

Commuter Connections TDM Evaluation Project 2022 State of the Commute Survey

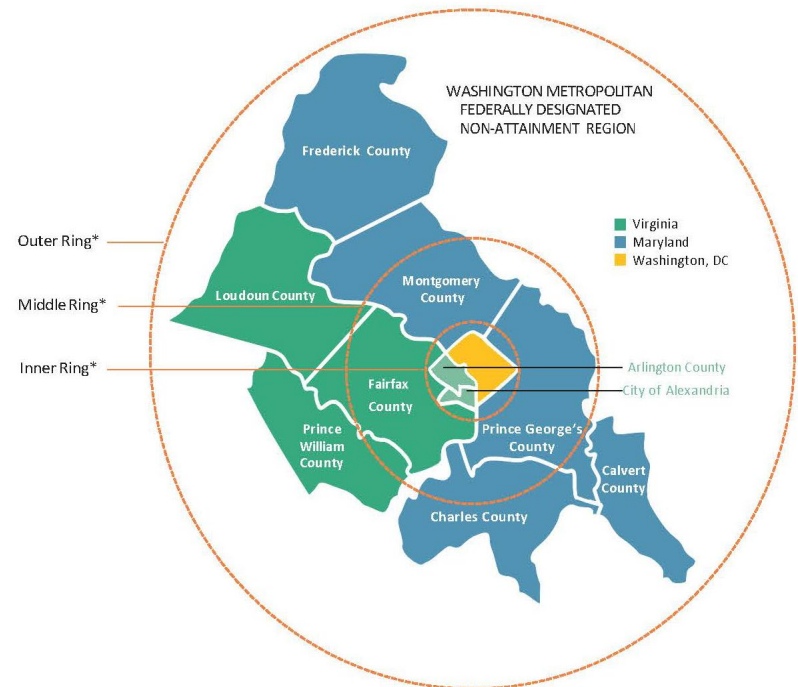
Results Highlights

July 19, 2022

LDA Consulting

with

WBA Research, CUTR, ESTC





SOC Survey Methodology



Survey Methodology – Similar Approach and Sample Size as 2019

- Eighth triennial survey (2001, 04, 07, 10, 13, 16, 19, 2022)
- Interviewed 8,396 employed residents of COG region (95% \pm 1.1%)
- Address-based sample (ABS) method – randomly-selected postal addresses received postcard via USPS with link to Internet survey
- Sample plan set minimum target for each jurisdiction, with higher targets for larger jurisdictions and jurisdictions in center of region

Share your opinions and help improve commuting in the region



Metropolitan
Washington
Council of
Governments

The Council of Governments is conducting a survey about traveling to work for employed residents of your community.

Residents who **complete the survey by the response date** may participate in a random drawing for a **\$250 Amazon Gift Card**. Fifty gift card prizes will be awarded.

Participate: Visit the website below and enter your password. A second employed household member 18 years or older may take the survey using the other password.

www.TravelToWork2022.org

Your Password: **ABCDEF** Other Password: **GHIJKL**

Respond by:
Feb 18

If you are unable to take the survey online, call toll-free 1-844-467-3707. Para realizar la encuesta, seleccione la opción español en el sitio web www.TravelToWork2022.org.

The Metropolitan Washington Council of Governments fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations prohibiting discrimination in all programs and activities. For more information, call (202) 962-3300.

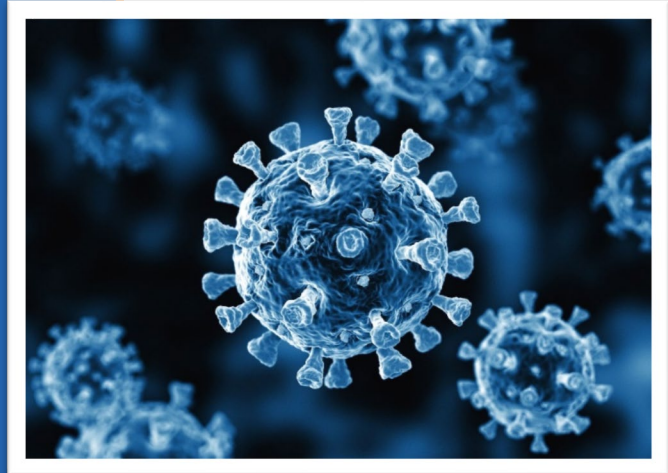
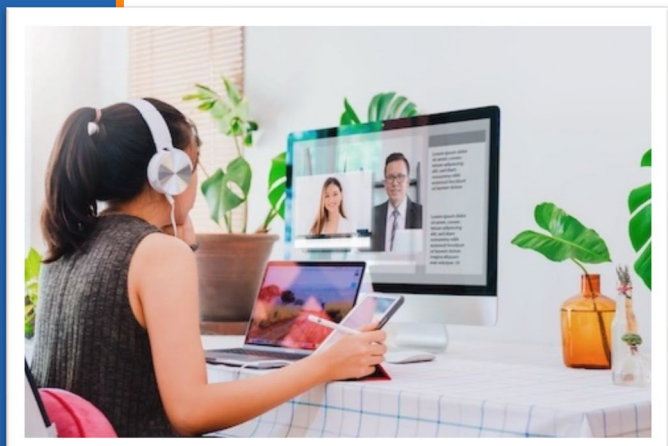
- Jurisdiction counts ranged from 511 – 971 (95% \pm 4.3 for smallest sample)
- County level results were expanded to match the regional worker population
- Data also were weighted to ACS data to adjust sample for race/ethnicity and age



Coronavirus Pandemic -
Notable Changes in Commute

Coronavirus Pandemic Upended Commuting in 2022 vs 2019

Many aspects of commuting changed but some stayed surprisingly consistent



- Widespread commute disruptions
- Telework explosion!
- Increased use of drive alone for commute trips to outside locations
- Declines in transit use across ALL commuter characteristics
- Stable commute distance (mi) but shorter commute time (min)
- Stable commute satisfaction but higher share of workers with easier commutes
- Stable % of work location changes but higher % of home location changes
- Lower awareness of commute ads and info resources, but similar access to employer commute services



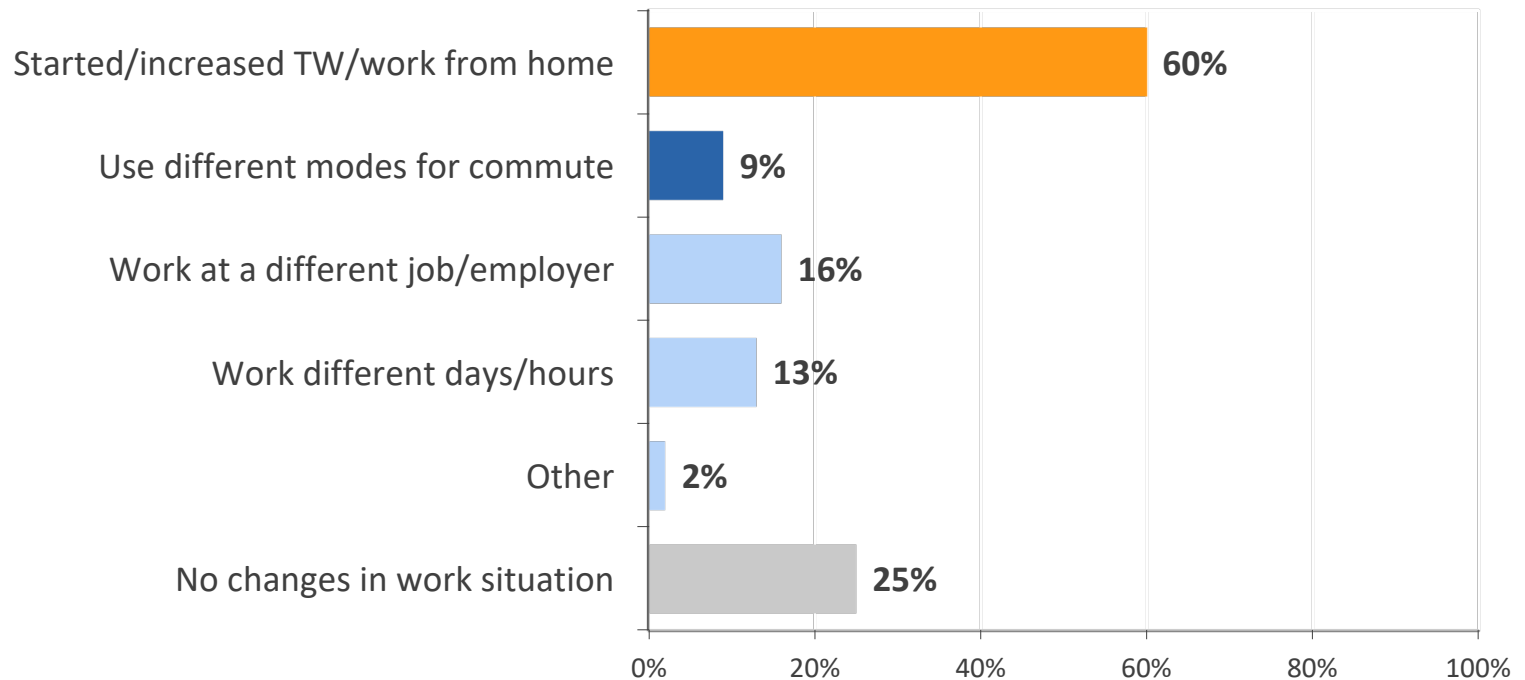
Commuter Patterns and
Telework as a “Mode”

Three-Quarters of Workers Had a Change in Their Commute or Work Situation Since Before the Pandemic (Early 2020)

60% started or increased telework (32% shifted to full-time telework).

One in ten (9%) workers changed the modes they use for days they commute.

Three in ten made a work change; different job (16%), different days/hours (13%)



NOTE: SOC interviews only currently employed residents, so workers who lost jobs during the pandemic and who remained out of the work force are not reflected in the results.

Q15f. Is your current work situation or commute different in any of the following ways, compared with the time before the pandemic in early 2022?

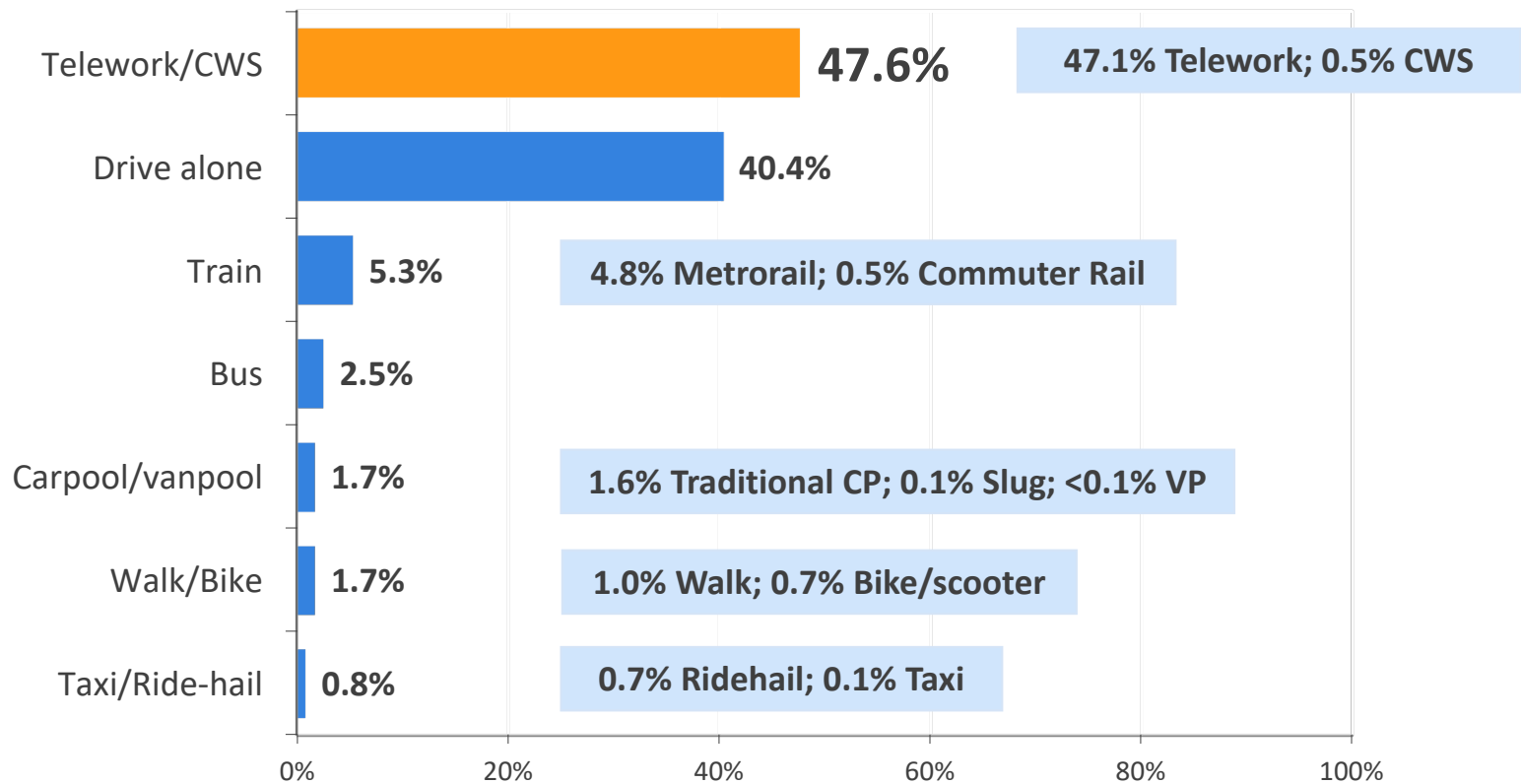
2022 SOC
n = 7,952

Multiple
responses
permitted

Mode Split – Percentage of Weekly Commute Trips/Days

In 2022, Telework Accounted for 48% of Weekly Commute Trips

Drive alone accounted for 40% of weekly commute trips;
12% of commute trips were made in alternative modes



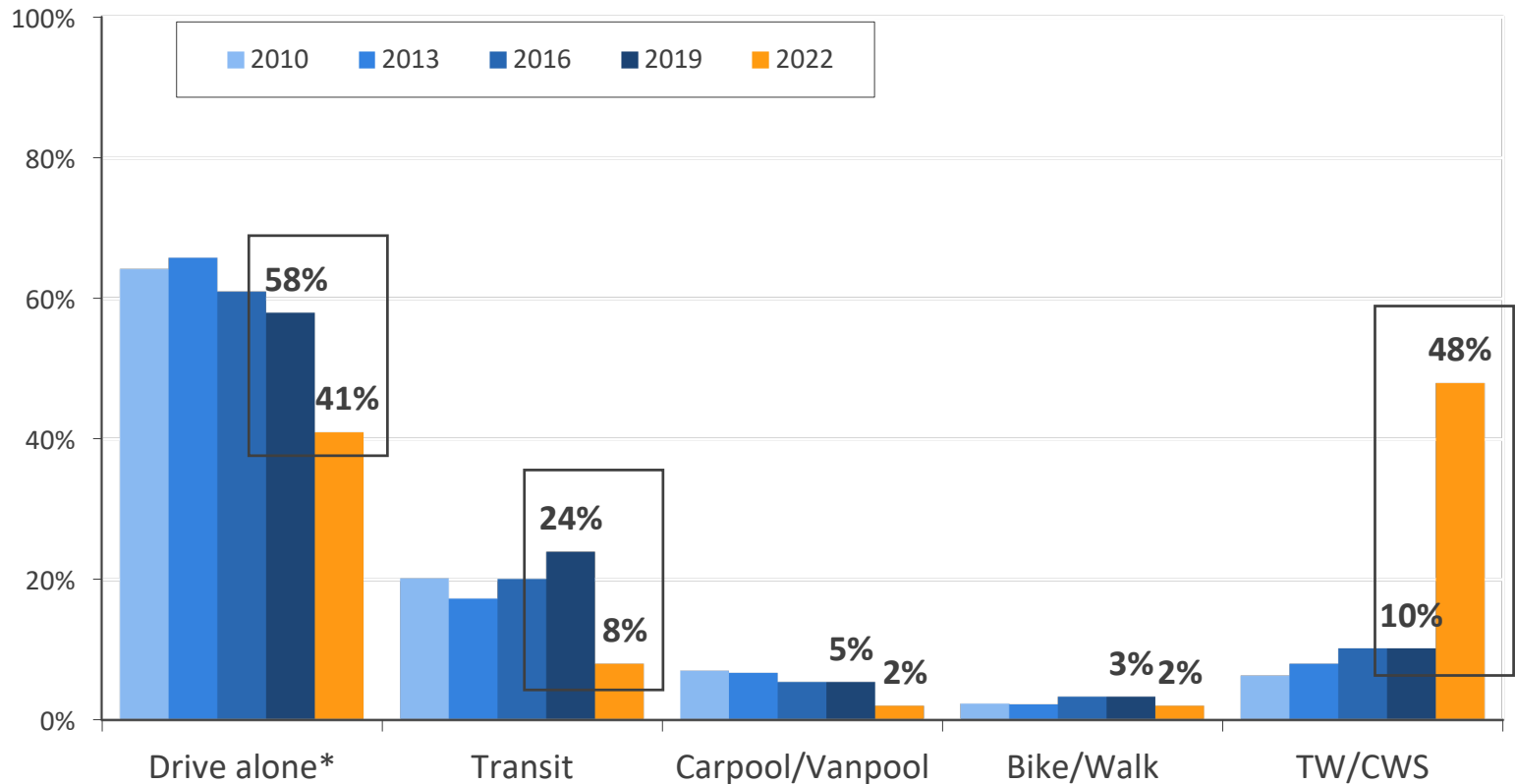
2022 SOC
n = 8,114

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

Q15. In a typical work week, what type of transportation do you use on each of the days you work? If your travel to work varies from week to week, report for the MOST typical week.

Telework's 2022 Share of Weekly Commute Trips (48%) Was Nearly Five Times the 2019 Share (10%)

Use of other modes declined: Drive alone from 58% to 41%; Transit from 24% to 8%; Smaller Drops for Rideshare and Bike/Walk



2010 SOC
n = 6,050

2013 SOC
n = 5,892

2016 SOC
n = 5,503

2019 SOC
n = 8,107

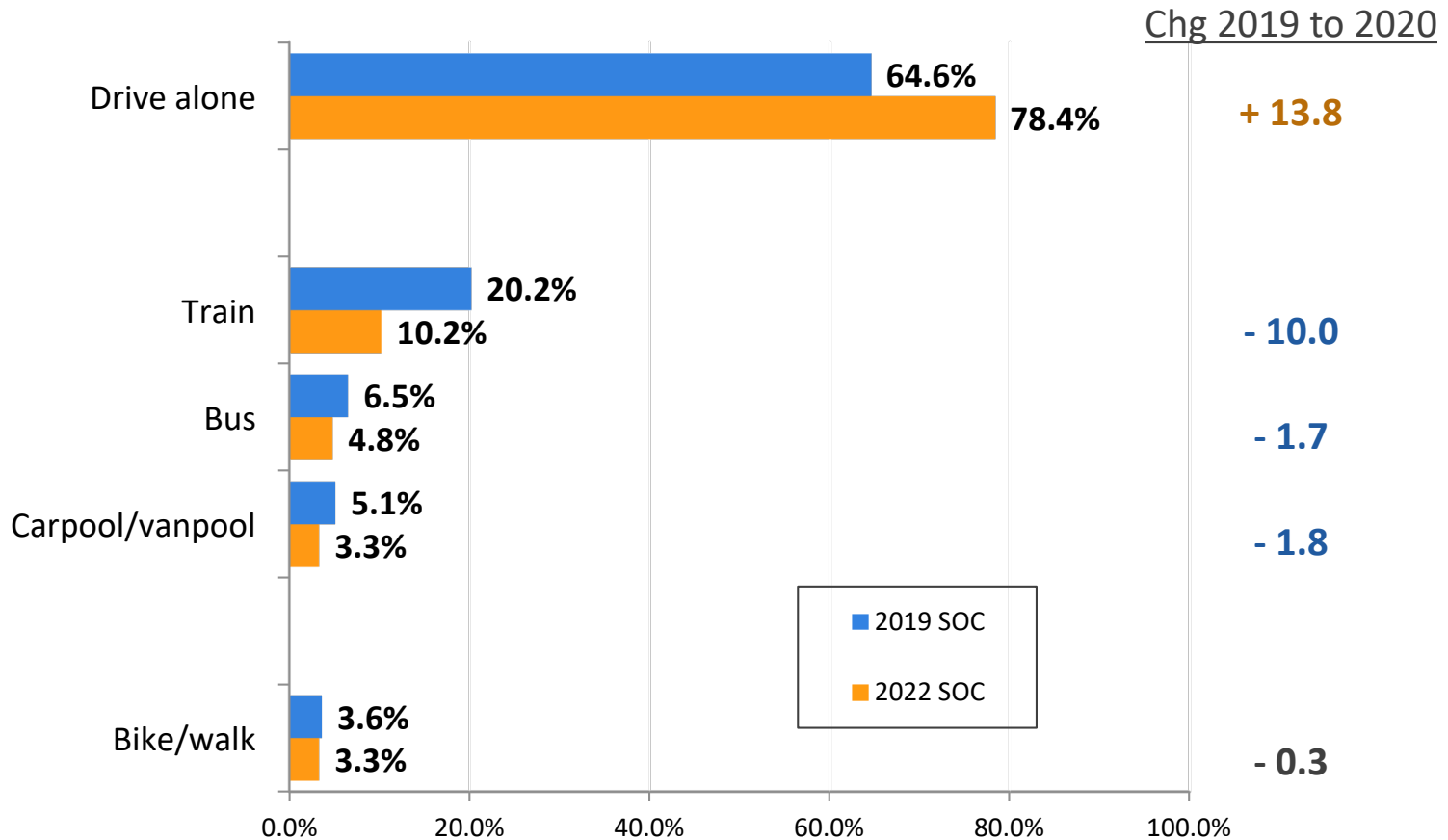
2022 SOC
n = 8,144

* Drive alone includes motorcycle, taxi, and ride-hail

Q15. In a typical work week, what type of transportation do you use on each of the days you work?

If TW is Excluded, Use of Drive Alone INCREASED 14 Percentage Points for Trips Made to Outside Work Locations

Train use dropped by 10 points, CP/VP and bus each declined about 2 points



2019 SOC
n = 8,107

2022 SOC
n = 8,144

* Drive alone includes motorcycle, taxi, and ride-hail

Q15. In a typical work week, what type of transportation do you use on each of the days you work?

Commuters Who Used Alternative Modes Pre-Pandemic Switched Modes More than Did Drive Alone Commuters – Many Shifted to Telework, but Some to Driving Alone

About three in ten alternative mode commuters stayed in their pre-pandemic modes, vs 62% of commuters who drove alone pre-pandemic

Pre-pandemic Primary Mode (Early 2020)	Current Primary Commute Mode (Early 2022)					
	Telework	Drive Alone	Carpool/ Vanpool	Bus	Train	Bike/ Walk
All respondents	45%	42%	2%	3%	6%	2%
Drive alone	34%	62%	1%	1%	1%	1%
Carpool/vanpool	50%	16%	32%	1%	1%	0%
Bus	50%	14%	2%	28%	4%	2%
Train	63%	10%	1%	2%	23%	1%
Bike/walk	55%	10%	2%	1%	4%	28%
Telework	97%	3%	0%	0%	0%	0%

Q15. In a typical work week, what type of transportation do you use on each of the days you work?

Q15f. ... Which single type of transportation did you use MOST days for your trip to work before the pandemic.

Pre-pandemic mode

All respondents n = 8,126

Drive alone n = 4,874

CP/VP n = 231

Bus n = 556

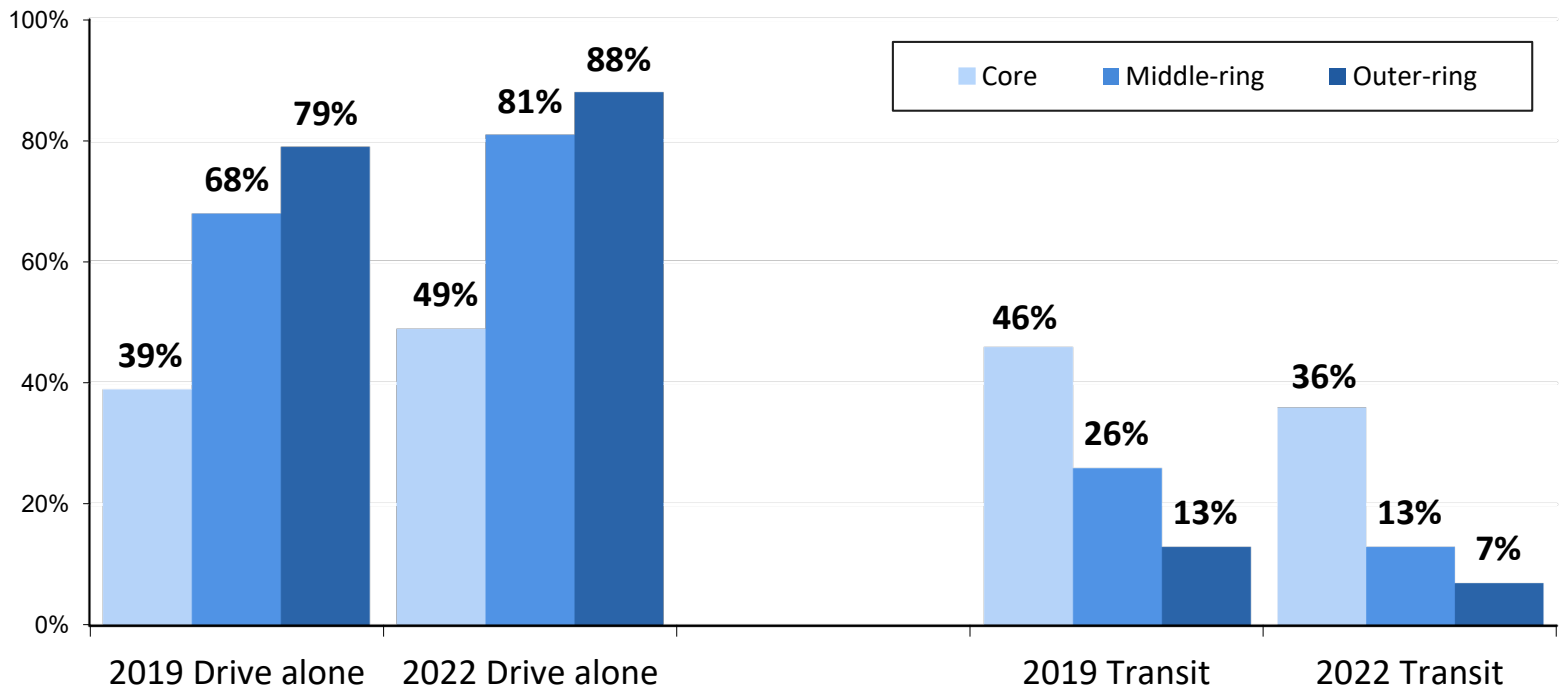
Train n = 1,495

Bike/walk n = 413

Telework n = 442

Transit Lost Mode Share to Driving Alone Among ALL Sub-Groups in 2022, Even Traditional Transit Populations (Core Residents, Core Workers, Young, Non-White, Limited Car Access)

Excluding TW, relative mode use in 2022 was similar to 2019, e.g., Core area residents used transit more in 2022 than did Middle-ring and Outer-ring residents, but transit lost mode share to driving alone in all three sub-areas



Q15. In a typical work week, what type of transportation do you use on each of the days you work?

2019 SOC

Core
n = 2,198

Middle-Ring
n = 2,421

Outer-Ring
n = 4,488

2022 SOC

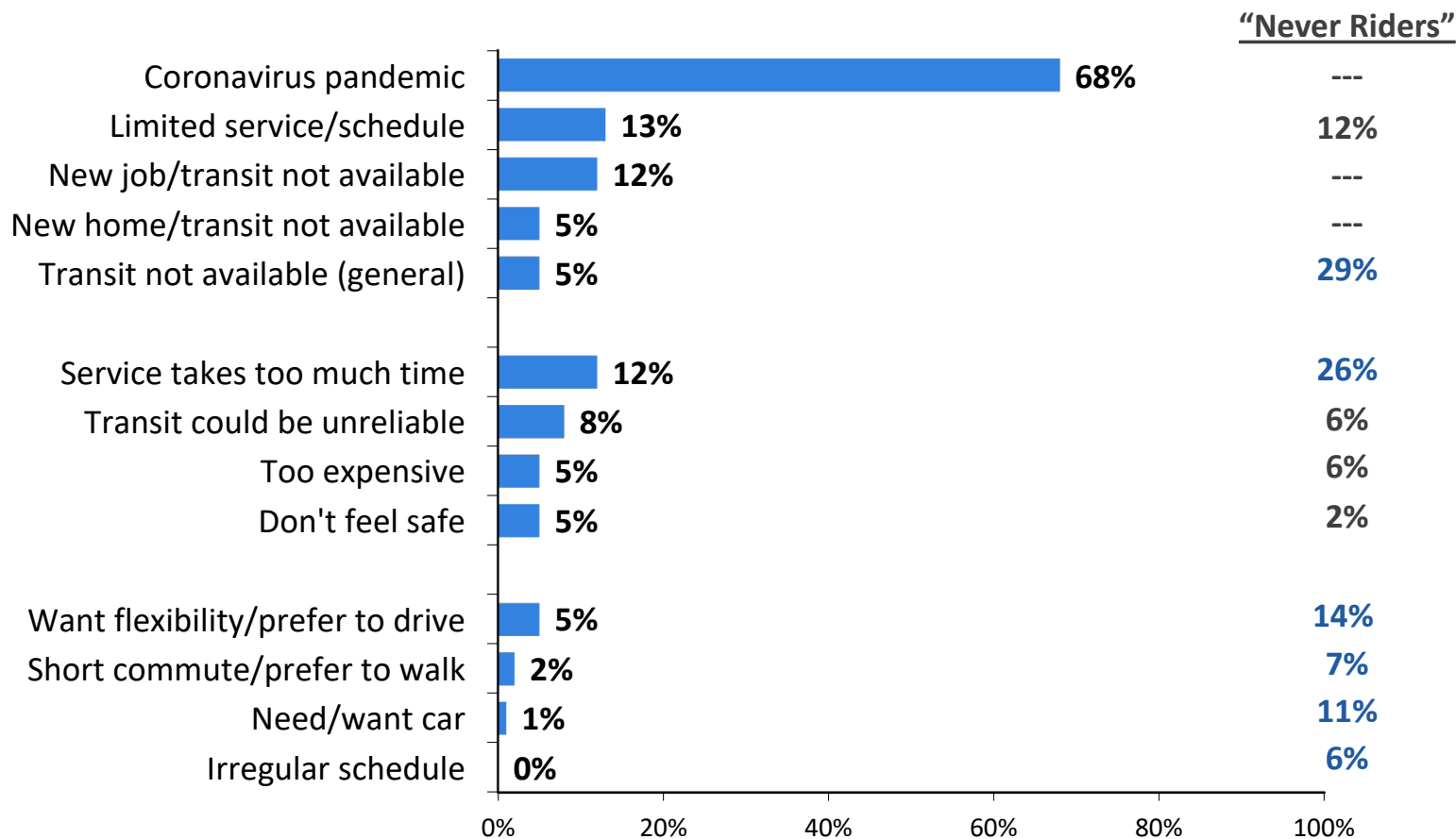
Core
n = 2,560

Middle-Ring
n = 2,528

Outer-Ring
n = 3,038

68% of Commuters Who Stopped Riding Transit Between 2019 and 2022 Said Coronavirus Pandemic Was a Factor

Service availability also was a factor, for some because their home or work location had changed. Service attributes were less important to former riders than to commuters who never used transit in recent years (“never riders”).



Respondents who were commuting at time of the survey

Former riders (stopped using transit for commute in past 3 years)
n = 636

Never riders (never rode transit in past three years)
n = 3,418

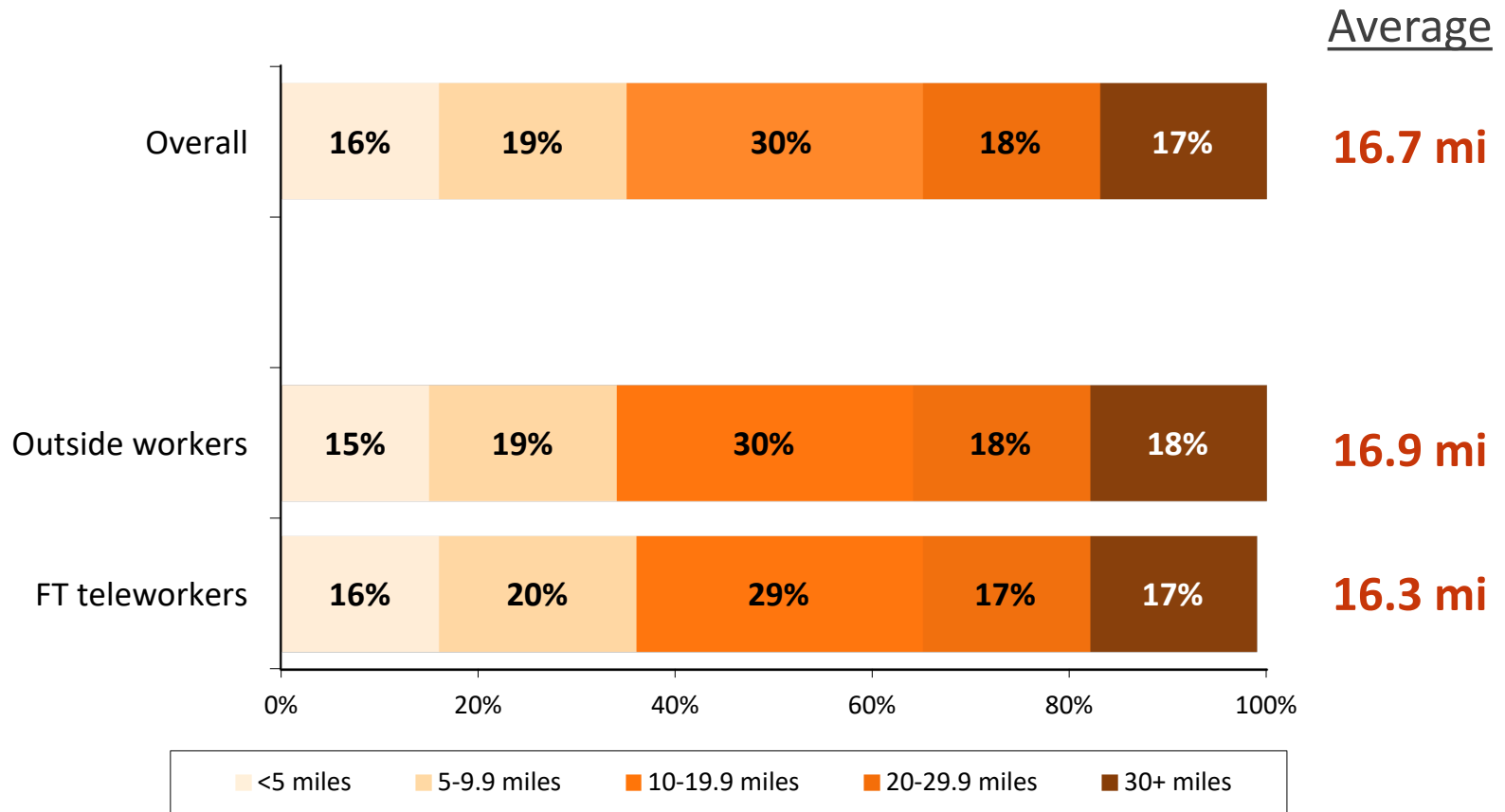
Q53d. How significant a factor was the coronavirus pandemic in your decision to stop riding transit for your commute?

Q53e. What other factors influenced your decision to stop using transit for your commute?

Q54. What reasons keep you from regularly using public transit for your commute to work now?

In 2022, Workers Who Commuted to Outside Work Locations Traveled an Average of 16.9 Miles – Similar to 2019 (17.1 Miles)

Full-time teleworkers WOULD be traveling 16.3 miles, if they were still commuting.



2022 SOC

Overall
n = 7,291

Outside
workers
n = 4,854

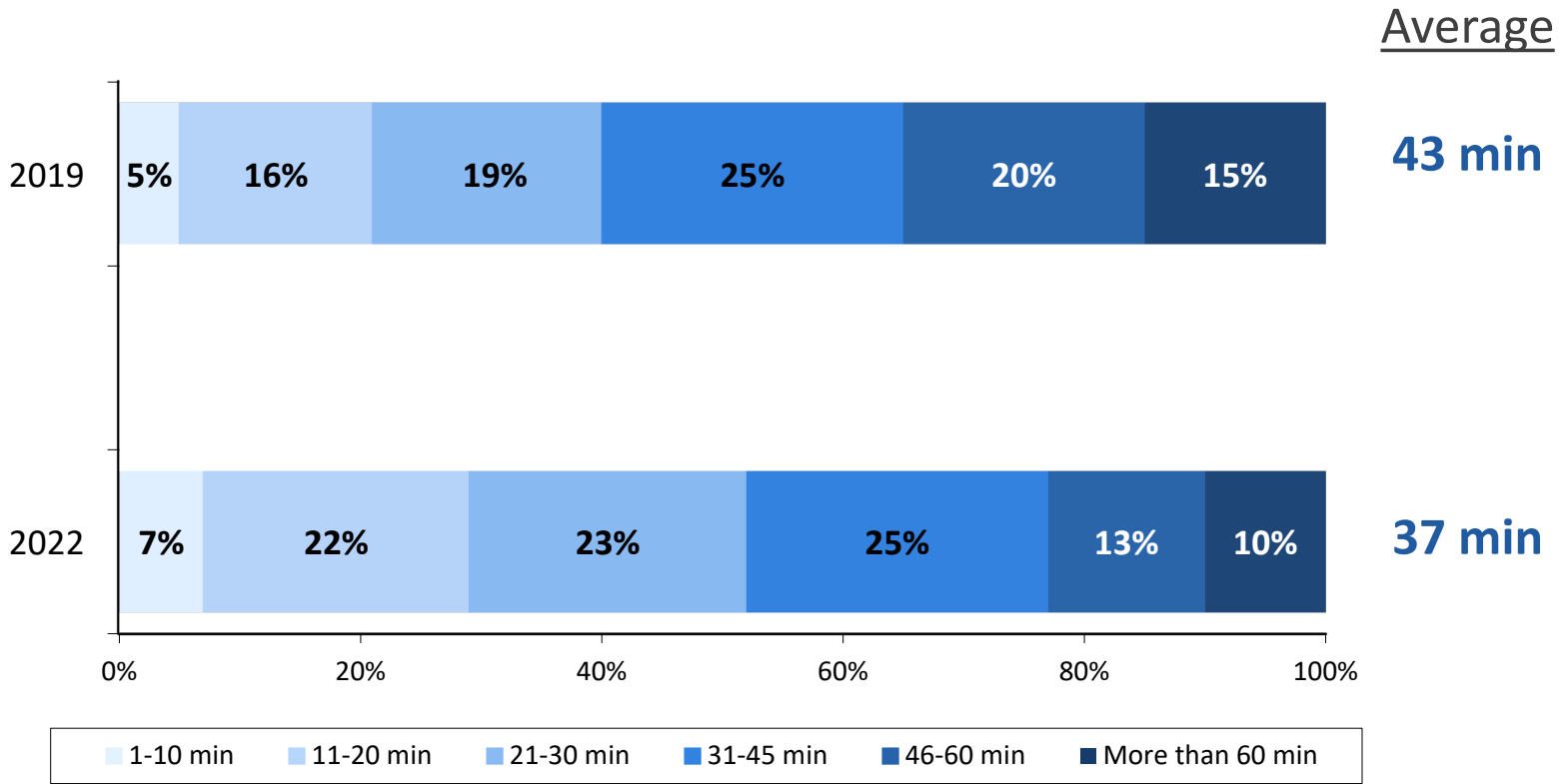
Full-time
teleworkers
n = 2,452

Q15m You said you are working from home full-time now. How many miles is it one-way from your home to where you would work if you were not working from home?

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

But Ave Commute Time Dropped – 37 Minutes for Workers Who Commuted to Outside Work Locations in 2022 vs 43 Min in 2019

The shift of many commute trips to telework could have resulted in faster trips for those who continued commuting but shifts from transit, which has a long average travel time, to driving alone, which has shorter time, also could have contributed.



2019 SOC
n = 7,862

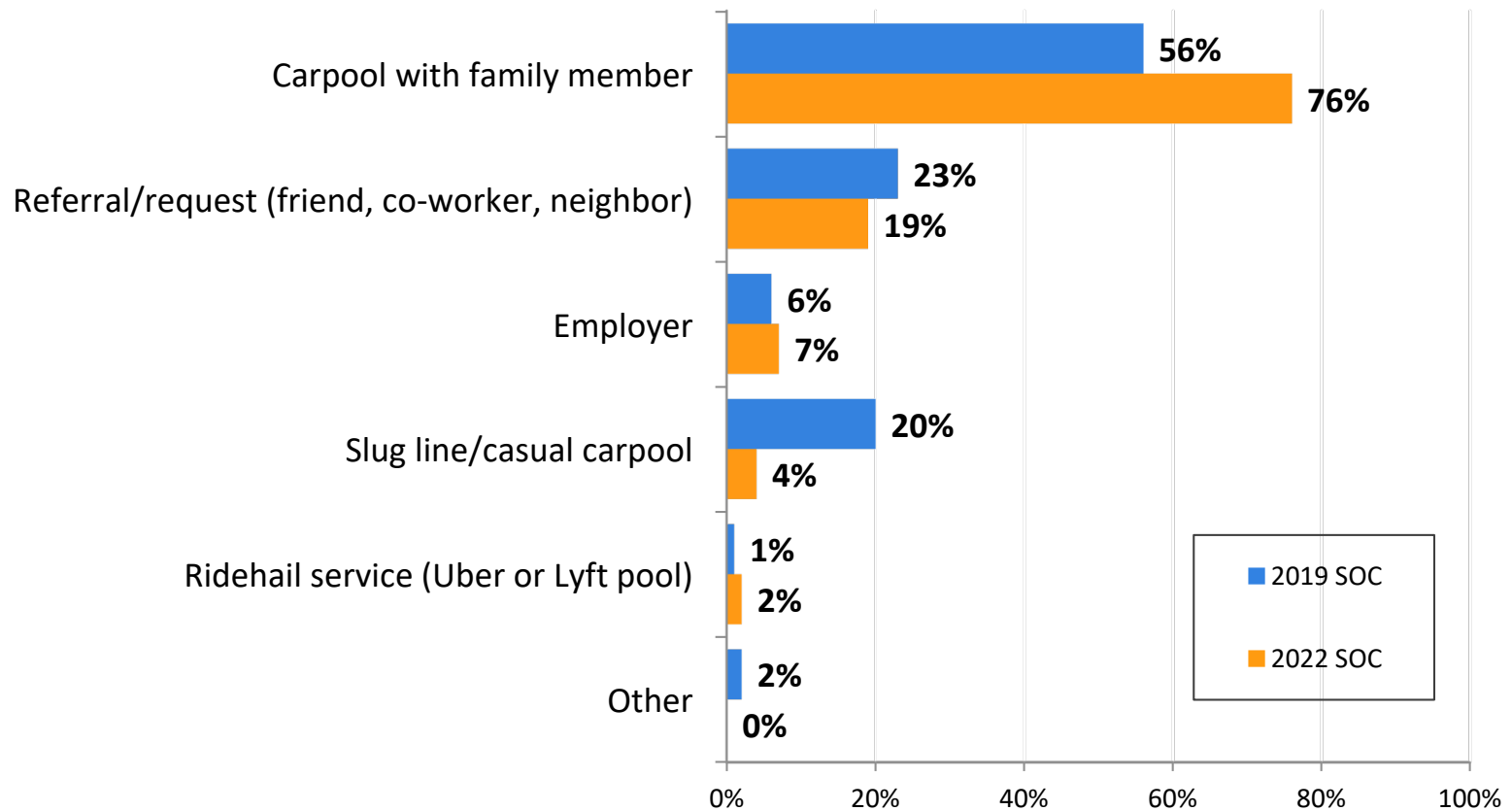
2022 SOC
n = 5,088

Base includes only workers who travel to outside work location 1 or more days per week

Q16a How many minutes does it typically you to travel from home to work?

In 2022, 76% of Carpoolers “Found” Their Carpool Partner by Riding with Family Members; In 2019, 56% were Household CPs

The other major difference in carpool formation in 2022 was the drop in slug line/casual carpool from 20% in 2019 to 4% in 2022



2019 SOC
n = 420

2022 SOC
n = 153

Multiple
responses
permitted

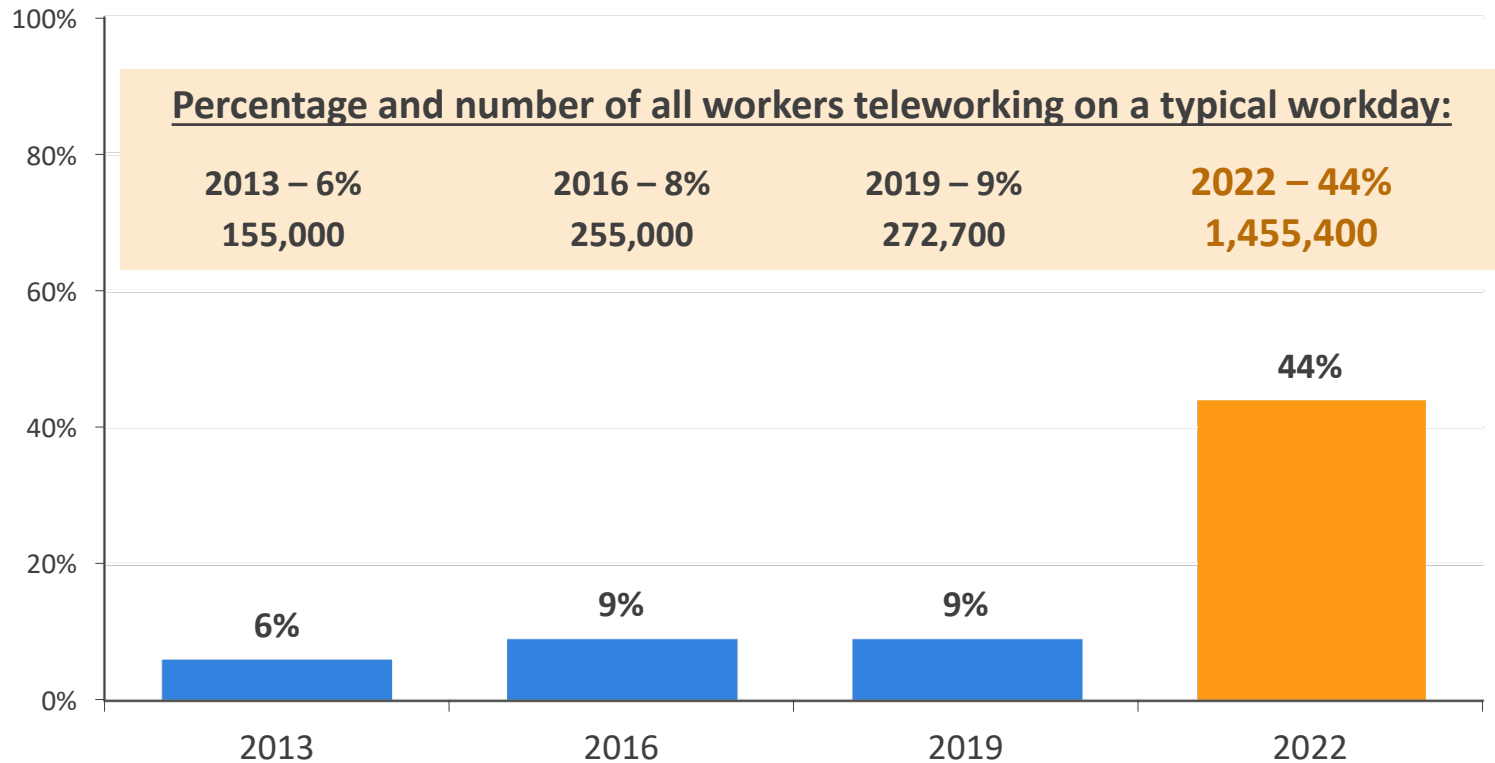
Q28a. How did you find the people with whom you now carpool?



Telework
Experience

Telework Had a Dramatic Daily Impact on Commuting in 2022; Nearly 1.5 Million Regional Workers Teleworked on a Typical Work Day – 44% of All Workers

This was a 5-fold increase over 2019, when only 9% of workers TW on a typical day



2013 SOC
n = 5,892

2016 SOC
n = 5,503

2019 SOC
n = 8,124

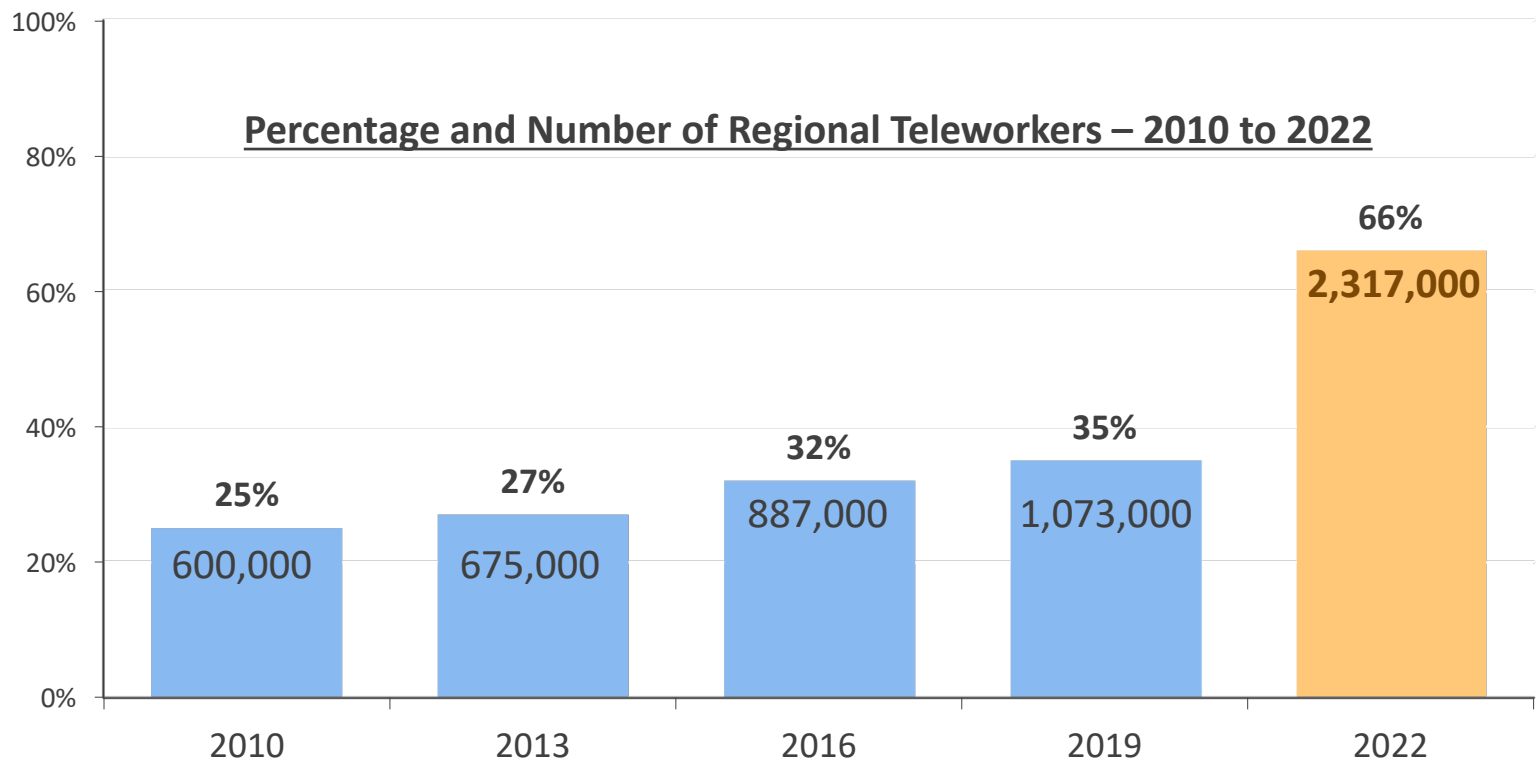
2022 SOC
n = 8,396

Q12. Currently, how often do you usually telecommute/telework for an entire workday?

Q14k. In the past year, about how many days did you work at home all day on a regular workday, instead of traveling to your main workplace?

The High Daily Impact is Due in Part to the Number of Teleworkers: In 2022, 2.3 Million Regional Workers Teleworked at Least Occasionally – 66% of Commuters

Percentage of commuters who teleworked grew steadily from 2010 through 2019, but doubled in 2022



2010 SOC
n = 6,050

2013 SOC
n = 5,892

2016 SOC
n = 5,503

2019 SOC
n = 8,107

2022 SOC
n = 8,139

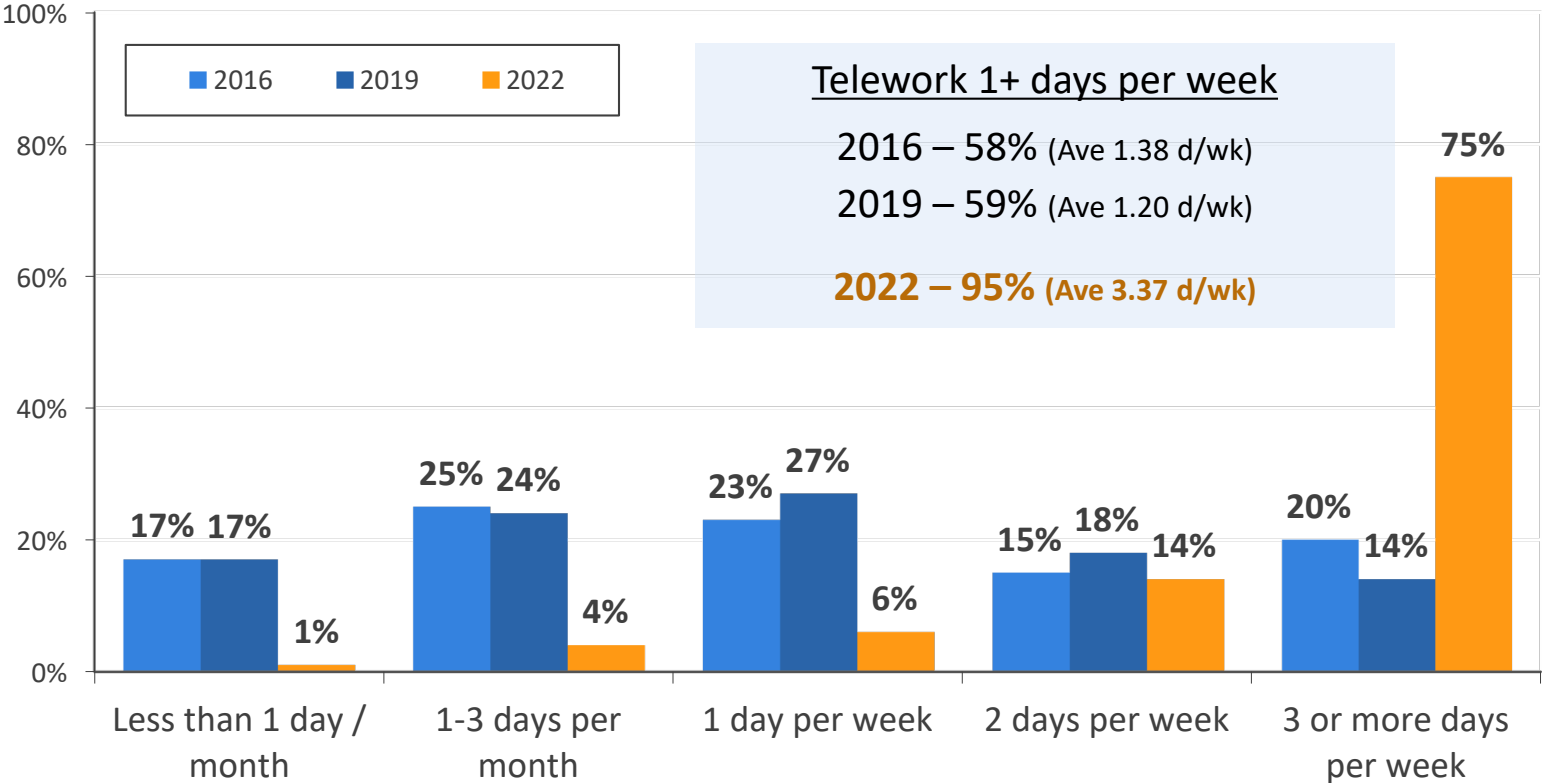
Excludes workers who are self-employed and work only at home

Q6 At the PRESENT TIME, do you work from home or from a telework/co-working center on some or all of your regularly assigned workdays? You might call this telecommuting, teleworking, or working remotely. Please include only days that you telework during an entire workday.

Q12. Currently, how often do you usually telecommute/telework for an entire workday?

Telework's High Impact Also Was Due to High TW Frequency – In 2022, an Average of 3.37 Days per Week; **95% of Teleworkers Teleworked 1+ Days per Week**

In 2019, the average was 1.20 days and only 59% teleworked weekly



Q12. Currently, how often do you usually telecommute/telework for an entire workday?

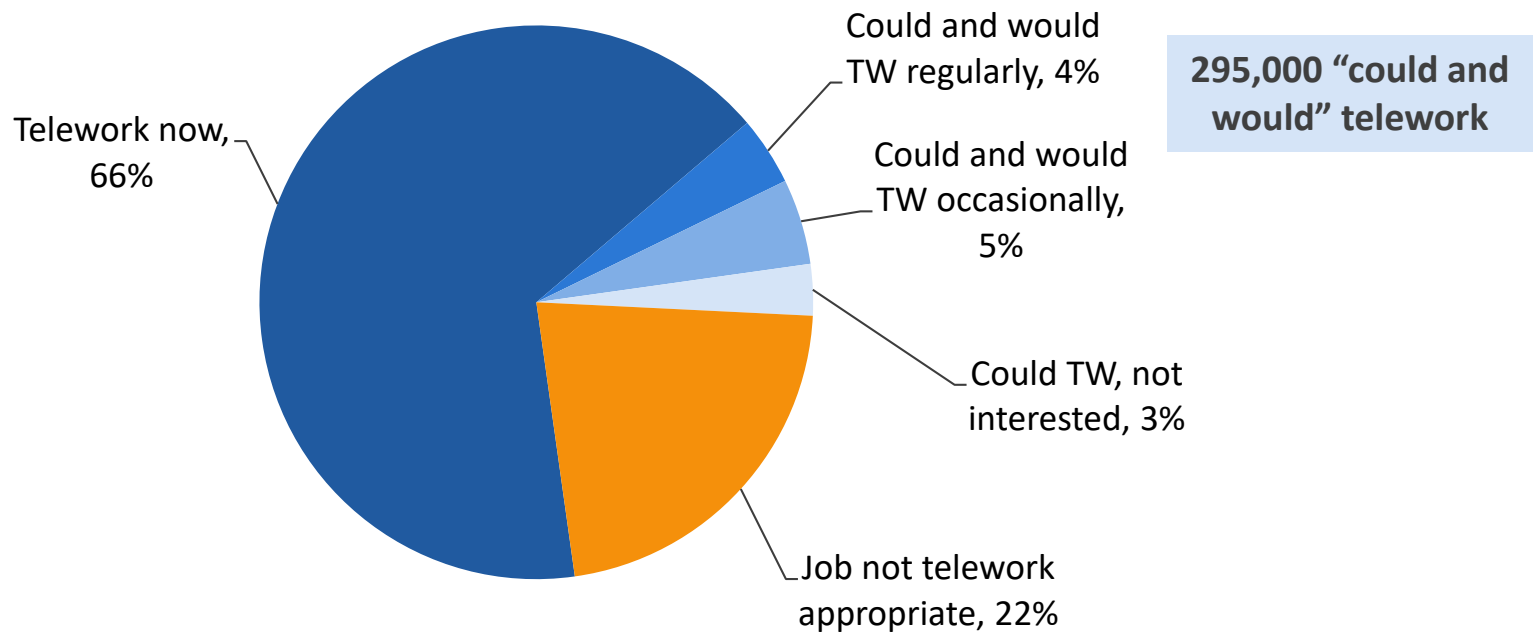
2016 SOC
n = 1,559

2019 SOC
n = 1,874

2022 SOC
n = 5,514

Even Considering the High Share of Workers Who Teleworked in 2022, There is Potential for Additional Telework

Nearly one-third of non-teleworkers (9% of all workers) could do some work at a remote location and would telework be interested in teleworking.



n = 8,139

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

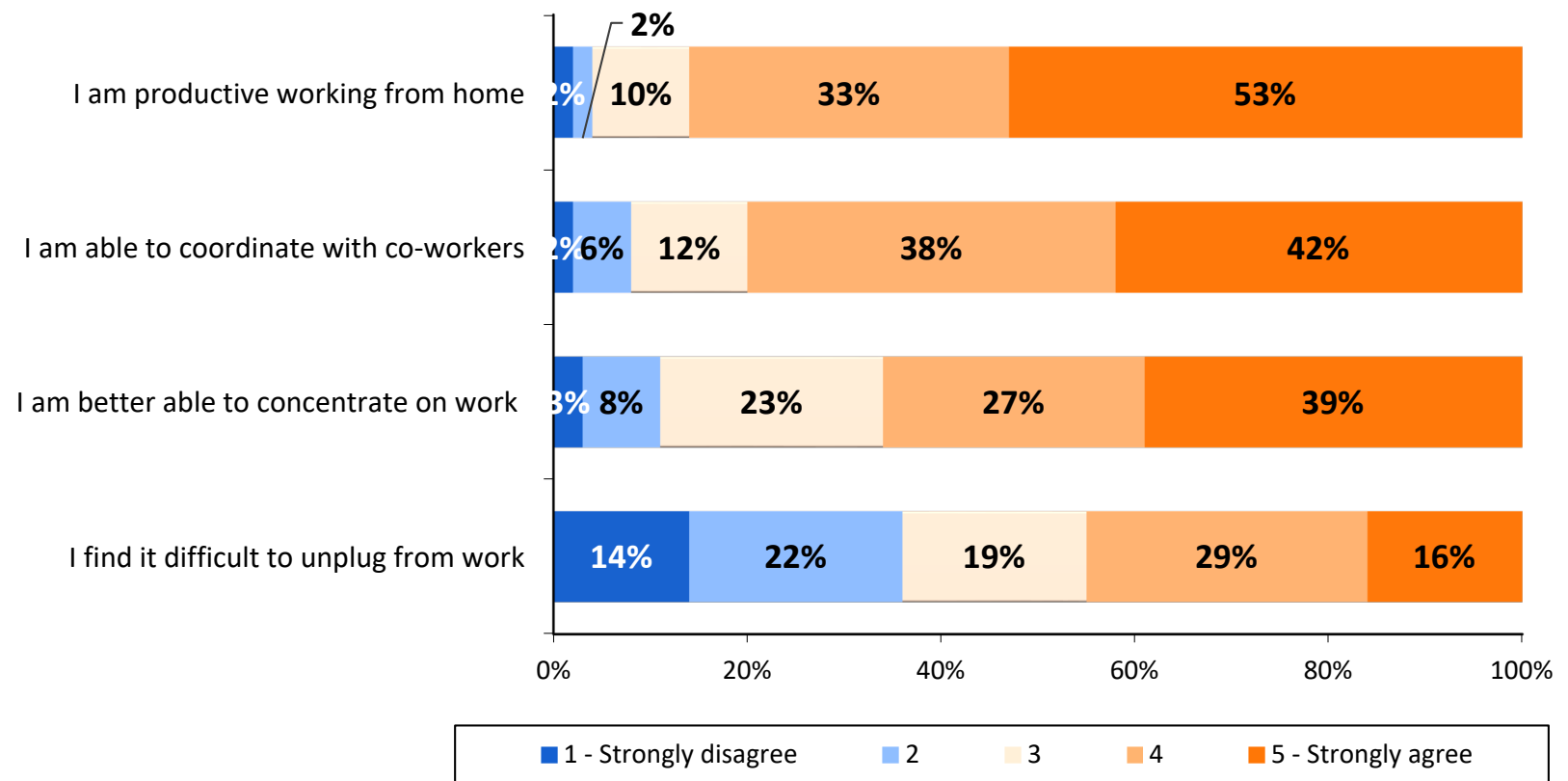
Q14e Considering your job responsibilities, how often would you be able to work remotely at home or at another location other than your main workplace?

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

Work from Home Was a Positive Experience for Most Teleworkers

86% agreed they were productive working from home, 80% were able to coordinate with co-workers, and 66% said they were better able to concentrate on work.

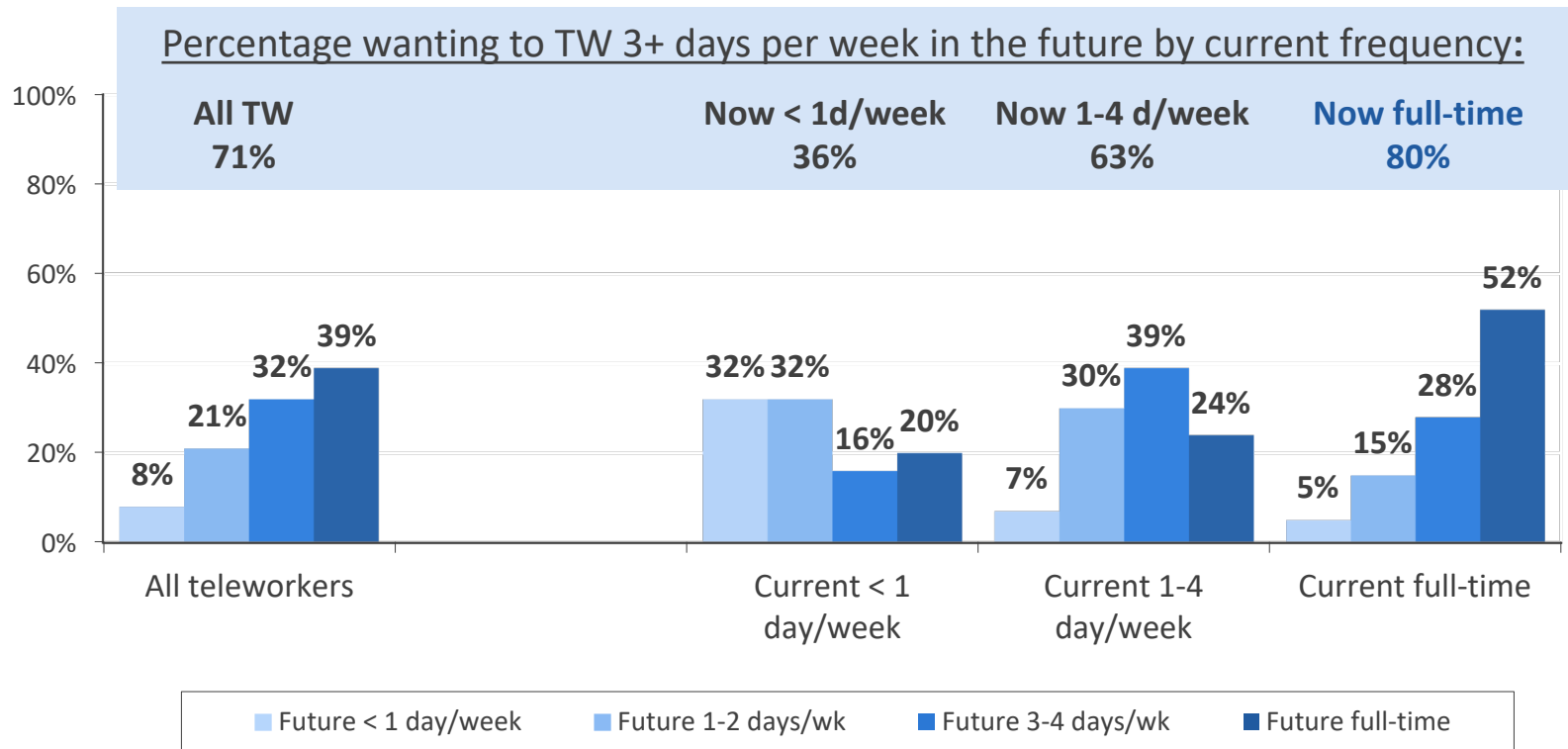
About four in ten found it difficult to unplug from work, but one-third disagreed, so it was not an issue for all teleworkers.



Q41. How strongly do you agree or disagree with the following statements about your experience working from home? Please rate each statement on a scale from 1 to 5, where 1 means you “strongly disagree” with the statement and 5 means you “strongly agree.”

92% of Current Teleworkers Would Like to Telework at Least One Day per Week in the Future and 71% Want to TW 3+ Days/Week

Teleworkers who TW frequently now are most interested in frequent future TW



NOTE: Some workers who teleworked early in the pandemic have returned to outside work locations. They might not have been as interested in teleworking as shown above.

Q12. Currently, how often do you usually telecommute/telework for an entire workday?

Q44. If given a choice by your employer, how often would you want to telecommute/telework in the future?

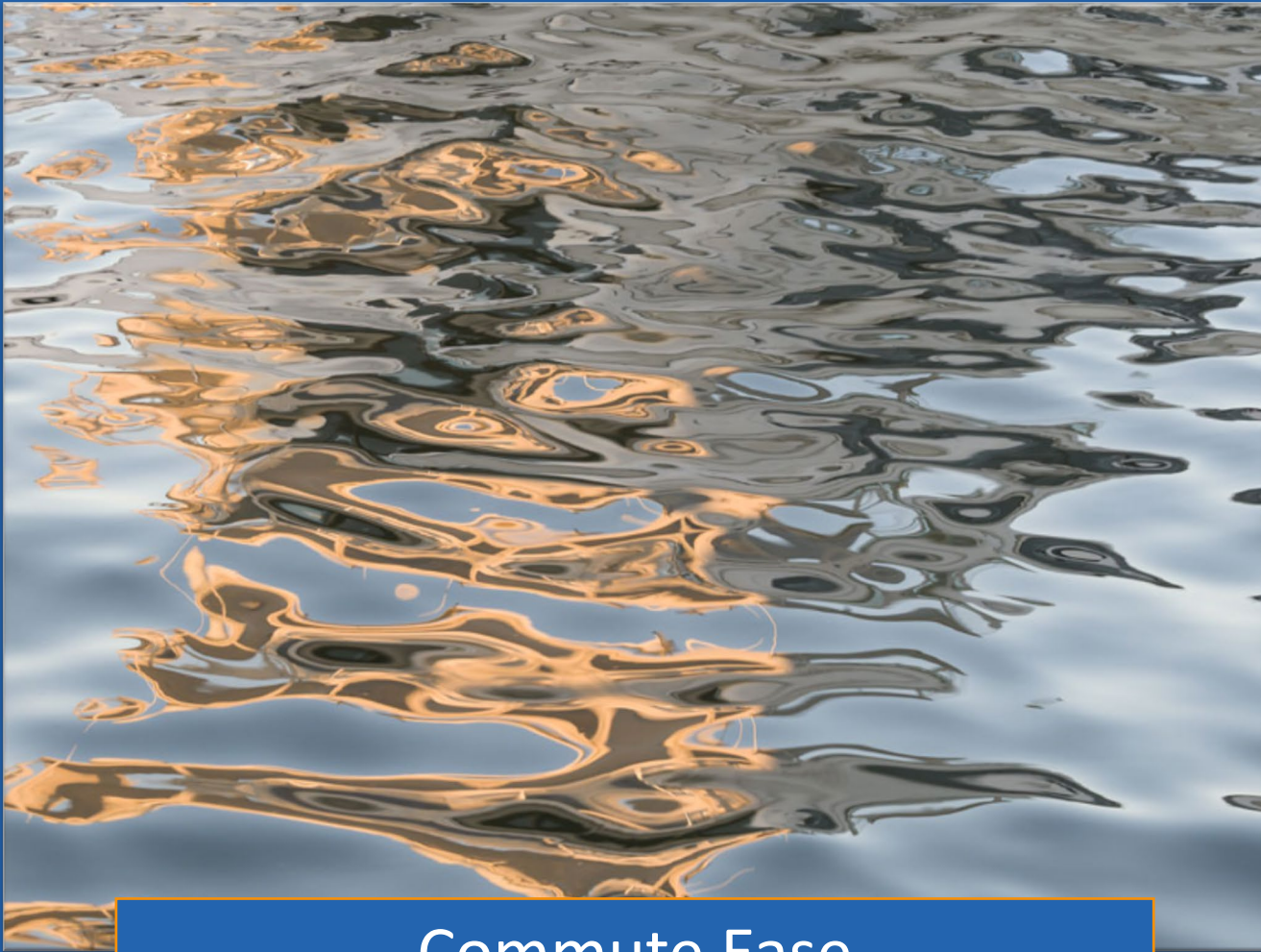
All teleworkers
n = 5,495

Current TW Frequency

< 1day/wk
n = 263

1-4 day/wk
n = 2,172

Full-time
n = 2,979



Commute Ease and Satisfaction

52% of 2022 Respondents Were Satisfied with their Commute, About the Same as in 2019 (50%)

Core area residents were more satisfied (60%) than were Middle Ring (54%) or Outer Ring (45%) residents; Satisfaction dropped as travel time increased.

Satisfied by Travel Time

- 1-10 min – 91%
- 11-20 min – 79%
- 21-30 min – 59%
- 31-45 min – 40%
- 46-60 min – 28%
- > 60 min – 17%

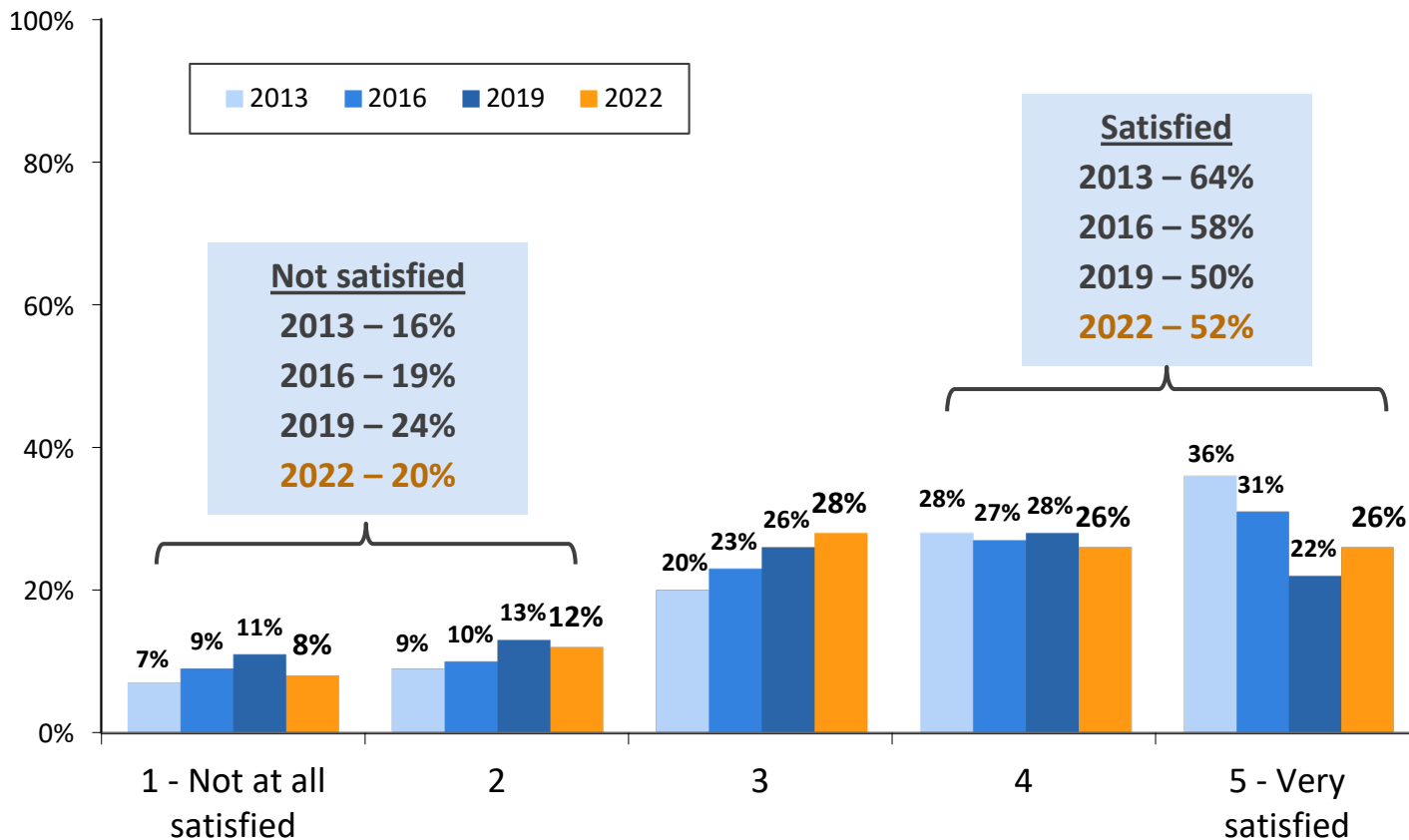
2013 SOC
n = 5,692

2016 SOC
n = 5,217

2019 SOC
n = 7,911

2022 SOC
n = 5,131

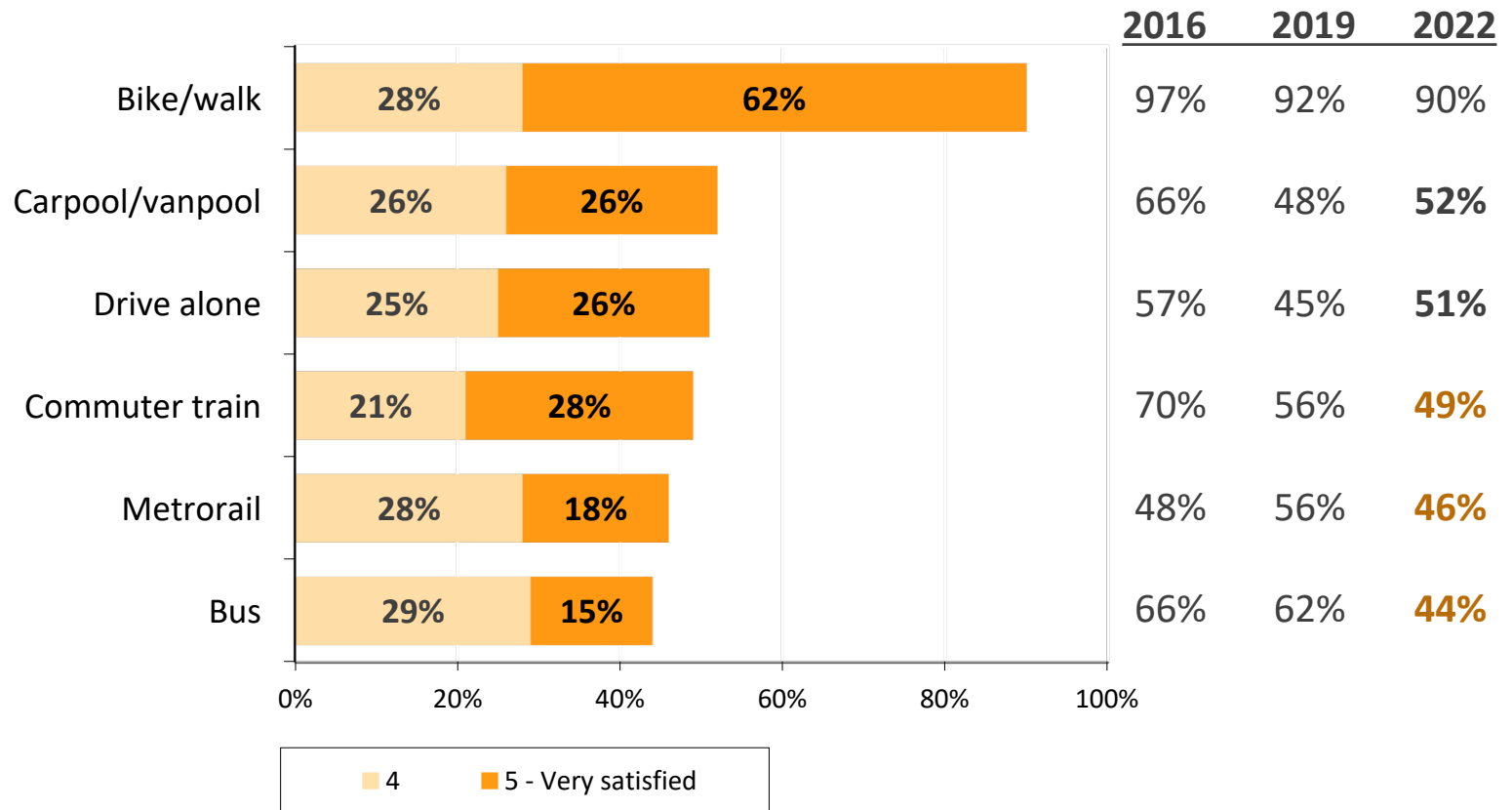
2022 base includes only workers who travel to outside work location 1 or more days per week



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

Bikers/Walkers Were Most Satisfied with Their Commute; Metrorail and Bus Riders Were Least Satisfied

Commuters who carpooled/vanpooled or drove alone reported higher satisfaction in 2022 than in 2019. Transit riders were LESS satisfied in 2022.



Bike/walk
n = 190

CP/VP
n = 119

Drive alone
n = 3,364

Commuter
train
n = 47

Metrorail
n = 393

Bus
n = 209

Excludes
SEWAH and
full-time
teleworkers

Q15. In a typical work week, what type of transportation do you use on each of the days you work?
Q56f. Overall, how satisfied are you with your trip to work?

In 2022, 26% of Commuters Said Their Commute Was More Difficult than a Year Ago But 24% Said It Was Easier

Commutes were more difficult for 33% of Core area residents in 2022 vs 25% for Middle and Outer Ring residents, the opposite of the 2019 results.

Commutes also got worse for transit riders: Bus (42%) and Train (50%) riders had more difficult commutes versus Drive alone (23%) and CP/VP (27%)

More Difficult Commute

2022

Core-33%

Mid-Ring-24%

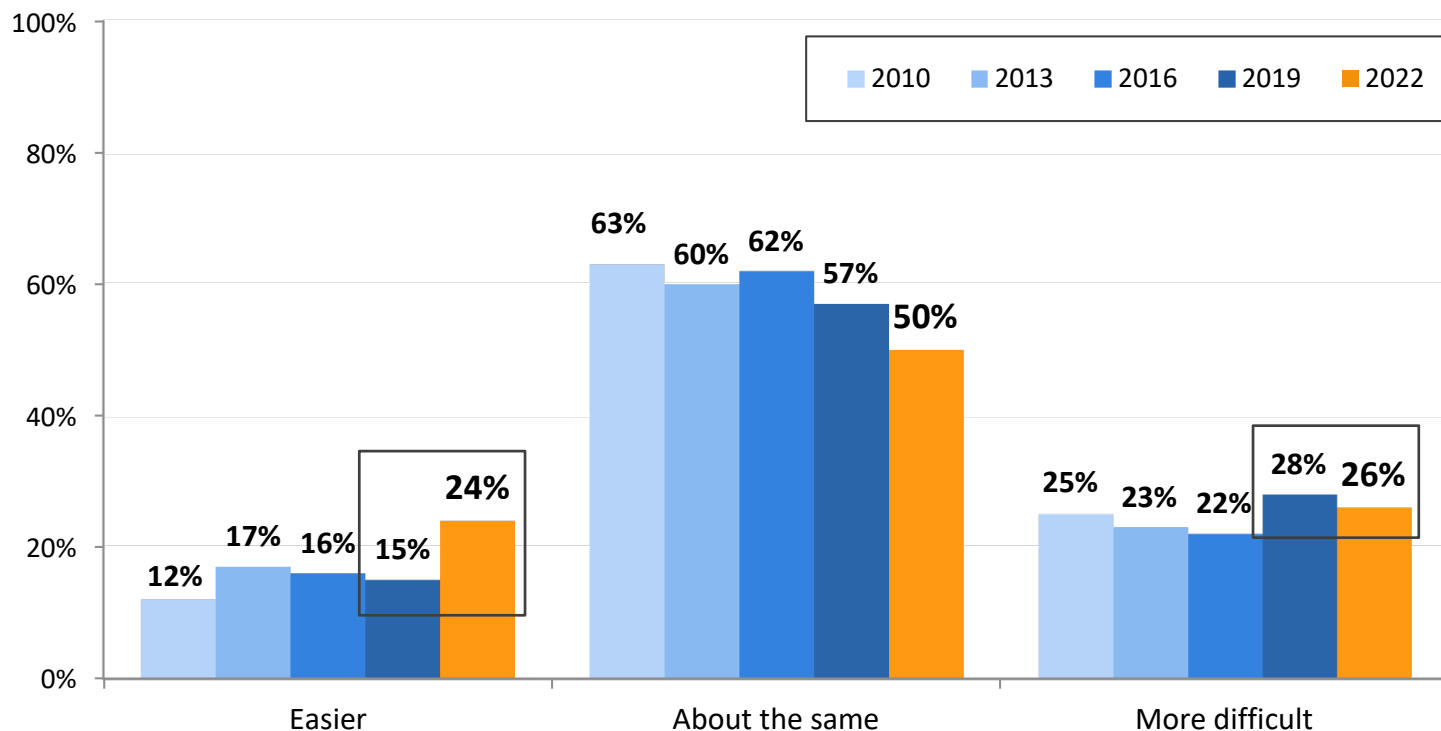
Out-Ring-25%

2019

Core-21%

Mid-Ring-26%

Out-Ring-40%



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

2010 SOC
n = 6,049

2013 SOC
n = 5,717

2016 SOC
n = 5,142

2019 SOC
n = 7,787

2022 SOC
n = 5,067

67% of Commuters who Changed Home/Work Location Considered Commute Factors – More than in 2019 (52%)

29% said commute ease was more important than other factors in the decision.

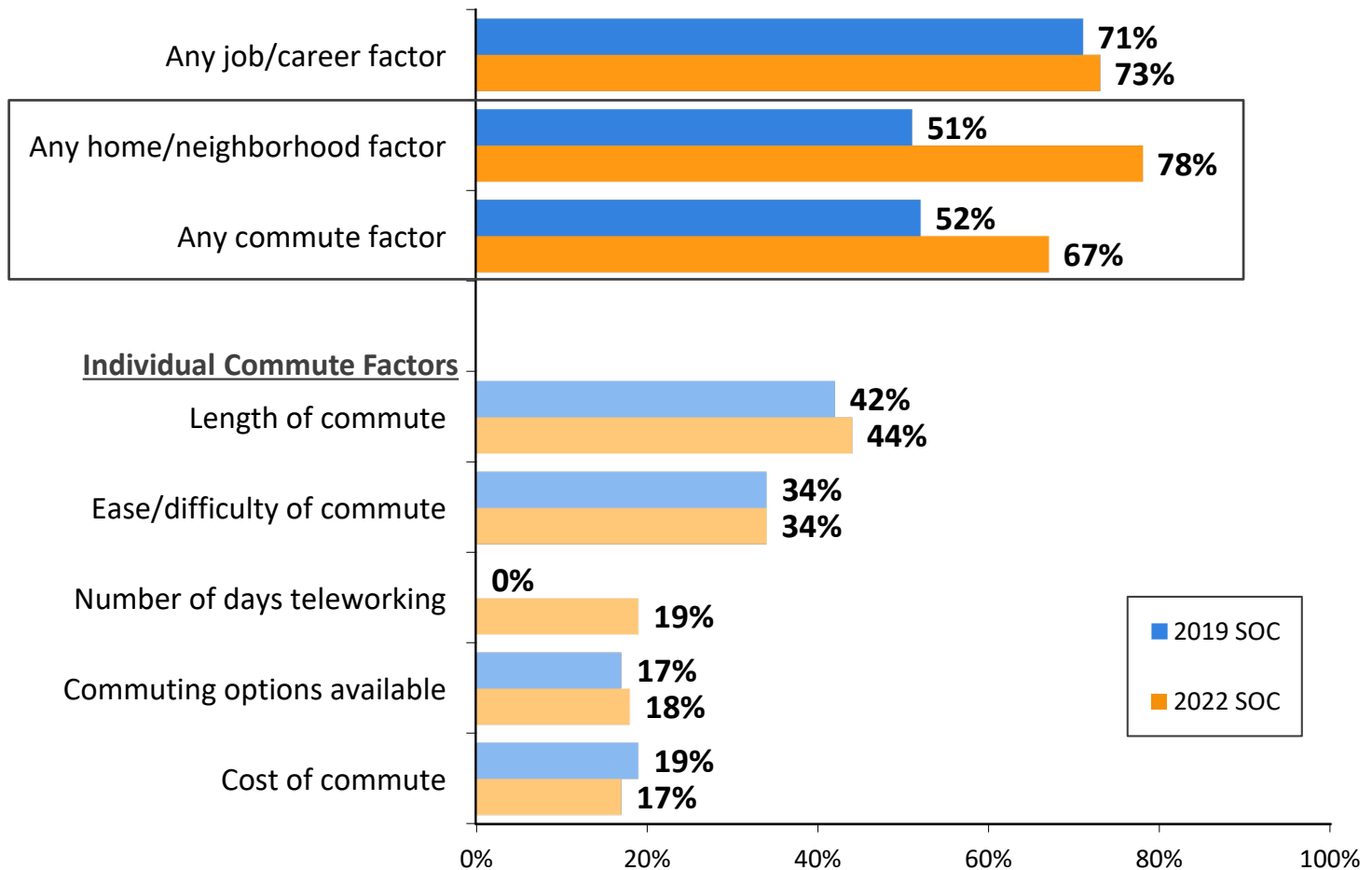
Moved Home and/or Work

2019

Home – 18%
Work – 20%

2022

Home – 28%
Work – 19%



Q59. Have you changed your work location in the last two years? (NOTE: not asked of full-time teleworkers)

Q60. Have you moved to a different residence in the last two years?

Q60b - What factors did you consider in your decision to make this home or work location change?

Respondent made home/work change

2019 SOC
n = 2,013

2022 SOC
n = 2,657

52% of Commuters who Moved Home/Work Considered Access to Transportation Services at the New Location – 2019 (53%)

Most likely to consider availability: Younger than 35 years, Limited access to personal vehicle, Use alt mode to commute, Live/work in Core

Considered Access

Home Area

Core – 74%

Middle Ring – 50%

Outer Ring – 31%

Work Area

Core – 69%

Middle Ring – 40%

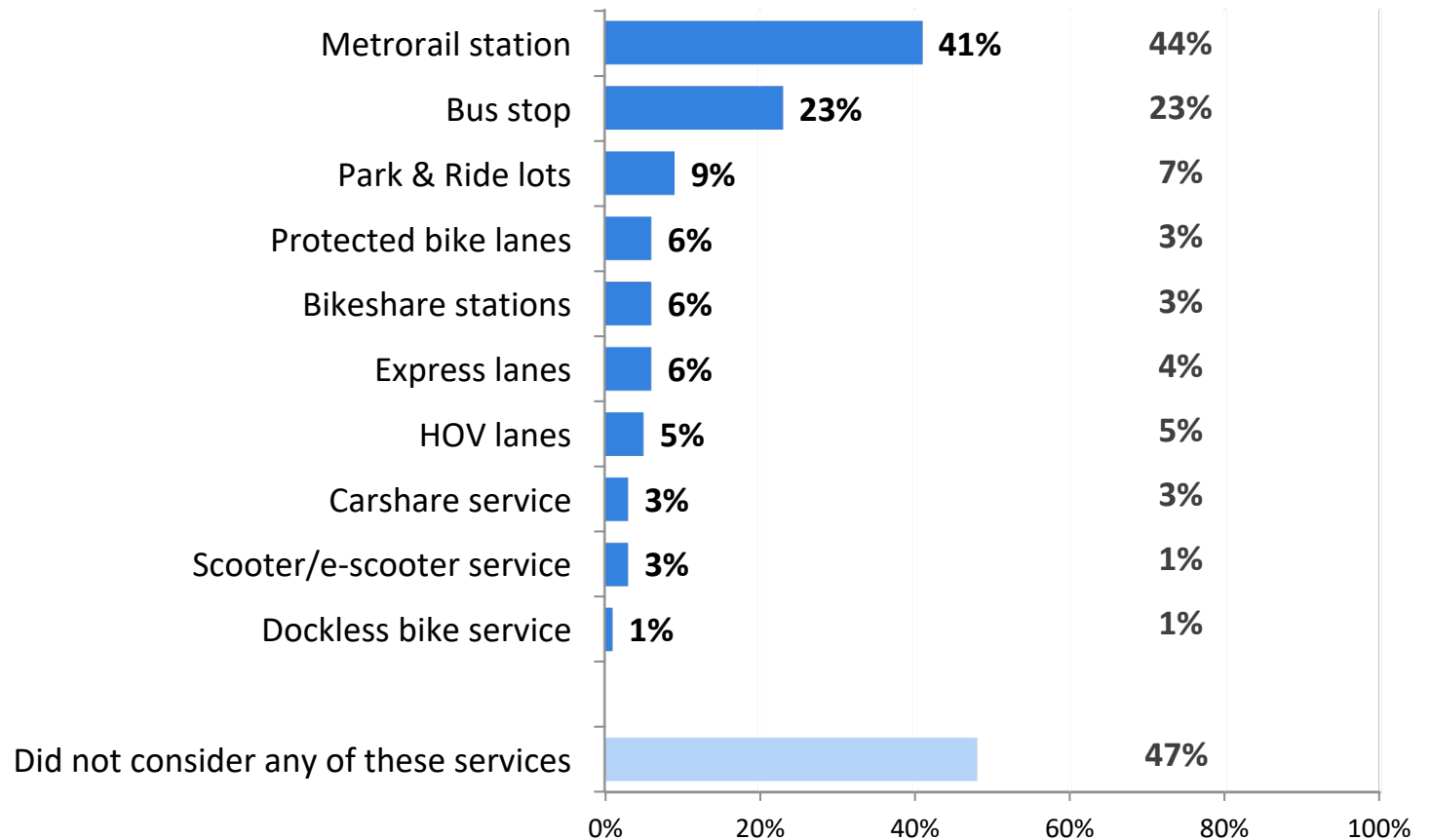
Outer Ring – 22%

Respondent made home/work change

2019 SOC
n = 2,013

2022 SOC
n = 2,697

2019 SOC



Q59. Have you changed your work location in the last two years?

Q60. Have you moved to a different residence in the last two years?

Q60g. When you were considering making this change, did you consider how close your new location would be to the following transportation services?



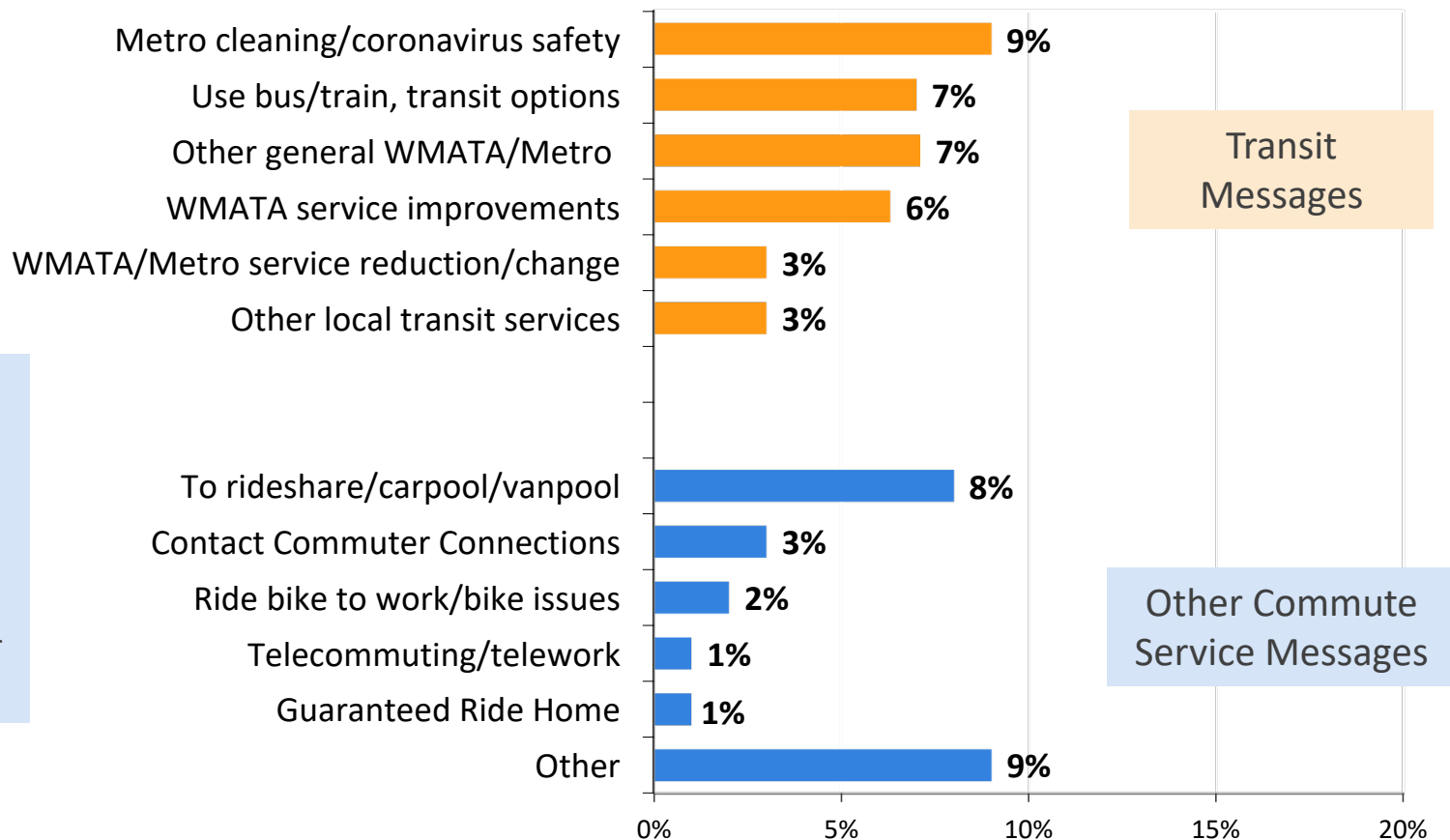
Ad Awareness/Regional and Local
Commute Services

27% of Respondents Recalled Hearing/Seeing Commute Ads in the Past Year – Well Below the 2019 Rate (45%)

Was the drop due to lower ad exposure or lower relevance for teleworkers?

About half who were aware of ads could name a specific message.

Transit messages dominated, some messages related to pandemic impacts.



Ad Sponsor

25% named WMATA

6% named Commuter Connections or COG

34% of Respondents who Recalled Messages Took an Action to Try to Change their Commute

16% who knew ads tried or started using an alternative mode for their commute, higher than the 10% who made a mode change in 2019

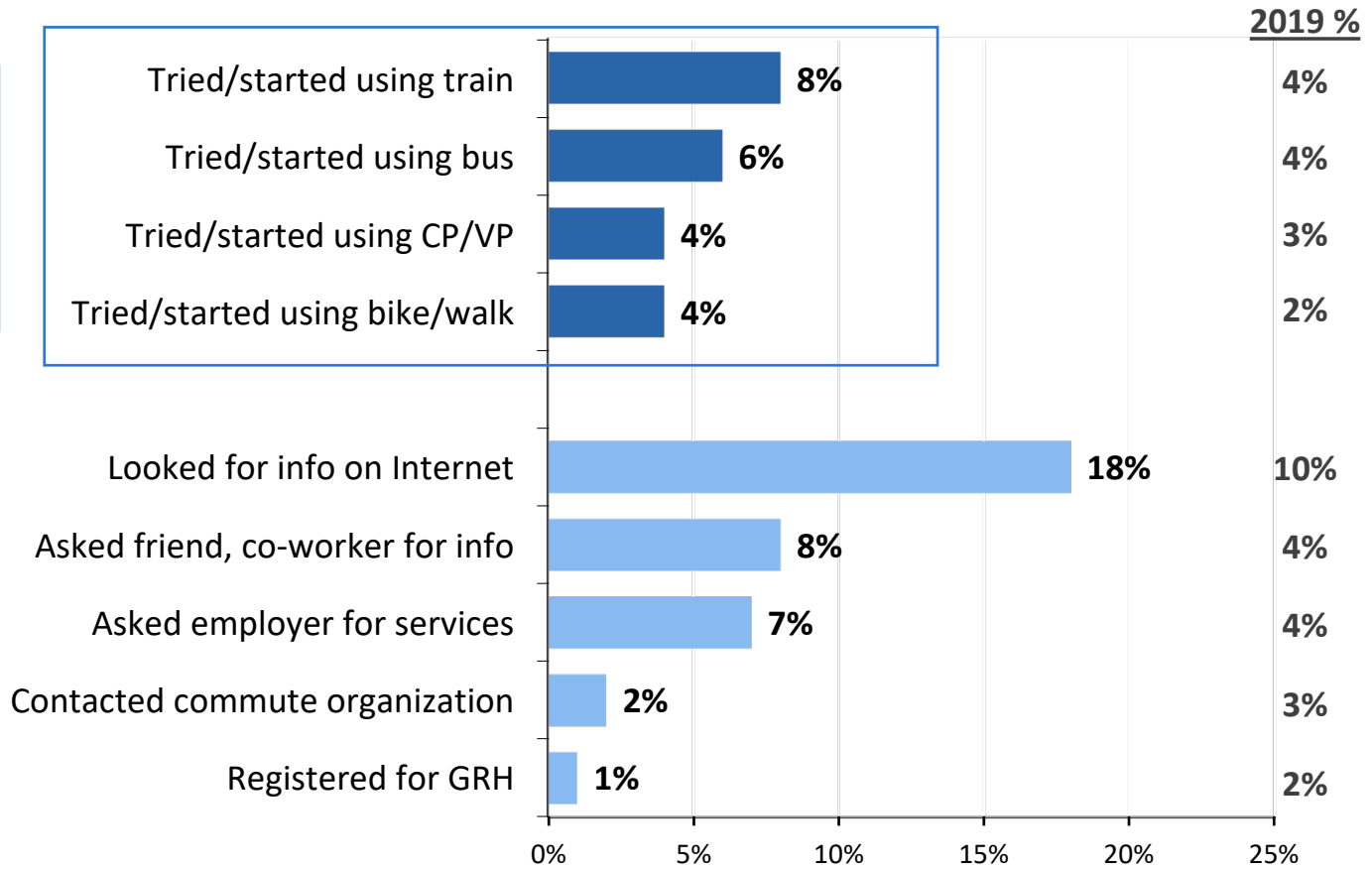
Tried/started alt mode for commute:

16% in 2022

vs

10% in 2019

35% who took action said the ad encouraged the action



n = 687

Base is commuters who heard/saw ads and commuted to outside work locations

Q66/67 Q66. After seeing or hearing this advertising, did you take try/start using any of the following forms of transportation for your trip to work or increase how often you use them; Q67. Did you take any other actions to try to change how you get to work? Q68. Did the advertising you saw or heard encourage you to take this action?

32% of Commuters Said a Commute Information Phone Number, Website, or Mobile App Existed; 47% Were “Not Sure”

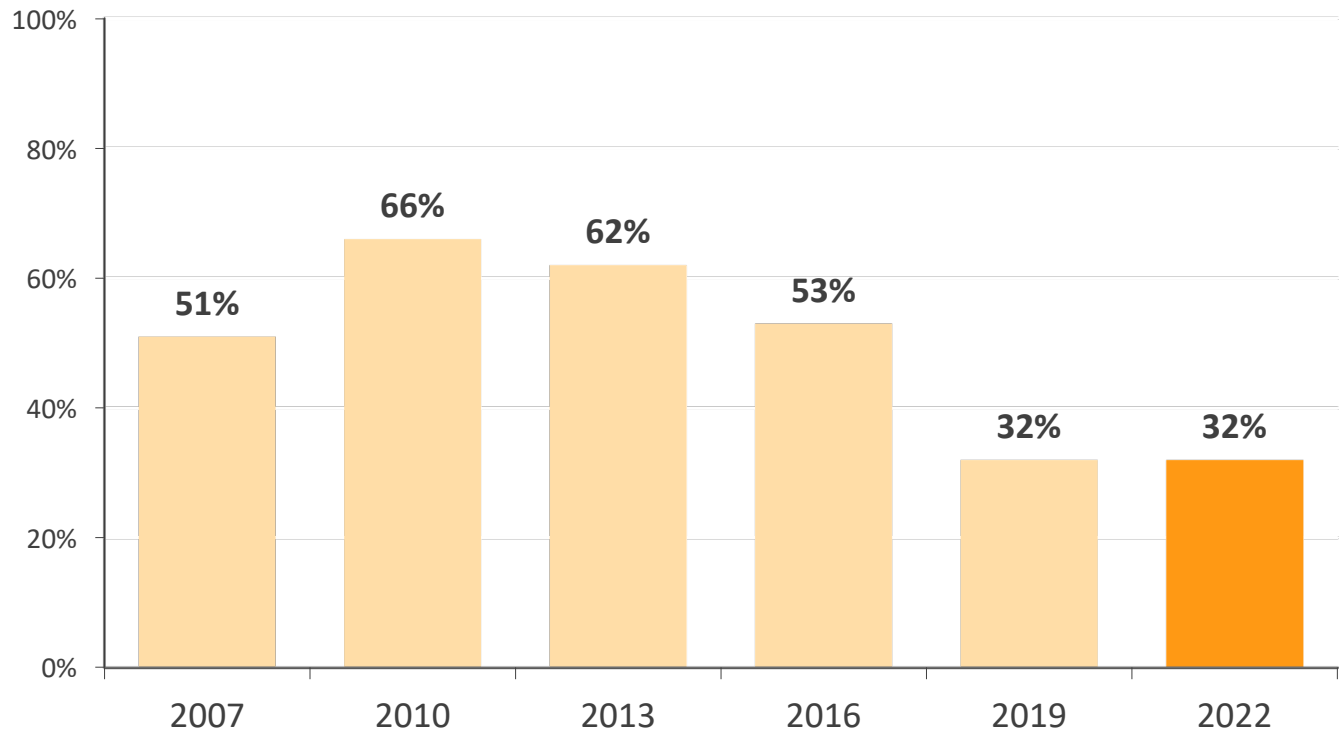
Awareness of info resources fell between 2010-2019, but stabilized in 2022. Awareness in 2022 was highest for commuters who lived in the Core, worked in the Core, traveled long distances, and used alternative modes for commuting

Used regional commute info source in past year:

2022 – 11%

2019 – 12%

2016 – 22%



2007 SOC
n = 6,600

2010 SOC
n = 6,629

2013
n = 6,335

2016 SOC
n = 5,903

2019 SOC
n = 8,236

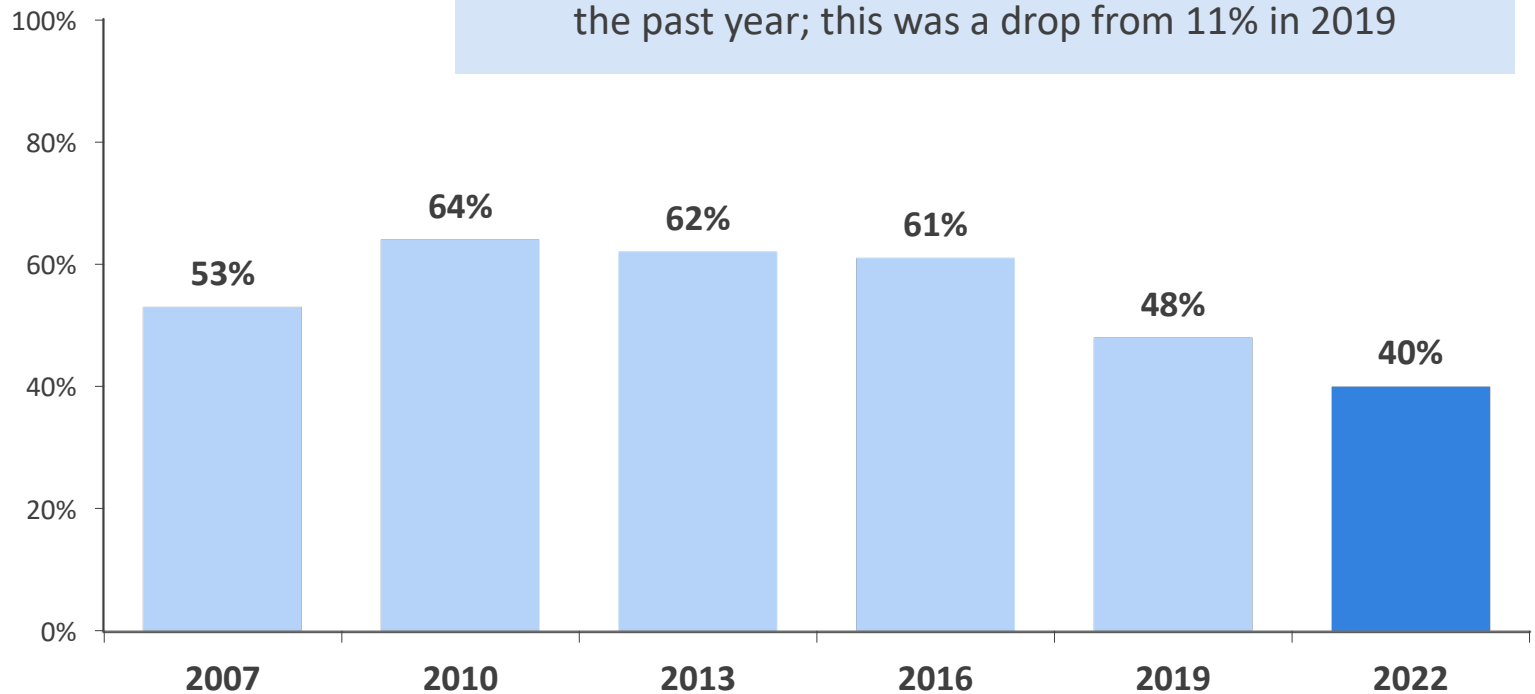
2022 SOC
n = 8,359

- Q81 Is there a phone number, website, or mobile app you can use to obtain information on carpooling or vanpooling, public transportation, HOV lanes, toll/express lanes, and telecommute/telework in the Washington region?
- Q82 Have you used this number, website, or mobile app in the past year?

40% of Regional Commuters Knew of Commuter Connections; a Drop from 2019, But Still Overall High Regional Awareness

About 5% of commuters who knew of Commuter Connections contacted the organization – this equals 71,600 commuters assisted (2% of all regional commuters).

5% of respondents who knew about Commuter Connections contacted the program or used its website in the past year; this was a drop from 11% in 2019



2007 SOC
n = 6,600

2010 SOC
n = 6,629

2013 SOC
n = 6,335

2016 SOC
n = 5,903

2019 SOC
n = 8,227

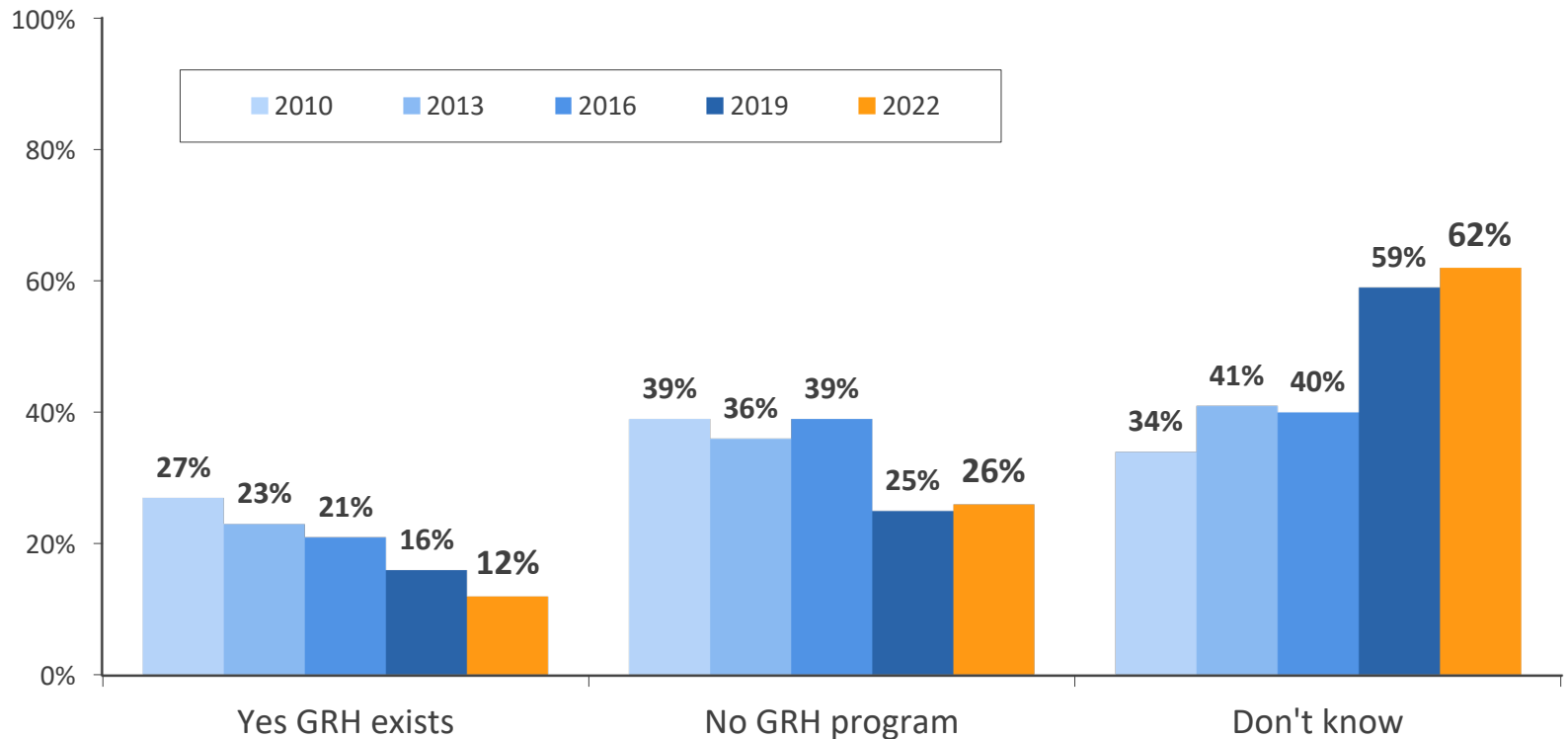
2022 SOC
n = 8,377

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

Q88a. Have you contacted Commuter Connections in the past year or visited a website sponsored by this organization?

12% of Commuters Knew There was a Regional GRH Program; 26% Said No Program, 62% Did Not Know

Awareness of GRH has declined since 2010, when 27% knew of the program. Of commuters who said GRH existed, 17% named Commuter Connections as the sponsor; 68% did not know the sponsor



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 carpool, vanpool, public transportation, or bicycle to work?

2010 SOC
n = 6,084

2013 SOC
n = 5,738

2016 SOC
n = 5,266

2019 SOC
n = 7,974

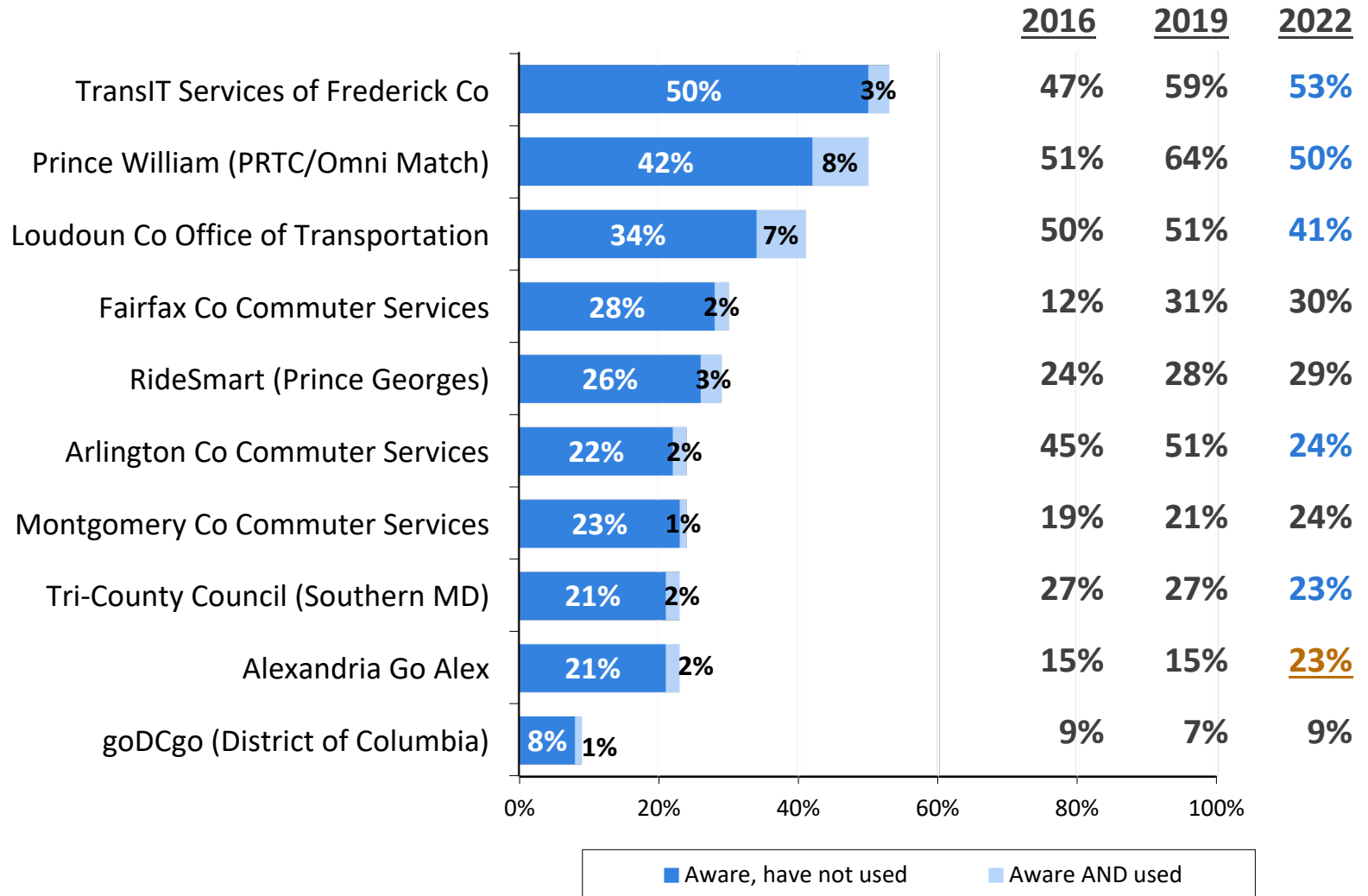
2022 SOC
n = 5,279

Awareness of Local Commute Services Ranged from 9% to 53%

Awareness increased for one program and declined for five programs in 2022

Use of local commute services ranged from 1% to 8%

- Frederick
n = 652
- Prince William
n = 726
- Loudoun
n = 700
- Fairfax
n = 1,746
- Prince George's
n = 1,141
- Arlington
n = 1,369
- Montgomery
n = 1,316
- So. Maryland
n = 1,218
- Alexandria
n = 921
- District of Columbia
n = 3,111



Q88d. Have you heard of the following organization(s) or services(s)? If so, have you contacted them in the past year or visited their websites?

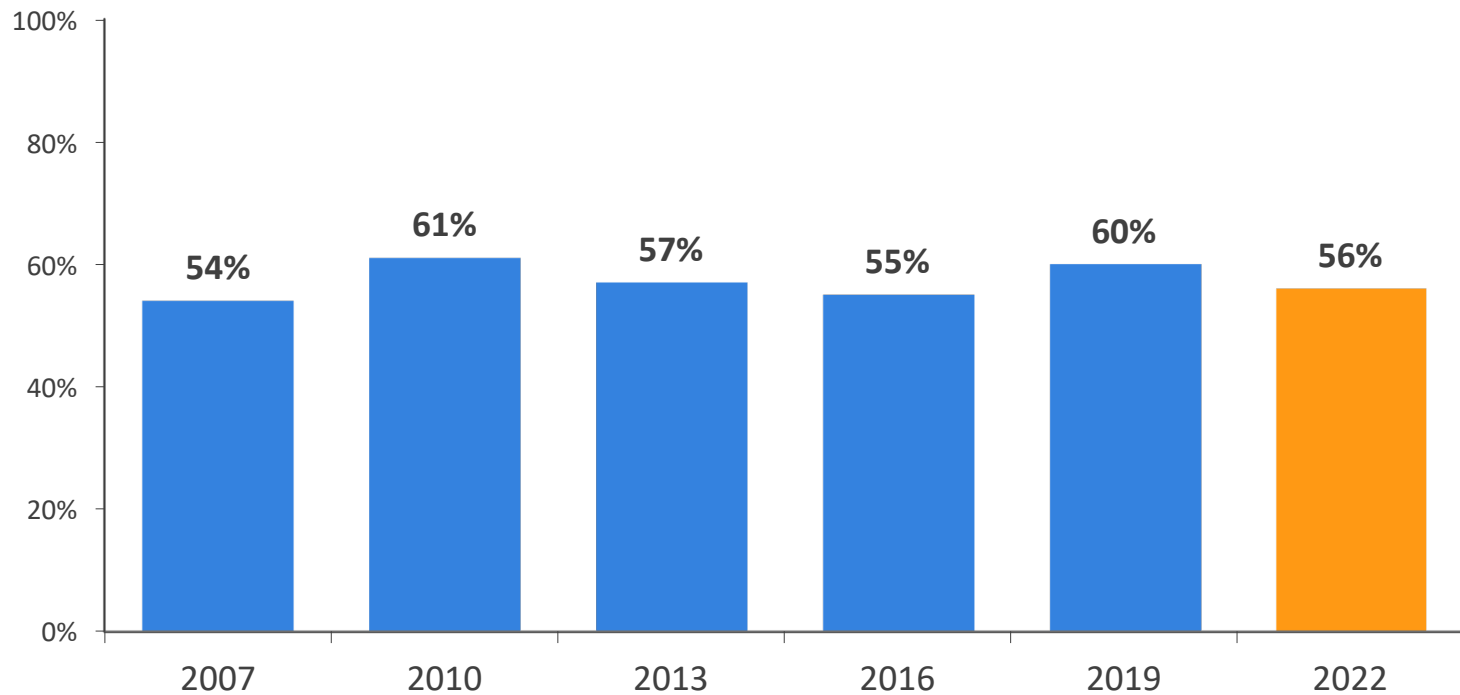


Employer Services



56% of Respondents Said their Employers Offered Commute Services at the Workplace

Availability was slightly lower in 2022 than in 2019 (60%); Did some employers pause or reduce services during the pandemic OR are employees less aware of services because they telework some or all workdays?



2007 SOC
n = 6,071

2010 SOC
n = 5,899

2013 SOC
n = 5,524

2016 SOC
n = 5,086

2019 SOC
n = 7,991

2022 SOC
n = 7,859

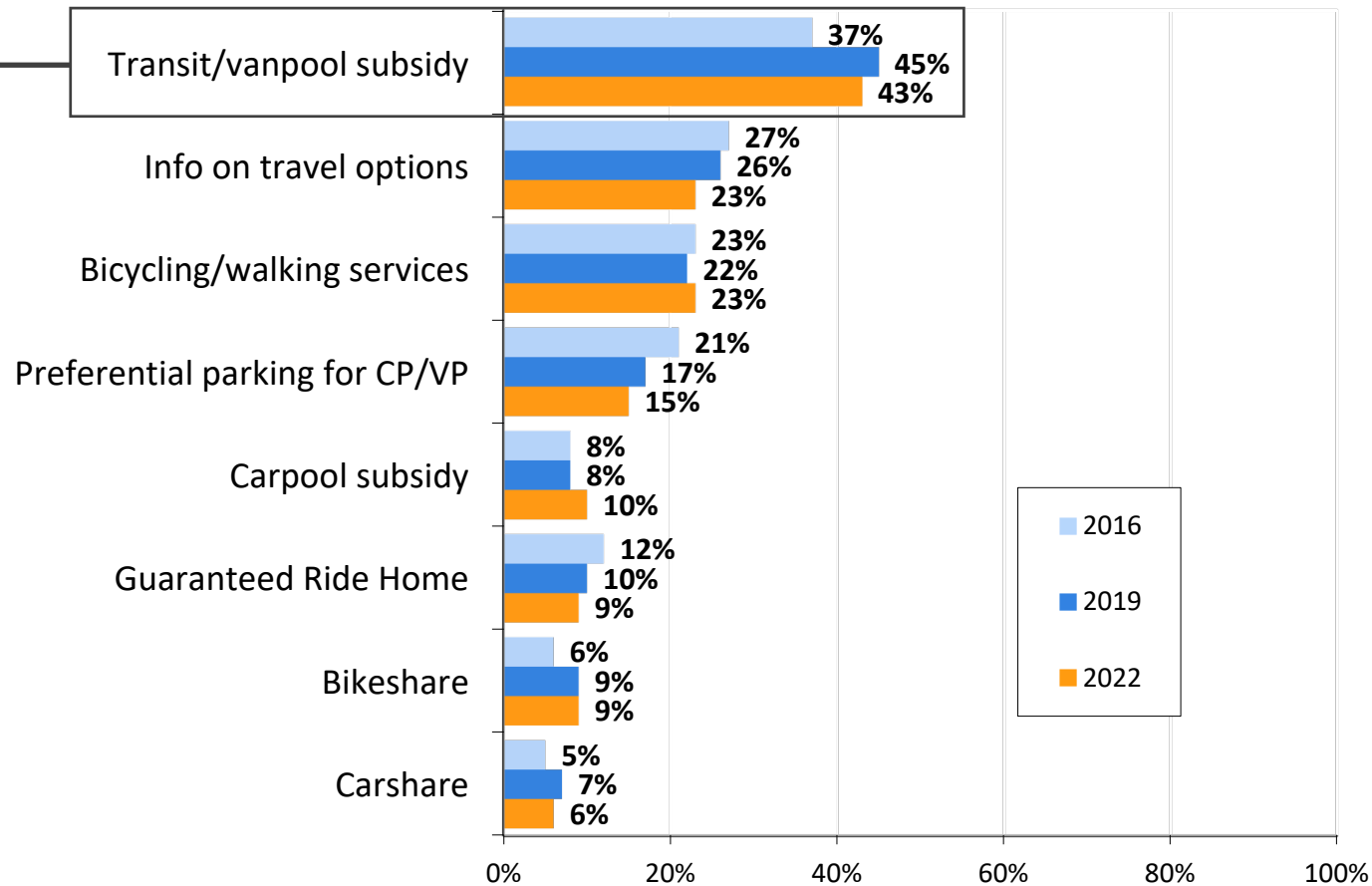
Q89 Does your employer make any of the following commuter services or benefits available to you to help with your commute, and if so, have you used them?

Transit/Vanpool Subsidy Was Most Widely Available Service in 2022 (43% of Respondents)

Availability of most services was not statistically different than in 2019

Transit/Vanpool Subsidies

- 32% Pre-tax deduction (employee-paid)
- 32% Direct cash payment (employer-paid)
- 3% SmarTrip card or voucher
- 33% Unknown



2016 SOC
n = 5,086

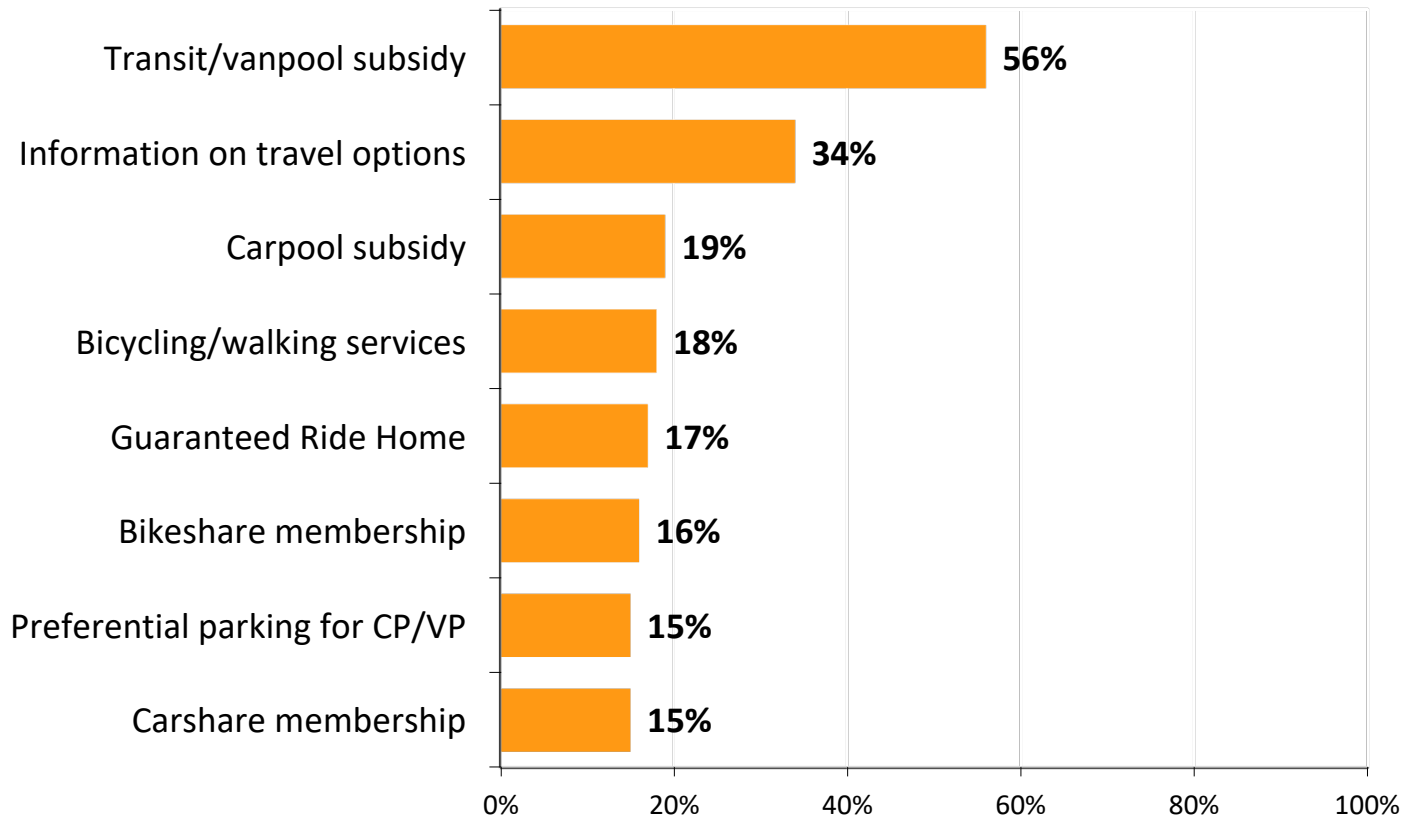
2019 SOC
n = 7,991

2022 SOC
n = 7,859

Q89 Does your employer make any of the following commuter services or benefits available to you to help with your commute, and if so, have you used them?
Q89b. Which of the following best describes the transit or vanpool benefit that is available to you?

Transit/VP Subsidy Also Was Most Widely USED Employer Service – by 56% of respondents with access to the service

34% with access used travel option info and 19% used carpool subsidy; other services used by about two in ten with access



Transit/van pool subsidy
n = 3,433

Info on travel options
n = 1,878

Carpool subsidy
n = 771

Bike/walk services
n = 1,893

Preferential parking
n = 1,292

Bikeshare
n = 744

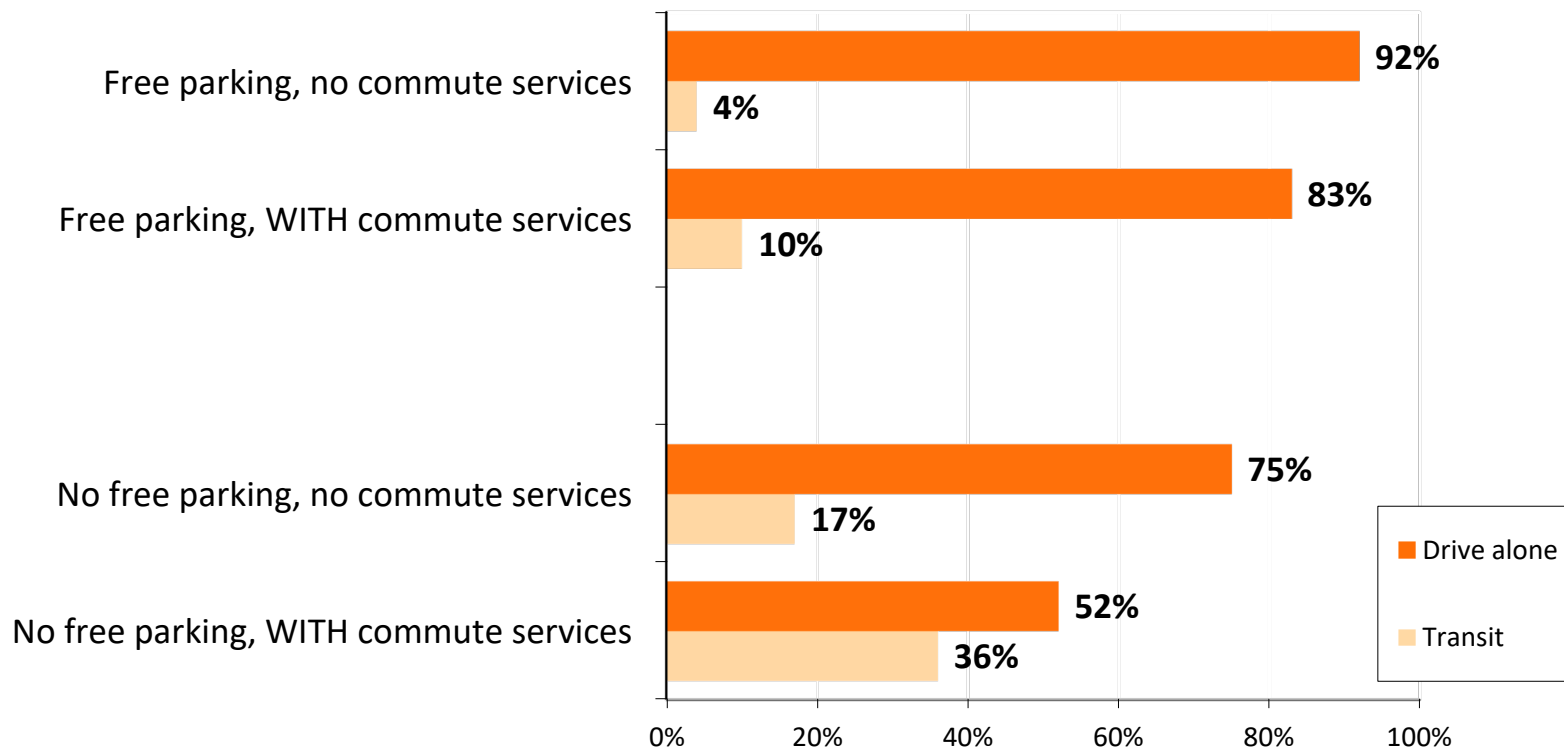
GRH n = 776

Carshare
n = 431

Q89 Does your employer make any of the following commuter services or benefits available to you to help with your commute, and if so, have you used them?

Drive Alone Was Lower at Worksites Where Parking was NOT Free and Commute Services WERE Offered

Both parking charges and commute services seemed to have a role in mode use but many other factors also would be relevant



Free parking, no commute services
n = 1,320

Free parking with commute services
n = 1,541

No free parking, no commute services
n = 444

No free parking, with commute services
n = 1,083

Q89 Does your employer make the following commuter services/benefits available to you to help with your commute, and if so, have you used them?
Q90 Does your employer make free on-site parking available to all employees at your worksite?



Questions?

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