2025 STATE OF THE COMMUTE

Key Findings and Regional Applications

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Transportation Planning Board
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Agenda Item #9

COMMUTER CONNECTIONS. A SMARTER WAY TO WORK

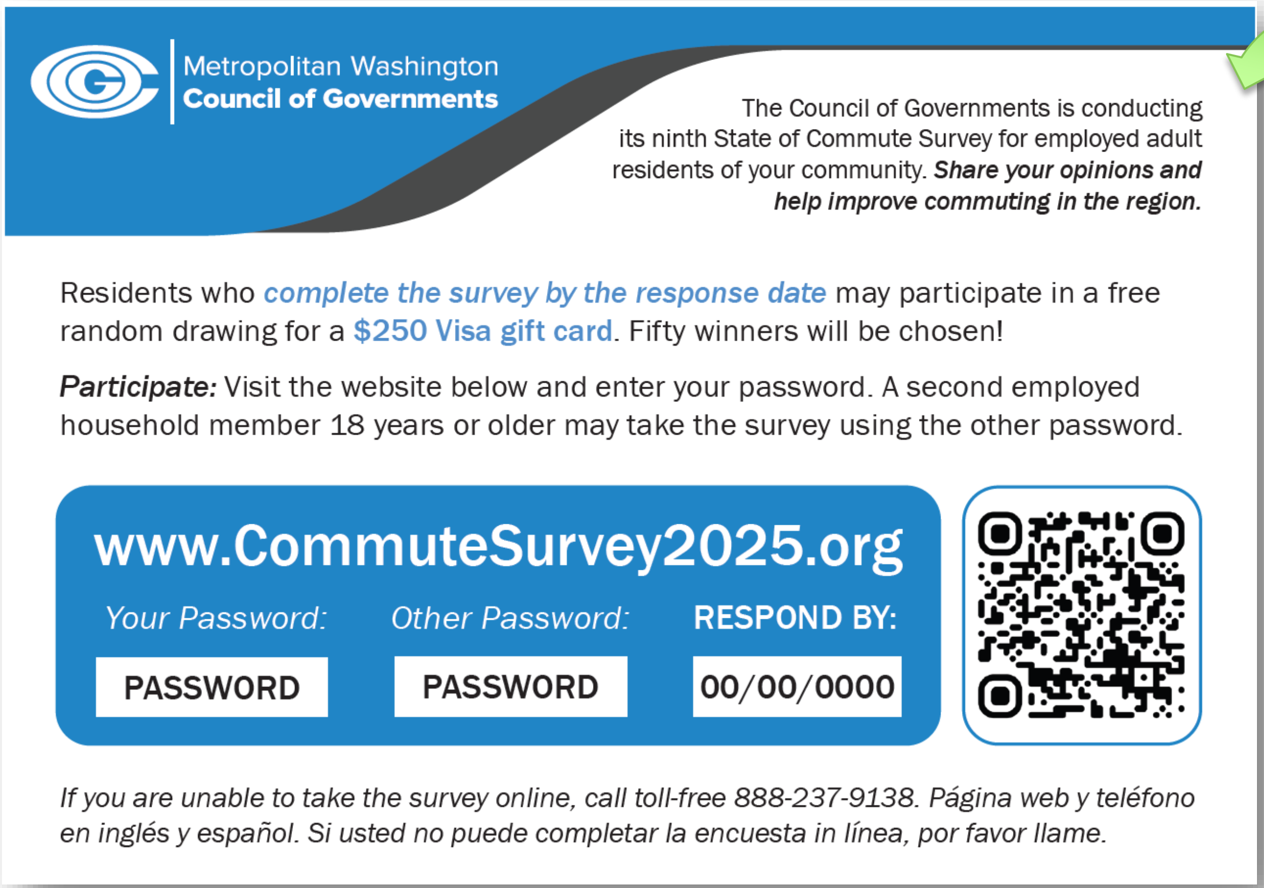
What Is The State Of The Commute?

- The SOC is the region's primary, triennial survey of commute behavior.
- Provides the first fully stabilized post-pandemic view of commuting.
- Helps TPB jurisdictions understand who is commuting to work, how, when, and why.
- Informs planning for transit reliability, roadway operations, and TDM programs.
- The 2025 survey received over **7,500 completed responses** (weighted regionwide).
- Results represent all workers across TPB planning area

Image: 2025 State of the Commute Executive Summary

How We Collected The Data

Address-based sampling (ABS) method to select a random sample of potential respondents → Mailed survey invitation to selected addresses → Online survey with option to call toll-free number to complete survey over the phone


Metropolitan Washington
Council of Governments

The Council of Governments is conducting its ninth State of Commute Survey for employed adult residents of your community. ***Share your opinions and help improve commuting in the region.***

Residents who ***complete the survey by the response date*** may participate in a free random drawing for a **$250 Visa gift card**. Fifty winners will be chosen!

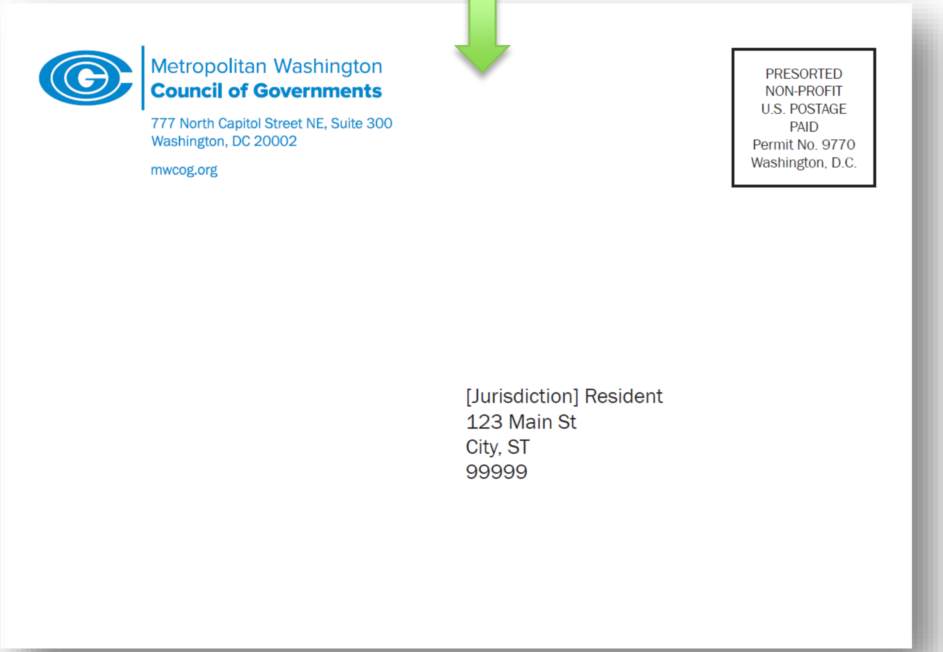
Participate: Visit the website below and enter your password. A second employed household member 18 years or older may take the survey using the other password.

www.CommuteSurvey2025.org

Your Password:	*Other Password:*	**RESPOND BY:**
PASSWORD	PASSWORD	00/00/0000

If you are unable to take the survey online, call toll-free 888-237-9138. Página web y teléfono en inglés y español. Si usted no puede completar la encuesta in línea, por favor llame.

Postcard back and front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Context: Travel Conditions

2019 (pre-pandemic) *Jan 11 - Apr 13*	**2022** (mid-pandemic) *Jan 6 – Mar 17*	**2025** (post-pandemic) *Mar 27 – Jun 26*
• Robust economic climate and low unemployment rate (3.1%) • High demand for housing as new workers migrated to the region • Lower rates of telework incidence • These factors, among others, contributed to high levels of travel on the region's transportation network	• Pandemic disruptions continue; economic conditions remain sluggish • Omicron variant of COVID-19 further delays many employers' return-to-office efforts • Telework is widespread • Transit service cuts remain prevalent • Non-commute trips recover in outer suburbs fastest, followed by the inner suburbs, then the region's core	• More return-to-office policies in place, especially for federal workers • Hybrid work more common • Shifts in peak travel: mid-week contains highest volumes, congestion • Regional travel continues to equilibrate toward a "new normal"

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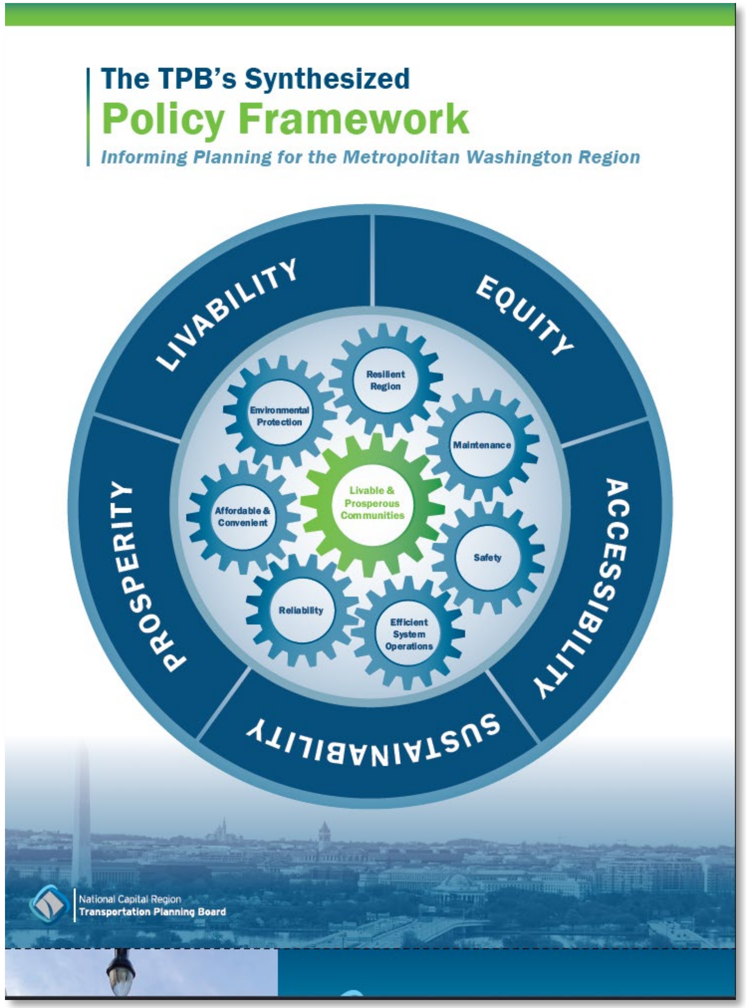
Why This Matters For TPB

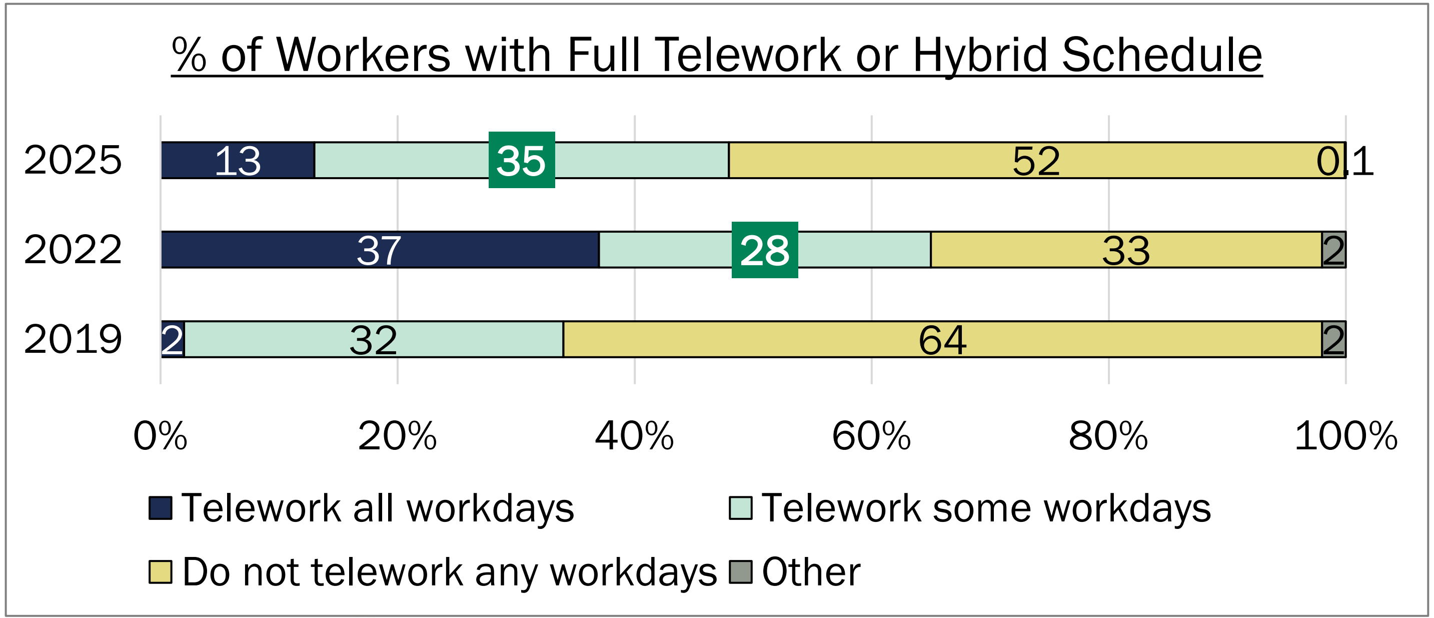
- SOC provides the region's most detailed insight into commute behavior, a key driver of peak-period congestion
- Commute travel represents less than one-quarter of all weekday trips, but disproportionately shapes roadway demand, transit loads, and operational needs.
- SOC results help TPB assess telework trends, mode shifts, and commuter motivations, informing priority areas such as congestion management and TDM strategies.
- For complete regional travel patterns, TPB pairs SOC with the **Regional Travel Survey**, which captures all travel (work and non-work) across all modes.



How Workers Commute

Telework Remains Above Pre-Pandemic Levels

- Telework incidence jumped from **34% (2019) → 65% (2022)** and has stabilized at **48% (2025).**
- Telework share of weekly commute trips dropped from the pandemic peak **(48% in 2022)** but remains **15%,** still above 2019 **(10%).**
- Hybrid work continues expanding: 28% → 35% since 2022.



Key Outcome

In 2025, regional workers eliminated an estimated **3.3 million** daily work trips by teleworking.

Policy Considerations

Telework continues to shape peak demand, congestion levels, and transit ridership.

The region should plan around persistent hybrid work travel patterns.

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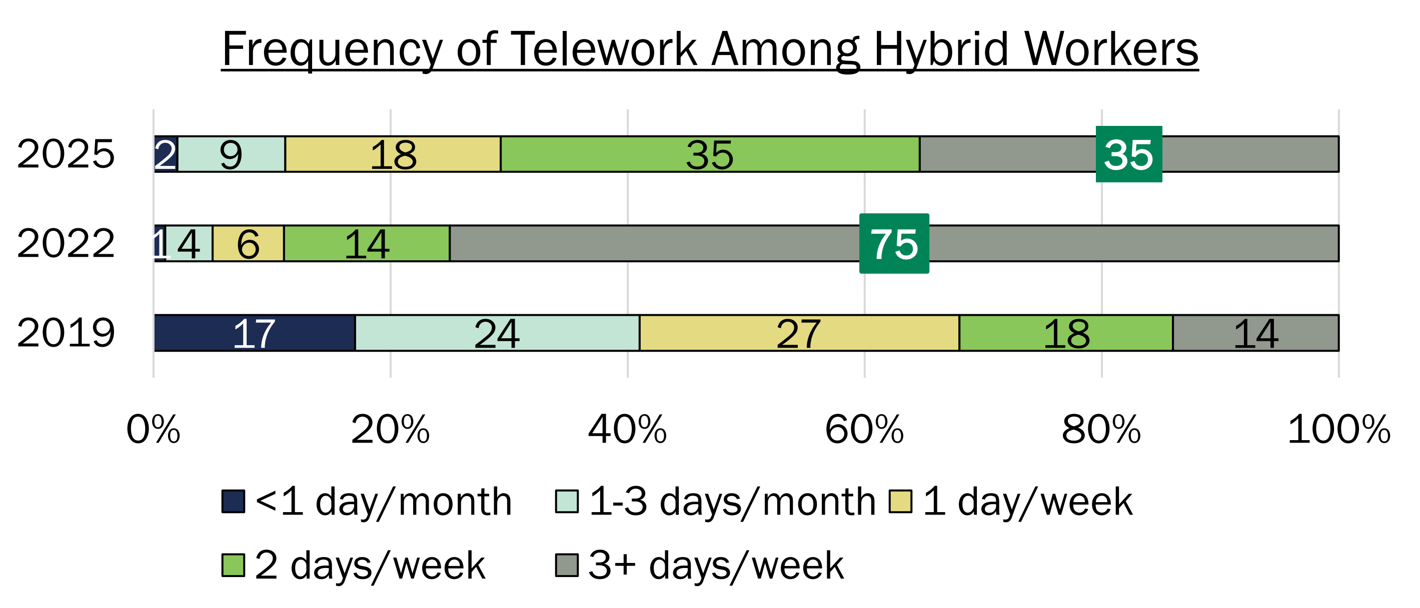
Hybrid Telework Frequency Doubles vs Pre-Pandemic

- 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).

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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.

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Federal Telework Drops Sharply

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

	2019		2022		2025	
	n	% TW	n	% TW	n	% TW
Employer Type						
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.

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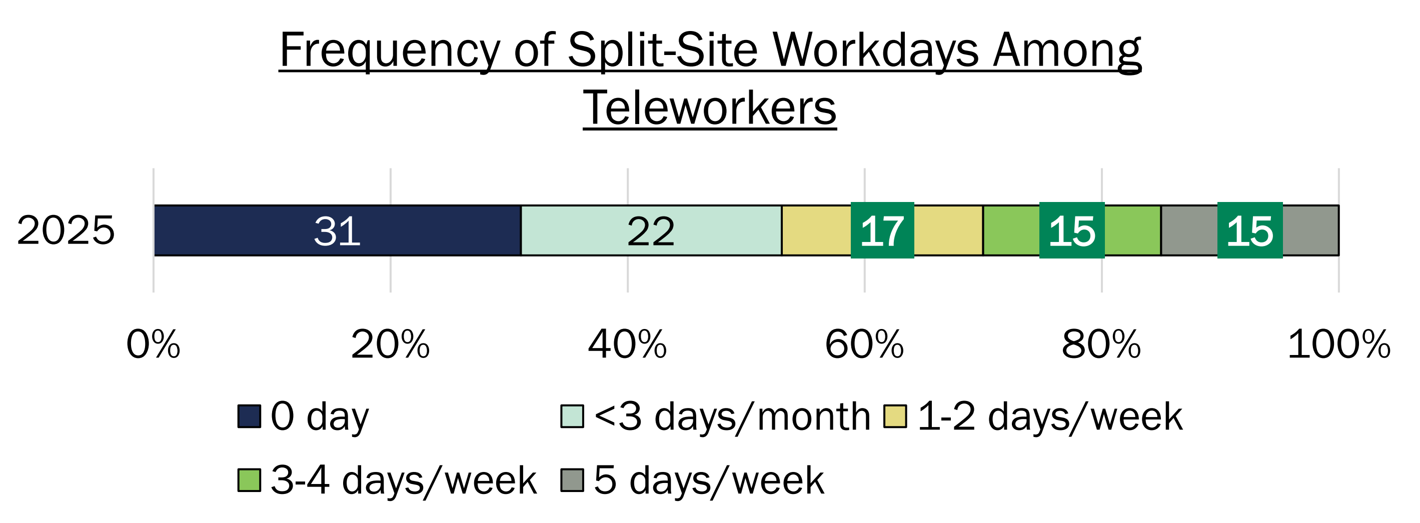
RTO Policies Are Reshaping Commute Routines

- **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.

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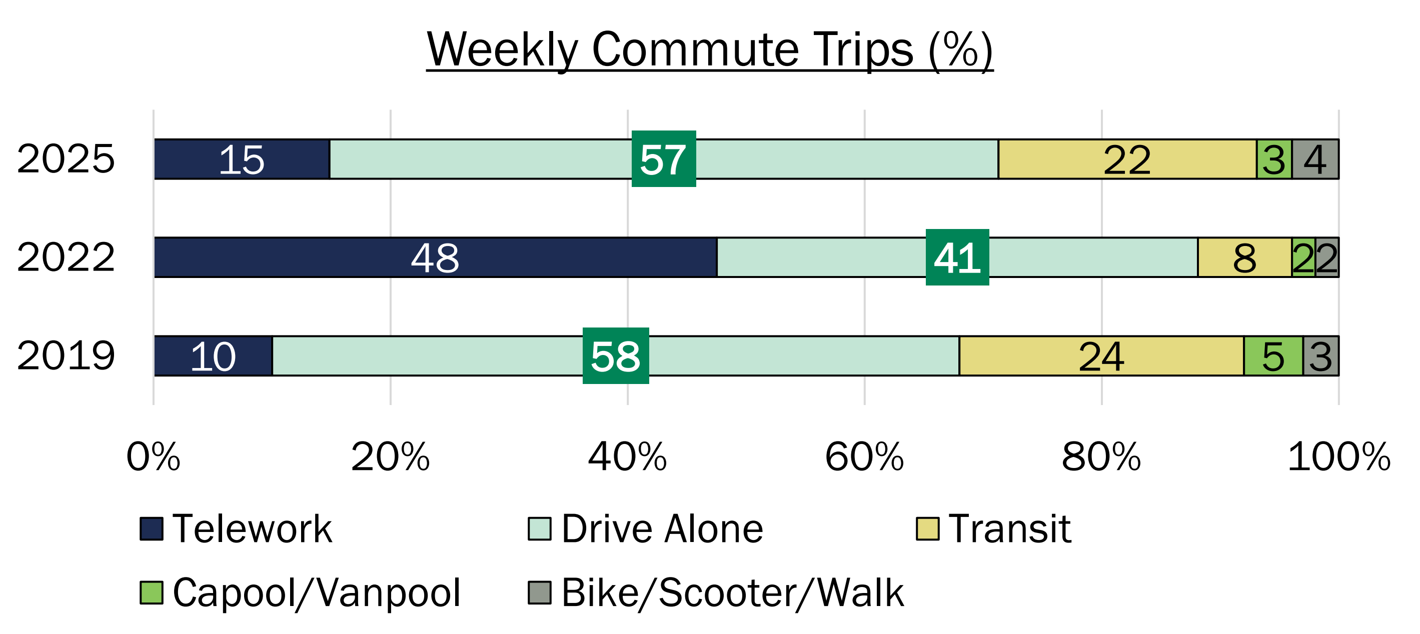
Drive-Alone Returns to Pre-Pandemic Levels

- Drive alone share: 58% (2019) → 41% (2022) → 57% (2025).
- Telework temporarily reduced driving-alone in 2022, but mode share has essentially reverted.
  - Drive-alone is once again the most common commute mode.



Policy Considerations

Further increases in drive-alone commuting will likely cause congestion to continue growing, especially on mid-week peak days.

Investment in alternatives, such as transit, HOV, TDM, remains essential.

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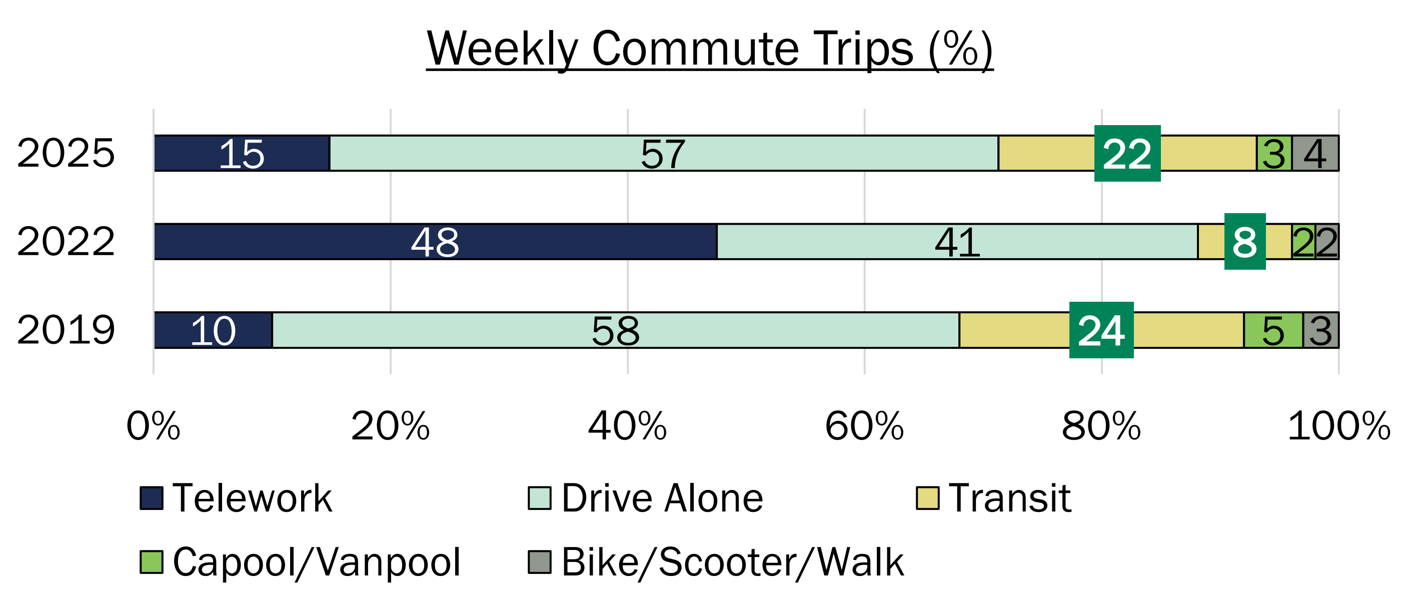
Transit Has Rebounded Sharply Since The Pandemic

- Transit mode share: 24% (2019) → 8% (2022) → 22% (2025).
- Improvements in transit reliability and service restorations contributed to this rebound.
  - Motivations for choosing transit for commutes, including reduced stress, productive travel time, and cost savings, align with these improvements.



Policy Considerations

Transit service restorations and reliability improvements matter.

Continued investment in transit frequency, accessibility, and reliability can regain riders.

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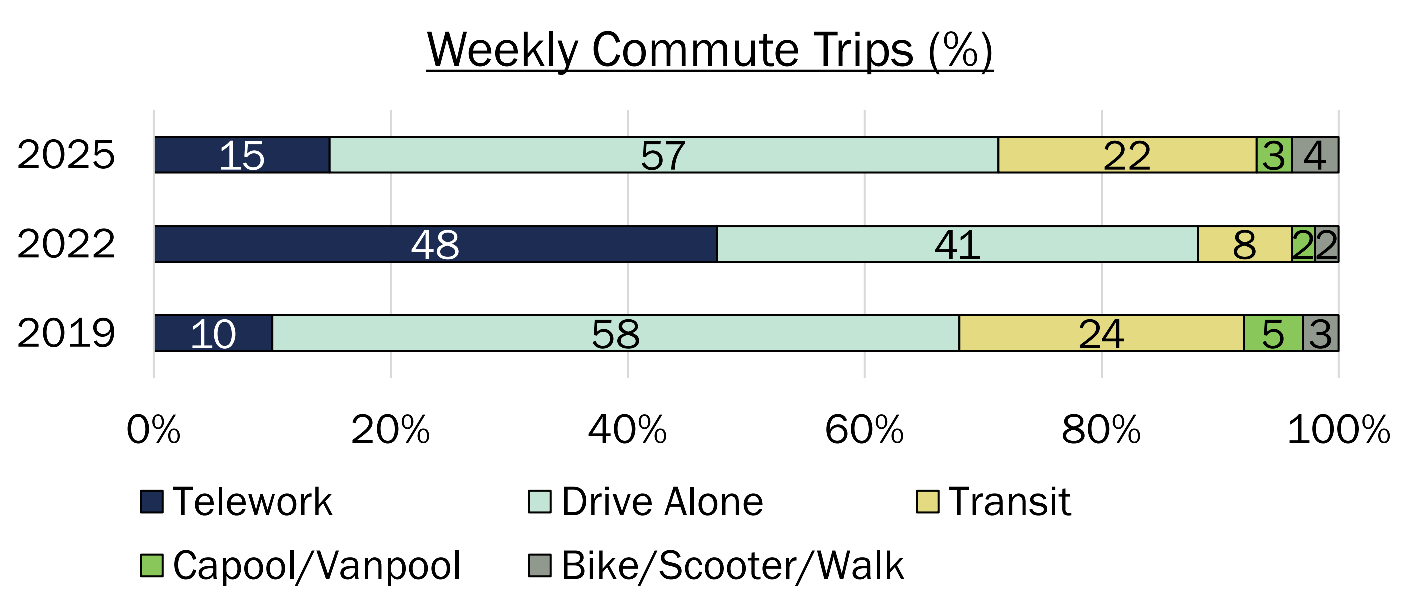
Carpool & Bike Commuting Show Modest Shifts

- Carpooling decreased from **5%** (2019) to **2%** (2022) and remains low at **3%** (2025).
  - Top barriers: commuters don't know a partner **(17%)** or have irregular schedules **(12%)**.
- Biking and walking held steady in weekly commute trips.
- Active modes remain the highest-satisfaction group (**~86%** satisfied).



Policy Considerations

Strengthen ridematching tools and outreach to address the #1 barrier: difficulty finding a partner.

Promote occasional active commuting (especially feasible for hybrid workers).

Support bike/ped travel with infrastructure and end-of-trip facilities.

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Access Connections Support Non-SOV Travel

- Walking is the most common way commuters access and depart transit stations or carpool meetup points.
- **27%** of commuters who rideshare or take transit drive alone to a central location, showing the importance of park-and-rides along highways and near transit stations.
- Only **2%** of transfers are initiated by bicycle or scooter.

Access Mode (Drive Alone) [28%]	
Drive-alone to a central location (e.g., park & ride)	27%
Drive-alone to driver's/passenger's home	1%
Access Mode (Non-Drive Alone) [72%]	
Walk	41%
Carpool Pickup & Dropoff	15%
Transit (e.g., bus/rail transfer)	14%
Bicycle or scooter	2%

Policy Considerations

Investments in multimodal transfer points (park-and-rides, bus–rail hubs, and shared mobility nodes) may increase non-drive-alone commuting.

Bike and pedestrian facilities near transit and carpool meeting points improve access for first- and last-mile travel.

Improving access infrastructure supports higher transit ridership, carpool/vanpool formation, and active commuting—especially as hybrid workers commute fewer days each week.

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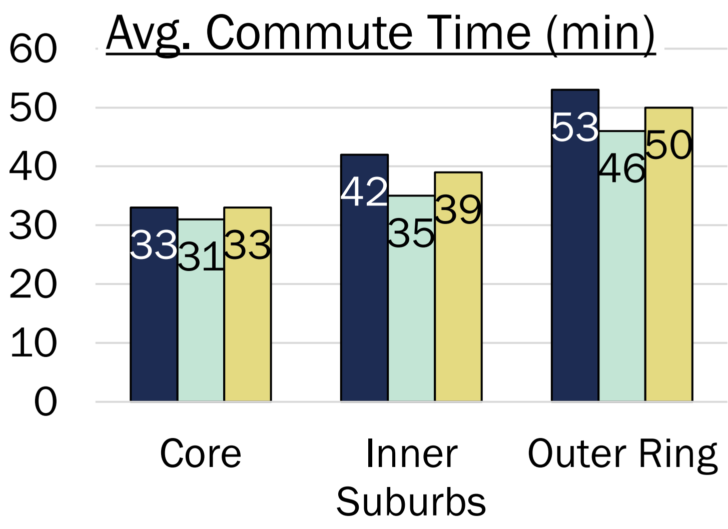
Key Takeaways: How Workers Commute

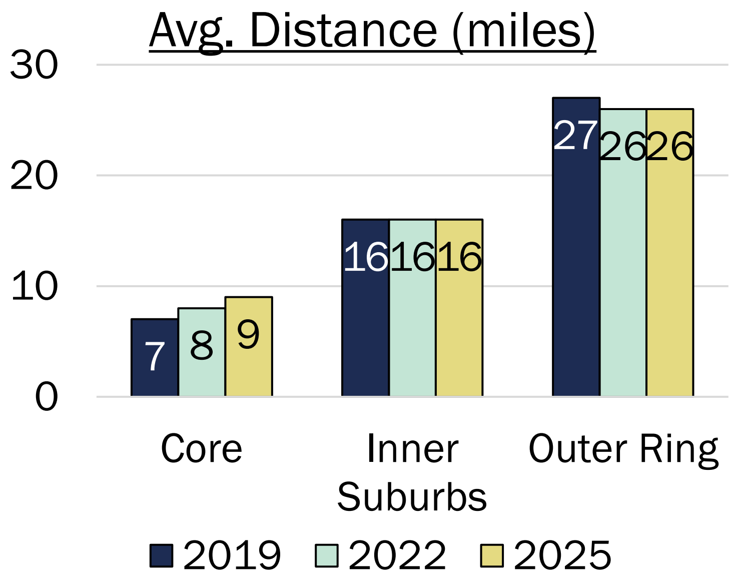
- **Telework remains elevated above 2019**, continuing to shape peak-day demand and commute variability.
  - The emerging **"new normal"** of increased telework will likely lead to sustained shifts in commute patterns post-pandemic.
- **Transit has strongly rebounded since 2022**, supported by reliability improvements and restored service.
  - Commuters value **predictable, lower-stress travel and productive time**, reinforcing transit system's recent investments to increase ridership.
- Carpooling and active modes remain **modest but stable**, with targeted opportunities for growth.
- Hybrid work opens space for **occasional non-drive-alone trips** and targeted mode-shift strategies.

Commute Information, Attitudes, and Awareness

Commute Times Hold Steady Across Years

- Average commute distance remains **~17 miles**, similar to pre-pandemic.
- Average commute time holds near **40 minutes**, with transit longest **(52 minutes).**
- Core residents have noticeably shorter commute times than Inner Suburbs and Outer Ring.
- Travel times stable despite increase in telework & hybrid schedules since 2019.





Trend Influencers

Commuters have not moved significantly farther from worksites.

Congestion and transit travel times offset distance changes.

Fewer commute days, but mid-week commute days remain high demand.

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Transit Commute Satisfaction Resurges

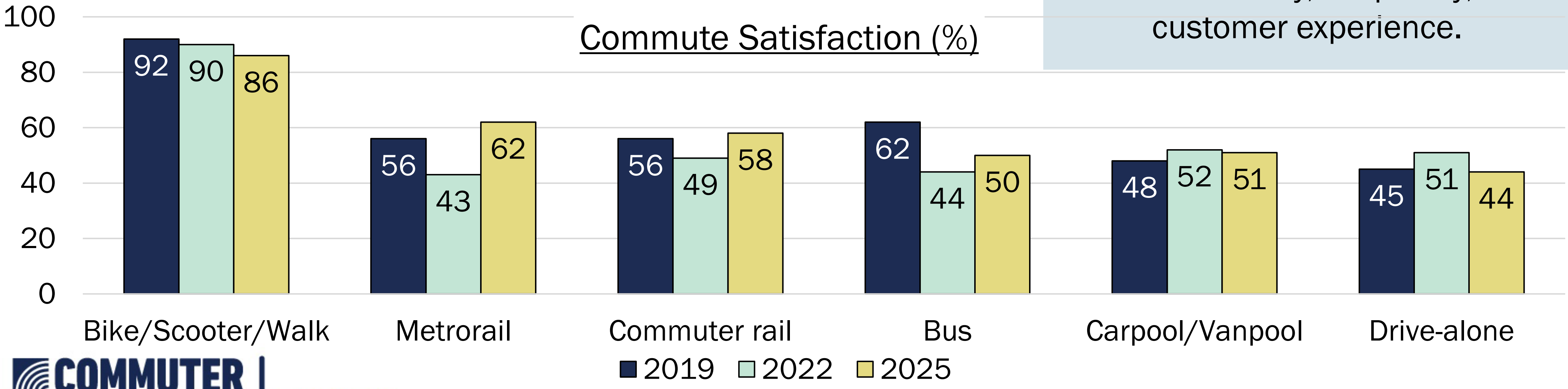
- Overall satisfaction is near **50%**, similar to pre-pandemic.
- Transit satisfaction has **increased sharply** since 2022.
  - Rail and bus commuters report notable improvements in perceived reliability and comfort.
- Since the pandemic, drive-alone satisfaction has declined at a greater rate than any other mode.

Trend Influencers

Agencies restored service and improved reliability after 2022, lifting transit satisfaction.

Policy Considerations

Continue investing in improved transit reliability, frequency, and customer experience.



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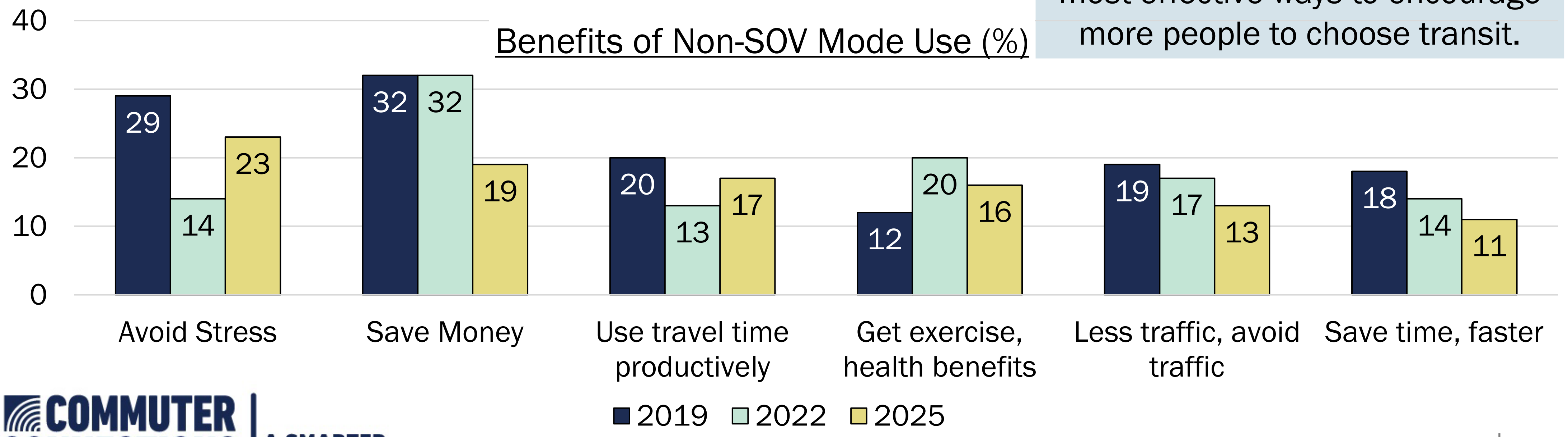
Evolving Motivators for Non-SOV Commute Trips

- **Avoiding stress** becomes top benefit in 2025.
- **Saving money** remains important but less dominant.
- Ability to **use travel time productively** supports transit use.
- Perceived benefits shifted toward reliability & comfort, not just cost.

Policy Considerations

Emphasize comfort, lower stress, and reliability in TDM marketing.

Improving frequency, reducing travel time, and strengthening on-time performance are some of the most effective ways to encourage more people to choose transit.



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Transit Access Fuels Economic Opportunity

- Transit use remains strong across income levels in the region.
- Transit provides access to major employment clusters, supporting both individual opportunity and regional economic competitiveness.[1]
- Higher-income households often live near transit, raising housing costs and limiting access for transit-dependent riders.[2]

2025 Primary Mode by Income (Excluding Telework)

Household Income	Drive-Alone	Rideshare	Transit	Bike/Walk
< $60,000	65%	3%	28%	5%
$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%

Policy Considerations
Maintain and strengthen high-frequency, reliable transit serving major job centers.
Support transit access as a workforce and economic development strategy

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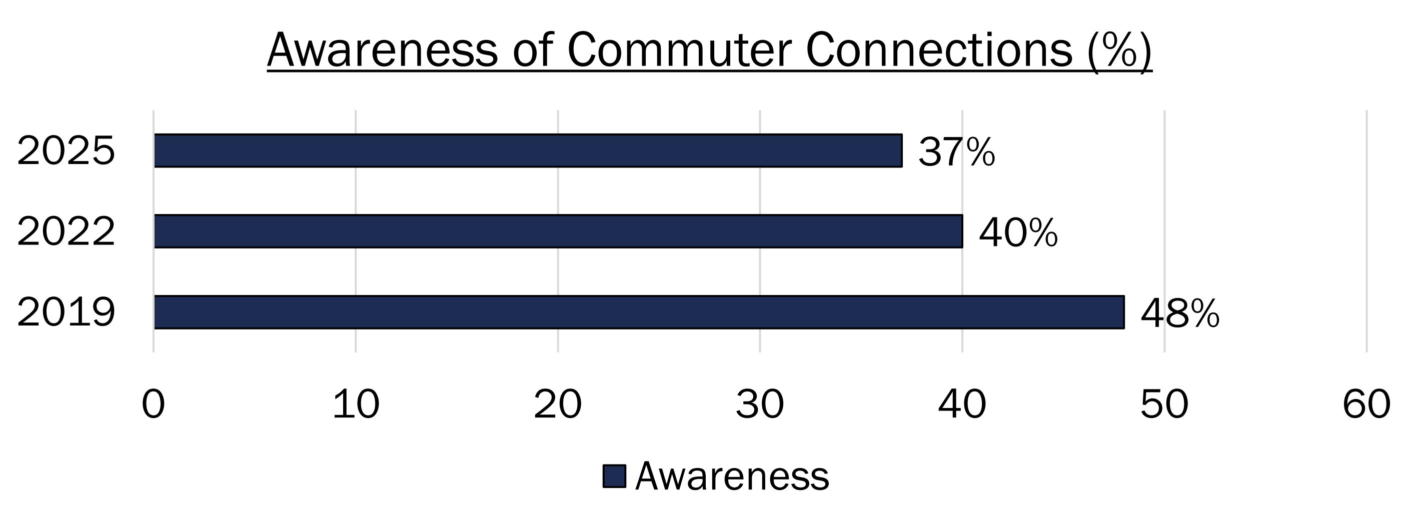
Supporting Sources
(1) *WMATA 2024 Benefits of Transit Report*
(2) *Urban Institute*

Commuters Need Re-Exposure To Their Options

- Awareness of commuter assistance programs remains low since the pandemic, which could hinder adoption of non-drive-alone modes.
- With telework decreasing from 2022 levels, many commuters are now re-evaluating their commute choices.
- This moment presents an opportunity to re-introduce commuters to improved options.



Policy Considerations

Scale Commuter Connections outreach to ensure commuters returning onsite understand their full set of commute options, including transit, carpools/vanpools, biking/walking, and GRH.

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Key Takeaways: Three Things Commuters Need Most

Reliable & Faster Trips

- Commute times have climbed back toward pre-pandemic levels, even though commute distances remain similar to 2019.
  - Commuters consistently prefer the least stressful and fastest available option.

Continued Improvements to Transit Performance

- Transit satisfaction has improved significantly since 2022 due to better reliability and restored service.
  - Reliability is directly tied to commuter motivations to choose alternative modes.

Greater Awareness of Benefits & Options

- Low awareness limits mode-shift potential and reduces adoption of non-drive-alone options.

Conclusions & Applications

SOC Findings & TPB Policy Framework

Accessibility

- Commute distances have stayed stable since 2019, suggesting travel patterns remain well-aligned with existing multimodal networks.

Sustainability

- Telework levels remain above 2019, estimated to reduce over **3 million** daily commute trips and their associated emissions.
- Improved transit reliability strengthens the region's ability to reduce drive-alone dependency.

Prosperity

- More reliable transit service aligns with employers' needs for consistent commuter access, supporting regional competitiveness.

Livability

- Commute times nearly returning to pre-pandemic levels signal the need for efficient, reliable multimodal options that improve daily life.

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Tools for TPB 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.
  - Will be delivered to Commuter Connections network members in February.
- **Supporting Products:** Summary handouts, slides, and annual TDM evaluation materials.

Thank you!

Questions?

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Appendix

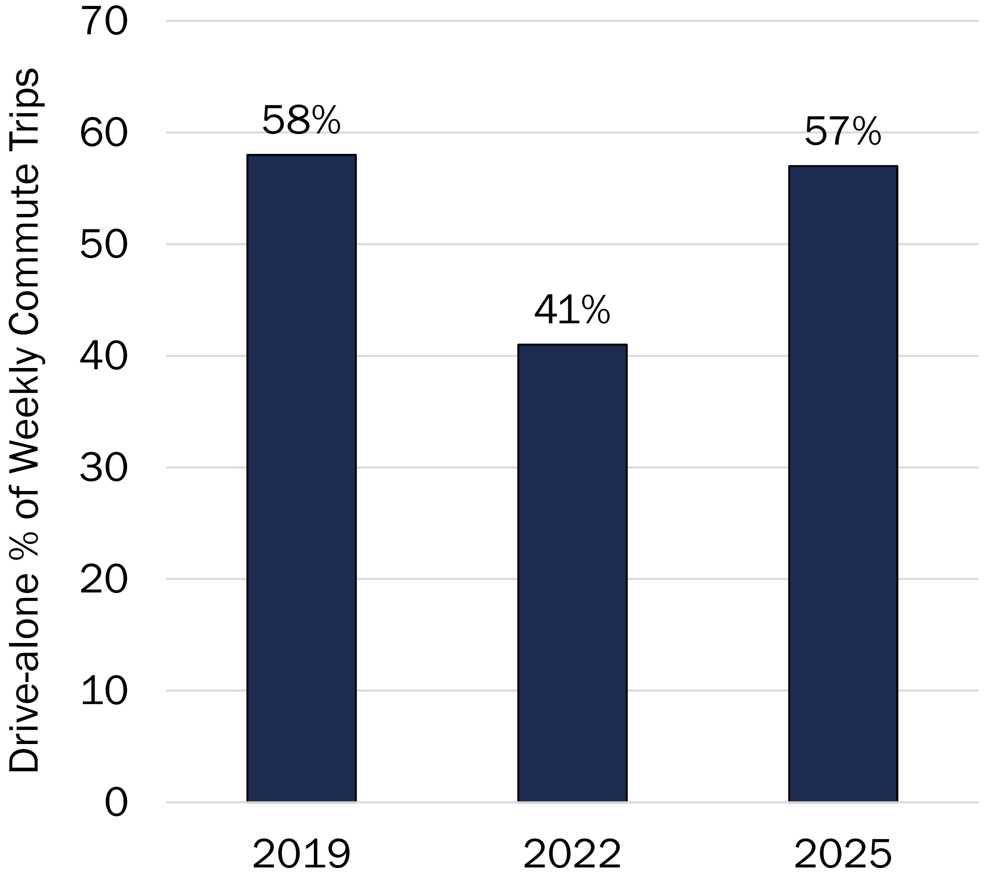
Other Recent Telework Trends

- 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.

Drive-alone Commuting Reverts to Pre-Pandemic Trends



Key Findings

Drive-alone commute trips dipped in 2022 **(41% of weekly commute trips)** when telework became the most common commute mode.

Drive-alone trips have re-claimed their position as the most common commute mode in 2025 **(57%).**

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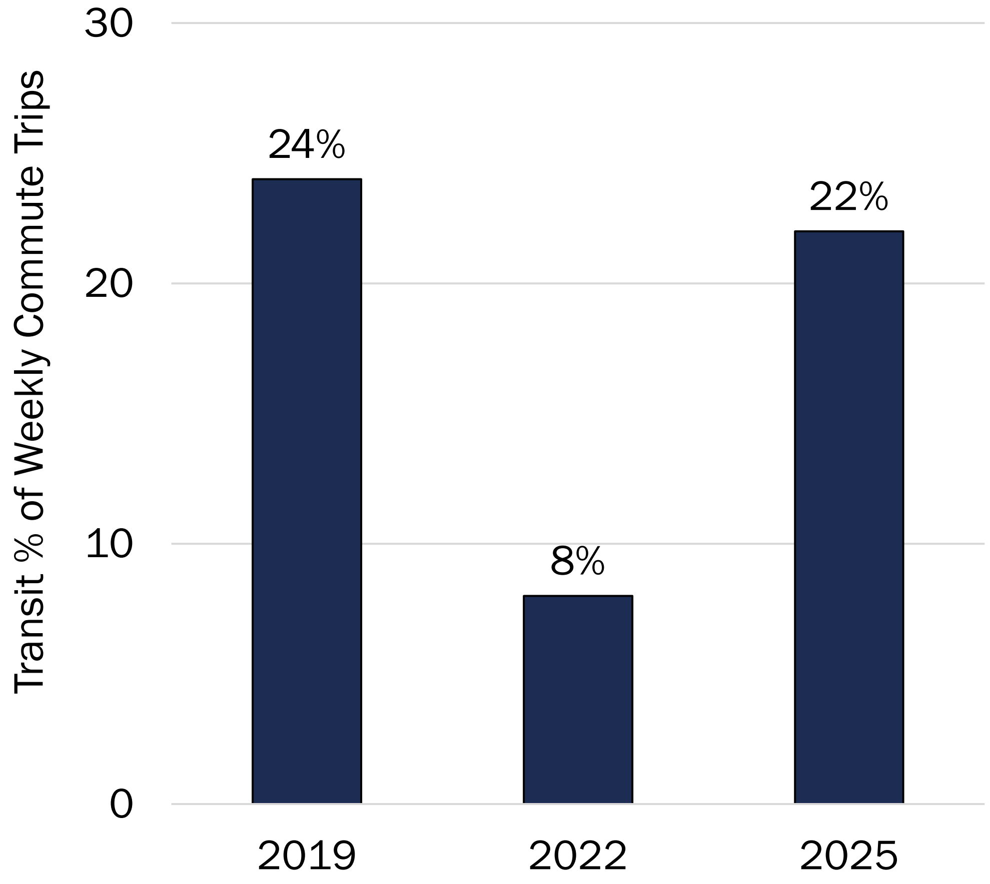
Transit Commuting Resurgence



Key Finding

Transit commuting dropped significantly in 2022, decreasing by **16 percentage points**, but has surged back **14 percentage points** to become the second-most common commute mode in 2025.

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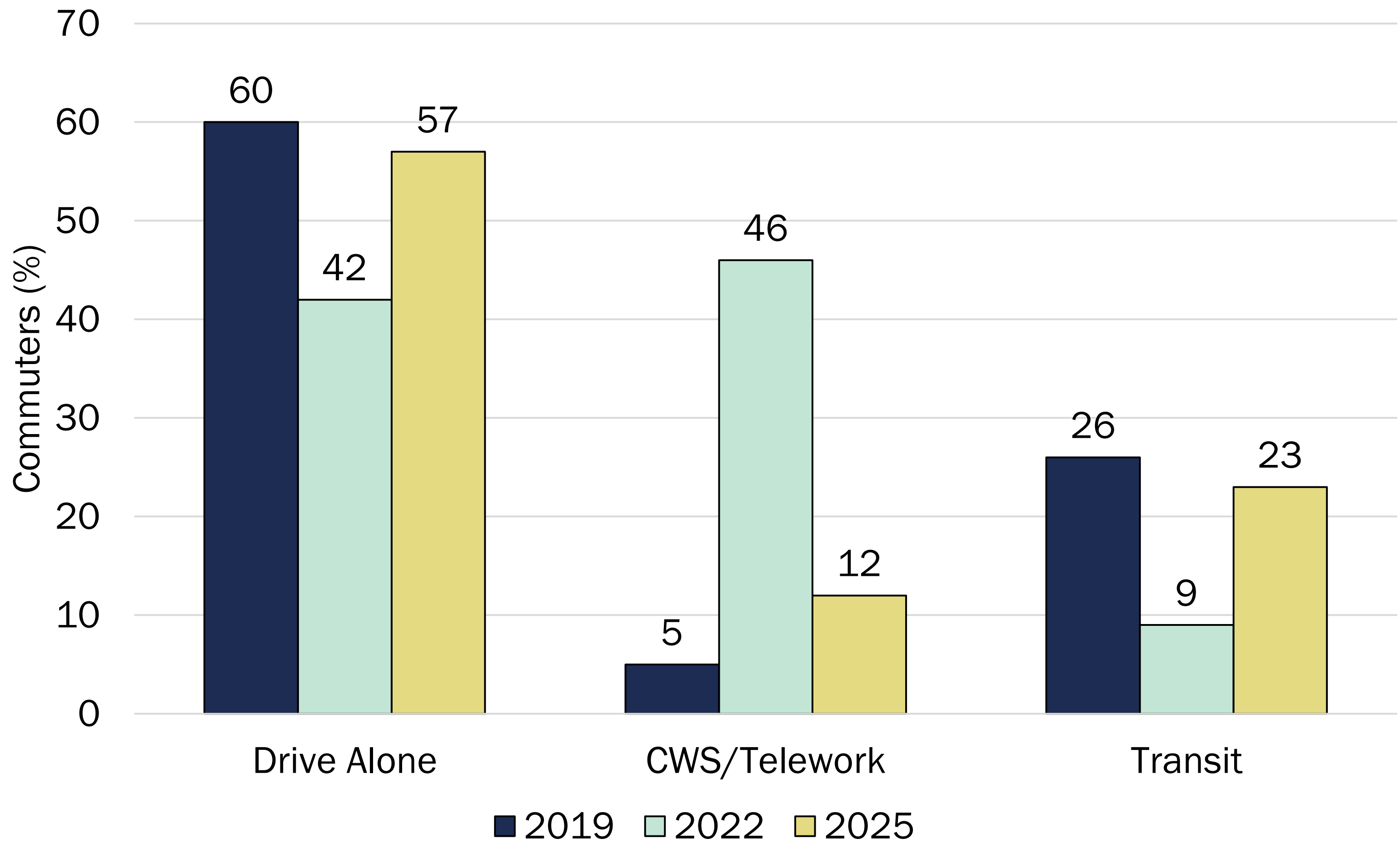
Primary Mode Comparison



- **Takeaway:** Primary commute modes have largely reverted to pre-pandemic levels, with a modest growth in telework cutting into transit and drive-alone mode share.

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