

2022 STATE OF THE COMMUTE SURVEY - HIGHLIGHTS

Commuter Connections TDM Evaluation

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Survey Background

- Eighth triennial survey (2001, 04, 07, 10, 13, 16, 19, 2022)
- Interviewed 8,396 employed residents of COG region (95% +/- 1.1%)
- Address-based sample 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
- Jurisdiction counts ranged from 511 –971 (95% +/- 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

SOC 2022 Survey Topics

Continued tracking questions

- Current/past commute patterns
- Telework
- Commute satisfaction, commute ease
- Work/home location moves and impact on commute
- Access to transit, HOV/Express lanes, P&R
- Commute advertising awareness and influence
- Awareness of CC, regional and local commute services
- Employer commute assistance
- Technology initiatives and driverless cars

New questions in 2022

- Commute and TW before pandemic (early 2020)
- Pandemic significance on commute changes
- Telework experience

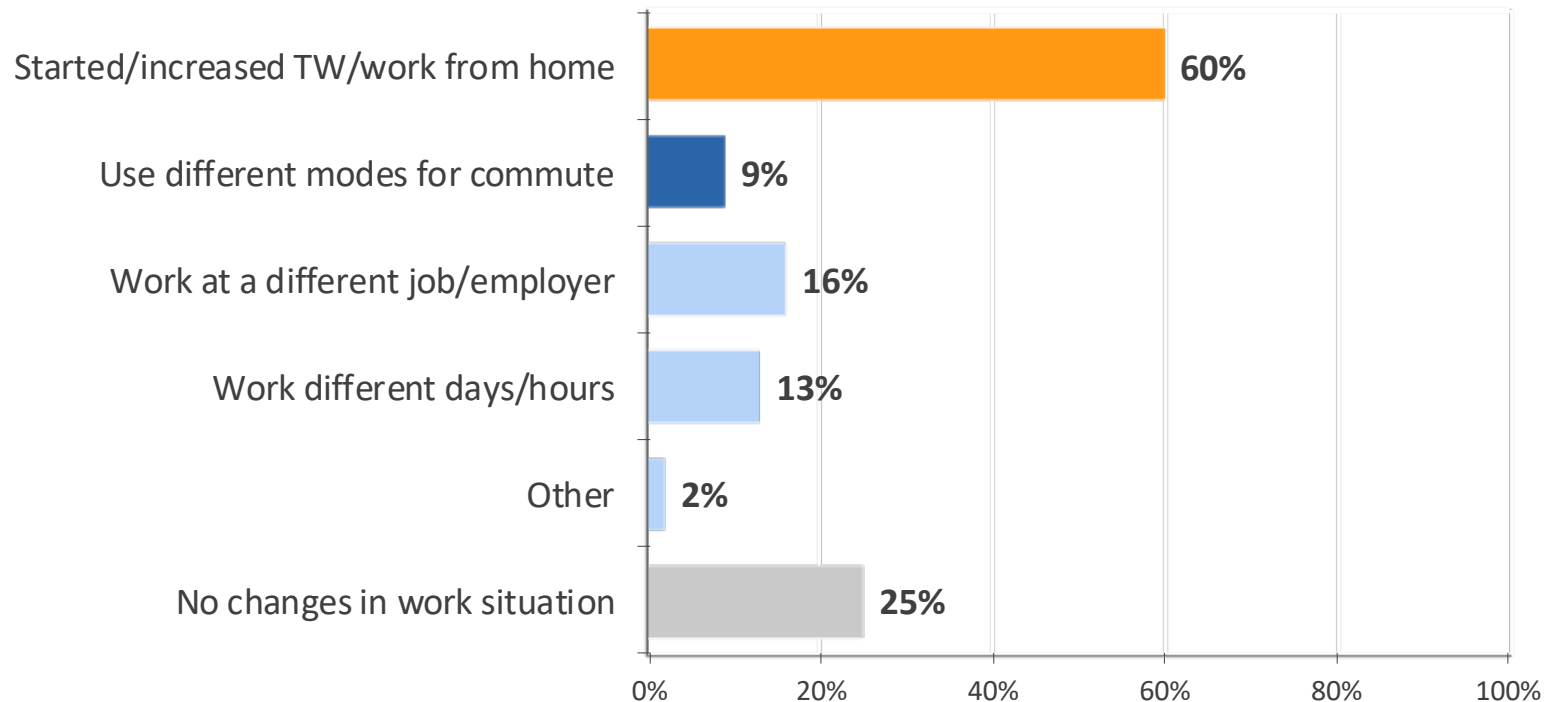
Coronavirus Pandemic Disruptions To Commute Patterns

Many aspects of commuting changed but some stayed surprisingly consistent

- Widespread commute disruptions
- Telework explosion!
- Increased use of drive alone for commute trips when not teleworking
- 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

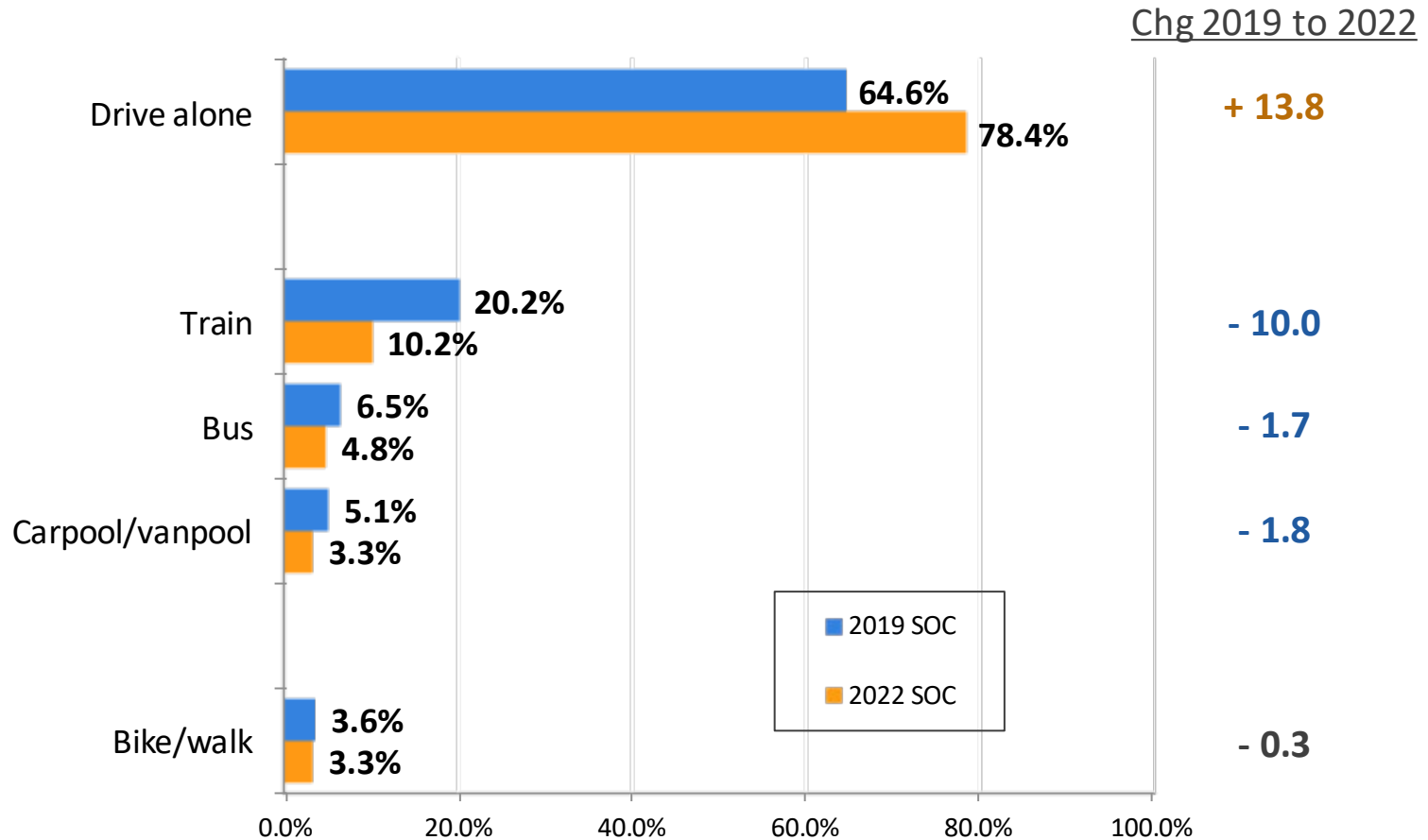
Worker Commute Changes

- 60% started or increased telework (32% shifted to full-time telework).
- Almost one in ten changed the travel mode on days they commute.
- Almost three in ten made change in their work arrangement



Weekly Commute Trips By Mode: Trend

Excluding teleworking as a travel mode, substantive change in commuting trend



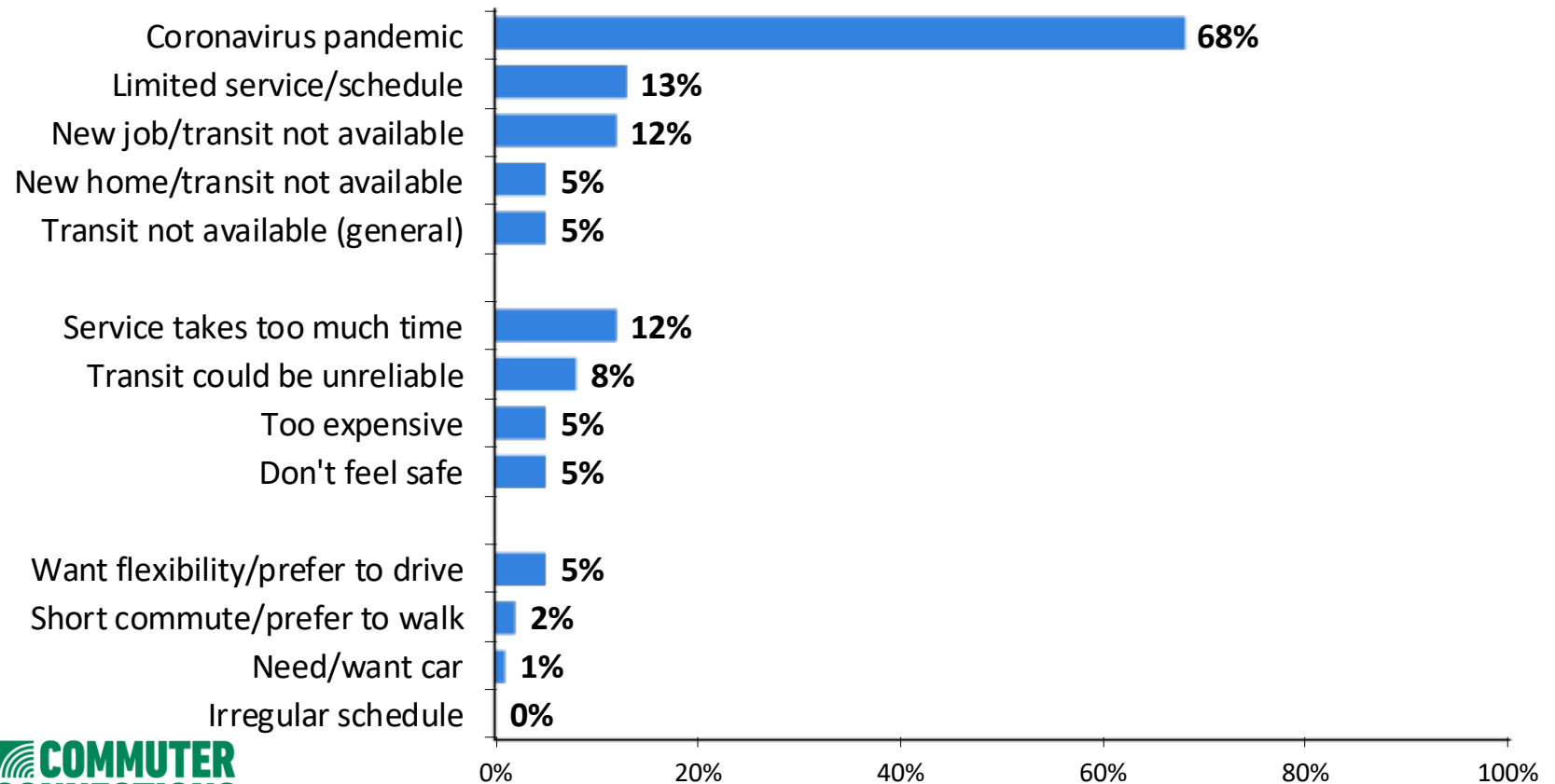
Changes in Commute Mode

- All non-drive alone modes of commuting lost commuters that switched to either telework OR to driving alone

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%

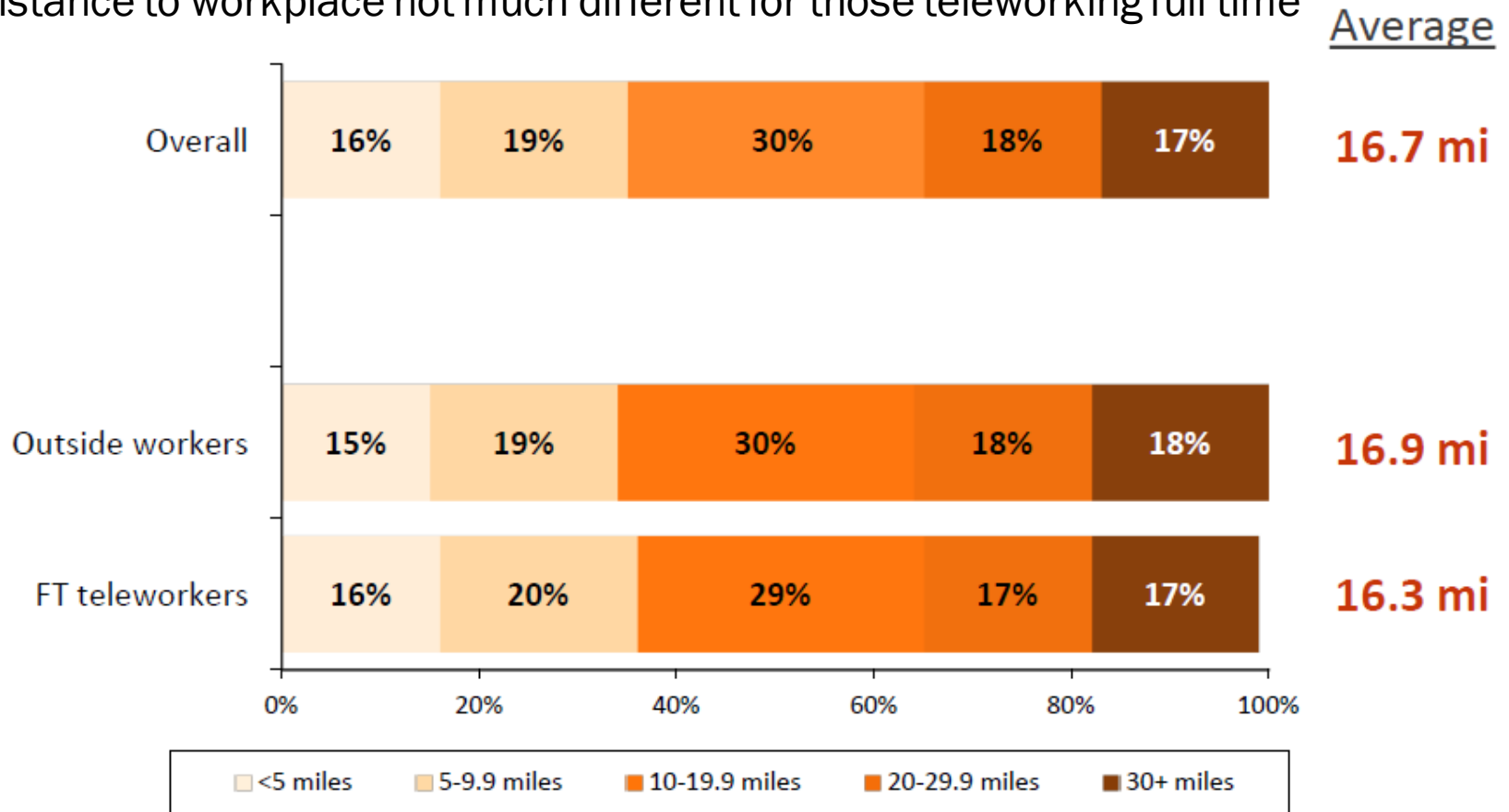
Reasons For Discontinuing Transit Use

- Pandemic related concerns by far main reason (68%)
- Limited Service/Schedule Issues (some pandemic related) next highest (13%)
- Unavailability of transit at new job (12%)
- Service taking too much time (some non-pandemic 12%)



Commute Distance

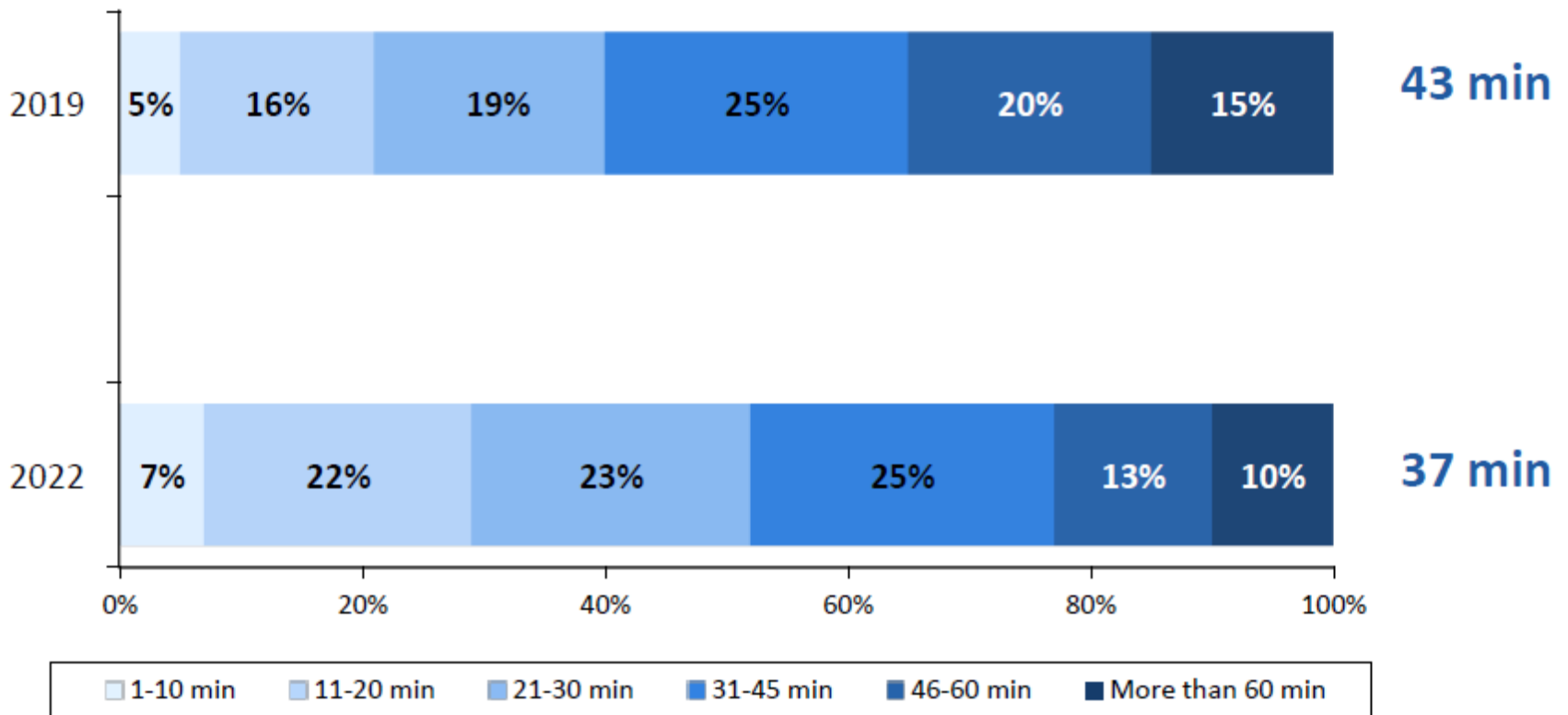
- Average for those not working from home 16.9 mi. similar to pre-pandemic (17.1 mi)
- Those teleworking avoided on average 16.3 mi of travel
- Distance to workplace not much different for those teleworking full time



Commute Time

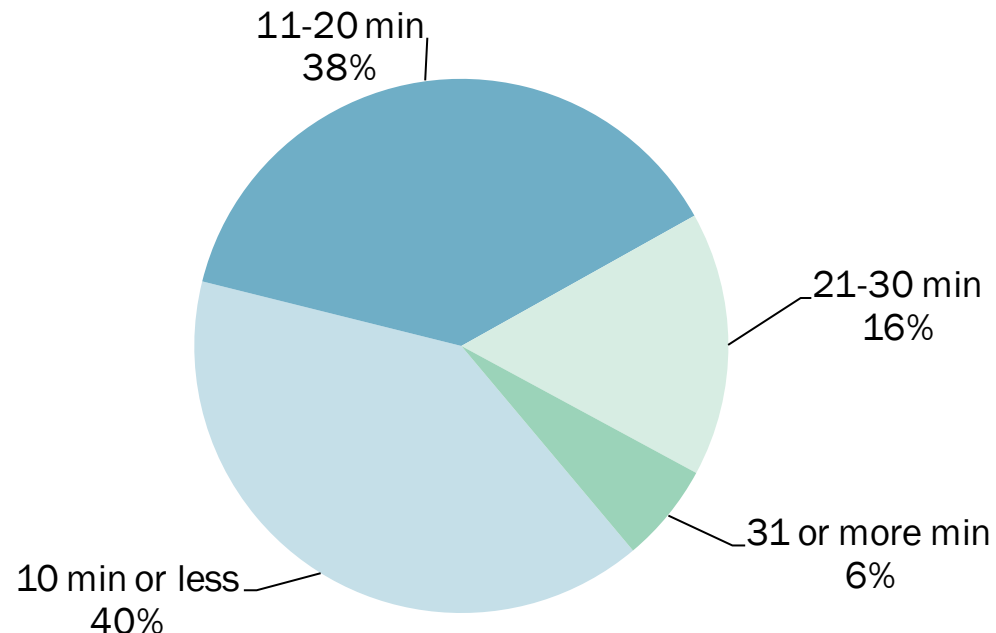
- Overall Average commute time dropped considerably
- Fewer commuters with commutes more than 45 minutes
- Large shift to telework likely cause for reduced commute times

Average



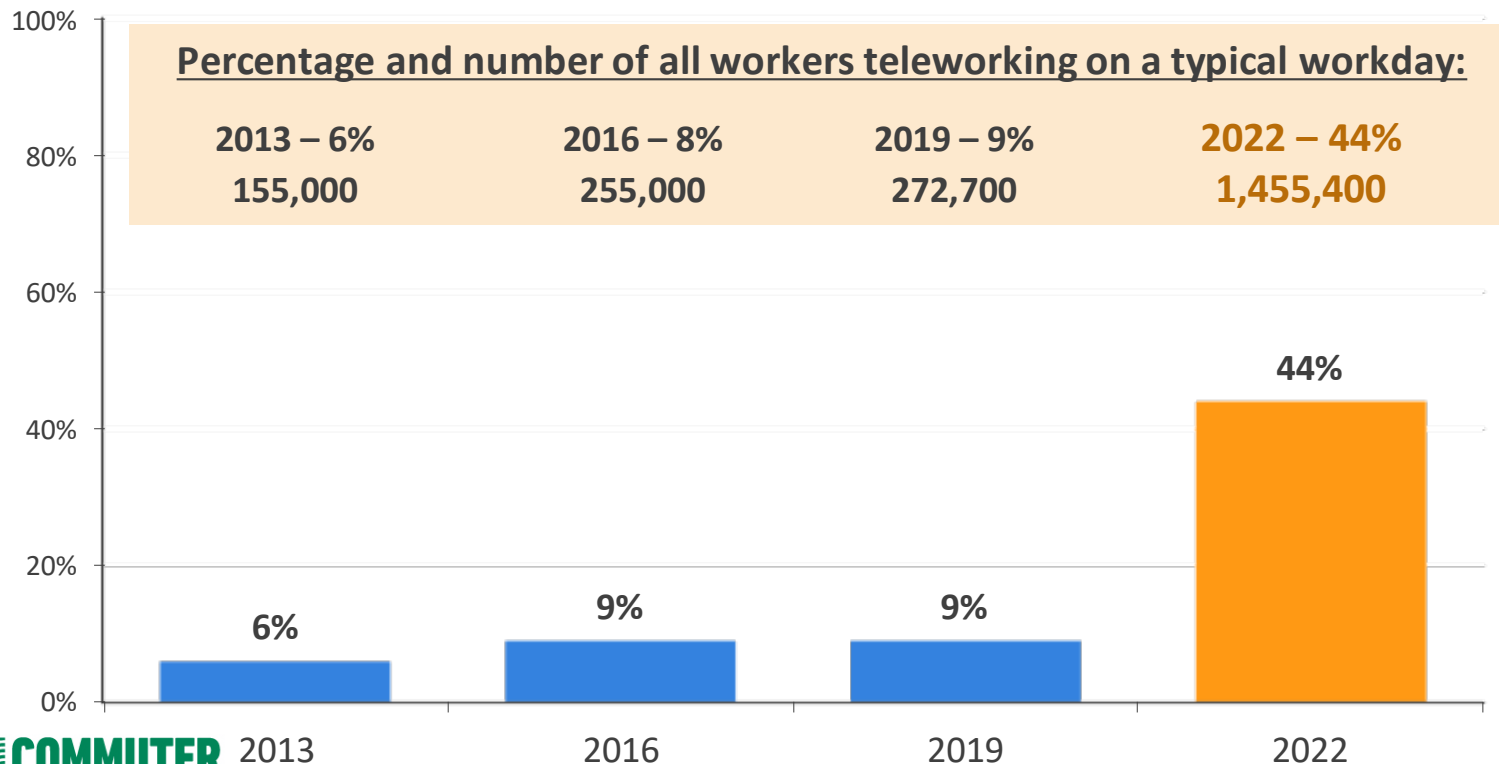
HOV and Express Lanes Time Savings

- About 60% of HOV/HOT lane users cite time savings of 11 to more than 30 minutes
- A bit more than 1 in 5 cite time savings of more than 20 minutes



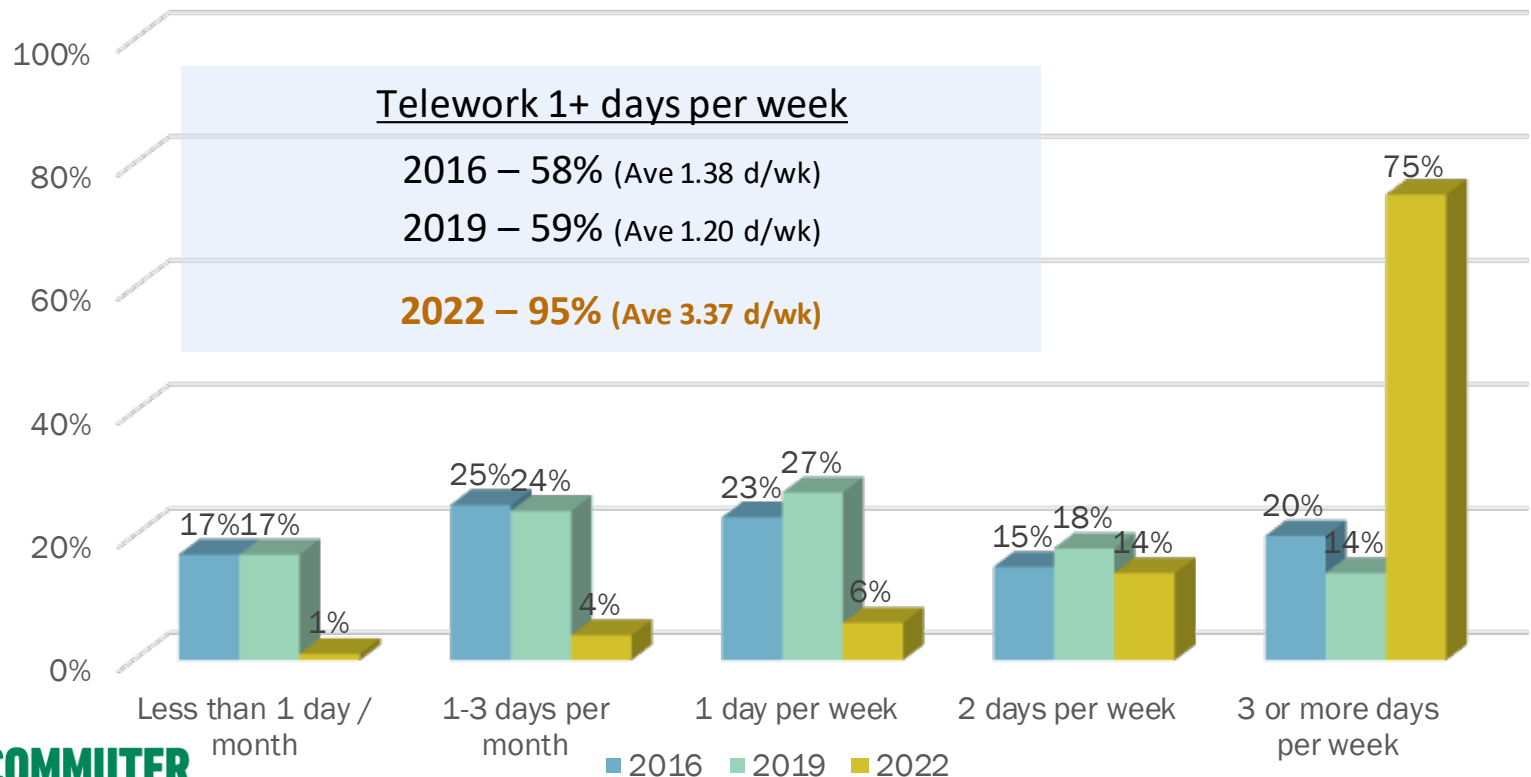
Number of Telecommuters/Teleworkers

- Typical Workday Telework has increased dramatically
 - Almost fivefold increase since 2019
 - Nearly 1.5 Million Regional Workers Telework on a Typical Workday



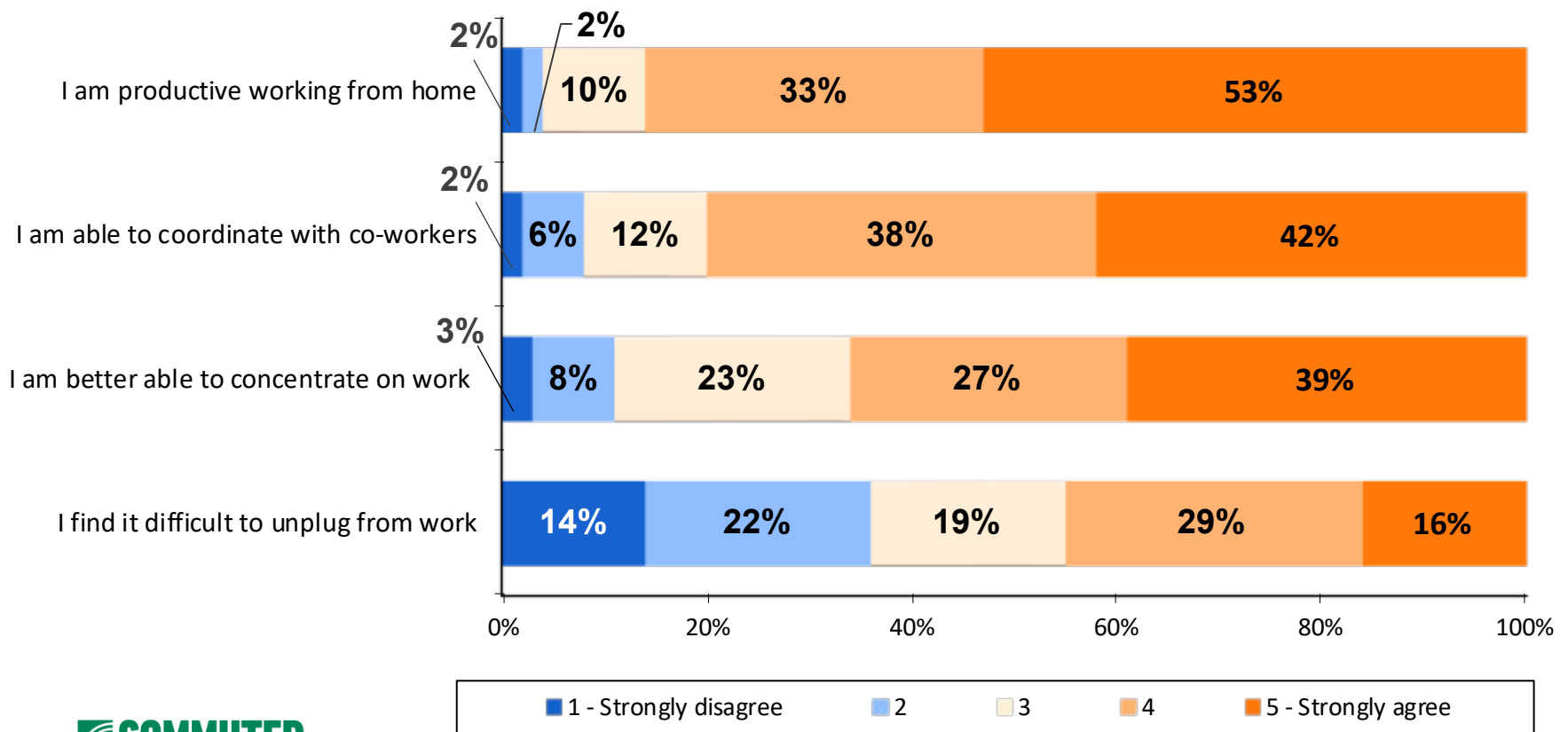
Telework Frequency

- Average Frequency of Weekly Telework almost tripled since 2019
 - From 1.2 days/week to 3.4 days/week
- Three quarters of teleworkers now telework 3 or more days / week
- Only 6% of teleworkers telework 1 day a week



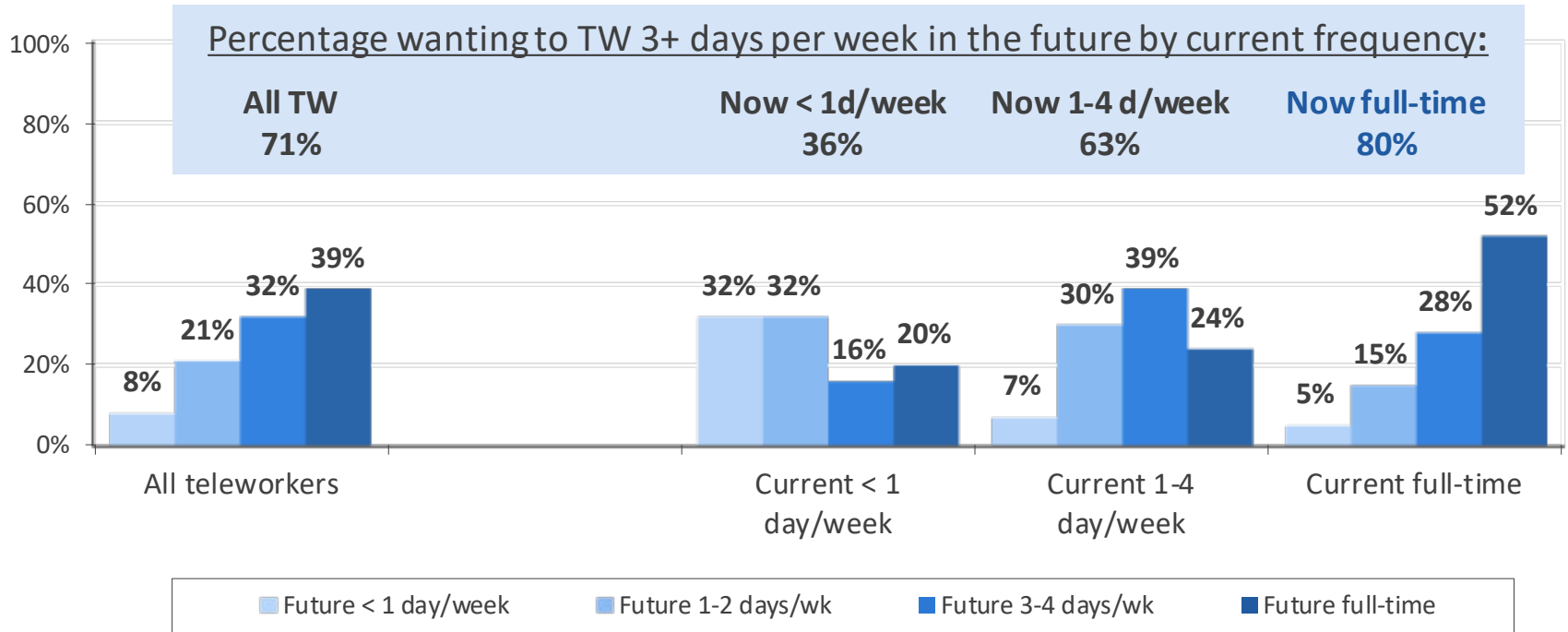
Teleworking Experience

- At least 80% of Teleworkers reported being more productive and able to coordinate with co-workers
- 45% of Teleworkers reported difficulty “unplugging” from work



Future Teleworking

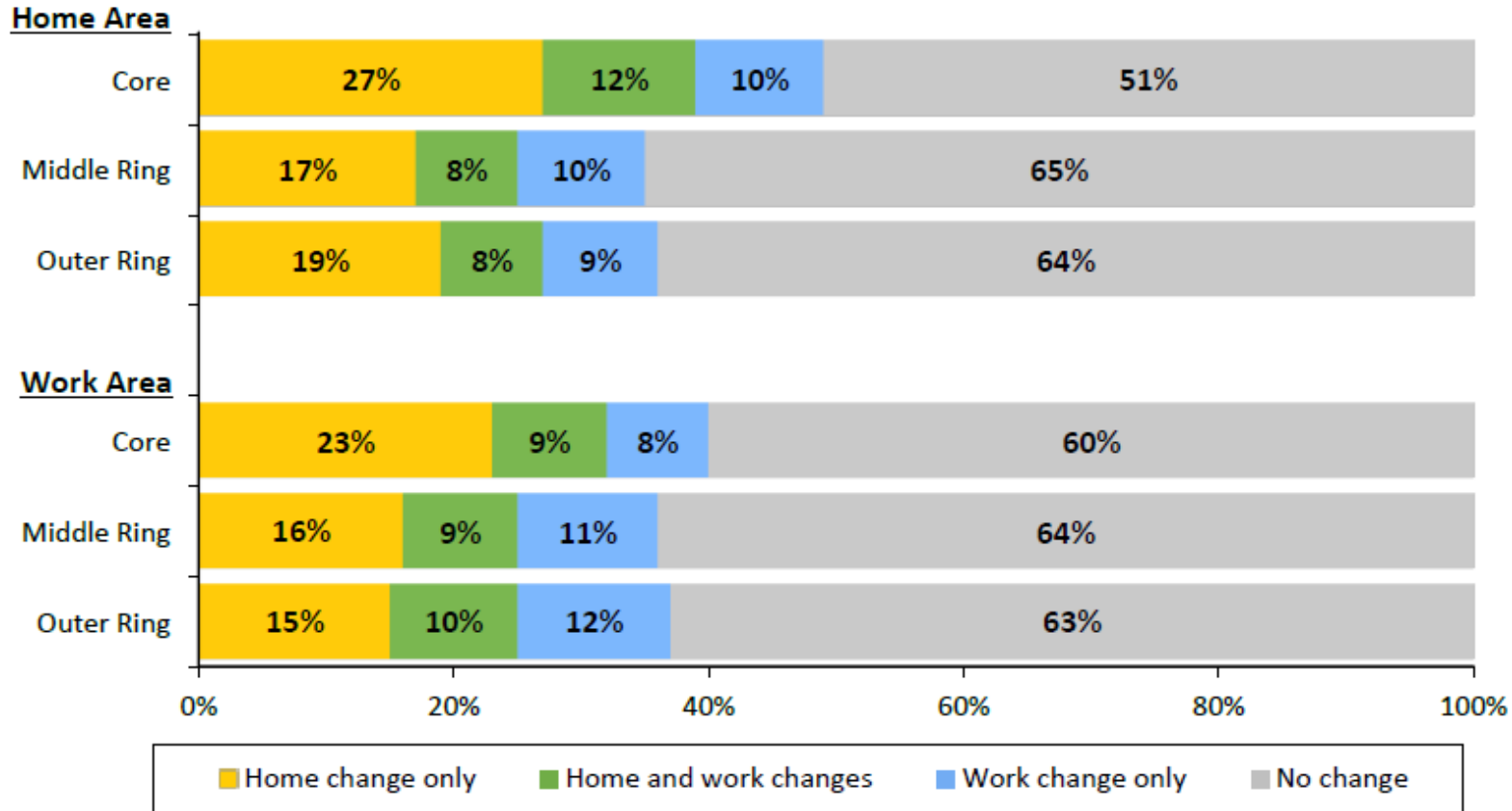
- 71% of all current Teleworkers would like to Telework 3 or more days a week
- 36% of commuters teleworking less than 1 day/week would like to Telework 3 or more days/week
- About 25% of commuters teleworking 1-4 days/week would like to Telework full-time



Work / Home Locational Changes

- Residents in the region's core areas changed their work and home locations in greater proportion than those in the inner and outer jurisdictions

(Work Area – Core n = 3,982, Middle Ring n = 2,700, Outer Ring n = 931)



Location Changes

2019 vs 2022

Home Location

11% in 2019

19% in 2022

Work Location

13% in 2019

10% in 2022

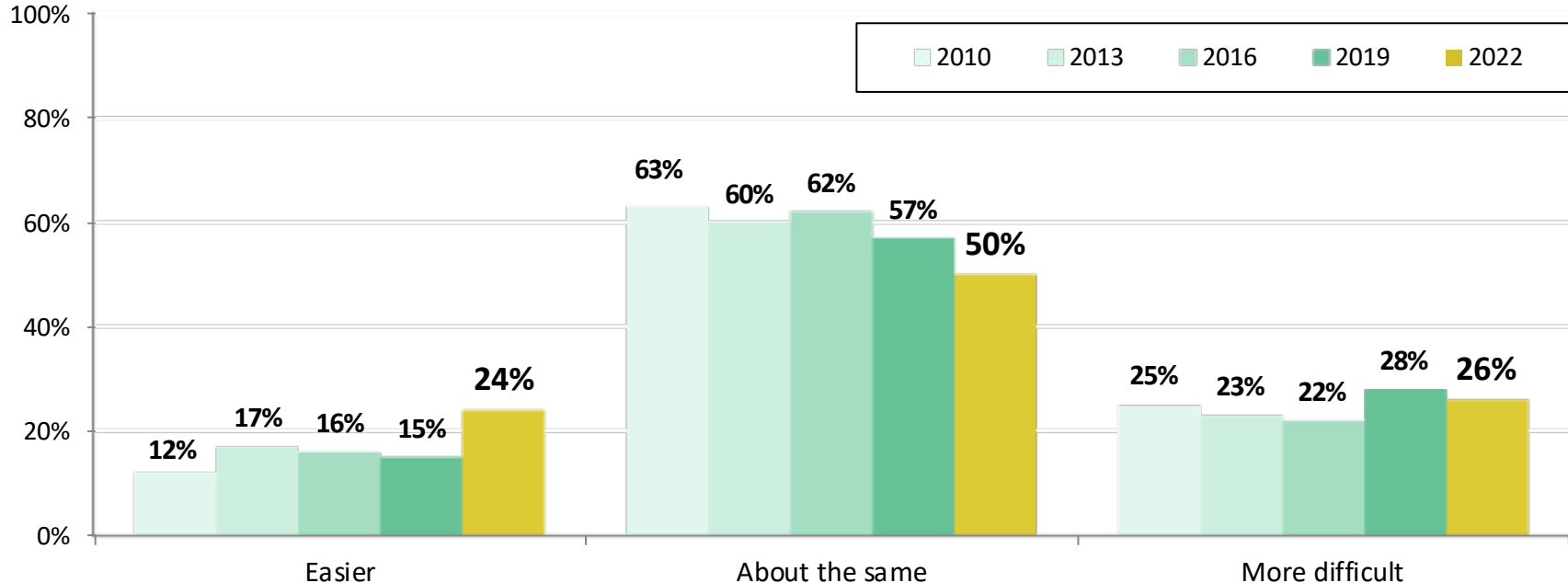
Home and Work Location

7% in 2019

9% in 2022

Commute Ease

- More commuters reported easier commute / Fewer reported difficult commute
- Commuters in region's core area reported more difficult commute than those in inner jurisdiction (33% Vs 24%)
- Significantly higher proportion of transit commuters reported difficult commute (42% Bus, 50% Train)



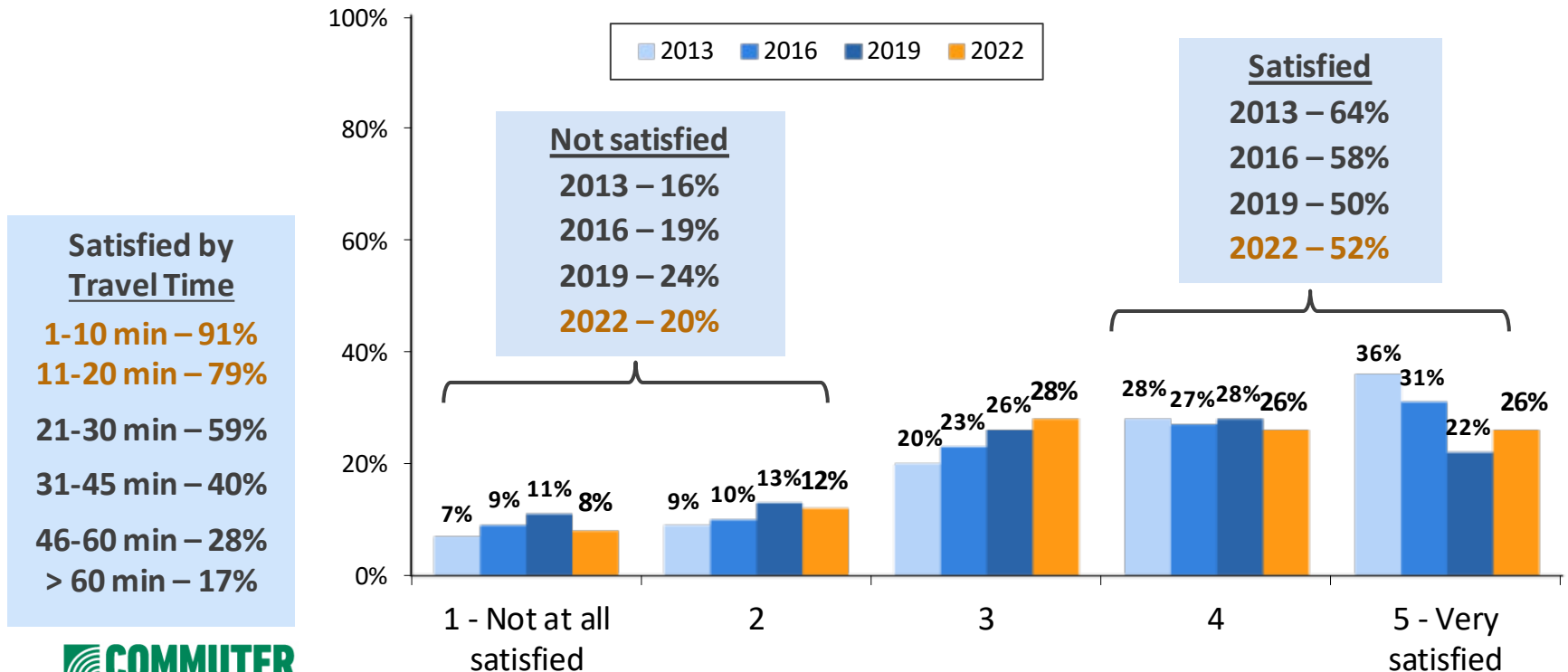
More Difficult Commute

Home Area: Inner Core – 33%, Middle Ring – 24%, Outer Ring – 35%

Commute Satisfaction by Location & Time

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

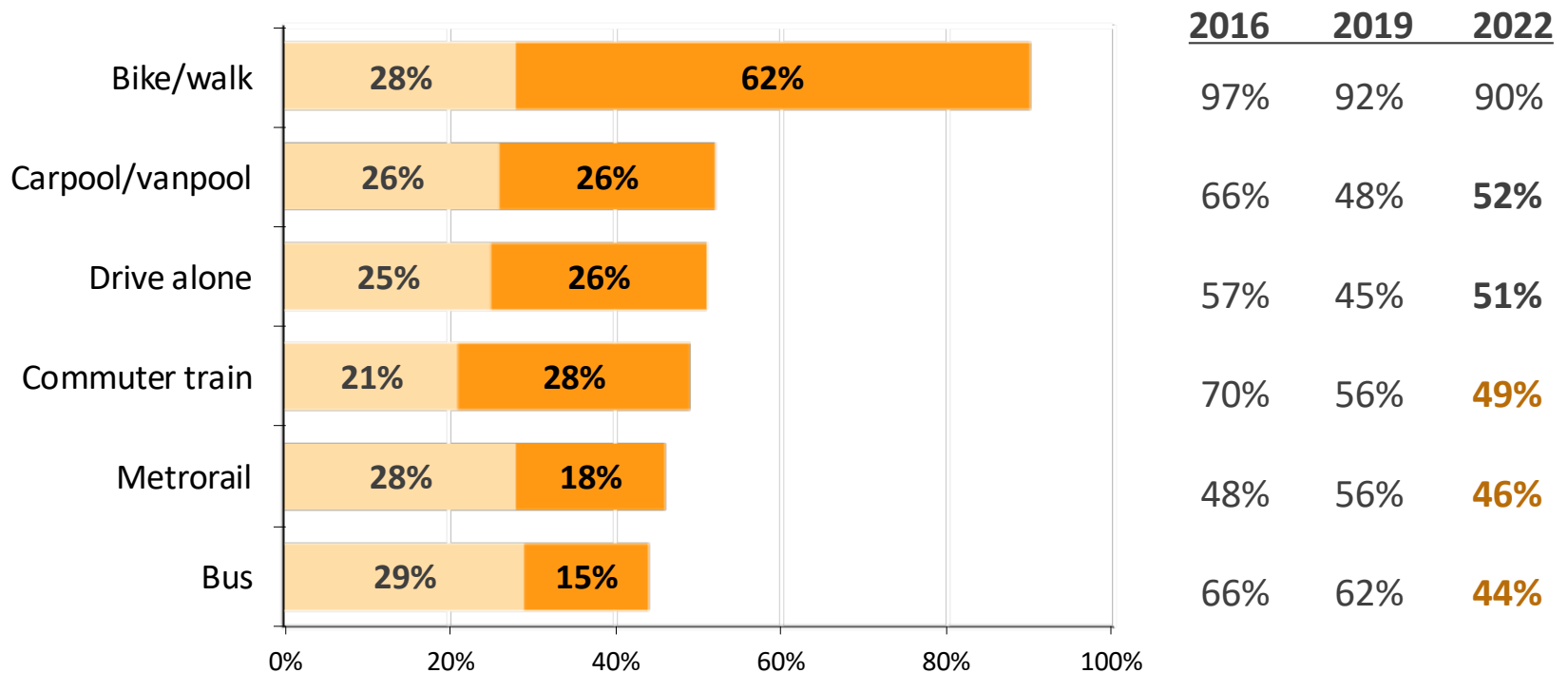
Core area residents were more satisfied (60%) than were Middle Ring (54%) or Outer Ring (45%) residents; Satisfaction dropped as travel time increased.



Commute Satisfaction by Mode

Bikers/Walkers Were Most Satisfied; Metrorail & 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



Next Steps

- Received and Reviewed Comments on Technical Report which was reviewed endorsed for release by the Commuter Connections Subcommittee
- Finalize Technical Report
- Prepare General Public Report and Topic Summary brochures for distribution

Access Draft Technical Report at this [link](#).

Additional Summary findings including Marketing and Brand Awareness and Automated Transportation at this [link](#).

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