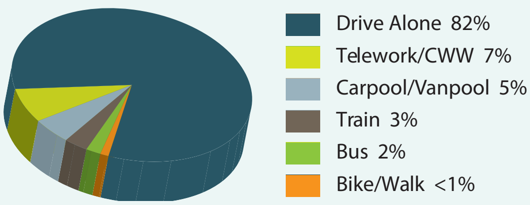
Photos courtesy of The Clean Air Campaign.

Survey Highlights

Commute Characteristics

- Atlanta's commuters travel an average of
- 17.5 miles one-way to work.
- The average one-way travel time is 30
- minutes.
- The majority of commuters (82%) primarily drive alone to work.

Distribution of Primary Modes
n=3,789



Telework

- 27% of respondents telework on a regular or occasional basis, a substantial increase compared to the 20% observed in the 2007 Regional Survey. Of those who telework, 28% indicated they are teleworking more frequently than one year ago.

Changes in Commute

- 17% of respondents reported a more difficult commute compared to one year ago and 14% said they have had an easier commute. The remaining 69% reported their commute has been about the same. In 2007, 37% of respondents reported a more difficult commute.

Motivations for Using Alternative Modes

- Commuters who primarily use drive alone to work indicated "a pre-tax payroll deduction that cuts costs to vanpool or ride transit" would influence them most from a list of various commuter services to start or increase their use of commute alternatives.

Awareness of Commute Programs

- 38% of respondents recalled seeing or hearing messages about transportation services in 2010. Of this group, 10% subsequently sought additional information or changed their commute behavior.
- 83% of respondents were aware of The Clean Air Campaign (CAC). Of these, 9% reported use of CAC services in 2010.

2010 Atlanta Regional Commuter Survey

Overview

The Georgia Department of Transportation (GDOT), in cooperation with the U.S. Department of Transportation, sponsors the evaluation of Atlanta Transportation Demand Management (TDM) programs. TDM programs are designed to reduce reliance on single-occupant vehicles for travel and thereby reduce congestion and improve air quality. TDM programs facilitate and encourage use of non-drive alone "shared ride" travel options such as carpooling, vanpooling, and public transit. The programs also encourage and support use of non-motorized transportation options, such as biking or walking. TDM alternatives such as telework, compressed work weeks, and alternative work schedules enable commuters to avoid a trip entirely or shift the time the trip is made to a less congested time of day.

In addition to periodic assessments of regional TDM programs, the Center for Transportation and the Environment (CTE) conducts the Regional Commuter Survey of the employed population in the Atlanta nonattainment area. CTE uses the Regional Commuter Survey as the primary tool to assess general trends in awareness, attitudes, and use of alternative forms of transportation for commuting among residents in the metropolitan Atlanta region. This report presents highlights from the Regional Commuter Survey CTE conducted in August and September of 2010.

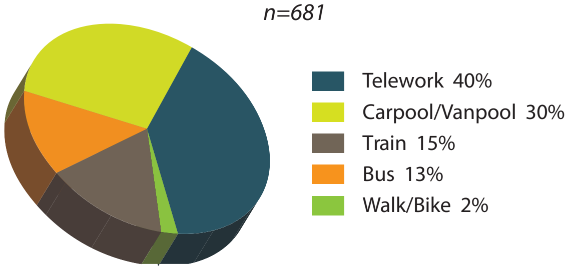
CTE will also prepare the 2010 Regional Commuter Survey Technical Report that will include more detailed data analysis as well as conclusions and recommendations based on the survey findings.

The 2010 Regional Commuter Survey included 4,048 responses and represented a margin of error of +/-1.5% at a confidence level of 95%. CTE conducted previous Regional Commuter Surveys in 2002 and 2007. When appropriate, comparisons to the previous survey findings are presented.

Current Commute Characteristics

Atlanta's commuters travel an average of 17.5 miles one-way to work. The average one-way commute is 30 minutes. The majority of commuters (82%) primarily drive alone to work. The remaining 18% of commuters primarily use an alternative mode. Of this 18% of primary alternative mode users, 40% telework, 30% carpool/vanpool, 15% ride the train, 13% use a commuter or local bus, and 2% walk or bike.

Distribution of Primary Alternative Mode Users
n=681



Average Size of Carpools and Vanpools

The average carpool is made up of 2.3 people. Approximately half of carpools (51%) include a coworker, 49% include a family member, and only 5% include neither[1]. The majority of carpoolers (81%) ride in a two-person carpool. Of those who carpool, only 3% used a ridematch service to find their carpool partner. The average vanpool is made up of 8.7 people. Nearly half of respondents (49%) state their employer helped them find their vanpool and 21% indicated they received vanpool assistance from The Clean Air Campaign (CAC).

More than one-third (36%) of current two-person carpoolers indicated that a $40 per month incentive would have a very strong influence on them to add a third rider to their carpool, and 27% indicated the incentive would have no influence.

Telework and Alternative Work Schedules

Current Use of Telework and Alternative Work Schedules

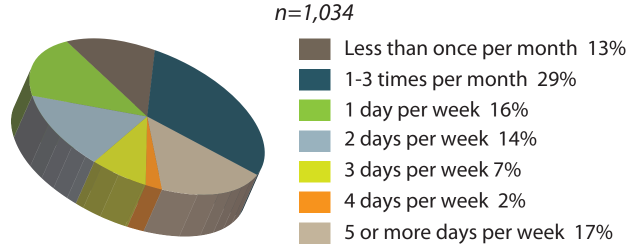
The majority of respondents (84%) reported working full-time while 16% reported part-time employment. Of the respondents working full-time, 94% work a standard five-day week[2]. The remaining 6% work one of several compressed work schedules: 4 days/40 hours schedule (3%), 3 days/36 hours schedule (1%), or 9 days/80 hours schedule (2%).

More than one-quarter of respondents (27%) telework (work at home or a location other than their worksite during regular business hours) at least occasionally. ***In the 2007 survey, only 20% of respondents reported teleworking, revealing a 35% increase in telework usage over the past three years.***

Of the 27% of 2010 respondents who telework, 16% do so one day per week and 14% do so two days per week. Nearly one-third of teleworkers (29%) do so one to three times a month, while 13% telework less than once a month. Small percentages of the population telework three days per week (7%) or four days per week (2%).

Nearly one-fifth of teleworkers (17%) use the mode five or more days per week. ***In 2007, only 10% of teleworkers reported doing so five or more days per week. In summary, 5% of the 2010 full-time employed population teleworks five or more days per week compared to what was only 2% of the population in 2007, an increase of 130% since that time.***

Frequency of Telework Use
n=1,034



Of the 27% of respondents who currently telework, almost half (41%) reported a change in the frequency of teleworking from one year ago. Thirteen percent indicated that they are teleworking less than one year ago and 28% indicated they are teleworking more.

Potential for Telework

About one-quarter of respondents (22%) who do not currently telework reported that their job responsibilities would be conducive to teleworking and 70% of these respondents said they

[1] *This question allowed for multiple responses and results add to more than 100%.*
[2] *Full-time employees who telework every day were not asked if they work a standard or non-standard schedule.*

would like to telework. ***This pool of potential teleworkers represents 11% of the full-time employed population.***

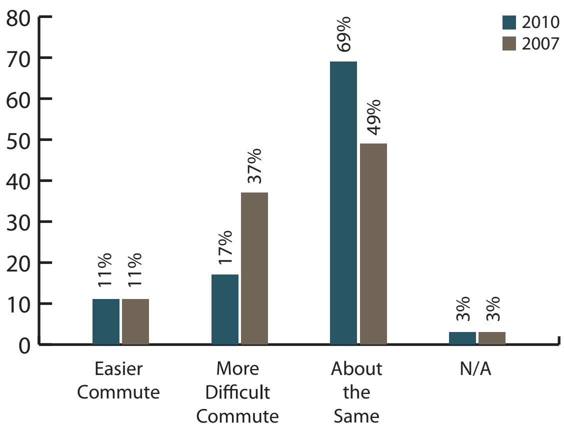
Four in ten of these potential teleworkers (45%) reported they could telework between one to two days per week and 39% said they could telework three or more days per week. A smaller portion (16%) reported they could telework on an occasional basis (one to three days per month or less than once a month).

Respondents who have telework-appropriate jobs but who reported little interest in teleworking cited various reasons for not wanting to telework. More than half (55%) said they need to be available to their employer and other employees. Another 17% indicated they did not like or were unable to work at home.

Changes in Commute Over the Past Year

About one in ten respondents (11%) reported their commute is easier now than it was one year ago and 17% said their commute is now more difficult. The majority of respondents (69%) reported their commute has not changed.

Perceptions of Commute Changes Compared to One Year Earlier
(2007 n=953, 2010 n =1,002)



The same percentage of respondents reported an easier commute in 2010 compared to one year ago as in 2007. ***However, significantly <u>fewer</u> 2010 respondents reported a more difficult commute compared to a year ago (17%) than in 2007 (37%).*** More respondents believed their commute is about the same as a year ago (69%) than in 2007 (49%).

Respondents who considered their commute easier most often cited a less congested route (41%) or a shorter distance (26%) as the reason. In 2007, these were also the top two reasons, but in reverse order; 46% reported a shorter distance and 25% said the route was less congested.

Respondents who said their commute was now more difficult primarily reported more congestion (71%). In 2007, 82% of the respondents who reported a more difficult commute cited more congestion. In 2010, longer travel distance (12%) and construction (9%) were the second and third most cited reasons for a more difficult commute.

Motivations For Using a Commute Alternative

Potential for Alternative Mode Use

More than one in five respondents (21%) reported bus or train services are available to them but they do not use these modes, the same percentage as in 2007. Of these respondents, 54% said they might be able to use the bus and/or train one or more days per week and 39% said they could never use these transit modes. The top reason these respondents gave for why they do not use transit is that it would take too long, cited by 20% in regards to express bus, 38% for local bus and 31% for train. These respondents also cited incompatible schedules as a reason for not using transit (18% for express bus, 15% for local bus, and 12% for train). One-quarter of these respondents (25%) indicated that they do not use the train because the station is not close enough to their work and/or home.

Nearly one-quarter of respondents (24%) that does not currently carpool or vanpool said they might be able to use one of these modes one or more days per week. Another 7% reported they might be able to use these modes less than one day per week and 69% indicated they could never use them.

The top reason these respondents gave for why they do not use carpool and/or vanpool is incompatibility with their work schedules (36%) and that they were unable to find rideshare partners (36%).

Importance of Travel Attributes

When asked to rate the importance of key travel attributes in their commute mode decision, dependability was rated highest, considered extremely important by 78% of respondents. Safety (77%), flexibility (56%), travel time (48%), and cost (45%) were the next highest rated attributes. Use of travel time productively had the lowest average score, considered extremely important by 38% of respondents.

Importance of Commuter Services

Commuters who primarily drive alone to work indicated "a pre-tax payroll deduction that cuts costs to vanpool or ride transit" would influence them most from a list of various commuter services to start or increase their use of commute alternatives. About one-quarter of respondents (29%) said the pre-tax deduction would have a "great influence". A $3 per day incentive to switch to an alternative mode had the second highest rating, considered highly influential by 28% of respondents. Priority, reserved parking at work for carpools and vanpools had the lowest rating, cited as highly influential by only 16% of respondents.

New Alternative Mode Users

Nearly one-third of the respondents (31%) who primarily use motorized alternative modes such as transit or carpooling had been using this mode for less than one year. Of these new users, 59% were new carpoolers and 35% were new transit users. One-quarter of these new users (25%) indicated that saving money was their primary motivation for alternative mode use, and an additional 11% of respondents specifically cited a reduction in gas expense.

Reasons for Discontinuing Alternative Mode

Nearly one-quarter of respondents (24%) indicated they tried using an alternative mode in the past year but were no longer using the mode. More than half of these respondents (57%) tried a compressed schedule or telework only and 43% indicated they tried an alternative motorized commute mode such as transit or carpooling. The top reasons respondents gave for discontinuing the mode were job changes (23%), followed by ending of temporary need (21%), and other circumstantial changes (15%). Another 15% indicated the mode took too much time and 8% said they lost their carpool partner.

Air Quality and Traffic Congestion Attitudes

The majority of respondents (90%) either agreed or strongly agreed with the statement that "air quality is a serious problem in the Atlanta area." This is an increase from the 2007 survey when 83% of respondents agreed or strongly agreed with the statement. Nearly all survey respondents (98%) agreed or strongly agreed with the statement that "traffic congestion is a serious problem in the Atlanta area." This compares to 97% in 2007.

Awareness of Regional Commute Programs and Services

Message Recalled

More than one-third of respondents (38%) recalled seeing or hearing advertisements or news reports about transportation services that could assist them with their commutes. Four in ten (40%) of these respondents recalled general messages that encourage commute alternative use, and/or mentioned availability of commuter services. Another 13% recalled messages specifically about financial incentive programs. More than one-third (37%) reported messaging related to public transit in the region such as messages encouraging them to contact MARTA and other train/bus operators.

Ten percent of respondents who recalled specific advertisements or news reports about transportation services took subsequent action to change how they traveled around the Atlanta region. The largest percentage of this population tried, started, or increased their use of commute alternatives, such as carpooling or teleworking (40%). Another 37% of respondents sought more travel information from formal or informal sources.

Awareness of Regional Programs

About one-third of respondents (35%) reported they knew of a service, phone number, or website in the Atlanta area that helps commuters find carpool or vanpool partners. Slightly more respondents, 40%, reported knowledge of a program in the region that offers financial incentives to commuters who carpool, vanpool, ride a train or bus, or walk or bicycle to work.

When asked about the organization by name, 83% of respondents said they knew of The Clean Air Campaign (CAC). When these respondents were asked about the services provided by CAC, 25% said CAC helps in finding a ridematch partner, 14% said CAC provides incentives, and 6% reported CAC provides other commute services. Of the 83% who knew of CAC, 39% could not recall the type of services they provide. When asked if they knew of other commuter service organizations by name, 28% knew of RideSmart, and 2% knew of a TMA partner.

Five percent of respondents had used a commuter service from CAC, RideSmart, or a TMA in the past year. Of those who had used the services, 20% took subsequent action; 16% increased their use of an alternative mode, 2% changed their route or commute time, and 1% sought more information.

Employer Services

Of respondents who were not self-employed, nearly two-thirds (60%) reported their employer provides TDM services. Of the 60% whose employer offers TDM services, more than half (53%) reported they had used the available services. The majority of these respondents (93%) reported benefiting from the services offered by their employers.