# TDM EVALUATION GROUP
# MEETING NOTES
# June 18, 2013

1. Introduction
   *(Please see attached attendance sheet)*

2. 2013 State of the Commute Survey

   Nicholas Ramfos, COG/TPB staff, stated that the data collection activities for the 2013 State of the Commute Survey were completed and that high level results were available for review. Lori Diggins, LDA Consulting, presented a PowerPoint that gave the highlights of the survey results.

   Ms. Diggins began by reviewing the survey methodology for the survey. This is a triennial survey and a telephone survey of 6,335 randomly selected employed residents of the COG/TPB planning region. There were 575 surveys completed in 11 jurisdictions with a 95% confidence level of plus or minus 4.1%. 1,034 cell phone surveys were also completed to include cell phone only households. The jurisdiction level responses were expanded to the regional population of workers. The data were also weighted to adjust the sample for ethnicity and cell phone/landline availability.

   Ms. Diggins then covered the overall SOC survey topics which included continued tracking questions and new questions in the survey. In terms of commute patterns, work schedule arrangements in 2013 are very similar to the results from 2010. 66% of commuter work trips are made by driving alone, while 17% of weekly commute trips are made by transit, telework and compressed work schedules represent 8% of weekly trips. Overall, the drive alone rate dropped from 2001 to 20010 and there was a slight increase in 2013 from 64% to 66%. Telework has gained mode share since 2001 and other modes remained essentially unchanged. Ms. Diggins explained that fewer than half of "Inner Core" area commuters drive alone compared with 70% of commuters in the middle Ring and 74% of commuters in the

Outer Ring.  Commuters who work in the Core Area use transit at a much higher rate than do commuters who work in the middle ring or outer ring.  Core workers also bicycle or walk and carpool or vanpool at a higher rate.

Drive alone has the highest use of being a "primary mode" but also a very high rate of less frequent or occasional mode.  Transit and rideshare users are more likely to use those modes more frequently. Commuters who drive alone or ride a train have used these modes longer than other commuters and it's about nine to ten years on average.  More than half of commuters who ride a bus, bicycle/walk, or carpool to work have used these modes for less than five years.

Those that have been using alternatives modes for less than two years drove alone (34%) and shifted from another alternative mode (35%). 31% of those using alternative modes for less than two years were using their current mode or did not live in the region prior to this time period.  19% of survey respondents who commute by using an alternative mode started using the modes primarily because they changed jobs or their work hours; 10% had moved to a new residence and 6% stated that their worksite had moved.   16% stated they wanted to save money and 12% stated they wanted to save time.  The breakdown of reasons was also classified by alternative mode.  For example, 16% of Metrorail riders were looking to save time, 19% of carpoolers were looking to save money, 23% of commuter rail riders were looking to avoid congestion and 21% were looking to save time. 55% of bicyclists were looking to save money and 53% were looking to save time; 18% of walkers were close to work and 43% changed jobs, and 27% of bus riders had no vehicle.

The average travel distance did decrease a bit from 16.3 miles in 2010 to 16 miles in 2013.  However, the average travel time was the same as it has in the past six years.  About a third of respondents traveled 20 minutes or less to work and about one in ten traveled 60 minutes or less.

Next, Ms. Diggins covered the major DC/Maryland roads used.  In the North/Northeast area heading into DC, 12% used the Capital Beltway and 8% used I-270.  3% used Rockville Pike.  In the

East/Southeast area, 5% used I- 295 and 5% used Route 4 (Pennsylvania Avenue) and 3% were using Route 50.

In Virginia, from the South/Southwest areas going into DC, 100% of the respondents were using the Capital Beltway and 9% used I-395, while 6% used I-95. From the West/Northwest part of Virginia, 6% were using I-66 inside the Beltway and 5% used I-66 outside the Beltway, while 5% used Route 50.

Next, Ms. Diggins covered the telework results. The growth rate continued but it only grew by 2% which is much smaller than in previous surveys. The federal government had the most dramatic rate of increase from 27% to 38%; the non-profit employer rate was about the same; however the private sector rate dropped from 28% to 25%. State and local government's telework rates stayed the same. There are 470,000 non-telework commuters who have job responsibilities that could be performed through telework and would like to telework. The frequency of telework has gone up to .4 days of work on average. The share has gone from 48% to 57% for one or more days per week. Three in 10 workers stated that their employer has a formal telwork program and about half said that the employer does not allow telework. Six in ten workers telework under a formal program. One in ten teleworkers received telework information from Commuter Connections; this is up from the 2010 survey.

Next, Ms. Diggins covered travel facility survey results. She stated that 50% of survey respondents live less than one-half mile from a bus stop and 65% live less than a mile. Train station access is less convenient and only 17% of respondent's live less than one mile from a train station. 84% of core area respondents live less than a half a mile from a bus stop. In the middle ring 53% have a bus stop within 1/2 mile and only 15% of Outer Ring respondents have close bus access. Ms. Diggins explained that there is an increase in the drive alone rate and a decrease in transit use as the distance from home to bus stop increases. Three in ten commuters said that there was an HOV lane and/or Express lane along their route to work. One third of these commuters used the lanes and half (50%) of HOV users said availability of the HOV lane influenced their decision to use an alternative mode. 5% of those stated that they use an HOV lane and it influenced their travel decision. Middle ring and outer ring commuters are more likely than core are commuters to have HOV/Express Lane availability and outer ring commuters use HOV/Express lanes at a very high rate when they are available.

In 2013, 17% of commuters reported n easier commute than a year ago compared with 12% of commuters in 2010. 64% of commuters are satisfied with their commute which is about the same as in 2010. 44% of respondents are satisfied with transportation options and 26% are unsatisfied. Generally, commuters are less satisfied with transportation in the region. The societal and personal benefits were then covered and 81% of respondents cited societal benefits from ridesharing. There was a 1% increase from the 2010 survey in saving energy as one of the reasons. 90% of those who rideshare cite personal benefits of ridesharing which is the same share as in 2010. More respondents in 2013 stated that they were avoiding stress, arriving on time and getting exercise, while fewer stated that there were cost savings or environmental benefits. Four in ten commuters who use alternative modes perform work related tasks during their commute at least some days.

Next, Ms. Diggins covered ad awareness. 55% of respondents recalled hearing/seeing commute ads in the past year which is about the same as in 2010. 67% of respondents could name a specific message. Most cited general rideshare/transit messages or messages about alternative mode use; 5% mentioned GRH and 4% said they contacted Commuter Connections. 7% of respondents who recalled messages took an action to try to change their commute. 3% tried or started and alternative mode for their commute.

Next, Ms. Diggins covered regional and local commute services. 62% of respondents said there is a telephone number or website for commute information. Awareness of regional commute information resources fell slightly since 2010, but it is still higher than in 2007. 25% of respondents could name a specific number or web site, the same share as in 2010. 16% named WMATA's number/website, 3% named a Commuter Connections number/web site and 2% named a Commuter Connections partner number/website. 62% of regional employees know of Commuter Connections which is a slight decline from 2010. 23% of all respondents knew that there was a regional GRH program which is less than in 2010. More than a third

Commuters expressed interest in instant carpooling and more did so as a passenger versus a driver even though they would be asked to pay 20 cents per mile of travel.  Awareness of local services ranged from 11% to 56% and the use ranged from 1% to 18%.  The use of local services was generally higher for those in the outer jurisdictions and the use was higher for those programs associated with transit agencies.

The last section Ms. Diggins covered was on Employer Services. 57% of respondents who are not self-employed said their employers offer commute incentives or support services.  This was a slight drop from the 61% of availability in 2010, possibly due to the economy and cost-cutting.  The most widely available service in 2013 is a transit/vanpool subsidy but fewer respondents had this subsidy than in 2010 and availability of other services was about the same.  The most widely used employer service is also the transit/vanpool subsidy which was used 57% of respondents with access to the service.  34% of respondents with access had used travel option information; other services used by two in ten with access.

A summary of top survey findings were also included in the presentation.  A technical report will be produced in draft format and will be presented at the July Commuter Connections Subcommittee meeting.

3. 2013 Guaranteed Ride Home Applicant Surveys

   Ms. Diggins stated that the data collection efforts for the Washington DC region GRH Applicant survey was completed and that the Baltimore data collection is still going on and phone calls are being made to reach 500 completed responses.  To date there have been 436 responses for the GRH Baltimore survey.  Overall highlights from both surveys will be presented at the July Commuter Connections Subcommittee meeting.

4. FY 2014 Regional TERM Analysis Data Collection Activities

   Mr. Ramfos reviewed the data collection activities from the FY 2014 CCWP.  The 2013 SOC Technical Report will be prepared along with the general public report for printing. The final 2013 GRH Applicant Survey reports for both DC and Baltimore will be prepared and released. The Employer Outreach database will be evaluated and a Bike to Work Day survey of 2013 event participants will be conducted and a report will be prepared and released. Data collection will also occur for those employers in Maryland with Telework programs. A draft TERM Analysis report will also be prepared and as part of the program monitoring and tracking project an Employer Outreach Customer satisfaction survey will be conducted by COG/TPPB staff with some assistance from a survey research firm. Mr. Ramfos stated that a detailed calendar with milestones will be prepared and distributed to the group during the next scheduled meeting which will be in the fall.

5. Capital Bikeshare Survey Results

Ms. Diggins gave an overview of Capital Bikeshare survey conducted. The purpose of the survey was to examine characteristics of Capital Bikeshare members, their bikeshare trips, travel changes in response to bikeshare and auto ownership/use changes with bikeshare. The survey was sent to 11,100 registered members and there was a 34% response rate.

Capital Bikeshare members are younger, more likely to be male, white, highly educated, slightly less affluent and less likely to have a vehicle regularly available.

Members averaged 8.6 bikeshare trips in the last month and 37% made one to five trips and 35% made 11% or more trips. Most members used bikesharing most often for non-work trips, but nearly six in ten used bikeshare to get to or from work. More than half of members used bikeshare at least once in the past month to access Metrorail. The most common recent trip purpose was to go to work, but is a less common purpose overall. This suggests work trips are made more frequently, but are concentrated among smaller number of members. Capital Bikeshare was chosen for most trips primarily because the bicycle was faster/easier to use. 40% of Capital Bikeshare members made an induced trip in the past month and most induced trips are non-work related and are distributed in proportion to overall non-work trip use. Capital bikeshare members used most induced trips because the destination was too far to walk. This suggests members might have substituted trips to distant locations for trips they would have made closer to home.

Capital bikeshare members were also asked if they made changes in aspects of travel. 27% of members said they increased their bicycle use since joining Capital Bikeshare. A large share of members reduced car use, also use of transit, walk and taxi use. This indicates likely shifts to bike from all modes. 5% of members reduced their household vehicles and 7% considered doing so. 26% of members who reported both pre-bikeshare and with-bikeshare mileage reduced annual driving miles. On average, Capital Bikeshare members reduced 198 driving miles per year. Capital Bikeshare members reduced 4.4 million driving miles per year compared with their pre-capital bikeshare mileage.

Next, Ms. Diggins covered commute patterns and commute changes. Only 12% of bikeshare members drive alone to work which is well below the 65% regional average. 41% primarily use transit and 30% primarily bicycle. 57% of members reported a commute change, but change was observed for only 38%. Some changes could have been temporary, but it's likely some changes were for access modes rather than primary modes. Bike and walk changes were least likely to be observed. Overall 38% of members made a continued commute change. 25% made their most significant change to bike.

Capital Bikeshare members collectively reduced more than 2.1 million Vehicle Miles of Travel annually from commute changes. 63% of employed members used Capital Bikeshare at least once in the past month for a work-related trip and 19% made 11 or more work related trips. Across all members, work-related trips accounted for about 42% of the total monthly trips. 55% of Capital Bikeshare members said their employers offer services to help them bicycle to work. They were twice as likely to have bike services than the average commuters in their work areas. Ms. Diggins explained that Capital Bikeshare members who have Bike Services use bike for commuting more (34%) than do members without bike services (27%).

The primary reasons individuals joined Capital Bikeshare included easier/faster travel, a new/one-way travel option, and liking to bicycle. Other reasons included fitness, saving money and helping the environment. Younger members were motivated by ease of getting around and saving money while older members were motivated by exercise, improving the environment and health. Capital Bikeshare members collectively save more than 17.7 million dollars annually on personal travel costs. On average this turns out to be about $15.39 a week or $800 per year per member. Convenience was the top factor of what members liked most about Capital Bikeshare. Ms. Diggins then showed some of the quotes from members about what they liked about the program. Members also cited many issues that are significant barriers to bicycling in the DC region including bike paths/lanes, auto drivers, roads and traffic, and bike services.

Finally, Ms. Diggins showed slides with the top findings from the Capital Bikeshare survey. Mr. Ramfos stated that the survey results will be used to incorporate the Capital Bikeshare employer based trip reduction strategy into the Employer Outreach TERM Levels of Participation. Staff will be reviewing the findings and making a recommendation to the Employer Outreach Committee.

**The next TDM Evaluation Group meeting is to be determined.**