What We Are Learning from COVID-19 and How it Could Impact Transportation Planning in the San Diego Region

Transportation Committee, Regional Planning Committee, and Borders Committee
July 17, 2020

Regional Plan and Transportation Projects: State and Federal Laws

- Climate change and air quality: greenhouse gas emissions, smog, localized air pollution
- Social equity: compliance with federal civil rights requirements (Title VI) and environmental justice considerations
- SB 743: shift to vehicle miles traveled to evaluate impacts of transportation projects
Learning from the COVID-19 Crisis: Re-envisioning Transportation Investments

Economic Crises in the 21st Century

- September 11 Attacks
- "Dot-Com" Bubble
- Housing Market Bubble
- Auto Crisis
- Sub-Prime Mortgage Crisis
- Global Financial Crisis
- Corona Virus
- COVID-19 Recession
COVID-19 Impacts Many Aspects of the Lives and Communities in our Region

All impacts as a result:

- Local Economy
- Small Business
- Restaurants/Food & Beverage
- Tourism & Entertainment
- Unemployment
- Race & Ethnicity
- Mental Health
- Transportation
- Communities
- Schools
- Families
- Retail
- Hospitality
- Small Business
- Sales Tax Revenue

Significant Impact on Taxable Sales

San Diego Regional Economy

San Diego Gross Regional Product

<table>
<thead>
<tr>
<th>Year</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growth</td>
<td>4.1%</td>
<td>2.6%</td>
<td>2.6%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Source: B.E.A., SANDAG estimates</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Visits to restaurants, cafes, shopping centers, theme parks, museums, libraries, and movie theaters

Source: Google mobility report

Significant Impact on Taxable Sales

Source: SANDAG
Impact of COVID-19 Pandemic and Economic Crisis

Unemployment

Population and Employment in the San Diego Region

- Peak (Jul-07)
- Trough (Mar-10)
- Recovery (Nov-13)
- Great Recession

Source: US Bureau of Labor Statistics (BLS), All Employees: Total Nonfarm in San Diego-Carlsbad, CA (MSA)
Impact of COVID-19 on Employment in the San Diego Region

March 7, 2020
3.3% Avg

May 9, 2020
25.0% Avg

June 27, 2020
14.3% Avg

Unemployment Estimates
Number of Unemployed and Rate

Source: Applied Geographic Solutions, Inc., Thousand Oaks, California, Weekly Release July 6, 2020
Impact of COVID-19 Pandemic and Economic Crisis

Economic Sectors

San Diego Region Employment by Key Economic Sector

COVID-19 Impacts

High Impact
Tourism
Retail
Transportation

Moderate Impact
Healthcare
Education
Government

Low Impact
Innovation
Military
Finance, Insurance, Real Estate
Manufacturing
Construction
Transportation

31% 32% 37%
Employment Sector Forecast

- **Supporting Sectors**
  - Health Care
  - Education
  - Government

- **Driving Sectors**
  - Tourism
  - Innovation
  - Military

- **Traditional Sectors**
  - Retail/Wholesale Trade
  - Professional
  - Construction
  - Manufacturing
  - Transportation & Utilities

This forecast assumes about a loss of 100,000 jobs in 2020 resulting in 9% unemployment rate.

COVID-19 Impacts to Local Industries

- **General Retail Down 35%**
- **Transportation Down 35-40%**
- **Food and Beverage Down 25-45%**
- **Construction Materials Up 10-15%**

Source: SafeGraph COVID-19 Response Dataset - Weekly Patterns, v2
### High-Contact-Intensity Occupations

337,570 High Contact-Intensity Jobs

- **Healthcare – Moderate Job Loss**
  - Most considered “essential workers” job loss in non-essential healthcare, e.g., dentistry, elective surgeries

- **Education – Moderate Job Loss**
  - Technology like Zoom, enables remote learning and allows for social distancing

- **Transportation – High Job Loss**
  - Airline workers, taxi drivers, chauffeurs, delivery drivers and other occupations in transportation are significantly impacted

- **Food & Beverage Services – High Job Loss**
  - Restaurant and bar closures, catering companies, social events canceled, significantly impact occupations in this sector

- **Personal Care and Services – High Job Loss**
  - Non-essential services requiring close proximity like fitness workers, childcare, nannies, barber shops, hair dressers, manicurists ordered to curtail operations.

---

### San Diego Region Employment by Race and Ethnicity and Frontline Workers

<table>
<thead>
<tr>
<th>Share of ethnic group in selected industries relative to their share of all employed residents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Other (not frontline or high contact)</strong></td>
</tr>
<tr>
<td><strong>Personal Care</strong></td>
</tr>
<tr>
<td><strong>Food Service</strong></td>
</tr>
<tr>
<td><strong>Retail</strong></td>
</tr>
<tr>
<td><strong>Grocery, Convenience, and Drug Stores</strong></td>
</tr>
<tr>
<td><strong>Child Care and Social Services</strong></td>
</tr>
<tr>
<td><strong>Health Care</strong></td>
</tr>
<tr>
<td><strong>Other frontline</strong></td>
</tr>
</tbody>
</table>

- **Essential – Frontline**
  - Asian over-represented
  - Hispanic over-represented
  - Black over-represented

- **Non-essential**
  - Hispanic over-represented

Impact of COVID-19 Pandemic and Economic Crisis

Small Business

Impacts to Small Business in San Diego Region

<table>
<thead>
<tr>
<th>Change in Revenue in the Last Week</th>
<th>Change in Paid Employees in the Last Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>76%</td>
<td>72%</td>
</tr>
<tr>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>0%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Small Business Pulse Survey, Week Ending June 27, 2020
COVID-19 Impact on Small Business in San Diego Region

**Overall, how has this business been affected by the COVID-19 pandemic?**

- Little to No Effect: 15%
- Large & Moderate Positive Effect: 3%
- Large & Moderate Negative Effect: 82%

**Since March 13, 2020, has this business requested financial assistance from any of the following sources?** Select all that apply:

- Paycheck Protection Program: 73%
- Economic Injury Disaster Loans: 25%
- Not requested financial assistance from any source since March 13, 2020: 20%

*Source: U.S. Census Small Business Pulse Survey, Week Ending June 27, 2020*

Impact of COVID-19 Pandemic and Economic Crisis

**Taxable Sales**

*SANDAG*
Impact of Recessions on Taxable Sales

Calendar Year

Billion's of Dollars in Year of Collection

- "Moderate" Recession
- "Mild" Recession
- "Severe" Recession

Down 13%

6 ½ years to recover to 2007 level

COVID-19 Recession

SANDAG

COVID-19 Impact on San Diego Region Taxable Retail Sales

Pre-COVID-19
April
May

Business To Business
Restaurants
Other Retail
Auto Repairs and Sales
Construction
Department Stores
Service Stations
Apparel Stores
Food Market and Liquor Stores

Billions of Dollars

SANDAG
Impact of COVID-19 Pandemic and Economic Crisis

Communities

Communities Most Impacted as of May 30
An assessment of communities most impacted by both COVID-19 cases and unemployment

- 91910 (Chula Vista N)
- 91911 (Chula Vista S)
- 91917 (Dulzura)
- 91932 (Imperial Beach)
- 91950 (National City)
- 91977 (Spring Valley)
- 91978 (Rancho San Diego)
- 92020 (El Cajon)
- 92021 (El Cajon)
- 92102 (Golden Hill)
- 92105 (City Heights)
- 92113 (Logan Heights)
- 92114 (Encanto)
- 92115 (College)
- 92139 (Paradise Hills)
- 92154 (Nestor)
- 92173 (San Ysidro)
COVID-19 Cases and Estimated Unemployment by Race and Ethnicity

Impact of COVID-19 and Unemployment by Race and Ethnicity in the San Diego Region

Source: SANDAG Annual Estimates 2019; Applied Geographic Solutions, Inc., Thousand Oaks, California; County of San Diego, Health and Human Services Agency
# Impact of COVID-19 Pandemic and Economic Crisis

## Recovery

SANDAG is monitoring key variables to determine how far each one is from returning back to normal (pre-COVID-19 levels).

### Unemployment

<table>
<thead>
<tr>
<th>Pre-COVID</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>3%</td>
<td>3%</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### VMT

<table>
<thead>
<tr>
<th>Pre-COVID</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>101%</td>
<td>93%</td>
<td>70%</td>
<td>54%</td>
<td>54%</td>
</tr>
</tbody>
</table>

### Overall Mobility Data

<table>
<thead>
<tr>
<th>Retail and Recreation</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>103%</td>
<td>98%</td>
<td>71%</td>
<td>54%</td>
<td>49%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grocery and Drugstore</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>102%</td>
<td>108%</td>
<td>102%</td>
<td>79%</td>
<td>73%</td>
</tr>
</tbody>
</table>

### Foot traffic by type of business

<table>
<thead>
<tr>
<th>Supermarket</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>123%</td>
<td>92%</td>
<td>75%</td>
<td>68%</td>
<td>66%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Apparel Stores</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>96%</td>
<td>81%</td>
<td>35%</td>
<td>23%</td>
<td>22%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Car Dealers</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>93%</td>
<td>84%</td>
<td>55%</td>
<td>48%</td>
<td>44%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building Material and Supply</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>95%</td>
<td>93%</td>
<td>72%</td>
<td>75%</td>
<td>54%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Garden and Equipment</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>100%</td>
<td>78%</td>
<td>61%</td>
<td>71%</td>
<td>76%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal Care Services</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>88%</td>
<td>76%</td>
<td>49%</td>
<td>40%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Golf Courses and Country Clubs</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>90%</td>
<td>74%</td>
<td>41%</td>
<td>30%</td>
<td>32%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fitness and Rec Sports Centers</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Airport</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Restaurants</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hotels</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Others</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

### Source

SANDAG based on Applied Geographic Solutions, Inc., Thousand Oaks, California; Caltrans PeMS, Google mobility, SafeGraph COVID-19 Response Dataset - Weekly Patterns.

---

# Tracking the Reopening

SANDAG is monitoring key variables to determine how far each one is from returning back to normal (pre-COVID-19 levels).

### Unemployment

<table>
<thead>
<tr>
<th>Pre-COVID</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>3%</td>
<td>3%</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### VMT

<table>
<thead>
<tr>
<th>Pre-COVID</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>101%</td>
<td>93%</td>
<td>70%</td>
<td>54%</td>
<td>54%</td>
</tr>
</tbody>
</table>

### Overall Mobility Data

<table>
<thead>
<tr>
<th>Retail and Recreation</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>103%</td>
<td>98%</td>
<td>71%</td>
<td>54%</td>
<td>49%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grocery and Drugstore</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>102%</td>
<td>108%</td>
<td>102%</td>
<td>79%</td>
<td>73%</td>
</tr>
</tbody>
</table>

### Foot traffic by type of business

<table>
<thead>
<tr>
<th>Supermarket</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>123%</td>
<td>92%</td>
<td>75%</td>
<td>68%</td>
<td>66%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Apparel Stores</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>96%</td>
<td>81%</td>
<td>35%</td>
<td>23%</td>
<td>22%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Car Dealers</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>93%</td>
<td>84%</td>
<td>55%</td>
<td>48%</td>
<td>44%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building Material and Supply</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>95%</td>
<td>93%</td>
<td>72%</td>
<td>75%</td>
<td>54%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Garden and Equipment</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>100%</td>
<td>78%</td>
<td>61%</td>
<td>71%</td>
<td>76%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal Care Services</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>88%</td>
<td>76%</td>
<td>49%</td>
<td>40%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Golf Courses and Country Clubs</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>90%</td>
<td>74%</td>
<td>41%</td>
<td>30%</td>
<td>32%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fitness and Rec Sports Centers</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Airport</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Restaurants</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hotels</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Others</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>98%</td>
<td>84%</td>
<td>39%</td>
<td>33%</td>
<td>39%</td>
</tr>
</tbody>
</table>

### Source

SANDAG based on Applied Geographic Solutions, Inc., Thousand Oaks, California; Caltrans PeMS, Google mobility, SafeGraph COVID-19 Response Dataset - Weekly Patterns.
Possible lasting effects beyond 2026
• Discouraged workers leaving the workforce
• Educational disruptions (students drop out rates)
• Less investment in the capital stock
• Existing capital less productive given restrictions
• Real Estate, Commercial Leasing

Shape of the recovery
• V ruled out – passed that stage
• No return to “normal” before a vaccine is available
• V long or U long depending on future closures

Impact of COVID-19 Pandemic and Economic Crisis
Transportation
Transit Ridership

2020 decrease in ridership (compared to 2019)

-120.00%
-100.00%
-80.00%
-60.00%
-40.00%
-20.00%
0.00%
-100.00%
-120.00%

March April May

Essential Workers Depend on Transit

- 20% of people who ride transit to work have no vehicles available
- 79% of people who ride transit to work travel 30 minutes or longer
- The median transit travel time is 51 minutes, which is double the travel time for people who drive to work
Travel Around the San Diego Region Survey: Public Transit

- 42% of survey respondents reported that they used transit before and after COVID-19
- 36% said they did not use transit before and will not in the future
- 18% did not use transit before but stated they would after a vaccine
- 4% said they used transit before but not after COVID-19

Freeway Travel Trends

Average Decreases in Daily Traffic Volumes at Freeway Hotspots in the San Diego Region (2019 to 2020)

<table>
<thead>
<tr>
<th></th>
<th>March - April</th>
<th>April - May</th>
<th>May - June</th>
<th>June - July</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>-27%</td>
<td>-42%</td>
<td>-33%</td>
<td>-25%</td>
</tr>
<tr>
<td></td>
<td>-43%</td>
<td>-42%</td>
<td>-31%</td>
<td>-20%</td>
</tr>
<tr>
<td></td>
<td>-50%</td>
<td>-40%</td>
<td>-23%</td>
<td>-17%</td>
</tr>
<tr>
<td></td>
<td>-33%</td>
<td>-29%</td>
<td>-21%</td>
<td>-16%</td>
</tr>
<tr>
<td></td>
<td>-31%</td>
<td>-29%</td>
<td>-20%</td>
<td>-18%</td>
</tr>
<tr>
<td></td>
<td>-33%</td>
<td>-29%</td>
<td>-18%</td>
<td></td>
</tr>
</tbody>
</table>
| Source: Performance Measurement System (PeMS), Caltrans
**Vehicle Miles Traveled**

Percent Change VMT 2019 to 2020

<table>
<thead>
<tr>
<th>Month</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>-44%</td>
</tr>
<tr>
<td>2</td>
<td>-40%</td>
</tr>
<tr>
<td>3</td>
<td>-30%</td>
</tr>
<tr>
<td>4</td>
<td>-22%</td>
</tr>
</tbody>
</table>

**Border Crossing Volumes**

**Northbound Pedestrian Crossings**
May 2020:

- **-65%** below monthly average (Jan 2019-Feb 2020)
- Increase from April 2020 to May 2020: **+44%**

**Northbound POV Crossings**
May 2020:

- **-44%** below monthly average (Jan 2019-Feb 2020)
- Increase from April 2020 to May 2020: **+17%**

*Note: Monthly averages are for Jan 2019-Feb 2020 period. Travel restrictions at the border were implemented in March 2020.*

*Source: U.S. Customs and Border Protection (CBP)*
Travel Around the San Diego Region
Survey: Vehicle Travel and Telework

- 89% reported driving less during the health crisis
  - 81% expect their vehicle travel to increase over the next six months

- 78% reported using online shopping and delivery more
  - 42% expect to continue at a higher rate

- 48% reported driving less for work because of telework
  - About half of those who teleworked said they saw it continuing

Employer Telework Trends During the COVID-19 Health Crisis

Of the 137 employers surveyed

55% said they have had employees who have teleworked during the COVID-19 health crisis

When asked if they would offer telework after COVID-19

- 26% said yes
- 46% said no
- 28% said maybe
Employers' Future Telework Plans

When asked what percent of their workforce would continue to telework, the most common response was **less than 25%**.

Of those companies who said they would offer telework post-COVID-19, **9%** said they would offer it **full-time**.

The most common response (71%) was to offer telework **2-3 times a week**.

---

Employers' Top 5 Reasons for Offering Telework

- Increased job satisfaction (**67%**)
- Productivity (**55%**)
- Improved work / life balance (**55%**)
- Helping the environment (**50%**)
- Cost savings in leasing commercial space (**30%**)
What is the Potential for Telework in the San Diego Region?

61% of occupations are not conducive to telework

64% of occupations are considered essential jobs
- 42% of essential jobs are not conducive to telework

Jobs that Can be Done at Home Typically Earn Higher Wages
Who Teleworks in San Diego Region?

Telework Targets in Regional Plans

- **Occasional telework**
- **Permanent telework**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2035</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2050</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### SANDAG
Broadband Connectivity and Internet Access

- **23%** of households earning less than $50,000/year do not have a broadband subscription
- **20 – 40%** of students in many local districts are under-connected or lack home internet access
- **42%** of people who live in the County’s rural areas have fixed internet, versus **97%** of the people who live in urban areas

Travel Around the San Diego Region
Survey: Active Transportation

- **14%** are biking more
  - 85% will continue biking more for recreation, exercise, shopping, and errands
- **50%** are walking more
  - 82% will continue walking more for recreation, exercise, shopping, and errands
Cycling on the Rise in the Region

- **91%** increase in bike volumes on eight regional bikeway corridors
- Data collected May 2020 and compared to May 2019 volumes

Source: SANDAG Eco-Counters

Cycling on the Rise in the Region

- San Marcos Inland Rail Trail **+211%**
- Solana Beach Coast Highway **+109%**
- Rose Canyon Bike Path **+107%**
- Chula Vista Bayshore Bikeway **+158%**

University Avenue **+88%**
4th & 5th Avenues **+63%**
Landis Street **+52%**
30th Street **+54%**

Source: SANDAG Eco-Counters
Shared Streets

- SANDAG Shared Streets Pilot Program awarded $95,000 to 11 jurisdictions to create safe spaces for biking, walking, scooting, and more

NCTD COVID-19 Response

Item 3 | Joint Transportation, Regional Planning, and Borders Committees Meeting | July 17, 2020
COVID-19 Impact on Transit Ridership

Change in demand
Public transit has experienced drops in demand across the board, while continuing to be a lifeline for those who must travel. You can use this chart to compare changes in different places.

Is This The Final.....
Predictions Versus Reality

“The horse is here to stay but the automobile is only a novelty—a fad.” — President of the Michigan Savings Bank advising Henry Ford’s lawyer, Horace Rackham, not to invest in the Ford Motor Company.

1903

“There’s no chance that the iPhone is going to get any significant market share.” — Steve Ballmer, Microsoft CEO.

2007

Television won’t be able to hold on to any market it captures after the first six months. People will soon get tired of staring at a plywood box every night.” — Darryl Zanuck, 20th Century Fox.

1946

Service Recovery & Restoration

The Atlantic
Industry Response to COVID -19

- Approximately 30 taskforce members
- Three priority areas:
  - Communicating the Transit Narrative and Rebuilding Public Confidence
  - Recovery & Restoration of Service
  - Transit Leadership in the Post-COVID-19 Mobility Landscape
- Final Report anticipated in October 2020
Funding & Regulatory Relief

- The CARES Act provided $25 billion for public transit formula operating and capital grants to prevent, prepare for, and respond to COVID-19 (federal).
- Funding challenges remain. Potential opportunities for funding include:
  - Additional round of stimulus funding
  - Infrastructure bill
  - Re-Authorization of Surface Transportation Bill
  - State Emergency Funds

State and Federal Regulatory Relief

Operator Safety & Vehicle Cleaning Practices
Economic Recovery & Prosperity

Outreach & Marketing
Updating Service Plans

STRATEGIC MULTIMODAL TRANSIT IMPLEMENTATION PLAN

- Rail Capital Investments
- Upgrade Rail Frequency
- Core Network Investments
- High-Frequency Core Bus Network
- New FLEX service variations
- Core Network Access Options
- Focus local routes on core ridership growth
- Technology & Customer Experience

Enhancing Mobility Post COVID-19
Thinking Beyond Today’s Pain

• “Someone’s sitting in the shade today because someone planted a tree a long time ago.”

• “If you aren’t willing to own a stock for ten years, don’t even think about owning it for ten minutes.”

Questions?
MTS COVID-19 Update on Ridership and Safety Protocols

MTS Rider Profiles

Abraham  Rosario  Marzaacita

Derek  Nora  Jerry
Transit’s Role in Economic Recovery

- Passenger Median HH Income: $17,800

- Regional Median HH Income: $75,000

<table>
<thead>
<tr>
<th>Total Annual Household Income</th>
<th>2017</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; $15,000</td>
<td>36%</td>
<td>41%</td>
</tr>
<tr>
<td>$15,000 - $49,999</td>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>$50,000 - $74,999</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>$75,000 - $99,999</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>$100,000+</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>

- More than two-thirds (69%) of MTS riders are employed either full-time or part-time.

$1 Public Investment = $2.82 Return

- Fermanian Business & Economic Institute, Point Loma Nazarene University
MTS Ridership (Overall)

- 75% ridership decrease
- 53% increase since Apr. 6

MTS Ridership (Bus)

- 80% ridership decrease
- 71% increase since Apr. 6
MTS Ridership (Trolley)

- 68% ridership decrease
- 36% increase since Apr. 6

MTS Clean Ride

- Always
  - 935 vehicles cleaned thoroughly every day
  - 54 Trolley Stations cleaned daily
  - 400+ Bus Shelters cleaned at least twice per week and as needed
  - 1,500 bus benches cleaned one to three times per week
- Since Hep A Outbreak
  - Use of strongest disinfectants recommended by CDC
  - Vinyl seats on all Trolleys
MTS COVID-19 Protocols

- Mandatory face coverings for employees/passengers
- Rear-door boarding
- No cash
- Germ barrier installations
- Daily temp checks for all employees
- Disinfecting fog
- Handwashing stations

Keeping in Line with Industry Best Practices

- Assesses current policies, procedures and operation practices
- Looks elsewhere in the industry to learn best practices
- Recommends where MTS can adjust in short-term
- Begins to address long-term implications
What is Important to MTS Passengers?

<table>
<thead>
<tr>
<th></th>
<th>0</th>
<th>0.5</th>
<th>1</th>
<th>1.5</th>
<th>2</th>
<th>2.5</th>
<th>3</th>
<th>3.5</th>
<th>4</th>
<th>4.5</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enforcement of Face Coverings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social distancing on board</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily disinfecting of vehicles and stations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hand sanitizers installed at stations or on vehicles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seeing cleaning crews at stations and on vehicles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased security and/or ambassadors at stations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Best Practices for Passengers

• Always wear a face covering
  • MTS branded face covers: Week of July 20
• Practice physical distancing when possible
• Carry hand sanitizer
• Avoid conversation while riding
• Use our Mobile App
  • Compass Cloud
  • One-ways now available
• Text Security: 619-318-1338
• Watch videos at sdmts.com
Next Steps

- Clean Ride education efforts
  - Onboard/outdoor/digital education efforts
- Monitoring capacity/passenger loads
- Keeping an eye on school decisions for September service changes
- Innovations Task Force
  - Real-time passenger loads
  - Alerts system
  - Audible Help Tools

Questions?

Sharon.cooney@sdmts.com