



What Will Stick?

Understanding the Impacts of COVID-19

Nico Larco

Director - Urbanism Next Center
Professor – Dept. of Architecture
University of Oregon
🐦 @nicolarco

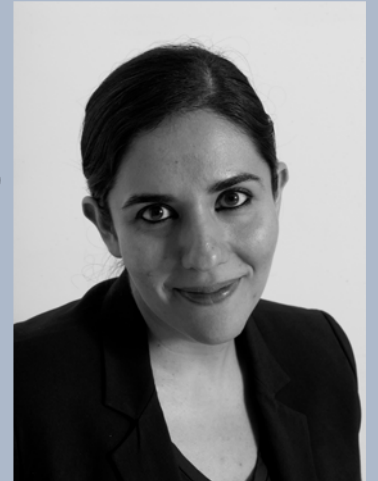
urbanismnext.org



Jyot Chadha

New Urban Mobility Alliance (NUMO)
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numo.global



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Center

September 30, 2020



WHAT WILL STICK?

PERFECTING POLICY WITH PILOTS

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Institute
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AIA
Oregon



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Institute



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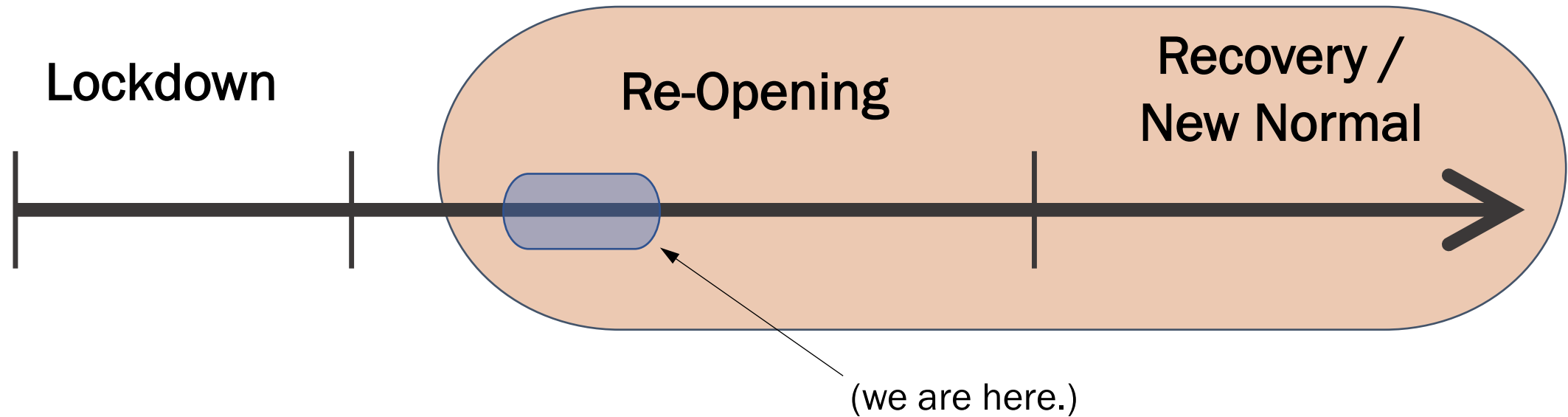
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COVID-19



URBANISM NEXT | FRAMEWORK

Forces of Change

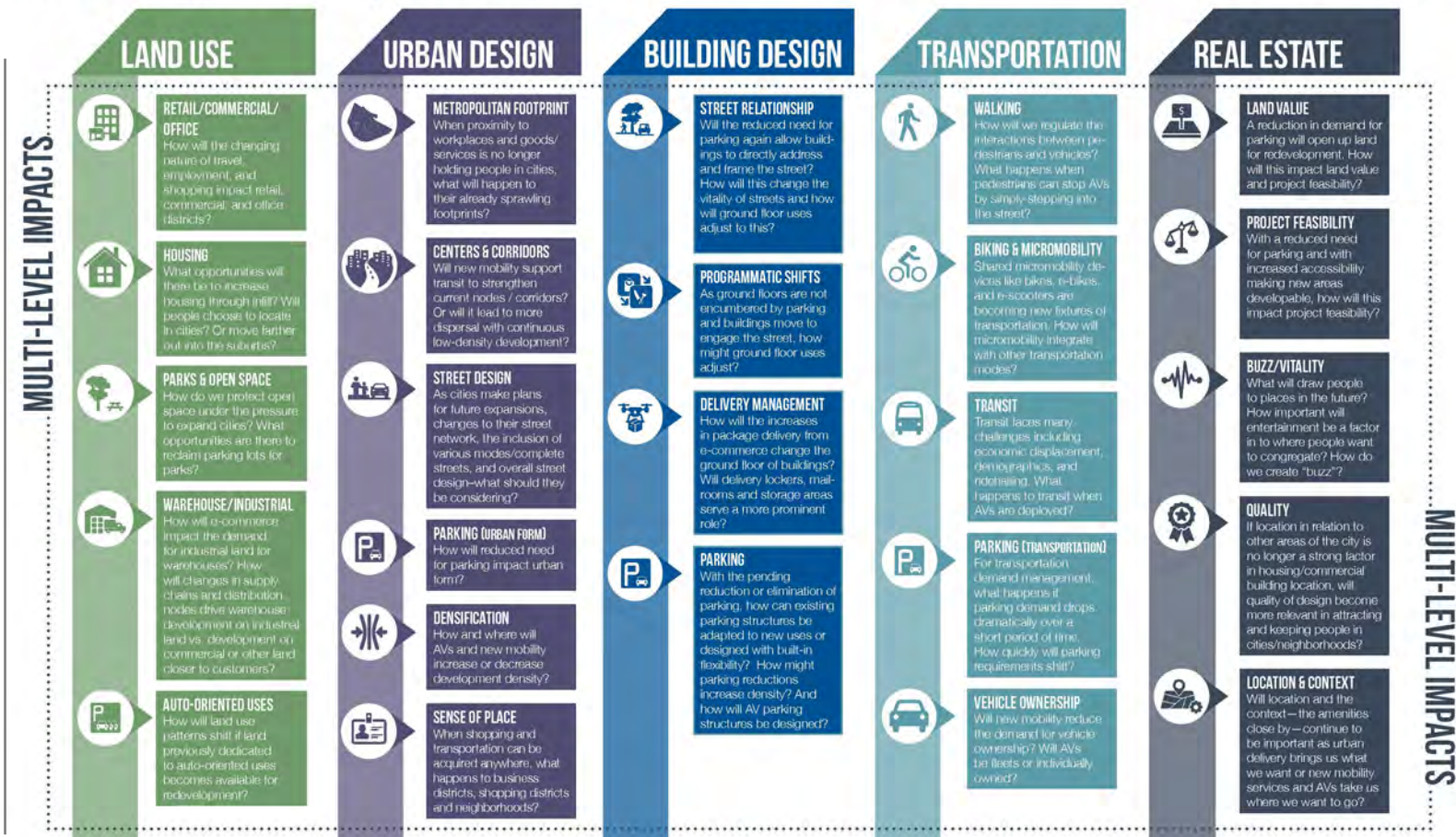
New Mobility

Autonomous Vehicles

E-Commerce

Urban Delivery

COVID-19



Implications

Equity
Health & Safety
Environment
Economy

What to Do?

Governance
Design
Education & Outreach
Research

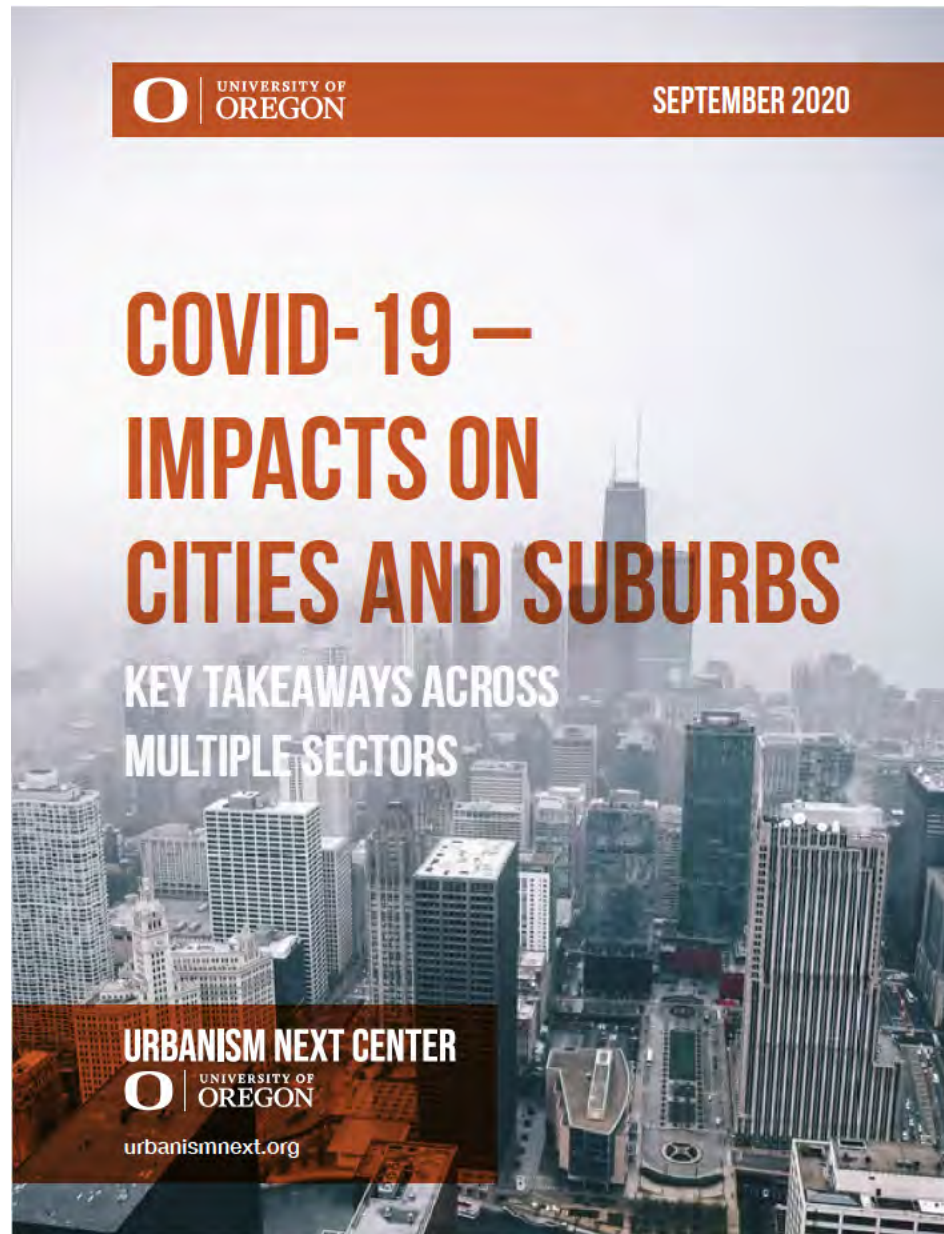
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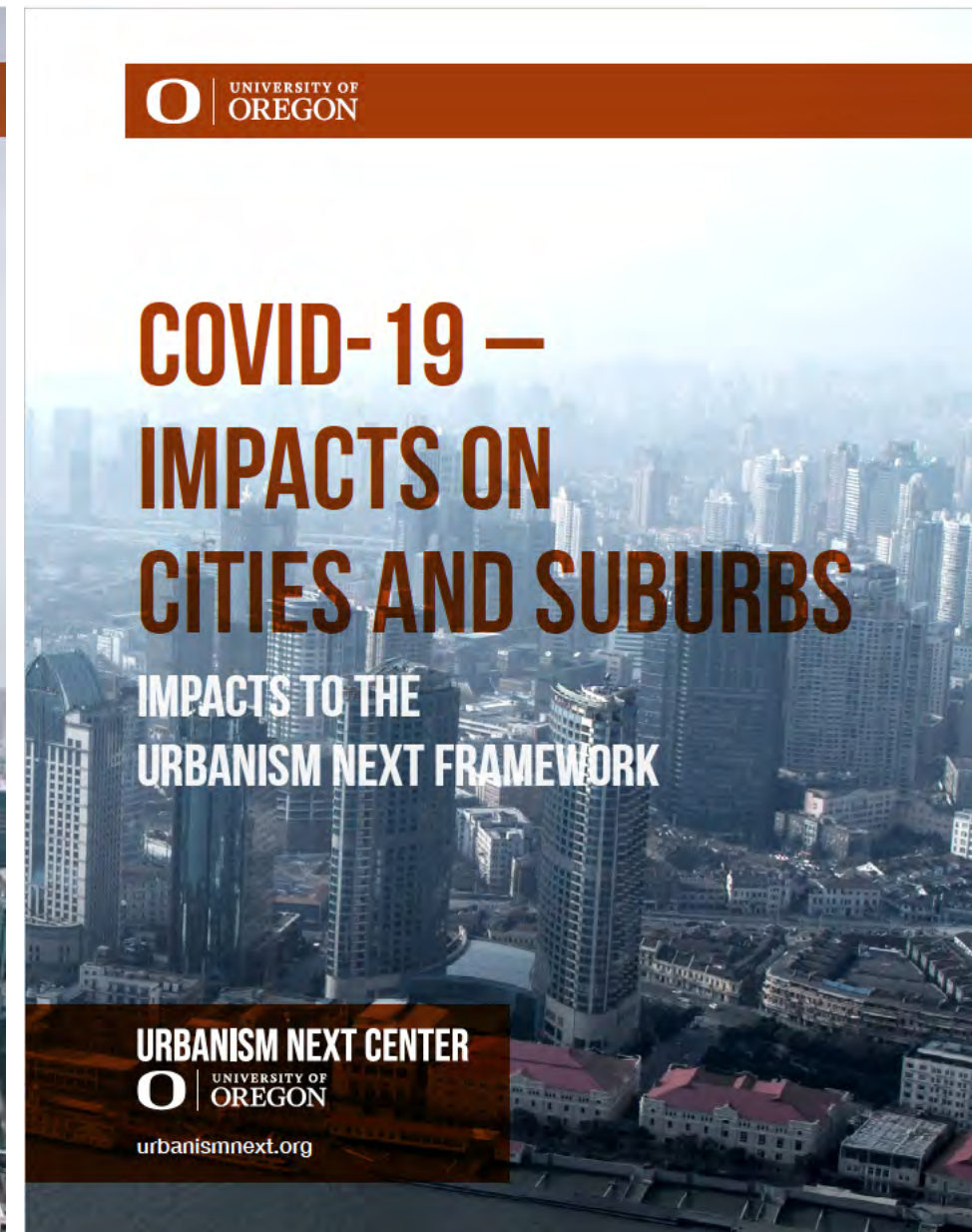
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Impacts of COVID Webinar - Sept. 30, 2020

Grace Kaplowitz
Nico Larco
Amanda Howell
Tiffany Swift
Matthew Stoll



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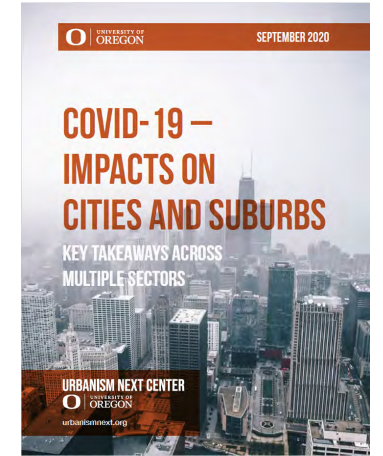


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COVID Impacts

Transportation

- Work From Home (WFH)
- Reduced Overall Transportation and Travel
 - Increased Driving alone
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- Reduced Public Transit Services Revenues
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- Reduced Interest in Passenger AV Tech
- Increased Interest in AV Delivery Devices



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Retail/Rest.

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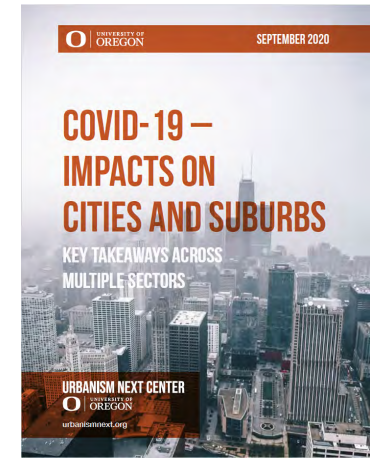
Maturity of Delivery Business Models

Increased Tactical Urbanism

Increased Goods and Meal Delivery

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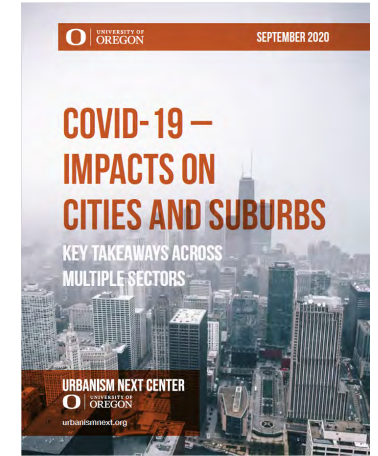
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Econ.

- Reduced Economic Activity
 - Small Businesses Closing
- Reduced Venture Capital Funding



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42%

of US Labor Force Working from Home Full Time

Stanford Institute for Economic Policy Research (SIEPR)
June 29, 2020

<https://news.stanford.edu/2020/06/29/snapshot-new-working-home-economy/>

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Impact of the COVID-19 recession on key economic indicators

53 very large metro areas with populations over 1 million

August 2020

Metro area	Labor market			Economic activity		
	Jobs	Unemp. rate	UI claims	Work trips ▼	Small biz hours	Small biz open
San Jose-Sunnyvale-Santa Clara, CA	-8.7%	+6.6%	N/A	-46.1%	-26.1%	-27.0%
San Francisco-Oakland-Berkeley, CA	-11.6%	+8.4%	N/A	-43.7%	-43.3%	-33.7%
Washington-Arlington-Alexandria, D...	-7.3%	+4.9%	N/A	-39.7%	-31.7%	-25.5%
Seattle-Tacoma-Bellevue, WA	-8.1%	+6.3%	N/A	-39.2%	-26.2%	-21.7%
Austin-Round Rock-Georgetown, TX	-4.0%	+3.9%	N/A	-38.5%	-18.8%	-16.2%
Boston-Cambridge-Newton, MA-NH	-11.4%	+12.8%	N/A	-36.7%	-24.7%	-23.5%
Raleigh-Cary, NC	-10.4%	+4.6%	N/A	-36.5%	-19.8%	-23.4%
New York-Newark-Jersey City, NY-NJ-...	-12.8%	+12.7%	N/A	-36.1%	-39.4%	-30.5%

<https://www.brookings.edu/interactives/metro-recovery-index/>

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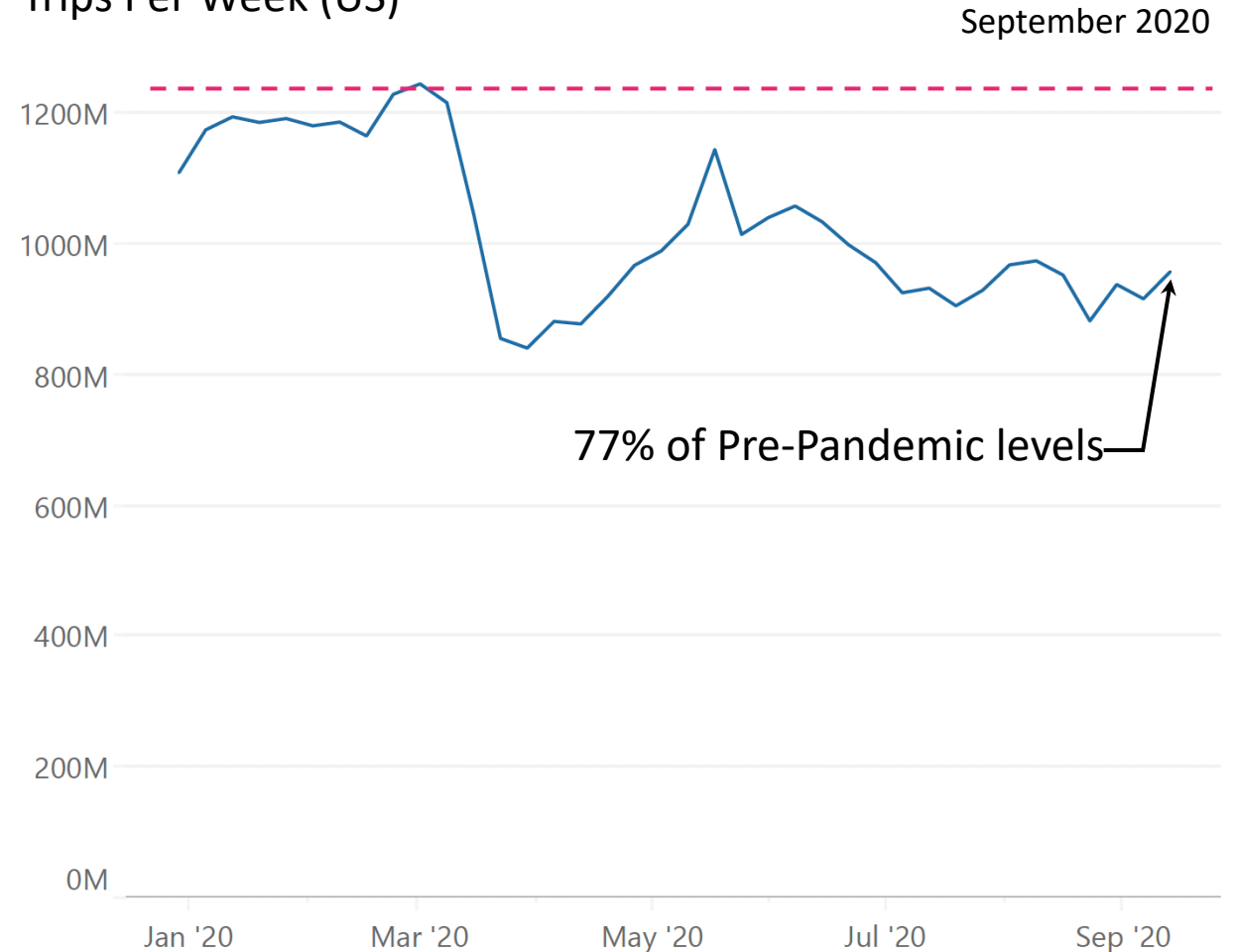
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Reduced Economic Activity

Small Businesses Closing

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Trips Per Week (US)



Bureau of Transportation Statistics, USDOT

<https://www.bts.gov/daily-travel>

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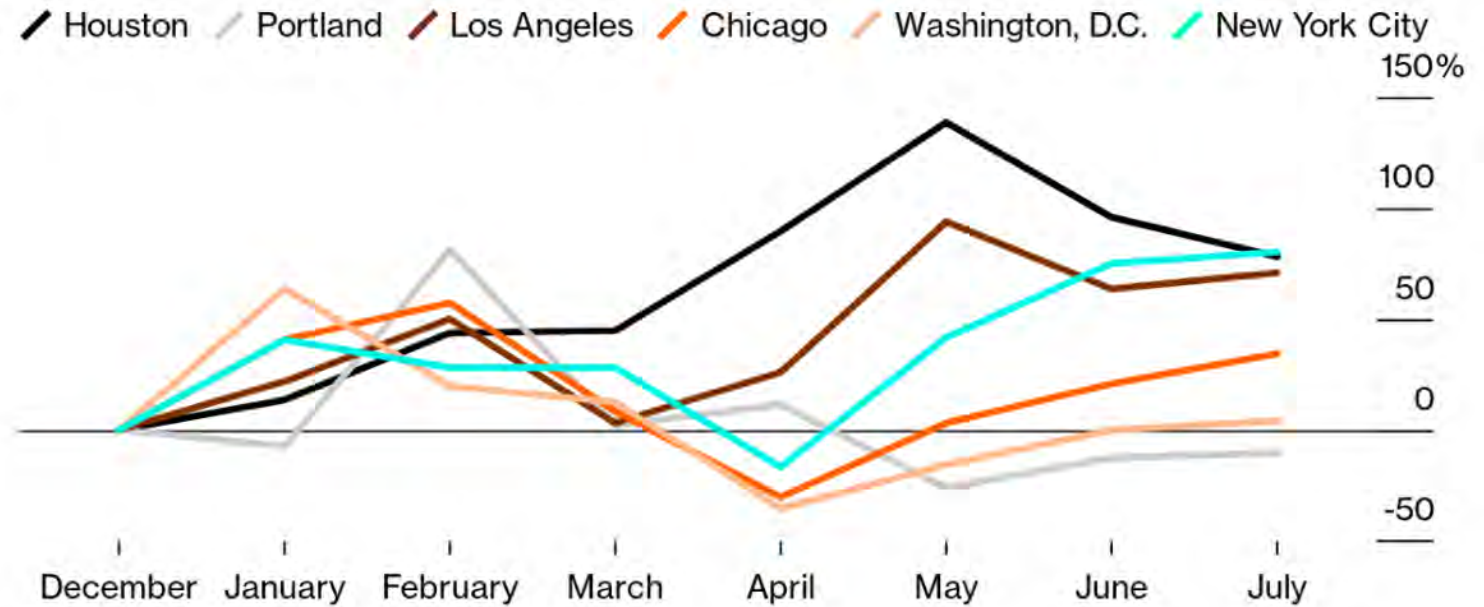
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A Boom Year For Bicycling

Bike trips on Strava surged during the pandemic in several U.S. cities



Data: Strava Metro
 Chart shows year-over-year percent change in Strava bicycle trips each month, 2019 vs 2020.

CITYLAB

<https://www.bloomberg.com/news/articles/2020-09-23/how-the-coronavirus-affected-biking-in-u-s-cities?sref=LOxEm0mA>

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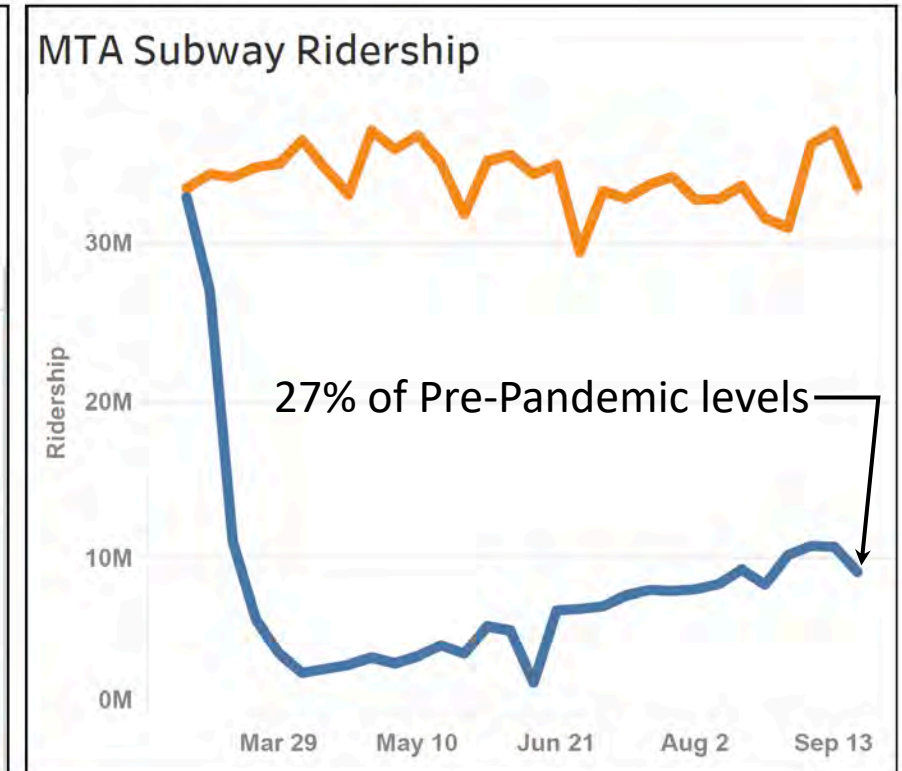
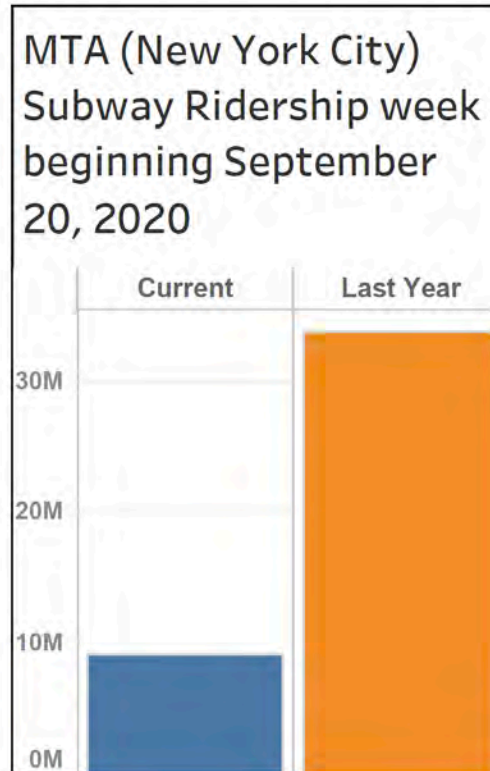
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September 2020



<https://www.bts.gov/covid-19/week-in-transportation#transit>

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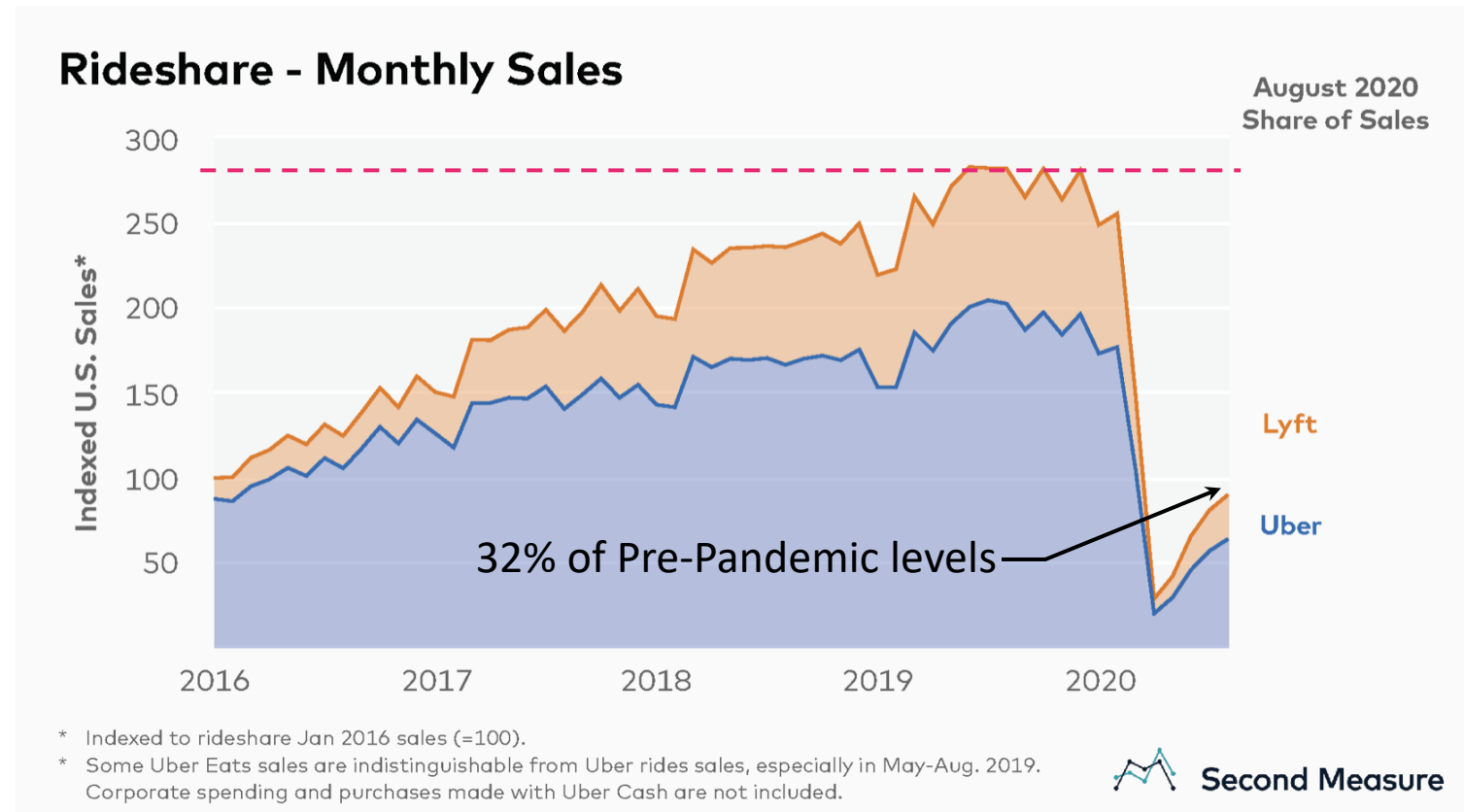
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<https://secondmeasure.com/datapoints/rideshare-industry-overview/>

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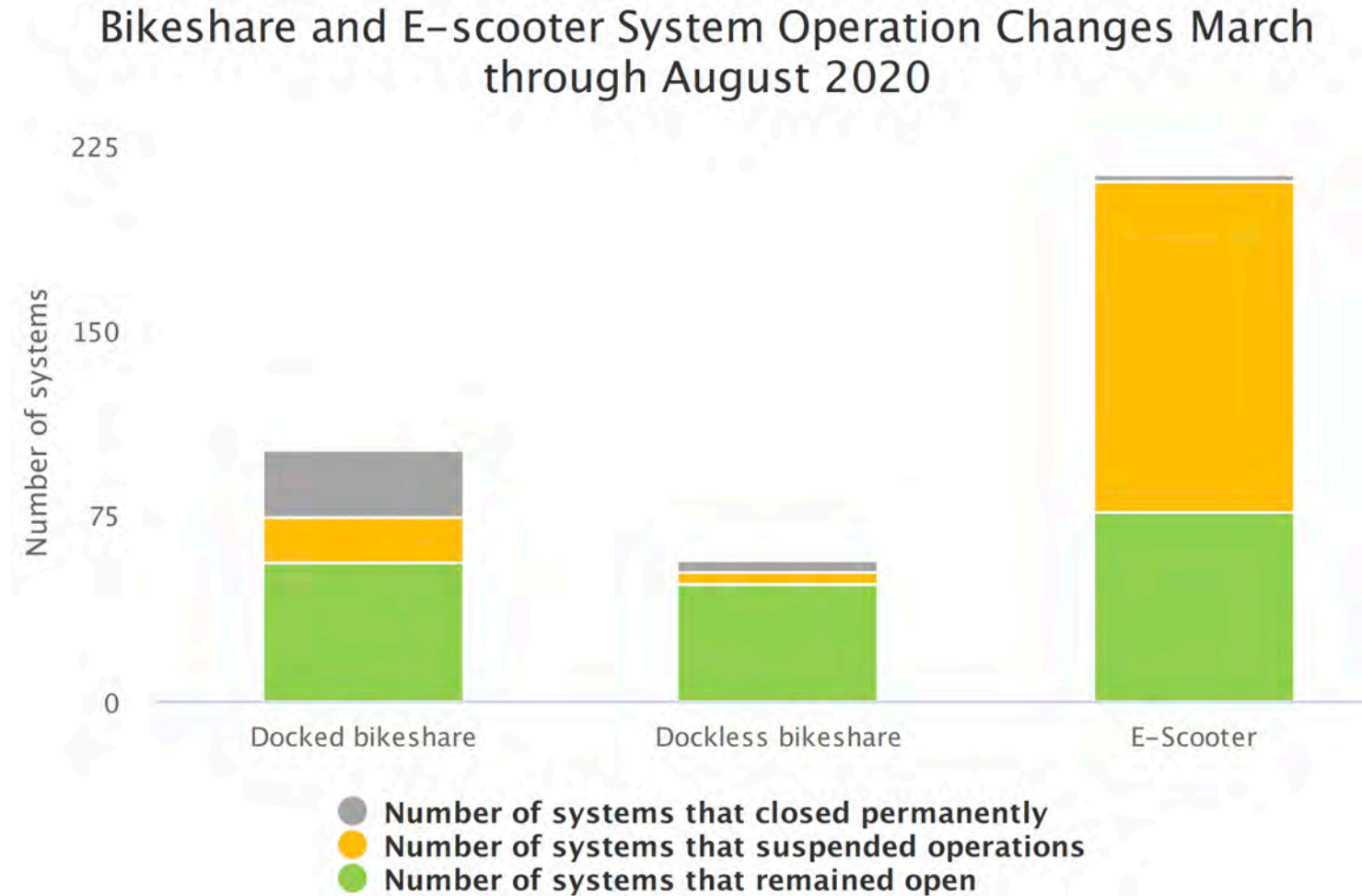
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<https://data.bts.gov/stories/s/Docked-and-Dockless-and-E-Scooter-System-Changes-2/kar5-6dnp/>

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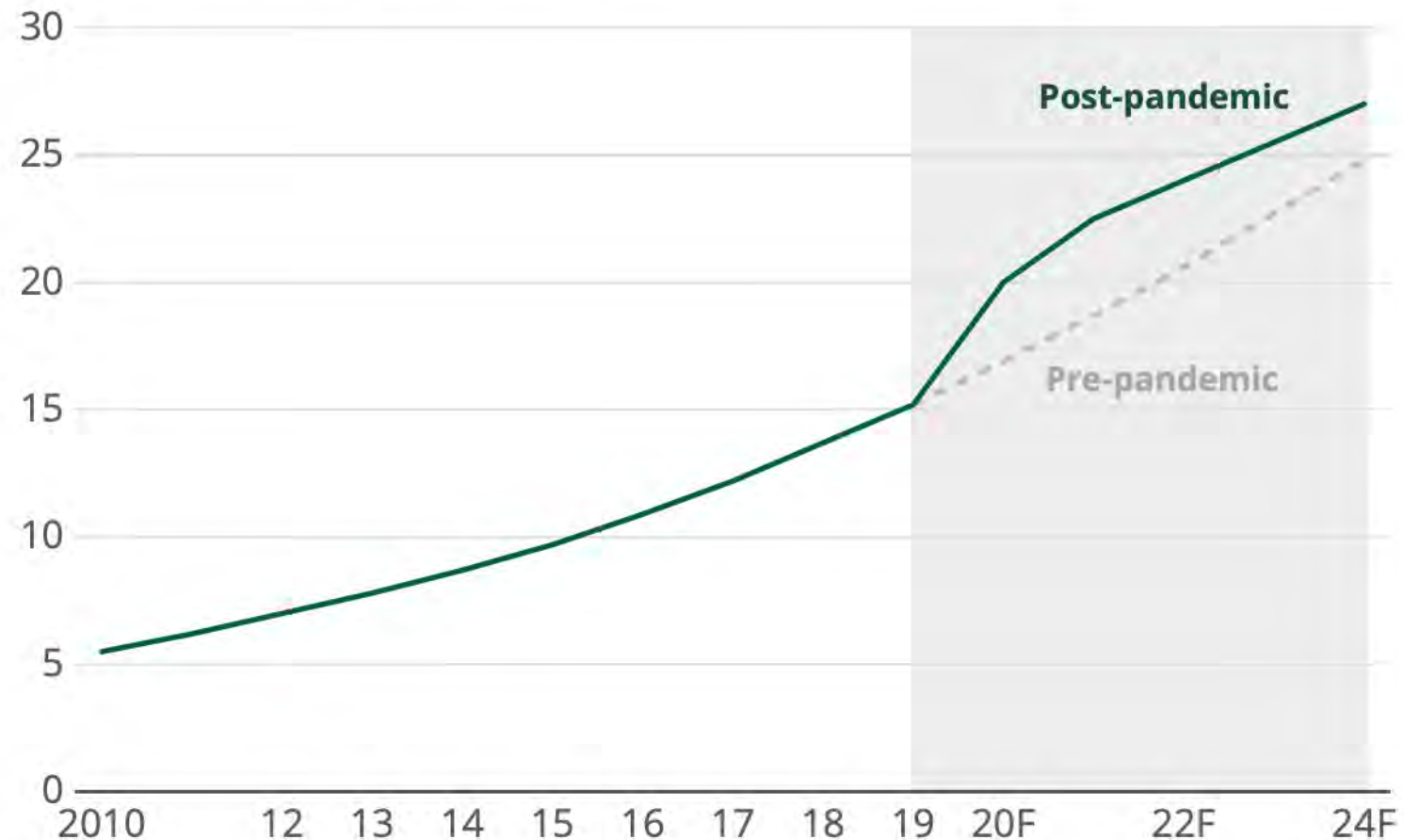
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E-COMMERCE SALES PENETRATION, UNITED STATES

E-Commerce as a % of Total Retail Sales



Source: U.S. Census Bureau, Euromonitor, Prologis Research forecast

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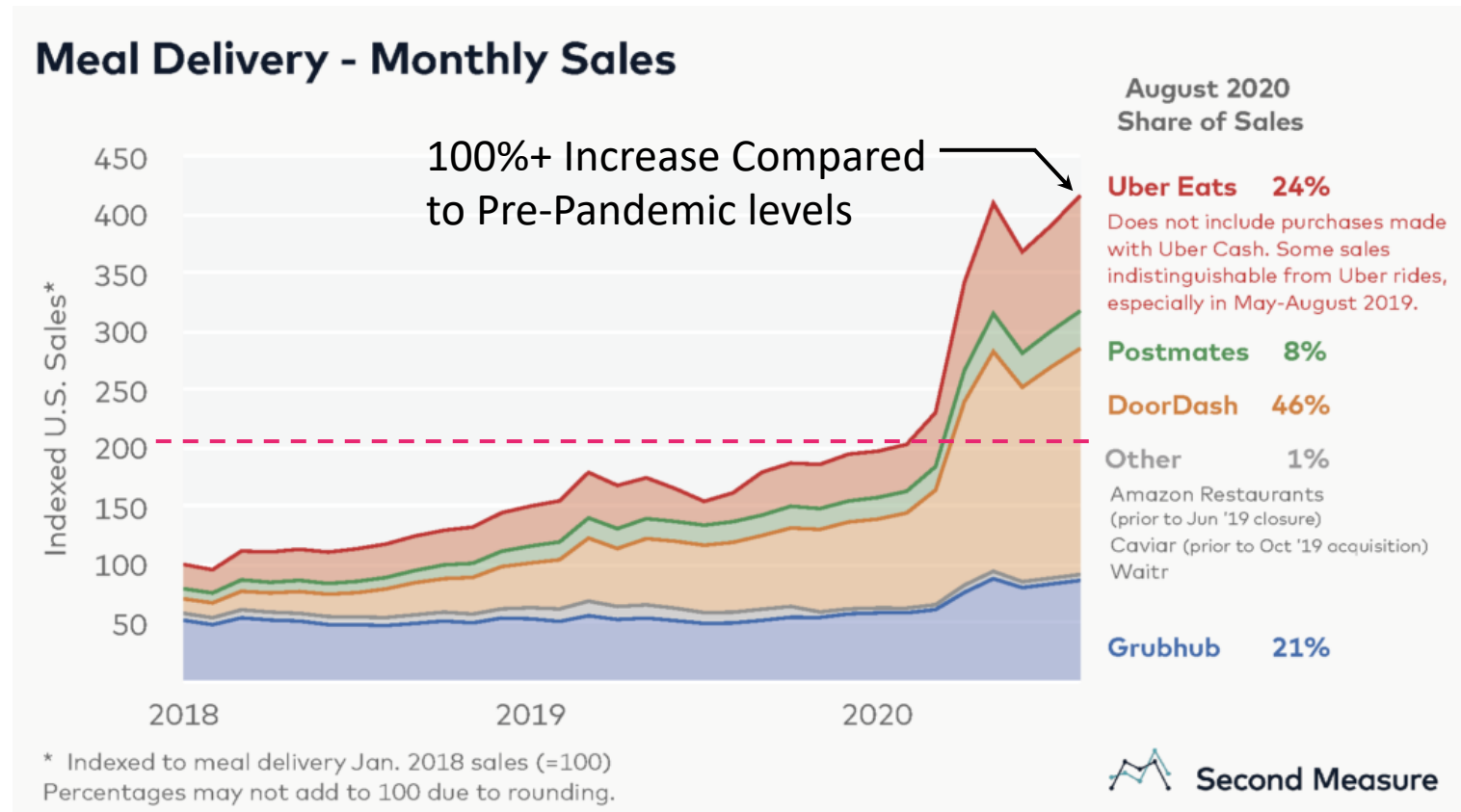
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<https://secondmeasure.com/datapoints/food-delivery-services-grubhub-uber-eats-doordash-postmates/>

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More than

100,000

restaurants and bars have
permanently closed due to COVID

National Restaurant Association Survey, July 2020

<https://restaurant.org/news/pressroom/press-releases/association-calls-for-needed-federal-support>

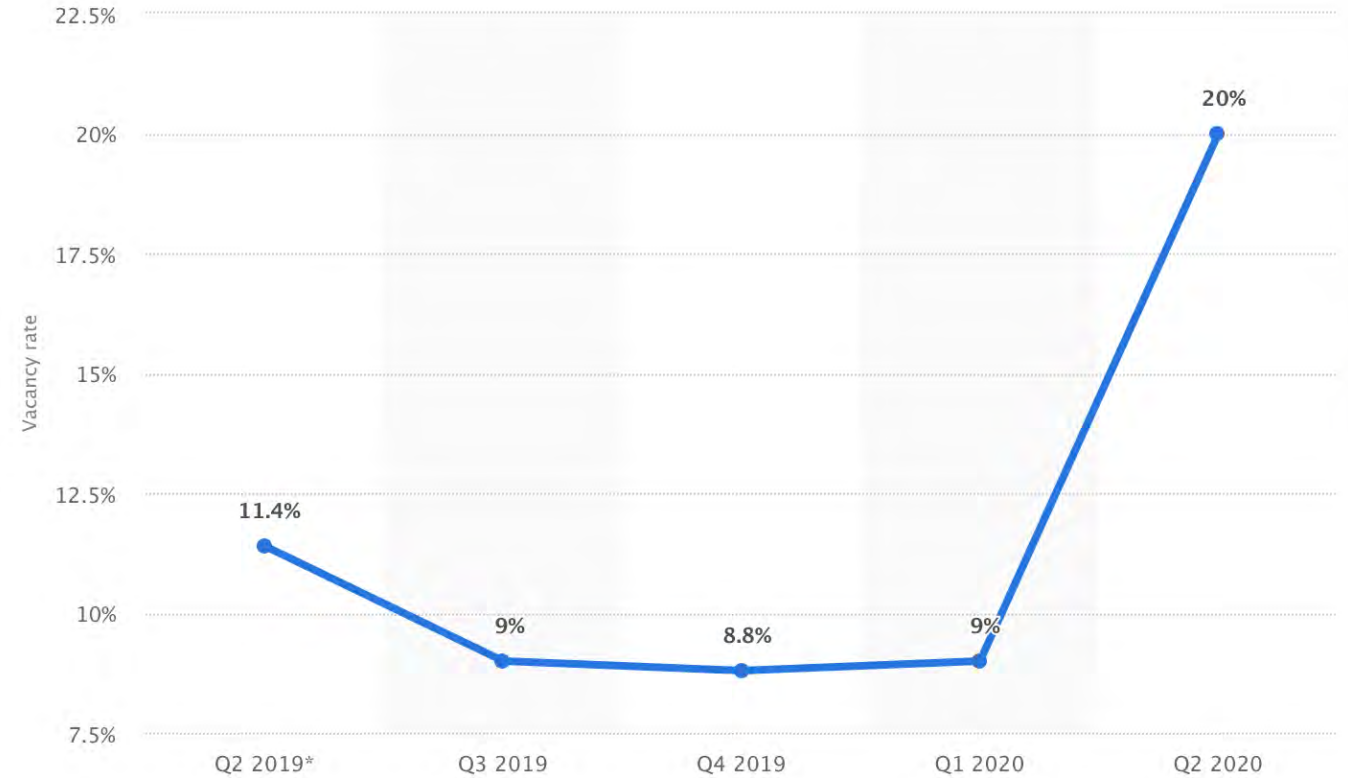
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Retail Vacancy Rates in the US (Q2-2019 to Q2 2020)



© Statista 2020

<https://www.statista.com/statistics/194102/us-retail-vacancy-rate-forecasts-from-2010/>

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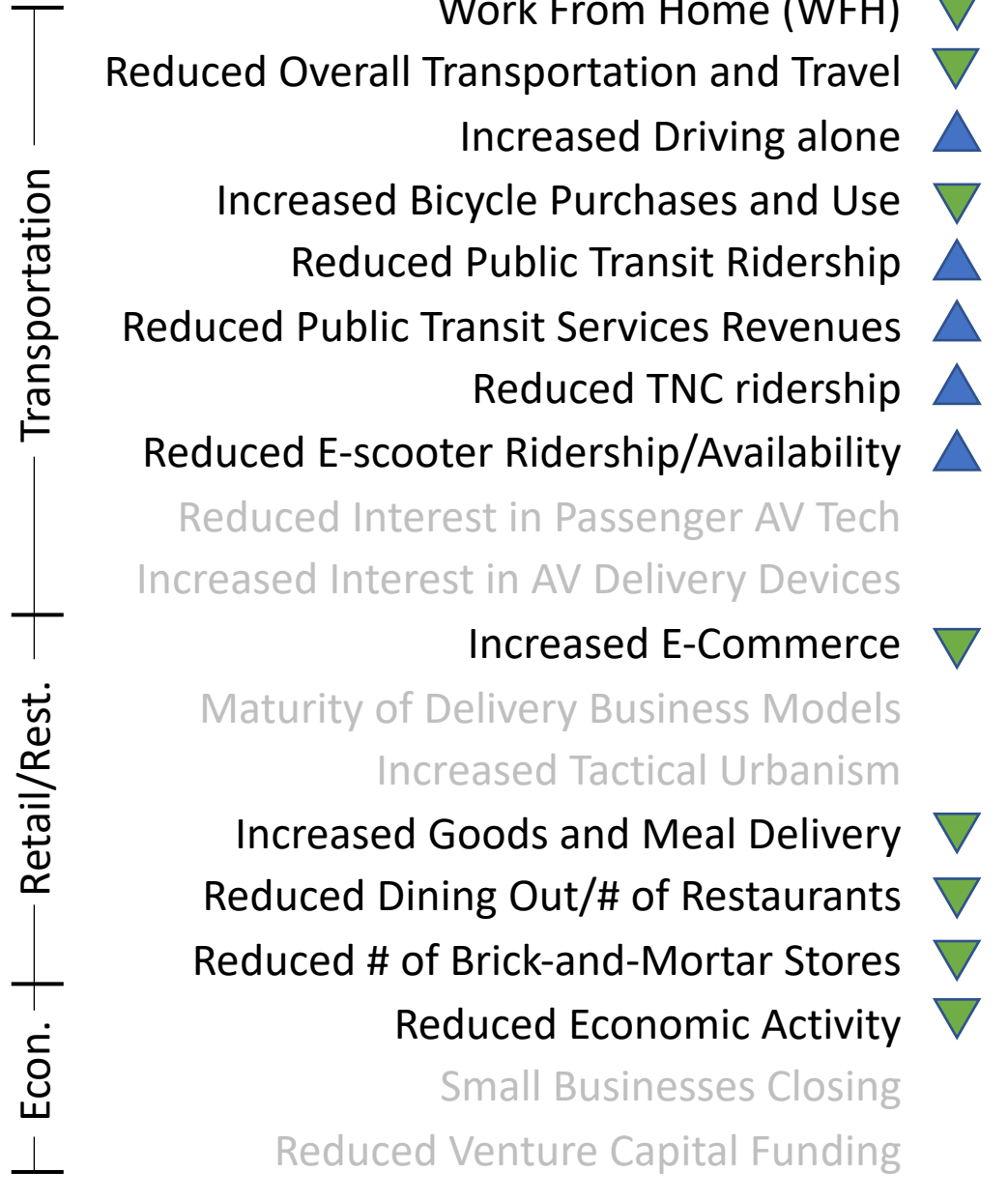
53 very large metro areas with populations over 1 million

August 2020

Metro area	Small biz hours	Small biz open ▼
San Francisco-Oakland-Berkeley, CA	-43.3%	-33.7%
New Orleans-Metairie, LA	-38.7%	-32.0%
New York-Newark-Jersey City, NY-NJ-...	-39.4%	-30.5%
Los Angeles-Long Beach-Anaheim, CA	-31.3%	-28.6%
Miami-Fort Lauderdale-West Palm Be...	-36.6%	-28.1%
Detroit-Warren-Dearborn, MI	-32.5%	-27.5%
San Jose-Sunnyvale-Santa Clara, CA	-26.1%	-27.0%
San Diego-Carlsbad, CA	-27.9%	-26.6%

<https://www.brookings.edu/interactives/metro-recovery-index/>

COVID Impacts



FIRST ORDER IMPACTS											KEY	
PARKING DEMAND	VEHICLE MILES TRAVELLED (VMT)	CONGESTION	EASE OF TRAVEL	SHIFT IN MODES	COMPETITION FOR R.O.W.	GOODS & MEAL DELIVERY	SHIFTING NATURE OF FREIGHT	DEMAND FOR WAREHOUSING SPACE	BRICK-AND-MORTAR STORES	INTEREST IN EXPERIENTIAL RETAIL		
▼	▼	▼	▲	▲		▲			▼		Work from home (WFH)	(+) INCREASED
▲	▲	▲	▼	▼	▲						Driving alone	
	▲	▲	▼		▲	▲	▲	▲	▼	▼	Goods and meal delivery	
						▲	▲				Maturity of delivery business model	
						▲	▲	▲	▼	▼	E-commerce	
▼	▼	▼	▲	▲	▲						Bicycle purchases and use	
▲			▲	▲	▲						Tactical urbanism	
						▲			▼	▼	Fear of crowded public space	
					▲		▲				Interest in automated delivery devices	
▼	▼	▼	▲	▼	▼	▲			▼		Transportation and travel	(-) DECREASED
▼	▼	▼	▲			▼	▼	▼	▼		Economic activity	
▼	▼	▼				▲			▼	▼	Dining out and number of restaurants	
▼					▼	▲	▼	▲	▼	▼	Number of brick-and-mortar stores	
▼					▼	▲	▼	▲	▼		Small businesses	
▲	▲	▲	▼	▼							Public transit ridership	
▲	▲	▲	▼	▲							Public transit services and revenues	
	▼	▼	▼	▲	▼						TNC ridership	
			▼	▲	▼						E-scooters and number of companies	
					▼		▲				Interest in passenger AV technology	
						▼					Venture capital funding	



URBANISM NEXT | FRAMEWORK

MULTI-LEVEL IMPACTS

LAND USE



RETAIL/COMMERCIAL/OFFICE

How will the changing nature of travel, employment, and shopping impact retail, commercial, and office districts?



HOUSING

What opportunities will there be to increase housing through infill? Will people choose to locate in cities? Or move farther out into the suburbs?



PARKS & OPEN SPACE

How do we protect open space under the pressure to expand cities? What opportunities are there to reclaim parking lots for parks?



WAREHOUSE/INDUSTRIAL

How will e-commerce impact the demand for industrial land for warehouses? How will changes in supply chains and distribution nodes drive warehouse development on industrial land vs. development on commercial or other land closer to customers?



AUTO-ORIENTED USES

How will land use patterns shift if land previously dedicated to auto-oriented uses becomes available for redevelopment?

URBAN DESIGN



METROPOLITAN FOOTPRINT

When proximity to workplaces and goods/services is no longer holding people in cities, what will happen to their already sprawling footprints?



CENTERS & CORRIDORS

Will new mobility support transit to strengthen current nodes / corridors? Or will it lead to more dispersal with continuous low-density development?



STREET DESIGN

As cities make plans for future expansions, changes to their street network, the inclusion of various modes/complete streets, and overall street design—what should they be considering?



PARKING (URBAN FORM)

How will reduced need for parking impact urban form?



DENSIFICATION

How and where will AVs and new mobility increase or decrease development density?



SENSE OF PLACE

When shopping and transportation can be acquired anywhere, what happens to business districts, shopping districts and neighborhoods?

BUILDING DESIGN



STREET RELATIONSHIP

Will the reduced need for parking again allow buildings to directly address and frame the street? How will this change the vitality of streets and how will ground floor uses adjust to this?



PROGRAMMATIC SHIFTS

As ground floors are not encumbered by parking and buildings move to engage the street, how might ground floor uses adjust?



DELIVERY MANAGEMENT

How will the increases in package delivery from e-commerce change the ground floor of buildings? Will delivery lockers, mail-rooms and storage areas serve a more prominent role?



PARKING

With the pending reduction or elimination of parking, how can existing parking structures be adapted to new uses or designed with built-in flexibility? How might parking reductions increase density? And how will AV parking structures be designed?

TRANSPORTATION



WALKING

How will we regulate the interactions between pedestrians and vehicles? What happens when pedestrians can stop AVs by simply stepping into the street?



BIKING & MICROMOBILITY

Shared micromobility devices like bikes, e-bikes, and e-scooters are becoming new fixtures of transportation. How will micromobility integrate with other transportation modes?



TRANSIT

Transit faces many challenges including economic displacement, demographics, and ridehailing. What happens to transit when AVs are deployed?



PARKING (TRANSPORTATION)

For transportation demand management, what happens if parking demand drops dramatically over a short period of time. How quickly will parking requirements shift?



VEHICLE OWNERSHIP

Will new mobility reduce the demand for vehicle ownership? Will AVs be fleets or individually owned?

REAL ESTATE



LAND VALUE

A reduction in demand for parking will open up land for redevelopment. How will this impact land value and project feasibility?



PROJECT FEASIBILITY

With a reduced need for parking and with increased accessibility making new areas developable, how will this impact project feasibility?



BUZZ/VITALITY

What will draw people to places in the future? How important will entertainment be a factor in to where people want to congregate? How do we create "buzz"?



QUALITY

If location in relation to other areas of the city is no longer a strong factor in housing/commercial building location, will quality of design become more relevant in attracting and keeping people in cities/neighborhoods?



LOCATION & CONTEXT

Will location and the context—the amenities close by—continue to be important as urban delivery brings us what we want or new mobility services and AVs take us where we want to go?

MULTI-LEVEL IMPACTS

LAND USE



RETAIL/
COMMERCIAL/
OFFICE



HOUSING



PARKS & OPEN
SPACE



WAREHOUSE/
INDUSTRIAL



AUTO-ORIENTED
USES

Store Closings and Office Space = Reduced Need for Zoned Land (?)



7,500

Store Closings to Date

On path for 2020 to have most
store closings in history.

Business Insider, September 2020

<https://www.businessinsider.com/stores-closing-in-2020-list-2020-1>

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LAND USE



RETAIL/
COMMERCIAL/
OFFICE



HOUSING



PARKS & OPEN
SPACE



WAREHOUSE/
INDUSTRIAL



AUTO-ORIENTED
USES

Store Closings and Office Space = Reduced Need for Zoned Land (?)



?

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HOUSING



PARKS & OPEN
SPACE




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INDUSTRIAL



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USES

Continued Growth of Warehouse Needs

E-Commerce % of Overall Industrial Leasing

11.8%  **20.8%**
2019 2020

<https://www.us.jll.com/en/trends-and-insights/investor/how-the-e-commerce-boom-during-covid-19-is-changing-industrial-real-estate>

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PARKS & OPEN
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AUTO-ORIENTED
USES

Continued Growth of Warehouse Needs

Q Search

Bloomberg

Welcome,

Checkout

Amazon Plans to Put 1,000 Warehouses in Suburban Neighborhoods

Seeking to compete with Walmart on same-day deliveries, the company is opening small shipping hubs around the U.S.

By [Spencer Soper](#)

September 16, 2020, 2:00 AM PDT

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URBAN DESIGN



METROPOLITAN
FOOTPRINT



CENTERS &
CORRIDORS



STREET DESIGN



PARKING
(URBAN FORM)



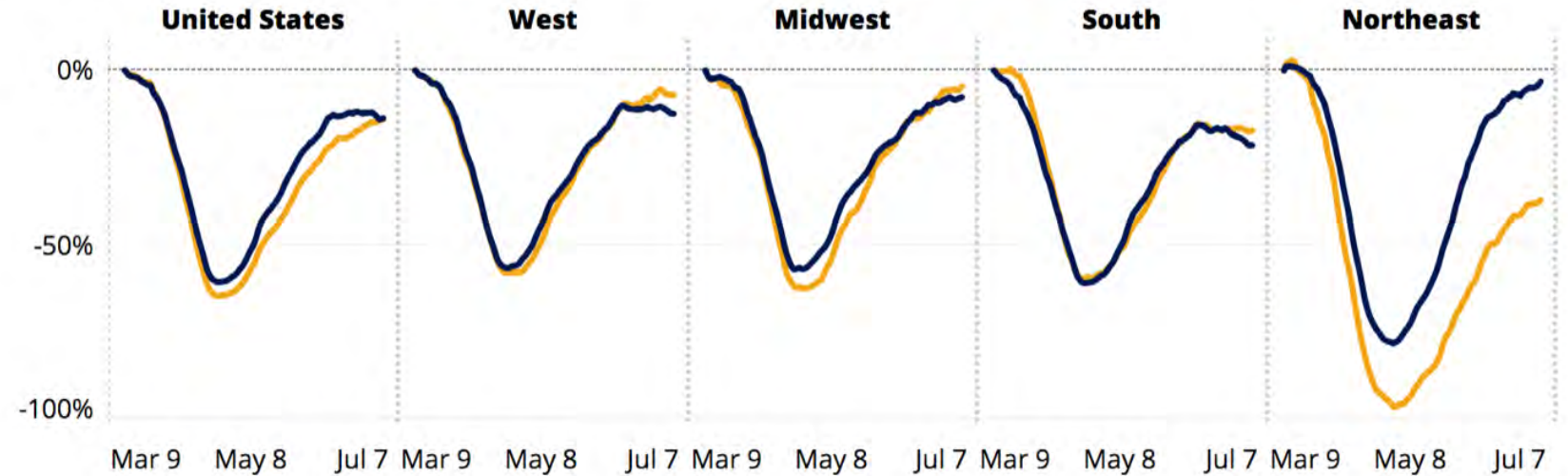
DENSIFICATION



SENSE OF
PLACE

Shift From Urban Areas to Suburban Areas (?)

Change in YoY Pending Sales from February 2020, by **urban** and **suburban** ZIP codes



<https://www.zillow.com/research/2020-urb-suburb-market-report-27712/> - Aug 12, 2020

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PARKING
(URBAN FORM)



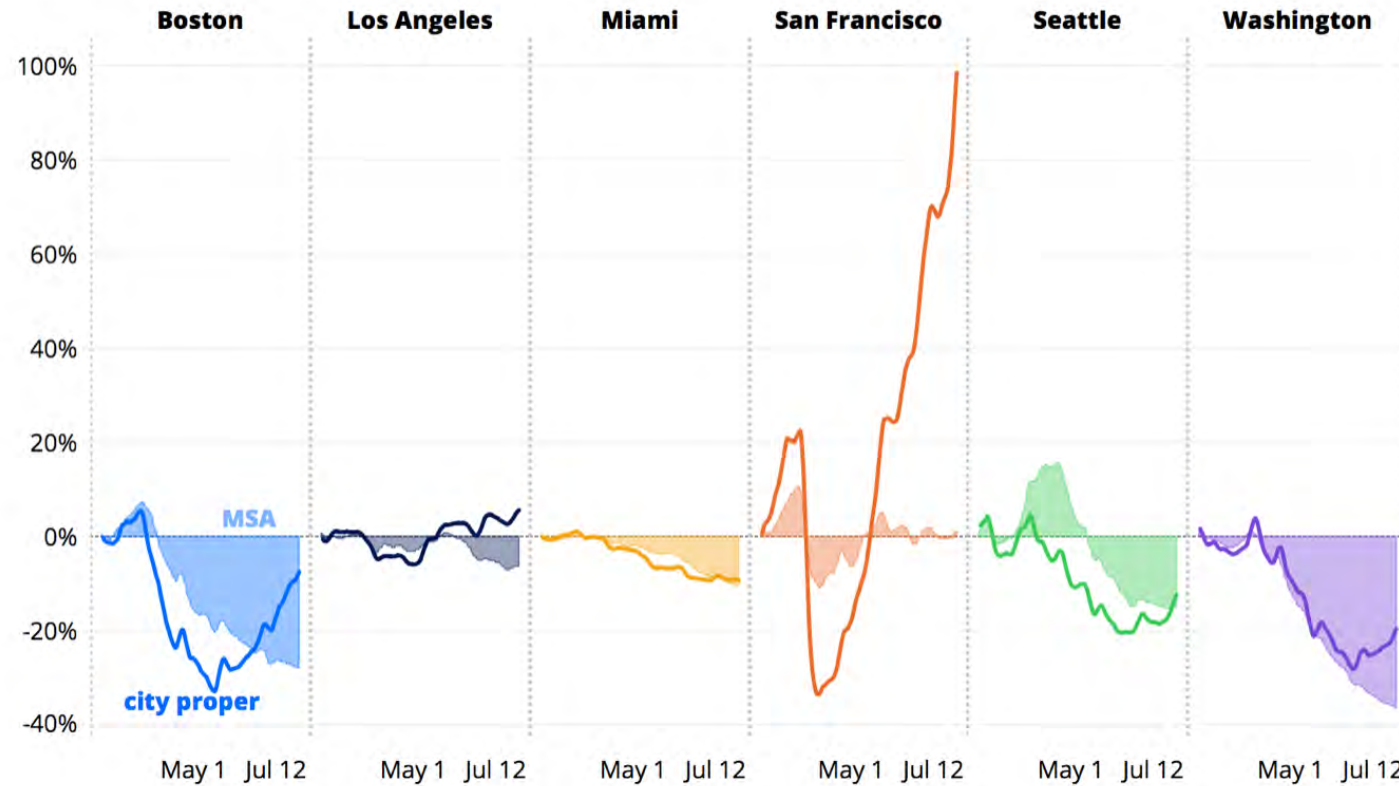
DENSIFICATION



SENSE OF
PLACE

Shift From Urban Areas to Suburban Areas (?)

Change in YoY Inventory from February 2020, in **MSA** and **city proper**



<https://www.zillow.com/research/2020-urb-suburb-market-report-27712/> - Aug 12, 2020

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STREET DESIGN



PARKING
(URBAN FORM)



DENSIFICATION



SENSE OF
PLACE

Shift From Urban Cores to Neighborhood Centers (?)



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METROPOLITAN
FOOTPRINT



CENTERS &
CORRIDORS



STREET DESIGN



PARKING
(URBAN FORM)



DENSIFICATION



SENSE OF
PLACE

Streets as Places



Boston Dining Streets



Yes Segura

URBAN DESIGN



METROPOLITAN
FOOTPRINT



CENTERS &
CORRIDORS



STREET DESIGN



PARKING
(URBAN FORM)



DENSIFICATION



SENSE OF
PLACE

Streets as Places



NYC – Temporary Bike Lanes

**96 Temporary Bike
Actions in US Cities
As of Sept 1, 2020**

NACTO

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BUILDING DESIGN



STREET
RELATIONSHIP



PROGRAMMATIC
SHIFTS



DELIVERY
MANAGEMENT



PARKING

Increased Need to Manage Package and Goods Deliveries



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TRANSPORTATION



WALKING



BIKING &
MICROMOBILITY



TRANSIT



PARKING



VEHICLE
OWNERSHIP

Parking Demand Changes (?)



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TRANSPORTATION



WALKING



BIKING &
MICROMOBILITY



TRANSIT



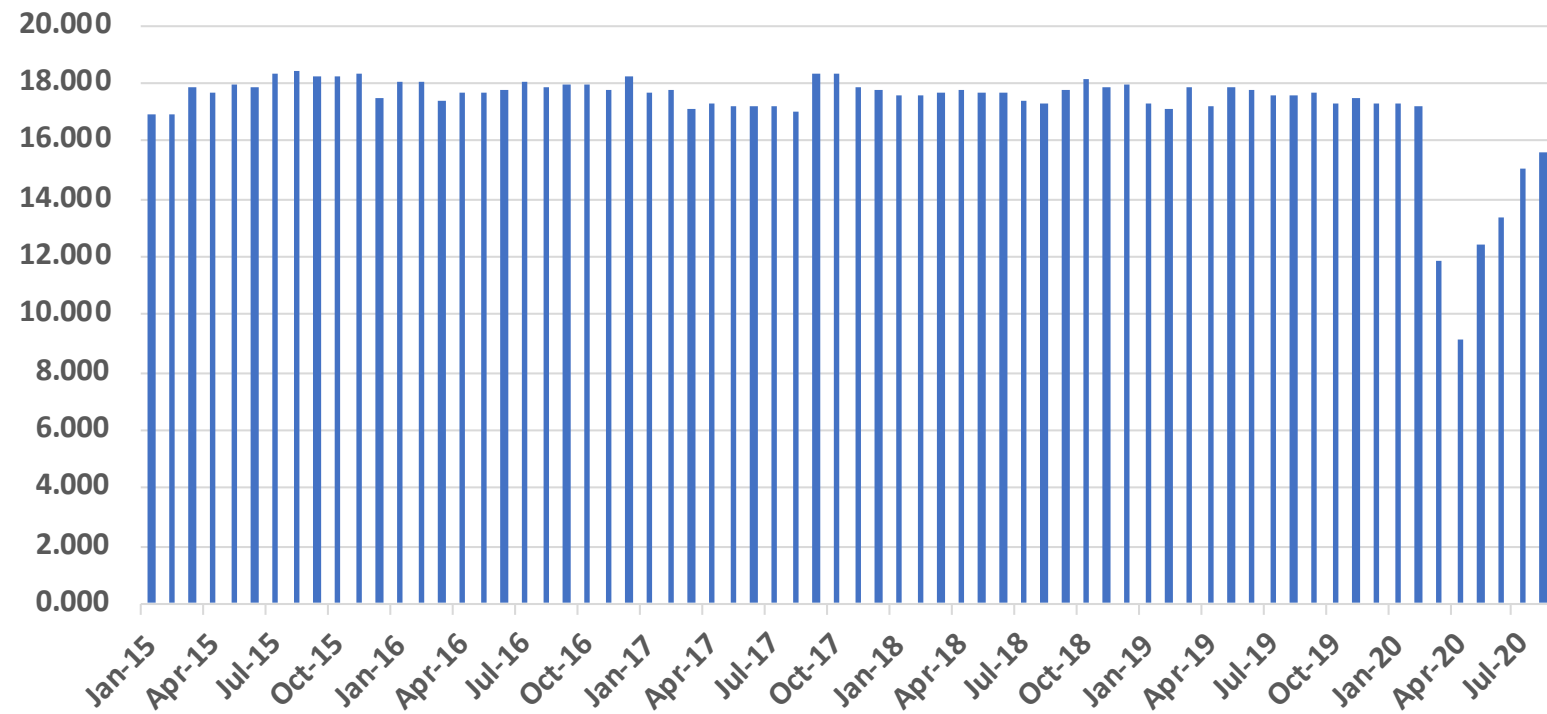
PARKING



VEHICLE
OWNERSHIP

Increased Vehicle Ownership (?)

TOTAL VEHICLE SALES
(US, By Quarter)



<https://fred.stlouisfed.org/series/TOTALSA>

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REAL ESTATE



LAND VALUE



PROJECT
FEASIBILITY



BUZZ/VITALITY



QUALITY



LOCATION &
CONTEXT

Reduced Land Value with Reduced Demand (?)



REAL ESTATE



LAND VALUE



PROJECT
FEASIBILITY



BUZZ/VITALITY



QUALITY



LOCATION &
CONTEXT

Reduced Project Feasibility Due to Reduced Capital

JLL – August 2020

‘Investment volumes in the Americas region saw the biggest half-yearly decline, with a **37%** fall.’

<https://www.us.jll.com/en/trends-and-insights/investor/global-commercial-real-estate-market-feel-impact-of-covid-19>

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REAL ESTATE



LAND VALUE



PROJECT
FEASIBILITY



BUZZ/VITALITY



QUALITY



LOCATION &
CONTEXT

Pause in Experiential Retail



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COVID IMPACTS ARE NOT EQUITABLE

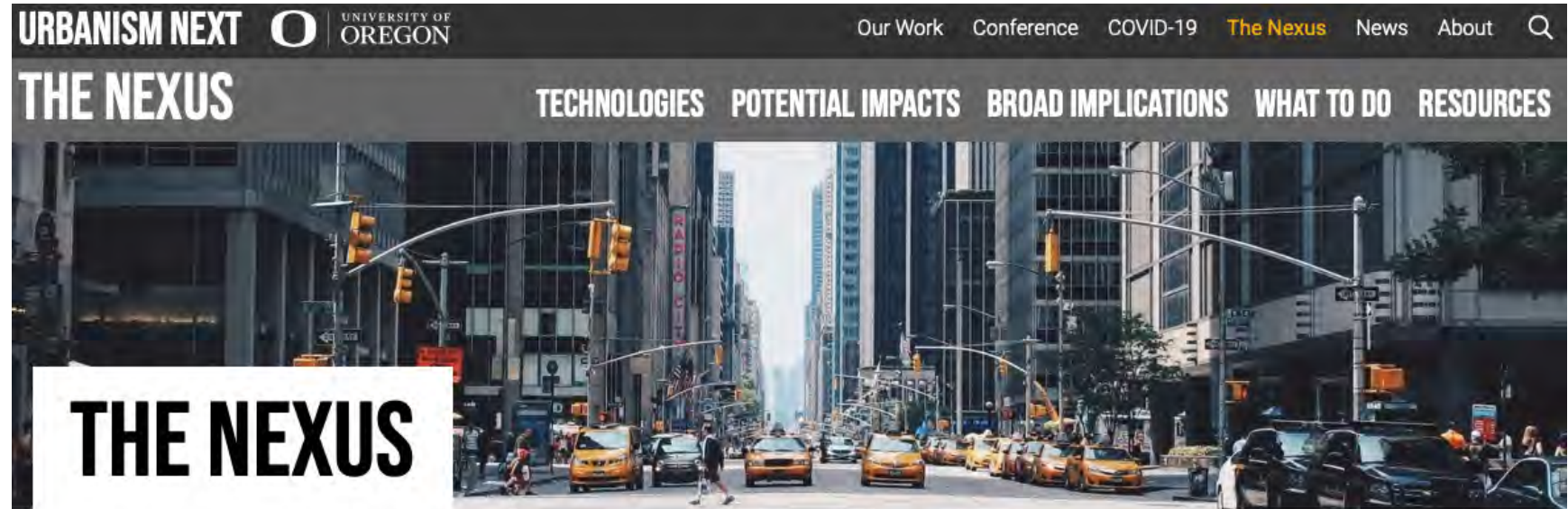
WHAT WILL STICK?

**NOT KNOWING EVERYTHING ABOUT THE
FUTURE DOESN'T MEAN WE DON'T
KNOW ANYTHING ABOUT THE FUTURE**

Variables That Will Decide What Sticks

- Length of Time in Pandemic (Habits)
- Entry Barriers Overcome
- Business Model Maturity – and Consolidations
- Large Decision Points
- Timeline Thresholds
- Continued Fear of Future Pandemics
- Policy Decisions

URBANISMNEXT.ORG | THE NEXUS



Welcome to The Nexus!

The Nexus examines the potential impacts that new mobility, autonomous vehicles, e-commerce, and other innovations will have on cities and communities.

Understanding how new technologies might impact cities is essential for smart decision-making. Use the below links to explore The Nexus by topics, view examples of how to address these issues, and access resources for researching and sharing this information.

THE NEXUS IS PRESENTED
IN PARTNERSHIP WITH




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COVID-19 - RESOURCE PAGES


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OUR WORK CONFERENCE **COVID-19** THE NEXUS NEWS ABOUT 

COVID-19


Examining the near- and long-term impacts on cities.






GENERAL INTEREST

Here are a collection of articles, podcast, webinars, and other resources that we've found interesting and/or useful that aren't directly related to any of the more specific topics we've been delving into.




TRANSIT

Since the onset of the pandemic, transit ridership has fallen substantially, and transit operators are struggling to find the right balance between keeping people moving, especially essential workers, and sufficiently protecting transit workers from the risk of exposure. There are also serious concerns about budget shortfalls with the precipitous drop-off in ridership. To what extent will people return to transit as stay-at-home orders are lifted? Which temporary service changes, if any, will be made permanent?



TRANSPORTATION NETWORK COMPANIES



Find mobility responses to COVID-19

Search initiatives by keywords (New York, transit, delivery...)



And/or browse by

Type ▾

Purpose ▾

Approach ▾

Mode type ▾

Country ▾

Insights



How are communities using open streets to accommodate economic recovery during the COVID-19 pandemic?



How are communities reallocating the street right-of-way to safely accommodate recreational and social activities during the COVID-19 pandemic?



How did taxis and mobility service providers in the United States shift their focus to moving goods as an impact of COVID-19?

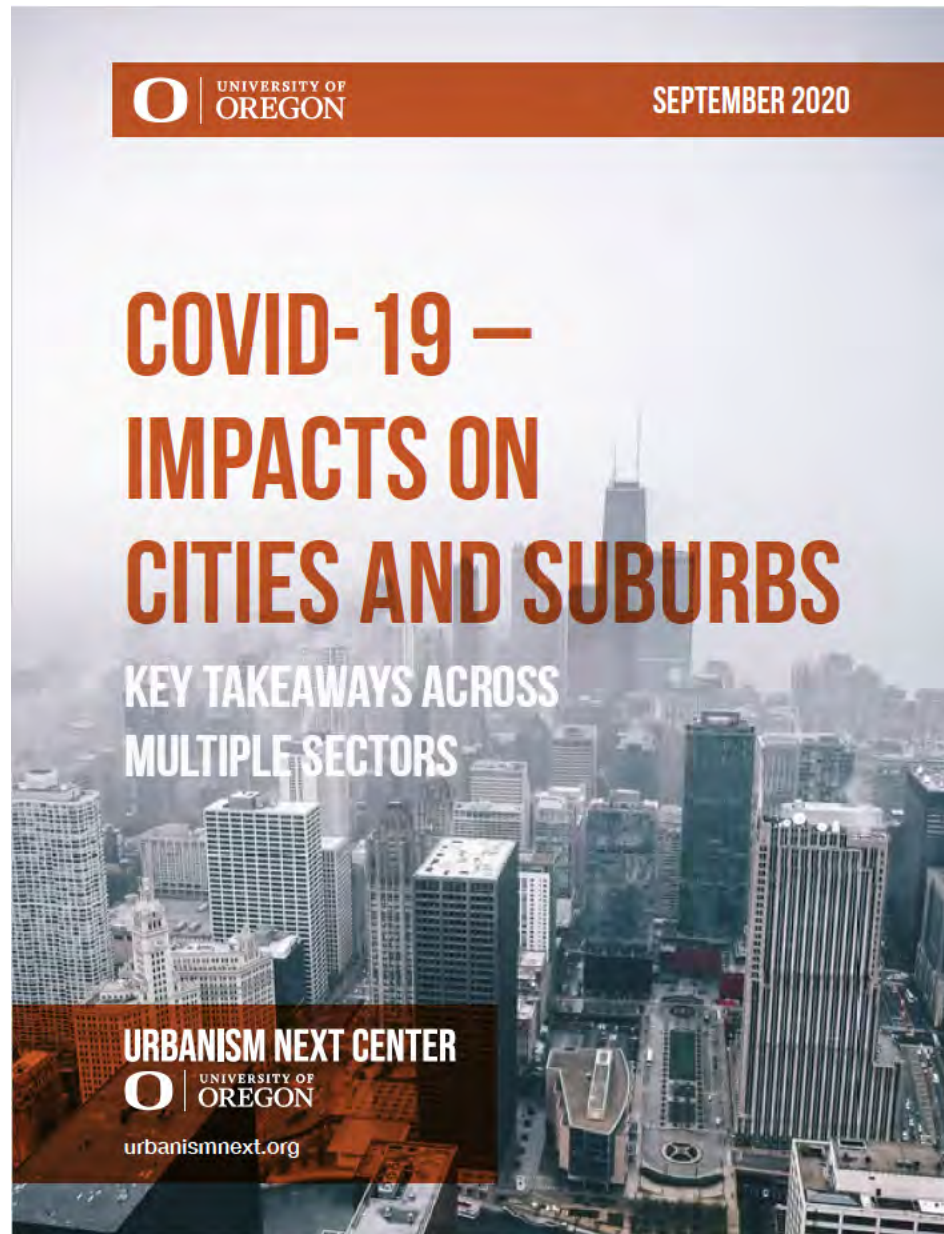


covidmobilityworks.org

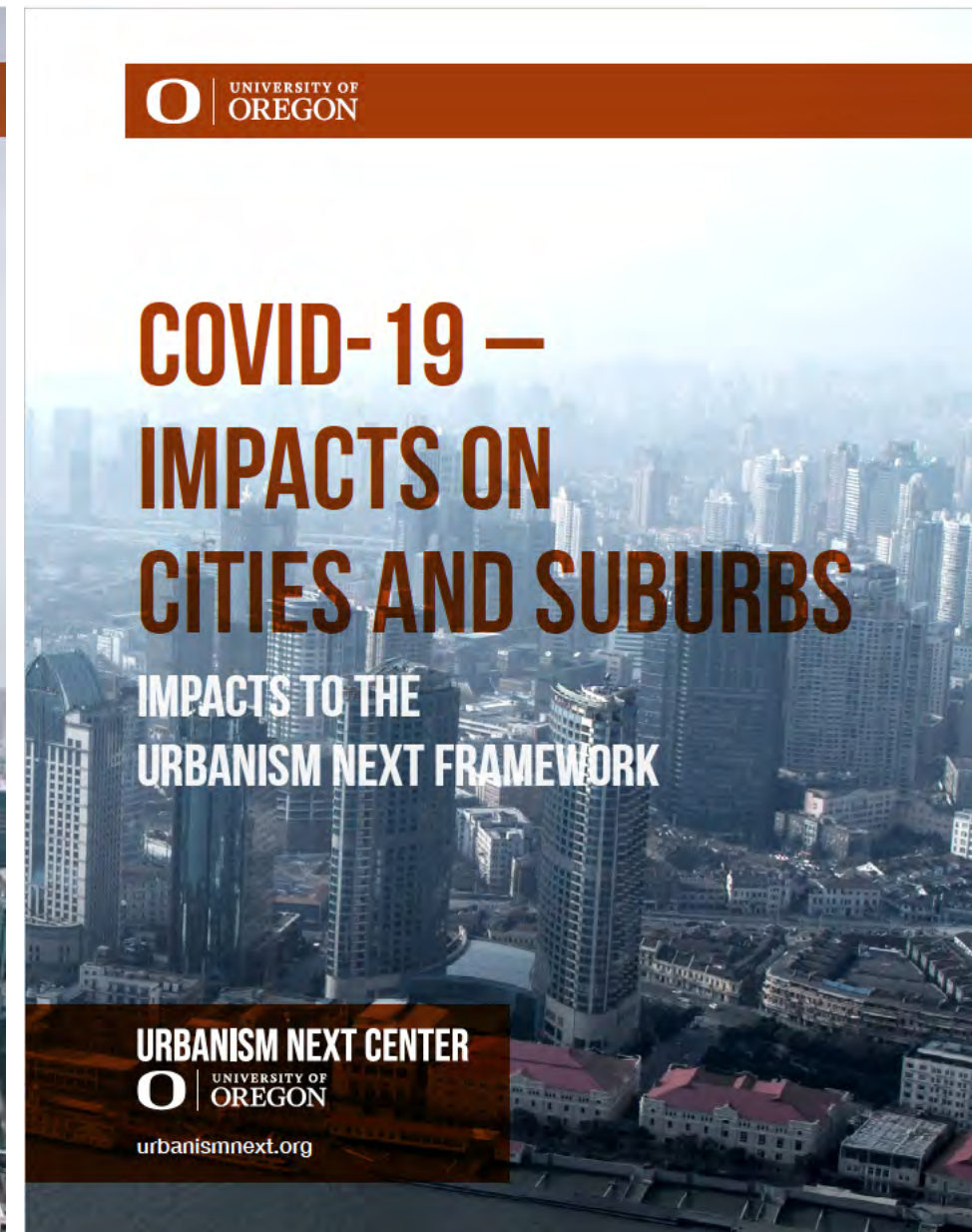
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Grace Kaplowitz
Nico Larco
Amanda Howell
Tiffany Swift
Matthew Stoll



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What Will Stick?

Understanding the Impacts of COVID-19

Nico Larco

Director - Urbanism Next Center
Professor – Dept. of Architecture
University of Oregon
🐦 @nicolarco

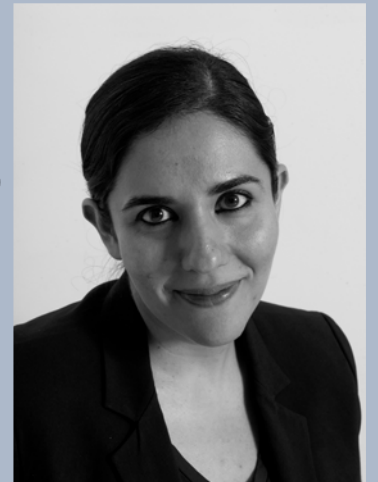
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Jyot Chadha

New Urban Mobility Alliance (NUMO)
Director of Alliance and Partnerships
🐦 @jyotchadha

numo.global



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September 30, 2020