

Commuter Connections 2016 Baltimore & St. Mary's County Guaranteed Ride Home Survey Highlights



Commuter Connections
Subcommittee
September 20, 2016

LDA Consulting
with CIC Research





Methodology

Survey Methodology

- Telephone survey of random sample of 329 GRH registrants in the Baltimore/St. Mary's Co regional program
- Second triennial survey (also 2013)
- Combination of internet and telephone
 - Collect data on:
 - 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



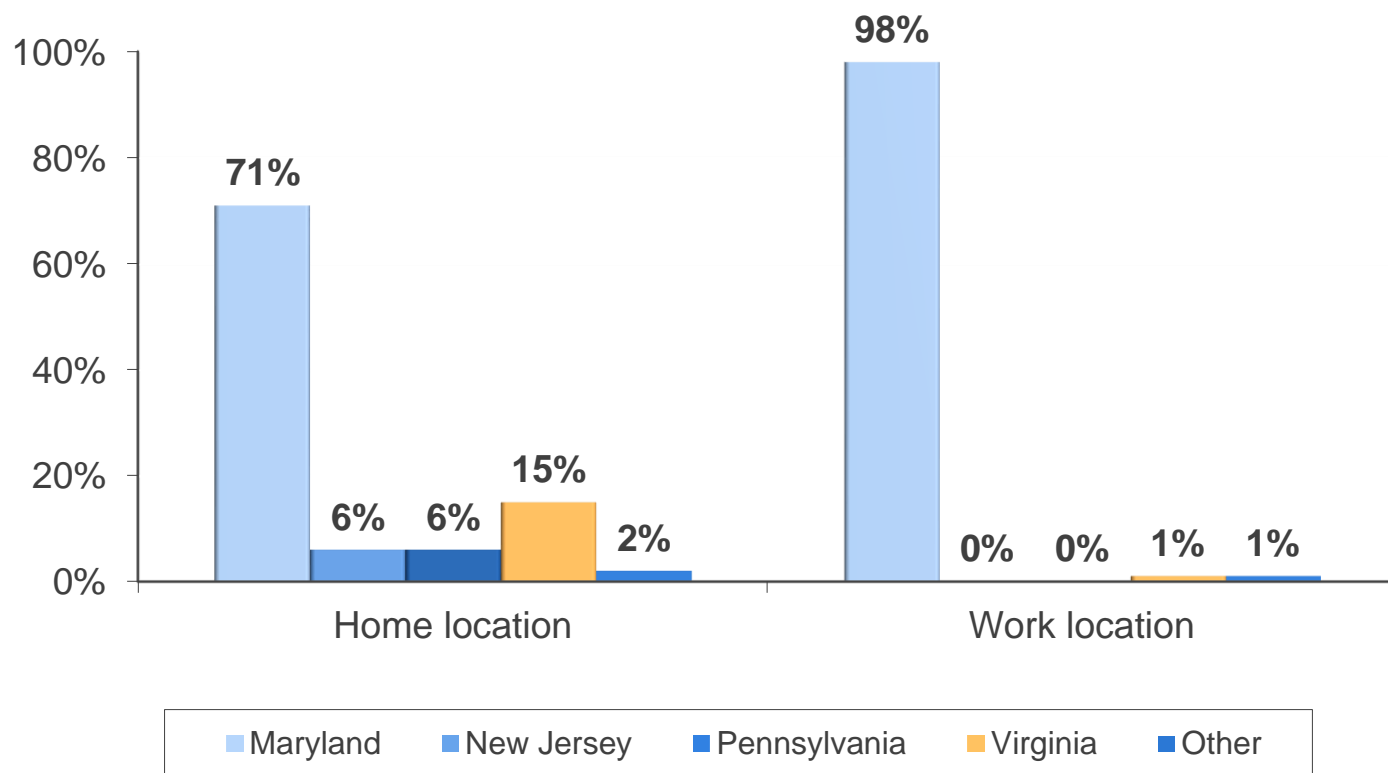


Demographics and Registration



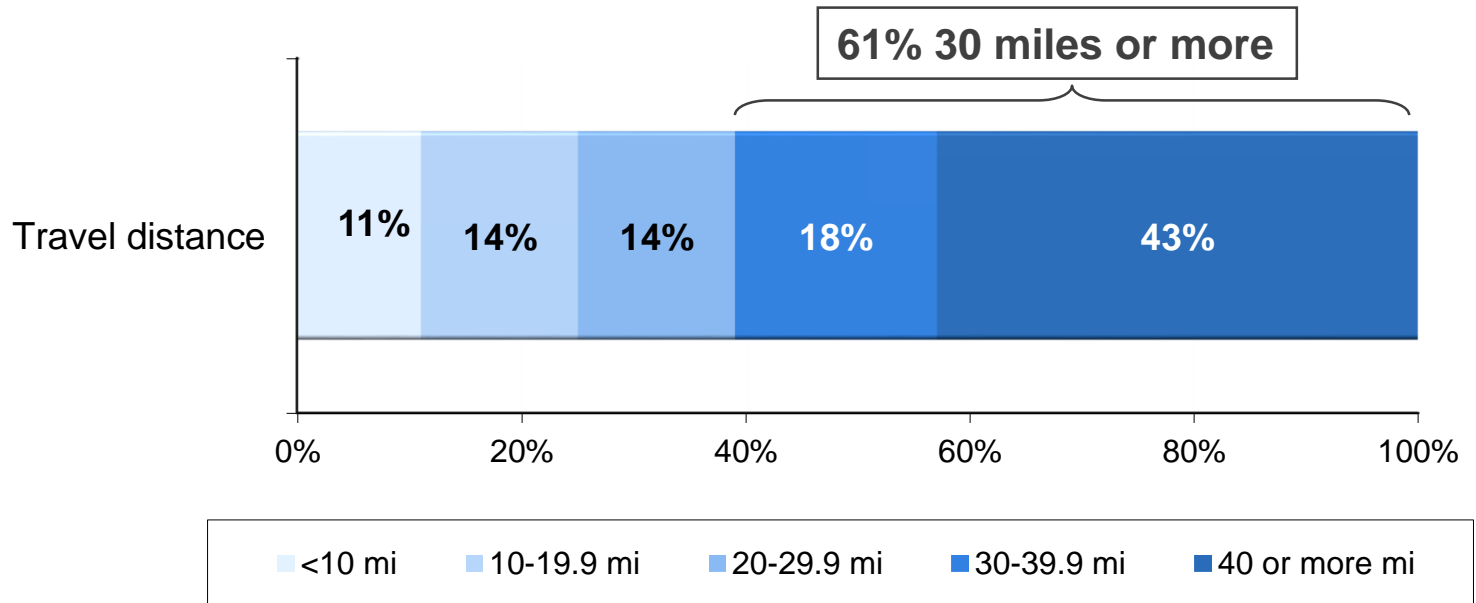
Seven in Ten GRH Registrants Lived in Maryland; Essentially all (96%) Worked in Maryland

Results were similar to 2013 – 72% lived in MD, 100% worked in MD



GRH Registrants Had Very Long Commutes

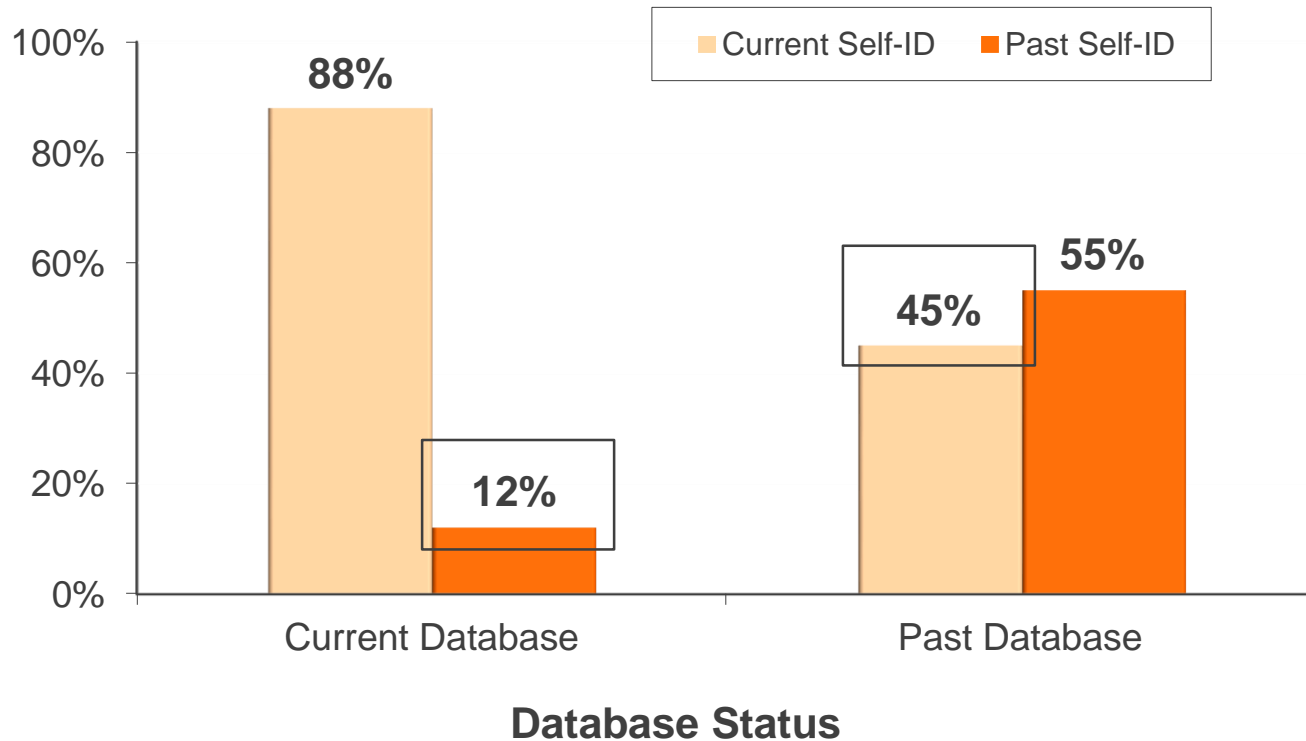
The average one-way distance for GRH participants was 35.3 miles; six in ten GRH participants traveled 30 or more miles



GRH registrants
n = 308

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

Most Current Participants Correctly Identified their GRH Status, but 45% of Past Registrants Thought they were Still Registered



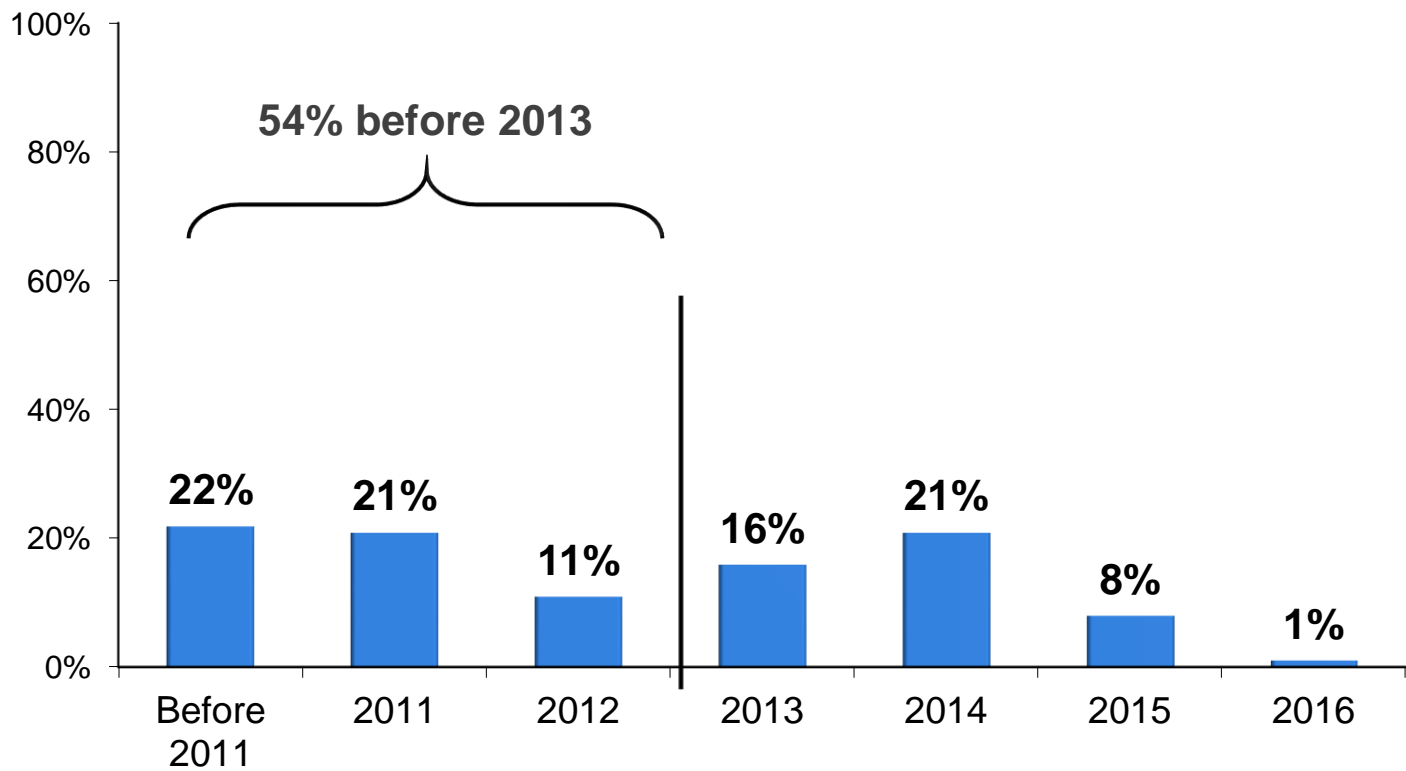
Database Status

Current
n = 163

Past
n = 166

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

About Half of GRH Participants Registered Before 2013; 22% Registered before 2011



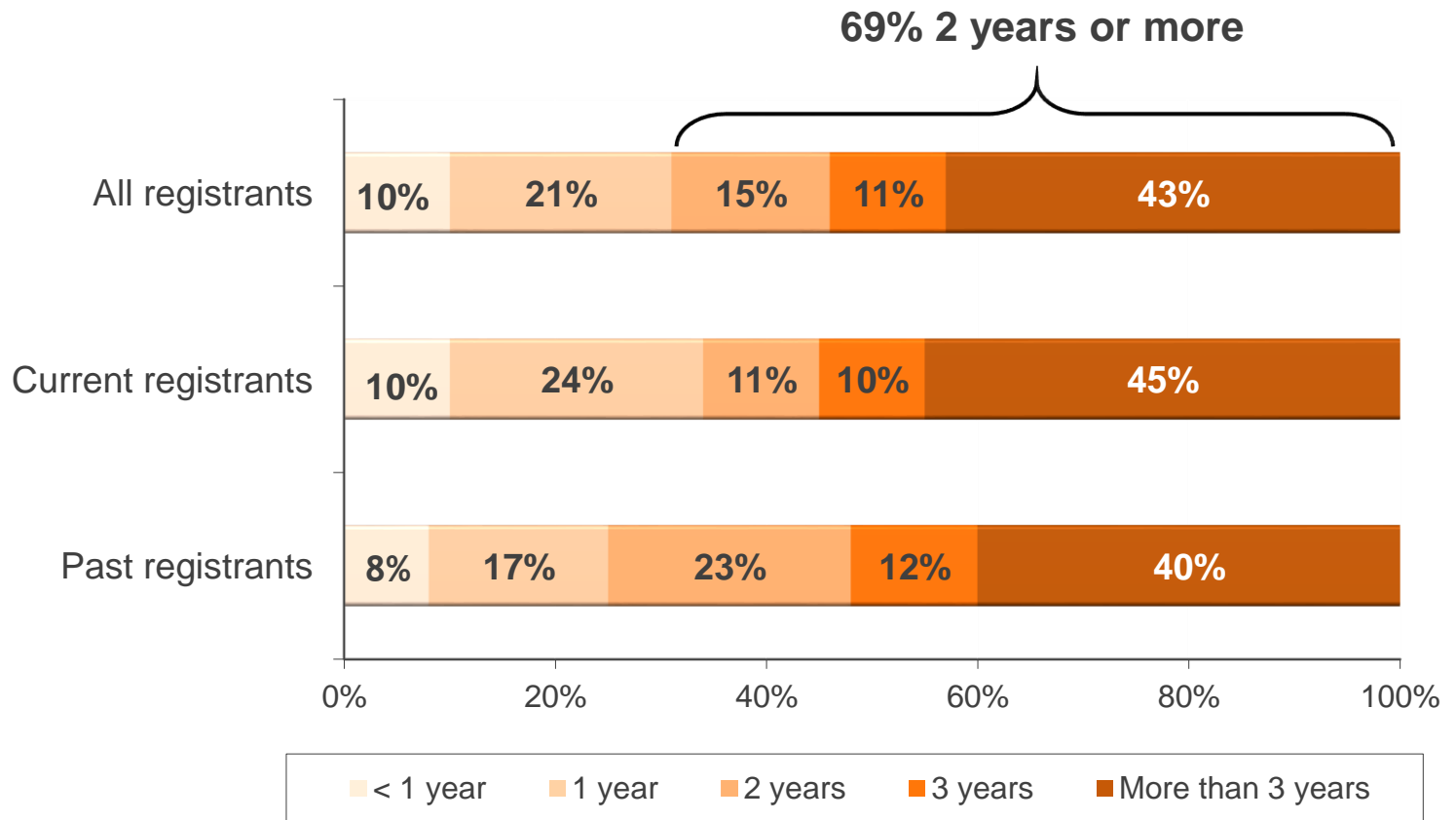
n = 284

Note: 45 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?

Seven in Ten Registrants Participated 2 or More Years

66% of current registrants had been participating for 2 or more years;
75% of past registrants participated this long



All registrants
n = 284

Current registrants
n = 196

Past registrants
n = 88

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

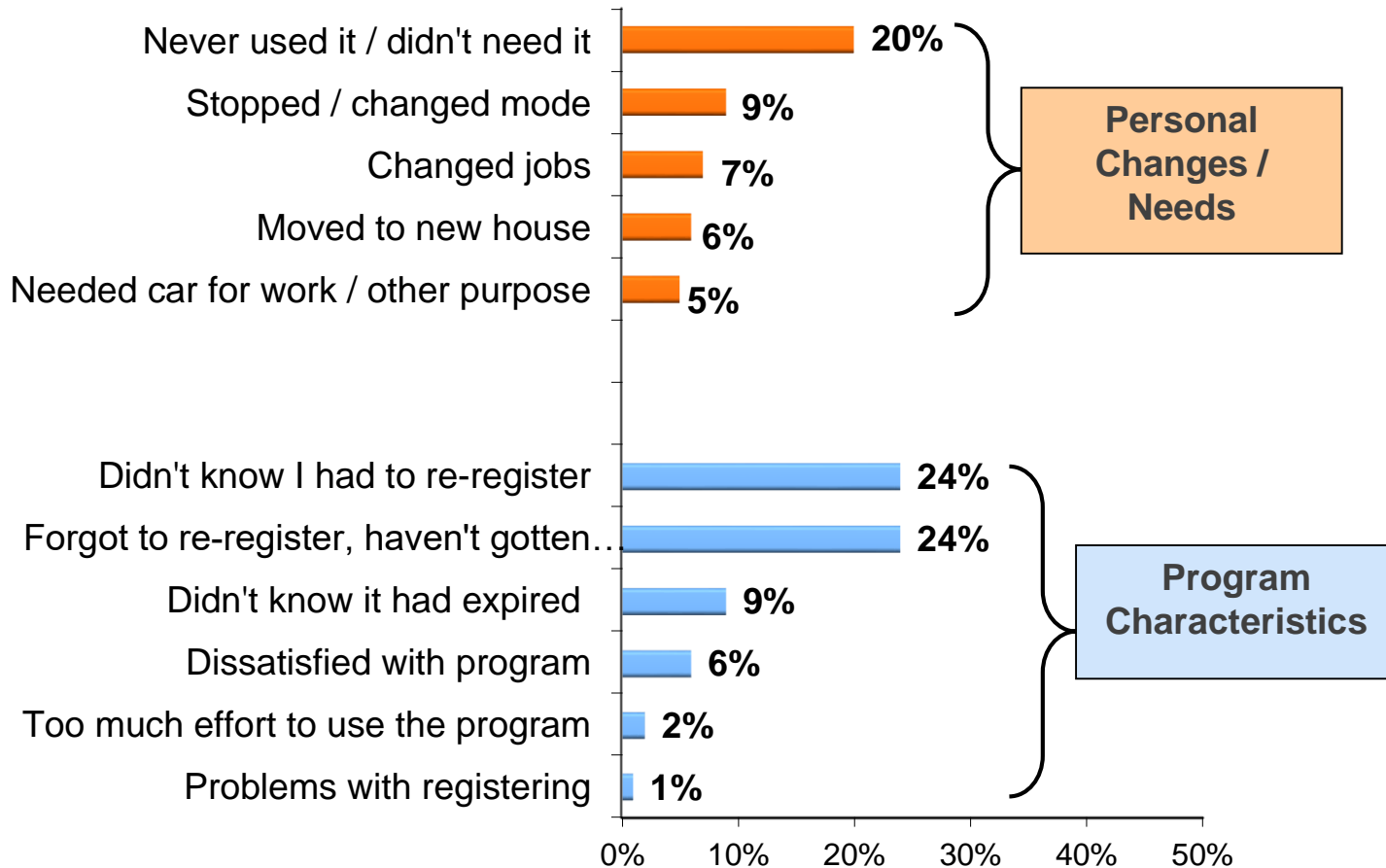
Q4 How long were you registered in the GRH program?

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

Reasons in 2016 were similar to 2013

2013 Survey

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

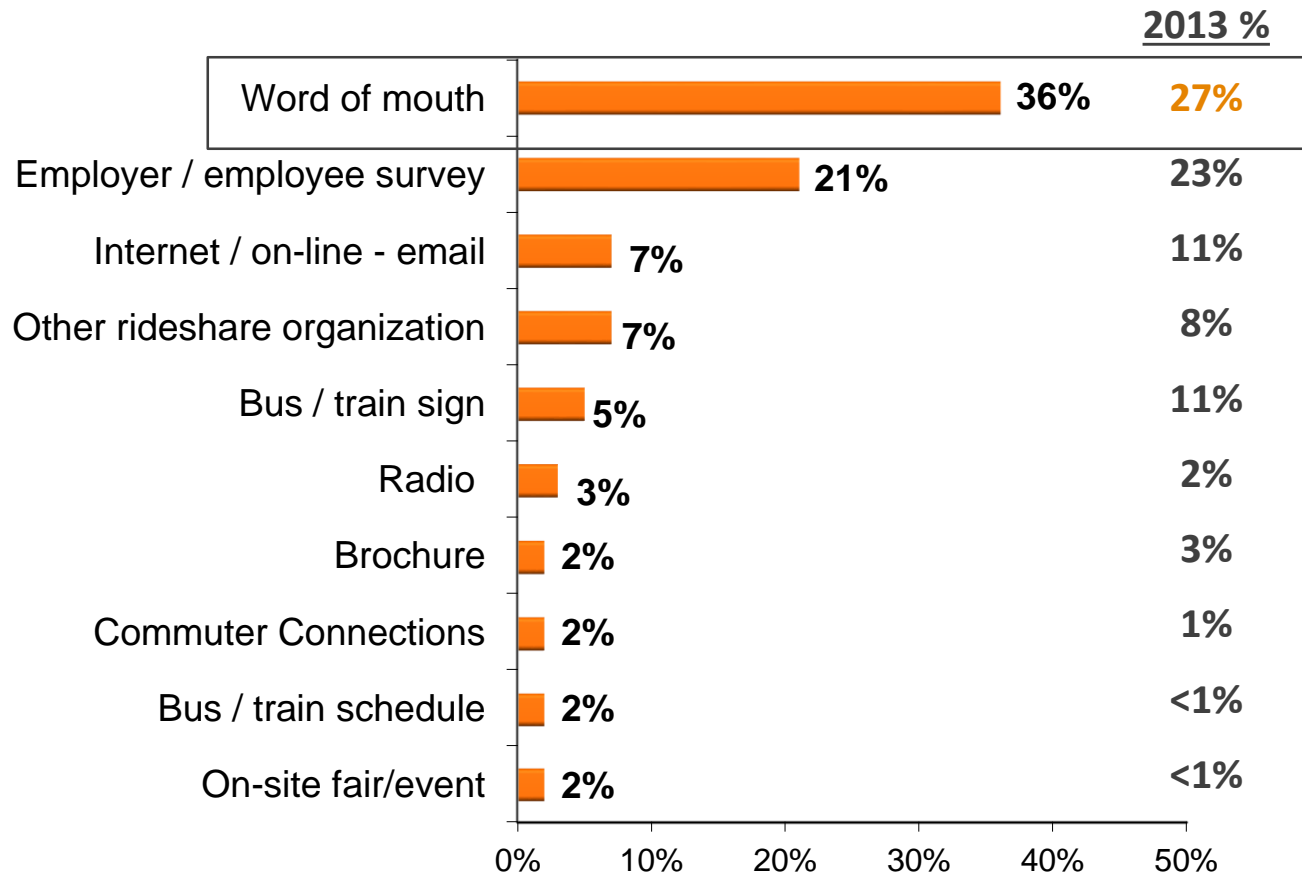


GRH Advertising Recall and Impact



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

Similar sources to those mentioned in the 2013 survey



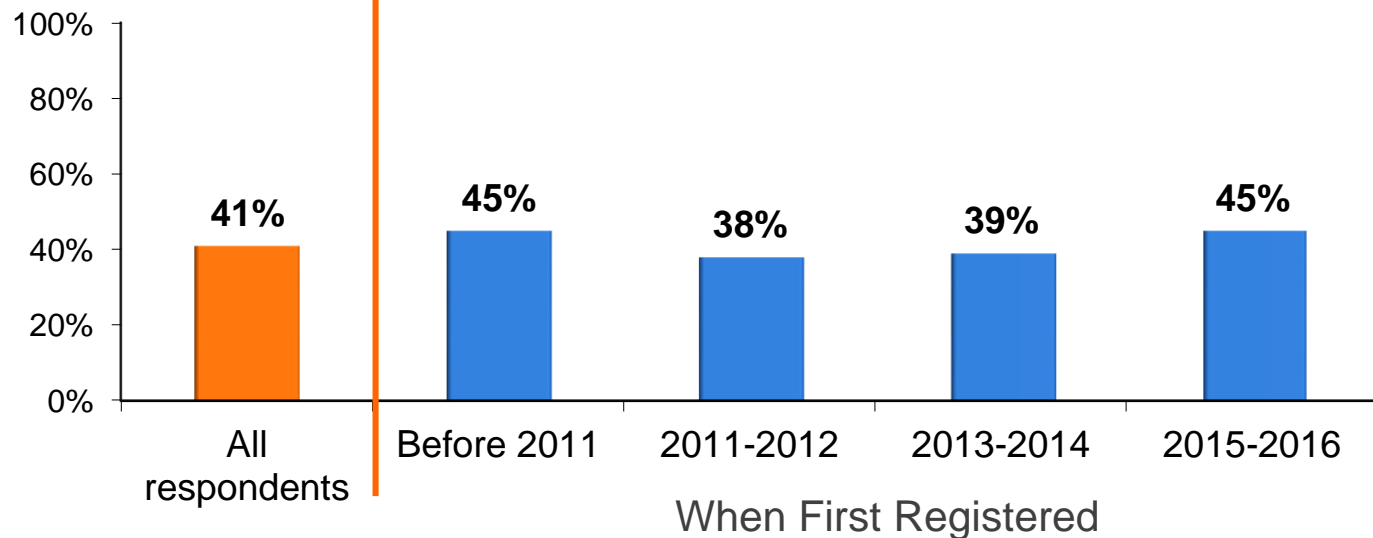
2016
n = 329

2013
n = 120

Q49 How did you hear about the GRH Program?

41% of All Participants Heard or Saw GRH Ads

Respondents who registered before 2011 and those who registered in 2015-2016 were more likely to have seen or heard GRH ads – 45% recalled ads, compared to about 38-39% of respondents who registered between 2011 and 2014



All Respondents
n = 284

Before 2011
n = 62

2011-2012
n = 83

2013-2014
n = 105

2015-2016
n = 34

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

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

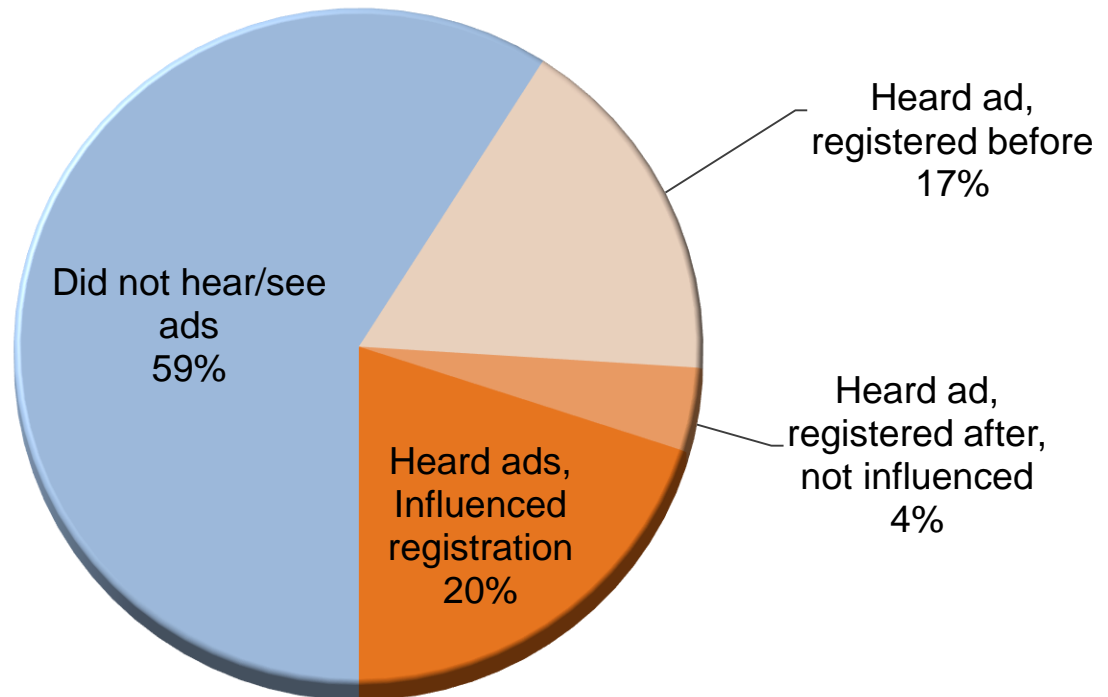
Other participants did not hear ads (59%), registered before they heard the ads (17%), or heard the ads but were not influenced by the ad (4%)

**2013
Baltimore**

**Heard Ads /
Influenced
registration**

24%

(n = 543)



n = 329

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?

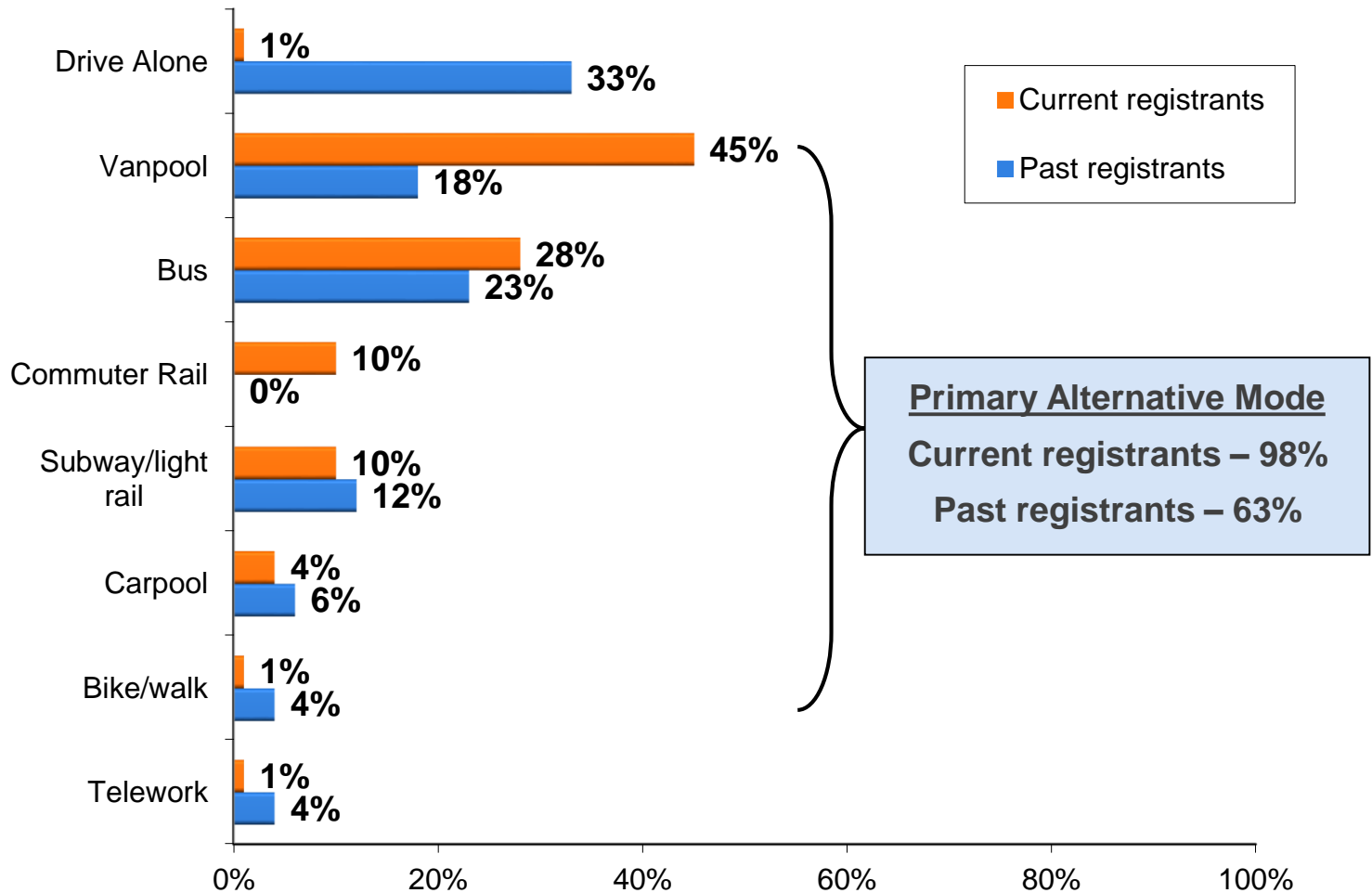


GRH Commute Patterns and Changes



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

63% of PAST registrants also used alt modes, similar to 2013 (59%)



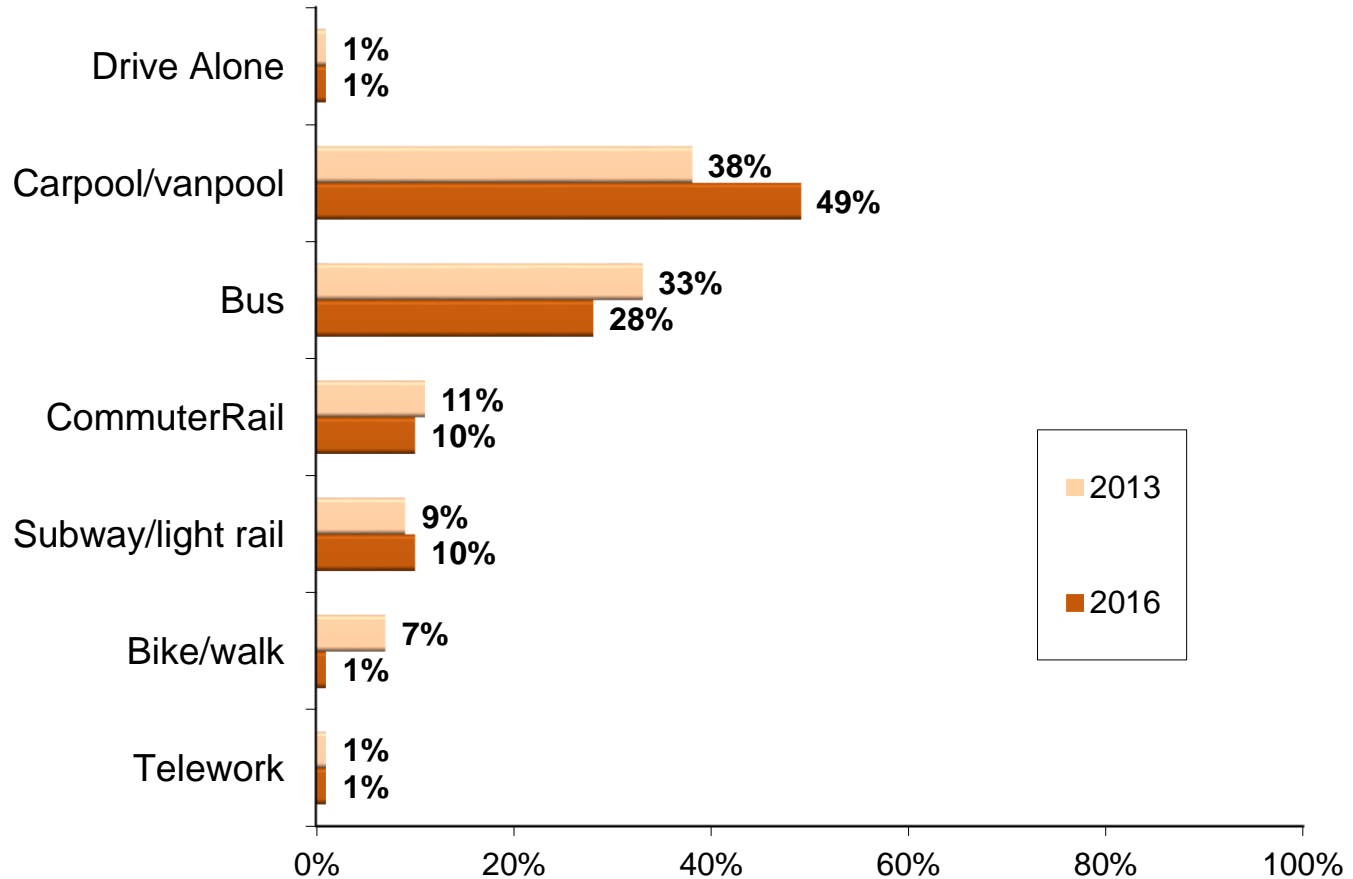
Current registrants
n = 223

Past registrants
n = 106

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

Carpool/Vanpool Accounted for a Larger Share of Current Registrants' 2016 Mode Use vs 2013

Bus share and bike/walk share declined since 2013



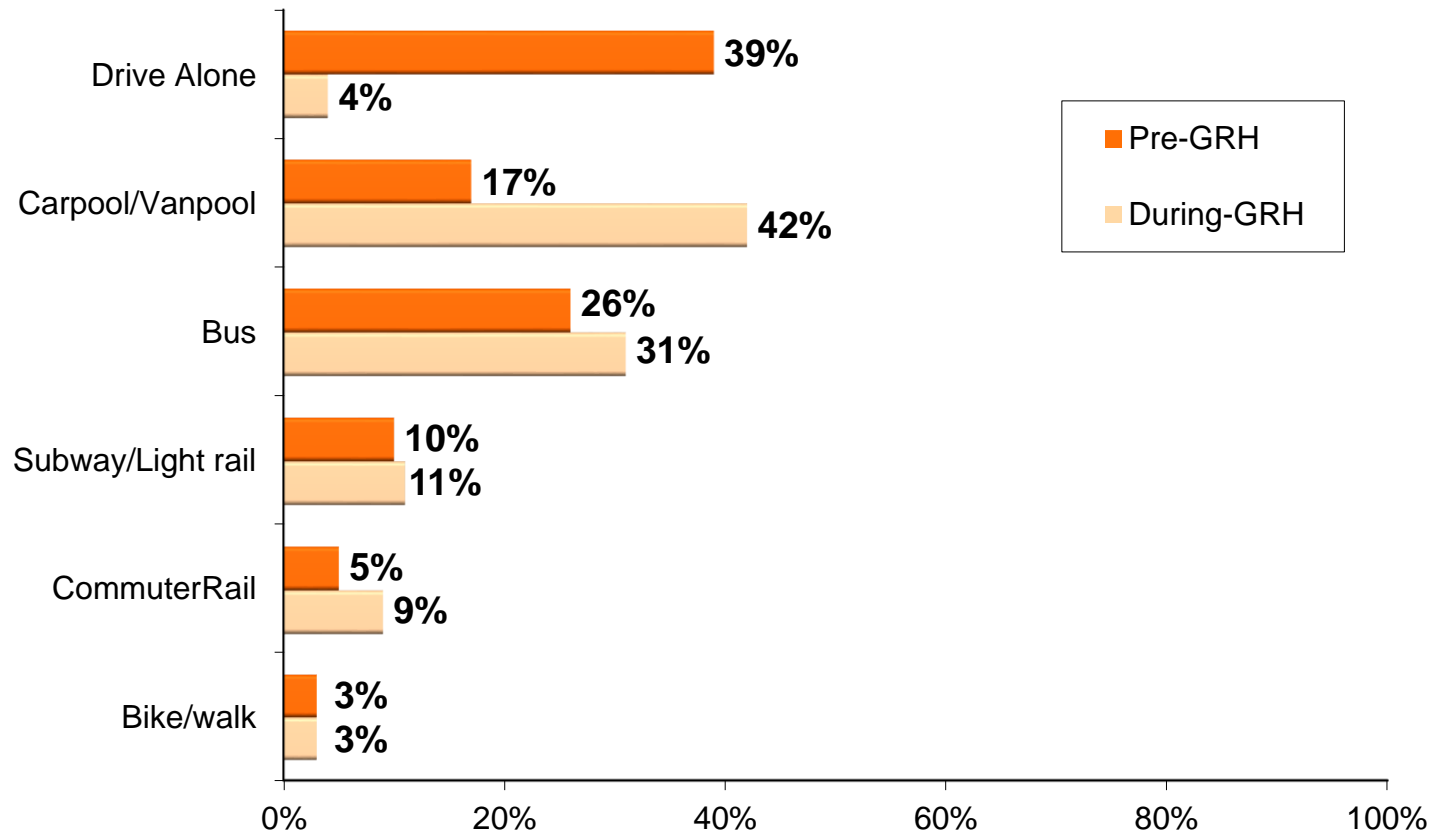
2013
n = 534

2016
n = 329

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

39% Drove Alone Pre-GRH; 4% Drove Alone During-GRH; Mode Shares for Most Alt Modes Increased

CP/VP increased from 17% to 42%, bus use rose from 26% to 31%, and commuter rail grew from 5% to 9%



During GRH
n = 329

Pre GRH
n = 318

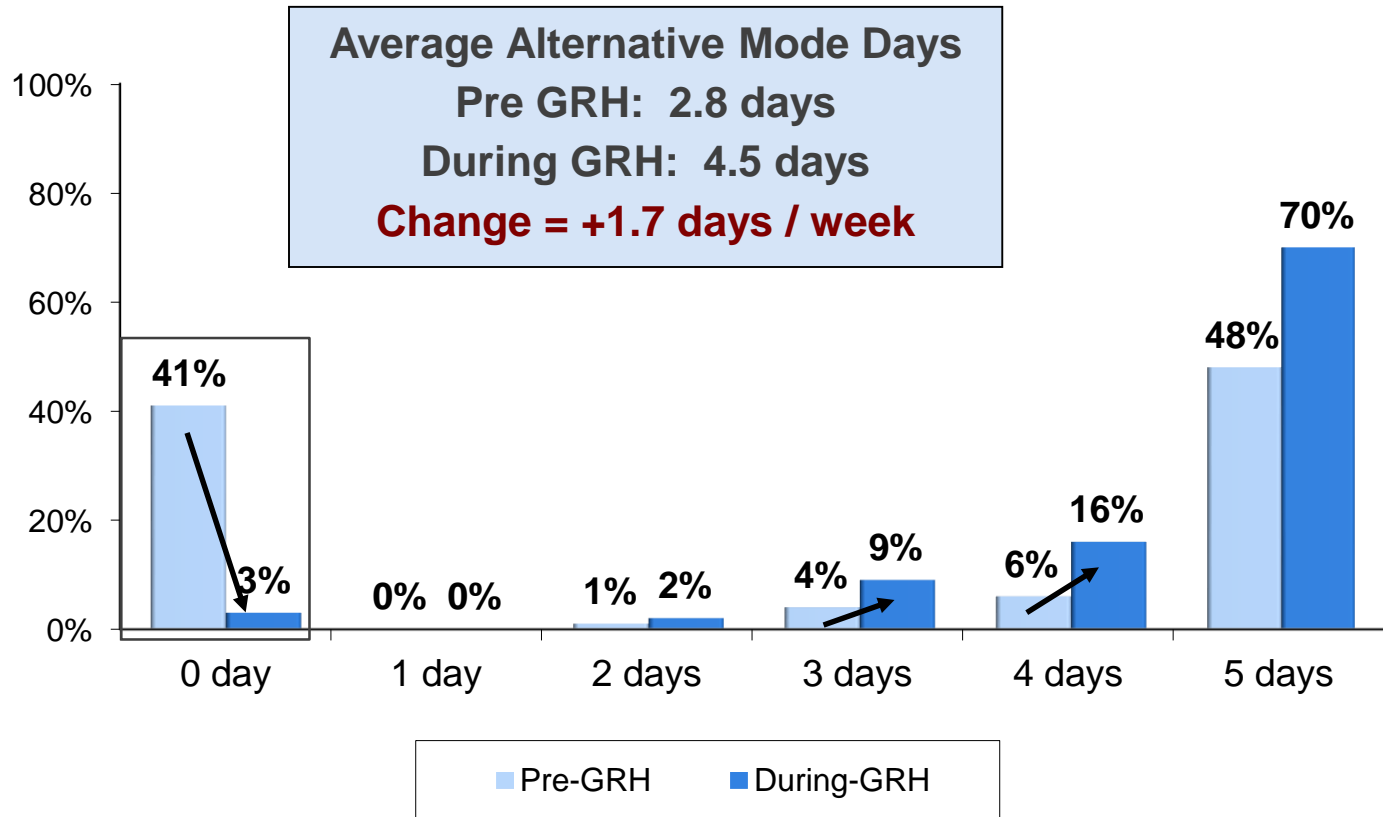
Chart excludes
telework primary
mode

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 2.8 Days per Week to 4.5 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 = 329

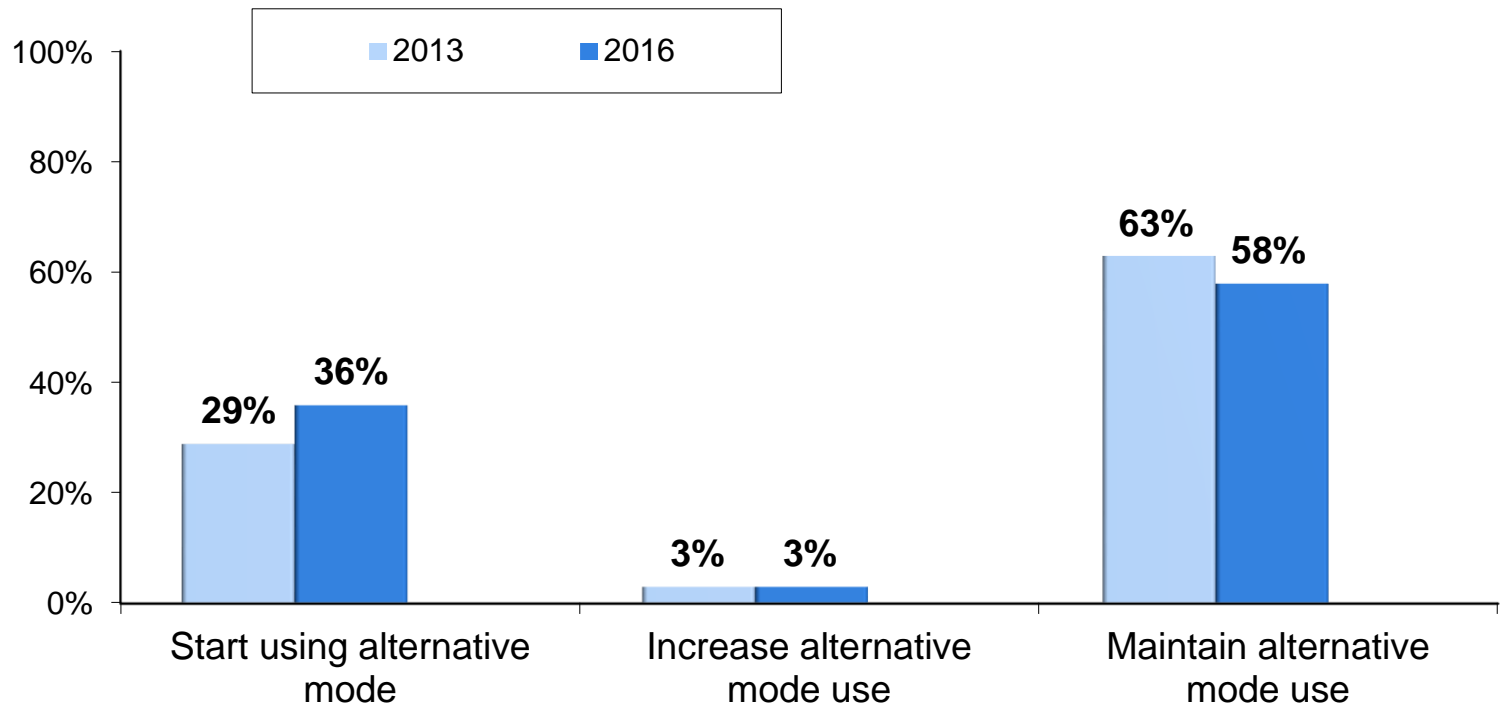
Pre GRH
n = 318

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, 36% of GRH Registrants Shifted from Driving Alone to Alternative Modes; 3% Increased Alternative Mode Use After Joining

The 2016 change from drive alone (36%) was higher than in 2013 (29%)



2013
n = 530

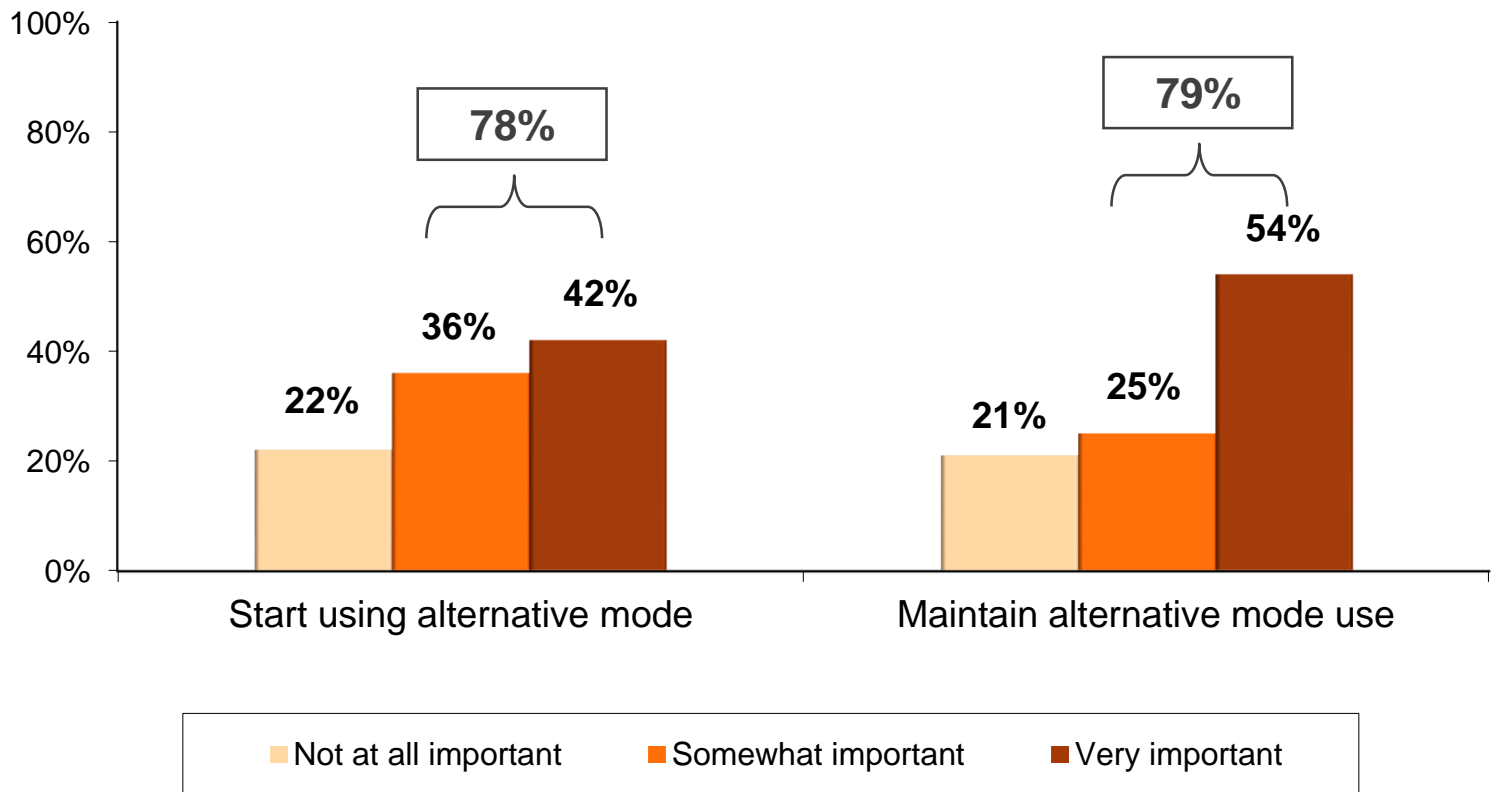
2016
n = 318

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

GRH seemed equally important to respondents' decisions to maintain alternative mode use



Start alt mode
n = 120

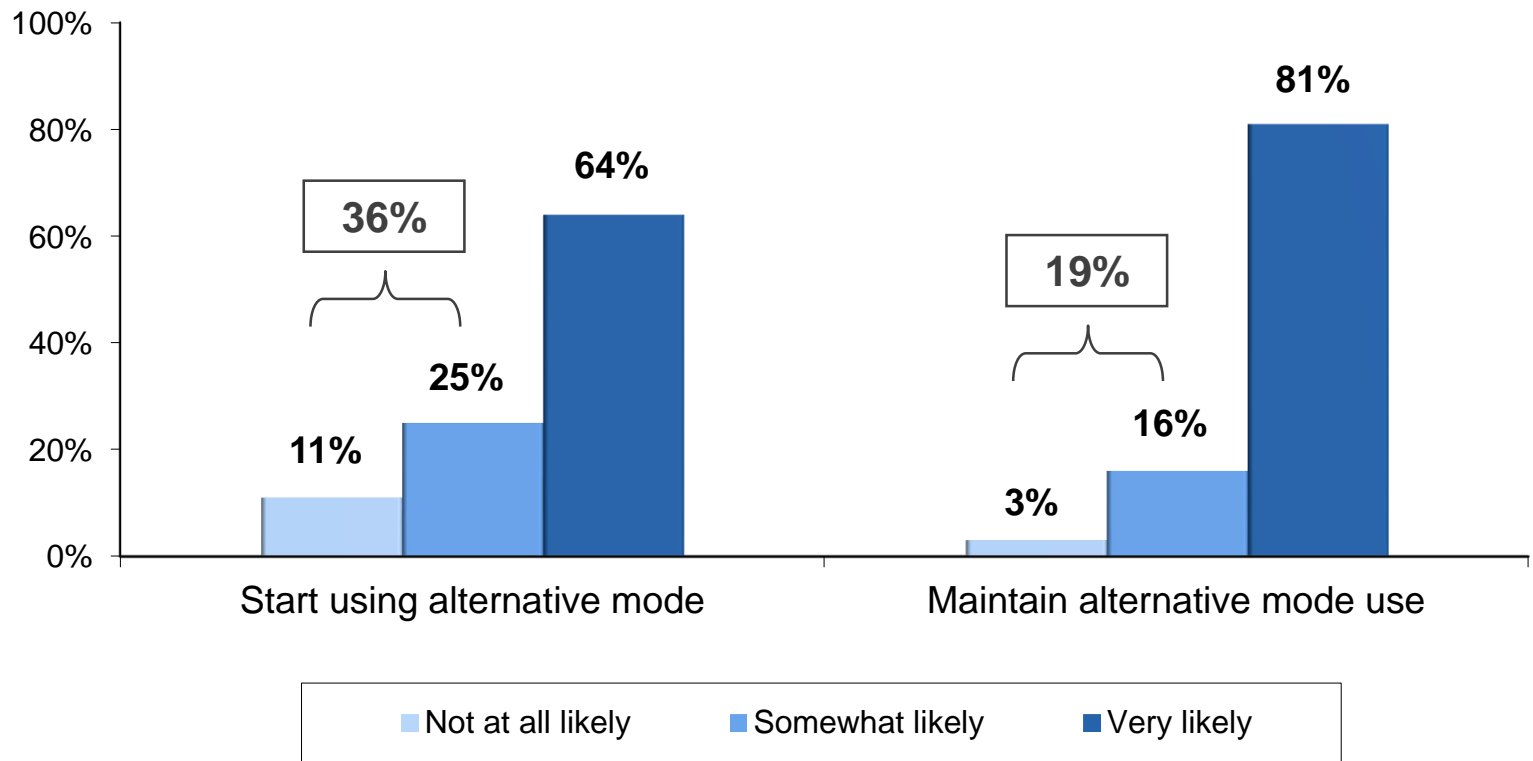
Maintain alt mode
n = 151

Increase alt mode
not show due to
very small sample
size (n=10)

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

About One-third of Respondents who Started Using Alternative Modes Were Not Likely/Only Somewhat Likely to Switch without GRH

GRH was less valuable to maintaining use of existing alt mode; 19% were not likely or only somewhat likely



Start alt mode
n = 119

Maintain alt mode
n = 149

Increase alt mode
not show due to
very small sample
size (n=10)

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

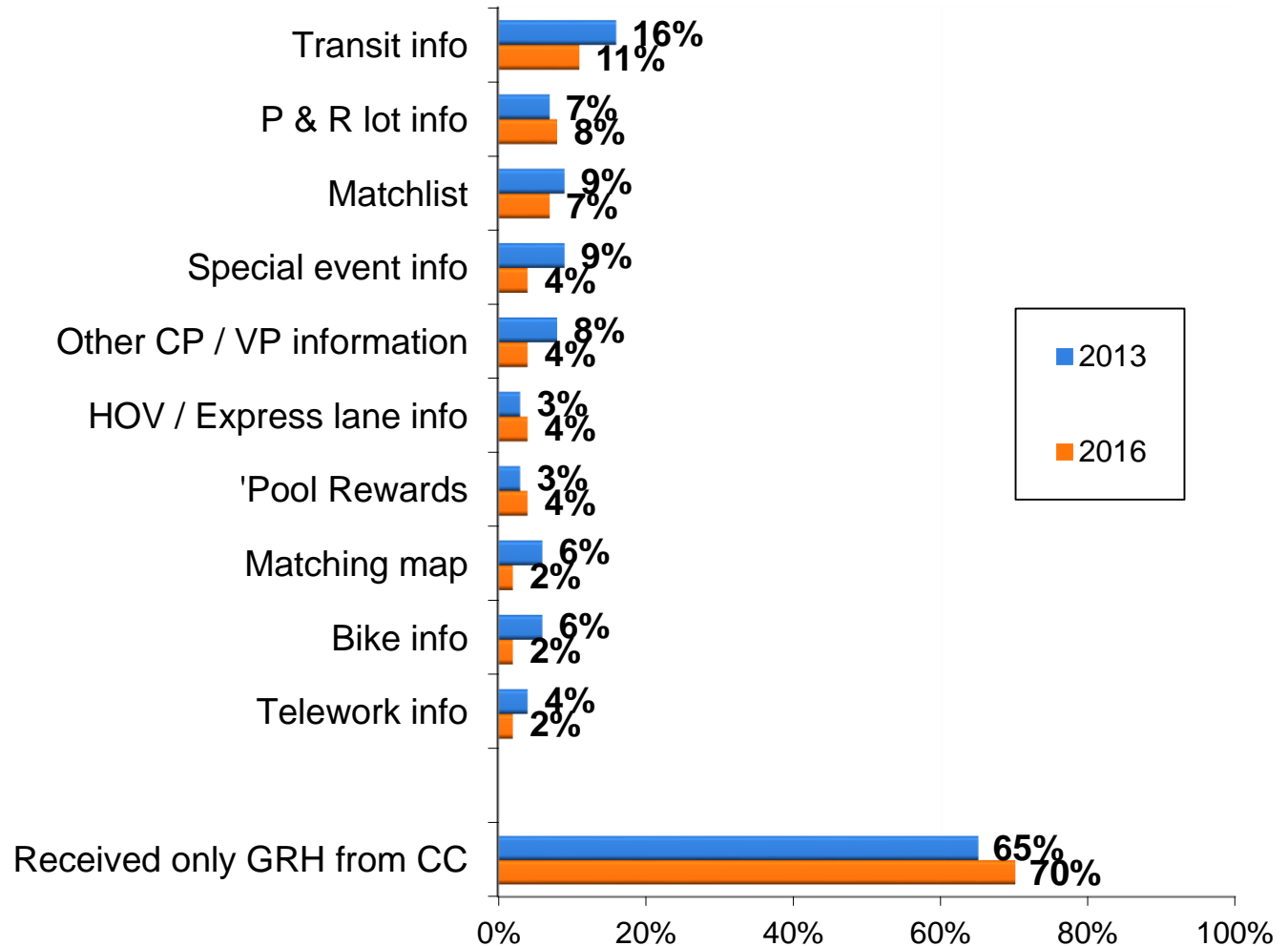
30% of GRH Registrants Received Other CC Services

Most common – transit info, P&R info, matchlist

GRH was the most important service

in their mode choice decisions:

- 25% who started alt modes
- 17% who maintained alt mode use

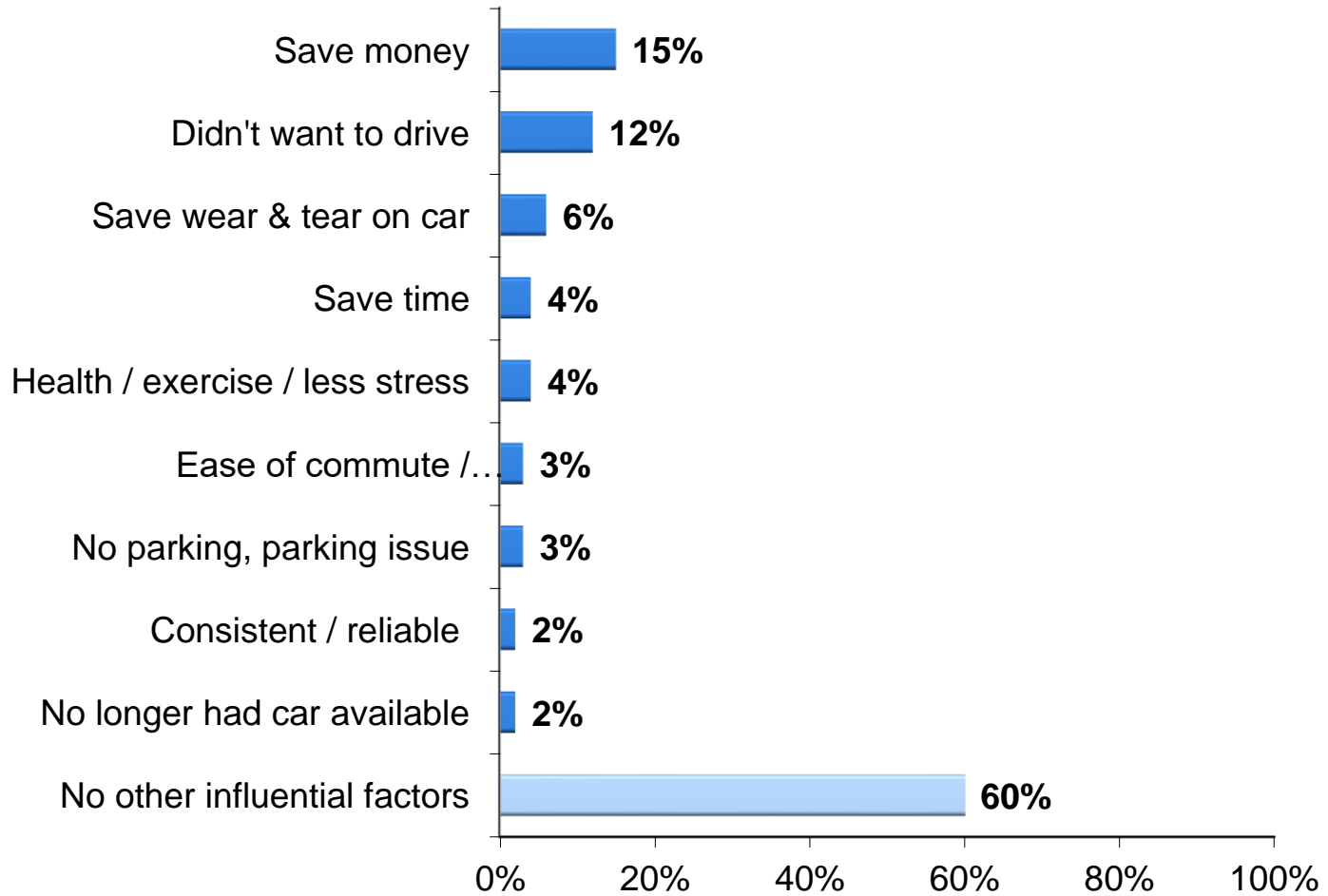


2013
n = 543

2016
n = 329

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

40% of Respondents Also Cited Non-Service Factors that Influenced their Decisions



n = 329,
multiple responses
permitted

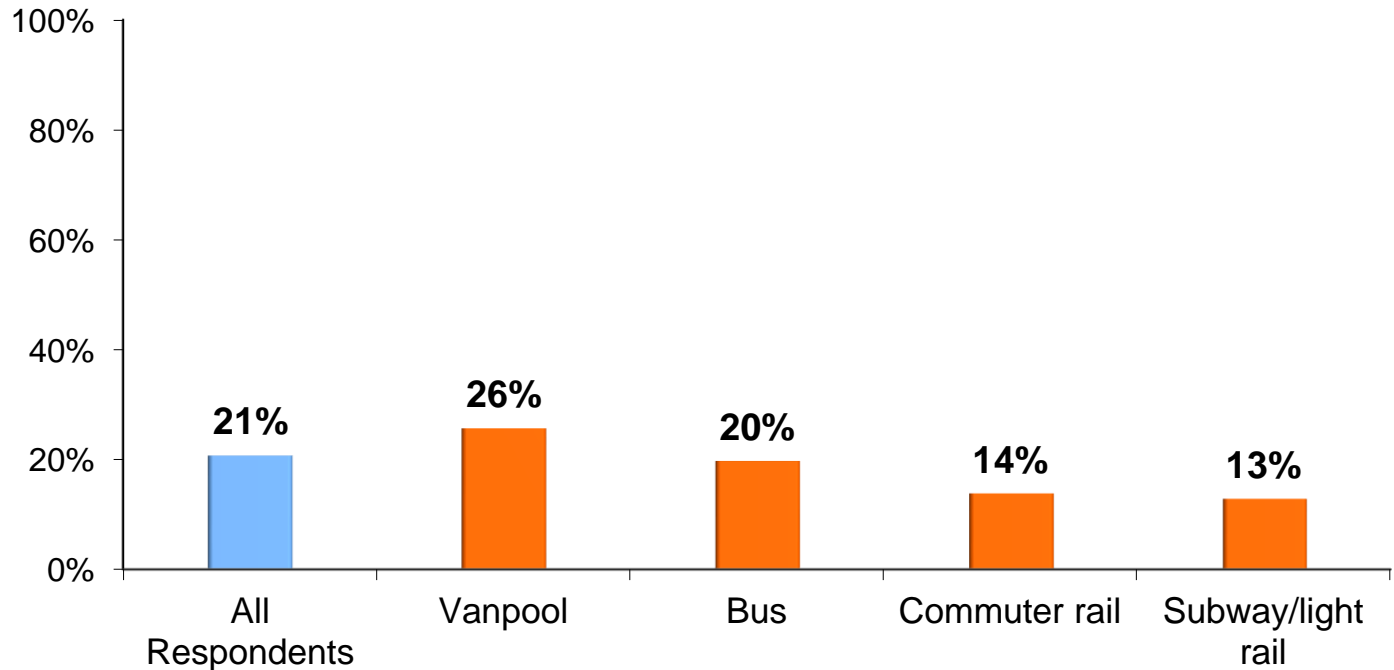
Q48 What other factors or circumstances were important to your decision?



Use and Satisfaction

Two in ten GRH Registrants Made a Trip

Vanpoolers and bus riders were more likely to have used a GRH trip than were commuter rail and subway/light rail riders



All respondents
n = 329

Mode During GRH

Vanpool
n = 124

Bus
n = 103

Commuter rail
n = 30

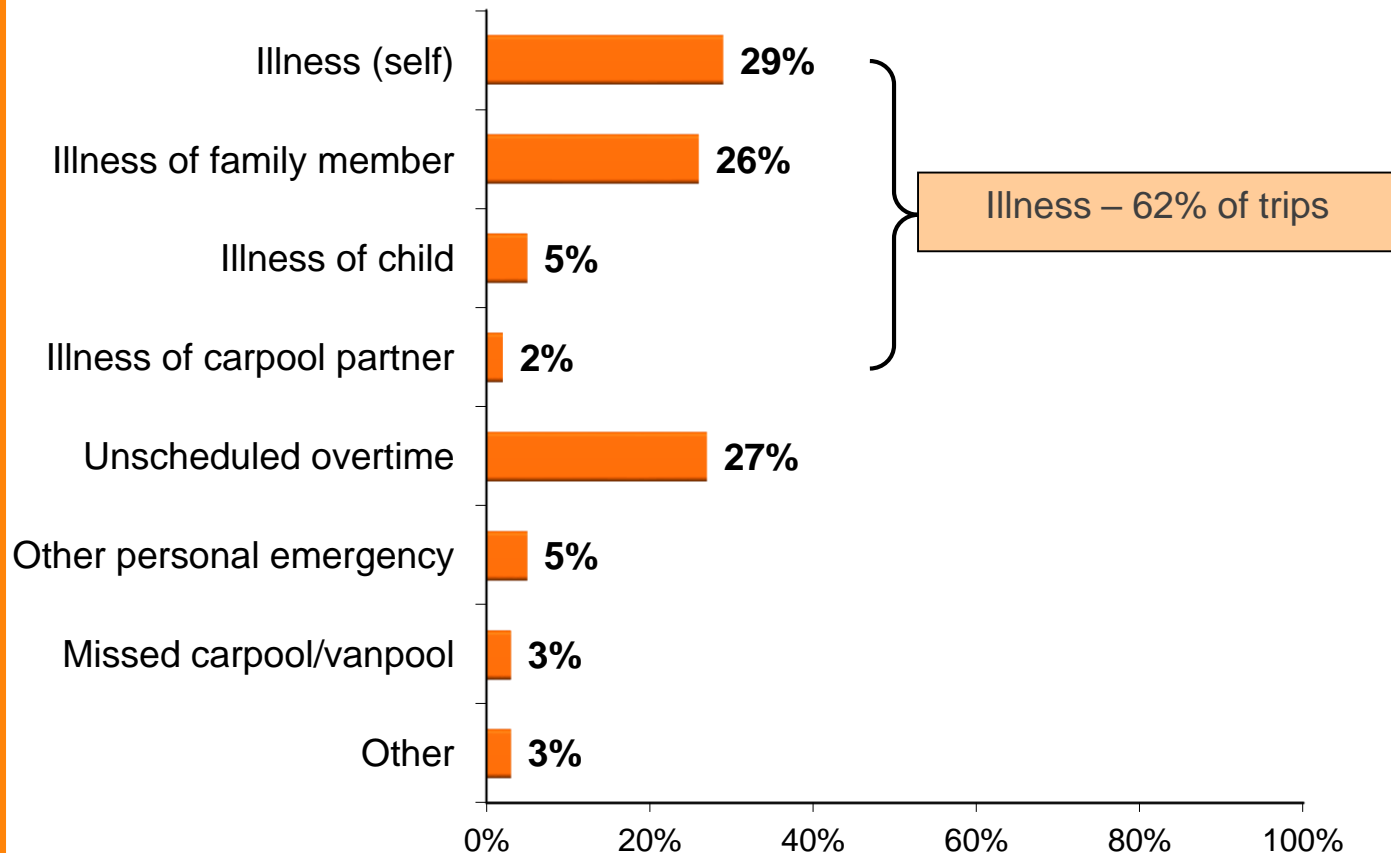
Subway/light rail
n = 32

Carpool and
bike/walk not
shown due to
small sample sizes

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

62% of GRH Trips were Taken To Address an Illness; 27% for Unscheduled Overtime

Respondents waited on average 28 minutes for the taxi to arrive; 88% of respondents who used a trip said they were satisfied





Questions?

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