



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 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

New Sections for 2013

- Roads used along commuting route
- Work activities performed during commute
- Interest in dynamic rideshare services

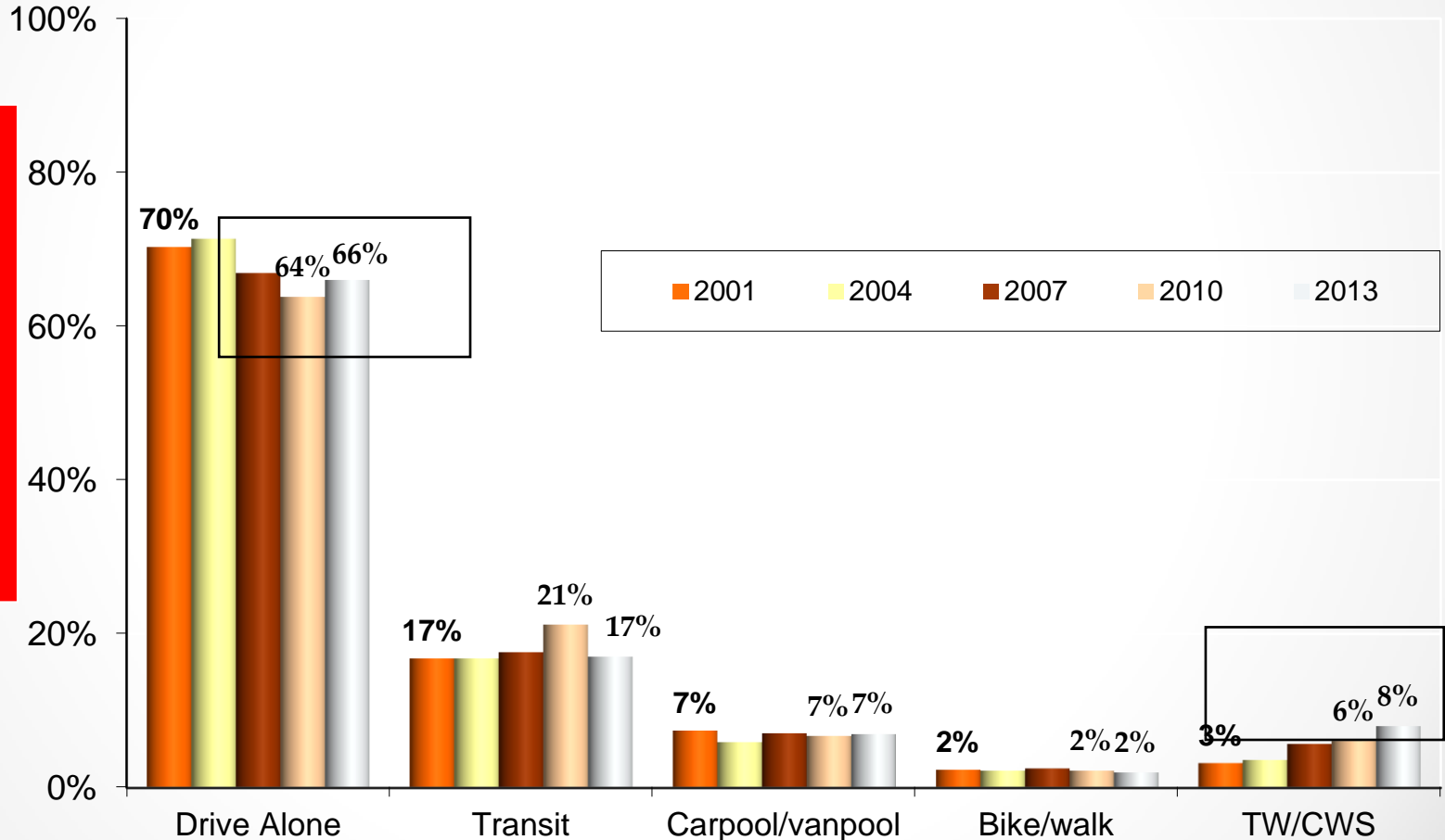


Preliminary Highlights

- 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



2001 SOC
n = 6,924

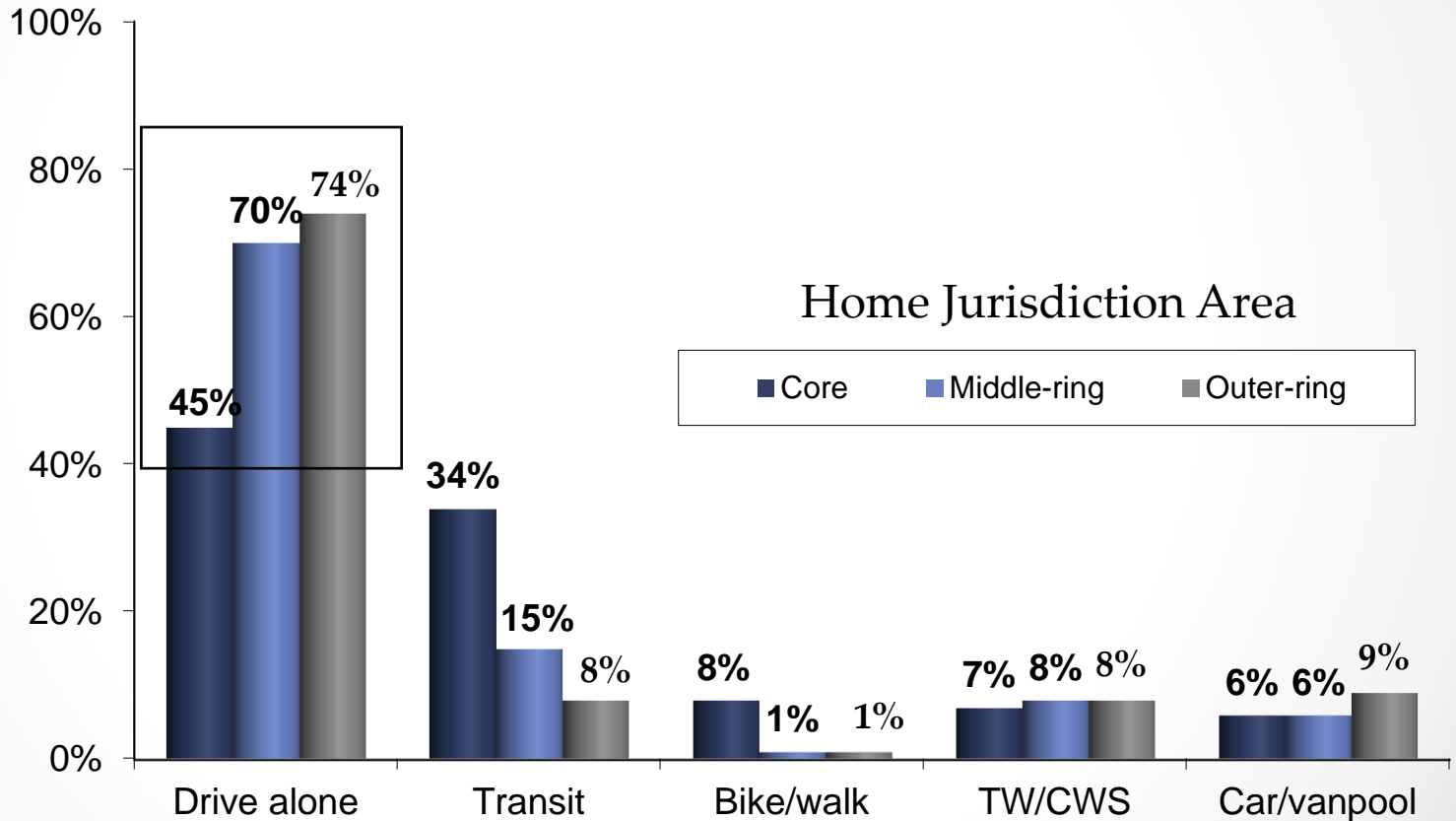
2004 SOC
n = 6,851

2007 SOC
n = 6,168

2010 SOC
n = 6,050

2013 SOC
N = 5,892

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

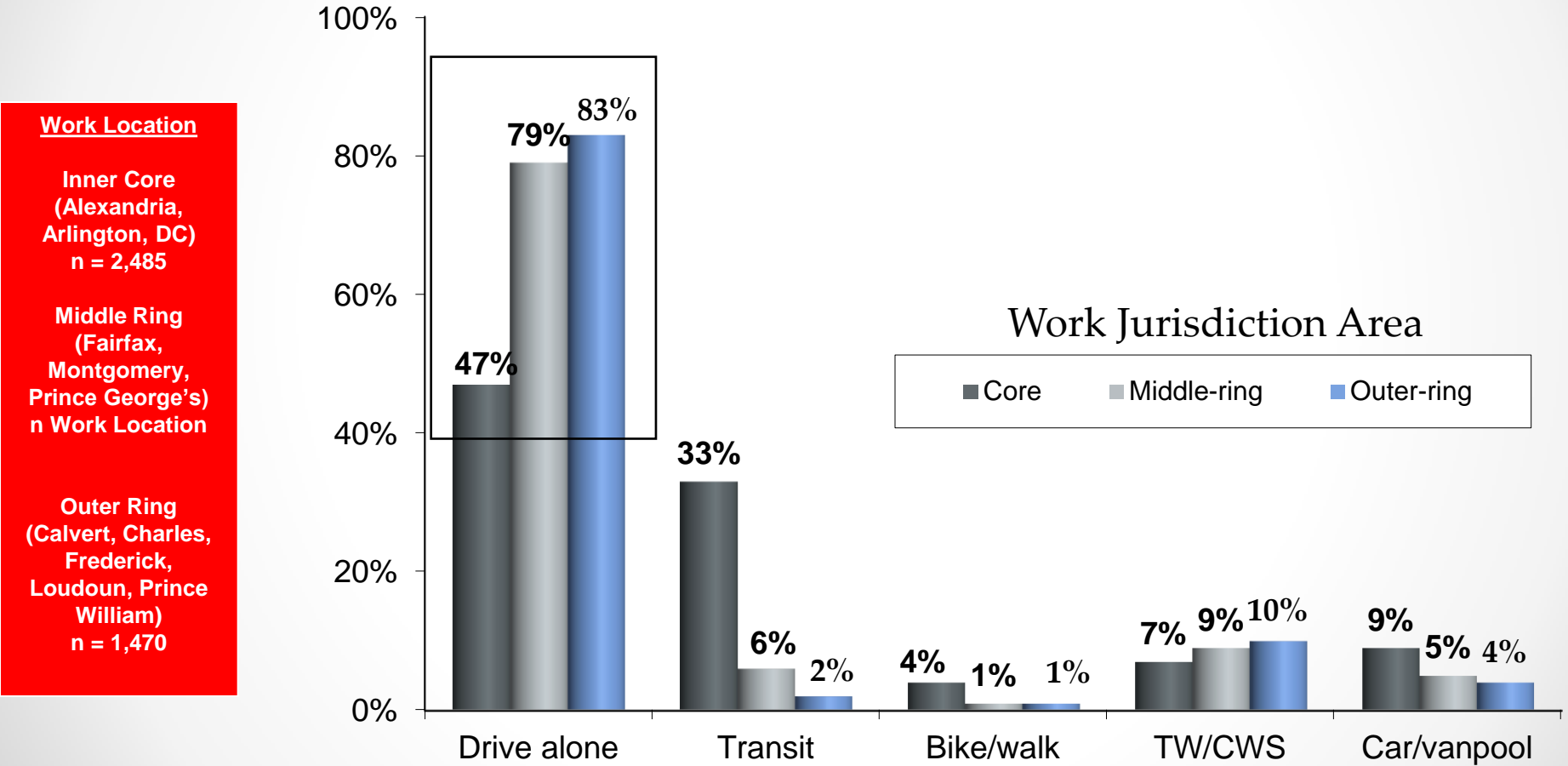
Inner Core
(Alexandria,
Arlington, DC)
n = 1,592

Middle Ring
(Fairfax,
Montgomery,
Prince George's)
n = 1,617

Outer Ring
(Calvert, Charles,
Frederick,
Loudoun, Prince
William)
n = 2,699

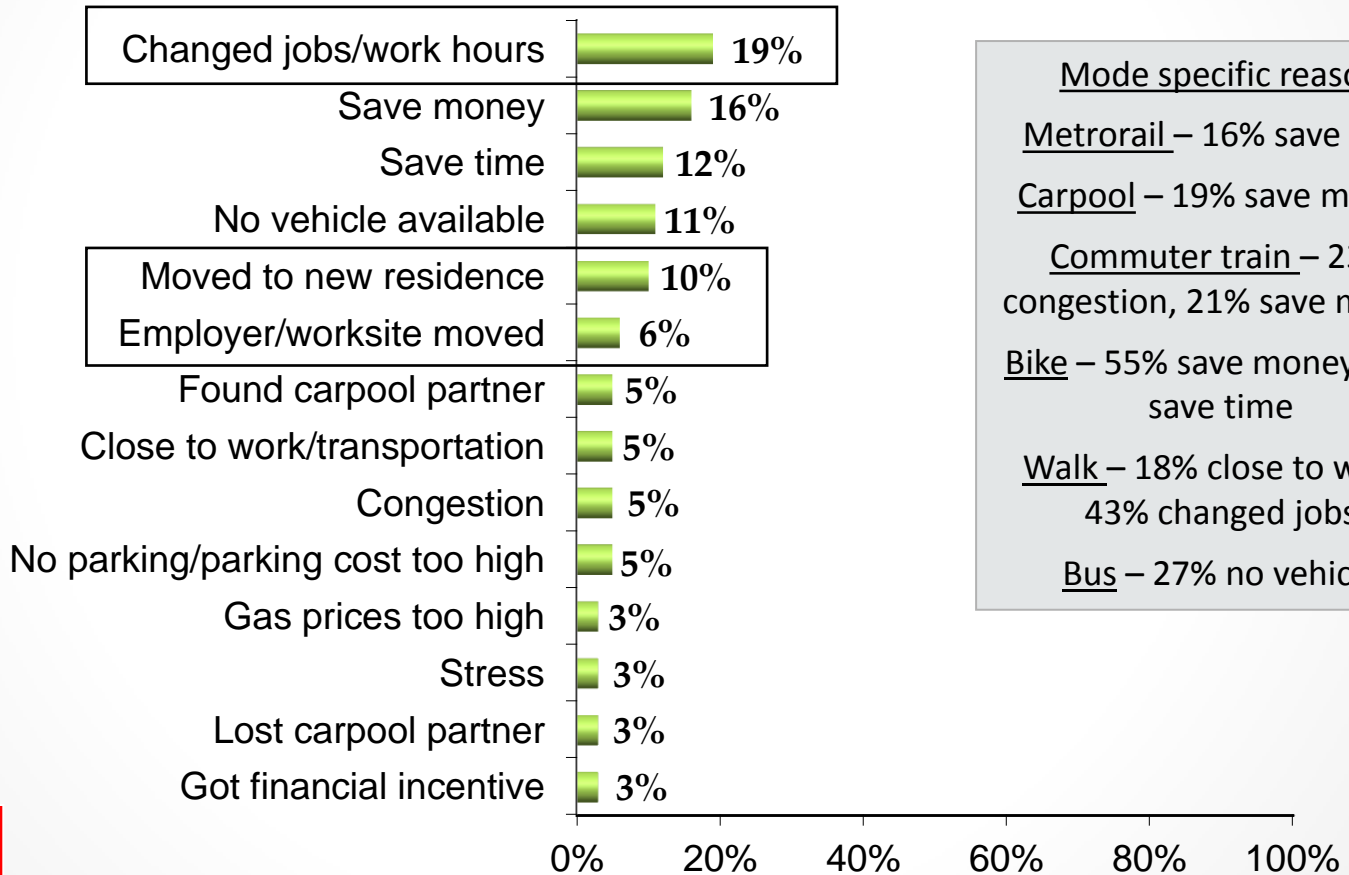
Commuters who Work in the Core Area Use Transit at a Much Higher Rate than do Commuters who Work in the Middle-Ring or Outer Ring

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



Q15. Now thinking about LAST week, how did you get to work each day. . .
Q3 Work jurisdiction area..

19% of Respondents Who Commute by an Alternative Mode Started Using the Modes because they Changed Jobs / Work Hours; 10% moved to a new residence and 6% said their worksite moved



Mode specific reason

Metrorail – 16% save time

Carpool – 19% save money

Commuter train – 23% congestion, 21% save money

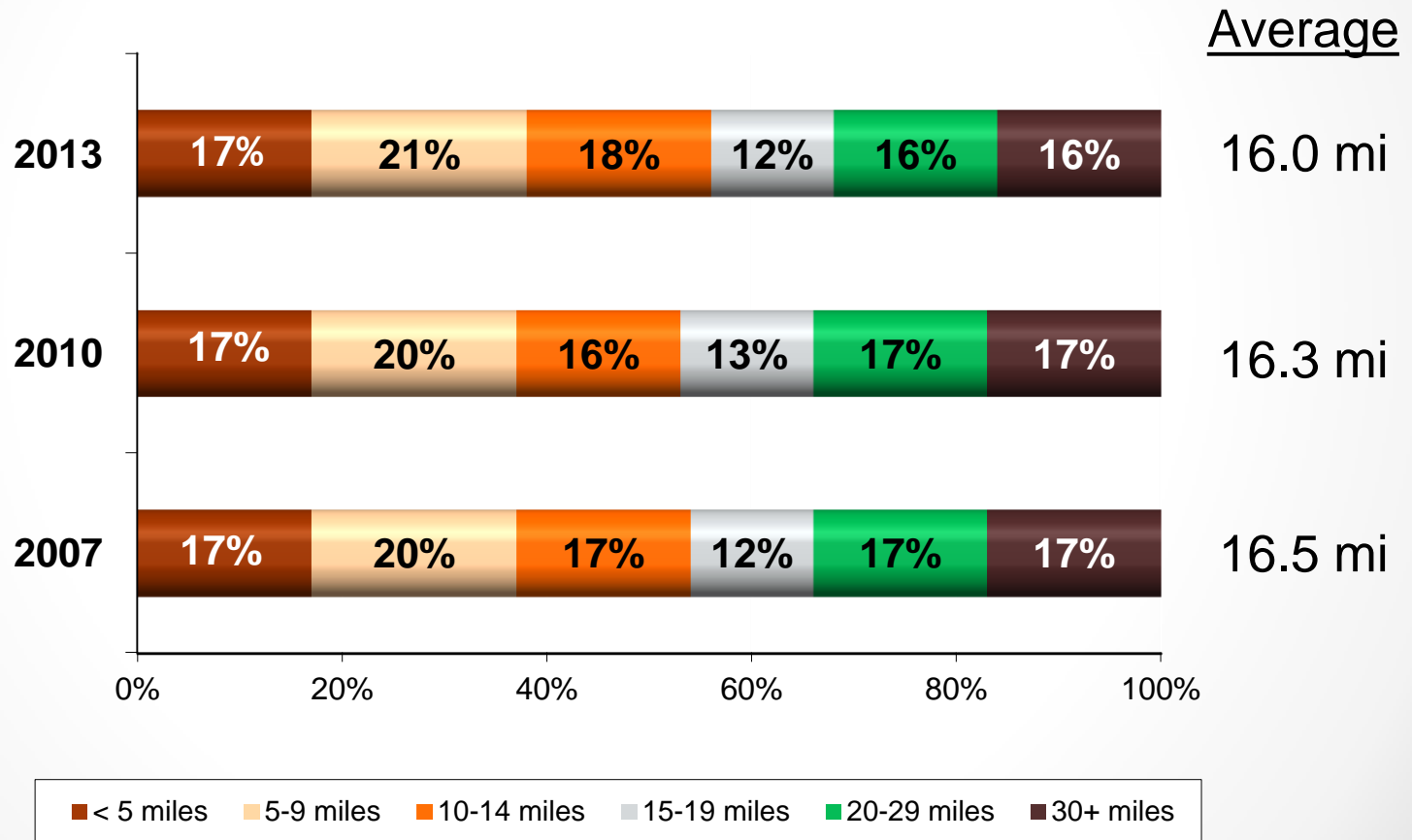
Bike – 55% save money, 53% save time

Walk – 18% close to work, 43% changed jobs

Bus – 27% no vehicle

n = 576

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



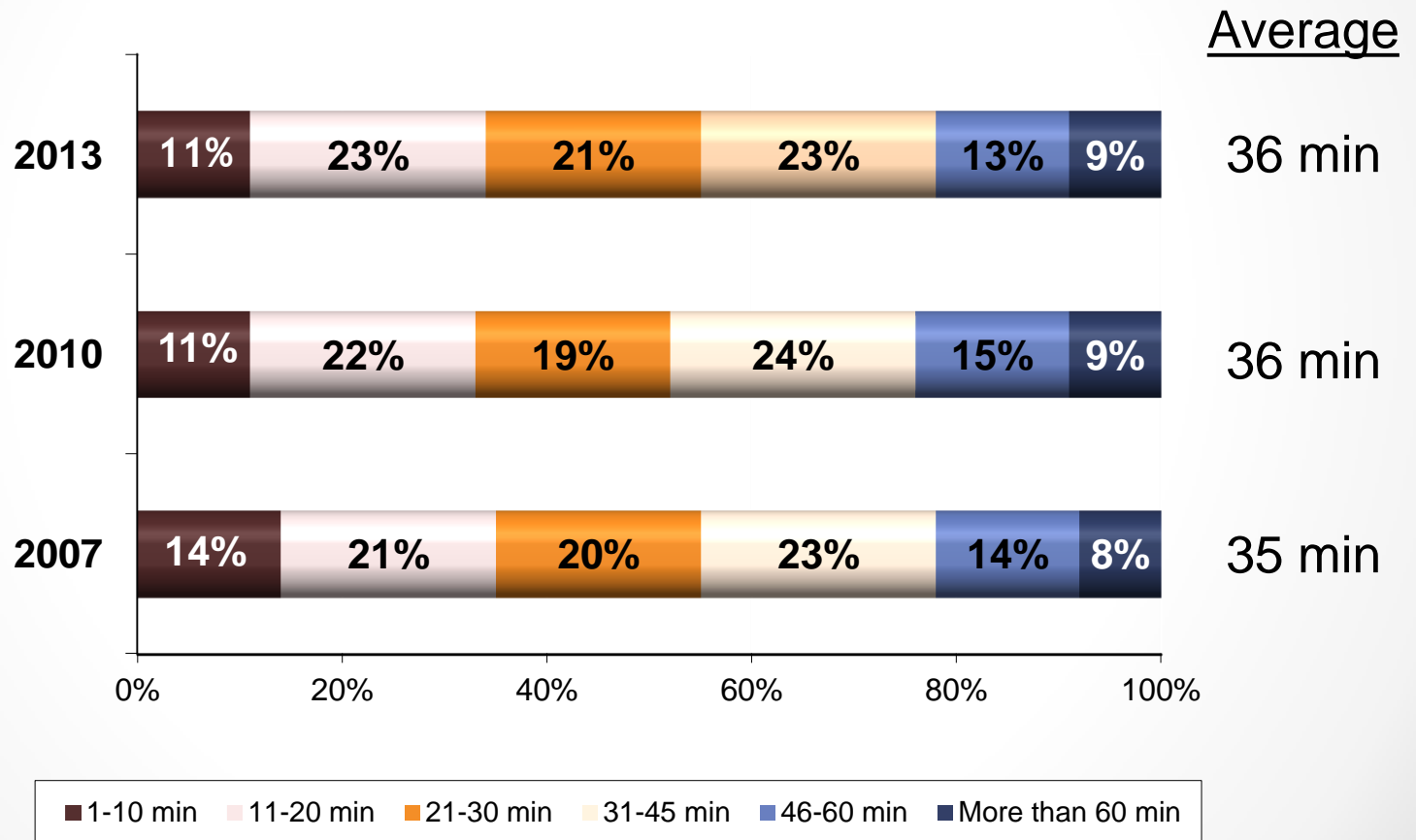
2013 SOC
 n = 5,122

2010 SOC
 n = 5,533

2007 SO 2007 C
 n = 5,465

The Average Commute Time is the Same in 2013 as in 2010 was about the same (36 min) as in 2007

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



2013 SOC
n = 5,605

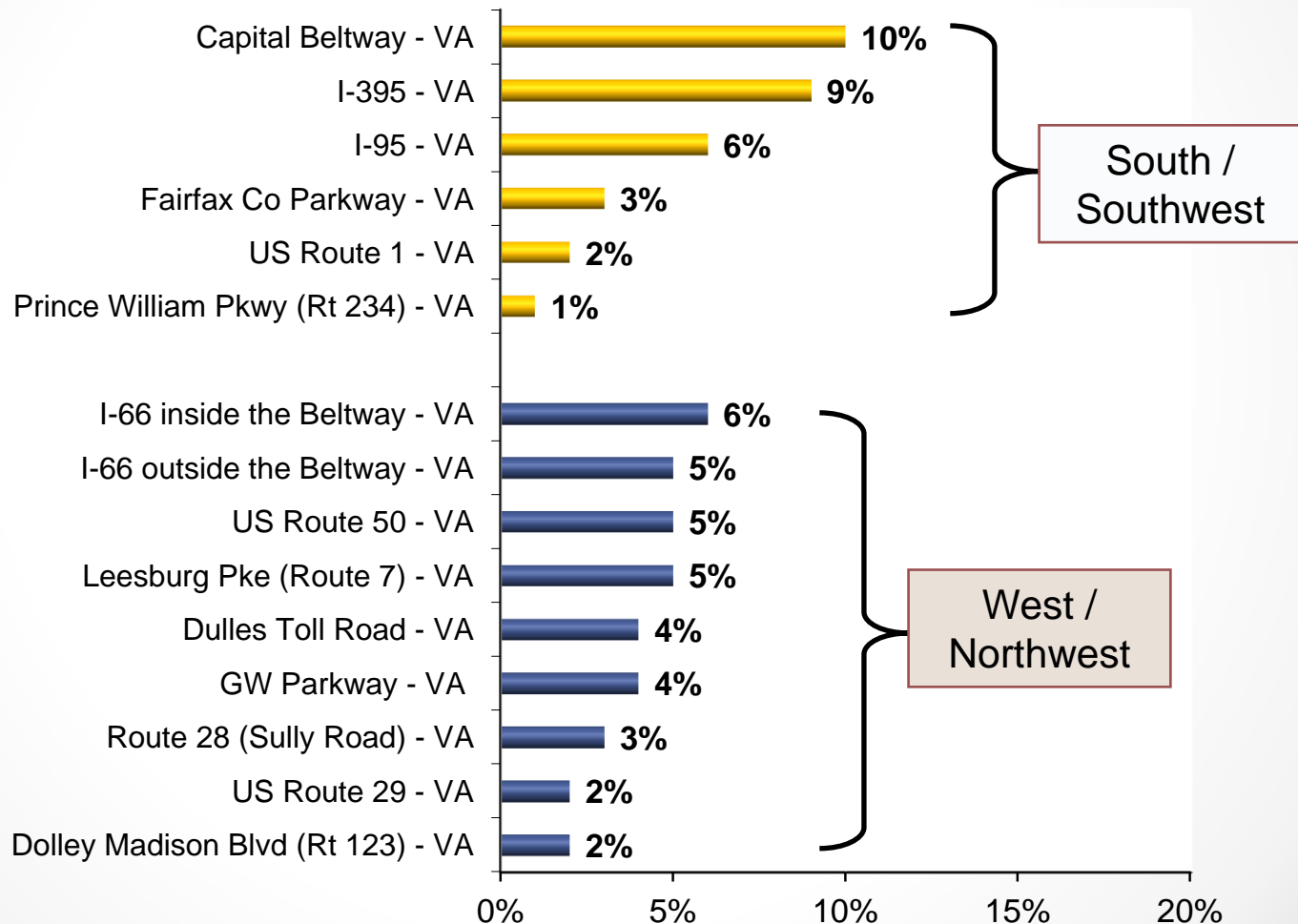
2010 SOC
n = 5,533

2007 SOC
n = 5,465

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

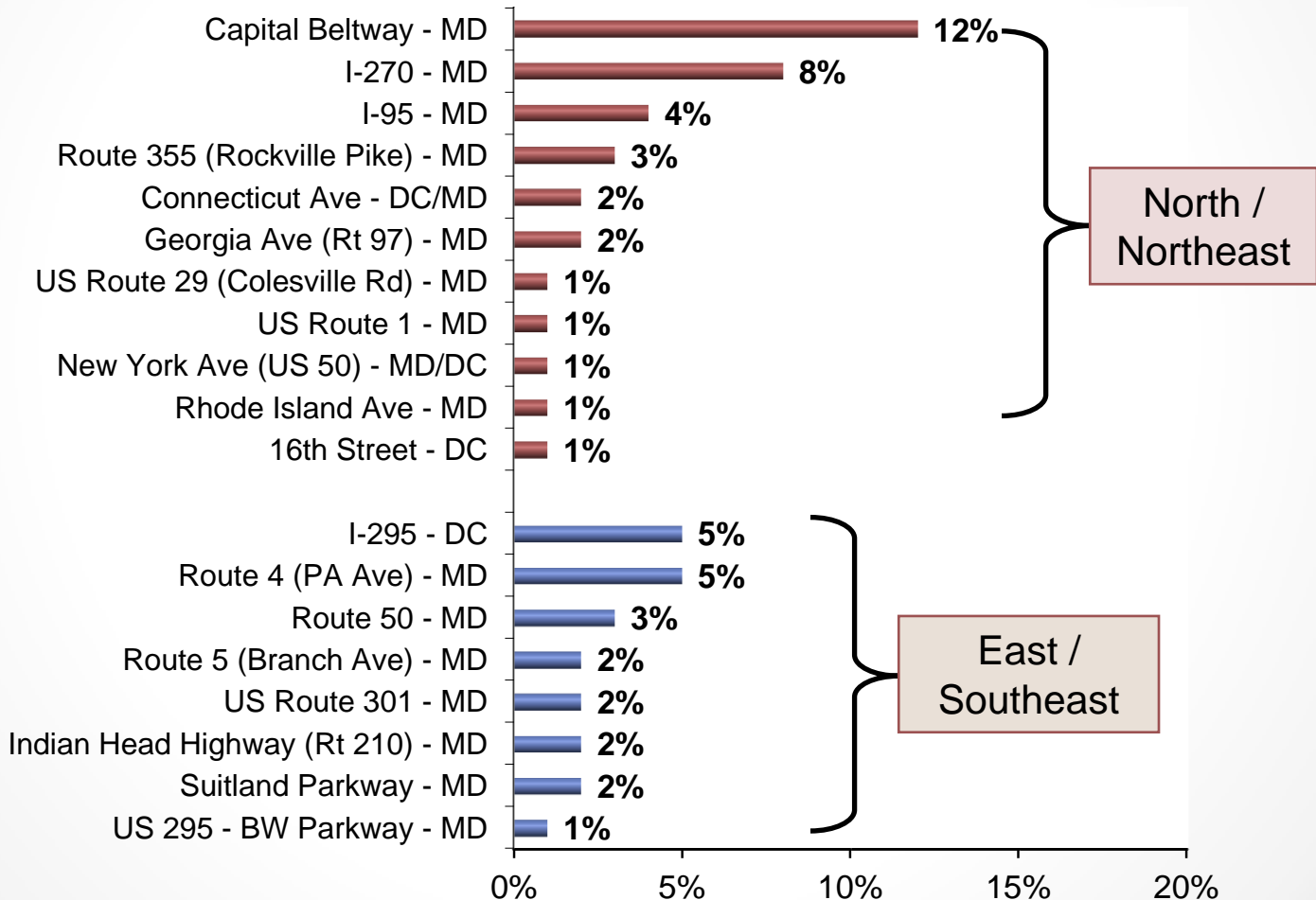
Major Virginia Roads Used

One in ten regional respondents does or would travel on the Virginia portion of the Beltway and 9% use I-395



Major DC / Maryland Roads Used

One in ten regional respondents does or would travel on the Maryland portion of the Beltway and 8% use I-270



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

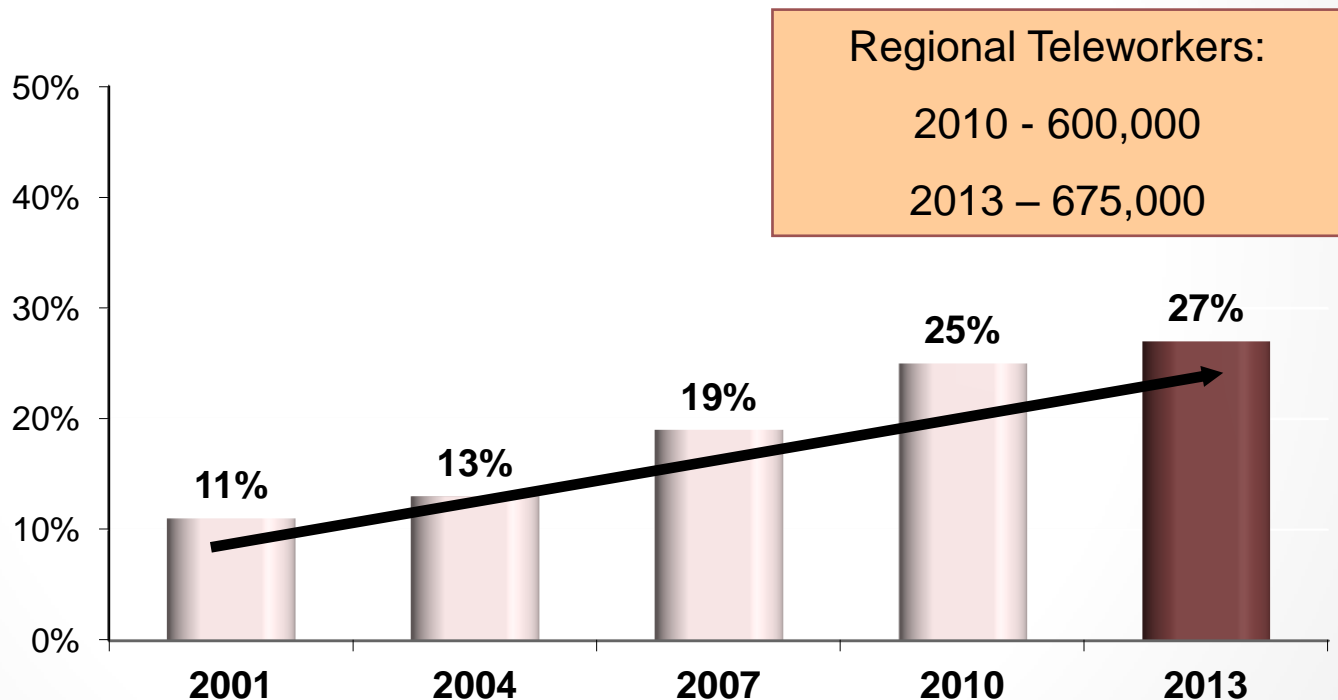
2004 SOC
n = 6,851

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

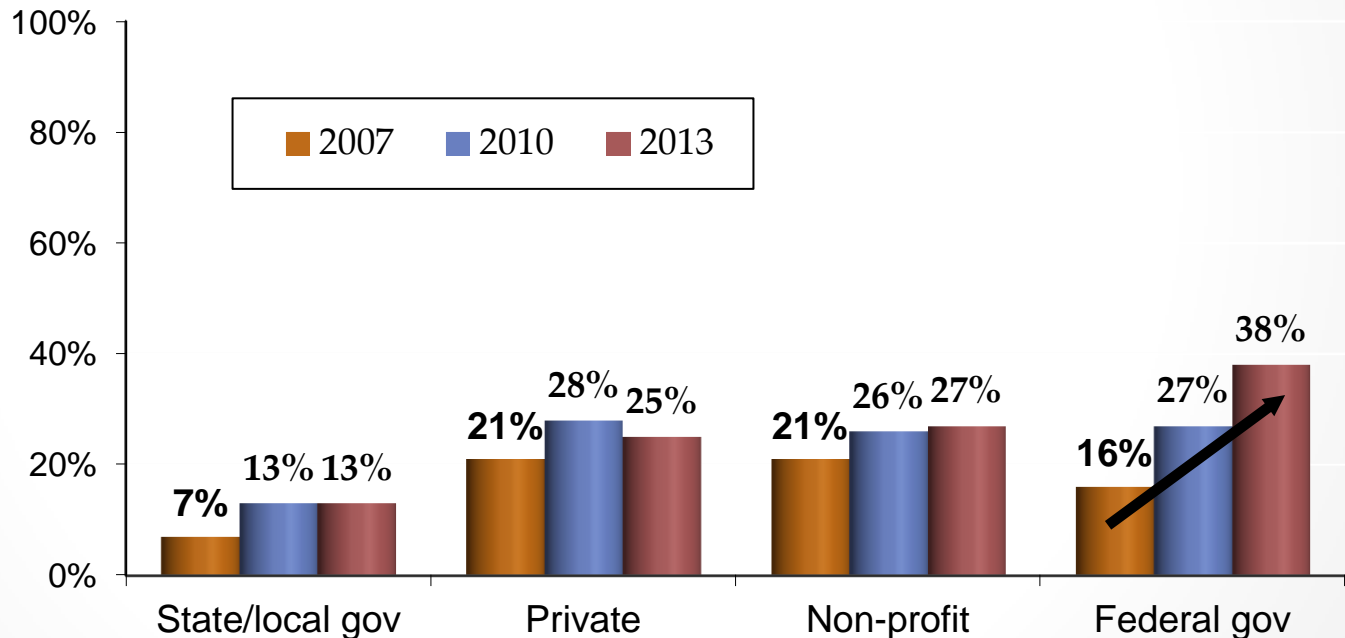
Federal agencies increased their telework from 16% of federal workers in 2007 to 38% in 2013

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? 14

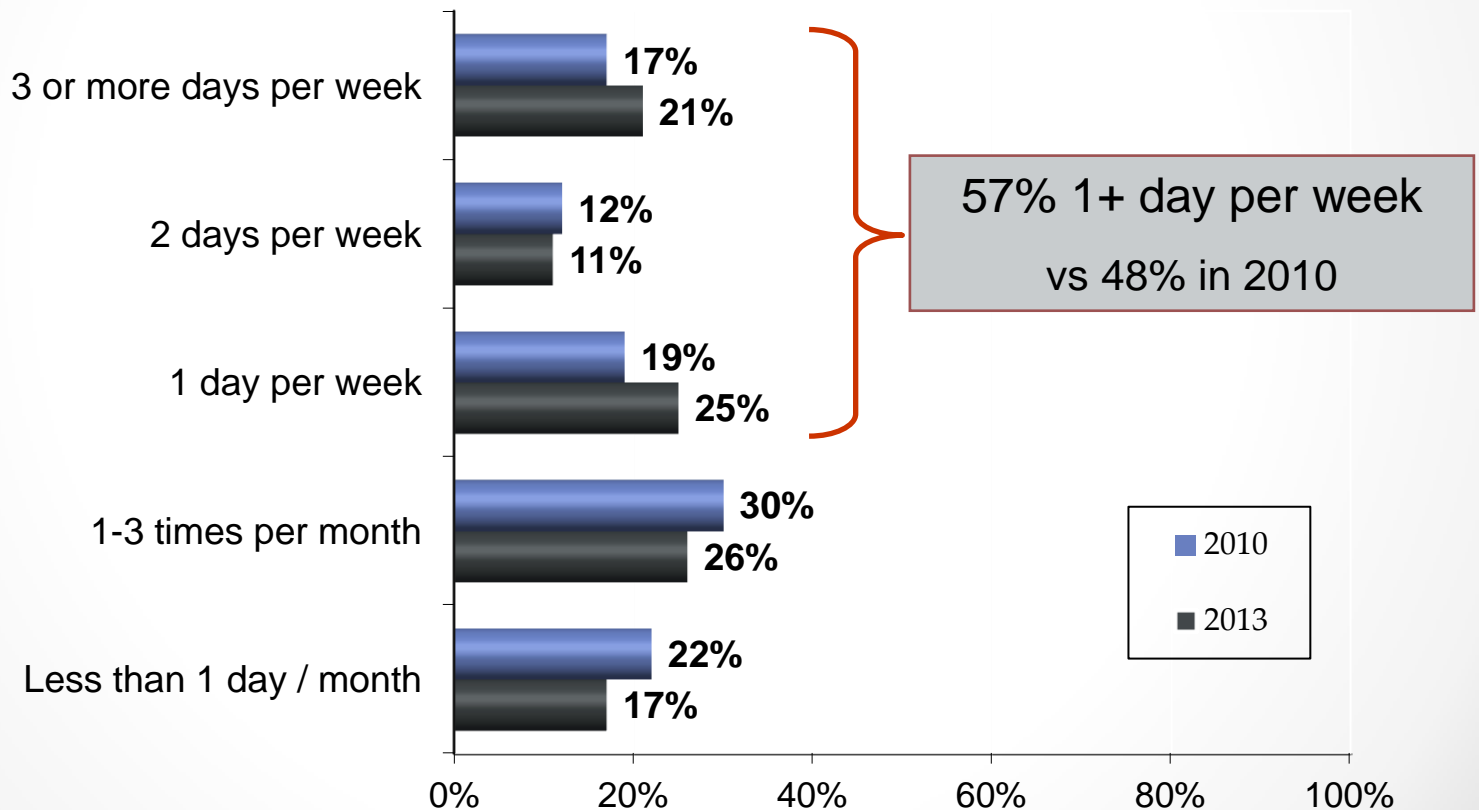
Work Schedule Arrangements in 2013 are Very Similar to 2010



	<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

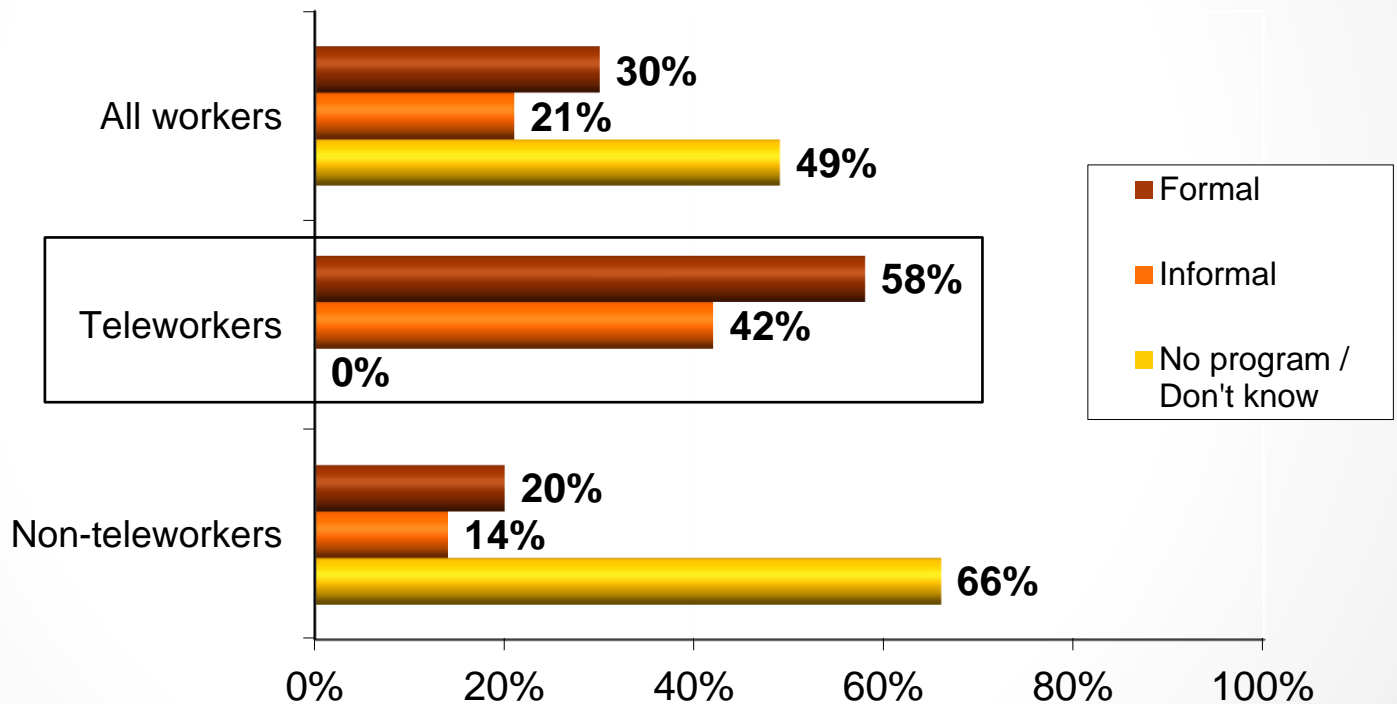
Three in Ten Workers Said Their Employer has a Formal Telework Program; About Half Said the Employer Does not Allow Telework

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

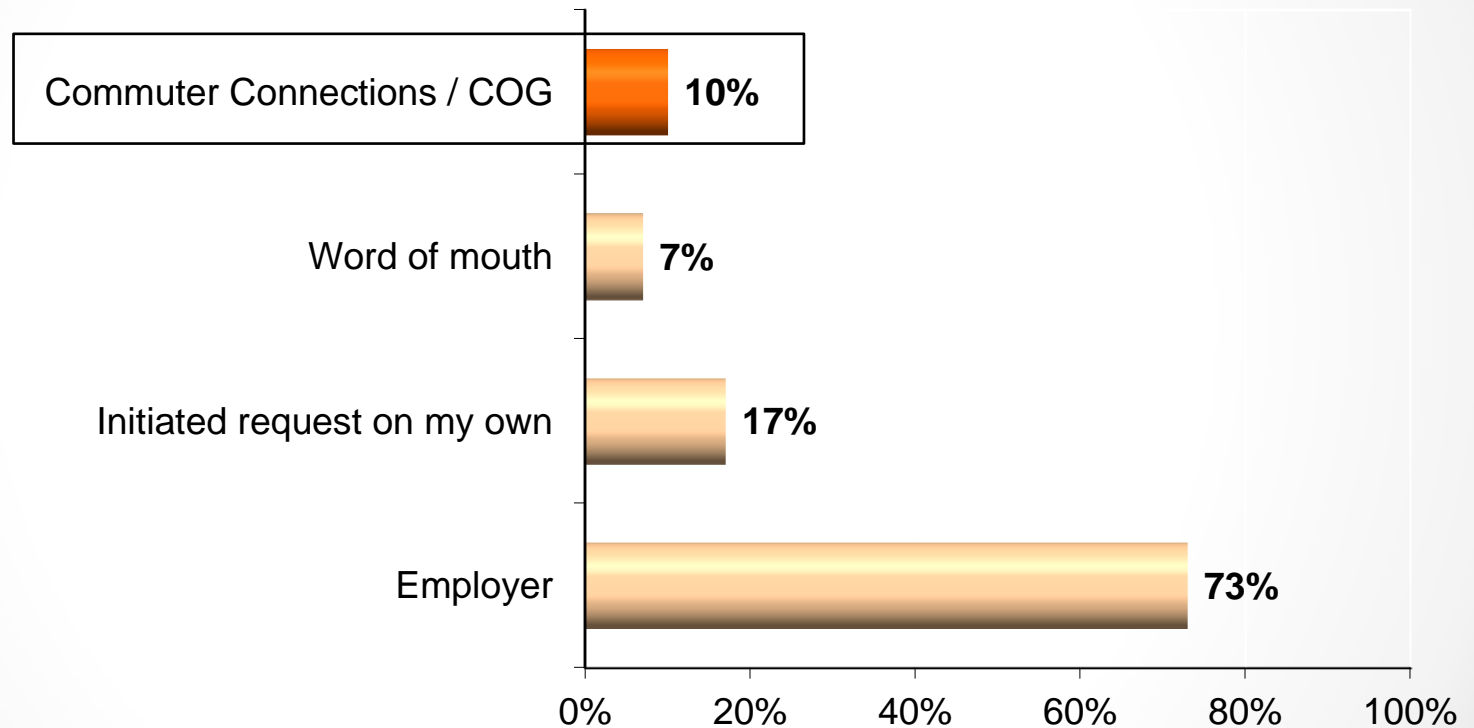


Q13a Does your employer have a formal telecommuting program at your workplace or do you telecommute under an informal arrangement between you and your supervisor?

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



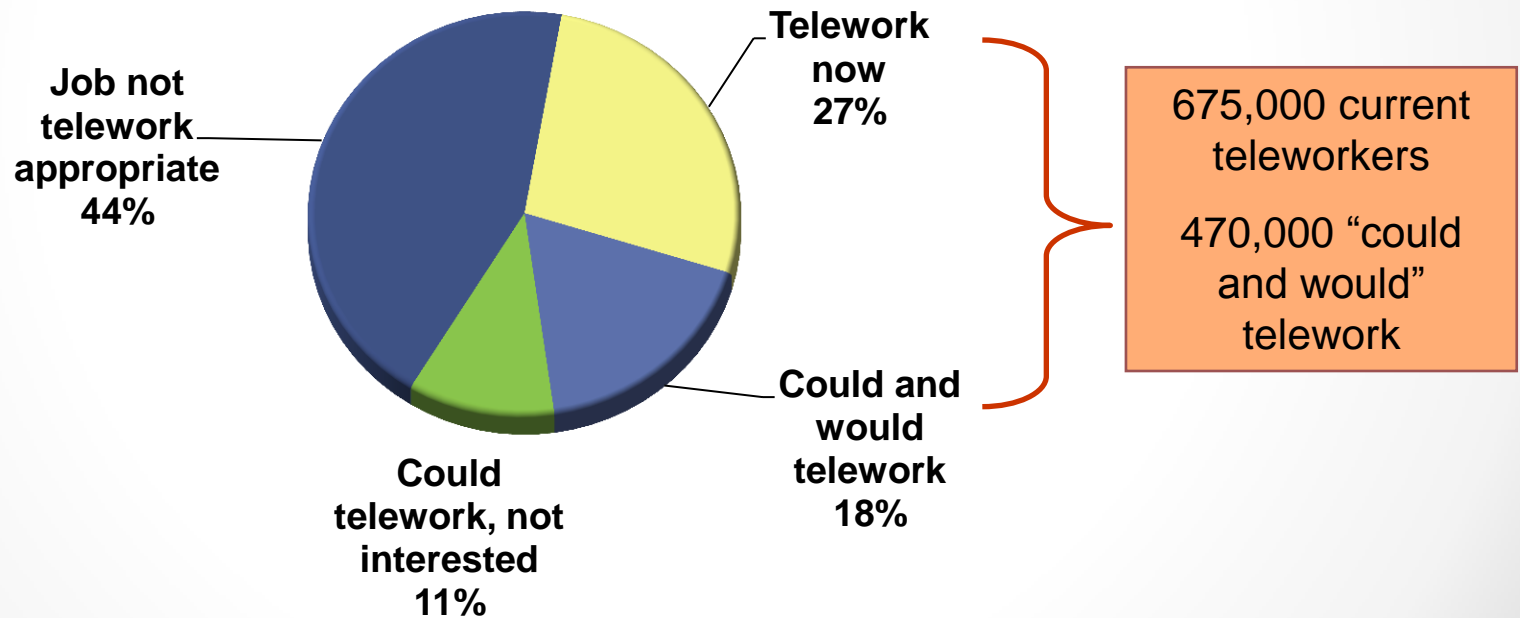
Teleworkers
n = 1,571

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

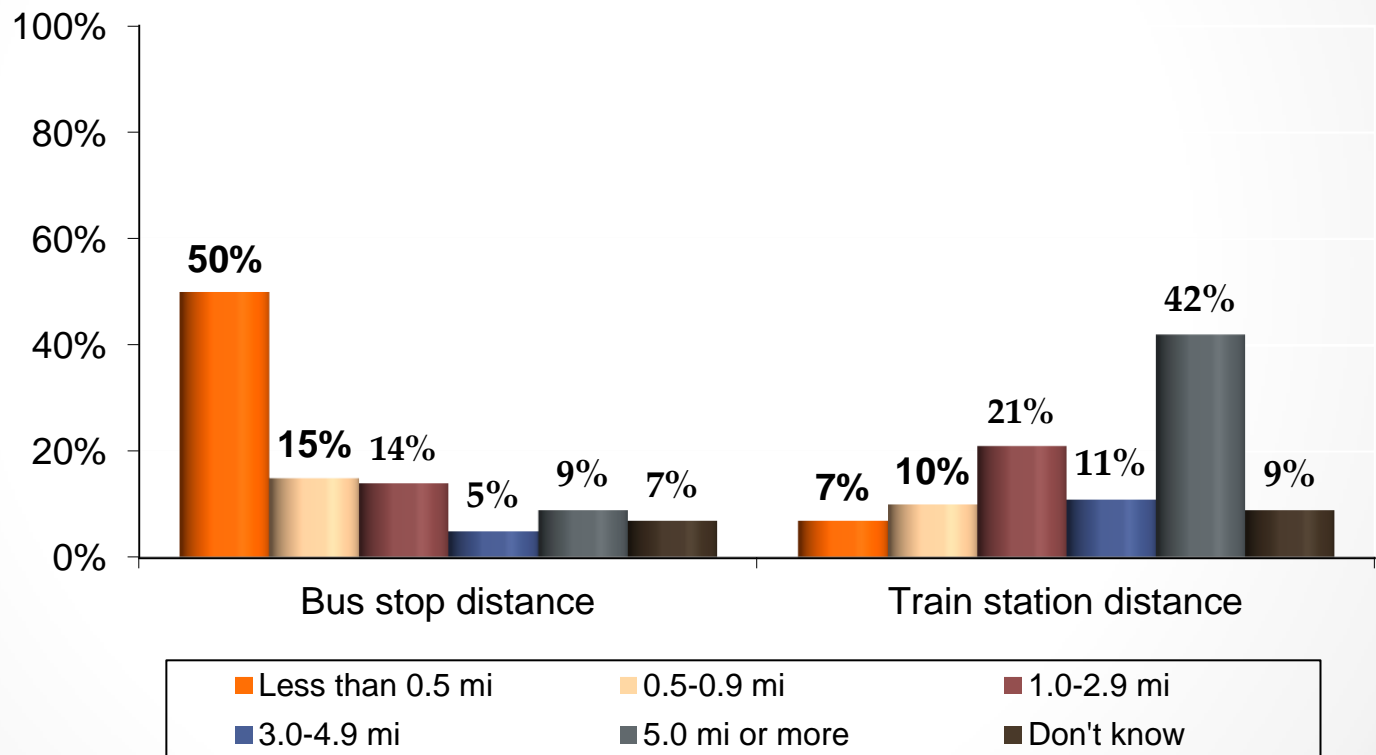
Excludes workers who are self-employed and work only at home

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



Bus distance
n = 5,718

Train distance
n = 5,718

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

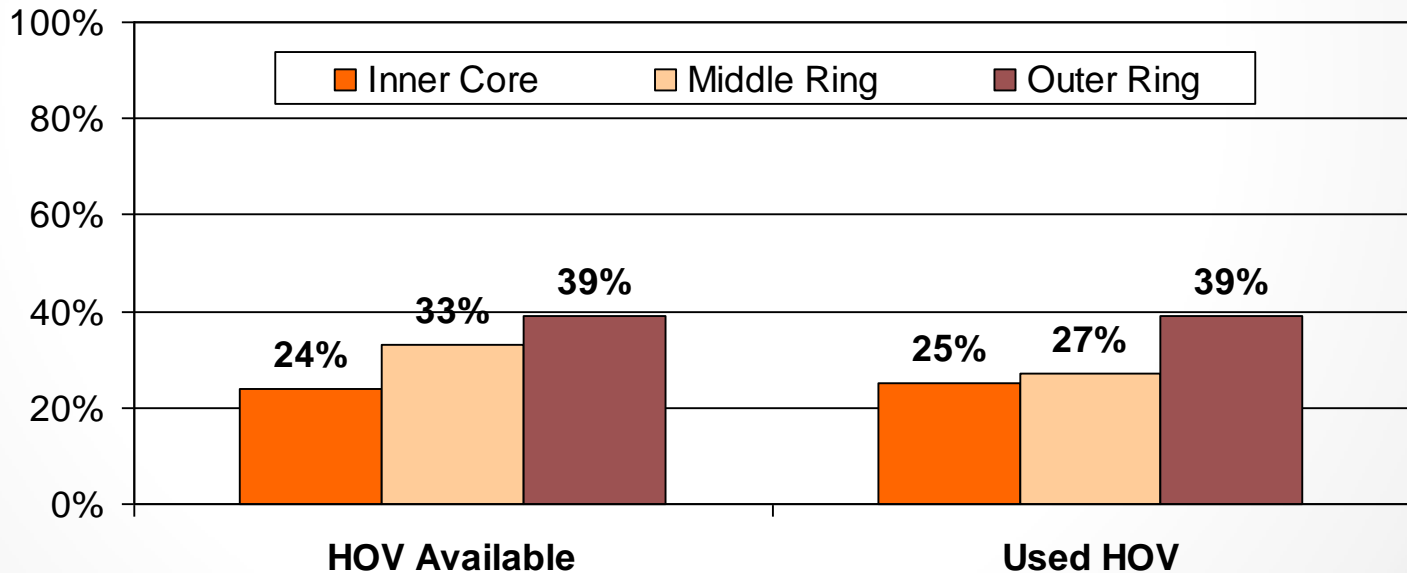
n = 483

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?

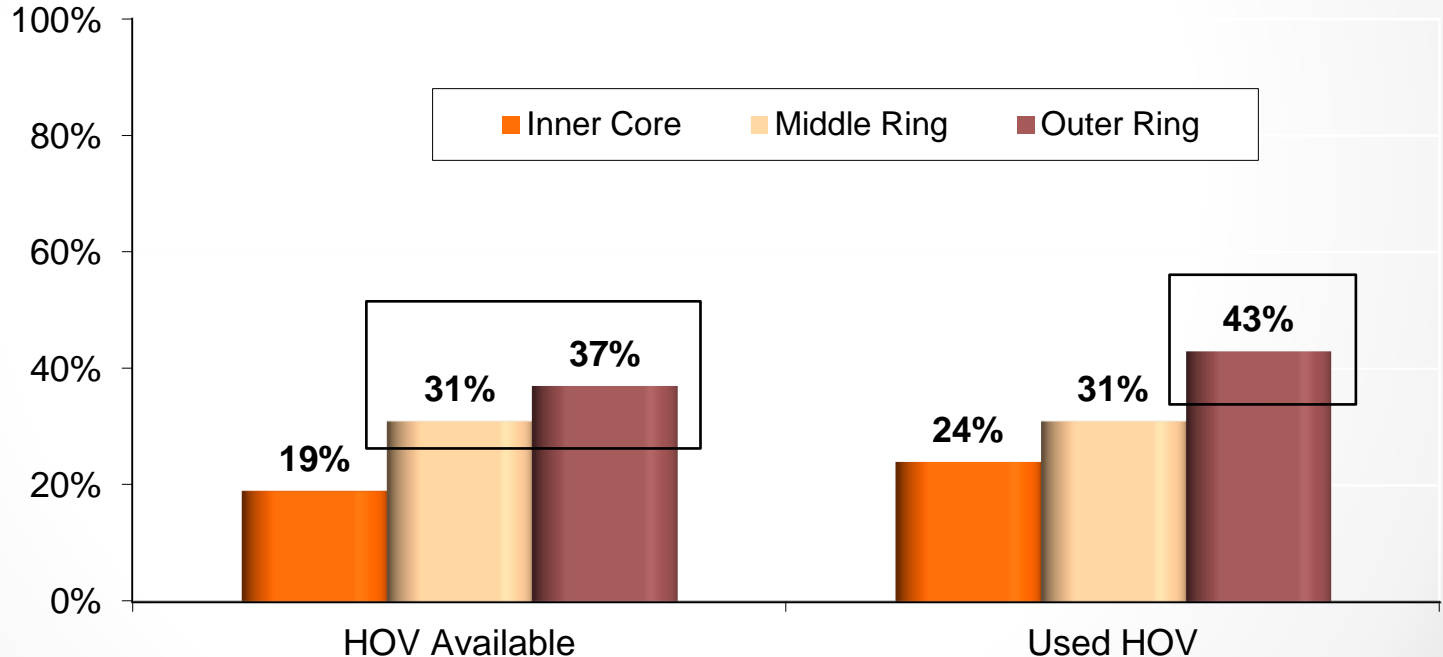
Q47 Do you ever use the HOV lane to get to or from work?

Middle Ring and Outer Ring Commuters are More Likely than are Core Area Commuters to have HOV / Express Lanes Available

“Outer Ring” commuters use HOV / Express lanes at a very high rate when they are available

HOV lane available
Core
n = 1,551
Middle Ring
n = 1,560
Outer Ring
n = 2,607

Use HOV lane
Core
n = 421
Middle Ring
n = 453
Outer Ring
n = 704



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?

Societal / Personal Benefits of Rideshare

Three survey questions:

- What impact or benefit does a community or region receive when people use these types of transportation?
- You said you [bicycle, walk, carpool, vanpool, ride public transportation] to work some days. What benefits have you personally received from traveling to work this way?
- On days that you [carpool, vanpool, ride public transportation] to work, how often do you do you read or write work-related material or check work messages on the way to work?



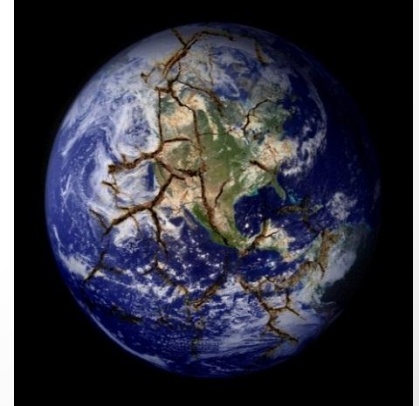
Personal health



Economics



Congestion



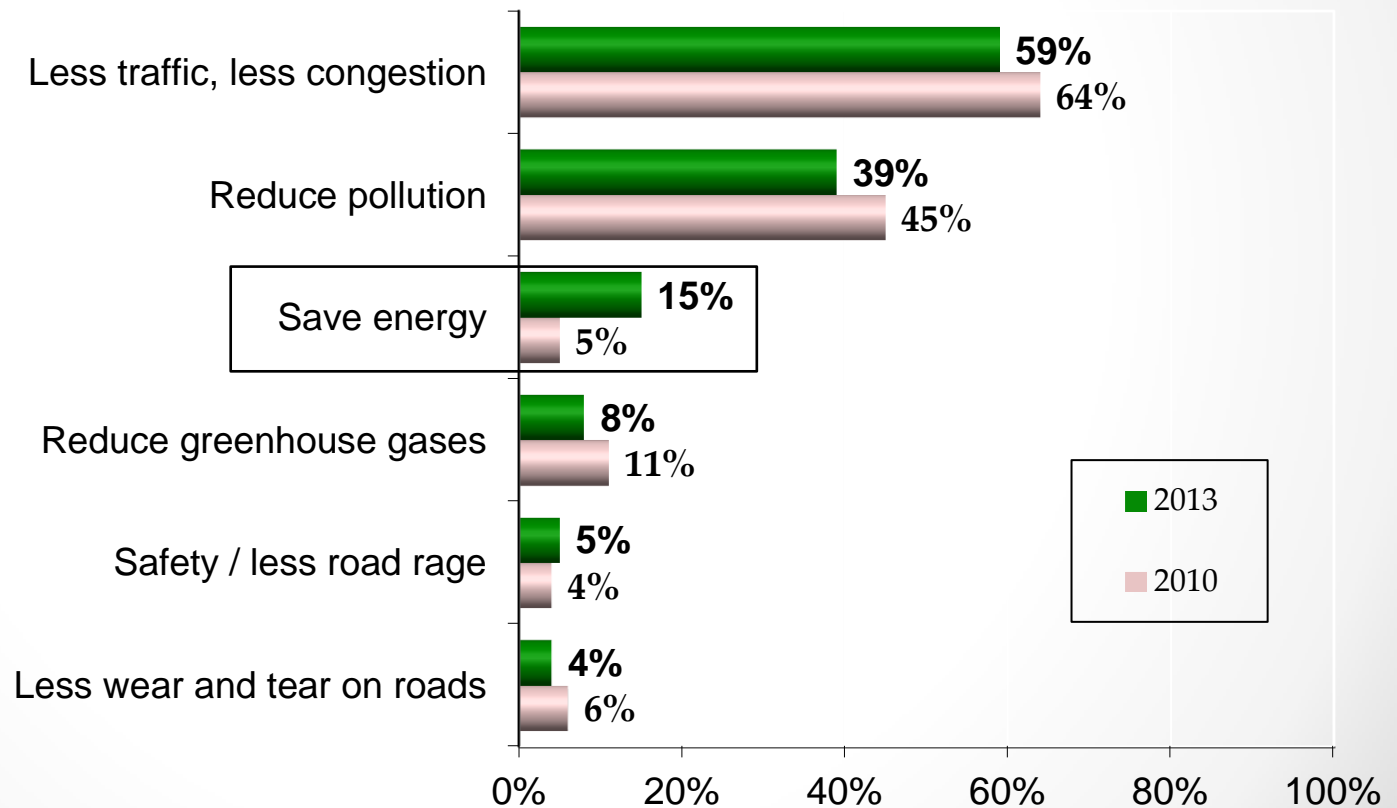
Sustainability ● 23

81% of Respondents Cite Societal Benefits from Ridesharing

59% of respondents said use of alternative modes could reduce traffic or congestion and 47% said it could reduce pollution or reduce greenhouse gases

Other 2013 Benefits

- Companionship, socialization, sense of community – 3%
- Reduce accidents, improve traffic safety – 2%
- Good for economy, creates jobs – 2%
- Reduce government costs – 1%
- No need to build more parking – 1%



2013
n = 5,718

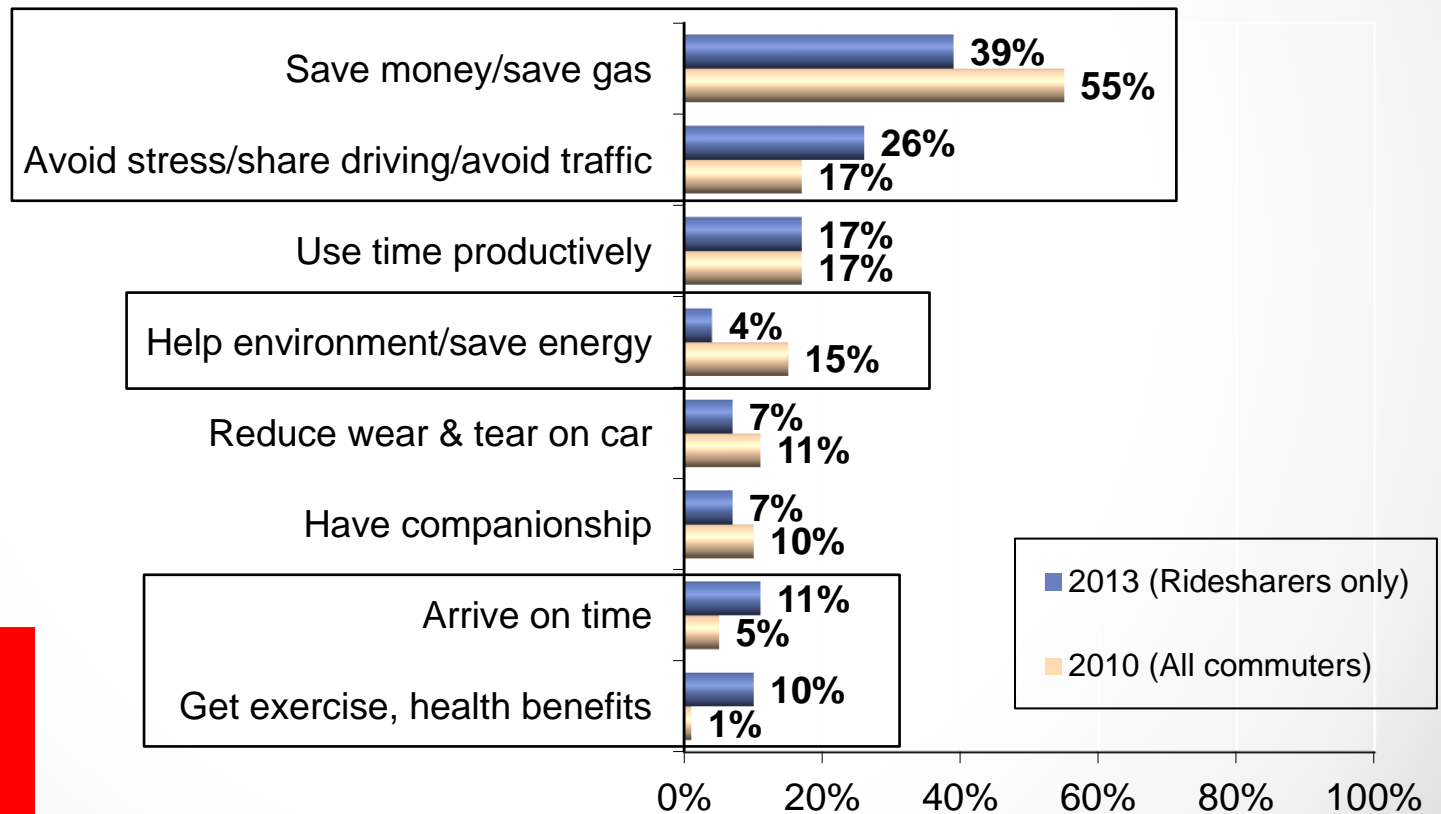
2010
n = 6,050

90% of Ridesharers Cite Personal Benefits of Ridesharing – same Share as in 2010

But in 2013, more respondents mentioned avoid stress, arrive on time, and exercise as benefits, while fewer respondents mentioned cost saving or environmental benefits

Other 2013 Benefits

- No need for car – 7%
- Save time – 5%
- Use HOV - 2%
- Reduce greenhouse gases – 2%
- Less traffic / avoid traffic – 2%
- Save gas/energy – 1%



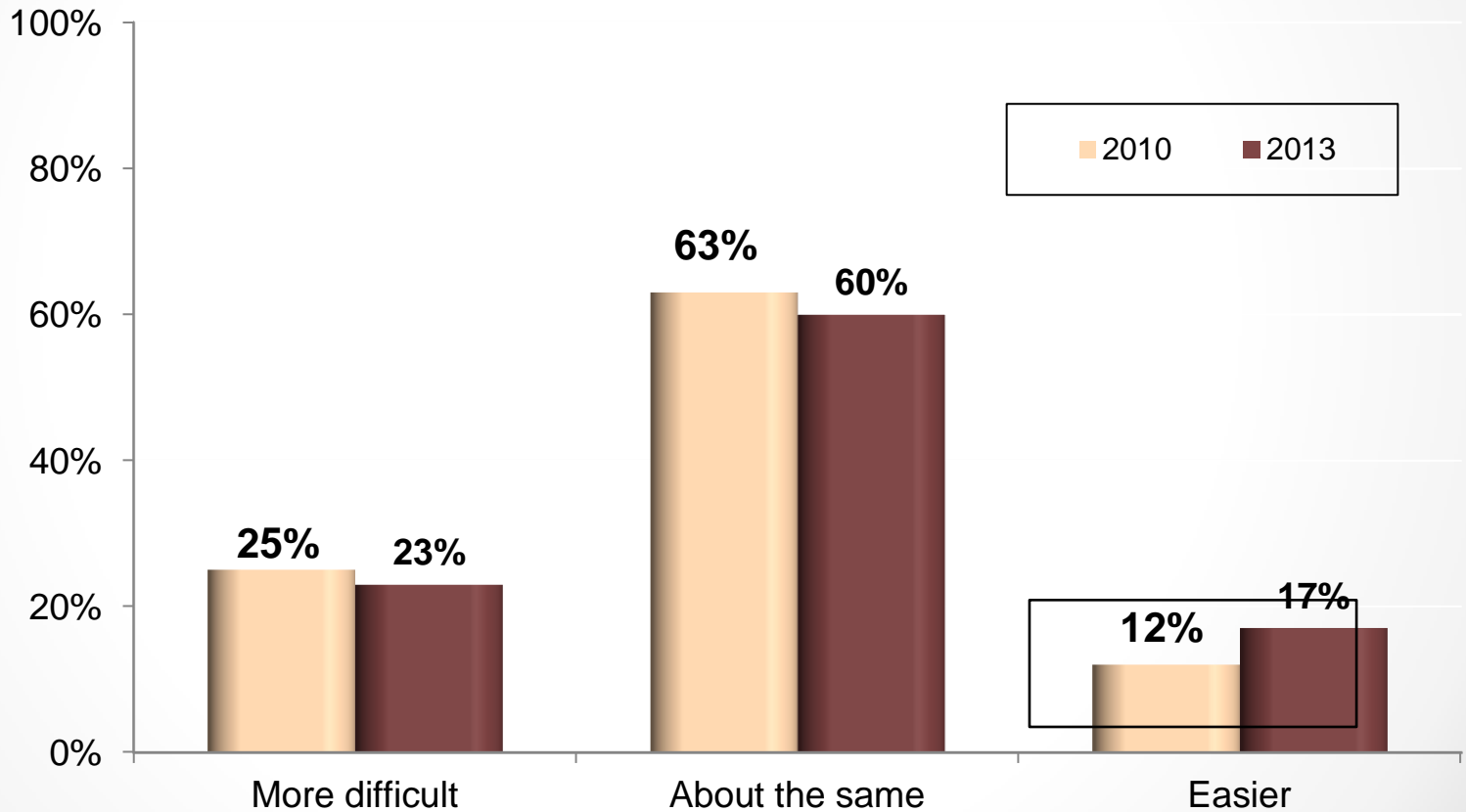
2013
n = 1,575

2010
n = 6,050

In 2010, all respondents were asked about personal benefits

Q56b. You said you (bicycle, walk, carpool, vanpool, ride public transportation) to work some days. What benefits have you personally received from traveling to work this way?

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

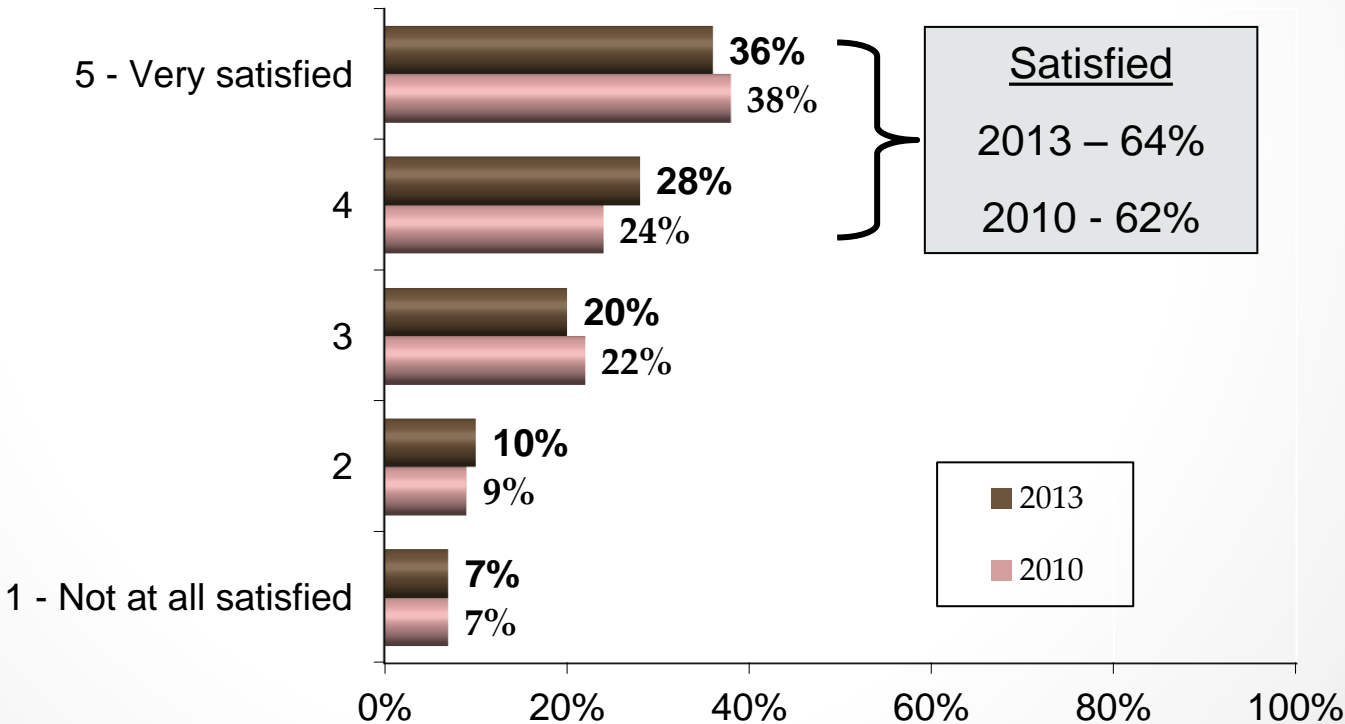


2013
n = 5,717

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



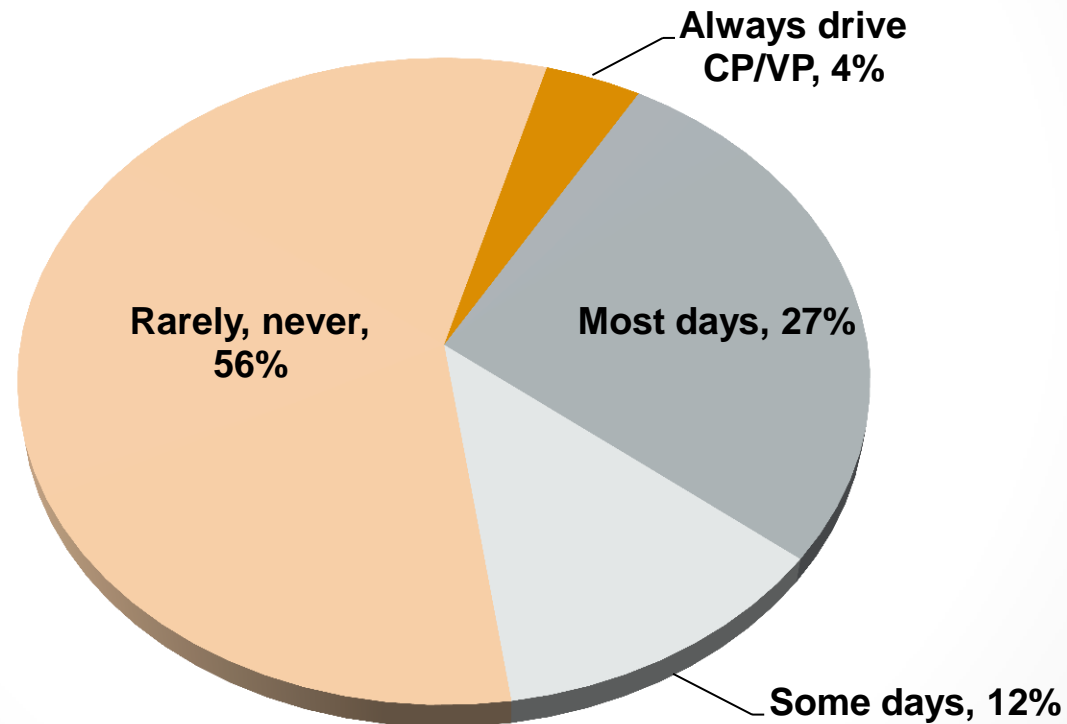
2013
n = 5,692

2010
n = 6,033

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

Four in Ten Commuters who Use Alternative Modes Perform Work-related Tasks During their Commute at Least Some Days

27% perform work-related tasks “most days”

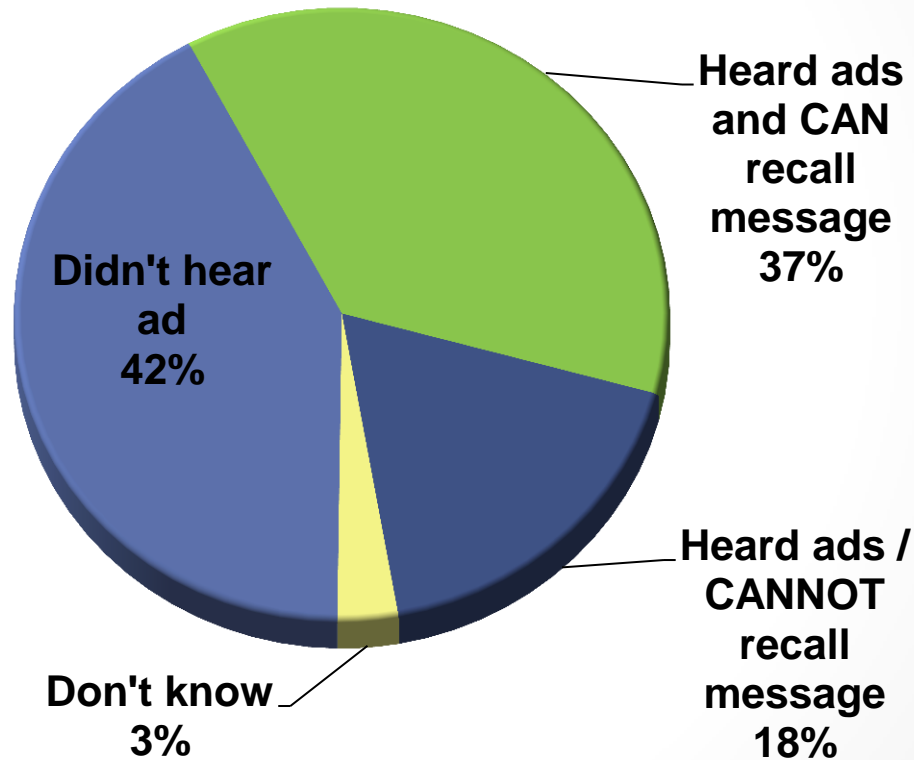


56d. On days that you (carpool, vanpool, ride public transportation) to work, how often do you do you read or write work-related material or check work messages on the way to work?

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

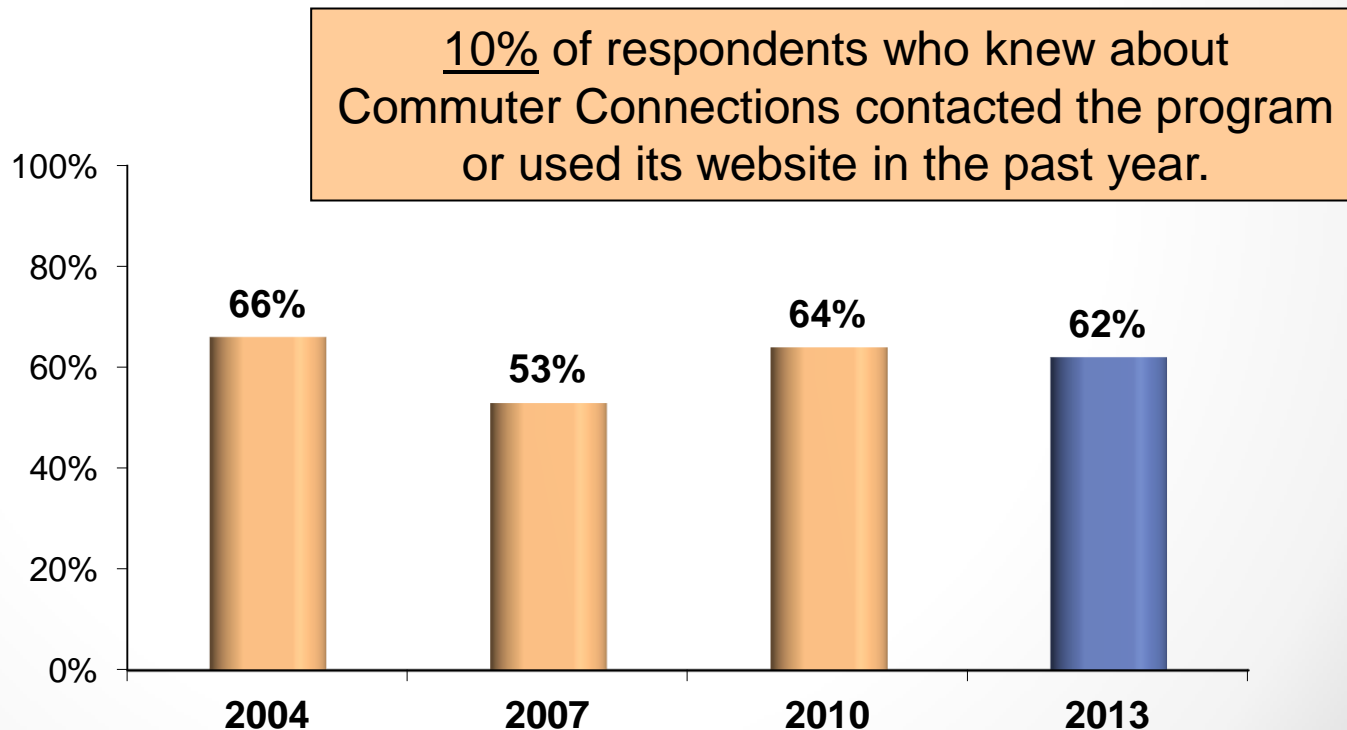
USE of Commuter Connections increased from 5% to 6% of the employed residents of the region

2004 SOC
n = 7,200

2007 SOC
n = 6,600

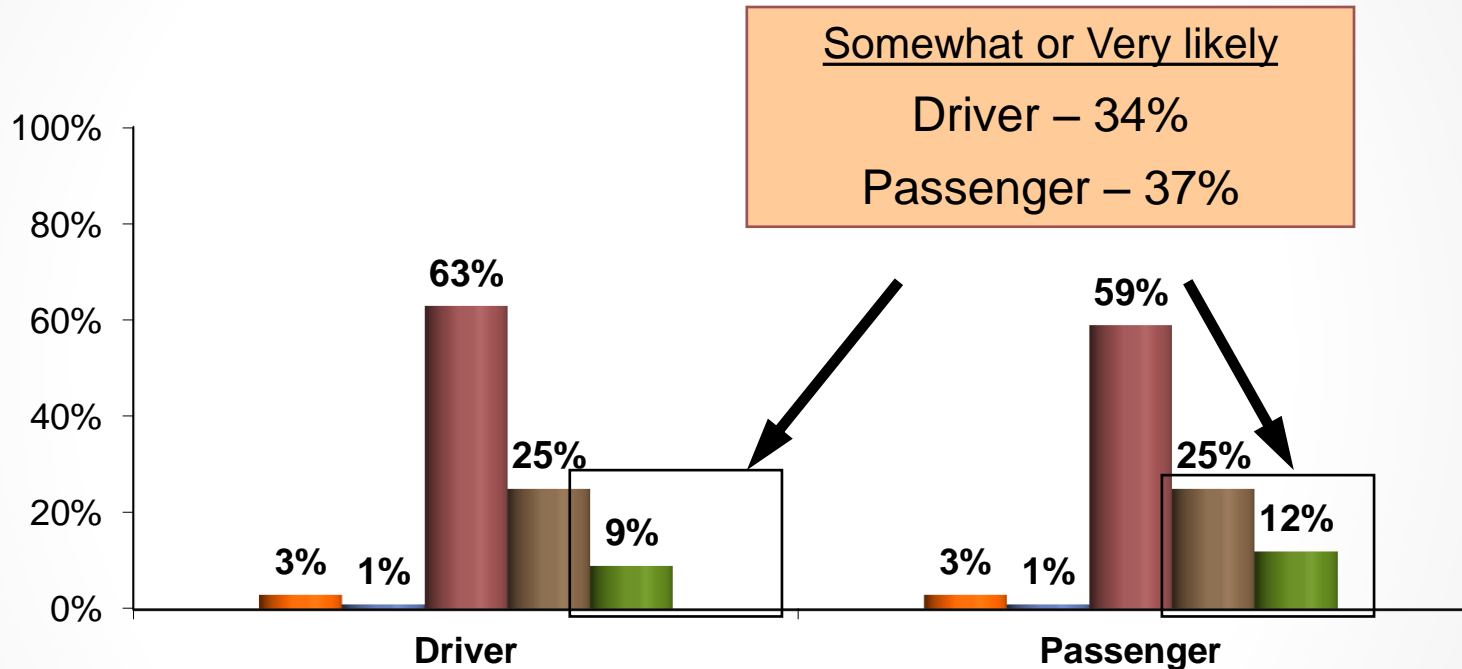
2010 SOC
n = 6,629

2013 SOC
n = 6,335



More than a Third of Commuters Expressed Interest in “Instant Carpooling”

Commuters are slightly more interested in using the service as a passenger than driver, even with a \$0.20 per mile charge



Drive alone commuters
 n = 5,368

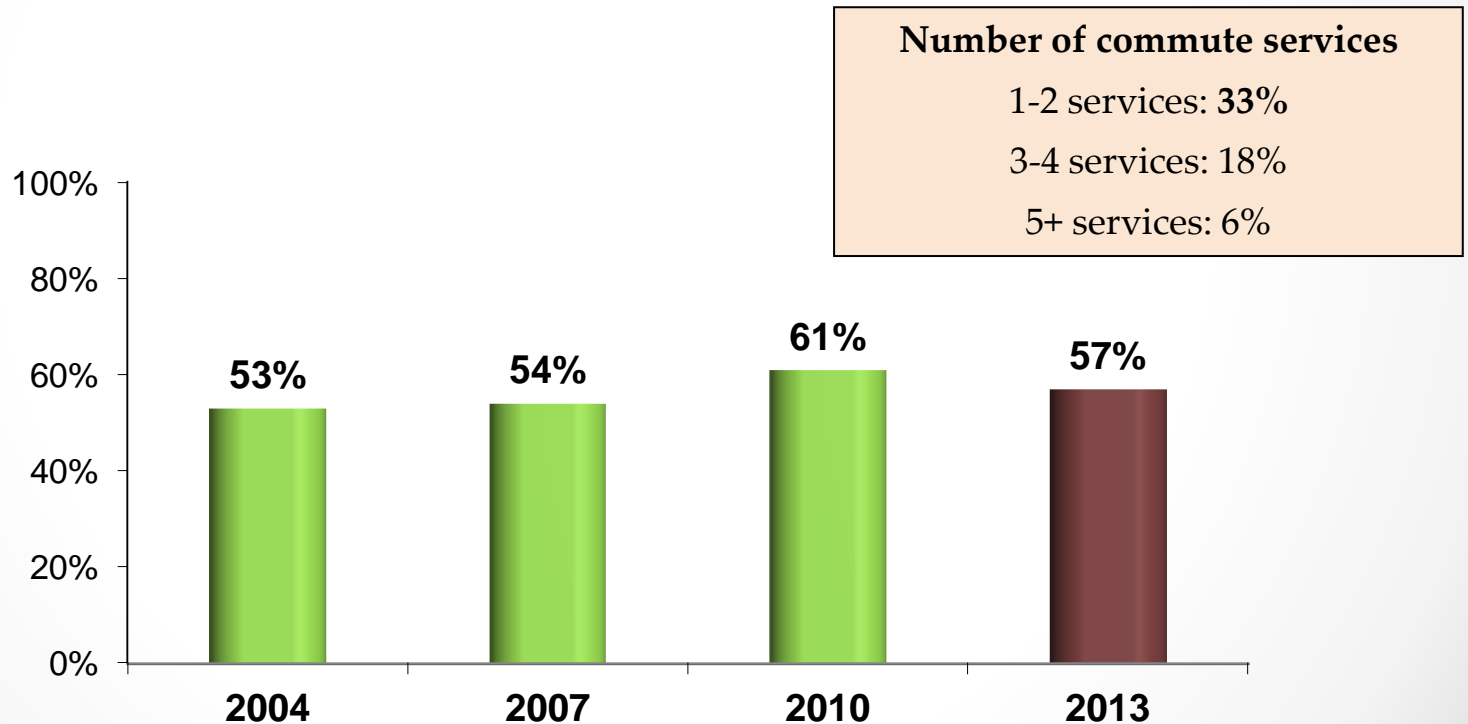
■ Don't know
 ■ Very unlikely
 ■ Somewhat unlikely
 ■ Somewhat likely
 ■ Very likely

88h Now, I'd like your opinion on a new service that might be offered in the Washington area – that is, an instant carpool service that would make it easy for you to arrange to share a ride for a single trip on short notice. Registered members who want to share a ride would post a request to a Smart phone-accessible application. Other members would be notified of requests through email or texts and could respond for rides they are willing to share. If a service like this was available in the region and drivers were paid \$0.20 per mile when they provide a ride, how likely would you be to use it when you are the driver?

Q88k How likely would you be to use it when you are a rider or passenger, if you had to pay \$0.20 per mile?

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

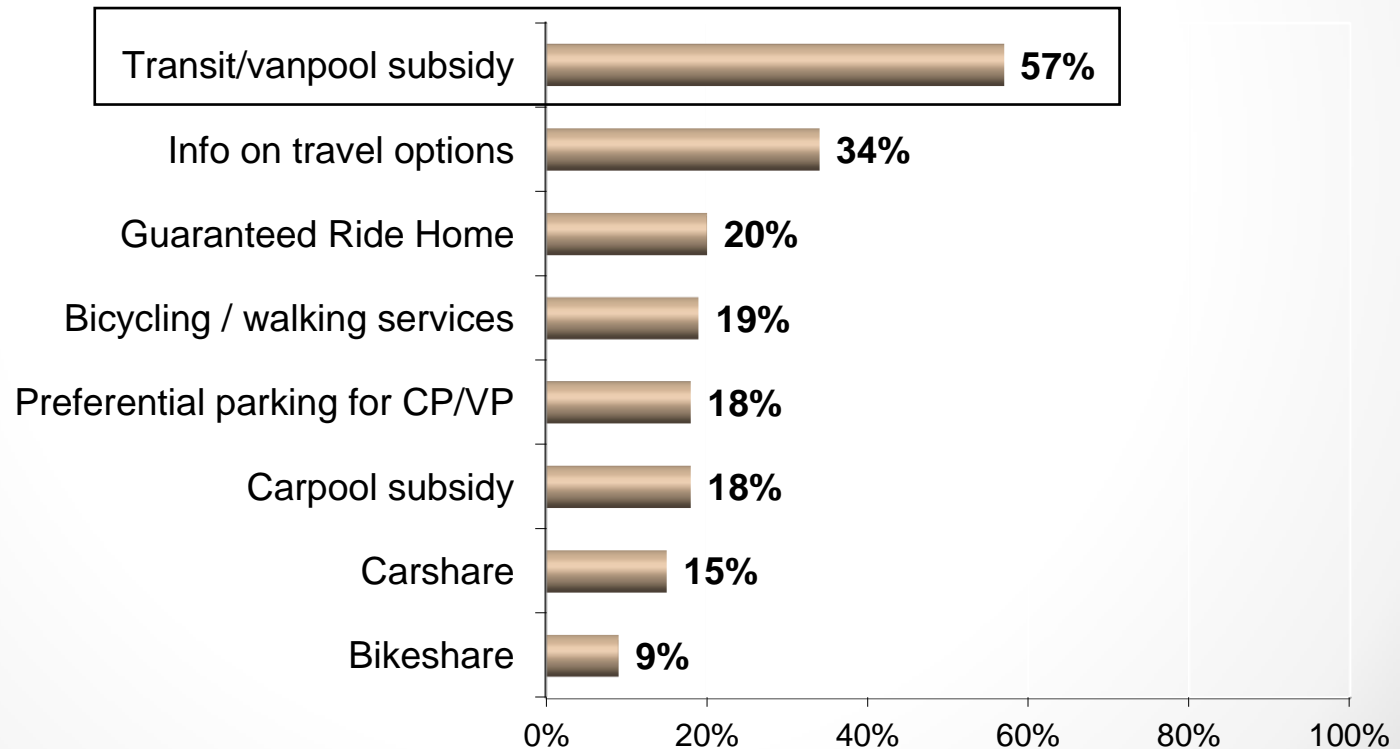
2010 SOC
n = 5,899

2007 SOC
n = 6,071

2004 SOC
n =

The Most Widely USED Employer Service Also is a Transit / Vanpool Subsidy – used by 57% of respondents with access to the service

34% of respondents with access had used travel option information; other services used by two in ten with access



2013 SOC
n = 5,524

Next Steps

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

Questions?



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