

COMMUTER CONNECTIONS TDM EVALUATION PROJECT

2022 State of the Commute Survey Highlights

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MWAQC-Technical Advisory Committee
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Presentation Outline

- A. Survey Background & Methodology
- B. Commute Patterns
- C. Telecommuting / Teleworking
- D. Commuter Ease and Satisfaction
- E. Employer Services

Survey Background

- Conducted as part of COG/TPB's Commuter Connections program
- Conducted every three years – since 2001
- The State of the Commute Survey (SOC) is different from and compliments the Regional Travel Survey (RTS)
- 2022 SOC survey
 - First since onset of COVID19 Pandemic (2020)
 - Contrasts with last survey before COVID19 Pandemic (2019)
 - Included additional questions related to travel impacts of the pandemic

SOC Survey Methodology

- Interviewed 8,396 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
- 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% \pm 4.3% for smallest sample)
- County level results were expanded to match the worker population
- Data also were weighted to ACS data to adjust sample for race/ethnicity and age
- Survey designed and administered through LDA Consulting, WBA Research, ESTC, and CUTR

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 Upended Commuting in 2022 vs 2019

Many aspects of commuting changed but some stayed surprisingly consistent

- Widespread commute disruptions
- Telework explosion!
- Increased use of drive alone for commute trips to outside locations
- 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
- Lower awareness of commute ads and info resources, but similar access to employer commute services

A. Commute Patterns

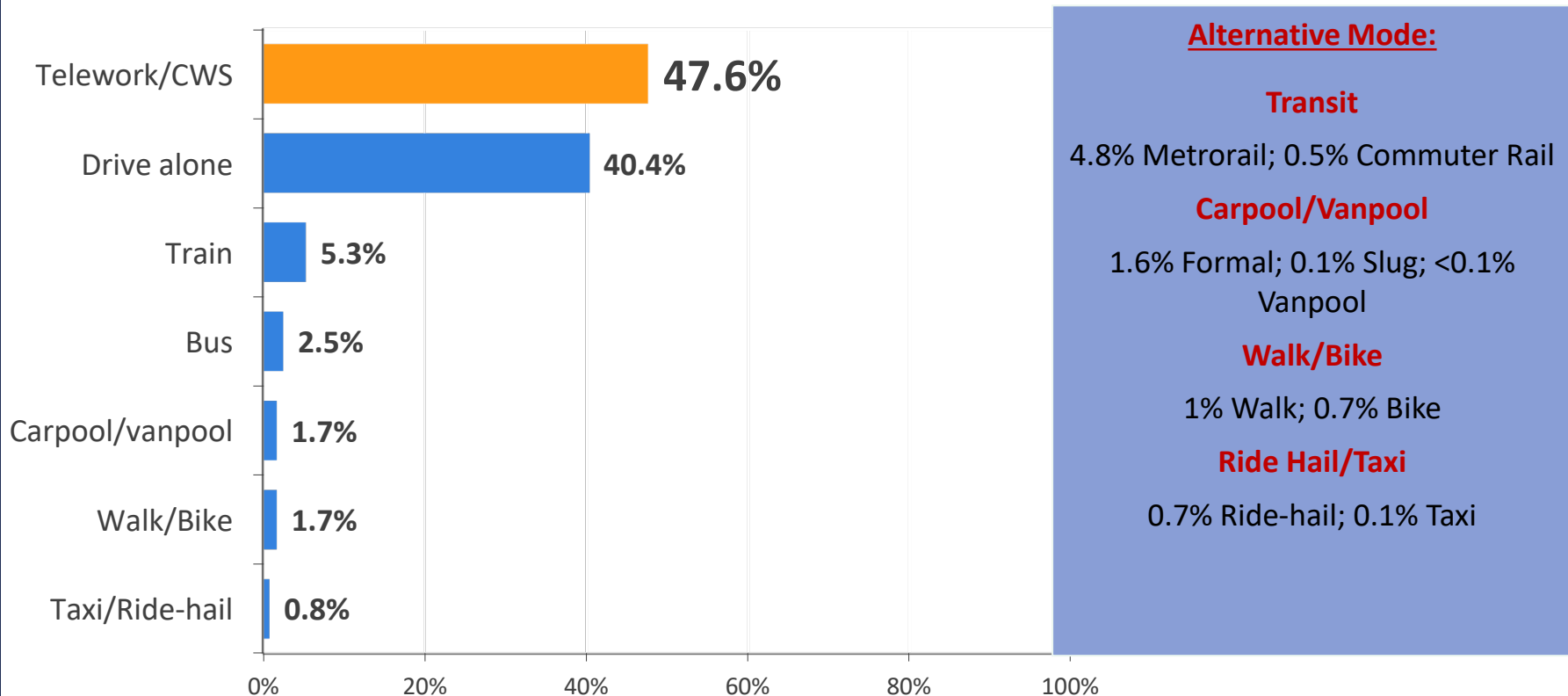
- Effect of Pandemic on Commutes
- Commute Modes and Trips
- HOV and Express/Toll Lanes

Weekly Commute Trips By Mode

Telework Accounted for almost half of Weekly Commute Trips

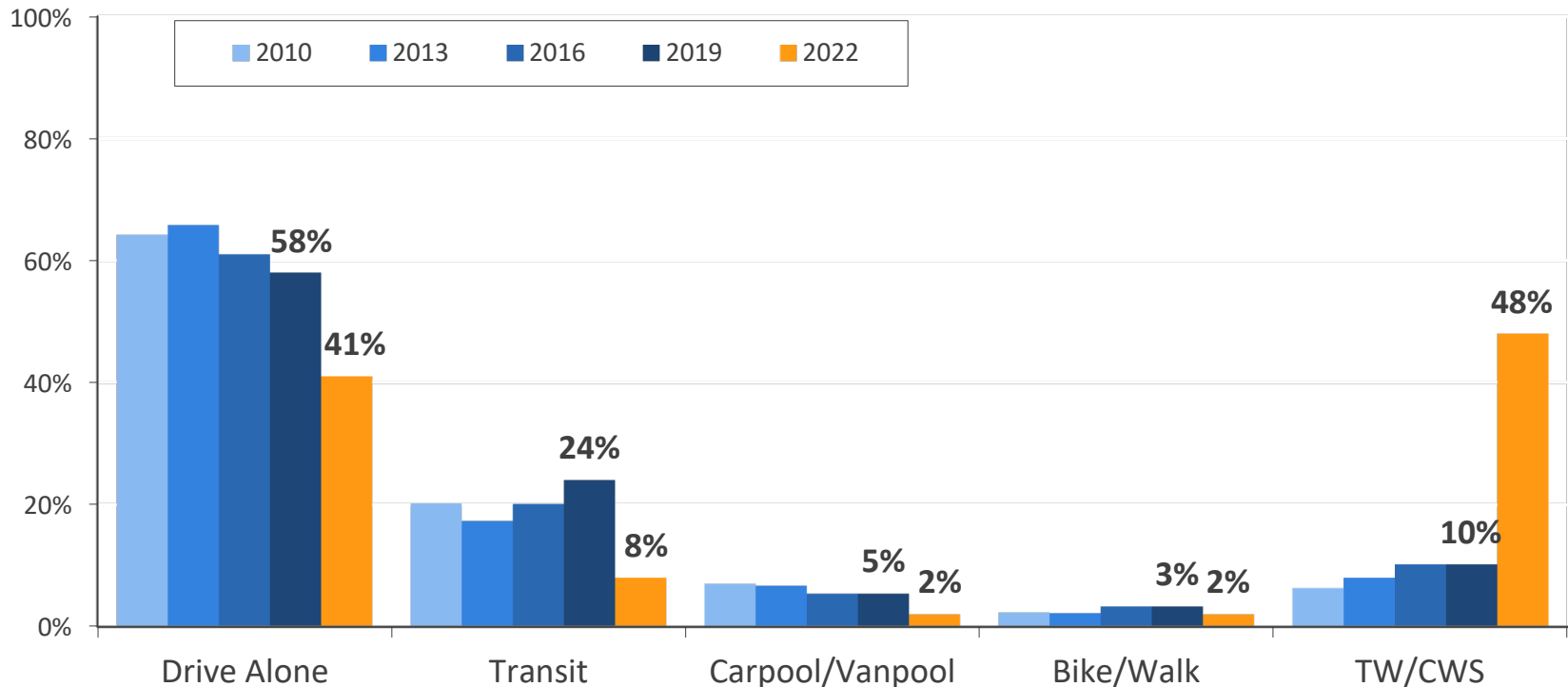
Drive alone closely followed at 40%

Transit accounted for less than 1 in 10 trips



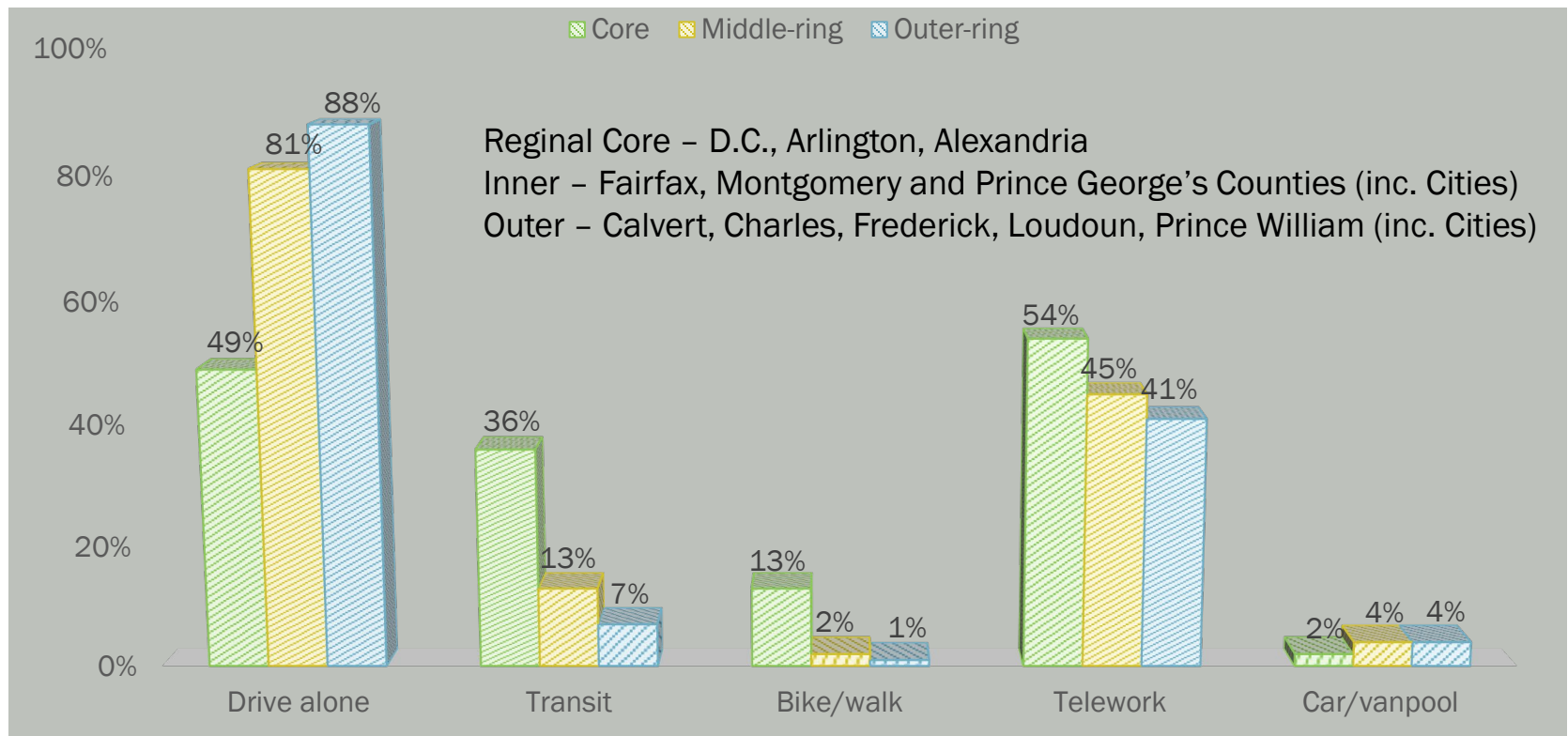
Weekly Commute Trips by Mode Trend

- Pandemic has caused a major shift in travel mode trend
 - Five fold increase in Telework
 - Three fold decrease in Transit
 - Largest drop in drive alone trips since 2010



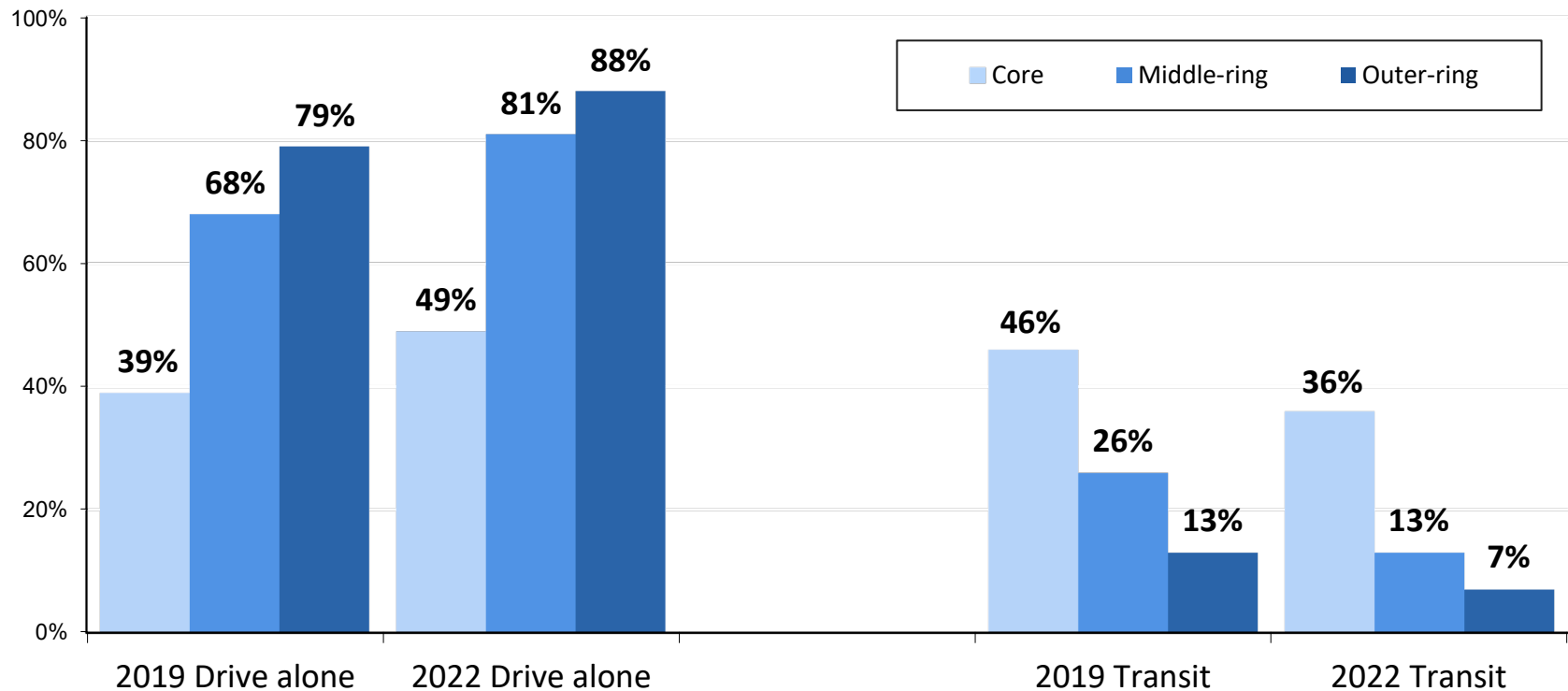
Variations in Commute Mode by Home Area

- Regional Core – Telework, Drive Alone, Transit
- Inner and Outer Jurisdictions – Drive alone, Telework, Transit
- Proportion of Drive alone twice that of Telework in Inner & Outer jurisdictions
- Proportion of drive alone close to that of Telework in Regional core



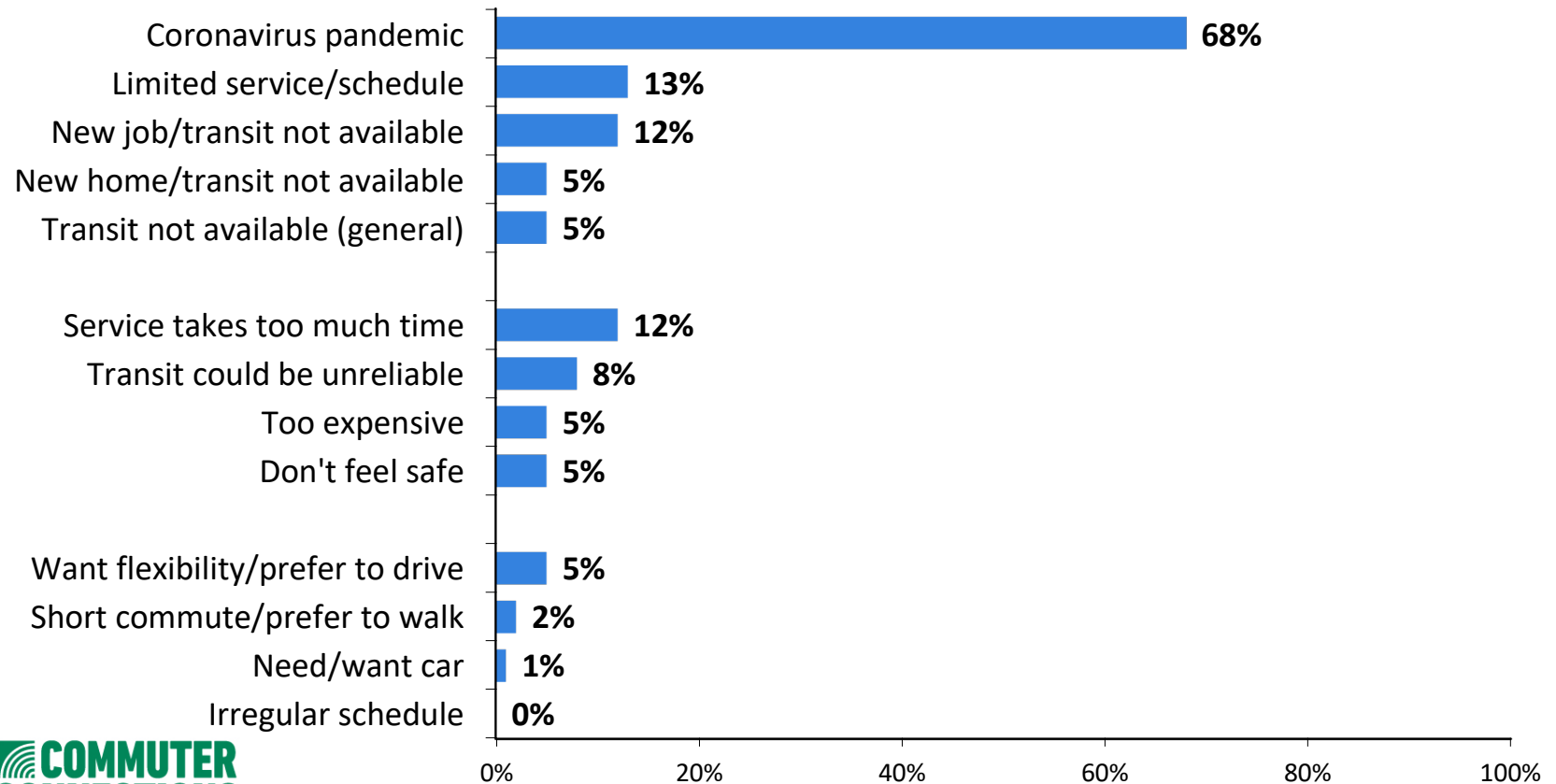
Driving Alone vs. Transit Use

- Pre-pandemic pattern still holds: Core Higher transit / Inner & Outer Higher drive alone
- Transit mode share loss in all 3 sub-areas; most (50%) in Inner and Outer
- Drive alone increased in all 3 sub areas; most in Inner jurisdictions



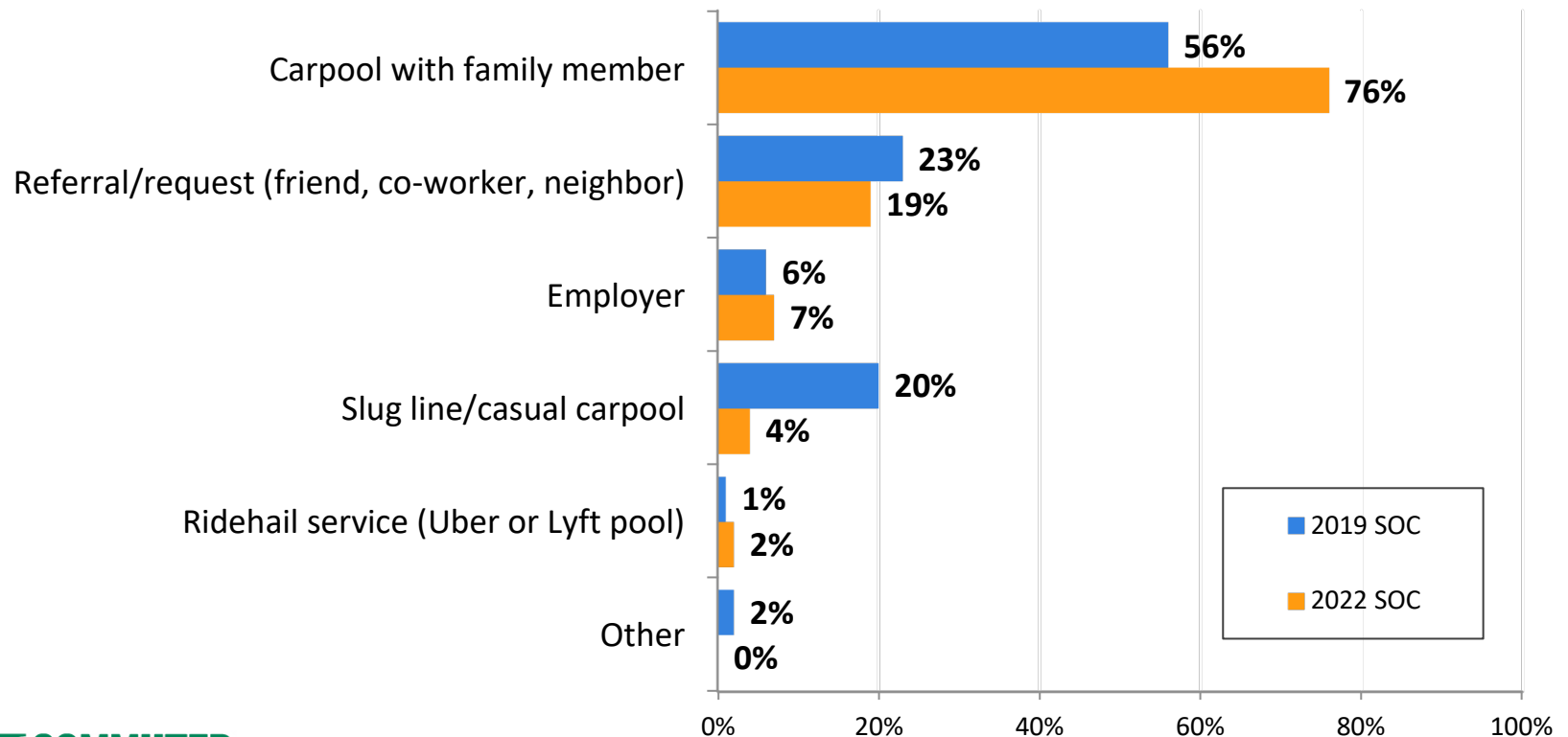
Reasons For Discontinuing Transit Use

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



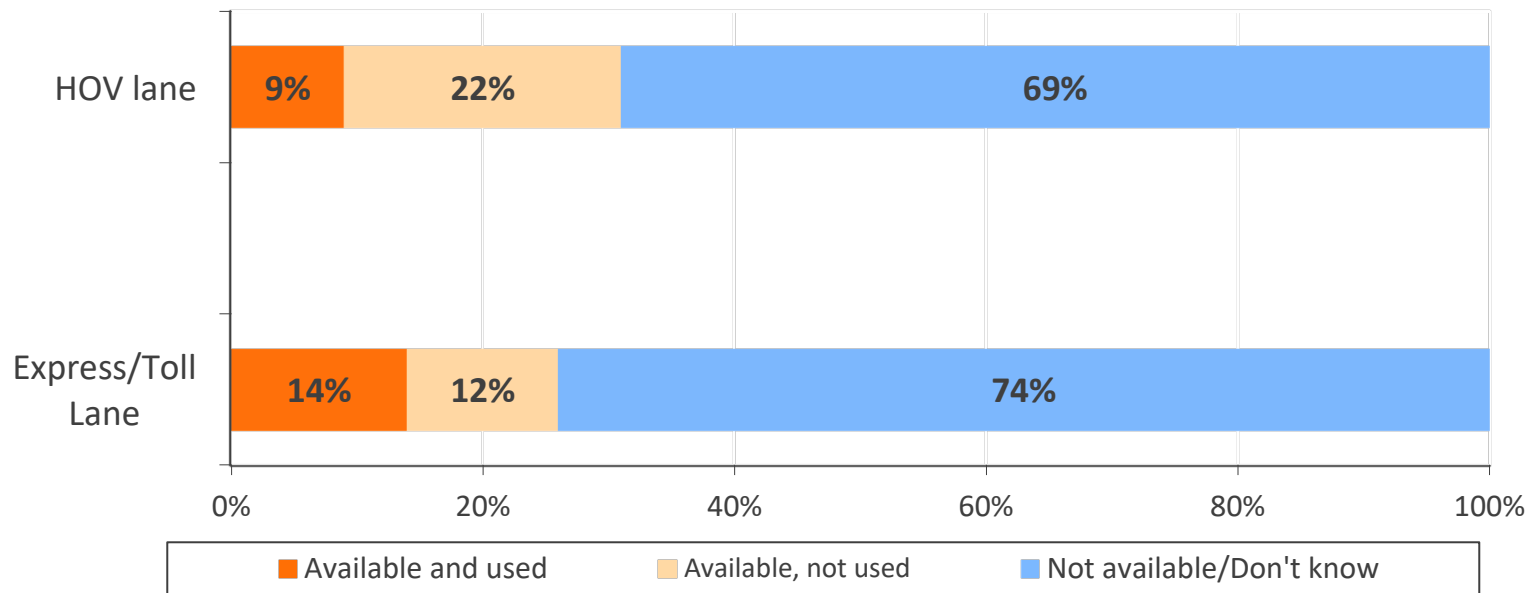
Carpool Formation

- Pandemic caused major change - 76% of Carpool with Family Members (Pre-pandemic, 2019, 56% were Household Carpools)
- Casual carpooling (Slugging) dropped significantly – 4% of all carpools (Pre-pandemic, 2019, 20% of all carpools)



Access to HOV and Express/Toll Lanes

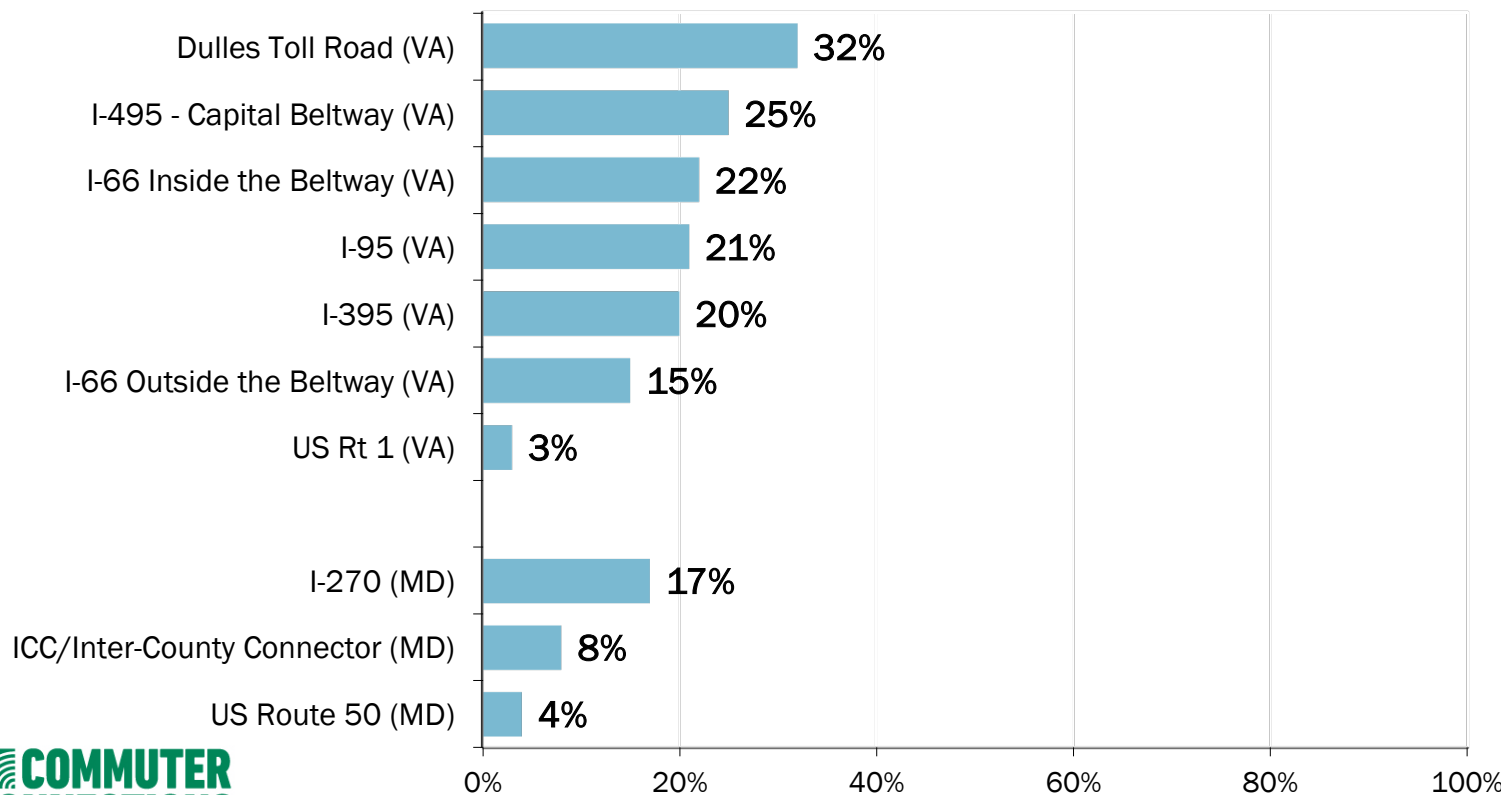
- HOV Lanes – along the work route for 31% of commuters and 9% use it
- Express/Toll Lanes - along the work route for 26% of commuters and 14% use it



- CP/VP Use is 9% With Access to HOV Lane vs 3% with No HOV or Express Lane Access

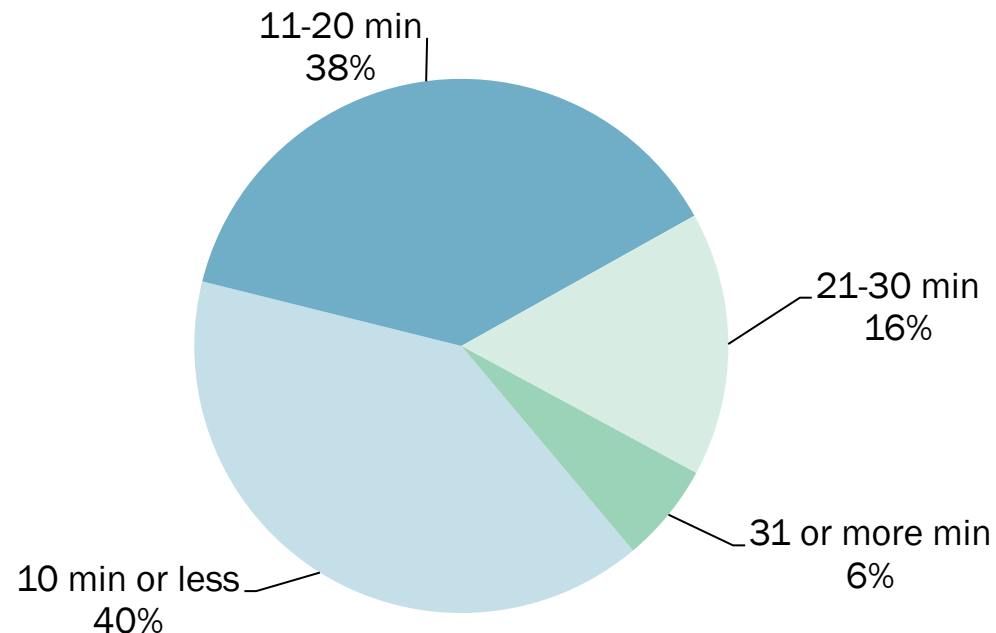
HOV and Express/Toll Lanes Use

- HOV and HOT lanes in Virginia used by more commuters than those in Maryland
- Dulles Corridor has the highest HOV lane usage
- Usage of Virginia's Capital Beltway HOT Lanes has a higher share than those along I 95/I 395



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

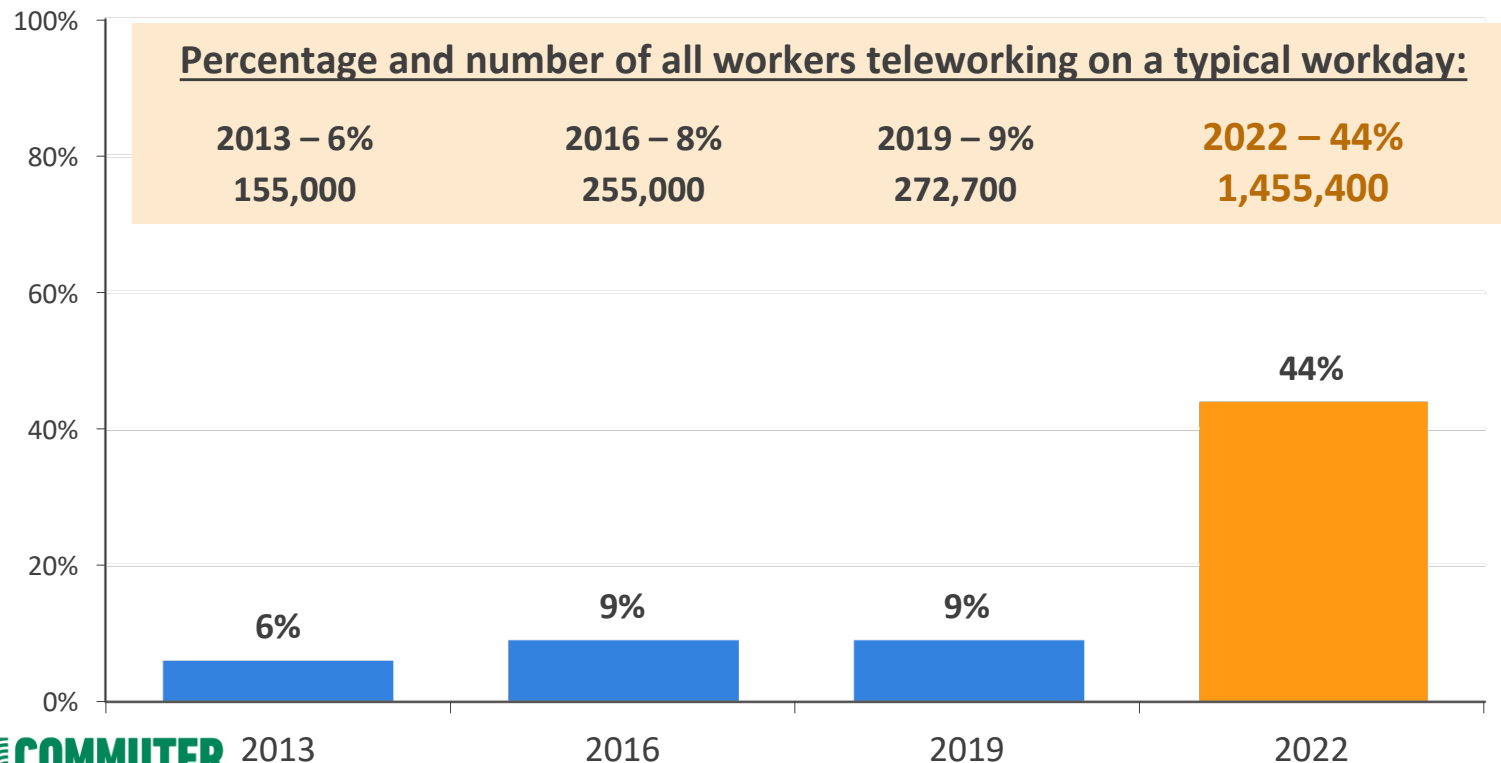


B. Telecommuting / Teleworking

- Number of Teleworkers
- Telework Frequency
- Teleworking Experience
- Future Teleworking

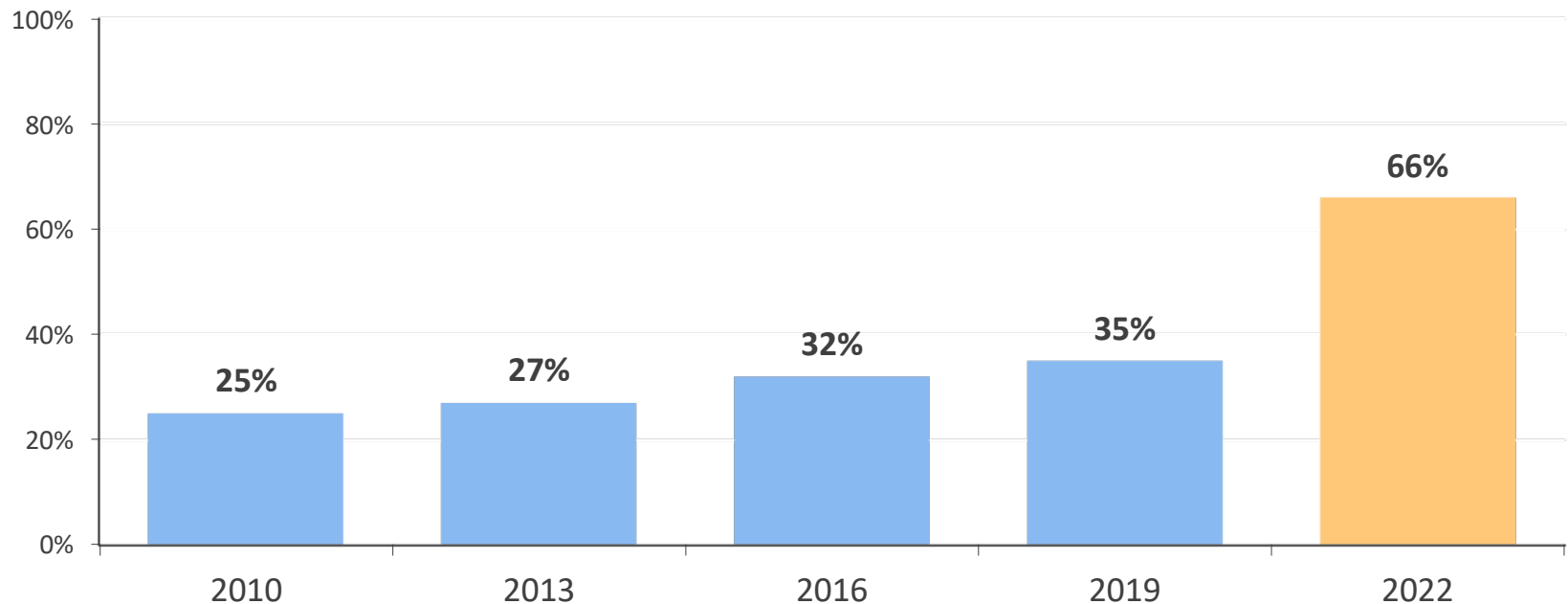
Number of Telecommuters / Teleworkers

- Telework Has Had a Dramatic Impact on Workday Commuting in 2022
 - More than fourfold increase since 2019
 - Nearly 1.5 Million Regional Workers Telework on a Typical Workday



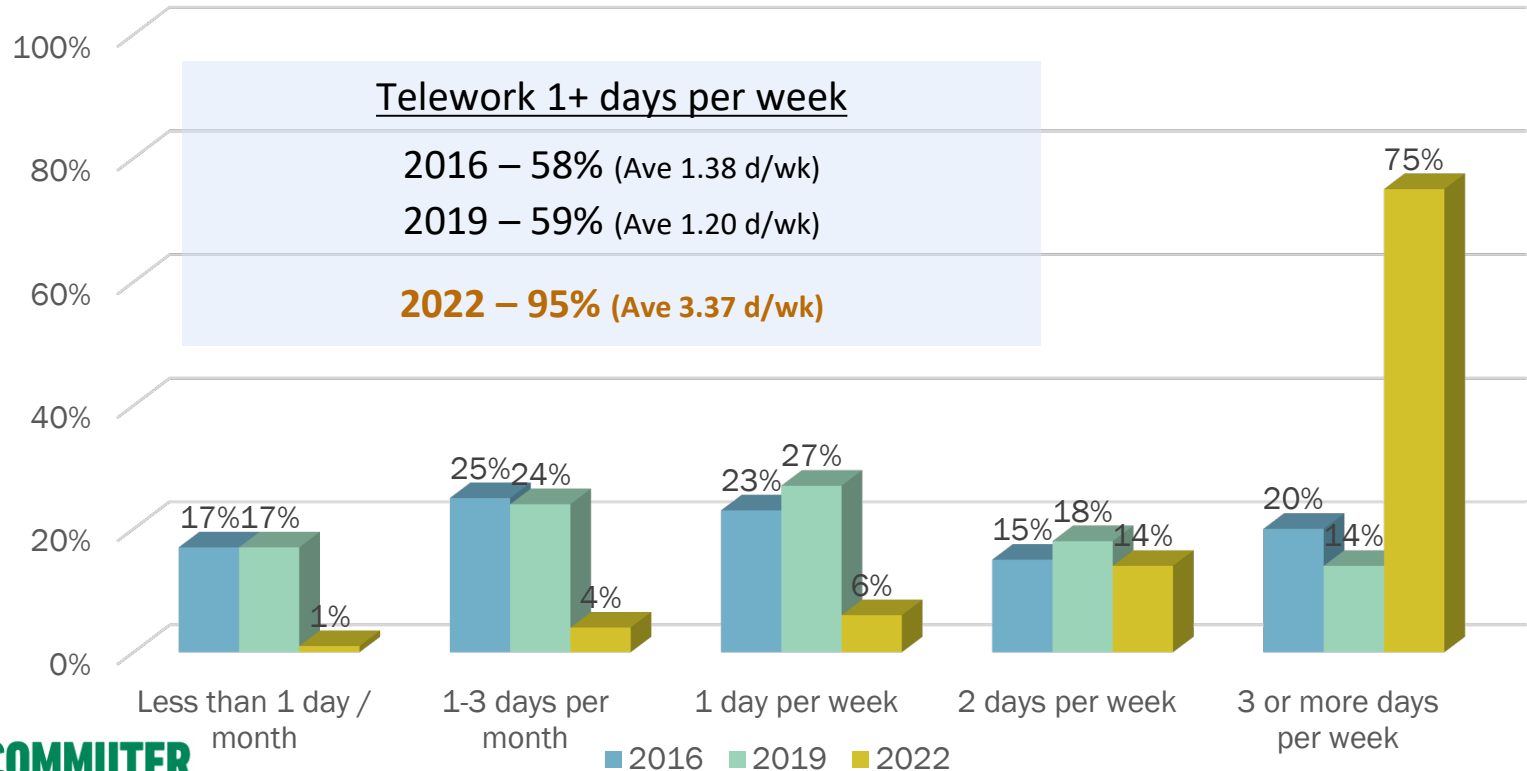
Number of Telecommuters / Teleworkers

- Proportion of commuters who teleworked occasionally or regularly doubled from 2019 levels
 - About 2.3 million of region's workers telework occasionally or regularly



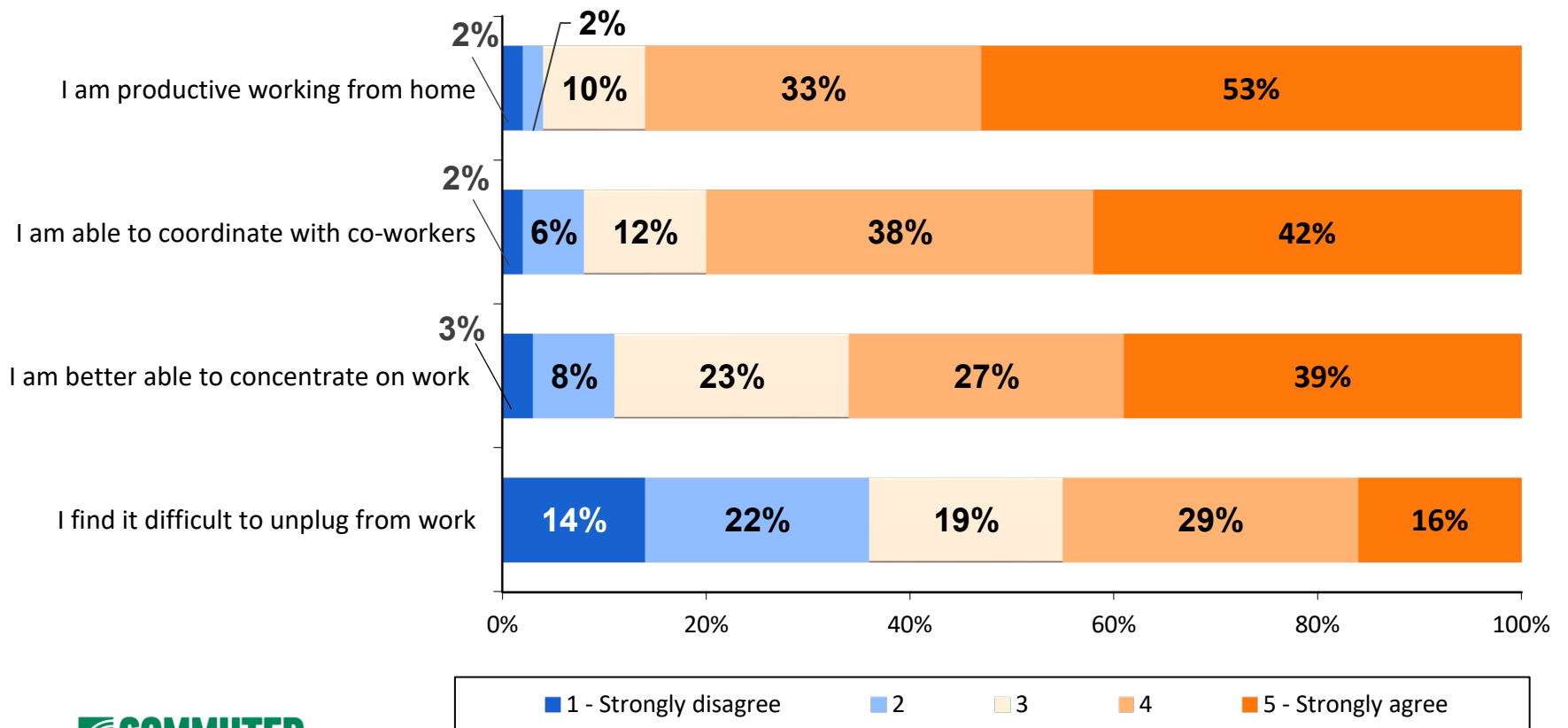
Telework Frequency

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



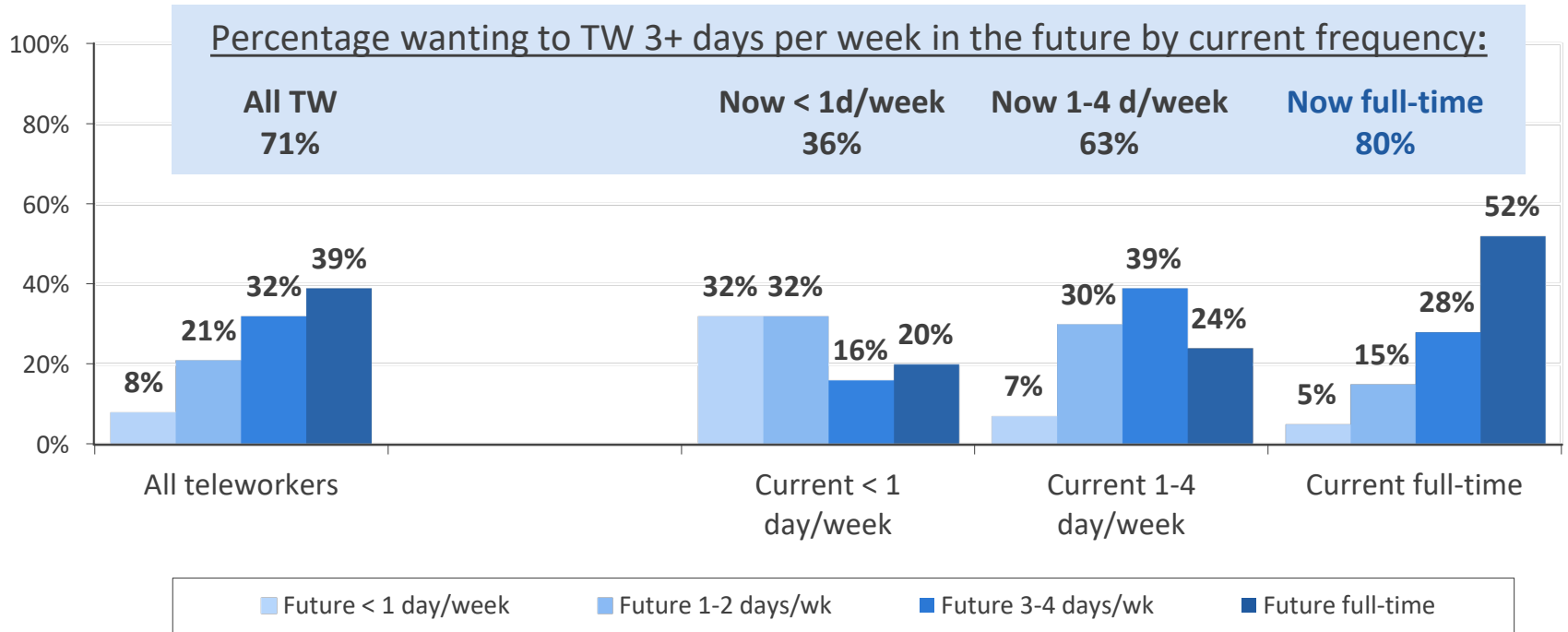
Teleworking Experience

- 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



C. COMMUTE EASE & SATISFACTION

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

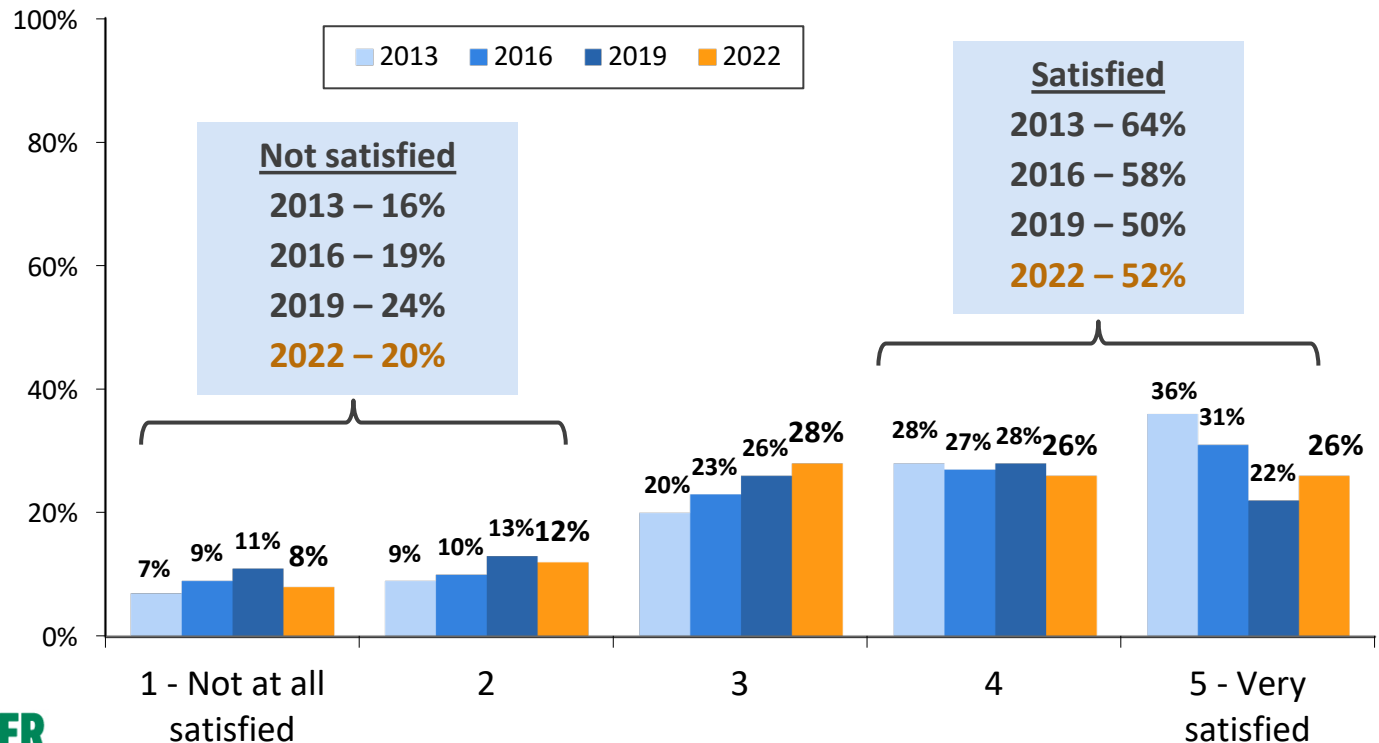
Satisfaction by Location & Time

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.

Satisfied by Travel Time

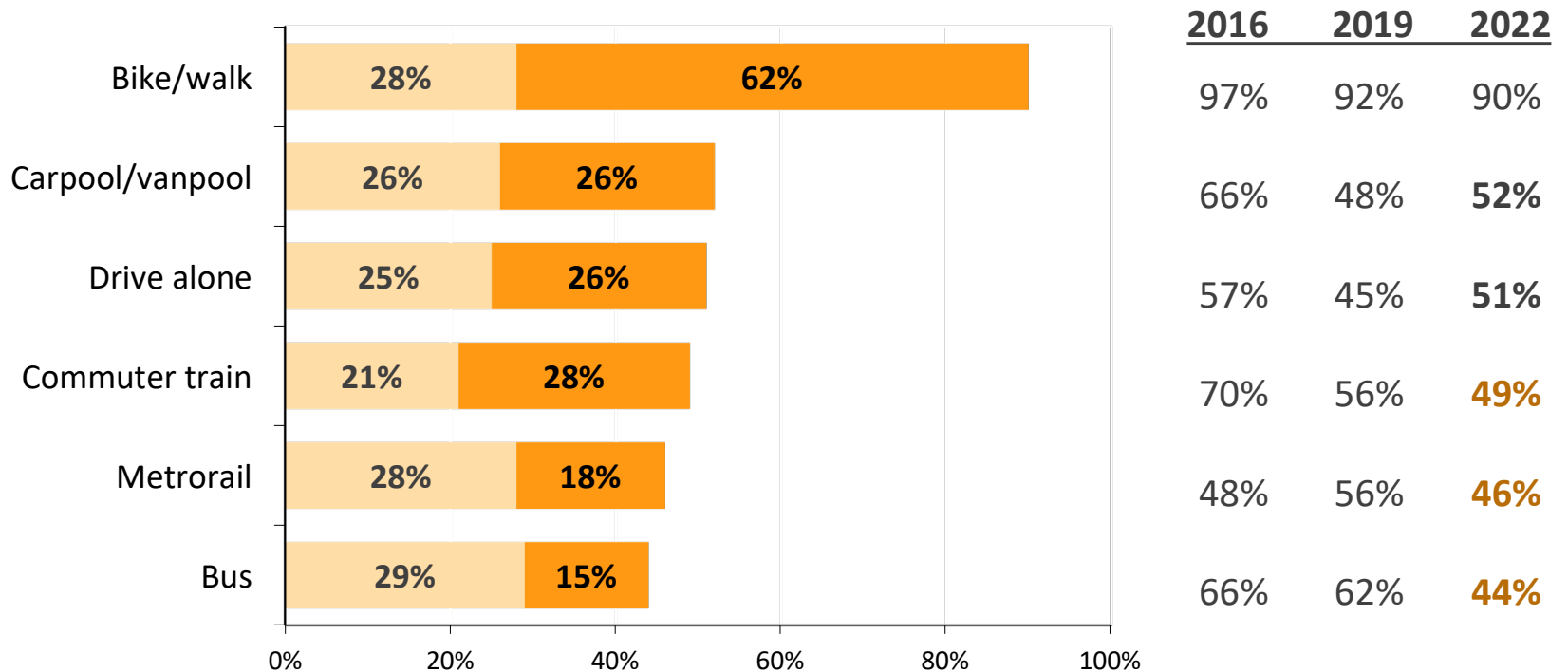
- 1-10 min – 91%
- 11-20 min – 79%
- 21-30 min – 59%
- 31-45 min – 40%
- 46-60 min – 28%
- > 60 min – 17%



Satisfaction by Mode

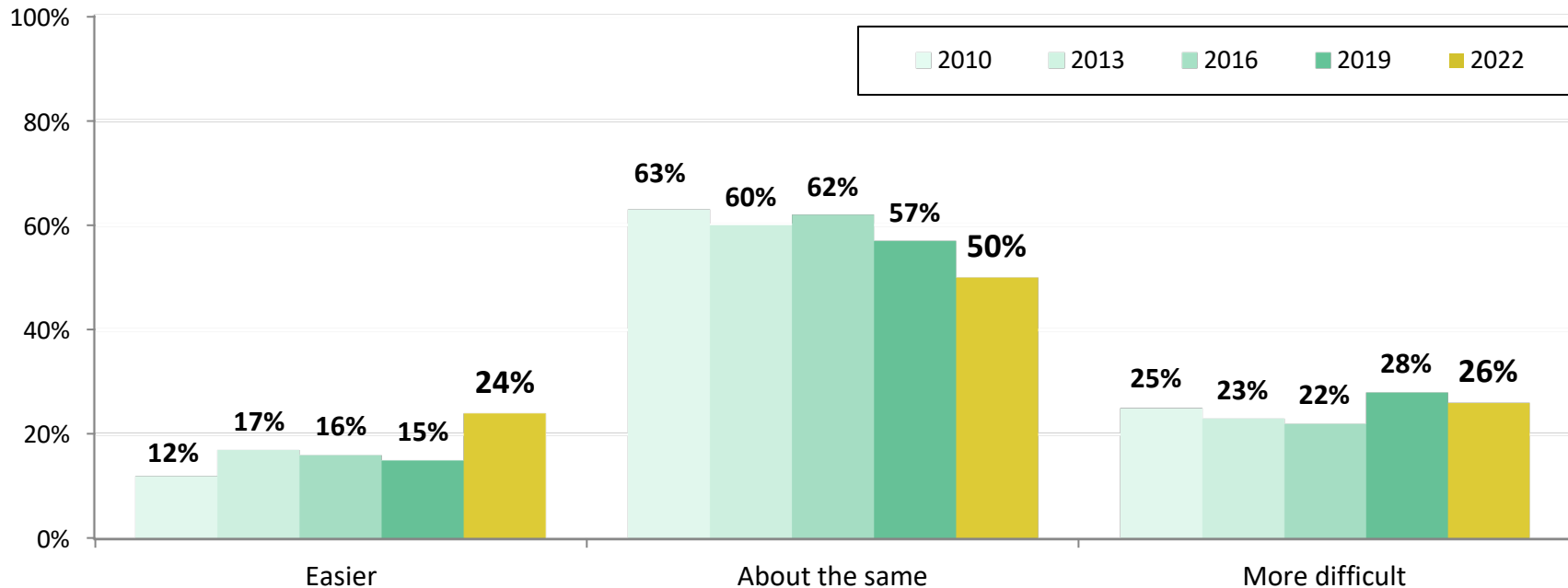
Bikers/Walkers Were Most Satisfied; Metrorail & Bus Riders Were Least Satisfied

Commuters who carpooled/vanpooled or drove alone reported higher satisfaction in 2022 than in 2019. Transit riders were LESS satisfied in 2022



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%



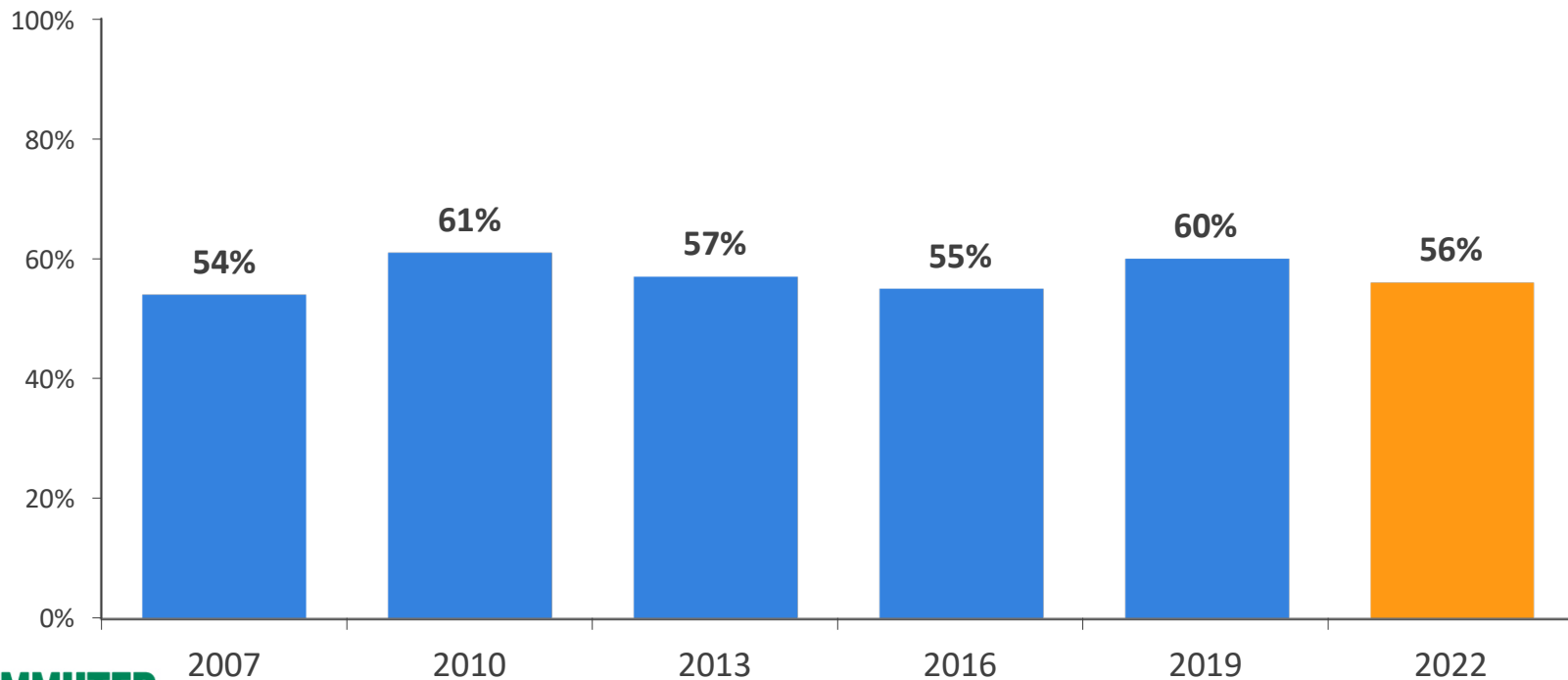
E. Employer Services

- Commute Services Offered and Used at the Workplace

Employer Commute Services Offered

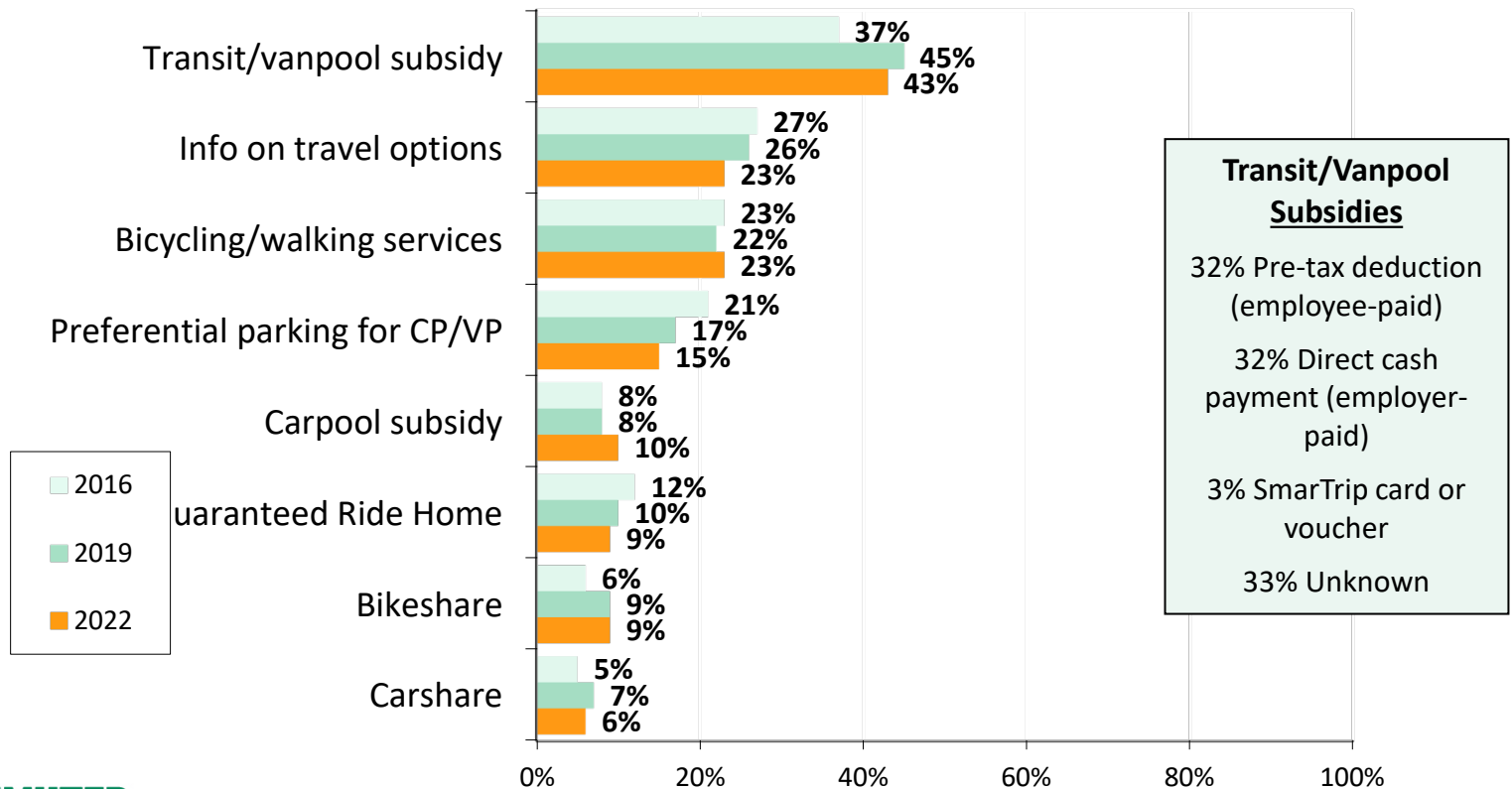
56% of Respondents Said their Employers Offered Commute Services at the Workplace

- Availability was slightly lower in 2022 than in 2019 (60%)
- Some employers may have paused or reduced services during the pandemic OR employees were less aware of services because they teleworked some or all workdays



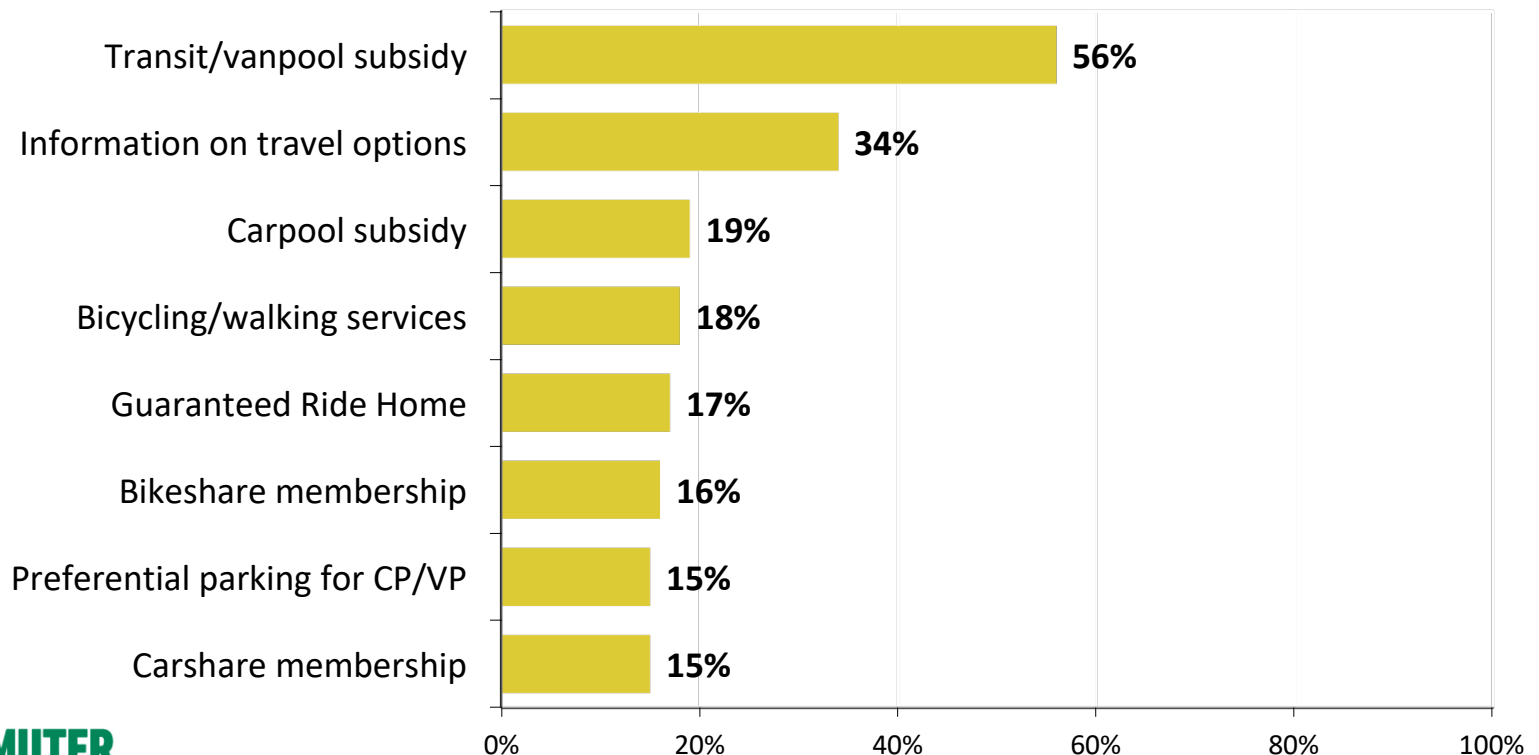
Type of Employer Commute Services

- Transit/Vanpool Subsidy Was Most Widely Available Service (43%)
- Availability of most services was not statistically different than in 2019



Use of Employer Commute Services

- Transit/VP Subsidy Also Was Most Widely USED Employer Service (56%)
- 34% used travel option info and 19% used carpool subsidy; other services used by about two in ten with access



Parking at Worksites

- Free Parking increased at worksites between 2019 and 2022
- 8% of Core workers with free parking said it was not free before the pandemic, compared with 3% of Middle Ring and 1% of Outer Ring

Parking Facilities and Services	2010	2013	2016	2019	2022
Free on-site parking (all employees)	63%	63%	64%	60%	69%
Free on-site parking (some employees)*	----	----	6%	5%	6%
Free off-site parking	2%	2%	1%	1%	1%
Employee pays all parking charges	22%	23%	24%	28%	22%
Employee/employer share parking charge	7%	7%	5%	5%	3%
Parking discounts for carpools/vanpools**	16%	14%	14%	9%	6%

Next Steps

- Finalize Technical Report this month (FY 2023)
- Prepare General Public Report in FY 2023
- Publish and distribute General Public Report in July/August 2023 (FY2024)

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