


# Georgia Commute Options

## 2019 Regional Commuter Survey




**February 2020**

Atlanta Regional Commission

# INTRODUCTION

The Georgia Commute Options (GCO) program, managed by the Atlanta Regional Commission (ARC), provides Transportation Demand Management (TDM) services for the Atlanta metropolitan region. The central goals of the regional TDM program are to:

- **Increase the use of travel modes other than single-occupant vehicles (SOV);**
- **Keep the Atlanta Region economically competitive; and**
- **Expand travel options and regional accessibility.**

Effective implementation of TDM strategies result in dispersing or decreasing peak period roadway congestion, decreasing the share of SOV trips, reducing vehicle miles traveled (VMT), and reducing emissions from mobile-sources (passenger vehicles and trucks) throughout the region.

The regional TDM program is comprised of seven Transportation Management Associations (TMAs)

- Livable Buckhead,
- Downtown Connects,
- Clifton Corridor TMA,
- Midtown Transportation,
- Perimeter Connects,
- ASAP+ (Atlantic Station), and
- AERO (Airport),

focused on key regional employment centers, and the regional GCO program, which covers participating employers and employees outside the TMA territories, as well as State and Federal employees within the region.

For commuters, the program includes a series of incentive programs for taking alternative modes of transportation along with assistance in finding a carpool, transit pass discounts, and providing a Guaranteed Ride Home if an unexpected event occurs.

For employers, GCO and the TMAs provide assistance through custom-TDM consultation,  explaining tax benefits for commute option programs, and how TDM can translate to cost savings and improved productivity.


# WHY the REGIONAL COMMUTER SURVEY?

**The Regional Commuter Survey (RCS) has been conducted every three to four years since 2007 and was previously conducted in 2007, 2010, and 2014. This iteration of the RCS was conducted in 2018 and 2019 with a pilot survey in 2018 and the main survey in 2019.**

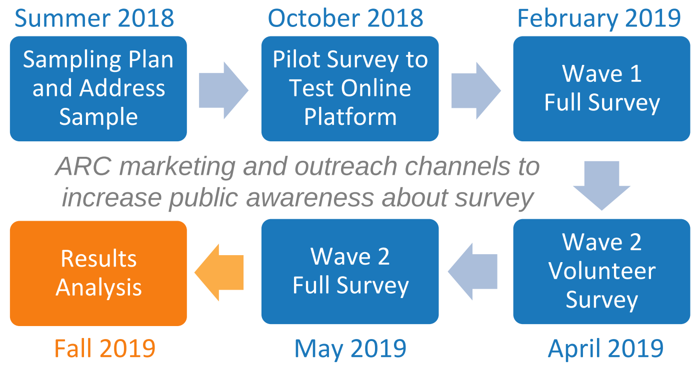
**The RCS serves several purposes:**

**First**, it documents trends in commuting patterns, such as the use of different commute modes and distance traveled, and the use of and prevalent attitudes about transportation services that are available in the region. Wherever possible, questions used in previous RCS surveys were replicated to allow for trend analysis.

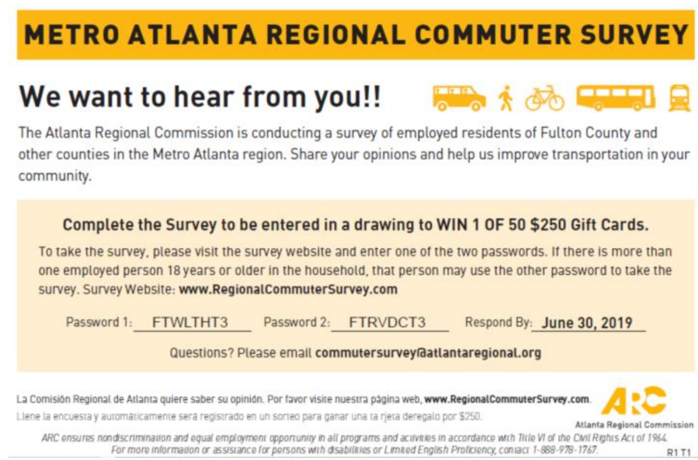
**Second**, the survey examines how commute alternative programs delivered through GCO and the TMAs and marketing efforts might influence commute travel behavior of workers in the region.

**Finally**, the RCS examines the incentives for and barriers to alternative mode use.

This information is used by ARC and the TMAs to better design and deliver TDM marketing, incentives, and promotions to best serve Atlanta region residents and employers. It also helps us evaluate program effectiveness by establishing a baseline and helps transportation planners refine tools that support transportation studies and investment decisions.




**310,000 total postcards were sent out to a random address-based sample of employed residents of 19 counties in the Atlanta Region**


METRO ATLANTA REGIONAL COMMUTER SURVEY

**We want to hear from you!!**

The Atlanta Regional Commission is conducting a survey of employed residents of Fulton County and other counties in the Metro Atlanta region. Share your opinions and help us improve transportation in your community.

**Complete the Survey to be entered in a drawing to WIN 1 OF 50 $250 Gift Cards.**

To take the survey, please visit the survey website and enter one of the two passwords. If there is more than one employed person 18 years or older in the household, that person may use the other password to take the survey. Survey Website: **www.RegionalCommuterSurvey.com**

Password 1: FTWLTHT3 Password 2: FTRVDCT3 Respond By: **June 30, 2019**

Questions? Please email **commutersurvey@atlantaregional.org**

La Comisión Regional de Atlanta quiere saber su opinión. Por favor visite nuestra página web, **www.RegionalCommuterSurvey.com**. Llene la encuesta y automáticamente será registrado en un sorteo para ganar una tarjeta deregalo por $250.

Atlanta Regional Commission

*ARC ensures nondiscrimination and equal employment opportunity in all programs and activities in accordance with Title VI of the Civil Rights Act of 1964. For more information or assistance for persons with disabilities or Limited English Proficiency, contact 1-888-978-1767.*

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## SURVEY RESPONSE AND EXPANSION

**5,100** total responses

| | Total Responses | Percent of Total | Response Rate (Percent) |
|---|---|---|---|
| **Pilot** | 115 | 2.3% | 1.2% |
| **Wave 1** | 2,236 | 43.8% | 1.5% |
| **Wave 2** | 130 | 2.5% | 11.0% |
| **Wave 3** | 2,619 | 51.4% | 1.7% |

**1.6%** response rate

**Approach requires that the survey data be "expanded" to match the actual regional employee distribution**

**Survey results expanded to regional population and employment based on U.S. Census data on population location, age, and race**

**All results reflect the expanded data, so that they accurately represent the regional employee population**

# RESULT HIGHLIGHTS

**76% of weekly commute trips are completed by driving alone**

Commuters used public transit, carpool, vanpool, biking, walking, or on-demand services like Uber or Lyft for about 13% of trips. The remaining 11% of trips are saved through teleworking.

**1 in 3 commuters said their trip to work was more difficult than last year**

98% of commuters agreed that congestion is a serious issue. Trips to some destinations showed almost half of commuters agreeing that commutes are getting more difficult.

**40 minute average commute time to work**

Nearly three in ten commuters traveled 20 minutes or less; a similar share traveled more than 50 minutes.

**2 in 3 commuters said that either the commute length or the ease of the commute was a factor in their home or work location decision**

**41% of Atlanta region commuters teleworked, at least occasionally**

Telework has increased since 2007, when only 22% of commuters teleworked. 80% of non-teleworkers with compatible jobs are willing to telework if their employer had a formal program.

**80% of commuters used mobile devices to access real-time travel or trip information**

70% had used wayfinding or mapping applications, such as Google maps and Waze and 44% used an application for a ride-hail service such as Uber, Lyft, or Via.

**14% of commuters who drive alone stated that they would be able to use transit to get to work occasionally**

Based on current transit routes, 56 percent of these non-transit riders have access. This totals nearly 350,000 regional non-transit riders that could use transit occasionally.

**3 in 10 commuters who recalled transportation messaging took an action to change how they commute**

12 percent of commuters who recalled messages started using public transit, carpool/ vanpool, walk/bike, or telework, representing more than 103,000 commuter's region-wide.

**80% of commuters park for free at their worksite or receive free parking from their employer**

Financial incentives to take alternative modes help, however they typically are not enough to move commuters from driving alone.

**40% of commuters who used alternative modes received at least one commute service**

Commute services include alternative commute information, discounted transit passes, support for vanpools, and Guaranteed Ride Home.

# SURVEY FOCUS AREAS

**The results of the survey are organized in this way in order to best communicate the outcomes.**

## WHERE WE LIVE and WORK

- Trip origins and destinations
- How often do we telework (work at home)
- What is our working schedule

## OUR COMMUTING PATTERNS

- Commute distance and time
- Mode choice and access to alternative modes
- What motivates our choices
- What is getting in the way of change

## HOW WE MAKE COMMUTE DECISIONS

- Factors impacting our commute decisions

## The COMMUTE PROGRAMS WE USE

- Awareness
- Influence
- Participation

## USING the RESULTS

- Impact – Benefits and Potential



The regional travel demand management program recently developed a new performance framework to track the effectiveness of activities implemented by ARC through Georgia Commute Options and by the seven TMAs to reduce single occupant vehicle commuting. The framework tracks performance across the spectrum of **AWARENESS**, **INFLUENCE**, **PARTICIPATION**, and **IMPACT**. Results from the Regional Commuter Survey can help inform how ARC deploys new actions to improve the scope and impact of TDM.

| | | |
|---|---|---|
| A | AWARENESS | Commuter awareness of the regional and TMA-specific commute options programs through marketing and outreach |
| I | INFLUENCE | Employer and property manager engagement with the regional and TMA-specific commute options programs |
| P | PARTICIPATION | Participation in regional and local promotions and incentives that will increase the public awareness and use of alternative modes |
| I | IMPACT | Progress toward SOV travel reduction goals through improved clean commute options and use |

# WHERE WE LIVE and WORK

## Work Trip Destinations

**Work trip destinations in or directly adjacent to the seven TMAs total 41 percent of work trip destinations in the Atlanta region.**
For Fulton and DeKalb counties, 61 percent and 55 percent of commute trips are made to a TMA.

## Work Trip Origins

**The five core counties (Fulton, Gwinnett, Cobb, DeKalb, and Clayton) account for seven in ten origin or home counties for all regional commuters.**
There is a lot of geographic affinity between home and work locations. For example, for respondents living in Clayton County or the SE and SW regions, more commuters stay within or travel to Clayton County, the SE and SW region or the AERO TMA, compared to all other TMAs, counties, and regions. Similarly, for respondents living in Fulton County, 56 percent commute within Fulton County or to TMAs within Fulton County (Downtown, Midtown, Buckhead).

## More of Us Are Working at Home

**Around 40 percent of commuters telework.**
For the commuters who telework, 11 percent telework five or more days per week and 20 percent telework once a week.

While the number of teleworkers has increased by 83 percent since 2007, the share of teleworkers who do so full time peaked in 2014 and has declined since. This indicates that while more people are teleworking, on average, they are doing so less frequently.

**Average Telework Frequency for Teleworkers**

| Telework Days | 2019 | 2014 | 2010 | 2007 |
|---|---|---|---|---|
| Less than one time per month | 17% | 13% | 13% | 15% |
| 1-3 times per month | 27% | 23% | 29% | 24% |
| 1-2 days per week | 35% | 26% | 30% | 37% |
| 3-4 days per week | 10% | 11% | 9% | 14% |
| 5 or more days per week | 11% | 26% | 17% | 10% |

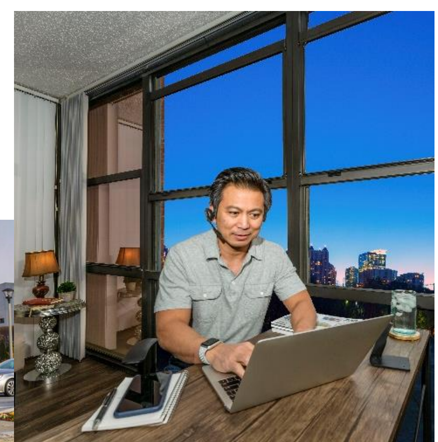
## Most of Us Report to a Local Office and Work a Standard Work Week

**95 percent of commuters typically report to an employer located in the Atlanta region daily.**
80 percent of these commuters work a standard five days per week. Nine percent work part time, while the remaining 11 percent work a different combination of hours within a compressed work week (for example 4 days/40 hours or nine days/80 hours).

### Key Finding: Teleworking

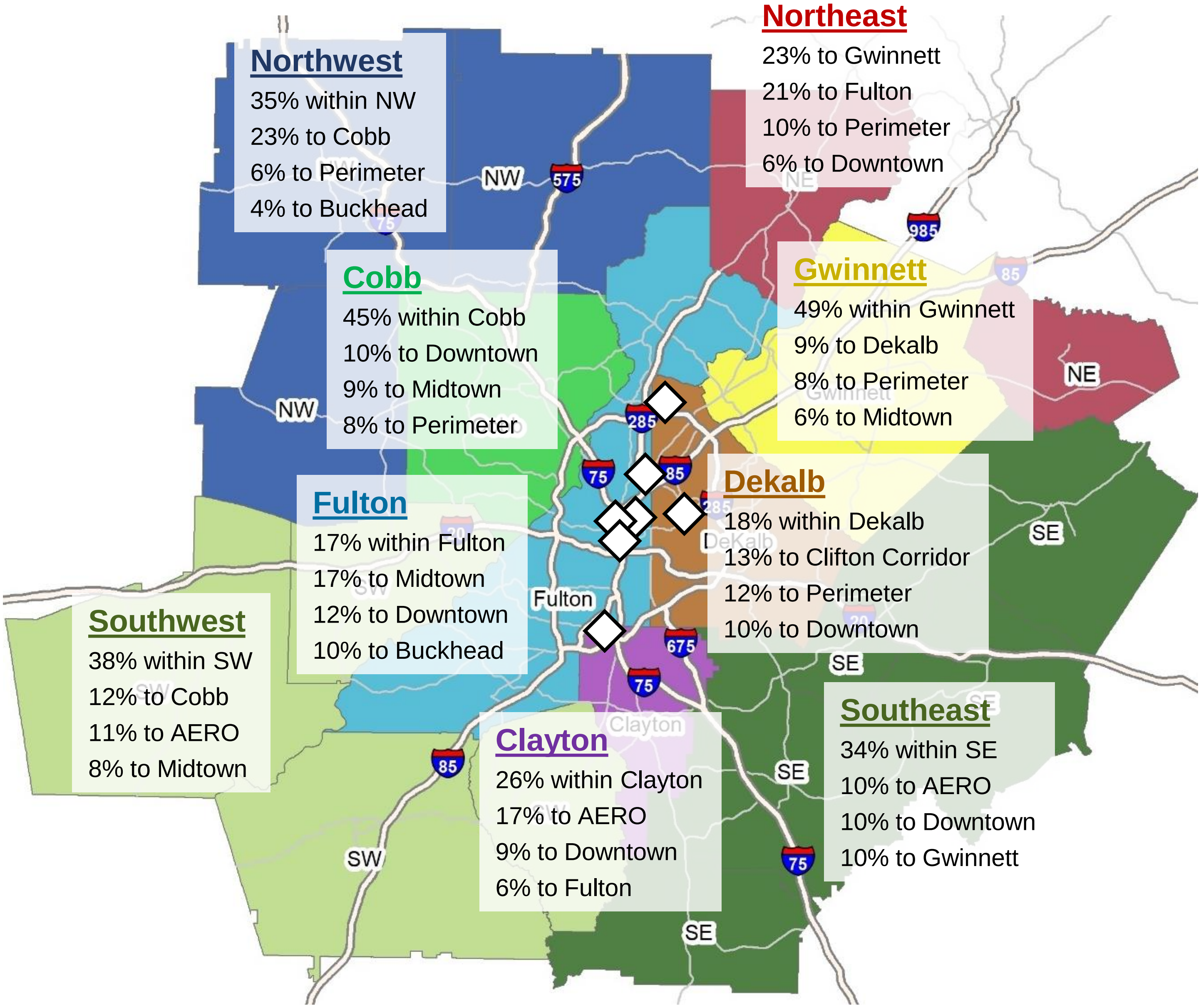
Having a formal program influences participation in teleworking. Among respondents who telework, 43 percent reported having a formal telework program. Among respondents who did not telework, eight percent reported having a formal telework program.

Among respondents who did not telework, 77 percent reported that a telework program did not exist or that telework was prohibited. For these current non-teleworkers, for those with compatible jobs, 80 percent stated that they would be interested in teleworking if a formal program was offered by their employer or an informal arrangement could be reached with their supervisor.



# WHERE WE LIVE and WORK

## The Trips We Make the Most From Home




## Where Trips are Coming From in the TMAs

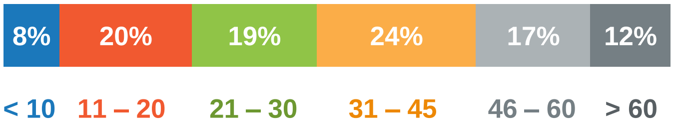
| AERO Airport Employee Ride Options | Downtown Connects | Clifton Corridor Transportation Management Association CCTMA | Livable Buckhead | Midtown Transportation | Perimeter Connects |
|---|---|---|---|---|---|
| **25%** Fulton | **27%** Fulton | **39%** Dekalb | **34%** Fulton | **37%** Fulton | **23%** Dekalb |
| **36%** SE and SW | **17%** Cobb | **20%** Fulton | **18%** Dekalb | **16%** Dekalb | **22%** Fulton |
| **15%** Clayton | **16%** Dekalb | **15%** Gwinnett | **15%** Cobb | **15%** Cobb | **16%** Gwinnett |

# OUR COMMUTING PATTERNS

## Commute Distance and Time

**40 minutes**

**The average time commuters spend traveling to work each day**



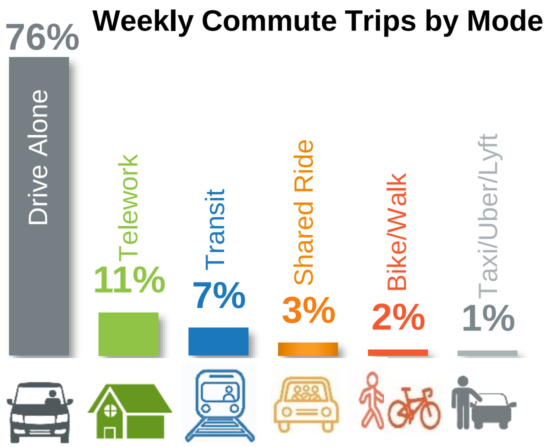

**% of trips by commute time (minutes)**

**19 miles**

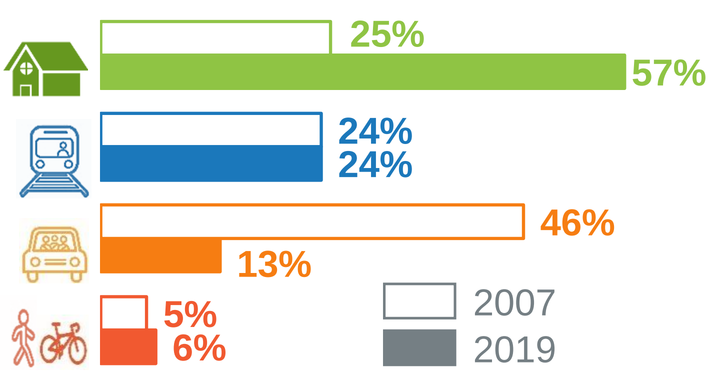
**The average distance between home and work for commute trips**

## Mode Choice

**Most of us commute to work by driving alone.** Commuters drove alone to work on 76 percent of their total trips to and from work.



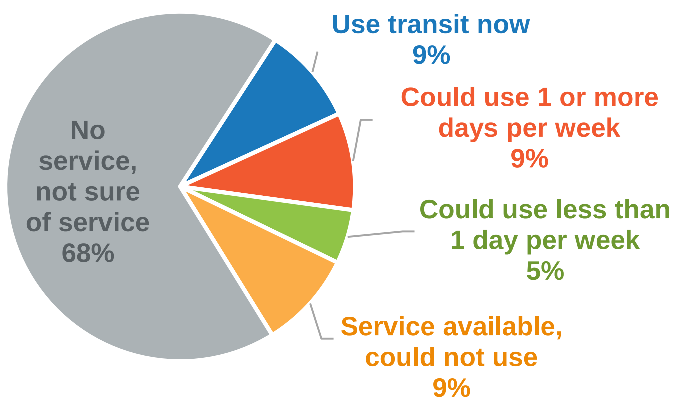

During an average work week, 66 percent of commuters only drive alone. For the other 34 percent, the chart below presents the most frequent alternative mode used, comparing 2007 to 2019. Telework has increased while shared ride has decreased.




## Access to Alternative Modes

**Ease of access to the alternative mode is a critical factor in trip decisions.** In the core counties (Fulton, Dekalb, Cobb, Clayton, Gwinnett), more people walk or are picked up at home by a carpool/vanpool than drive alone to a park & ride lot or a bus/train station. For the non-core counties, most commuters drive alone to a park & ride lot or to a bus/train station.

Availability of an alternative mode has a mixed relationship to more frequent use of that mode. At the time of the survey, 9 percent of respondents were using a bus or train to get to work at least one day per week. Another 9 percent of respondents, who were not riding transit to get to work, said they knew of a bus or train service available for their commute and would be able to use that service at least one day per week. An additional 5 percent of respondents said they could use transit occasionally to get to work. **These transit-potential-respondents represented nearly 350,000 commuters across the Atlanta region.**




### Key Finding – Transit Potential

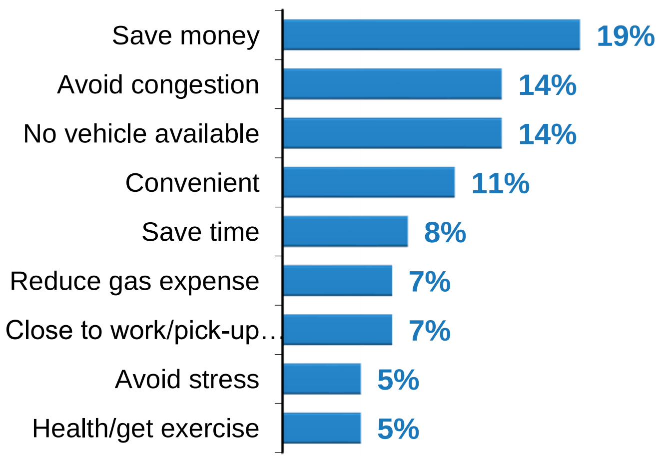
Potential overall use of transit varied by age, with younger commuters having higher rates of both current and potential transit use than older commuters.

More than one-quarter of respondents who were between 18 and 34 years of age reported current or potential transit use (26 percent total – 11 percent current, 15 percent potential). Respondents who were 65 or older reported lower current transit use (5 percent) and lower potential transit use (10 percent).

# OUR COMMUTING PATTERNS

## What Motivates our Choices?

**Commuters who used alternative modes were motivated by the potential to save money and avoid congestion.**
Commuters chose alternative modes because these options fit their commute circumstances and provided personal benefits. When you include saving time and reducing gas expense in the category of saving money, this factor is highest in terms of personal choice. Other key motivating factors include avoiding congestion, convenience, or simply not owning a vehicle.




**Alternative mode commuters also were motivated by access to commute services, particularly those that reduce cost.**
More than four in ten respondents who used alternative modes had received at least one regional or local commute assistance service. The most common services cited in order of significance included a transit subsidy or discounted transit pass, help finding a carpool or vanpool partner, Guaranteed Ride Home, shuttle bus to a transit station/stop, or transit route or schedule information

### Key Finding – Financial Incentives

Many commuters who drove alone said a financial incentive would influence them to consider using an alternative mode.  Nearly half of respondents who were driving alone said a $5 per day incentive would motivate them to start using an alternative mode, even if the incentive ended after 30 days. More than four in ten would be influenced to try carpooling by a monthly gas card given to the carpool members and 34 percent would be influenced to try transit by a discounted monthly transit pass.

## What is Getting in the Way of Change?

**The overwhelming barrier to greater transit use was the time it would take to commute.**
60 percent of non-transit users who had access to transit and said they could use it, did not ride transit because their commute trip would take too long. Other key barriers included difficulty getting to transit; incompatible transit schedules; and distance from transit to home or work. Transit cost was a minor barrier; only 8 percent of non-riders mentioned this as a reason not to use transit for commuting.

**One in five commuters (20 percent) indicated that they could carpool or vanpool given their current work situation.**
Carpool/vanpool use could increase substantially with the right motivation. About 5 percent of commuters either carpooled or vanpooled to work at least one day per week at the time of the survey. Of the two-thirds who stated they could not carpool or vanpool, just under half stated work schedule compatibility as the primary barrier.

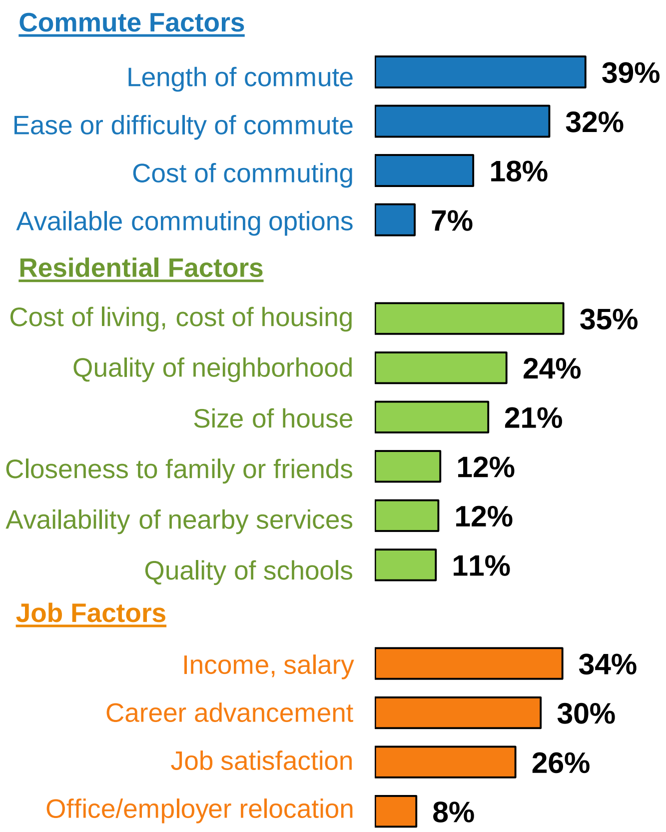
**Despite program benefits, most commuters agree that their commute has remained the same or become more difficult over the past two years.**
8 out of 10 commuters felt that, compared to a year ago, their trip to work was about the same or had become more difficult, with 36 percent citing construction as a primary reason. Only 13 percent of respondents found their commute to be easier. Less than ten percent of respondents found the commute easier due to alternatives such as carpooling or vanpooling to work, using transit, walk or bike, and teleworking more.

# HOW WE MAKE COMMUTE DECISIONS

## Factors Impacting Our Commute Decisions

**Our choices for home and work location are greatly impacted by commute length, but not access to commute options.**
29 percent of survey respondents changed either home, work or both locations over the last year. Among the reasons to change home and/or work location, the most cited reason was length of commute, followed by cost of living/housing, and changes in income and salary.

Only 7 percent of respondents mentioned the availability of commuting options as a factor in changing home and/or work location.

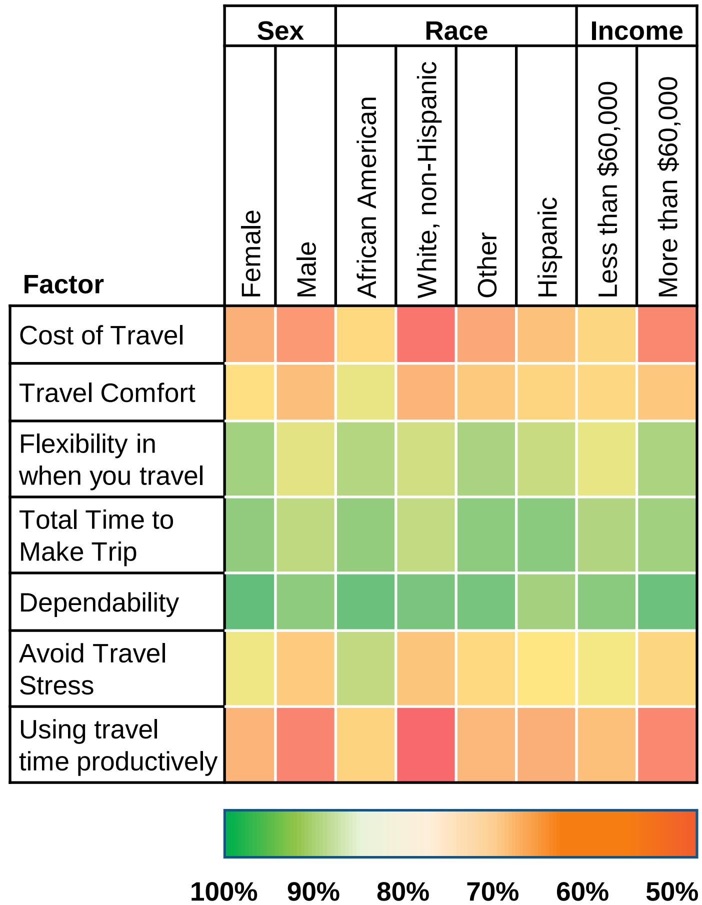



**Nearly all respondents perceive traffic congestion and air quality to be serious problems.**
20 percent more people considered traffic congestion to be a serious problem compared to air quality.

**Most commuters agree that their commute has remainder the same or become more difficult over the past two years.**
8 out of 10 commuters felt that compared to a year ago, their trip to work was about the same or had become more difficult.

**The decision on travel modes for commuting are complex and unique to everyone's commute experience and work and home realities.**
Age, race, and income all show unique perspectives.

**Agreement with Different Factors Impacting Commute Decisions**




- There is most consistency on travel mode decisions across age, race, and income as it relates to travel flexibility, travel time, and dependability
- There is most inconsistency regarding cost of travel and using travel time productively

### Key Finding – Travel Decisions

In considering travel attributes that are important to choosing the mode of transportation used to get to work, the dependability of transportation mode was extremely important to survey respondents, while travel time and travel cost were less important.

# The COMMUTE PROGRAMS WE USE

## A AWARENESS

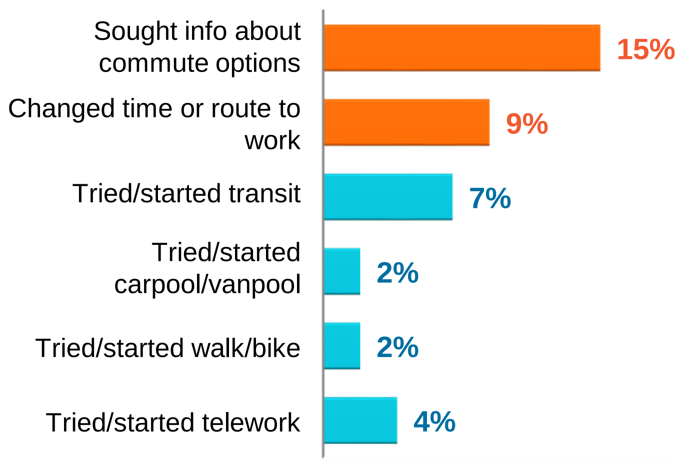
**30%** recalled messages on transportation **15%** knew of GCO **14%** knew of the TMA they worked in

### Awareness of Commute Information

**One third of commuters recalled hearing messages and reports about transportation.**
The most common messages related to reports about transportation infrastructure, appeals to use alternative modes, and information about commute resources.

**Of the commuters that recalled messages, 15 percent tried or started using one or more alternative modes.**
These commuters represent more than 103,000 commuter's region-wide. The chart below presents the share of these commuters that took travel change actions.

**Travel Change Actions Taken**




**Traditional media sources and digital media were common sources for transportation information.**
Nearly 50 percent of commuters who saw or heard ads said they heard transportation messages on the radio, 31 percent heard or saw them on television, and 21 percent saw them on a billboard.

**Key Finding**

Social media is increasingly used as a main source of information about commute options: 28 percent of commuters mentioned this source in 2019, compared with only 1 percent in 2014). Nearly nine in ten (87 percent) of all commuters said they had an account with at least one of the six social media applications.

### Awareness of Regional TDM Programs

**Commuters in the Atlanta region have access to many organizations and services that help with finding travel options for commuting, but many respondents were not aware of them.**
When asked about such organizations, without naming any organization names, 35 percent of commuters said they knew such an organization existed.

**About 15 percent of regional commuters knew of Georgia Commute Options (GCO) and 4 percent had used a GCO service.**
For those that used a service, the top GCO service used is information on commute options, followed by the "Gimme Five" rewards program, which offered $5 for each day (up to $150 total) that a drive alone commuters switched to an alternative mode.

### Awareness of the TMA TDM Programs

**Overall, about 14 percent of commuters to TMA areas had heard of the organization that served their work area and 12 percent who knew of the organization had used its services.** The top TMA service used was information on the variety of transportation options the commuter could use to reach that employment area.

### Financial Incentives

**16 percent of commuters had heard of financial incentives for using alternative modes.**
GCO offers and TMAs promote several financial incentives to encourage commuters to start using alternative modes for commuting. The most widely-known was the regional Guaranteed Ride Home program, which provides a taxi or TNC ride home to alternative mode users who have an emergency during the workday.

**Six percent of all regional commuters had participated in one of the GCO incentives, with 2 percent currently participating and 4 percent previously participating.**

# The COMMUTE PROGRAMS WE USE

| | | | | | | |
|---|---|---|---|---|---|---|
| I INFLUENCE | 79% | Of parking at work is free | 60% | Of employers offer a commute benefit | 17% | Offer transit subsidies |
| P PARTICIPATION | 4% | Used a GCO service | 12% | Of commuters to a TMA used a TMA service | 6% | Participated in a financial incentive |

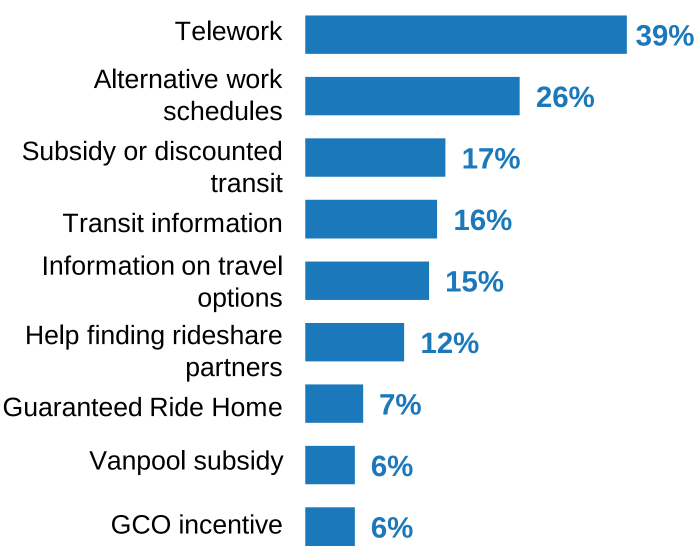
## Employer Commute Assistance

Awareness of a program does not necessarily translate to participation. There are many other ingredients required to shift commuting behavior. The survey showed a notable gap between awareness and participation with commute alternatives.

**Nearly 60 percent of commuters said their employer offered one or more commute assistance services to employees.**
72 percent of commuters who worked in a TMA area said they had access to commute services. Among commuters who worked in an area not served by a TMA, 46 percent had commute services at work.

**Telework was the most common alternative commute service offered by employers.**
After telework, the other common services include alternative work schedules, transit subsidies, transit route and schedule information, and help finding carpool and vanpool partners.

**Alternative Commute Services Offered by Employers**



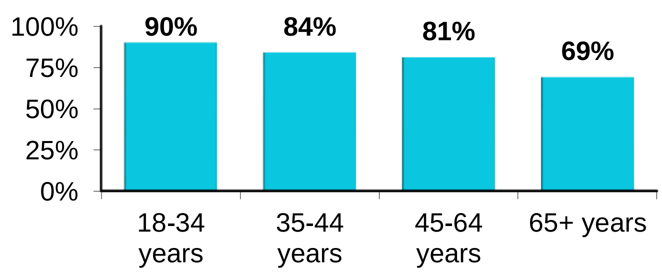

## Participation in Services and Incentives

There are several critical factors influencing the gap between awareness and participation.

**The abundance of free parking makes it much more difficult to drive commute behavior change, even with employer commute programs in place.**
79 percent of commuters said their employers offered free parking to all employees and 3 percent of respondents said their employers did not provide free parking to all employees, but that they personally had free parking. Free parking is one of the most critical influencers impacting TDM program implementation.

**Access to real-time, reliable information is critical for successful participation with alternative modes.**
Young respondents and those who lived and/or worked in the core of the region were the most active users of travel/trip information applications. This likely is related to the age profiles of each area, but also to the wide availability of services such as ride-hailing and transit schedule information, that were the subject of some of the apps.

**Use of Travel/Trip Information Apps**




### Key Finding – Participation

Extenuating circumstances compound challenges with participation. 22 percent of respondents cited childcare or other schedule constraints as a limitation for participation. 11 percent said they didn't need the incentive or that it did not apply to their personal travel situation. Four percent could not use an alternative mode because they needed a car for work.

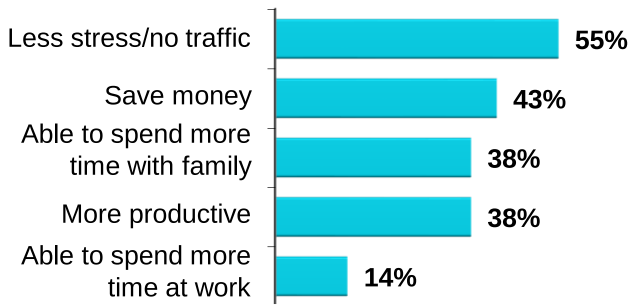
# USING The RESULTS

## I IMPACT

### Commuter Benefits

**More than half of survey respondents indicated that the greatest benefit from using an alternative mode was less stress.** Saving money, spending more time with family, and being more productive are other important benefits.

**Share of Respondents Identifying a Benefit from Using Alternative Modes**




### Key Finding – Motivations for and Benefits of Changing Commuting Behavior

The availability of commute services and financial benefits on their own are only moderately motivating for commuters to change their commute behavior. There are many other factors driving commuting decisions, some of which TDM programs cannot control for.

Interestingly, while respondents identified saving money as the top motivator to choose an alternative mode, they noted less stress as the primary benefit.


### Alternative Mode Potential

**Many commuters are interested in using alternative modes more frequently.** The survey asked respondents questions regarding the potential for using alternative modes, to determine how many commuters that could take these modes.

**80 percent**

Of current non-teleworkers who have a compatible job would be interested in regularly teleworking if their employer offered a formal program. **This totals over 470,000 new regular teleworkers in the Atlanta region.**

**14 percent**

Of current non-transit riders can ride transit to work, including 9 percent able to ride at least once a week. **This totals nearly 350,000 non-transit riders who could use transit to commute to work occasionally.**

**21 percent**

Of respondents who did not rideshare said they would be able to carpool or vanpool occasionally.

### Key Finding

While the potential for behavior change appears substantial based on the survey, there are barriers to overcome. For example:

- 75 percent of non-transit riders indicated that they did not have access to transit for their commute trip
- 11 percent have transit access but stated that their work schedule could not accommodate a transit trip
- Nearly 80 percent of employers provide free parking, meaning that in most cases there is no disincentive to driving alone