2022

STATE OF THE COMMUTE
"AT-A-GLANCE" SURVEY SECTION

FROM THE WASHINGTON DC METROPOLITAN REGION

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TRANSPORTATION OPTION ATTITUDES AND AWARENESS

THIS IS A "AT-A-GLANCE" SECTION FROM THE 2022 STATE OF THE COMMUTE (SOC) REPORT SHOWING KEY FIGURES AND TABLES ON REGIONAL ATTITUDES AND AWARENESS TOWARDS TRANSPORTATION OPTIONS IN THE WASHINGTON, DC REGION. TO VIEW THE FULL REPORT, GO TO WWW.COMMUTERCONNECTIONS.ORG.

TRANSPORTATION OPTION ATTITUDES AND AWARENESS

The 2022 SOC survey included a series of questions to explore residents' impressions of the role commuter transportation plays in creating a livable area, and their satisfaction with their commute mode shifts and motivations for making commute changes, satisfaction with their daily commute, the ease of their commute, and how commuting affects residential and work location changes.

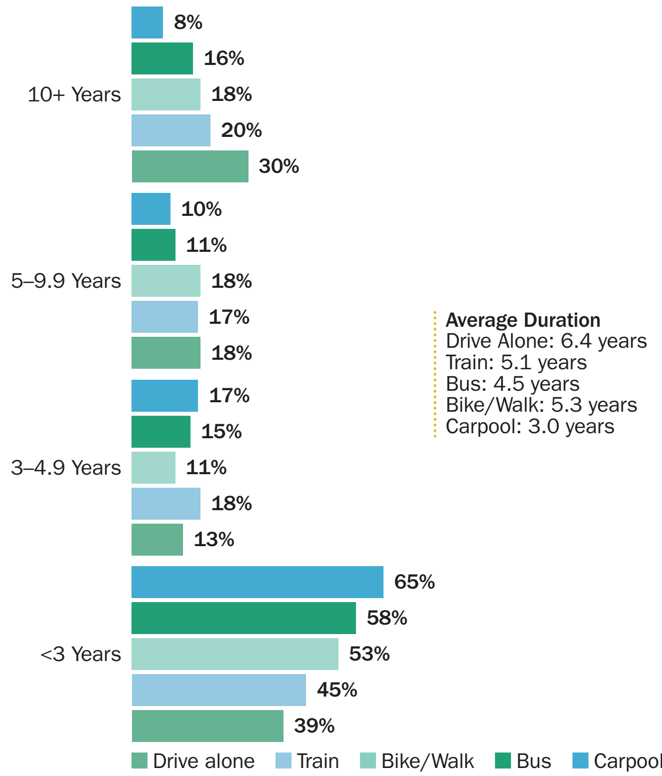
Commute Mode Shifts and Mode Shift Motivations

LENGTH OF TIME USING MODE

Respondents were asked how long they had used each mode they reported using one or more days per week. Commuters who drove to work had used this mode the longest, an average of 6.4 years. Three in ten (30%) drive alone commuters used this mode 10 years or more and 48% had been driving alone for five or more years. About four in ten (39%) started using this mode less than three years ago.

Alternative mode users had used their modes for shorter durations, ranging from an average of 3.0 years (carpool) to 5.3 years (bike/walk). But a substantial portion of alternative mode users still were long-term users; 37% of train riders, 36% of bike/walk commuters, 27% of bus riders, and 18% of carpoolers had used these modes for five or more years. Carpoolers and bus riders were most likely to have started using these modes recently; 65% of commuters who carpooled and 58% of bus riders started using these modes within the past three years. About half (53%) of bikers/walkers and 45% of train riders started these modes less than three years ago.

Duration of Mode Use by Primary Commute Mode
(Drive alone n = 3,755, Train n = 595, Bus n = 280, Bike/Walk n = 294, Carpool n = 148)

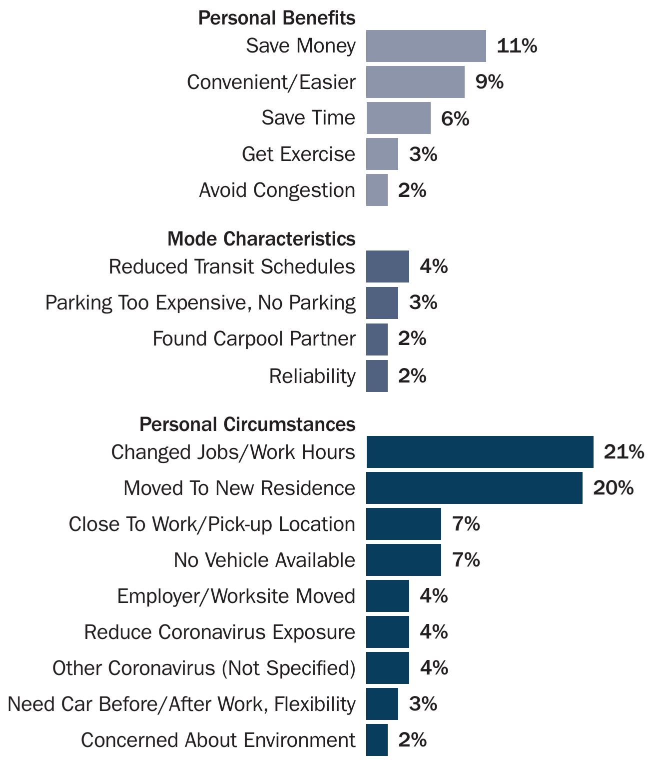


Reasons for Changing Mode

Respondents who Started a New Alternative Mode – Respondents who had been using an alternative mode for three years or less were asked why they began using those modes. The reasons are listed in the next figure and divided into three broad categories:

- **Personal benefits –** benefits the respondent would expect to receive by using an alternative mode
- **Commute mode characteristics –** characteristics, either positive or negative, that had encouraged or discouraged use of a mode
- **Personal circumstances –** personal circumstances or changes experienced by the respondent

Motivations to Start Using Current Alternative Mode
(n = 378, multiple responses permitted)



Note: Scale extends only to 30% to highlight differences in responses.

Current alternative mode users cited motivations in each of the three categories. The most common personal benefit reasons were to save money (11%), that the new mode was more convenient to use (9%), or to save time (6%). The most common reason in the mode characteristics category was that transit service/schedule had been reduced, noted by 4% of respondents. The top two personal circumstances reasons to shift to an alternative mode were changing jobs or work hours (21%) and moving to a new residence (20%). Other personal circumstances included living close to work or to a transit pick-up location (7%) and not having a vehicle available (7%).

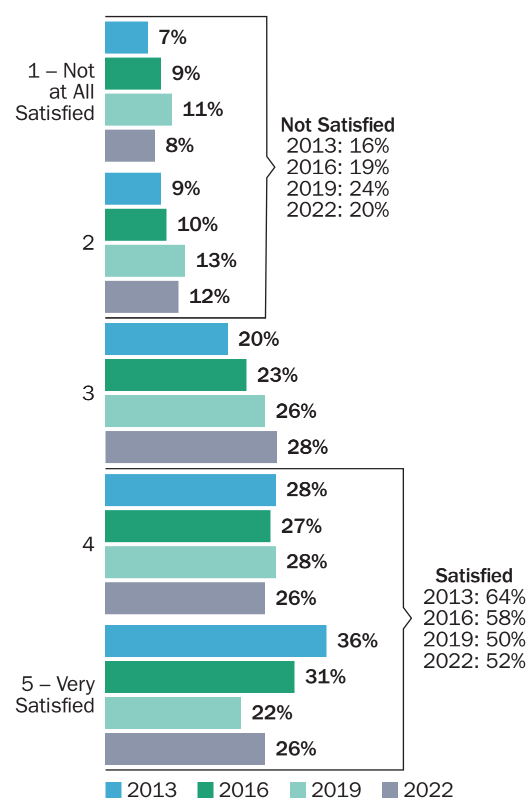
Respondents who Started Driving Alone – Respondents who started driving alone to work in the past three years gave some of the same reasons for switching modes as did alternative mode users; 16% of new drive alone users had changed jobs or work hours, 8% moved to a new residence, 7% wanted to save time, and 6% said driving alone was easier or more convenient. These results suggest both drive alone and alternative mode shifts are made to respond to changing personal circumstances. But respondents who started driving alone reported greater concerns about coronavirus than did alternative mode users; 11% of commuters who started driving alone said they wanted to avoid getting COVID-19 and 7% simply said "coronavirus pandemic." Twelve percent switched due to reduced or unreliable transit service and 7% said they lost a carpool partner; these also could have been pandemic-related.

Commute Satisfaction

The 2022 survey included a question that had been asked in several previous SOC surveys about how satisfied commuters were with their trip to work. As with other questions about the current commute experience, respondents who were working from home/teleworking full-time were not asked this question, so this section reflects responses only for those who were commuting to an outside location one or more days per week.

In 2022, 52% rated their commute satisfaction as a "4" or "5" on a 5-point scale, where "5" meant "very satisfied." Twenty-eight percent gave a rating of 3 and 20% rated their satisfaction as either a "1 – not at all satisfied" (8%) or 2 (12%).

Satisfaction with Commute – 2013 to 2022
(2013 n = 5,692, 2016 n = 5,217, 2019 n = 7,911, 2022 n = 5,131)



Commute satisfaction in 2022 was about the same as in 2019, when 50% of respondents rated their satisfaction as a 4 or 5 (very satisfied). But satisfaction has declined since 2013, when nearly two-thirds (64%) of SOC respondents said they were satisfied with their commute. The percentage satisfied fell over the next three years to 58% in 2016. Satisfaction declined even more between 2016 and 2019, to 50%, the lowest percentage since the question was added to the SOC survey in 2010. The uptick to 52% in 2022 is not a significant change.

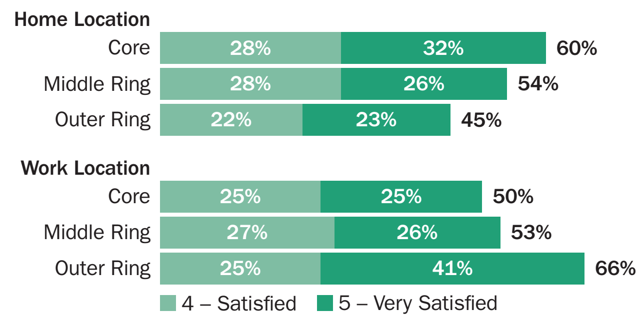
Over the years since 2013, the most striking change has been in the percentage of respondents who reported being very satisfied (rating of 5). In 2013, 36% of all respondents said they were very satisfied. That percentage dropped in each of the subsequent survey years, to a low of 22% in 2019. In 2022, the percentage of very satisfied commuters increased slightly, to 26%.

COMMUTE SATISFACTION BY HOME AND WORK LOCATION

Respondents who lived in the Core area were notably more satisfied with their commute than were respondents who lived farther out in the region.

Satisfaction with Commute by Home and Work Area

Percent Rating Commute Satisfaction a 4 or 5
(Home Area – Core n = 1,456, Middle Ring n = 1,569, Outer Ring n = 2,106)
(Work Area – Core n = 2,261, Middle Ring n = 1,822, Outer Ring n = 703)

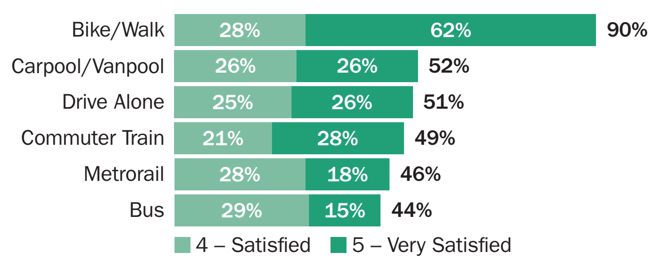


COMMUTE SATISFACTION BY COMMUTE MODE

Commute satisfaction appeared more related to commute mode than to demographics. Nine in ten (90%) commuters who walked or biked to work reported high commute satisfaction. About half of carpoolers/vanpoolers (52%) and drive alone commuters (51%) reported high satisfaction.

Satisfaction with Commute by Primary Commute Mode

Percent Rating Commute a 4 or 5
(Bike/walk n = 190, Carpool/vanpool n = 119, Drive alone n = 3,364, Commuter train n = 47, Metrorail n = 393, Bus n = 209)

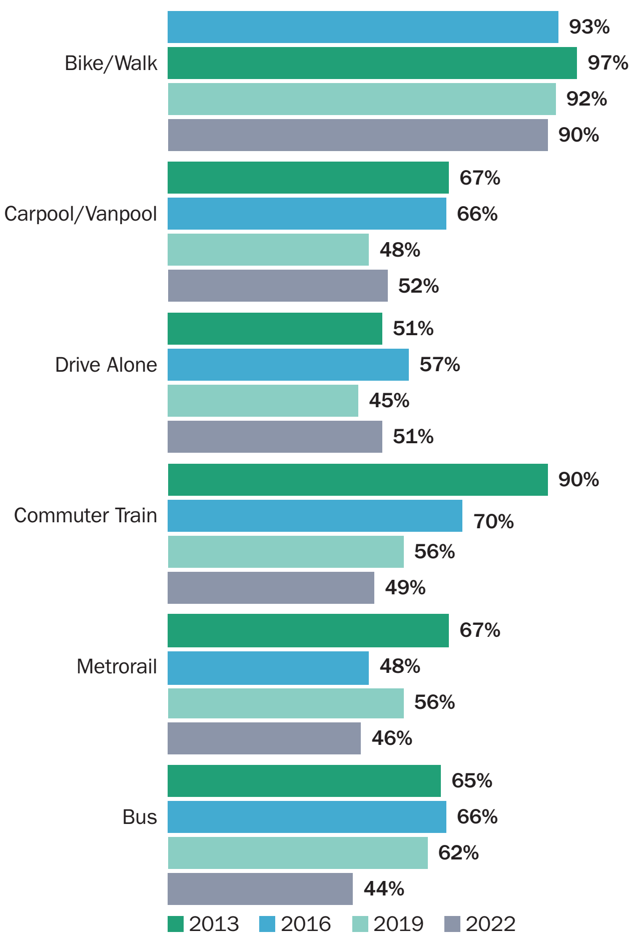


Satisfaction by Mode from 2013 to 2022 – Commute satisfaction among bike/walk commuters has been high since 2013 but has fluctuated for other mode users over the 9-year period.

Satisfaction with Commute by Primary Commute Mode – 2013 to 2022

Percent Rating Commute Satisfaction as 4 or 5

(2013: Bike/walk n=150, Carpool/vanpool n=363, Drive alone n=4,080, Commuter train n=64, Metrorail n=615, Bus n=298)
(2016: Bike/walk n=180, Carpool/vanpool n=283, Drive alone n=3,552, Commuter train n=62, Metrorail n=634, Bus n=284)
(2019: Bike/walk n=302, Carpool/vanpool n=378, Drive alone n=5,042, Commuter train n=144, Metrorail n=1,177, Bus n=588)
(2022: Bike/walk n=190, Carpool/vanpool n=119, Drive alone n=3,364, Commuter train n=47, Metrorail n=393, Bus n=209)



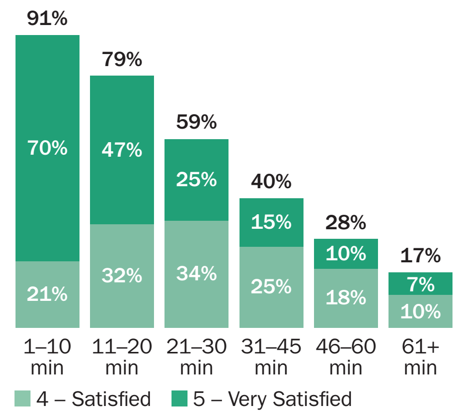
COMMUTE SATISFACTION BY TRAVEL TIME

Commute satisfaction declined steadily and significantly as the amount of time a commuter traveled increased.

Satisfaction with Commute by Length of Commute (minutes)

Percent Rating Commute Satisfaction a 4 or 5

(1-10 min n = 353, 11-20 min n = 1,032, 21-30 min n = 1,018, 31-45 min n = 1,193, 46-60 min n = 804, 61+ min n = 626)

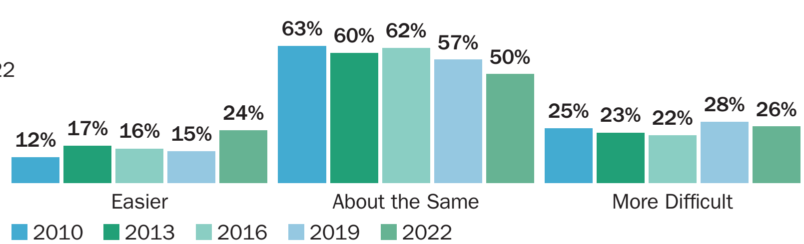


Ease of Commute

Respondents who commuted to an outside work location at least one day per week also were asked if their commute was easier, more difficult, or about the same as it was a year prior.

Commute Easier, More Difficult, or About the Same as Last Year – 2010 to 2022

(2010 n = 6,049, 2013 n = 5,717, 2016 n = 5,142, 2019 n = 7,787, 2022 n = 5,067)

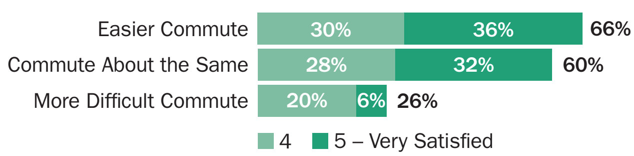


COMMUTE SATISFACTION BY EASE OF COMMUTE COMPARED WITH A YEAR AGO

Commuters' satisfaction with commuting appeared related to the ease or difficulty of commuting. Two-thirds (66%) of respondents who said they had an easier commute than last year and 60% who said their commute had not changed were satisfied with their commute, compared with only 26% who said their commute had become more difficult.

Satisfaction with Commute by Change in Ease of Commute

Percent Rating Commute Satisfaction a 4 or 5
(Easier commute n = 1,106, Commute about the same n = 2,637, More difficult commute n = 1,273)



CHANGE IN COMMUTE EASE BY PRIMARY COMMUTE MODE

Commute satisfaction had improved for carpool/vanpool and drive alone commuters between 2019 and 2022 but had declined for transit riders.

Commuters who carpooled or vanpooled were about equally likely to report an easier commute (29%) as a more difficult commute (27%). Drive alone respondents had similar results. Respondents who primarily biked or walked to work were least likely to report a worse commute; only 10% said it was more difficult, but most (75%) reported a commute that was about the same.

Train and bus riders reported a less positive experience. More than twice as many bus riders said they had a more difficult commute (42%) as said their commute was easier (18%). Train riders reported an even starker situation; half (50%) said their commute had become worse, more than three times the percentage who said it improved (15%). These results reinforce the decline in commute satisfaction of transit riders and the increase in commute satisfaction of carpool/vanpool riders and drive alone commuters.

Change in Ease of Commute by Primary Commute Mode

(Shading indicates statistically higher percentages of ease or difficulty)

PRIMARY MODE	EASIER	ABOUT THE SAME	MORE DIFFICULT
Telework* (n = 772)	33%	45%	22%
Carpool/Vanpool (n = 119)	29%	44%	27%
Drive alone (n = 3,339)	24%	53%	23%
Bus (n = 207)	18%	40%	42%
Train (n = 426)	15%	35%	50%
Bike/Walk (n = 191)	15%	75%	10%

*Includes respondents who primarily teleworked but did NOT telework full-time; full-time teleworkers were not asked the question about commute ease/difficulty.

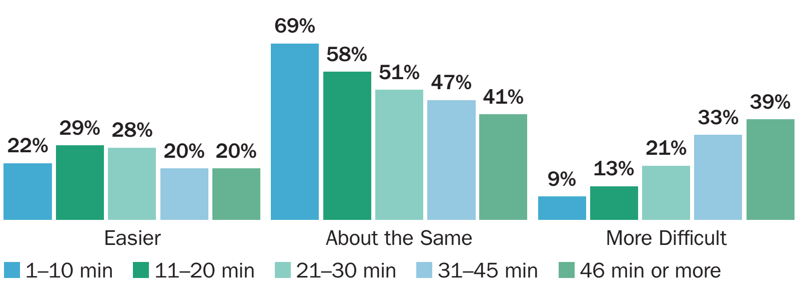
Respondents who teleworked full-time were excluded from this question, but the question was asked of respondents who worked from home some days. One-third (33%) of respondents who primarily teleworked said they had an easier commute in 2022, while only 22% said their commute was more difficult. It seems reasonable to expect that eliminating some commute days could have influenced teleworkers' overall perception of commute ease.

CHANGE IN COMMUTE EASE BY TRAVEL TIME

The figure below presents change in commute ease by respondents' commute time, and shows a clear pattern; the ease of commuting was inversely proportionate to the length of the commute. Conversely, the share who had a more difficult commute increased steadily with increasing commute time.

Change in Ease of Commute by Commute Time (minutes)

(1 to 10 min n = 352, 11 to 20 min n = 1,020, 21 to 30 min n = 1,012, 31 to 45 min = 1,174, 46 min or more n = 1,410)



CHANGE IN COMMUTE EASE BY HOME AND WORK LOCATION

Respondents who lived in the Core of the region were more likely to report that their commute was worse than one year ago than were commuters who lived farther from the center. One-third (32%) of Core area residents said their commute was more difficult, compared with 24% of Middle Ring residents and 25% of Outer Ring residents.

Change in Ease of Commute in Past Year by Home Location – 2022 and 2019

(Shading indicates statistically higher percentages)

HOME LOCATION	EASIER	ABOUT THE SAME	MORE DIFFICULT
CURRENT (2022 SOC)			
Core (n = 1,432)	22%	46%	32%
Middle Ring (n = 1,551)	25%	51%	24%
Outer Ring (n = 2,084)	21%	53%	25%
PRE-PANDEMIC (2019 SOC)			
Core (n = 2,104)	19%	60%	21%
Middle Ring (n = 2,315)	15%	59%	26%
Outer Ring (n = 3,368)	11%	49%	40%

As seen in the table above, the 2022 results are nearly opposite to what was observed in 2019.

The ease or difficulty of commuting in 2022 also seemed related to where respondents worked, with the same pattern as was noted for home location. More than half (56%) of Core area residents said their commute had changed, compared with 46% of Middle Ring and 40% of Outer Ring workers. Respondents in all three areas reported similar rates of easier commutes (Core 25%, Middle Ring 23%, Outer Ring 23%) but one-third (33%) of respondents who worked in the Core reported a more difficult commute, compared with 23% of Middle Ring and 17% of Outer Ring workers. In 2019, work location did not appear to have an impact on changes in the ease or difficulty of their commute, with commuters in all three work areas reporting similar rates of easier and more difficult commutes.

Influence of Changes in Residence or Work Location on Commuting Conditions

Anecdotal reports suggest some commuters might move their residences and/or seek new jobs at least in part to make their commute easier or less costly and several survey questions explored the role commute factors might play in such decisions. Respondents were asked if they had made a change in their work and/or home location in the past two years. Note that commuters who shifted to full-time telework during the pandemic were asked only about home changes. They were not asked about work location changes because the intent was to examine how job changes and/or moves to different worksites could affect commuting decisions. Many workers lost jobs during 2020 due to business shut-downs related to the pandemic. While many subsequently found new jobs, their "decision" to change jobs or work locations might have been more necessity than choice.

INCIDENCE OF HOME AND WORK LOCATION CHANGES

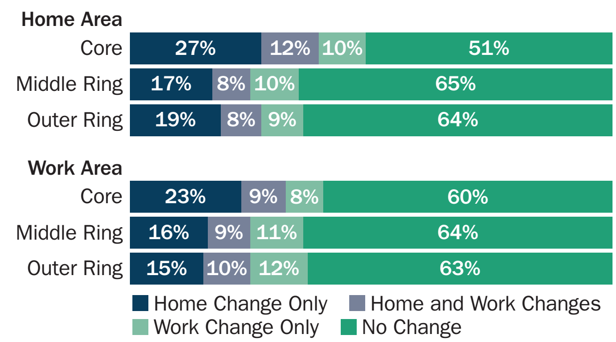
Nearly four in ten respondents reported a location change; 9% changed both home and work, 10% changed only the work location, and 19% changed only the home location. Of the 19% of respondents who changed only the home location, slightly more than half (56%) were full-time teleworkers. The remaining 44% were working outside their home some days; these respondents were asked the work location question and said their work location had not changed.

When combined, these results show that 28% of respondents moved their residence and 19% moved their work location. The 19% who moved to a different work location was about the same as the 20% who reported a work location change in 2019. But the 28% who moved their home was well above the 18% who reported a recent home location in the 2019 survey. About two-thirds (65%) of respondents moved within the Washington metropolitan region and one-third (35%) moved from a jurisdiction outside the Washington region.

Home and Work Location Changes by Home and Work Areas – The next figure presents percentages of respondents who made home or work changes by where they lived at the time of the survey. Nearly half (49%) of Core area residents made a location change in the past two years versus 35% of Middle Ring and 36% of Outer Ring residents. Core area respondents were particularly more likely to have moved their home; nearly four in ten reported a home move (27% home only and 12% home and work), compared with 25% of Middle Ring and 27% of Outer Ring residents. Core area residents also made work location changes at a higher rate; 22% of Core residents moved their work location (12% home and work and 10% work only), compared with 18% of Middle Ring and 17% of Outer Ring residents.

Home and Work Location Changes by Home and Work Areas

(Home Area – Core n = 2,563, Middle Ring n = 2,531, Outer Ring n = 3,046)
(Work Area – Core n = 3,982, Middle Ring n = 2,700, Outer Ring n = 931)



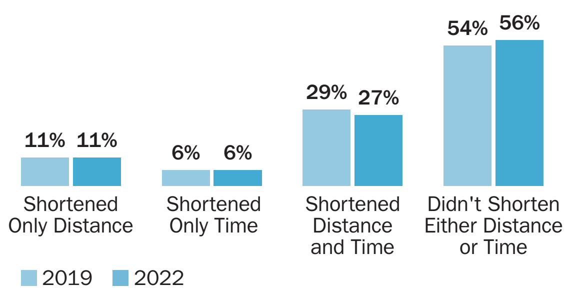
Percentages of respondents who made location changes varied less by where they worked at the time of the survey. About four in ten respondents in each area reported some move. Core workers reported more home moves (32% total; 23% home only and 9% home and work), than did Middle Ring (25%) and Outer Ring (25%) workers. But fewer Core area workers made a work location change (17% total; 9% home and work plus 8% work only) than did Middle Ring (20%) and Outer Ring (22%) workers.

MOVE AS FACTOR IN SHORTENING COMMUTE DISTANCE OR TIME

Nearly three in ten (27%) respondents who moved said the move shortened both the distance and time for their trip to work . For 11%, the move shortened only the distance and 6% said it shortened only the time. These results were very close to the 2019 survey.

Home or Work Move Shortened Distance or Time from Home to Work – 2019 and 2022

(2019 n = 1,960, 2022 n = 2,585)

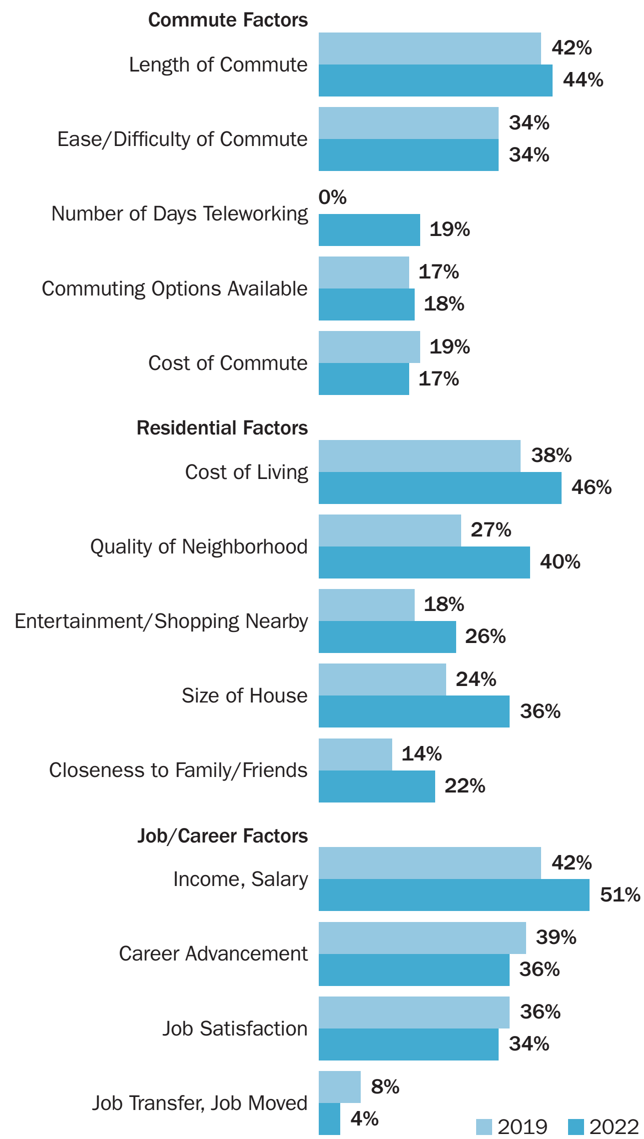


CONCERN ABOUT COMMUTING AS A FACTOR IN LOCATION CHANGE DECISIONS

Respondents who moved also were asked what factors they considered in making location changes and how important to their decision commute ease had been compared with other factors they considered.

Factors Considered in Home or Work Location Changes

Respondents who Made a Change in Work or Residence Location
(2019 n = n = 2,013, 2022 n = 2,657; multiple responses permitted)



Note: Scale extends only to 60% to highlight differences in responses.

Except for the number of days the respondent would be teleworking, which was not included in the list of factors in 2019, the commute factor results were very similar in 2022 to the results from the 2019 survey. The results for residential factors were strikingly different, however. In 2022, more than three-quarters (78%) of respondents mentioned at least one residential factor, compared with about half of respondents in 2019 and every residential factor was cited by a statistically higher share of respondents in 2022 than in 2019. The most common residential factors were the cost of living (46%), quality of the neighborhood (40%), the size of the house (36%), and entertainment and shopping that would be in the neighborhood (26%).

Finally, in 2022, 73% of respondents noted a job or career concern as a factor in their decision, essentially the same percentage that cited one of these factors in 2019. In 2022, respondents mentioned income (51%), career advancement (36%), and job satisfaction (34%) as common considerations. Only income had a statistically different result in 2022 than in 2019.

Several groups of respondents cited commute factors at a statistically higher rate, presumably because they anticipated a more difficult commute after moving or because they wanted to improve their commute by moving:

- **Respondents who worked in the Middle Ring –** 69% of Middle Ring workers named commute factors, compared with 64% of Core area and 64% of Outer Ring workers.

- **Respondents with household incomes under $100,000 –** 71% of respondents with incomes of less than $100,000 mentioned commute factors, compared with 65% of respondents with incomes between $100,000 and $179,999 and 60% of those with higher incomes.

- **Respondents who rode transit to work –** 72% of respondents who primarily rode a train or bus to work had considered commute factors, while only 64% of drive alone commuters, 58% of carpoolers, and 57% of bike/walk commuters considered commute factors.

- **Respondents who changed their home location –** 68% of respondents who made a residence change considered commute factors, compared with 62% of respondents who moved only their work location. Likely, some respondents who moved only their work location would have been required to make the job move to continue their employment, so commuting was less of a motivating factor for these respondents than job or career considerations.

Importance of Commute Ease Relative to Other Factors – Respondents who made a location change also were asked how important the expected ease of their new commute had been to their decisions, relative to other factors they considered.

Importance of Commute Ease Relative to Other Factors in Home or Work Location Changes

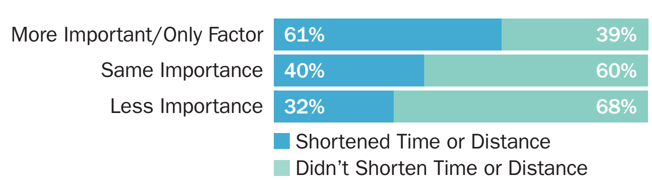
Respondents who Made a Change in Work or Residence Location
(2010 n = 887, 2013 n = 850, 2016 n = 789, 2019 n = 1,921, 2022 n = 2,612)

IMPORTANCE OF COMMUTE EASE	2010	2013	2016	2019	2022
Commute ease was the only factor	—	—	13%	3%	1%
More important than other factors	29%	28%	26%	30%	28%
About the same importance as other factors	38%	46%	42%	42%	46%
Less important than other factors	33%	26%	19%	25%	25%

Importance of Commute Factors by Length of Commute – Respondents who said commuting was important to their decision also were more likely to have a shorter commute after making the move than were respondents who said commuting was not as important. Six in ten (61%) respondents who said commuting was more important or the only factor they considered in the move had a shorter commute after making the move. This suggests respondents who were particularly concerned with commuting ease, length, or cost chose work and/or home locations that improved their commutes. By contrast, only 40% of those who said commute factors had been about the same importance as other factors and 32% who said commute factors were less important than were job, home, or personal factors shortened their commutes.

Importance of Commute Factors by Move Shortened Distance or Time from Home to Work

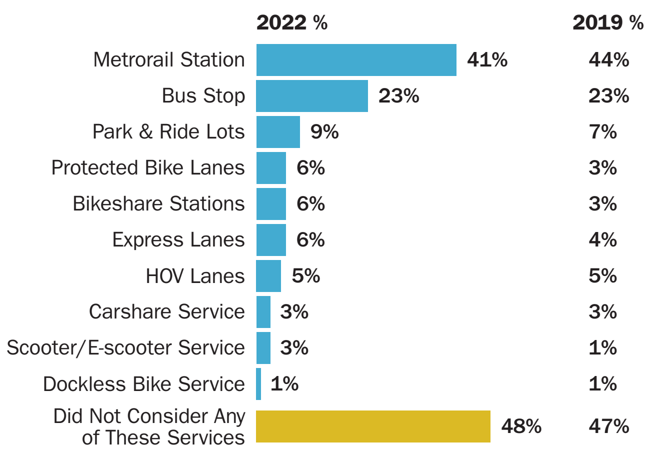
(Commute factors were: More important/only factor n = 681, Same importance n = 1,169, Less important n = 631)



Transportation Services Considered When Making Home or Work Move – Finally, respondents who made a residential or work location change were asked if, when they were considering making this change, they had considered how close their new location would be to any of ten transportation services such as Park & Ride lots, HOV and Express Lanes, bike and scooter servicers, and transit stops or stations.

Access to Transportation Services Considered when Making Home or Work Move

(2019 n = 2,013, 2022 n = 2,697; multiple responses permitted)



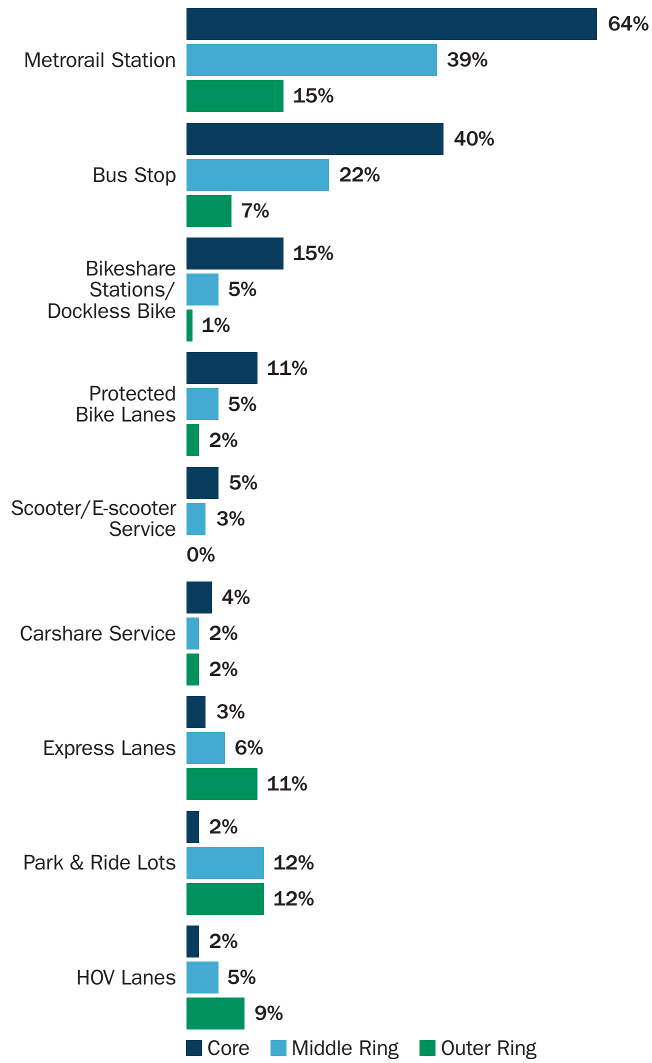
Consideration of these services was highly dependent on where respondents lived and worked.

The lower percentages of Outer Ring residents who explored their access to these services suggests that they assumed, rightly in many cases, that these services would not be available in their new home or work area, or that they would not be useful services for their travel in the new area. Despite their lower overall interest, however, Middle Ring and Outer Ring residents were more likely to have considered their access to Park & Ride lots and to HOV lanes and Express Lanes than were commuters who lived closer to the center of the region.

Access to Transportation Services Considered when Moving – by Home Area

Respondents who Made a Change in Work or Residence Location

(Core n = 823, Middle Ring n = 338, Outer Ring n = 245)



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