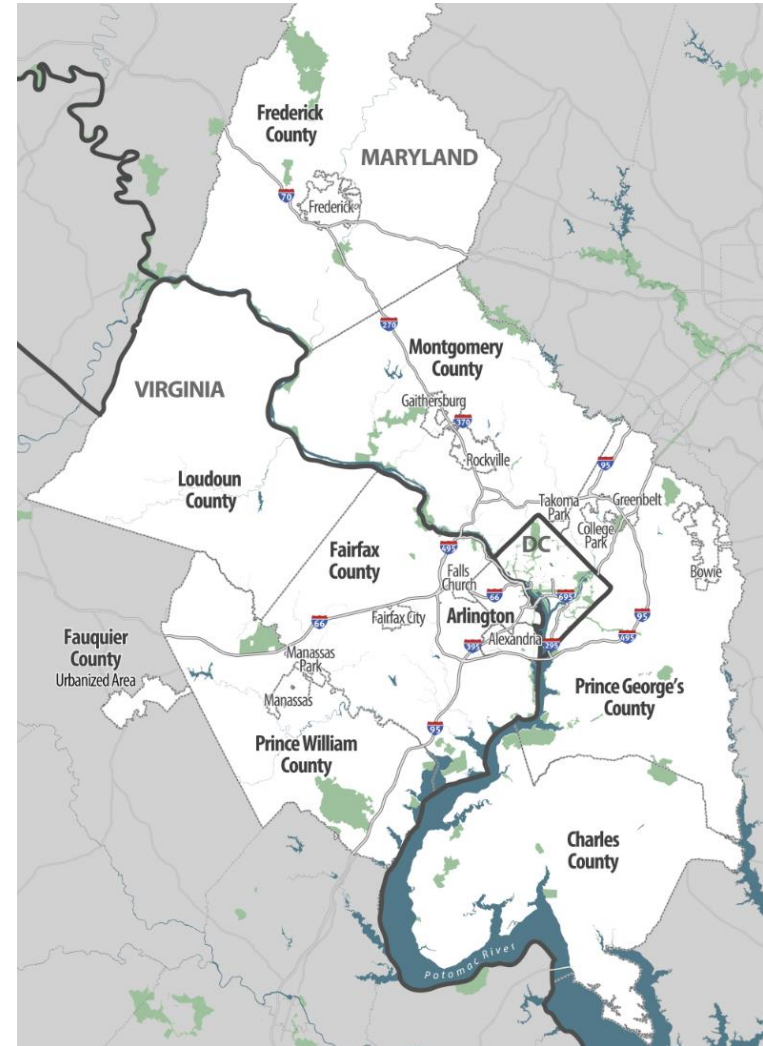
# About COG

- Metropolitan Washington Council of Governments (COG) is an independent, nonprofit association of local governments
- Brings area leaders together to address major regional issues in the District of Columbia, suburban Maryland and Northern Virginia
- Membership comprises 300 elected officials from 22 local governments, the Maryland and Virginia state legislatures, and U.S. Congress



# About TPB

- National Capital Region Transportation Planning Board (TPB) is the federally-designated Metropolitan Planning Organization (MPO) for the region
- Plays an important role as the regional forum for transportation planning
- Prepares plans and programs that the federal government must approve for federal-aid transportation funds to flow to metropolitan Washington



# COVID Cases & Deaths in Washington, DC Metro Area

	ON MARCH 1	DAILY AVG. IN LAST 7 DAYS	PER 100,000	14-DAY CHANGE	TOTAL REPORTED
Cases	738	1,018	16	-30% ↘	400,540
Deaths	54	50	0.80	+153% ↗	6,685

New cases



Deaths



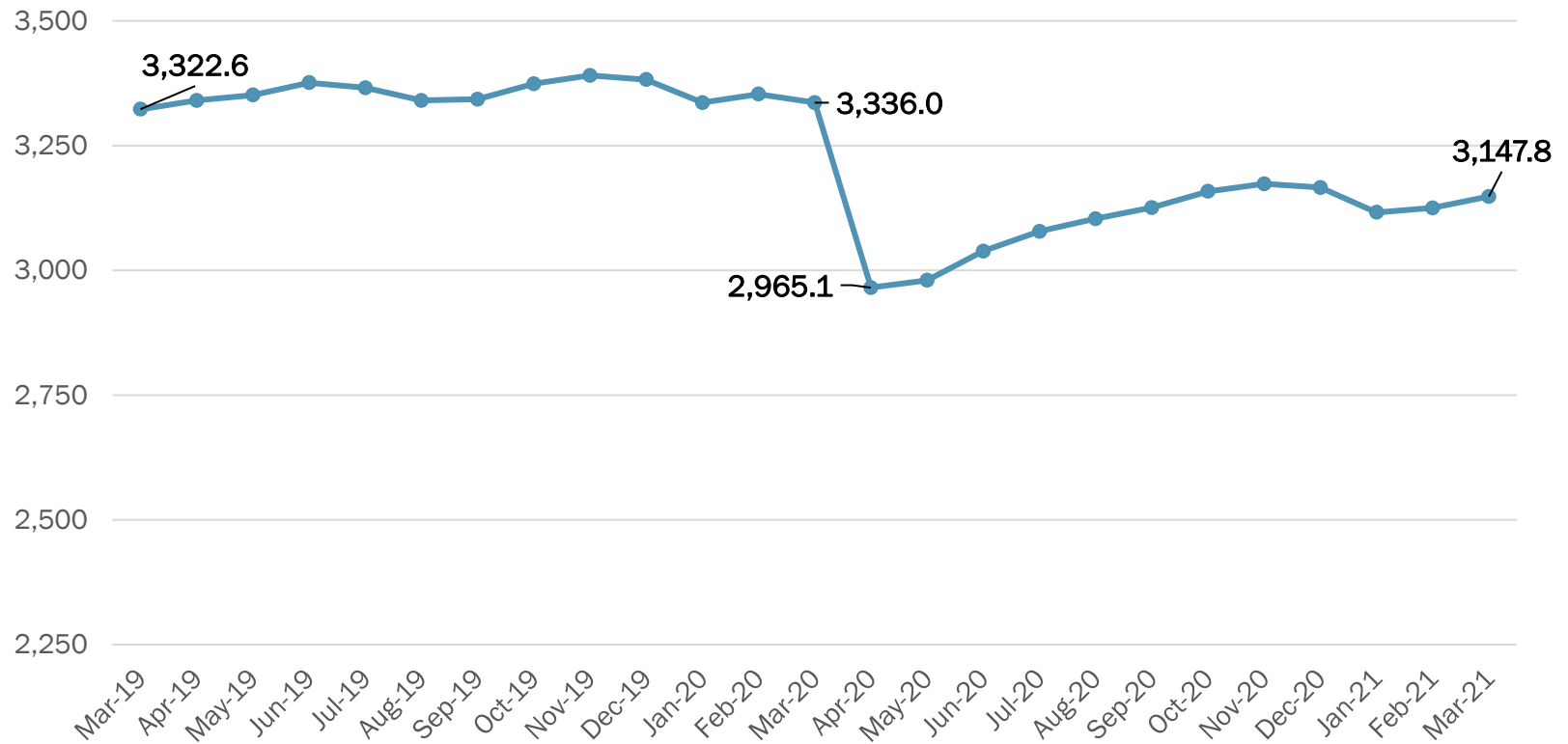
New York Times Cases & Deaths Tracker: <https://www.nytimes.com/interactive/2020/us/covid-cases-deaths-tracker.html#USA-MSA47900>. The Times uses reports from state, county and regional health departments.

**March 1 Update:** Over several days, Virginia added many deaths that occurred earlier in 2021.

# Non-Farm Jobs (000s) - Washington MSA

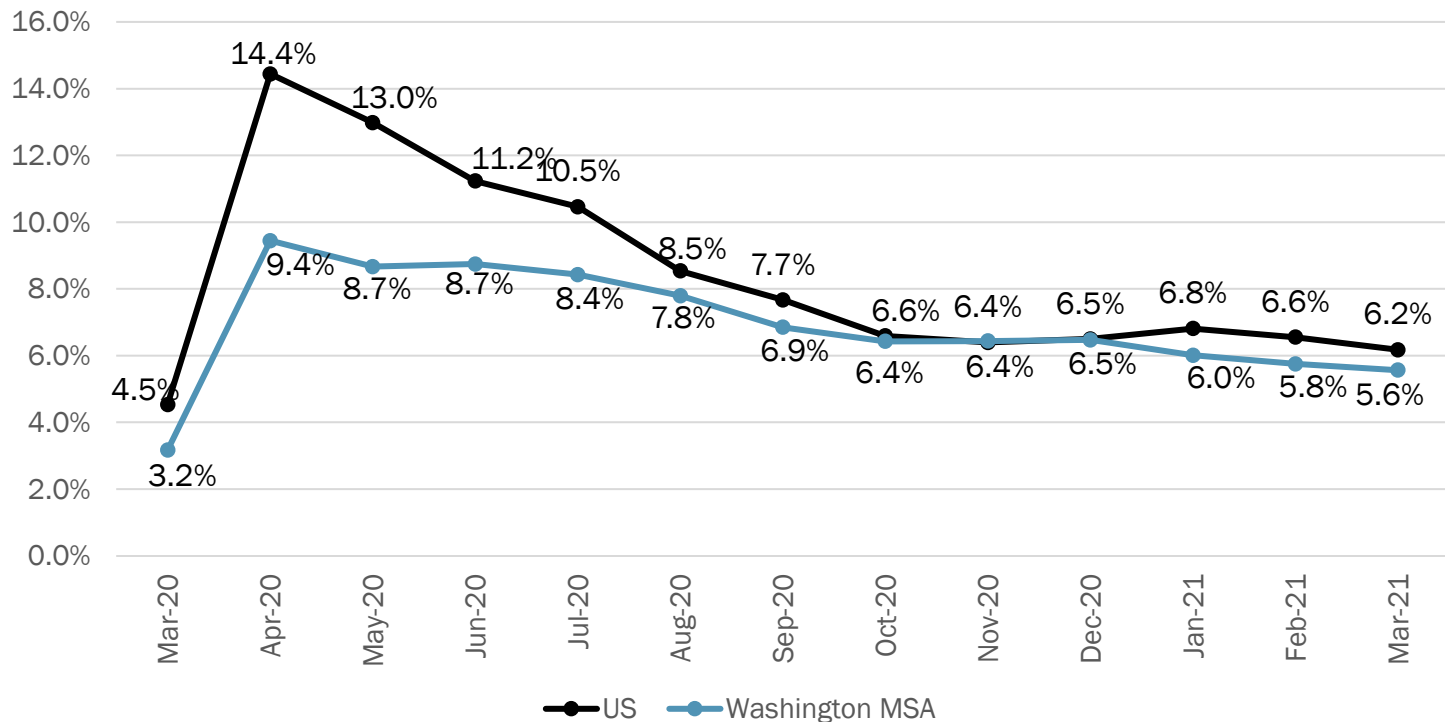
March 2019 to March 2021

(Bureau of Labor Statistics, Not Seasonally-adjusted, Thousands)



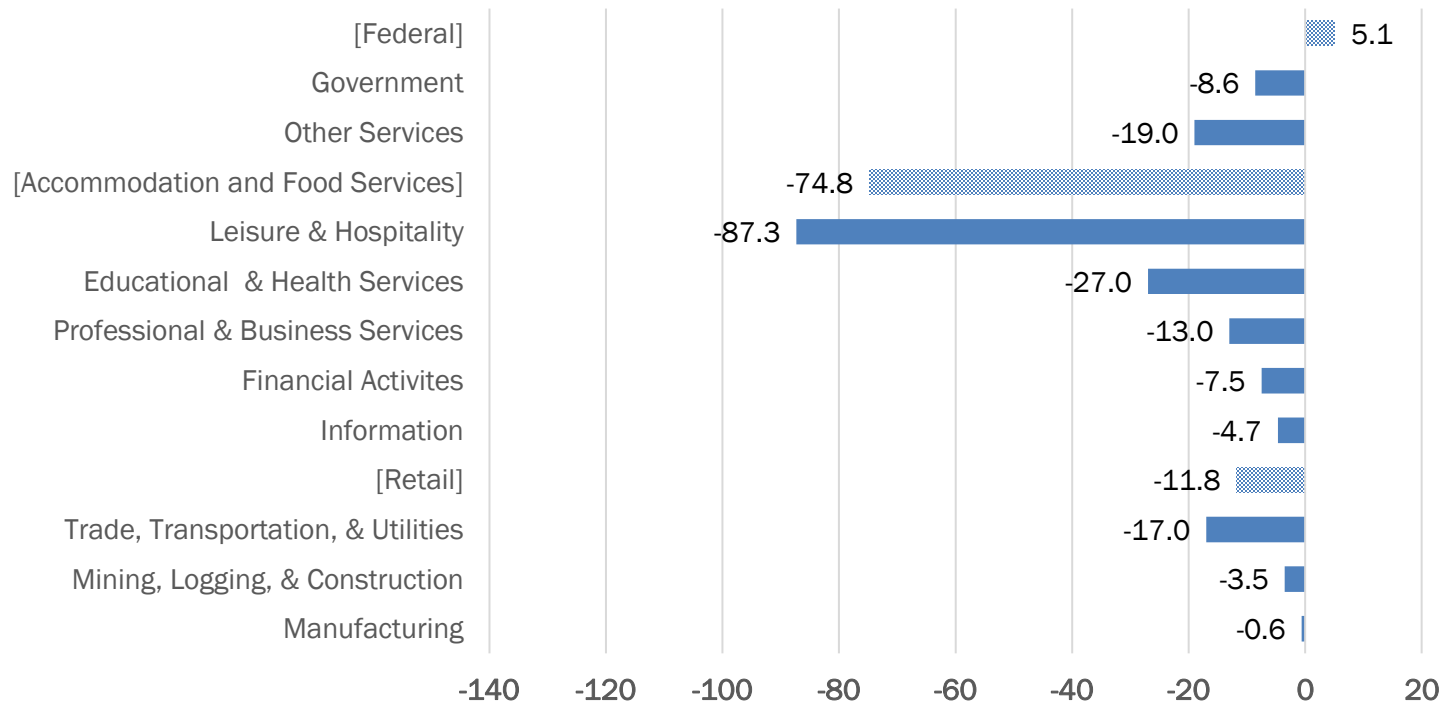
Revised BLS data show the region lost 370,900 jobs between March and April of 2020. As of March 2021, 182,700 jobs have been added during our partial reopening.

# Unemployment Rate Washington MSA and US



Our unemployment rate nearly tripled with the onset of the pandemic but was still nearly 5 points below the nation. With partial reopening, the national and local rates did converge in late 2020, but the local rate so far in 2021 is again below the national rate.

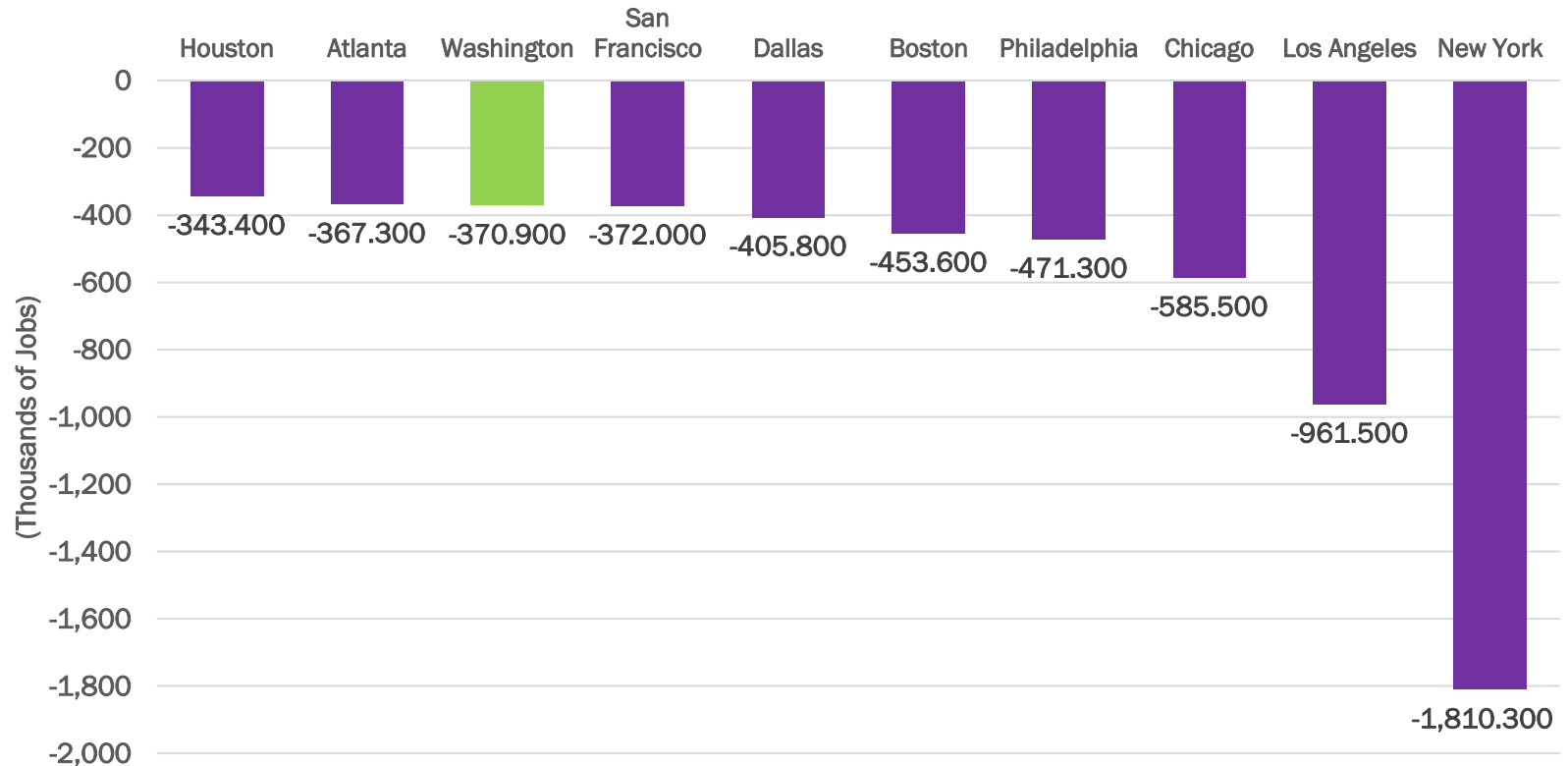
# Over-the-year Job Change By Sector March 2021 vs March 2020 Washington MSA (Thousands)



The most-current employment data shows job losses to be in hospitality, retail, and several service industry sectors.

# Non-Farm Job Loss March to April 2020 In 10 Largest MSAs

(Source: Bureau of Labor Statistics, Revised Data 3/21)

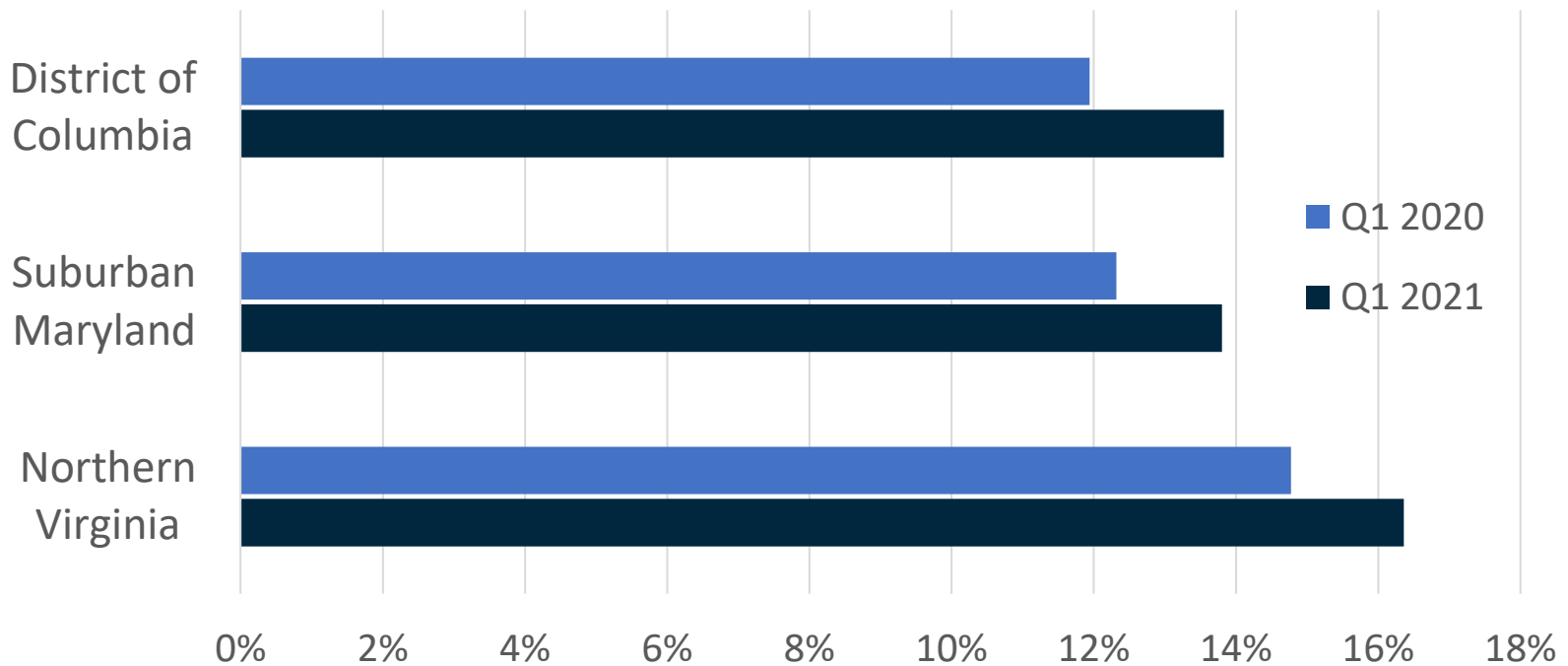


Our initial job losses were among the lowest when compared to many of our peer regions. New York and Los Angeles experienced the most severe losses.



# Change in Office Vacancy Rates Q1 2020 vs Q1 2021

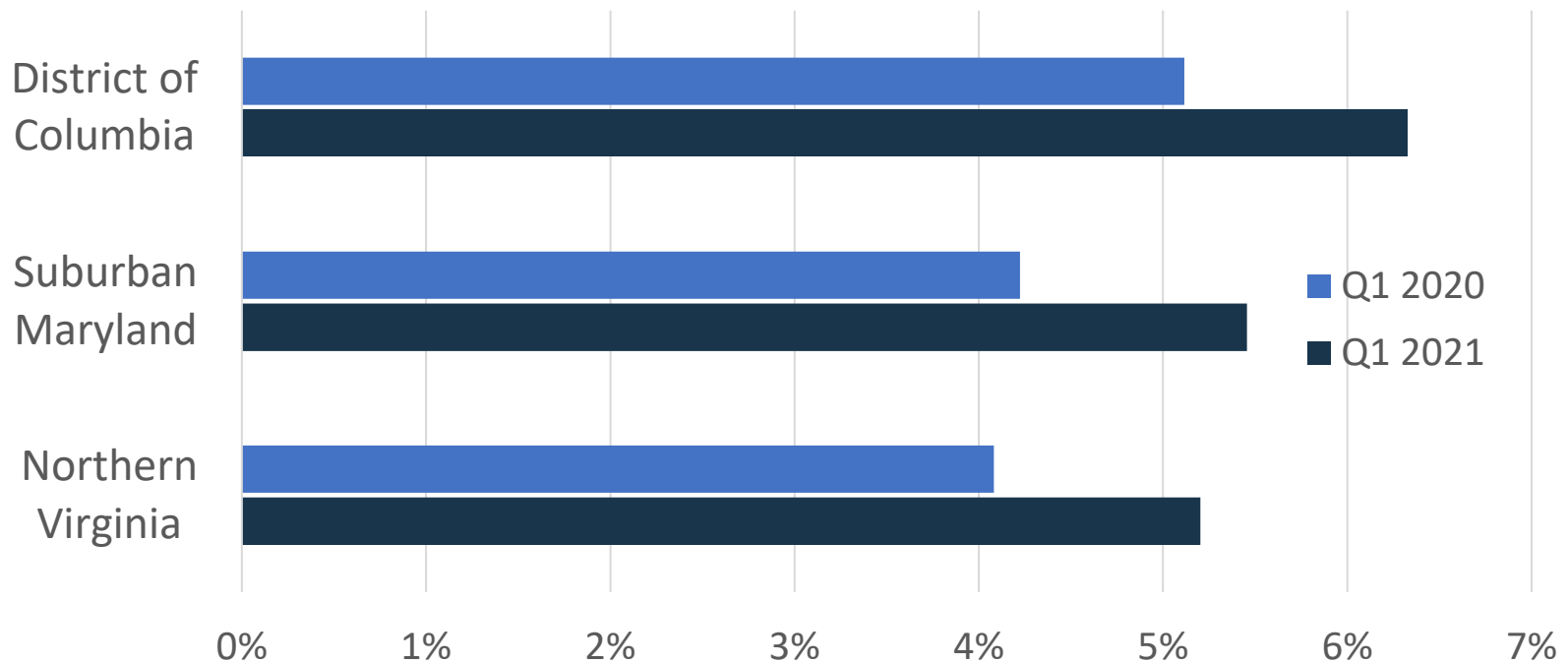
(Source: CoStar)



Office vacancy rates have increased slightly throughout the region. Office leases are for longer-term periods and will be monitored for changes.

# Change in Retail Vacancy Rates Q1 2020 vs Q1 2021

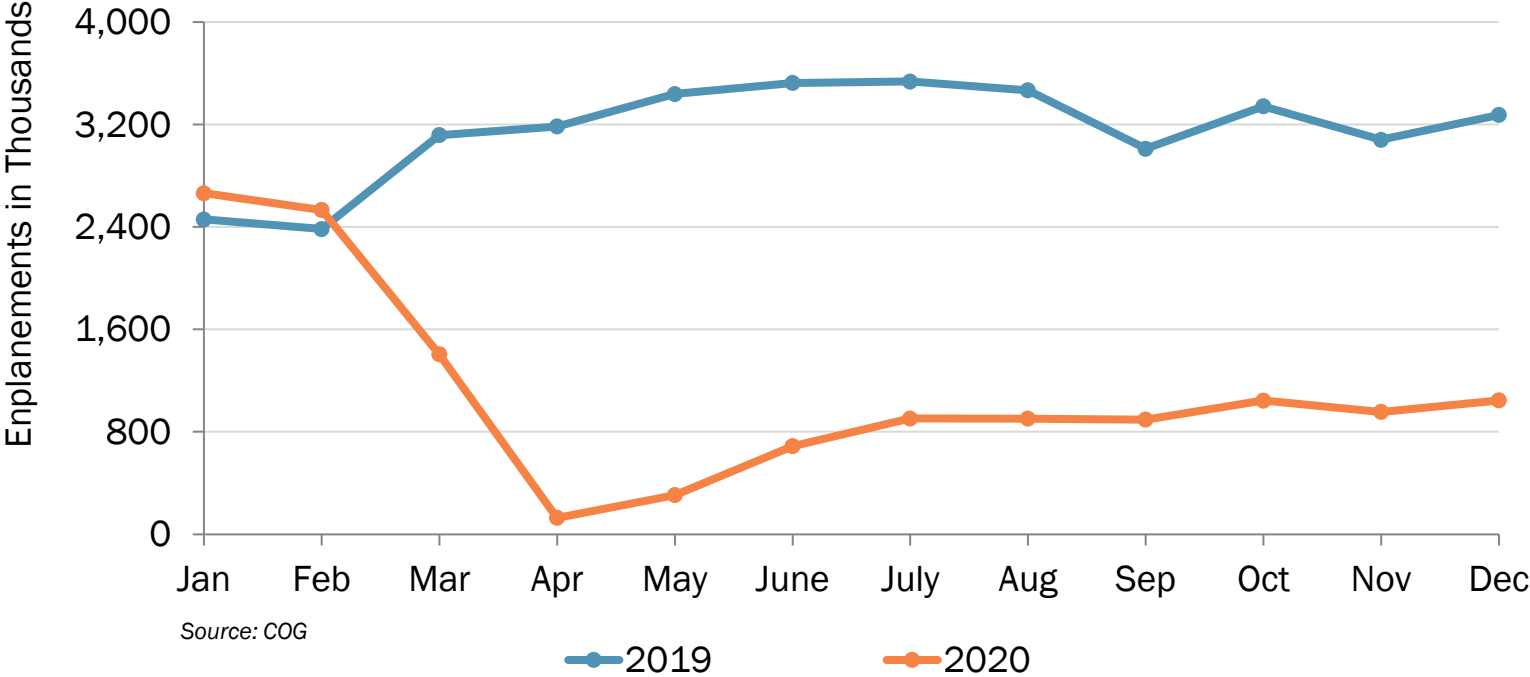
(Source: CoStar)



Retail vacancy rates have also increased slightly throughout the region. Retail space is very susceptible to COVID-related closures and will also be monitored.

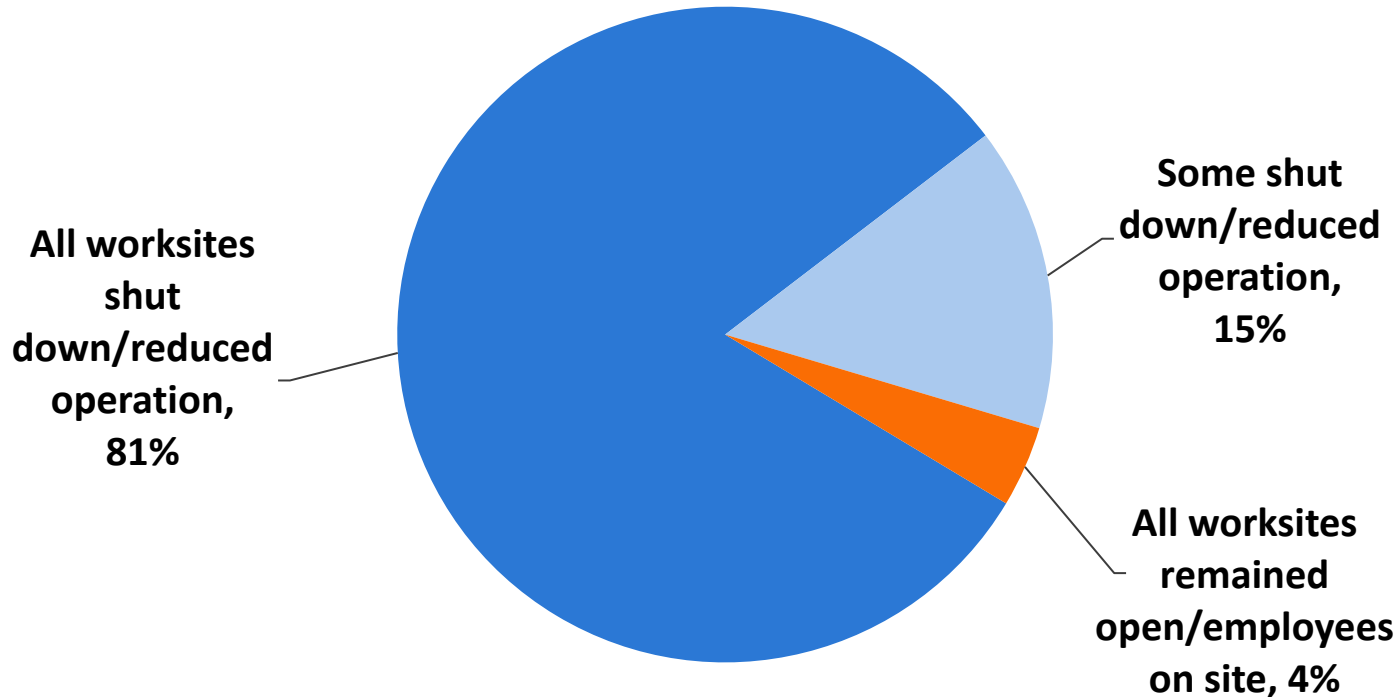
# Air Travel

### 2019 and 2020 Monthly Enplanements at Washington/Baltimore Regional Airports



Air travel has recovered somewhat at the region’s three major airports since April 2020 but remains much lower than 2019.

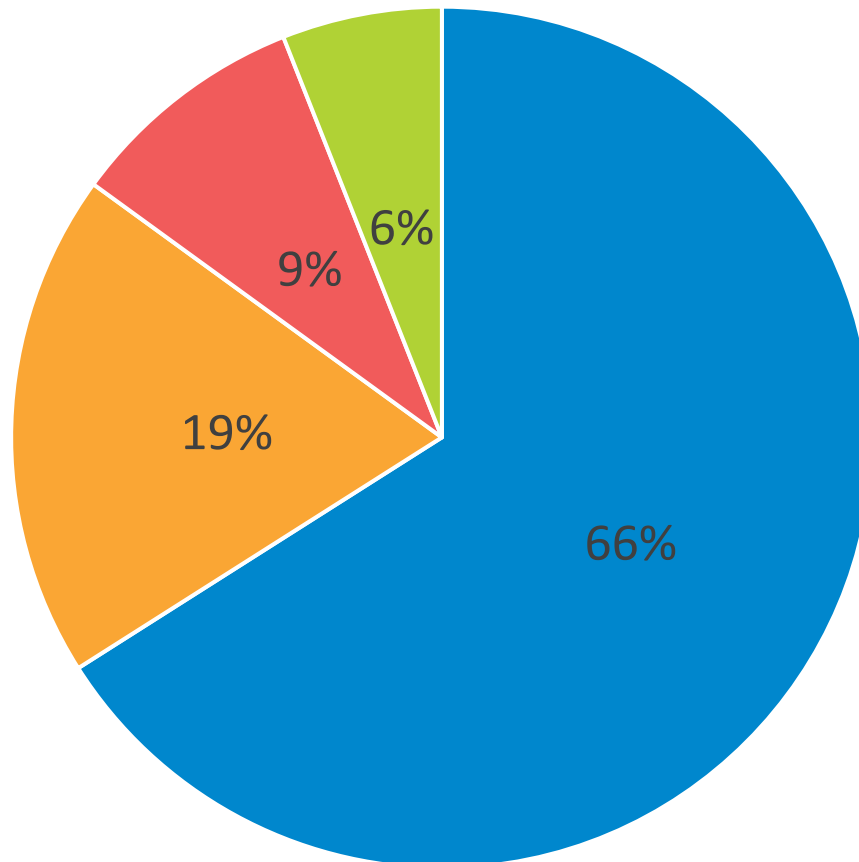
# Worksite Operations



Source: Commuter Connections 2020 Employer Telework Survey

96% of Worksites Shut Down or Reduced On-site Operation Either Completely (81%) or Partially (15%) Since Coronavirus Pandemic Began

# Change in Daily Travel Since March 2020



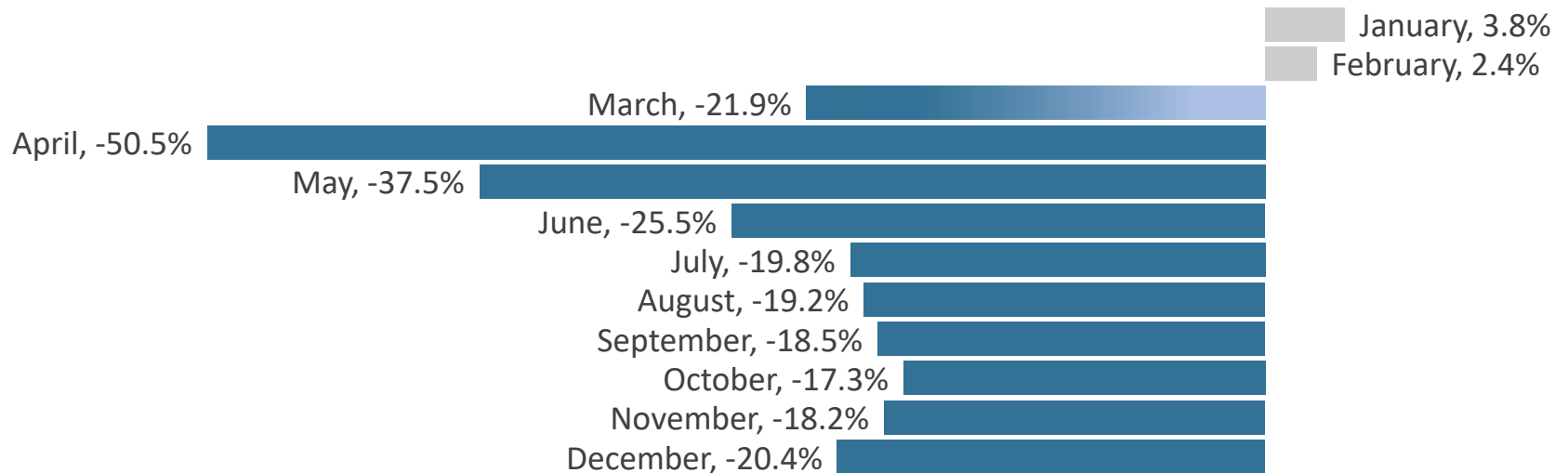
■ A lot ■ Some ■ A little ■ None

Two-thirds of respondents report their daily travel habits have changed a lot since the beginning of the COVID-19 pandemic.

*Source: COG/TPB "2020 Voices of the Region Survey," 2021.*

# Roadway Traffic Volumes: Region

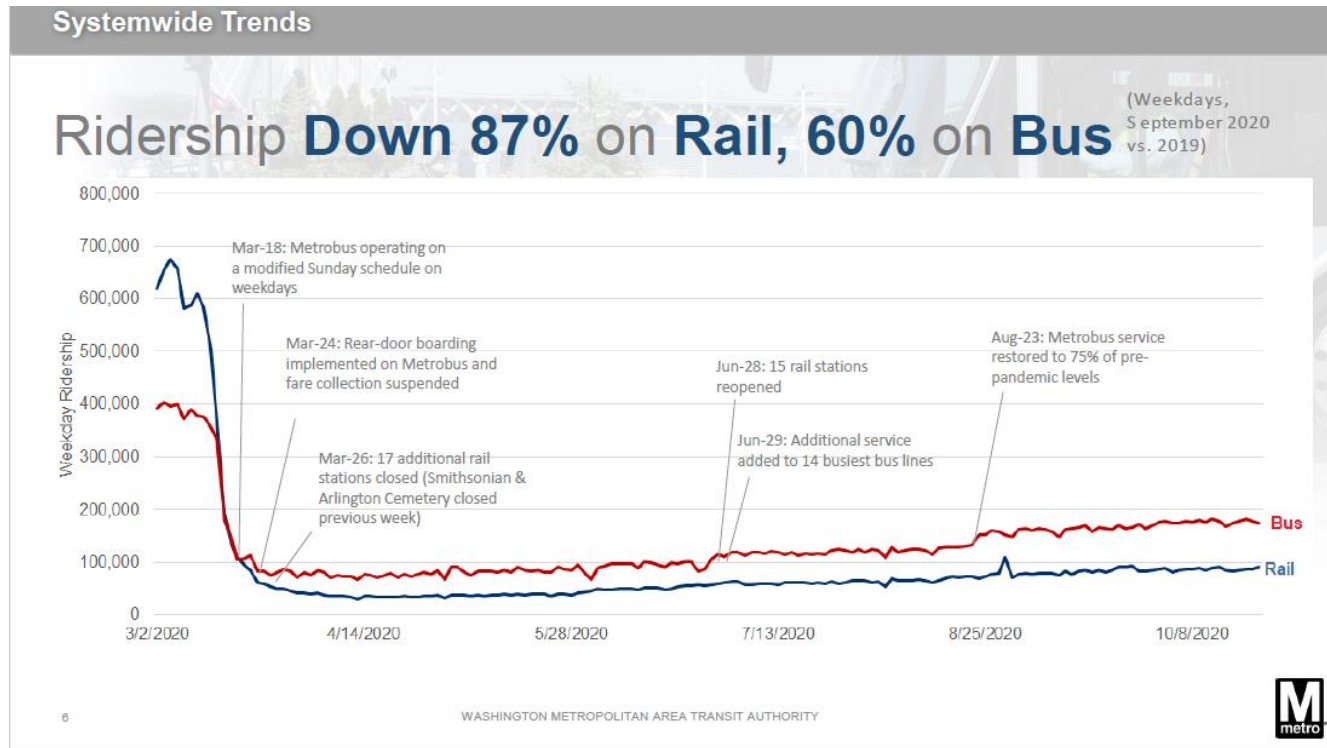
TPB Region - Monthly Average Percent Change from Equivalent 2019 Month



Source: COG/TPB

Regional traffic volumes, which in April 2020 had dipped below 50% of 2019 volumes, had recovered to over 80% of 2019 volumes by July, and continued a slow recovery through October 2020. Volumes, however, decreased once again region-wide in November and again in December 2020.

# Metrorail and Metrobus Ridership



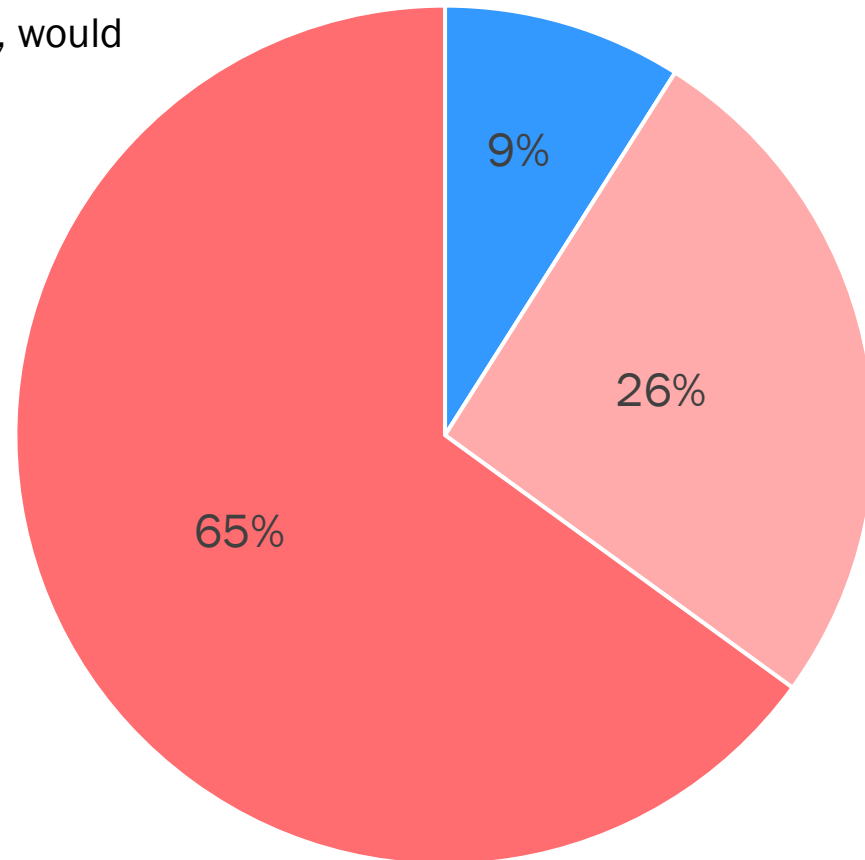
WMATA Regional Bus Ridership Workshop, November 17, 2020. COVID Ridership Trends, Diane Patterson.

Ridership decreased as a result of both reduced demand and reduced transit capacity, underscoring the complex interrelationship of supply and demand on transit. This contrasts to roadway volume decreases, which resulted from demand reductions.

# Preferences of Current Teleworkers

If given the choice to return to a work location once the COVID-19 pandemic is over, would you prefer to...?

- Return to work location full-time
- Telework full-time
- Telework some days and commute to work location some days



Source: COG/TPB "2020 Voices of the Region Survey," 2021.



# Considerations

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- How will teleworking influence land use development and travel patterns in the region?
- How will housing demand, including location, be influenced?
- Will the fundamental social and economic structure of the region's economy undergo change?
- What transportation investments are needed to meet demands of a new normal AND meet ongoing demands of essential workers and elements of the region that will go unchanged?
- How does the region balance the critical need to respond to new short-term realities after the pandemic while continuing to make long-term land use and transportation decisions for our communities?

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