



# 2020 Vanpool Driver Survey Topline Highlights

**Commuter Connections Subcommittee**

**March 17, 2020**

**LDA Consulting  
with CIC Research**



## Survey Purpose – Primarily Operating Characteristics

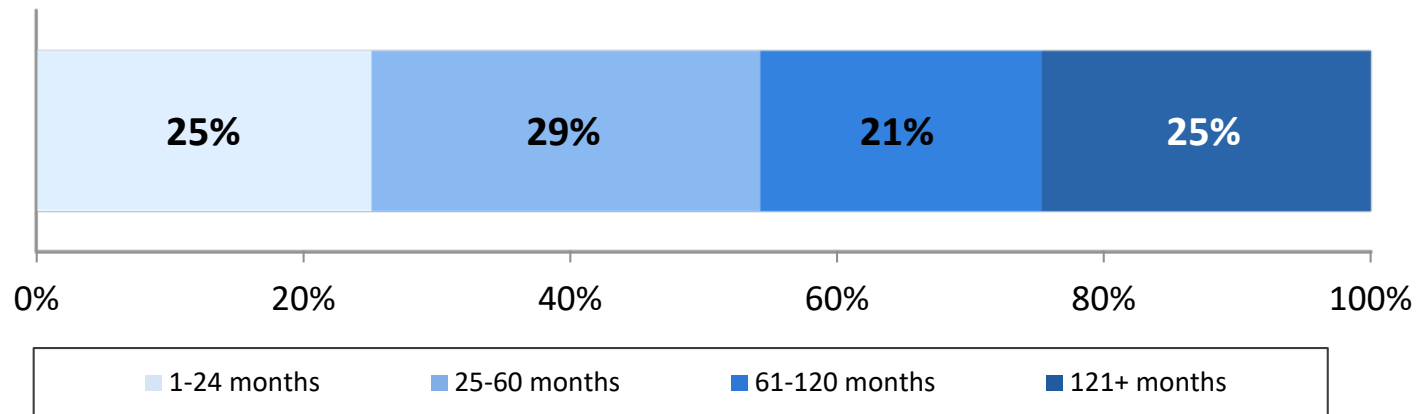
- Surveyed 361 drivers/coordinators of vanpools that start and/or end in the Washington metro region
    - 63% of respondents were primary drivers, 25% were back-up drivers; 11% were coordinators, 1% mentioned another VP role
  - Primary purpose of the survey was to collect data on current vanpool operations for COG planning purposes
    - Vehicle type/capacity/ownership
    - Duration of vanpool
    - Origin/destination
    - Pick-up and drop off locations
    - Vanpool formation time
    - Vanpool line haul distance
  - Also collected data on VP services used, VP issues of concern to drivers, and interest in autonomous and hybrid vehicles
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## Survey Methodology – Jan-Feb 2020

- Conducted through emailed invitation to individual drivers/coordinators, providing link to survey website
- Survey team compiled driver emails from existing databases:
  - Commuter Connections, GWRC, PRTC, Enterprise databases
  - COG, GWRC, and PRTC databases were combined/deduplicated as much as possible – COG sent invitations via email
  - Enterprise sent separate email invitation to its VPs, with instructions NOT to take the survey if already responded to COG – conducted additional deduping after survey
  - Note – survey excluded VPs that were not in one of these databases and VPs that were part of large operator fleets for which driver info could not be obtained; thus results cannot be assumed to represent all Washington region vanpools
- 361 responses – 240 COG, 121 Enterprise – Response rate 20%+

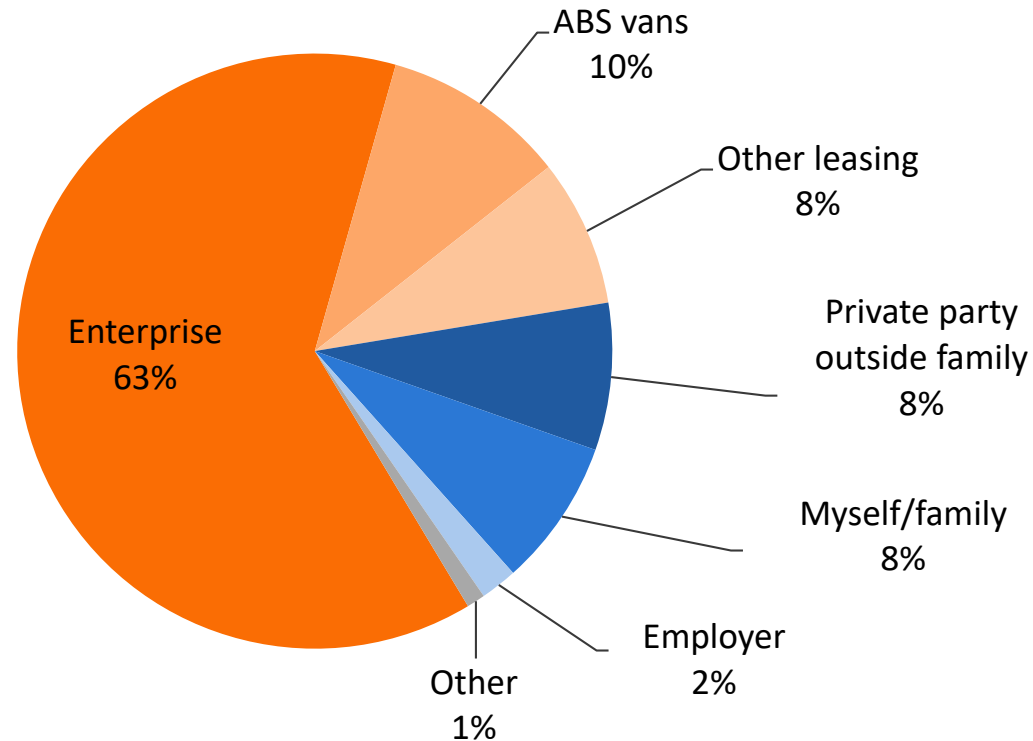
# Vanpools Surveyed Had Been in Operation for an Average of 72 months (6 years)

25% had been operating for 2 years or less; 25% had been operating for more than 10 years



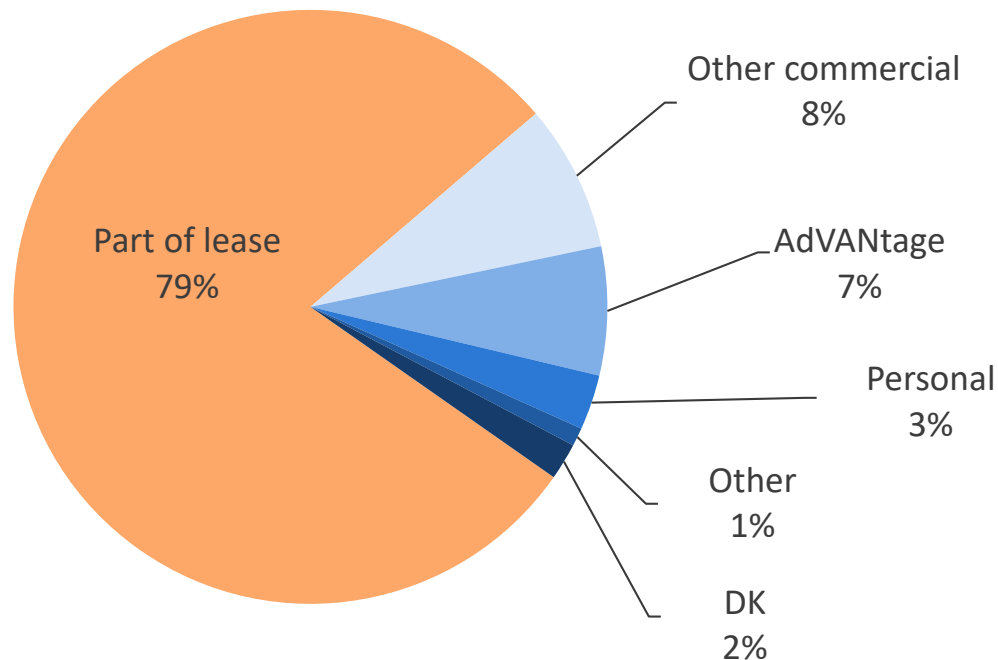
# More than Eight in Ten (81%) Vanpools Used a Leased Van; 8% Said Vehicle Was Owned by the Driver/Family

63% of vanpools responding were leased from Enterprise

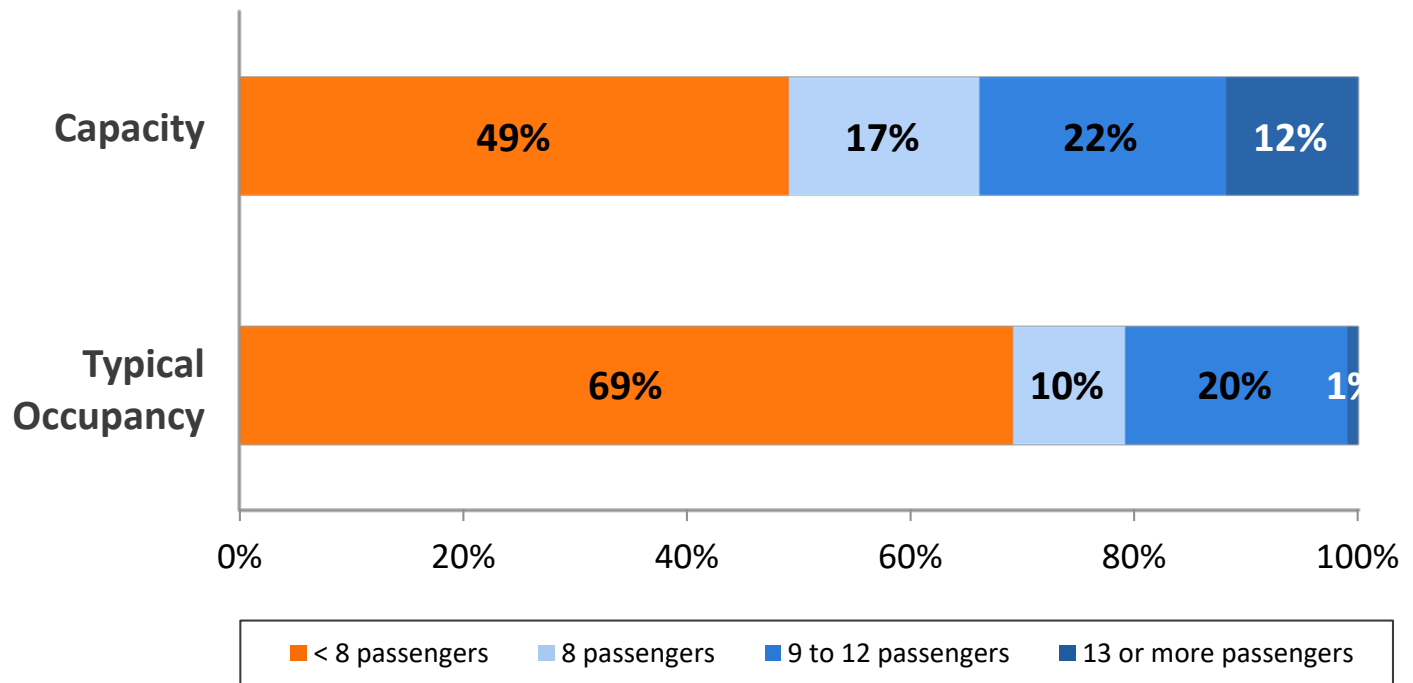


# 95% of Respondents Said Vanpool Insurance Was Paid by Van Owner/Lease Agency – Only 5% Said They Paid the Insurance Directly

79% had insurance included in lease payment, 8% said the van was covered by another commercial policy, and 7% were covered by the Virginia AdVANTage vanpool self-insurance program



Vanpool Average Capacity (Including the Driver) Was 8.9 Passengers; Typical Average Occupancy Was 6.7  
66% of the vans had a capacity of 8 or fewer occupants; 12% had a capacity of 13 or more occupants



Van capacity  
n = 358

Typical  
occupancy count  
n = 358

Q5c What is the passenger capacity of the van (including the driver) if every seat is filled?  
Q5d How many people, including the driver, usually ride in the vanpool?

# Three-quarters of the Vanpools Originated in VA; VA Also Was the Dominant Destination (46%)\*

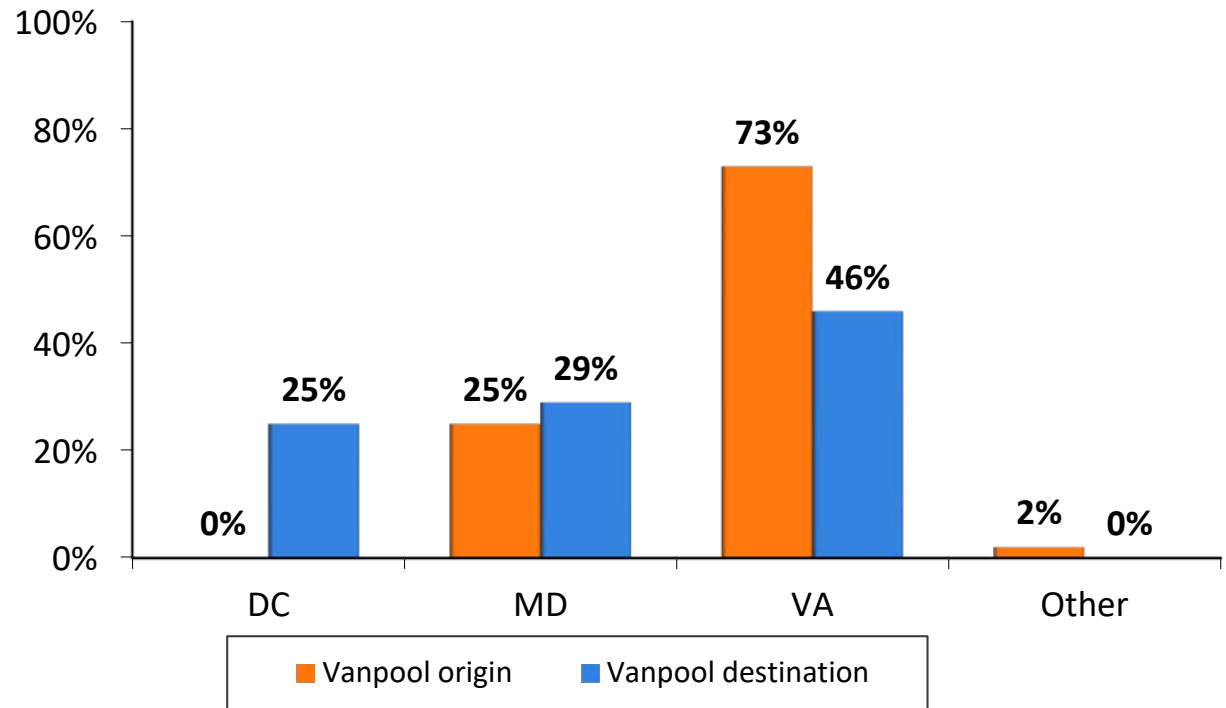
25% of vans were destined to DC and 29% traveled to MD worksites

## Top Origins

Fredericksburg, VA (15%)  
Stafford, VA (15%)  
Fairfax, VA (8%)  
Prince William, VA (8%)  
Frederick/Urbana, MD (7%)  
Loudoun, VA (7%)

## Top Destinations

Fairfax, VA (28%)  
Washington, DC (25%)  
Montgomery, MD (20%)  
Arlington, VA (11%)



**\* NOTE that the sample drew from several VA-only databases, thus these origin-destination percentages likely do NOT reflect all regional vanpools**

Origin  
n = 357

Destination  
n = 319

Q8 In what home area does your van originate (i.e., where is your van parked overnight)?  
Q11 Where is the van parked during the day?



# Most Vanpools Traveled Very Early, Avoiding Rush-hour; 76% Made Only One Morning Pick-up Stop and 66% Made Only One Drop-Off Stop (at the Workplace)

## ■ Vanpool Pick-up

- 60% of drivers left their homes at or before 5:30 am and 81% left home by 6:00 am
- 76% made one pick-up stop at a central meeting place; 21% made two stops; 3% made three or more stops
- Vanpool formation took an average of 24 minutes

## ■ Vanpool Drop-off

- 72% of vans arrived at work by 7:00 am
- 66% said all passengers were dropped off at the location where the van was parked during the day; 34% made one or more additional drop-off stop before parking for the day

Pick-up  
n = 359

Drop-off  
n = 319

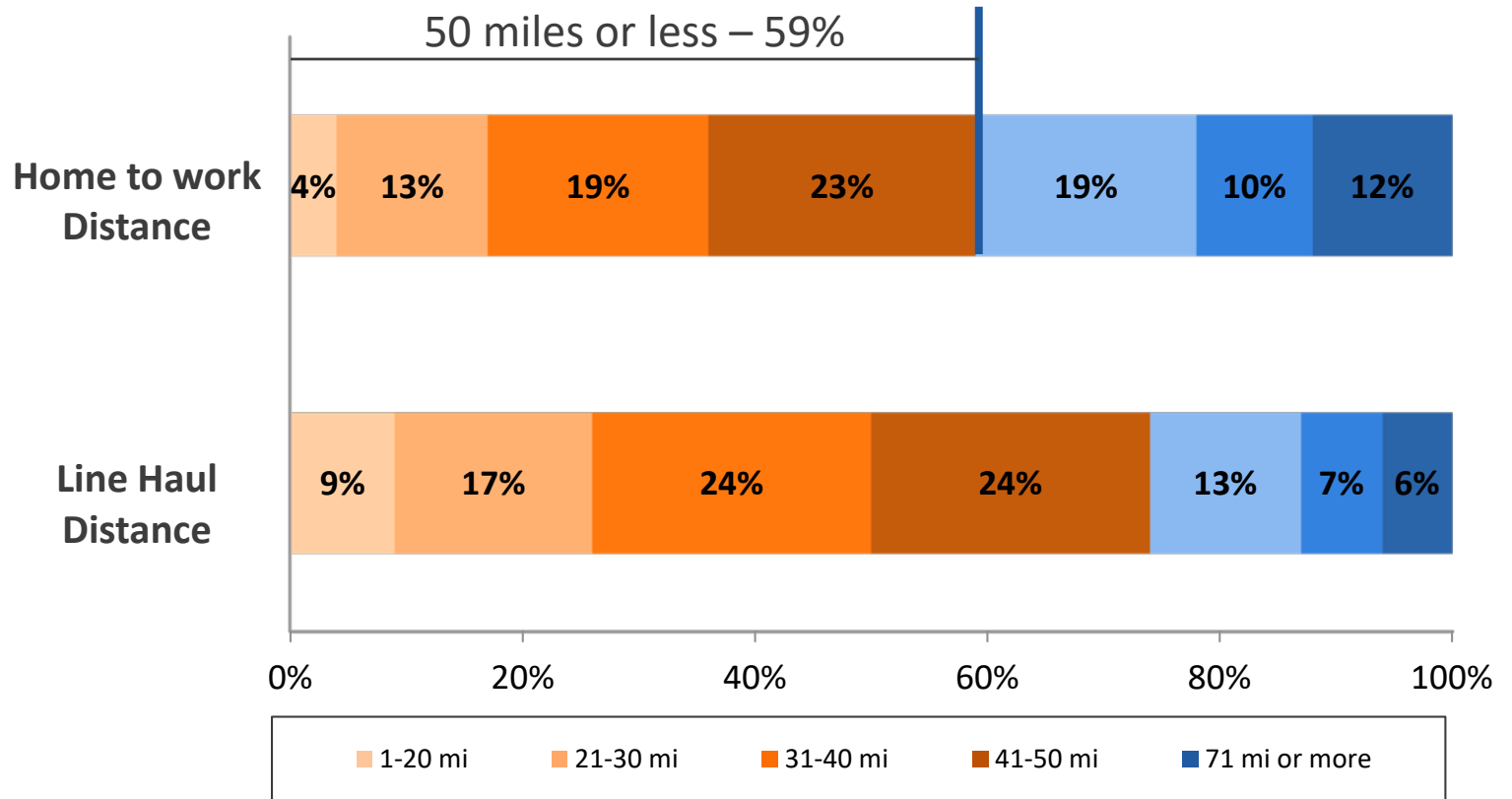
Q9 How many stops does your van make in the morning to pick up passengers?

Q11a Does the van drop off passengers in the morning at another location Before [the workday parking location] or is the parking location the only drop off?

Q12. At what time do the following morning vanpool activities occur?

# Vanpool Drivers Lived an Average of 48 Miles From Their Workplaces

They drove part of the distance alone, to the rider pick-up stops; the average “line haul” distance with all riders in the van was 42 miles



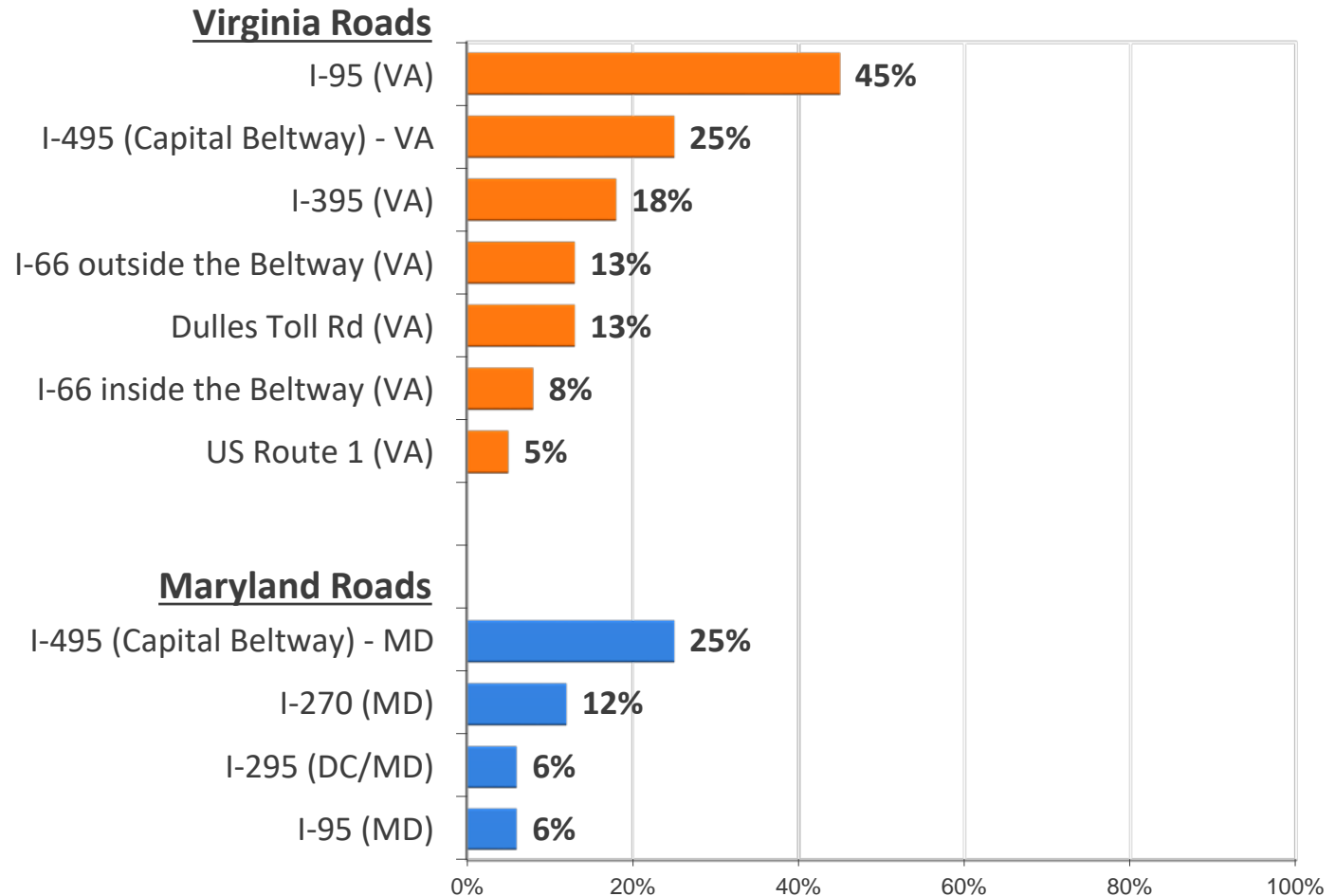
Driver's home to work distance  
n = 328

Line haul distance  
n = 330

Q13 Approximately how many miles is each of the following segments of your vanpool trip? Miles from driver's residence to worksite/parking location; Miles from pick-up location to worksite [or first drop-off stop]

# Nearly Half of Vanpools Traveled on I-95 in Virginia; A Large Share Used the Beltway in VA (25%) or MD (25%)

79% said their vanpool used an HOV or HOT/Express lane for part of the trip



n = 351,  
Multiple  
responses  
permitted

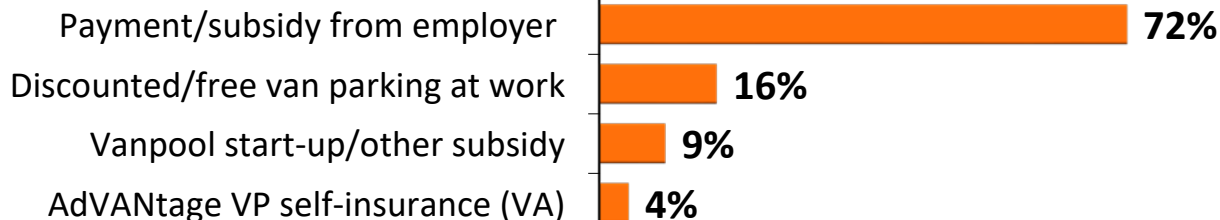
Q14 What major roadways does the van take for the trip to work?

Q15. Does the vanpool use an HOV lane or HOT/Express Lane for any portion of the trip?

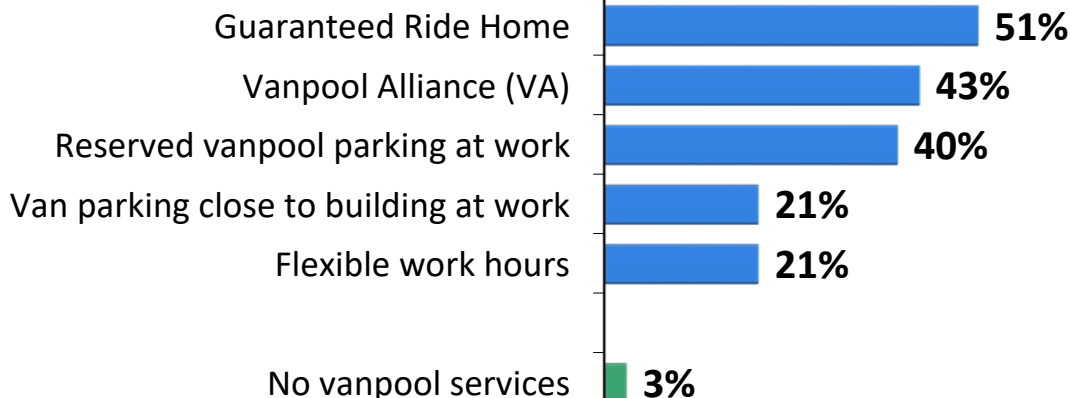
# 97% of Respondents Received Vanpool Services or Benefits from Employer or Other Organization

Nearly three-quarters received a subsidy from their employer and 40% had reserved parking close to the building at work

## Financial benefit



## Other support benefit



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

### Monthly Vanpool Parking Fee

Free for all – 62%

Free for VP – 18%

\$1 to \$99 – 6%

\$100 to \$199 – 6%

\$200 or more – 8%

### 59% received VP formation assistance

Employer – 48%

Other org – 11%

Formation assistance n = 341

Services/benefits n = 341

Parking charge n = 343

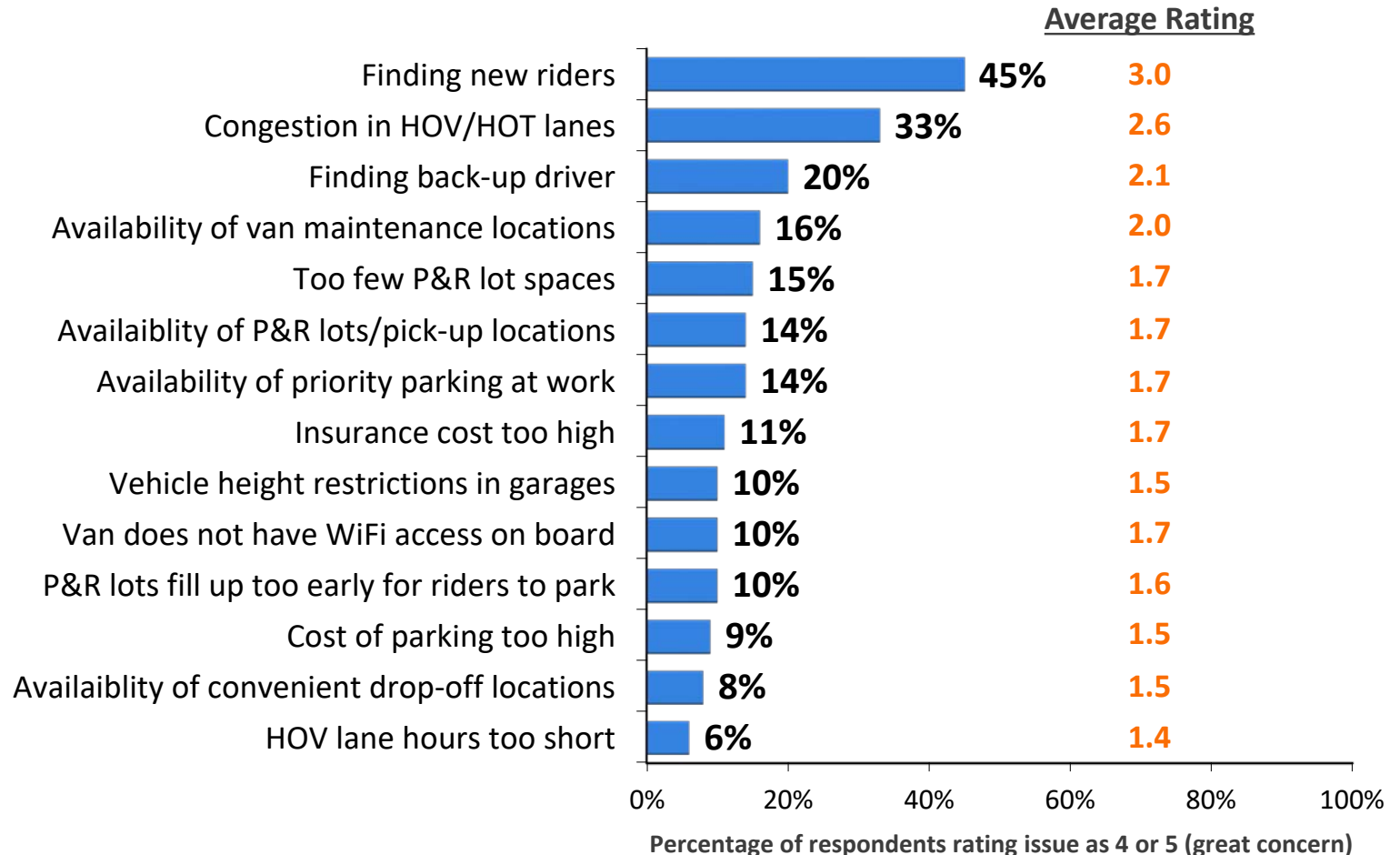
Q16. In forming your vanpool, did you receive assistance from your employer or another organization?

Q17. Do you or does your vanpool receive any of the following services or benefits?

Q18. What is the monthly parking fee for your van where it is parked during the day?

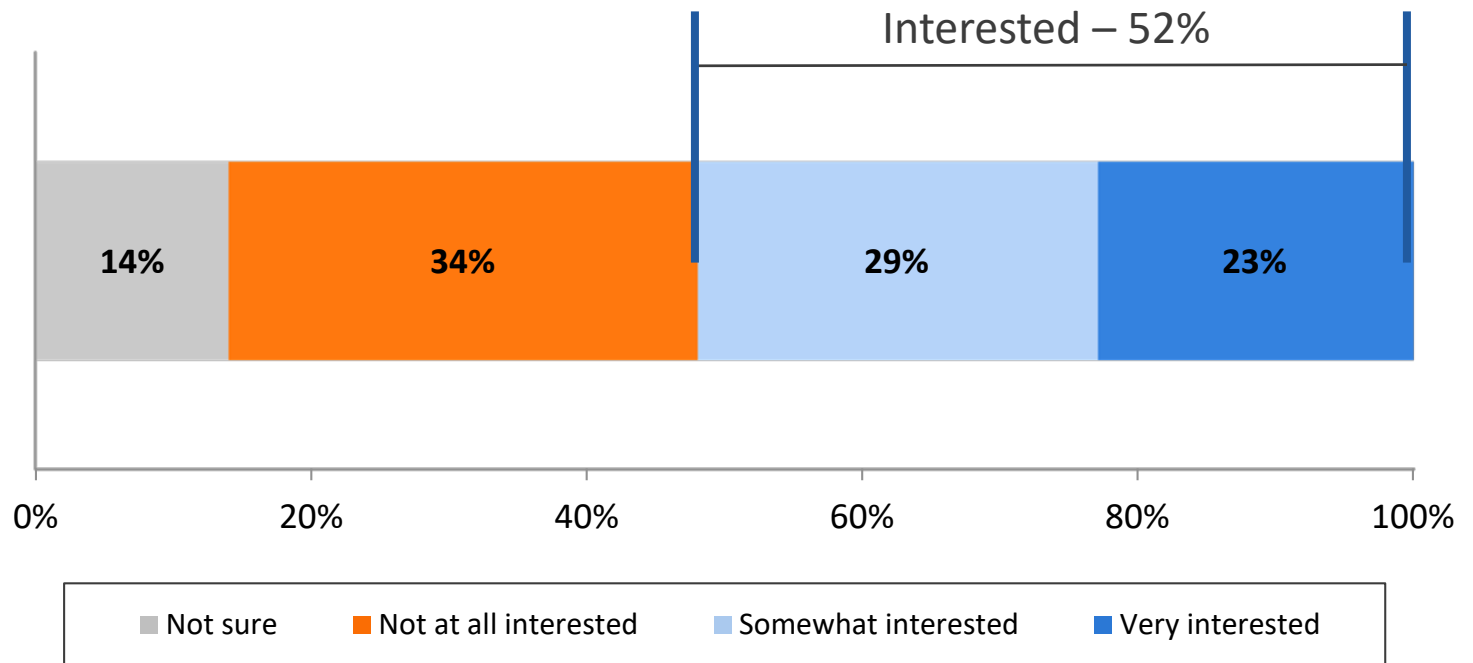
# VP Drivers' Biggest Concern Was Finding New Riders – 45% Rated This as a 4 or 5 (great concern)

33% were concerned about congestion in HOV/HOT lanes and 20% said finding back-up drivers was a concern



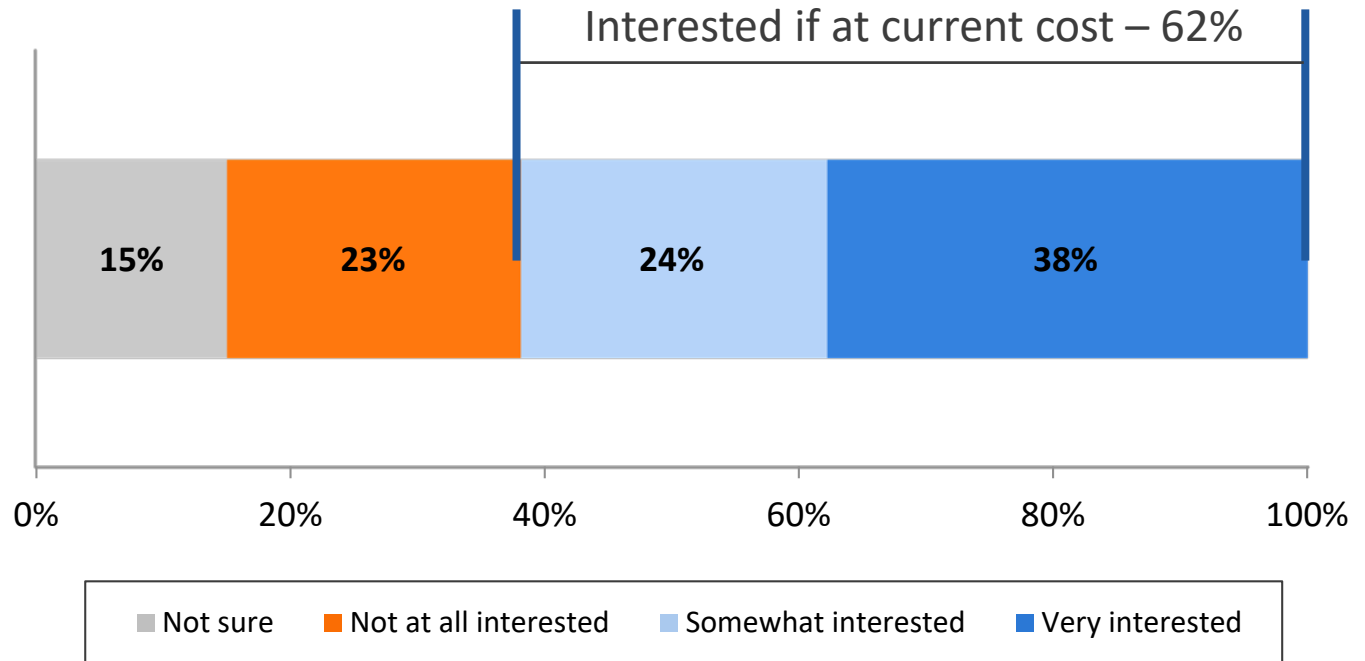
# About Half of Vanpool Drivers Would be Interested in Using an Autonomous (Self-Driving) Vehicle

Drivers who were not interested overwhelming said they did not trust the new technology and/or would not feel safe without a live driver



# Drivers Were More Receptive to Electric/Hybrid Vans – 62% Would be Interested in Using this Type of Vehicle if The Cost Was the Same as Current Costs

If the cost was more than the current cost, 15% would pay up to 10% more and 4% would pay up to 20% more



## Willing to Pay Additional Cost?

Pay 10% more – 15%

Pay 20% more – 4%

Not sure – 9%

No – 49%

Not interested in hybrid at all – 23%

Interest in electric/hybrid vehicle  
n = 347

Q19c How interested would you be in using an electric (plug-in) or hybrid van, if the van purchase or lease cost was the same as you pay now?

Q19d. If the cost for an electric or hybrid van was more than you pay now, what additional cost would you be willing to pay to use this type of van?



## Questions?

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