

2025 STATE OF THE COMMUTE

What the Data Tells Us About How Our Region Is Moving, and What It Means for Residents and Businesses

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April 8, 2026

2025

State of the Commute Executive Summary

Photo by Pierre Gaunard/COG

FAST FACTS



Commuter Connections conducts a regional State of the Commute survey every three years—the 2025 survey is the ninth one.



The results provide a comprehensive look at how people travel to and from work, providing info to help shape Commuter Connections' free services and programs and informing area officials.



The survey randomly sampled households from each of the 11 jurisdictions in the Commuter Connections service area.



Over 7,500 completed surveys were received between April-June 2025.

Commuter Connections Service Area



HIGHLIGHTS

- Commuters' transportation modes have generally returned to pre-pandemic patterns, except for higher rates of telework in 2025.
- Almost half of the region's workers—48%—teleworked regularly in 2025, down from 65% in 2022 during the pandemic.
- Metrorail satisfaction increased by 16 percentage points from 2022 to 2025.

Photo by ART Arlington Transit



Point your phone's camera at the QR code and follow the link to the 2025 State of the Commute interactive dashboard and full report.



What Is The State Of The Commute?

The Region's Most Complete Picture of How People Get to Work

- Triennial survey of 7,500+ regional workers across DC, Maryland, and Virginia
- The first fully post-pandemic snapshot of commute behavior
- Answers the questions many are asking:
 - Is traffic getting worse?
 - Is transit getting better?
 - Is working from home here to stay?

Image: 2025 State of the Commute Executive Summary

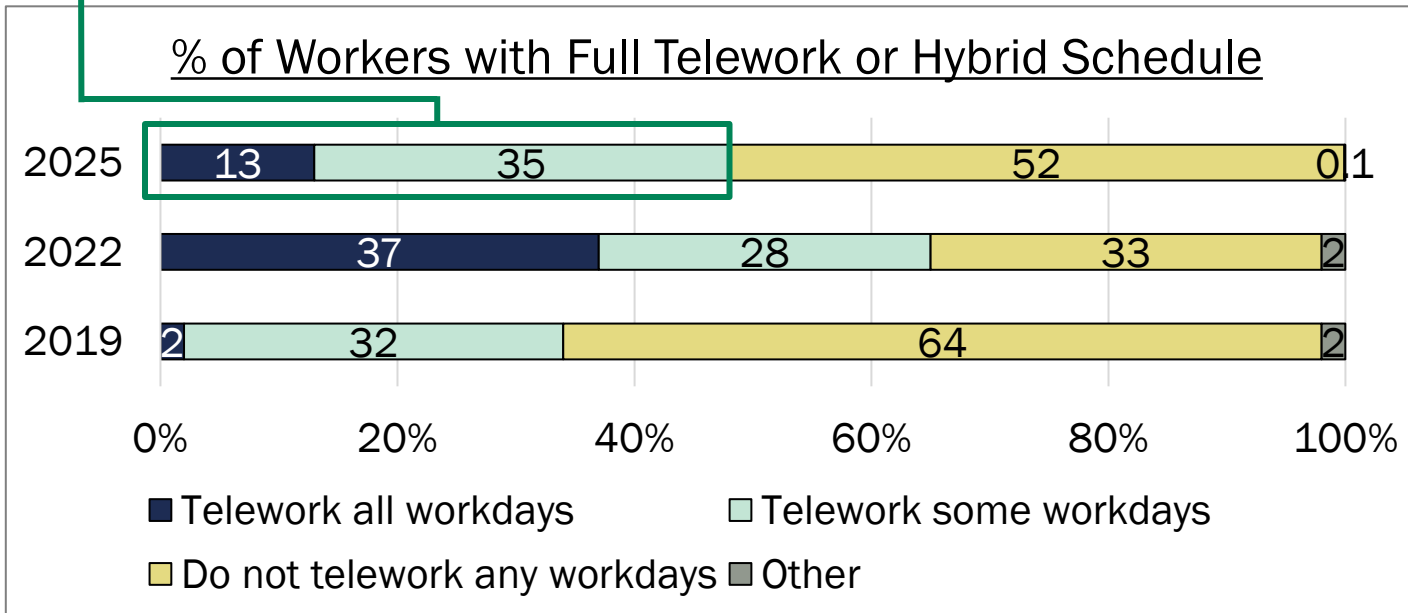
A Region in Transition

	2019 (pre-pandemic) <i>Jan 11 - Apr 13</i>	2022 (mid-pandemic) <i>Jan 6 - Mar 17</i>	2025 (post-pandemic) <i>Mar 27 - Jun 26</i>
Economy	Strong, low unemployment (3.1%)	Sluggish, COVID disruptions	Stabilizing, return-to-office underway
Telework	Uncommon (34%)	“Peak telework” (65%)	Elevated but settling (48%)
Traffic	High congestion	Dramatically reduced	Growing, especially mid-week
Transit	Strong ridership	Severe service cuts	Recovering, satisfaction rising

The region is finding a new normal, and this survey shows us what it looks like.

Telework Is Here to Stay

- Nearly half of regional workers still telework, reshaping when and how people commute
 - **48%** of regional workers telework, either fully or hybrid
 - **35%** of hybrid workers telework 3+ days/week, more than double the pre-pandemic rate
 - **1.6 million** daily commute trips eliminated by telework



Emerging Trend

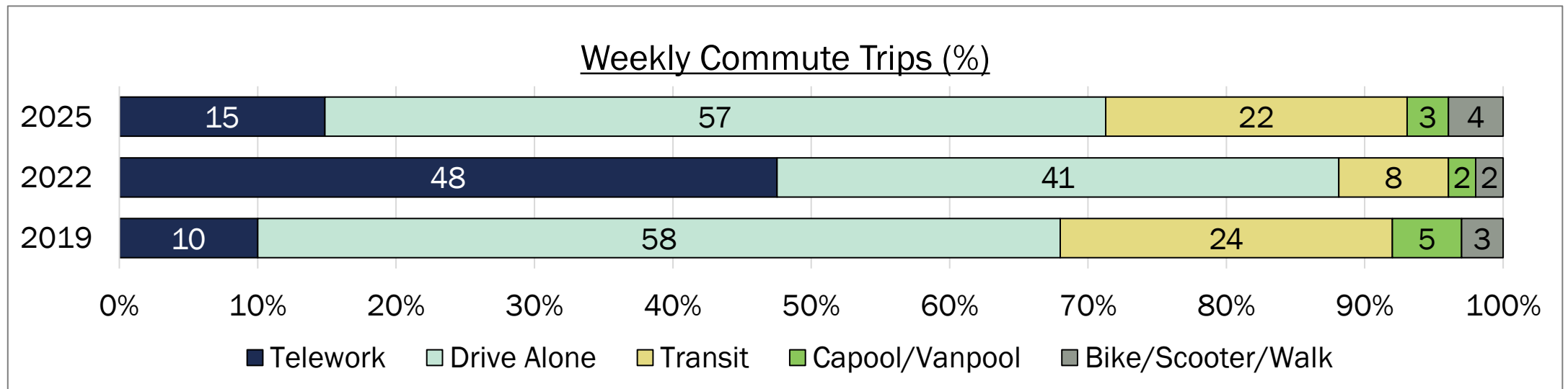
Mid-week commutes (Tuesday, Wednesday, Thursday) may become the new rush hour.

Notable Nuance

Federal workers are the exception. Federal telework dropped from **79% → 23%**, the sharpest decline of any sector.

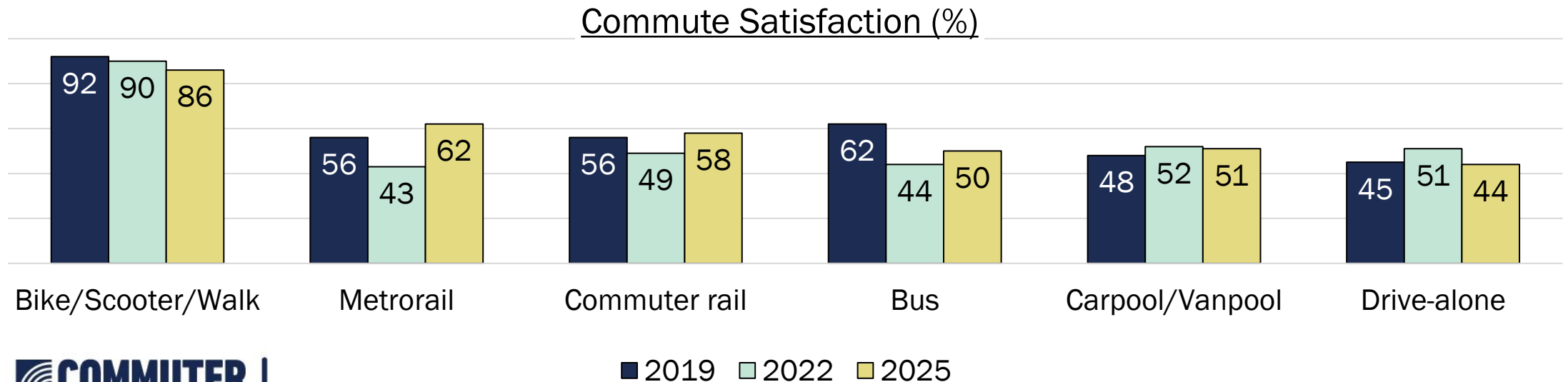
How People Are Getting to Work

- **Drive-alone is growing.** A 16-point rebound since 2022 (41% → 57%)
 - Without continued investment in alternatives, congestion will also keep growing
- **Transit is recovering.** A 14-point rebound since 2022 (8% → 22%)
 - Growth in transit commuting is largely due to reliability improvements and restored service



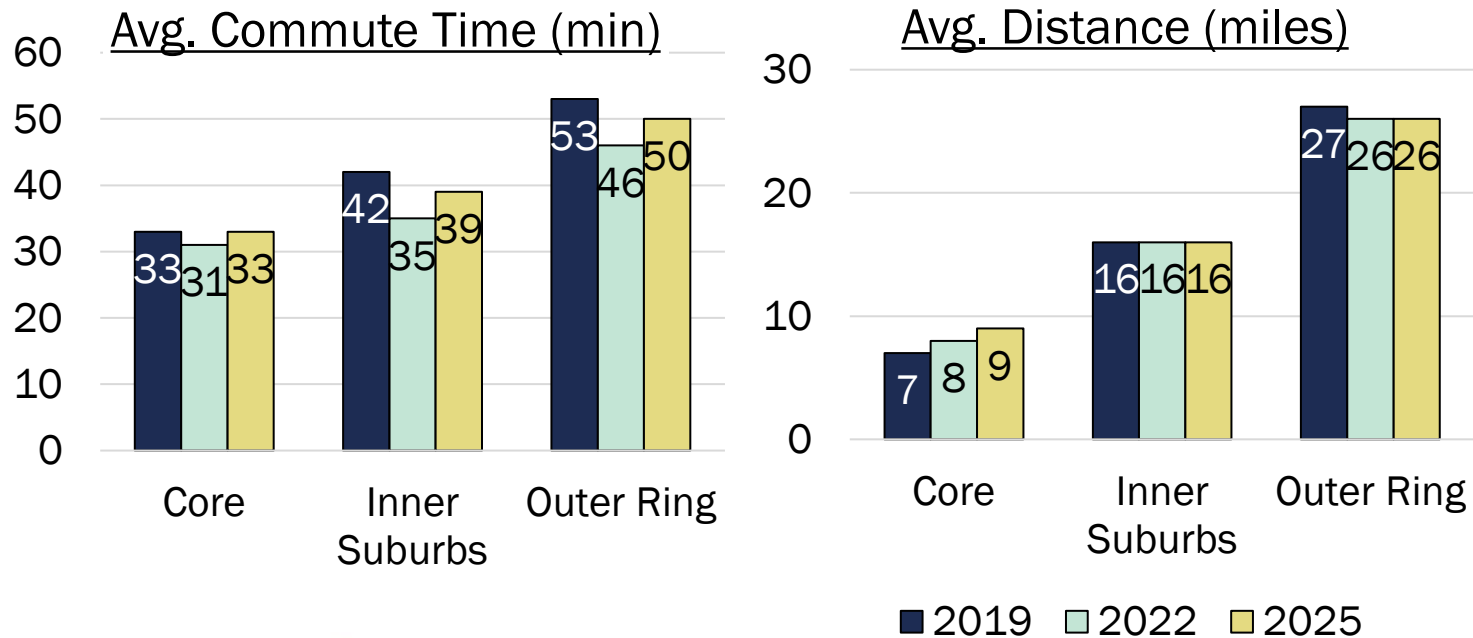
The Decision: What Commuters Care About

- Commuters are practical: They want less stress, reliable options, and efficient travel
- Top reasons commuters choose alternatives to driving: **(1) Avoiding stress; (2) Saving money; (3) Using travel time productively**
- Satisfaction trends since the pandemic: Metrorail **+16%**; Drive-alone **-7%**
 - Active commuters (bike/walk) are consistently the most satisfied



Travel Distances Remain Stable, Travel Times Rise

- Average commute distance remains ~17 miles, similar to pre-pandemic.
- Average commute time holds near 40 minutes, with transit longest (52 minutes).
- Travel times stable despite increase in telework & hybrid schedules since 2019.



Trend Influencers

Commuters haven't moved significantly farther from worksites.

Congestion and transit travel times offset distance changes.

Policy Considerations

Reducing travel time for commuters on local transit systems remains an opportunity.

Transit Access Fuels Economic Opportunity

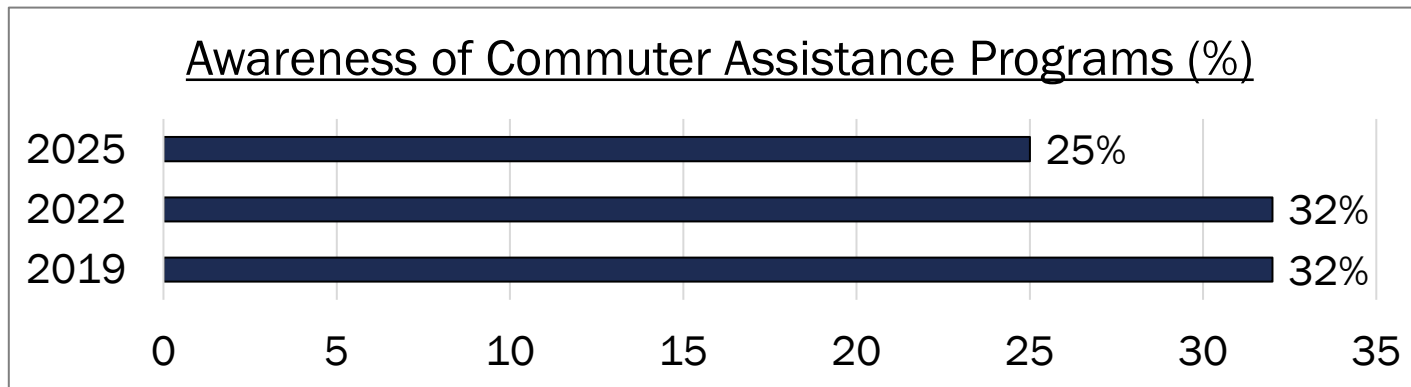
- Transit isn't just about transportation, it's access to jobs, economic mobility, and regional competitiveness
- Transit provides access to major employment clusters, supporting both individual opportunity and regional economic competitiveness¹
- Transit ridership is proven to be attractive across the income spectrum

2025 Primary Mode by Income (Excluding Telework)

Household Income	Drive-Alone	Rideshare	Transit	Bike/Walk	Policy Considerations
< \$60,000	65%	3%	28%	5%	Maintain and strengthen high-frequency, reliable transit serving major job centers. Support transit access as a workforce and economic development strategy
\$60,000 – 99,999	74%	2%	21%	4%	
\$100,000 – 139,999	67%	2%	26%	5%	
\$140,000 – 179,999	63%	2%	29%	6%	
>\$180,000	62%	5%	28%	5%	

The Awareness Gap

- Most commuters don't know their options, and right now is the best moment to reach them
- Opportunity for Commuter Connections: **45%** of workers with return-to-office policies are re-establishing their commute routines
 - This is a rare window to reach commuters as they build new habits
- Services such a free carpool Ridematching, CommuterCash incentives, vanpool subsidies, Guaranteed Ride Home, and local commuter programs can influence commute decisions



Seize the Moment

Commuters returning to the office are making decisions about how to get there. Commuter Connections saw **website traffic double** year-over-year in 2025.

Key Takeaways

- **Our transit systems are improving, and commuters are noticing**
 - Commuters value predictable, efficient, lower-stress travel and productive travel time, reinforcing transit systems' recent investments to increase ridership
- **Hybrid work is the emerging “new normal,” and we must plan for it**
 - Mid-week peaks, split-site commutes, and flexible schedules will require adaptable, modern infrastructure
- **Free help is available for commuters who want options**
 - Ridematching, transit incentives, and emergency ride homes exist, and a declining segment of commuters know about them
 - Spread the word!

Tools for COG Members & Planners

- **2025 State of the Commute Technical Report:** Full findings, charts, and tables
 - <https://www.mwcog.org/commutedata>
- **Interactive Online Dashboard:** Explore trends, filters by jurisdiction, mode, geography
 - <https://state-of-the-commute-mwcog.hub.arcgis.com/>
- **Custom Jurisdiction Data Packages:** Detailed crosstabs and geographic breakdowns delivered to planners.
 - Currently delivering to Commuter Connections network members
- **Supporting Products:** Summary handouts, slides, and annual TDM evaluation materials

Thank you!

Questions?

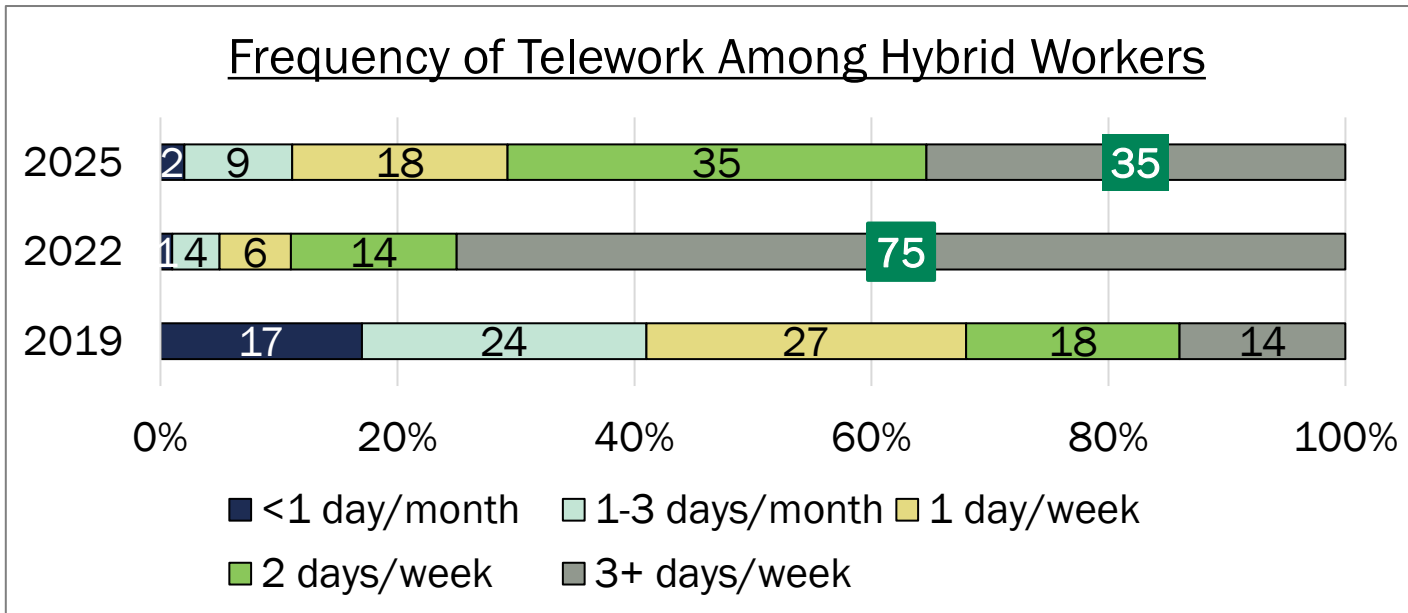
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Appendix

Hybrid Telework Frequency Doubles vs Pre-Pandemic

- Average telework days/week for hybrid workers: **1.2 (2019) → 3.4 (2022) → 2.3 (2025).**
- Frequent telework (3+ days/week) among hybrid workers dropped : **75% (2022) → 35% (2025).**
- **88%** of hybrid teleworkers still telework at least once per week.



Policy Considerations

More in-person workdays increasing mid-week roadway and transit demand.

The region will need continued transit & congestion-management investments (e.g., HOV/HOT lanes, signal timing, employer trip-reduction efforts).

Telework Rates Are Highest In The Region's Core

- Telework remains most common among **Core residents (56%)** and **Core workers (49%)**.
- Telework levels decline with distance from the Core: Middle Ring: **43%**; Outer Ring: **40%**.

	2019		2022		2025	
	n	% TW	n	% TW	n	% TW
Home Area						
Core	2,198	37%	2,563	77%	2,274	56%
Middle Ring	2,421	35%	2,531	64%	2,398	43%
Outer Ring	3,488	31%	3,045	61%	2,662	40%
Work Area						
Core	3,843	39%	3,982	76%	3,390	49%
Middle Ring	2,828	32%	2,700	60%	2,459	42%
Outer Ring	1,375	23%	930	47%	1,107	41%

Policy Considerations

Because the Core is the region's most transit-rich area, higher telework rates among Core workers may limit commute-based transit ridership recovery.

Emphasizes the importance of reliable, convenient, mid-week transit service to attract hybrid workers on the days they commute.

Federal Telework Drops Sharply

- Federal telework declined sharply: **79% (2022) → 23% (2025)**.
 - Decline is far larger than other sectors.

Employer Type	2019		2022		2025	
	n	% TW	n	% TW	n	% TW
Federal agency	2,435	48%	2,284	79%	1,847	23%
State/local government	848	14%	789	48%	844	40%
Non-profit	1,152	36%	1,269	75%	1,094	69%
Private sector employer	3,480	30%	3,514	62%	3,042	51%

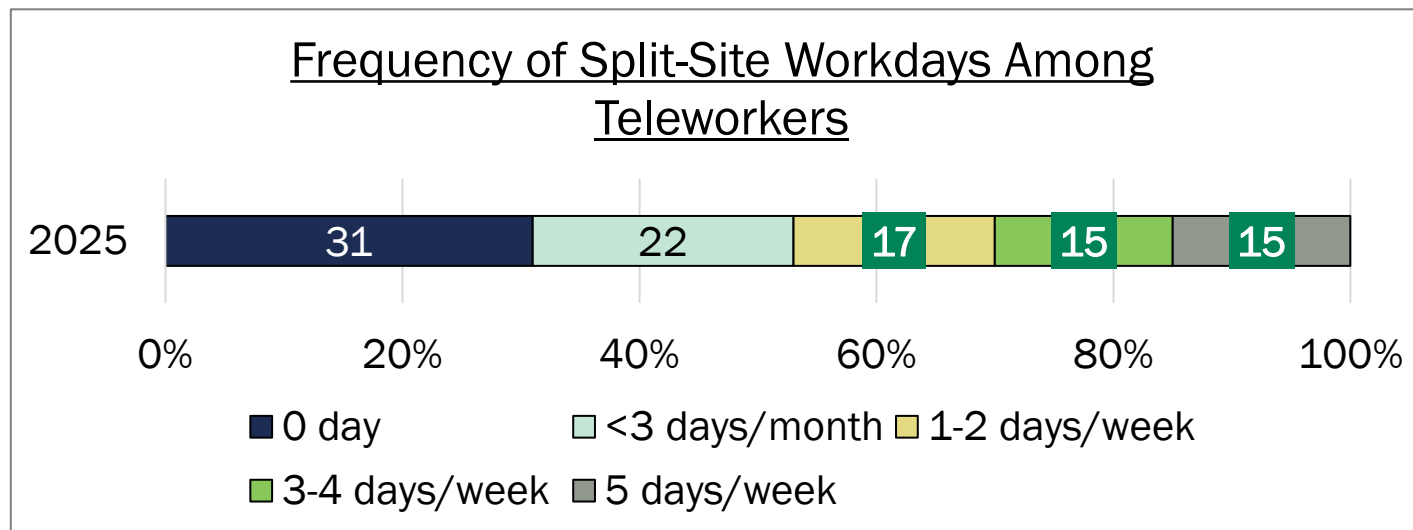
Policy Considerations

Use federal commuter benefits (e.g., transit subsidies, pretax programs) to encourage returning federal workers to choose transit over driving alone.

Coordinate with federal agencies to boost awareness and uptake of these benefits as more employees commute onsite.

RTO Policies Are Reshaping Commute Routines

- 45% of telework eligible workers reported an employer Return to Office (RTO) policy.
- Of those with RTO requirements: 60% required onsite all workdays; 18% required 3 days/week
- 47% of workers who could or do telework reported using split-site workdays at least once per week.
(Split-site = Partial in-office, partial telework)



Policy Considerations

Common occurrence of split-site teleworking may lead to greater demand for midday and off-peak travel, which could impact transit scheduling and roadway operations.

Other Recent Telework Trends

- Return-to-office
 - **45%** of those who could or do telework say their employer had implemented or announced a return-to-office policy.
 - For those with return-to-office policies, **60%** are required to be at their worksite all workdays, **11%** four days, **18%** three days, **7%** two days, **2%** one day per week.
- Split-site workdays
 - Defined as commuting to a workplace and spending part of the day there, then working from home or another remote location for the remainder of the day.
 - This has become relatively common: **47%** of workers who could or do telework have split-site workdays at least once per week. An additional **12%** do so at least once per month.

Other Recent Telework Trends

- Demographics
 - Households with annual income between \$60,000 - \$99,000 experienced the largest growth in telework from **25%** in 2019 to **42%** in 2025; a growth of **17 percentage points**.
 - Unlike the national average, men (**45%**) and women (**46%**) are nearly equally as likely to telework in 2025.
 - Age and Race/Ethnicity demographics have grown relatively proportionally in their breakdowns over the past six years.