

Transportation Demand Management Report

WestGroup Marketing Research

Executive Summary

April 2009

This report presents the results of a telephone survey of employed residents between the ages of 18 and 55 who live in Maricopa County conducted by WestGroup Marketing Research, Inc. The purpose of the telephone survey is to assess participation in, and reactions to, the Trip Reduction Program and Transportation Demand Management for Valley Metro. **Transportation Demand Management (TDM)** refers to various strategies that change travel behavior (how, when and where people travel) in order to increase a transportation system's efficiency and achieve specific planning objectives. TDM strategies encourage more efficient travel patterns, such as shifts from peak to off-peak periods, from automobile to alternative modes, non-travel alternatives and from dispersed to closer destinations. The study was conducted in partnership with Valley Metro, Maricopa Association of Governments, and Maricopa County.

The interviews were conducted during March and April 2009. Results are based on 400 telephone interviews conducted with 194 male and 206 female respondents who work a minimum of 32 hours per week and live in Metro Phoenix area. The survey took approximately 12 minutes to complete. The total sample has a margin of error of $\pm 5.0\%$. It is important to note that the average price for gas in April 2009 was approximately \$1.85/gallon, notably lower than the \$3.41/gallon Phoenix-metro area residents were paying in April 2008 and the \$2.48/gallon in April 2007. It is certainly likely that this significant decrease in the price of gas directly impacted study results.

Major Issues Facing the Valley

- In 2009, one in five employed residents (21%, respectively) mention an air quality/ transportation-related issue as being one of the most important issues facing the Valley. This represents a significant decrease from last year and continues a downward trend in the percentage of residents voicing their concern over air quality/ transportation issues (40% in 2008 among employed residents, 61% in 2007 and 70% in 2000 among the general population).
- Outside of air quality/transportation issues, the most important issue for employed Valley residents in 2009 is the economy and unemployment (65% total mentions). Affordable housing (26%), education (22%), and illegal immigration (20%) round out the top four mentions.
- When asked specifically to think about traffic congestion, 92% of employed residents indicate traffic congestion is a problem in the Phoenix-metropolitan area (big + moderate ratings).

- Approximately two in five employed residents (41%) feel traffic congestion is a problem for them personally during their commute to work; significantly lower than the 54% reported last year.

Advertising Awareness

- More than one-half of employed residents (56%) recall seeing or hearing some type of advertising for Valley Metro; this is significantly higher than the 48% measured in 2008.
- Similar to last year, those aware of Valley Metro advertising are most likely to report seeing TV ads, hearing ads on the radio and seeing ads on buses (48%, 20% and 15%).
- Six percent (6%) of those recalling advertising for Valley Metro report seeing advertising at the workplace.
- Two in three (66%) employed residents recall seeing or hearing news stories about Valley Metro services or transit services in general. This represents a significant increase compared to last year (up 27 percentage points).
- Although 38% of those aware of advertising could not recall any details of the messages, more than three-fifths remember a variety of different messages. This year, they are most likely to recall messages relating to the light rail: messages promoting the light rail in general (28%), as well as information about light rail safety (2%), and the ability to ride the light rail for free during its opening (1%).
- Approximately nine in ten (89%) employed residents aware of Valley Metro advertising hold a favorable opinion of advertisements that encourage alternatives to driving alone; significantly higher than the 84% measured in 2008.
- Nine in ten residents (89%) say they recall seeing or hearing information about high pollution advisories in the past six months. Compared to last year, this represents a ten-point increase in recall of HPA's.
- Approximately two in five (41%) report taking some form of action in response to hearing about the high pollution warning (NET responses). Seven-percent (7%) of employees report responding to the high pollution advisories by using an alternate mode of transportation; this is down slightly from 10% in 2008.
- Similar to last year, the vast majority of those who heard about high pollution advisories at their workplace say HPA information was communicated via email (86%; up slightly from 84% in 2008).

Commuting Behavior

- The percentage of employees using traditional alternate modes of transportation (i.e., bus, bike, light rail, walk, carpool, or vanpool) dropped after the significant increase observed in

2008 (24% down from 34%).

- Total alternate mode usage including telecommuting and compressed schedules also decreased in comparison to 2008, but not as dramatically as the use of traditional modes only (54% to 46%).
- The percentage of employees reporting to use any of the traditional alternate modes returned to levels reported prior to 2008. However, the percentage reporting to telecommute remained at a higher level and is only two points lower than in 2008 (18% vs. 20% in 2008); there is actually an increase in the percentage of those reporting to work a compressed work schedule (14% up from 12%).
- The percent of alternate mode trips using traditional alternate modes decreased to 18%, down from 26% in 2008 and 20% in 2007.
- The percent of total trips made using alternate modes, or not made because of telecommuting and compressed work weeks, also declined in comparison to last year and returned to pre-2008 levels (34% down to 27%).
- Despite a lower percentage of employees reporting to carpool and/or vanpool, the frequency of ride sharing during the week did increase (3.3 days per week up from 3.1 days).
- There is an increase in the percent of employees reporting to drive alone five or more days a week (71% up from 65%). However, the percent of employees reporting to carpool five or more days a week also increased (37% up from 35%), with 33% reporting they carpool or vanpool to work five days a week (up from 21% in 2008).
- The average frequency of all of the alternate modes increased in comparison to 2008 with the exception of telecommuting. This means that although fewer employees are using alternate commute modes this year, those who are using alternate modes increased the frequency of using those modes.
- Both traditional and total alternate mode usage in 2009 are slightly higher among small organizations employees (23% vs. 26% for traditional modes and 45% vs. 48% for all alternate modes). Both of these results reflect a significant decrease in alternate mode usage in comparison to 2008.

Perspectives on Alternative Mode Usage

- Full time employees who use alternate modes most often indicate that convenience and/or saving gas money are the primary motivations for using those modes of transportation for their commute (44% and 24%).
- On average, carpoolers report having two or three passengers in their carpool or vanpool (average 2.9). This is significantly higher than the average measured in the previous two years (average 2.5 in 2008 and 2007).

- Employees are most likely to report that they would go through their work place to find a carpool partner (47%); this percentage is slightly higher compared to the previous two years (41% in 2008 and 42% in 2007).
- Approximately one-third (34%) of full time employed residents report awareness of the Valley Metro online carpool matching system. This percentage is just slightly lower than last year's all time highest awareness level of 37%.
- Approximately two in seven employees who do not currently carpool indicate they are at least somewhat likely to consider carpooling in the future (4% very likely and 23% somewhat likely). Less than one in five non-vanpoolers express interest in vanpooling (4% very likely and 15% somewhat likely).
- Similar to last year, the two primary reasons commuters are willing to consider carpooling or vanpooling is to save money and/or to help the environment.
- The primary reasons employees are unlikely to consider carpooling or vanpooling are they believe their schedule is too unpredictable or varied to allow carpooling (mentioned by 36% as a barrier to carpooling and 25% as a barrier to vanpooling) or they need their vehicle for work-related tasks (e.g., traveling during the day, carrying equipment, etc., mentioned by 18% in regard to carpooling and 17% in regard to vanpooling).
- Four in nine employed residents not currently car or vanpooling appears to find the incentive of a customized match of commute partners to their work site appealing (44% somewhat + very likely consider car/vanpools). Slightly fewer, 39% seem to find the incentive of free gasoline appealing. This represents a significant decrease from last year when approximately one-half found these incentives appealing (53% for the matching system and 48% for free gas).
- Approximately one-fourth of employed residents indicate they are likely to consider taking the light rail system to work (23% very + somewhat likely). Interestingly, now that light rail is available, the percentage indicating they are likely to use the train to commute to work is significantly lower than last year (34% in 2008).
- The primary reasons commuters are willing to consider taking the light rail to work is to save money (13%), to help the environment (7%), and to avoid driving all the time (6%).
- The vast majority of employed residents that report they are unlikely to consider taking the light rail to work indicate that they are simply not interested because they would prefer to drive their own car (83%).

Factors Affecting Commute Behavior

- This year, there is a significant increase in the percentage of employed residents indicating they hold a favorable perception of public transit; more than two in three employees indicate their perception of public transit in the Valley is "very" or "somewhat" favorable (68%; up from 58% in 2008).

- As in the past, employees indicate they would be able to consider using an alternate mode of travel if there were better transit service (36%) and/or they were able to find someone to carpool with (10%).
- Employed residents who do not ride the bus most often state it is because there is a lack of service in the area they need (33%).
- More than one-half of full time employed residents report riding a bicycle (52%; up slightly from 48% in 2008).
- When bike riders that do not typically ride their bike to work were asked how likely they would be to ride their bike to a bus/light rail stop and then take their bike with them onto the bus or light rail, one in eight (13%) indicate being likely to ride their bike to a stop and then taking it along with them.
- More than one-third (34%) of full time Valley employees report working for a company that has a designated transportation coordinator.
- More than one-half (54%) indicate their company offers resources containing information about using alternate modes. However, most of those reporting availability of information are employees from larger companies (71% vs. 26%).
- When asked about the types of alternate mode information they would like to have available at their work site, employees are most likely to indicate a desire for information on carpooling and vanpooling (8% and 6%) as well as bus schedule and route information (8%).
- More than one-half of full time employees report their employer has encouraged them to use an alternate mode for their commute to work (51%); this is slightly higher than the 46% measured last year.
- As in the past, incentives and/or rewards for alternate mode usage are the most commonly suggested means for employers to encourage alternate mode usage (mentioned by 19%).
- Park & Ride facilities have been used by approximately one-fourth of the employed residents at some time in the past (23% up slightly from 19% in 2008).
- Similar to previous years, those who have used a Park & Ride facility most often cite downtown Phoenix as a transit destination served from their local lot (40%).
- Among those who have not used a Park & Ride facility, more than one-third report being at least somewhat likely to consider using such a facility if it was located near their home (10% “very likely” + 25% “somewhat likely”).

- Nearly half (48%) of full time Valley employees report making a change to their driving habits in response to increased gas prices. This represents a significantly lower percentage than in 2008, likely due to the decrease in gas prices from last year. Like previous years, the most common response taken is to make fewer trips (20%) or to combine trips (14%).

Internet Access, Usage & Impact

- In 2009, 97% of Valley residents employed full time between the ages of 18 and 55 report having access to the Internet either at home (94%) or at work (85%). The overall access percentage continued to increase this year (up 5 percentage points) as did the specific “at home” and “at work” percentages (home access: up 7 points and work access: up 6 points).
- Approximately one-half of those employed full time can access their work computer from home (49%); this percentage is slightly higher than the 46% measured last year and continues to rise each year.

Conclusions

1. As expected, concerns about the economy and unemployment completely overshadow concerns about air quality and transportation-related issues. Currently, affordable housing, education and illegal immigration all are cited with the same frequency as the net total for all concerns about air quality and transportation issues. It is likely, therefore, that the concerns about these other issues, particularly the economy and unemployment, can be expected to have an influence on commute perceptions and behavior.
2. For the second year in a row, awareness of advertising for Valley Metro increased over the awareness measured in the 2007 Regional Market study (41% in the Regional Market study; 48% in 2008, and 56% currently). Last year advertising recall focused more on carpooling rather than light rail, however, this year the focus returned to messages and news stories about Metro light rail. It is also important to note that in addition to the increase in awareness of Valley Metro advertising and news stories there has also been an increase in the percent of employed residents with a favorable opinion about advertising for alternate mode usage as well as of public transit in the Valley; this points to an overall positive shift for the image of Valley Metro in the market.
3. As suspected, the historically high gas prices in 2008 led to a dramatic increase in the percentage of employed residents turning to alternate modes in an attempt to save money on gas. However, with gas prices more than \$1.50 per gallon lower than 2008, the usage of most alternate modes returned to the levels reported in earlier years. There were two notable exceptions to this trend – telecommuting and compressed work weeks. The fact that the usage of these two non-trip commute strategies did not decrease like the usage of the traditional alternate modes appears to confirm that there continues to be an increased willingness by employers to allow their employees to telecommute and/or work a shortened work week to help reduce expenses not only for the organization but also for

the employees.

4. Although the overall percentage of employed residents reporting to carpool/vanpool to work decreased in comparison to last year, there was an increase in frequency of usage for this mode with close to two in five ridesharing employees using it five or more days a week. It is possible that while the higher gas prices led some employed residents to try ride sharing for a short time, it may have been the impetus behind other employed residents making the change to daily rather than “occasional” carpoolers/ vanpoolers. In fact, this may be the case for many alternate mode users since the frequency of use of all modes increased over last year.
5. As anticipated because of the increased concern over the economy and unemployment, current alternate mode users are most likely to indicate that convenience and cost are the two primary motivations behind alternate mode usage. Saving money and helping the environment continue to be the primary reasons non-carpoolers or vanpoolers would consider this commute option.
6. Employed residents continue to indicate that should they want to consider using an alternate mode for their commute, they are most likely to look for assistance at the work site. In addition, a notable portion of these non-users indicate they would be motivated to carpool or vanpool if they had access to a way to find a customize match with a commute partner. Once again, it is important for Valley Metro to encourage employers to publicize its online carpool matching system.
7. Finally, the fact that two-thirds of employed residents ages 18 to 55 live in one city and work in another reinforces the need for a coordinated, regional transit system that allows residents to seamlessly travel throughout the Metro area.