COMMUTER CONNECTIONS TDM EVALUATION PROJECT

2019 State of the Commute Survey Highlights

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Background

- Seventh triennial survey (2001, 2004, 2007, 10, 13, 2019)
- The State of the Commute Survey (SOC) vs. the Regional Travel Survey (RTS)
  - The SOC Survey analyzes commute trends and attitudes to evaluate the effectiveness of COG/TPB's commuter services programs
  - The RTS analyzes detailed household and person trips to develop COG/TPB's regional travel demand forecasting model
  - Both the SOC and the RTS are random sample surveys that use an address based sampling methodology
  - RTS captures all trips (both work and non-work trips)
  - SOC Survey focuses on commute trips and modes only

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Differences between RTS and SOC Surveys

	Regional Travel Survey (2017-2018)	State of the Commute Survey (2019)
Frequency	Every 10 years	Every 3 years
Duration	15 months	3 months
Sampling Frame	Households and individuals	Employed persons
Sample Size	15,976	Over 8,000 for 2019 and in 2016 it was 5,903
Recruitment	Mail using address based sampling	
Methodology	Internet with phone option	
Geographic Coverage	TPB Modeled Area	Non-Attainment Region
Primary Data of Interest	Detailed trips and typical weekday travel	Commute patterns and commuter opinions

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SOC Survey Methodology

- 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
- 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
- Survey designed and administered through LDA Consulting, CIC Research, ESTC, and CUTR

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SOC 2019 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

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COMMUTE PATTERNS

- *Commute Modes and Trips*
- *HOV and Express Lanes*

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Weekly Commute Trips

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

By Mode:

Transit

16.6% Metrorail; 1.6% Commuter Rail

Carpool/Vanpool

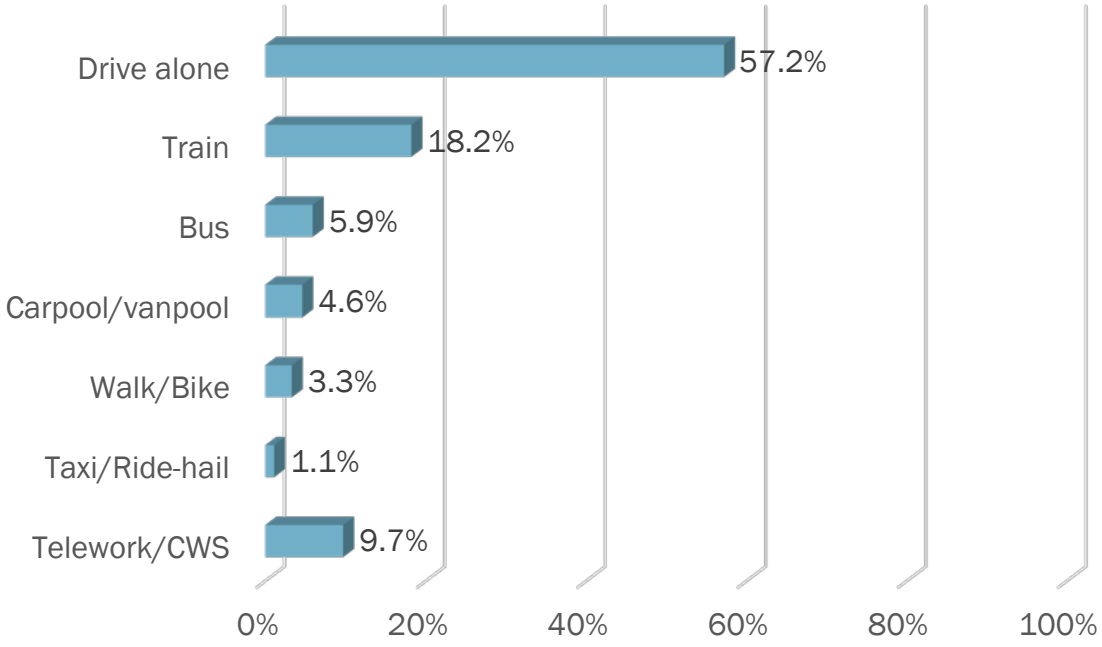
3.4% Formal; 1.0% Slug; 0.2% Vanpool

Walk/Bike/Scooter

1.7% Walk; 1.5% Bike; 0.1% scooter

Ride Hail/Taxi

1.0% Ride-hail; 0.1% Taxi



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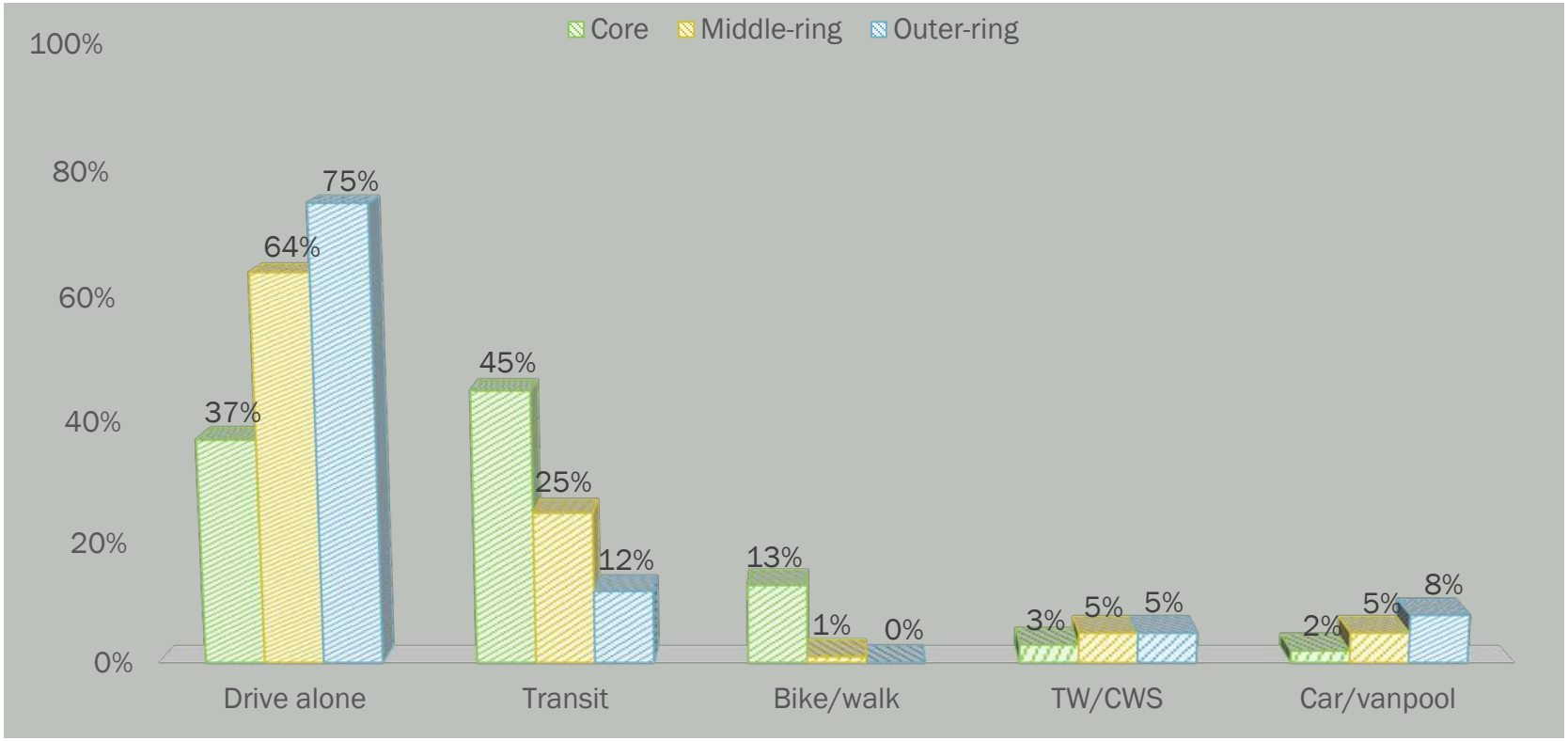
Weekly Commute Trips

Drive alone rates were much lower for both residents and workers in the "Inner Core" area *(DC, Arlington, Alexandria)* than for Middle Ring *(Fairfax, Montgomery, Prince George's)*and Outer Ring *(Calvert, Charles, Frederick Loudoun, Prince William)* respondents



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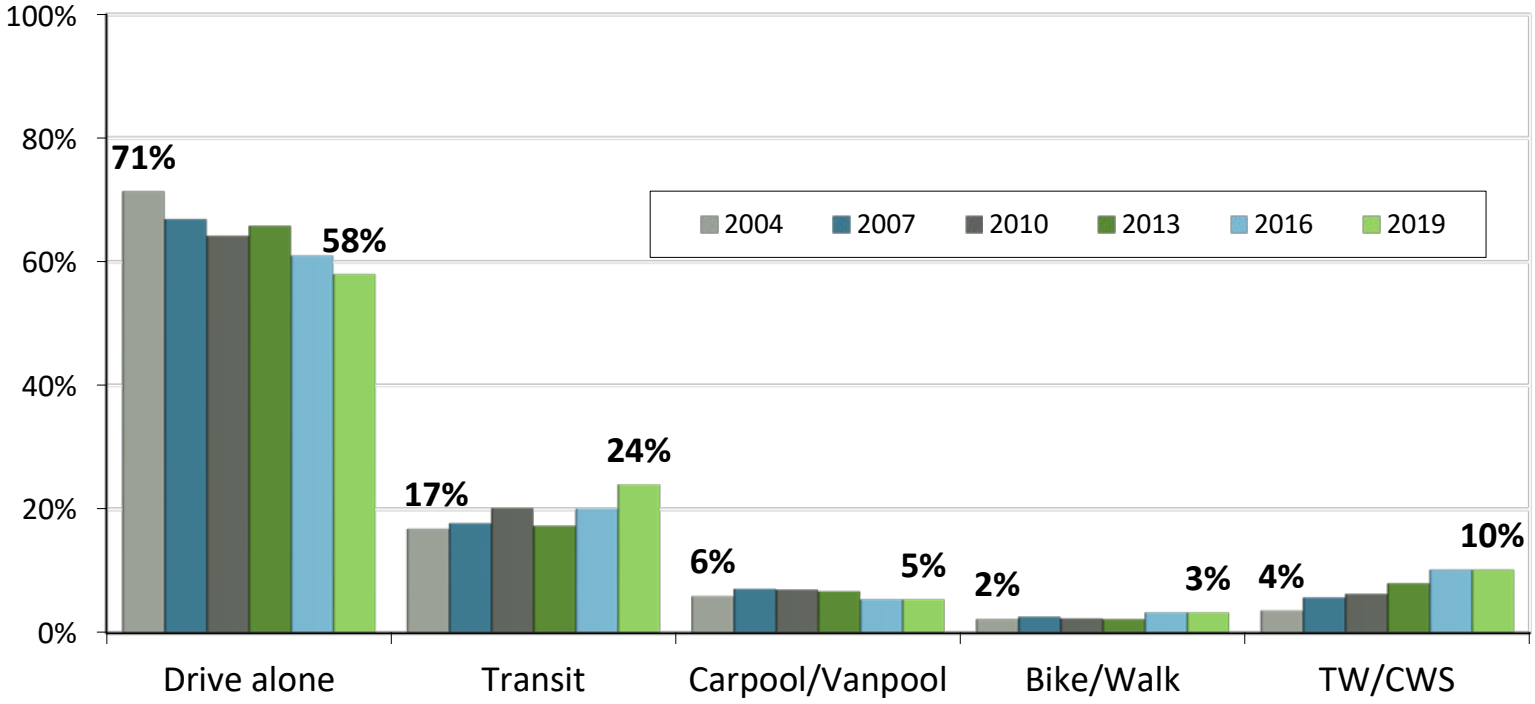
Weekly Commute Trips by Mode Trend

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

Telework and transit use increased; other modes remained steady



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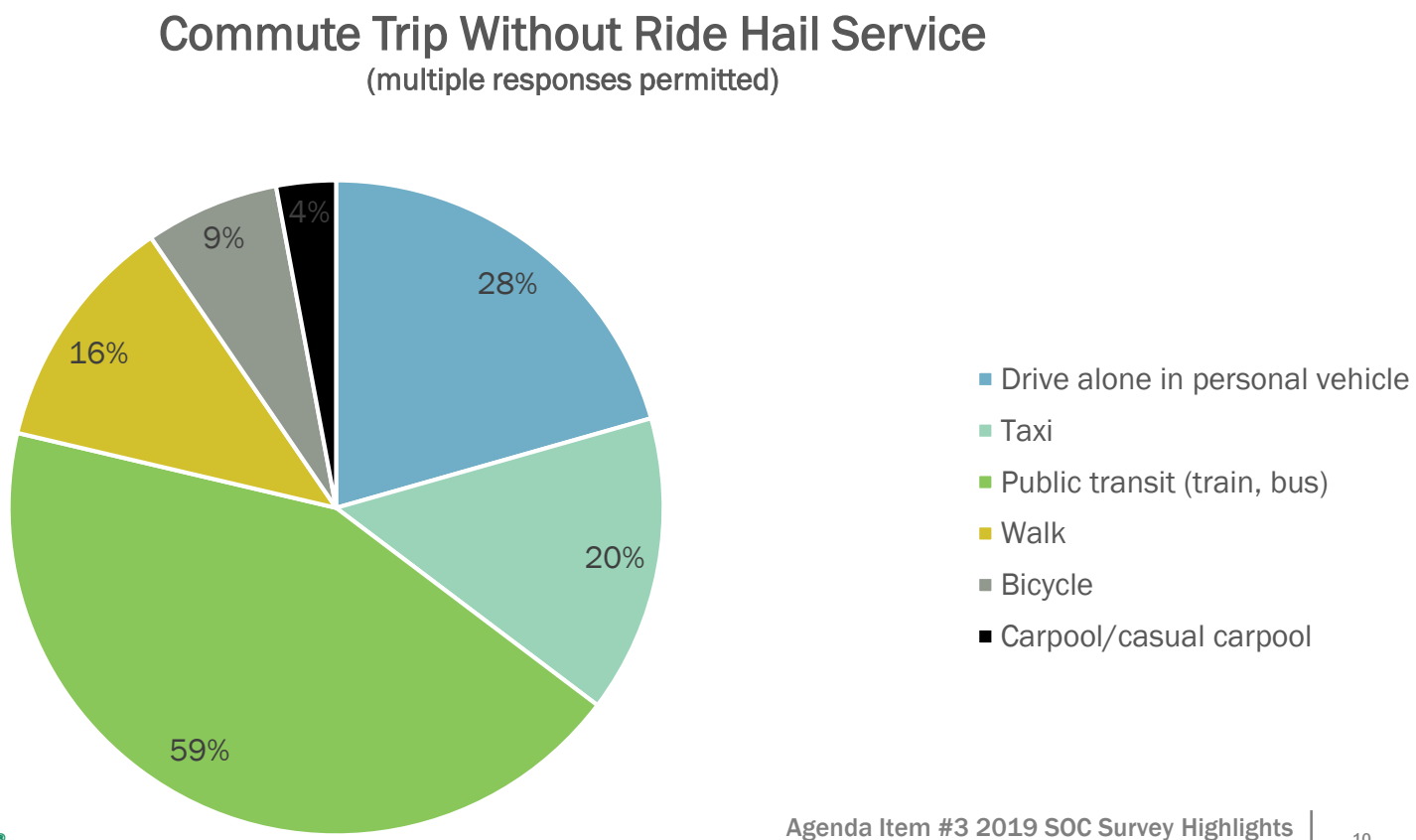
Ride-Hailing Trips

59% of commute trips would have been made by transit

Half of these commuters said they would have driven in a personal vehicle (28%) or ridden in a taxi (20%)



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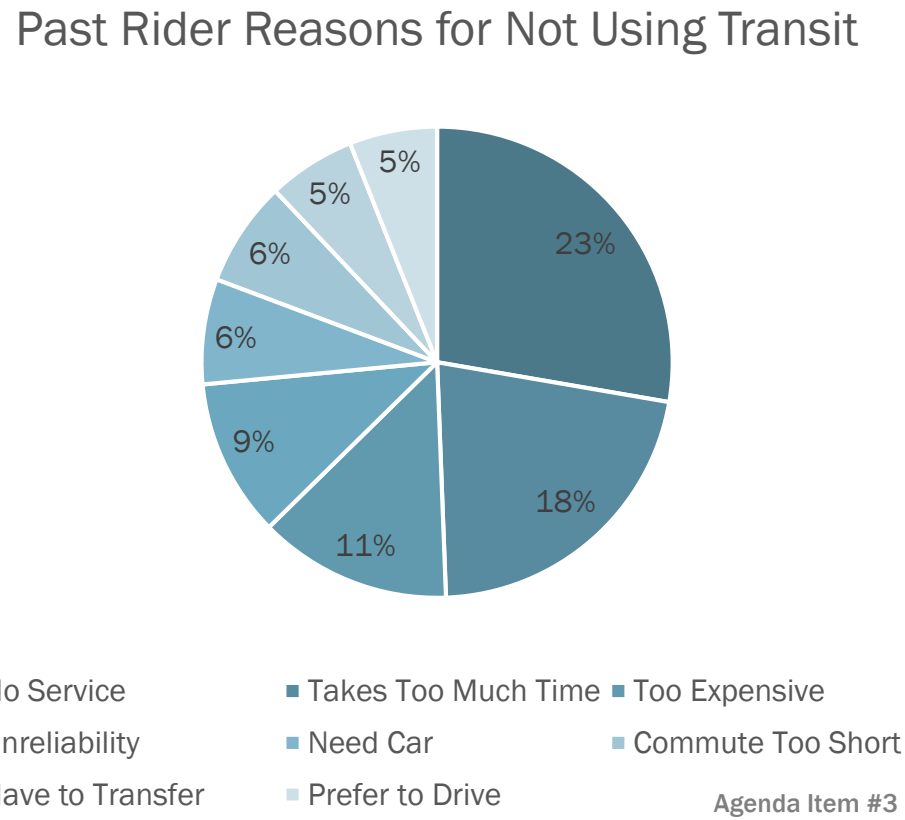
Past Transit Riders

(23%) of past rider respondents said they don't use transit because they had moved either their home or work location and had no transit service available. Travel time (18%), the cost of transit (11%) and the unreliability of transit (9%) were other reasons not to use transit for past riders.



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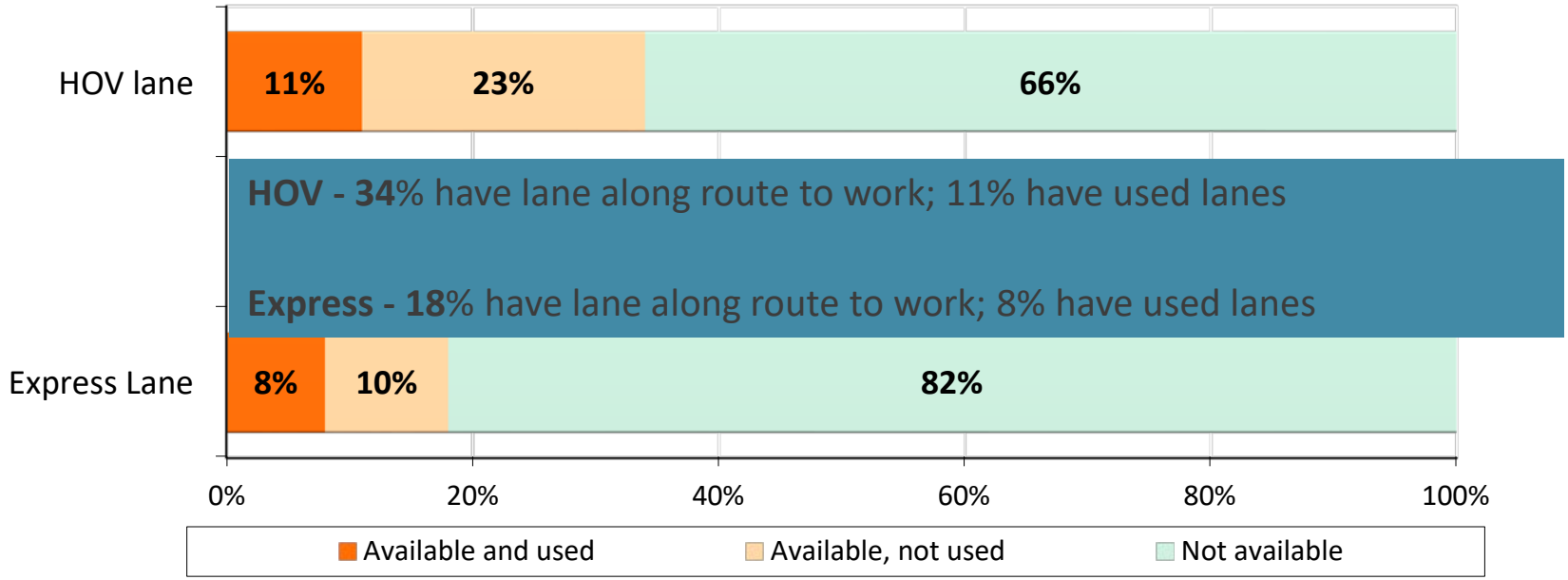
HOV and Express Lanes

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



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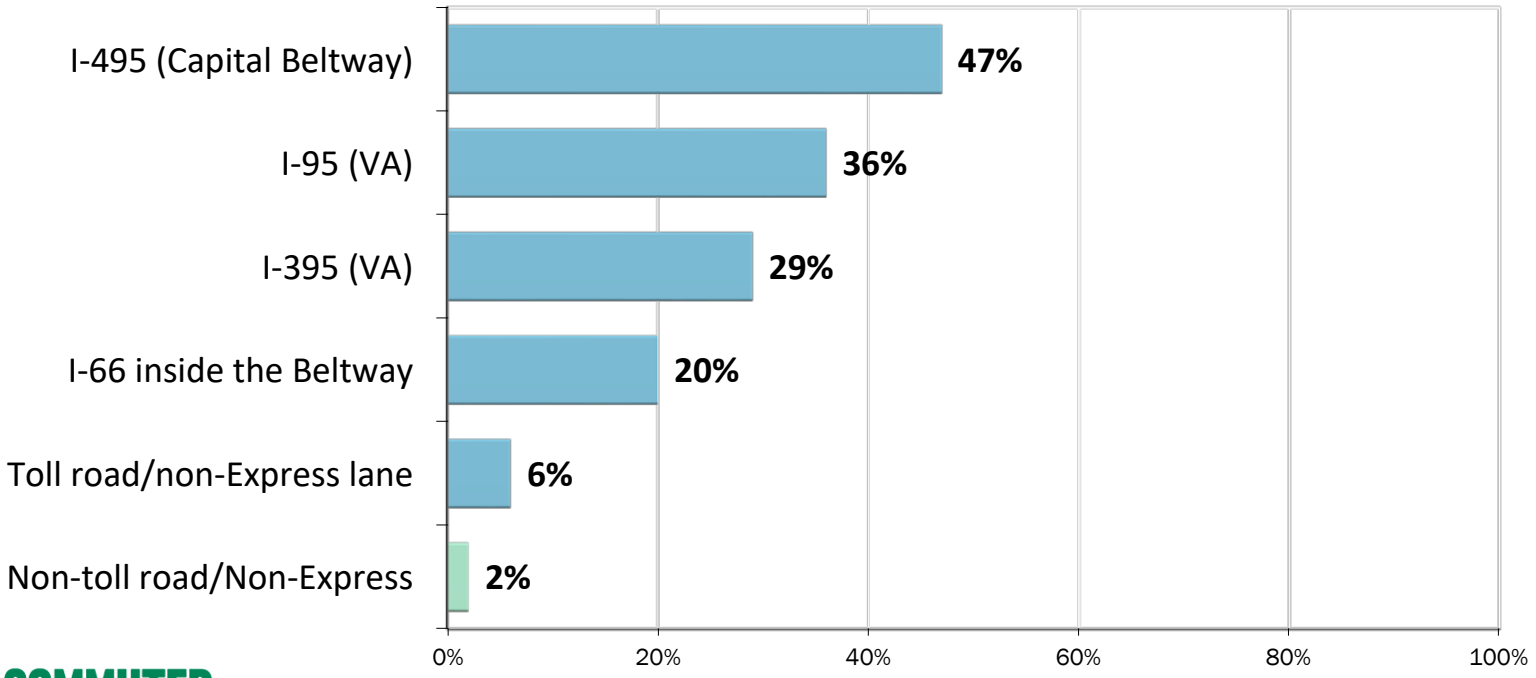
Express Lanes Use

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



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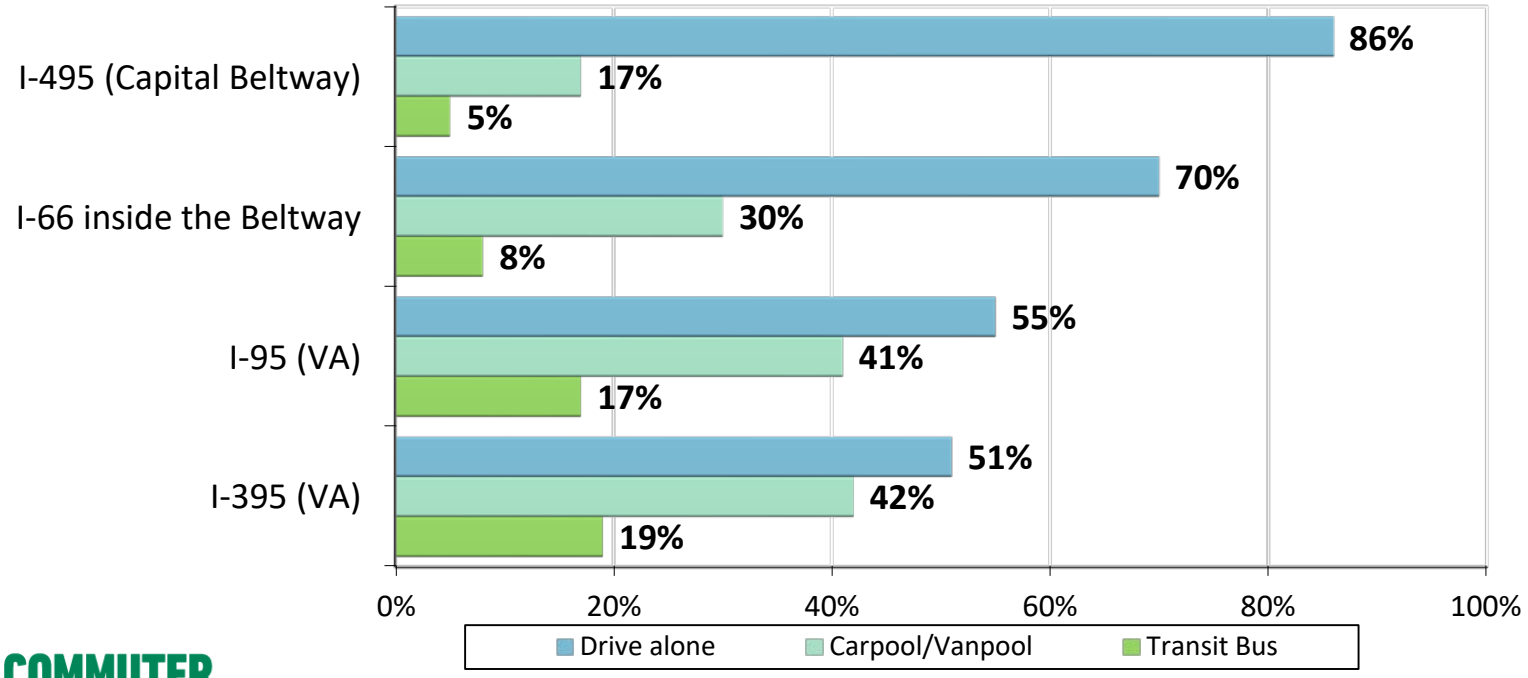
Express Lanes Mode Use

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 inside the Beltway (70%)

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



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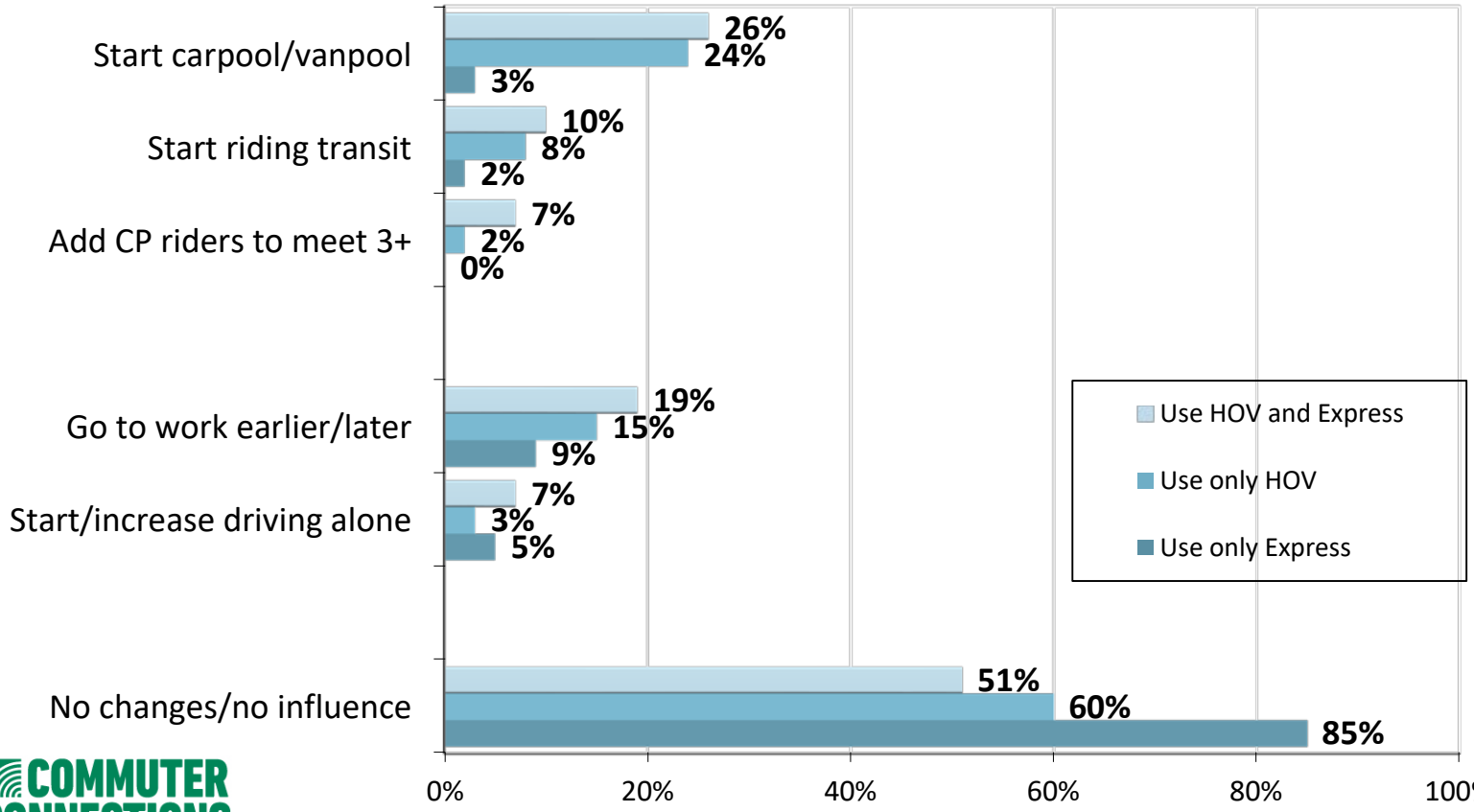
HOV and Express Lanes Mode Shifts

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



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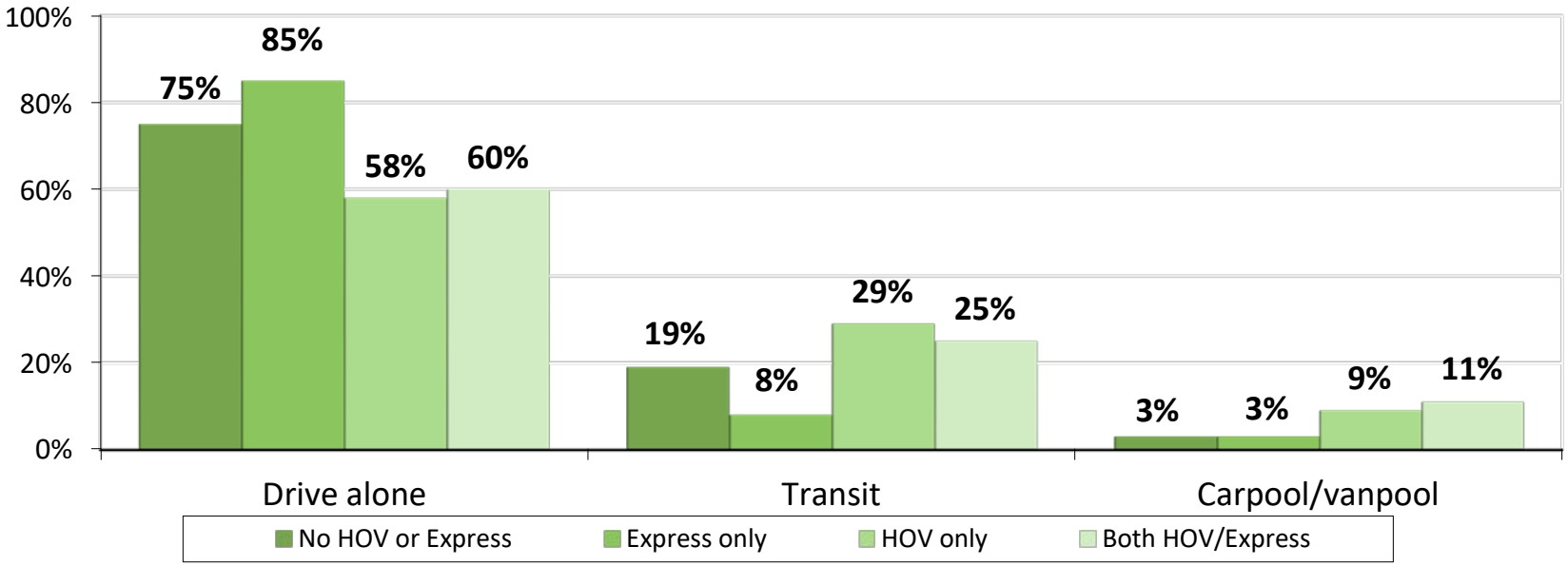
HOV and Express Lanes Alternative Mode Use

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%)



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Vehicle Access

The trend away from vehicle ownership among young residents might be reversing. 40% of young respondents who lived in the Inner Core reported having a vehicle for each adult household member, vs. 32% in 2016.

Middle Ring was 58% in 2016 to 67% in 2019 and Outer Ring was 73% in 2016 to 83% in 2019

Home Area and Age		1+ Car Available 2016 SOC	1+ Car Available 2019 SOC	Change (2016-2019)
Inner Core	**Under 35 years** (2016 n = 212, 2019 n = 778)	32%	40%	+ 8%
	35 to 54 years (2016 n = 749, 2019 n = 908)	51%	56%	+ 5%
	55 years and older (2016 n = 618, 2019 n = 476)	57%	63%	+ 6%
Middle Ring	**Under 35 years** (2016 n = 218, 2019 n = 417)	58%	67%	+ 9%
	35 to 54 years (2016 n = 719, 2019 n = 1,065)	69%	75%	+ 6%
	55 years and older (2016 n = 643, 2019 n = 875)	73%	76%	+ 3%
Outer Ring	**Under 35 years** (2016 n = 272, 2019 n = 483)	73%	83%	+ 10%
	35 to 54 years (2016 n = 1,285, 2019 n = 1,746)	81%	87%	+ 6%
	55 years and older (2016 n = 907, 2019 n = 1,163)	81%	88%	+ 7%

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COMMUTE EASE & SATISFACTION

- *Commute Satisfaction (by geographic area and mode)*
- *Ease of Commute*

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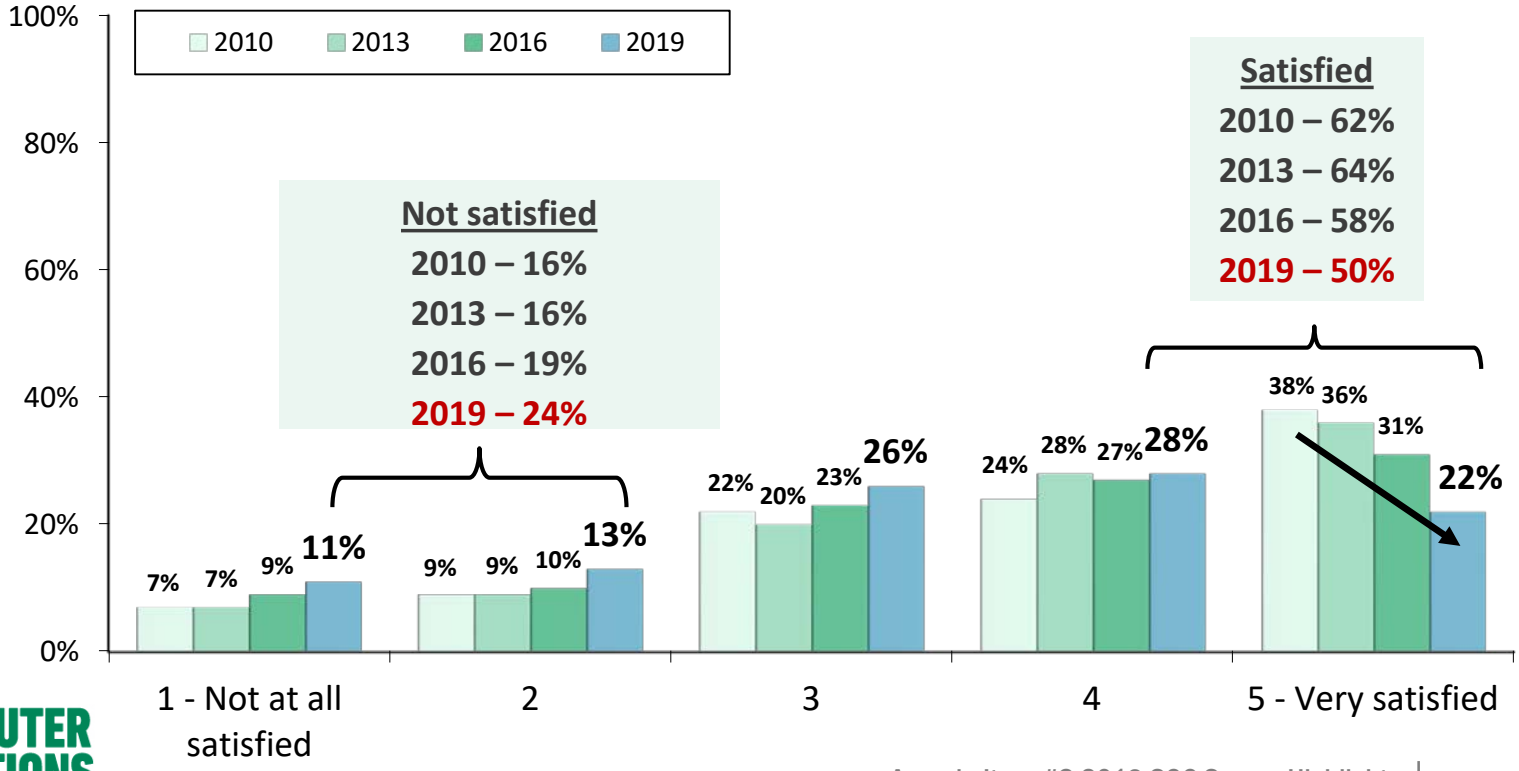
Satisfaction by Location & Time

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%



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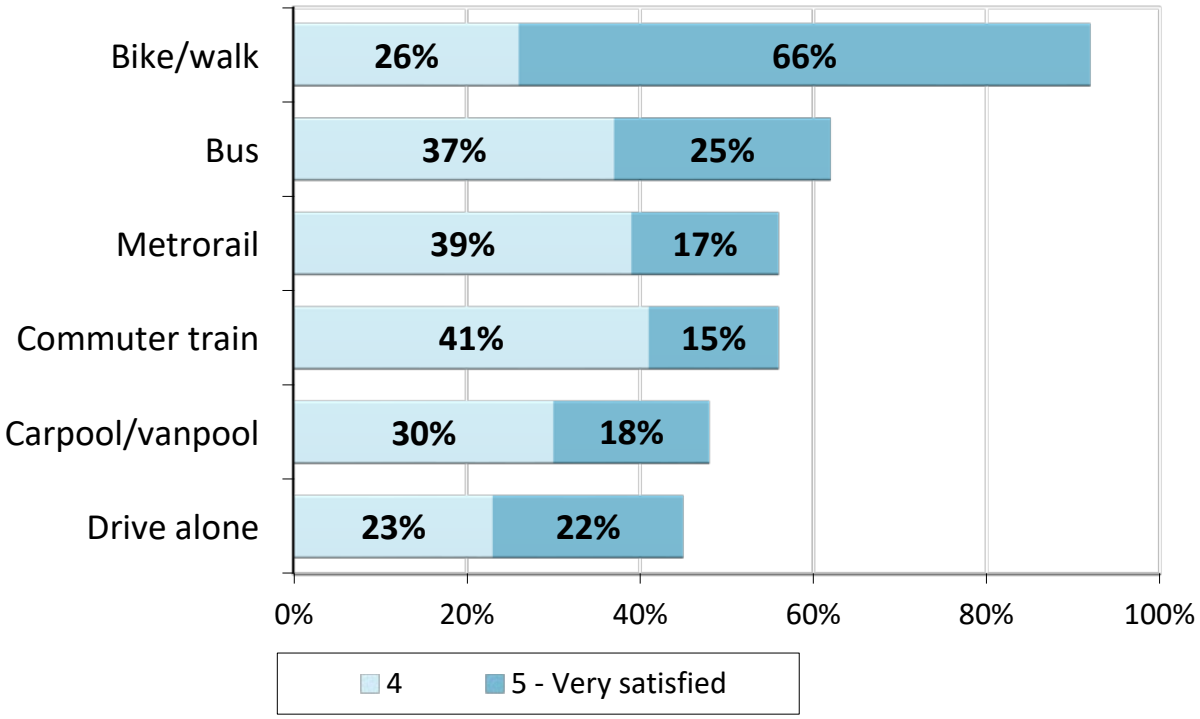
Satisfaction by Mode

Bikers/Walkers Were Most Satisfied; CP/VP & DA 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



	2013	2016	2019
Bike/walk	93%	97%	92%
Bus	65%	66%	62%
Metrorail	67%	48%	56%
Commuter train	90%	70%	56%
Carpool/vanpool	67%	66%	48%
Drive alone	51%	57%	45%

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Commute Ease

28% had a More Difficult Commute than a Year Ago- Higher than 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

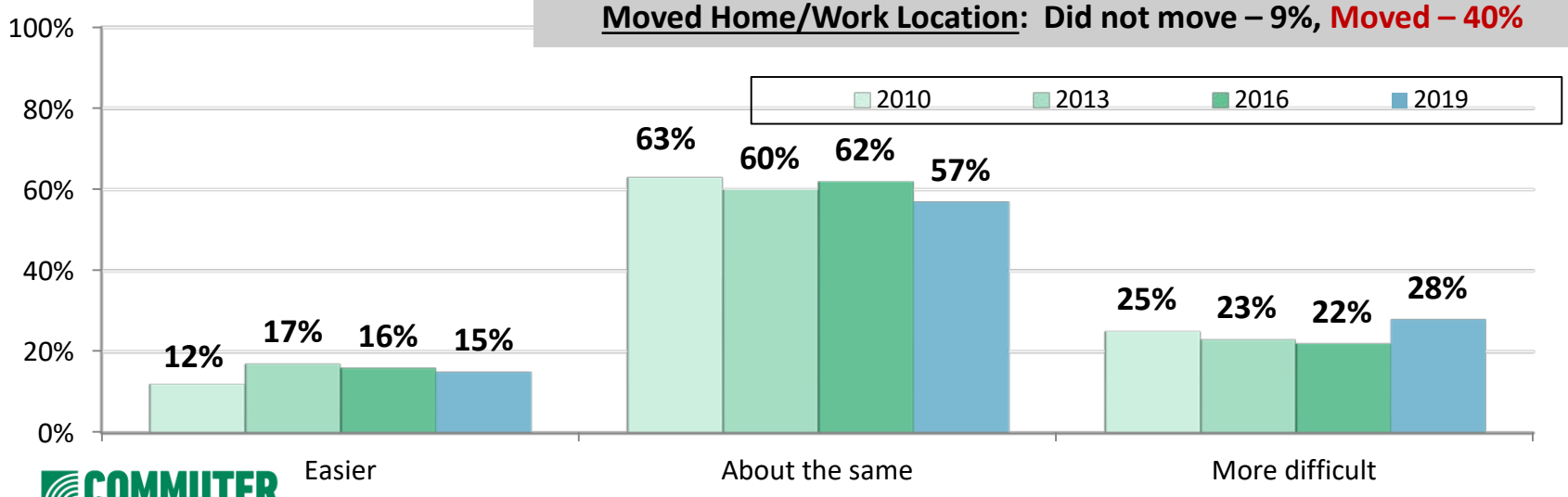
More Difficult Commute

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%



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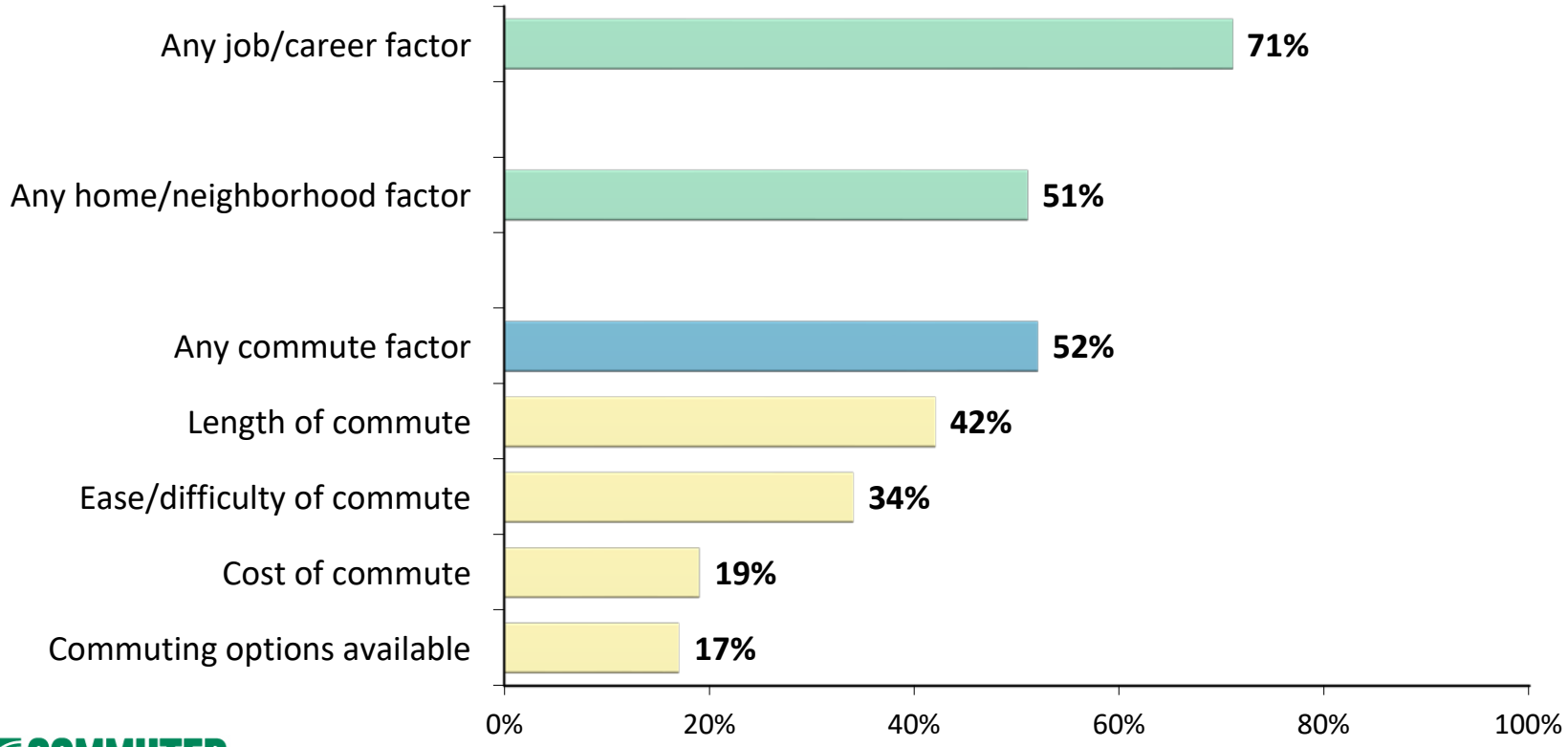
Commute Ease Importance

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

34% said commute ease was more important than other factors in the decision



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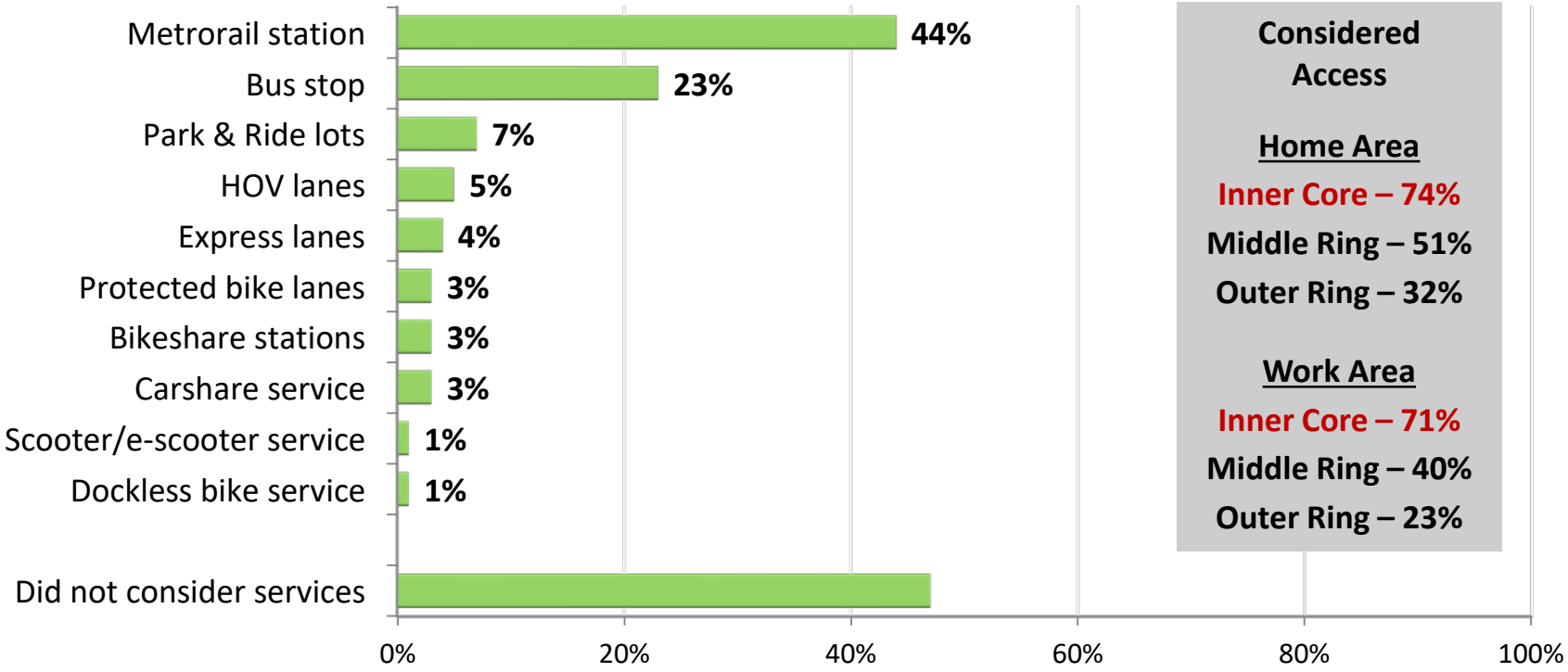
Modes Considered as Part of Moving

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



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Teleworking

- *Number of Teleworkers*
- *Telework Frequency*
- *Potential Teleworkers*
- *Teleworkers By Employer Type*
- *Telework Arrangements*

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Number of Teleworkers

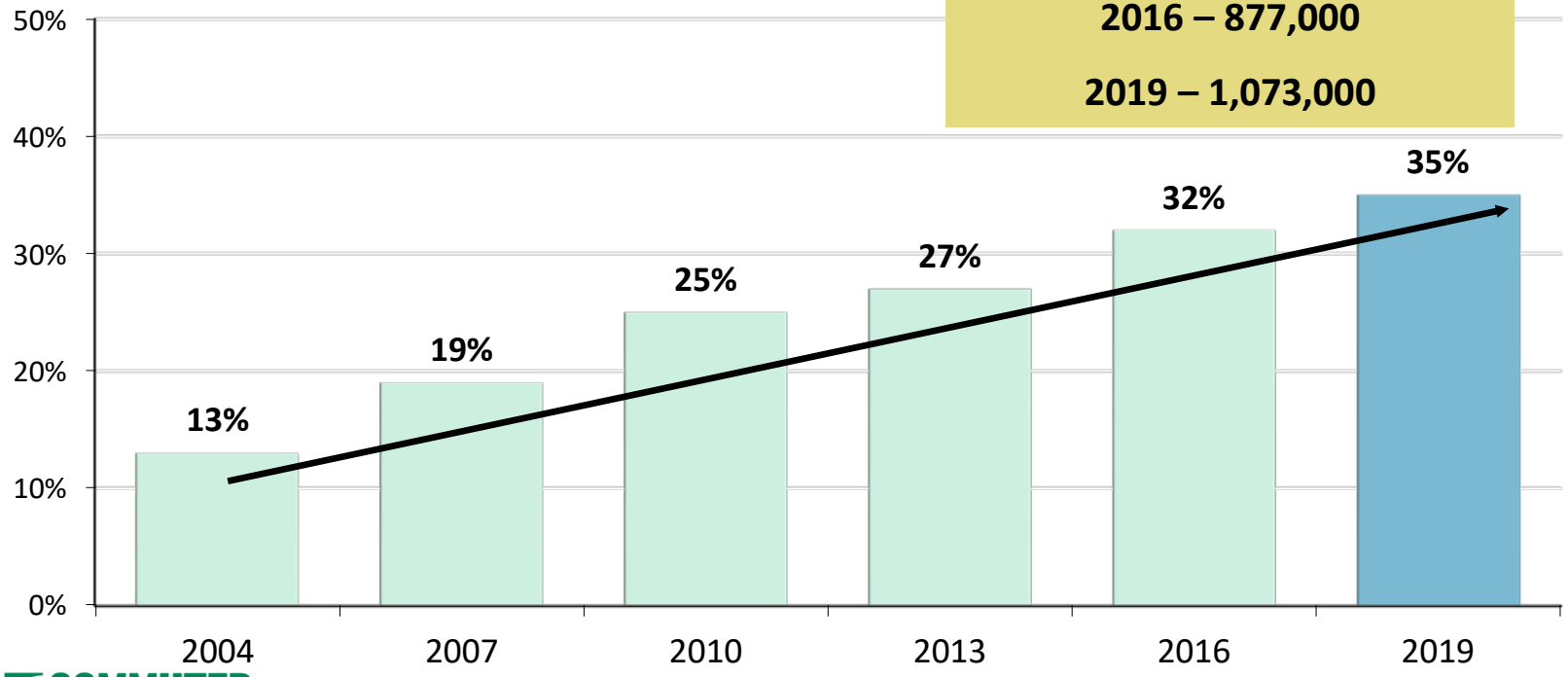
Telework Has Nearly Tripled Since 2004 – 35% of Regional Commuters Teleworked at Least Occasionally in 2019

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

Regional Teleworkers:

2016 – 877,000

2019 – 1,073,000



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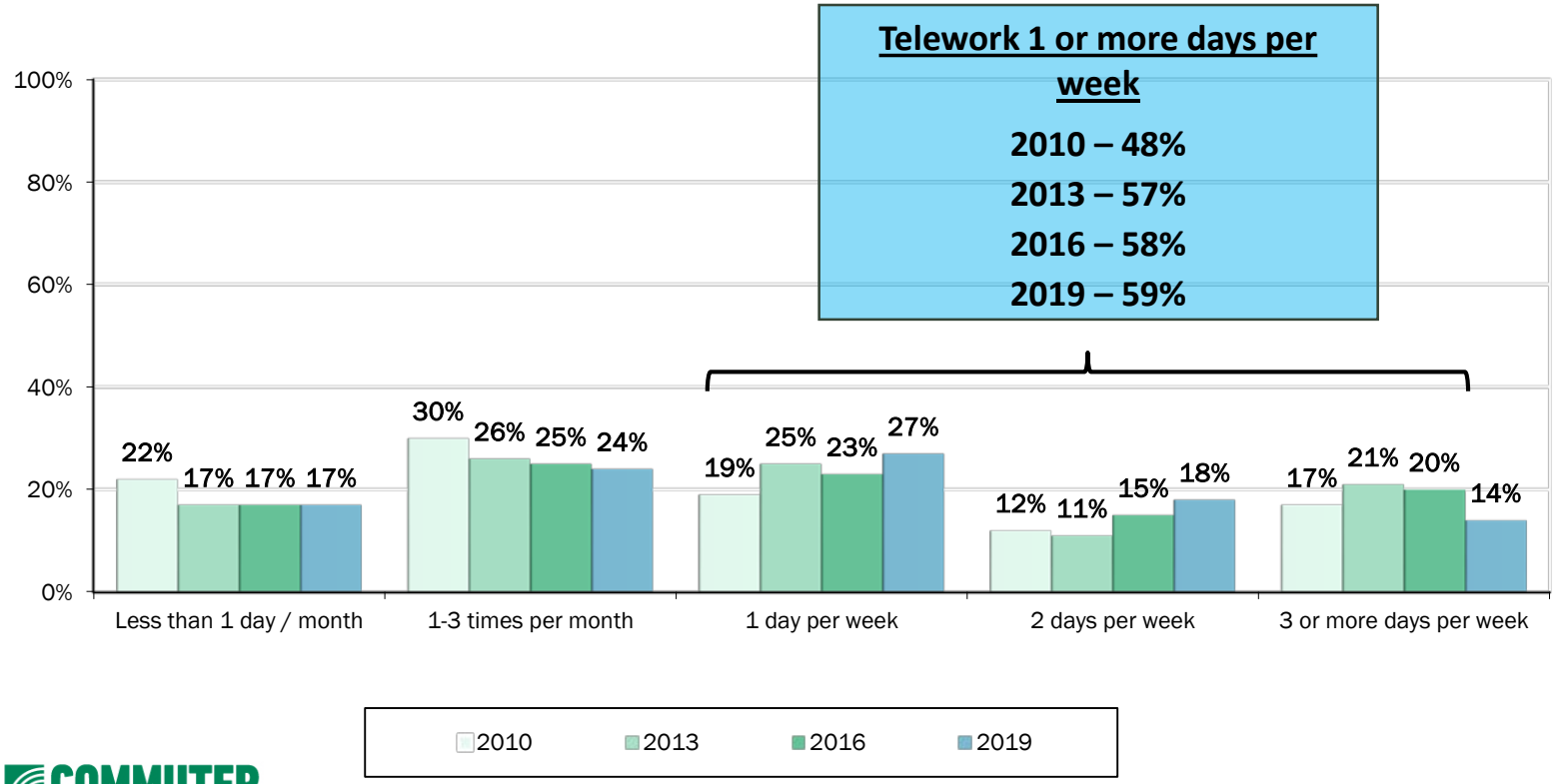
Telework Frequency

Nearly six in ten (59%) said they teleworked at least one day per week.

On average, teleworkers used this arrangement about 1.20 days per week.



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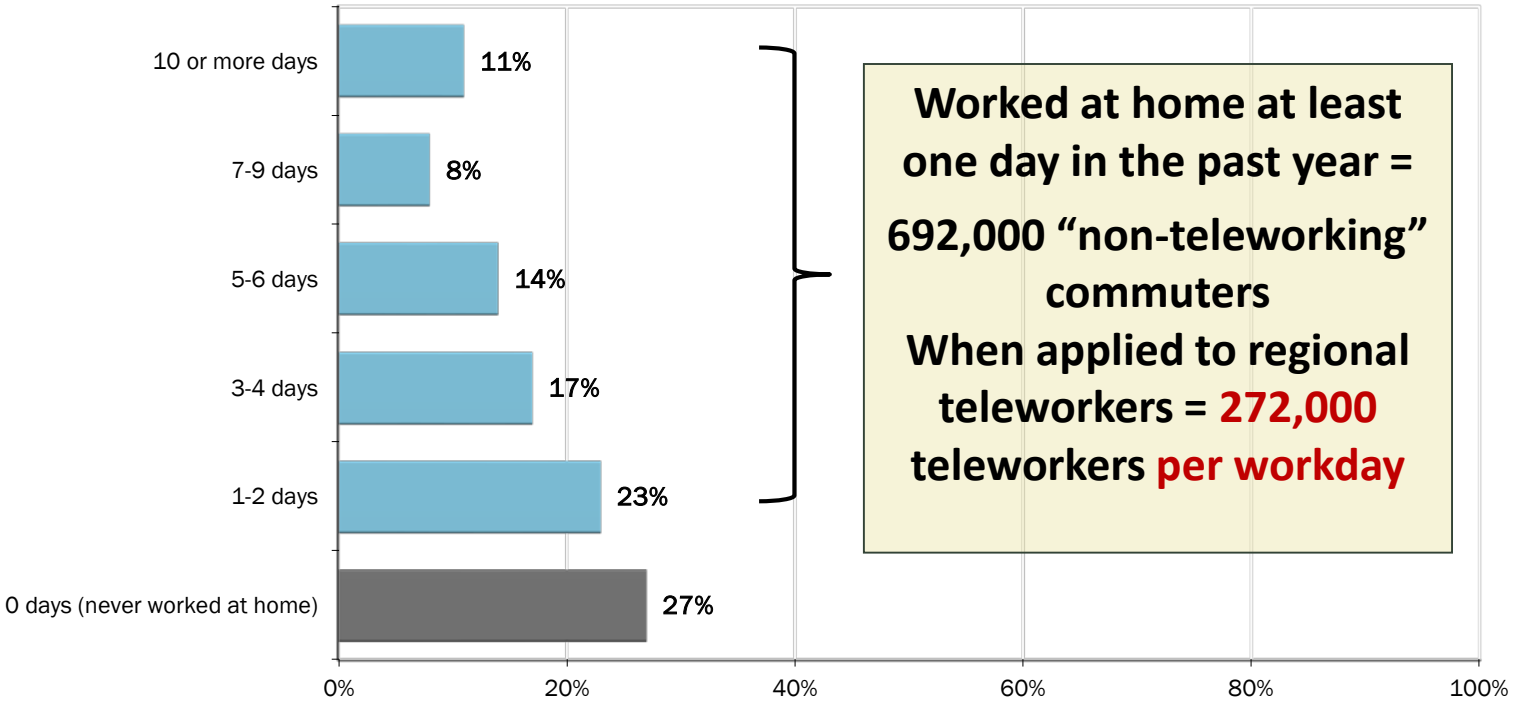
TW Frequency of "Non-Teleworkers"

73% of Respondents who said they were not "teleworkers" but had telework-appropriate jobs worked at home at least once in past year

This represented 22% of all commuters regionwide.



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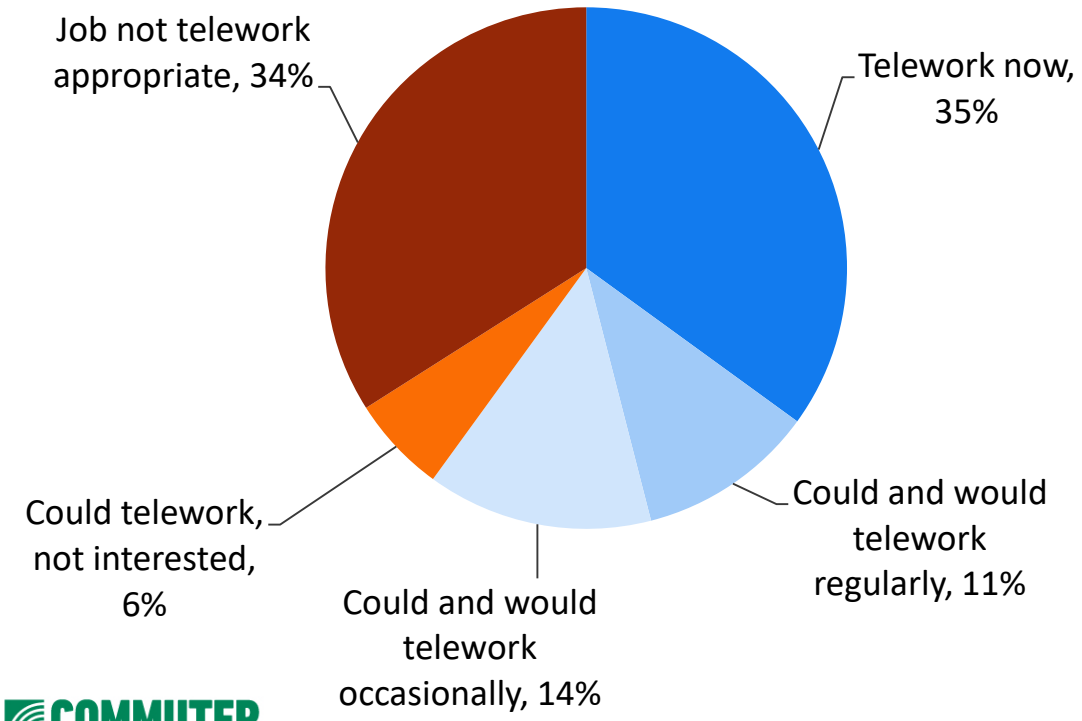
Telework Potential

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"



1,073,000 current teleworkers

771,000 "could and would" telework

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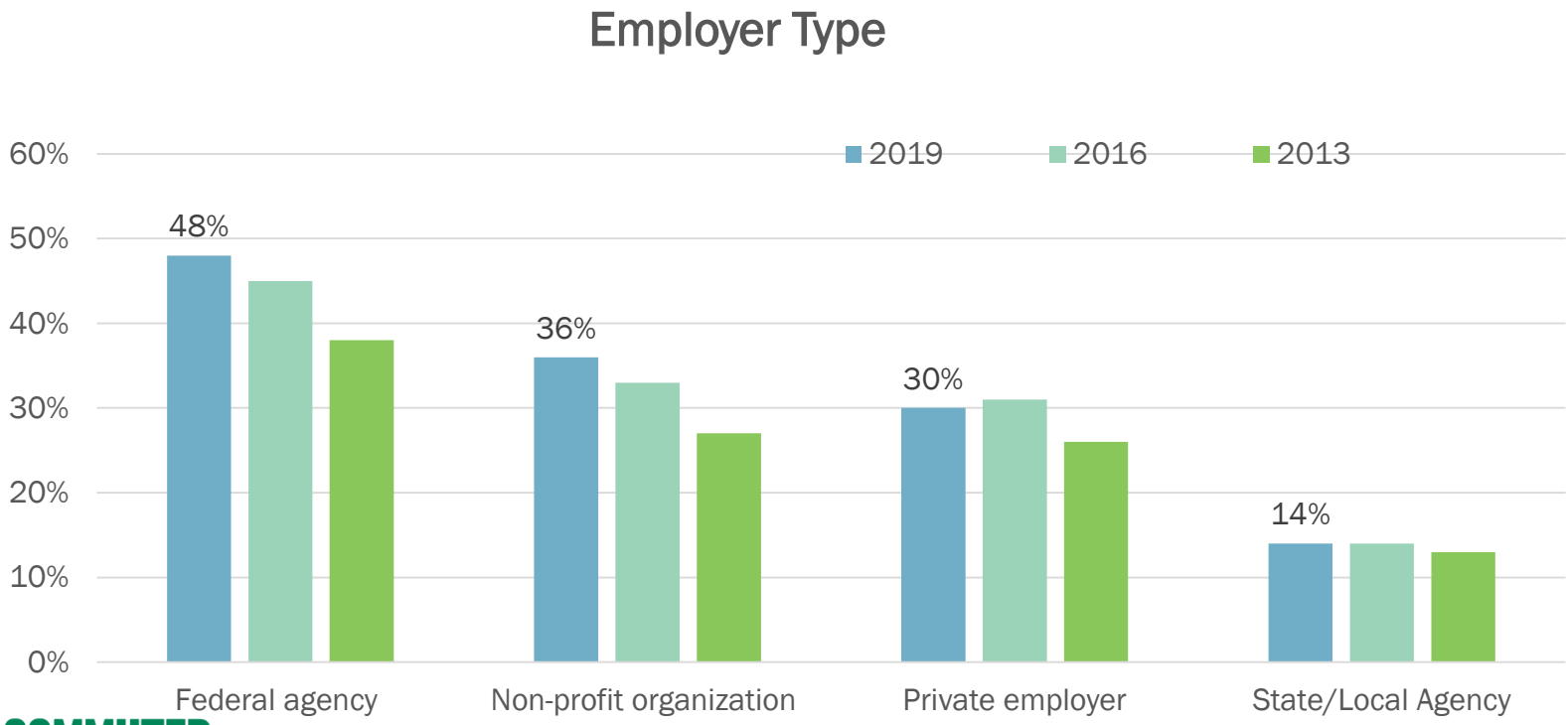
Teleworker Employer Type

Federal agency employees teleworked at a much higher rate (48%) than the regional average

And much higher than did employees who worked for non-profit organizations (36%), private employers (30%), and state/local agencies (14%).



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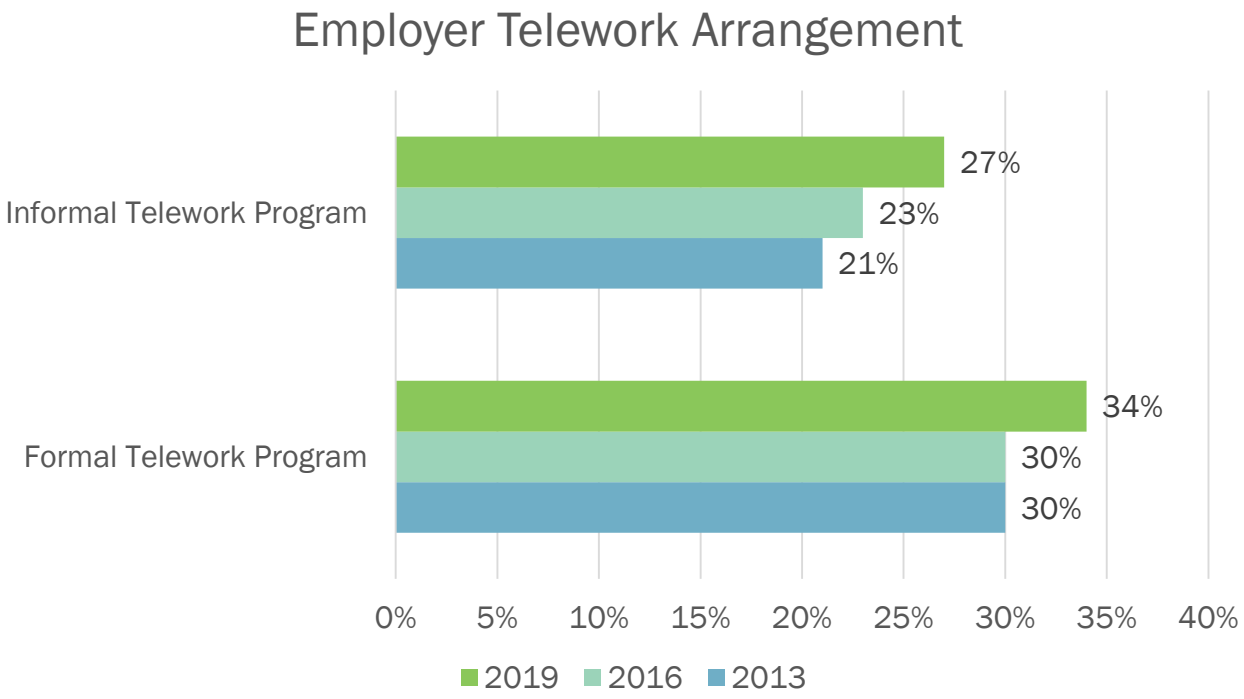
Teleworker Arrangements

More than six in ten (61%) of all respondents said their employers allowed some telework, either under a formal program (34%) or an informal arrangement (27%)



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Marketing Awareness and Employer Services

- *Regional Commute Advertising/Brand Awareness*
- *Advertising Effectiveness*
- *Commute Services Offered and Used at the Workplace*

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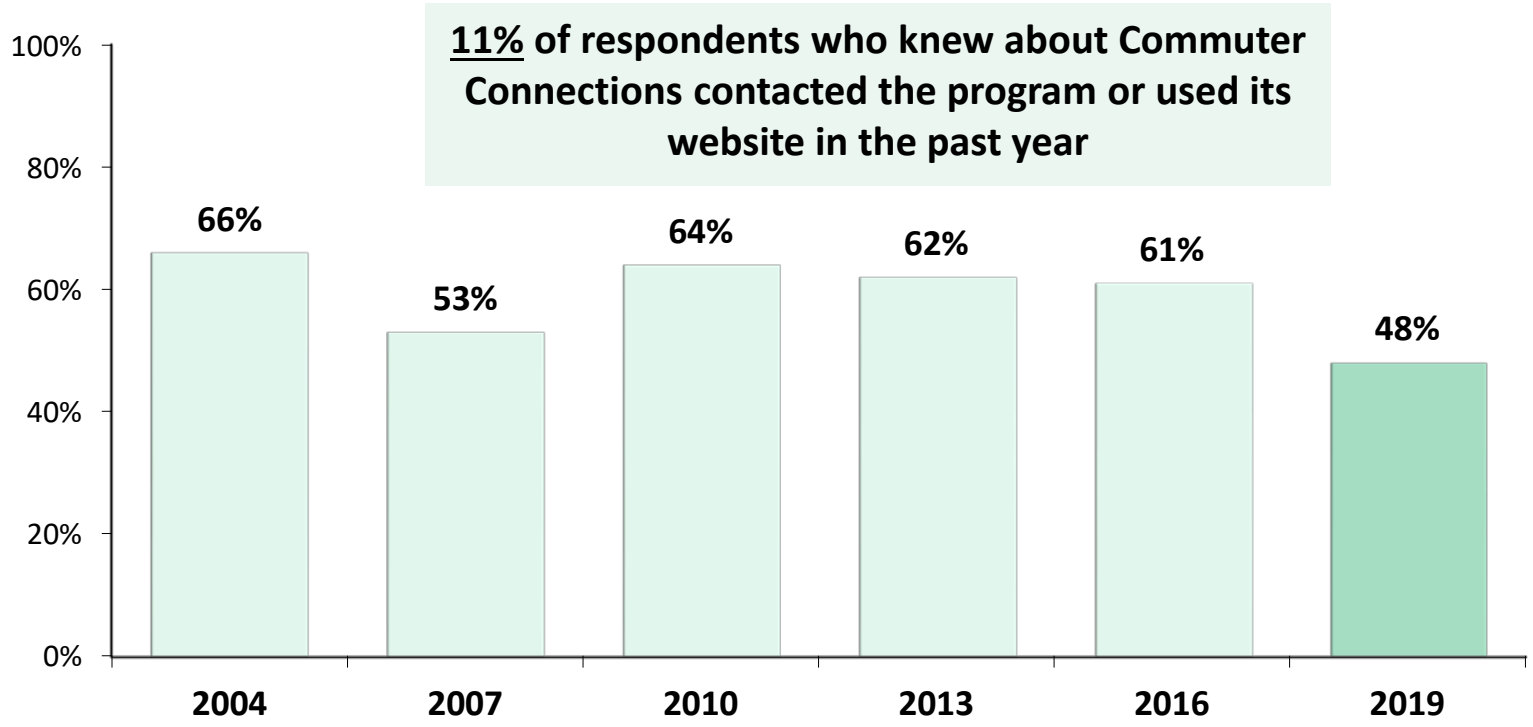
Brand Awareness

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



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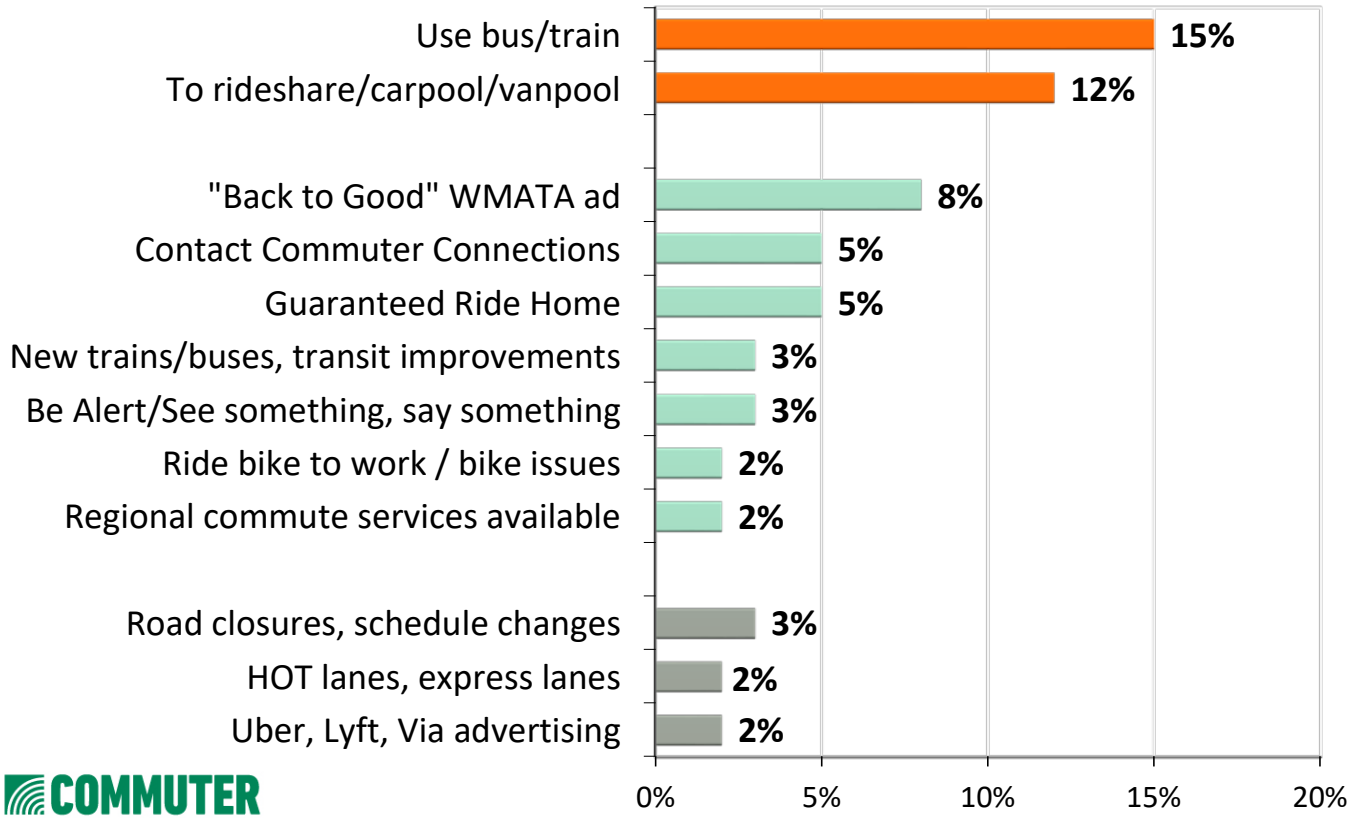
Ad Recall

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



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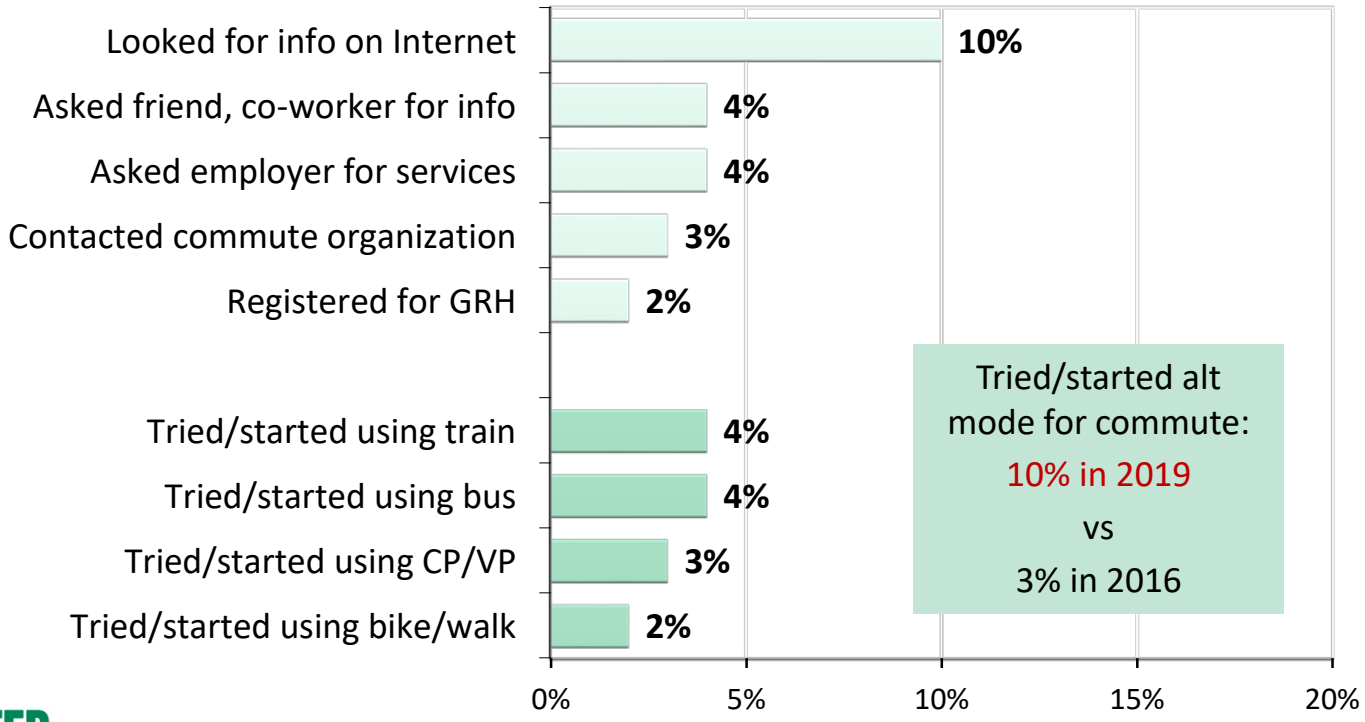
Actions Taken After Seeing/Hearing Ad

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



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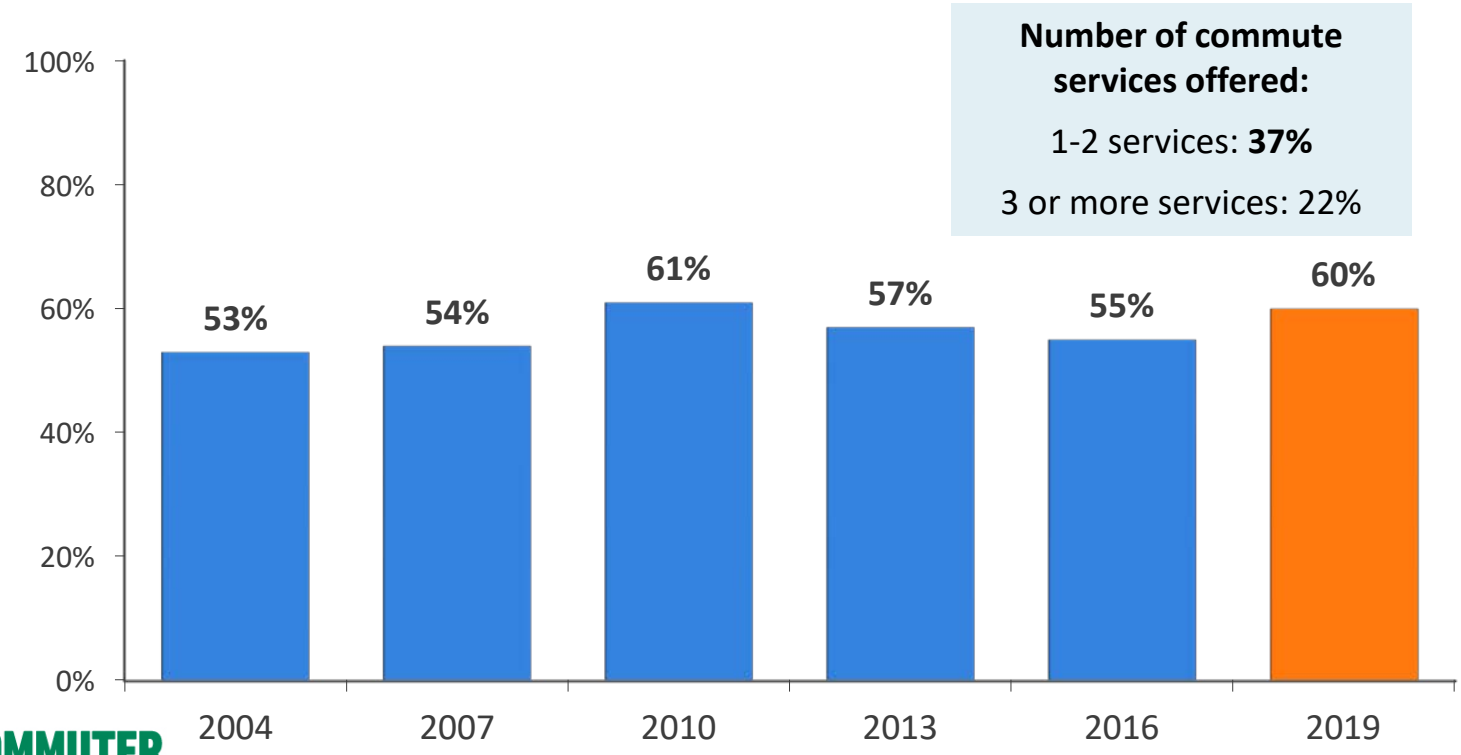
Employer Commute Services Offered

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



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Type of Employer Commute Services

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

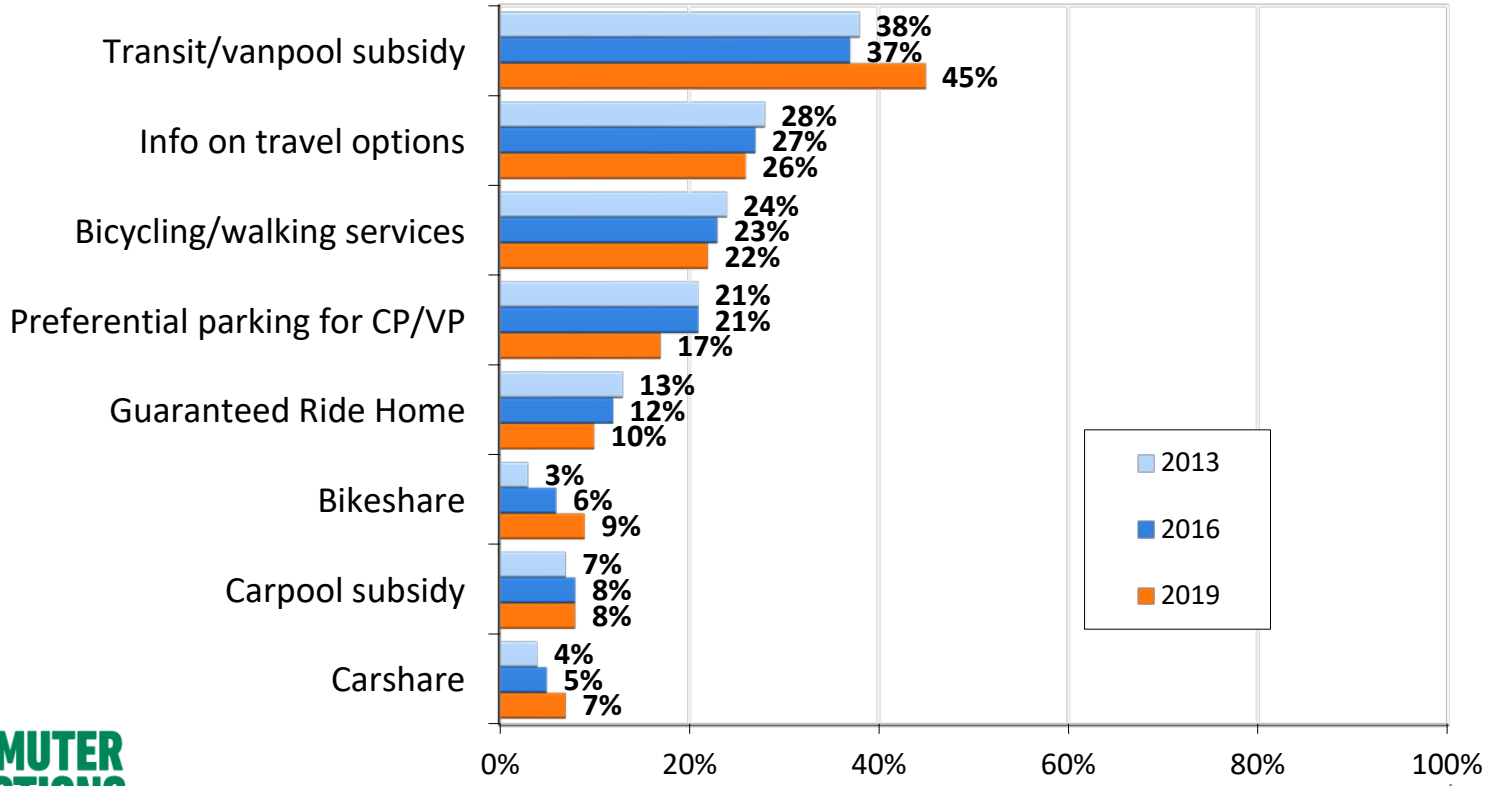
Transit/Vanpool Subsidies

31% Pre-tax deduction (employee-paid)

26% Direct cash payment (employer-paid)

10% SmarTrip card or voucher

33% Unknown



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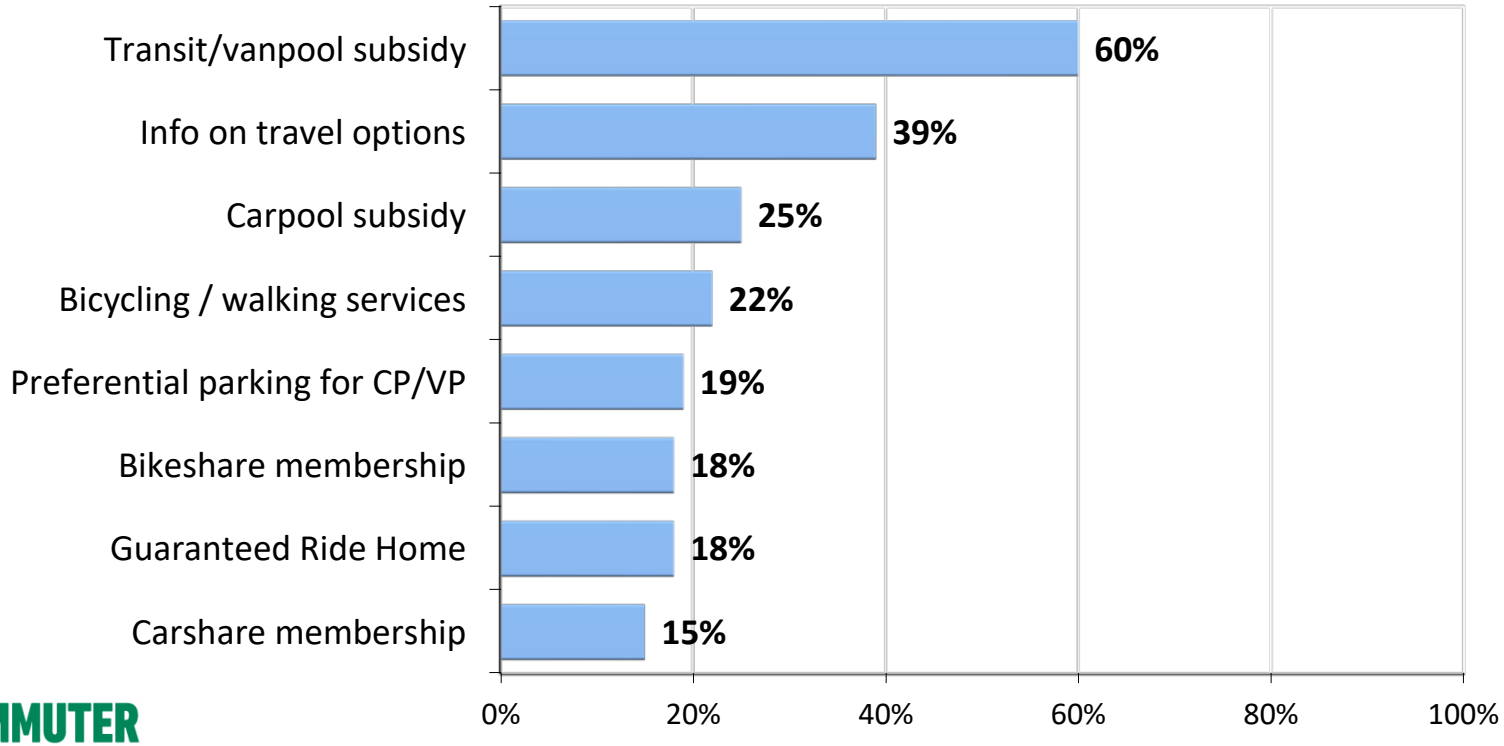
Use of Employer Commute Services

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



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Technology Initiatives and Driverless Cars

- *Social Networking Applications*
- *Travel Trip Applications*
- *Driverless Cars*

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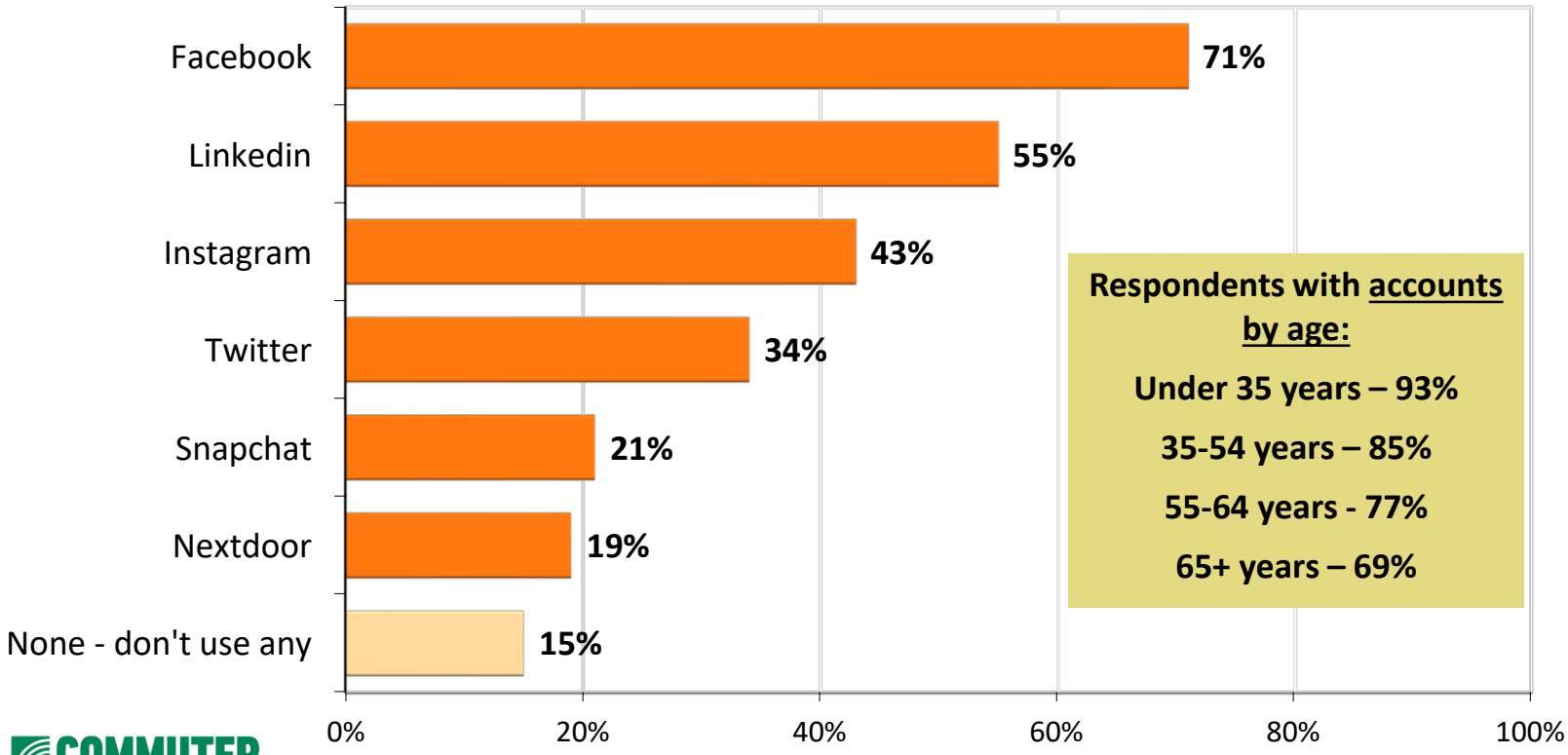
Social Network Applications

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

Use of accounts declined with increasing age



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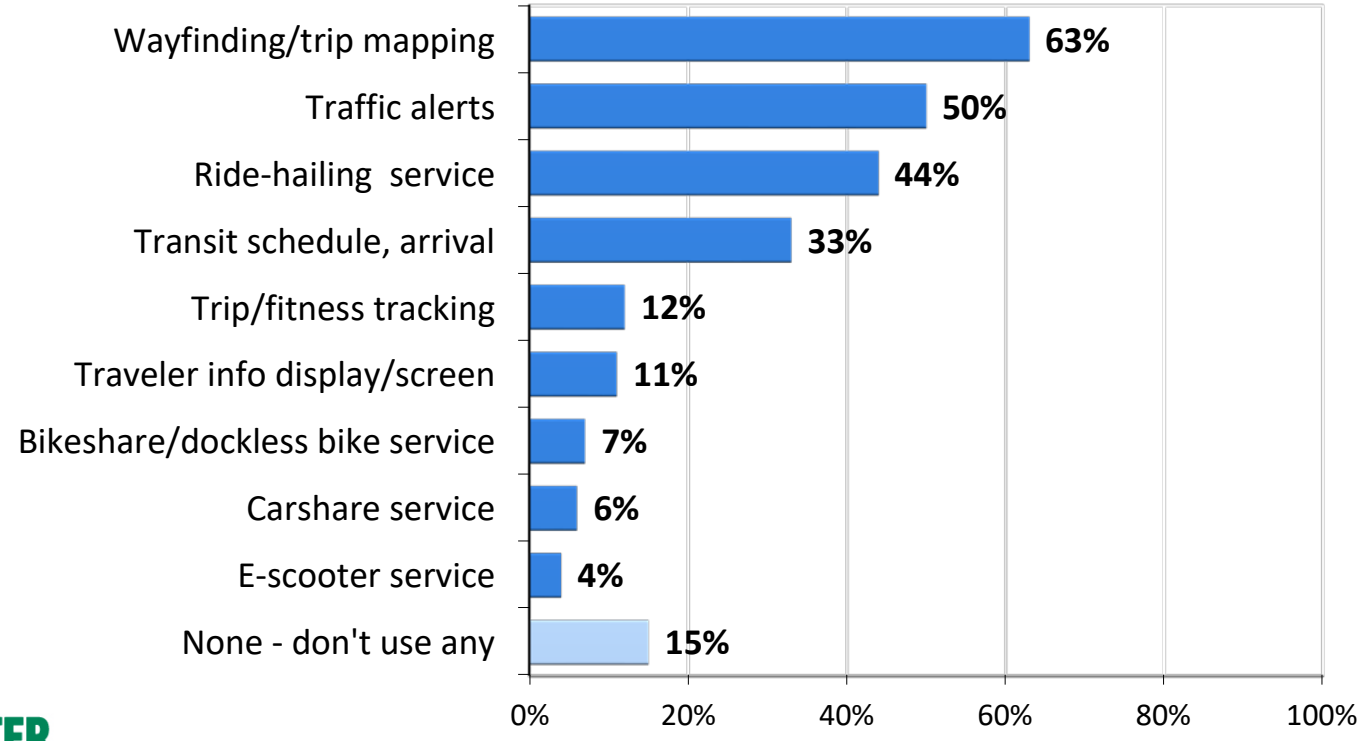
Travel Trip Applications

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%



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Driverless Cars

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

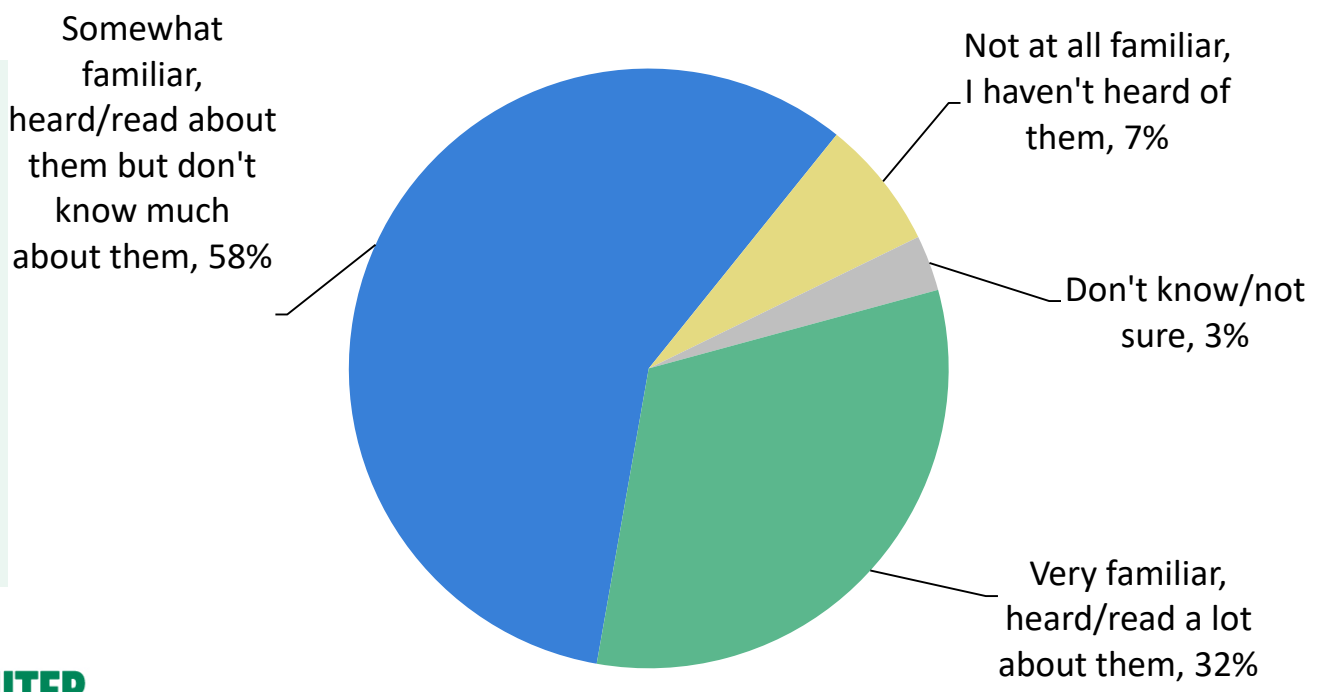
Familiarity was higher among males and higher income respondents; there was very little difference by age

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%



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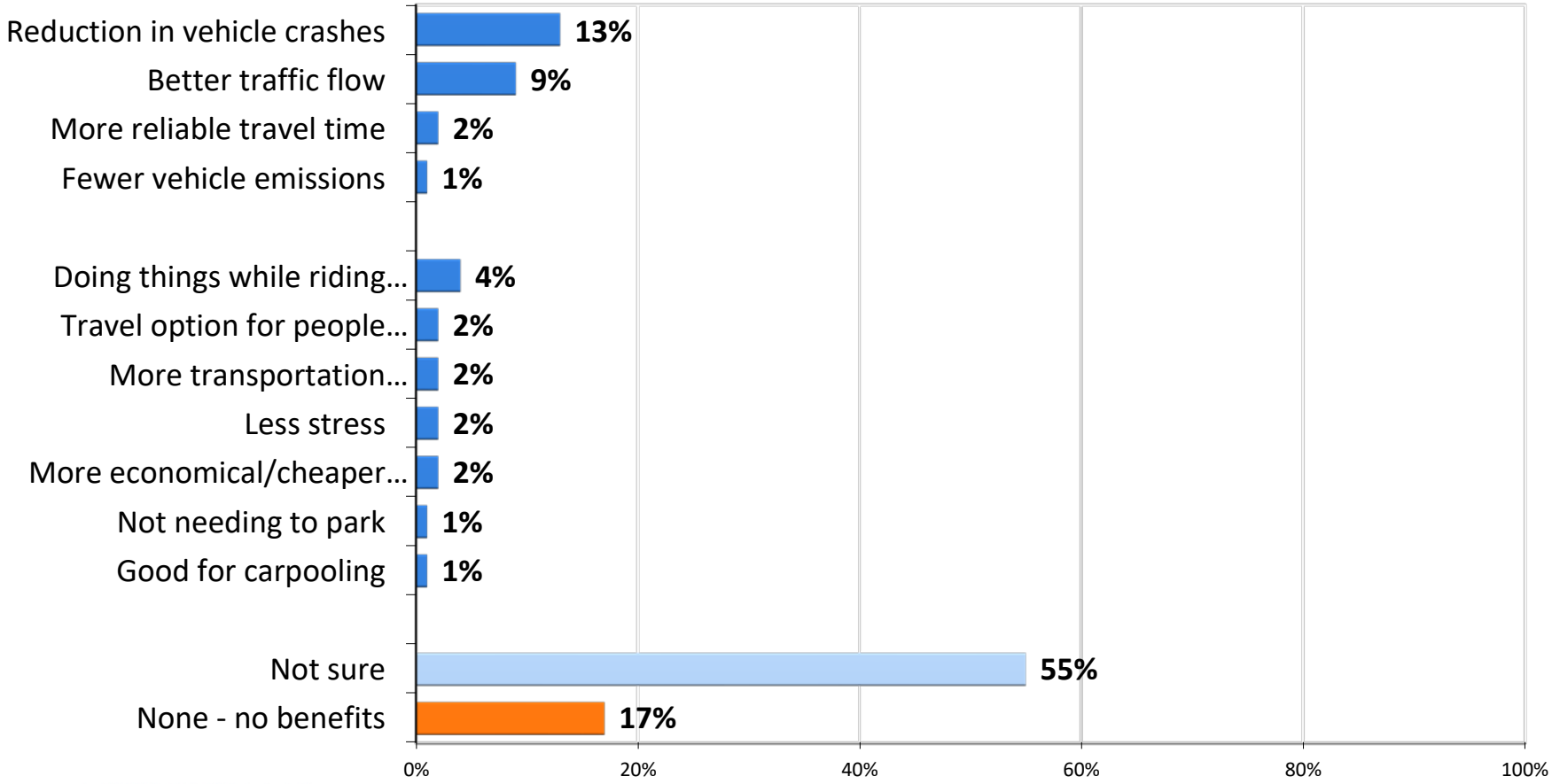
Driverless Car Benefits

72% respondents could not describe a benefit, either because they did not feel there were any benefits (17%) or because they weren't sure that there were benefits (55%).



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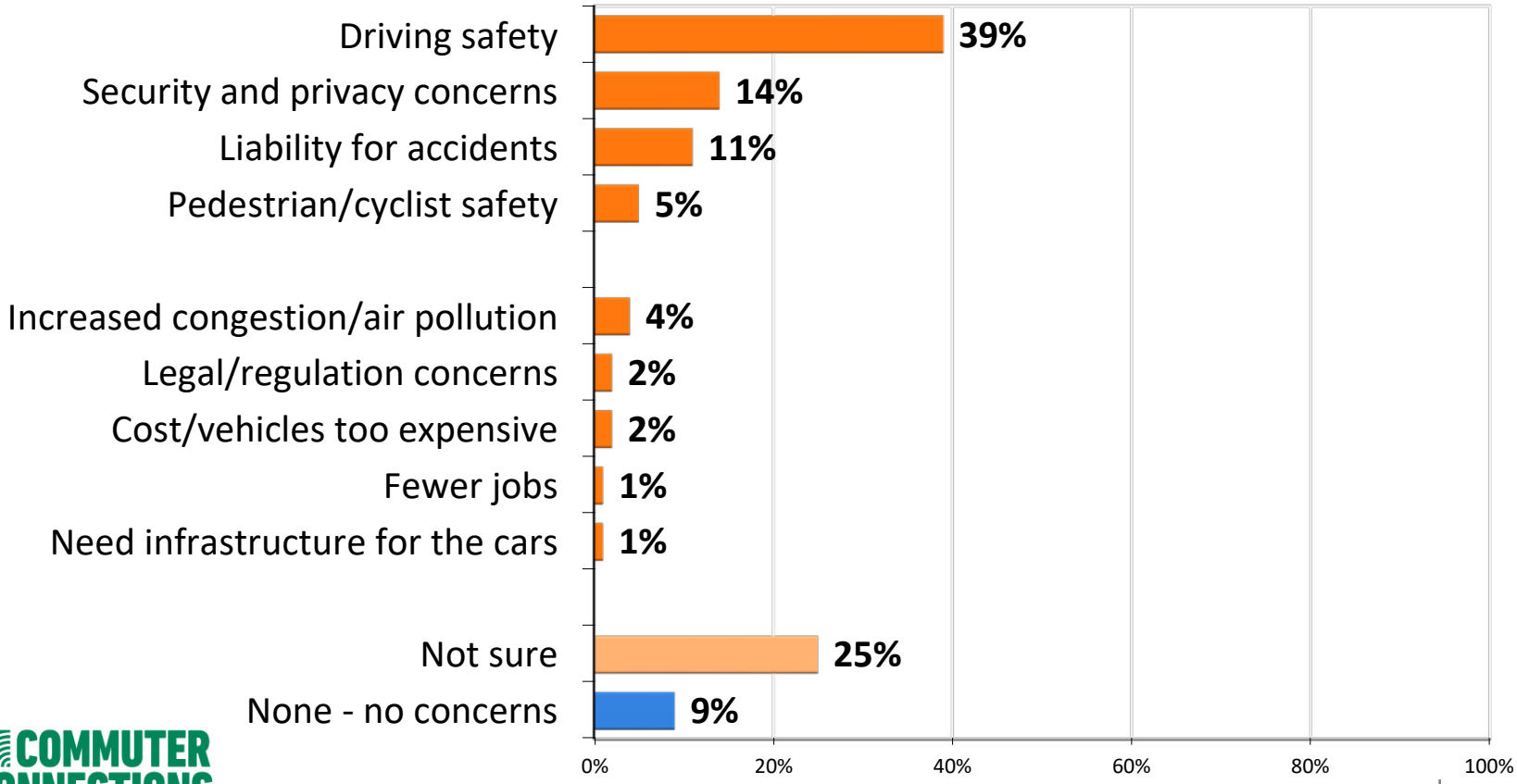
Concerns With Driverless Cars

Respondents were more likely to mention concerns about driverless cars than they were to cite potential benefits.

66% noted at least one concern that they had with driverless cars versus 28% who had mentioned a benefit



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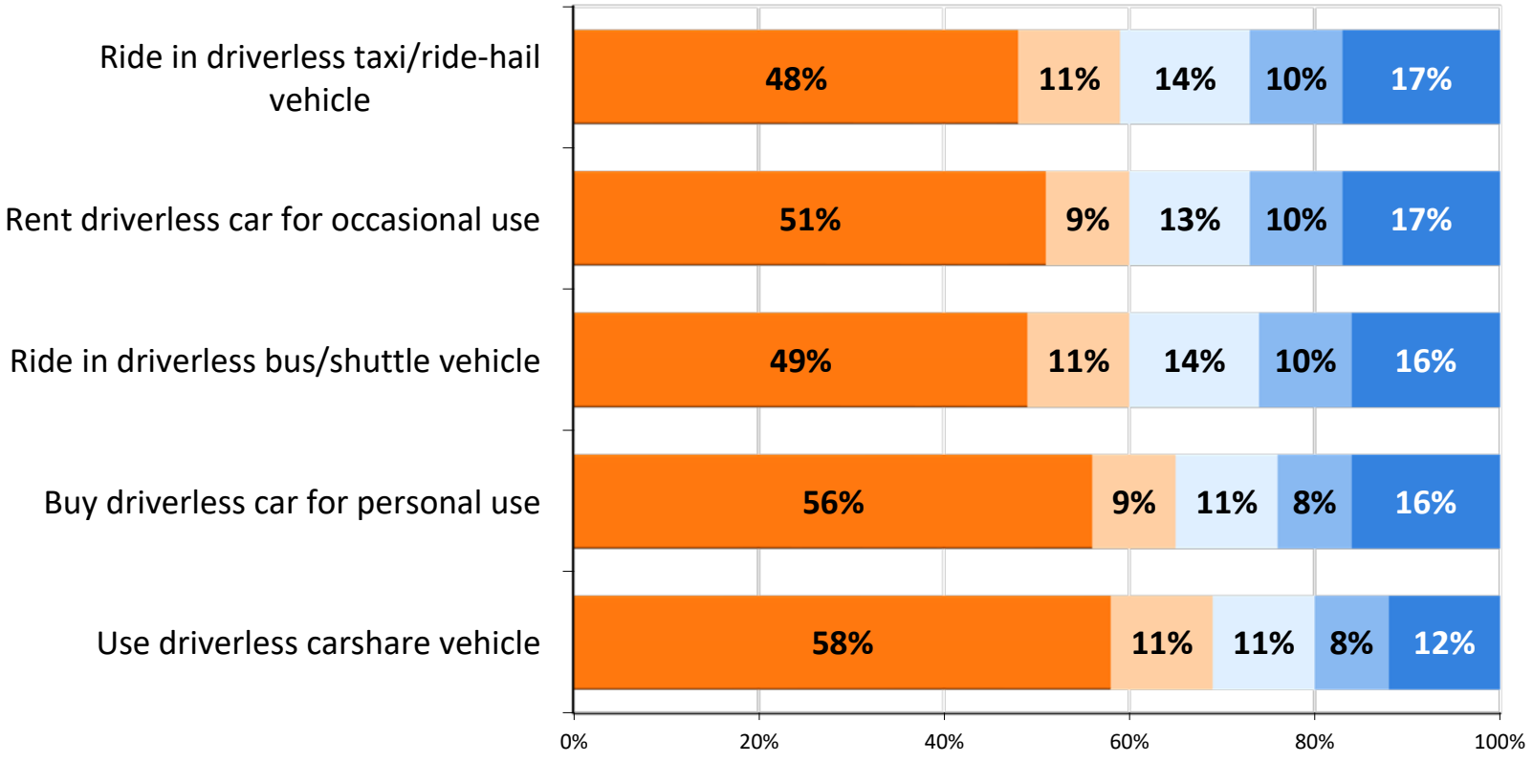
Interest in Driverless Cars

Overall level of interest was similar across scenarios, regardless of the type of vehicle described in the scenario and/or whether the vehicle was owned or rented by the respondent.



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Next Steps

- Technical Report was finalized in September 2019
- Prepare and Publish General Public Report in FY 2021

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