

2001/2004 Regional State of Commute Survey Arlington County Results

Presentation
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SOC Survey Overview

- Regional surveys conducted in 2001 and 2004 by MWCOG / Commuter Connections
- Survey sample (2001 and 2004 surveys)
 - 7,200 randomly-selected workers
 - 600 in each of 12 jurisdictions
 - Expanded to populations of workers – jurisdictional and regional levels
 - Survey included 600 respondents who live in Arlington County and 500+ respondents who work in Arlington County

SOC Survey Overview (2)

- **Purpose – Examine:**
 - Commute patterns
 - Telecommute experience
 - Availability and attitudes about commute options
 - Recall / influence of commute ads
 - Awareness/use of regional commute services
- **Arlington analysis**
 - Examine Arlington results - 2001 and 2004
 - Compare Arlington results to regional trends (Region)
 - Compare Arlington residents (Arl Res) to commuters who work in Arlington (Arl Empl)

2004 Survey Demographics

- Home and work locations
- Age and ethnicity
- Sex and income



Home and Work Location – 2004

Home Location	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ DC	11%	0%	6%
▪ MD	45%	0%	<u>23%</u>
▪ Arlington	4%	100%	<u>22%</u>
▪ Other VA	40%	0%	49%

Work Location	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ DC	29%	<u>42%</u>	0%
▪ MD	33%	6%	0%
▪ Arlington	6%	<u>32%</u>	100%
▪ Other VA	31%	21%	0%

Age and Ethnicity – 2004

Age	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ Under 35	28%	<u>37%</u>	<u>22%</u>
▪ 35 – 44	28%	23%	26%
▪ 45 – 54	27%	23%	29%
▪ 54+	17%	17%	<u>23%</u>

Ethnicity	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ White	64%	<u>78%</u>	62%
▪ African-Amer	23%	<u>6%</u>	21%
▪ Hispanic	6%	8%	7%
▪ Asian	5%	6%	4%

Sex and Income – 2004

Sex	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ Female	55%	51%	45%
▪ Male	45%	49%	55%

Income	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ Under \$40K	14%	15%	13%
▪ \$40 – \$79.9K	31%	31%	<u>25%</u>
▪ \$80 – \$119.9	30%	32%	33%
▪ \$120K +	25%	24%	<u>30%</u>

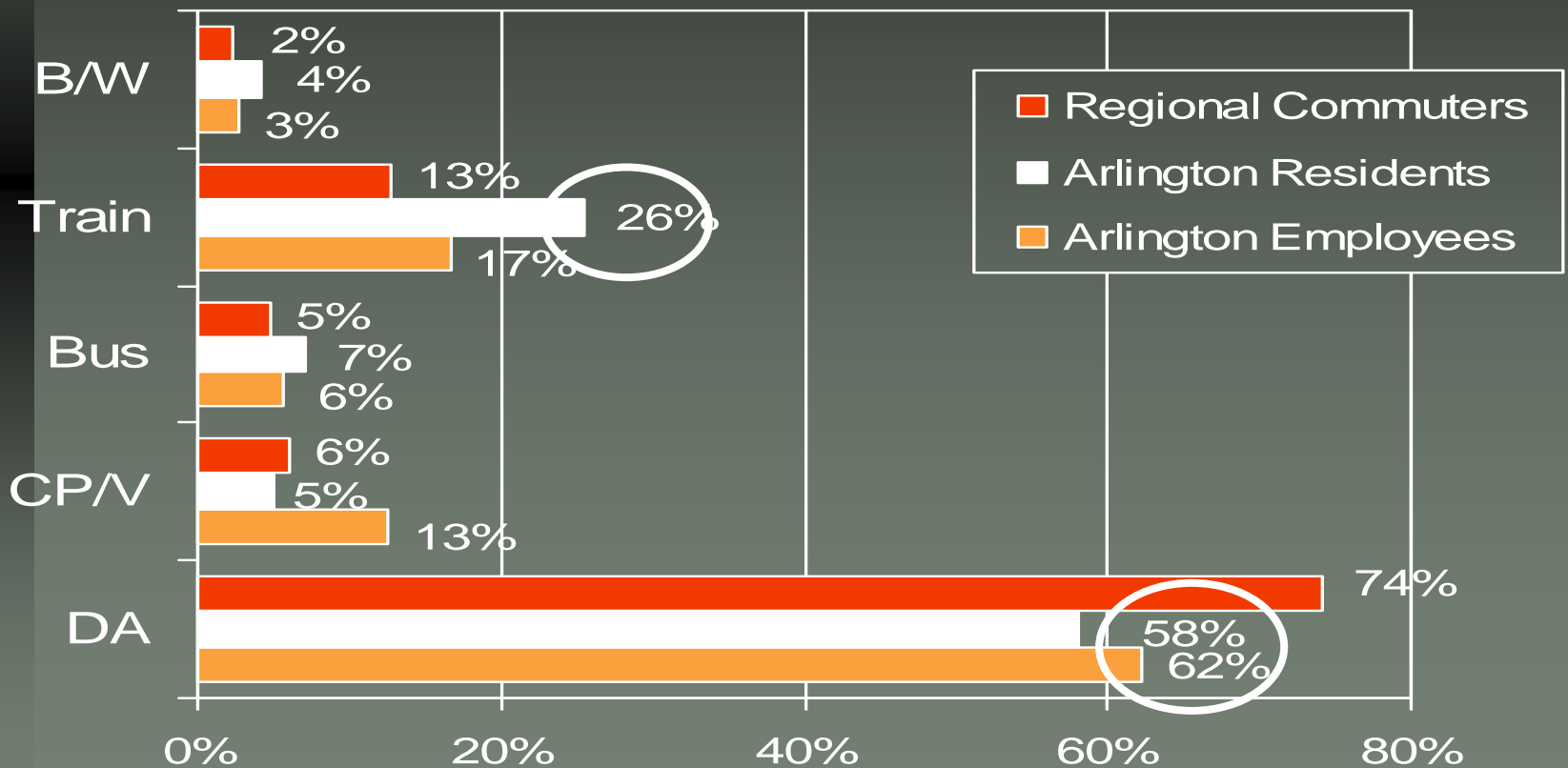
Commute Patterns – Arlington Co

- Current commute modes
- Use of other alt modes
- Commute length
- Access to alt modes



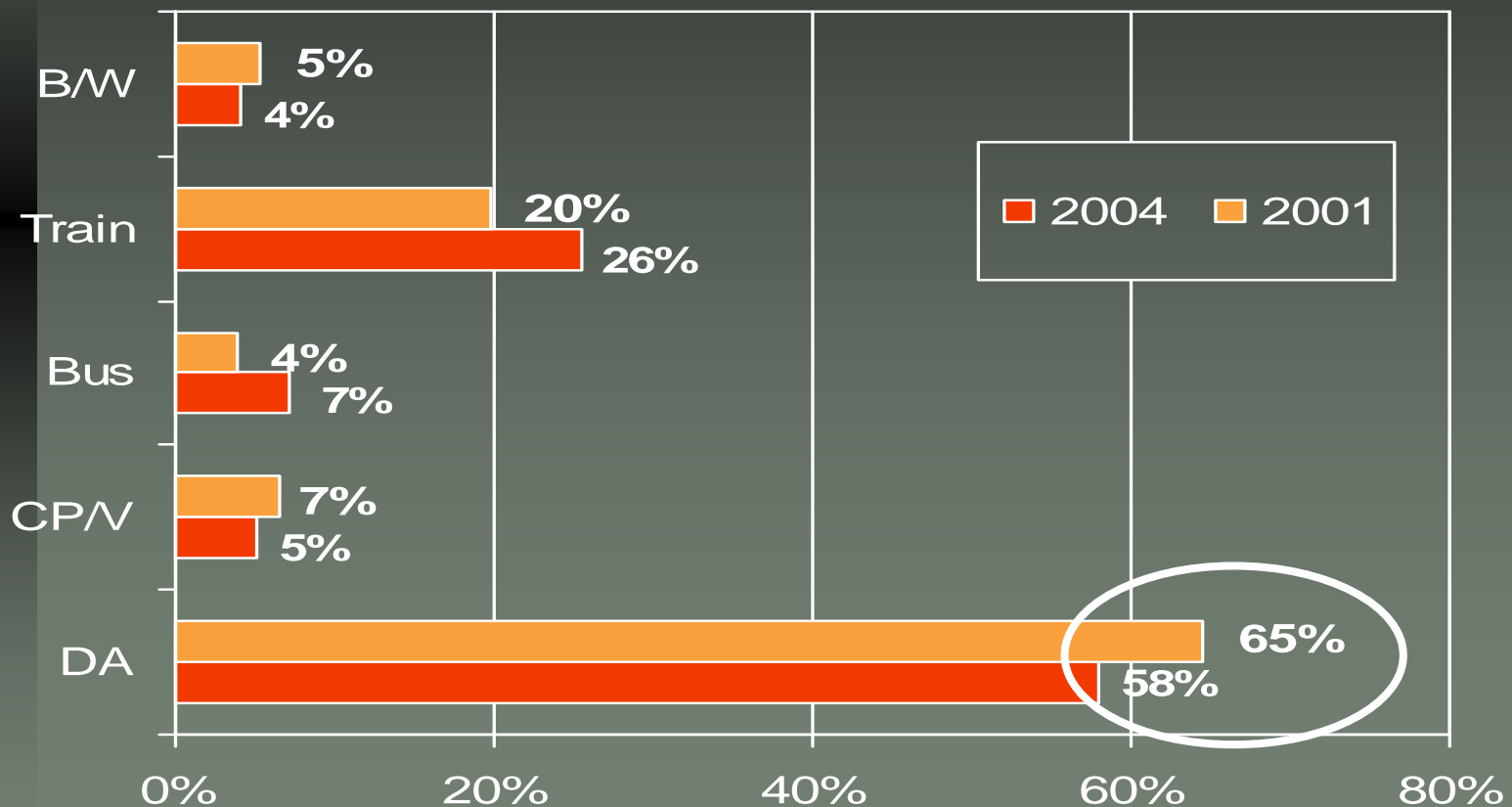
Mode 2004 – Arlington vs Region

Both Arlington residents (58%) and Arlington employees (62%) were much less likely to drive alone to work than were all regional commuters (74%).



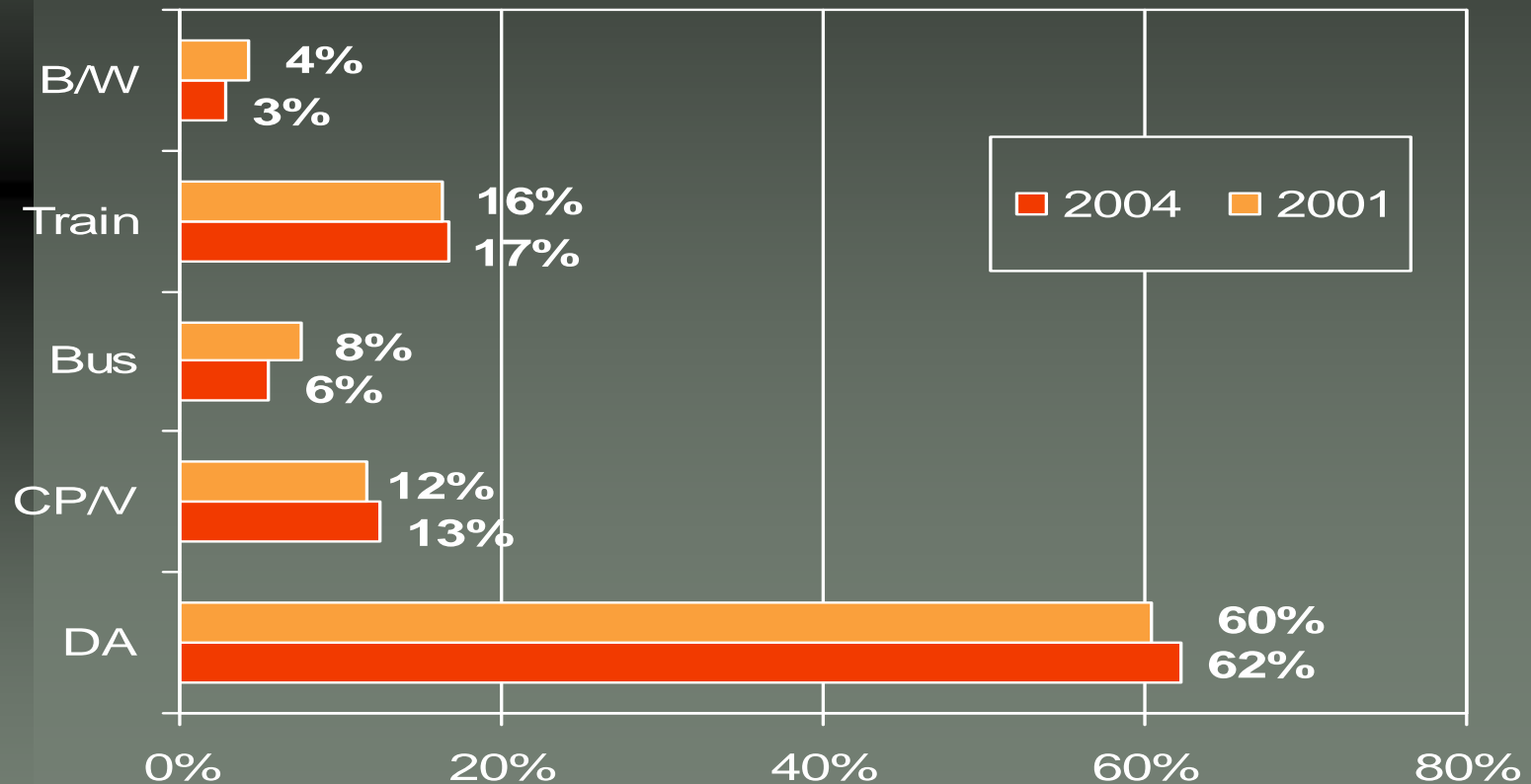
Mode 04 vs 01 – Arlington Residents

The drive alone share for Arlington residents appeared to drop from 2001 (65%) to 2004 (58%).



Mode 04 vs 01 – Arlington Employees

The drive alone rate for Arlington employees remained essentially unchanged between 2001 (60%) and 2004 (62%).



Use of Other Alternative Modes

- **Percent of commuters who used / tried a new alternative mode in the past two years was higher in Arlington than the region as a whole:**

- All regional commuters 22%
- Arlington residents 28%
- Arlington employees 31%

- **Modes tried**

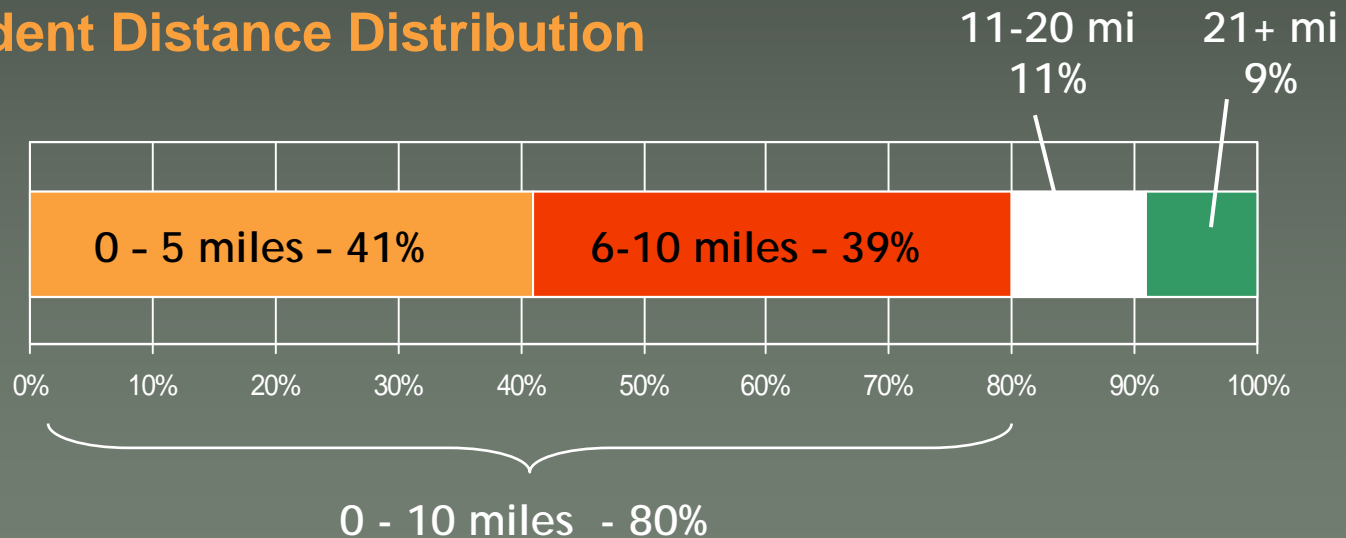
	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
■ Train	12%	<u>17%</u>	<u>20%</u>
■ Bus	7%	7%	9%
■ CP/VP	4%	3%	6%
■ Walk/bike	3%	<u>6%</u>	2%

Commute Length – Arl Residents

Four in ten (41%) Arlington residents travel 5 or fewer miles to work.

Eight in ten (80%) travel 10 miles or fewer miles.

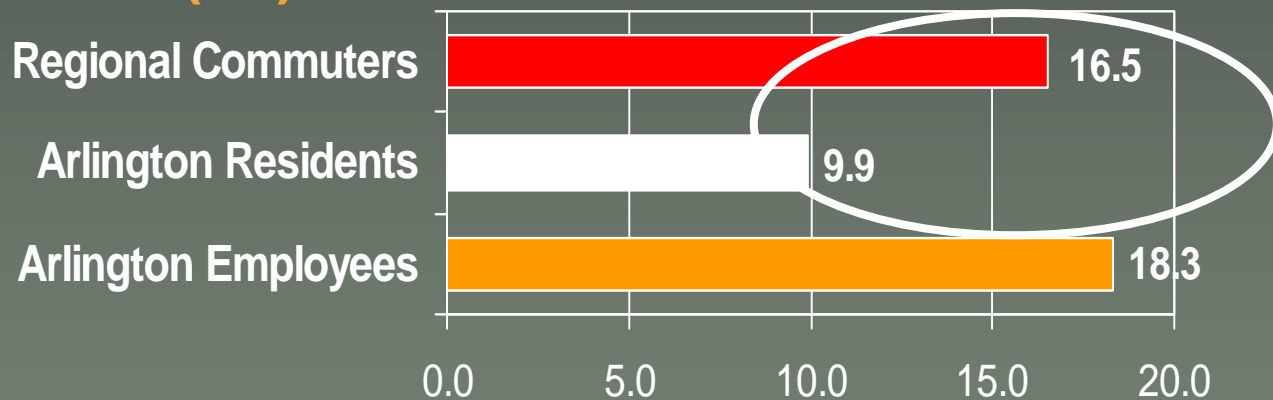
Resident Distance Distribution



Commute Distance

Arlington residents travel shorter distances to work (9.9 miles) than do other commuters in the region (16.5 miles). Arlington employees travel longer distances (18.3 miles) than the regional average.

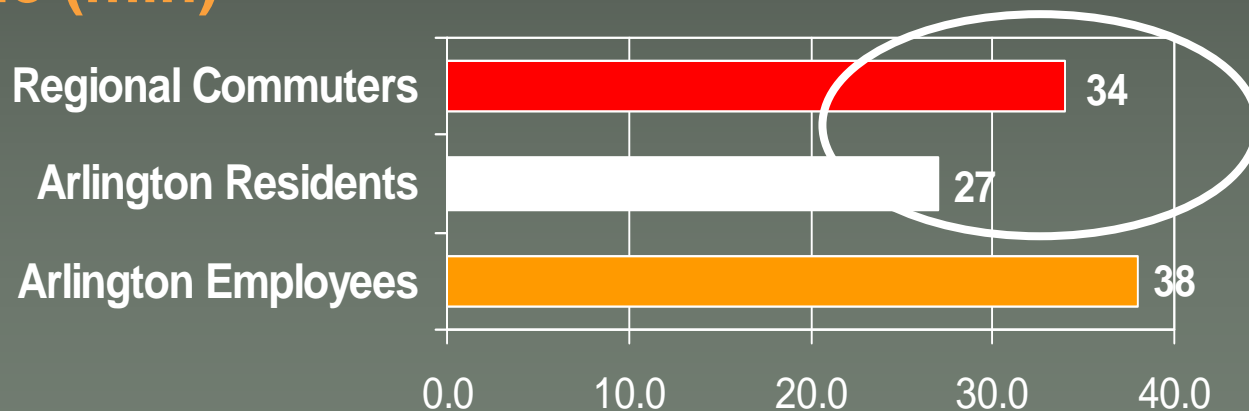
Distance (mi)



Commute Time

But residents do not have proportionately shorter commute times (28 min) than the regional average (34 min). This is primarily due to the large number of transit riders and walkers/bikers, who travel short distances, but take more time.

Time (min)



Access to Alt Modes

Arlington residents are more likely than other commuters in the region to walk to reach CP/VP meeting points and bus stops/train stations. Arlington employees are more likely to drive.

	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
■ Drive alone	29%	9%	<u>44%</u>
■ Picked up at home	15%	9%	15%
■ Bus	9%	8%	10%
■ Walk/bike	39%	<u>69%</u>	28%

Telecommute Experience

- Telecommuting basics
- Telecommute potential



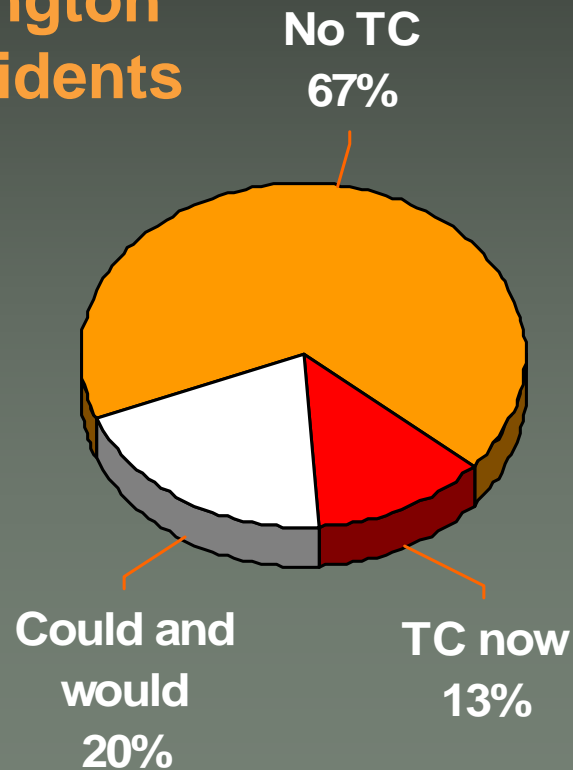
Teleworking in 2004

- **Regional Commuters**
 - 12.8% Telework
 - Average frequency = 1.3 d/wk
 - 49% started TW within past two years
- **Arlington Residents**
 - 12.6% Telework
 - Average frequency = 1.3 d/wk
 - 65% started TW within past two years
- **Arlington Employees**
 - 13.7% Telework
 - Average frequency = 1.4 d/wk
 - 54% started TW within past two years

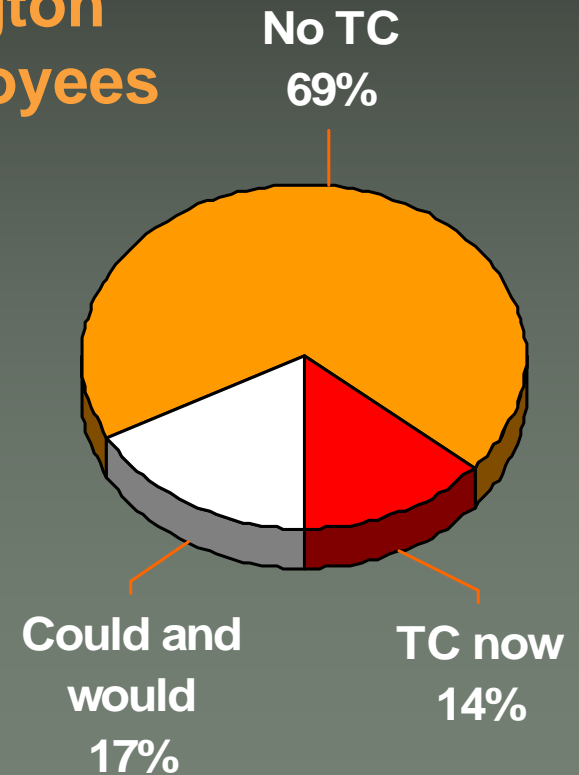
Telecommuting Potential

- Many non-telecommuters “could and would” TC if given the opportunity

Arlington Residents



Arlington Employees



Awareness/Attitudes – Options

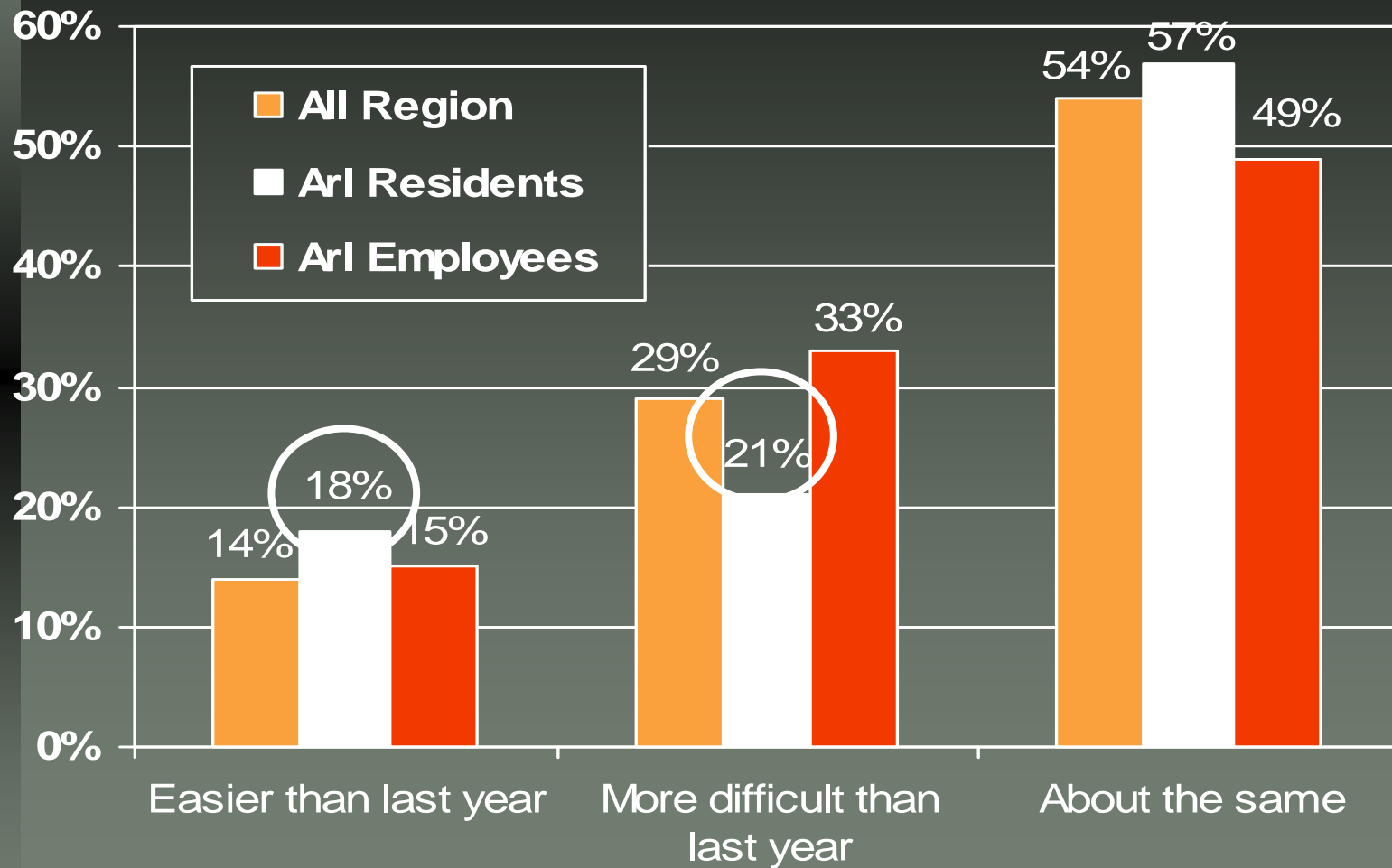
- Public transit
- HOV lanes
- Perception of commute ease



Availability of Transportation Services

- **Access to public transit**
 - 68% of regional commuters
 - 86% of Arlington residents
 - 75% of Arlington employees
- **Access to HOV lane on route to work**
 - 29% of regional commuters
 - 29% of Arlington residents
 - 50% of Arlington employees
- **21% of Arlington employees used HOV lanes on the way to work**

Perception of Commute Ease



Commute Advertising and Commute Assistance Services

- Advertising recall
- Messages recalled
- Awareness and use of regional services



Advertising Recall – 2004

- **Heard or saw commute ads in past 6 months**
 - 55% of regional commuters, same as 2001
 - 57% of Arlington residents, same as 2001
 - 63% of Arlington employees – **increase from 57% in 2001**
- **More likely to consider RS after hearing ads**
 - 18% of regional commuters – 28% in 2001
 - 18% of Arlington residents – 25% in 2001
 - 17% of Arlington employees – 24% in 2001

Message Recall – Arlington Residents

	<u>2004</u>	<u>2001</u>
■ Call for CP/VP info	<u>14%</u>	6%
■ Use bus/train	<u>11%</u>	0%
■ New buses/train coming	<u>9%</u>	4%
■ GRH	6%	2%
■ Commuter Connections	5%	4%
■ HOV lanes	<u>2%</u>	9%
■ Reduce traffic	3%	3%
■ Saves money	2%	6%
■ Saves time	<u>2%</u>	13%
■ Less stressful	2%	5%
■ Help environment	<1%	3%

Awareness of Commute Info Resource

- **Knew regional commute info number/website**
 - 46% of regional commuters – 33% in 2001
 - 45% of Arlington residents – 40% in 2001
 - 58% of Arlington employees – 42% in 2001
- **Used number/website last year**
 - 11% of regional commuters – 10% in 2001
 - 14% of Arlington residents – 10% in 2001
 - 10% of Arlington employees – 15% in 2001

Employer-Provided Services

- Employer demographics
- Incentive/support services offered and used
- Who offers services?
- Parking services offered
- Commute mode by services offered



Employer Size and Type - 2004

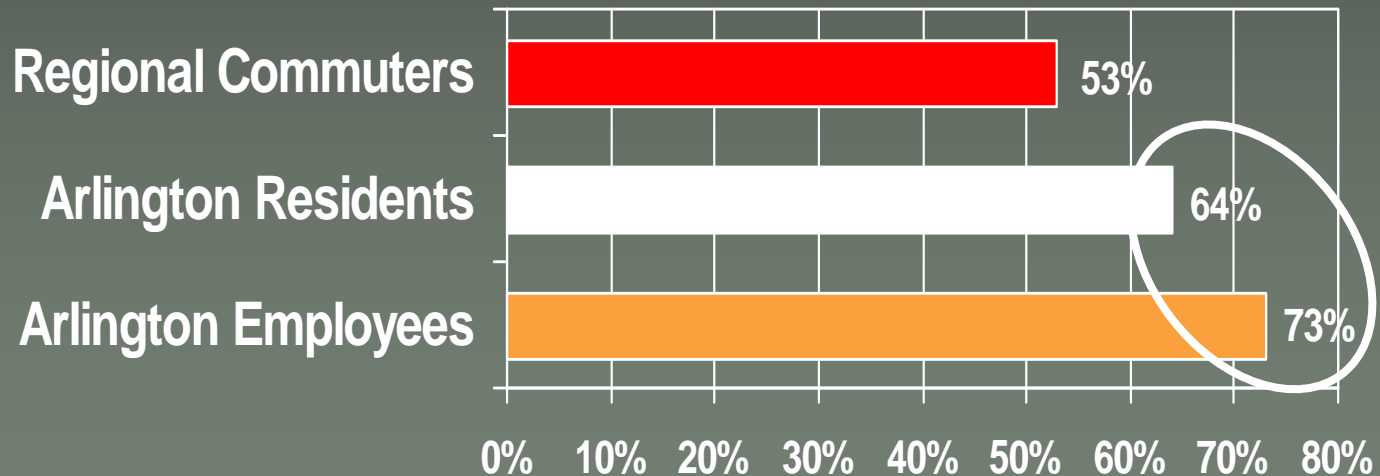
Size	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ 1 – 50	37%	33%	<u>24%</u>
▪ 51 – 100	12%	11%	11%
▪ 101 – 999	28%	27%	<u>34%</u>
▪ 1,000+	25%	29%	<u>31%</u>

Type	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ Federal	22%	24%	<u>37%</u>
▪ State/local	13%	9%	11%
▪ Non-profit	10%	14%	11%
▪ Private	49%	47%	<u>37%</u>
▪ Self-employed	7%	7%	5%

Employers Offer Commute Services

Two-thirds (64%) of Arlington residents and three-quarters (73%) of Arlington employees said their employers offered commute services, compared to only half (53%) of other commuters in the region.

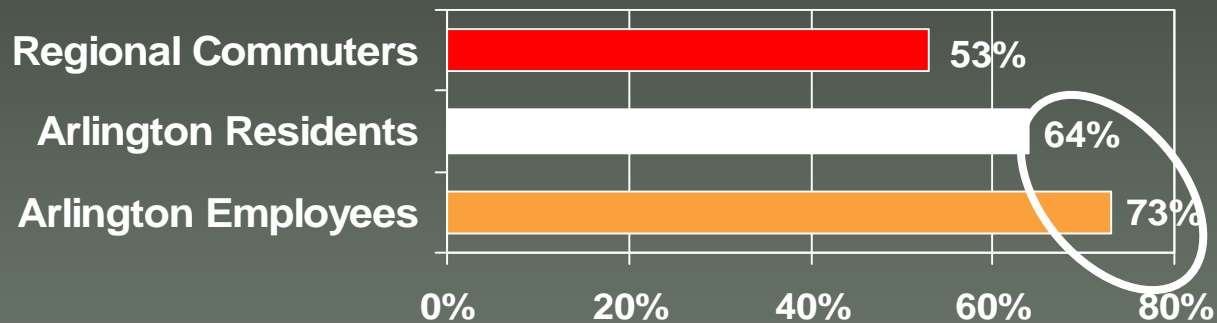
2004



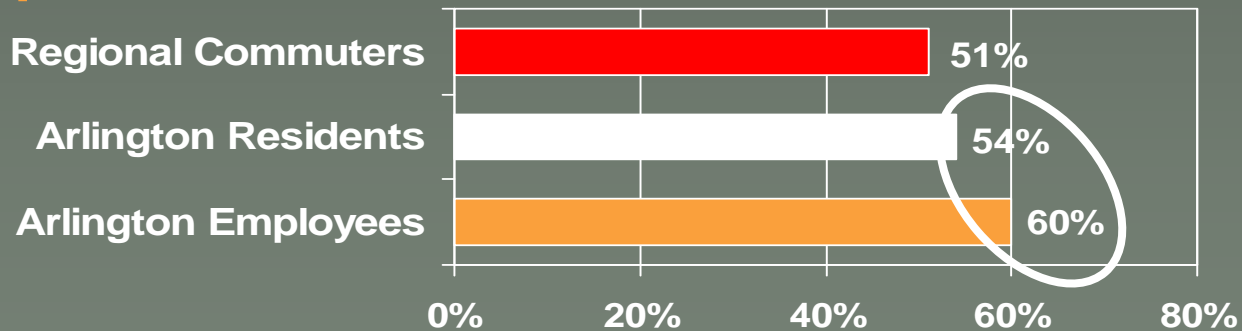
Employers Offer Commute Services

Both Arlington residents and Arlington employee reported greater availability of worksite commute services from 2001 to 2004. Regional availability remained unchanged.

2004



2001



Alt Mode Incentives or Support

Commuters who lived in Arlington and those who worked in Arlington had greater access to transit/VP subsidies, commute information and to bike/walk services than did the average employee in the region.

	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
▪ Any services	53%	<u>64%</u>	<u>73%</u>
▪ TR/VP subsidy	31%	<u>44%</u>	<u>59%</u>
▪ Commute info	22%	<u>27%</u>	<u>33%</u>
▪ Pref parking	16%	17%	<u>23%</u>
▪ B/W assistance	14%	<u>18%</u>	<u>21%</u>
▪ GRH	12%	10%	11%
▪ Carpool sub	4%	5%	6%

What Employers Offer Services?

All Regional Commuters

	<u>High Avail.</u>	<u>Low Avail.</u>
Type:	Federal (86%) Non-profit (61%)	State/local (43%) Private (42%)
Size:	1,000 (78%) 251-999 (65%)	<251 (38%)
Location:	DC (65%) <u>Arl (73%)</u>	MD (39%) Other VA (42%)

Parking at Worksites - 2004

Two-thirds of regional commuters had free parking at work, but only half of Arlington residents/employees had free parking.

	<u>Region</u>	<u>Arl Res</u>	<u>Arl Empl</u>
Free parking			
▪ On-site	66%	<u>49%</u>	<u>49%</u>
▪ Off-site	3%	3%	2%
Parking charge			
▪ Employee pays all	21%	33%	32%
▪ Employer pays part	6%	10%	11%

Commute Mode by Services Offered

The percentage of commuters who drive alone was lower at worksites where commute services are offered (63%) than where commute services are not available (81%)

Incentives / Support services

	<u>DA</u>	<u>CP/VP</u>	<u>Bus</u>	<u>Train</u>	<u>B/W</u>
Yes	<u>63%</u>	7%	5%	18%	2%
No	<u>81%</u>	4%	3%	6%	2%

Commuter Mode by Parking Offered

The drive alone rate was much lower at worksites that did not offer free parking (47%) than at worksites where parking was free (86%)

Free parking

	<u>DA</u>	<u>CP/VP</u>	<u>Bus</u>	<u>Train</u>	<u>B/W</u>
Yes	<u>86%</u>	4%	3%	5%	2%
No	<u>47%</u>	9%	9%	32%	3%

Conclusions – Commute Travel

- The share of trips made in alternative modes was higher for commuters who live and/or work in Arlington than for commuters region-wide
- The share of trips made by transit by Arlington residents increased from 2001 (24%) to 2004 (33%)
- Transit is more available for Arl residents (86%) and Arl employees (75%) than for commuters region-wide (68%)

Conclusions – Commute Travel (2)

- Arlington employees telecommute at slightly higher rates than do commuters region-wide
- Arlington residents and employees try new alt at higher rates than do regional commuters
- Arlington residents have shorter commutes than the average for the region; Arlington employees have longer trips than average
- Arlington residents are less likely to rate commute as “more difficult than last year” compared to other commuters

Conclusions – Employer TDM

- Arlington employers offer commute services at higher rates (73%) than do employers across the entire region (53%)
- Availability of services at Arlington worksites has increased btw 2001 and 2004 (60% to 73%)
- Only 51% of Arlington employees have free parking, compared with 69% of other workers