METRO
BOARD OF DIRECTORS
OCT 13, 2011

COMMUTING IN THE 21ST CENTURY

Alan E. Pisarski

WHERE WE'RE AT

SOME BASICS ABOUT CURRENT NATIONAL COMMUTING BEHAVIOR

COMMUTING & TRANSPORTATION

ALL TRANSPORT	COMMUTING'S ROLE

ALL TRANSPORT

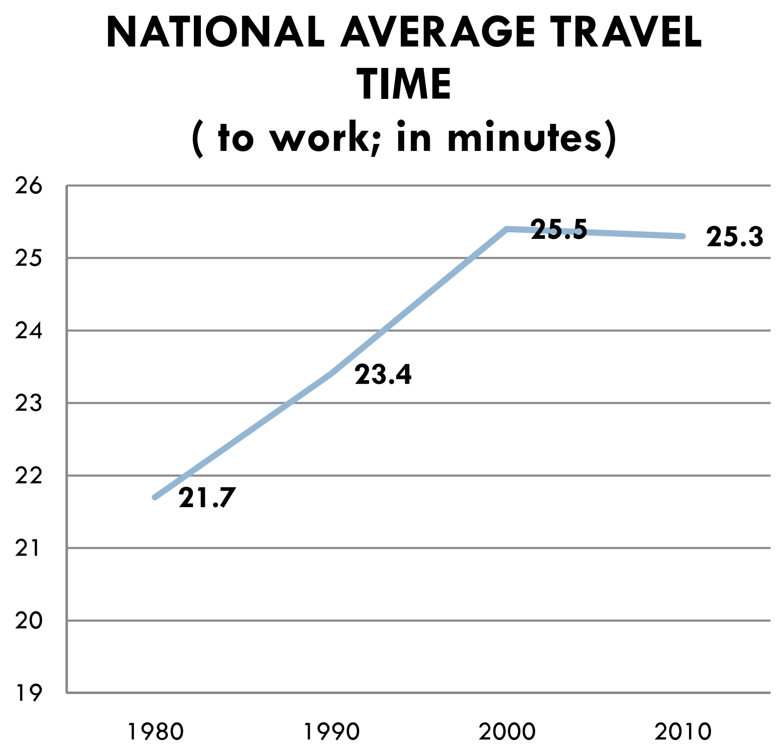
- COMMUTING
- OTHER LOCAL TRAVEL
- TOURISM
- SERVICE VEHICLES
- PUBLIC VEHICLES
- URBAN GOODS MOVEMENT
- THRU PASSENGER TRAVEL
- THRU FREIGHT TRAVEL

COMMUTING'S ROLE

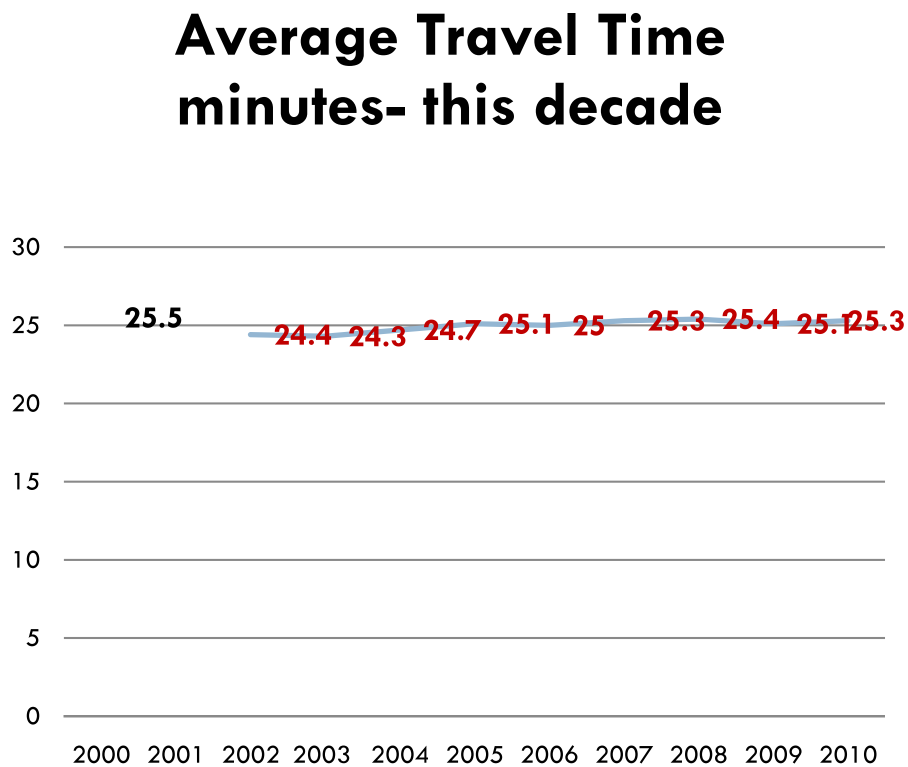
- a small and declining share of travel
- But still an important recurring activity and key to peak hour congestion
- Home/work are anchors of many other activities
- The main source of the public's transportation frustrations

AVERAGE TRAVEL TIMES HAVEN'T BUDGED

Long term trend at stability



Short term -- No real effects



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Mode Shares to Work are Stable

	1990 decen	2000 decen	2010 ACS
WORKERS	100%	100%	100%
DRIVE ALONE	73%	76%	77%
CARPOOL	13%	11%	10%
TRANSIT	5%	5%	5%
TAXI	0%	0%	0%
BICYCLE	0%	0%	0%
WALKED	4%	3%	3%
OTHER	1%	1%	1%
WORKED AT HOME	3%	3%	4%

Carpoolers and Transit users look a lot alike
The 20% Test for Top Metros

Top Metropolitan Statistical Areas	Total Workers	% Drove Alone	% Carpool	% Transit	% Bike or Walk	% Other	% Work at Home
New York-Northern New Jersey-Long Island, Metro Area	8,719,316	50.4%	7.4%	30.3%	6.5%	1.7%	3.7%
Los Angeles-Long Beach-Santa Ana, Metro Area	5,816,255	73.5%	**11.4%**	**6.1%**	3.4%	1.3%	4.4%
Chicago-Naperville-Joliet, Metro Area	4,422,844	70.9%	9.1%	11.5%	3.6%	1.1%	3.8%
Dallas-Fort Worth-Arlington, Metro Area	2,945,976	80.1%	**11.4%**	**1.6%**	1.5%	1.3%	4.0%
Washington-Arlington-Alexandria, Metro Area	**2,795,375**	**66.2%**	**11.1%**	**13.9%**	**3.5%**	**0.9%**	**4.4%**
Philadelphia-Camden-Wilmington, Metro Area	2,751,491	73.3%	**8.9%**	**9.2%**	4.3%	0.8%	3.5%
Houston-Sugar Land-Baytown, Metro Area	2,581,559	78.1%	**12.6%**	**2.7%**	1.8%	1.6%	3.2%
Atlanta-Sandy Springs-Marietta, Metro Area	2,494,475	77.5%	**10.9%**	**3.6%**	1.5%	1.5%	5.1%
Miami-Fort Lauderdale-Pompano Beach, Metro Area	2,479,021	78.4%	**10.1%**	**3.8%**	2.2%	1.5%	4.0%
Boston-Cambridge-Quincy, Metro Area	2,277,958	69.4%	8.1%	11.9%	5.7%	0.9%	4.0%
San Francisco-Oakland-Fremont, Metro Area	2,056,454	62.3%	10.4%	14.5%	5.7%	1.5%	5.5%

Wash COG

Source: American Community Survey, 2005-2009 5 year data set

A LOT OF "GOOD CITIZENS" BUT NOT A LOT OF "BRAND LOYALTY"

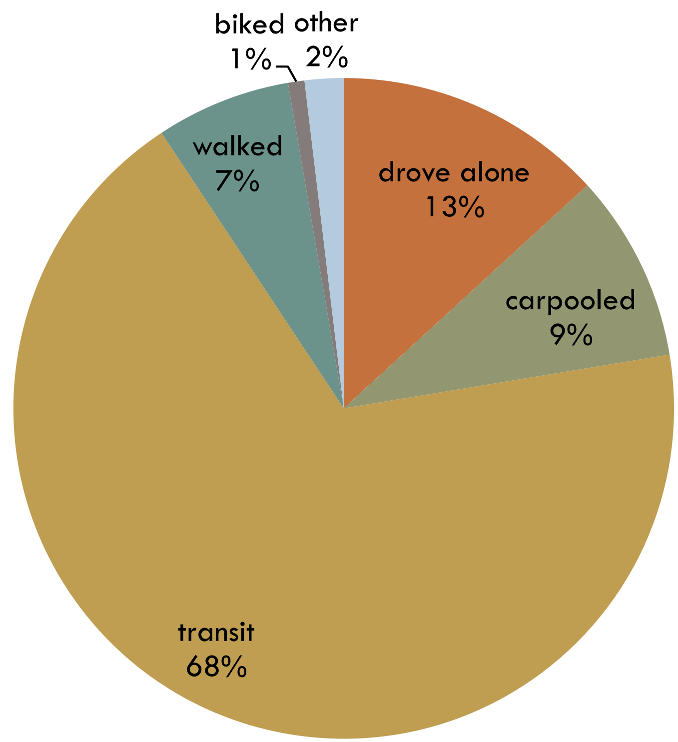
TRANSIT SHARE:

ACS "Usually" use 5%

NHTS "Usually" Use 5.1%

NHTS Actually use 3.5%

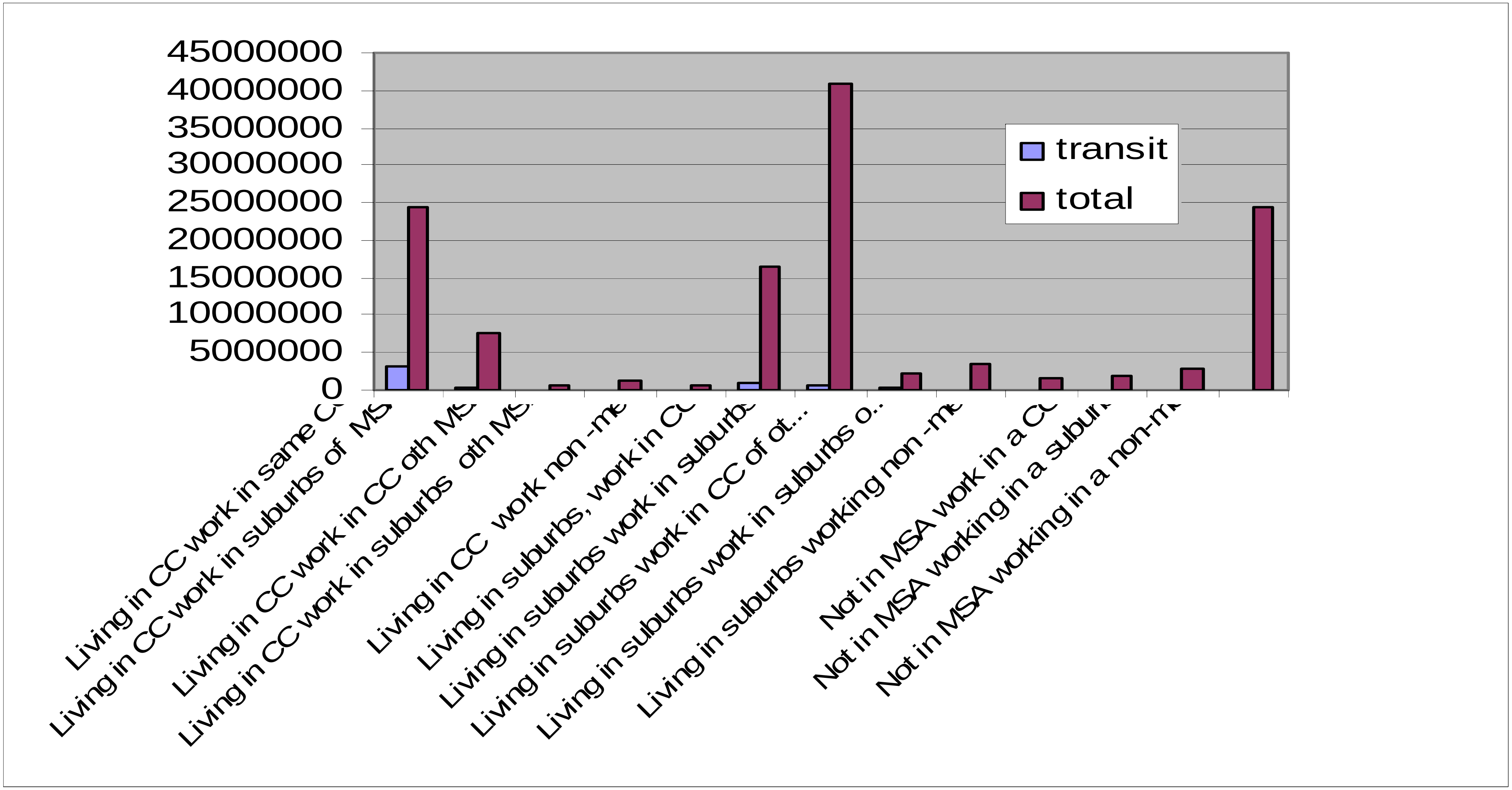
OF THOSE WHO SAID THEY "USUALLY" USED TRANSIT; BUT YESTERDAY THEY ACTUALLY USED



GAINS – LOSSES IN THE JOB DECLINE

- **Decline in workers 2009 to 2010 – 1.65 million = 1.2% of workforce**
- **All modes declined except Work-at-home**
- Drove Alone decline .6% (half)
- **Transit decline 2.2% (almost double)**
- Bike/walk decline 4.3-4.5%
- **Carpool biggest loser 4.7%; big pools ok (?)**

National Commuting Flows – 2000



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WHERE WE'RE GOING

THE SEARCH FOR SKILLED WORKERS

The Future Is More Stable Than The Past

- **LOW POPULATION GROWTH**
- **LOW HOUSEHOLD GROWTH**
- ***LOW LABOR FORCE GROWTH***
- **LOW DOMESTIC MIGRATION TRENDS**
- **SATURATION OF DRIVER'S LICENSES**
- **SATURATION OF CAR OWNERSHIP**

Given all this stability:

- Need a focus on current needs – not impending growth
- The "watch-out– here they come" school of planning won't work anymore
- A new context for planning: "Getting the Economy out of the mud!"
- The mobility issues we face are eminently solvable.

Keep asking this question:

"IS IT A NEW TREND OR JUST THE ECONOMY?"

3 Trends will define the future

1. **Replacing the Baby-boomers – where will our skilled workforce come from?**

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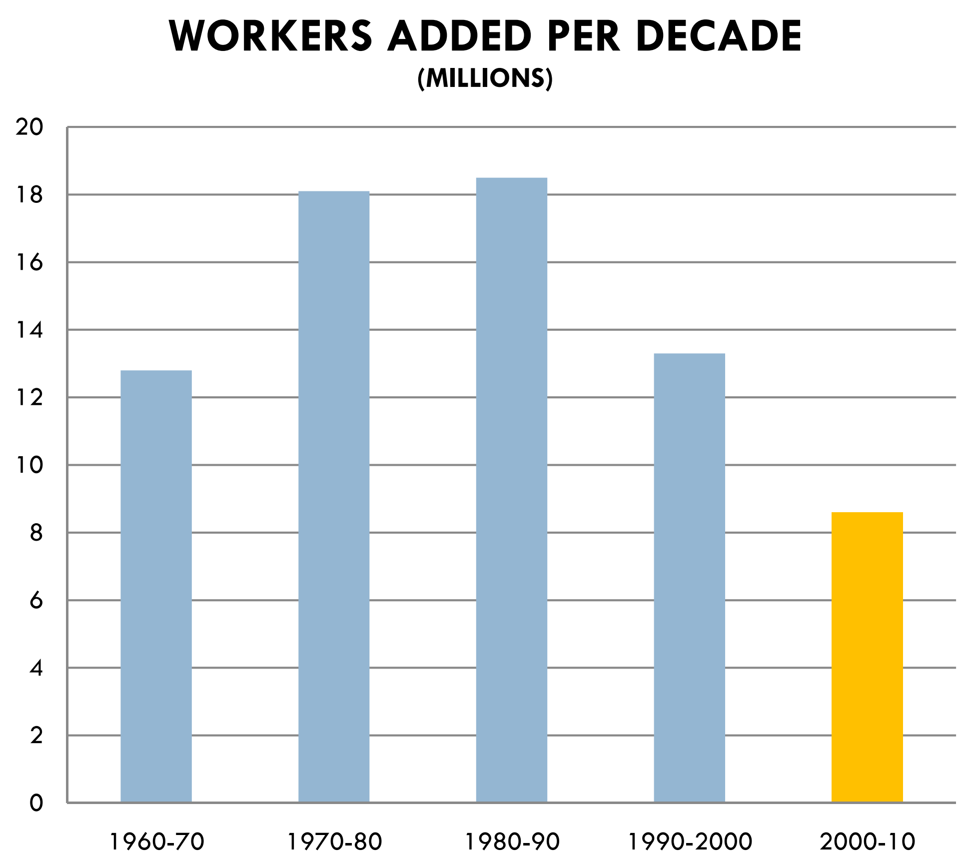
3 Trends will define the future

1. Replacing the Baby-boomers – where will our skilled workforce come from?
2. Expanding metro areas – the doughnut metro – with focus on the suburbs
3. An affluent time-focused society – $50/hour and tripling of average value of goods moved (see my HR testimony 1/24/2007 T&I)

VALUE OF TIME VS VEHICLE COST

- IN EARLY INTERSTATE ERA TRAVEL COST WAS MAIN DRIVER OF DECISIONS
- THE VALUE OF TIME WAS THE DRIVER OF BEHAVIOR IN THE 80'S AND 90'S
- THE PAST DECADE HAS BECOME MORE COST ORIENTED AGAIN
- VALUE OF TIME WILL BE ULTIMATE FACTOR AS SOCIETY PROSPERS AGAIN

END OF THE BOOM



Source: Commuting in America III and BLS

1980-90

- 18.5 Million

1990-2000

- 13.3 Million

2000-2010

- 8.6 Million (?)

- **Our problem may be too few commuters not too many!**

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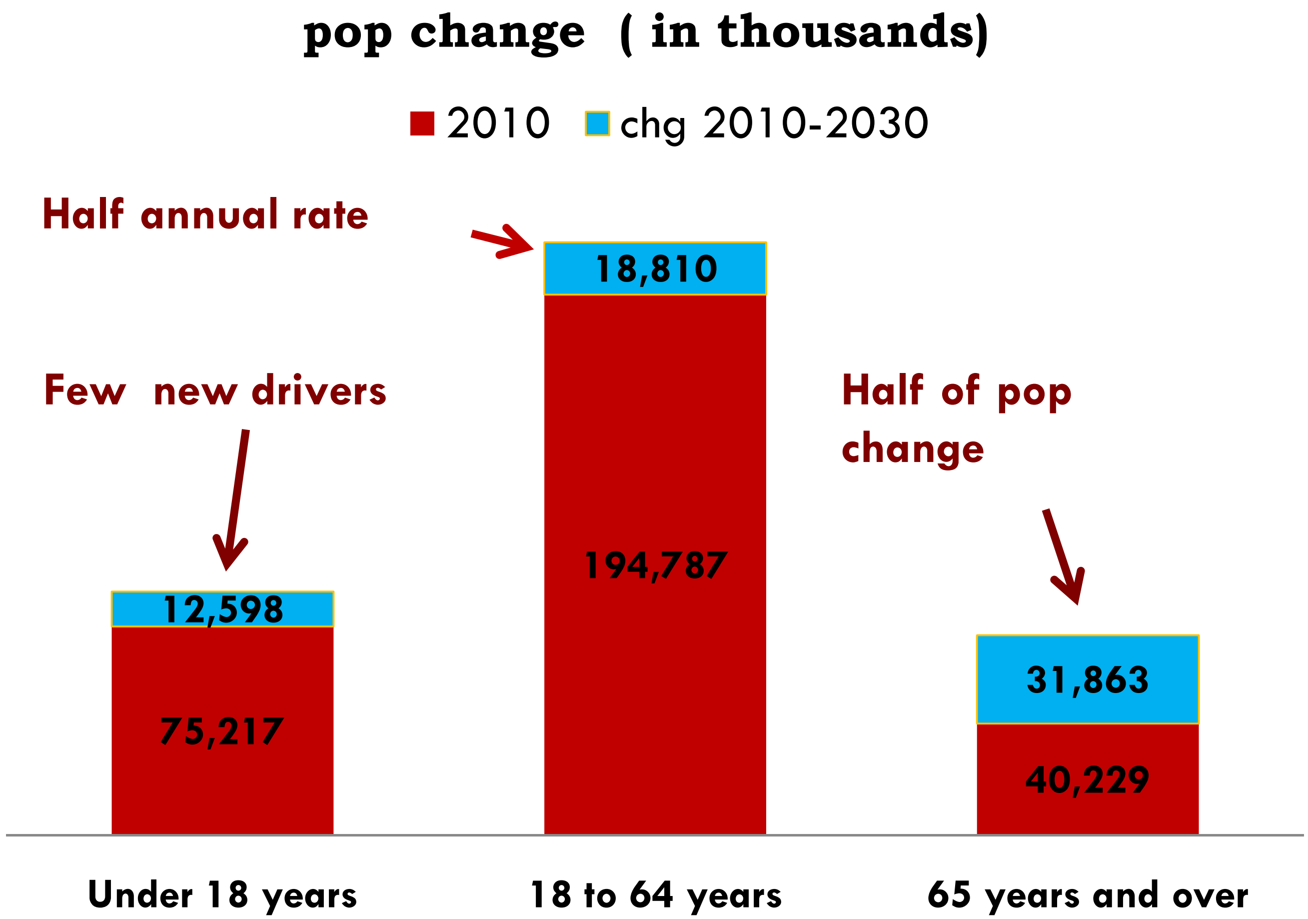
Not Much Growth and in the wrong places to support economy

We added +/- 20 million to work force age group in 2000-2010 decade.

We add fewer in the next two decades!



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Who and What Will Support The Economy?

- Keep older workers at work
- Even more women at work
- More immigrants
- More multi-tasking
- More variable work schedules
- More Productivity
- More Specialization
- More skilled workers
- More Competitive in World Markets

ENHANCED MOBILITY SUPPORTS ALL OF THESE

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A New Role For Older Workers

A DOUBLING OF WORKERS OVER 65 BY 2030

15% of over 65 are now working ; up from 11% in 1990

The Future issue – Access to Workers

The area flunks many of these tests

- Broaden Market Opportunities
  - Access to Jobs/Workers
  - Access to suppliers
  - Access to markets/customers/clients/patients
- Improve
  - Center city access to suburban jobs
  - Rural access to suburban jobs
  - Older/Retirees access to old/new jobs
- Recognize more time-efficient long distance travel as central to region's health
- Support Employer Flexibility in time etc
- Stronger Private Sector roles utilizing technological strengths of the region

COMMUTERS LEAVING HOME COUNTY TO WORK – WE LEAD THE NATION

1990

- U.S. 23.9%

2000

- U.S. 26.7%

2010

- U.S. 27.4%
- Va. 51.3% (#1)
- Md. 47.0% (#2)
- Wash Metro 51%

(Only 1/3 of Arl res work in Arl)

WHY?

- SPRAWL?
- ACCESS?
- OCCUPATIONS?
- GOVERNMENT?
- SKILLS MIX?
- CHOICE?

THE CASE FOR "DIFFERENT" HERE

- NO FACTORIES; NO FREIGHT (PAPER)
- BIG WHITE MARBLE BUILDINGS NOT LEAVING
- LOWER INCOME FEDS FORCED TO REGION'S EDGES
- HIGH IMMIGRANT EDUCATION LEVELS (1.89)
- 7 OF 10 RICHEST COUNTIES ARE HERE
- TRANSIT DOES FAR BETTER THAN ONE WOULD EXPECT GIVEN ALL THOSE FACTORS

THE CASE FOR "NO DIFFERENT" HERE

- RELATIVELY STABLE GROWTH
- STANDARD SUBURBANIZATION OF JOBS, WORKERS, POPULATION
- SUBSTANTIAL IMMIGRANT INFLOWS
- SKILLS MISMATCHES
- HYPER SUBURB TO SUBURB WORK FLOWS

WHAT WILL THE FUTURE COMMUTING WORLD LOOK LIKE?

MORE JOB SPECIALIZATION	✓ More
MORE AFFLUENCE	✓ More
LOWER DENSITY	✓ More
AUTO AFFORDABILITY	✓ More
AUTO PRONE AGE GROUPS	✓ More
AUTO TRIP PURPOSE	✓ More
TRIP DISPERSAL	✓ More
HIGHER FREIGHT VALUE	✓ More
MORE TIME SENSITIVITY	✓ More
DEMOCRATIZATION OF MOBILITY	✓ More

THIS IS THE WAY THE PROCESS PROGRESSES

1. CREDIBILITY
2. VISION
3. PLAN
4. **FINANCE**

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THE BASIS FOR CREDIBILITY

The public has no obligation to live in ways that make it convenient for government to serve them

AEP

- **TRANSPARENCY**
- **PRODUCTIVITY**
- **FISCAL RESPONSIBILITY**
- **A SYSTEM THAT WORKS**
- **APPROPRIATE MODESTY ABOUT EXPANSION**
- **RECOGNIZE CONSUMER SOVERIGNTY**

WHAT IS THE GOAL?

My goal for transportation is to reduce the effects of distance as an inhibiting force in our society's ability to realize its economic and social aspirations!

What's yours?

Yours could be:

I asked a friend – a very knowledgeable friend – and the answer was:

"Create a culture of duty to the riders, taxpayers and residents, founded on safety, honesty, transparency, quality, and value for the taxpayer dollar!"

I can't say it better than that. Alan E. Pisarski

THANK YOU!

Alan E. Pisarski

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