



NATIONAL CAPITOL REGION STATE OF THE COMMUTE

2016 Survey Highlights

Transportation Planning Board
September 21, 2016



Background

- Survey of the region's commuters by the TPB's Commuter Connections Program
- Sixth triennial survey starting 2001
- About 6,000 randomly-selected employed residents of the
 - Landline phones, cell phones and internet
- Provides snap shot of patterns, preferences, and satisfaction of the region's residents with their commute
- Contributes to regional database on travel trends
- Informs transportation planning and regional travel demand management program activities

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
- Employer commute assistance
- Mass marketing awareness and influence
- Awareness of CC, regional and local commute services

New Sections for 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

Key Findings

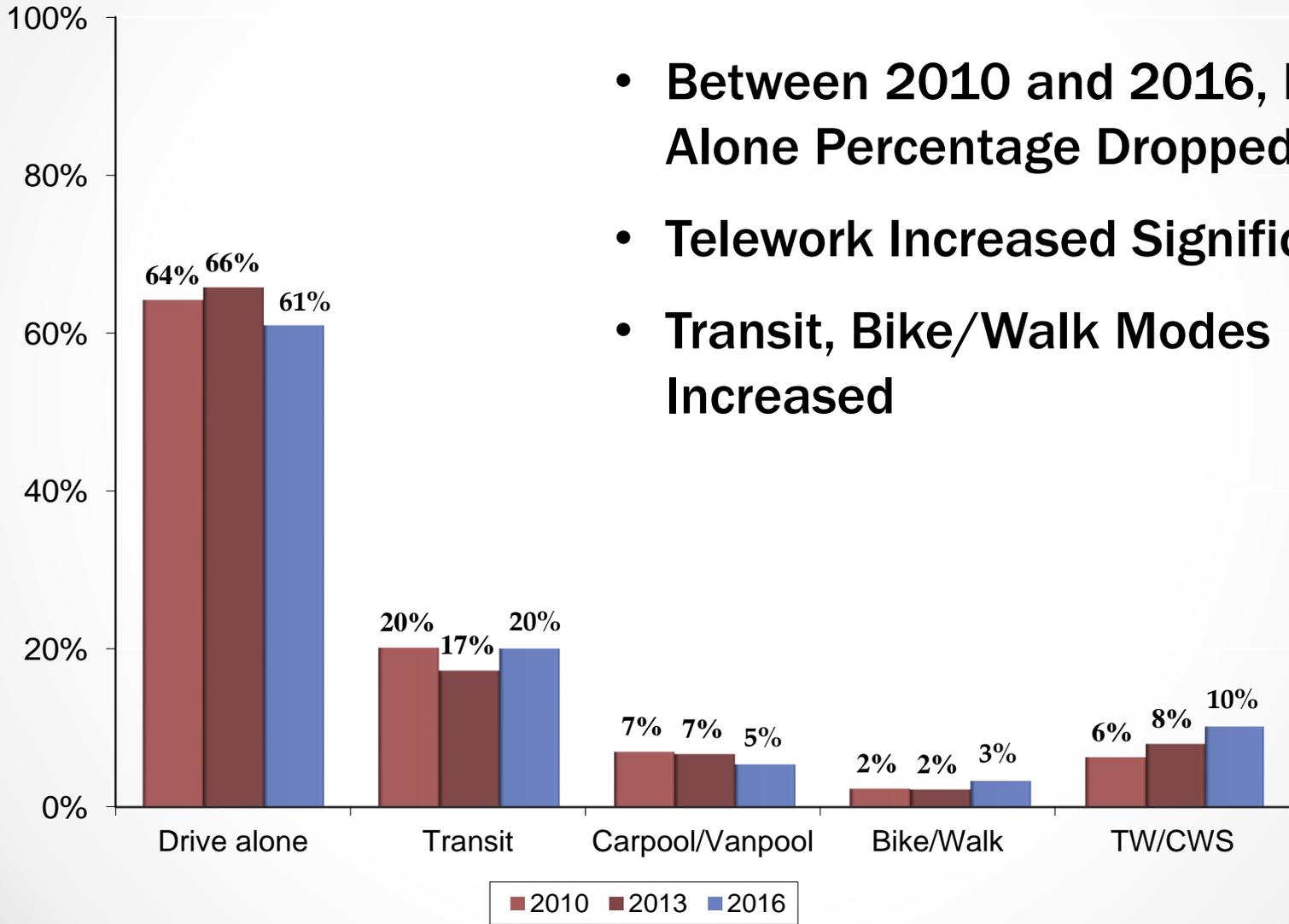
- **Drive Alone Percentage Has Dropped**
- **Average commute times for those using public transit are more than for those that drive alone**
- **About 80% of Commuters Built Extra Time Into Commute for Congestion, Incidents, and Transit Delays**
- **Telework Increased Significantly since 2013 - up from 27% to 32% of the workforce**
- **Additional 18% of the workforce could and would telework if permitted**
- **About 80% of non-telecommuters worked from home at least one day last year during a major event**
- **Most Telework Growth has been with the Federal sector**

Key Findings (con't)

- **Over 40% of Commuter Rail and nearly 50% of Metrorail riders Telework**
- **A much higher share of carpool and vanpool commuters use Express Lanes vs. those driving alone**
- **There is potential to shift some commute trips outside of peak period**
- **Overall less satisfaction with commuting and dramatic drops in satisfaction for Metrorail and Commuter Rail riders**
- **Less availability of commute benefits at worksites**
- **Saving money was the key benefit for commuters using alternative modes**

Commute Travel Mode Changes

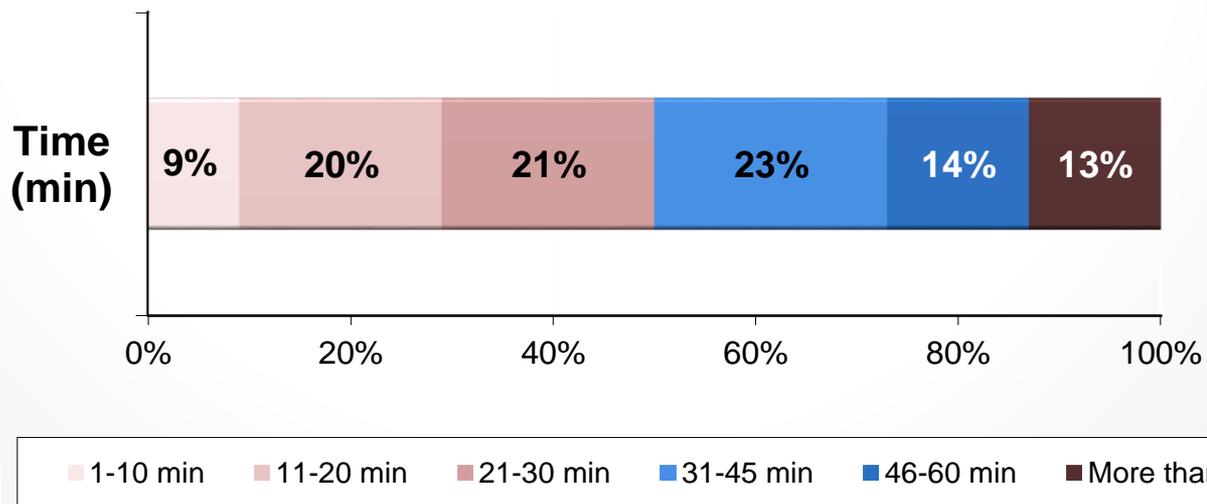
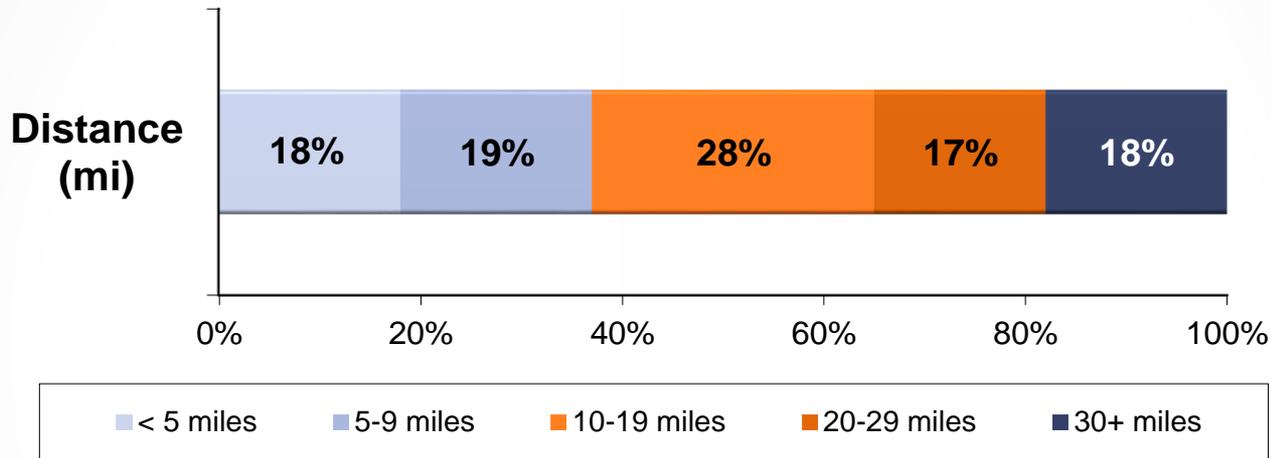
Commuter Trips
Telework
Rideshare
Satisfaction Benefits



- Between 2010 and 2016, Drive Alone Percentage Dropped
- Telework Increased Significantly
- Transit, Bike/Walk Modes Increased

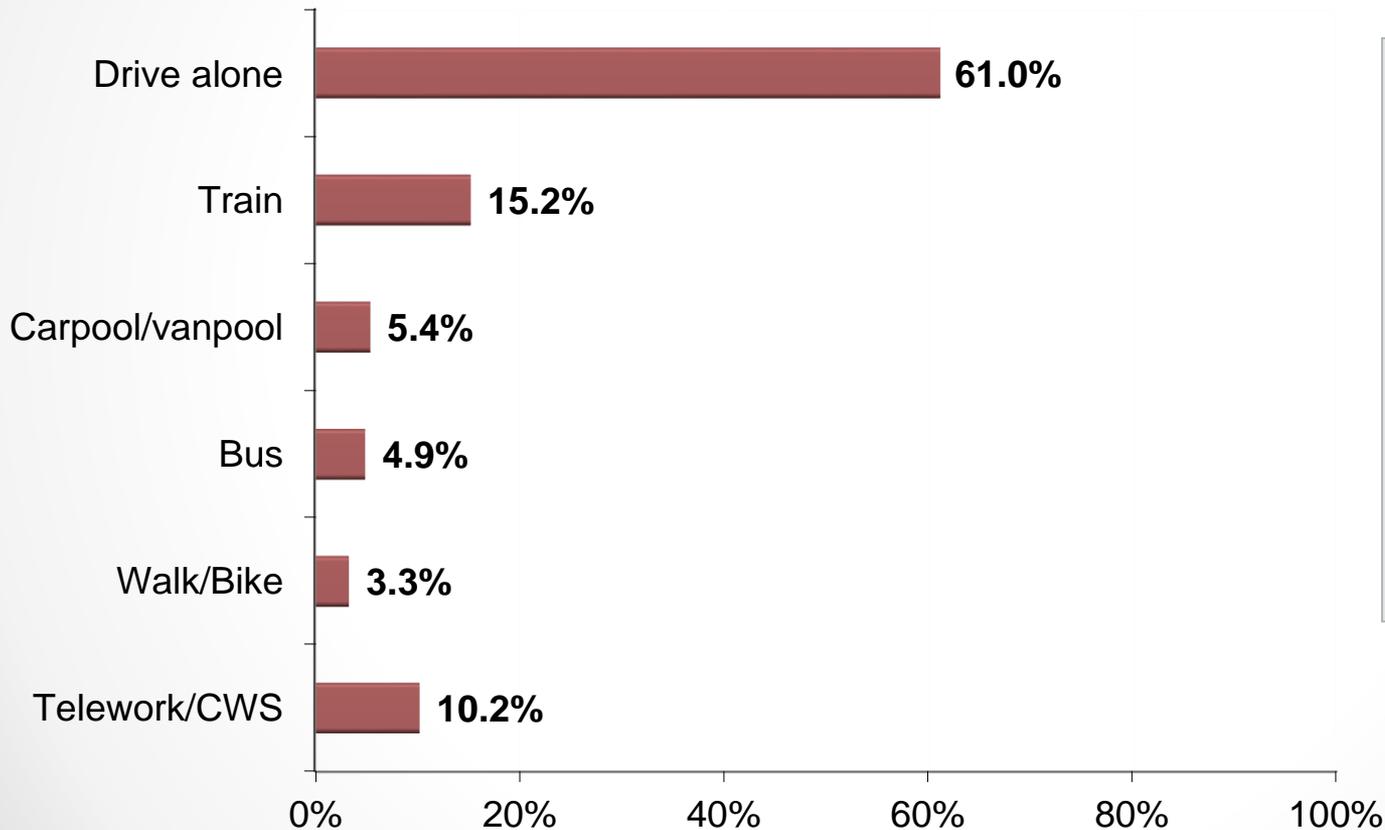
Commute Distance and Time (One-way)

- On average commuters traveled 17.3 Miles
- On average commuters traveled 39 Minutes



Commuter Modes Used In any given week:

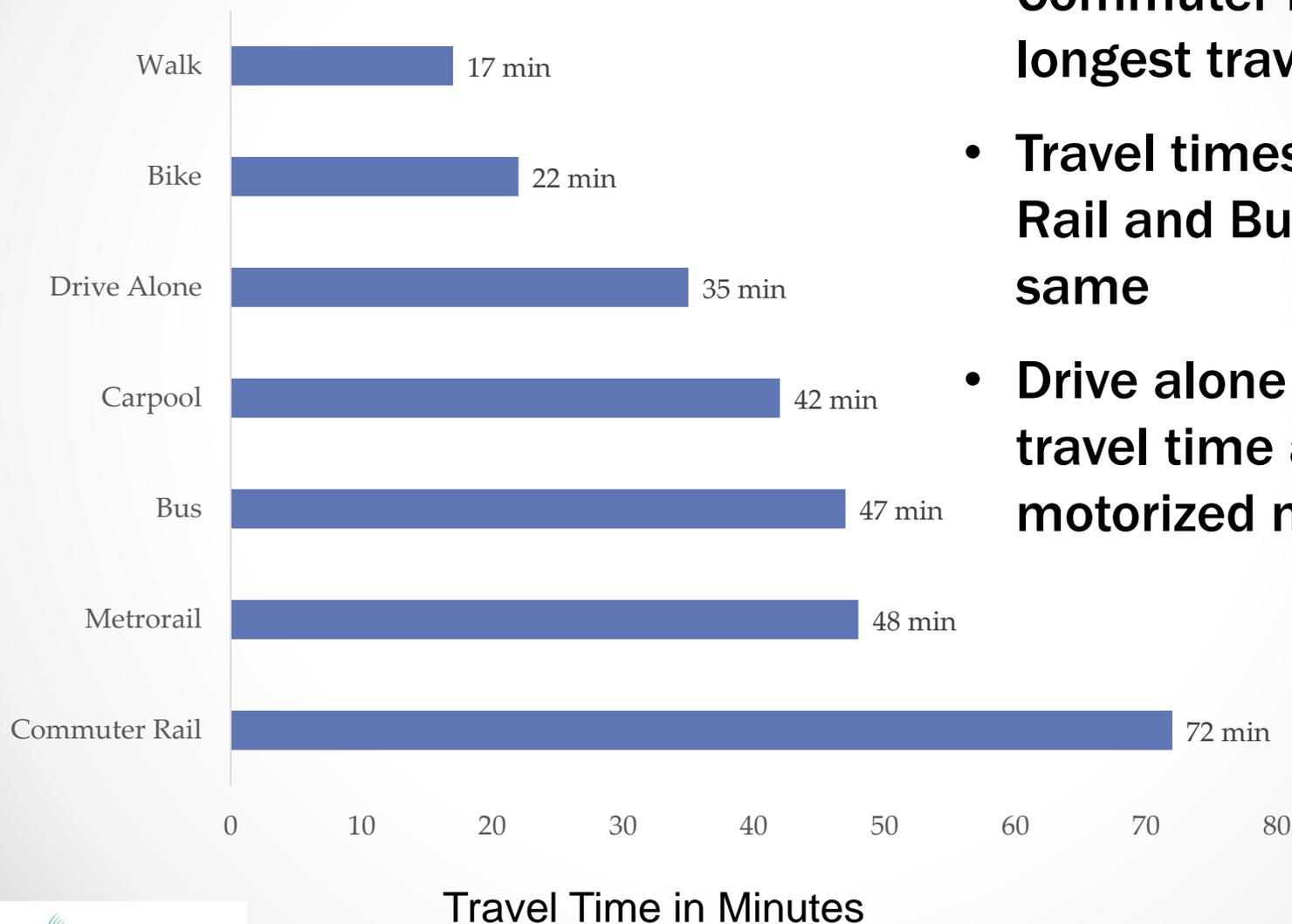
- About 60% Drive Alone and 40% Rideshare or Telework
- Those living or working in the regional core drive alone the least



| <u>Drive Alone Rate</u> | |
|-------------------------|-----|
| <u>By Home Area</u> | |
| Regional Core | 41% |
| Inner Suburbs | 65% |
| Outer Suburbs | 75% |
| <u>By Work Area</u> | |
| Regional Core | 44% |
| Inner Suburbs | 75% |
| Outer Suburbs | 80% |

Regional Core – District of Columbia, Alexandria, Arlington Co.
Inner Suburbs: Fairfax, Montgomery, Prince Georges Cos.
Outer Suburbs: Prince William, Loudoun, Frederick Cos.

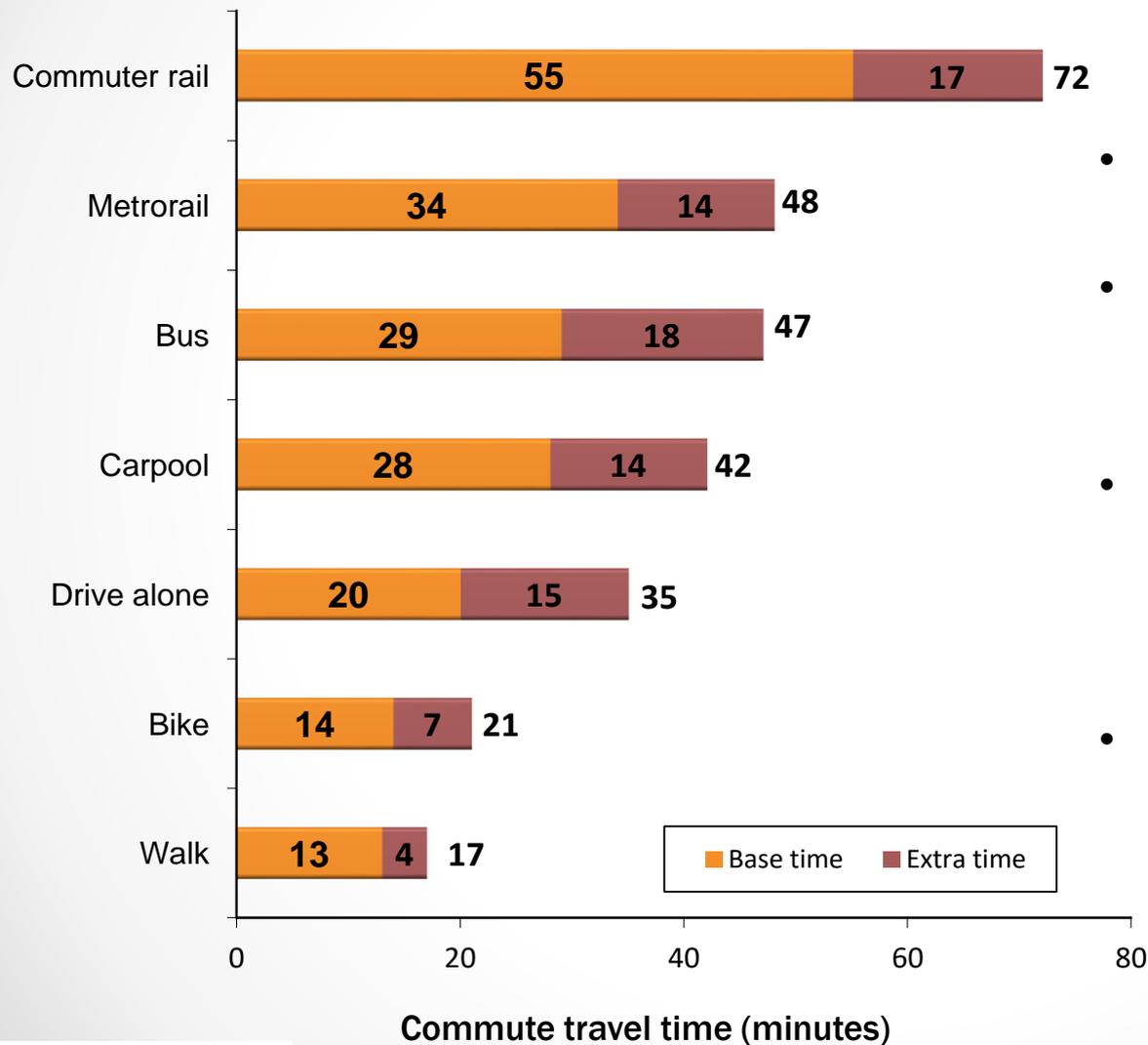
Average One-Way Commute Travel Times



- Commuter rail had longest travel time
- Travel times by Metro Rail and Bus about the same
- Drive alone shortest travel time among motorized modes

Built in Extra Travel Time

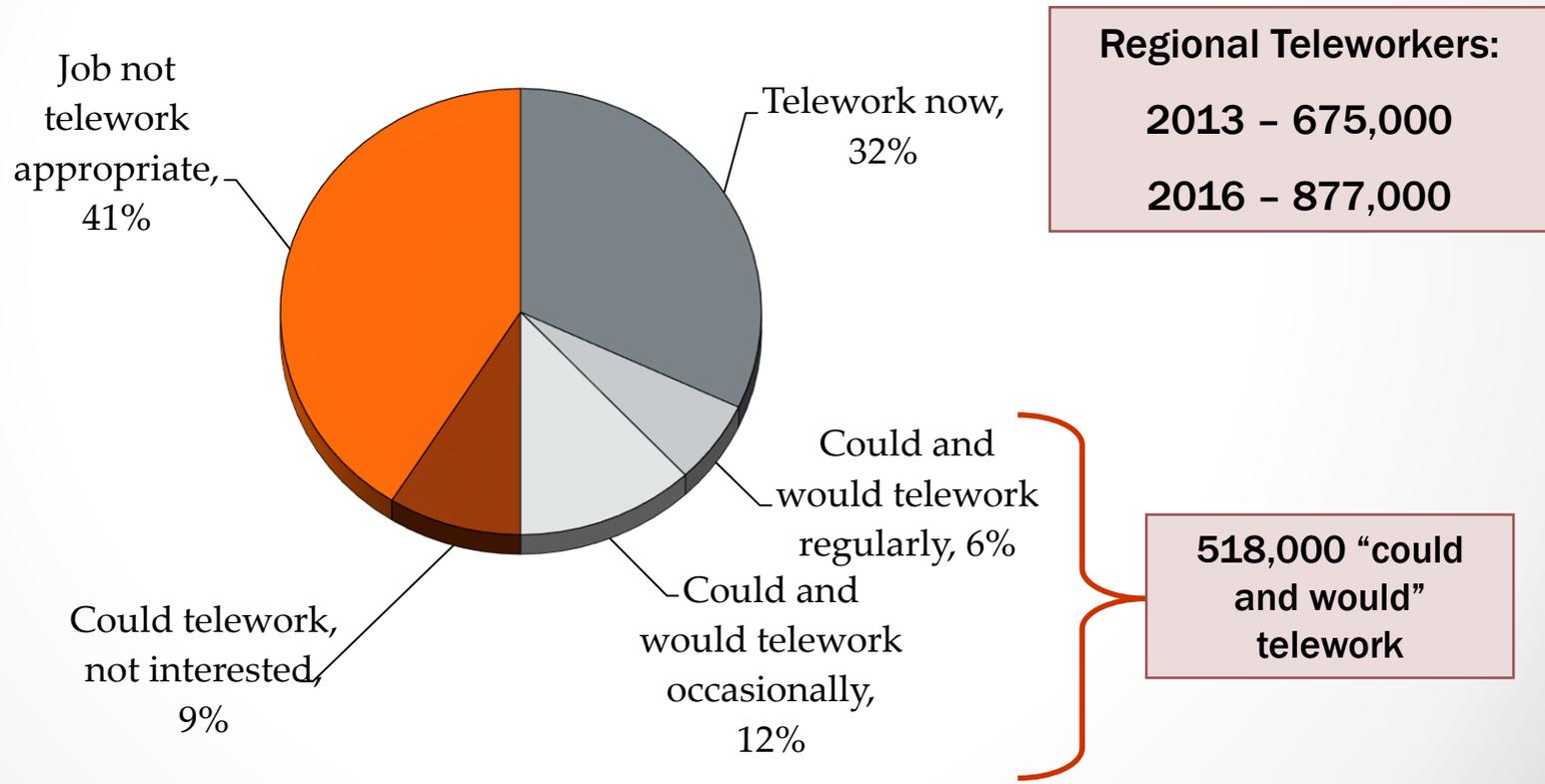
About 80% do this for Congestion, Incidents, Transit Delay



- Commuters of all modes do this
- No significant difference in amount of time built in by major motorized modes
- Those driving alone build in more time as a proportion of their total and actual travel times
- About 20% of commuters build in more than 30 extra minutes and 1/3 less than 10 minutes

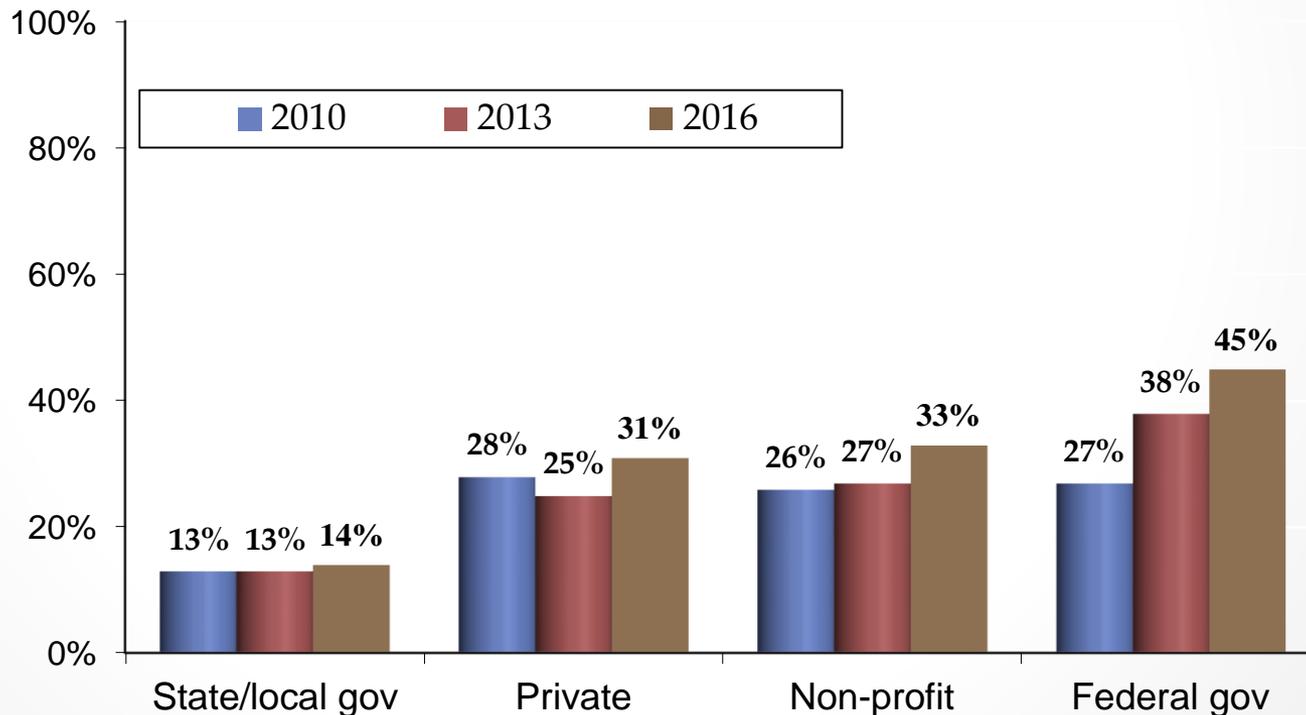
Healthy Share of Teleworking / Potential for More

- About 1/3 of commuters telework about 1.5 days a week
- 40% of Commuters' work not telework appropriate
- About 1 in 5 could and would telework a day or so if allowed



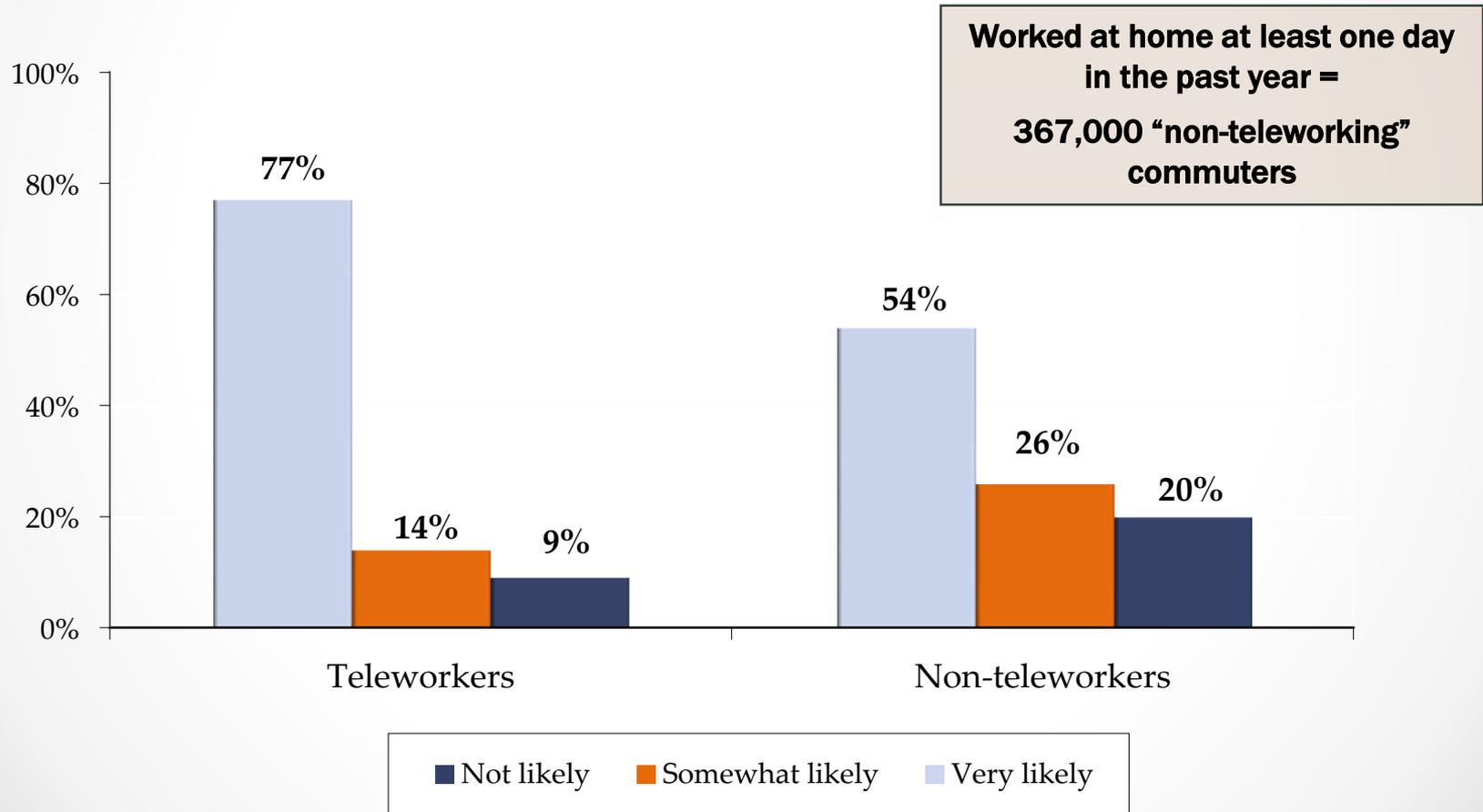
Telework from all employment sectors

- Steady growth since 2010 (About 200K new past 3 years)
- Most growth in Federal employment sector
- Potential for growth in State/Local Governments sector



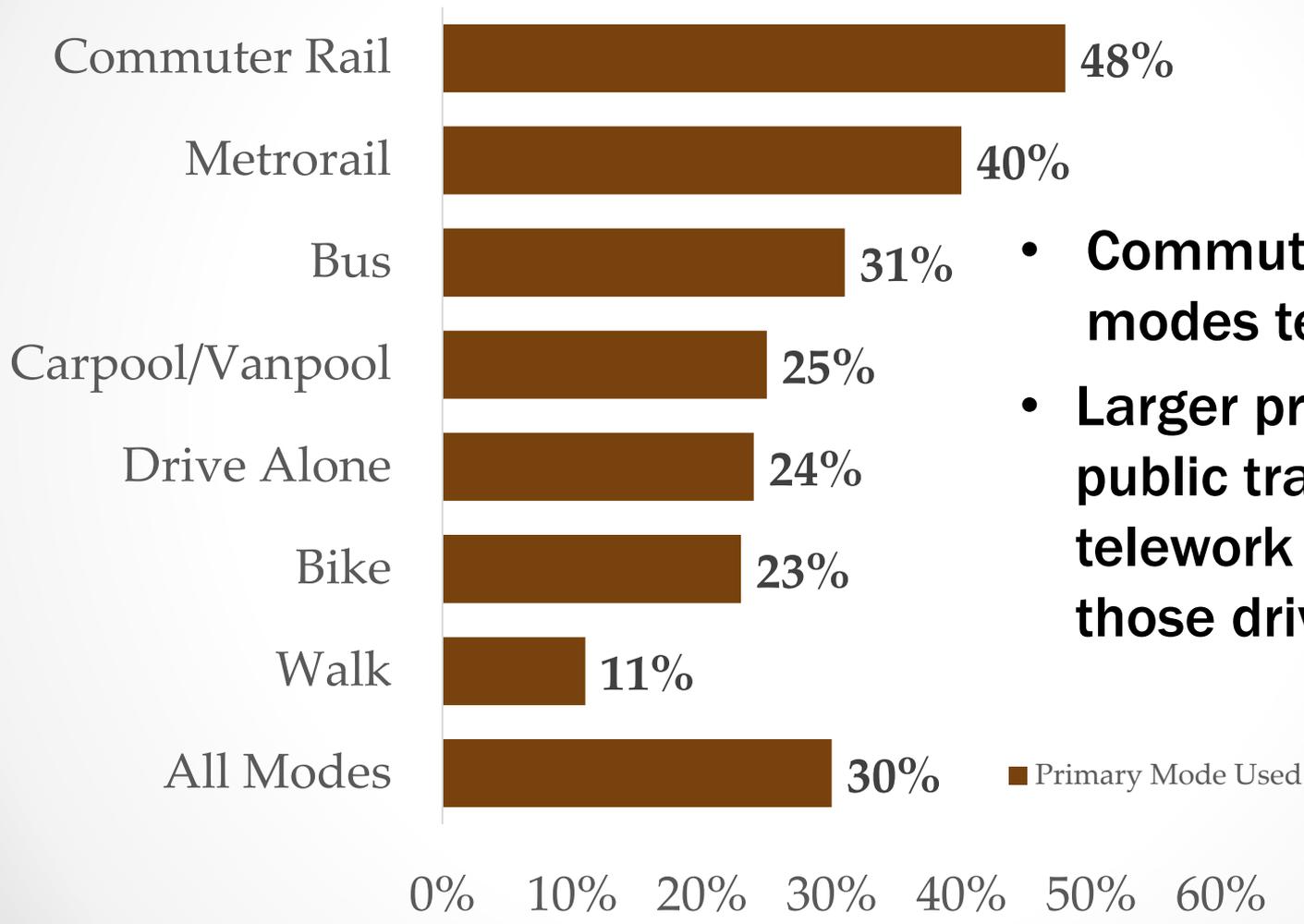
Significant potential for episodic telework

- 91% of Teleworkers / 80% of Non-teleworkers Likely to Work From Home on Major Event Days When Traffic Would be Disrupted



Percent Teleworking by Primary Commute Mode

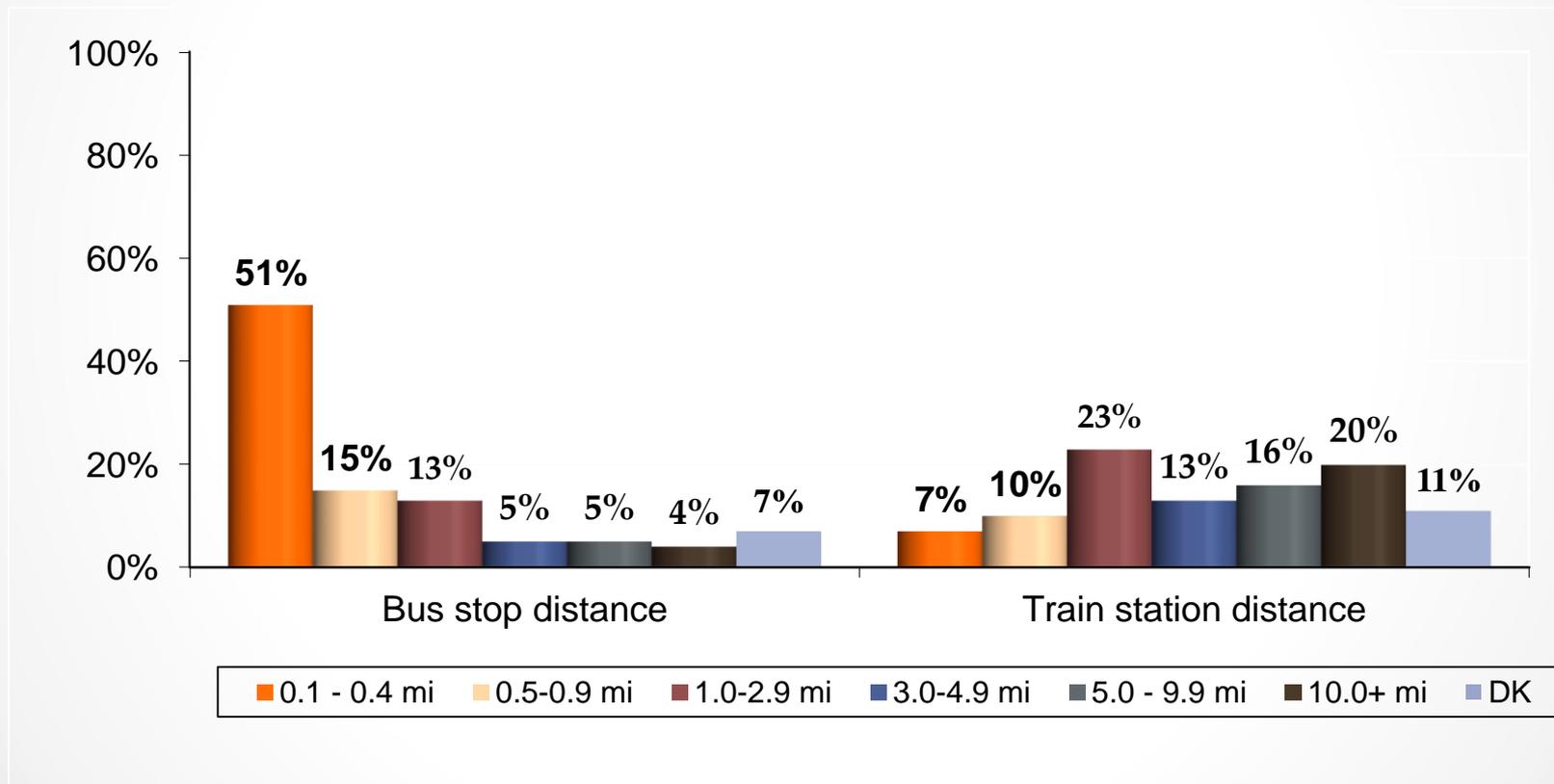
Commuter Benefits
Satisfaction
Rideshare
Telework
Commuter Trips



- Commuters of all modes telework
- Larger proportion of public transit users telework relative to those driving alone

Commuters' Proximity to Transit Station

- **Bus stop: Two-thirds live less than 1 mile away**
- **Train station: 17% live less than 1 mile; 40% less than 3 miles**

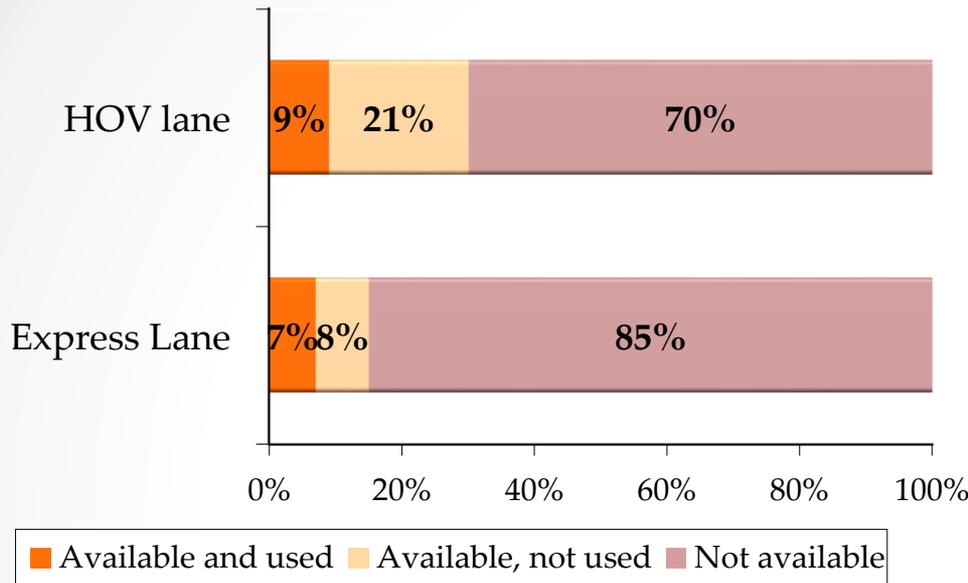


Q44a About how far from your home is the nearest bus stop?

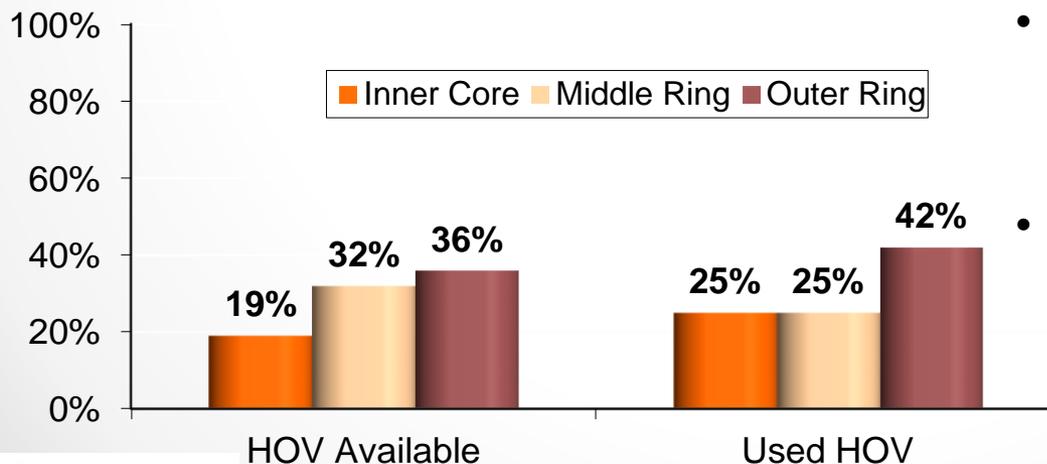
Q44b How far from your home is the nearest train station?

Access to And Usage of HOV and Express Lanes

Satisfaction Benefits
Rideshare
Telework
Commuter Trips



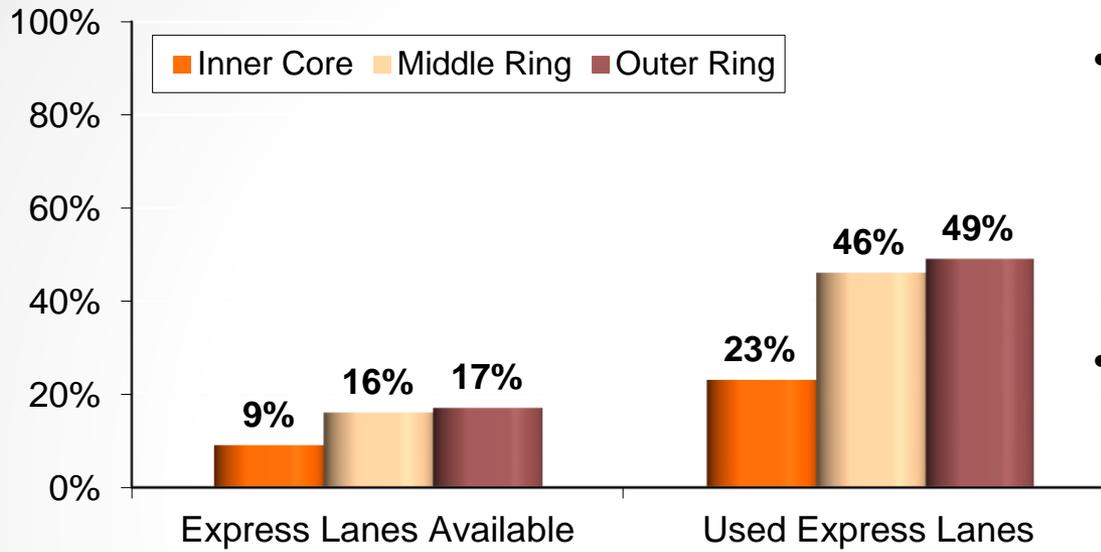
- HOV Lanes: 30% have access; about 1/3 use them
- Express Lanes: 15% have access; more than half use them



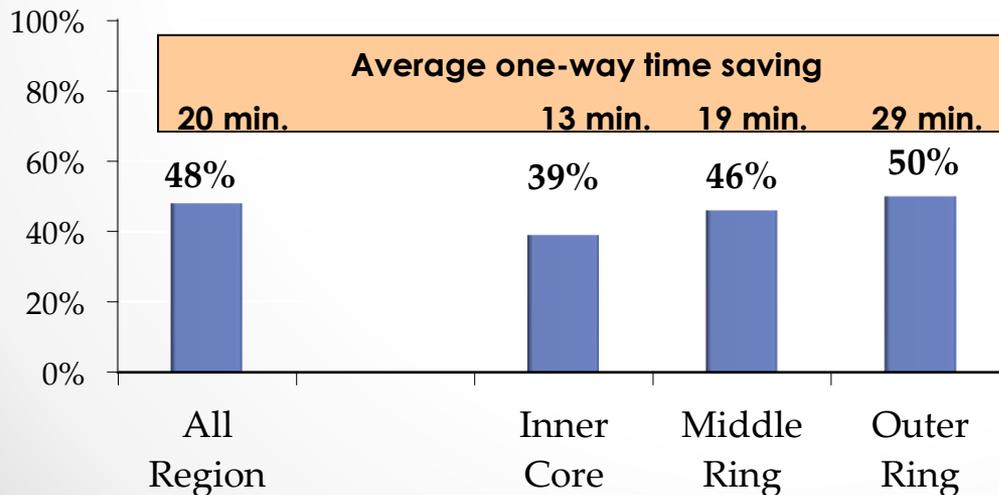
- More commuters in Suburban communities have HOV Lanes Available
- Commuter in Outer Suburbs use HOV lanes at a much higher rate

HOV and Express Lanes Use and Travel Time Savings

Commuter Trips Telework Rideshare Satisfaction Benefits



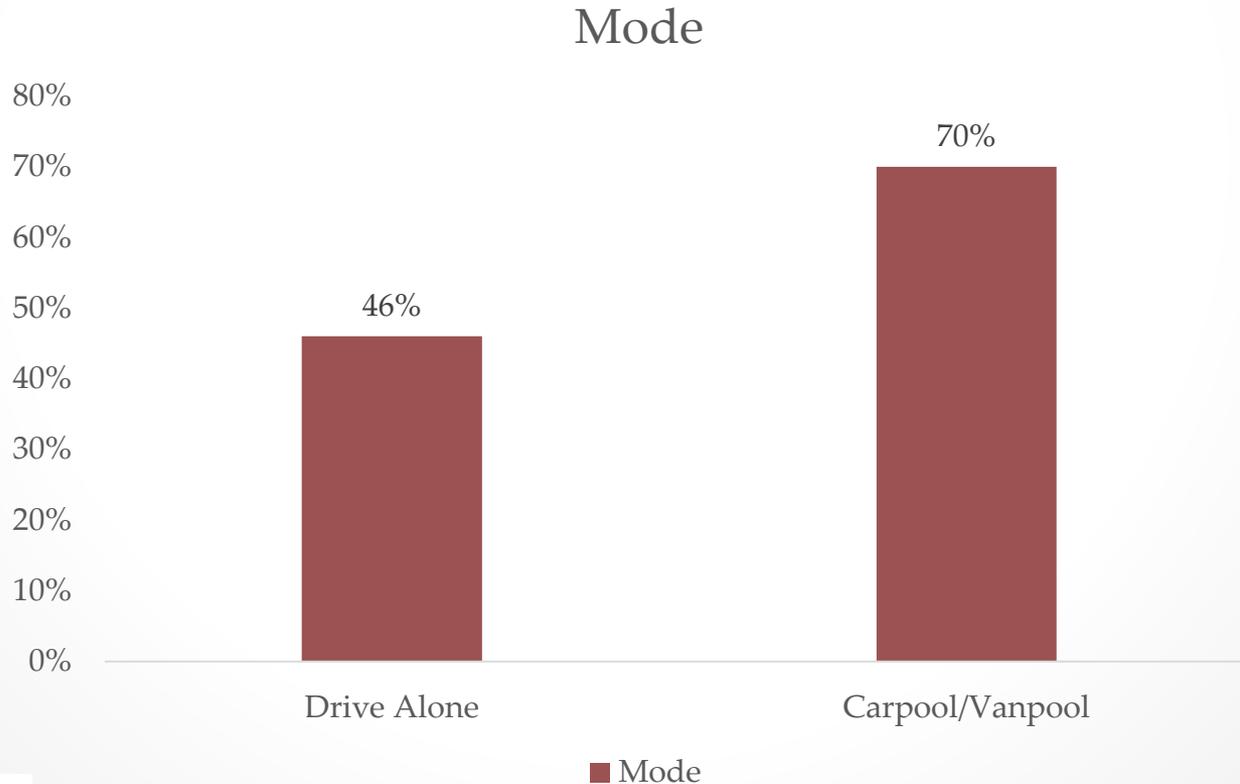
- While fewer commuters have access to Express Lanes than to HOV they use them at a much higher rate when available
- 48% said HOV and Express Lane Availability Influenced their Commute Decisions



- Commuters Who Used HOV/Express Lanes Saved an Average of 20 Minutes on their Commutes

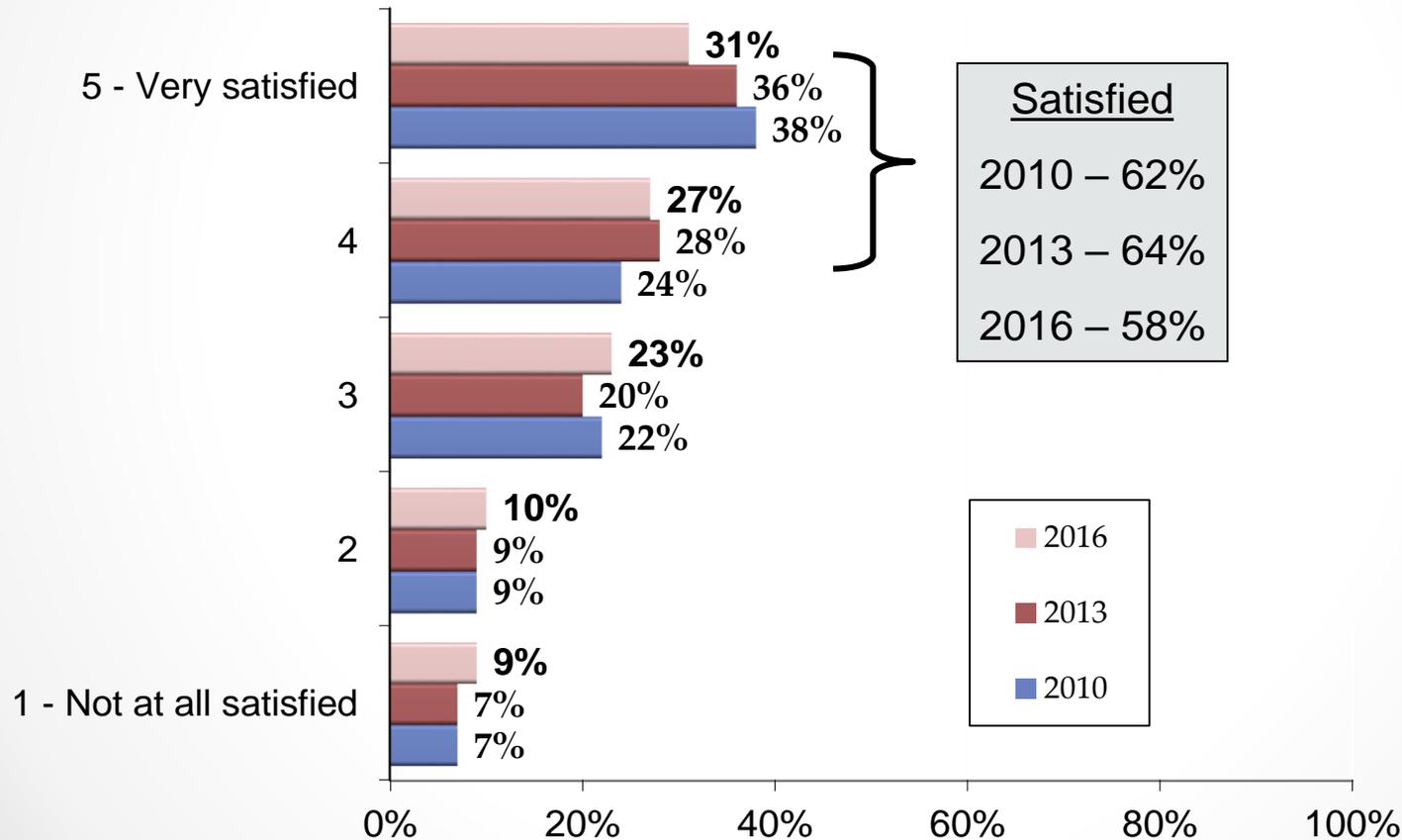
Use of Express Lanes

- Much Higher Share of Carpool and Vanpool vs. Drive Alone Commuters



Overall Satisfaction With Commuting

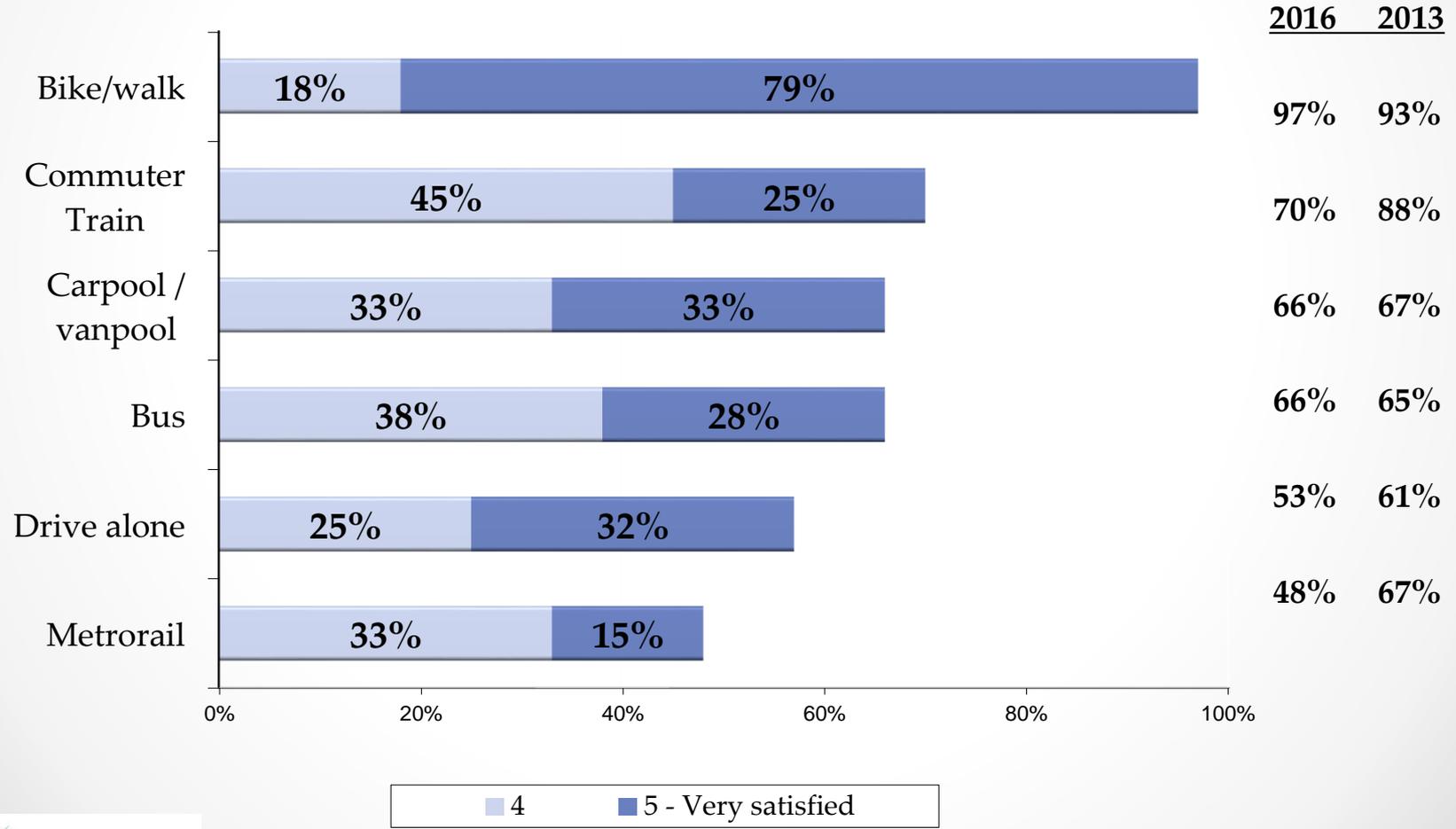
- On average 58% Were Satisfied (less than in previous years)
- Commute Has Gotten Worse in Past Year – 31% satisfied
- Commute Has Gotten Easier in Past Year - 73% satisfied



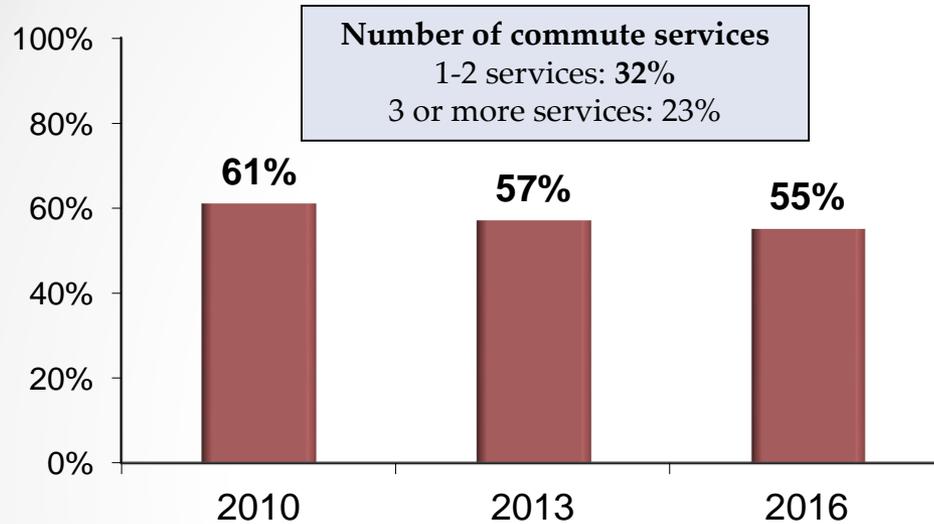
Commute Satisfaction by mode

- Walk/Bike commuters most satisfied
- Metrorail and Commuter train riders least satisfied
- Fewer drive alone commuters satisfied compared to 2013

Benefits
Satisfaction
Rideshare
Telework
Trips

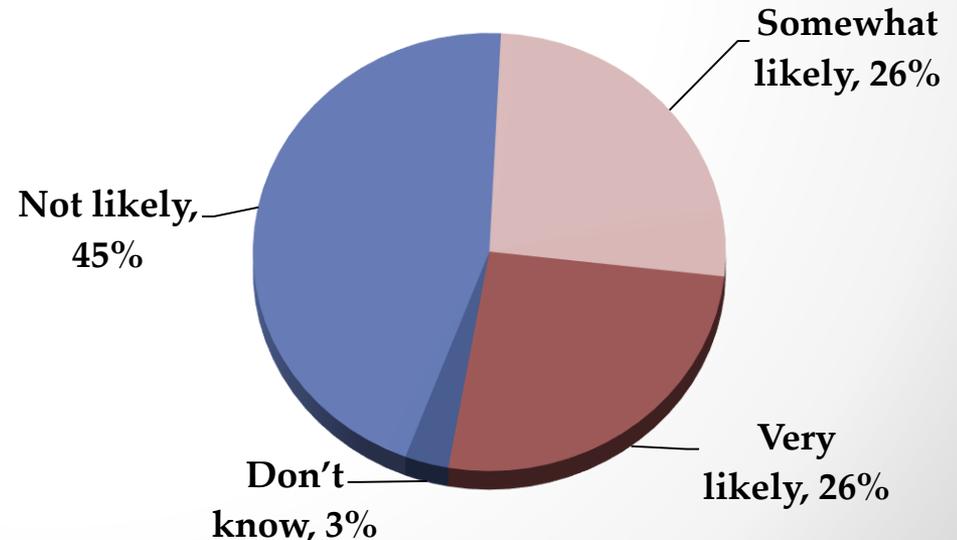


Alternative commute mode benefits



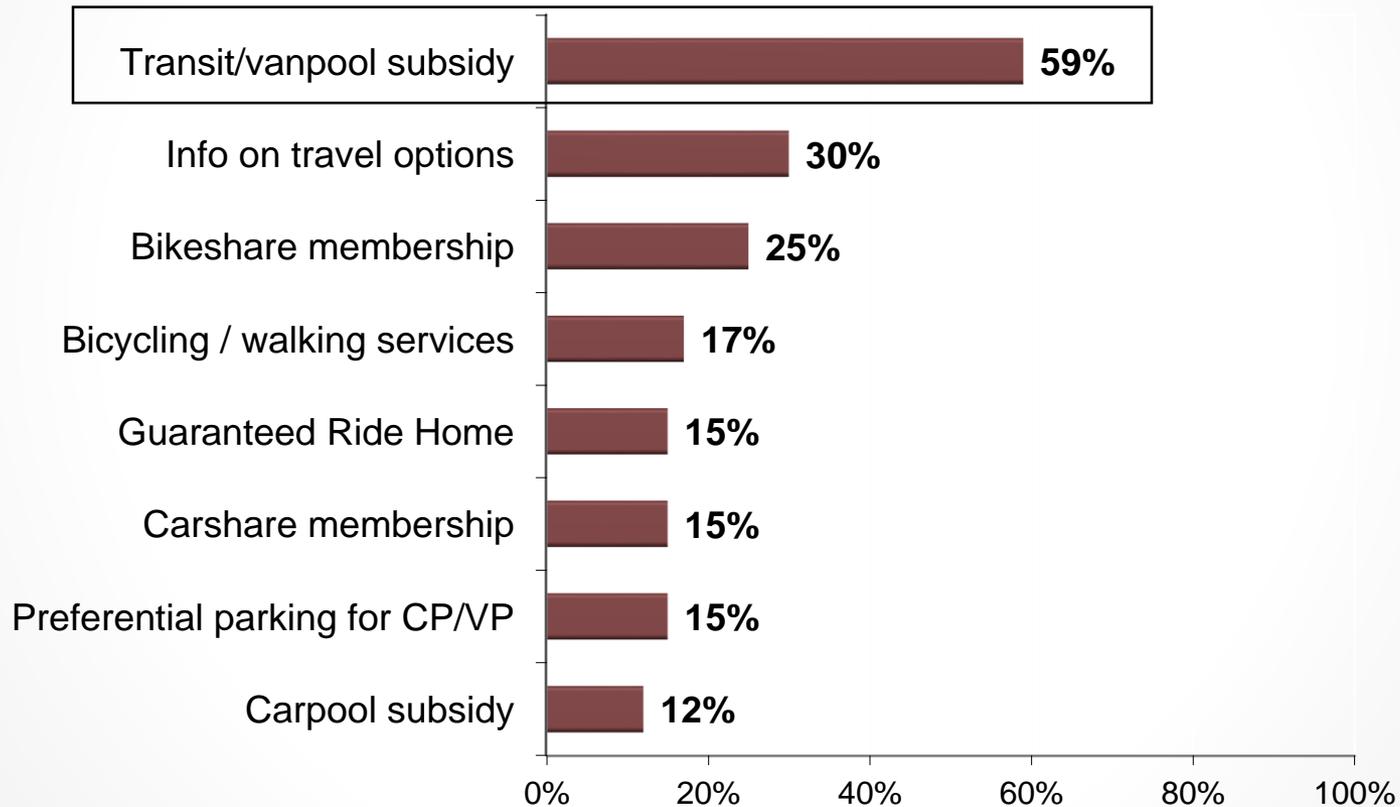
- More than half of commuters have access to employer commute services
- Commute service availability is less today than in 2010

- 60% of Commuters Permitted to “Flex” or Adjust their Work Start/End Times
- About half would consider shifting their work hours outside the peak period to receive a \$3 per day incentive



Alternative commute mode benefits

- **Transit/Vanpool Subsidy widely used when available (59%)**
- **Information on travel options also popular (35%)**



Alternative commute mode personal benefits

Saving money was the leading benefit cited by most commuters

Avoiding stress was the next most often cited benefit

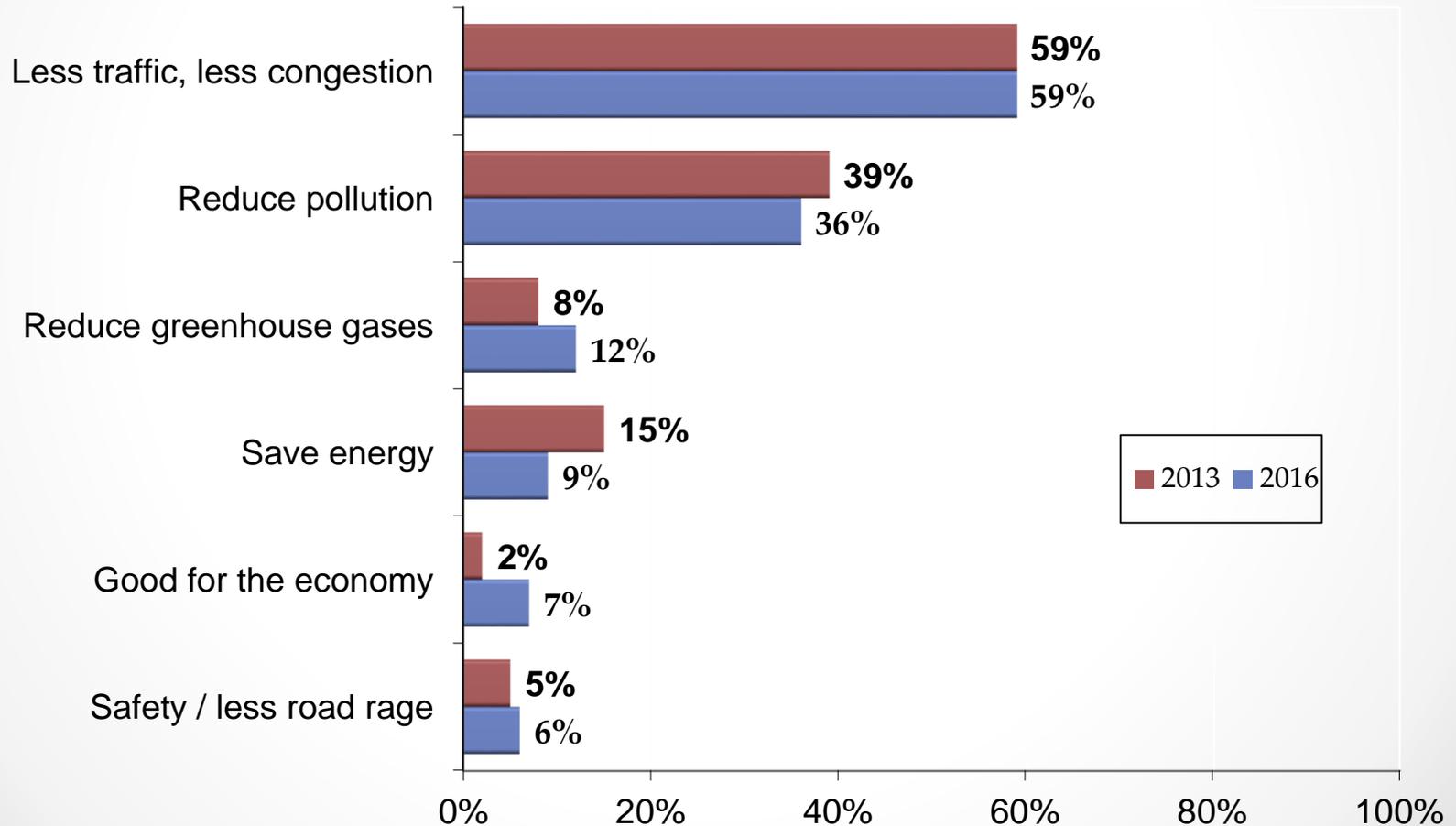
Travel time saving less often cited by transit users relative to carpool/vanpool

| 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% |

Commuter Trips
Telework
Rideshare
Satisfaction
Benefits

Alternative commute mode societal benefits

- Less congestion - leading benefit cited by most commuters
- Economy was cited more often than 3 years ago
- Saving energy was cited less often than 3 years ago



Next Steps

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- Review of Technical Report/Comment Period
- Finalize Technical Report in FY 2017
- Prepare and Publish General Public Report in CY 2017



Nicholas Ramfos

Transportation Operations Programs Director

(202) 962-3313

nramfos@mwkog.org

mwkog.org/TPB

Metropolitan Washington Council of Governments

777 North Capitol Street NE, Suite 300

Washington, DC 20002

