2007 State of the Commute Study: Arlington Perspective

The Factors of Success In Reducing Drive Alone Commuting in Arlington

Prepared By
Presentation Outline

• Report Focus & Information Sources

• Factors of Success in Reducing Drive Alone (DA) Commuting
  – Market Need: Arlington’s Market Profile
  – Ridesharing Infrastructure
  – Commuter Mindset: Motivators & Barriers to Rideshare
  – Employer Support & Involvement
  – Telework Opportunity
  – Societal Awareness and Support of Ridesharing

• Recommendations for Arlington County Commuter Services to help reduce drive alone commuting
Report Focus & Information Sources
Report Focus

1. Organize and share Arlington-related information collected through the Virginia portion of the MWCOG 2007 State of the Commute Study. Specifically:
   – Profile 2007 commute patterns for Arlington
   – Assess awareness of local Transportation Demand Management (TDM) services
   – Assess support for non-drive alone mode use and overall support for TDM activities
   – Highlight Arlington’s mode and TDM performance in relation to other Virginia regions and other jurisdictions in the Washington metropolitan region

2. Offer broad-based strategic recommendations on what will encourage Arlington residents and employees to reduce commuting by single-occupant vehicle (SOV).
Study Information Sources

• Information sources include:
  – Statewide telephone survey of employed residents in Virginia (600 in Arlington), District of Columbia, and five Maryland counties
    • Main survey of commuters in Northern Virginia, District of Columbia, and Maryland was done by MWCOG.
    • “Rest of VA” survey data were collected using the MWCOG method and questionnaire for commuters in other parts of Virginia
    • A sample of VA respondents from the COG survey were asked to answer additional questions in a brief callback interview.
  – Secondary rideshare and travel-related data collected for each Virginia region from multiple sources (e.g., U.S. Census, Virginia Employment Commission, VDOT & DRPT studies, etc.)
Notes on Survey Samples

• The VASOC includes data from two surveys:
  – **VASOC** – Residents of Virginia jurisdictions outside Northern Virginia; also included a callback of Northern Virginia respondents for a few questions not in the MWCOG SOC.

• The data for these two surveys were combined to provide a dataset for employed Virginia residents.

• Data also were obtained from MWCOG SOC for commuters who worked in Arlington and lived outside Virginia, in Washington DC or any of five neighboring Maryland counties (Calvert, Charles, Frederick, Montgomery, and Prince George’s).
MWCOG and VASOC Survey Areas

COG - Selected Maryland Counties and Washington, DC
COG and VASOC - Northern Virginia
VASOC - Rest of Virginia
Virginia Analysis Regions

• The combination of data from MWCOG SOC and VASOC enabled the definition of various “analysis regions,” defined by respondents' home / work locations:
  - **Arlington Residents** = Employed residents of Arlington County, regardless of work location
  - **Arlington Employees** = Commuters who worked in Arlington and worked in Virginia, in the District of Columbia, or in one of five Maryland counties in the Washington DC metro region
  - **Virginia Markets** = Employed residents of various areas of Virginia, regardless of work location
# VASOC Market Definition

<table>
<thead>
<tr>
<th>Urban Crescent Markets</th>
<th>Northern Virginia</th>
<th>Other Northern Virginia Commuter Service Markets</th>
<th>Other Virginia Commuter Service Markets</th>
<th>Commuter Feeder Markets</th>
<th>Non-served Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fredericksburg:</strong> Fredericksburg City; Caroline, Stafford, Spotsylvania, King George Counties</td>
<td><strong>Inner Beltway-Alexandria City</strong></td>
<td>Culpeper: Culpeper, Fauquier, Madison, Orange, Rappahannock Counties</td>
<td>Charlottesville: Charlottesville City; Albemarle, Fluvanna, Greene, Louisa, Nelson Counties</td>
<td>Feed Hampton, Richmond, Charlottesville, Roanoke, and Northern Virginia Consist of: Buena Vista, Danville, Emporia, Harrisonburg, Lexington, Lynchburg, Martinsville, Staunton, Waynesboro Cities; Amelia, Amherst, Augusta, Bath, Bedford, Bland, Buckingham, Carroll, Cumberland, Dinwiddie, Goochland, Greensville, Henry, Nottoway, Patrick, Pittsylvania, Prince George, Rockbridge, Rockingham, Sussex, Surry, Wythe Counties</td>
<td><strong>South/Southwest, North Central:</strong> Bristol, Galax, Norton Cities; Appomattox, Buchanan, Brunswick, Campbell, Charlotte, Dickenson, Grayson, Halifax, Highland, Lee, Lunenburg, Mecklenburg, Russell, Prince Edward, Scott, Smyth, Tazewell, Washington, Wise Counties</td>
</tr>
<tr>
<td>Hampton Roads: Chesapeake, Franklin, Hampton, Newport News, Norfolk, Poquoson, Portsmouth, Suffolk, Virginia Beach, Williamsburg Cities; Accomack, Isle of Wight, James City, Northampton, Southampton, York Counties</td>
<td><strong>Arlington County</strong></td>
<td>Front Royal - Northern Shenandoah: Winchester City; Clarke, Frederick, Page, Shenandoah, Warren Counties</td>
<td>RURAL MARKETS: <strong>Middle Peninsula:</strong> Essex, Gloucester, King &amp; Queen, King William, Mathews Middlesex Counties</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Richmond:</strong> Richmond, Petersburg, Colonial Heights, Hopewell Cities; Chesterfield, Hanover, Henrico, New Kent, Powhatan Counties</td>
<td><strong>Outer Beltway-Fairfax:</strong> Falls Church, Fairfax Cities; Fairfax County</td>
<td>Prince William: Manassas, Manassas Park Cities; Prince William County</td>
<td><strong>Northern Neck:</strong> Westmoreland, Northumberland, Lancaster, Richmond Counties</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Richmond:</strong> Richmond, Petersburg, Colonial Heights, Hopewell Cities; Chesterfield, Hanover, Henrico, New Kent, Powhatan Counties</td>
<td><strong>Loudoun County</strong></td>
<td>Rapidan - Northern Shenandoah:</td>
<td>Roanoke Valley – Alleghany Region: Radford, Roanoke, Salem, Clifton Forge, Covington Cities; Alleghany, Botetourt, Craig, Floyd, Franklin, Giles, Montgomery, Pulaski, Roanoke Counties</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>South/Southwest, North Central:</strong> Bristol, Galax, Norton Cities; Appomattox, Buchanan, Brunswick, Campbell, Charlotte, Dickenson, Grayson, Halifax, Highland, Lee, Lunenburg, Mecklenburg, Russell, Prince Edward, Scott, Smyth, Tazewell, Washington, Wise Counties</td>
<td><strong>Fairfax County</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Metro DC Analysis Areas

• Data also were compiled for the 11 jurisdiction “Metro DC” region and for each jurisdiction in the region:
  – **Metro DC** – Employed residents of Northern Virginia, District of Columbia, and 5 suburban Maryland counties
  – **Virginia** – Alexandria City, and Arlington, Fairfax, Loudoun, and Prince William counties
  – **District of Columbia**
  – **Maryland** – Calvert, Charles, Frederick, Montgomery, and Prince George’s counties

• Data for residents of these areas are reported to show Arlington’s results in comparison to its neighbors.

• The analysis of employer services also examined data for commuters who **worked** in these jurisdictions compared to commuters who worked in Arlington.
Key Report Perspective

The 2007 Virginia State of the Commute Study was designed as a comprehensive “benchmark” study. It is the intent of DRPT to conduct subsequent waves of this study every three years to track commute mode split and rideshare-related issues, noting important changes from period to period. This long-term perspective should be kept in mind when viewing the 2007 data – the benchmark wave - as presented in this document. The VASOC also was intended to monitor performance, guide DRPT to make plans more effective, and assess progress on different ridesharing organizations’ objectives.

Episodic events that affect travel mode choice, such as the dramatic escalation in gas prices (summer 2008), should be kept in mind when reviewing the Virginia State of the Commute Study as possible forces affecting long-term trends.
Factors of Success in Reducing SOV Commuting
Primary Commute Mode
Arlington Has the Lowest Resident Drive Alone Primary Commute Rate of All Virginia Regions

Q15. Now thinking about LAST week, how did you get to work each day. ...

Region Residents
Excludes self-employed and Work-at-home

Arlington
n = 561
Alexandria
n = 560
Fairfax
n = 543
Loudoun
n = 561
Prince William
n = 573
Charlottesville
n = 263
Fredericksburg
n = 568
Richmond
n = 603
Hampton Roads
n = 585
NoVA Service
n = 567
Rural Markets
n = 632
Feeder
n = 283
Non-served
n = 289

PRIMARY COMMUTE MODE = Drive alone

0% 20% 40% 60% 80% 100%

Primary Commute Mode -- % Drive Alone

Arlington 54%
Alexandria 60%
Fairfax 70%
Fredericksburg 75%
Prince William 76%
VA Statewide 83%
Loudoun 84%
Charlottesville 86%
NoVA Service Markets 86%
Richmond 88%
Hampton Roads 90%
Rural Markets 90%
Feeder 89%
Non-served 91%
Within the Metro DC Region, Arlington is Second only to the District of Columbia in its Low Resident Drive Alone Rate.

Q15. Now thinking about LAST week, how did you get to work each day. ...

Data from MWCOG SOC survey only.
Only 54% of Arlington Residents Use Driving Alone as their Primary Commute Mode; Three in Ten Ride Transit

VA Statewide Averages
Drive alone 83%
Carpool/Vanpool 7%
Bus 2%
Train 3%
Bike/walk 1%
Telework 3%

46% of Arlington residents use a non-SOV mode as their primary commute mode

Q15. Now thinking about LAST week, how did you get to work each day. ...
Within the Metro DC Region, Arlington Residents have the Second Highest Share of **Transit Use**

**Q15.** Now thinking about LAST week, how did you get to work each day. ...

Data from MWCOG SOC survey only

*Region Residents Excludes self-employed and Work-at-home*

Arlington 
n = 561
Alexandria 
n = 560
Calvert 
n = 551
Charles 
n = 575
District of Columbia 
n = 538
Fairfax 
n = 543
Frederick 
n = 563
Loudoun 
n = 561
Montgomery 
n = 545
Prince George’s 
n = 568
Prince William 
n = 573
Metro DC 
n = 6,168

Primary Commute Mode -- % Transit

- **District of Columbia**: 36%
- **Arlington**: 31%
- **Alexandria City, VA**: 27%
- **Montgomery Co, MD**: 20%
- **Metro DC**: 18%
- **Prince George’s Co, MD**: 18%
- **Fairfax Co**: 14%
- **Charles Co**: 9%
- **Prince William Co, VA**: 8%
- **Frederick Co, MD**: 5%
- **Calvert Co, MD**: 5%
- **Loudoun Co, VA**: 3%
Commuters who work in Arlington are more likely to carpool and less likely to ride the train than those who live in Arlington.

Q15. Now thinking about LAST week, how did you get to work each day...
Percent of Weekly Trips Made
Arlington Has the Lowest Resident Share of Weekly Drive Alone Trips of All VA Regions Studied

Q15. Now thinking about LAST week, how did you get to work each day. ...
Within the Metro DC Region, Arlington is Second only to District of Columbia in the Low Share of Weekly Trips Made by Driving Alone

% OF WEEKLY TRIPS MADE = Drive alone

<table>
<thead>
<tr>
<th>Region</th>
<th>% Drive Alone</th>
</tr>
</thead>
<tbody>
<tr>
<td>District of Columbia</td>
<td>45%</td>
</tr>
<tr>
<td>Arlington</td>
<td>52%</td>
</tr>
<tr>
<td>Alexandria City, VA</td>
<td>59%</td>
</tr>
<tr>
<td>Fairfax Co VA</td>
<td>68%</td>
</tr>
<tr>
<td>Montgomery Co, MD</td>
<td>68%</td>
</tr>
<tr>
<td>Metro DC</td>
<td>68%</td>
</tr>
<tr>
<td>Prince George's Co, MD</td>
<td>70%</td>
</tr>
<tr>
<td>Prince William Co, VA</td>
<td>74%</td>
</tr>
<tr>
<td>Charles Co, MD</td>
<td>79%</td>
</tr>
<tr>
<td>Frederick Co, MD</td>
<td>79%</td>
</tr>
<tr>
<td>Loudoun Co, VA</td>
<td>81%</td>
</tr>
<tr>
<td>Calvert Co, MD</td>
<td>82%</td>
</tr>
</tbody>
</table>

Q15. Now thinking about LAST week, how did you get to work each day. ...
Drive Alone Accounts for Just 52% of Arlington Residents’ Weekly Commute Trips

Drive alone accounts for 52% of Arlington residents' weekly commute trips. 48% of Arlington residents' commute trips are made using a non-SOV mode.

VA Statewide Averages
- Drive alone: 83%
- Carpool/Vanpool: 7%
- Bus: 2%
- Train: 3%
- Bike/Walk: 1%
- Telework: 4%

Arlington Residents
n = 561
Excludes self-employed working at home full-time

Q15. Now thinking about LAST week, how did you get to work each day. ...
Commuters Who Work in Arlington Are More Likely to Carpool and Less Likely to Ride the Train than Those Who Live in Arlington

- Drive alone: 57%
- Train (Metrorail): 17%
- Carpool/Vanpool: 14%
- Bus: 5%
- Bike/Walk: 2%
- Telework/CWS: 4%

43% of Arlington employees' weekly commute trips are made using non-SOV modes

Q15. Now thinking about LAST week, how did you get to work each day. ...
Modes Used at Least One Day a Week
Arlington Has the Lowest Percentage of Residents Who Ever Drive Alone of All VA Regions Studied

Q15. Now thinking about LAST week, how did you get to work each day. ...
Within the Metro DC Region, Arlington is Second only to District of Columbia in the Low Share of Residents who Ever Drive Alone

Q15. Now thinking about LAST week, how did you get to work each day. ...
Nearly Six in Ten Arlington Residents Drive Alone at Least One Day a Week – But More Than a Quarter Take Metrorail

Q15. Now thinking about LAST week, how did you get to work each day. ...

VA Statewide Averages
Drive alone 85%
Carpool/Vanpool 8%
Bus 2%
Train 4%
Bike/walk 2%
Telework 10%

Arlington Residents
n = 561
Excludes self-employed working at home full-time
Commuters Who **Work** in Arlington Are More Likely to Carpool and Less Likely to Ride Metrorail than are Those Who **Live** in Arlington

<table>
<thead>
<tr>
<th>Mode</th>
<th>Residents</th>
<th>Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive alone</td>
<td>58%</td>
<td>63%</td>
</tr>
<tr>
<td>Train (Metrorail)</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>Carpool/Vanpool</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Telework</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Bus</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Bike/walk</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Q15. Now thinking about LAST week, how did you get to work each day...
“Factors of Success” In Growing Non-Drive Alone Commute Alternatives

Reduce Drive Alone Commuting

TDM industry research and market experience across Virginia has highlighted a number of factors that directly or indirectly contribute to greater use of non-drive alone “alternative modes” resulting in the reduction of drive alone commuting.* This report is organized around these “Factors of Success.”

*Reduction of drive alone commuting in the case of a growing market is the decrease in the growth rate of drive alone commuting relative to other commute modes.
“Factors of Success” in Reducing Drive Alone Commuting

Goal: Reducing Drive Alone Commuting

Market Need

Societal Awareness & Support

Rideshare Infrastructure

Telework Opportunity

Commuter Mindset

Employer Support & Involvement
“Factors of Success” in Reducing Drive Alone Commuting

Goal: Reducing Drive Alone Commuting

- Market Need
- Societal Awareness & Support
- Rideshare Infrastructure
- Telework Opportunity
- Commuter Mindset
- Employer Support & Involvement
People are motivated by needs and desires (wants). When it comes to commuting, commuters choose modes to save time or money or reduce stress and frustration. These basic needs may vary by market as they are tied to commute time, commute distances, commute stress due to congestion, and socio-economic factors.

How does Arlington compare to markets across Virginia?
Arlington County’s Population is Smaller than that of Most Regions Surveyed

Source: 2000 U.S. Census
But Arlington’s Population Density is Among the Highest

Source: 2000 U.S. Census
Arlington Has Moderate to Low Population Growth Compared to Other Virginia Areas

Arlington is Smaller than Most Virginia Regions in the Number of Business Firms

Source: Total Number of Firms, 2002 - U.S. Census
Q113. In total, how many motor vehicles, in working condition, including automobiles, trucks, vans, and highway motorcycles are owned or leased by members of your household?
**Average Commute Distance One-Way for Arlington Residents Is 9 Miles**

<table>
<thead>
<tr>
<th>Distance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 5 mi</td>
<td>29%</td>
</tr>
<tr>
<td>5-9 mi</td>
<td>40%</td>
</tr>
<tr>
<td>10-19 mi</td>
<td>19%</td>
</tr>
<tr>
<td>20-29 mi</td>
<td>8%</td>
</tr>
<tr>
<td>30+ mi</td>
<td>5%</td>
</tr>
</tbody>
</table>

- **69%** under 10 miles

**Arlington residents who drive alone to work travel farther (10 miles) than do residents who use alternative modes for their commutes (8 miles)**

Q16. / Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?
Arlington Residents Travel the Fewest Miles to Work of All Virginia Region Residents

Q16./Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?

Average commute:
- Arlington = 9 miles
- VA Statewide = 17 miles
Within the Metro DC Region, Arlington and DC Residents Travel the Shortest Distance to Work

Q16./ Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?

Average commute:
Arlington = 9 miles
Washington metro = 16 miles

Data from MWCOG SOC survey only

Region Residents
Excludes self-employed and Work-at-home

Alexandria
n = 501
Arlington
n = 484
Calvert
n = 527
Charles
n = 545
District of Columbia
n = 423
Fairfax
n = 479
Frederick
n = 522
Loudoun
n = 514
Montgomery
n = 473
Prince George's
n = 467
Prince William
n = 530
Metro DC
n = 5,465
Average Commute Time One-Way Is 28 Minutes for Arlington Residents

Time – Average 28 minutes

<table>
<thead>
<tr>
<th>Time Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 min or less</td>
<td>15%</td>
</tr>
<tr>
<td>11-20 min</td>
<td>26%</td>
</tr>
<tr>
<td>21-30 min</td>
<td>27%</td>
</tr>
<tr>
<td>31-45 min</td>
<td>20%</td>
</tr>
<tr>
<td>46+ min</td>
<td>10%</td>
</tr>
</tbody>
</table>

41% 20 minutes or less

The average travel time for Arlington residents who drive alone to work is shorter (25 minutes) than for residents who use alternative modes for their commutes (32 minutes)

Q16. / Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?
Arlington Residents’ Commute Travel Time is About Equal to the VA Statewide Average

Q16. / Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?
Arlington Residents Travel Fewer Minutes to Work than Do Average Metro DC Region Commuters

Q16./Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?

Region Residents
Excludes self-employed and Work-at-home

<table>
<thead>
<tr>
<th>Region</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>544</td>
</tr>
<tr>
<td>Arlington</td>
<td>545</td>
</tr>
<tr>
<td>Calvert</td>
<td>538</td>
</tr>
<tr>
<td>Charles</td>
<td>569</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>523</td>
</tr>
<tr>
<td>Fairfax</td>
<td>513</td>
</tr>
<tr>
<td>Frederick</td>
<td>541</td>
</tr>
<tr>
<td>Loudoun</td>
<td>527</td>
</tr>
<tr>
<td>Montgomery</td>
<td>528</td>
</tr>
<tr>
<td>Prince George's</td>
<td>554</td>
</tr>
<tr>
<td>Prince William</td>
<td>559</td>
</tr>
<tr>
<td>Metro DC</td>
<td>5,941</td>
</tr>
</tbody>
</table>

Data from MWCOG SOC survey only

Average One-way Commute Length in Minutes

Average commute:
Arlington = 29 minutes
Washington metro = 35 minutes
But in terms of minutes per mile, Arlington residents have the slowest commute; this reflects Arlington’s high use of transit for commuting.

The time it takes to travel one mile can be viewed as a measure of congestion.

Arlington residents who drive alone to work average 2.5 minutes per mile. Residents who use alternate modes average 3.9 minutes per mile.

Q16. / Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?

<table>
<thead>
<tr>
<th>Location</th>
<th>Average One-way Commute Time – Minutes per Mile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlington</td>
<td>3.0</td>
</tr>
<tr>
<td>Alexandria</td>
<td>2.6</td>
</tr>
<tr>
<td>Fairfax</td>
<td>2.4</td>
</tr>
<tr>
<td>Prince William</td>
<td>2.0</td>
</tr>
<tr>
<td>Loudoun</td>
<td>1.8</td>
</tr>
<tr>
<td>VA Statewide</td>
<td>1.7</td>
</tr>
<tr>
<td>Hampton Roads</td>
<td>1.6</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>1.5</td>
</tr>
<tr>
<td>Richmond</td>
<td>1.4</td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>1.4</td>
</tr>
<tr>
<td>Rural Markets</td>
<td>1.4</td>
</tr>
<tr>
<td>NoVA Service Markets</td>
<td>1.3</td>
</tr>
<tr>
<td>Feeder</td>
<td>1.4</td>
</tr>
<tr>
<td>Non-served</td>
<td>1.3</td>
</tr>
</tbody>
</table>

Average commute speed:
- **Arlington** = 3.0 min/mile; about 20 mph average speed
- **VA Statewide** = 1.7 min/mile; about 35 mph average speed
Average Commute Distance One-Way for Those Who Work in Arlington Is 21 Miles; Average Commute Time is 42 Minutes

Distance – Average 21 miles

<table>
<thead>
<tr>
<th>Mile Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 5 mi</td>
<td>14%</td>
</tr>
<tr>
<td>5-9 mi</td>
<td>22%</td>
</tr>
<tr>
<td>10-19 mi</td>
<td>22%</td>
</tr>
<tr>
<td>20-29 mi</td>
<td>19%</td>
</tr>
<tr>
<td>30+ mi</td>
<td>22%</td>
</tr>
</tbody>
</table>

36% under 10 miles

Time – Average 42 minutes

<table>
<thead>
<tr>
<th>Minute Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 min or less</td>
<td>11%</td>
</tr>
<tr>
<td>11-20 min</td>
<td>18%</td>
</tr>
<tr>
<td>21-30 min</td>
<td>17%</td>
</tr>
<tr>
<td>31-45 min</td>
<td>24%</td>
</tr>
<tr>
<td>46+ min</td>
<td>31%</td>
</tr>
</tbody>
</table>

29% 20 minutes or less

**Average commute:**

- **Arlington workers** = 2.0 min/mile; about 30 mph average speed
- **VA Statewide** = 1.7 min/mile; about 35 mph average speed

Q16. / Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?
Key Findings:

Arlington’s population is relatively small for Virginia, but its population density is the second highest. Arlington has the highest number of households with no cars and the second lowest number of two-car households.

Many Arlington resident commuters work outside the County and, although they have a shorter distance to commute, the average time it takes for them to commute is near the VA statewide average. This results in residents having the slowest commute among Virginia regions.

Residents who drive alone have faster commutes than those who use alternative modes. Those who work in Arlington tend to have longer commutes averaging 21 miles or 42 minutes.
Strategic Implication:

In such a densely populated area, a low drive-alone rate is paramount. It will be important for Arlington to maintain and even increase use of alternative modes.

The drive alone rate is slightly higher for those who work in Arlington, due in large part to more limited transportation options in the areas where they live.
Goal: Reducing Drive Alone Commuting

Factors of Success:
- Societal Awareness & Support
- Telework Opportunity
- Market Need
- Rideshare Infrastructure
- Commuter Mindset
- Employer Support & Involvement
Rideshare infrastructure is comprised of both physical “hardware” and information and support “software.” A critical mass of both infrastructure components are necessary to make non-drive alone alternative modes viable options for commuters and a recognizable and vital part of a region’s transportation system.

**Hardware**
- Infrastructure such as HOV lanes, Park & Ride Lots, and Public Transit

**Software**
- Transportation Demand Management Services – marketing, ridematching, employer services, etc.
Transit Service
93% of Arlington resident commuters said some type of transit operates in their home area (this reflects respondents’ perception, not actual availability).

- 63% said both bus and train operated
- 23% mentioned only bus
- 6% said only train service operated

- Transit companies mentioned
  - 69% Metrobus
  - 66% Metrorail
  - 15% Arlington Transit / ART
  - 3% Alexandria DASH
  - 3% VRE

Q44. Regardless of whether or not you use them, what train or bus companies provide service in the area where you live?
90% of Arlington employees said that some type of train or bus operated in their **work area**

- 65% Metrorail/Subway
- 62% Metrobus
- 14% VRE
- 7% Fairfax Connector
- 5% ART
- 4% Alexandria DASH
- 4% Omni Ride

Q44c. What train or bus companies provide service in the area where you work?
Arlington Has the Second Highest Percentage of All VA Resident Commuters Reporting that Bus or Train Is Available in their Home Area

Q44. Regardless of whether or not you use them, what train or bus companies provide service in the area where you live?
Arlington Resident Commuters Had Greater Access to Home Area Transit than did Most Metro DC Region Commuters

Q44. Regardless of whether or not you use them, what train or bus companies provide service in the area where you live?
92% of Arlington Resident Commuters Reported Living Within One Mile of a Bus Stop

92% live less than one mile from a bus stop.

Q44a. About how far from your home is the nearest bus stop?

Average distance in Arlington
½ a mile

Arlington Residents
n = 507
The Share of Commuters Who Live Less than a Mile from a **Bus Stop** is the Highest in Arlington Among the Virginia Markets Surveyed

### Region Residents

<table>
<thead>
<tr>
<th>Region</th>
<th>Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>VA Statewide</td>
<td>n = 4,912</td>
</tr>
<tr>
<td>Alexandria</td>
<td>n = 514</td>
</tr>
<tr>
<td>Arlington</td>
<td>n = 507</td>
</tr>
<tr>
<td>Fairfax</td>
<td>n = 465</td>
</tr>
<tr>
<td>Loudoun</td>
<td>n = 371</td>
</tr>
<tr>
<td>Prince William</td>
<td>n = 442</td>
</tr>
<tr>
<td>NoVA Service Markets</td>
<td>n = 352</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>n = 207</td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>n = 377</td>
</tr>
<tr>
<td>Hampton Roads</td>
<td>n = 447</td>
</tr>
<tr>
<td>Richmond</td>
<td>n = 425</td>
</tr>
<tr>
<td>Loudoun</td>
<td>n = 423</td>
</tr>
<tr>
<td>Rural Markets</td>
<td>n = 423</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>n = 207</td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>n = 377</td>
</tr>
<tr>
<td>NoVA Service Markets</td>
<td>n = 352</td>
</tr>
<tr>
<td>Feeder</td>
<td>n = 197</td>
</tr>
<tr>
<td>Non-served</td>
<td>n = 185</td>
</tr>
</tbody>
</table>

Q44a. About how far from your home is the nearest bus stop?
Arlington Residents have Excellent Bus Access Compared to Most Metro DC Commuters

Q44a. About how far from your home is the nearest bus stop?

Percentages indicate the share of residents who said they lived less than a mile from the nearest bus stop.

Data from MWCOG survey only
Arlington Resident Commuters Have the Second Highest Bus Use, But Still Only 7% of Them Ride the Bus at Least Once a Week

Percentages indicate those who use the bus one or more times a week

Q15. Now thinking about LAST week, how did you get to work each day ...
89% of Arlington Resident Commuters Reported Living Within One Mile of a Train Station

Distance to nearest bus stop

- Less than a mile: 43%
- 1-3.9 miles: 46%
- 4-5.9 miles: 7%
- 6-10.9 miles: 3%
- 11 miles or more: 1%

Q44. How far from your home is the nearest train station?

Arlington Residents
n = 490

Average distance in Arlington
2 miles

89% live less than one mile from a train station

Southeastern Institute of Research
The Share of Arlington Resident Commuters Who Live Less than 1 Mile from the Nearest Train Stop is the Highest in Virginia

<table>
<thead>
<tr>
<th>Region Residents</th>
<th>Arlington</th>
<th>Alexandria</th>
<th>Fairfax</th>
<th>Prince William</th>
<th>Fredericksburg</th>
<th>Loudoun</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>503</td>
<td>53%</td>
<td>70%</td>
<td>63%</td>
<td>57%</td>
<td>96%</td>
</tr>
<tr>
<td>Arlington</td>
<td>490</td>
<td>43%</td>
<td>70%</td>
<td>56%</td>
<td>28%</td>
<td>96%</td>
</tr>
<tr>
<td>Fairfax</td>
<td>442</td>
<td>7%</td>
<td>56%</td>
<td>51%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Prince William</td>
<td>474</td>
<td>3%</td>
<td>48%</td>
<td>51%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>187</td>
<td>2%</td>
<td>26%</td>
<td>28%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Loudoun</td>
<td>384</td>
<td>1%</td>
<td>8%</td>
<td>28%</td>
<td>26%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Q44. How far from your home is the nearest train station?
The Share of Arlington Resident Commuters Who Live Less than 1 Mile from a Train Station is Equal to that for Washington DC

Percentages indicate those who said they lived less than a mile or between 1 and 6 miles from the nearest train stop.

Region Residents

Alexandria n = 503
Arlington n = 490
Charles n = 377
Calvert n = 428
District of Columbia n = 497
Fairfax n = 442
Frederick n = 452
Loudoun n = 384
Montgomery n = 484
Prince George’s n = 483
Prince William n = 474
Metro DC n = 5,014

MWCOG survey

Q44. How far from your home is the nearest train station?
Arlington Resident Commuters Have the Highest Train Use in Virginia and Nearly as High as for Residents of Washington DC

Percentages indicate residents who use Metrorail or another train (MARC, VRE, AMTRAK) one or more times a week.

VASOC Q15. Now thinking about LAST week, how did you get to work each day ...

Alexandria $n = 599$
Arlington $n = 600$
Fairfax $n = 600$
Fredericksburg $n = 604$
Prince William $n = 600$
Loudoun $n = 603$
Key Finding:
Almost all Arlington Commuters have access to train or bus service in their home and work areas. Their access to transit is as high as for commuters in the District of Columbia. Their use of transit services is higher than any other area in Virginia. Residents were more likely to mention having access to Metrobus than ART.

Strategic Implication:
A study of Arlington Residents who have the ability to, but do not ride the bus is necessary to determine barriers of use, especially when coupled with the Rider Study recently done in Arlington.
Also look for ways to increase awareness of the ART system, promoting its ease of use.
Guaranteed Ride Home
Guaranteed Ride Home Removes a Common Barrier to Ridesharing – Fear of Being Stranded without a Car

28% of Arlington resident commuters said they knew of a regional GRH service

4% said they had registered or used any GRH service

89% of those registering/using believed the program was provided by their employer and 8% said Commuter Connections sponsored the service.

Q102. Do you know if there is a regional GRH program available in the event of unexpected emergencies and unscheduled overtime for commuters who rideshare or use public transportation? Q103. In the past 2 years, have you registered for or used any GRH service? Q104. Who sponsored or offered the service?
Arlington Residents Have Higher Awareness of a Regional GRH Program than do Residents in Most Other Surveyed Areas

Q102. Do you know if there is a regional GRH program available in the event of unexpected emergencies and unscheduled overtime for commuters who rideshare or use public transportation?
Arlington Residents’ Awareness of Regional GRH is About Average for the Metro DC Region

Q102. Do you know if there is a regional GRH program available in the event of unexpected emergencies and unscheduled overtime for commuters who rideshare or use public transportation?
But Arlington Residents Are Less Likely to Have Registered for Any GRH Service

Percentages indicate those who registered for either a regional GRH service or a GRH service offered by an employer

Q103. In the past 2 years, have you registered for or used any GRH service?
Commuters Who Work in Arlington Are Slightly More Likely to Be Aware of and to Use GRH

38% of commuters who work in Arlington said they knew of a regional GRH program

6% said they had registered or used any Guaranteed Ride Home service

30% of those registering/using believed the program was provided by their employer and 51% said Commuter Connections sponsored the service. 11% cited Richmond RideFinders.

Q102. Do you know if there is a regional GRH program available in the event of unexpected emergencies and unscheduled overtime for commuters who rideshare or use public transportation?

Q103. In the past 2 years, have you registered for or used any GRH service?

Q104. Who sponsored or offered the service?
HOV Lanes
Arlington County Has the Highest Ratio of HOV Lanes to Interstate in Virginia

Hampton Roads and Northern Virginia Are the Only Markets with HOV Lanes But Other Residents Commute to Areas that Have HOV Lanes

<table>
<thead>
<tr>
<th>Market</th>
<th>Miles of Interstate</th>
<th>Miles of HOV Lanes</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlington County</td>
<td>11</td>
<td>10</td>
<td>91%</td>
</tr>
<tr>
<td>Fairfax County</td>
<td>52</td>
<td>40</td>
<td>77%</td>
</tr>
<tr>
<td>Prince William County</td>
<td>26</td>
<td>17</td>
<td>65%</td>
</tr>
<tr>
<td>Alexandria</td>
<td>5</td>
<td>3</td>
<td>60%</td>
</tr>
<tr>
<td>Hampton Roads</td>
<td>130</td>
<td>35</td>
<td>27%</td>
</tr>
<tr>
<td>Feeder Markets</td>
<td>314</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Richmond</td>
<td>150</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Roanoke</td>
<td>135</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Non-served Markets</td>
<td>99</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Front Royal</td>
<td>75</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>52</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>47</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Culpeper</td>
<td>22</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Loudon County, Middle Peninsula, and Northern Neck do not have any interstates or HOV lanes.

Source: VDOT, 2006
35% of Arlington *resident* commuters said they had access to an HOV lane on their route to work

22% who had access used the lanes
- Represents 7% of total respondents

Note: Some HOV users violate restrictions. Other research suggests that perhaps 10% of drive alone users of HOV lanes commute in the lanes during hours of restriction. (Source: *Dulles Corridor Metrorail Project Impact Research*, March 2006)

Q46. Is there a special HOV lane that can be used only by carpools, vanpools and buses along your route to work?
Q47. Do you use the HOV lane to get to or from work?
48% of commuters who work in Arlington said they had access to an HOV lane on their route to work.

45% who had access used the lanes
- Represents 21% of total respondents

Note: Some HOV users violate restrictions. Other research suggests that perhaps 10% of drive alone users of HOV lanes commute in the lanes during hours of restriction. (Source: Dulles Corridor Metrorail Project Impact Research, March 2006)

Q46. Is there a special HOV lane that can be used only by carpools, vanpools and buses along your route to work?
Q47. Do you use the HOV lane to get to or from work?
Q50. How much time does the HOV lane save you in your one-way trip to or from work?
HOV Users Who Lived in Areas Where they Could Save More Time with HOV were More Likely to Say the Lanes Influenced their Mode Choice

- **Prince William**: 73%
- **Fredericksburg**: 68%
- **Fairfax**: 54%
- **Loudoun**: 44%
- **Arlington**: 42%
- **Alexandria**: 38%
- **Hampton Roads**: 13%

60% of those who work in Arlington (and use HOV lanes) said that the lanes influenced their decision.

Q51. Did the HOV lane influence your decision to use your current way of commuting?

*Alexandria Residents* (n = 48)
*Fairfax Residents* (n = 54)
*Loudoun Residents* (n = 64)
*Prince William Residents* (n = 139)
*Fredericksburg Residents* (n = 116)
*Hampton Roads Residents* (n = 48)
*Arlington Residents* (n = 42)
*Arlington Employees* (n = 101)
Park-and-Ride Lots
Arlington Has a Lower Ratio of Park and Ride Spaces to Resident Commuters Than Other VA Areas

<table>
<thead>
<tr>
<th>Area</th>
<th>Number of Lots</th>
<th>Spaces per 1000 Commuters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prince William</td>
<td>36</td>
<td>23</td>
</tr>
<tr>
<td>Fairfax</td>
<td>33</td>
<td>8</td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>26</td>
<td>17</td>
</tr>
<tr>
<td>Richmond</td>
<td>20</td>
<td>2</td>
</tr>
<tr>
<td>Hampton Roads</td>
<td>14</td>
<td>1</td>
</tr>
<tr>
<td>Prince William</td>
<td>20</td>
<td>4</td>
</tr>
<tr>
<td>NoVA Service Markets</td>
<td>12</td>
<td>4</td>
</tr>
<tr>
<td>Rural Markets</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>NoVA Service Markets</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>C-ville</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>Loudoun</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Feeder</td>
<td>28</td>
<td>4</td>
</tr>
<tr>
<td>Non-served</td>
<td>43</td>
<td>2</td>
</tr>
</tbody>
</table>

Note: Alexandria does not have any Park and Ride Lots

Source: VDOT, 2006
18% of Arlington resident commuters said they knew the location of a park & ride lot on their route to work. 52% said they were not aware or don’t know, 30% said there weren’t any. 9% of those who knew location used the lots commuting to work.

Q52. Do you know the location of Park & Ride lots along the route you take to work? Q53. In the past year, have you used Park & Ride lots when commuting to work?
 Awareness of P&R Locations among Arlington Residents Is Lower Than in Other Regions

Q52. Do you know the location of Park & Ride lots along the route you take to work?

Low Park & Ride lot awareness in Arlington is likely due to low need as most residents can walk to bus stops and train stations
Arlington Residents are Least Likely to be Aware of P&R of All Metro DC Region Commuters

Q52. Do you know the location of Park & Ride lots along the route you take to work?

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>74%</td>
</tr>
<tr>
<td>Arlington</td>
<td>60%</td>
</tr>
<tr>
<td>Calvert</td>
<td>58%</td>
</tr>
<tr>
<td>Charles</td>
<td>54%</td>
</tr>
<tr>
<td>Frederick</td>
<td>42%</td>
</tr>
<tr>
<td>Prince George's</td>
<td>39%</td>
</tr>
<tr>
<td>Loudoun</td>
<td>39%</td>
</tr>
<tr>
<td>Montgomery</td>
<td>39%</td>
</tr>
<tr>
<td>Fairfax</td>
<td>37%</td>
</tr>
<tr>
<td>Metro DC</td>
<td>39%</td>
</tr>
<tr>
<td>Prince William</td>
<td>23%</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>23%</td>
</tr>
<tr>
<td>Alexandria</td>
<td>19%</td>
</tr>
</tbody>
</table>
Arlington Residents’ Use of P&R (of those aware) also is Low Compared to Other Areas

Q53. In the past year, have you used Park & Ride lots when commuting to work?

Low Park & Ride lot use is likely due to low need as most residents can walk to bus stops and train stations.
Arlington Residents are Least Likely to Have Used P&Rs of All Metro DC Region Commuters

Q52. Do you know the location of Park & Ride lots along the route you take to work?
47% of commuters who work in Arlington said they knew the location of a park & ride lot on their route to work. 31% said they were not aware or don’t know, 23% said there weren’t any.

33% of those who knew location used the lots commuting to work.

Q52. Do you know the location of Park & Ride lots along the route you take to work? Q53. In the past year, have you used Park & Ride lots when commuting to work?
Key Finding:

Arlington residents and employees have many travel options. Transit service in Arlington is among the best in Virginia and equal to that of the District of Columbia.

HOV lanes are plentiful in the area but there are not many park and ride lots to support them and awareness and use of existing park and ride lots is low.

HOV lane use is more common for those who work in Arlington than for those who live in Arlington.

Use of Guaranteed Ride Home also is lower in Arlington, perhaps because transit is so widely available at all times of day and carpool/vanpool use is relatively low.
Strategic Implication:

Transit is the dominant alternative mode option for resident commuters in Arlington.

Carpooling tends to take a backseat for residents, perhaps because trip lengths are relatively short. However, it is an option for those who cannot use or prefer not using transit.

Services such as ridematching and Guaranteed Ride Home and infrastructure such as Park & Ride lots and HOV lanes should be included in Arlington’s well-rounded offering services to encourage carpooling and vanpooling.
Regional Commuter Services
said there was a regional number/Web site for commute information.
However Few Could Name Either a Regional or Arlington Number or Web Site Unaided

- **3%** of residents and **1%** of workers were able to cite a specific Arlington number/site unaided;
- **4%** of residents and **9%** of workers cited Commuter Connections unaided

When aided by the interviewer, another **38%** of residents and **35%** of workers were aware of ACCS (aided awareness) and **50%** of residents and **63%** of workers were aware of Commuter Connections (aided).

Q81. Is there a phone number or website you can use to obtain information on ridesharing, public transportation, HOV lanes, and telecommuting in the area where you live or work? Q83. What is it?
Q88d. Have you heard of an organization or service called <PROGRAM>?
### ACCS is in the Middle in Terms of Awareness Level Among Local Commuter Organizations

<table>
<thead>
<tr>
<th>Region Residents</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexandria</td>
<td>600</td>
</tr>
<tr>
<td>Arlington</td>
<td>600</td>
</tr>
<tr>
<td>Fairfax</td>
<td>601</td>
</tr>
<tr>
<td>Loudoun</td>
<td>603</td>
</tr>
<tr>
<td>Prince William</td>
<td>601</td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>604</td>
</tr>
<tr>
<td>Hampton Roads</td>
<td>607</td>
</tr>
<tr>
<td>Richmond</td>
<td>632</td>
</tr>
<tr>
<td>Culpeper</td>
<td>305</td>
</tr>
<tr>
<td>Front Royal</td>
<td>303</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>301</td>
</tr>
<tr>
<td>Mid Peninsula</td>
<td>202</td>
</tr>
<tr>
<td>Northern Neck</td>
<td>176</td>
</tr>
<tr>
<td>Roanoke</td>
<td>300</td>
</tr>
</tbody>
</table>

| Question asked of all those living or working in specific area or region |

Q88d. Have you heard of an organization or service called <PROGRAM>?

- Richmond RideFinders: 79%
- Hampton Roads TRAFFIX: 53%
- PRTC OmniMatch: 50%
- Charlottesville Rideshare: 46%
- Northern Neck Rideshare: 45%
- Culpeper (Rapp-Rap): 40%
- Arlington County Commuter Services (ACCS): 38%
- Fredericksburg (RADCO): 38%
- Alexandria Rideshare: 33%
- Loudoun County Office of Trans. Svc.: 32%
- Mid Peninsula Rideshare: 32%
- Roanoke Ride Solutions: 14%
- Front Royal (Valley): 12%
- Fairfax County Ride Sources: 11%
ACCS had Third Highest Awareness of the Washington Region’s Local Commuter Organizations

<table>
<thead>
<tr>
<th>Organization</th>
<th>Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRTC OmniMatch</td>
<td>49%</td>
</tr>
<tr>
<td>TransIT Services of Frederick County</td>
<td>47%</td>
</tr>
<tr>
<td>Arlington County Commuter Services (ACCS)</td>
<td>37%</td>
</tr>
<tr>
<td>Tri-County Council of Southern Maryland</td>
<td>35%</td>
</tr>
<tr>
<td>Loudoun County Office of Trans. Svc.</td>
<td>31%</td>
</tr>
<tr>
<td>Alexandria Rideshare</td>
<td>28%</td>
</tr>
<tr>
<td>RideSmart (Prince George's Co)</td>
<td>16%</td>
</tr>
<tr>
<td>Montgomery County Commuter Services</td>
<td>13%</td>
</tr>
<tr>
<td>Fairfax County Ride Sources</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q88d. Have you heard of an organization or service called <PROGRAM>?

Region Residents:
Excludes self-employed and Work-at-home employees.

- Arlington: n = 879
- Alexandria: n = 746
- Calvert/Charles: n = 1,223
- Fairfax: n = 1,331
- Frederick: n = 626
- Loudoun: n = 662
- Montgomery: n = 923
- Prince George's: n = 886
- Prince William: n = 630

Note: Data include only residents of the 11-jurisdiction MWCOG region, so percentages might differ from charts that use all VA SOC data.
21% of Arlington resident commuters aware of ACCS said they had contacted or visited the ACCS Web site or The Commuter Store
- Represents 8% of total respondents

5% of Arlington resident commuters aware of Commuter Connections said they had contacted Commuter Connections
- Represents 3% of total respondents

Q88e. Have you contacted <PROGRAM> in the past year or visited a website sponsored by this organization?
Q88a. Have you contacted Commuter Connections in the past year or visited a website sponsored by this organization?
Arlington Has the Highest Level of Resident Commuters Contact/Use of Organization or Web Site - But, Overall, Percentages Are Quite Low

Among Arlington Residents, those who used alternate modes of transportation (e.g., carpool, train, bus) were more than twice as likely to have contacted a commuter organization or visited their Web site, 27% vs. 12%.

Q88e. Have you contacted <Q88d PROGRAM OR SERVICE> in the past year or visited a website sponsored by this organization?
Arlington was the Most Used Program of those Operating in the Washington Metro Area

Q88e. Have you contacted <Q88d PROGRAM OR SERVICE> in the past year or visited a website sponsored by this organization?

Note: Data include only residents of the 11-jurisdiction MWCOG region, so percentages might differ from charts that use all VA SOC data.
20% of commuters who work in Arlington and are aware of ACCS said they had contacted or visited the ACCS Web site or The Commuter Store
- Represents 7% of total respondents

5% of commuters who work in Arlington and are aware of Commuter Connections said they had contacted Commuter Connections
- Represents 3% of total respondents

Have you contacted <PROGRAM> in the past year or visited a website sponsored by this organization? Q88a. Have you contacted Commuter Connections in the past year or visited a website sponsored by this organization?
Key Finding:
Unaided awareness of the ACCS phone number/Web site among Arlington residents is only 3%. Total awareness of ACCS is 38%. But 21% of residents aware have made contact with ACCS.

Strategic Implication:
Branding is crucial for ACCS. The Arlington area is a prime market for alternative transportation, but commuters need help to convert. It is especially important in an area where market forces make alternative commute modes attractive, that consumers know where to go to find information. Increasing awareness and having a clear message and call to action are paramount to achieving these goals.
Regional Advertising
55% of Arlington resident commuters said they recalled seeing, hearing, or reading about any advertising about commuting

- 37% recalled a specific message
- 9% identified ACCS as the sponsor
  - 4% of Arlington residents identified Commuter Connections as the sponsor and 4% identified MWCOG
  - Arlington residents were more likely to identify Metro/WMATA as the sponsor (34%)
Most Recalled Messages Were “Use the Bus/Train” And “Call for Carpool/Vanpool Information”

Q62. What messages do you recall from this advertising?

VA Statewide Averages
- Bus/train – 14%
- Carpool/vanpool – 15%
- New trains/buses – 8%
- Environment – 7%
- GRH – 3%
- Reduce traffic – 4%

Only most frequently mentioned responses are shown.

Arlington Residents n = 342

Multiple responses permitted
Arlington Resident Commuters
Saw/Heard Ads in Multiple Places

Q64. Where did you see, hear or read this advertisement?

VA Statewide Averages
Radio – 25%
Train/Bus – 11%
Newspaper – 24%
TV – 39%
Train station – 2%
Postcard – 2%
Work – 4%

Most frequently mentioned responses are shown.

Asked of those recalling specific ad messages
Arlington Residents n = 236
Multiple responses permitted
Arlington Residents Had the Second Highest Advertising Recall in the Area

Q61. Have you heard, seen, or read any advertising about commuting in the past year?

<table>
<thead>
<tr>
<th>Region</th>
<th>Residents</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>VA Statewide</td>
<td>n = 7,045</td>
<td></td>
</tr>
<tr>
<td>Alexandria</td>
<td>n = 600</td>
<td></td>
</tr>
<tr>
<td>Arlington</td>
<td>n = 600</td>
<td></td>
</tr>
<tr>
<td>Fairfax</td>
<td>n = 601</td>
<td></td>
</tr>
<tr>
<td>Loudoun</td>
<td>n = 601</td>
<td></td>
</tr>
<tr>
<td>Prince William</td>
<td>n = 601</td>
<td></td>
</tr>
<tr>
<td>NoVA Service Markets</td>
<td>n = 609</td>
<td></td>
</tr>
<tr>
<td>Charlottesville</td>
<td>n = 301</td>
<td></td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>n = 604</td>
<td></td>
</tr>
<tr>
<td>Hampton Roads</td>
<td>n = 607</td>
<td></td>
</tr>
<tr>
<td>Richmond</td>
<td>n = 632</td>
<td></td>
</tr>
<tr>
<td>NoVA Service Markets</td>
<td>n = 609</td>
<td></td>
</tr>
<tr>
<td>Rural Markets</td>
<td>n = 678</td>
<td></td>
</tr>
<tr>
<td>Feeder</td>
<td>n = 302</td>
<td></td>
</tr>
<tr>
<td>Non-served</td>
<td>n = 307</td>
<td></td>
</tr>
</tbody>
</table>
Arlington Residents Had the Highest Advertising Recall in the Metro DC Region

Q61. Have you heard, seen, or read any advertising about commuting in the past year?

Region Residents
Excludes self-employed and Work-at-home

Alexandria n = 600
Arlington n = 600
Calvert n = 600
Charles n = 603
District of Columbia n = 600
Fairfax n = 600
Frederick n = 600
Loudoun n = 601
Montgomery n = 600
Prince George's n = 600
Prince William n = 601
Metro DC n = 6,060

Data from MWCOG survey only

Q61. Have you heard, seen, or read any advertising about commuting in the past year?

- Arlington: 57%
- Prince William: 57%
- Fairfax: 56%
- Montgomery: 56%
- Loudoun: 54%
- Alexandria: 54%
- Charles: 53%
- Metro DC: 52%
- Calvert: 47%
- Prince George's: 44%
- District of Columbia: 43%
- Frederick: 26%
57% of commuters who work in Arlington said they recalled seeing, hearing, or reading about any advertising about commuting:

- 48% recalled a specific message
- 1% identified ACCS as the sponsor
  - 5% of commuters who work in Arlington identified Commuter Connections as the sponsor, 1% identified MWCOG, and 8% identified Metro/WMATA. The majority did not know.

Q61. Have you heard, seen, or read any advertising about commuting in the past year?
Q62. What messages do you recall from this advertising? VASOC
Q63. What organization or group sponsored the ad you recall?
Key Finding:

Arlington resident commuters have the second highest advertising recall in the state and highest in the Washington Metro region, but only 9% is attributed to ACCS. Residents are more likely to recall advertising from Metro/WMATA and only a small percentage of commuters who work in Arlington attribute advertising to ACCS. Commuters are seeing and hearing ads in multiple areas – not just through one medium.

Strategic Implication:

Commuters in Arlington are exposed to transportation advertising from numerous sources. Acknowledging this and working with those partners will give you more bang for your buck, since you are all working toward the same goal – reduced VMT.
“Factors of Success” in Reducing Drive Alone Commuting

Goal: Reducing Drive Alone Commuting

- Market Need
- Rideshare Infrastructure
- Societal Awareness & Support
- Telework Opportunity
- Commuter Mindset
- Employer Support & Involvement
Three-quarters of Arlington Resident Commuters Said They Were Satisfied with Their Commute

73% of Arlington residents rated their commute satisfaction “4” or “5” on a 5-point scale where the higher the rating the more satisfied the respondent.

Q56a. Overall, how satisfied are you with your trip to work? Please use a scale of 1 to 5 where 1 means “not at all satisfied” and 5 means “very satisfied”? 
Arlington Residents Have One of the Higher Percentages of Satisfaction with Commute

Q56a. Overall, how satisfied are you with your trip to work? NOTE, THIS QUESTION WAS NOT ASKED IN THE MWCOG SURVEY
But Less than Half of Commuters Who Work in Arlington Said They Were Satisfied with Their Commute

Q56a. Overall, how satisfied are you with your trip to work? Please use a scale of 1 to 5 where 1 means “not at all satisfied” and 5 means “very satisfied”?
Recall, Arlington Residents Have the Slowest Commute in Virginia

The time it takes to travel one mile can be viewed as a measure of congestion.

Arlington Residents who drive alone to work average 2.5 minutes per mile.
Residents who use alternate modes average 3.9 minutes per mile.

Q16. / Q17. How long is your typical daily commute one way? Please tell me both how many minutes and how many miles. First, how many minutes? And how many miles?

Average commute speed:

- Arlington = 3.0 min/mile; about 20 mph average
- VA Statewide = 1.7 min/mile; about 35 mph average
Almost Twice as Many Arlington Resident Commuters Said Their Commute Has Become More Difficult in the Past Year as Said Their Commute Has Gotten Easier

Q57. Would you say your commute is easier, more difficult, or about the same now as it was one year ago? NOTE, THIS QUESTION WAS NOT ASKED IN THE MWCOG SURVEY

Arlington Residents
n = 549

VA Statewide Average
More difficult –25%
Same – 62%
Easier -11%

Easier

More difficult

Same

Not applicable

22%

64%

12%

2%
But Arlington Resident Commuters Were Among the Least Likely to Report a More Difficult of All Metro DC Region Commuters

Q57. Would you say your commute is easier, more difficult, or about the same now as it was one year ago? NOTE, THIS QUESTION WAS NOT ASKED IN THE MWCOG SURVEY
Arlington Commuters Who Said Their Commute Was More Difficult Cited Increased Congestion

Q58. In what way is it easier?
Q59. In what way is it more difficult? NOTE, THESE QUESTIONS WERE NOT ASKED IN THE MWCOCG SURVEY
Arlington Residents were quite satisfied with their commutes even though Arlington has one of the slowest commutes in the region. The high satisfaction is likely related to the availability of options in the County.
11% to 34% of Arlington Residents Started Using Alternative Modes within the Past Year; Only 9% of Residents who Drove Alone Started Using that Mode within the Last Year

Q18. How long have you been using <MODE Q15> to get to work?
Q34. How long have you been telecommuting?

These findings suggest that commuters do change commute modes and that commuters are being attracted to alternative modes such as carpooling and vanpooling. Thus, commuters can be persuaded to switch modes.

Percentages indicate those who started using the mode less than 1 year ago.
Attributes Can Be Classified in Terms of their Importance in Commute Travel Mode Choice – Time and Dependability Are Most Important to Arlington Residents

--- This pattern differs somewhat from the rest of the state ---

- **Time to get to work/home**: 26% 59% 85%
- **Dependability of trip**: 27% 57% 83%
- **Safety**: 14% 65% 79%
- **Flexibility to arrive/leave work**: 16% 60% 77%
- **Impact on environment**: 28% 33% 61%

VA Statewide Averages –
- Time 80%
- Dependability 90%
- Safety 86%
- Flexibility 83%
- Environment 57%

Tier 1
- Varies Tier 2
- Varies Tier 3

Q56b. How important to you are the following factors in choosing the type of transportation you use to get to work? “1” means “not at all important”, “5” means “very important”.

Arlington Residents
n = 82
Note: Only Callback Respondents answered this question
Q56b. How important to you are the following factors in choosing the type of transportation you use to get to work? “1” means “not at all important”, “5” means “very important”.

These Attributes Are Less Important to Arlington Residents

<table>
<thead>
<tr>
<th>Attribute</th>
<th>4</th>
<th>5 - Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stress you would experience on trip</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>Productive/personal use of travel time</td>
<td>16%</td>
<td>37%</td>
</tr>
<tr>
<td>Cost of travel to/from work</td>
<td>14%</td>
<td>39%</td>
</tr>
<tr>
<td>Ability to make stops/errands</td>
<td>15%</td>
<td>35%</td>
</tr>
<tr>
<td>Have time to yourself</td>
<td>20%</td>
<td>26%</td>
</tr>
<tr>
<td>Concern about being stranded</td>
<td>8%</td>
<td>35%</td>
</tr>
</tbody>
</table>
The Top Reason Why Northern Virginia Resident Commuters Don’t Carpool is That it Would Not Reduce Their Travel Time

- Would not reduce travel time: 71%
- Need to be able to leave work during day: 70%
- Can’t find pool that matches work hours/location: 58%
- Need to be able to make stops/run errands: 54%
- Would not save money: 46%
- Like driving myself: 45%
- Don't like riding w/strangers: 34%

Q56c. How important was each of the following as a reason you did not car/vanpool to work? “1” means “not at all important, “5” means “very important”.

Northern Virginia Residents: n = 172
Excludes those that said “don’t know.”
Northern Virginia data was used as the sample size was too small for Arlington or Inner Beltway.
Northern VA Residents who Did not Use Bus Said It was Because They Needed Travel Flexibility to Make Trips Before, During, or After the Workday

- Need to be able to make stops/run errands: 17% (4), 44% (5), 62% (Total)
- Need to be able to leave work during day: 14% (4), 48% (5), 61% (Total)
- Would take longer: 9% (4), 51% (5), 60% (Total)
- Would not reduce travel time: 9% (4), 51% (5), 60% (Total)
- No bus/train goes to workplace when I need: 6% (4), 53% (5), 59% (Total)
- Like driving myself: 17% (4), 39% (5), 56% (Total)
- Would not save money: 9% (4), 37% (5), 46% (Total)
- Like riding alone: 12% (4), 28% (5), 40% (Total)
- Don’t like riding w/strangers: 7% (4), 31% (5), 37% (Total)

Q56d. How important was each of the following as a reason you did not ride a bus to work? “1” means “not at all important,” “5 means “very important”.

Northern Virginia Residents
n = 154
(n varies slightly for each attribute)
Excludes those that said “don’t know.”
Northern Virginia data was used as the sample size was too small for Arlington or Inner Beltway

VA Statewide Averages
Top-Two Boxes
Errands – 68%
Leave - 77%
Longer - 72%
Time - 69%
No bus/train – 72%
Like driving – 66%
Money – 49%
Ride alone – 46%
Strangers – 41%

Question asked of those with bus available
Key Finding:

11% - 34% of alternative mode users who live in Arlington started using these modes within the past 12 months.

Strategic Implication:

Continuous marketing is important. Decisions about mode choice are being made all the time, and the need to encourage commuters to consider alternate modes is constant.
Key Finding:
Commuters who live in Arlington want efficient and dependable commutes. Secondarily they consider safety and flexibility when deciding what commute mode to use. Concern for the environment plays a lesser role in their commute decisions.

Strategic Implication:
To convert drive alone commuters to alternate transportation users, messages should focus on what matters most to commuters: efficiency (what time they get to and from work), dependability, safety, and flexibility. Currently, concern for the environment is not the primary reason commuters try ridesharing.
Key Finding:
70% of those who do not carpool or vanpool say it’s because they need to be able to leave work during the day. 71% said they don’t carpool or vanpool because it would not reduce travel time. 58% say it’s because they can’t find a carpool match.

Strategic Implication:
Carsharing and transit can provide mid-day transportation. Work with employers to let commuters know about these options. The fact that carpooling does not reduce travel time is more difficult to address. The carpool/vanpool program in Arlington has been less robust than in other areas because of the availability of transit, transit subsidies, and shorter trips. However, carpool services should be provided to encourage use of this mode for commuters who cannot or prefer not to use transit.
Internet Ridematching
17% of Arlington Residents and 13% of Those Who Work in Arlington Said They Would Definitely or Probably Use Internet Ridematching

Q104a. [Read internet ridematching concept] If a service like this was available in the area where you live or work and your personal information was kept confidential, how likely would you be to use it? NOTE, THIS QUESTION WAS NOT ASKED IN THE MWCOG SURVEY
Target Online Ridematching Services to Residents Who Are Most Likely to Use Them: Non-whites, Those with Incomes Less than $100,000, and Younger Commuters Who Live in Arlington

<table>
<thead>
<tr>
<th></th>
<th>Race</th>
<th>Income</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>White</td>
<td>Non-white</td>
<td>&lt;$100,000</td>
</tr>
<tr>
<td>Definitely use</td>
<td>3%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Probably use</td>
<td>8%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Total</td>
<td>11%</td>
<td>24%</td>
<td>22%</td>
</tr>
</tbody>
</table>

CAUTION – SMALL SAMPLE SIZES
White n = 38
Non-white n = 49
Less than $100,000 n = 49
$100,000 and higher n = 40
Under 45 n = 65
45 and older n = 24

There was no difference in Gender.

Q104a. [Read internet ridematching concept] If a service like this was available in the area where you live or work and your personal information was kept confidential, how likely would you be to use it?
Internet Ridematch

- Residents who **were not interested in online ridematching** cited barriers to carpooling in general, not the service:

<table>
<thead>
<tr>
<th>Arl Residents</th>
<th>All VA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not interested in carpool/vanpool</td>
<td>52%</td>
</tr>
<tr>
<td>Can’t carpool/vanpool due to personal circumstances</td>
<td>37%</td>
</tr>
<tr>
<td>Concerned about privacy</td>
<td>6%</td>
</tr>
</tbody>
</table>

- **Interested** respondents are willing to provide:

<table>
<thead>
<tr>
<th>Arl Residents</th>
<th>All VA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email address</td>
<td>63%</td>
</tr>
<tr>
<td>Phone number</td>
<td>27%</td>
</tr>
<tr>
<td>Postal address</td>
<td>17%</td>
</tr>
<tr>
<td>None of these</td>
<td>14%</td>
</tr>
</tbody>
</table>

Q104b. For what reasons would you not be interested in using this service?
Q104c. Would you be willing to provide any of the following information on this website for other commuters to use to contact you...?
More Than a Third of Arlington Commuters Who Do Not Carpool or Vanpool Said They Would Be Willing to Try Carpool or Vanpool to Receive “Frequent Flyer” Type Reward Points

Q104f. Suppose commuters who carpool or vanpool to work could receive a financial reward or incentive for each day they rode to work with other people. How willing would you be to carpool or vanpool to work <at least occasionally, more often> to receive these points?

Arlington Residents - 39%
Arlington Employees – 38%

Commuters whose primary mode is not carpooling or vanpooling
VA Statewide n = 3,811
Arlington Residents n = 82
Arlington Employees n = 75
Excludes those that said “don’t know”
“Factors of Success” in Reducing Drive Alone Commuting

Goal: Reducing Drive Alone Commuting

- Market Need
- Societal Awareness & Support
- Rideshare Infrastructure
- Telework Opportunity
- Commuter Mindset
- Employer Support & Involvement

Employer Support & Involvement

Societal Awareness & Support

Rideshare Infrastructure

Telework Opportunity

Commuter Mindset

Market Need

Goal: Reducing Drive Alone Commuting
Employer support is an essential element of a regional or local TDM program. It can play the “retail” function that complements and extends the TDM agency’s “wholesale” function. An employers’ support also can encourage commuters’ choice of non drive-alone options by creating a work environment in which these modes are welcomed.

Note: This section presents results for commuters who work in Arlington County. The section derives data from two sources. Comparisons to other Virginia jurisdictions draw data from the expanded VASOC dataset, including workers who travel from Virginia regions outside the Metro DC region. It is the most complete picture of employees commuting to Arlington. Comparisons between Arlington and other Metro DC jurisdictions includes only data for residents of the 11-county MWCOG SOC survey region. These data were used to make an equivalent comparison with other Metro DC jurisdictions.
68% of commuters who work in Arlington said their employers offered one or more TDM services

- Transit/vanpool subsidy 52%
- Commute information 32%
- Preferential parking for carpools 19%
- Bike/walk facilities/programs 18%
- Guaranteed Ride Home 8%
- Parking discounts for carpools 5%
- Carpool subsidy 5%

Note: This question reflects commuters’ perceptions. These perceptions may not represent the actual incidence of these TDM benefits and services in Arlington.

Q89/92/93/94/95/96/97. Next, please tell me if your employer makes any of the following commute services or benefits available to you. [Read list of services]
Commuters Who Work in Arlington Are More Likely than those in Other Virginia Regions to Say their Employers Provide Commute Services

Q89/92/93/94/95/96/97. Next, please tell me if your employer makes any of the following commute services or benefits available to you. [Read list of services]
Region Residents

Excludes self-employed and Work-at-home

Alexandria  
  n = 312
Arlington  
  n = 420
Calvert  
  n = 198
Charles  
  n = 232
District of Columbia  
  n = 1,767
Fairfax  
  n = 995
Frederick  
  n = 314
Loudoun  
  n = 306
Montgomery  
  n = 629
Prince George's  
  n = 481
Prince William  
  n = 185
Metro DC  
  n = 6,181

Data from MWCOG SOC survey only

Arlington Employees Topped all Other Metro DC Region Commuters in their Access to Employer-Provided Commute Services

Q89/92/93/94/95/96/97. Next, please tell me if your employer makes any of the following commute services or benefits available to you. [Read list of services]
Arlington Employees were Particularly Likely to Note the Access to Transit Subsidies Offered by their Employers

Q89/92/93/94/95/96/97. Next, please tell me if your employer makes any of the following commute services or benefits available to you. [Metrochek, SmartBenefit, other transit subsidy]
Arlington Employees also Noted High Access to Bicycle Information and Services Offered by their Employers

Q89/92/93/94/95/96/97. Next, please tell me if your employer makes any of the following commute services or benefits available to you. [Services or information for bicycling]
33% of commuters working in Arlington County reported using one or more employer-provided services/benefits

- 21% subsidy
- 12% information on commute options
- 5% preferential parking
- 3% bike/walk programs/facilities
- 2% parking discounts for car/vanpools
- 2% GRH
- 1% Car/vanpool subsidy

35% of commuters who live in Arlington use employer-provided services/benefits.

Q89a/92a/93a/94a/95a/96b/97a. Have you used [Read list of services]
Commuters who Work in Arlington are Most Likely of all Virginia Regions to Use Employer-provided TDM Services

Q89a/92a/93a/94a/95a/96b/97a. Have you used [Read list of services]
Arlington Employees was Second only to DC Among all Other Metro DC Region Commuters in their Use of Employer-Provided Commute Services

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>District of Columbia</td>
<td>39%</td>
</tr>
<tr>
<td>Arlington</td>
<td>35%</td>
</tr>
<tr>
<td>Alexandria</td>
<td>26%</td>
</tr>
<tr>
<td>Metro DC</td>
<td>25%</td>
</tr>
<tr>
<td>Montgomery</td>
<td>23%</td>
</tr>
<tr>
<td>Prince George's</td>
<td>18%</td>
</tr>
<tr>
<td>Fairfax</td>
<td>13%</td>
</tr>
<tr>
<td>Charles</td>
<td>13%</td>
</tr>
<tr>
<td>Frederick</td>
<td>12%</td>
</tr>
<tr>
<td>Calvert</td>
<td>12%</td>
</tr>
<tr>
<td>Prince William</td>
<td>10%</td>
</tr>
<tr>
<td>Loudoun</td>
<td>9%</td>
</tr>
</tbody>
</table>

Region Residents Excludes self-employed and Work-at-home

Alexandria  n = 312
Arlington  n = 420
Calvert  n = 198
Charles  n = 232
District of Columbia  n = 1,767
Fairfax  n = 995
Frederick  n = 314
Loudoun  n = 306
Montgomery  n = 629
Prince George’s  n = 481
Prince William  n = 185
Metro DC  n = 6,181

Data from MWCOG SOC survey

Q89a/92a/93a/94a/95a/96b/97a. Have you used [Read list of services]
Those Who Work in Arlington And Had Employer-Provided Commuter Benefits Were Less Likely To Drive Alone and More Likely to Use Alternative Modes

Q15. Primary mode defined as mode used most often vs..
Q89/92/93/95/96/97. Please tell me if your employer makes any of the following commute services or benefits available to you – Information, parking discounts, special parking spaces, subsidies, cash payments, bike/walk facilities, guaranteed ride home?

Arlington Employees
Services n = 291
No Services n = 121
Data from MWCOG SOC survey

Drive alone
Alternative Modes

Services not offered
Services offered

71% 55%
29% 45%

Services include:
• Parking discounts
• Preferential parking spaces
• Transit, CP/VP subsidies
• Bike/walk facilities
• Guaranteed Ride Home
• Commute information
52% of commuters working in Arlington reported that they have free parking at work

- 48% had free on-site parking
- 4% had free off-site parking
- 11% employee had to pay all or part of cost of parking

Q90. What about free on-site parking? Does your employer make that available to all employees at your worksite?
Q91. Does your employer pay part of your parking cost or do you have to pay the entire cost if you drive to work?
Arlington Employees were Less Likely than Most Metro DC Commuters to Have Free Parking at Work

Q89/92/93/94/95/96/97. Next, please tell me if your employer makes any of the following commute services or benefits available to you. [Services or information for bicycling]
Among Commuters who Work in Arlington, the Drive Alone Rate Is Lower When Parking Is NOT Free

Values represent the proportion of commuters who have to pay to park and those who do not (including free off-site parking), by commute mode.

Arlington Employees
Free Parking  n = 224
No Free Parking  n = 189

Data from MWCOG SOC survey only

Q90. Does employer offer free parking.
Q91. Does your employer pay part of your parking cost or do you have to pay the entire cost if you drive to work?
Key Finding:

68% of commuters who work in Arlington said that they have TDM services or benefits available at work, and 33% have used those services. Drive alone rates are significantly lower among those having employer services. Only about half of commuters who work in Arlington report having free parking at work, considerably lower than the VA statewide average. Drive alone rates also were lower when parking was not free.

Strategic Implication:

Employer-provided TDM services are a necessary part of reducing drive alone rates. Efforts to discourage the availability of free parking also should be undertaken, to remove this incentive to drive alone.
“Factors of Success” in Reducing Drive Alone Commuting

Goal:

Reducing Drive Alone Commuting

Market Need

Societal Awareness & Support

Rideshare Infrastructure

Telework Opportunity

Commuter Mindset

Employer Support & Involvement
50% of Arlington Resident Commuters have a telework program available at work
- 24% Formal Program, 26% Informal Program

22% Telework at Least Occasionally

Q13. Telecommuters are defined as “wage and salary employees who at least occasionally work at home or at a telework or satellite center during an entire work day instead of travelling to their regular workplace.” Based on this definition, are you a telecommuter?

Q13a./ Q14d. Does your employer have a formal telecommuting program at your workplace or (do you/permit employees to) telecommute under an informal arrangement between you and your supervisor?
Arlington Resident Commuters Are the Most Likely of All Virginia Commuters to Say that Their Employer Offers Telework

Q13a./Q14d. Does your employer have a formal telecommuting program at your workplace or (do you/permit employees to) telecommute under an informal arrangement between you and your supervisor?

Note: Telework!VA is currently focused on Northern Virginia. Richmond has also been aggressively promoting teleworking.
Arlington Resident Commuters Are More Likely to Telework than Are Residents of Most Other Areas in Virginia

Q13. Telecommuters are defined as “wage and salary employees who at least occasionally work at home or at a telework or satellite center during an entire work day instead of traveling to their regular workplace.” Based on this definition, are you a telecommuter?
But Arlington Resident Teleworkers Telework Less Frequently than Those in Other Regions

Q14. How often do you usually telecommute?
Arlington Residents Teleworked at a Rate Higher than the Average for the Metro DC Region

Q13. Telecommuters are defined as “wage and salary employees who at least occasionally work at home or at a telework or satellite center during an entire work day instead of traveling to their regular workplace.” Based on this definition, are you a telecommuter?

Region Residents
Excludes self-employed and Work-at-home

Arlington
n = 561
Alexandria
n = 560
Calvert
n = 551
Charles
n = 575
District of Columbia
n = 538
Fairfax
n = 543
Frederick
n = 563
Loudoun
n = 561
Montgomery
n = 561
Prince George's
n = 568
Prince William
n = 573
Metro DC
n = 6,168

Respondent teleworks at least occasionally
Q15. Now thinking about LAST week, how did you get to work each day.

4% of Arlington Resident Commuters Reported that They **Primarily** Telework; No Area Had More than 7%

Primary telework means the commuter teleworks most of his/her work days.
49% of Commuters who work in Arlington have a telework program available at work - 20% Formal Program, 26% Informal Program

20% Telework at Least Occasionally

Q13. Telecommuters are defined as “wage and salary employees who at least occasionally work at home or at a telework or satellite center during an entire work day instead of travelling to their regular workplace.” Based on this definition, are you a telecommuter?

Q13a./ Q14d. Does your employer have a formal telecommuting program at your workplace or (do you/permit employees to) telecommute under an informal arrangement between you and your supervisor?
Commuters who Work in Arlington Are the Most Likely of all Metro DC Commuters to Say that Their Employer Offers Telework

Q13a./ Q14d. Does your employer have a formal telecommuting program at your workplace or (do you/permit employees to) telecommute under an informal arrangement between you and your supervisor?
Arlington Resident Teleworkers Tend to Telework Less Often than Those Who Work in Arlington

Q14. How often do you usually telecommute?

- **Telework 1+ days a week:**
  - Arlington Residents = 44%
  - Arlington Employees = 52%
  - VA Statewide = 60%

**Teleworkers**

- VA Statewide: n = 920
- Arlington Residents: n = 127
- Arlington Employees: n = 98
Arlington Resident Teleworkers Adopted that Mode for a Variety of Reasons – including Personal Circumstances, Availability, and Productivity

Q40. Why did you start to telecommute?

Most frequently mentioned responses are shown.

- Personal circumstances
- New option that became available
- Get more work done
- Convenient
- Save time
- Stay with family or children
- Initiated request on my own
- Changed jobs / works hours
- Avoid congestion
- Quiet, uninterrupted

Arlington Residents n = 127
VA Statewide n = 921
Most Arlington Teleworkers Learned About Telework from their Employers, But a Third of Residents and More Than a Quarter of Those Who Work in Arlington Initiated it on Their Own

Q42. How did you find out about telecommuting?

<table>
<thead>
<tr>
<th>Method</th>
<th>VA Statewide</th>
<th>Arlington Residents</th>
<th>Arlington Employees</th>
<th>Teleworkers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program at work/employer</td>
<td>44%</td>
<td>52%</td>
<td>55%</td>
<td>44%</td>
</tr>
<tr>
<td>Initiated on my own</td>
<td>33%</td>
<td>27%</td>
<td>26%</td>
<td>33%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>
An Additional 38% of Arlington Resident Commuters “Could and Would” Telework If Offered the Opportunity

Non-teleworkers who
- Have telework-appropriate job responsibilities
  “Could” 45%

Are interested in teleworking
- Regular
  “Would” 8%
- Occasional
  30%

Q14e. Would your job responsibilities allow you to work at a location other than your main work place at least occasionally?
Q14f. Would you be interested in telecommuting on an occasional or regular basis?
Arlington has the Highest Percentage of Commuters who “Could and Would Telework” of All Regions; But Arlington Teleworkers Prefer to Telework Occasionally

<table>
<thead>
<tr>
<th>Job Would Allow Teleworking</th>
<th>Would Be Interested in Teleworking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlington</td>
<td>Arlington</td>
</tr>
<tr>
<td>45%</td>
<td>30% 10%</td>
</tr>
<tr>
<td>Alexandria</td>
<td>Alexandria</td>
</tr>
<tr>
<td>43%</td>
<td>24% 12%</td>
</tr>
<tr>
<td>Fairfax</td>
<td>Fairfax</td>
</tr>
<tr>
<td>39%</td>
<td>23% 16%</td>
</tr>
<tr>
<td>Metro DC</td>
<td>Metro DC</td>
</tr>
<tr>
<td>37%</td>
<td>25% 11%</td>
</tr>
<tr>
<td>Richmond</td>
<td>Richmond</td>
</tr>
<tr>
<td>35%</td>
<td>21% 9%</td>
</tr>
<tr>
<td>Suburban MD</td>
<td>Suburban MD</td>
</tr>
<tr>
<td>35%</td>
<td>19% 10%</td>
</tr>
<tr>
<td>Loudoun</td>
<td>Loudoun</td>
</tr>
<tr>
<td>33%</td>
<td>18% 10%</td>
</tr>
<tr>
<td>Prince William</td>
<td>Prince William</td>
</tr>
<tr>
<td>33%</td>
<td>18% 10%</td>
</tr>
<tr>
<td>VA Statewide</td>
<td>VA Statewide</td>
</tr>
<tr>
<td>31%</td>
<td>17% 10%</td>
</tr>
<tr>
<td>Alexandria</td>
<td>Alexandria</td>
</tr>
<tr>
<td>31%</td>
<td>15% 9%</td>
</tr>
<tr>
<td>Fredericksburg</td>
<td>Fredericksburg</td>
</tr>
<tr>
<td>31%</td>
<td>15% 9%</td>
</tr>
<tr>
<td>Charlottesville</td>
<td>Charlottesville</td>
</tr>
<tr>
<td>30%</td>
<td>14% 8%</td>
</tr>
<tr>
<td>NoVA Service Markets</td>
<td>NoVA Service Markets</td>
</tr>
<tr>
<td>27%</td>
<td>10% 6%</td>
</tr>
<tr>
<td>Rural Markets</td>
<td>Rural Markets</td>
</tr>
<tr>
<td>21%</td>
<td>10% 5%</td>
</tr>
<tr>
<td>Feeder</td>
<td>Feeder</td>
</tr>
<tr>
<td>26%</td>
<td>10% 5%</td>
</tr>
<tr>
<td>Non-served</td>
<td>Non-served</td>
</tr>
<tr>
<td>23%</td>
<td>5% 1%</td>
</tr>
</tbody>
</table>

Percentages based to total respondents

**Region Residents who do not already telework**
- VA Statewide: n = 5,668
- Arlington: n = 434
- Alexandria: n = 453
- Fairfax: n = 421
- Loudoun: n = 430
- Prince William: n = 489
- Charlottesville: n = 221
- Fredericksburg: n = 509
- Richmond: n = 526
- Hampton Roads: n = 543
- NoVA Service: n = 515
- Rural Markets: n = 584
- Suburban MD: n = XXX
- Metro DC: n = XXX
- Feeder: n = 263
- Non-served: n = 280

VASOC Q14e. Would your job responsibilities allow you to work at a location other than your main work place at least occasionally?

VASOC Q14f. Would you be interested in telecommuting on an occasional or regular basis?
43% of Commuters Who Work in Arlington “Could and Would” Telework If Offered the Opportunity

Non-teleworkers who
- Have telework-appropriate job responsibilities
  “Could” 43%

Are interested in teleworking
- Regular
  “Would” 43%
- Occasional
  18%
  25%

Q14e. Would your job responsibilities allow you to work at a location other than your main work place at least occasionally?
Q14f. Would you be interested in telecommuting on an occasional or regular basis?
Key Finding:

22% of Arlington resident commuters are currently teleworking, at least occasionally. An additional 38% of Arlington resident commuters “could and would” telework if allowed to do so by their employers. This was the highest percentage in the state of telework potential among residents. An even higher share of commuters who work in Arlington say they could and would telework. However, Arlington has the lowest percentage of people who telework at least one day a week. So while many are teleworking, they are not doing so very frequently.

Strategic Implication:

Rather than looking at increasing the incidence of telework, it may be useful to first increase the frequency of those who are already doing so by determining and addressing the reasons they are not teleworking more frequently.
“Factors of Success” in Reducing Drive Alone Commuting

Goal: Reducing Drive Alone Commuting

- Market Need
- Rideshare Infrastructure
- Commuter Mindset
- Employer Support & Involvement
- Societal Awareness & Support
- Telework Opportunity

Societal Awareness & Support

Market Need

Rideshare Infrastructure

Commuter Mindset

Employer Support & Involvement

Telework Opportunity

Societal Awareness & Support
Both Ridesharers and Those Driving Alone Among Arlington Residents Said It Is Important to Invest in Transit/TDM

Arlington Residents

CAUTION SMALL SAMPLE SIZES

Drive Alone
n = 53

Ridesharer
n = 36

Excludes those who said “don’t know.”
Question only asked of callback participants

Q56n. How important to you is it that Virginia invests in programs to support (these transportation options) and make them more available to commuters?

Q56r. How important to you is it that Virginia invests in programs to support carpooling, vanpooling and riding the bus and make these transportation options more available to commuters?

VA Statewide Average -
Top 2 Box (those who answered “4” or “5”)

Ridesharers 84%
Drive Alone 81%

84% Drive alone
85% Ridesharers
Arlington Residents who **Drive Alone** Supported Investment in Ridesharing for a Variety of Reasons – Especially Because It Helps Reduce Congestion

<table>
<thead>
<tr>
<th>Reason</th>
<th>Drive Alone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduces congestion</td>
<td>32%</td>
</tr>
<tr>
<td>Good to have</td>
<td>18%</td>
</tr>
<tr>
<td>Helps environment</td>
<td>16%</td>
</tr>
<tr>
<td>Benefits society</td>
<td>12%</td>
</tr>
<tr>
<td>Saves gas</td>
<td>5%</td>
</tr>
<tr>
<td>Helps those without a car</td>
<td>4%</td>
</tr>
</tbody>
</table>

Most frequently mentioned responses are shown.

Q56n. Even though you might not carpool, vanpool or ride the bus, how important to you is it that Virginia invests in programs to support these transportation options and make them more available to commuters? VASOC Q56o. Why do you say that?
Arlington Residents who used Alternative Modes also Cited Reduced Congestion as a Reason for VA to Invest in Rideshare Support

Q56r. How important to you is it that Virginia invests in programs to support carpooling, vanpooling and riding the bus and make these transportation options more available to commuters?

Q56s. Why do you say that?
Arlington Residents Noted Saving Money/Gas, Avoiding Stress/Traffic as Personal Benefits of Ridesharing

Most frequently mentioned responses are shown.

Q56f. What personal benefits do you think people who rideshare receive from using this type of transportation (ridesharing - carpool, vanpool, bus or train)?

Arlington Residents
n = 89

VA Statewide
n = 3530
Those Who Drive Alone Tended to Believe That They Benefited from Reduced Congestion When Others Rideshare; Thus TDM Efforts Are Viewed as a Good Use of Taxpayer Money

Most frequently mentioned responses are shown.

Q56q. Do you feel there are any ways you benefit because other people rideshare?

- Less congestion: Arlington 79% (54%), Statewide 35%
- Cleaner environment: Arlington 23%, Statewide 35%
- No benefits: Arlington 8%, Statewide 25%
- Save energy: Arlington 4%, Statewide 7%
- Sense of community: Arlington 4%, Statewide 0%

CAUTION SMALL SAMPLE SIZE

Arlington Residents n = 53
VA Statewide n = 3029
Reduced Pollution and Congestion Were Most Often Cited as Societal Benefits of Ridesharing by Arlington Residents and Commuters Statewide

Most frequently mentioned responses are shown.

Q56g. How do you think society benefits from ridesharing? That is, what benefit does a community or region receive when people rideshare?

- Reduced Pollution and Congestion Were Most Often Cited as Societal Benefits of Ridesharing by Arlington Residents and Commuters Statewide.

- Less traffic, less congestion: 57% (Arlington) vs. 54% (VA Statewide)
- Reduce air pollution, cleaner environment: 54% (Arlington) vs. 60% (VA Statewide)
- Reduce greenhouse gases: 19% (Arlington) vs. 9% (VA Statewide)
- Save energy: 15% (Arlington) vs. 17% (VA Statewide)

As of entire sample of respondents who were asked benefits questions (but only callback respondents in Arlington):

- Arlington Residents n = 89
- VA Statewide n = 3530
As Gas Prices Fluctuate, So Might the Appeal of Alternative Transportation Modes

Gas prices at the time of this study were between $2.50 and $3.00 per gallon (Virginia average for one gallon of self-serve regular gasoline).

Source: AAA and Oil Price Information Service
Key Finding:

As is true across Virginia, residents commuters in Arlington view the personal benefits of ridesharing slightly differently than the societal benefits. On a personal basis, ridesharers believe a benefit of ridesharing is saving money and gas, and those driving alone say the personal benefit is most likely related to reducing congestion. Reducing pollution is a perceived societal benefit of ridesharing in addition to decreasing traffic and congestion.

Strategic Implication:

The perceived personal benefits of ridesharing may provide the most persuasive messages about ridesharing. Explore the development of messages related to personal benefits, including less traffic and congestion and saving gas and money. Explore how these ideas can be integrated with the criteria that drive mode choices: time to get to work/home and dependability as well as safety and flexibility.
Key Finding:
85% of ridesharers and 84% of those driving alone among Arlington residents support investment, in terms of tax dollars, in transit/TDM. Commuters recognize personal and societal benefits of ridesharing regardless of their mode choice.

Strategic Implication:
There appears to be some market receptivity to transit/TDM in Arlington. Even if they don’t adopt those alternatives immediately, Arlington resident commuters should be receptive to new Transit/TDM initiatives.
Broad TDM Recommendations for the Arlington Market
Important Perspective

Following are recommendations on how to help advance alternatives to the drive alone commute in Arlington County. These recommendations are based solely on the data gathered for the 2007 State of the Commute Study. Insights and related recommendations are not meant to supersede local market knowledge and experience, but rather contribute to the local marketing efforts.
Transit is terrific in Arlington, but still only part of the equation. Transit in Arlington is the dominant alternative mode option. Services such as ridematching and Guaranteed Ride Home and infrastructure such as Park & Ride lots and HOV lanes should be included in Arlington’s well-rounded offering services to encourage carpooling and vanpooling.
Branding is crucial for ACCS right now. Arlington is a prime market for alternative transportation, but commuters need help to convert. It is especially important in an area where market forces make alternative commute modes attractive, that consumers know where to go to find information. Increasing awareness and having a clear message and call to action are paramount to achieving these goals.
3. Commuters in Arlington are exposed to transportation advertising from numerous sources. Acknowledging this and working with those partners will give you more bang for your buck, since you are all working toward the same goal – reduced VMT.
Continuous marketing is important. Commuters make decisions about mode choice when their personal travel needs and opportunities change, thus the need to encourage commuters to consider alternate modes is constant. To convert drive alone commuters to alternate transportation users, messages should focus on what matters most to commuters: efficiency (what time they get to and from work), dependability, safety, and flexibility. Currently, concern for the environment is not the primary reason commuters try ridesharing.
5.

Rather than looking at increasing the incidence of telework, it may be useful to first increase the frequency of those who are already doing so by determining and addressing the reasons they are not teleworking more frequently.
Thank You