

RTO Travel and Awareness Survey

January 2011

Prepared for:



DHM

Davis, Hibbitts & Midghall inc. | Opinion Research and Consultation

www.dhmresearch.com



Research Purpose

The purpose of surveying was to assess the awareness, travel patterns and choices of residents living in the Metro region.

This survey will serve as a baseline to track travel choices over time as Metro RTO programs become more prominent in the region through educating residents about transportation options including public transit, biking, walking, and carpooling.

Survey Method

- Telephone survey of 250 residents living in the Metro region ages 16 and older and oversample of 250 Alternate Mode Users (walk, bicycle, or use public transit daily, weekly, or monthly)
 - N=250 general population
 - N=358 alternate mode users
 - 108 alternate mode users in general population; plus,
 - 250 alternate mode users from oversample
- Conducted between October 24 and November 5, 2010
- Averaged 12 minutes in length
- Quotas for age, gender, and county for representative sample
- Quality control measures including monitoring, callbacks, and validations were used
- Margin of error at the 95% confidence level:
 - N=250 general population +/- 6.0%
 - N=358 alternate mode users +/- 5.1%

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Respondent Demographics

Demographic Group	General Population N=250	U.S. Census Data 16+ (2006-2009 Projections)	Alternate Mode Users N=358
Age			
16-17	3%	2%	3%
18-24	8%	10%	4%
25-34	21%	19%	12%
35-54	39%	40%	40%
55-64	16%	16%	16%
65+	11%	13%	23%
Refused	2%	--	1%
Gender			
Male	50%	49%	49%
Female	50%	51%	51%
County			
Clackamas	23%	23%	11%
Multnomah	45%	46%	74%
Washington	32%	30%	15%
Number of vehicles in household			
Vehicle Mean	2.2	1.9	1.9
Mean Household Size			
Mean	3.4	2.5	2.7

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Key Findings

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General Travel Patterns

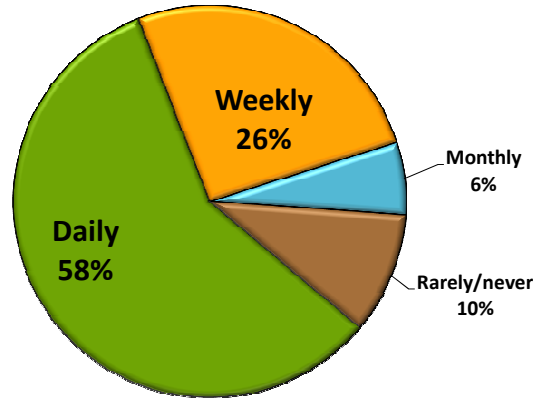


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Over the course of this year, did you use a car daily, few times a week but not every day, several times a month, or rarely?

Gen Pop N=250

Driving Propensity:
General Population



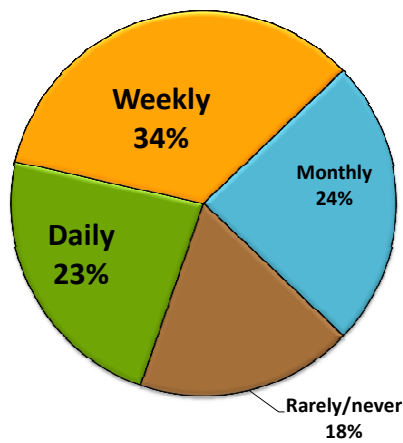
Q2

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Over the course of this year, did you walk daily, few times a week but not every day, several times a month, or rarely?

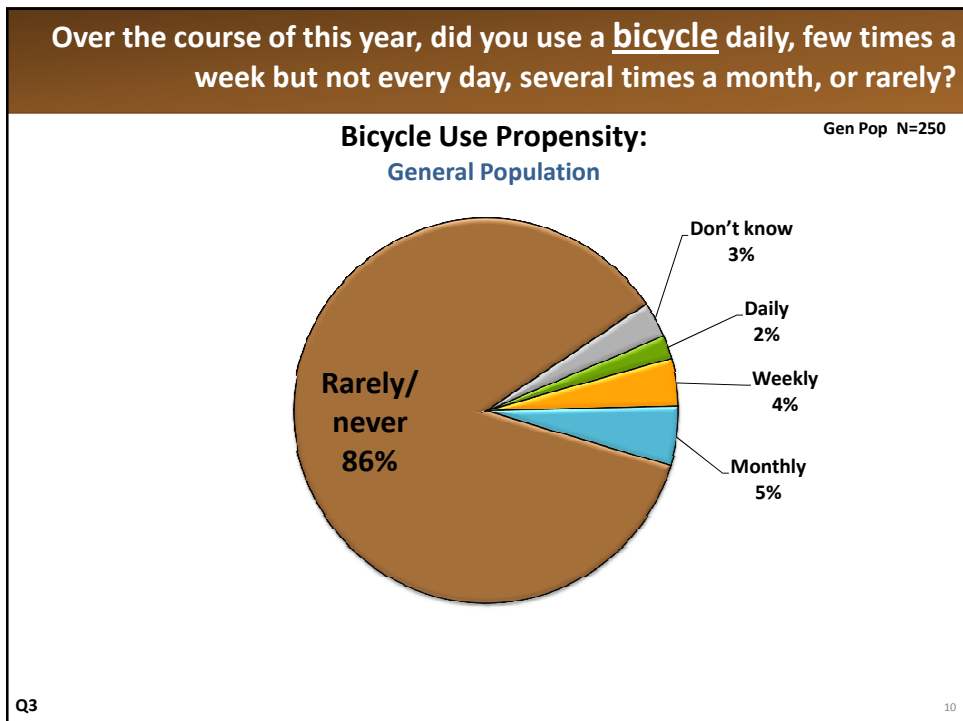
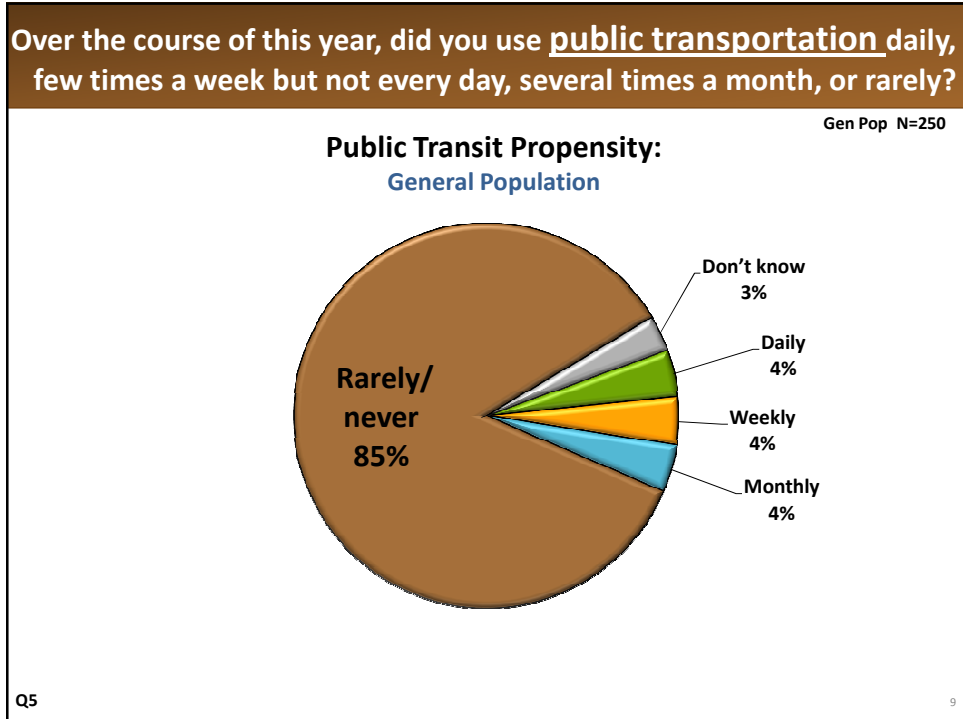
Gen Pop N=250

Walking Propensity:
General Population



Q4

8



Travel Choices and Trip Purposes



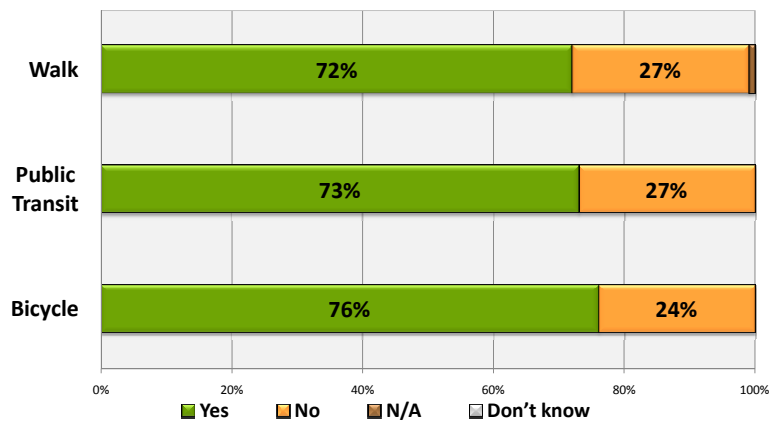
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(Alternate modes monthly or more) Do you use (Walk, Public Transit, Bicycle) at all for leisure activity trips?

Using Non-Driving Options for Leisure Activity Trips:

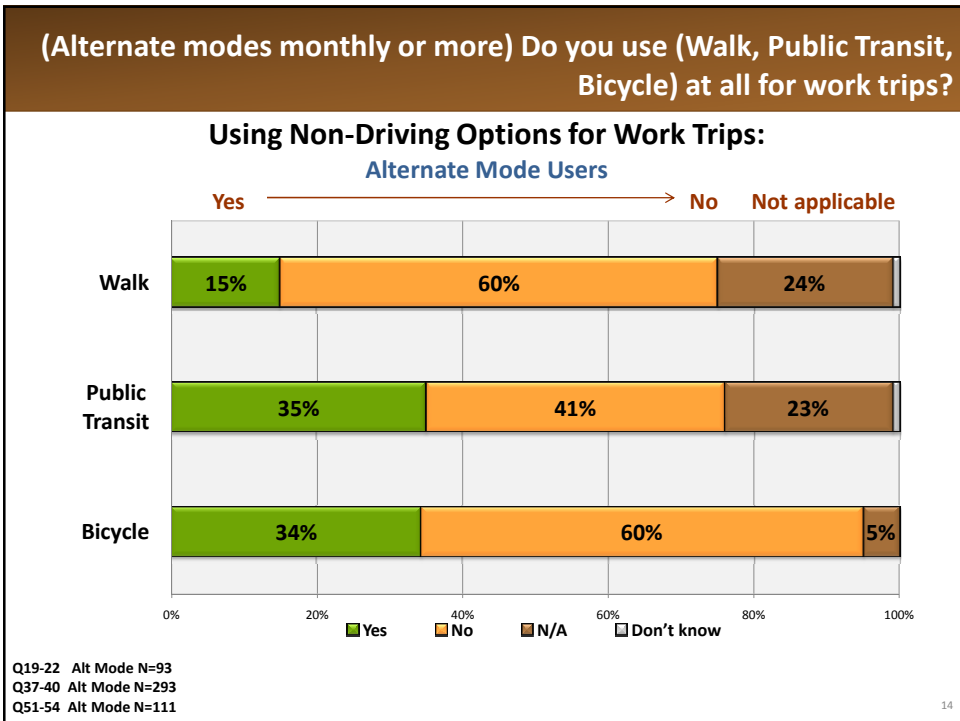
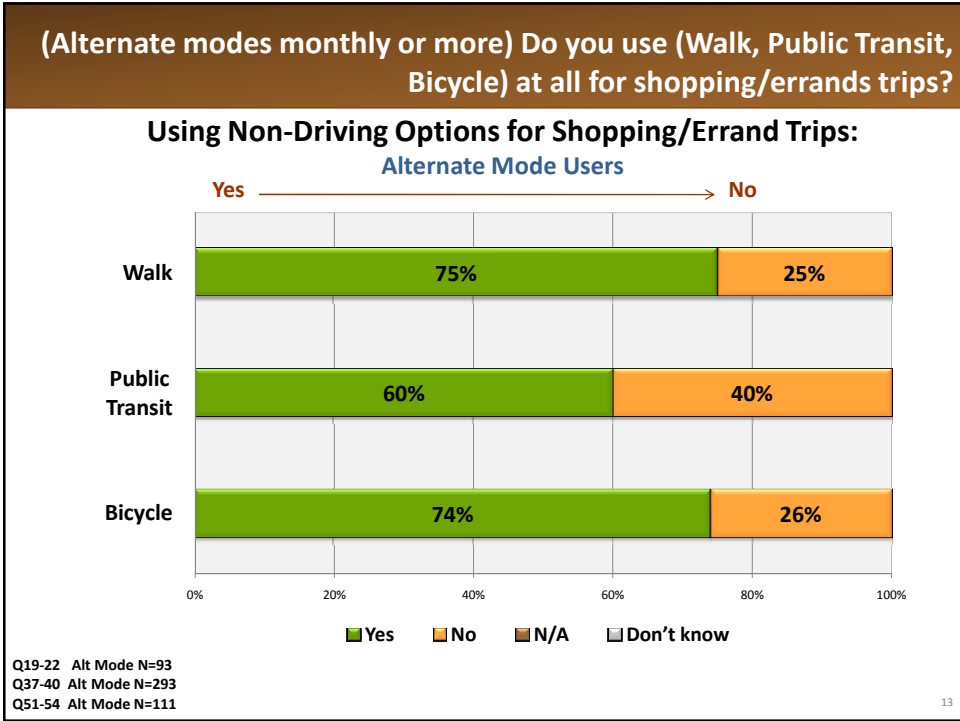
Alternate Mode Users

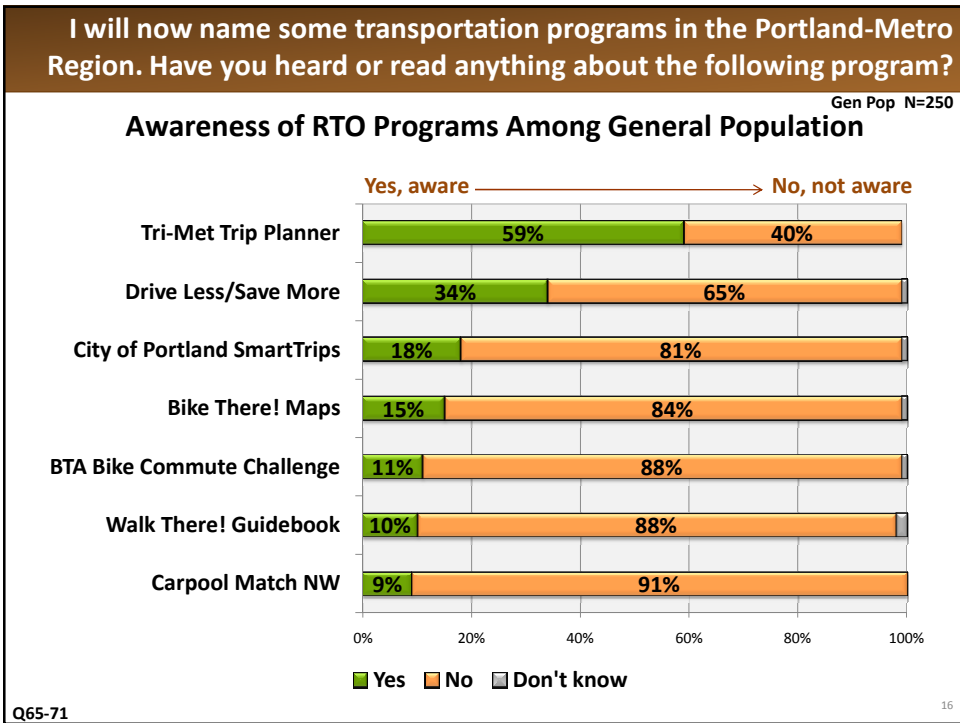
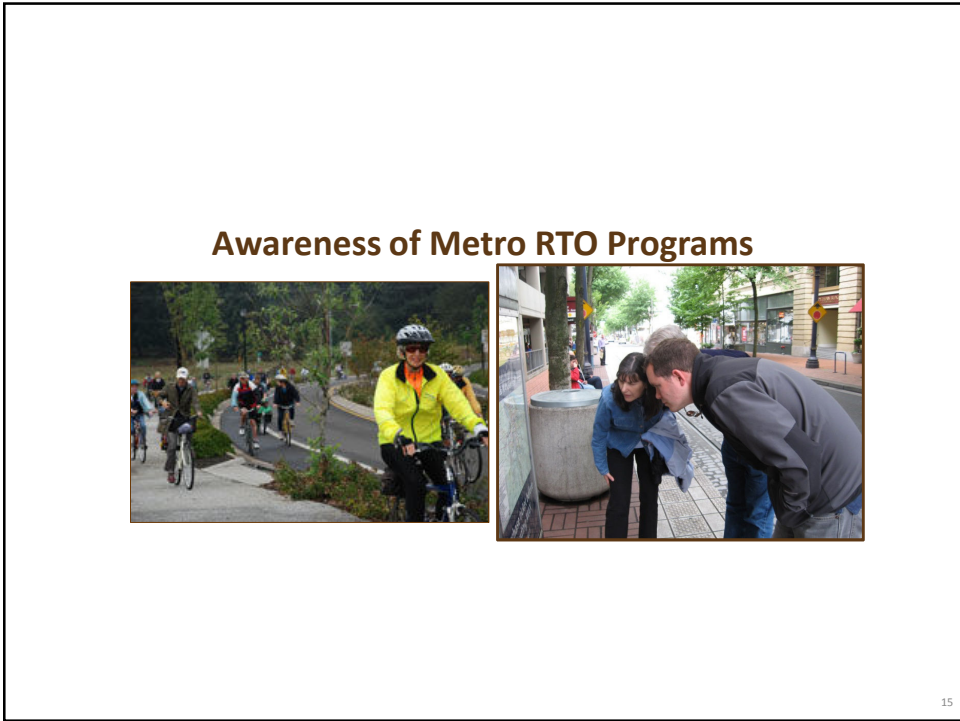
Yes —————> No

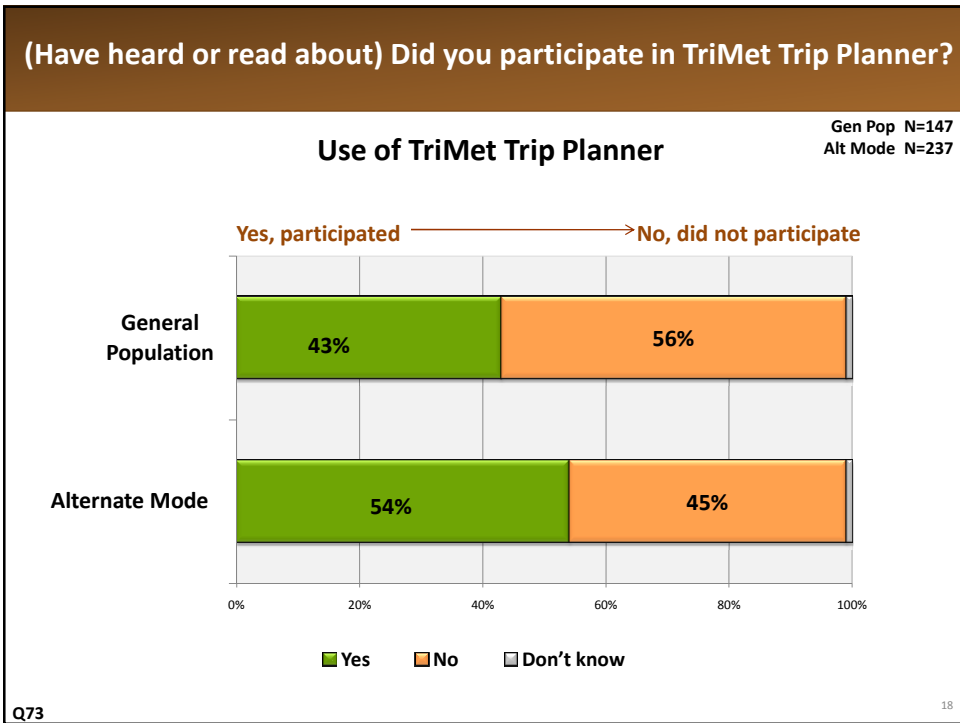
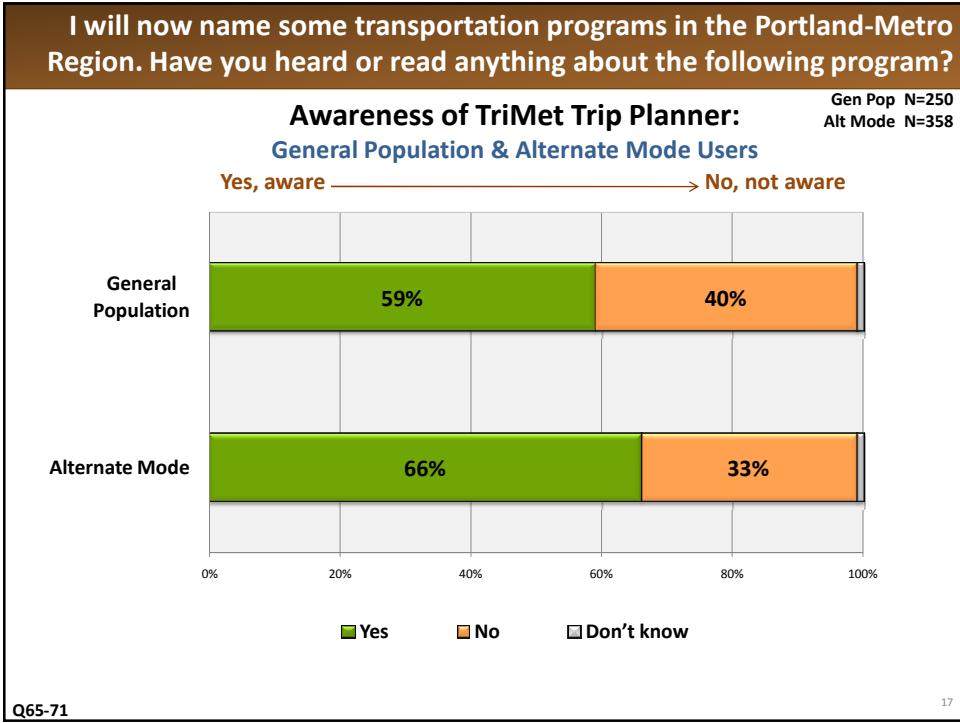


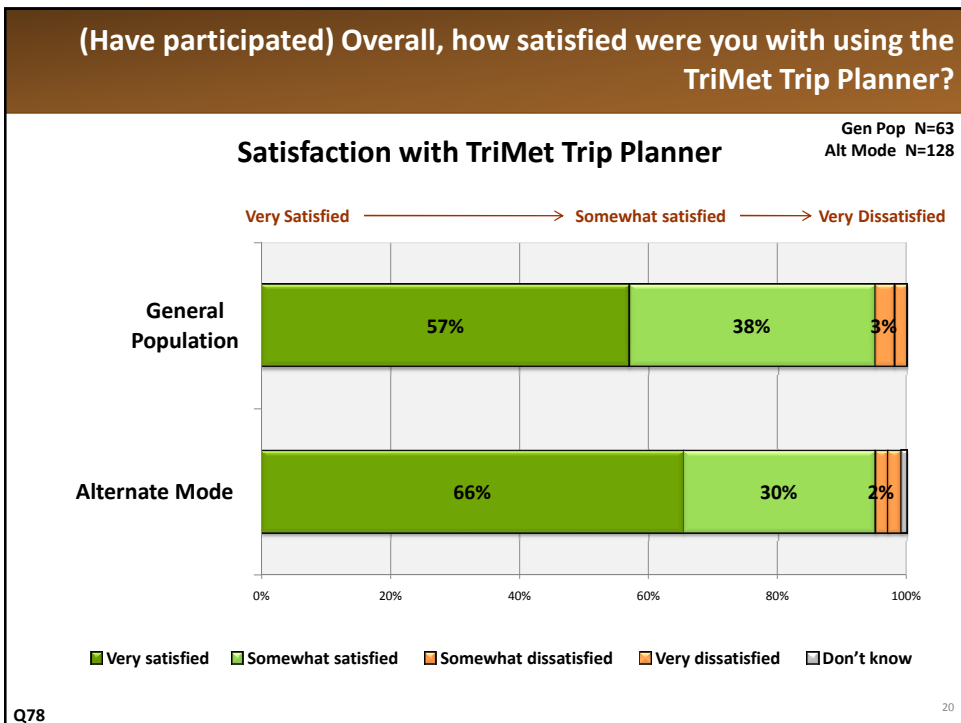
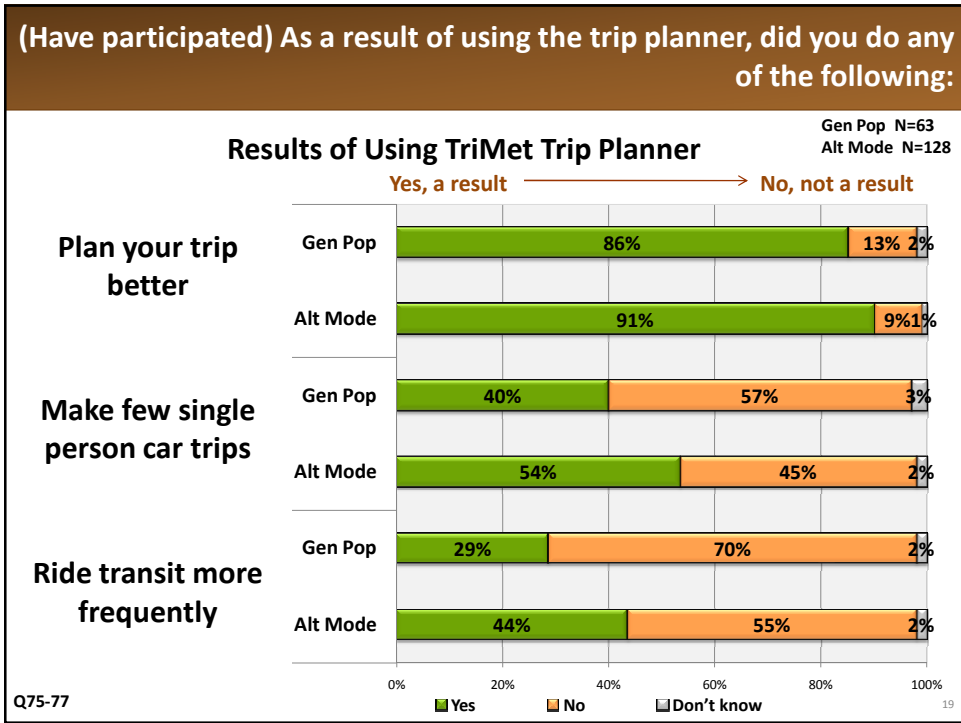
Q19-22 Alt Mode N=93
 Q37-40 Alt Mode N=293
 Q51-54 Alt Mode N=111

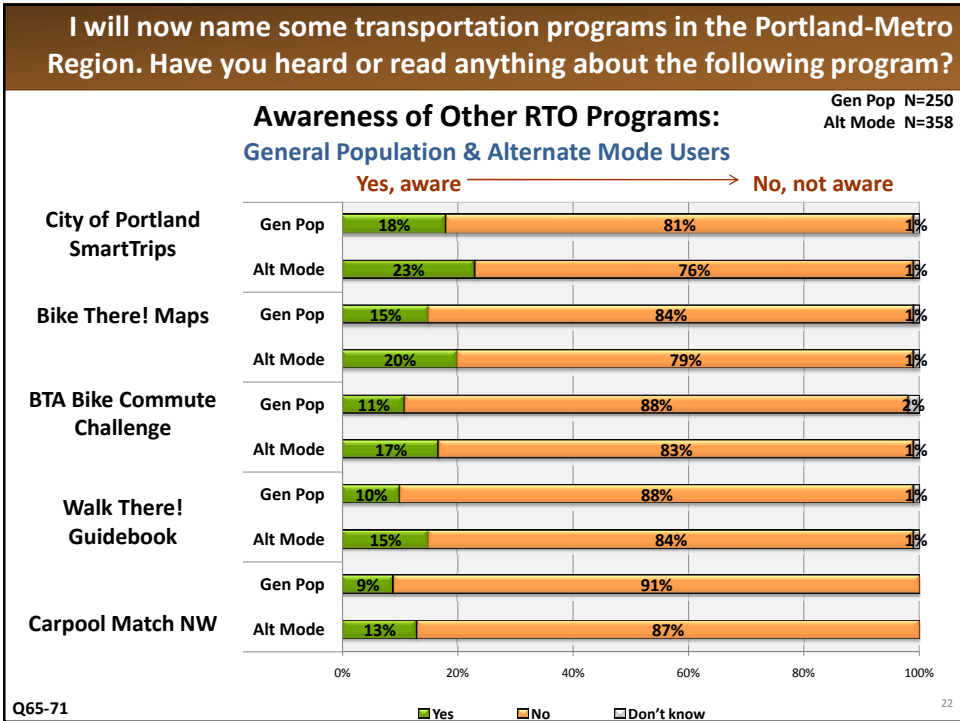
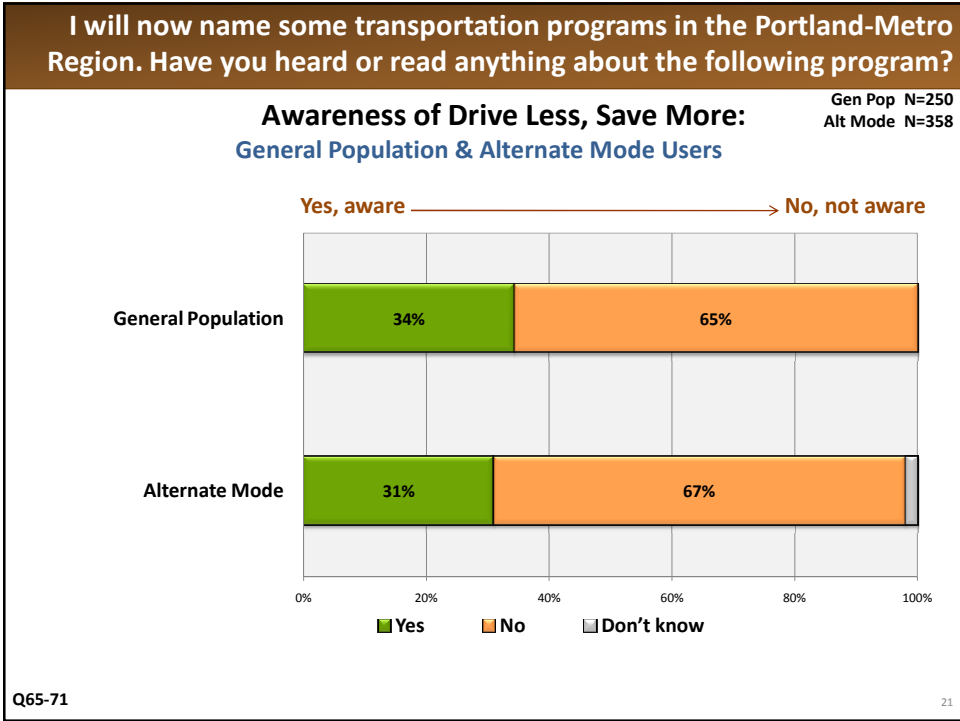
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Commuting and Employer Outreach Impact

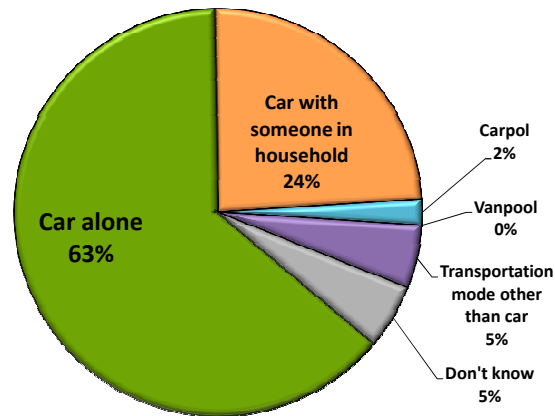


23

(Drive car daily, weekly, monthly) Which of the following best describes how you commute to (work/school) most of the time?

Gen Pop N=225

How Residents Commute to Work or School Most of the Time: General Population



Q6

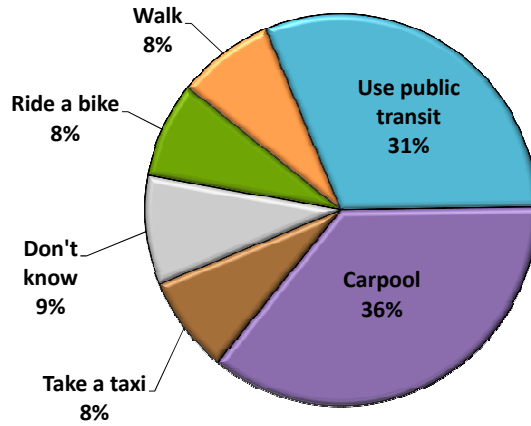
24

(Drive alone and Employed/Student) If you did not have access to a car, and needed to get to (work/school), would you most likely:

How Residents Would Commute if They Have No Access to Car:

Gen Pop N=106

General Population



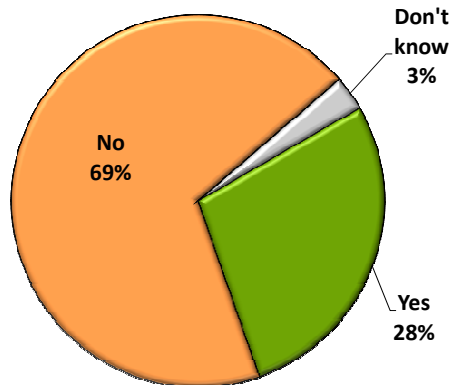
Q7

25

(Drive alone and Employed/Student) Have you ever considered carpooling to commute on a regular basis? This would be as an organized carpool other than your household or family members.

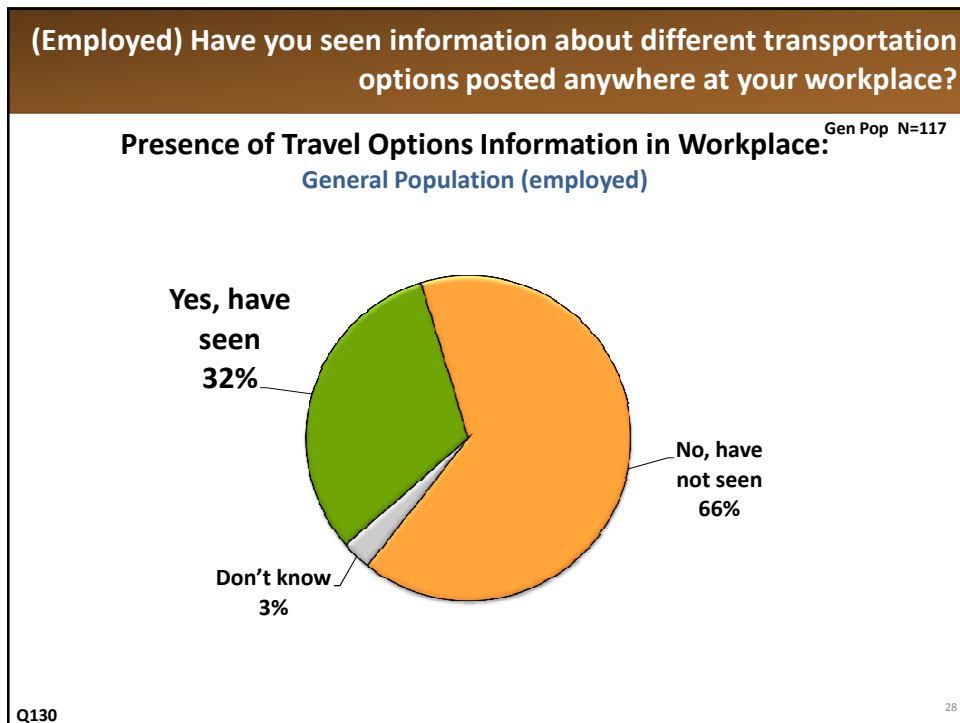
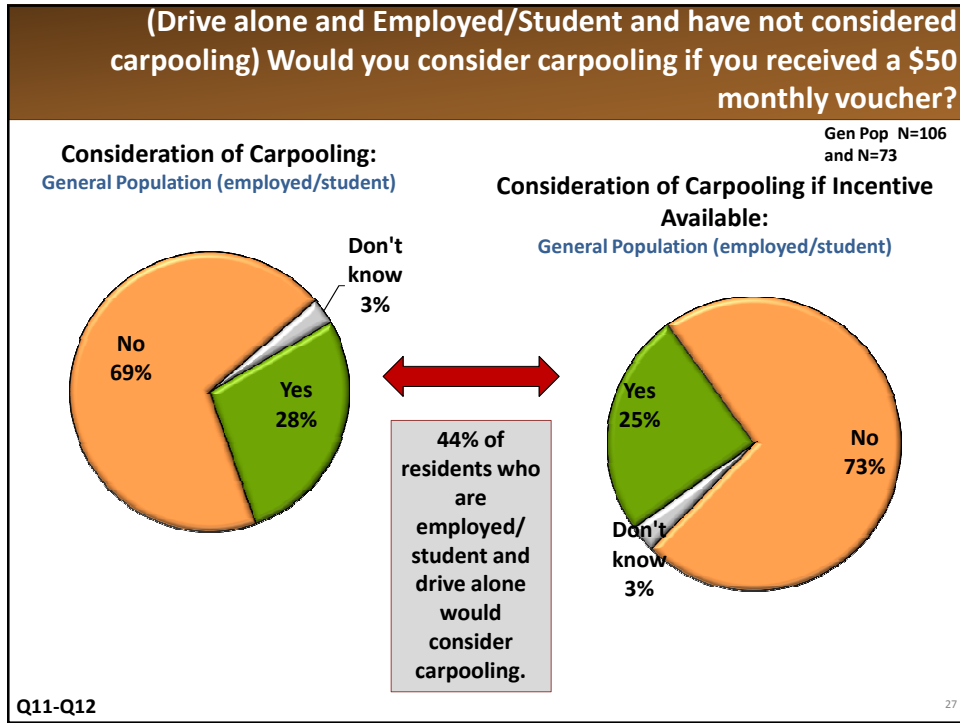
Consideration of Carpooling:
General Population (employed/student)

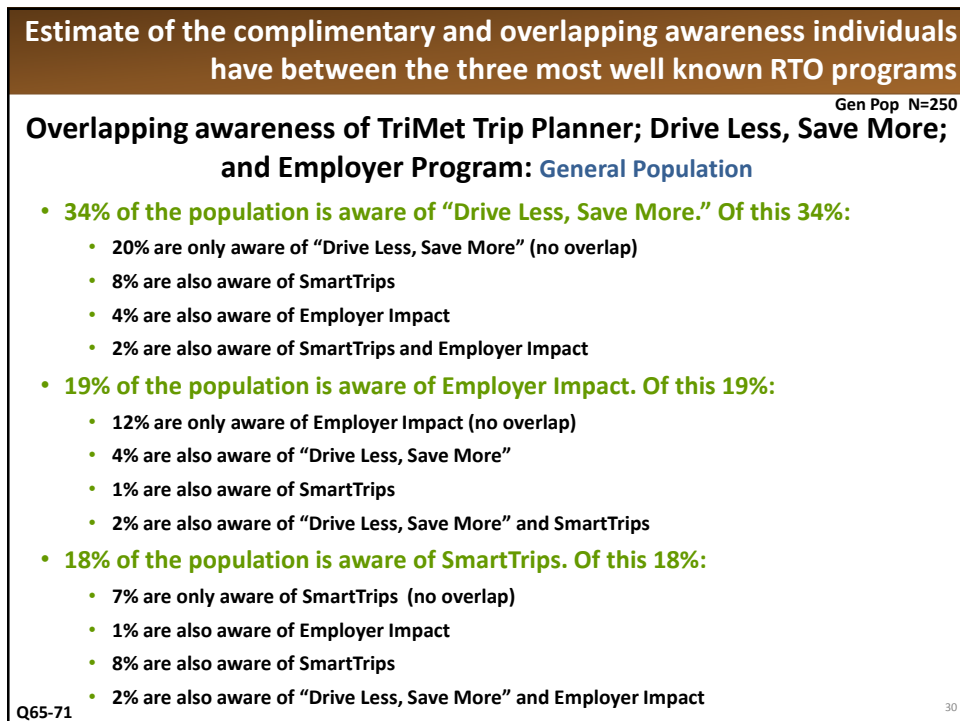
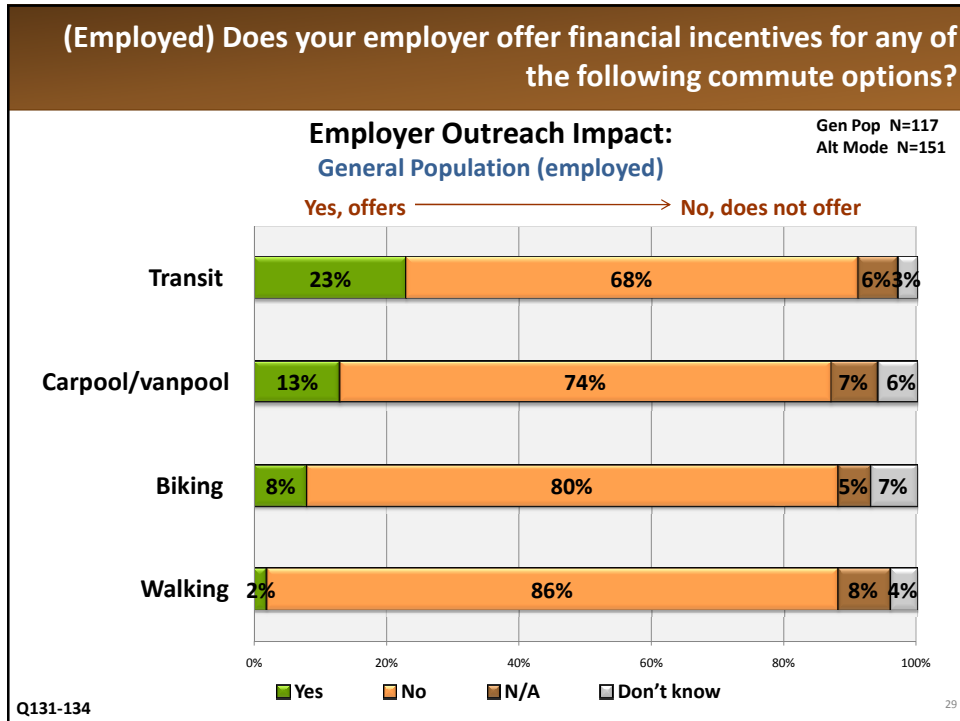
Gen Pop N=106

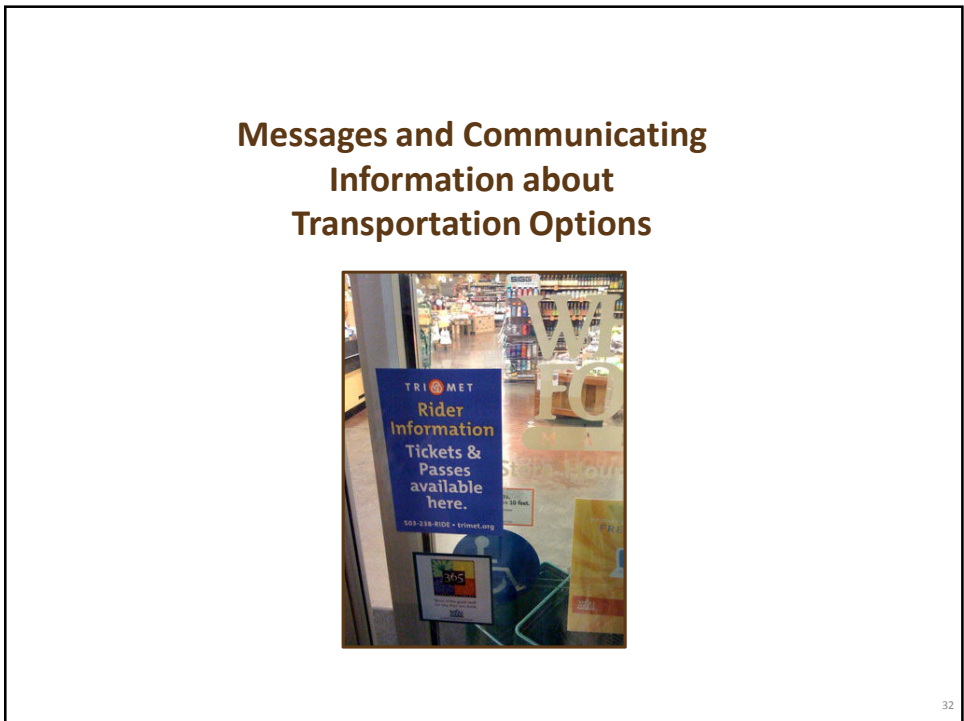
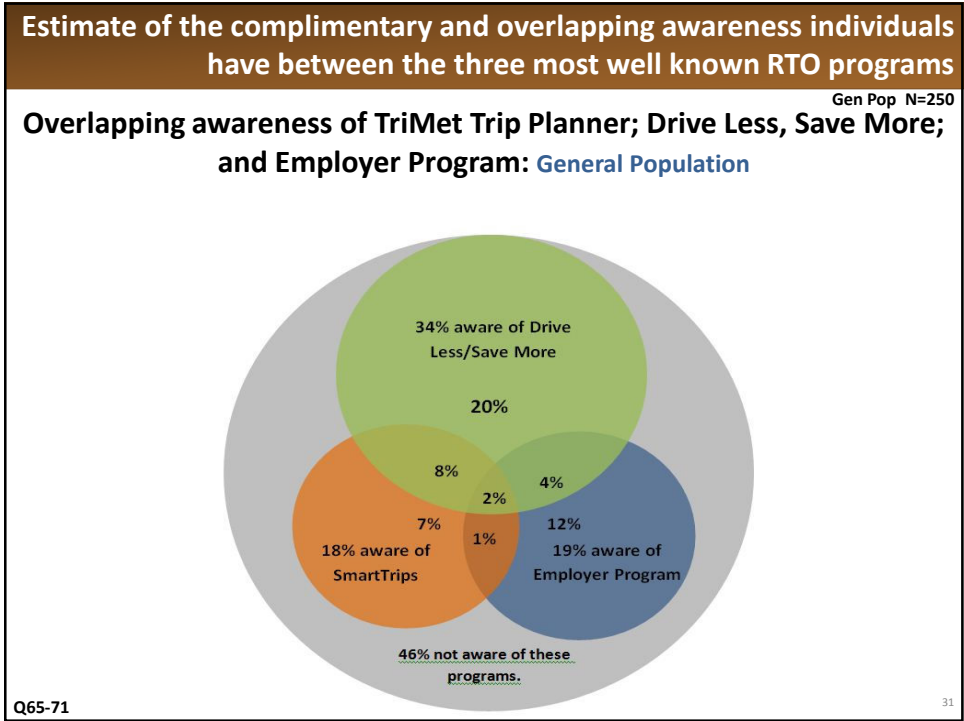


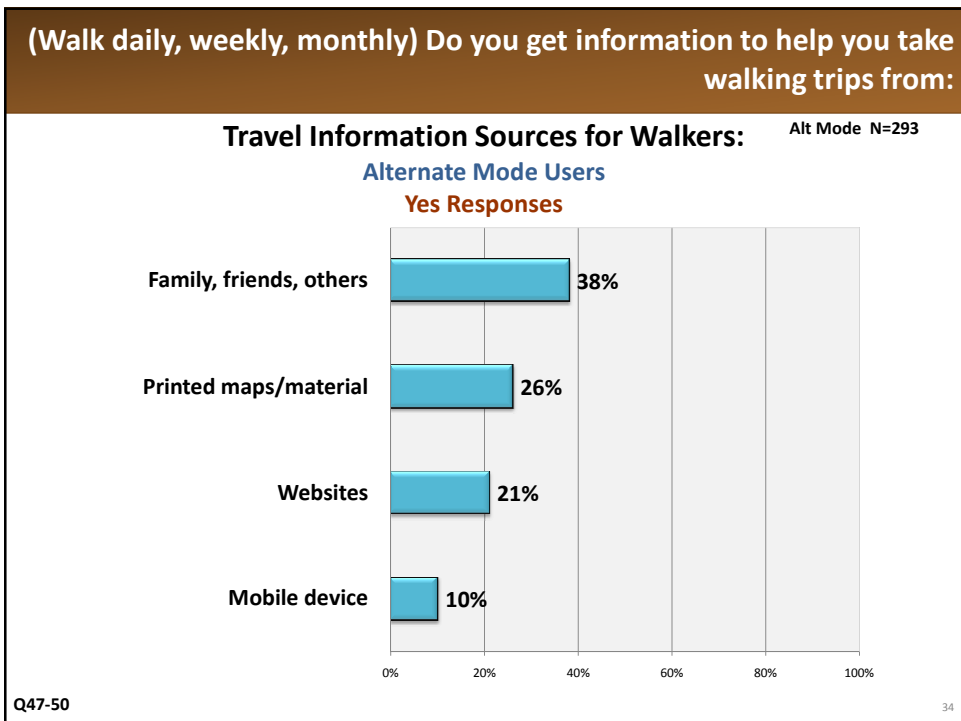
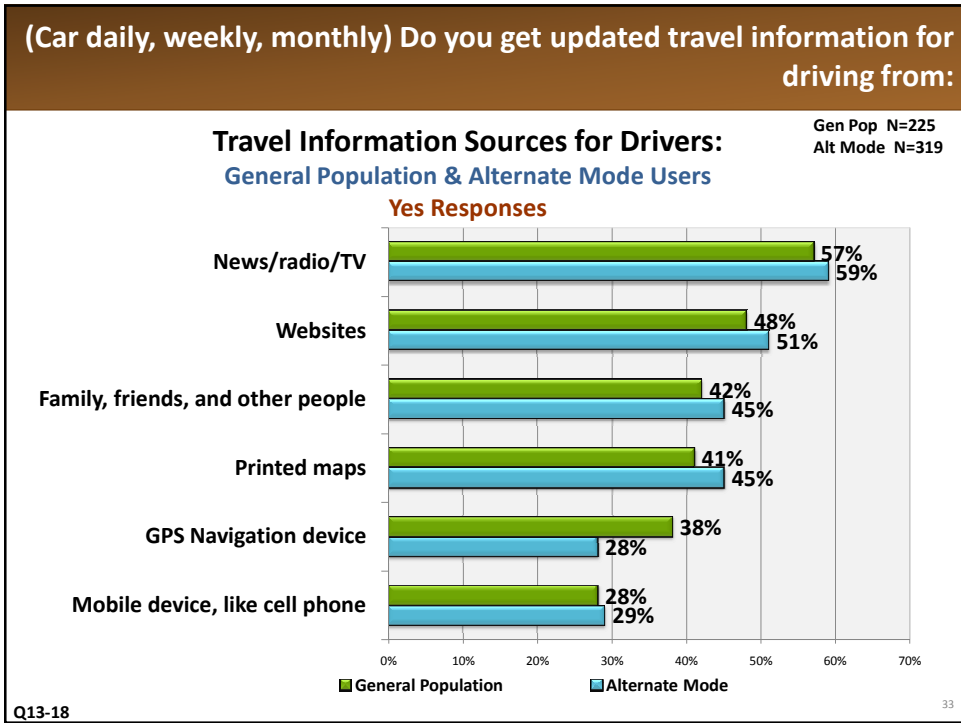
Q11

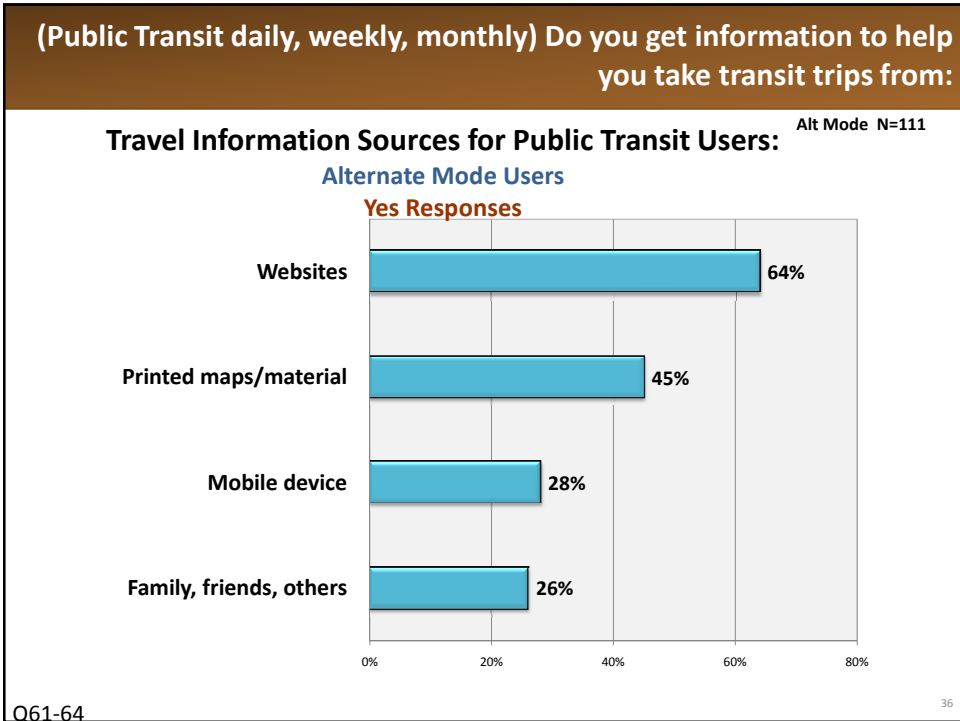
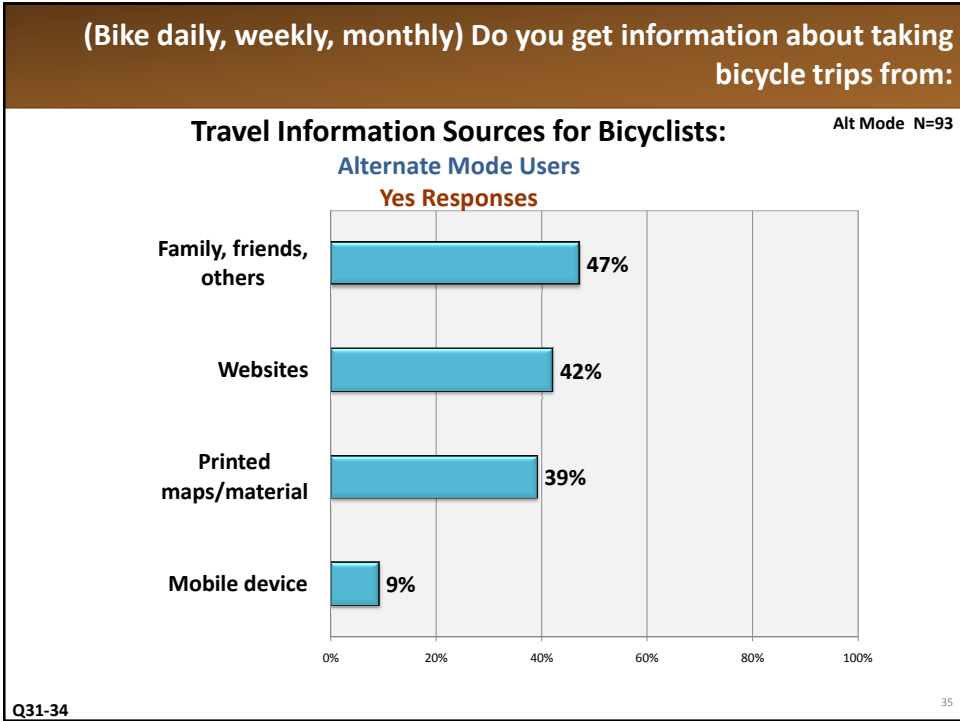
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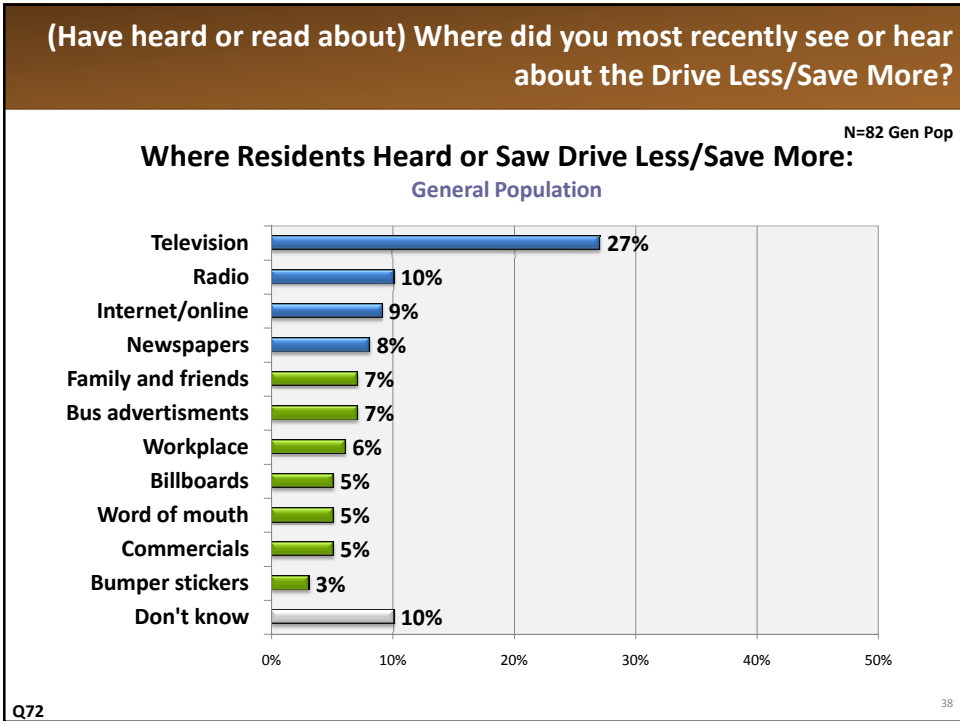
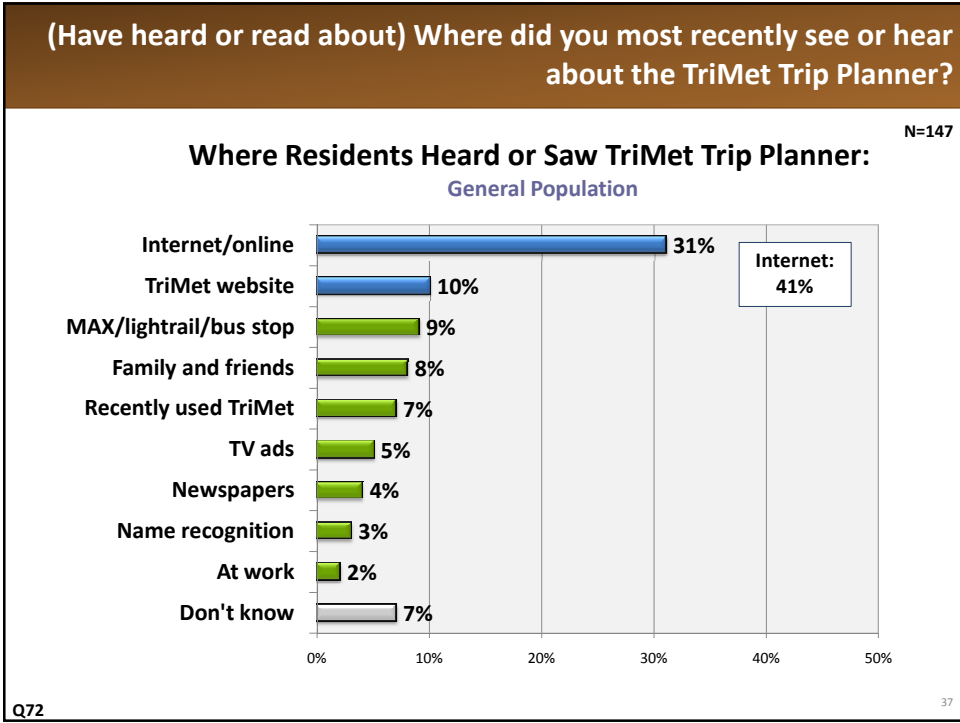


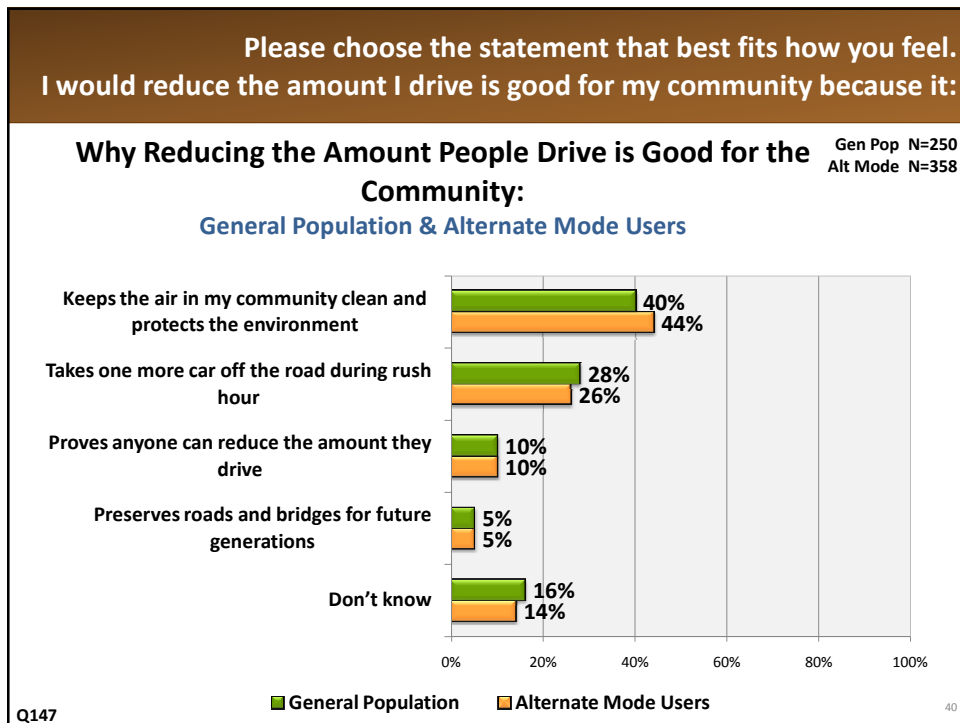
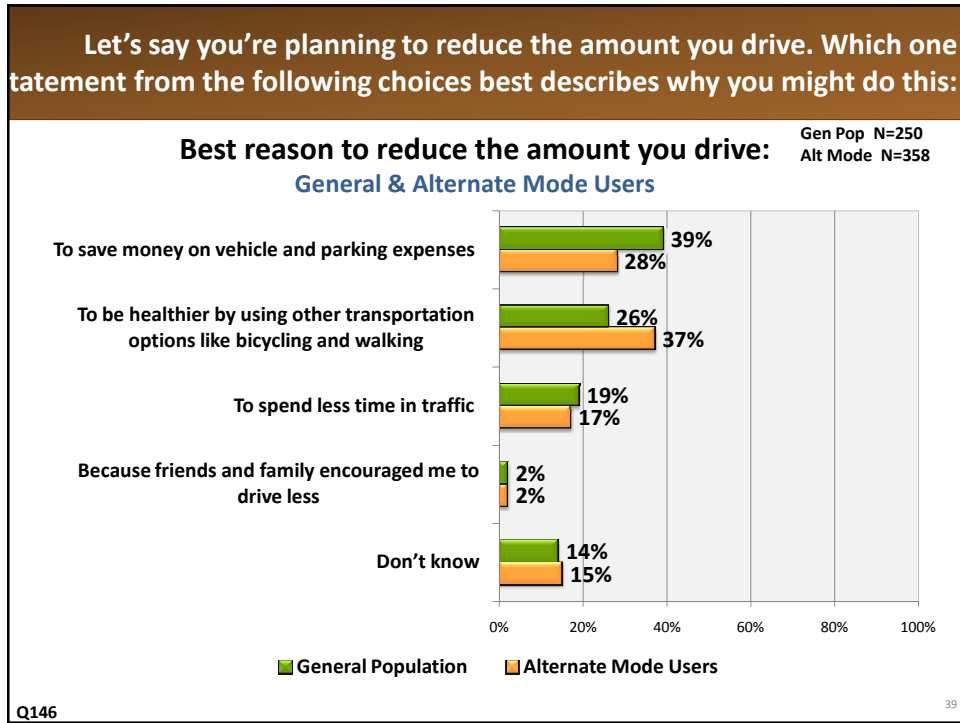


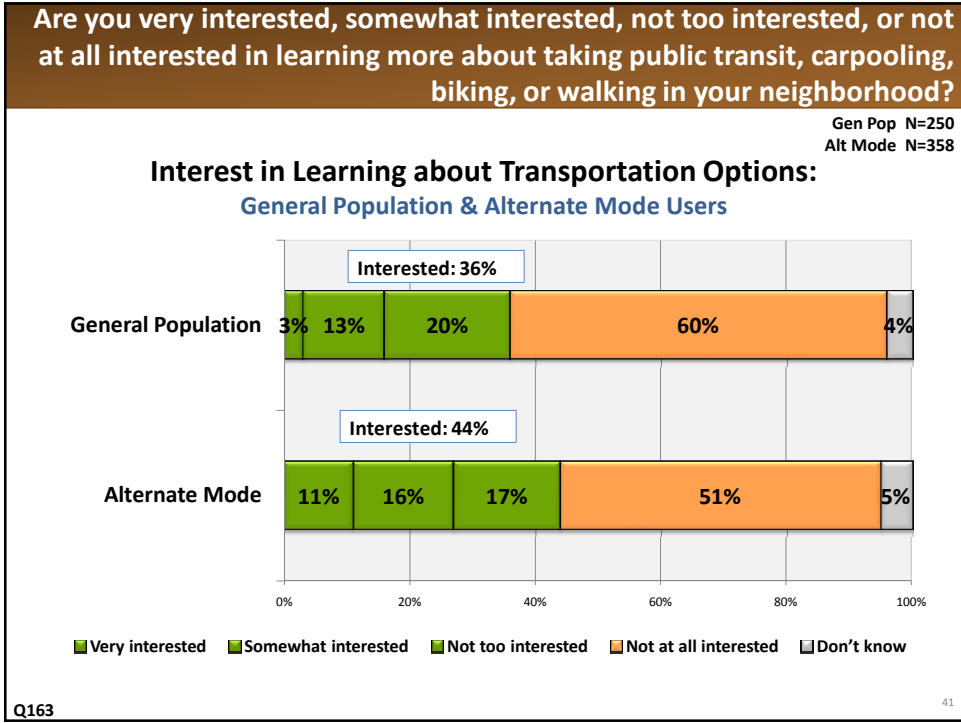












Summary

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- **There is high exposure in the region to using walking as a alternate travel mode, especially for leisure activities and shopping.**
- **Although only 1 in 10 residents bicycle or use public transit monthly or more, 3 in 10 of those who employ these transportation options do so for work trips.**
- **There is high awareness of TriMet Trip Planner, in large part because of its online presence. There is moderate to low awareness of other RTO programs.**
- **Even though more than 8 in 10 residents rely on their car for at least some trips, 47% would use an alternate mode if they did not have access to a car.**
- **And even though 7 in 10 have not considered carpooling, a plurality of commuters express openness to the idea.**

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Potential Markets



Potential for new carpool commuters Approach with information, carrot or stick?



- 36% would carpool without access to car
- 28 % have considered carpooling
With an incentive (\$50/month), total interest grows to 44%
- If commuters who park for free are presented with a \$25/month fee (Q145, N=86),
44% would pay and continue to drive;
21% would start carpooling or vanpooling; and
9% would switch to bicycle or transit



System, Satisfaction and Safety

- High levels of overall satisfaction for **biking** (93%)
Lower satisfaction ratings among bicyclists for:
 - Availability of bike parking (84%)
 - Awareness of bicyclists by car drivers (68%)
 - Connectivity of bike routes (78%)
 - Ease of combining bike and transit trips (55%; 31% “Don’t know”)
- 1/3 of bicyclists indicated that personal safety concerns prevented them from cycling more frequently
Cyclists would feel safer with:
 - More bike paths and better connectivity
 - Drivers more aware of cyclists
 - More visible and spacious bike lanes
 - Well-lit streets

System, Satisfaction and Safety (cont.)

- High level of overall satisfaction for **walking** (90%)
Lower satisfaction ratings among walkers for:
 - Ease of crossing busy streets (79%)
 - Awareness of pedestrians by car drivers (74%)
 - Awareness of pedestrians by cyclists (72%)
- High level of overall satisfaction for **transit** (94%)
Lower satisfaction ratings among transit users for:
 - Bus/MAX/Streetcar connections (82%)
 - Personal safety at the Bus/MAX/Streetcar (79%)
- Shows that experiences exceed expectations

Market Segments

Tougher audiences:

- Households earning \$75,000 or more annually
- Households with at least one car per driver
- Family-age
- Male are more likely to be daily drivers
- Longer residency and living in areas with fewer amenities



Support and grow audiences:

- Weekly drivers
- Young adults and nearing retirement or retired
- Females more likely to carpool & walk; males likely to bike
- Shorter residency and living in areas with more amenities
- More experience with travel options



Connecting Land Use and Transportation

Residents living and working in areas with *higher* than average location composite scores:

- Drive less frequently
- Walk, bike, and use transit more frequently for work , leisure, and shopping trips
- Make more of their public transportation trips by bus
- Choose transit and bicycling for a commute trip if their car wasn't available (less likely to carpool)
- Are generally more satisfied with transit, biking, and walking infrastructure
- Have a higher awareness of RTO programs
- Are more aware of transit and bike financial incentives offered at work

Ten Year Tenure

Residents with *shorter* residency (ten years or less):

- Tend to be younger (up to 44 years old)
- Own fewer cars and tend to live and work in areas with good access to transportation infrastructure and amenities
- Have higher levels of satisfaction using transportation options
- Have a higher instance of using travel information for bicycling and walking trips
- Bicycle and use transit more frequently; not likely to carpool for a commute trip
- Make more of their public transportation trips by bus
- More likely to incorporate transportation as a factor when deciding to move

Messages

County

	“Save money”	“Healthier”
• Clackamas	19%	11%
• Multnomah	34%	34%
• Washington	44%	20%

Driver-only

- Nearly half (47%) of daily drivers who rarely/never use transit, bike or walk said “Save money”

Gender

- “Save money” message was 42% female and 36% male
- “Healthier” message was 22% female and 30% male

Future Research

The upcoming focus groups and in-depth interviews may fully explore:

- **Removing barriers to using alternate modes for commuting purposes among moderate alternative mode users.**
Target population: those who use public transit/bicycle monthly for leisure and shopping trips.
- **Incentives to start carpooling among commuters open to the idea.**
Target population: those who would carpool if they did not have access to a car and commuters who said they would consider carpooling.
- **Best and needed information sources for bicycling, walking, public transit trips.**
Target population: those who use TriMet Trip Planner and who walk, bicycle, and use public transportation on a weekly basis.
- **Best messages for non-users and moderate users.**
Target population: Residents who are drive only; residents who use alternate modes weekly or monthly, but not daily.

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The end

