

Commuter Connections TERM Evaluation Project 2013 State of the Commute Survey

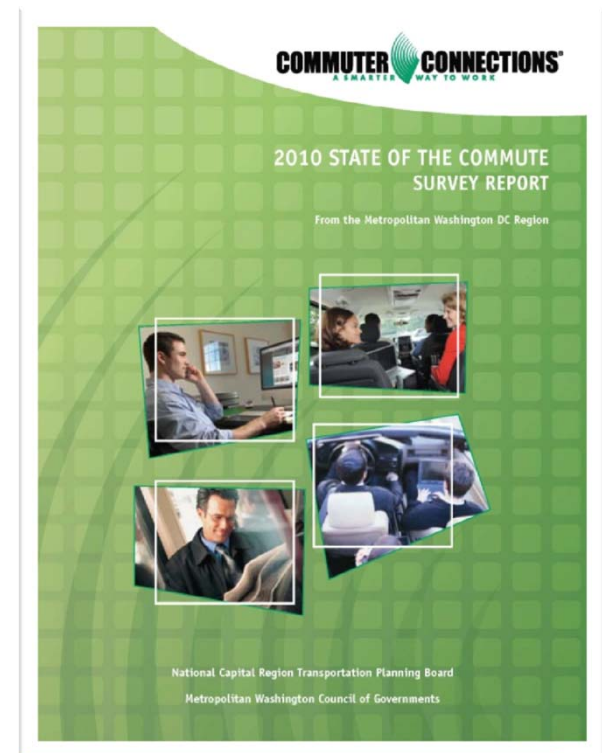
Highlight Results

July 16, 2013

LDA Consulting

with

ESTC, CIC Research, CUTR





Methodology



Survey Methodology

- Fifth triennial survey (2001, 2004, 2007, 2010, 2013)
- Telephone survey of 6,335 randomly-selected employed residents of COG region (95% \pm 1.2%)
- 575 in each of 11 jurisdictions (95% \pm 4.1%)
 - Included 1,034 cell phone interviews to ensure “cell phone only” households were surveyed
 - County level results were expanded to the regional population of workers
 - Data also were weighted to adjust sample for ethnicity and cell phone / landline availability



SOC Survey Topics



Continued tracking questions

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

New questions in 2013

- Roads used along commuting route
- Work activities performed during commute
- Interest in dynamic rideshare services

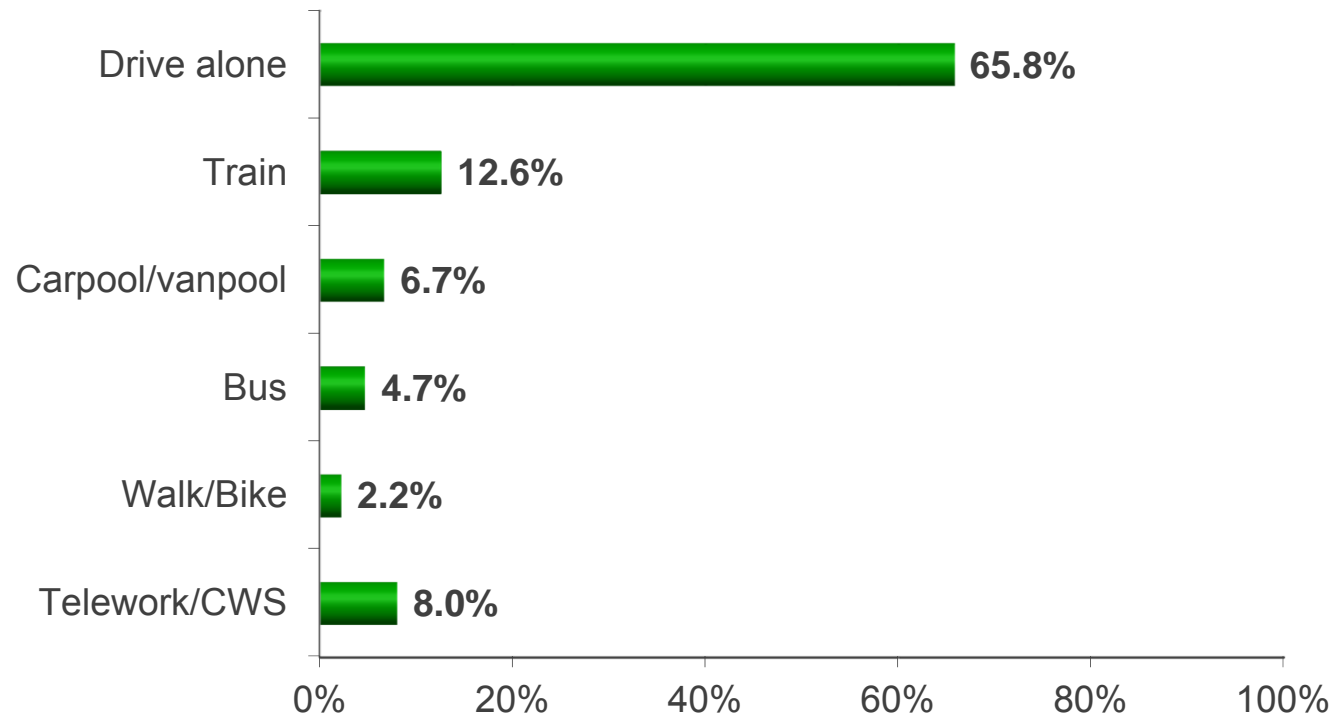


Commute Patterns



66% of Commuters' Weekly Commute Trips are Made by Driving Alone

17% of weekly commute trips are made by transit; Telework and compressed schedules eliminate 8% of weekly trips



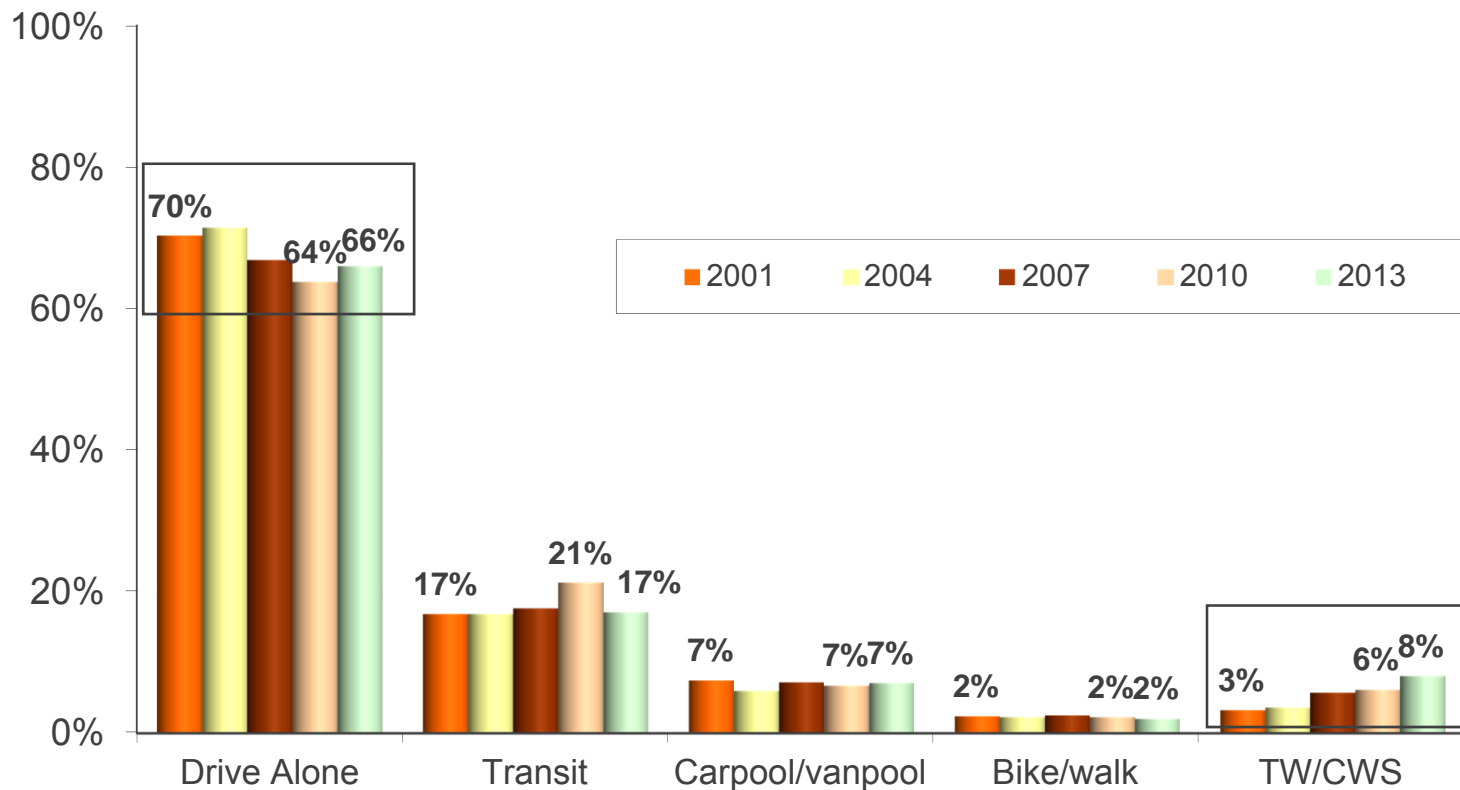
2013 SOC
n = 5,892

Excludes employees who are self-employed, with only work location at home

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

Drive Alone Percentage Dropped from 2001 to 2010 – Then slight Increase in 2013 from 64% to 66%

Telework has gained mode share since 2001; other modes remained essentially unchanged



2001 SOC
n = 6,924

2004 SOC
n = 6,851

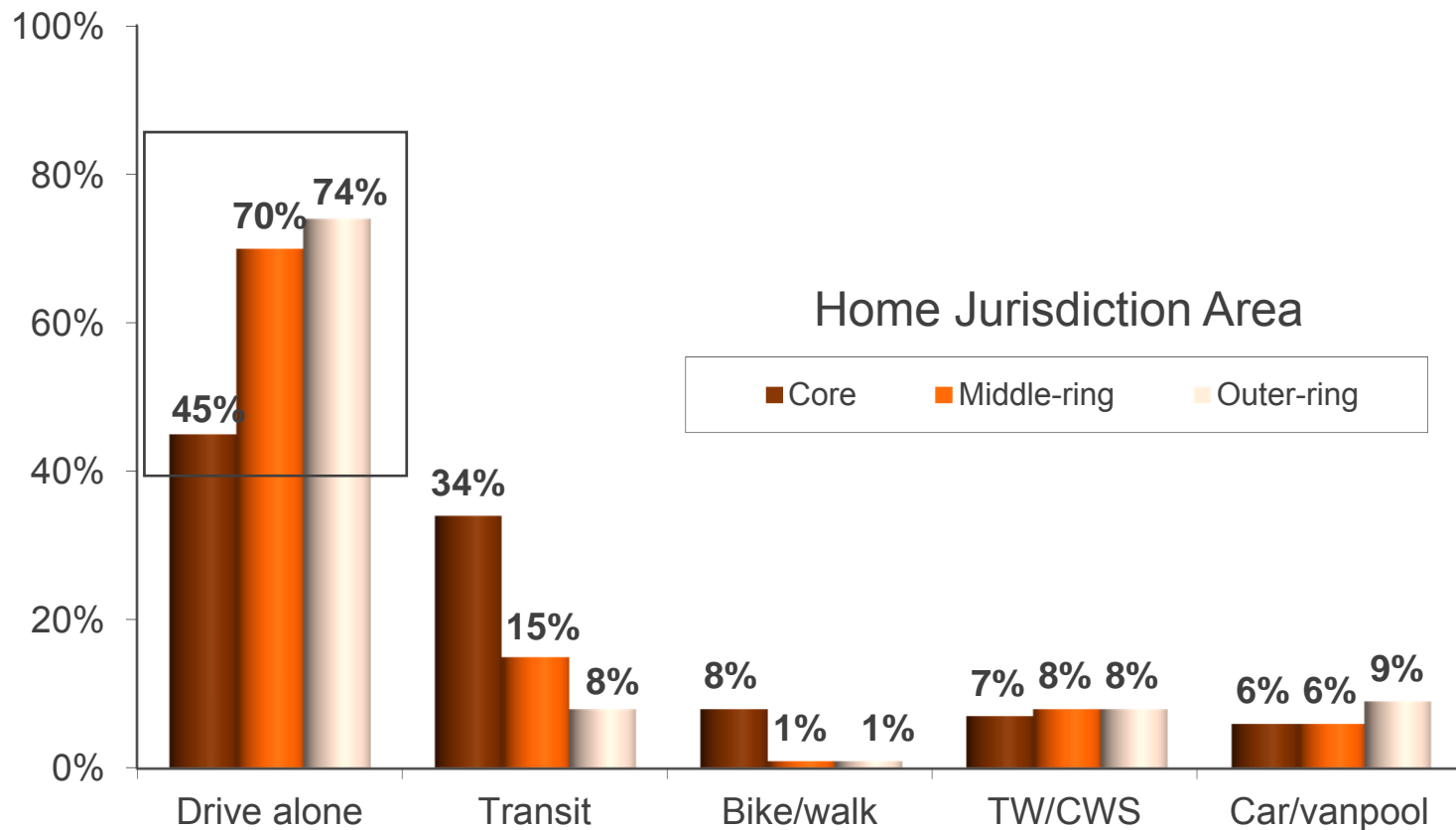
2007 SOC
n = 6,168

2010 SOC
n = 6,050

2013 SOC
N = 5,892

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

Fewer than Half of “Inner Core” Area Commuters Drive Alone, compared with 70% of Commuters in the “Middle Ring” and 74% of Commuters in the “Outer Ring” Area



Home Location

Inner Core
(Alexandria,
Arlington, DC)
n = 1,592

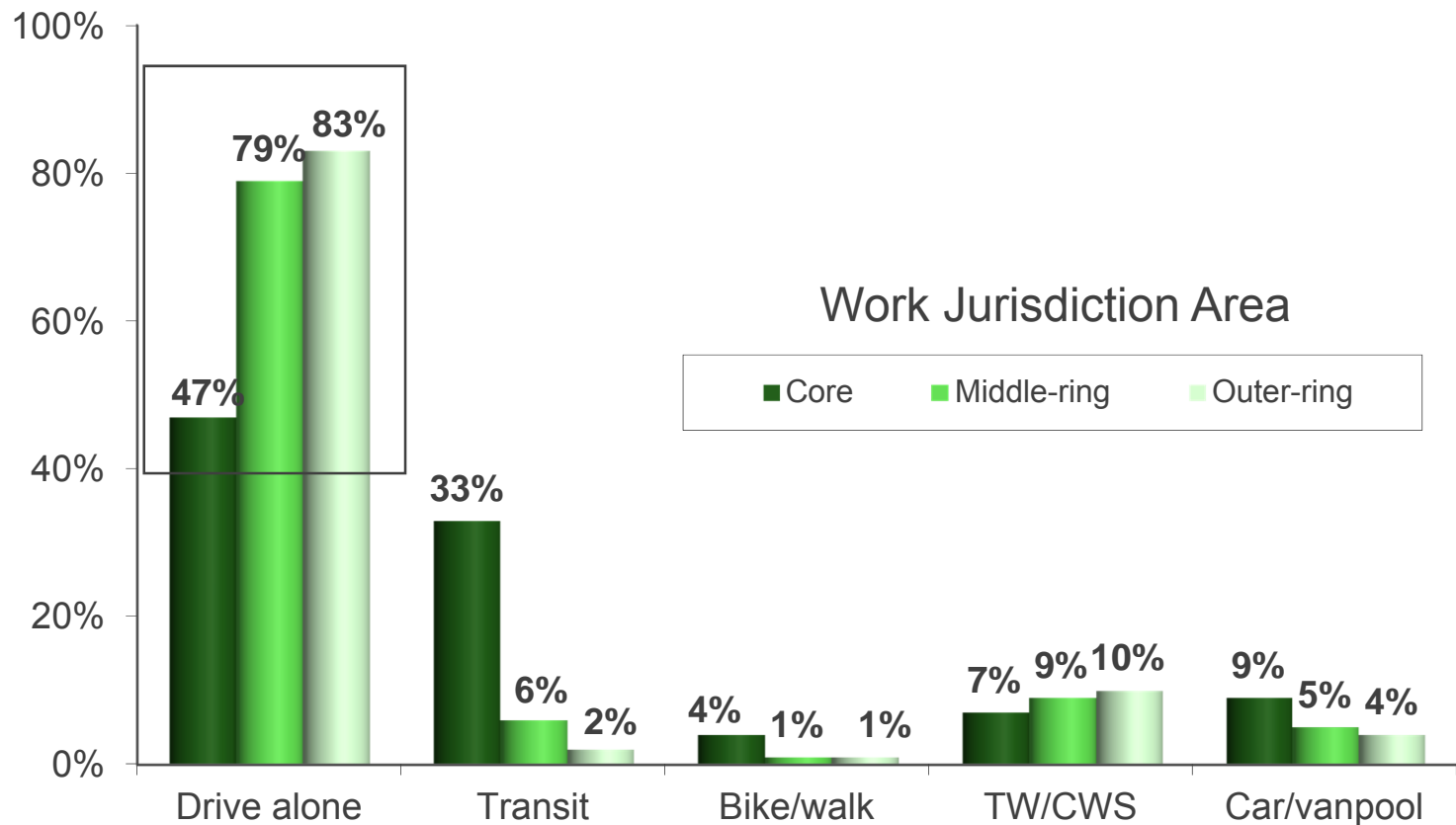
Middle Ring
(Fairfax,
Montgomery,
Prince George's)
n = 1,617

Outer Ring
(Calvert, Charles,
Frederick,
Loudoun, Prince
William)
n = 2,699

Q15. Now thinking about LAST week, how did you get to work each day. .
Q2 Home jurisdiction area..

Commuters who Work in the Core Area Use Transit at a Much Higher Rate than do Commuters who Work in the Middle-Ring or Outer Ring

Core workers also bike/walk and carpool/vanpool at a higher rate



Work Location

Inner Core
(Alexandria,
Arlington, DC)
n = 2,485

Middle Ring
(Fairfax,
Montgomery,
Prince George's)
n = 1,931

Outer Ring
(Calvert, Charles,
Frederick,
Loudoun, Prince
William)
n = 1,470

Q15. Now thinking about LAST week, how did you get to work each day. .
Q3 Work jurisdiction area..

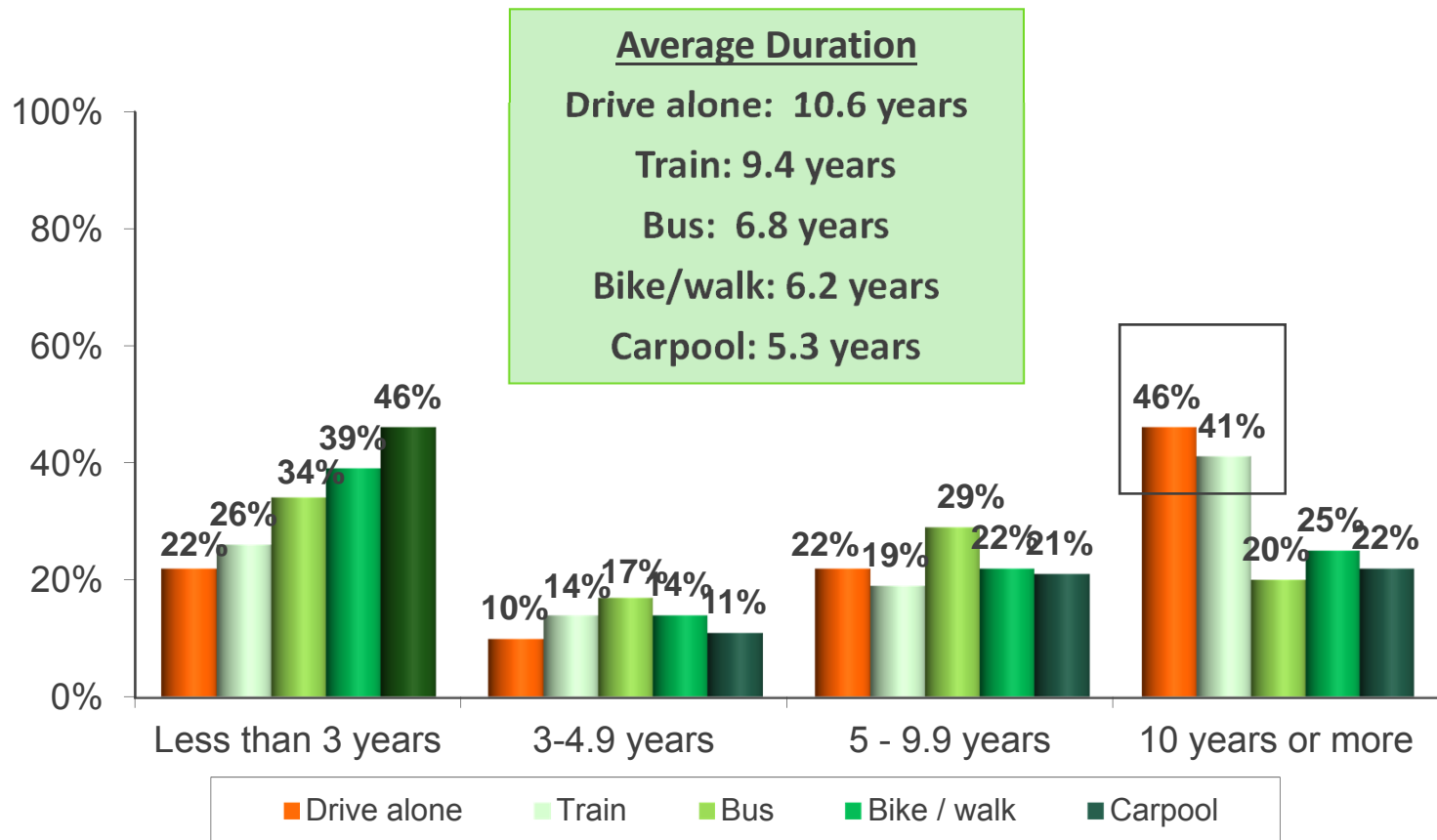
78% of Commuters Use the Same Commute Mode 4+ Days Per Week

Alt mode users 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	Secondary Use
Drive alone	67%	71%	4%
Metrorail/Commuter Rail	13%	15%	1%
Carpool/vanpool	7%	8%	1%
Bus	5%	5%	<1%
Bicycle / walk	2%	3%	1%
Telework	5%	15%	10%

Commuters who Drive Alone or Ride a Train have Used these Modes Longer than Other Commuters – About 9-10 Years on Average

More than half of commuters who ride a bus, bike/walk, or carpool to work have used these modes for less than 5 years



Drive alone
n = 3,123

Train
n = 665

Bus
n = 302

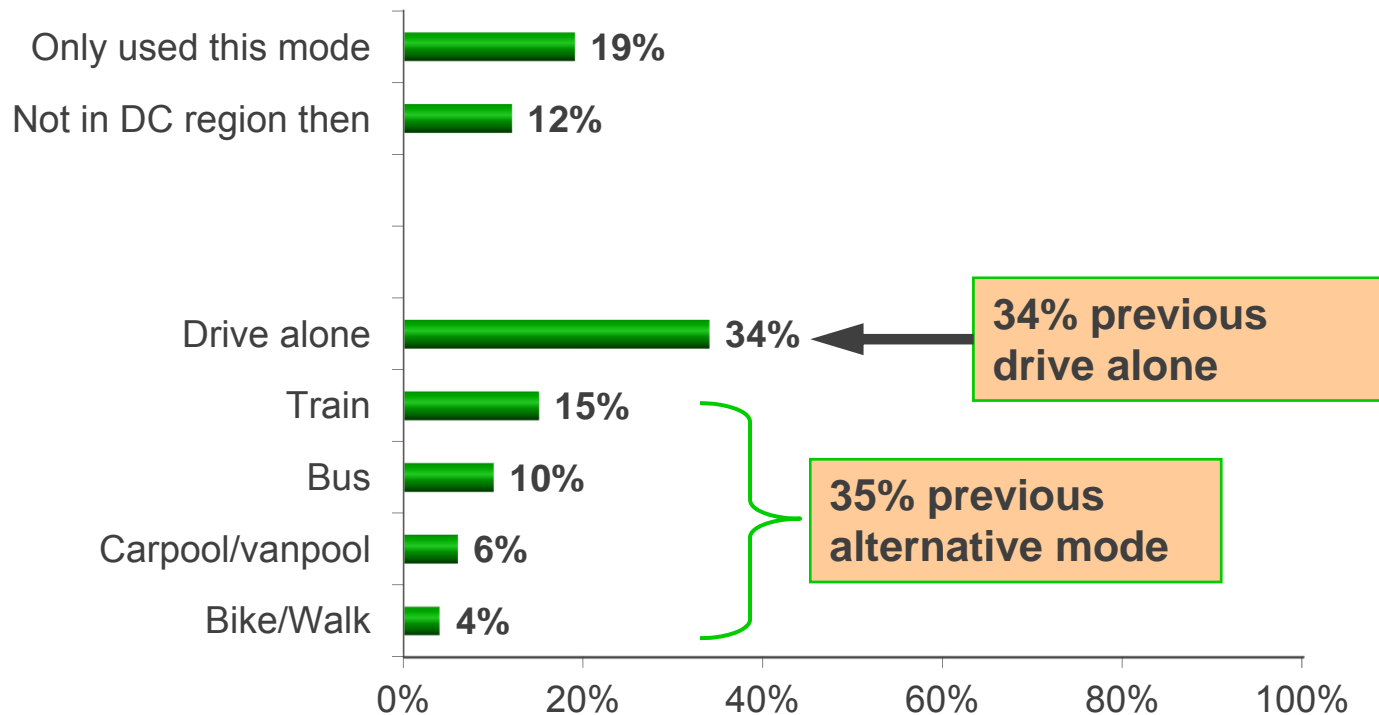
Carpool
n = 390

Bike/walk
n = 171

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

34% of Alternative Mode Users Previously Drove Alone, 35% Shifted from Another Alternative;

31% always/only used their current mode or didn't live or work in the Washington region before



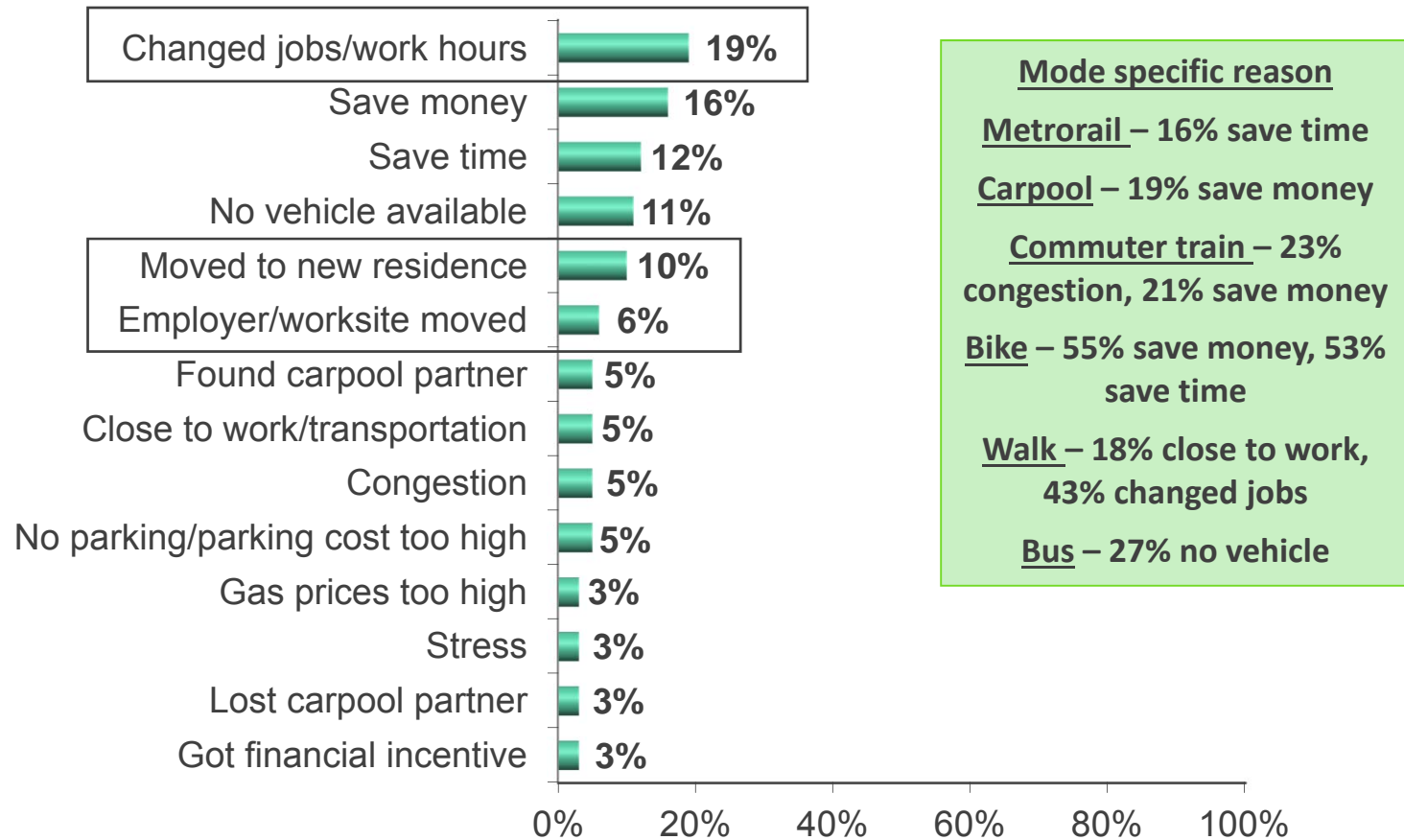
n = 686

Includes respondents who did not live in the metro region before starting their current alternative mode and those who "always used" their current mode

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

19% of Respondents Who Commute by an Alternative Mode Started Using the Modes because they Changed Jobs / Work Hours;

10% moved to a new residence and 6% said their worksite moved

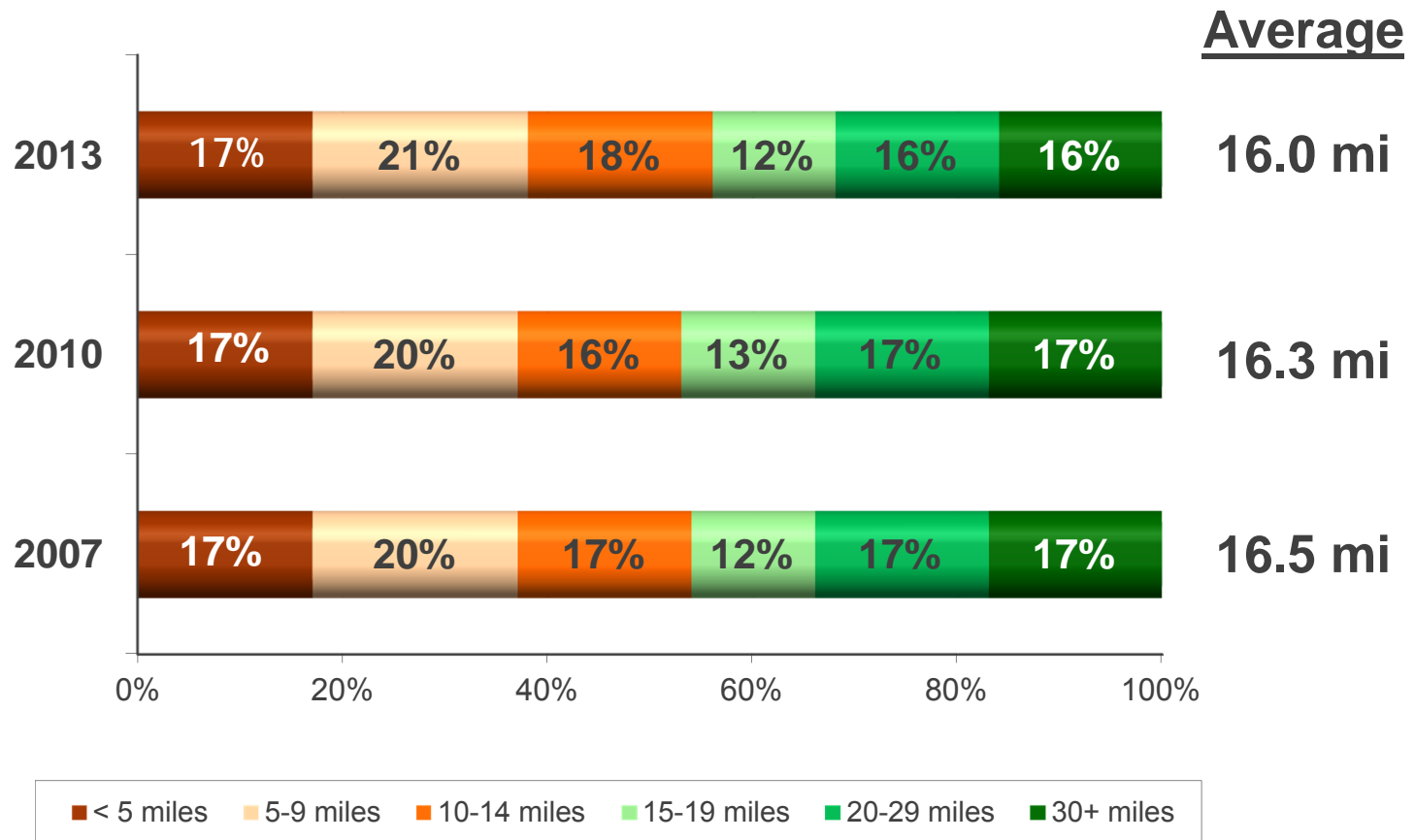


n = 576

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

The 2013 Average Commute Distance (16.0 mi) is Less than 2010 (16.3 mi) and than 2007 (16.3 mi)

More than a third of respondents traveled fewer than 10 miles, but 32% traveled 20 miles or more



2013 SOC
n = 5,122

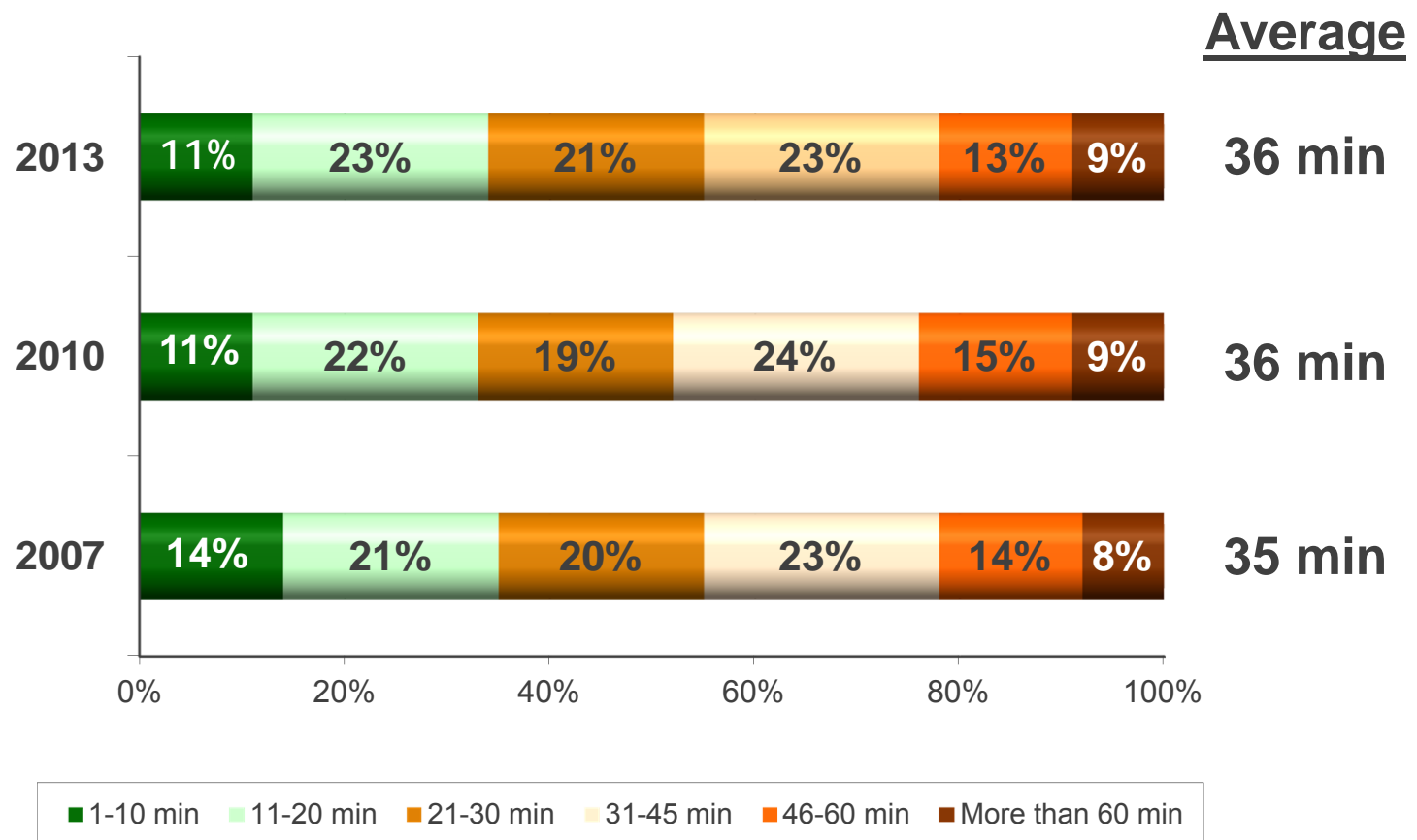
2010 SOC
n = 5,533

2007 SOC
n = 5,465

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

The Average Commute Time is the Same in 2013 as in 2010 was about the same (36 min) as in 2007

About a third of respondents traveled 20 minutes or less to work.
About one in ten traveled 60 minutes or more.



2013 SOC
n = 5,605

2010 SOC
n = 5,533

2007 SOC
n = 5,465

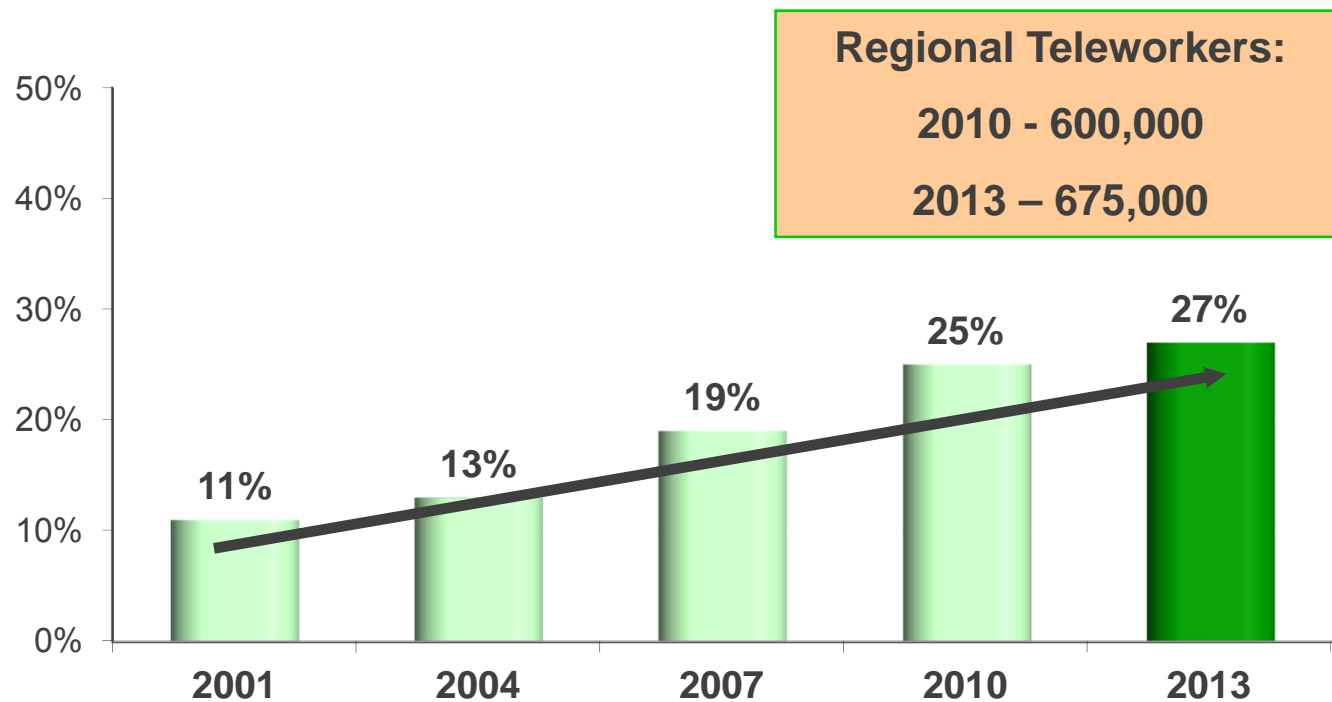
Q16 How long is your typical daily commute one way? How many minutes?



Telework Experience

Telework Growth Continued Between 2010 - 2013, although at a Less Dramatic Rate

The region added 75,000 new teleworkers for a 2013 total of 675,000



2001 SOC
n = 6,924

2004 SOC
n = 6,851

2007 SOC
n = 6,168

2010 SOC
n = 6,050

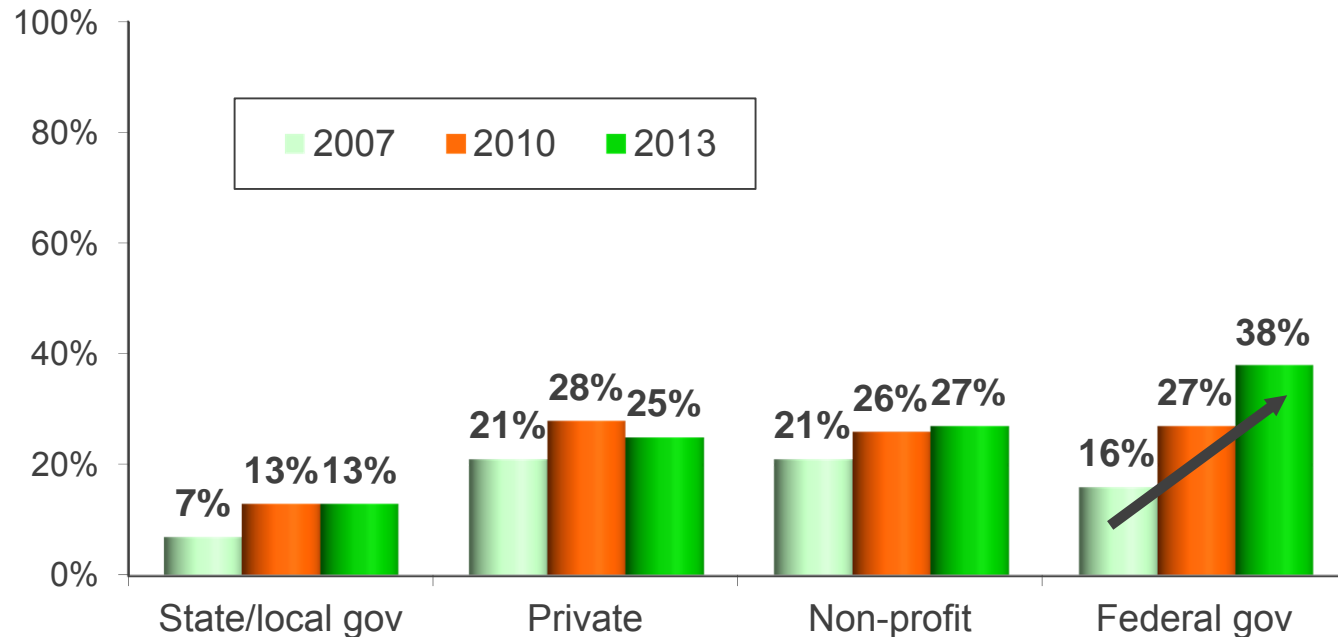
2013 SOC
n = 5,892

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?

Most of the Telework Growth in the Region has been Generated by Federal Agencies

Federal agencies increased their telework from 16% of federal workers in 2007 to 38% in 2013



2007 SOC
 State/local n = 756
 Private n = 3,027
 Non-profit n = 635
 Federal n = 1,337

2010 SOC
 State/local n = 858
 Private n = 2,599
 Non-profit n = 771
 Federal n = 1,602

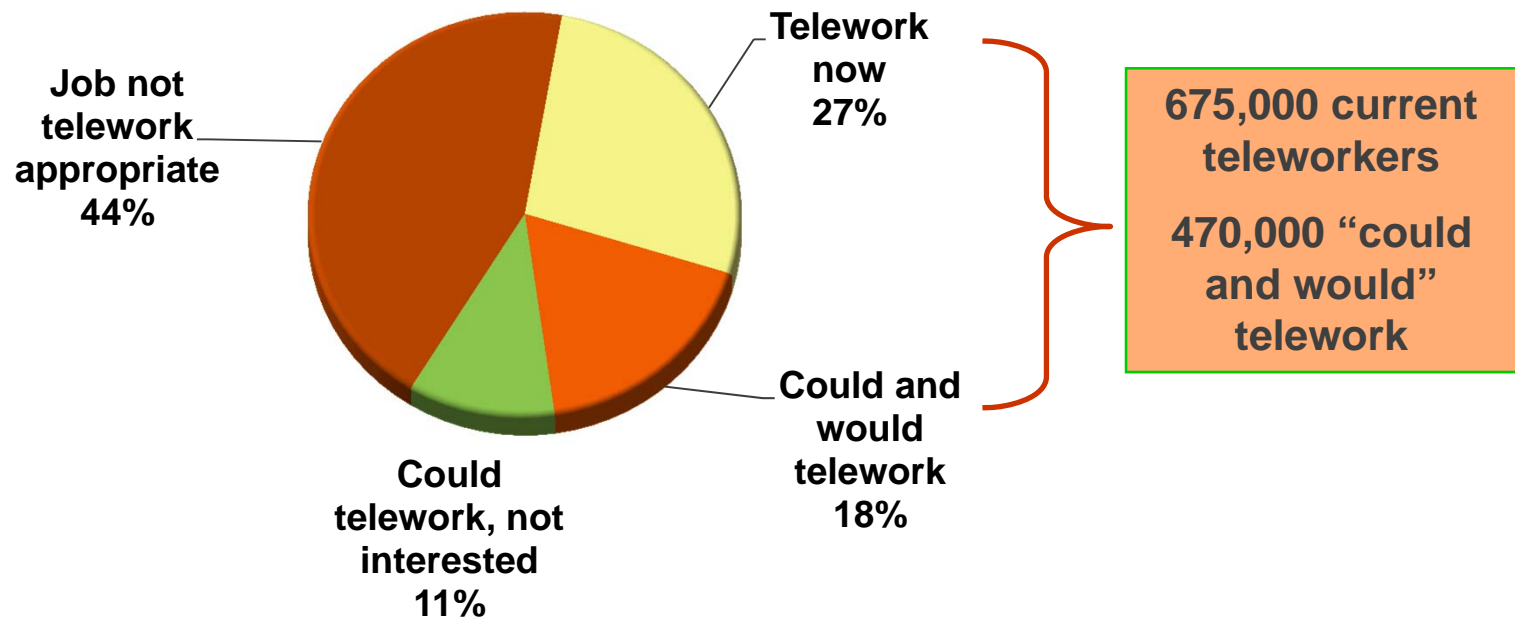
2013 SOC
 State/local n = 764
 Private n = 2,519
 Non-profit n = 625
 Federal n = 1,417

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?

470,000 Non-telework Commuters have Job Responsibilities that Could be Performed through Telework and Would Like to Telework

Six in ten interested workers would like to telework “regularly” and four in ten would like to telework “occasionally”



2013
n = 5,892

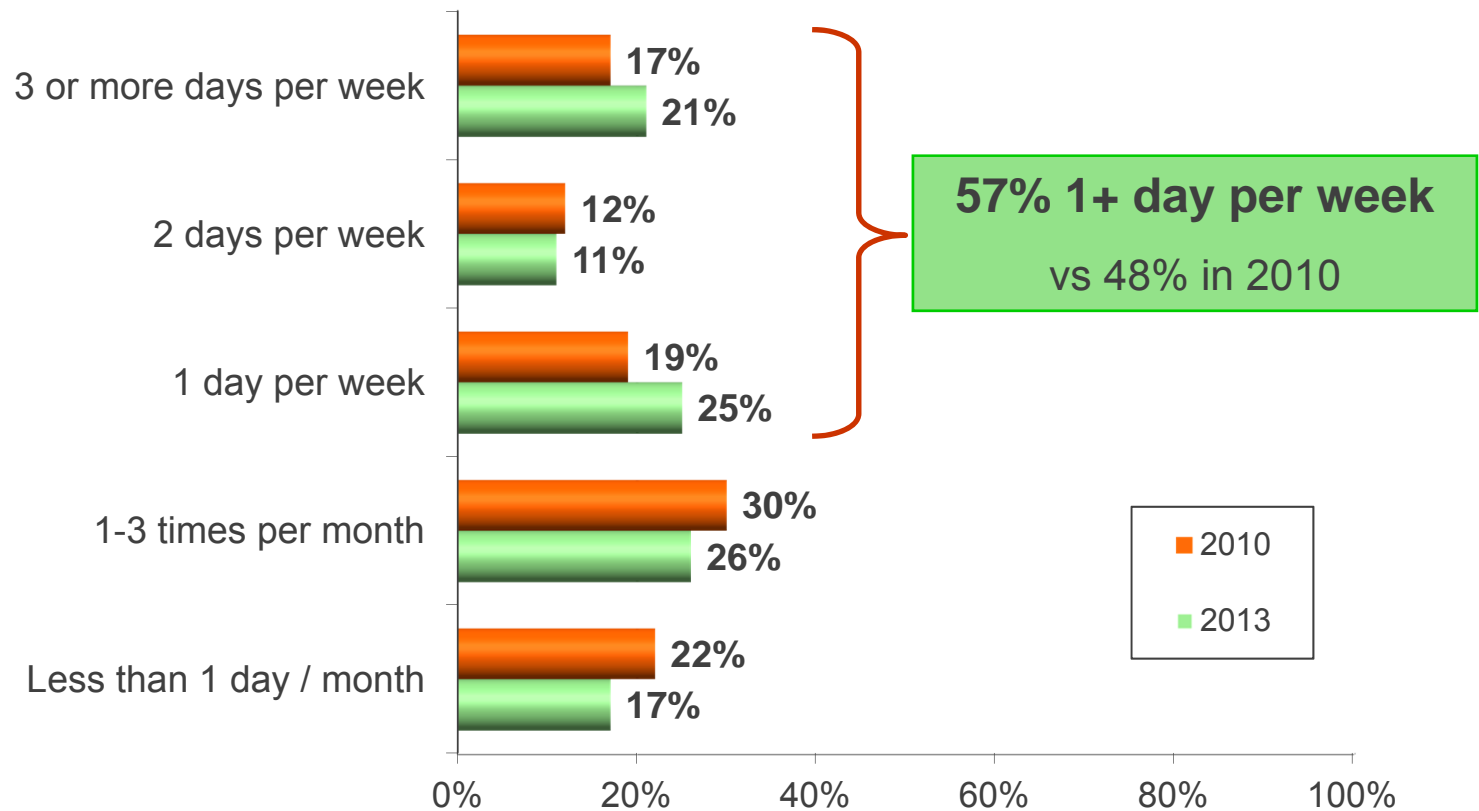
Excludes workers who are self-employed and work only at home

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?

57% of Teleworkers Telework at Least One Day per Week and 21% Telework 3+ Days per Week

The average telework frequency is 1.4 days per week, an increase over the 2010 frequency of 1.3 days per week

Full-time Telework
3%



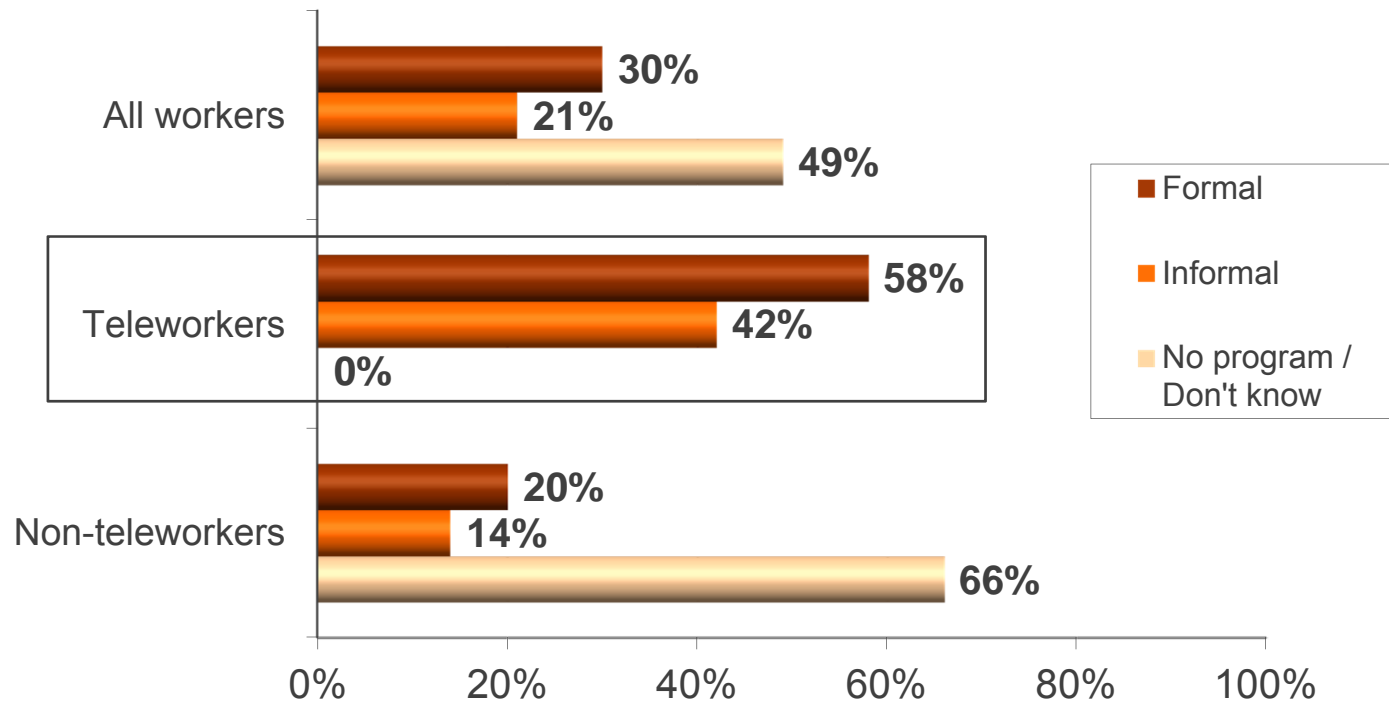
2013
n = 1,559

2010
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 nearly six in ten teleworkers telework under a formal program



All workers
n = 5,892

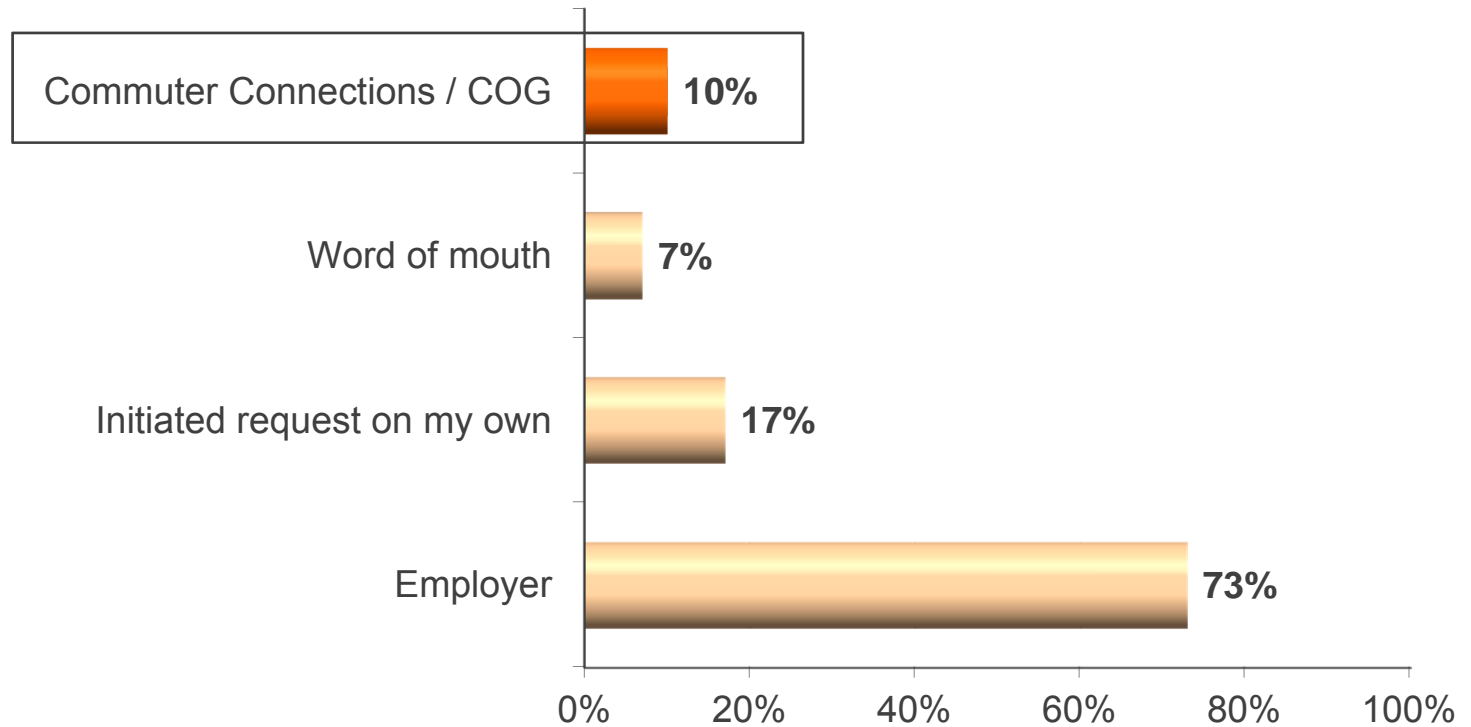
Teleworkers
n = 1,573

Non-teleworkers
n = 4,319

- 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?
- Q14d Does your employer have a formal telecommuting program at your workplace or permit employees to telecommute under an informal arrangement with the supervisor?

One in Ten Teleworkers Received Telework Information from Commuter Connections / COG

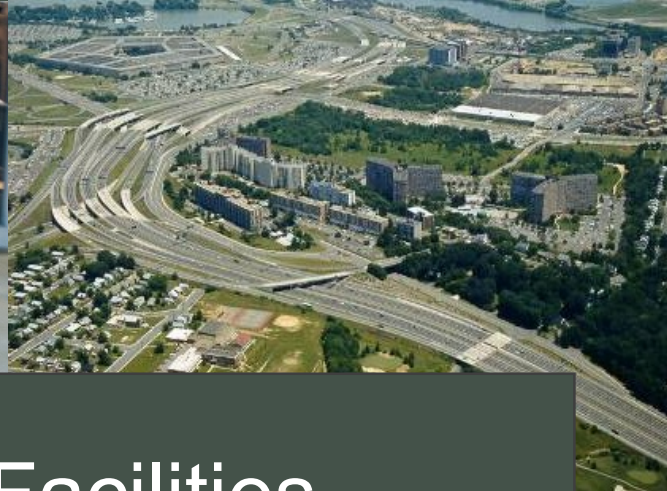
Most learned about telework from their employer



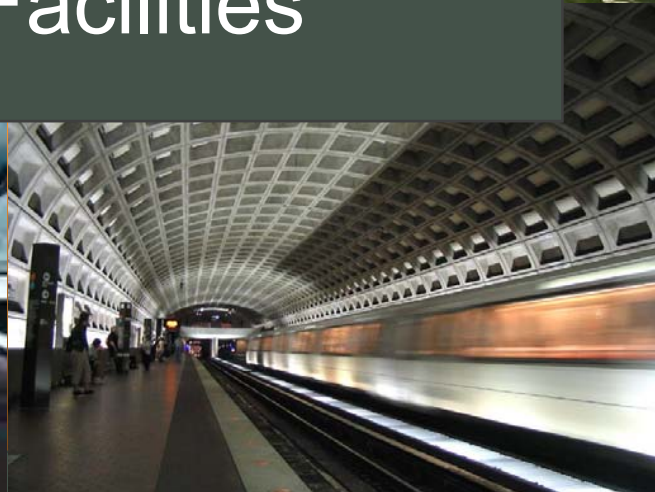
Teleworkers
n = 1,571

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?

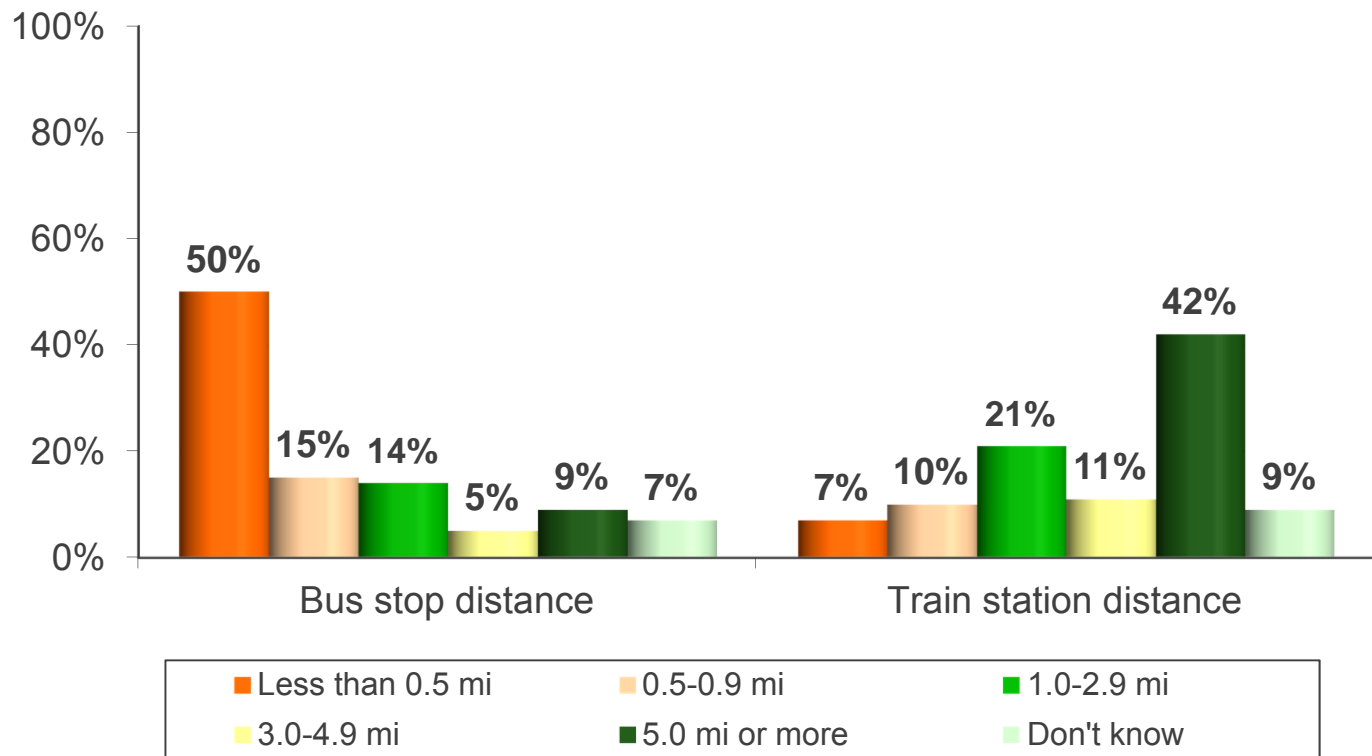


Travel Facilities



50% of Respondents Live Less than ½ Mile from a Bus Stop and 65% Live Less than 1 Mile

Train station access is less convenient; only 17% live less than 1 mile from a train station



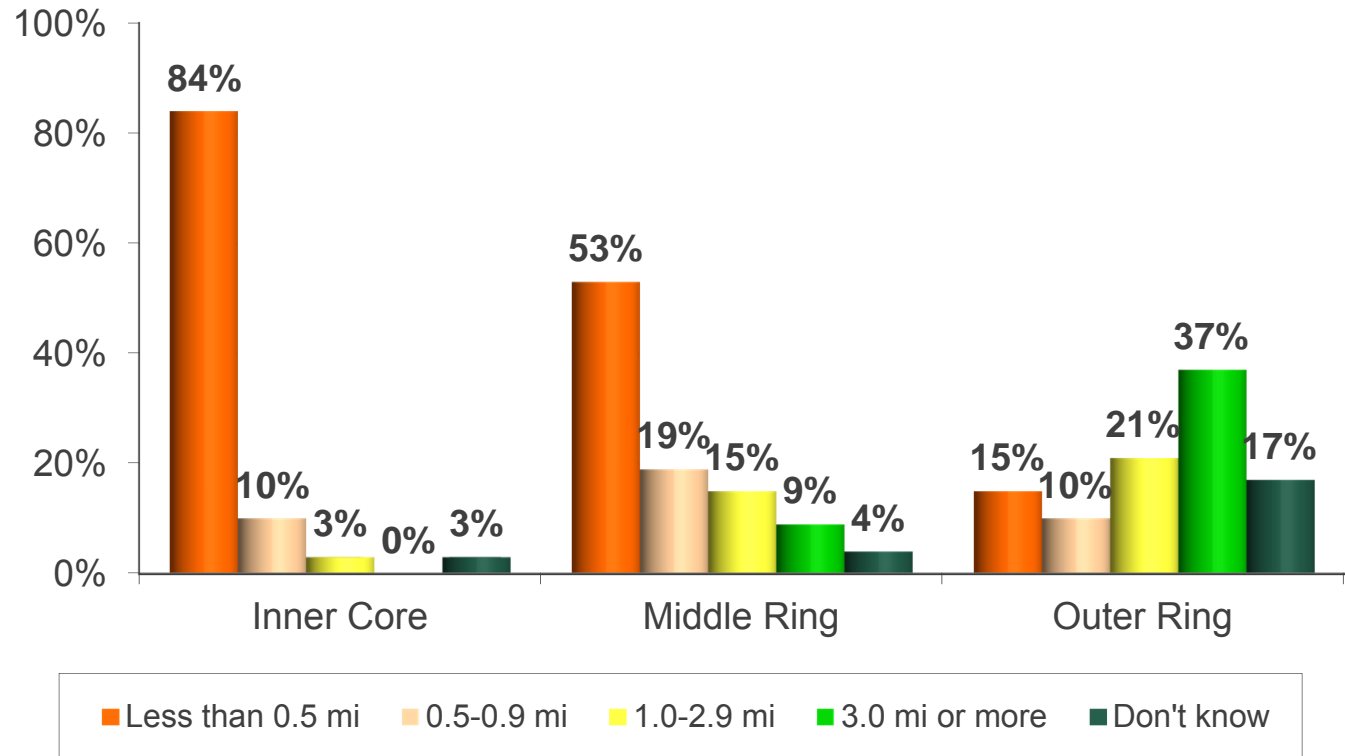
Bus distance
n = 5,718

Train distance
n = 5,718

Q44a About how far from your home is the nearest bus stop?
Q44b How far from your home is the nearest train station?

84% of “Core” Area Respondents Live Less than ½ Mile from a Bus Stop

In the “Middle Ring” area, 53% have a bus stop within ½ mile; only 15% of “Outer Ring” respondents have close bus access



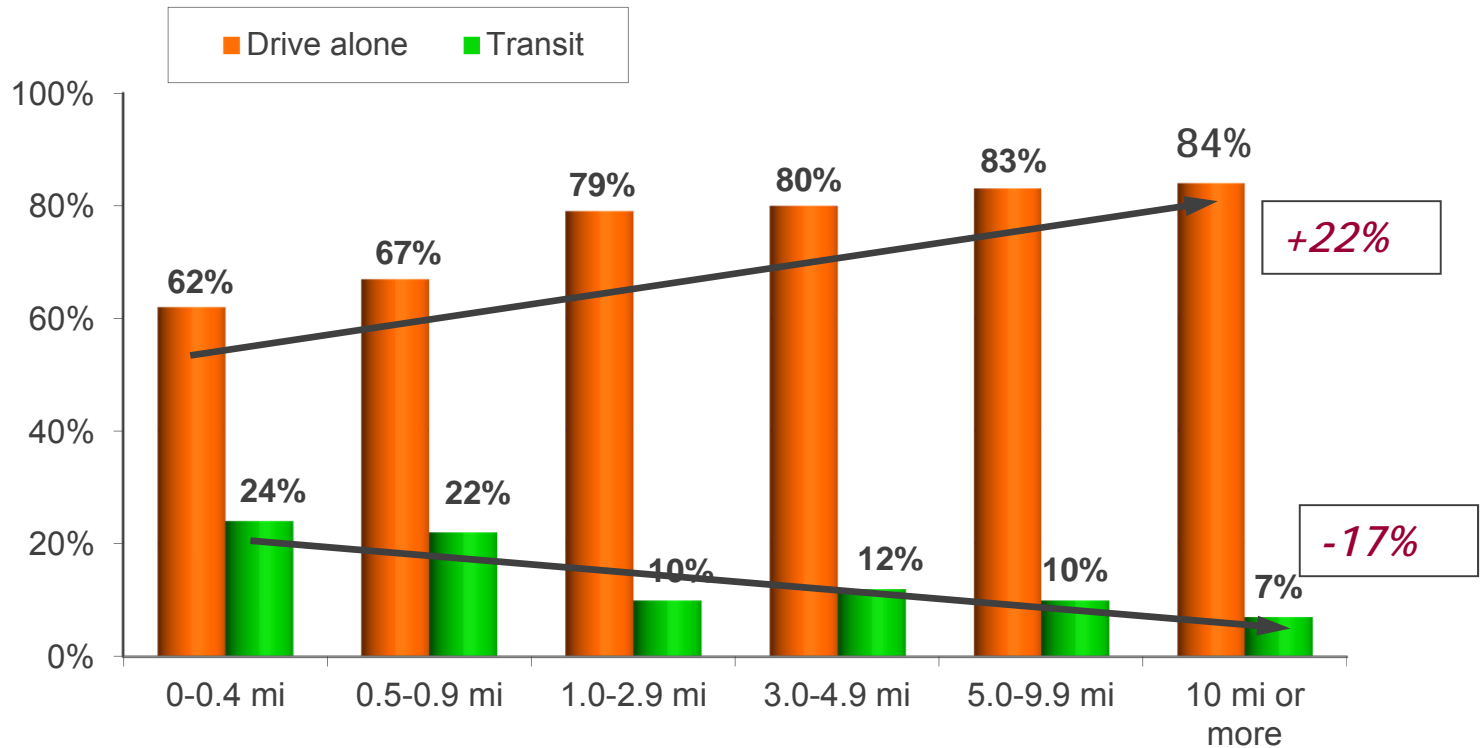
Inner Core
(Alexandria, Arlington, DC)
n = 1,551

Middle Ring
(Fairfax, Montgomery, Prince George's)
n = 1,560

Outer Ring
(Calvert, Charles, Frederick, Loudoun, Prince William)
n = 2,607

Q44a About how far from your home is the nearest bus stop?
Q44b How far from your home is the nearest train station?

The Drive Alone Rate Increases and Transit Use Decreases as the Distance from Home to Bus Stop Increases



0.0-0.4 mi
n = 2,492

0.5-0.9 mi
n = 657

1.0-2.9 mi
n = 749

3.0-4.9 mi
n = 337

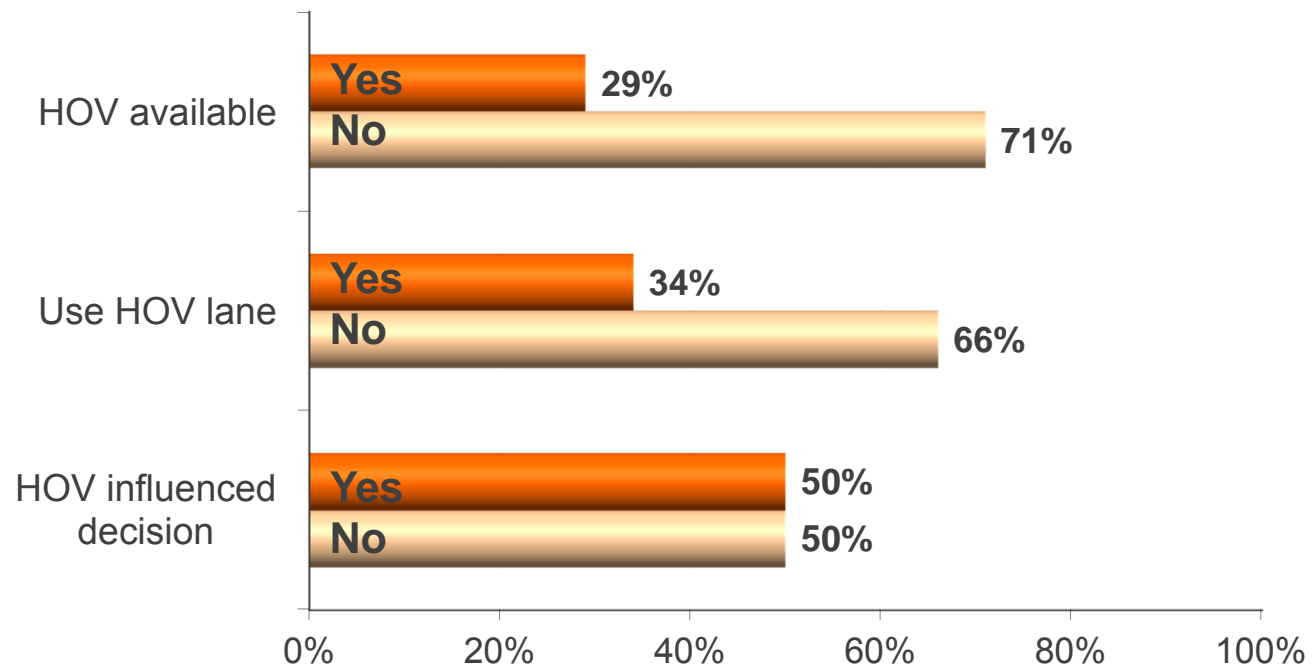
5.0-9.9 mi
n = 454

10.0 mi or more
n = 441

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 is an HOV / Express Lane Along their Route to Work

A third 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 = 5,718

Use HOV lane
n = 1,578

HOV lane influenced decision
n = 538

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?

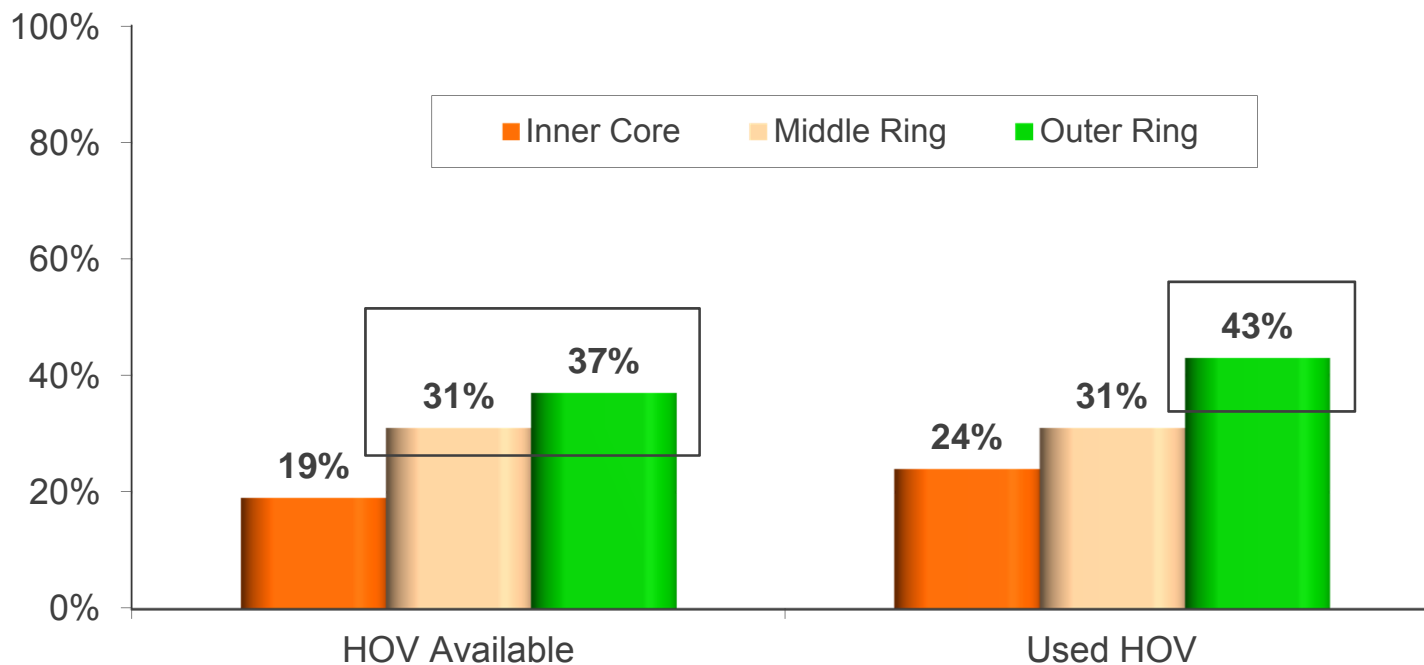
Middle Ring and Outer Ring Commuters are More Likely than are Core Area Commuters to have HOV / Express Lanes Available

“Outer Ring” commuters use HOV / Express lanes at a very high rate when they are available

**Average
Travel
Time
Saving**
**24
minutes**


HOV lane available
Core
n = 1,551
Middle Ring
n = 1,560
Outer Ring
n = 2,607

Use HOV lane
Core
n = 421
Middle Ring
n = 453
Outer Ring
n = 704





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?

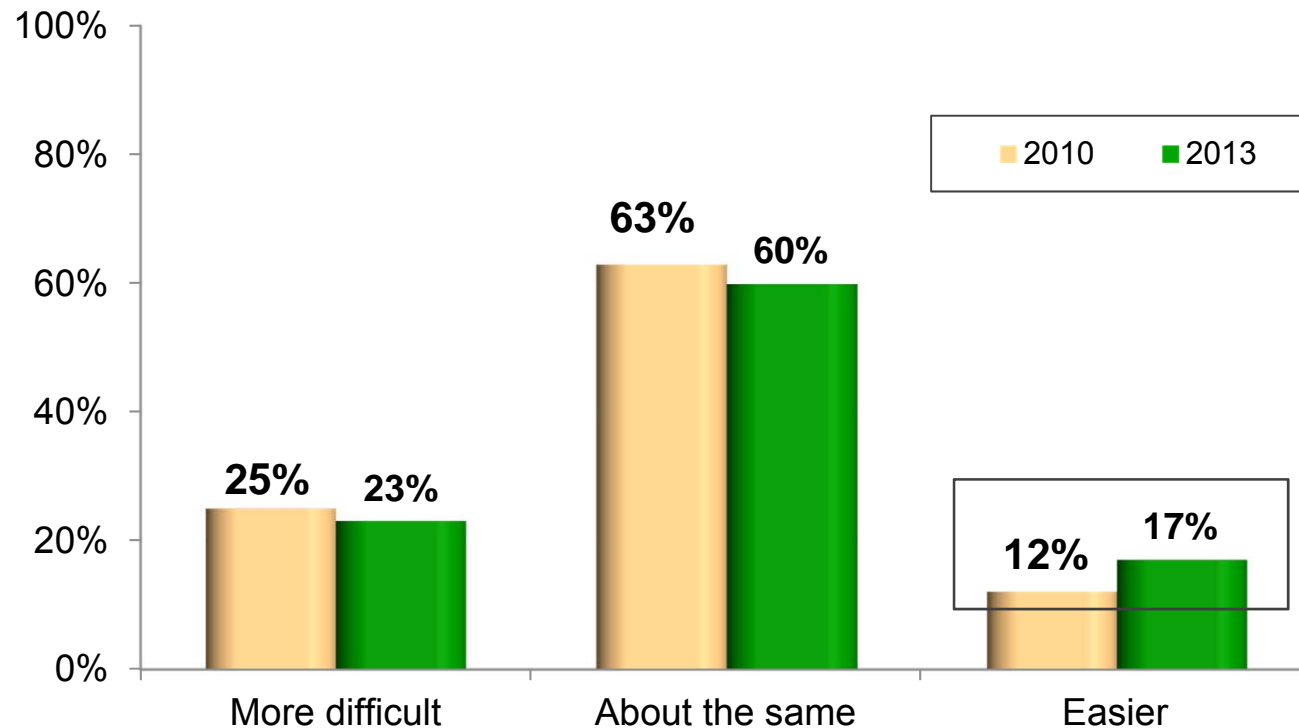
Q47 Do you ever use the HOV lane to get to or from work?



Commute Ease and Satisfaction



In 2013, 17% of Commuters Reported an Easier Commute than a Year Ago, Compared with 12% of Commuters in 2010



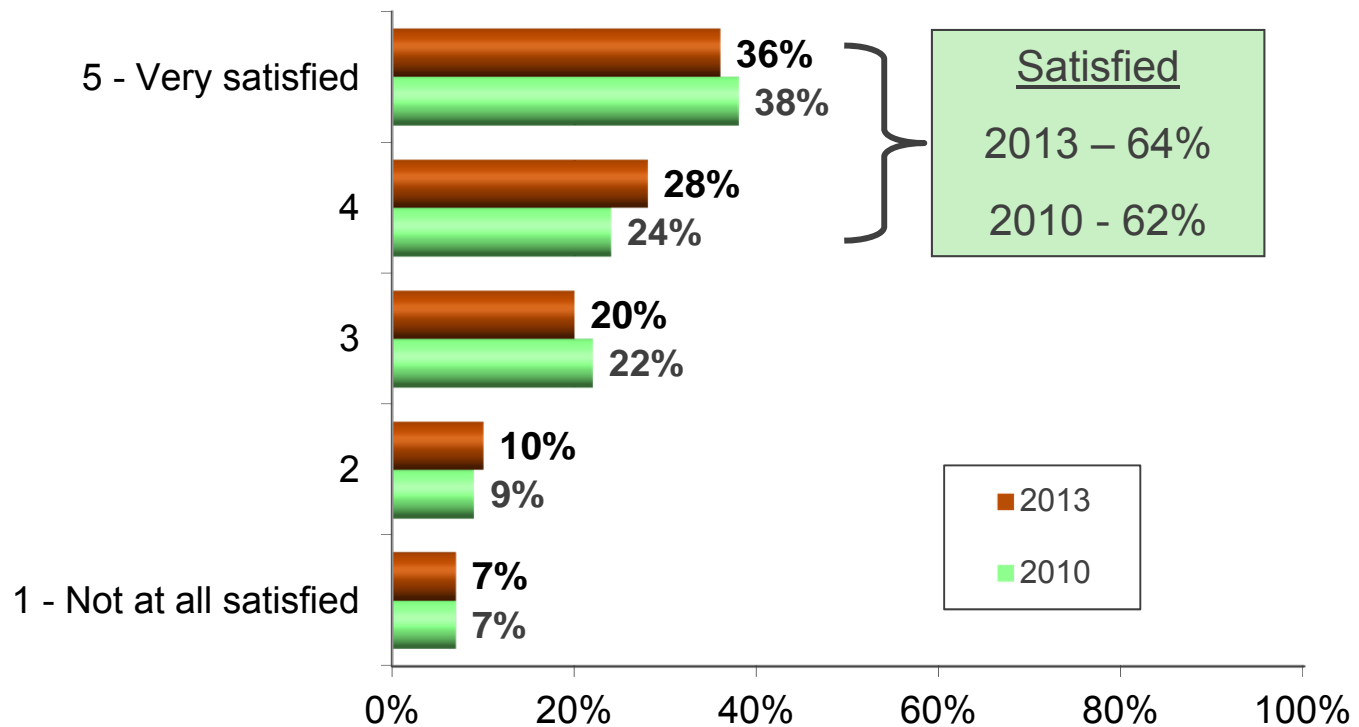
2013
n = 5,717

2010
n = 6,049

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

64% of Commuters are Satisfied with their Commute – About the Same as in 2010

Commute satisfaction is related to ease of commuting - 74% of respondents whose commute is easier than last year and 71% whose commute is the same are satisfied with their commute, compared to 34% whose commute is more difficult



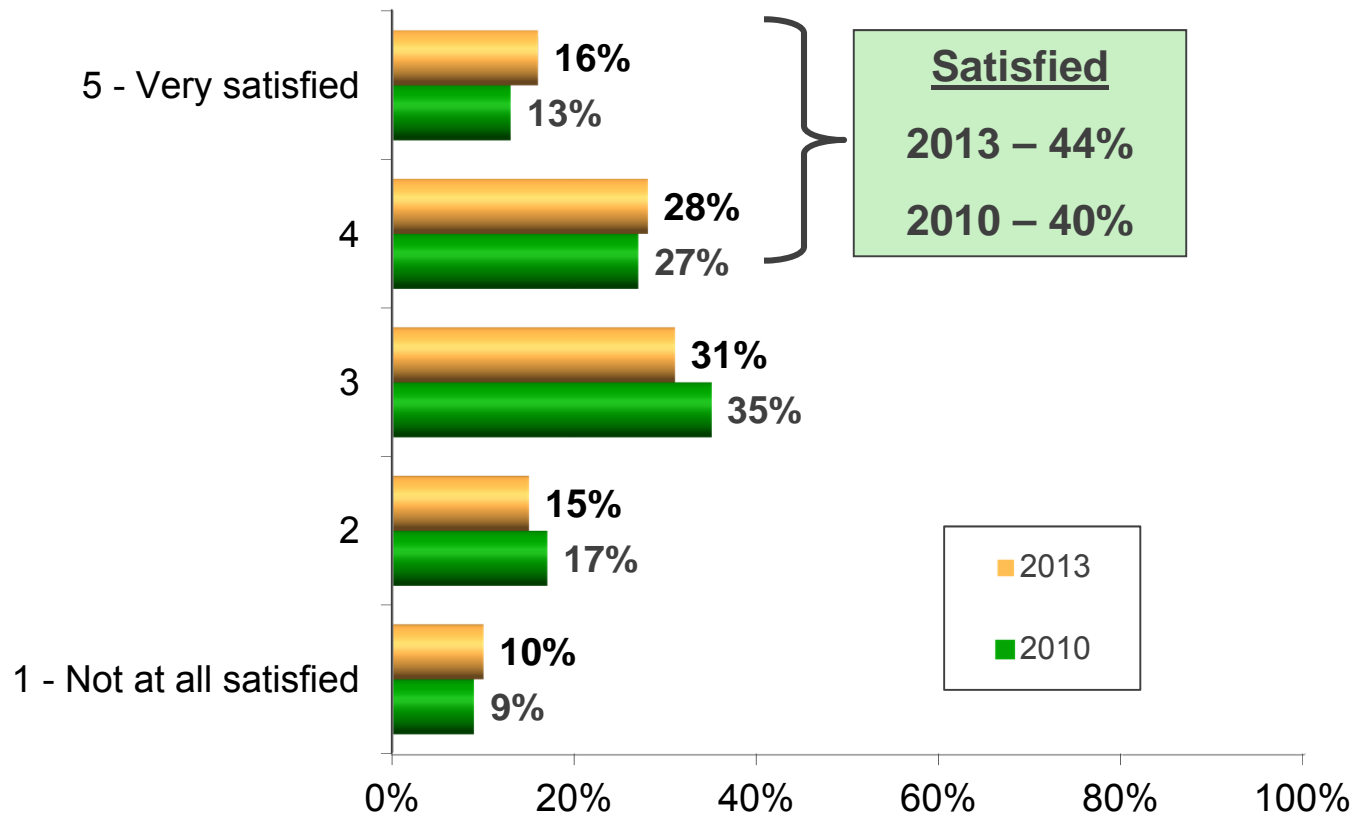
2013
n = 5,692

2010
n = 6,033

Q56f - Overall, how satisfied are you with your trip to work?

Commuters are Less Satisfied with Transportation in the Region, But More Satisfied than in 2010

Only 44% are satisfied (rating of 4 or 5) and a quarter (25%) said they are not satisfied (rating of 1 or 2)



2013
n = 5,486

2010
n = 6,420

Q56e How satisfied you are with the transportation system in the Washington metropolitan region?

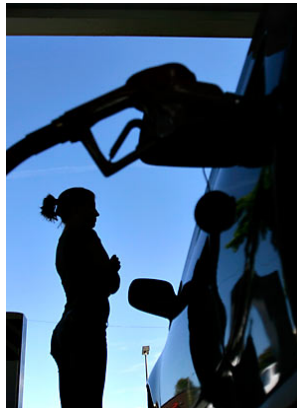
Societal / Personal Benefits of Rideshare

Three survey questions:

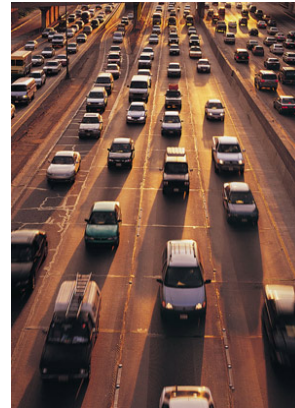
- What impact or benefit does a community or region receive when people use these types of transportation?
- You said you [bicycle, walk, carpool, vanpool, ride public transportation] to work some days. What benefits have you personally received from traveling to work this way?
- On days that you [carpool, vanpool, ride public transportation] to work, how often do you read or write work-related material or check work messages on the way to work?



Personal health



Economics



Congestion



Sustainability

81% of Respondents Cite Societal Benefits from Ridesharing

59% of respondents said use of alternative modes could reduce traffic or congestion and 47% said it could reduce pollution or reduce greenhouse gases

Other 2013 Benefits

Companionship, socialization, sense of community – 3%

Reduce accidents, improve traffic safety – 2%

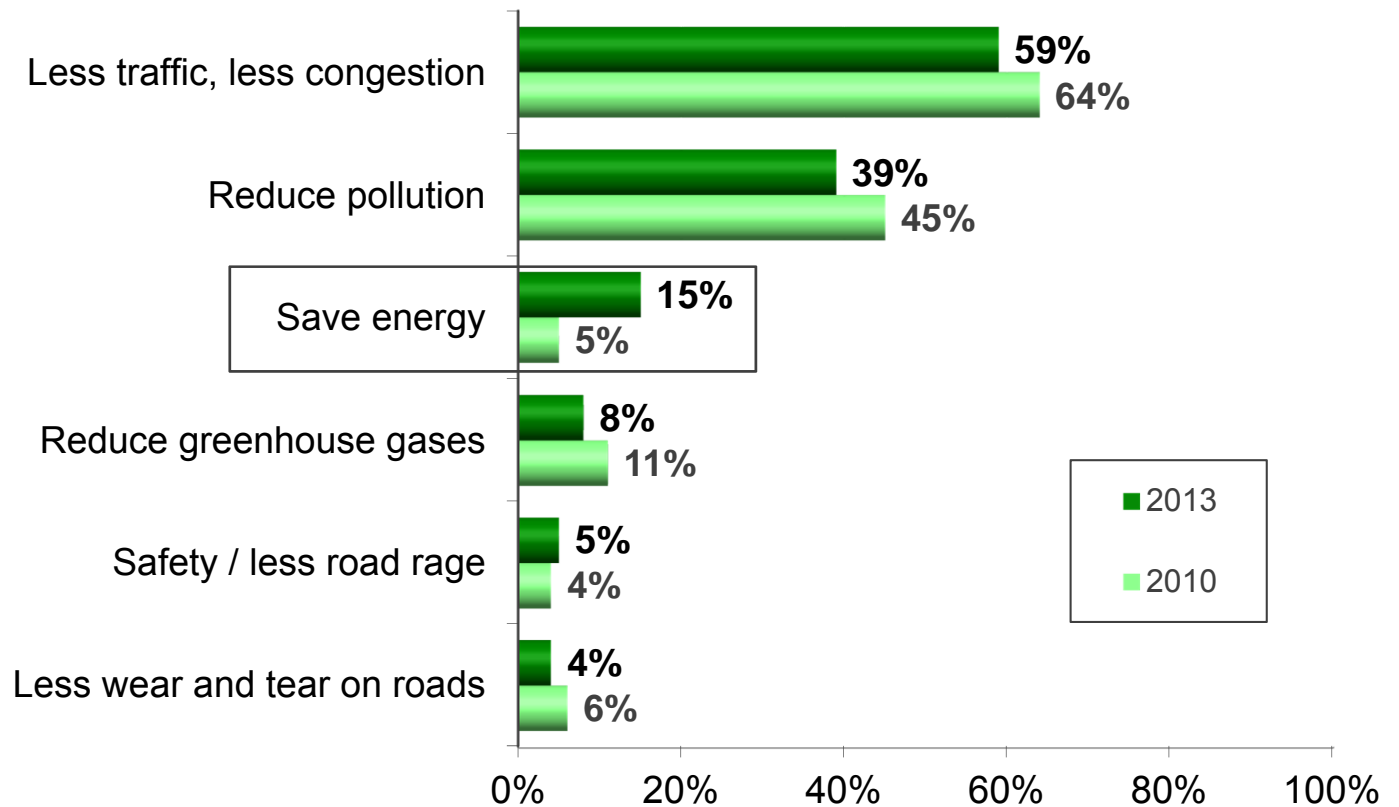
Good for economy, creates jobs – 2%

Reduce government costs – 1%

No need to build more parking – 1%

2013
n = 5,718

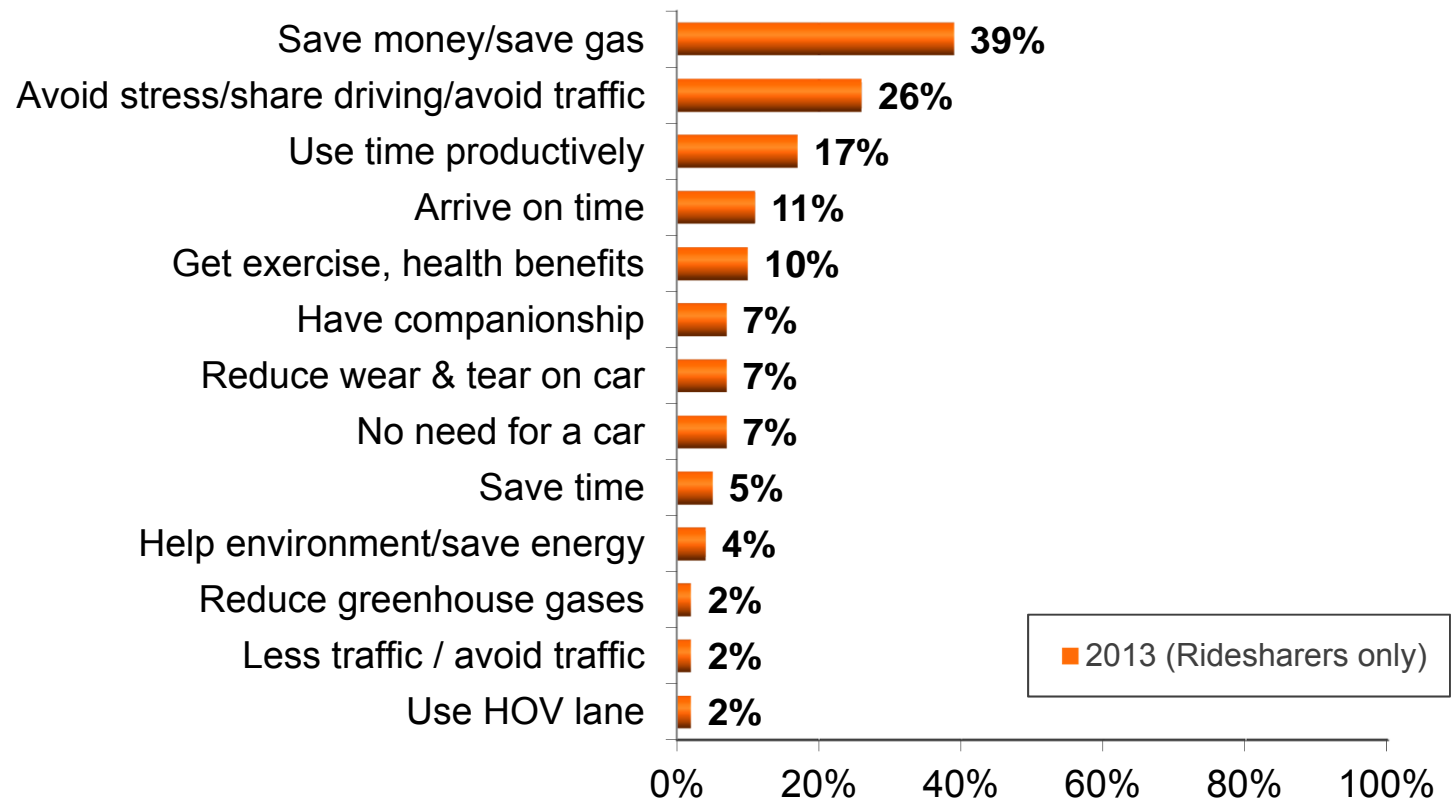
2010
n = 6,050



Q56a. What impact or benefit does a community or region receive when people use these types of transportation?

90% of Ridesharers Cite Personal Benefits of Ridesharing

Respondents mentioned saving money, but also avoiding stress, using time productively, arrive on time, and exercise as benefits



2013
n = 1,575

Q56b. You said you (bicycle, walk, carpool, vanpool, ride public transportation) to work some days. What benefits have you personally received from traveling to work this way?

Respondents Who Use Different Alternatives Cite Different Personal Benefits

Transit riders and bike/walk commuters particularly mention quality of life benefits

Personal Benefit	Carpool/ Vanpool	Bus	Train	Bike/Walk
Save money	45%	43%	32%	38%
Avoid stress, relax	13%	29%	32%	34%
No need for a car	3%	9%	9%	10%
Use travel time productively	8%	19%	24%	5%
Less wear and tear on car	10%	6%	6%	4%
Get exercise	0%	4%	6%	80%
Save time, travel faster	9%	2%	4%	2%
Help the environment	2%	2%	1%	8%
Have companionship during commute	17%	2%	2%	1%
Arrive at work on time	16%	7%	11%	11%

Carpool/Vanpool

n = 363

Bus n = 298

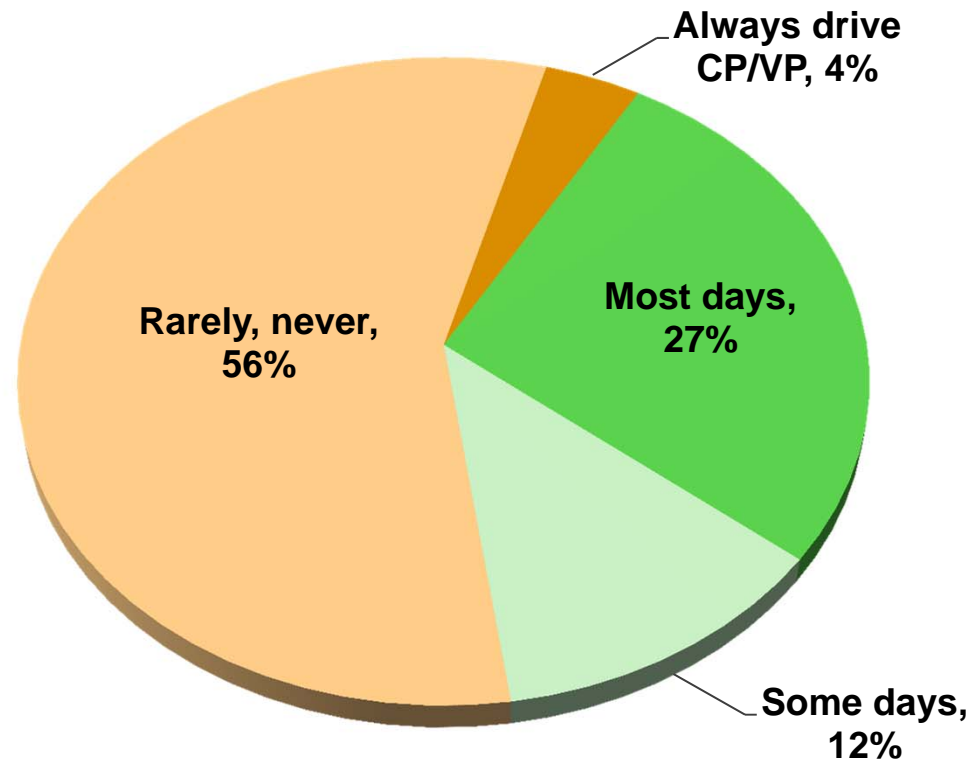
Train n = 678

Bike/Walk n = 150

Q56b. You said you (bicycle, walk, carpool, vanpool, ride public transportation) to work some days. What benefits have you personally received from traveling to work this way?

Four in Ten Commuters who Use Alternative Modes Perform Work-related Tasks During their Commute at Least Some Days

27% perform work-related tasks “most days”



2013
n = 1,438

56d. On days that you (carpool, vanpool, ride public transportation) to work, how often do you do you read or write work-related material or check work messages on the way to work?



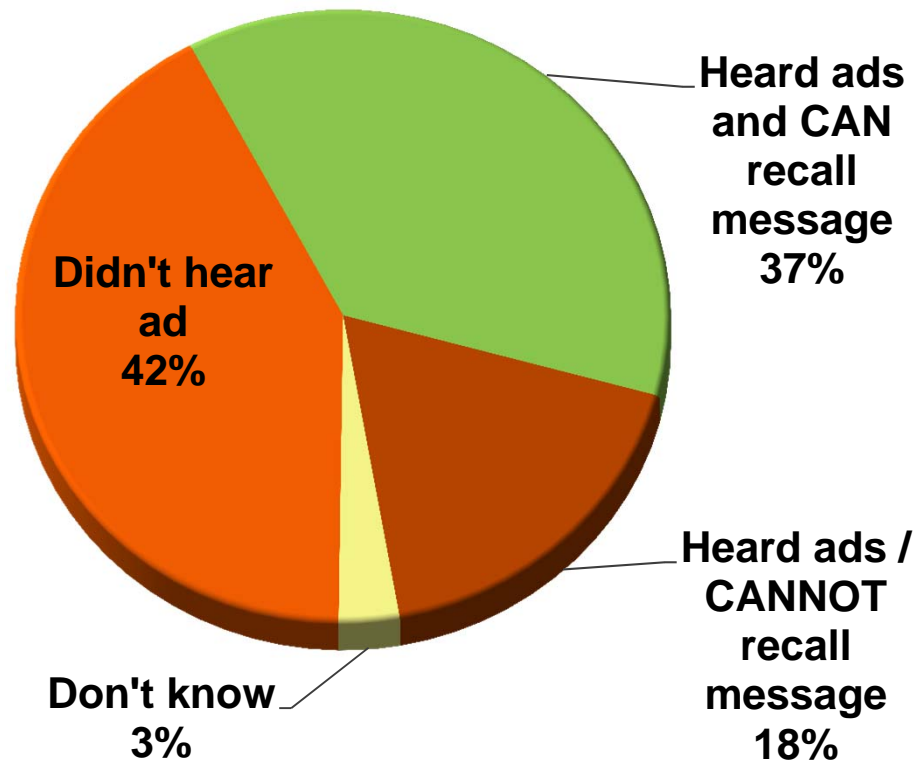
Ads / Awareness

55% of Respondents Recalled Hearing/Seeing Commute Ads in the Past Year

About the Same Share as the 58% Noted in the 2010 Survey

Location / Source:

- Radio – 33%
- Newspaper – 20%
- On train/bus – 20%
- TV – 18%
- Billboard – 9%
- Mail postcard – 5%
- Train station – 5%



2013 SOC
n = 6,335

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

Q62 What messages do you recall from this advertising?

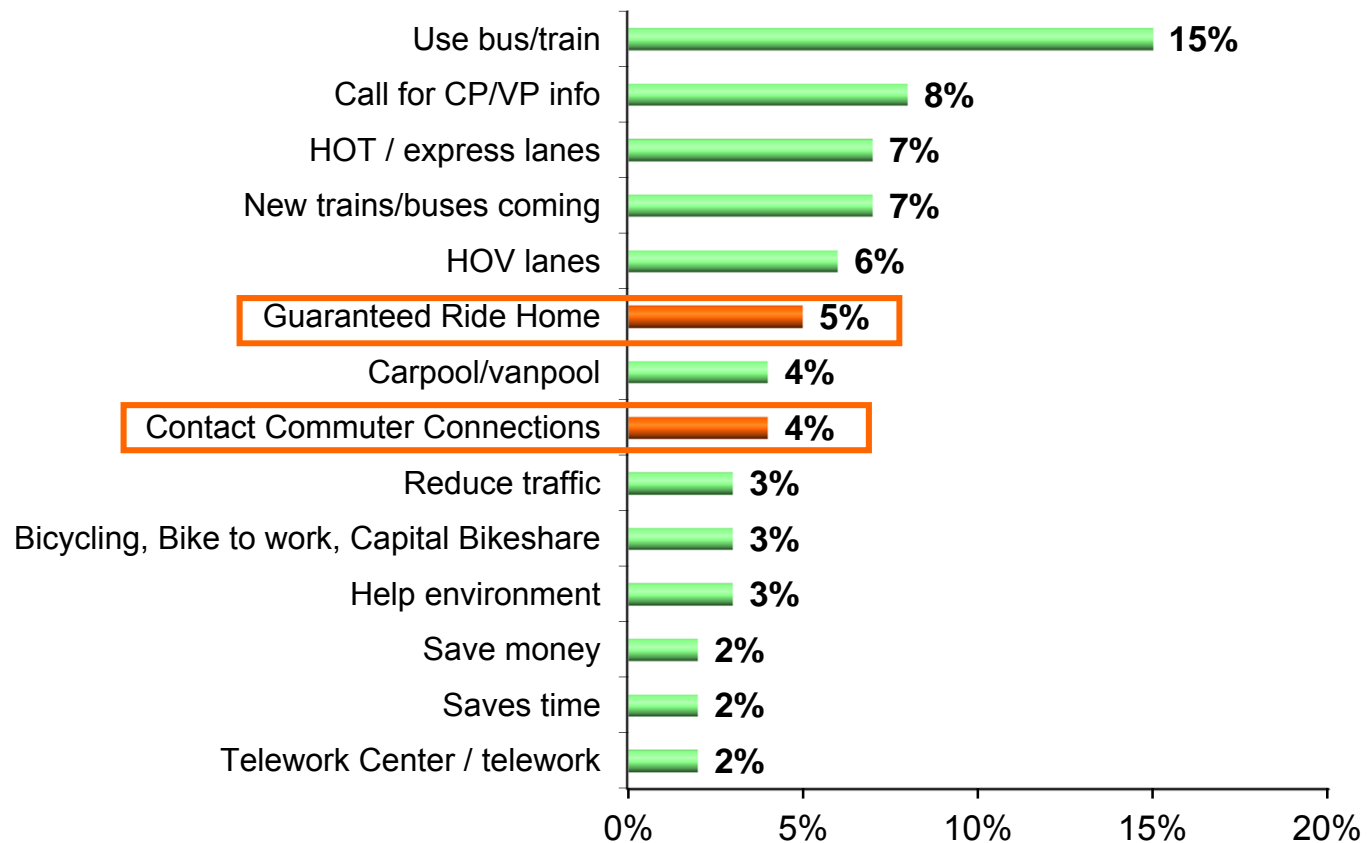
Q63 What organization or group sponsored the ad you recall?

67% of Respondents who were Aware of Ads Could Name a Specific Message

Most cited general rideshare/transit messages or messages about benefits of alternative mode use; 5% mentioned GRH and 4% said “contact Commuter Connections”

Name the sponsor:

- 17% named WMATA
- 12% named Commuter Connections or COG



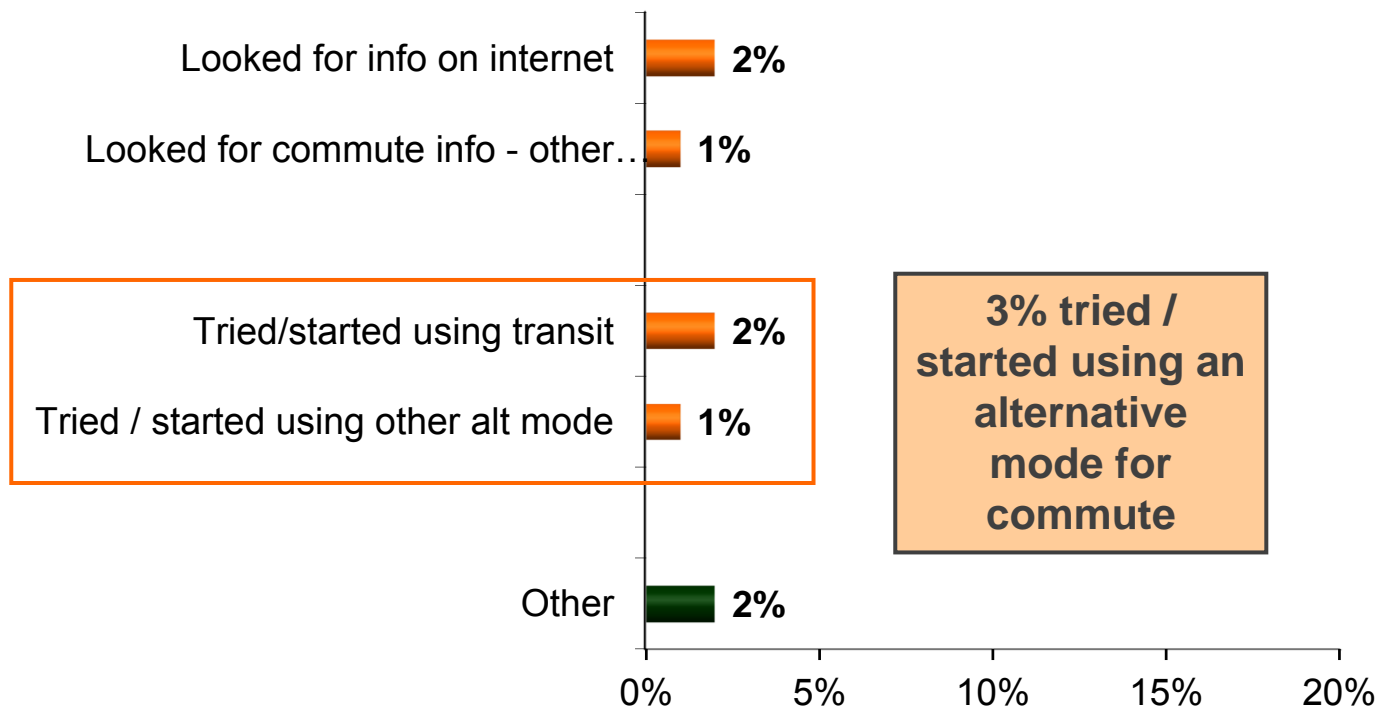
n = 3,733

Q62 What messages do you recall from this advertising

7% of Respondents who Recalled Messages Took an Action to Try to Change their Commute

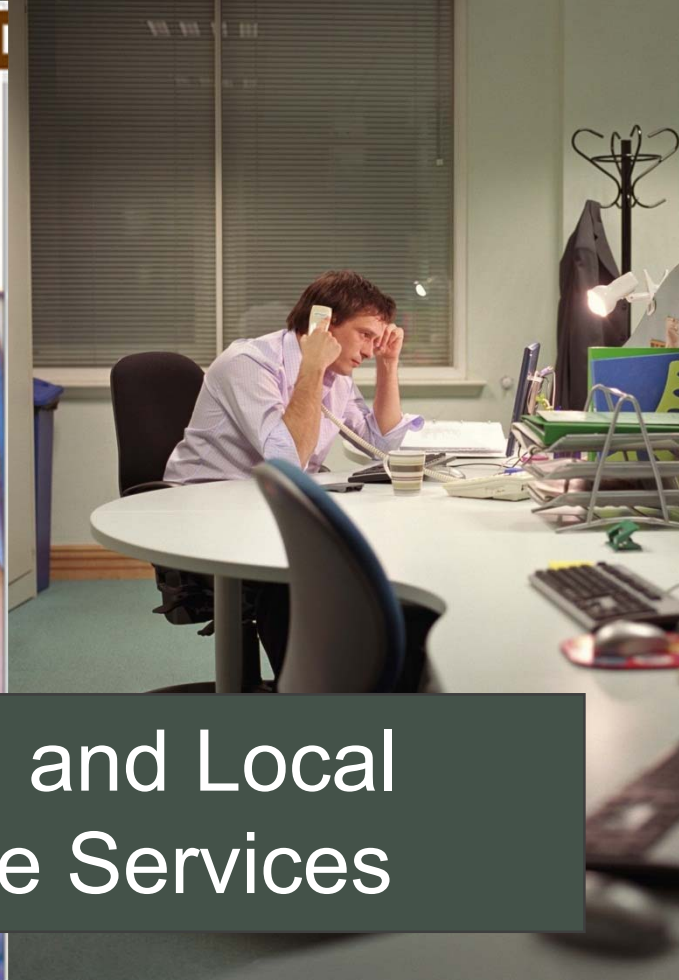
3% tried or started using an alternative mode for their commute

84% 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?
Q68. Did the advertising you saw or heard encourage you to take this action?

n = 2,250

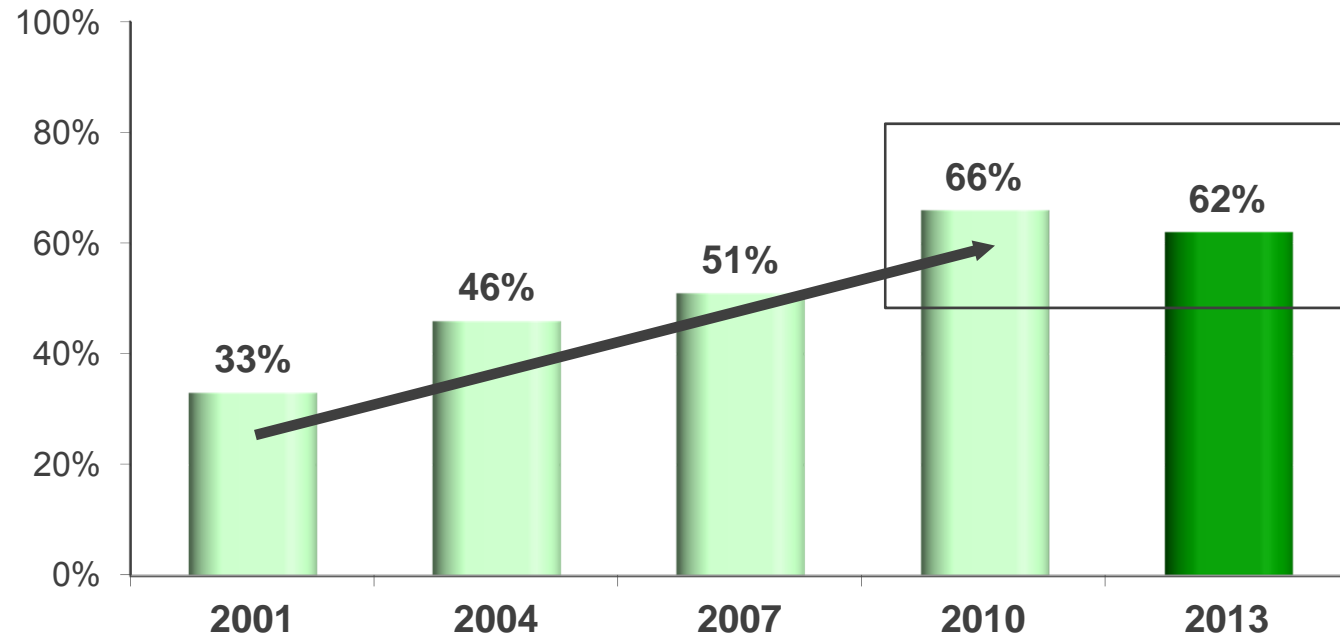


Regional and Local Commute Services



62% of Respondents Said there is a Telephone Number or Website for Commute Information

Awareness of regional commute information resources fell slightly since 2010, but is still higher than in 2007



2001 SOC
N = 7,200

2004 SOC
N = 7,200

2007 SOC
n = 6,600

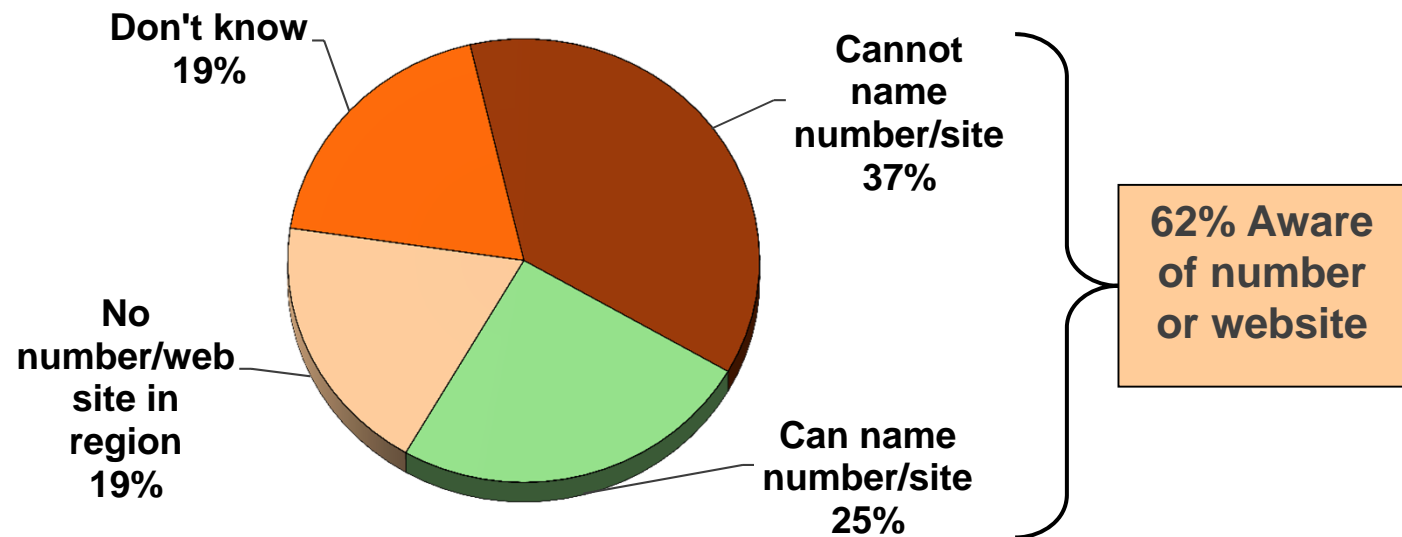
2010 SOC
n = 6,629

2013
n = 6,335

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?

25% of Respondents Can Name Specific Number or Website; the Same Share as in 2010

16% named a Metro/Wmata number/website, 3% named a Commuter Connections number/website, and 2% named a Commuter Connections partner number/website



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?

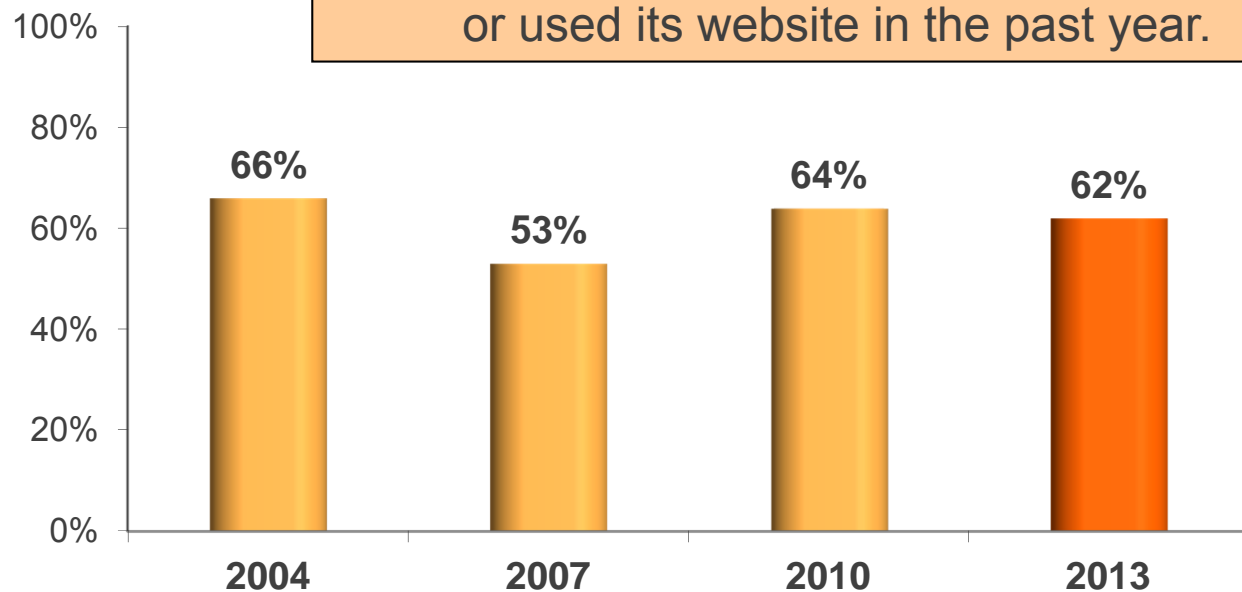
Q83 What is the phone / website?

n = 6,335

62% of Regional Employees Know of Commuter Connections; a Slight Decline Since 2010

USE of Commuter Connections increased from 5% to 6% of the employed residents of the region

10% of respondents who knew about Commuter Connections contacted the program or used its website in the past year.



2004 SOC
n = 7,200

2007 SOC
n = 6,600

2010 SOC
n = 6,629

2013 SOC
n = 6,335

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

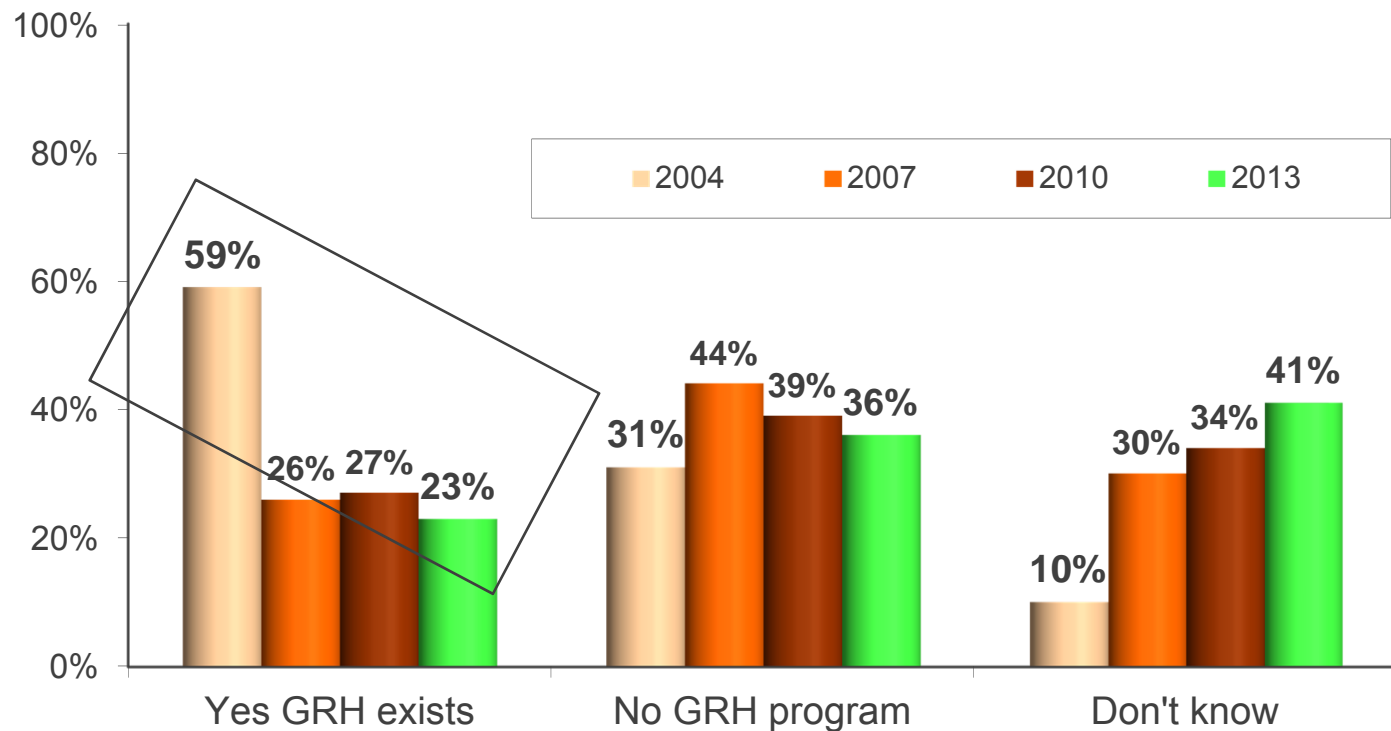
23% of all Respondents Know There is a Regional GRH Program

Slightly less than knew of GRH in 2010 (27%) and 2007 (26%), but a large decrease from 2004, when 59% knew of GRH

Of commuters who said there is a GRH program,

28% named Commuter Connections as the sponsor

56% didn't know the sponsor



2004 SOC
n = 6,867

2007 SOC
n = 6,071

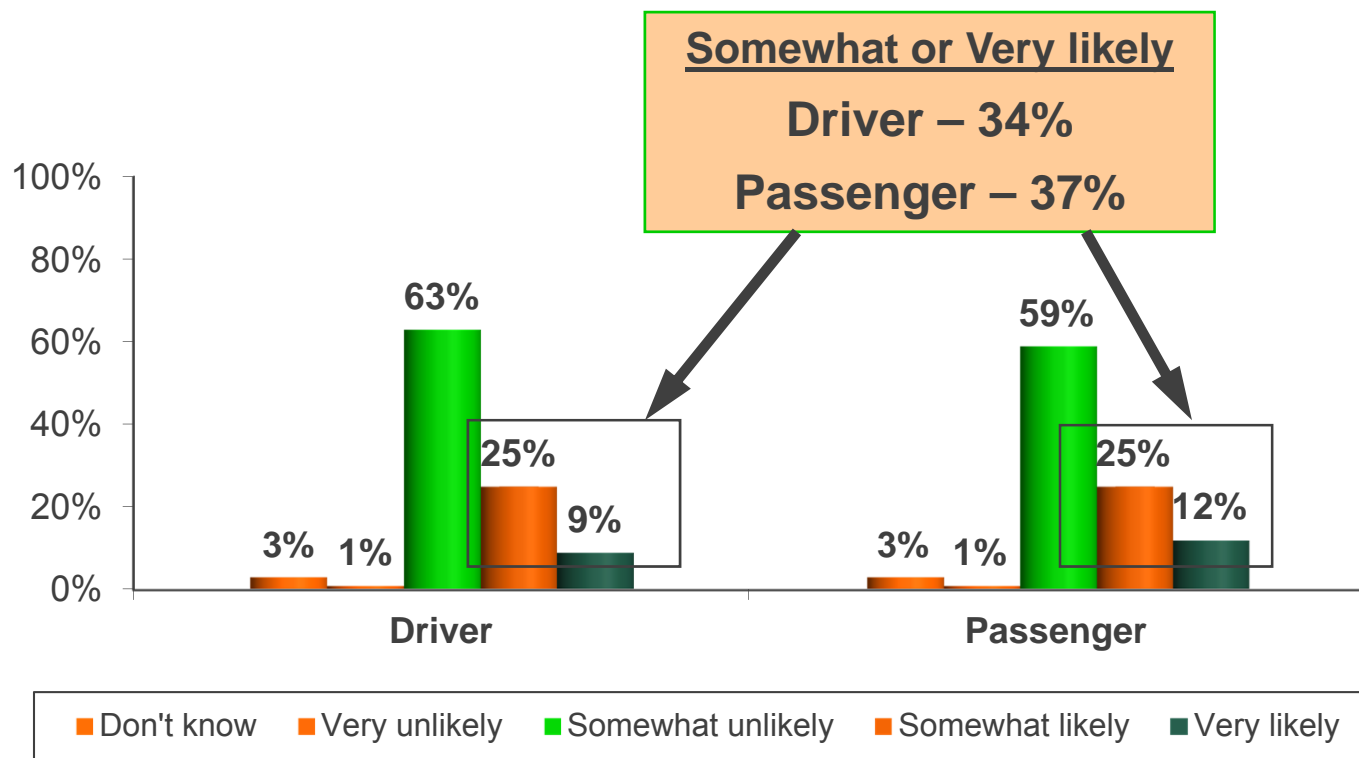
2010 SOC
n = 6,084

2013 SOC
n = 5,738

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?

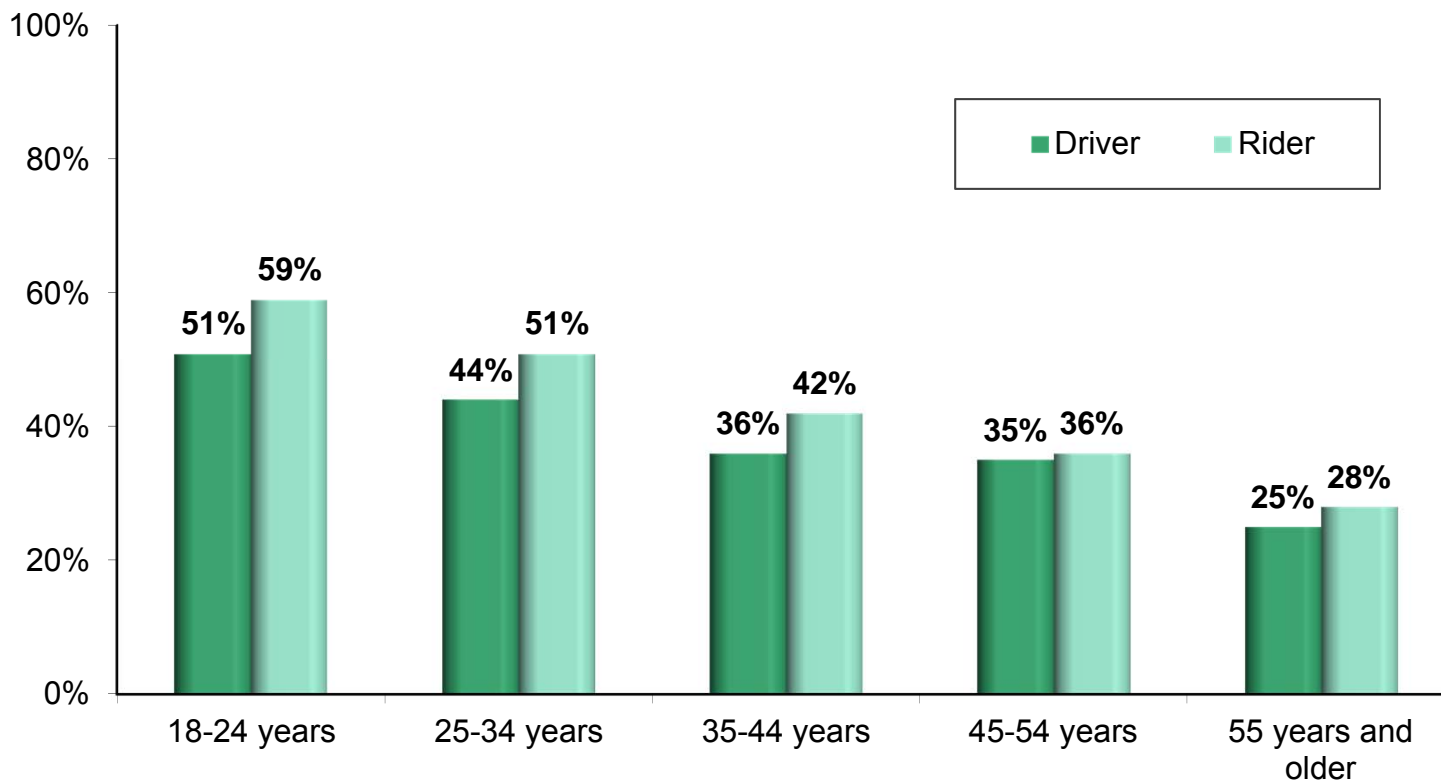
More than a Third of Commuters Expressed Interest in “Instant Carpooling”

Commuters are slightly more interested in using the service as a passenger than driver, even with a \$0.20 per mile charge



88h Now, I'd like your opinion on a new service that might be offered in the Washington area – that is, an instant carpool service that would make it easy for you to arrange to share a ride for a single trip on short notice. Registered members who want to share a ride would post a request to a Smart phone-accessible application. Other members would be notified of requests through email or texts and could respond for rides they are willing to share. If a service like this was available in the region and drivers were paid \$0.20 per mile when they provide a ride, how likely would you be to use it when you are the driver?
 Q88k How likely would you be to use it when you are a rider or passenger, if you had to pay \$0.20 per mile?

Young Respondents Showed More Interest than Older Respondents in “Instant Carpooling” as Both Driver and Rider



18-24 years
n = 193

25-34 years
n = 665

35-44 years
n = 1,319

45-54 years
n = 1,884

55 year and older
n = 2,066

88h Now, I'd like your opinion on a new service that might be offered in the Washington area – that is, an instant carpool service that would make it easy for you to arrange to share a ride for a single trip on short notice. Registered members who want to share a ride would post a request to a Smart phone-accessible application. Other members would be notified of requests through email or texts and could respond for rides they are willing to share. If a service like this was available in the region and drivers were paid \$0.20 per mile when they provide a ride, how likely would you be to use it when you are the driver?

Q88k How likely would you be to use it when you are a rider or passenger, if you had to pay \$0.20 per mile?

Awareness of Local Services Ranges from 11% to 56%; Use Ranges from 1% to 18%

Prince William
n = 606

Frederick
n = 594

Arlington
n = 851

Loudoun
n = 635

Southern Maryland
n = 1,170

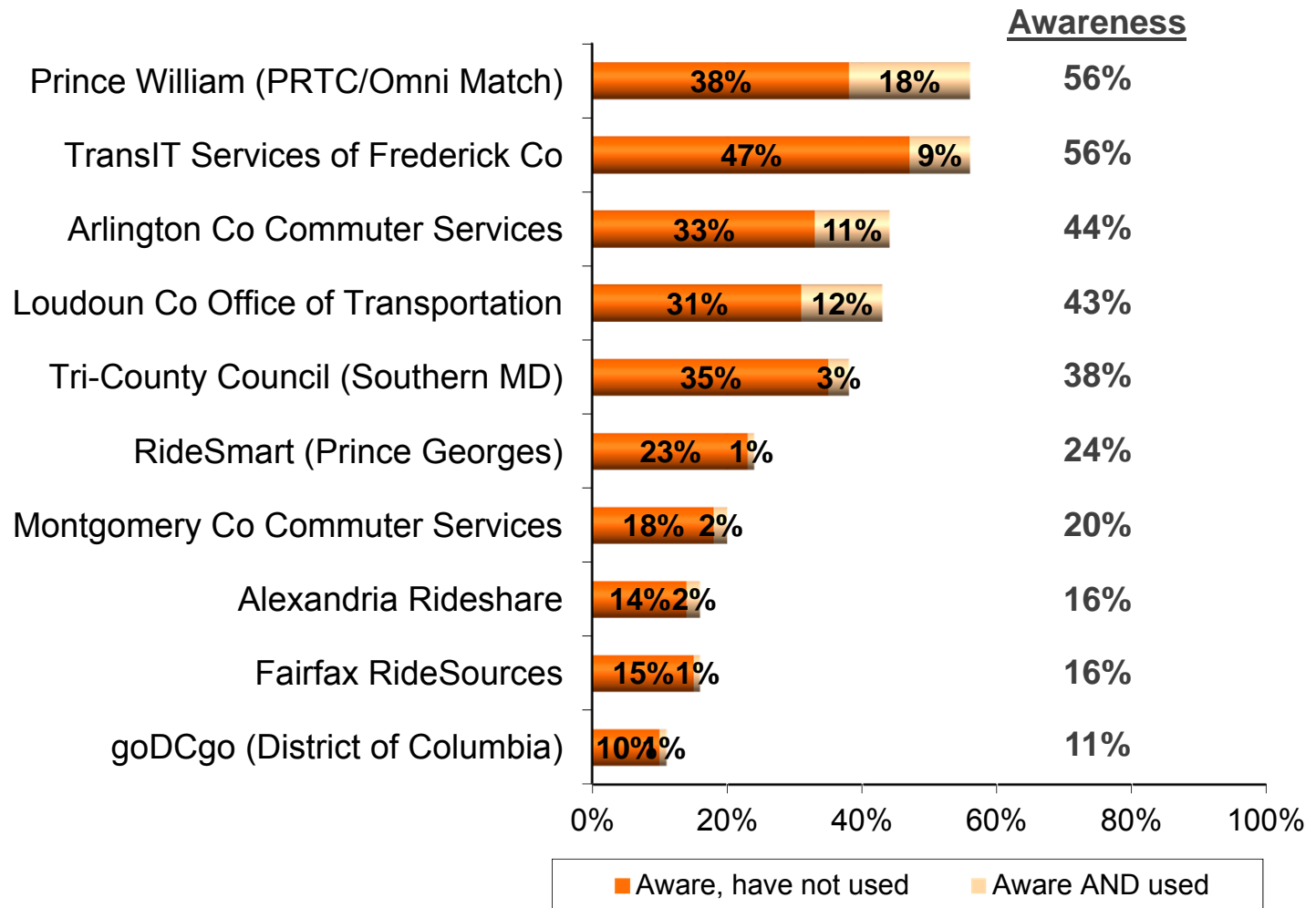
Prince George's
n = 859

Montgomery
n = 868

Alexandria
n = 728

Fairfax
n = 1,200

District of Columbia
n = 1,940



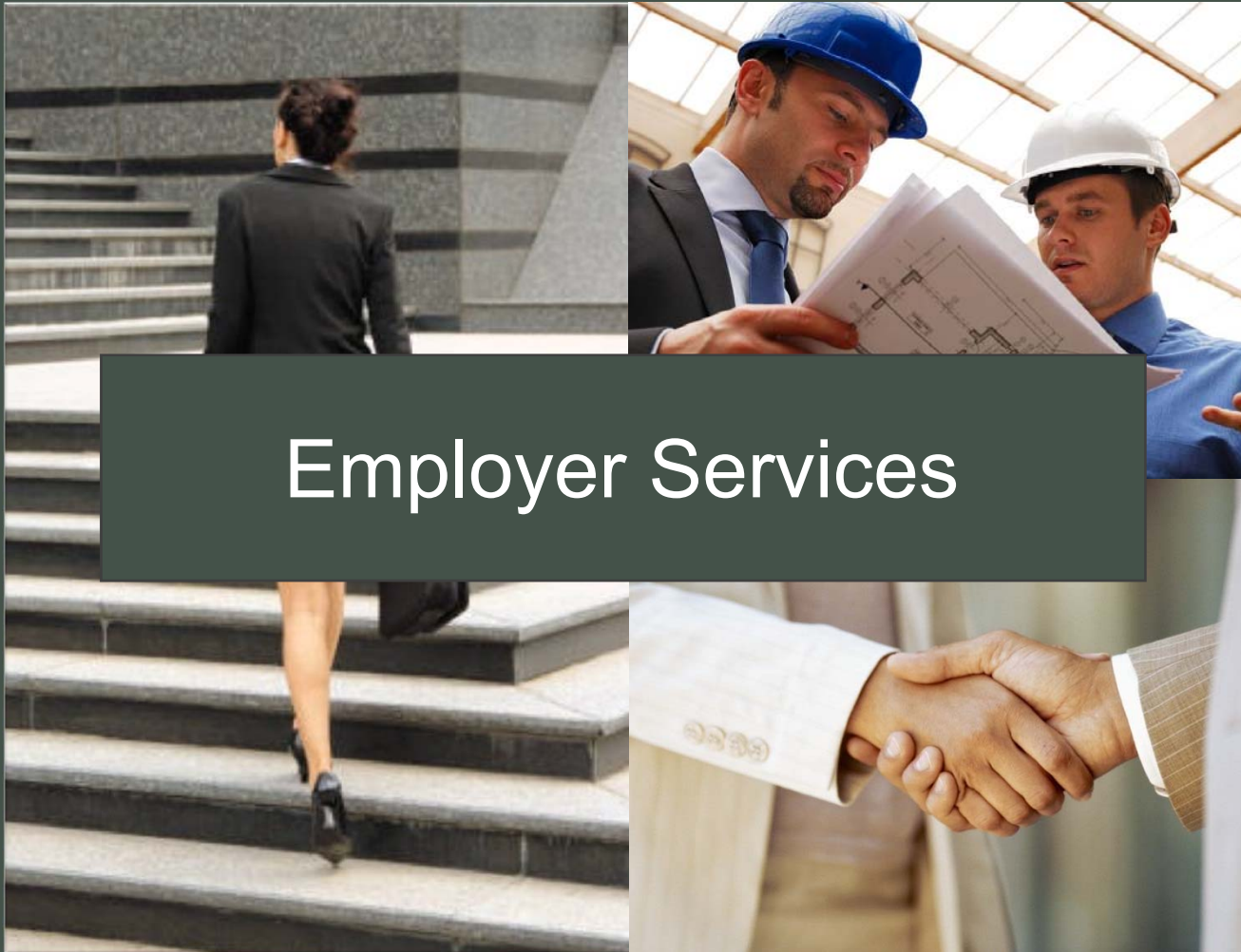
Q88d. Have you heard of an organization called [_____]?

Q88e. Have you contacted [_____] in the past year or visited a website sponsored by this organization?



Use of Local Services

- Generally higher for programs in **outer jurisdictions**. Possibly 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 higher for programs associated with **transit agencies** (Frederick, Loudoun, Prince William).
 - This connection might be due to higher visibility of the services or to the concentrated nature of the services offered by the organization.
 - In the inner jurisdictions, transit assistance is provided by transit organizations that are separate from the local commute assistance program.
-



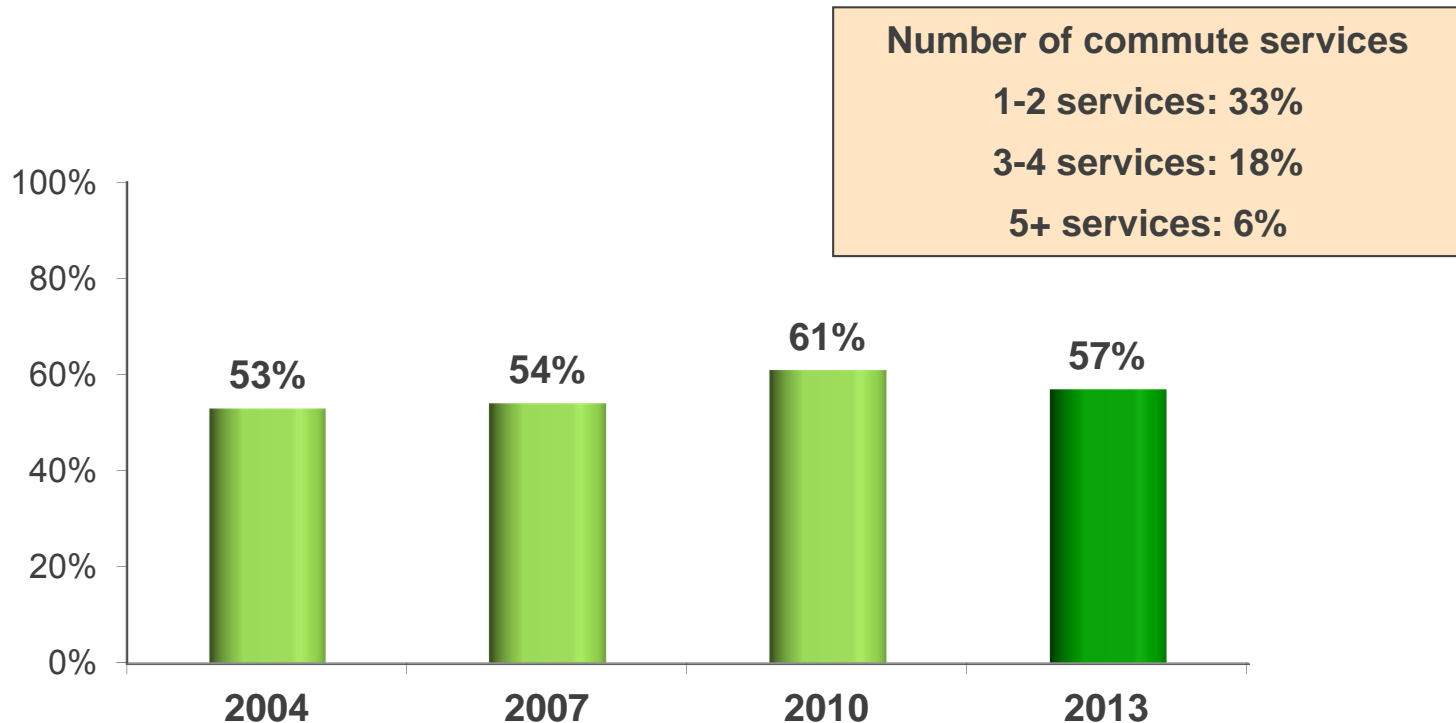
Employer Services





57% of Respondents who are Not Self-Employed said their Employers Offer Commute Incentives or Support Services

This is a slight drop from the 61% availability in 2010; possibly due to recession cost-cutting



2013 SOC
n = 5,524

2010 SOC
n = 5,899

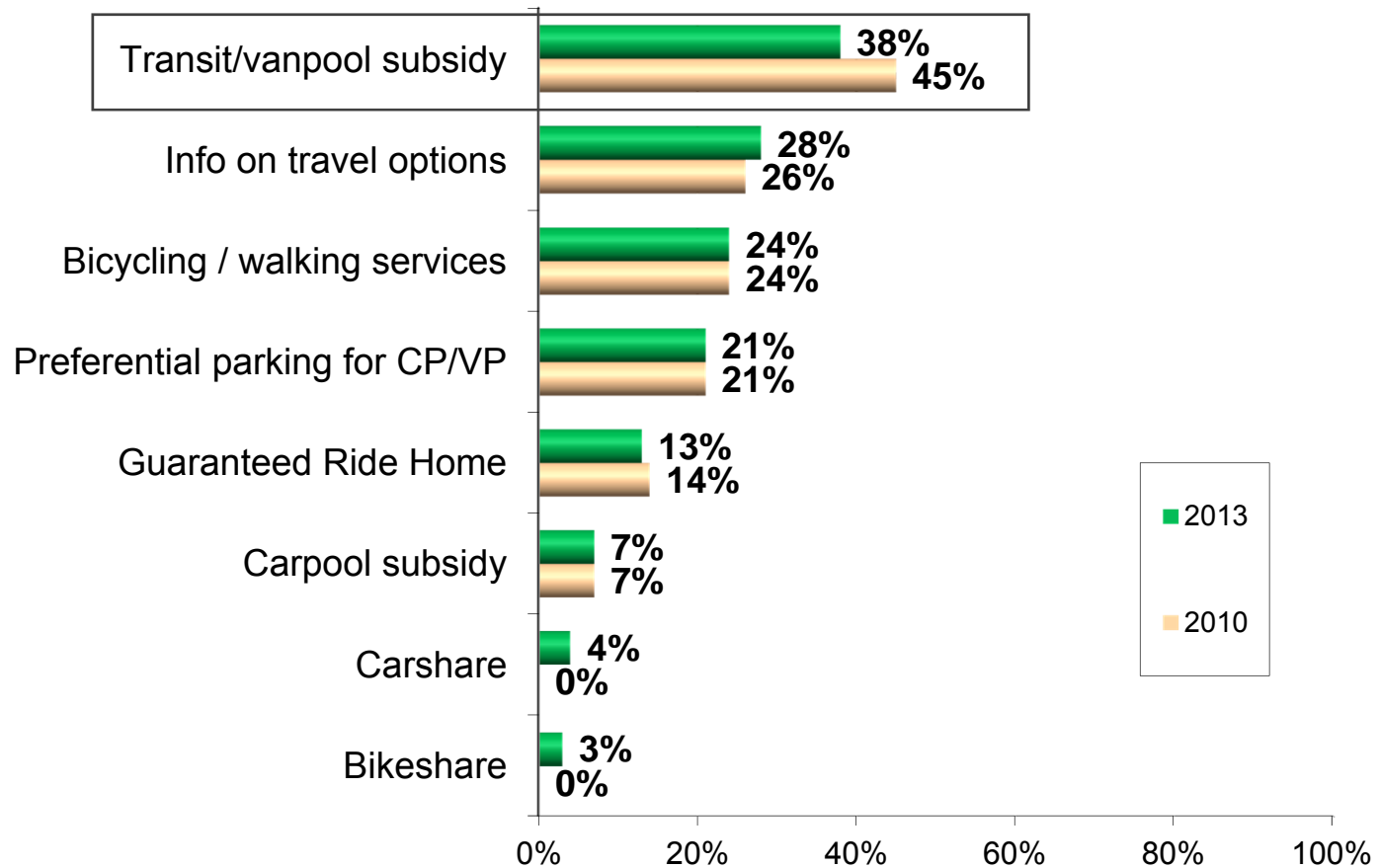
2007 SOC
n = 6,071

2004 SOC
n = 6,866

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.... ?

The Most Widely Available Service in 2013 is a Transit/Vanpool Subsidy (38% of Respondents)

But fewer respondents have this subsidy now than in 2010; Availability of other services has remained the same



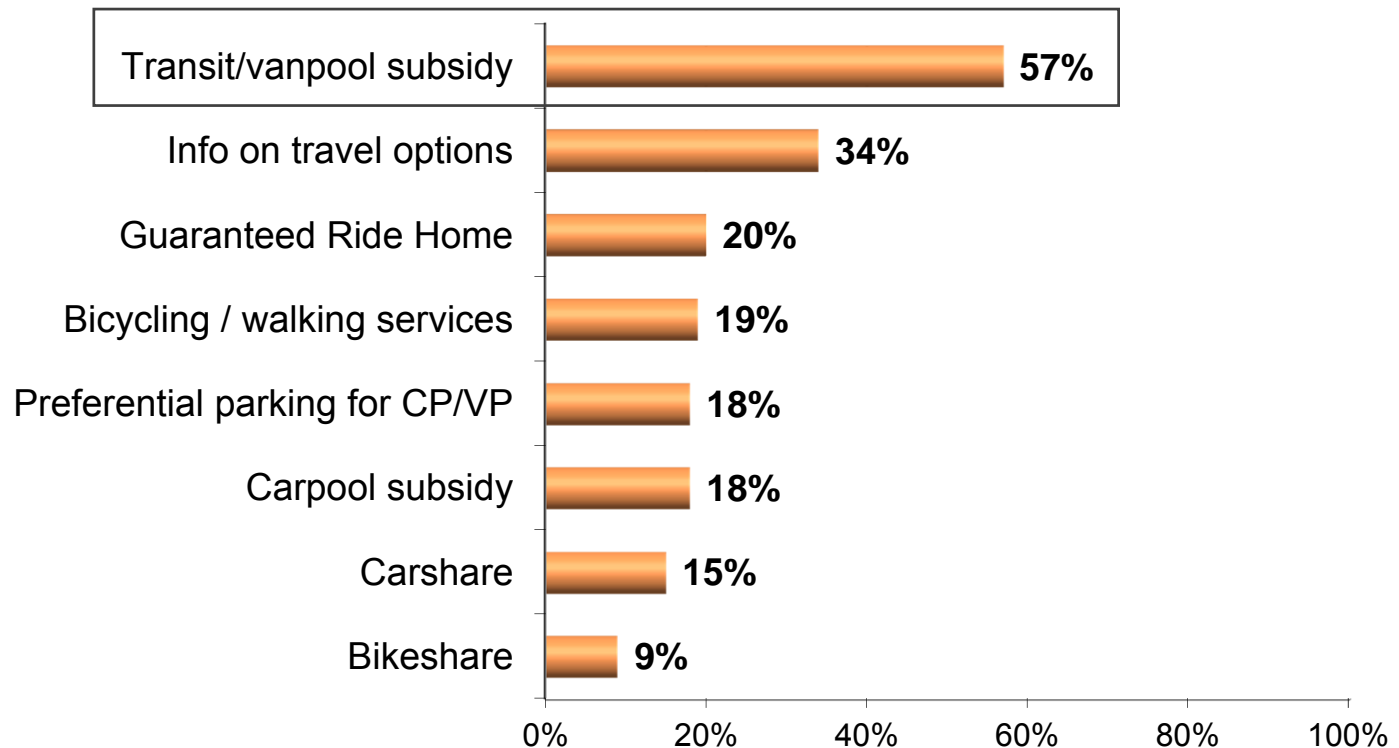
2013 SOC
n = 5,524

2010 SOC
n = 5,899

Q89 Next please tell me if your employer makes any of the following commute services or benefits available to you.

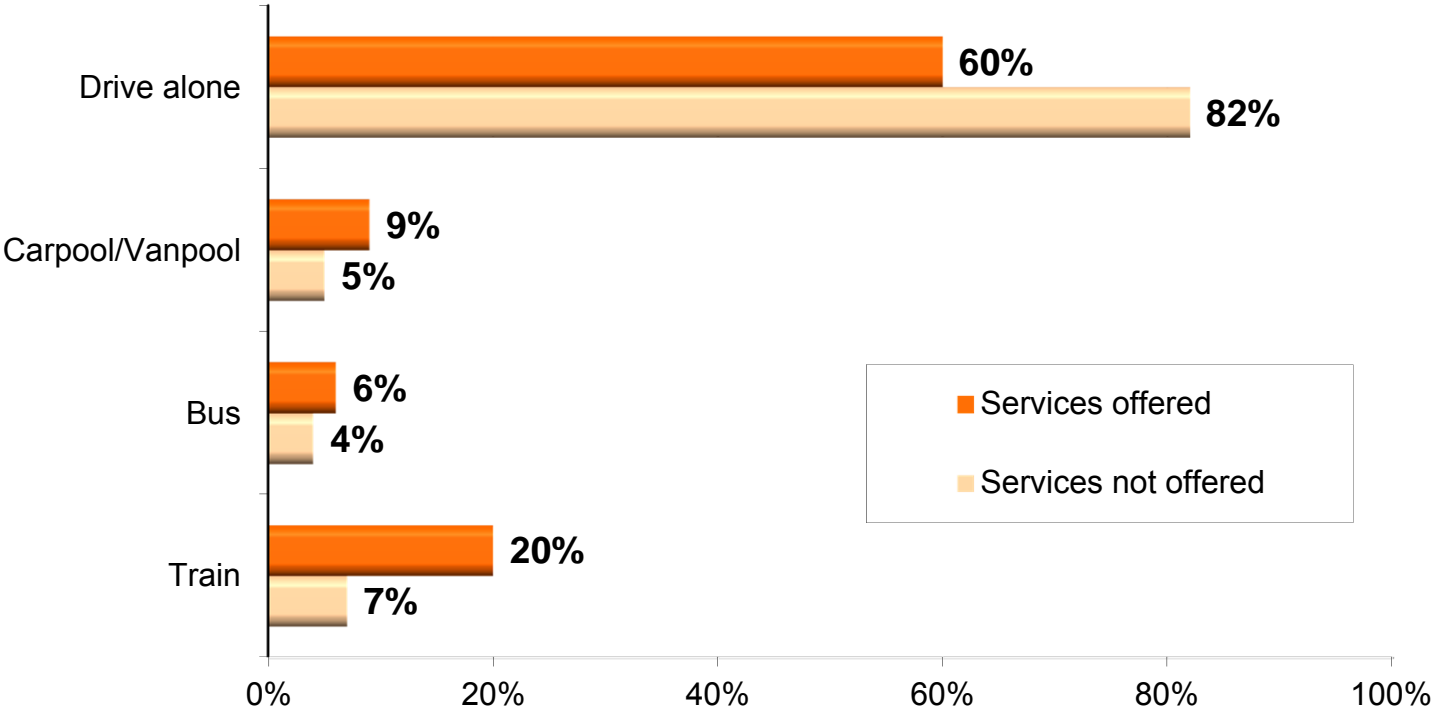
The Most Widely USED Employer Service Also is a Transit / Vanpool Subsidy – used by 57% of respondents with access to the service

34% of respondents with access had used travel option information; other services used by two in ten with access



The Drive Alone Mode Split is Much Lower for Respondents who Have Access to TDM at Work


The transit share is particularly high for these respondents



Services offered
n = 3,080

Services not offered
n = 2,426

Q89a Which of those services have you used?



Summary of Top Survey Findings



Joan M. Mas 2/2007





Commute Key Findings

66% of regional commuters drive alone to work – a slight increase from the 64% in 2010

Commuters who live or work in the “Core” area drive alone at a much lower rate than do other commuters

34% of commuters who use alternative modes previously drove alone; 35% shifted from another alternative mode

The average commute distance has fallen since 2010, from 16.3 miles to 16.0 miles one way, but the average commute time remained steady at 36 minutes



Telework Key Findings

Telework growth has continued since 2010, but at a slower rate
– from 25% in 2010 to 27% in 2013

More than half of regional teleworkers telework 1+ days per week - the average telework frequency increased from 1.3 days per week in 2010 to 1.4 days per week in 2013

10% of teleworkers received telework Info from COG

470,000 additional commuters “could and would” telework if given the opportunity



Commute Satisfaction Key Findings

17% of commuters report that their commute is easier now than a year ago; 23% said it is more difficult

64% of commuters are satisfied with their commute; but only 44% are satisfied with transportation in the metro region

81% of all commuters recognize that ridesharing offers societal benefits – reduced traffic, pollution

90% of ridesharers cite personal benefits of using alternative modes – reduced cost, stress; productive use of time

39% of ridesharers perform work tasks during their commute



Commute Service Key Findings

62% of commuters said commute info number/website is available, but only 25% can name a specific number/site

62% of commuters know of Commuter Connections and 6% of all regional commuters have used a CC service

Awareness of local commute services ranged from 11% to 56%

A third of commuters are somewhat or very likely to use an “instant carpool” service as either a driver or passenger

57% of employers offer workplace commute services, a drop from 61% in 2010, likely due to recession cost-cutting



Questions?

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