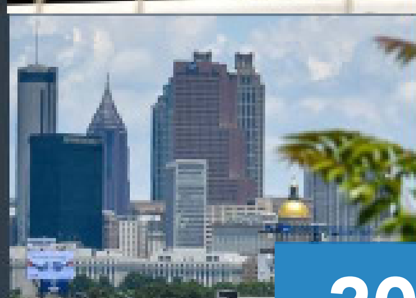
GEORGIA**COMMUTE**OPTIONS



2025

REGIONAL COMMUTER SURVEY SUMMARY REPORT

PREPARED FOR:

Atlanta Regional Commission

Georgia Department of Transportation

Atlanta Regional Commission & Georgia Department of Transportation


W Howard Ave
E College Ave
W College Ave
RIGHT LANE MUST TURN RIGHT
R R
RIGHT TURN ONLY

Introduction

The Georgia Commute Options (GCO) program – managed by the Atlanta Regional Commission (ARC) in partnership with The Georgia Department of Transportation – provides Transportation Demand Management (TDM) services for the 20-County Atlanta metropolitan region. GCO, along with six local Transportation Management Associations (TMAs), comprise the Atlanta Regional TDM Program, the central goals of which 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.

Georgia Commute Options Coverage Area

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 passenger vehicles and trucks throughout the region.

The six TMAs are:

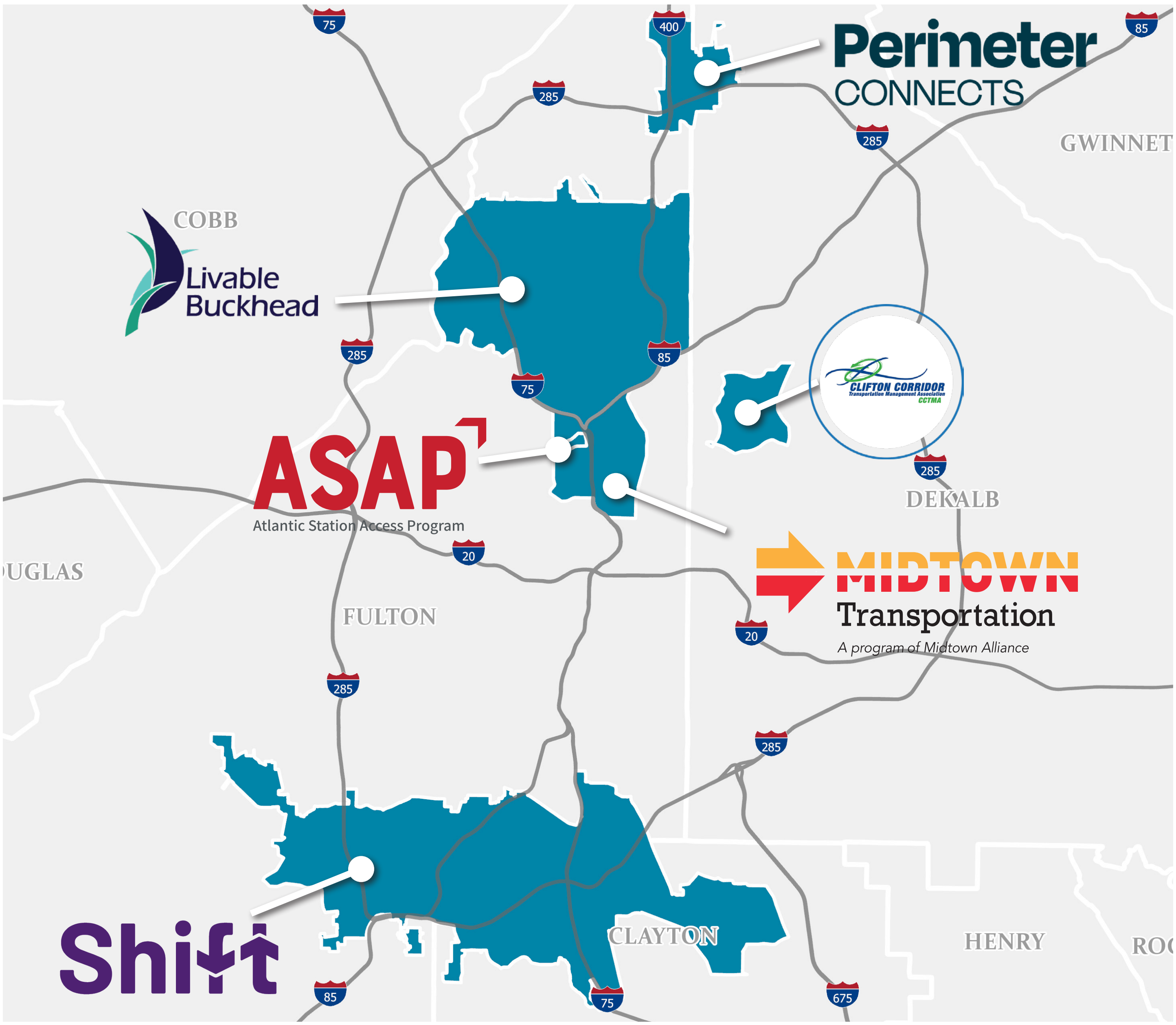
- ASAP (Atlantic Station)
- Clifton Corridor TMA
- Livable Buckhead
- Midtown Transportation
- Perimeter Connects
- Shift (Airport)

The TMAs focus on key regional employment centers in the core of the region, while GCO covers participating employers and employees outside the TMA territories, as well as State and Federal employees within the 20-county region.

For commuters, the program includes various recurring and one-time incentive programs for using alternative commute modes, along with limited time modal promotions, assistance in finding a carpool or vanpool, and a Guaranteed Ride Home program to cover a ride home in case of an unexpected event.

For employers, property managers, and community organizations, GCO and the TMAs provide assistance through custom-TDM consultation, helping partners develop a TDM program that meets the unique commuting needs of their workforce or constituents.

Transportation Management Association Territories



Overview of the Regional Commuter Survey

The Regional Commuter Survey (RCS) is conducted every three to five years as part of the Georgia Commute Options Program (GCO) – run by The Atlanta Regional Commission (ARC) in partnership with The Georgia Department of Transportation (GDOT) – and serves as a cornerstone of the Atlanta Regional Transportation Demand Management (TDM) Program, providing critical insights into how employed residents of the 20-county Atlanta region travel to work and how these patterns evolve over time.

The key objectives of the RCS are to:

- Document current commute patterns, including mode shares, trip distances, and prevalence of hybrid and remote work;
- Assess awareness, perceptions, and the use of TDM programs and services offered by ARC, local TMAs, and employers;
- Identify barriers to and motivating factors for alternative-mode use; and
- Provide statistically robust data to evaluate TDM program effectiveness and inform future planning, policy development, and marketing efforts.

Ultimately, the RCS serves as an empirical foundation for understanding how commuting behaviors and attitudes evolve over time, helping ARC and its partners refine and target TDM strategies that promote sustainable, equitable, and efficient travel choices throughout the Atlanta region.

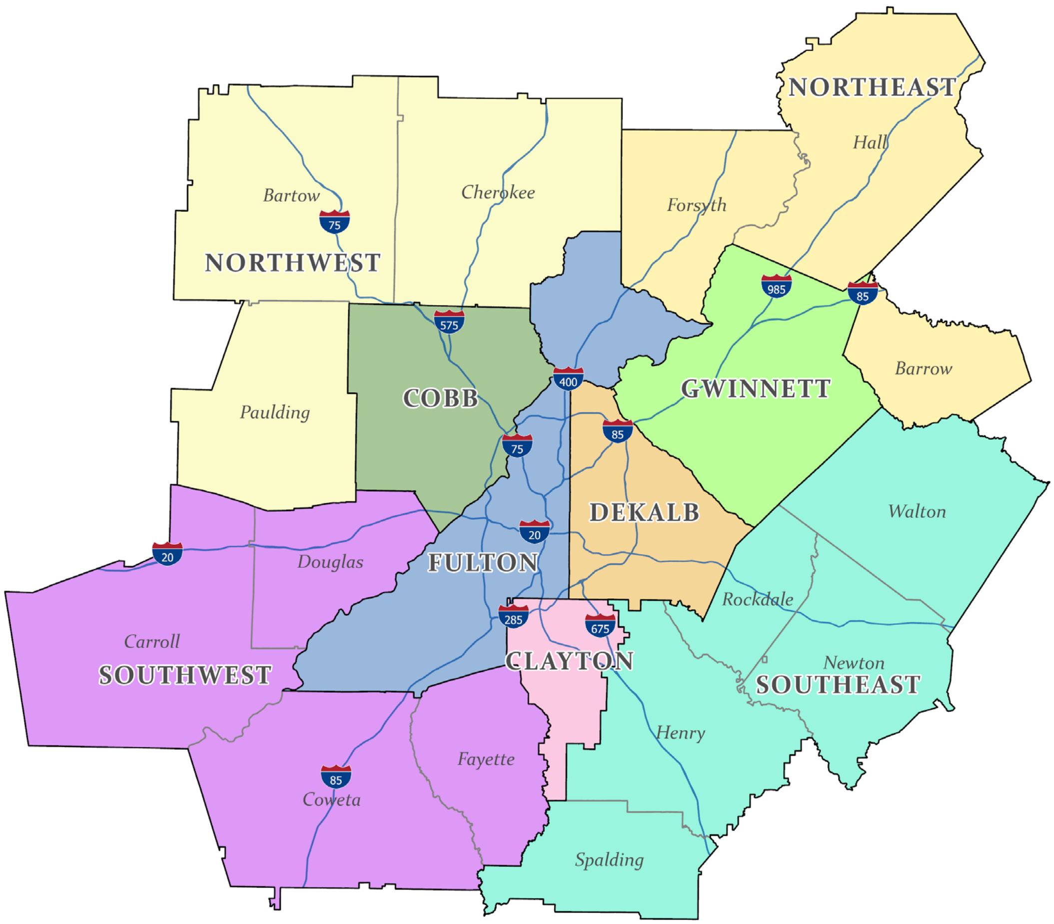
For weighting and expansion purposes, the 20 counties in the RCS study area were grouped into nine regions to support the development of statistically reliable weighting factors for areas with smaller populations, while preserving meaningful distinctions among the regions' core counties and outlying areas.

The nine groupings used in this expansion are as follows: Clayton County, Cobb County, DeKalb County, Fulton County, Gwinnett County, the Northeast grouping (Barrow, Forsyth, and Hall counties), the Northwest grouping (Cherokee, Pauling, and Bartow counties), the Southeast grouping (Henry, Walton, Newton, Rockdale, and Spalding counties), and the Southwest grouping (Coweta, Douglas, Fayette, and Carroll counties).

In addition, statistically significant samples were collected for workers who commute to each TMA. Because the ASAP territory is too small to achieve a statistically significant response, it was not included here but can be considered part of Midtown.

Results from the 2025 RCS illustrate ongoing adjustments in post-pandemic commuting and a settling into a new normal marked by continued reliance on single occupancy travel, increased hybrid and non-traditional work schedules, and, above all, the continuation of telework and work from home at an increased level compared to the pre-pandemic.

2025 Regional Commuter Survey County Regions



Overall changes in the workforce's commuting patterns have been driven by increased work from home, both workers who do so exclusively as well as those who telework on certain days, especially Monday and Friday.

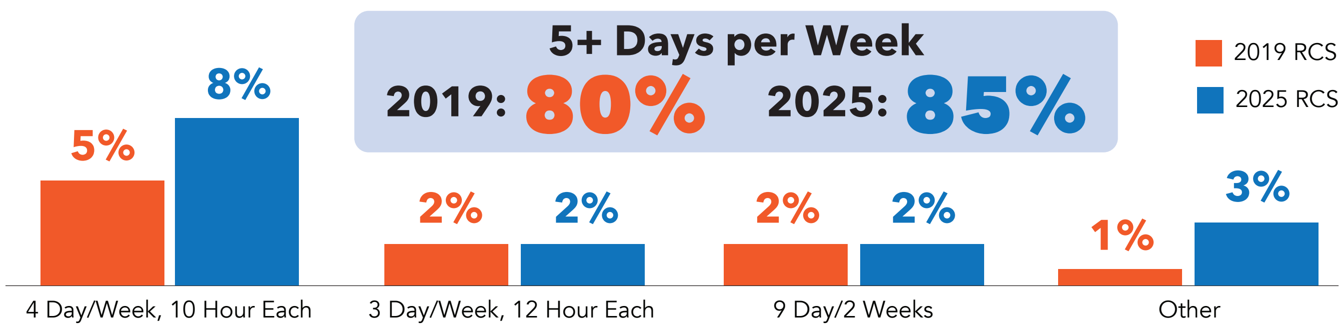
The decreased regularity of commuting has also coincided with decreased use of alternative commute modes, especially transit and carpool.

Telework levels decreased drastically from pandemic-era peaks when the majority of full-time workers were remote, and most employees continue to work primarily outside the home. However, a significant portion now incorporate remote work into their weekly schedules.

Work Schedules, Work From Home, & Telework Frequency

Compared to the 2019 RCS, **there is a higher prevalence of non-traditional or compressed work schedules in 2025**.

Most full-time employees still work traditional 5+ day per week schedules, but there has been a 50% increase in the share of workers following non-traditional or compressed schedules since 2019 (10% to 15%).



The biggest shift in non-traditional work schedules from 2019 was an increase in workers following a four 10-hour day per week schedule, up from 5% to 8% in 2025. There was also an increase in "Other", which varied from similar to the given choices to irregular schedules.

Although most workers are full-time, the **share of workers who are part-time has risen from 10.7% in 2019 to 13% in 2025**.

And part-time work is unequally distributed across occupation types.

Share of Workers Part-time by Occupation

Office	Government	Health	Education	Skilled/Manual	Retail/Services	Other
7%	6%	12%	15%	14%	21%	25%

In 2019, only 43% of workers reported teleworking or working from home. In 2025, this share has increased to 60%, a nearly 50% increase.

More striking, there has been a **dramatic increase in workers who are full-time work from home (WFH)** (or telework 5+ days a week), which has more than tripled since 2019, jumping from 6% to 20% in 2025. This illustrates that while working from home is not as prevalent as it was during the pandemic, it remains widespread among workers today.

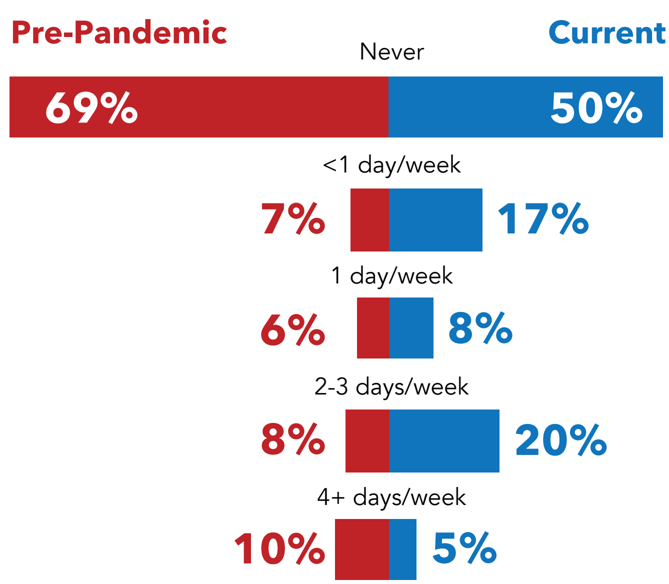
These full-time WFH workers do not commute are not included in any numbers or charts that refer to “commuters”.

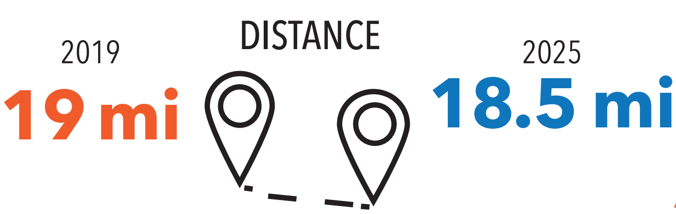
Workers who aren’t full-time WFH were asked about **current and pre-pandemic telework frequency**.

Only 31% of these commuters reported teleworking before the pandemic, but 50% do so today, reflecting the prevalence of remote work despite recent return-to-office trends.

While more commuters telework occasionally in 2025, fewer are teleworking 4+ days per week than they did in 2019, suggesting that hybrid work arrangements may have replaced full-time work from home for some workers.

The increase in telework and full-time Work From Home may help explain that although the average commute distance is very similar to 2019, **the average commute time has gone down from 39.3 to 34.6 minutes**.

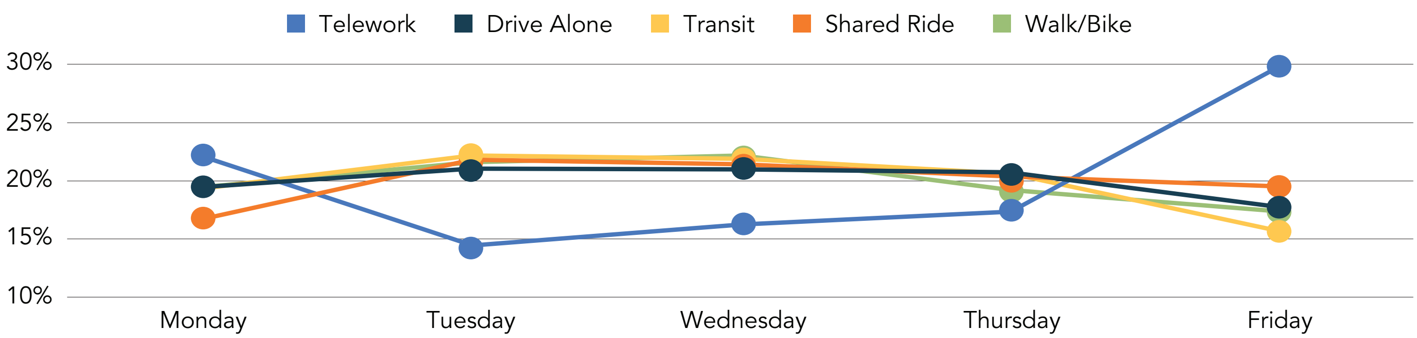




Teleworking by day of week and demographics

The use of teleworking by commuters exhibits a distinct pattern across the work week, with the majority of weekly telework trips taking place on Monday (22%) and especially Friday (30%).

Share of Each Mode's Weekly Trips by Day



There are more telework "trips" than alternative mode trips during the week and they are mostly replacing drive alone trips. This means Mondays and Fridays should see less congestions due to fewer cars on the road.

All other commute modes demonstrate a similar pattern to one another in direct opposition to that of telework, with the largest share of their total weekly trips occurring mid-week, between Tuesday and Thursday.

Although it remains prevalent on a regional scale, teleworking is not equally accessible and available to all workers. There are significant differences across sociodemographic categories like occupation and household income.

Full-time Work From Home by Occupation

Education	Skilled/Manual	Health	Retail/Services	Government	Office
6%	8%	12%	18%	8%	25%

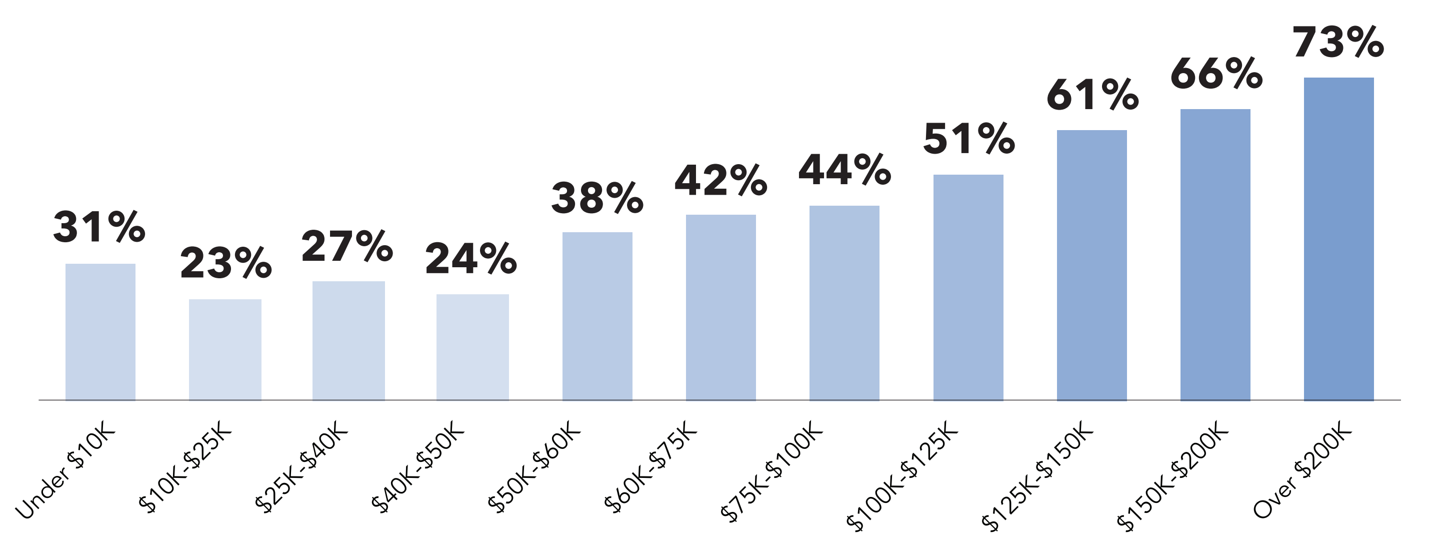
Looking at occupation, **a full 25% of office workers are full-time work from home (WFH)**, much higher than other sectors, especially education, government, and skilled/manual labor.

For workers who do commute, 74% of office workers telework, at least occasionally, a much larger share than other sectors, especially skilled/manual and education, where the share of commuters who telework is below 30%.

Teleworkers by Occupation

Similarly, the ability to telework is not equally available across average annual household income brackets. While nearly 75% of commuters making over $200K a year telework, at least occasionally, the share of teleworkers is much lower for commuters with a household income under $60K a year, where only 23% to 31% of commuters telework, even occasionally.

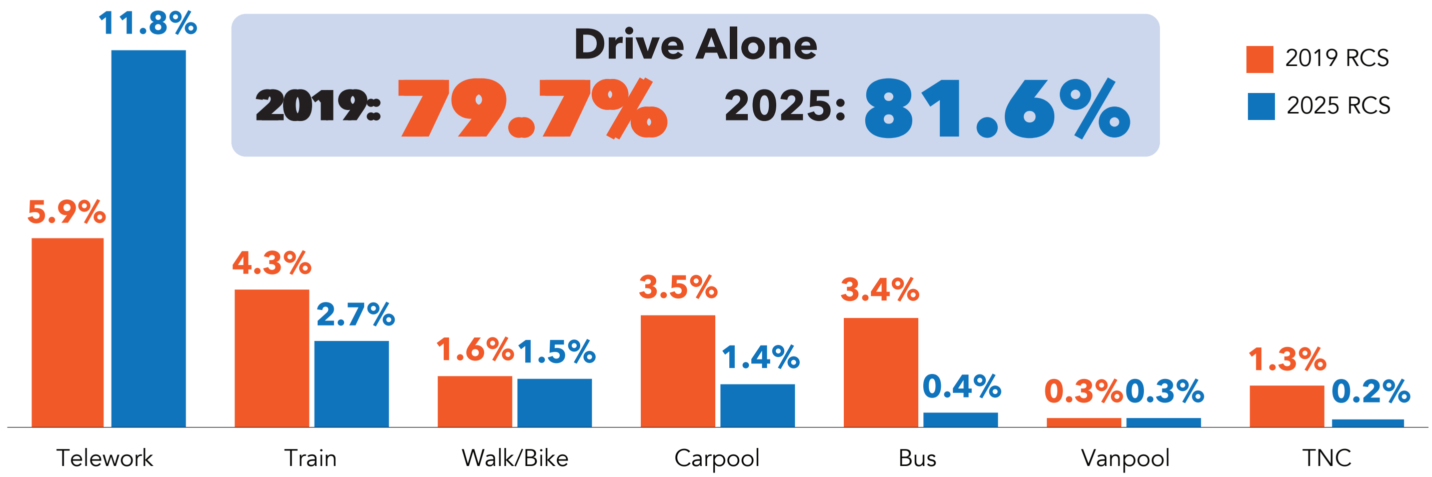
Teleworkers by Income



Primary Mode and Mode Use

On a regional scale, commuting behavior in 2025 is marked by an **increase in the use of telework, as well as drive alone, and a concomitant reduction in the use of alternative modes**.

Primary Commute Mode*

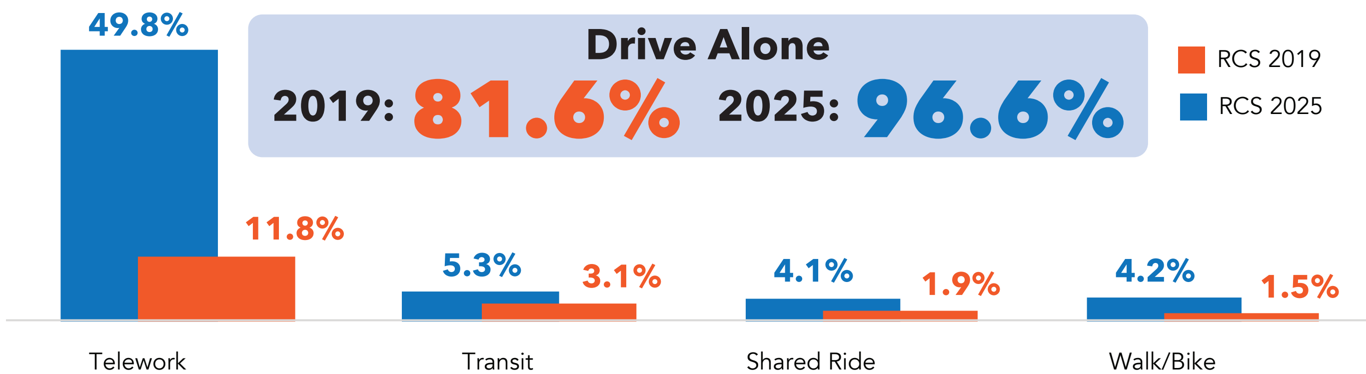


** "Primary Mode" reflects the behavior of commuters (people who work outside their home, at least occasionally) and does not include workers who are full-time Work From Home (WFH).*

The "primary mode" is the commute mode used most frequently by a commuter (including telework). If multiple modes were chosen for the same number of days, a hierarchy was applied—from highest to lowest: vanpool, carpool, train, express bus, local bus, bicycle, walk, telework, drive alone, and then taxi/Uber/Lyft. For some charts, primary modes are grouped into: Drive Alone, Telework, Transit (train, local bus, express bus), Shared Ride (carpool, vanpool, and TNC), and Walk/Bike (walk and bike).

The share of commuters using alternative transportation for their primary mode **declined across all alternative travel modes**, especially carpool and bus. Telework saw a large increase and there was also a slight increase in drive alone.

Mode Use and Primary



When looking at commuter mode use without limiting each commuter to a single primary mode, it is clear that **alternative modes are being utilized, even if they are not a given commuter's primary mode**. This is most likely due, in part, to the increased prevalence and frequency of telework washing out other non drive alone modes in the primary mode analysis.

There is a **relatively high degree of multi-modal behavior** among commuters, particularly for those who use alternative travel modes as their primary mode.

Mode Used \ Primary Mode	Drive Alone	Telework	Transit	Shared Ride	Walk/Bike
Drive Alone	100.0%	94.0%	54.7%	68.8%	54.0%
Telework	42.1%	100.0%	57.8%	38.8%	73.0%
Transit	1.0%	5.7%	100.0%	22.1%	21.2%
Shared Ride	1.5%	3.5%	20.5%	100.0%	9.4%
Walk/Bike	0.8%	4.2%	42.5%	14.2%	100.0%

For example, for commuters who use transit as their primary mode, 21% also commute by shared ride and 43% walk/bike. Similarly, 22% of commuters who use shared ride as the primary mode also use transit.

However, the majority of commuters who primarily drive alone do not use other travel modes.

Commute Mode Frequency and Travel Attributes

63% of full-time workers who commute report driving alone every workday, reflecting a high level of consistency in this mode choice. Among those who do not drive alone everyday, most do so either four days a week (11.5% of commuters) or 3 days a week (2.5% of commuters).

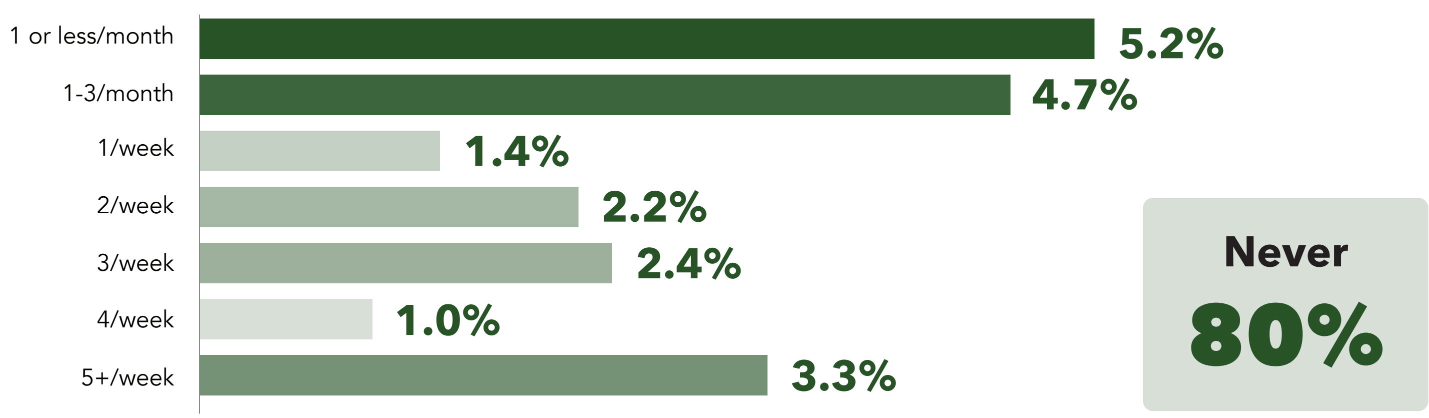
Drive Alone Frequency (Full-time Workers who Commute)

5+ Days/Week 63%

Never	1 or less/month	1-3/month	1/week	2/week	3/week	4/week
2.8%	0.7%	1.2%	3.0%	5.4%	12.5%	11.5%

As expected, driving alone is a very common commute travel mode, and **only 2.8% of regional commuters report never driving alone** to travel to a work location.

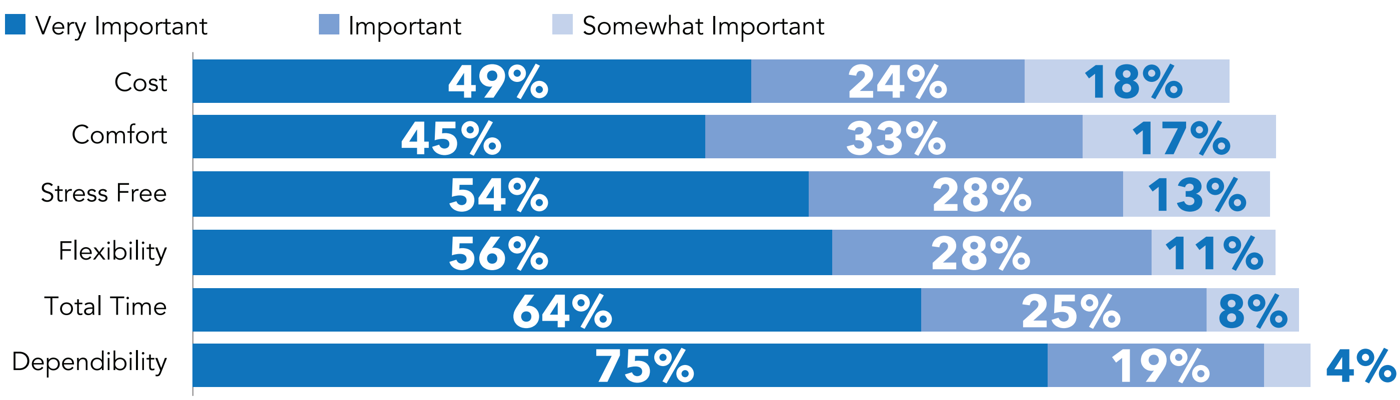
Atlernate Mode Frequency (Full-time Workers who Commute)



Most commuters either only drive alone or drive alone and telework on certain days. **80% of full-time workers who commute report never using an alternative mode** to travel to a work location, and **only 10% of commuters use alternative modes on a weekly basis**.

However commuters who use an alternative travel mode as their primary commute mode, **41% of them do so every workday, never driving alone**. This suggests that the use of alternative modes can become a well-established behavior that replaces it altogether.

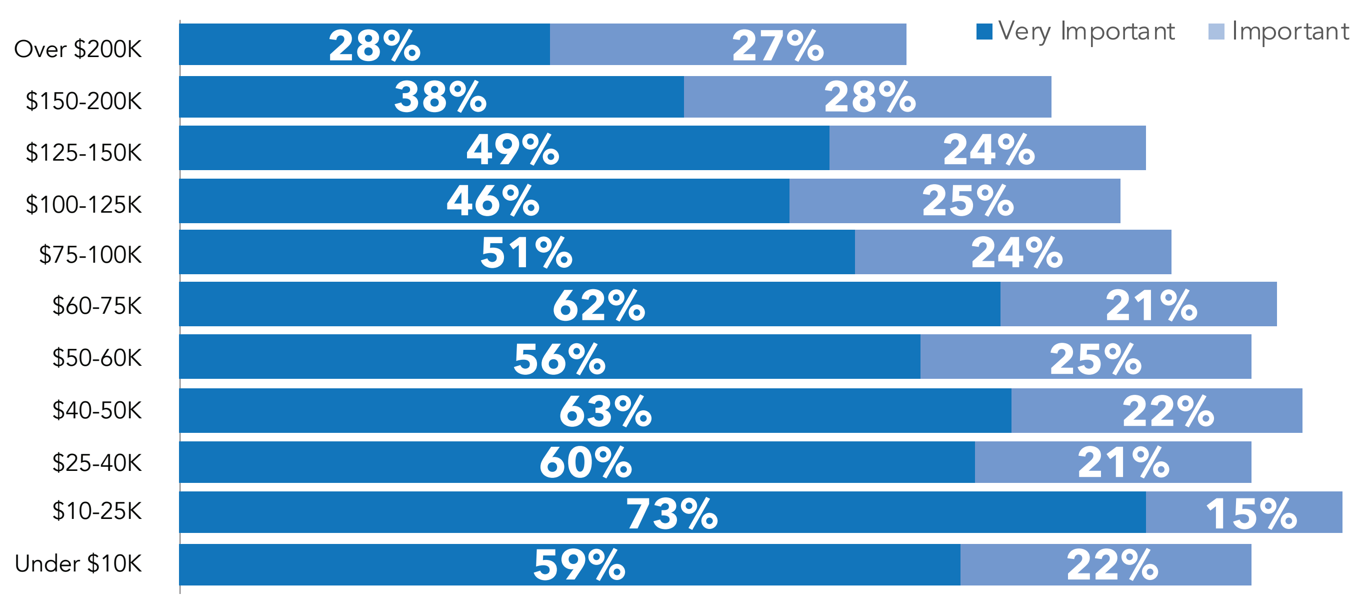
Importance of Travel Attributes in Mode Choice



Many factors contribute to a commuter's choice of travel mode(s). RCS respondents ranked a set of travel attributes from not at all important to very important. While most deemed all to be at least somewhat important, some attributes were seen to be more important that others.

The most important attribute was dependability, with nearly 95% saying it was important or very important in their mode choice (19% and 75%, respectively). This was followed closely by the total time it takes to travel, with 89% of respondents deeming it important or very important.

Importance of Travel Attributes in Mode Choice



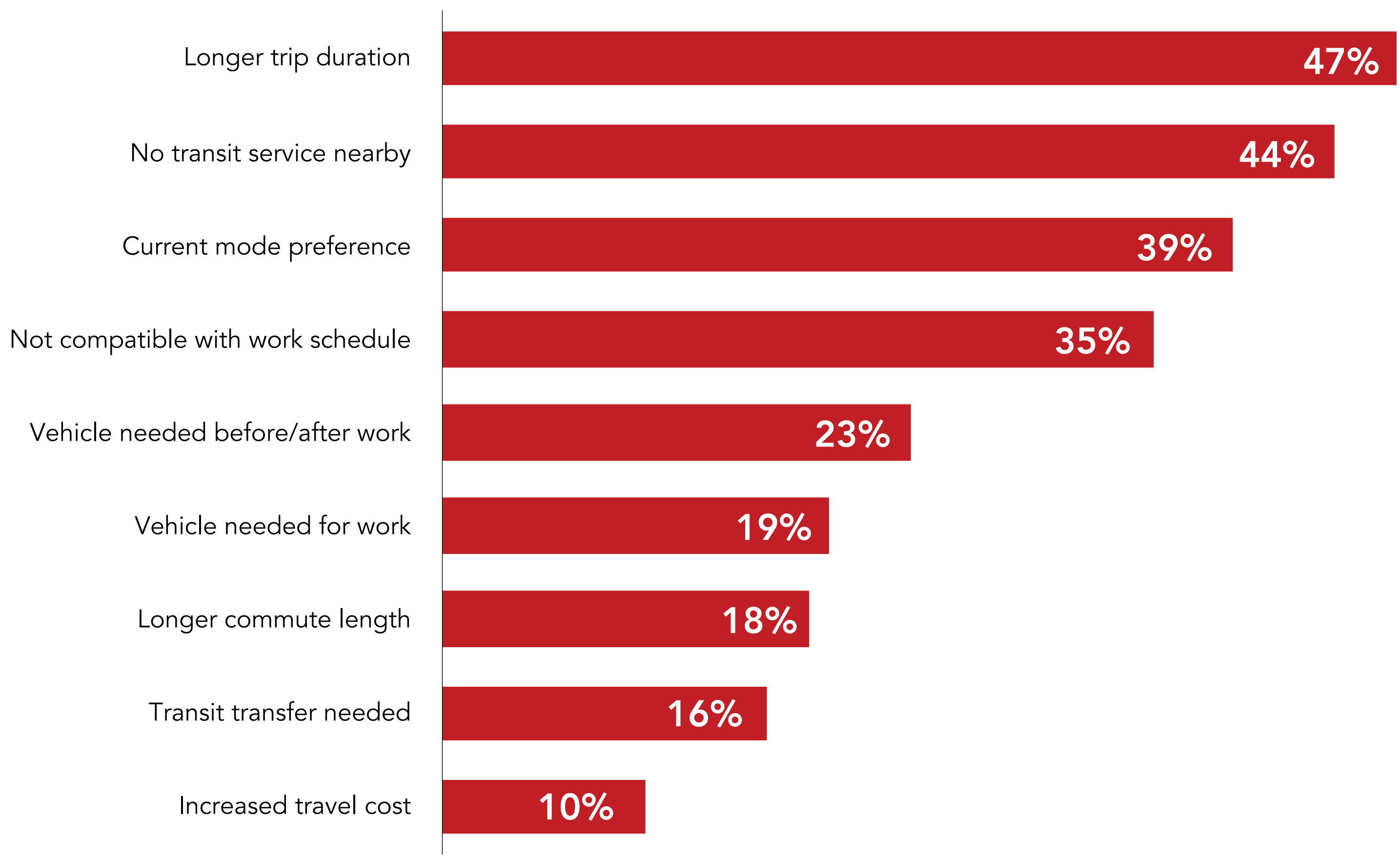
Somewhat surprisingly, only 73% of regional workers said that the cost of travel was important or very important to them in choosing a mode.

However, when breaking it down by annual household income, it becomes clear that the **cost of travel is an important factor in mode choice for workers with a household income of $75K or below**. It is only above this threshold that cost is deemed less important in mode choice.

Benefits, Barriers, and Opinions

Respondents identified a range of challenges that make it difficult to use alternative commute modes. The **most frequently cited barrier was longer trip time (47%)**, followed closely by no transit available for the trip (44%).

Barriers to Using Atlernative Commute Modes



Other common barriers included preferring the current mode (39%), incompatible work hours (35%), and the need for a personal vehicle either before/after work (23%) or during the workday (19%).

Collectively, these results highlight the influence of travel time, service availability, and schedule flexibility on how commuters view the viability of any given commute mode.

Differences in perceived barriers to alternative modes show variation by home county/region. **In the core counties, especially Fulton and DeKalb, longer trip duration is a larger barrier than it is in the outer counties.** This may be because commuters in those counties have relatively short commutes, so adding time would mean a larger percent increase to their trips.

Barriers to Using Atlernative by Home Region

	Clayton	Cobb	DeKalb	Fulton	Gwinnett	Northeast	Northwest	Southeast	Southwest
Longer trip duration	52%	50%	58%	62%	50%	34%	34%	35%	39%
No transit service nearby	42%	56%	37%	41%	48%	45%	48%	40%	38%
Current mode preference	42%	34%	29%	38%	35%	42%	41%	48%	48%
Not compatible with schedule	29%	35%	30%	29%	38%	39%	40%	37%	40%
Vehicle needed before/after	16%	19%	25%	20%	22%	27%	23%	25%	24%
Vehicle needed for work	19%	14%	16%	17%	18%	21%	23%	25%	24%
Longer commute length	18%	15%	17%	19%	16%	16%	19%	22%	18%
Transit transfer needed	16%	23%	27%	17%	6%	6%	7%	6%	6%
Increased travel cost	19%	8%	8%	11%	11%	11%	10%	15%	12%

No transit service nearby remains a top barrier across counties, especially in Cobb. Even in the core counties that have transit service, commuters do not feel they have sufficient access to it.

In the outer counties, simply preferring to drive alone is a key barrier, but those respondents also reported needed a personal vehicle before, during, and after work at a higher rate than the core counties.

79% of respondents that commute to a work location reported having either free or fully subsidized parking available at work, and an additional 2% of commuters only pay some of their parking costs, with their employer covering the rest.

While free parking may not be a conscious barrier to commuters using alternative modes, it does incentivize them to drive alone to work as there are less direct costs associated with it.

Share of Commuters that Pay for Parking

Do Not Pay	Pay Some	Pay All	Rarely Park
79%	2%	6%	12%

Although just under 14% of regional commuters use alternative commute modes, and only 10% use them on a weekly basis, **having access to services and benefits that make it easier to use alternative modes is seen as important or very important by nearly 75% of regional workers.**

Importance of Access to Alternative Mode Services and Benefits

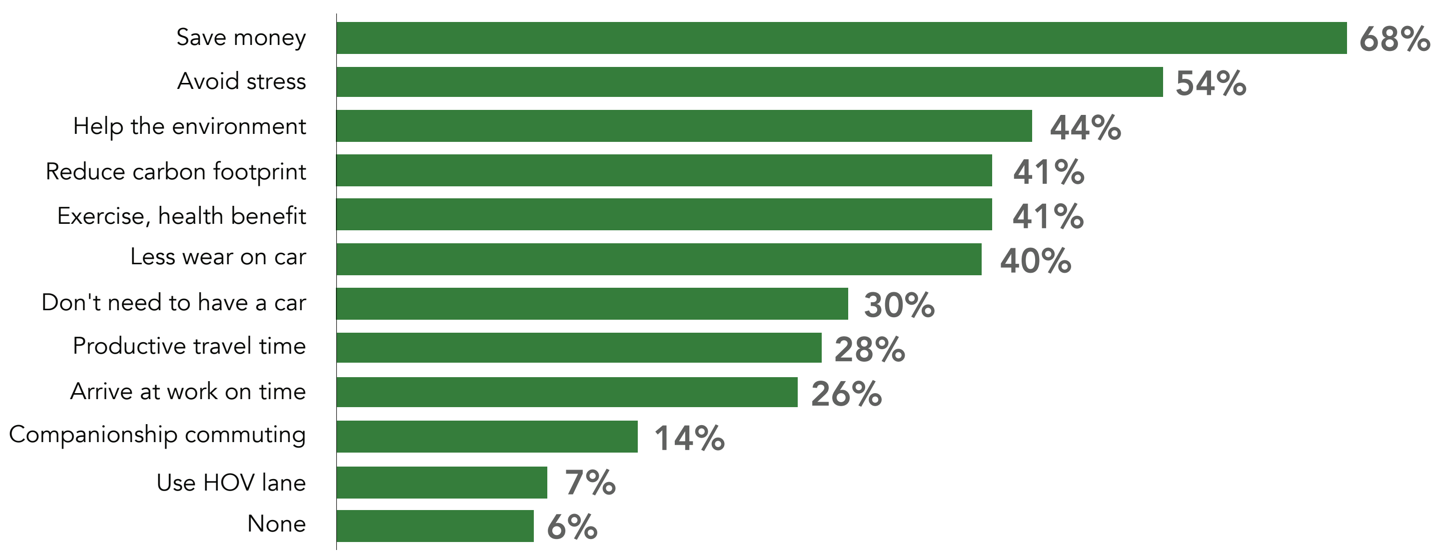
Very Important	Important	Somewhat Important
48%	24%	17%

Workers recognize the importance of making alternative commute modes available to regional commuters, even if they themselves do not currently use them. It also suggests an openness to trying alternative modes in the future.

For the 10% of regional commuters who use alternative travel modes on a weekly basis to get to work, there are numerous advantages associated with using non-drive alone modes.

The top two perceived benefits to using alternative commute modes were saving money (68%) and avoiding stress (54%).

Benefits to Using Alternative Commute Modes



Saving money was also the top benefit recognized by commuters in 2019. However, avoiding stress was tied for the least common perceived benefit in 2019, highlighting that **commuters are more focused on stress reduction in 2025**.

Benefits to Using Alternative Commute Modes by Primary Mode

	Drive Alone	Telework	Transit	Shared Ride	Walk/Bike
Save money	55%	71%	78%	65%	77%
Avoid Stress	48%	64%	63%	41%	62%
Help the environment	27%	38%	56%	34%	73%
Reduce carbon footprint	31%	39%	51%	30%	66%
Exercise/health	30%	46%	48%	9%	89%
Less wear on car	30%	43%	52%	29%	45%
Don't need a car	16%	28%	39%	27%	47%
Productive travel time	20%	38%	46%	19%	15%
Arrive at work on time	19%	27%	30%	19%	38%
Companionship	14%	11%	3%	41%	4%
Use HOV Lane	6%	4%	4%	21%	

The perceived benefits of using alternative modes vary across sociodemographic categories but are especially varied when looked at by primary commute mode.

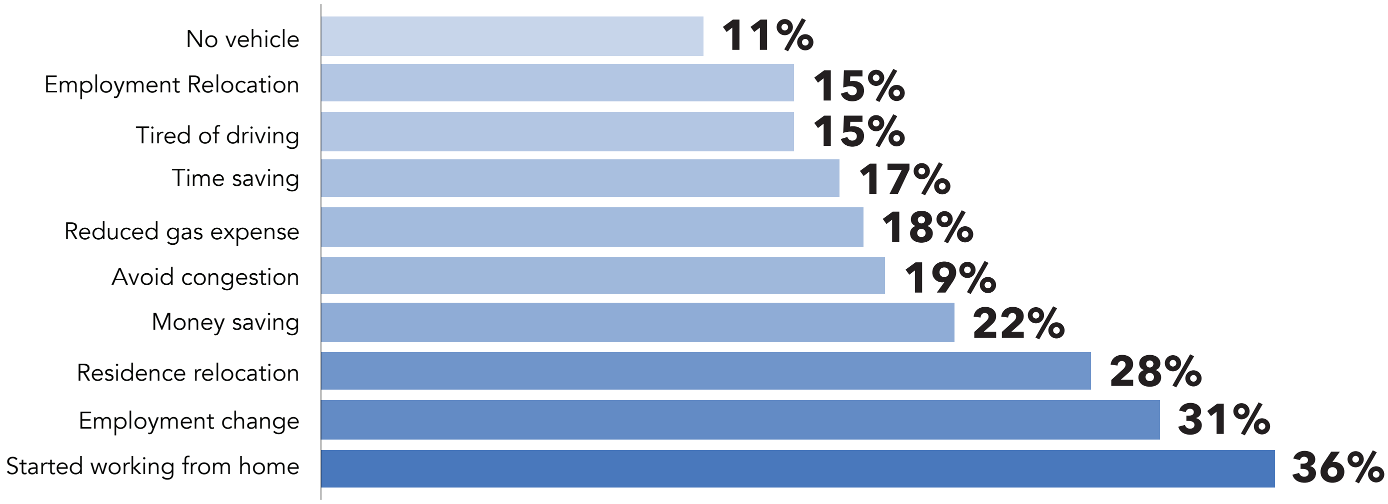
For commuters who primarily use walk/bike, getting exercise and health benefits is key (89%), as is helping the environment (73%).

Transit user are mostly focused on the money saving aspect of their chosen mode (78%) but also appreciate that transit lets them use their travel time productively (46%).

And for those primarily suing shared ride (carpool or vanpool), companionship while commuting is a big plus (41%).

Sevneteen percent of regional workers reported having changed their primary mode within that last five years. While many of these workers now are full-time WFH (32%), the largest share currently drive alone (43%).

Reasons for Changing Commute Mode



For commuters who switched to driving alone as their primary mode, employment change (32%) and residential relocation (27%) were the main reasons for the change.

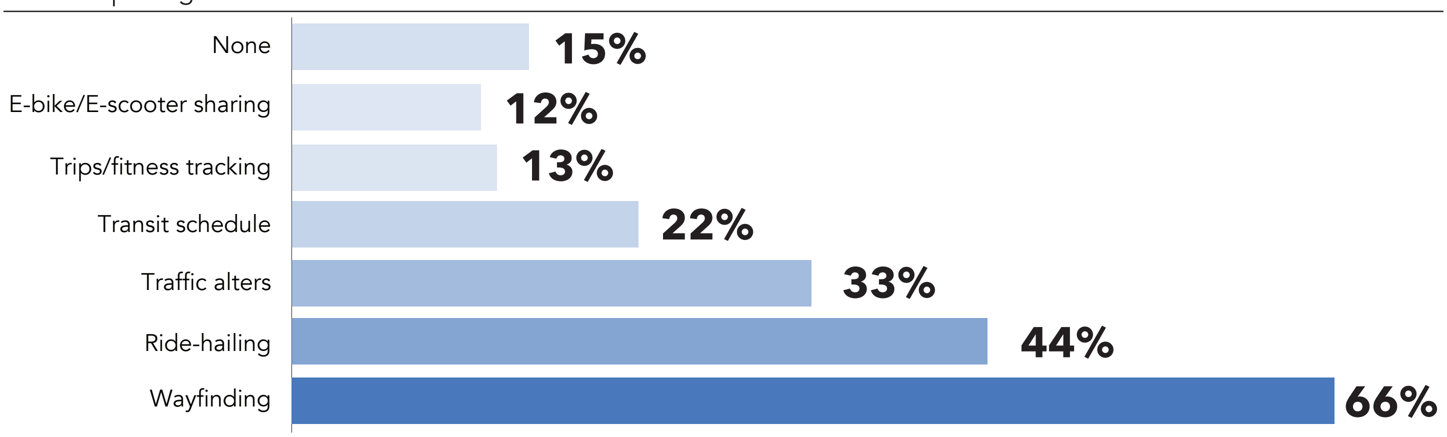
These were also top reasons for commuters who switched to an alternative mode, but for transit and walk/bike commuters, being tired of driving was also high on the list.

While commuters may have many reasons to consider switching their commute mode, **it is the big change points in life, like a new job or moving to a new house, that presents the best opportunity to make the switch**.

Regional workers also utilize travel/trip applications when making **mode choices and navigating their commute. Only 15% of respondents reported not using travel/trip apps at all**, but this can vary by age, with 31% of respondents age 65+ not using any travel apps.

The most popular type of apps were wayfinding (66%) and ride-hailing (44%), followed by traffic alerts (33%). Widespread app use highlights the many possible avenues through which to communicate to commuters regarding the travel options available to them.

Travel/Trip Usage



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