NYC TIPPS Research

Travel Inbound Pandemic Projections Study
(NYC Central Business District (CBD) Travel Patterns Before, During and After Pandemic)

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Background & Methodology

- Sam Schwartz Engineering, DPC, in conjunction with Clarion Research, aims to understand how people traveled into New York's Central Business District (CBD) before and during pandemic, and how they predict they will travel when the pandemic is over. The CBD consists of all Manhattan south of 60th Street.

- This Travel Inbound Pandemic Projections Study (TIPPS) was conducted as an online survey invited among a representative sample of New York metropolitan area residents in the Spring of 2021 in order to determine…
  - Pre-Pandemic travel patterns into NYC's Central Business District (CBD) in Spring 2019, based on respondent recollections,
  - Mid-Pandemic travel patterns as reported in Spring of 2021, and
  - Post-Pandemic travel patterns expected by Spring of 2023, based on respondents' predictions of their own future behaviors should the pandemic be over by then.

- 1,267 residents of the New York metropolitan area completed a short survey to determine overall travel patterns, and 500 travelers who entering the NYC CBD on a typical weekday in the 2019 and/or 2021 or indicated likelihood to do so in 2023 were interviewed further to determine CBD travel patterns.
  - Respondents were 18+ years old and targeted for being an area resident.
  - The full survey averaged 10 minutes in length.
  - Data collected in May 2021.

- The base of 1,267 represents +/- 2.8% margin of error. Bases of likely travelers into the NYC CBD before, during, and after the pandemic are smaller and therefore the margin of error is wider for those subgroups (+/- 4.7% for pre & post pandemic travelers and +/- 7.3% for during pandemic travelers).

- TIPPS data (including both short and full surveys) was weighted iteratively taking into account census demographics as well as the NYMTC Hub Bound Travel Data for 2019.
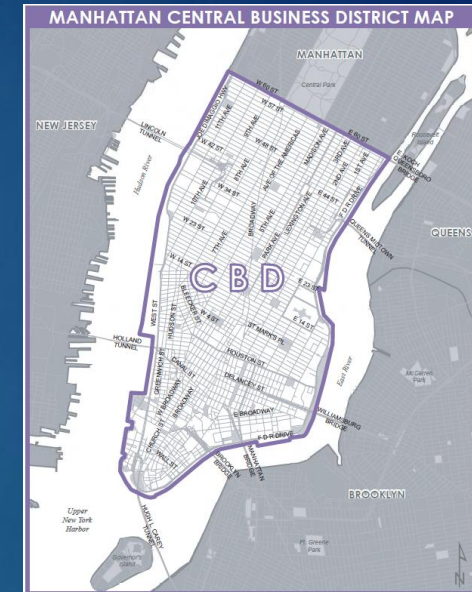
Source: NYMTC Hub Bound Travel Data 2019

Key Takeaways

- The reported number of projected weekday inbound daily trips during the pandemic dropped from an estimated 3.9 million in the Spring of 2019 to 1.3 million in the Spring of 2021, a 67% decrease from pre-pandemic levels.

  - This equates to a net drop of over 2.6 million reported daily inbound trips to the NYC CBD on a typical spring weekday.

  - Only 14% of area residents regularly traveled into the CBD on weekdays in 2021, down from 34% in 2019.

- Frequency of regional travel into the NYC CBD is predicted to remain below 2019 levels post-pandemic (Spring of 2023).

  - The total number of daily trips into the CBD is projected to be 3.6 million, 8% below 2019 levels.

  - And trips on public transportation specifically are projected to be 2.3 million in 2023 vs. 2.8 million in 2019 once the pandemic is over, 18% below 2019 levels.

- Area residents predict a robust rebound in incidence of travel into the CBD by Spring 2023 if the pandemic is over by then; 34% expect to travel in then, the same proportion as before the pandemic in 2019.

  - This actually represents a slight (0.6%) increase vs. 2019. It may be somewhat understated since new people from outside the region who may be moving into the area are not included.

  - Notably, the difference between the two metrics (daily trips vs people) means that those coming into the CBD post-pandemic predict they will be taking fewer regular weekday trips.

- Safety concerns have been a factor in public transit ridership during the pandemic. Post-pandemic, most people believe they will return to feeling safe again, but some modes will feel safer than others.

PANDEMIC IMPACT ON CURRENT & FUTURE TRAVEL

Most people say the pandemic is currently impacting their travel to the NYC CBD and predict in general that their patterns will return to normal after the pandemic is over.

Pandemic Impact on Current & Predicted Future Travel
Strongly or Somewhat Agree on a 4-point scale
Weighted Base: Total Travelers, N=500

The pandemic is currently impacting the way I travel and how often I travel to Manhattan below 60th Street.

49% **34%** **83%**

After the pandemic is over, it's likely that the way I travel and how often I travel to Manhattan below 60th Street will be the same as how I traveled before the pandemic.

34% **39%** **74%**

■ Strongly Agree ■ Somewhat Agree

The number of daily trips into the NYC CBD by regional residents plummeted from an estimated 3.9 million to 1.3 million during the pandemic, a 67% drop from pre-pandemic levels. The number of regional travelers coming into the NYC CBD, or the incidence of travel in, plummeted from 34% to 14% during the midst of the pandemic, a 58% drop among all screened from pre-pandemic levels.
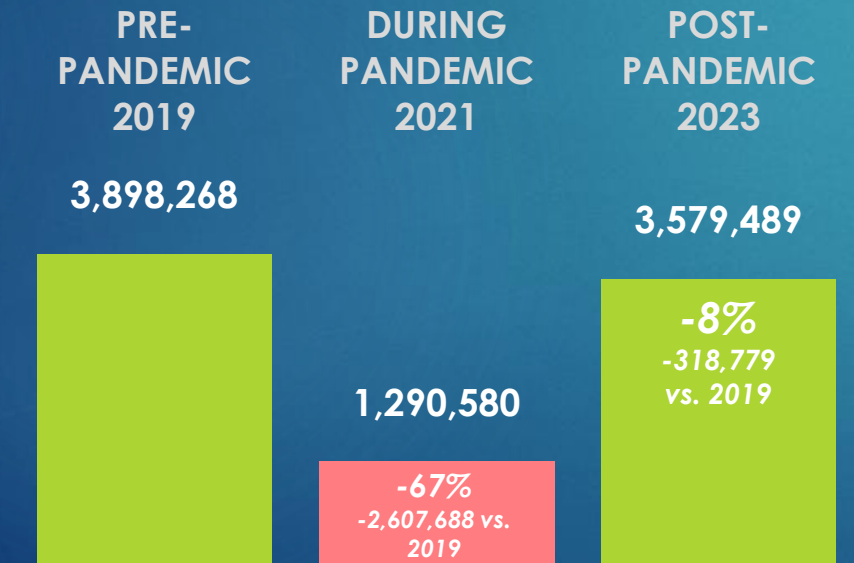
Regional travelers predict a decline of 8% in the number of inbound weekday trips in a post-pandemic 2023. Despite the decline in daily trips in, the proportion of area residents who predict that they will be traveling into the NYC CBD regularly again by 2023 actually increases slightly (0.6%) vs. pre-pandemic 2019.

The difference between the two metrics (daily trips vs weekly people) is related to the frequency of predicted travel in, which will be lower post pandemic, largely due to an expected increase in continued work from home.

Regional Travel to NYC CBD on a Typical Spring Weekday
Weighted Base: Among Total Surveyed, N=1,267

Projected Number of Daily Trips Into CBD

PRE-PANDEMIC 2019	DURING PANDEMIC 2021	POST-PANDEMIC 2023
3,898,268	1,290,580	3,579,489
	-67% -2,607,688 vs. 2019	-8% -318,779 vs. 2019

People: Incidence of Regular Weekday Travel

PRE-PANDEMIC 2019	DURING PANDEMIC 2021	POST-PANDEMIC 2023
34%	14%	34%
	-58% vs. 2019	+0.6% vs. 2019
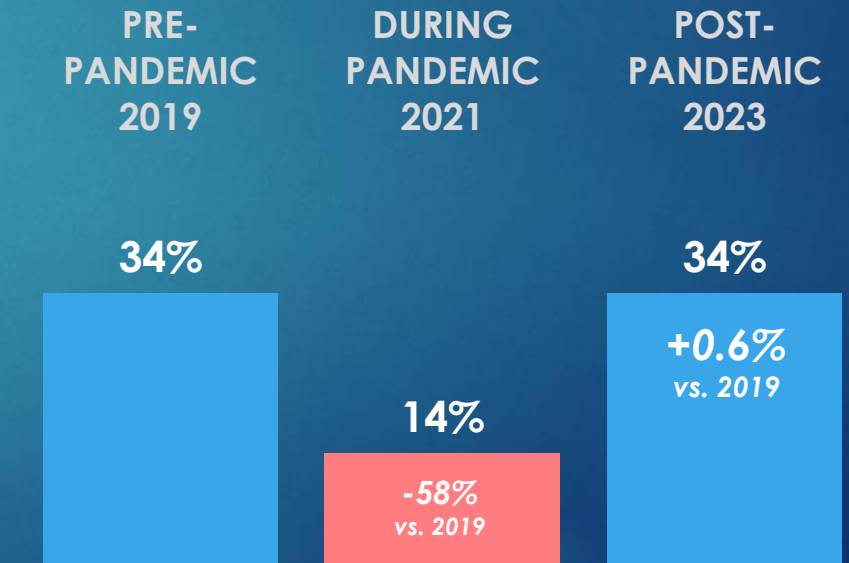
Incidence of travel declined markedly among those who had been traveling in 5 days a week before the pandemic. However, the drop off in incidence of travel is greater (and the rebound is less) among those who had been traveling only 1-4 days a week back in 2019.

- Notably, the falloff among former travelers is offset by a **projected commencement of travel into the CBD** among those who were not coming in at all in 2019 (mostly among younger people).

The decline during the pandemic vs. 2019 was greatest and the predicted 2023 rebound is least robust among 55+ year olds, though there was a much lower incidence of travel to the CBD among this group to begin with. Off-setting the decline among the older age group, those in the youngest age group expect to travel in more post-pandemic than they did in 2019 (+11%).

Incidence of Regional Travel to the NYC CBD on a Typical Spring Weekday
By Pre-Pandemic Travel and Age

	PRE-PANDEMIC 2019 WEEKDAY TRAVEL TO CBD			CURRENT AGE		
	5 days per week (A) 196	1-4 days (B) 232	None or < 1 day (C) 839	18-34 (D) 400	35-54 (E) 427	55+ (F) 440
Weighted Base: Total						
Travel below 60th Street in…						
Spring of 2019	100%	100%	-	42% F	43% F	17%
Spring of 2021	49% BC	30% C	1%	20% F	18% F	5%
Spring of 2023	90% BC	80% C	8%	47% F	42% F	15%
No travel below 60th Street	-	-	91%	48%	53%	80% DE
Percentage change 2021 vs. 2019	-51%	-70%		-53%	-59%	-71%
Percentage change 2023 vs. 2019	-10%	-20%		11%	-2%	-15%

Some who didn't travel in before the pandemic will start doing so after it is over

More in the youngest age group expect to travel in, post-pandemic

Indicates significantly higher than comparison group indicated by letter at the 95% confidence level.

The top reason for entering the CBD during a typical Spring weekday is **Work,** followed by Leisure. Predicted travel in for Leisure increases significantly post-pandemic.

There was some adjustment in the time of day they entered the CBD during the pandemic, particularly during 7:00 AM to 9:59 AM (44% pre-pandemic vs. 32% during the pandemic). Time of day patterns are predicted to shift back to normal post-pandemic.

Main Reason to Enter the Hub on a Typical Spring Weekday

Weighted Base: Travel in Spring of Year	PRE-PANDEMIC 2019 (A) 428	DURING PANDEMIC 2021 (B) 178	POST-PANDEMIC 2023 (C) 431
Work	57%	55%	52%
Leisure (shopping, dining, etc.)	31%	28%	37% B
School	7%	8%	6%
Medical	5%	9%	5%
Other main reason	0%	0%	1%

Time Typically Entering the Hub on a Typical Spring Weekday

Weighted Base: Travel in Spring of Year	PRE-PANDEMIC 2019 (A) 428	DURING PANDEMIC 2021 (B) 178	POST-PANDEMIC 2023 (C) 431
4:00 AM – 6:59 AM	5% C	8% C	2%
7:00 AM – 9:59 AM	44% B	32%	42% B
10:00 AM – 2:59 PM	26%	37% A	29%
3:00 PM – 6:59 PM	15%	17%	17%
7:00 PM – 9:59 PM	7% B	2%	8% B
10:00 PM – 3:59 AM	3%	4%	2%

Indicates significantly higher than comparison group indicated by letter at the 95% confidence level.

Trips into the CBD are not predicted to fully rebound post-pandemic for the Subway, Railroad, and Buses. On the other hand, Ferry, Auto, Walking, and Biking are predicted to rebound well above 2019 levels.

An increase of approximately 106,000 trips via Auto based on the number of people translate to around 85,000 more vehicles entering the CBD in 2023 versus 2019.

Projected Number of Persons Entering The Hub on a Typical Spring Weekday

	PRE-PANDEMIC 2019	DURING PANDEMIC 2021	POST-PANDEMIC 2023	2021 vs. 2019		2023 vs. 2019	
				# Change	% Change	# Change	% Change
Weighted Base: Travel in Spring of Year	428	178	431				
TOTAL	**3,898,268**	**1,290,580**	**3,579,489**	**-2,607,688**	**-67%**	**-318,779**	**-8%**
Public Transportation (NET)	**2,846,002**	**718,199**	**2,323,462**	**-2,127,803**	**-75%**	**-522,540**	**-18%**
Subway	2,185,893	499,509	1,727,964	-1,686,385	-77%	-457,929	-21%
Railroad	328,511	60,872	275,613	-267,638	-81%	-52,898	-16%
Bus	282,323	89,581	245,436	-192,742	-68%	-36,888	-13%
Ferry	49,275	68,237	74,450	18,961	38%	25,175	51%
Auto	**910,565**	**456,977**	**1,016,661**	**-453,588**	**-50%**	**106,096**	**12%**
Walk only	**115,252**	**80,330**	**133,602**	**-34,922**	**-30%**	**18,350**	**16%**
Bike	**26,449**	**35,075**	**105,763**	**8,626**	**33%**	**79,314**	**300%**
Projected # of Vehicles *(assuming 1.25 people per vehicle)*	**728,452**	**365,581**	**813,329**	**-362,871**	**-50%**	**84,877**	**12%**

Projected number of persons entering Manhattan below 60th Street calculated off the share of mode, the proportion of weighted number of respondents entering the survey (regardless of whether they traveled into the CBD) in relation to the US Census, divided by 5 to take into account one typical weekday.
Railroad includes Metro-North Railroad, Long Island Rail Road, NJ Transit Rail, PATH, and Amtrak; Bus includes MTA, NJ Transit, Other Bus/Shuttle; Auto includes Personal Vehicles & Car Services
Projected number of vehicles is calculated assuming 1.25 people per vehicle according to the NYMTC Hub Bound Travel Data for 2019. The same factor was applied to 2021 and 2023 projections. While this is the best factor to use at the moment, it is likely that it should be somewhat different due to the pandemic.
NOTE: Use caution when interpreting small base sizes/modes

The proportion of travelers into the CBD still using Public Transportation dropped during the pandemic to 56% compared to 73% in 2019, whereas Auto use increased (35% 2021 vs 23% 2019). Anticipated usage of Public Transportation in a post-pandemic 2023 remains lower than it was in 2019 (65% 2023), and anticipated Auto use remains higher (28% 2023).

Modes Used to Enter the Hub on a Typical Spring Weekday
Calculated Share of Trips

	PRE-PANDEMIC 2019	DURING PANDEMIC 2021	POST-PANDEMIC 2023	2021 vs. 2019	2023 vs. 2019
	(A)	(B)	(C)		
Weighted Base: Travel in Spring of Year	1562	517	1434		
Public Transportation (NET)	73% BC	56%	65% B	-24%	-11%
Subway	56% BC	39%	48% B	-31%	-14%
Railroad	8% BC	5%	8% B	-44%	-9%
Bus	7%	7%	7%	-4%	-5%
Ferry	1%	5% AC	2%	318%	65%
Auto	23%	35% AC	28% A	52%	22%
Walk only	3%	6% AC	4%	111%	26%
Bike	1%	3% A	3% A	301%	335%

Indicates significantly higher than comparison group indicated by letter at the 95% confidence level.
Number of times using modes to enter Manhattan below 60th Street were asked for a typical 5-day Spring week (Mondays-Fridays) within the three timeframes if traveled/traveling during that timeframe. Percentage is mode share of trips calculated off the volume of total trips.
Railroad includes Metro-North Railroad, Long Island Rail Road, NJ Transit Rail, PATH, and Amtrak; Bus includes MTA, NJ Transit, Other Bus/Shuttle; Auto includes Personal Vehicles & Car Services

About a third of those traveling to the CBD in both 2019 and 2023 say they expect to use public transit less in 2023. Work pattern changes and safety from the virus and crime are all factors in the projected decline. Based on strong agreement, the top factor is working more from home.
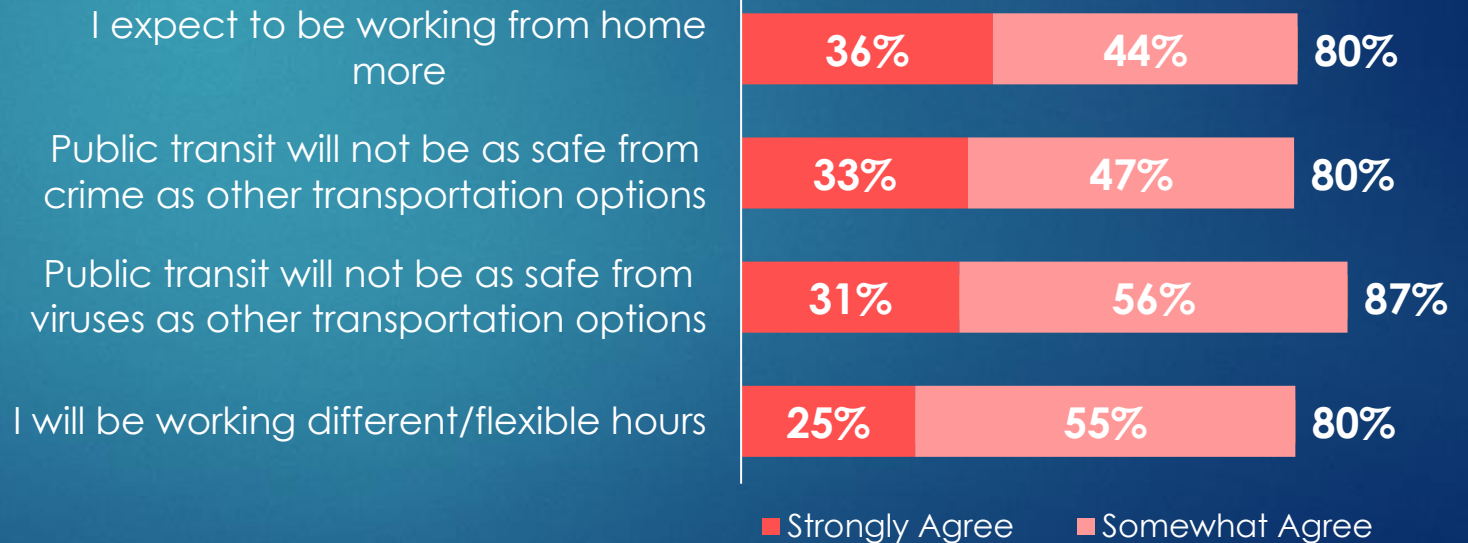
Use of Public Transit in 2023 vs. 2019 to Enter the Hub During the Weekdays
Weighted Base: Traveling in 2019 and 2023, N=362

■ Will use public transit less

34%

■ Will use public transit about the same

41%

■ Will use public transit more

24%
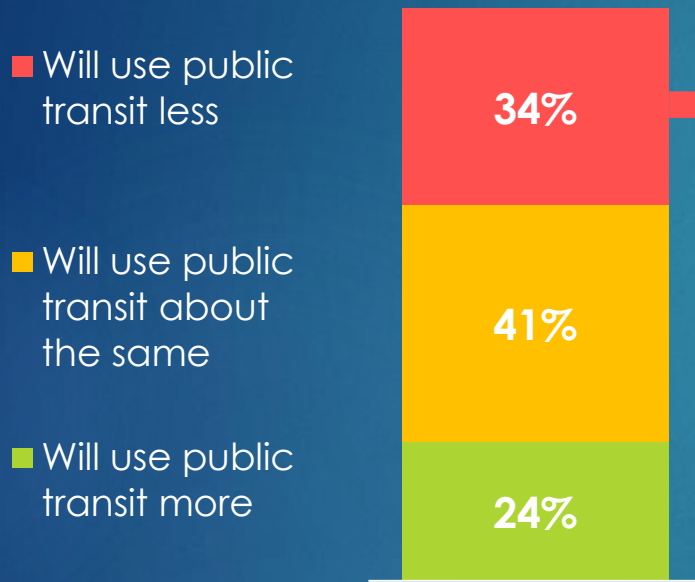
Reasons for Expecting to Take Public Transit Less After the Pandemic is Over
Strongly or Somewhat Agree on a 4-point scale
Base: Among Those That will Use Public Transit Less in 2023, N=124

I expect to be working from home more — **36%** | **44%** | 80%

Public transit will not be as safe from crime as other transportation options — **33%** | **47%** | 80%

Public transit will not be as safe from viruses as other transportation options — **31%** | **56%** | 87%

I will be working different/flexible hours — **25%** | **55%** | 80%
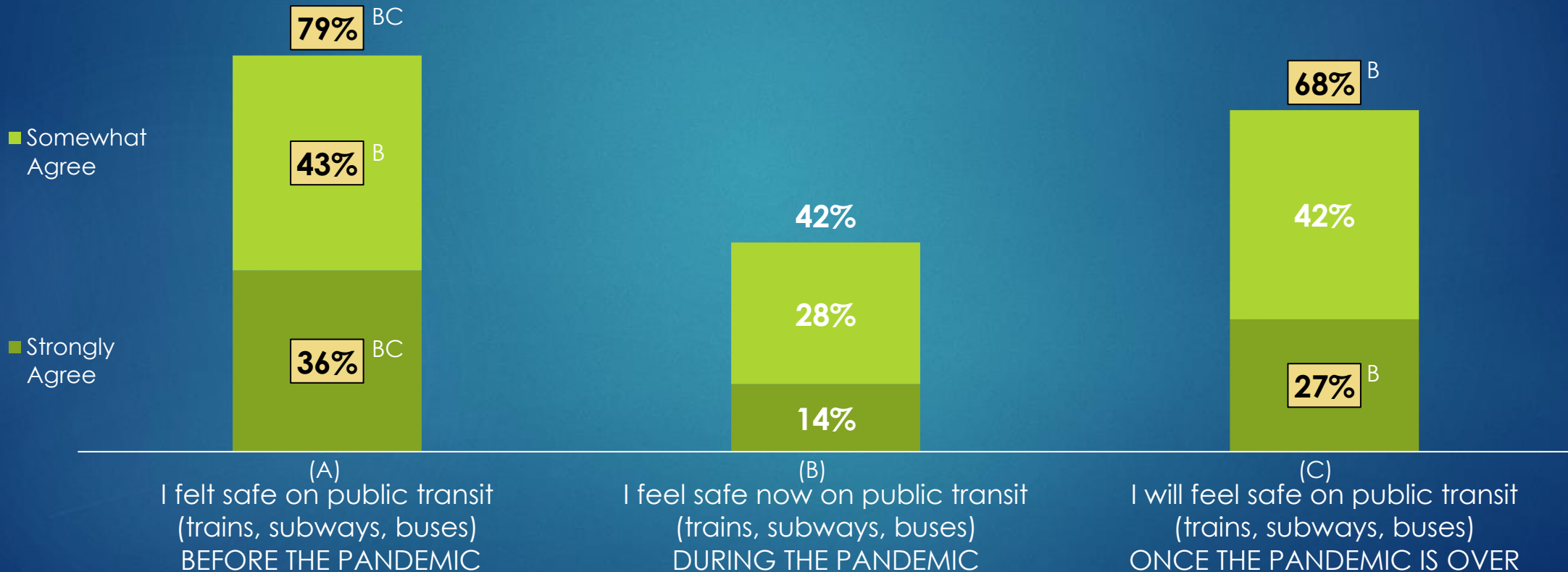
■ Strongly Agree ■ Somewhat Agree

Safety is a factor in public transit ridership during the pandemic. But post-pandemic, most people believe they will return to feeling safe on public transit again, though not quite as many as before the pandemic.

Opinions Regarding Safety on Public Transit
Strongly or Somewhat Agree on a 4-point scale
Weighted Base: Total Travelers, N=500

■ Somewhat Agree

■ Strongly Agree

79% BC

43% B

36% BC

42%

28%

14%

68% B

42%

27% B

(A)
I felt safe on public transit
(trains, subways, buses)
BEFORE THE PANDEMIC

(B)
I feel safe now on public transit
(trains, subways, buses)
DURING THE PANDEMIC

(C)
I will feel safe on public transit
(trains, subways, buses)
ONCE THE PANDEMIC IS OVER

Indicates significantly higher than comparison group indicated by letter at the 95% confidence level.

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Just under six in ten (57%) feel some types of public transit will be safer than others after the pandemic. Commuter Rail Trains will be safe (76%), followed by Buses (71%), with Subways lagging(63%) though this is more driven by crime concerns than virus concerns.

Some Types of Public Transit Will Be Safer Than Others After the Pandemic
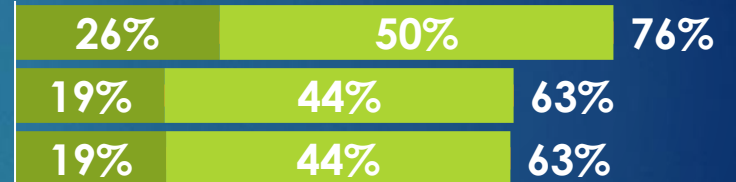Weighted Base: Travelers, N=500

Yes 57%

No 43%
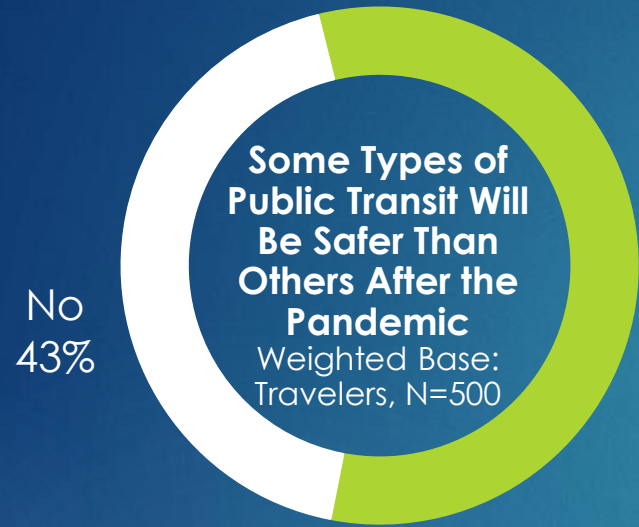
Public Transit Safety Post-Pandemic
Strongly or Somewhat Agree on a 4-point scale
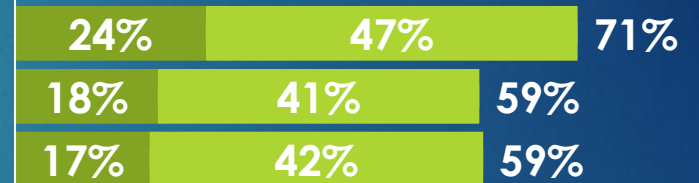Weighted Base: Feel Some Types Will be Safer Than Others, N=283

	Strongly Agree	Somewhat Agree	NET
Commuter Rail Trains will be safe (NET)	26%	50%	76%
from viruses	19%	44%	63%
from crime	19%	44%	63%
Buses will be safe (NET)	24%	47%	71%
from viruses	18%	41%	59%
from crime	17%	42%	59%
Subways will be safe (NET)	24%	39%	63%
from viruses	19%	37%	56%
from crime	15%	31%	46%
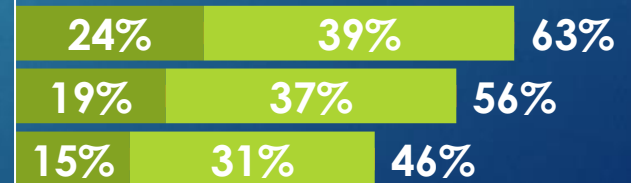
■ Strongly Agree ■ Somewhat Agree

Among people still travelling to the CBD weekly during the pandemic (2021) there is a shift away from Full-Time Employment and towards Part-Time Employment or Unemployment.

For employed travelers who still came into the CBD during the pandemic, the average number of days working remotely increased significantly in 2021 during the pandemic, while in person work decreased significantly. Workers predict that the remote option will endure after the pandemic. Though employees feel their employers wouldn't allow as much as they would prefer, the average number of days will still be higher than it was before the pandemic.

Employment Status of Travelers to the CBD

	PRE-PANDEMIC 2019 (A)	DURING PANDEMIC 2021 (B)	POST-PANDEMIC 2023 (C)
Weighted Base: Travel in Spring of Year	428	178	431
Employed (NET)	82%	80%	83%
Employed Full-Time (35+ hrs/week)	68% B	58%	68% B
Employed Part-Time	10%	16% AB	8%
Self-employed	5%	6%	7%
Full-Time Student	8% B	4%	5%
Unemployed	5%	11% AB	5%
Retired	3%	2%	5% B
Homemaker	2%	3%	2%

Average # of Weekdays Working Either Remotely or In Person

	PRE-PANDEMIC 2019 (A)	DURING PANDEMIC 2021 (B)	POST-PANDEMIC 2023 Personal Preference (C)	POST-PANDEMIC 2023 Allowed by Employer (D)
Weighted Base: Travel & Employed	352	142	357	357
Work Remotely	0.9	2.0 A	2.1 AD	1.6 A
Work In Person	3.5 BCD	2.1	2.5	2.8 B

Indicates significantly higher than comparison group indicated by letter at the 95% confidence level.

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TRAVELER PROFILES

Traveler Demographic Profile

	TRAVEL BELOW 60th STREET DURING A TYPICAL SPRING WEEKDAY		
	PRE-PANDEMIC 2019	DURING PANDEMIC 2021	POST-PANDEMIC 2023
	(A)	(B)	(C)
Weighted Base: Travel in Spring of Year	428	178	431
GENDER			
Male	50%	57% AC	50%
Female	49%	43%	50%
Non-binary	1%	-	1%
AGE			
18 - 34	40%	45%	44% A
35 - 54	43%	42%	41%
55+	18% C	13%	15%
RACE/ETHNICITY			
White/Caucasian	39%	42%	37%
Black/African American	21%	25%	21%
Hispanic/Latino/Latina/Latinx	19%	21%	21%
All Others (NET)	20% B	13%	21% B
Asian/Pacific Islander	17% B	12%	16%
Middle Eastern/North African	1%	1%	1%
Indigenous/Native/American Indian	0%	-	0%
Other race/ethnicity	2% B	1%	3% BC

Traveler COVID Profile

	TRAVEL BELOW 60th STREET DURING A TYPICAL SPRING WEEKDAY		
	PRE-PANDEMIC 2019 (A)	DURING PANDEMIC 2021 (B)	POST-PANDEMIC 2023 (C)
Weighted Base: Travel in Spring of Year	428	178	431
EVER HAD COVID-19			
Have had COVID-19	15%	20%	17%
Have not had COVID-19	84%	79%	82%
Prefer not to answer	1%	1%	1%
VACCINATION STATUS			
Vaccinated or Plan to Get Vaccinated (NET)	87%	85%	86%
Fully or partially vaccinated	68%	62%	67%
Not yet, but plan to get vaccinated	18%	23%	19%
Not planning to get vaccinated	11%	13%	11%
Prefer not to answer	3%	2%	3%

Traveler Residential Location

	TRAVEL BELOW 60th STREET DURING A TYPICAL SPRING WEEKDAY		
Weighted Base: Travel in Spring of Year	PRE-PANDEMIC 2019 (A)	DURING PANDEMIC 2021 (B)	POST-PANDEMIC 2023 (C)
	428	178	431
New York (NET)	**74%** C	**78%** C	**66%**
New York City (SUBNET)	63% C	72% AC	55%
New York (Manhattan) (SUB-SUBNET)	19%	27% AC	16%
Below 60th Street	8% C	15% AC	4%
Above 60th Street	10%	12%	12%
Other NYC Boroughs (SUB-SUBNET)	45% C	44%	38%
Bronx	9%	10%	9%
Queens	17%	15%	15%
Kings (Brooklyn)	18%	19%	13%
Richmond (Staten Island)	1%	-	1%
Other New York Counties	11%	7%	12% B
New Jersey	**19%**	**15%**	**21%** B
Connecticut	**6%**	**6%**	**7%**
County outside of NY, NJ, CT*	**0%**	**0%**	**2%** AB
Don't Know	**-**	**-**	**3%**

■ Indicates significantly higher than comparison group indicated by letter at the 95% confidence level.
* New York metropolitan area (New York, New Jersey, and Connecticut) residents were targeted for this survey. Those who reside outside the New York metropolitan area were allowed into the survey if they traveled at least one weekday into the CBD either in Spring 2019, Spring 2021, or anticipate travel in Spring 2023.