

Commuter Connections 2016 Guaranteed Ride Home Survey Highlights



Commuter Connections
Subcommittee
July 19, 2016

LDA Consulting
with CIC Research





Methodology

Survey Methodology

- Telephone survey of random sample of 2,171 GRH registrants in the Washington regional program
- Sixth triennial survey (also 2001, 2004, 2007, 2010, 2013)
- Combination of internet and telephone
 - Collect data for GRH TERM
 - Current, during, and pre-GRH travel patterns and travel changes
 - GRH influence on travel choices
 - Use of and satisfaction with GRH
 - Use of other CC services
 - Similar survey also conducted for Baltimore and St. Mary's County GRH program; results will be presented in September 2016



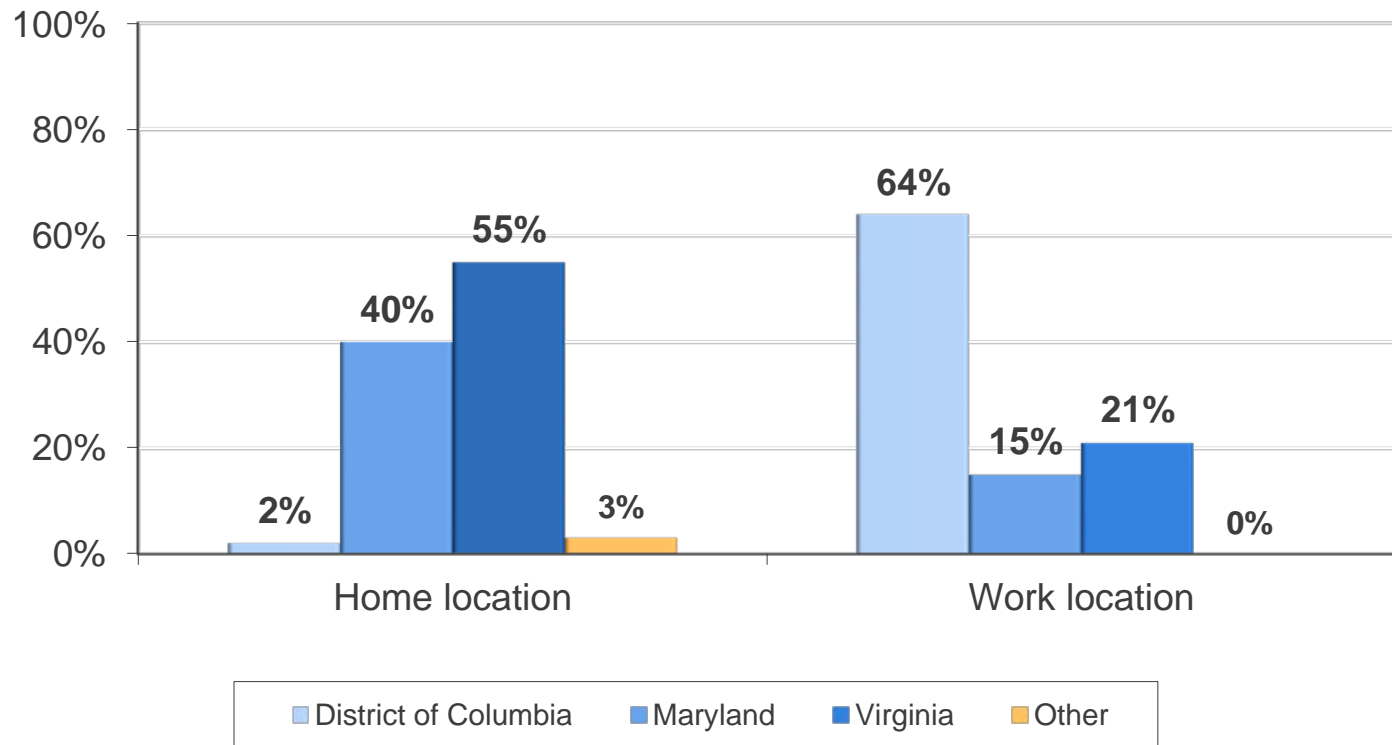


Demographics and Registration



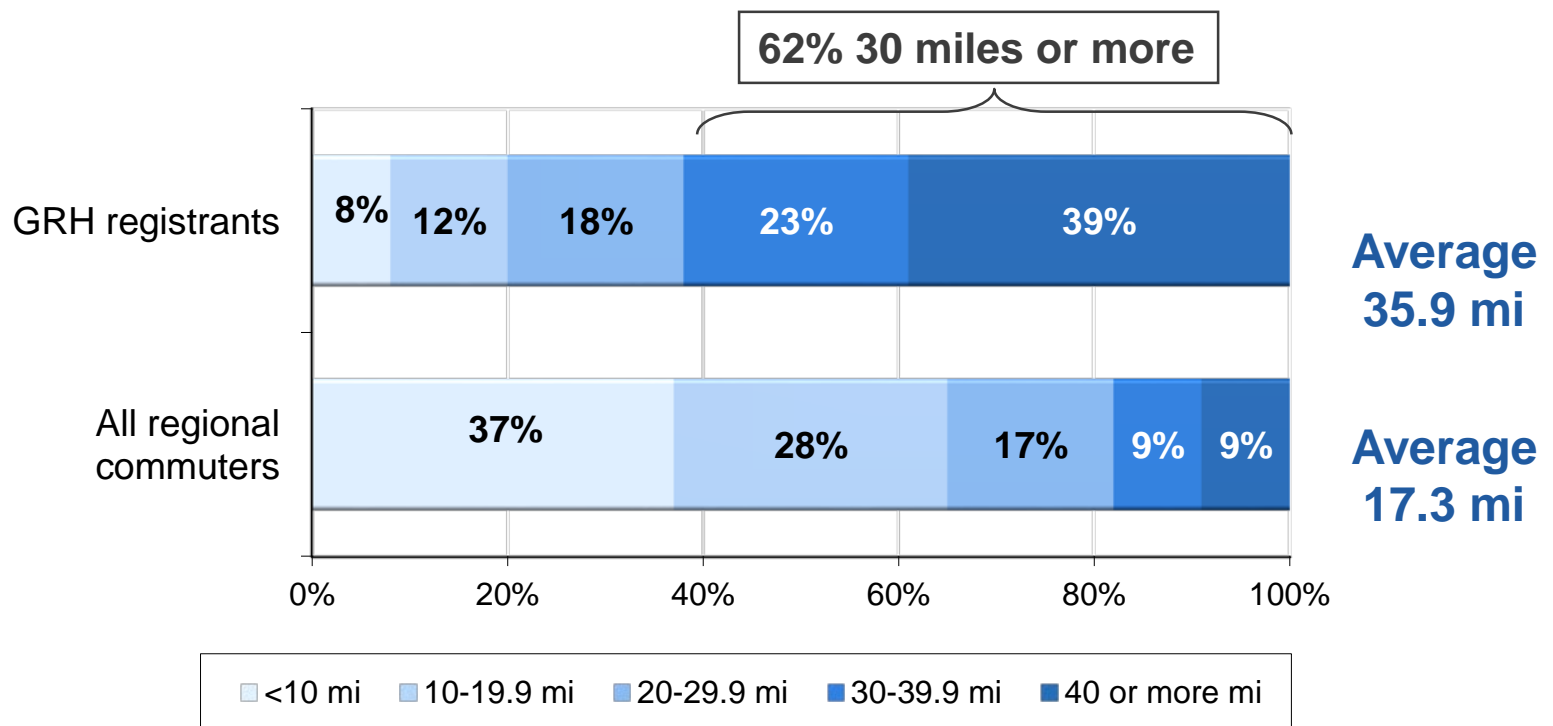
Slightly More than Half of GRH Registrants Lived in Virginia, but Two-thirds Worked in DC

The share of registrants who lived in Maryland has increased since 2010, from 32% to 40%; the Virginia share has declined from 65% to 55%.



GRH Registrants had Very Long Commutes Compared to the Average Regional Commuter

The average one-way distance for GRH participants was 35.9 miles, compared to 17.3 miles for all regional commuters; six in ten GRH participants traveled 30 or more miles

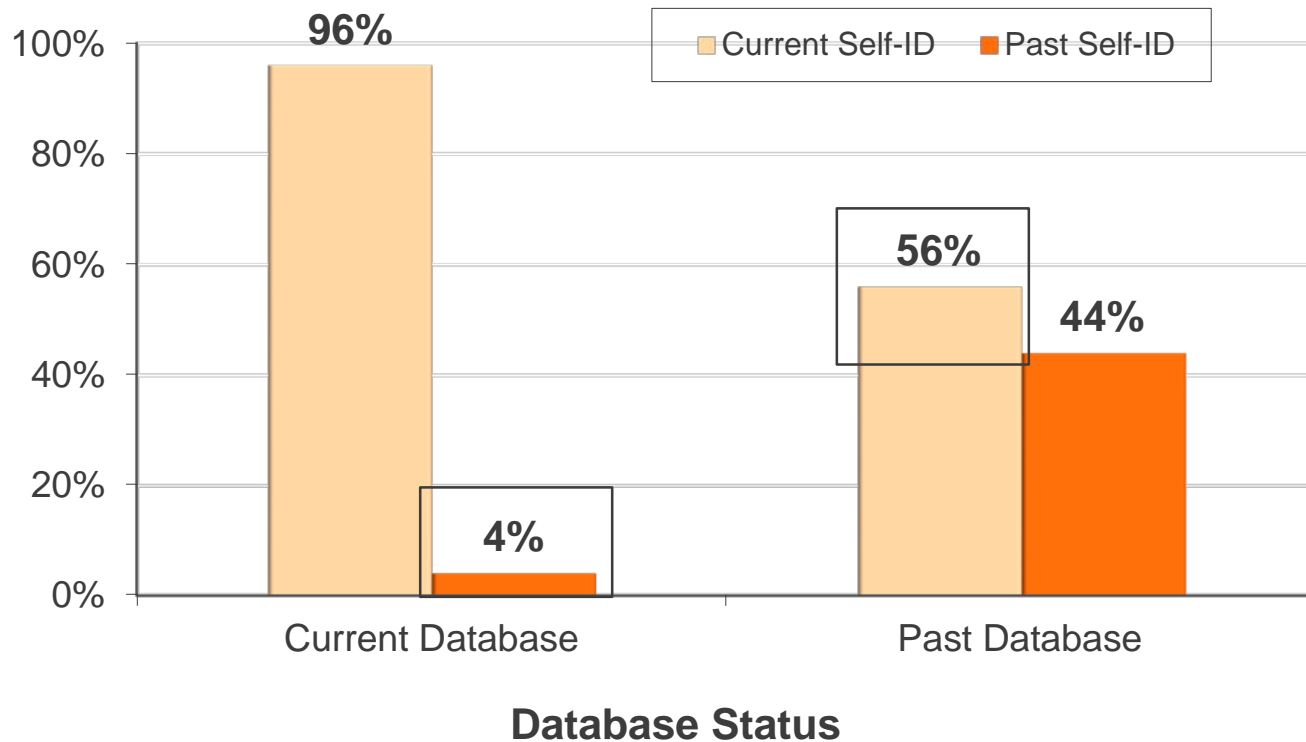


GRH registrants
n = 2,336

2016 SOC
All regional
commuters
n = 4,766

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

Most Current Participants Correctly Identified their GRH Status, but 56% of Past Registrants Thought they were Still Registered



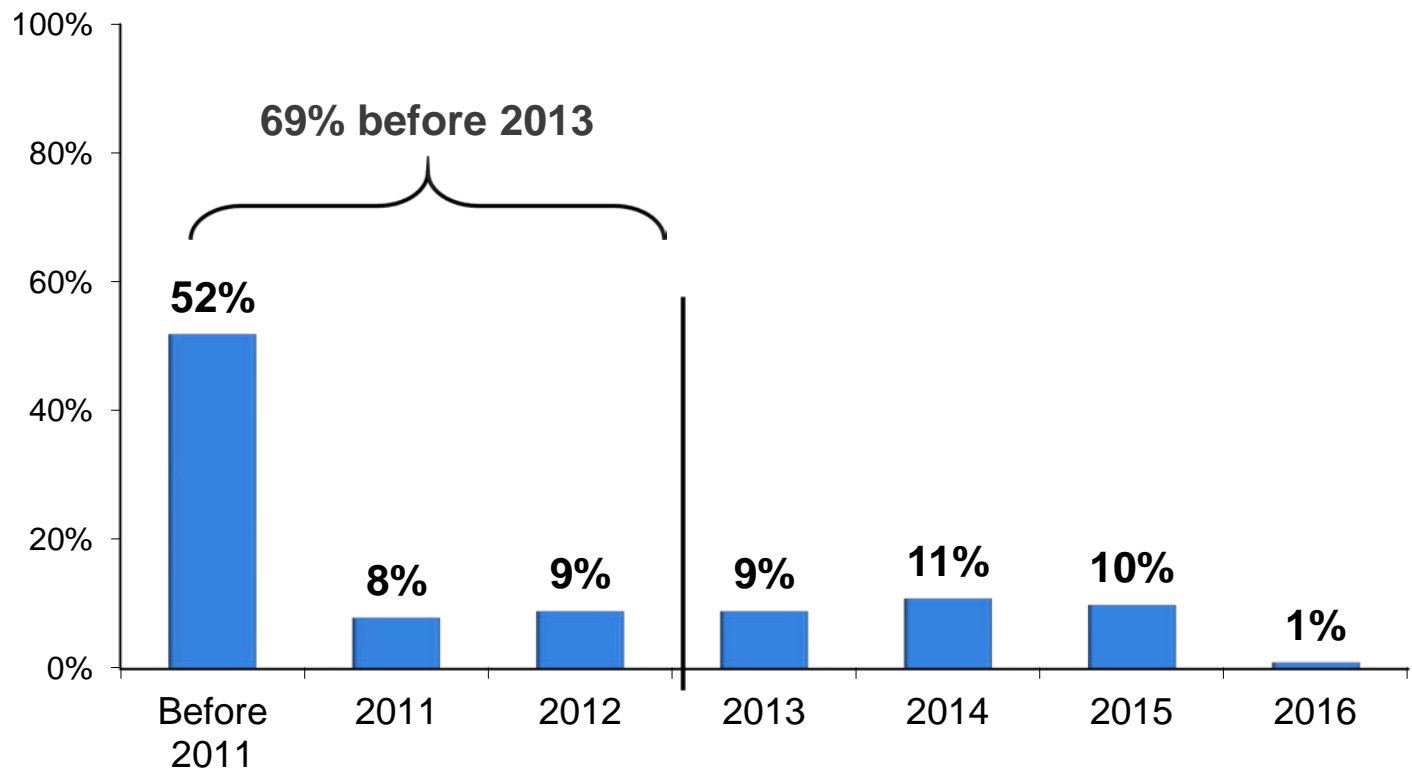
Database Status

Current
n = 1,098

Past
n = 1,063

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

Seven in Ten GRH Participants Registered Before 2013; 52% Registered before 2011



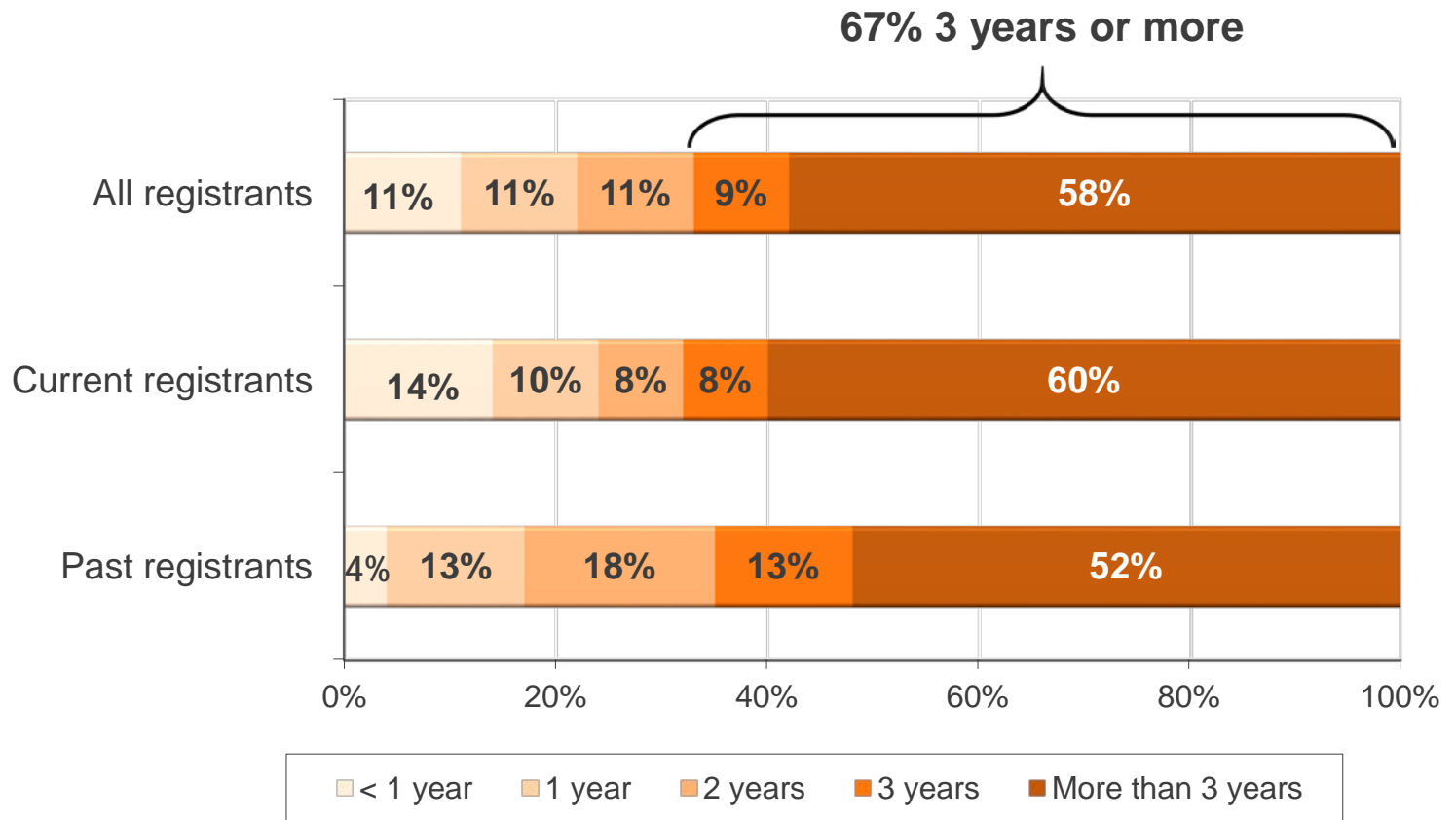
n = 1,797

Note: 374 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?

Two-thirds of Registrants Participated 3 or More Years

68% of current registrants had been participating for 3 or more years;
65% of past registrants participated this long



All registrants
n = 1,778

Current registrants
n = 1,394

Past registrants
n = 384

Note: Excludes registrants who did not remember when they registered. They are not included in the base for the percentages

Q4 How long were you registered in the GRH program?

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

Reasons in 2016 were essentially the same as in 2013

2013 Survey

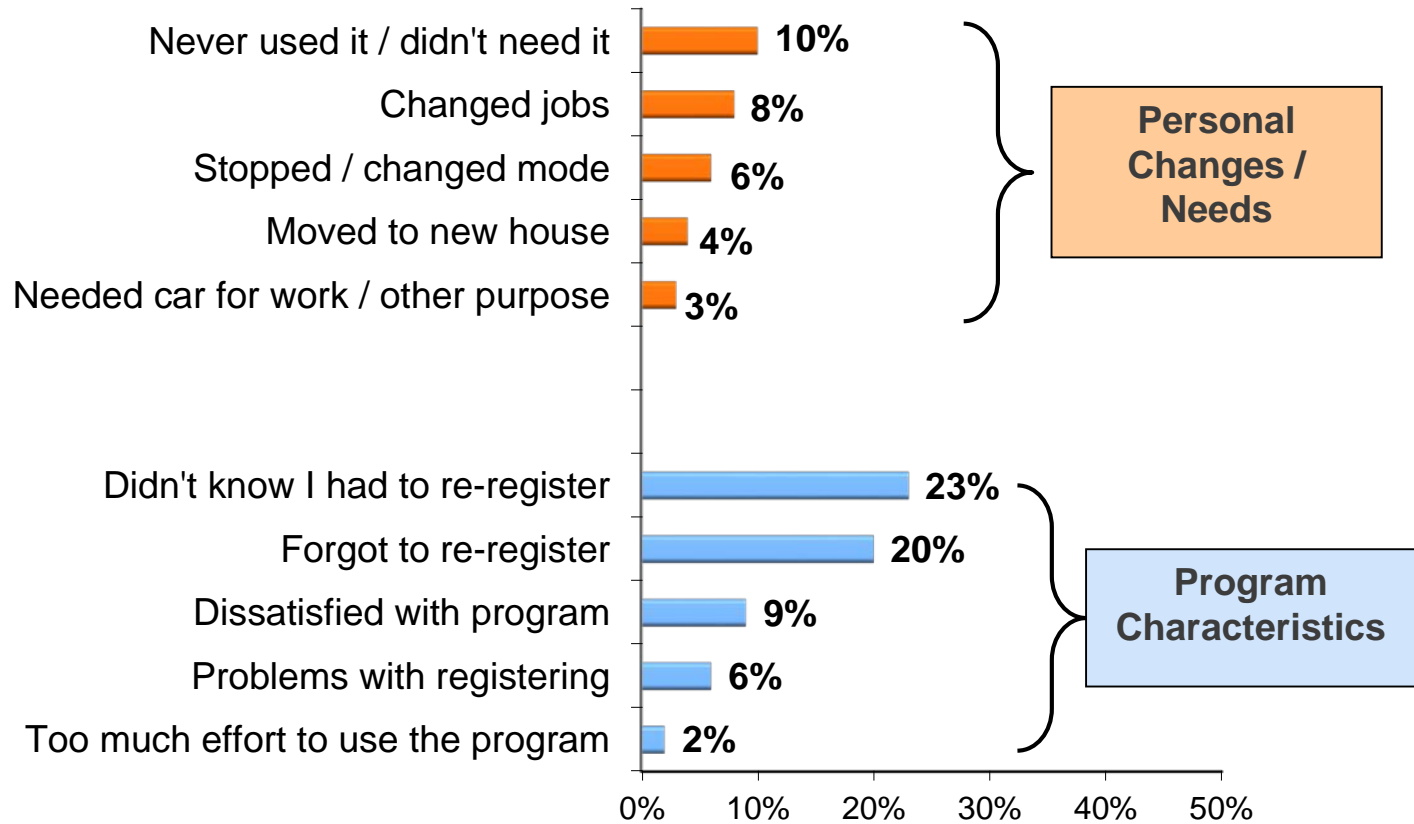
Didn't know I had to 23%

Forgot – 18%

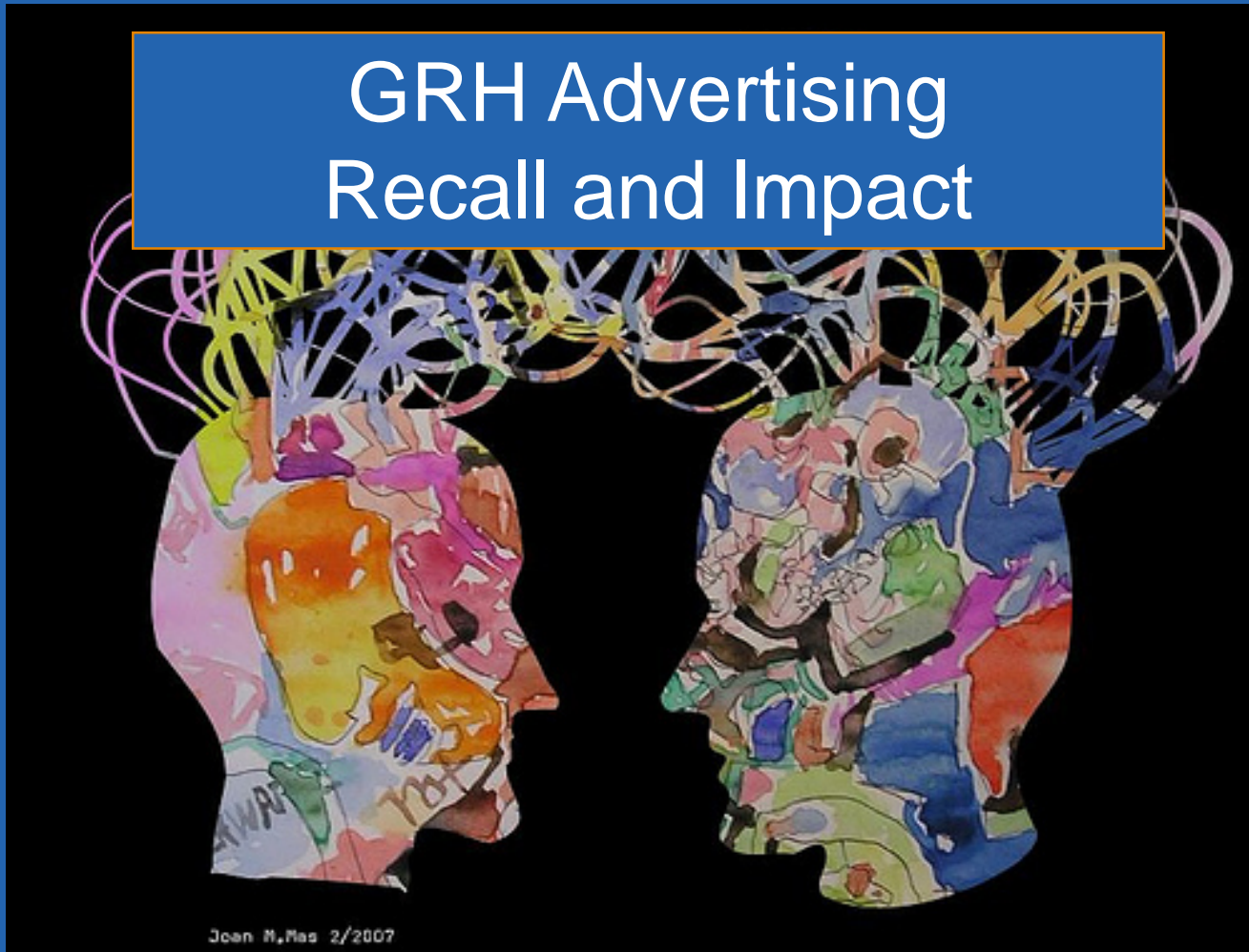
Never used it – 9%

Problem with re-reg – 7%

Dissatisfied – 6%

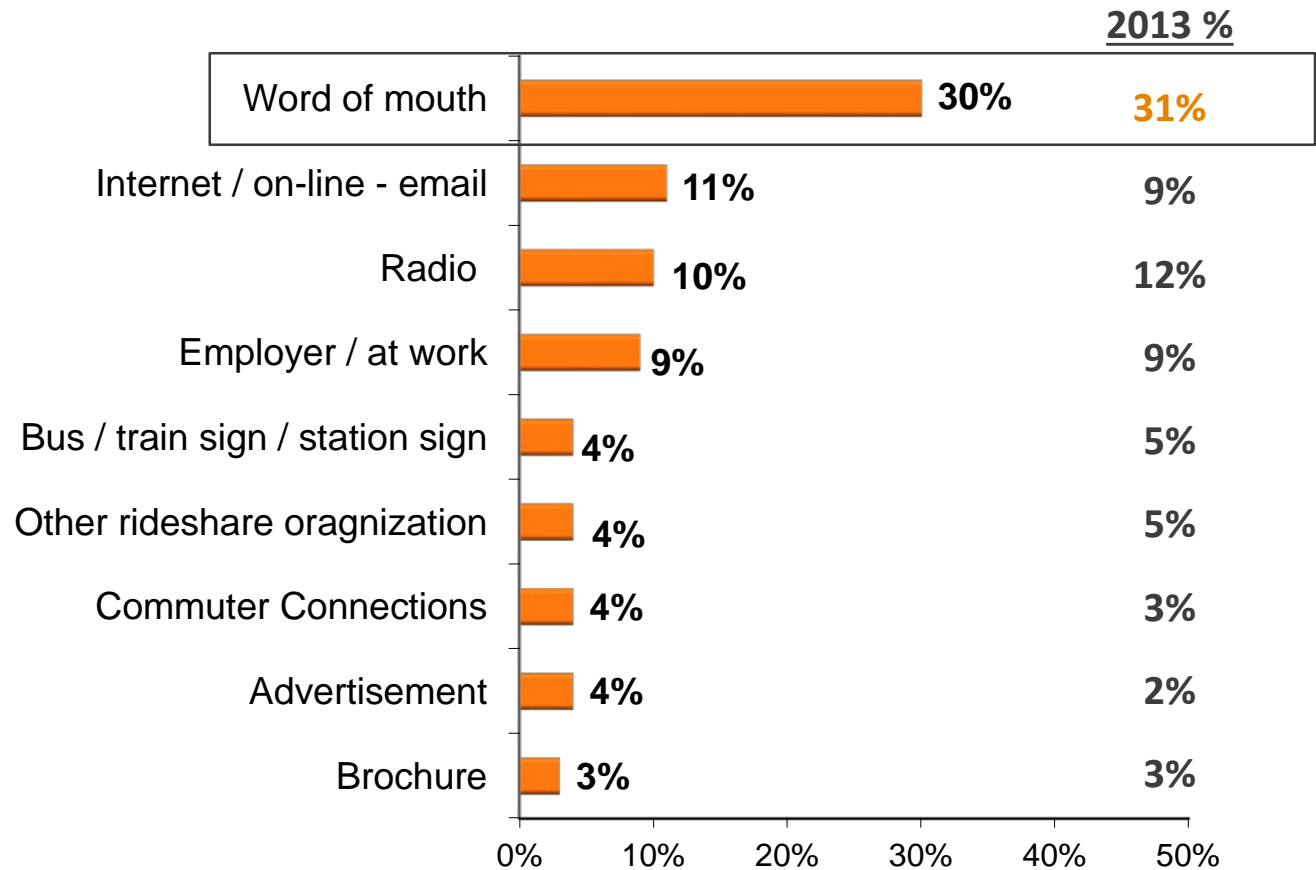


GRH Advertising Recall and Impact



Word of Mouth Continued to be the Way Most Registrants Learned About GRH

Similar sources to those mentioned in the 2013 survey



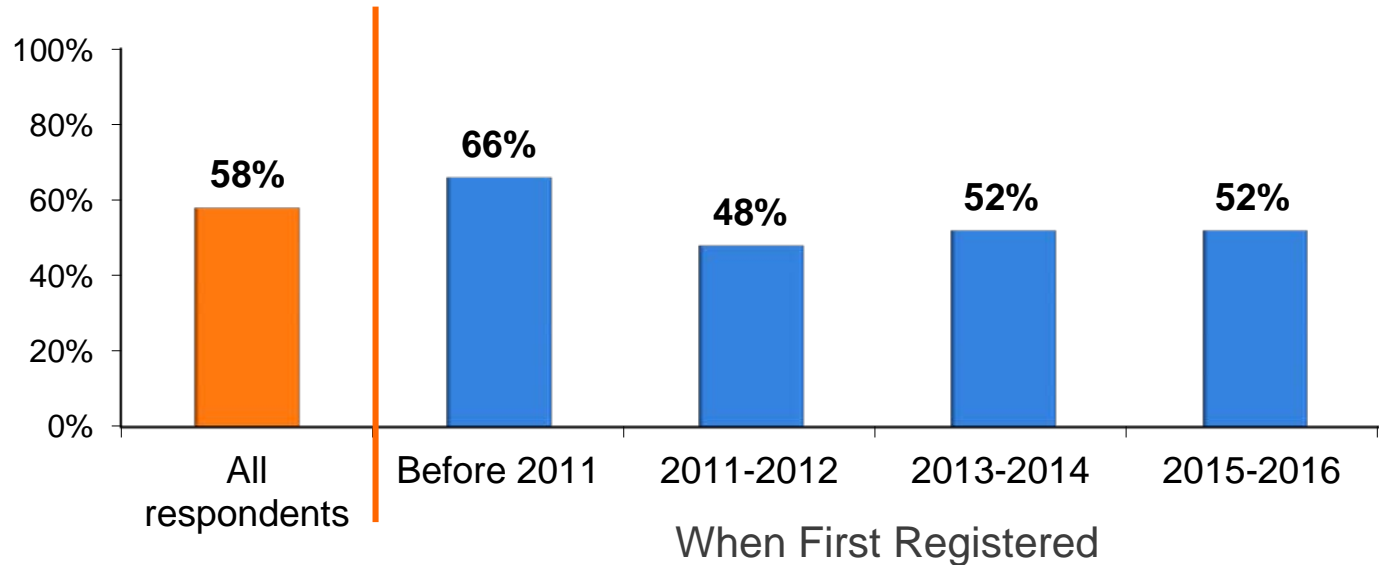
2013
n = 2,374

2016
n = 2,171

Q49 How did you hear about the GRH Program?

58% of All Participants Heard or Saw GRH Ads

Respondents who registered before 2011 were more likely to have seen or heard GRH ads – 66% recalled ads, compared to 48% of respondents who registered during 2011-2012 and 52% who registered in 2013 or later



All
Respondents
n = 2,171

Before 2011
n = 923

2011-2012
n = 305

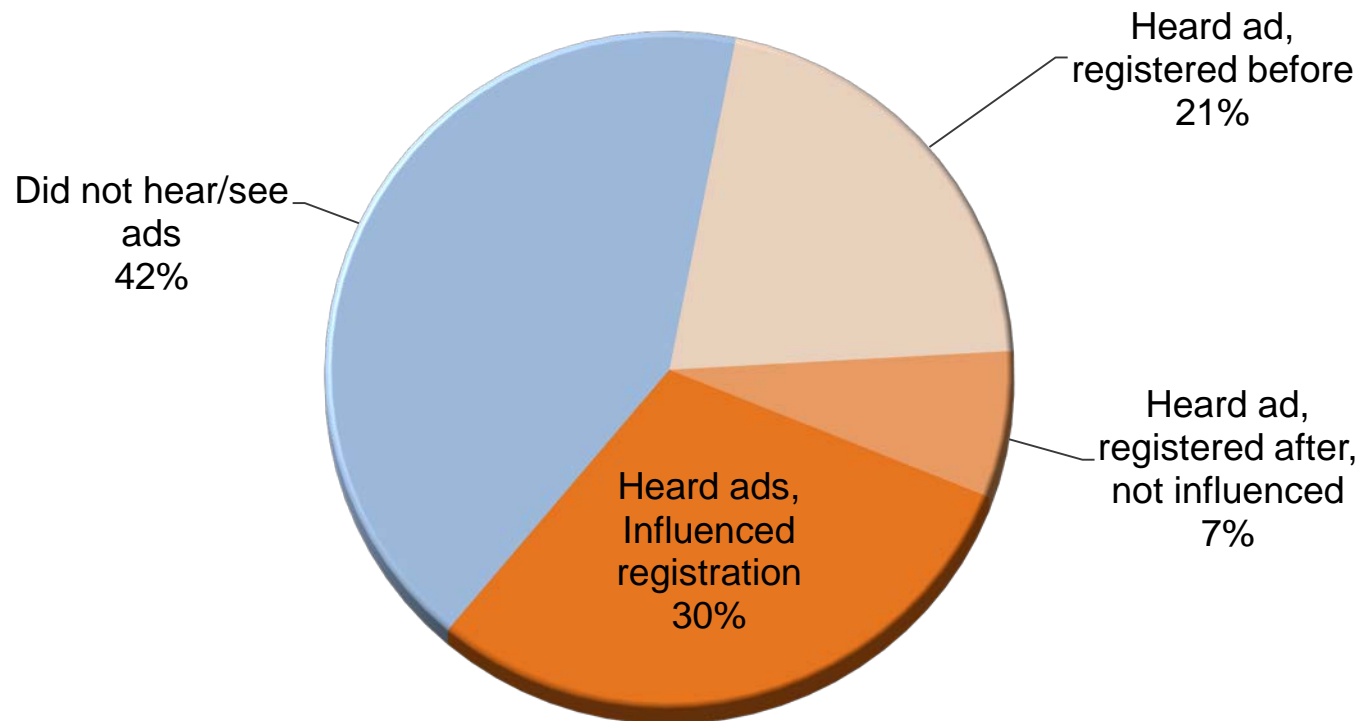
2013-2014
n = 346

2015-2016
n = 223

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

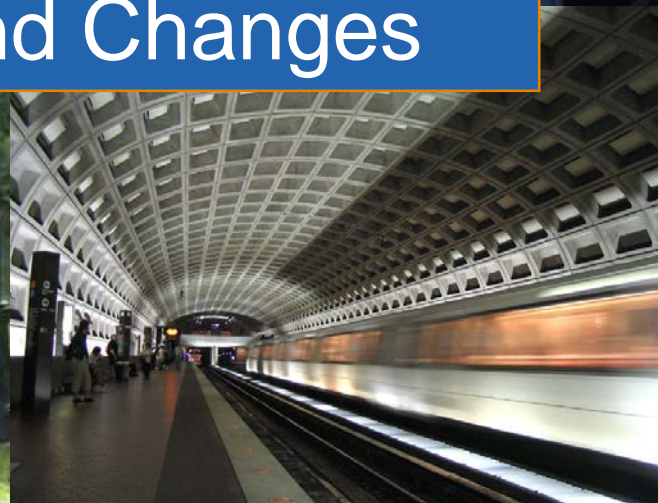
Three in Ten Registrants Heard GRH Ads Before they Registered and Ads Influenced them to Register

Other participants did not hear ads (42%), registered before they heard the ads (11%), or heard the ads but were not influenced by the ad (7%)



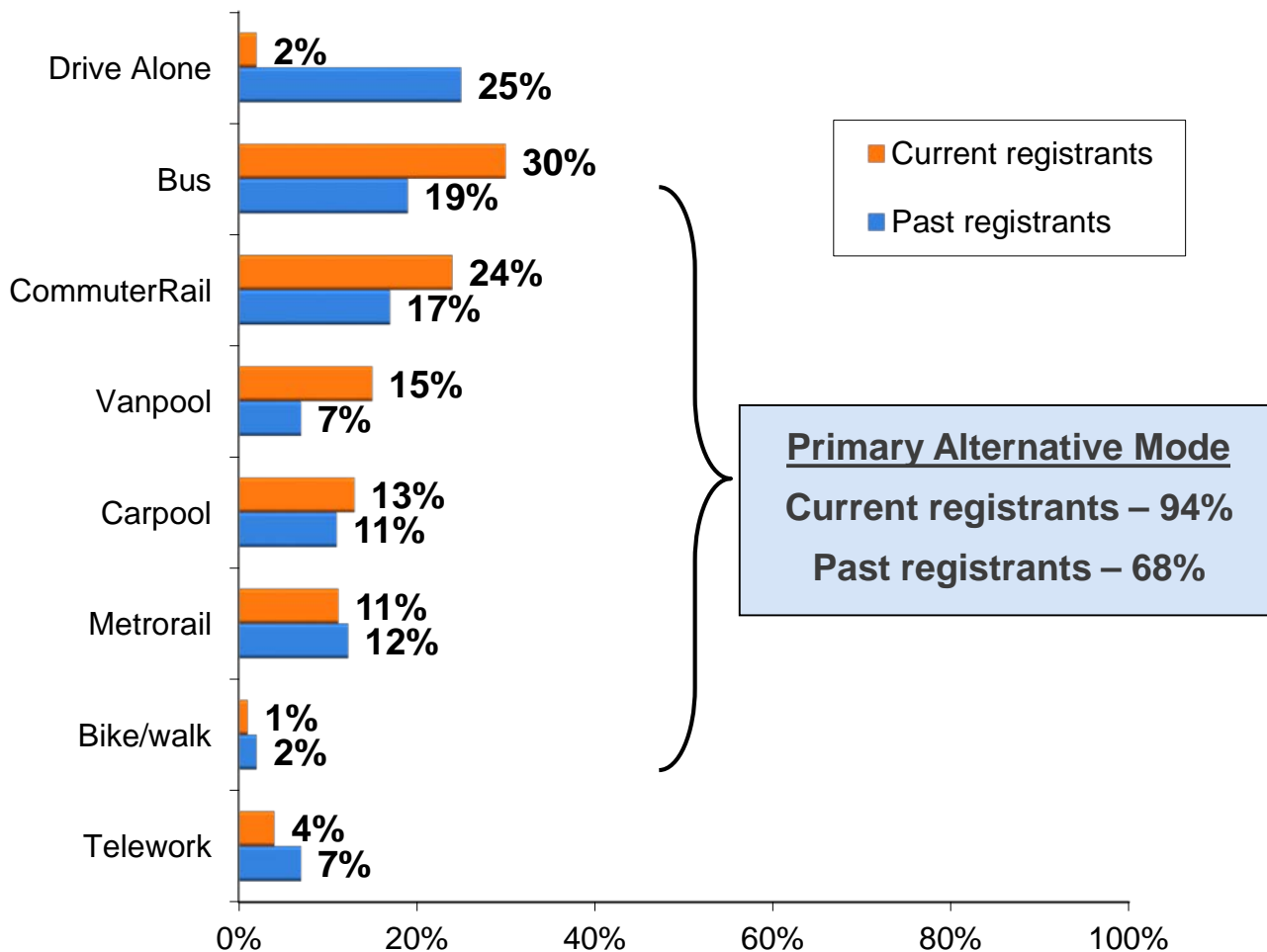


GRH Commute Patterns and Changes



Nearly All Current Registrants Used an Alternative Mode as their Primary Mode

68% of PAST registrants also used alt modes, same as in 2010, 2013



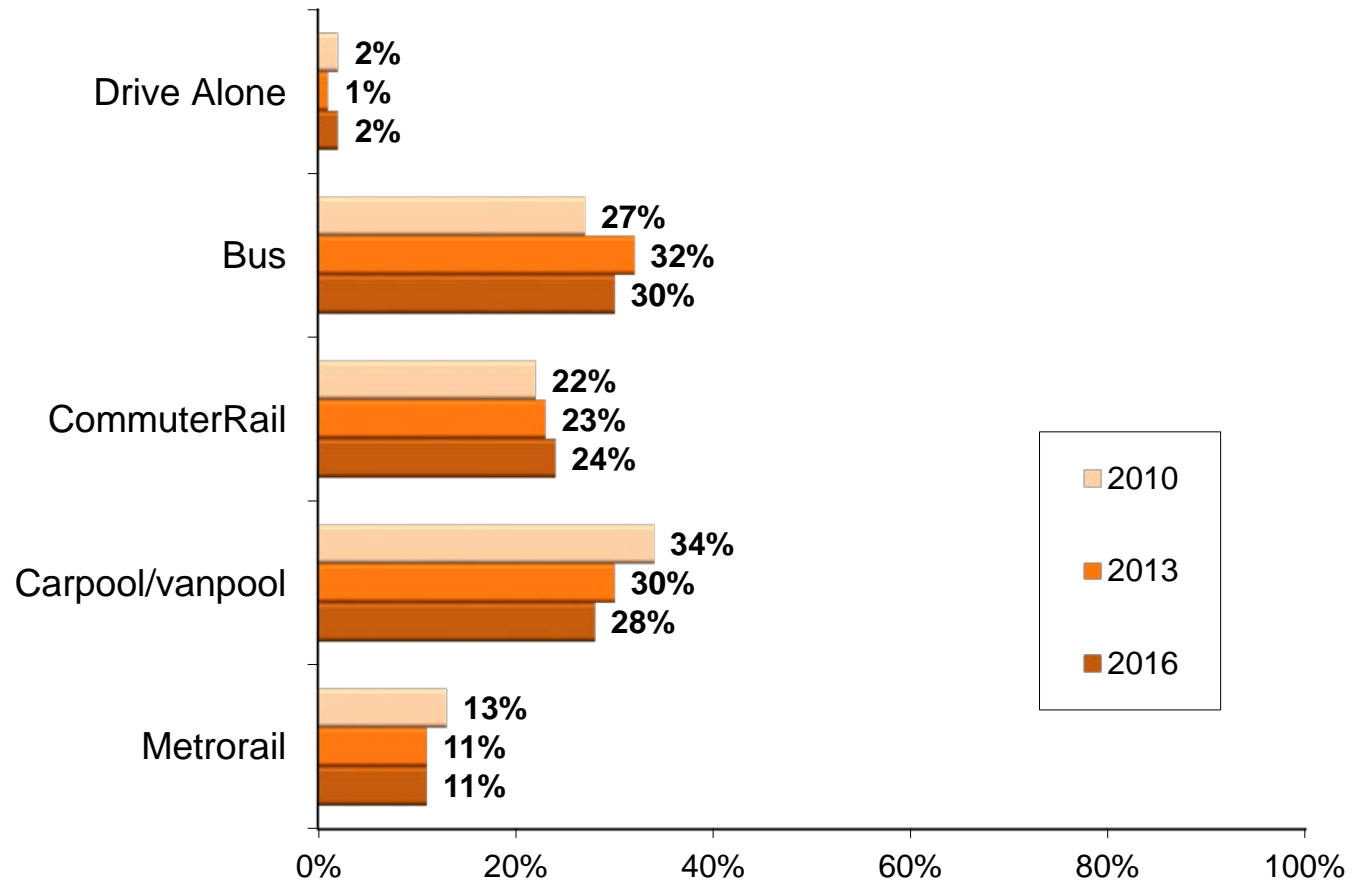
Current registrants
n = 1,670

Past registrants
n = 501

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

Bus and Commuter Rail Accounted for a Larger Share of Current Registrants' 2016 Mode Use vs 2010

Carpool /Vanpool share declined 6 points since 2010



2010
n = 788

2013
n = 1,773

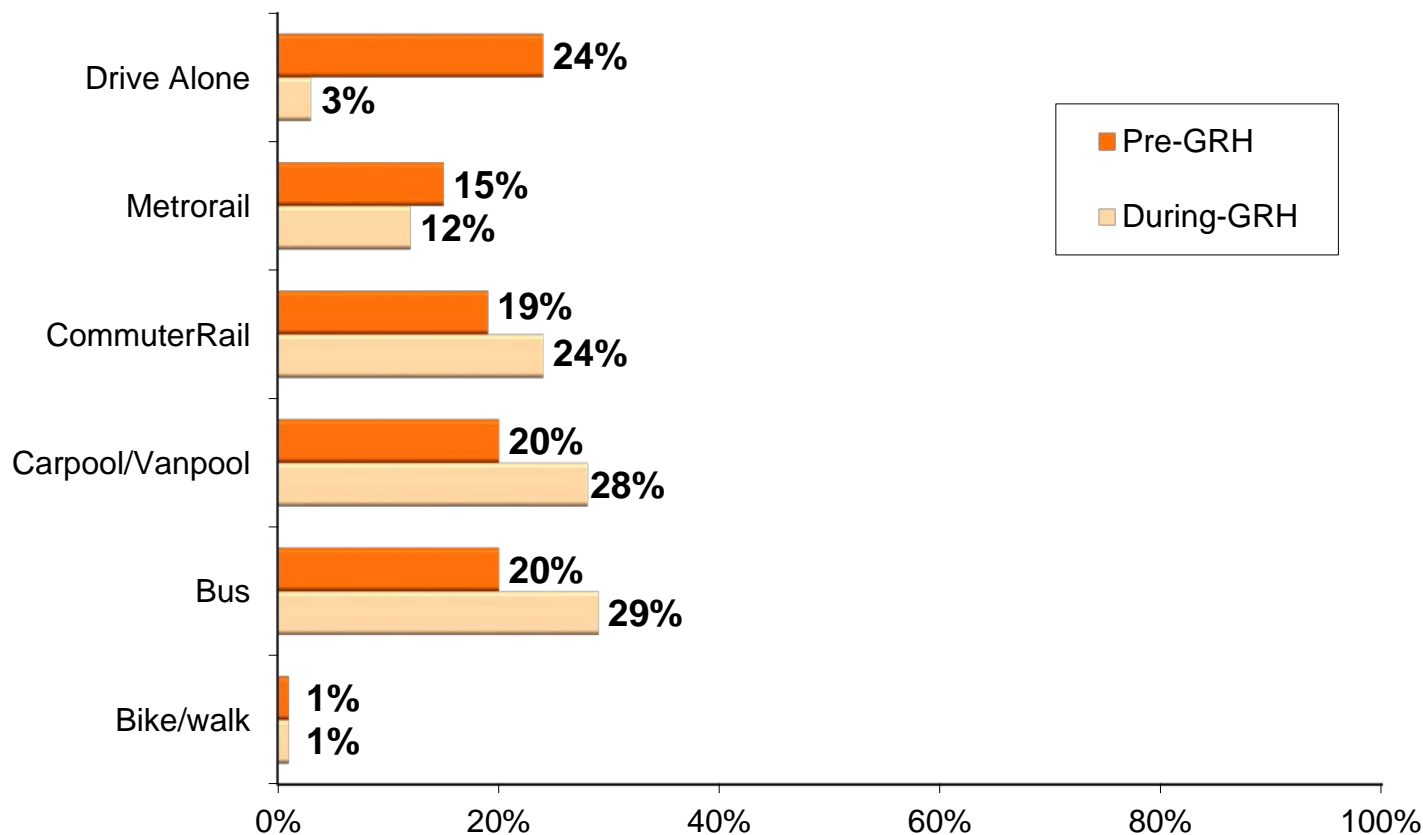
2016
n = 1,670

Chart excludes
telework primary
mode

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

24% Drove Alone Pre-GRH; 3% Drove Alone During-GRH; Mode Shares for Most Alt Modes Increased

CP/VP increased from 20% to 28%, bus use rose from 20% to 29%, and commuter rail grew from 19% to 24%



During GRH
n = 2,171

Pre GRH
n = 2,085

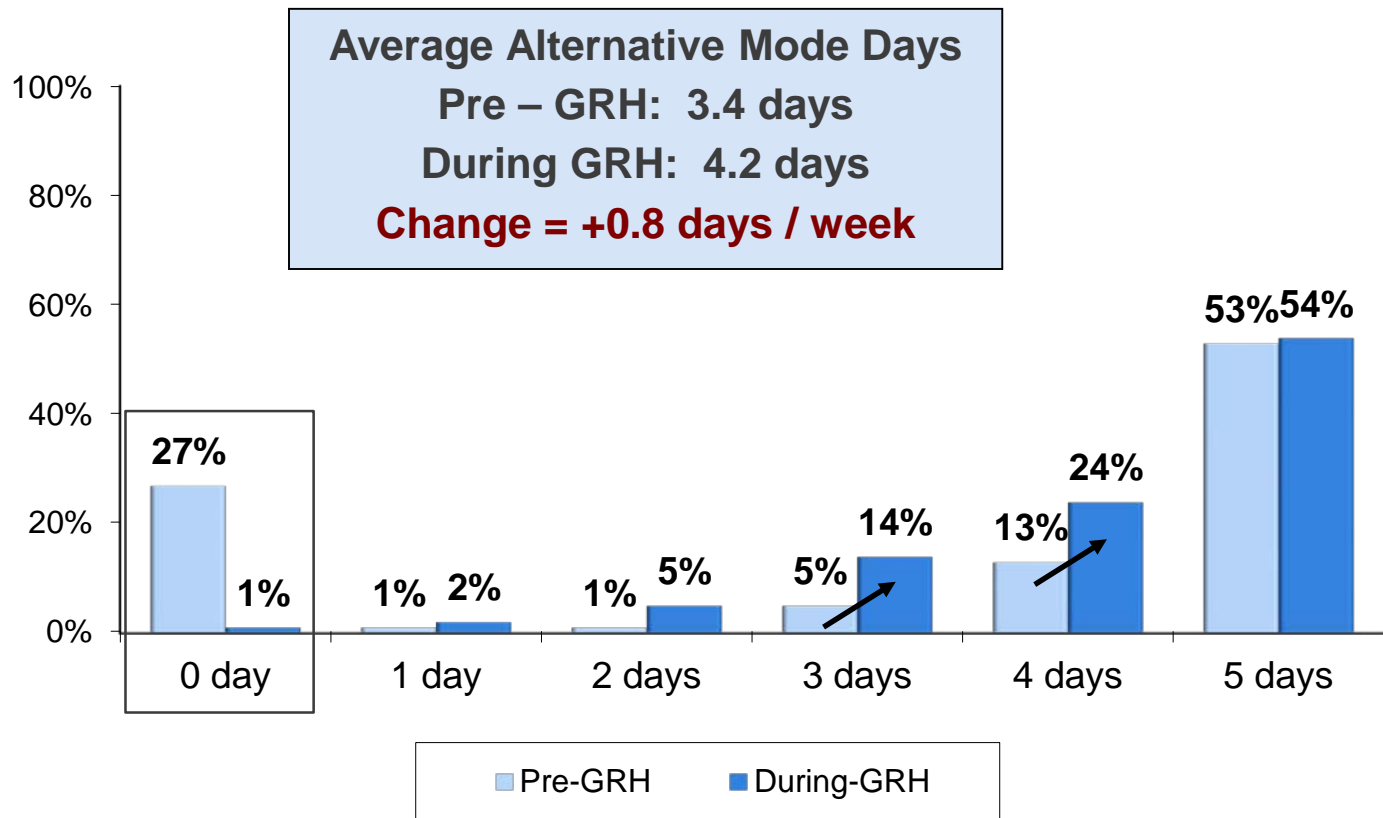
Chart excludes
telework primary
mode

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 Alternative Mode Days Increased from 3.4 Days per Week to 4.2 Days per Week

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



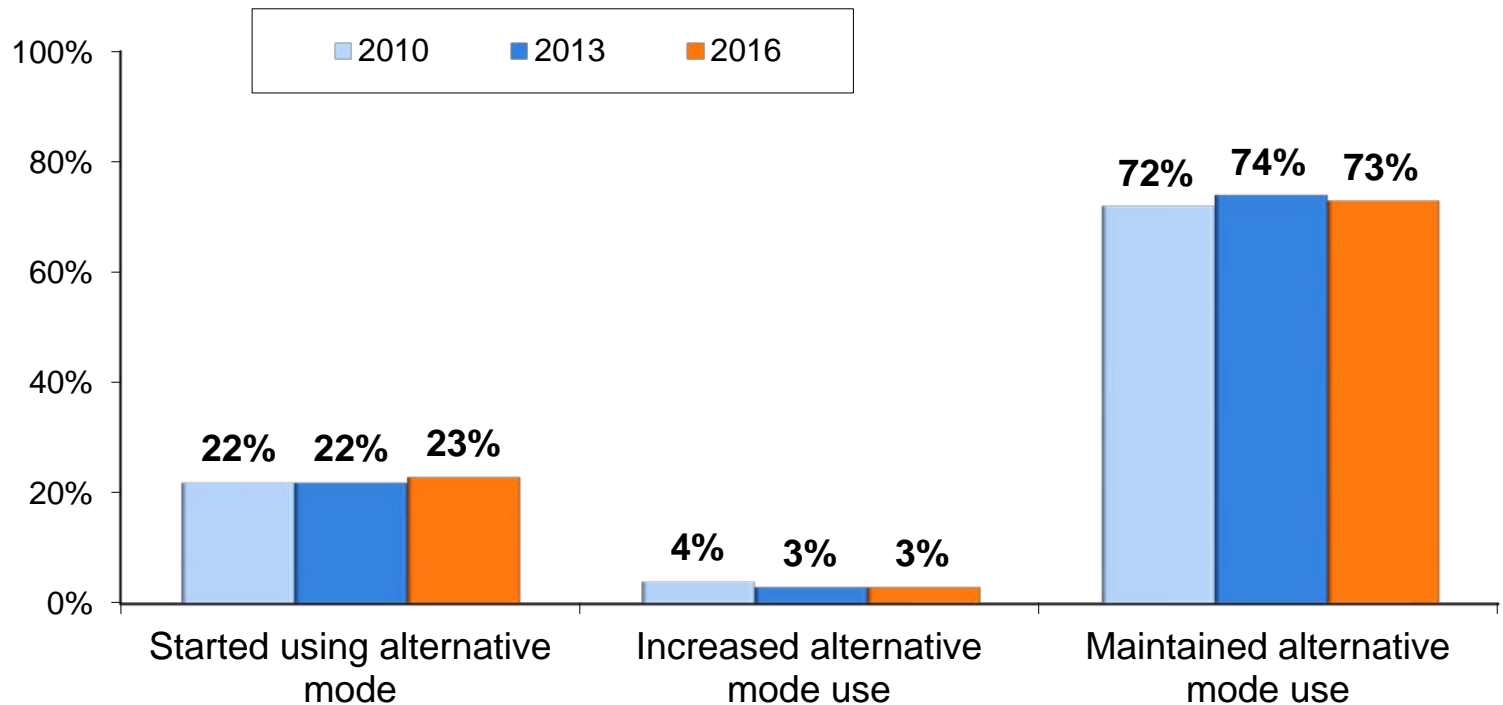
During GRH
n = 2,171

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?

In 2016, 23% of GRH Registrants Shifted from Driving Alone to Alternative Modes; 3% Increased Alternative Mode Use After Joining

The proportions of alt mode changes have been consistent since 2010



2010
n = 972

2013
n = 2,374

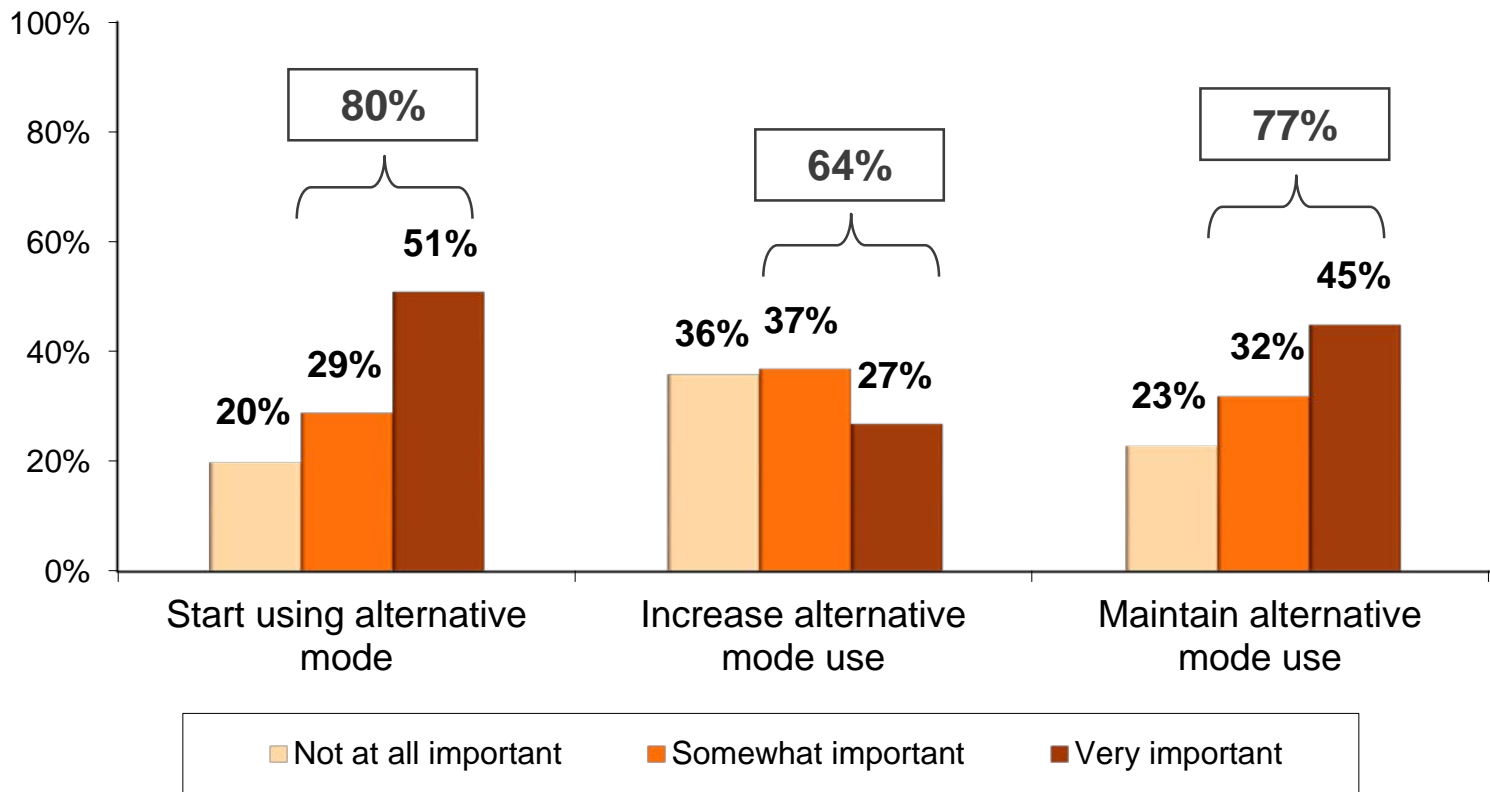
2016
n = 2,085

Totals will not add to 100% because some respondents said they did not use an alternative mode "During-GRH"

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

About 8 in 10 Respondents said GRH was Important to Their Decisions to Start a New Alternative Mode or Continue an Existing Alternative Mode

GRH seemed less important to respondents' decisions to increase alternative mode use



Start alt mode
n = 468

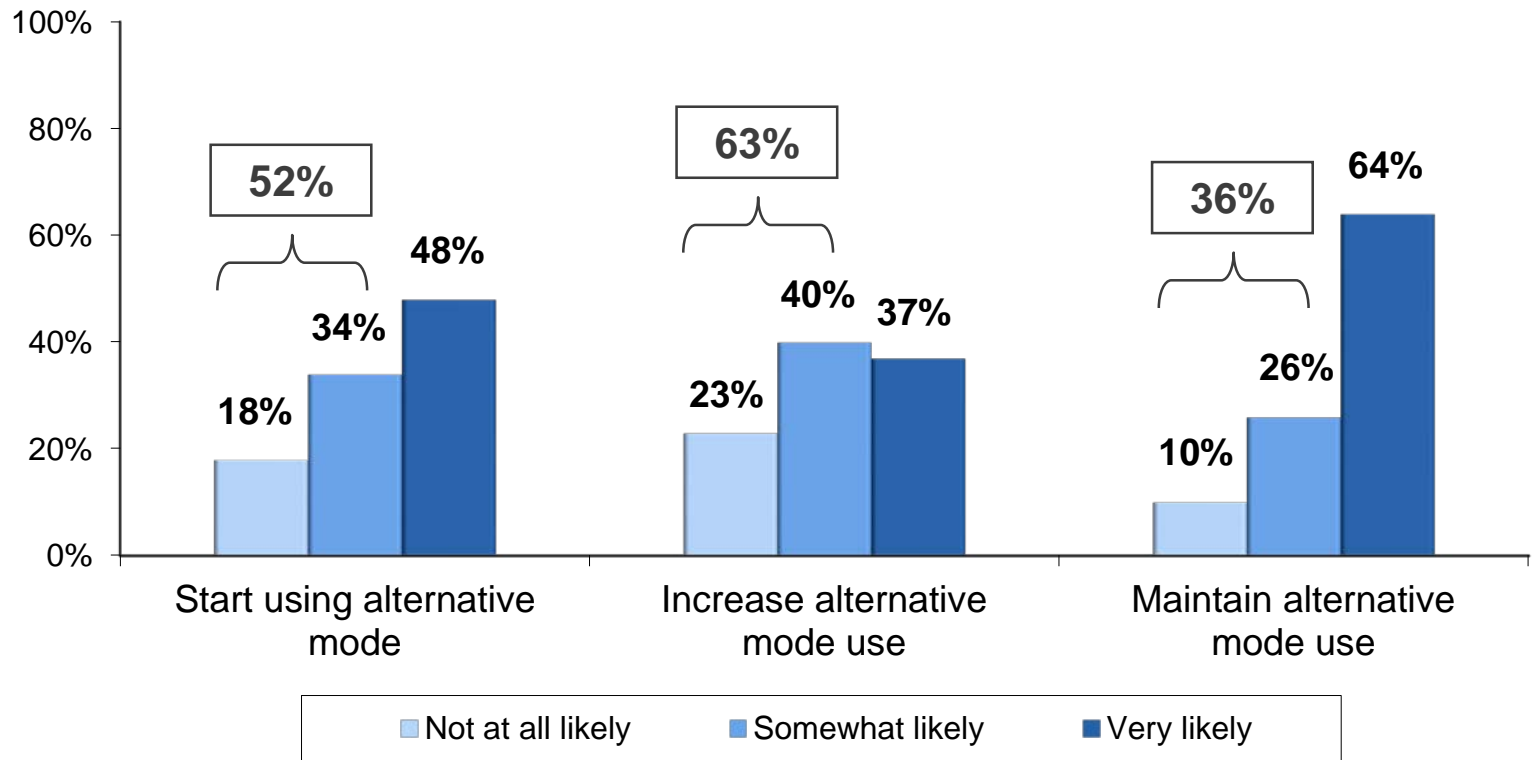
Increase alt mode
n = 58

Maintain alt mode
n = 1,459

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

Half of Respondents who Started Using Alternative Modes and Half Who Increased Alt Mode Use Were Not Likely/Only Somewhat Likely to Switch without GRH

GRH was less valuable to maintaining use of existing alt mode



Start alt mode
n = 453

Increase alt mode
n = 53

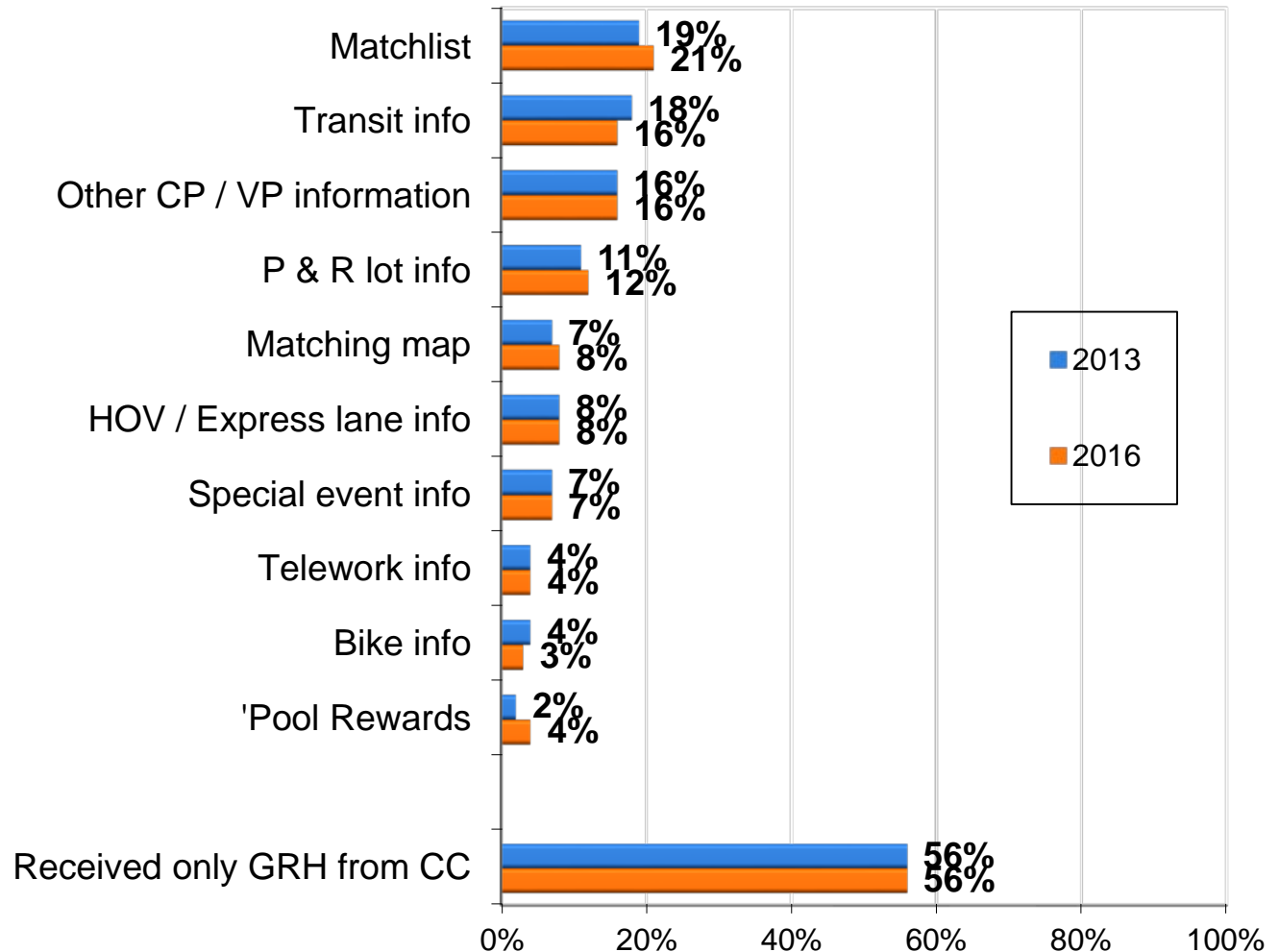
Maintain alt mode
n = 1,424

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

44% of GRH Registrants Received Other CC Services

Most common – matchlist, transit info, other CP/VP info, P&R info

But 59% who received other services said GRH was the most important service in their mode choice decisions

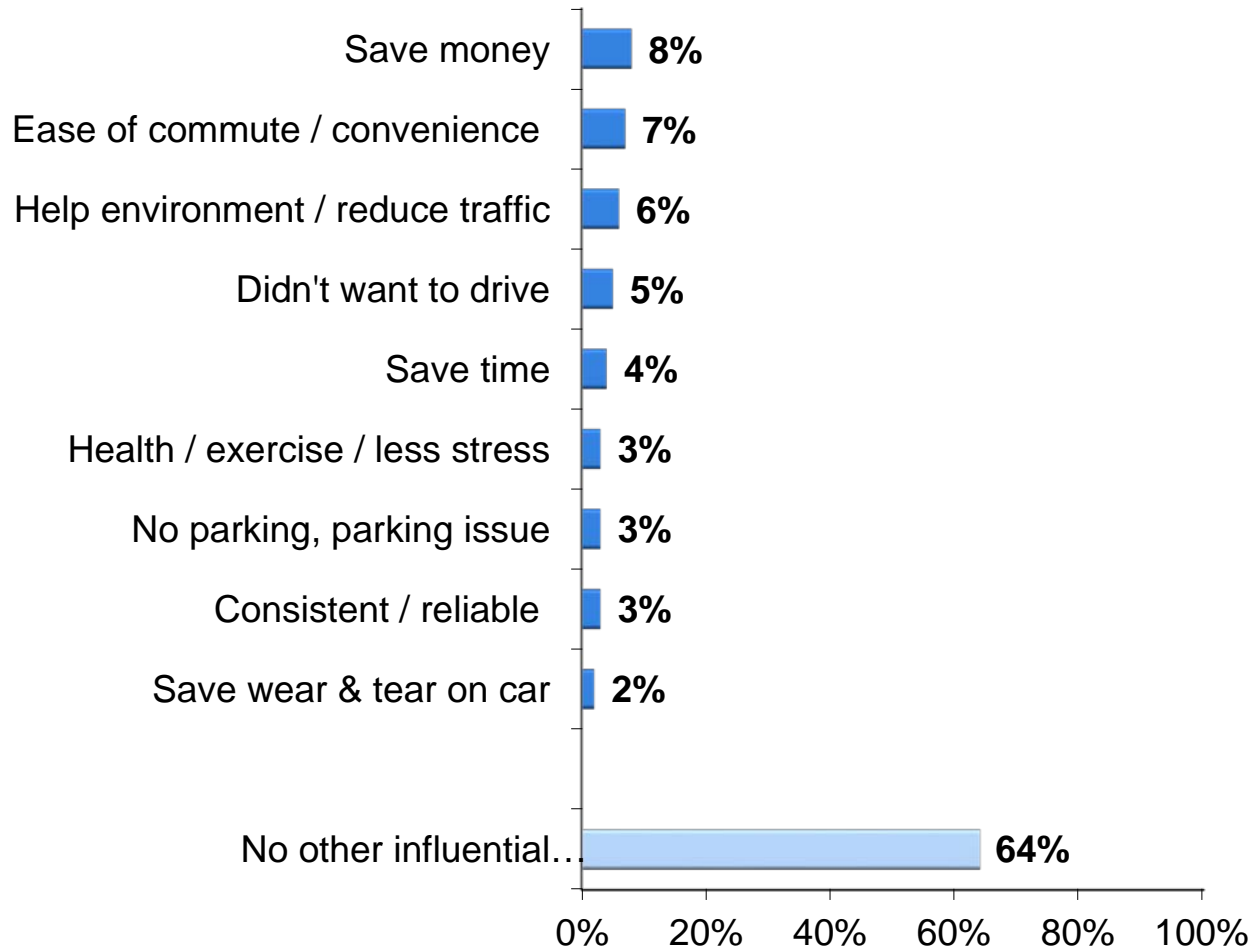


2013
n = 2,293

2016
n = 2,171

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

36% of Respondents Also Cited Non-Commute Service Factors that Influenced their Decisions

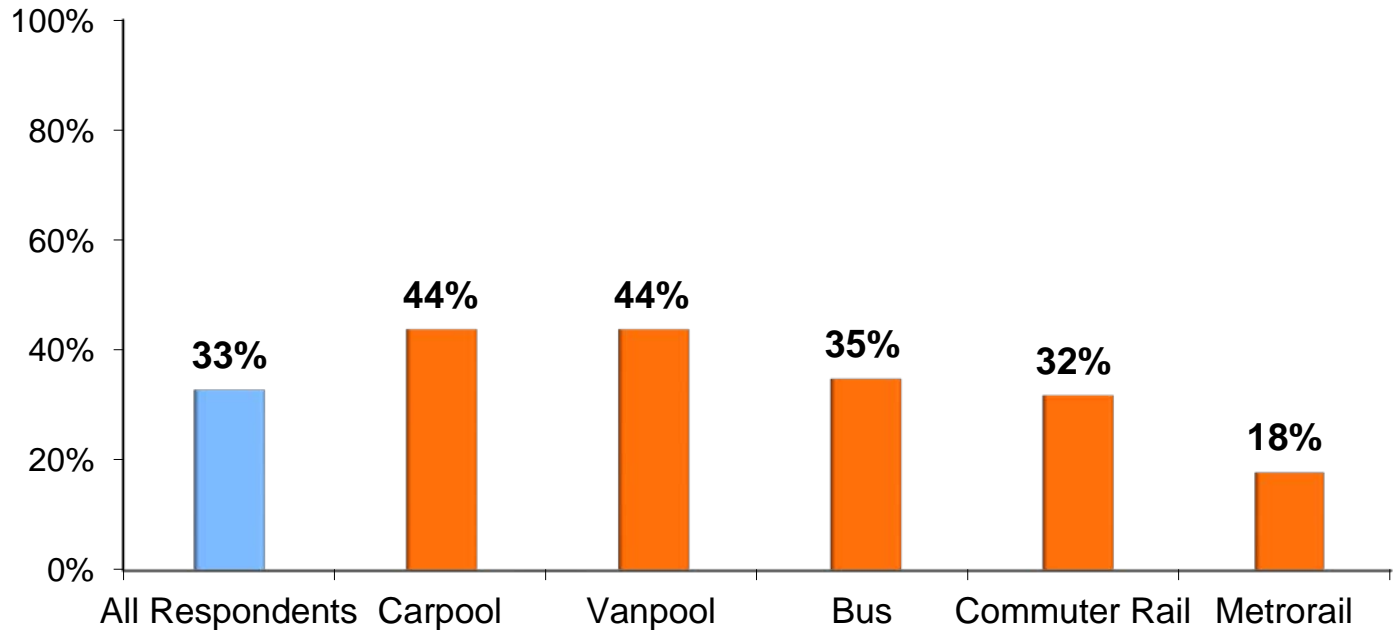




Use and Satisfaction

Three in Ten GRH Registrants Made a Trip

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



All respondents
n = 2,141

Mode During GRH

Carpool
n = 267

vanpool
n = 294

Bus
n = 587

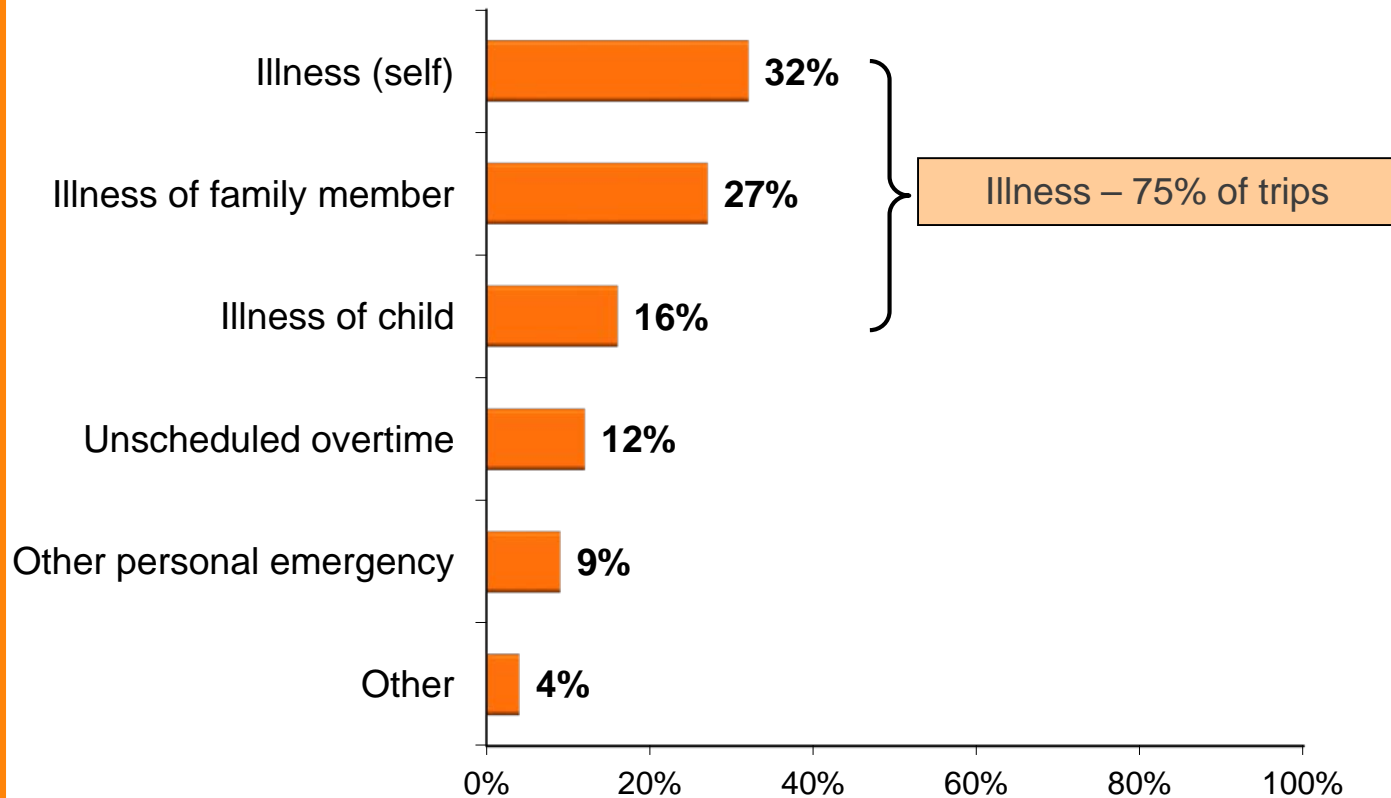
Commuter rail
n = 485

Metrorail
n = 234

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

75% of GRH Trips were Taken To Address an Illness; 12% for Unscheduled Overtime

Respondents waited on average 15 minutes for the taxi to arrive; 94% of respondents who used a trip said they were satisfied





Questions?

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