

2025 STATE OF THE COMMUTE

Key Findings and Regional Applications

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TPB Travel Forecasting Subcommittee
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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.
- Metro rail satisfaction increased by 16 percentage points from 2022 to 2025.



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



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.



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:

PASSWORD

Other Password:

PASSWORD

RESPOND BY:

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



Metropolitan Washington
Council of Governments

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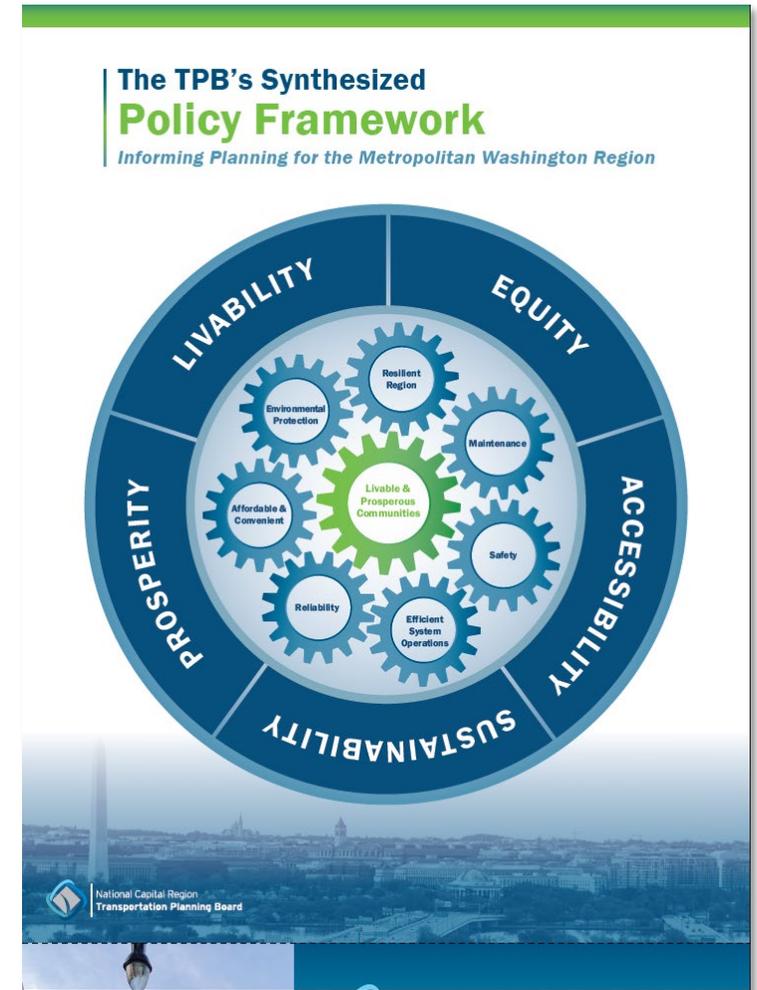
A Region in Transition

	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.

Why This Matters For TPB

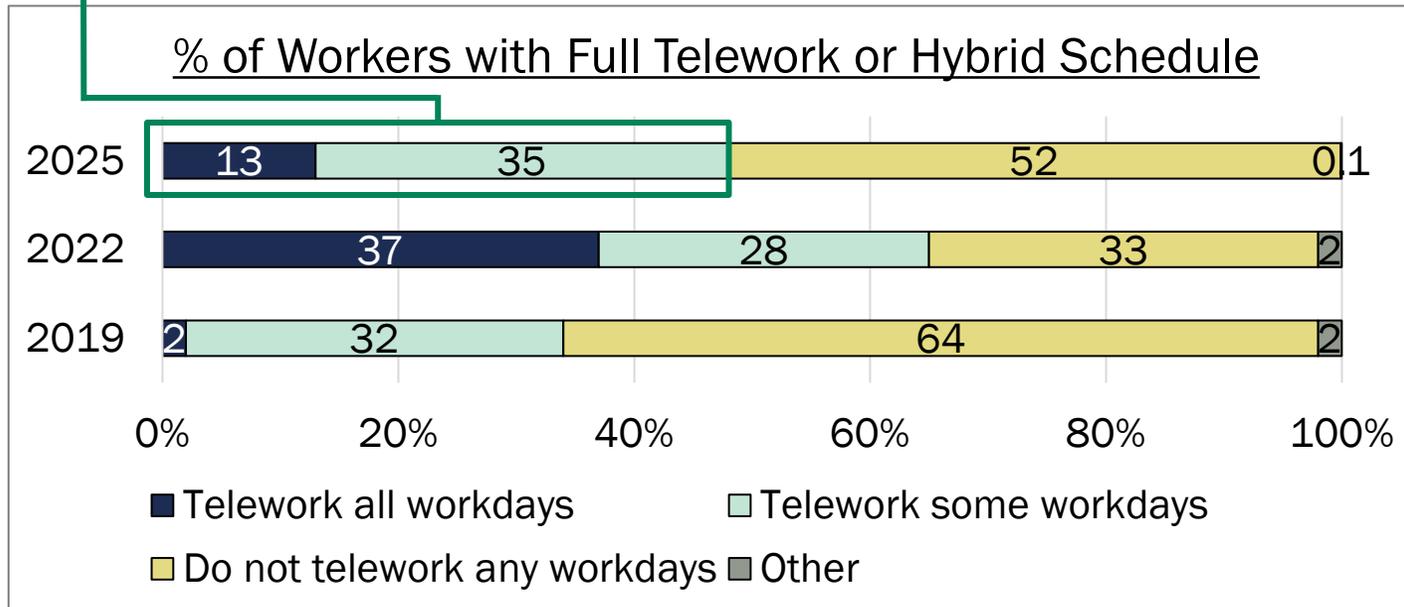
- SOC provides the region's most detailed insight into commute behavior, a key driver of peak-period congestion
- Commute travel represents less than one-quarter of all weekday trips, but disproportionately shapes roadway demand, transit loads, and operational needs.
- SOC results help TPB assess telework 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 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.

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%

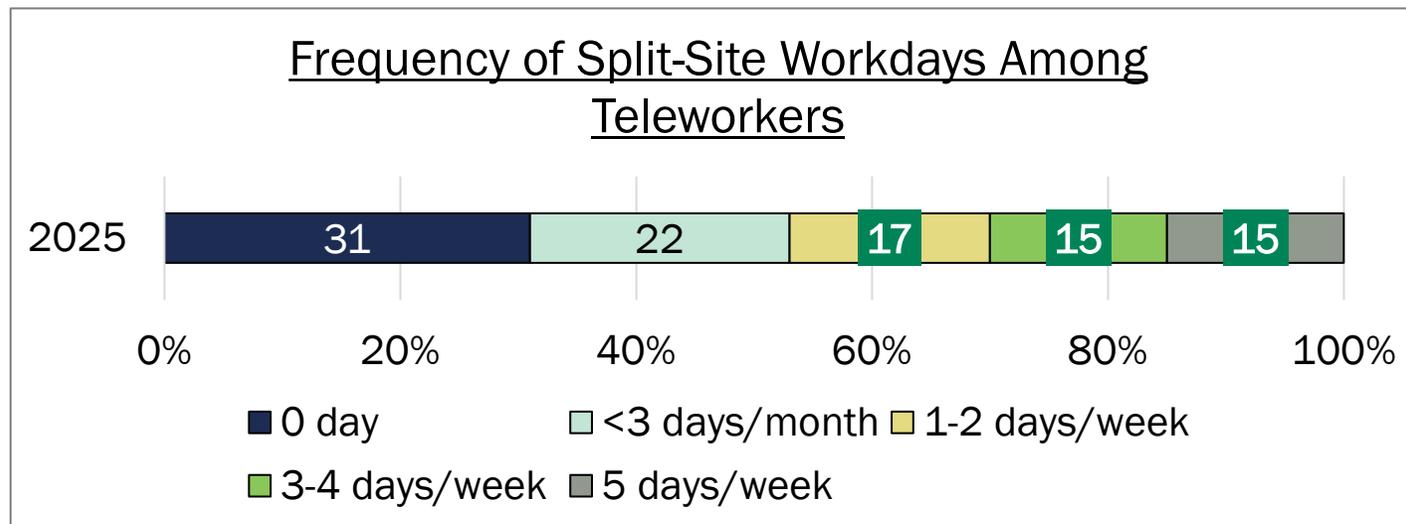
Policy Considerations

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)

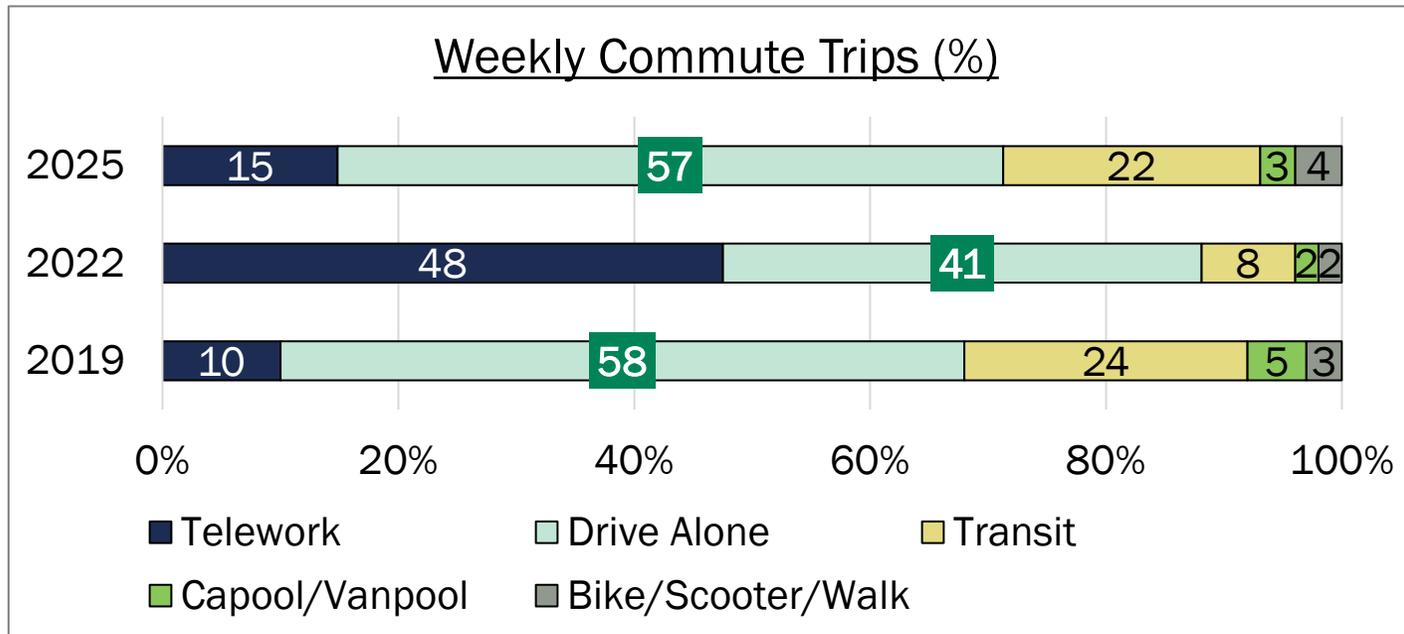


Policy Considerations

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.

Drive-Along 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.

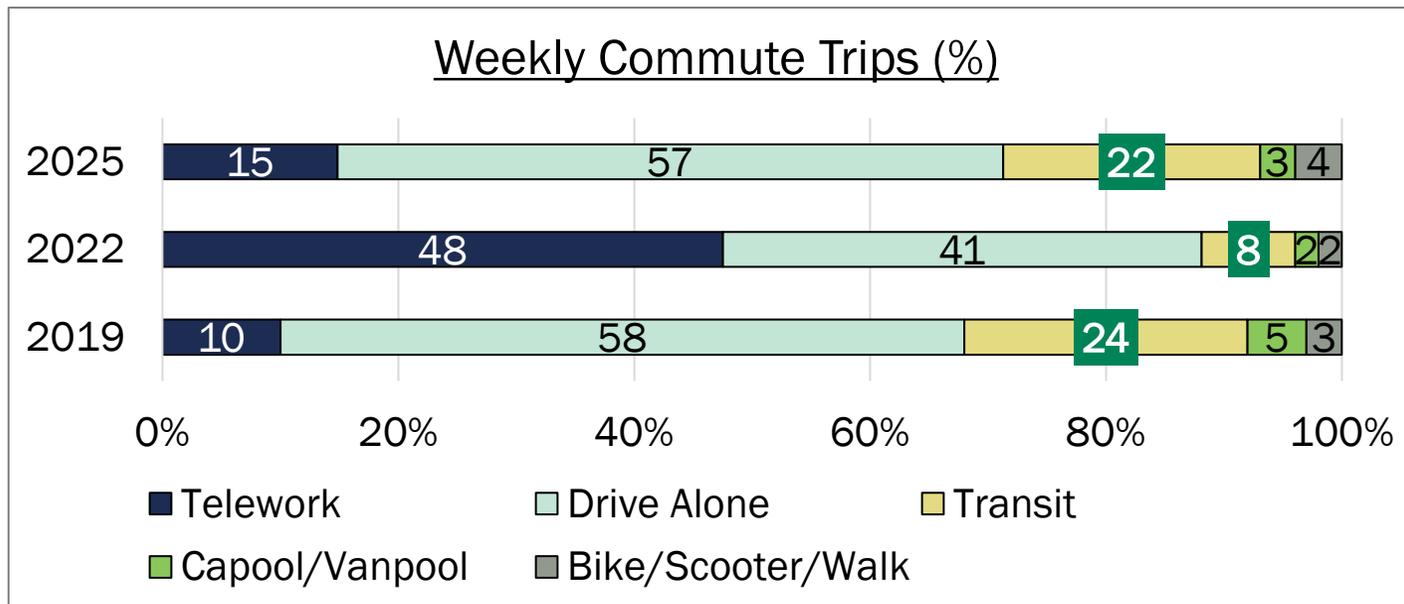


Policy Considerations

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.

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.

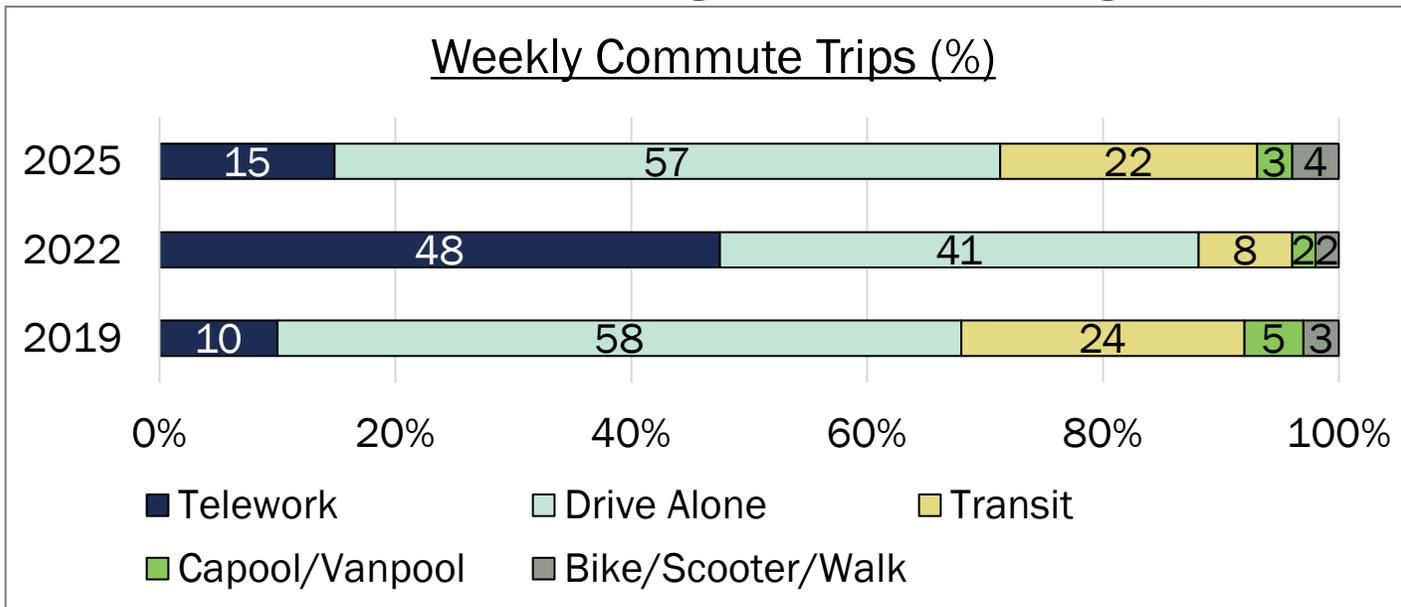


Policy Considerations

Transit service restorations and reliability improvements matter. Continued investment in transit frequency, accessibility, and reliability can regain riders.

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.

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.

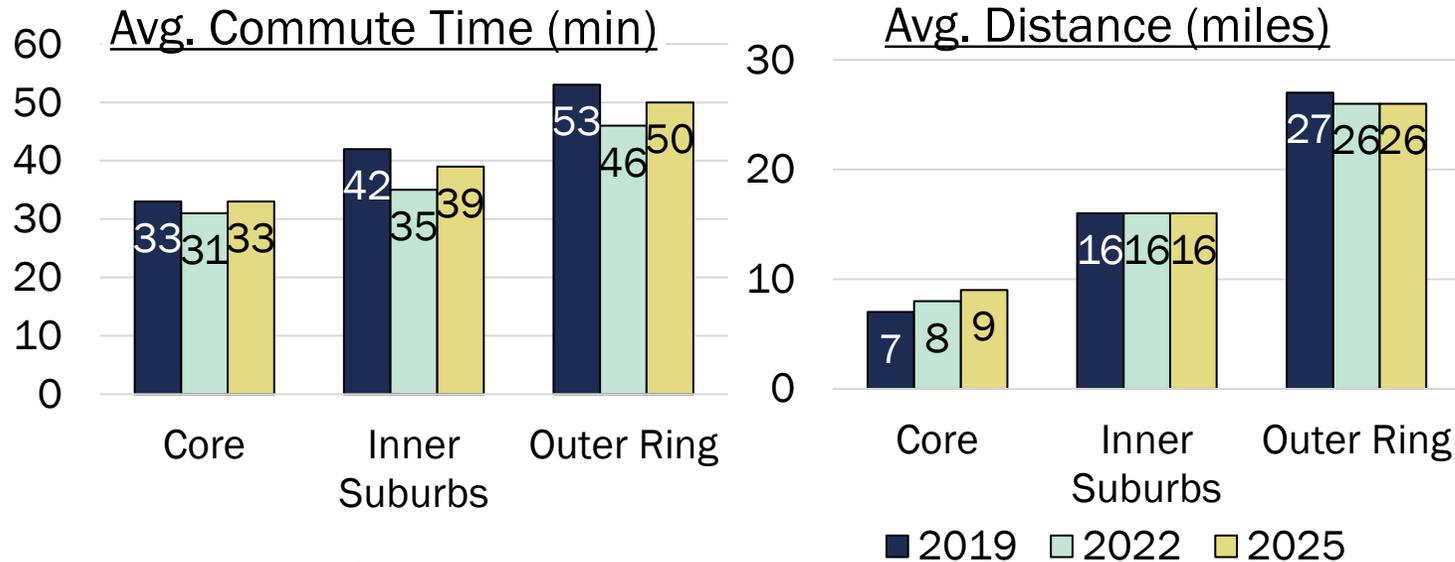
Bike and pedestrian facilities near transit and carpool meeting points improve access for first- and last-mile travel.

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

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.

Transit Commute Satisfaction Resurges

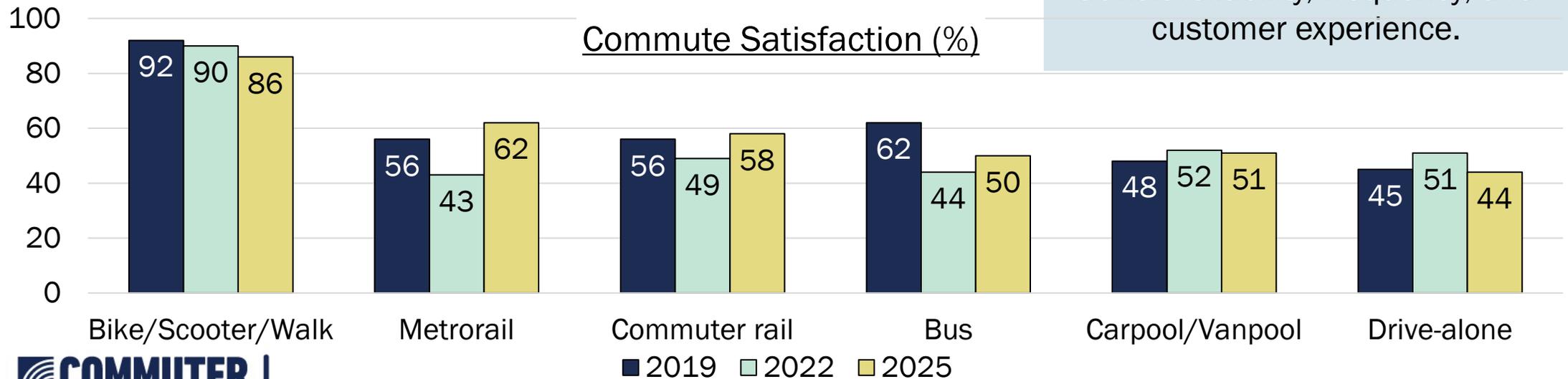
- Overall satisfaction is near **50%**, similar to pre-pandemic.
- Transit satisfaction has **increased sharply** since 2022.
 - Rail and bus commuters report notable improvements in perceived reliability and comfort.
- Since the pandemic, drive-alone satisfaction has declined at a greater rate than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



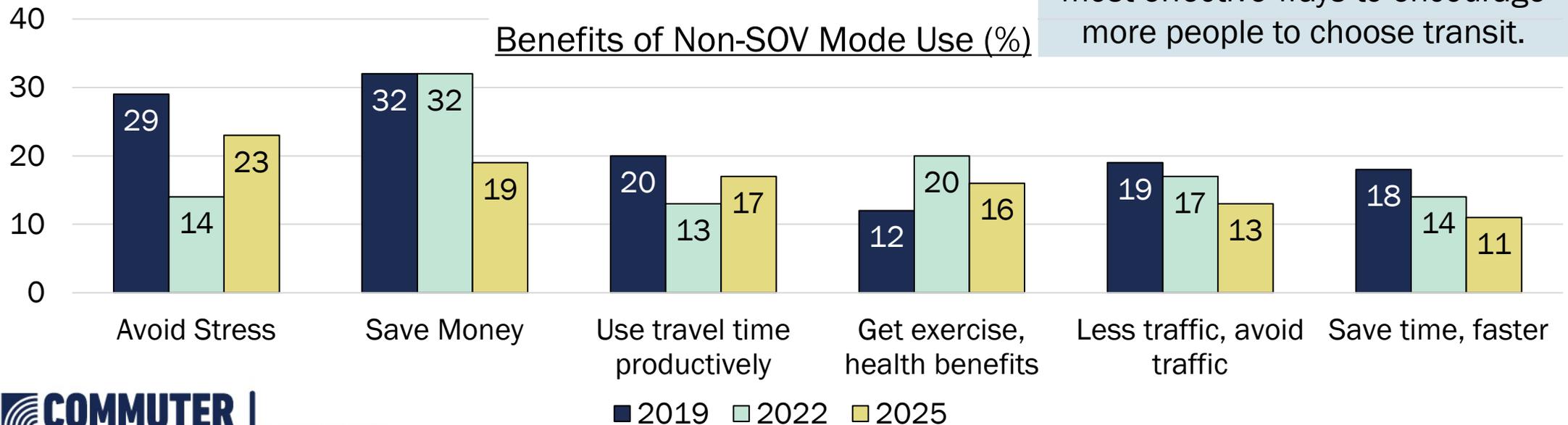
Evolving Motivators for Non-SOV Commute Trips

- **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.



Transit Access Fuels Economic Opportunity

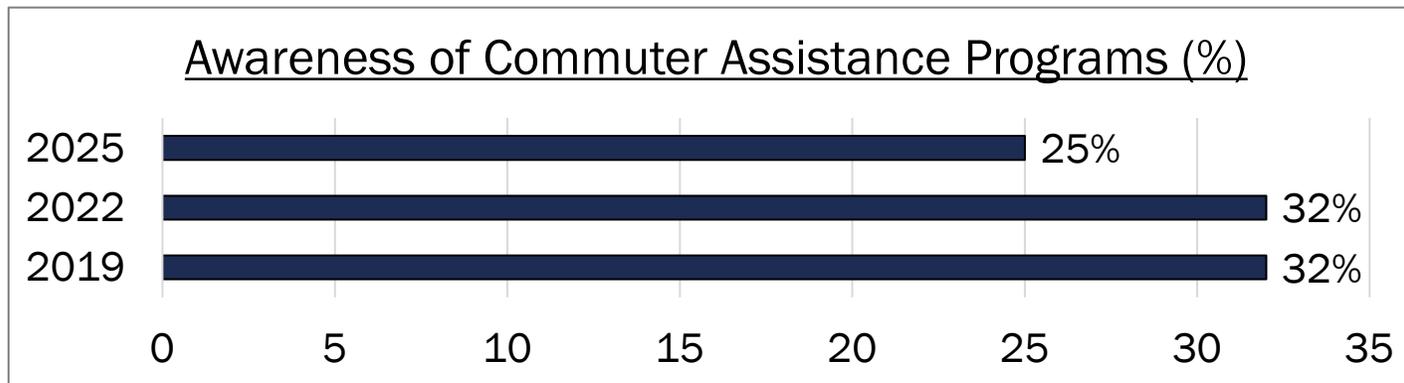
- Transit isn't just about transportation, it's access to jobs, economic mobility, and regional competitiveness.
- Transit provides access to major employment clusters, supporting both individual opportunity and regional economic competitiveness.¹
- Transit ridership is proven to be attractive across 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 as 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.

Conclusions & Applications

Key Takeaways

- **A new behavioral baseline is emerging, but its exact shape is not yet fixed.**
 - Hybrid work is a permanent structural feature of regional commute behavior.
 - Models can represent it as such, but the precise parameters remain in transition.
- **Mode choice has reverted at the aggregate level, but the dynamics have shifted.**
 - Drive-alone resilience remains strong.
 - Transit's recovery is real but incomplete.
- **Commute time stability signals broader demand recovery.**
 - Average commute times have returned to near pre-pandemic levels despite significant telework-driven trip suppression.
 - Non-commute travel has likely recovered more fully than commute data alone indicates.

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.
 - Are currently being delivered to Commuter Connections network members.
- **Supporting Products:** Summary handouts, slides, and annual TDM evaluation materials.

Thank you!

Questions?

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