

Commuter Connections TERM Evaluation Project 2016 State of the Commute Survey

Highlight Results

July 19, 2016

LDA Consulting

with

ESTC, CIC Research, CUTR





Methodology

Survey Methodology

- Sixth triennial survey (2001, 2004, 2007, 2010, 2013, 2016)
- Combination **telephone/Internet** survey of 5,903 randomly-selected employed residents of COG region (95% \pm 1.3%)
- Jurisdiction counts of 474 – 599 (95% \pm 4.0%-4.5%)
 - 5,029 phone interviews, 874 Internet
 - Included 751 cell phone interviews to ensure “cell phone only” households were surveyed
 - County level results were expanded to the regional population of workers
 - Data also were weighted to adjust sample for cell phone / landline availability, race/ethnicity, and age (NEW)



SOC Survey Topics



Continued tracking questions

- Current/past commute patterns
- Telework
- Awareness/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 2016

- Extra commute time to account for travel delays
- “Episodic” telework
- Quality of life rating
- Interest in incentive to shift work hours outside peak period



Commuter Patterns

Key Findings

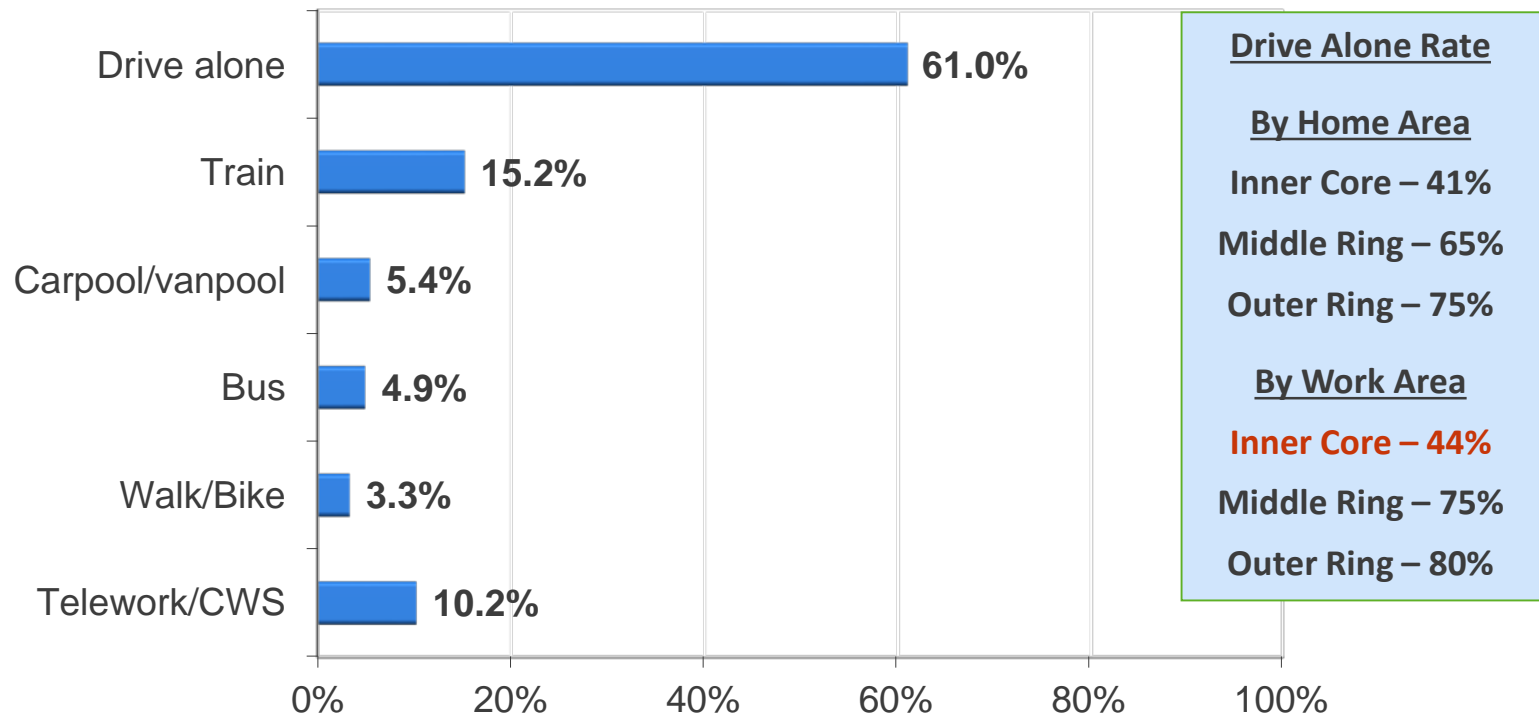
The share of commute trips made by driving alone dropped 10 points from 2004 to 2016; use of train and telework increased

Commuter distance and time were longer in 2016 than 2013; eight in ten commuters added extra time to accommodate delay

Three in ten commuters had access to HOV lanes and 9% used them; 15% had access to Express lanes and 8% used them; lane users saved 20 minutes per one-way commute

61% of Commuters' Weekly Commute Trips Were Made by Driving Alone; 20% 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



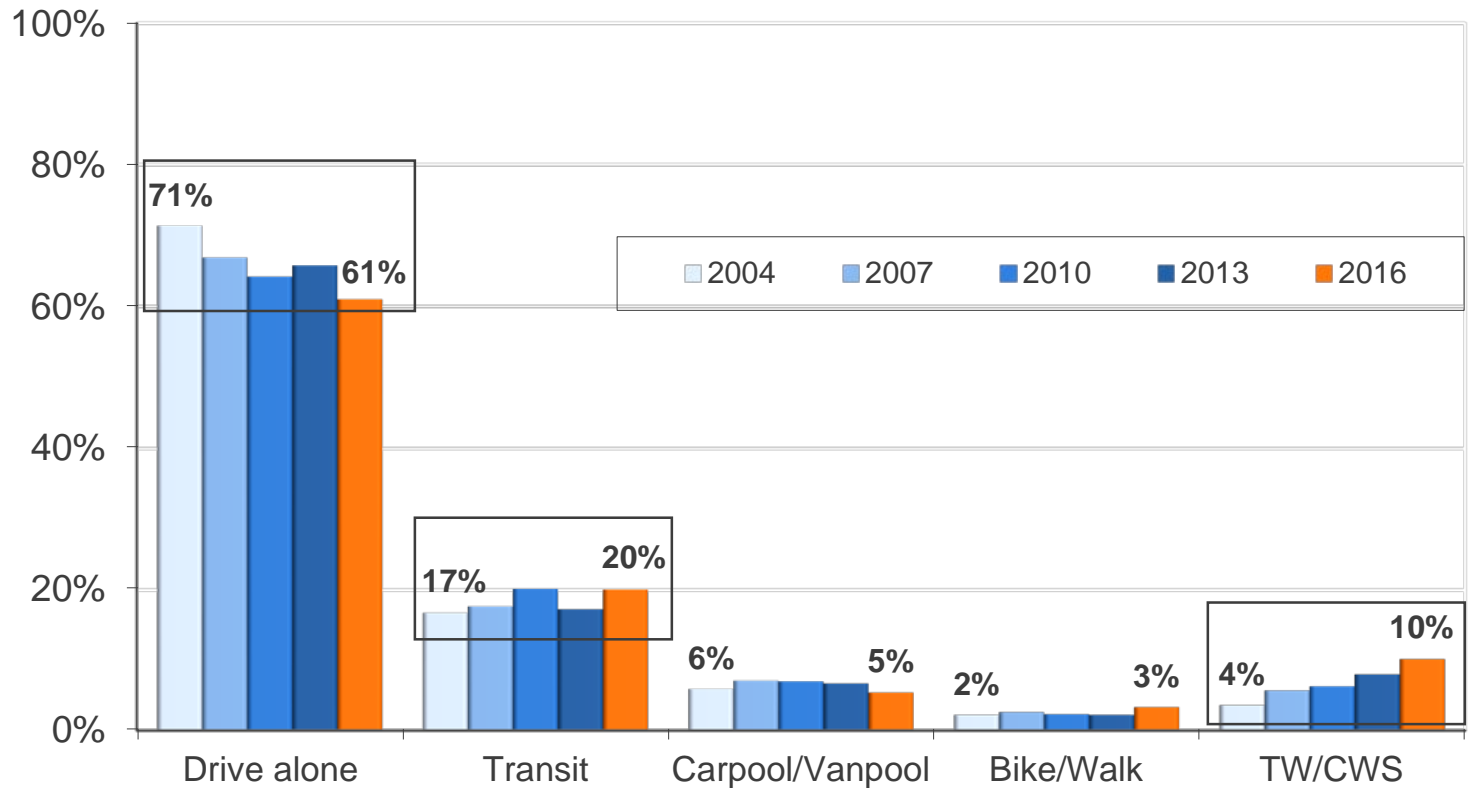
2016 SOC
n = 5,503

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

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

Between 2004 and 2016, Drive Alone Percentage Fell 10 Points, from 71% to 61%

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

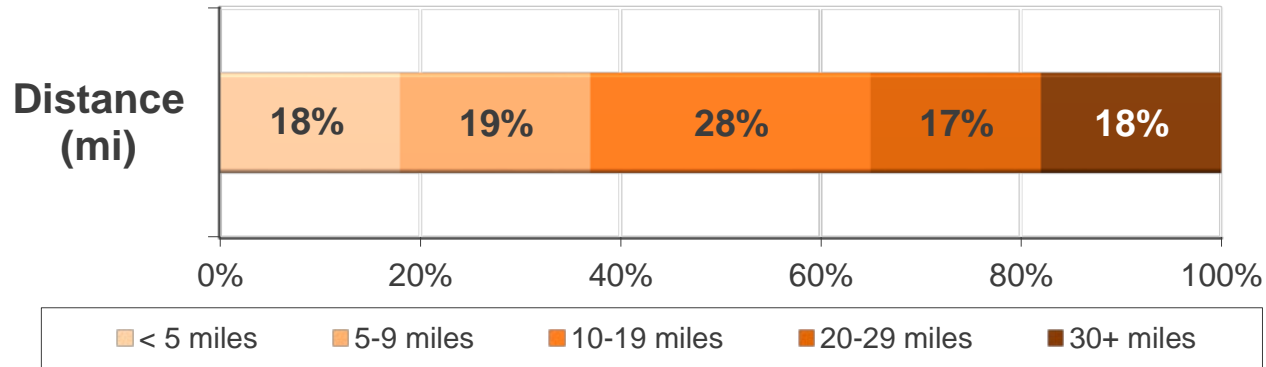
Q15. Now thinking about LAST week, how did you get to work each day. ..

In 2016, Commuters Traveled 17.3 Miles and 39 Minutes One-way to Work

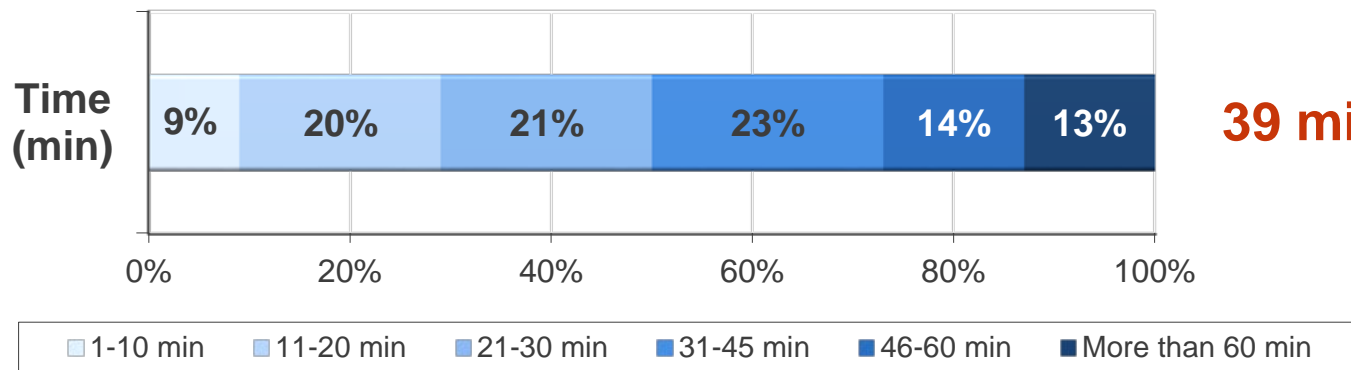
Both distance and time were longer than in 2013 or 2010

Average

17.3 mi



39 min



Distance

2010 - 16.0 mi

2013 - 16.3 mi

Time

2010 - 36 min

2013 - 36 min

2016 SOC

Distance
n = 4,766

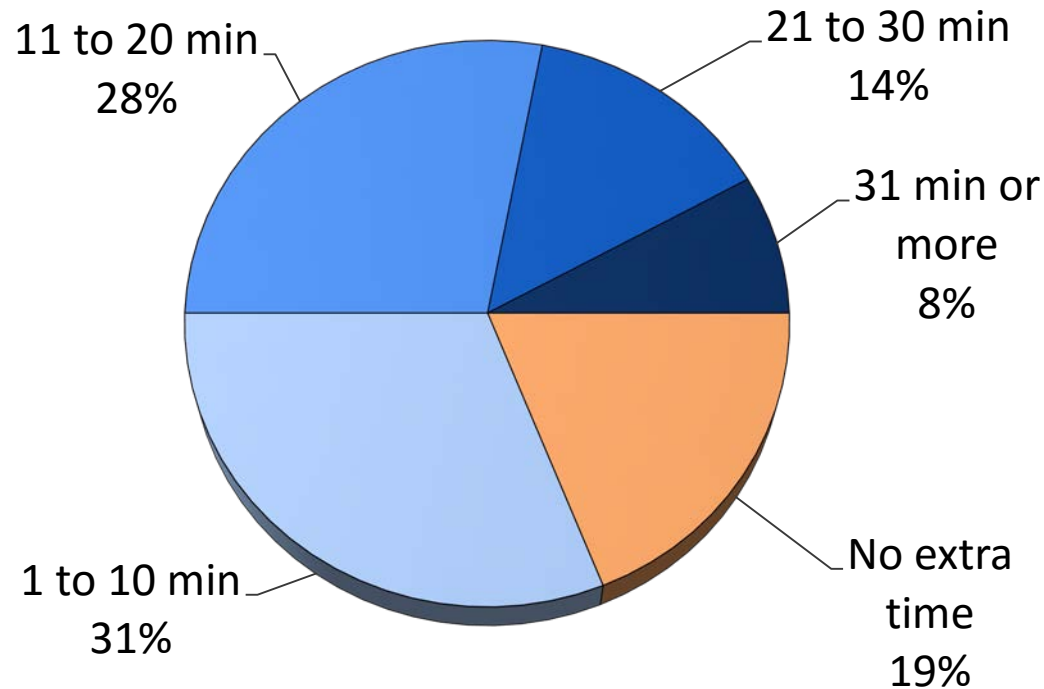
Time
n = 5,036

Q15b How long is your typical daily commute one way? How many miles?

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

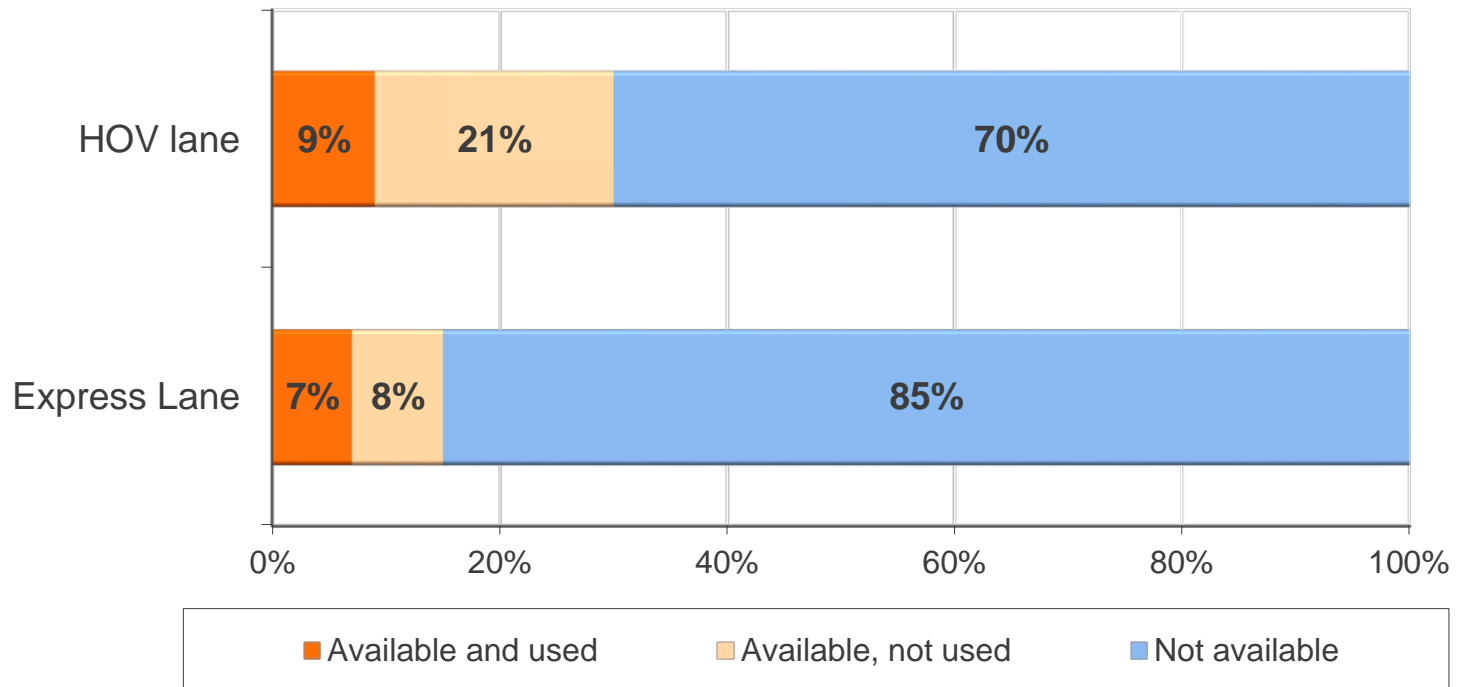
Eight in Ten Commuters Built Extra Time into their Commutes to Account for Traffic, Roadway Incidents, and Transit Delays

The average of 12 extra minutes was about 30% of the total 39 minute average commute



Three in Ten Commuters Said there Was an HOV Lane Along their Route to Work and 15% Said They Had Access to an Express Lane

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

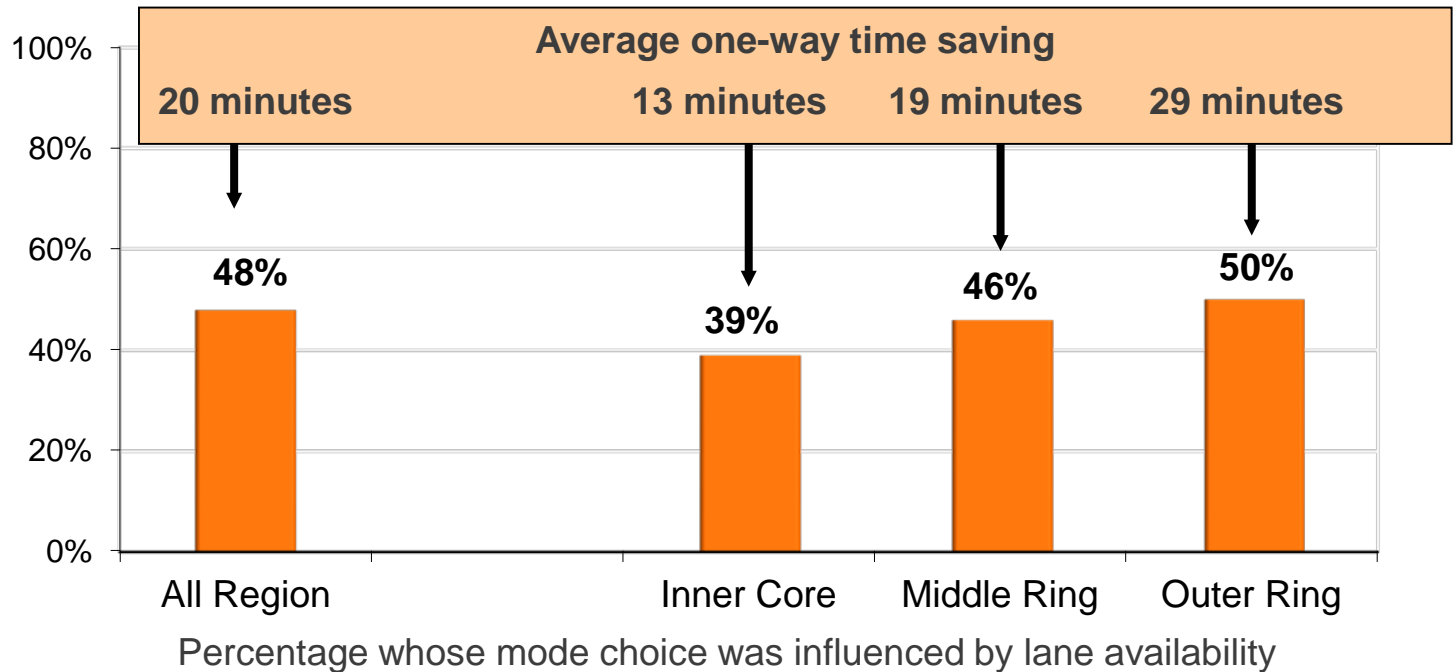


HOV/Express lane available
n = 5,239

Q46 Is there a special HOV (High Occupancy Vehicle) lane along your route to work?
Q47 Do you ever use the HOV lane to get to or from work?
Q47a Do you ever use the Express lane to get to or from work?

Commuters Who Used HOV/Express Lanes Saved an Average of 20 Minutes on their Commutes; 48% Said Lane Availability Influenced their Commute Decisions

Outer Ring commuters had the greatest time saving



All Region
n = 645

Inner Core
n = 126

Middle Ring
n = 190

Outer Ring
n = 329

Q50 How much time does the HOV or express lane save you in your one-way trip to or from work?

Q51 Did the HOV/Express lane influence your decision to use your current way of commuting?



Commute Ease and Commute Satisfaction

Key Findings

Six in ten commuters were satisfied with their commute, but commute satisfaction declined since 2013 – especially among transit riders – and commuting got more difficult for two in ten commuters in the past year

One-third of commuters who moved home/work said commute factors were important to their decision

In 2016, 22% of Commuters Reported a More Difficult Commute than a Year Ago – Same as 2013

Inner Core workers and commuters with long commutes were most likely to have a more difficult commute

More Difficult Commute

By Home Area

Inner Core – 22%

Middle Ring – 22%

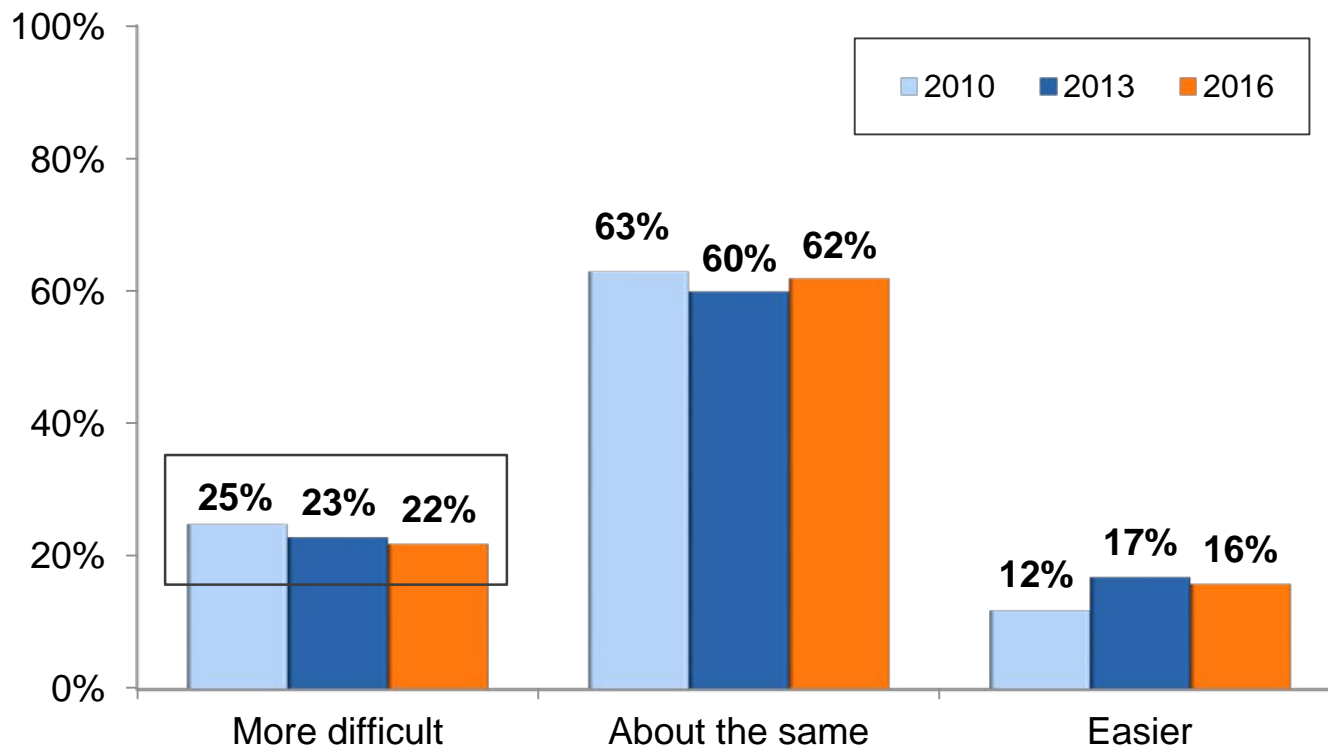
Outer Ring – 24%

By Work Area

Inner Core – 25%

Middle Ring – 21%

Outer Ring – 16%



2016
n = 5,142

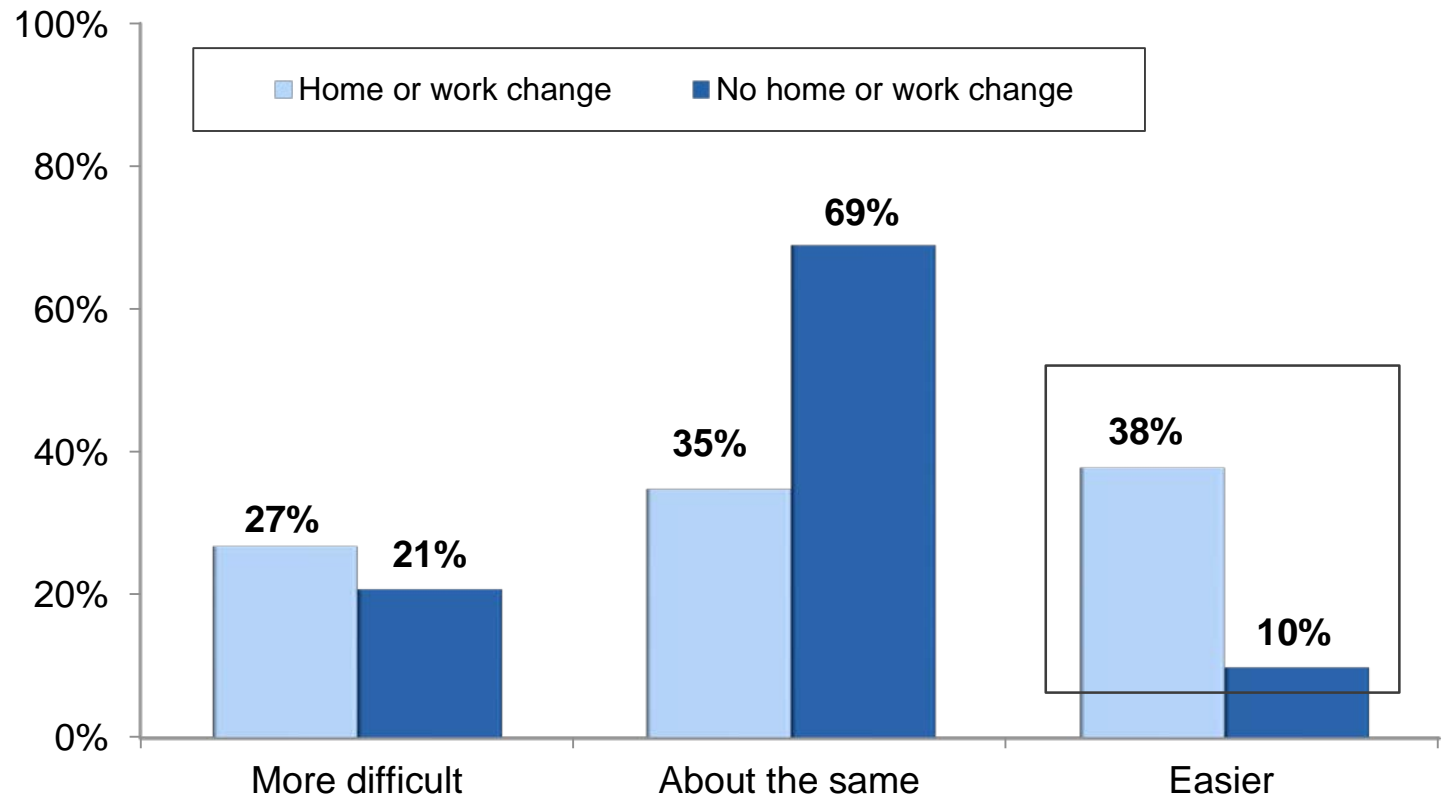
2013
n = 5,717

2010
n = 6,049

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

Commuters who Made Home/Work Changes were Much More Likely to Report an Easier Commute

49% of commuters who moved said the move shortened their commute distance/time; suggests a move could have played a role in improving the commute



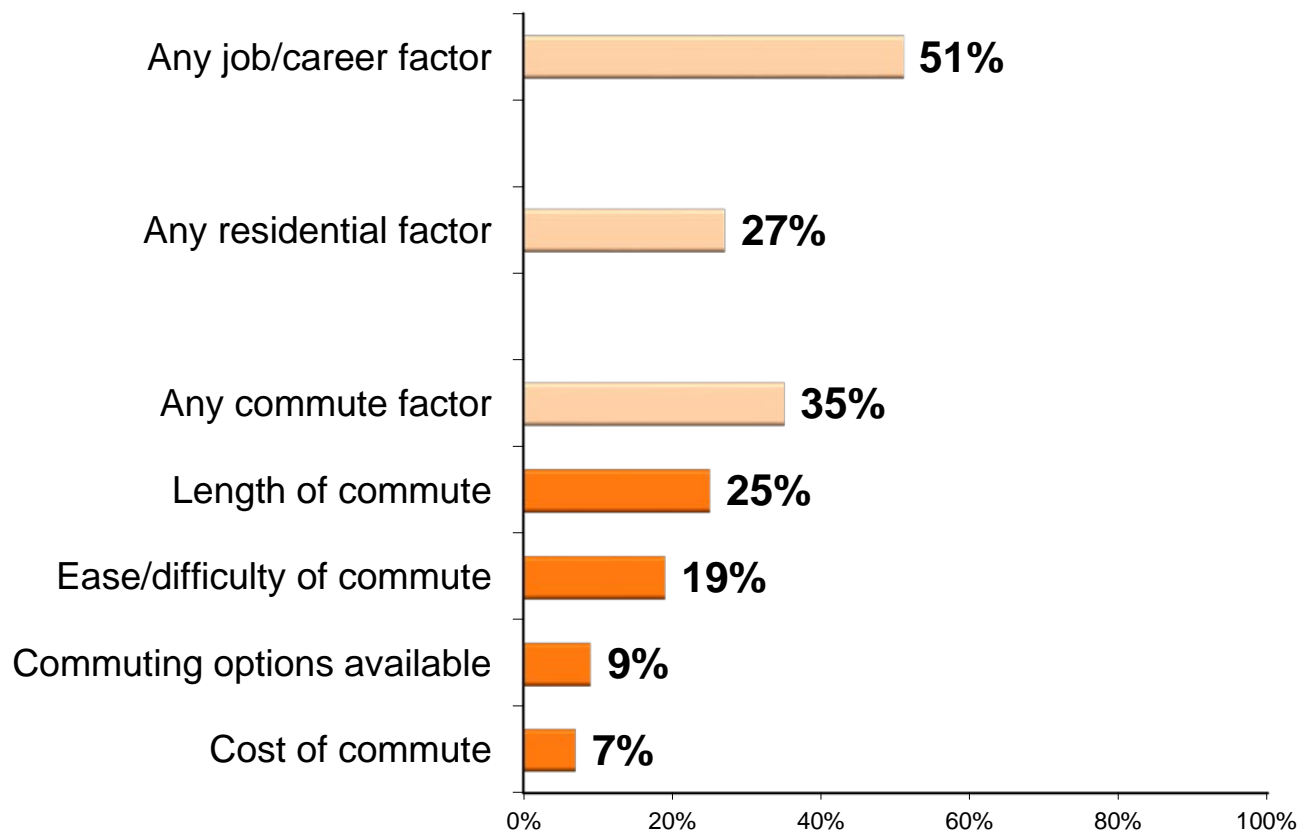
Home/work change
n = 862

No home/work
change
n = 4,361

Q57 – Would you say your commute is easier, more difficult, or about the same now as it was one year ago?
Q60 – Have you changed your work or home location in the last year?

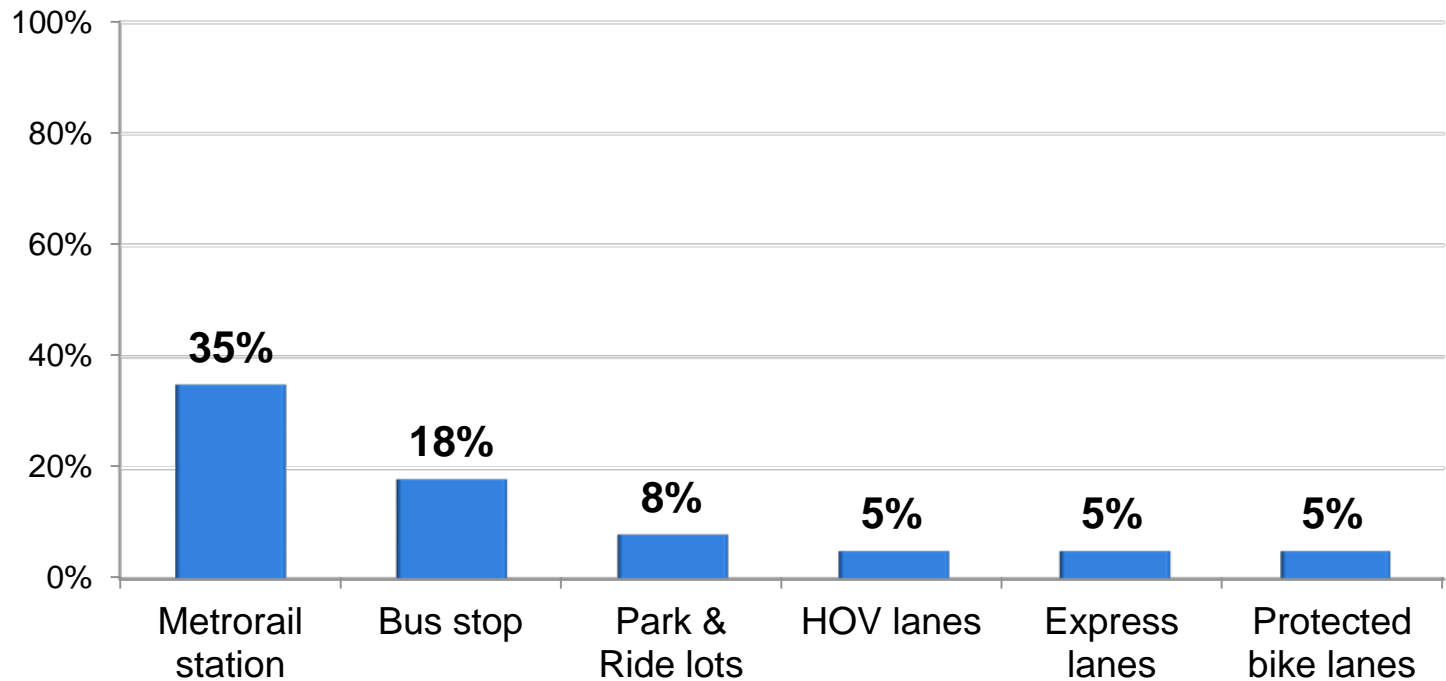
35% of Commuters who Made Home/Work Changes Said Commute Factors Had Been Important

13% said commute ease was the only factor they considered and 26% said it was more important than other factors



Four in Ten Commuters who Made Home/Work Changes Considered Availability of Transportation Services at the New Location

Respondents who said commute factors were most important were most likely to have considered transportation access

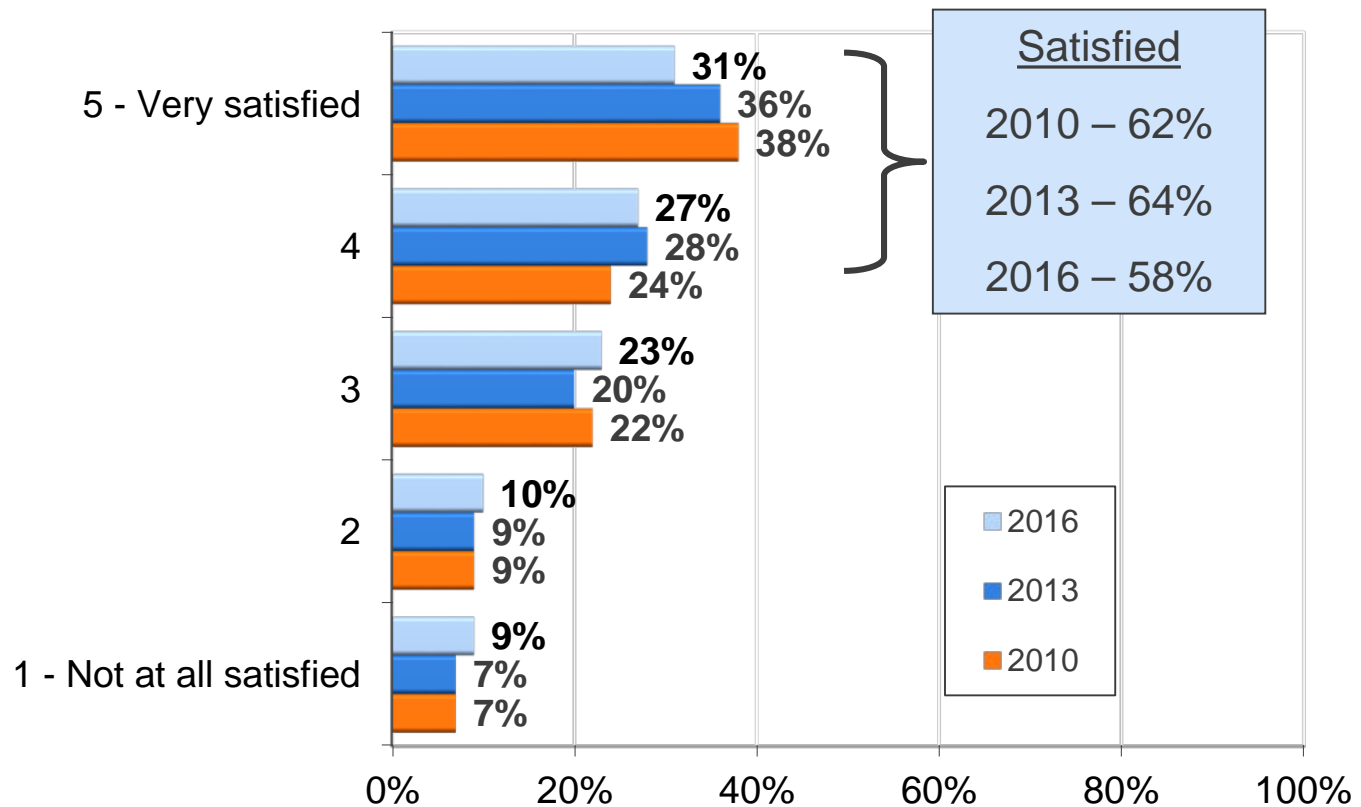


Q60 – Have you changed your work or home location in the last year?

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?

58% of Commuters Were Satisfied with their Commute in 2016, Lower than in 2013 or 2010

More than 73% of commuters with an easier commute were satisfied with their commute, compared with 31% who had a more difficult commute



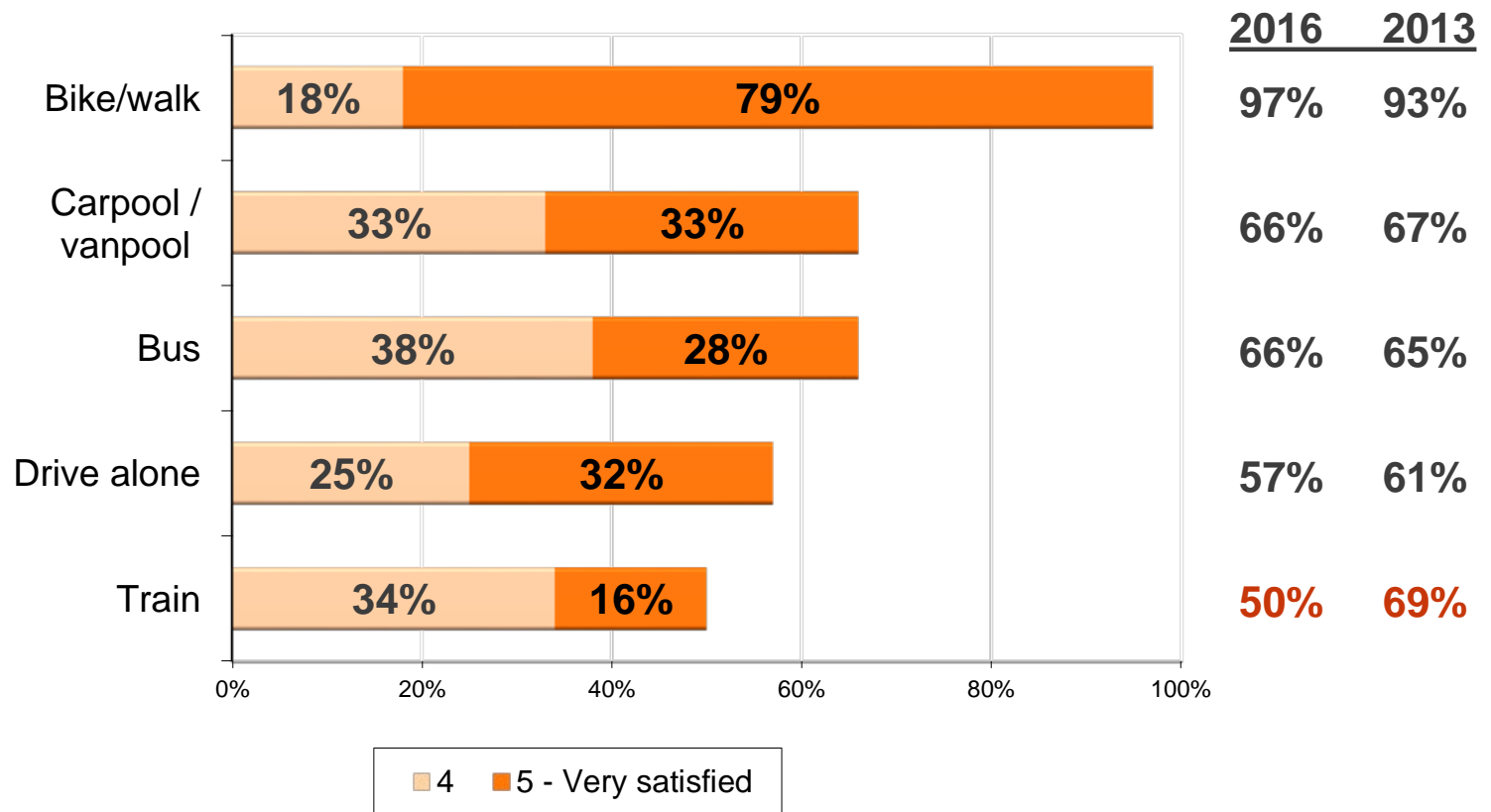
2013
n = 5,692

2010
n = 6,033

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

Bikers/Walkers Were Most Satisfied; Commuters Who Drove Alone / Rode Trains Were Least Satisfied

Satisfaction in 2016 was similar to 2013, except that train riders were **NOTABLY LESS** satisfied in 2016



Bike/walk
n = 180

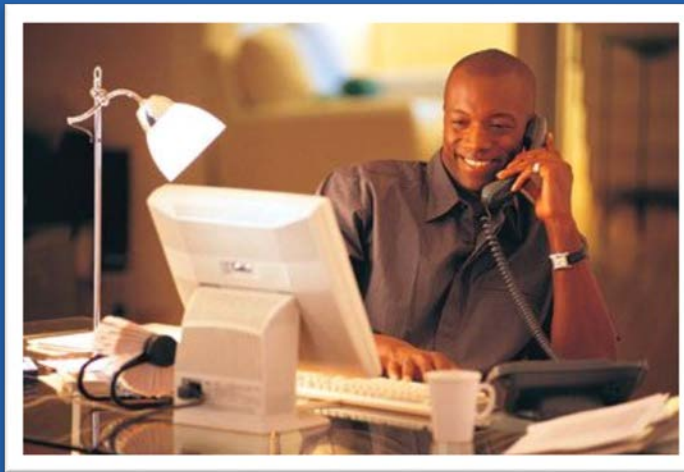
Train
n = 688

Carpool/vanpool
n = 283

Bus
n = 283

Drive alone
n = 3,552

Q15. Now thinking about LAST week, how did you get to work each day.
Q56f - Overall, how satisfied are you with your trip to work?



Telework Experience

Key Findings

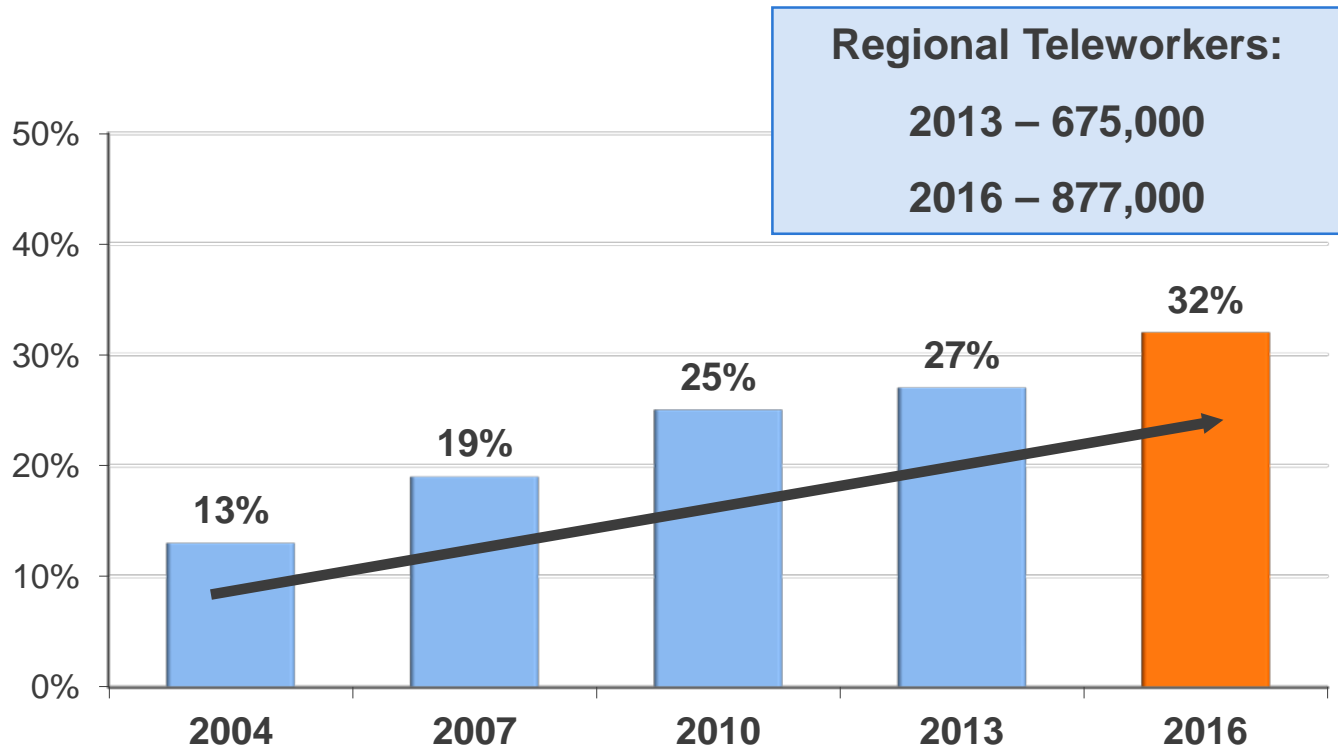
Telework continued to climb – one-third of commuters (887,000) said they teleworked at least occasionally

An additional 13% of regional workers (367,000) who said they did NOT telework worked at home occasionally

91% of teleworkers and 80% of non-teleworkers who work at home were likely to TW/work at home on a “major event” day

Telework More Than Doubled Since 2004 – 32% of Regional Commuters Teleworked at Least Occasionally

Between 2013 and 2016, the region added 202,000 new teleworkers for a 2016 total of 877,000



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

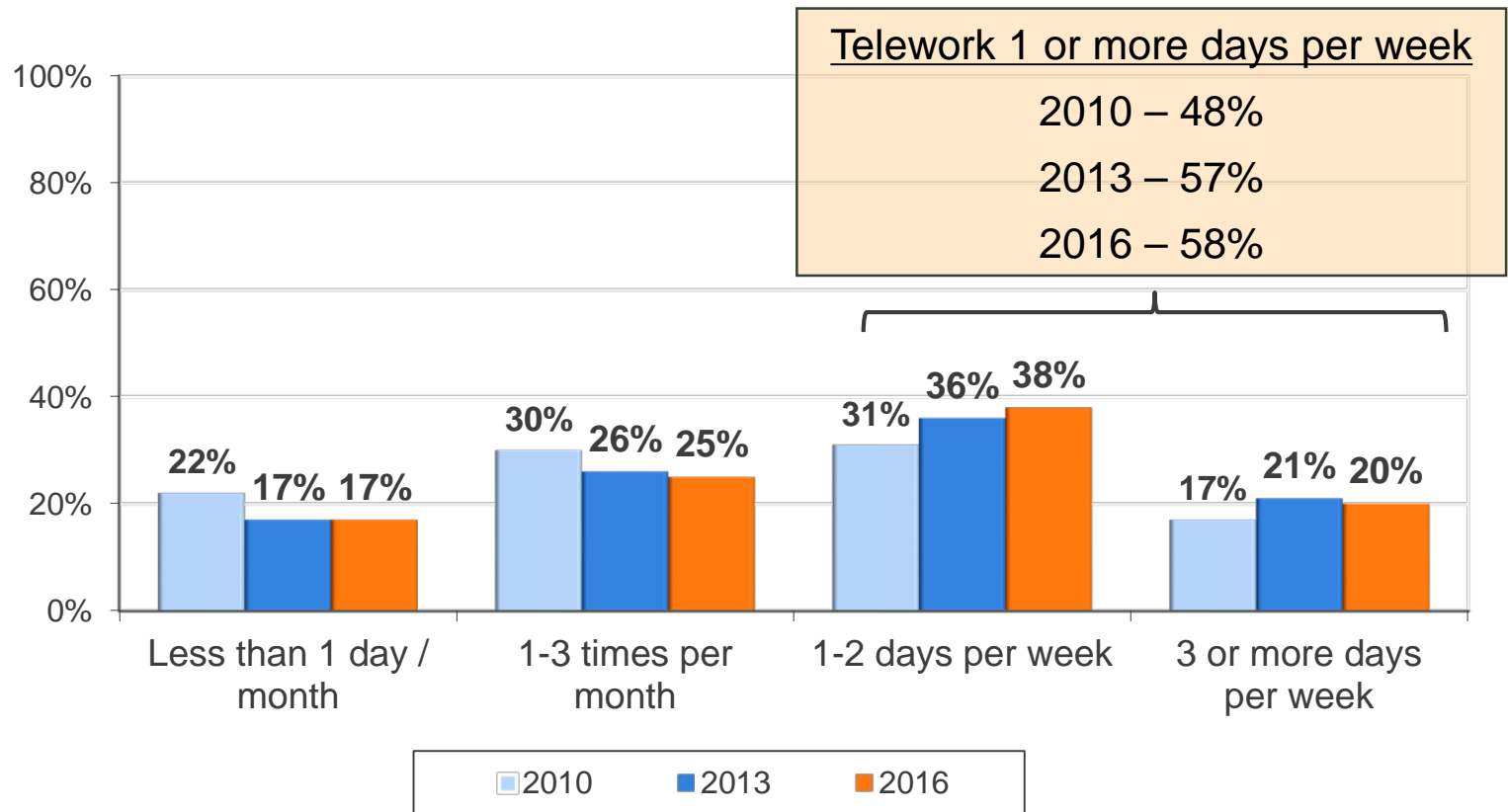
2016 SOC
n = 5,503

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?

58% of Teleworkers Teleworked at Least One Day per Week and 20% Teleworked 3+ Days per Week

The average TW frequency was 1.4 days/week, the same as in 2013



2016
n = 1,874

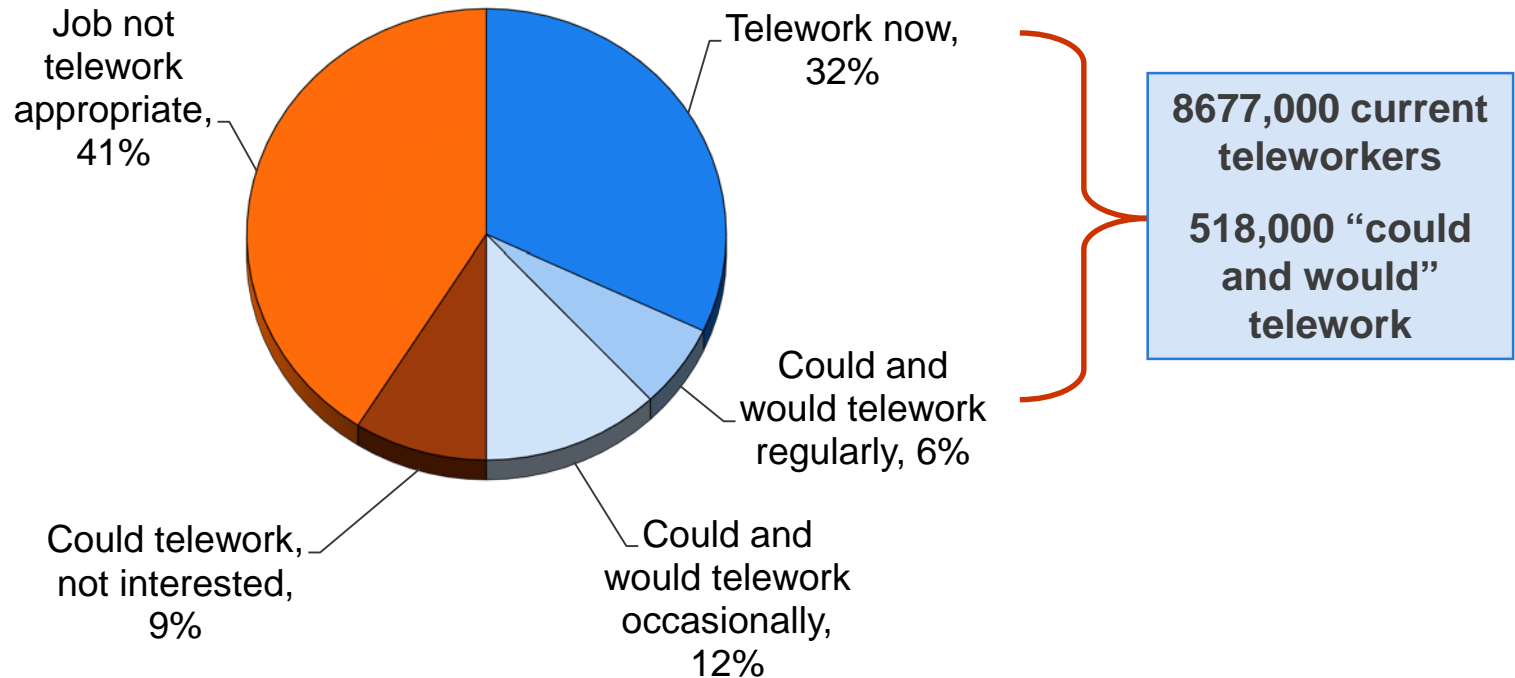
2013
n = 1,559

2010
n = 1,529

Q14 How often do you usually telecommute?

518,000 Non-teleworkers Had Job Responsibilities that Were Telework-Appropriate and Would Like to Telework

Two-thirds of interested workers would like to telework “regularly” and one-third would like to telework “occasionally”



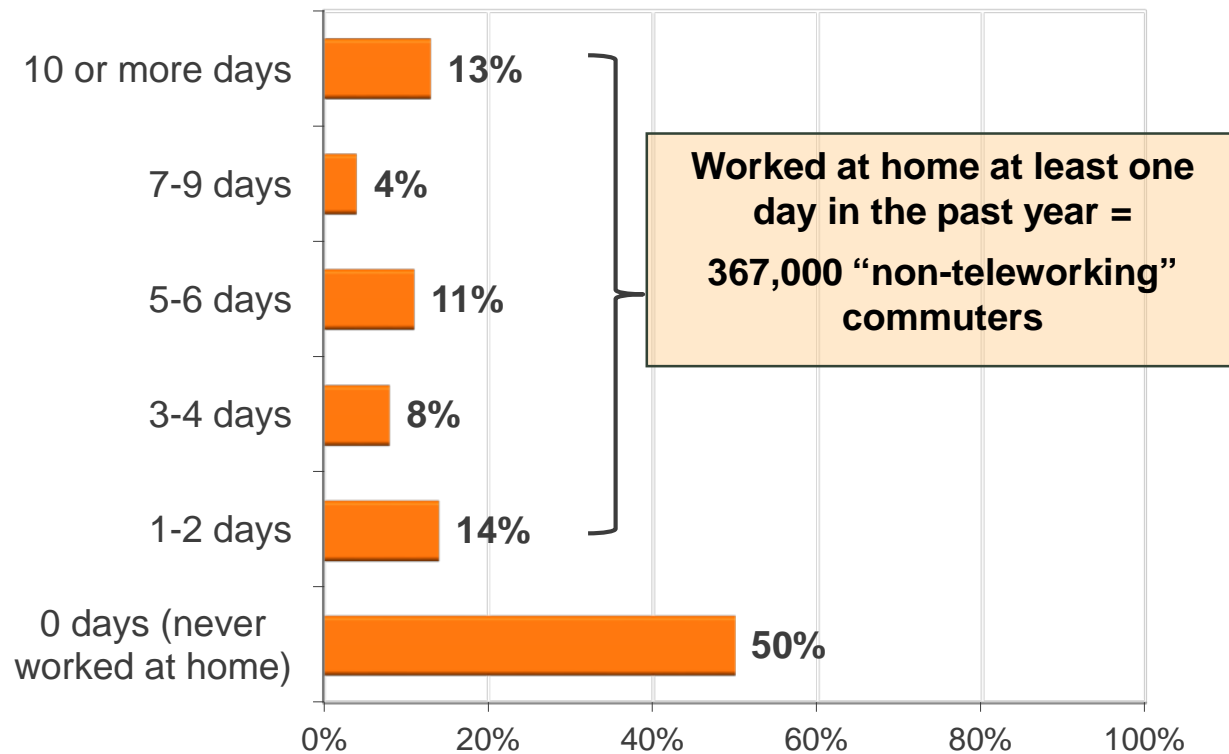
2016
n = 5,503

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?

Half of Commuters Who Were NOT Teleworkers But had TW-Appropriate Jobs Said they Worked at Home All Day at Least One Regular Work Day Last Year

They averaged 7 work at home days per year (about 0.14 days/week)

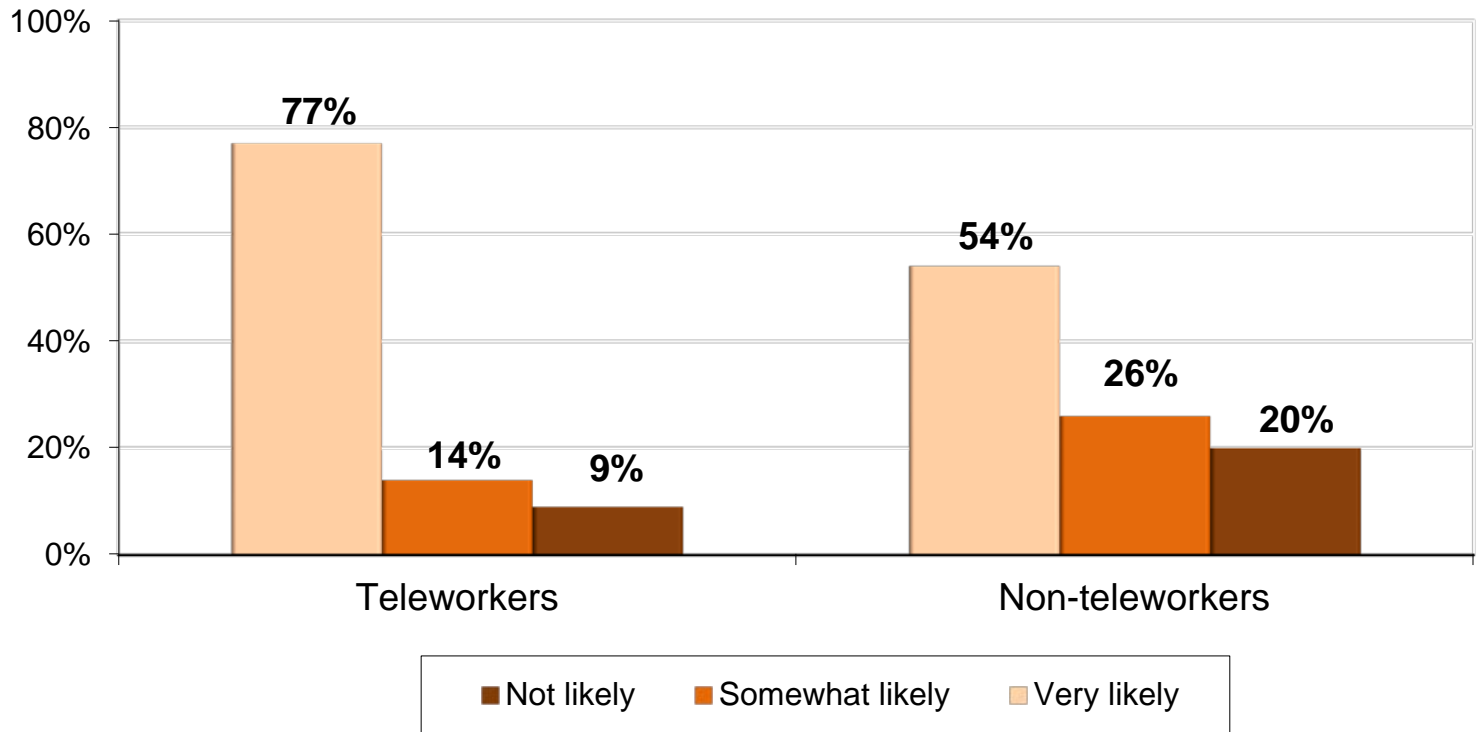


Non-teleworking commuters who have telework-appropriate jobs
n = 1,353

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

91% of Teleworkers and 80% of Non-teleworkers who Sometimes Worked at Home Were Likely to Telework/Work at Home on Days When Traffic Would be Disrupted by a Major Event in the Region

So TW likely has a greater impact than “typical week” use would suggest



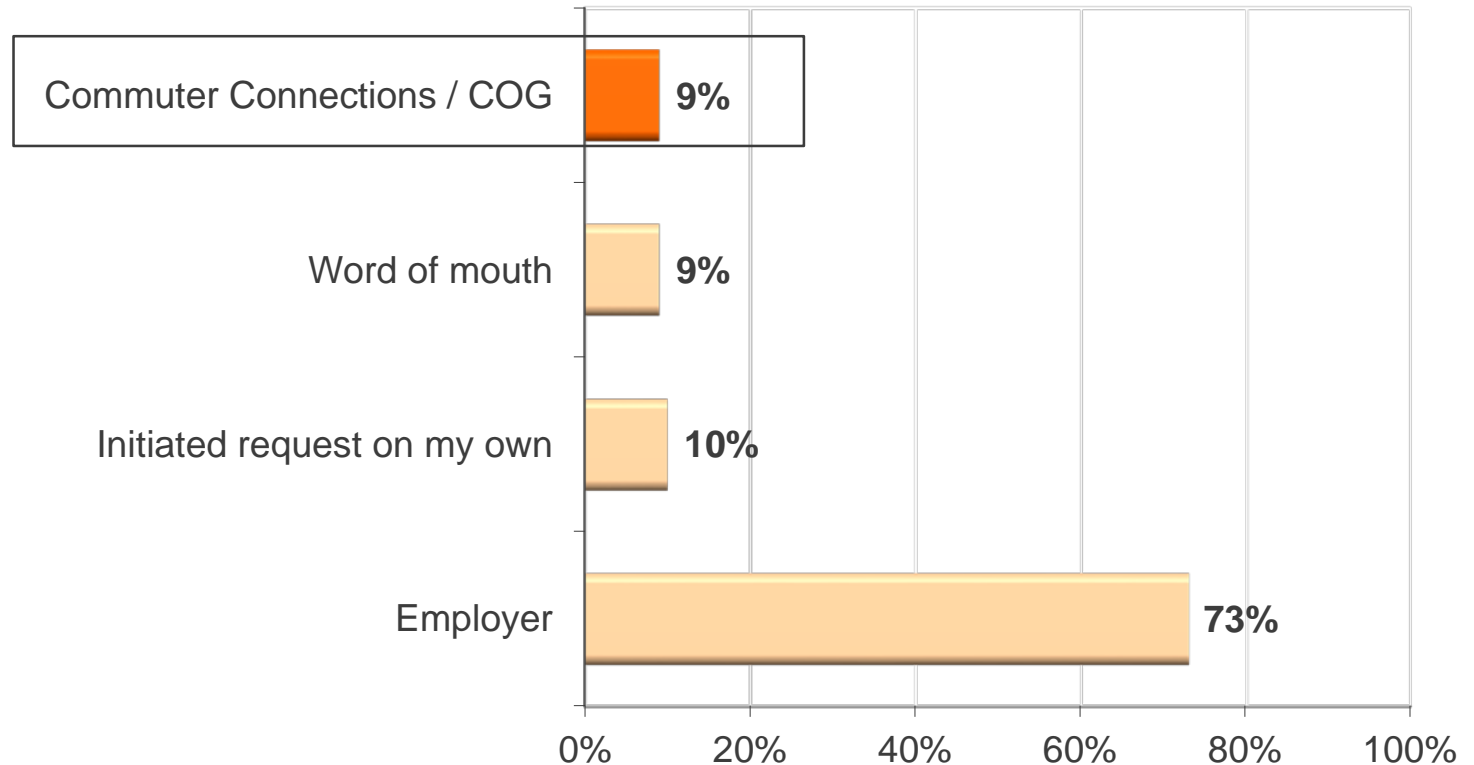
Teleworkers
n = 1,609

Non-teleworkers
who work at home
occasionally
n = 705

Q14a / Q14g Thinking about a day when traffic in the region is likely to be disrupted due to a snowstorm or a major or special event, how likely are you to [telework, work at home] that day to avoid the traffic? Are you very likely, somewhat likely, or not likely?

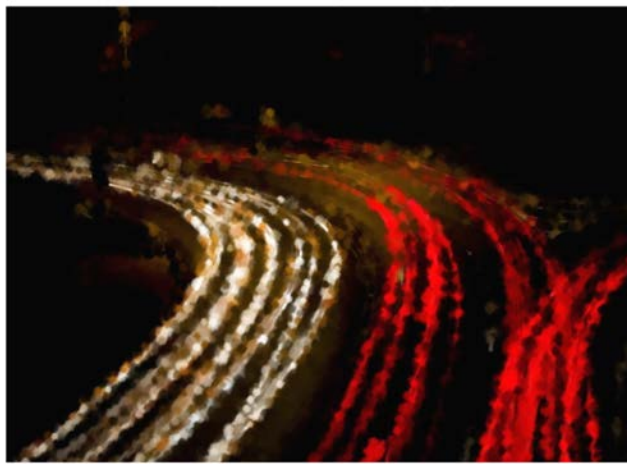
One in Ten Teleworkers Received Telework Information from Commuter Connections / COG, About the Same Share as in 2013

Most learned about telework from their employer



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?



Transportation Satisfaction

Key Findings

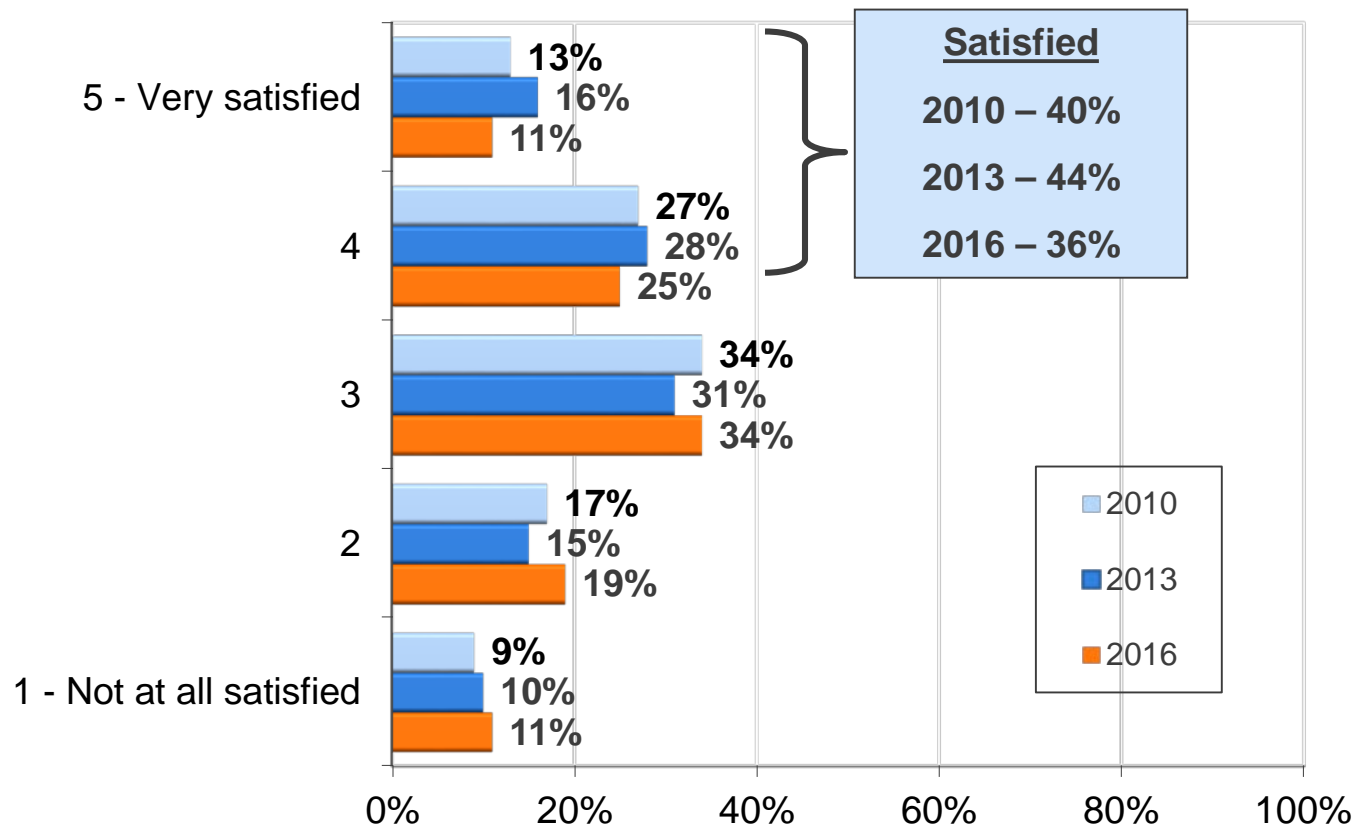
Only 36% of regional commuters were satisfied with the regional transportation system in 2013; satisfaction declined between 2013 and 2016

Nine in ten alt mode users cited personal benefits of using alternative modes – reduced cost, stress; productive use of time

Half of alt mode users performed work tasks while commuting

Commuters Were Less Satisfied with Transportation in 2016 than in 2013 or 2010

Transportation satisfaction also was lower than commute satisfaction (58%), suggesting commuters had found an acceptable commute, but were not as happy with transportation options overall



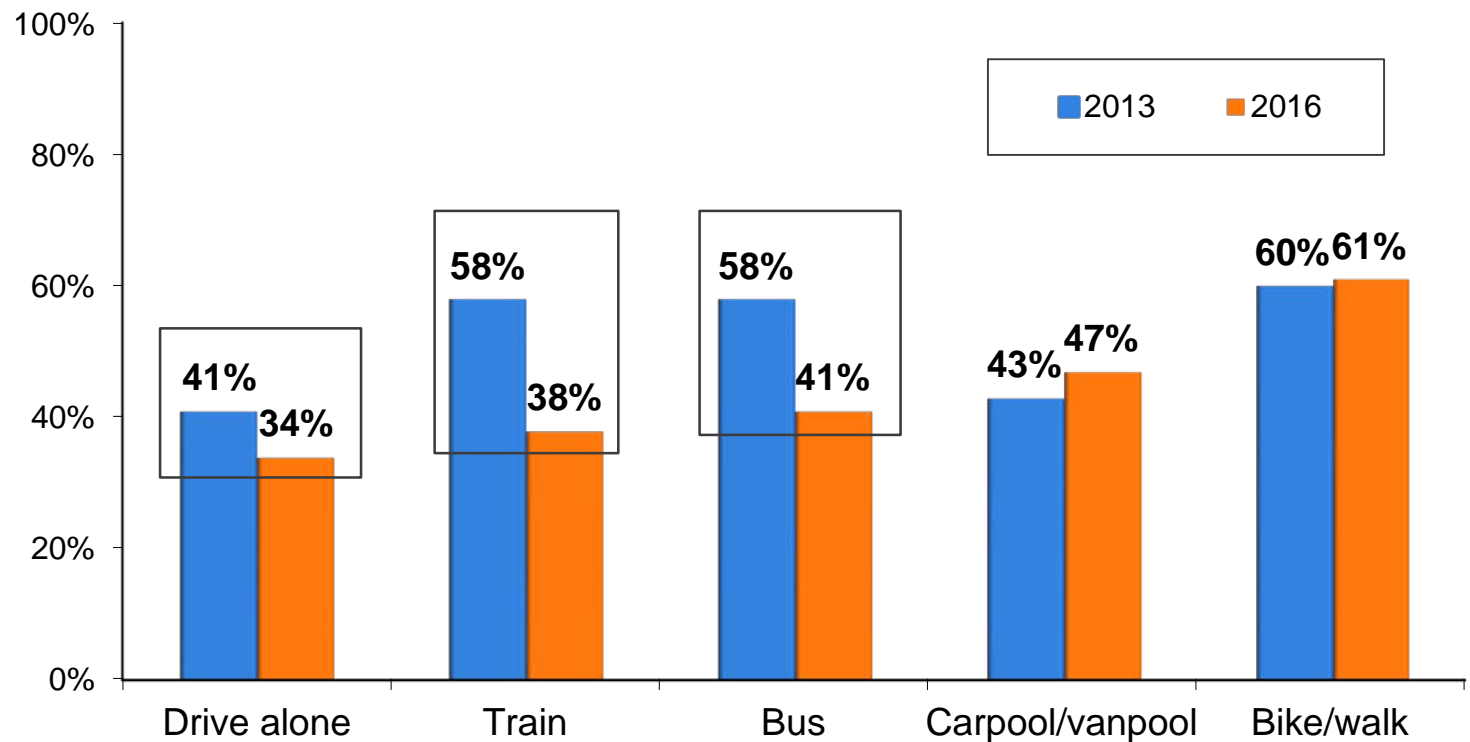
2010
n = 6,420

2013
n = 5,486

2016
n = 5,093

Transportation Satisfaction Declined Notably for Transit Riders Between 2013 and 2016

Satisfaction also was lower for commuters who drove alone, but to a lesser extent; carpool/vanpool and bike/walk commuters were about as satisfied with regional transportation in 2016 as in 2013



Drive alone
n = 3,439

Carpool/vanpool
n = 282

Bus
n = 283

Train
n = 687

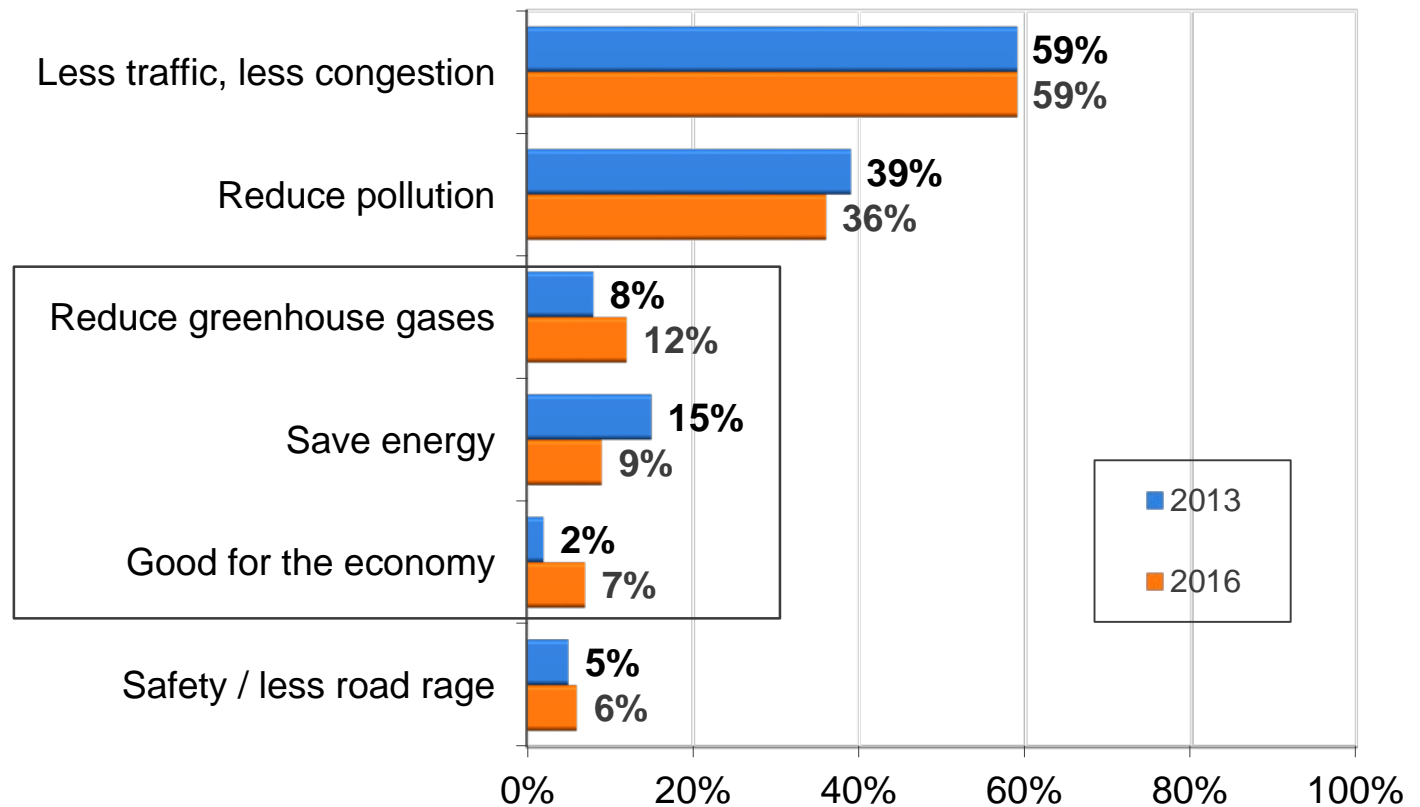
Bike/walk
n = 176

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

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

80% of Respondents Cited Societal Benefits from Alternative Mode Use

Benefits mentioned in 2016 were generally similar to those noted in 2013, but saving energy was mentioned less often in 2016 and reducing greenhouse gases and good for economy were mentioned more often



2013
n = 5,718

2016
n = 5,239

Q56a. What impact or benefit does a community or region receive when people use these types of transportation?

90% of Alternative Mode Users Mentioned a Personal Benefit – Different Benefits by Mode

Transit riders and bike/walk commuters particularly mentioned quality of life benefits, carpooler/vanpoolers noted companionship and saving time

Personal Benefit	All Alt Mode Users	Carpool/Vanpool	Bus	Train	Bike/Walk
Save money	33%	40%	36%	24%	41%
Avoid stress, relax	22%	15%	22%	27%	17%
Use travel time productively	18%	13%	23%	18%	13%
Get exercise, health	13%	1%	3%	6%	73%
Arrive at work on time	10%	9%	6%	12%	7%
No need for a car	8%	2%	7%	11%	3%
Save time, travel faster	7%	13%	3%	5%	13%
Companionship on commute	7%	23%	5%	3%	0%
Help the environment/ GHG	6%	1%	2%	9%	9%
Less wear and tear on car	3%	6%	2%	4%	1%

All commuters
n = 1,555

Carpool/Vanpool
n = 283

Bus n = 288

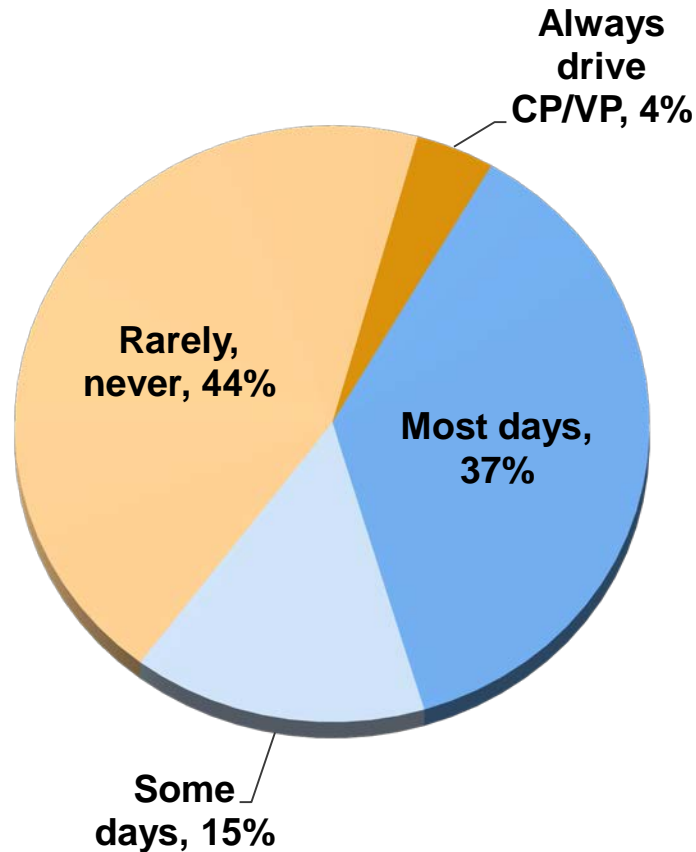
Train n = 692

Bike/Walk n = 180

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?

Half of Commuters who Used Alternative Modes Performed Work-related Tasks During their Commute at Least Some Days

37% performed work-related tasks “most days”



Work Related Tasks at Least Some Days By Mode

Bus – 59%

Train – 57%

Carpool – 30%



Regional and Local Commute Services

Key Findings

Six in ten commuters said a commute info number/website was available; two in ten had used the number/site

Six in ten commuters knew of Commuter Connections; 7% of regional commuters had used a CC service

Awareness of local commute services ranged from 9% to 51% of targeted commuters

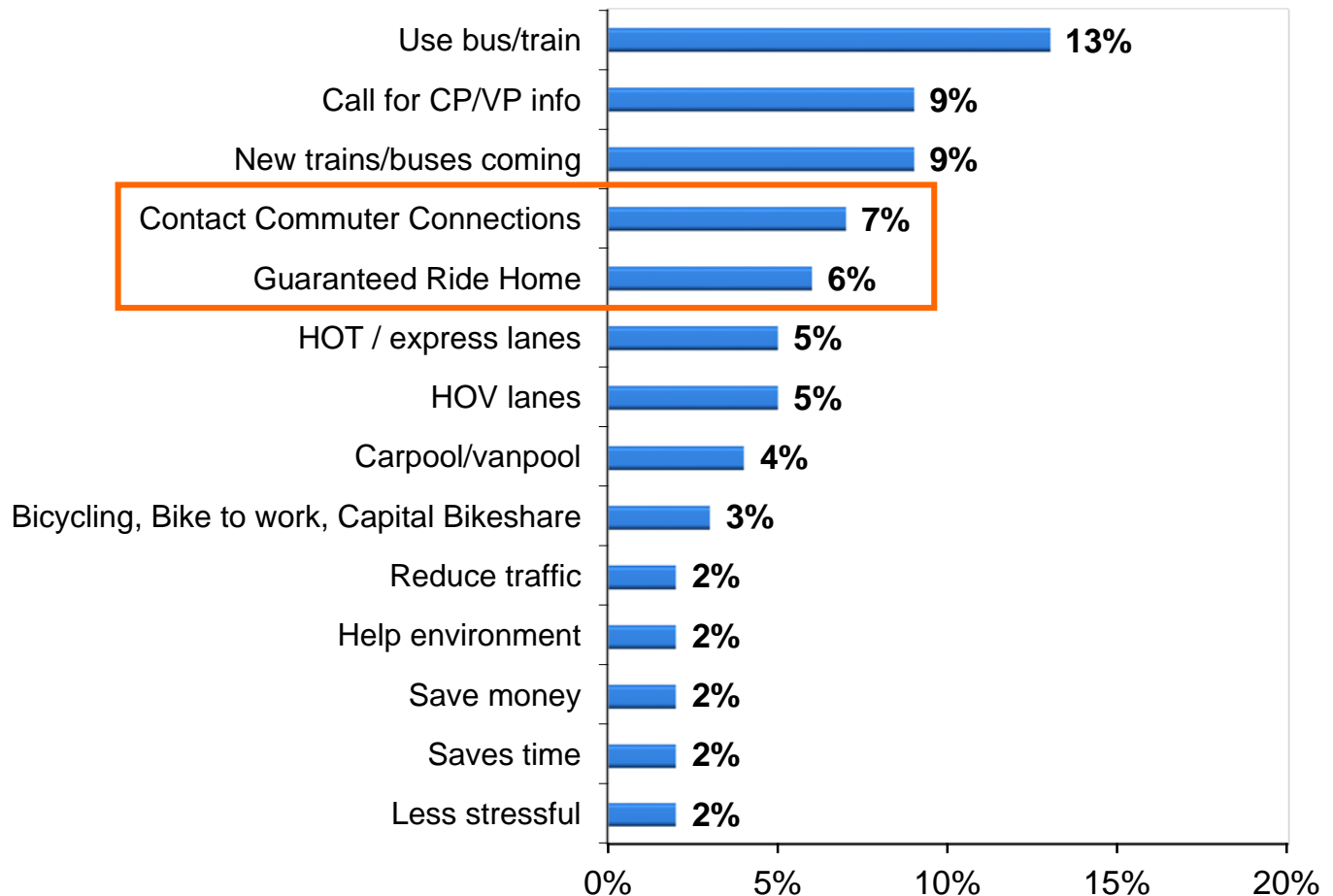
54% of Respondents Recalled Hearing/Seeing Commute Ads in the Past Year – Same as in 2013

67% who were aware of ads could name a specific message

Name the sponsor:

23% named WMATA

13% named Commuter Connections or COG

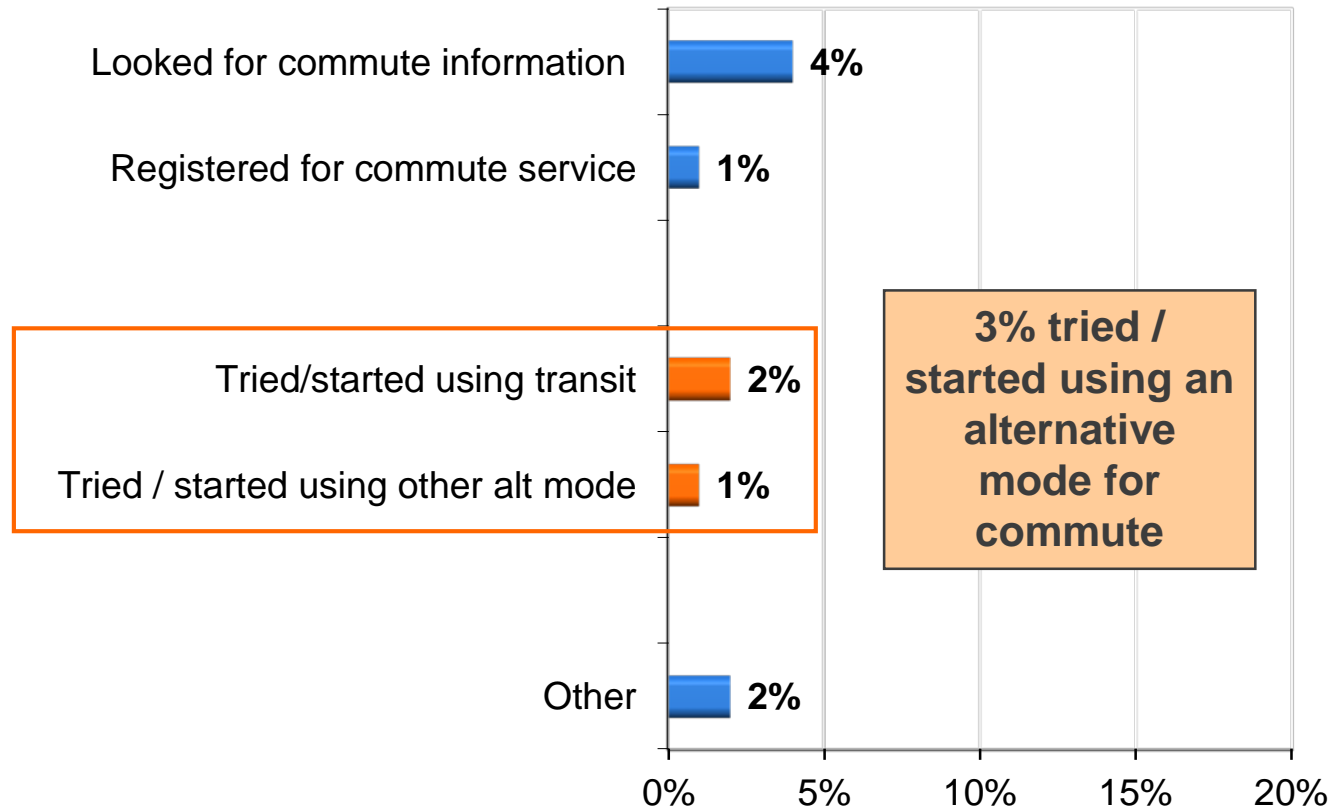


9% of Respondents who Recalled Messages Took an Action to Try to Change their Commute

3% tried or started using an alternative mode for their commute

61% who took action said the ad encouraged the action

48% who switched modes were driving alone before

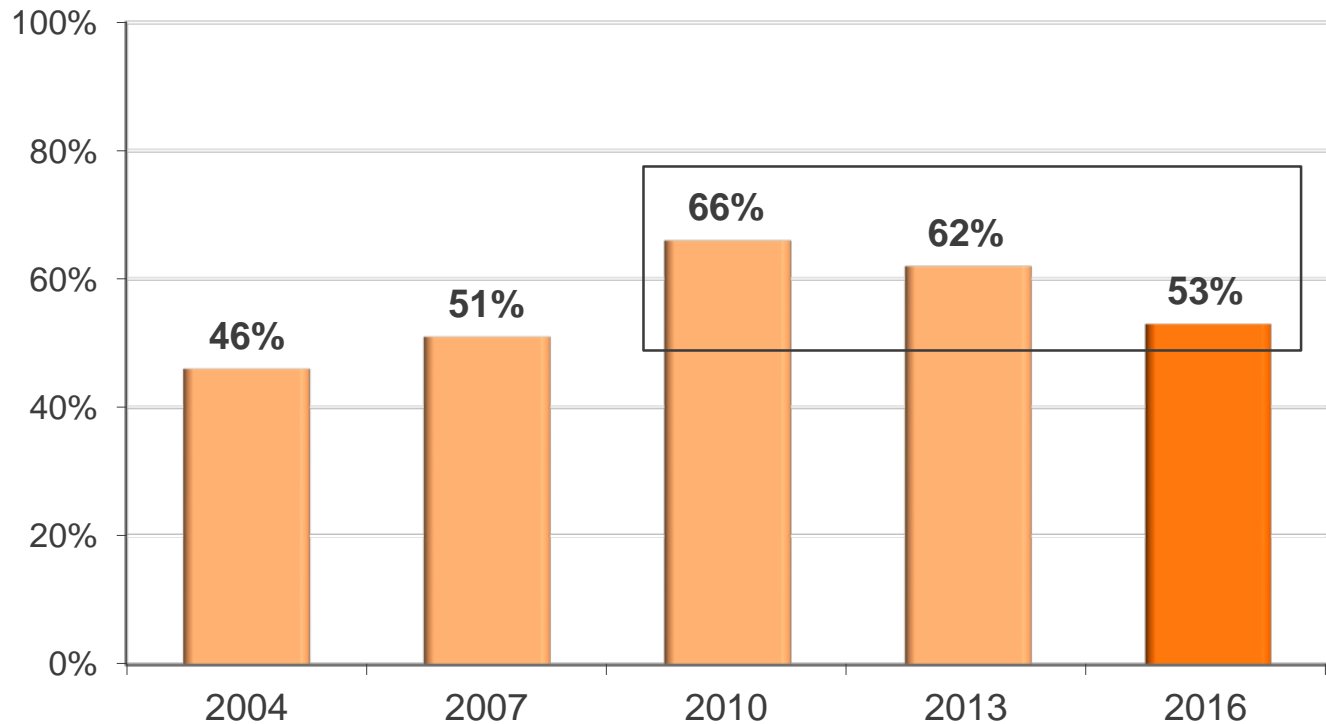


Q66 After seeing or hearing this advertising, did you take any actions to try to change how you commute?
Q68. Did the advertising you saw or heard encourage you to take this action?

53% of Commuters Said a Commute Information Phone Number or Website Existed

Awareness of regional commute information resources declined further in 2016, back to the level in 2007

22% of regional commuters had used a commute info resource in the past year



2004 SOC
n = 7,200

2007 SOC
n = 6,600

2010 SOC
n = 6,629

2013
n = 6,335

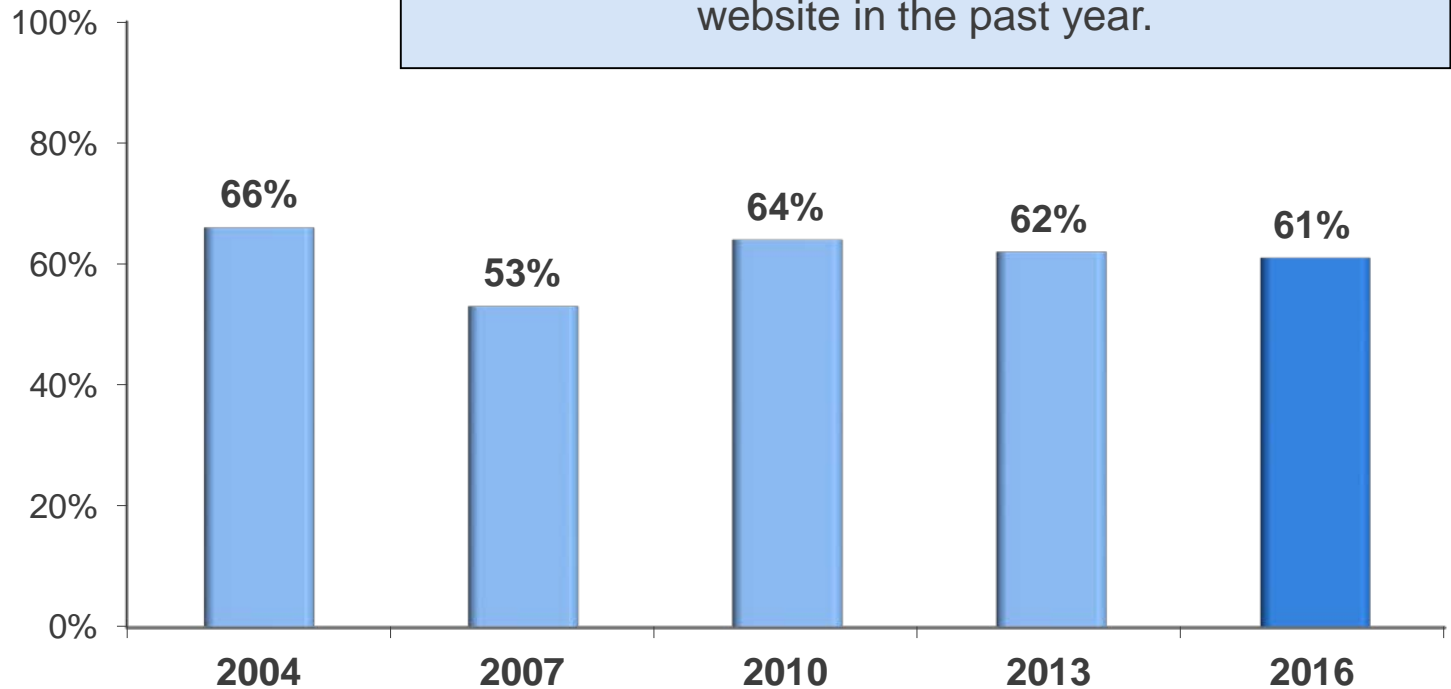
2016 SOC
n = 5,903

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?

61% of Regional Commuters Knew of Commuter Connections; the Same Share as in 2013

Use of Commuter Connections increased – from 5% of regional commuters in 2010, to 6% in 2013 and to 7% in 2016

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

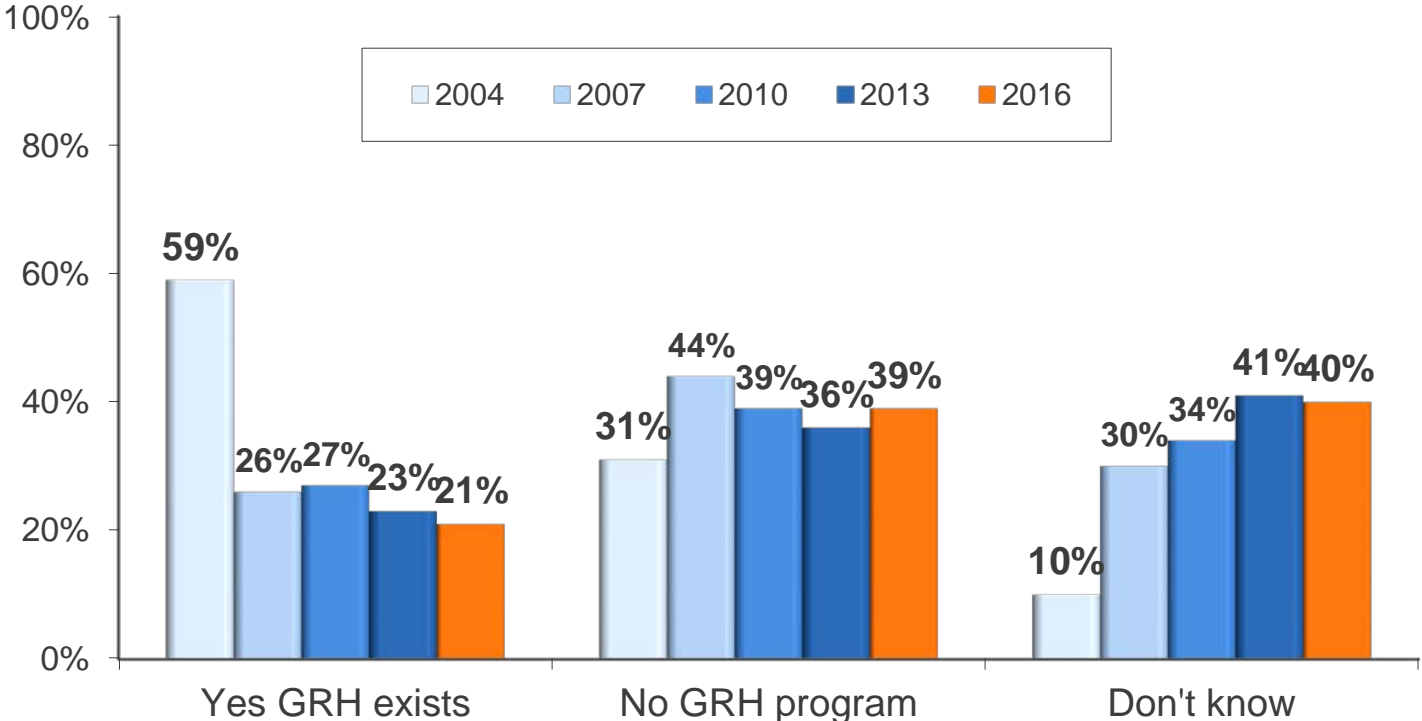
Q86 Have you heard of an organization in the Washington region called Commuter Connections?

21% of Commuters Knew There was a Regional GRH Program; 39% Said No Program, 40% Didn't Know

Awareness of GRH declined slightly since 2010, but was much lower than in 2004, when 59% knew of GRH

Of commuters who said there is a GRH program, 36% named Commuter Connections as the sponsor

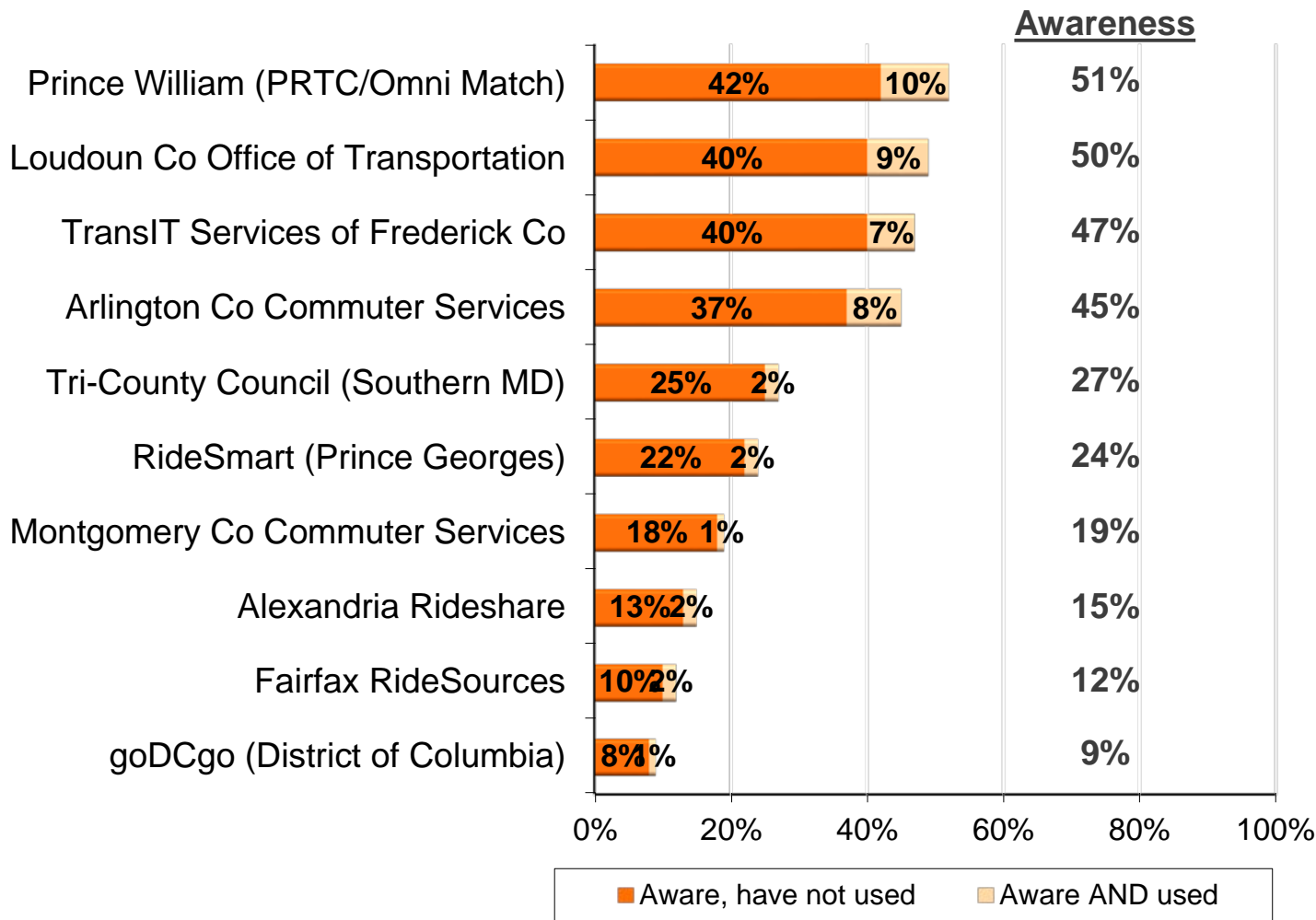
52% didn't know the sponsor



- 2004 SOC n = 6,867
- 2007 SOC n = 6,071
- 2010 SOC n = 6,084
- 2013 SOC n = 5,738
- 2016 SOC n = 5,266

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 rideshare or use public transportation?

Awareness of Local Commute Assistance Services Ranged from 9% to 51%; Use Ranged from 1% to 10%



Prince William
n = 589

Loudoun
n = 625

Frederick
n = 531

Arlington
n = 816

Southern Maryland
n = 972

Prince George's
n = 730

Montgomery
n = 827

Alexandria
n = 738

Fairfax
n = 1,156

District of Columbia
n = 1,880

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

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



Employer Services

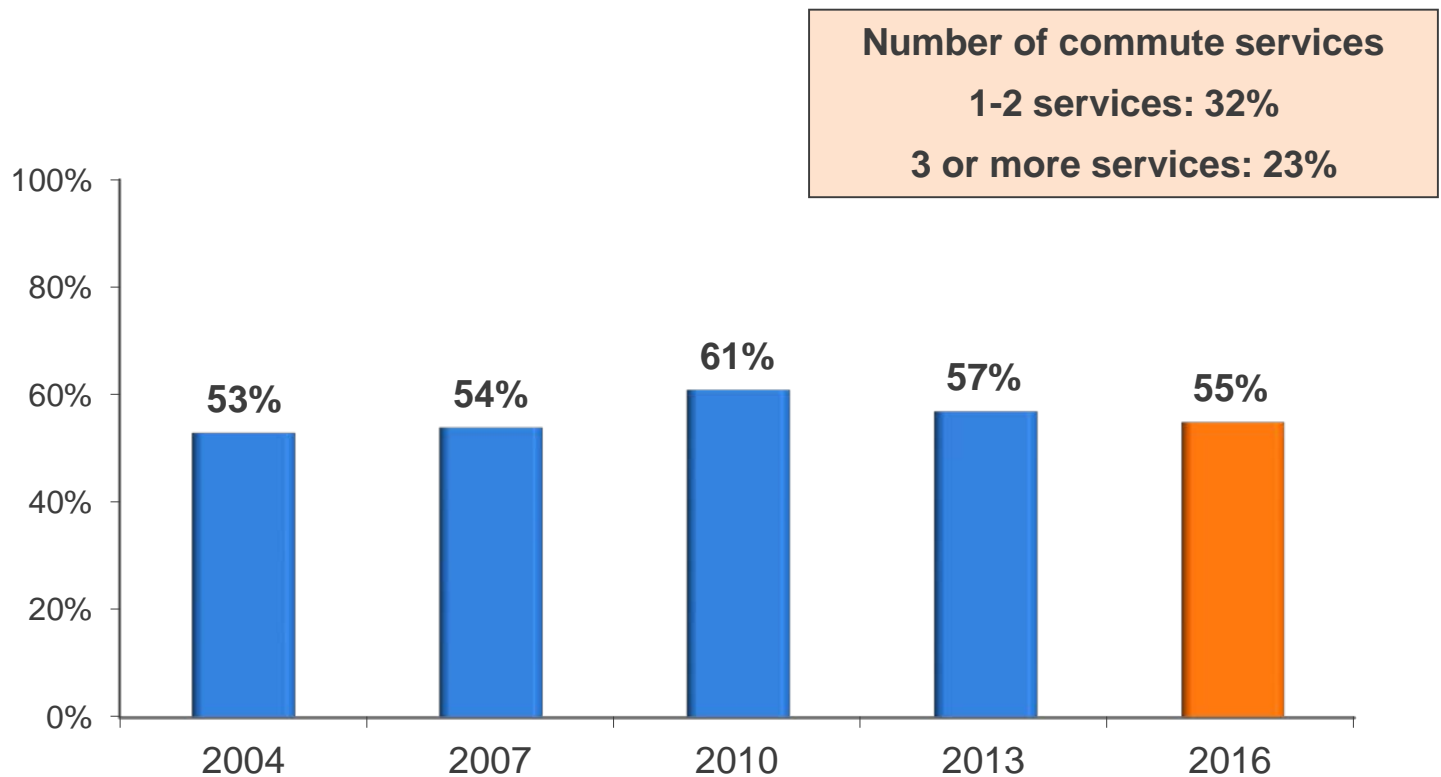
Key Findings

55% of commuters said their employers offered workplace commute services, about the same as in 2013, but a drop from 61% in 2010 – Decline was primarily in transit/vanpool subsidies

Half of commuters who had access to services had used at least one service; 59% used transit/vanpool subsidies and 30% used commute information

55% of Respondents who were Not Self-Employed Said their Employers Offered Commute Services

Availability was lower than in 2010 (61%); suggests that employers that cut services during the recession had not re-started them



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

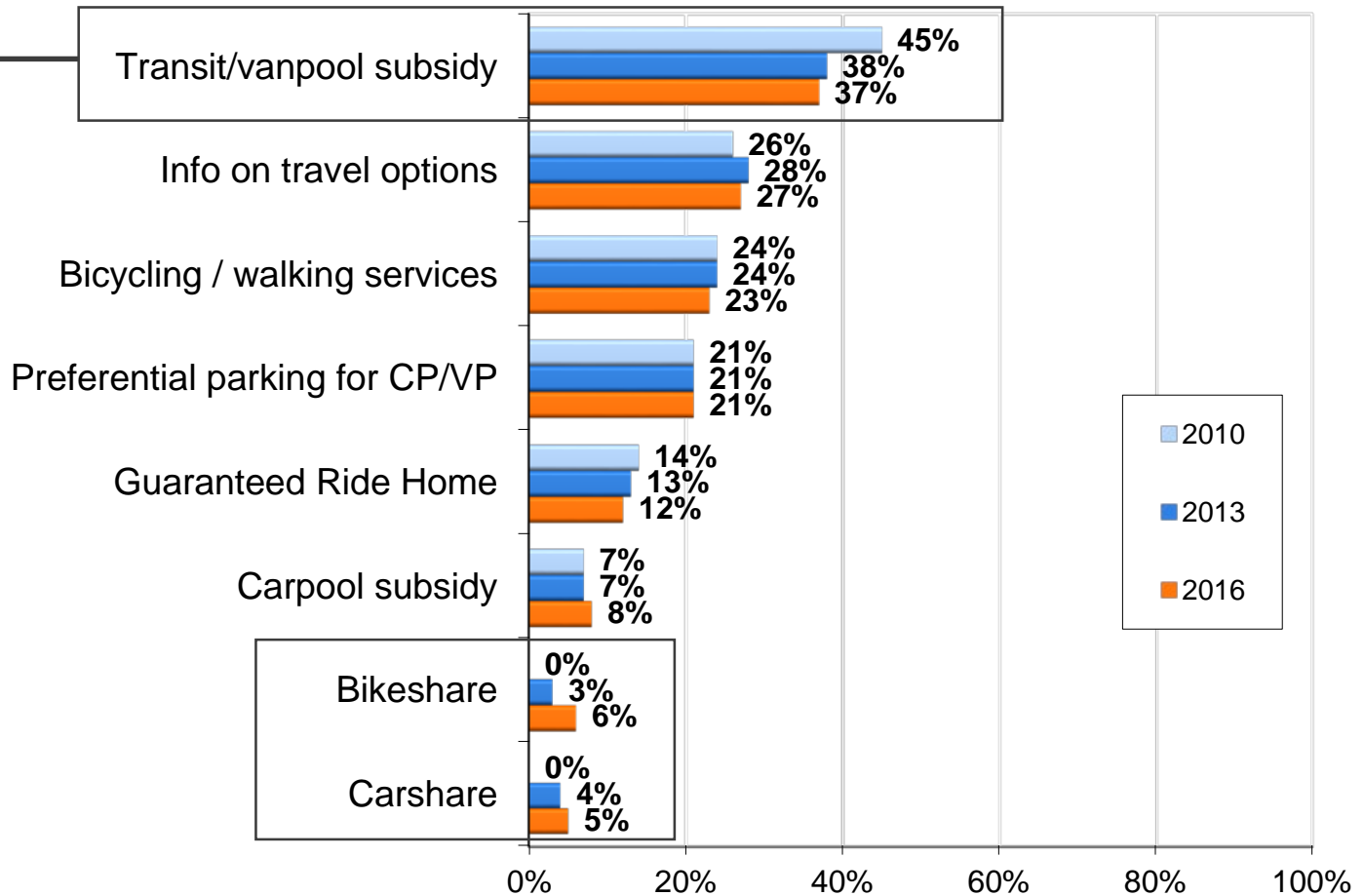
Q89 Next please tell me if your employer makes any of the following commute services or benefits available to you and, if they are available, have you used them. How about.... ?

The Most Widely Available Service in 2016 Was a Transit/Vanpool Subsidy (37% of Respondents)

But fewer respondents had this subsidy in 2016 than in 2010;
Availability of carshare and bikeshare increased since 2010

Transit/Vanpool Subsidies

- 35% Pre-tax deduction (employee-paid)
- 27% Direct cash payment (employer-paid)
- 10% SmarTrip card or voucher
- 28% Unknown



2010 SOC
n = 5,899

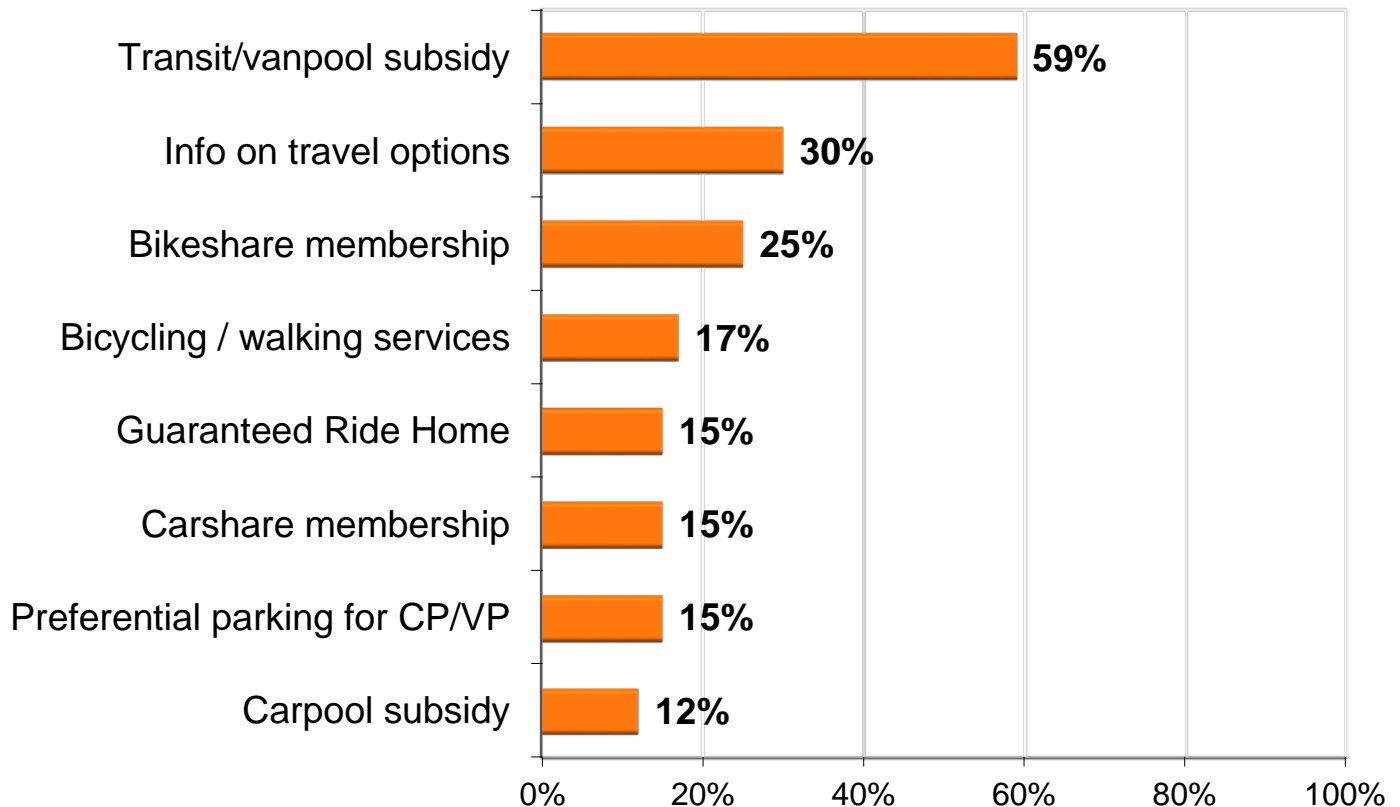
2013 SOC
n = 5,524

2016 SOC
n = 5,086

Q89 Next please tell me if your employer makes any of the following commute services or benefits available to you.

Transit/Vanpool Subsidy Also Was the Most Widely USED Employer Service – used by 59% of respondents with access to the service

30% of respondents with access had used travel option information; other services used by two in ten with access



Q89a Which of those services have you used?

Transit/vanpool
subsidy n = 1,962

Info on travel
options n = 1,425

Bikeshare n = 291
GRH n = 643,

Bike/walk services
n = 1,284

Carshare n = 226

Preferential
parking n = 1,078

Carpool subsidy
n = 407

Six in Ten Commuters Were Permitted to “Flex” or Adjust their Work Start/End Times, at Least Somewhat

About half of these commuters would consider shifting their work hours outside the peak period to receive a \$3 per day incentive

Younger respondents and long-distance commuters were most interested

Under 35 – 67%

35-44 years – 53%

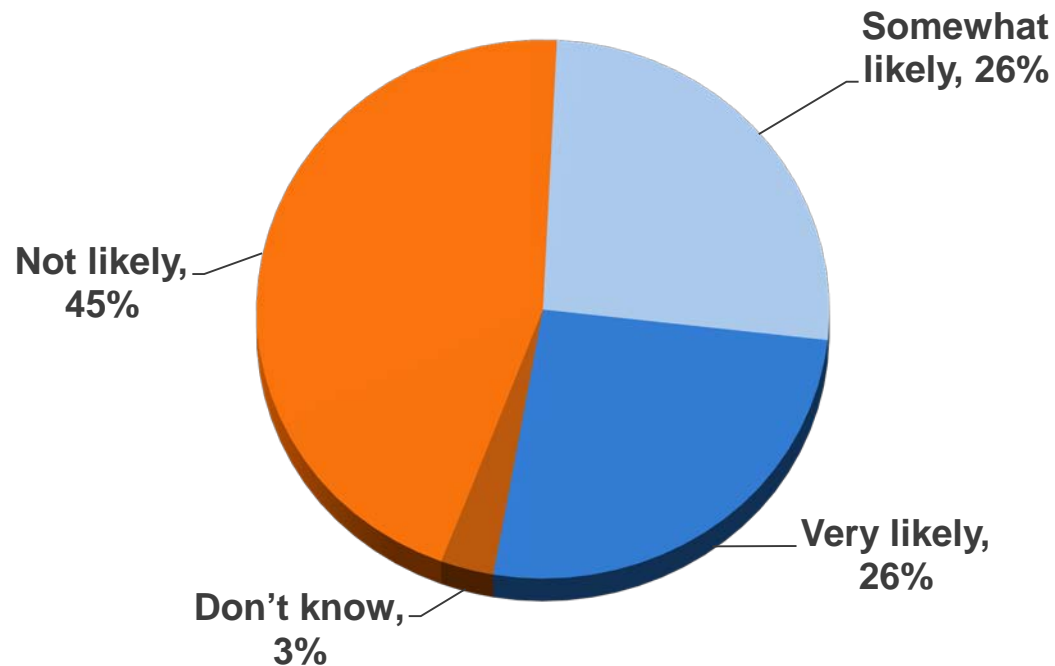
45-54 years – 44%

55+ years - 36%

Under 10 mi – 50%

10-19.9 mi – 51%

20+ mi – 56%



Q89 Next please tell me if your employer makes any of the following commute services or benefits available to you ...Work schedule with flexible start and end times

Q89d If you could receive \$3 per day for each day that you arrive at work before 7:00 am or at 10:00 am or later, how likely would you be to make this change in your work schedule?



Questions?

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