

## ***Highlights of the Commuter Connections Program 2019 State of the Commute Survey Report***

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The Commuter Connections program of the Metropolitan Washington Council of Governments (COG) has released the results of their 7<sup>th</sup> State-of-the-Commute (SOC) survey, which was prepared by LDA Consulting in association with CIC Research, Inc. The SOC survey is done every three years; the next survey is scheduled for 2022.

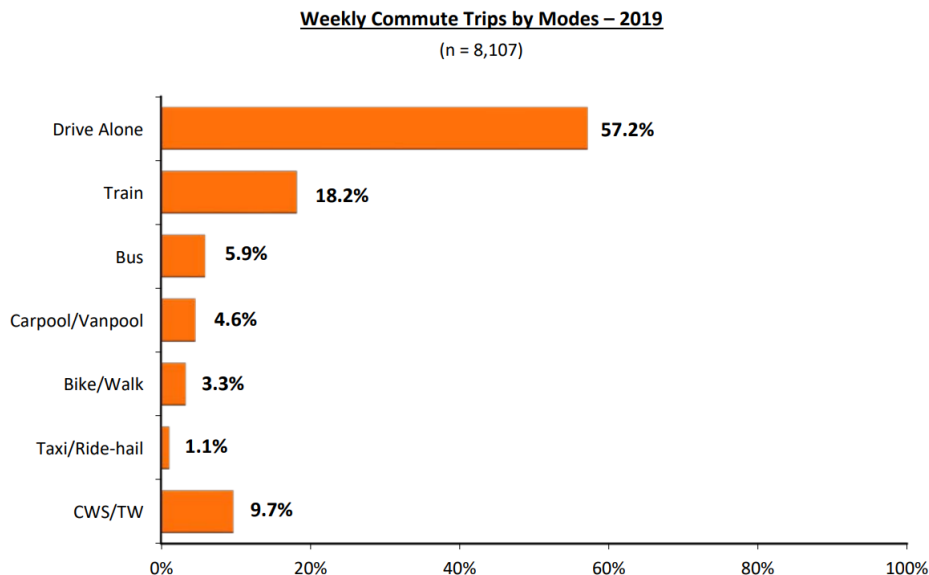
### **Why and How the SOC Survey was Conducted**

There are three reasons why COG conducts this SOC survey:

1. To document trends in regional commuting patterns and commuters' attitudes about available transportation services
2. To estimate the impacts of commute alternative programs and marketing efforts on commute travel behavior
3. To explore commuters' opinions about current transportation initiatives

The 2019 survey was conducted both online and over the phone, interviewing 8,246 employed adult residents of the Washington metropolitan area: 7,808 residents via the Internet and 438 via the telephone.

### **Discussion of Highlights from the Survey**



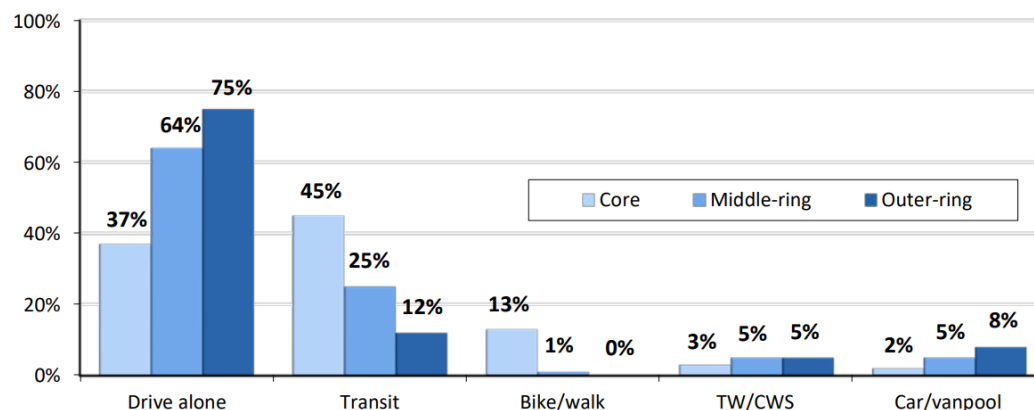
Taken from Page 8 of the SOC Survey Report

When the 3<sup>rd</sup> SOC survey was conducted in 2007, the share of commute trips made by driving alone (which includes taxi/ride-hail) was 66.9%. In the 2019 survey, that dropped to 58.3%, though it is still the largest share and the most popular commute mode in the region. Above is a bar chart of all the commute modes for the 2019 survey. This chart includes reported ride-hail use separately in order to define a baseline for this service, though it is still considered as driving alone for the purpose of vehicle use.

Transit use (which includes train and bus) rose from 17.7% in 2007 to 24.1%. About three-quarters of transit trips were by train. Train usage breaks down to 16.6% Metrorail and 1.6% MARC, VRE, and Amtrak. Carpool/vanpool use declined from 7.1% in 2007 to 4.6%. In 2019, 3.4% of carpool trips were regular and 1% of carpool trips were casual (i.e. slugs). Vanpool trips represented 0.2%. The bike/walk/scooter mode breaks down as follows: walking trips were 1.7%, biking trips were 1.5%, and scooters and e-scooters trips were 0.1%. In 2007, telework and compressed work schedules eliminated 5.7% of weekday trips, and that number has increased in each survey, despite leveling off in 2019 with statistically the same rate as in 2016. Lyft, Uber, and Via are pulling riders from all other modes. Respondents were asked how they likely would have made these commute trips if ride-hailing were not available, and they were permitted to choose more than one mode: 9% likely would have bicycled, 16% likely would have walked, 20% likely would have taken a taxi, 28% would have driven in a personal vehicle, and 59% said transit would have been a likely option.

#### Primary Mode by Home Area

(Inner Core n = 2,198, Middle Ring n = 2,421, Outer Ring n = 4,488)



Taken from Page 18 of the SOC Survey Report

Residents' home and work locations were grouped into three geographical categories:

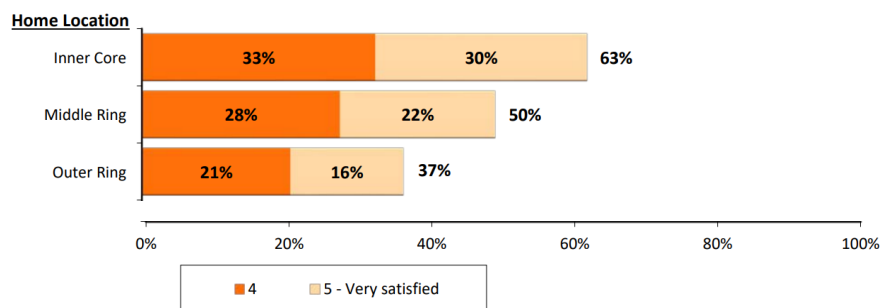
- **Inner Core:** Alexandria, Arlington, and District of Columbia
- **Middle Ring:** Fairfax, Montgomery, and Prince George's counties
- **Outer Ring:** Calvert, Charles, Frederick, Loudoun, and Prince William counties

There are differences among respondents based upon where they live. Respondents who live in the Inner Core reported higher alternative mode use, whereas commuters who live in the Outer Ring reported a 75% drive alone rate.

#### Satisfaction with Commute by Home Area

Percent Rating a Commute a 4 or 5

(Home Area – Inner Core n = 2,160, Middle Ring n = 2,360, Outer Ring n = 3,391)



Taken from Page 31 of the SOC Survey Report

In addition to higher alternative mode use, commute satisfaction is also higher depending on where the respondent lives. Of the respondents who live in the Inner Core, 63% were satisfied with their commutes, compared with Middle Ring residents (50%) and Outer Ring residents (37%).

**Percentage of Respondents with One or More Vehicles Per Adult Household Member – 2016 and 2019  
by Respondent Home Area and Age**

(Shading indicates statistically higher percentages)

Home Area and Age		1+ Car Available 2016 SOC	1+ Car Available 2019 SOC	Change (2016-2019)
Inner Core	Under 35 years (2016 n = 212, 2019 n = 778)	32%	40%	+ 8%
	35 to 54 years (2016 n = 749, 2019 n = 908)	51%	56%	+ 5%
	55 years and older (2016 n = 618, 2019 n = 476)	57%	63%	+ 6%
Middle Ring	Under 35 years (2016 n = 218, 2019 n = 417)	58%	67%	+ 9%
	35 to 54 years (2016 n = 719, 2019 n = 1,065)	69%	75%	+ 6%
	55 years and older (2016 n = 643, 2019 n = 875)	73%	76%	+ 3%
Outer Ring	Under 35 years (2016 n = 272, 2019 n = 483)	73%	83%	+ 10%
	35 to 54 years (2016 n = 1,285, 2019 n = 1,746)	81%	87%	+ 6%
	55 years and older (2016 n = 907, 2019 n = 1,163)	81%	88%	+ 7%

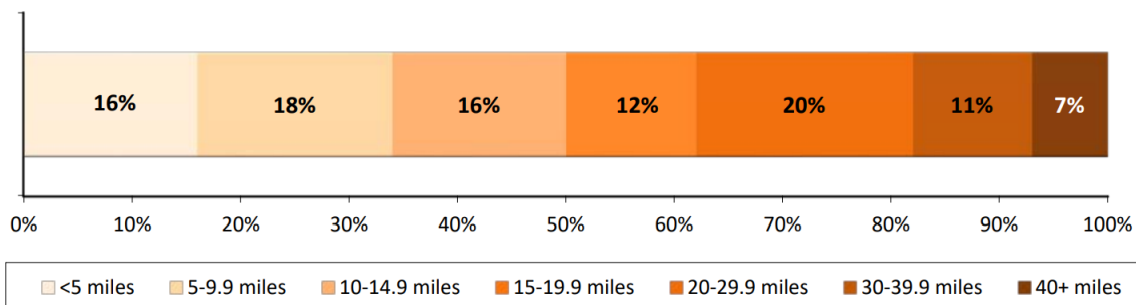
Taken from Page 130 of the SOC Survey Report

Given the findings regarding commute satisfaction, it might be expected that respondents, especially those younger than 35, who live in the Inner Core might be abandoning their vehicles. However, it is not true. For example, younger respondents who live in the Inner Core reported an increase in those who had 1+ car available from 32% in 2016 to 40% in 2019.

Similar to those who live in the Inner Core, those who work there also reported higher alternative mode use versus an 87% drive-alone rate for commuters who work outside the regional core. In addition, 76% of Inner Core employees reported access to services and benefits, compared with 51% who work in the Middle Ring and 28% who work in the Outer Ring. Speaking of services and benefits, SmarTrip or other subsidies for transit/vanpool were available to 45% of respondents, information on commuter transportation options was available to 26% of respondents, services offered by employers for bikers and walkers were available to 22% of respondents, and preferential parking offered by employers for carpools and vanpools was available to 17% of respondents. Predictably, respondents who work for large firms reported greater access to these benefits/services than did respondents who worked for small firms, and respondents who work for Federal agencies were most likely to have benefits/services available, compared with respondents who work for other types of employers.

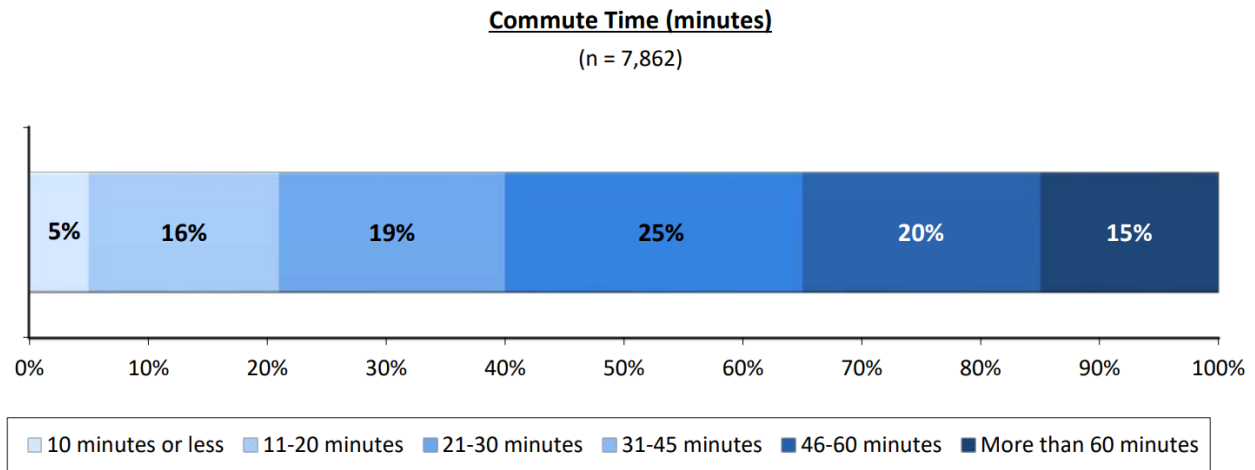
#### **Commute Distance (miles)**

(n = 7,412)



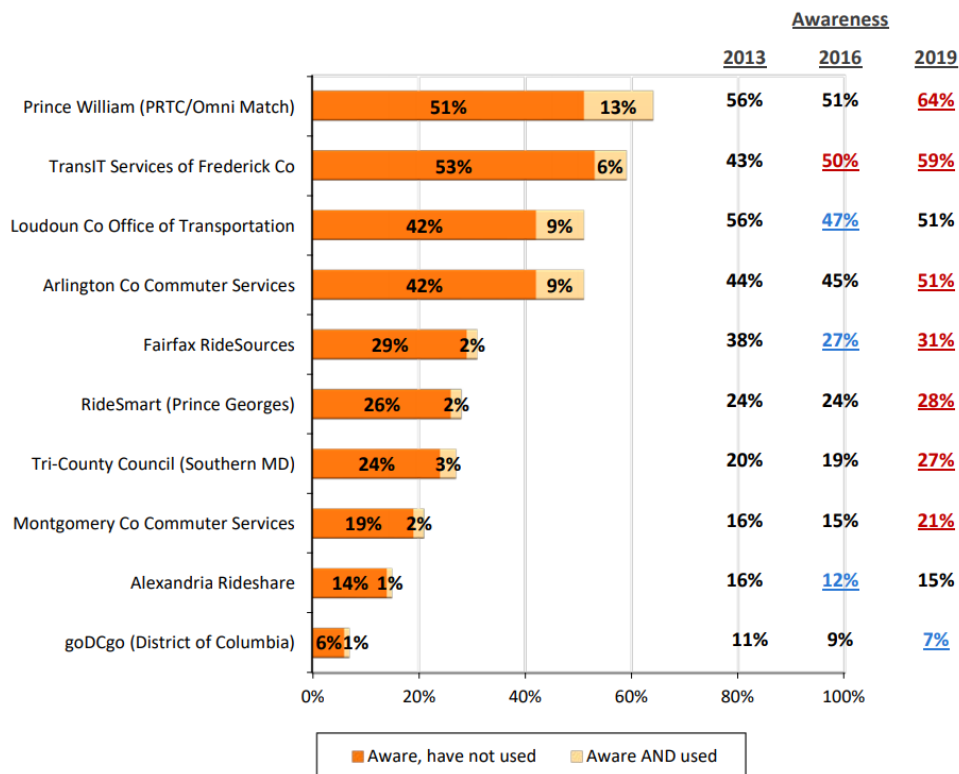
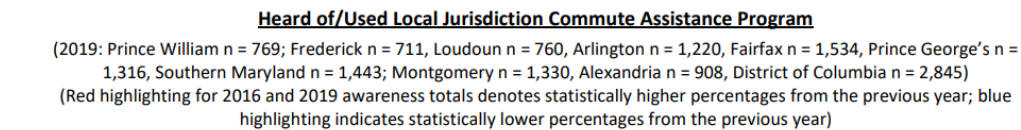
Taken from Page 21 of the SOC Survey Report

The average commute distance measured back in the 2016 survey was 17.3 miles, and the 2019 average was about the same, coming in at 17.1 miles.



Taken from Page 21 of the SOC Survey Report

The average 2019 commute time was 43 minutes. However, even though the average commute distance remained the about the same from 2016 to 2019, the average commute time is increasing: the time measured in 2013 was 36 minutes, and the time measured in 2016 was 39 minutes.



Taken from Page 98 of the SOC Survey Report

One last highlight to note: out of respondents who live or work in Prince William, 64% reported awareness of PRTC/OmniRide Ridesharing Service. The SOC survey points out that name changes,

rebranding, and joint branding with Commuter Connections can lessen awareness of name recognition and use of local jurisdiction commuter assistance programs. In spite of these facts, among the seven local jurisdiction commuter assistance programs which recorded higher awareness in 2019 than in 2016, PRTC/OmniRide Ridesharing Service had the highest increase in the region at 13 percentage points.

Next, after asking about awareness of local jurisdiction commuter assistance programs, all respondents who reported that they knew of a local organization were then asked if they had contacted it. Responses ranged from 1% of respondents who had contacted the organization to 13%. PRTC/OmniRide Ridesharing Service was again at the top of the list with 13% of respondents who were aware of our organization and had been in contact. This news is excellent because, as the SOC survey explains, commuters traveling from Prince William, a jurisdiction in the Outer Ring, are likely to experience more traffic and/or have longer commute times and distances than residents in the Middle Ring or Inner Core.

## **Conclusion**

It is important for the residents of Prince William County, Manassas, and Manassas Park that they are provided with options for commuting with the goal of taking more cars off the road. The drop in the regional drive-alone rate indicates that these efforts have been fruitful. In addition, the high recognition of PRTC/OmniRide Ridesharing suggests that our residents are using our bus service, using our Ridesharing service, seeing our buses on the road, and/or seeing our staff out and about at events. The results of the survey show that our efforts are making a difference, however, the low commute satisfaction for residents of the Outer Ring underlines the necessity of buy-in from all stakeholders to increase availability of teleworking; transit access; sidewalks and bike lanes for biking and walking; and rideshare assistance for matching carpoolers and vanpoolers. Only when commuters, employers, policy makers, and OmniRide staff all work together can we continue to achieve good results in our region.