

National Surface Transportation Policy and Revenue Study Commission

DEMOGRAPHY IS DESTINY

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WHAT IS CONGESTION ?

Congestion is:

People with the economic means to act on their social and economic interests - getting in the way of other people with the means to act on theirs!

The great loss from congestion is not the extra three minutes it takes to get home

HOUSEHOLDS

- ❑ It's the decline in the number of jobs I could reach in 1/2 hr!
- ❑ It's the decline in the number of affordable homes accessible to my work!
- ❑ It's the decline in the assurance of arriving on time!

BUSINESSES

- ❑ It's the decline in the number of workers within 1/2 hr of my employment site!
- ❑ It's the decline in the number of suppliers & customers within 1/2 hr of my business!
- ❑ It's the decline in shipment reliability!

Our Menu

MUST DO

- ❑ COMMUTING IN CONTEXT
- ❑ WORK FORCE ATTRIBUTES
- ❑ OVERVIEW OF PATTERNS AND TRENDS
- ❑ SHIFTING MARKETS
- ❑ 4 KEY DICHOTOMIES

CAN REVIEW

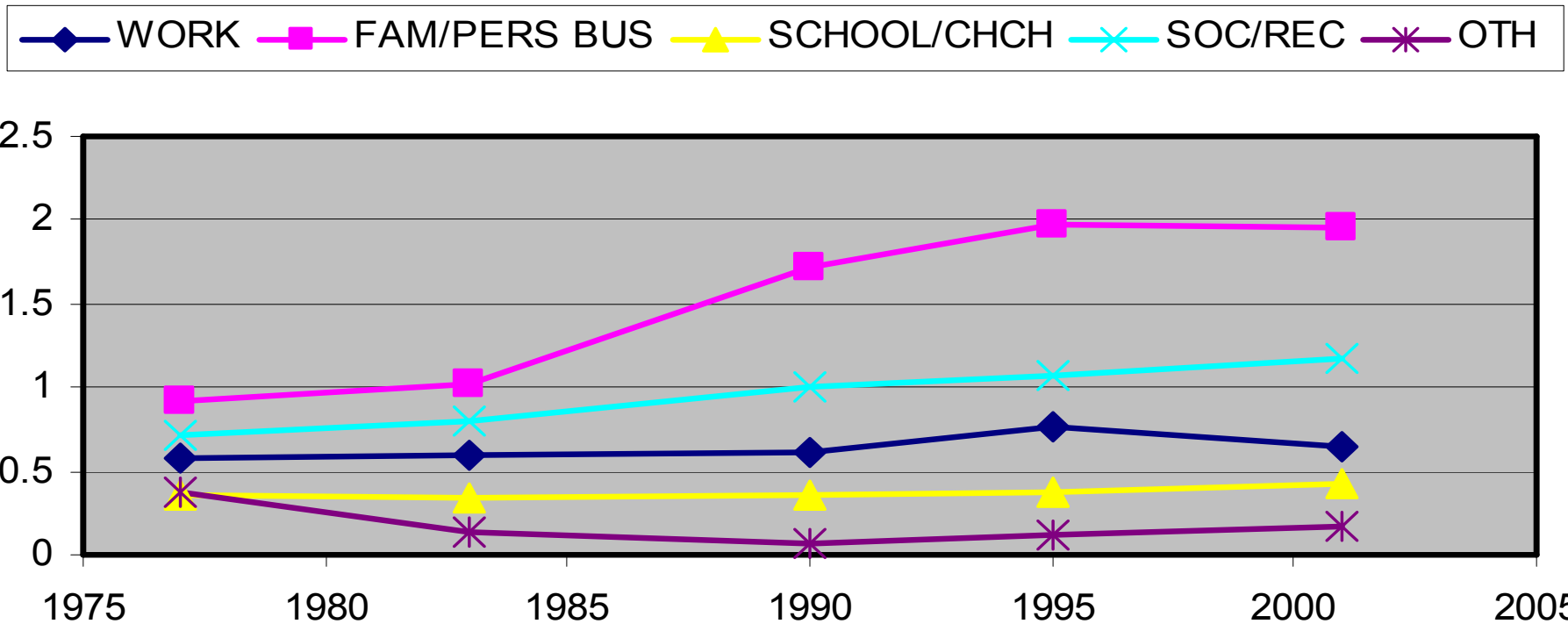
- ❑ VEHICLE AVAILABILITY
- ❑ JOB/WORKER BALANCE
- ❑ TRAVEL TIME TRENDS
- ❑ EXTREME COMMUTES
- ❑ DETAILED MODAL TRENDS
- ❑ INCOME & TRAVEL

There's more to transportation than just commuting!

- ❑ **COMMUTING (20% of local psgr travel)**
 - ❑ **OTHER LOCAL TRAVEL**
 - ❑ **TOURISM**
 - ❑ **PUBLIC VEHICLES (gov. services)**
 - ❑ **SERVICES**
(Power/phone/cable/sewer/water)
 - ❑ **URBAN GOODS MOVEMENT**
 - ❑ **THRU PASSENGER TRAVEL**
 - ❑ **THRU FREIGHT TRAVEL**
-

Commuting in Context

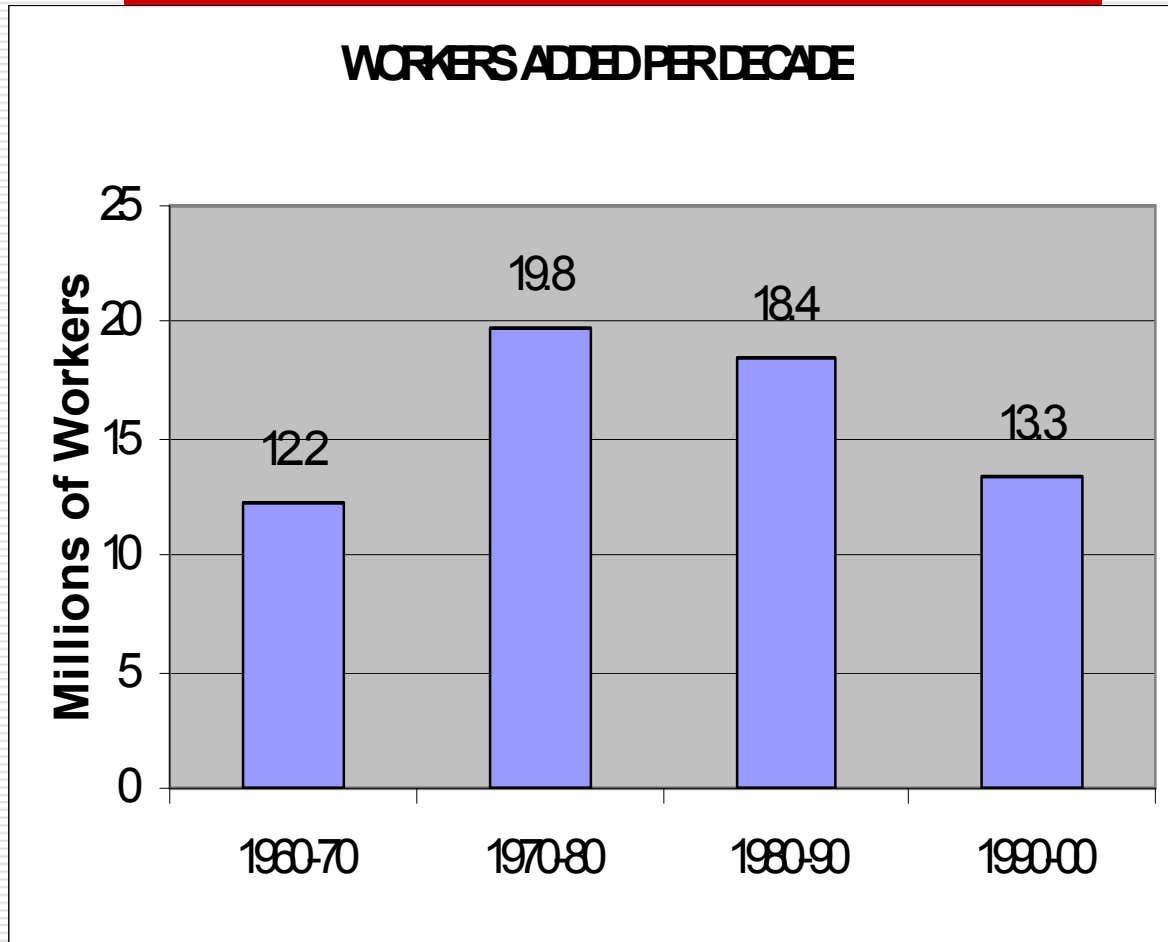
Daily trips per Capita



- The New Millennium World – a challenged affluent society

- ❑ A STABLE “OLD” POPULATION**
- ❑ SKILLED WORKERS AT A PREMIUM**
- ❑ WORKERS CAN LIVE, WORK ANYWHERE**
- ❑ WHO, WHERE ARE THE IMMIGRANTS?**
- ❑ MAINSTREAMING MINORITIES**
- ❑ THE “SCOURGE” OF AFFLUENCE**
- ❑ THE GLOBALIZATION OF EVERYTHING**

END OF THE BOOM



1980-90

■ 18.5 MILLION WORKERS

■ **1990-2000**

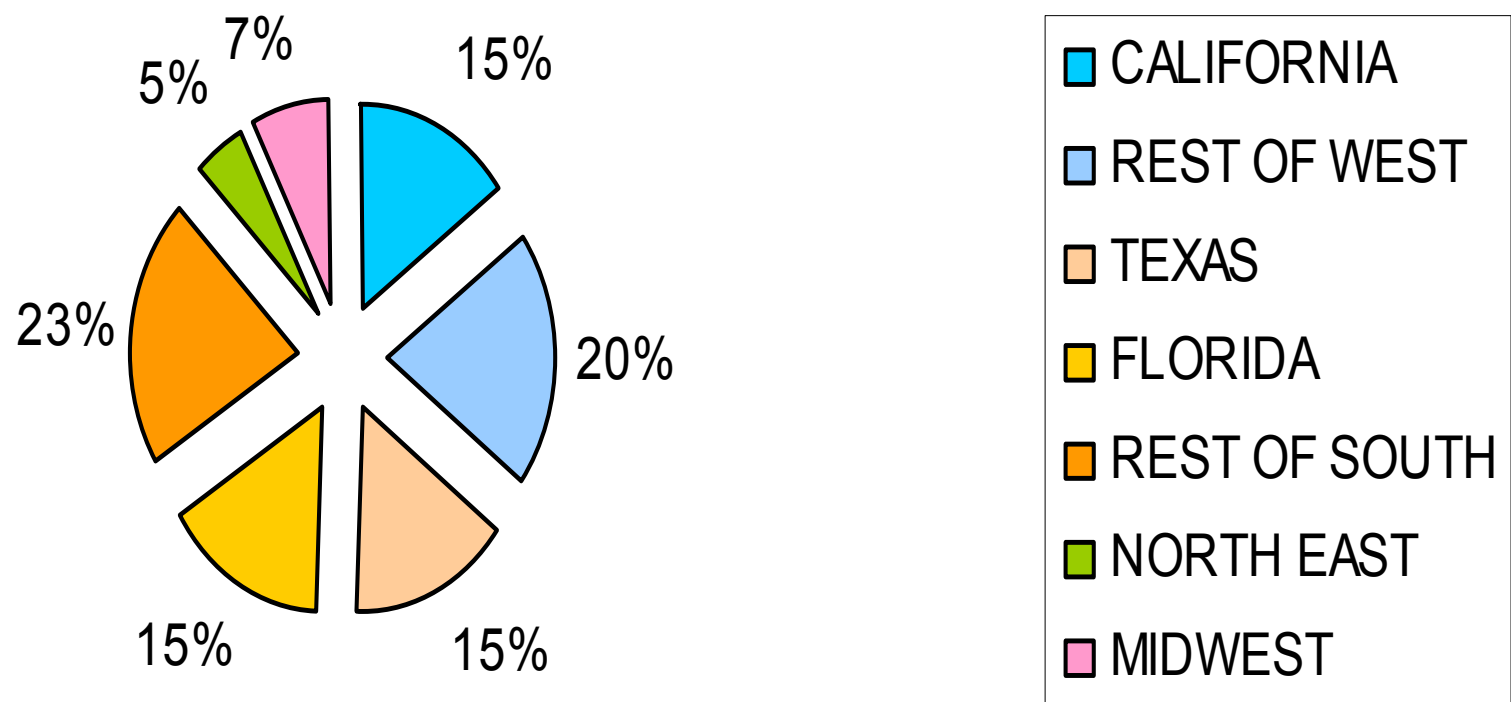
■ 13.3 MILLION WORKERS

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

**WE ADD THE POPULATION OF
A CANADA EACH DECADE!!!!**

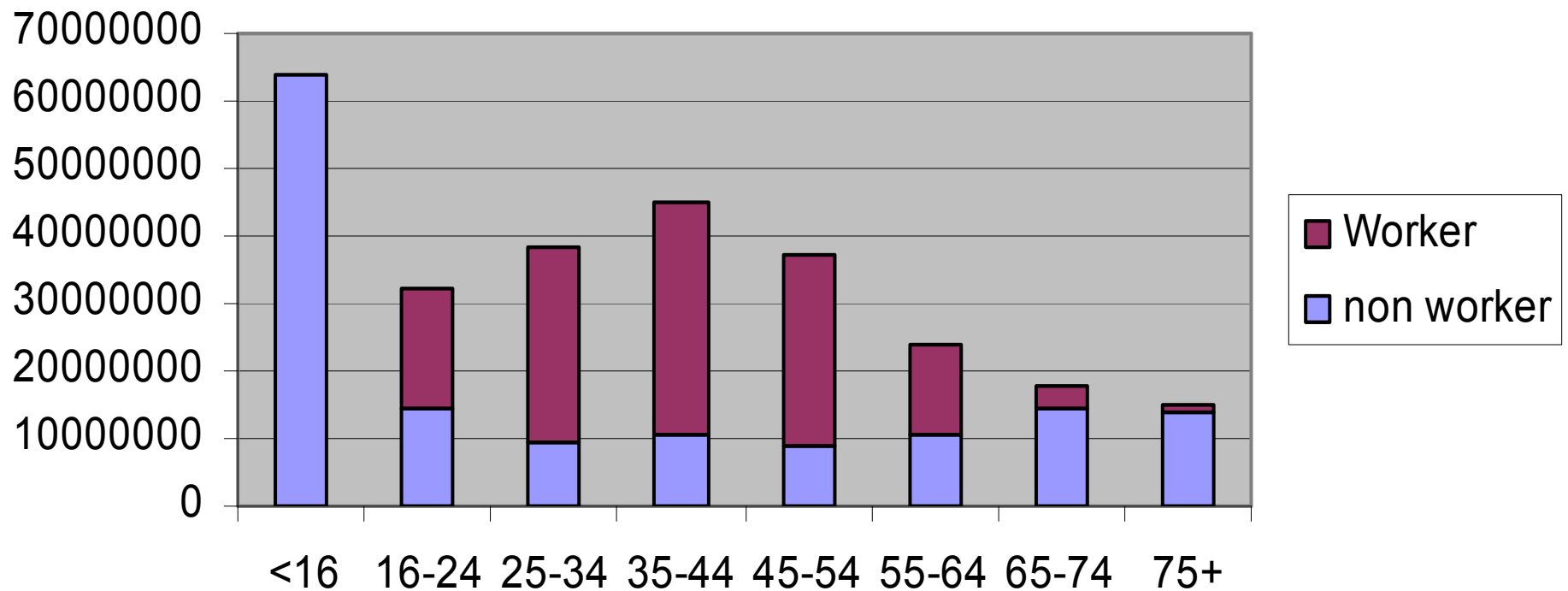
**DO WE ADD CANADA'S
TRANSPORTATION
SYSTEM?**

SHARE OF POPULATION CHANGES 2000-2030



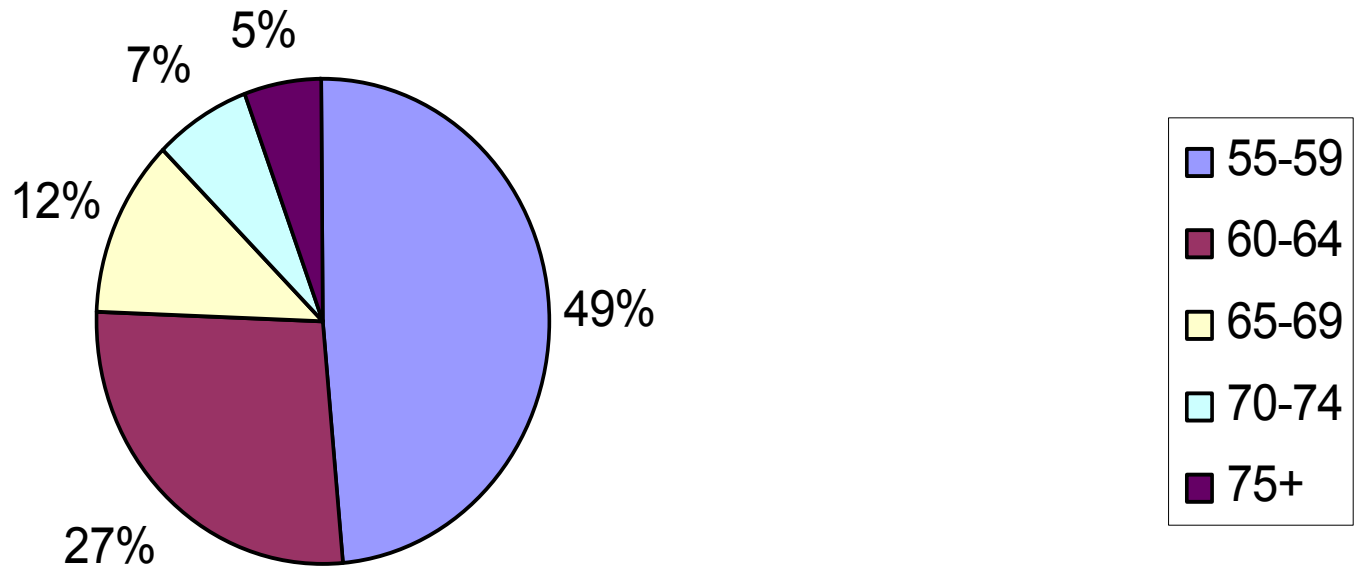
Commuting in Context

workers by age group 2000

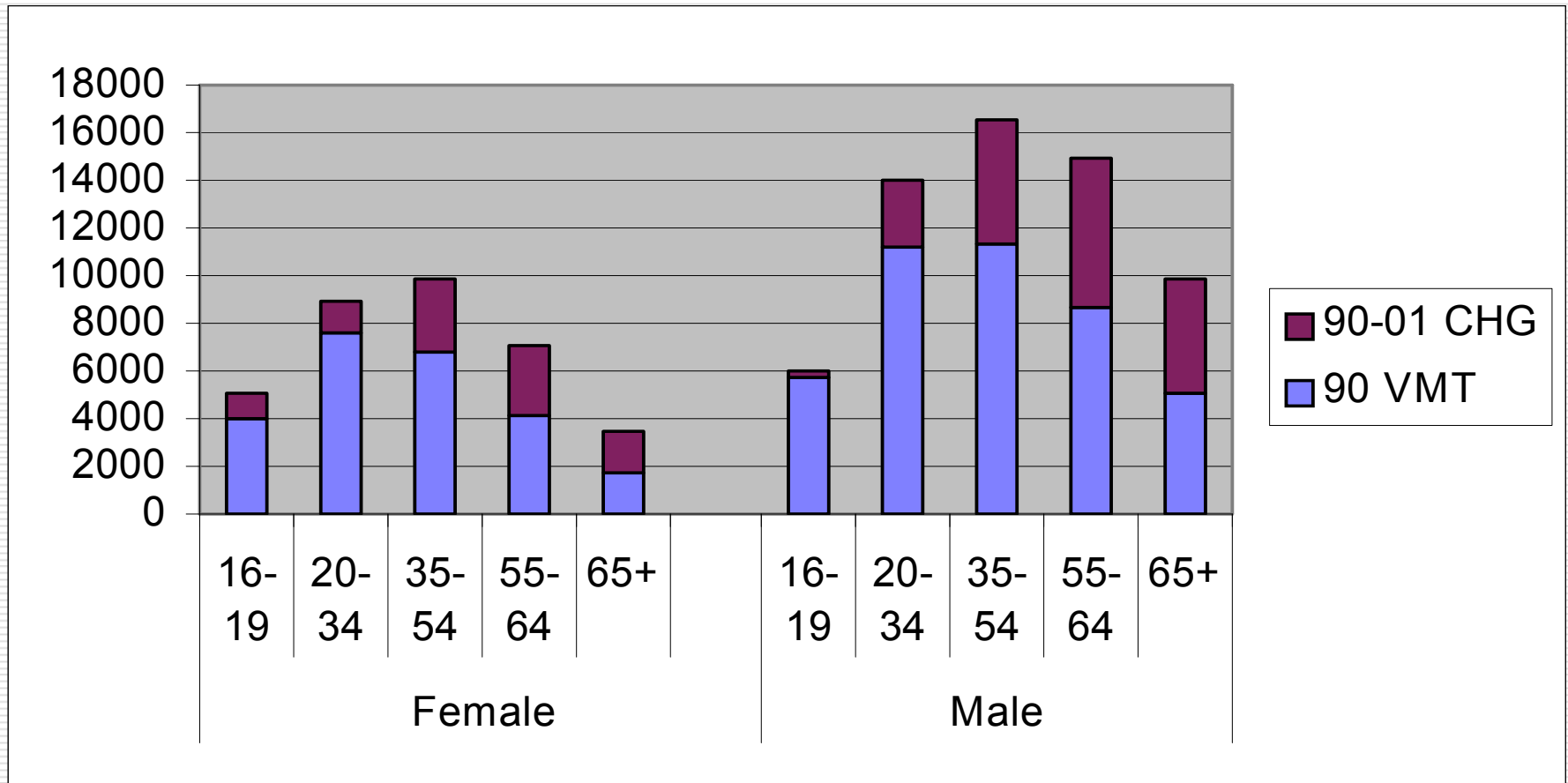


Aging out of the Boomers -1

SHARES OF OVER 55 WORKERS BY AGE GROUP



TREND IN PERSONAL VMT – by age-sex

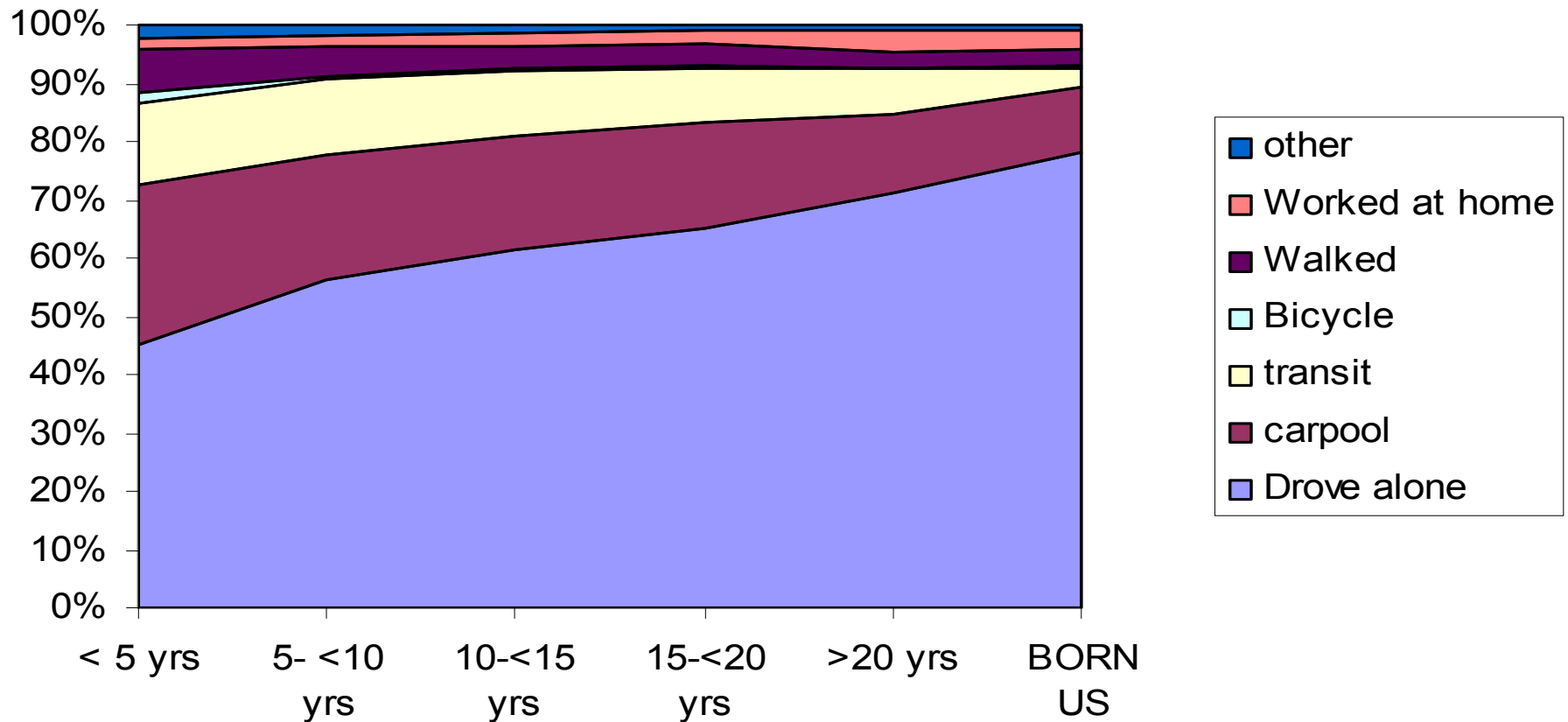


THE SHIFT HAS BEGUN

<u>OVER 65</u>	<u>1990</u>	<u>2000</u>	<u>%</u>
POPULATION	31.2	35.0	12.2%
WORKERS	3.5	4.25	21.4%
SHARE AT WORK	11.2%	12.1%	

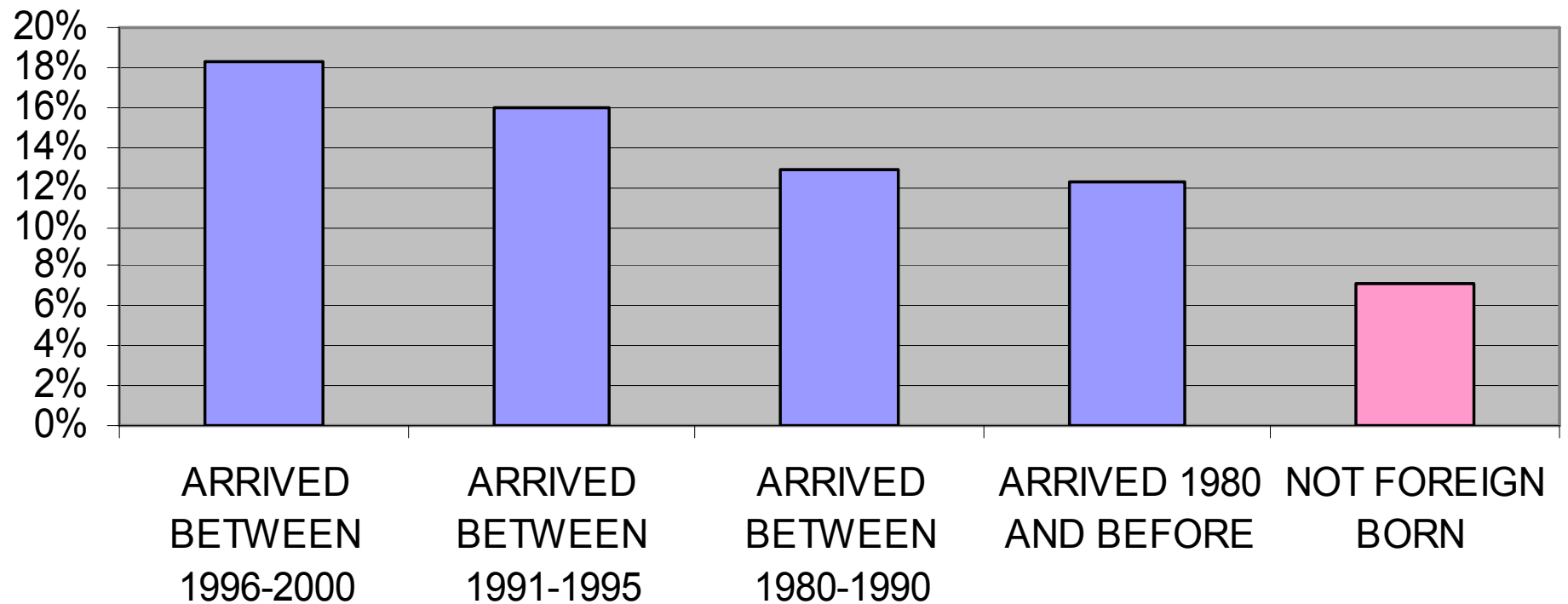
The Immigrant story - 1

Mode Use by Years in US



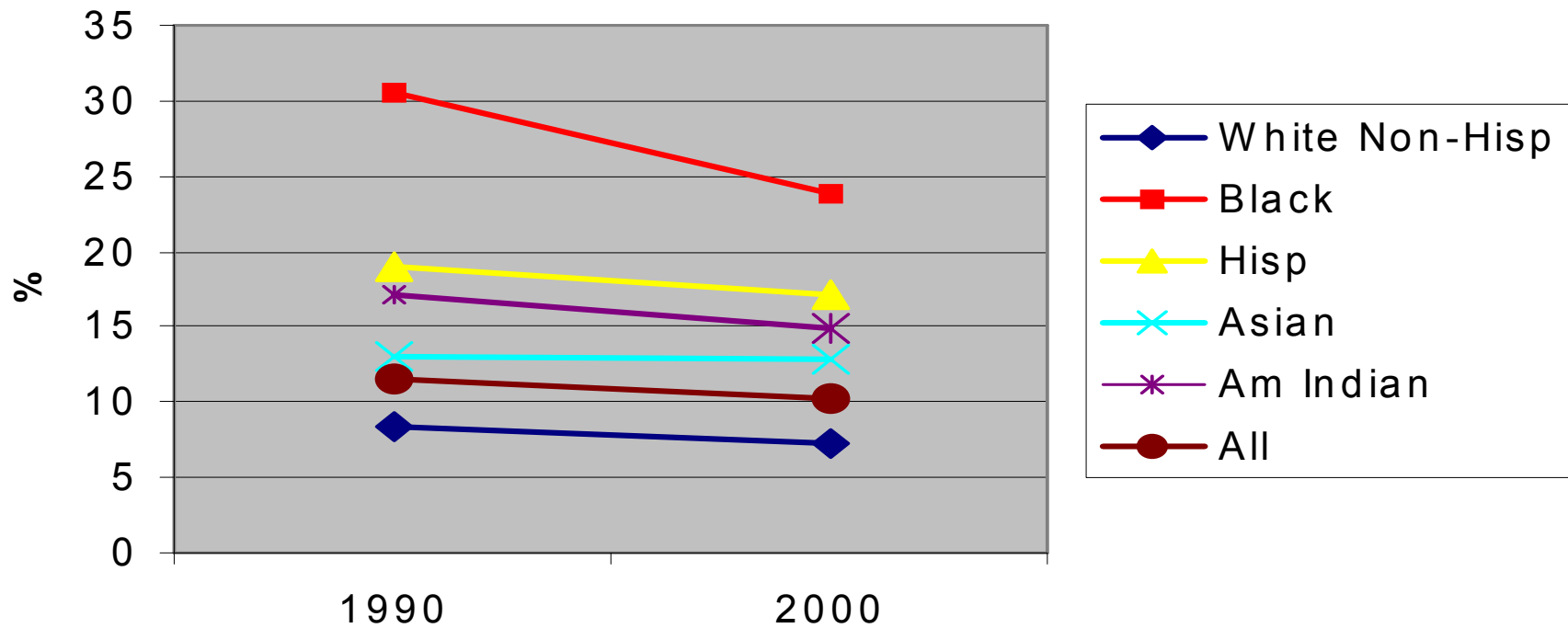
Immigrant Story – 2

**Foreign-born persons in households without Vehicles
by Year of Arrival**



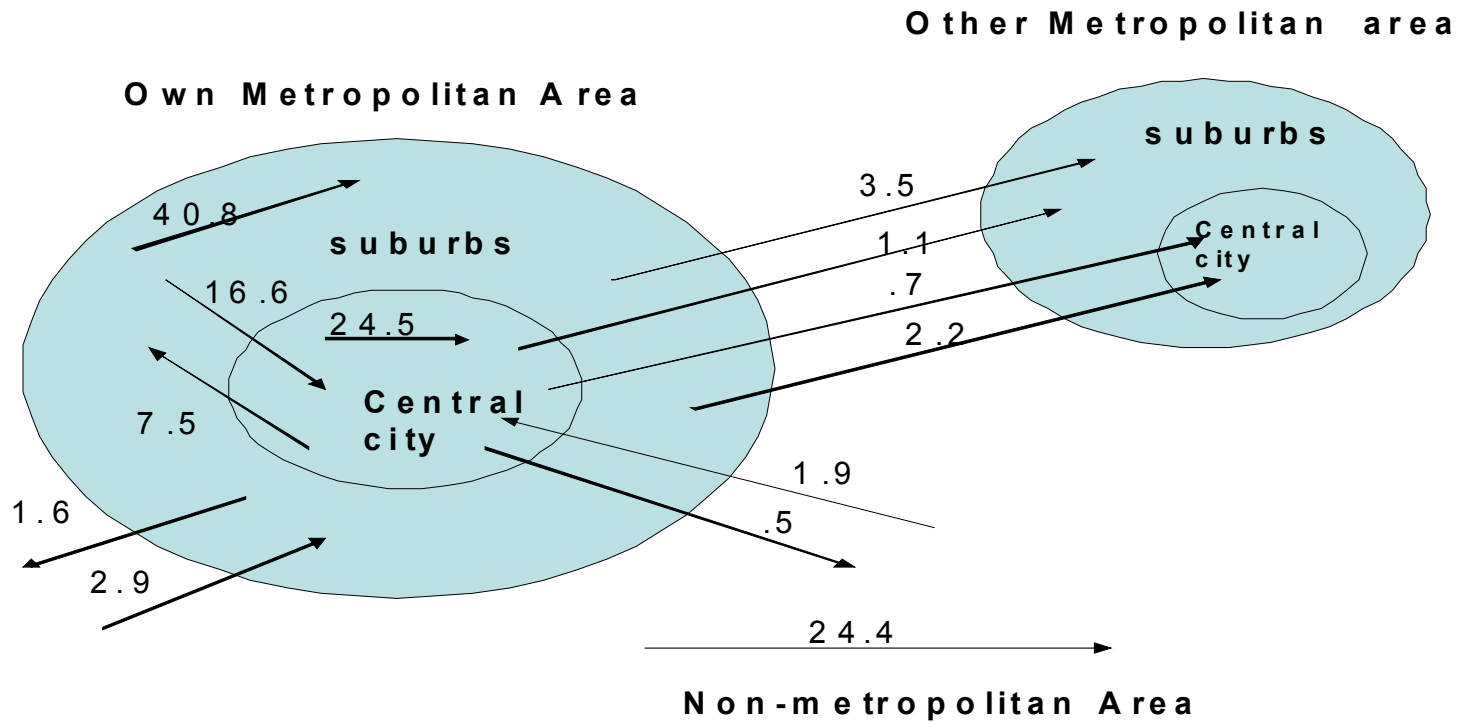
The most important trend?

Households without Vehicles by Race and Ethnicity

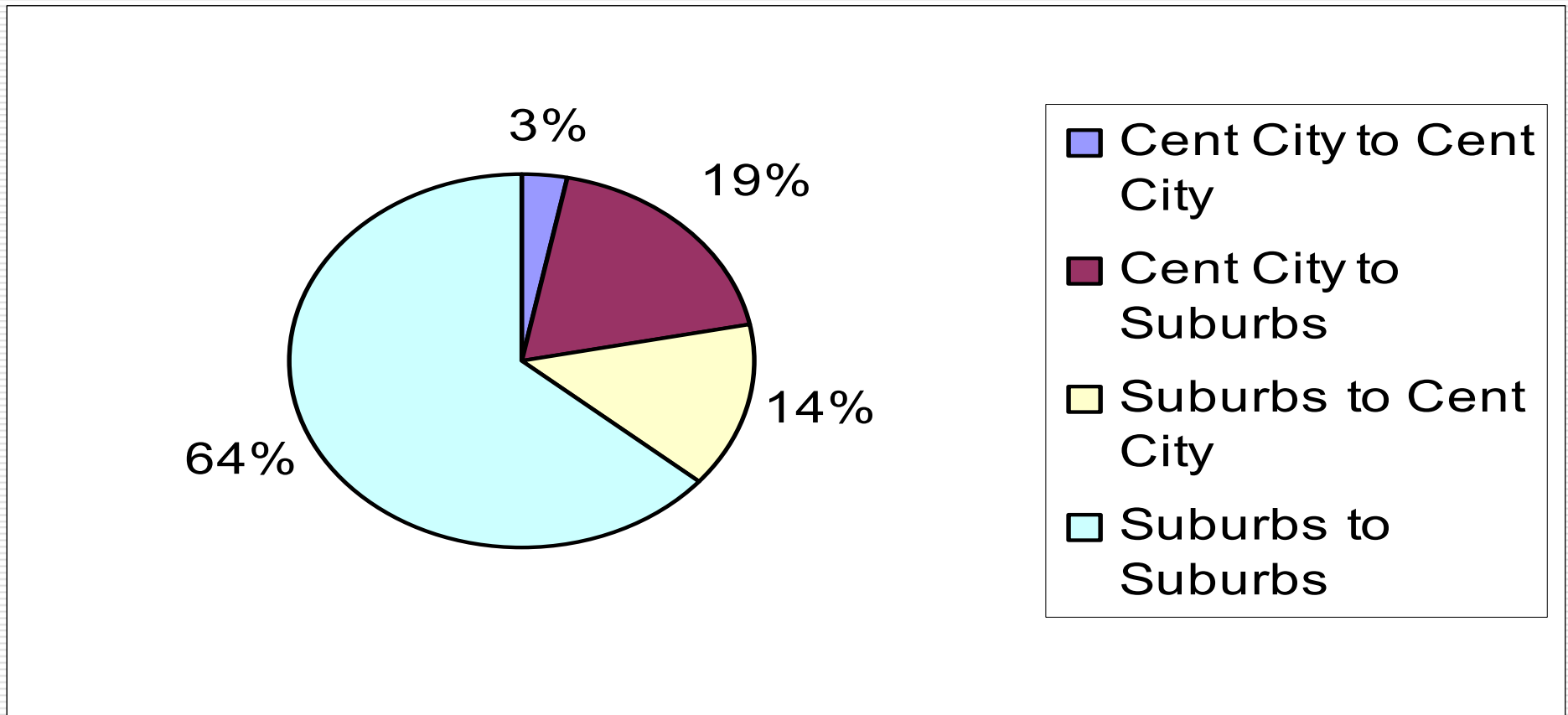


COMMUTING MARKETS

2000 METRO FLOW MAP



Share of Increase in Commuting Flows 1990-2000



The “Donut” Metro

- ❑ Jobs and workers centered in suburbs
- ❑ 46% of commutes;
- ❑ 64% of growth 90-00
- ❑ 7.5 million coming in to the subs from exurbs and other metros each day
- ❑ 7.5 million going out to the subs from central cities
- ❑ CC to subs > Subs to CC in share of growth

The Focus will be on Big Metros

◆ 60% of population in big metros

(2000)

- 1960 34 areas over 1 million
- 1990 39 areas over 1 million
- 2000 50 areas over 1 million
- 2005 53 areas
- Probably 60 by 2020

◆ 60/20/20 big metro/metro/rural

The Focus will be on Major Metros

- ◆ **12 areas with more than 5 meg.**
 - ◆ **1/3 of national pop.; 100 meg.**
 - ◆ **Growth is in exurbs expanding areas**
- **NY, LA, CHI, DC, SF, DFW, PHIL, BOS, DET, MIA, HOU, ATL,**
 - **PHX, SEA next**

% LEAVING COUNTY TO WORK

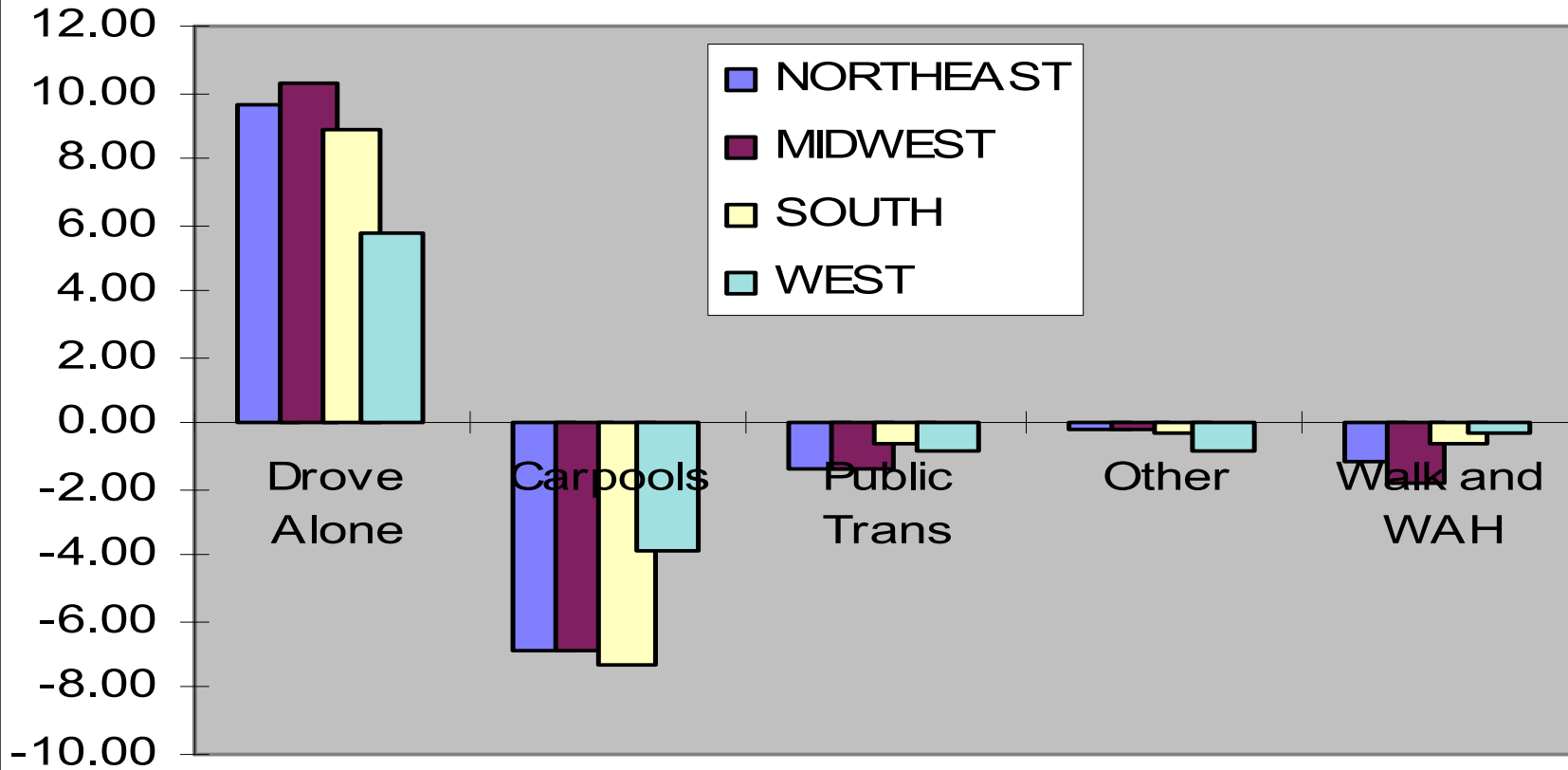
U.S.

- ☐ 1990 23.9% of workers left home**
- ☐ 2000 26.7%**
- ☐ OF ALL 13.2 Meg. WORKERS 51%
Left home county (6.7 Meg.)**
- ☐ ONLY 3 STATES DOWN !**
- ☐ Wash DC Area leads**

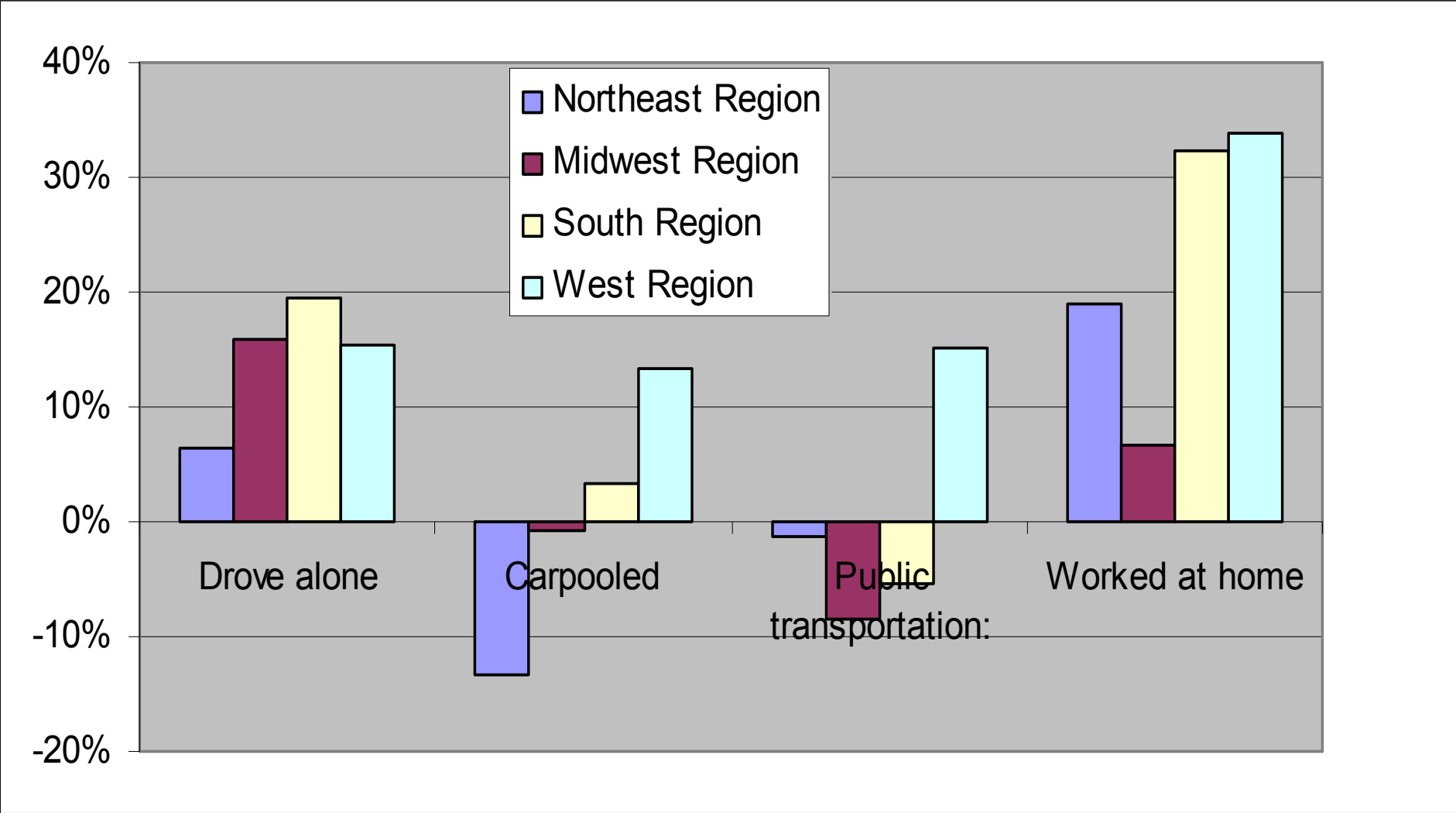
	1980		1990		2000		20 yr C H G
TOTAL WORKERS	96617	100.00%	115070	100.00%	128279	100.00%	31662
DRIVE ALONE	62193	64.37%	84215	73.19%	97102	75.70%	34909
CARPOOL	19065	19.73%	15378	13.36%	15634	12.19%	-3431
TRANSIT	6008	6.22%	5889	5.12%	5869	4.58%	-139
TAXI	167	0.17%	179	0.16%	200	0.16%	33
MOTORCYCLE	419	0.43%	237	0.21%	142	0.11%	-277
BICYCLE	468	0.48%	467	0.41%	488	0.38%	20
OTHER	703	0.73%	809	0.70%	901	0.70%	198
WALKED ONLY	5413	5.60%	4489	3.90%	3759	2.93%	-1654
WORK AT HOME	2180	2.25%	3406	2.96%	4184	3.26%	2004

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NET REGIONAL MODE SHARE CHANGES 1980-1990

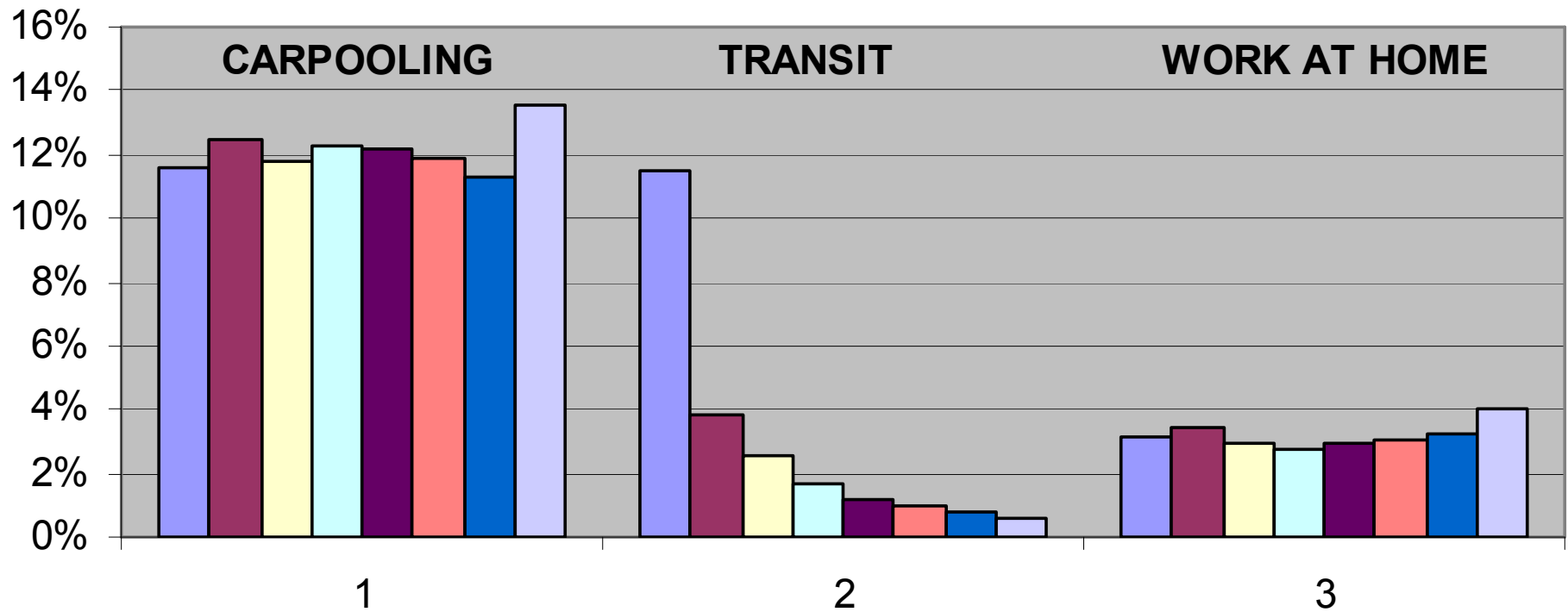


1990-2000 Net Regional Shift

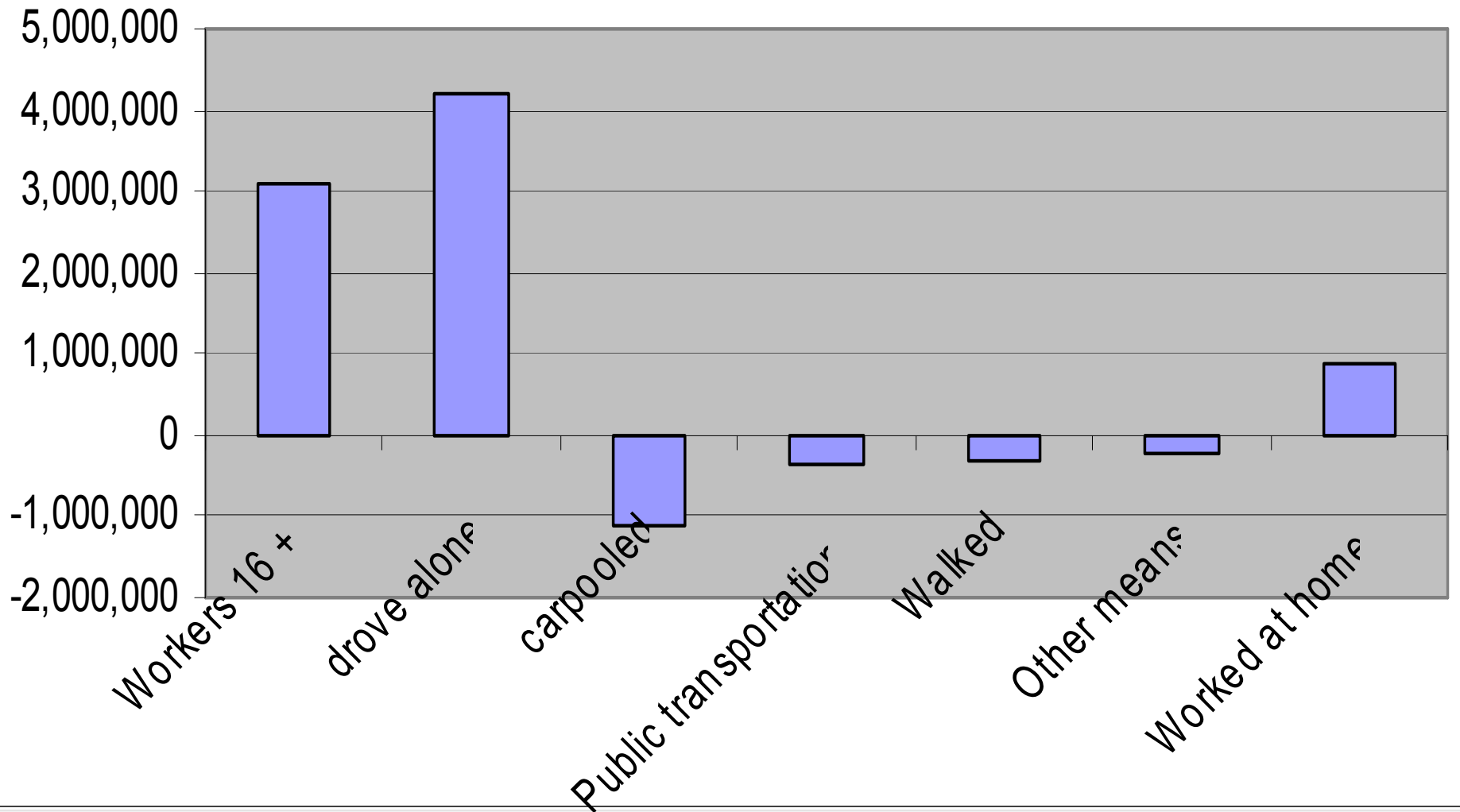


Important Pattern Changes

- ❑ Carpool resurrected; by Hispanics?
- ❑ Up in West; down in Southeast
- ❑ Transit up in West; down in rest
- ❑ SOV saturation? Largest gains in 80's
- ❑ 5 areas with actual declines in SOV
 - Seattle; Portland, SF, PHX, ATL down
 - Los Angeles, DFW, SAC, LV holding
 - DN, TAMPA, SLC, NYC small gains



2000-2004 net trend ACS



New Patterns to Watch

- Who, where will the workers be?
- Will long distance commute expand further?
- Will role of commuting decline/grow or just change?
- Will value of time still be the guiding factor?
- Value of mobility recognized?

In This New World the Great Issue Will Be Skilled Workers

- ❑ Finding skilled workers will be the key concern of business.**
- ❑ They will go where those people are;**
- ❑ or, go where those people want to be!**
- ❑ States and Metro areas that can provide this resource will be big winners!**
- ❑ Minorities, Immigrants and rural populations will be a crucial part of the work force**

Work Force Issues

- Older workers in labor force**
- Even more females in labor force**
- Even more variable schedules**
- Work hours – a lot like part time**
- Skills matches – more spreading out**
- Amenities-based employment**

WHAT DOES THE FUTURE LOOK LIKE?

- MORE AFFLUENCE** ✓ More
- LOWER DENSITY** ✓ Less
- AUTO AFFORDABILITY** ✓ More
- AUTO PRONE AGE** ✓ More
- AUTO TRIP PURPOSE** ✓ More
- DISPERSED DESTINATIONS** ✓ More
- HIGHER FREIGHT VALUE** ✓ More
- MORE TIME SENSITIVITY** ✓ More
- DEMOCRATIZATION OF MOBILITY** ✓ More

Thank you

☐ Reference material follows

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