

Commuter Connections 2013 Guaranteed Ride Home Survey Highlights



Commuter Connections
Subcommittee
September 17, 2013
LDA Consulting
with
CIC Research





Methodology



Survey Methodology

- Surveys of random sample of GRH program users:
 - Washington sample: 2,374
 - Baltimore/St. Mary's County sample: 543
- Fifth triennial survey for Washington; First for Baltimore
- Combination of internet and phone
 - Collect data for GRH TERM
 - Current, during, and pre-GRH travel / travel changes
 - GRH influence on travel choices
 - Use of and satisfaction with GRH
 - Use of other CC services





Demographics and Registration

60% of DC GRH Registrants Live in Virginia, but 61% Work in DC

This home and work location pattern has been consistent since the 2001 GRH survey

Baltimore

Home:

MD – 72%

VA – 14%

PA – 6%

NJ – 3%

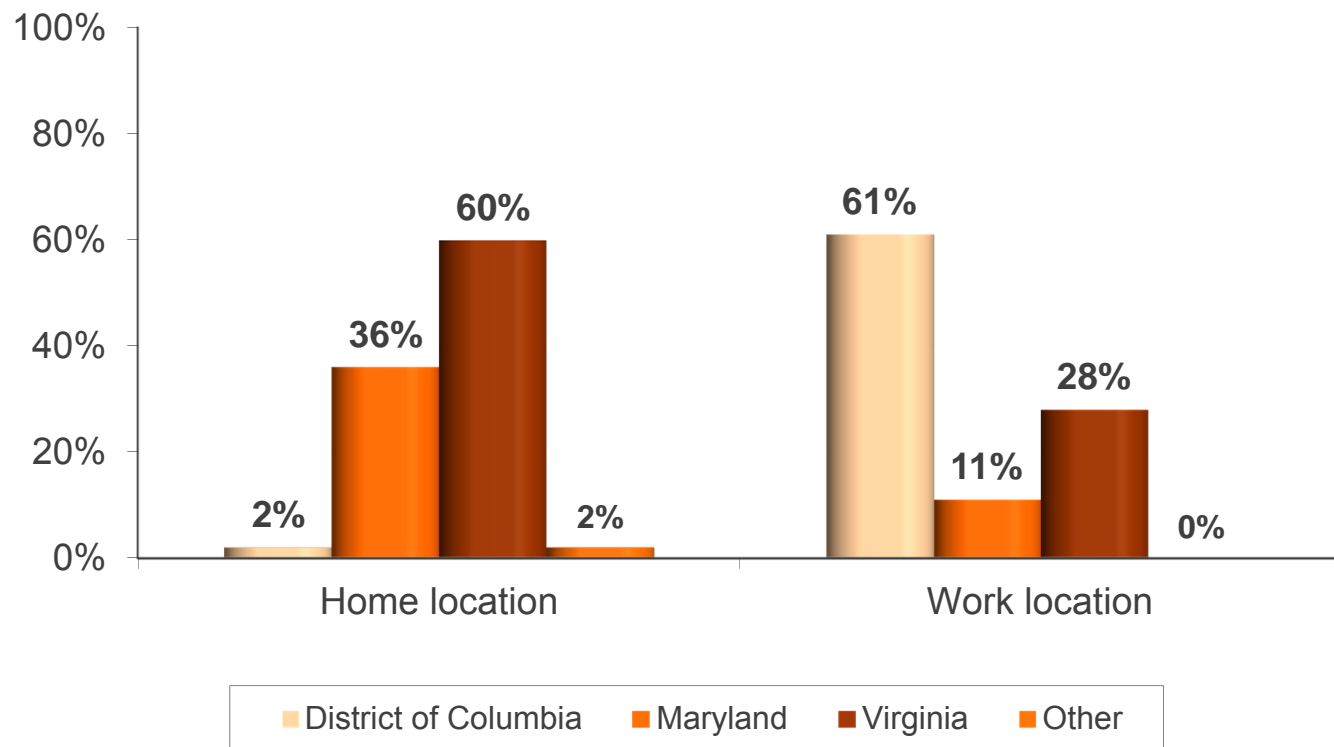
DE – 2%

DC – 2%

Work:

MD – 100%

(n = 543)



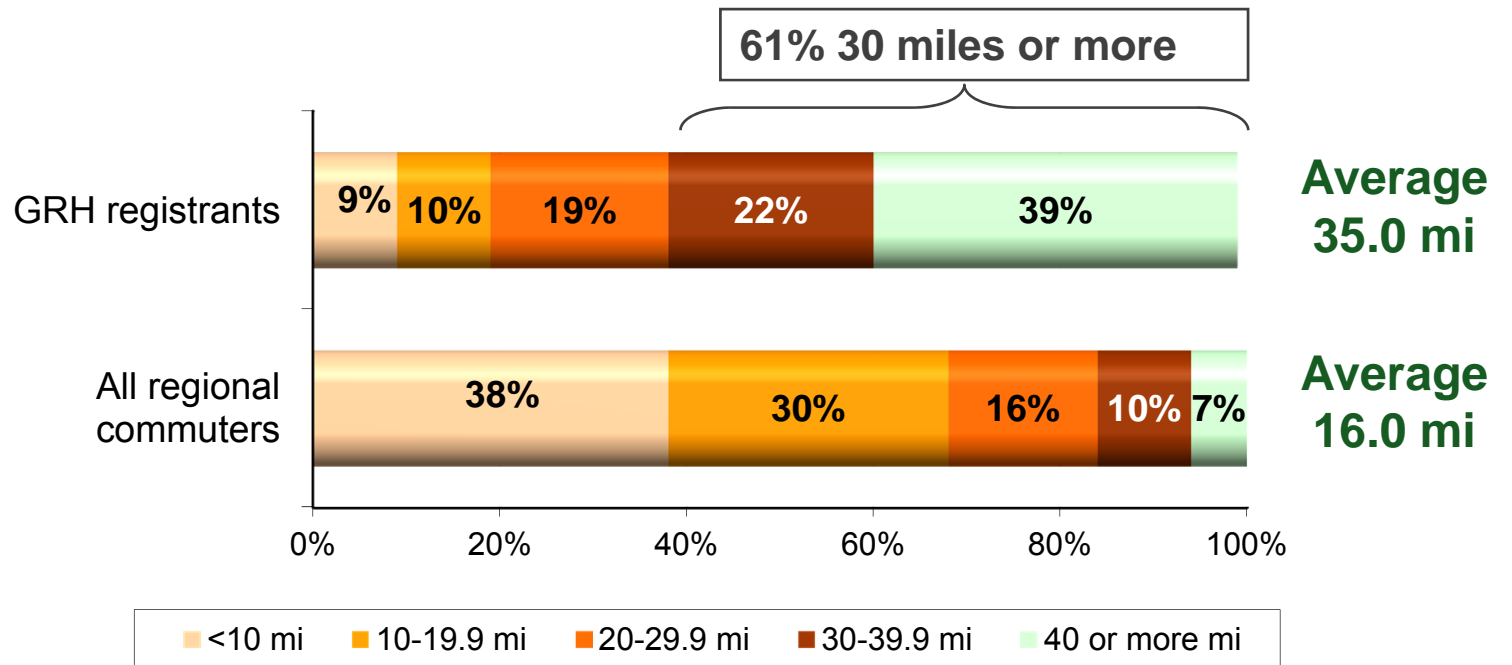
Washington GRH

n = 2,374

From GRH database – home and work city/state

DC GRH Registrants have Very Long Commutes Compared to all Regional Commuters

The average one-way distance for GRH participants is 35.4 miles, compared to 16.0 miles for all regional commuters; six in ten GRH participants travel 30 or more miles



Baltimore

Average Distance

29.9 mi

(n = 534)

Washington GRH
n = 2,308

All regional commuters
n = 5,122

Q15 About how many miles do you usually travel from home to work one way

Most DC Current Participants Correctly Identified their GRH Status, but 50% of Past Registrants Incorrectly Thought they were Still Registered

Baltimore

Very similar pattern

88% of current correctly identified

48% of past incorrectly identified as current

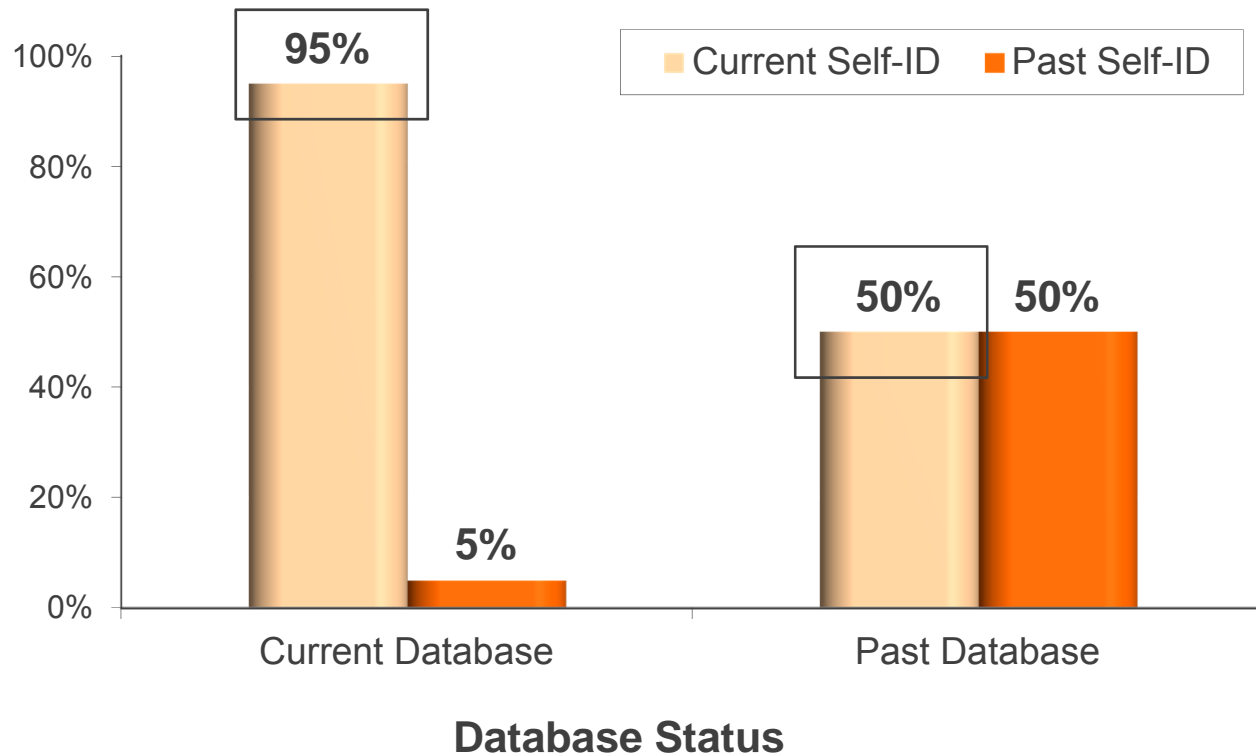
(Current n = 308
Past n = 230)

Washington GRH

Database Status

Current
n = 1,275

Past
n = 1,098



Q2 Are you currently registered for Commuter Connections' GRH program?

Six in Ten DC GRH Participants Registered Before 2010; 40% Registered before 2008

Baltimore

Pre-2010 – 12%

2010 – 20%

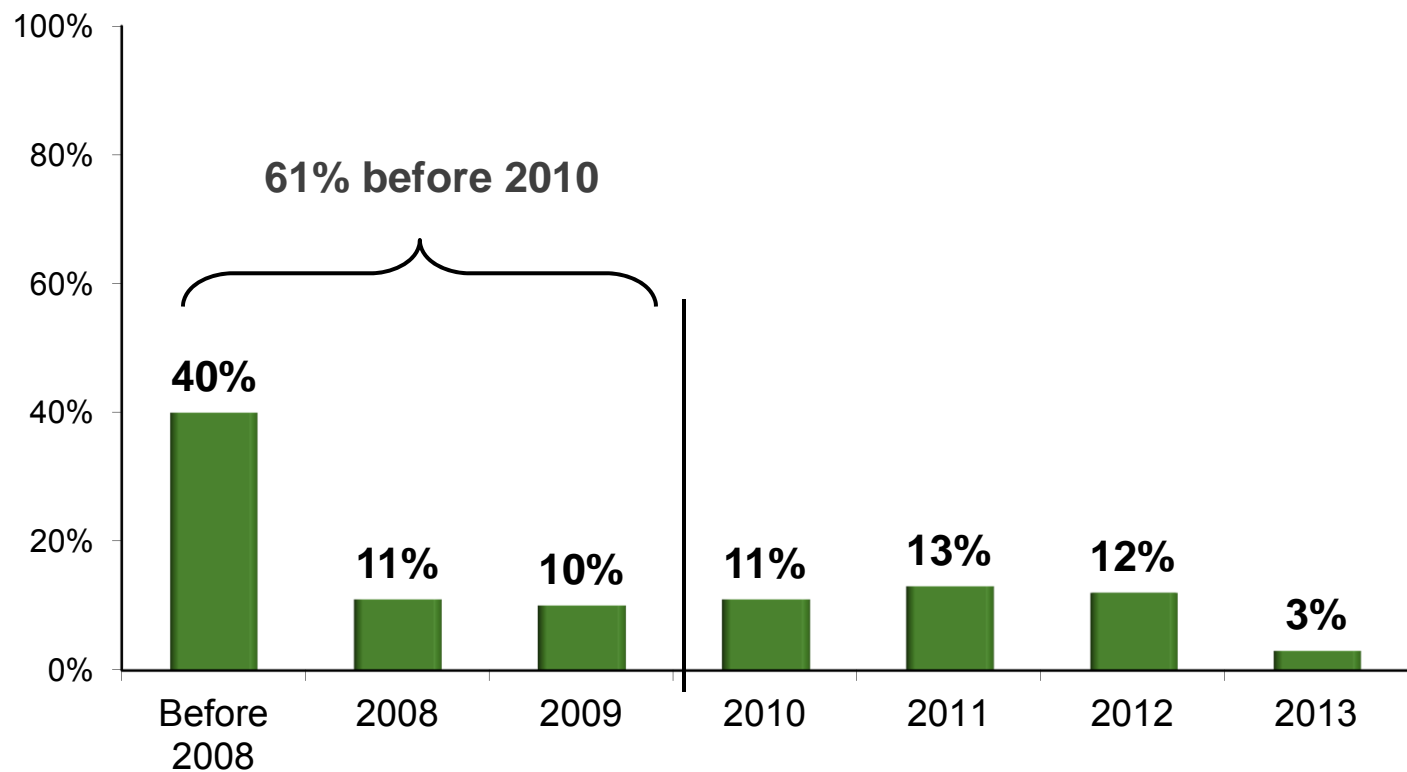
2011 – 40%

2012 – 24%

2013 – 4%

n = 1,945

Note: 3 respondents said they never registered and 426 respondents did not remember when they registered. They are not included in the base for the percentages



Q1 In what year did you first register for Commuter Connections' GRH program?

71% of DC GRH Registrants Participated for Two or More Years

About half participated (past registrants) or have been participating (current registrants) for more than 3 years

Baltimore

2 years or more:

All – 32%

Current – 30%

Past – 39%

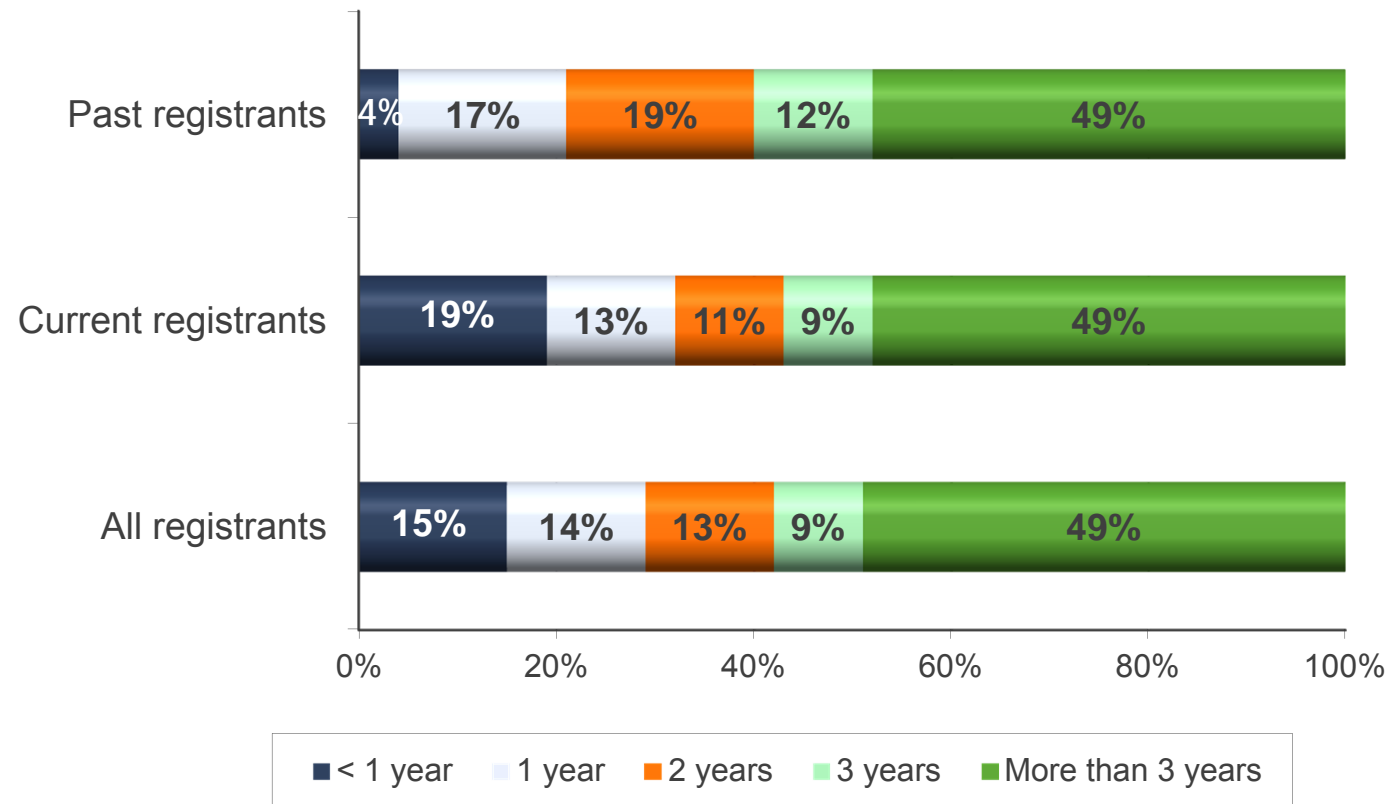
(Current n = 379,
Past n = 106)

Washington GRH

All registrants
n = 1,926

Current registrants
n = 1,462

Past registrants
n = 598



Q4 How long were you registered in the GRH program?

DC Respondents Gave Both Personal and Program Reasons for Not Re-registering

But fewer program issues reported than in 2010

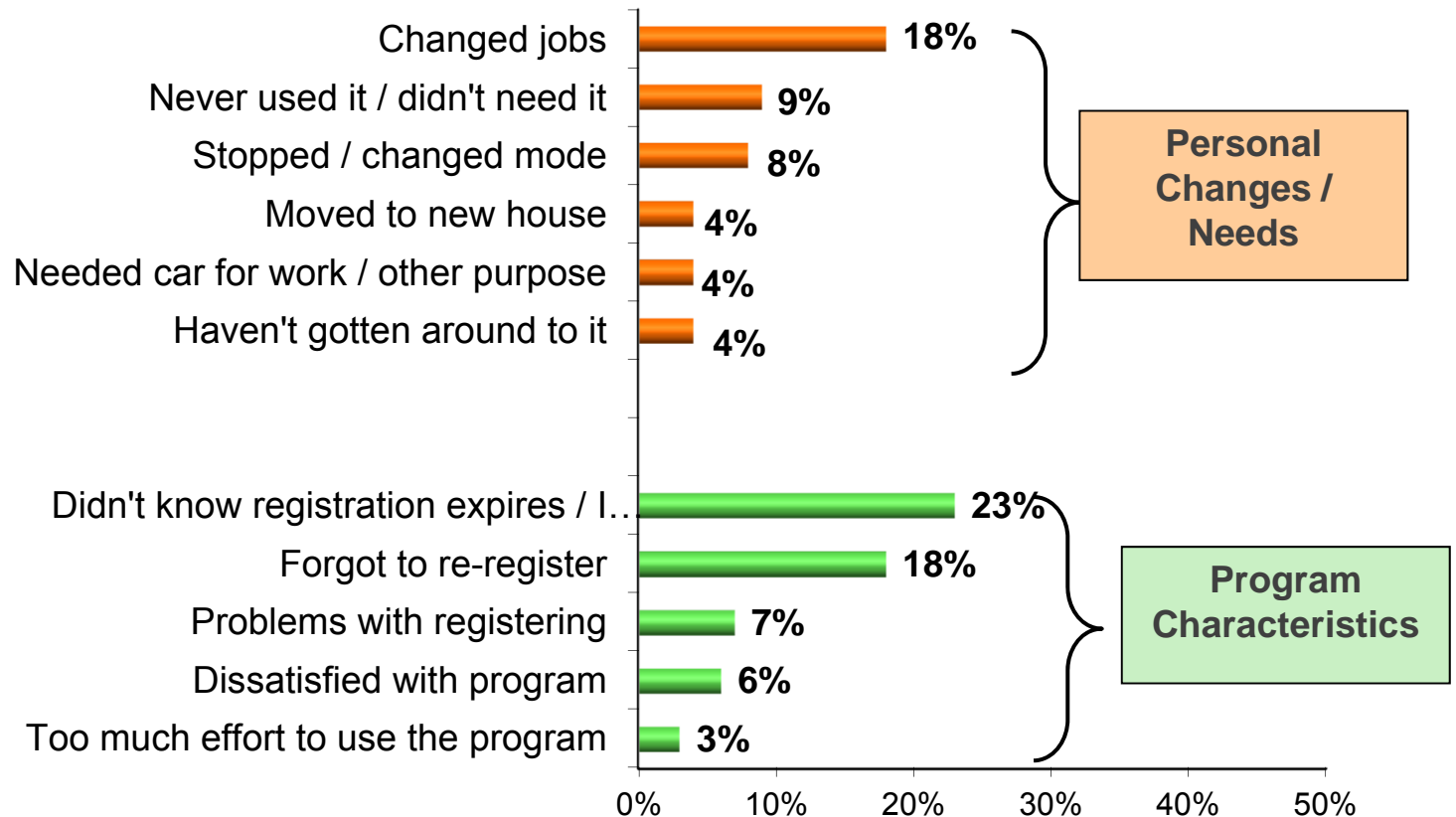
2010 DC Survey

- Forgot – 32%
- Didn't know I had to 21%
- Problem with re-register – 10%
- Dissatisfied – 9%
- Never used it – 9%


Washington GRH

2013 n= 402

2010 n = 175



Q5 Why did you not re-register when your registration expired?



GRH Advertising Recall and Impact

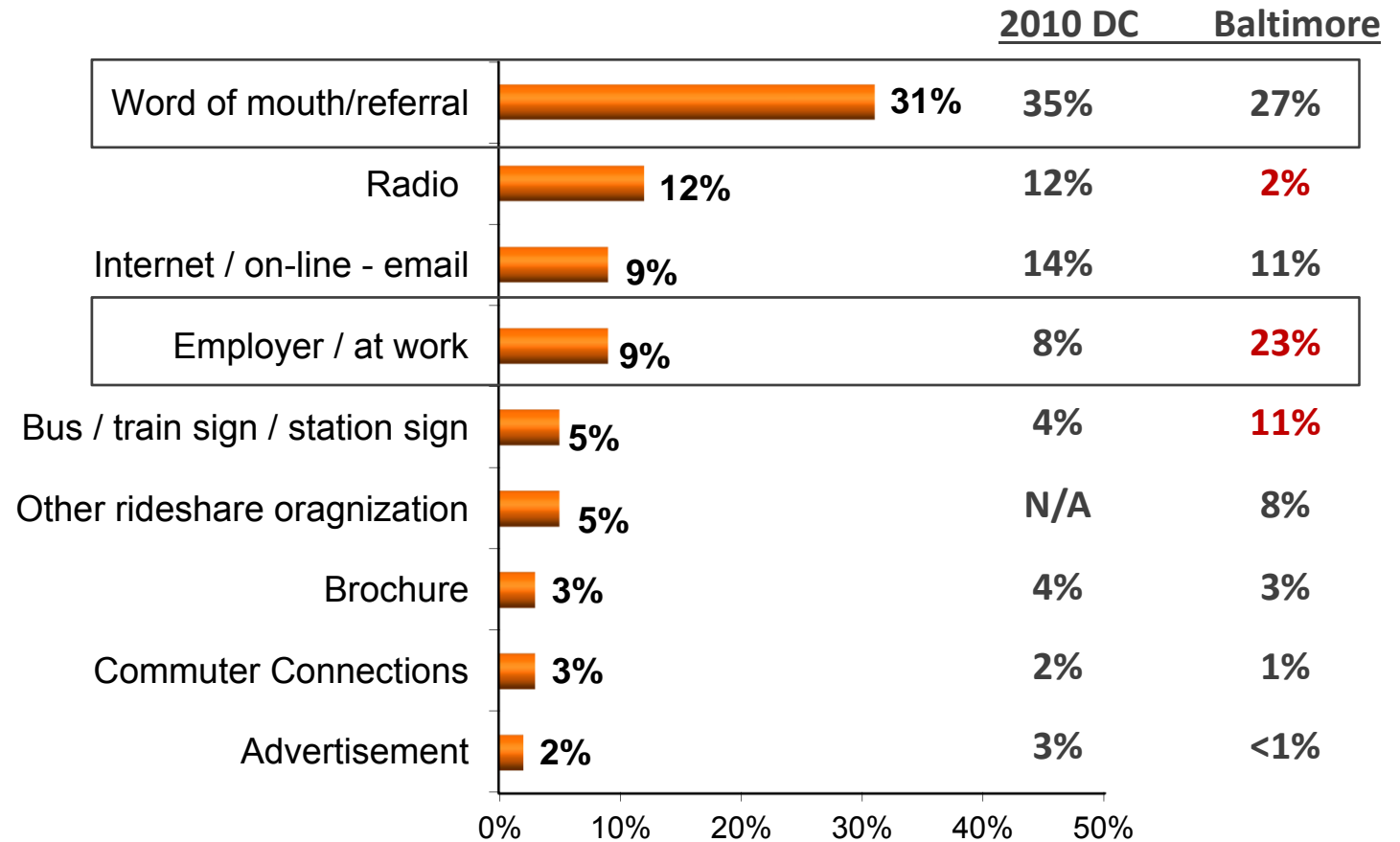


Joan N. Mas 2/2007



Word of Mouth Continues to be the Way Most DC and Baltimore Registrants Learn About GRH

DC 2013 results are similar to DC 2010



Washington GRH

2010 n = 999

2013 n = 2,374

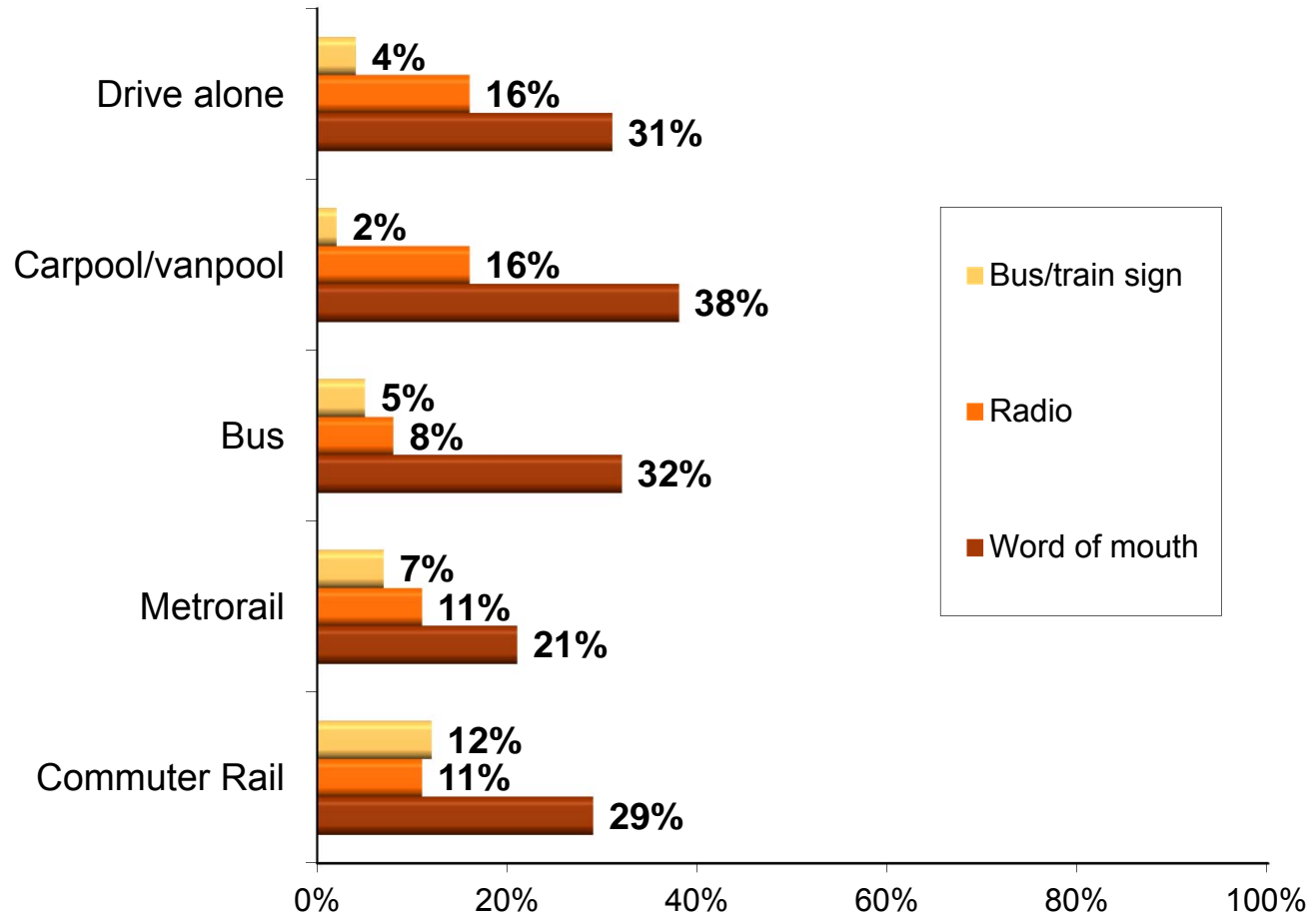
Baltimore GRH

2013 n = 120

Q49 How did you hear about the GRH Program?

Source of GRH Information Varies by Mode

Word of mouth is top source for all DC participants, but drive alone registrants and carpoolers also noted radio. Transit riders named sign on bus/train or in train station



Washington GRH
Pre-GRH Mode

Drive alone
n = 537

Carpool / vanpool
n = 266

Bus
n = 449

Metrorail
n = 312

Commuter rail
n = 403

Q49 How did you hear about the GRH Program?
Q29 And before you registered for GRH, how did you get to work?

58% of All DC Program Participants Heard or Saw GRH Ads

Respondents who registered before 2008 are more likely to have seen or heard GRH ads – 62% recalled ads, compared to 59% of respondents who registered between 2008 and 2009 and 52% who registered between 2010 and 2011; But recent registrants cite ads at a higher rate

Baltimore

Heard Ads

46%

(n = 543)

Washington GRH

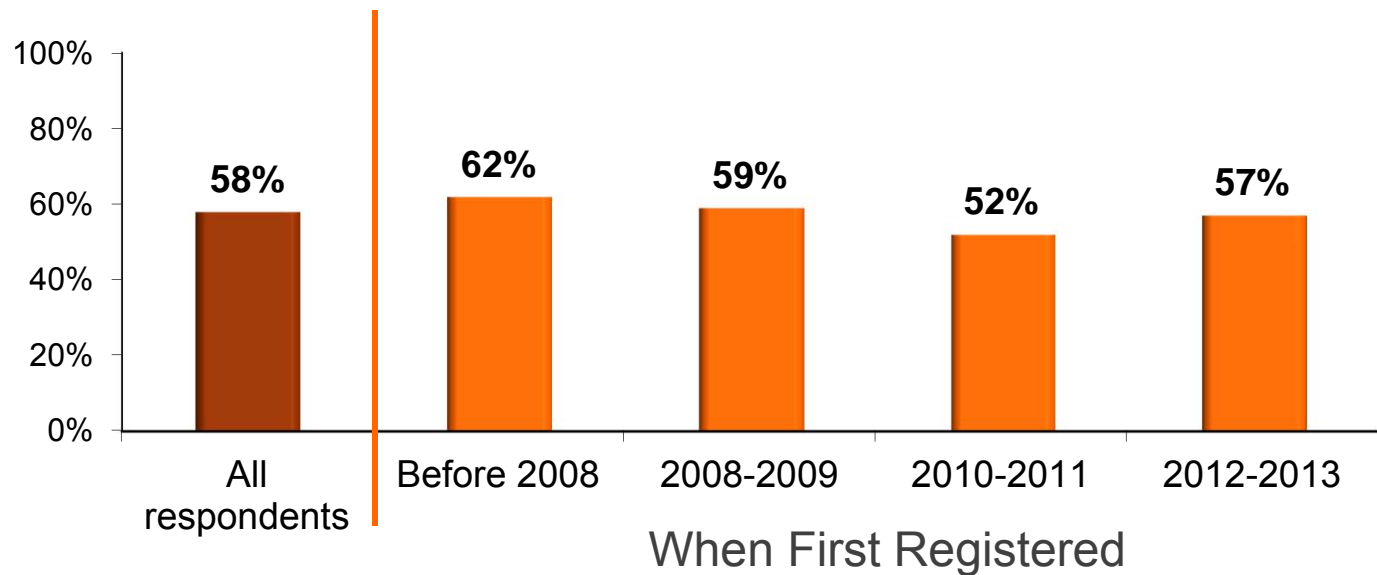
All Respondents
n = 2,374

Before 2008
n = 757

2008-2009
n = 402

2010 – 2011
n = 476

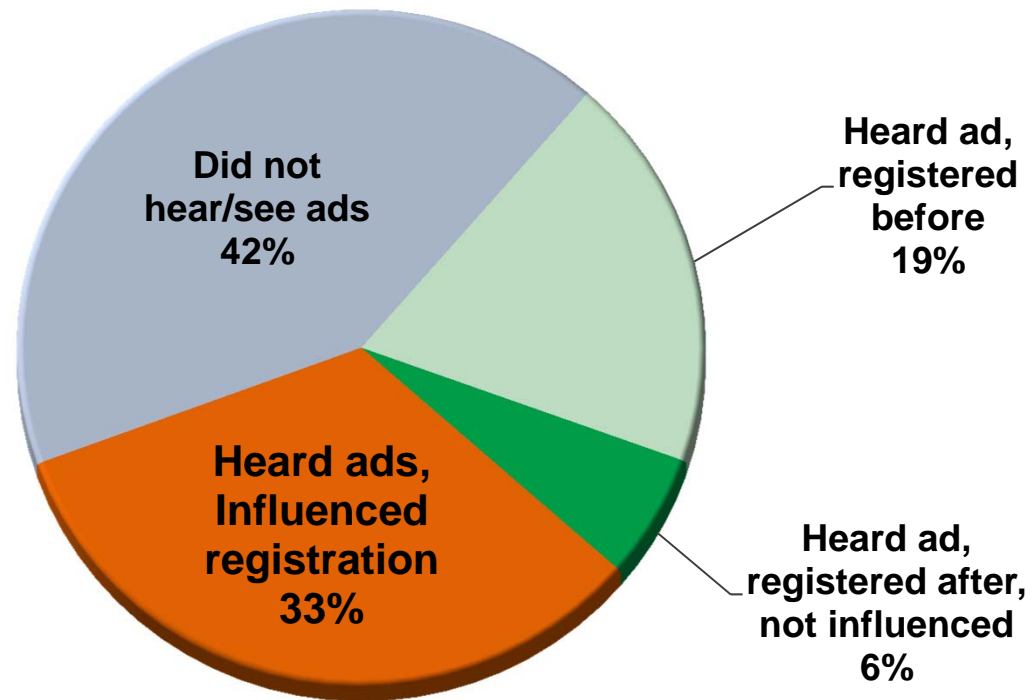
2012-2013
n = 310



Q50 Have you heard, seen, or read any advertising about GRH?

33% of DC Registrants were Influenced by GRH Ads to Register

Other participants did not hear ads (42%), registered before they heard the ad (19%), or were not influenced by the ad (6%)



Baltimore

Heard Ads / Influenced registration

24%

(n = 543)

Washington GRH

n = 2,374

Q52 Had you registered for GRH before you saw or heard this advertising?

Q53 Did the advertising encourage you to seek information about GRH or to register for GRH?



GRH Commute Patterns and Changes



GRH Research Questions:

Did GRH:

- Encourage shifts from SOV to alt modes?
- Encourage more frequent use of alt modes?
- Extend duration of alt mode use?

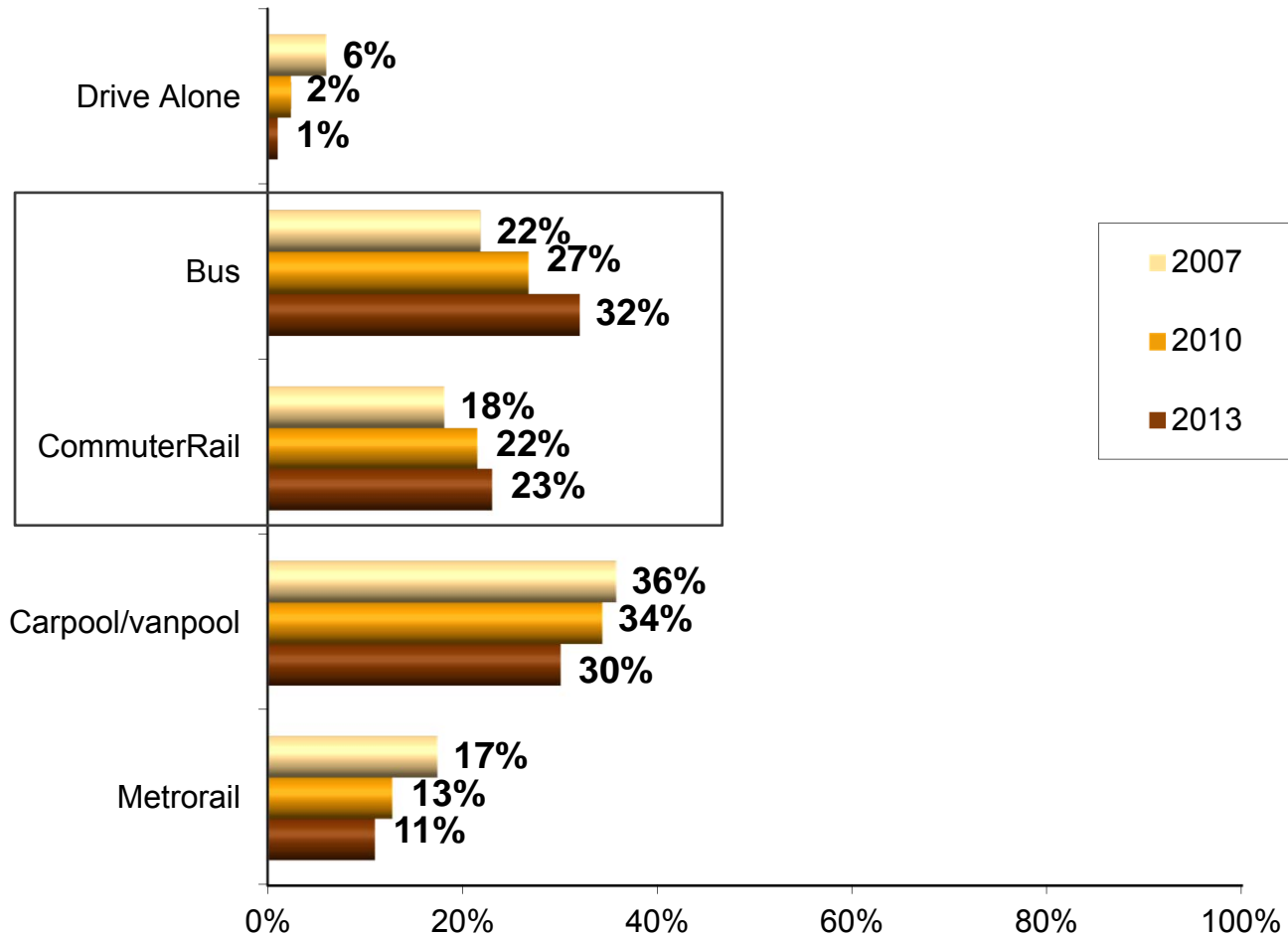
How important was GRH relative to other factors in influencing shifts?



Washington Travel Changes

Bus and Commuter Rail Account for a Larger Share of Current DC Mode Use vs 2010 and 2007

Carpool / Vanpool and Metrorail have Lower Use than in 2010 / 2007



Washington GRH

2013
n = 1,773

2010
n = 788

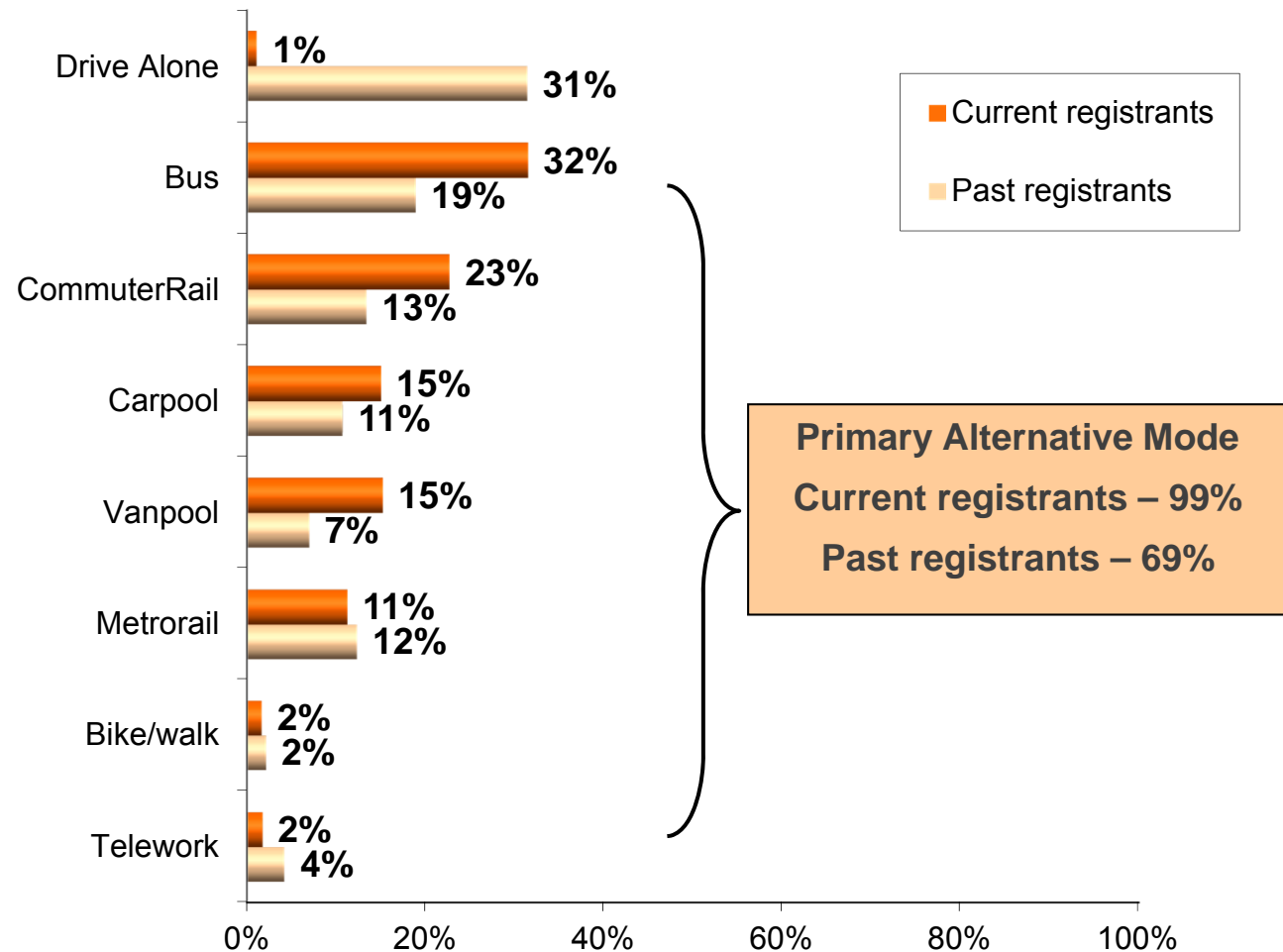
2007
n = 935

Chart excludes telework
primary mode

Q14 Thinking about a TYPICAL week, how do you get to work, Monday through Friday?

Primary Mode – Current and Past Registrants

99% of current DC registrants use an alternative mode as their primary mode; but 69% of past registrants also still use alt modes



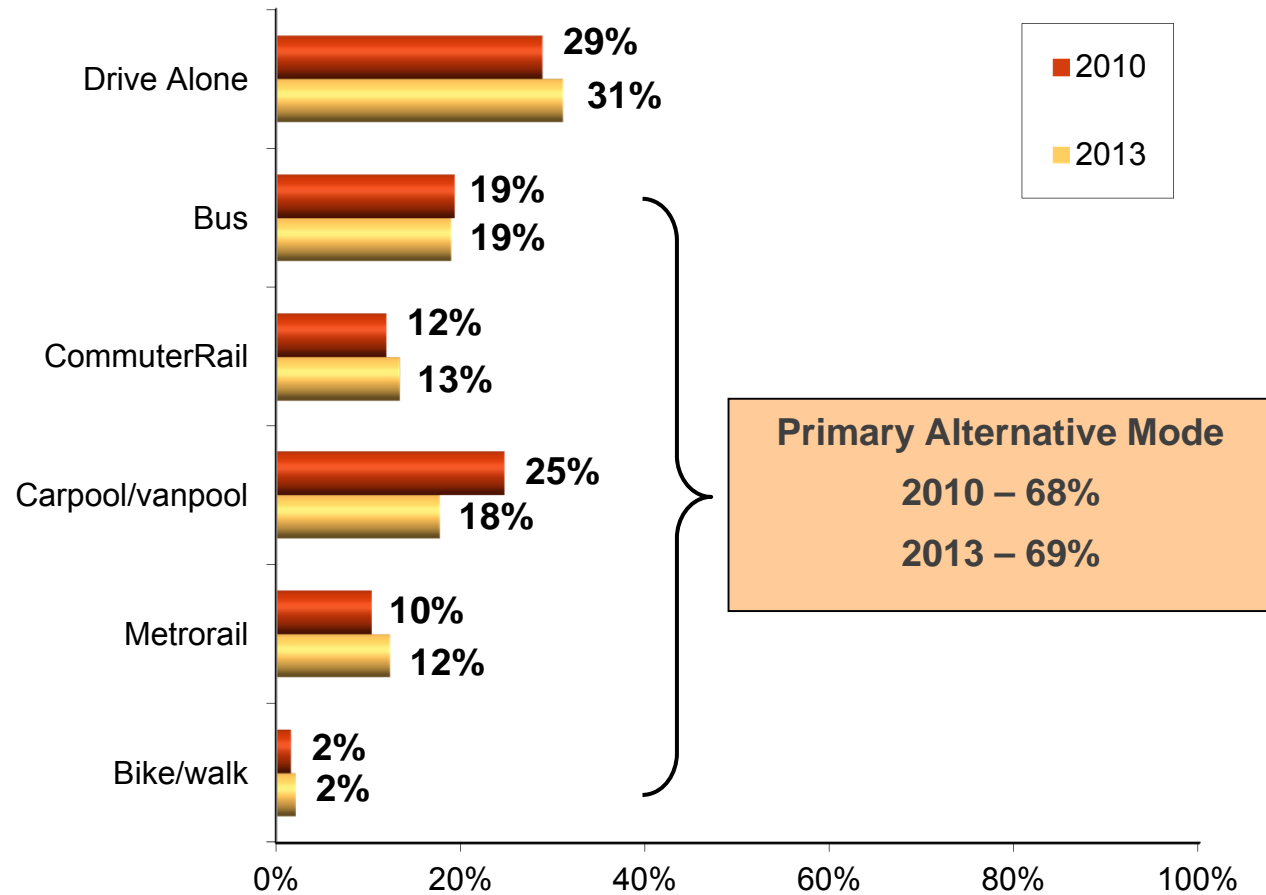
Washington GRH

Current registrants
n = 1,773

Past registrants
n = 598

Q14 Thinking about a TYPICAL week, how do you get to work, Monday through Friday?

The Share of Past Registrants who Continued Using Alternative Modes is Essentially the Same in 2013 (69%) as in 2010 (68%)



Washington GRH

2013
n = 598

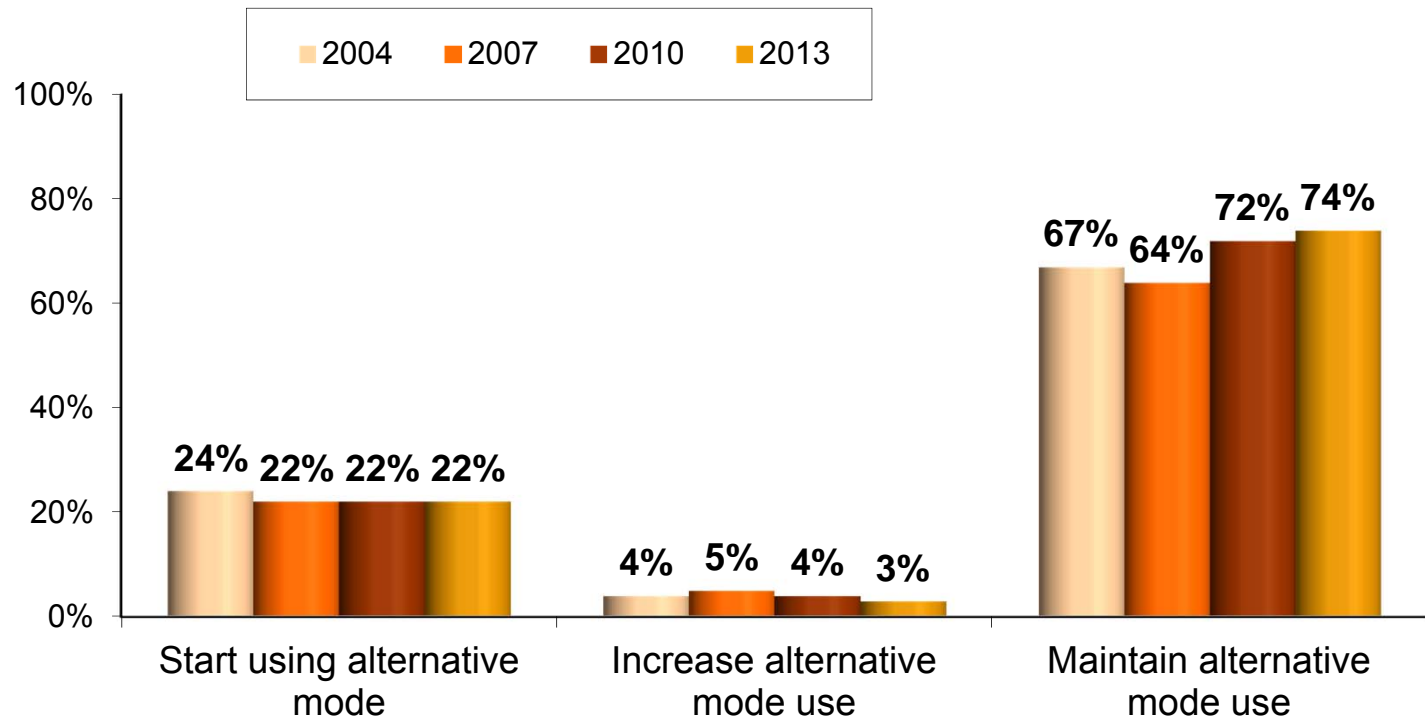
2010
n = 250

Chart excludes
telework primary mode

Q14 Thinking about a TYPICAL week, how do you get to work, Monday through Friday?

In 2013, 24% of DC Registrants Started Alt Modes and 3% Increased Alt Modes After Joining

The proportions of alt mode changes have been consistent since 2004



Washington GRH

2004
n = 981

2007
n = 918

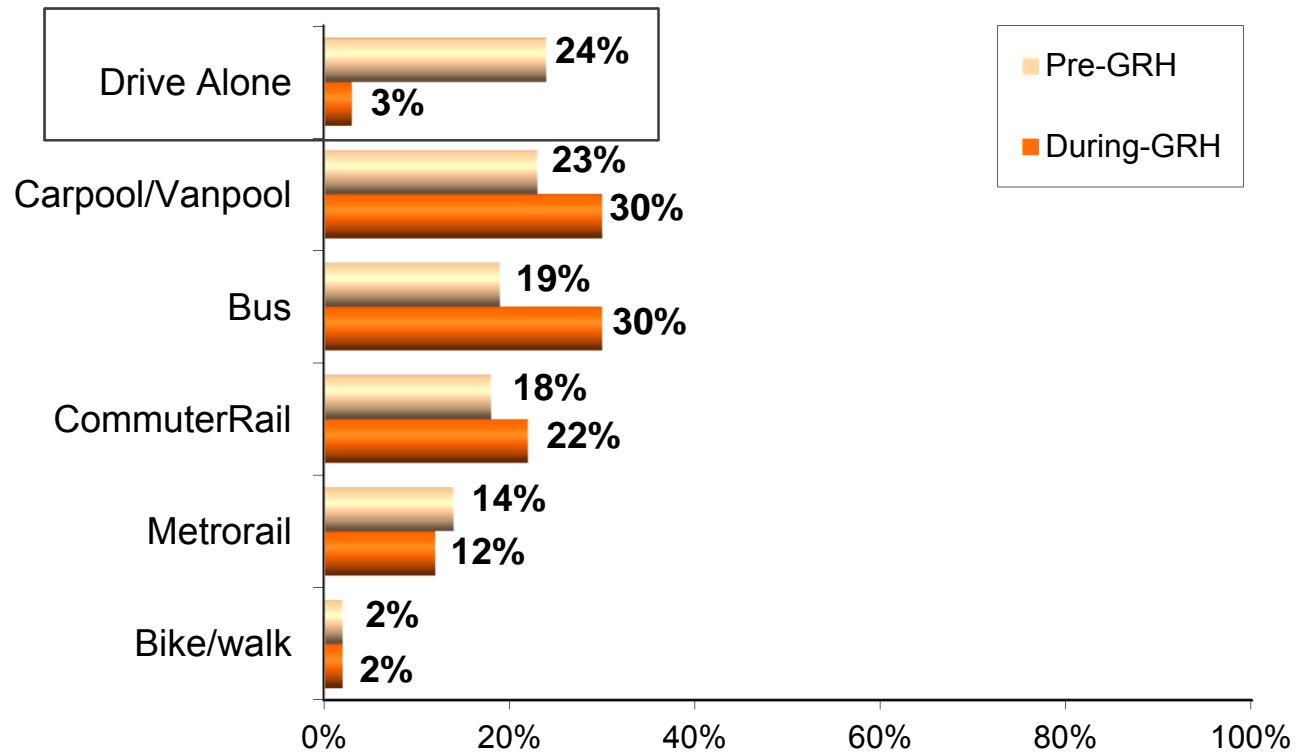
2010
n = 972

2013
n = 2,226

Derived from comparison of Pre-GRH and During-GRH modes

24% of DC Registrants Drove Alone Pre-GRH; 3% Drove Alone During-GRH

Mode share for most alt modes increased from Pre-GRH to During GRH; CP/VP increased from 23% to 30%, bus use rose from 19% to 30%, and commuter rail grew from 18% to 22%



Washington GRH

During GRH
n = 2,374

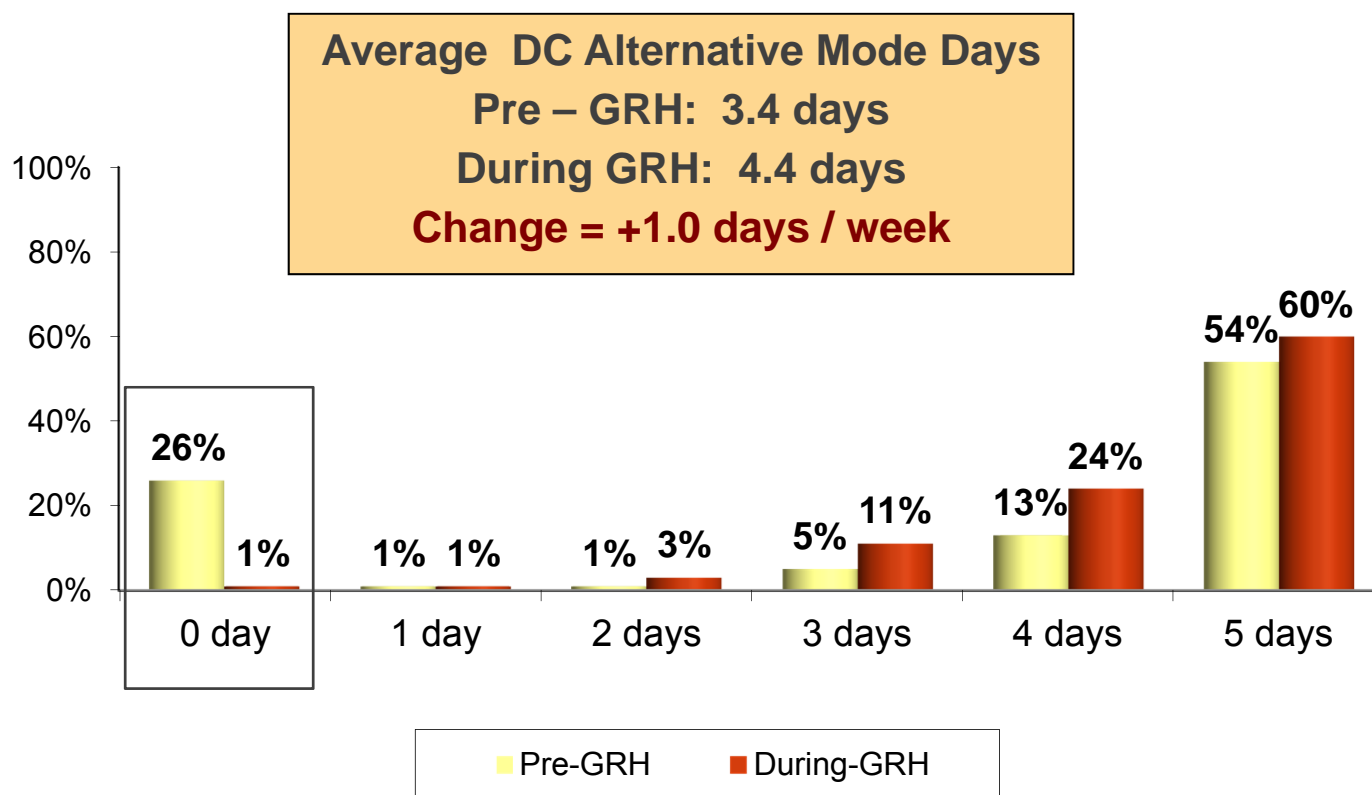
Pre GRH
n = 2,261

Q23 And while you were <registered, eligible> for GRH, how did you get to work?

Q29 And before you registered for GRH, how did you get to work?

During GRH, Average Alt Mode Days Increased from 3.4 Days per Week to 4.4 Days per Week

Increase in DC registrants' alt mode frequency was primarily from shifts from DA to alt modes, rather than from shifts among current alternative mode users



Washington GRH

During GRH
n = 2,374

Pre GRH
n = 2,374

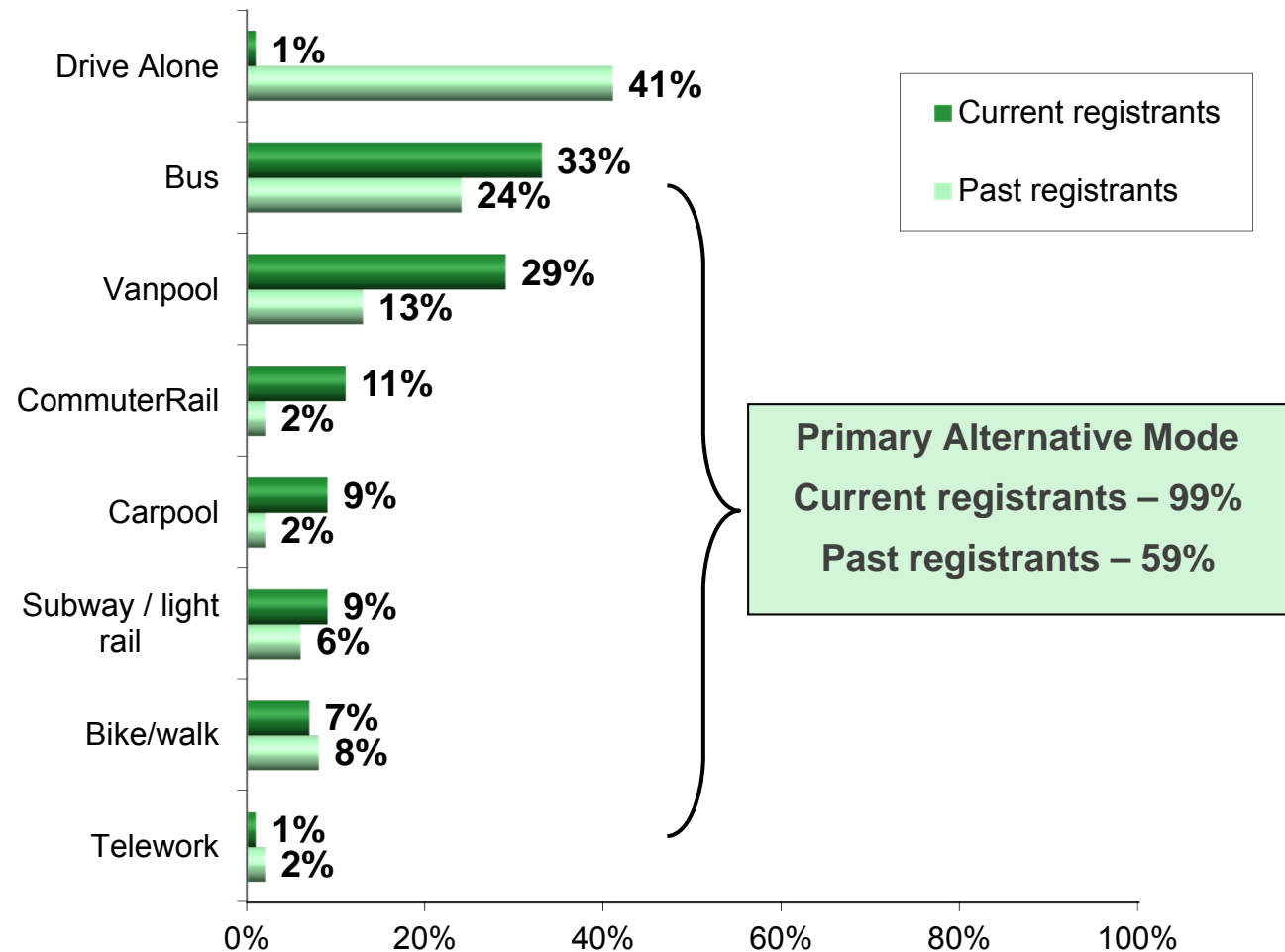
Q23 And while you were <registered, eligible> for GRH, how did you get to work?
Q29 And before you registered for GRH, how did you get to work?



Baltimore / St. Mary's
Travel Changes

Primary Mode – Current and Past Registrants

99% of current Baltimore registrants use an alternative mode as their primary mode; 59% of past registrants still use alt modes



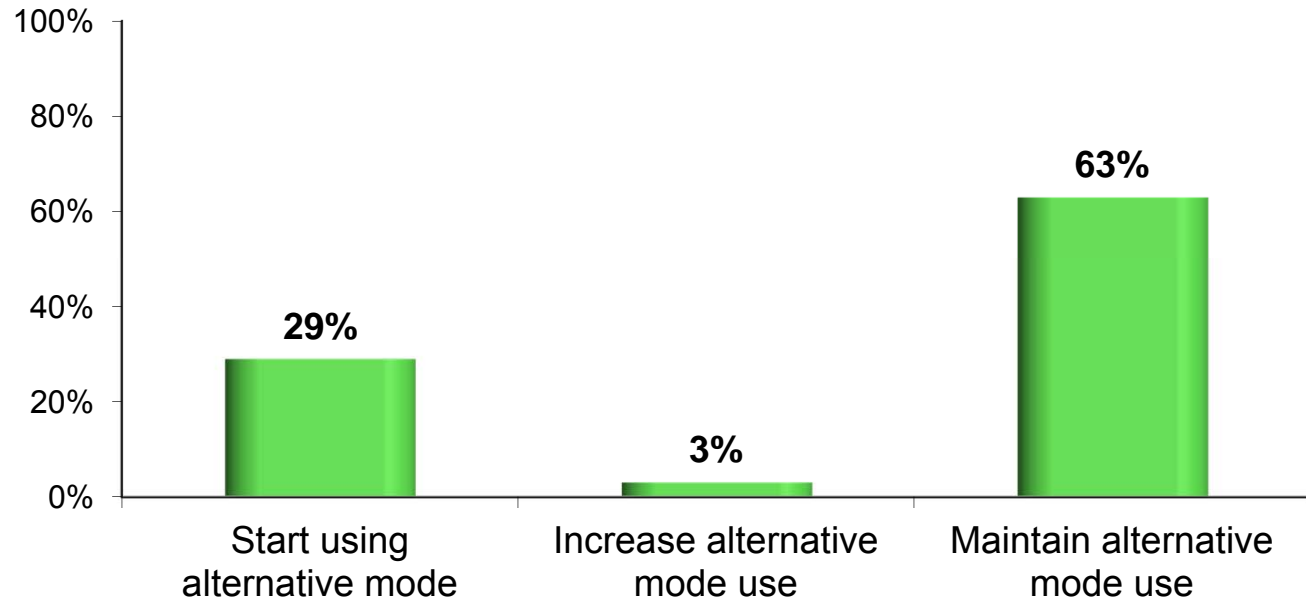
Baltimore GRH

Current registrants
n = 386

Past registrants
n = 157

Q14 Thinking about a TYPICAL week, how do you get to work, Monday through Friday?

In 2013, 29% of Baltimore GRH Registrants Started Alt Modes and 3% Increased Alt Modes After Joining



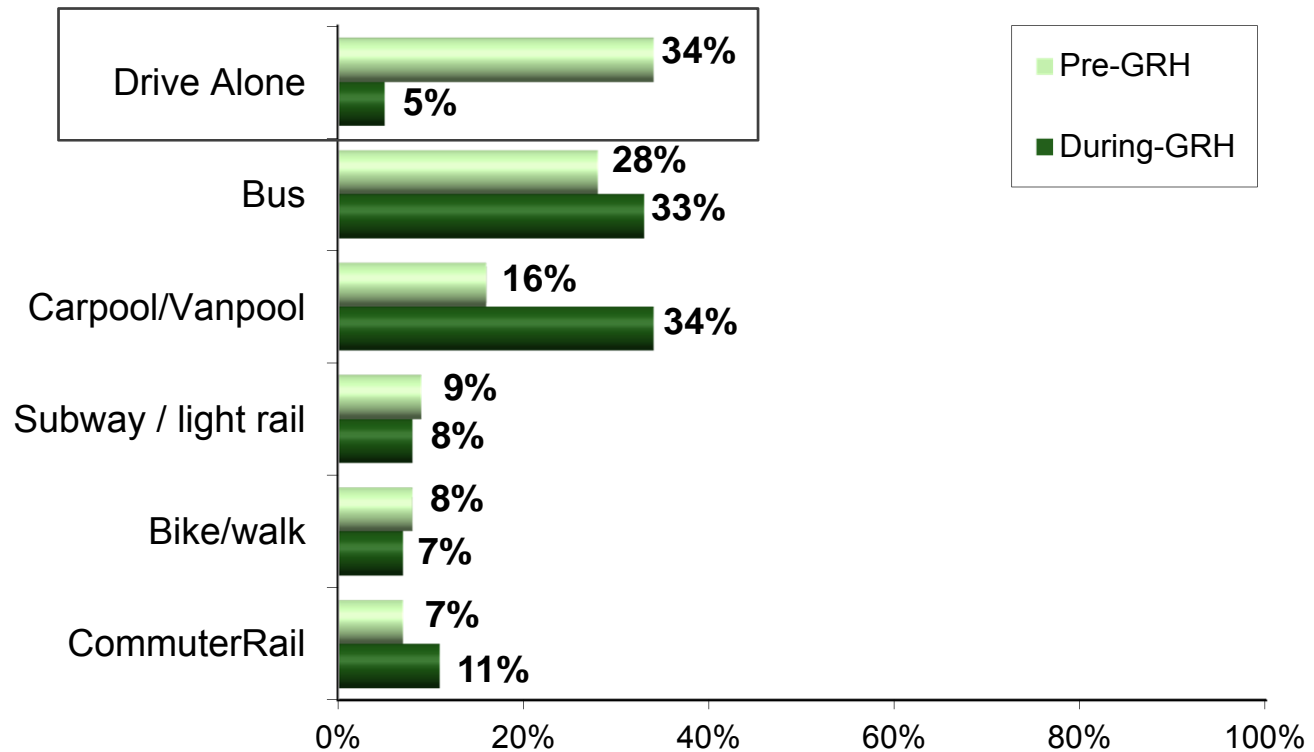
Baltimore GRH

2013
n = 530

Derived from comparison of Pre-GRH and During-GRH modes

34% of Baltimore Registrants Drove Alone Pre-GRH; 5% Drove Alone During-GRH

Mode share for most alt modes increased from Pre-GRH to During GRH; CP/VP increased from 16% to 34%, bus use rose from 28% to 33%, and commuter rail grew from 7% to 11%



Baltimore GRH

During GRH
n = 529

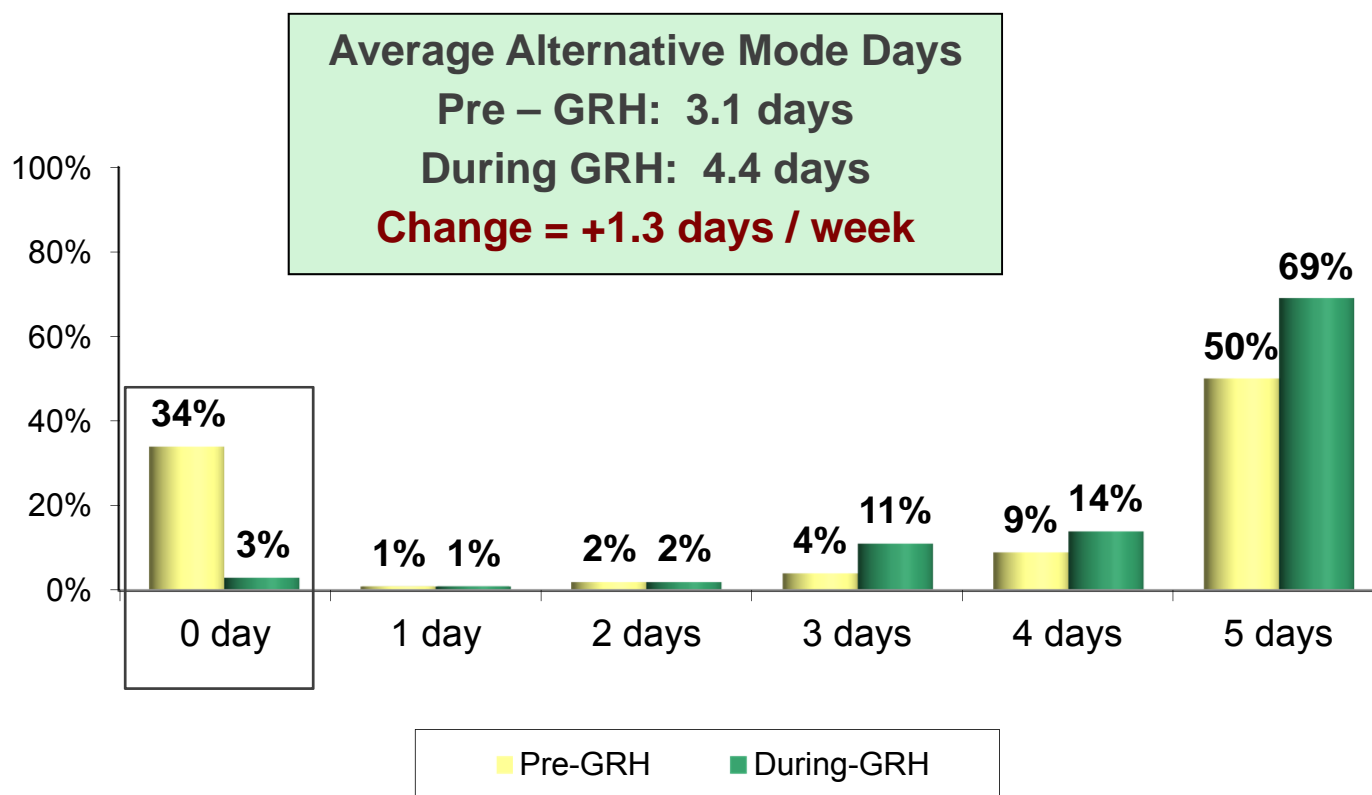
Pre GRH
n = 529

Q23 And while you were <registered, eligible> for GRH, how did you get to work?

Q29 And before you registered for GRH, how did you get to work?

During GRH, Average Alt Mode Days Increased from 3.1 Days per Week to 4.4 Days per Week

Increase in alt mode frequency was primarily from shifts from DA to alt modes rather than among current alternative mode users



Baltimore GRH

During GRH
n = 529

Pre GRH
n = 529

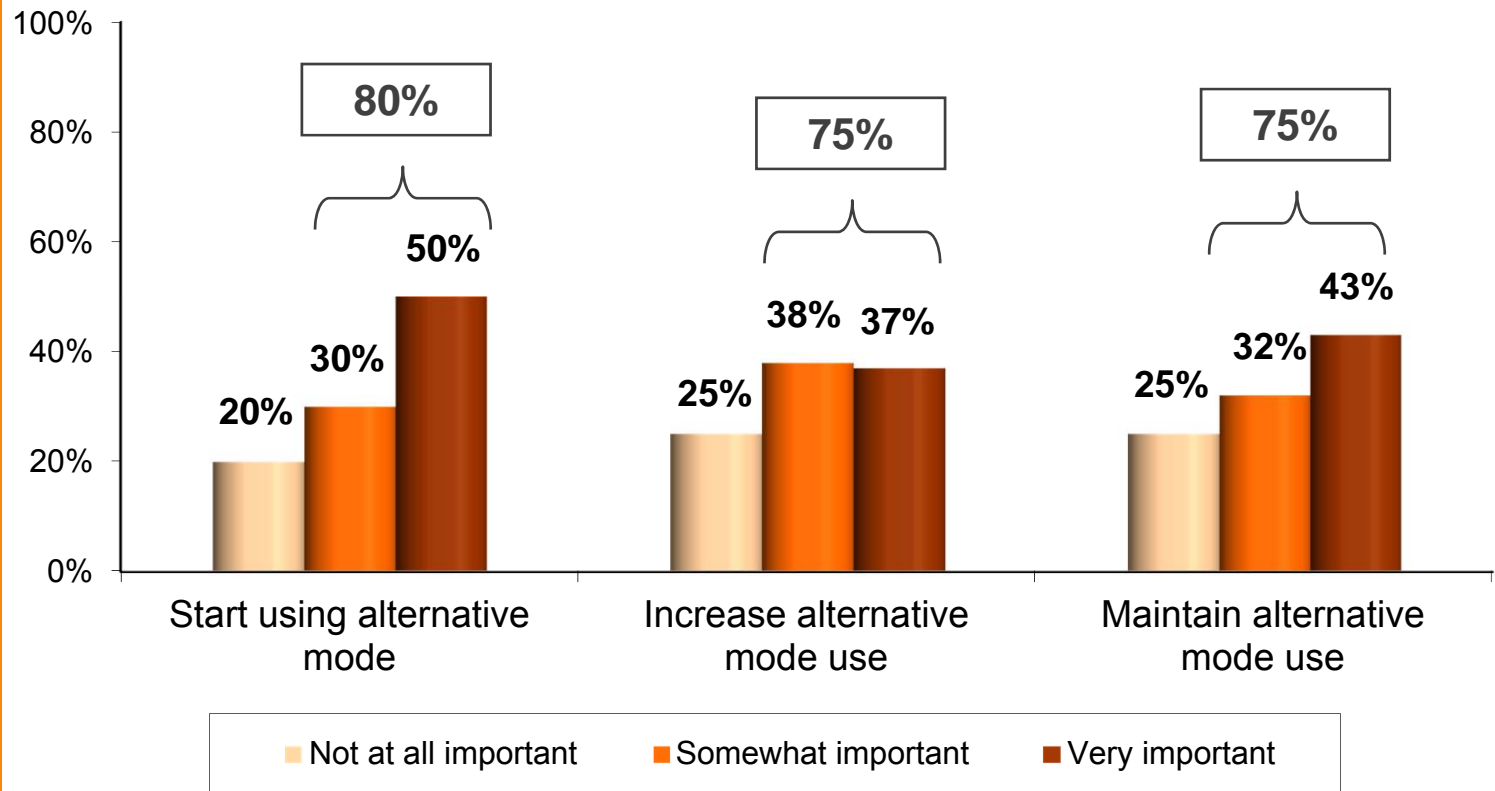
Q23 And while you were <registered, eligible> for GRH, how did you get to work?
Q29 And before you registered for GRH, how did you get to work?



Change Motivations

About 8 in 10 DC Respondents said GRH was “Somewhat” or “Very” Important to Decisions to Start a New Alternative Mode

Similar results were noted for decisions to increase or continue / maintain use of an existing alternative mode



Baltimore

Importance to:

Start

84%

Increase

47%

Maintain

66%

(Start n = 163;
Increase n = 15;
Maintain = 323)

Washington GRH

Start alt mode
n = 479

Increase alt mode
n = 70

Maintain alt mode
n = 1,606

Q30/Q31/Q32 How important was the availability of GRH to your decision to (start, increase, continue) <mode>?

Half of Respondents who Started or Increased Alt Mode Use said they Were Not Likely / Only Somewhat Likely to Switch without GRH

GRH was less valuable to maintaining use of existing alt mode

Baltimore

Not likely/
somewhat likely
to __ without
GRH:

Start

46%

Increase

40%

Maintain

30%

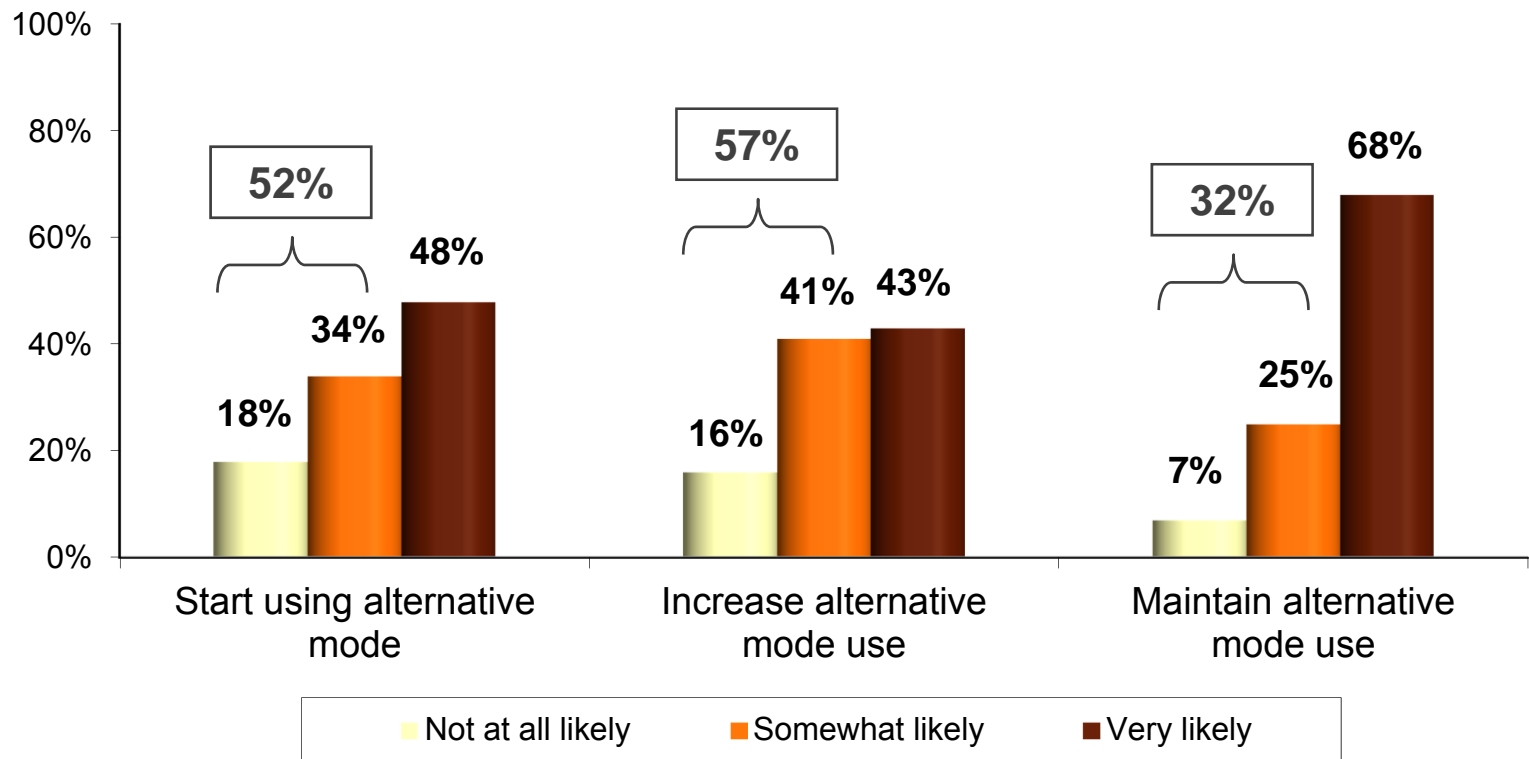
(Start n = 163;
Increase n = 15;
Maintain = 3217

Washington GRH

Start alt mode
n = 464

Increase alt mode
n = 66

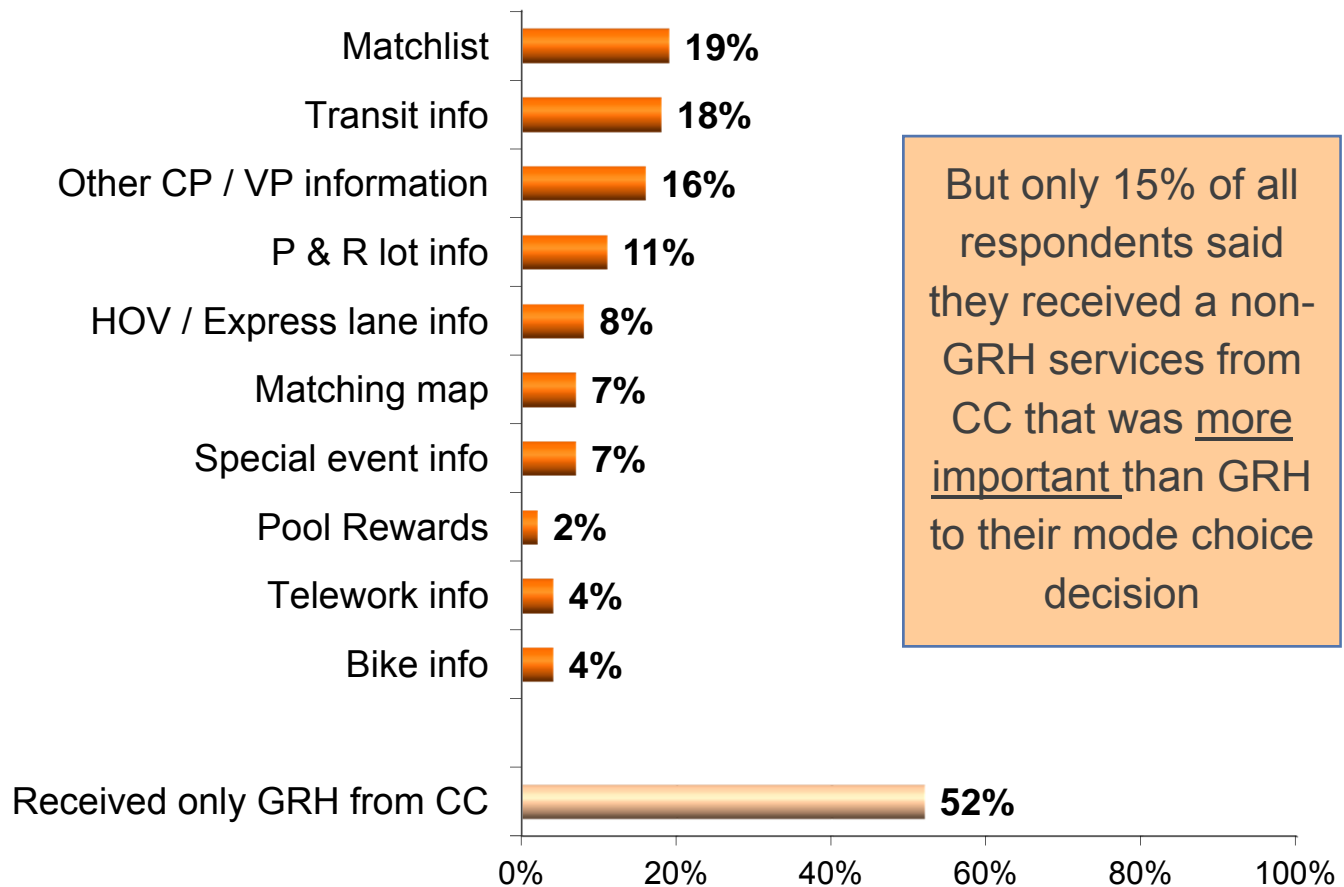
Maintain alt mode
n = 1,572



Q33/Q34/Q32 If GRH had not been available, how likely would you have been to (start, increase, continue) <mode>?

Nearly Half of DC GRH Registrants Received Other Services from Commuter Connections

Most common other services – matchlist, transit info, and other CP/VP information



But only 15% of all respondents said they received a non-GRH services from CC that was more important than GRH to their mode choice decision

Baltimore

65% Received Only GRH

Other CC Services:

Transit **16%**

Matchlist **9%**

Events **9%**

Other CP/VP info **8%**

P&R **7%**

(n = 543)

Washington GRH

n = 2,293

Q44a. Do you recall receiving or accessing any of the following commute information or assistance services from Commuter Connections, in addition to GRH?

50% of Respondents who Made a Change Cited Other Factors that Influenced their Decisions

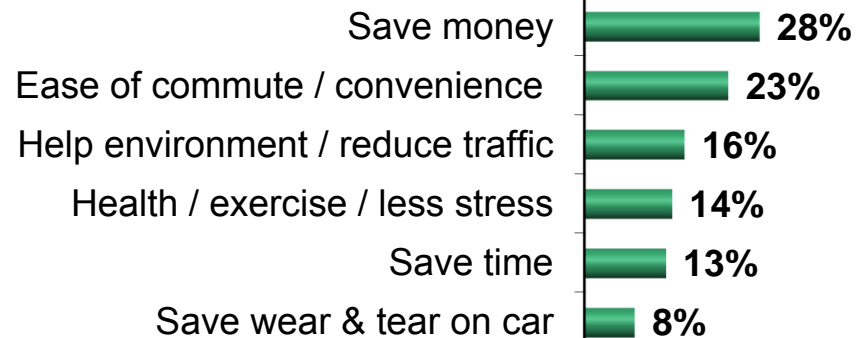
Baltimore

Other factor influenced mode choice

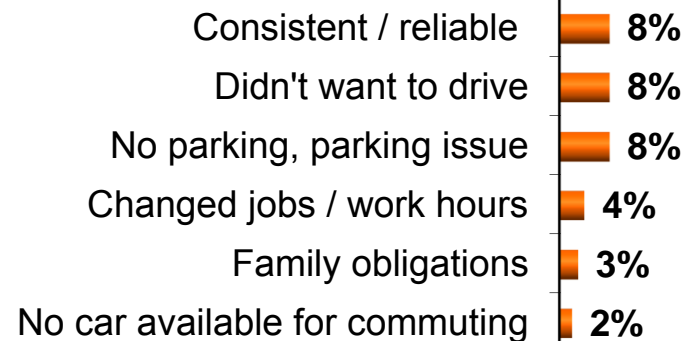
48%

(n = 543)

Personal Benefit Motivations



Personal Circumstances Motivations



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

Washington GRH

n = 797

Q48 What other factors or circumstances were important to your decision?



Use and Satisfaction

Baltimore

Made GRH trip

10%

(n = 540)

All respondents
n = 2,345

Mode During GRH

Carpool
n = 360

vanpool
n = 334

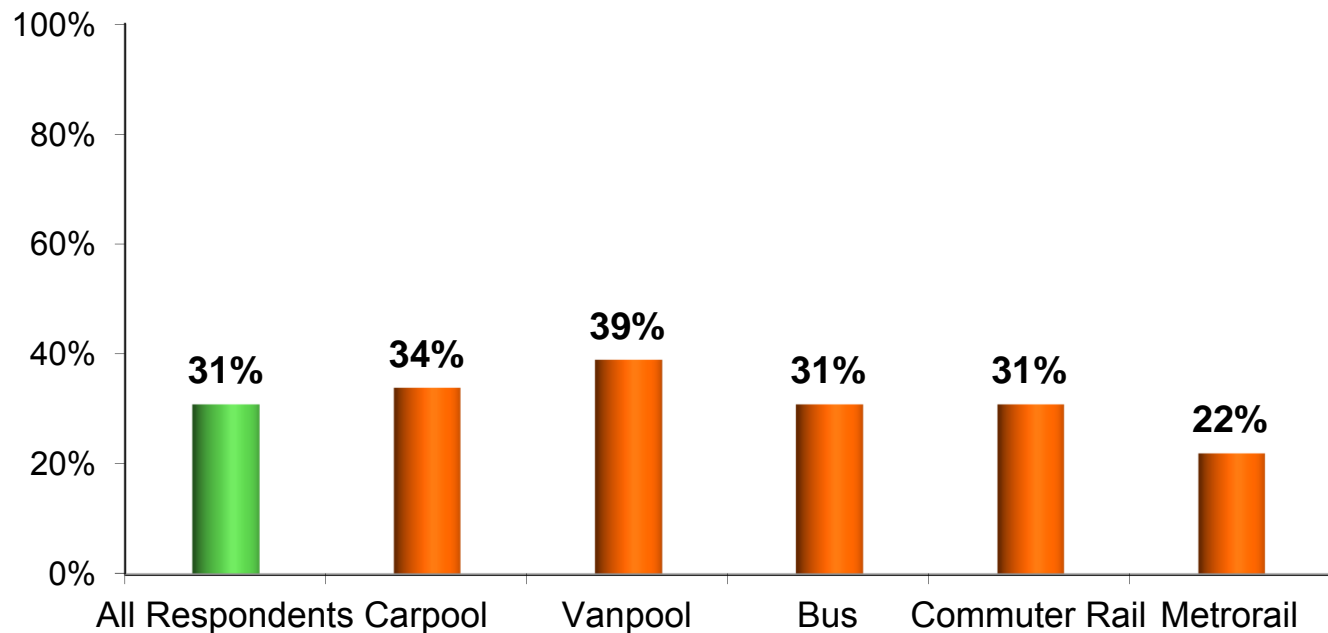
Bus
n = 703

Commuter rail n = 533

Metrorail
n = 283

Three in Ten DC GRH Registrants Made a Trip

Carpoolers and vanpoolers are more likely to have used a GRH trip than are transit riders; registrants who commute 20 or more miles also are more likely to have used a trip than are registrants with shorter commutes



Q54 Have you taken a GRH trip since you registered for GRH?

73% of DC GRH Trips were Taken To Address an Illness; 15% for Unscheduled Overtime

In Baltimore, 51% of trips were taken due to illness, 26% for unscheduled overtime

Average wait time

Washington

17 min

Baltimore

27 min

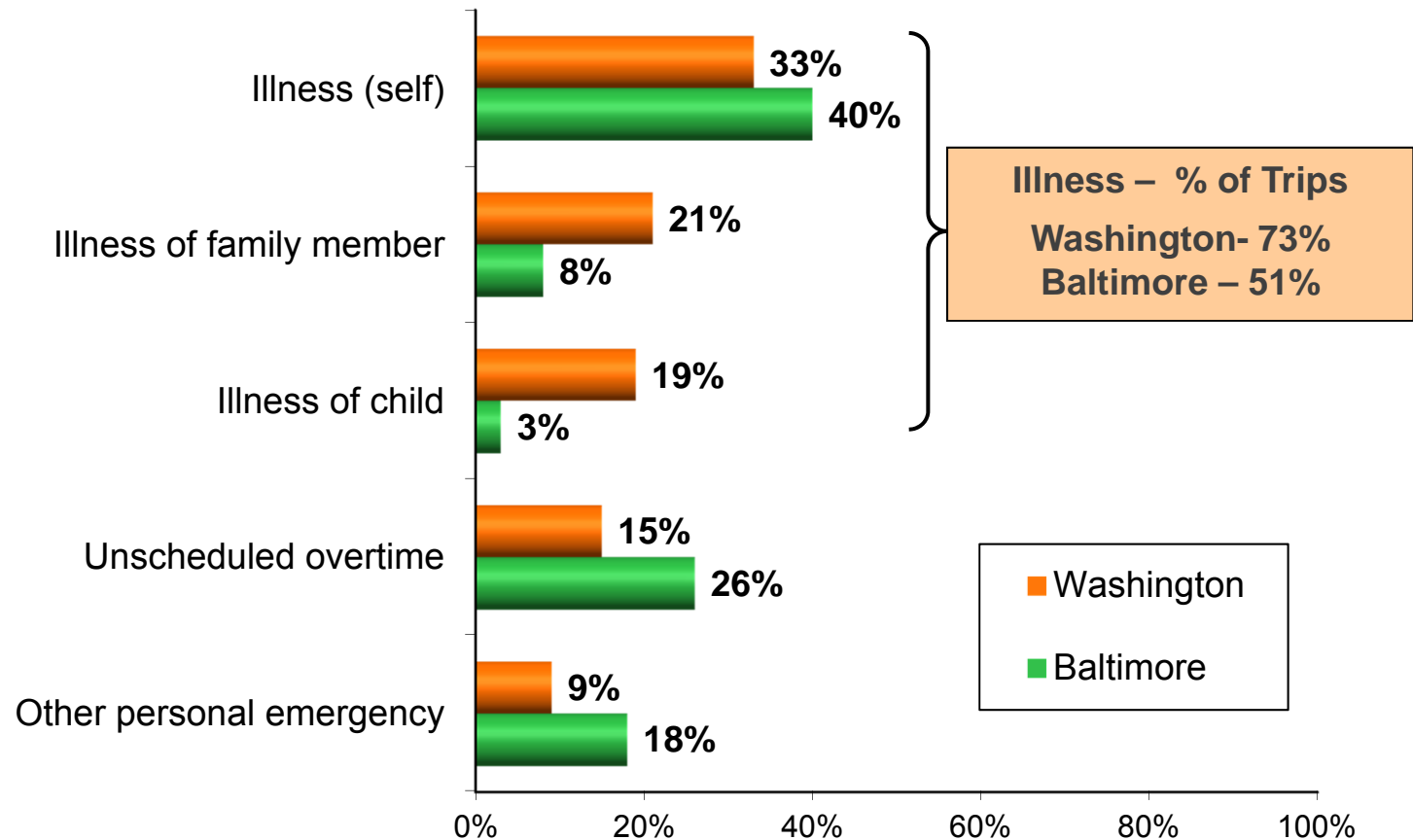
But satisfaction was similar:

Wash – 93%

Balt – 92%

Washington GRH
n = 701

Baltimore GRH
n = 55



Q55 For what reason did you take the trip?



Questions?

Contact:

Lori Diggins

LDA Consulting

202-548-0205

LDACWDC@aol.com

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