

Executive Summary

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 for Valley Metro. The study was conducted in partnership with Valley Metro, Maricopa Association of Governments, and Maricopa County.

The interviews were conducted during April and May 2008. Results are based on 402 telephone interviews conducted with 221 male and 181 female respondents living in Metro-Phoenix and who work a minimum of 32 hours a week. The survey took approximately 12 minutes to complete. The total sample has a margin of error of $\pm 4.9\%$. It is important to note that the average price for gas in April 2007 were at \$2.48 per gallon compared to almost one dollar higher in April 2008 at \$3.41. It is certainly likely that this significant increase in the price of gas directly impacted study results.

Major Issues Facing the Valley

- In 2008, two in five employed residents (40%) mention an air quality/transportation-related issue as being one of the most important issues facing the Valley. Compared to the general population in prior years, this represents a significant decrease in the concern voiced over air quality/ transportation issues (61% in 2007 and 70% in 2000 among all residents).
- Outside of air quality/transportation issues, the most important issues for employed Valley residents in 2008 are the economy and unemployment (31% total mentions) and illegal aliens/immigrants (29%).
- 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).
- Just over one-half (54%) of employed residents feel traffic congestion is a problem for them personally during their commute to work. Fewer than one in four (23%) rate it as a “big” problem.

Advertising Awareness

- Nearly one-half of employed residents (48%) recall seeing or hearing some type of advertising for Valley Metro. Those aware of advertising are most likely to report seeing TV ads, ads on buses, and hearing ads on the radio (41%, 26% and 15%).
- Twelve percent (12%) of those who recall advertising for Valley Metro report seeing advertising at the workplace.



- Nearly two in five (39%) employed residents recall seeing or hearing news stories about Valley Metro services or transit services in general.
- Although 45% of those aware of advertising could not recall any details of the messages, more than one-half remember a variety of different messages. They are most likely to recall messages promoting carpooling (16%), light rail information (6%), and general “Valley Metro” information (6%).
- Approximately five in six (84%) employed residents aware of Valley Metro advertising hold a favorable opinion of advertisements that encourage alternatives to driving alone.
- Nearly four in five employed residents (79%) say they recall seeing or hearing information about high pollution advisories in the past six months. The majority recalls hearing about the HPA on television (49%).
- Approximately two in five (41%) report taking some form of action in response to hearing about the high pollution warning. The most common action taken is to stay inside more (19%) on HPA days, followed by driving less (8%). One in ten employees reports responding to the high pollution advisories by using an alternate mode of transportation (up from 4% in 2007).
- The vast majority of those who heard about high pollution advisories at their workplace say HPA information was communicated via email (84%).

Commuting Behavior

- The percentage of employees using traditional alternate modes of transportation (i.e., bus, bike, walk, carpool, or vanpool) increased dramatically compared to 2007, and is at the highest level since this measure has been tracked – 43%.
- Total alternate mode usage including telecommuting and compressed schedules also increased significantly to the highest level ever recorded in this study, with more than half of the employed residents reporting they use some alternate mode at least once a week (56% up from 43%). The increase is due to the large increase in the percentage reporting to use an alternate mode occasionally during the week (42% up from 31%).
- The percent of alternate mode trips using traditional alternate modes increased again in 2008, (up to 26% from 20%).
- The percent of total trips made using alternate modes, or not made because of telecommuting and compressed work weeks, increased eight points over last year (34% from 26%). The increase in alternate mode trips is due primarily to the increase in carpool trips, but also to trips made using the bus or riding a bike and non-trips associated with telecommuting.

- For the second straight year, there has been an increase in both the percent of carpoolers/ vanpoolers (18% to 28%) as well as in the frequency of carpooling (3.0 days to 3.1 days), with a subsequent decrease in the percent of employees reporting to driving alone five or more days a week (71% down to 65%).
- The average usage frequency for all alternate modes increased in comparison to 2007 with the exception of riding a bike.
- Total alternate mode usage in 2008 is the same at both TRP and Non-TRP eligible organizations (both at 56%), however, as in the past, usage of traditional alternate modes is higher at Non-TRP eligible organizations than at TRP-eligible organizations (49% vs. 39%). Both of these results reflect a significant and dramatic increase in alternate mode usage in comparison to 2007.
- Total alternate mode usage, including telecommuting and compressed work schedules, reported by employees working at *TRP-eligible* organizations increased for the third year in a row (44% 2007; 56% 2008).
- There was a substantial increase in alternate mode usage overall among employees at Non-TRP eligible companies (43% to 56%), particularly in the percentage of employees reporting to carpool (19% to 33%) and telecommute (15% to 23%).
- Alternate mode trips account for a higher proportion of all work trips among employees from Non-TRP eligible organizations than among employees from TRP-eligible organizations (36% vs. 33%).
- The percentage of trips associated with alternate modes of transportation, or not made because of telecommuting and compressed work schedules, increased significantly at TRP-eligible companies compared to last year (24% up to 33%). The same is true at non-TRP eligible companies (29% to 36%).

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 (38% and 32%). The percentage of employed residents citing saving money on gas as a motivation for alternate mode usage doubled in comparison to 2007 (16% up to 32%).
- On average, carpoolers reported having two or three passengers in their carpool or vanpool (average 2.5). This is the same as measured in 2007.
- When employees were asked where they might look for a carpool partner if they were interested in carpooling, two in five employees (41%) report they would go through their work place to find a carpool partner. Nearly one in five (18%) indicate they would turn to friends, family members or co-workers.

- More than one-third (37%) of full time employed residents report awareness of the Valley Metro online carpool matching system.
- One-third of employees who do not currently carpool indicate they are at least somewhat likely to consider carpooling in the future (9% very likely and 25% somewhat likely).
- Fewer than one in four non-vanpoolers express interest in vanpooling (6% very likely and 18% somewhat likely).
- The primary reasons commuters are willing to consider carpooling or vanpooling is to save money, to help the environment, and because they have co-workers or friends who would be convenient to share rides with.
- The primary reasons employees are unlikely to consider carpooling or vanpooling are both job-related complications – either they believe their schedule is too unpredictable or varied to allow carpooling (mentioned by 35% as a barrier to carpooling and 29% as a barrier to vanpooling) or they need their vehicle for work-related tasks.
- Approximately one-half of those not currently car or vanpooling appear to find the incentives of free gasoline (48%) and/or a customized match of commute partners to their work site (53%) as appealing (somewhat + very likely to get them to consider car/vanpools).
- One-third of full time employed residents indicate they are likely to consider taking the light rail system to work in the future (34% very + somewhat likely). Nearly one in five (19%) say they are “very likely” to consider light rail for commuting to and from work when it is available.

Factors Affecting Commute Behavior

- Nearly three in five (58%) employed residents hold a favorable perception of public transit with 15% saying their opinion is “very favorable.”
- As in the past, employees indicate they would be able to consider using an alternate mode of travel to get to work if there were better transit service (27%) and/or they were able to find someone to carpool with (18%).
- Reasons most often provided by employed residents for not riding the bus is because it takes too long (23%), there is a lack of service in the area they need (17%), and that bus stops are too far away (16%).

- Nearly one-half (48%) of employed residents say they ride a bicycle, while one in four bike riders (25%) indicate being likely to ride their bike to a bus stop and then take the bike with them onto the bus.
- Nearly one-third (31%) of full time Valley employees report working for a company that has a designated transportation coordinator. As expected, those employed by TRP-eligible organizations are significantly more likely to have one (43% vs. 8% with fewer than 50 employees).
- Two-thirds of employees at TRP-eligible companies (67%) indicate their company offers resources containing information about using alternate modes.
- Employees are most likely to indicate a desire for information on carpooling and vanpooling (13% and 9%). More than one-third responds that they do not have an interest in any such information (36%).
- Nearly one-half of employees report their employer has encouraged them to use an alternate mode for their commute to work (46%). 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 15%).
- One in five employed residents report they have used a Park & Ride facility at some time (19%). Those who have used a Park & Ride facility most often cite downtown Phoenix as a transit destination served from their local lot (27%).
- Among those who have not used a Park & Ride facility, three in eight report being at least somewhat likely to consider using such a facility if it was located near their home (16% “very likely” + 22% “somewhat likely”).
- Two-thirds (65%) of full time Valley employees report making a change to their driving habits in response to increased gas prices. Like last year, the most common response taken is to make fewer trips (25%) or to combine trips (17%).

Internet Access, Usage & Impact

- In 2008, 93% of Valley residents employed full time between the ages of 18 and 55 report having access to the Internet either at home (87%) or at work (79%). Nearly one-half of those employed full time can access to their work computer from home (46%).

Sample Characteristics

- Nearly two thirds of the employed residents interviewed indicate that they work for an organization with 50 or more employees.

- Slightly higher than in 2007, 12% of employed residents report that they work two or more jobs.
- Employed residents are most likely to work in Phoenix (45%). A strong majority of those who live in Phoenix also work in Phoenix (71%). Mesa and Tempe residents are most likely to work in their cities of residence (43% and 33%).
- Three in five (61%) employed residents report working an 8-hour day/5 day a week schedule.
- The average number of miles traveled to work in 2008 is 15.5 miles (compared to 14.4 in 2007 and 12.4 in 2000).
- In 2008, the average commute time for residents remains virtually the same as in 2007—27.6 minutes compared to 27.8 last year. As in 2007, about one-third of commuters report a commute of more than 30 minutes.
- Alternate mode users are male (59%), slightly younger (39.7 compared to 41.3 years on average), and are of a minority ethnic background (28% vs. 22%).

Conclusions

1. Although this year's study was focused on employed residents alone and not the general population in Metro Phoenix overall, it appears that concerns about the economy and illegal immigration have eroded concerns about air quality and transportation-related issues. Certainly part of the shift may be that employees are more likely to be concerned about the top two issues than residents overall, but the findings are consistent with similar questions asked of residents in other studies completed by WestGroup.
2. Awareness of advertising for Valley Metro increased over the awareness measured in the 2007 Regional Market study (41% in the Regional Market study; 48% current study). Also the recalled message of the advertising shifted away from light rail, which dominated all recall in the fall of 2007, to messages about carpooling being most often recalled followed by recall of light rail information. This is likely a reflection of the emphasis on carpooling through television advertising in combination with a comparative decrease in publicity for light rail as construction is completed.
3. Clearly, the most significant finding of the study is the dramatic increase in alternate mode usage, not only in comparison to 2007 but also in comparison to all previous studies in the more than 15 years this annual evaluation has occurred. The most obvious stimulus for the increase in alternate mode usage is the record high prices for gasoline. At the time the interviews were completed, the average cost of gas was \$3.41 (notably almost .70 lower than the price of gas at the time

- of this analysis). This was the first time in US history that the price of gas had exceeded \$3.00 for an extended period of time. This sudden increase in alternate mode usage, particularly in carpooling and telecommuting as well as increased frequency of usage for transit, does show that employees have more options available to them for their commute than they were ready to admit in the past. It is also encouraging to see a substantial jump in telecommuting, which means that not only is it an option for many employees, but it also reflects an increased willingness by employers to allow their employees to telecommute.
4. Work is the source that employees are going to turn to first when looking for a carpool partner, so it will be important for Valley Metro to not only continue publicizing its online carpool match system to the general public, but also to work with employers to make sure they are aware of the availability of the online match system as a tool they can use when they receive requests for information on carpooling.
 5. As in the past, the most significant barriers to carpooling/vanpooling are the perceptions that job-related demands override any potential benefit for using these modes. However, it appears that the monetary incentive of free gas would help to push some employees to reconsider their need to drive alone as would the availability of a customize carpool match – once again reinforcing the need to increase awareness of the online match system.
 6. There was a slight increase in the percentage of employees reporting transit usage for their work commute, but there was a bigger increase in the number of trips made using public transit. This means that there was a bigger gain in frequency of transit usage than in the number of people using it. As in the past, the most significant barrier to transit usage is the perception that it will not get the employee where they need to go in an efficient and effective manner. Interestingly, one in four bike riders indicated they would be likely to consider riding their bike to the bus stop and then using transit for their commute. This is a notable number of commuters, and represents an opportunity to build transit usage. In addition, it appears that awareness of and access to Park and Ride facilities may also boost transit usage.
 7. Interestingly, only three in five employees at TRP-eligible organizations indicate their employer encourages alternate mode usage and only two in five believe their organization has a transportation coordinator. This would seem to indicate a need for a more significant and visible push for alternate mode usage among these larger employers in the Valley.