



TERM Evaluation Project
2013 State of the Commute Survey
TPB Technical Committee
June 28, 2013

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 also surveyed
- 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

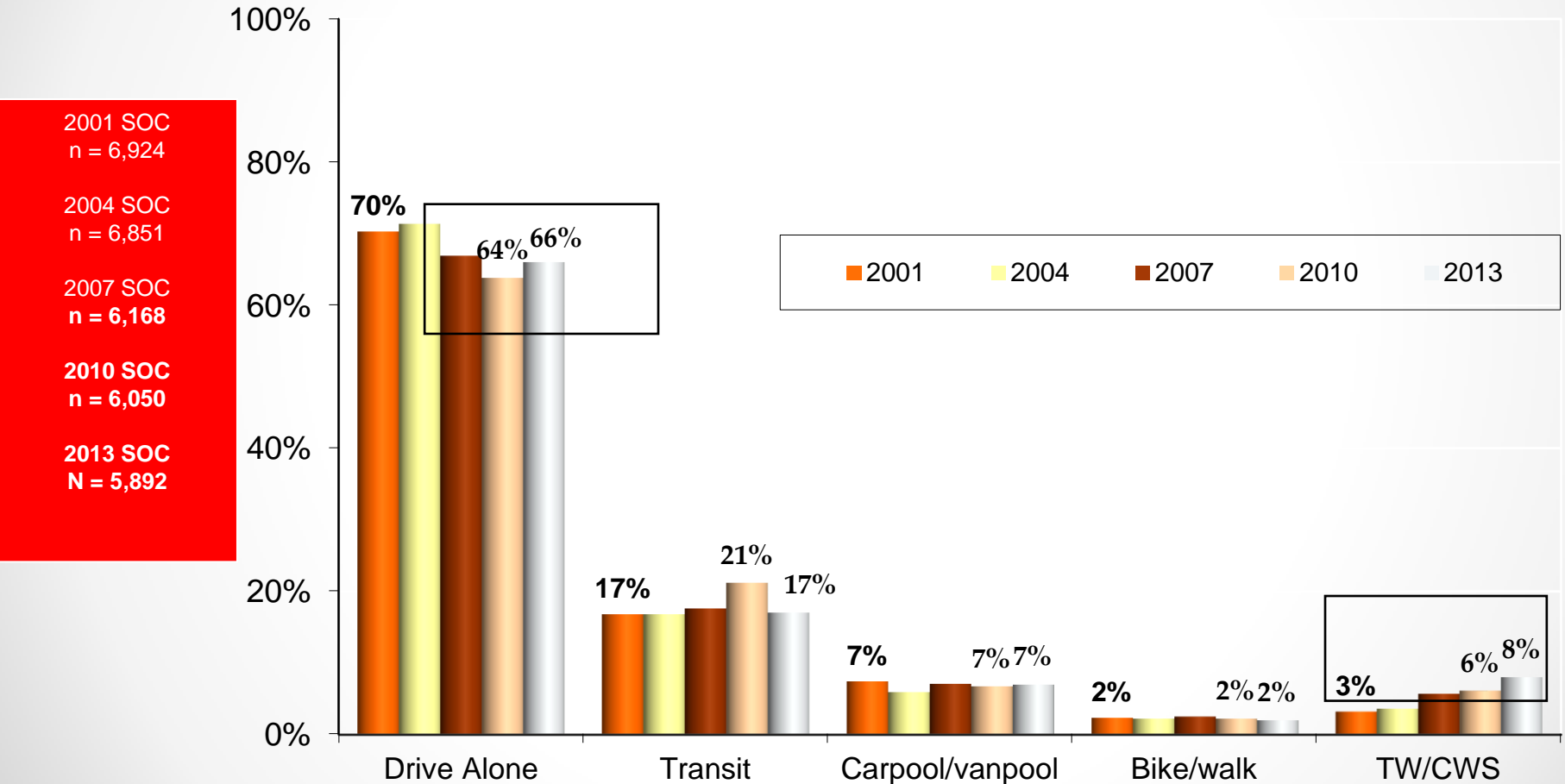
- Current and past commute patterns
- Telecommuting experience
- Awareness/access to transit, HOV, P&R
- Transportation satisfaction, benefits of alternative mode use
- Mass marketing awareness and influence
- Awareness of CC, regional and local commute services
- Employer commute assistance



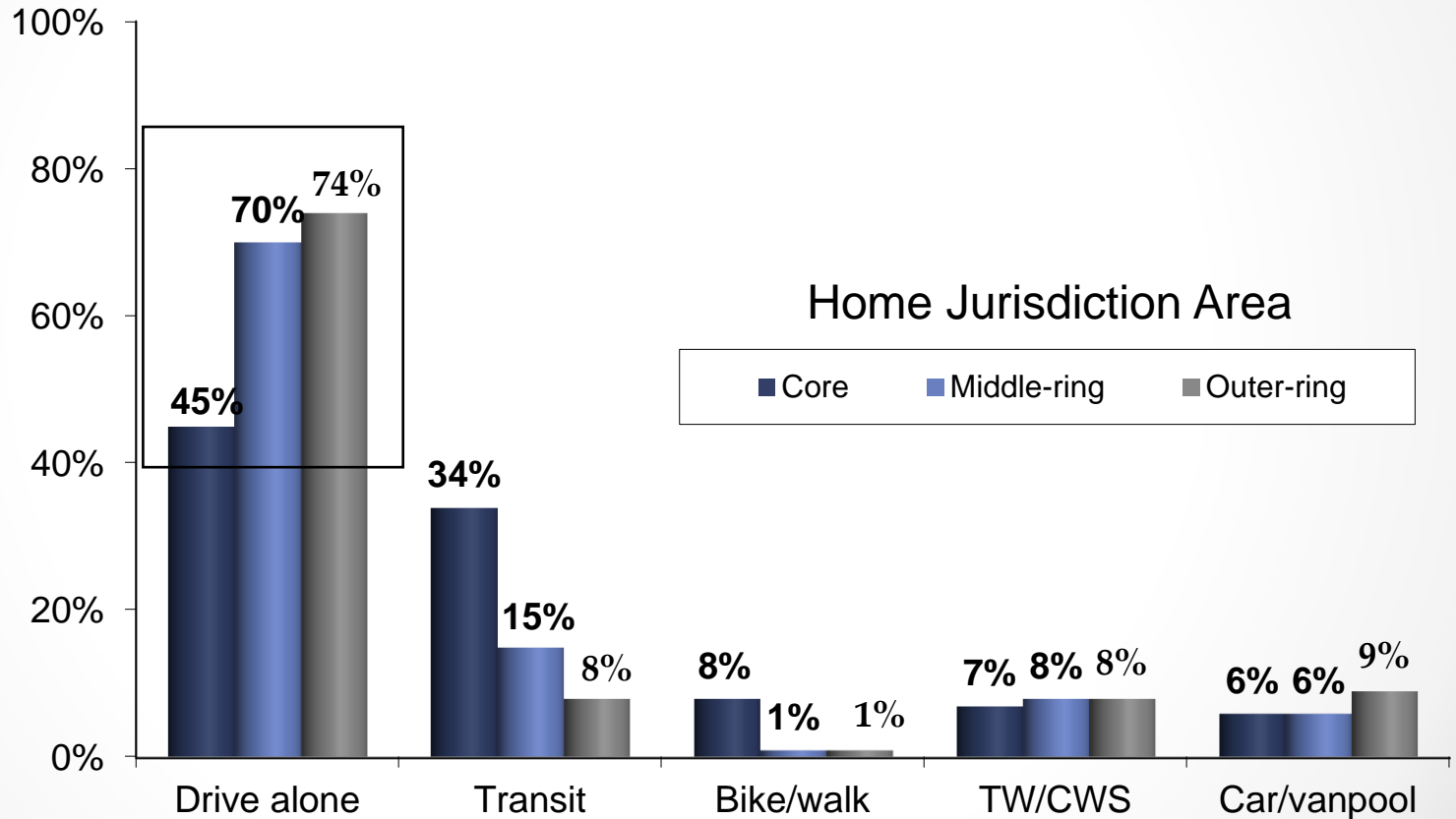
Preliminary Highlights

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

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



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

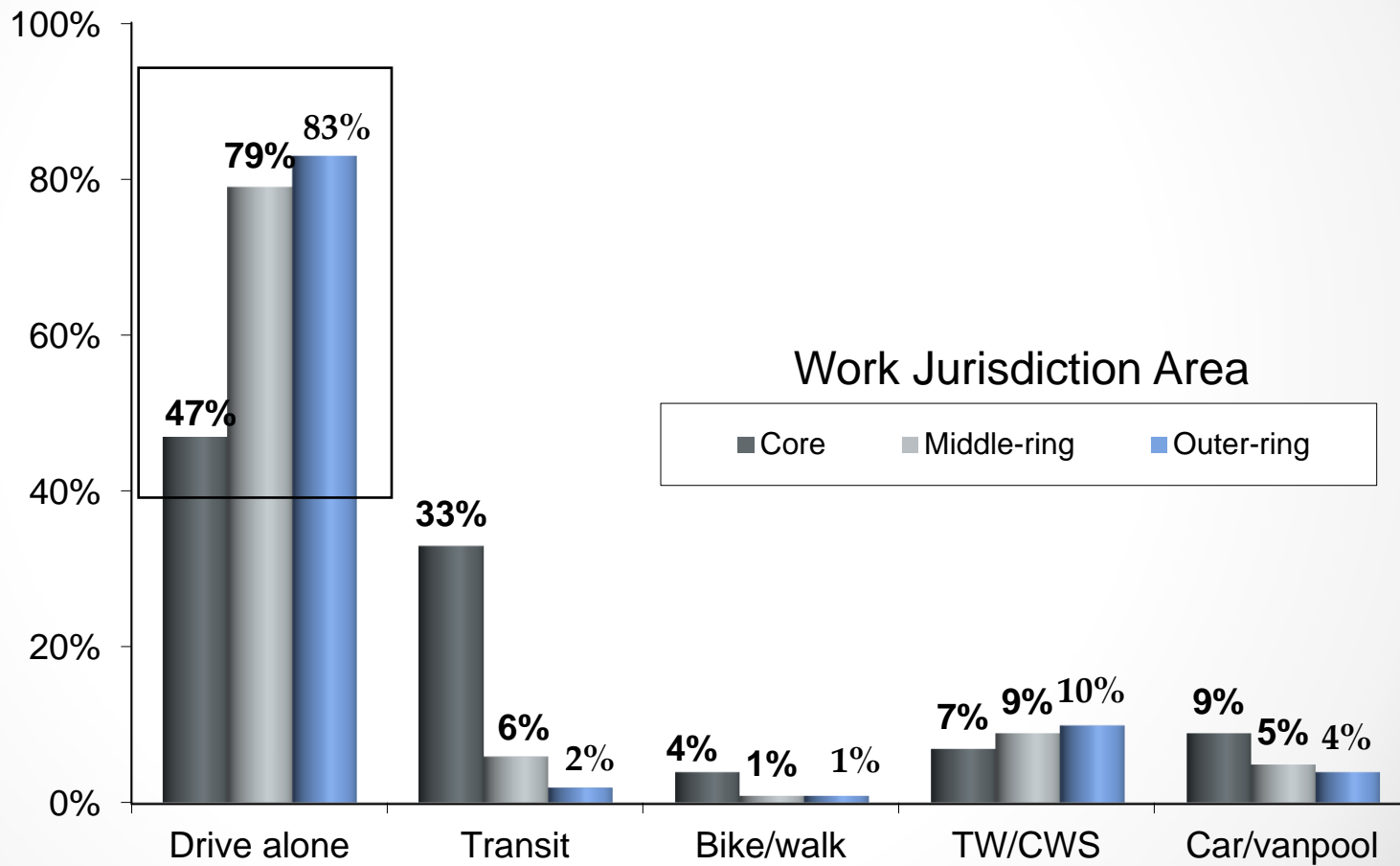
Core workers also bike/walk and carpool/vanpool at a higher rate

Work Location

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

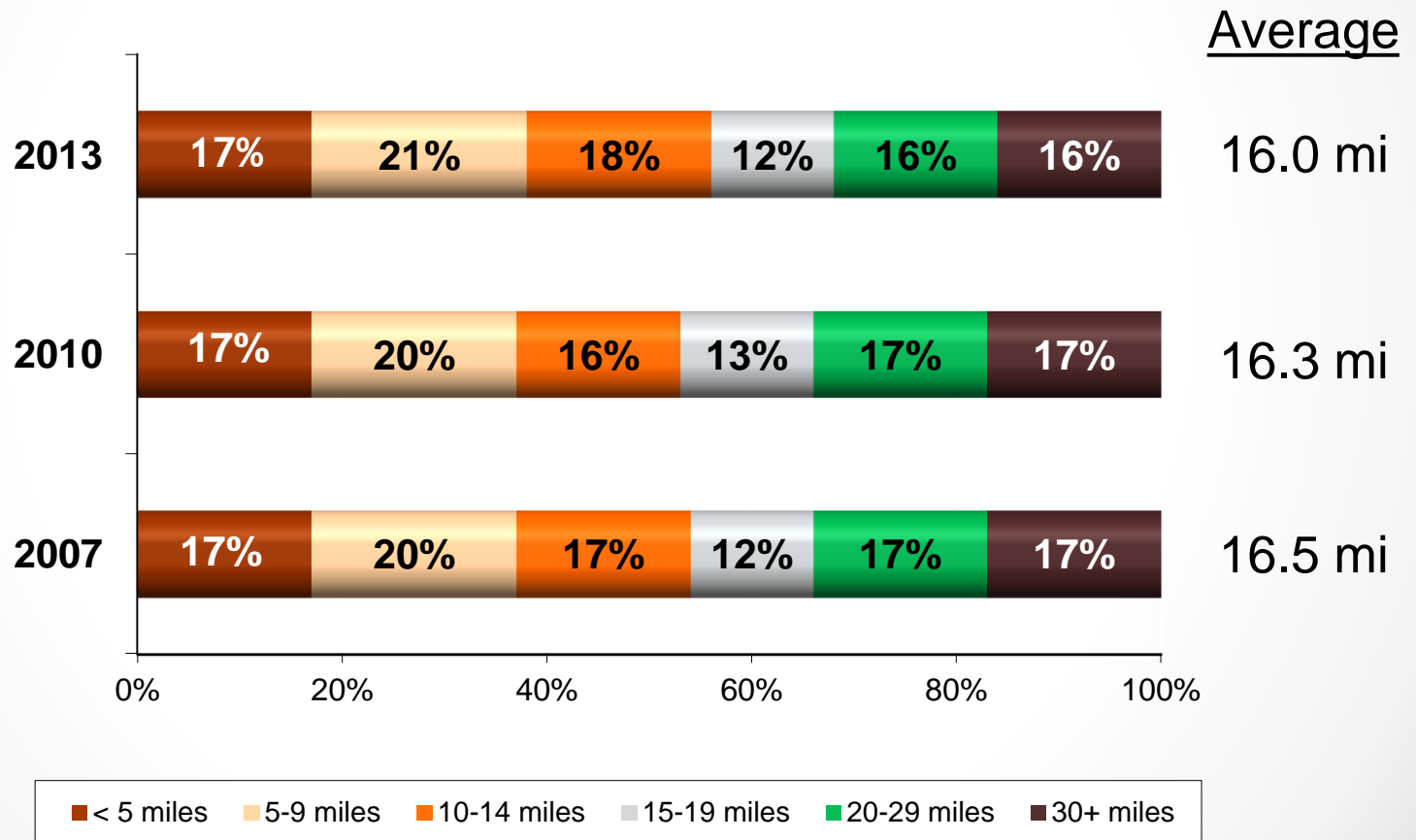
Middle Ring
(Fairfax, Montgomery, Prince George's)
n Work Location

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..

The 2013 Average Commute Distance (16.0 mi) is Less than 2010 (16.3 mi) and than 2007 (16.5 mi)
 More than a third of respondents traveled fewer than 10 miles, but 32% traveled 20 miles or more



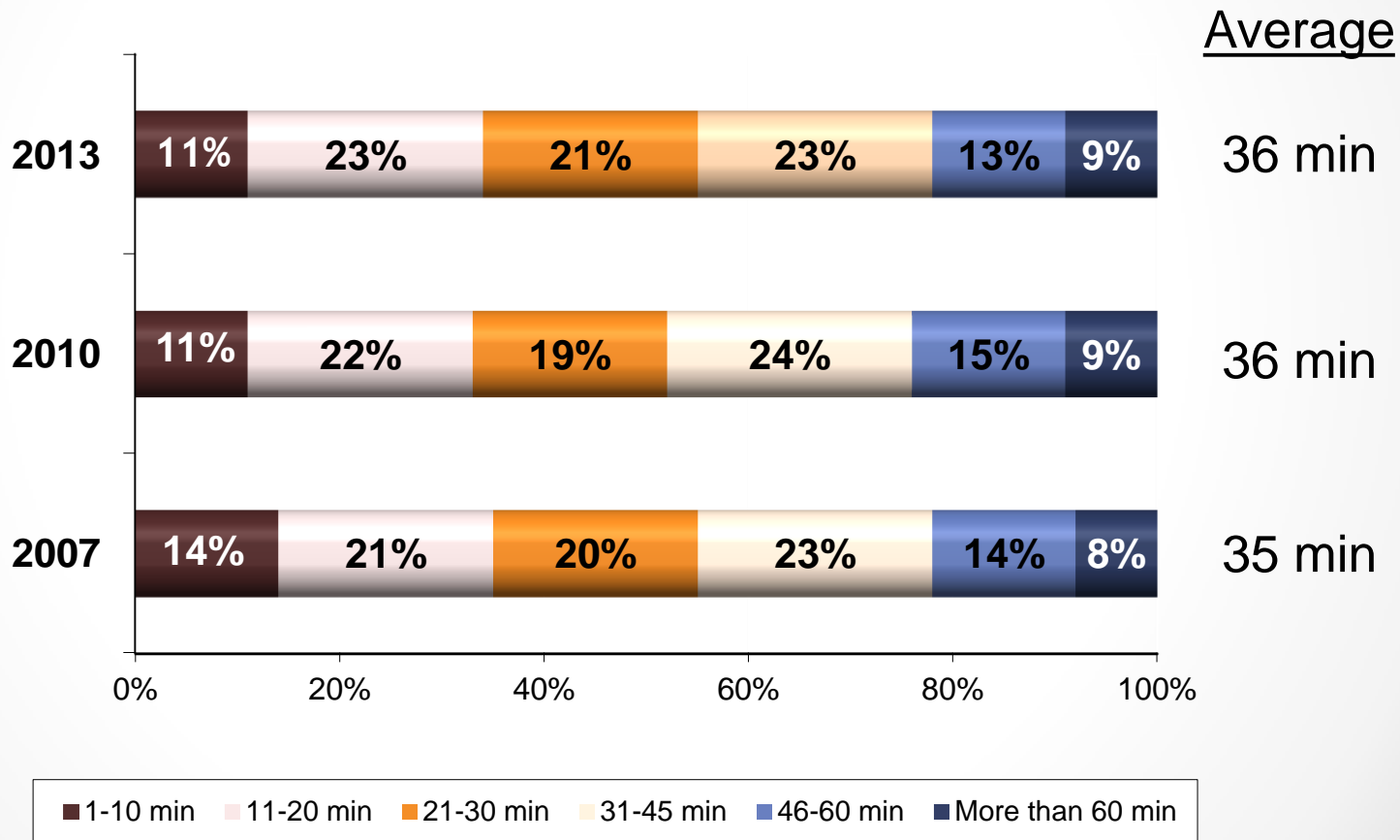
2013 SOC
 n = 5,122

2010 SOC
 n = 5,533

2007 SO 2007 C
 n = 5,465

The 2013 Average Commute Time is the Same as in 2010 and about the same as in 2007

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



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 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

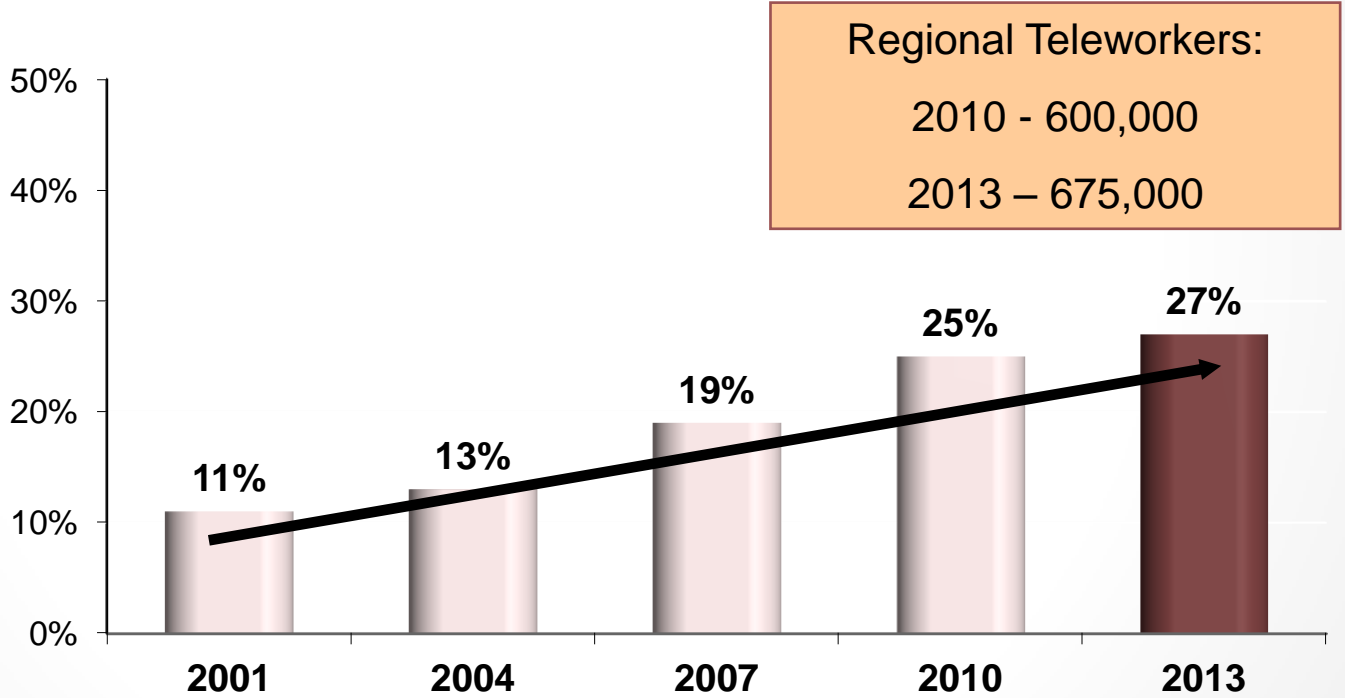
2004 SOC
n = 6,851

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

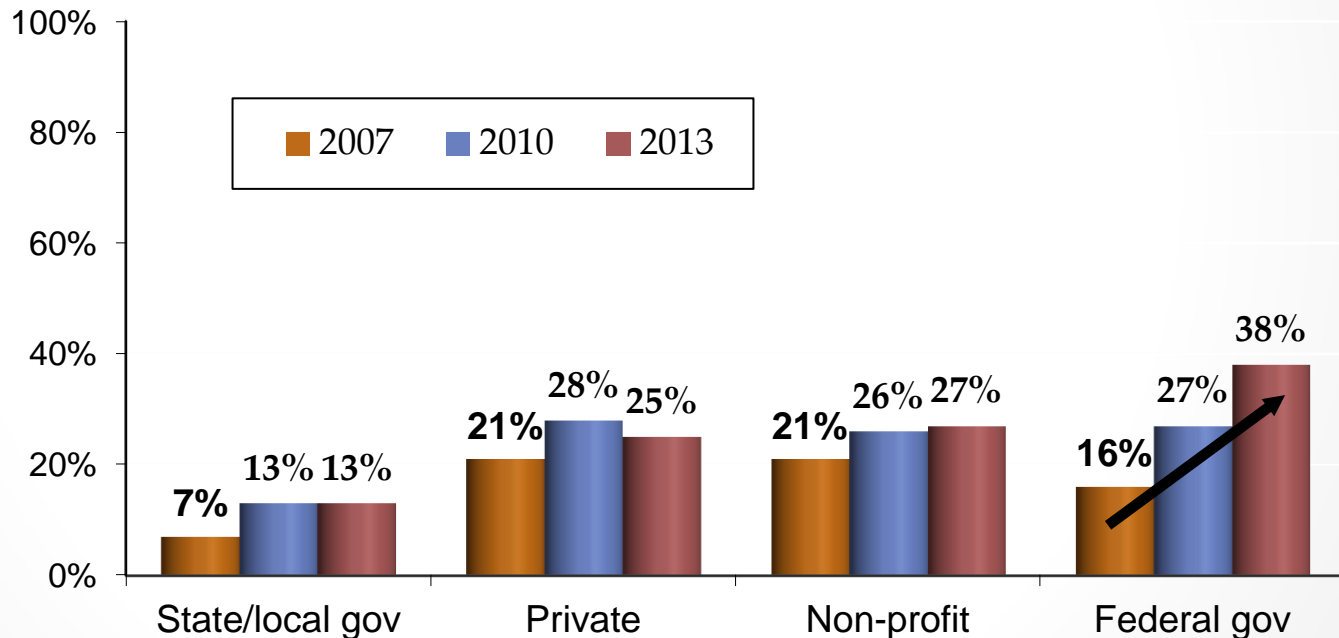
2010 SOC

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? 11

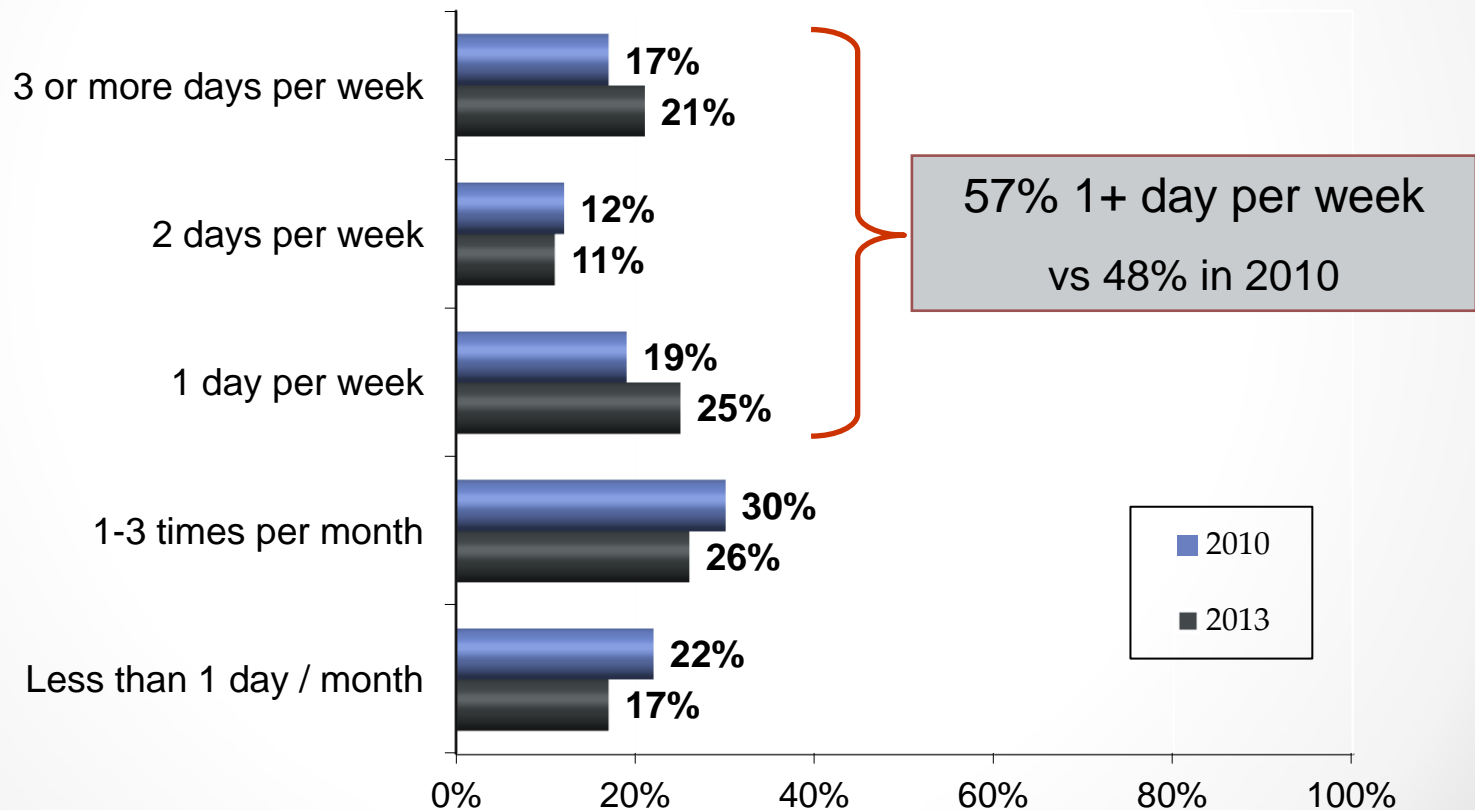
Work Schedule Arrangements in 2013 are Very Similar to 2010



	<u>2013 SOC</u>	<u>2010 SOC</u>
■ Work full-time	85%	87%
■ Self-employed	6%	6%
■ Average assigned days	4.9	4.9
■ Average travel days	4.5	4.3
■ Work compressed schedule	7%	6%
■ Telework	<u>27%</u>	25%
■ Full-time telework	3%	2%
■ Average TW frequency	<u>1.4 d/wk</u>	1.3 d/wk

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



2013
n = 1,559

2010
n = 1,529

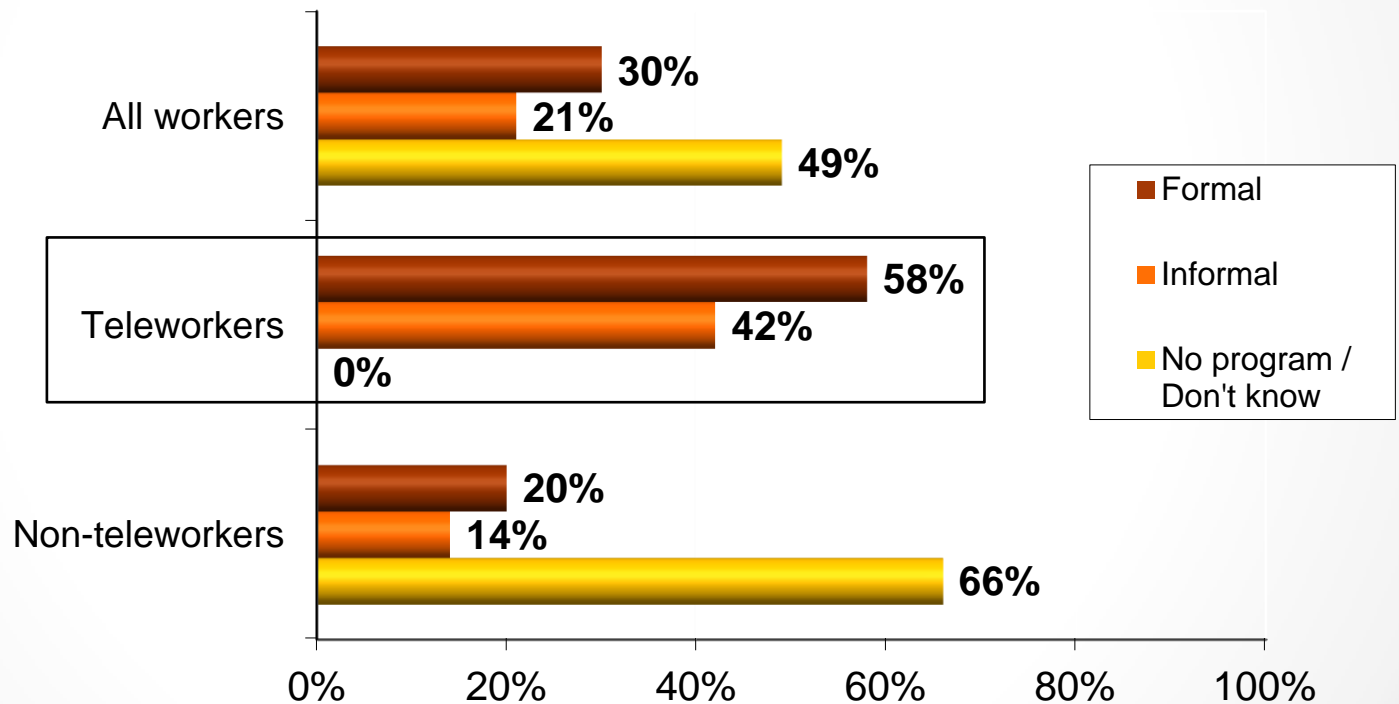
Three in Ten Workers Said Their Employer has a Formal Telework Program; About Half Said the Employer Does not Allow Telework

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

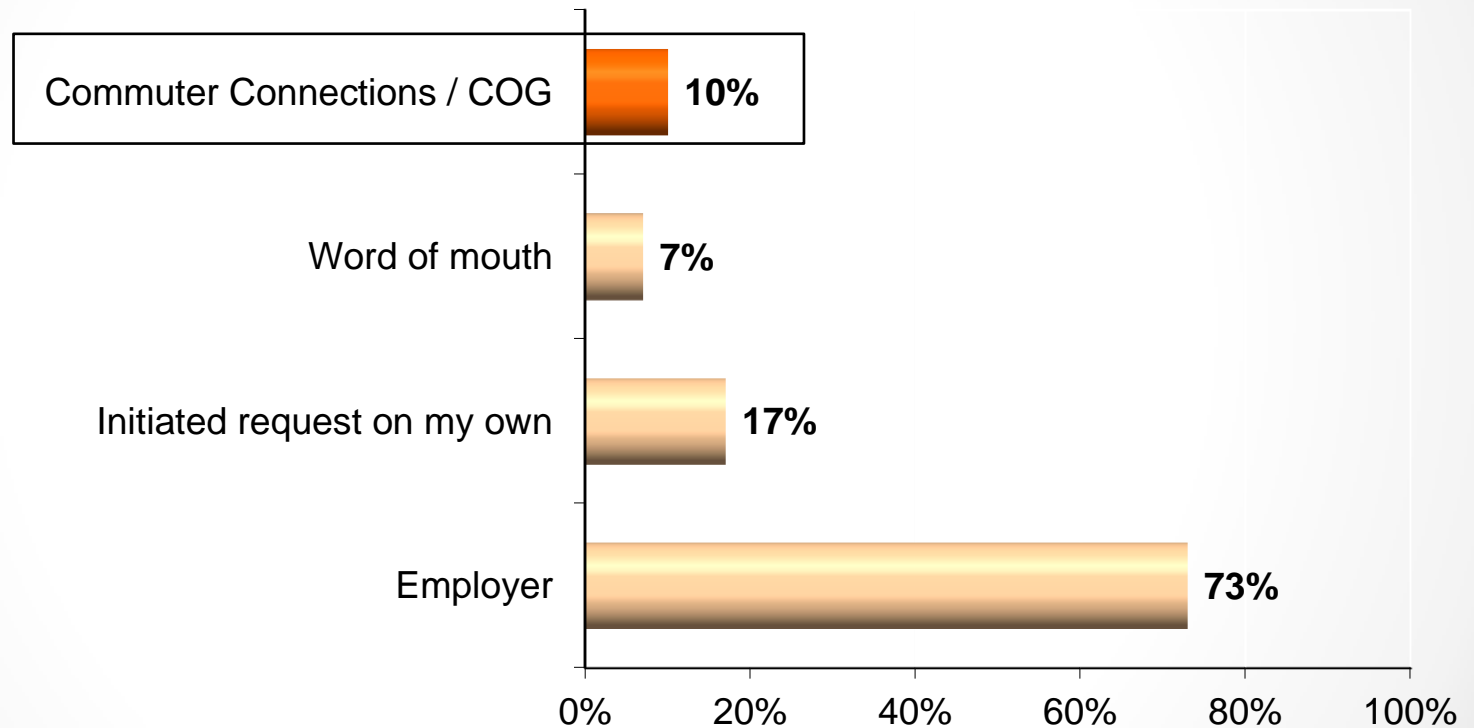


Q13a Does your employer have a formal telecommuting program at your workplace or do you telecommute under an informal arrangement between you and your supervisor?

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



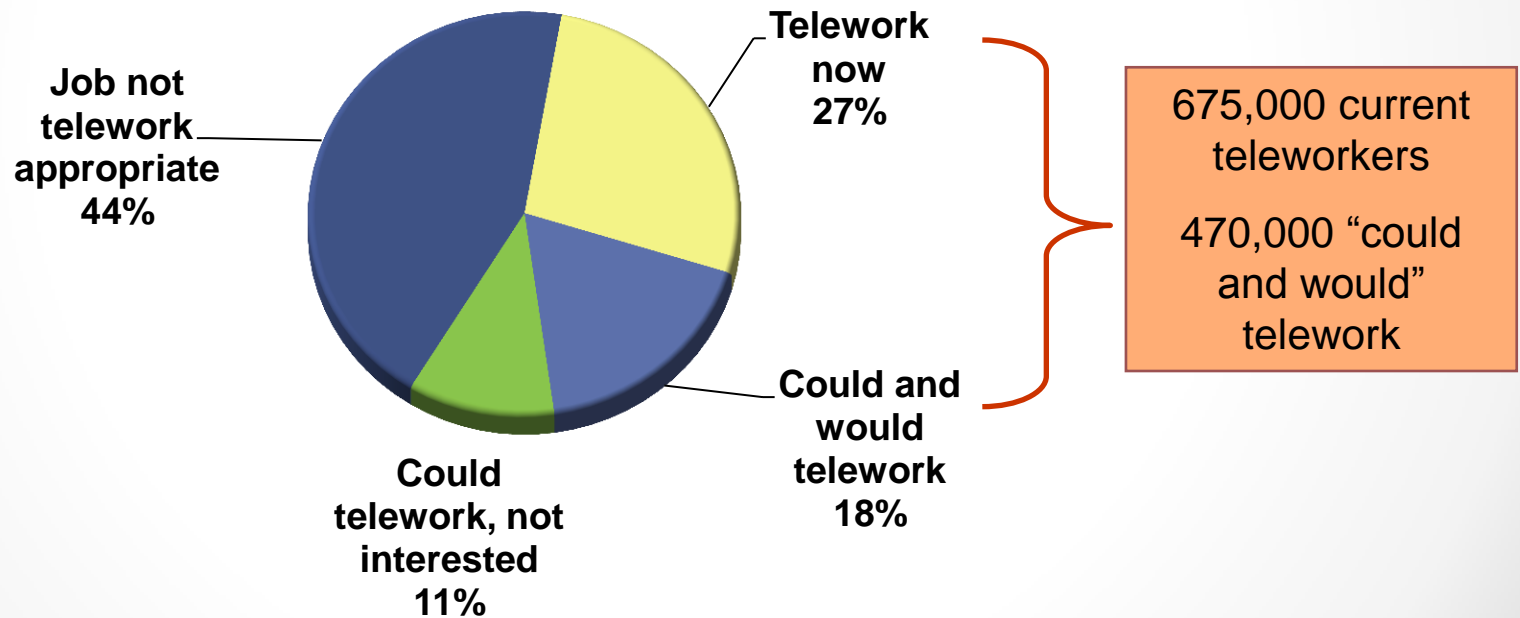
Teleworkers
n = 1,571

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?

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

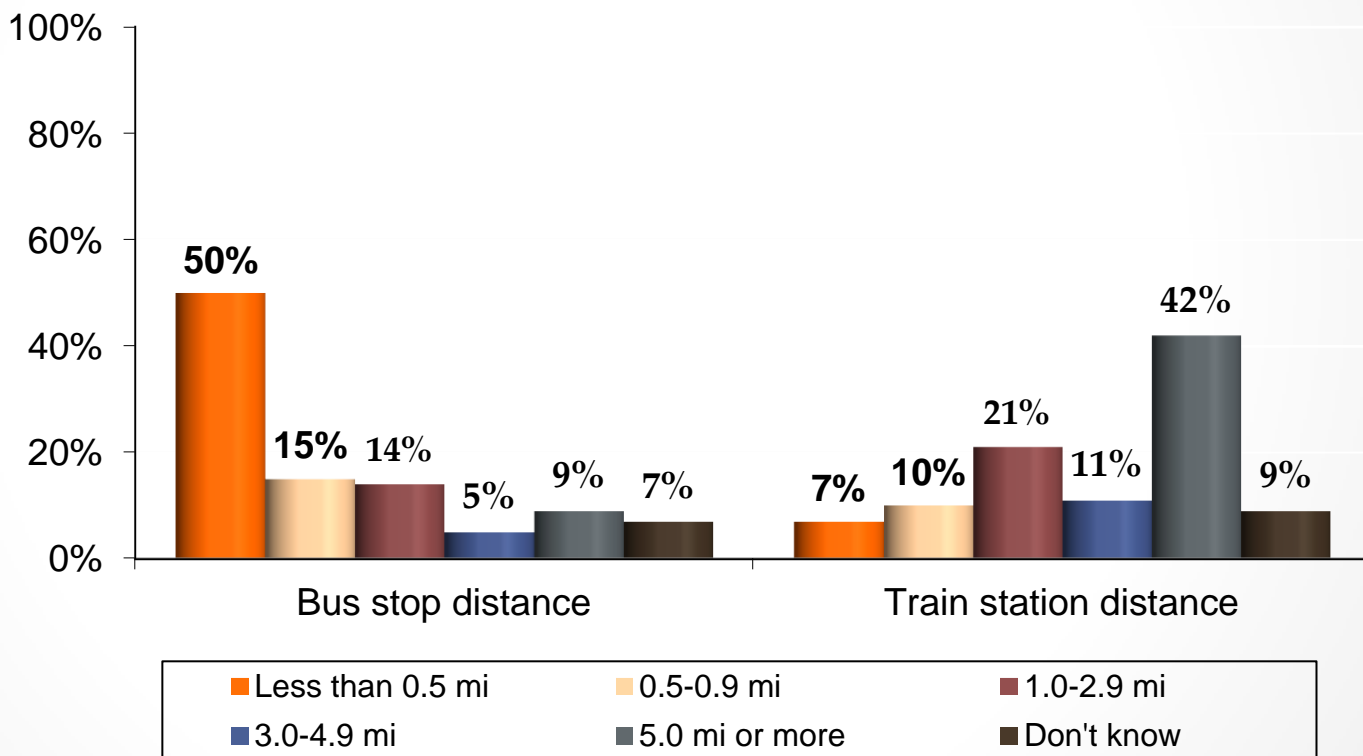
Q14e Would your job responsibilities allow you to work at a location other than your main work place at least occasionally?

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

50% of Respondents Live Less than 1/2 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

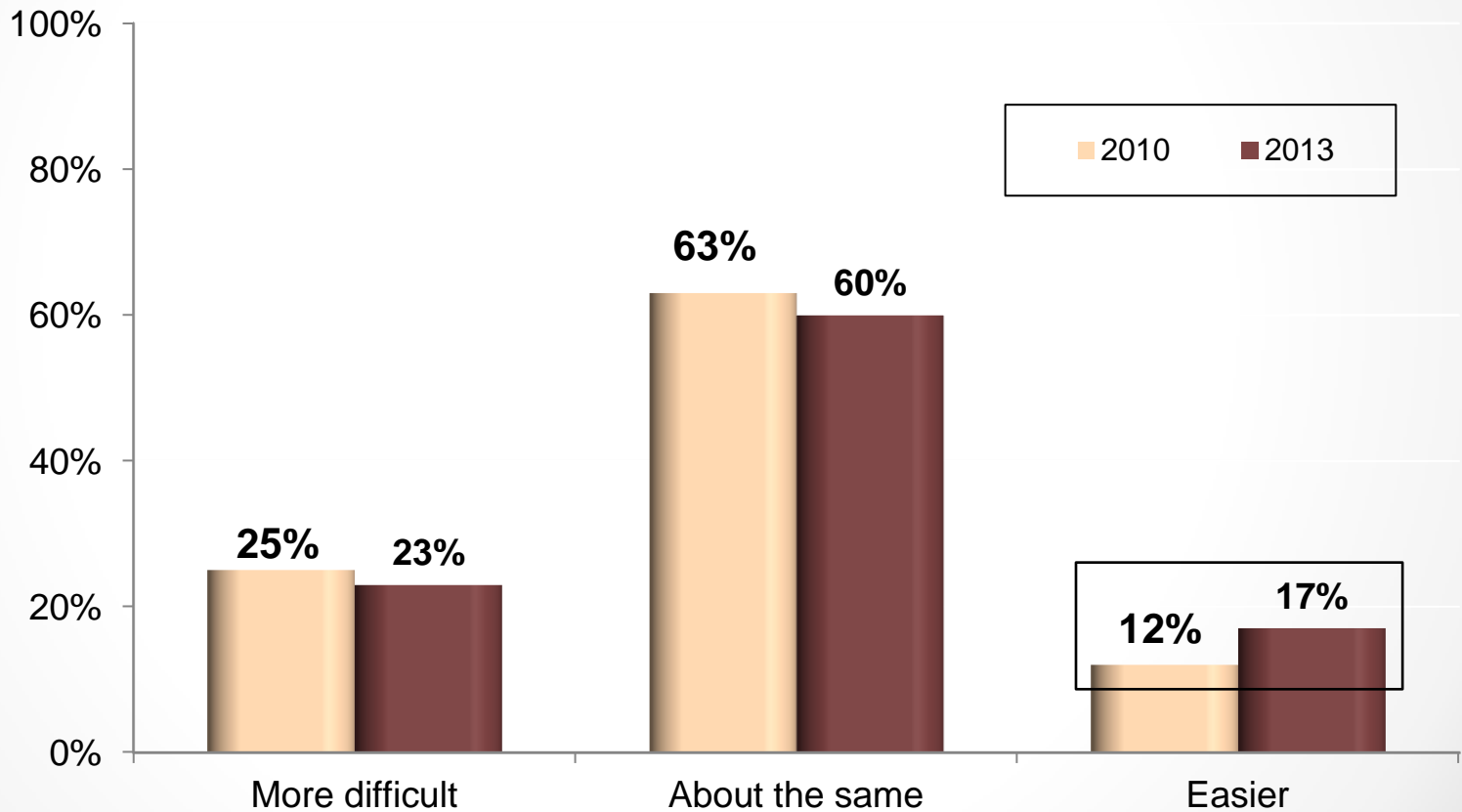
84% and 49% respectively, live a bikeable distance (< 5 miles)



Bus distance
n = 5,718

Train distance
n = 5,718

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

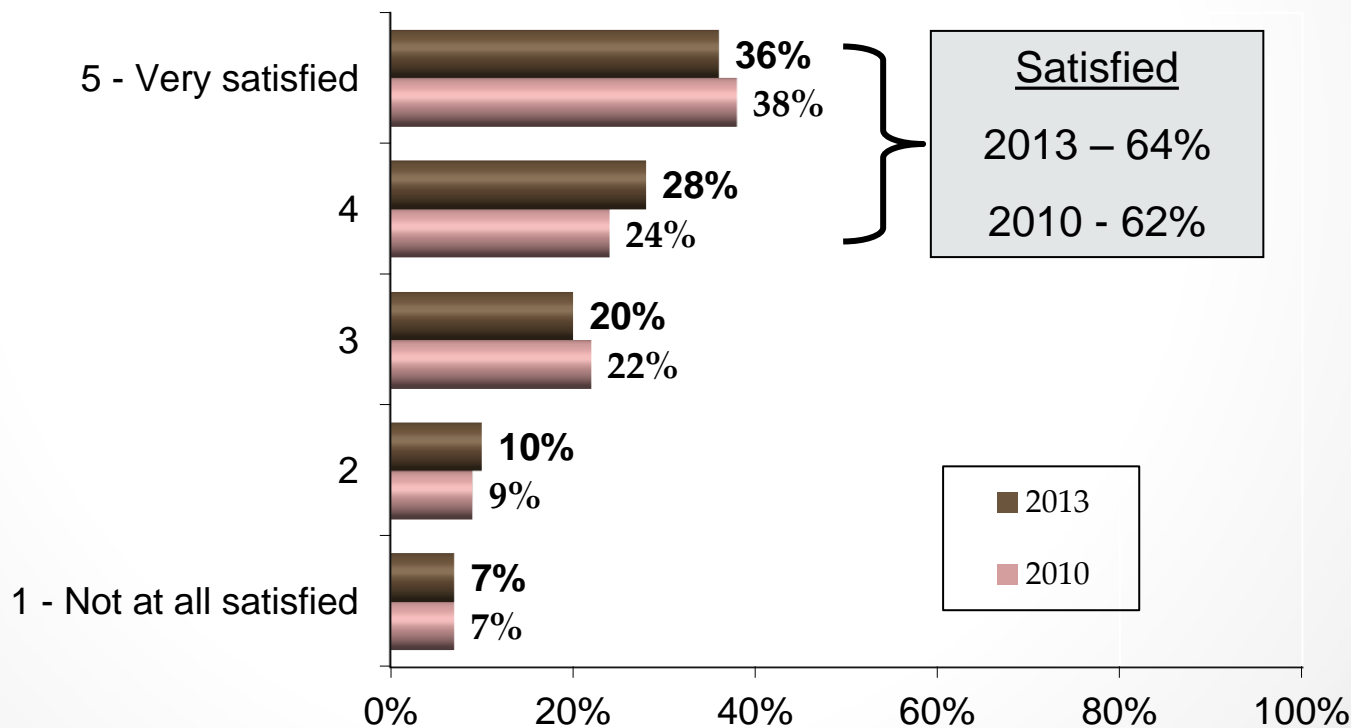


2013
n = 5,717

2010
n = 6,049

64% of Commuters are Satisfied with their Commute – vs 62% 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



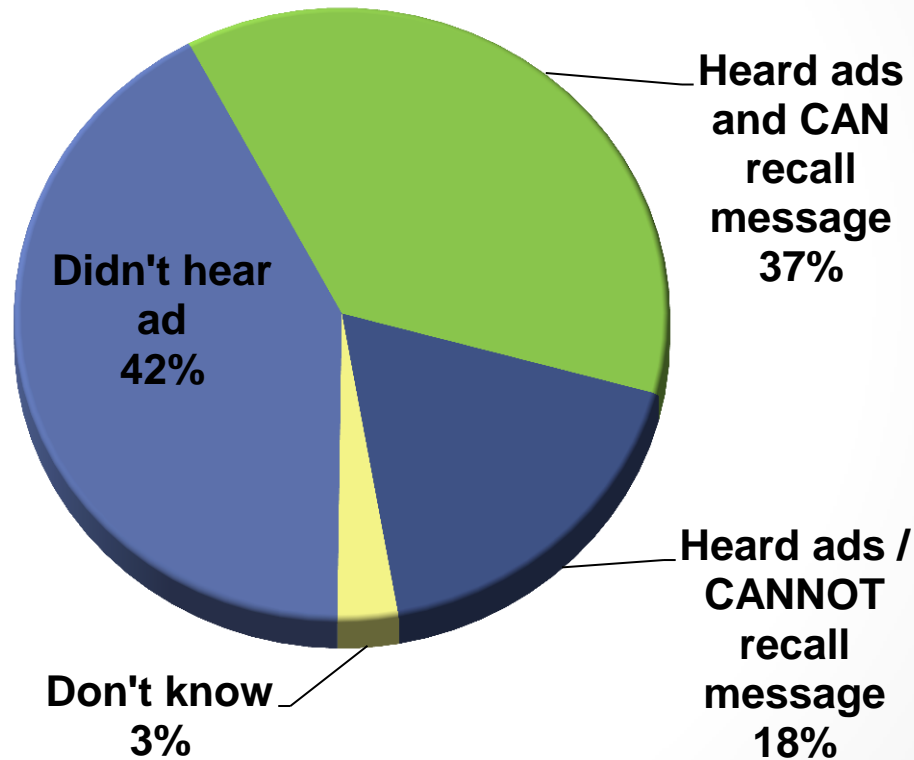
2013
n = 5,692

2010
n = 6,033

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?

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

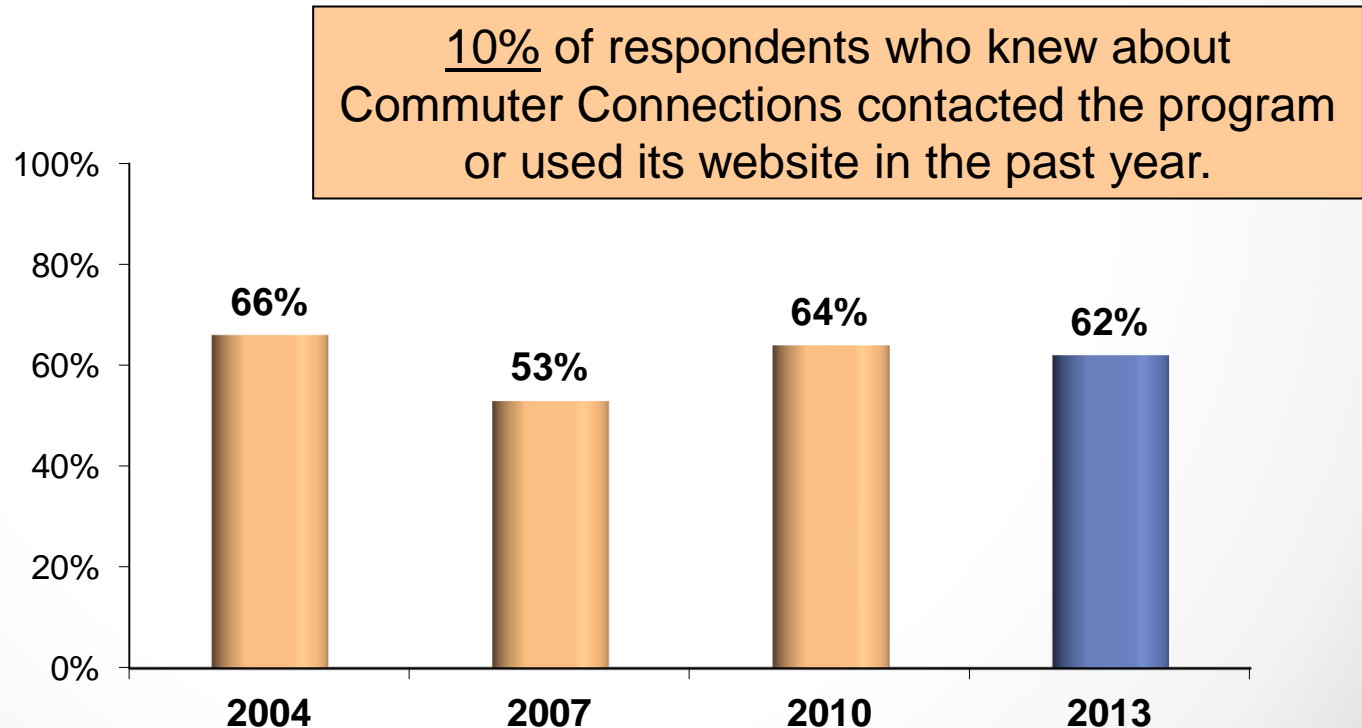
USE of Commuter Connections increased from 5% to 6% of the employed residents of the region

2004 SOC
n = 7,200

2007 SOC
n = 6,600

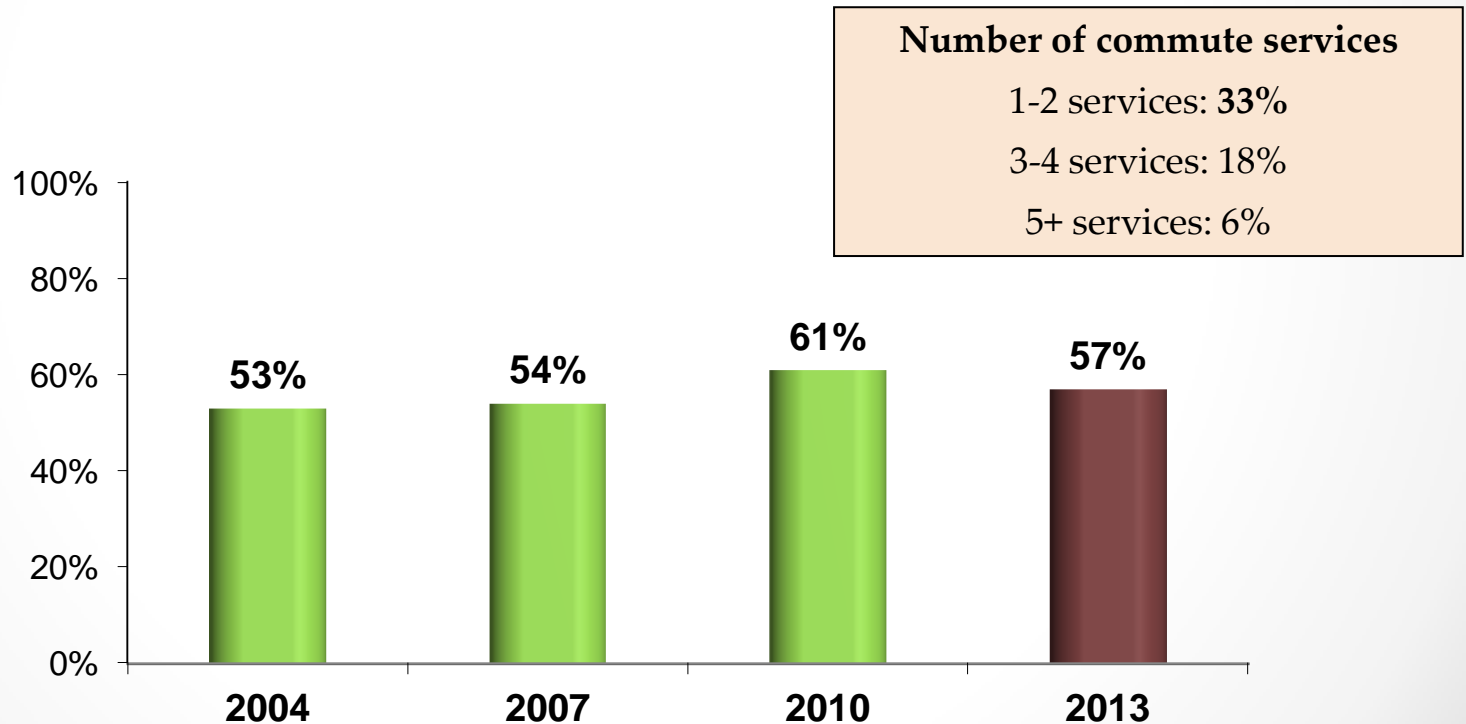
2010 SOC
n = 6,629

2013 SOC
n = 6,335



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



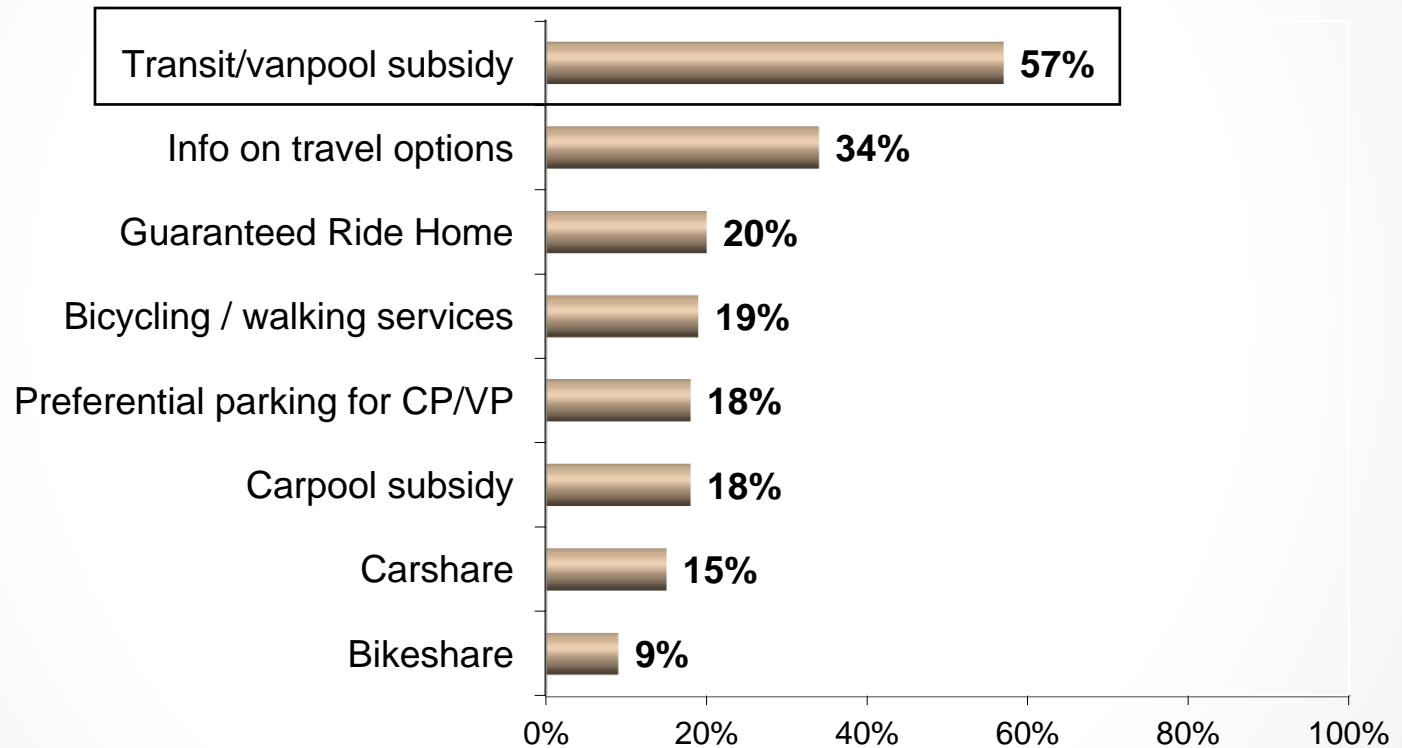
2013 SOC
n = 5,524

2010 SOC
n = 5,899

2007 SOC
n = 6,071

2004 SOC
n =

**For respondents with access to employer commute services,
the most widely used is the transit/vanpool subsidy**



2013 SOC
n = 5,524

Next Steps

• • •

- Review of Technical Report/Comment Period
- Finalize Technical Report in FY 2014
- Prepare and Publish General Public Report in 2014