

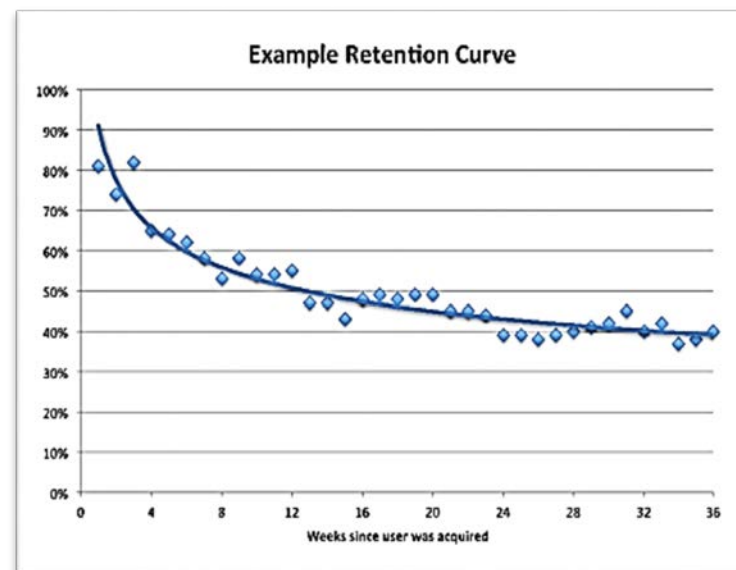
# Commuter Connections 2021 Retention Rate Survey

Topline Highlights



Commuter Connections  
Subcommittee  
March 16, 2021

LDA Consulting  
with CIC Research





# Methodology

## Survey Objective and Methodology

- Survey of random sample of 1,321 commuters who last participated in GRH or received CC services between July 2012-June 2018
- Collect data for 2021-2023 TDM analysis
  - Estimate % of past service users who made alt mode shifts and were “retained” in those modes
  - Apply “retained” credit to GRH and Commuter Oper Center
  - Data collected
    - CC programs used
    - First and last CC “activity” year
    - Current modes (and pre-pandemic)
    - Modes before receiving/using services
    - Drive alone users – previous alt mode, when shifted to DA
    - Alt mode users – Reasons for continued alt mode use and influence of CC services



# Analysis Divided Respondents into Categories by “Program Used” and “Last Activity” Date

## 3 programs

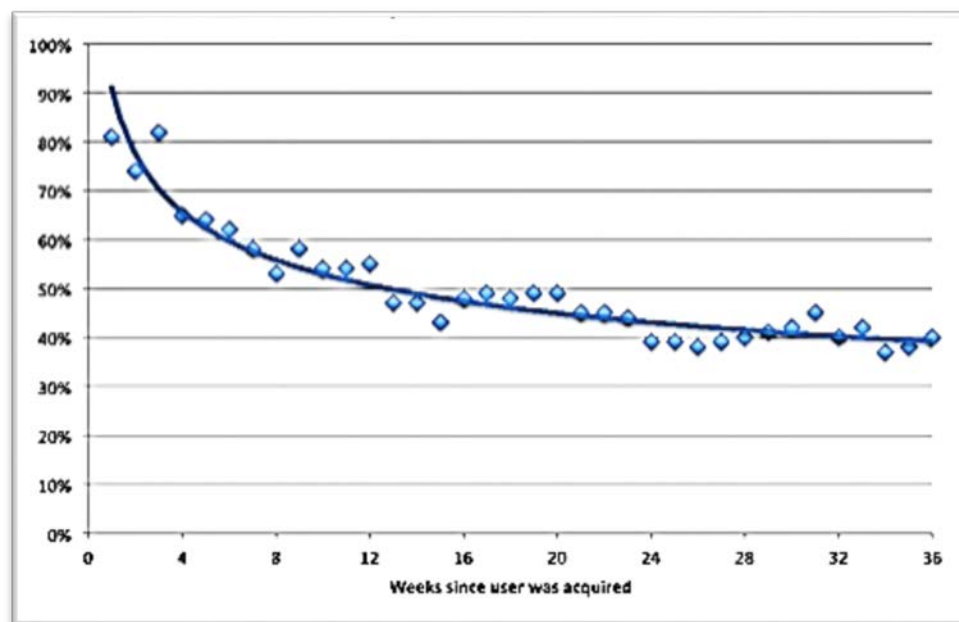
- GRH only – Received only GRH
- Non-GRH only – Received only non-GRH service
- GRH/Non-GRH – Received GRH AND non-GRH service

## 3 last activity dates

(Defined by database)

- 2012-2014
- 2015-2016
- 2017-2018

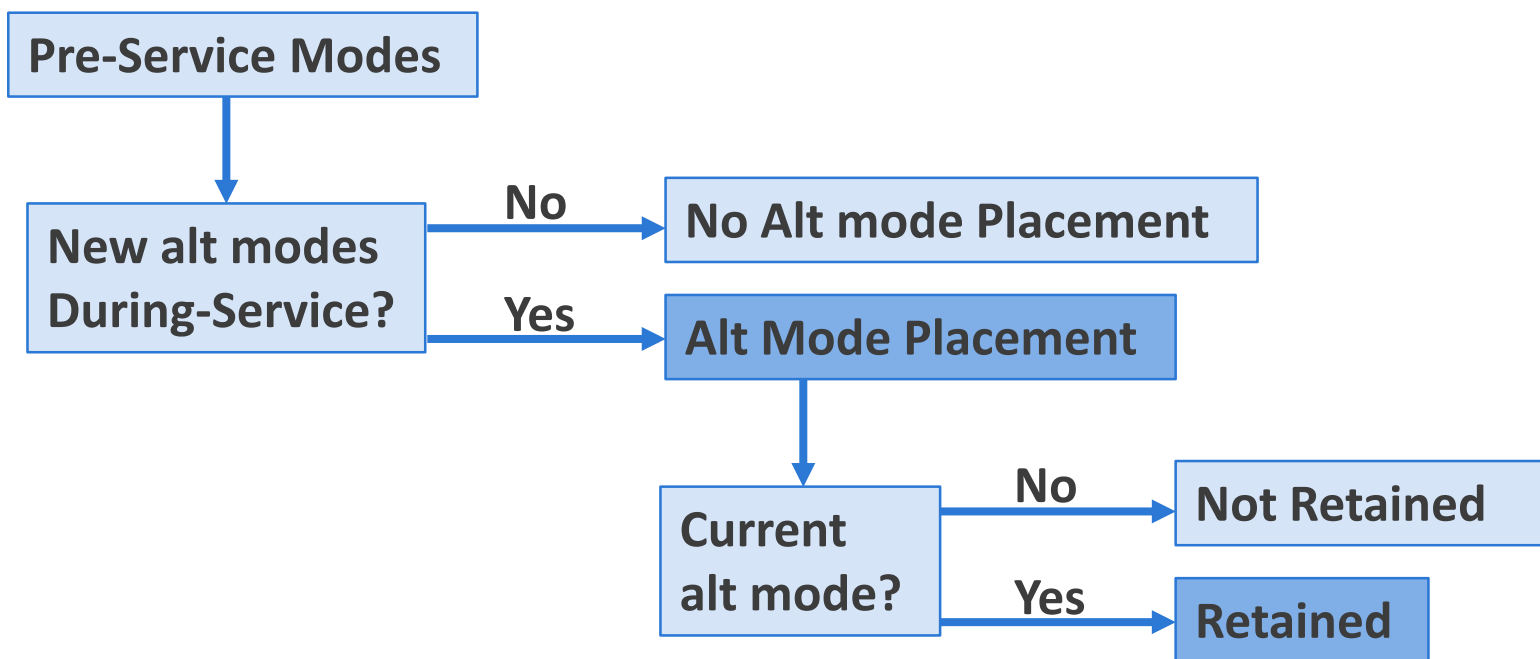
OBJECTIVE; Develop “**Retention Curve**” of declining alt mode use by year since last activity



# Survey Collected Data to Assess Commute Change

**Retained Commuter** – Commuter changed to a new alternative mode with/after receiving CC services and continued using the new alt mode

## Two Tests



## Mode Data Collected for Multiple Time Period

Three time periods for analysis:

- Current travel
- Before receiving services – GRH registration / non-GRH service
- During service (if current travel is drive alone)

Coronavirus pandemic disrupted commute patterns, so modes used at the time of the survey were not expected to reflect either the recent travel or likely future commutes

2021 survey asked about three recent commute travel cases

- Current travel – at the time of the survey (February 2021)
- Pre-pandemic travel – Feb 2020, before pandemic began
- Likely travel when pandemic is over

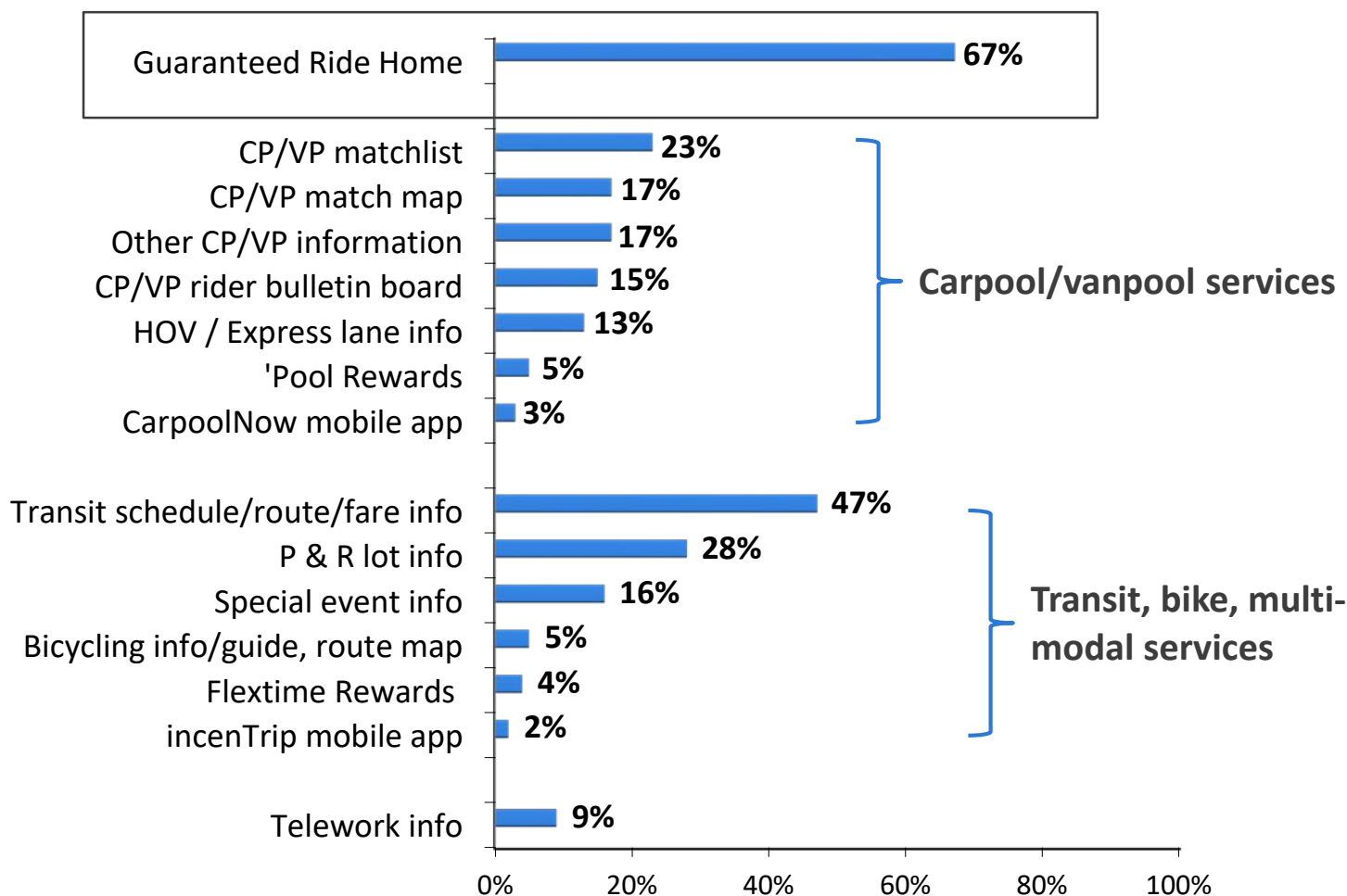
These three time periods were used to define the most likely commute for comparison with modes used before receiving services



Services Received –  
What and When

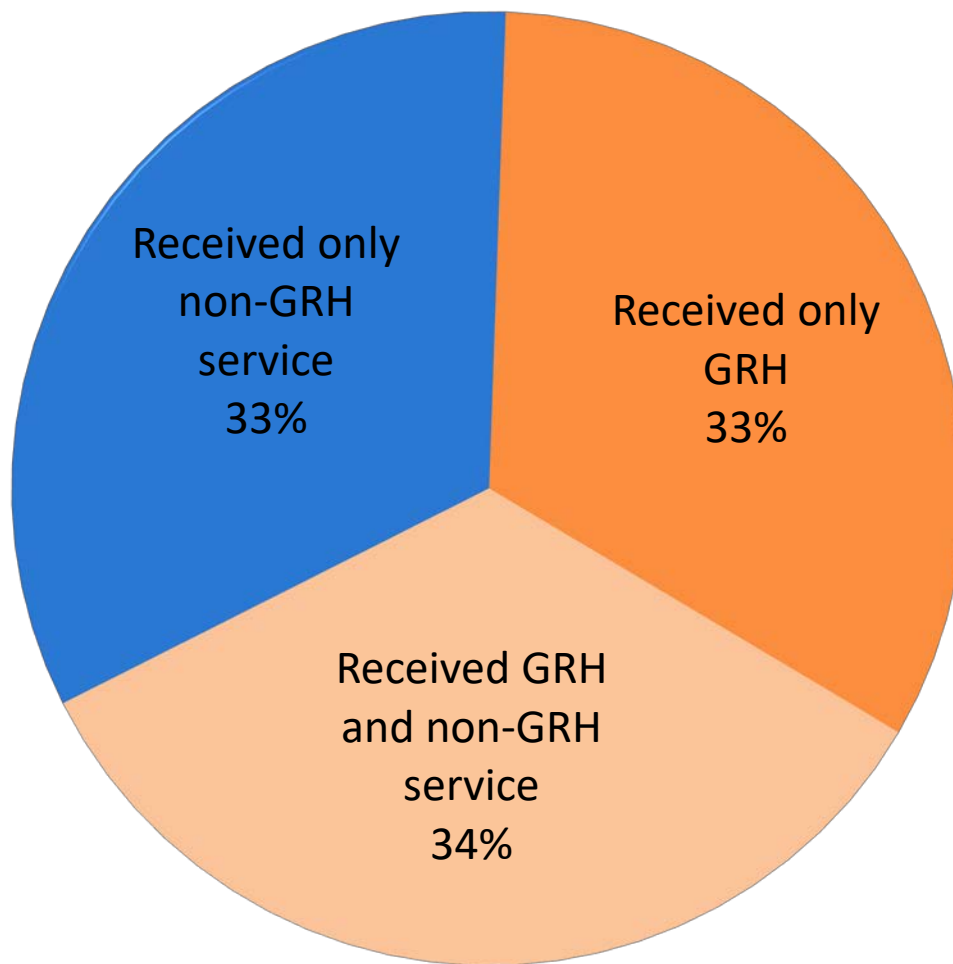
# Two-thirds of Respondents Participated in GRH

Nearly half received transit information; carpool/vanpool services also were common; 9% got telework info





# Respondents were Evenly Divided Between GRH Only, Non-GRH Only, and GRH/Non-GRH

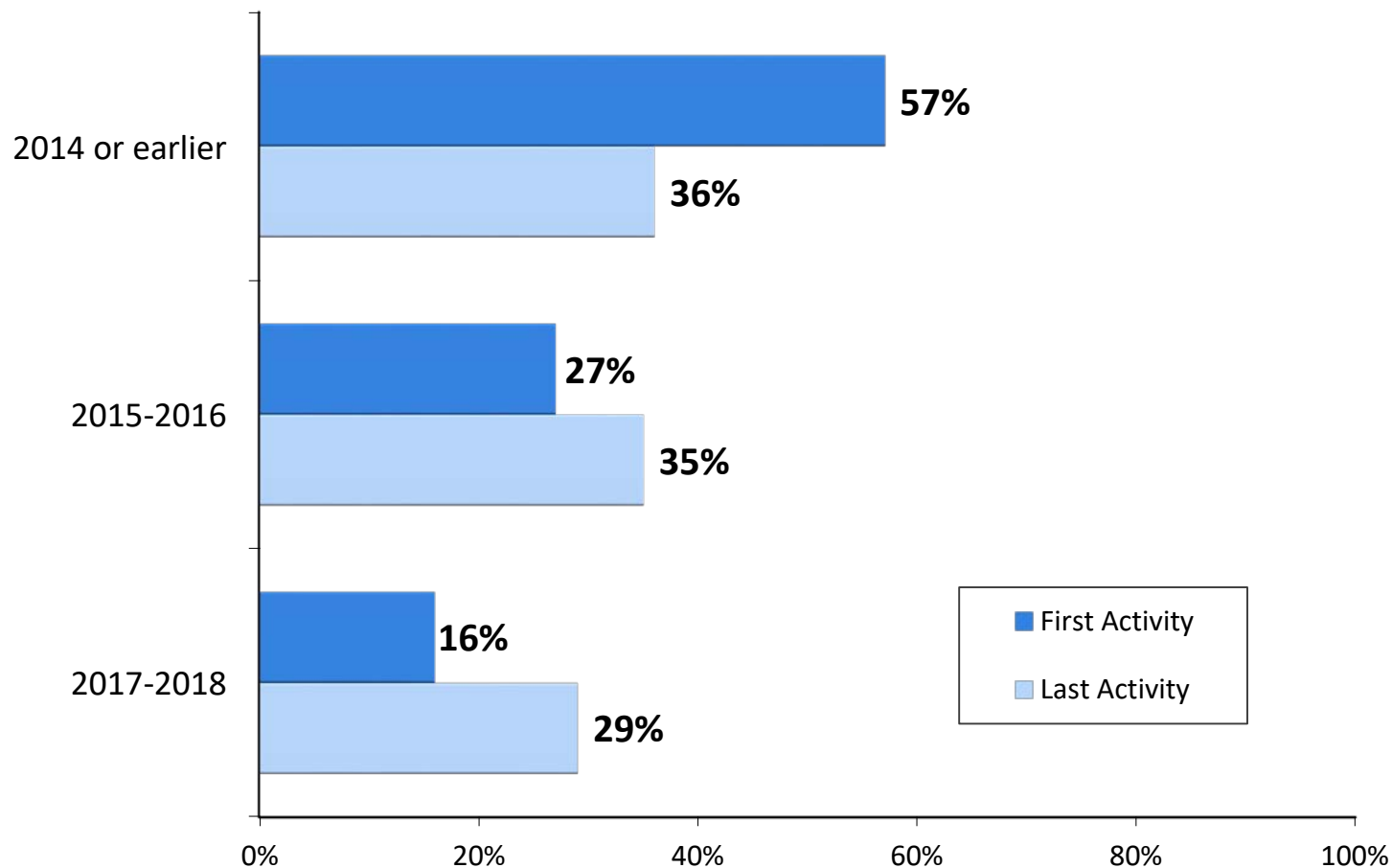


**GRH Users “Are you currently registered for GRH?”**

- Yes – 25%
- No – 36%
- Not sure – 39%

# 57% of Respondents Said Their First Activity with CC Was Before 2015; 16% Said it Was in 2017 or Later

Last Activity dates were more evenly divided, with 29% in 2017-2018



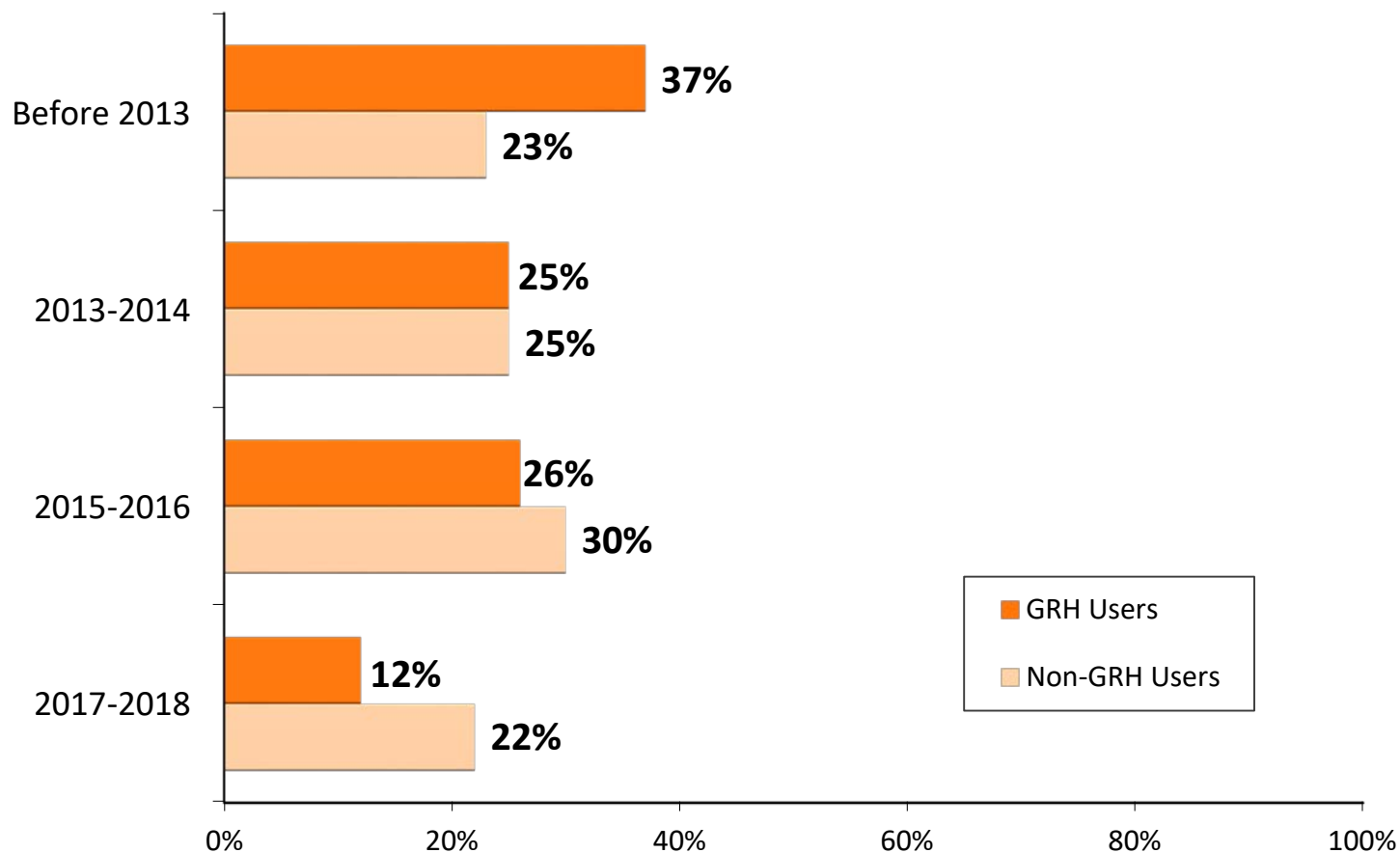
First activity  
(reported by  
respondent)  
n = 1,319

Last activity  
(derived from  
database)  
n = 1,321

Q4 In what year did you first register for GRH?

Q7 In what year did you first access, receive, or request services from Commuter Connections ... ?

62% of GRH Users Said they First Registered for GRH Before 2015; Among Non-GRH Users, 48% Said They Received CC Services Before 2015

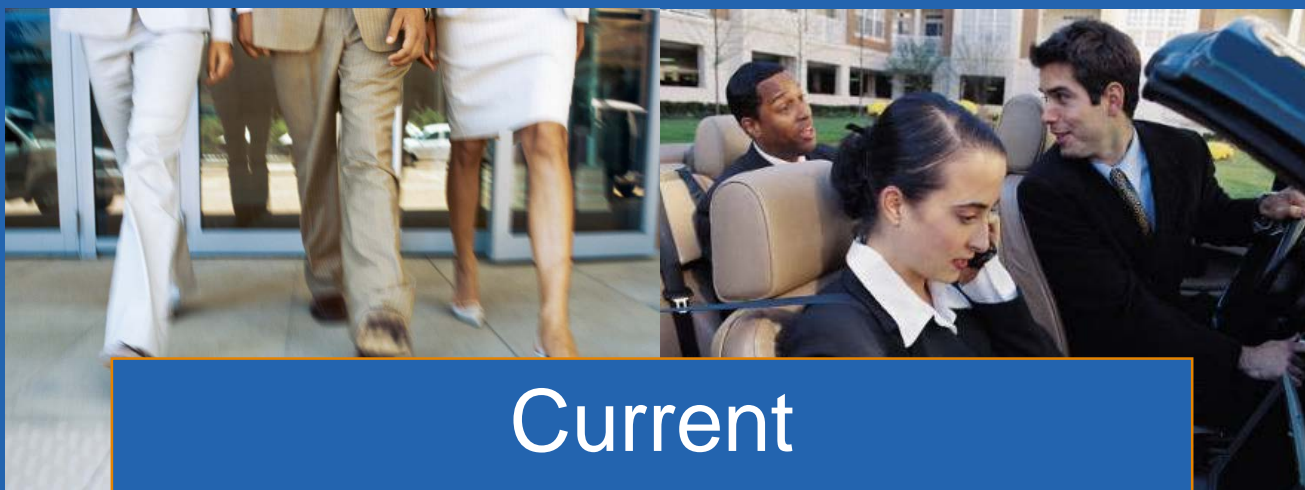


GRH users  
n = 899

Non-GRH users  
n = 420

Q4 In what year did you first register for GRH?

Q7 In what year did you first access, receive, or request services from Commuter Connections ... ?

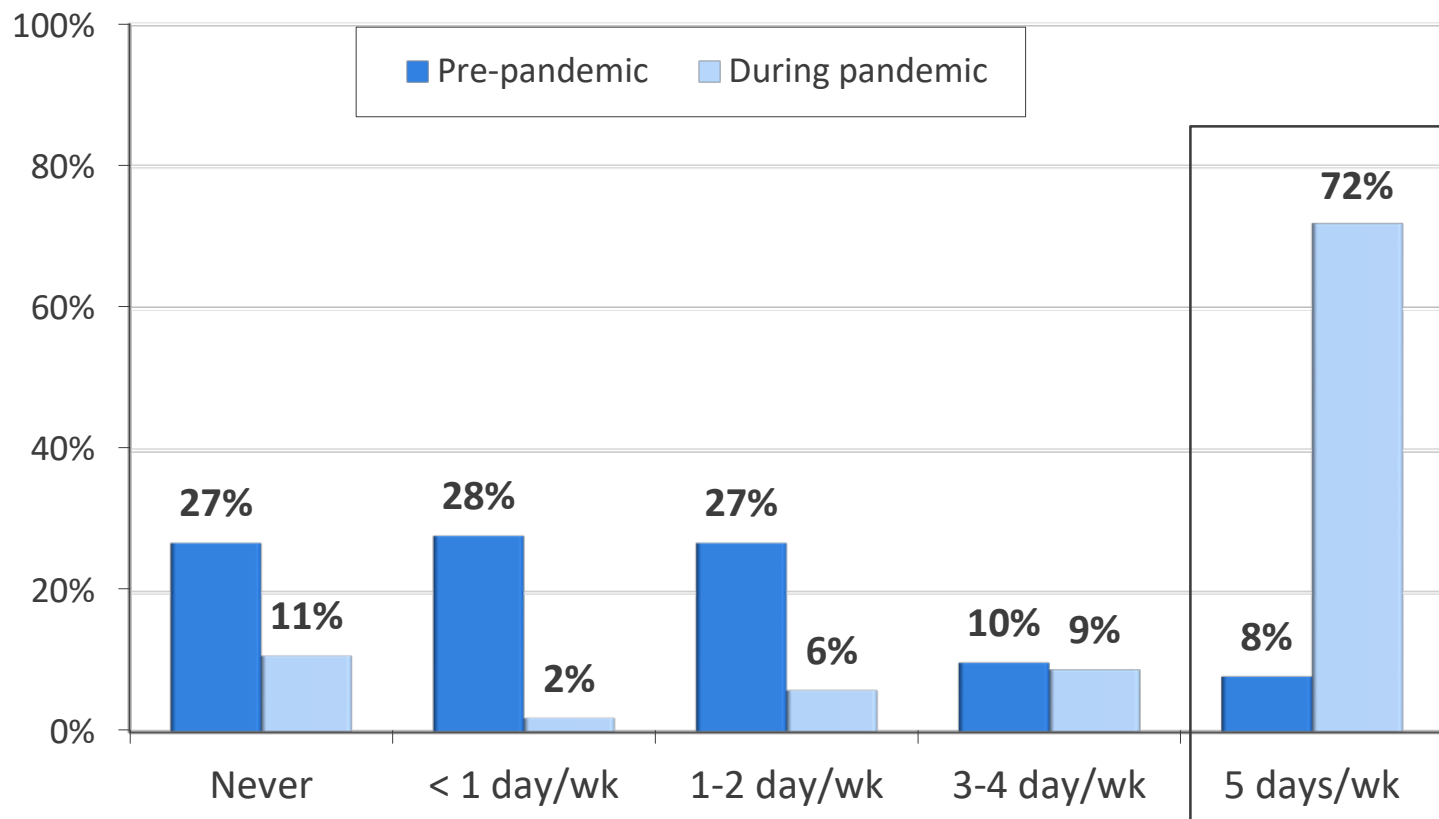


# Current Commute Patterns



# Telework Before Pandemic and During Pandemic

72% of respondents teleworked full-time at the time of the survey. Prior to the start of the pandemic, only 8% teleworked full-time.



Pre-pandemic  
n = 1,317

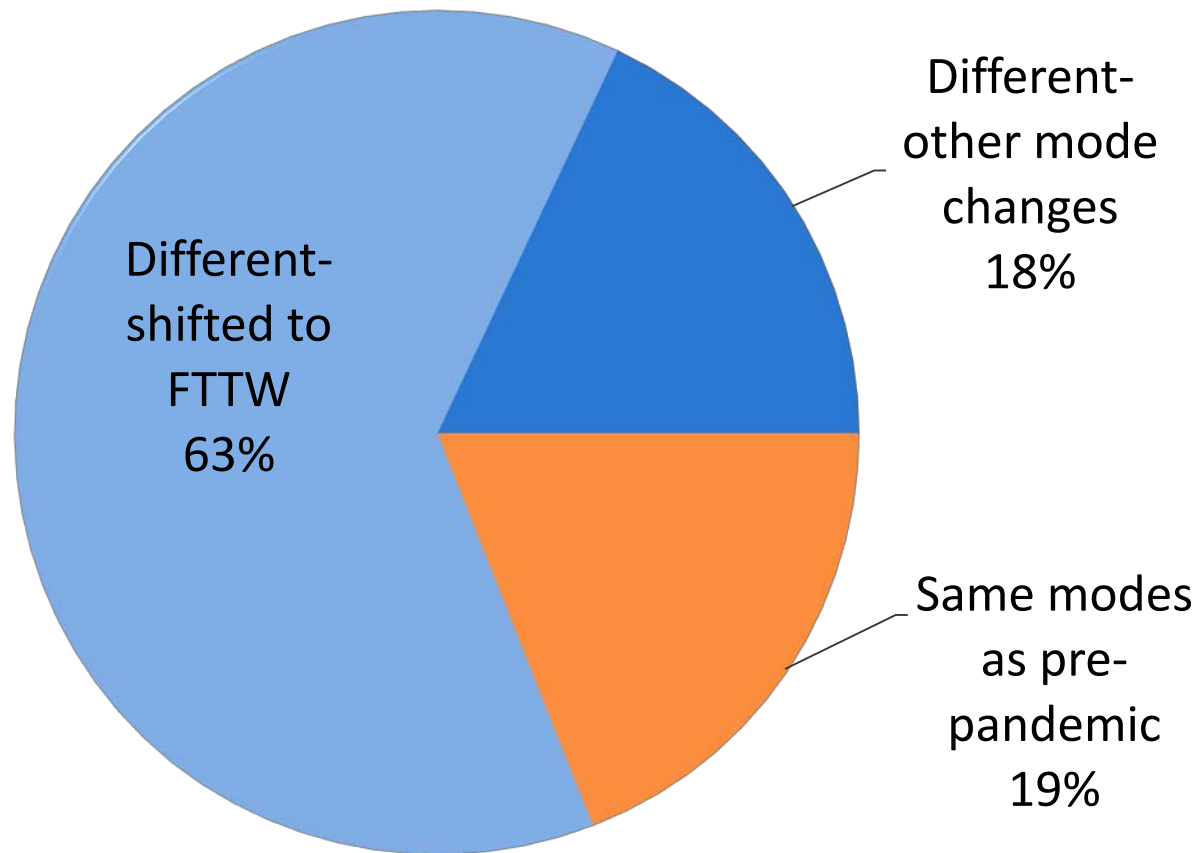
During  
pandemic  
n = 1,317

Q13 How often do you usually telecommute?

Q13a How often did you usually telecommute/work remotely in February 2020, before the coronavirus pandemic began?

## 81% of Respondents Said their Commute in Feb 2021 Was Different than Before the Pandemic

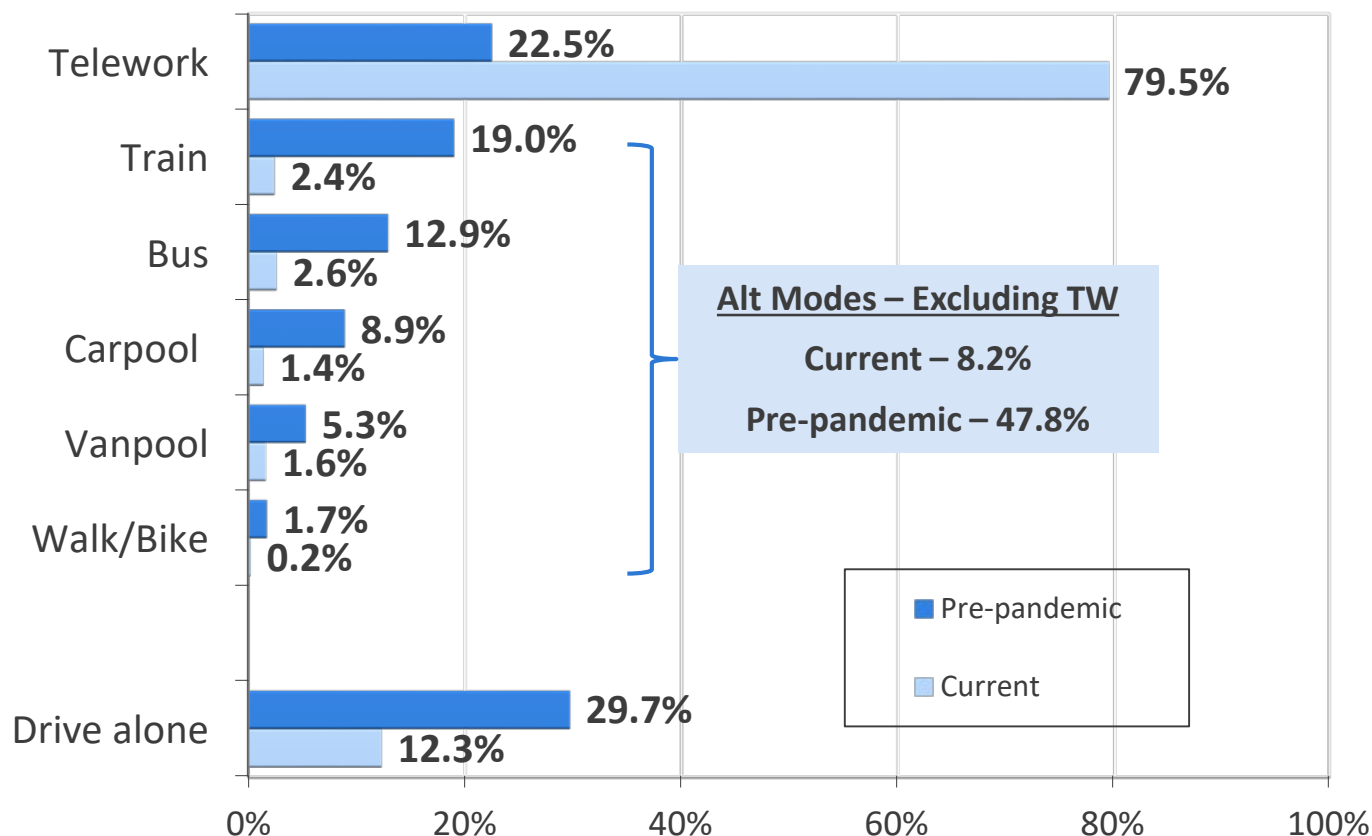
Most (63%) shifted to full-time telework; 18% were still traveling to an outside work location but used different modes than before.



Q15a Is your current travel to work, as you just described it, about the same as your commute last year, in February 2020, before the coronavirus pandemic began?

In Feb 2021, TW Accounted for 80% of Weekly Commute Trips, Alt Modes Accounted for 8%

But before the pandemic, alt modes represented 48% of weekly trips.

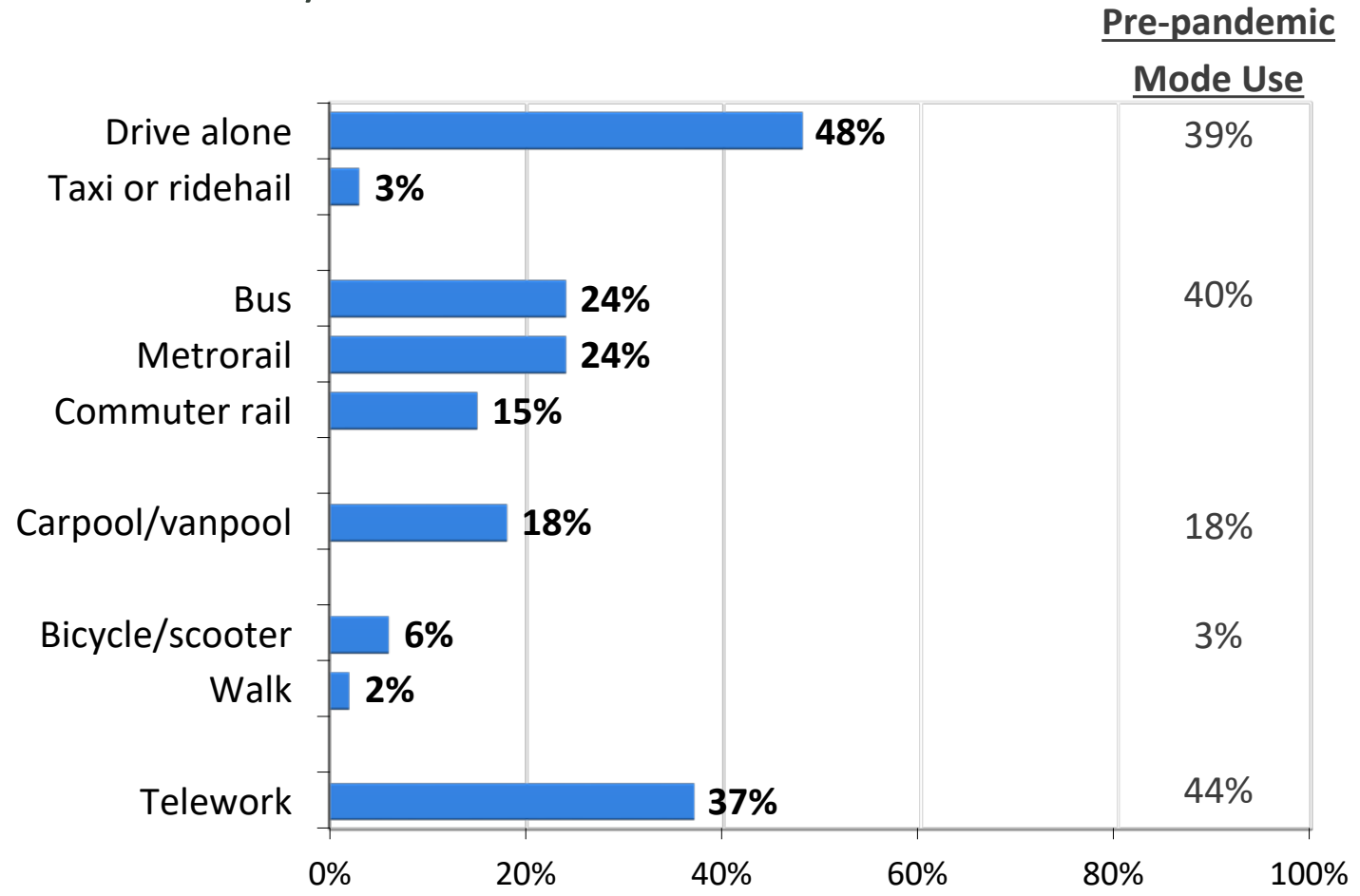


Q15 Thinking about a typical week, Monday through Friday, how do you get to work now? ...

Q16 How did you get to work before the coronavirus pandemic began?

# Likely Mode Use After Pandemic – 1+ Day/Week?

A higher share of respondents said they would drive alone 1+ d/wk after the pandemic, but likely use of alt modes is similar to pre-pandemic, suggesting pre-pandemic mode use is reasonable to use for retention analysis.



Q17a When the pandemic is over, which of following types of transportation do you expect you will use at least once per week for your trip to work?

% of Respondents Using Mode

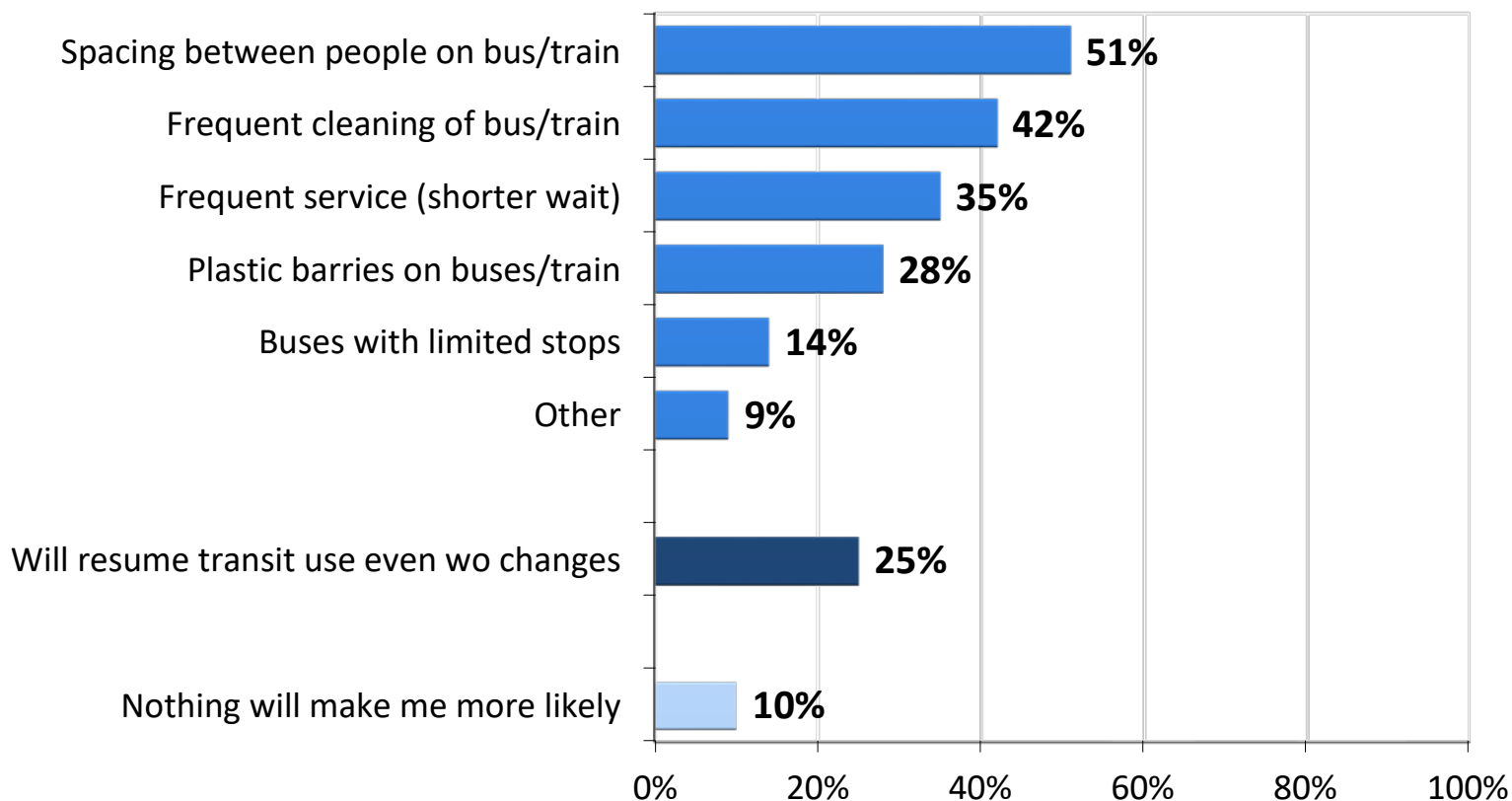
Pre-pandemic n = 1,317

After pandemic n = 1,238



# Transit Safety/Service Changes to Regain Riders

25% of respondents who reduced transit use during the pandemic said they would resume transit use when the pandemic was over, even without transit service/safety changes; 65% mentioned changes that would make them more likely to use transit at their previous level

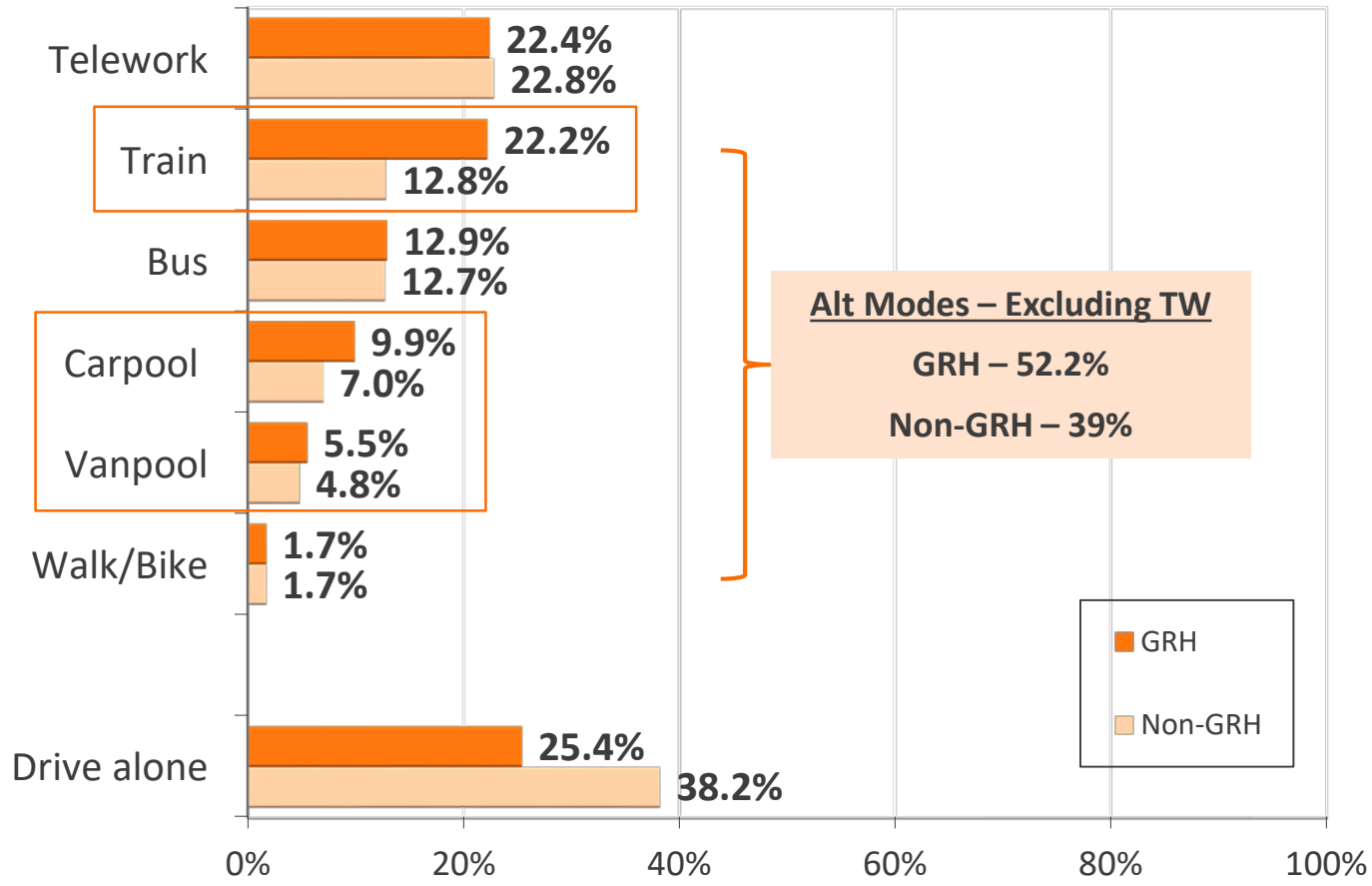


Q18 Which, if any, of the following transit changes would make you more likely to resume your previous transit use for commuting when the pandemic is over?

Transit riders in  
Feb 2020 who  
reduced transit  
use in Feb 2021  
n = 425

# Before the Pandemic, Alt Mode Use Was Higher Among Past GRH Users (52%) than Non-GRH (39%)

The difference was primarily in train and CP/VP



**Current Modes**

**GRH Resp**  
TW – 80%  
AM – 8%

**Non-GRH Resp**  
TW – 78%  
AM – 8%

**Pre-pandemic**

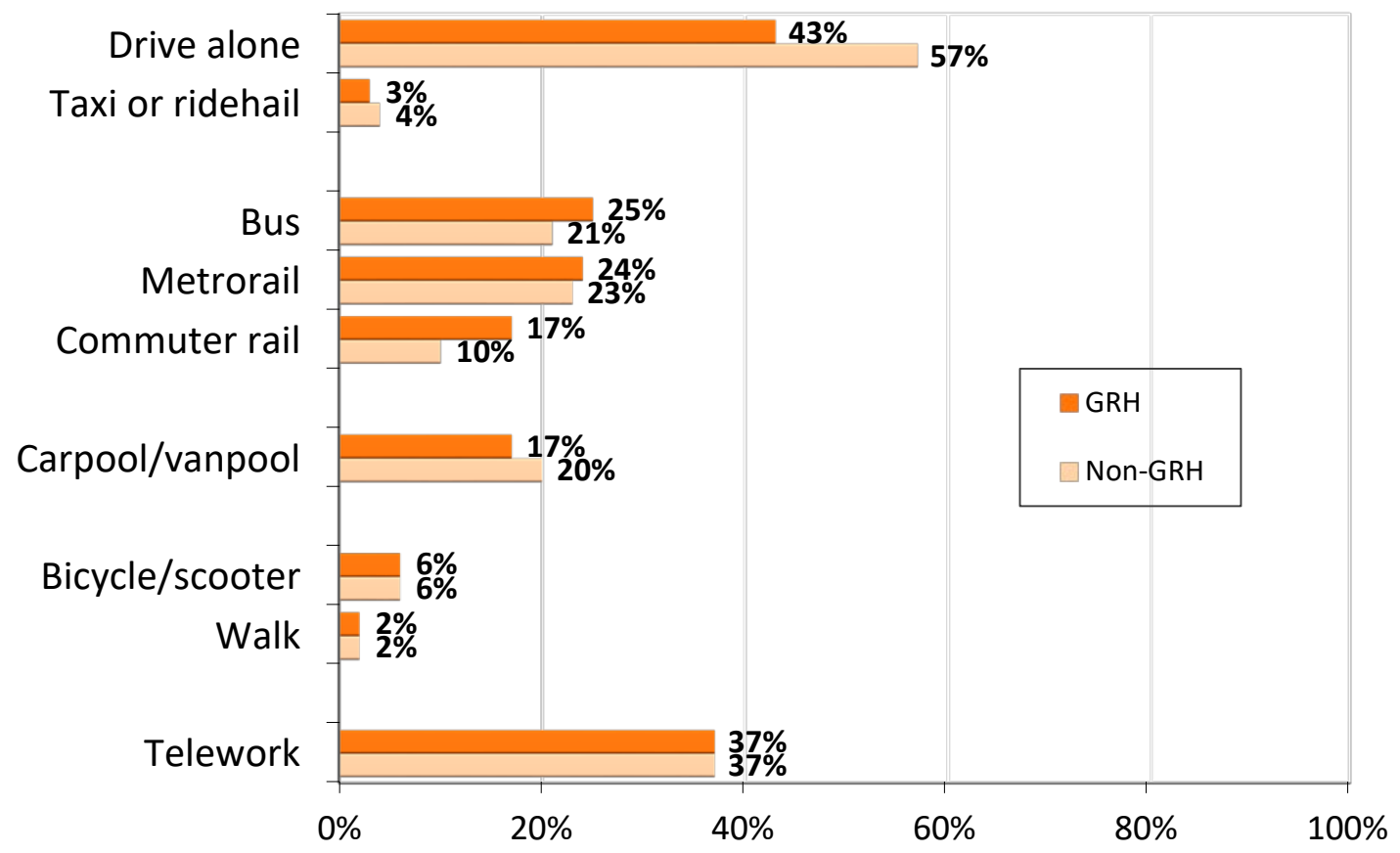
GRH users  
n = 900

Non-GRH users  
n = 421

Q1/Q2 Which of the following services have you accessed, received, or requested from Commuter Connections?  
Q16 How did you get to work before the coronavirus pandemic began?

# Likely Mode Use After Pandemic – 1+ Day/Week?

Respondents who used only Non-GRH services were more likely than were past GRH users to say they would drive alone at least some days after the pandemic, but they also reported planned use of alt modes.



Q1/Q2 Which of the following services have you accessed, received, or requested from Commuter Connections?  
Q17a When the pandemic is over, which of following types of transportation do you expect you will use at least once per week for your trip to work?

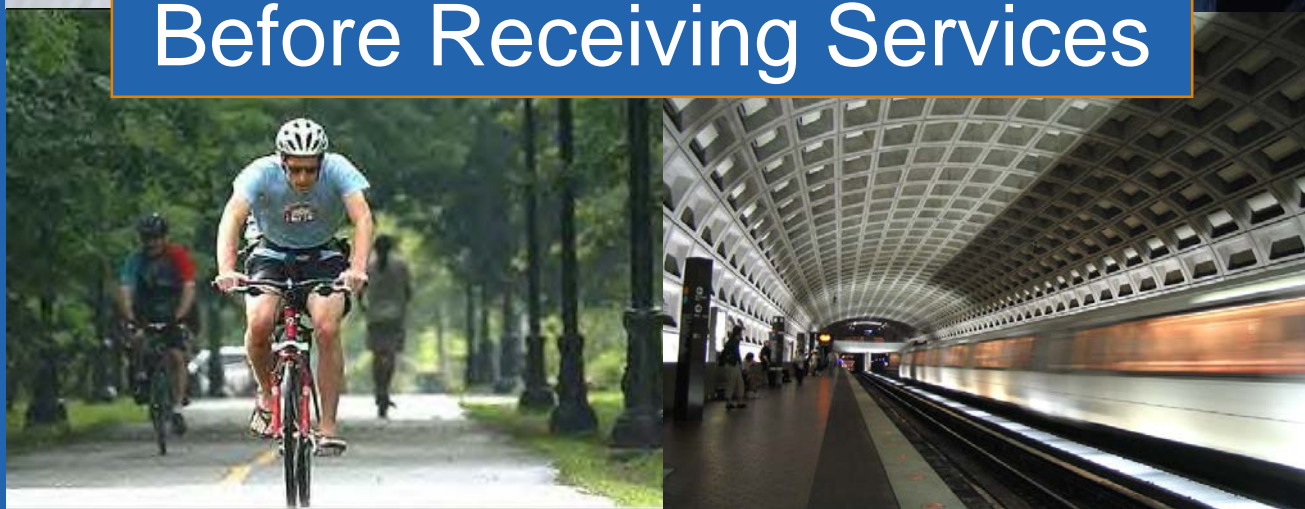
% of Respondents Using Mode

GRH users  
n = 844

Non-GRH users  
n = 394



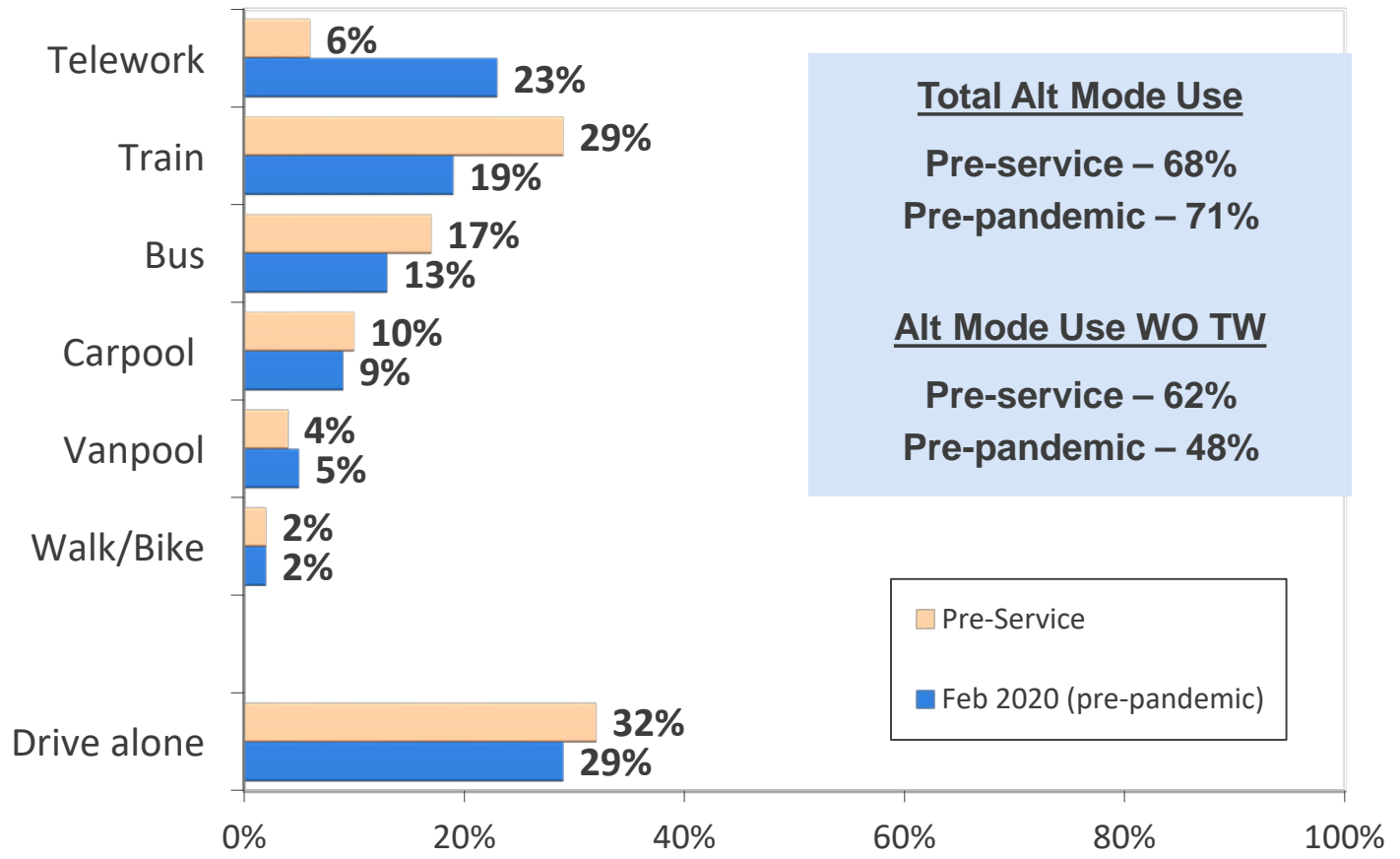
# Commuter Modes Before Receiving Services



# Respondents Used Alt Modes More (71%) in Feb 2020 Than Before They Received Services (68%)

But if TW is excluded, alt mode use declined from 62% to 48%

Timeframe for "Pre-Service" Mode Use  
2012-2018

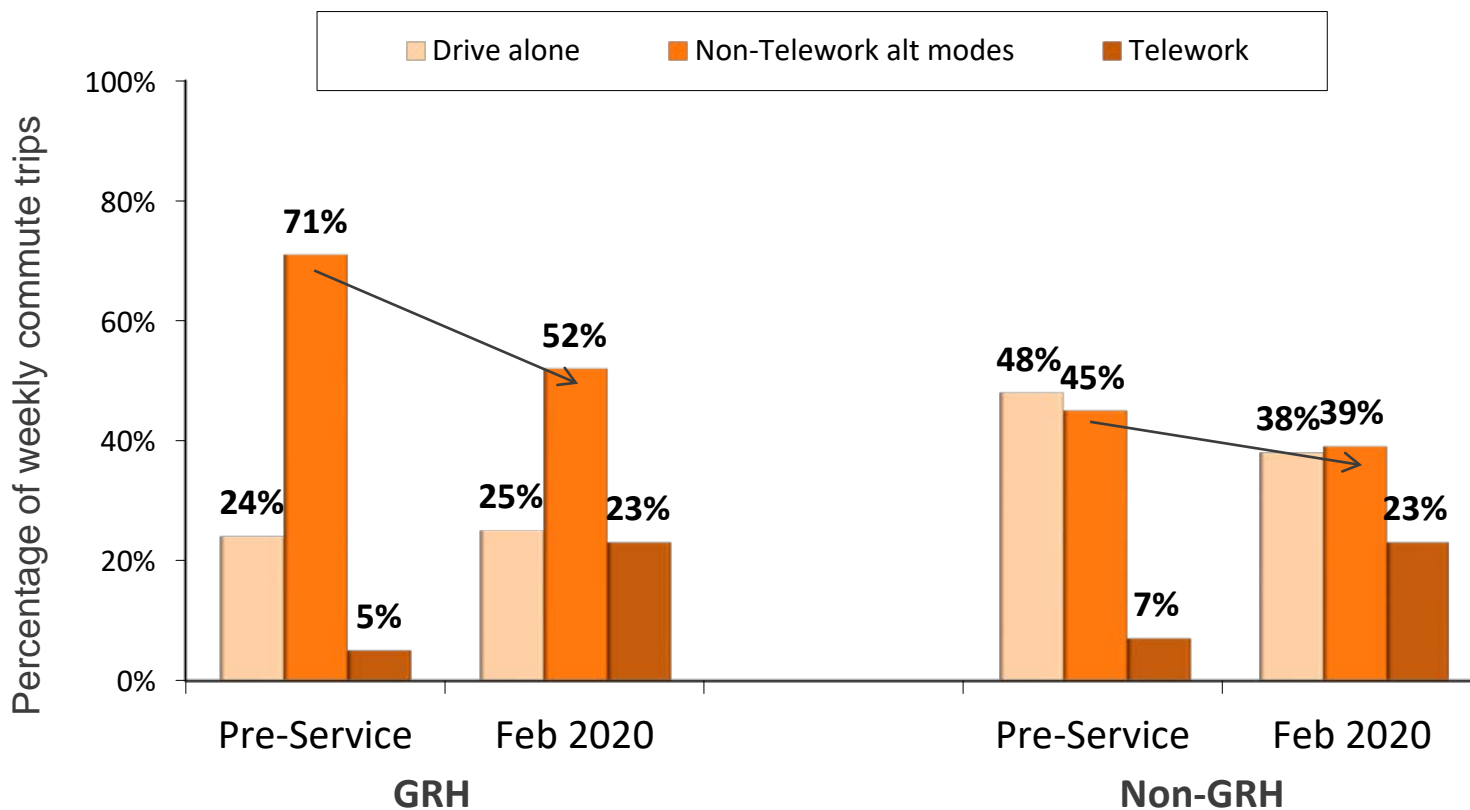


Pre-Service  
n = 1,176  
  
Feb 2020  
n = 1,321

Q16 How did you get to work before the coronavirus pandemic began?  
Q24/Q25/Q30 Before you [registered for GRH, first got information from Commuter Connections] how many weekdays did you use each of the listed types of transportation to get to work?

# GRH Respondents Had Greater Alt Mode Drop from Pre-Service to Feb 2020 than Did Non-GRH Respondents, But They Started at Higher Level

Telework use grew about the same for both groups



CC Program Used

GRH  
n = 799

Non-GRH  
n = 376

Q16 How did you get to work before the coronavirus pandemic began?

Q24/Q25/Q30 Before you [registered for GRH, first got information from Commuter Connections] how many weekdays did you use each of the listed types of transportation to get to work?

# Calculation of Retention Rates for the TDM Analysis

For each respondent – analysis will define:

- **Initial placement?** = modes during CC use vs modes before
- **Retention?** = mode now vs mode during CC involvement

Retained placement rates for GRH and Non-GRH will be applied to counts of past users to estimate commuters still in alt modes

Need to make adjustments to ensure retention rates calculated from survey data don't overestimate the actual rates:

- Inability to reach many past users (retired or died, changed jobs, invalid contact info, perhaps moved out of area?) – **adjust base of past users to exclude those no longer commuting in DC region**
- Non-response among commuters with valid contact info perhaps because they were no longer using alt modes so thought the survey did not apply to them? – **create a composite rate that assumes lower continued alt mode use among NON-surveyed commuters**

Questions?

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