

HANDOUTS

from previous meeting

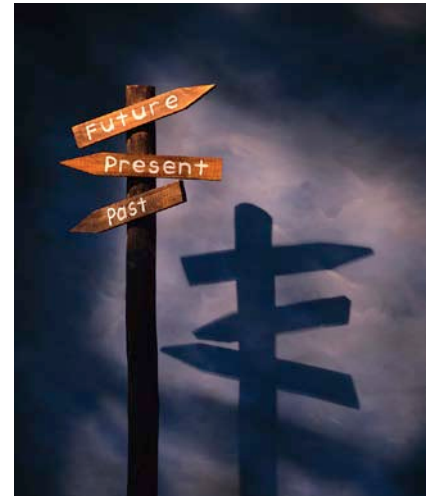


June 15, 2010

Commuter Connections TERM Evaluation Project 2010 State of the Commute Survey



Preliminary Results
June 15, 2010
LDA Consulting
with
ESTC, CIC Research, CUTR



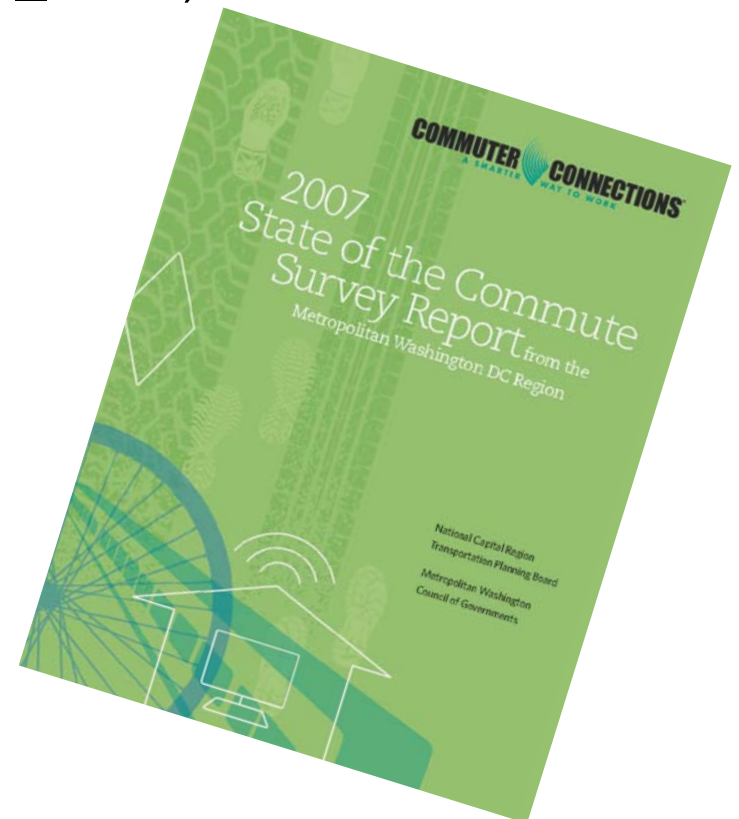


Methodology

Survey Methodology

Method

- Fourth triennial survey (2001, 2004, 2007, 2010)
- Telephone survey of 6,600 randomly-selected employed residents of COG region (95% \pm 1.2%)
- 600 in each of 11 jurisdictions (95% \pm 4.0%)
- Results expanded to regional population of workers
- Also weighted to adjust sample for ethnicity



SOC Survey Topics

Continued Tracking Questions

- Current and past commute patterns
- Telecommuting experience
- Awareness/access to transit, HOV, P&R
- Mass marketing awareness and influence
- Awareness of CC, regional and local commute services
- Employer commute assistance

New Sections for 2010

- Personal / social benefits of ridesharing
- Quality of life and satisfaction
- Regional transportation investment





Commute Patterns

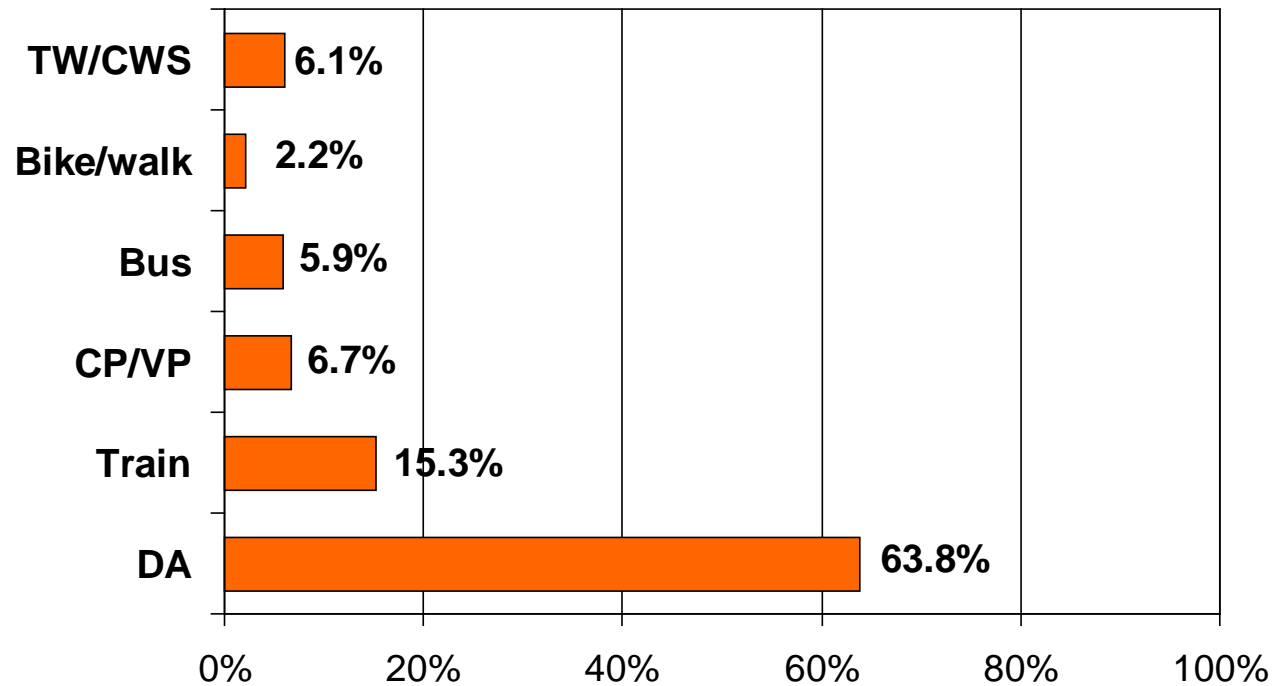


Work Arrangements

	<u>2010 SOC</u>	<u>2007 SOC</u>
■ Work full-time	87%	87%
■ Self-employed	6%	7%
■ Average assigned days	4.9	4.9
■ Average travel days	4.3	4.2
■ Work CWS	5%	4%
■ Telework	24%	19%
■ FT telework	2%	2%
■ Average TC frequency	1.2 d/wk	1.5 d/wk

64% of Commuters' Weekly Commute Trips were Made by Driving Alone

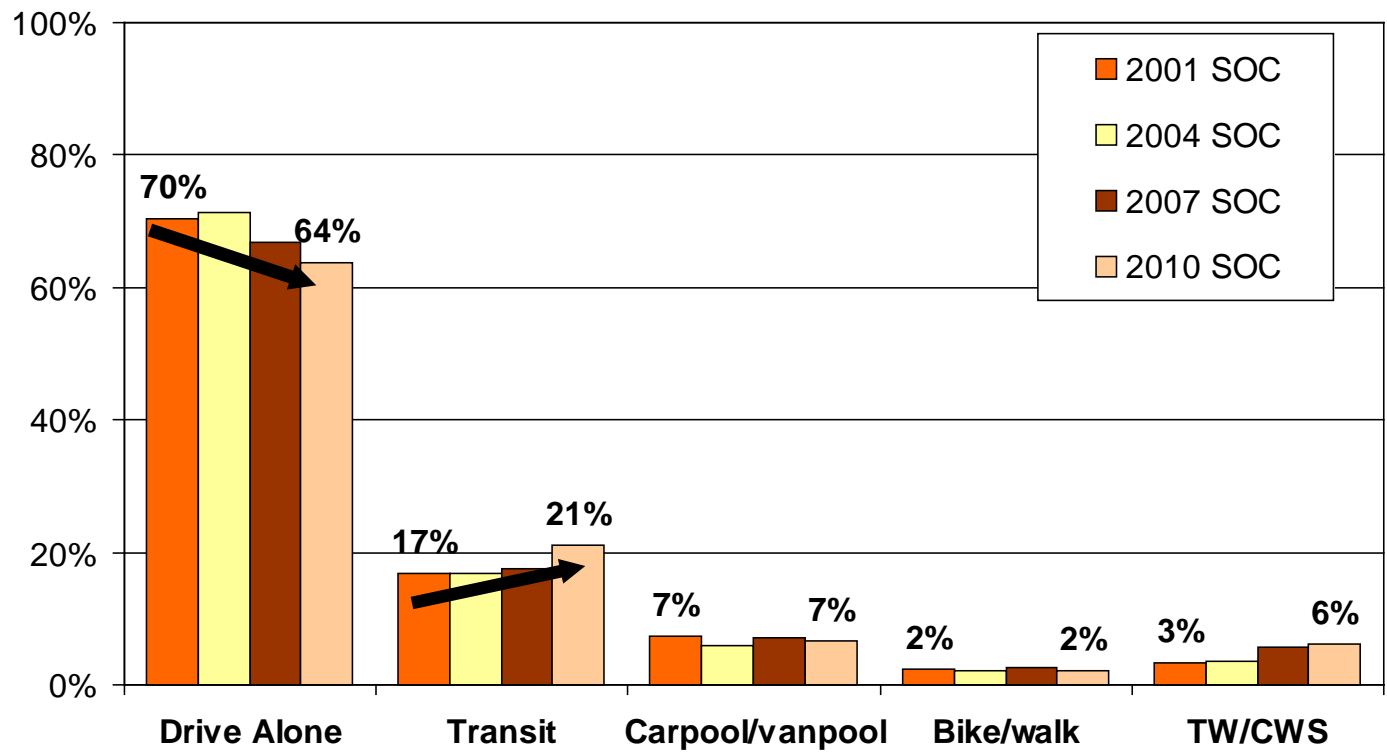
More than two in ten weekly commute trips were made by transit. Telework and compressed schedules eliminated 6% of weekly trips.



Q15. Now thinking about LAST week, how did you get to work each day. ...

Commute Mode 2010, 2007, 2004, 2001

The share of drive alone trips dropped from 2001 to 2010. Transit and TW/ CWS have gained mode share since 2001; all of the increase occurred in telework



2001 SOC
n = 6,924

2004 SOC
n = 6,851

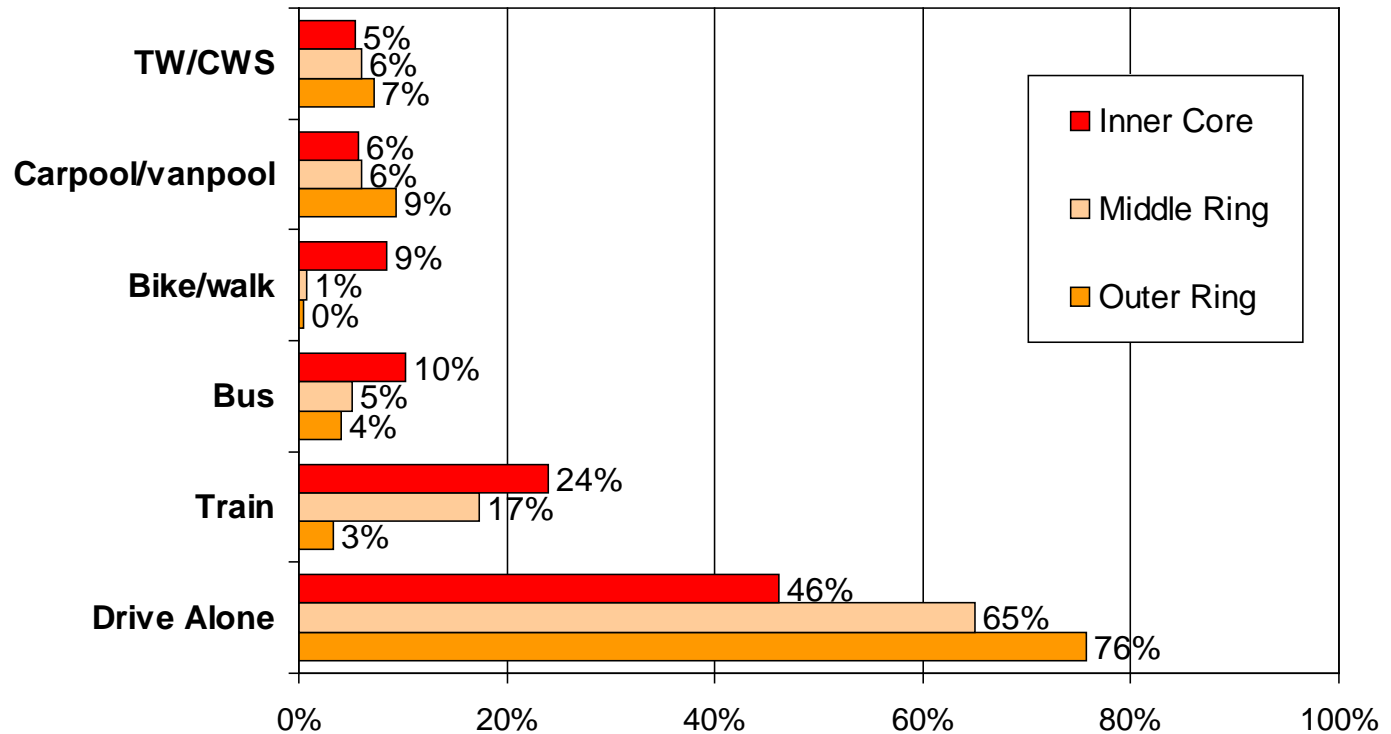
2007 SOC
n = 6,168

2010 SOC
n = 6,050

Q15. Now thinking about LAST week, how did you get to work each day. ...

Commute Mode by Region Sub-Area

Fewer than half of “Inner Core” area commuters drove alone, compared with 65% of commuters in the “Middle Ring” and 76% of commuters in the “Outer Ring” area



Q15. Now thinking about LAST week, how did you get to work each day. ...

Inner Core
(Alexandria,
Arlington, DC)
n = 1,667

Middle Ring
(Fairfax,
Montgomery,
Prince
George's)
n = 1,691

Outer Ring
(Calvert,
Charles,
Frederick,
Loudoun,
Prince
William)
n = 2,844

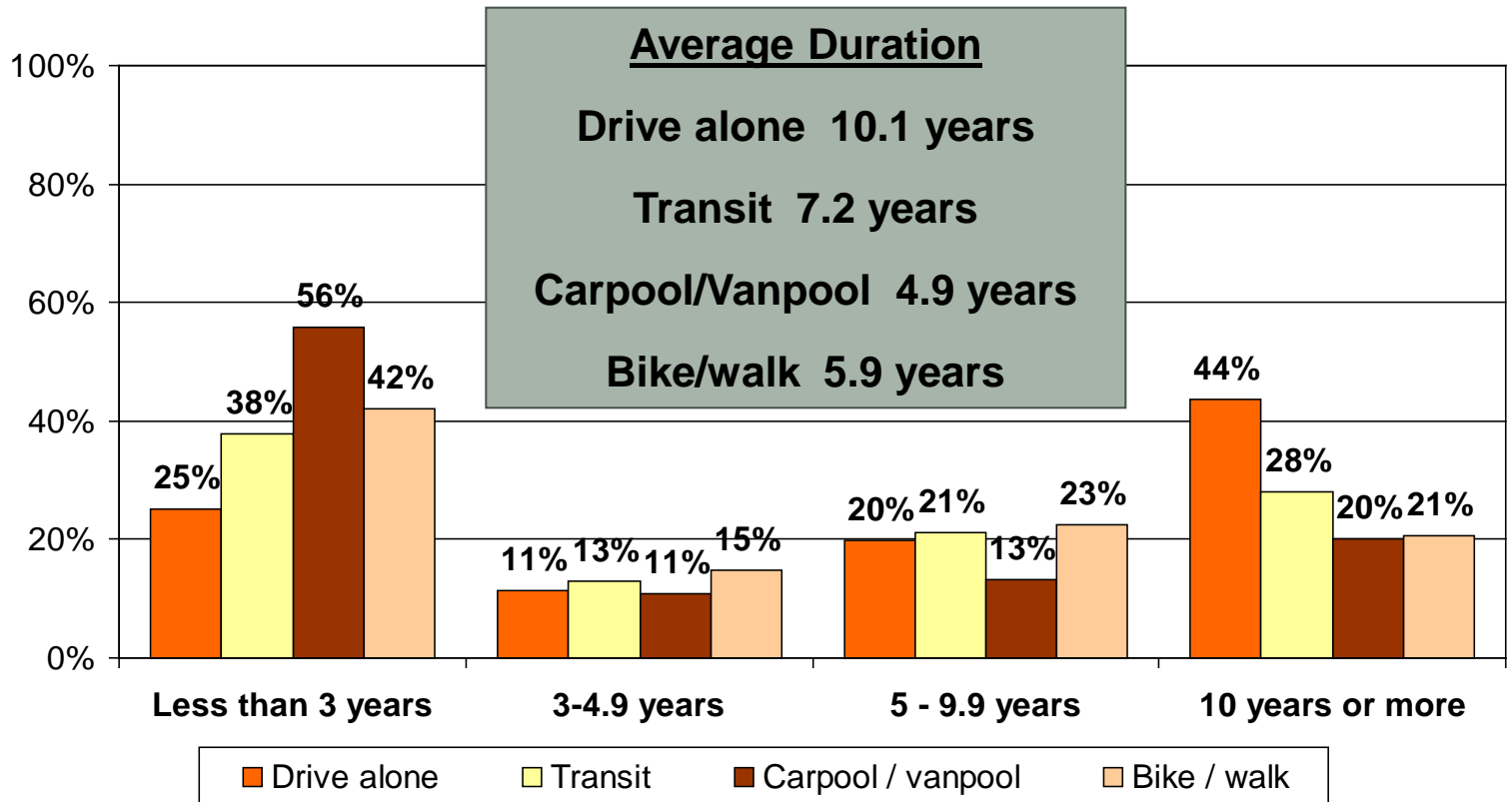
Frequency of Mode Use

84% of commuters use one commute mode 4+ days per week. Alt mode users tend to have slightly less frequent use of their primary modes than do drive alone commuters, thus, there is modest potential for greater alt mode use by **current** alt mode users.

Modes Used for Travel to Work	Primary	1+ Day / Week	Difference
Drive alone	63.0%	69.4%	5.4%
Metrorail/Commuter Rail	14.9%	17.2%	2.3%
Bus	5.8%	6.8%	1.0%
Carpool/vanpool	6.5%	7.7%	1.2%
Bicycle / walk	2.2%	3.0%	0.8%
Telework/CWS	3.5%	14.0%	10.5%

Mode Duration

56% of commuters who carpool / vanpool started using this mode within the past three years. Commuter who drove to work had used this mode longer on average than had commuters who used alternative modes.



Drive alone
n = 3,310

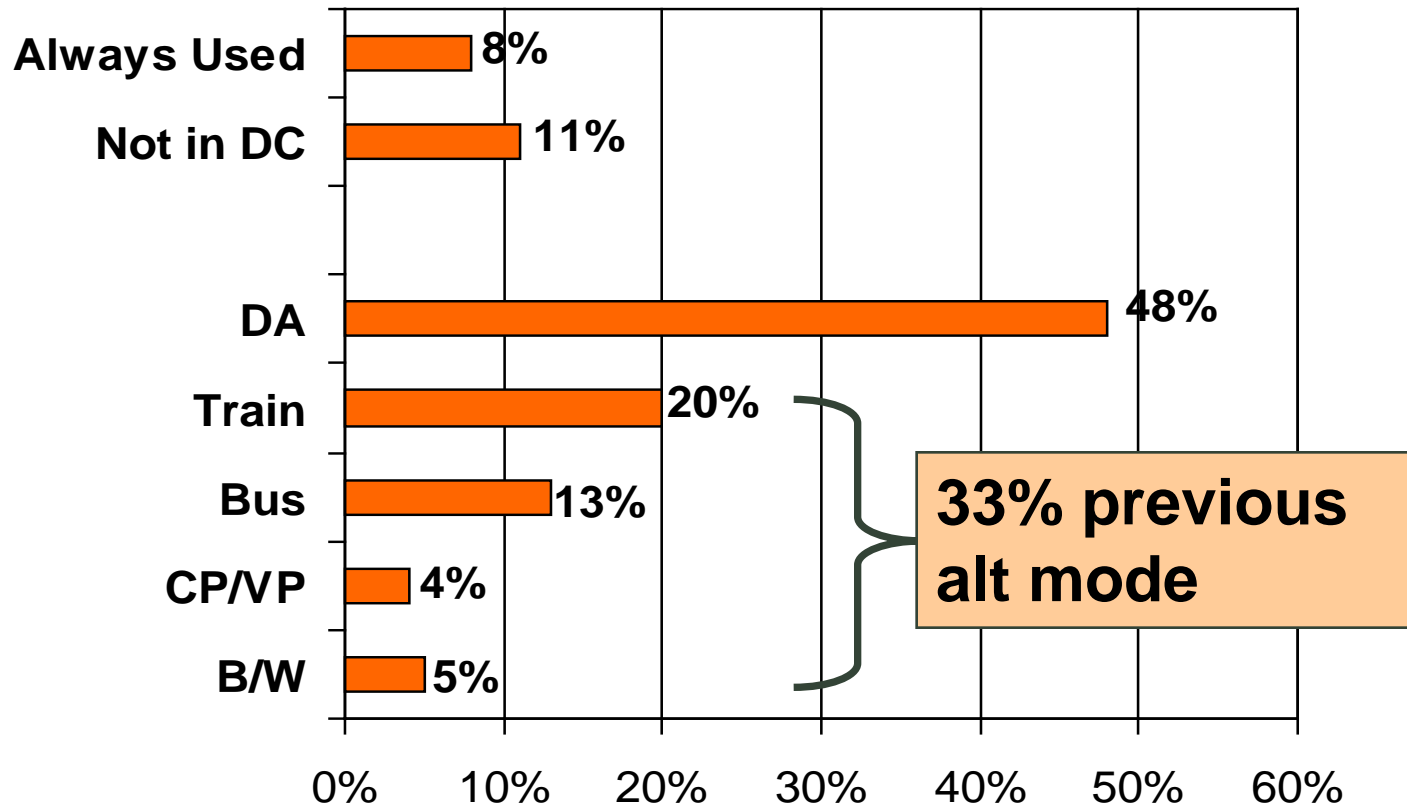
Transit
n = 1,074

Carpool/
Vanpool
n = 472

Bike/walk
n = 195

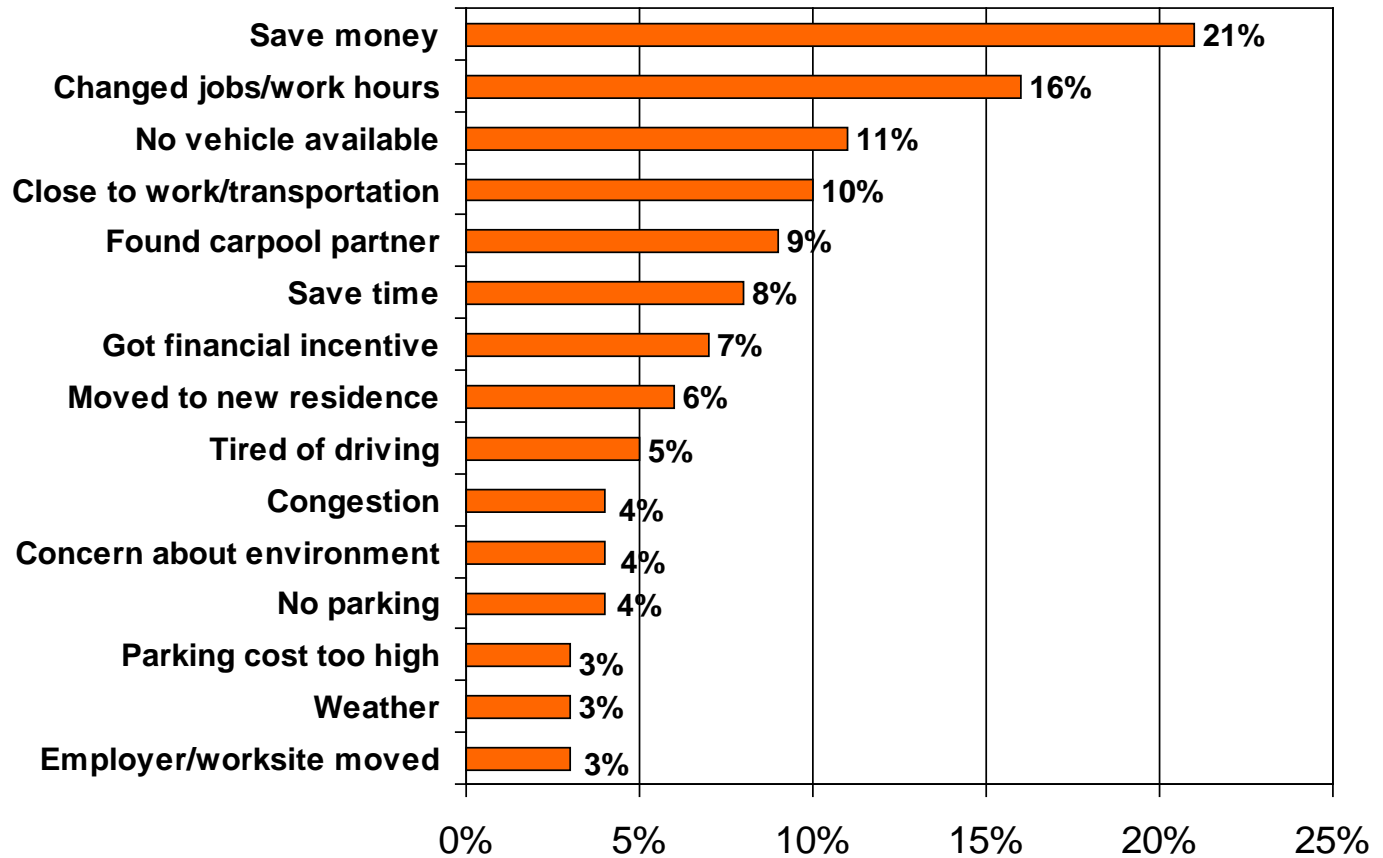
Q18 How long have you been using <MODE Q15> to get to work?

Nearly Half of Alternative Mode Users Previously Drove Alone and 33% Shifted from Another Alternative Mode



Q19a – Before starting to <RECENT MODE> to work, what type or types of transportation did you use to get to work?

21% of Residents Who Use Alternative Modes for Commuting Started Using These Modes to Save Money

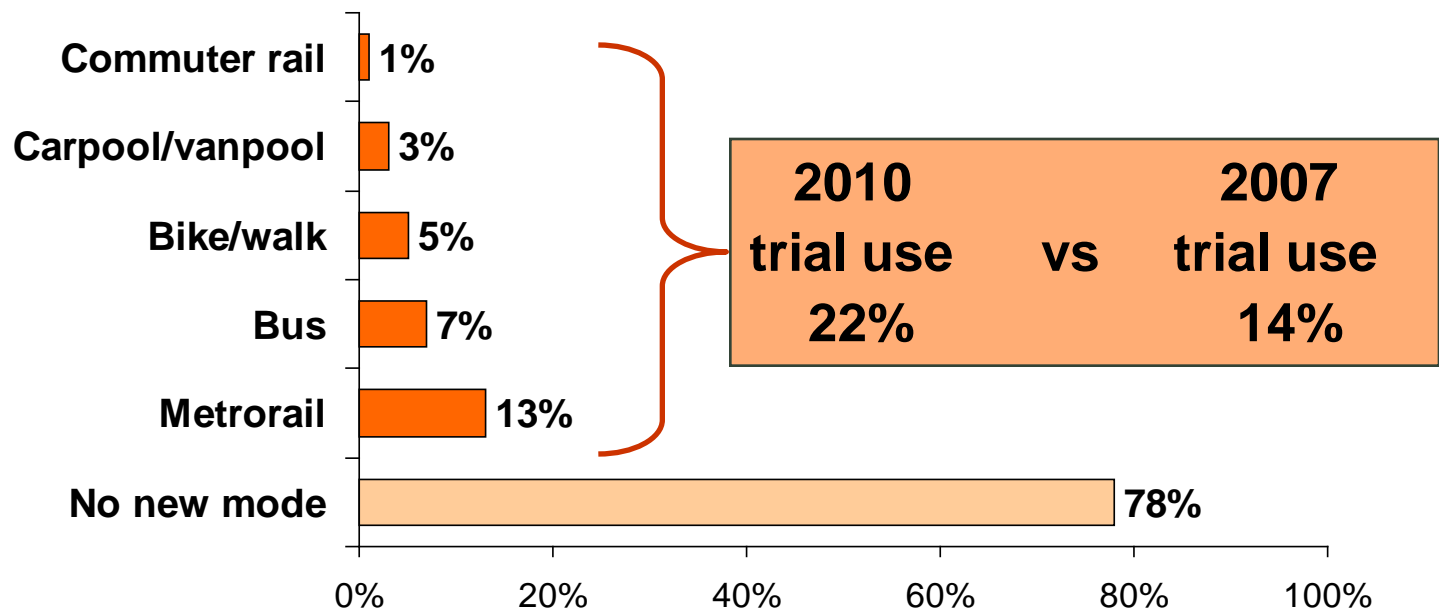


n =

Q20 – What were the reasons you began using this <MODE>?

In the Two Years Prior to the Survey, 22% of Commuters Tried/Used an Alternative Mode They were Not Currently Using - Most used / tried Metrorail or bus

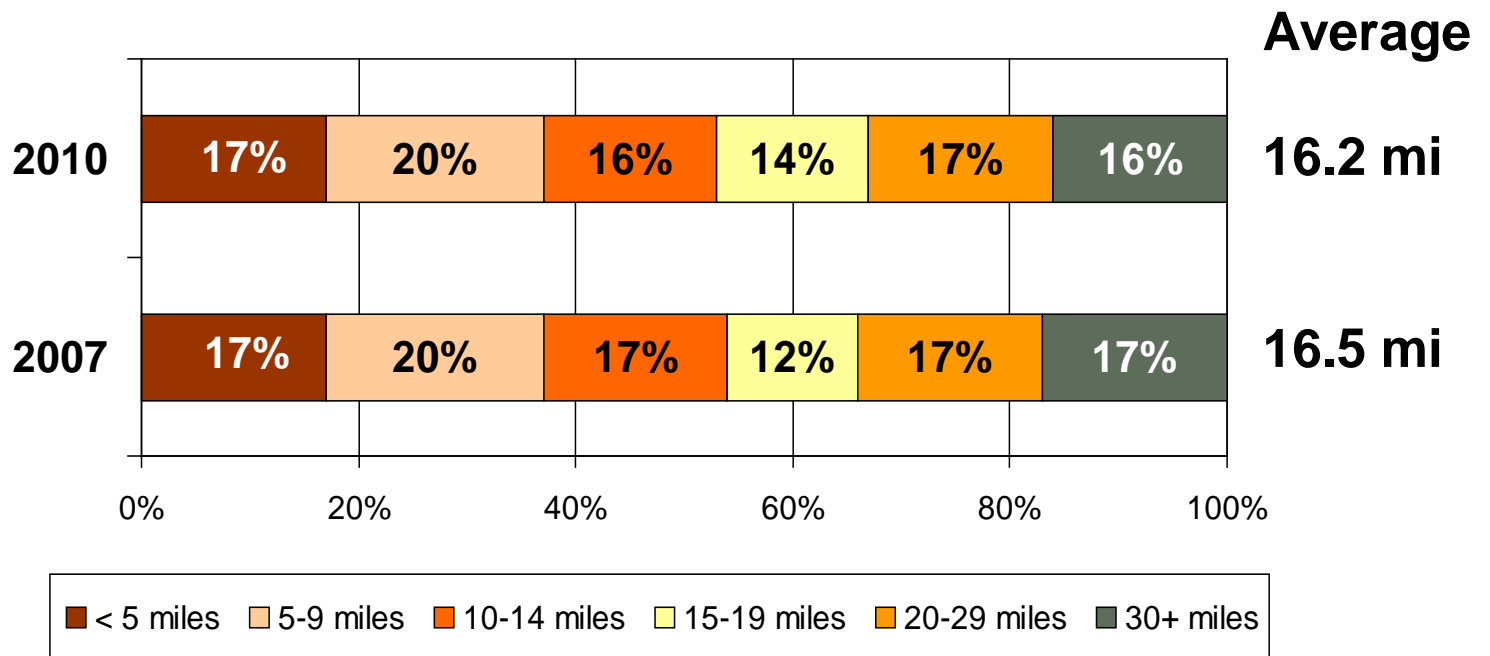
Alternative Modes Tried/Used



Q30Q19a – Before starting to <RECENT MODE> to work, what type or types of transportation did you use to get to work?

Commute Distance (miles)

Commute distances remained stable since 2007. In 2010, commuters traveled an average of 16.2 miles one way, compared with 16.5 miles in 2007. More than a third of respondents traveled fewer than 10 miles, but 34% traveled 20 miles or more



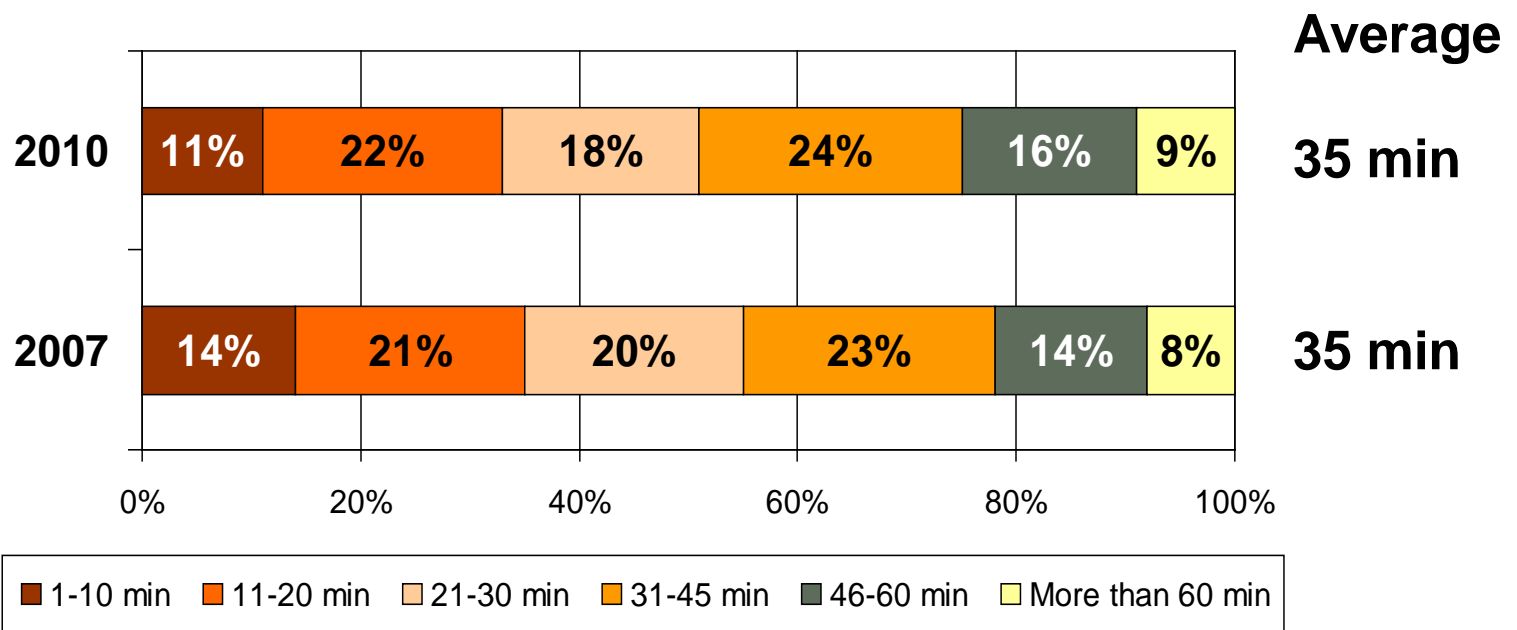
2010 SOC
n = 5,533

2007 SOC
n = 5,465

Q17 How long is your typical daily commute one way? How many miles?

Travel Time (minutes)

The average commute time in 2010 was the same (35 minutes) as in 2007. About a third of respondents traveled 20 minutes or less to work. About one in ten traveled 60 minutes or more.



2010 SOC
n = 5,533

2007 SOC
n = 5,465

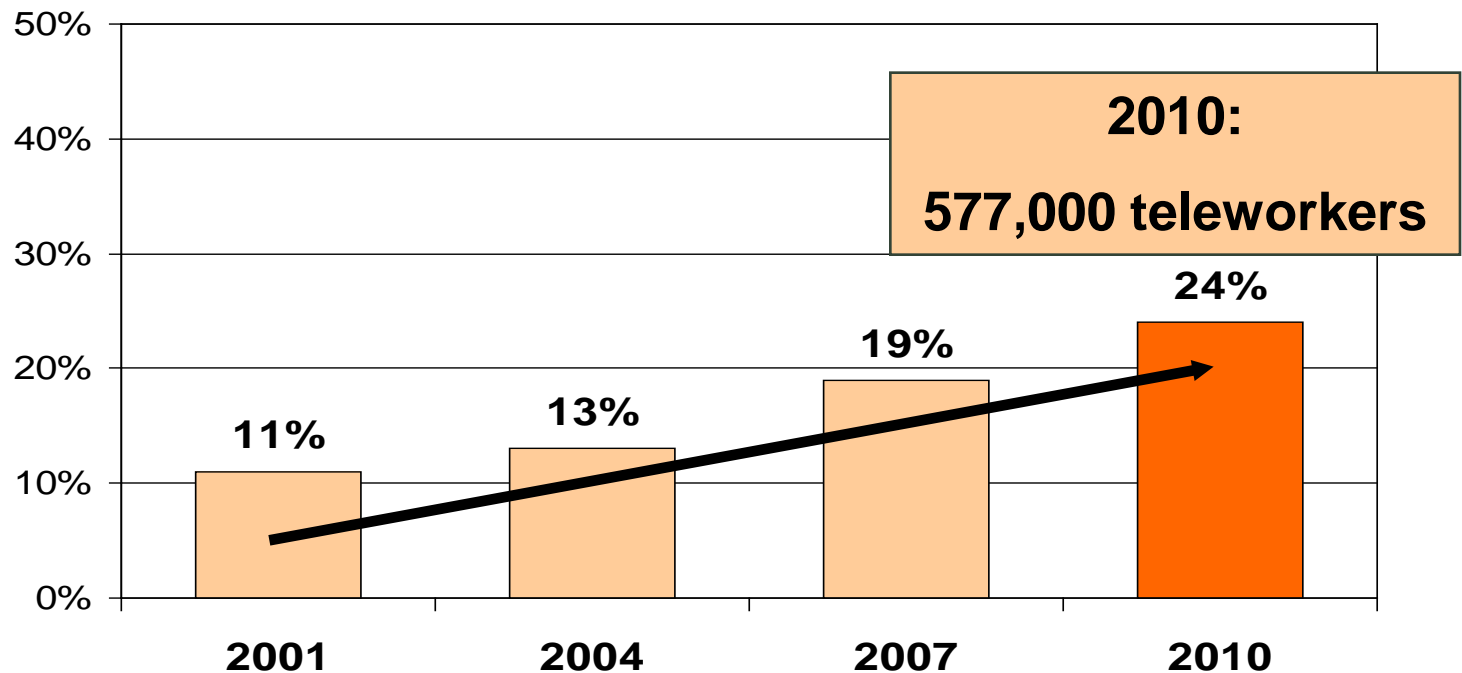
Q17 How long is your typical daily commute one way? How many minutes?



Telework Experience

Telework has Grown Substantially Since 2001

Nearly a quarter of regional workers telework at least occasionally. This is more than twice the percentage who teleworked in 2001.



2001 SOC
N = 6,924

2004 SOC
N = 6,851

2007 SOC
n = 6,168

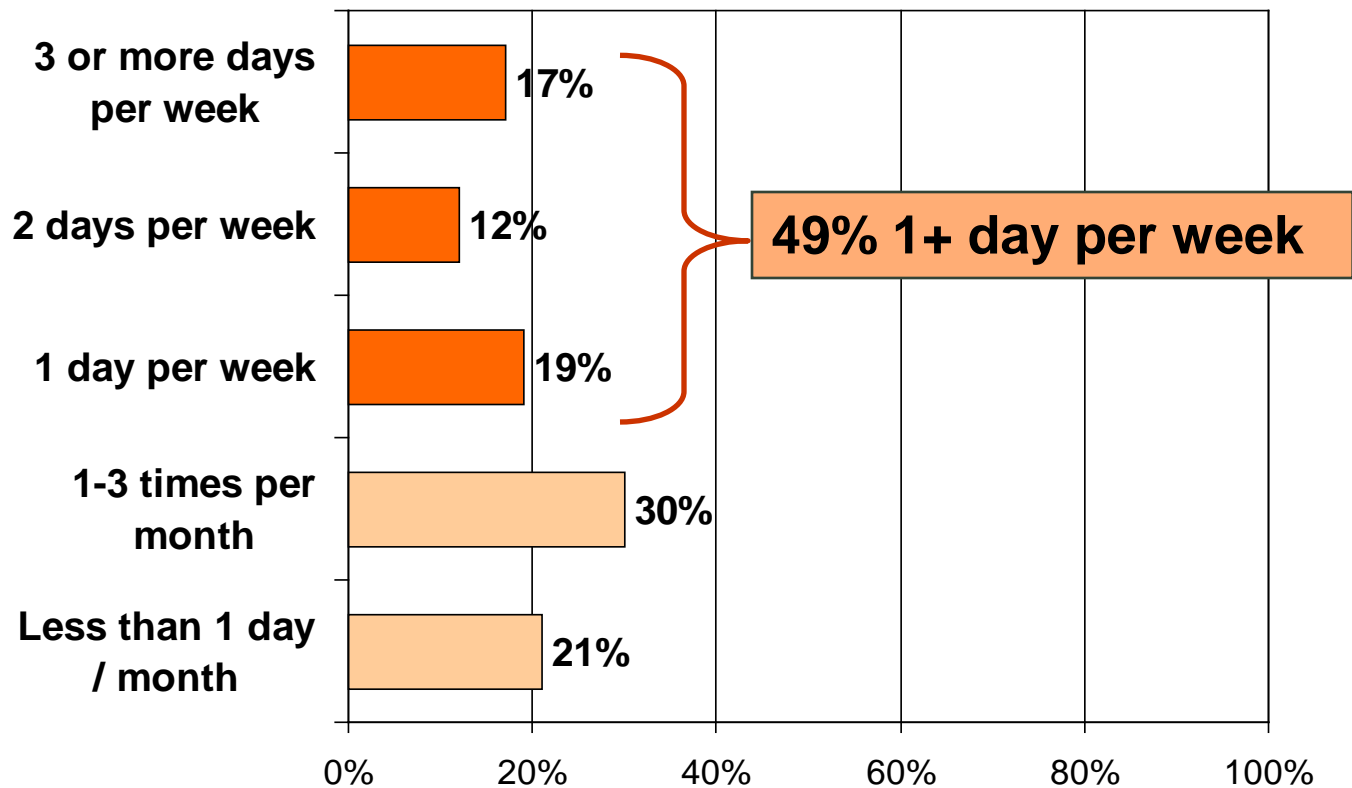
2010 SOC
n = 6,050

Excludes
workers who
are self-
employed and
work only at
home

Q13 Now I want to ask you about telecommuting, also called teleworking. For purposes of this survey, “telecommuters” are defined as “wage and salary employees who at least occasionally work at home or at a telework or satellite center during an entire work day, instead of traveling to their regular work place.” Based on this definition, are you a telecommuter?

Half of Teleworkers Telework at Least One Day per Week

The average telework frequency is 1.2 days per week

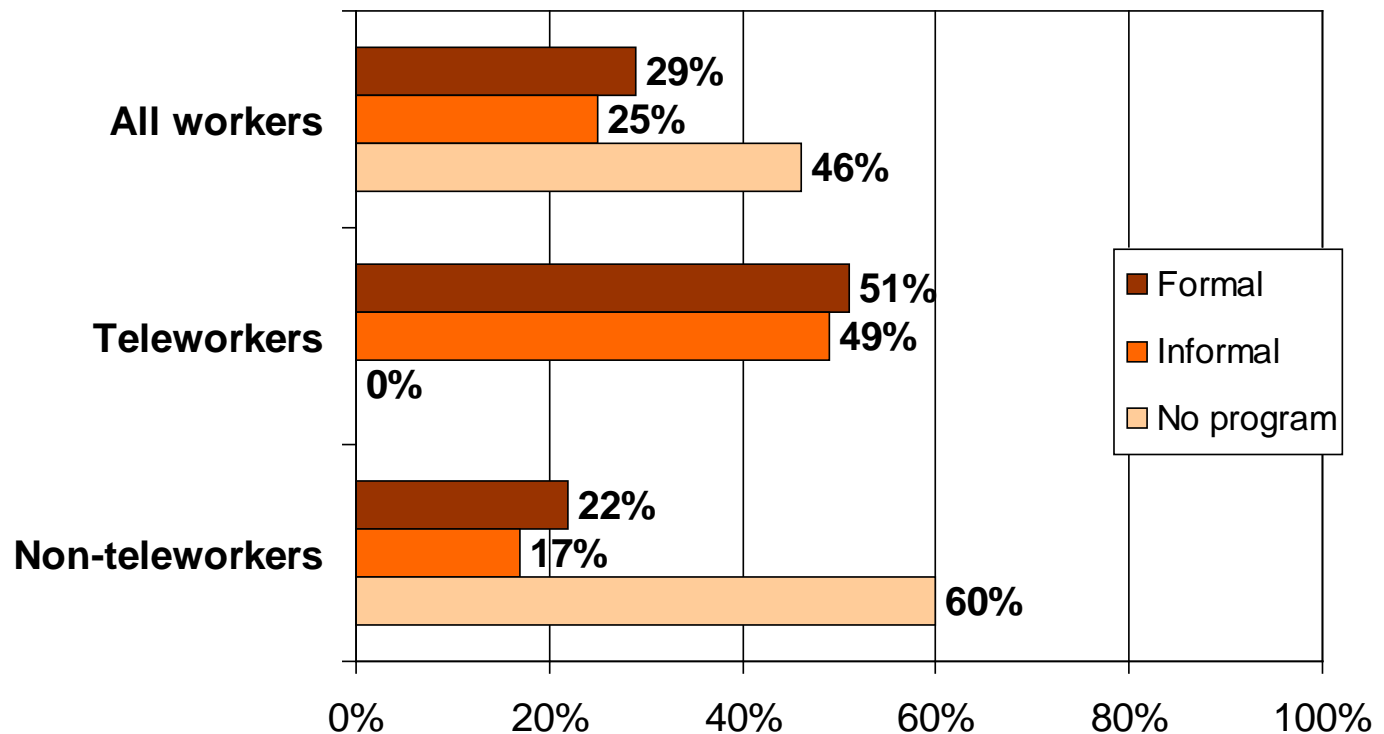


n = 1,529

Q14 How often do you usually telecommute?

Three in Ten Workers Said Their Employer has a Formal Telework Program; About Half Said the Employer Does not Allow Telework

But half of Teleworkers Telework Under a Formal Program



All workers
n = 5,854

Teleworkers
n = 1,488

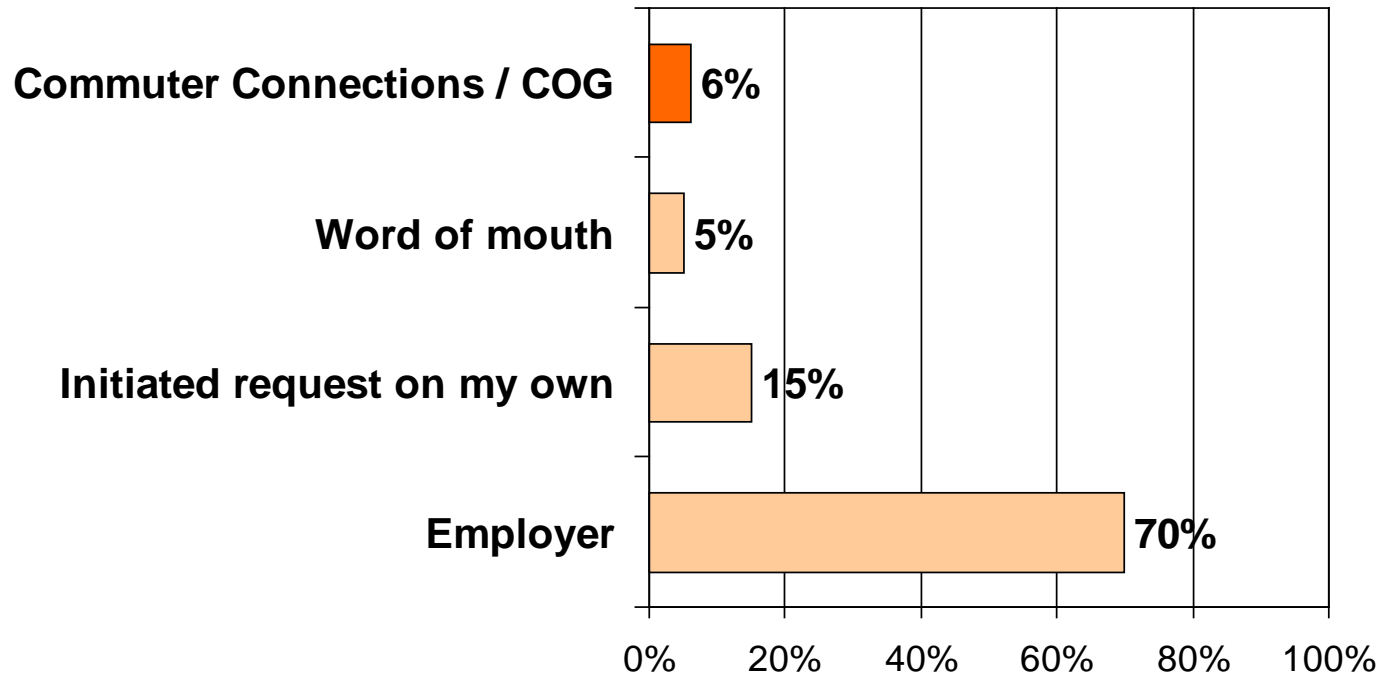
Non-teleworkers
n = 4,366

Q13a Does your employer have a formal telecommuting program at your workplace or do you telecommute under an informal arrangement between you and your supervisor?

14d Does your employer have a formal telecommuting program at your workplace or permit employees to telecommute under an informal arrangement with the supervisor?

About Six Percent of Teleworkers Received Telework Information from Commuter Connections / COG

Most Learned about TW from their Employer

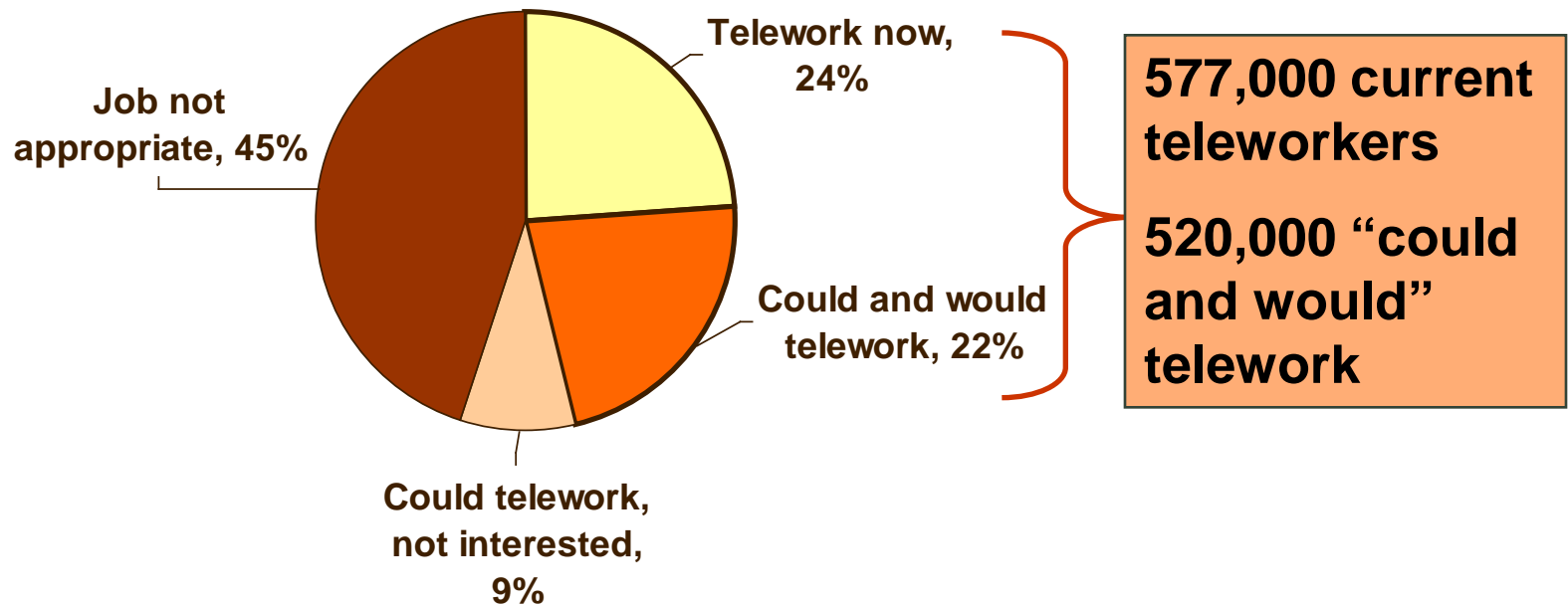


Q42 How did you find out about telecommuting?

Q43 Did you receive any information about telecommuting from Commuter Connections or from the Telework Resource Center at the Council of Governments?

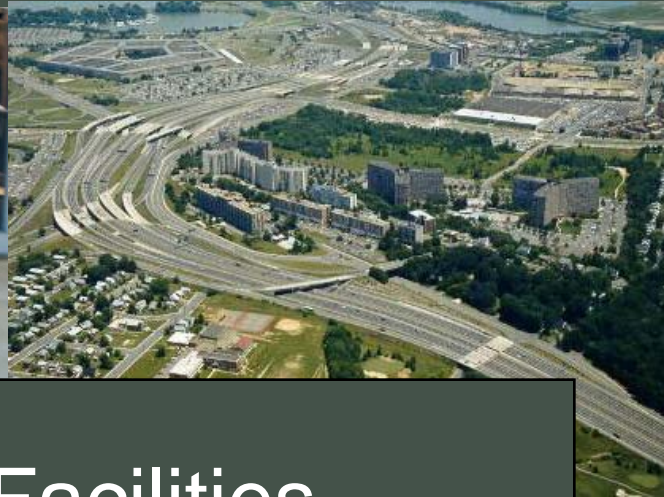
Potential for 520,000 New Teleworkers

Two in ten workers have job responsibilities that could be performed through telework and would like to telework. About two-thirds of interested workers would like to telework “regularly” and one-third would like to telework “occasionally.”

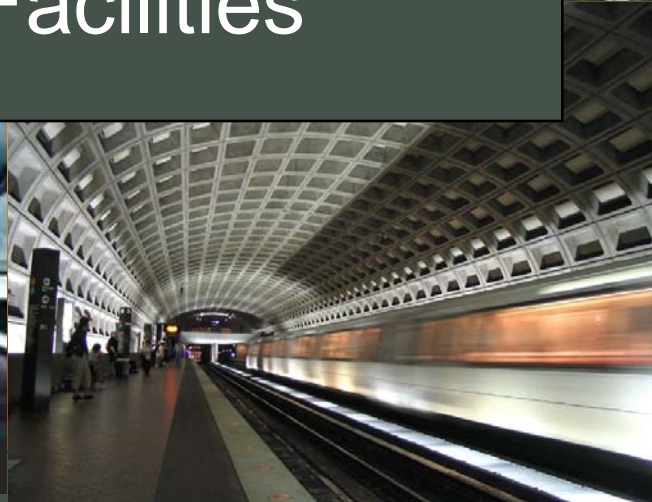


Q14e Would your job responsibilities allow you to work at a location other than your main work place at least occasionally?

Q14f Would you be interested in telecommuting on an occasional or regular basis?

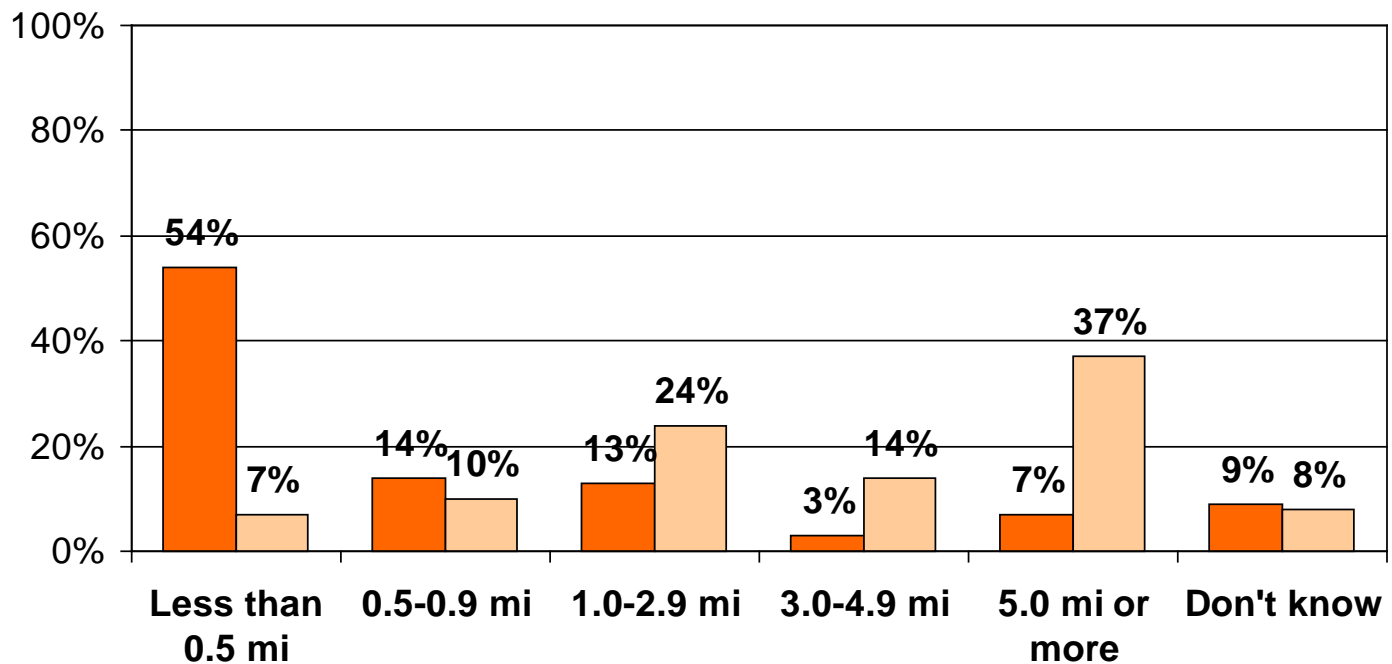


Travel Facilities



Bus and Train Access at Home

About half of respondents (54%) said they lived within ½ mile of a bus stop and 68% said they lived within 1 mile. Train station access was less convenient; only 17% lived within 1 mile of a train station.



Q44a About how far from your home is the nearest bus stop?

Q44b How far from your home is the nearest train station?

Bus distance
n = 6,189

Train distance
n = 6,050

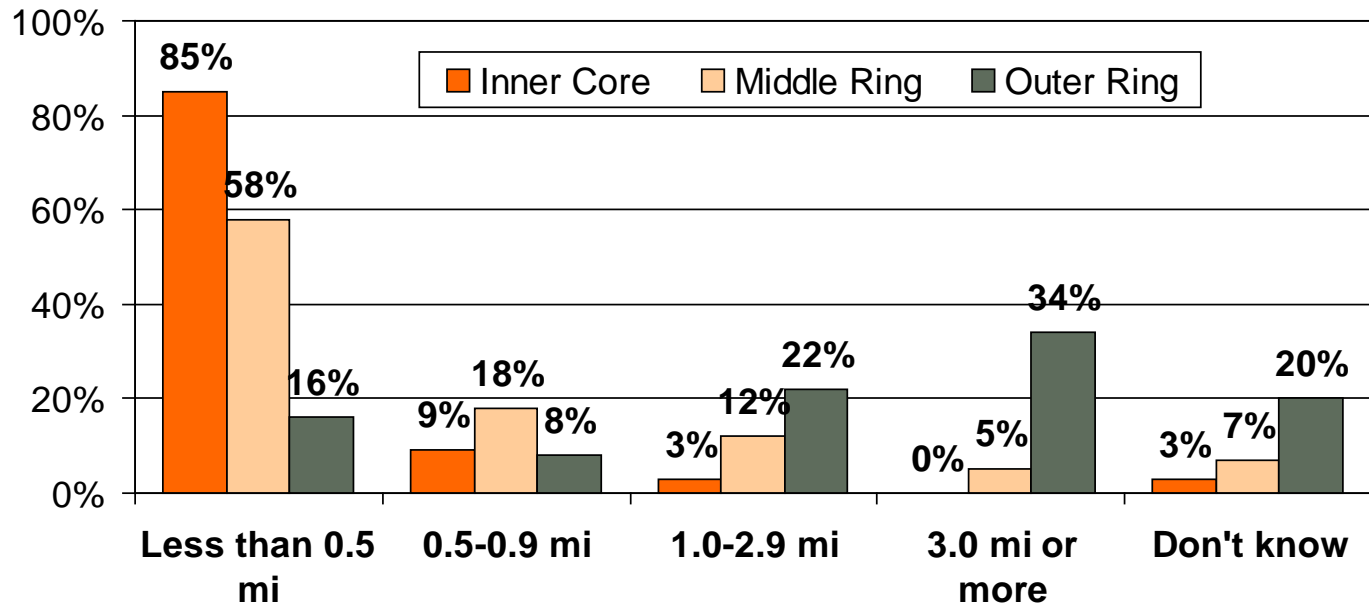
Bus and Train Access By Area of Region

More than eight in ten respondents who lived in the “Inner Core” area of the region lived within ½ mile of a bus stop. In the “Middle Ring” area, about six in ten had a bus stop within ½ mile. Fewer than two in ten residents of “Outer Ring” jurisdictions had close access to bus.

Inner Core
(Alexandria,
Arlington, DC)
n = 1,667

Middle Ring
(Fairfax,
Montgomery,
Prince
George's)
n = 1,685

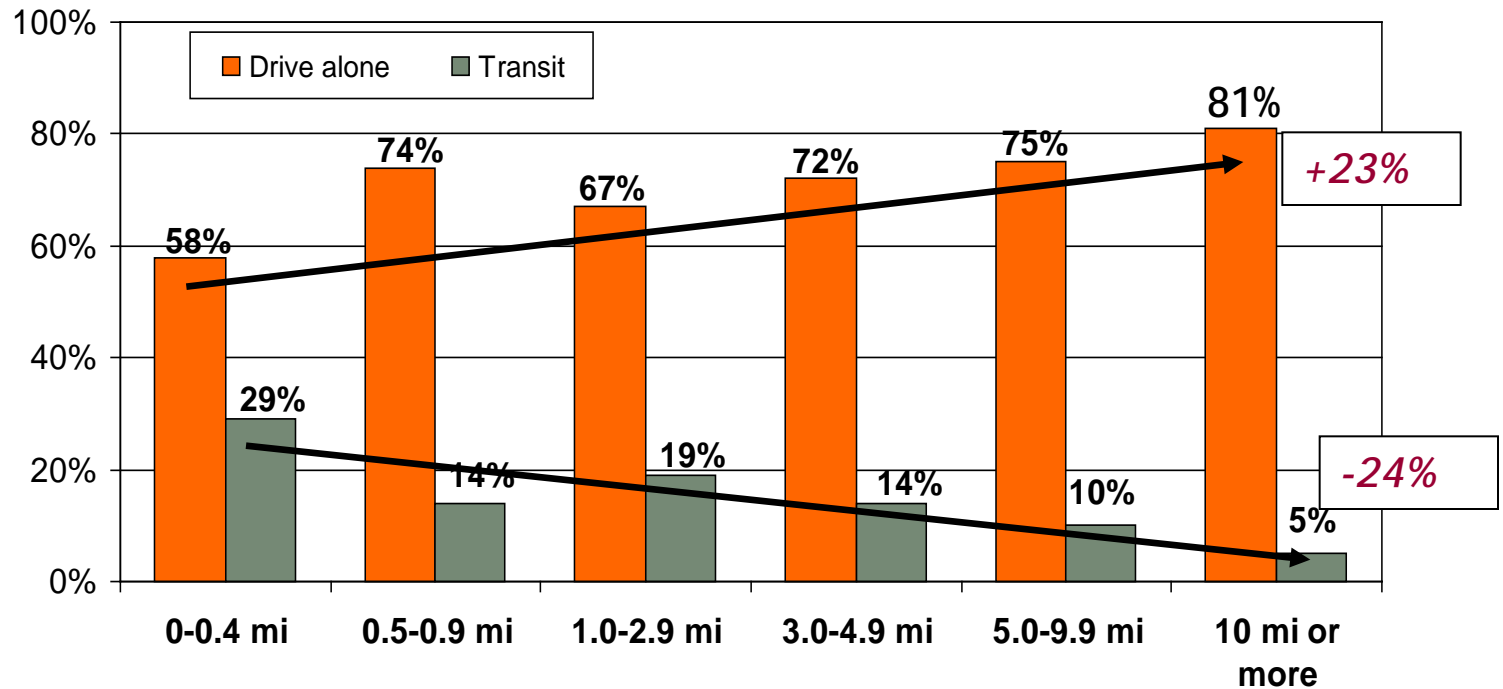
Outer Ring
(Calvert,
Charles,
Frederick,
Loudoun,
Prince
William)
n = 2,837



Q44a About how far from your home is the nearest bus stop?

Q44b How far from your home is the nearest train station?

Drive Alone Rate Increased and Transit Use Decreased as the Distance from Home to Bus Increased



0.0-0.4 mi
n = 2,696

0.5-0.9 mi
n = 681

1.0-2.9 mi
n = 843

3.0-4.9 mi
n = 338

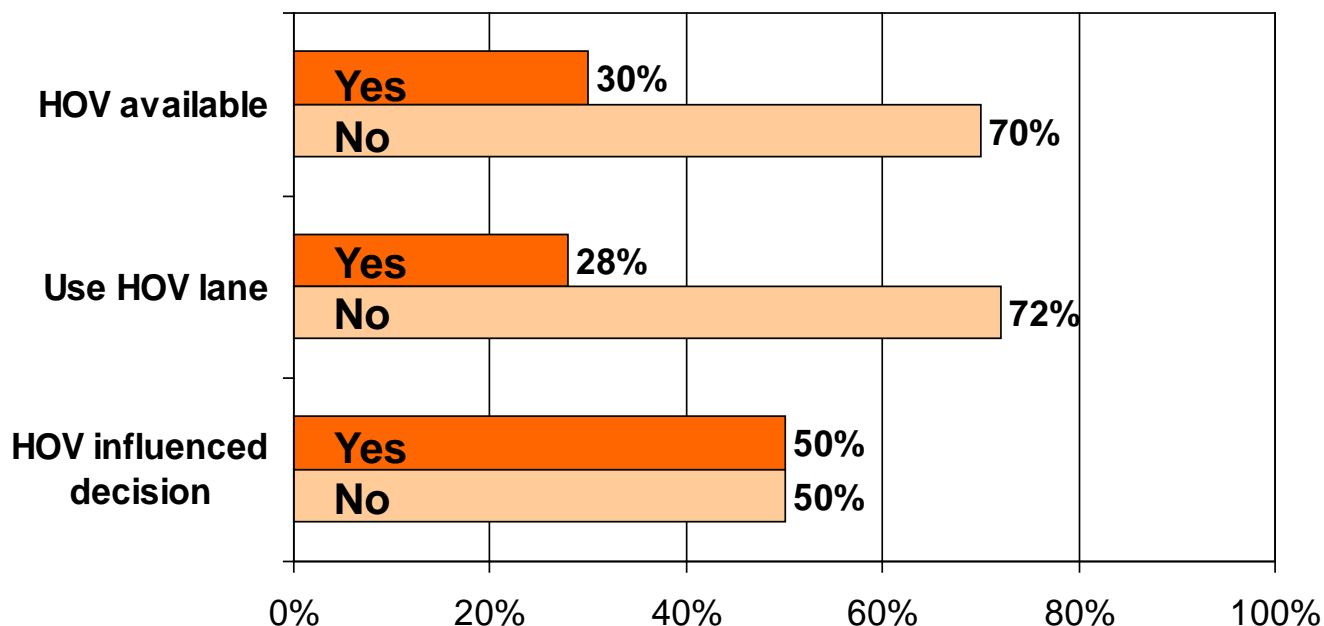
5.0-9.9 mi
n = 455

10.0 mi or more
n = 429

Q15. Now thinking about LAST week, how did you get to work each day ...?
Q44a About how far from your home is the nearest bus stop?

Three in Ten Commuters Said there was an HOV Lane Along their Route to Work

A quarter of these commuters used the lanes and half (50%) of HOV users said availability of the HOV lane influenced their decision to use an alternative mode.



HOV lane available
n = 6,050

Use HOV lane
n = 1,763

HOV lane influenced decision
n = 569

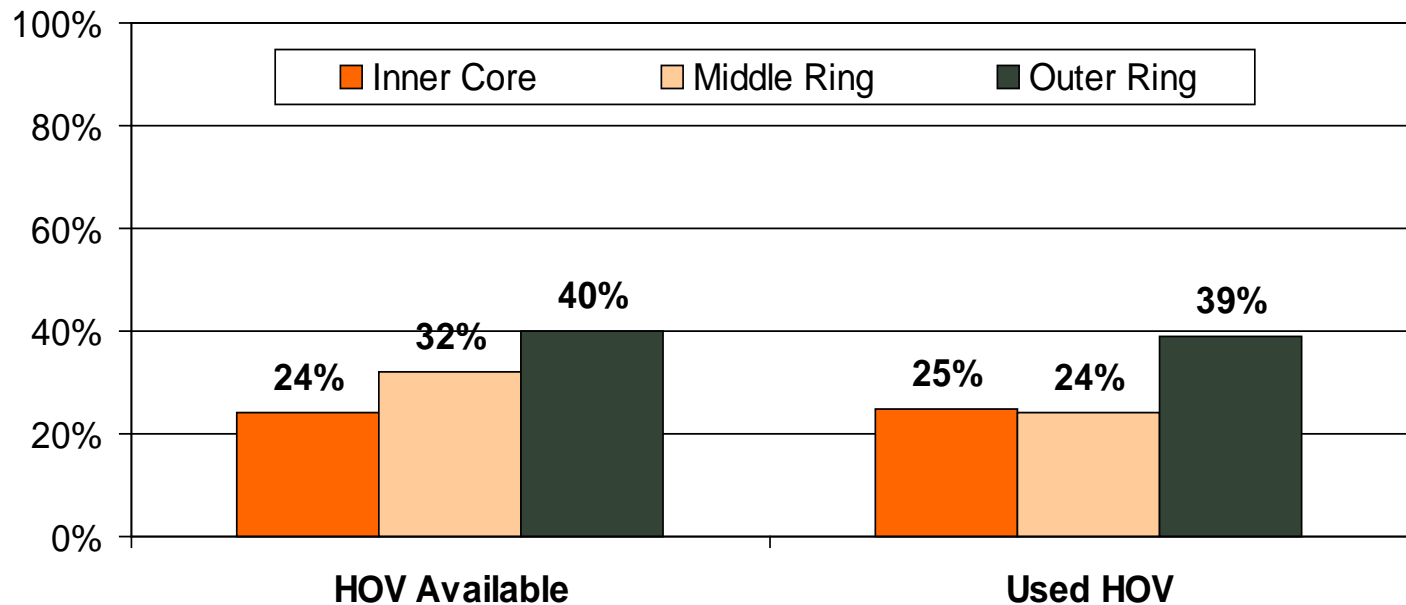
Q46 Is there a special HOV (High Occupancy Vehicle) lane that can be used only by carpools, vanpools and buses along your route to work?

Q47 Do you ever use the HOV lane to get to or from work?

Q51 Did the HOV lane influence your decision to use your current way of commuting?

Availability and Use of HOV by Area of Region

Commuters who lived in outer jurisdictions were more likely to have HOV lanes available on their route to work and were more likely to use them, when they were available. Commuters in the Inner Core and Middle Rings used HOV lanes at about the same rate.



HOV lane available

Core

n = 1,637

Middle Ring

n = 1,651

Outer Ring

n = 2,760

Use HOV lane

Core

n = 483

Middle Ring

n = 487

Outer Ring

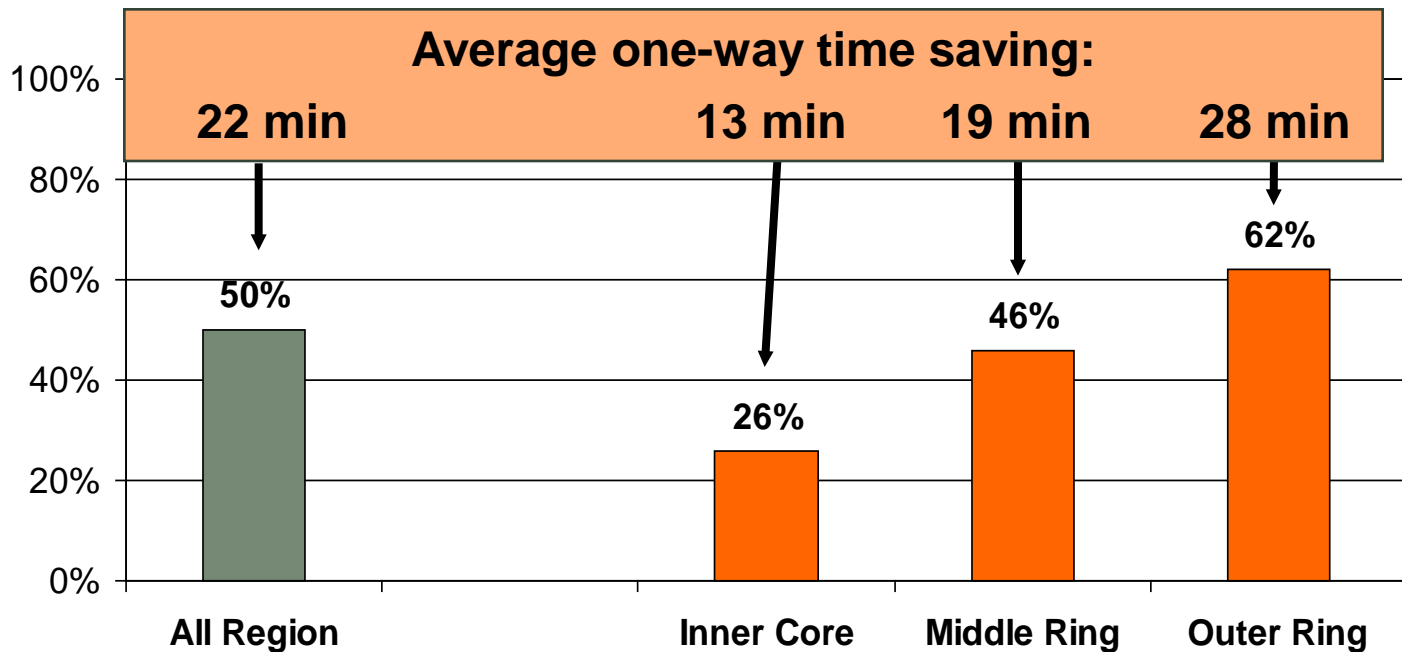
n = 787

Q46 Is there a special HOV (High Occupancy Vehicle) lane that can be used only by carpools, vanpools and buses along your route to work?

Q47 Do you ever use the HOV lane to get to or from work?

HOV Lanes Had Greater Mode Influence for Commuters in the Middle/Outer Rings

Nearly half of HOV users who lived in the Middle Ring and 62% who lived in the Outer Ring said the HOV lane had influenced their decision to use alternative modes. These commuters had greater time saving from HOV lanes than did Core residents.



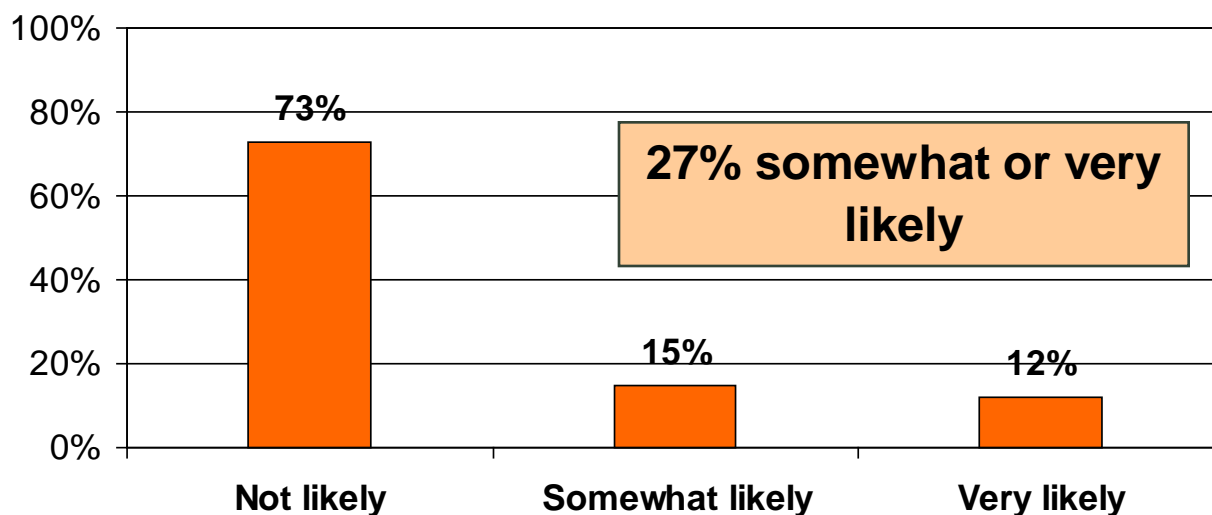
HOV lane influence
 Core
 n = 123
 Middle Ring
 n = 133
 Outer Ring
 n = 283

HOV lane time saving
 Core
 n = 103
 Middle Ring
 n = 121
 Outer Ring
 n = 262

Q50 How much time does the HOV lane save you in your one-way trip to or from work?
 Q51 Did the HOV lane influence your decision to use your current way of commuting?

27% of Drive Alone Commuters would Consider Ridesharing to Use HOT Lanes for Free

Commuters who drove alone were asked how likely they would be to try carpooling or vanpooling if carpools/vanpools traveled for free or a reduced rate on High Occupancy Toll (HOT) lanes. A quarter were somewhat or very likely to try.

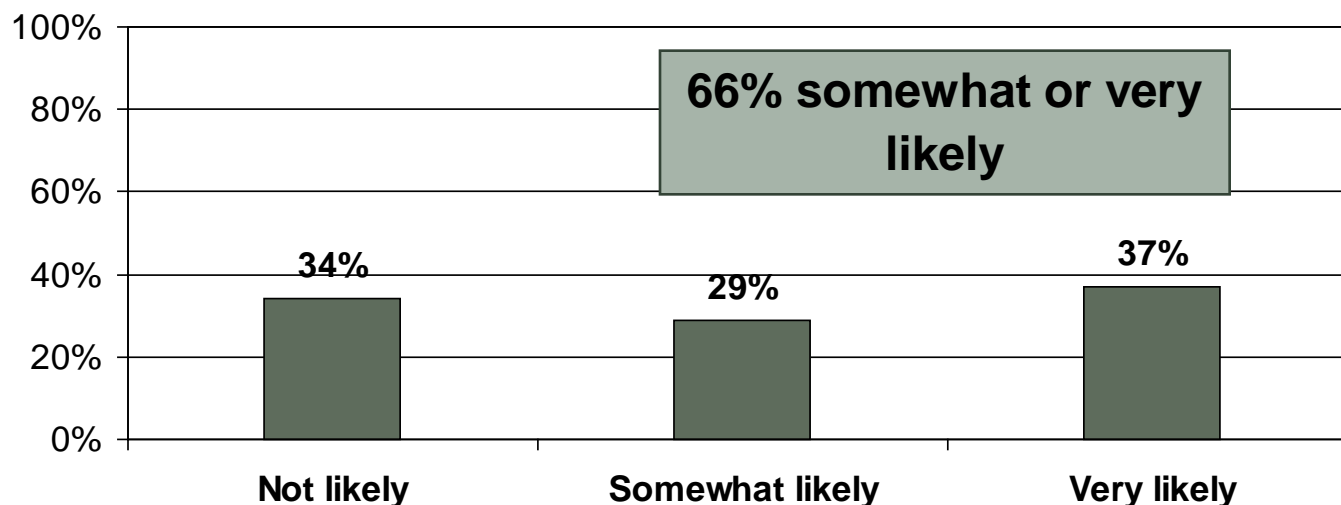


Q51a Several jurisdictions in the Washington region are building or considering building toll roads. If you could use one of these roads for your trip to work and carpools and vanpools traveled for free or for a reduced toll, how likely would you be to start carpooling or vanpooling to use these roads?

Drive alone
commuters
n = 5,368

Two-Thirds of Ridesharers would Register their CP/VP to Use HOT Lanes for Free

Commuters who carpooled/vanpooled to work were asked how likely they would be to register their carpool/vanpool if registered carpools/vanpools traveled for free or a reduced rate on High Occupancy Toll (HOT) lanes. Two-thirds were somewhat or very likely to register.



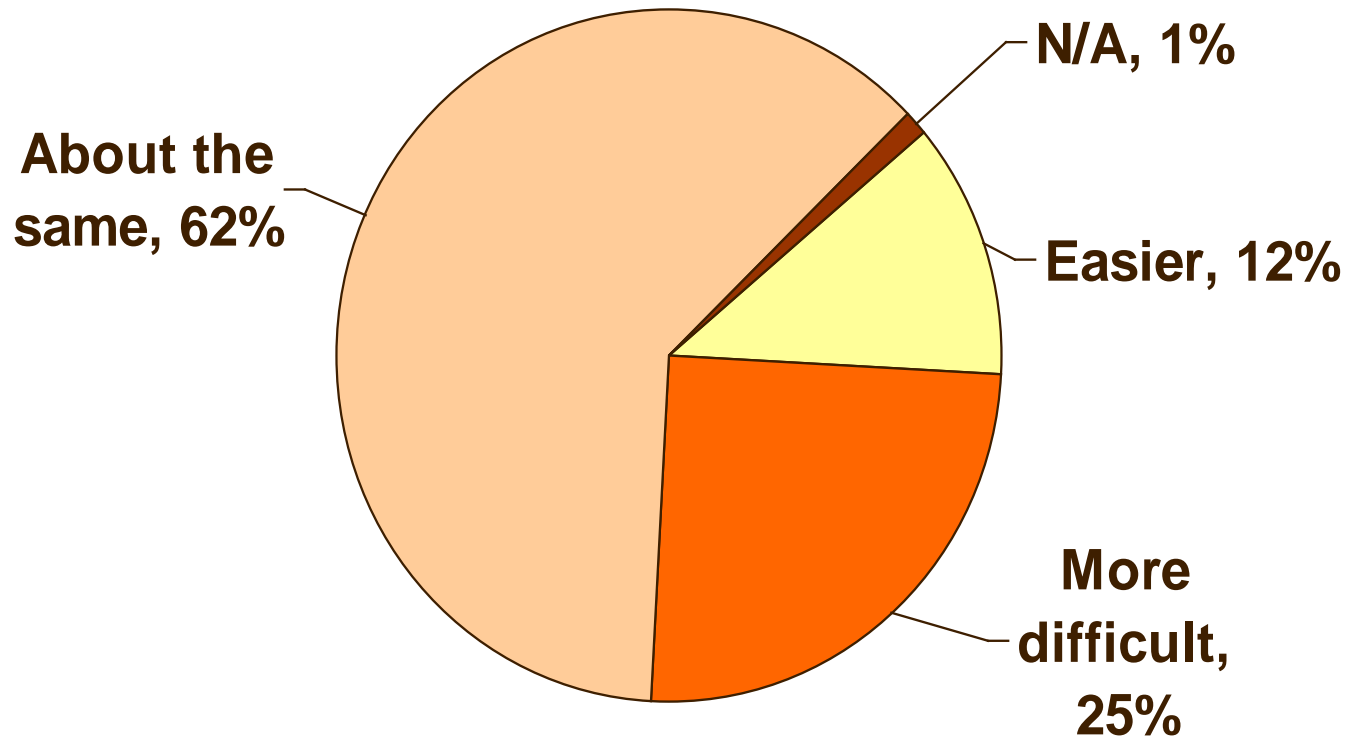
Q51b Several jurisdictions in the Washington region are building or considering building toll roads. If you could use one of these roads for your trip to work and carpools and vanpools that registered with a regional commute organization could use these roads for free or for a reduced toll, how likely would you be to register your carpool or vanpool?



Commuter Ease and Satisfaction



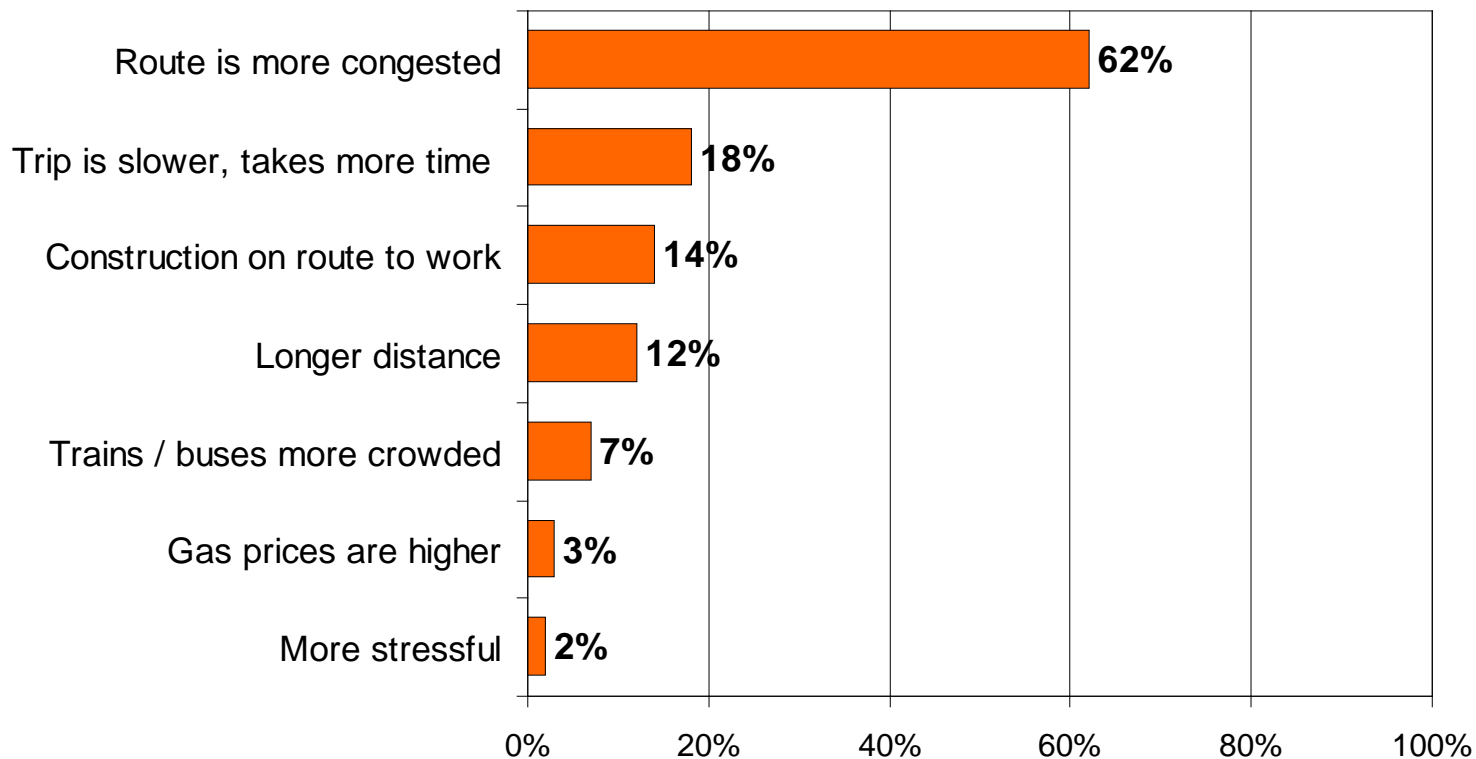
A Quarter of Commuters Said their Commute was More Difficult than a Year Ago, While 12% Have an Easier Commute



Q57 – Would you say your commute is easier, more difficult, or about the same now as it was one year ago?

Respondents who Had More Difficult Commutes Overwhelmingly Said the Route was More Congested

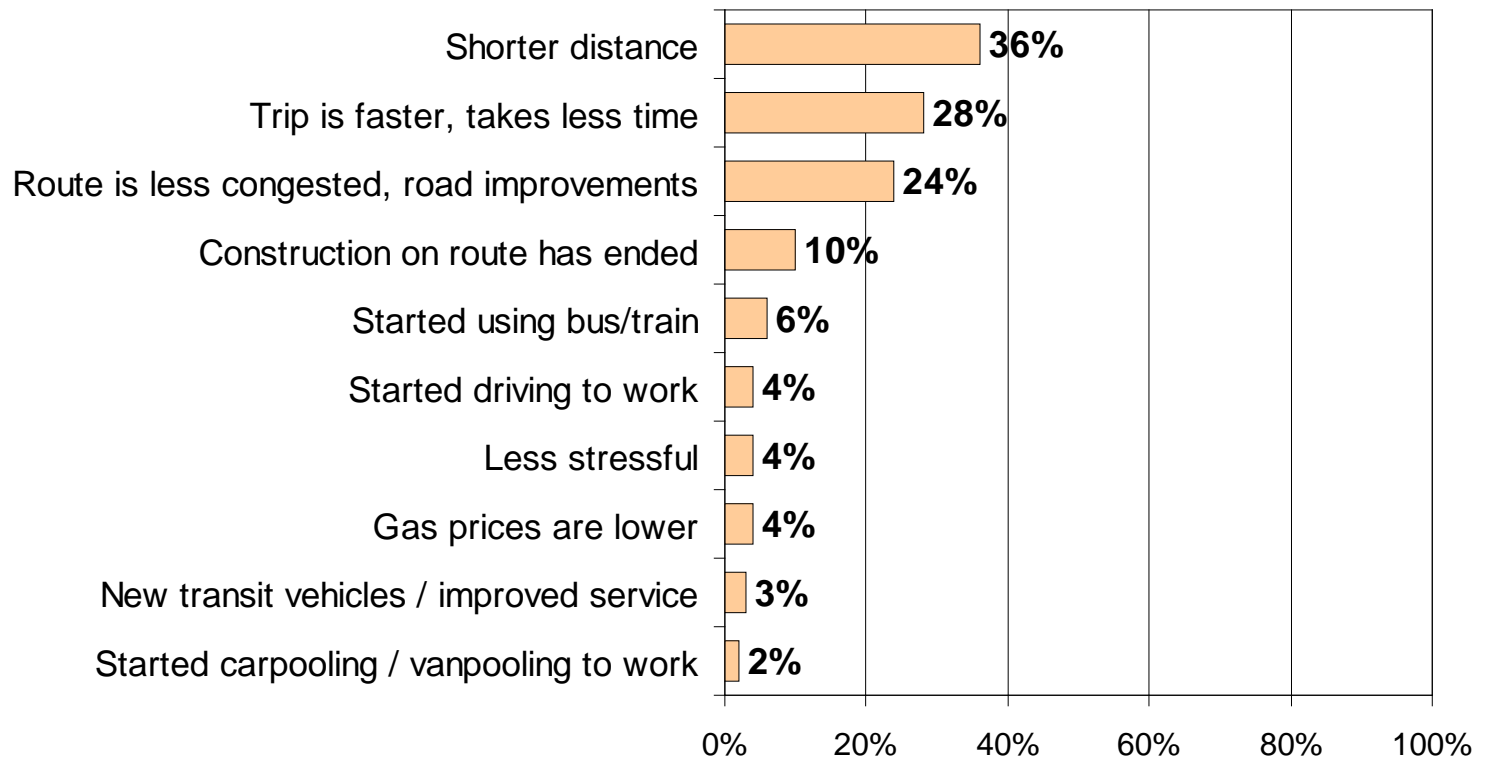
14% noted construction along the route to work



Q59 In what way is your commute more difficult?

Respondents who Had Easier Commutes Said the Distance was Shorter, the Time Faster, or the Route Less Congested

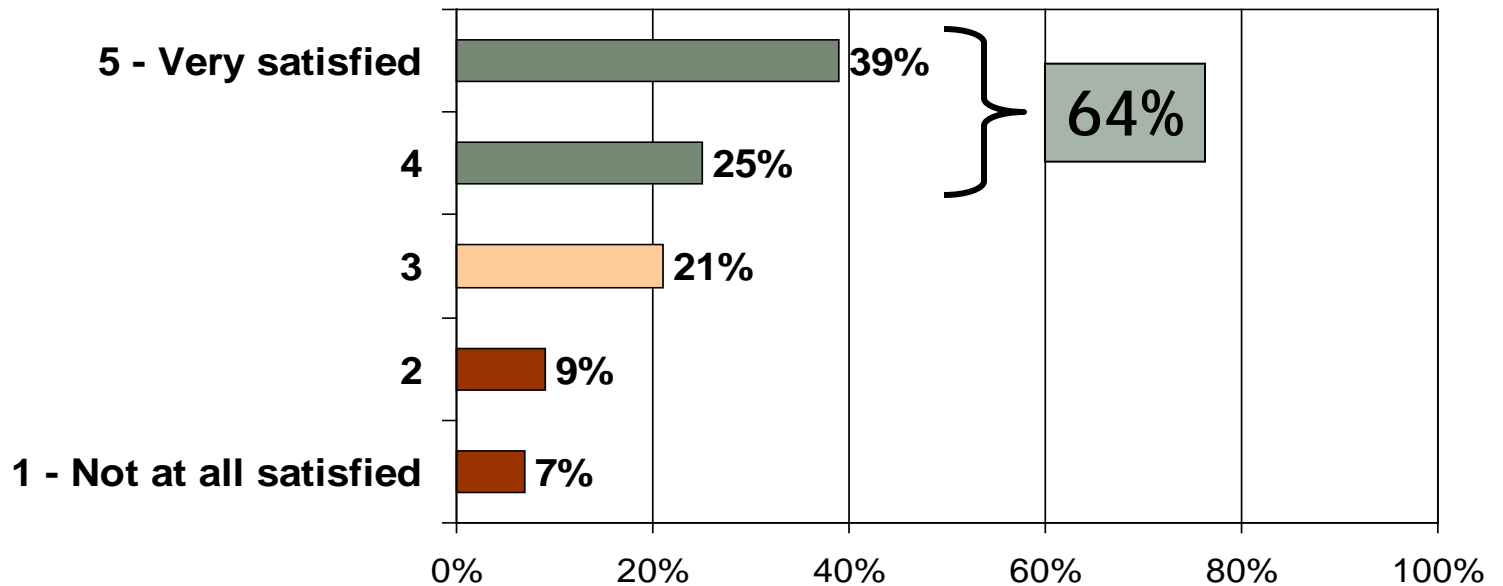
10% noted that construction along the route had been completed



Q58 In what way is your commute easier?

Two-thirds of Commuters said they were Satisfied with their Commute

Commuter satisfaction was related to the ease or difficulty of the commute. 78% of respondents who had an easier commute than last year and 72% who said their commute had not changed were satisfied with their commute, compared to only 35% who said their commute had become more difficult.



Q56m - Overall, how satisfied are you with your trip to work?

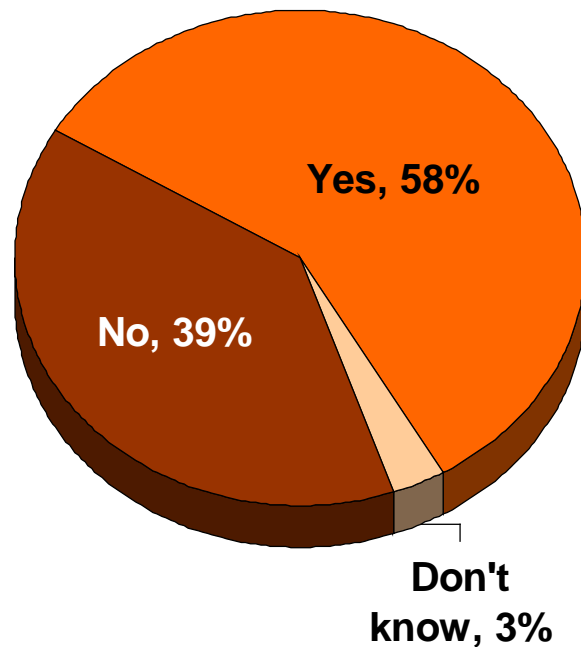
n = 6,033



Ads / Awareness

Six in Ten Respondents Recalled Hearing/Seeing Commute Ads in the Past Year

This was Higher than the 52% Recall Noted in the 2007 Survey



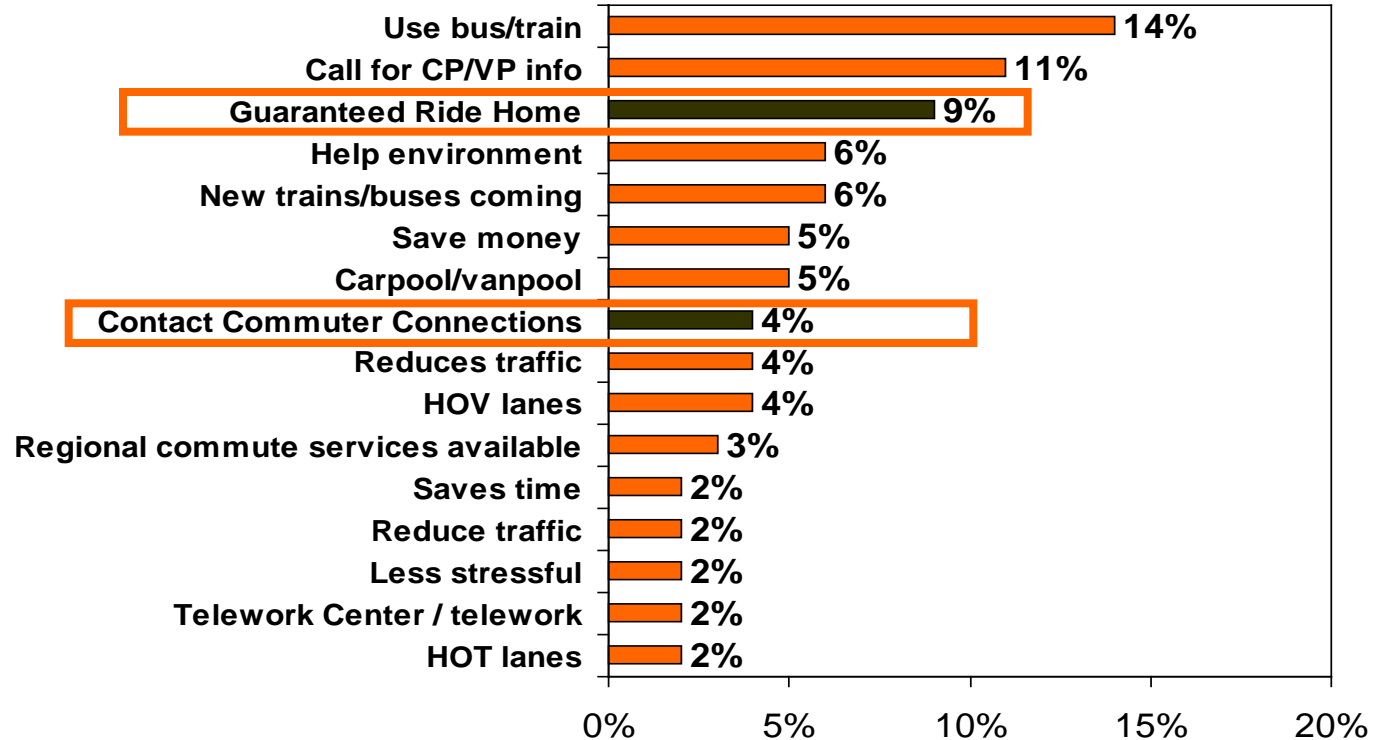
44% who recalled ads could name the sponsor:

- 19% named WMATA
- 13% named Commuter Connections or COG

Q61 Have you heard, seen, or read any advertising about commuting in the past year?

70% of Respondents who were Aware of Ads Could Name a Specific Message

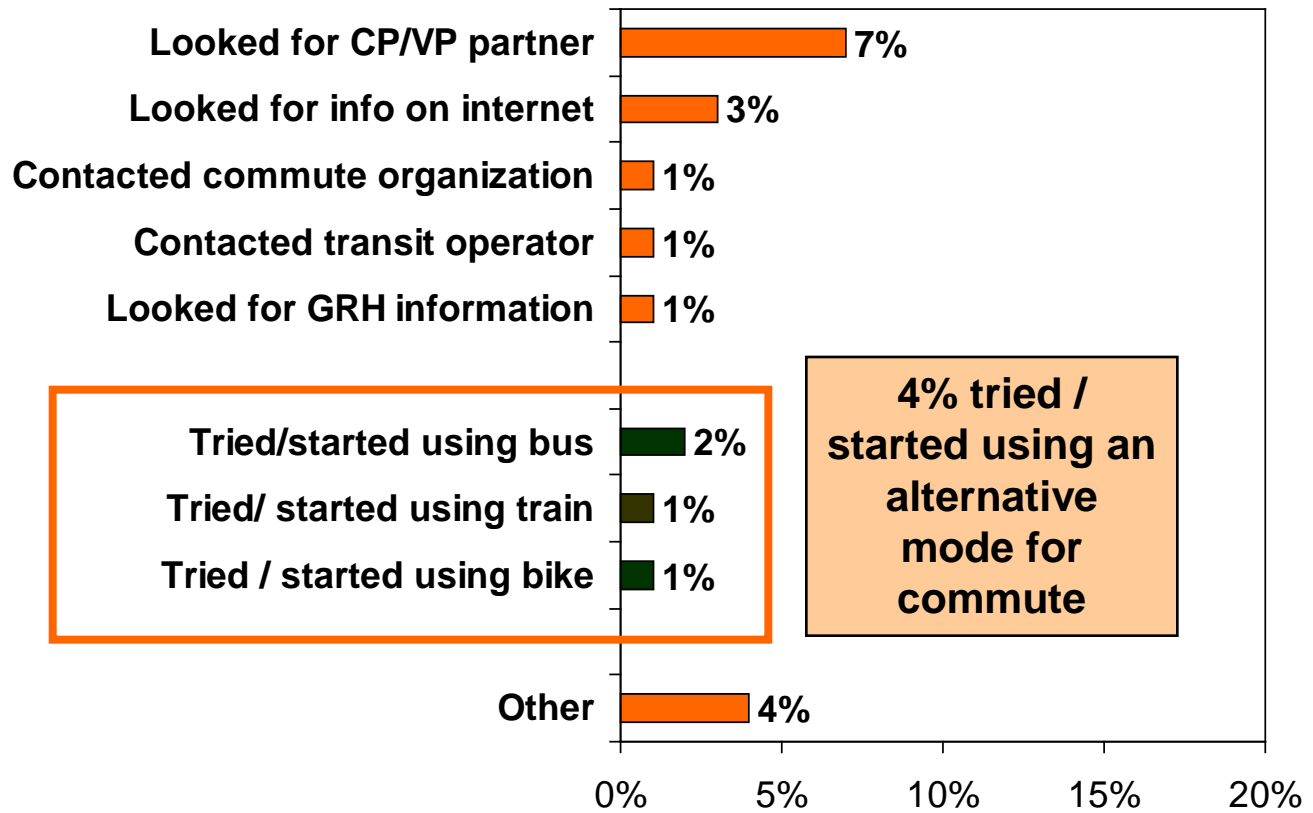
Most cited general rideshare messages or messages about benefits of using alternative modes. 9% mentioned Guaranteed Ride Home and 4% said “contact Commuter Connections.”



Commute Changes After Ads

A small percentage of respondents who said they were likely to make a mode change after hearing ads took action to change their commute.

83% who took action said the ad encouraged the action



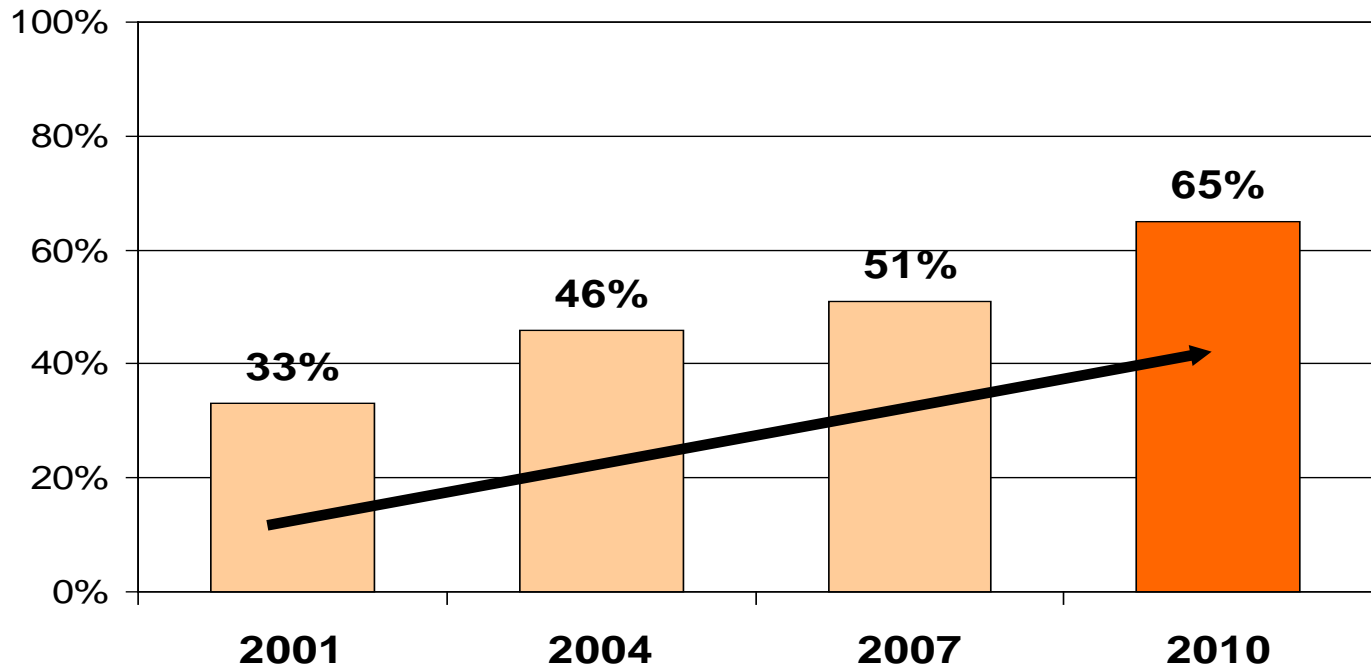
Q66 After seeing or hearing this advertising, did you take any actions to try to change how you commute?



Regional and Local
Commute Services

Awareness of Regional Commute Information Resources has Grown Since 2001

In 2010, 65% of respondents said there was a telephone number or web site for commute information, higher than the 51% who knew of these resources in 2007 and twice as high as the 33% of respondents who knew of these resources in 2001.



2001 SOC
N = 7,200

2004 SOC
N = 7,200

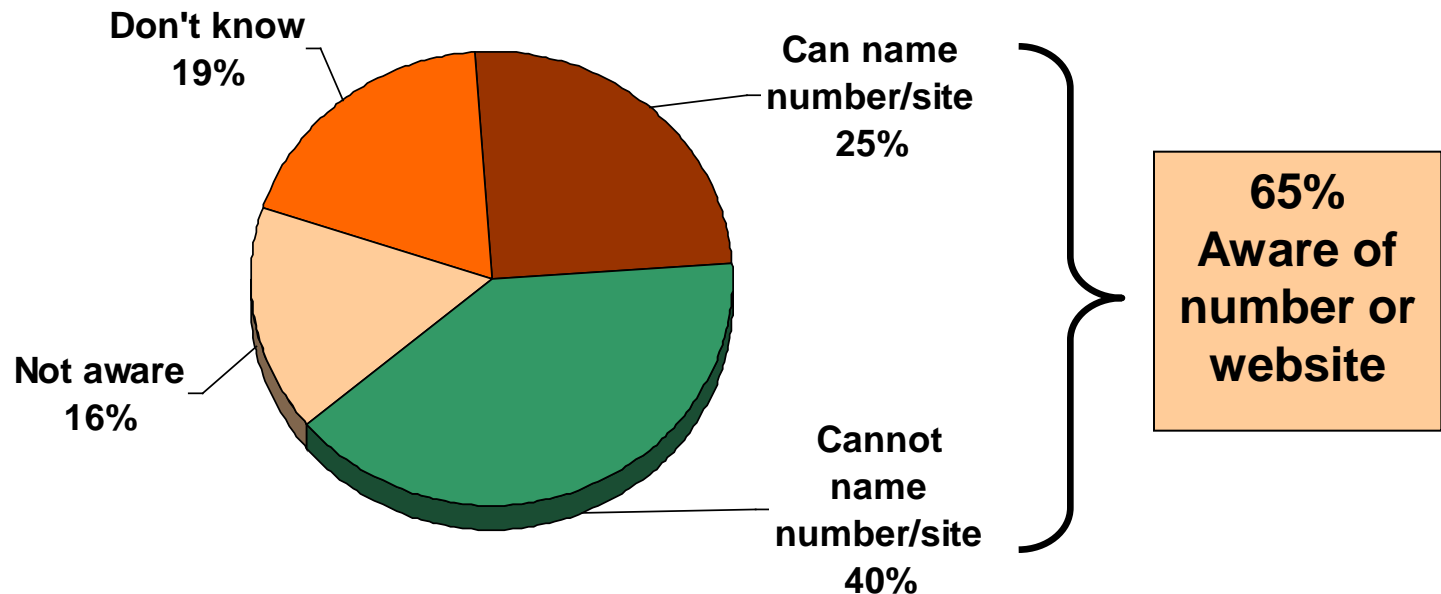
2007 SOC
n = 6,600

2010 SOC
n = 6,629

Q81 Is there a phone number or website you can use to obtain information on ridesharing, public transportation, HOV lanes, and telecommuting in the Washington region?

Awareness of Commute Info Resource

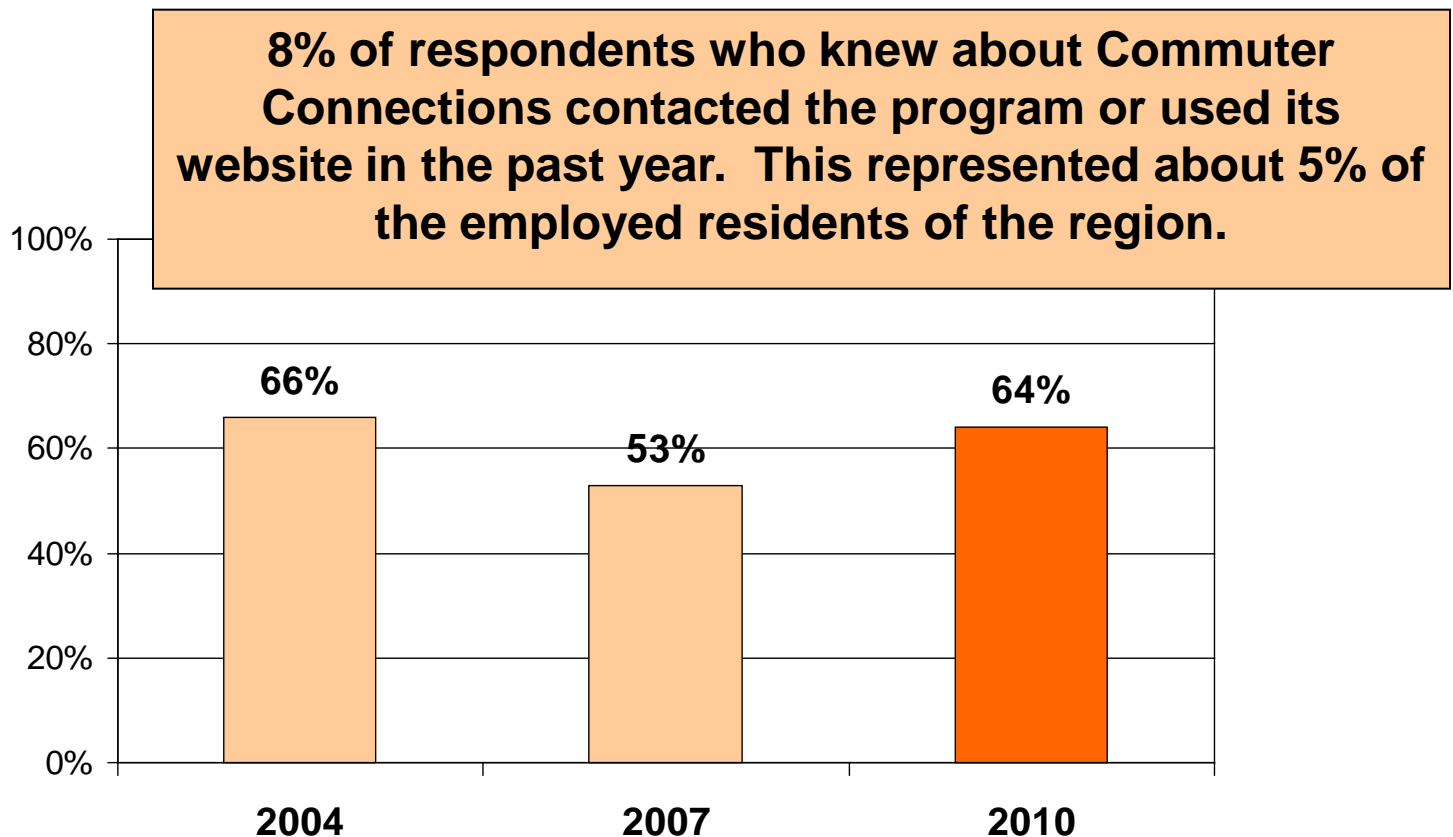
About 25% of respondents could name a specific number or web site; higher than the 21% who could name a source in 2007. Seventeen percent named a Metro/WMATA phone number or website and four percent named a phone number or website administered by **Commuter Connections**.



Q81 Is there a phone number or website you can use to obtain information on ridesharing, public transportation, HOV lanes, and telecommuting in the Washington region? What is it?

Awareness of Commuter Connections

Awareness of Commuter Connections has grown since 2007, from 55% to 64%. This is about the same percentage as knew of Commuter Connections in 2004.



2004 SOC
n = 7,200

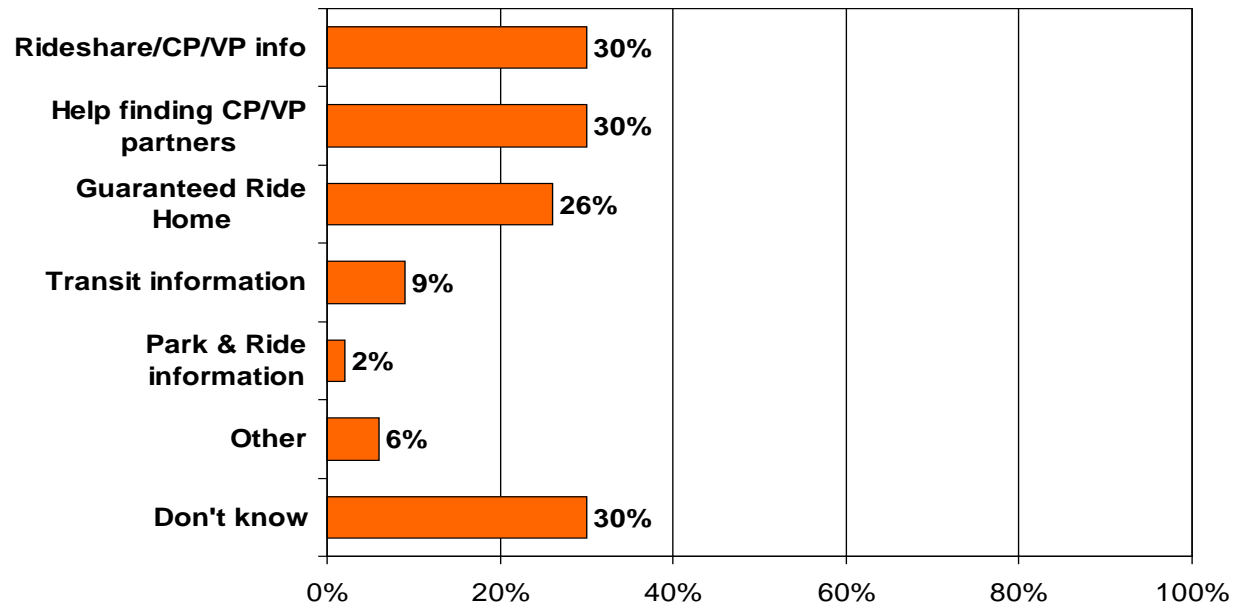
2007 SOC
n = 6,600

2010 SOC
n = 6,629

Q86 Have you heard of an organization in the Washington region called Commuter Connections?

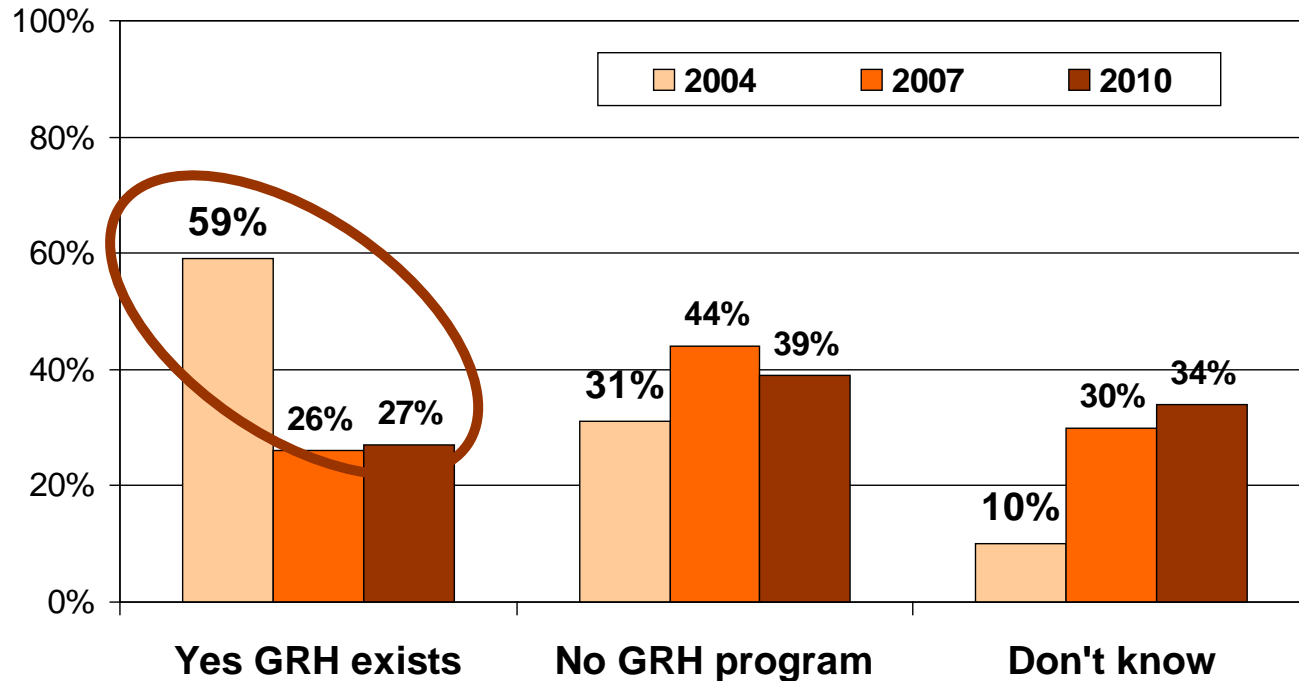
Respondents Largely Cited Services that Commuter Connections Actually Does Provide

Six in ten knew the program offered either general rideshare information (30%) or help finding a carpool or vanpool partner (30%). This was higher awareness for rideshare assistance compared to 2007 (49%). Awareness of the GRH program also grew slightly, from 23% in 2007 to 26% in 2010.



Awareness of Regional GRH

A quarter (27%) of all respondents knew that there was a regional GRH program. This was about the same share as knew of GRH in 2007 (26%), but a large decrease from the 59% who said they knew of such a program in 2004.



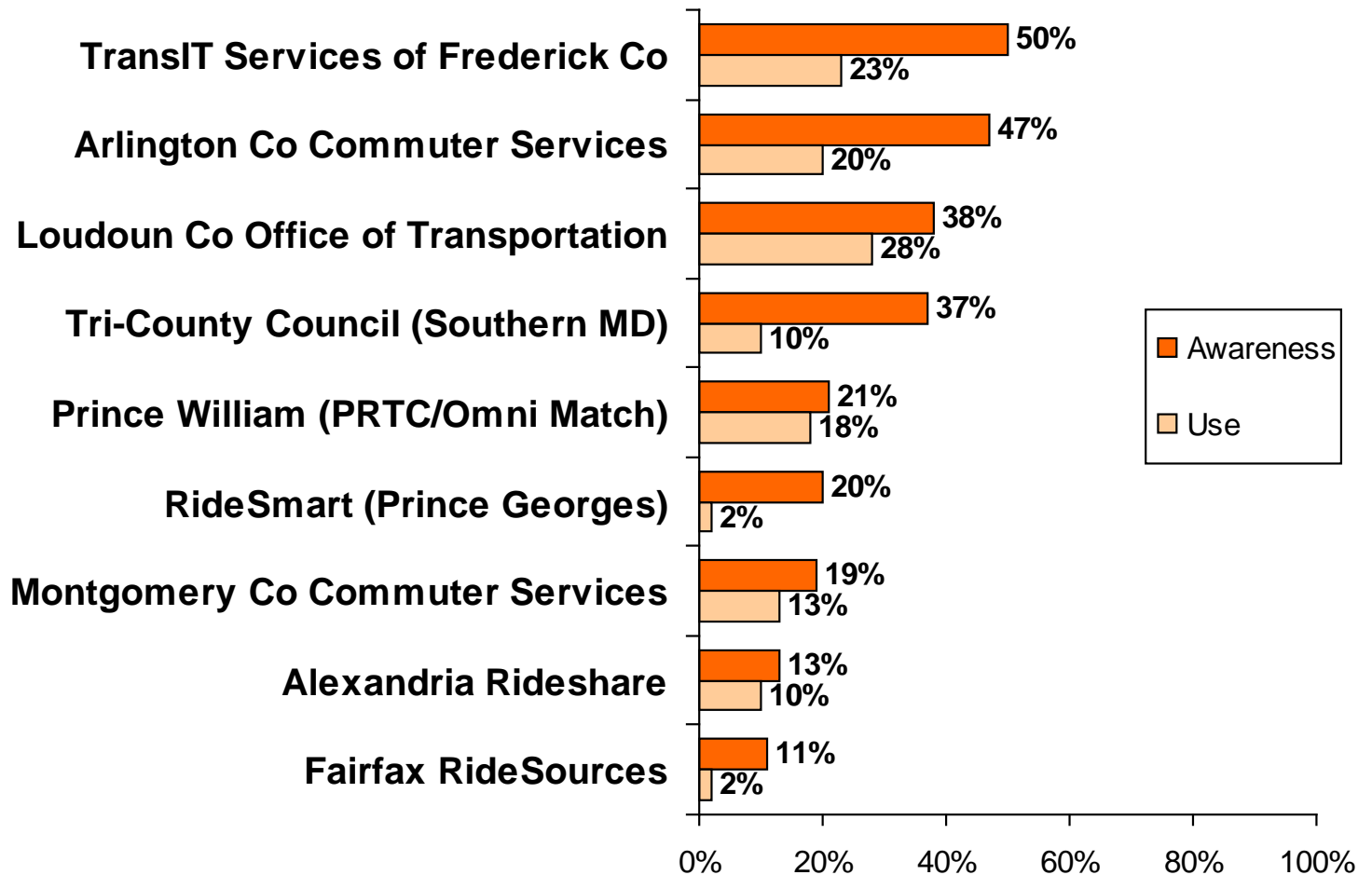
2004 SOC
n = 6,867

2007 SOC
n = 6,071

2010 SOC
n = 6,084

Q102 Do you know if there is a regional GRH or Guaranteed Ride Home program available in the event of unexpected emergencies and unscheduled overtime for commuters who rideshare or use public transportation?

Awareness of Local Services Ranged from 11% to 50%; Use Ranged from 2% to 23%



Frederick
n = 732

Arlington
n = 958

Loudoun
n = 660

Southern
Maryland
n = 1,224

Prince William
n = 1,244

Prince
George's
n = 894


Montgomery
n = 928

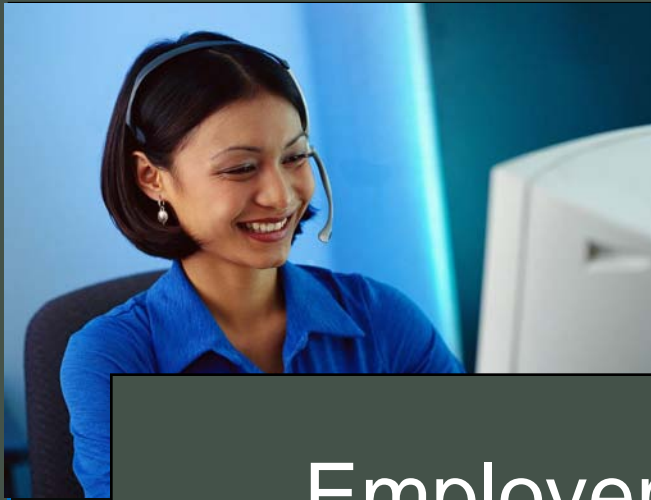
Alexandria
n = 732

Fairfax
n = 1,253

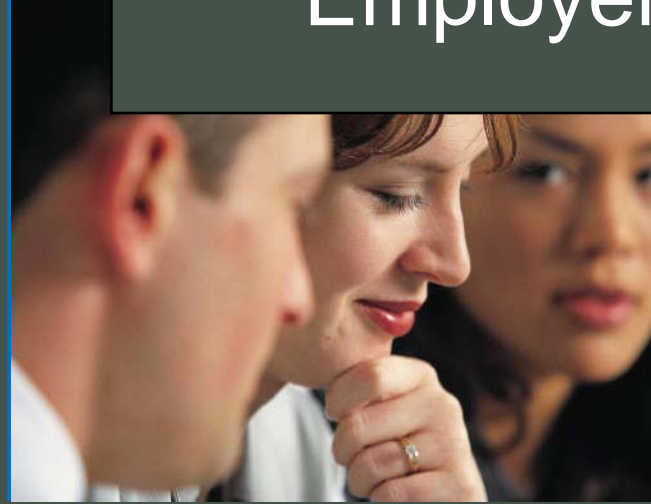


Use of Local Services

- Use of local programs was generally higher for programs in **outer jurisdictions**. This is likely because outer jurisdiction commuters encounter more congestion in their travel and have longer commute distances, which would encourage them to seek options for travel to work.
 - Use also was higher for programs associated with **transit agencies** (Frederick, Loudoun, Prince William). This connection might be due to higher visibility of the services, but 65% of respondents who contacted a local program said they were seeking transit information.
 - In the inner jurisdictions, transit assistance is provided by transit organizations that are separate from the local commute assistance program.
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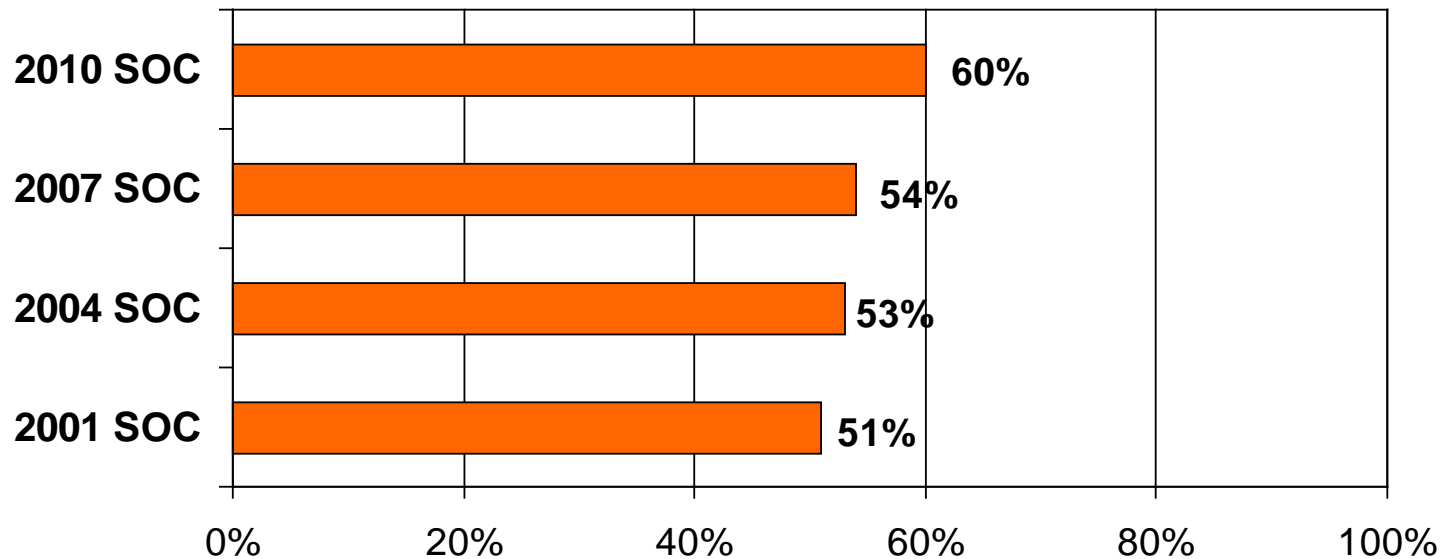


Employer Services



Access to Employer Commute Services

–Six in ten respondents (60%) who traveled to a worksite away from home said their employers offered one or more alternative mode incentive or support services to employees at their worksites. This was slightly higher than the 54% who noted having worksite services in 2007.



2010 SOC
n = 5,899

2007 SOC
n = 6,071

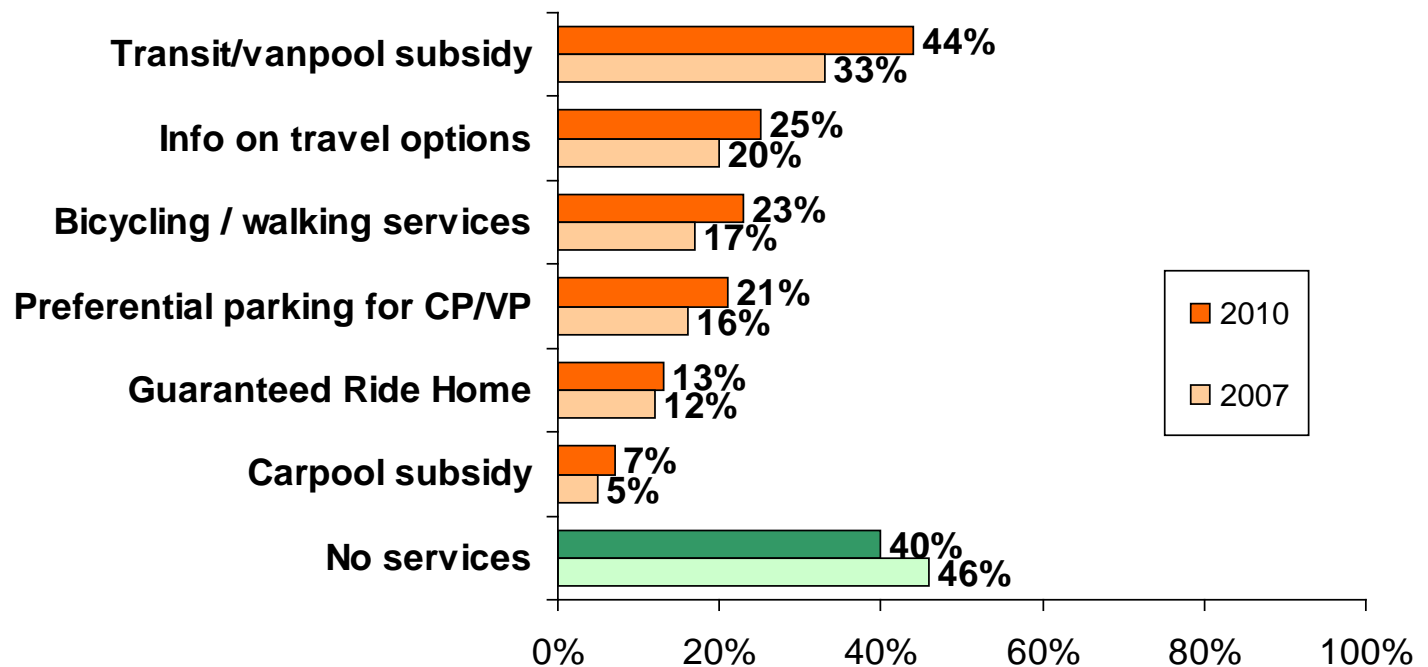
2004 SOC
n =

2001 SOC
n =

Q89 Next please tell me if your employer makes any of the following commute services or benefits available to you and, if they are available, have you used them. How about.... ,?

Employer-Provided Services

-The most commonly available service in 2010 was transit/vanpool subsidies, available to 44% of respondents. 25% had access to commute option information, services for bicyclists and walkers (23%), and preferential parking (21%). Availability of all services increased since 2007.



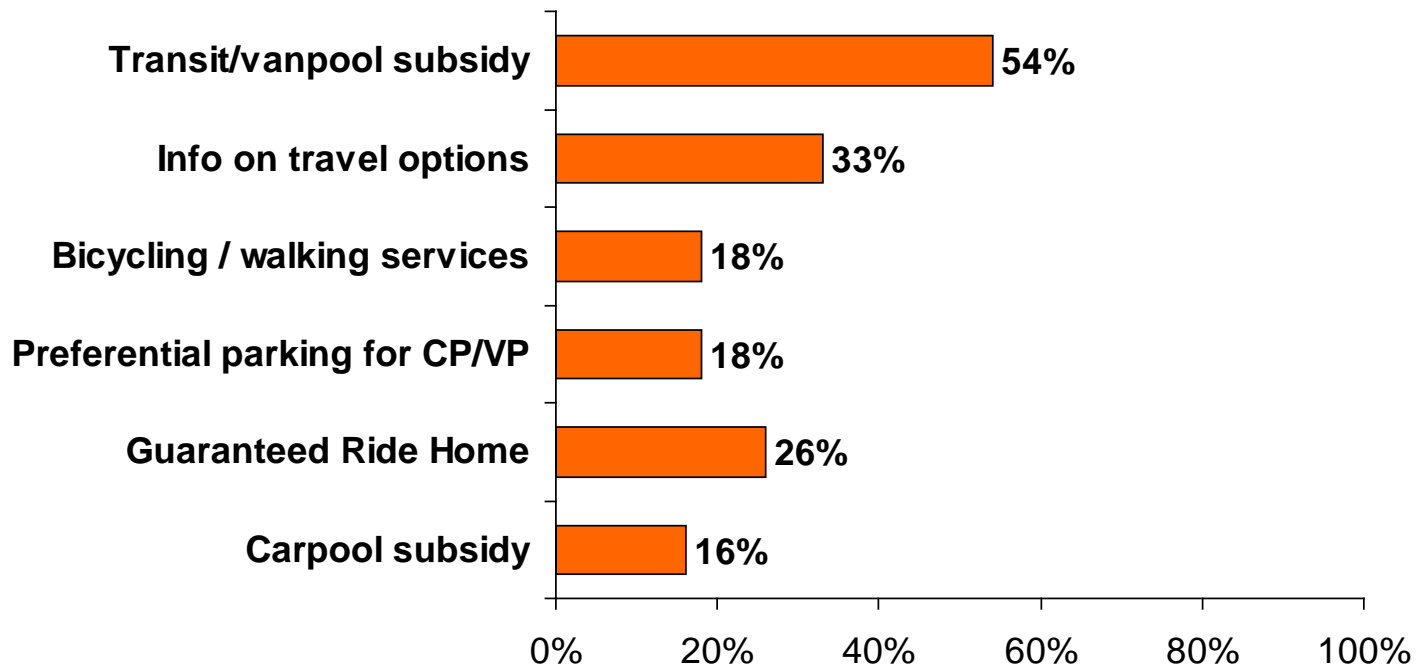
2010 SOC
n = 5,899

2007 SOC
n = 6,076

Q89 Next please tell me if your employer makes any of the following commute services or benefits available to you and, if they are available, have you used them. How about.... ,?

Employer Services Used

-The most widely used employer service also was transit / vanpool subsidies. They were used by 54% of the respondents who said they were available. A third (33%) of respondents who had access to transportation information had used it and 26% of respondents who had GRH had used that service.



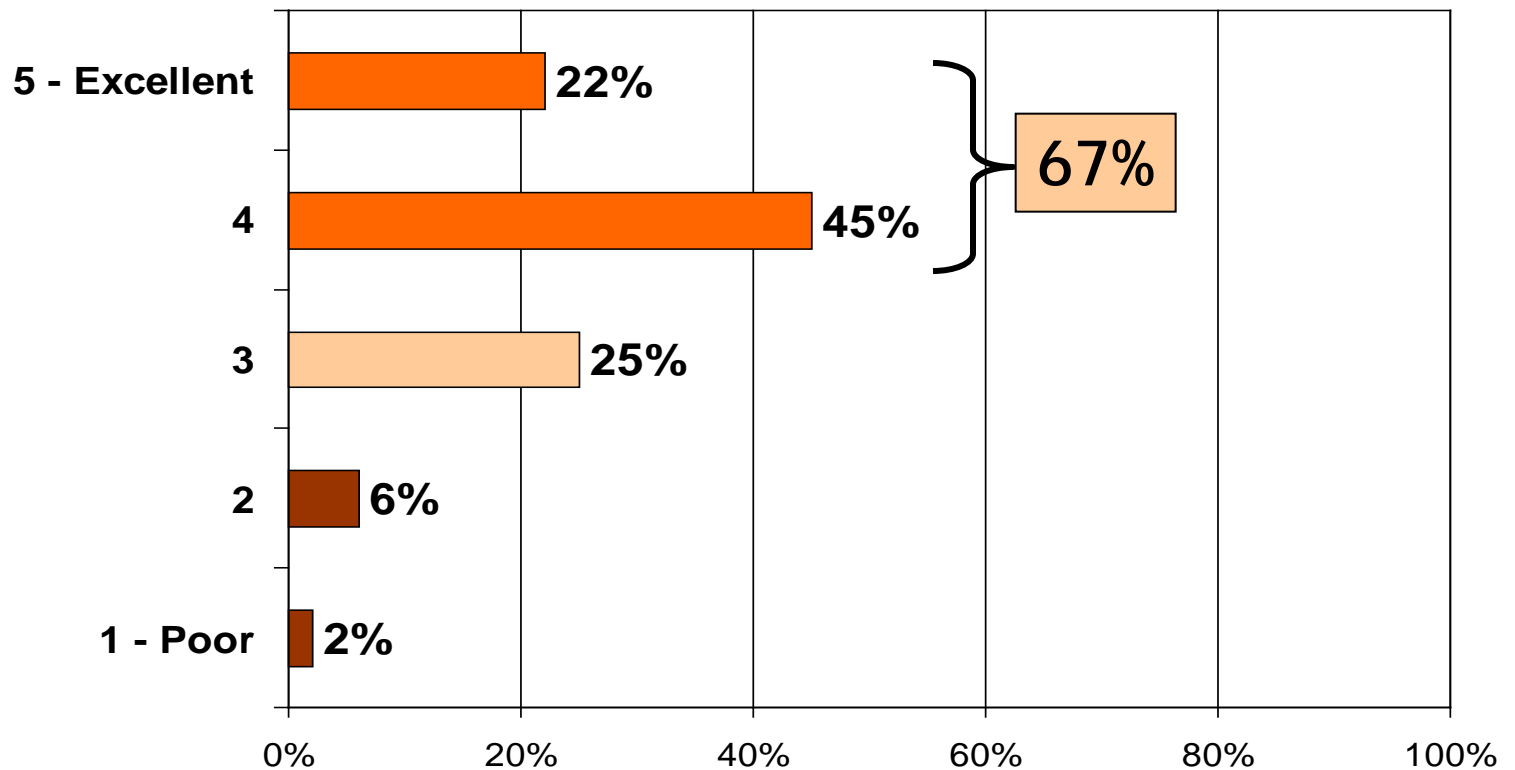
Q89 Next please tell me if your employer makes any of the following commute services or benefits available to you and, if they are available, have you used them. How about.... ,?



Transportation Satisfaction

Two-thirds of Residents Give High Ratings for Overall Quality of Life

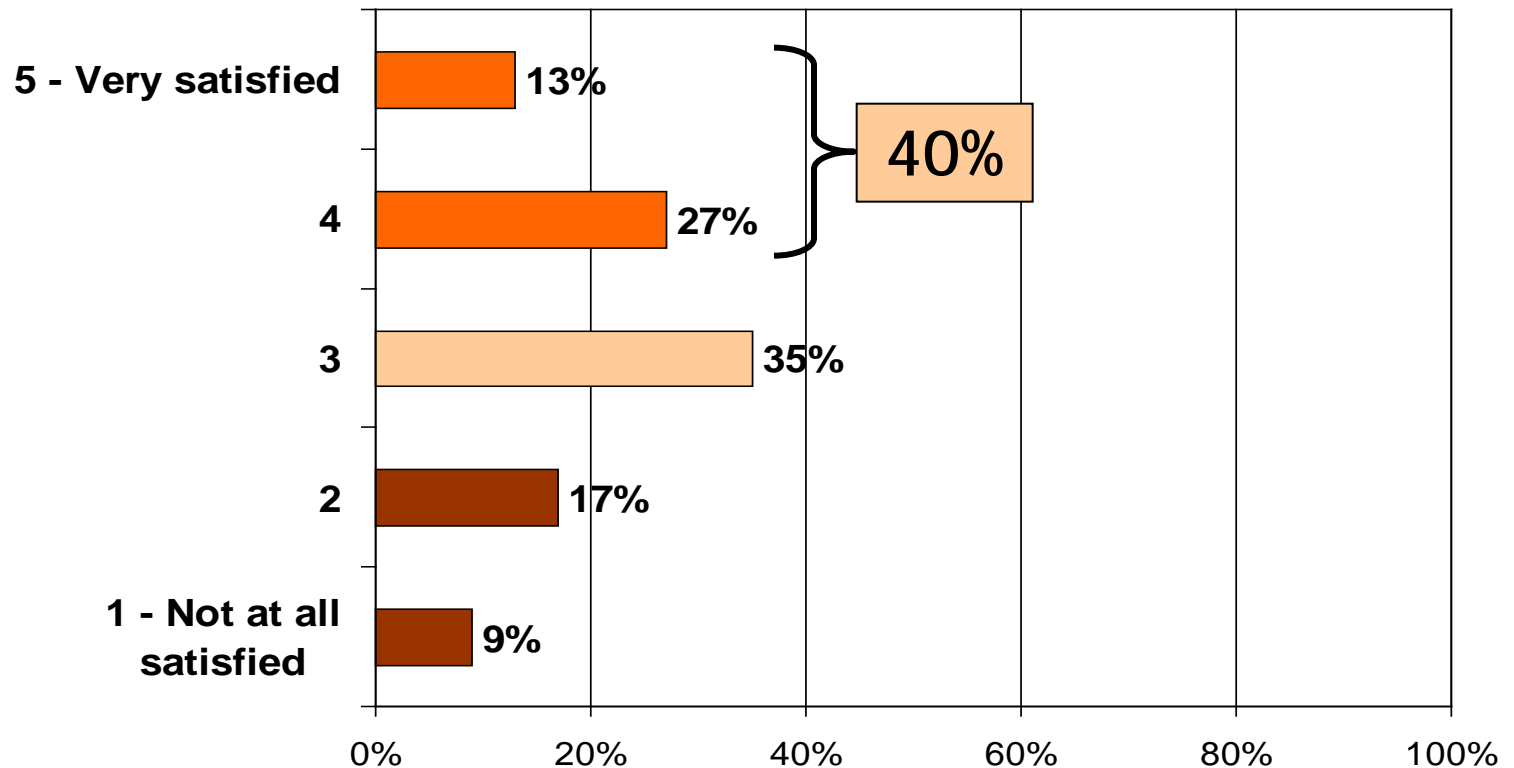
Only 8% gave a low rating of 1 or 2



Q105 Next, I have a few questions regarding quality of life and transportation in the Washington region. Overall, how would you rate the quality of life in the Washington region?

Commuters Were Less Satisfied with Transportation in the Region

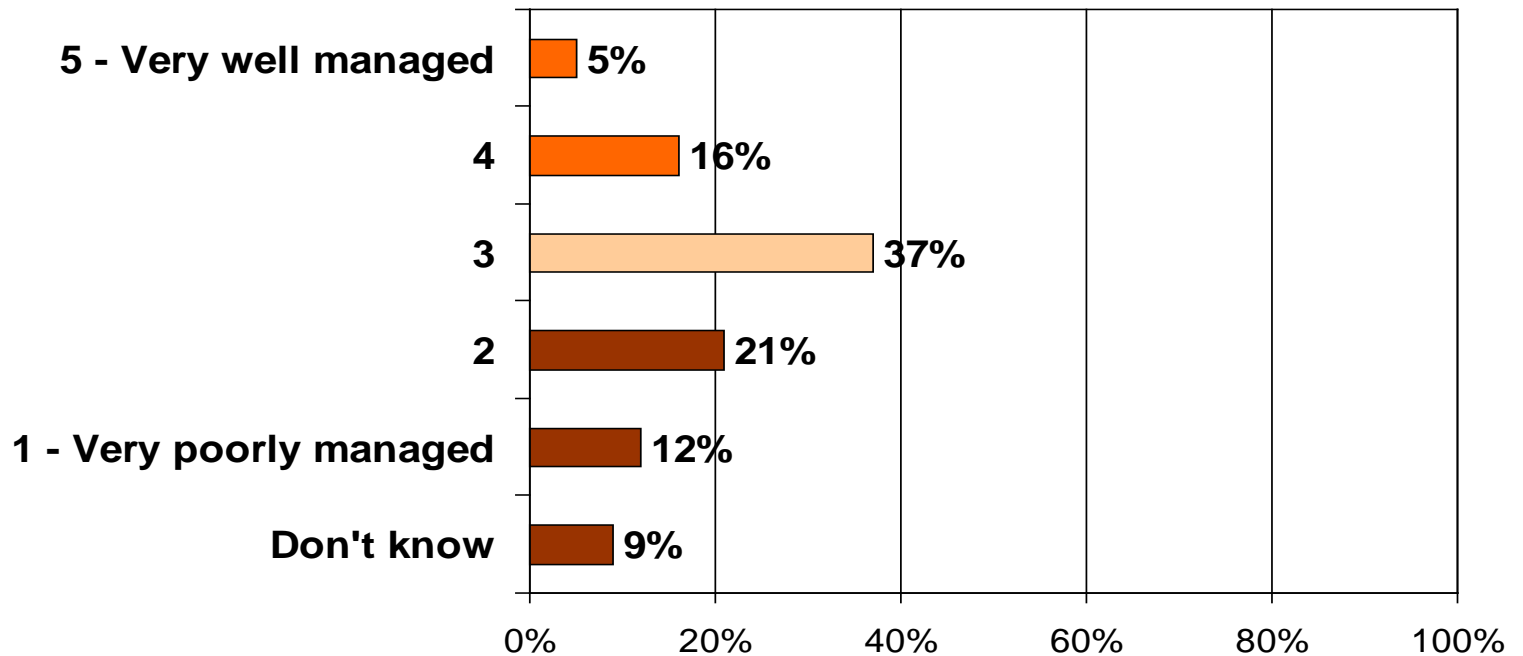
Only 40% were satisfied (rating of 4 or 5) and more than a quarter (26%) said they were not satisfied (rating of 1 or 2)



Q106 How satisfied you are with the transportation system in the Washington metropolitan region?

Operation of Regional Transportation System

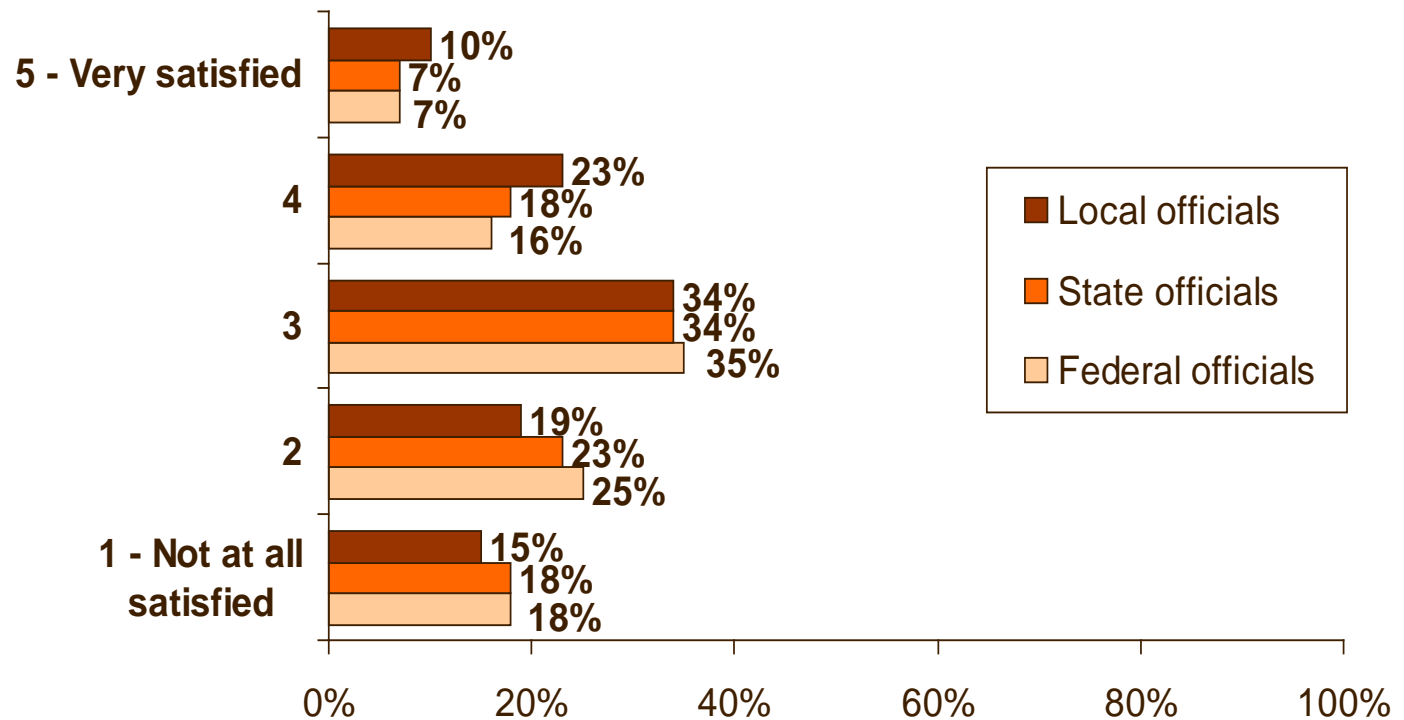
– Respondents gave generally low to moderate ratings for the management of the regional transportation system. Only 21% gave a rating of 4 or 5, where 5 meant “very well managed.” A greater share (33%) gave a rating of 1 or 2, where 1 meant “very poorly managed.”



Q107a How well do you think the operation of the regional transportation system is managed?

Elected Officials Attention to Transportation

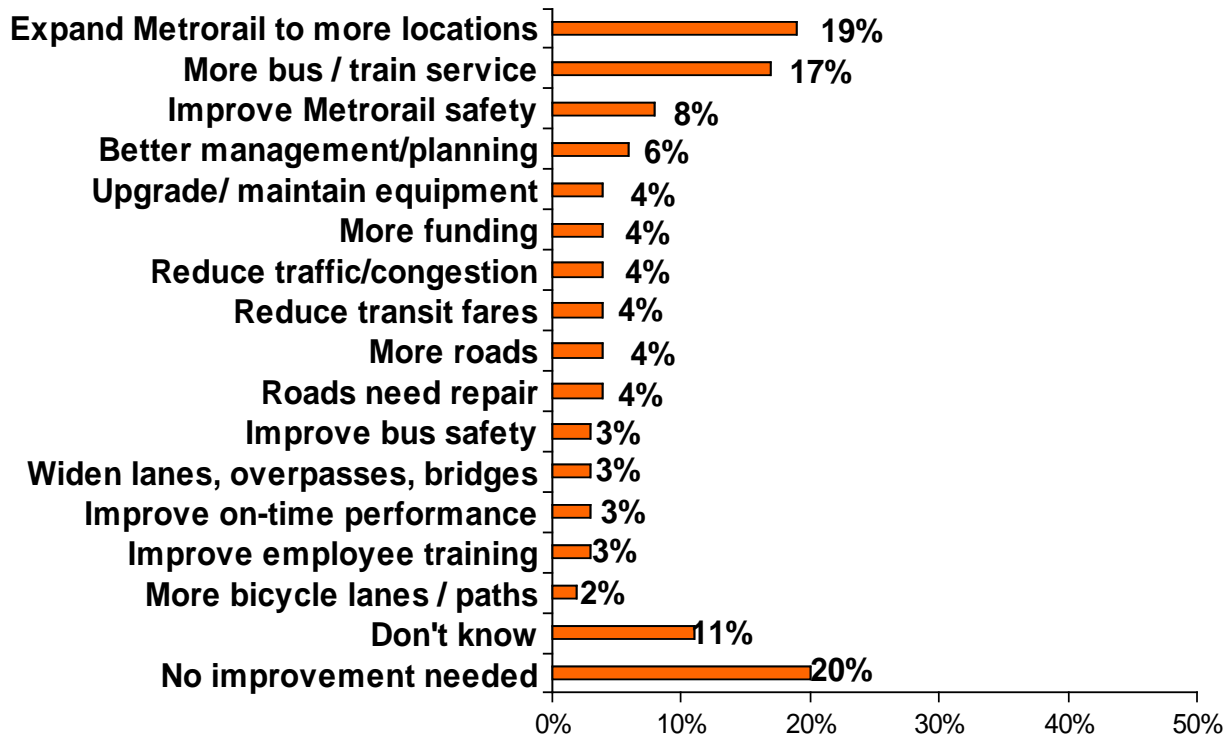
– Respondents also gave low to moderate rating for satisfaction with elected officials’ attention to transportation. Respondents seemed slightly more satisfied with the attention paid by local governments than attention of State and Federal officials.



Q107 How satisfied are you with the level of attention being paid to transportation needs by federal elected officials?

Recommendations to Improve Transportation

-Suggestions included the need to improve transit availability (36%), Metrorail safety (8%), fares (4%), and schedule (3%). Only 4% of respondents cited a need for more roads and 4% said the region needs to improve road repairs. About 8% cited a need for better regional planning or coordination between jurisdictions.



Q108 Do you have any recommendations for how the transportation system in the region needs to be improved?

Personal / Social Benefits of Rideshare

- What personal benefits do you believe people receive from using [carpool, vanpool, bus, or train]?
- What impact or benefits does a community or region receive when people use these types of transportation?



Personal health



Economics



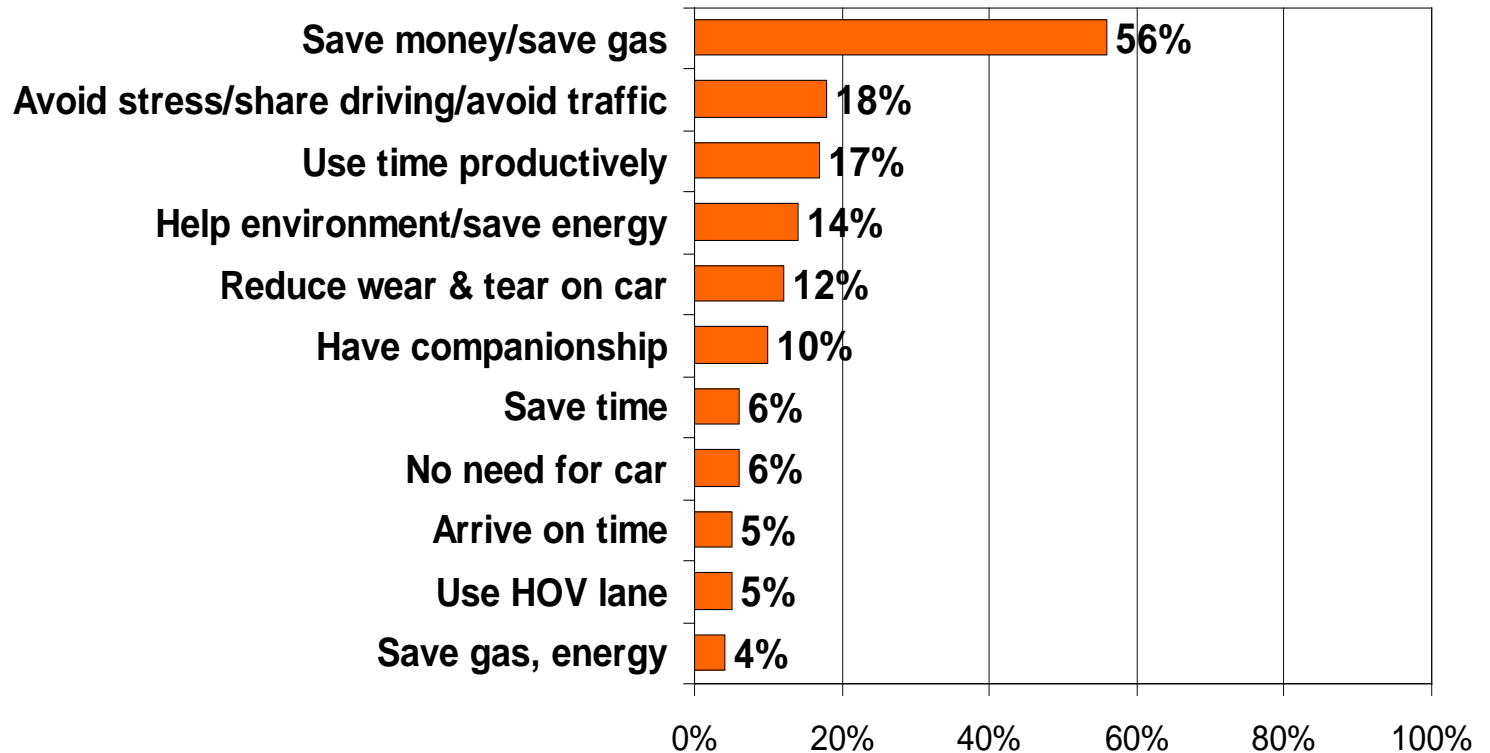
Congestion



Sustainability

90% of Respondents Cited Personal Benefits of Ridesharing

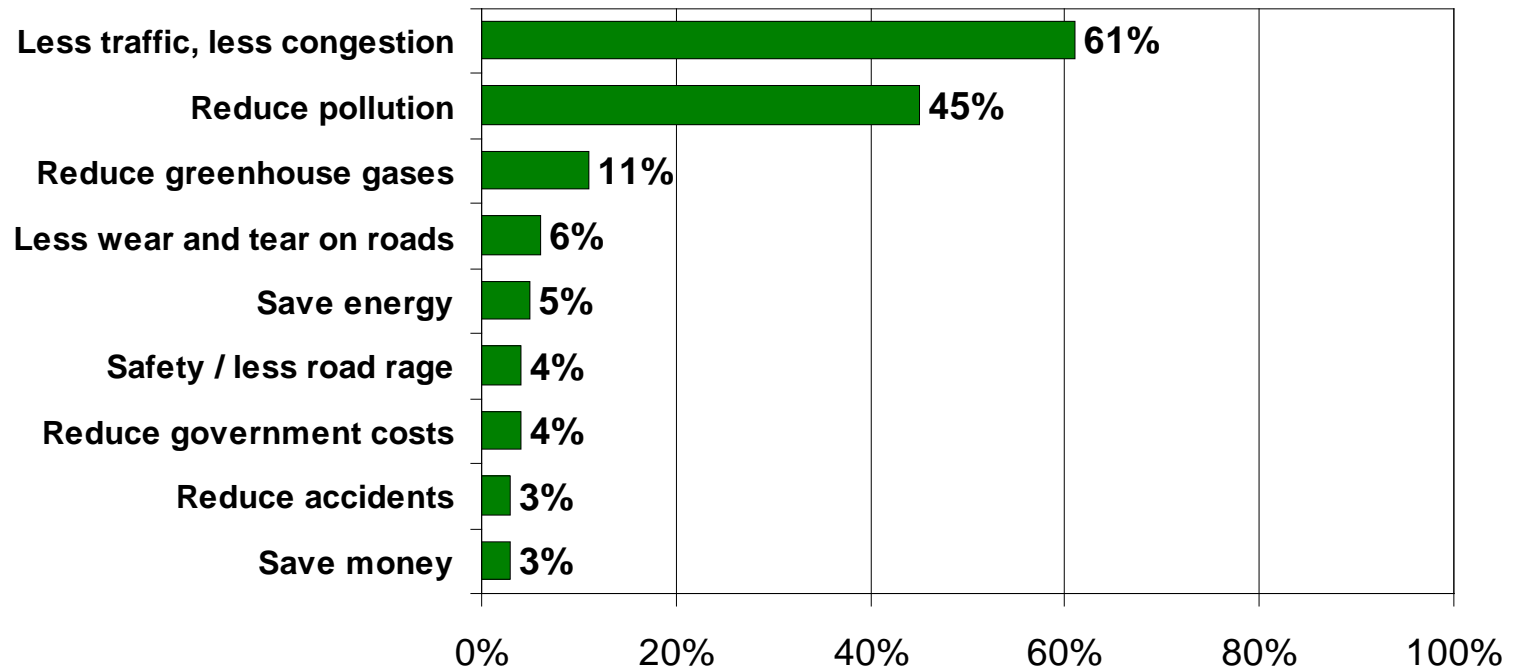
More than half of residents say people who rideshare receive a cost saving benefit and 26% note the benefit of helping the environment.



Q56f What personal benefits do you think people who rideshare receive from using these types of transportation?

Residents also Cite Societal Benefits from Ridesharing

More than six in ten (61%) respondents said that use of alternative modes could reduce traffic or congestion and 56% said it could reduce pollution or reduce greenhouse gases.



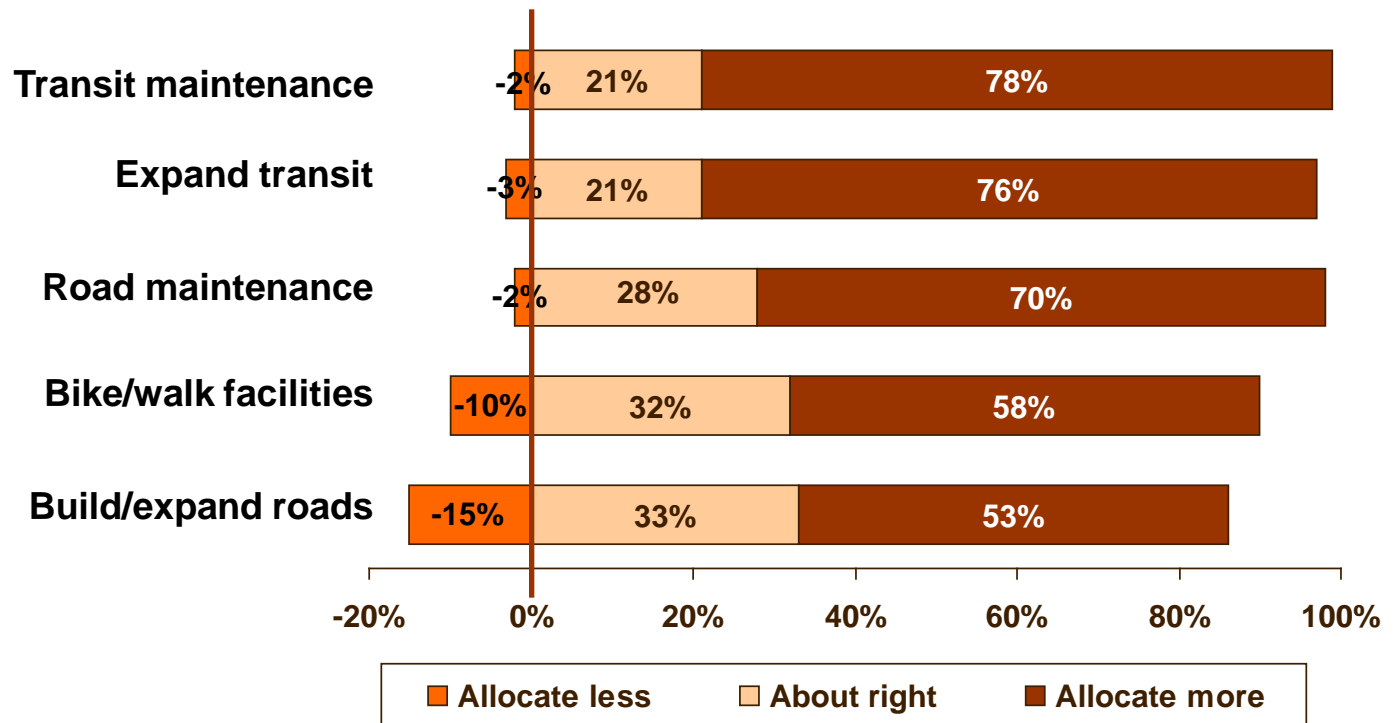
Q56g What impact or benefit does a community or region receive when people use these types of transportation?



Regional Transportation Investment

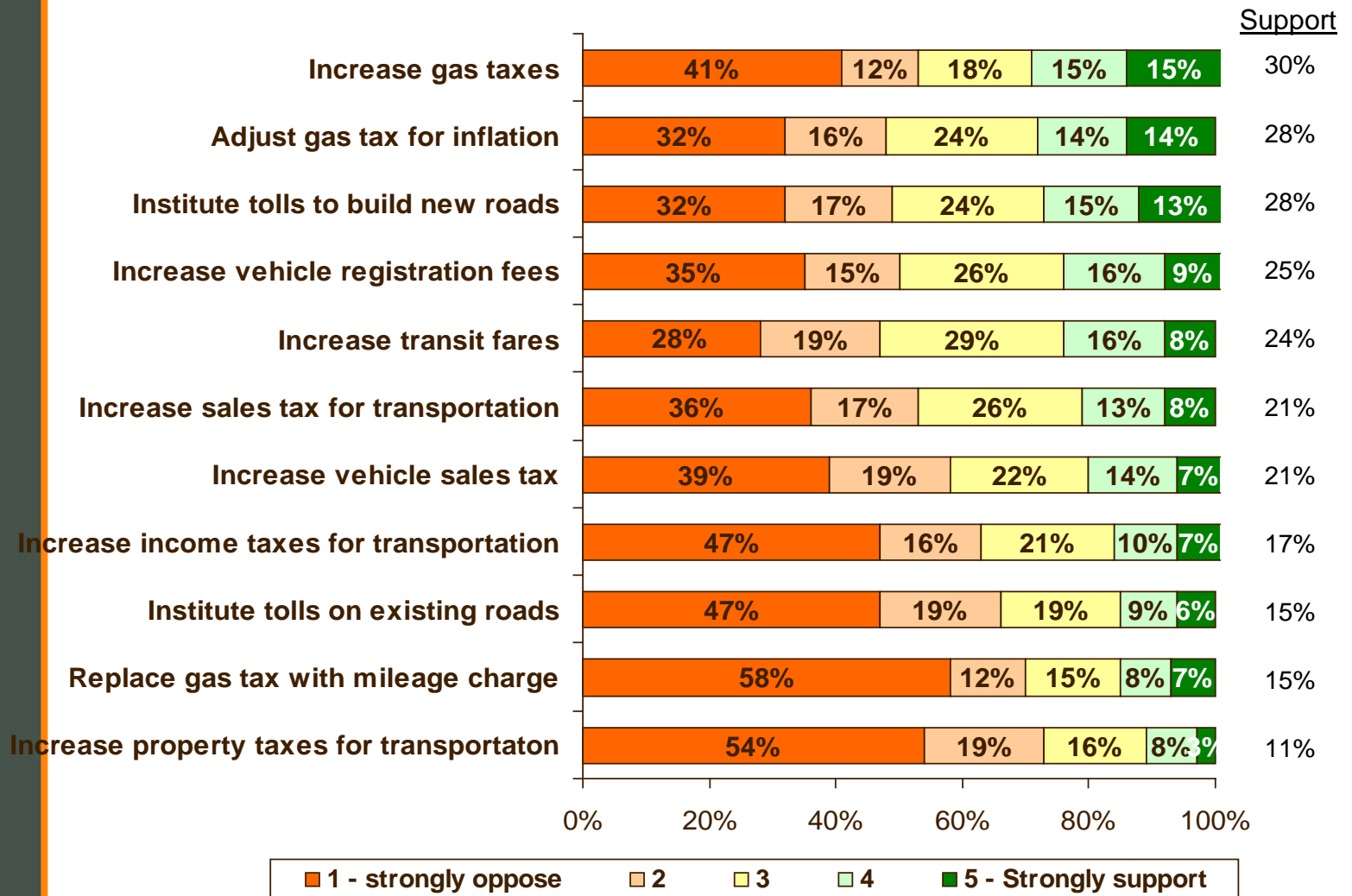
Investment in Transportation

– Respondents overwhelmingly supported more funding for transit maintenance (78%) and expanding transit coverage (76%). A similar share of respondents felt the region needed to spend more money on road maintenance. More than half felt the region should allocate more funding to bike/walk facilities.



109 I'm going to read you several possible ways the Washington region could spend its current transportation dollars. ...should the region allocate more, less, or about the same amount of money on this item as it does now?

Transportation Funding Sources



Q110 Finally, I'll read several possible ways to increase transportation funding for the region. Please rate your support for each