



2013

STATE OF THE COMMUTE

"At-a-Glance" Survey Section

FROM THE METROPOLITAN WASHINGTON DC REGION

Attitudes Towards Transportation Options

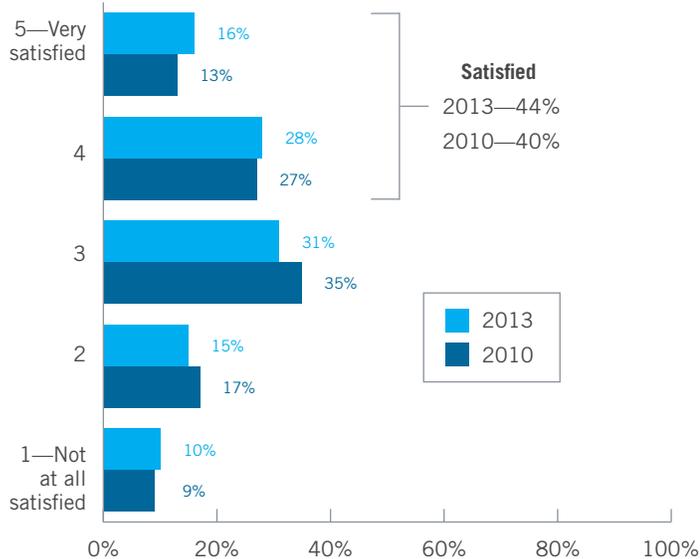


This is a “At-a-Glance” section from the 2013 State of the Commute (SOC) Report showing key figures and tables on regional attitudes towards transportation options in the Washington, DC region. To view the full report, go to www.commuterconnections.org.

TRANSPORTATION SATISFACTION

The 2013 survey included a question to explore commuters’ satisfaction with the transportation network in the Washington metropolitan region. Commuters generally are less satisfied with transportation in the region than they are with their particular commute. Commuters appear, however, to be slightly more satisfied than they were in 2010; in the 2010 SOC, only 40% of regional commuters rated their transportation satisfaction as a 4 or 5.

Ratings for Transportation Satisfaction—Rating of 4 or 5
(2010 n = 6,420, 2013 n = 5,486)



Transportation Satisfaction by Home Location

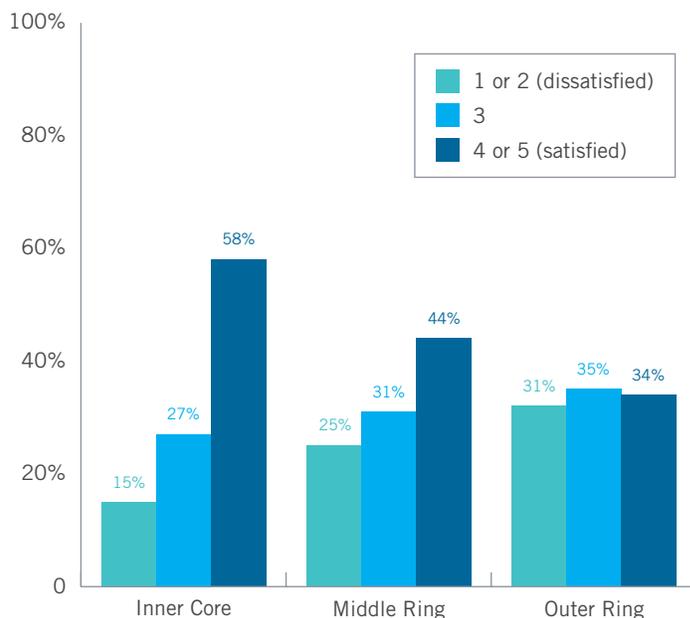
Respondents who live in the Inner Core give a considerably higher rating for transportation satisfaction than do respondents in either the Middle Ring or Outer Ring.



44% of regional commuters rated their transportation satisfaction as a 4 or 5.

Ratings for Satisfaction with Regional Transportation—Rating of 4 or 5 By Home Area

(Inner Core n = 1,528, Middle Ring n = 1,505, Outer Ring n = 2,453)

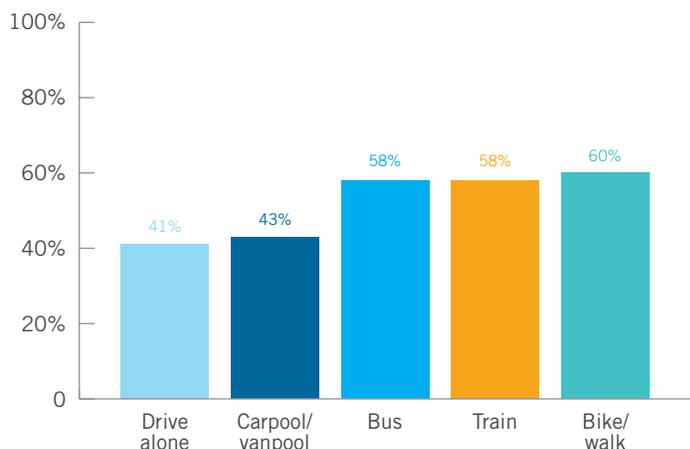


Transportation Satisfaction by Commute Mode

Respondents who drove alone and those who carpooled/vanpooled gave the lowest ratings for transportation satisfaction; about four in ten of respondents in these two mode groups are satisfied. Respondents who use transit or bike/walk for commuting give higher satisfaction ratings, with about six in ten respondents in these mode groups rating satisfaction as a 4 or 5. One common trait of higher-rated modes is that these commuters do not drive, so they may be better able to avoid congestion.

Ratings for Transportation Satisfaction—Rating of 4 or 5 By Primary Commute Mode

(Drive alone n = 3,873, Carpool/vanpool n = 352, Bus n = 296, Train n = 674, Bike/walk n = 148)





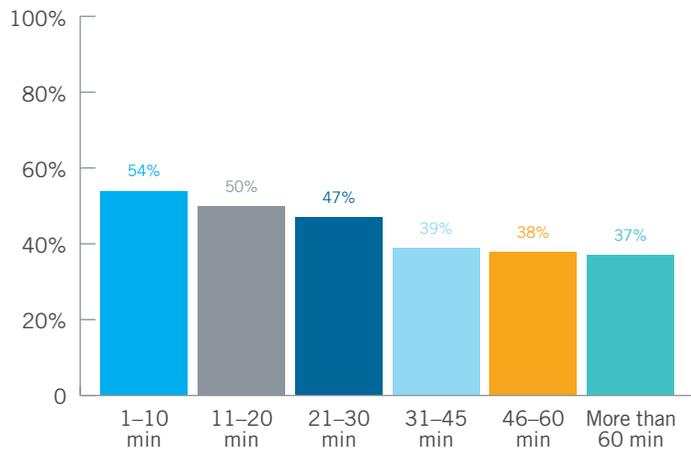
Transportation Satisfaction by Travel Time

There is a clear pattern between increasing commute travel time and declining transportation satisfaction. Satisfaction falls as the length of the commute increases, from a high of 54% satisfaction for respondents who have commutes of 10 minutes or less, to 37% for respondents who travel more than an hour to work

Ratings for Transportation Satisfaction—Rating of 4 or 5

By Commute Travel Time (minutes)

(1–10 min n = 663, 11–20 min n = 1,213, 21–30 min n = 1,009, 31–45 min n = 1,279, 46–60 min n = 771, More than 60 min n = 670)



Transportation Satisfaction by Proximity to Transit

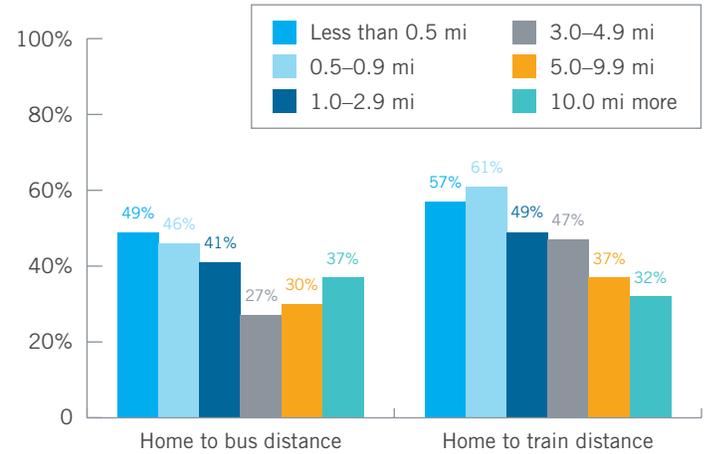
Transportation satisfaction also appears to be related to a respondent's proximity to bus and train stops. Respondents who live close to transit give higher marks for transportation satisfaction than do respondents who live farther away.

Ratings for Transportation Satisfaction—Rating of 4 or 5

By Distance from Home to Bus Stop and Distance from Home to Rail Station (miles)

(Bus stop Distance—Less than 0.5 mi n = 2,492, 0.5–0.9 mi n = 657, 1.0–2.9 mi n = 749, 3.0–4.9 mi n = 337, 5.0–9.9 mi n = 454, 10.0 mi or more n = 441)

(Train station Distance—Less than 0.5 mi n = 366, 0.5–0.9 mi n = 522, 1.0–2.9 mi n = 1,058, 3.0–4.9 mi n = 531, 5.0–9.9 mi n = 752, 10.0 mi or more n = 1,893)



Transportation Satisfaction by Commute Satisfaction

Overall, about 64% of respondents said they are satisfied with their commute, but only 44% are satisfied with the regional transportation system. This implies that most commuters have found an acceptable commute option, but that many still feel the regional transportation is lacking, perhaps because they were considering both work and non-work travel in making their transportation satisfaction ratings.

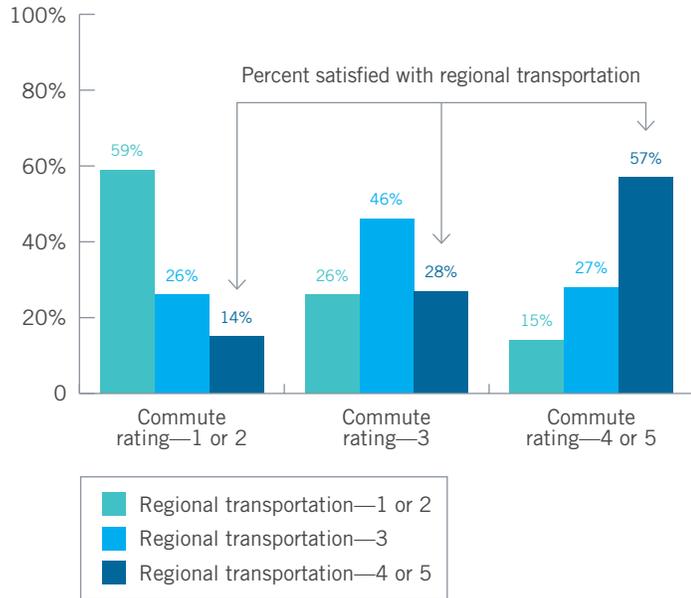
However, as illustrated in this figure, respondents' satisfaction with their commute certainly appears related to their satisfaction with transportation in the region.



64% of respondents said they are satisfied with their commute, but only **44%** are satisfied with the regional transportation system.



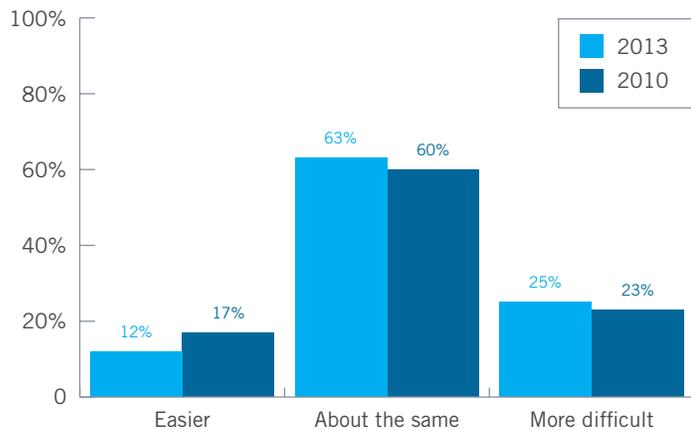
Satisfaction with Regional Transportation by Commute Satisfaction
(Commute Rating 1 or 2 n = 934, Commute Rating 3 n = 1,079, Commute Rating 4 or 5 n = 3,614)



EASE OF COMMUTE

Respondents who did not telecommute or work at home all the time were asked if their commute time is easier, more difficult, or about the same as it was a year prior. Most (60%) respondents said their commute is about the same as a year ago.

Commute Easier, More Difficult, or About the Same as Last Year—2010 and 2013
(2010 n = 6,049, 2013 n = 5,717)



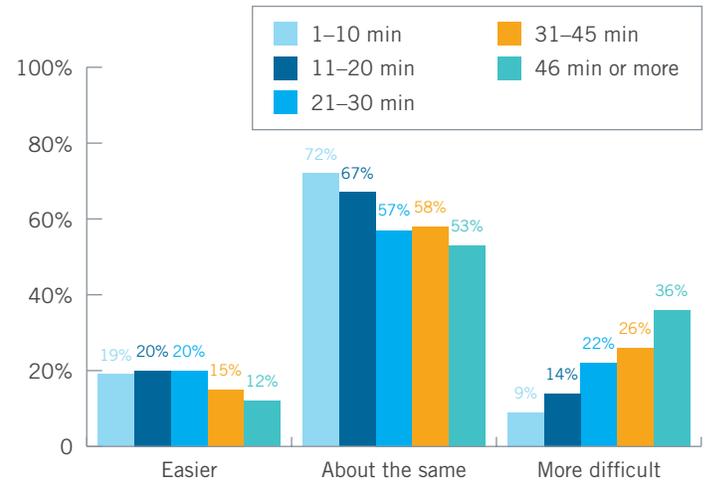
Change in Commute Ease by Travel Time

The next figure displays the shares of commuters who reported that their commute was more difficult, about the same, and easier, by the

amount of time they spend commuting. The share of commuters who report an easier commute is not substantially different for commuters with longer commutes, but the share who said they have a more difficult commute increases steadily as the commute time increases.

Commute Easier, More Difficult, or About the Same as Last Year By Commute Length (minutes)

(1 to 10 min n = 663, 11 to 20 min n = 1,213, 21 to 30 min n = 1,009, 31 to 45 min = 1,279, 46 min or more n = 1,441)



Influence of Changes in Residence or Work Location

Because it was expected that a commute might have become easier or more difficult because the origin and/or destination of the commute changed, all respondents were asked if they had made a change in their work location and/or home location in the past year. This table displays results of commute ease for respondents who did and did not make a move.

Commute Compared to Last Year

by Made a Change in Home or Work Location

Changed Home or Work Location	(n =)	Easier	About the Same	More Difficult
No change	4,800	12%	65%	22%
Any change	927	41%	33%	26%
Type of change made				
Changed home	272	32%	45%	23%
Changed work	465	41%	29%	30%
Changed home and work	190	56%	24%	20%

The percentages shown in the table suggest the ease or difficulty of the commute appears to be related to moves for at least some of the respondents.

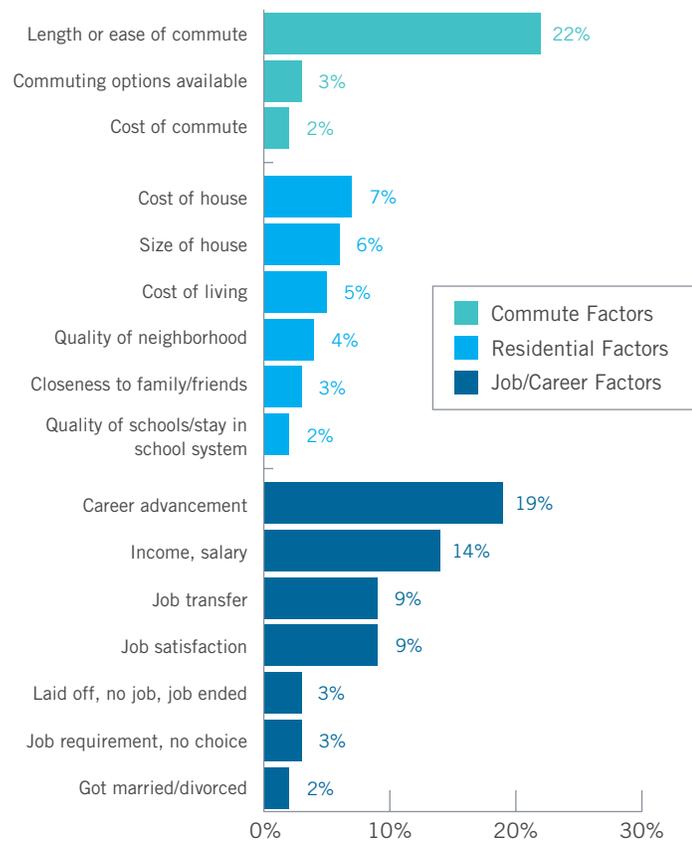
While a move can play a role in either improving or worsening a commute, data collected shows that a move improves the commute more often than it worsens it.



The table also shows a breakdown of change in commute conditions by the type of move made: home only, work only, or both home and work. More than half of the commuters who made both home and work changes improved their commute, while respondents who made only one of the changes were less likely to have the change result in an improvement.

Commuting as a Factor in Location Change Decisions—Anecdotal reports suggest that some commuters might move their residences and/or seek new jobs at least in part to make their commute easier or less costly. Several survey questions explored the influence commute factors might have on commuters’ home or work location decisions. Respondents who said they made a change were asked what factors they considered in making the change and how important to their decision the ease of the trip to work was compared with other factors they considered. This next figure displays the decision factors respondents mentioned.

Factors Considered in Home or Work Location Changes
 Respondents who Made a Change in Work or Residence Location
 (Note: Scale extends only to 30% to highlight difference in responses)
 (n = 927, multiple responses permitted)



Four groups of respondents were particularly likely to cite commute factors as part of their decision process presumably, because they expected to encounter a more difficult commute with their move or because they wanted to improve their commute with the move:

- **Respondents who live in the Middle Ring**—29% of respondents who live in the Middle Ring sub-area noted commute factors, compared with 19% of Inner Core and 20% of Outer Ring respondents
- **Respondents who work in the Middle Ring**—32% of Middle Ring respondents named commute factors, compared with 19% of Inner Core and 22% of Outer Ring workers.
- **Respondents who moved from another location in the Washington region**—27% of respondents who moved within the region named commute factors, compared with 18% for respondents who moved from outside the region
- **Respondents who are between 25 and 34 years old**—32% of respondents who are between 25 and 34 named commute factors, compared with 18% of respondents who are younger than 25, 26% of respondents who are between 35 and 44, and 24% of respondents who are 45 or older.

Respondents who had made a move were asked how important commuting factors had been to their decision, relative to the other factors they considered. It is clear that commuting has been an important factor over the past six years.

Importance of Commute Ease Relative to Other Factors Considered in Home or Work Location Changes
 Respondents who Made a Change in Work or Residence Location
 (2013 n = 850, 2010 n = 887, 2007 n = 981)

Importance of Commute Ease	2013 SOC	2010 SOC	2007 SOC
More important than other factors	28%	29%	30%
About the same importance as other factors	46%	38%	44%
Less important than other factors	26%	33%	27%

Respondents who made a residential location change were asked if their employers had offered any information about financial incentives that might be available if the respondent moved to a home that was closer to the work location or moved closer to a bus stop or transit station. These questions were designed to measure the impact of the “Live Near Your Work” program that Commuter Connections implemented in 2008. This program encourages employers to inform employees of several state and/or federal financial incentives offered to employees who choose a home location that reduces the distance they travel to work or who choose a home location near a transit stop.

In 2013, eight percent of respondents who moved their homes received information from their employers. This is about the same percentage as reported receiving information in 2010 (6%). Nine percent said they received information on financial incentives to move closer to transit, twice the four percent who noted this information in the 2010 SOC survey.

BENEFITS OF RIDESHARING

Questions also were added to the 2013 SOC survey to assess commuters' opinions about the benefits generated by commuters' use of alternative modes. First, all respondents were asked, "What impacts or benefits does a community or region receive when people use alternative modes?" Then, respondents who use alternative modes were asked two questions about the personal benefits of alternative modes:

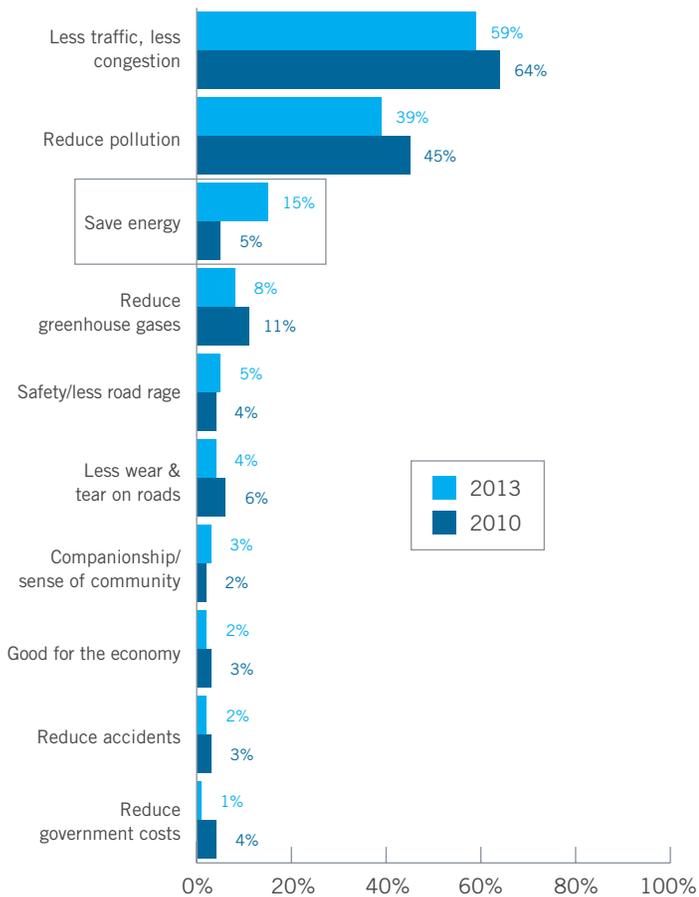
- You said you [bicycle, walk, carpool, vanpool, ride public transportation] to work some days. What benefits have you personally received from traveling to work this way?
- On days that you [carpool, vanpool, ride public transportation] to work, how often do you do you read or write work-related material or check work messages on the way to work?

Societal Benefits of Alternative Mode Use

When asked what benefits a region or community receives from use of alternative modes, 81% of respondents named at least one benefit.

Regional/Community Benefits of Alternative Mode/Use

Asked of All Commuters
(2013 n = 5,718, 2010 n = 6,050)



The figure also shows the responses to this question from the 2010 SOC survey. Generally, the responses for 2013 are similar to

the 2010 results, except that fewer 2013 respondents mentioned traffic reduction and pollution reduction/reduce greenhouse gases and a much larger share of 2013 respondents mentioned saving energy.

Personal Benefits of Alternative Mode Use

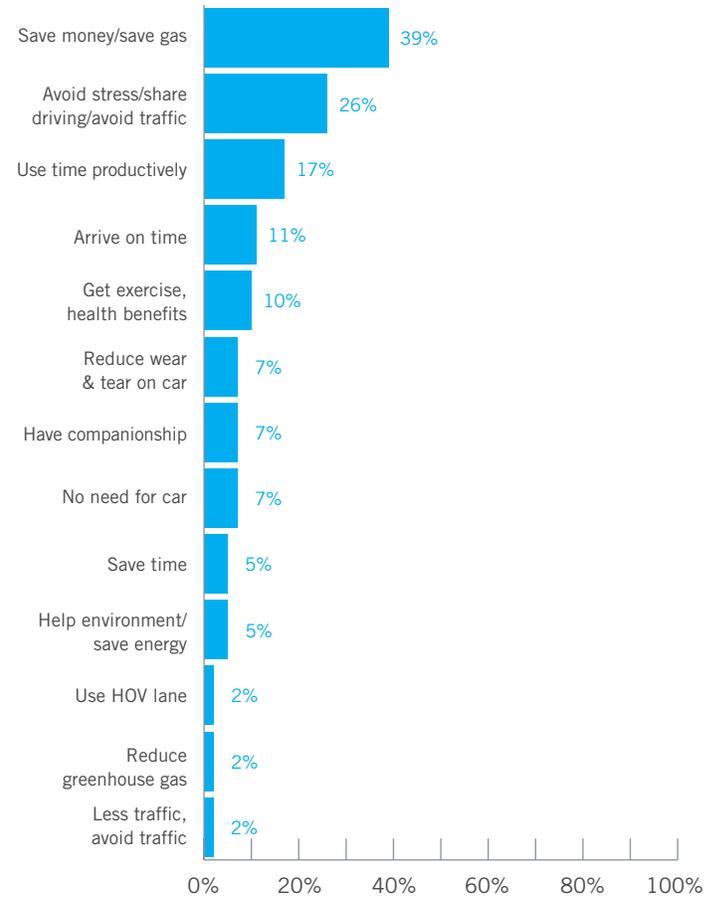
When respondents who use alternative modes for their commute were asked what personal benefits they receive from using these modes, 90% named at least one benefit. As shown in the figure below, saving money or gas topped the list of personal benefit.

Respondents also cited benefits that have a connection to quality of life. One-quarter of respondents said they avoid stress/share driving/avoid traffic, and 17% said using an alternative mode enables them to use their travel time productively.

Personal Benefits of Alternative Mode Use

Asked Only of Alternative Mode Users

(n = 1,575)



Differences in Personal Benefits by Primary Commute Mode—

Respondents who use different alternative modes for their commute report receiving different personal benefits. Carpoolers/vanpoolers report saving money and saving time, having companionship during their commute, arriving on time, and avoiding stress as benefits.



Transit riders primarily mention saving money, avoiding stress, and being able to use travel time productively. Bus riders also noted saving money and train riders also mentioned arriving at work on time. Commuters who bicycle or walk to work overwhelmingly note getting exercise as a benefit of this mode. They also note several of the benefits mentioned by transit riders (avoid stress, no need for car, arrive at work on time), as well as the altruistic benefit of helping the environment.

Personal Benefits of Alternative Mode Use

By Primary Commute Mode

(Carpool/Vanpool n = 363, Bus n = 298, Train n = 678, Bike/Walk n = 150 *Shaded percentages indicate statistical differences*)

Personal Benefit	Carpool/Vanpool	Bus	Train	Bike/Walk
Save money	45%	43%	32%	38%
Avoid stress, relax	13%	29%	32%	34%
No need for a car	3%	9%	9%	10%
Use travel time productively	8%	19%	24%	5%
Less wear and tear on car	10%	6%	6%	4%
Get exercise	0%	4%	6%	80%
Save time, travel faster	9%	2%	4%	2%
Help the environment	2%	2%	1%	8%
Have companionship during commute	17%	2%	2%	1%
Arrive at work on time	16%	7%	11%	11%

* Each response in the "Other category" mentioned by less than one percent of respondents.

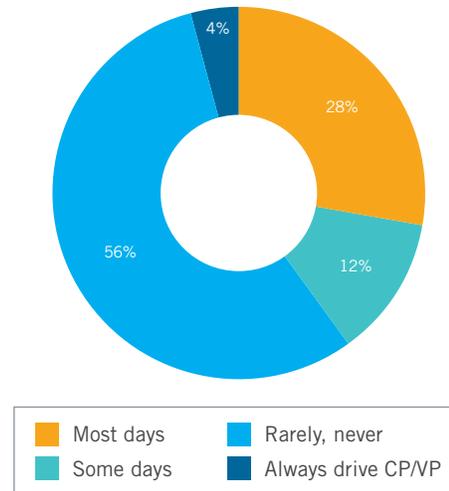
Productive Use of Personal Travel Time

The third question in this series is about travel benefits explored the idea that commuters who use alternative modes can make productive use of their travel time. Commuters who carpool, vanpool, or ride transit to work were asked how often they read or write work-related material or check work messages on the way to work. Having time to catch up on work tasks could make their time at the worksite more productive and less stressful. As shown in this figure, four in ten of these commuters perform work-related tasks during the commute.

Conducting work-related business during the commute is more common among transit riders than carpoolers. Nearly half (47%) of train riders and 41% of bus riders said they perform work-related tasks during their commute, compared with 24% of carpoolers. Young commuters also perform these tasks at a higher rate than average; 50% of commuters who are younger than 24 years old perform these tasks most days (21%) or some days (18%).

 **41% of bus riders said they perform work-related tasks during their commute, compared with 24% of carpoolers.**

Frequency of Work-Related Tasks During Commute Time
Asked Only of Alternative Mode Users
(n = 1,438)



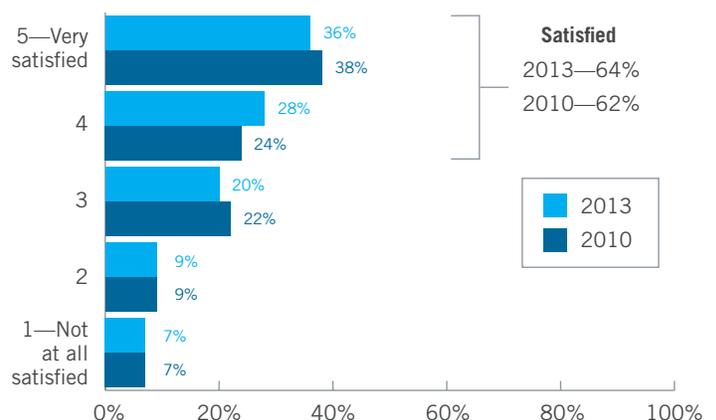
COMMUTE SATISFACTION

The 2013 survey included a question asking commuters to rate how satisfied they are with their trip to work. As shown in the next figure, 64% rated their commute satisfaction as a "4" or "5" on a 5-point scale, where "5" meant "very satisfied."

Commute satisfaction in 2013 is very similar to that measured in the 2010 SOC survey. In 2010, 62% reported being satisfied and 22% gave a middle rating of 3.

Satisfaction with Commute

(2010 n = 6,033, 2013 n = 5,692)



Commute Satisfaction by Home and Work Location

Commute satisfaction also differs by where in the region the respondent lives and works. The next figure presents the percentages of commuters in each of the three areas of the region who rate their commute satisfaction as a 4 or 5. Respondents who live in the Inner Core are notably more satisfied with their commute than are

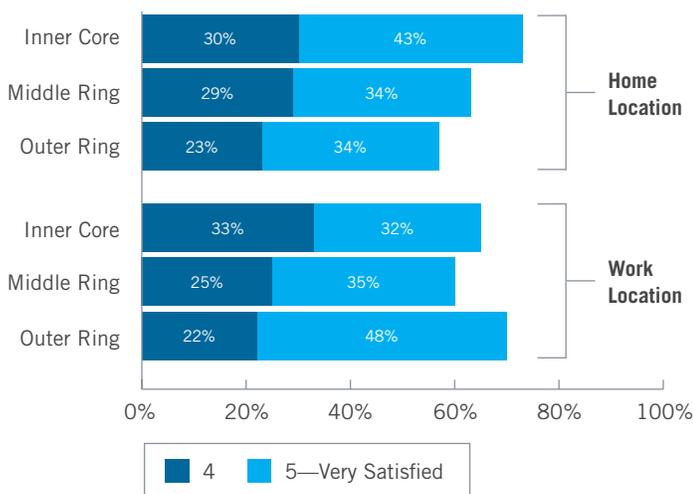


respondents who live in the Middle Ring or Outer Ring areas. But respondents who work in the Outer Ring are more satisfied than are respondents who work in the Inner Core and Middle Ring.

Satisfaction with Commute—Percent Rating Commute a 4 or 5 by Home and Work Area

(Home Area—Inner Core n = 1,551, Middle Ring n = 1,560, Outer Ring n = 2,607)

(Work Area—Inner Core n = 2,441, Middle Ring n = 1,866, Outer Ring n = 1,389)

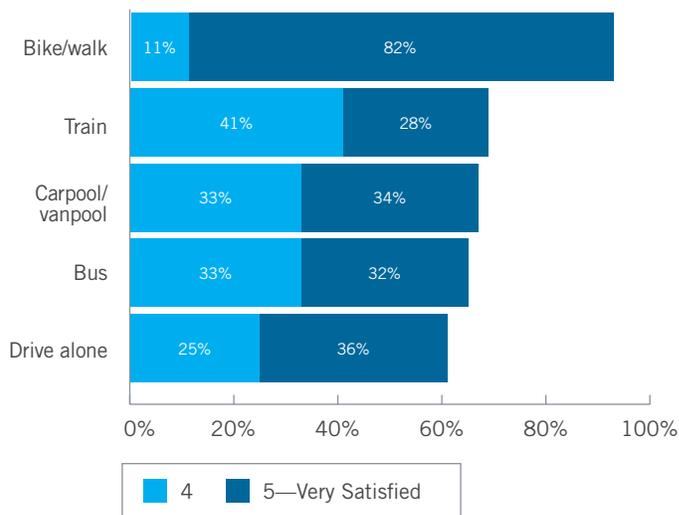


Commute Satisfaction by Commute Mode

As evident in this next figure, more than nine in ten bikers/walkers reported high commute satisfaction. Other respondents are about equally satisfied with their commute, regardless of the mode they primarily use to get to work.

Satisfaction with Commute—Percent Rating Commute a 4 or 5 By Primary Commute Mode

(Bike/walk n = 150, Train n = 678, Carpool/Vanpool n = 363, Bus n = 298, Drive alone n = 4,080)

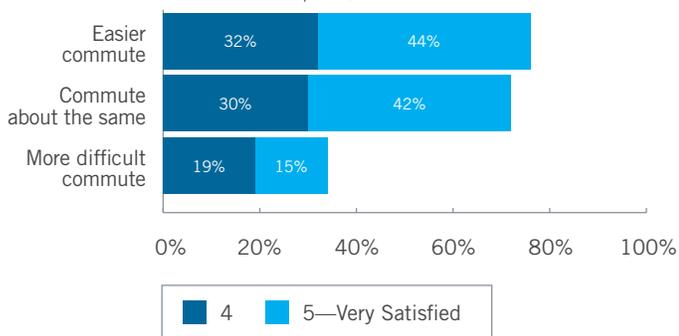


Commute Satisfaction by Ease of Commute Compared with a Year Ago

Respondents' level of satisfaction with their commute is influenced by the ease of the commute. As illustrated in this figure, 76% of respondents who said they have an easier commute than last year and 72% who said their commute has not changed are satisfied with their commute, compared to only 34% who said their commute has become more difficult.

Satisfaction with Commute—Percent Rating Commute a 4 or 5 by Ease of Commute

(Easier commute n = 843, Commute about the same n = 3,492, More difficult commute n = 1,283)



Commute Satisfaction by Travel Time

Commute satisfaction declines steadily and significantly as the amount of time a commuter travels increases. As shown in this next figure, 94% of commuters who have very short commutes—10 minutes or less—give a 4 or 5 rating for satisfaction.

Satisfaction with Commute—Percent Rating Commute a 4 or 5 By Length of Commute in Minutes

(1–10 min n = 663, 11–20 min n = 1,213, 21–30 min n = 1,009, 31–45 min n = 1,279, 46–60 min n = 771, More than 60 min n = 670)

