



2004 State of the Commute Survey Telework Presentation

COG Board of Directors

October 13, 2004

Senior Executive's Forum Oct 12th



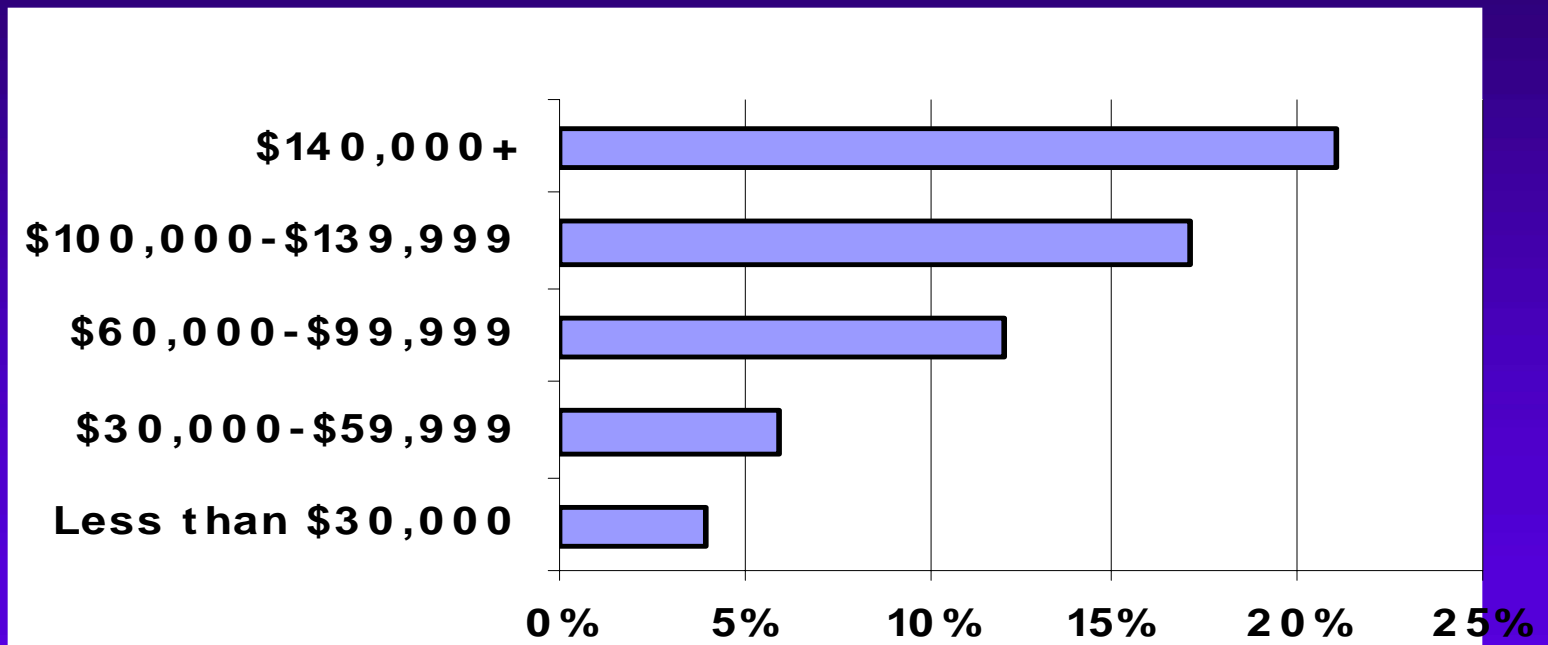
Snapshot of Teleworking in Washington Region 2001 - 2004

- In 2001, 11.3% of the Workforce Teleworked on Average 1.1 days per Week
 - 290,000 Teleworkers
- In 2004, 12.8% of the Workforce Teleworked an Average of 1.3 days per Week
 - 320,000 Teleworkers

Federal vs. Non-Federal Teleworkers

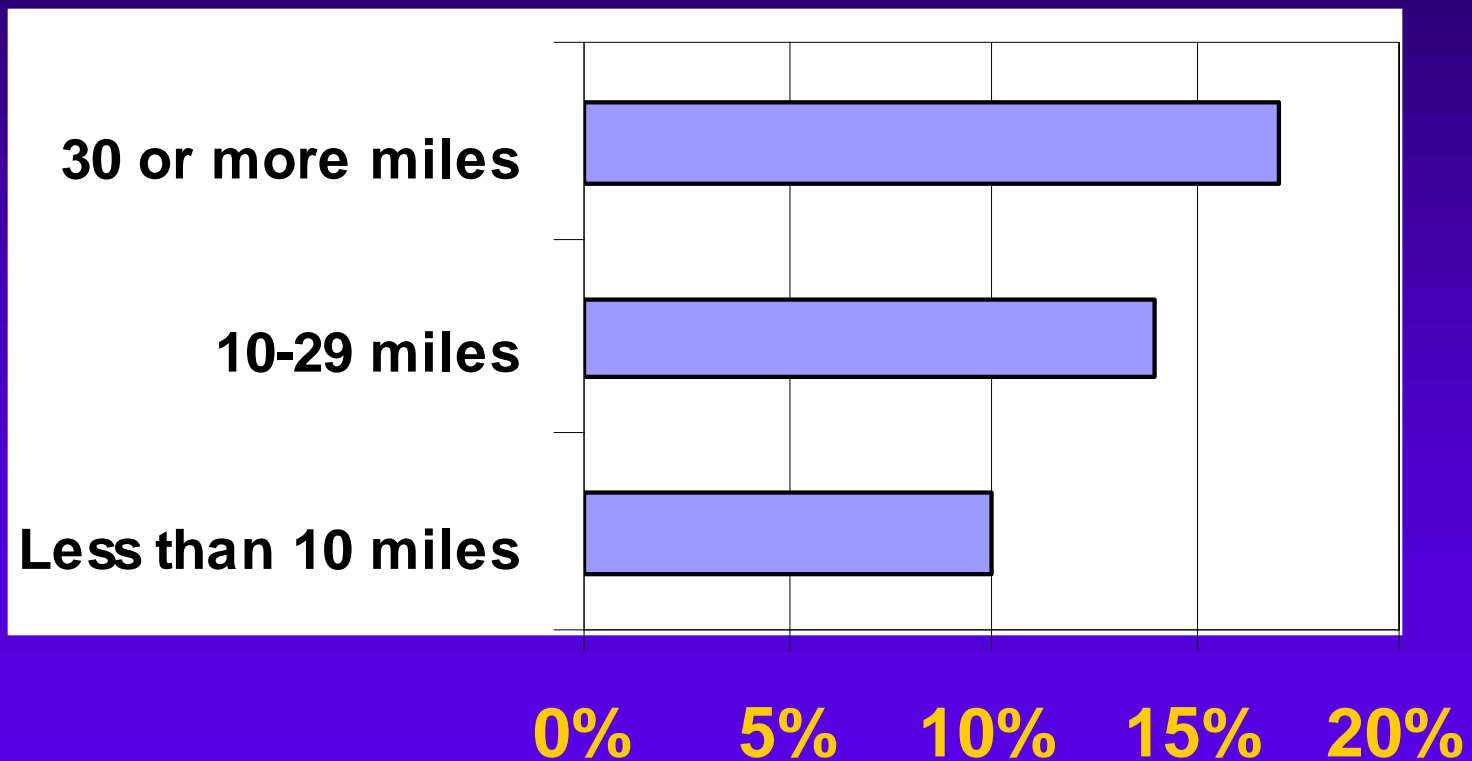
- Gains Seen for Both Federal and Non-Federal Workers from 2001 to 2004
 - Federal increased from 6.9% to 11.8%
 - Non-Federal increased from 12.6% to 13.4%

Telework Levels By Income - 2004



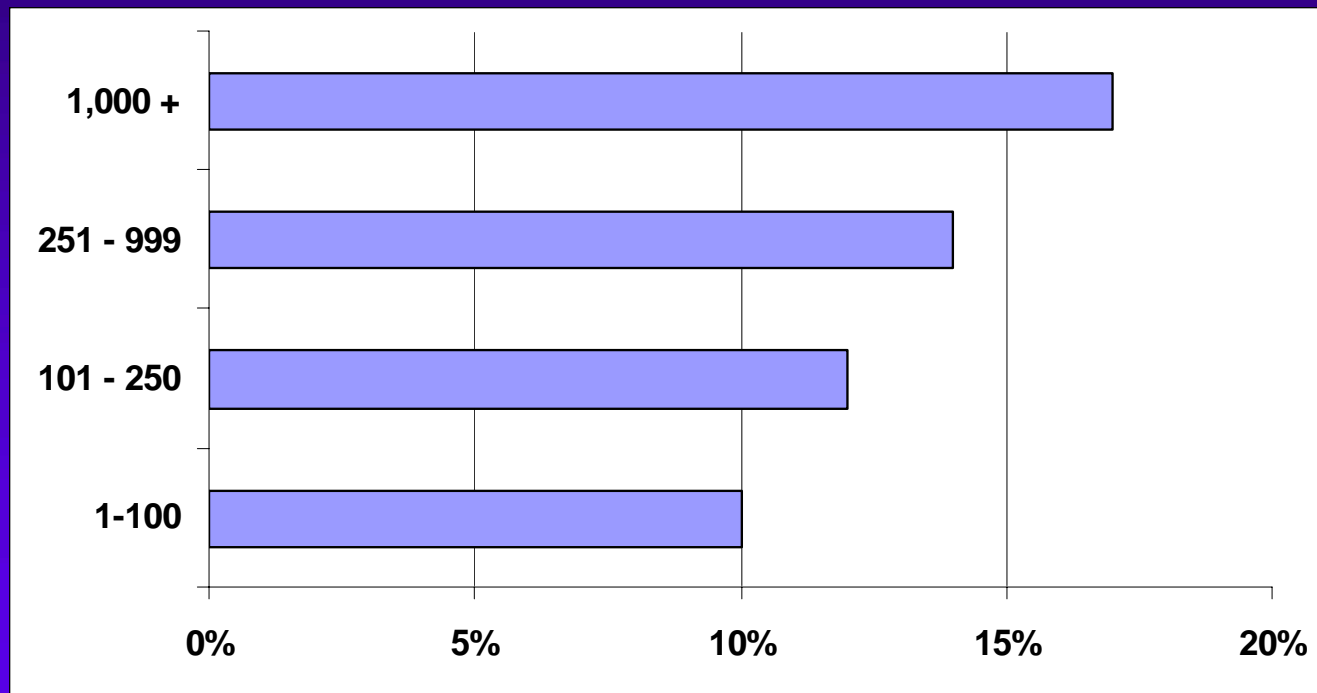
Telework Levels

By Distance Traveled - 2004



Telework Levels by Employer Size – 2004

Number of Employees



Telework Impact on Congestion & Air Quality

Based on 320,000 Teleworkers in 2004:

- **Vehicle Miles Reduced: 2,000,000 per day**
 - *Back and forth across the U.S. every day for a year*
- **Over 100,000 Gallons of Gas Saved per day**
 - *\$200,000 worth at today's prices !*
- **Nitrogen Oxides (NOx) Reduced: 1.5 Tons per day**
 - *Over half a percent of daily NOx from all vehicles on the region's roads*

Telework Potential in the Region

Of Non-Telecommuters in 2004:

- 25% Have Telework Appropriate Job Responsibilities
- 19% “Could and Would” Telework if Offered the Opportunity
 - 420,000 Potential new Teleworkers

Telework Potential in the Region

- **Current Telework Percentage –**
 - Public Sector lags behind Private / Non-Profits
- **Potential Telework Percentage -**
 - Federal shows the highest gap

	Teleworkers 2004	"Could & Would"	Total Potential
Employer Type	320,000	420,000	740,000
Private Sector / Non-Profit	15%	16%	31%
Federal	12%	21%	33%
State / Local	6%	14%	20%
Totals	13%	17%	30%

Closing the Gap on Telework

- 20% Goal Represents 2/3 of the Total Region Potential of 30%
- 180,000 More Teleworkers Needed to Reach 20% of Workforce
- Gap to Reach 20% Goal Represents 43% of Potential “Would & Could”

Business Continuity – Risks and Rewards

- Post 9-11 Environment Warrants Business Continuity Preparedness
- Another Regional Crisis, not if.....but when
- Anthrax, Airplanes, Blizzards, Hurricanes
- Offices Damaged / Shut Down, Impassable Roads, Out of Service Transit Systems

Business Continuity – Risks and Rewards

- Work Stoppage is Money Lost
- Consequences Could be Devastating for Ill-Prepared Businesses
- Resiliency – Companies Which Bounce Back Quickly will Gain Market Share

Business Continuity - How can Telework Help

- Teleworkers can Continue Work Operations When Access to Offices is Disrupted
- The More Teleworkers in Place, the Easier it is to Ensure Business Continuity During Emergencies
- Ensuring Business Continuity Through Telework can Provide a Competitive Advantage in the Marketplace

In Summary – Where We Are

- **Teleworking is Increasing Steadily**
 - *320,000 teleworkers in 2004, 12.8% of the workforce*
- **Teleworking is Significantly Reducing Daily Vehicle Miles, Gasoline Consumption and Emissions**
- **Teleworking is Improving Quality of Life for Employees and Productivity for Businesses**

In Summary – Where We Need To Be

- To Reach the 20% Regional Goal, we Need an Additional 180,000 Teleworkers
 - *43% of the 420,000 workers who say they “could and would” telework*
- Expanded Teleworking can Provide Benefits for More Employees, Employers and the Region as a Whole
- Expanded Teleworking can Help to Ensure Business Continuity During Emergencies