

Commuter Connections TDM Evaluation Project 2019 State of the Commute Survey

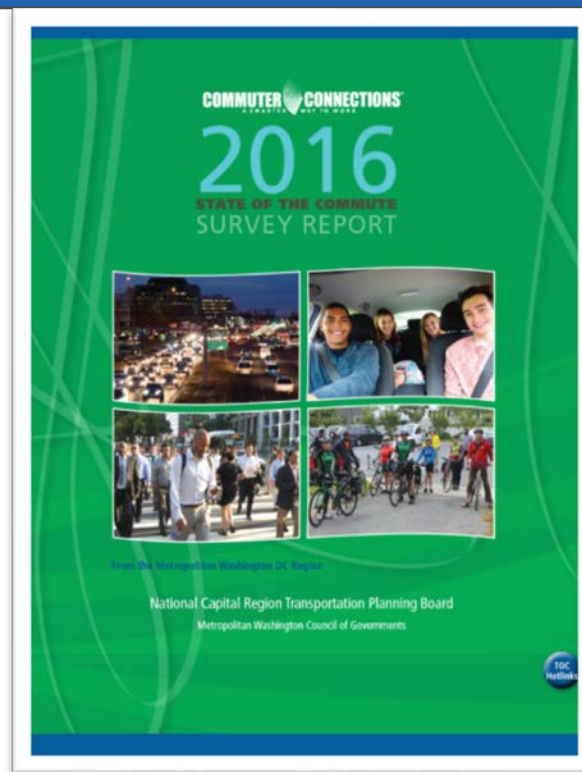
Highlight Results

July 16, 2019

LDA Consulting

with

ESTC, CIC Research, CUTR





SOC
Methodology

Survey Methodology

- Seventh triennial survey (2001, 03, 06, 10, 13, 2019)
- Interviewed 8,246 employed residents of COG region (95% ± 1.1%)
- Address-based sample (ABS) method – randomly-selected postal addresses received postcard in mail with link to Internet survey
- 7,808 Internet interviews ; 438 by telephone follow-up

Share your opinions and help improve commuting in the region



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

Residents who complete our survey *by the Response date* will be entered into a drawing for fifty \$250.00 Amazon gift cards.

Participate: Visit the website below and enter password 1 or password 2. A second employed household member 18 years or older may take the survey using the second password.

www.TravelToWork2019.org

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

Respond by
Feb 15

If you are unable to take the survey online, call toll-free 1-888-714-9846.

Para realizar la encuesta, seleccione la opción español en el sitio web.

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) 962-3200.

- Sample plan ensured at least 600 completes in each jurisdiction
- Jurisdiction counts ranged from 664 – 941 (95% ± 3.8 for smallest sample)
- County level results were expanded to match the regional population of workers
- Data also were weighted to adjust sample for race/ethnicity, and age

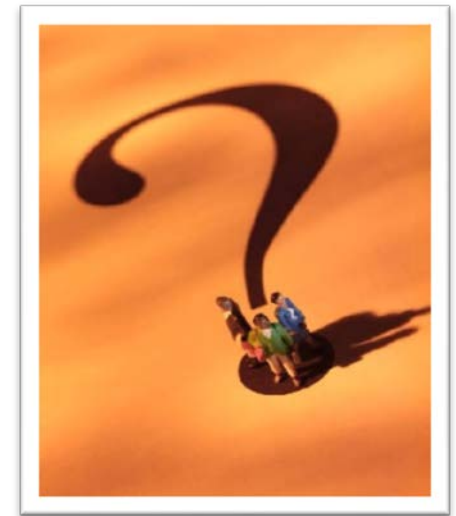
SOC Survey Topics

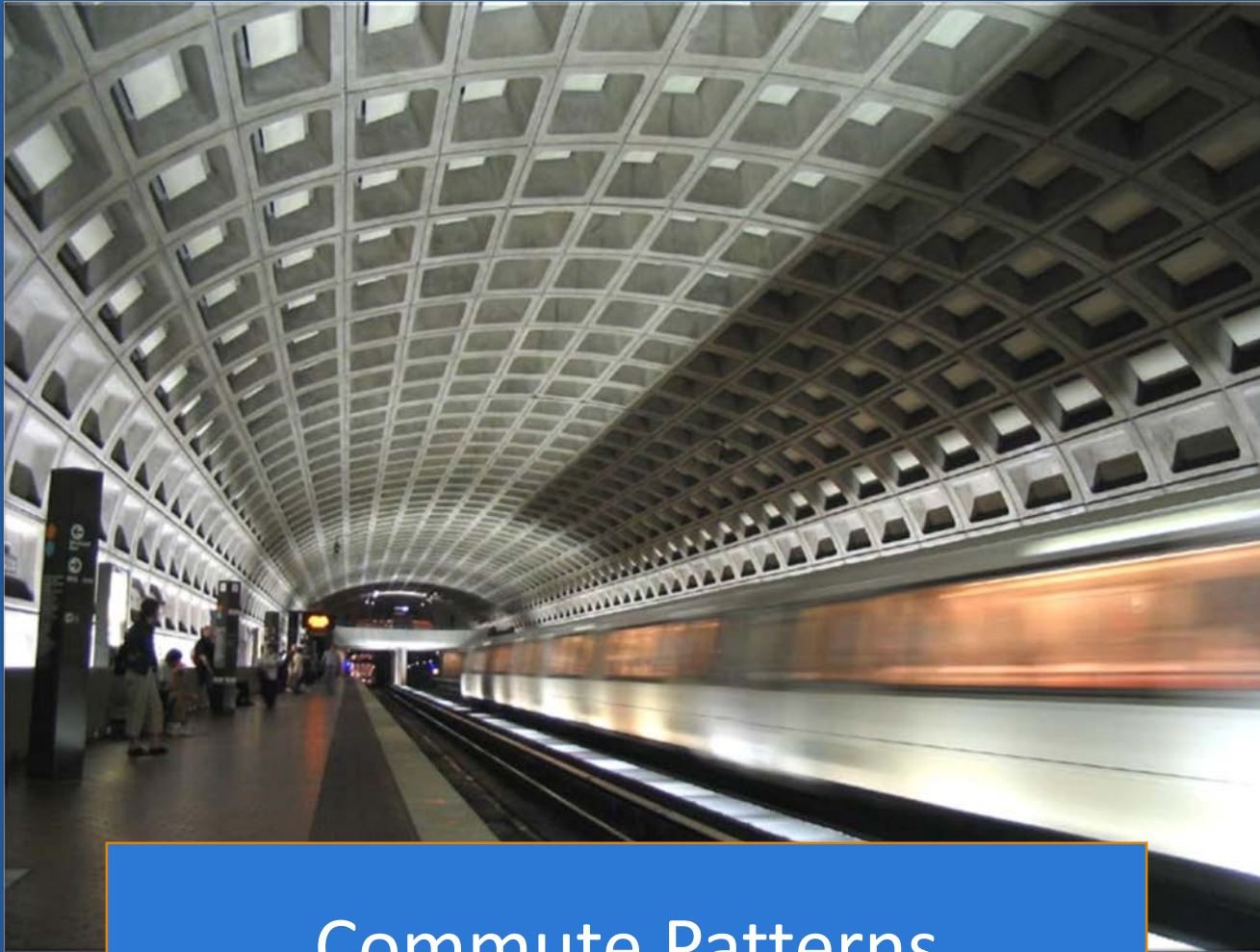
Continued tracking questions

- Current/past commute patterns
- Telework
- Access to transit, HOV/Express lanes, 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 2019

- Additional info on bikeshare/scooters and ride-hail
- Past use of transit among transit non-riders; why stopped
- Details of Express lane use (roads used, modes, changes made)
- Use of social networking and travel info apps
- Familiarity and interest in driverless cars





Commuter Patterns

58% of Commuters' Weekly Commute Trips Were Made by Driving Alone or Taxi/Ride-hail; 24% Were Made by Transit and 10% of Trips Were Eliminated by TW/CWS

Drive alone rates were much lower for both residents and workers in the "Inner Core" area than for Middle Ring/Outer Ring respondents

Drive Alone Rate

By Home Area

Inner Core – 37%

Middle Ring – 64%

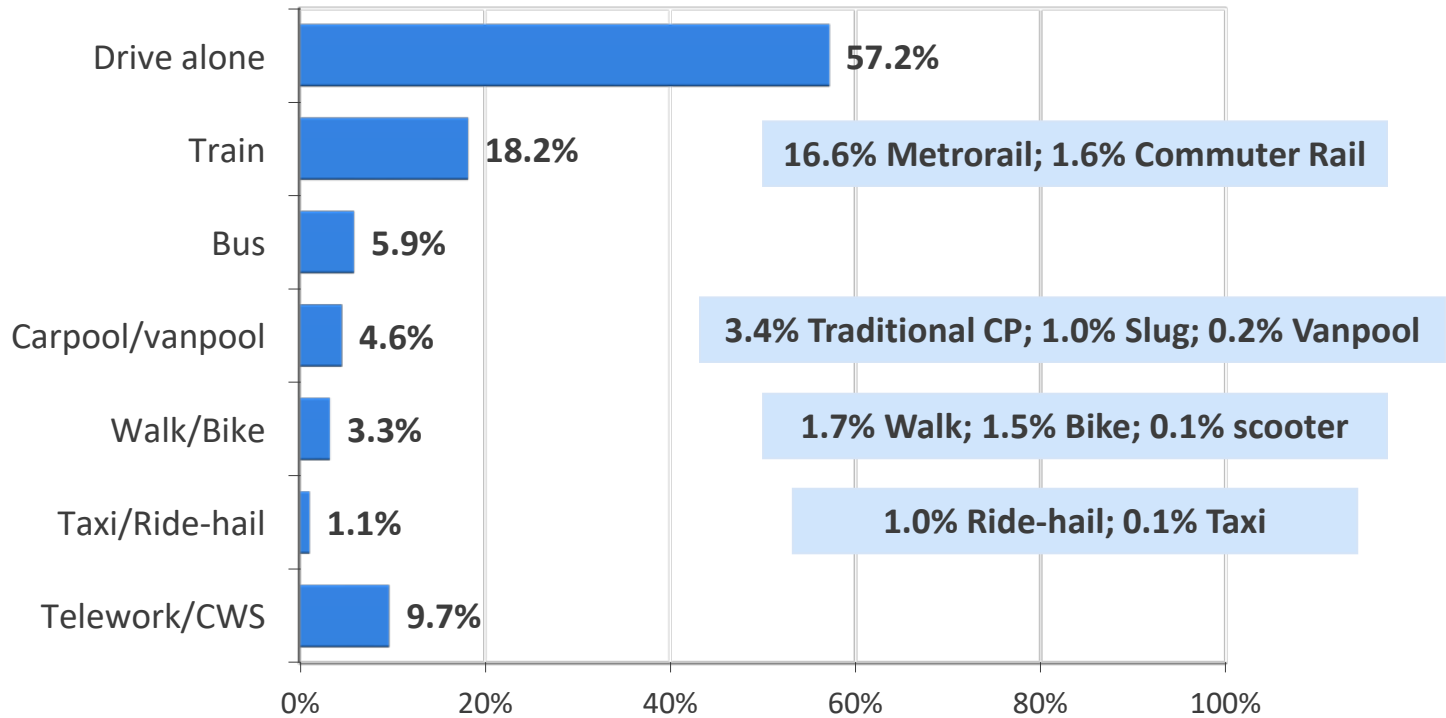
Outer Ring – 75%

By Work Area

Inner Core – 38%

Middle Ring – 78%

Outer Ring – 87%



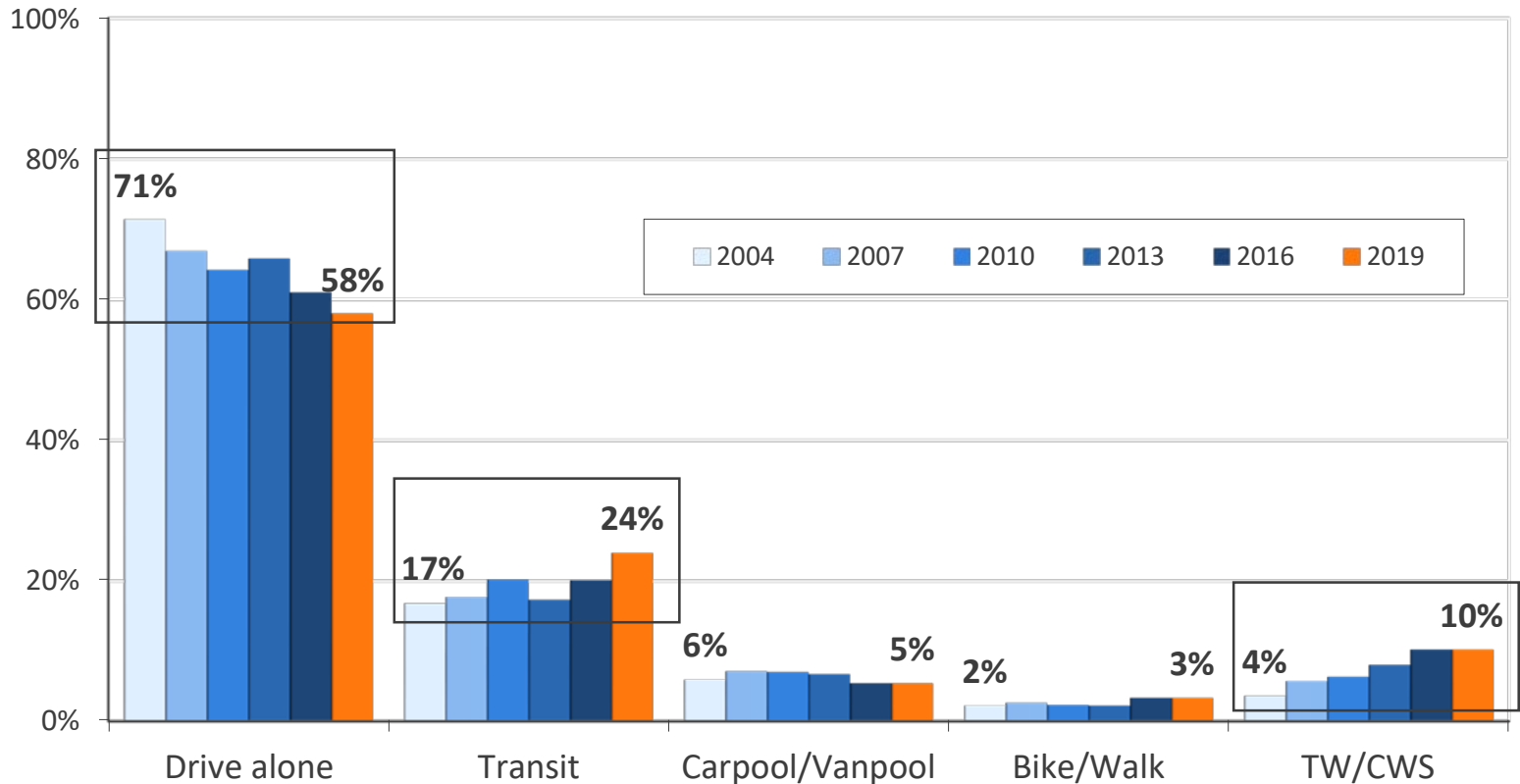
2019 SOC
n = 8,107

Excludes employees who are 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.

Between 2004 and 2019, the Drive Alone Percentage Fell 13 Points, from 71% to 58%

Telework and transit use increased; other modes remained steady



2004 SOC
n = 6,851

2007 SOC
n = 6,168

2010 SOC
n = 6,050

2013 SOC
n = 5,892

2016 SOC
n = 5,503

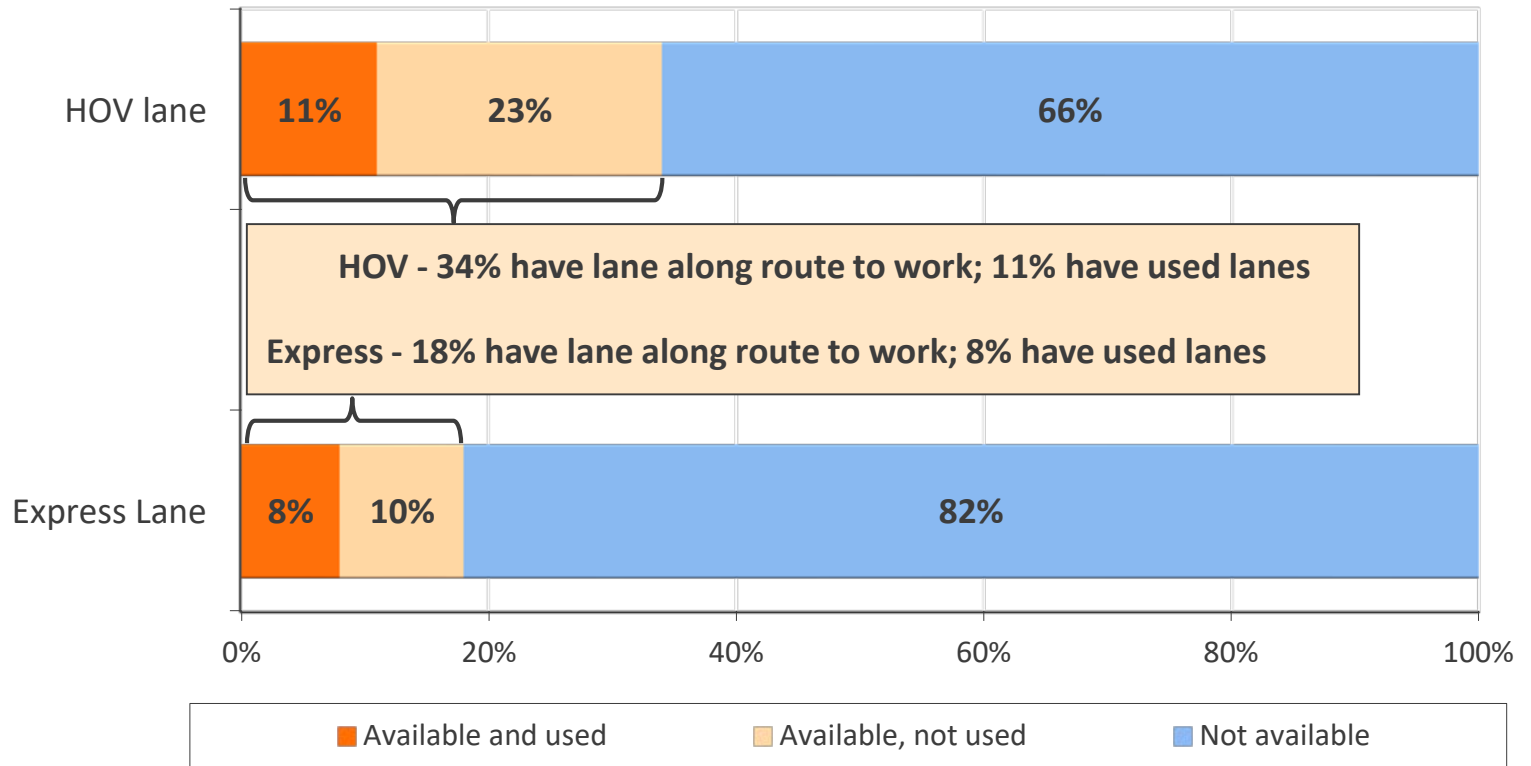
2019 SOC
n = 8,107

* 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?

One-third of Commuters Had HOV Lane Along their Route to Work and 18% Had Access to an Express Lane

One-third of commuters who had access to HOV used the lanes; Nearly half of commuters who had Express lanes available used them



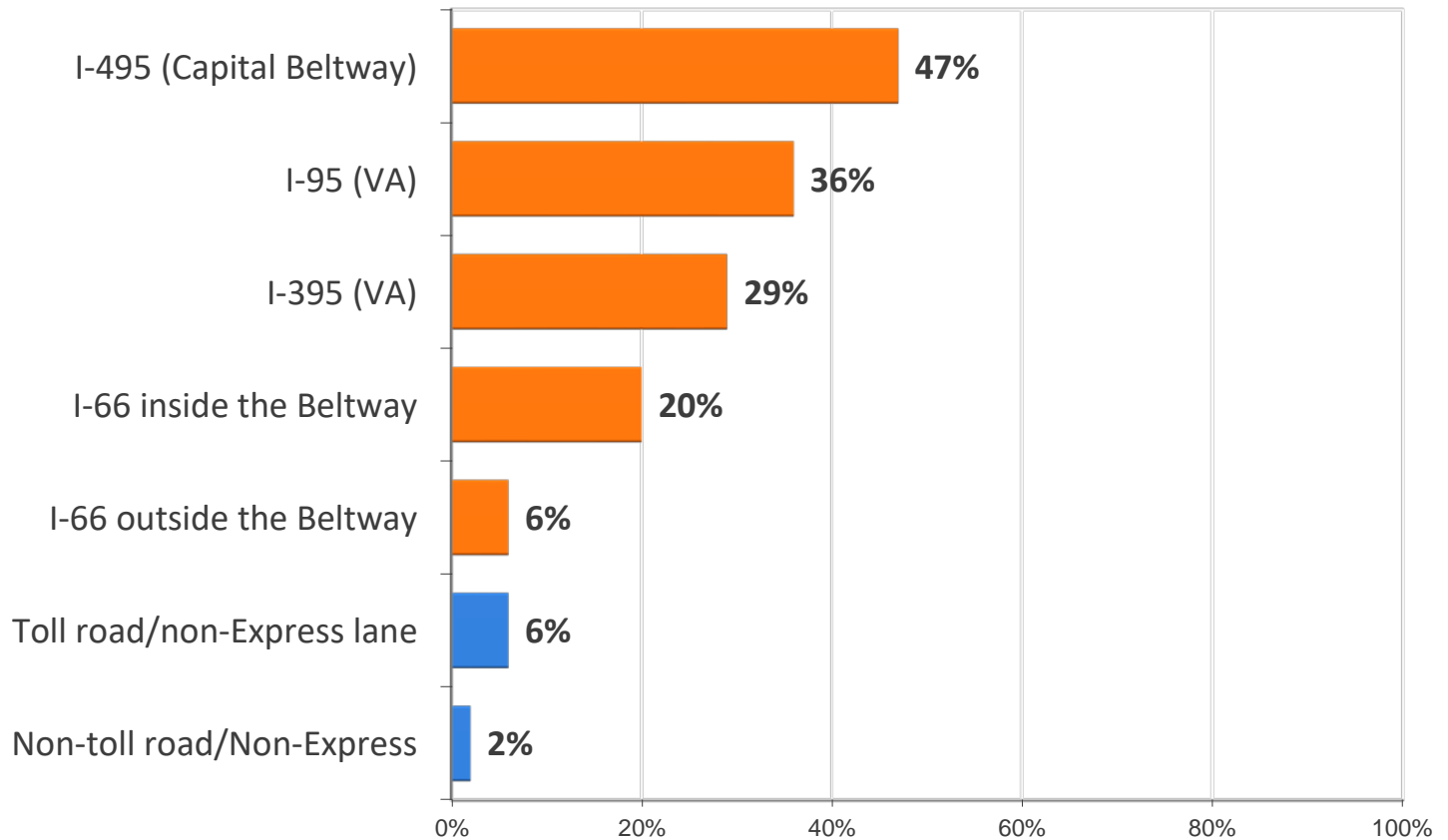
Q46 Is there a special HOV (High Occupancy Vehicle) lane along your route to work?

Q47 How often do you use the HOV lane to get to or from work?

Q47a How often do you use the Express lane to get to or from work?

Nearly Half of Express Lane Users Traveled on I-495; One-third Used I-95 in VA and 29% Used I-395

8% of respondents who said they used an Express lane mentioned a non-Express toll road or a road with only HOV lanes, suggesting some confusion about the Express lane concept



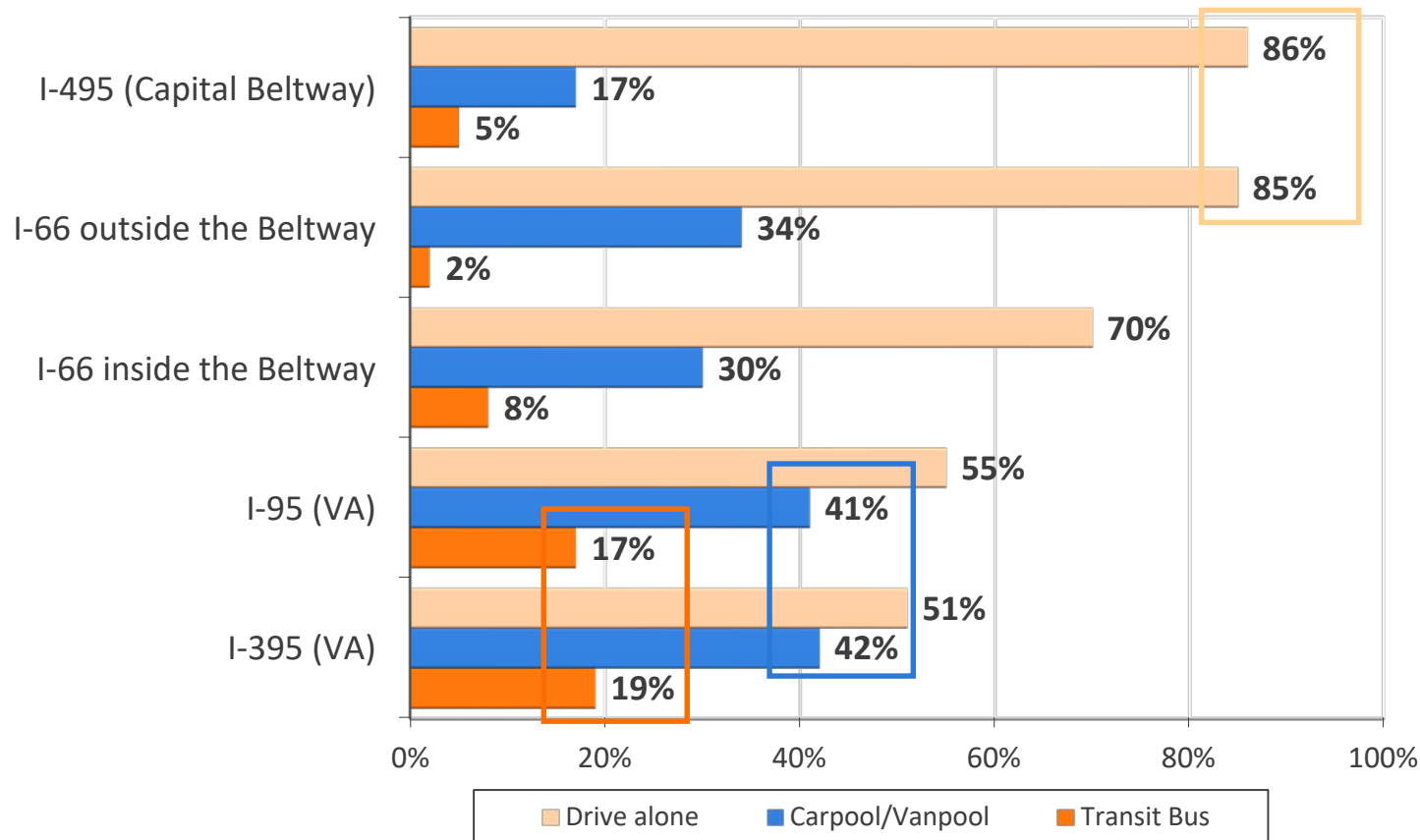
n = 567,
Multiple
responses
permitted

Q47b Which Express lanes do you use to get to or from work?

73% of Express Lane Users Typically Drove Alone While Using the Lanes, 26% Used CP/VP, 10% Rode Transit

Drive alone use of Express lanes was most common on the Beltway (86% of users drove alone) and on I-66 outside the Beltway (85%)

Carpooling/vanpooling and transit were common on I-95 and I-395



I-495
n = 567

I-66 Outside BW
n = 38

I-66 Inside BW
n = 96

I-95
n = 203

I-395
n=162

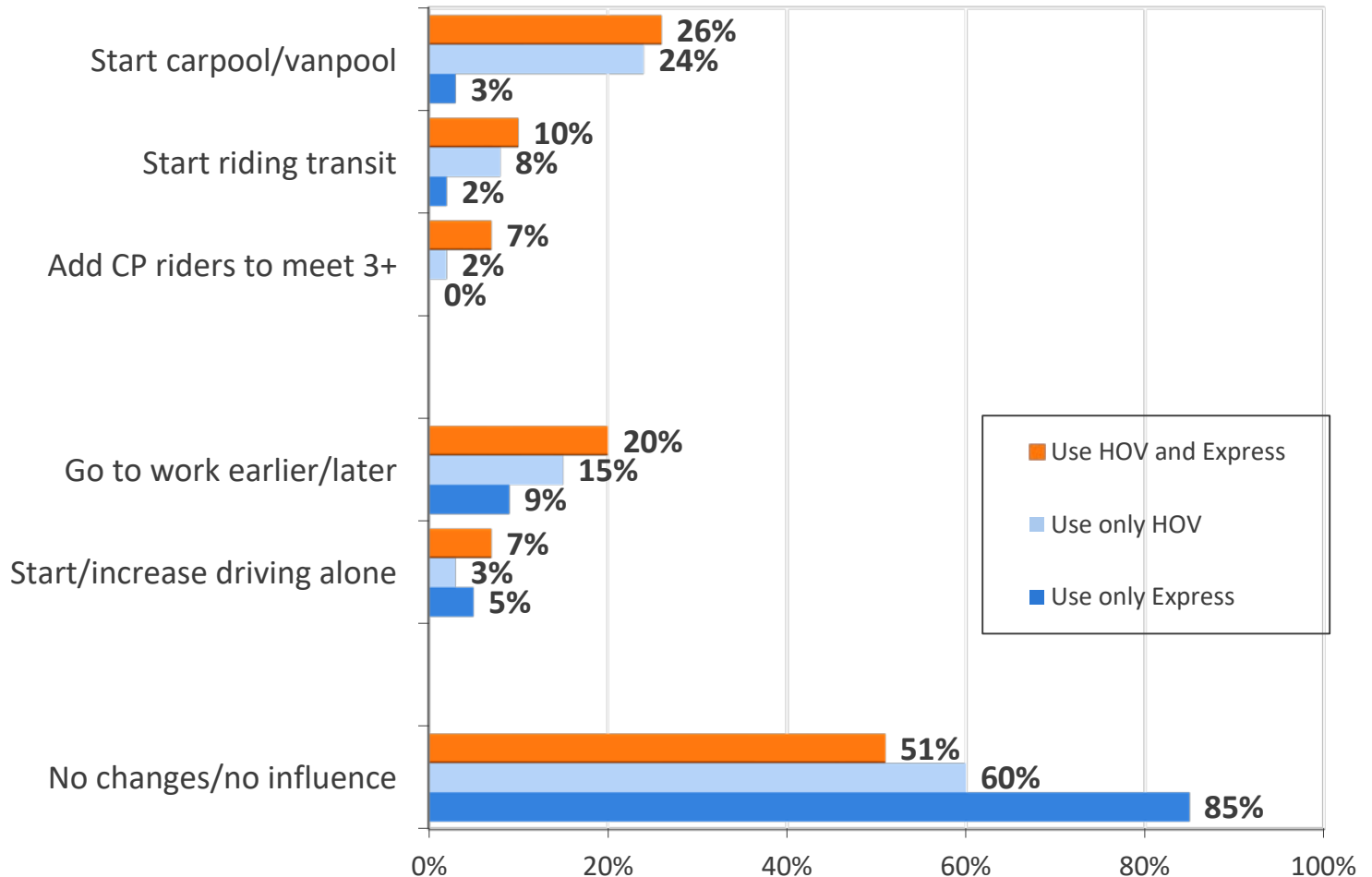
Multiple responses permitted

Q47b Which express lanes do you use to get to or from work?

Q47c On the days you use the express lanes are you ... [driving alone, riding in a carpool/vanpool, riding transit (bus, commuter bus)?

HOV Lane Users were Much More Likely to Make Alt Mode Changes Than Were Those Who Used Only Express Lanes

Most (85%) Express lane users said the lanes had not influenced their travel at all



Use HOV/Express
n = 283

Use only HOV
n = 457

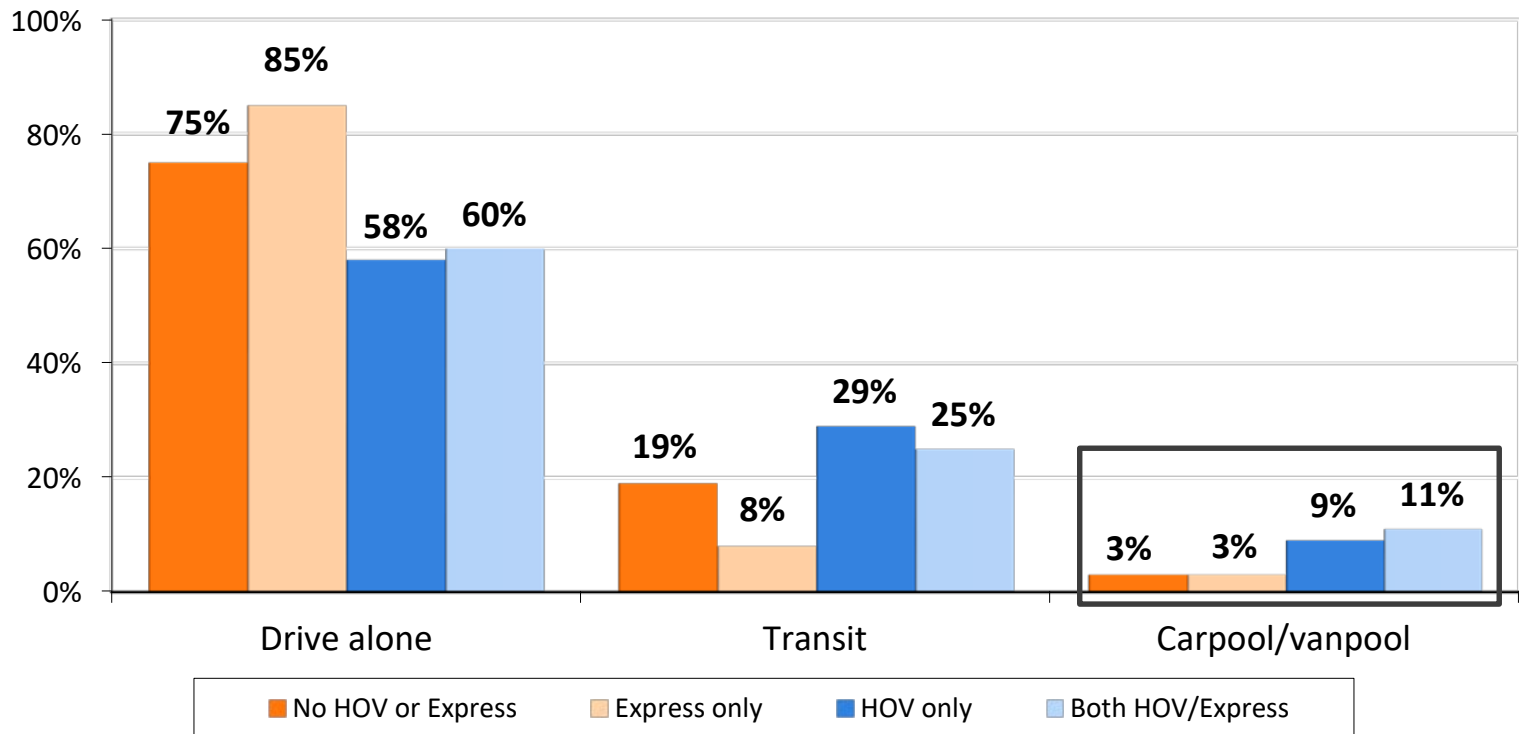
Use only Express
n = 284

Multiple
responses
permitted

Q51 Did availability of the HOV or express lane influence you to make any of the following changes in how you commute?

CP/VP Use is 9% When Respondents Have HOV Lane Access vs 3% for No HOV or Express Lane Only

The drive alone rate for HOV lanes is much higher among commuters have access only to Express lanes (85%) or to neither HOV nor Express (75%)



Lanes Available

No HOV/Express
n = 4,401

Express only
n = 201


HOV only
n = 1,359

HOV and Express
n = 982

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

Q47 How often do you use the HOV lane to get to or from work?

Q47a How often do you use the Express lane to get to or from work?

The background of the slide is a photograph of water with ripples, reflecting light in shades of blue and gold. A semi-transparent blue rectangular box with a thin orange border is centered in the lower half of the image, containing the title text.

Commute Ease and Commute Satisfaction

50% of 2019 Respondents Were Satisfied with their Commute, Lower than in 2016, 2013, or 2010

Inner Core residents much more satisfied (63%) than were Middle Ring (50%) or Outer Ring (37%) residents; Satisfaction dropped as travel time increased

Satisfied by Travel Time

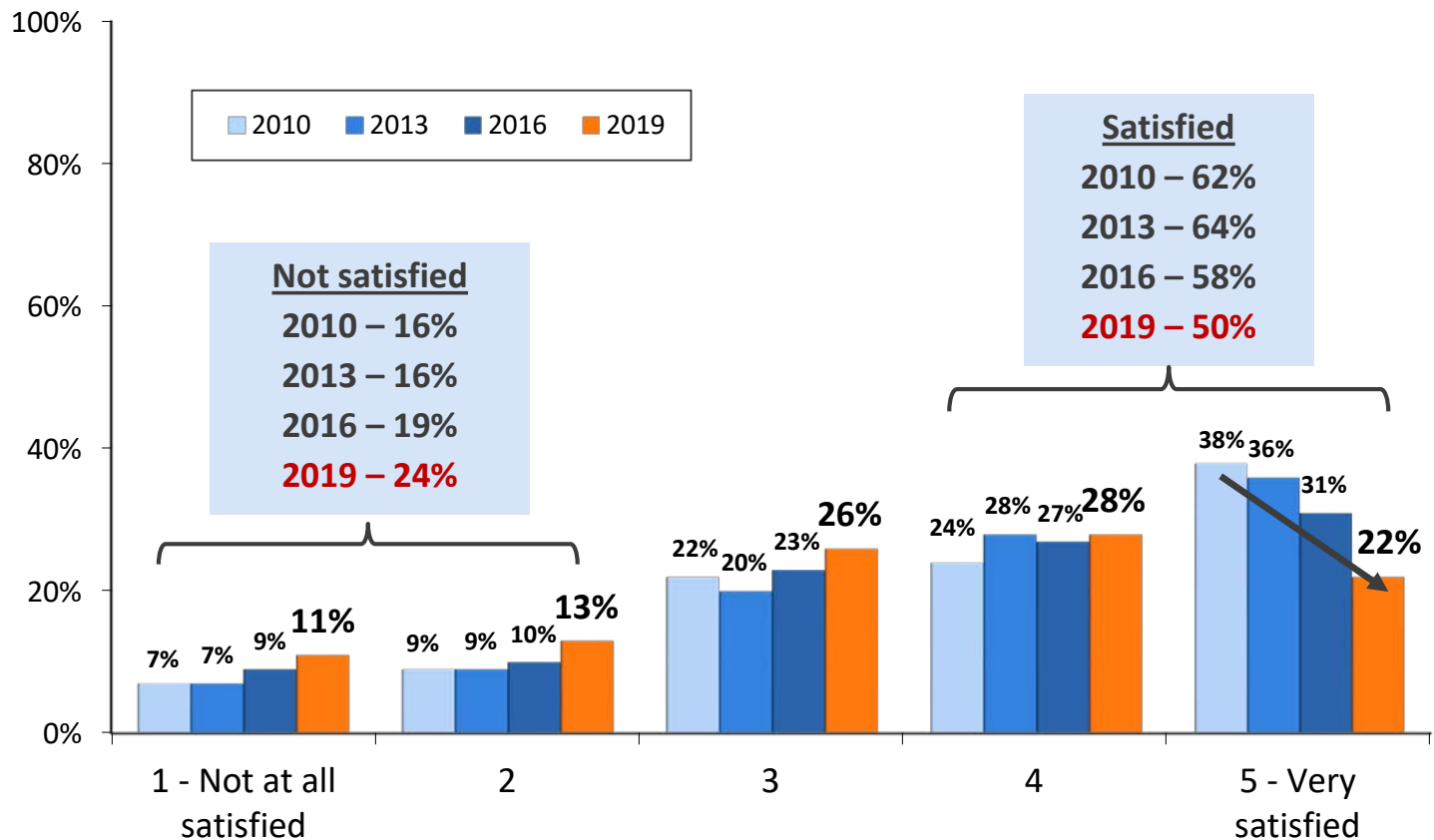
- 1-10 min – 92%
- 11-20 min – 80%
- 21-30 min – 59%
- 31-45 min – 43%
- 46-60 min – 32%
- > 60 min – 26%

2010
n = 6,033

2013
n = 5,692

2016
n = 5,217

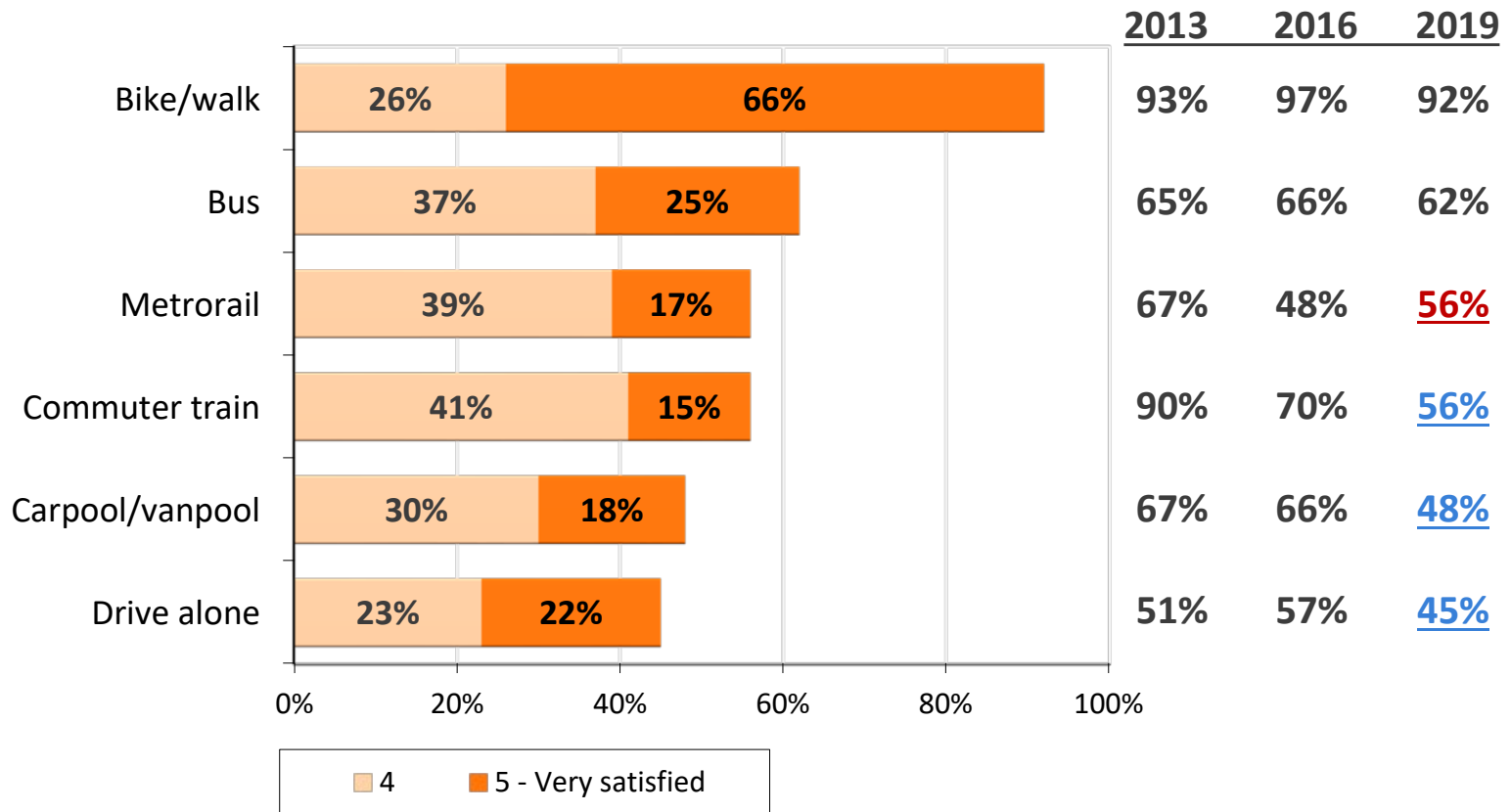
2019
n = 7,911



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

Bikers/Walkers Were Most Satisfied; Ridesharers and Commuters Who Drove Alone Were Least Satisfied

Metrorail riders were notably MORE satisfied in 2019 than in 2016; satisfaction declined for commuter rail, CP/VP, and drive alone commuters



Bike/walk
n = 302

Bus
n = 588

Metrorail
n = 1,777

Commuter train
n = 144

Carpool/vanpool
n = 378

Drive alone
n = 5,042

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

In 2019, 28% of Commuters Reported a More Difficult Commute than a Year Ago – Higher than in 2016

Commuters who lived in the Outer Ring and those with long travel times more likely to report a more difficult commute;
 Commuters who moved home or work more likely to report easier commute

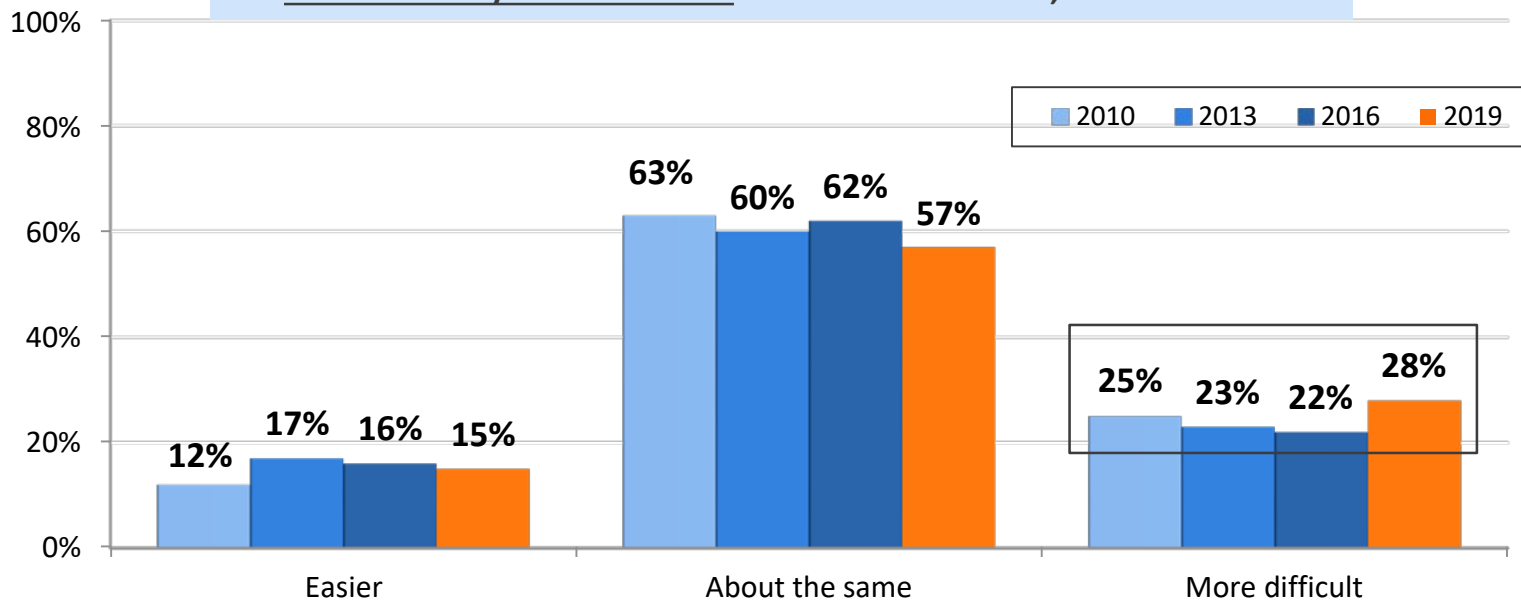
More Difficult Commute

Home Area: Inner Core – 21%, Middle Ring – 26%, **Outer Ring – 40%**

Distance: 1-20 min – 10%, 21-30 min – 22%, **31-45 min – 31%, 46+ – 40%**

Easier Commute

Moved Home/Work Location: Did not move – 9%, **Moved – 40%**



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

2010
n = 6,049

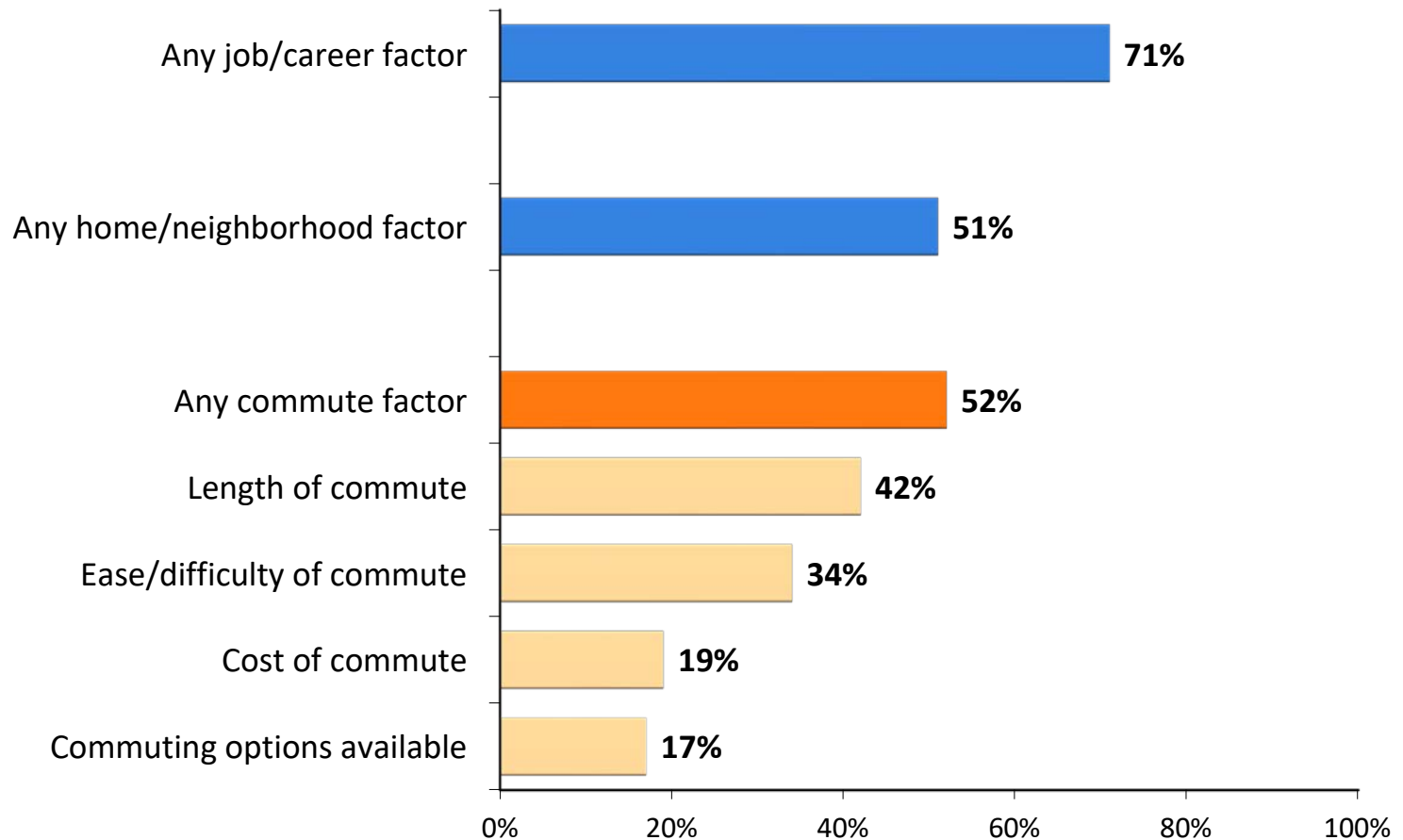
2013
n = 5,717

2016
n = 5,142

2019
n = 7,787

52% of Commuters who Moved Home/Work Location Said Commute Factors Were Important to the Decision

33% said commute ease was more important than other factors in the decision

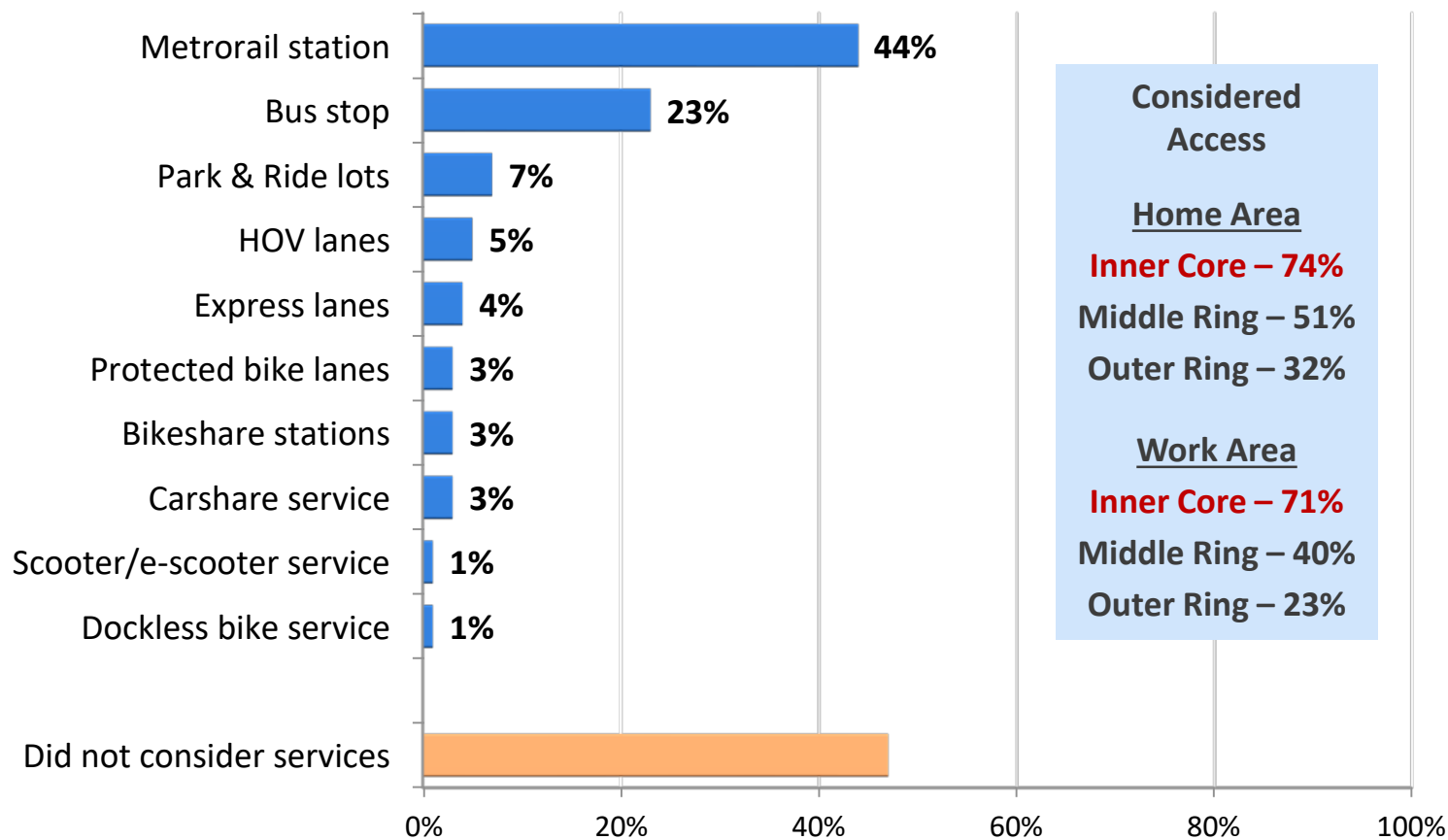


Home/work
change
n = 2,013

Q60 – Have you changed your work or home location in the last year?
Q60b - What factors did you consider in your decision to make this change?

53% of Commuters who Moved Home/Work Considered Availability of Transportation Services at the New Location

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



Home/work
change
n = 2,013

Q60 – Have you changed your work or home location in the last year?

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



Telework Experience

Telework Has Nearly Tripled Since 2004 – 35% of Regional Commuters Teleworked at Least Occasionally in 2019

Between 2016 and 2019, the region added 196,000 new teleworkers for a total of 1,073,000

Telework frequency

< 1 day/wk – 41%

1-2 days/wk – 45%

3+ days/wk – 14%

2004 SOC
n = 6,851

2007 SOC
n = 6,168

2010 SOC
n = 6,050

2013 SOC
n = 5,892

2016 SOC
n = 5,503

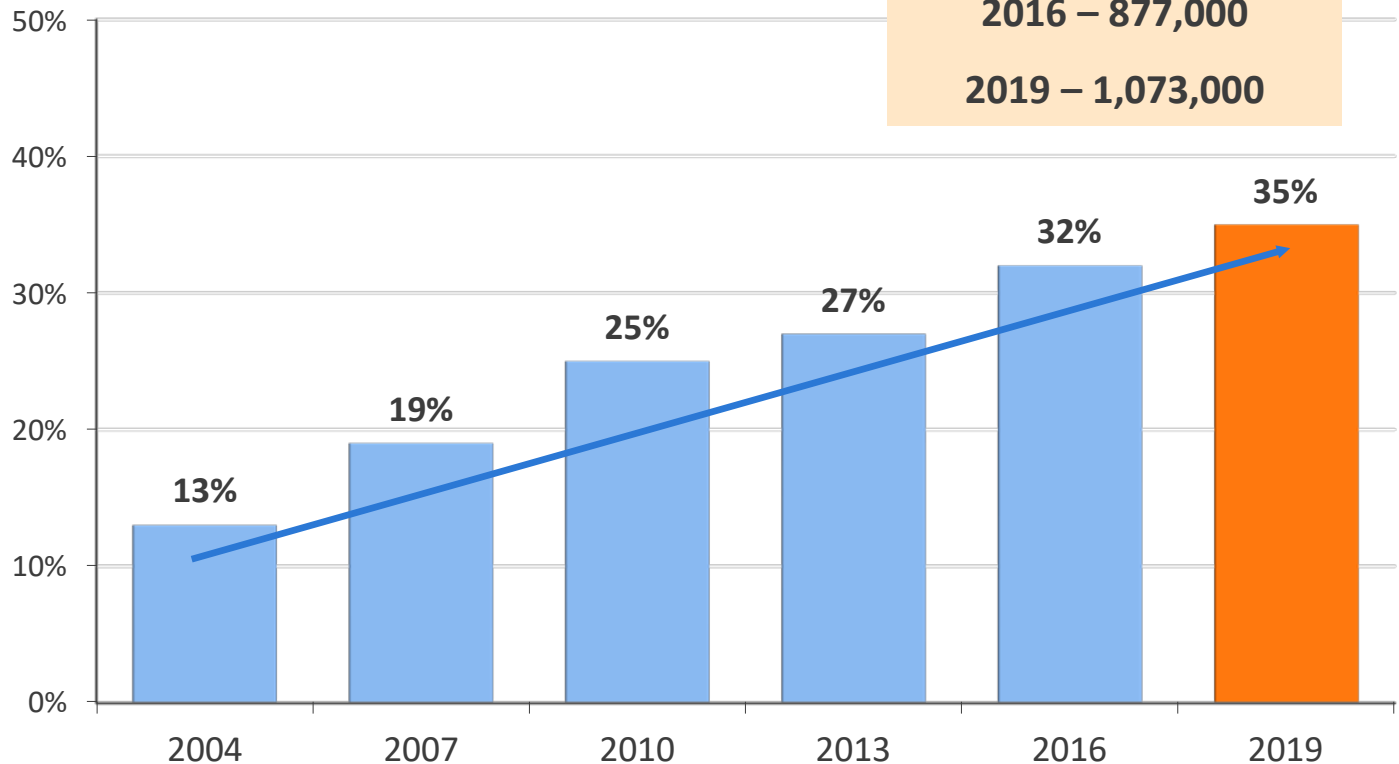
2019 SOC
n = 8,107

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

Regional Teleworkers:

2016 – 877,000

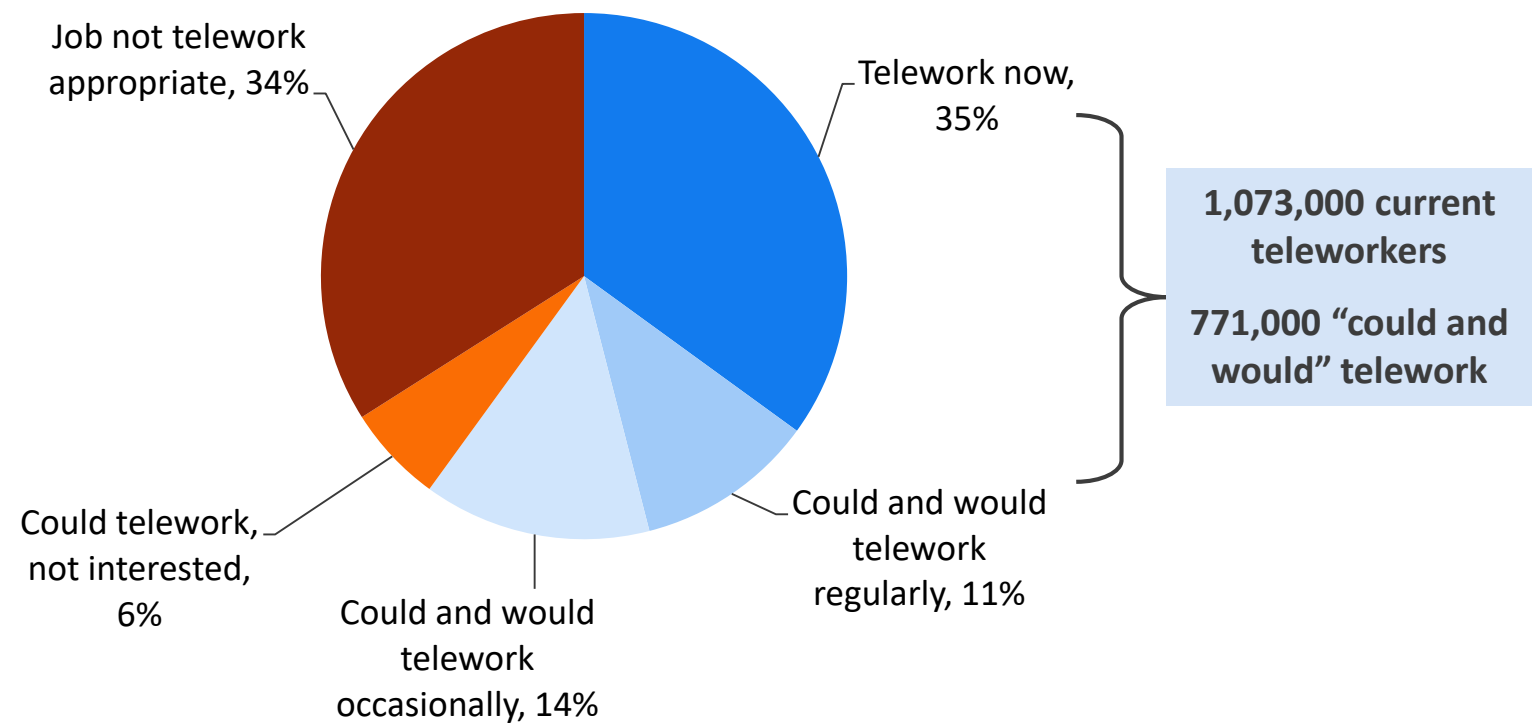
2019 – 1,073,000



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?

771,000 Non-teleworkers Had Job Responsibilities that Were Telework-Appropriate and Would Like to Telework

More than half of interested workers would like to telework “regularly”



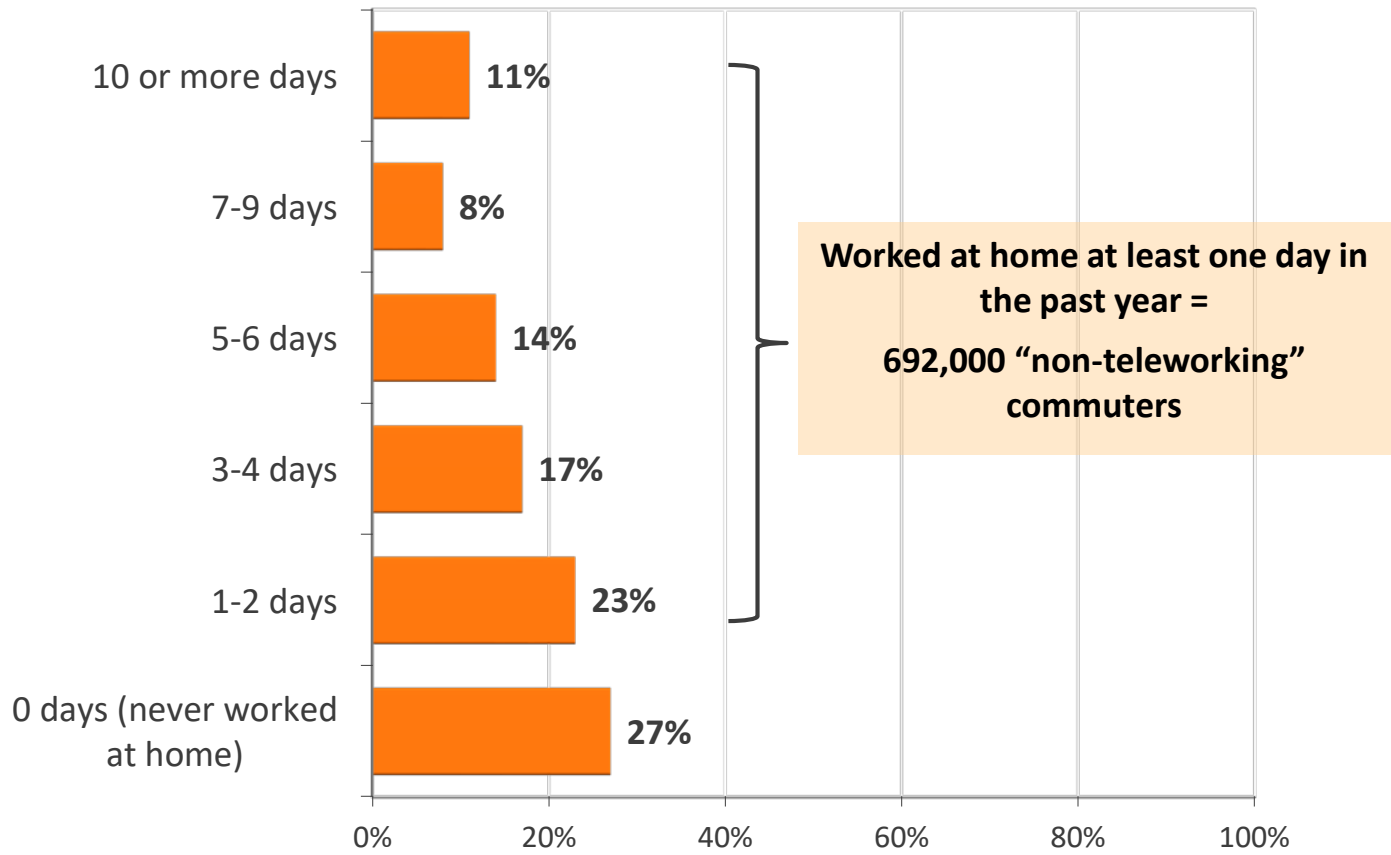
n = 8,107

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?

73% of Non-teleworkers With TW-Appropriate Jobs Worked at Home All Day at Least One Regular Work Day Last Year

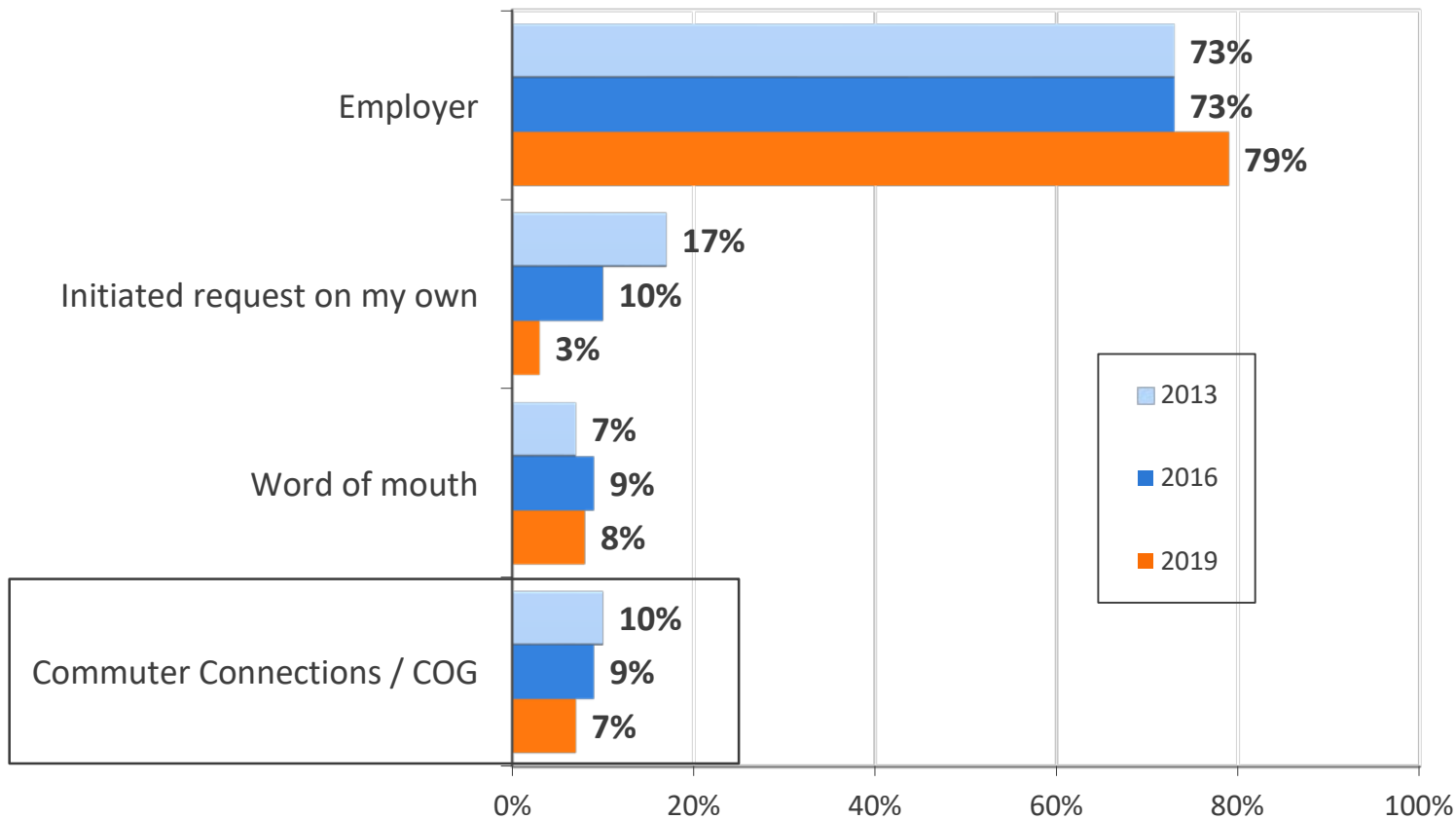
They averaged 5.3 work at home days per year (about 0.11 days/week) vs 1.2 days per week for respondents who self-identified as teleworkers



Non-teleworking commuters who have telework-appropriate jobs
n = 2,447

7% of Teleworkers Received TW Info from Commuter Connections/COG, Slightly less than in 2013/2016

Most learned about telework from their employer



2013
n = 1,556

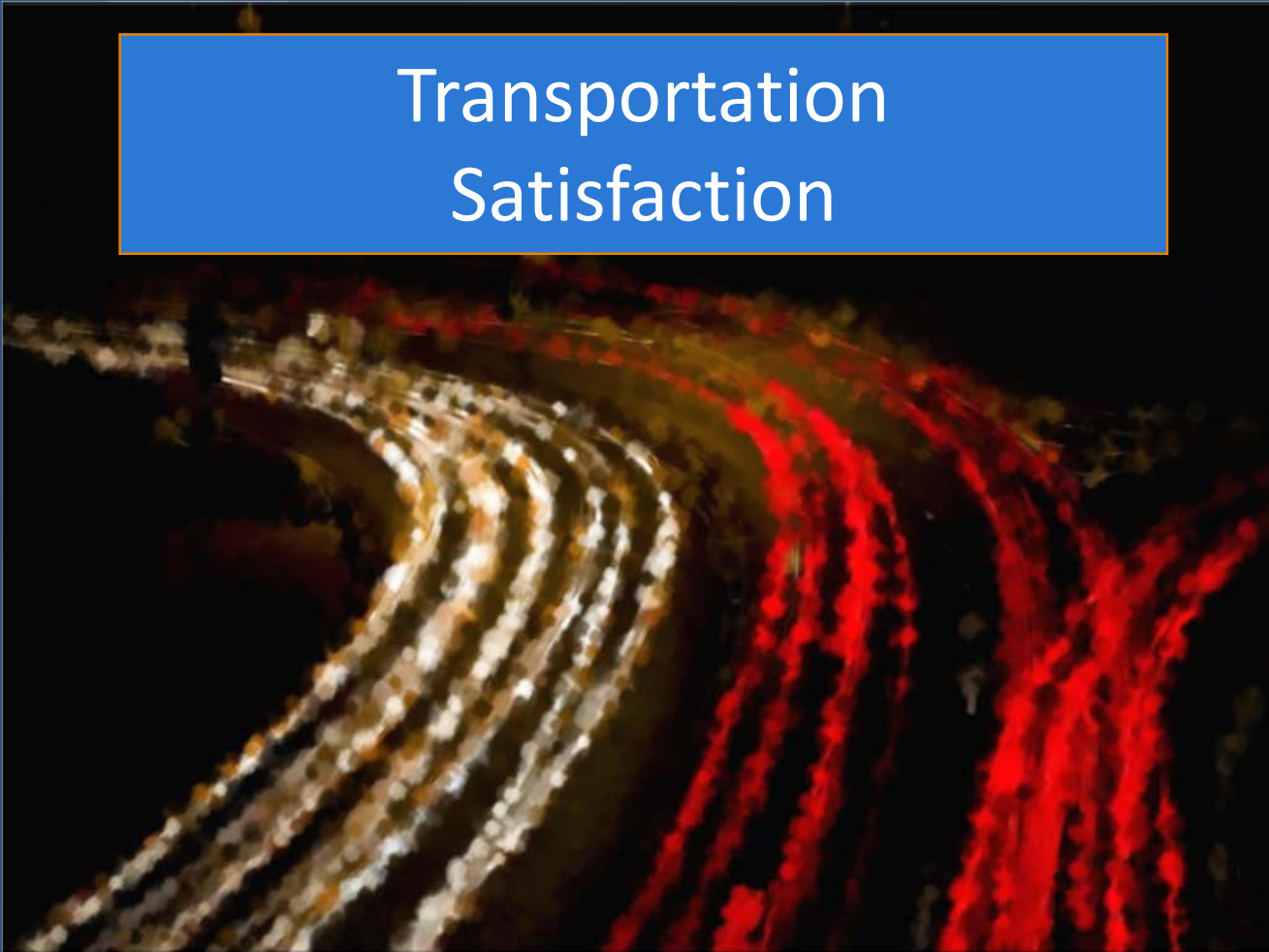
2016
n = 1,882

2019
n = 2,511

Q42 How did you find out about telecommuting?

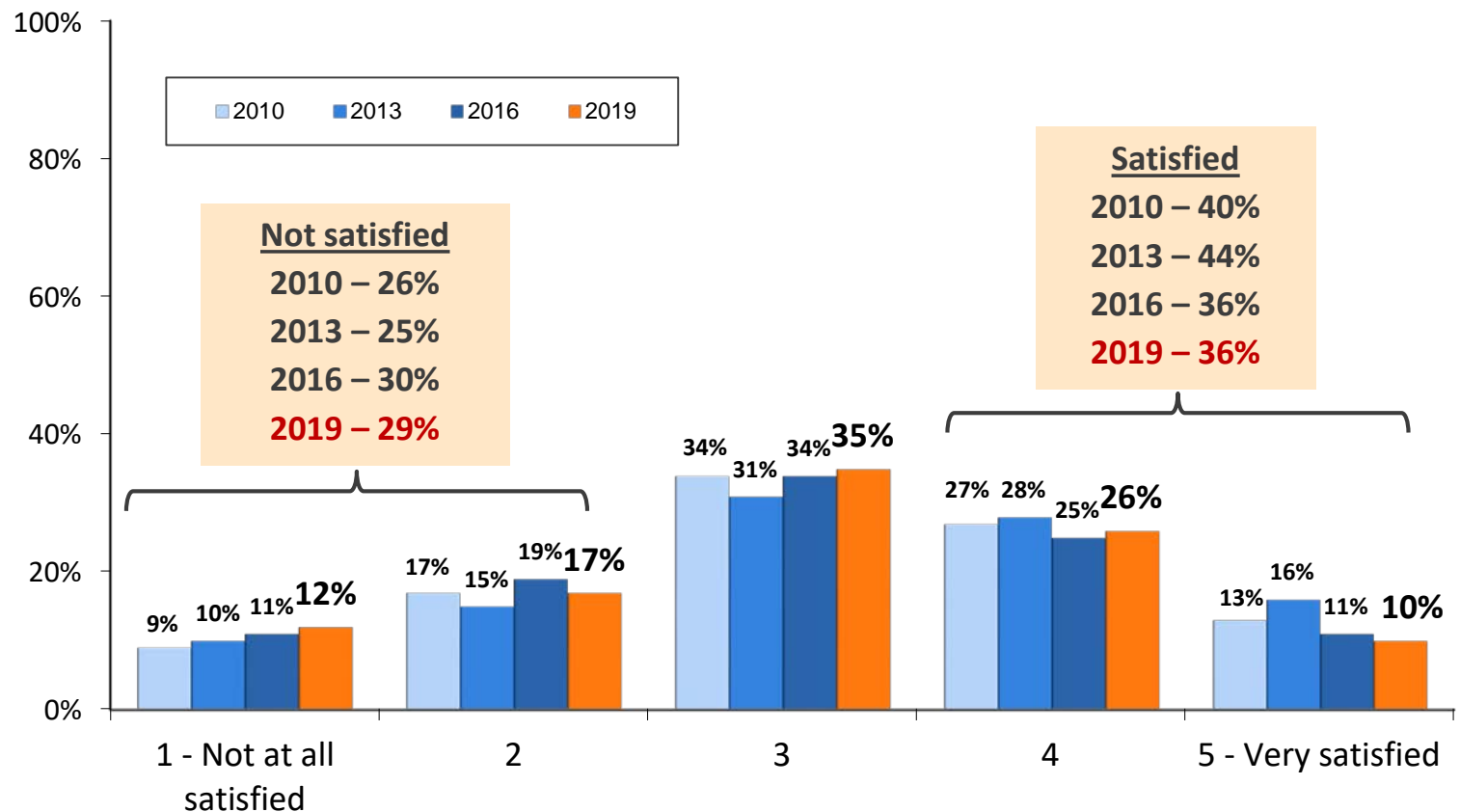
Q43 Did you receive any information about telecommuting from Commuter Connections or from the Metropolitan Washington Council of Governments?

Transportation Satisfaction



Satisfaction with the Transportation Network Stabilized in 2019 at the 36% Level from 2016

Transportation satisfaction was lower than commute satisfaction (50%), suggesting many commuters had found an acceptable commute, but were not as happy with transportation options overall



2010
n = 6,420

2013
n = 5,486

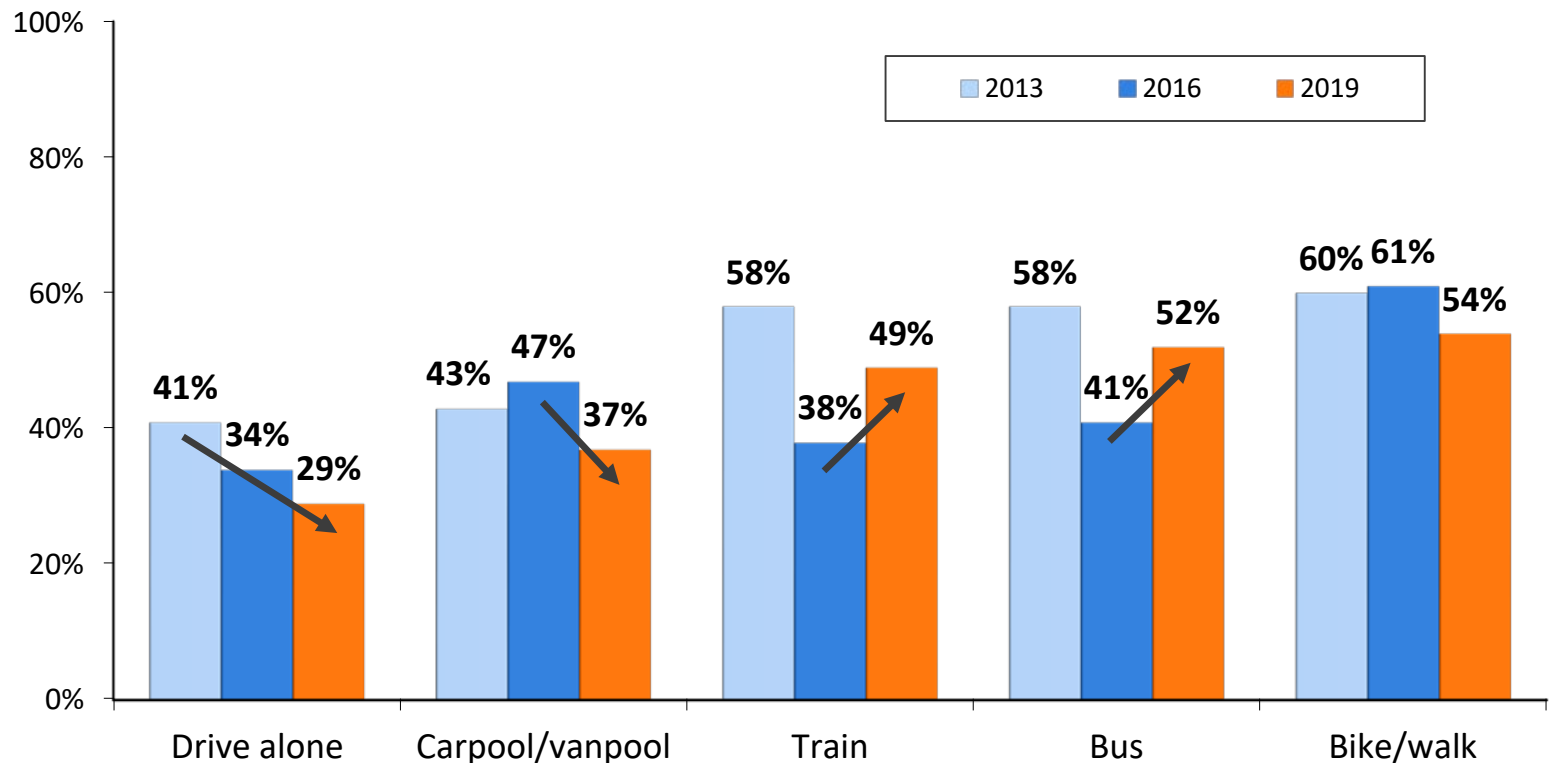
2016
n = 5,093

2019
n = 7,358

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

Transit Riders Reported Notably HIGHER Transportation Satisfaction in 2019, Reversing a Drop From 2013 to 2016

Satisfaction continued to decline among commuters who drove alone, reaching its lowest level. Carpoolers/vanpoolers also expressed lower satisfaction in 2019 than in 2016 or 2013.



2019 SOC

Drive alone
n = 4,532

Carpool/vanpool
n = 362

Train
n = 1,317

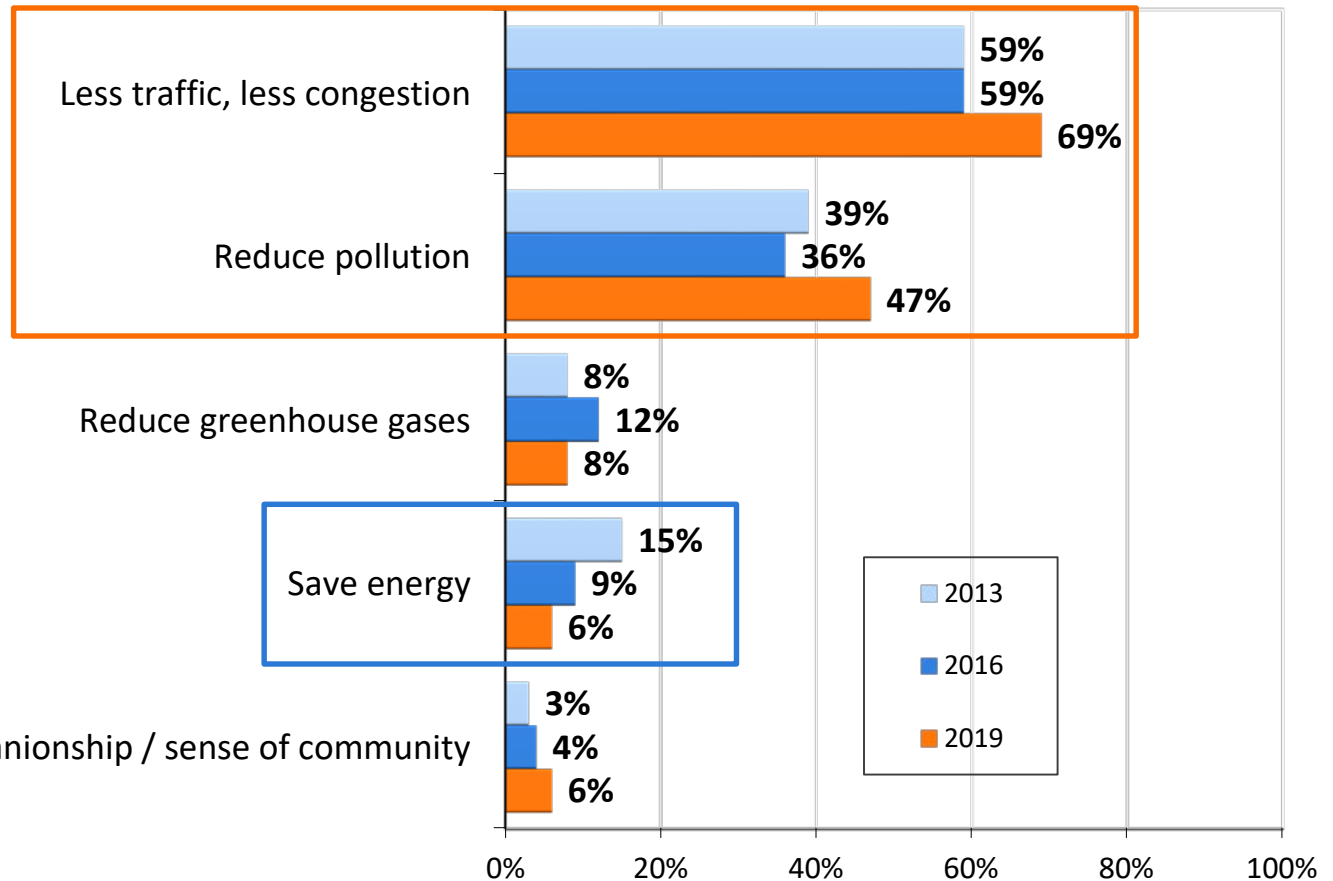
Bus
n = 583

Bike/walk
n = 300

Q15. In a typical work week, what type of transportation do you use on each of the days you work?
Q56e How satisfied you are with the transportation system in the Washington metropolitan region?

76% of Respondents Cited Societal Benefits from Alternative Mode Use

Notably higher shares of 2019 respondents mentioned traffic, congestion, and pollution improvements as benefits. Saving energy was mentioned less often



Other 2019 Benefits

Safety - 5%

Reduce accidents – 5%

Good for economy – 2%

Reduce road wear – 2%

2013
n = 5,718

2016
n = 5,239

2019
n = 6,445

89% of Alt Mode Users Mentioned a Personal Benefit, but Key Benefits Differed by Mode

Transit riders and bikers/walkers particularly mentioned quality of life benefits, carpooler/vanpoolers noted companionship and saving time/money

Key Transit Benefits

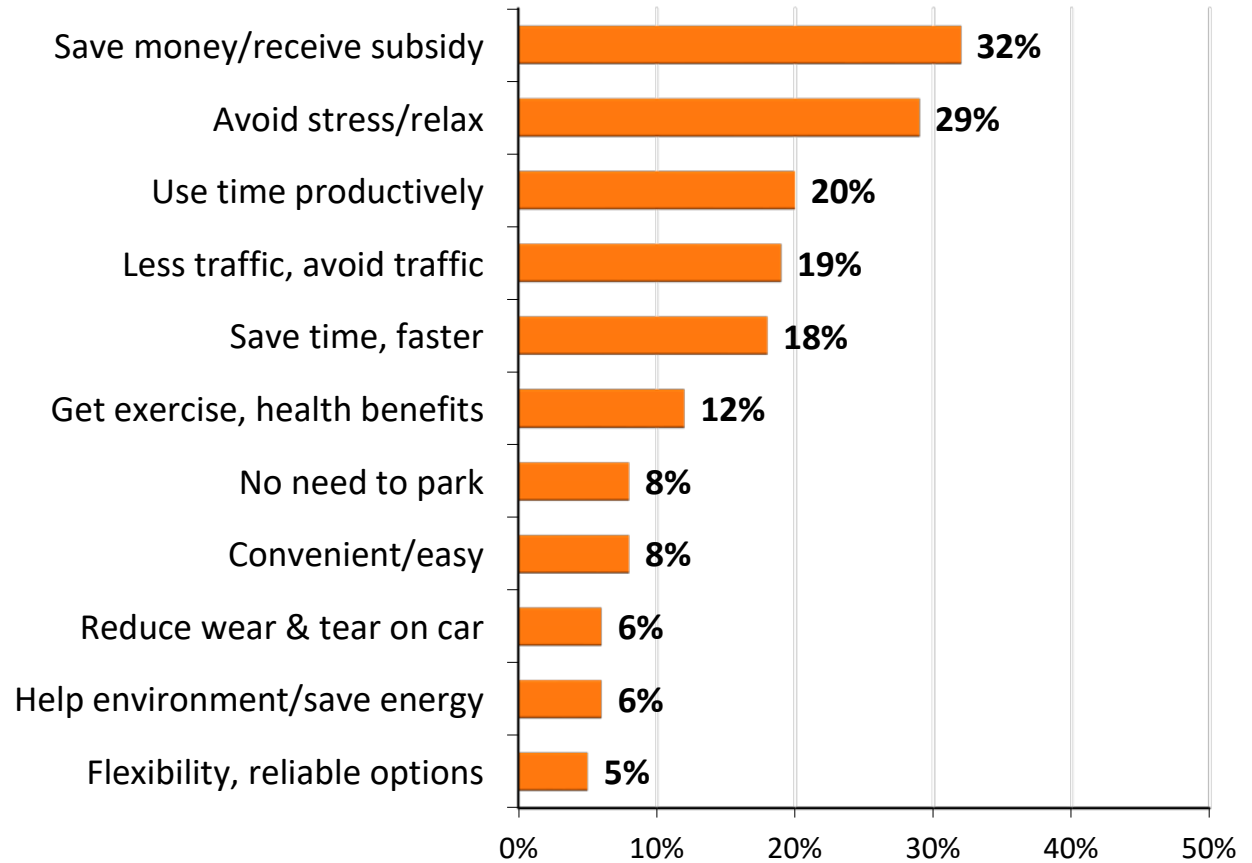
- Avoid stress/relax
- Use travel time productively
- Less traffic/congestion
- No need to park
- Receive financial benefit

Key Rideshare Benefits

- Save money
- Save time
- Save gas/energy
- Companionship during commute
- Use HOV lane

Key Bike/Walk Benefits

- Get exercise
- Avoid stress, relax
- Flexibility, reliable

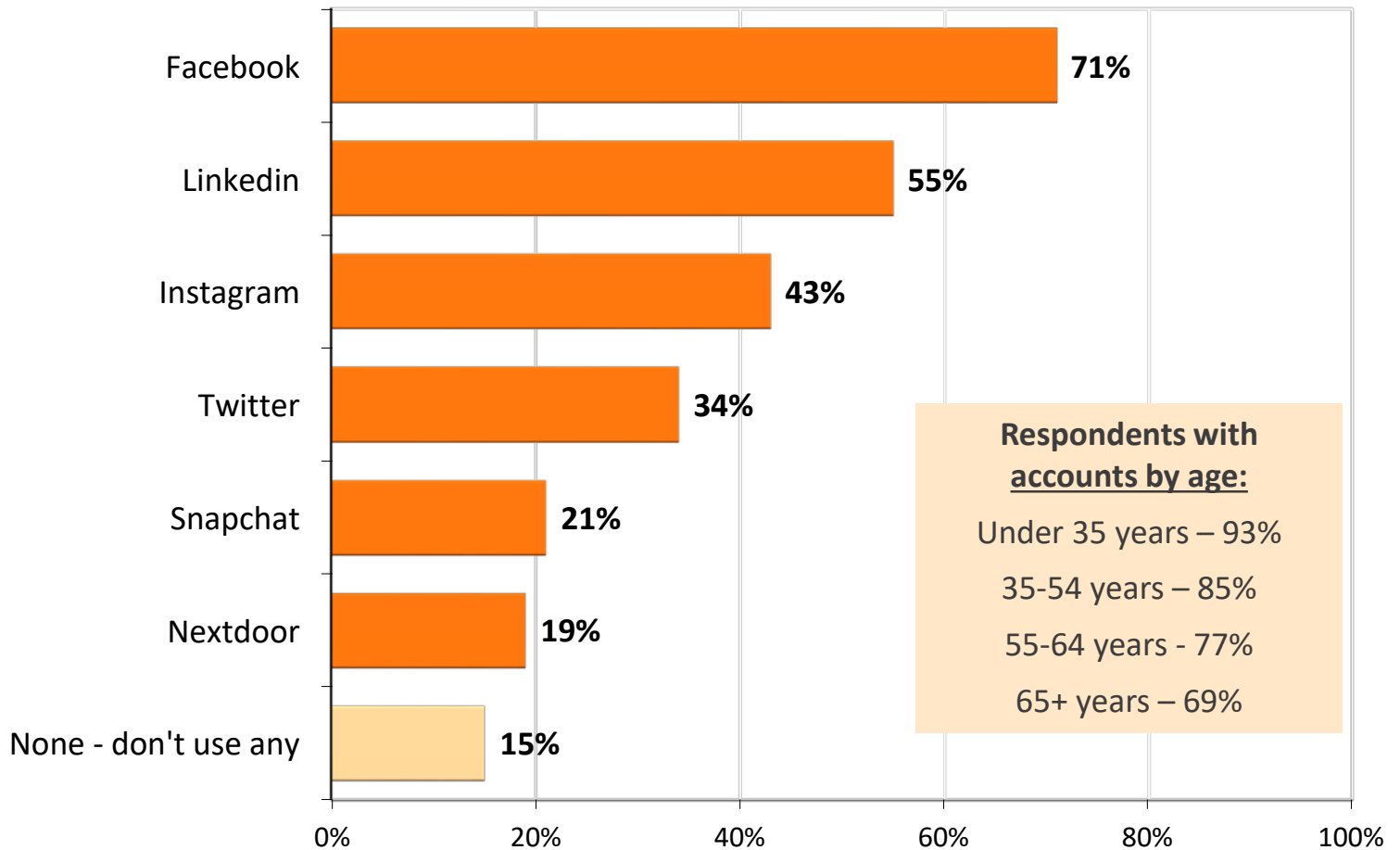




Technology Initiatives and Driverless Cars

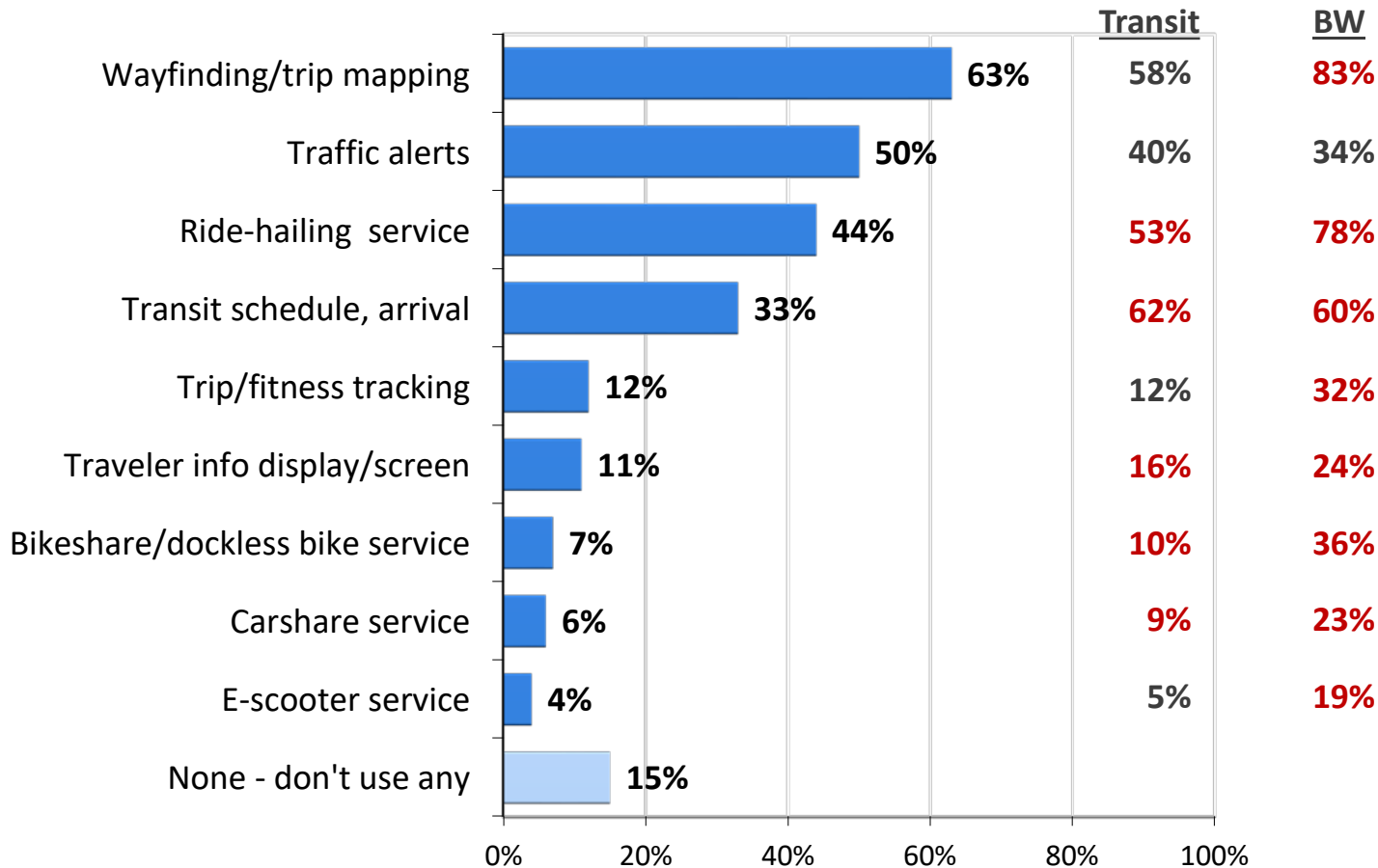
85% of Respondents Had an Account With at Least One Social Networking Application: Facebook (71%), LinkedIn (55%)

Use of accounts declined with increasing age



85% of Respondents Had Used at Least One Travel/Trip Info Application: Wayfinding (63%), Traffic Alerts (50%)

Transit and bike/walk commuters used most apps at a higher rate than did drive alone commuters and carpoolers/vanpoolers

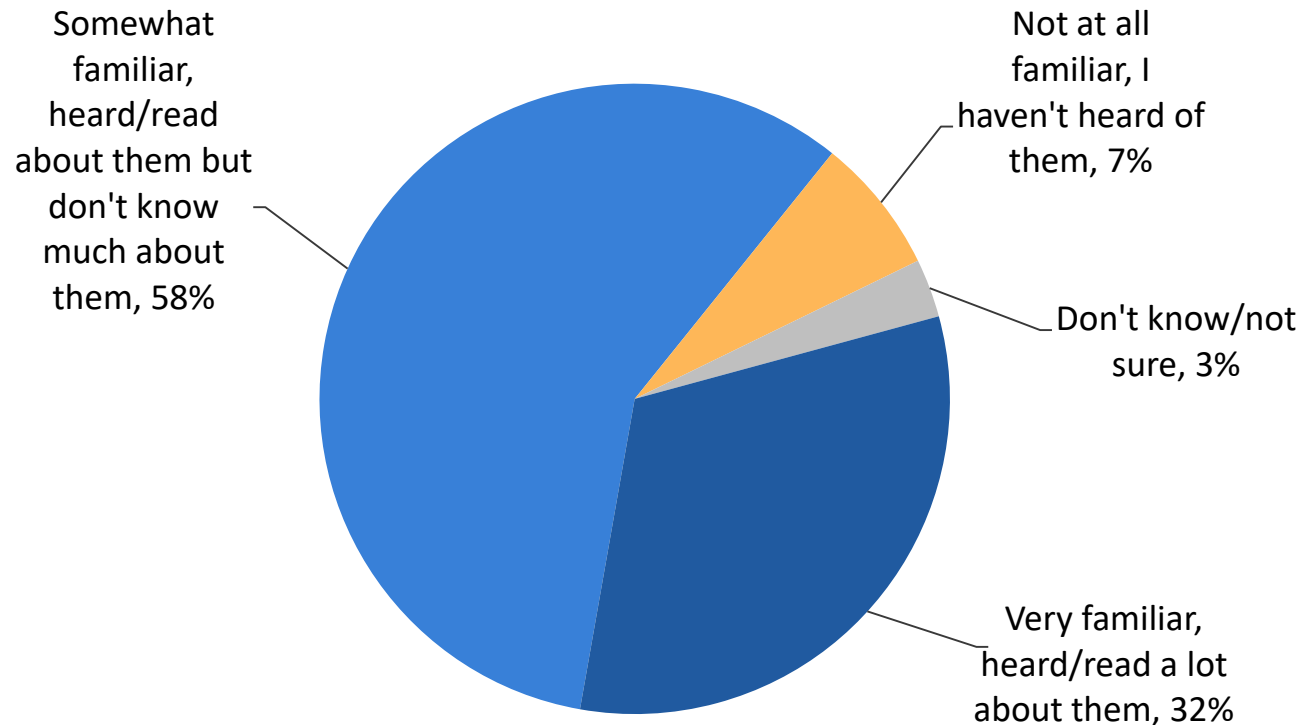


Use at least one travel info app by age:

- Under 35 – 91%
- 35-44 years – 87%
- 45-54 years – 84%
- 55-64 years – 82%
- 65+ years – 78%

One-third of Respondents Were “Very Familiar” with Concept of Driverless Cars; 58% Were “Somewhat Familiar”

Familiarity was higher among males and higher income respondents; there was very little difference by age



Reported Being very familiar:

Male – 44%
Female – 22%

\$160K+ – 44%
\$100-\$159K – 36%
< \$100K – 25%

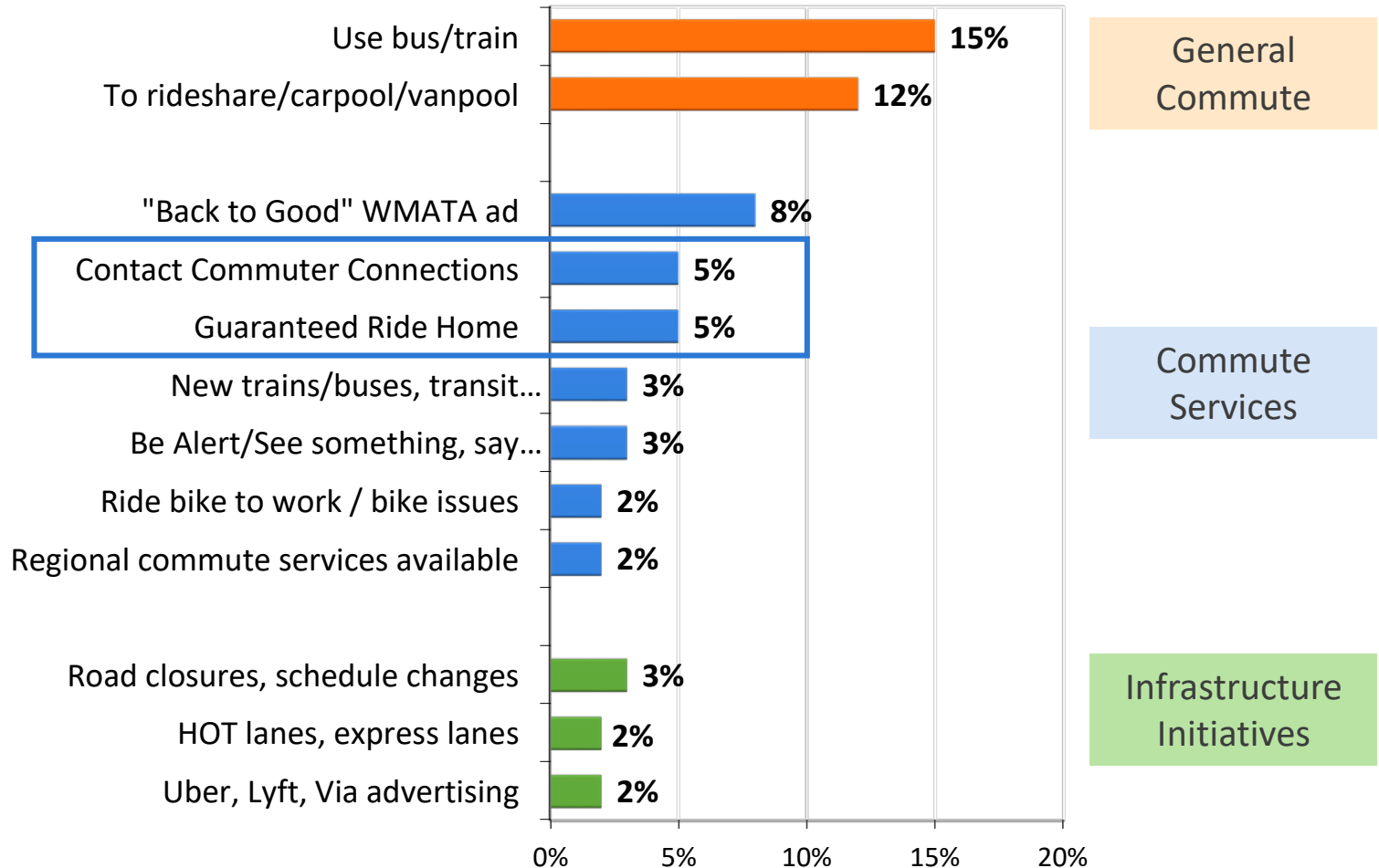
< 35 years – 34%
35-54 years – 30%
55+ years – 33%



Ad Awareness/Regional and
Local Commute Services

45% of Respondents Recalled Hearing/Seeing Commute Ads in the Past Year – Lower than in 2016 (54%)

59% who were aware of ads could name a specific message



Ad Sponsor:

31% named WMATA

10% named Commuter Connections or COG

n = 3,873

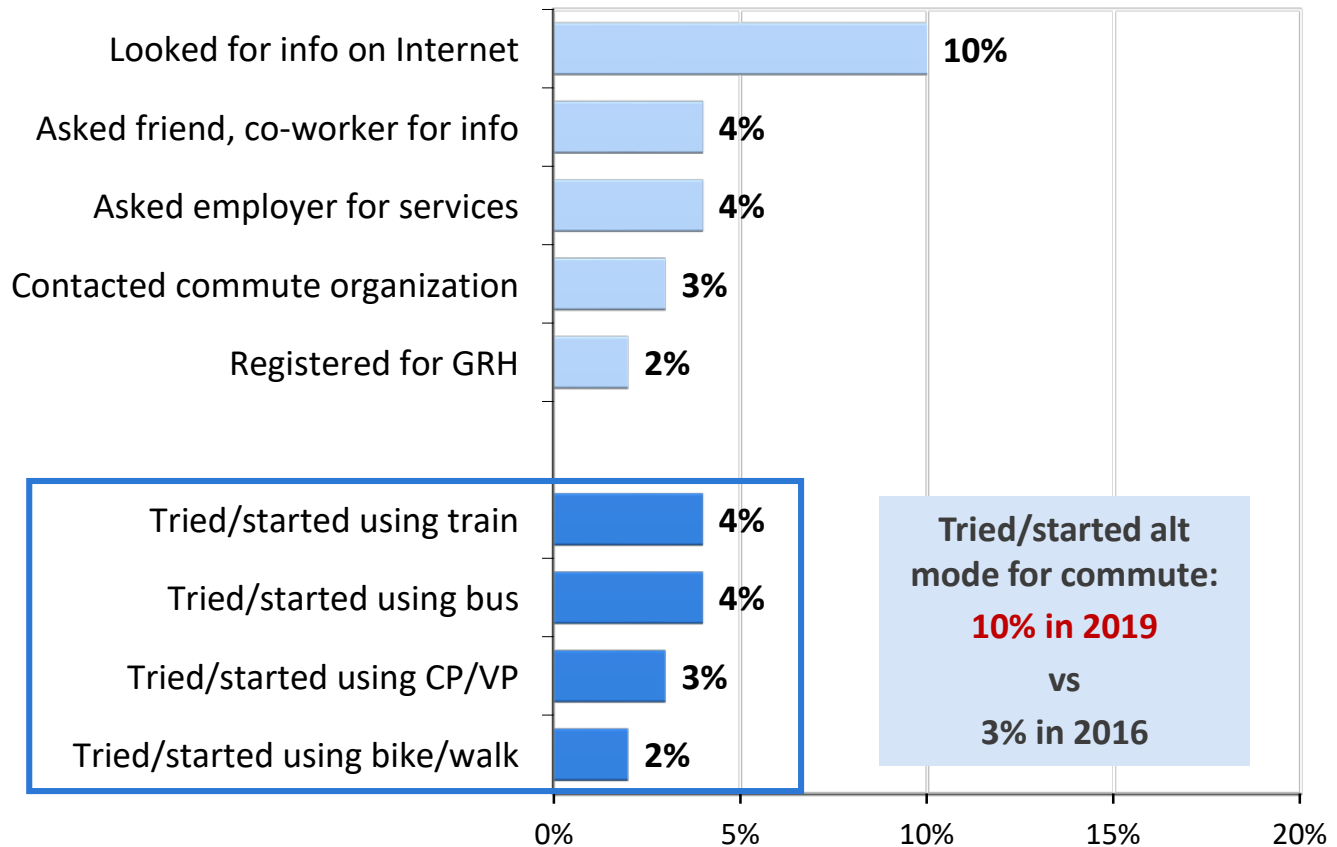
Q62 What messages do you recall from this advertising

18% of Respondents who Recalled Messages Took an Action to Try to Change their Commute – Twice the 2016 Rate (9%)

10% tried or started using an alternative mode for their commute, more than triple the 3% in 2016 – due in part to end of SafeTrack work?

43% who took action said the ad encouraged the action

43% who switched modes were driving alone before



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?

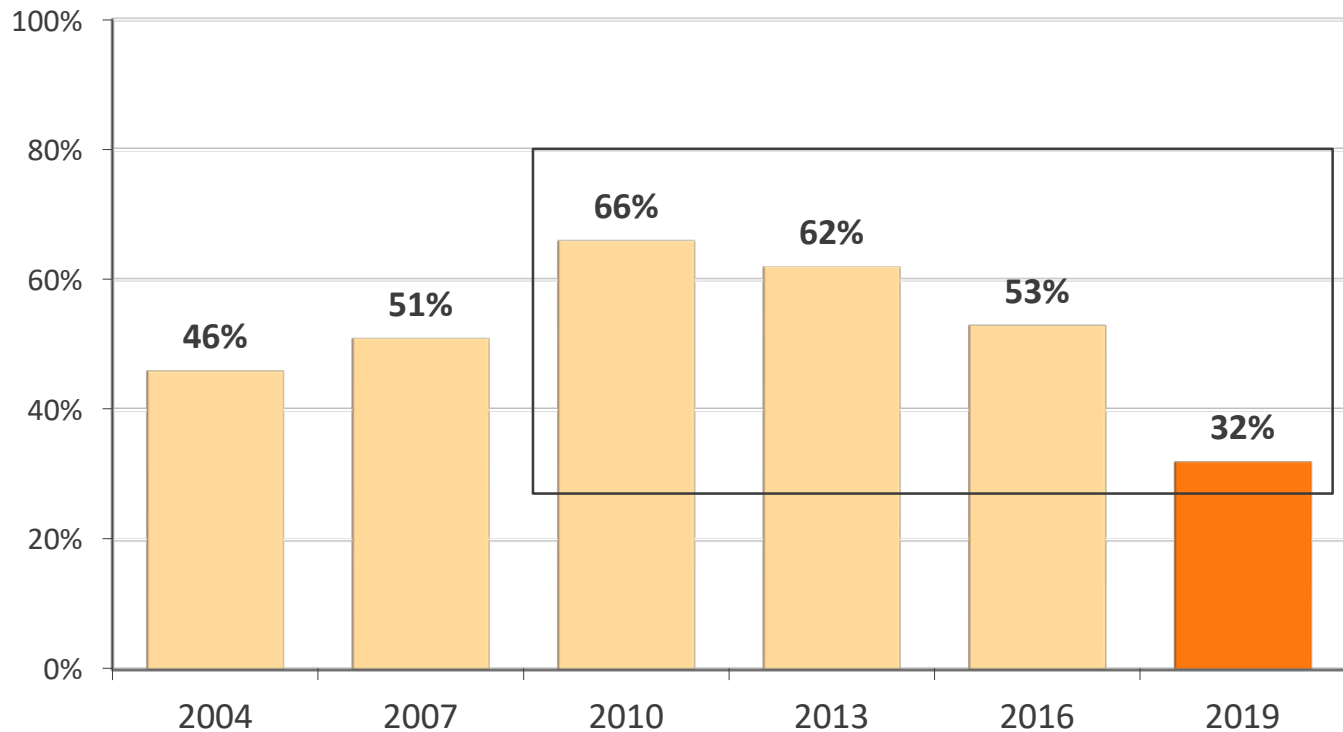
32% of Commuters Said a Commute Information Phone Number or Website Existed; 53% Were “Not Sure”

Awareness of regional commute information resources continued to decline, from the high of 66% in 2010

Used regional commute info source in past year:

2019 – 12%

2016 – 22%



2004 SOC
n = 7,200

2007 SOC
n = 6,600

2010 SOC
n = 6,629

2013
n = 6,335

2016 SOC
n = 5,903

2019 SOC
n = 8,236

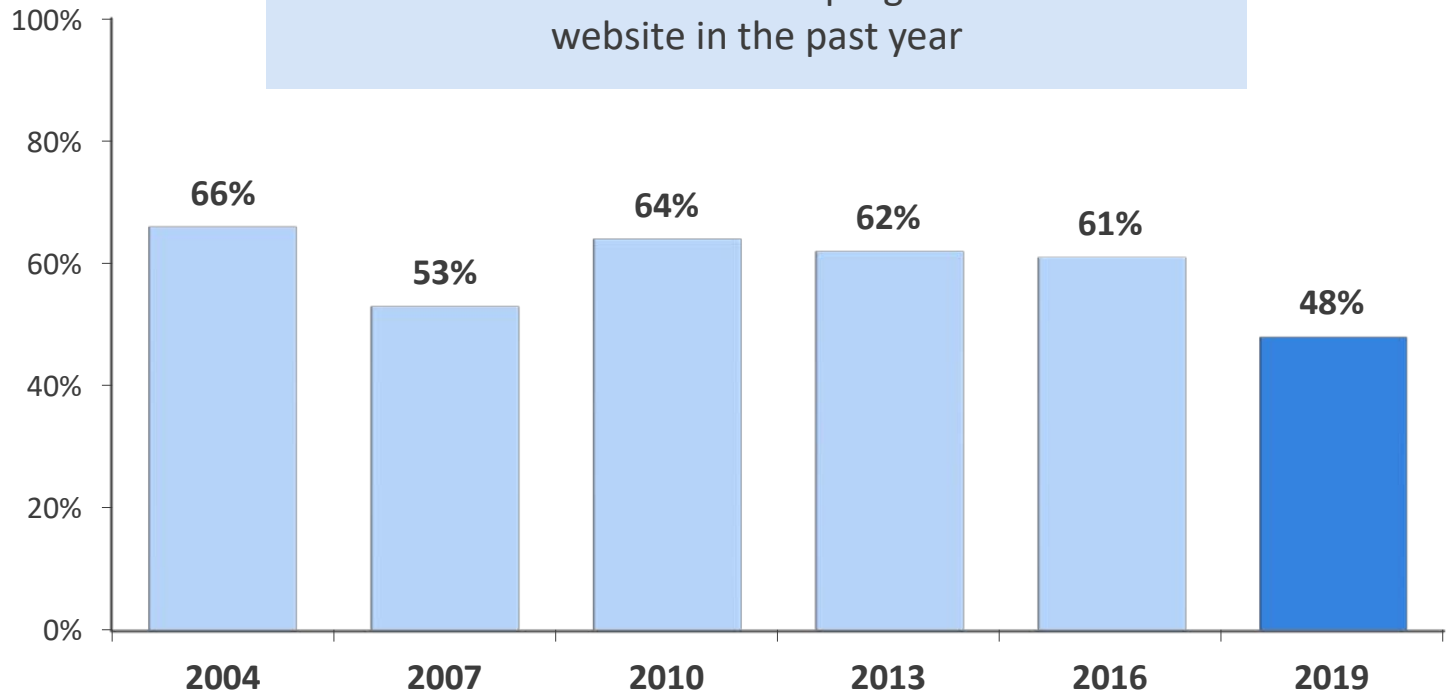
Q81 Is there a phone number or website you can use to obtain information on ridesharing, public transportation, HOV lanes, and telecommuting in the Washington region?

Q82 Have you used this number or website in the past year?

48% of Regional Commuters Knew of Commuter Connections; a Drop from 2016, But Still Overall High Awareness

Use of Commuter Connections dropped slightly, from 7% of regional commuters in 2016 to 5% in 2019

11% 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

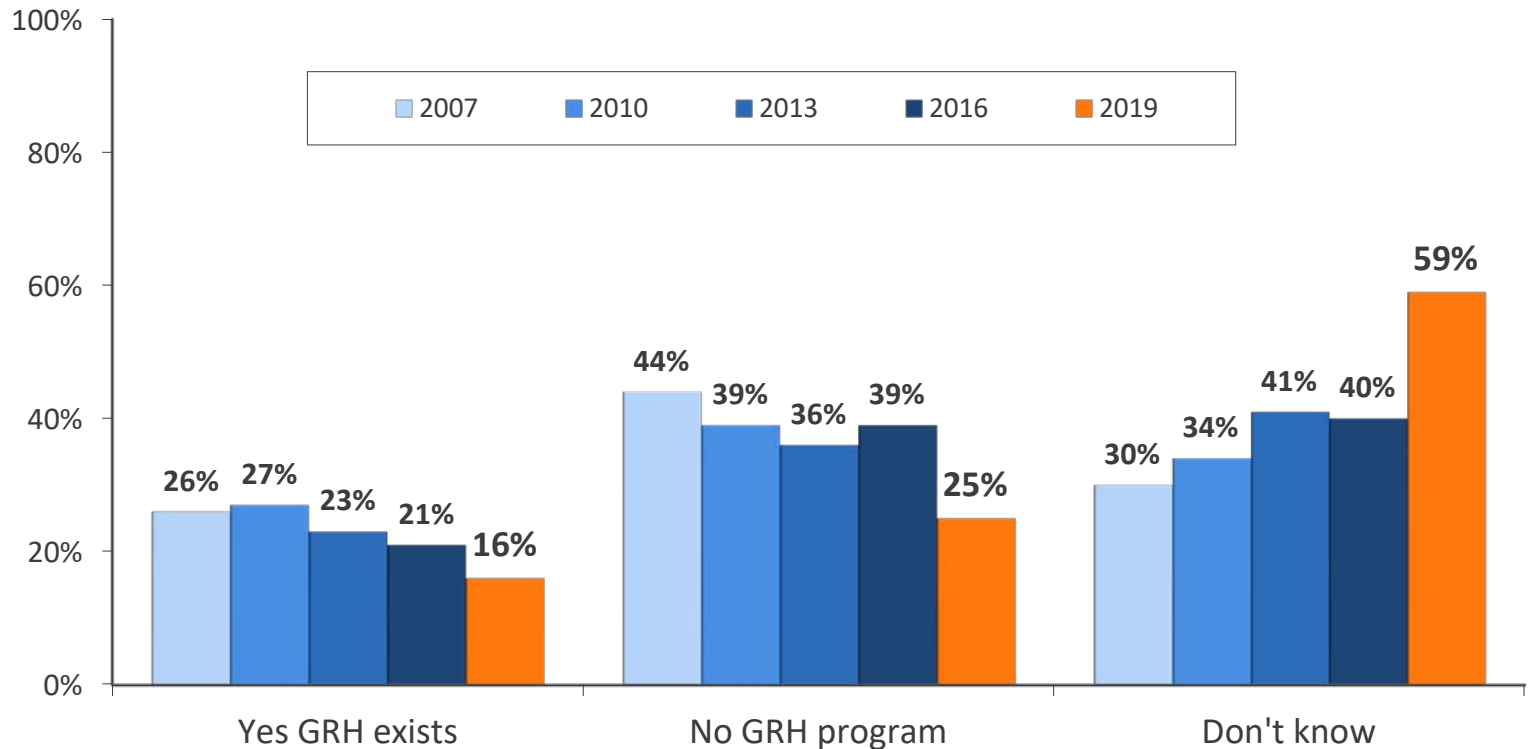
2013 SOC
n = 6,335

2016 SOC
n = 5,903

16% of Commuters Knew There was a Regional GRH Program; 25% Said No Program, 59% Did Not Know

Awareness of GRH has declined somewhat since 2010

Of commuters who said GRH existed, 26% named Commuter Connections as the sponsor; 61% did not know the sponsor



2007 SOC
n = 6,071

2010 SOC
n = 6,084

2013 SOC
n = 5,738

2016 SOC
n = 5,266

2019 SOC
n = 7,974

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?

Awareness of Local Commute Services Ranged from 9% to 51%; 9 of 11 Programs Increased Awareness in 2019

Use of local
commute
services
ranged from
1% to 13%

Prince William
n = 769

Frederick
n = 711

Loudoun
n = 760

Arlington
n = 1,220

Fairfax
n = 1,534

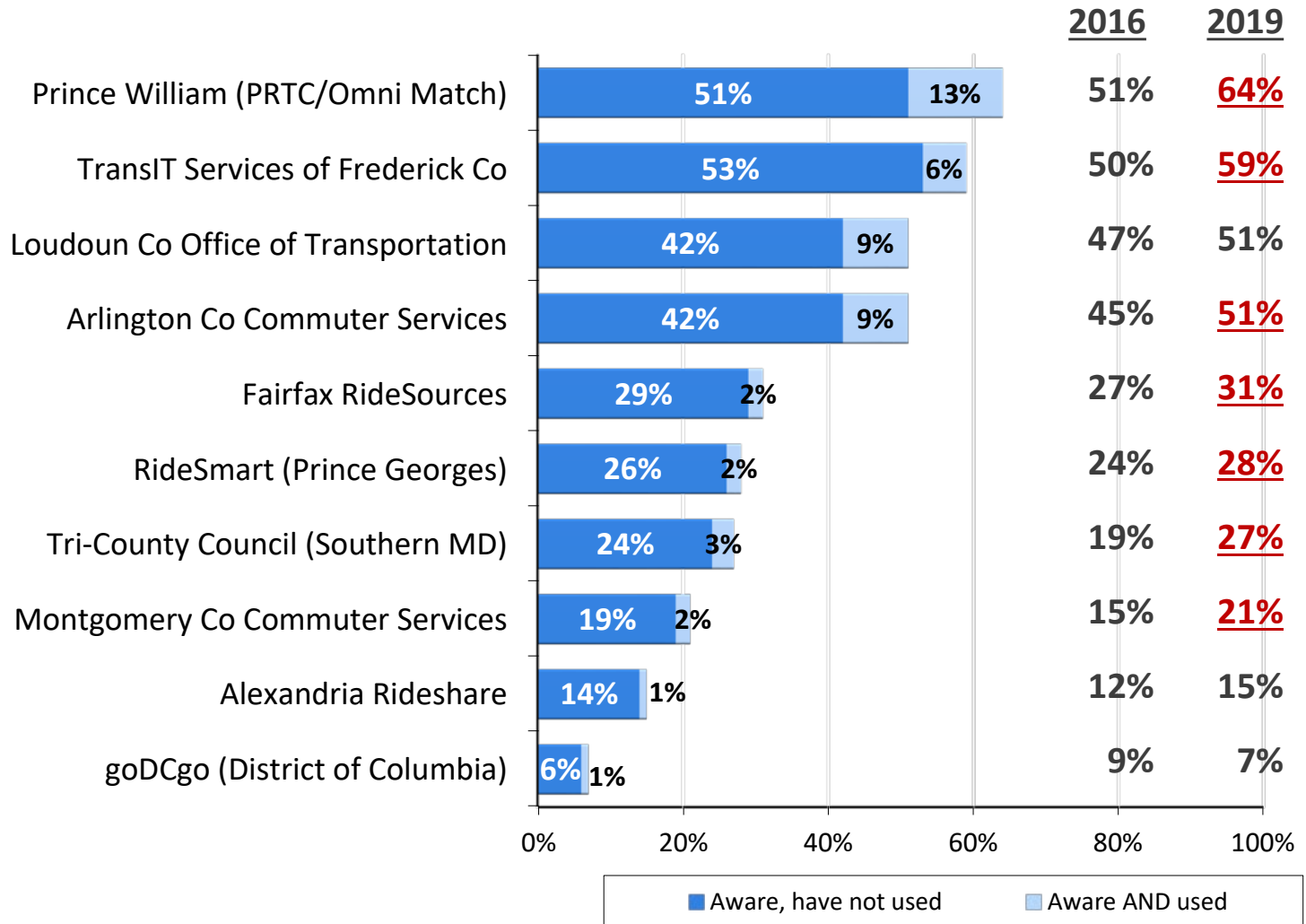
Prince George's
n = 1,316

So. Maryland
n = 1,443

Montgomery
n = 1,330

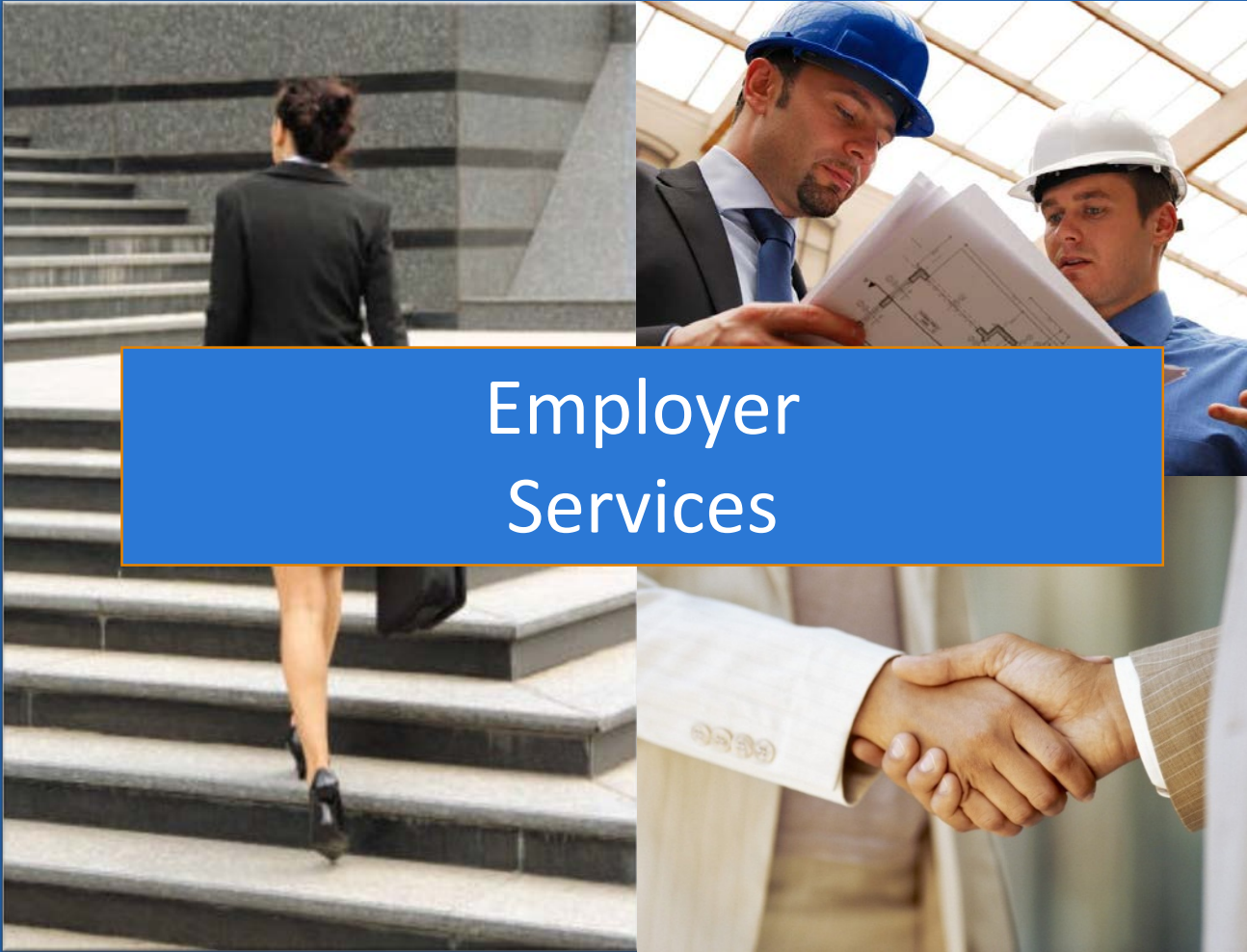
Alexandria
n = 908

District of
Columbia
n = 2,845



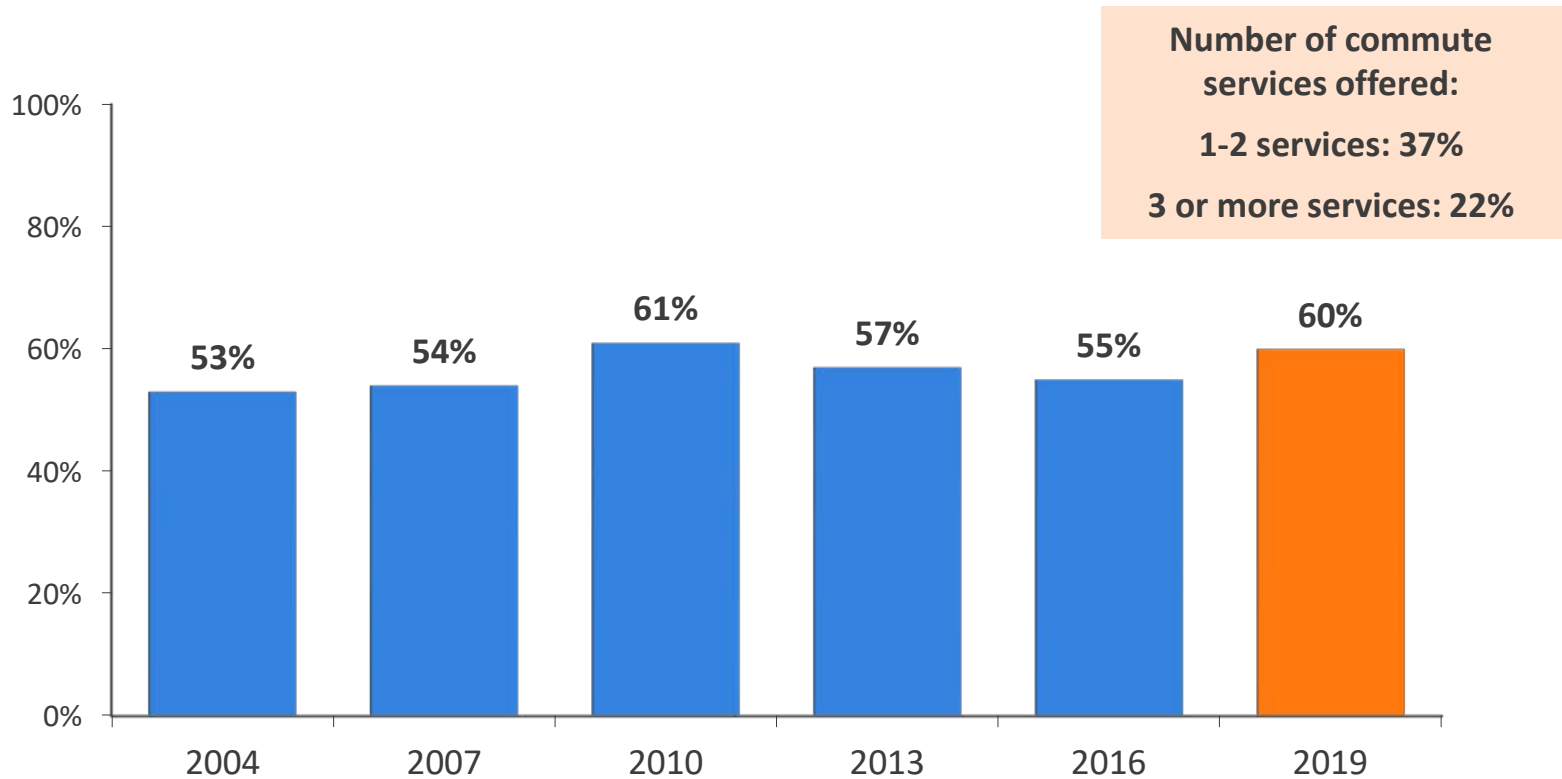
Q88d. Have you heard of an organization called []?

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



60% of Respondents Said their Employers Offered Commute Services at the Workplace

Availability was higher in 2019 than in 2013 (57%) and 2016 (55%); suggesting service cuts made during the recession have been reversed



2004 SOC
n = 6,866

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

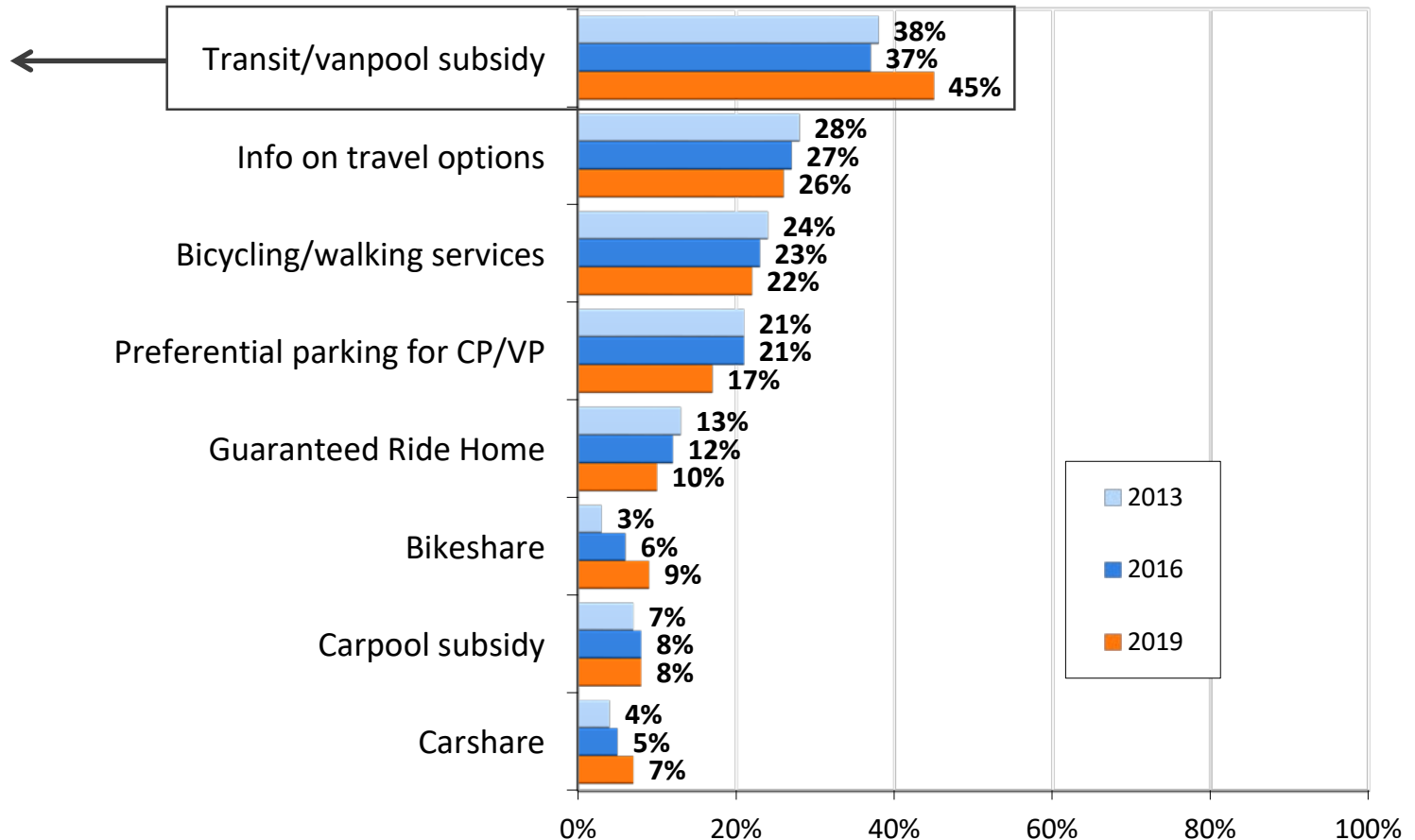
Q89 Next please tell me if your employer makes any of the following commute services or benefits available to you and, if they are available, have you used them. How about.... ,?

Transit/Vanpool Subsidy Was Most Widely Available Service in 2019 (45% of Respondents)

Availability of TR/VP subsidy increased 8 percentage points from 2016; Availability of carshare and bikeshare also increased

Transit/Vanpool Subsidies

- 31% Pre-tax deduction (employee-paid)
- 26% Direct cash payment (employer-paid)
- 10% SmarTrip card or voucher
- 33% Unknown



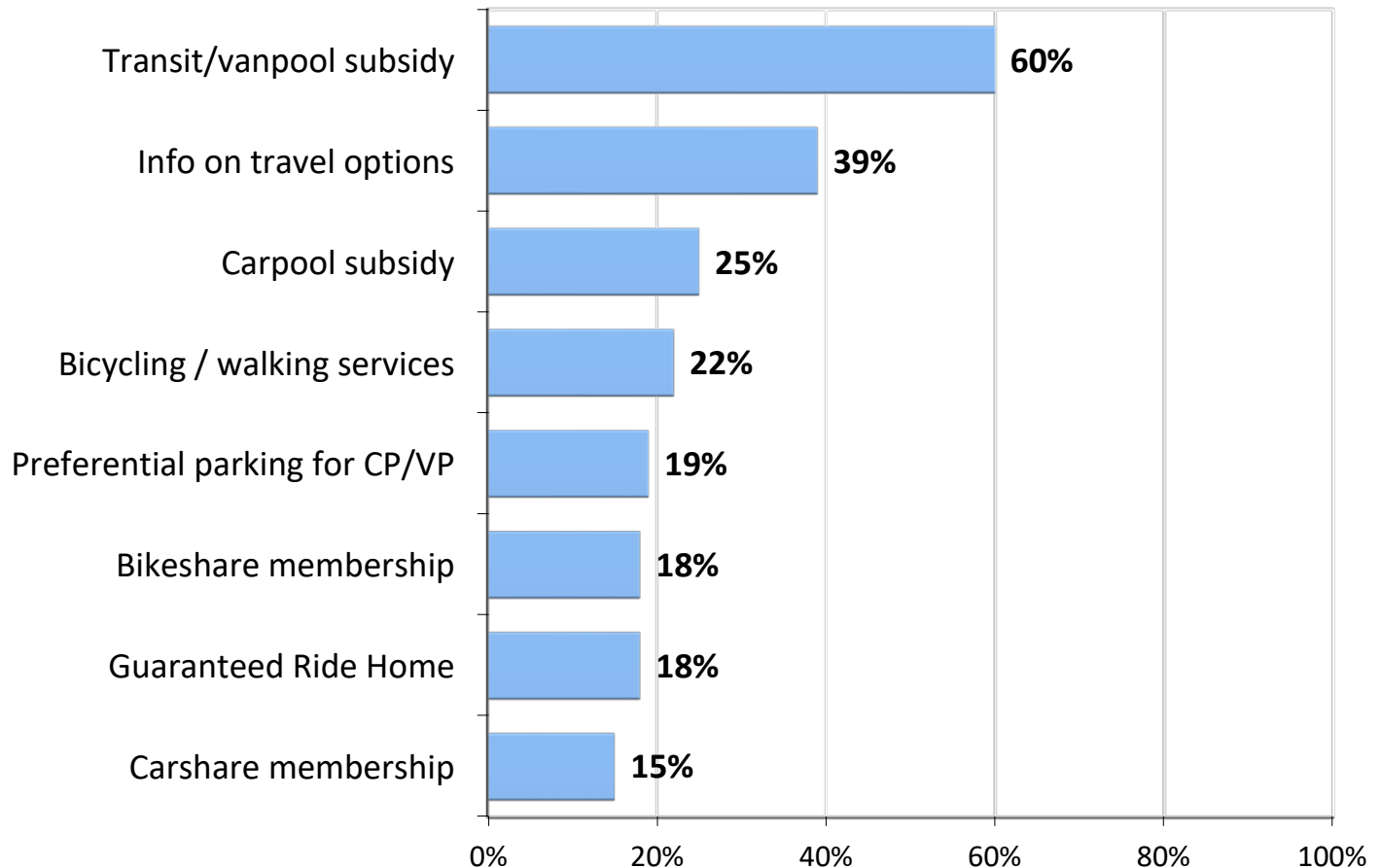
2013 SOC
n = 5,524

2016 SOC
n = 5,086

2019 SOC
n = 7,991

Q89 Please indicate in the table below if your employer makes any of the following commute services or benefits available to you to help with your commute, and if so, if you have used the services. ?

Transit/VP Subsidy Also Was Most Widely USED Employer Service – by 60% of respondents with access to the service
 39% with access used travel option info and 25% used carpool subsidy; other services used by about two in ten with access



Q89 Please indicate in the table below if your employer makes any of the following commute services or benefits available to you to help with your commute, and if so, if you have used the services. ?

Transit/vanpool subsidy n = 3,568

Info on travel options n = 2,158

Carpool subsidy n = 639

Bike/walk services n = 1,928

Preferential parking n = 1,460

Bikeshare n = 708

GRH n = 852

Carshare n = 471



Questions?

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