COMMUTER CONNECTIONS TDM EVALUATION PROJECT

2022 State of the Commute Survey Highlights

Nicholas Ramfos
Transportation Operations Programs Director

Joint TMD Advisory Committee Meeting
September 28, 2022

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Presentation Outline

A. Commuter Patterns
B. Telecommuting / Teleworking
C. Commuter Ease and Satisfaction
D. Technological Initiatives and Driverless Cars
E. Employer Services & Marketing Awareness

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

Differences between RTS and SOC Surveys

	Regional Travel Survey (2017-2018)	State of the Commute Survey (2022)
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
Recruitment	Mail using address based sampling	
Methodology	Internet/Phone Option	Internet Only in 2022
Geographic Coverage	TPB Modeled Area	Non-Attainment Region
Primary Data of Interest	Detailed all purpose trips and typical weekday travel	Commute patterns and commuter opinions
Primary Purpose	Analyze household and person trips to develop COG/TPB's regional travel demand forecasting model	Analyze commute trends / attitudes to evaluate the effectiveness of commuter services programs

COMMUTER CONNECTIONS.
A SMARTER WAY TO WORK

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

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

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

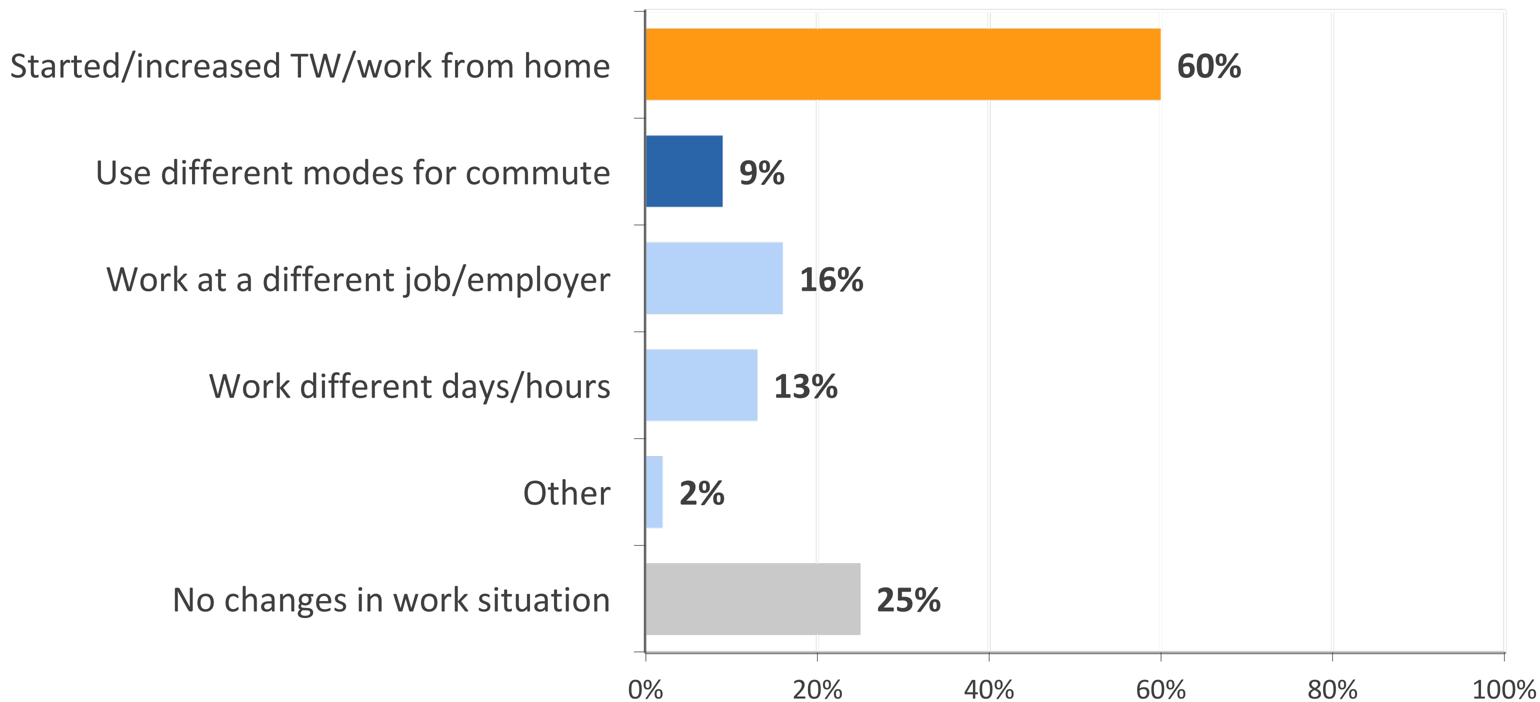
COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK

A. Commute Patterns

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

Pandemic Worker Commute Changes

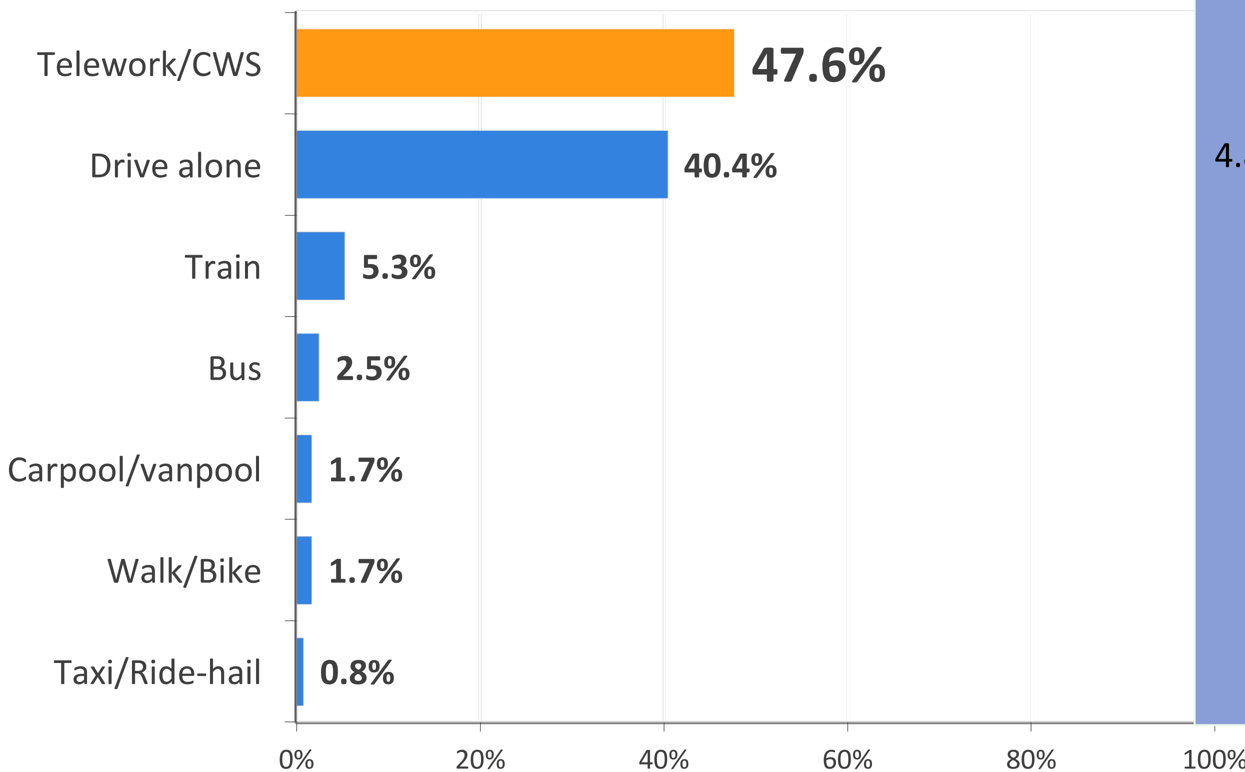
- 60% started or increased telework (*32% shifted to full-time telework*).
- Almost one in ten changed the travel mode on days they commute.
- Almost three in ten made change in their work arrangement



COMMUTER CONNECTIONS. A SMARTER WAY TO WORK

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



Alternative Mode:

Transit

4.8% Metrorail; 0.5% Commuter Rail

Carpool/Vanpool

1.6% Formal; 0.1% Slug; <0.1% Vanpool

Walk/Bike

1% Walk; 0.7% Bike

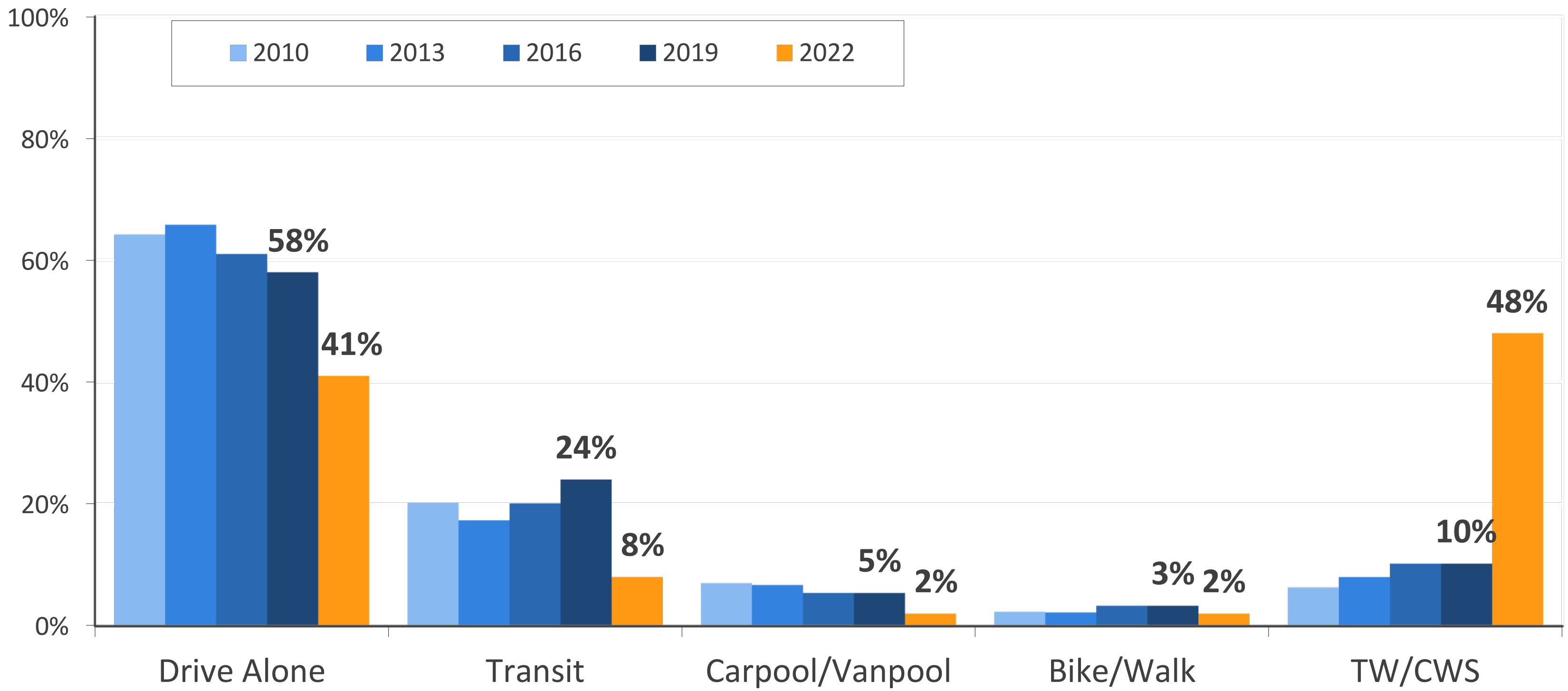
Ride Hail/Taxi

0.7% Ride-hail; 0.1% Taxi

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Weekly Commute Trips by Mode Trend

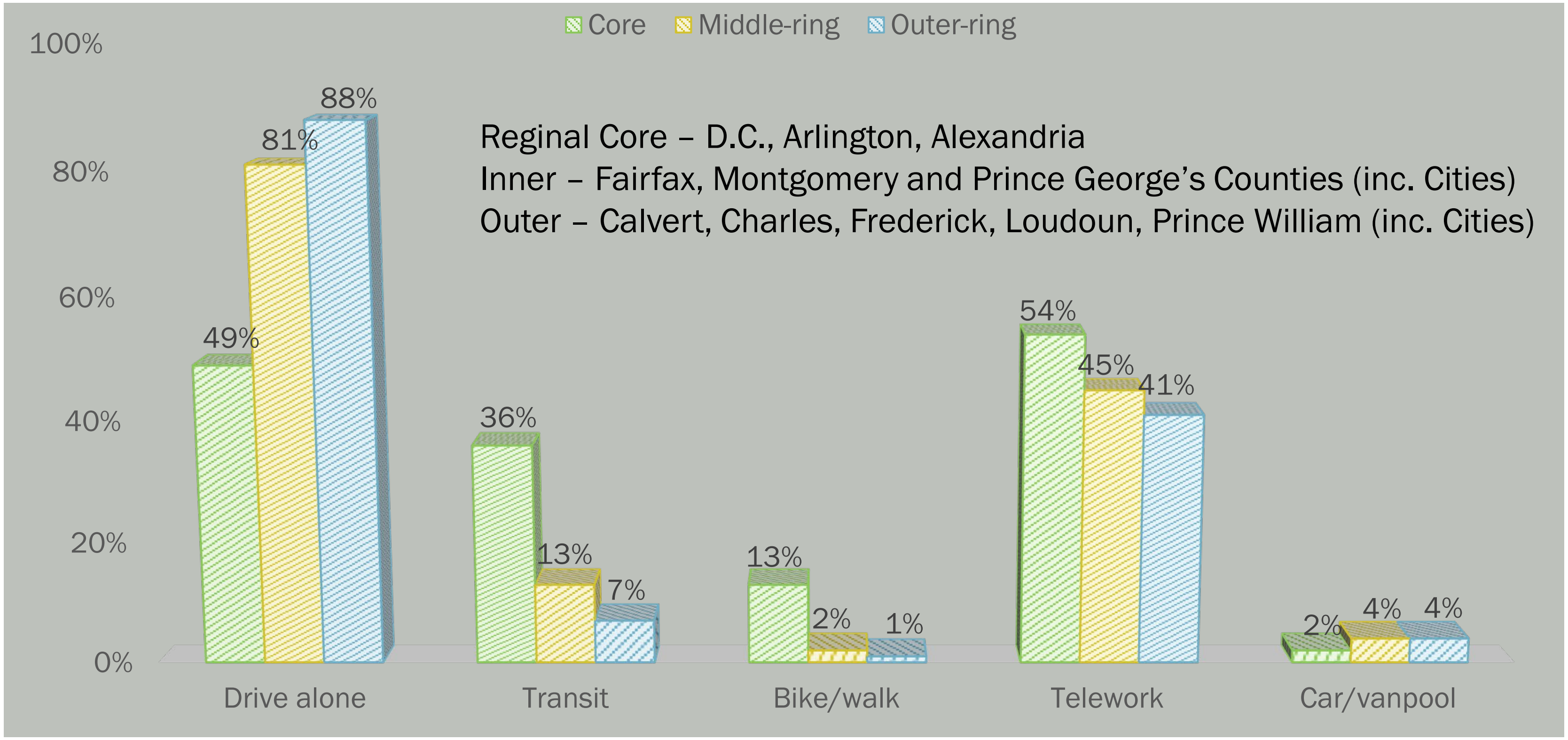
- Pandemic has caused a major shift in travel mode trend
  - Five fold increase in Telework
  - Three fold decrease in Transit
  - Largest drop in drive alone trips since 2010



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

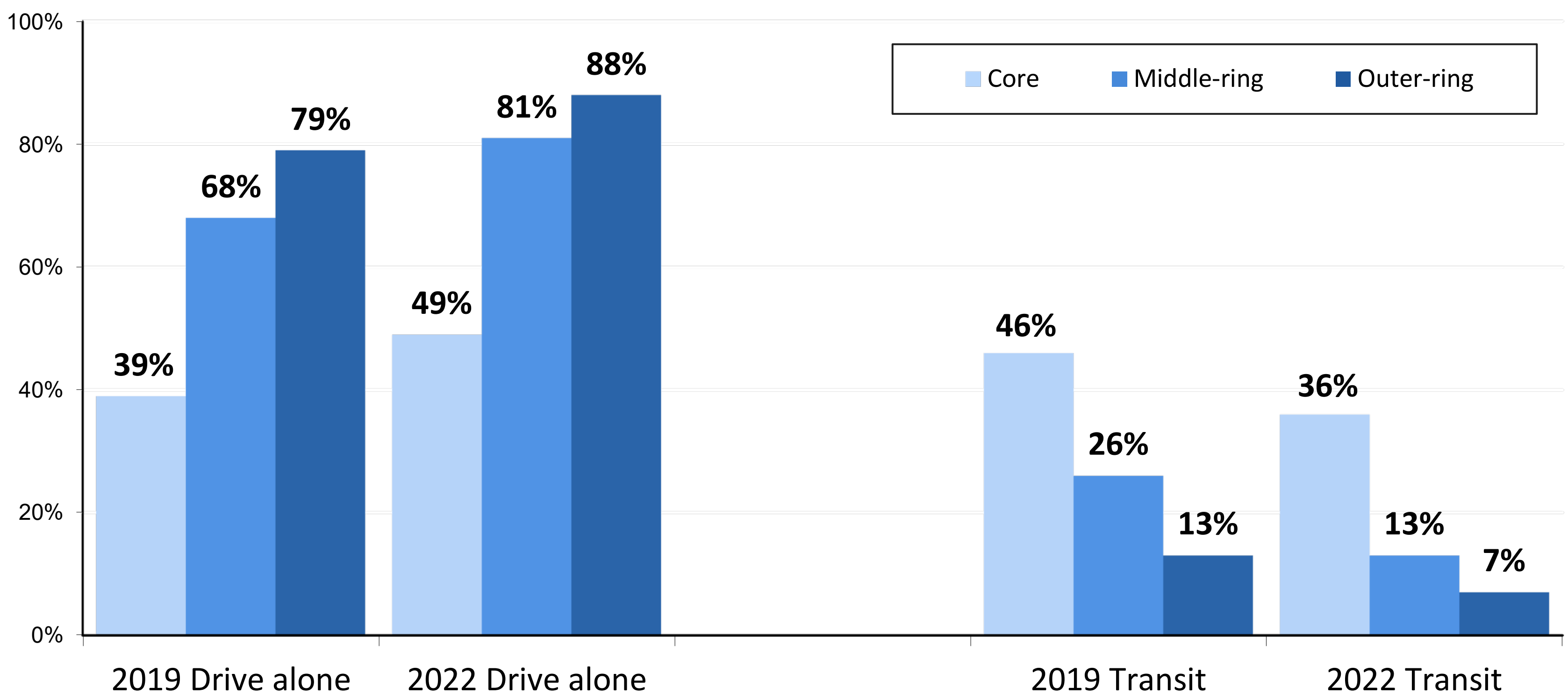
Variations in Commute Mode by Home Area

- 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

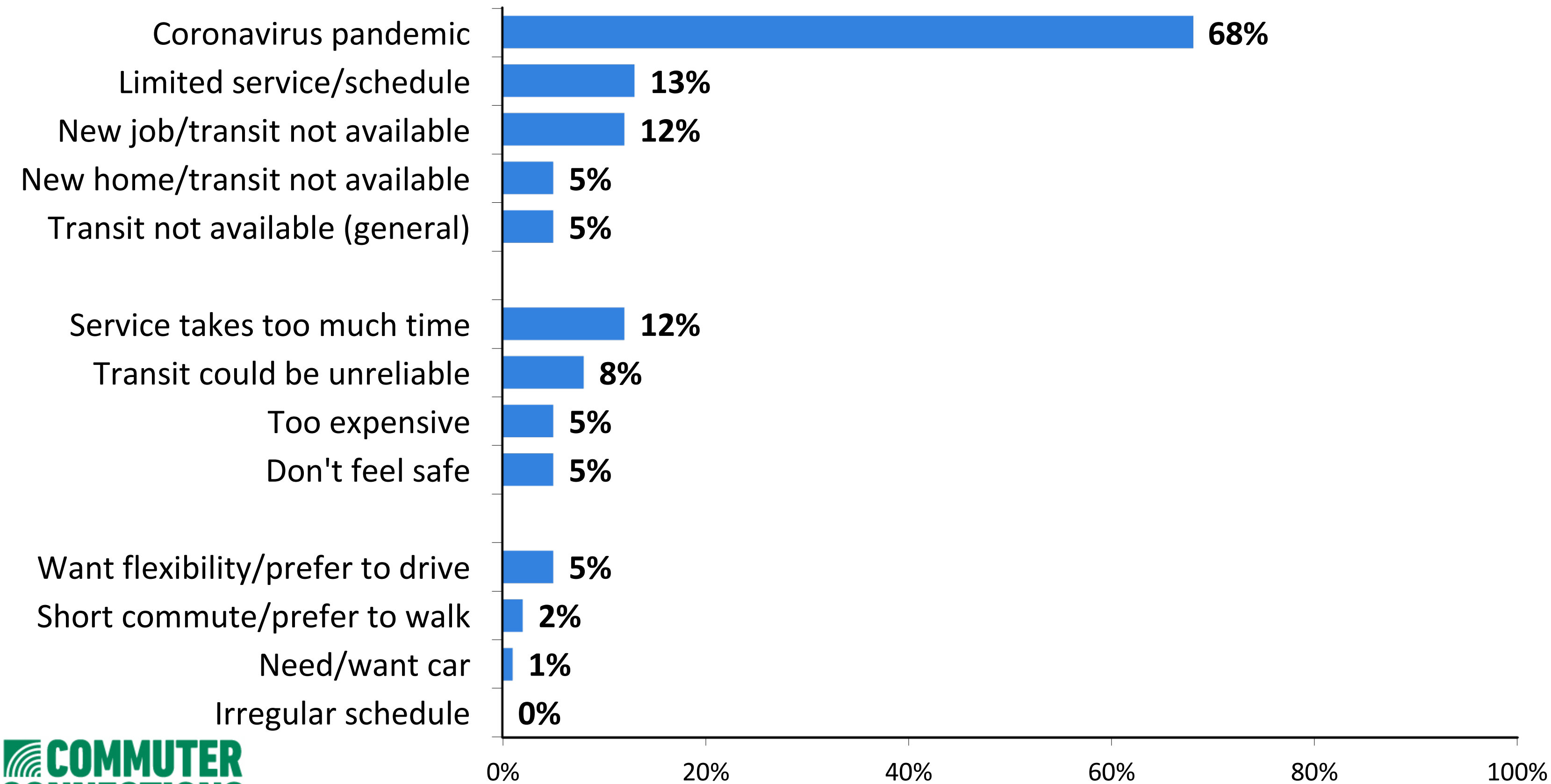
- Pre-pandemic pattern still holds: Core Higher transit / Inner & Outer Higher drive alone
- Transit mode share loss in all 3 sub-areas; most (50%) in Inner and Outer
- Drive alone increased in all 3 sub areas; most in Inner jurisdictions



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Reasons For Discontinuing Transit Use

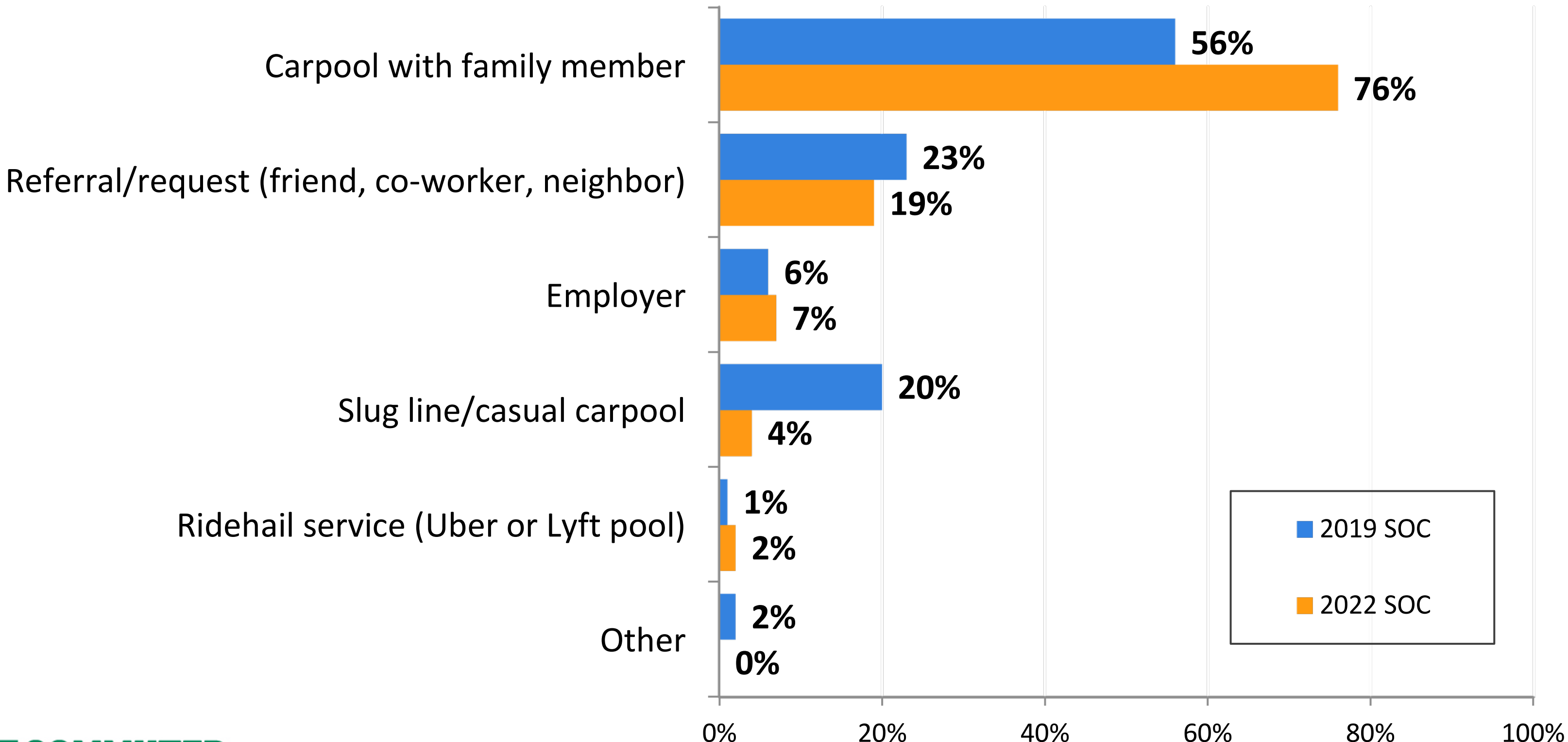
- Pandemic related concerns by far main reason (68%)
- Limited Service/Schedule Issues (some pandemic related) was the next highest (13%)
- Unavailability of transit at new job (12%)
- Service taking too much time (some non-pandemic 12%)



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Carpool Formation

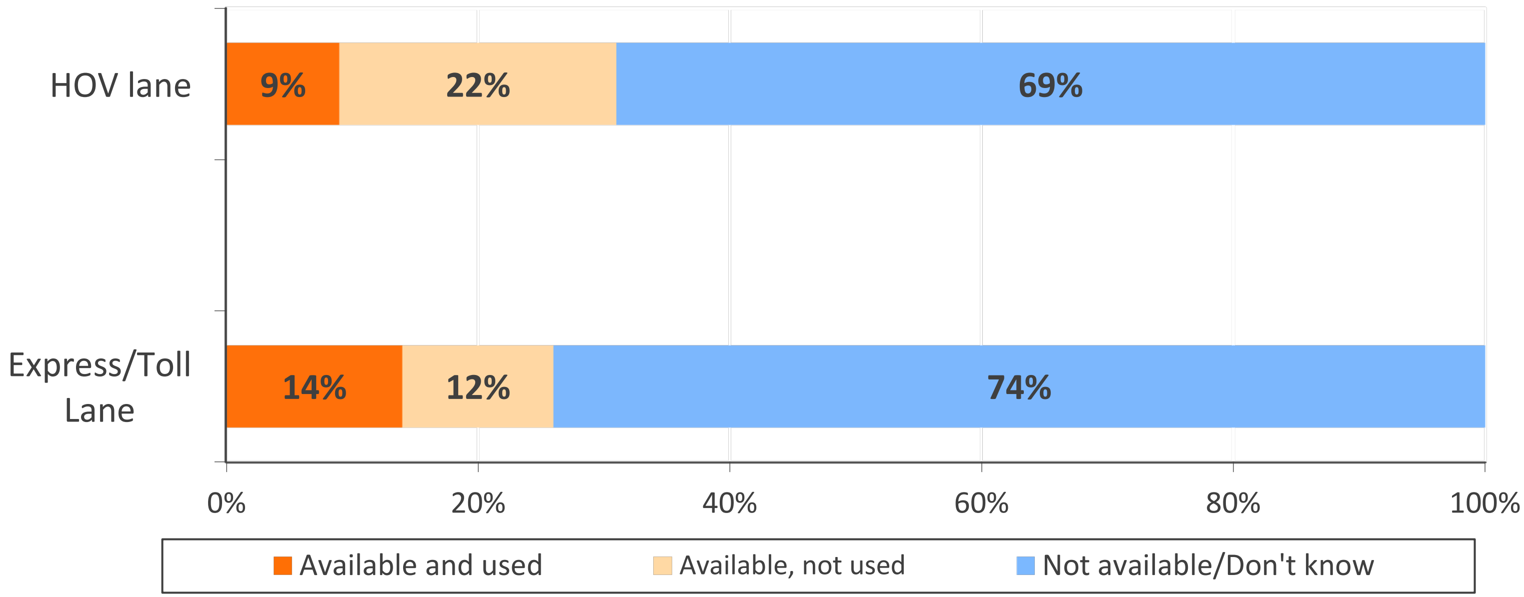
- Pandemic caused major change - 76% of Carpool with Family Members (Pre-pandemic, 2019, 56% were Household Carpools)
- Casual carpooling (Slugging) dropped significantly – 4% of all carpools (Pre-pandemic, 2019, 20% of all carpools)



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

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

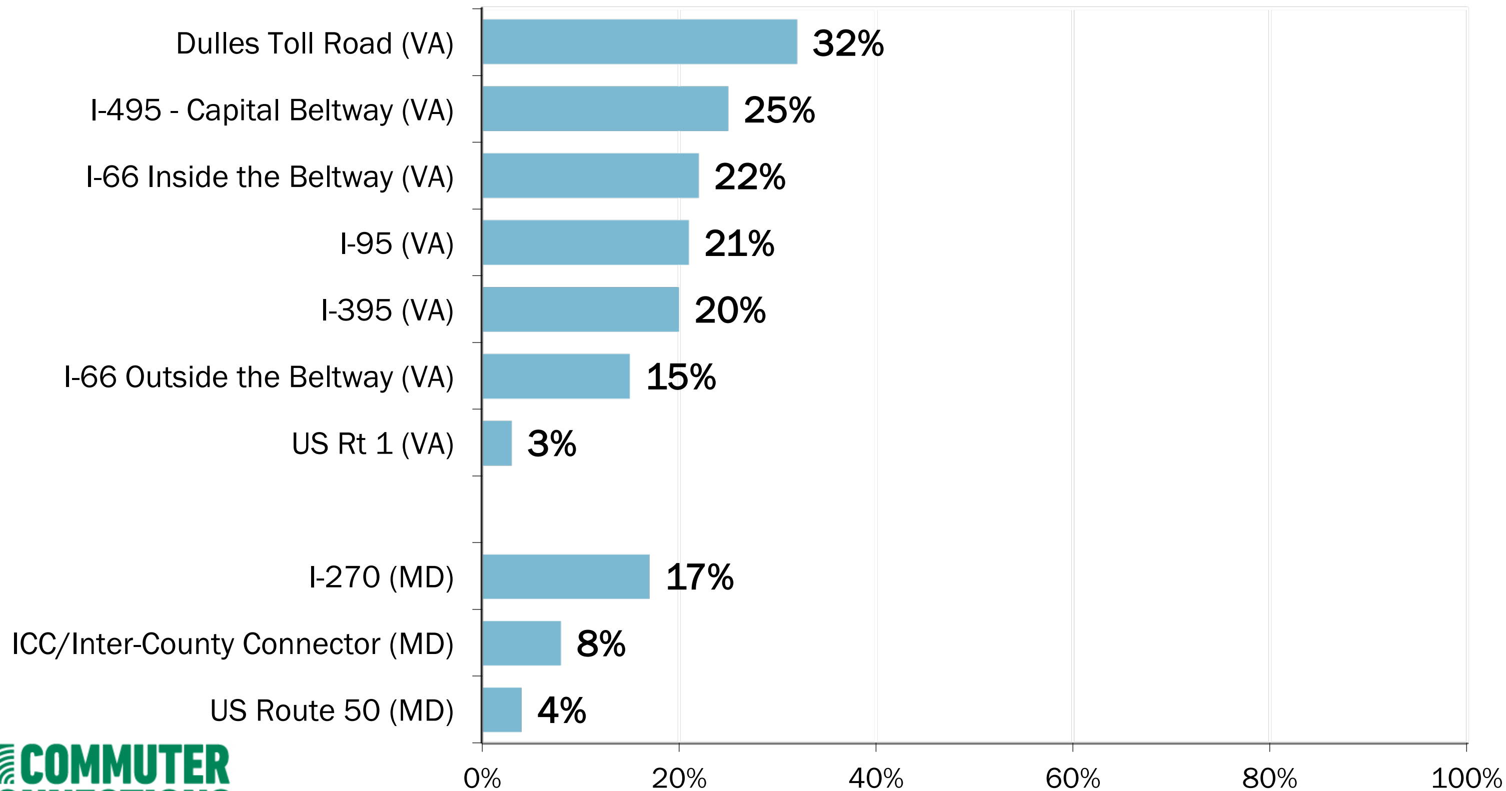


- CP/VP Use is 9% With Access to HOV Lane vs 3% with No HOV or Express Lane Access

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

HOV and Express/Toll Lanes Use

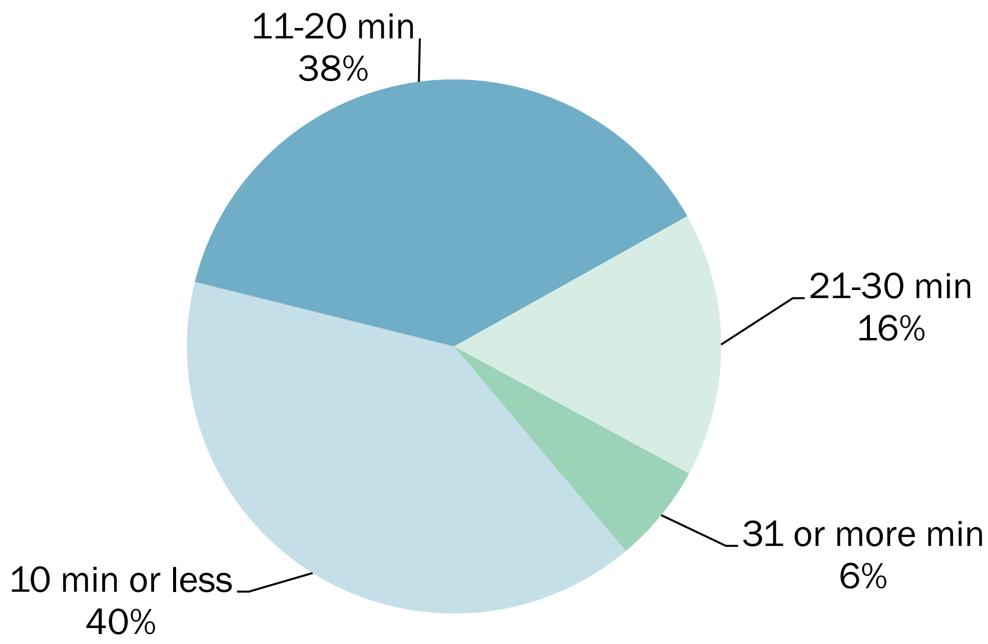
- HOV and HOT lanes in Virginia used by more commuters than those in Maryland
- Dulles Corridor has the highest HOV lane usage
- Usage of Virginia's Capital Beltway HOT Lanes has a higher share than those along I 95/I 395



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

HOV and Express Lanes Time Savings

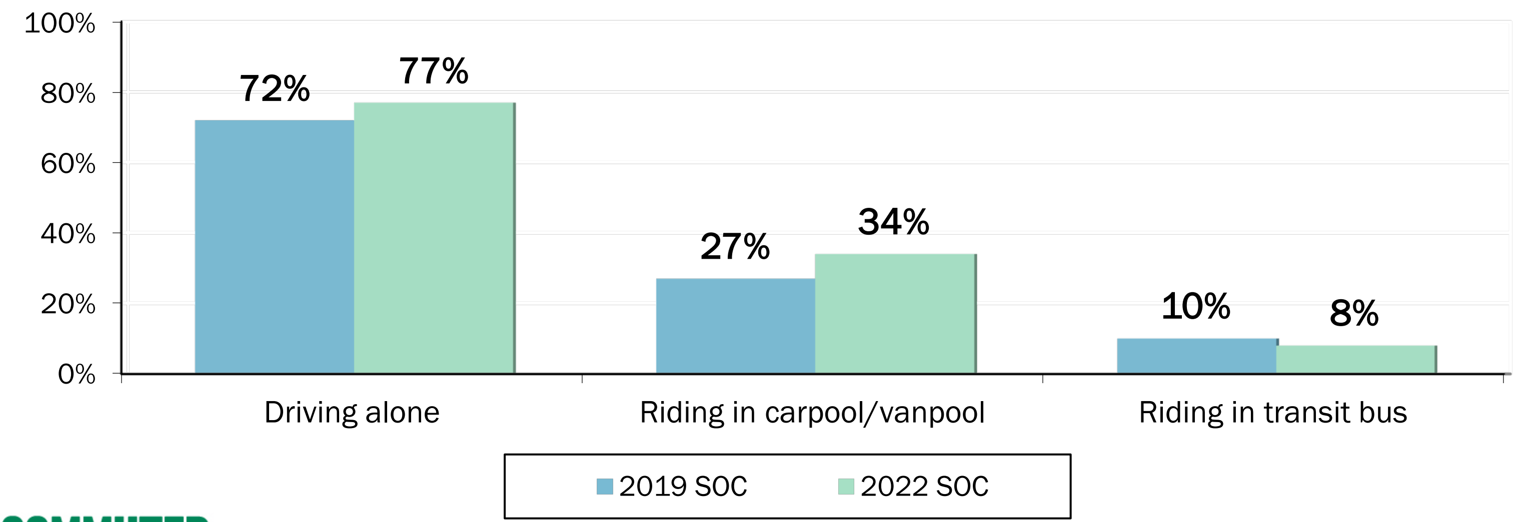
- About 60% of HOV/HOT lane users cite time savings of 11 to more than 30 minutes
- A bit more than 1 in 5 cite time savings of more than 20 minutes



COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK

HOV and Express Lanes Usage

- More than three-quarters of Express/Toll Lane users drove alone while riding in the Express/Toll Lanes.
- About one-third (34%) rode in a carpool or vanpool (at least some days).



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

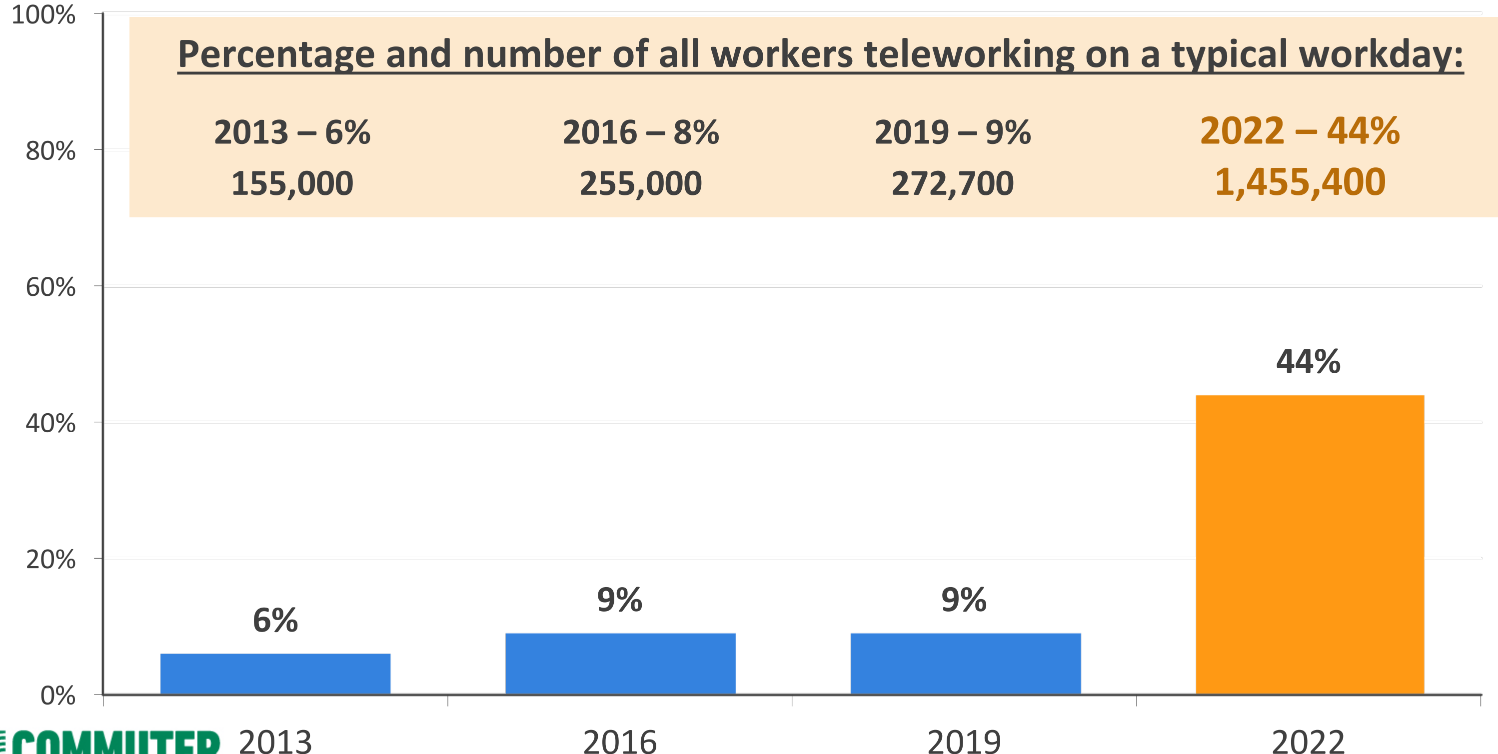
B. Telecommuting / Teleworking

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

COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK

Number of Telecommuters / Teleworkers

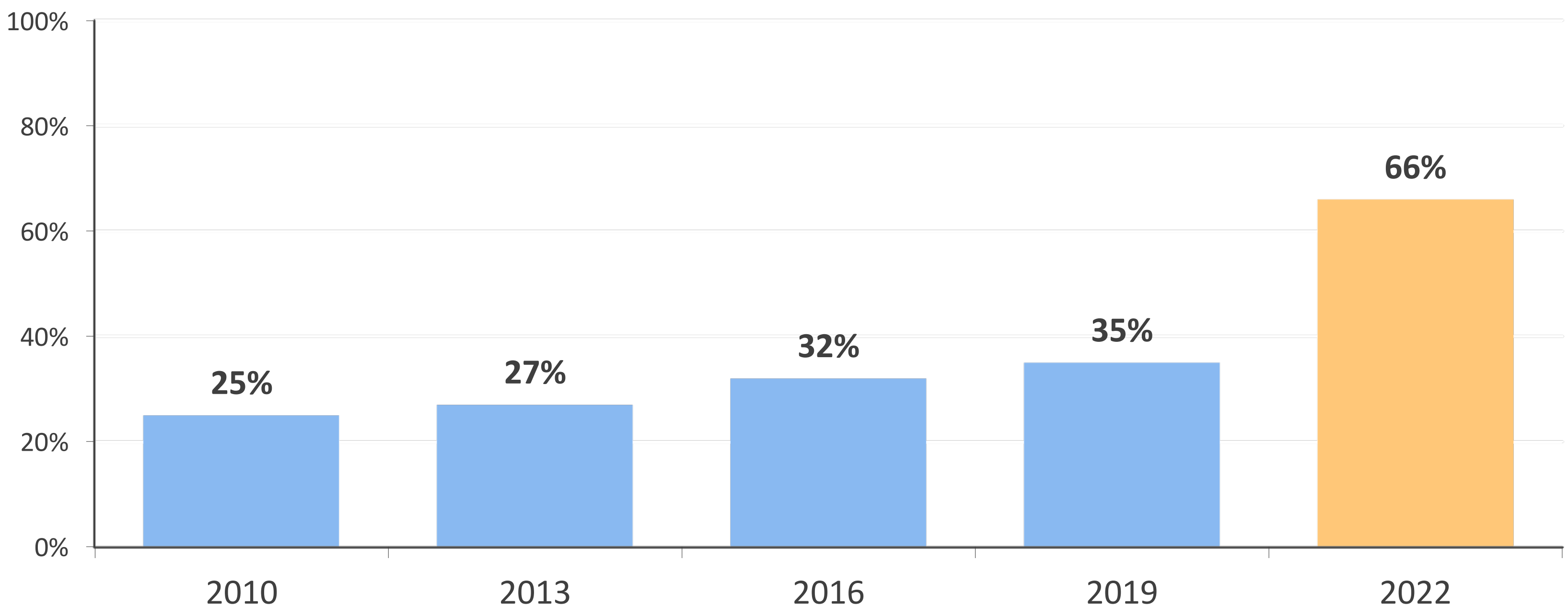
- Telework Has Had a Dramatic Impact on Workday Commuting in 2022
  - More than fourfold increase since 2019
  - Nearly 1.5 Million Regional Workers Telework on a Typical Workday



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Number of Telecommuters / Teleworkers

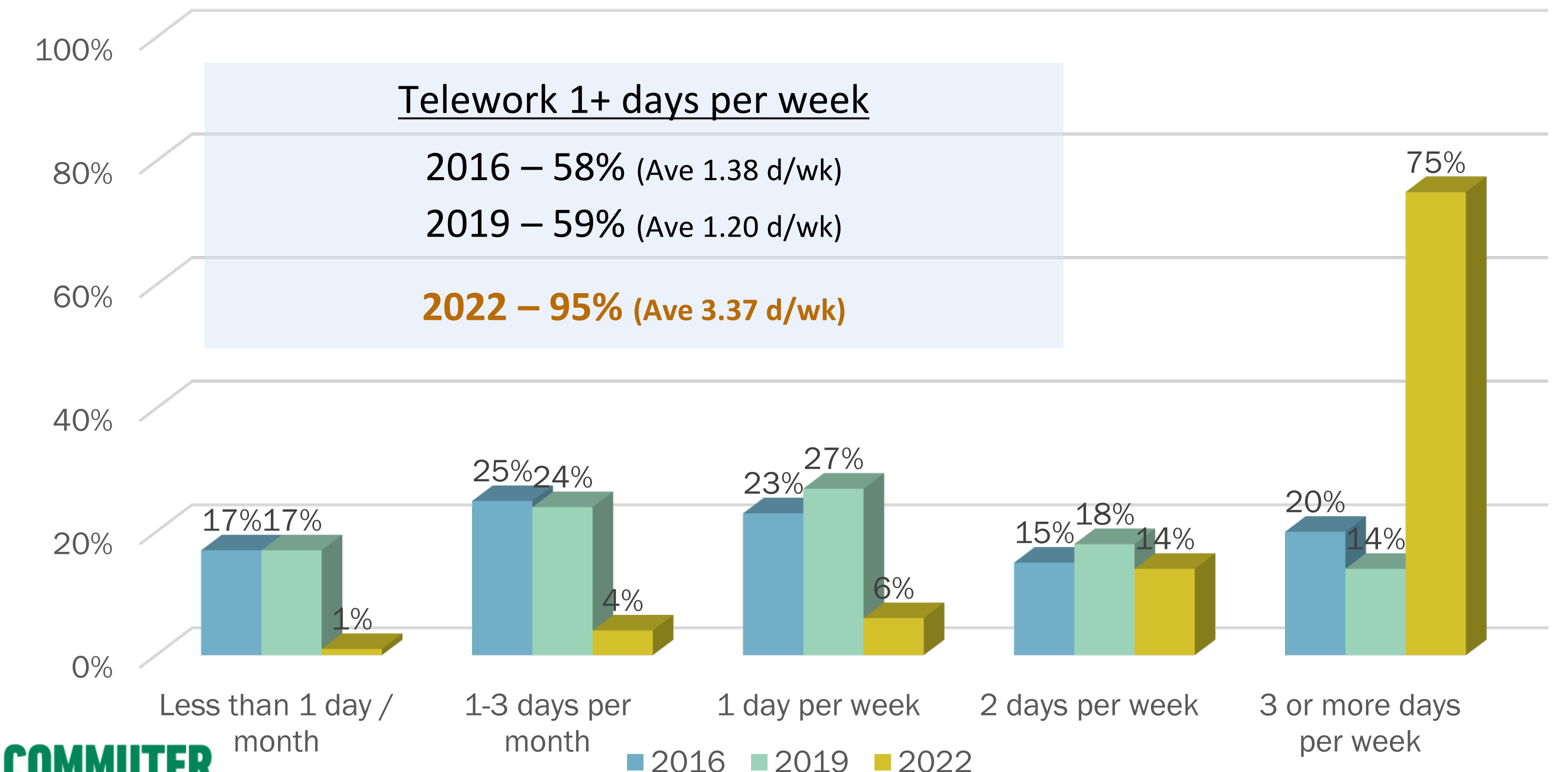
- Proportion of commuters who teleworked occasionally or regularly doubled from 2019 levels
  - About 2.3 million of region's workers telework occasionally or regularly



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Telework Frequency

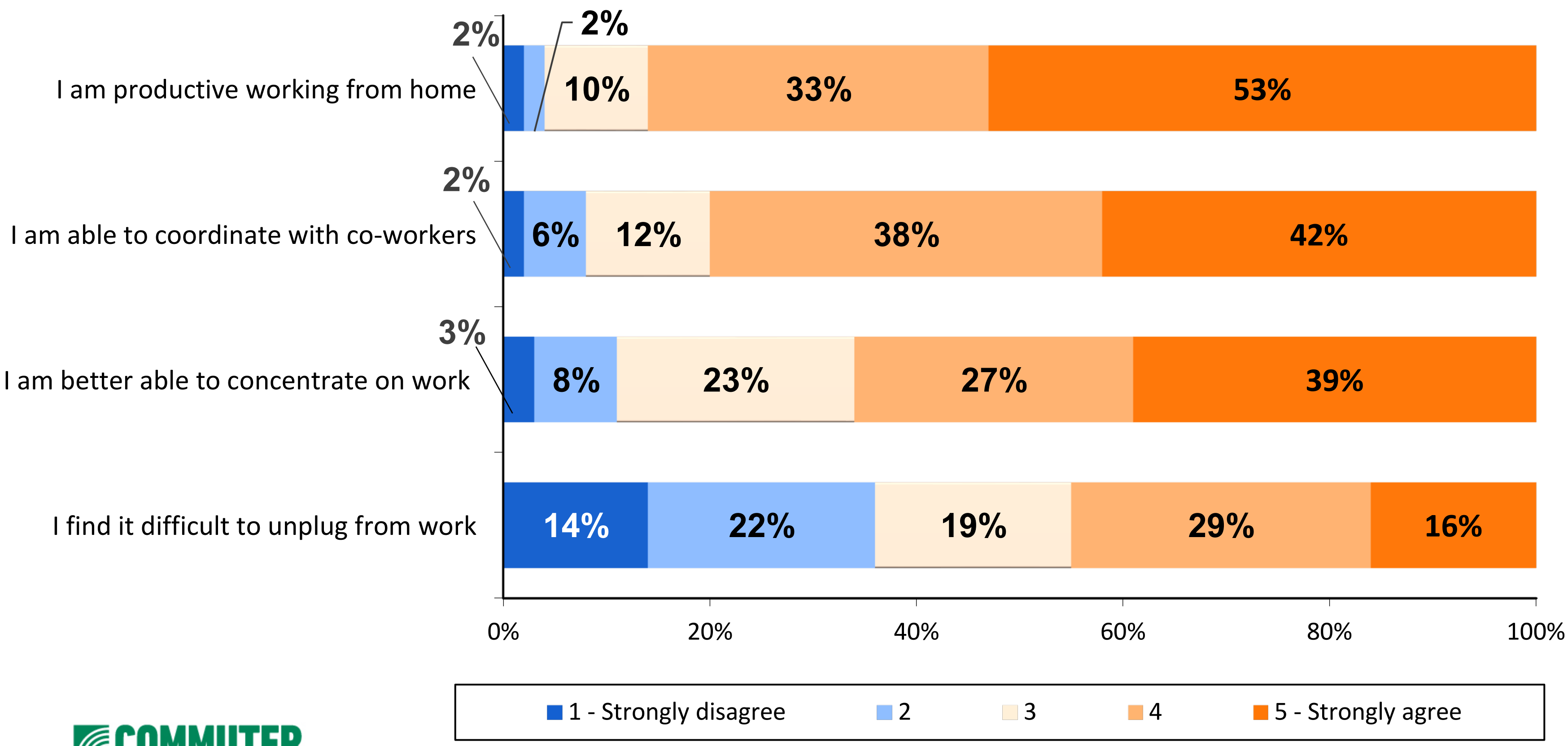
- Average Frequency of Weekly Telework almost tripled since 2019
  - From 1.2 days/week to 3.4 days/week
- Three quarters of commuters now telework 3 or more days / week
- Only 6% of commuters telework 1 day a week



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Teleworking Experience

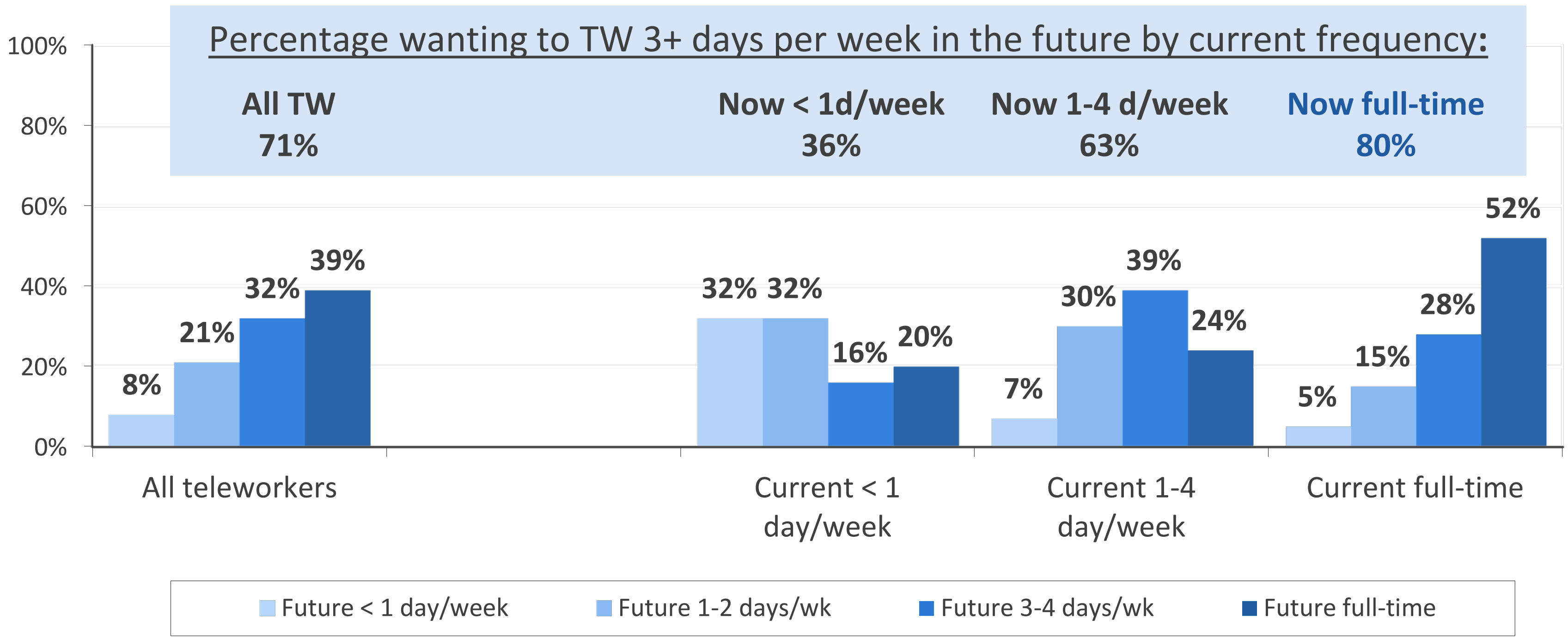
- At least 80% of Teleworkers reported being more productive and able to coordinate with co-workers
- 45% of Teleworkers reported difficulty “unplugging” from work



COMMUTER CONNECTIONS
A SMARTER WAY TO 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



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

C. COMMUTE EASE & SATISFACTION

- Commute Satisfaction
  (by geographic area and mode)
- Ease of Commute
- Modes Considered as Part of Moving

COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK

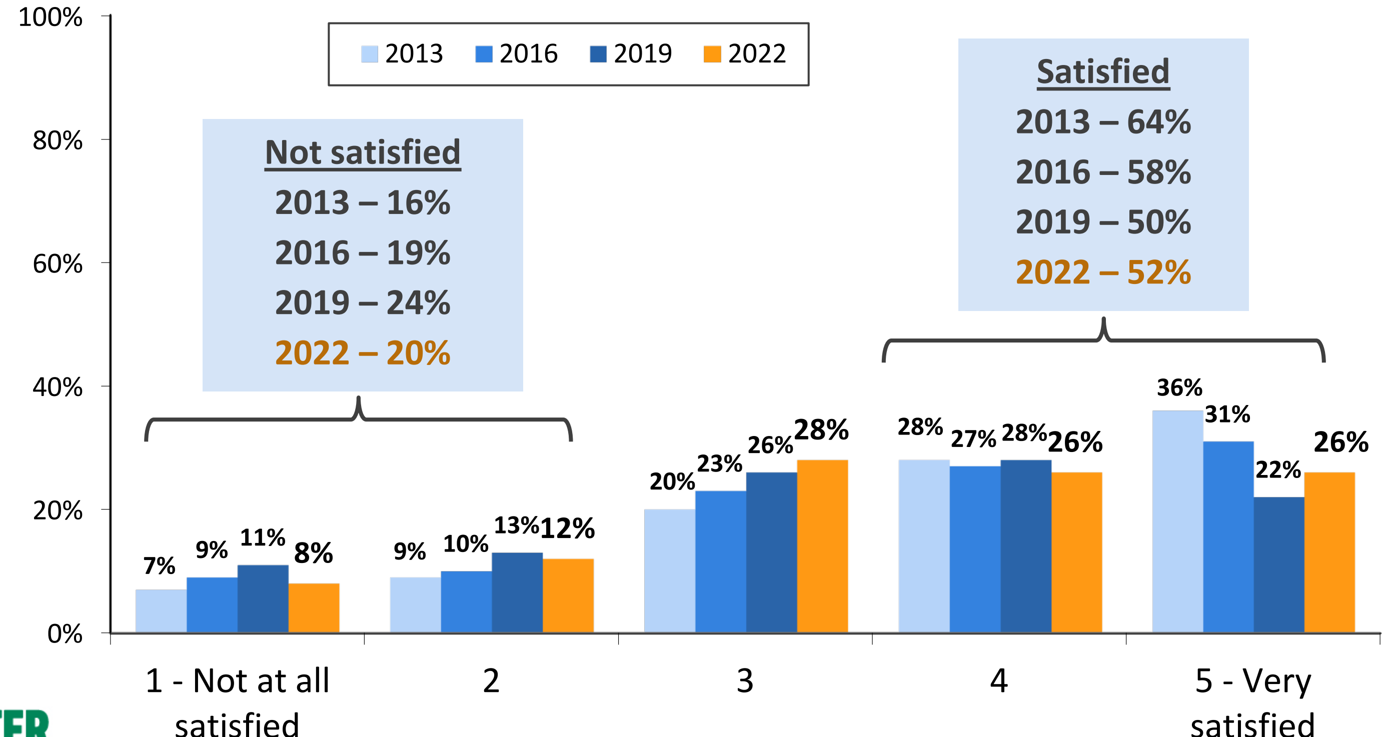
Satisfaction by Location & Time

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%

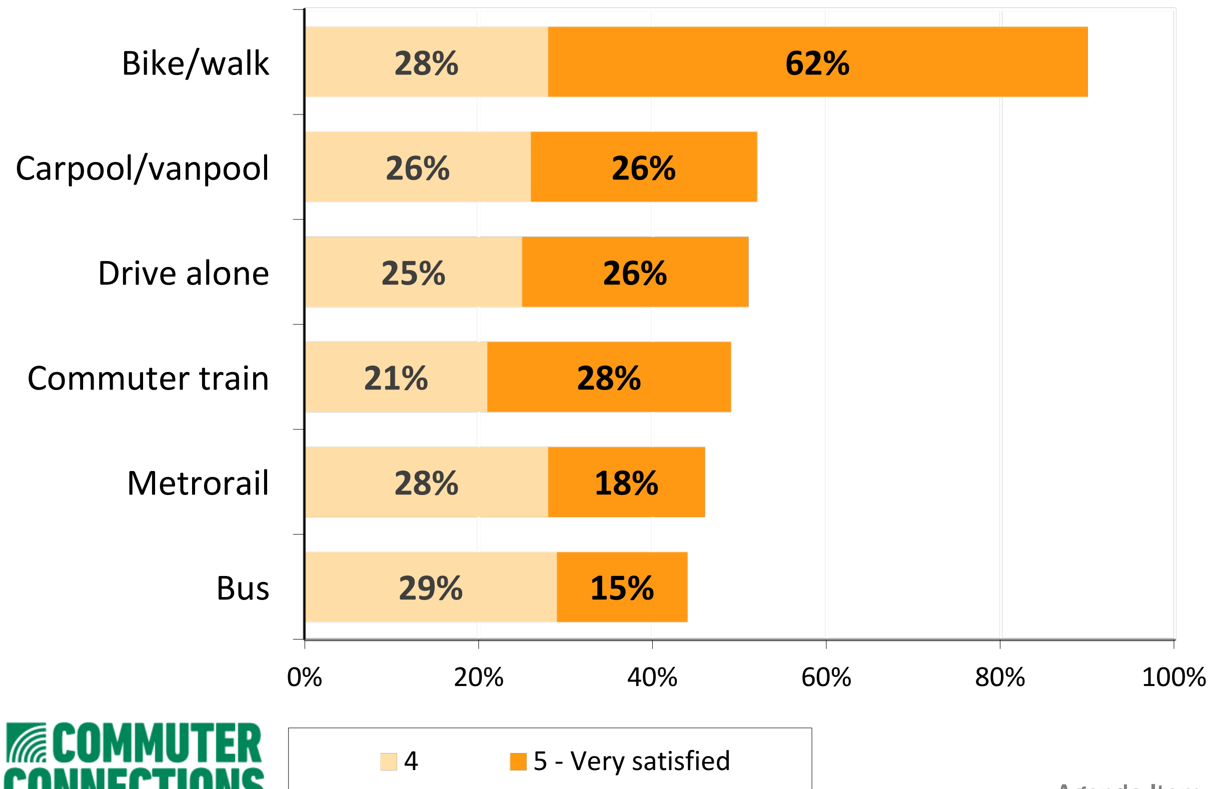


COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

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

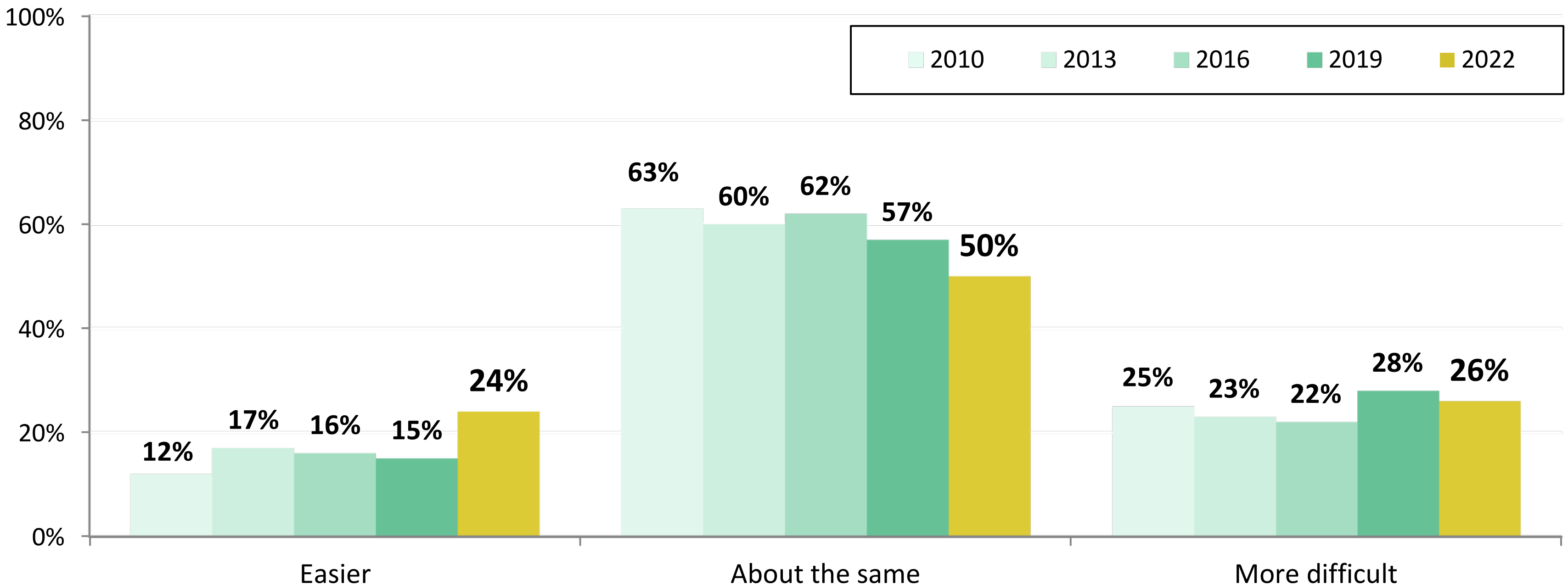


2016	2019	2022
97%	92%	90%
66%	48%	**52%**
57%	45%	**51%**
70%	56%	**49%**
48%	56%	**46%**
66%	62%	**44%**

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

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)



<u>More Difficult Commute</u>

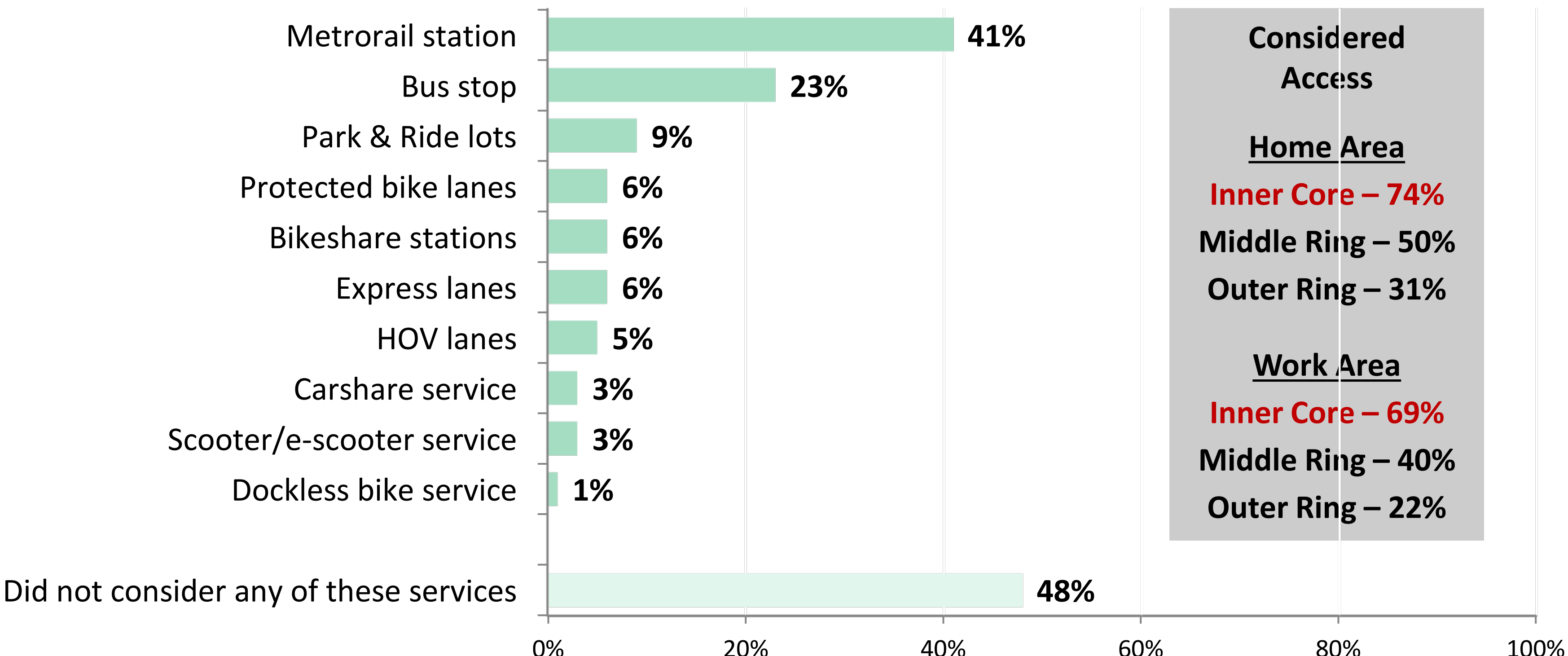
<u>Home Area</u>: Inner Core – 33%, Middle Ring – 24%, Outer Ring – 35%

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Mode Access Considered When Moving

52% 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



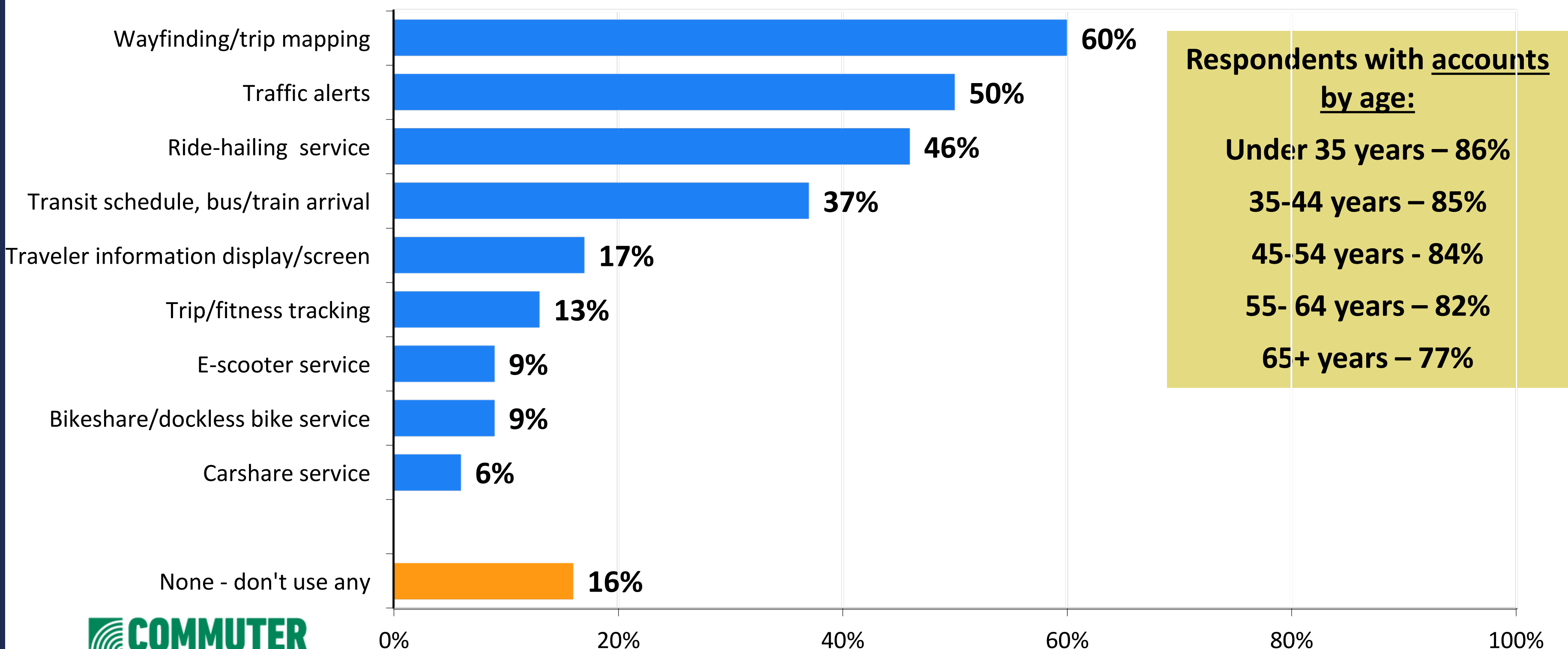
D. Technology Initiatives and Driverless Cars

- Travel Trip Applications
- Driverless Cars

COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK

Travel/Trip Information Application Use

- 84% of Respondents Had an Account With at Least One Travel/Trip Information Application
  - Wayfinding/Trip Mapping (60%), Traffic Alerts (50%)
  - Use of accounts declined slightly with increasing age



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Driverless Cars – Familiarity

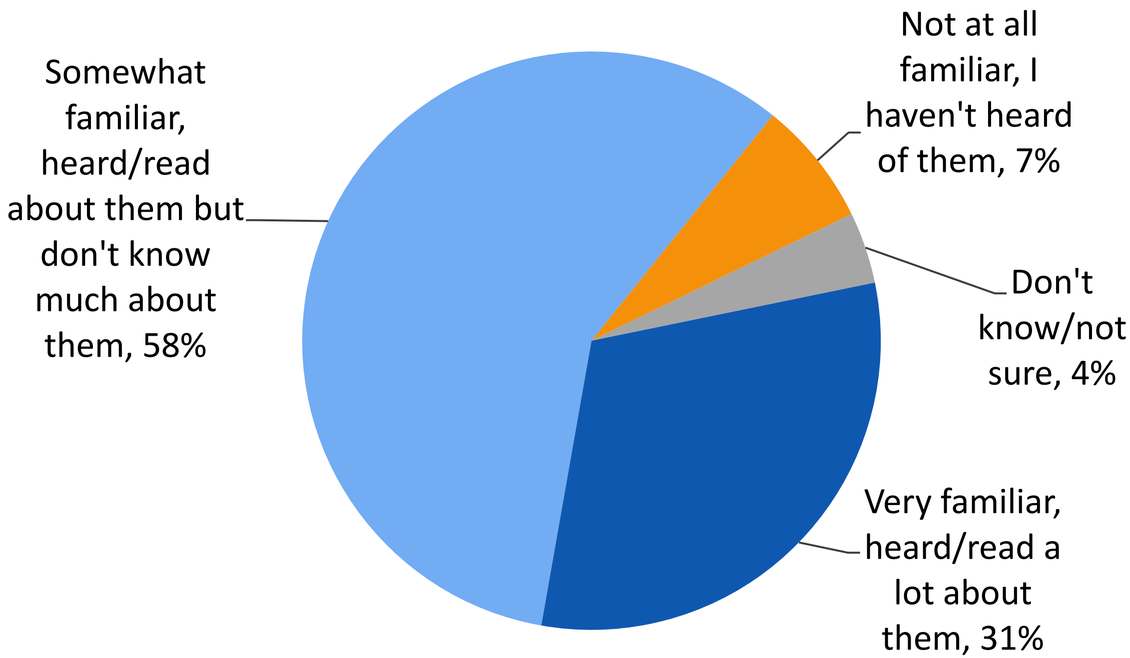
- About 90% commuters familiar with concept of driverless cars
  - One-third “Very Familiar”; 58% “Somewhat Familiar”
  - Significant gender disparity in familiarity / Not much disparity by age

Reported Being <u>very familiar</u>:

Male – 42%
Female – 19%

$160K+ – 37%
$100-$159K – 30%
< $100K – 27%

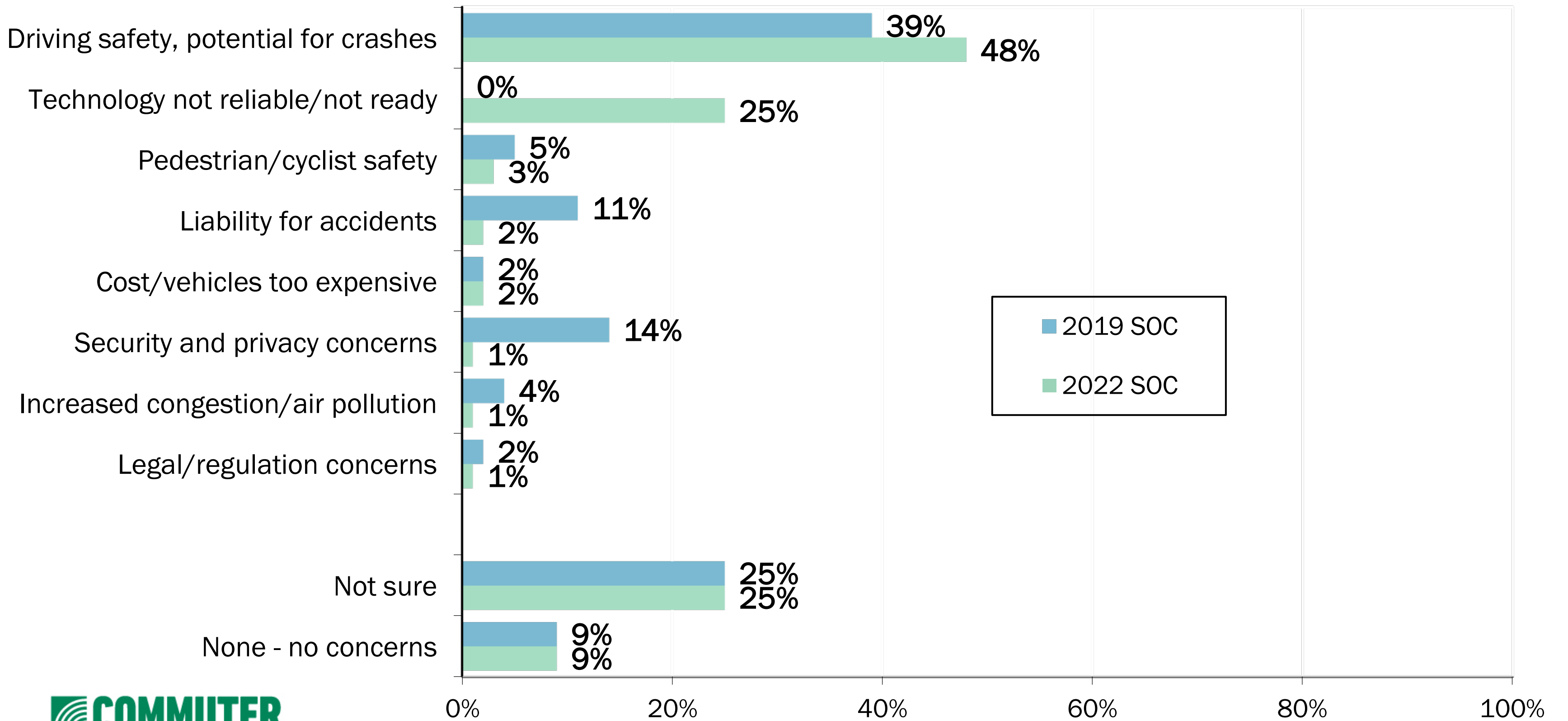
18-24 years – 94%
25-44 years – 90%
45 -54 years – 88%
55- 64 years – 89%
65+ years – 90%



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Concerns With Driverless Cars

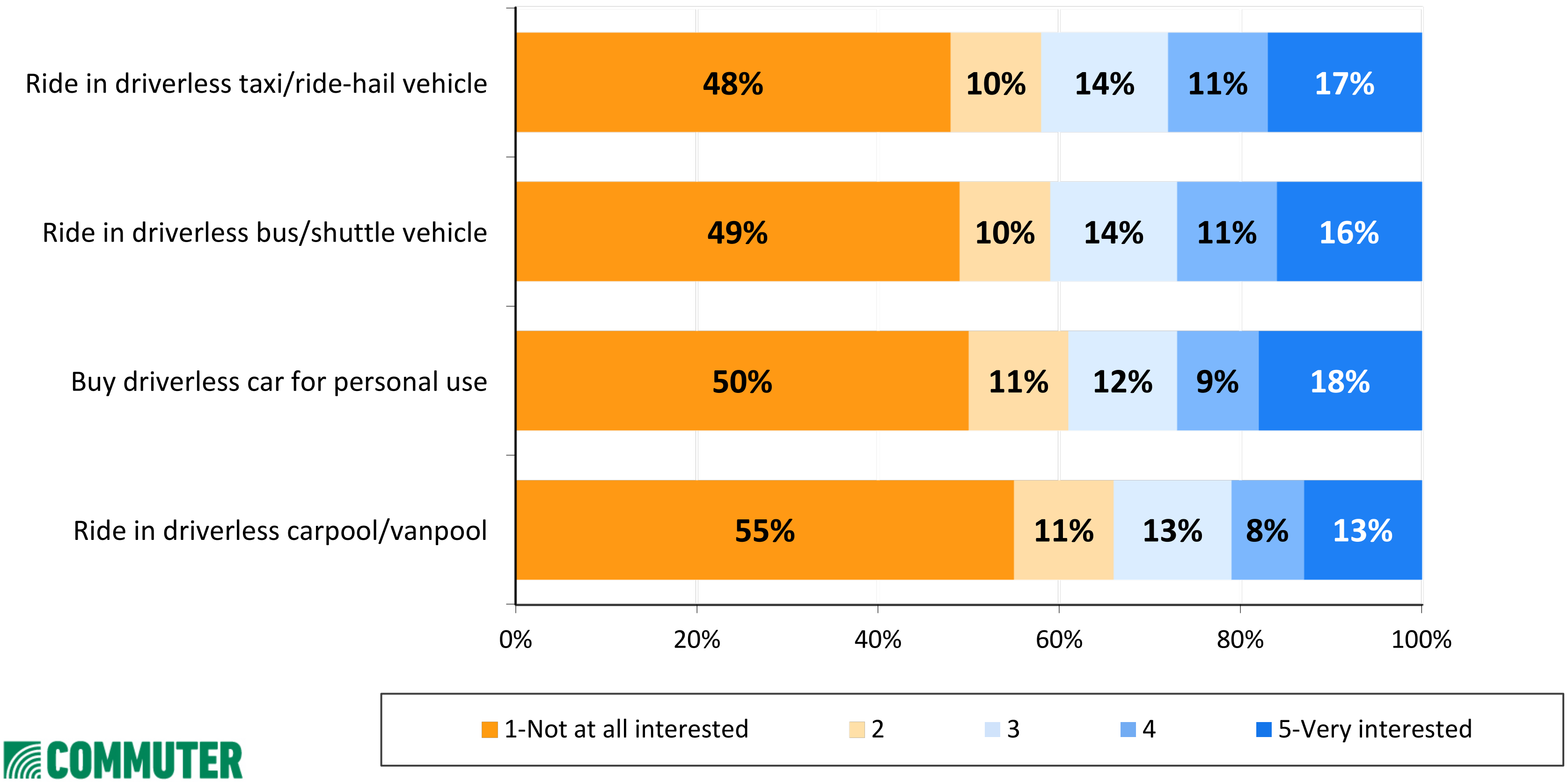
- More commuters now cite reduced safety / potential for crashes
- Far fewer now cite liability and privacy as a concern
- A quarter of the commuters have concerns about reliability



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

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.



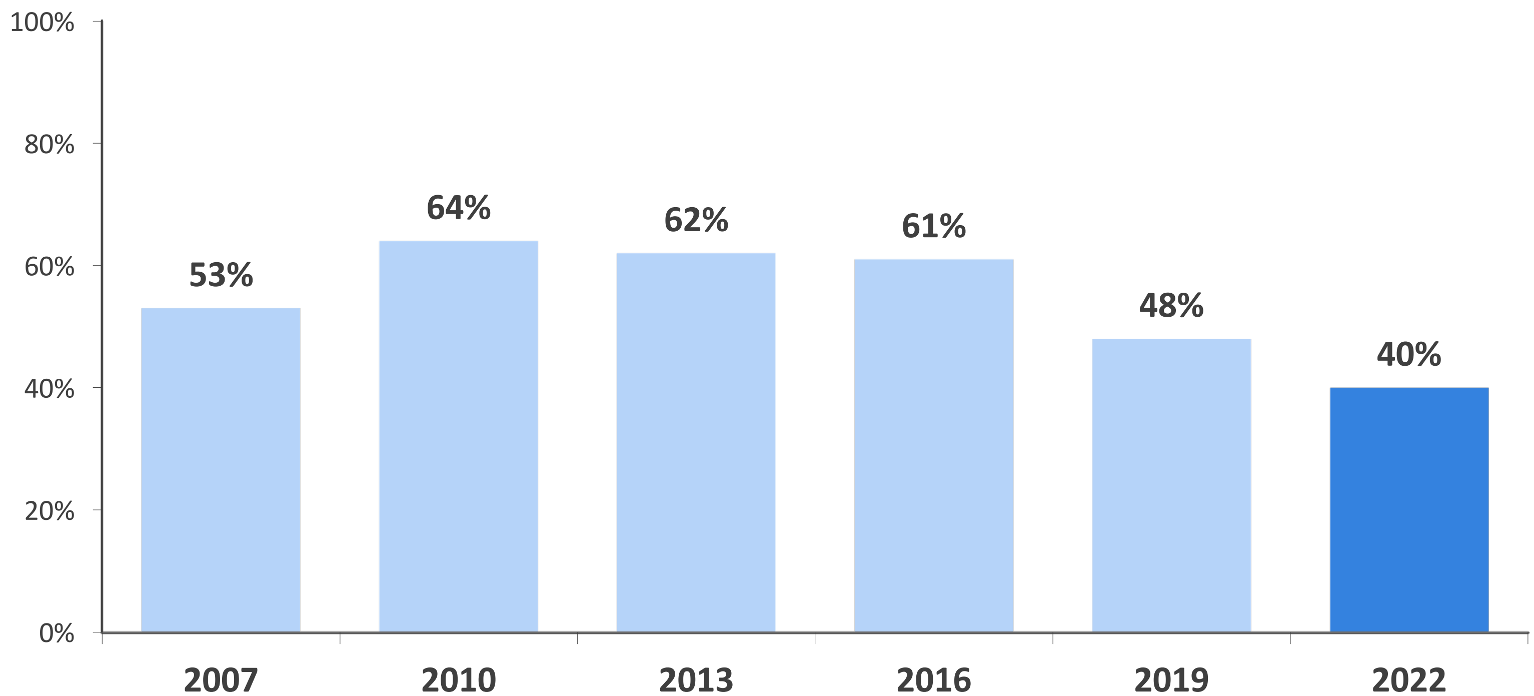
COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

E. Employer Services /Marketing Awareness

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

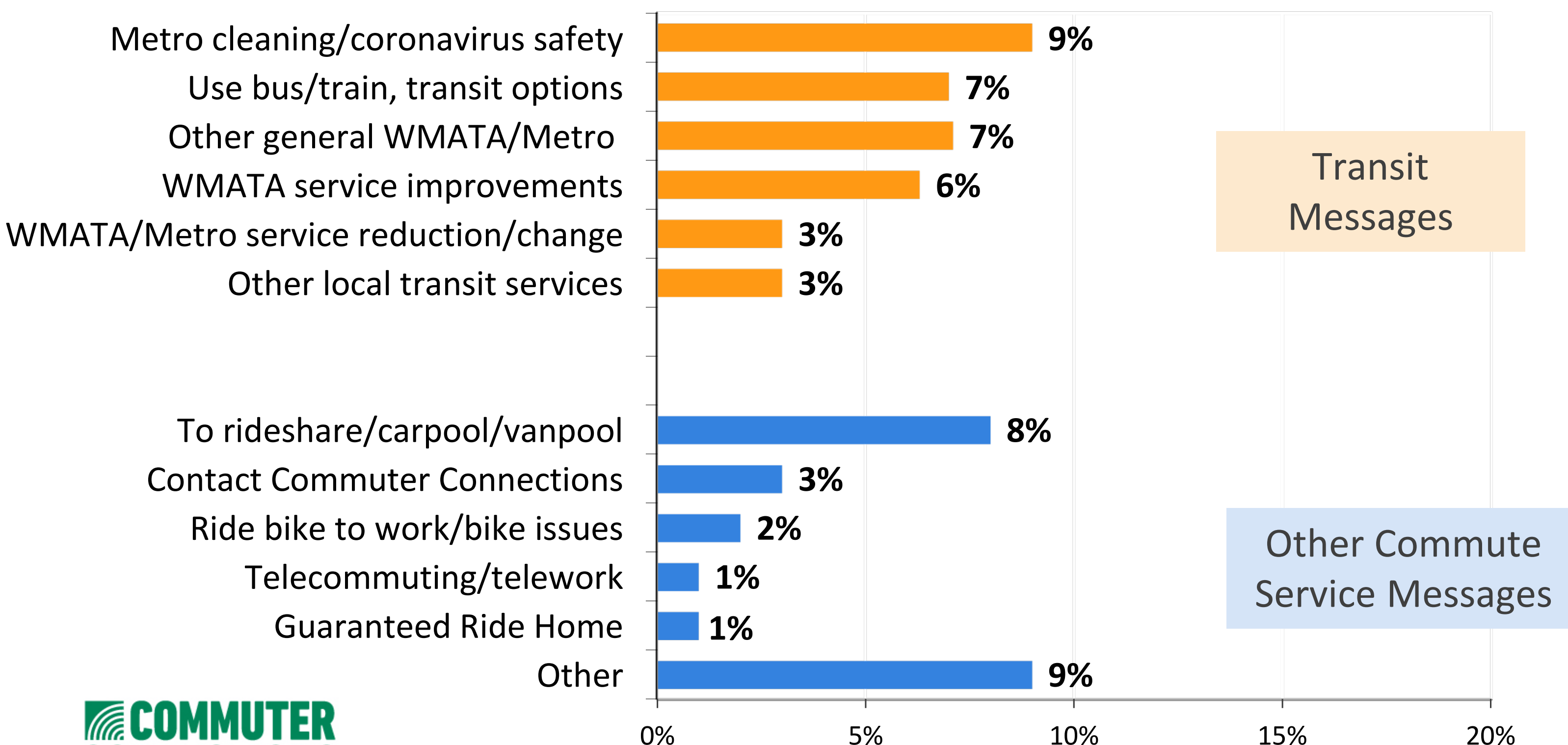
Brand Awareness

- Drop in Awareness of Commuter Connections Services
- Drop in Contacts by Commuters Aware of the Program (*11% to 5%)*
- Corelates with significant drop in ridesharing & reduced marketing campaign



Ad Recall

- 27% of Respondents Recalled Hearing/Seeing Commute Ads in the Past Year (*45% in 2019*)
- About half who were aware of ads could name a specific message
- Transit messages dominated recall (highest for pandemic measures)

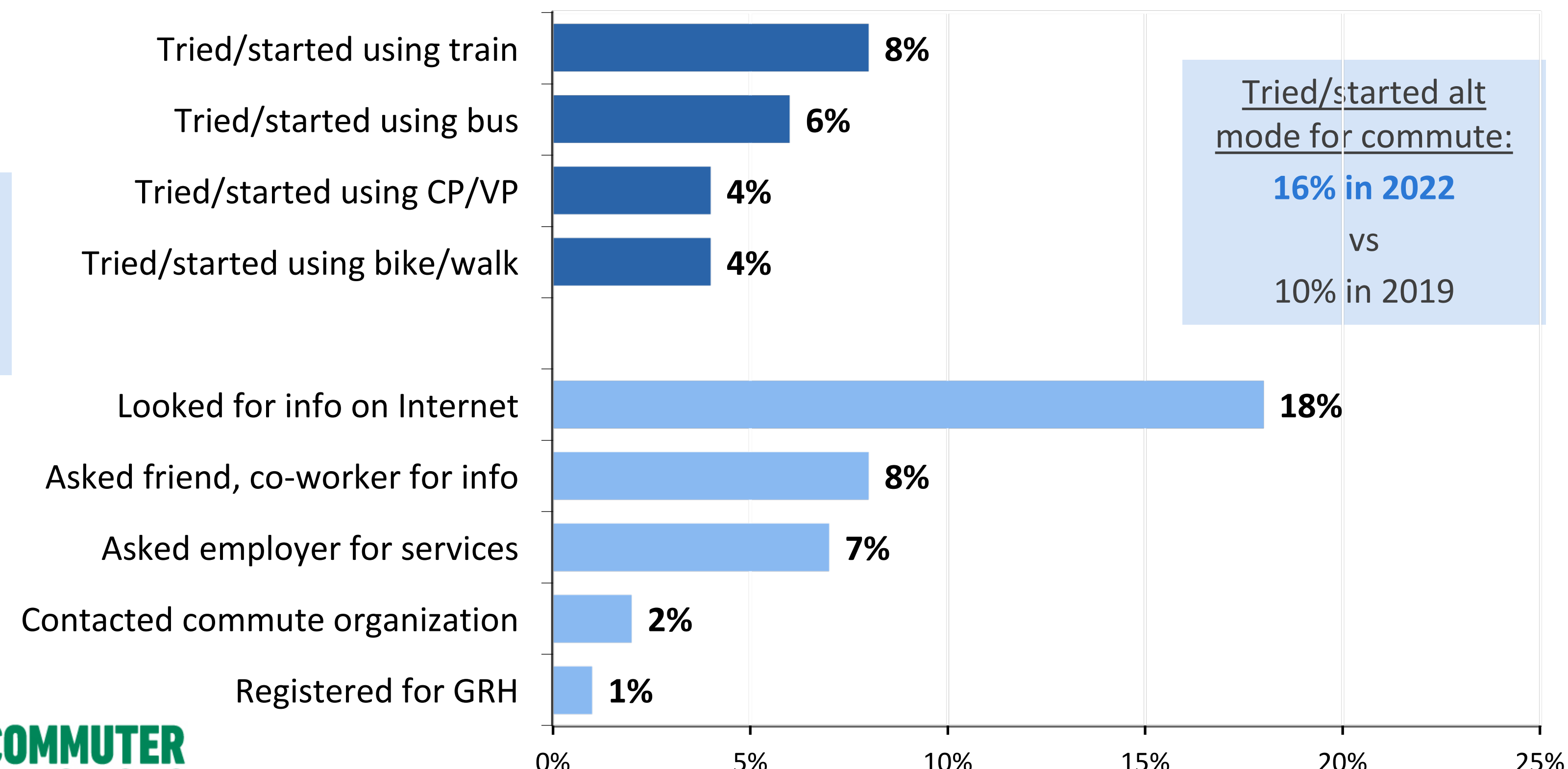


COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Actions Taken After Seeing/Hearing Ad

- 34% of Respondents who Recalled Messages Took an Action to Try to Change their Commute
- 16% who recalled ads tried or started using an alternative mode for their commute, higher than the 10% who made a mode change in 2019

35% who took action said the ad encouraged the action

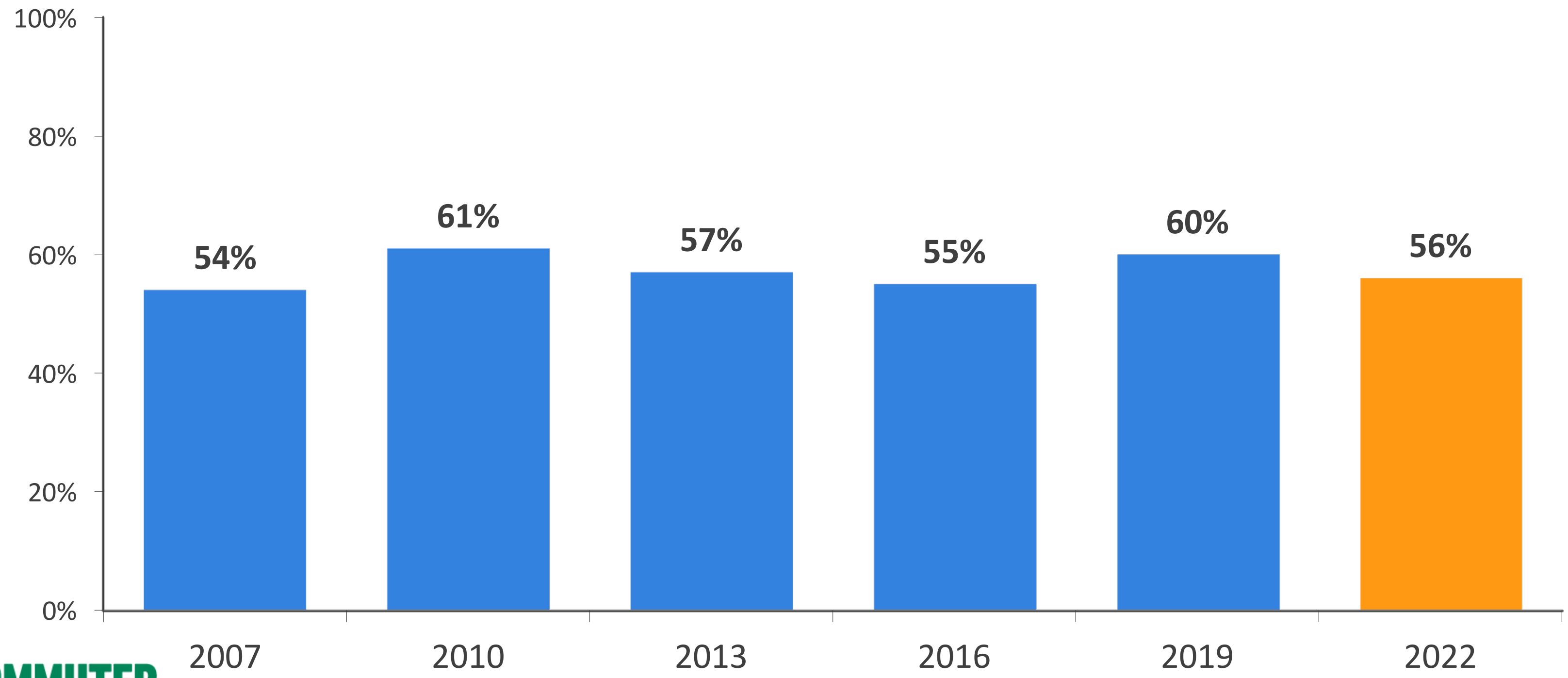


COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

Employer Commute Services Offered

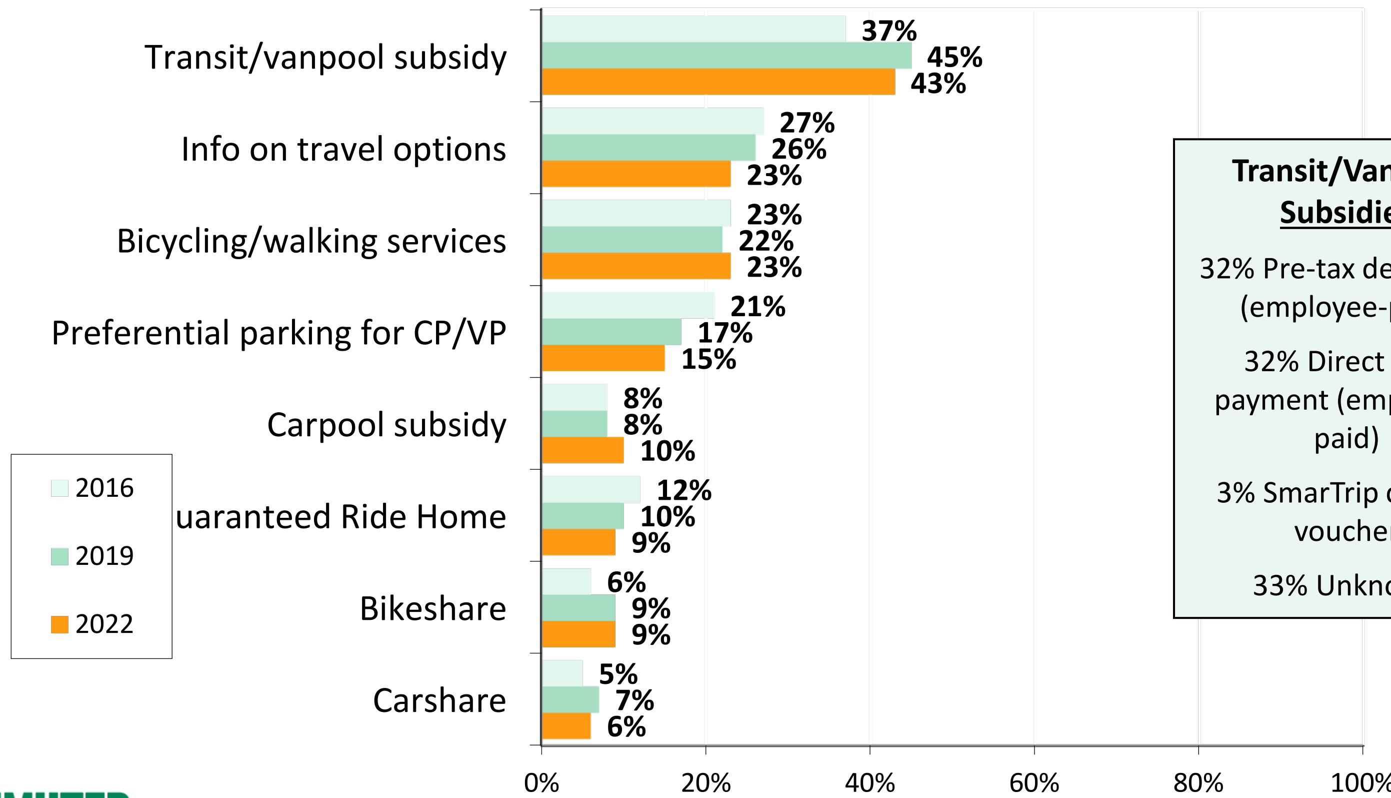
56% of Respondents Said their Employers Offered Commute Services at the Workplace

- 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



Transit/Vanpool Subsidies

32% Pre-tax deduction (employee-paid)

32% Direct cash payment (employer-paid)

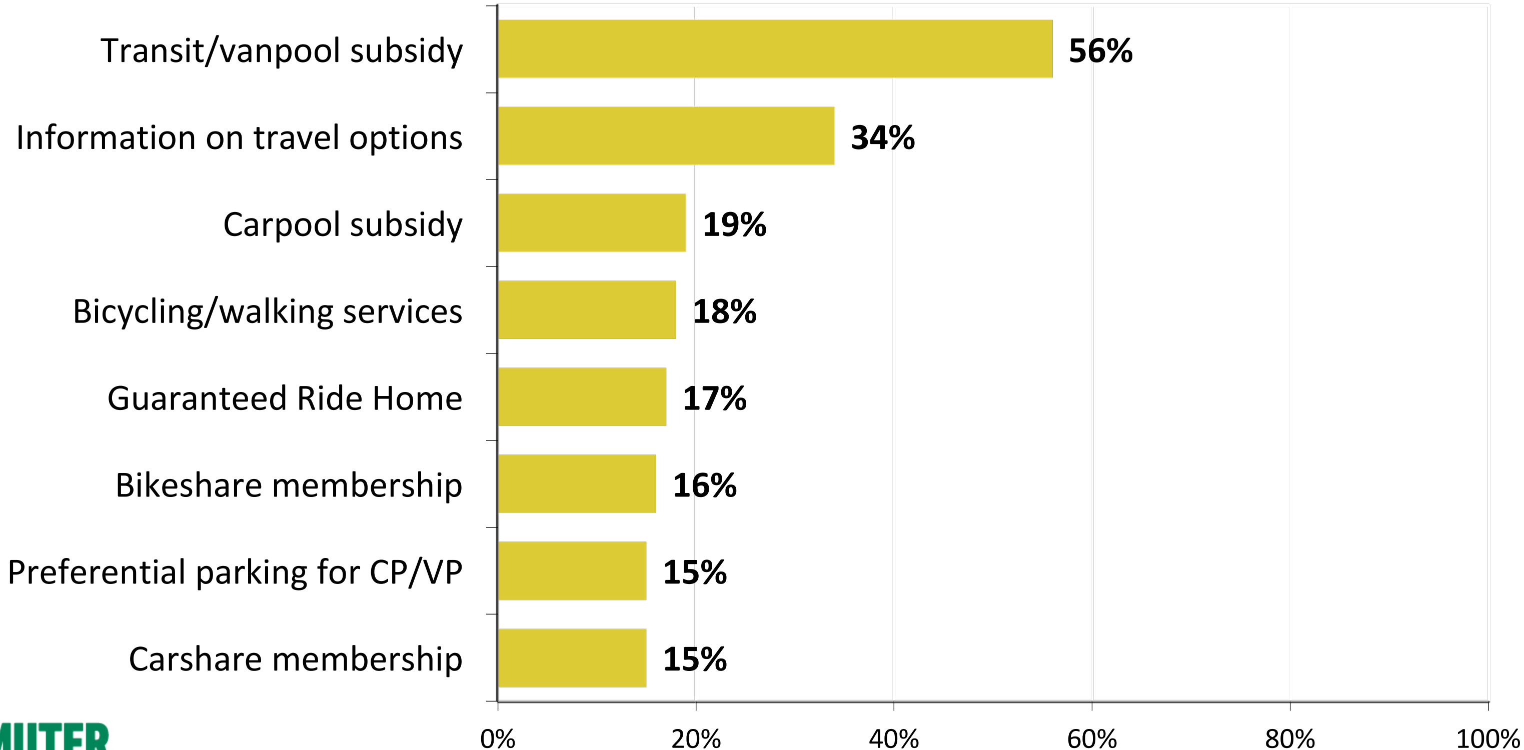
3% SmarTrip card or voucher

33% Unknown

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

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



COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

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%**

COMMUTER CONNECTIONS
A SMARTER WAY TO WORK

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)

COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK

Nicholas Ramfos

Transportation Operations Programs
Director
(202) 962-3313
nramfos@mwcog.org

commuterconnections.org

Metropolitan Washington Council of Governments
777 North Capitol Street NE, Suite 300
Washington, DC 20002

COMMUTER CONNECTIONS®
A SMARTER WAY TO WORK