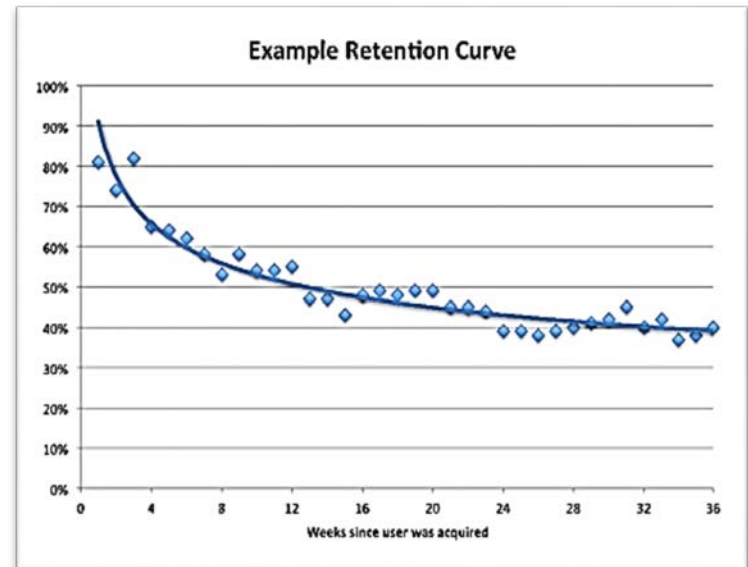


Commuter Connections 2016 Retention Rate Survey Highlights

Commuter Connections
Subcommittee
July 19, 2016

LDA Consulting
with CIC Research





Methodology

Survey Objective and Methodology

- Survey of random sample of 989 commuters who participated in GRH or received CC services between 2008 and June 2014
- Collect data for TERM analysis
 - Estimate % of commuters who made alt mode shifts and were “retained” in those modes
 - Apply “retained” credit to GRH and Commuter Oper Center

- Data collected
 - CC programs used
 - First and last CC “activity” year
 - Current modes and modes before services
 - Drive alone users – any previous alt mode and when shifted to DA
 - Alt mode users – Reasons for continued alt mode use and influence of CC services



Survey Analysis Divided Respondents into Categories by “Program Used” and “Last Activity” Date

3 programs

- GRH only – Received only GRH
- Non-GRH only – Received only non-GRH service
- GRH/Non-GRH – Received GRH AND non-GRH service

3 last activity dates

(Defined by database)

- 2008-2010
- 2011-2012
- 2013-2014

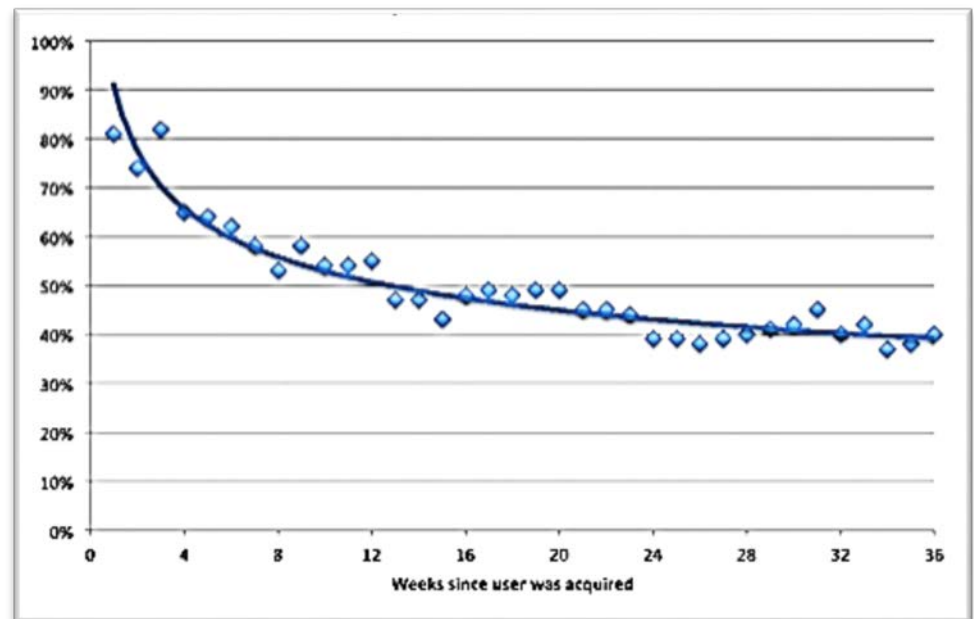
Last Activity
Year

2008-2010
n = 341

2011-2012
n = 421

2013-2014
n = 227

OBJECTIVE; Develop “**Retention Curve**” of declining alt mode use by year since last activity

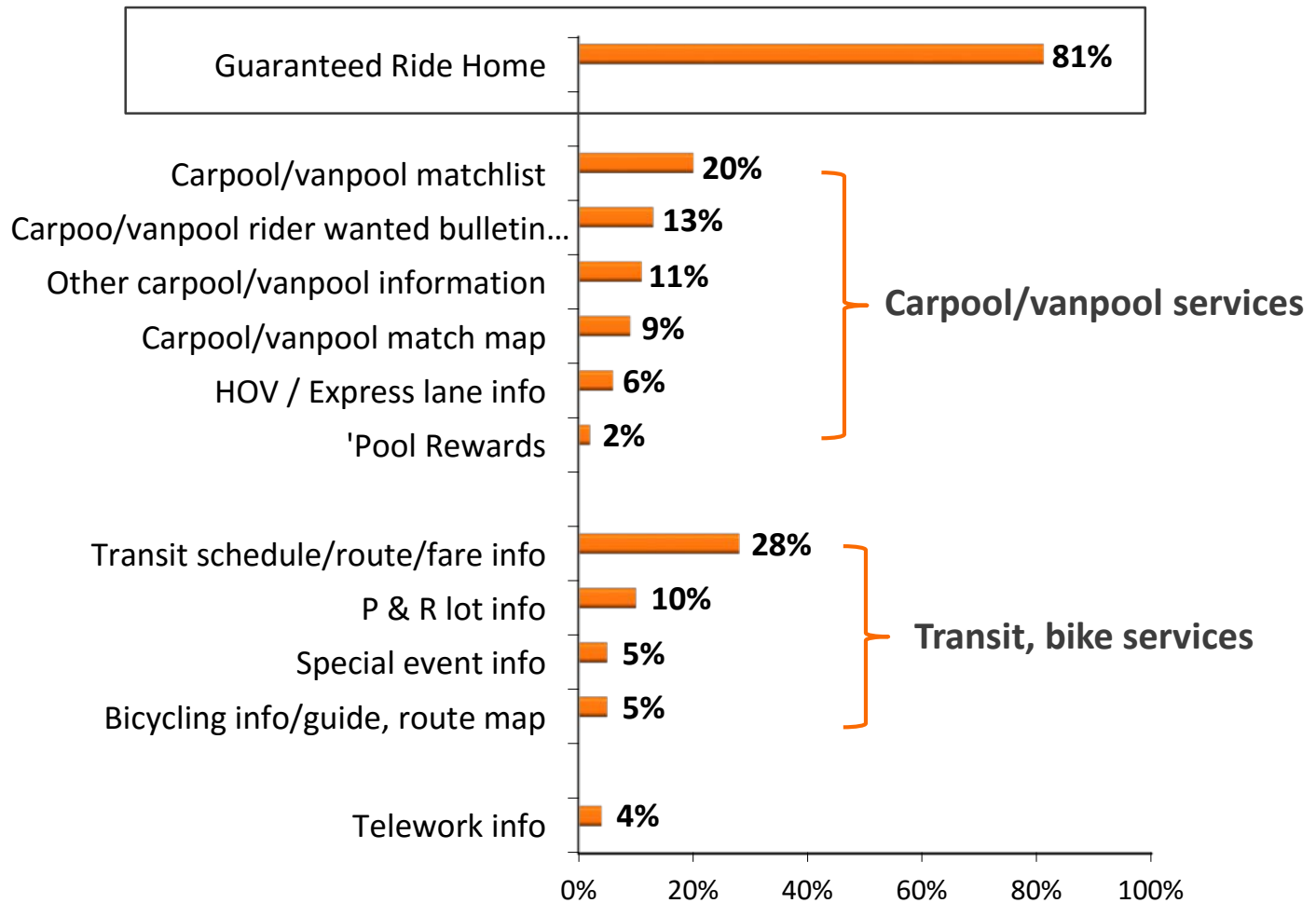




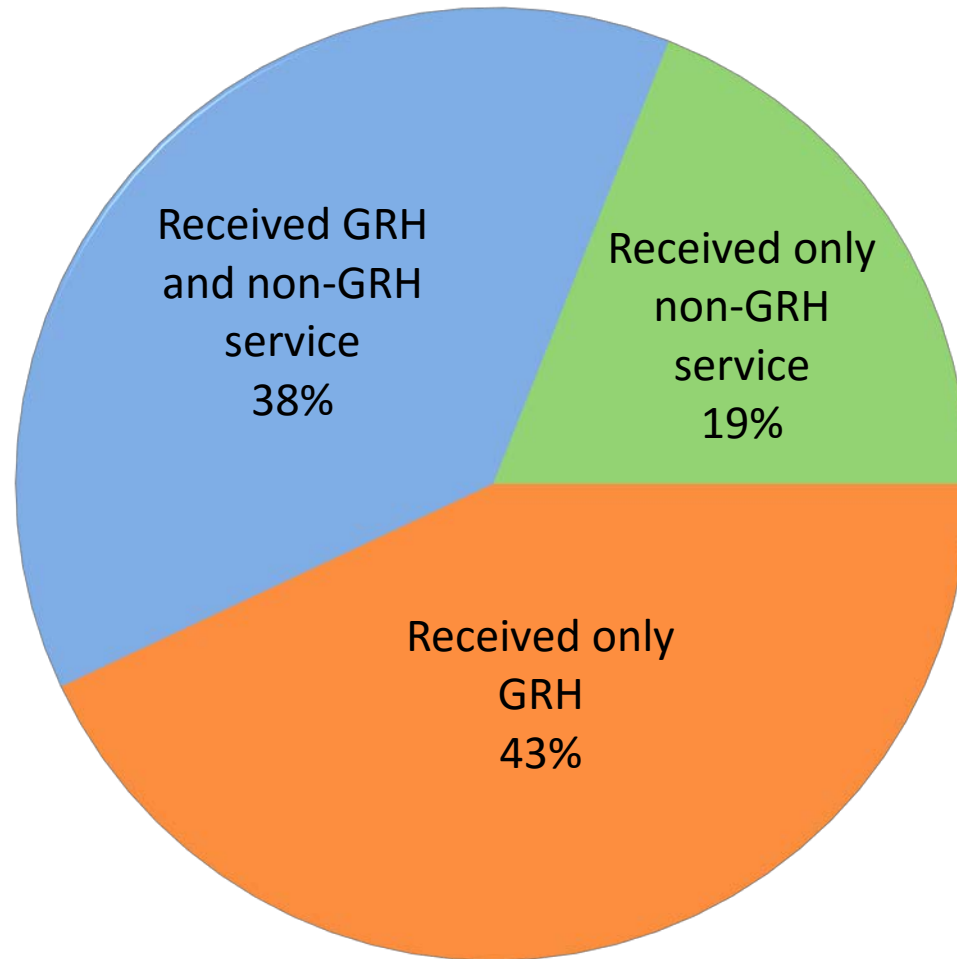
Services Received –
What and When

Eight in Ten Respondents Participated in GRH

Four in ten respondents received a carpool/vanpool service; One-third received a transit or bike service; 4% got telework info

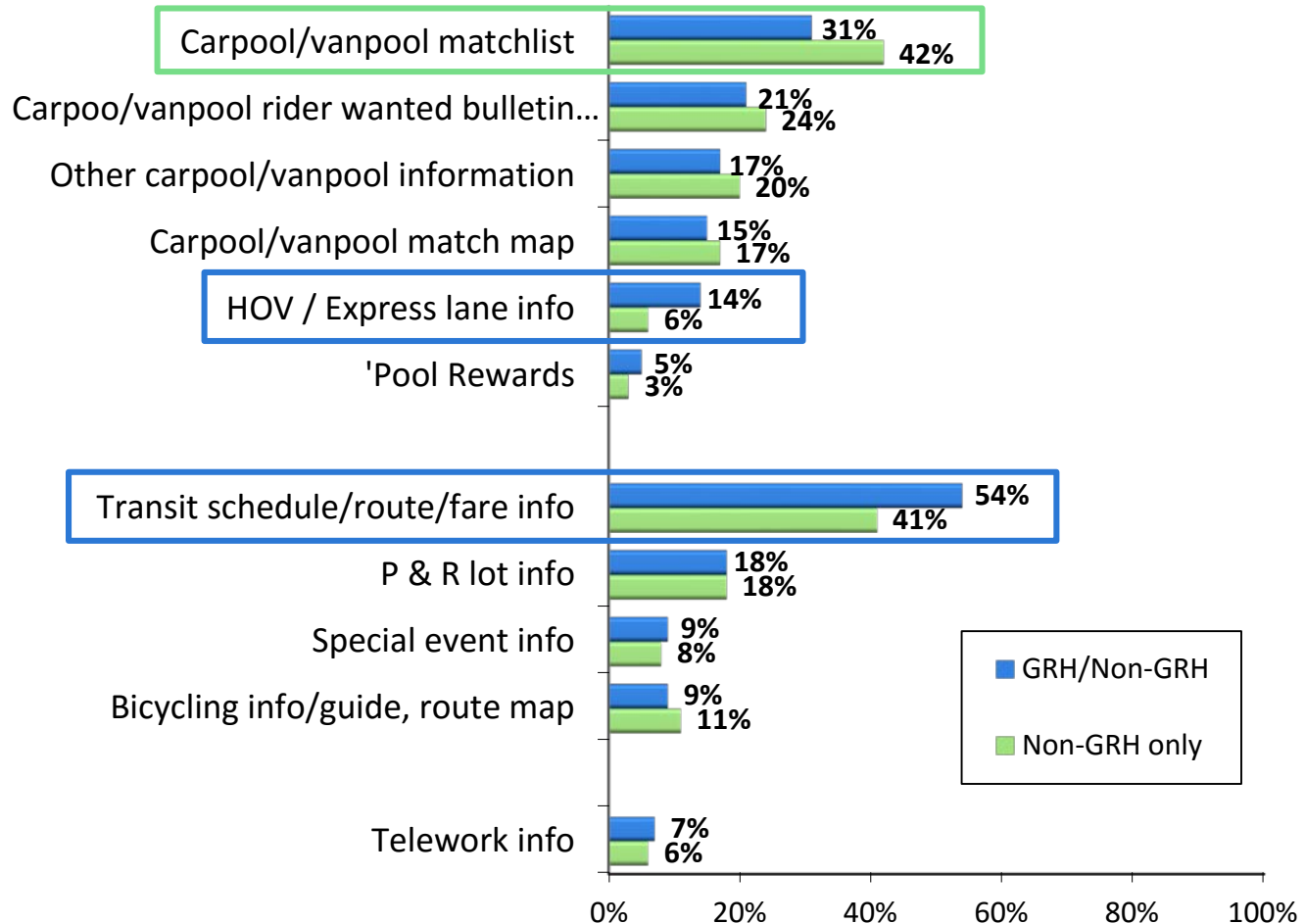


GRH Respondents were Almost Evenly Divided Between GRH Only and GRH/Non-GRH; 19% of All Respondents Received Only a Non-GRH Service



GRH/Non-GRH Respondents Received Somewhat Different Non-GRH Services than Did Non-GRH Only

GRH/Non-GRH – more transit, Non-GRH Only – more ridematch



GRH/Non-GRH
n = 383

Non-GRH Only
n = 173

Q1/Q2 Which of the following services have you accessed, received, or requested from Commuter Connections?

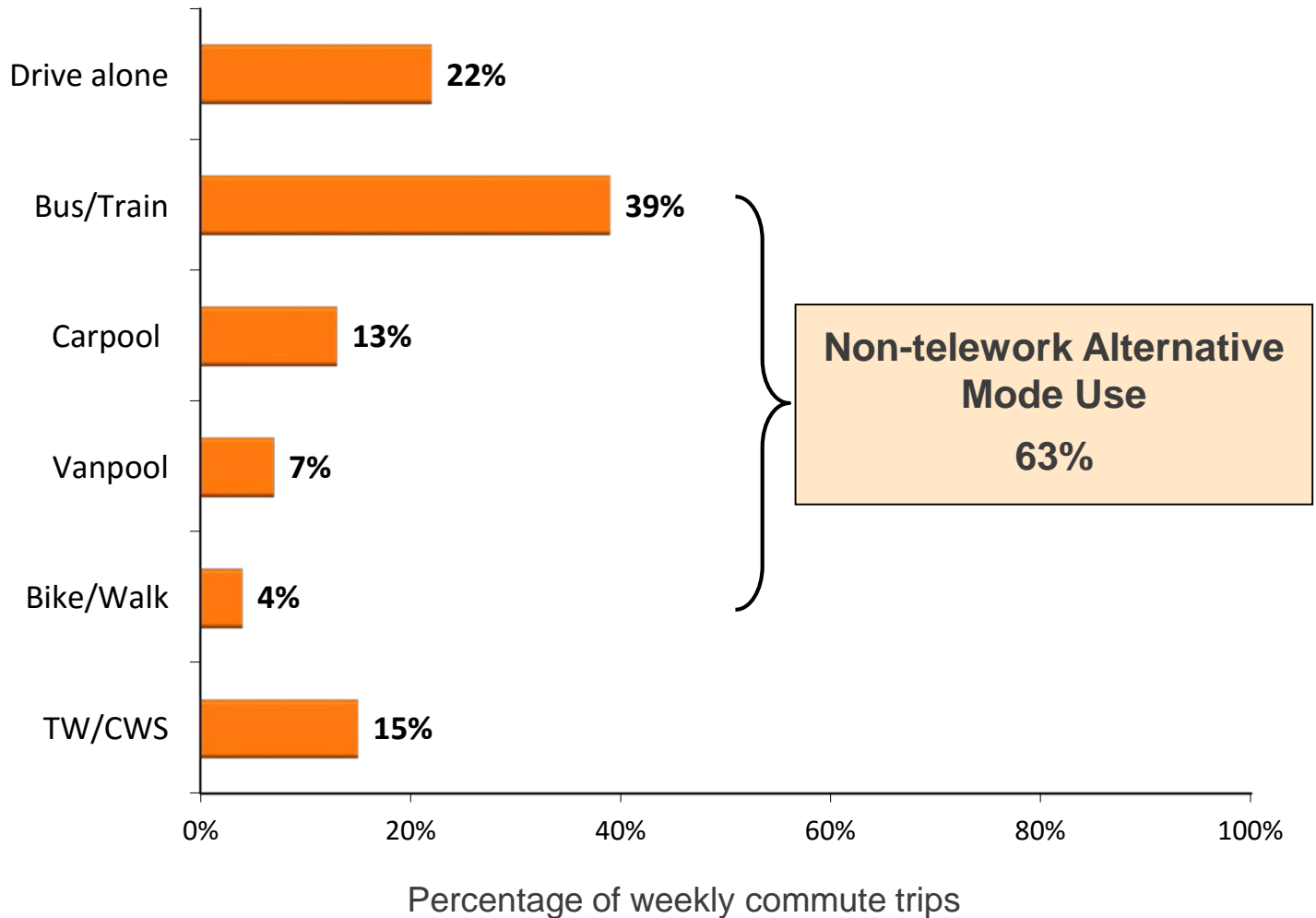


Current Commute Patterns

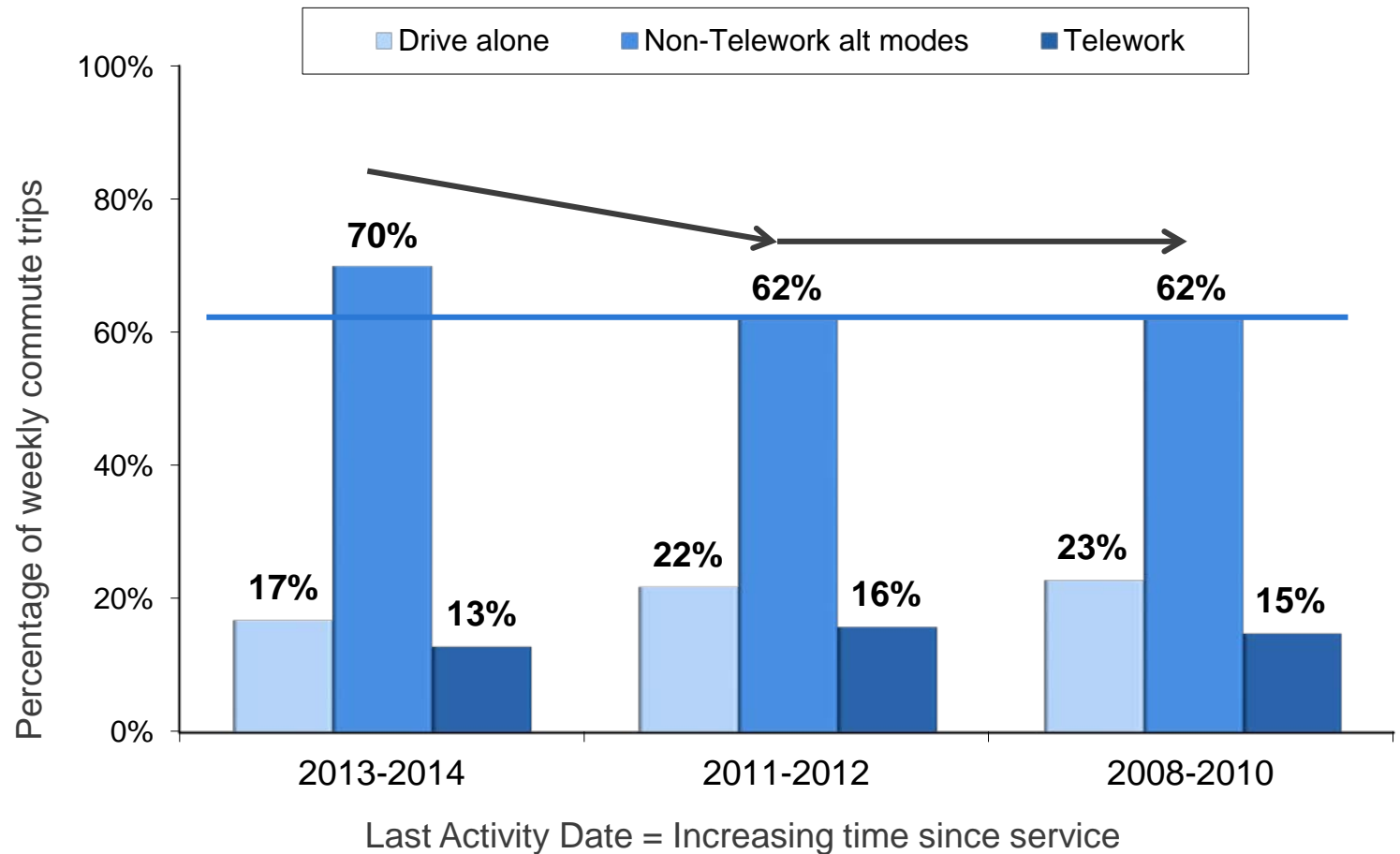


Respondents Used Non-telework Alternative Modes for 63% of Commute Trips at the Time of the Survey

They teleworked for 15% of weekly commute days



Current Alternative Mode Share Was Higher for Respondents with 2013-2014 Last Activity Date, but Was the Same for 2011-2012 and 2008-2010 Groups



Last Activity Year

2008-2010
n = 341

2011-2012
n = 421

2013-2014
n = 227

Q15 Thinking about a TYPICAL week, Monday through Friday, how do you get to work?

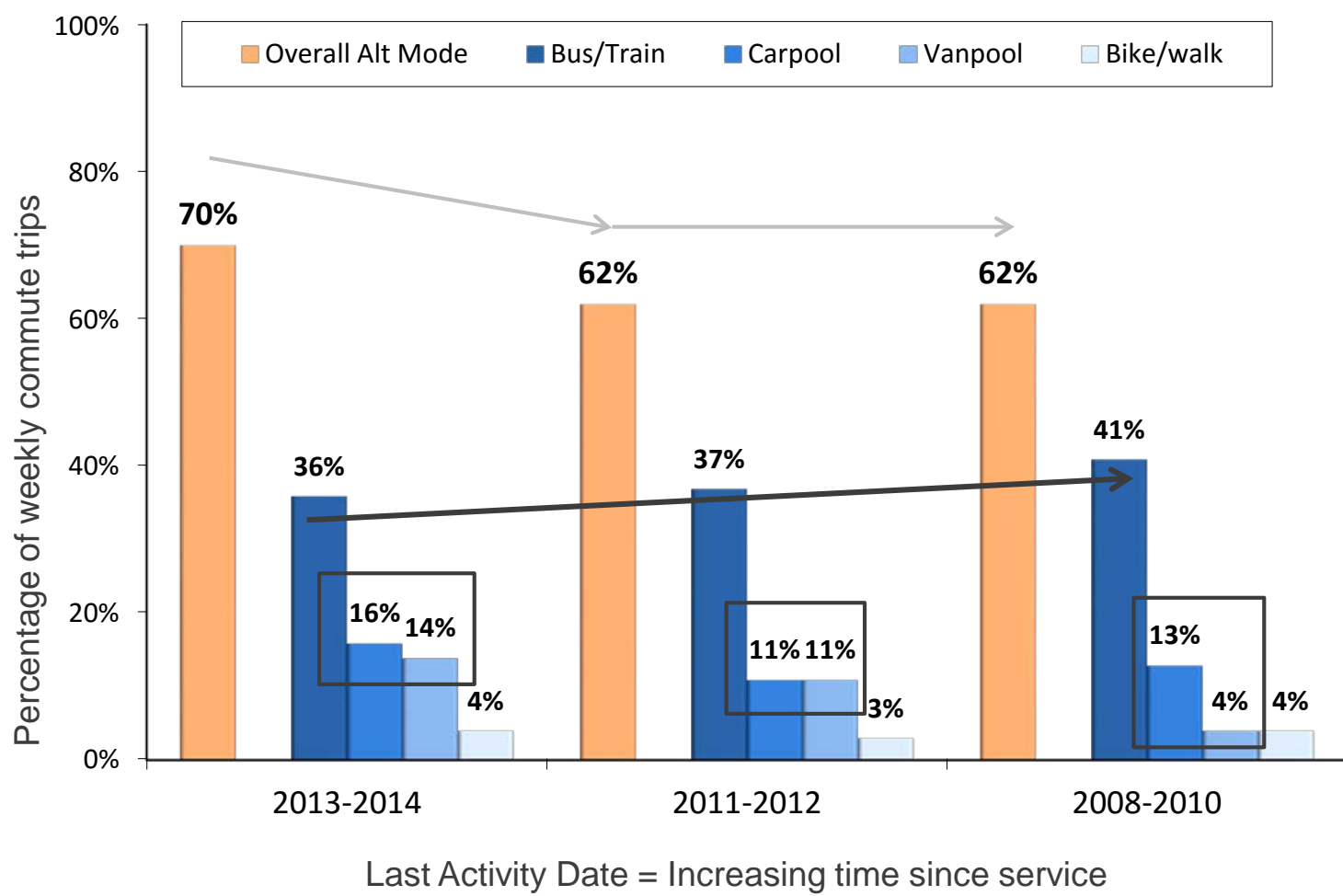
Carpool and Vanpool Use Declined with Increasing Time Since Receiving Service, but Transit Use Was Higher for Respondents with Earlier Last Activity Year

Mode Change Over Time

- Transit +5%
- Carpool -3%
- Vanpool -10%
- Bike/walk No change

Last Activity Year

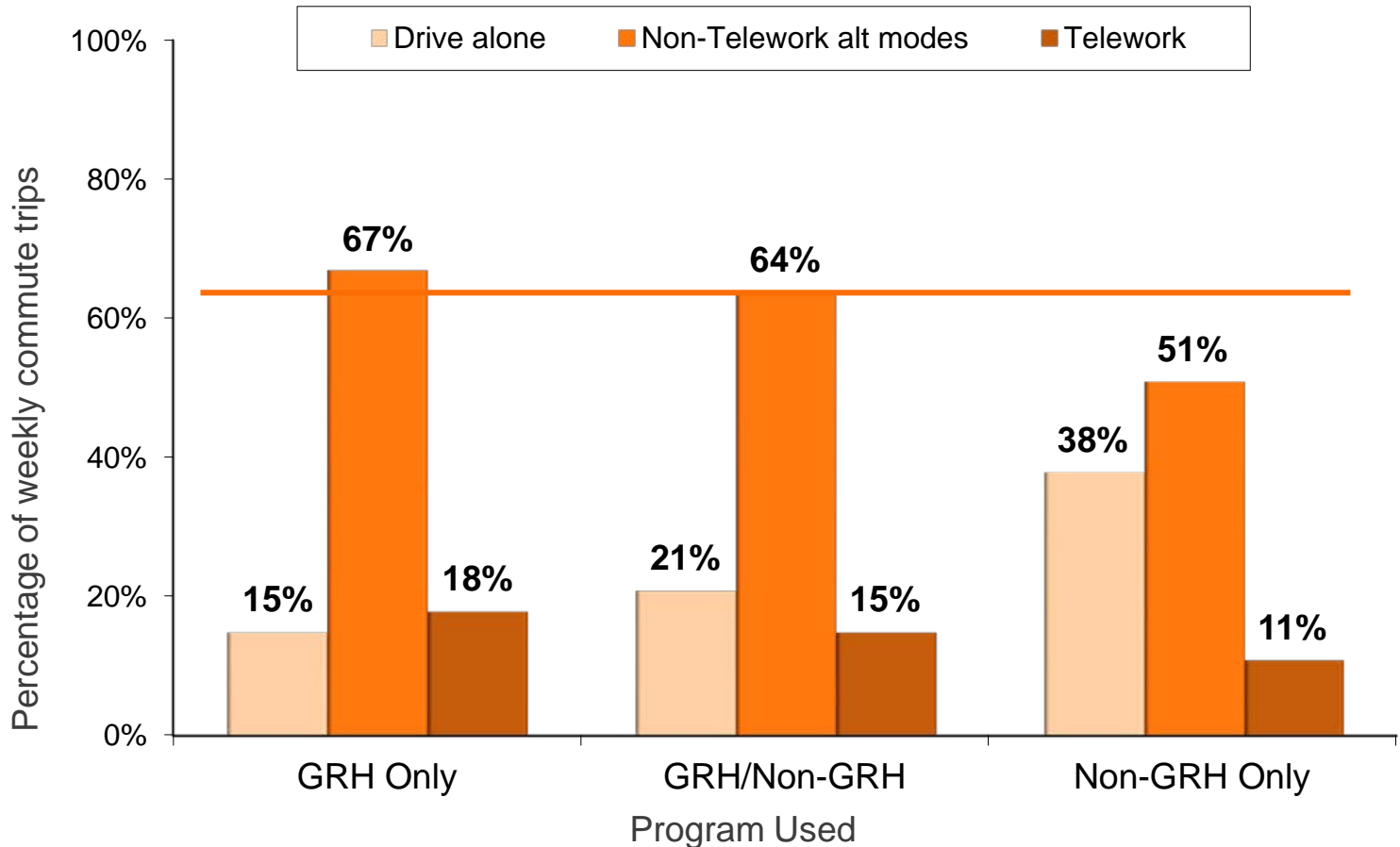
- 2008-2010
n = 341
- 2011-2012
n = 421
- 2013-2014
n = 227



Q15 Thinking about a TYPICAL week, Monday through Friday, how do you get to work?

Respondents Who Participated in GRH, Either Alone or With Other CC Services, Had Higher Non-telework Alternative Mode Use at the Time of the Survey

GRH users also had higher telework use



CC Program Used

GRH Only
n = 433

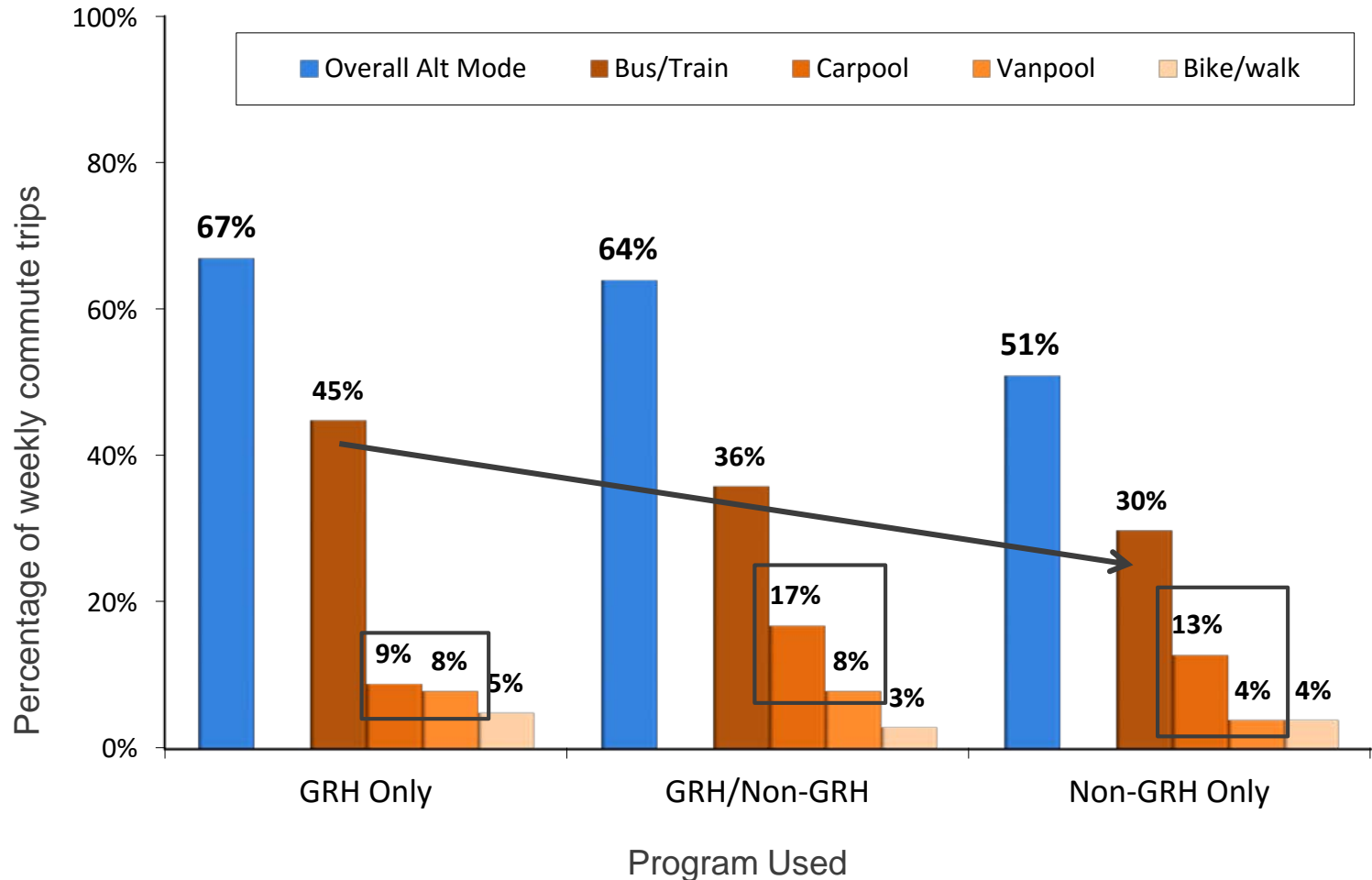
GRH/Non-GRH
n = 383

Non-GRH Only
n = 173

Q15 Thinking about a TYPICAL week, Monday through Friday, how do you get to work?

Q1/Q2 Which of the following services have you accessed, received, or requested from Commuter Connections?

Current Transit Use Was Highest for GRH Only Respondents; Carpool Use was Higher for Respondents Who Had Received Non-GRH Services



CC Program Used

GRH Only
n = 433

GRH/Non-GRH
n = 383

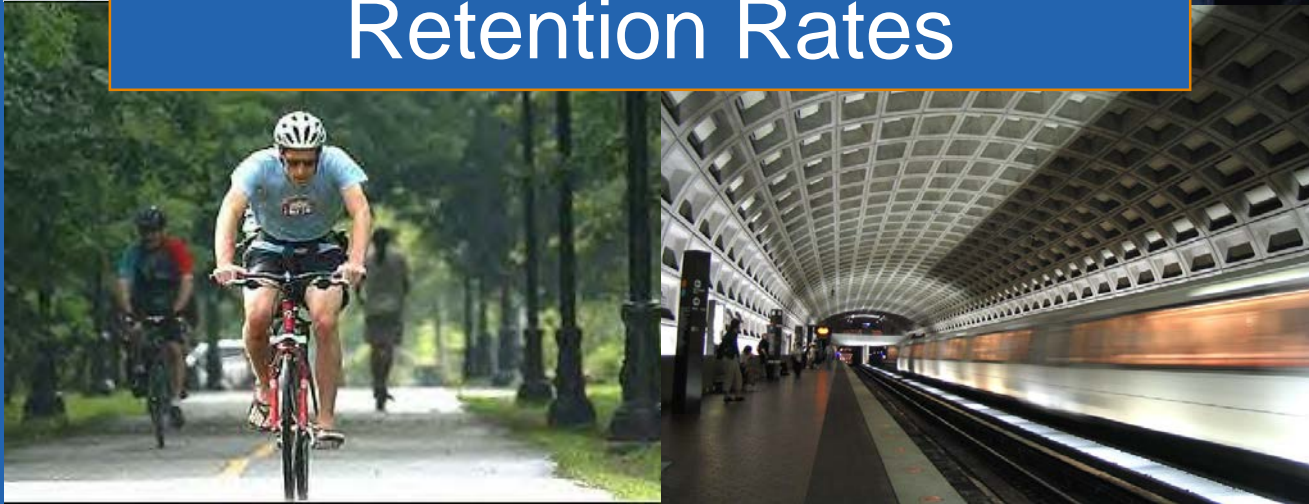
Non-GRH Only
n = 173

Q15 Thinking about a TYPICAL week, Monday through Friday, how do you get to work?

Q1/Q2 Which of the following services have you accessed, received, or requested from Commuter Connections?

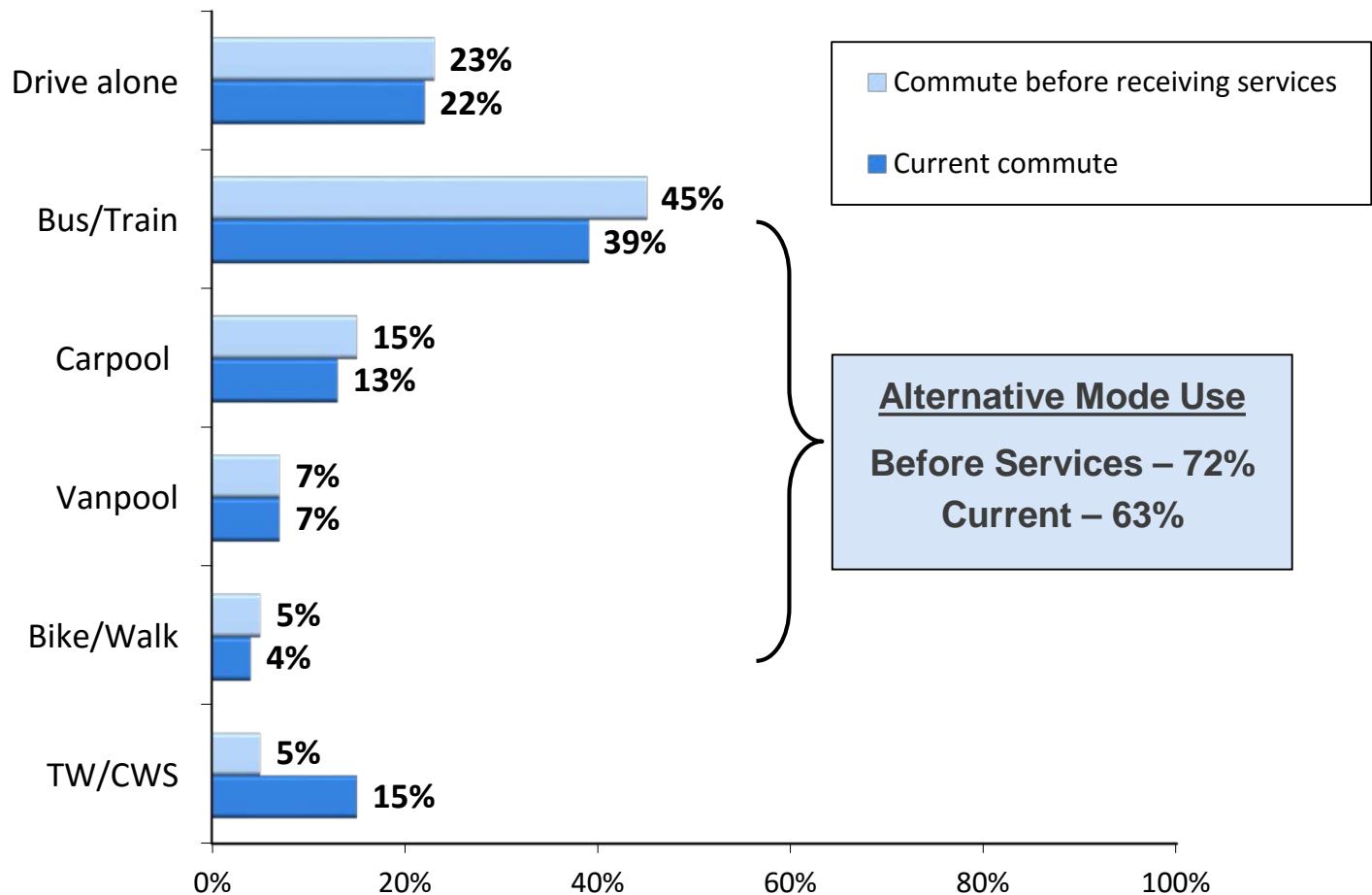


Previous Commute and Retention Rates



Current Non-telework Alternative Mode Use (63%) was Lower than the Use “Pre-Service” (72%); TW Use Grew

Alt mode use decline was primarily transit; modest carpool drop

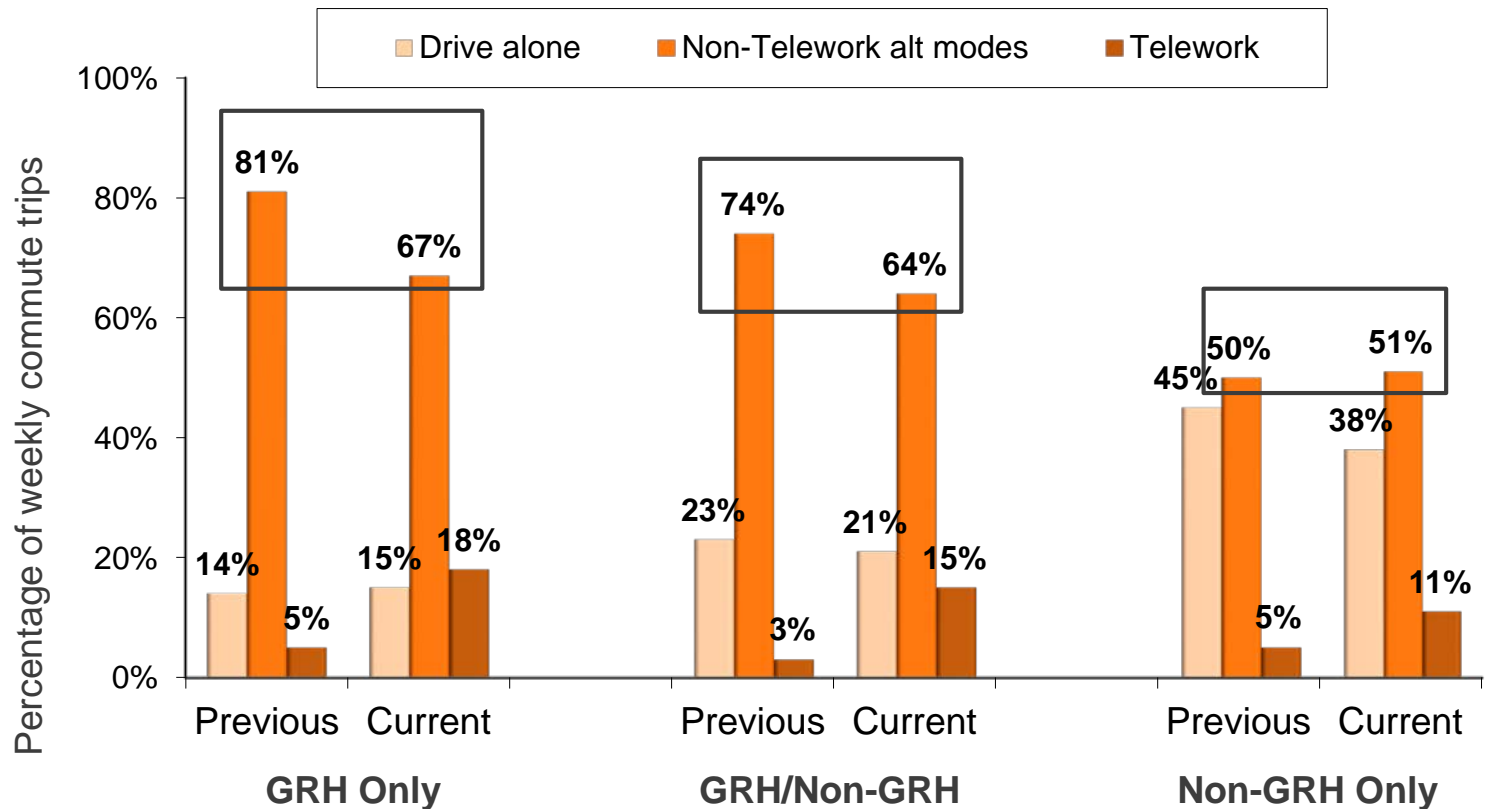


Q15 Thinking about a TYPICAL week, Monday through Friday, how do you get to work?

Q24/Q25/Q30 Before you [registered for GRH, first got information from Commuter Connections] how many weekdays did you use each of the listed types of transportation to get to work?

GRH Respondents Had Greater Drop in Alt Mode Use from Pre-Service (Previous) Mode to Current Mode than Did Respondents who Received GRH

But telework use grew more for GRH respondents, so GRH users' drive alone mode share did not change substantially



CC Program Used

GRH Only
n = 433

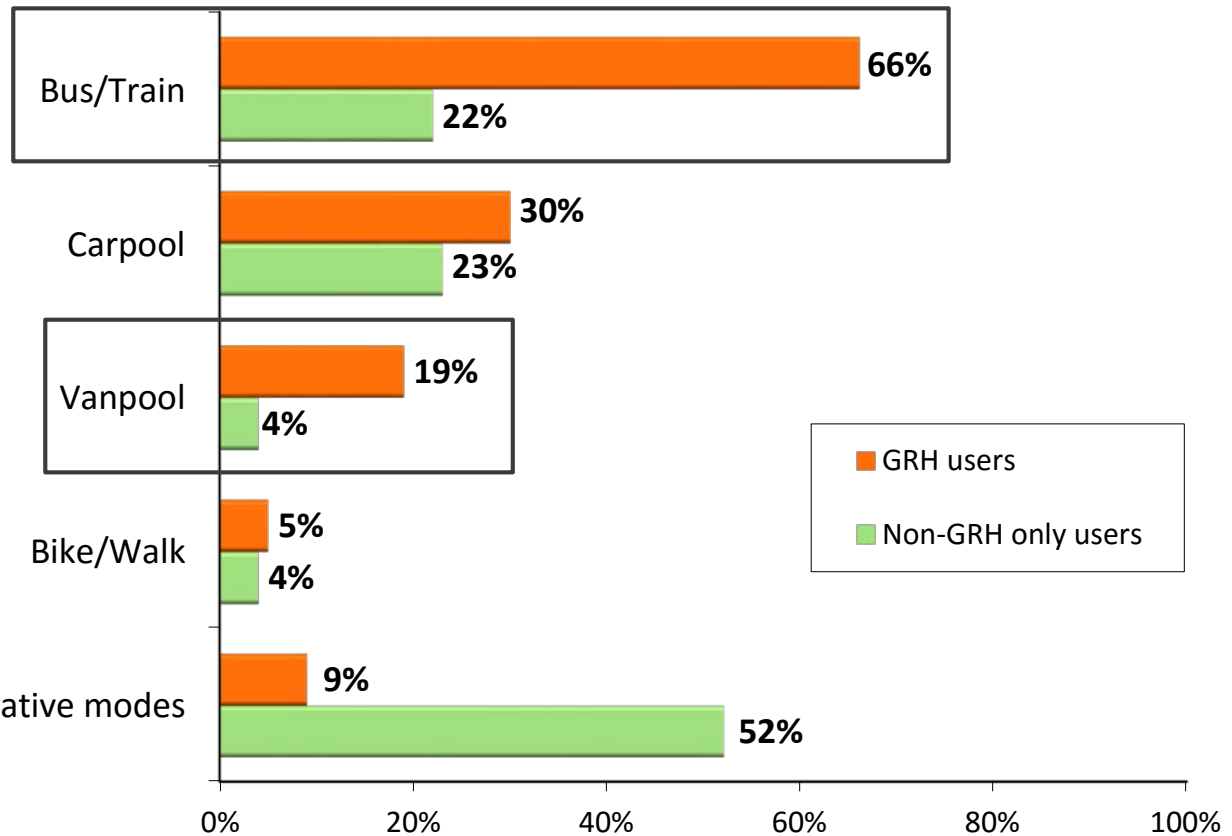
GRH/Non-GRH
n = 383

Non-GRH Only
n = 173

Q15 Thinking about a TYPICAL week, Monday through Friday, how do you get to work?

Q24/Q25/Q30 Before you [registered for GRH, first got information from Commuter Connections] how many weekdays did you use each of the listed types of transportation to get to work?

91% of GRH Respondents Who Drove Alone at the Time of the Survey Used Alternative Modes While in GRH; Among Non-GRH Only Respondents, 48% Used Alt Modes After Receiving CC Services



CC Program Used

GRH Users
n = 130

Non-GRH Only
n = 53

Multiple responses permitted for mode use

Q20 Which types of transportation did you use while you were registered for GRH?

Q31 In the time since you first got commute information from Commuter Connections, did you use any of the following types of transportation to get to work, even if only on a trial or temporary basis?

Retention Rate Definition and Calculation

Retained Commuter – Commuter changed to a new alternative mode to receive or after receiving CC services and continued using the new alternative mode until the time of the survey

Current alternative mode use

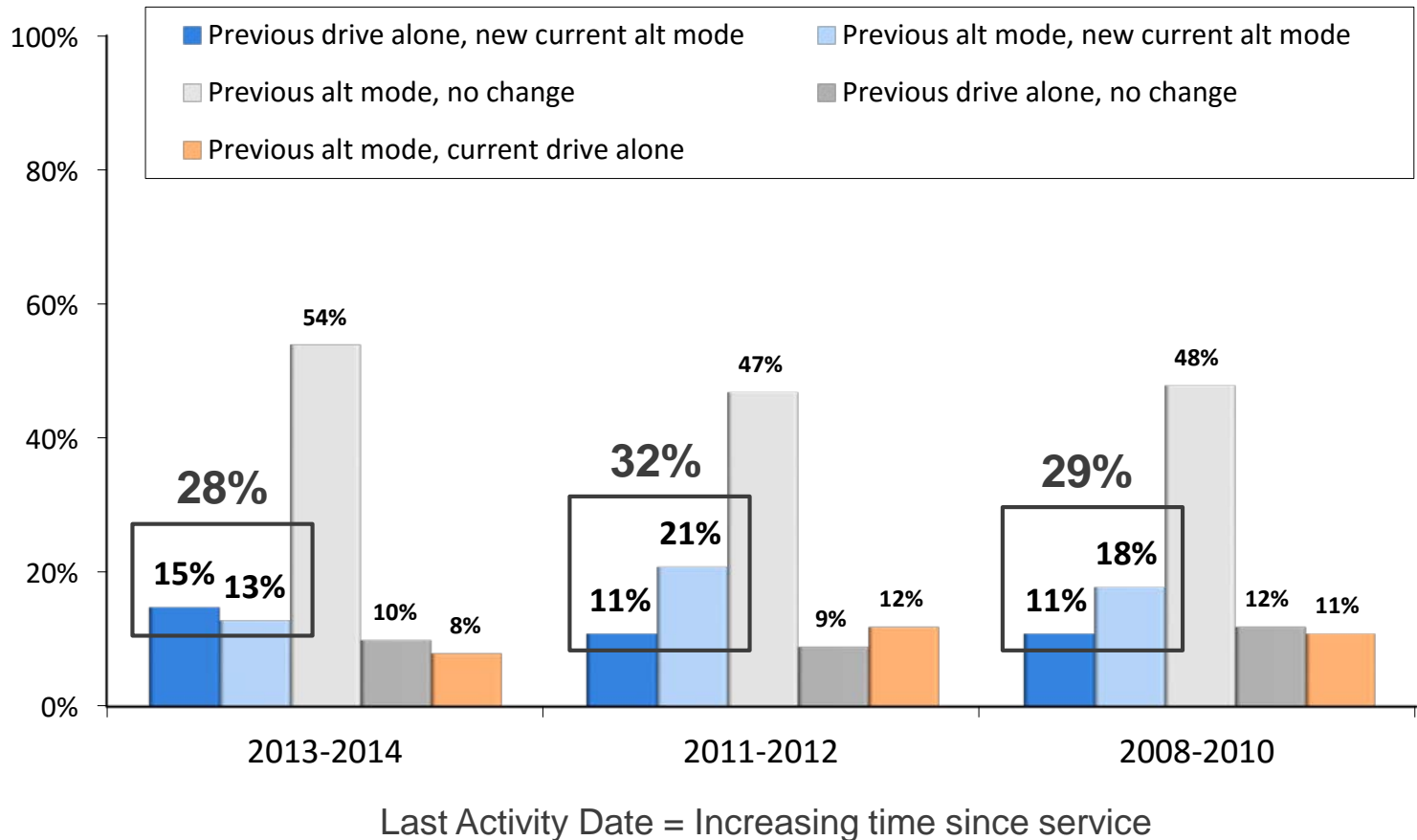
- Previous drive alone (change to new alt mode)
- Previous DIFFERENT alt mode (change to new alt mode)
- Previous SAME alt mode, NO change

Current drive alone

- Previous drive alone (No change)
- Previous alt mode (change to driving alone)

Retention Rates Were Not Substantially Different by Last Activity Year:

2013-2014 (28%), 2011-2012 (32%), 2008-2010 (29%)



Q15 Thinking about a TYPICAL week, Monday through Friday, how do you get to work?

Q24/Q25/Q30 Before you [registered for GRH, first got information from Commuter Connections] how many weekdays did you use each of the listed types of transportation to get to work?

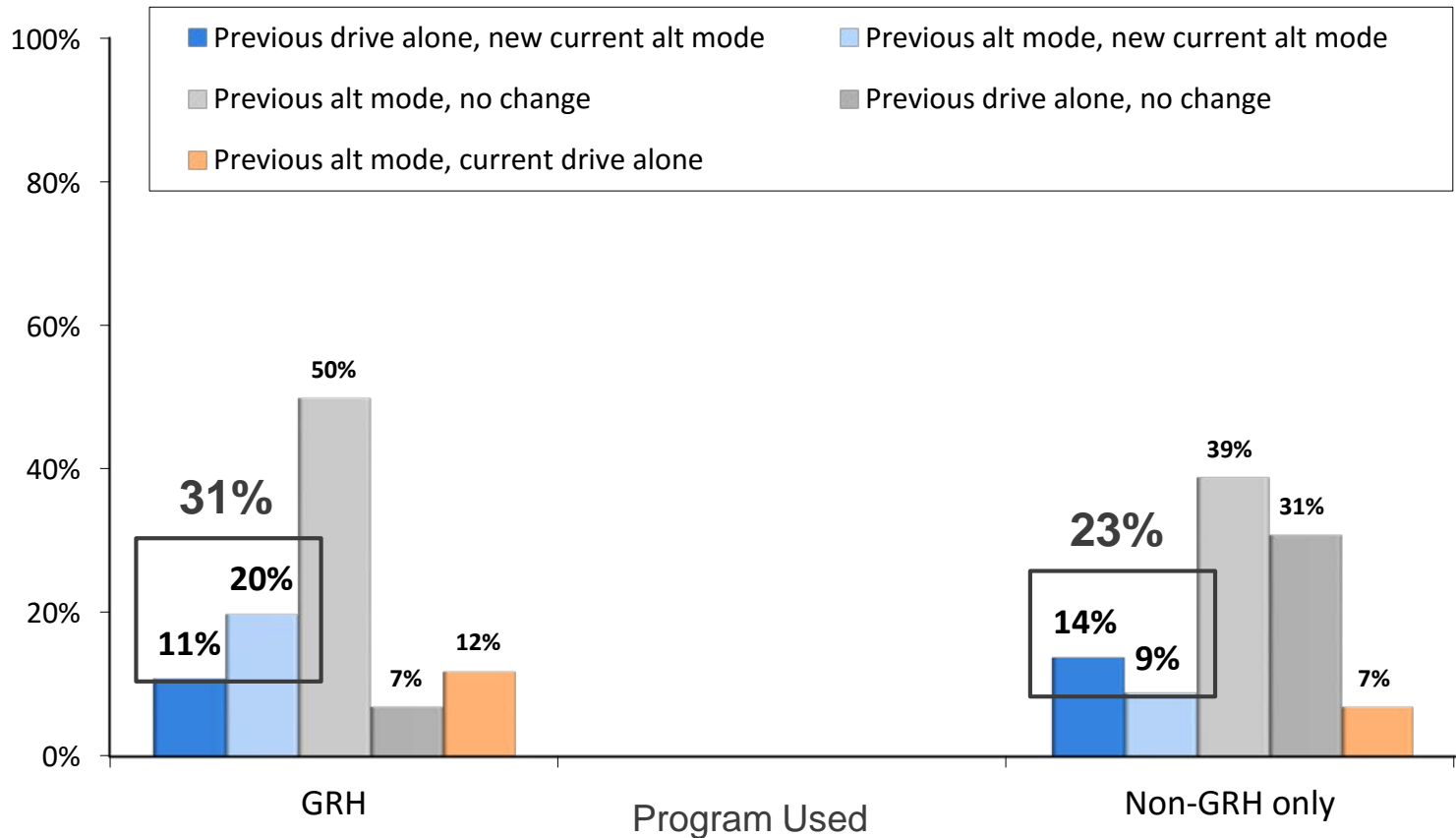
Last Activity Year

2013-2014
n = 221

2011-2012
n = 408

2008-2010
n = 336

GRH Users had Higher Retention Rate (31%) than Did Non-GRH Only Users (23%)



CC Program Used

GRH Users
n = 794

Non-GRH Only
n = 169

Q15 Thinking about a TYPICAL week, Monday through Friday, how do you get to work?

Q24/Q25/Q30 Before you [registered for GRH, first got information from Commuter Connections] how many weekdays did you use each of the listed types of transportation to get to work?

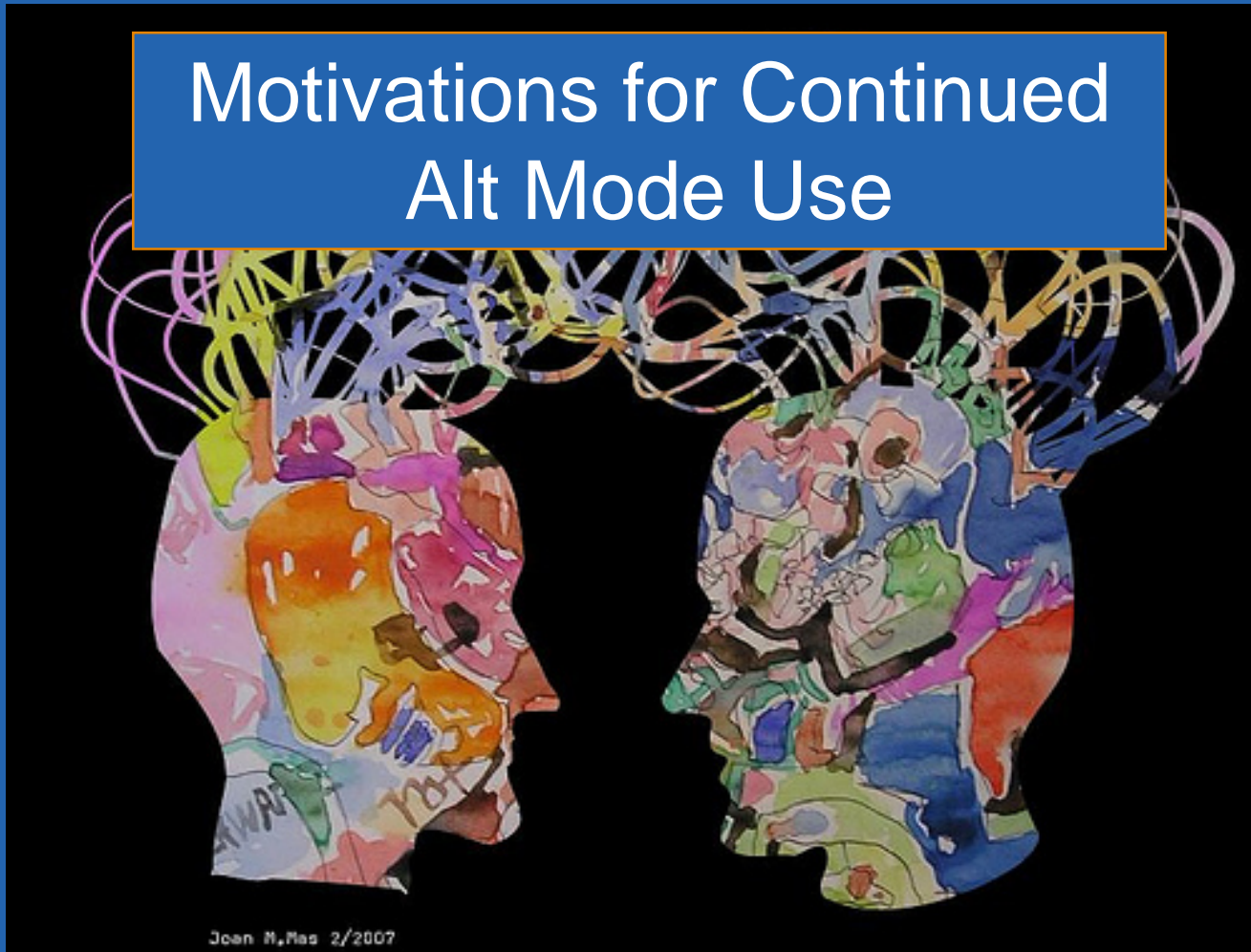
Notes on Retention Rates for the 2017 TERM Analysis

Retention rates calculated from survey data likely overestimate the actual rates

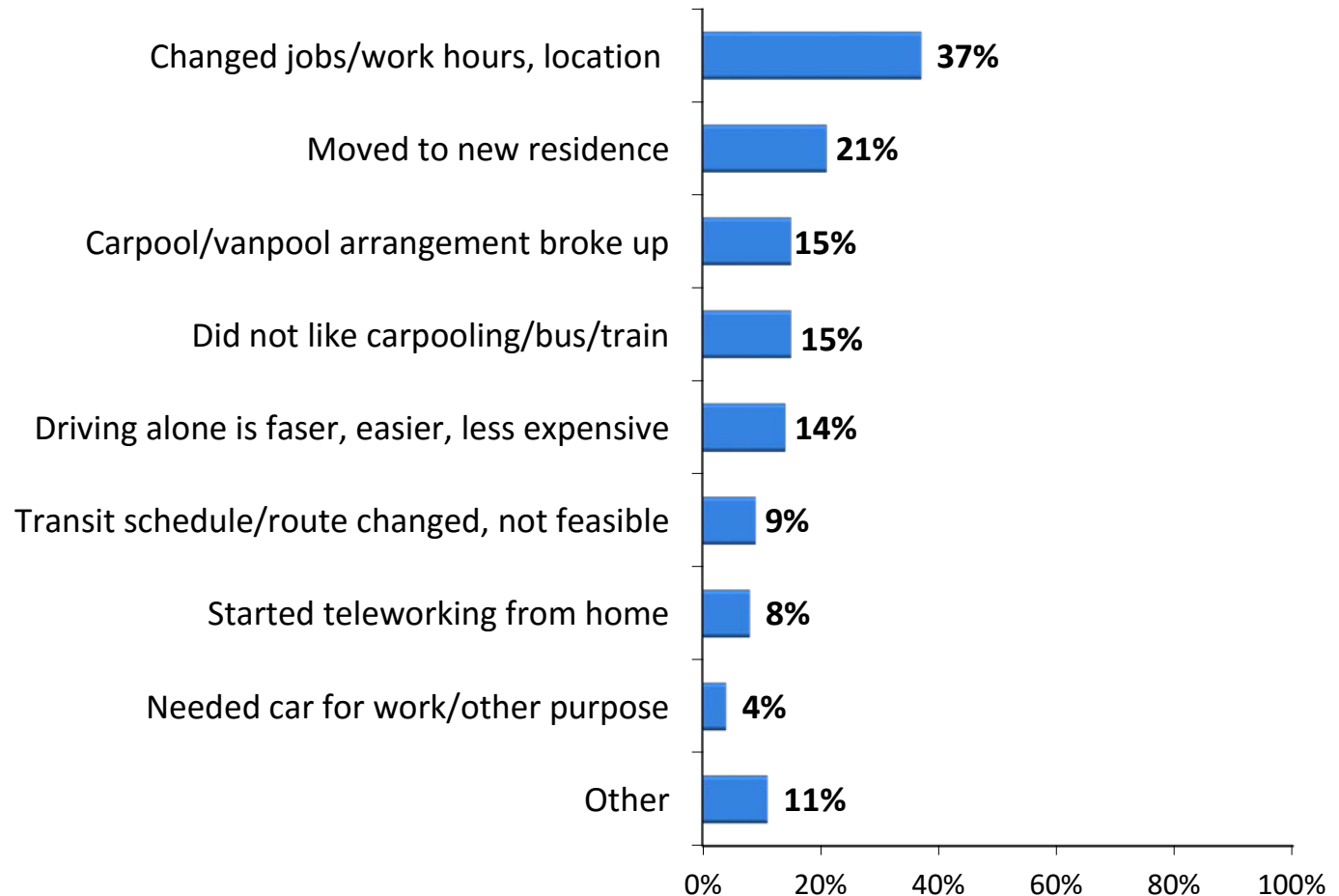
- Inability to reach many past users (retired or died, changed jobs, invalid contact info, perhaps moved out of area?)
- Non-response for commuters with valid contact info - perhaps because they were no longer using alt modes so thought the survey did not apply to them?

Retention rate factors applied in the 2017 TERM analysis will need to take into account that continued alternative mode use among NON-surveyed commuters likely would be lower - one possible adjustment could be to apply the GRH and Non-GRH retention rates to discounted past participant population bases

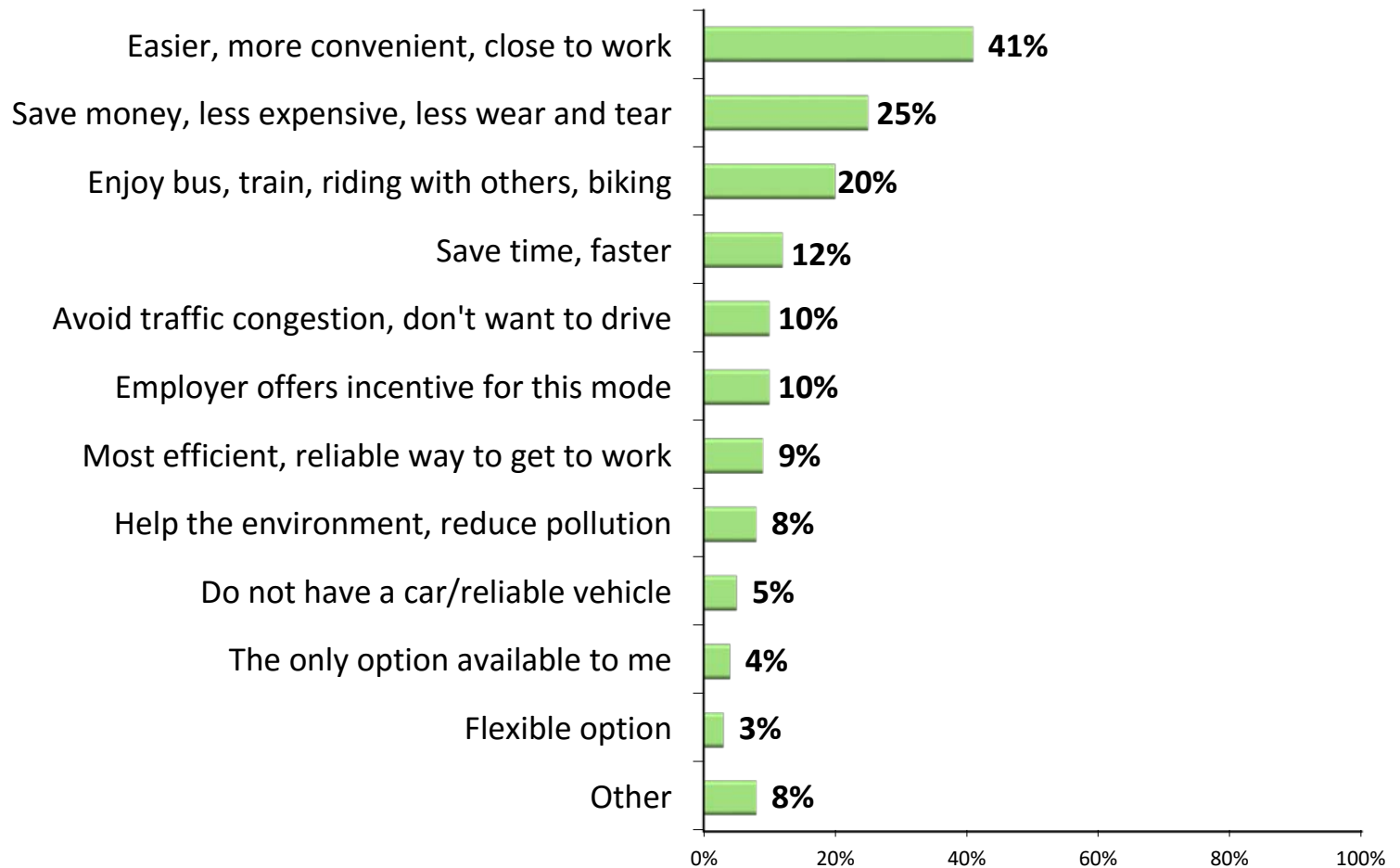
Motivations for Continued Alt Mode Use



Commuters Who Shifted from Alternative Modes to Driving Alone Did So Primarily Because they Changed Jobs/Work Hours or Moved to a New Home

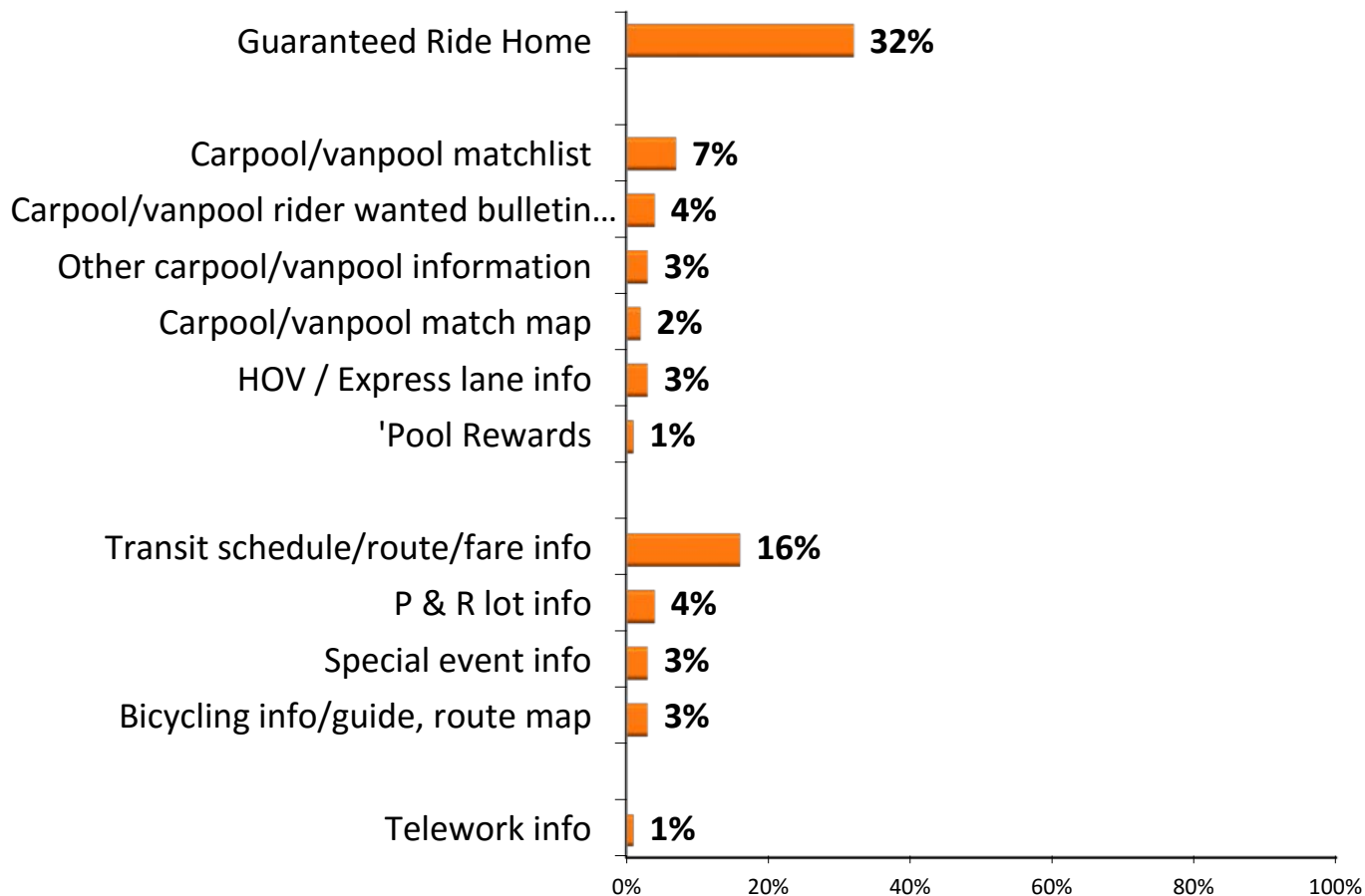


Commuters Who Continued Using Alternative Modes Primarily Gave Personal Benefit Reasons or Because it Was the “Obvious Choice”



52% of Commuters Who Were Using Alternative Modes Said a Commuter Connections Service Influenced or Assisted their Continued Use of Alt Modes

GRH and transit info were most common



Q51 You mentioned earlier that you accessed, requested, and/or received the commute information and assistance services shown below from Commuter Connections or from the Commuter Connections website. Did any of these services influence you or assist you to use carpool, vanpool, bus or train, or walk or bicycle for your trip to work?



Questions?

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