

Commuter Connections 2013 Guaranteed Ride Home Survey Highlights



Commuter Connections
Subcommittee
July 16, 2013
LDA Consulting
with
ESTC, CIC Research, CUTR



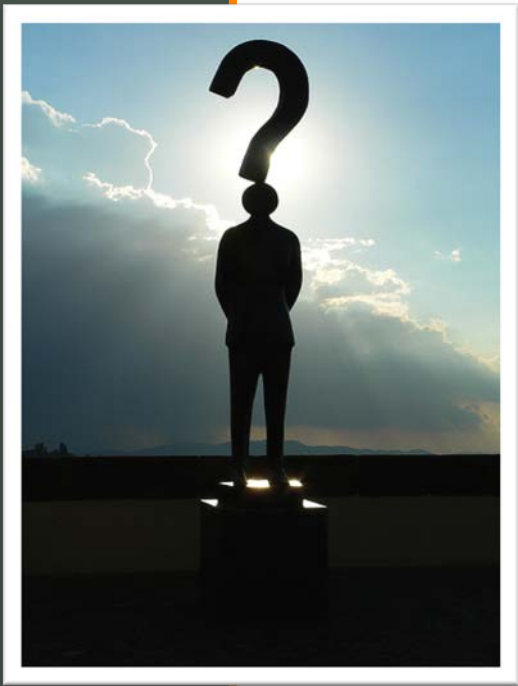


Methodology



Survey Methodology

- Telephone survey of random sample of 2,374 GRH program users
- Fifth triennial survey (also 2001, 2004, 2007, 2010)
- Combination of internet and telephone
- Collect data for GRH TERM
 - Current, during, and pre-GRH travel patterns – travel changes
 - GRH influence on travel choices
 - Use of and satisfaction with GRH
 - Use of other CC services



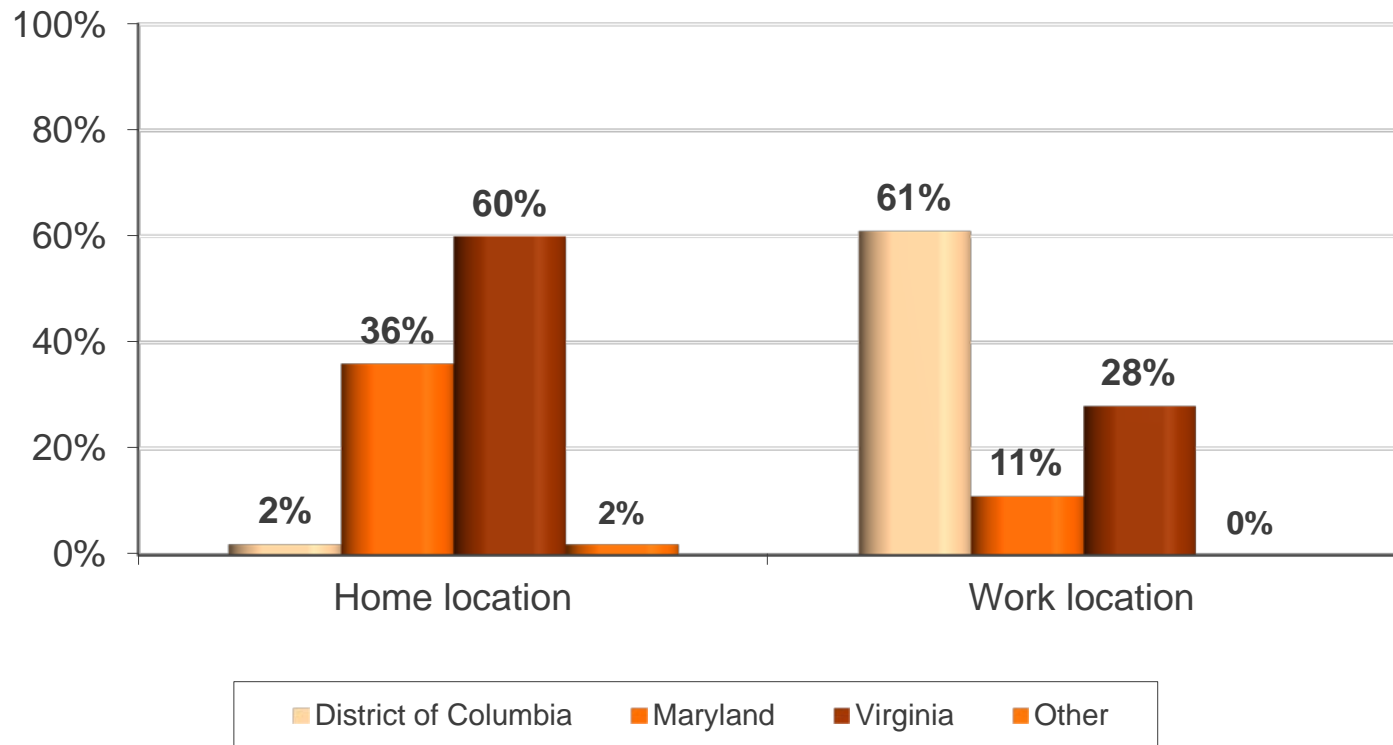


Demographics and Registration



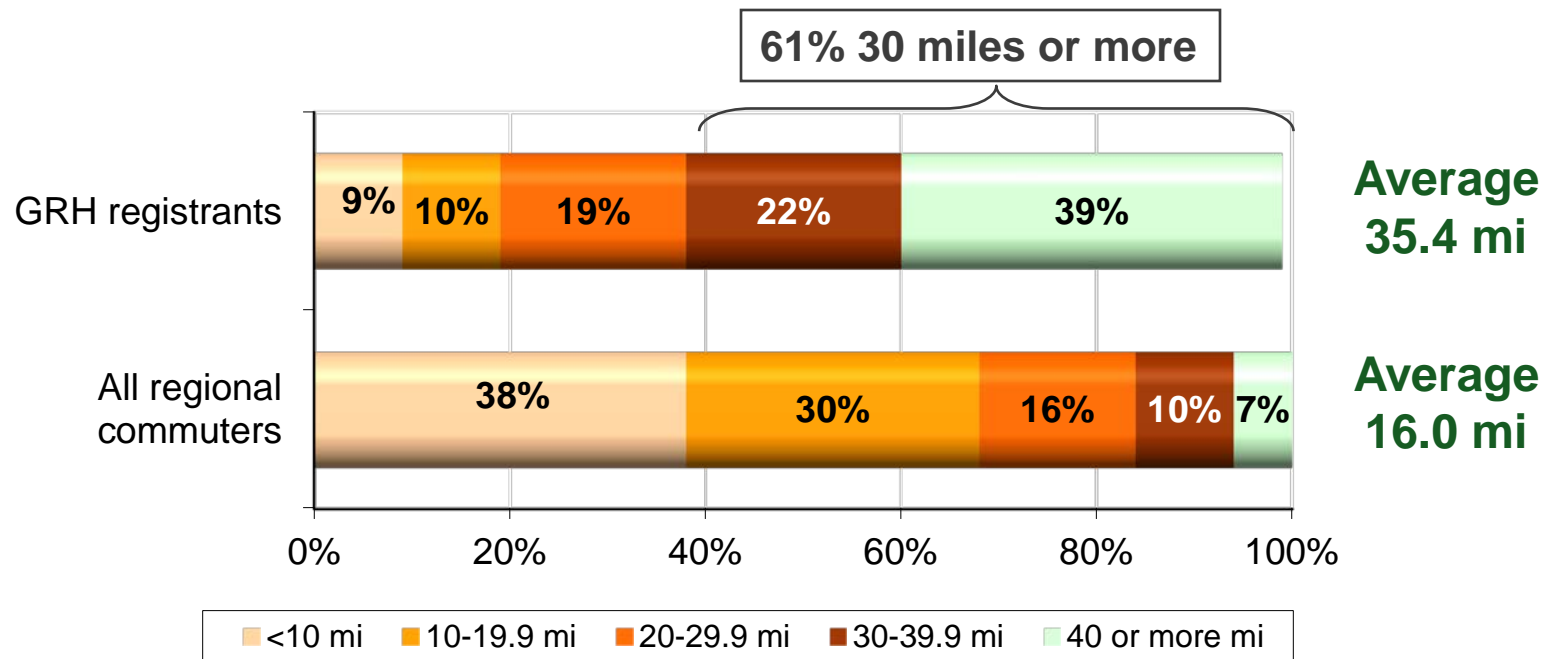
Two-thirds of GRH Registrants Live in Virginia, but Two-thirds Work in DC

This home and work location pattern has been consistent since the 2001 GRH survey



GRH Registrants have Very Long Commutes Compared to all Regional Commuters

The average one-way distance for GRH participants is 35.4 miles, compared to 16.0 miles for all regional commuters; six in ten GRH participants travel 30 or more miles

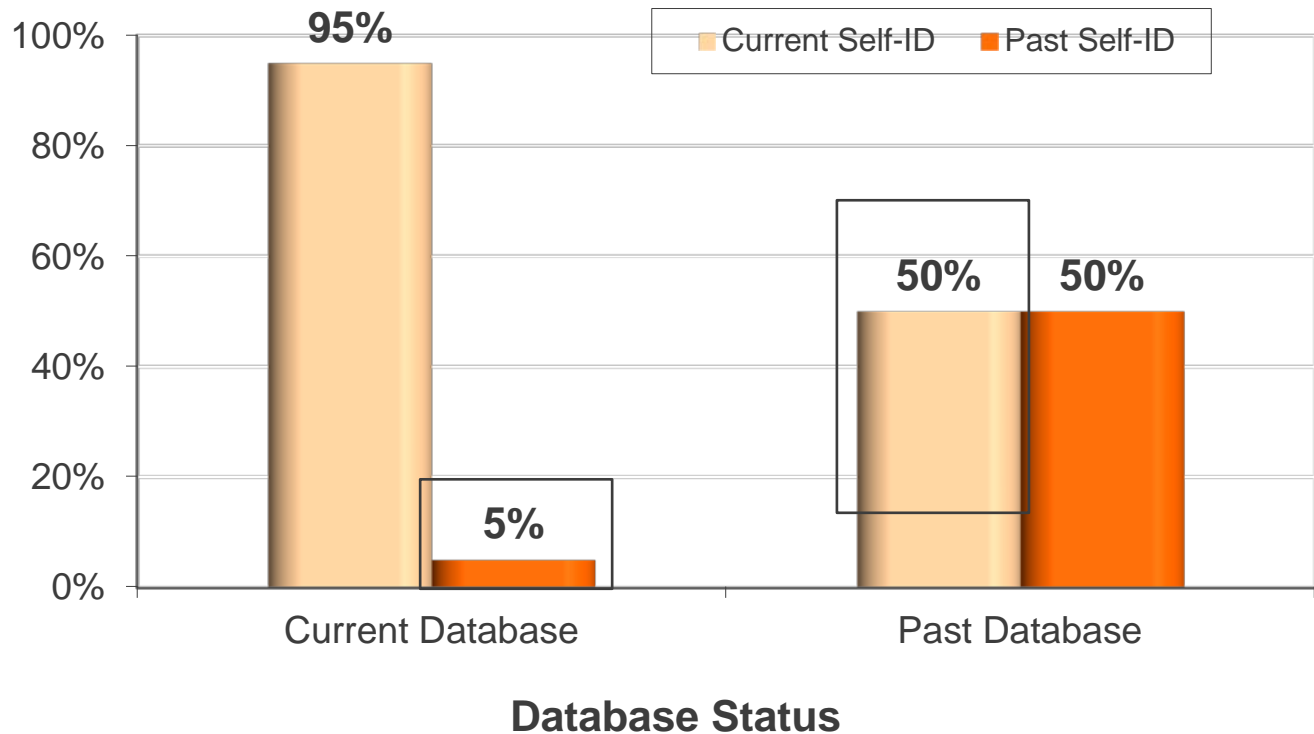


GRH registrants
n = 2,336

All regional
commuters
n = 5,122

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

Most Current Participants Correctly Identified their GRH Status, but 50% of Past Registrants Thought they were Still Registered



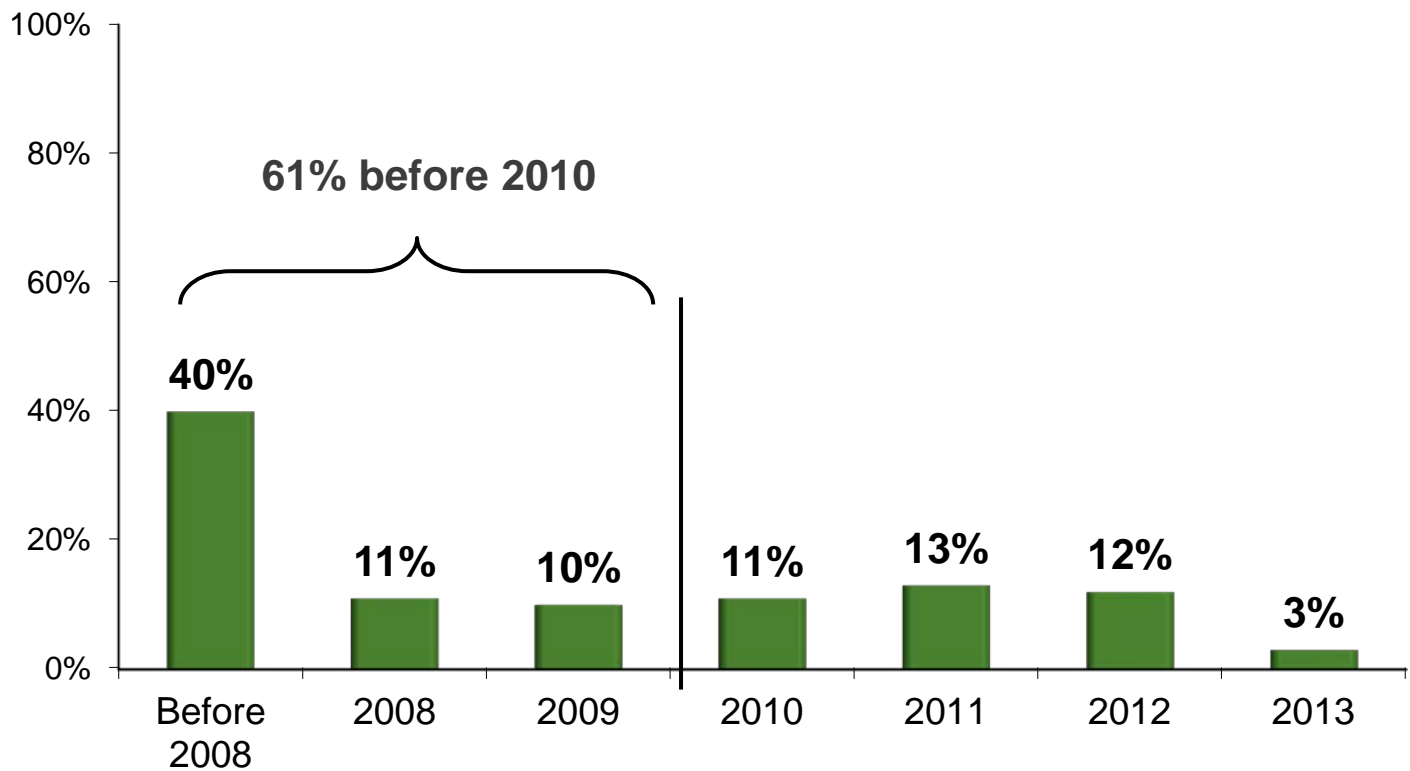
Database Status

Current
n = 1,275

Past
n = 1,098

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

Six in Ten GRH Participants Registered Before 2010; 40% Registered before 2008



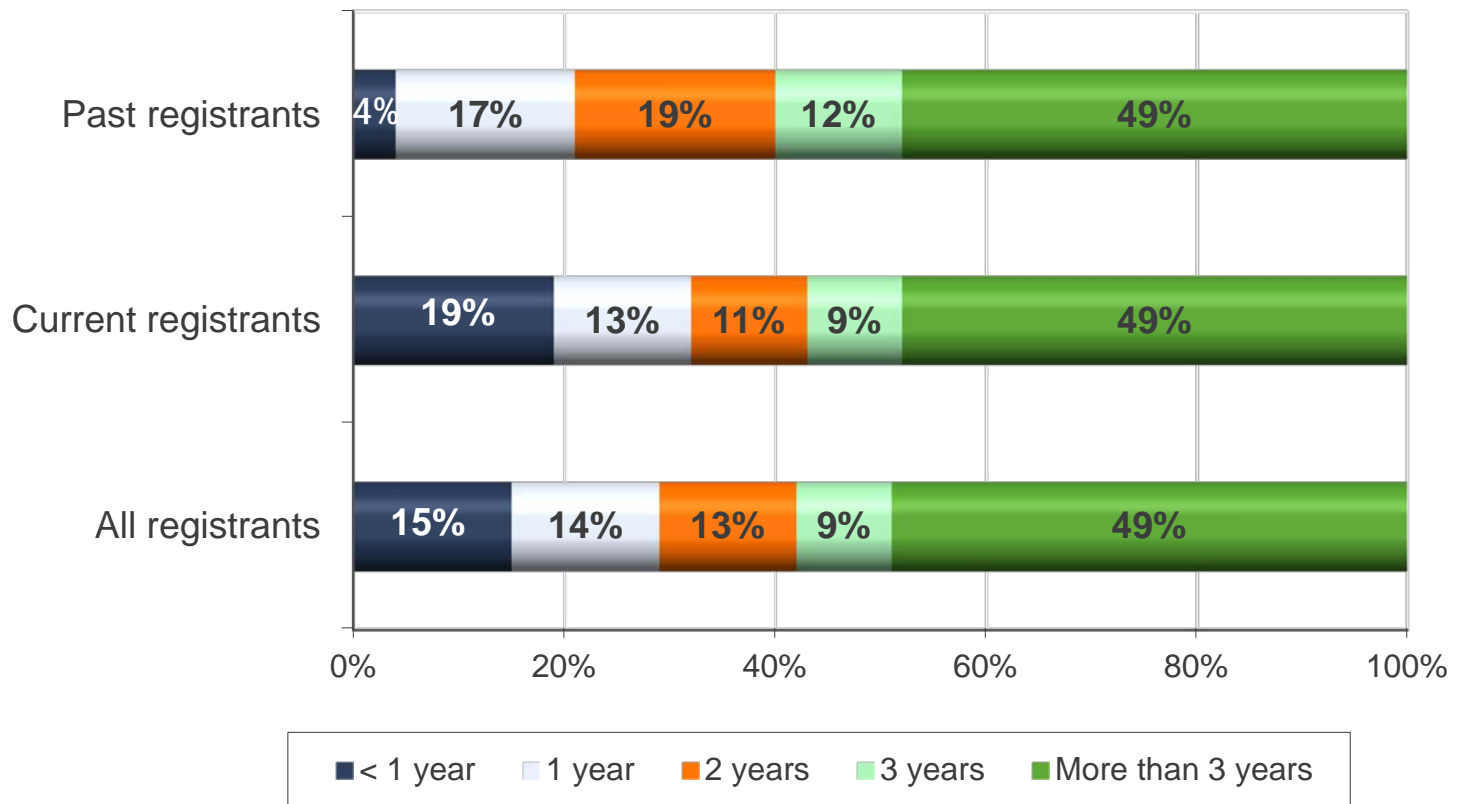
n = 1,945

Note: 3 respondents said they never registered and 426 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 GRH Registrants Participated for Two or More Years

About five in ten participated (past registrants) or have been participating (current registrants) for more than 3 years



All registrants
n = 1,926

Current registrants
n = 1,462

Past registrants
n = 598

Note: Excludes 311 current registrants and 598 past registrants who did not remember when they registered. They are not included in the base for the percentages

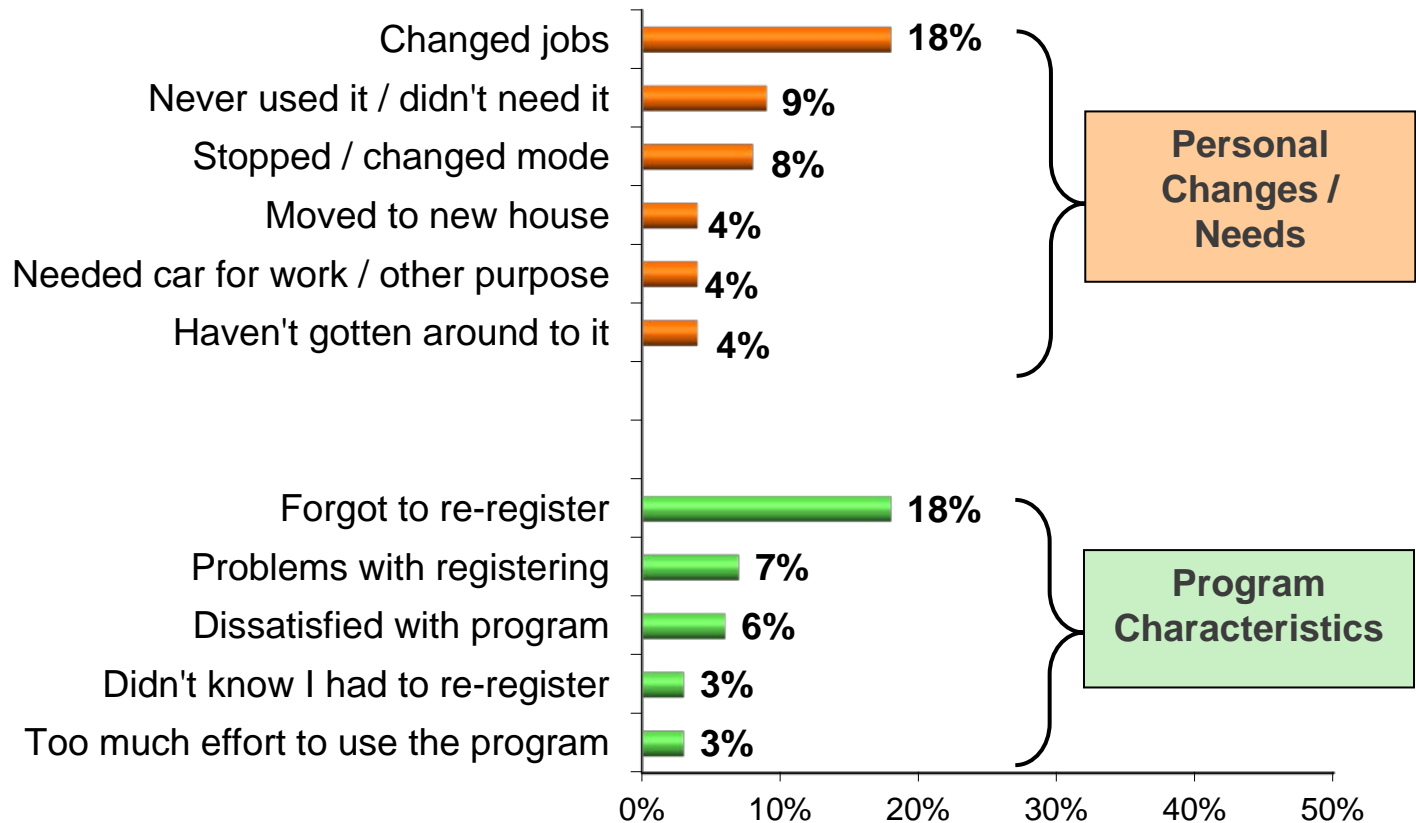
Q4 How long were you registered in the GRH program?

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

But fewer program issues reported than in 2010

2010 Survey

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



2013
n = 402

2010
n = 175

Q5 Why did you not re-register when your registration expired?

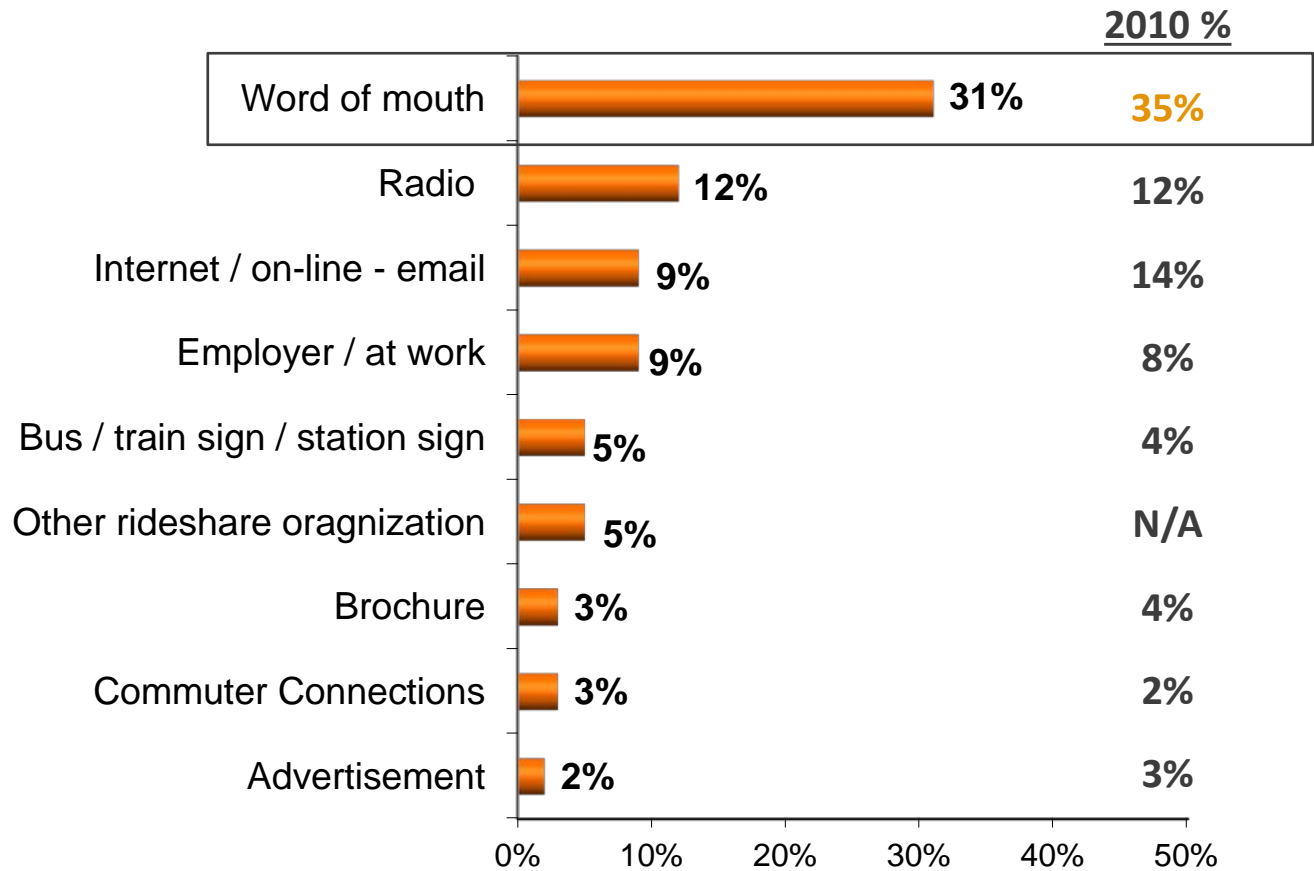
GRH Advertising Recall and Impact



Joan N. Mas 2/2007

Word of Mouth Continues to be the Way Most Registrants Learn About GRH

Similar results to 2010



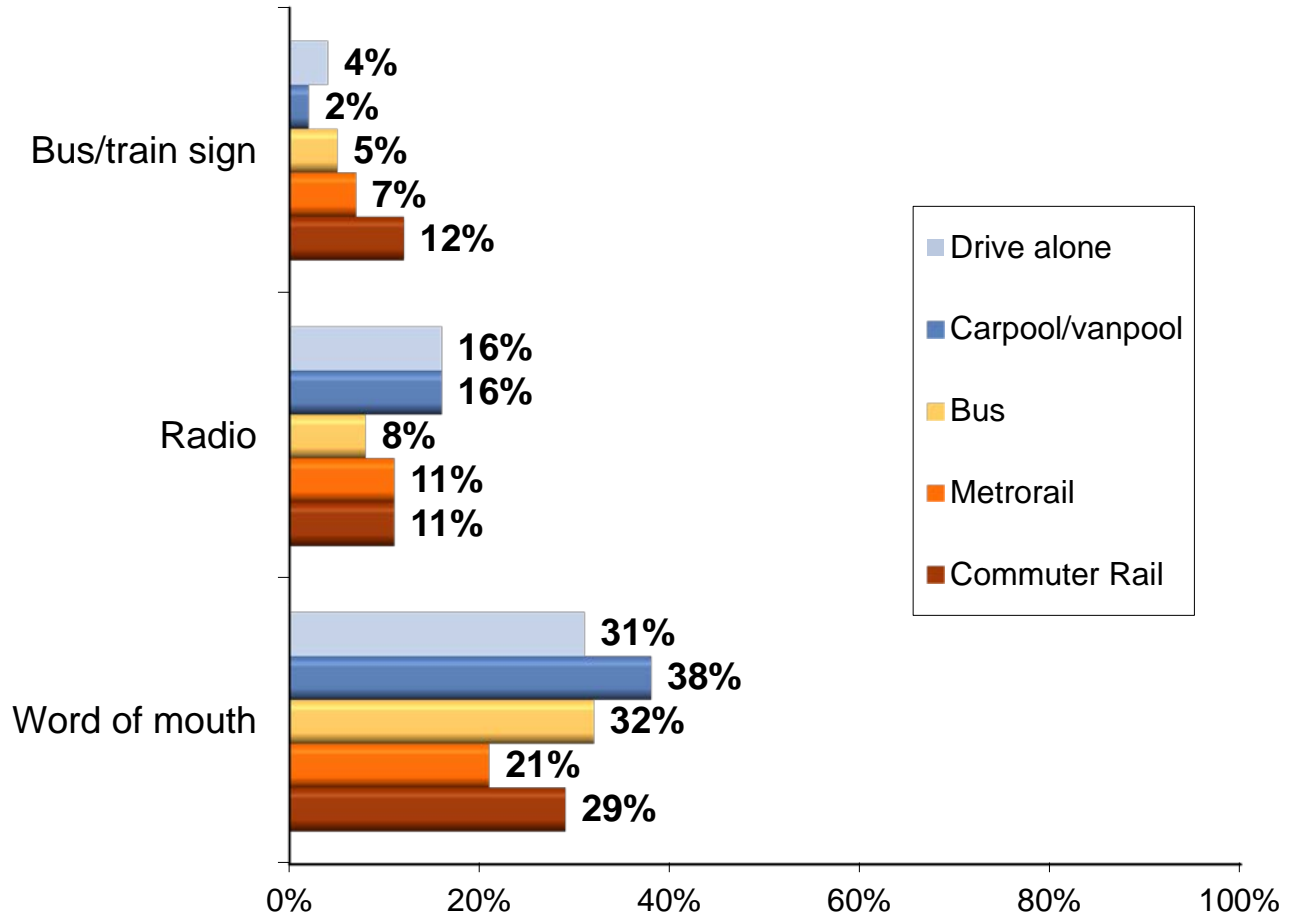
2010
n = 999

2013
n = 2,374

Q49 How did you hear about the GRH Program?

Source of GRH Information Varies by Mode

Word of mouth is top source for all participants, but drive alone registrants and carpoolers also noted radio. Transit riders named sign on bus/train or in train station



Pre-GRH Mode

Drive alone
n = 537

Carpool / vanpool
n = 266

Bus
n = 449

Metrorail
n = 312

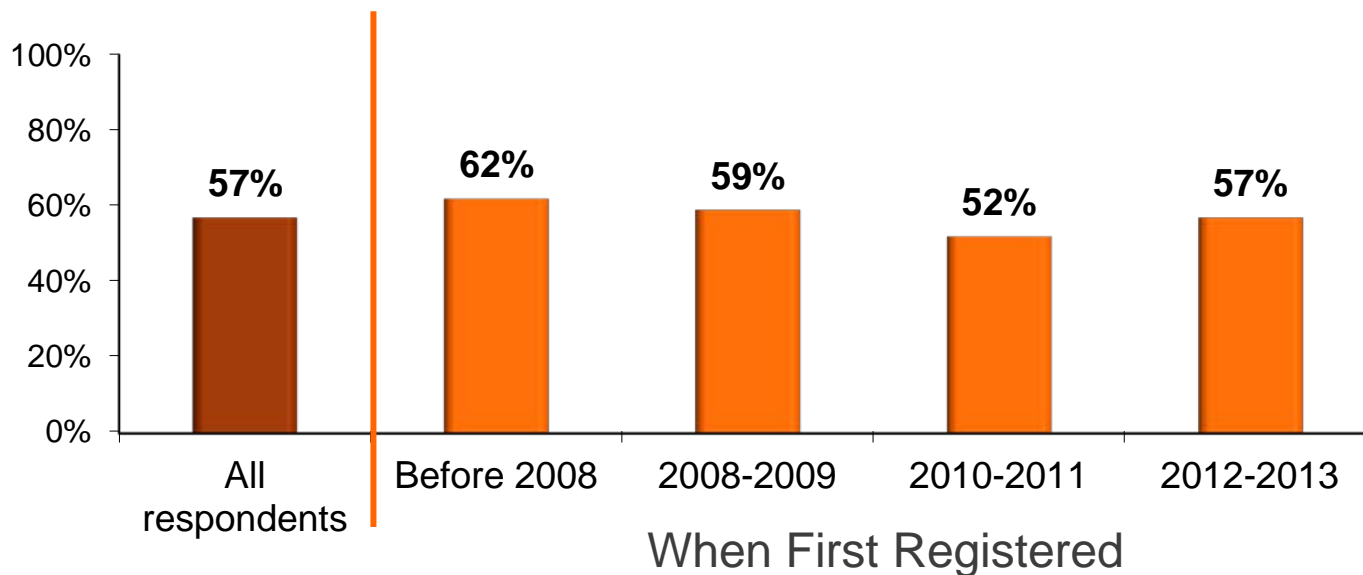
Commuter rail
n = 403

Q49 How did you hear about the GRH Program?

Q29 And before you registered for GRH, how did you get to work?

57% of All Participants Heard or Saw GRH Ads

Respondents who registered before 2008 are more likely to have seen or heard GRH ads – 62% recalled ads, compared to 59% of respondents who registered between 2008 and 2009 and 52% who registered between 2010 and 2011; But recent registrants cite ads at a higher rate



All
Respondents
n = 2,374

Before 2008
n = 757

2008-2009
n = 402

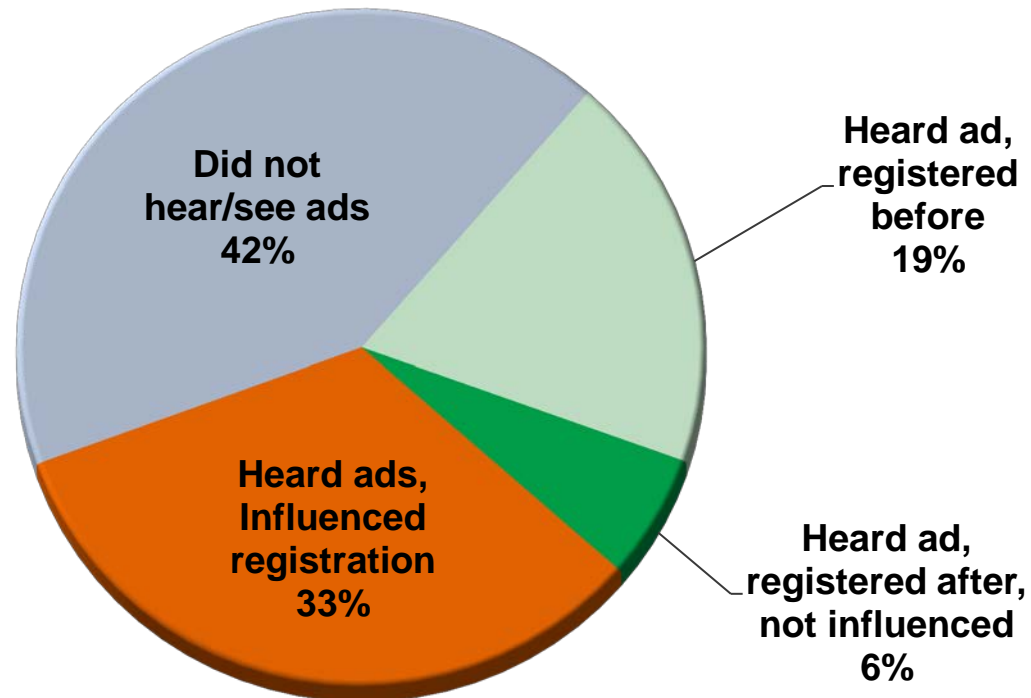
2010 – 2011
n = 476

2012-2013
n = 310

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

33% of 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 ad (19%), or were not influenced by the ad (6%)



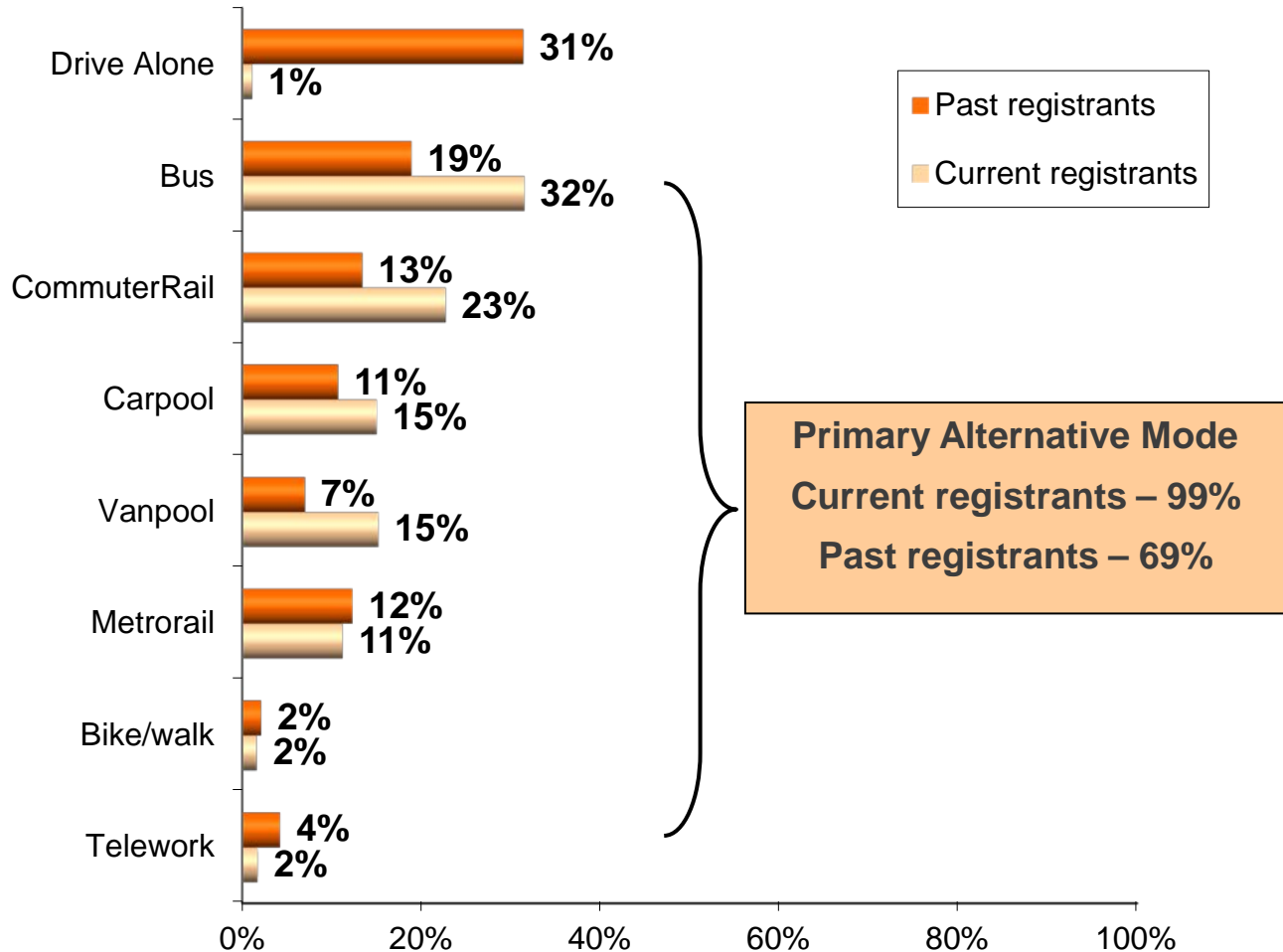


GRH Commute Patterns and Changes



Primary Mode – Current and Past Registrants

99% of current registrants use an alternative mode as their primary mode; but 69% of **past** registrants also still use alt modes



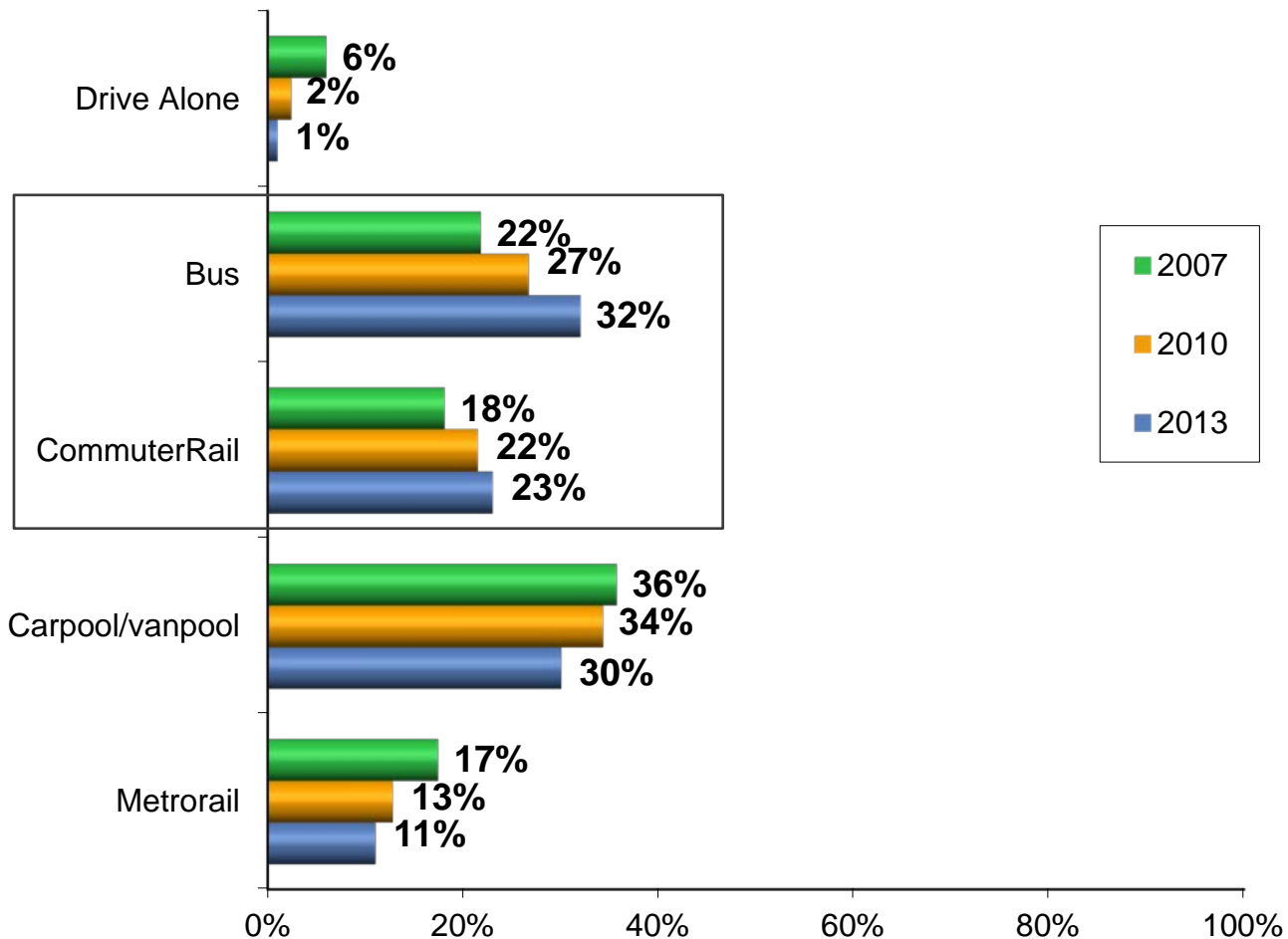
Current registrants
n = 1,773

Past registrants
n = 598

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

Bus and Commuter Rail Account for a Larger Share of Current Mode Use vs 2010 and 2007

Carpool / Vanpool and Metrorail have Lower Use than in 2010 / 2007



2013
n = 1,773

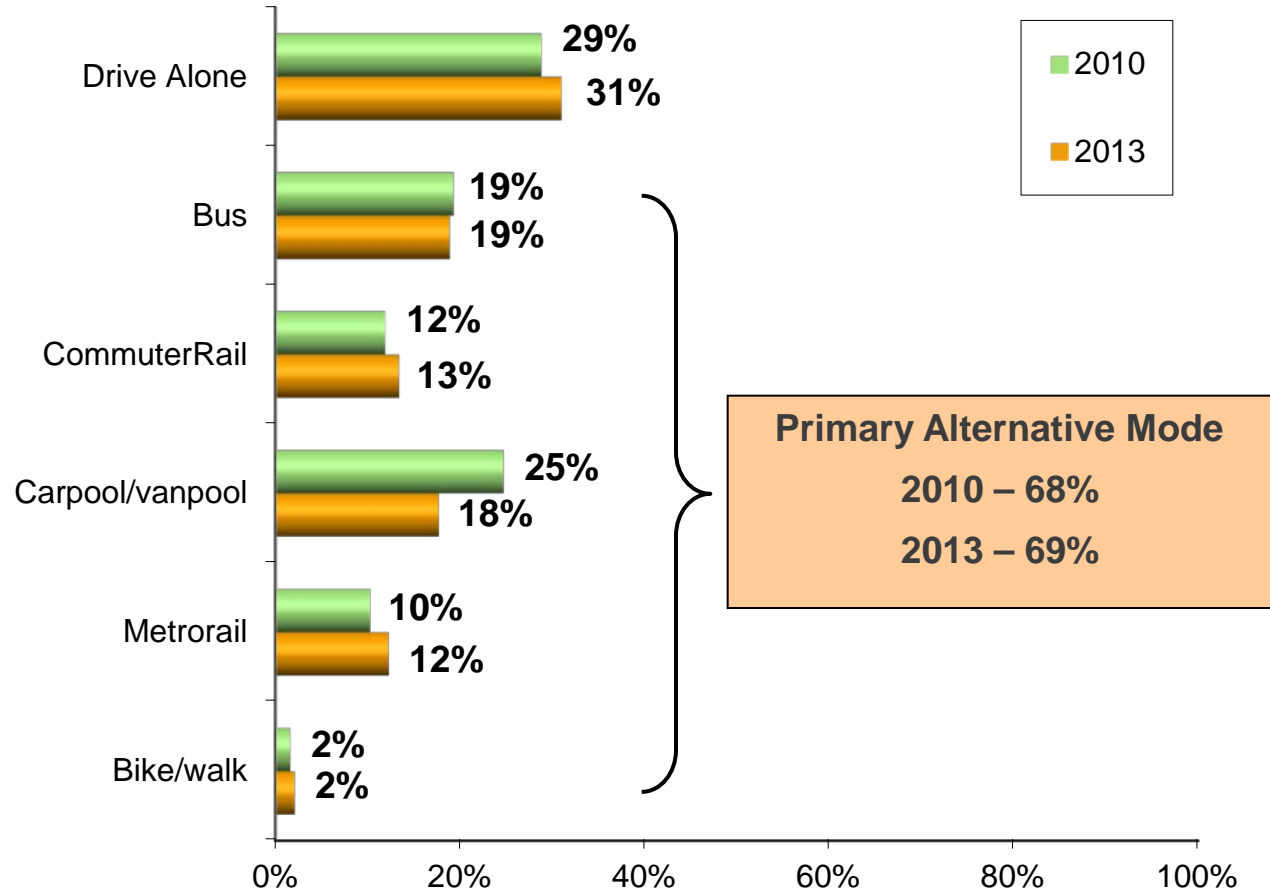
2010
n = 788

2007
n = 935

Chart excludes
telework primary
mode

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

In 2013, 69% of Past Registrants were Still Using Alternative Modes, Essentially the Same as the 68% in 2010



2013
n = 598

2010
n = 250

Chart excludes telework primary mode

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



GRH Research Questions:

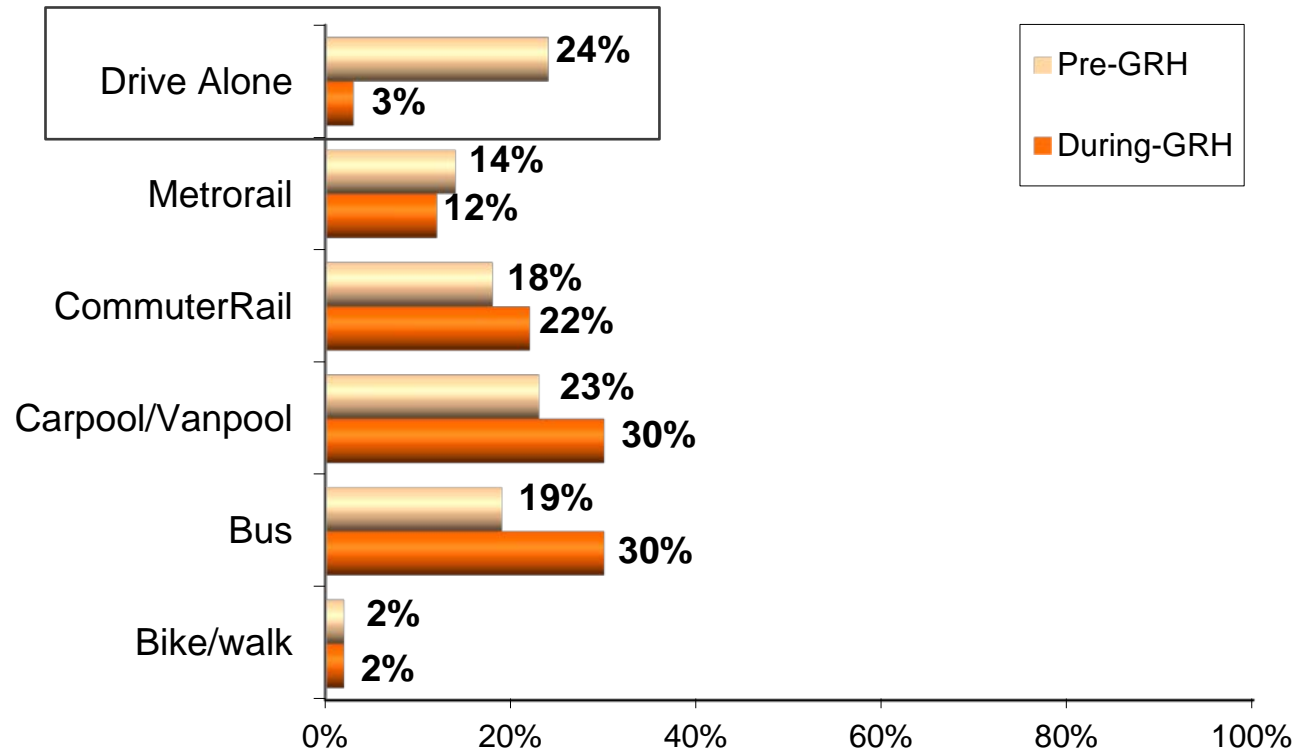
Did GRH:

- Encourage shifts from SOV to alt modes?
- Encourage more frequent use of alt modes?
- Extend duration of alt mode use?

How important was GRH relative to other factors in influencing shifts?

24% Drove Alone Pre-GRH; 3% Drove Alone During-GRH

Mode share for most alt modes increased from Pre-GRH to During GRH; CP/VP increased from 23% to 30%, bus use rose from 19% to 30%, and commuter rail grew from 18% to 22%



During GRH
n = 2,374

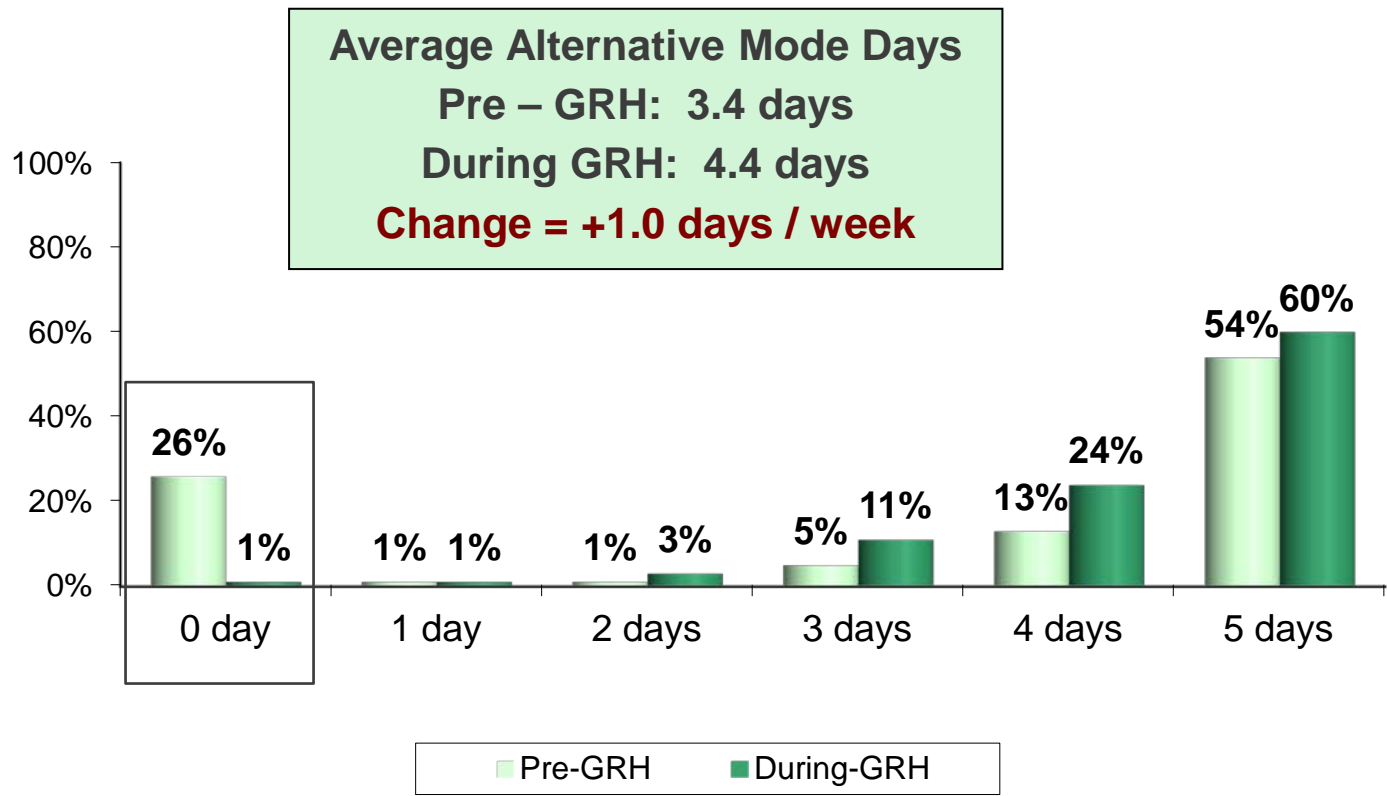
Pre GRH
n = 2,261

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 Alt Mode Days Increased from 3.4 Days per Week to 4.4 Days per Week

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



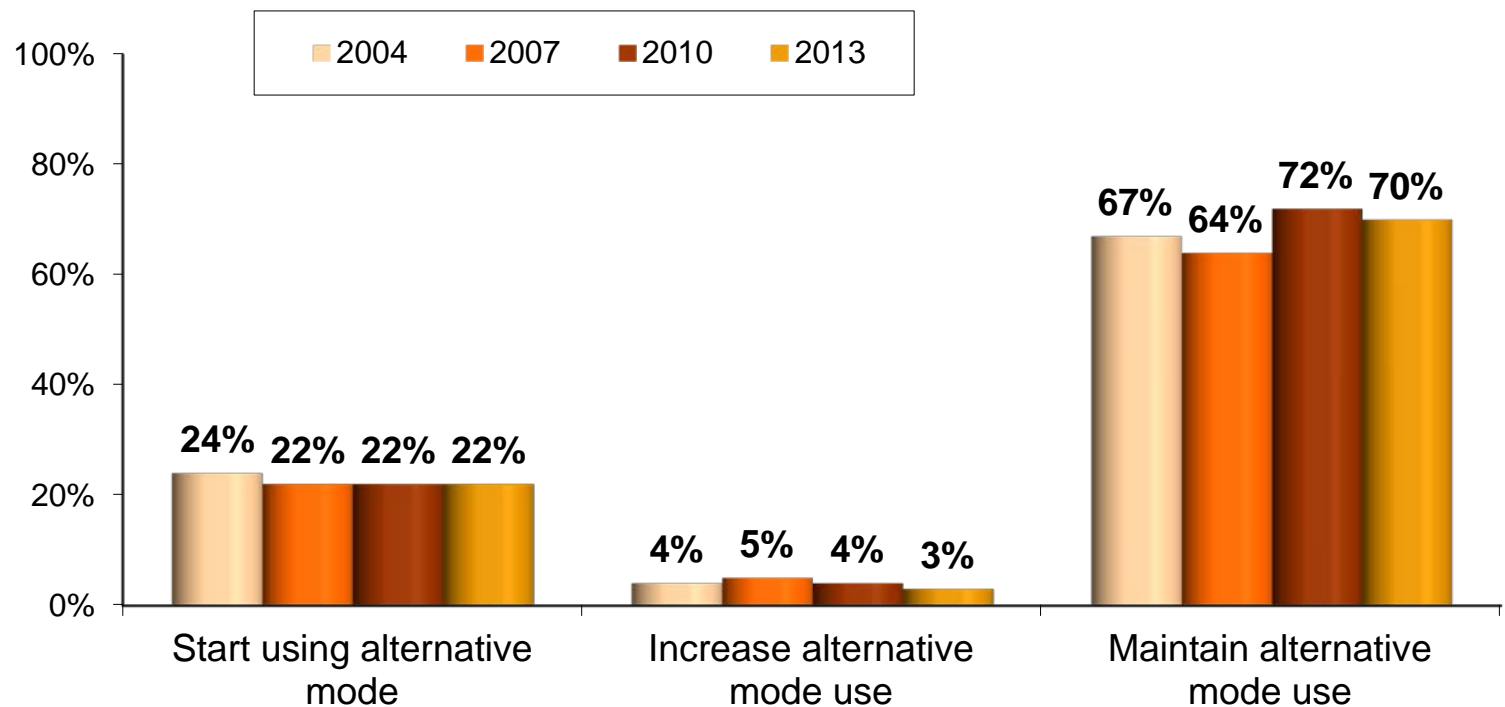
During GRH
n = 2,374

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 2013, 24% of GRH Registrants Started Using Alt Modes and 3% Increased Alt Modes After Joining

The proportions of alt mode changes have been consistent since 2004



2004
n = 981

2007
n = 918

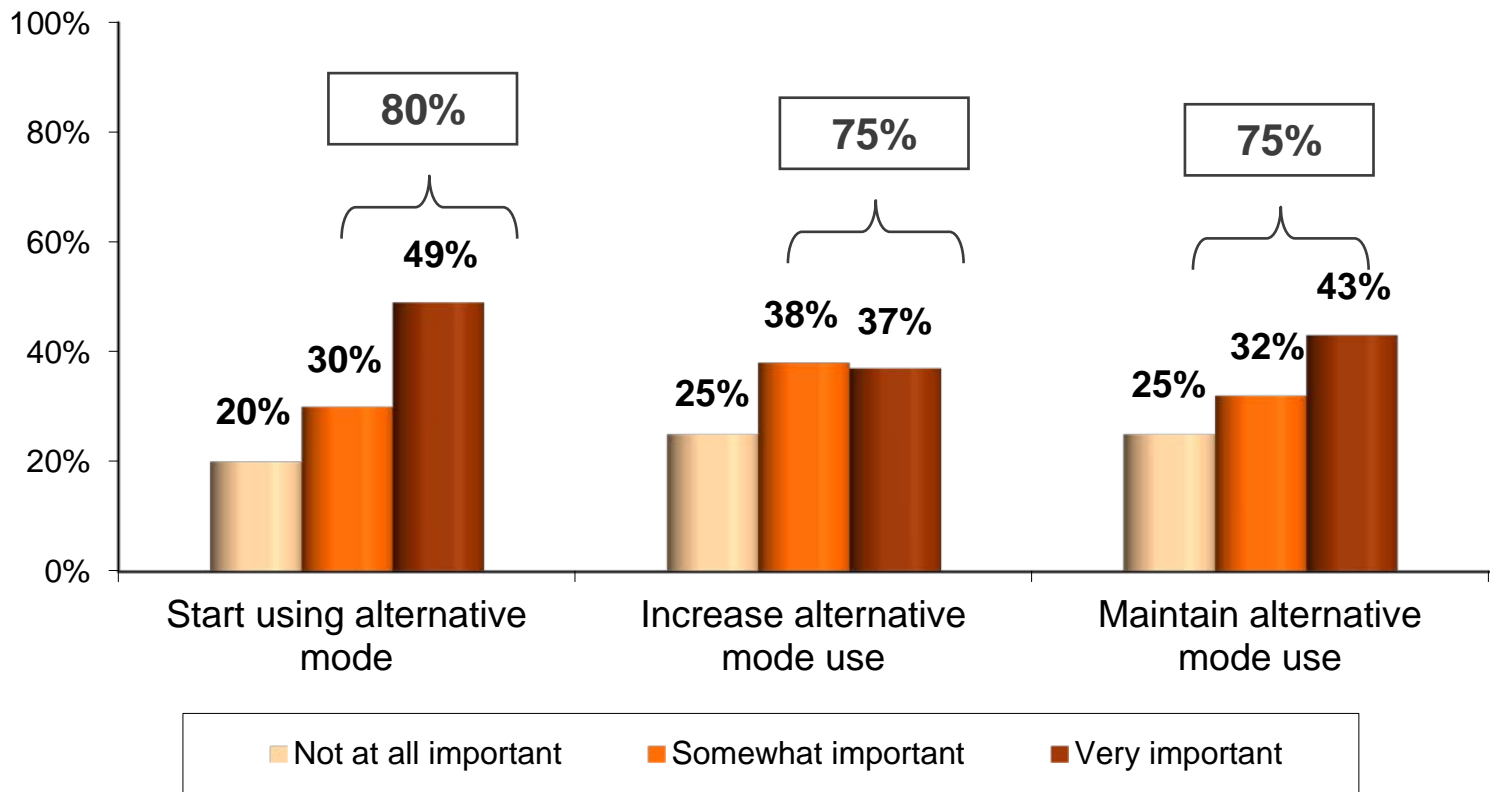
2010
n = 972

2013
n = 2,374

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

About 8 in 10 Respondents said GRH was “Somewhat” or “Very” Important to Decisions to Start a New Alternative Mode

Similar results were noted for decisions to increase or continue / maintain use of an existing alternative mode



Start alt mode
n = 479

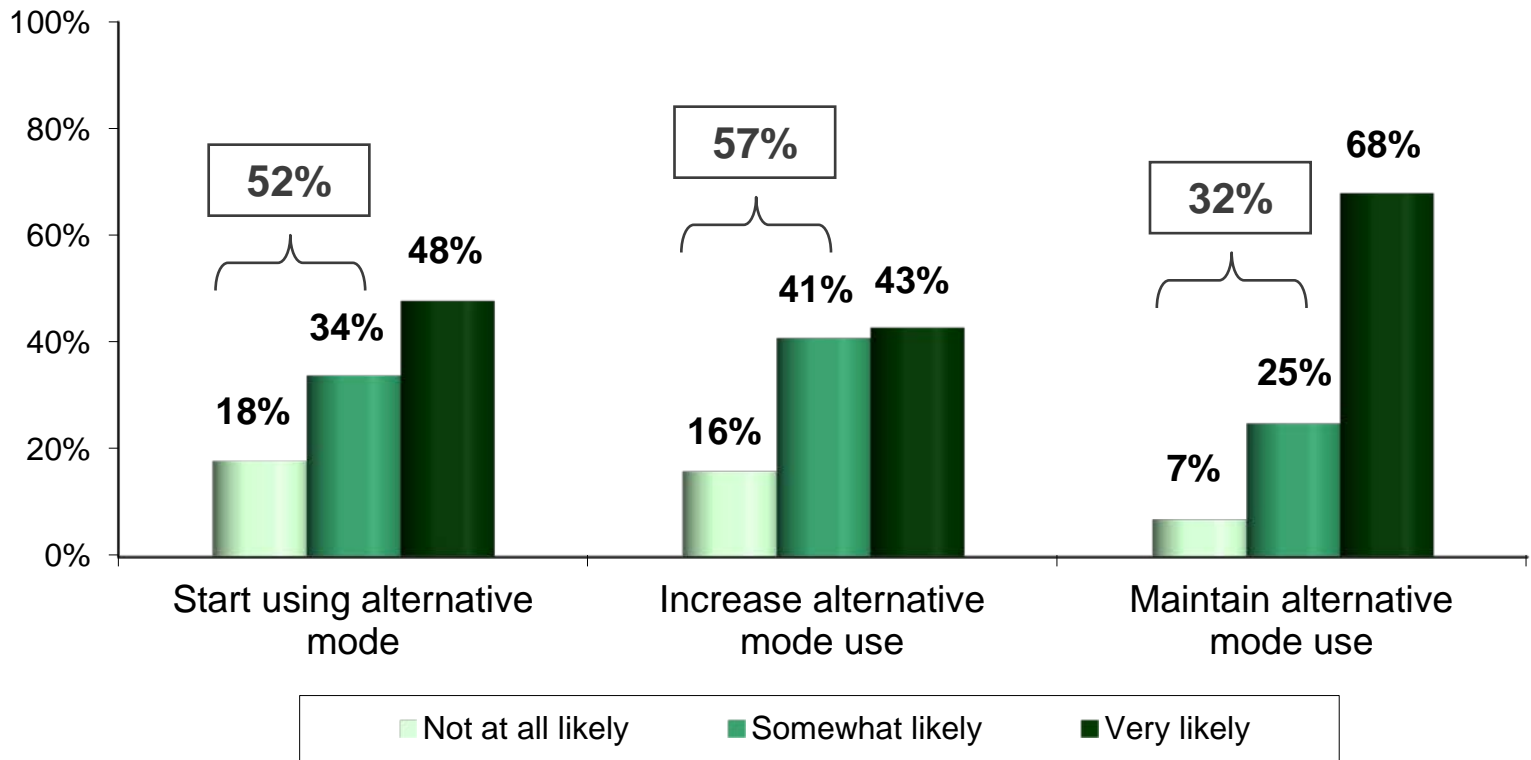
Increase alt mode
n = 70

Maintain alt mode
n = 1,606

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

Half of Respondents who Started or Increased Alt Mode Use said they 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 = 464

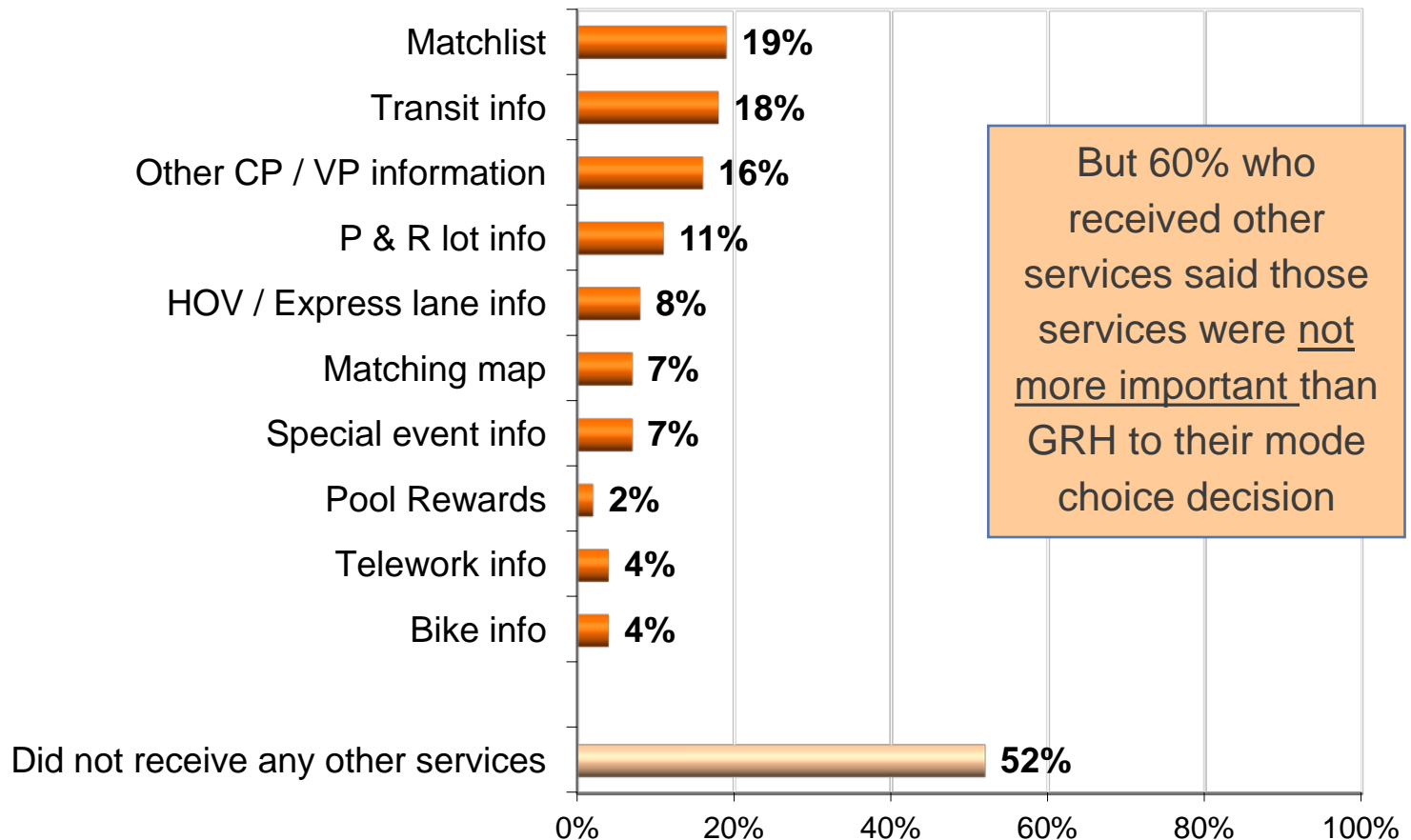
Increase alt mode
n = 66

Maintain alt mode
n = 1,572

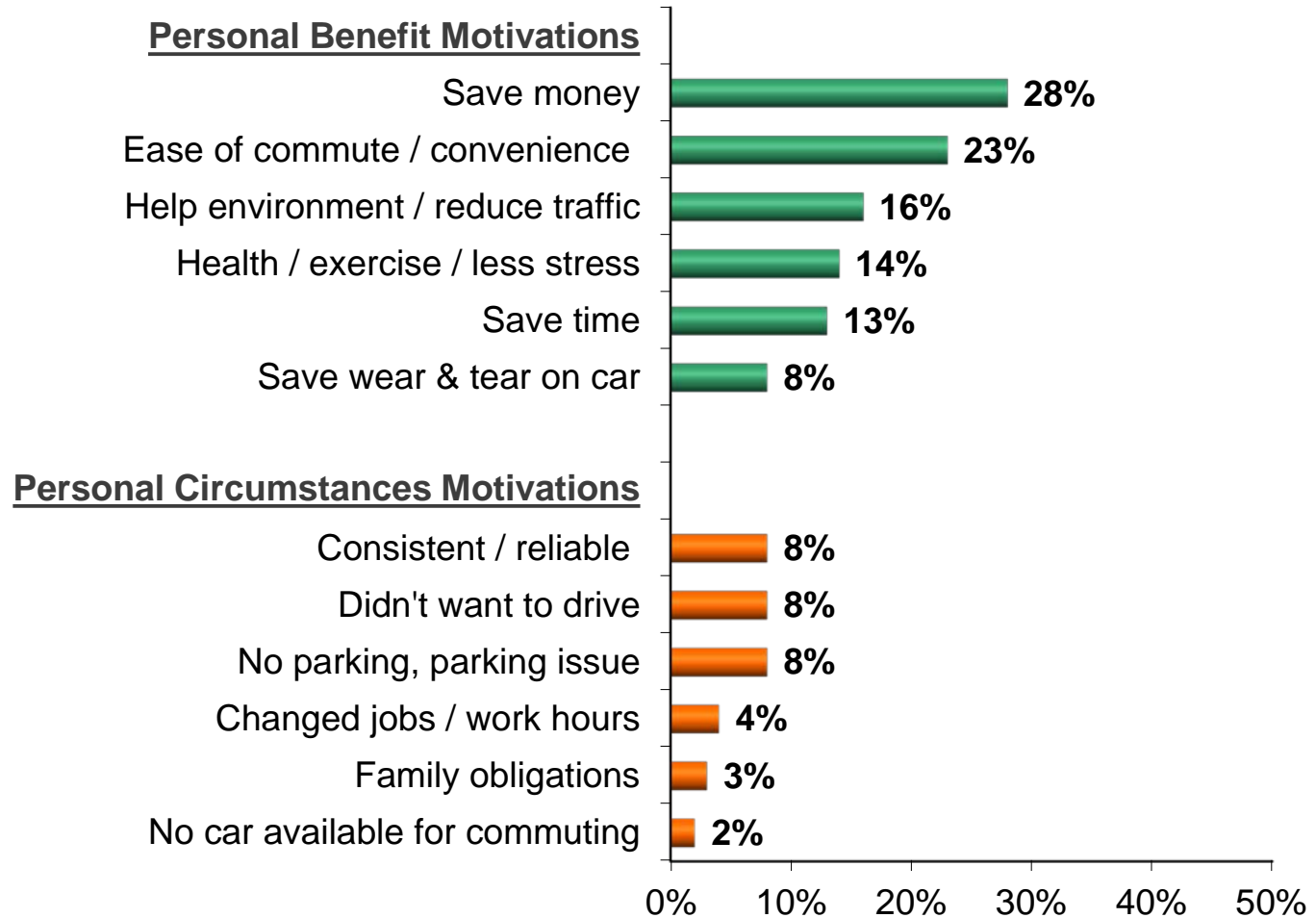
Q33/Q34/Q32 If GRH had not been available, how likely would you have been to (start, increase, continue) <mode>?

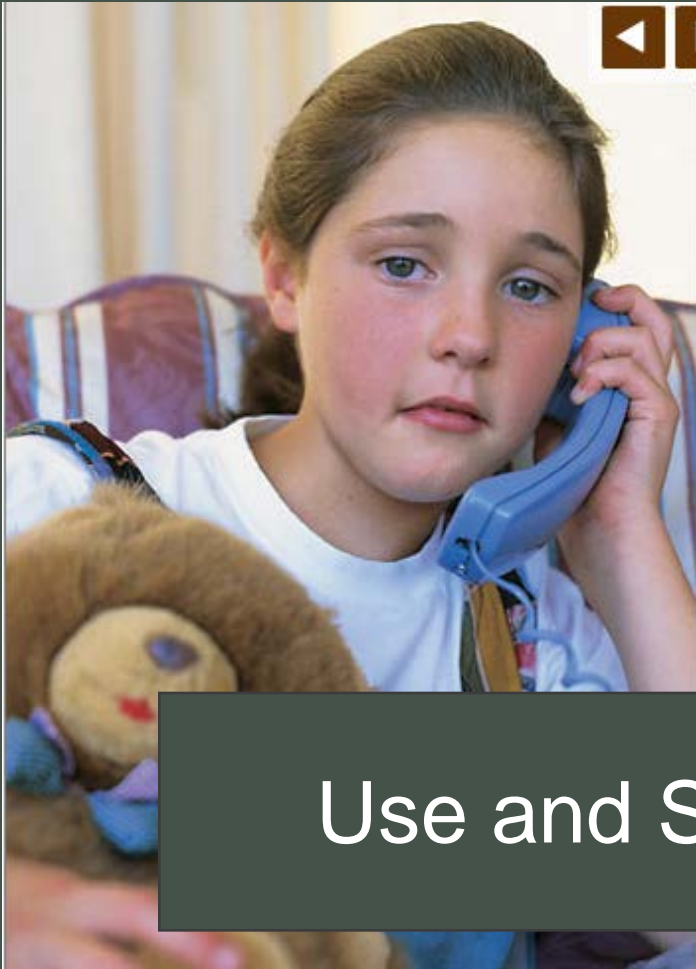
Nearly Half of GRH Registrants Received Some Other Services from Commuter Connections

Most common other services – matchlist, transit info, and other CP/VP information



50% of Respondents who Made a Change Cited Other Factors that Influenced their Decisions



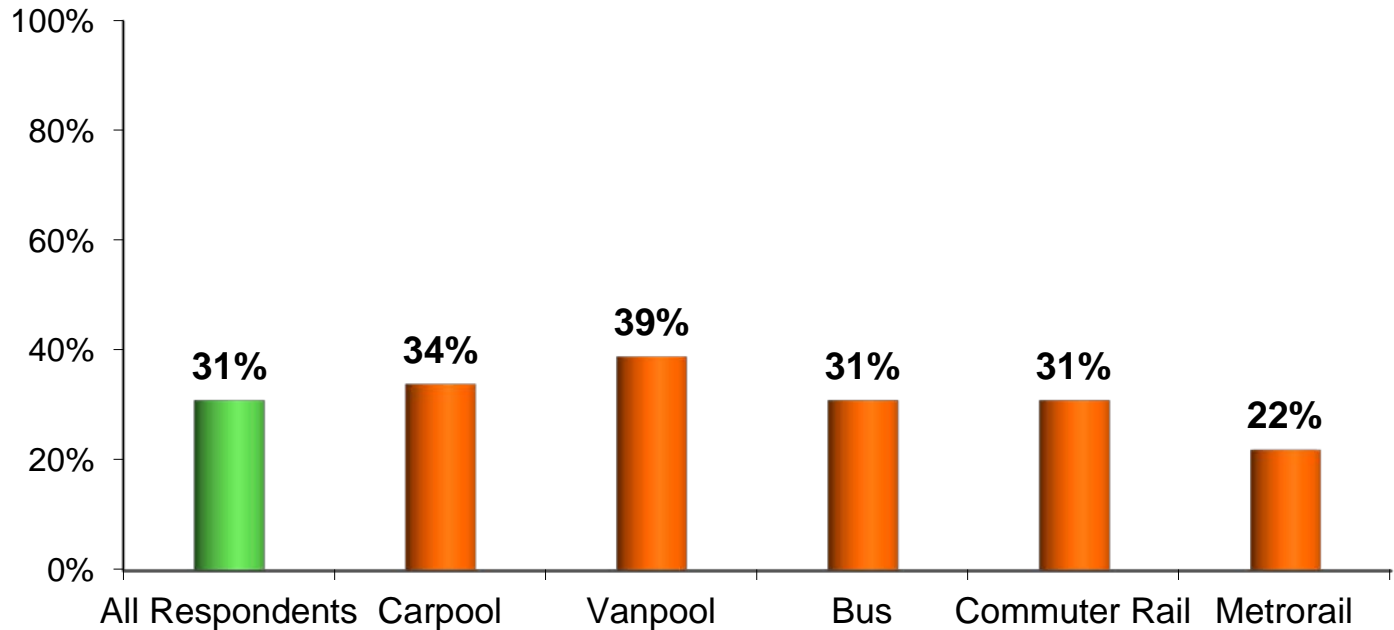


Use and Satisfaction



Three in Ten GRH Registrants Made a Trip

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



All respondents
n = 2,345

Mode During GRH

Carpool
n = 360

vanpool
n = 334

Bus
n = 703

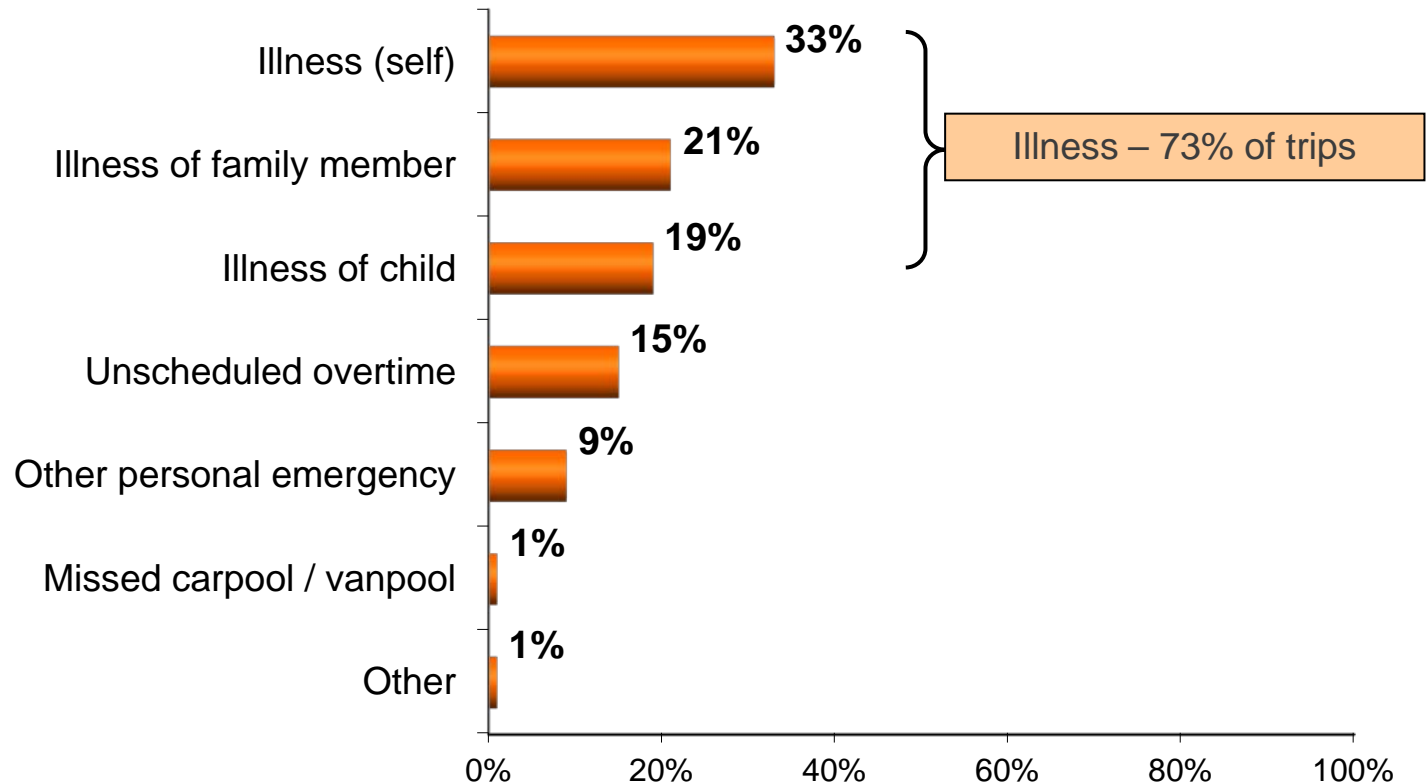
Commuter rail n =
533

Metrorail
n = 283

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

73% of GRH Trips were Taken To Address an Illness; 15% for Unscheduled Overtime

Respondents waited on average 17 minutes for the taxi to arrive; 93% of respondents who used a trip said they were satisfied





Questions?

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