



2010 State of the Commute Survey Presentation  
National Capital Region Transportation Planning Board  
July 21, 2010

# Methodology

- Fourth triennial survey (2001, 2004, 2007, 2010)
- Telephone survey of 6,629 randomly-selected employed residents of COG region (95%  $\pm$  1.2%)
- 600 in each of 11 jurisdictions (95%  $\pm$  4.0%)
- Results expanded to regional population of workers
- Also weighted to adjust sample for ethnicity
- 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
- Mass marketing awareness and influence
- Awareness of CC, regional and local commute service
- Employer commute assistance

## New Sections for 2010

- Personal / social benefits of ridesharing
- Quality of life and satisfaction

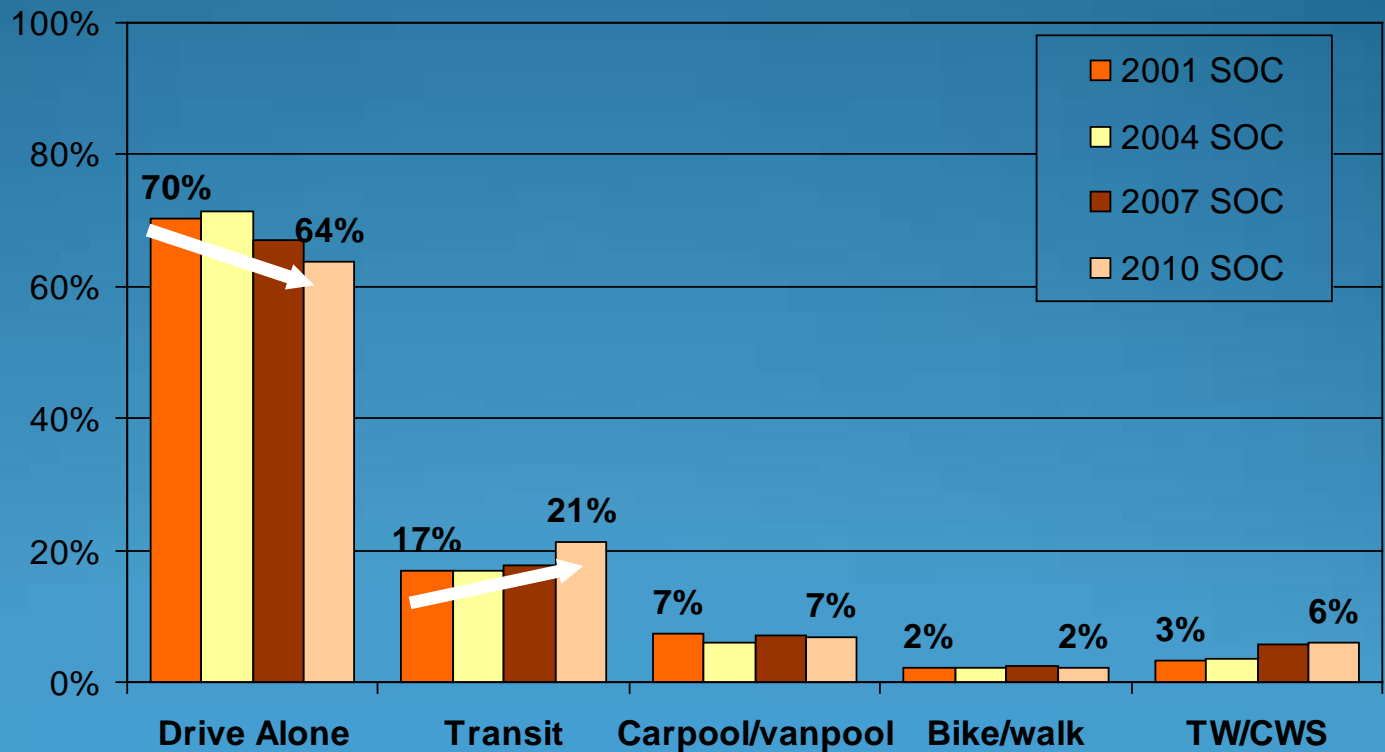


# Preliminary Highlights

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

# Commute Mode 2001, 2004, 2007, 2010

The share of drive alone trips dropped from 2001 to 2010. Transit and TW/ CWS have gained mode share since 2001; all of the increase occurred in telework



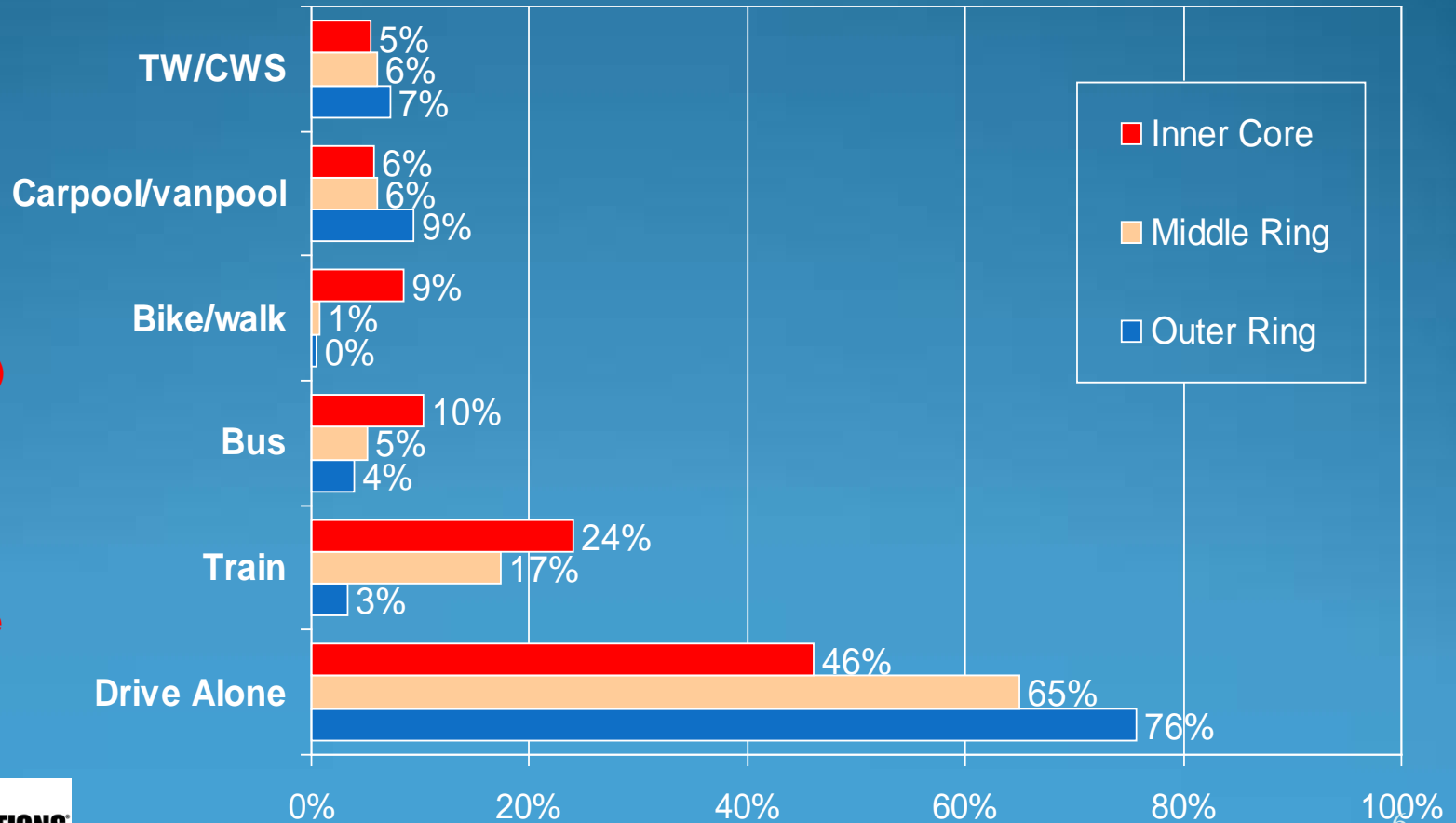
# Commute Mode by Region Sub-Area

Fewer than half of “Inner Core” area commuters drove alone, compared with 65% of commuters in the “Middle Ring” and 76% of commuters in the “Outer Ring” area

**Inner Core**  
(Alexandria,  
Arlington, DC)

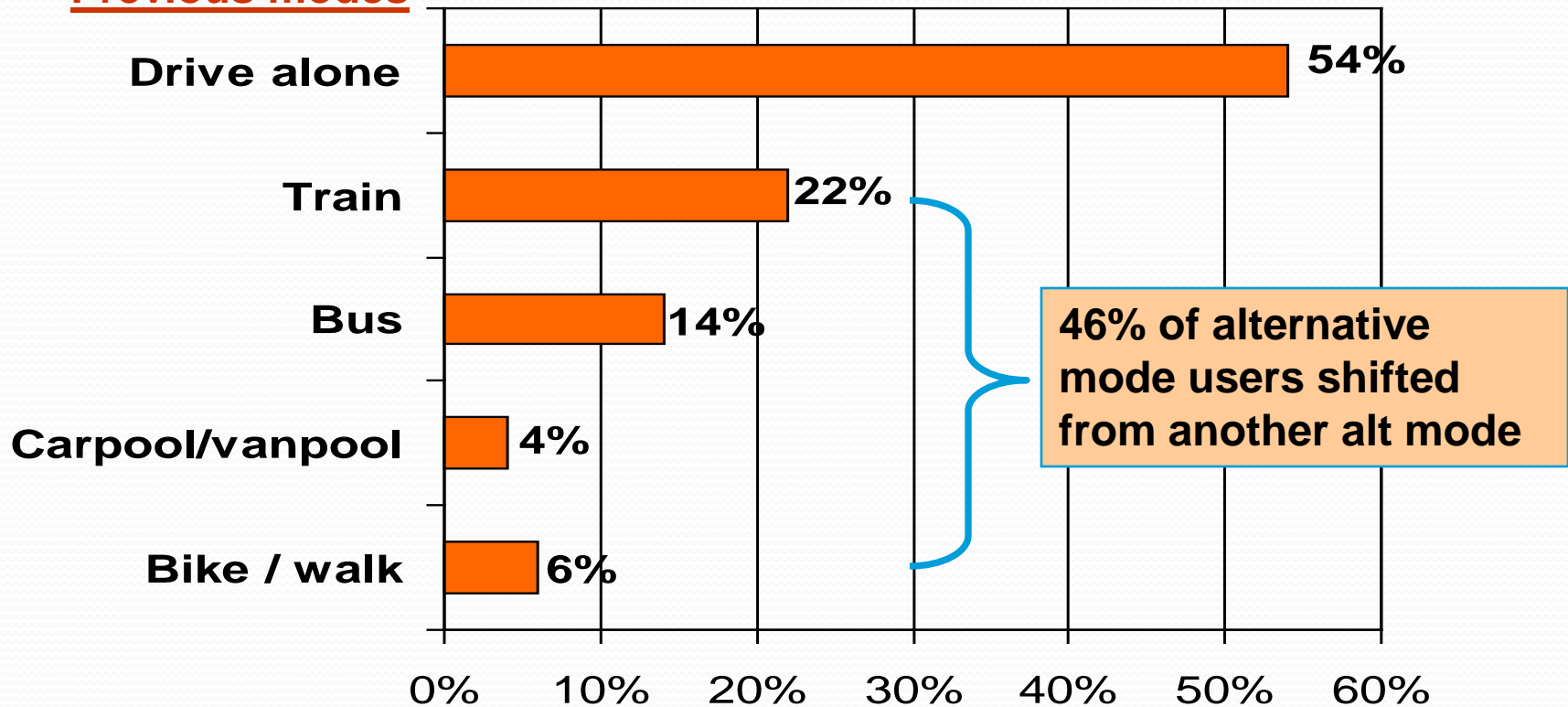
**Middle Ring**  
(Fairfax,  
Montgomery,  
Prince George's)

**Outer Ring**  
(Calvert,  
Charles,  
Frederick,  
Loudoun, Prince  
William)

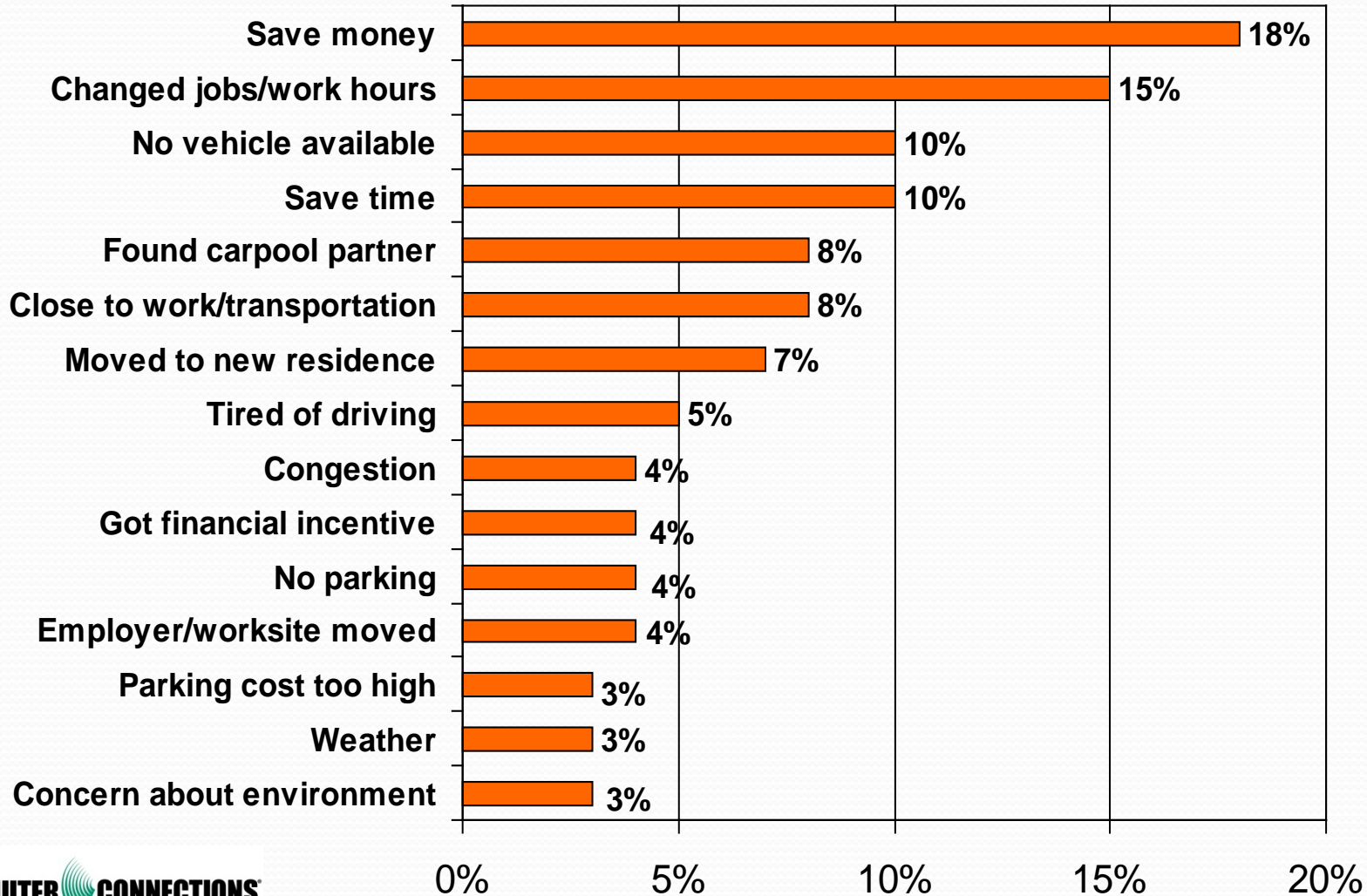


# 54% of Current Alternative Mode Users Previously Drove Alone; the remaining 46% Shifted from Another Alternative Mode

## Previous modes



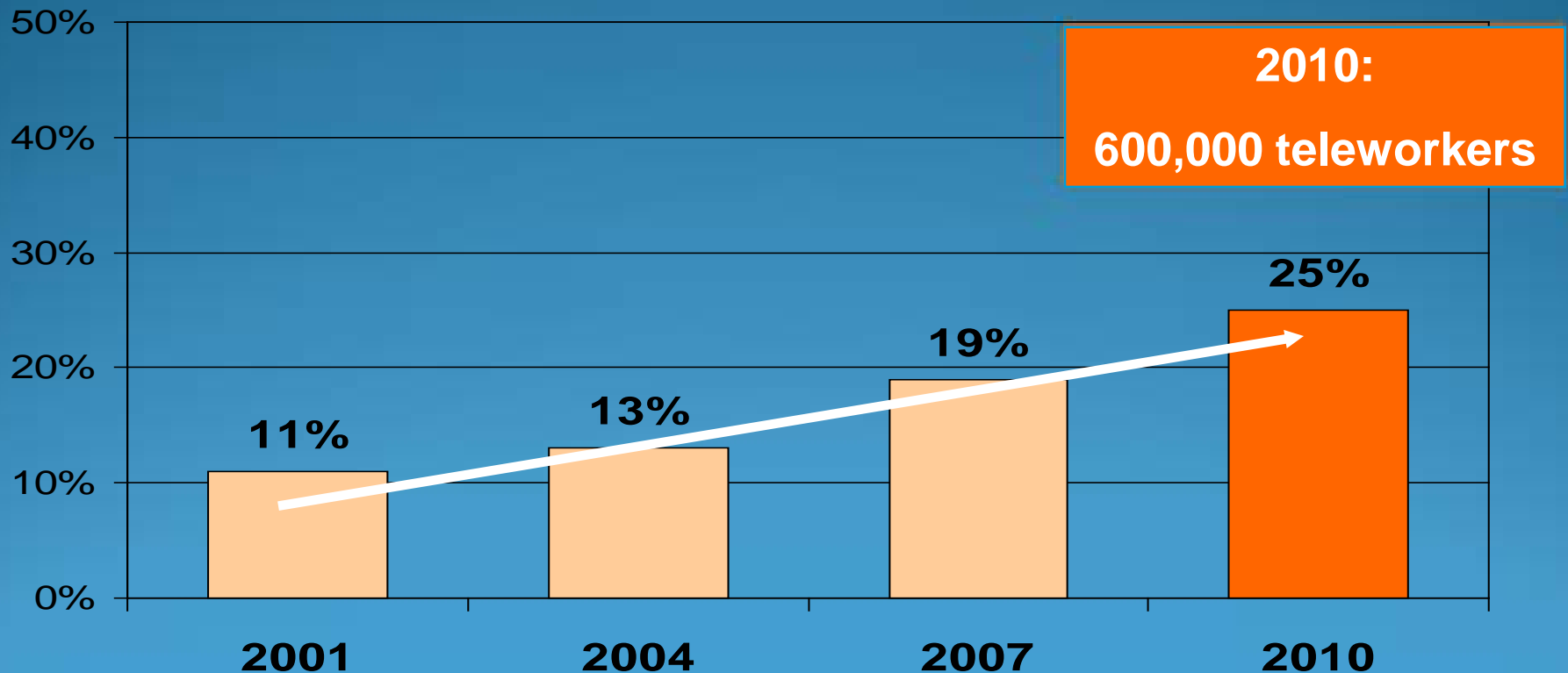
# 18% of Residents Who Use Alternative Modes for Commuting Started Using These Modes to Save Money





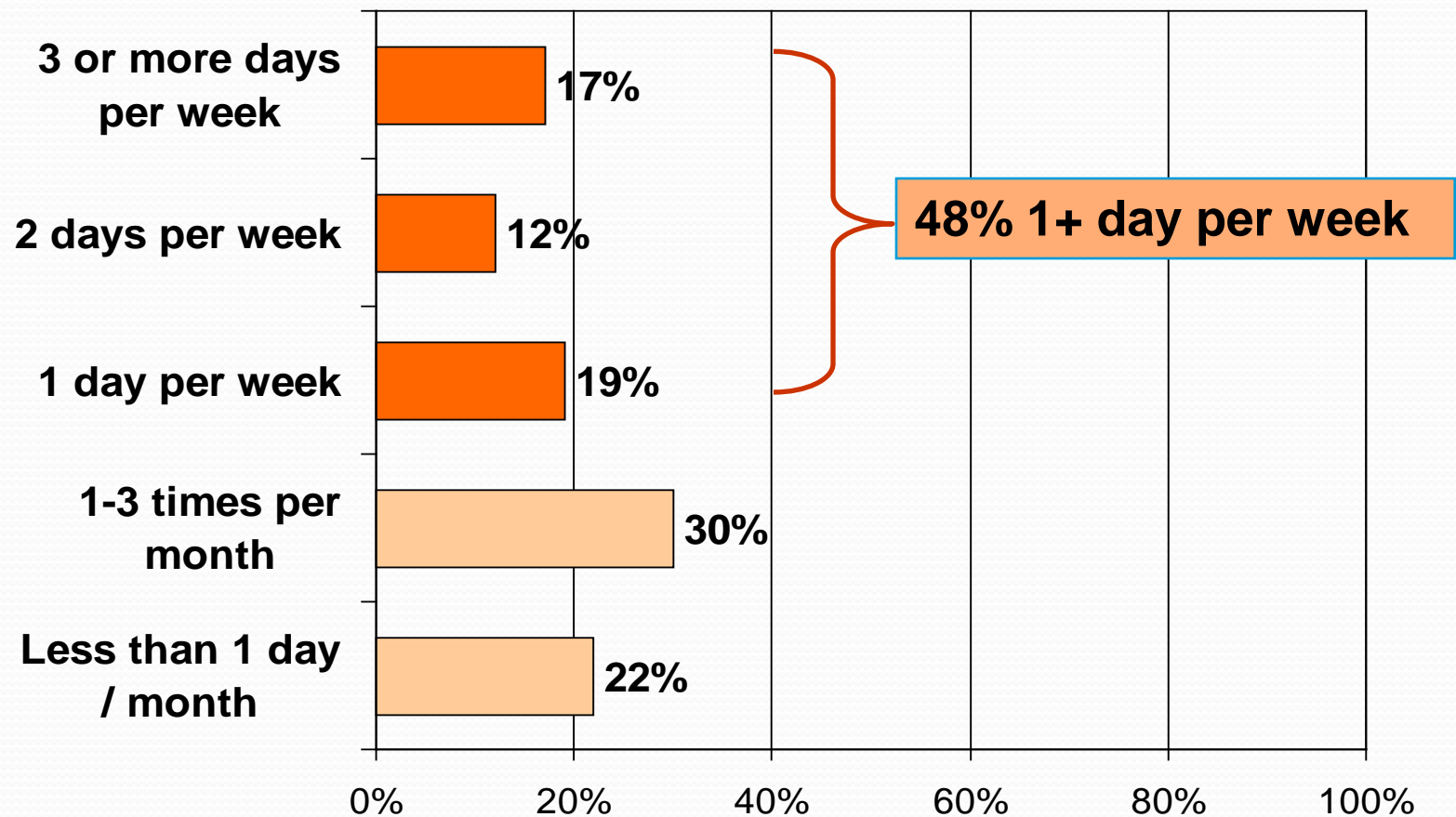
# Telework has Grown Substantially Since 2001

A quarter of regional commuters telework at least occasionally. This is more than twice the percentage who teleworked in 2001.



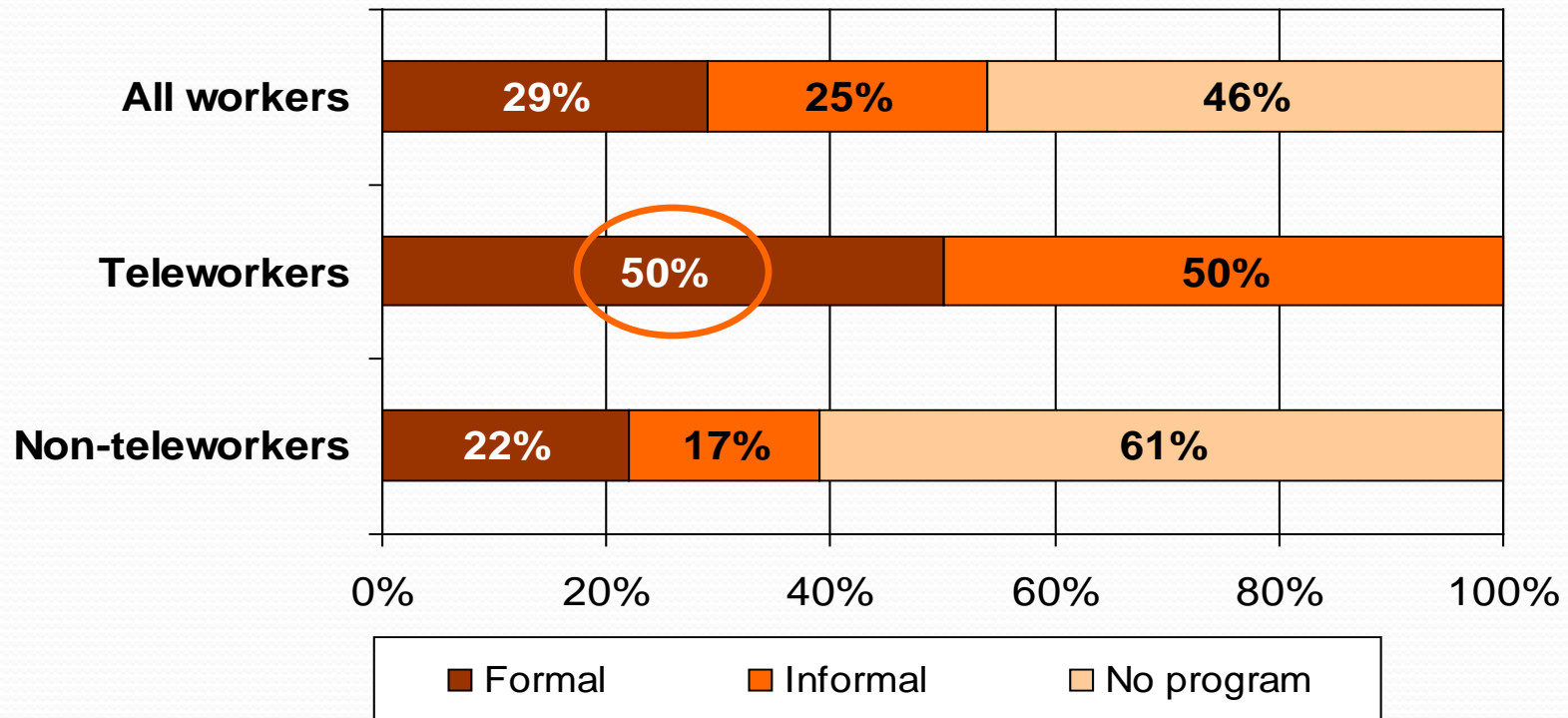
# Half of Teleworkers Telework at Least One Day per Week

The average telework frequency is 1.3 days per week

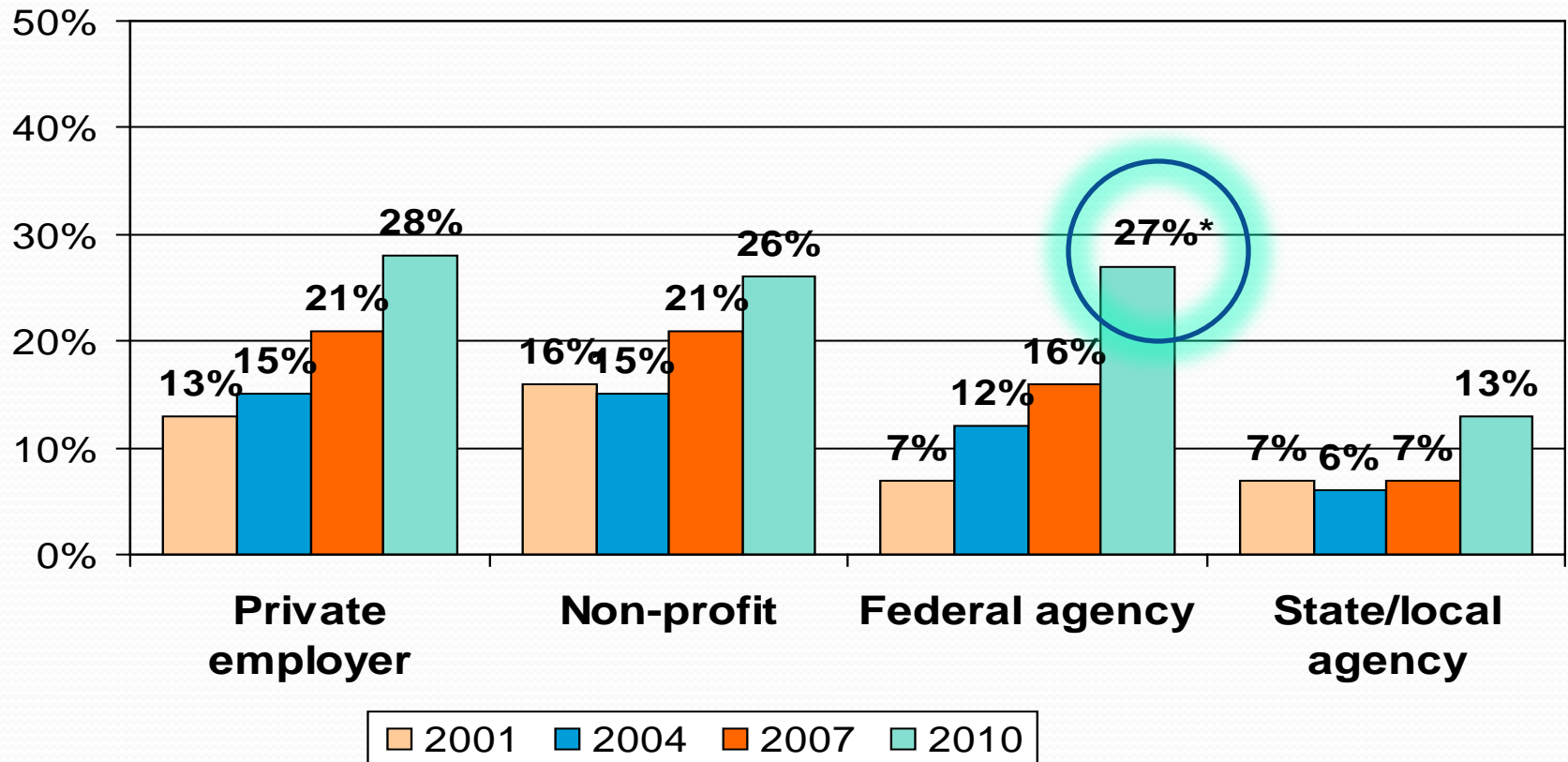


# 29% of Workers Said Their Employer has a Formal Telework Program; About Half Said the Employer Does not Allow Telework

Half of Teleworkers Telework Under a Formal Program



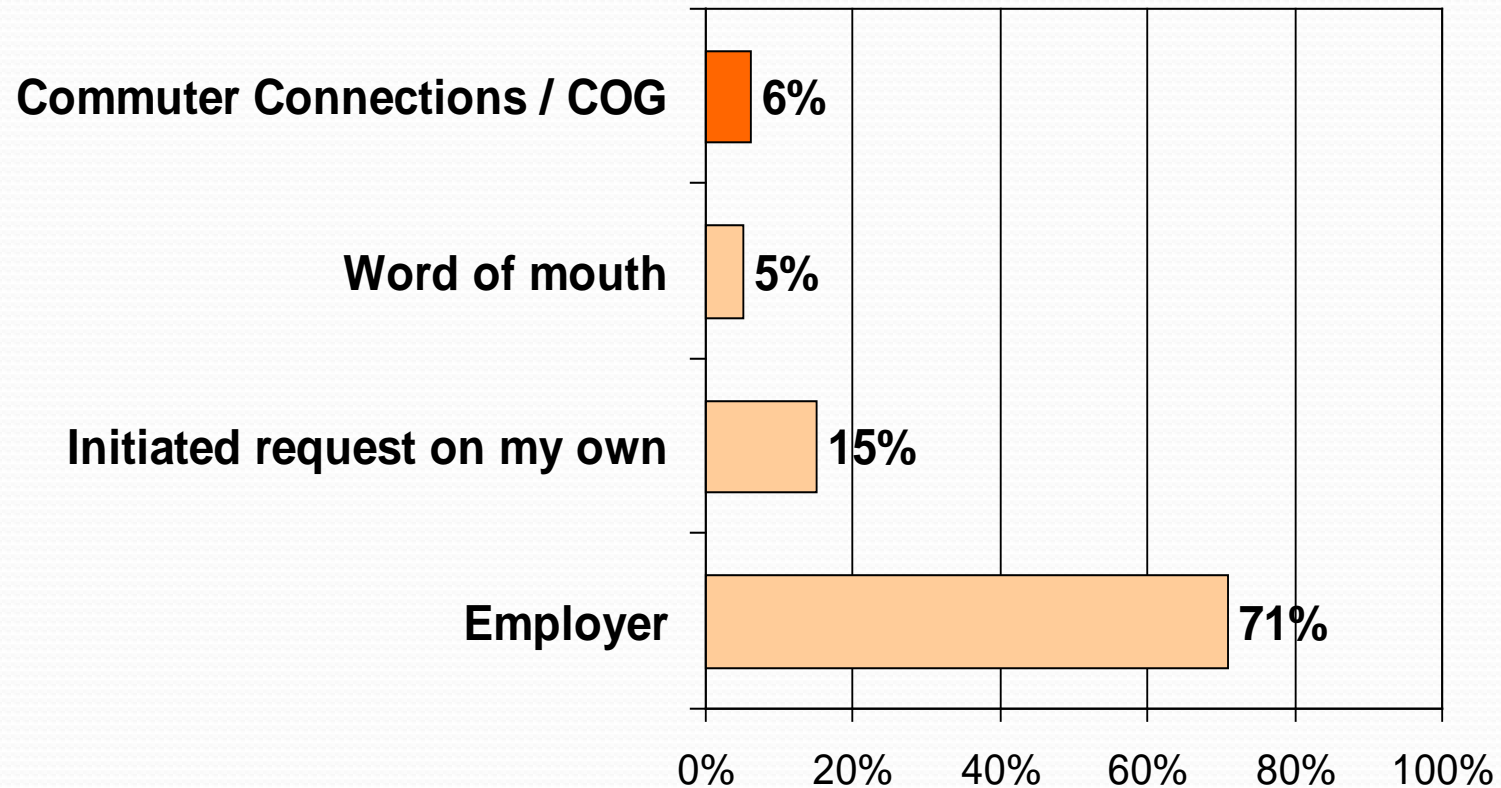
Telework has Grown in All Employer Type Groups. Since 2004, Federal agencies have more than doubled their telework percentage.



\*Federal Teleworking was reported to be 10% nationwide as part of OPM's 2010 Federal Employee Viewpoint Survey

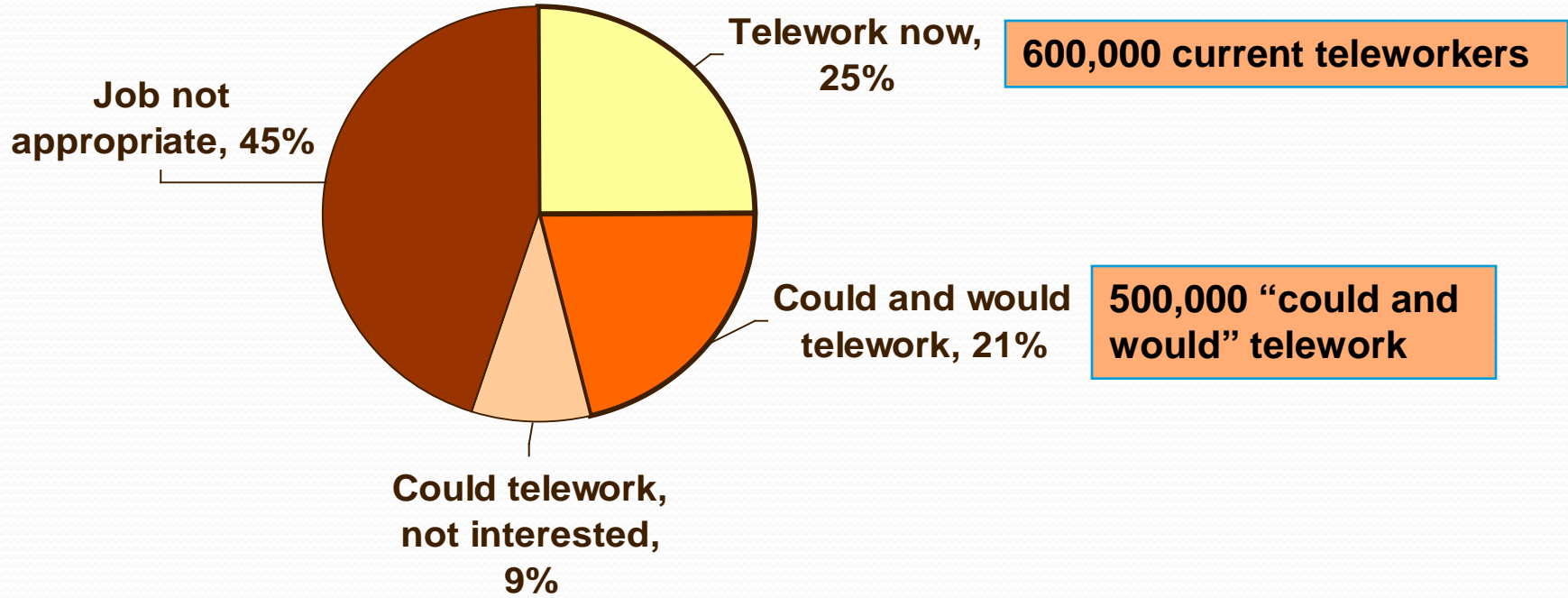
# About Six Percent of Teleworkers Received Telework Information from Commuter Connections

Most Learned about TW from their Employer



# Potential for 500,000 New Teleworkers

21% of workers “could and would” telework – that is, they have job responsibilities that could be performed through telework and they would like to telework if given the opportunity.



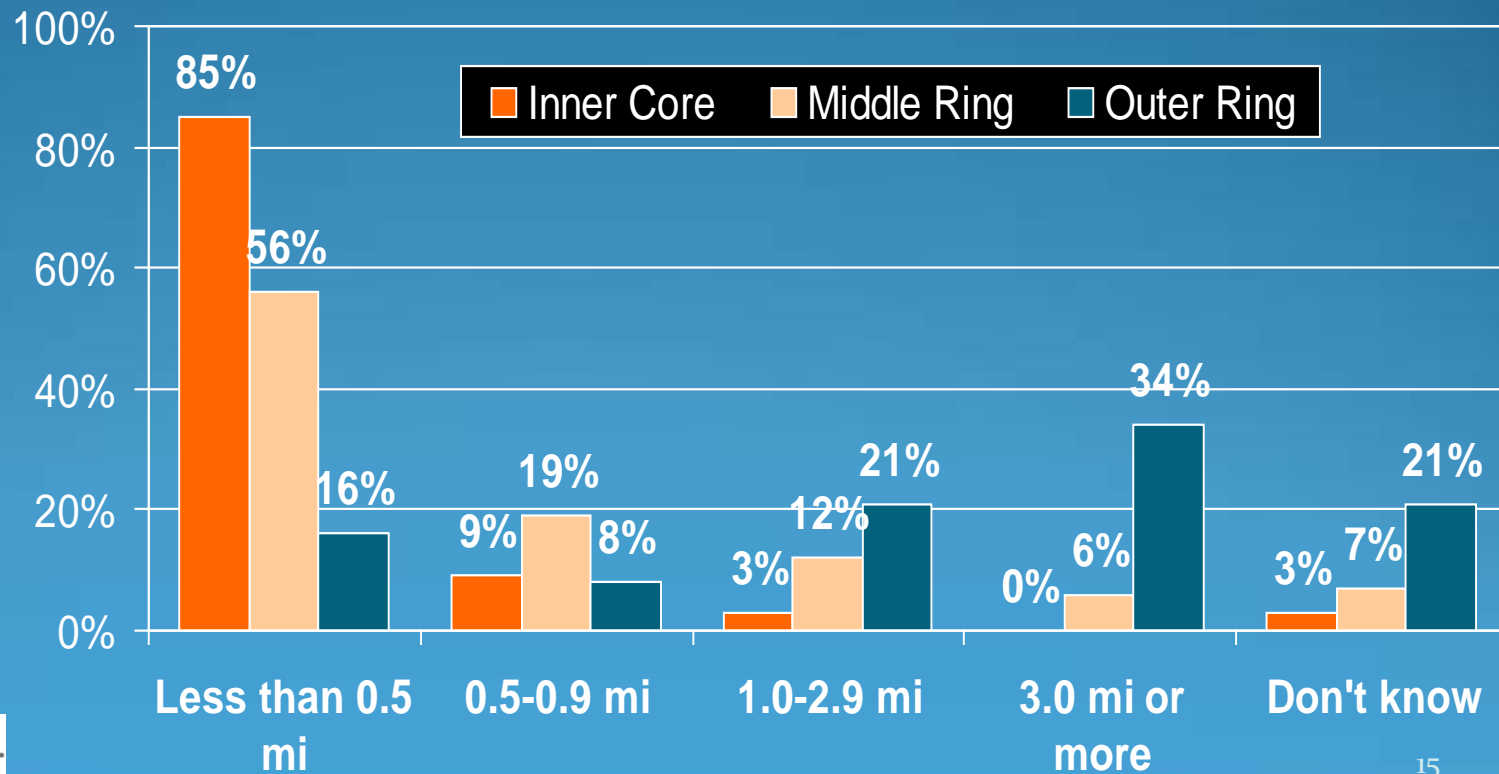
# Bus and Train Access By Area of Region

More than eight in ten respondents who lived in the “Inner Core” area of the region lived within ½ mile of a bus stop. In the “Middle Ring” area, about six in ten had a bus stop within ½ mile. Fewer than two in ten residents of “Outer Ring” jurisdictions had close access to bus.

**Inner Core**  
(Alexandria, Arlington, DC)

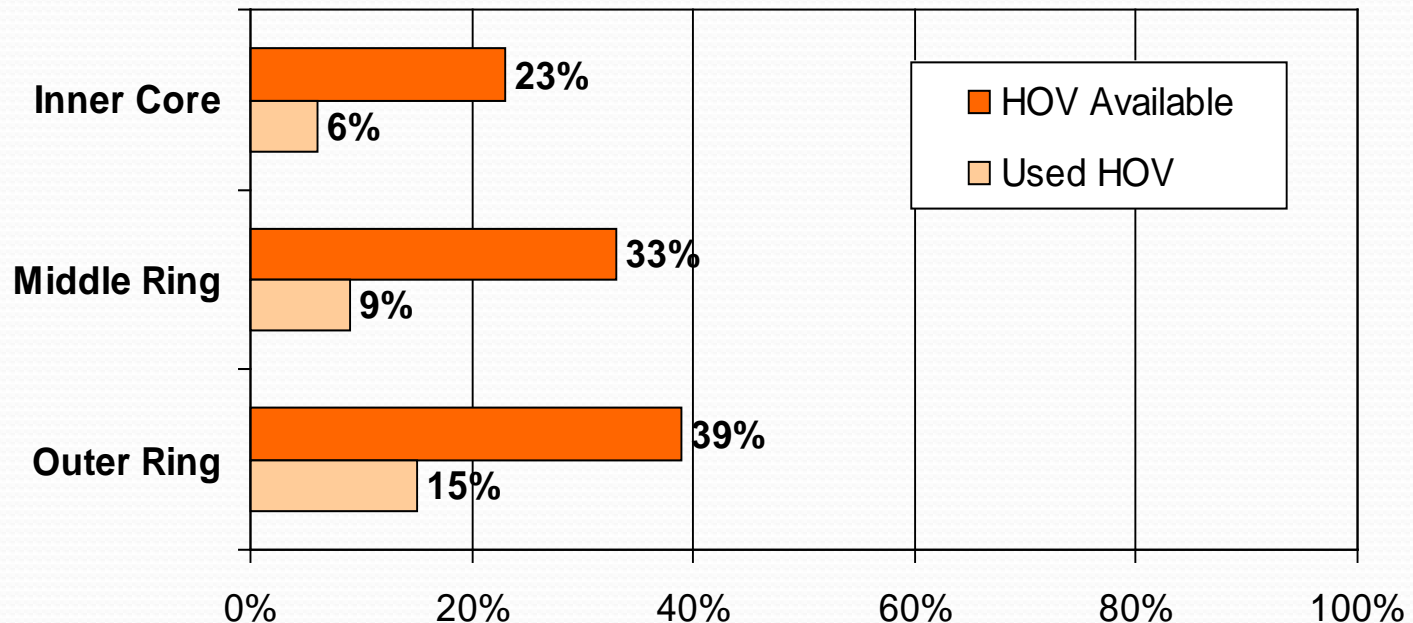
**Middle Ring**  
(Fairfax, Montgomery, Prince George's)

**Outer Ring**  
(Calvert, Charles, Frederick, Loudoun, Prince William)



# Availability and Use of HOV by Area of Region

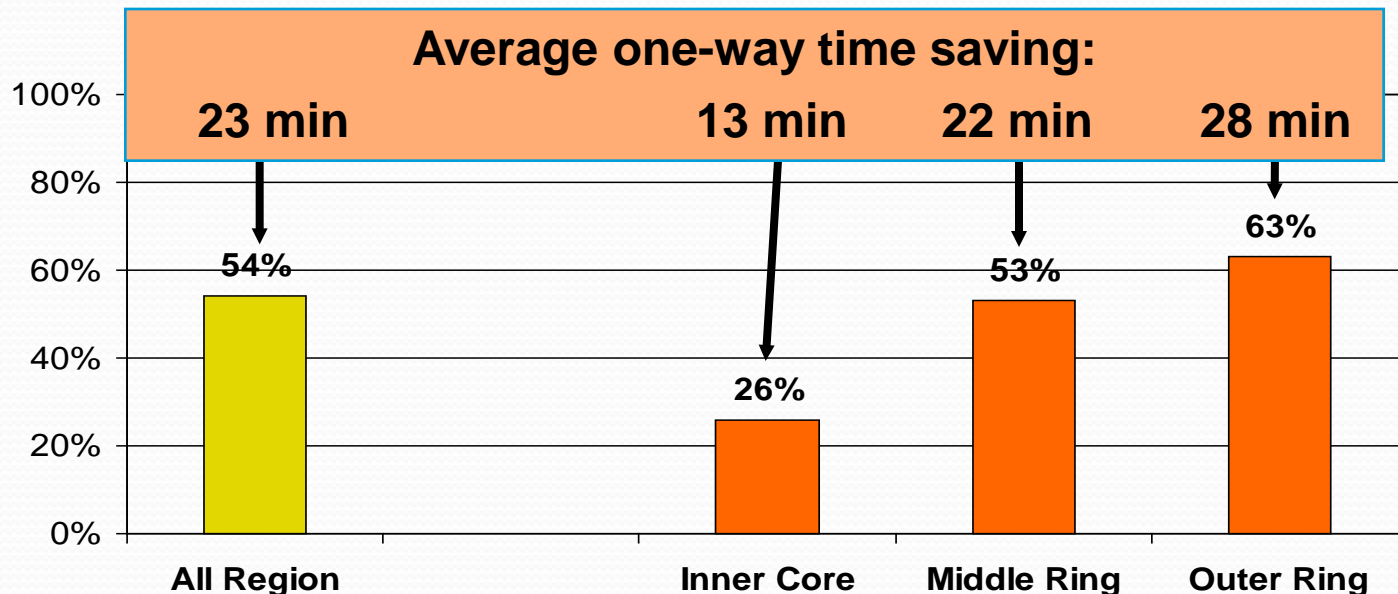
Commuters who lived in outer jurisdictions were more likely to say they have HOV lanes available on their route to work. They also were more likely to use them, when they were available. Commuters in the Inner Core and Middle Rings used HOV lanes at about the same rate.





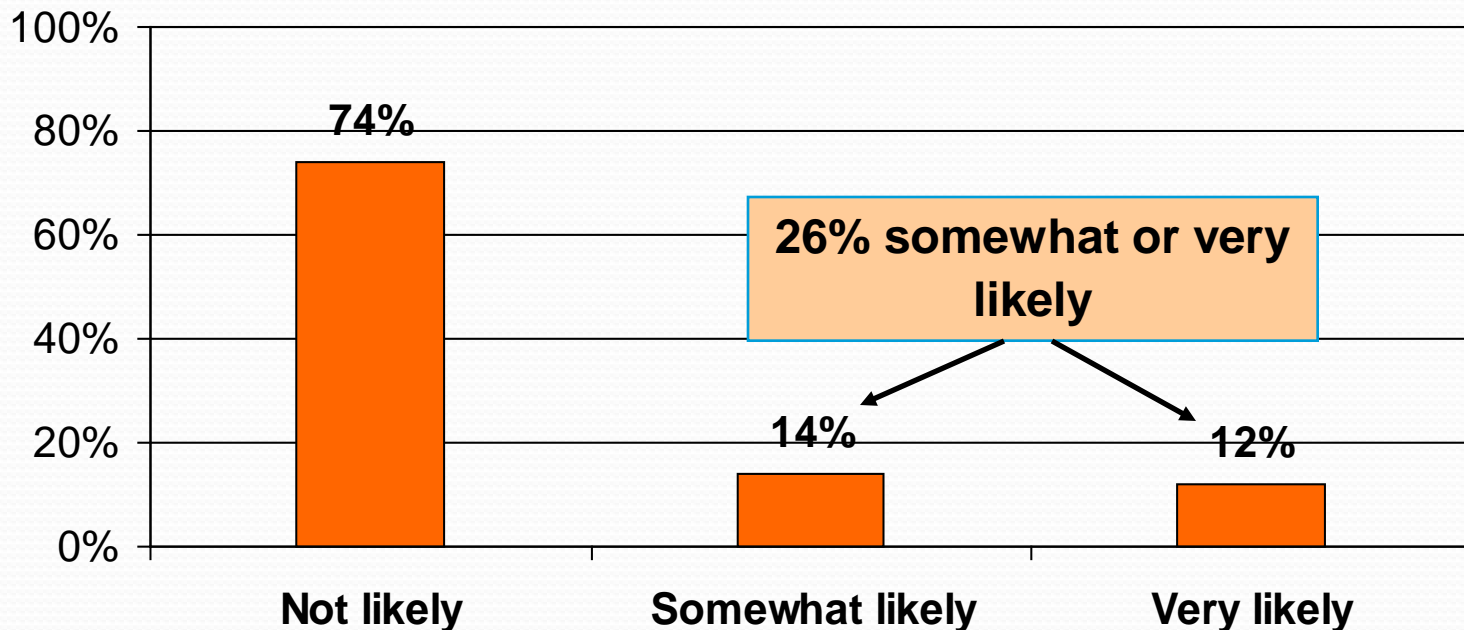
# HOV Lanes Had Greater Mode Influence for Commuters in the Middle/Outer Rings

More than half of HOV users who lived in the Middle Ring and 63% who lived in the Outer Ring said HOV lanes influenced their decision to use alternative modes. These commuters had greater time savings from HOV lanes than did Core residents.

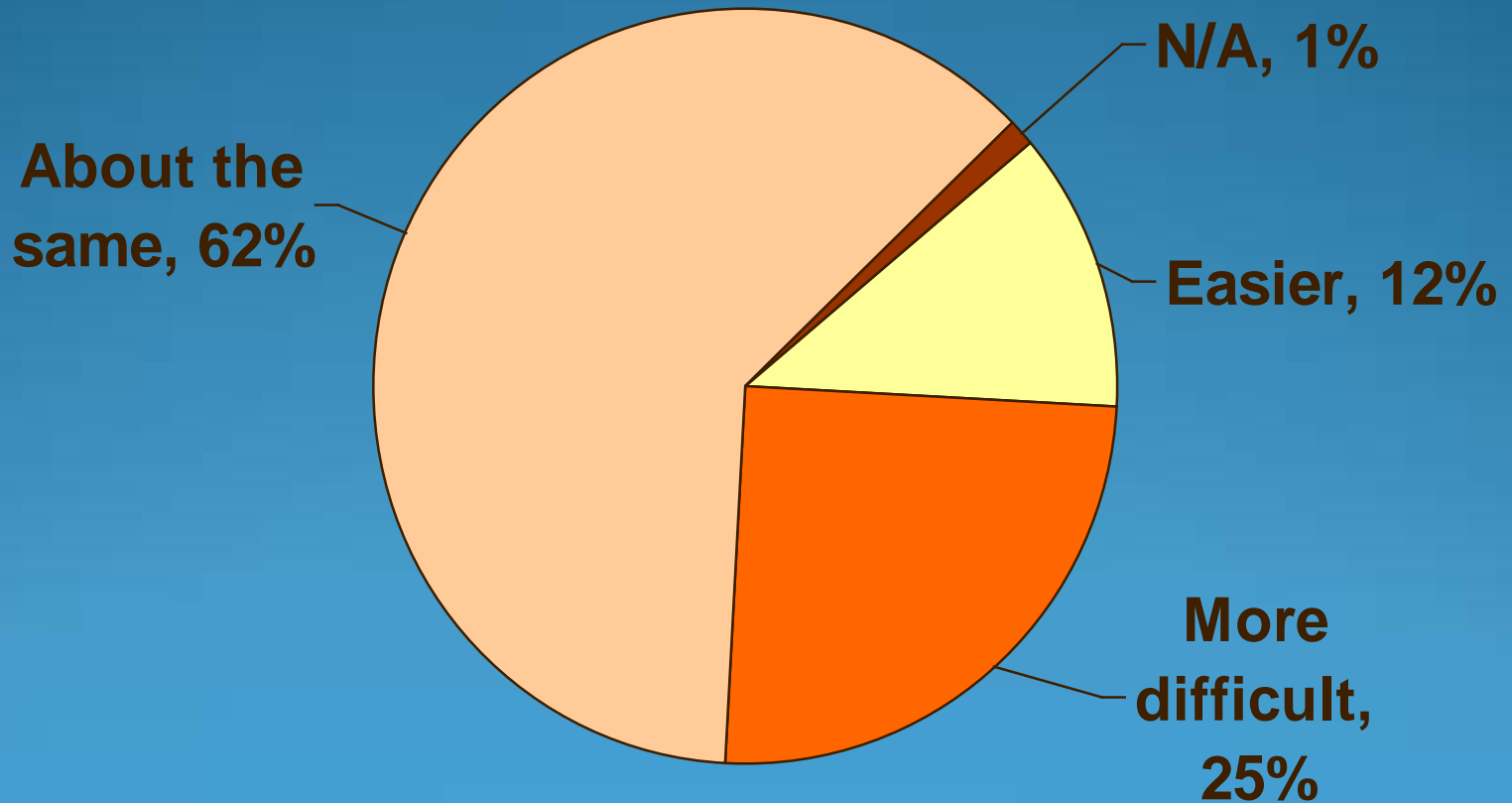


# 26% of Drive Alone Commuters would Consider Ridesharing to Use HOT Lanes for Free

Commuters who drove alone were asked how likely they would be to try carpooling or vanpooling if carpools/vanpools traveled for free or a reduced rate on High Occupancy Toll (HOT) lanes. 26% were somewhat or very likely to try.

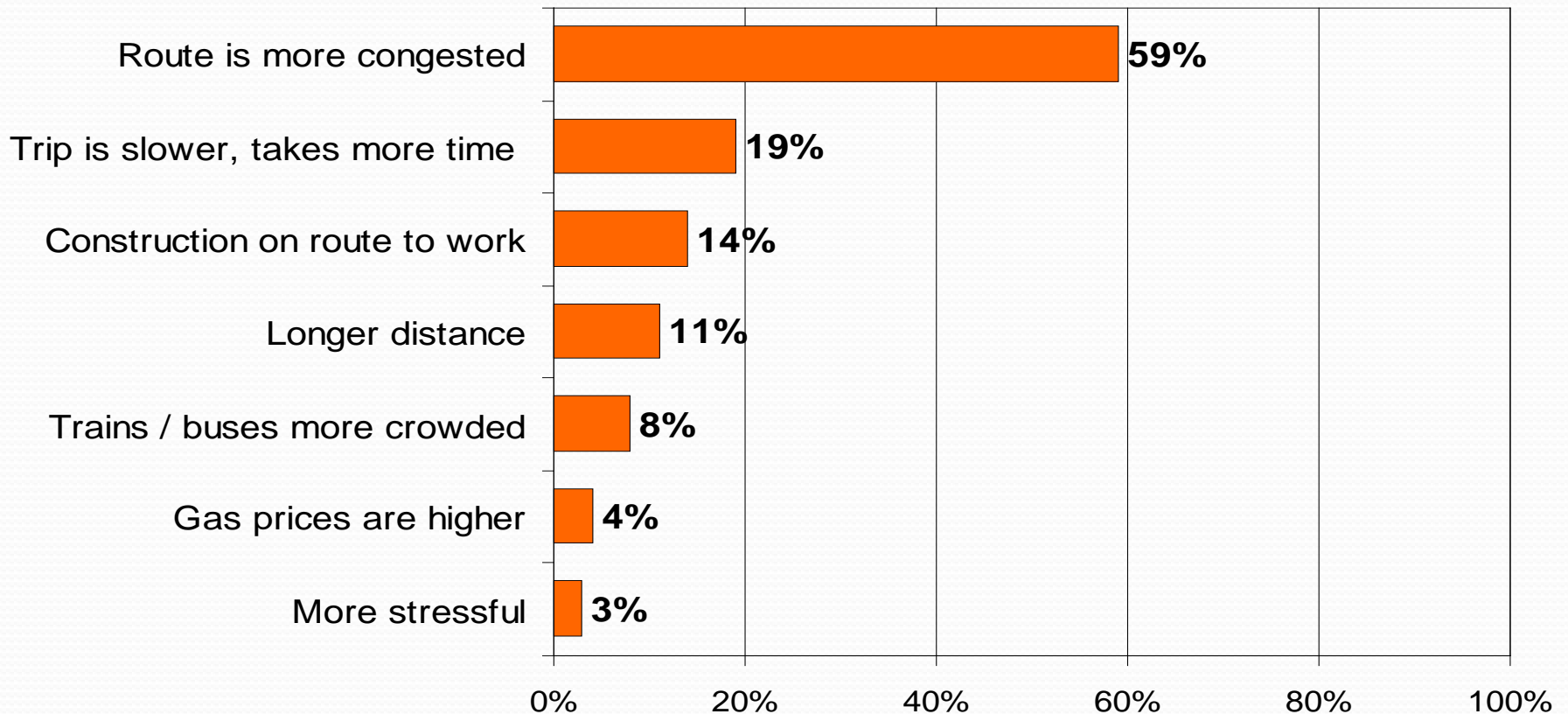


# A Quarter of Commuters Said their Commute was More Difficult than a Year Ago, While 12% Have an Easier Commute



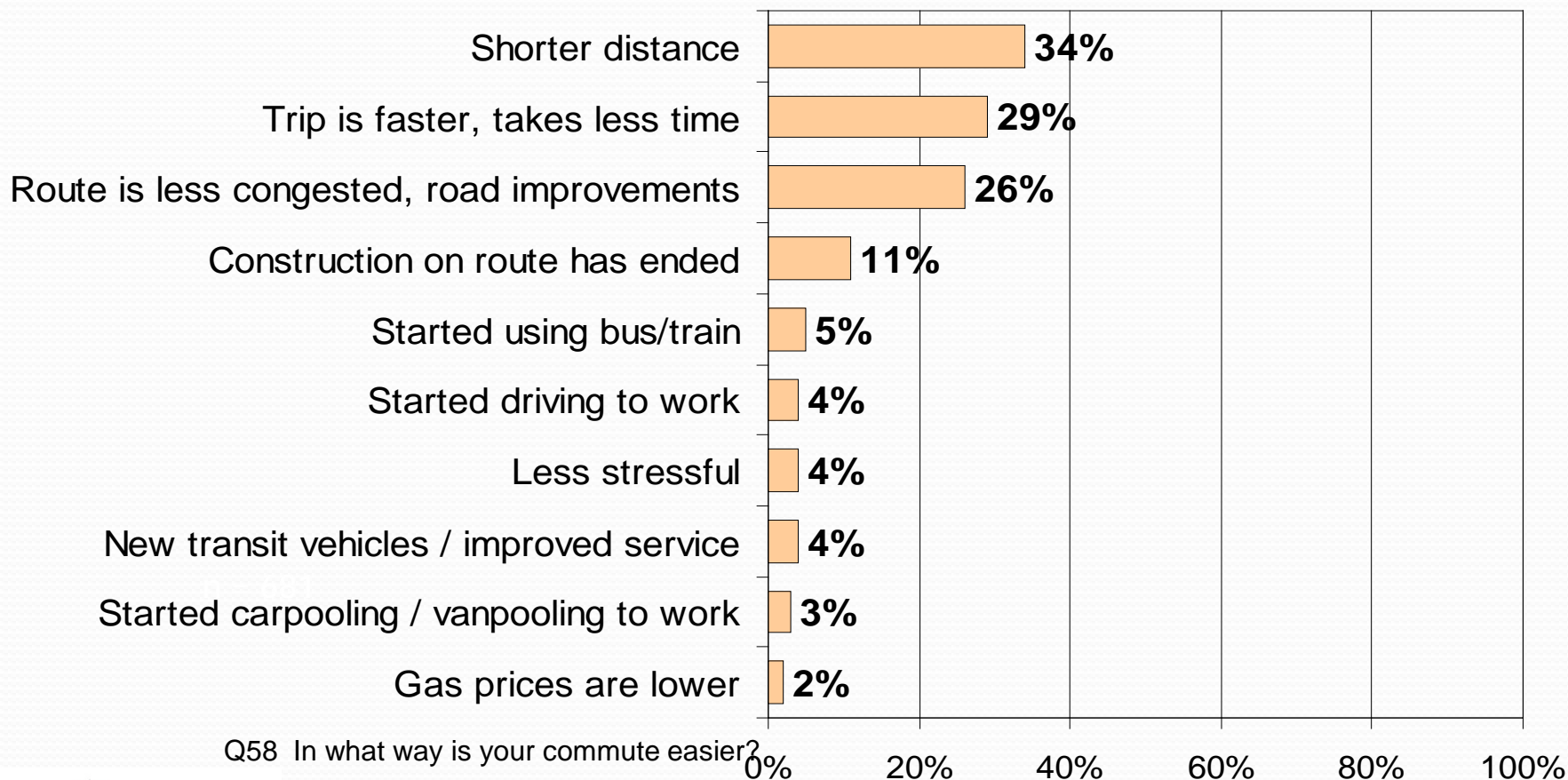
# Respondents who Had More Difficult Commutes Overwhelmingly Said the Route was More Congested

14% noted construction along the route to work



# Respondents who Had Easier Commutes Said the Distance was Shorter, the Time Faster, or the Route Less Congested

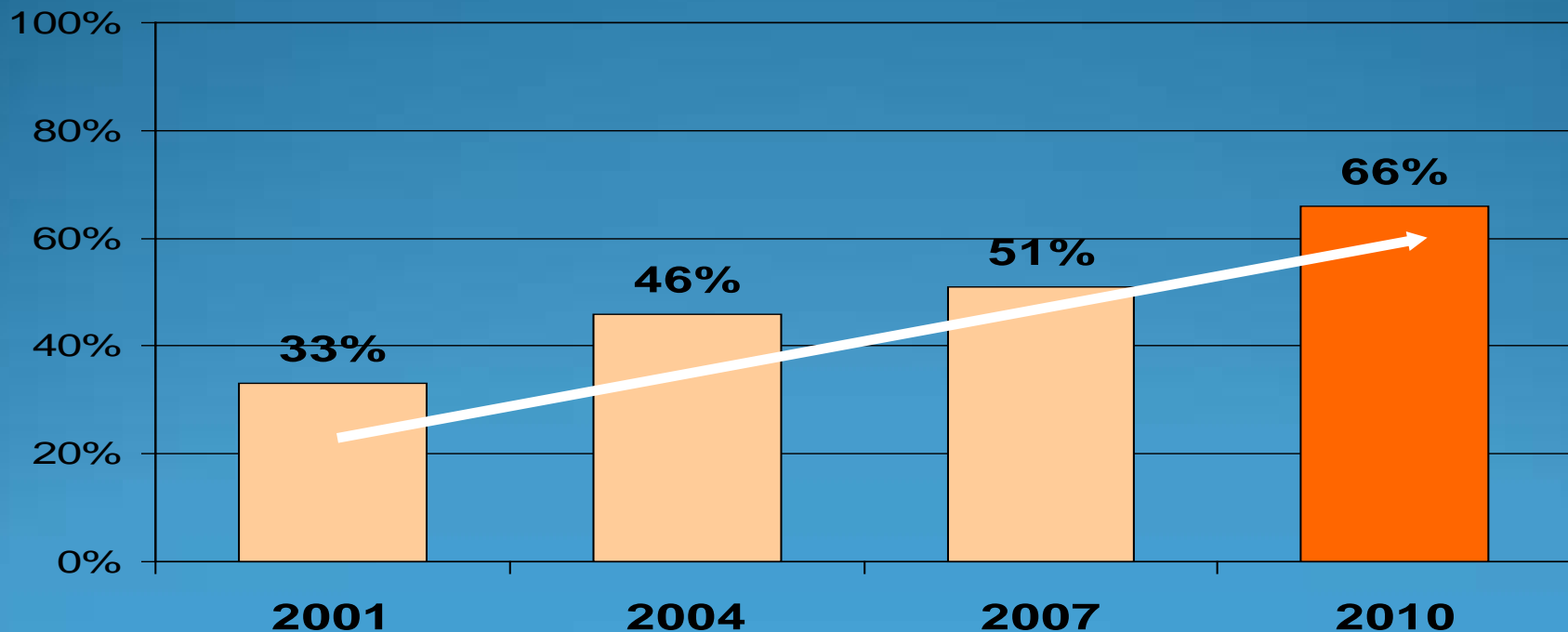
11% noted that construction along the route had been completed



Q58 In what way is your commute easier?

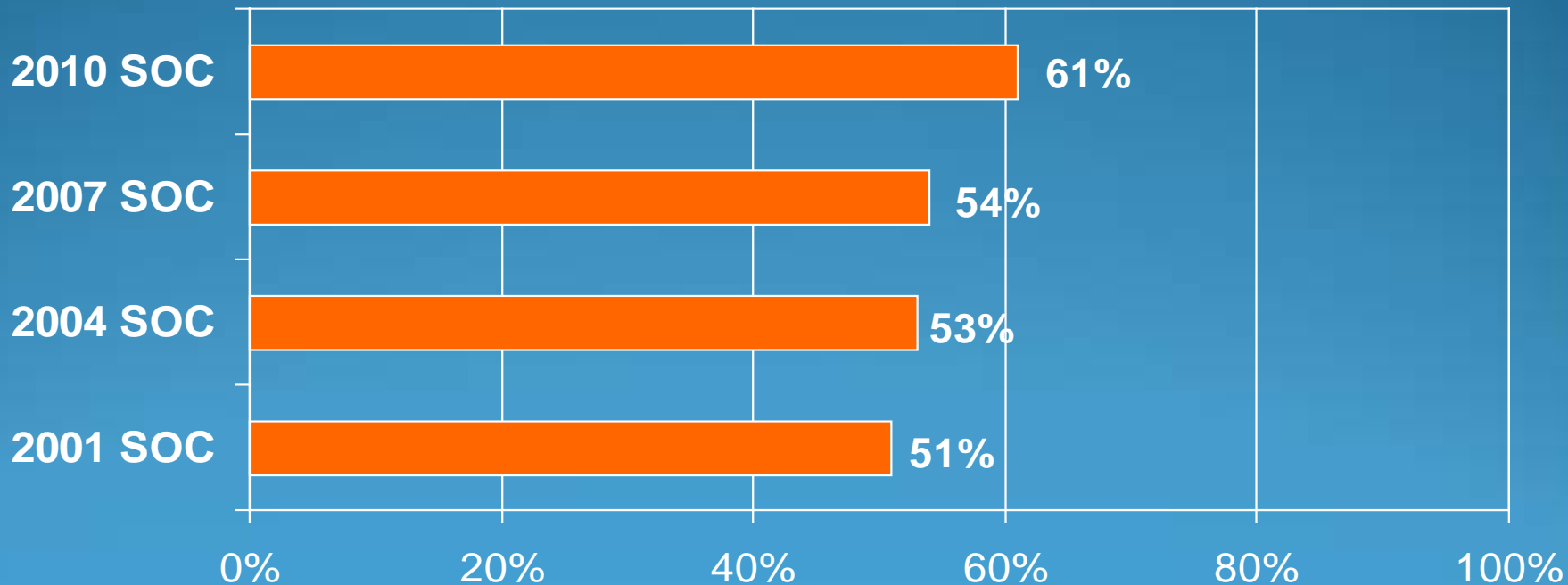
# Awareness of Regional Commute Information Resources has Grown Since 2001

In 2010, 66% of respondents said there was a telephone number or web site for commute information, higher than the 51% who knew of these resources in 2007 and twice as high as the 33% of respondents who knew of these resources in 2001.



# Access to Employer Commute Services

–Six in ten respondents (61%) who traveled to a worksite away from home said their employers offered one or more alternative mode incentive or support services to employees at their worksites. This was higher than the 54% who noted having worksite services in 2007.



# Next Steps

- Review of Technical Report/Comment Period
- Finalize Technical Report in FY 2011
- Prepare and Publish General Public Report in 2011



# Questions?

Nicholas Ramfos

202-962-3313

[nramfos@mwkog.org](mailto:nramfos@mwkog.org)