



TERM Evaluation Project
2010 State of the Commute Survey
TPB Technical Committee
July 9, 2010

Methodology

- Fourth triennial survey (2001, 2004, 2007, 2010)
- Telephone survey of 6,629 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
- Data collection conducted by CIC Research, Inc.
- Preliminary data analysis conducted by LDA Consulting



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 service
- Employer commute assistance

New Sections for 2010

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





Preliminary Highlights

- Commute Patterns
- Telework
- Travel Facilities
- Commute Ease and Satisfaction
- Awareness of Commuter Connections
- Employer Services

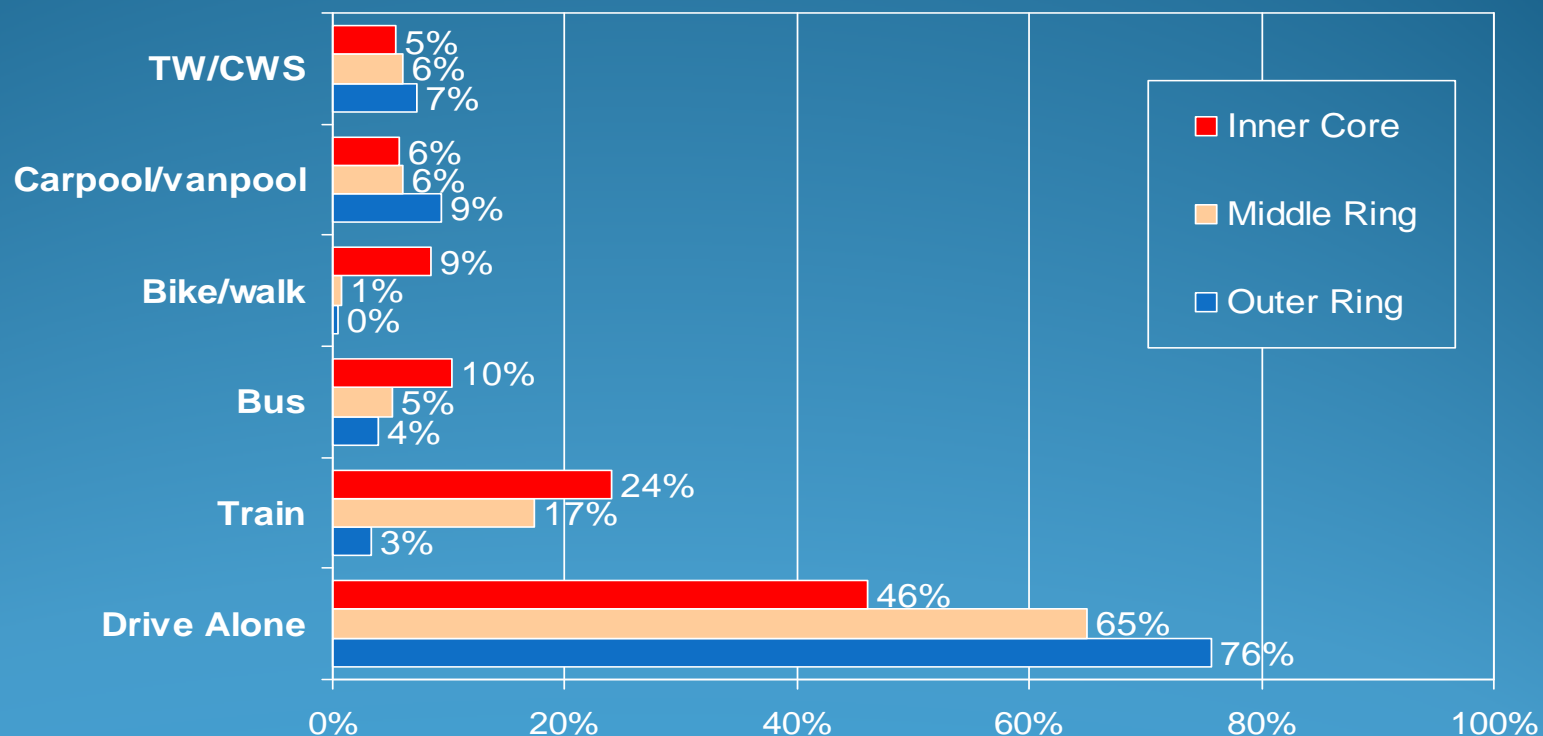
Commute Mode by Region Sub-Area

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

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

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

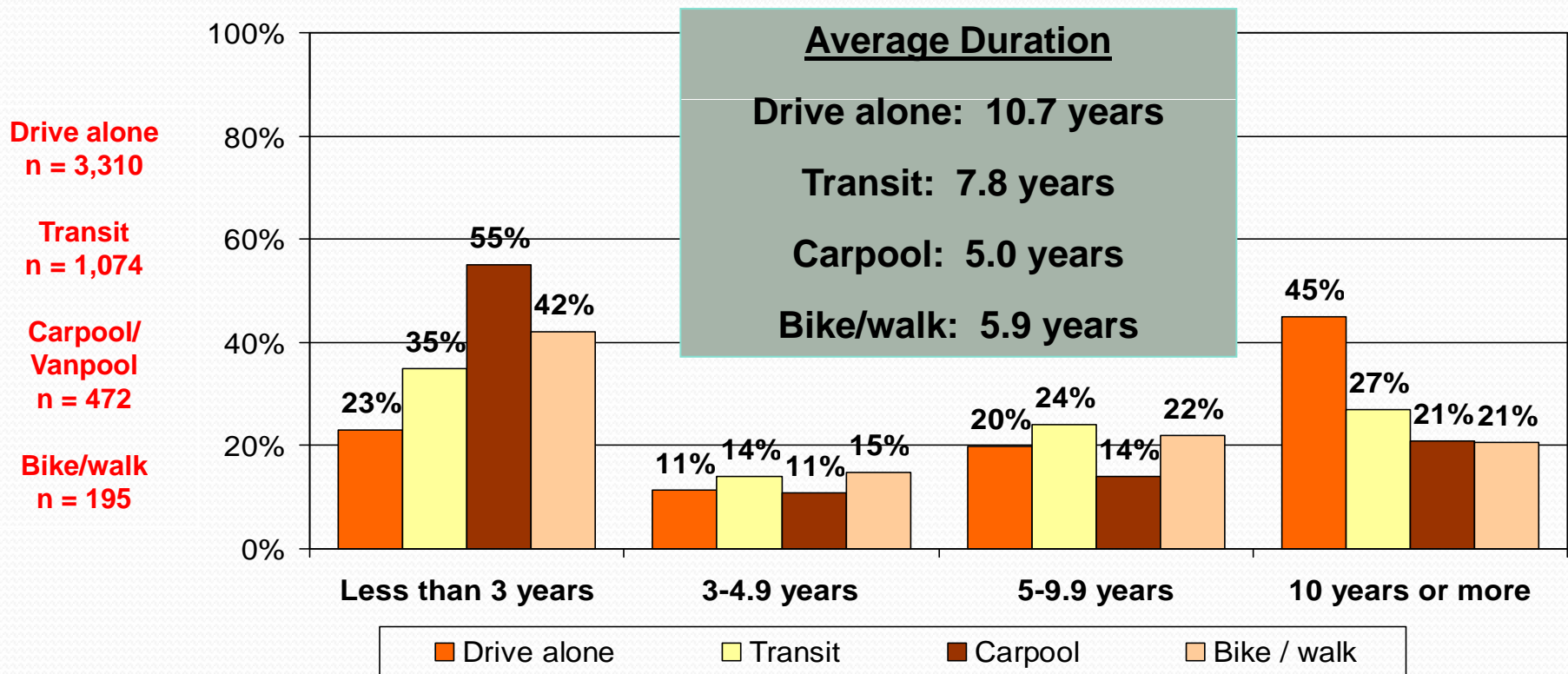
Outer Ring
(Calvert, Charles, Frederick, Loudoun, Prince William)
n = 2,844



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

Mode Duration

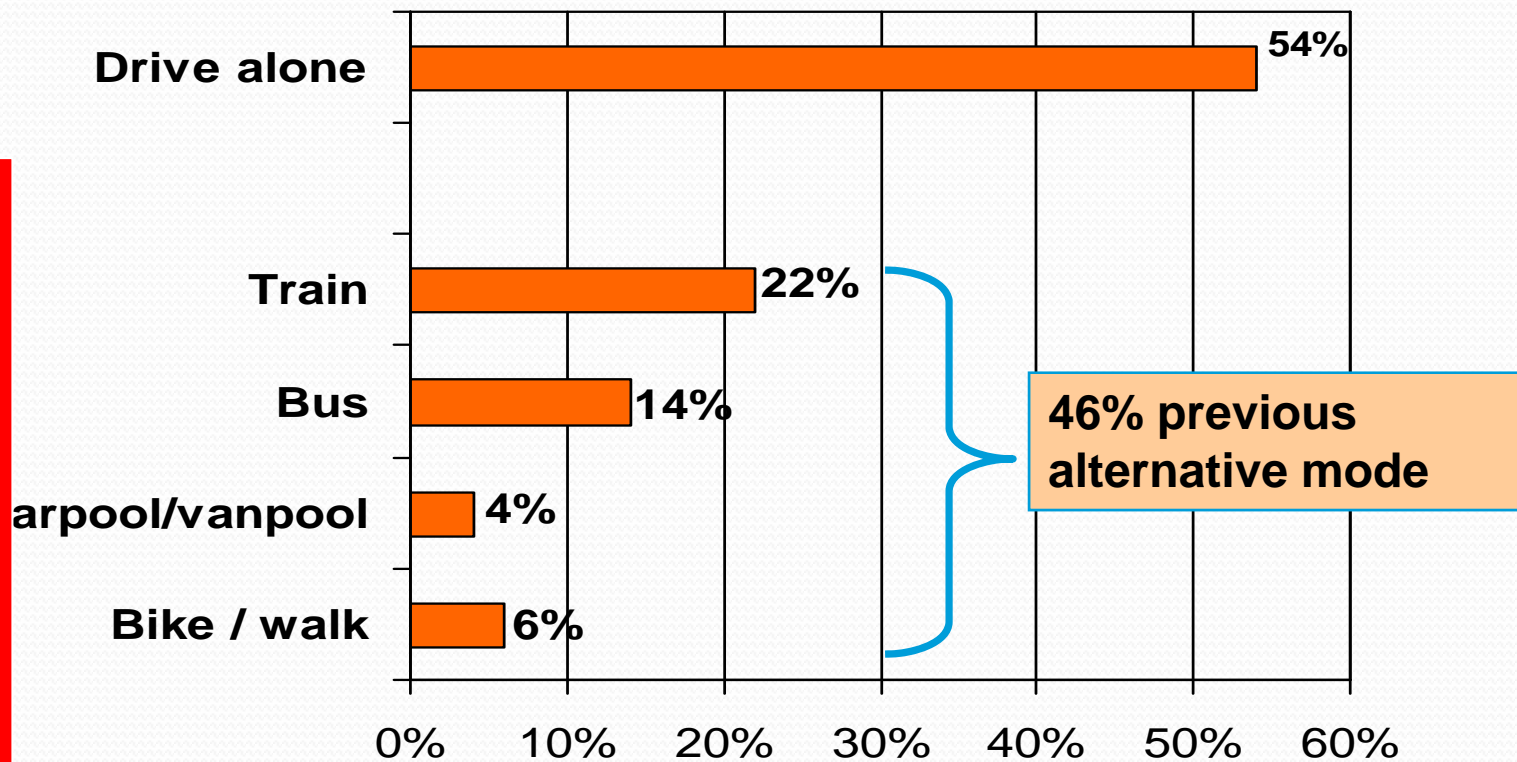
55% of commuters who carpool started using this mode within the past three years. Commuters who drove to work had used this mode longer on average than had commuters who used alternative modes.



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

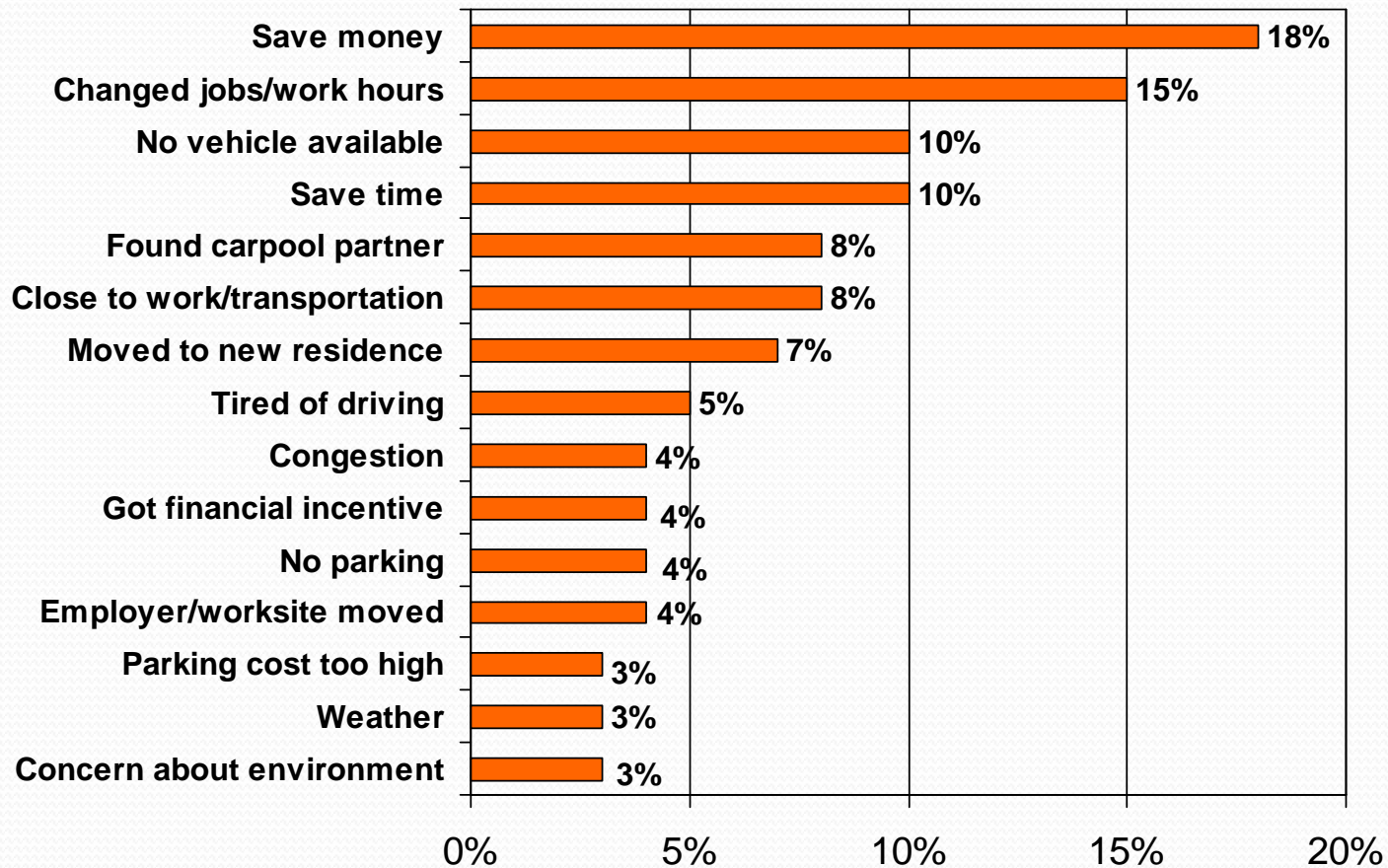
More than Half of Alternative Mode Users Previously Drove Alone; the remaining 46% Shifted from Another Alternative Mode

n = 535
Excludes 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?

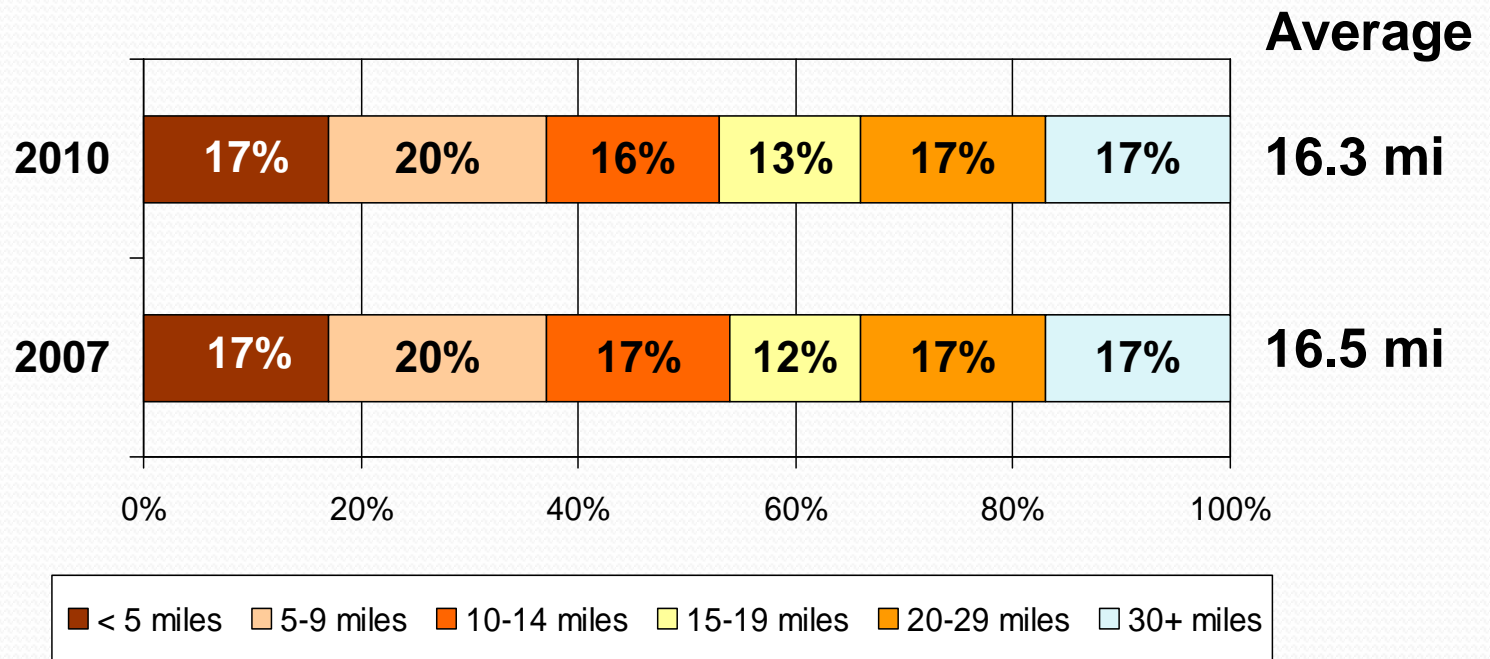
18% of Residents Who Use Alternative Modes for Commuting Started Using These Modes to Save Money



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

Commute Distance (miles)

Commute distances remained stable since 2007. In 2010, commuters traveled an average of 16.3 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



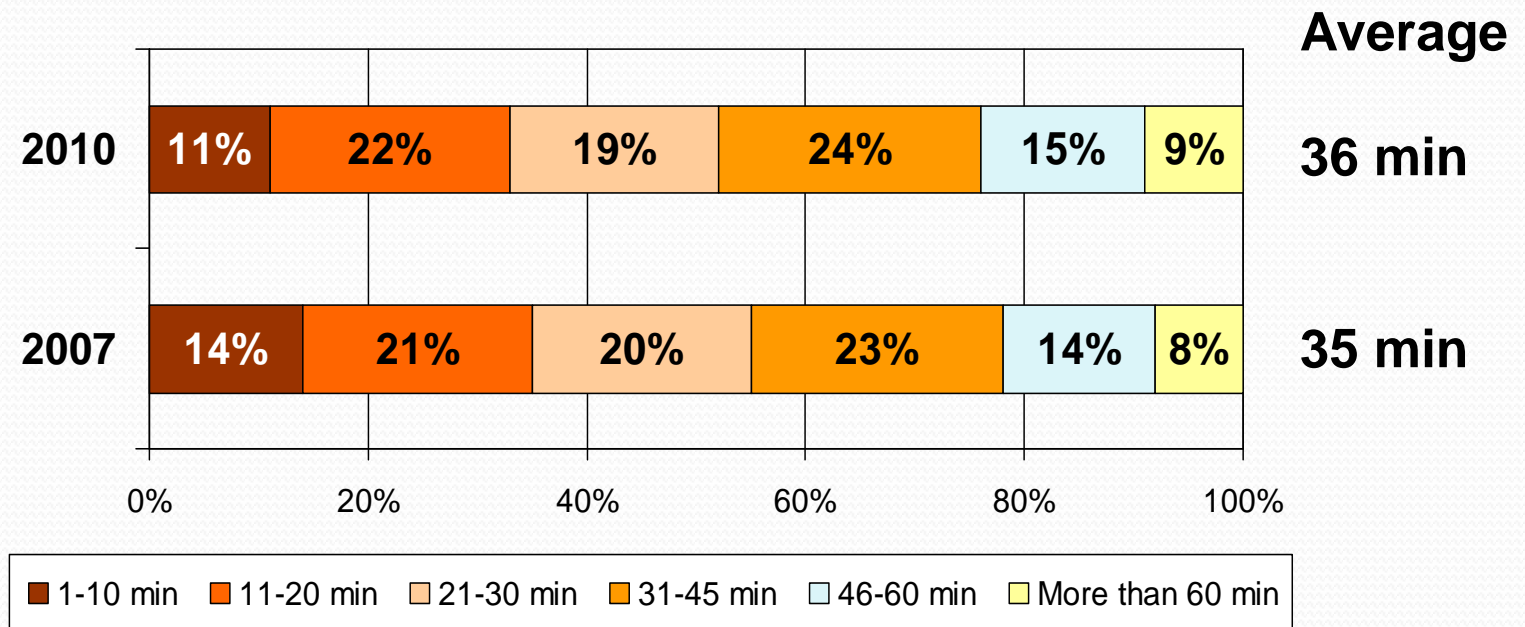
2010 SOC
n = 5,533

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 about the same (36 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?

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	6%	4%
■ Telework	25%	19%
■ FT telework	2%	2%
■ Average TC frequency	1.3 d/wk	1.5 d/wk

Telework has Grown Substantially Since 2001

A quarter of regional commuters telework at least occasionally. This is more than twice the percentage who teleworked in 2001.

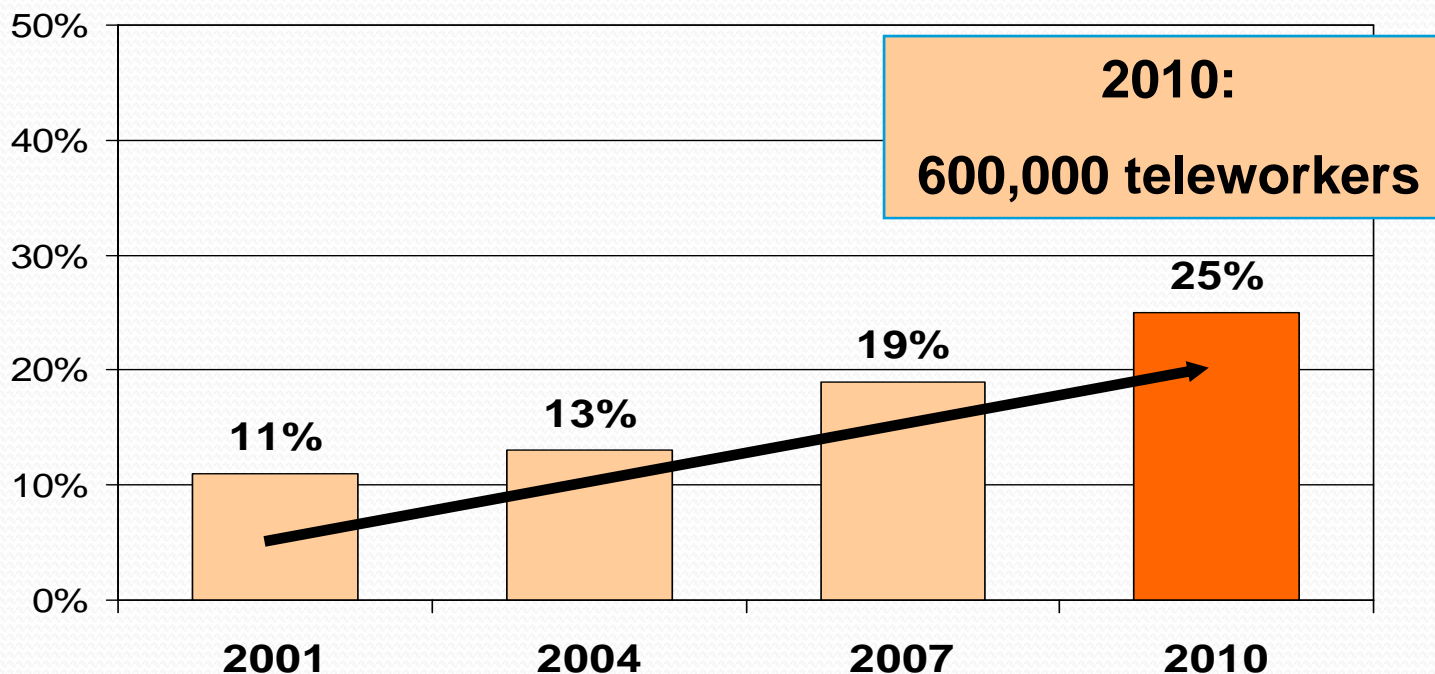
2001 SOC
N = 6,924

2004 SOC
N = 6,851

2007 SOC
n = 6,168

2010 SOC
n = 6,050

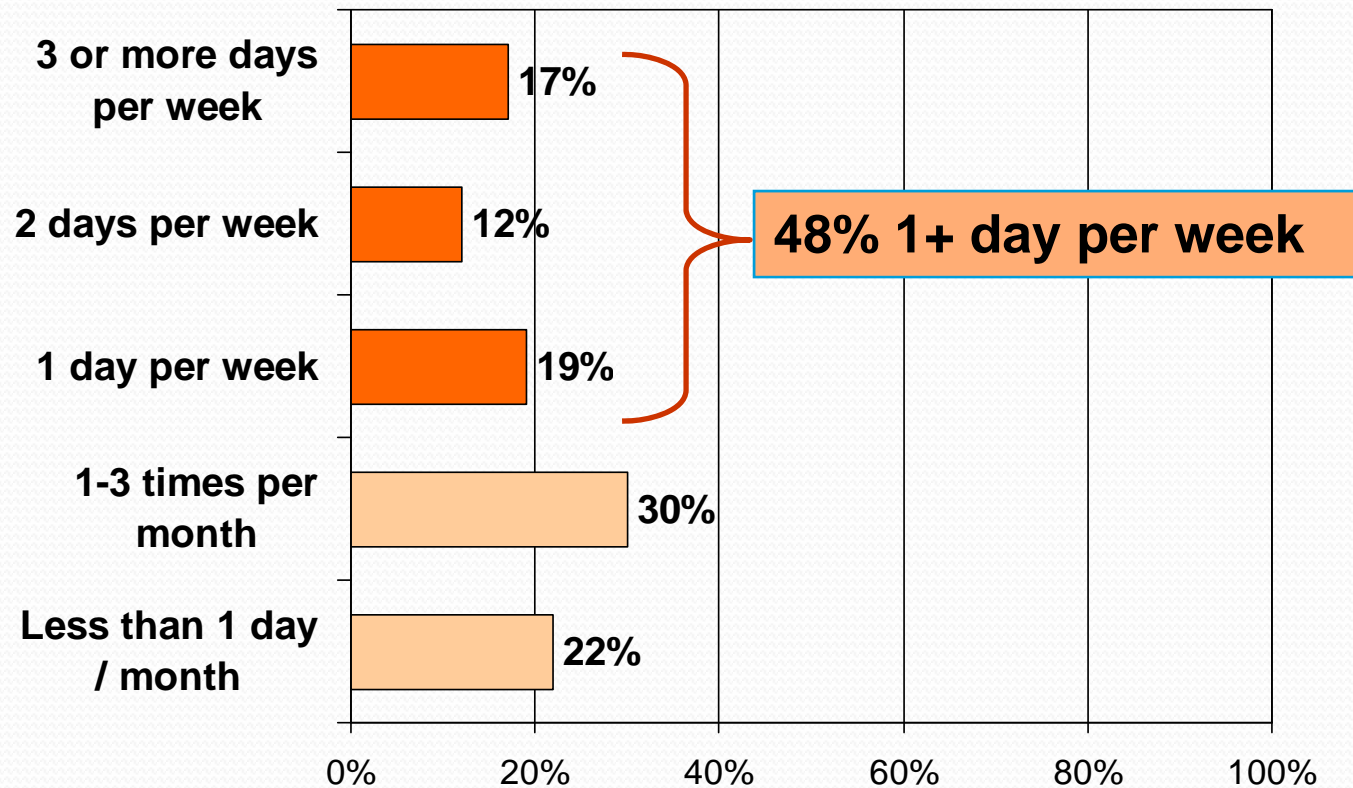
Excludes
workers who
are self-
employed and
work only at
home



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 1.3 days per week



n = 1,529

Q14 How often do you usually telecommute?

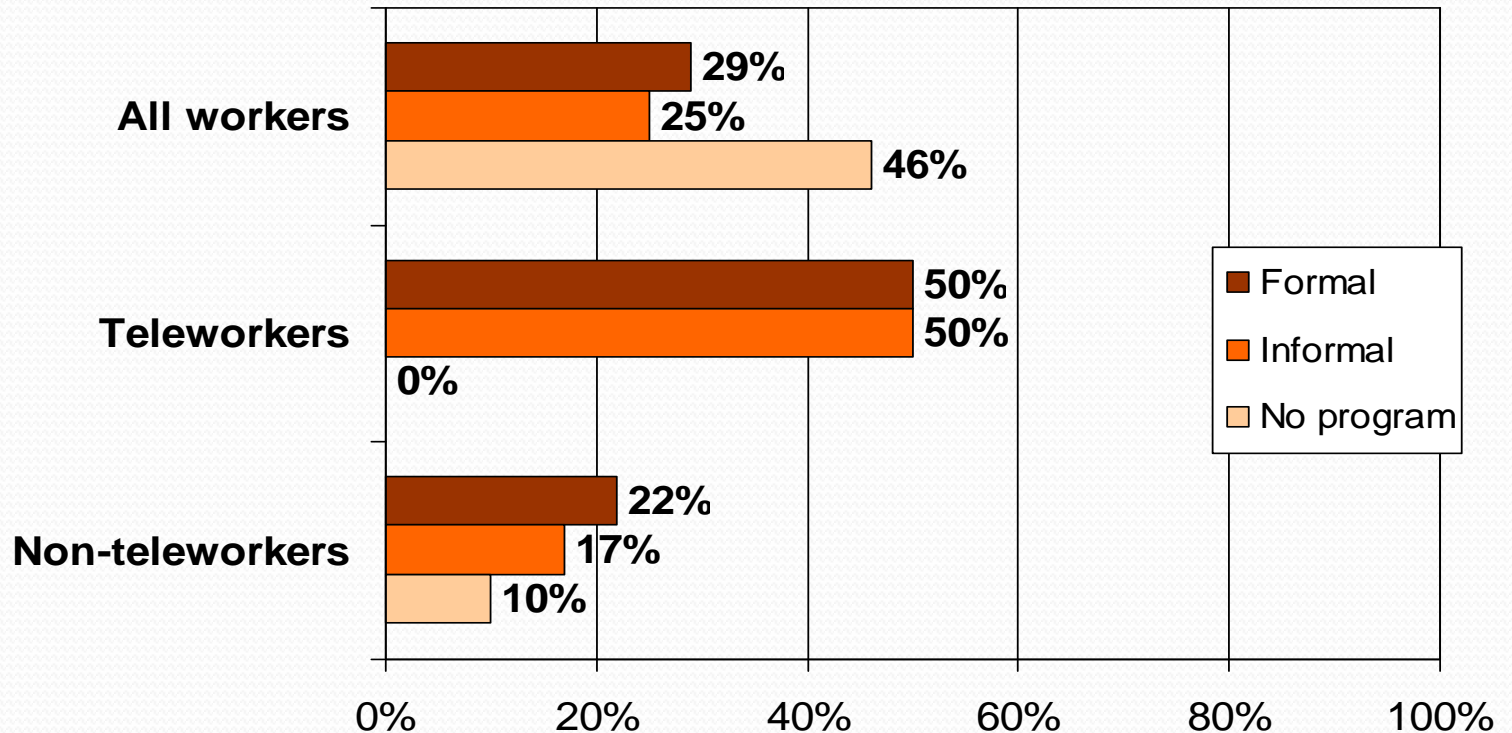
Three in Ten Workers Said Their Employer has a Formal Telework Program; About Half Said the Employer Does not Allow Telework

But half of Teleworkers Telework Under a Formal Program

All workers
n = 5,854

Teleworkers
n = 1,488

Non-teleworkers
n = 4,366

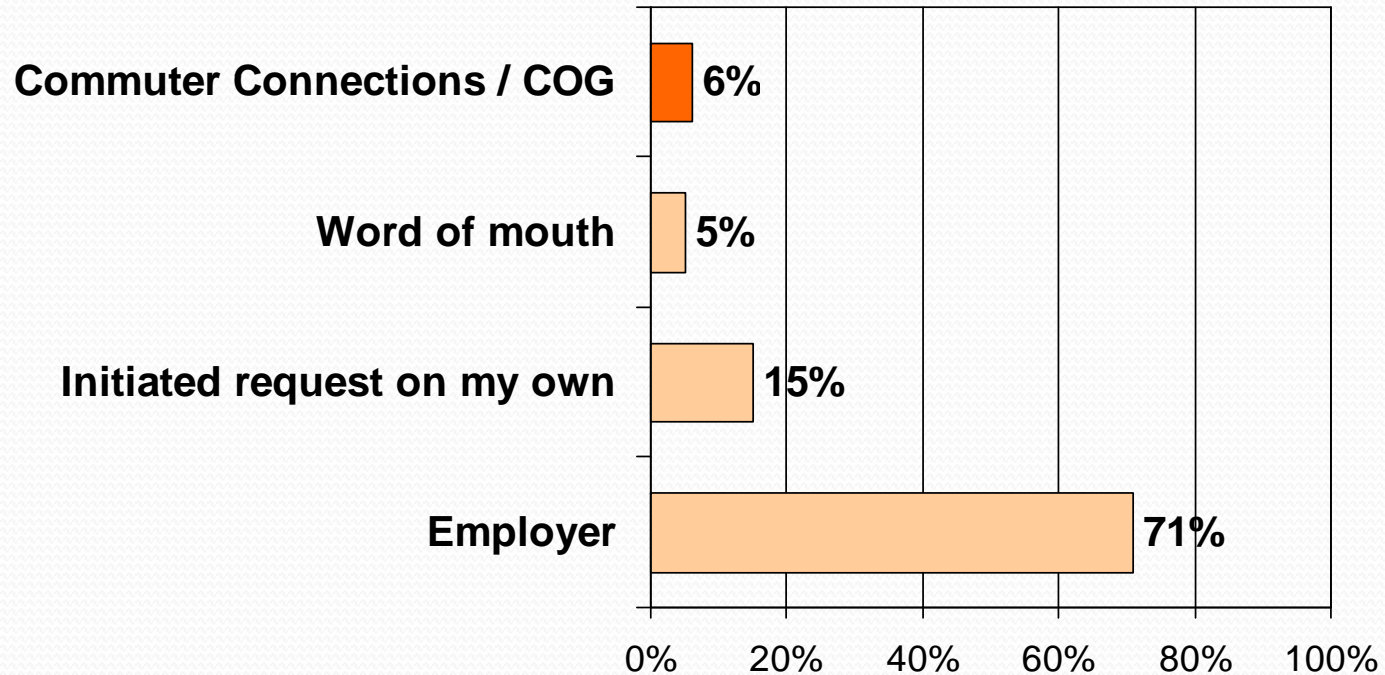


Q13a Does your employer have a formal telecommuting program at your workplace or do you telecommute under an informal arrangement between you and your supervisor?

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



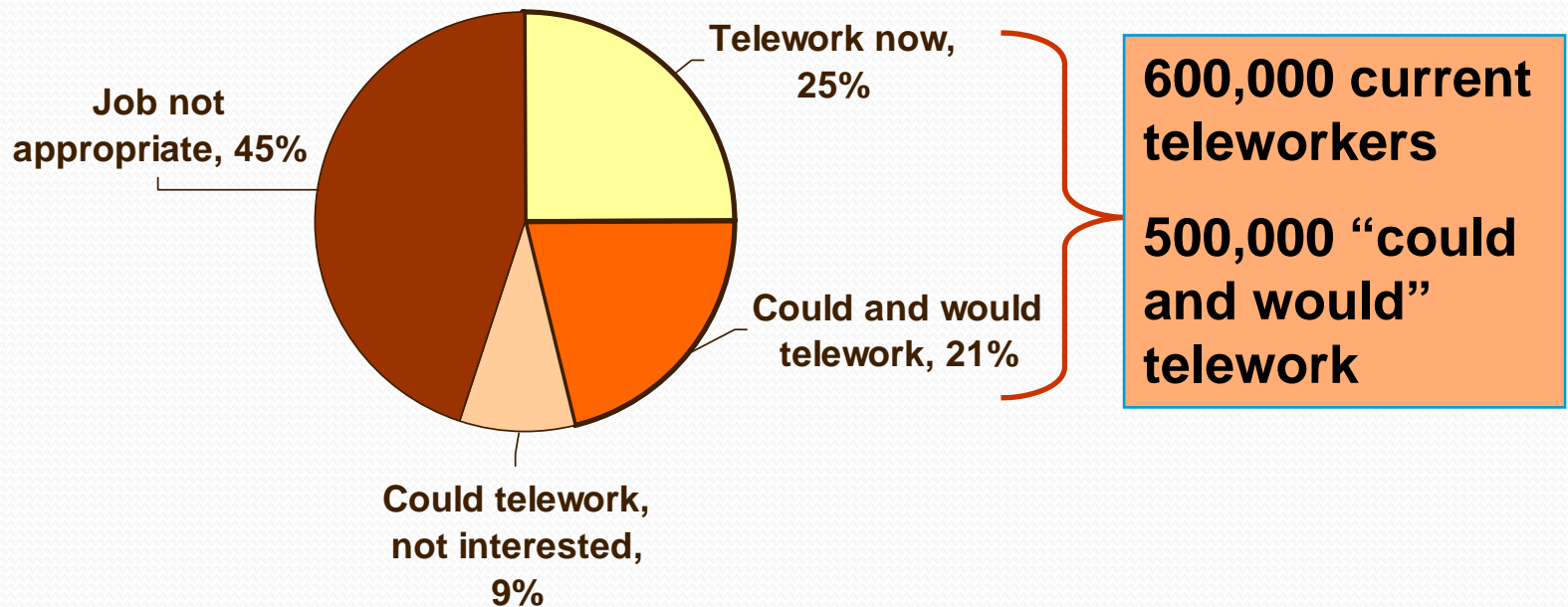
Teleworkers
n = 1,493

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 500,000 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.”



n = 6,192

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

14f Would you be interested in telecommuting on an occasional or regular basis?

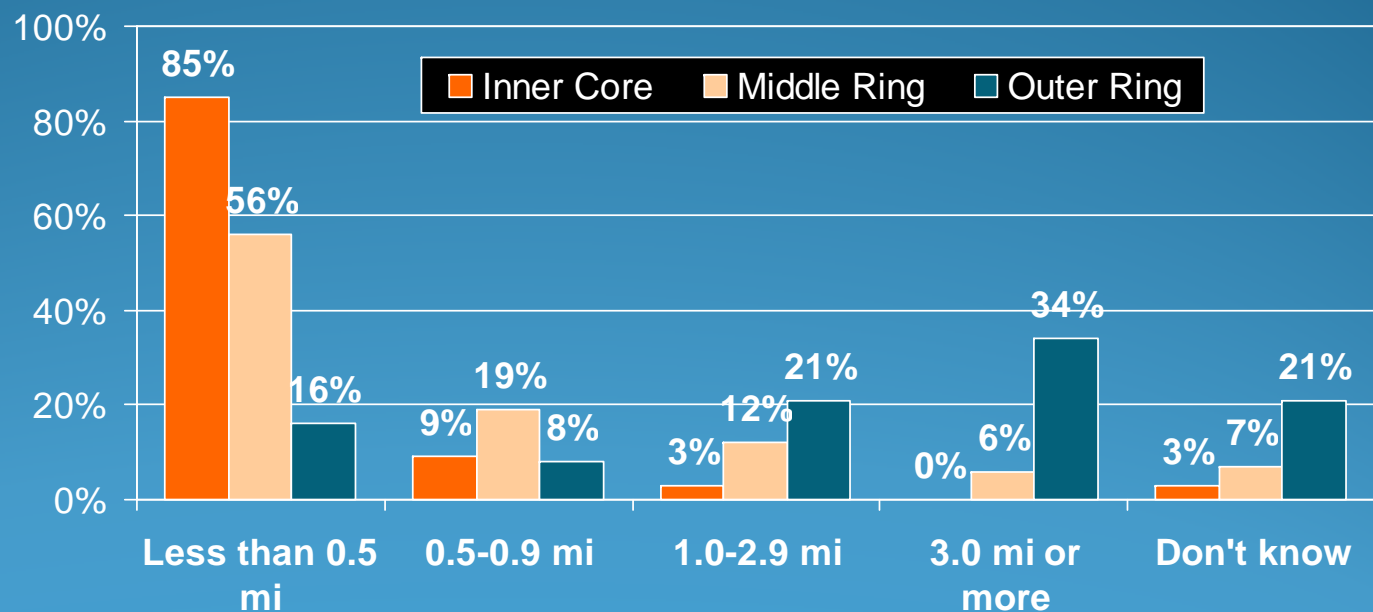
Bus and Train Access By Area of Region

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?

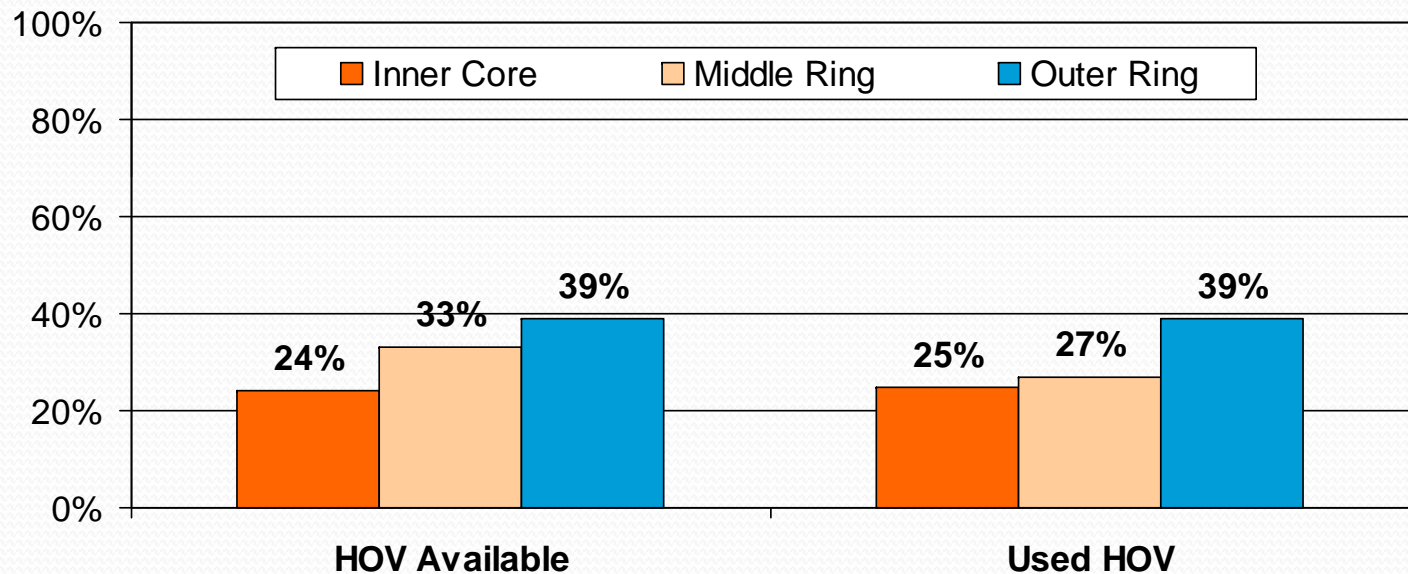
Q44b How far from your home is the nearest train station?

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?

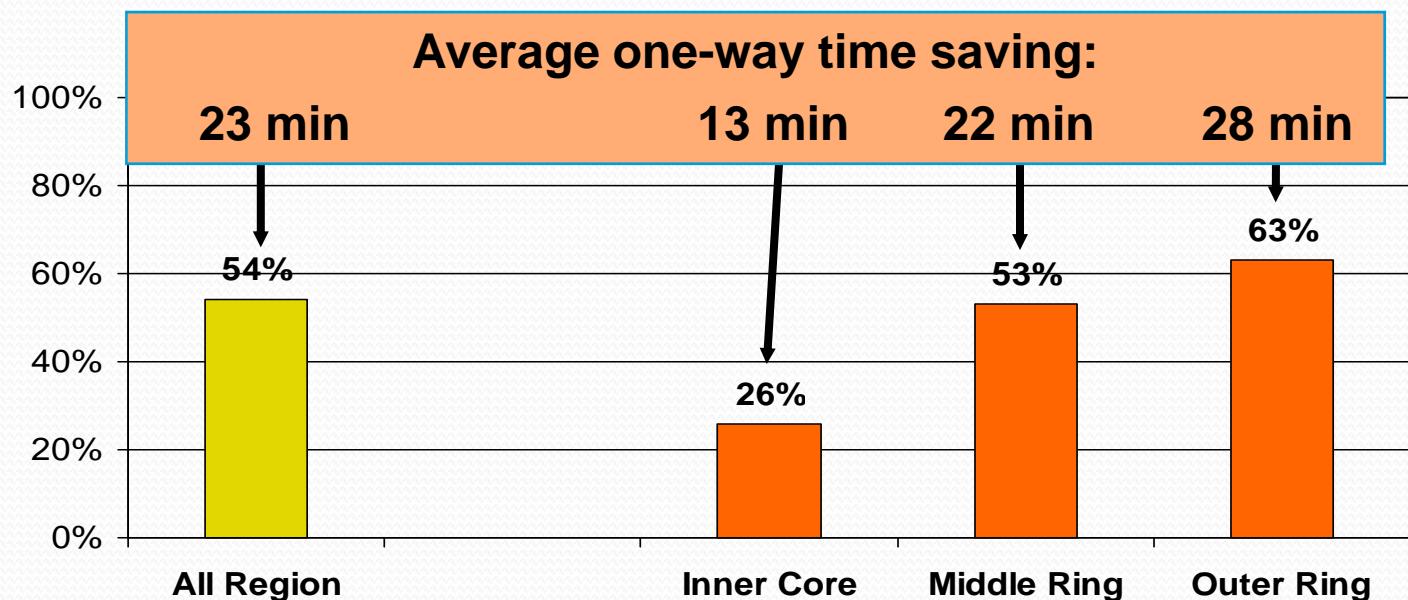
Q47 Do you ever use the HOV lane to get to or from work?

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

More than half of HOV users who lived in the Middle Ring and 63% who lived in the Outer Ring said HOV lanes influenced their decision to use alternative modes. These commuters had greater time savings from HOV lanes than did Core residents.

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

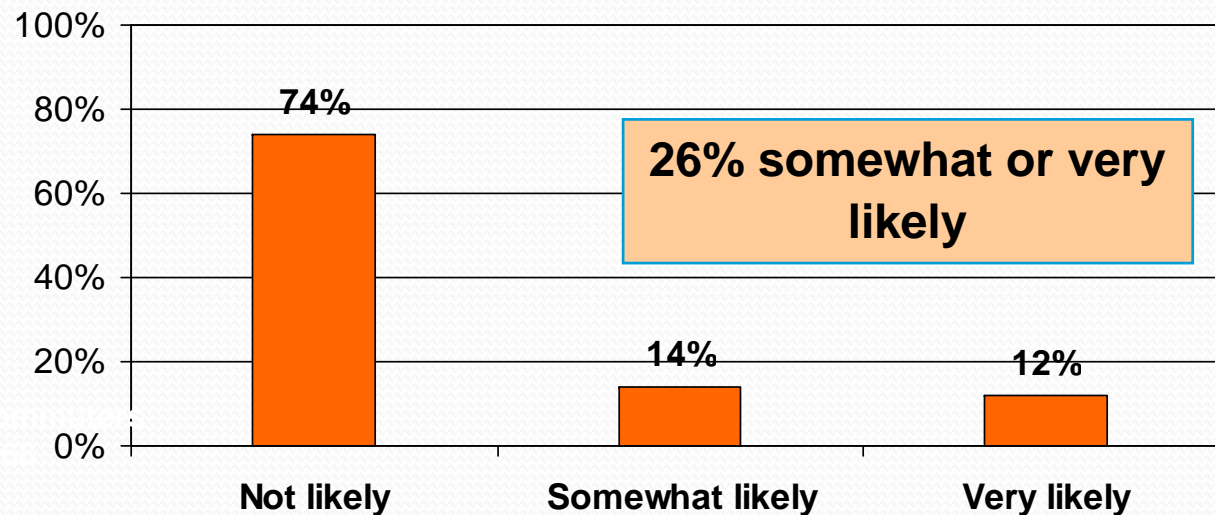
HOV lane time saving
Core
 n = 103
Middle Ring
 n = 121
Outer Ring
 n = 262



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?

26% 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.

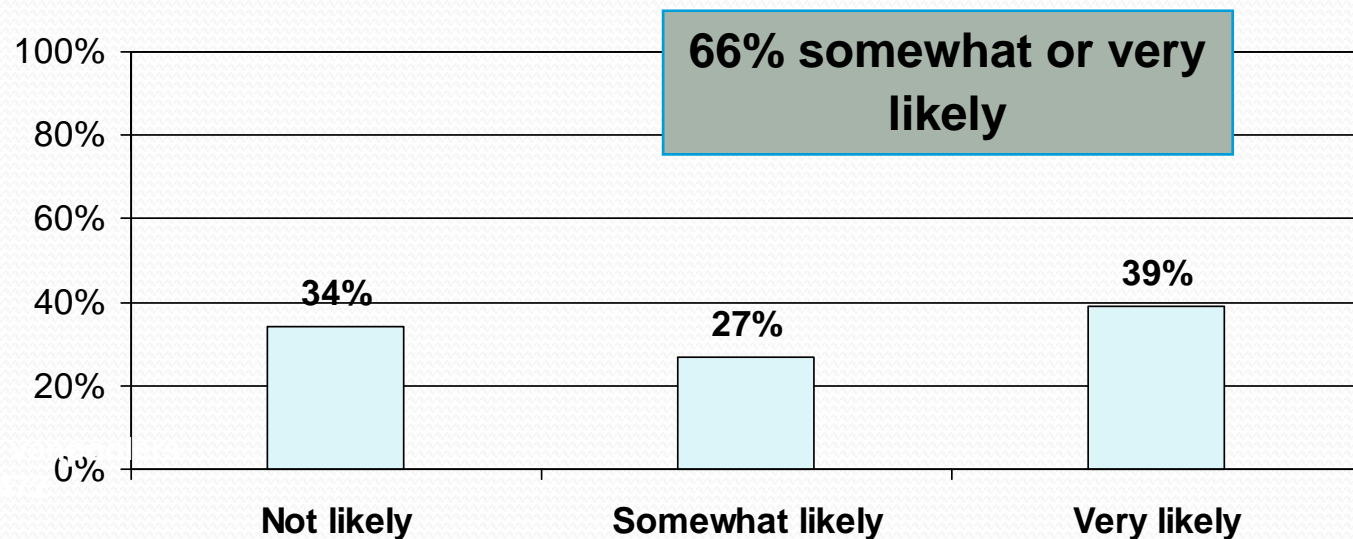


Drive alone
commuters
n = 5,368

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?

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.



**Carpoolers /
vanpoolers
n = 472**

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?

Personal / Social Benefits of Rideshare

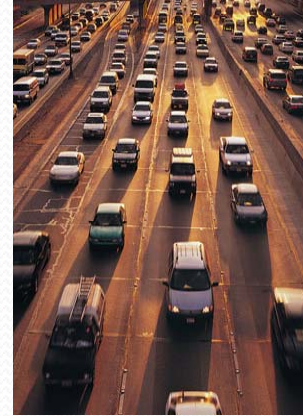
- What personal benefits do you believe people receive from using [carpool, vanpool, bus, or train]?
- What impact or benefits does a community or region receive when people use these types of transportation?



Personal health



Economics



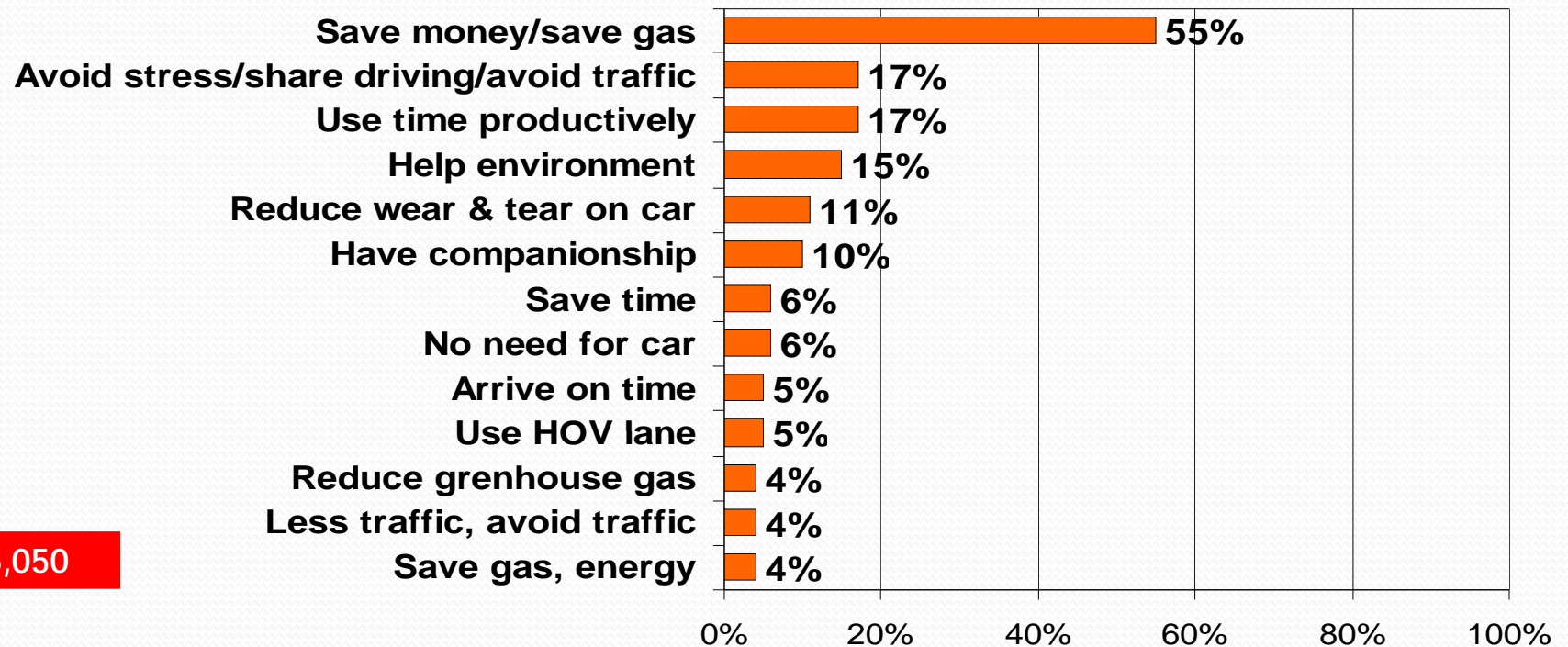
Congestion



Sustainability

90% of Respondents Cited Personal Benefits of Ridesharing

More than half of residents say people who rideshare receive a cost saving benefit and 23% note the benefit of helping the environment or saving energy.

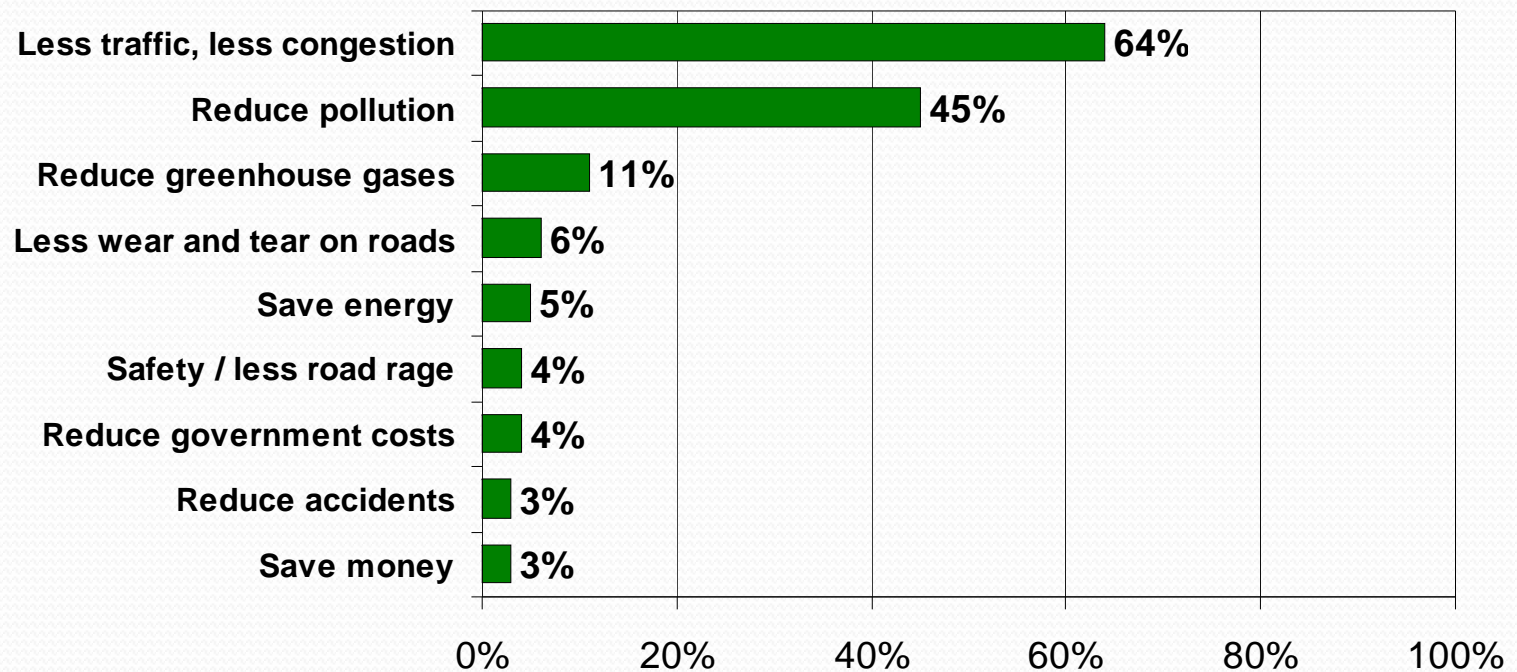


n = 6,050

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

Residents also Cite Societal Benefits from Ridesharing

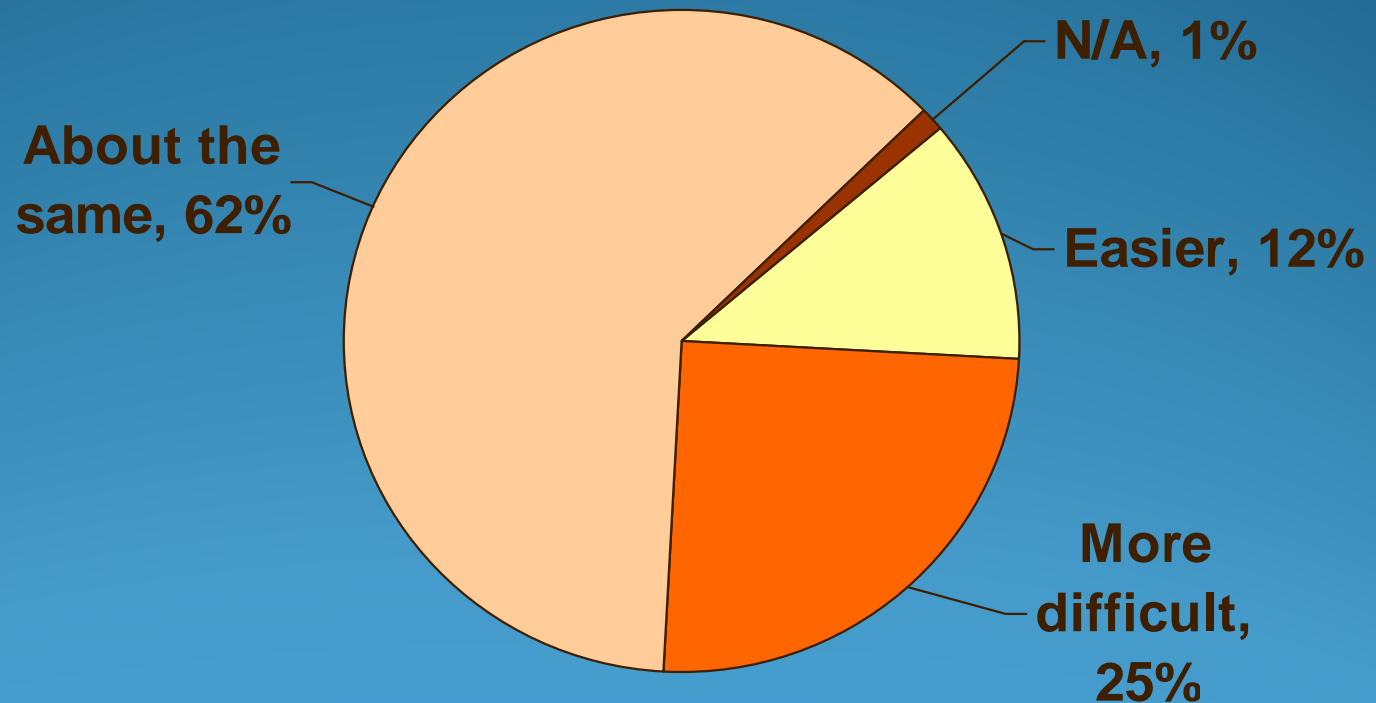
Nearly two-thirds (64%) of respondents said that use of alternative modes could reduce traffic or congestion and 56% said it could reduce pollution or reduce greenhouse gases.



n = 6,050

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

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

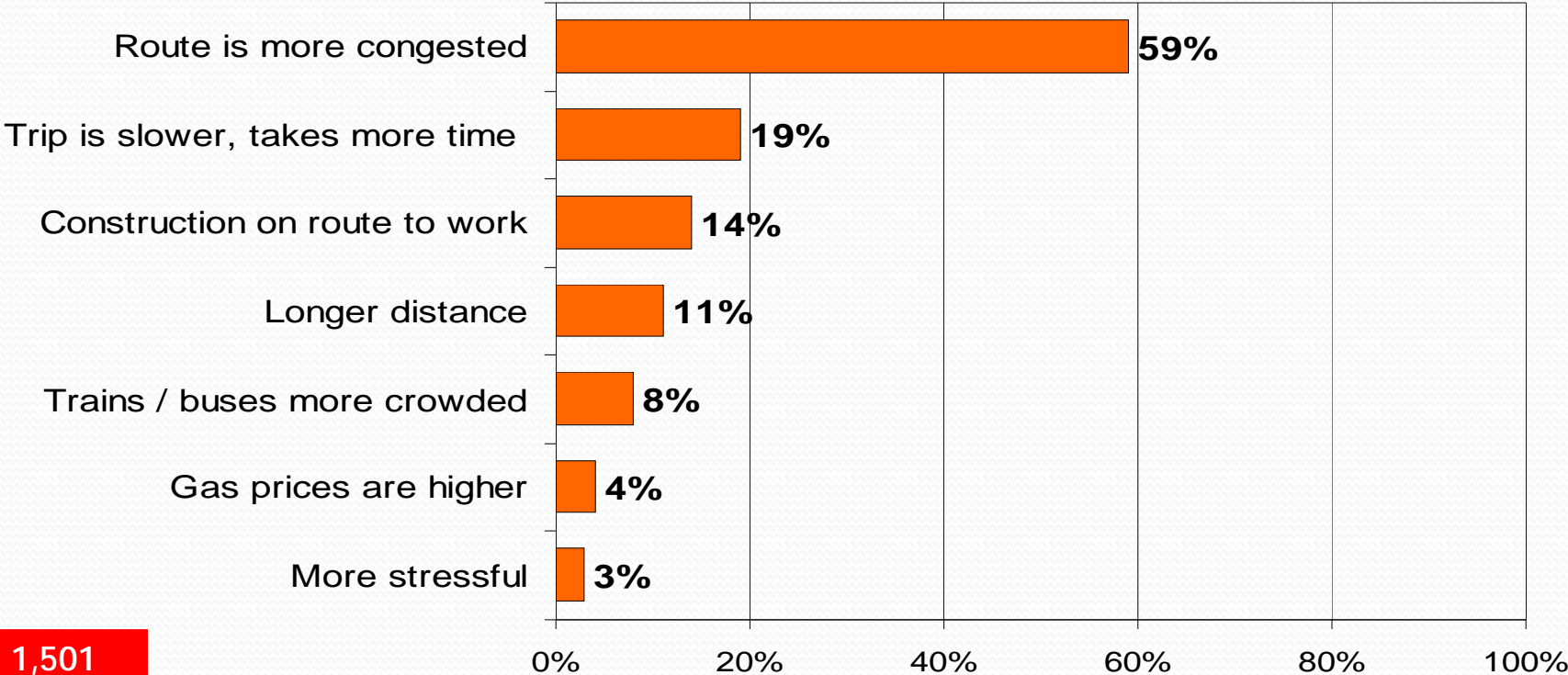


n = 6,049

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

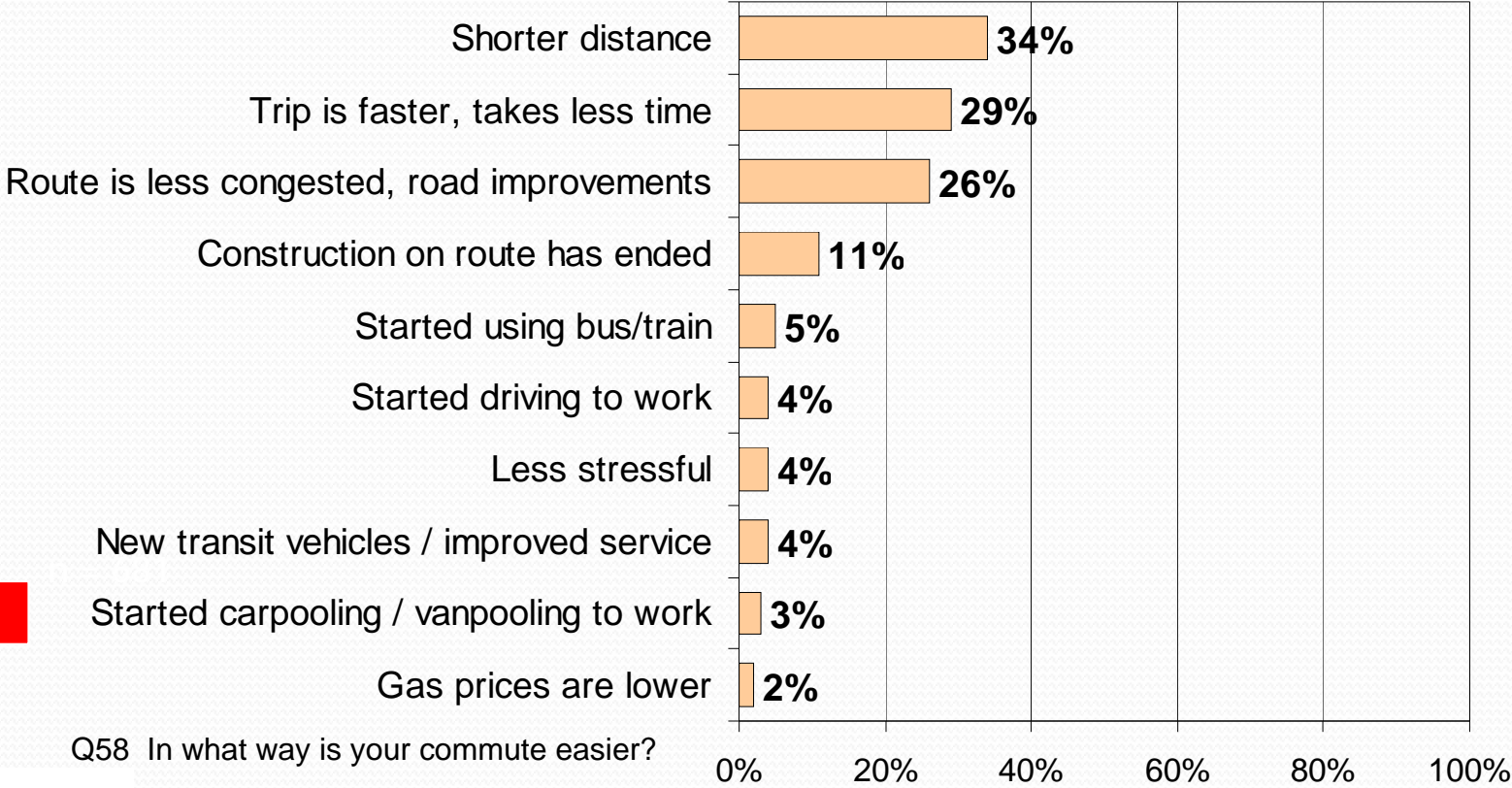


n = 1,501

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

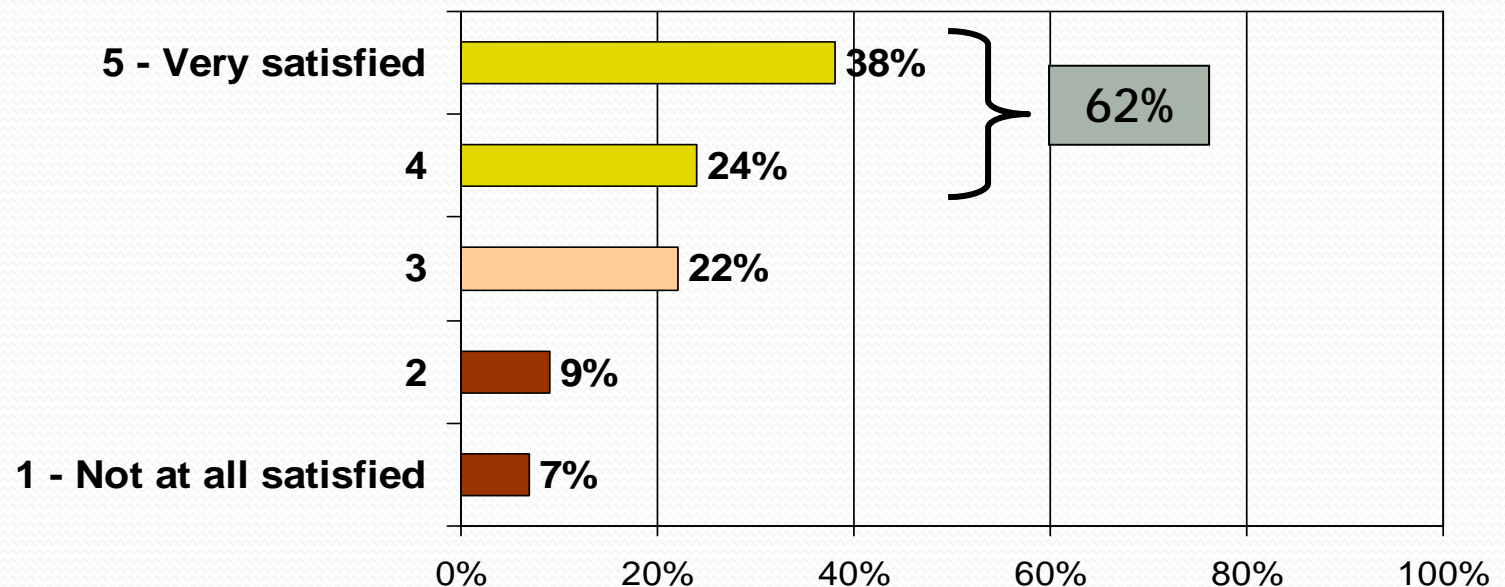


n = 681

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. 76% of respondents who had an easier commute than last year and 71% who said their commute had not changed were satisfied with their commute, compared to only 36% who said their commute had become more difficult.

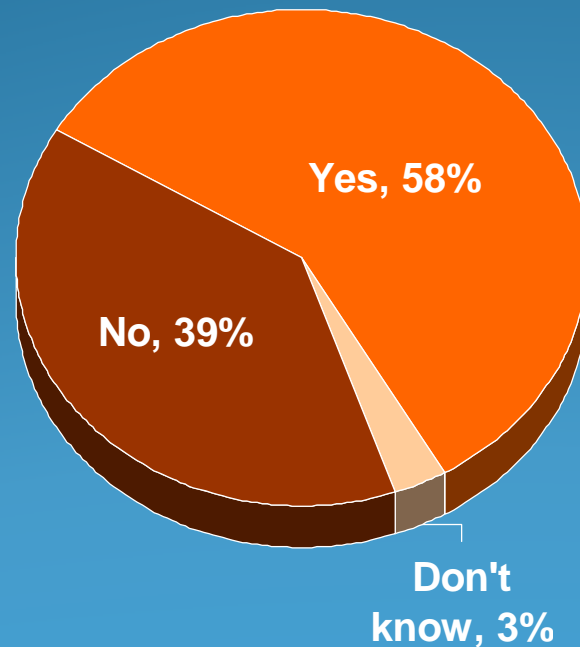


n = 6,033

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

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



45% who recalled ads could name the sponsor:

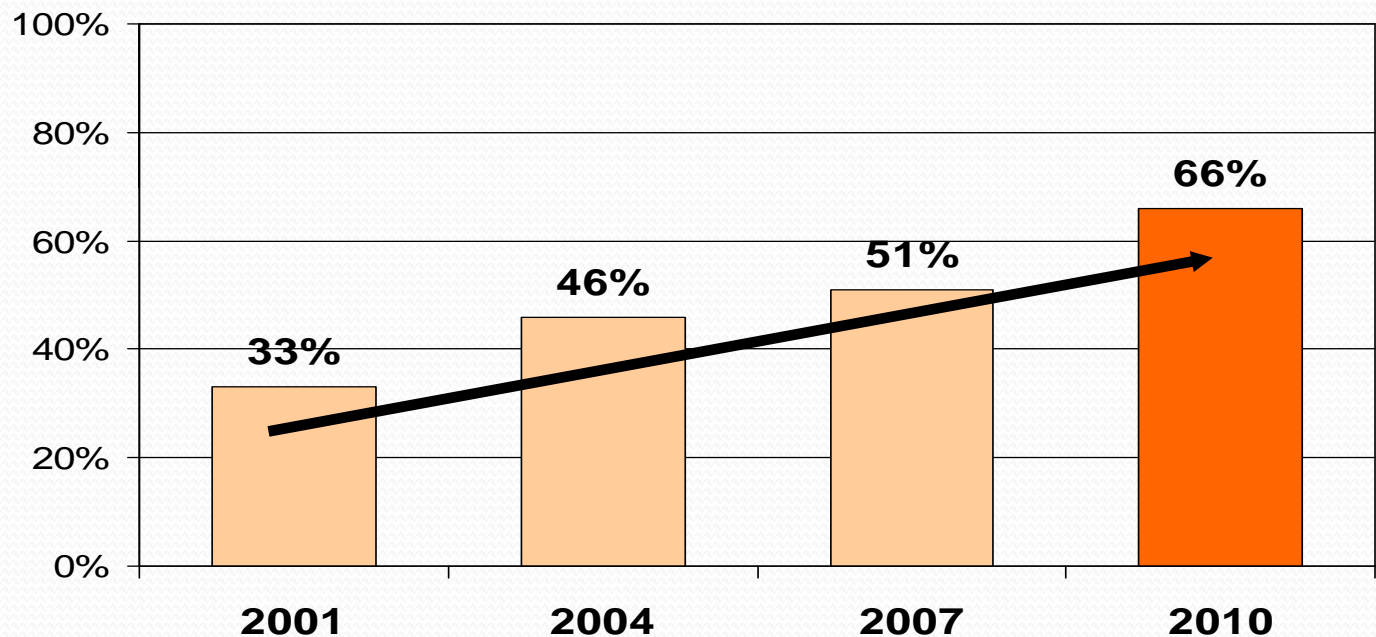
- 20% named WMATA
- 13% named Commuter Connections or COG

n = 6,033

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

Awareness of Regional Commute Information Resources has Grown Since 2001

In 2010, 66% 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

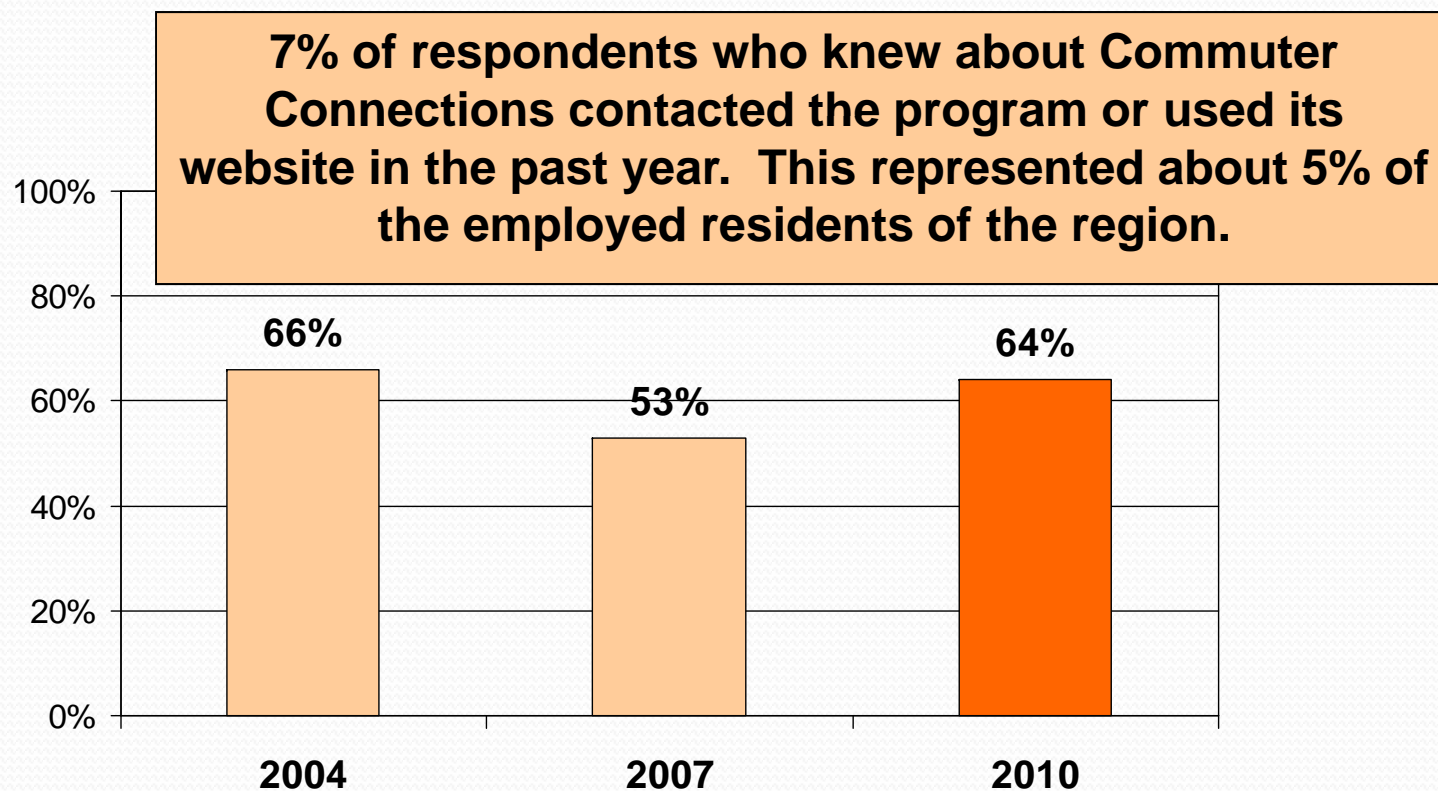
2007 SOC
n = 6,600

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 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

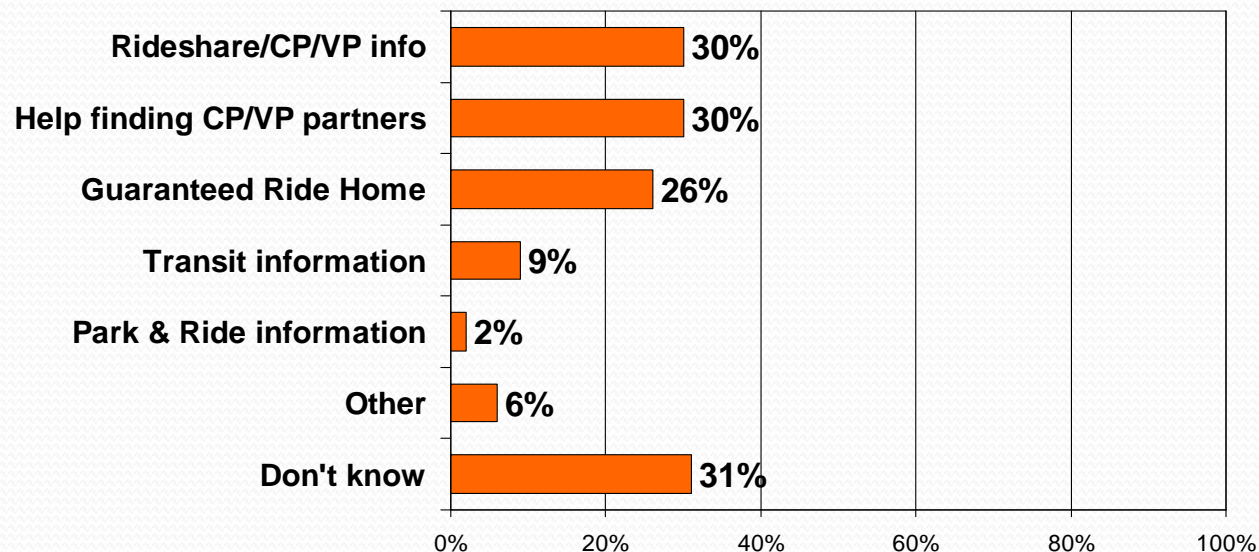
2007 SOC
n = 6,600

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.



n = 4,373

Access to Employer Commute Services

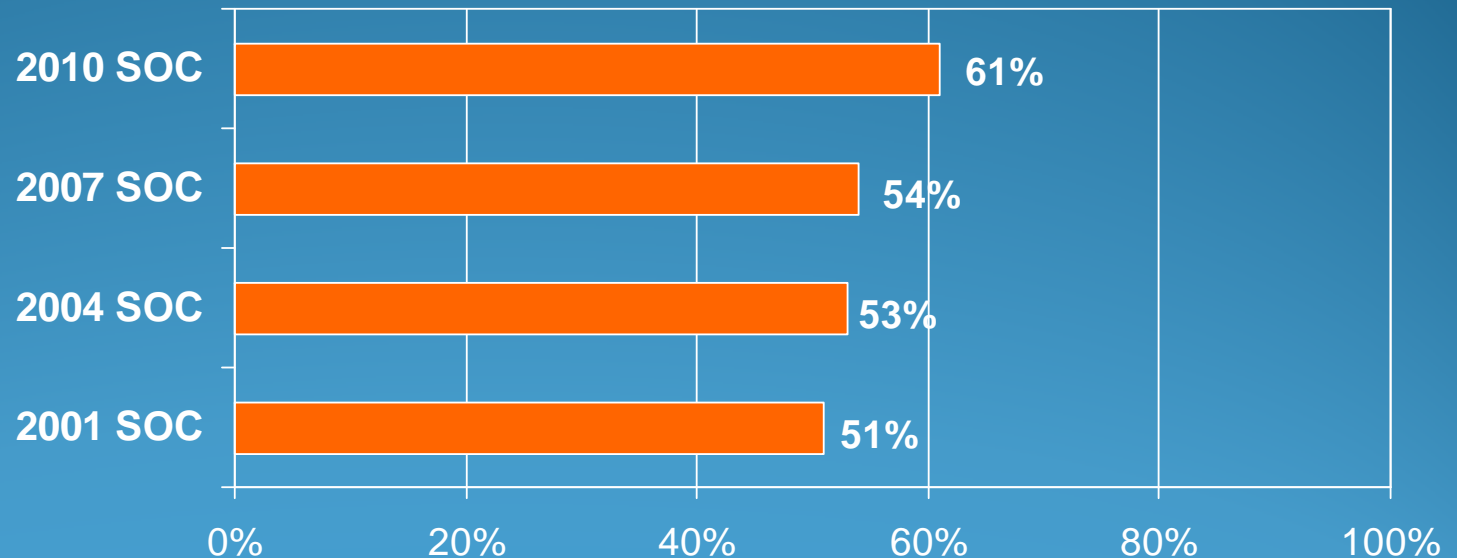
-Six in ten respondents (61%) who traveled to a worksite away from home said their employers offered one or more alternative mode incentive or support services to employees at their worksites. This was slightly higher than the 54% who noted having worksite services in 2007.

2010 SOC
n = 5,899

2007 SOC
n = 6,071

2004 SOC
n =

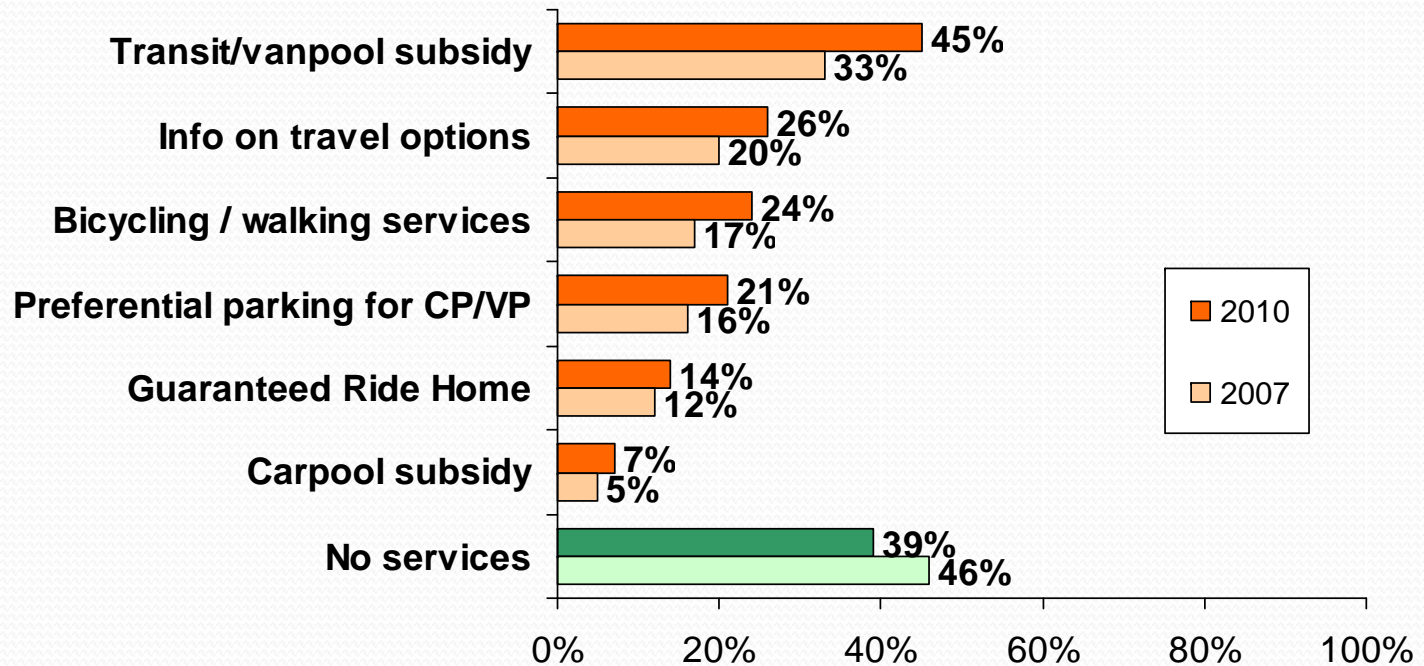
2001 SOC
n =



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 45% of respondents. About a quarter had access to commute option information (26%), services for bicyclists and walkers (24%), 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.... ,?

Next Steps

- Review of Technical Report/Comment Period
- Finalize Technical Report in FY 2011
- Prepare and Publish General Public Report in 2011

Questions?

Nicholas Ramfos

202-962-3313

nramfos@mwcog.org