MEMORANDUM

TO: Commuter Connection Subcommittee
FROM: incenTrip Rewards Work Group
DATE: Tuesday, May 21, 2019
RE: Customization Recommendations for the Summer Release of incenTrip

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BACKGROUND

Commuter Connections is partnering with the University of Maryland (UMD) to launch the much-anticipated *incenTrip* application for iOS and Android by the end of summer 2019. A major component of the incenTrip app are the incentives that may be earned by logging trips within the app. Commuters who are eco-conscious in their driving, rideshare, take transit, bike, or walk to work can accumulate points during their home and work commutes. These points may then be redeemed for enticing rewards. Actual incentives, the reward structure, and incentive fulfillment have yet to be determined – hence the creation of this work group.

The work group has been created to recommend a path forward regarding the following elements of incenTrip:

- Identify rewards that entice behavior change
- Determine an appropriate point accumulation structure
- Create an efficient reward distribution strategy

WORK GROUP VOLUNTEERS

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PART 1: PROPOSED PROGRAM GOAL

Encourage **commuters** to use **alternatives to driving alone** in a private automobile, including ridesharing (carpool and vanpool), transit, bicycling, and walking.

- This general goal, which is **mode-agnostic** (apart from SOVs), is consistent with Commuter Connections programming as it is lifted straight from the FY2020 Commuter Connections Work Program (CCWP, pg. 6).
- Commuting remains the primary focus; off-peak travel choice is not ignored

- Focus on **modal shift** away from SOVs – this is the **ideal commute travel behavior**
- Reducing emissions (e.g. "eco-driving") should also be supported, but at a lesser weight than mode-shift.[1]
  - Flexing trips and telework are the sole focus of other Commuter Connections programs
- Keep it **simple**: Create an inviting and enticing experience for users that is easy to understand and therefore participate.[2]
  - Add new features/variation periodically to keep up participation rates

PART 2: TRACKING METRICS

Through the **application dashboard**, Commuter Connections will track the following metrics:

- Vehicle Trips Reduced
- Vehicle Miles of Travel Reduced
- Emissions Reduced – *includes Nitrogen Oxides (NOx) and Volatile Organic Compounds (VOC)*
- Energy Savings – *reduction in the number of gallons of gasoline consumed*

Surveys consistent with the Commuter Connections Evaluation Framework will be administered to measure overall program satisfaction and participation. These surveys, in conjunction with the incenTrip dashboard, will help evaluators determine the number of **alternative mode placements** generated from incenTrip.[3]

PART 3: INCENTRIP CUSTOMIZATION RECOMMENDATIONS FOR SUMMER RELEASE

The incenTrip application, in its current "pilot" form, by-and-large accomplishes the abovementioned program goal. The below customizations are suggestions for UMD to help better align the application with the program goal.

Recommendation 1: Prioritize modal shift to SOV-alternatives during the peak commute
The incenTrip app will need to be customized to promote mode shift during the peak commute times in order to best accomplish the program goal. There remains an opportunity to expand the scope of the app in future program years, depending on app usage. Commuter Connections staff will actively monitor usage to make data-driven decisions going forward.

Action 1.1: Adjust the point allocation model to *only award points* to trips that occur between 6:30a – 9:30a and 4:00p – 7:00p during weekdays.

Action 1.2: Adjust the point allocation model to give a greater weight to transit, carpooling, vanpooling, bicycling, walking, or any combination thereof than other options, such as TNCs, eco-driving, flex trips, etc. (See *Recommendation 3, Table 1*)

Recommendation 2: Allocate points in a manner that is mode-agnostic and does not favor long-distance commutes
Commuter Connections has elected to treat all non-SOV travel modes equally during the first iteration of incenTrip. This will help create a level playing field among mode choices. Additionally,

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[1] Commuter Connections *TDM Program Elements Revised Evaluation Framework* (FY2018-FY2020), pg. 11
[2] Eyal, Nir. *Hooked: How to Build Habit-Forming Products* (2014), pg. 67-73
[3] Commuter Connections *TDM Program Elements Revised Evaluation Framework* (FY2018-FY2020), pg. 12-13

Commuter Connections wishes to reward non-SOV trips equally, regardless of distance. A user should not be penalized for living close to their workplace.

Action 2.1: Adjust the point allocation model to award 100 points per non-SOV trip. Reduce the points earned using the scaling model described in Recommendation 3. Eco-driving, TNC trips, and flex trips will be worth 10 points. (See *Recommendation 3, Table 1*)

Action 2.2: Cap the number of trips taken per day at two (i.e. morning and evening commutes). Points cannot be earned on weekends.

Recommendation 3: Develop a tiered points model that adapts to users' behavior over time
incenTrip is equipped with powerful machine learning technology (including artificial intelligence) that measures and monitors users' usage of the app and can adjust the amount of points awarded based on users' behavior. Given the program goal to prioritize mode shift, the amount of points earned by users should be diminished as users transition from SOV commutes to alternative commutes.

Action 3.1: Develop a tiered model that awards points on a diminishing scale. The below table is may serve as a sample model for allocating points to individual users on a per-trip basis. At first, points are awarded generously to "hook" a user on a non-SOV mode. Points may then gradually diminish as non-SOV travel behavior becomes the norm. UMD should develop their own model consistent with this logic and present it to Commuter Connections for approval.

Table 1: Tiered Points Allocation Levels				
	"Hook" Phase	"Sustain" Phase		
Trip Type	Base 90-day intro period; sustained if under seven trips logged per week on average	Level 1 90-119 days of 7+ non-SOV trips logged per week on average	Level 2 120-149 days	Level 3 150+ days
Non-SOV	100	90	75	50
% Change	-	*-10%*	*-25%*	*-50%*
SOV, TNC, etc.	10	10	10	10

Given budget constraints for FY2020, Commuter Connections is opting for a more predictable model of point allocation. The above model recommended by the work group was developed in a manner that makes it very challenging, if not impossible, for users to earn no more than $500 in incentives per calendar year. Commuter Connections may need to include a $500 maximum award eligibility in their Terms of Use. The below table demonstrates the constraints of the recommended tiered points accumulation model.

Table 2: Maximum Use Commuter Scenario				
Reward Level	Points per Trip	Eligible Working Days*	Twice Daily Eligibility	Maximum Points Earned
Hook: Base Level	100	64	[double]	12,857
Sustain: Level 1	90	21	[double]	3,857
Sustain: Level 2	75	21	[double]	3,214
Sustain: Level 3	50	129	[double]	12,857
			Total Points to be Earned:	32,786

Eligible working days contains the workdays within a 3-month period for the Hook: Base Level, *a 1-month period for both* Sustain: Level 1 *and* Sustain: Level 2, *and a 6-month period for* Sustain: Level 3. *It is assumed 20 days of holiday, vacation, and sick leave will be taken.*

Recommendation 4: Create various levels of monetary rewards that appropriately correspond with point redemption totals

Commuter Connections will provide the monetary incentives that will serve as the rewards users may earn by redeeming their points. Users must be able to easily redeem points for their awards and may choose between various dollar amounts based on the amount of points used to "purchase" a reward. In general, the larger the monetary reward, the lower the point-to-dollar ratio should be, which will give users a nudge to earn and save up their points.

Action 4.1: Categorize the monetary rewards into three different levels:

Table 3: Cumulative Rewards Categories				
Reward Level	Point Redemption	Monetary Reward	Maximum Reward*	Point-to-Dollar Ratio
Low*	1,000	$10	$320	100:$1
Medium	2,000	$25	$400	80:$1
High	3,500	$50	$450	70:$1

Per calendar year, using estimation method detailed in Recommendation 4

Recommendation 5: Maintain the "badge" level gamification element, but structure in a manner that offers a greater challenge as behavior changes

Badge levels are a gamification component that offers a fun way to encourage continuous usage of the incenTrip app for users who seek to be recognized for their achievements.

Action 5.1: Develop badge level tiers to the specifications outlined in the table below.

Table 4: Monthly Badge Levels: Proposed Structure								
Level	Name	Point Threshold	% Change	# Commutes Needed (by level)				Points Awarded
				Hook	Sustain (1)	Sustain (2)	Sustain (3)	
1	Seed Saver	0	-	-	-	-	-	-
2	Leaf Saver	300	-	3	4	4	6	20
3	Tree Saver	600	50%	6	7	8	12	30
4	Forest Saver	1,000	40%	10	12	14	20	40
5	Planet Saver	1,600	38%	16	18	22	32	50
							Monthly Total	140

Action 5.2: Give the option for a user to be recognized as they achieve new levels. This could be done through links to share their accomplishments on social media.

Action 5.3: Maintain the ability for users to see the following:
- Total points earned in a month
  - Also include total lifetime points earned (for reference)
- Number of points needed to achieve the next badge level

- Current rank and percentile (note: this will serve as a substitute to the leaderboard)

Action 5.4: Clearly communicate to users that badge levels are reset on a monthly basis.

Action 5.5: Record users and their levels within incenTrip administrative dashboard so Commuter Connections can export data (and give rewards, tag in social media posts, etc.) *(See also: Action 7.1)*

Recommendation 6: Include various progress goals
Progress goals are an additional gamification element that rewards goal-oriented users for their accomplishments. Progress goals can be especially influential in encouraging users to try different modes.

Action 6.1: Include the following as "progress goals":
- Ten trips of [alternative commute mode]. If a user accomplishes these goals, allow them to reset the next month. Points awarded: 50
  - Rideshare (includes carpool and/or vanpool)
  - Transit
  - Bike
  - Walk
  - Multi-Modal
- New non-SOV mode used (one-time goal) Points awarded: 200
- Register for Commuter Connections (one-time goal) Points awarded: 500

Recommendation 7: Data exports from incenTrip admin dashboard
Commuter Connections can better track and monitor program impact if data from the web-based admin dashboard is exportable to Excel.

Action 7.1: Create a reporting module(s) within the dashboard that exports to an Excel-compatible spreadsheet

PART 4: INCENTRIP CUSTOMIZATION RECOMMENDATIONS FOR CY2020

The incenTrip application has robust capabilities that can be leveraged for future growth. The following are suggestions to consider for CY2020.

- Diversify incentives to include:
  - E-gift cards from both local businesses and national chains;
  - The ability to redeem points for material items (i.e. Commuter Connections Swag);
  - The ability for users to donate their monetary awards to approved charities;
  - Pre-loaded WMATA SmartTrip cards or Capital Bikeshare credits;
  - Include the ability for users to redeem points for raffle entries, e.g. a weekly $100 Amazon eGift Card lottery. Users can buy entries into the lottery using their points.
- Create challenges where commuter who travel along congested corridors (e.g. Flextime Rewards corridors, Transform 66, etc.) are targeted. Challenge the user to try a non-SOV mode or flex their trip to non-peak hours. Similarly, create challenges during certain events (e.g. Bike To Work Day/Month, Rideshare Month, etc.) that offer bonus points for respective modes. Include "rapid round" challenges with specialized weekly or daily objectives.

- Create push-notifications so users can be alerted that bonus points may be offered for Qir Quality Alert days, heave pre/post-holiday travel days, etc.

- Utilize machine learning/AI to target specific corridors that are experiencing/projected to experience elevated levels of congestion. Increase the amount of points awarded to users who avoid these corridors that would otherwise typically use them.

- Expand the window for points to be awarded beyond the peak commute times but keep the amount of points awarded at a lower value.

- Integrate FlexTime Rewards.

- Investigate the ability to further customize badges into "levels." For example: An individual who has earned "Planet Saver" during a prior month will have the opportunity to earn "Silver Planet Saver," "gold", "platinum," etc. as they continue to participate. This change will help motivate users to keep participating for a new, more prestigious level of accomplishment as the months progress.

- If users log an SOV trip, send a notification message reminding them they can earn more points by choosing a non-SOV mode.