

Regional Travel Options

Measurement

DRAFT

2012 RTO Travel and Awareness Survey Background

December 11, 2013



Metro | *Making a great place*



Survey Team

- RTO Staff, project lead by Caleb Winter and Derek Hofbauer
- DHM Research
 - Su Midghall
 - James Kandell
- EnviroMedia
 - Jennifer Gilstrap
 - Ryan Gallagher



Input

PSU Center for Urban Studies

2010

- RTO Travel and Awareness Survey
Baseline, 2 Focus Groups with drivers
who have mild use of travel options

2012

- RTO Marketing Group, TriMet, City of
Vancouver, University of Michigan, DHM
& EnviroMedia

An orange vertical rectangle on the left side of the slide, featuring a faint, stylized map of a city street grid.

What's new? What's cool?

Awareness

- Drive Less Connect
- Walk There! app
- TriMet Map Trip Planner
- Sunday Parkways/Sunday Streets
- Carsharing
- Safe Routes To School

What's new? What's cool?

Messages

- Asked follow-up, for example, best reason is to save money:

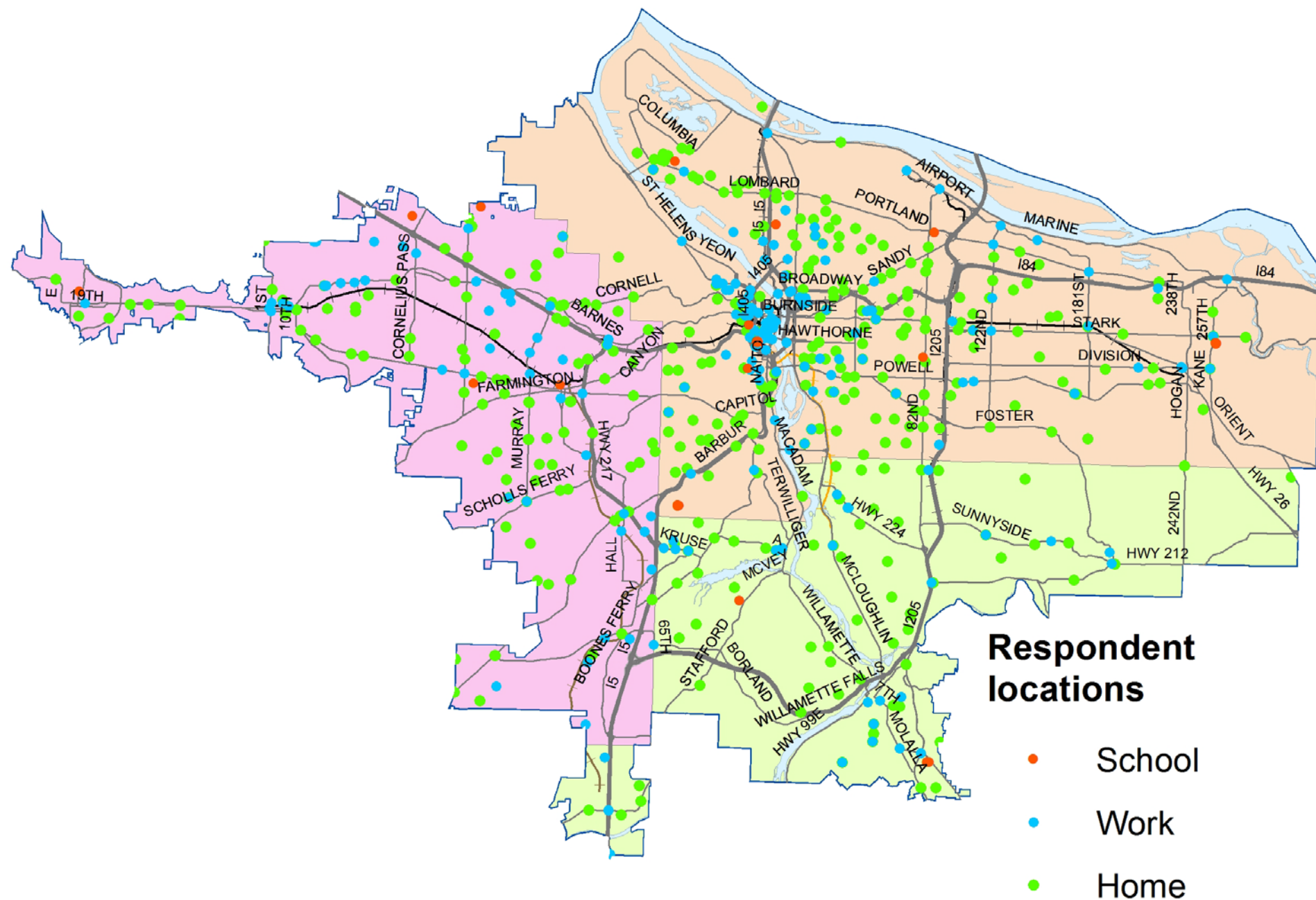
“How much money do you think you could save each week by reducing the amount you drive?”

An orange vertical rectangle on the left side of the slide, featuring a faint, stylized map of a city street grid.

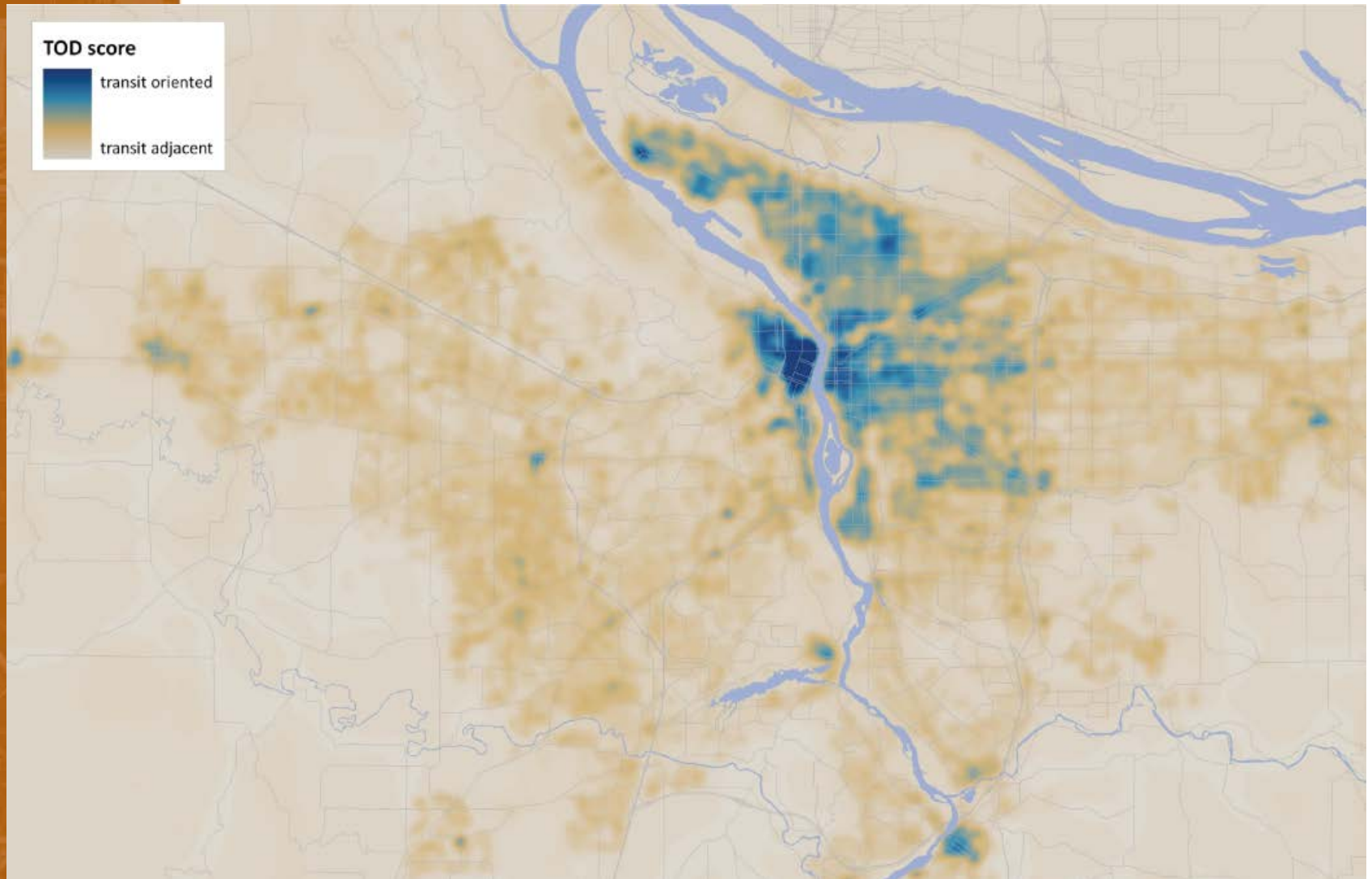
What's new? What's cool?

Demographics

- Race
- Hispanic ethnicity
- Language spoken at home
- Housing type
- Own/rent



Context Tool Scoring



What's new? What's cool?





Implementing the 2012-2017 RTO Strategic Plan

- Collaborative marketing, messaging, outreach
- Grants
- Measurement, evaluation, research

RTO Travel and Awareness Survey

November 2012

Prepared for:



DRAFT

dhm RESEARCH
DAVIS, HIBBITTS & MIDGHALL, INC.

www.dhmresearch.com



1.

RESEARCH PURPOSE AND METHODOLOGY

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

This survey, along with a similar survey conducted in 2010, continues to 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.

***This is not the definitive transportation survey in the region; it is a tool for use by RTO program partners**

- **Telephone survey of 581 residents living in the Metro region ages 16 and older**
- **Conducted between October 16 and October 23, 2012**
- **Averaged 13.5 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 is +/- 4.1%, at the 95% confidence level**

Respondent Demographics

Demographic Group	Total Sample N=581	U.S. Census Data 16+
Age		
16-34	33%	32%
35-54	37%	37%
55+	31%	31%
Refused	0%	--
Gender		
Male	48%	49%
Female	52%	51%
County		
Clackamas	21%	23%
Multnomah	46%	46%
Washington	33%	30%
Number of vehicles in household		
Vehicle Mean	2.3	1.9
Mean Household Size		
Mean	3.1	2.5

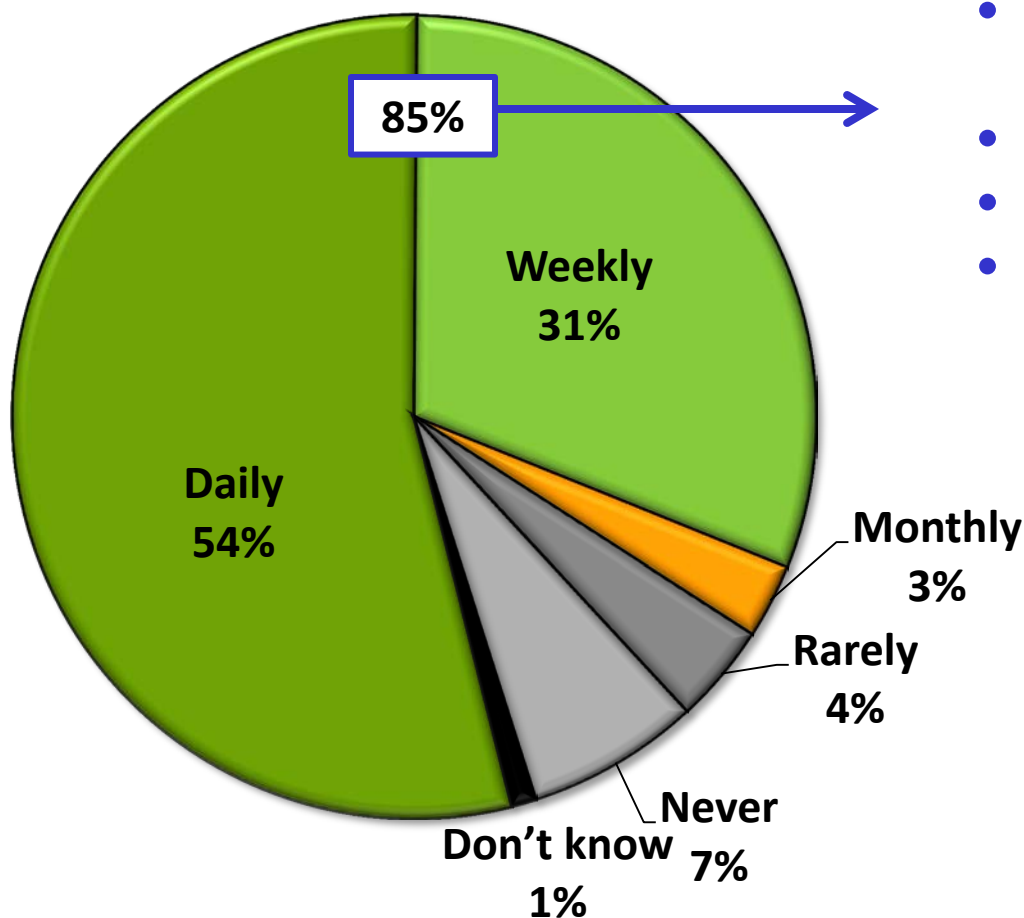
2.

GENERAL TRAVEL PATTERNS

Driving remains the most common form of transportation with more than eight in ten driving at least once a week

2012 Sample N=581
2010 Sample N=250

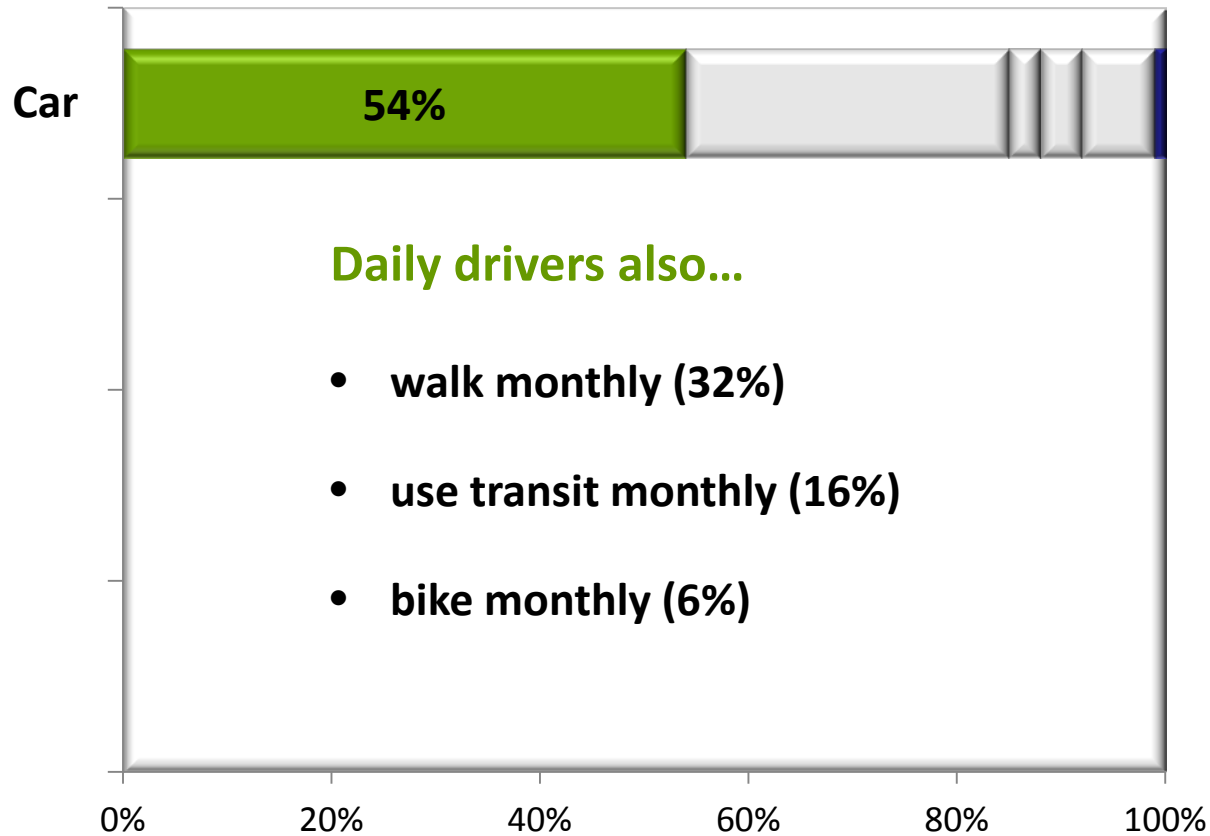
Driving Propensity



- Clackamas and Washington counties
- Age 35-54
- Male and Female
- HH Income \$50K+

Daily drivers are also utilizing other forms of transportation at least once a month

2012 Sample N=581

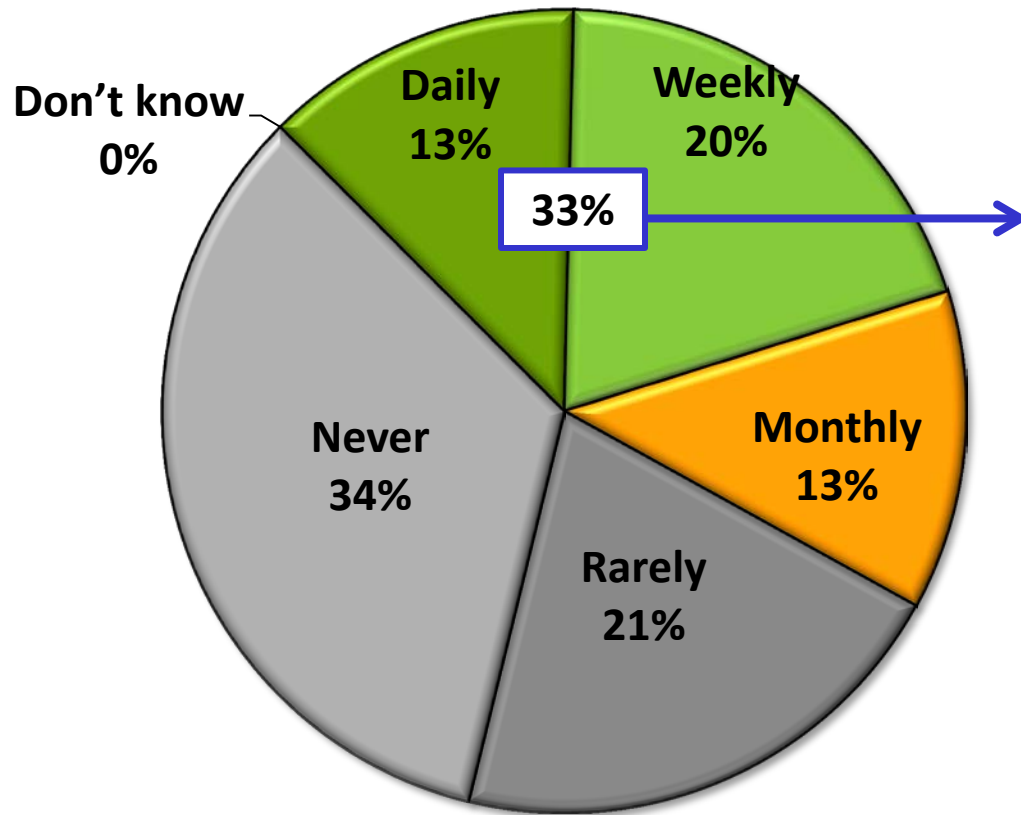


Walking is a moderately used form of transportation

2012 Sample N=581

2010 Sample N=250

Walking Propensity



- Multnomah County
- Age 25-34
- Male and Female
- HH Income <\$25K

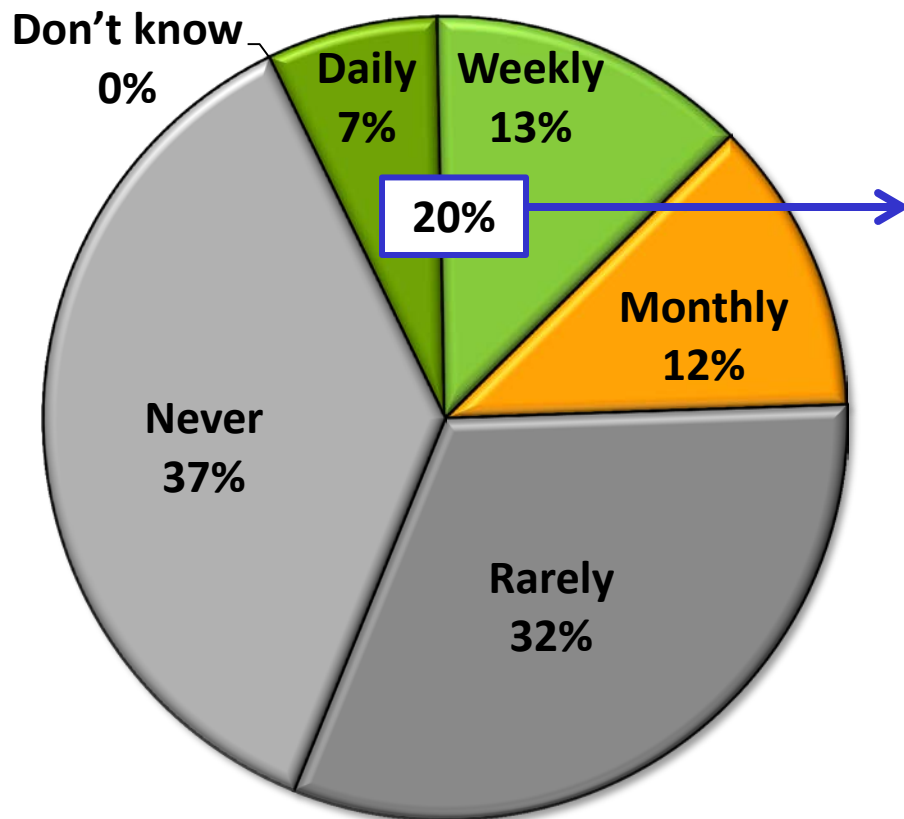
2010 Daily/Weekly
23%

Frequent transit use is up slightly compared to 2010 findings

2012 Sample N=581

2010 Sample N=250

Transit Use Propensity



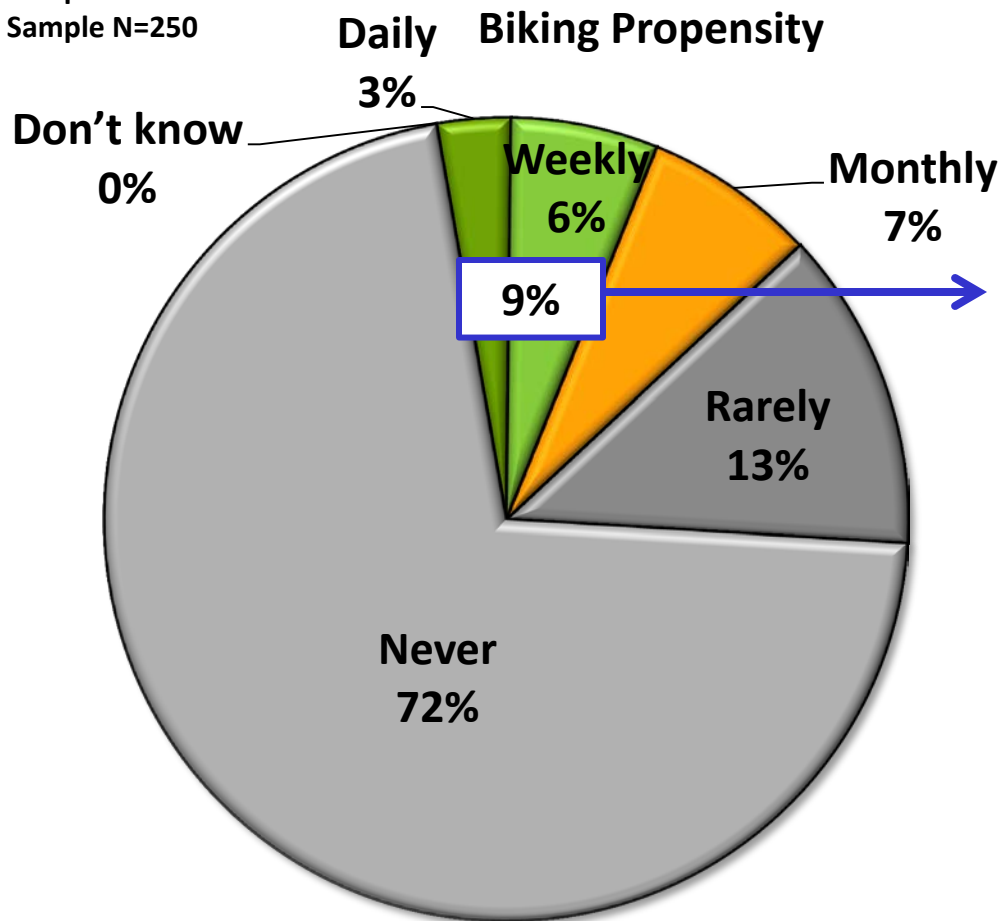
- Multnomah County
- Age 16-34
- Male and Female
- HH Income <\$25K

2010 Daily/Weekly
8%

Biking as a mode of transportation is comparable to 2010 findings

2012 Sample N=581

2010 Sample N=250



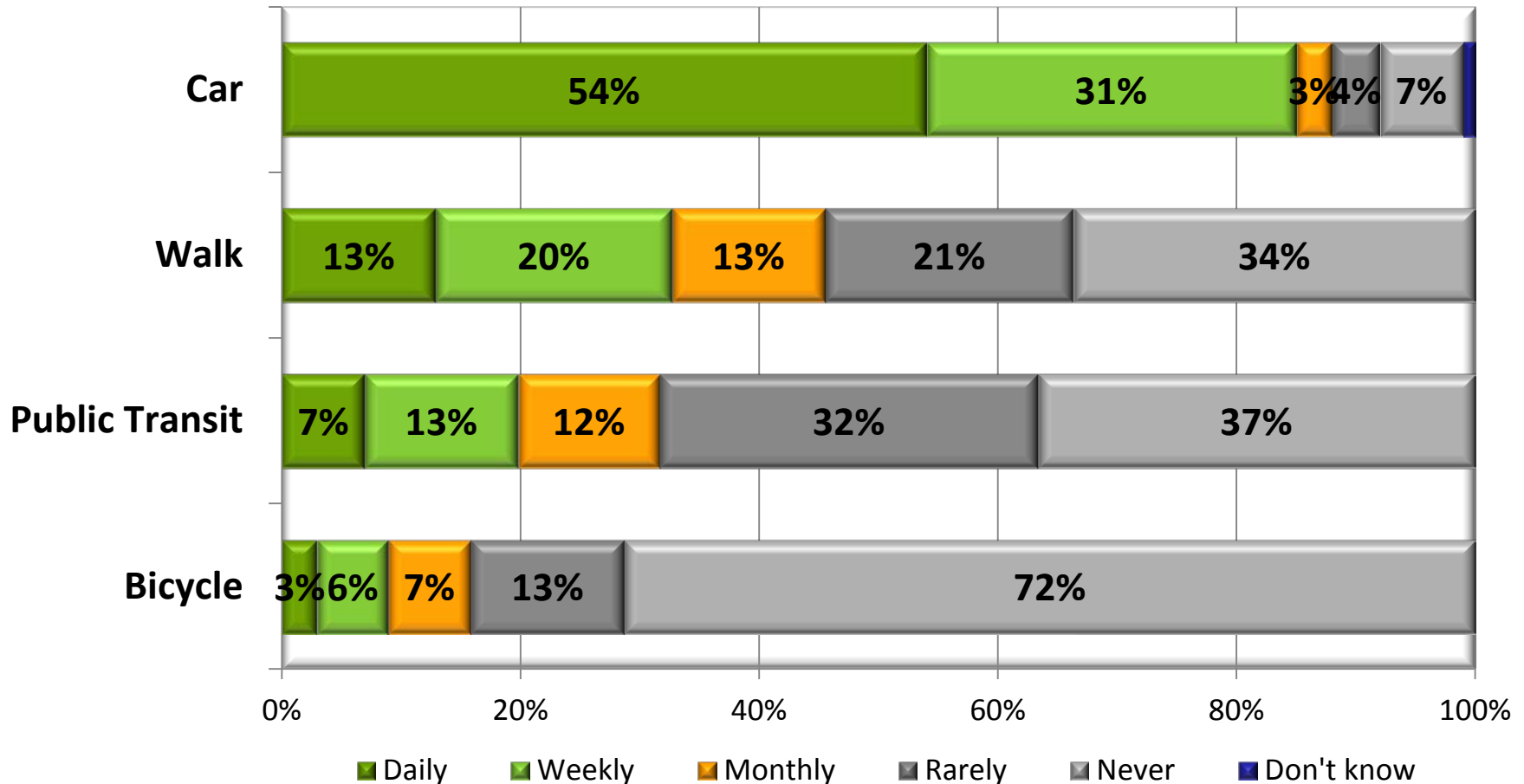
- Multnomah County
- Age 16-24
- Male (12%)
- HH Income \$100K+

2010 Daily/Weekly
6%

Summary of transportation modes

2012 Sample N=581

Propensity of Use for Driving, Walking, Public Transit, and Bicycling



SUMMARY: General Travel Patterns

- **Driving remains the most frequent mode of travel**
- **Travel options show a slight increase from 2010**
 - Walking by 10%, public transit by 12%, and biking by 3%
 - Be cautious in reading too much into this uptick until the third study shows similar trending data
- **Students and younger residents are more likely to use travel options; those employed and older residents are more likely to drive**

3

**AWARENESS OF METRO RTO
PROGRAMS**

Carsharing services and TriMet Trip Planner show the highest awareness when considering regional travel programs

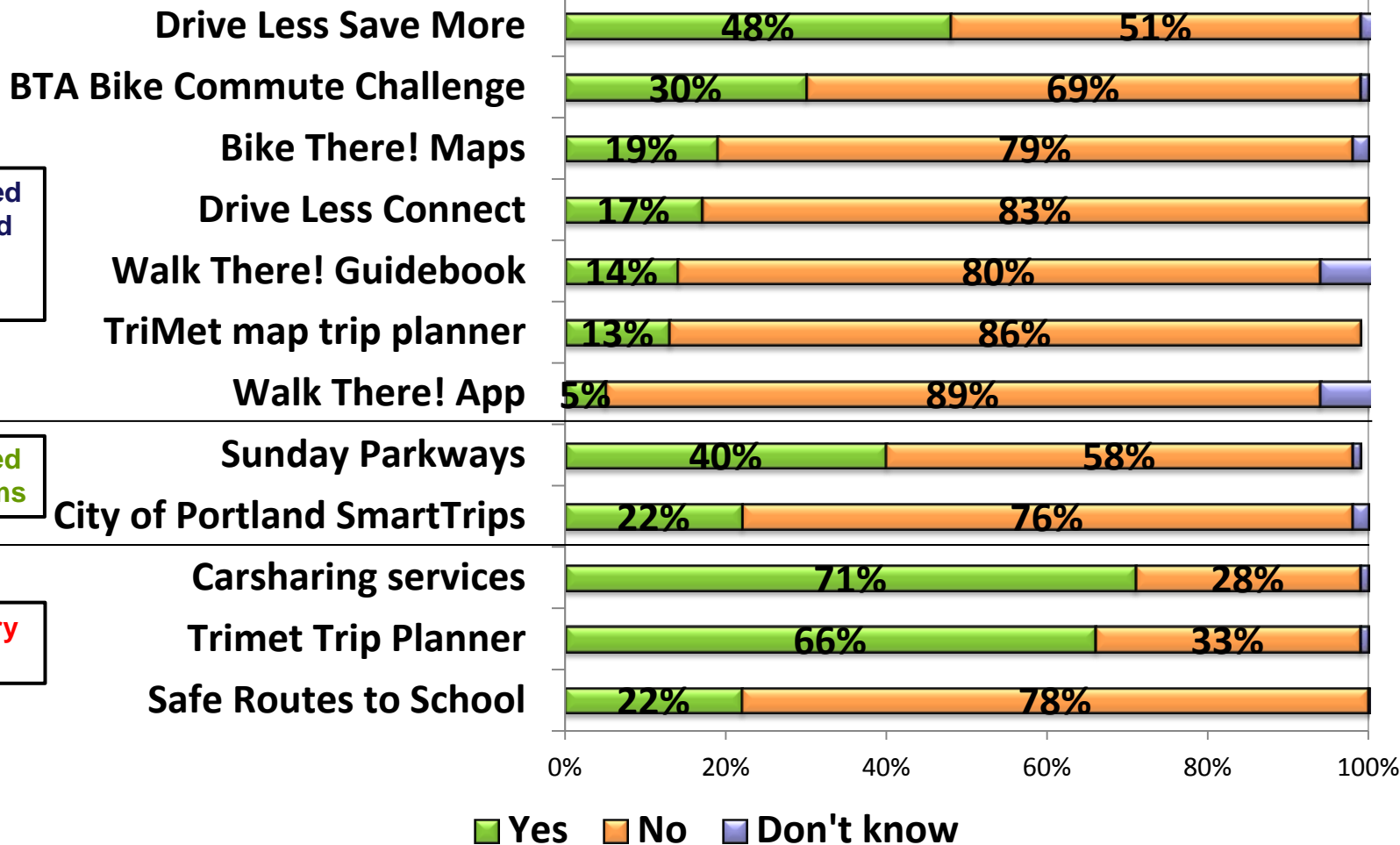
2012 Sample N=581

Awareness of Travel Programs

RTO Supported
State-wide and
Region-wide
Programs

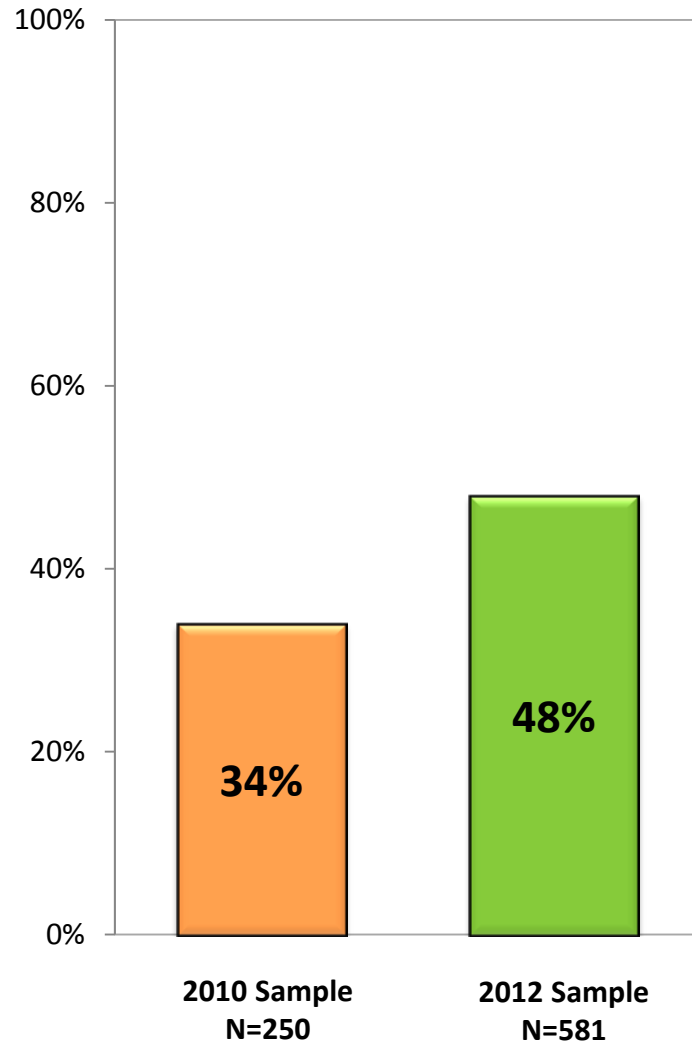
RTO Supported
Local Programs

Complimentary
Programs

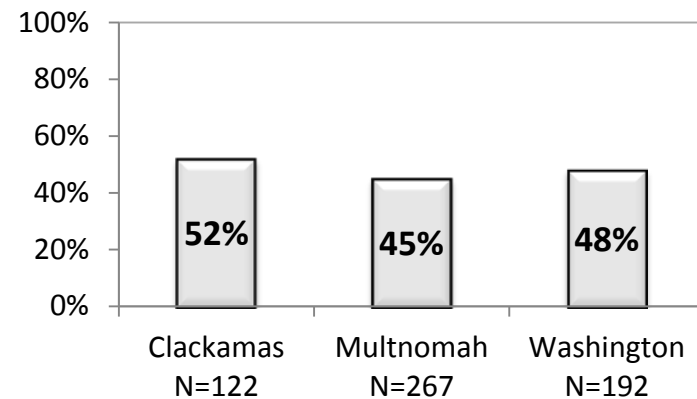


Drive Less Save More shows highest awareness in Clackamas County and among women

Awareness of Drive Less Save More

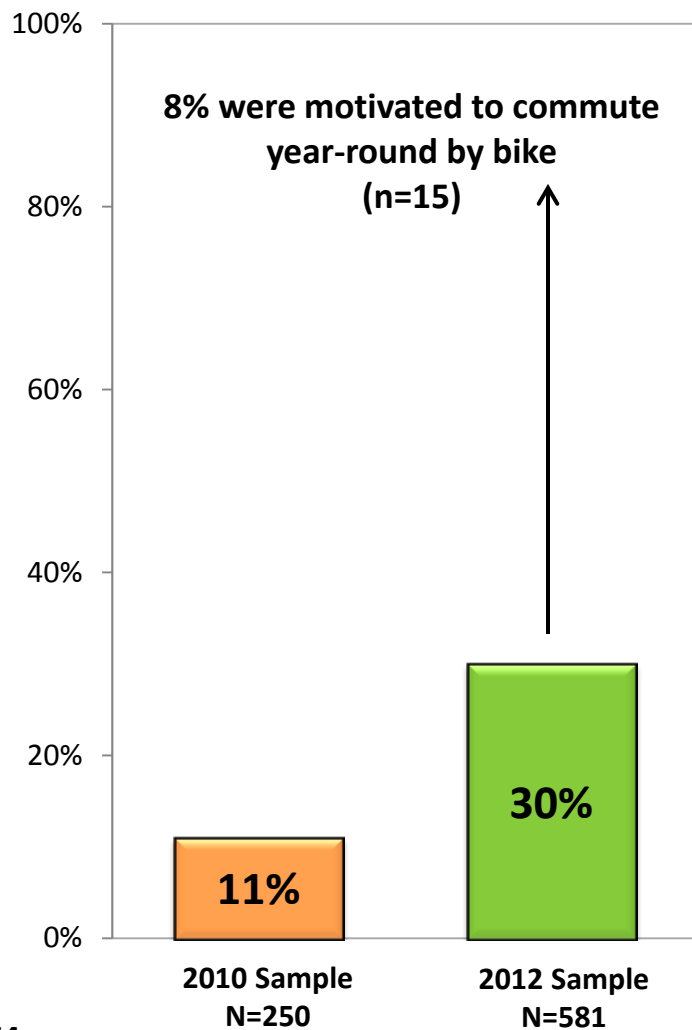


- **Clackamas County**
- **Age 35-54**
- **Female (52%), Male (43%)**
- **HH Income \$25K - \$75K**

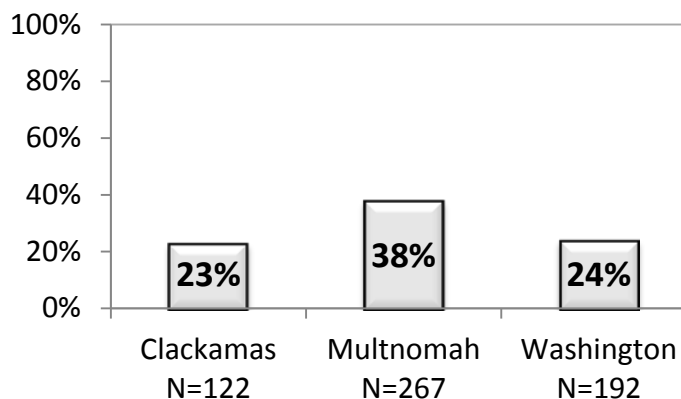


Awareness of BTA Bike Commute Challenge is greatest among Multnomah County residents and those in households of higher income

Awareness of BTA Bike Commute Challenge

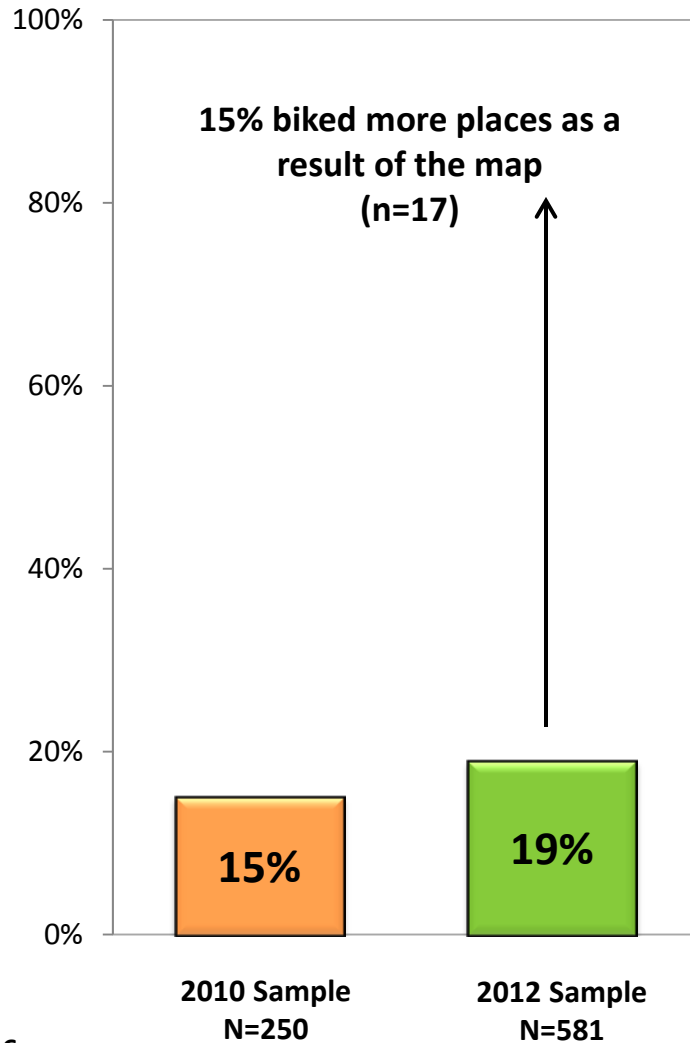


- **Multnomah County**
- **Age 25-54**
- **Female (32%), Male (29%)**
- **HH Income \$75K+**

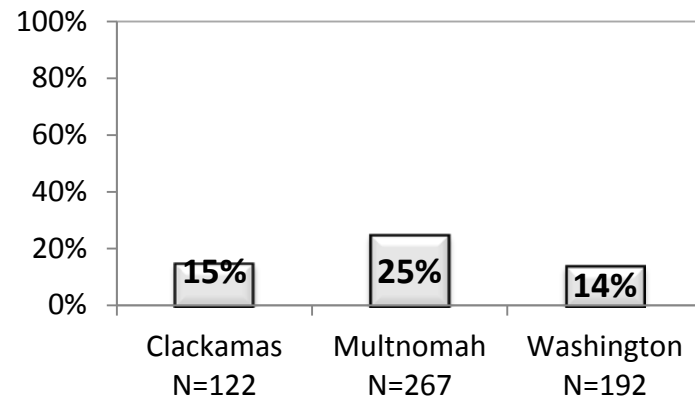


Those from Multnomah County are most aware of Bike There! Maps

Awareness of Bike There! Maps

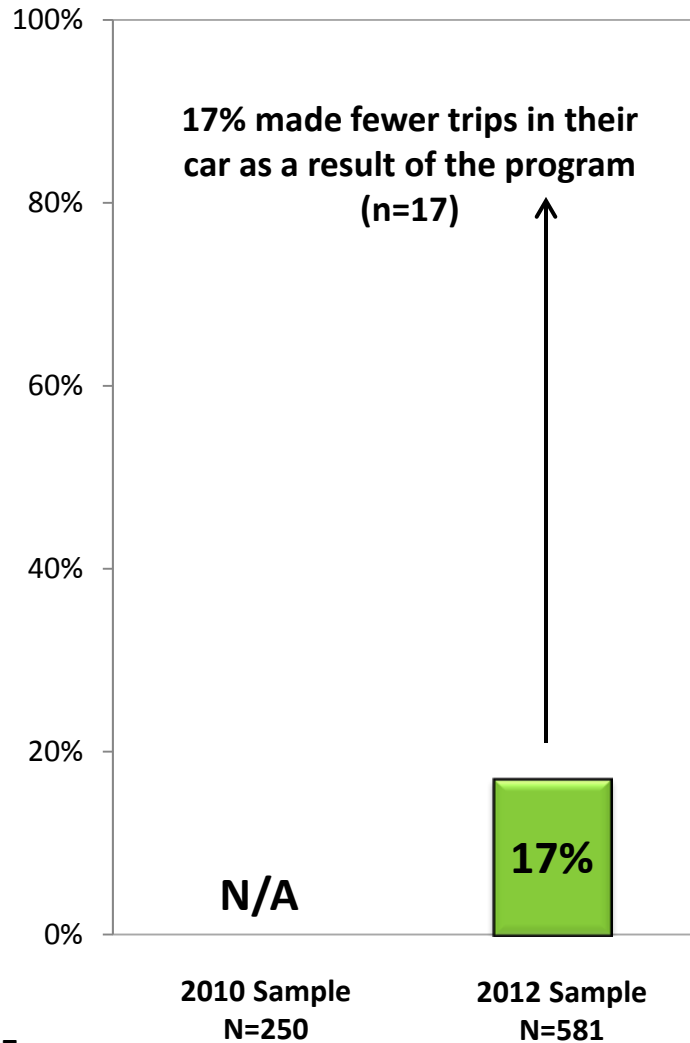


- **Multnomah County**
- **Age 35+**
- **Male (20%), Female (19%)**
- **HH Income \$75K+**

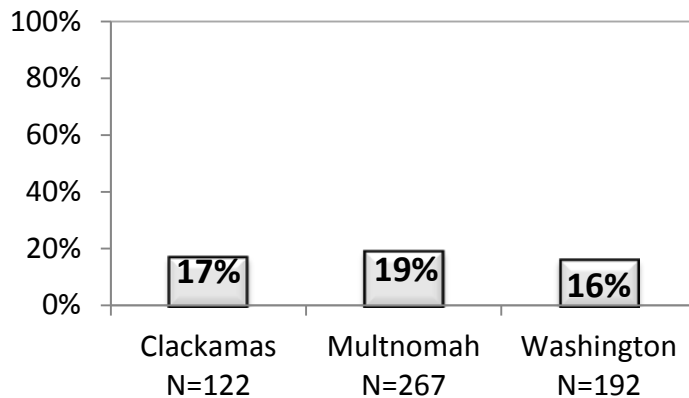


Participants from the youngest and oldest age groups are most aware of the Drive Less Connect program

Awareness of Drive Less Connect

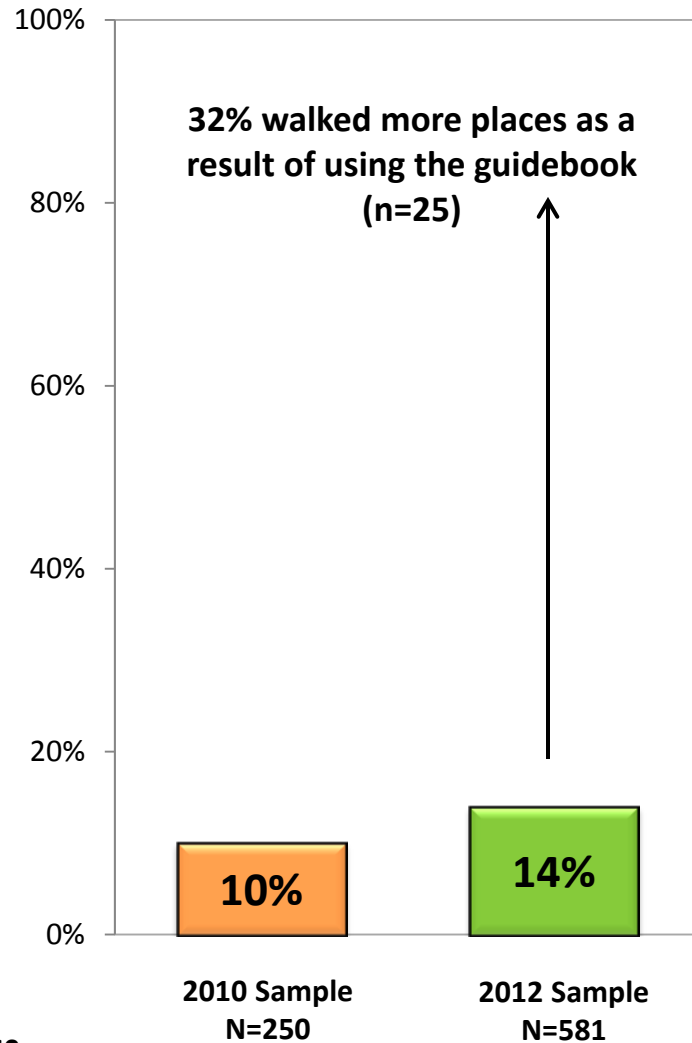


- Clackamas, Multnomah and Washington counties
- Age 16-24 and 55+
- Female (18%), Male (16%)
- HH Income \$25K - \$50K

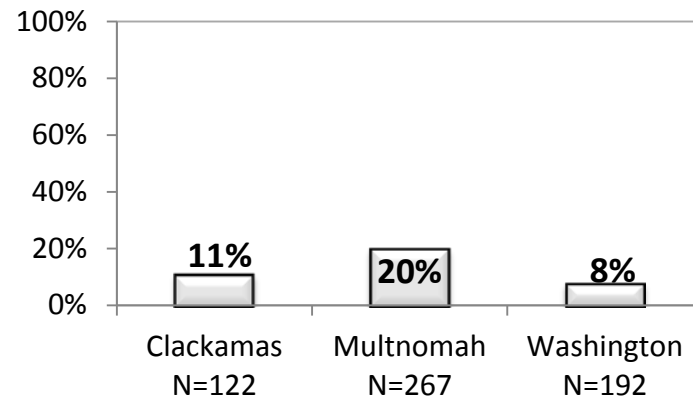


Awareness of Walk There! Guide Book is most prevalent among Multnomah County residents and the younger and oldest age groups

Awareness of Walk There! Guidebook

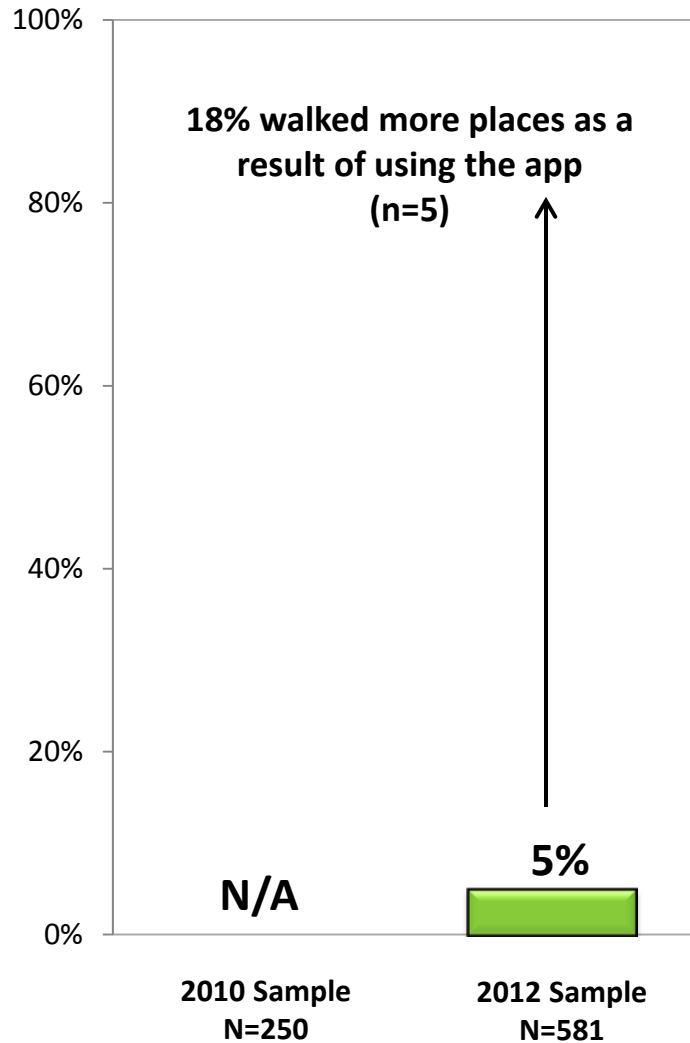


- **Multnomah County**
- **Age 25-34 and 55+**
- **Female (19%), Male (10%)**
- **HH Income \$25K - \$75K**

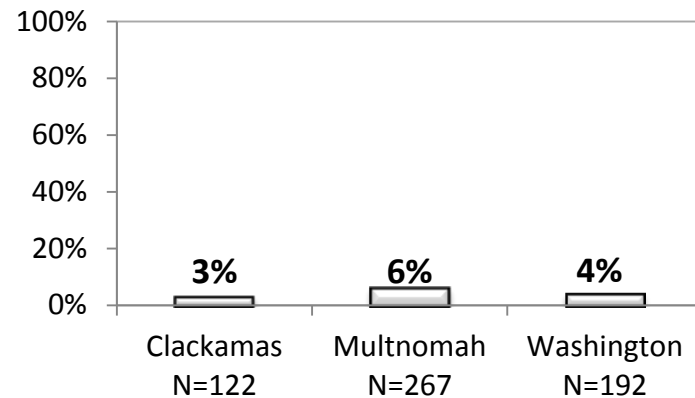


Awareness of Walk There! App is most prevalent among Multnomah County residents and the youngest age groups

Awareness of Walk There! App

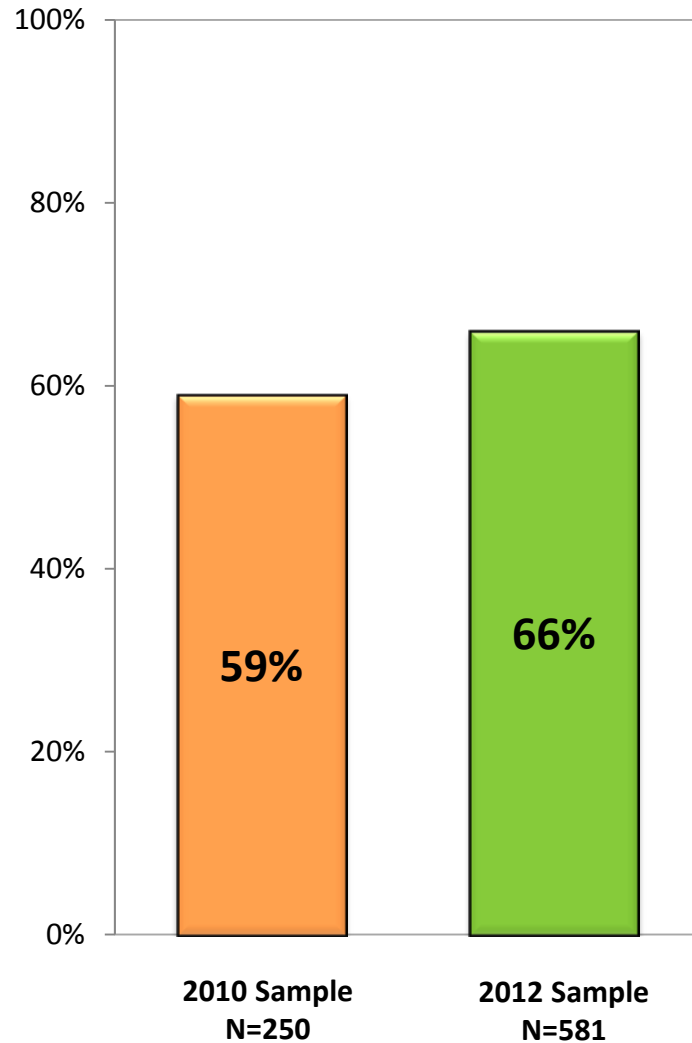


- Multnomah County
- Age 16-34
- Female (6%), Male (3%)
- HH Income \$25K - \$75K

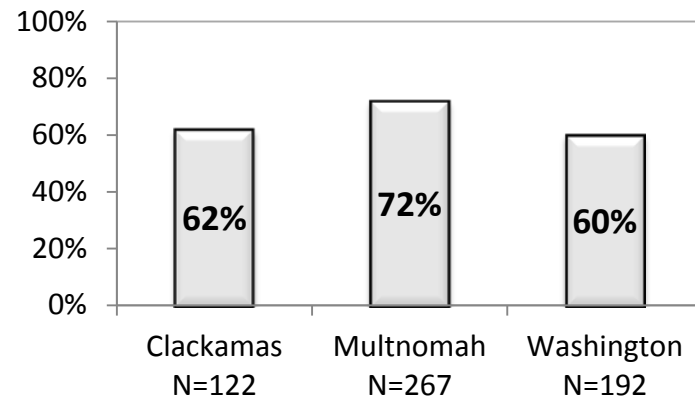


Younger respondents, residents of Multnomah County, and women are most likely to be aware of TriMet Trip Planner

Awareness of TriMet Trip Planner

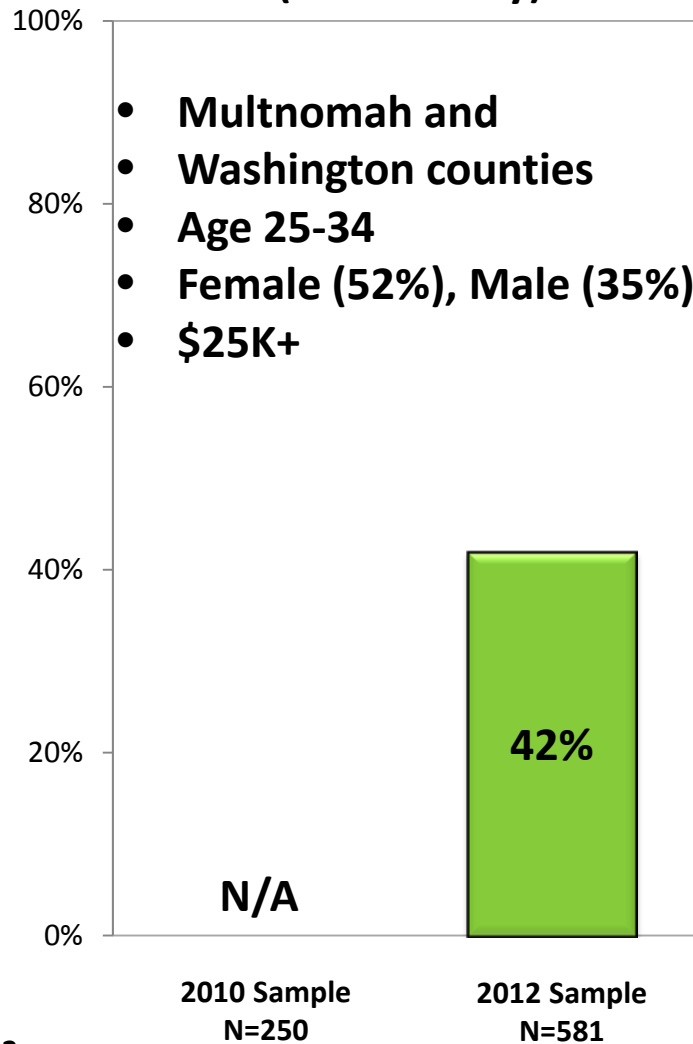


- **Multnomah County**
- **Age 25-34**
- **Female (73%), Male (59%)**
- **All HH Income Levels**

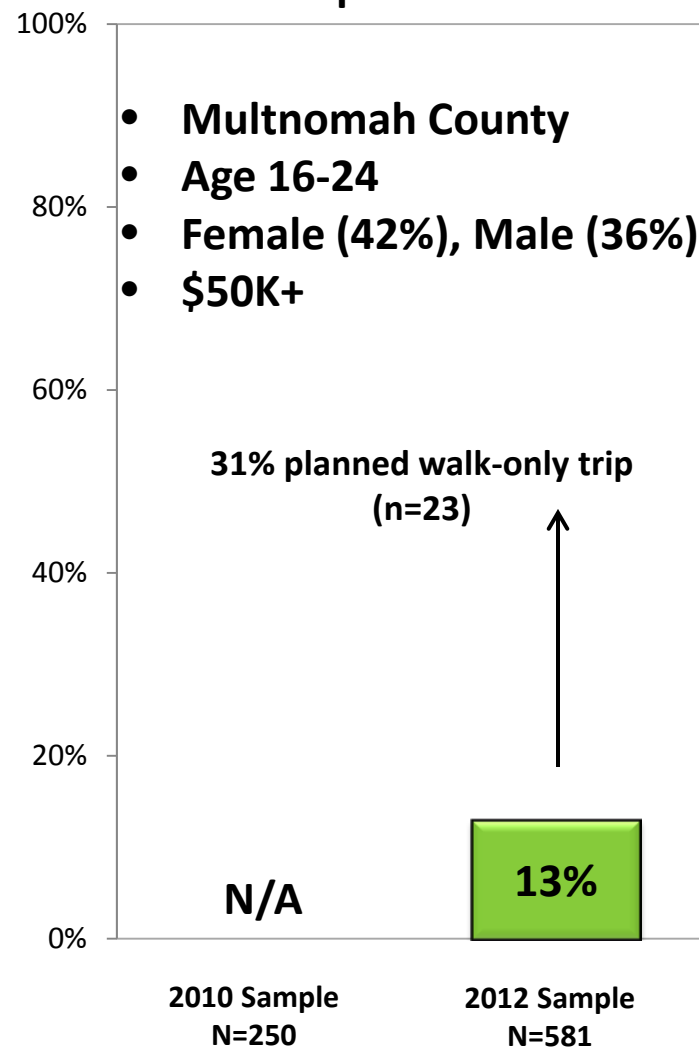


Younger respondents, residents of Multnomah County, and women are most likely to be aware of TriMet Trip Planner

Usage of TriMet Trip Planner (Transit Only)

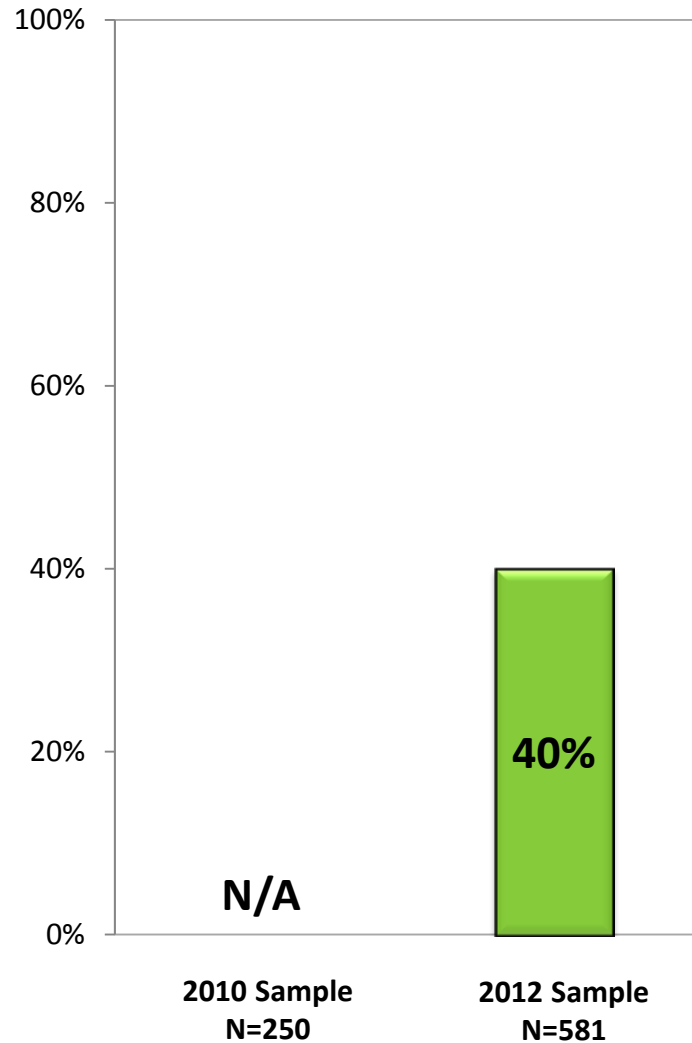


Awareness of TriMet Map Trip Planner

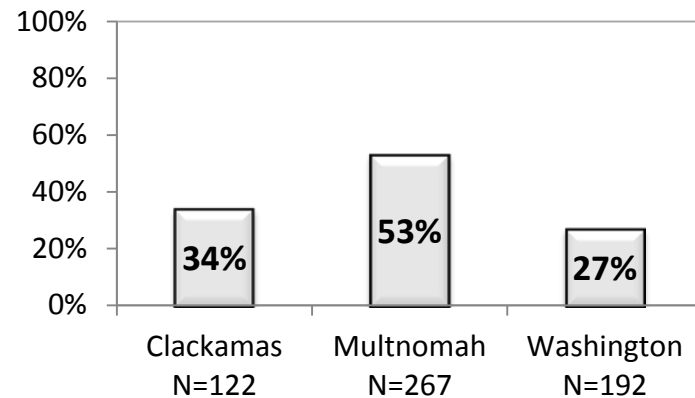


Awareness of Sunday Parkways or Sunday Streets in most prevalent among younger respondents, those from Multnomah County and women

Awareness of Sunday Parkways or Sunday Streets

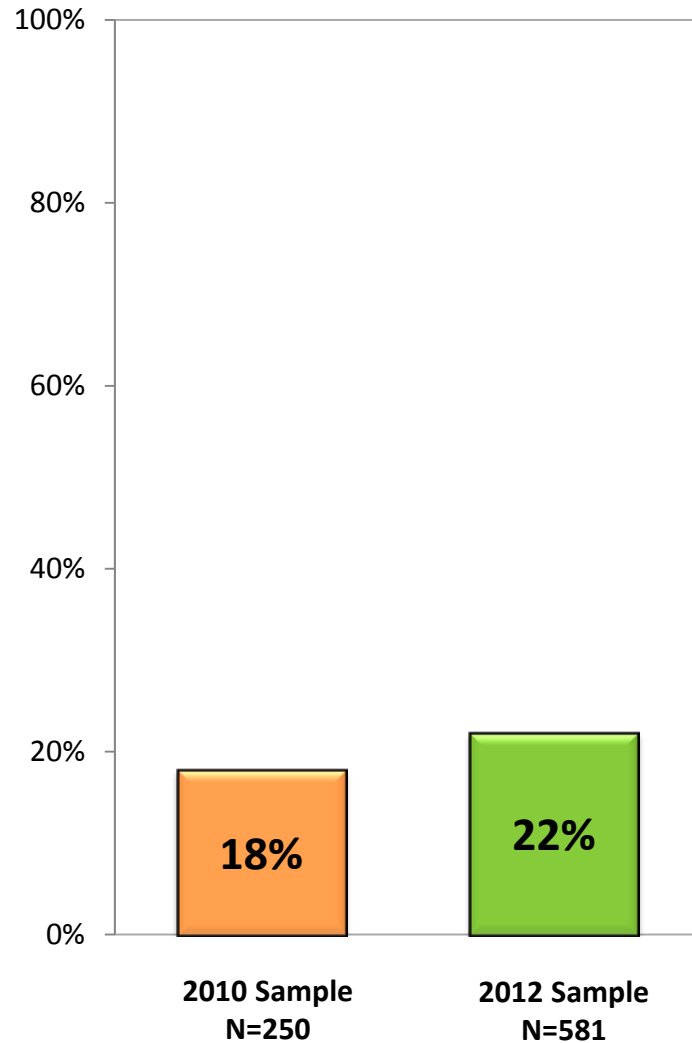


- **Multnomah County**
- **Age 25-34**
- **Female (43%), Male (38%)**
- **HH Income \$25K - \$75K**

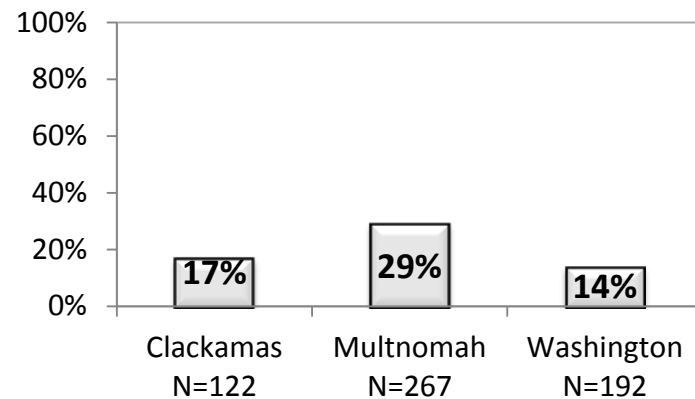


Residents from Multnomah County are most likely to be aware of Portland Smart Trips

Awareness of Portland Smart Trips

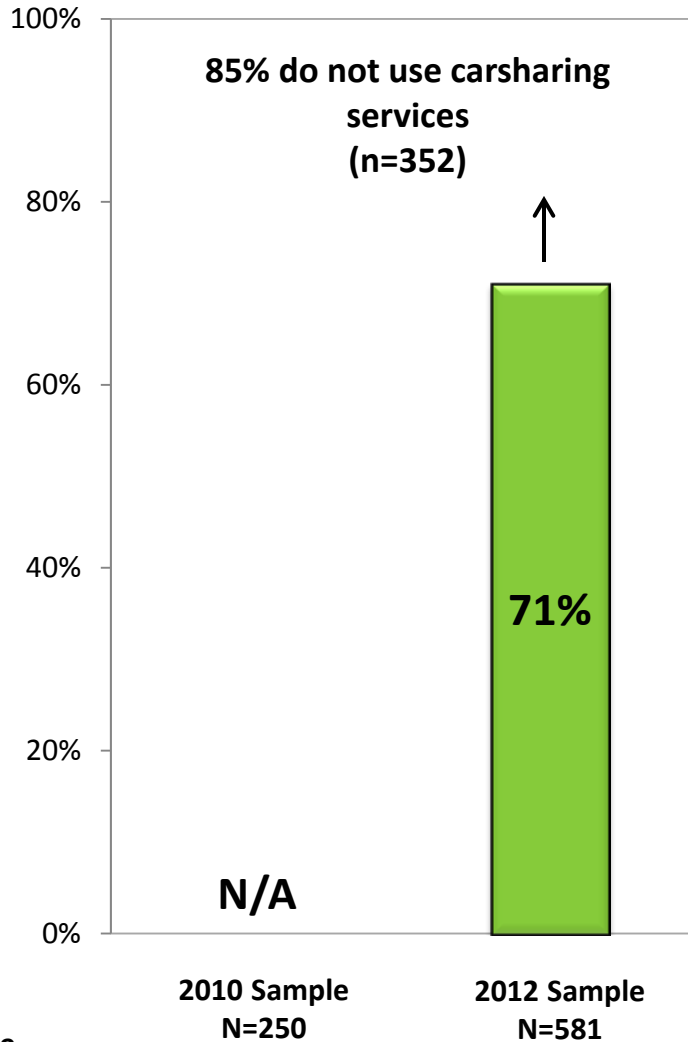


- **Multnomah County**
- **Age 25-54**
- **Female (23%), Male (21%)**
- **HH Income \$50K - \$75K**

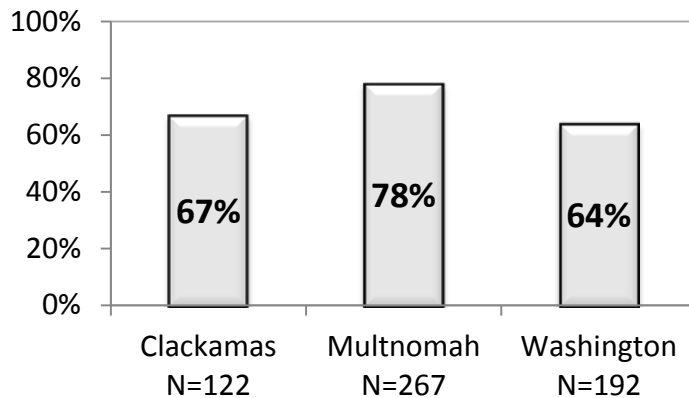


Younger participants and those from Multnomah County are most aware of Carsharing services such as ZipCar and Car2Go

Awareness of Carsharing Services

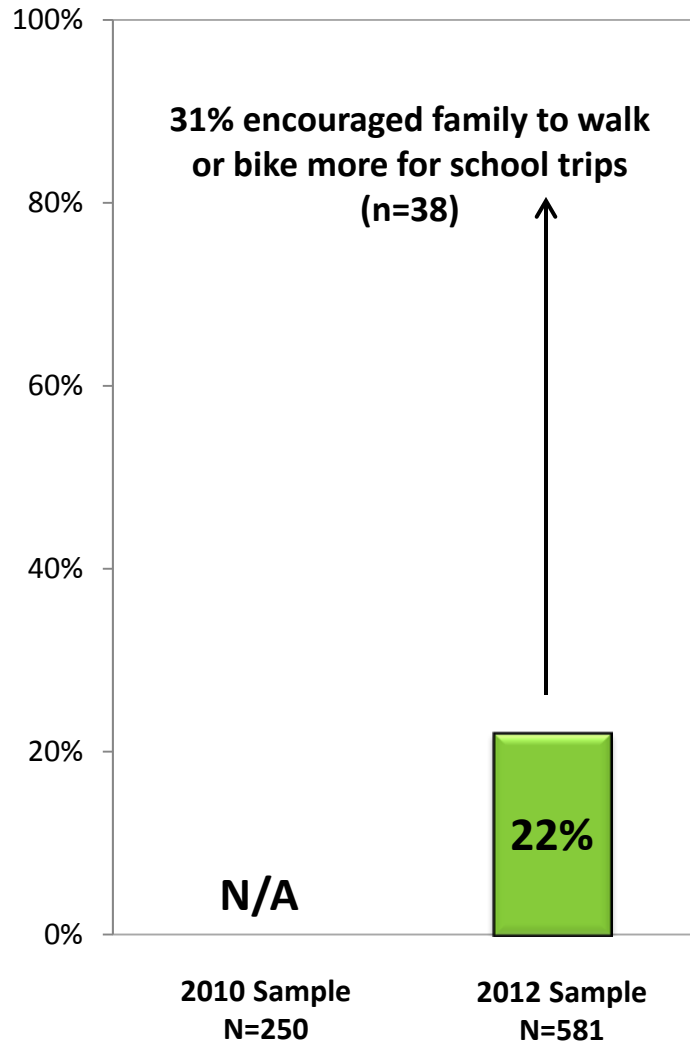


- **Multnomah County**
- **Age 25-54**
- **Female (72%), Male (70%)**
- **HH Income \$25K - \$75K**

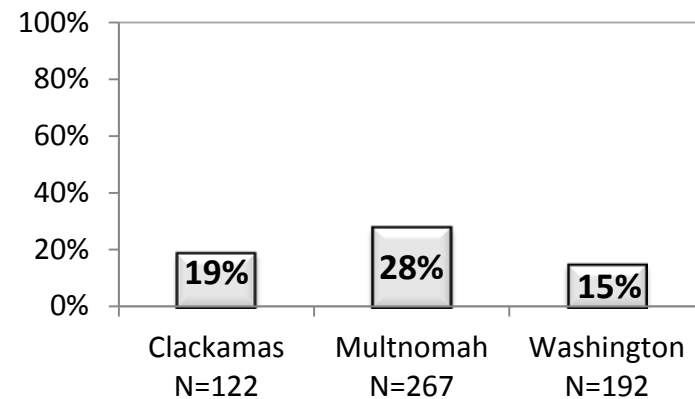


Women and those from Multnomah County are more aware of the Safe Routes to School program.

Awareness of Safe Routes to School



- **Multnomah County**
- **Age 35-54**
- **Female (26%), Male (17%)**
- **HH Income \$25K - \$50K**



SUMMARY: Program Awareness

- **Awareness is highest:**
 - Multnomah County
 - Younger residents
 - Females
- **Increases in program awareness:**
 - Bike Commute Challenge + 19%
 - Drive Less Save More + 14%
 - Walk There! Guidebook or App + 10%
 - TriMet Trip Planner + 7%
 - Bike There! Maps +4%

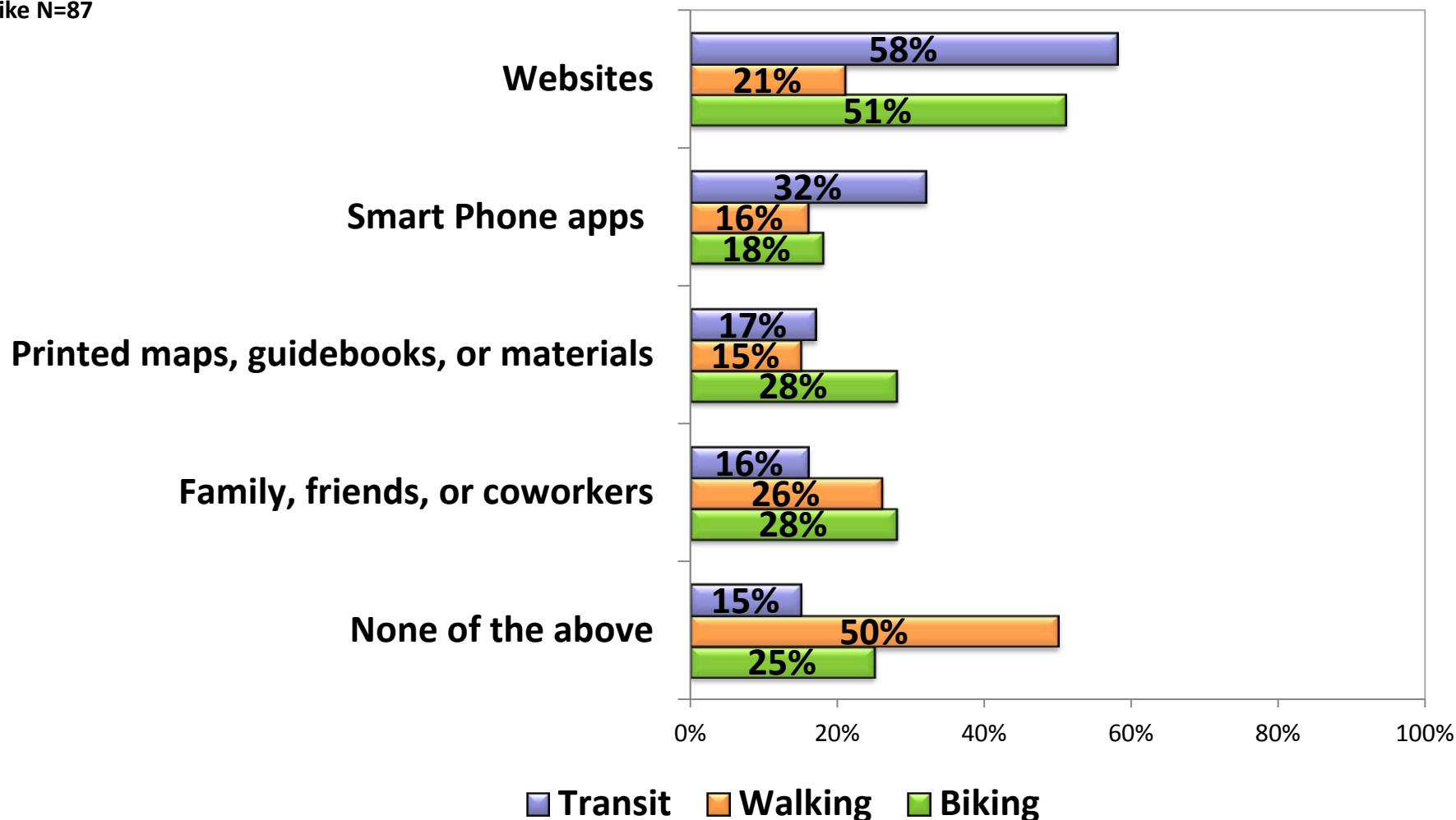
4.

COMMUNICATION TRENDS

Web is primary resource for getting information about transit and biking (among daily/weekly/monthly users)

Transit N=179
Walking N=262
Bike N=87

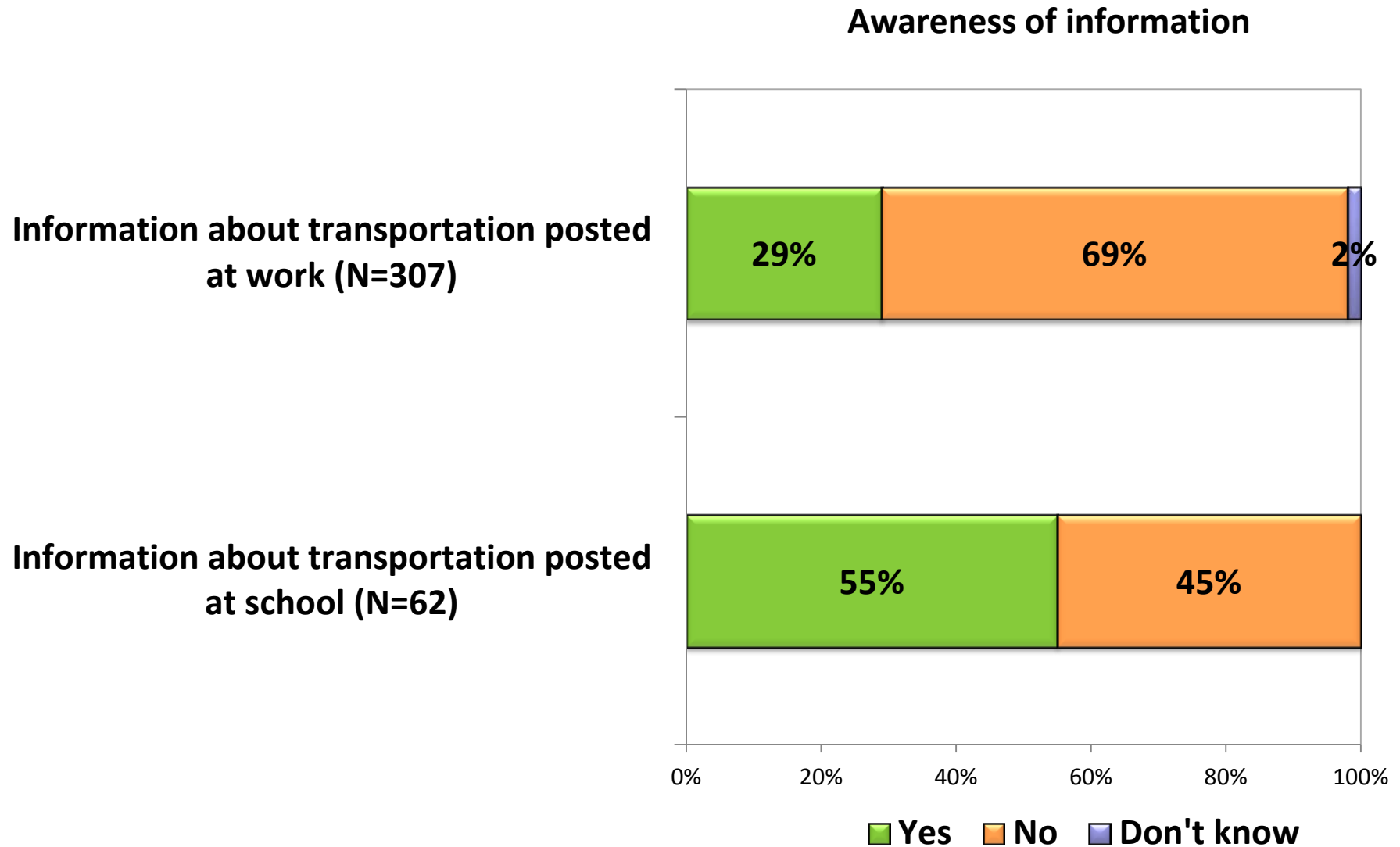
Where Do Users of ____ Mode get information About ____ Mode...?



- **Information trends to continue monitoring:**

- Digital sources (web and smart phone apps) are increasing in popularity as a source for information.
- Non-digital sources (printed maps and guidebooks) are seeing a slight decrease in use.

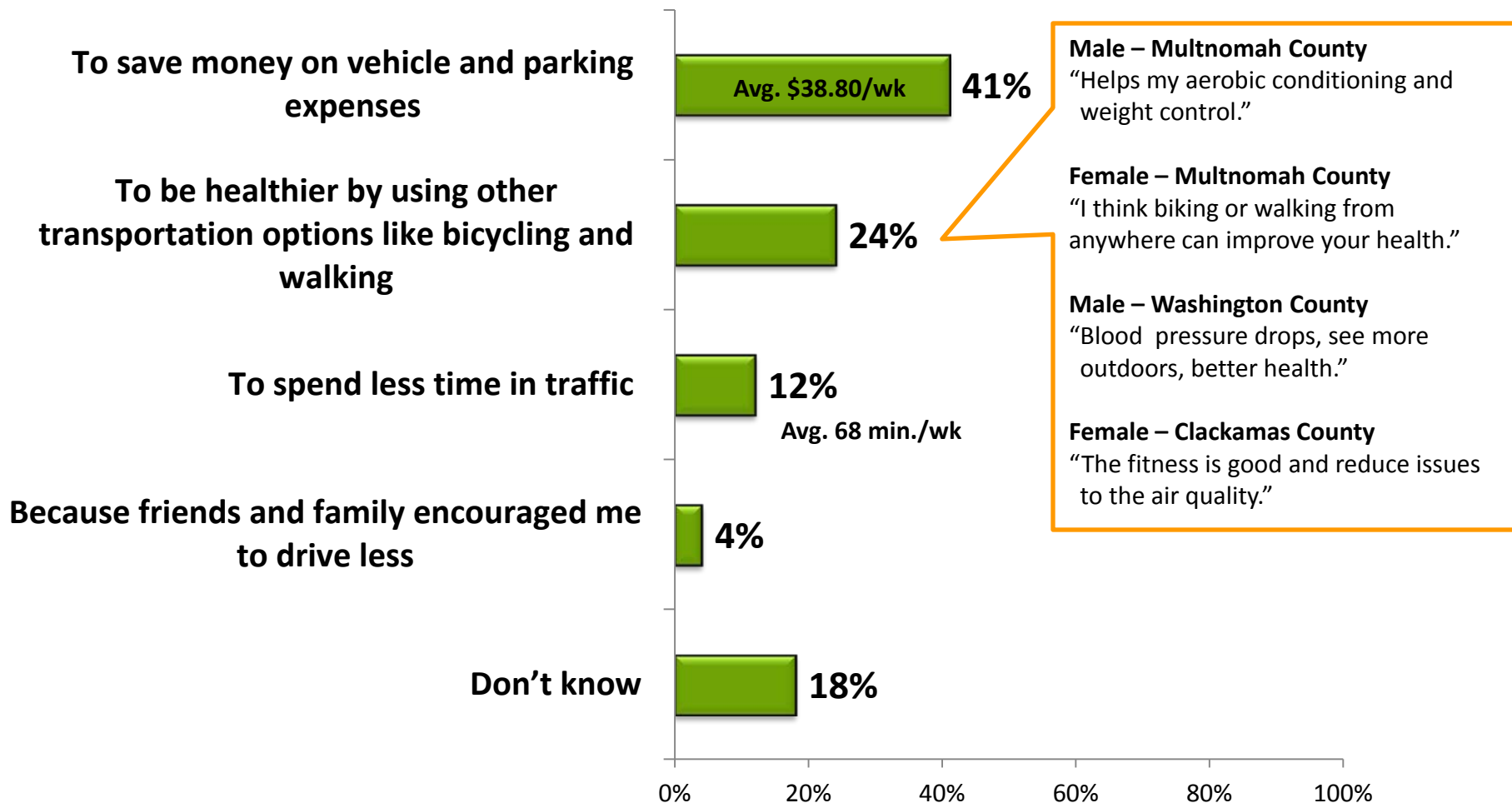
Employer programs reach more than one fourth of employees



Residents self-report that saving money is their biggest motivator to reduce the amount of driving

2012 Sample N=581

Best reason to reduce the amount you drive:

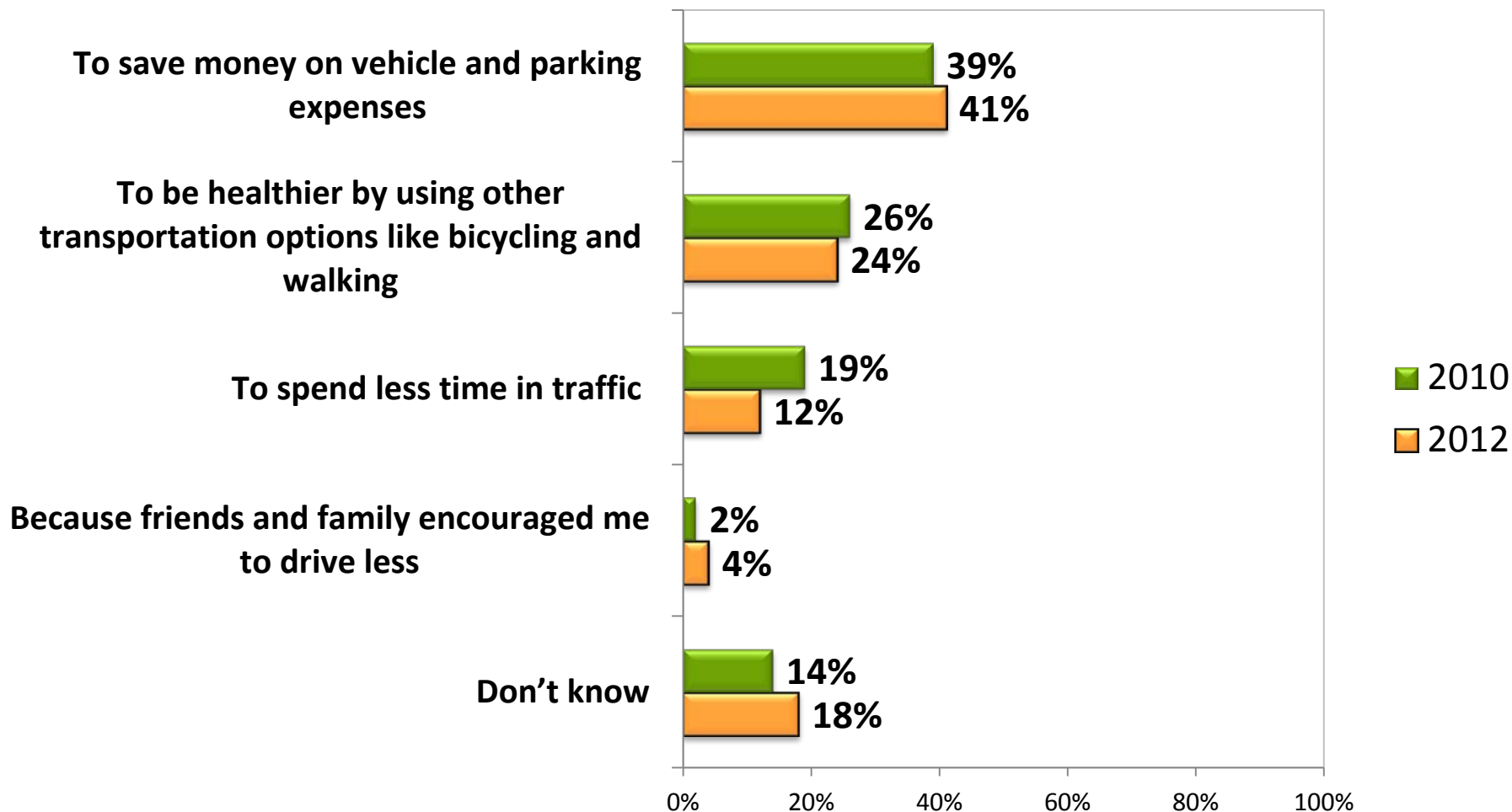


Results remain similar over the past two years

2012 Sample N=581

2010 Sample N=250

Best reason to reduce the amount you drive:



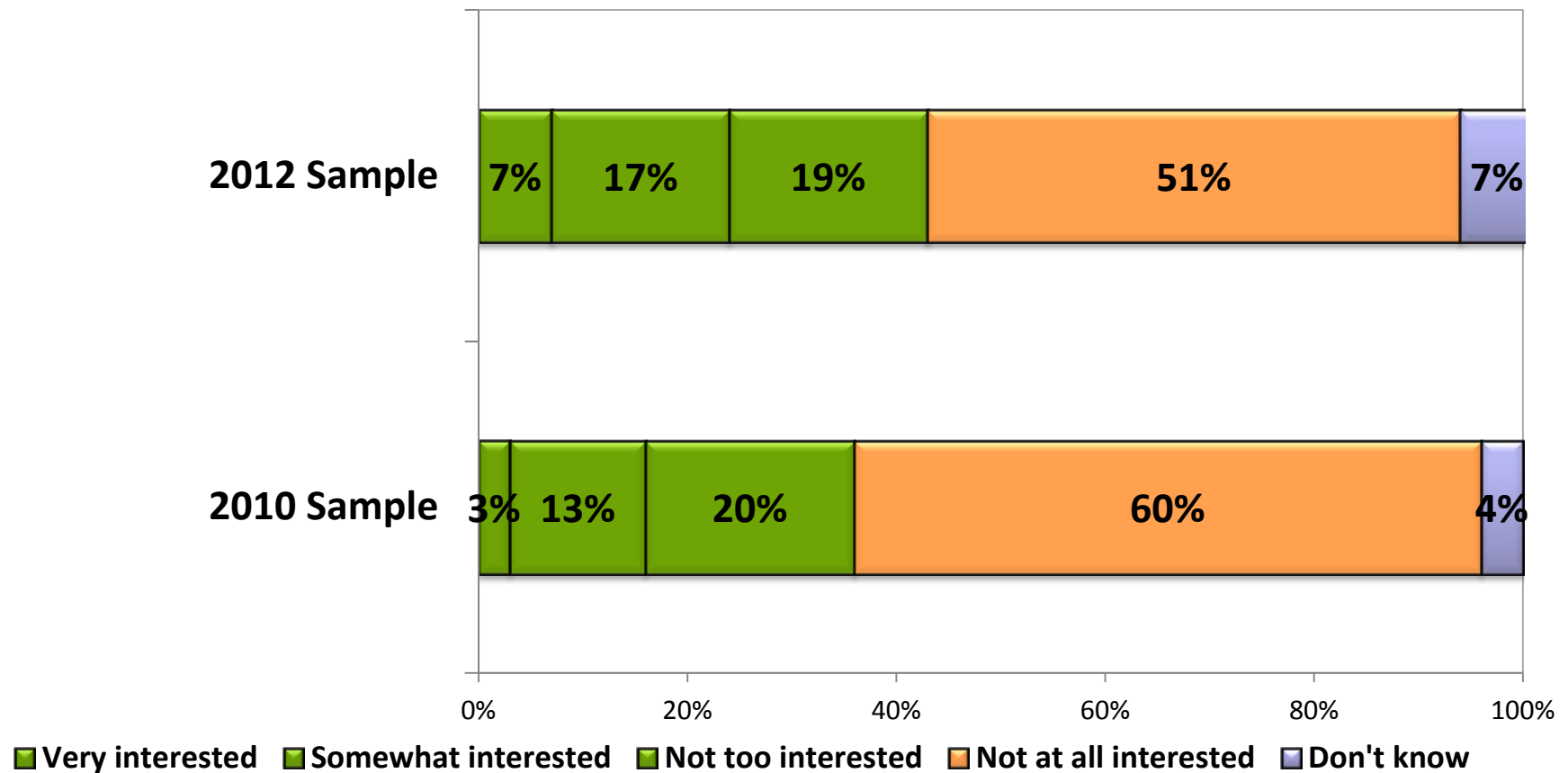
* No major subgroup differences

Interest in learning more about transportation options has increased slightly from 2010 figures

2012 Sample N=581

2010 Sample N=250

Interest in Learning about Transportation Options:



- **Websites are a key source for transportation information**
- **Based on awareness of information posted at work, employer programs appear to be reaching about one fourth of those employed**
- **Transportation information posted in schools was noticed by more than half of students surveyed**

5.

INTERMEDIATE RECOMMENDATIONS

INTERMEDIATE RECOMMENDATIONS

- **Continue outreach on travel options**
 - Increase in awareness shows some adoption of travel options
- **Conduct a third study to validate trends**
- **Messaging targeted at those already using travel options should be more about where to go for information than what alternative methods currently exist**



Metro

Regional Travel Options

2012 Travel and Awareness Survey Findings

March 15, 2013



Metro | *Making a great place*

Survey Team

- RTO Staff, project lead by Caleb Winter and Derek Hofbauer
- DHM Research
 - Su Midghall
 - James Kandell
- EnviroMedia
 - Jennifer Gilstrap
 - Ryan Gallagher

Purpose

- Complete an important component of the comprehensive RTO evaluation conducted every two years:
 - Measure and track awareness.
- Support strategic and cost-effective implementation of marketing goals:
 - Identify markets most likely to reduce single occupant vehicle (SOV) trips and increase frequency of using travel options.

An orange vertical bar on the left side of the slide, featuring a faint, stylized map of a city street grid.

Frequency

Daily drivers also...

- Walk daily, weekly, monthly (32%)
- Use transit daily, weekly, monthly (16%)
- Bike daily, weekly, monthly (6%)

Frequency

	<i>DAILY</i>	<i>WEEKLY</i>	<i>MONTHLY</i>	<i>RARELY</i>	<i>NEVER</i>
CAR / DRIVING	54%	31%	3%	4%	7%

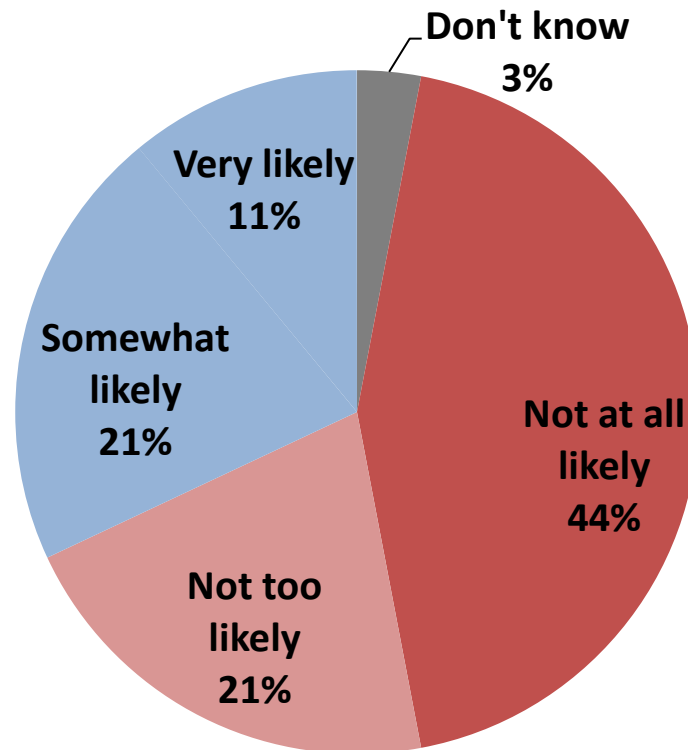
	<i>DAILY</i>	<i>WEEKLY</i>	<i>MONTHLY</i>	<i>RARELY</i>	<i>NEVER</i>
BICYCLING	3%	6%	7%	13%	72%
Daily, Weekly or Monthly = 16%			Rarely or Never = 85%		

	<i>DAILY</i>	<i>WEEKLY</i>	<i>MONTHLY</i>	<i>RARELY</i>	<i>NEVER</i>
WALKING	13%	20%	13%	21%	34%
Daily, Weekly or Monthly = 45%			Rarely or Never = 55%		

	<i>DAILY</i>	<i>WEEKLY</i>	<i>MONTHLY</i>	<i>RARELY</i>	<i>NEVER</i>
PUBLIC TRANSIT	7%	13%	12%	32%	37%
Daily, Weekly or Monthly = 32%			Rarely or Never = 69%		

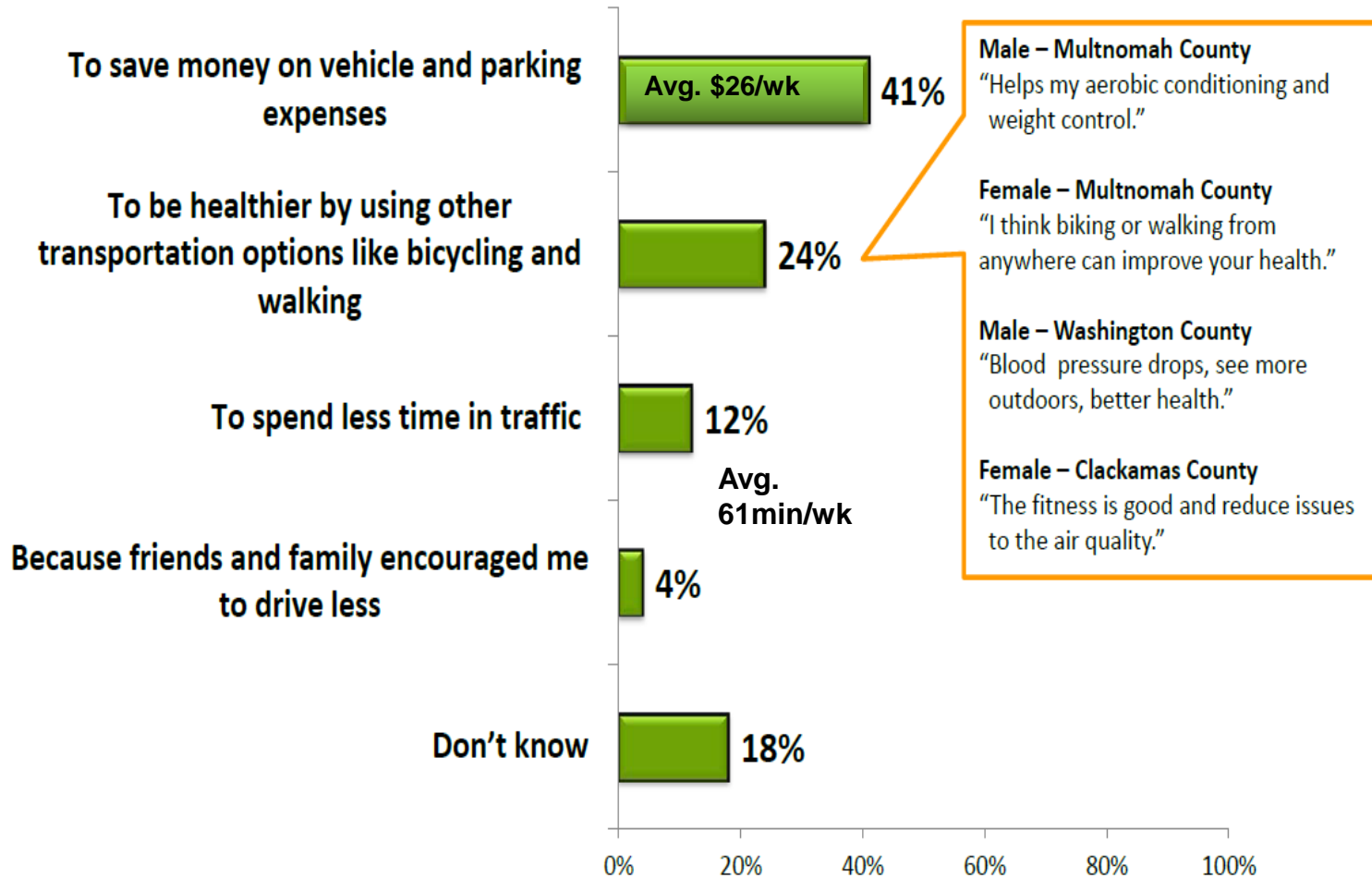
Testing carpool incentive

Commuters were asked: If you could receive a \$50 monthly voucher, how likely would you be to start commuting by carpool in the next six months?



Message/Motivation

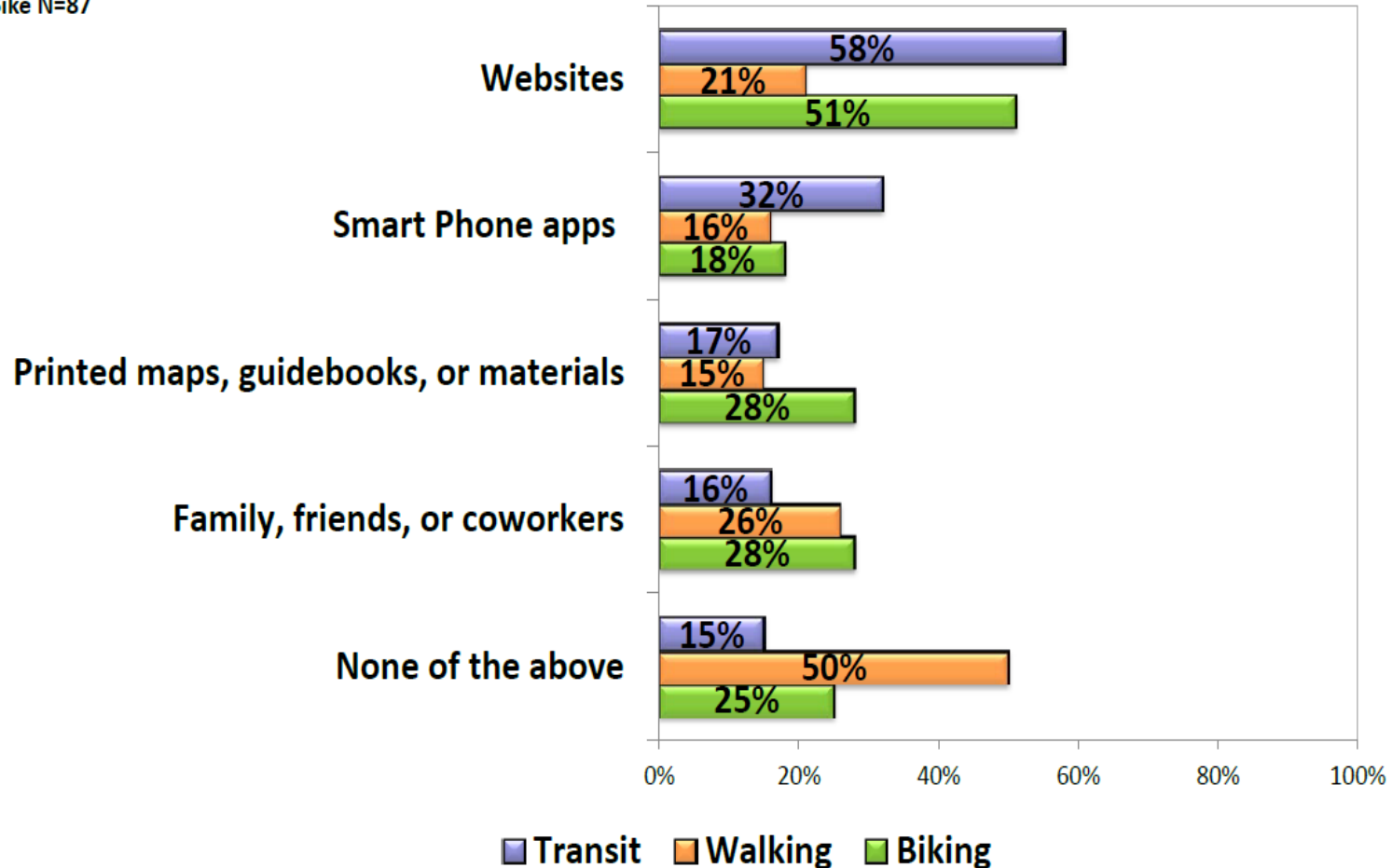
Best reason to reduce the amount you drive:










Information sources

Transit N=179
Walking N=262
Bike N=87

Where Do Users of ____ Mode get information About ____ Mode...?



Awareness

	2010 (N=250)	2012 (N=581)	Change <i>percentage points</i>
	59%	66%	+7
	34%	48%	+14
	N/A	17%	new
	18%	22%	+4
	N/A	40%	new
	N/A	22%	new
	11%	30%	+19

Major findings

- Awareness has increased over the last two years for all RTO programs
- Ripe audience for programs and services among the “Generation Y” age group
- Respondents who use travel options daily, weekly or monthly were twice more likely to use those options for errands or leisure than for commuting.
- Weekly and monthly travel options users do so primarily for health and financial reasons



Major Findings

- Most respondents were satisfied with their travel options experiences but were least satisfied with safety (e.g., awareness for bicyclists by car drivers)
- Respondents living and working in areas with good access to amenities and above average infrastructure generally drive less, use options more frequently and are more satisfied with biking, walking, and transit

Relevance to Marketing

- Tailor marketing strategies to receptive audiences (e.g., support, grow)
- Focus on easier audiences such as Gen Y
- Messages should combine saving money and health to reach grow audiences
- Digital information is increasingly preferred

An orange vertical bar on the left side of the slide, featuring a faint, stylized map of a city street grid.

Questions?

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503-797-1766

RESEARCH (REVISITED)

2012 RTO TRAVEL + AWARENESS SURVEY

Why research?:

1. Measure awareness and use of RTO programs
2. Identify markets willing to reduce SOV trips
3. Understand barriers to adopting active travel options
4. Inform implementation of the RTO Strategic Plan and marketing strategy (incl. messaging)
5. Use results to help guide 2013 grant applications
6. Benchmarking trends overtime

TRAVEL BEHAVIORS (as transportation not recreation)



54% daily drivers

88% daily + weekly + monthly

7% never

Adults 35-54

HHI > \$50K

Clackamas + Washington Counties



7% daily transit

32% daily + weekly + monthly

37% never

Adults 16-34

HHI < \$25K

Multnomah County



3% daily bikers

16% daily + weekly + monthly

72% never (69% have access)

Adults 16-34 (Male)

HHI > \$100K

Multnomah County



13% daily walkers

46% daily + weekly + monthly

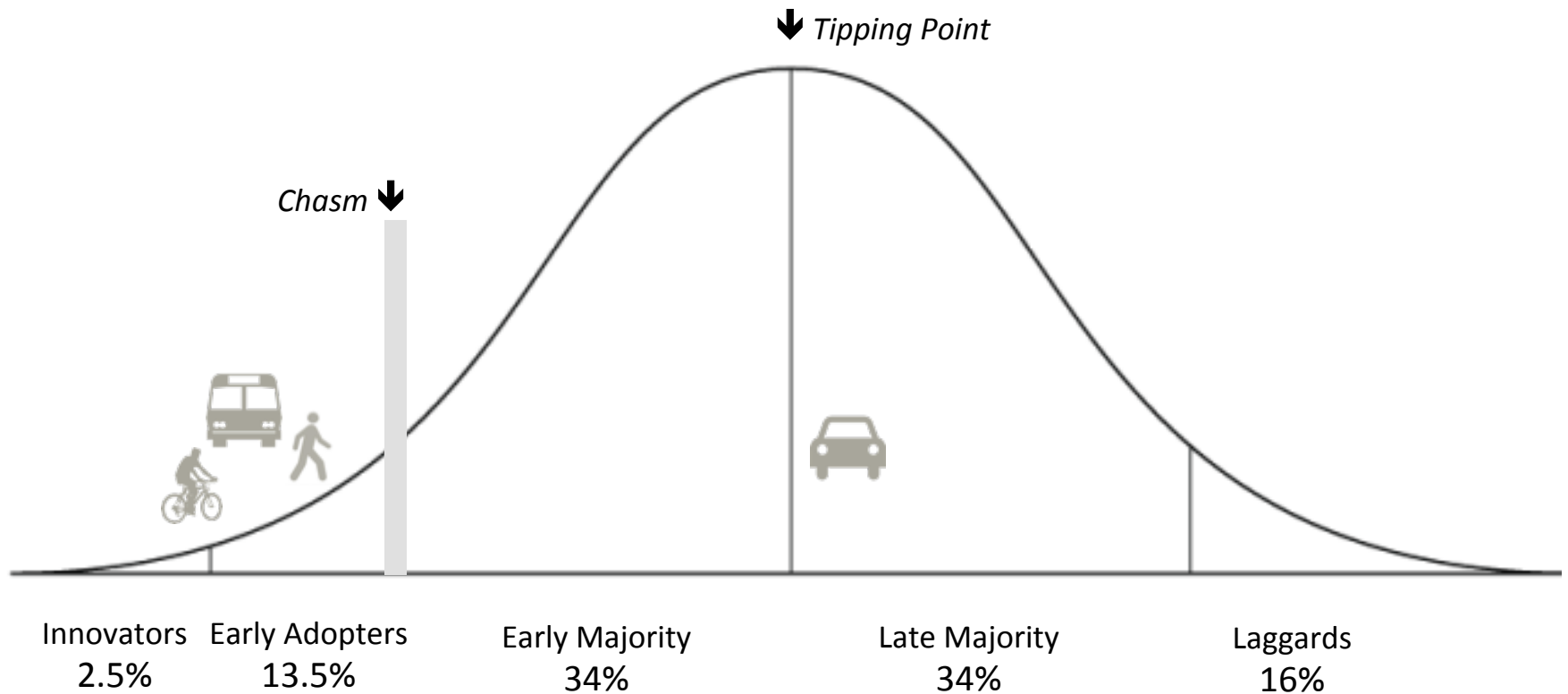
34% never

Adults 25-34

HHI < \$25K

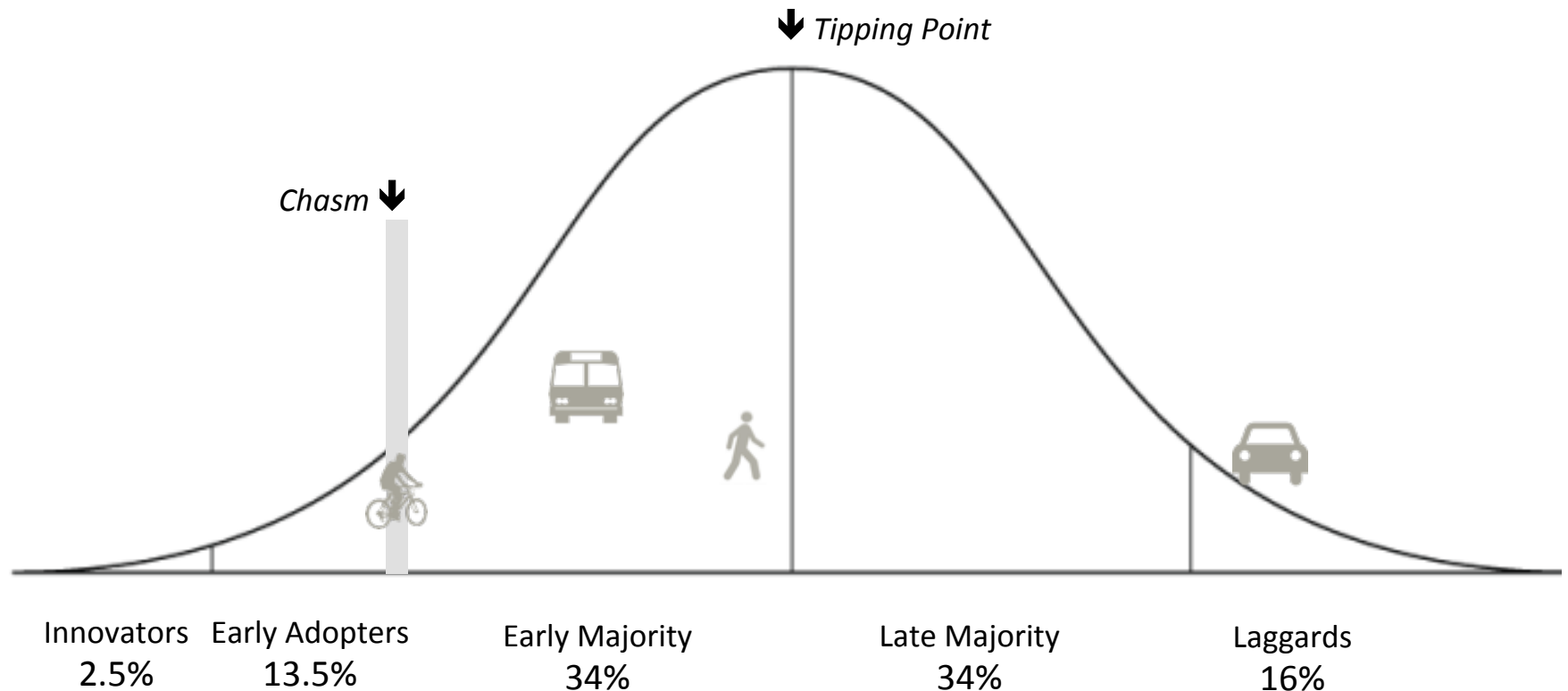
Multnomah County

ADOPTION: DAILY



SUPPORT		GROW		TOUGH	
Visionary		Pragmatic		Conservative	Skeptical

ADOPTION: DAILY + WEEKLY + MONTHLY



SUPPORT

GROW

TOUGH

Visionary

Pragmatic

Conservative

Skeptical

USER GROUPS BY MODE



DRIVERS

69% commute by car alone (SOV)

41% would use public transit if they didn't have access to a car
30% have considered carpooling or vanpooling



TRANSIT RIDERS

48% use the bus, 37% MAX, 5% Streetcar...

24% use transit to get to work, 52% shopping/errands
86% are satisfied with their transit experience
Least satisfied with frequency and reliability of service



BIKERS

32% bike to work (middle incomes, 45-64, Mult. Co.)

59% bike for shopping or errands, 67% for leisure activities
92% are satisfied with their bicycling experience
28% are not satisfied with the awareness for bicyclists by cars



WALKERS

15% walk to work (middle incomes, 25-44), 7% walk to school

65% walk for shopping or errands, 70% for leisure activities
91% are satisfied with their walking experience
20% are not satisfied with the awareness by cars and cyclists

TOP PROGRAM AWARENESS



66% aware, 63% planned a transit-only trip, 17% multi-modal
Highest awareness = transit users, woman (73% vs. 59%), younger adults 16-44 and Multnomah Co. residents



48% aware, 33% recalled seeing it on television
Highest awareness = older adults 45-64, woman (52% vs. 43%), white residents



40% aware
Highest awareness = middle incomes (\$25K-\$74K), 25-64, Mult. Co. residents



30% aware, 8% were motivated to bike year-round
Highest awareness = 25-64, access to a bike, motivated by health, Mult. Co.



22% aware
Highest awareness = Multnomah Co. residents, aware of Sunday Parkways



22% aware
Highest awareness = Multnomah Co. residents, women and those aware of Sunday Parkways

TOP PROGRAM AWARENESS



20% aware, 68% aware of the guidebook, 23% aware of app,
32% walked more as a result of using the map

Highest awareness = adults 45-64, women, Mult. Co. residents, aware of Sunday Parkways, motivated by health over savings



19% aware, 15% biked more as a result of using the map

Highest awareness = Mult. Co. residents, aware of Sunday Parkways,
motivated by health over savings, have access to a bike



17% aware, 30% recalled seeing it on television,
17% made few car trips

Highest awareness = older, established residents (45-64, 11+yrs), aware of DLSPM

Awareness is important, but isn't always enough to spur action.



71% aware of carsharing options, 85% don't use it

Highest awareness = general population 16064, income \$25K+, Mult. Co.,
white... equally high awareness from Daily Drivers

MESSAGING

Reasons why people might reduce the amount they drive:



41% say to save money... avg. \$40 per week (\$2,080/yr)
Younger adults 16-44, middle incomes \$50K-\$74K, those receptive to transit and carpooling



24% say to be healthier... 45% exercise, 21% cardio / heart, 17% lose weight... middle-aged adults, high income, bikers and walkers



12% say to spend less time in traffic... avg. 68min per week, resonated with adults 45-64

18% don't know what would make them change the amount they drive. 38% of adults 65+, and higher among lower incomes

DEEPER DIVE INTO THE DATA

We are still working on...

- Audience demographic analysis
- Geographic analysis (context tool)
- Vancouver data
- Cross-referencing other research
- Final report

AUDIENCE SURVEY (REVISITED)

A FEW KEY FINDINGS

- Travel options behaviors all trending in the right direction
- Adults 16-24 show higher use / potential for travel options
- Men and women have similar travel habits, except for biking
- Travel options users twice as likely to use for errands or leisure than commuting to work or school
- Most are satisfied with their travel options experiences – with safety being a common dissatisfaction
- Programs continue to gain in awareness, but most still under 50% across the region – most aware in Multnomah Co.
- Helped identify “grow” audiences to target and convert

TRAVEL HABITS *(as transportation not recreation)*



54% daily drivers

88% daily + weekly + monthly

7% never

Higher incidence

62% A25-44 vs. 46% A16-24 daily drivers
95% Wash., 91% Clack., Mult. 83% D/W/M
87% men vs. 85% women D/W/M
88% of D/W/M have access to a bike



13% daily walkers

46% daily + weekly + monthly

34% never

54% A16-24, 44% 25-44, 33% 45-64 D/W/M
48% men vs. 42% women D/W/M
59% Mult., 36% Wash., 29% Clack. D/W/M



7% daily transit

32% daily + weekly + monthly

37% never

52% A16-24, 30% 25-44, 20% 45-64 D/W/M
35% men vs. 28% women D/W/M
39% Mult., 25% Clack., 23% Wash. D/W/M



3% daily bikers

16% daily + weekly + monthly

72% never (69% have access)

20% A16-24, 17% 25-44, 14% 45-64 D/W/M
20% men vs. 10% women D/W/M
21% Mult., 9% Wash., 9% Clack., D/W/M
Bike access equal across age, gender, race,
country, driving freq... Diff. incomes \$75K+

COMMUTING HABITS > BY MODE



DRIVERS

69% commute by car alone (SOV) – 83% of daily drivers

41% would use public transit if they didn't have access to a car

30% have considered carpooling or vanpooling

Only 12% pay to park



BIKERS

32% commute to work (59% A45-64) – men + women equally

6% bike to school – 9% male vs. 2% female

59% bike for shopping or errands, 67% for leisure activities

28% not satisfied with safety – awareness by cars



TRANSIT RIDERS

24% commute to work (40% A25-44) – men + women equally

15% ride to school (26% A16-24) – 27% Clack., vs. 10% Mult.

52% for shopping/errands, 58% for leisure

Least satisfied with frequency and reliability of service



WALKERS

15% commute to work (25% A25-44) – men + women equally

7% walk to school (24% Clack., vs. 9% Wash., 3% Mult.)

65% walk for shopping or errands, 70% for leisure activities

20% not satisfied with safety – awareness by cars + cyclists

EMPLOYER SUPPORT

Employer or school offers financial incentives to commute:

Financial incentive for	N=369
Transit	21%
Carpooling or vanpooling	9%
Biking/Walking	8%
None of the above	67%
Don't know	8%







30% say they're able to work from home some days

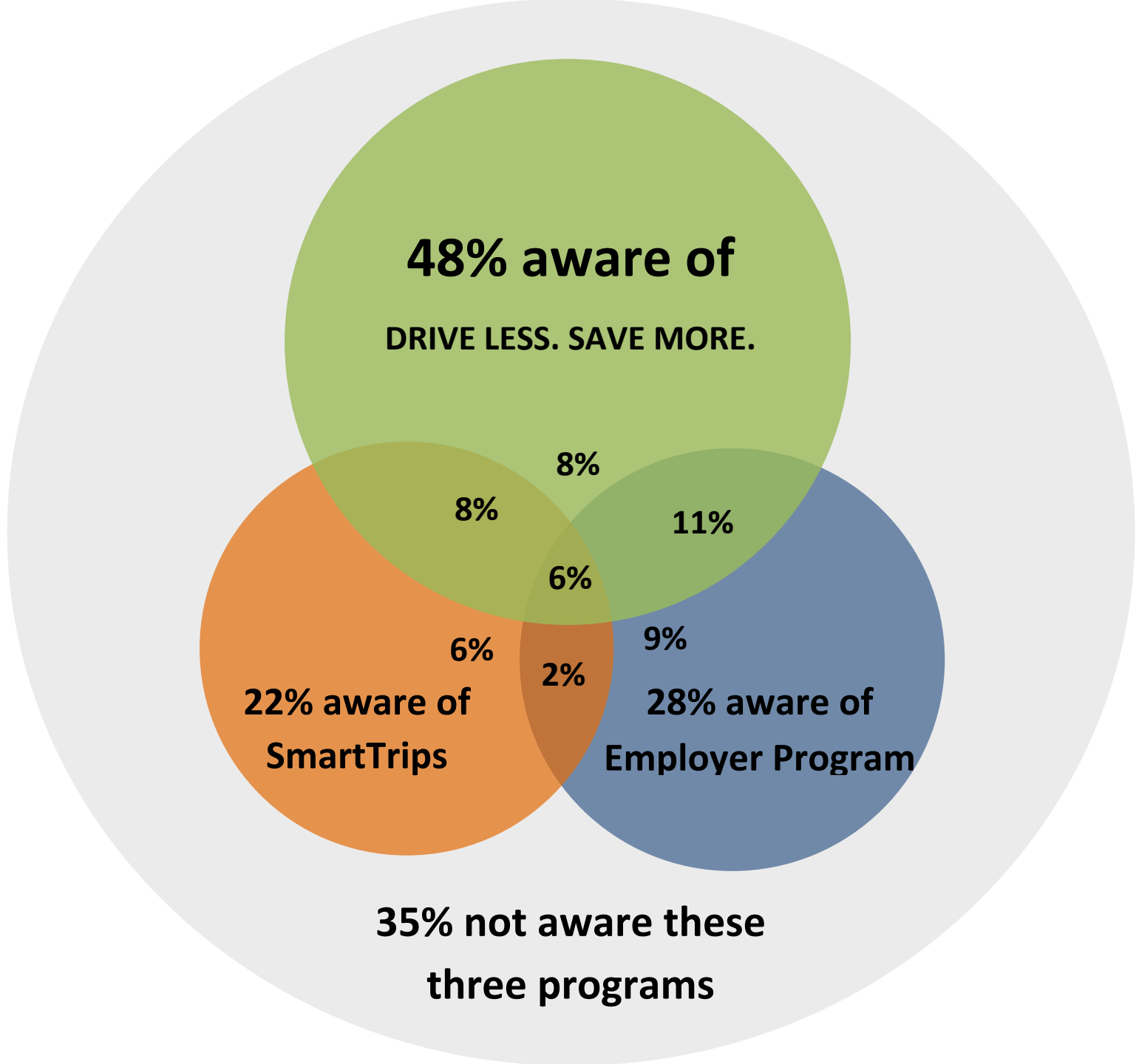
22% say that their employer offers an Emergency Ride Home

34% say they have seen information about Travel Option at their workplace or school



PROGRAM AWARENESS

		<u>MULT</u>	<u>WASH</u>	<u>CLACK</u>
	66% aware. 63% planned a transit-only trip, 17% multi-modal. Highest awareness = transit users, woman (73% vs. 59%) and younger adults 16-44	72%	60%	62%
	48% aware. 33% recalled seeing it on television. Highest awareness = older adults 45-64, woman (52% vs. 43%), white residents	45%	48%	52%
	40% aware. Highest awareness = middle incomes (\$25K-\$74K), adults 25-64	53%	27%	34%
	30% aware. 8% were motivated to bike year-round. Highest awareness = 25-64, access to a bike, motivated by health	38%	24%	23%
	22% aware. Highest awareness = Multnomah Co. residents, those aware of Sunday Parkways	29%	14%	17%
	22% aware. Highest awareness = women and those aware of Sunday Parkways	28%	15%	19%



48% aware of
DRIVE LESS. SAVE MORE.

8%

8%

11%

6%

6%

2%

9%

22% aware of
SmartTrips

28% aware of
Employer Program

35% not aware these
three programs

PROGRAM AWARENESS CON'T



20% aware. 68% aware of the guidebook, 23% aware of app, 32% walked more as a result of using the map. Highest awareness = adults 45-64, women, aware of Sunday Parkways, motivated by health over savings

MULT

26%

WASH

13%

CLACK

20%



19% aware. 15% biked more as a result of using the map. Highest awareness = aware of Sunday Parkways, motivated by health over savings, have access to a bike

25%

14%

15%



17% aware. 30% recalled seeing it on television, 17% made few car trips. Highest awareness = older, established residents (45-64, 11+yrs), aware of DSLM

19%

16%

17%

Awareness is important, but isn't always enough to spur action.



71% aware of carsharing options, 85% don't use it. Highest awareness = general population 16-64, income \$25K+, white... equally high awareness from Daily Drivers

78%

64%

67%

MOTIVATIONS + MESSAGING

Reasons why people might reduce the amount they drive...



41% say to save money... avg. \$26 per week (\$1,352/year)
Younger adults 16-44, middle incomes \$50K-\$74K, those receptive to transit and carpooling



24% say to be healthier... 45% exercise, 21% cardio / heart, 17% lose weight... resonates most with middle-aged adults, highest incomes, active bikers and walkers



12% say to spend less time in traffic... avg. 45min / week (or 1.5 days per year), resonates only slightly more with adults 45-64

18% don't know what would make them change the amount they drive.
Jumps to 38% for adults 65+ and indexes higher among lower incomes.