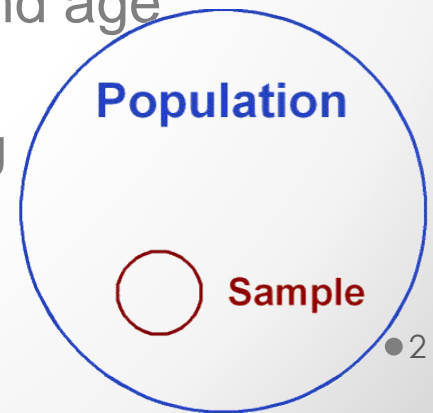




TERM Evaluation Project
2016 State of the Commute Survey
TPB Technical Committee
September 9, 2016

Methodology

- Sixth triennial survey (2001, 2004, 2007, 2010, 2013, 2016)
- Telephone 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
- 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 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

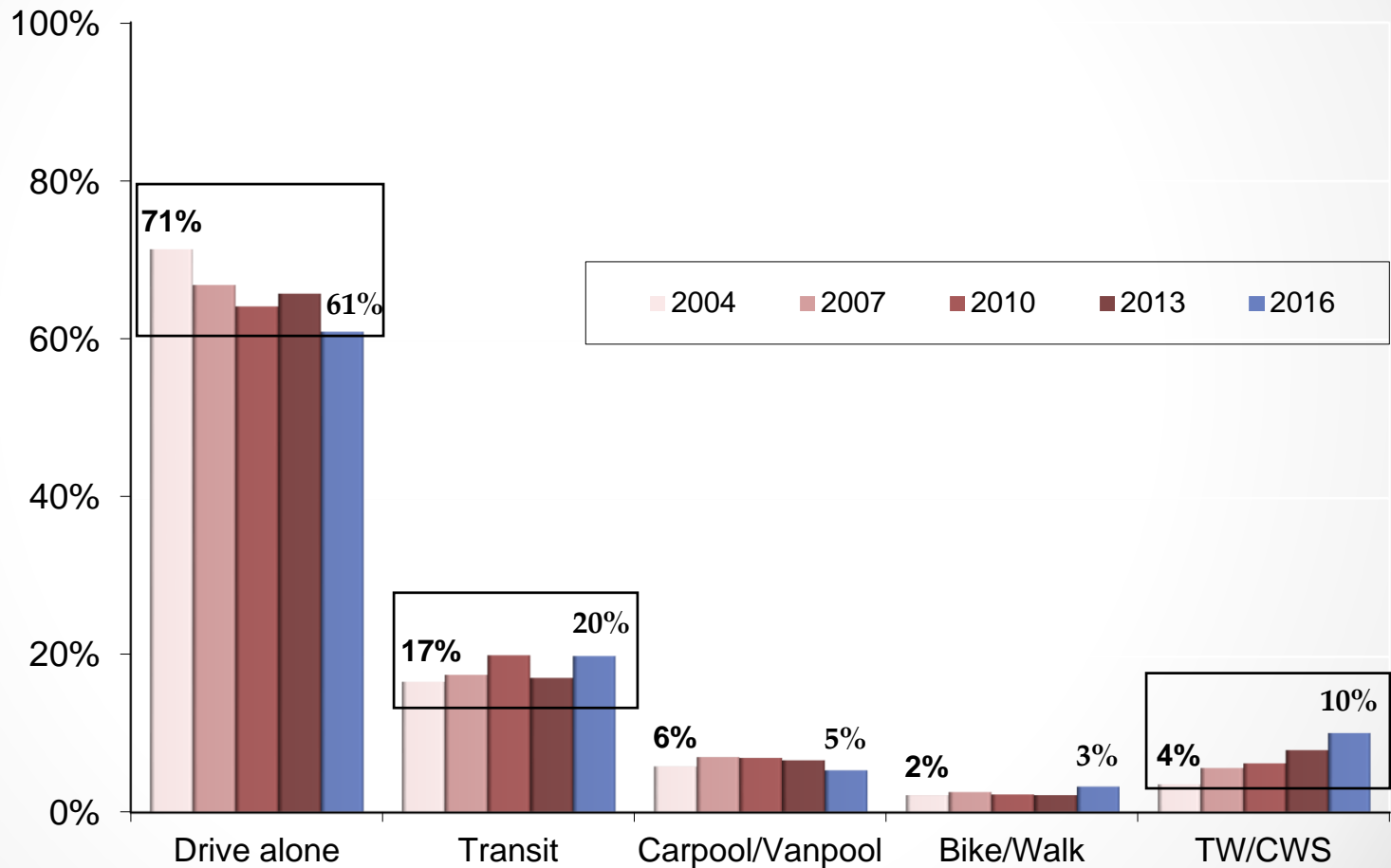


Preliminary Highlights

- Commute Patterns
- Telework
- Travel Facilities
- Commute Ease and Satisfaction
- Awareness of Commuter Connections
- Employer Services

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

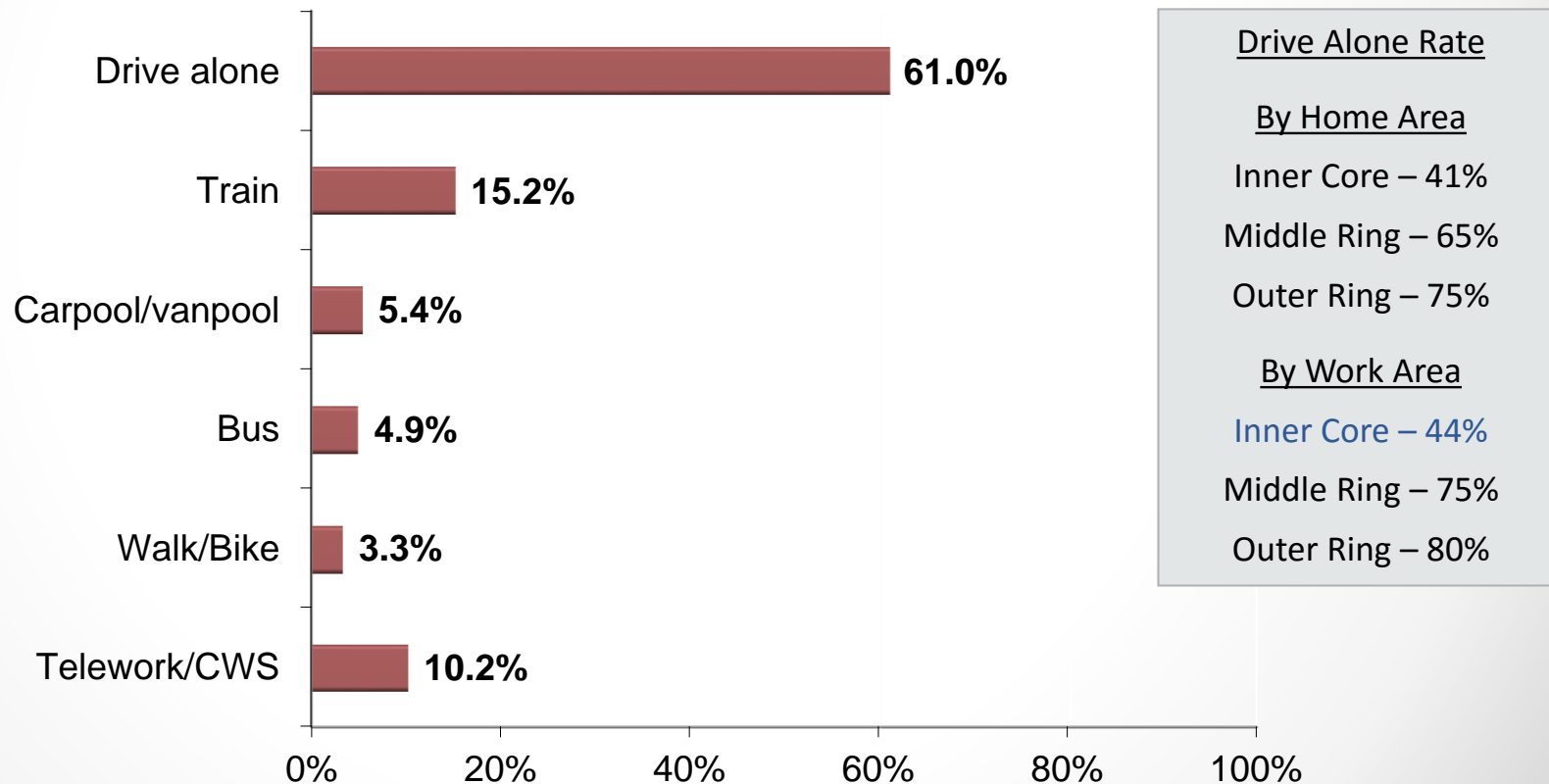
2013 SOC
n = 5,892

2016 SOC
n = 5,503

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

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

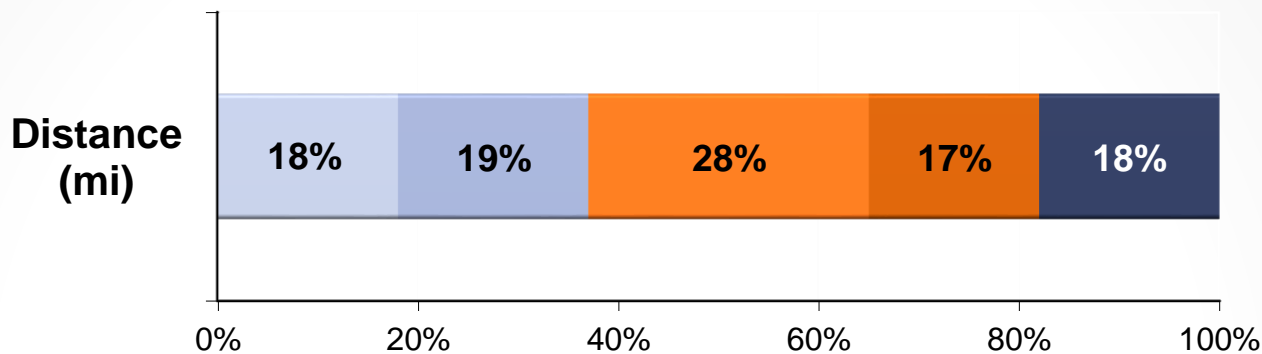


2016 SOC
n = 5,503

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

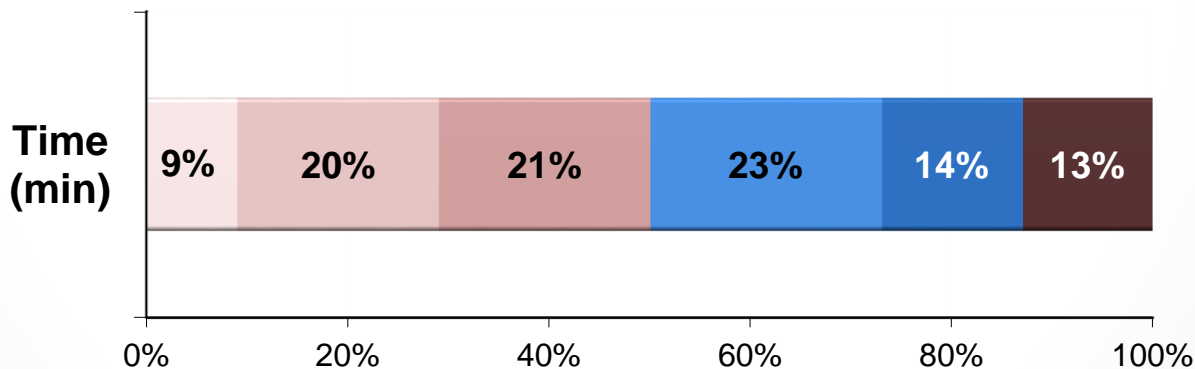
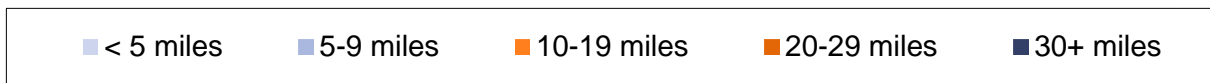
In 2016, Commuters Traveled 17.3 Miles and 39 Minutes One-way to Work

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

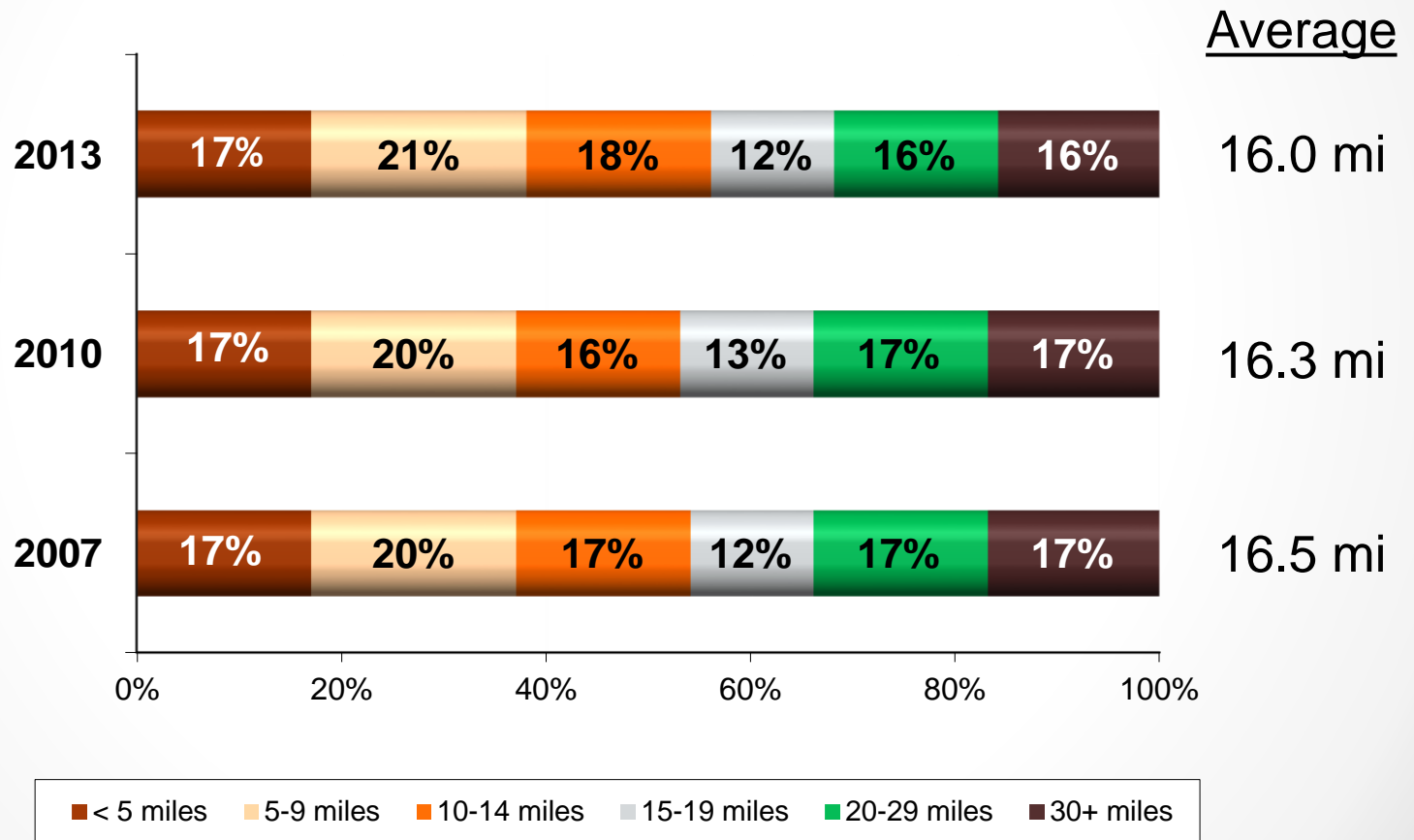
Time
2010 - 36 min
2013 - 36 min

2016 SOC

Distance
n = 4,766

Time
n = 5,036

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



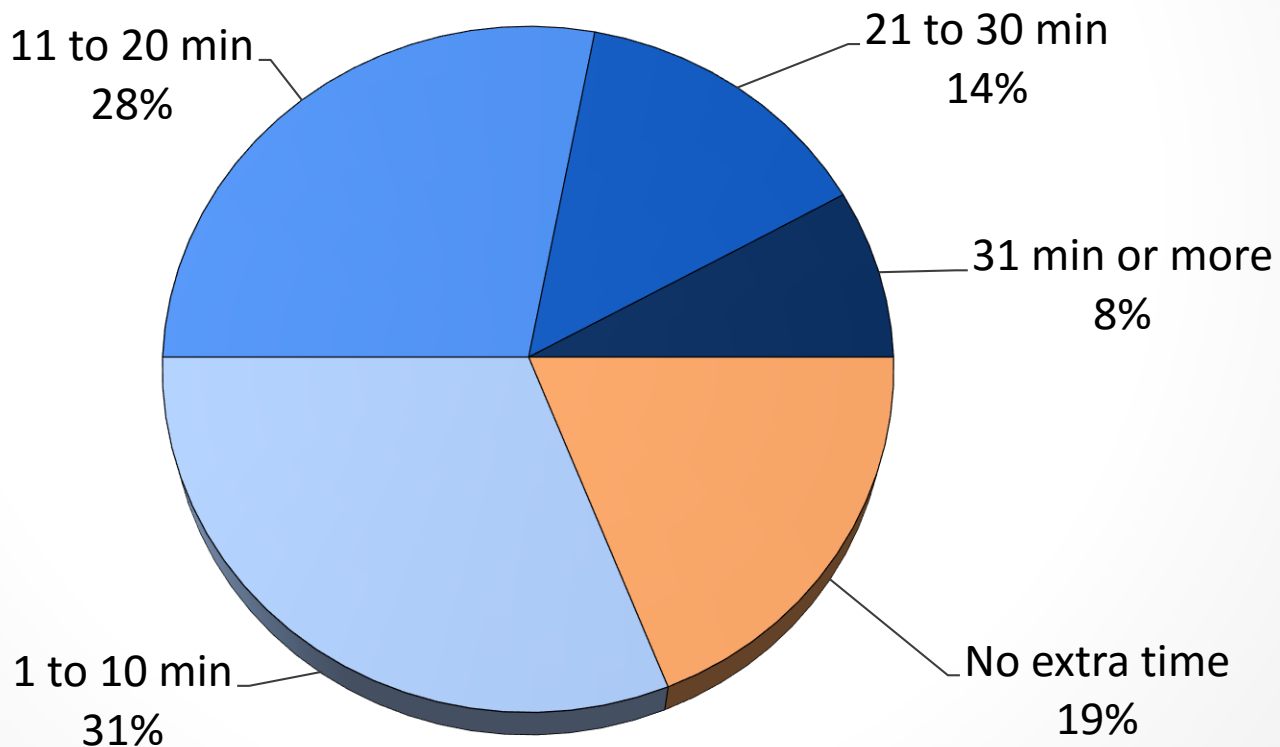
2013 SOC
 n = 5,122

2010 SOC
 n = 5,533

2007 SO 2007 C
 n = 5,465

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



2016 SOC
n = 4,995

Q16a How many extra minutes do you build into your typical commute time to ensure that you nearly always arrive at work on time

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. Telework frequency was 1.4 days/week

2001 SOC
n = 6,924

2004 SOC
n = 6,851

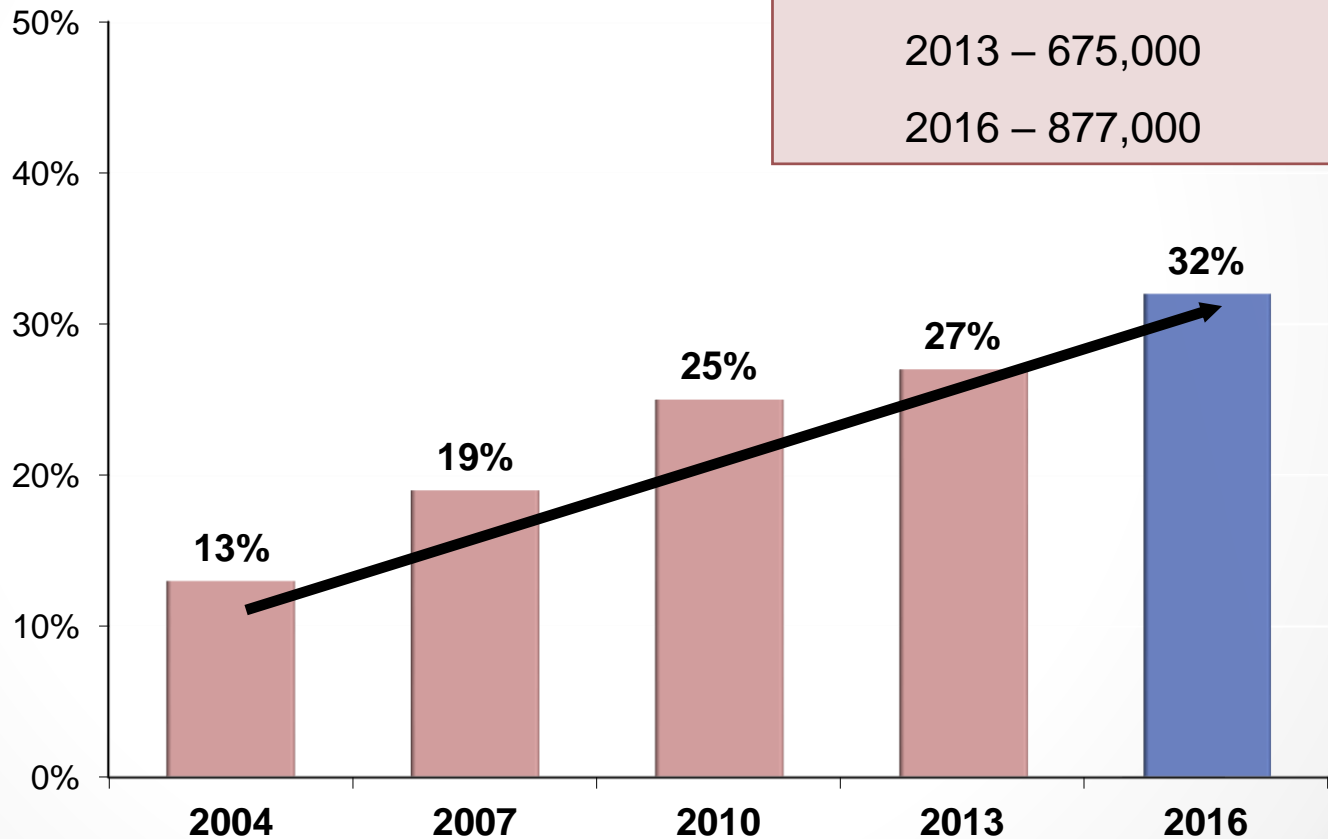
2007 SOC
n = 6,168

2010 SOC
n = 6,050

2013 SOC
n = 5,892

2016 SOC
n = 5,503

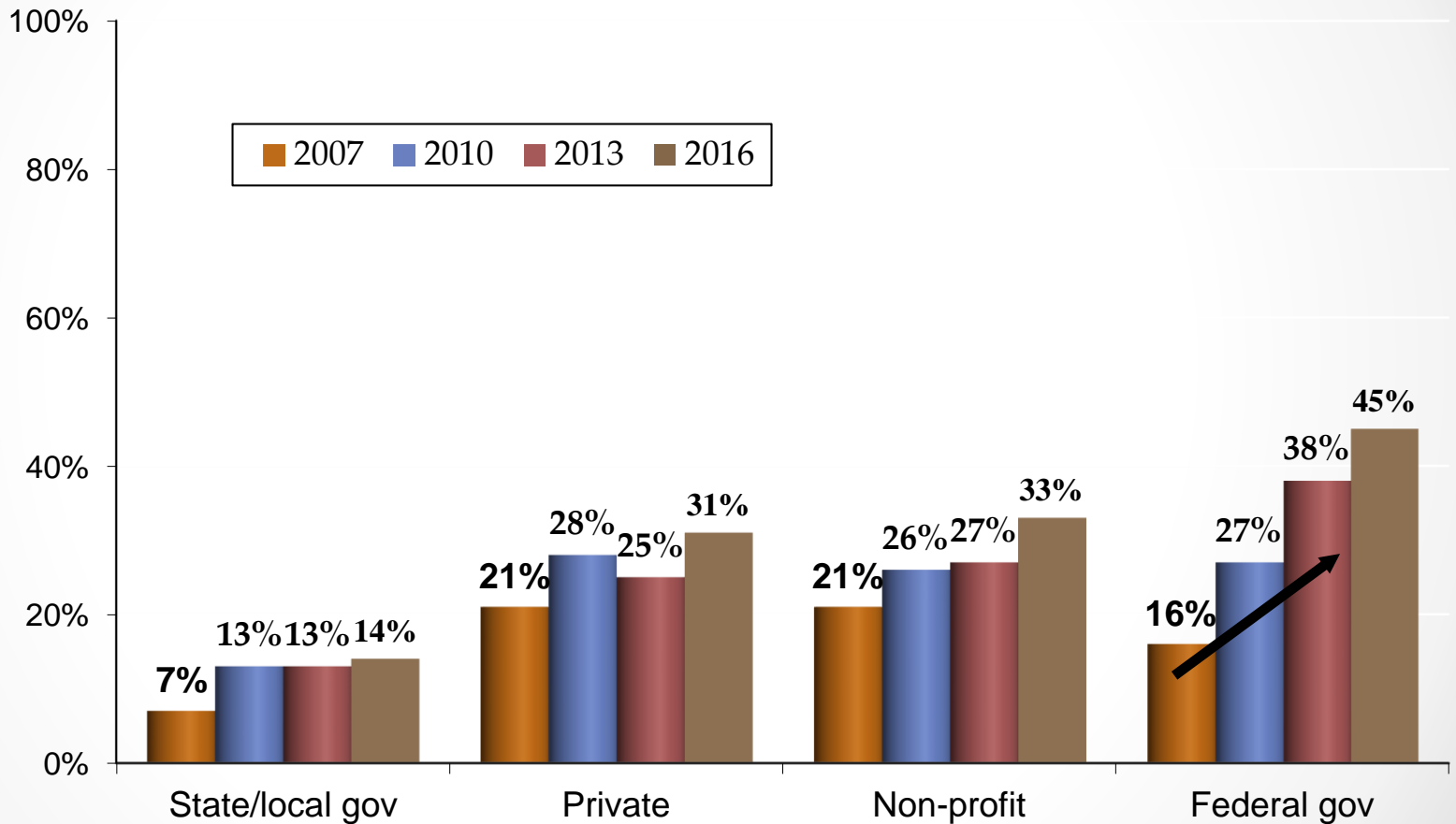
Excludes workers who are self-employed and work only at home



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?

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 45% in 2016



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

2016 SOC

State/local n = 688
 Private n = 2,487
 Non-profit n = 647
 Federal n = 1,352

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?

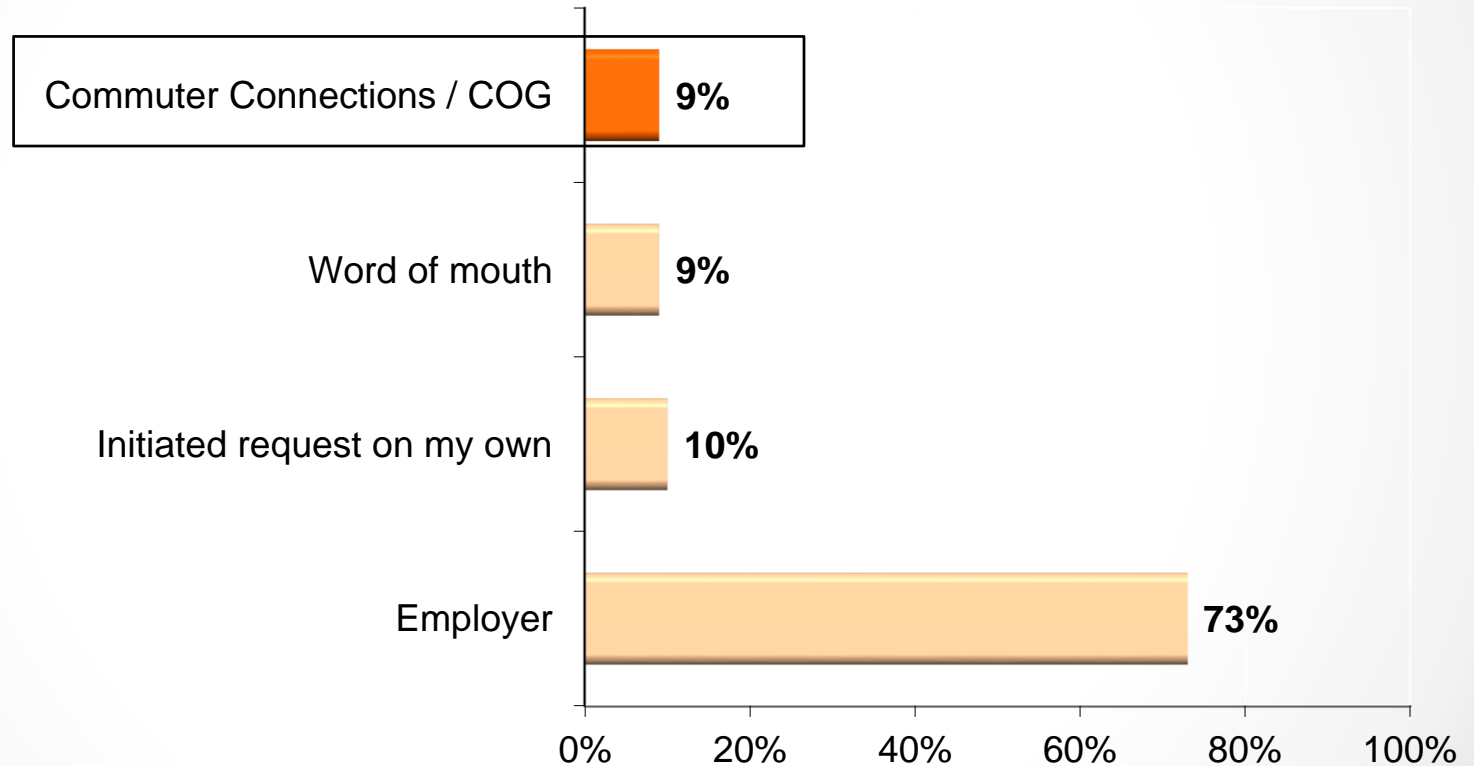
Work Schedule Arrangements in 2016 are Very Similar to 2013



	<u>2016 SOC</u>	<u>2013 SOC</u>
■ Work full-time	86%	85%
■ Self-employed	5%	6%
■ Average assigned days	4.9	4.9
■ Average travel days	4.5	4.5
■ Work compressed schedule	7%	7%
■ Telework	<u>32%</u>	27%
■ Full-time telework	3%	3%
■ Average TW frequency	<u>1.4 d/wk</u>	1.4 d/wk

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?

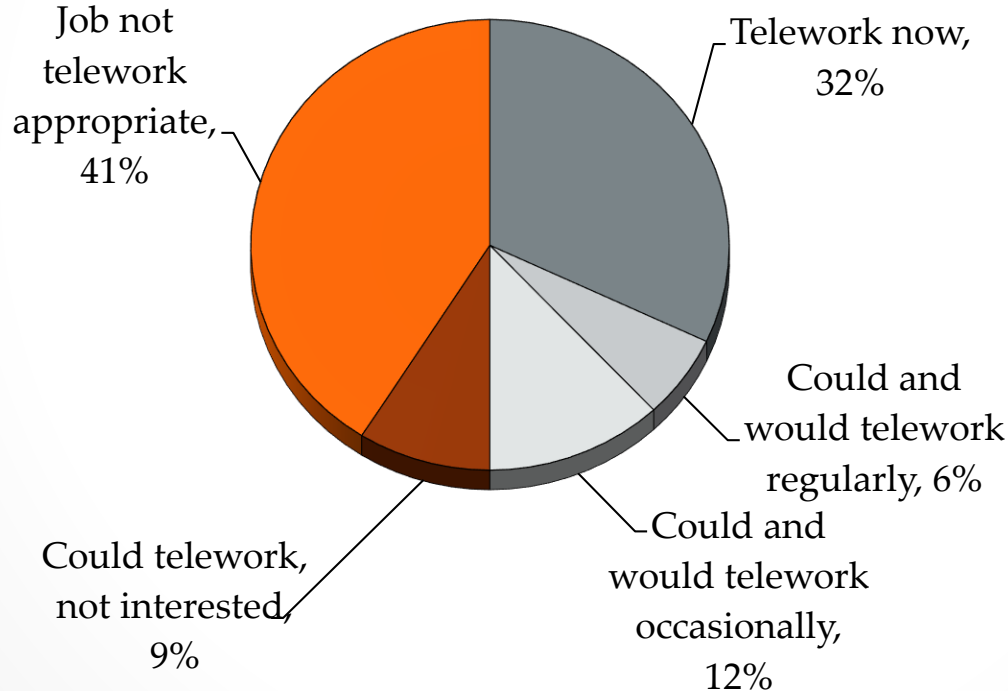
Q43 Did you receive any information about telecommuting from Commuter Connections or from the Telework Resource Center at the Council of Governments?

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



887,000 current teleworkers
518,000 “could and would” telework

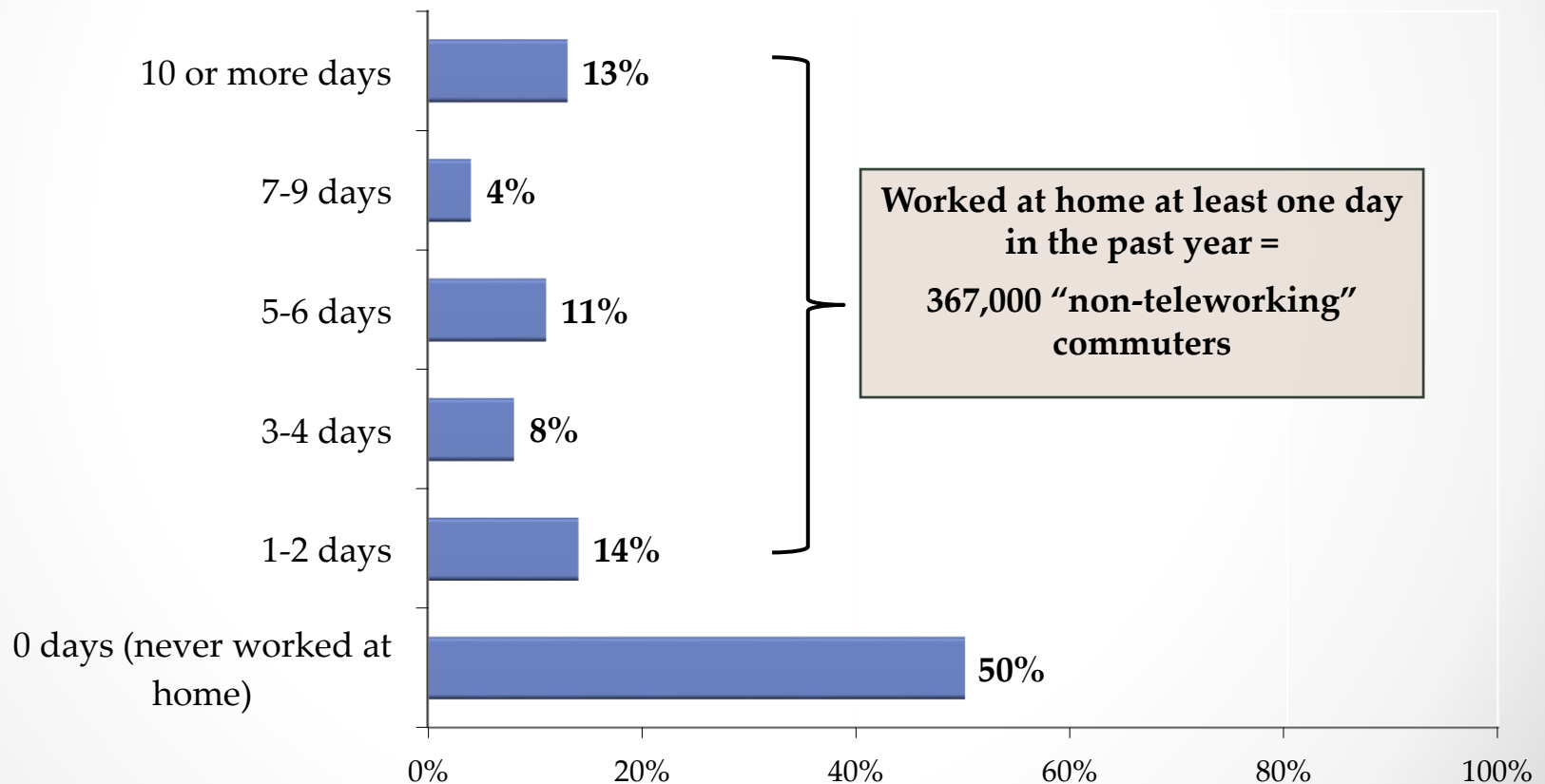
Q14e Would your job responsibilities allow you to work at a location other than your main work place at least occasionally?

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)

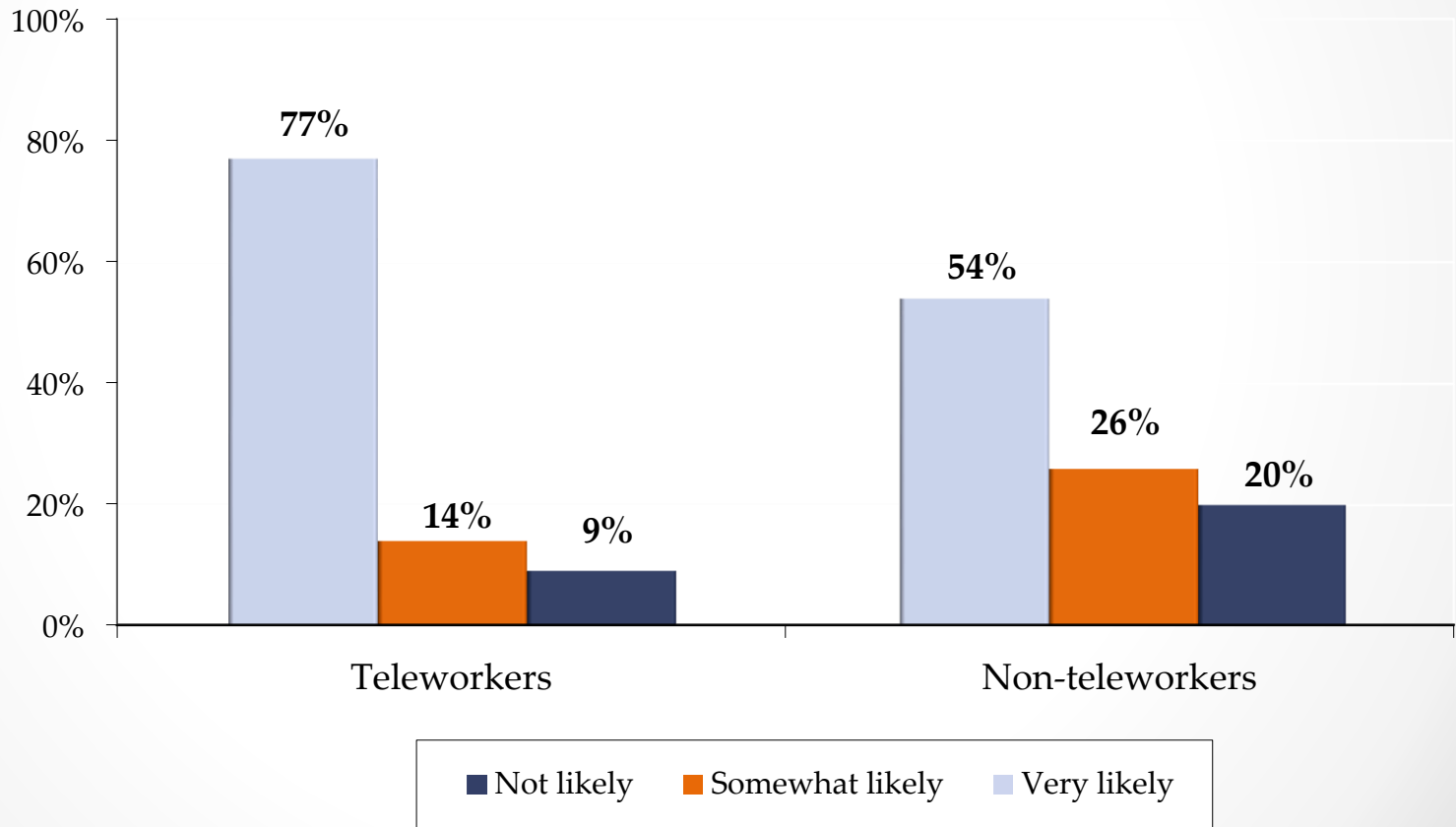
Non-teleworking commuters who have telework-appropriate jobs
n = 1,353



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

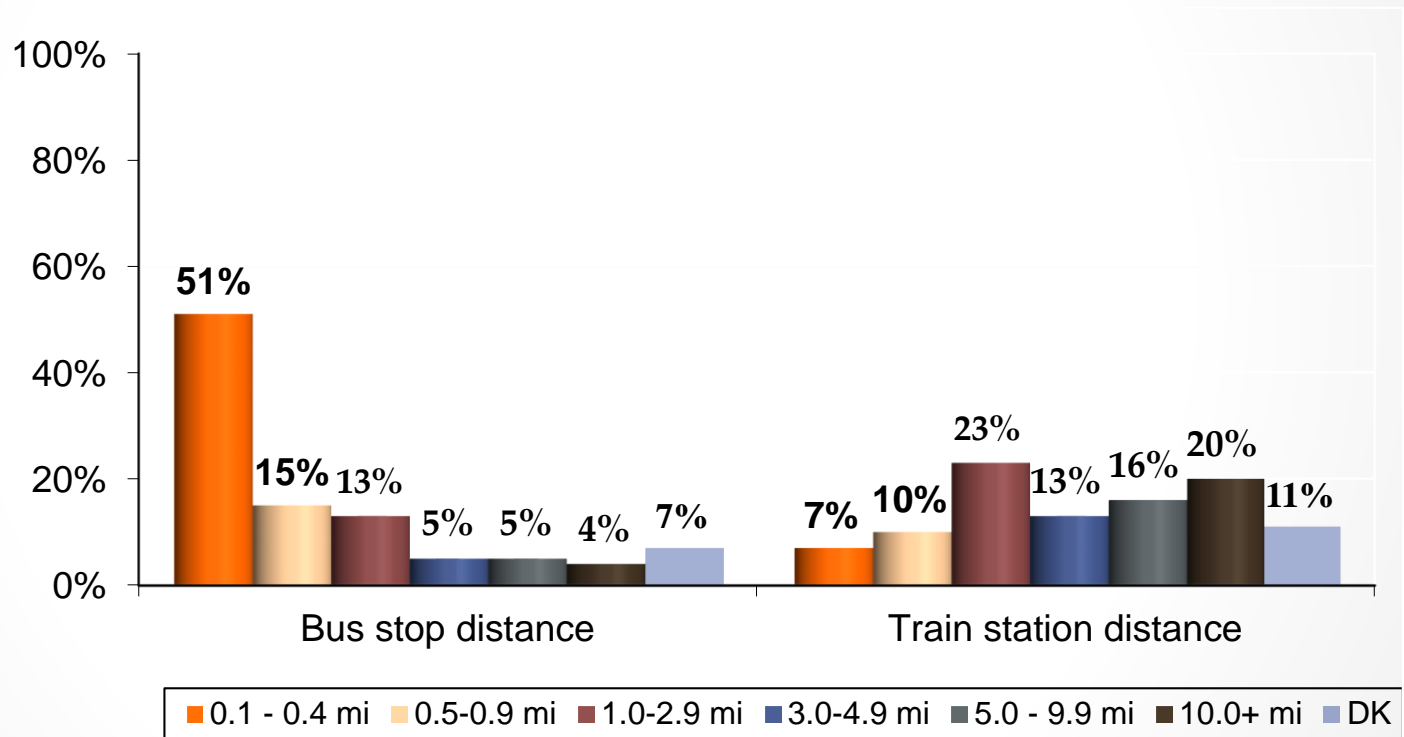
So TW likely has a greater impact than “typical week” use would suggest



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?

51% of Respondents Live Less than 1/2 Mile from a Bus Stop and 66% Live Less than 1 Mile

Train station access is less convenient; only 17% live less than 1 mile from a train station. These percentages are the same from 2013.



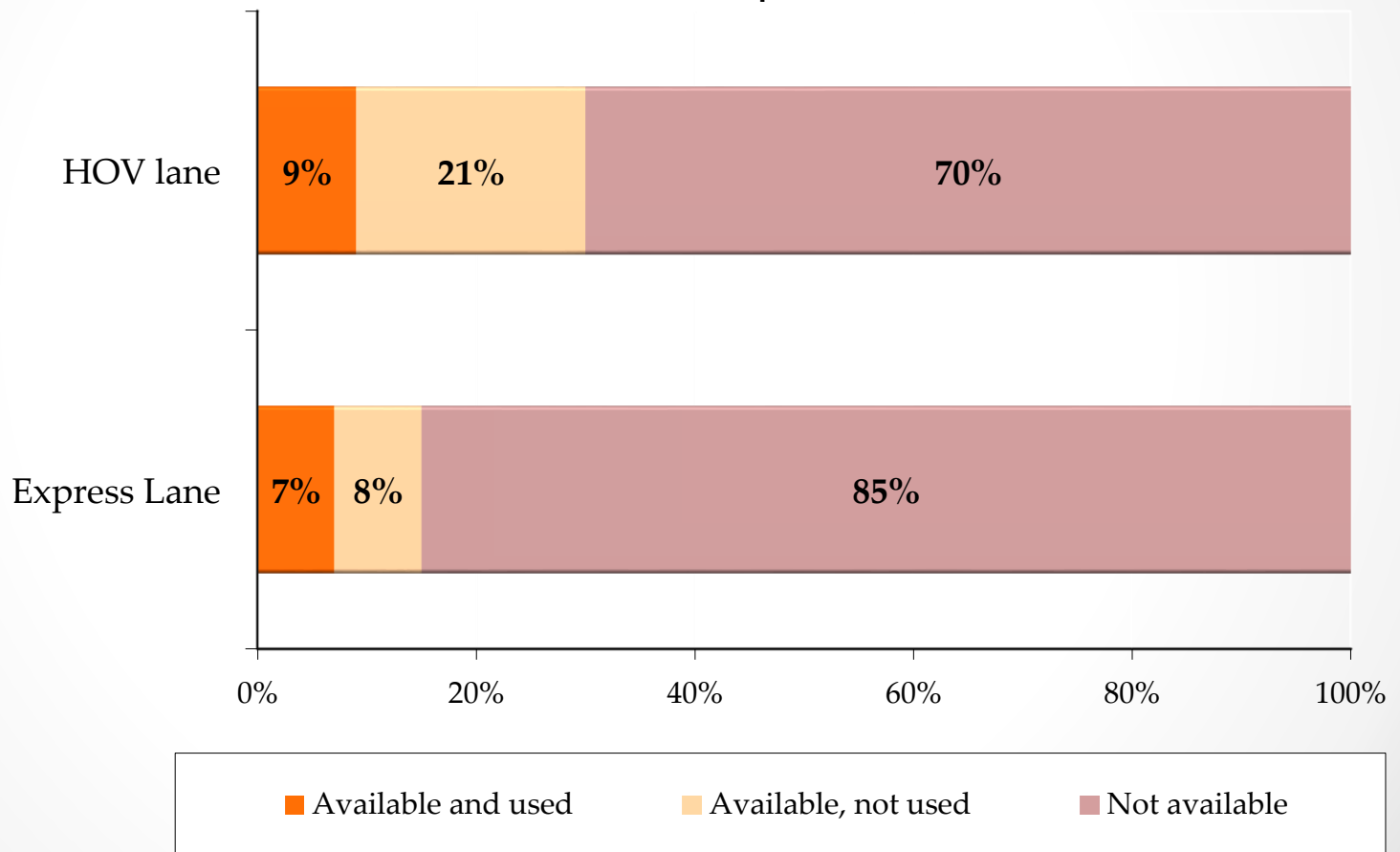
Bus distance
n = 5,238

Train distance
n = 5,239

Q44a About how far from your home is the nearest bus stop?
Q44b How far from your home is the nearest train station?

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



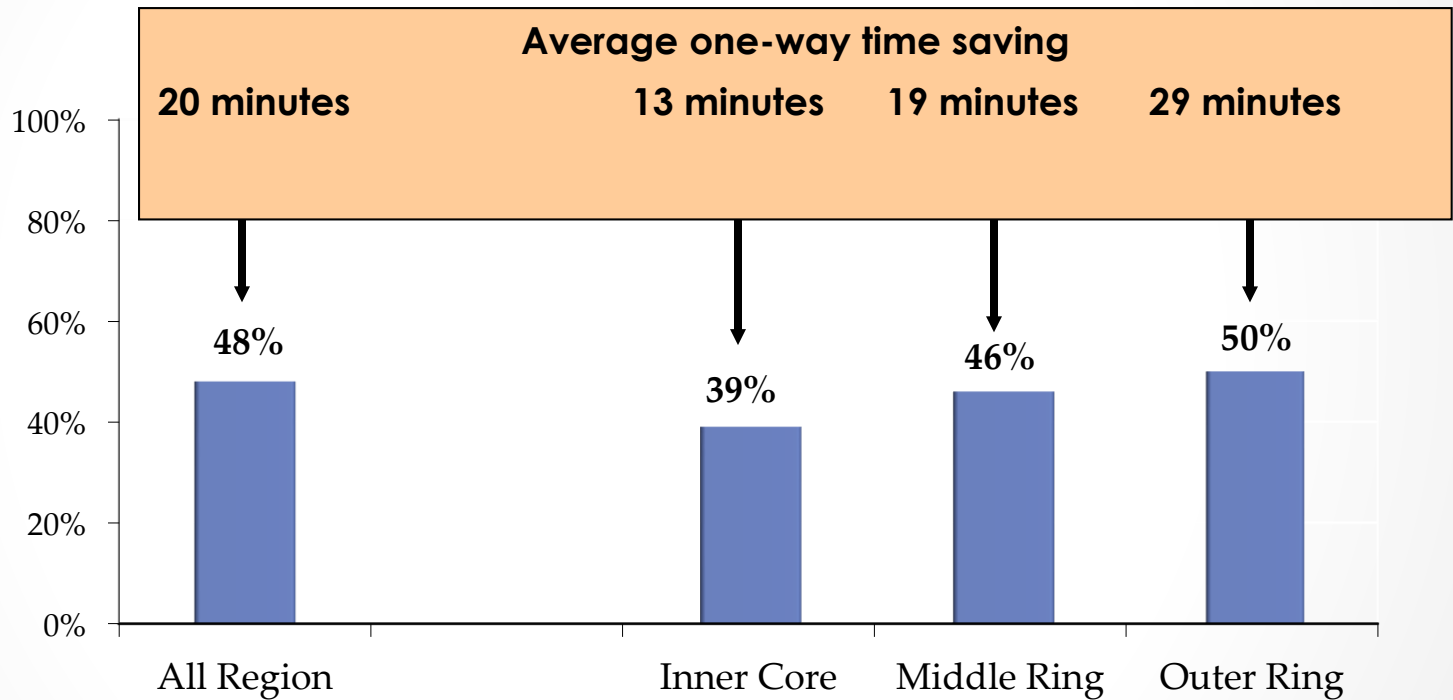
Q46 Is there a special HOV (High Occupancy Vehicle) lane along your route to work?

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



Percentage whose mode choice was influenced by lane availability

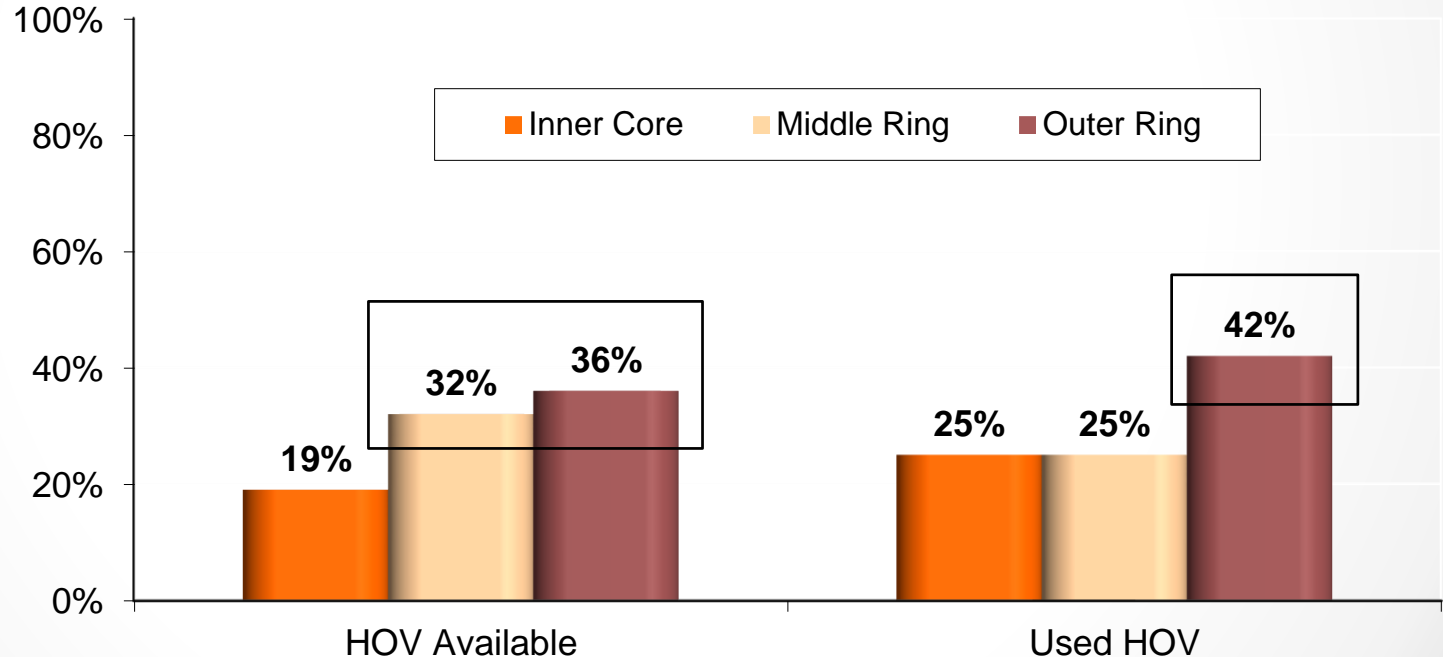
Q50 How much time does the HOV or express lane save you in your one-way trip to or from work?
Q51 Did the HOV/Express lane influence your decision to use your current way of commuting?

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

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

HOV lane available
Core
 n = 1,468
Middle Ring
 n = 1,486
Outer Ring
 n = 2,285

Use HOV lane
Core
 n = 382
Middle Ring
 n = 458
Outer Ring
 n = 678



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 Express Lanes Available

“Middle and Outer Ring” commuters use Express Lanes at a very high rate when they are available

Express Lane available

Core

n = 1,468

Middle Ring

n = 1,486

Outer Ring

n = 2,285

Use Express Lane

Core

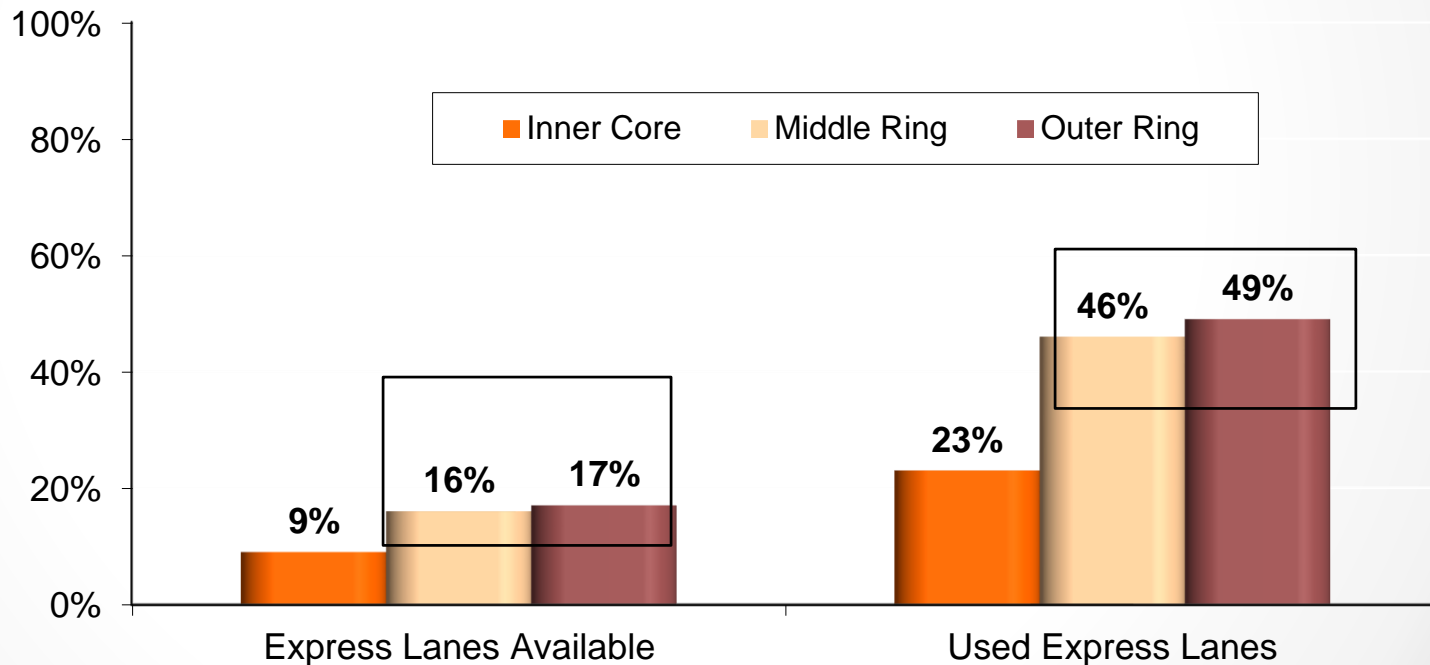
n = 162

Middle Ring

n = 233

Outer Ring

n = 3078



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?

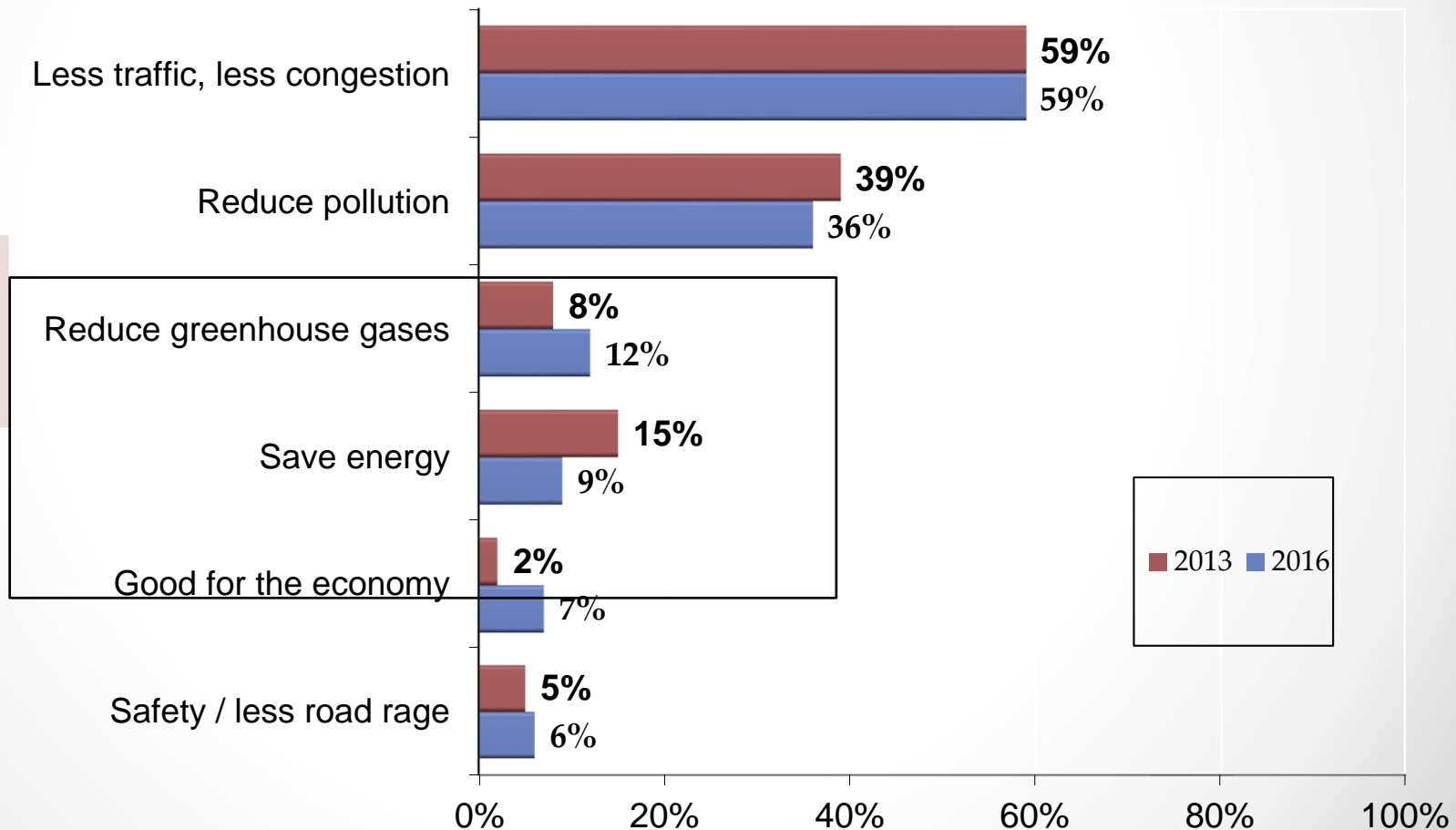
Q47 Do you ever use the HOV lane to get to or from work?

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



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

All
commut
ers
n =
1,555

Carpool/
Vanpool
n = 283

Bus n =
288

Train n =
692

Bike/Wal
k n =
180

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%

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 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%

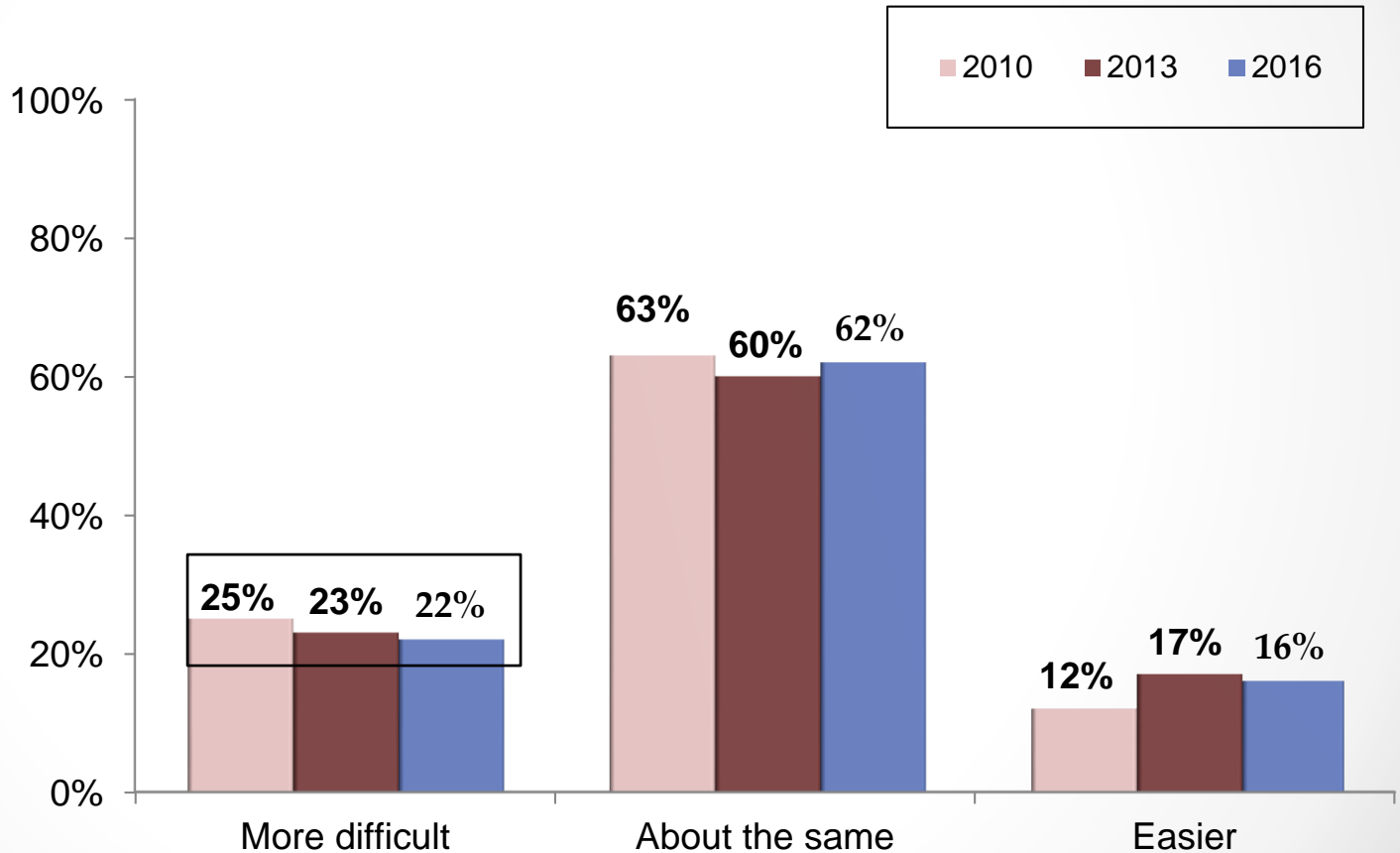
Outer Ring – 24%

By Work Area

Inner Core – 25%

Middle Ring – 21%

Outer Ring – 16%



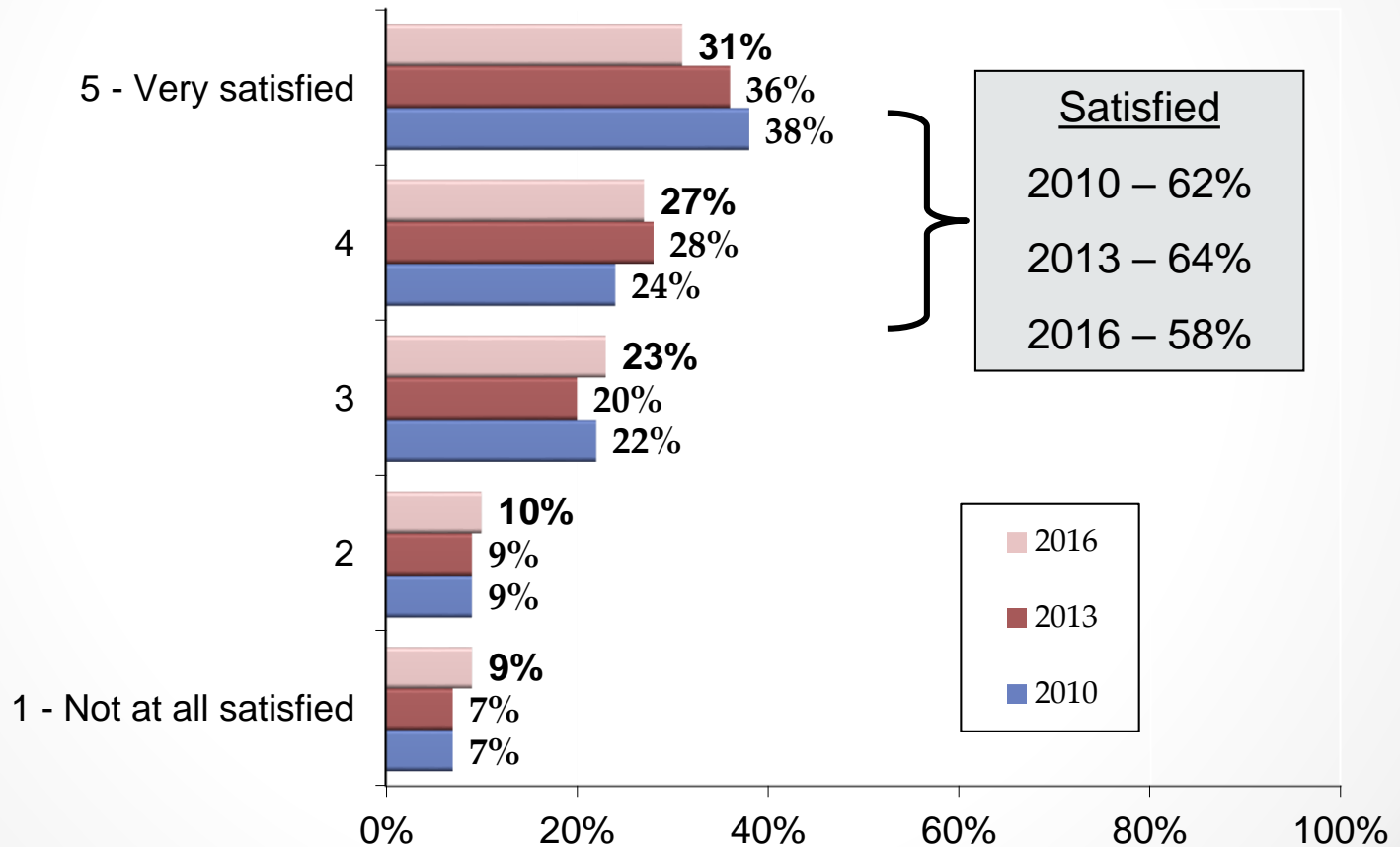
2016
n = 5,142

2013
n = 5,717

2010
n = 6,049

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

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

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

Bike/walk
n = 180

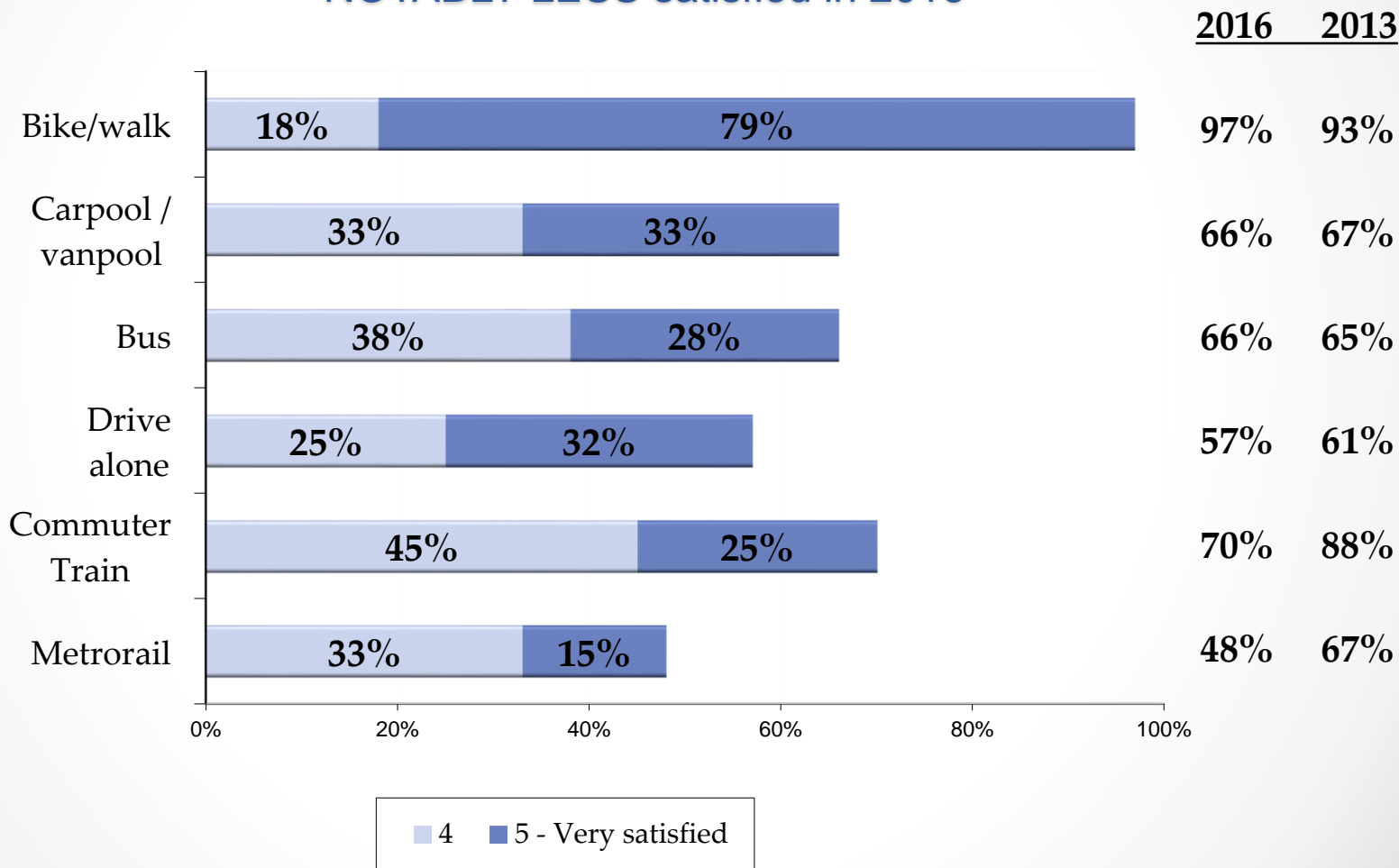
Commuter Train
n = 62

Carpool/van pool
n = 283

Bus
n = 284

Drive alone
n = 3,552

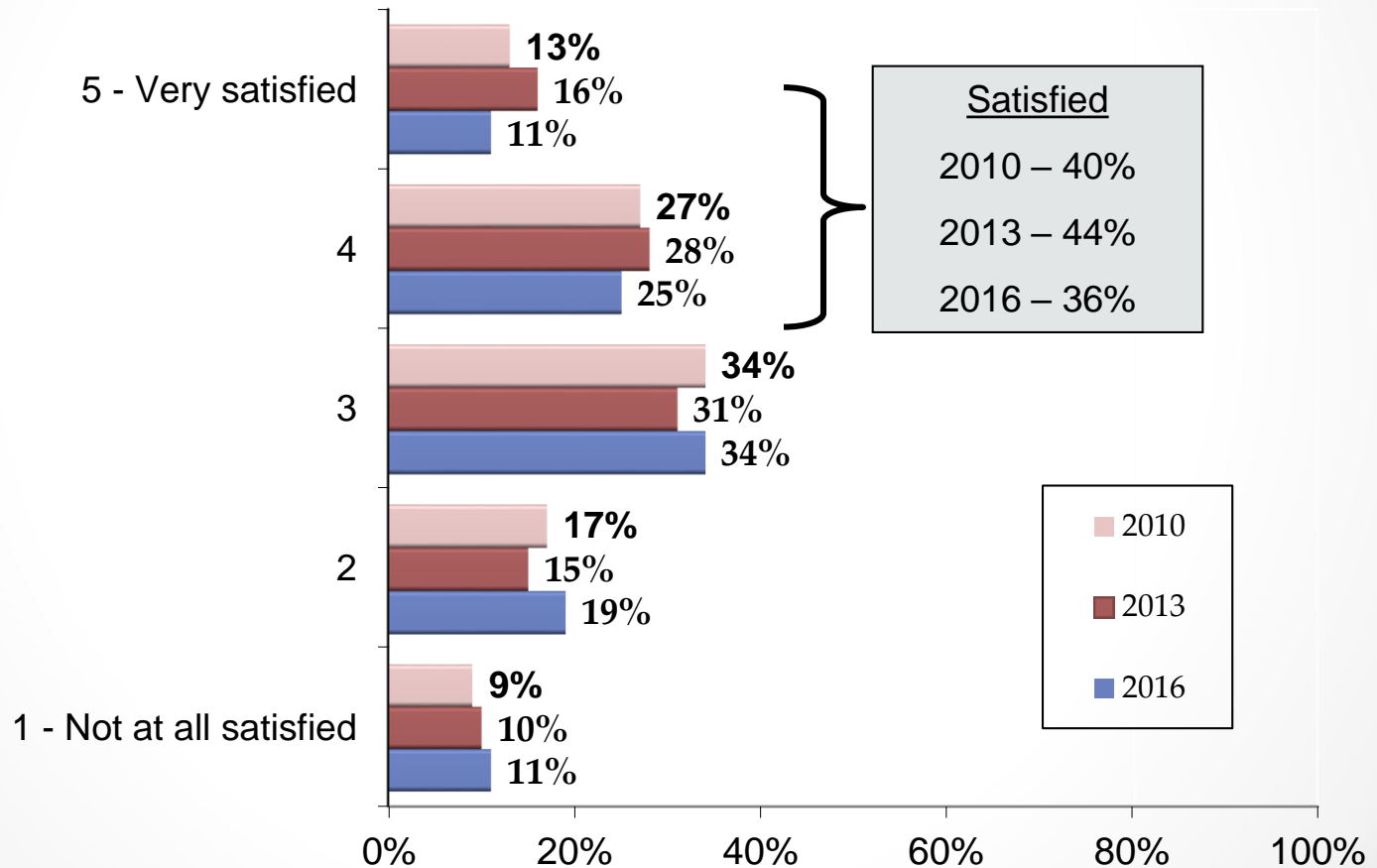
Metrorail
n=634



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?

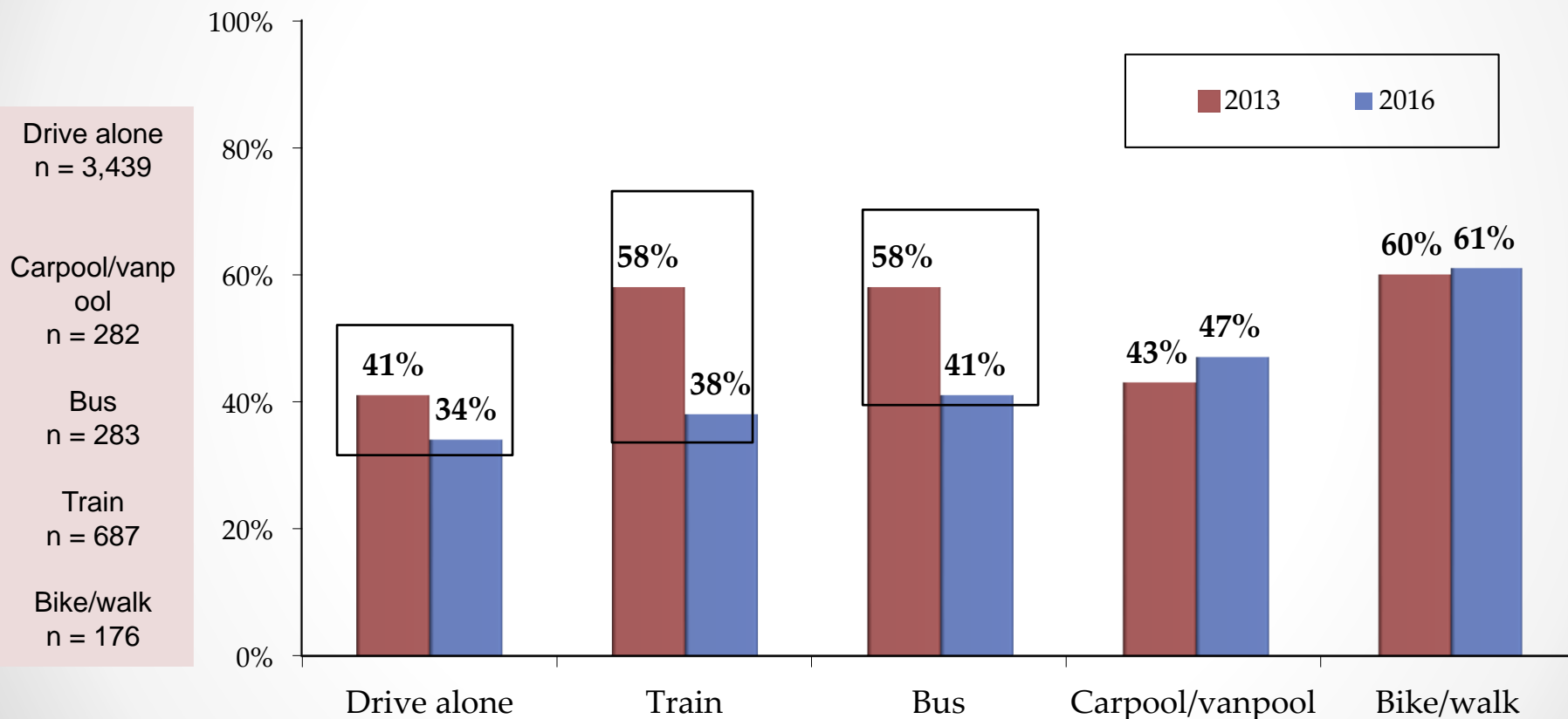
Commuters Were Less Satisfied with Transportation in 2016 than in 2013 or 2010

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



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

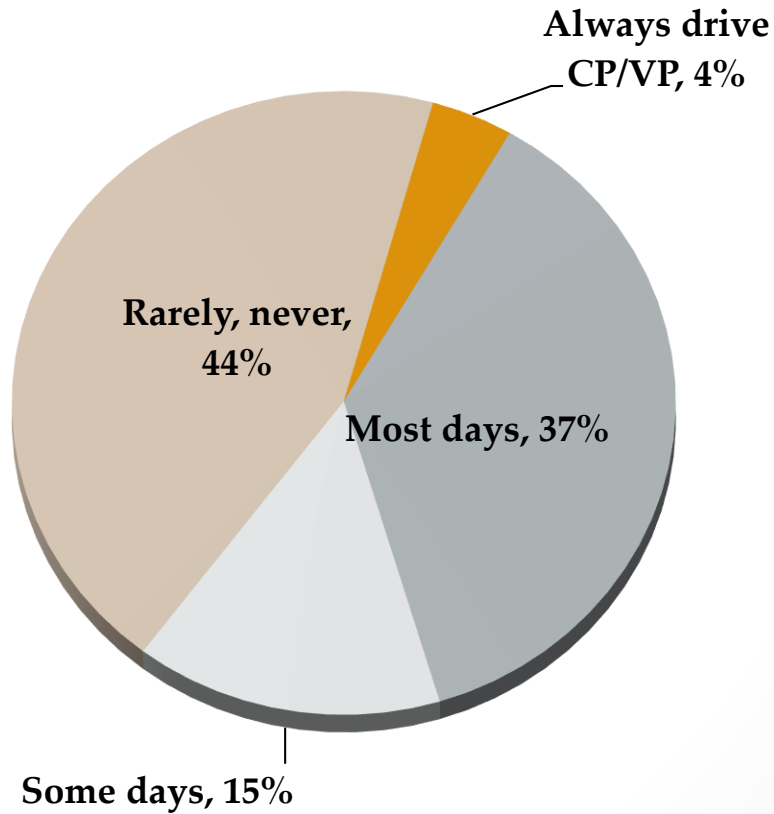


Half of Commuters who Used Alternative Modes Performed Work-related Tasks During their Commute at Least Some Days

37% performed work-related tasks “most days”

Work Related Tasks at Least Some Days
By Mode

- Bus – 59%
- Train – 57%
- Carpool – 30%



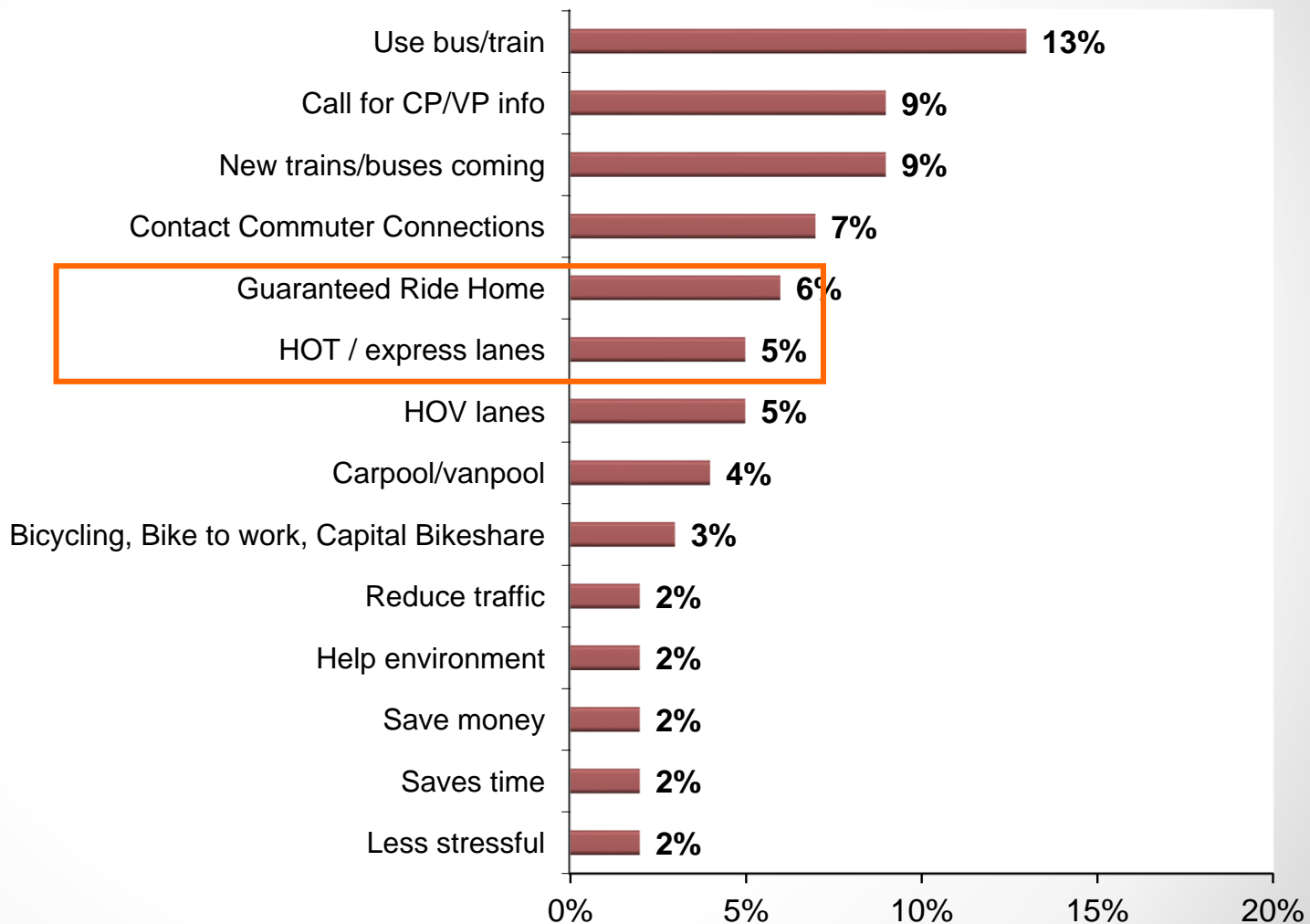
2013
n = 1,349

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?

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



n = 3,733

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.

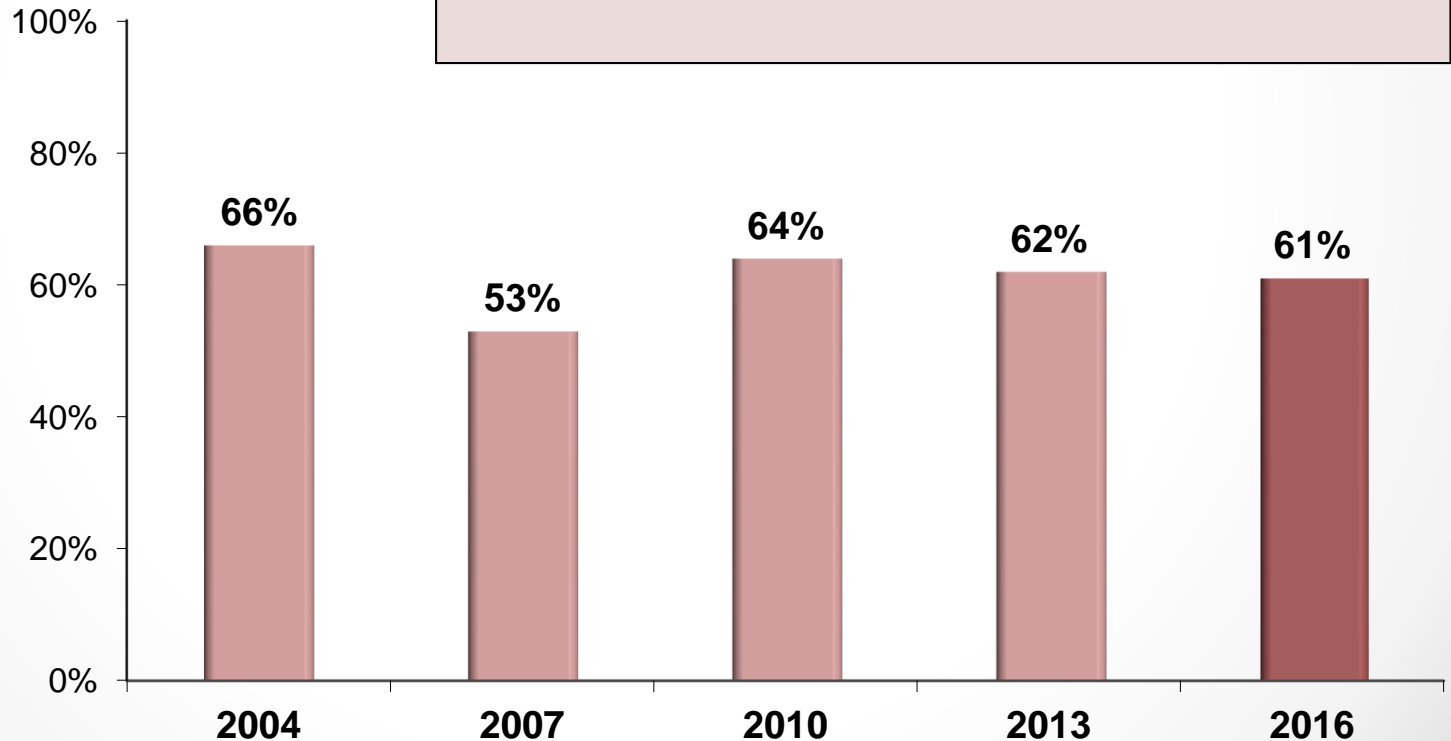
2004 SOC
n = 7,200

2007 SOC
n = 6,600

2010 SOC
n = 6,629

2013 SOC
n = 6,335

2016 SOC
n = 5,903



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

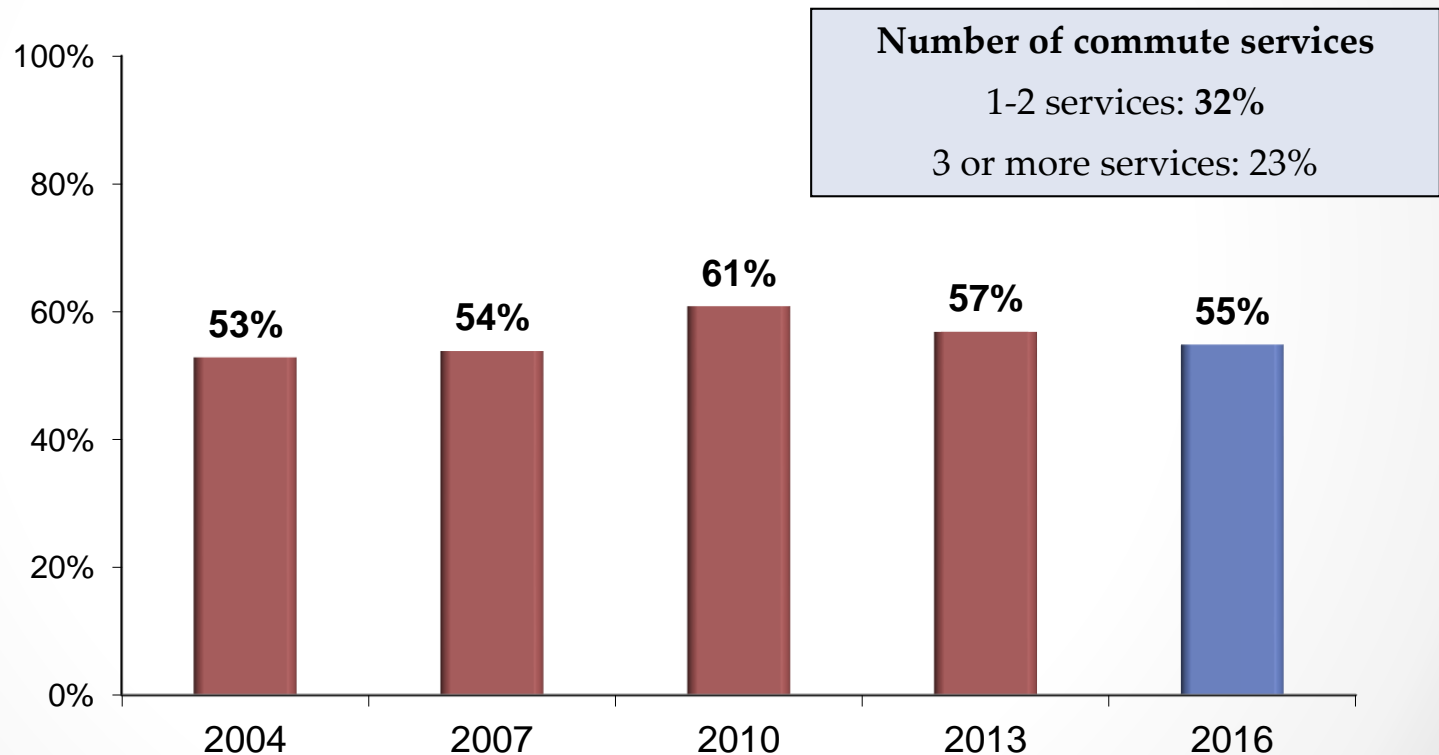
2004 SOC
n = 6,866

2007 SOC
n = 6,071

2010 SOC
N = 5,899

2013 SOC
n = 5,524

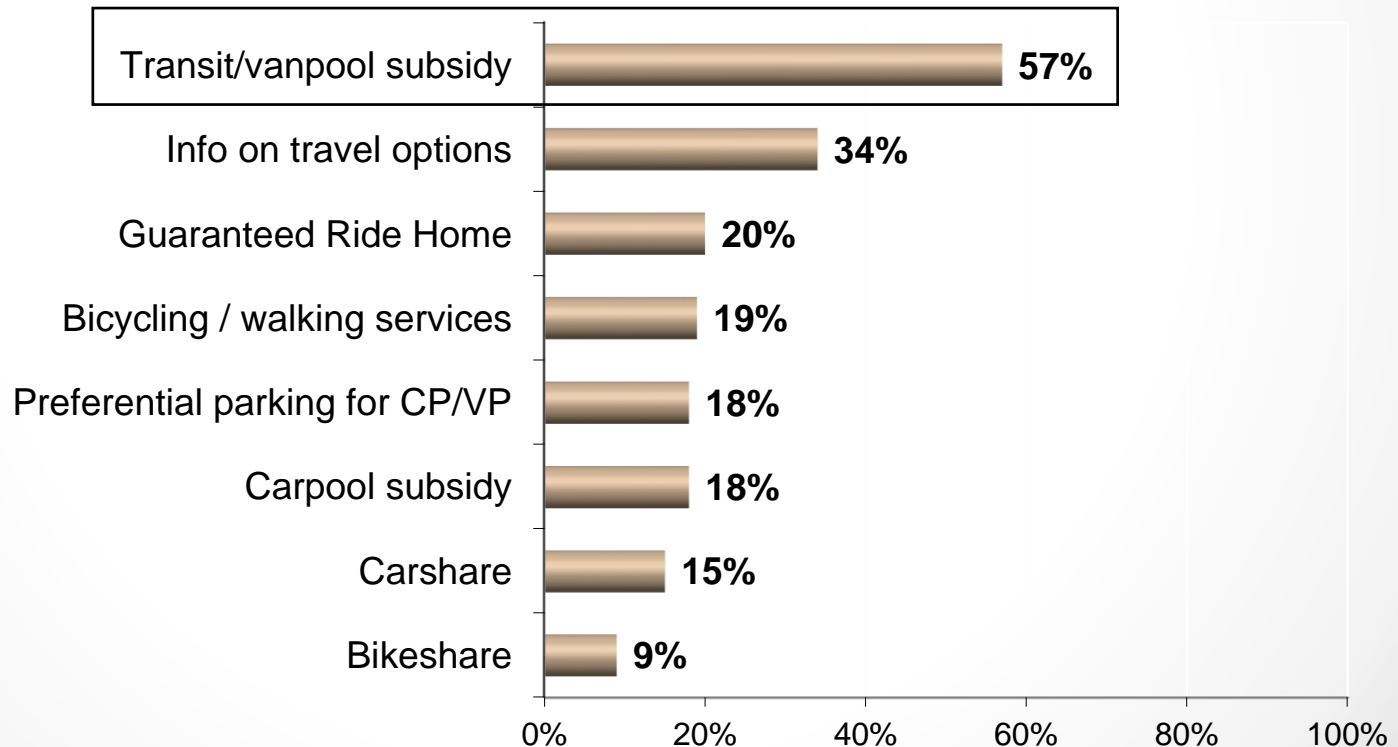
2016 SOC
n = 5,086



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 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

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

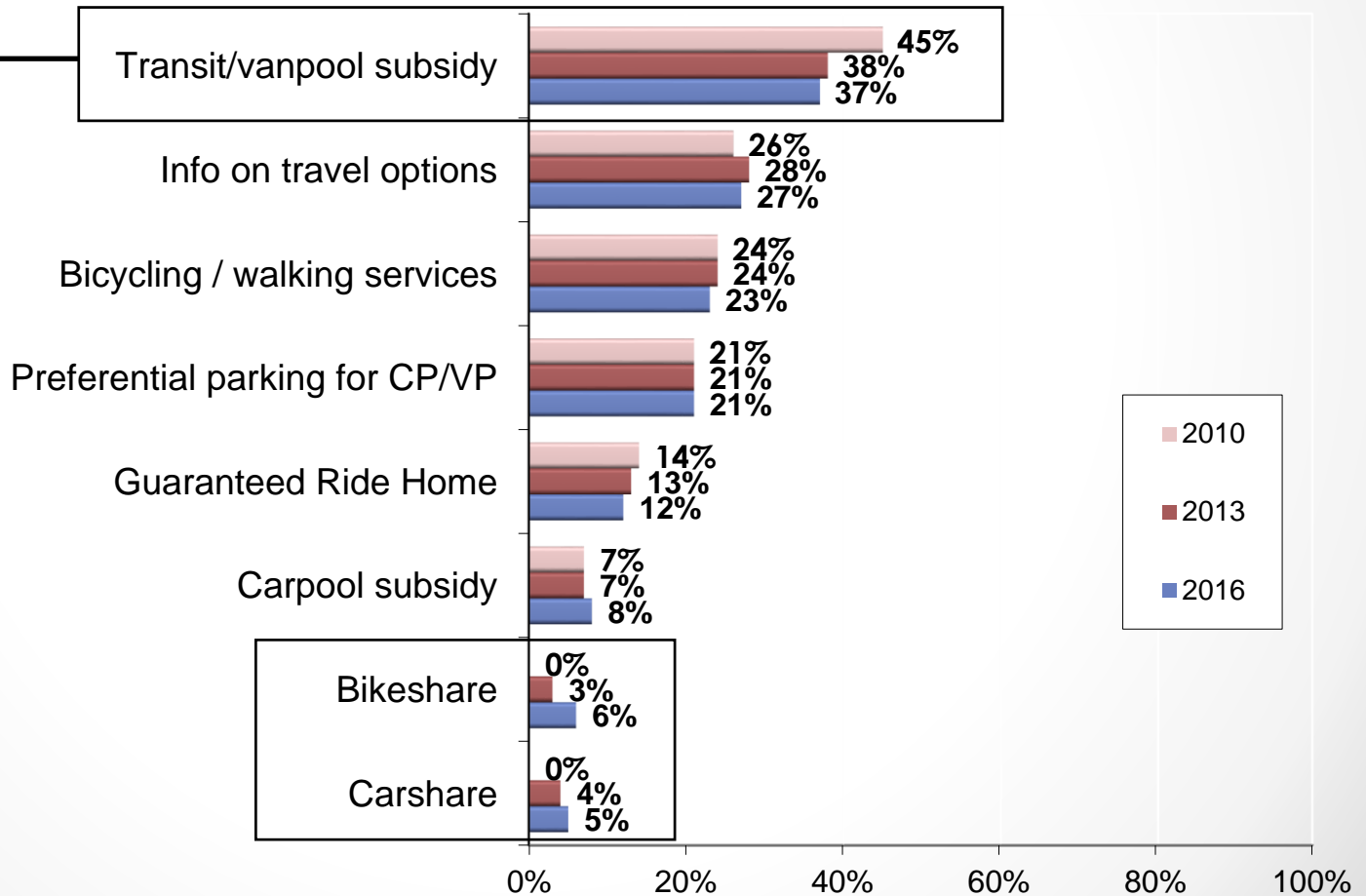
Transit/Vanpool Subsidies

- 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

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%

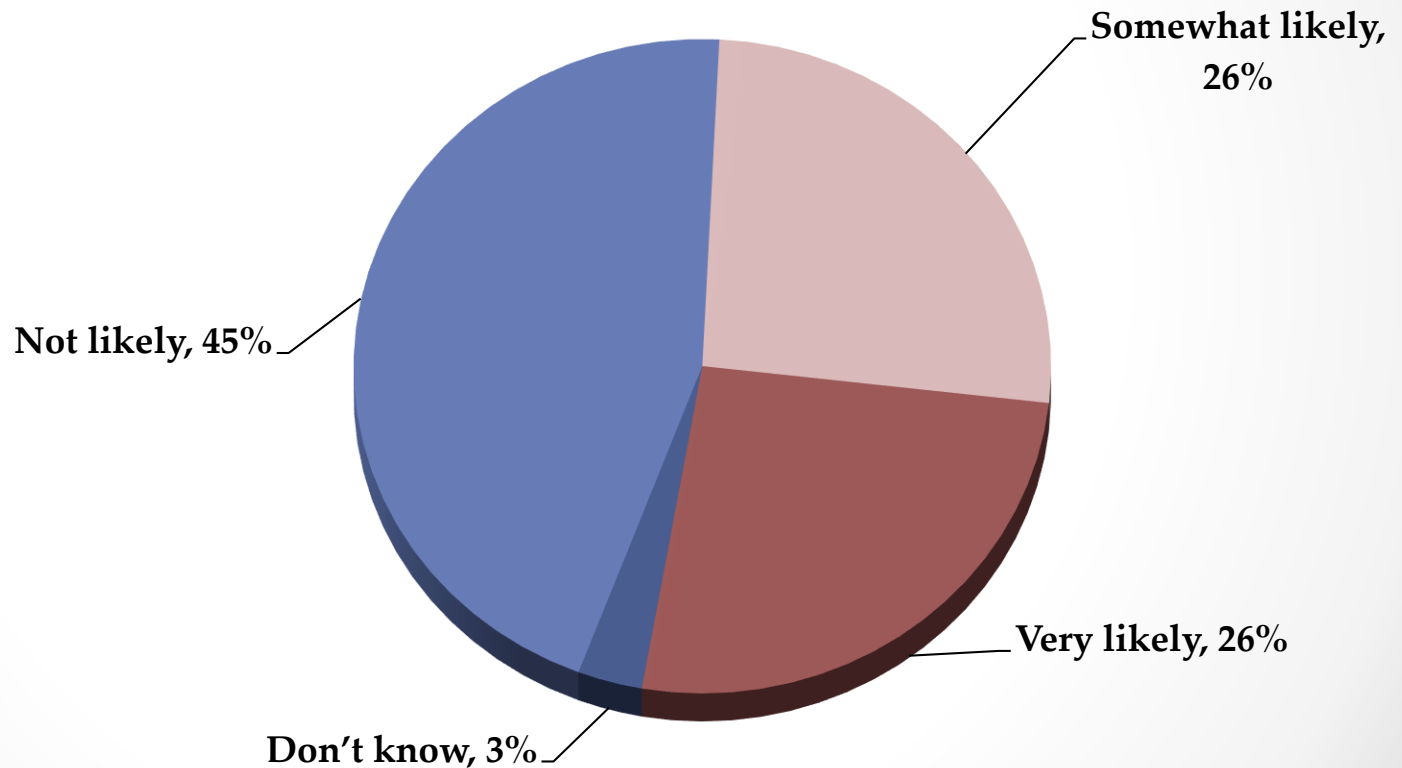
55+ years - 36%

Under 10 mi – 50%

10-19.9 mi – 51%

20+ mi – 56%

**2016 SOC
n = 2,004**



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?

Next Steps

• • •

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

Questions?



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