



2018-2019 Maryland Travel Survey (MTS) Results - Long Distance Commuting & The Geography of Consumer Spending

Technical Committee

May 4, 2021



Presentation Outline



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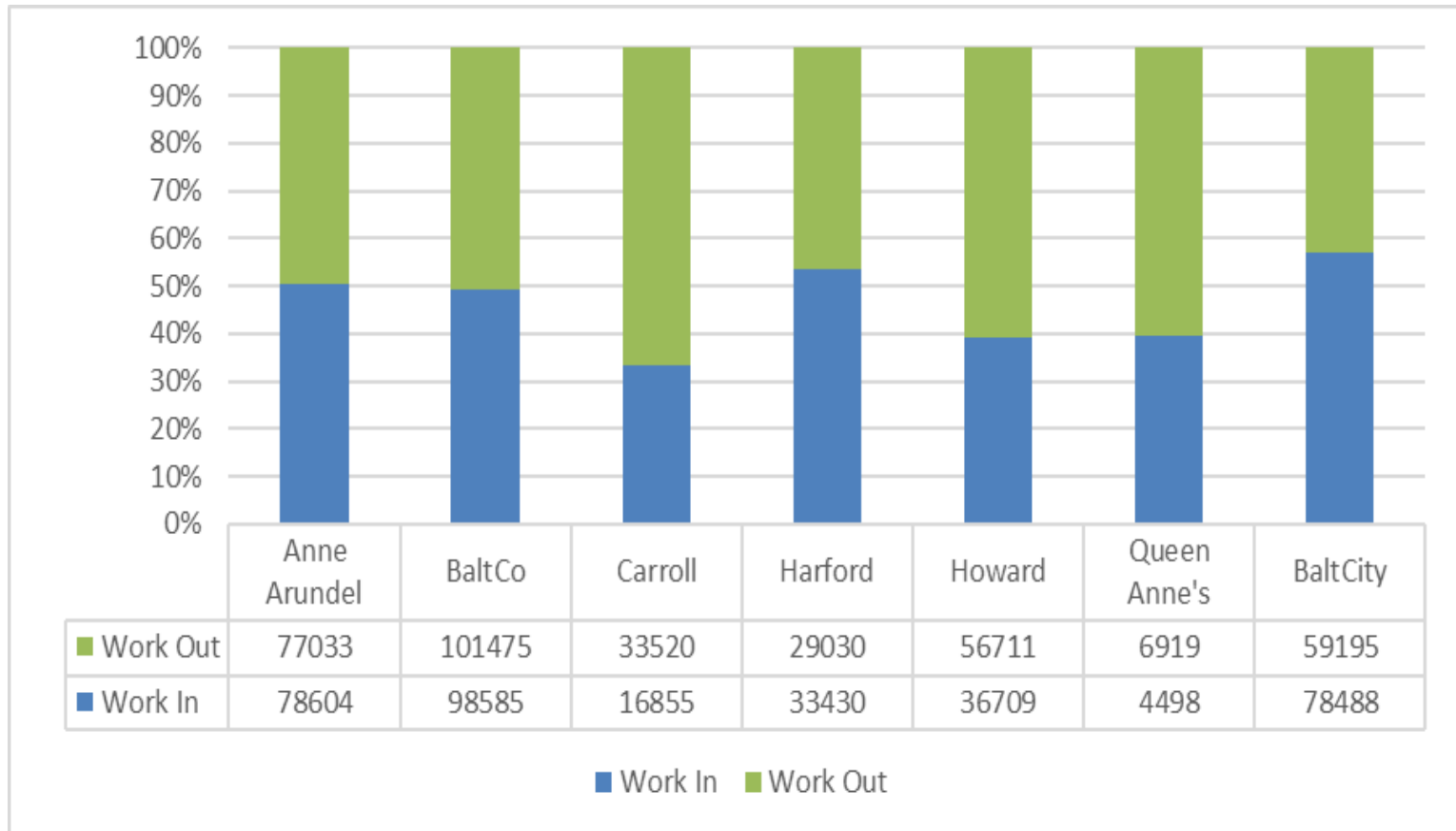
Research Question

- Source: Queen Anne's County
- Large numbers of QA's County commuters travel long distances to other jurisdictions. Do they also buy goods and services in other jurisdictions, depriving QA's County businesses of their consumer dollars?
- Is the perception of QA's County accurate and, if so, to what extent is it also true of commuters from other Baltimore region jurisdictions?

Demographic Review

- Work Inside Home Juris (Work In)
VS
- Work Outside Home Juris (Work Out)

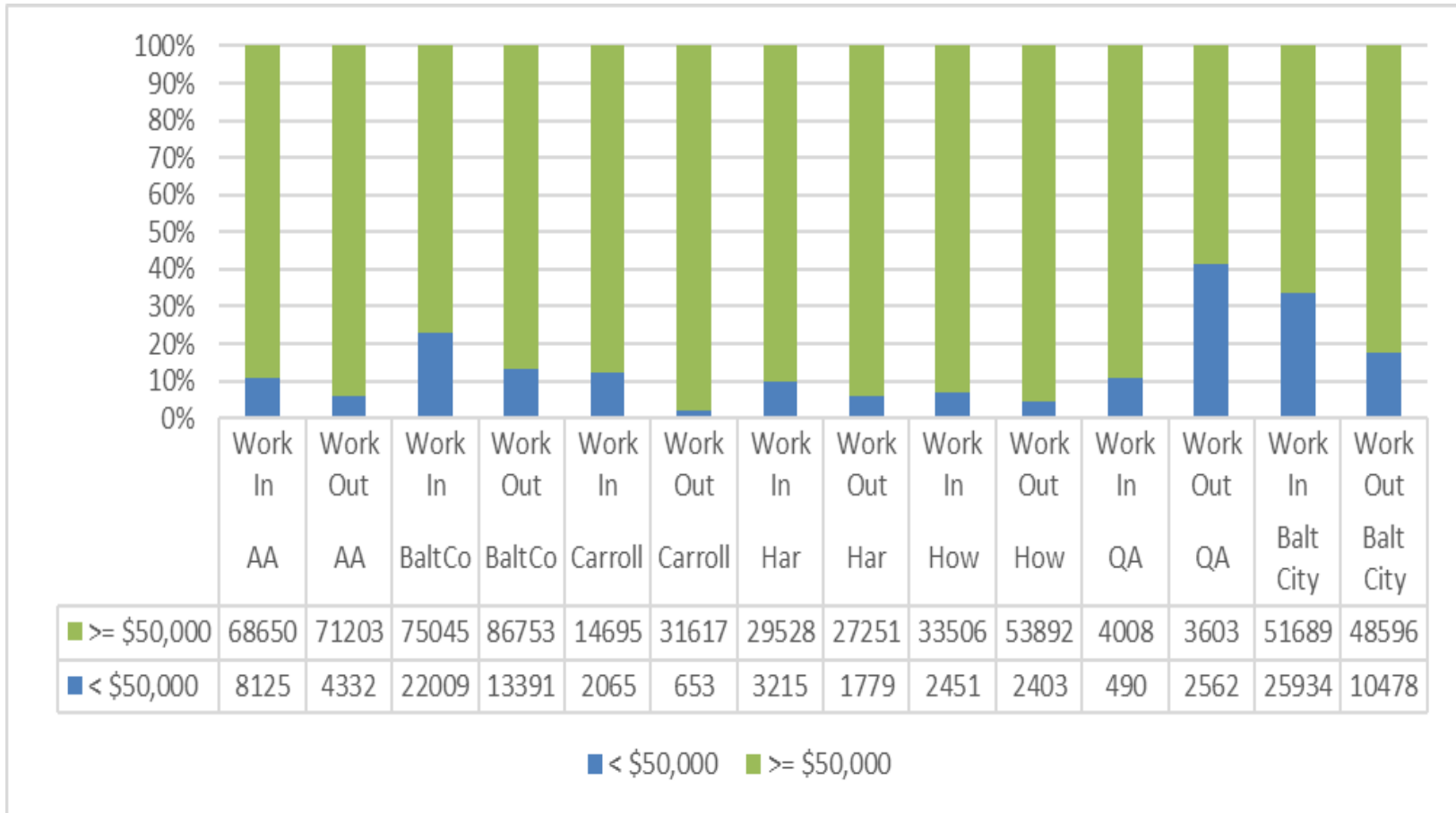
Work In/Work Out by Jurisdiction



Summary of Demographic Review (Work In/Work Out by Juris)

- Queen Anne's County has a smaller population and fewer commuters, both Work Ins and Work Outs, than other Baltimore region Jurisdictions.
- Work Ins and Work Outs are evenly divided in Anne Arundel and Baltimore Counties.
- Work Ins outnumber Work Outs in Harford County and Baltimore City.
- Work Outs outnumber Work Ins in Carroll, Howard, and Queen Anne's counties.
- Carroll County has the largest share of Work Outs at just under 67 percent.

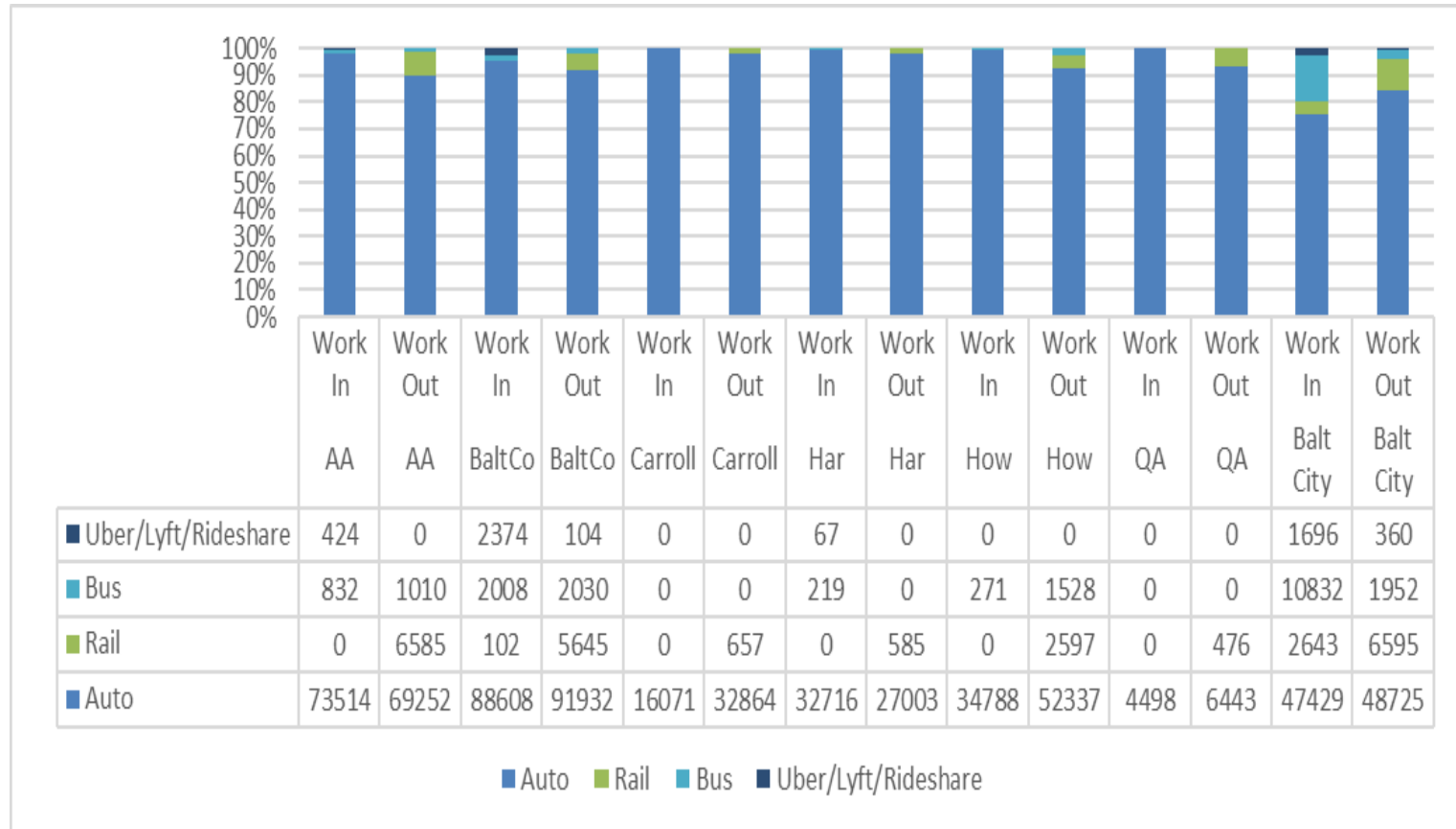
HH Income by Work In/Work Out by Juris



Summary of Demographic Review (HH Income)

- In general, a larger proportion of Work Outs have HH Incomes equal to or greater than \$50,000 compared to Work Ins from the same jurisdiction, although the differences are small in most cases.
- Work Ins are more likely to have HH Incomes below \$50,000.
- The one notable exception is Queen Anne's County. There a larger proportion of Work Ins have incomes equal to or greater than \$50,000 compared to Work Outs.

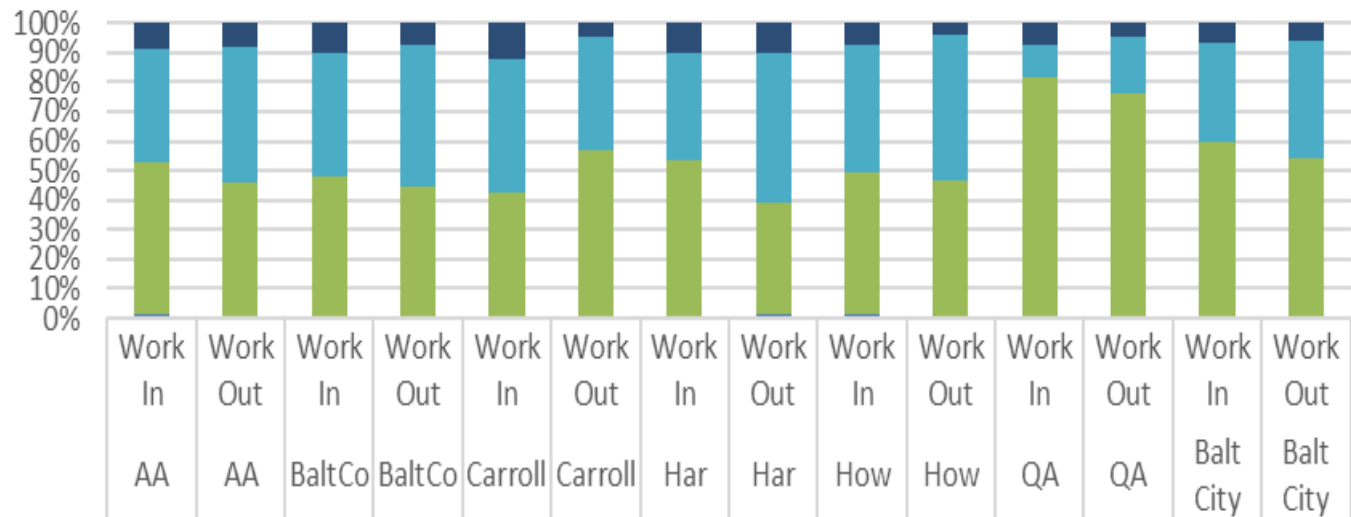
Commute Mode by Work In/Work Out by Juris



Summary of Demographic Review (Commute Mode)

- Most commuters from all jurisdictions, both Work Ins and Work Outs, travel to work in an automobile, whether as the driver or as a passenger.
- A larger share of Work Ins commute by Uber, Lyft, or other Rideshare Companies.
- A larger share of Work Outs commute by Bus or Rail, although Baltimore City, where a larger share of Work Ins commute by Bus, is an exception.

Age by Work In/Work Out by Juris



■ 16-17 years old ■ 18-44 years old ■ 45-64 years old ■ 65 years old or older

Summary of Demographic Review (Age, Part 1)

- Comparatively few 16 to 17 years olds commute to work but among those who do, Work Ins outnumber Work Outs, with two exceptions:
 - 1) In Harford County, Work Outs outnumber Work Ins, three to one.
 - 2) In Queen Anne's County, no 16 to 17 year olds reported commuting to work in the MTS Survey, suggesting that, in the larger population, fewer 16 to 17 year olds commute compared to other jurisdictions.
- The largest cohort of commuters is 18 to 44 year olds. Among this group, Work Ins outnumber Work Outs in Anne Arundel, Baltimore, and Harford Counties, and in Baltimore City; Work Outs outnumber Work Ins in Carroll, Howard, and Queen Anne's Counties.

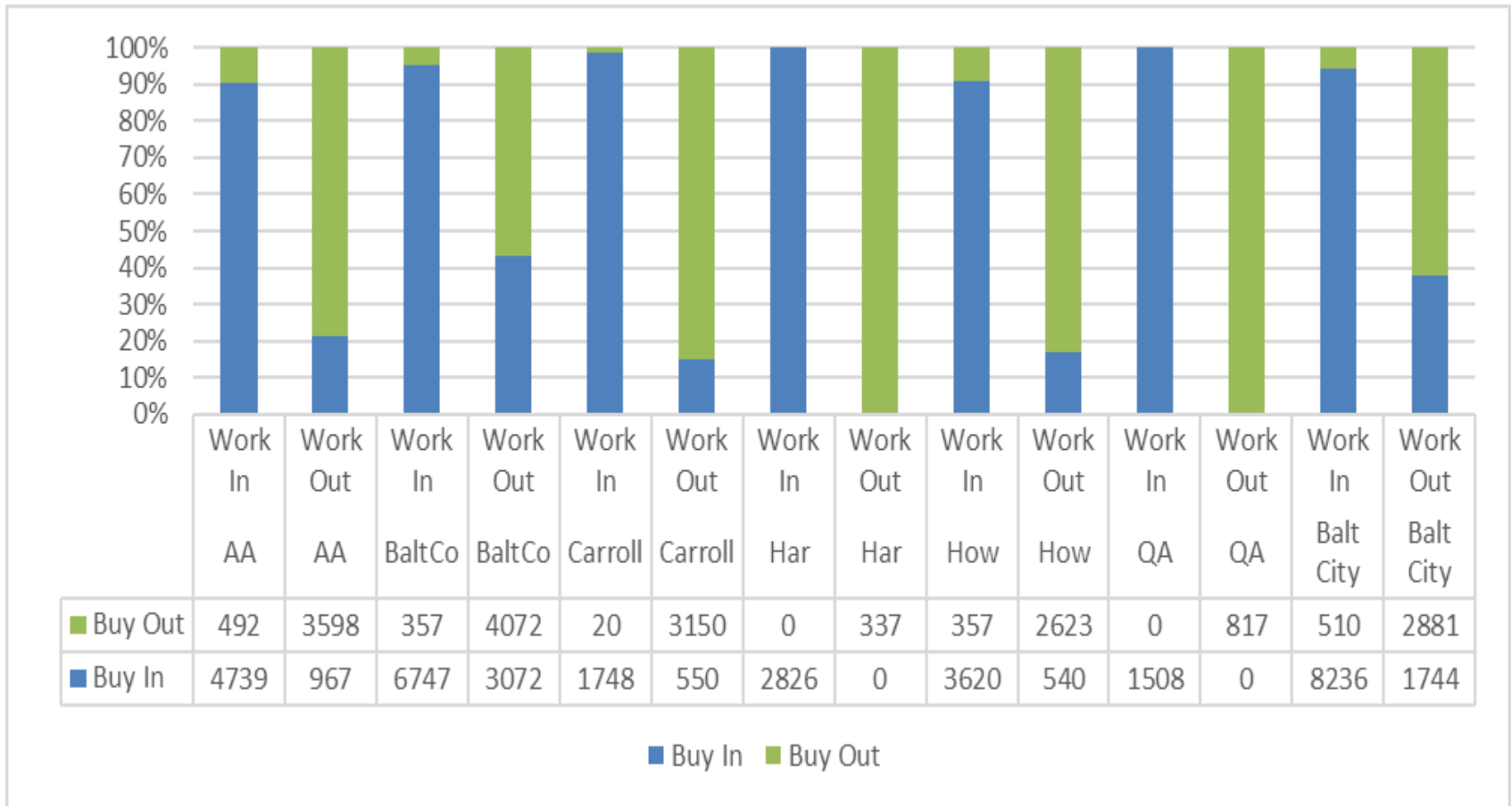
Summary of Demographic Review (Age, Part 2)

- The second largest cohort of commuters is 45 to 64 year olds. Among this group:
 - Work Outs outnumber Work Ins in Anne Arundel, Baltimore, Carroll, Harford, Howard, and Queen Anne's counties; and
 - Work Ins outnumber Work Outs in Baltimore City
- The pattern reverses in the last and much smaller cohort of commuters, those 65 years and older. Among this group, Work Ins significantly outnumber Work Outs. The only exception is Queen Anne's County, where the numbers are equal.

Analysis of Consumer Spending

- Buy Inside Home Juris (Buy In)
VS
- Buy Outside Home Juris (Buy Out)

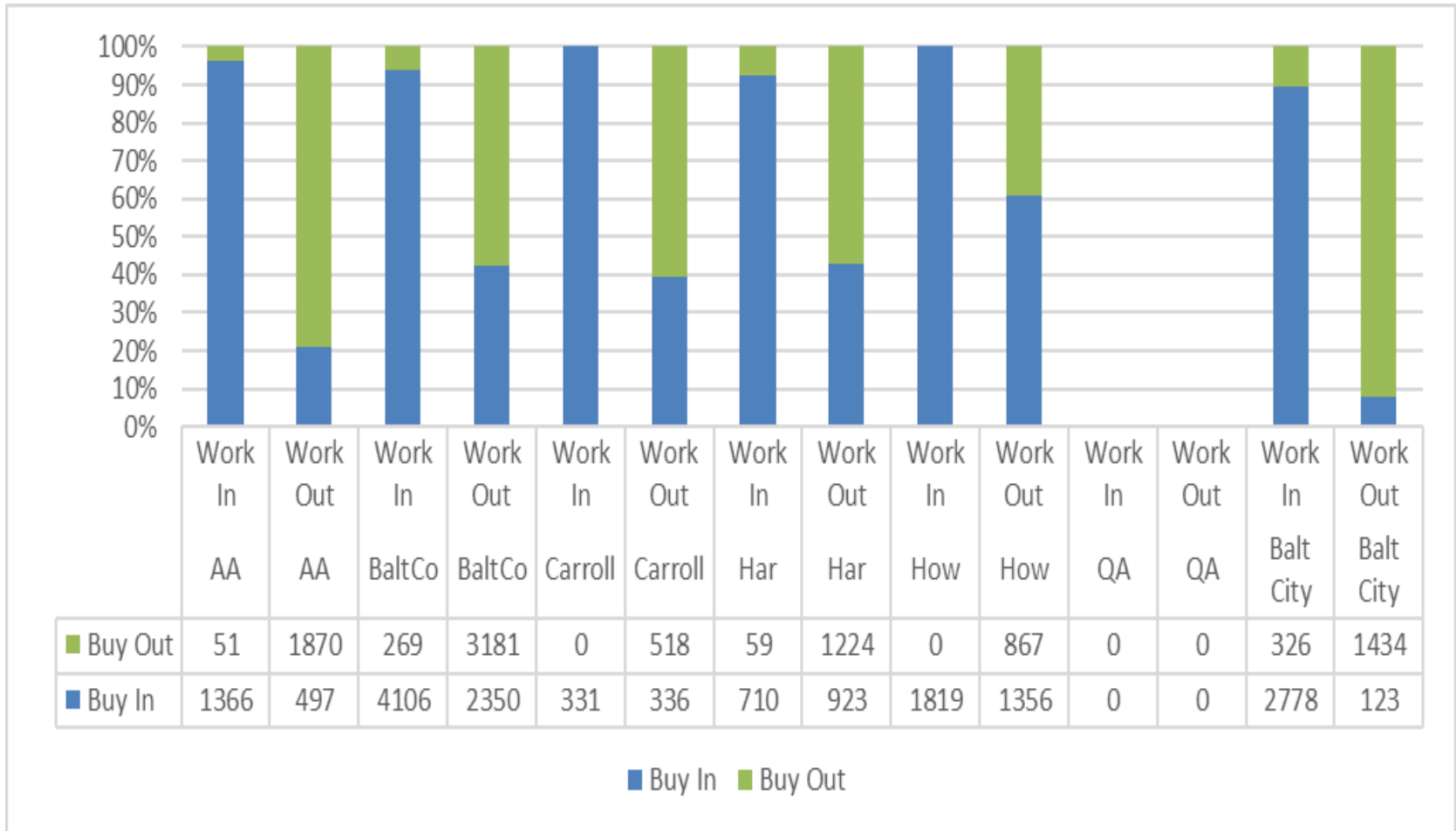
Buy Meal(Sit-Down) by Work In/Work Out by Juris



Summary of Analysis of Consumer Spending (Buy Meal, Sit-Down)

- In all Jurisdictions, a majority of Work Ins are also Buy Ins and, conversely, a majority of Work Outs are also Buy Outs.
- The most extreme cases are Harford County and Queen Anne's County, where all Work Ins Buy In and all Work Outs Buy Out.

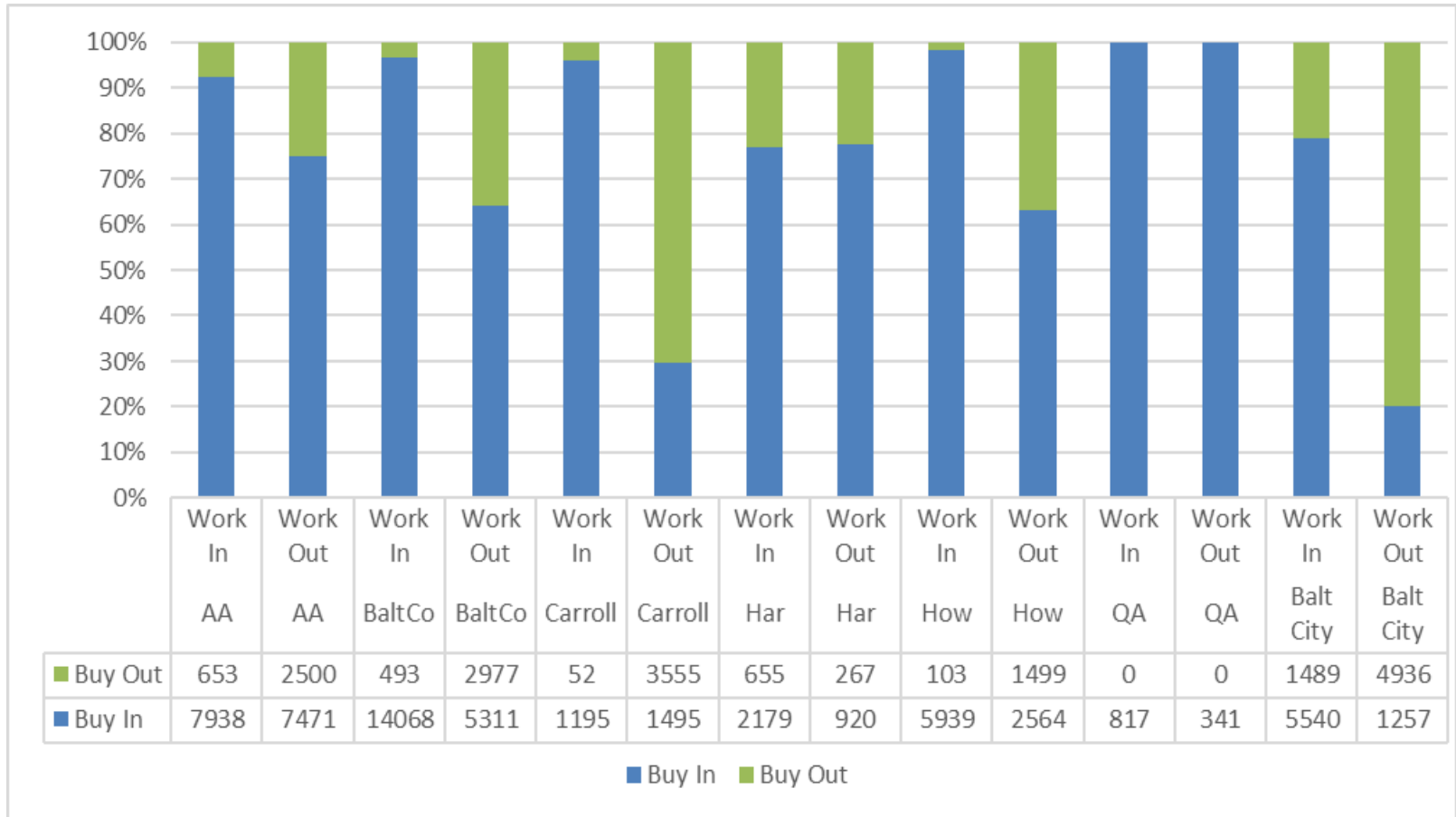
Buy Meal(QuickStop) by Work In/Work Out by Juris



Summary of Analysis of Consumer Spending (Buy Meal, QuickStop)

- In all Jurisdictions, a majority of Work Ins are also Buy Ins and, conversely, a majority of Work Outs are also Buy Outs.
- The only exception is Queen Anne's County, where no commuters, including Work Ins and Work Outs, stopped at a Fast Food Restaurant.
- The results suggest that Queen Anne's County Commuters, who patronized Sit-Down Restaurants in large numbers, have a much lower demand for Fast Food.

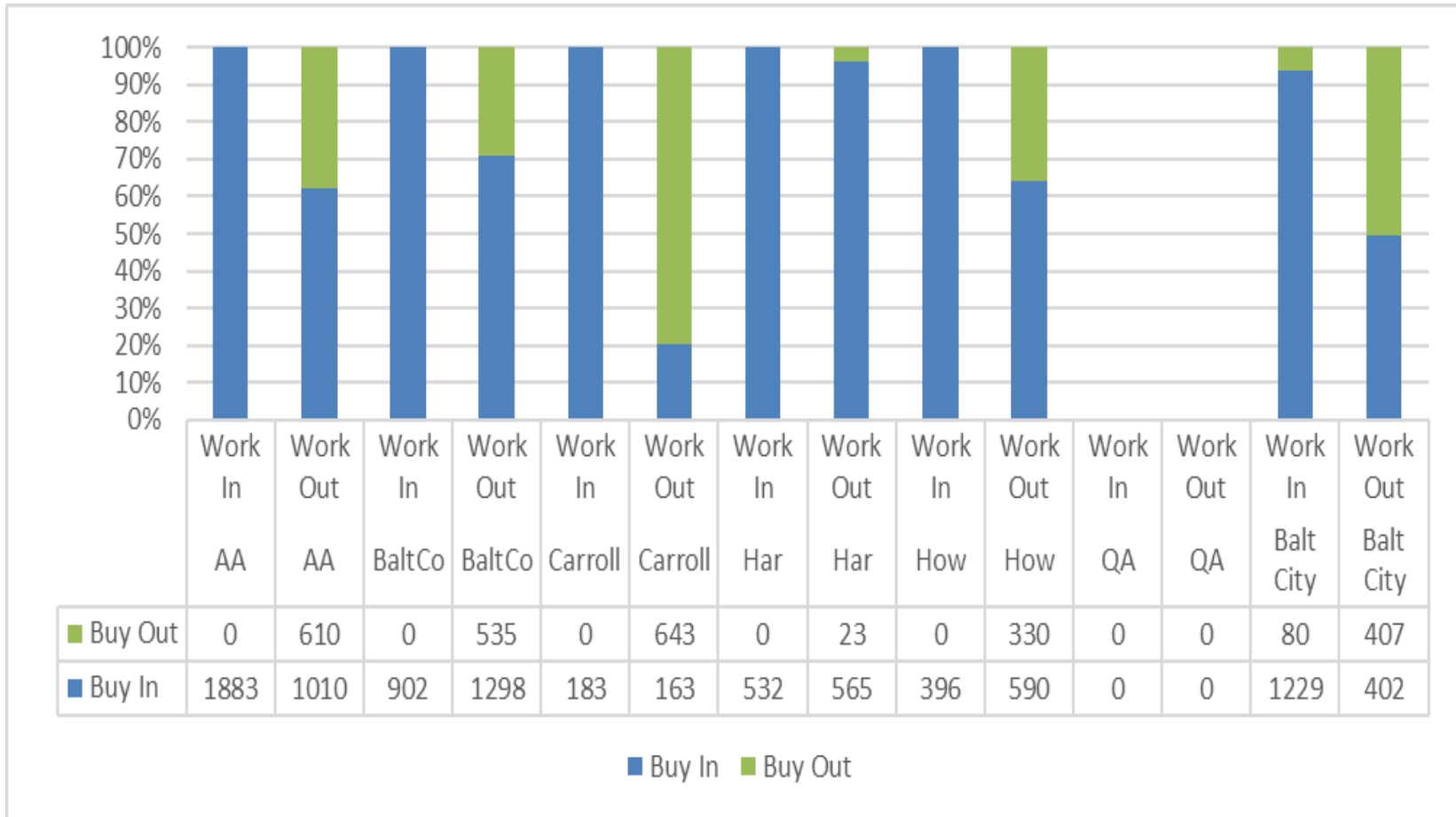
Shopping Trip by Work In/Work Out by Juris



Summary of Analysis of Consumer Spending (Shopping Trip)

- In most Jurisdictions, the vast majority of Work Ins are also Buy Ins.
- In Howard and Queen Anne's Counties, all the Work Ins are also Buy Ins.
- Furthermore, the majority of Work Outs in Anne Arundel, Baltimore, Harford, Howard, and Queen Anne's Counties are also Buy Ins.
- In Queen Anne's County, all the Work Outs are also Buy Ins.
- Carroll County and Baltimore City are exceptions: There, the large majority of Work Outs are also Buy Outs.

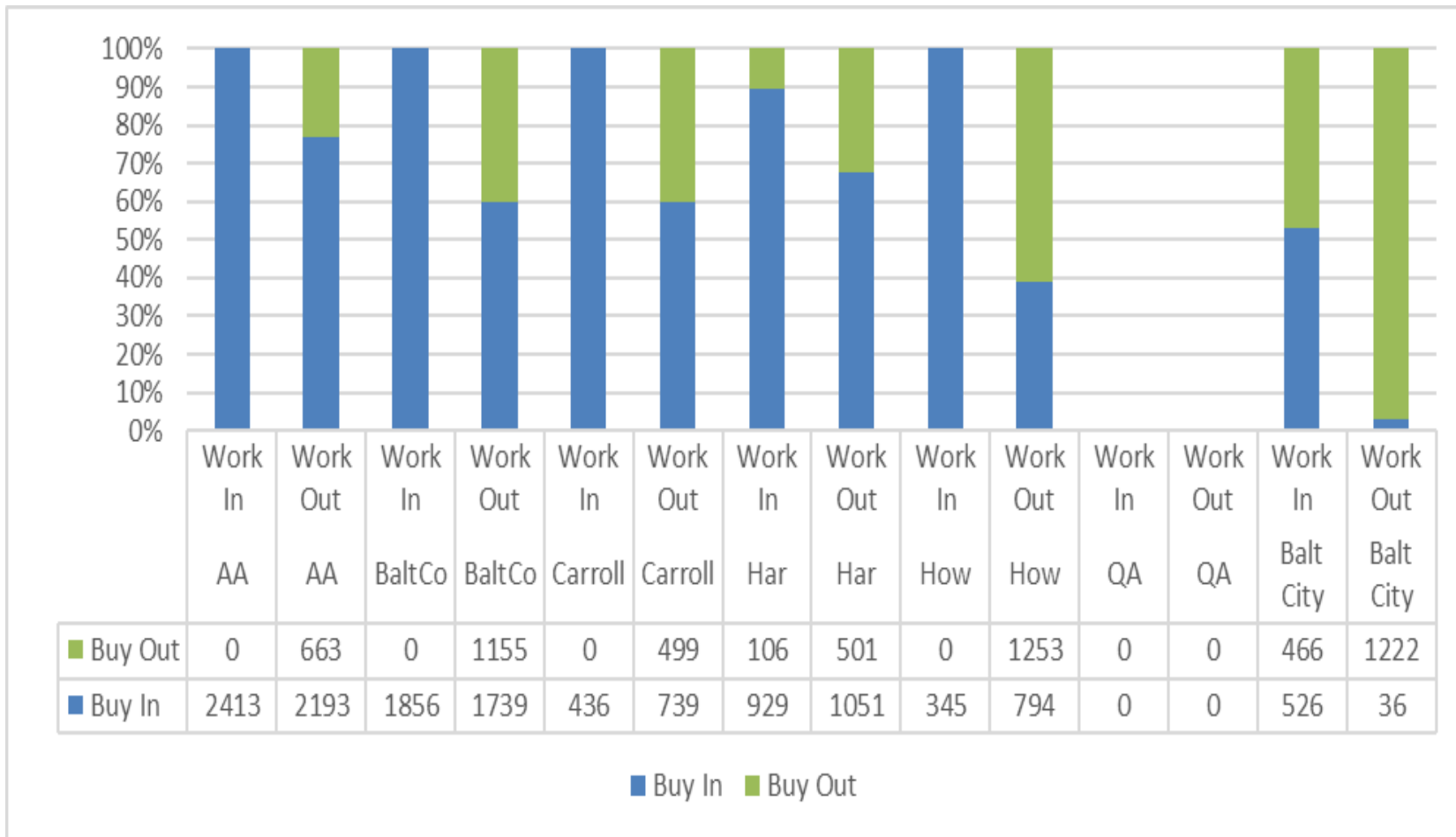
Health Care Trip by Work In/Work Out by Juris



Summary of Analysis of Consumer Spending (Health Care Trip)

- In most Jurisdictions, almost all Work Ins are Buy Ins, and the majority of Work Outs are, likewise, Buy Ins.
- Carrol County and Baltimore City are exceptions: There, most Work Outs are also Buy Outs.
- No Queen Anne's County Commuter recorded a Health Care Trip during the Survey; the results are the same for Work Ins and Work Outs.
- It's likely that the Queen Anne's results are due to its smaller population, which means it has a smaller number of commuters, which, in turn, reduces the likelihood that a commuter Health Care Trip would be captured by the Survey.
- While the results don't indicate that there are no commuter Health Care Trips in Queen Anne's County, they do suggest that there are fewer compared to other Baltimore region jurisdictions.

Buy Gas by Work In/Work Out by Juris



Summary of Analysis of Consumer Spending (Buy Gas)

- In most jurisdictions, almost all Work Ins are Buy Ins, and the majority of Work Outs are, likewise, Buy Ins.
- Carrol County and Baltimore City are exceptions: There, most Work Outs are also Buy Outs.
- No Queen Anne's County Commuter recorded a Gas Purchase Trip during the Survey; the results are the same for Work Ins and Work Outs.
- It's likely that the Queen Anne's results are due to its smaller population, which means it has a smaller number of commuters, which, in turn, reduces the likelihood that a commuter Gas Purchase Trip would be captured by the Survey.
- While the results don't indicate that there are no commuter Gas Purchase Trips in Queen Anne's County, they do suggest that there are fewer compared to other Baltimore region jurisdictions.

Another View of the Research Question: Commuters to Juris from Outside Juris by Juris

Juris	Total Commuters to Juris from Outside Juris
Anne Arundel	44,848
BaltCo	78,006
Carroll	5,309
Harford	11,270
Howard	33,633
Queen Anne's	2,499
BaltCity	91,735

Conclusions (Part 1)

- Whether commuters who work outside their home jurisdictions are also more likely to purchase goods and services outside their home jurisdictions depends on at least two factors:
 - 1) Household Income, and
 - 2) Particular Consumer Good or Service.
- In most jurisdictions, almost all commuters who work outside their home jurisdiction (80% - 90%) are from higher income (\geq \$50,000) households, and, therefore, have more disposable income. In Queen Anne's County, a smaller share (60%) of this group are from higher income households, which may reduce the number of commuter purchases outside the County.
- In most jurisdictions, almost all commuters who work in their home jurisdiction (70% - 90%) are also from higher income (\geq \$50,000) households. In Queen Anne's County, a significant share (90%) of this group are from higher income households, which may increase the number of commuter purchases inside the County.

Conclusions (Part 2)

- The geography of consumer spending, particularly among commuters who work outside their Home Jurisdictions, varies by the product or service being consumed.
- For Sit-Down Meals, there is a strong correspondence in all jurisdictions, such that most commuters who work inside their Home Jurisdictions also purchase their meals inside their Home Jurisdictions; and most commuters who work outside their Home Jurisdictions also purchase their meals outside their Home Jurisdictions. The most extreme cases were Harford and Queen Anne's Counties, where all commuters who work inside their Home Jurisdictions also purchase their meals inside their Home Jurisdictions, and all commuters who work outside their Home Jurisdictions also purchase their meals outside their Home Jurisdictions.
- The same pattern was seen for QuickStop Meals. Queen Anne's County, where no QuickStop Meals were reported, was an outlier. The likely explanation is lower consumer demand for Fast Food, which decreased the probability that the Survey would capture this type of trip.

Conclusions (Part 3a)

- Some consumer purchases were less affected by work location.
- Most commuters chose to make Shopping trips in their Home Jurisdictions, whether they worked inside or outside. Queen Anne's County was an extreme case: all Queen Anne's County commuters chose to shop in Queen Anne's County. Commuters from Carroll County and Baltimore City were an exception: most of those who worked outside their Home Jurisdictions opted to shop outside as well.
- Health Care trips follow a similar pattern. Once again, most commuters chose to obtain Health Care in their Home Jurisdictions. No Queen Anne's County Commuter recorded a Health Care Trip during the Survey; the likely explanation is the combination of its small population and the relative infrequency of Health Care trips. Commuters from Carroll County and Baltimore City were an exception: most of those who worked outside their Home Jurisdictions opted to obtain Health Care outside as well.

Conclusions (Part 3b)

- Trips to purchase Gas follow a similar pattern. Once again, most commuters chose to buy Gas in their Home Jurisdictions. No Queen Anne's County Commuter recorded a Buy Gas trip during the Survey; the likely explanation is the combination of its small population and the relative infrequency of Buy Gas trips. Commuters from Howard County and Baltimore City were an exception: most of those who worked outside their Home Jurisdictions opted to purchase Gas outside as well.

Conclusions (Part 4)

- It is clear that businesses in Queen Anne's County and other Baltimore region Jurisdictions are deprived of income when commuters from these jurisdictions travel to jobs in other jurisdictions, where they also buy goods and services, although, as has been shown, some types of consumer purchases are less affected by work location.
- But perhaps equally important as the commuters that these jurisdictions lose are the commuters from other jurisdictions that never arrive. In other words, there are large disparities among jurisdictions in how many outside commuters travel to each jurisdiction to work. If the presence of these commuters provides an infusion to local economies, then surely their absence is a lost opportunity that may explain, in part, the misfortunes of some local businesses.

For More Information

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